

Guam Visitors Bureau

Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

QTR.2 (JANUARY – MARCH 2017)

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **1,060** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **1,060** is +/- 3.02 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 3.02 percentage points.

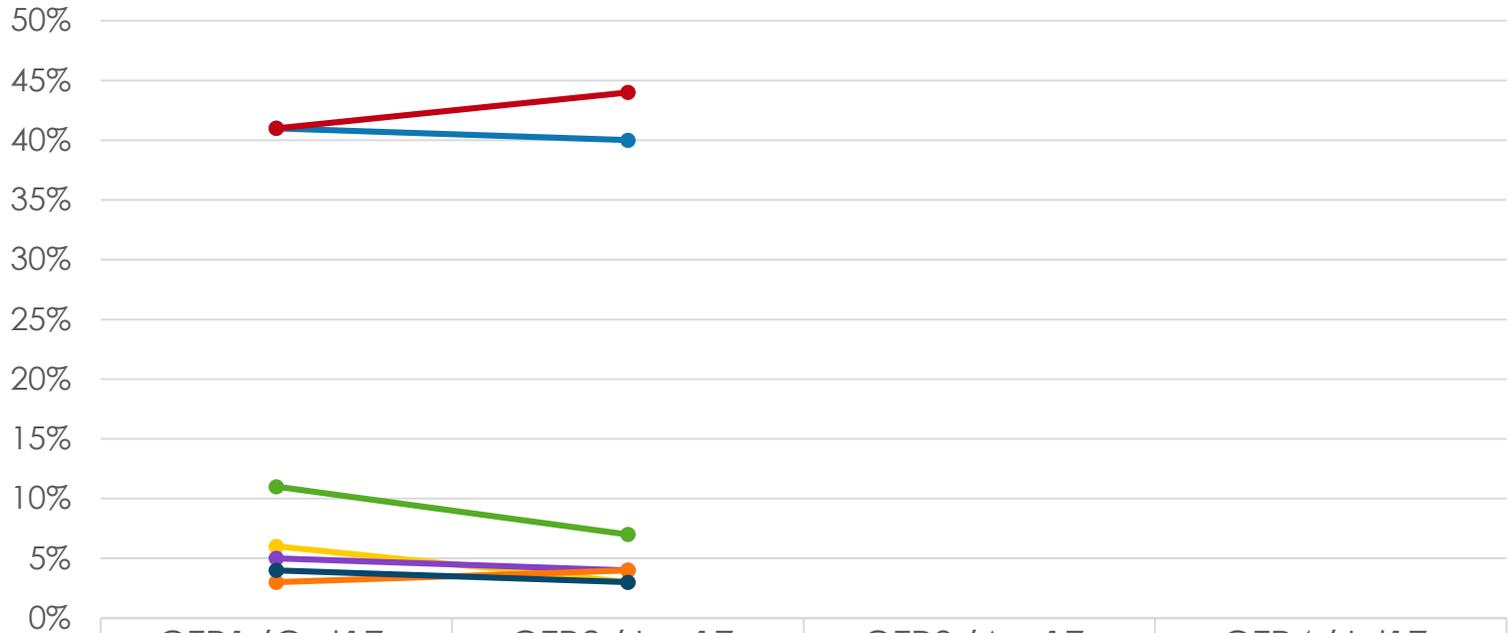
Objectives

- To monitor the effectiveness of the Japanese seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japanese marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families (Q6)
 - Office Lady/ Salary Woman (Gender/ Q25 Office worker- non-managerial)
 - Group Tour (Q7)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Silver (QF Age 60+)
 - Wedding (Q5A)
 - Repeat Visitor (Q3A)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Japan visitors) the most important determinants of on-island spending

Key Highlighted Segments

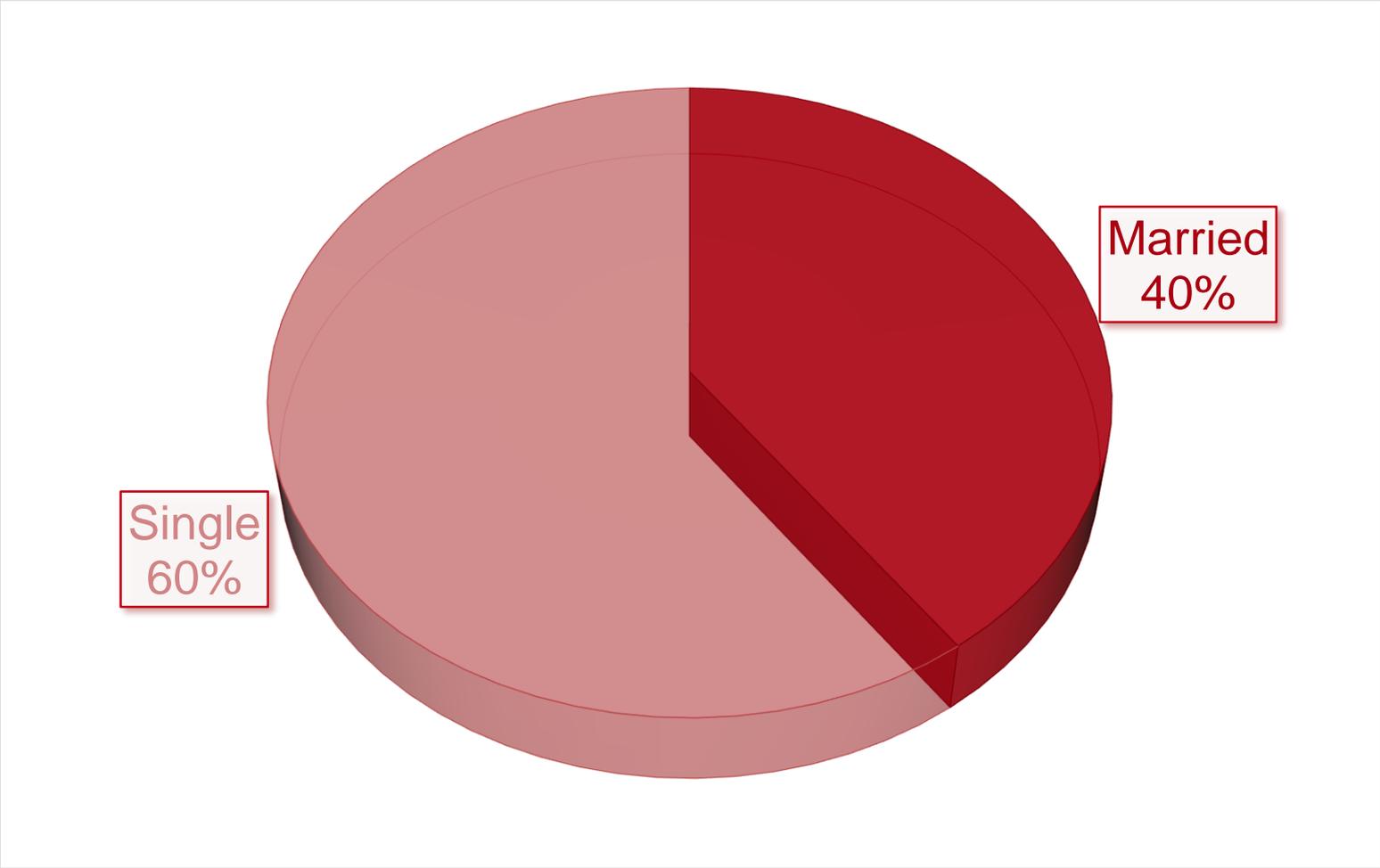


| | QTR1 (Oct17-Dec17) | QTR2 (Jan17-Mar17) | QTR3 (Apr17-Jun17) | QTR4 (Jul17-Sept17) |
|-------------|--------------------|--------------------|--------------------|---------------------|
| Family | 41% | 40% | | |
| Repeat | 41% | 44% | | |
| Office Lady | 11% | 7% | | |
| Wedding | 6% | 3% | | |
| Silver | 5% | 4% | | |
| Group | 3% | 4% | | |
| MICE | 4% | 3% | | |

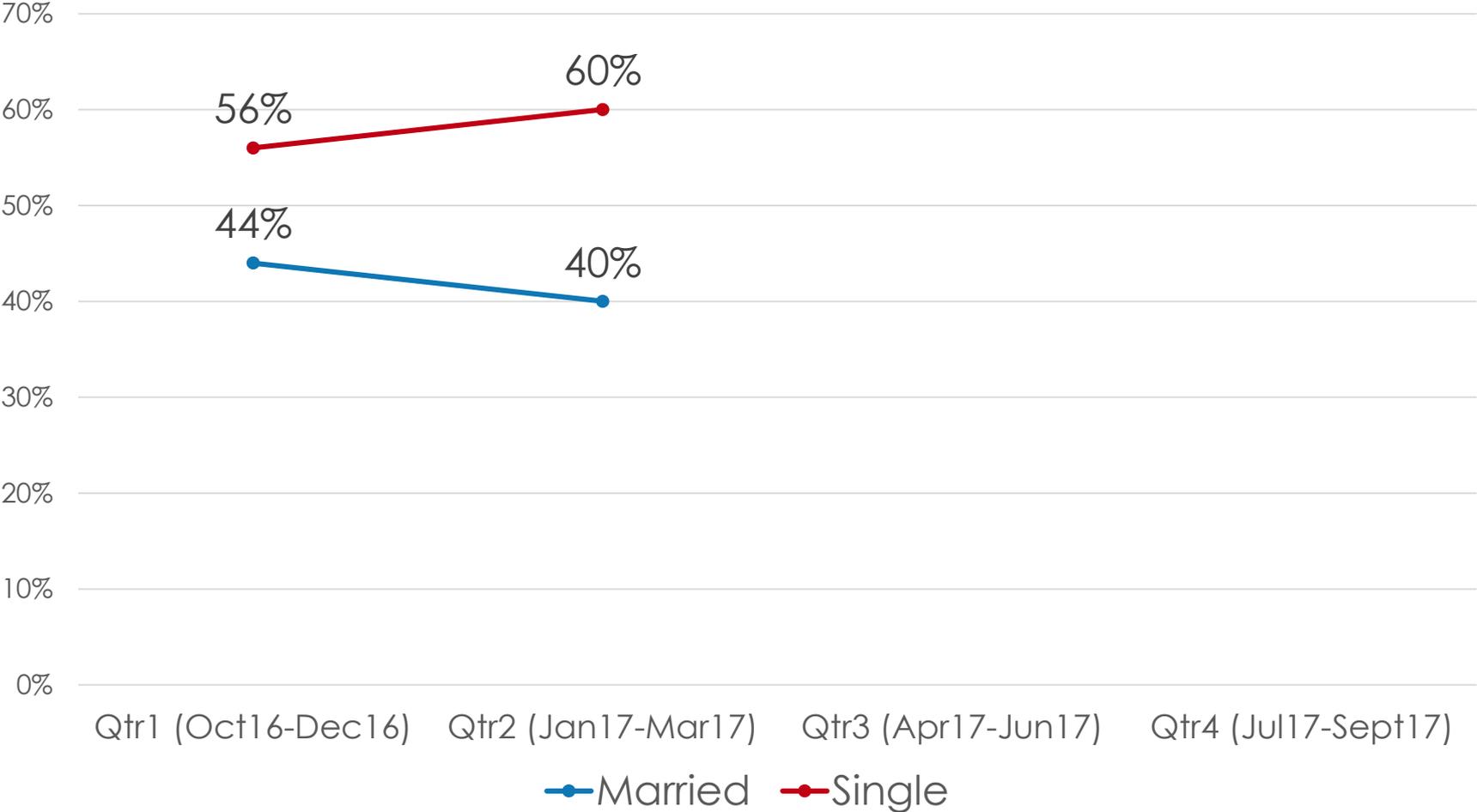
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

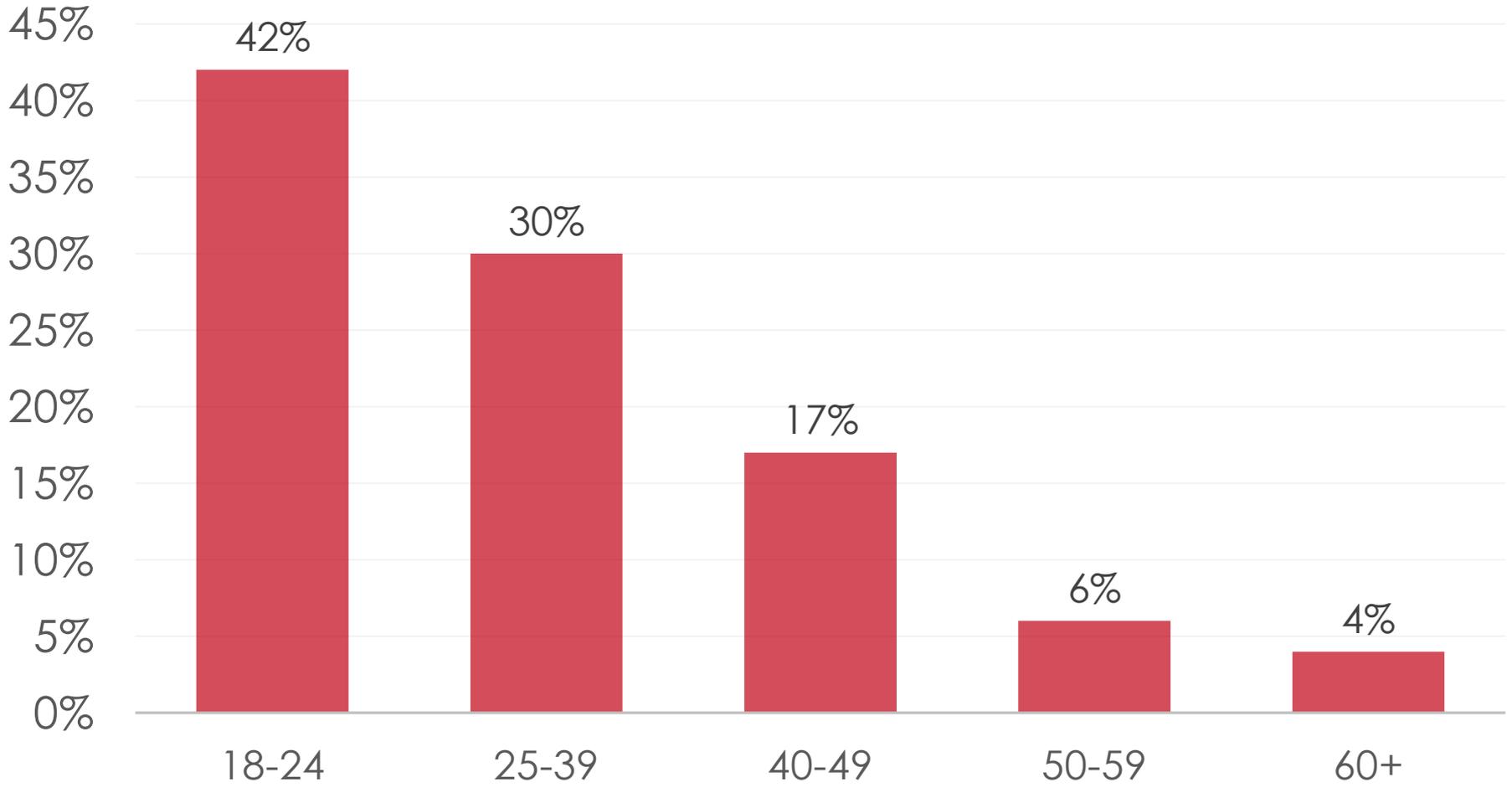
QE Are you married or single?

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|---------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| QE | Married | 40% | 84% | 38% | 22% | 93% | 80% | 55% | 36% |
| | Single | 60% | 16% | 62% | 78% | 7% | 20% | 45% | 64% |
| | Total | 1058 | 420 | 79 | 41 | 46 | 35 | 462 | 28 |

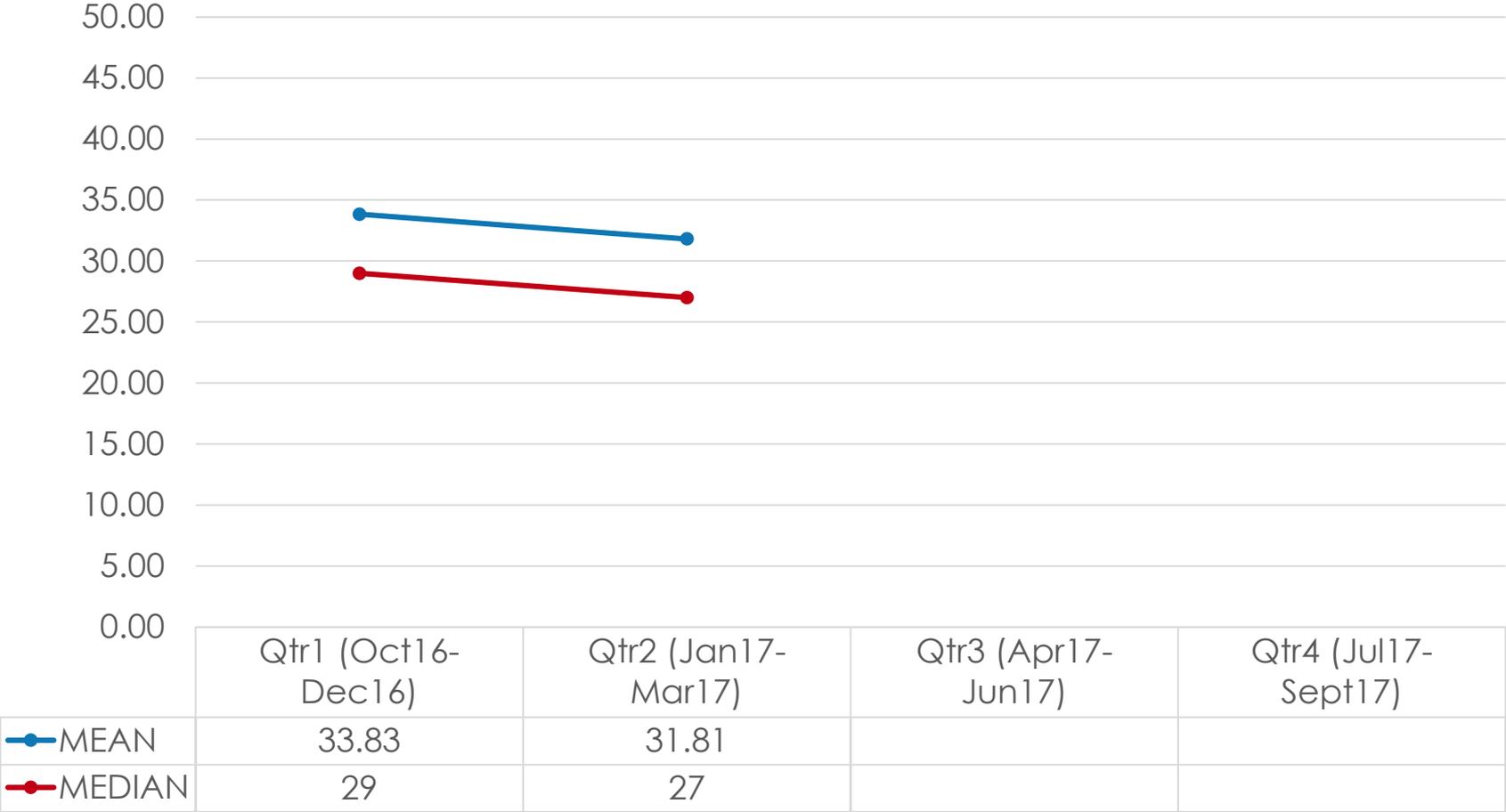
Prepared by QMark Research

Age

MEAN = 31.81
MEDIAN = 27



Age – FY2017 Tracking



Age – Key Segments

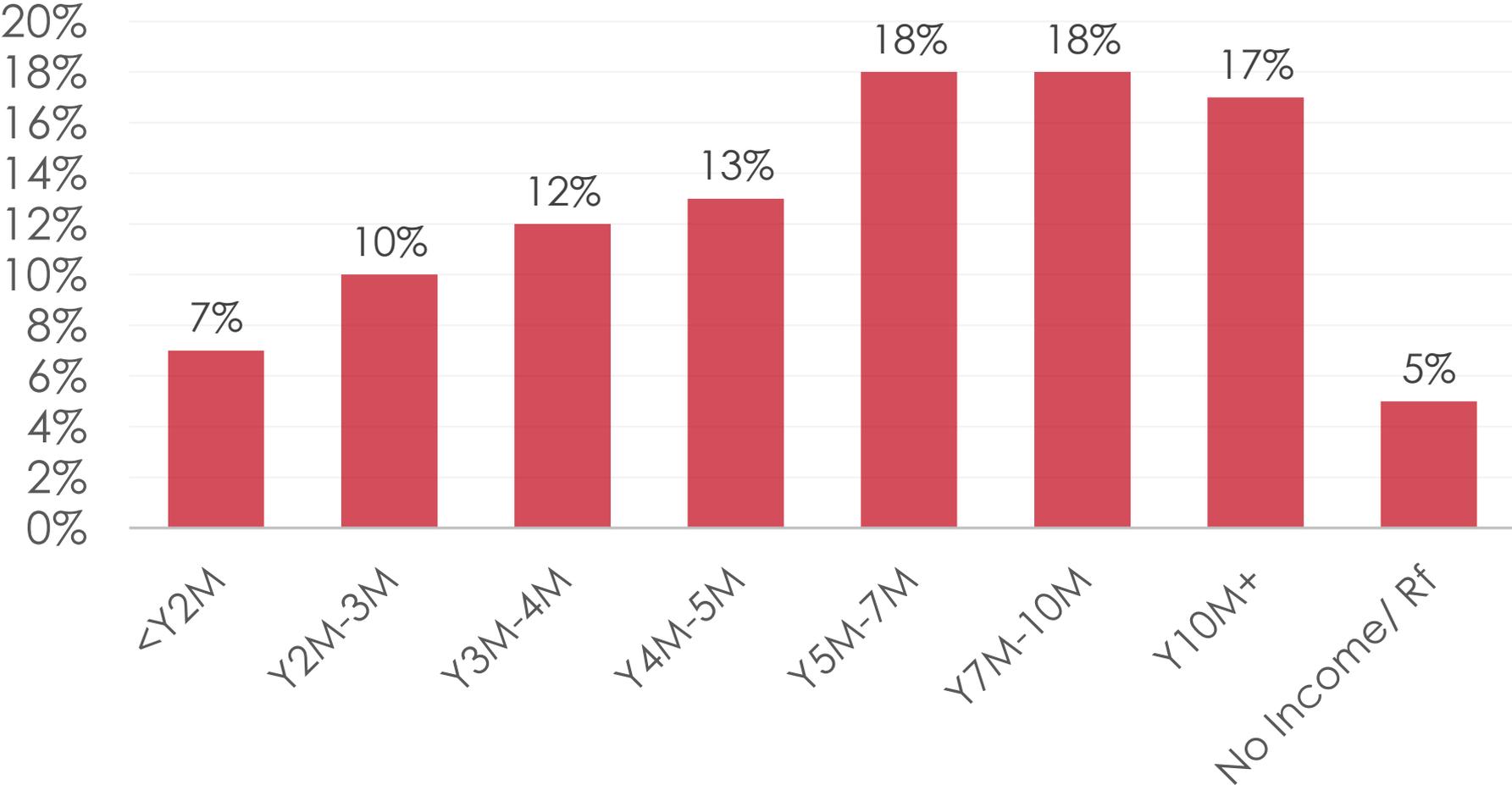
GUAM VISITORS BUREAU - EXIT SURVEY

QF And what was your age on your last birthday?

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|--------|-------|--------|---------------------------|------------|---------|---------|--------|-------|
| | | - | - | - | - | - | - | - | - |
| QF | 18-24 | 42% | 10% | 12% | 59% | | 6% | 23% | 21% |
| | 25-39 | 30% | 37% | 58% | 29% | | 60% | 35% | 61% |
| | 40-49 | 17% | 35% | 23% | 7% | | 6% | 27% | 7% |
| | 50-59 | 6% | 11% | 8% | 2% | | 17% | 10% | 4% |
| | 60+ | 4% | 8% | | 2% | 100% | 11% | 6% | 7% |
| | Total | 1056 | 420 | 78 | 41 | 46 | 35 | 463 | 28 |
| QF | Mean | 31.81 | 40.00 | 34.95 | 27.66 | 64.65 | 38.03 | 36.59 | 33.61 |
| | Median | 27 | 40 | 33 | 22 | 63 | 30 | 35 | 32 |

Prepared by QMark Research

Annual Household Income



Annual Household Income – Key Segments

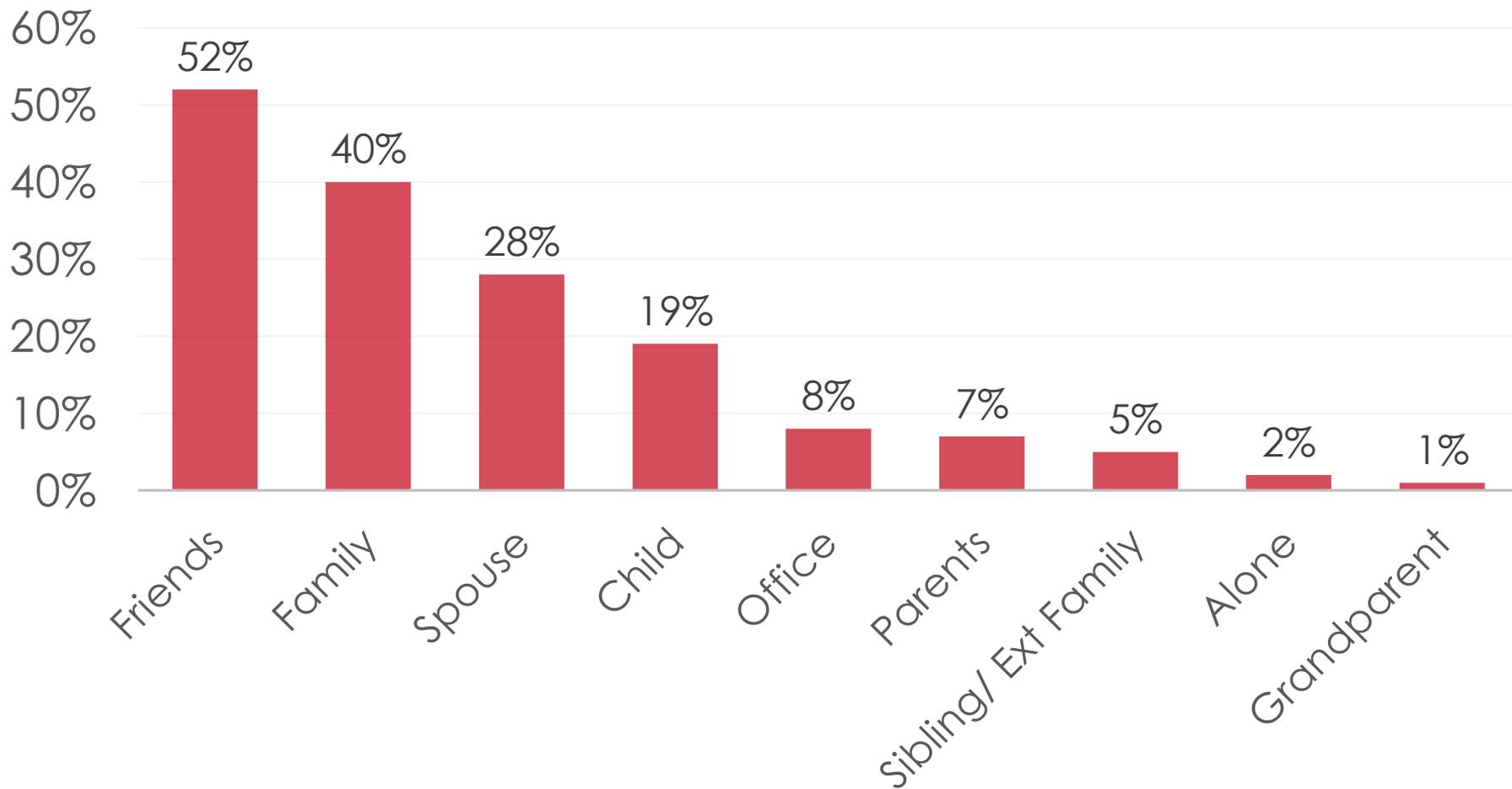
GUAM VISITORS BUREAU - EXIT SURVEY

Q26 What is your approximate annual household income before taxes?

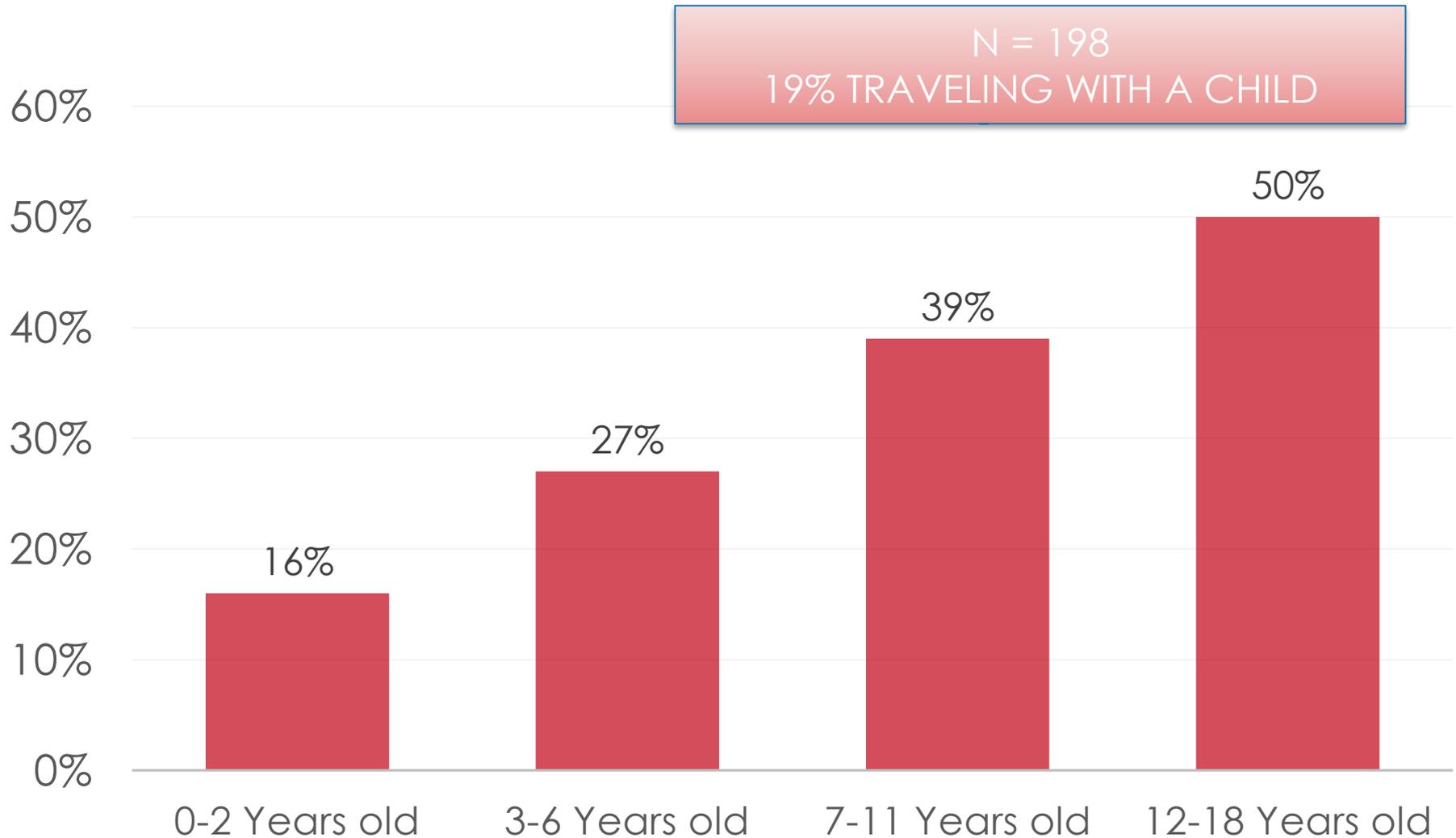
| | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|-------------------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | - | - | - | - | - | - | - | - |
| Q26 <Y2.0 million | 7% | 4% | 1% | 7% | 10% | 12% | 5% | 9% |
| Y2.0M-Y3.0M | 10% | 6% | 13% | 13% | 17% | 15% | 8% | 23% |
| Y3.0M-Y4.0M | 12% | 9% | 19% | 13% | 7% | 6% | 12% | 27% |
| Y4.0M-Y5.0M | 13% | 12% | 17% | 20% | 10% | 12% | 12% | 9% |
| Y5.0M-Y7.0M | 18% | 20% | 19% | 20% | 22% | 21% | 18% | 14% |
| Y7.0M-Y10.0M | 18% | 25% | 17% | 3% | 15% | 24% | 20% | |
| Y10.0M+ | 17% | 21% | 13% | 13% | 12% | 12% | 22% | 18% |
| No Income | 5% | 2% | | 10% | 7% | | 3% | |
| Total | 897 | 387 | 69 | 30 | 41 | 34 | 409 | 22 |

Prepared by QMark Research

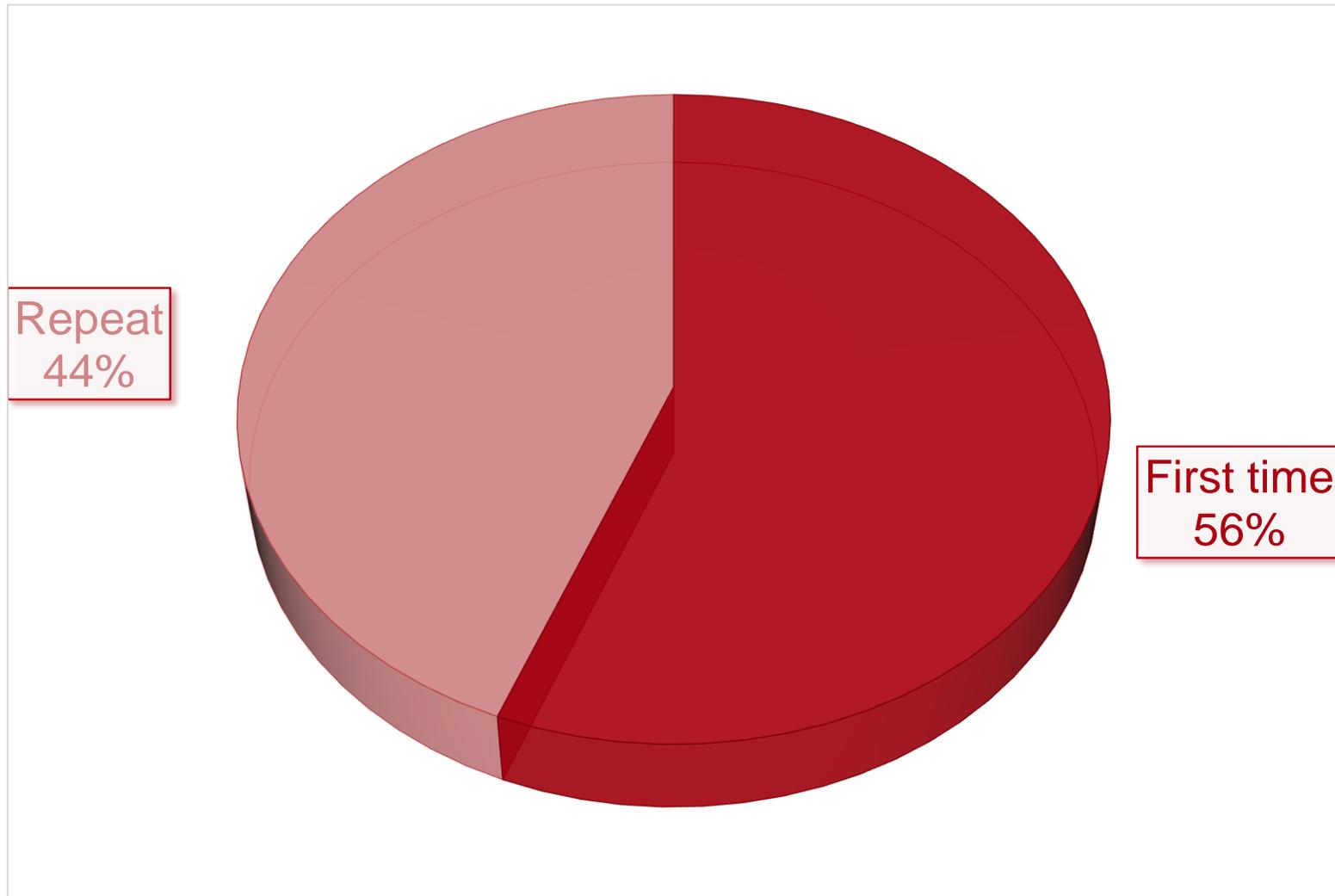
Travel Party



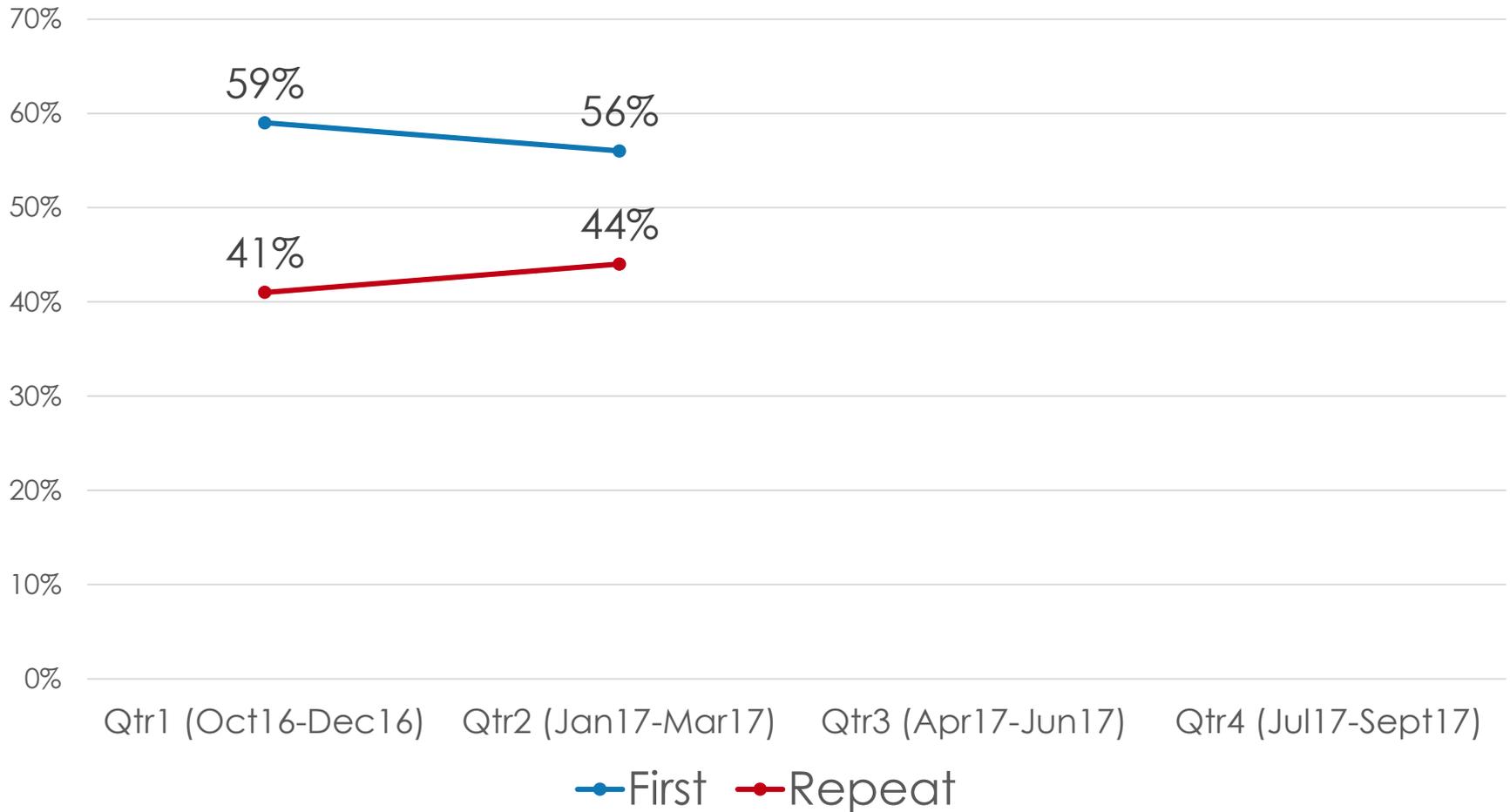
Travel Party - Children



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

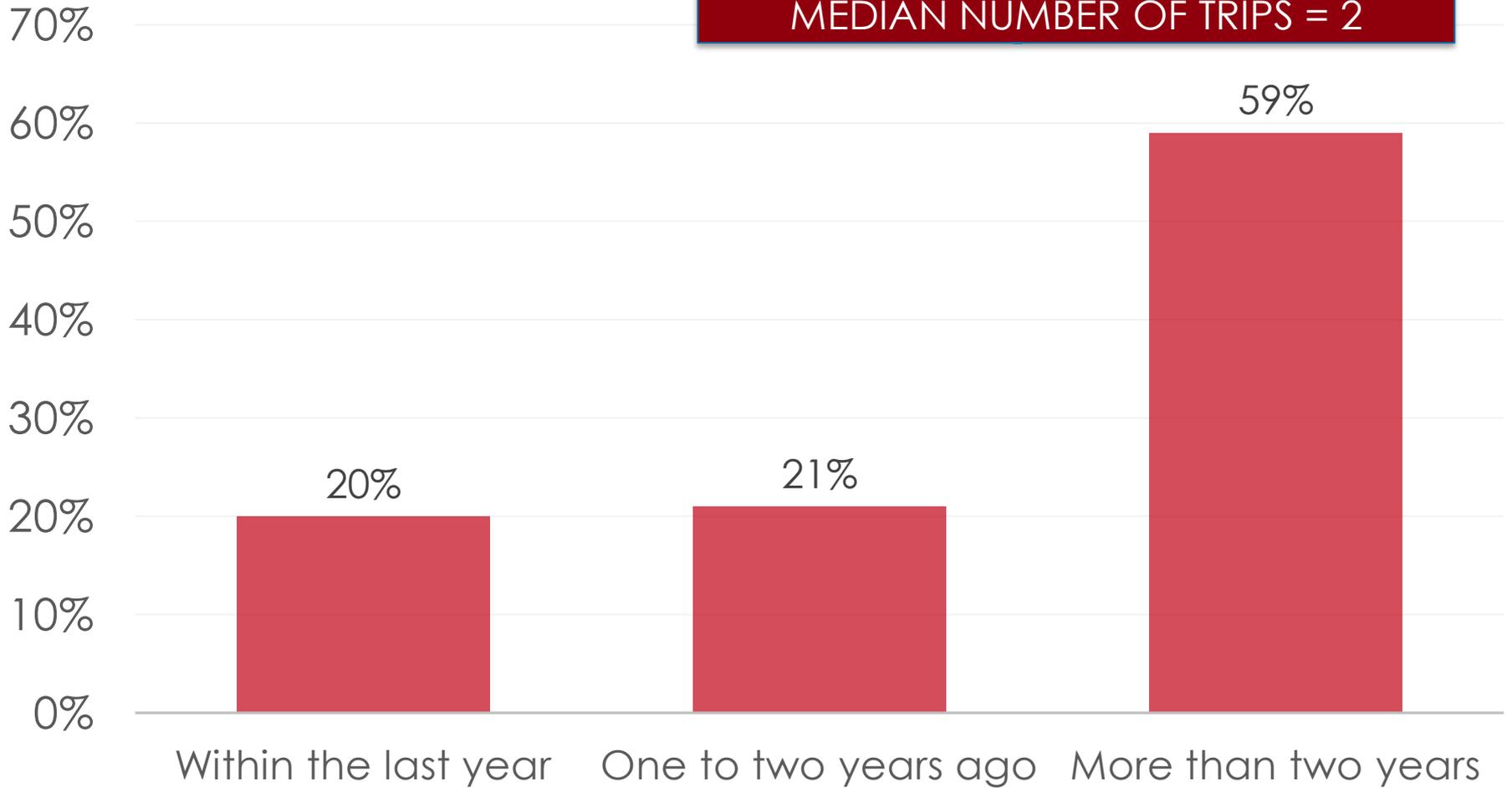
Q3A Is this your first trip to Guam?

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|-----|-------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| q3a | Yes | 56% | 40% | 54% | 65% | 39% | 60% | | 32% |
| | No | 44% | 60% | 46% | 35% | 61% | 40% | 100% | 68% |
| | Total | 1056 | 420 | 79 | 40 | 46 | 35 | 463 | 28 |

Prepared by QMark Research

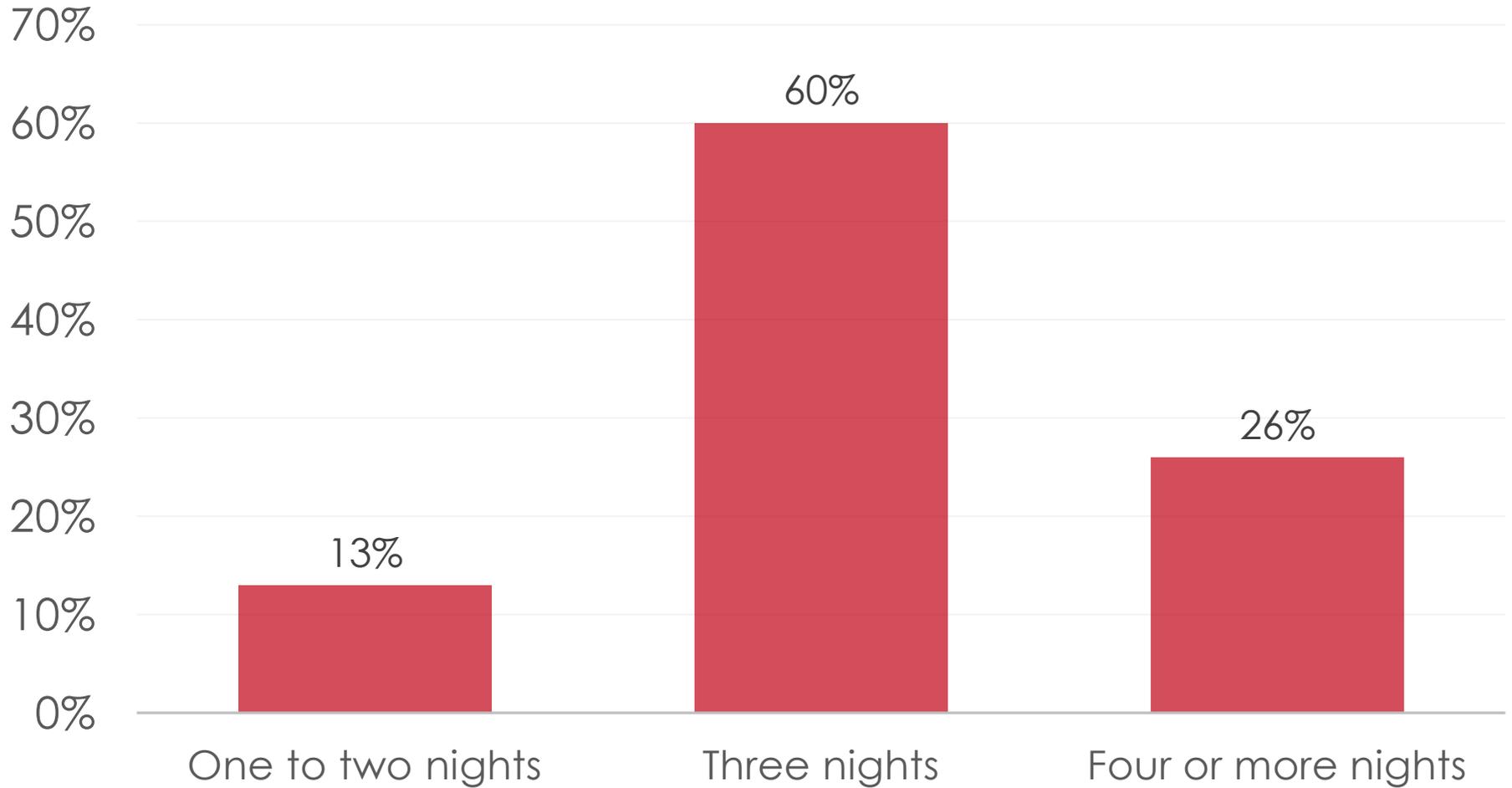
Repeat Visitor- Most Recent Trip

N = 440
MEAN NUMBER OF TRIPS = 3.58
MEDIAN NUMBER OF TRIPS = 2

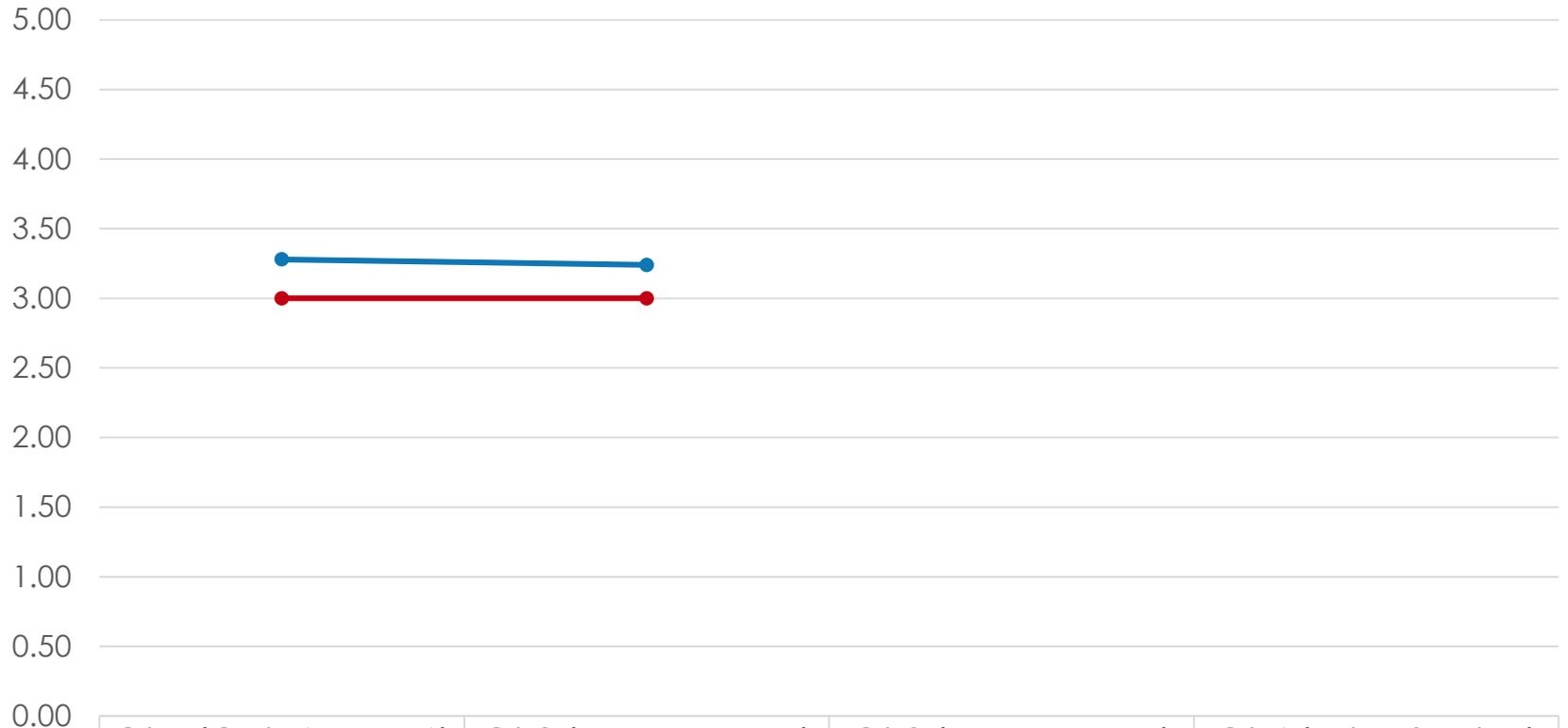


Length of Stay

MEAN NUMBER OF NIGHTS = 3.24
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay – FY2017 Tracking



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN | 3.28 | 3.24 | | |
| MEDIAN | 3 | 3 | | |

Length of Stay – Key Segments

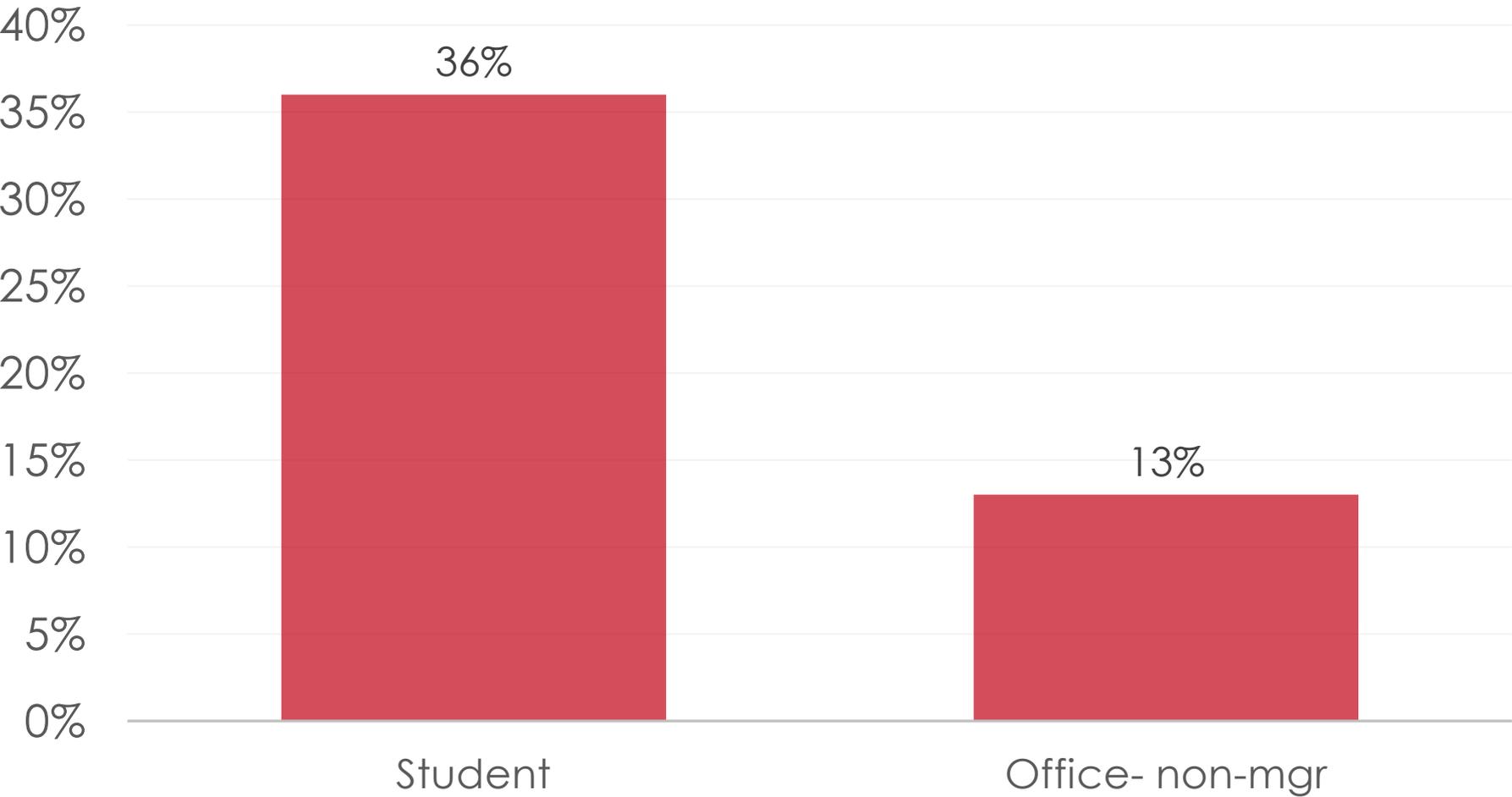
GUAM VISITORS BUREAU - EXIT SURVEY

Q8 How many nights did you stay on Guam?

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|--------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| Q8 | 1-2 | 13% | 7% | 26% | 19% | 13% | 17% | 11% | 30% |
| | 3 | 60% | 55% | 54% | 50% | 54% | 40% | 58% | 44% |
| | 4+ | 26% | 37% | 21% | 31% | 33% | 43% | 31% | 26% |
| | Total | 1025 | 406 | 78 | 36 | 46 | 35 | 447 | 27 |
| Q8 | Mean | 3.24 | 3.52 | 3.01 | 3.28 | 3.52 | 3.40 | 3.38 | 3.15 |
| | Median | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

Prepared by QMark Research

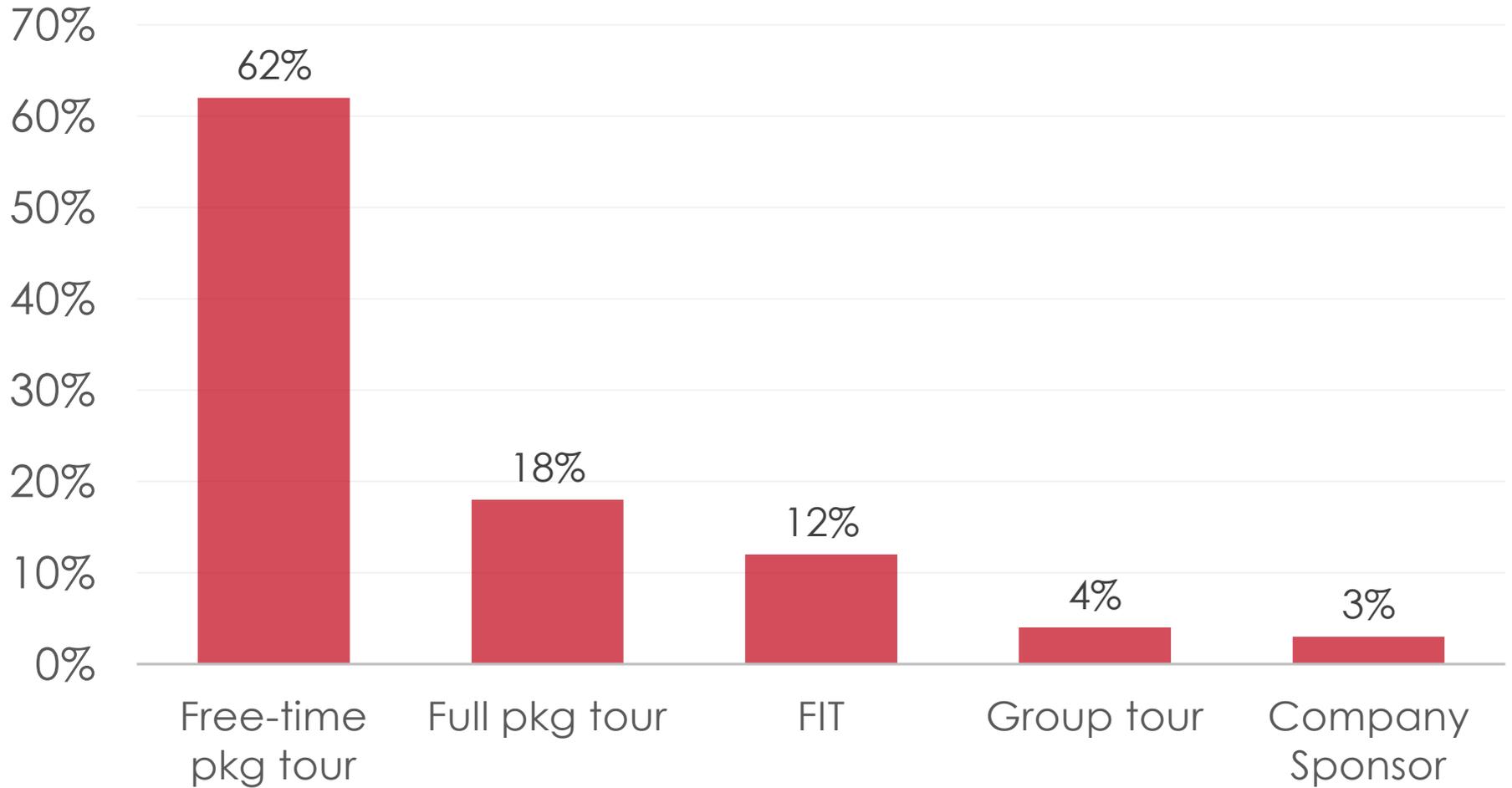
Occupation – Top Responses (10%+)



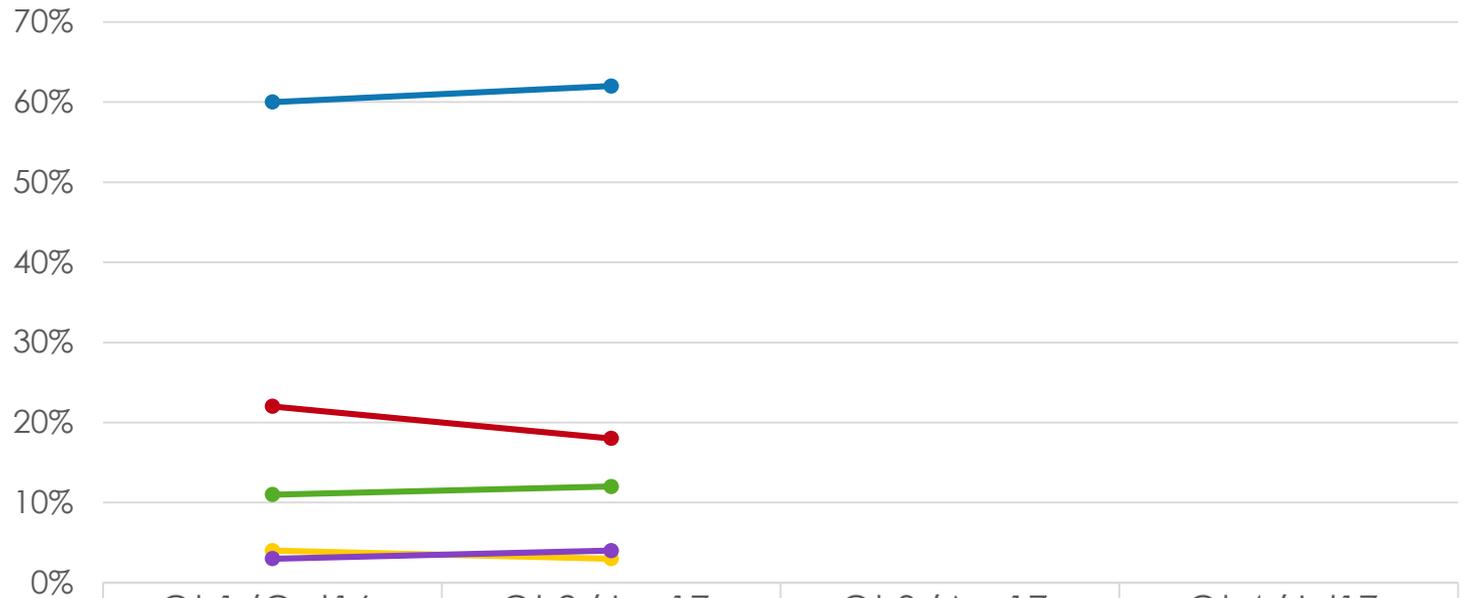
SECTION 2

TRAVEL PLANNING

Travel Planning



Travel Planning – FY2017 Tracking



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|--------------------|------------------------|------------------------|------------------------|-------------------------|
| Free-time pkg tour | 60% | 62% | | |
| Full pkg tour | 22% | 18% | | |
| FIT | 11% | 12% | | |
| Company | 4% | 3% | | |
| Group | 3% | 4% | | |

Travel Planning – Key Segments

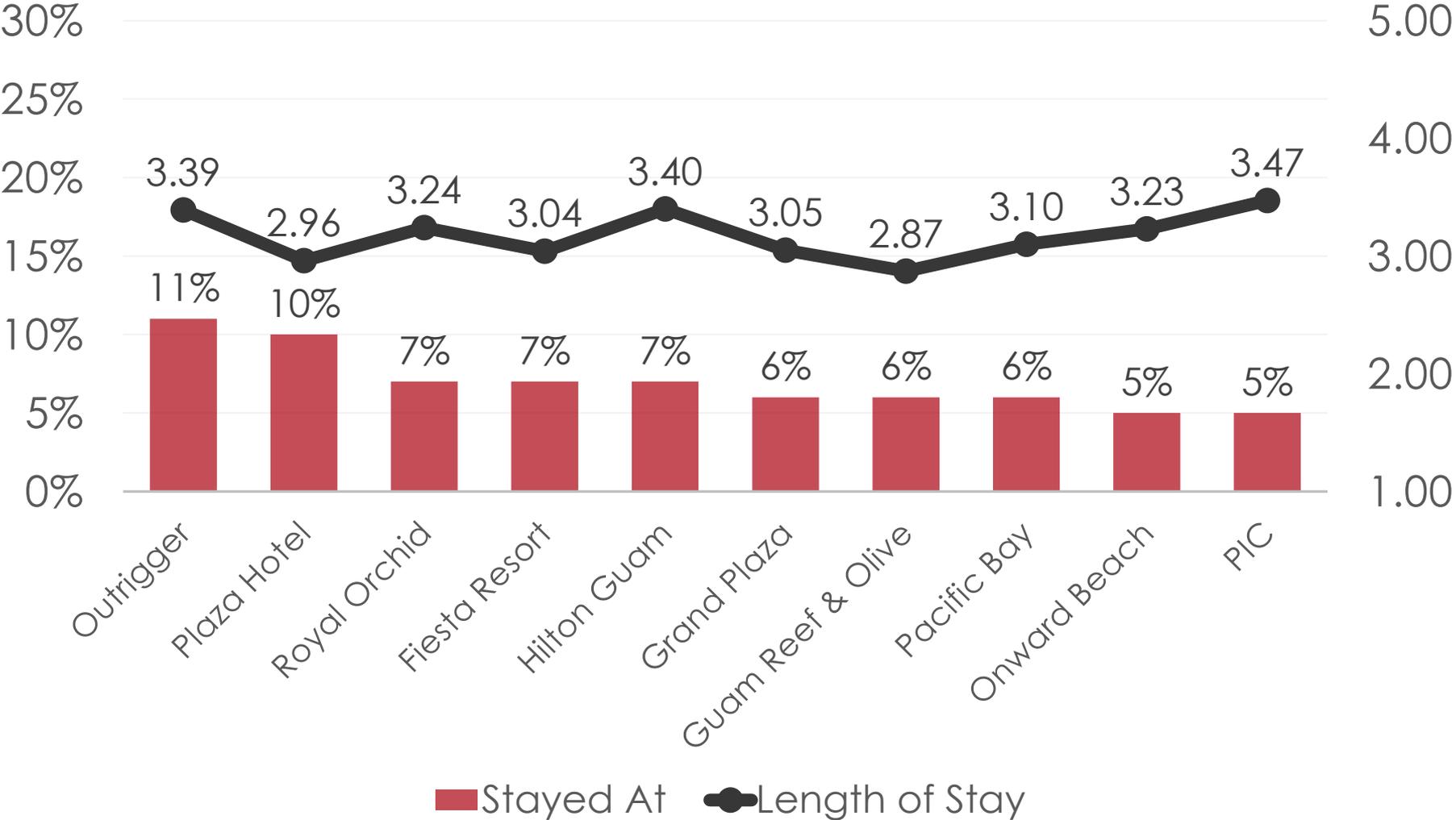
GUAM VISITORS BUREAU - EXIT SURVEY

Q7 Please describe your travel arrangements to Guam?

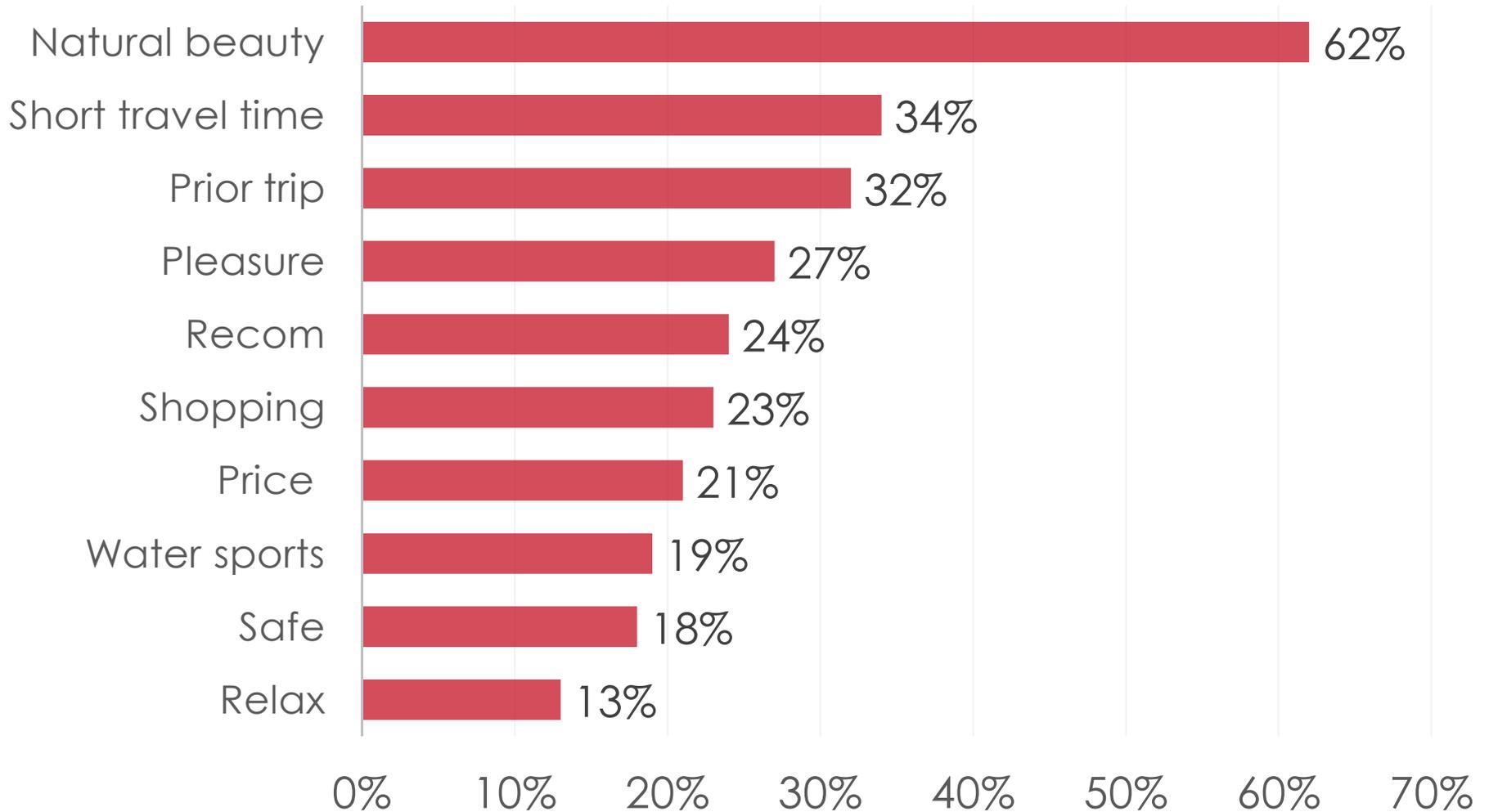
| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|------------------------------------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| Q7 | Free-time package tour | 62% | 58% | 66% | | 53% | 71% | 56% | 18% |
| | Full package tour | 18% | 20% | 10% | | 22% | 24% | 17% | 11% |
| | Individually arranged travel (FIT) | 12% | 18% | 15% | | 22% | 6% | 19% | 4% |
| | Group tour | 4% | 2% | 3% | 100% | 2% | | 3% | 32% |
| | Company paid travel | 3% | 1% | 6% | | | | 4% | 36% |
| | Other | 1% | 0% | | | | | 1% | |
| | Total | 1046 | 417 | 79 | 41 | 45 | 34 | 458 | 28 |

Prepared by QMark Research

Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

Q5A Please select the top 3 reasons that motivated you to travel to Guam?

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|-----|------------------------------------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| Q5A | Natural beauty | 62% | 60% | 72% | 44% | 57% | 37% | 57% | 18% |
| | Short travel time | 34% | 47% | 46% | 15% | 48% | 23% | 37% | 14% |
| | Previous trip | 32% | 45% | 37% | 22% | 43% | 31% | 74% | 43% |
| | Pleasure | 27% | 26% | 20% | 34% | 22% | 17% | 25% | 11% |
| | Recomm- friend/family/trvl agnt | 24% | 15% | 19% | 32% | 22% | 11% | 15% | 7% |
| | Shopping | 23% | 18% | 25% | 24% | 22% | 14% | 22% | 11% |
| | Price | 21% | 15% | 15% | 20% | 7% | 6% | 16% | 7% |
| | Water sports | 19% | 18% | 11% | 7% | 4% | 3% | 13% | |
| | Safe | 18% | 20% | 16% | 7% | 20% | 11% | 16% | 14% |
| | Relax | 13% | 14% | 20% | 7% | 15% | 6% | 17% | 4% |
| | Company/ Business Trip | 5% | 2% | 11% | 39% | 4% | | 6% | 61% |
| | Honeymoon | 5% | 11% | 4% | | | 20% | 3% | |
| | Visit friends/ Relatives | 4% | 4% | | 5% | 4% | 9% | 3% | |
| | Scuba | 4% | 4% | 1% | | 4% | 3% | 4% | |
| | Married/ Attn wedding | 3% | 6% | 4% | | 9% | 100% | 3% | |
| | Other | 3% | 2% | | 5% | 2% | 6% | 3% | 4% |
| | Golf | 3% | 4% | 3% | 2% | 22% | | 5% | 11% |
| | Company Sponsored | 2% | 1% | | 22% | 4% | | 3% | 82% |
| | Convention/ Trade/ Conference | 0% | 0% | | | | | 1% | 18% |
| | Organized sports | 0% | 1% | | | 4% | | 1% | 4% |
| | Career Cert/ Testing | 0% | 0% | | | | 6% | 0% | |
| | Total | 1056 | 421 | 79 | 41 | 46 | 35 | 463 | 28 |

Prepared by QMark Research

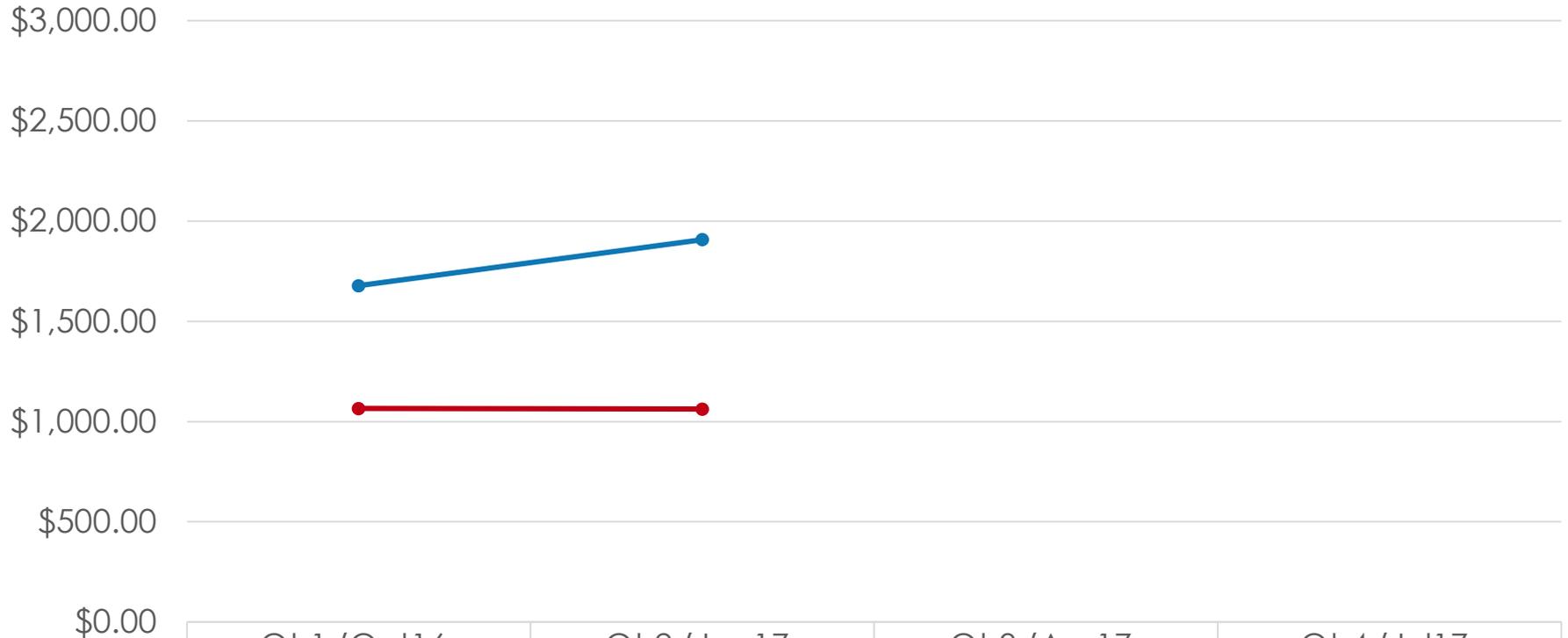
SECTION 3

EXPENDITURES

Prepaid Expenditures

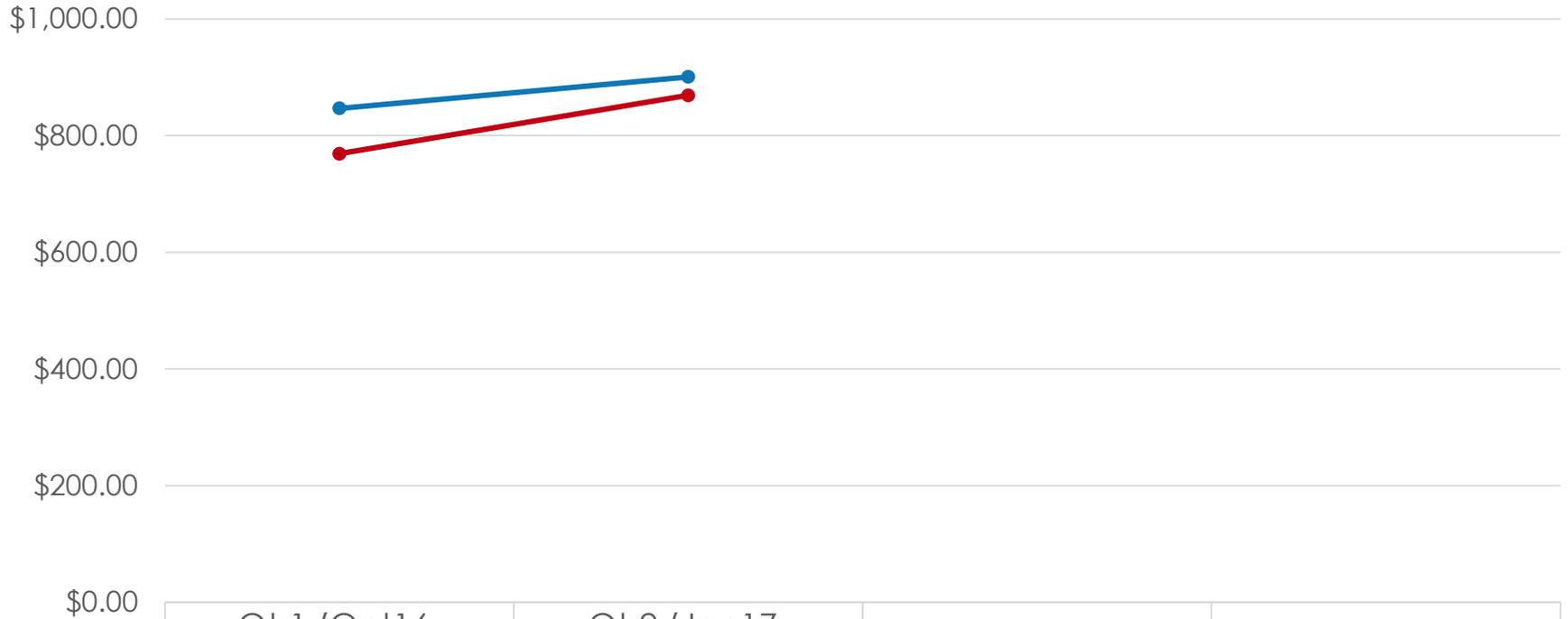
- \$1,907.55 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$900.65 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017 Tracking



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|--------|------------------------|------------------------|------------------------|-------------------------|
| MEAN | \$1,678.12 | \$1,907.55 | | |
| MEDIAN | \$1,065.00 | \$1,062.00 | | |

Prepaid Per Person– FY2017 Tracking



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|------------------------|------------------------|--------------------|---------------------|
| ● MEAN | \$846.66 | \$900.65 | | |
| ● MEDIAN | \$769.00 | \$869.00 | | |

Prepaid Per Person– Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

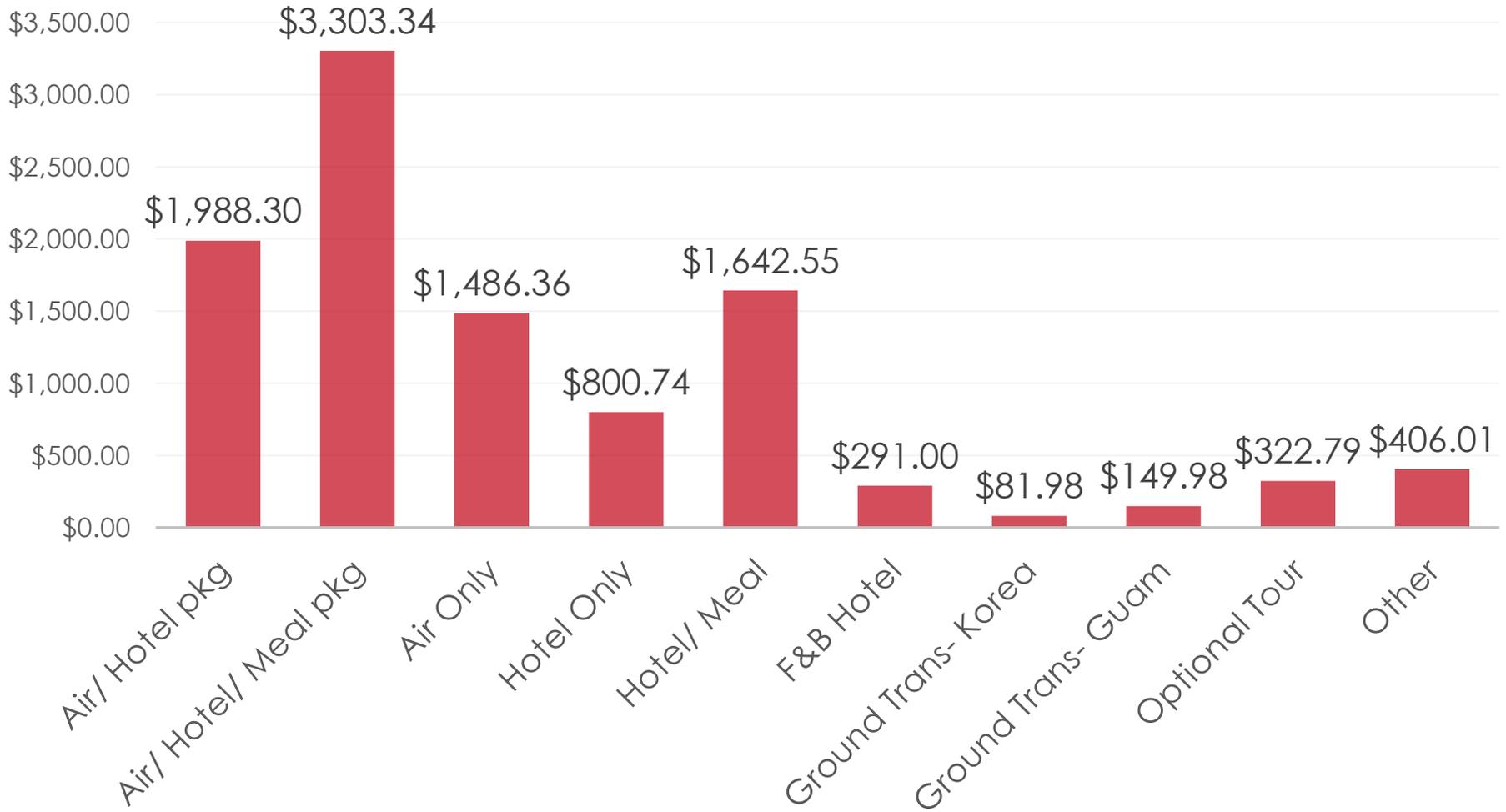
Q10A How much did you pay in Japan before coming to Guam for the tour package, your airfare, lodging meals, and transportation?

PER PERSON

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|------------|--------|----------|------------|---------------------------|------------|------------|------------|----------|----------|
| | | - | - | - | - | - | - | - | - |
| PREPAID PP | Mean | \$900.65 | \$1,068.48 | \$883.74 | \$515.45 | \$1,075.41 | \$1,280.24 | \$893.53 | \$364.16 |
| | Median | \$869 | \$1,017 | \$885 | \$354 | \$1,021 | \$1,043 | \$869 | \$0 |

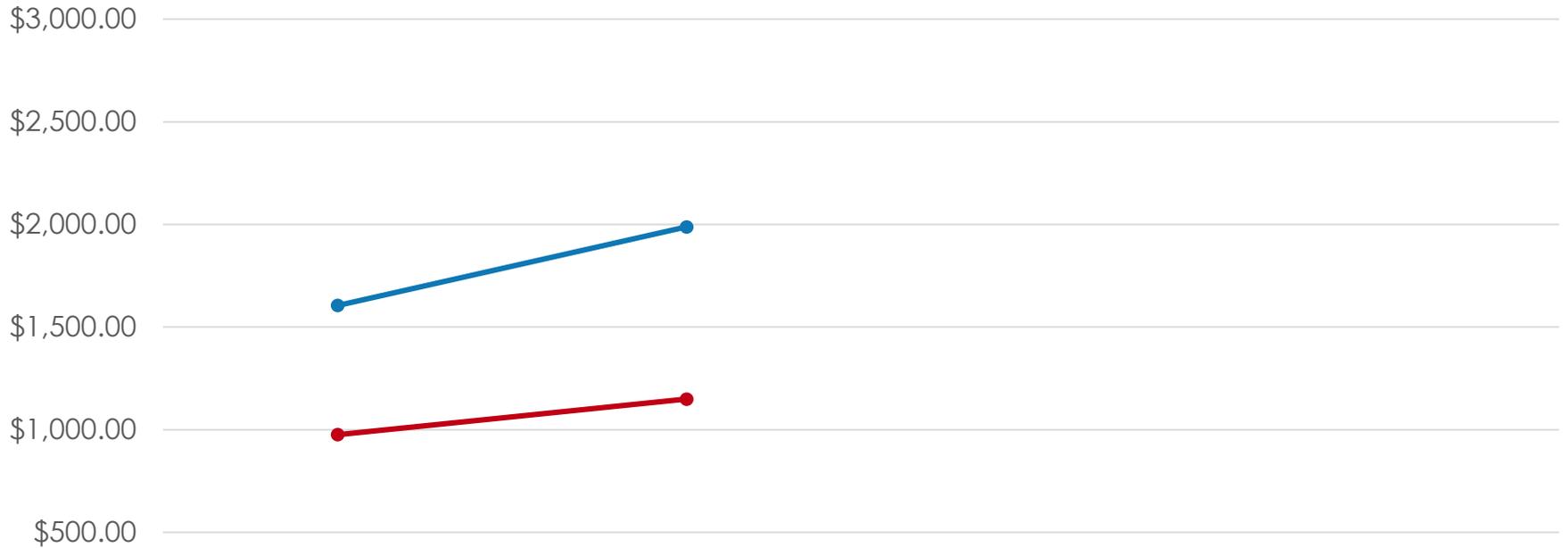
Prepared by QMark Research

Prepaid Expenses by Category – MEAN Entire Travel Party



Prepaid– FY2017 Tracking

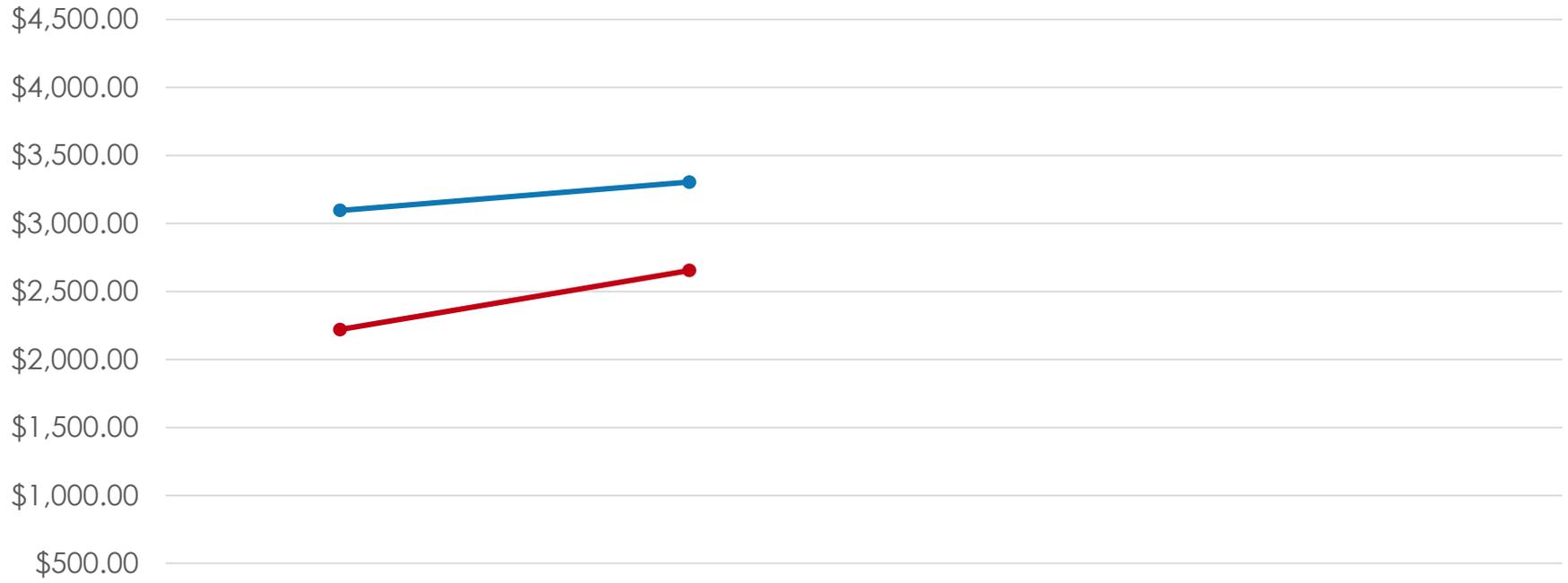
Airfare & Accommodation Packages



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN | \$1,605.02 | \$1,988.30 | | |
| MEDIAN | \$976.00 | \$1,149.00 | | |

Prepaid- FY2017 Tracking

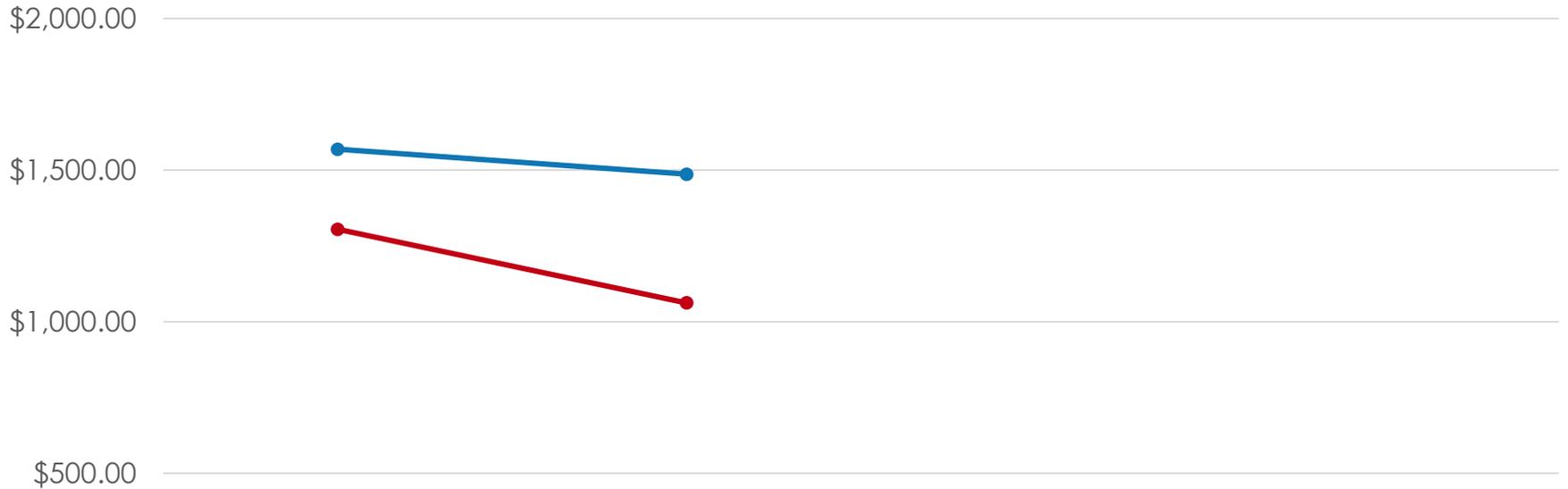
Airfare & Accommodation W/ Meal Packages



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN | \$3,094.83 | \$3,303.34 | | |
| MEDIAN | \$2,219.00 | \$2,654.00 | | |

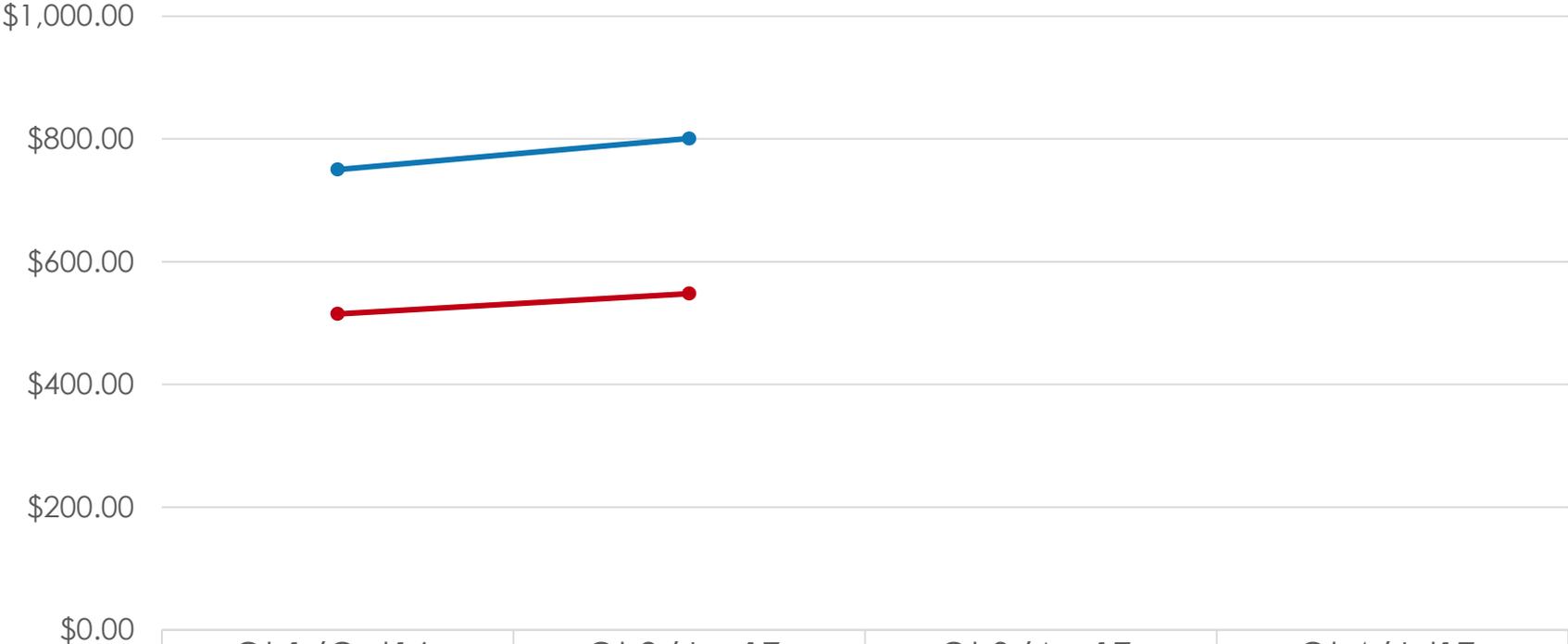
Prepaid– FY2017 Tracking

Airfare Only



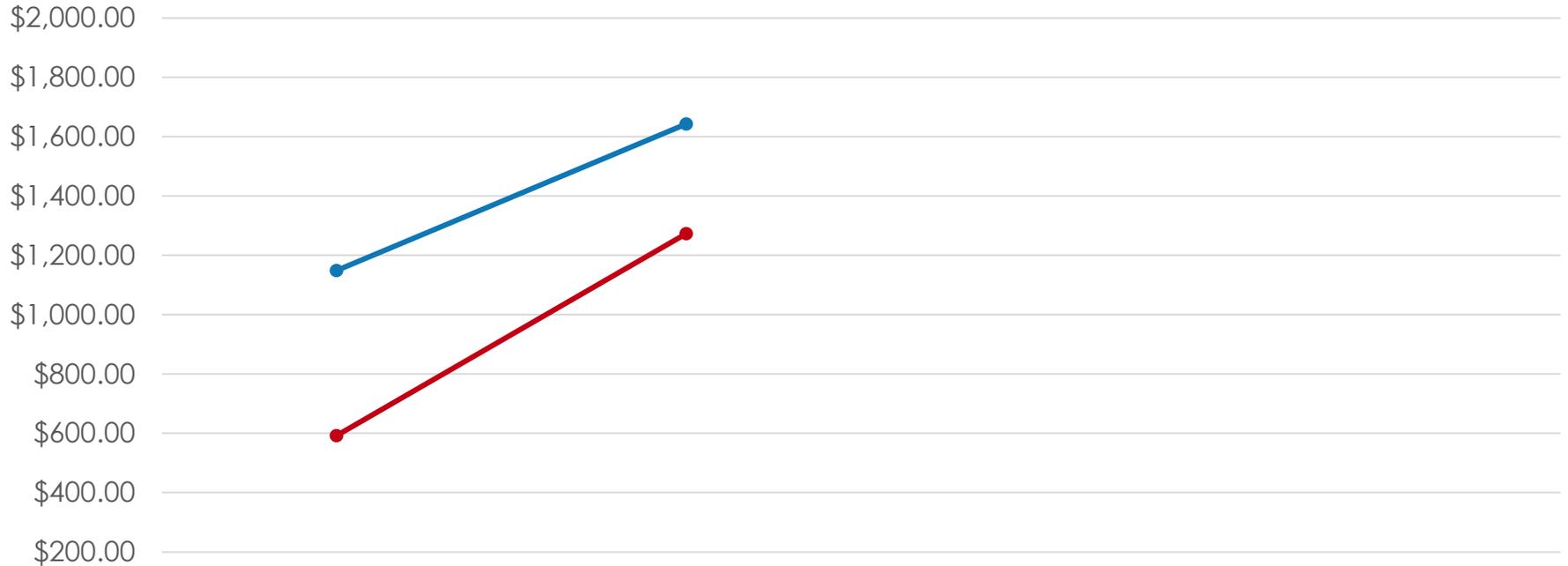
| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|------------------------|------------------------|--------------------|---------------------|
| ● MEAN | \$1,568.99 | \$1,486.36 | | |
| ● MEDIAN | \$1,305.00 | \$1,062.00 | | |

Prepaid- FY2017 Tracking Accommodations Only



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|----------|------------------------|------------------------|------------------------|-------------------------|
| ● MEAN | \$750.17 | \$800.74 | | |
| ● MEDIAN | \$515.00 | \$548.00 | | |

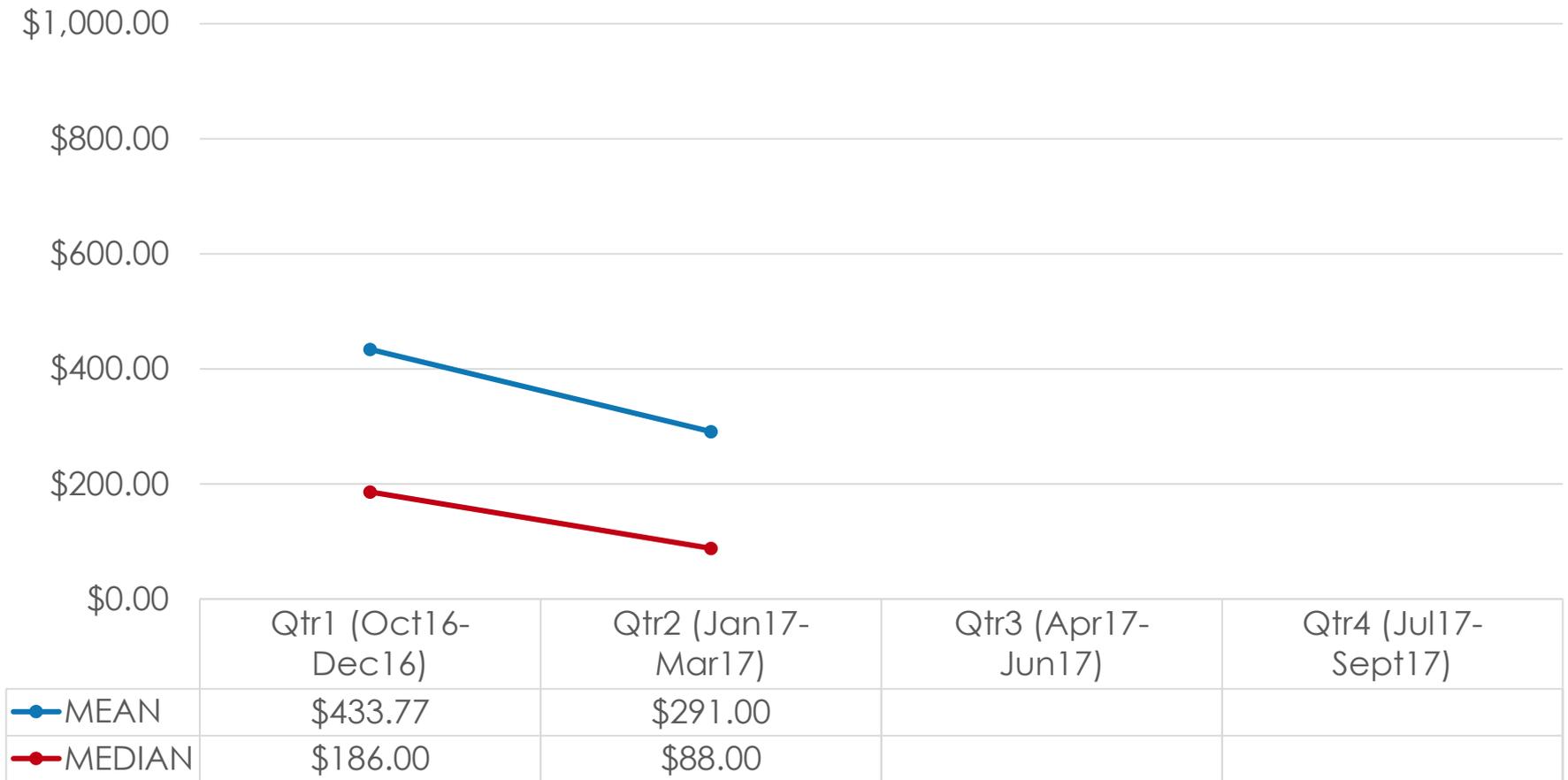
Prepaid- FY2017 Tracking Accommodations w/ Meal Only



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|----------|------------------------|--------------------|--------------------|---------------------|
| ● MEAN | \$1,148.40 | \$1,642.55 | | |
| ● MEDIAN | \$592.00 | \$1,273.00 | | |

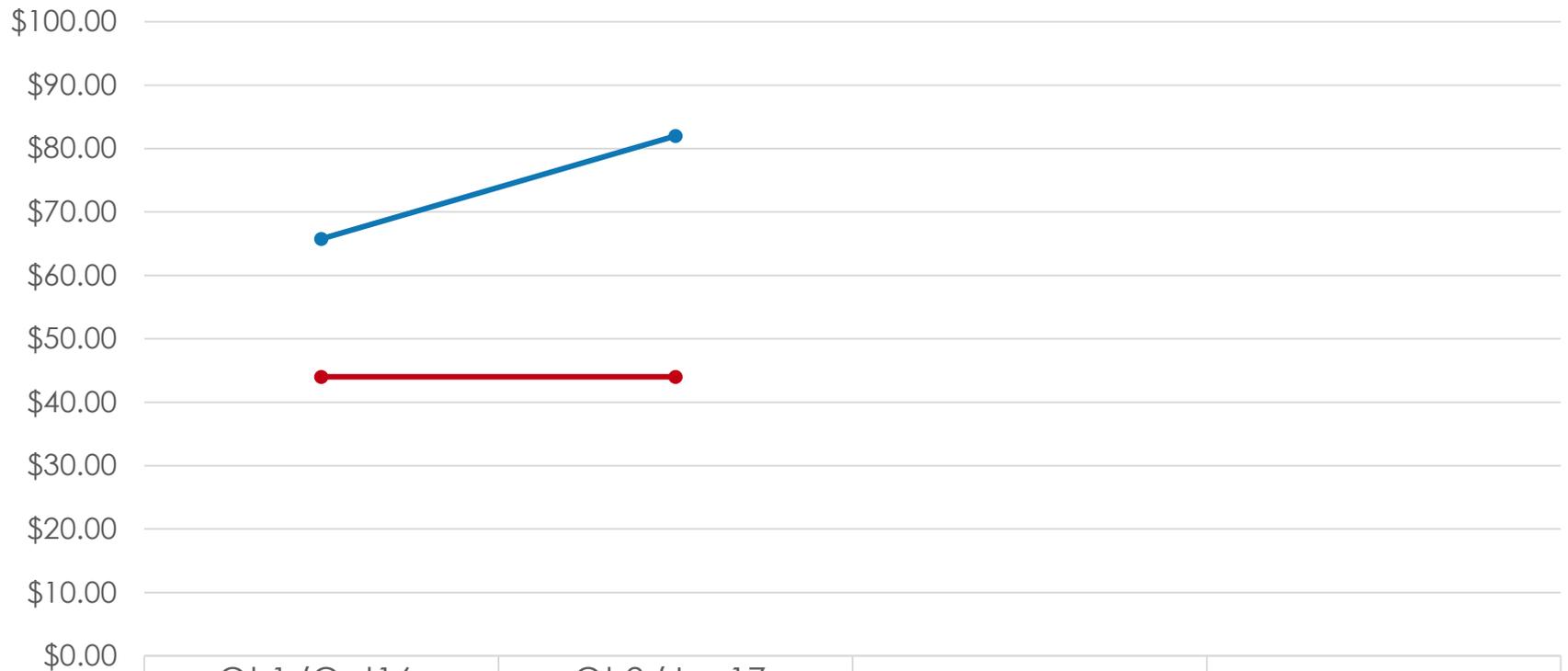
Prepaid- FY2017 Tracking

Food & Beverage in Hotel



Prepaid- FY2017 Tracking

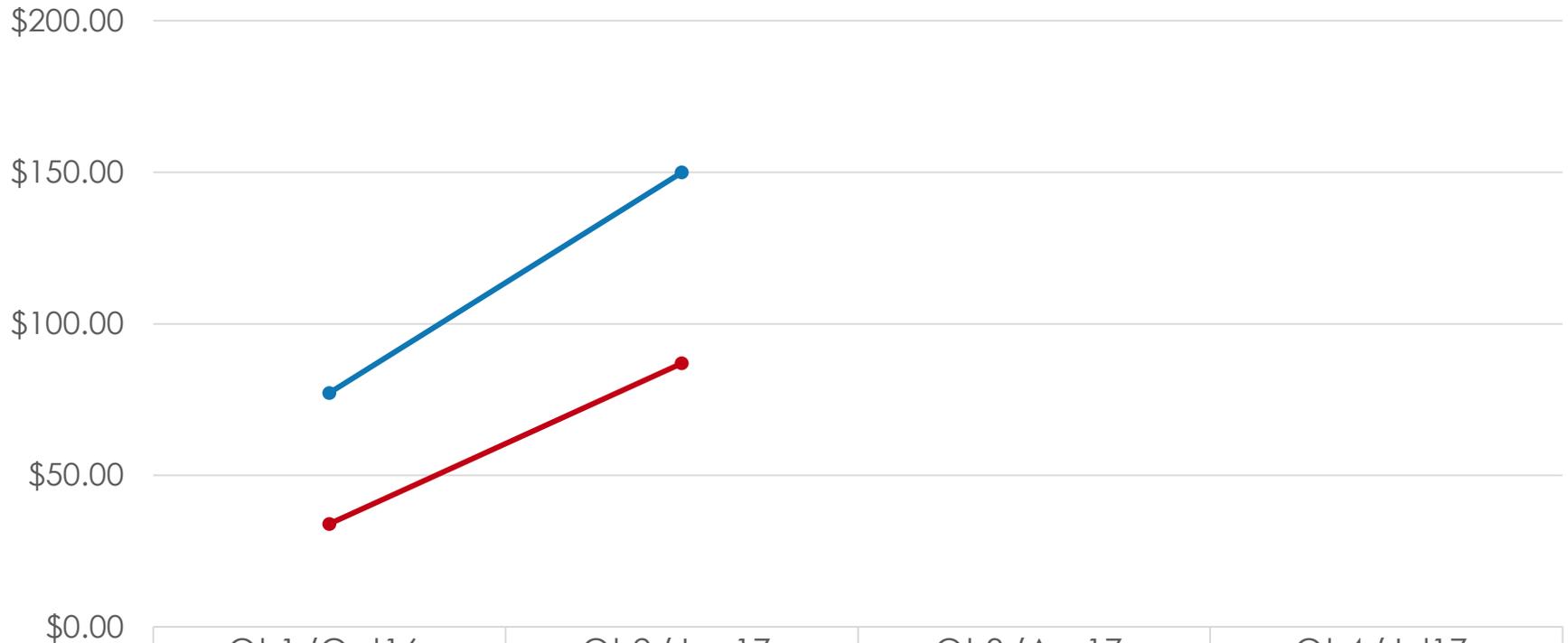
Ground Transportation - Japan



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|------------------------|------------------------|--------------------|---------------------|
| MEAN | \$65.76 | \$81.98 | | |
| MEDIAN | \$44.00 | \$44.00 | | |

Prepaid- FY2017 Tracking

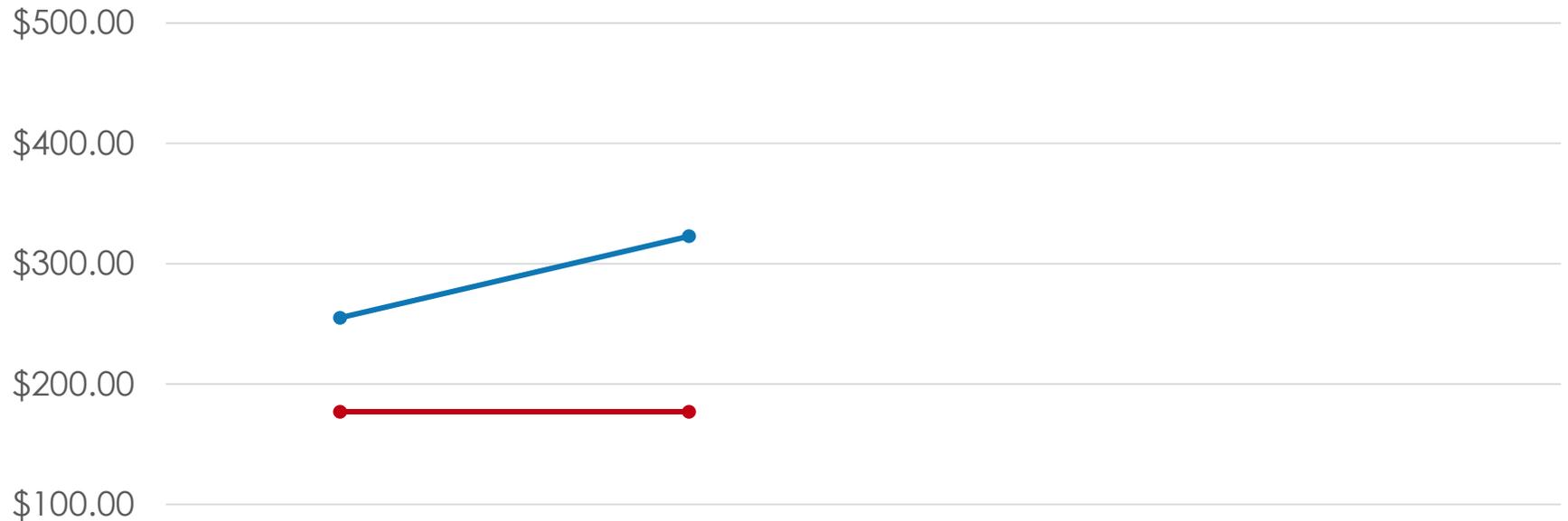
Ground Transportation - Guam



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|--------|------------------------|------------------------|------------------------|-------------------------|
| MEAN | \$77.20 | \$149.98 | | |
| MEDIAN | \$34.00 | \$87.00 | | |

Prepaid– FY2017 Tracking

Optional tours/ Activities

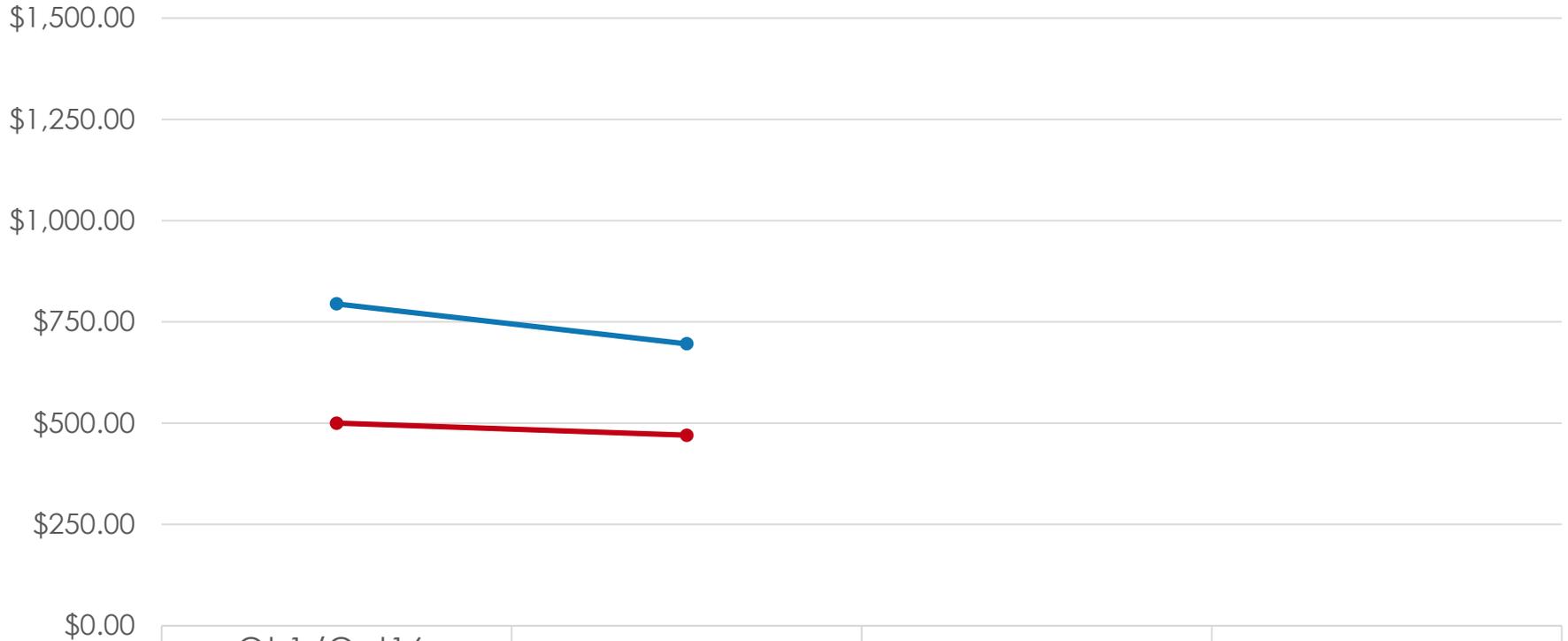


| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|------------|------------------------|------------------------|------------------------|-------------------------|
| —●— MEAN | \$255.10 | \$322.79 | | |
| —●— MEDIAN | \$177.00 | \$177.00 | | |

On-Island Expenditures

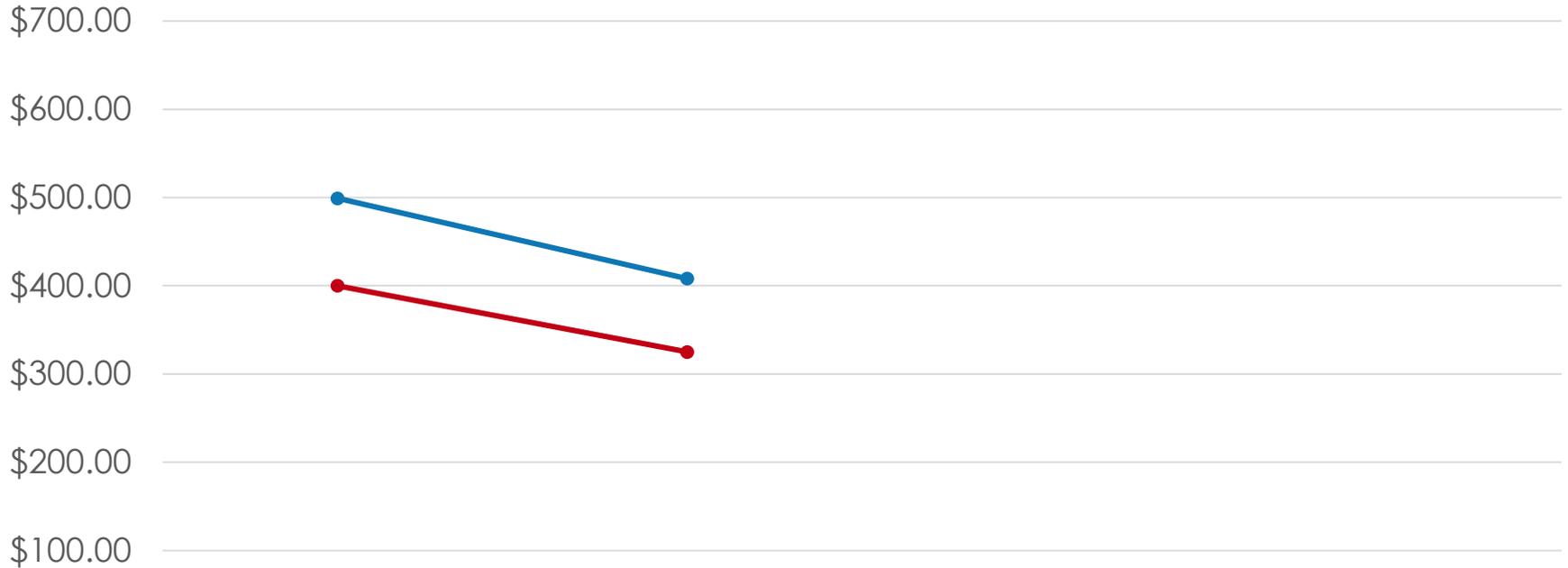
- \$695.95 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$408.15 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017 Tracking



| | Qtr1 (Oct16-Dec16) | Qtr2 (Jan17-Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17-Sept17) |
|--------|--------------------|--------------------|--------------------|---------------------|
| MEAN | \$794.42 | \$695.95 | | |
| MEDIAN | \$500.00 | \$470.00 | | |

On-Island Per Person – FY2017 Tracking



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|--------|------------------------|------------------------|------------------------|-------------------------|
| MEAN | \$499.02 | \$408.15 | | |
| MEDIAN | \$400.00 | \$325.00 | | |

On-Island Per Person – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

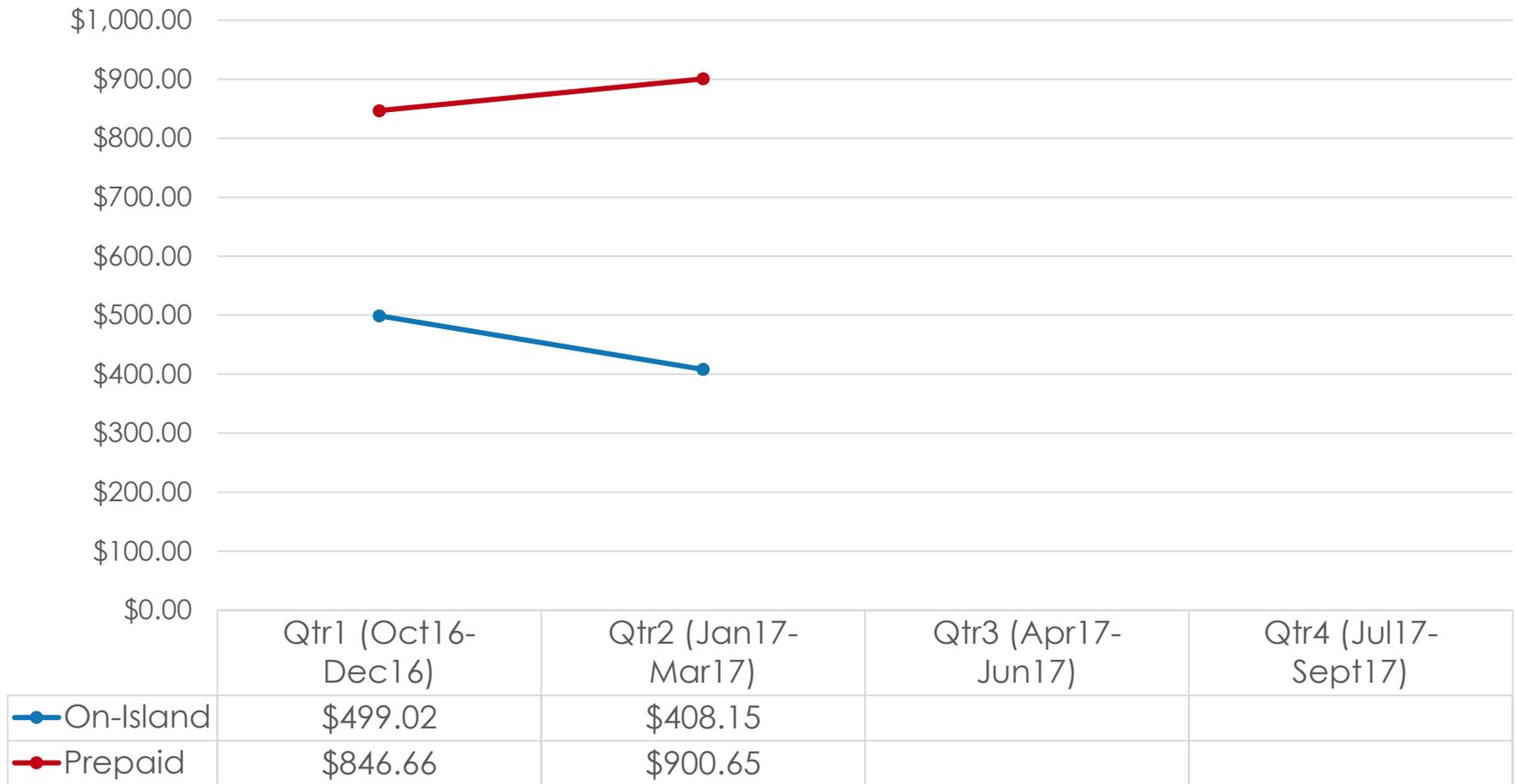
Q11A How much in total did you spend while on Guam during this trip?

PER PERSON

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|-----------|--------|----------|----------|---------------------------|------------|----------|----------|----------|----------|
| | | - | - | - | - | - | - | - | - |
| ONISLE PP | Mean | \$408.15 | \$417.80 | \$434.85 | \$289.05 | \$429.28 | \$407.17 | \$447.26 | \$288.87 |
| | Median | \$325 | \$333 | \$350 | \$260 | \$317 | \$267 | \$350 | \$209 |

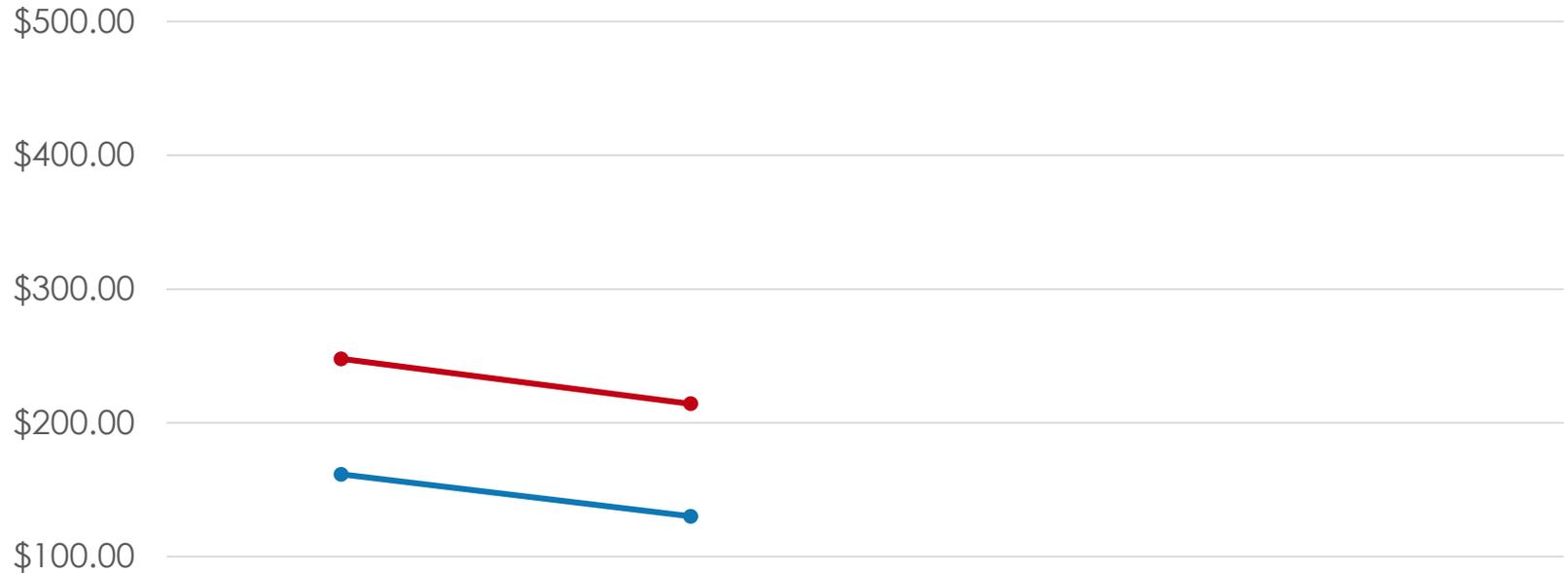
Prepared by QMark Research

Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



On-Island Per Day Spending – FY2017 Tracking

MEAN



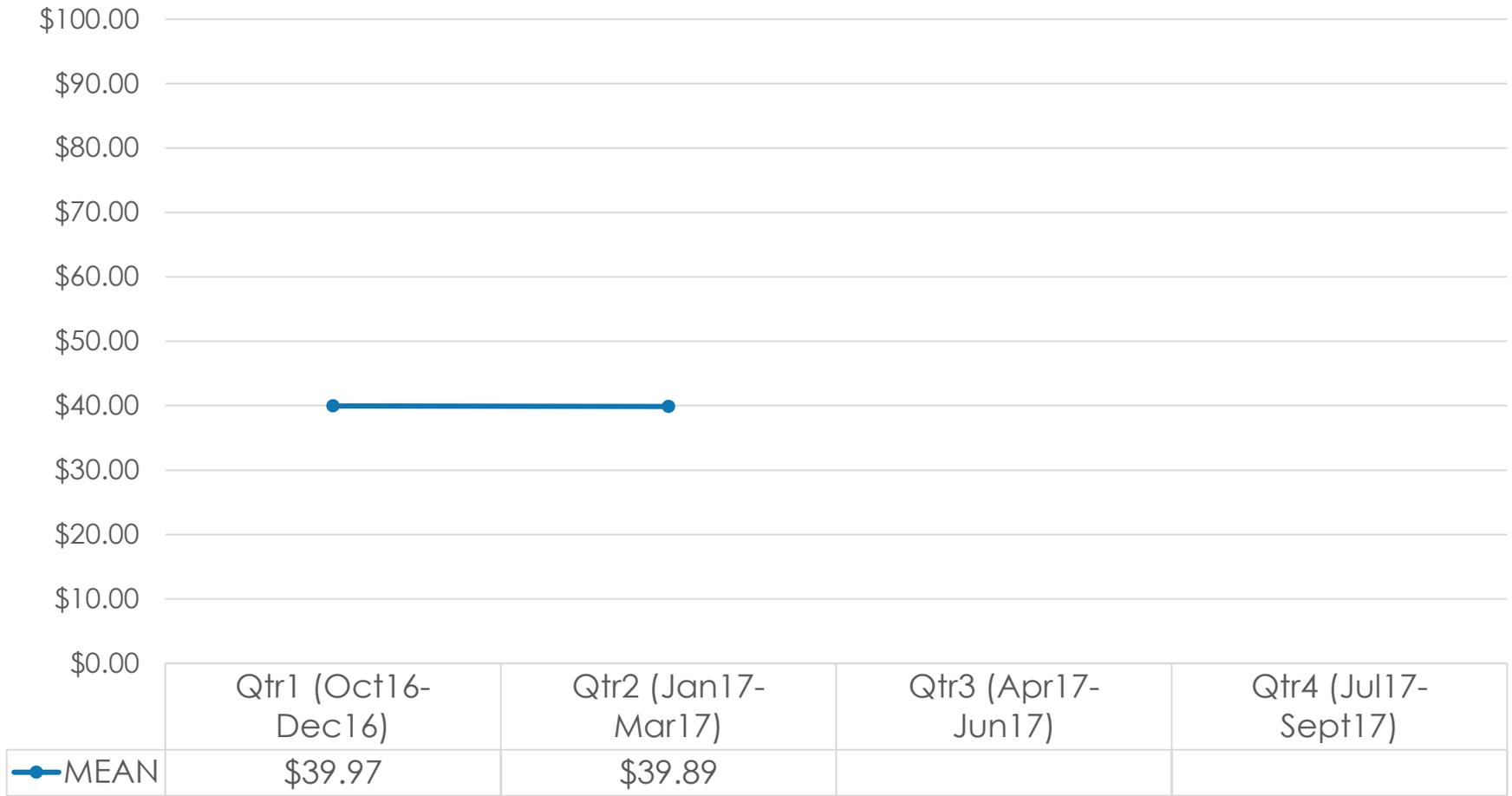
| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17- Jun17) | Qtr4 (Jul17- Sept17) |
|--------------|------------------------|------------------------|------------------------|-------------------------|
| Per Person | \$161.51 | \$130.08 | | |
| Travel Party | \$247.75 | \$214.17 | | |

On-Island Expenses by Category – MEAN Entire Travel Party



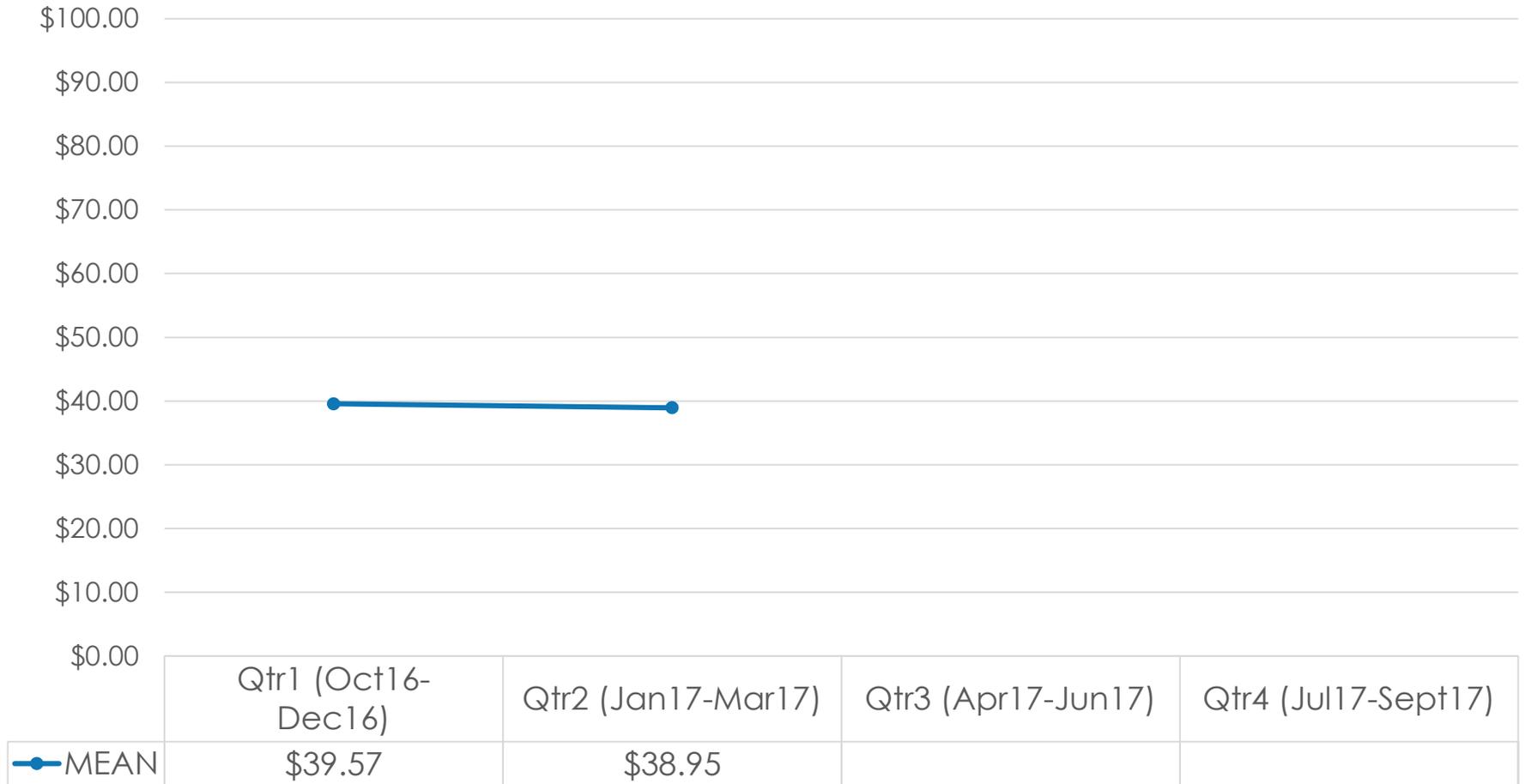
On-Island – FY2017 Tracking

Food & Beverage - Hotel



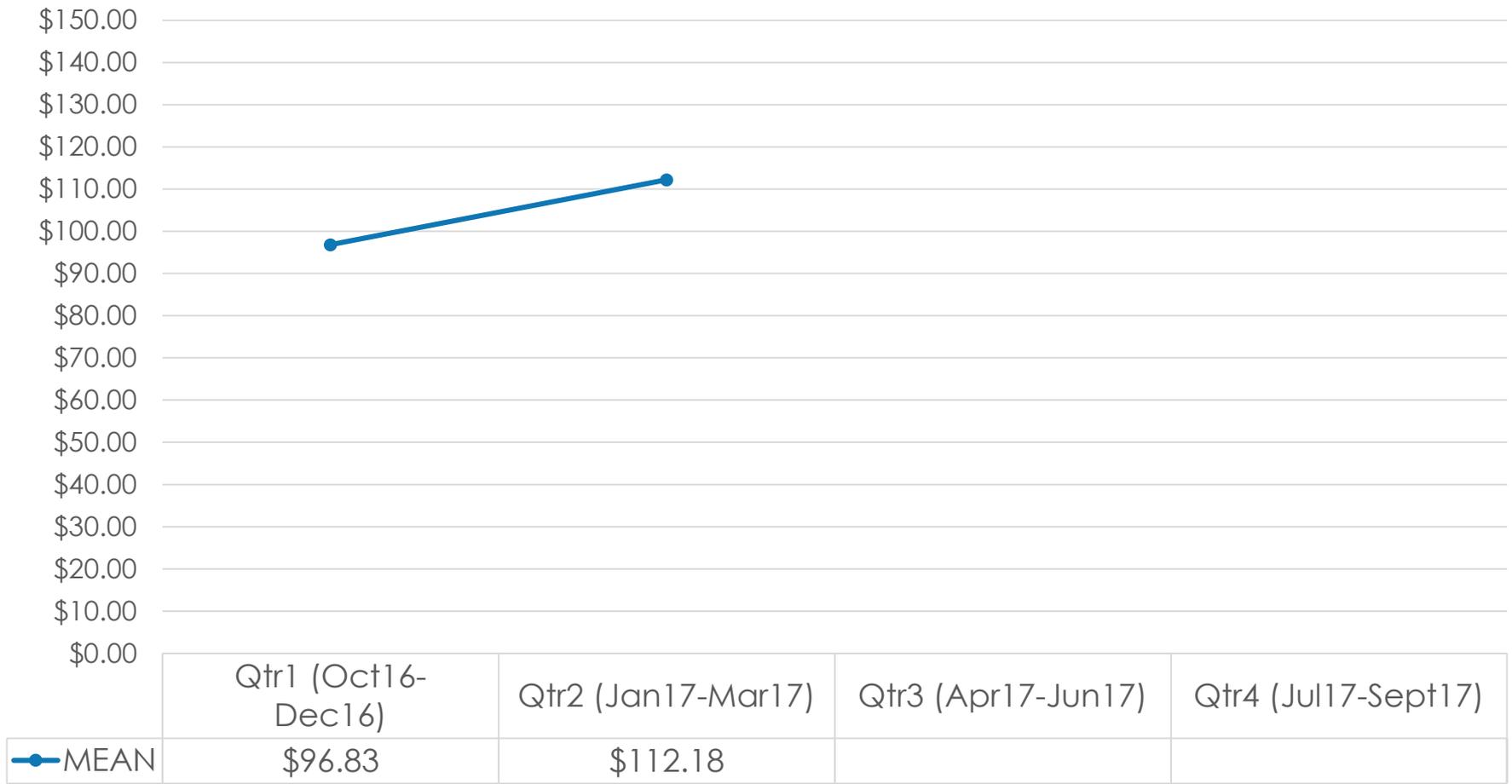
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



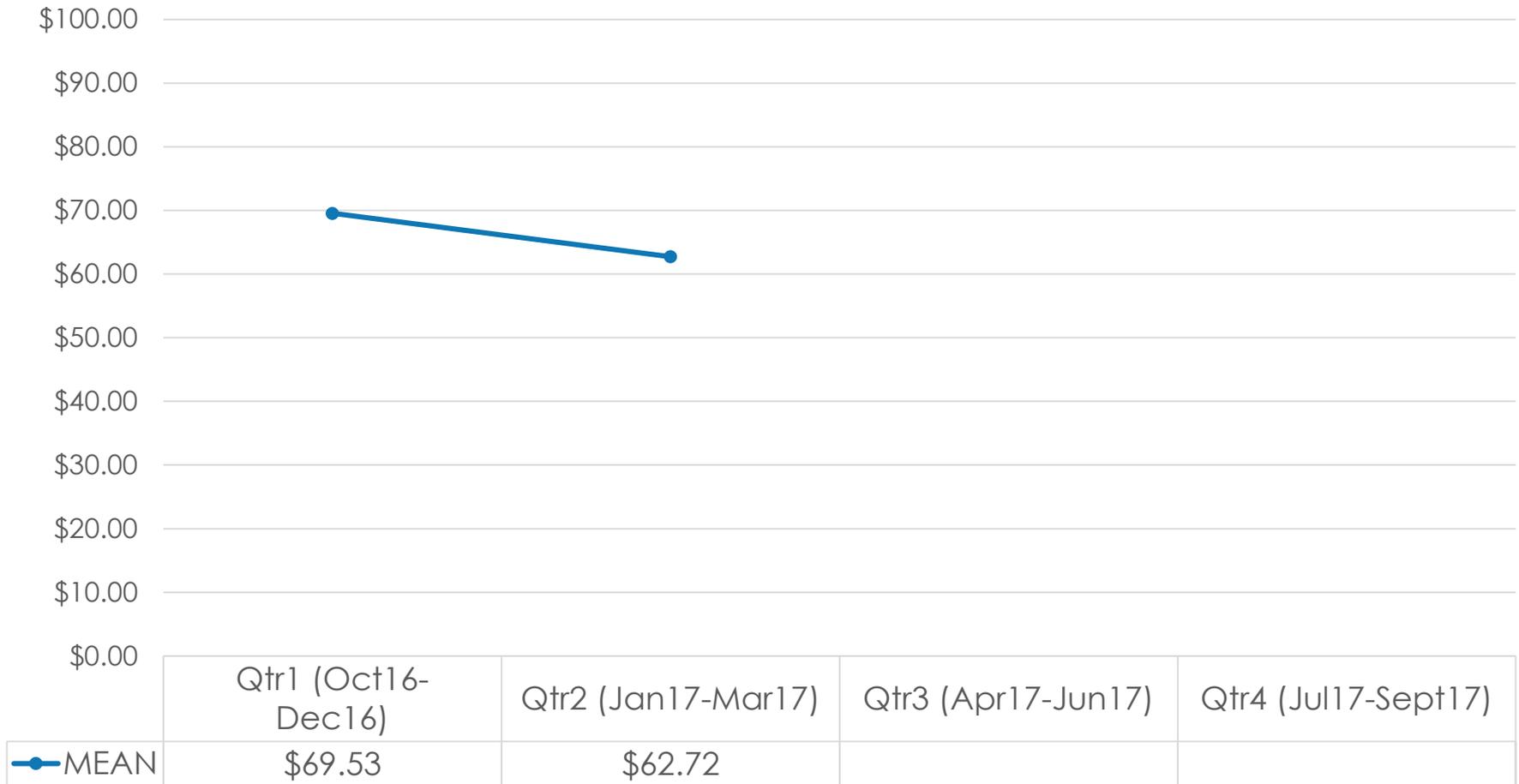
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



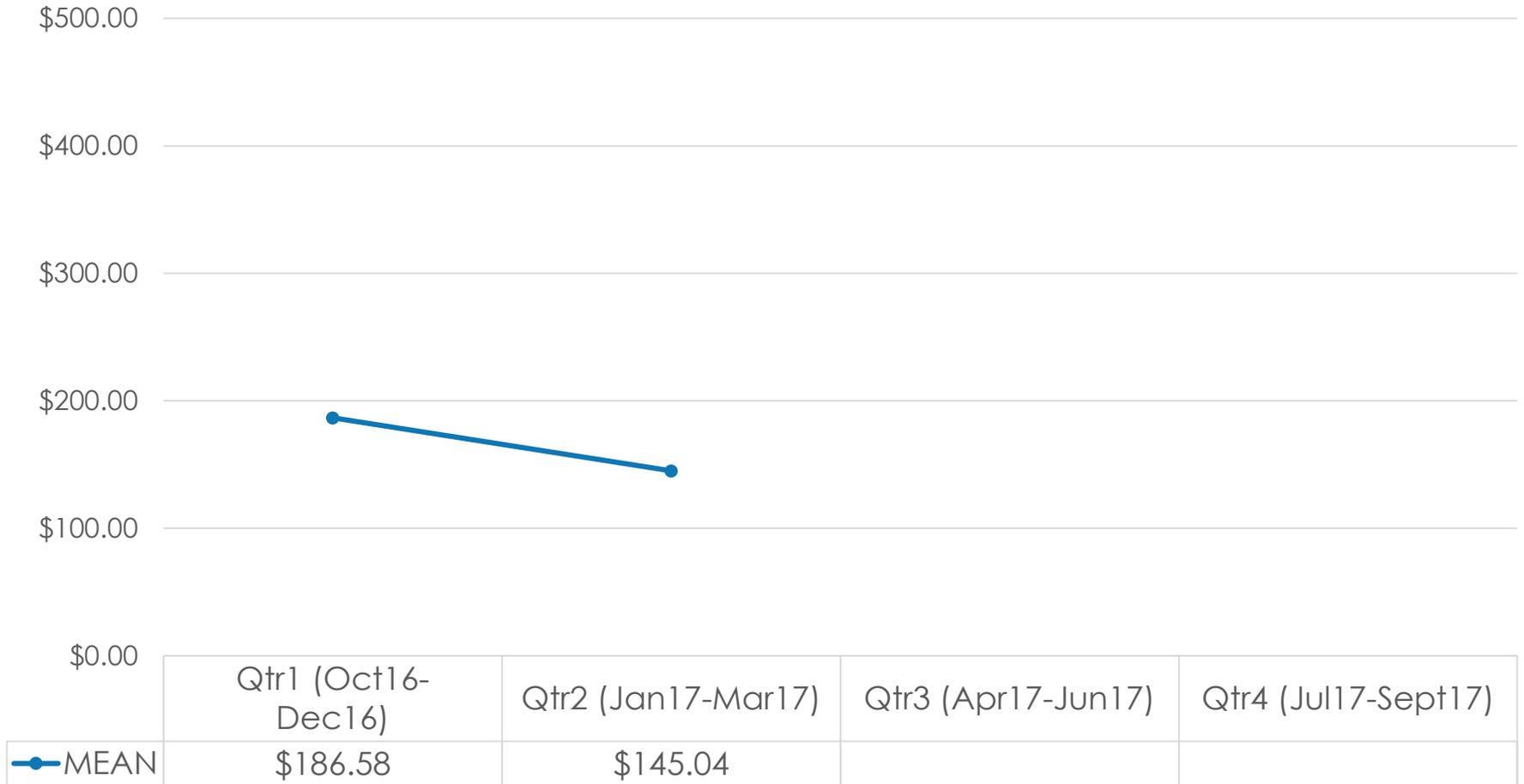
On-Island – FY2017 Tracking

Optional tour/ Activities



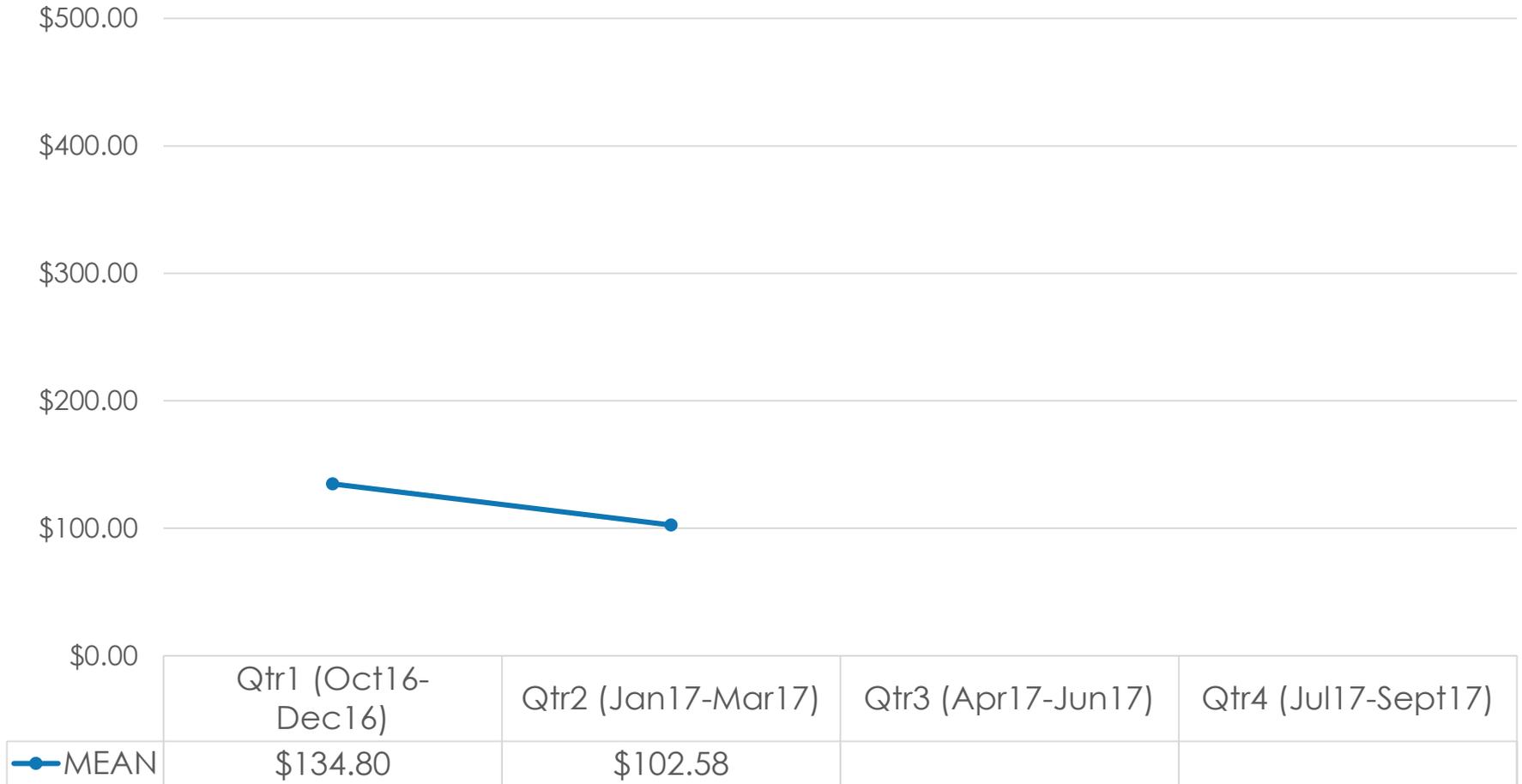
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



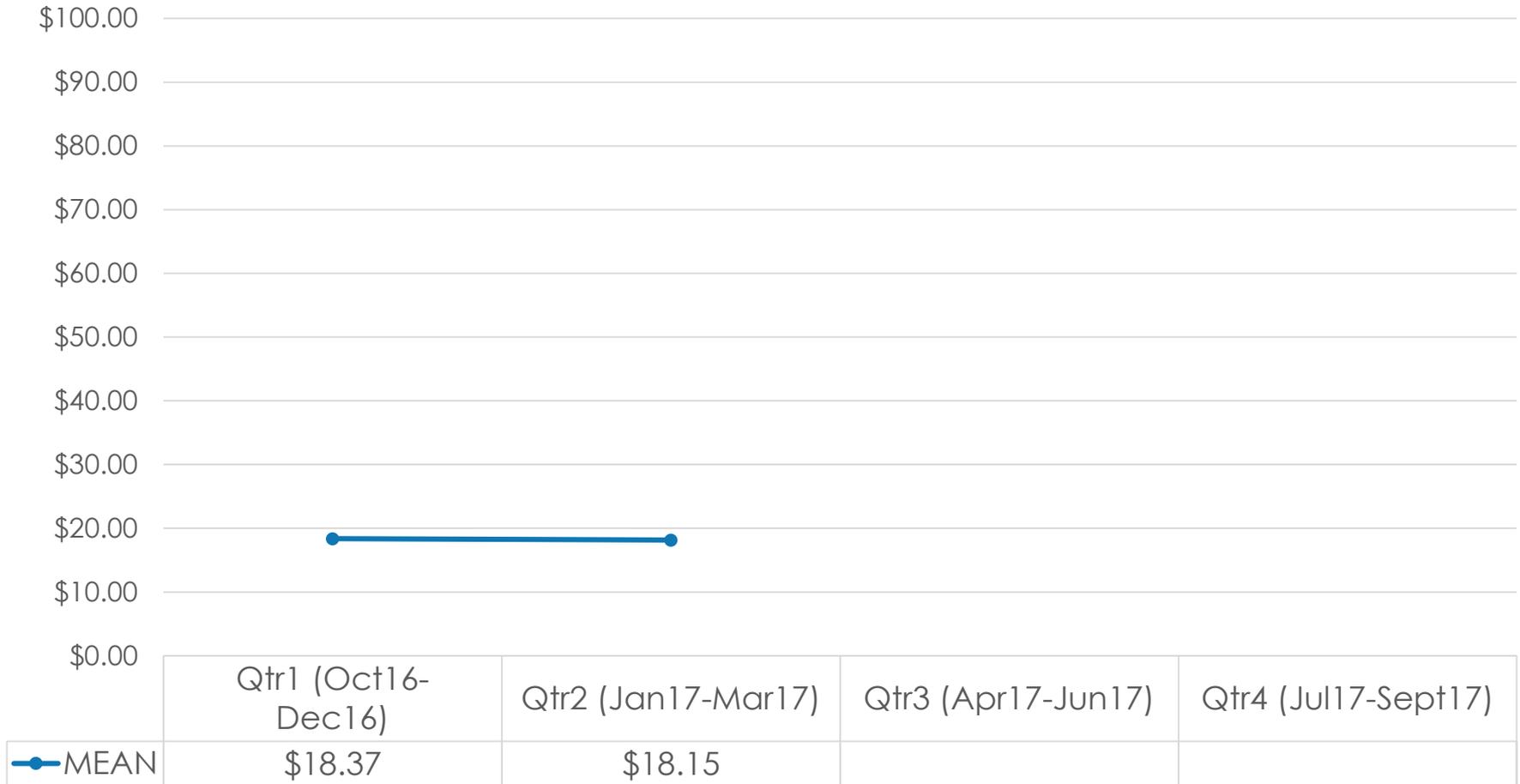
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



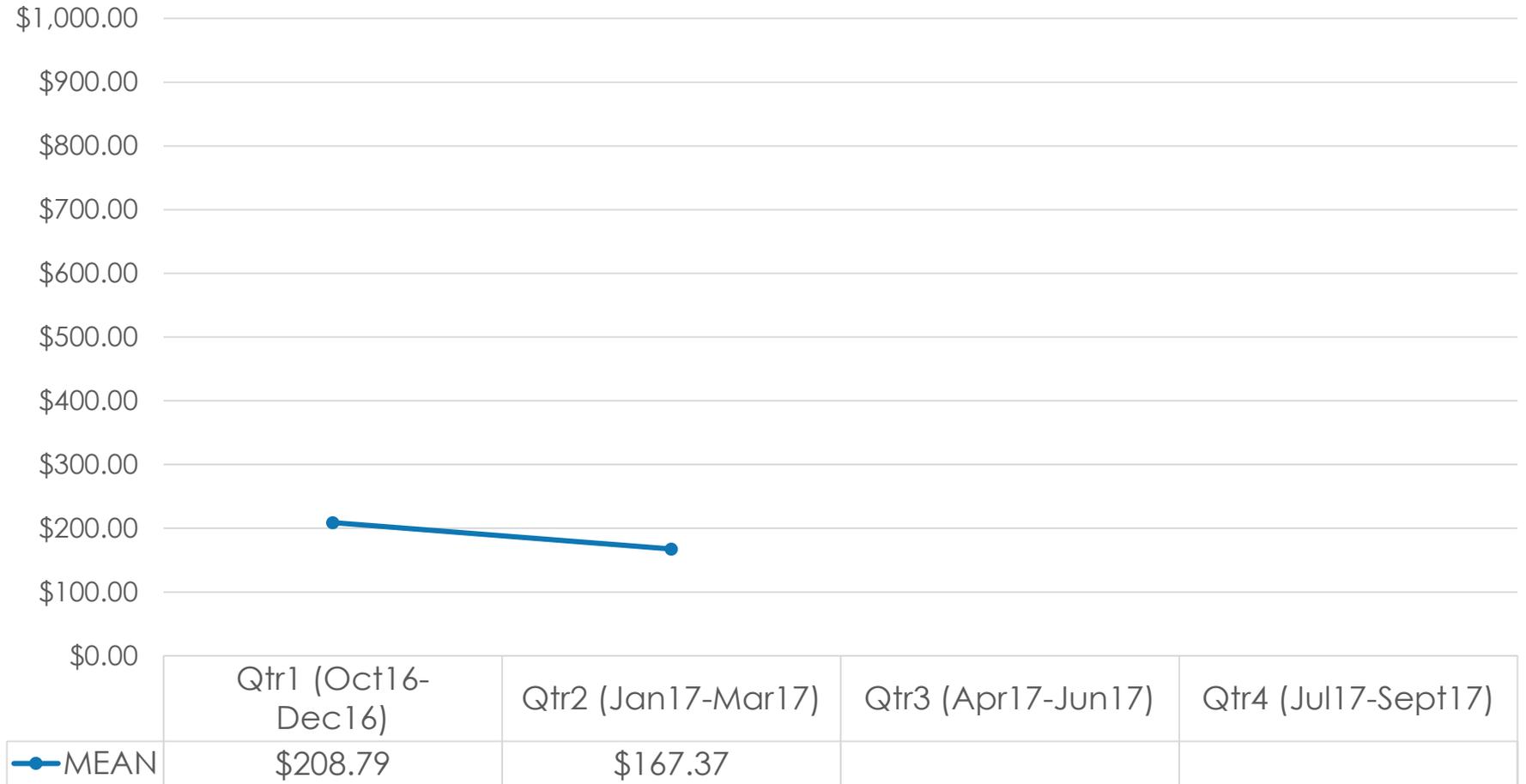
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

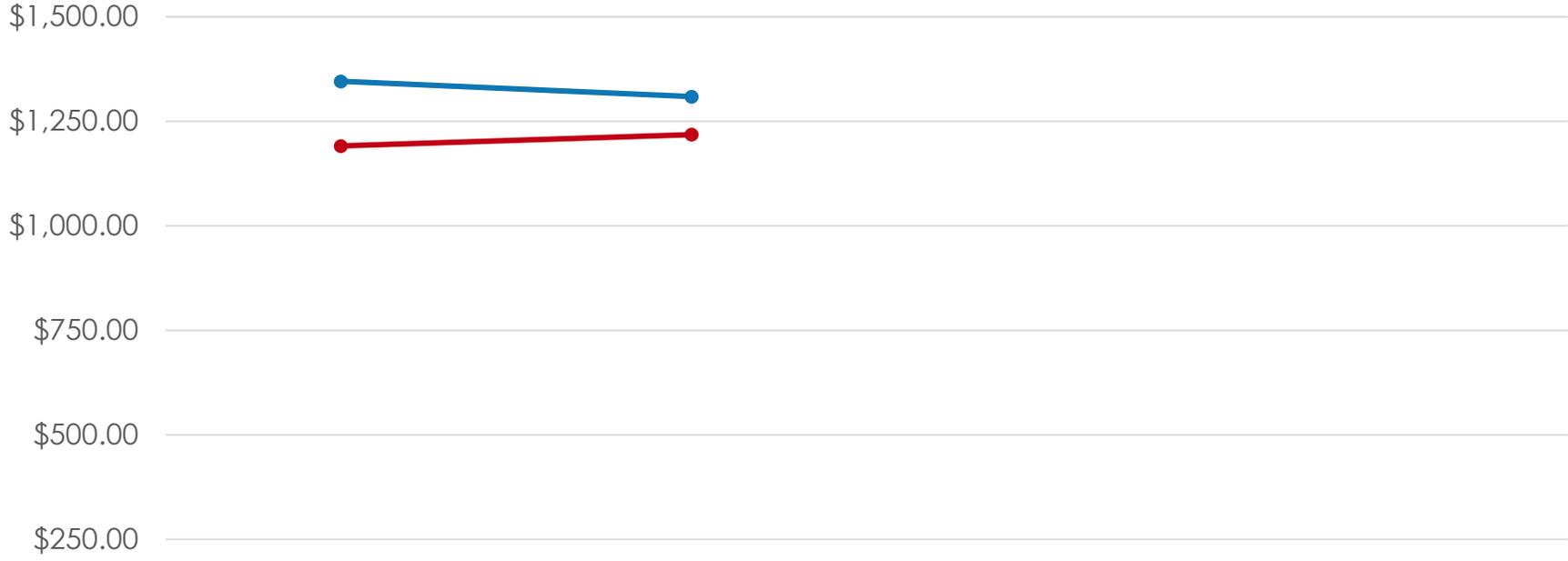
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,308.80 = overall mean average prepaid & on-isle expense by respondent

TOTAL Per Person Expenditures – FY2017 Tracking



| | Qtr1 (Oct16- Dec16) | Qtr2 (Jan17- Mar17) | Qtr3 (Apr17-Jun17) | Qtr4 (Jul17- Sept17) |
|----------|------------------------|------------------------|--------------------|-------------------------|
| ● MEAN | \$1,345.50 | \$1,308.80 | | |
| ● MEDIAN | \$1,191.00 | \$1,218.00 | | |

TOTAL Per Person Expenditures – Key Segments

GUAM VISITORS BUREAU - EXIT SURVEY

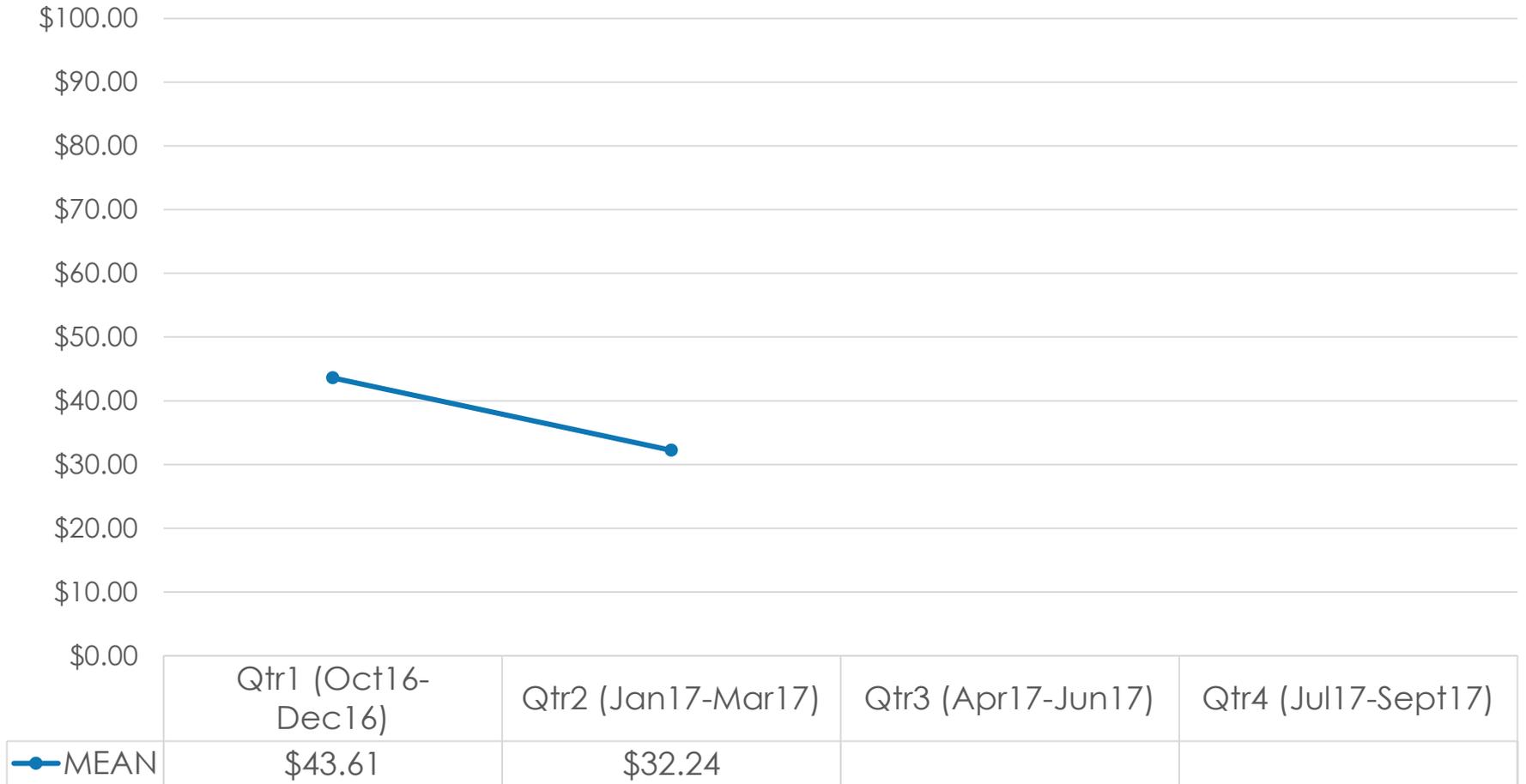
TOTAL EXPENDITURES (On-Isle / Prepaid)

PER PERSON

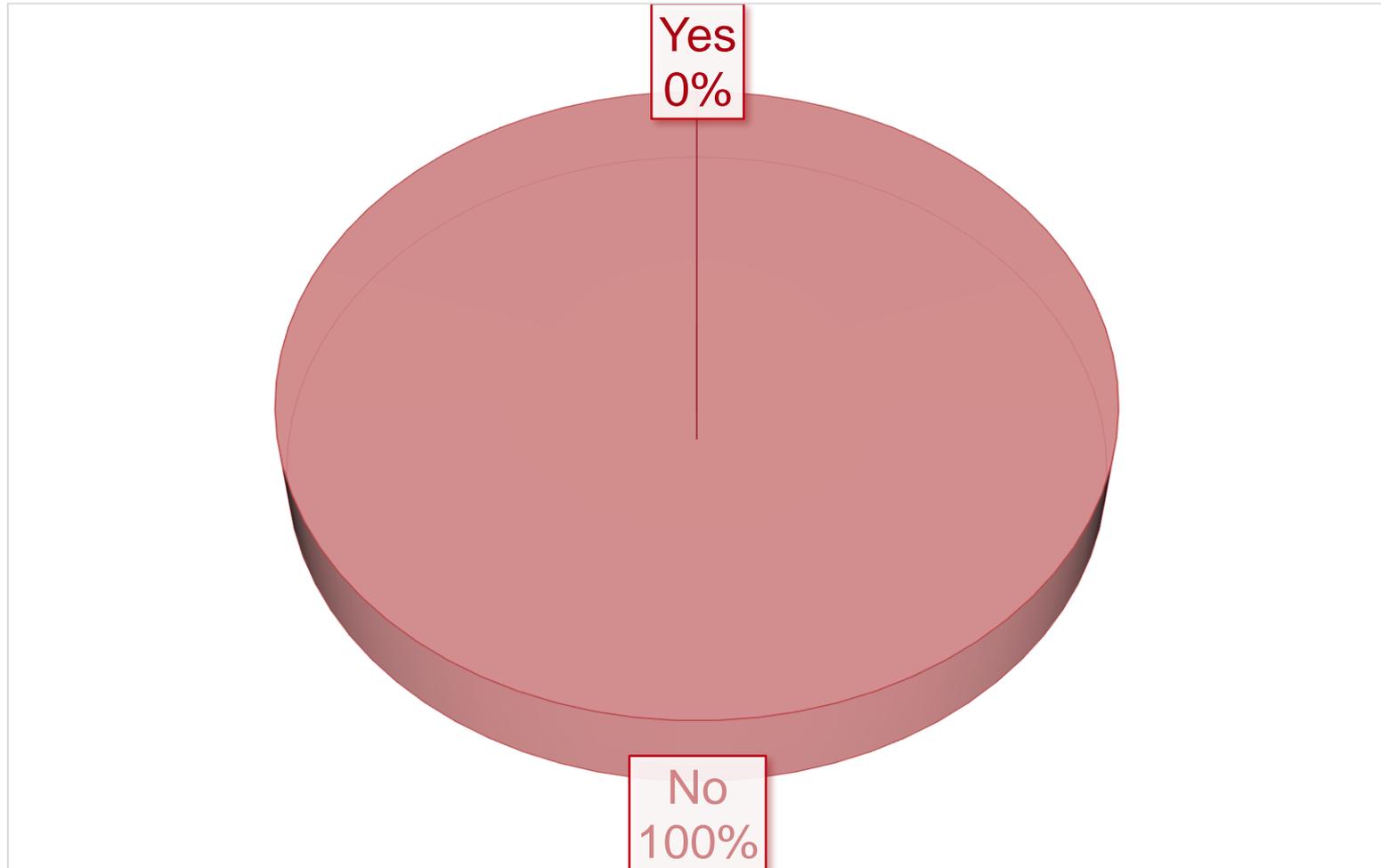
| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----------|--------|------------|------------|---------------------------|------------|------------|------------|------------|----------|
| | | - | - | - | - | - | - | - | - |
| TOTAL PP | Mean | \$1,308.80 | \$1,486.28 | \$1,318.58 | \$804.50 | \$1,504.68 | \$1,687.41 | \$1,340.79 | \$653.03 |
| | Median | \$1,218 | \$1,369 | \$1,283 | \$735 | \$1,384 | \$1,384 | \$1,225 | \$440 |

Prepared by QMark Research

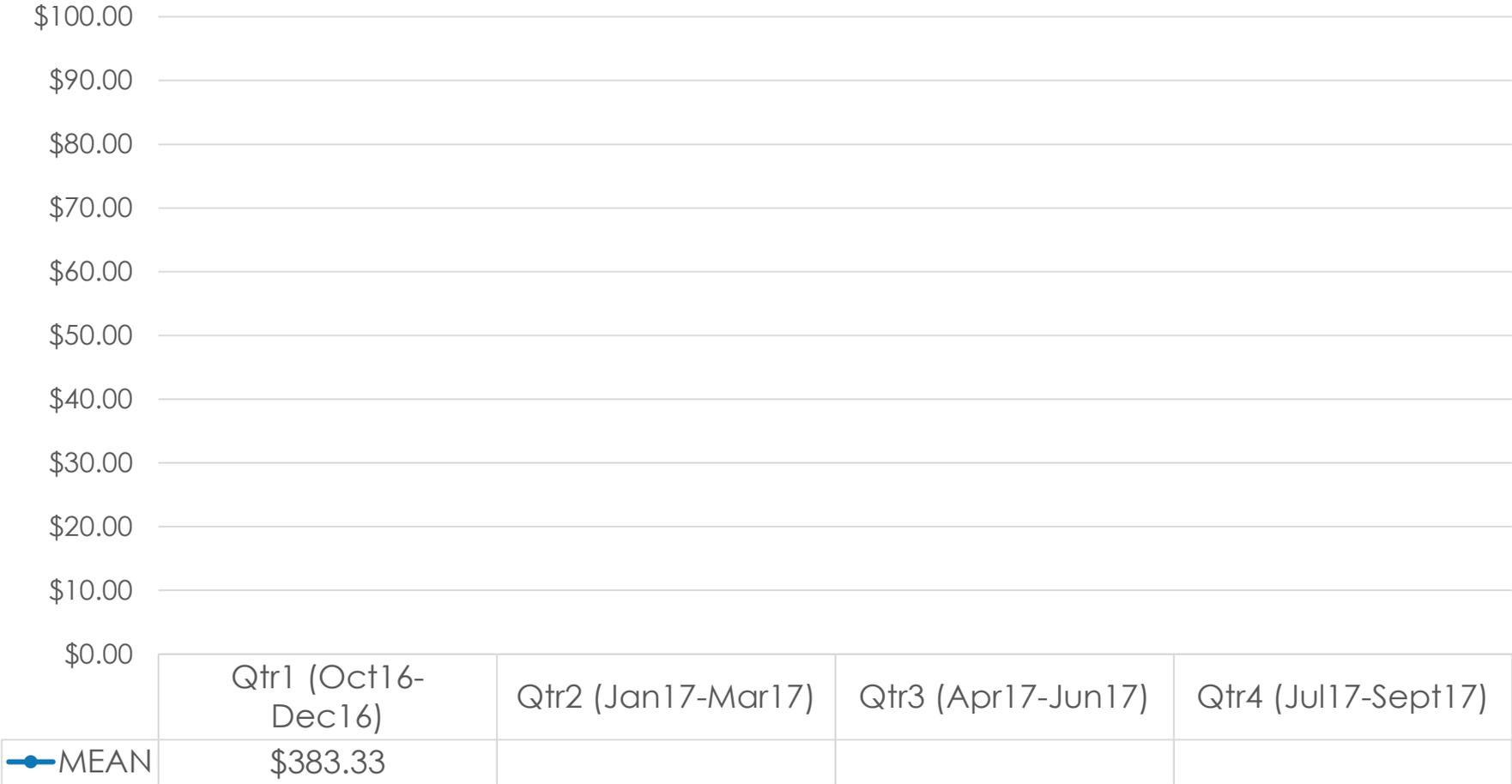
GUAM AIRPORT EXPENDITURE – FY2017 Tracking



PARTICIPATED IN SHOP GUAM e-FESTIVAL



SHOP GUAM E-FESTIVAL SPENDING – FY2017 Tracking

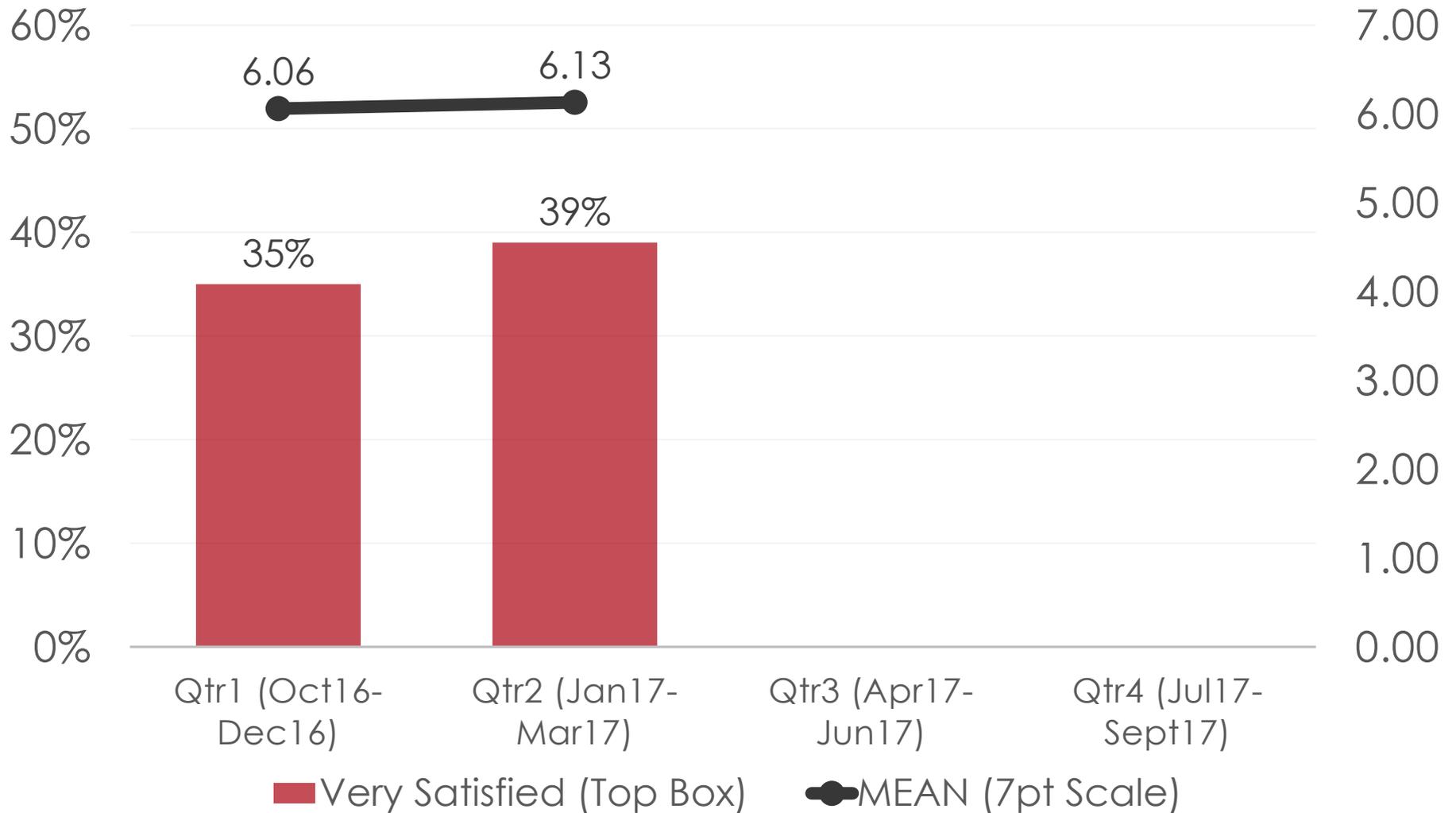


SECTION 4

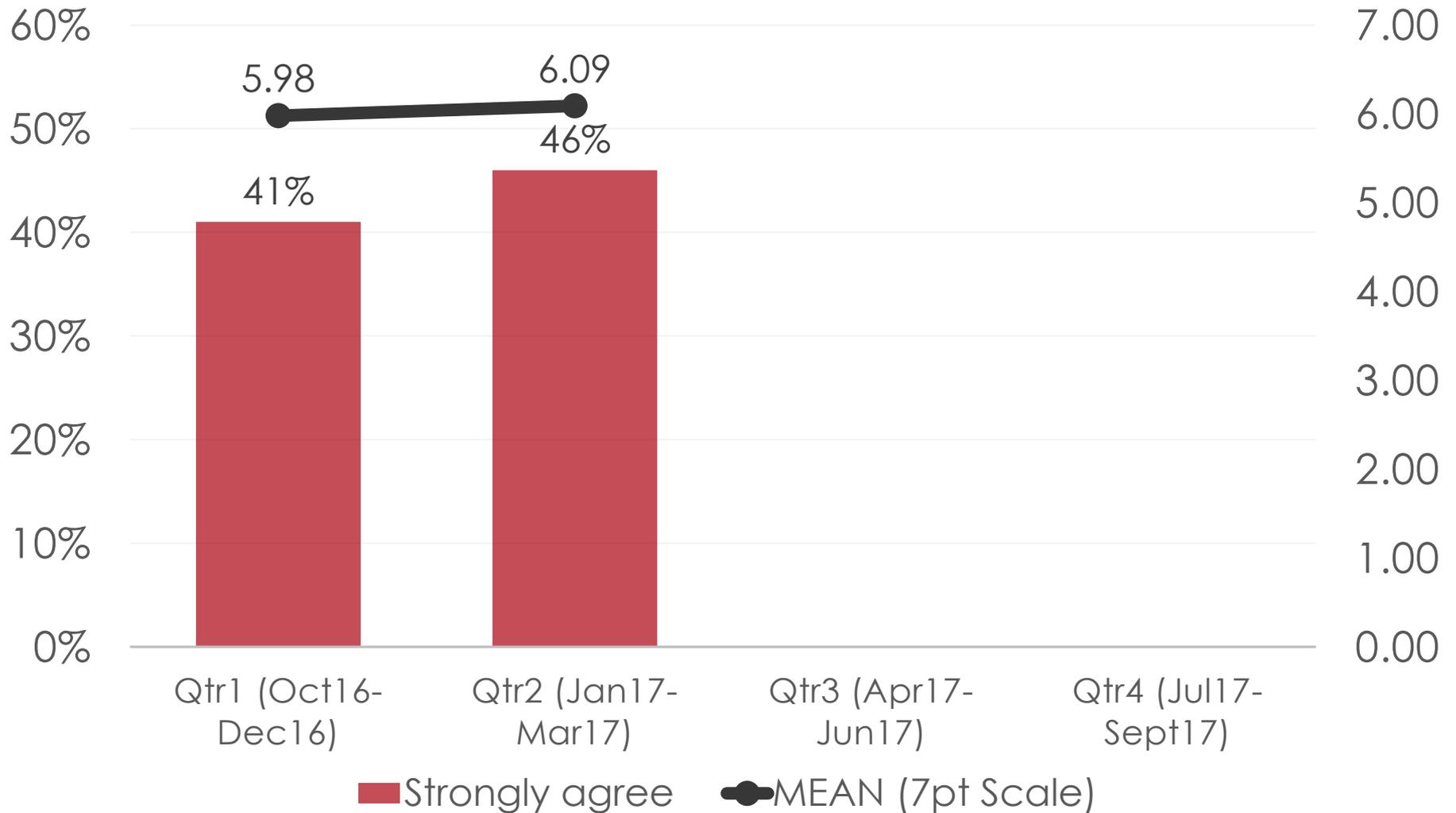
VISITOR SATISFACTION

BEHAVIOR

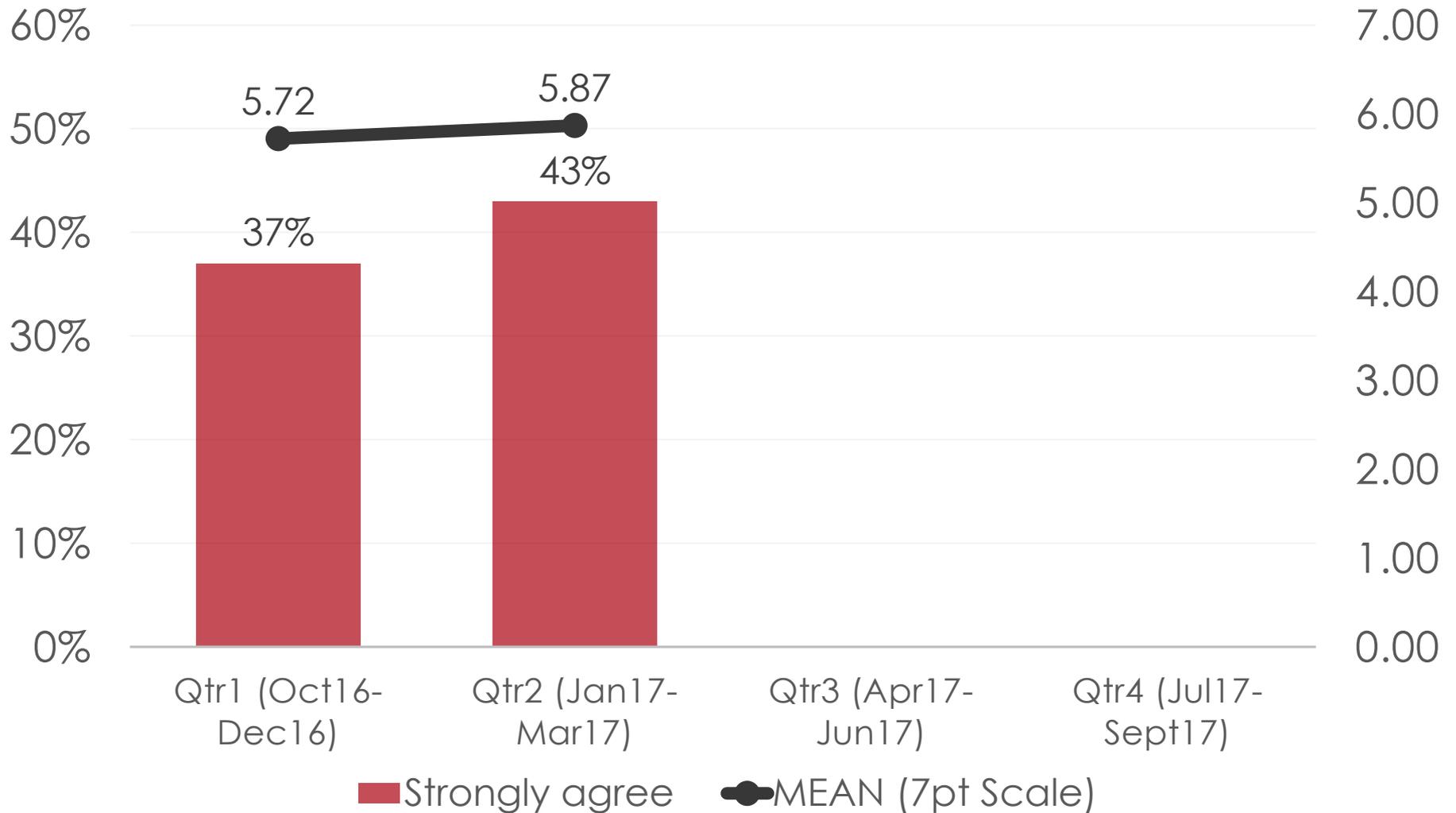
OVERALL SATISFACTION



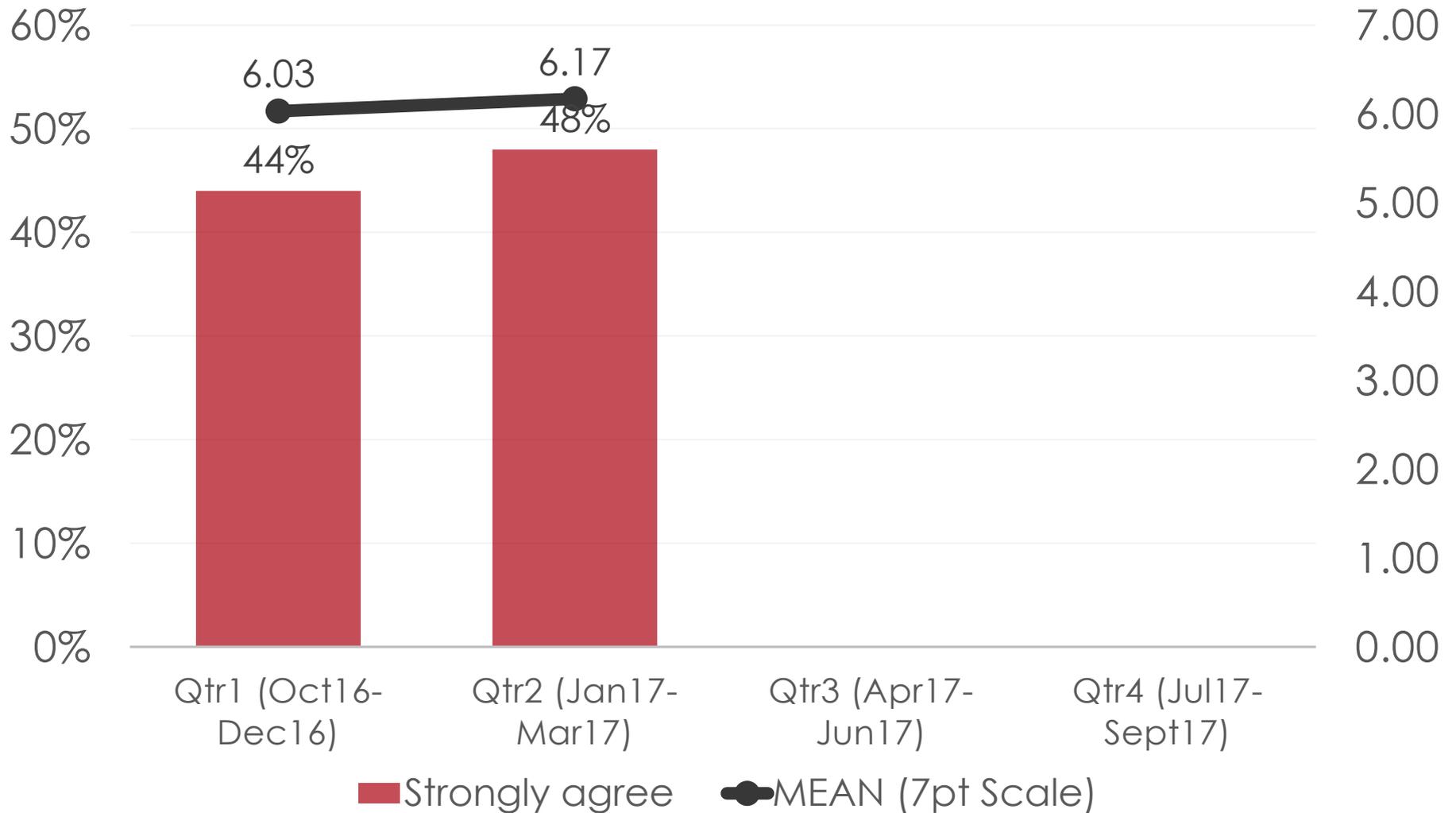
Guam was better than expected



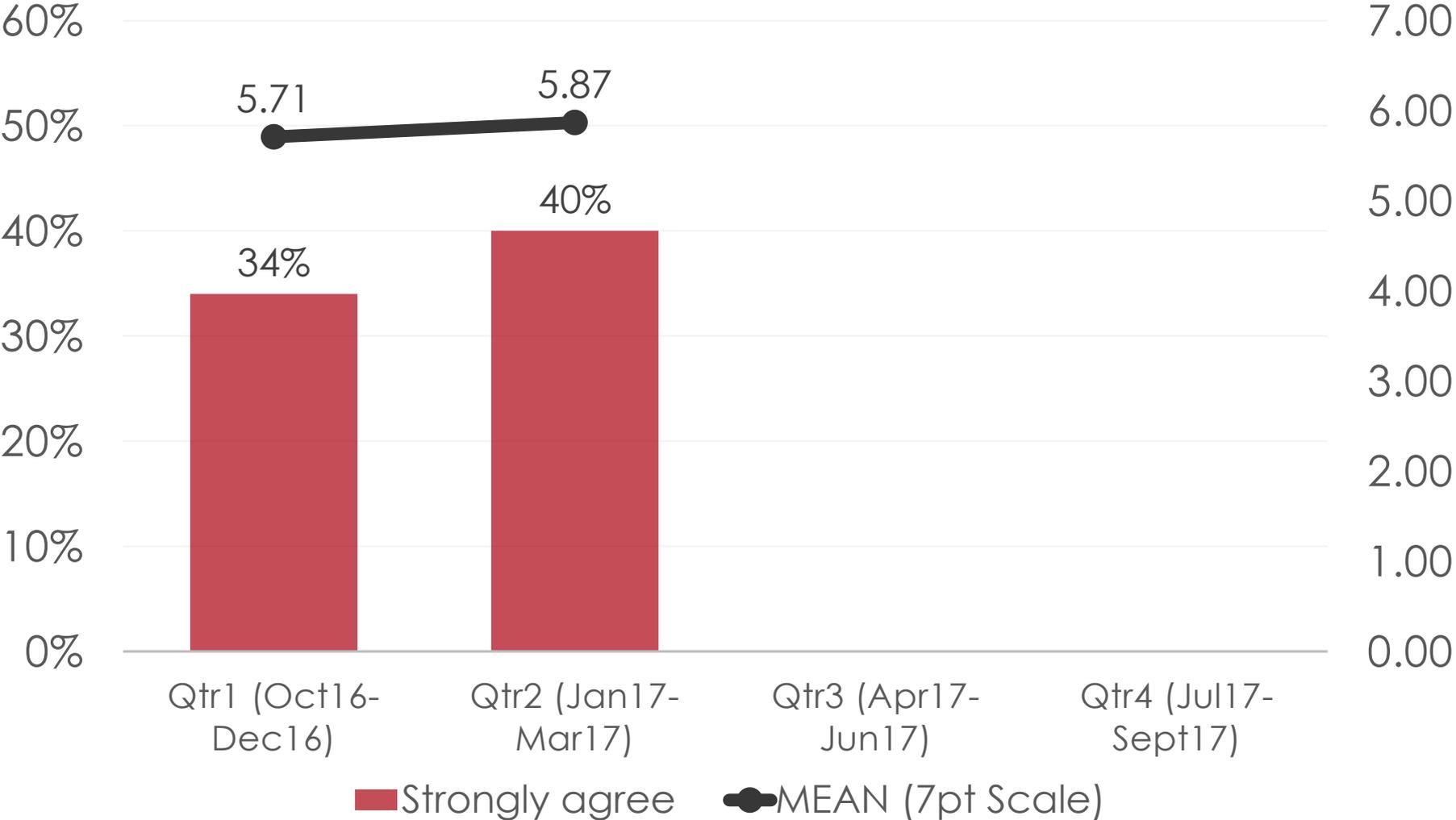
I had no communication problems



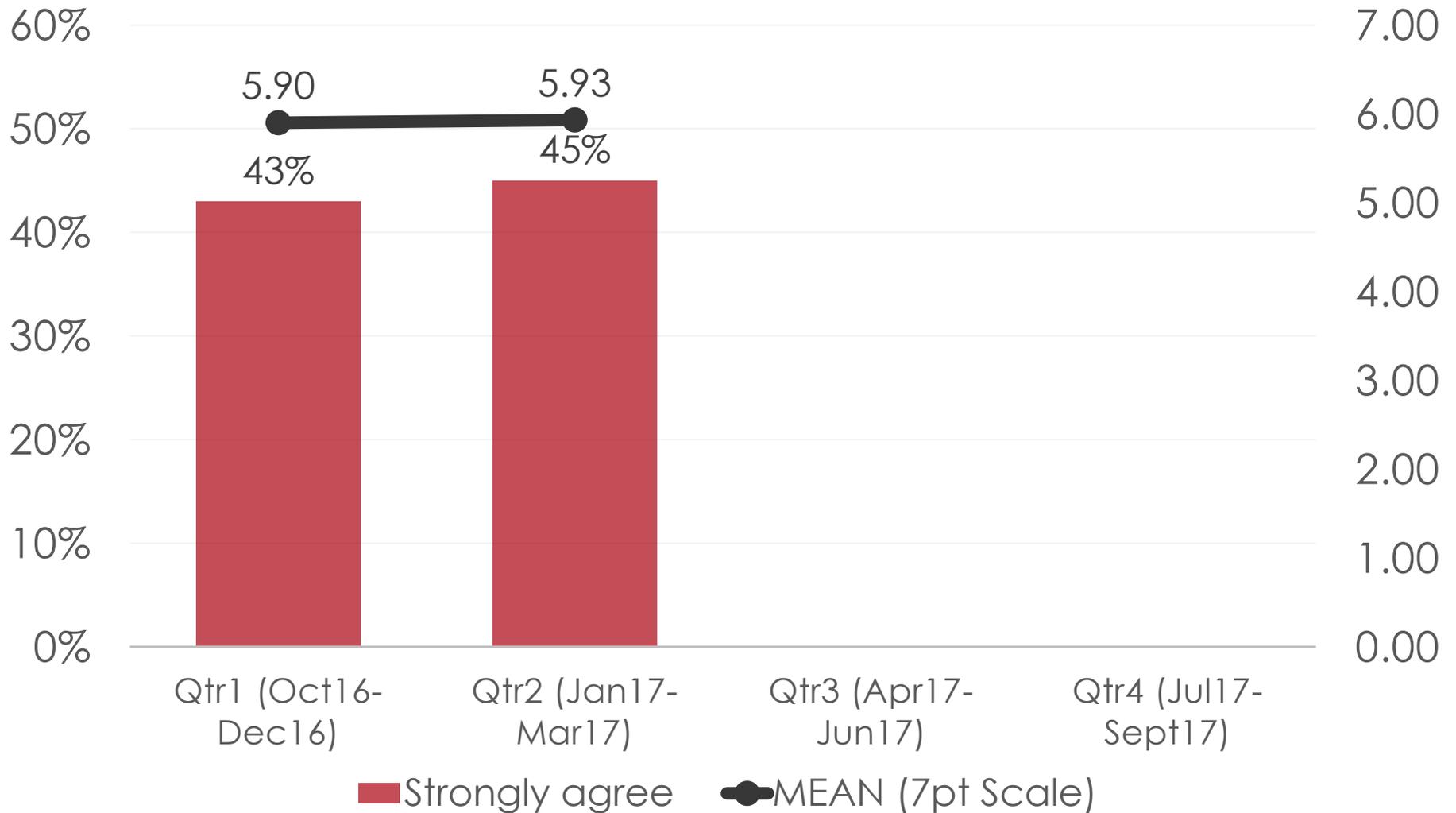
I will recommend Guam to friends



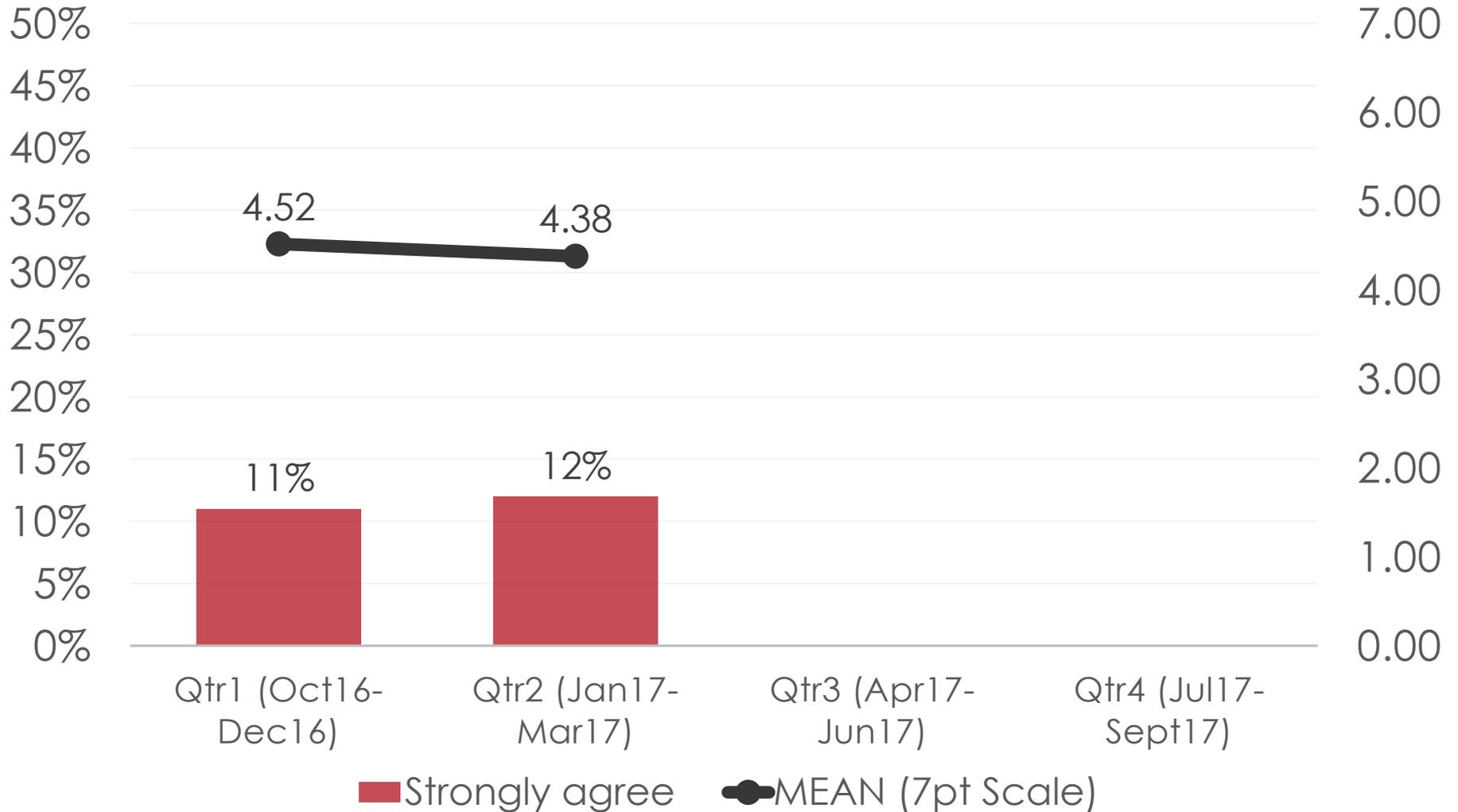
Sites on Guam were attractive



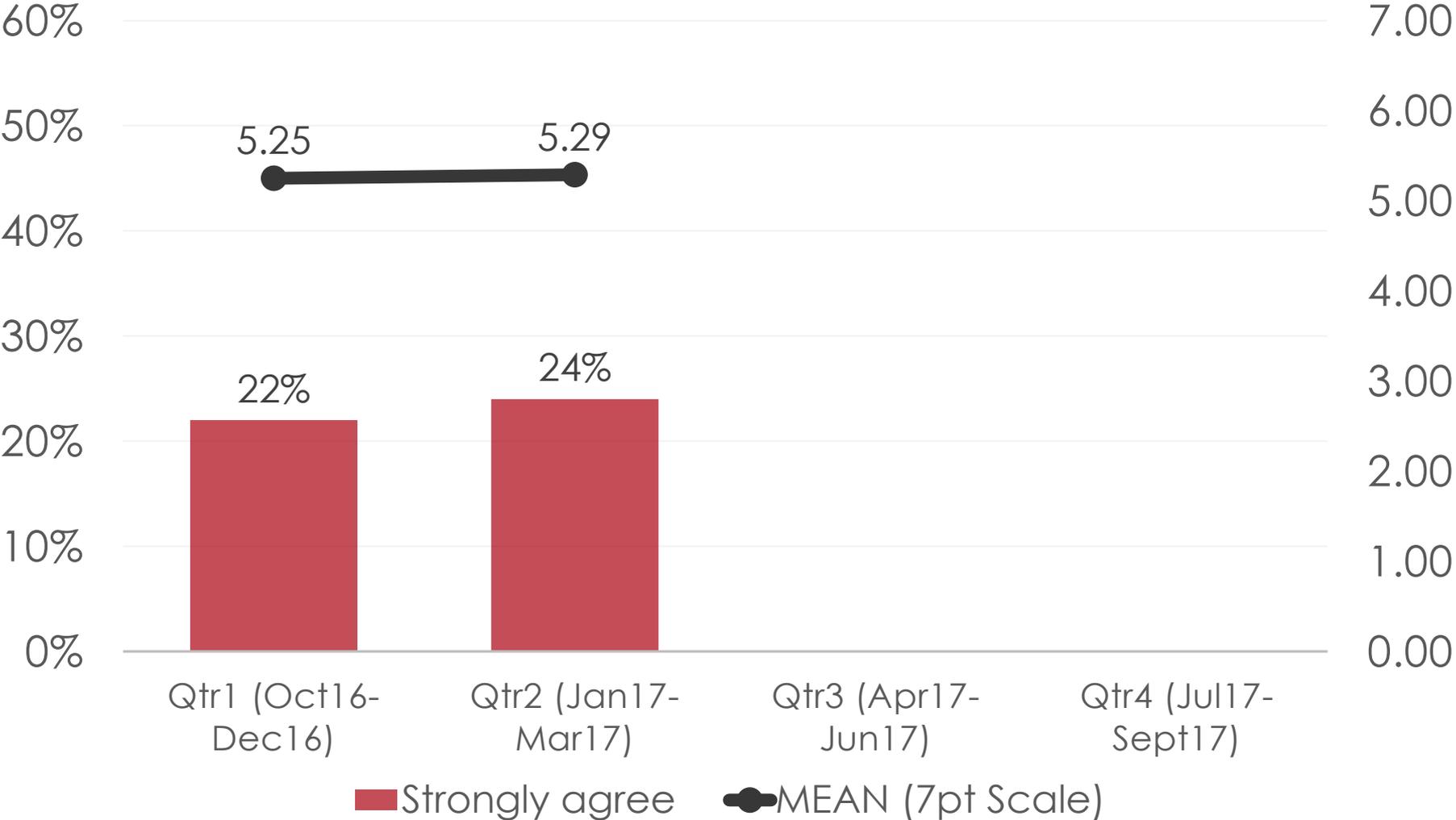
I plan to visit Guam again



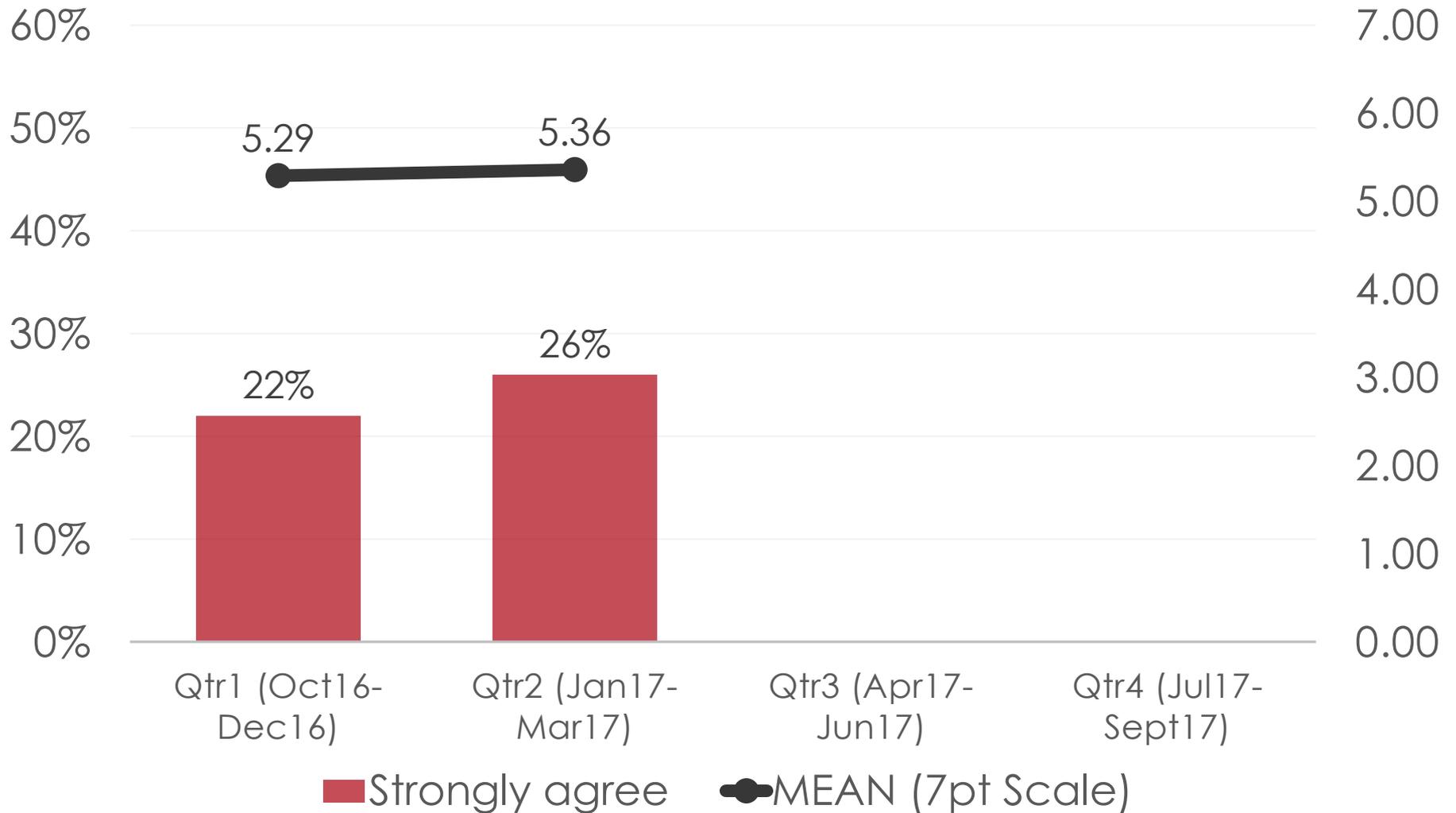
Not enough night time activities



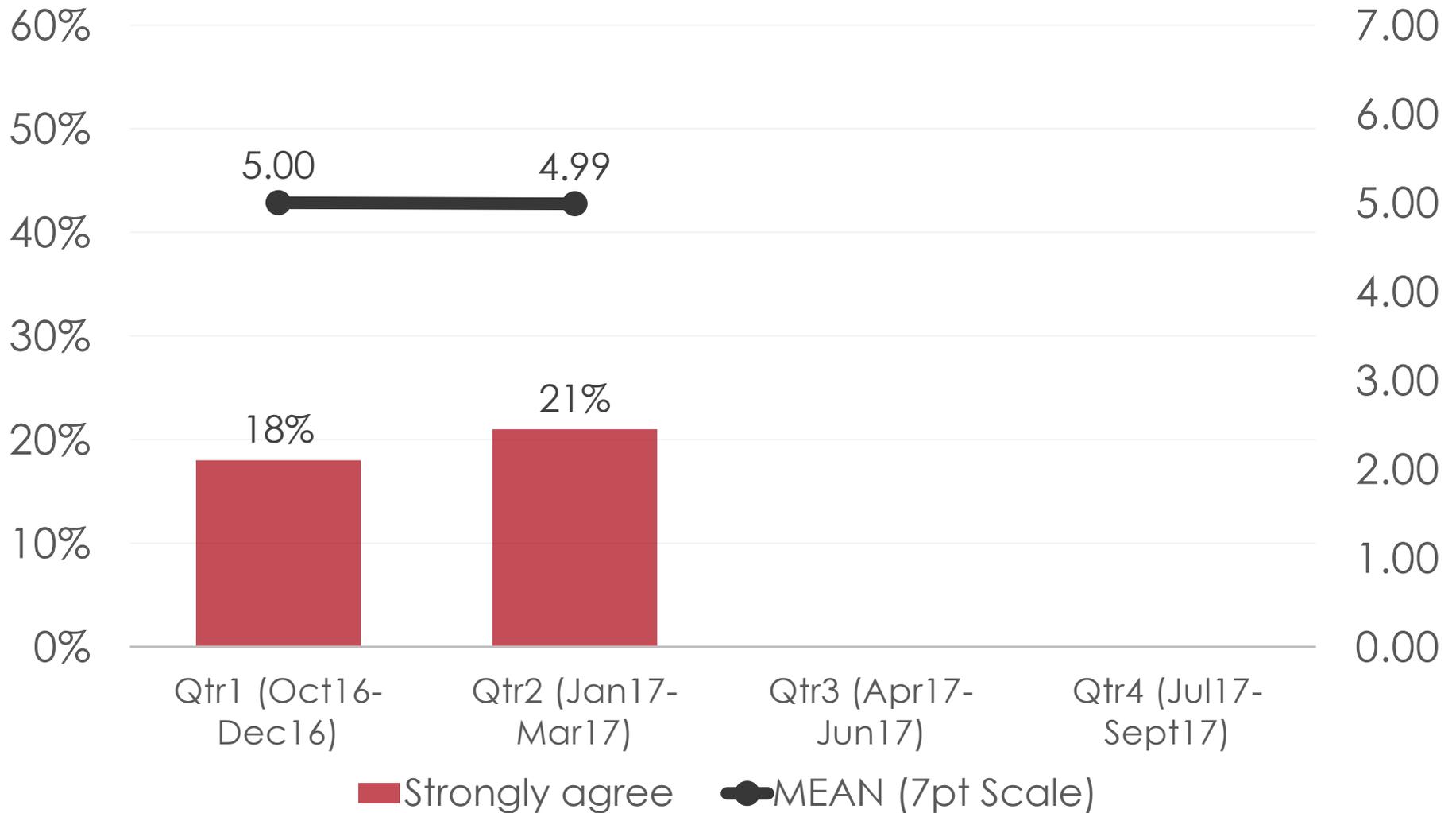
Tour guides were professional



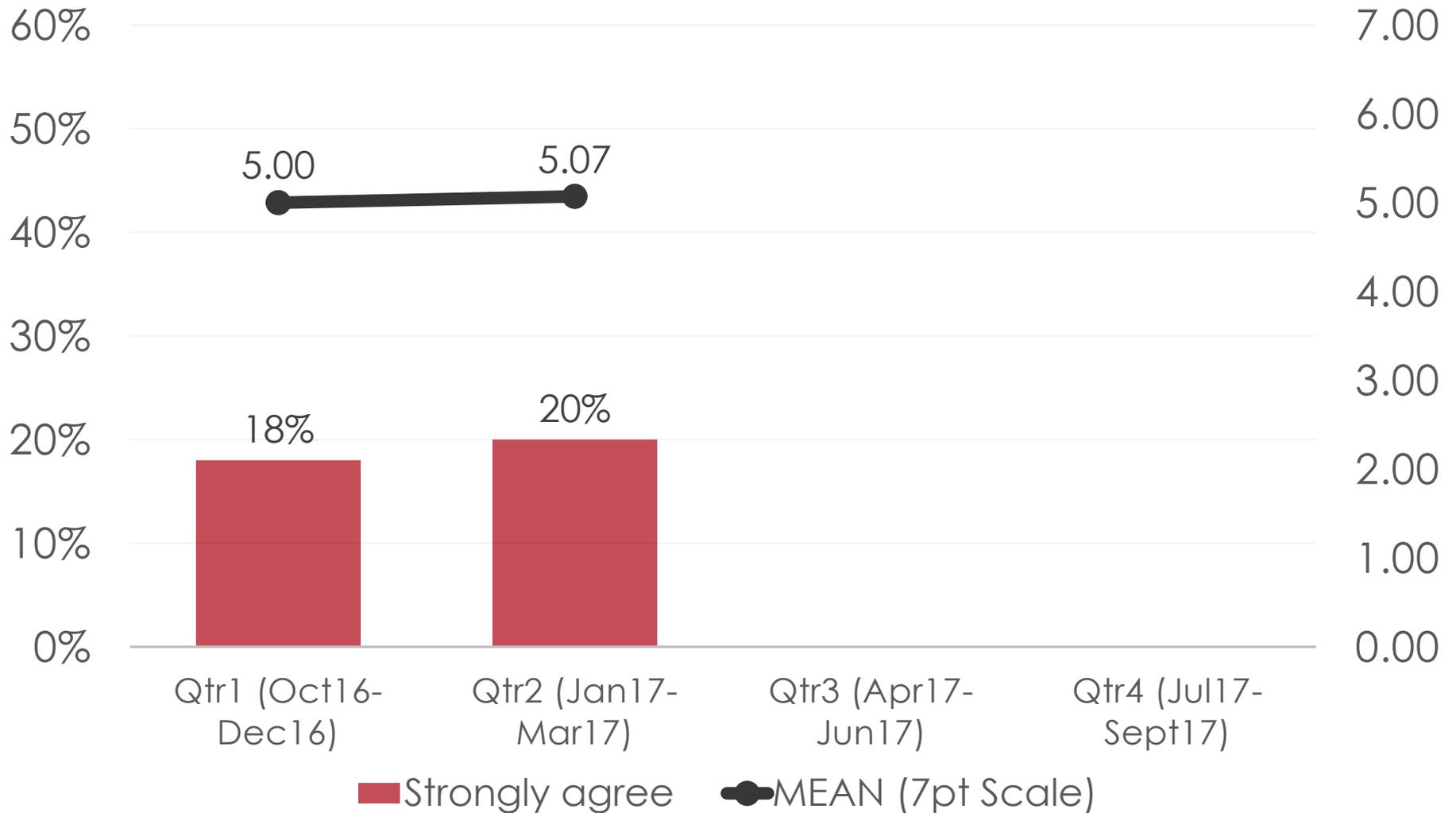
Tour drivers were professional



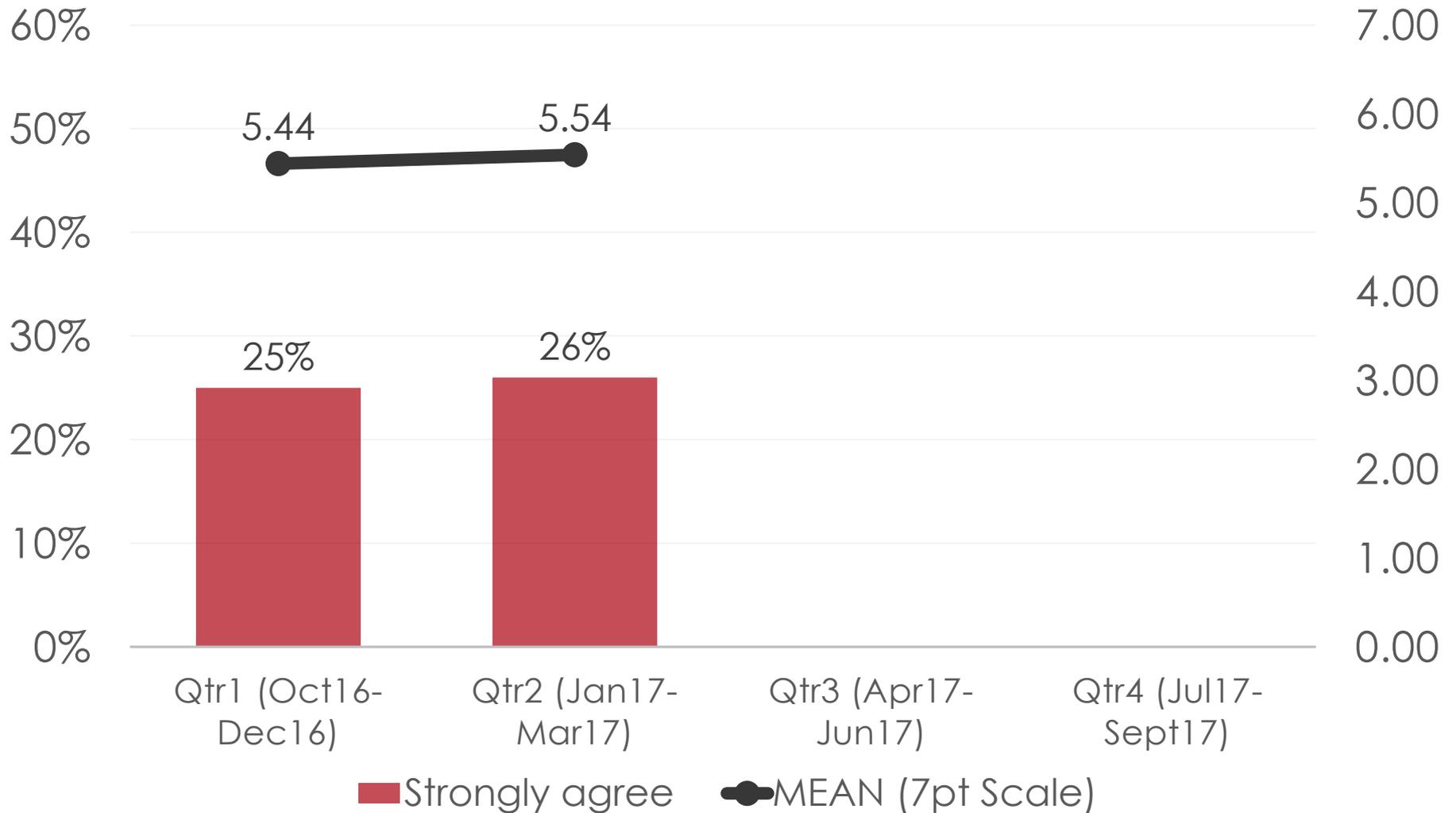
Taxi drivers were professional



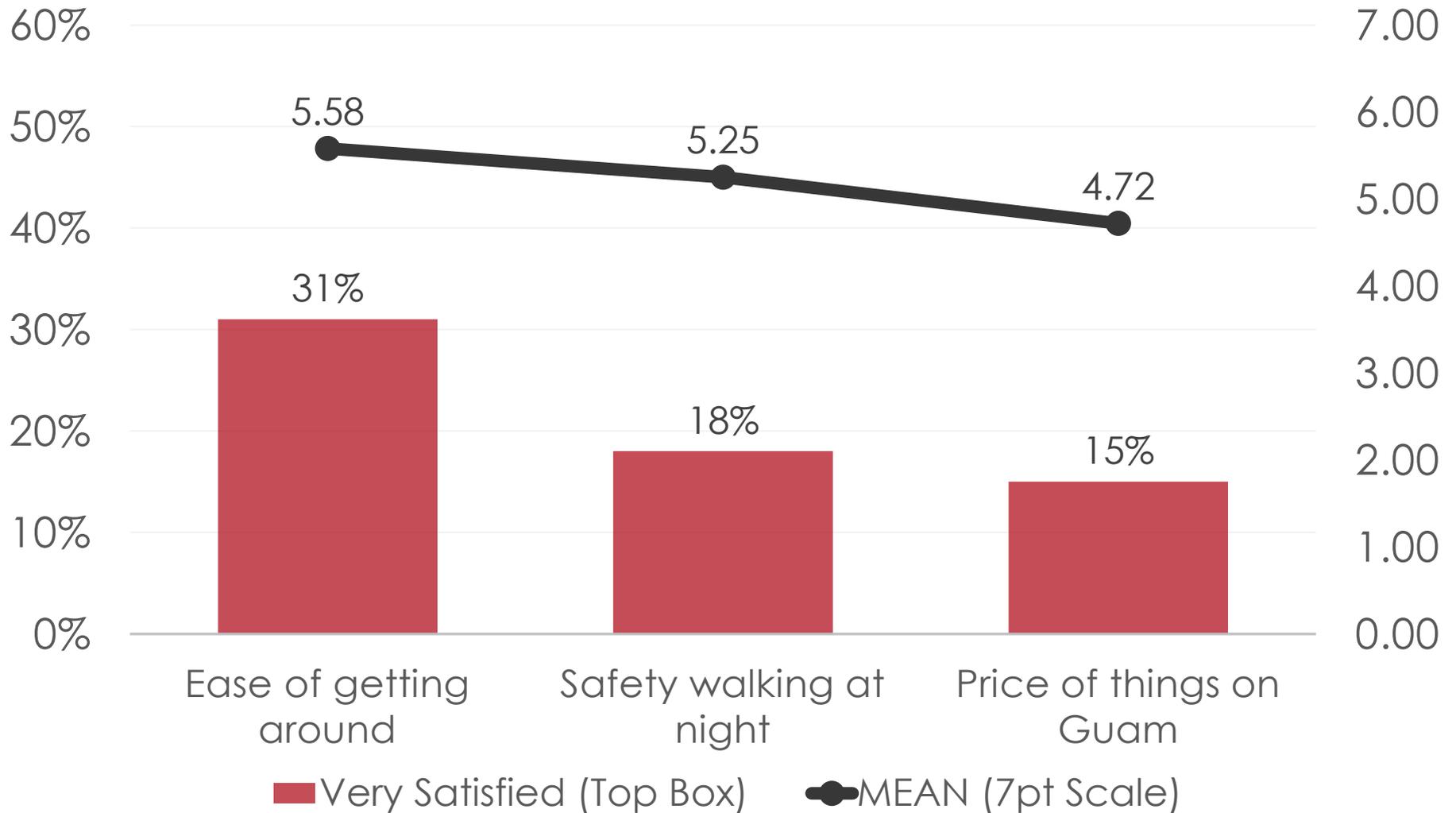
Taxis were clean



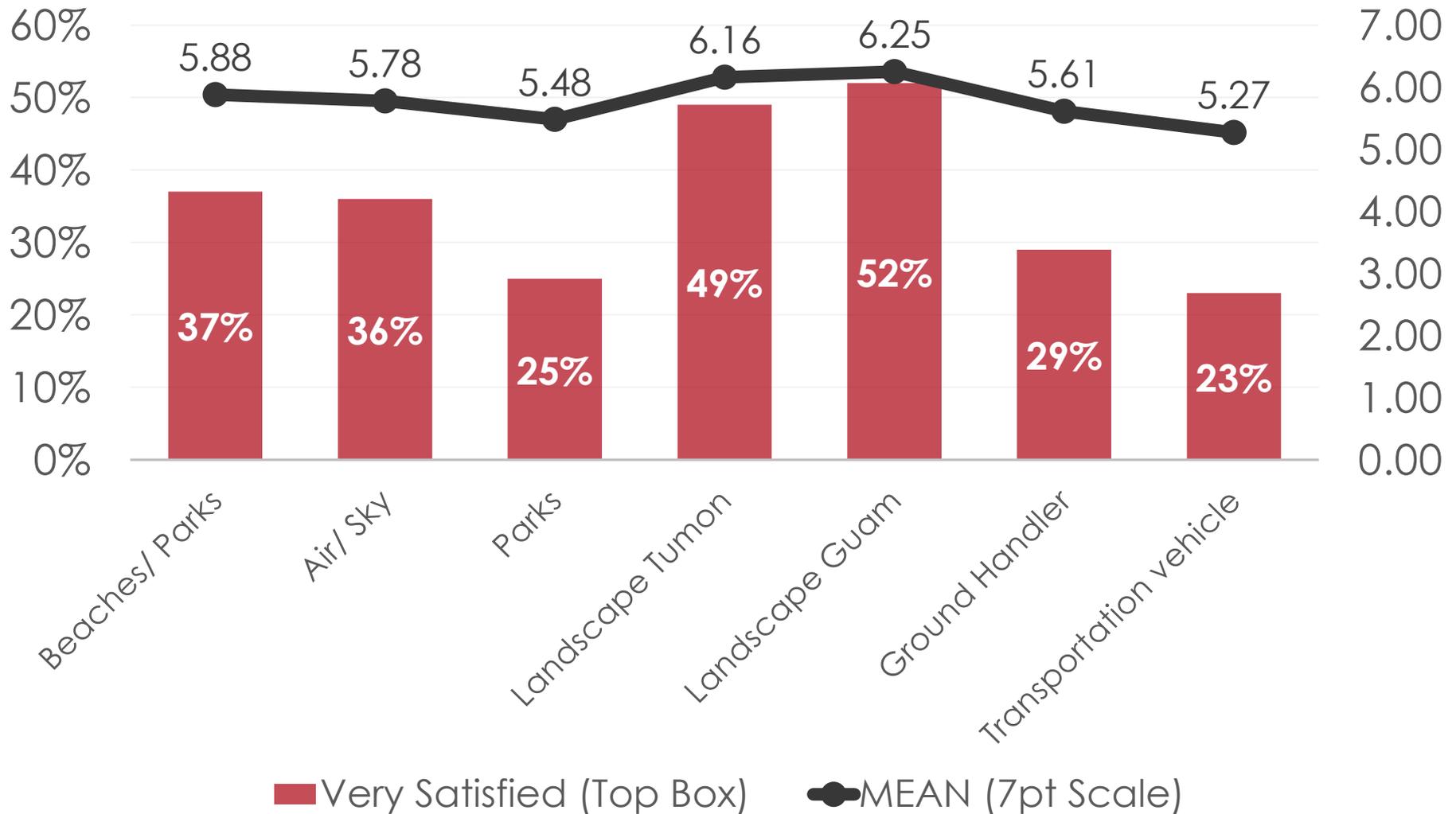
Guam airport was clean



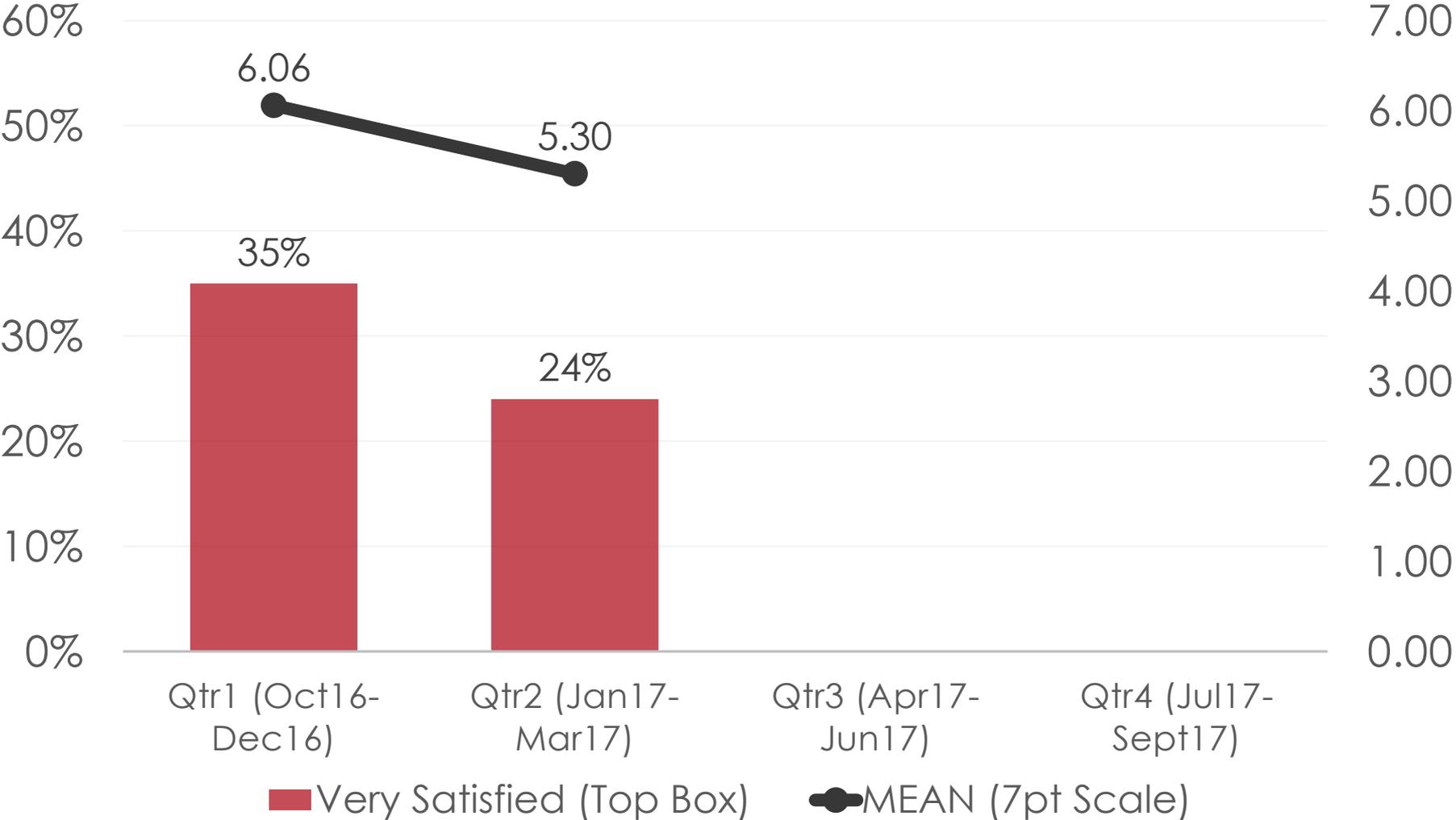
GENERAL SATISFACTION



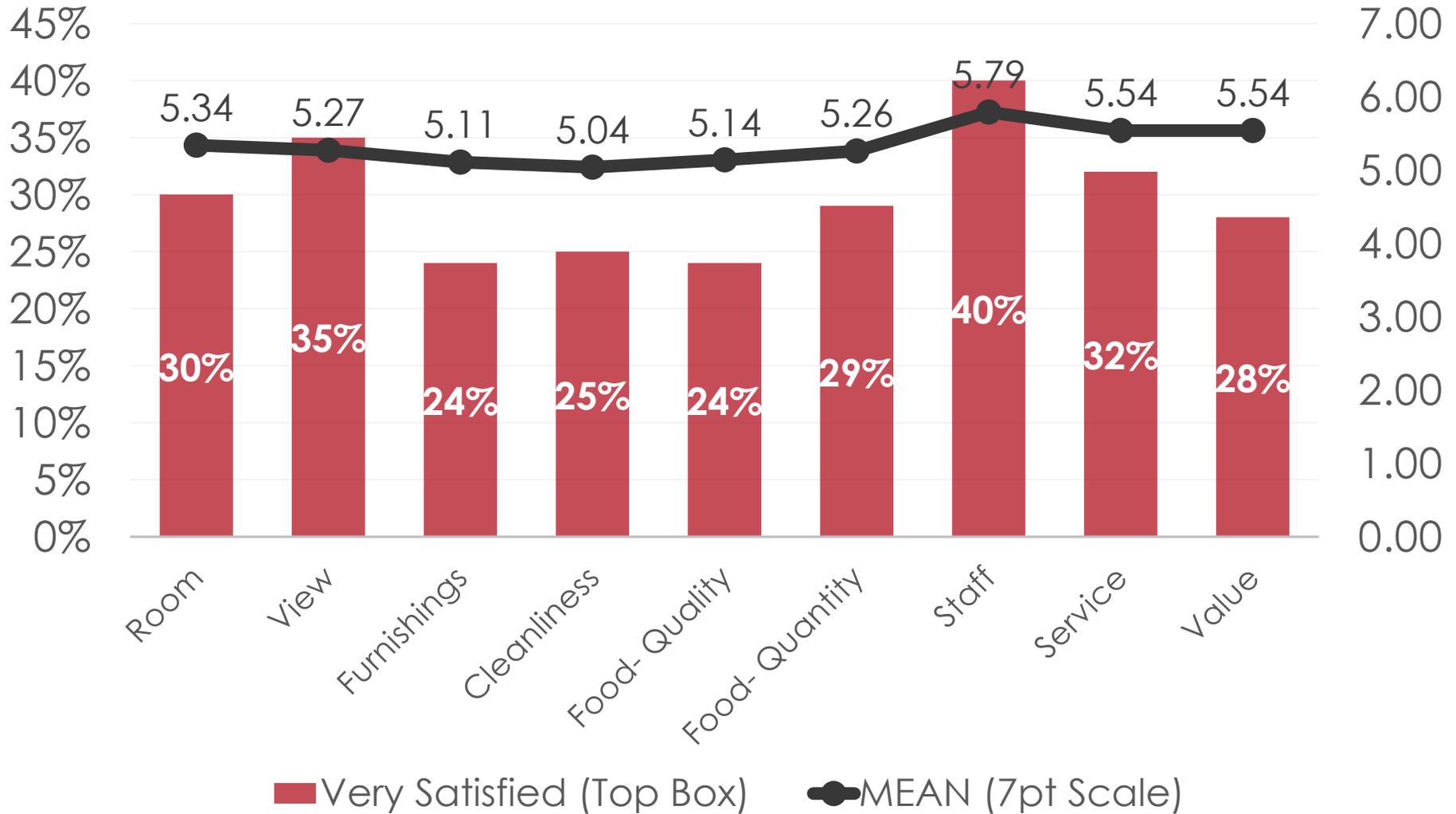
GENERAL SATISFACTION – Quality/ Cleanliness



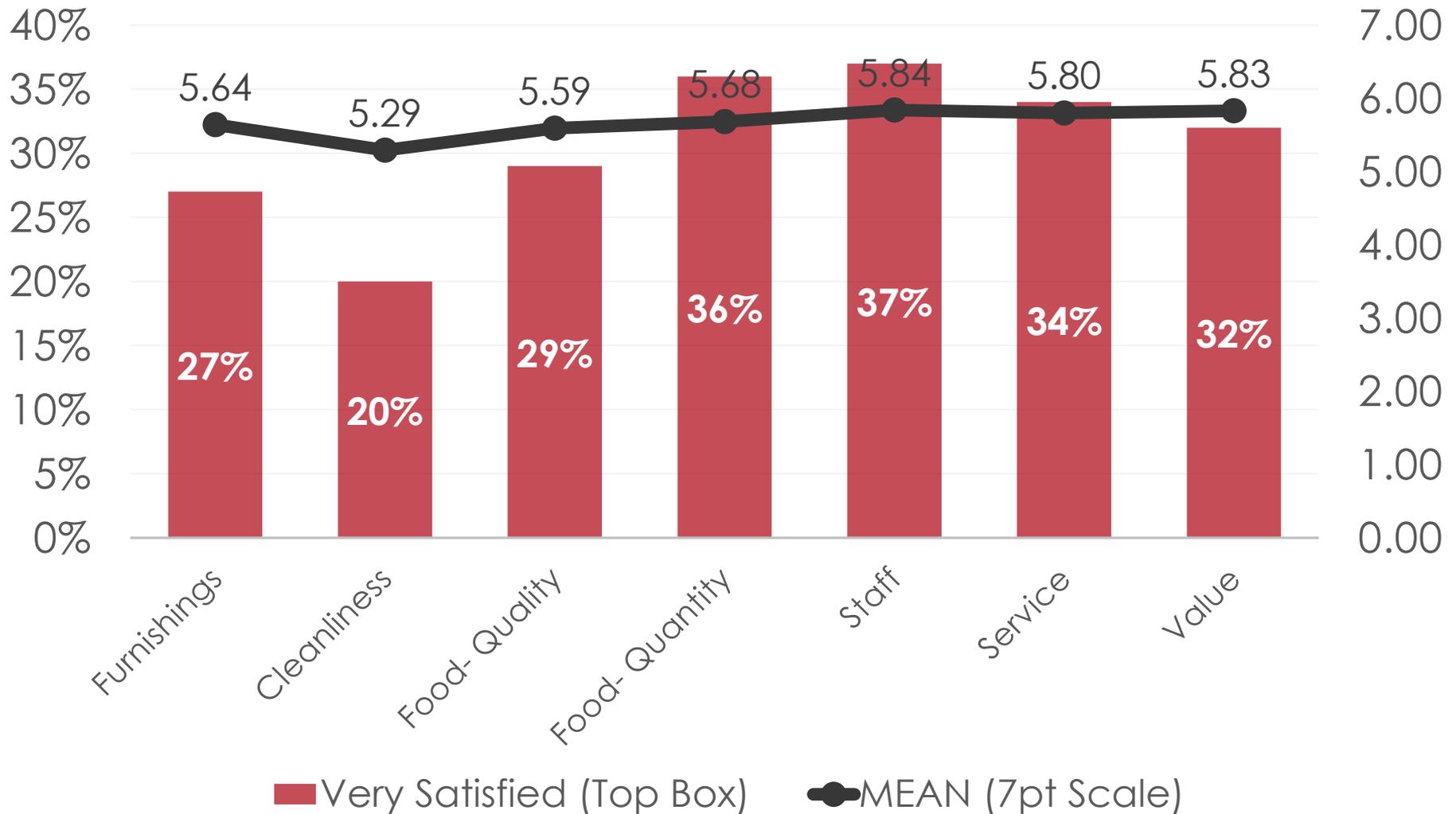
ACCOMMODATIONS – OVERALL SATISFACTION



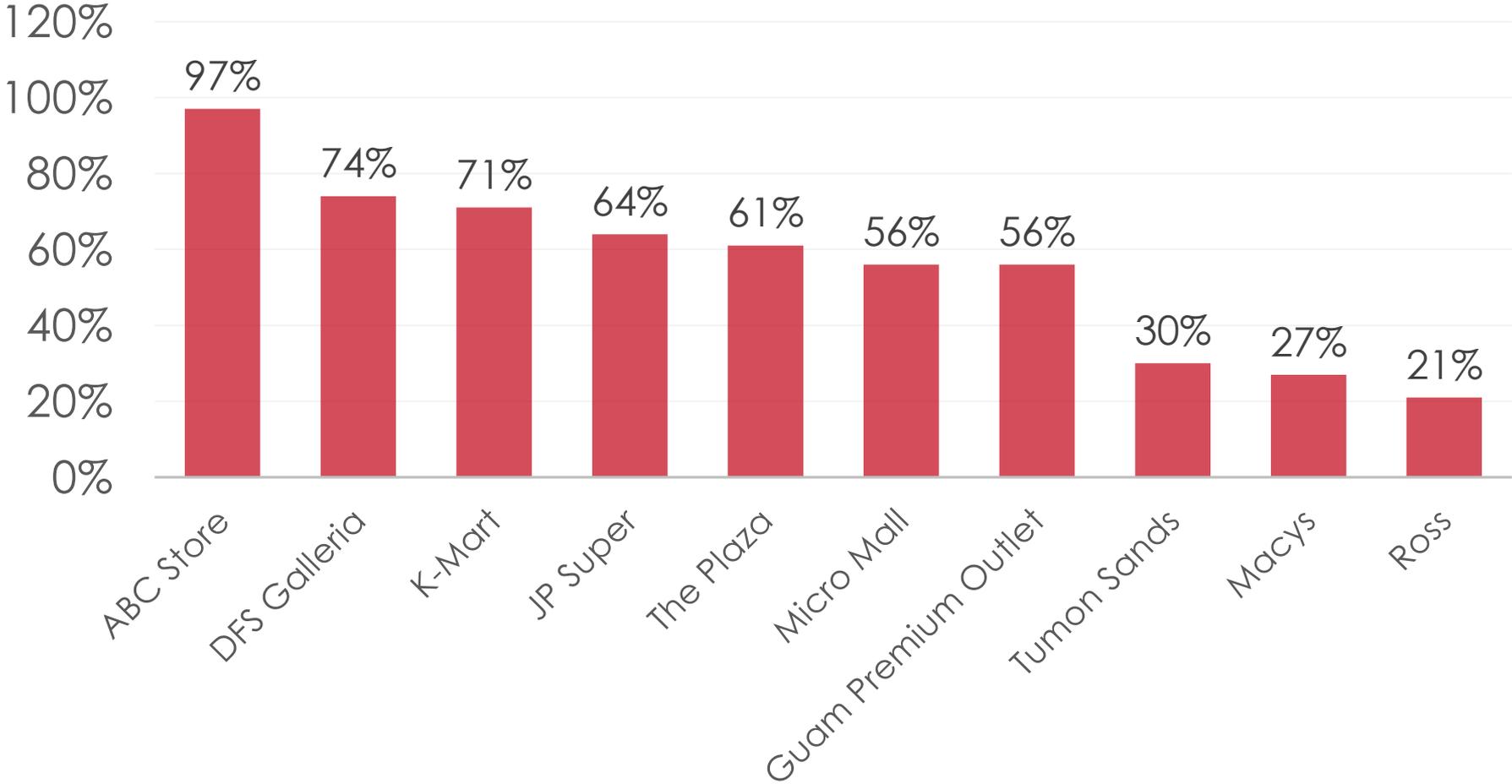
ACCOMMODATIONS – Satisfaction by Category



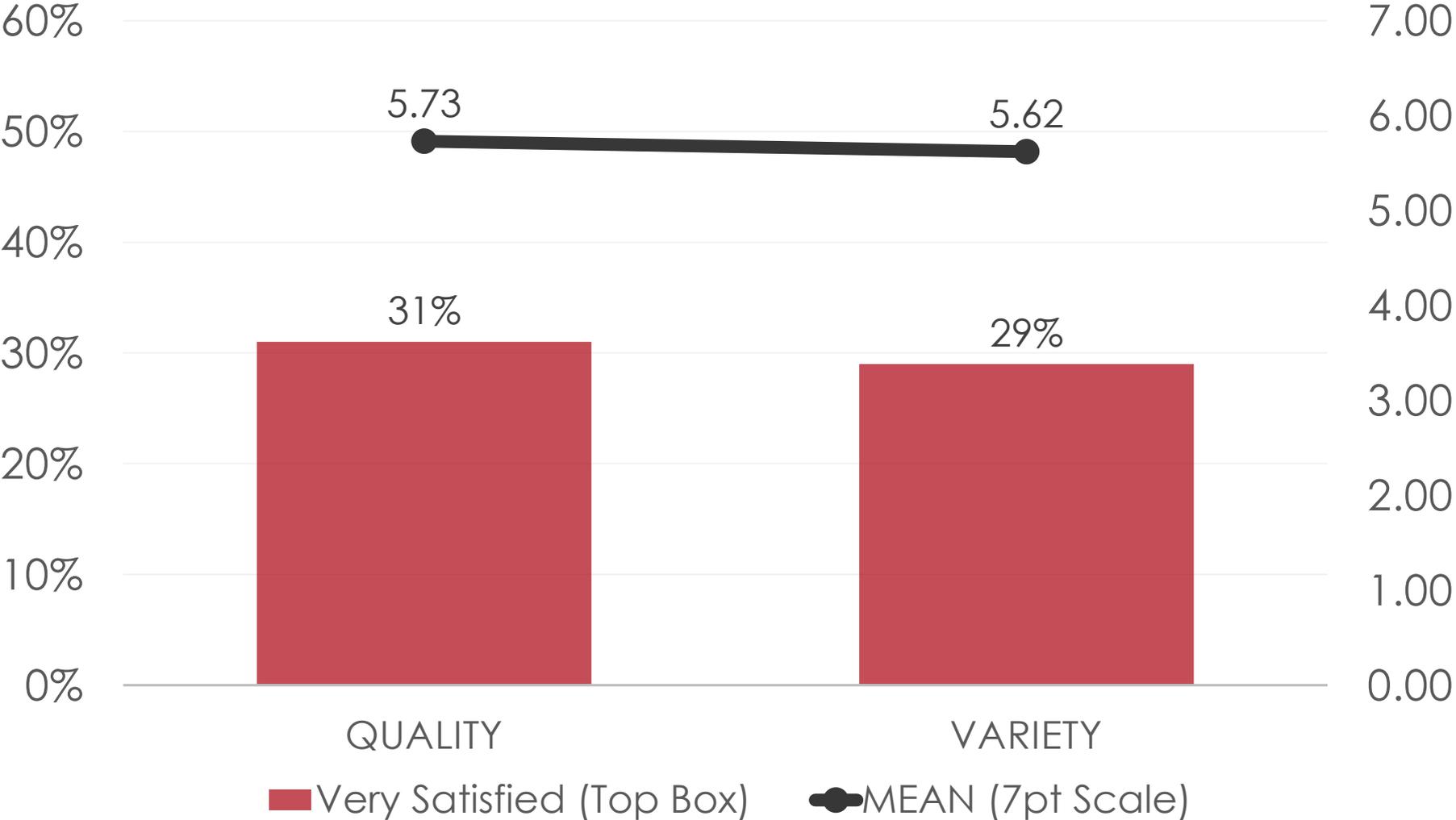
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



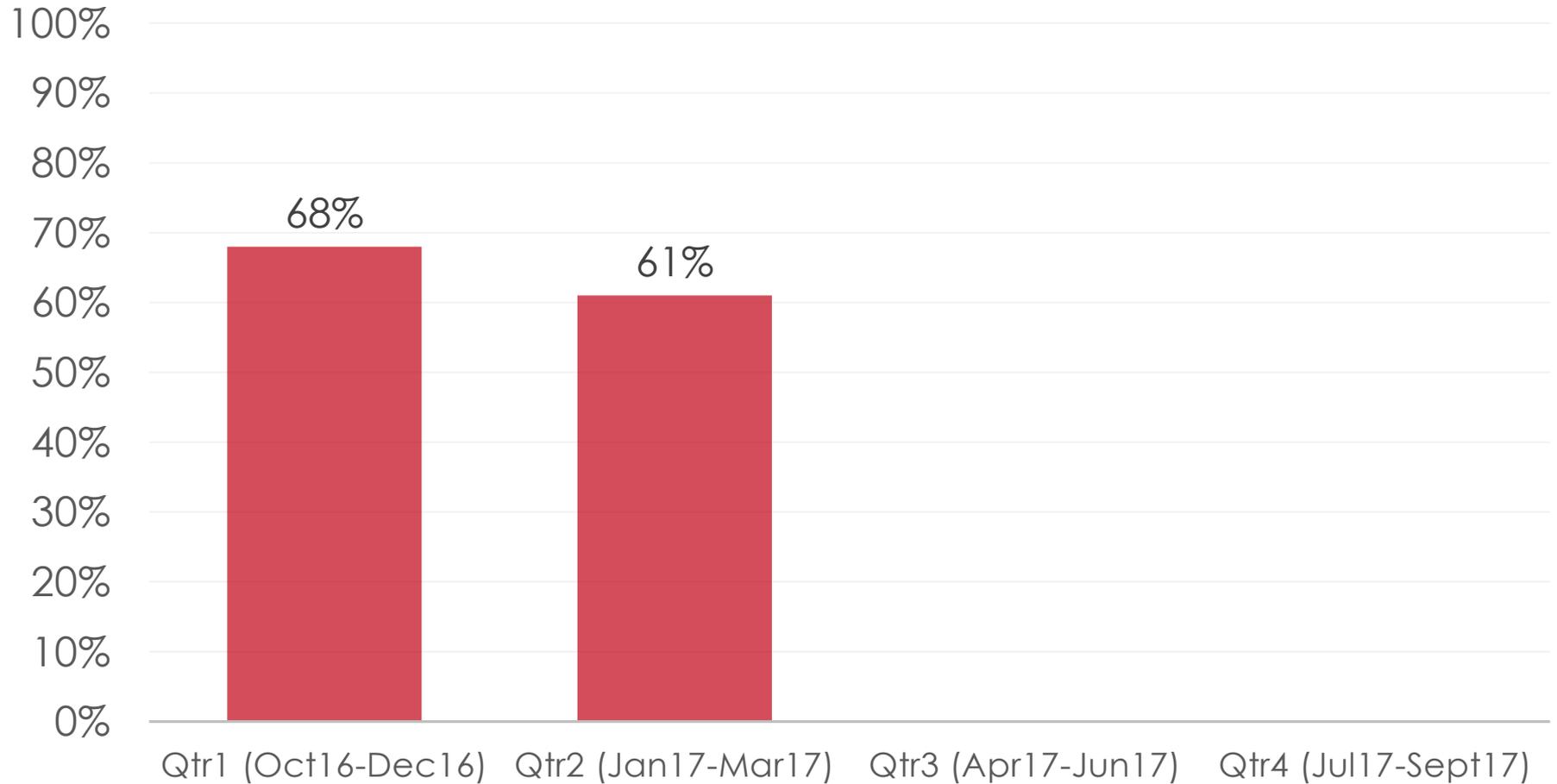
Shopping Malls/ Stores (Top Responses)



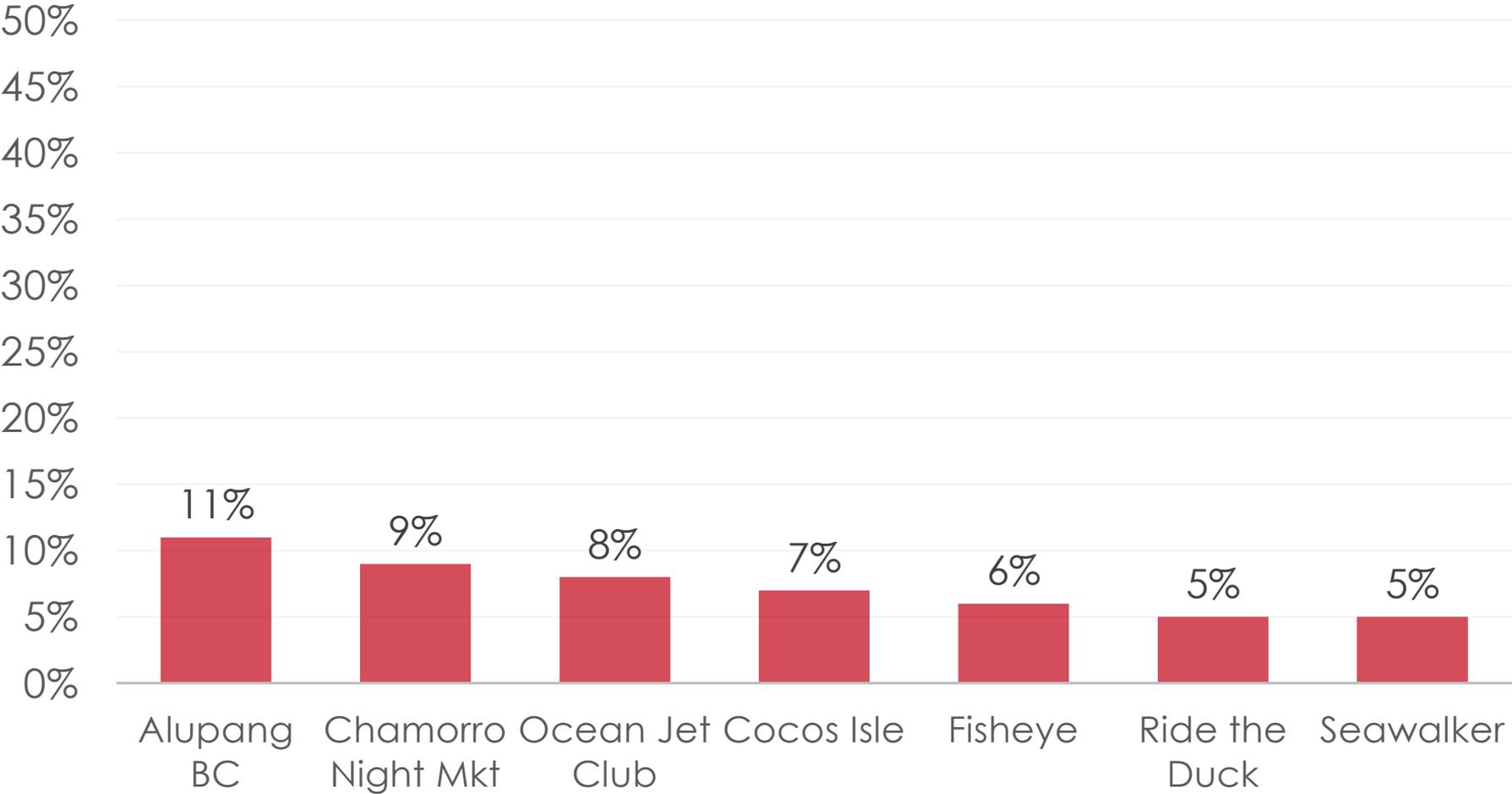
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

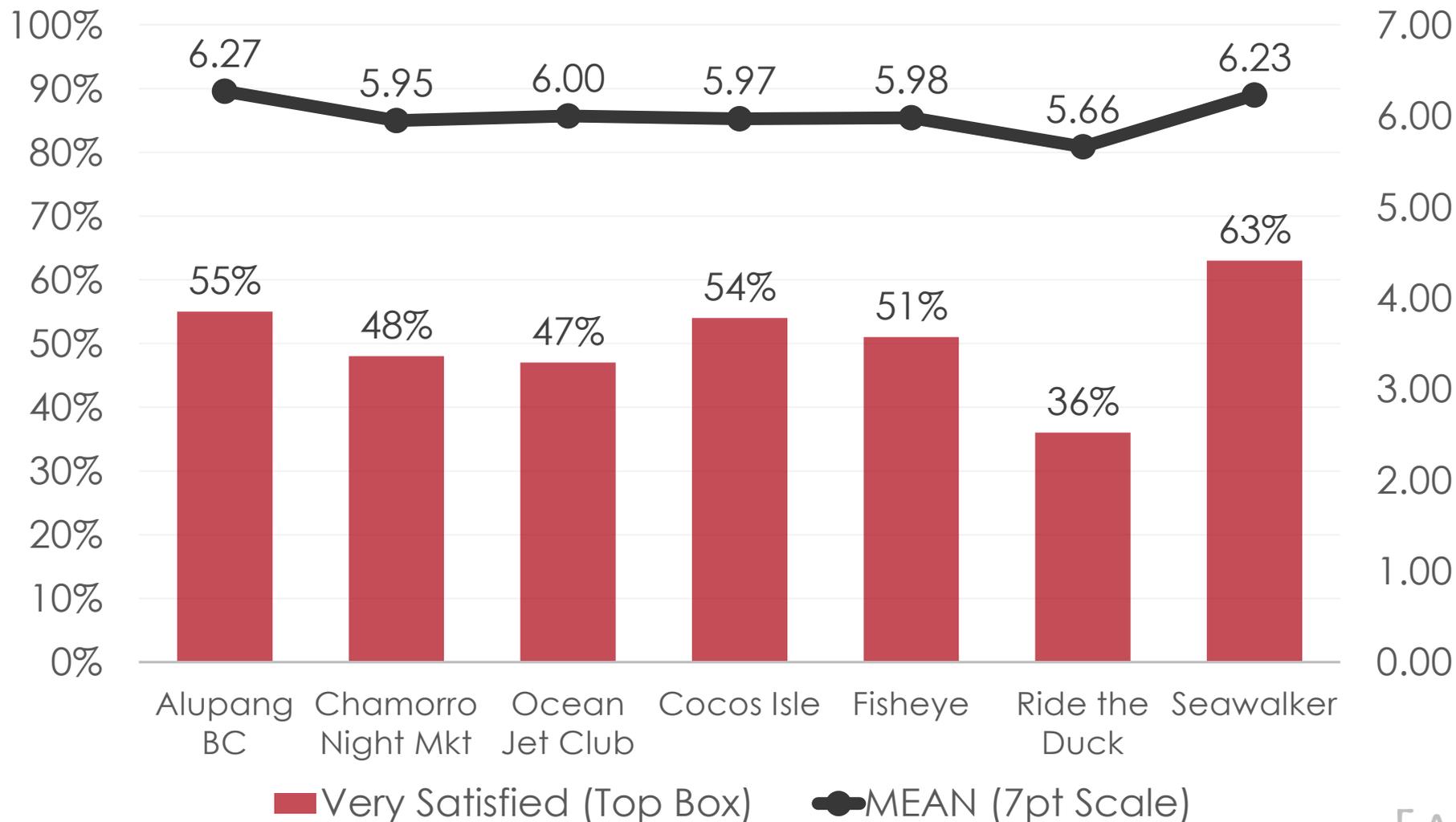


Optional Tour Participation (Top Responses)

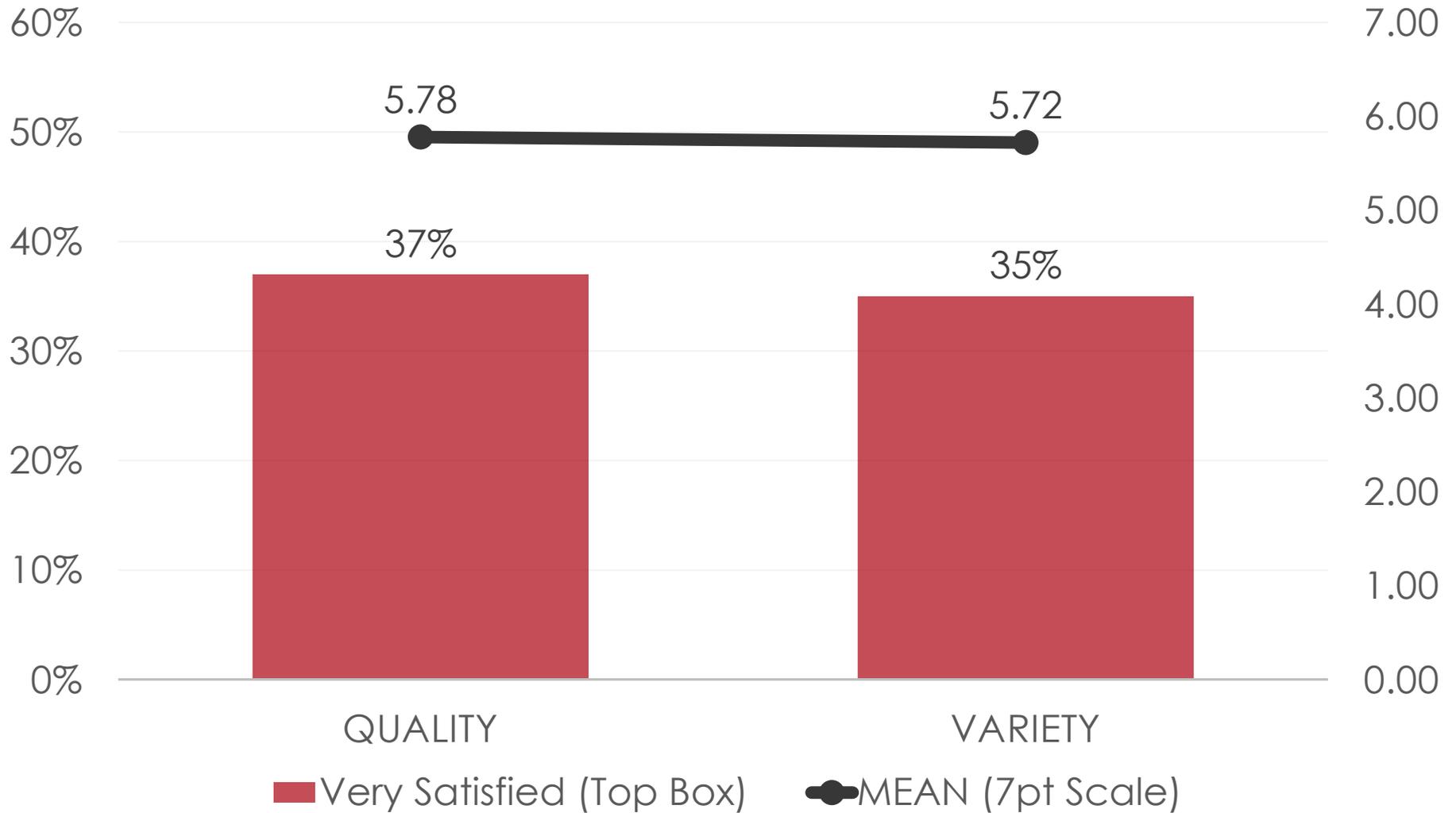


Optional Tour Satisfaction

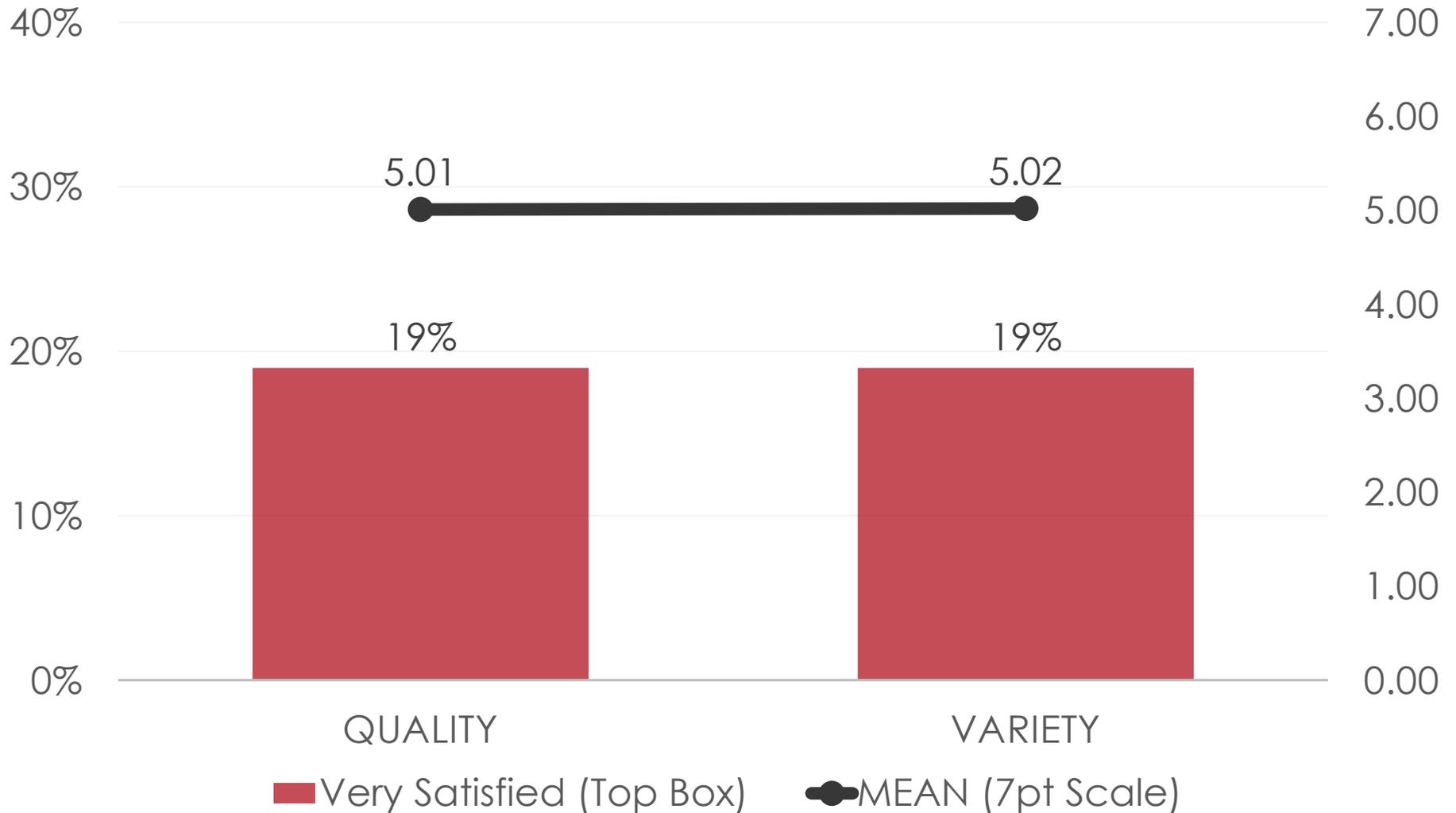
Top Responses only - Participation (5%+)



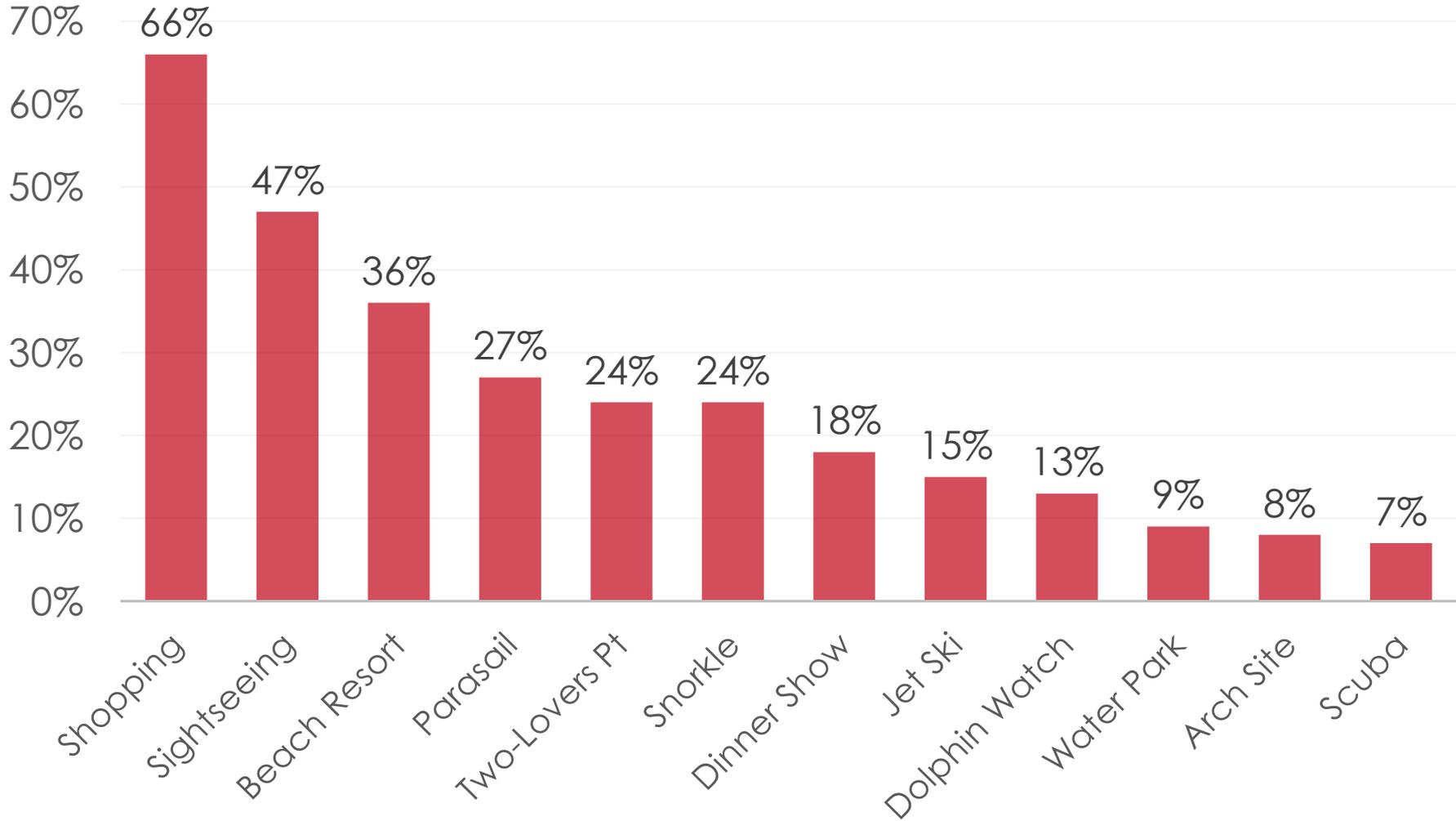
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

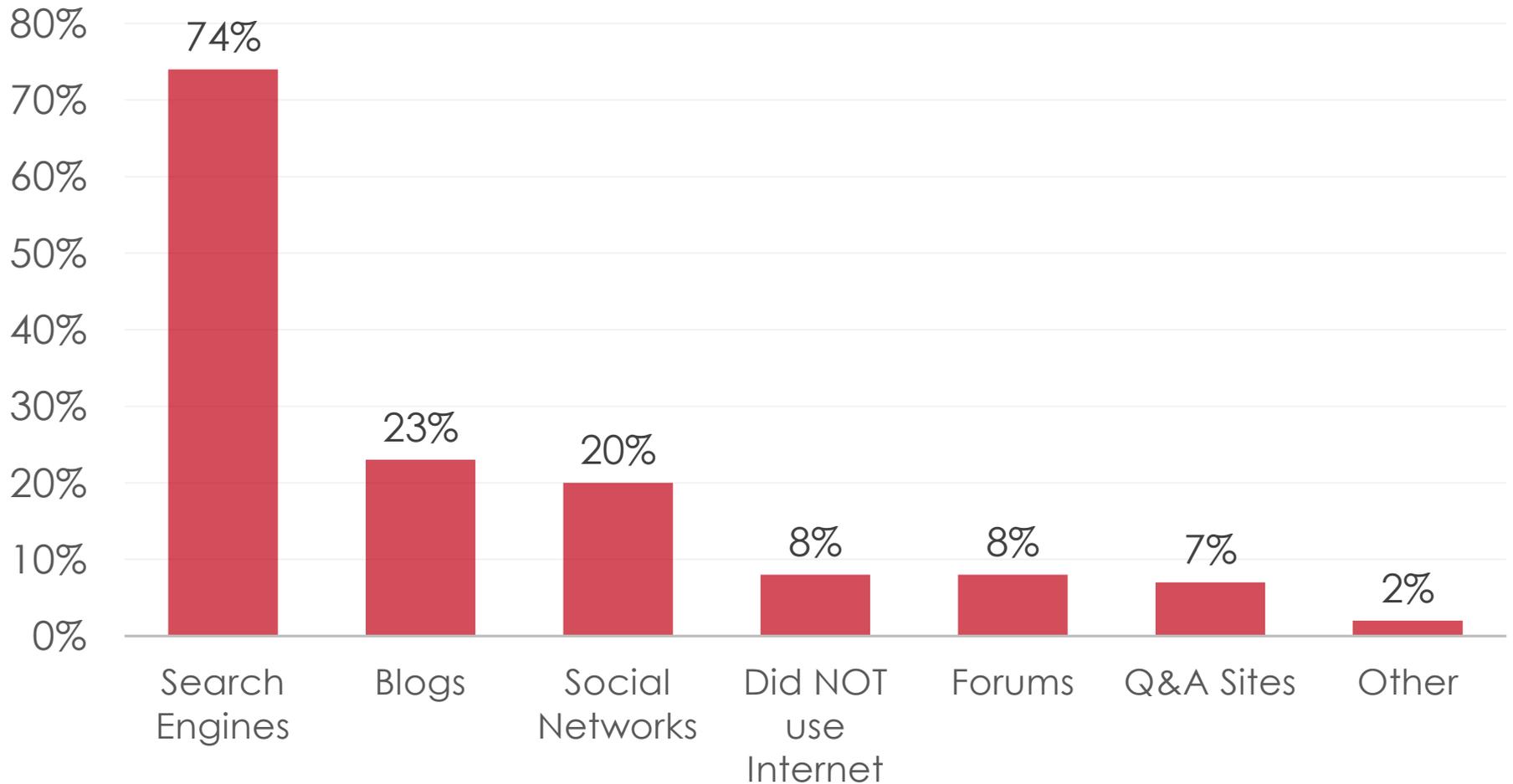


Activities Participation (Top Responses)



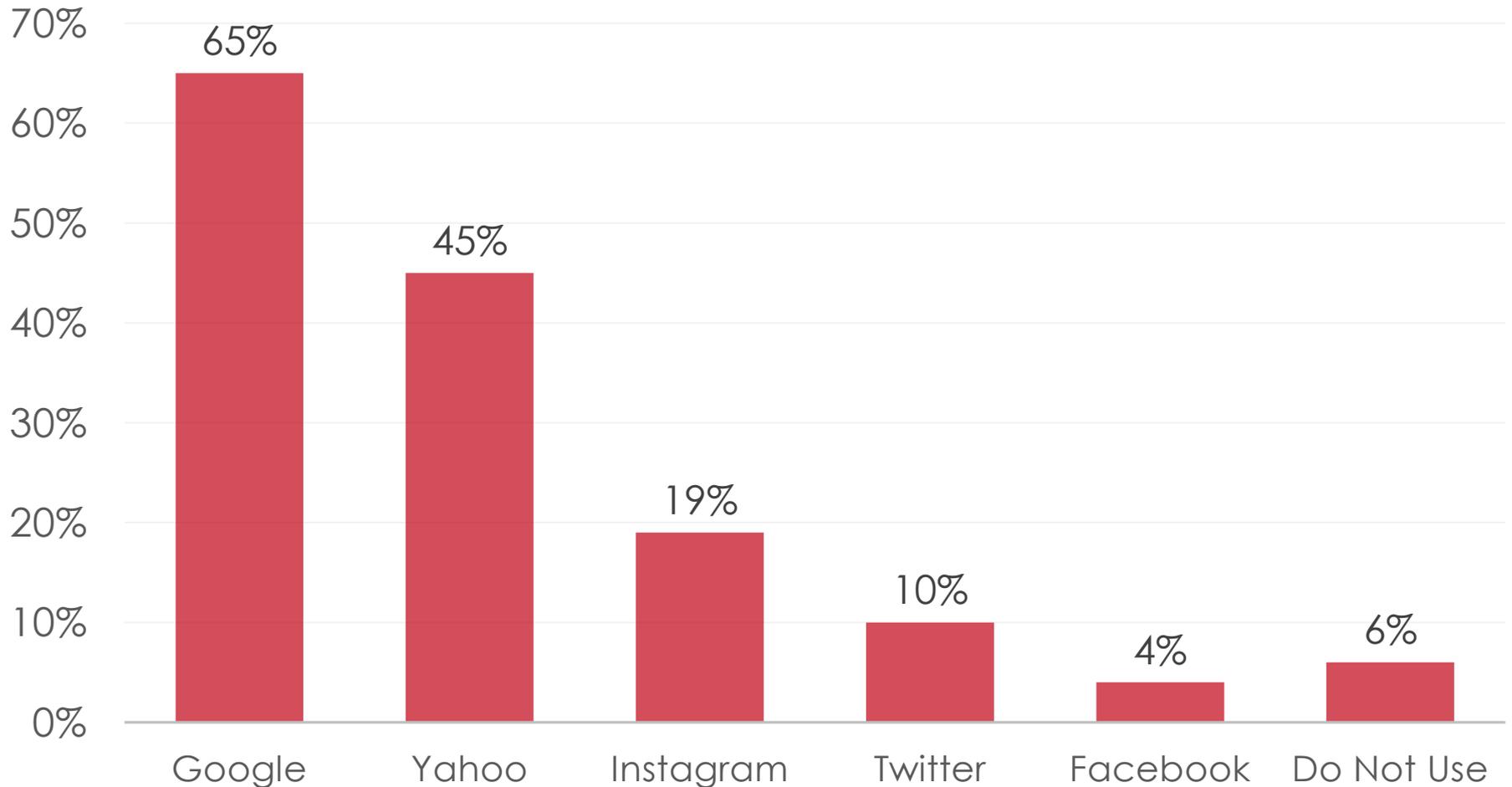
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



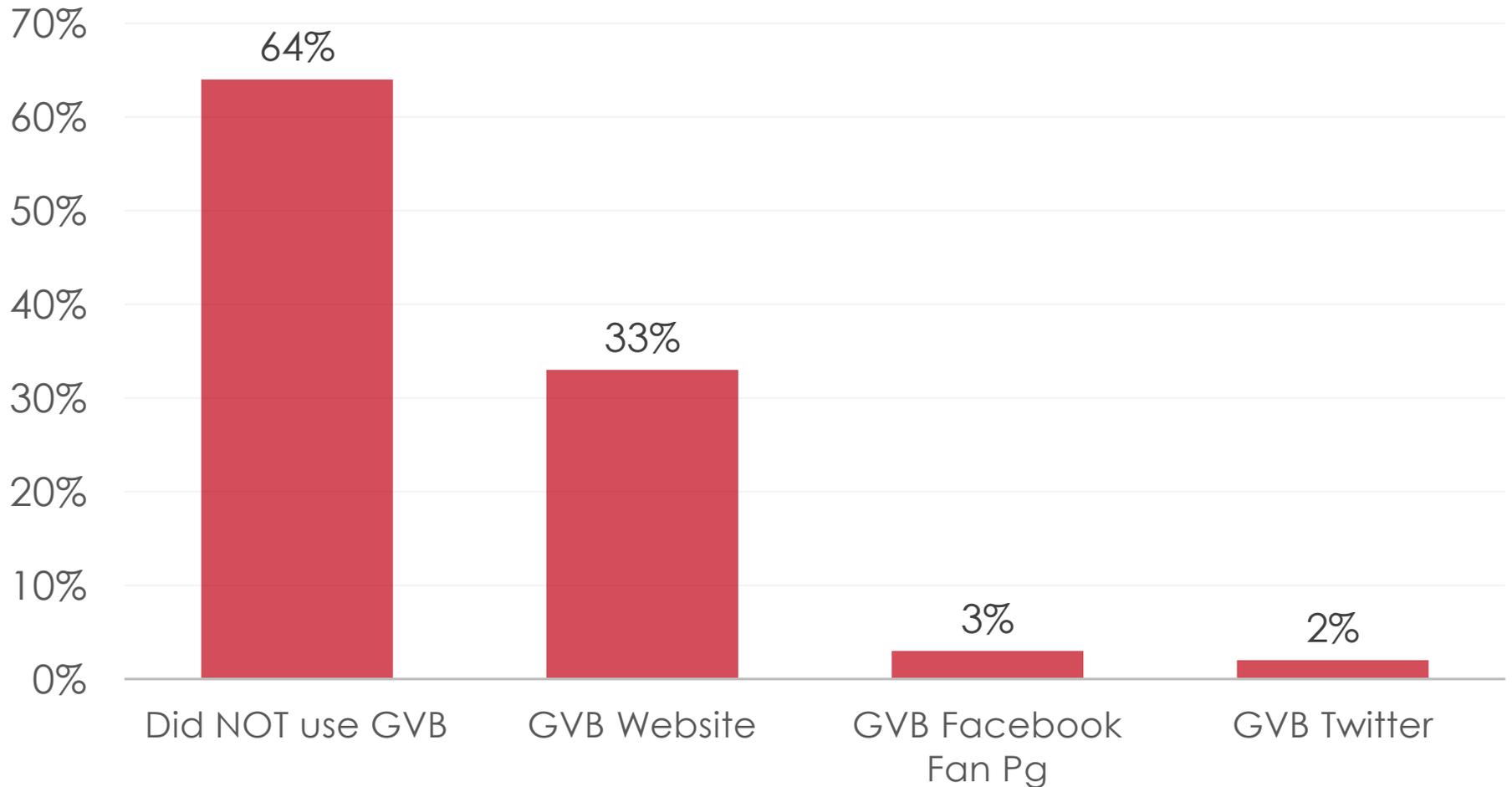
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

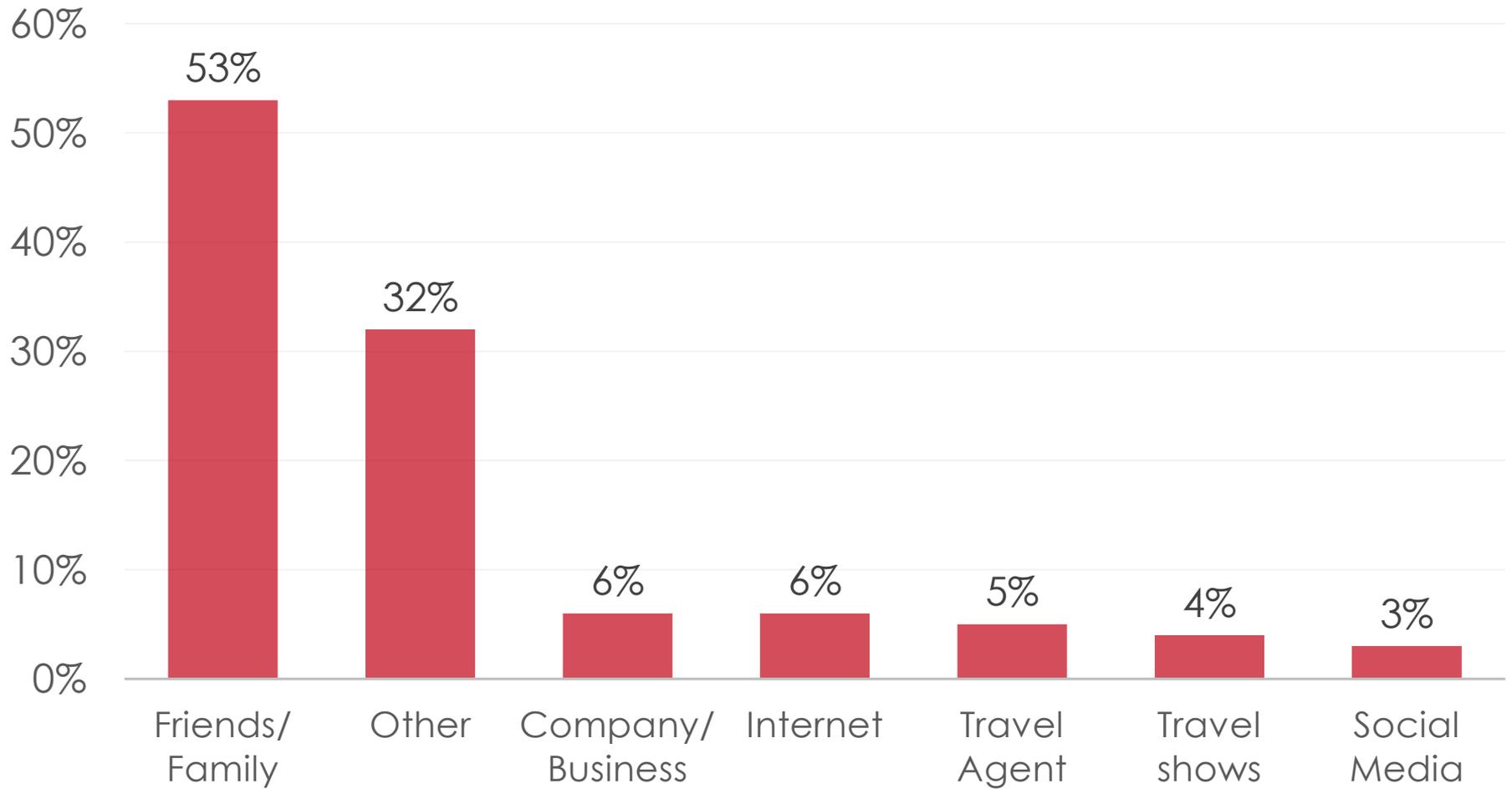


INTERNET- SOURCES OF INFORMATION

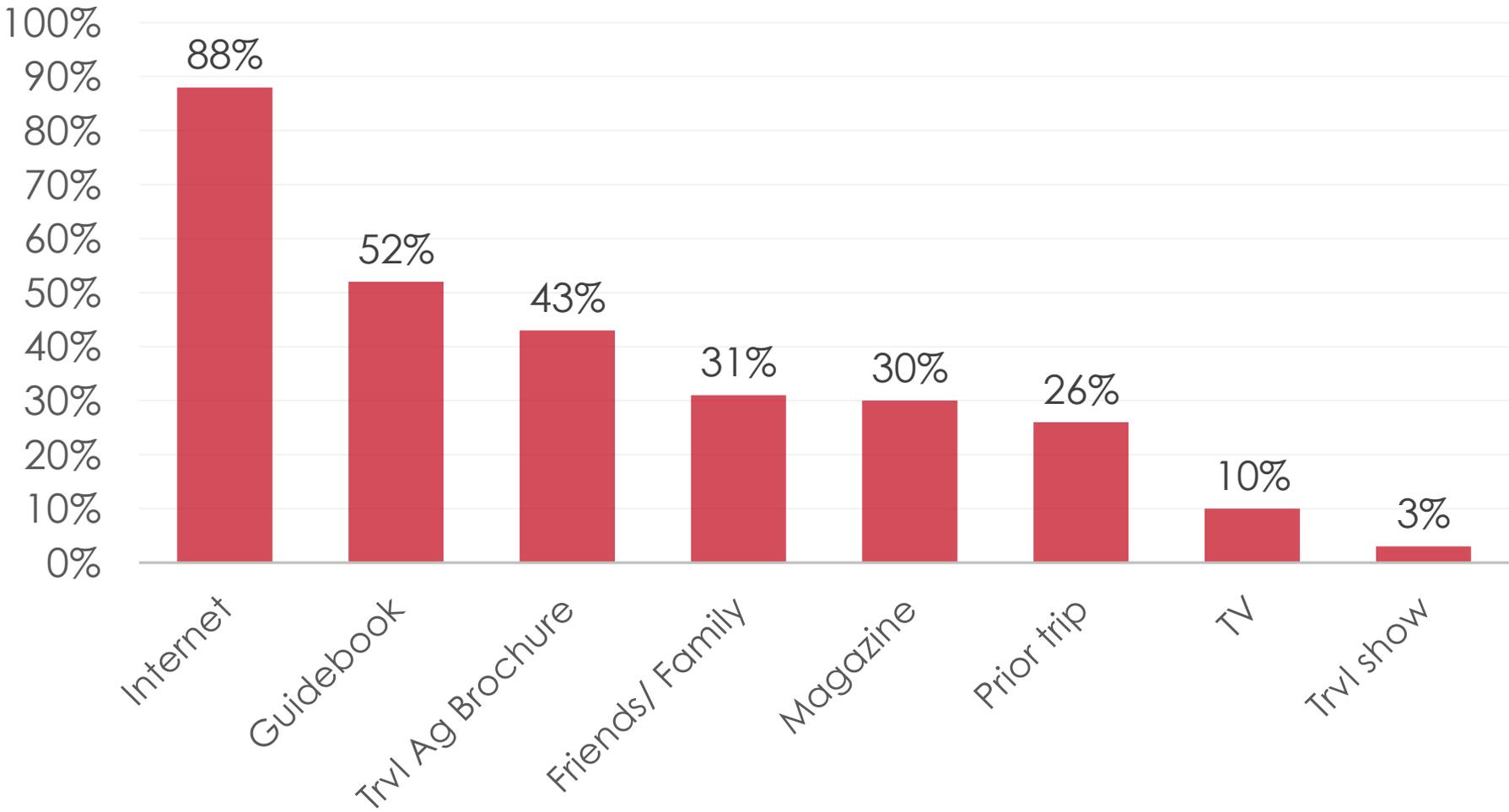
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

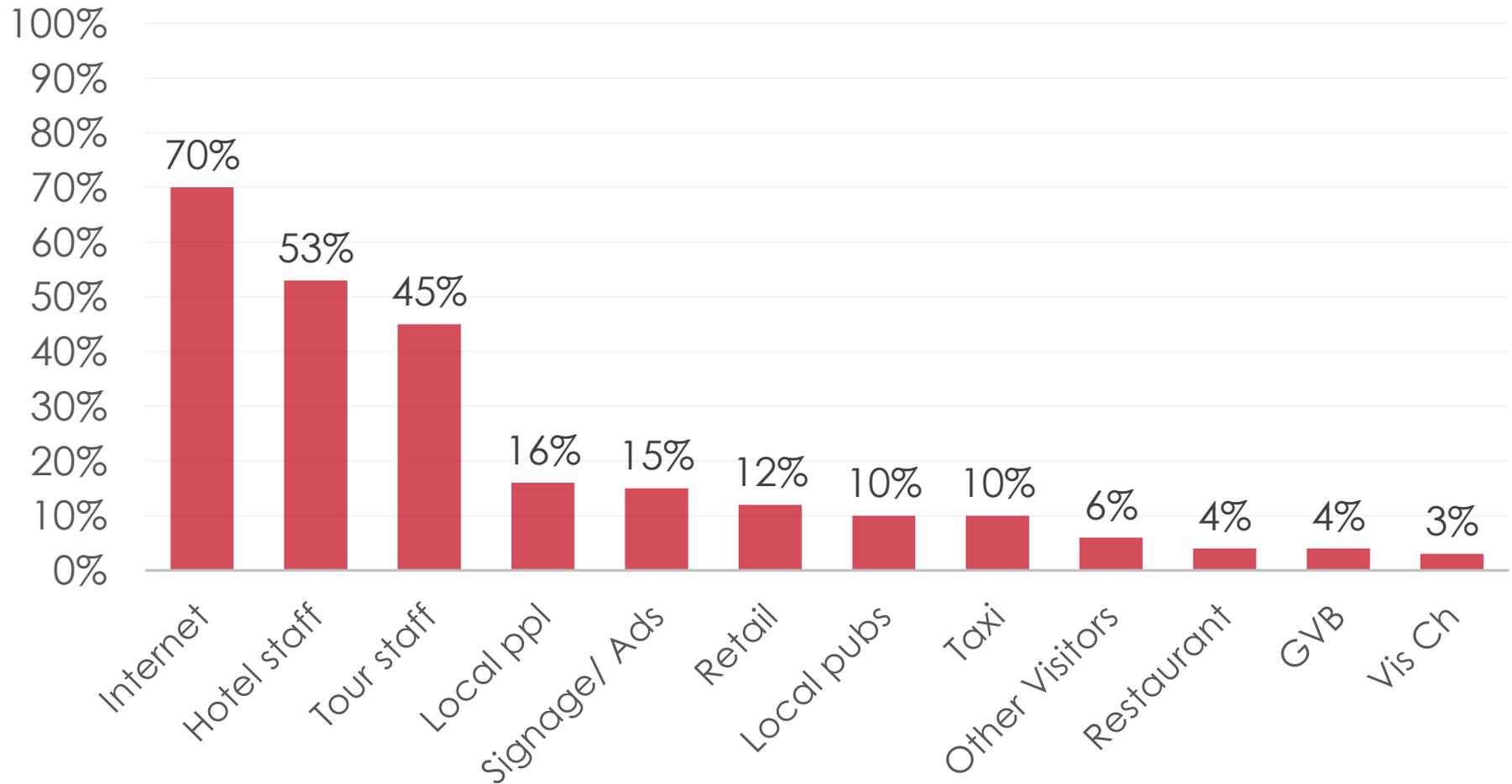
GUAM VISITORS BUREAU - EXIT SURVEY

Q1 Please select the top 3 sources of information you used to find out about Guam before you trip.

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|---------------------------------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| Q1 | Internet | 88% | 87% | 94% | 83% | 64% | 83% | 86% | 82% |
| | Travel Guidebook- Bookstore | 52% | 52% | 58% | 55% | 36% | 49% | 45% | 57% |
| | Travel Agent Brochure | 43% | 43% | 41% | 45% | 53% | 63% | 31% | 25% |
| | Friend/ Relative | 31% | 23% | 33% | 28% | 27% | 26% | 24% | 11% |
| | Magazine (Consumer) | 30% | 31% | 20% | 33% | 33% | 26% | 26% | 32% |
| | Prior Trip | 26% | 37% | 30% | 20% | 44% | 23% | 61% | 39% |
| | TV | 10% | 8% | 6% | 15% | 9% | 6% | 9% | 14% |
| | Consumer Trvl Show | 3% | 3% | | 10% | | 3% | 3% | |
| | Co-Worker/ Company Trvl Dept | 2% | 2% | 5% | 5% | 2% | | 3% | 11% |
| | Other | 2% | 1% | | | 4% | 3% | 2% | |
| | GVB Promo | 1% | 1% | 1% | | 2% | | 1% | |
| | Newspaper | 1% | 0% | | 3% | | | 1% | |
| | Travel Trade Show | 1% | 1% | | | | 3% | 1% | 4% |
| | GVB Office | 1% | 1% | 1% | 3% | | | 1% | 4% |
| | Radio | 0% | 0% | | | | | 0% | |
| | Theater Ad | 0% | | | 3% | | | 0% | |
| | Total | 1054 | 419 | 79 | 40 | 45 | 35 | 459 | 28 |

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

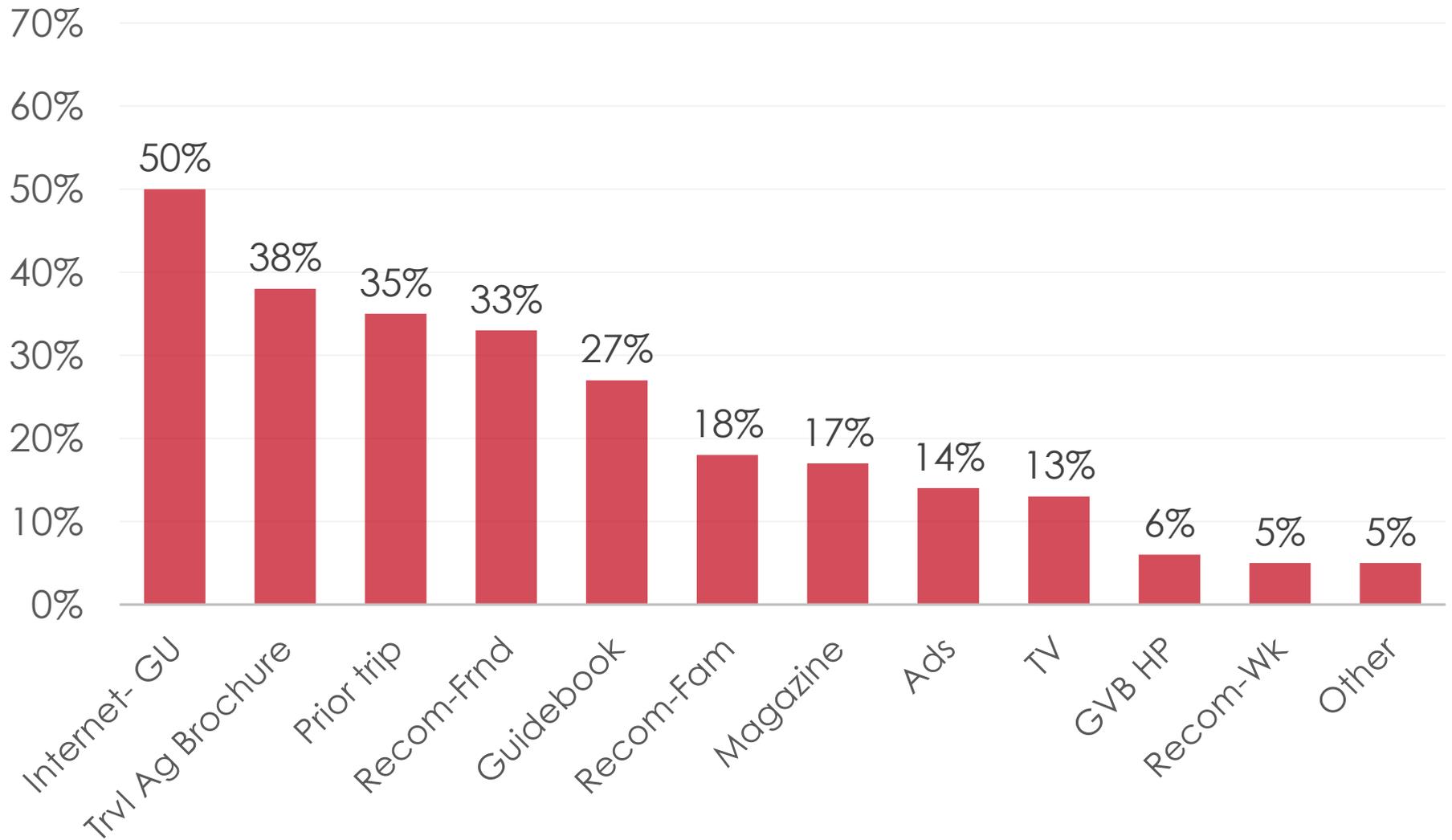
GUAM VISITORS BUREAU - EXIT SURVEY

Q2 Please select the top 3 sources of information you used to find out about Guam while you were here.

| | | TOTAL | FAMILY | OFFICE LADY/ SALARY | GROUP TRVL | SILVERS | WEDDING | REPEAT | MICE |
|----|----------------------|-------|--------|---------------------------|------------|---------|---------|--------|------|
| | | - | - | - | - | - | - | - | - |
| Q2 | Internet | 70% | 70% | 75% | 59% | 45% | 49% | 65% | 56% |
| | Hotel Staff | 53% | 56% | 49% | 62% | 64% | 57% | 54% | 74% |
| | Tour Staff | 45% | 47% | 44% | 54% | 48% | 51% | 43% | 52% |
| | Local Ppl | 16% | 10% | 5% | 26% | 7% | 11% | 14% | 19% |
| | Signs/ Advertisement | 15% | 14% | 13% | 18% | 14% | 14% | 15% | 19% |
| | Retail Staff | 12% | 13% | 13% | 10% | 16% | 17% | 10% | 11% |
| | Other | 10% | 8% | 15% | | 11% | 9% | 9% | 7% |
| | Taxi Driver | 10% | 7% | 11% | 21% | 9% | 11% | 10% | 19% |
| | Local Publication | 10% | 12% | 10% | 15% | 11% | 11% | 11% | 11% |
| | Other Visitors | 6% | 7% | 5% | 8% | 9% | 6% | 9% | 11% |
| | Restaurant Staff | 4% | 4% | 4% | 5% | 7% | | 3% | |
| | GVB | 4% | 6% | 6% | 3% | 9% | 3% | 4% | |
| | Visitor Channel | 3% | 5% | 1% | 3% | 14% | 3% | 4% | 4% |
| | Total | 1041 | 415 | 79 | 39 | 44 | 35 | 454 | 27 |

Prepared by QMark Research

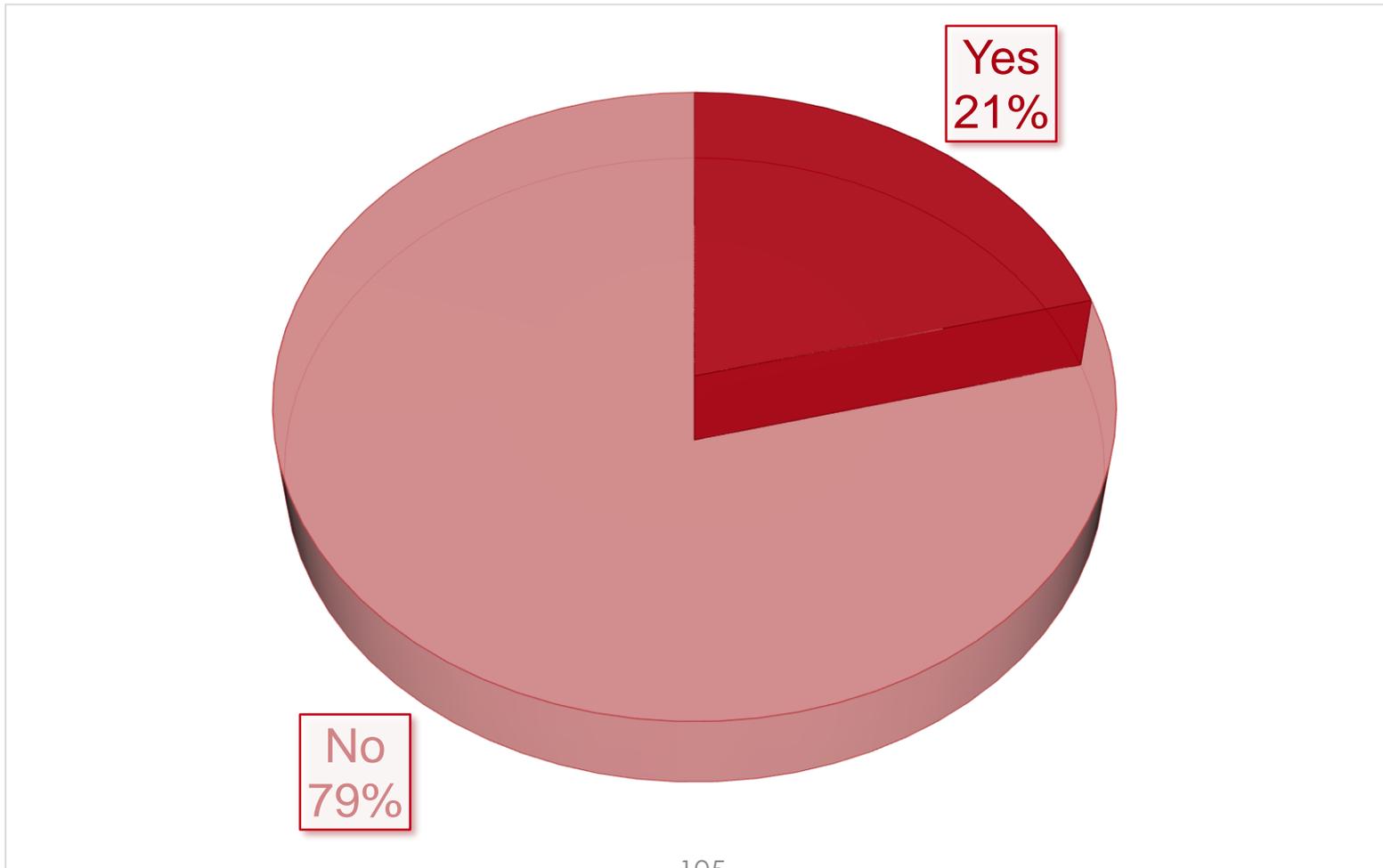
TRAVEL MOTIVATORS



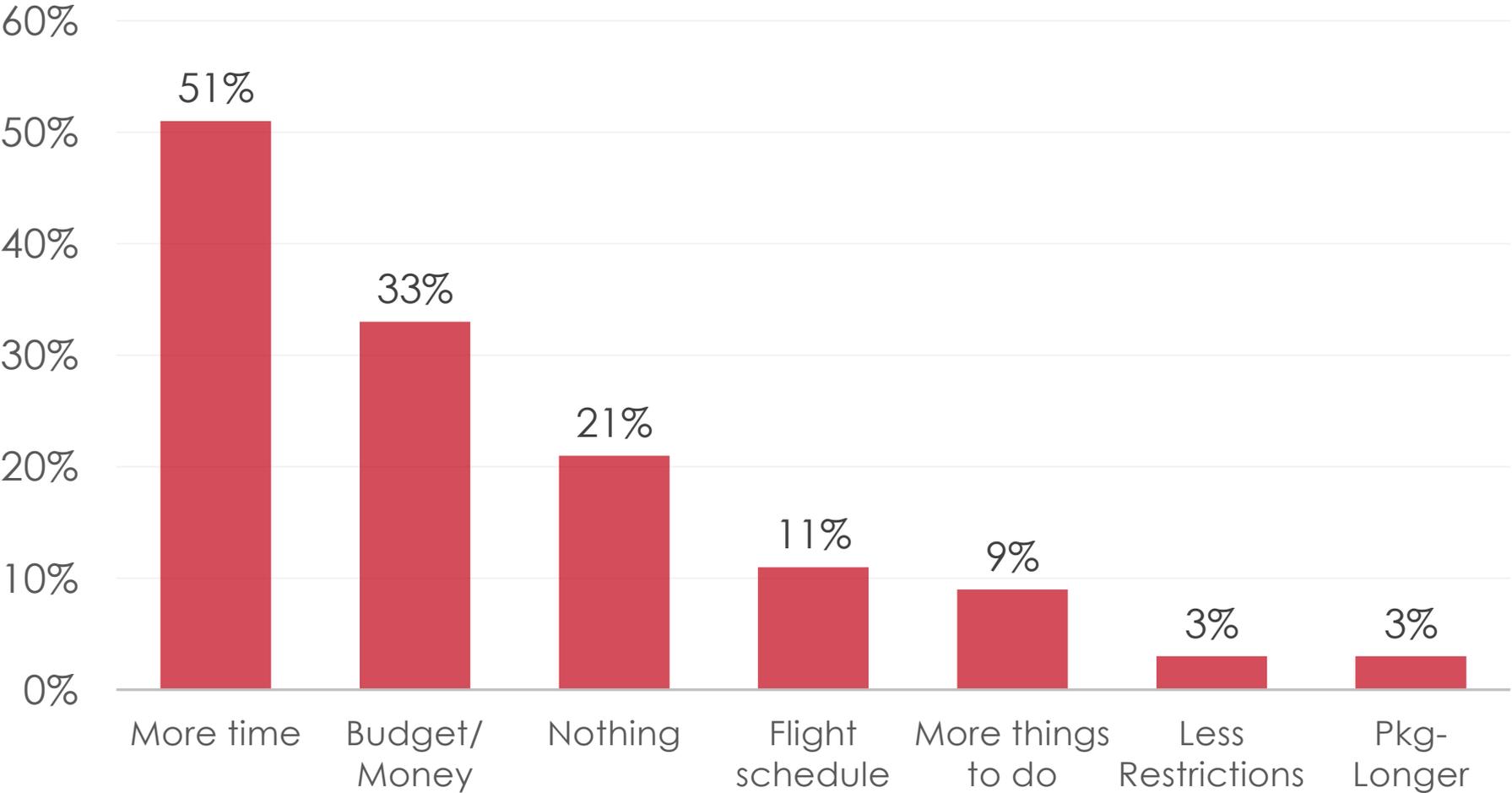
SECTION 6

FUTURE TRAVEL TO GUAM

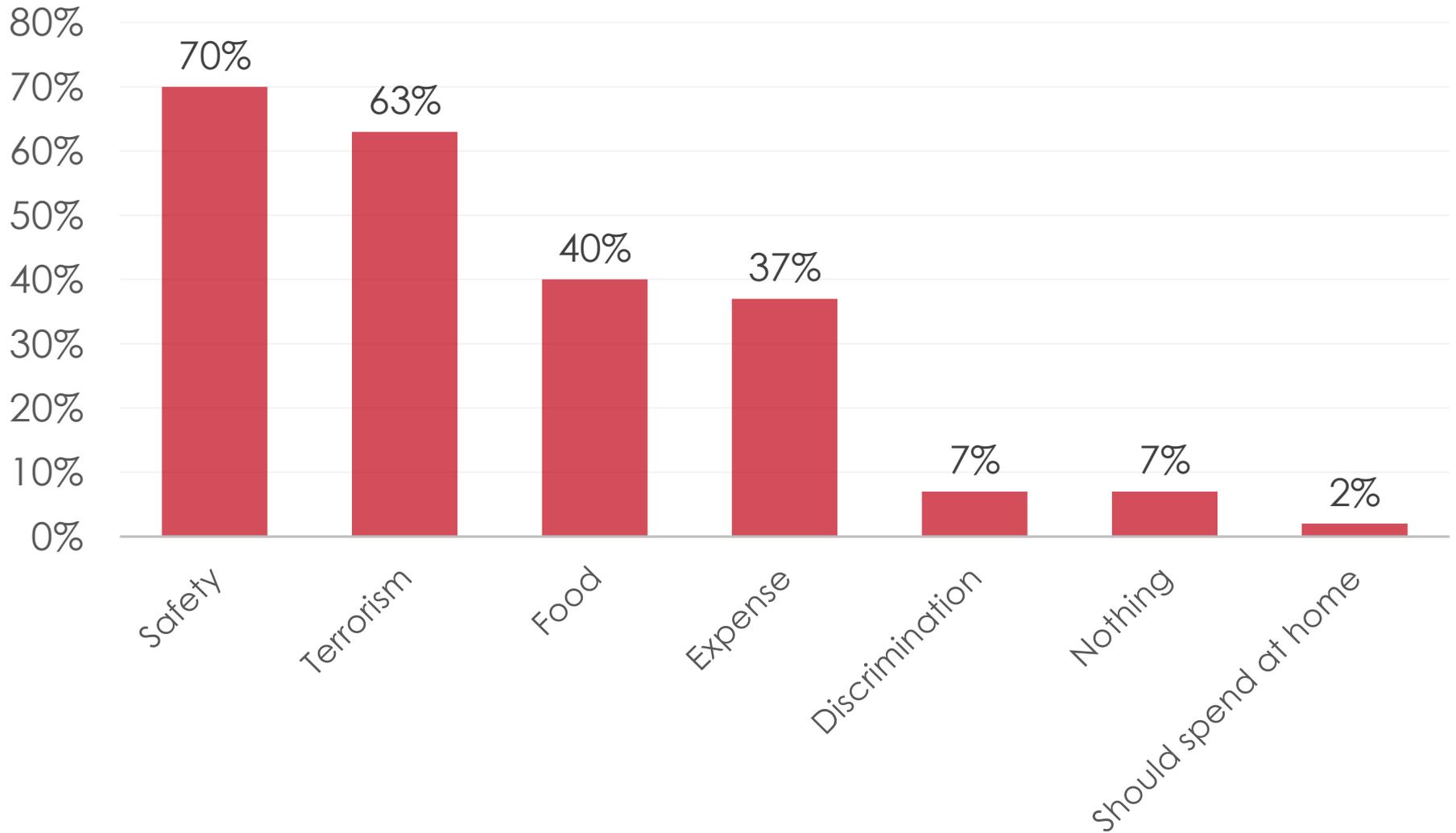
Will security screening/ immigration at Guam Airport impact future travel to Guam?



What would it take to make you stay an extra day on Guam?



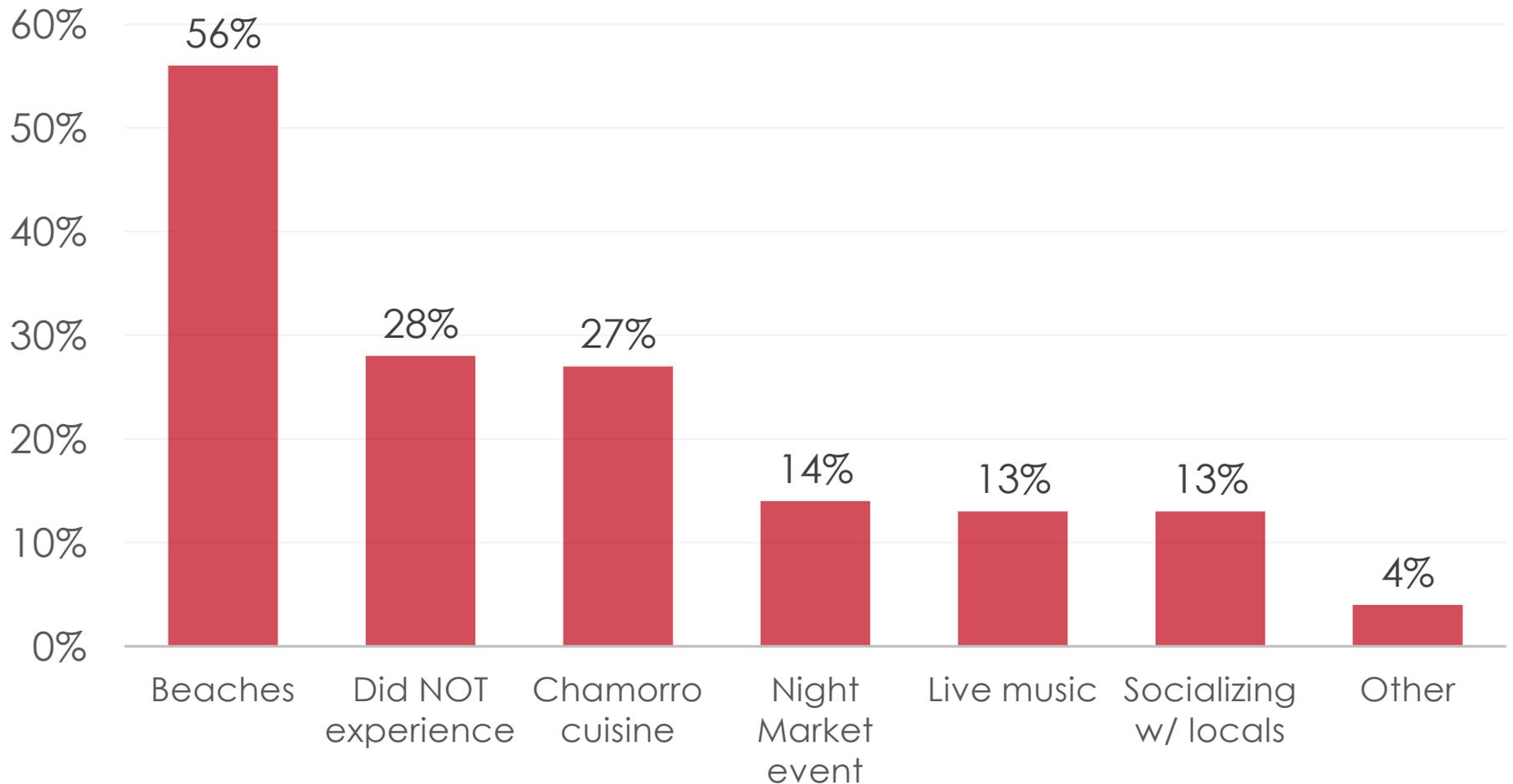
FUTURE TRAVEL CONCERNS



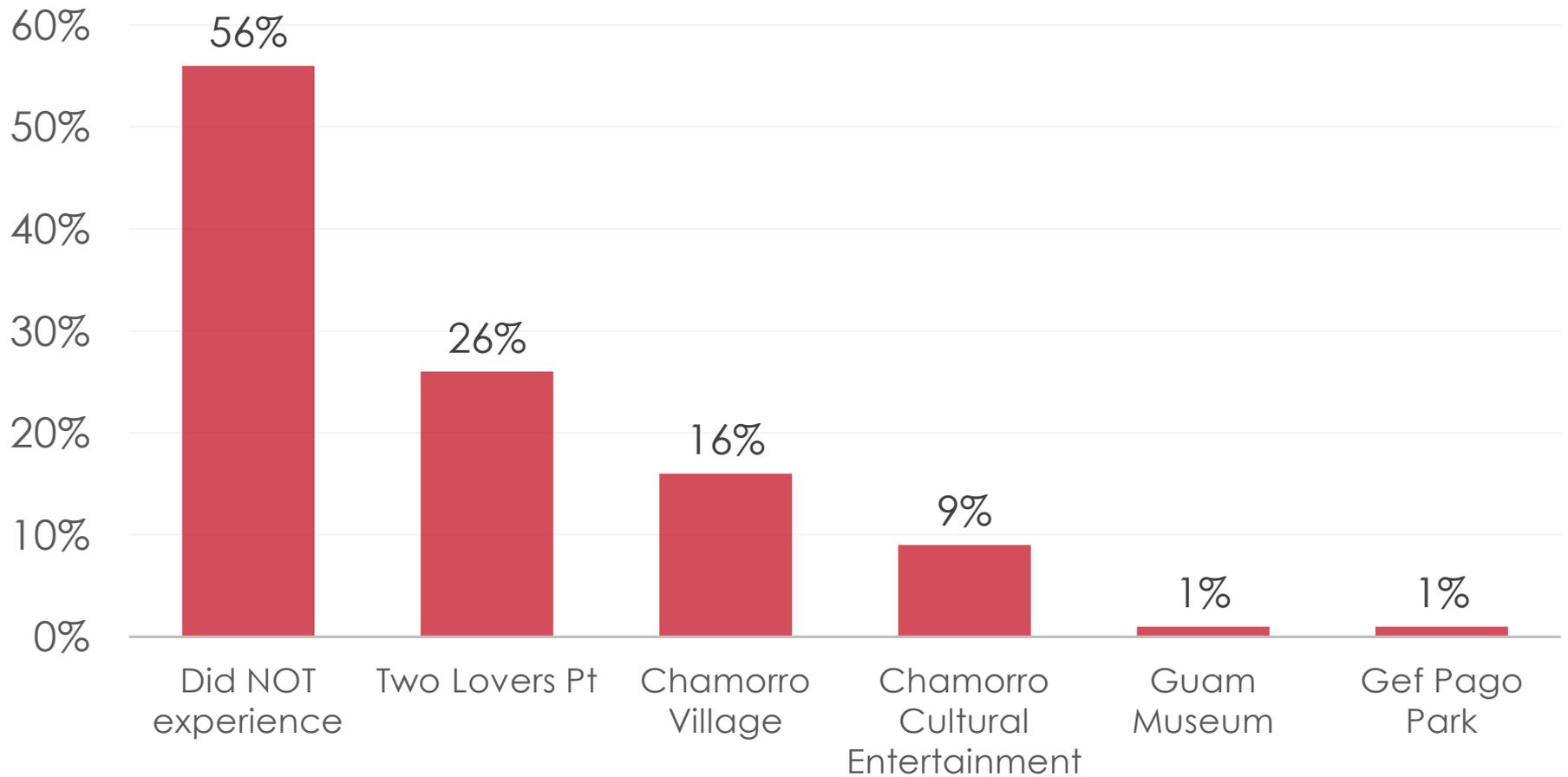
SECTION 7

GUAM CULTURE

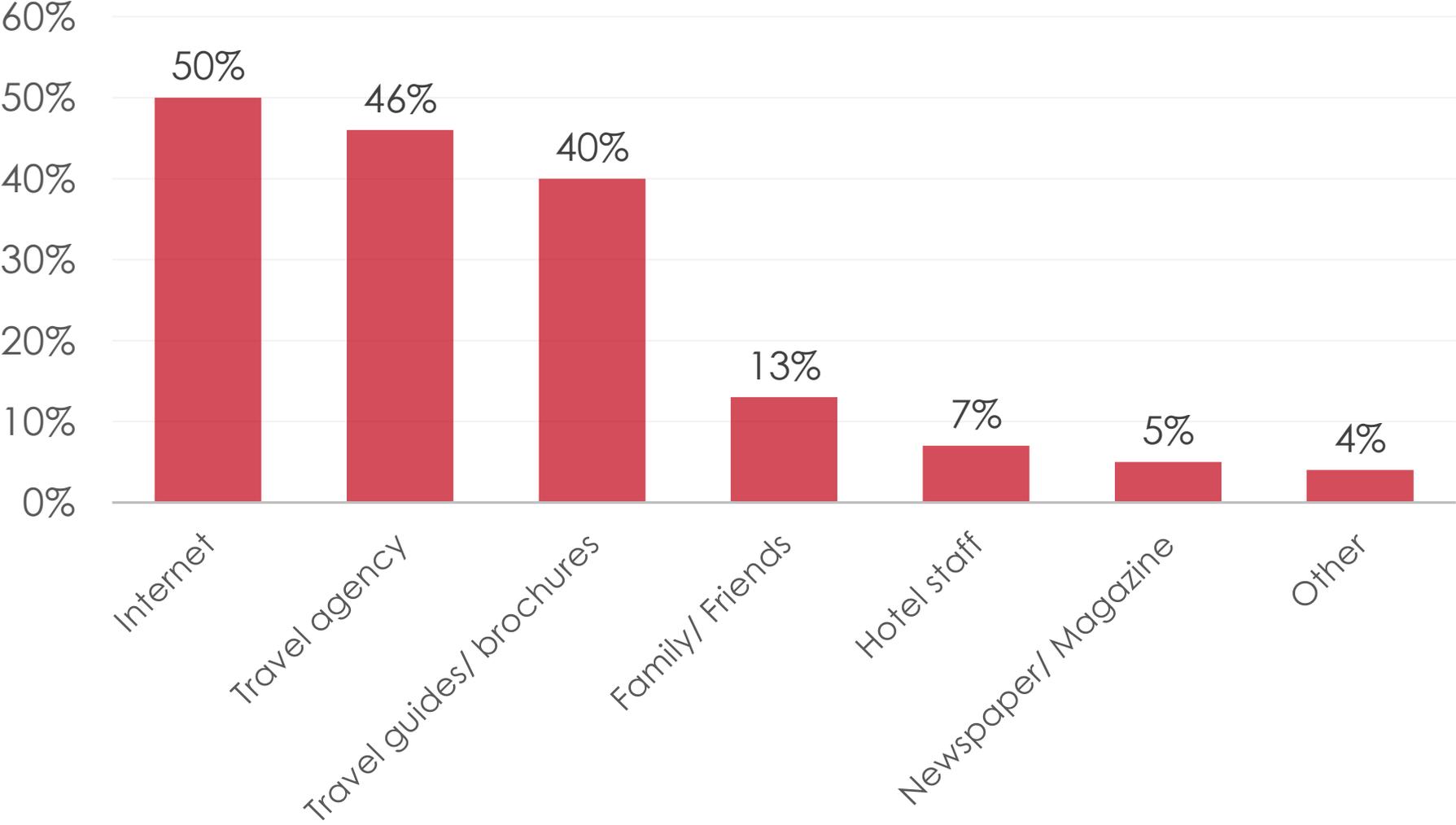
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



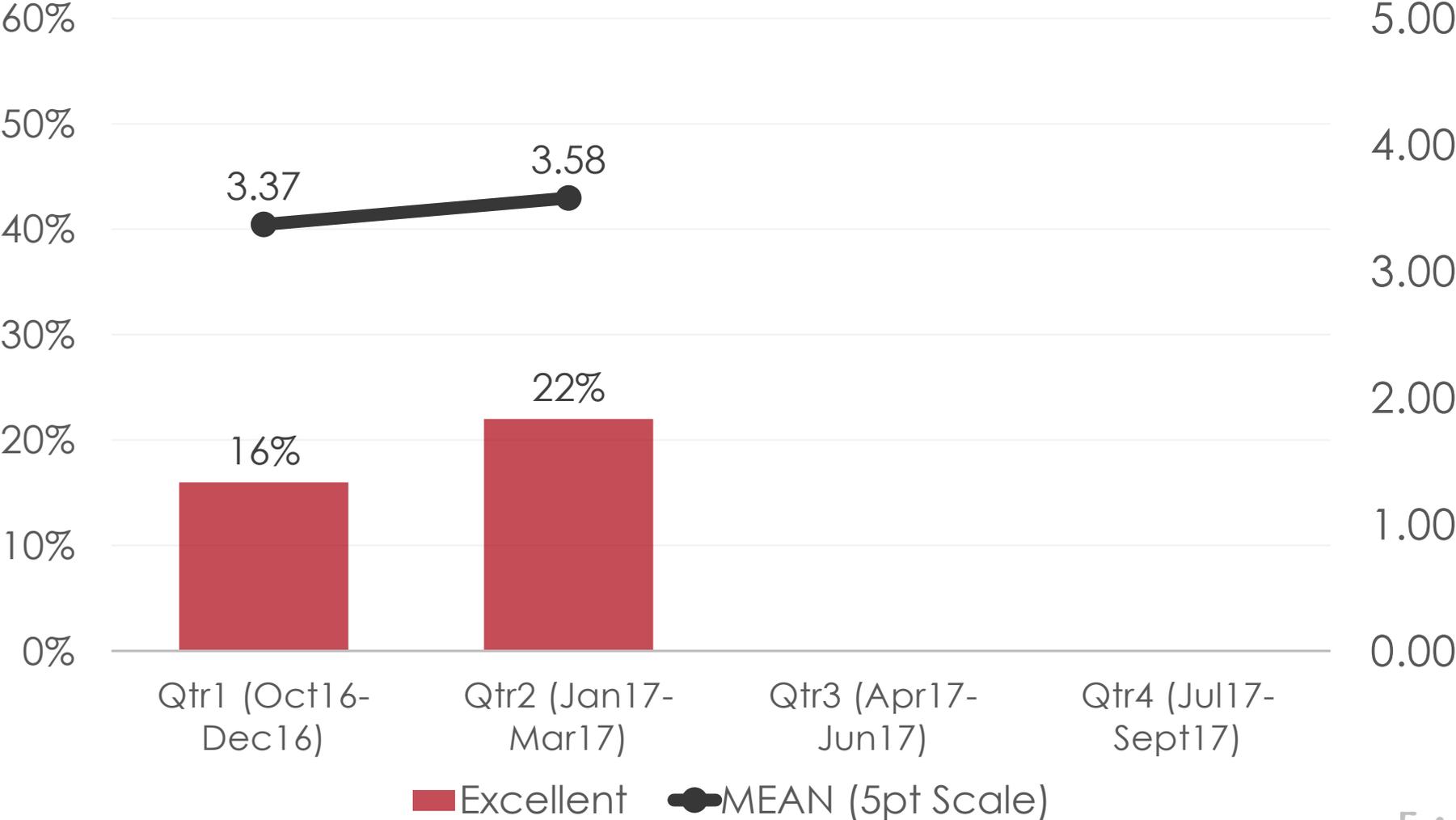
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



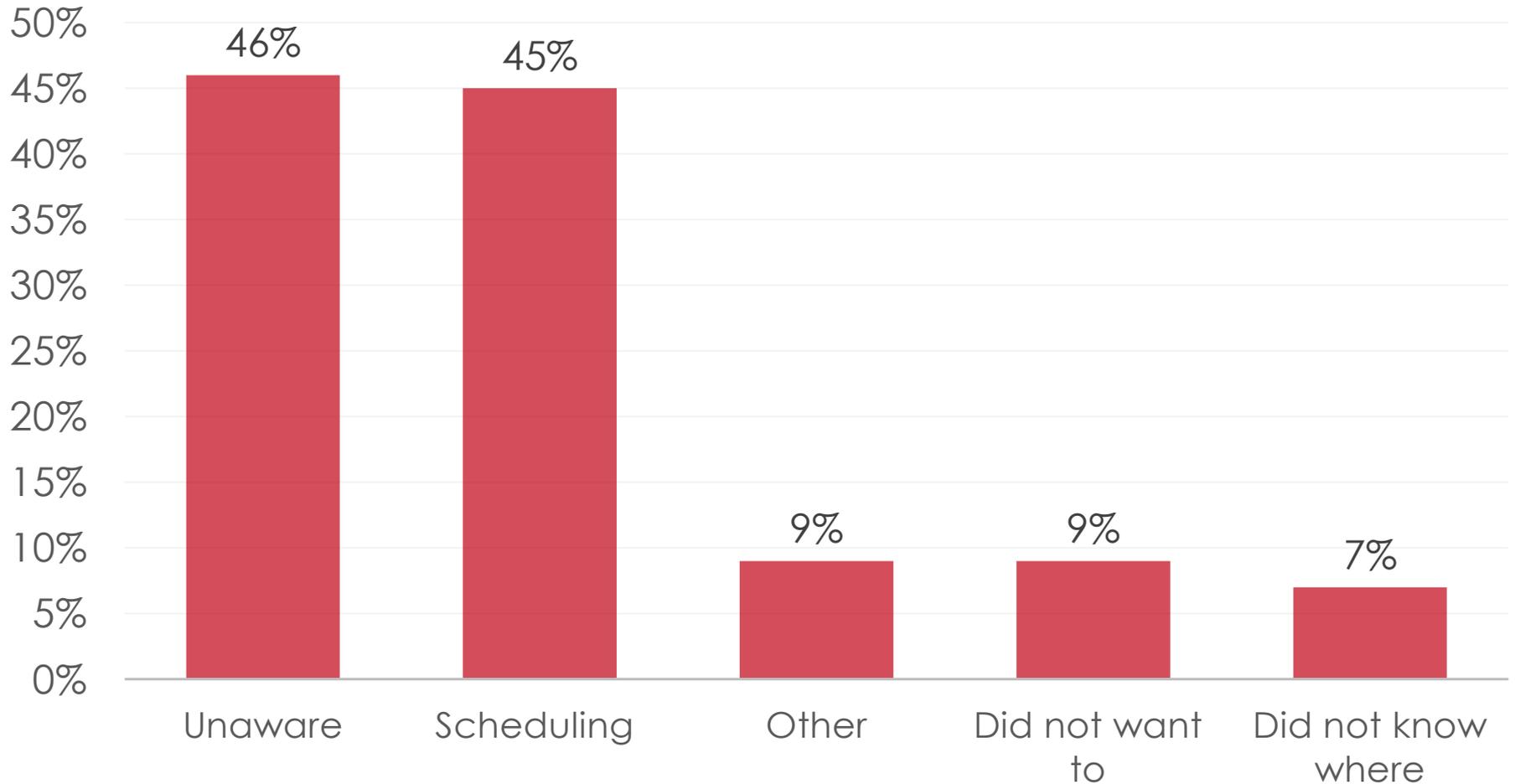
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers- Overall Satisfaction

| Comparison of Drivers of Overall Satisfaction, 1st and 2nd Qtr. 2017, and Overall 1-2 Qtr. 2017 | | | |
|--|-----------------|------------------|------------------------------|
| | 1st Qtr 2017 | 2nd Qtr. 2017 | Combined 1-2 Qtr. 2017 |
| Drivers: | rank | rank | rank |
| Quality & Cleanliness of beaches & parks | 5 | 1 | 4 |
| Ease of getting around | | | 9 |
| Safety walking around at night | | | |
| Quality of daytime tours | | | 6 |
| Variety of daytime tours | | | |
| Quality of nighttime tours | | | |
| Variety of nighttime tours | | | 8 |
| Quality of shopping | 3 | | |
| Variety of shopping | | 2 | 3 |
| Price of things on Guam | | | |
| Quality of hotel accommodations | 2 | 3 | 2 |
| Quality/cleanliness of air, sky | | | |
| Quality/cleanliness of parks | | | |
| Quality of landscape in Tumon | | | 7 |
| Quality of landscape in Guam | 1 | 4 | 1 |
| Quality of ground handler | 4 | | 5 |
| Quality/cleanliness of transportation vehicles | | | |
| % of Overall Satisfaction Accounted For | 48.8% | 50.1% | 46.8% |
| NOTE: Only significant drivers are included. | | | |

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the 2nd Quarter FY2017 Period. By rank order they are:
 - **Quality & cleanliness of beaches & parks,**
 - **Variety of shopping,**
 - **Quality of hotel accommodations, and**
 - **Quality of landscape in Guam.**
- With this factor the overall r^2 is .501 meaning that **50.1% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

| Comparison of Drivers of Per Person On-Island Expenditures, 2nd Qtr. 2017 and Overall 1st and 2nd Qtr. 2017 | | | |
|--|-----------------|------------------|------------------------------|
| | 1st Qtr 2017 | 2nd Qtr. 2017 | Combined 1-2 Qtr. 2017 |
| Drivers: | rank | rank | rank |
| Quality & Cleanliness of beaches & parks | | 5 | |
| Ease of getting around | | | |
| Safety walking around at night | | 3 | |
| Quality of daytime tours | | | |
| Variety of daytime tours | | | |
| Quality of nighttime tours | | | |
| Variety of nighttime tours | | | |
| Quality of shopping | 1 | | 3 |
| Variety of shopping | | | |
| Price of things on Guam | | | |
| Quality of hotel accommodations | | 2 | 1 |
| Quality/cleanliness of air, sky | | | |
| Quality/cleanliness of parks | | | |
| Quality of landscape in Tumon | | 4 | |
| Quality of landscape in Guam | | | |
| Quality of ground handler | | | |
| Quality/cleanliness of transportation vehicles | | 1 | 2 |
| % of Per Person On Island Expenditures Accounted For | 1.2% | 3.4% | 1.3% |
| NOTE: Only significant drivers are included. | | | |

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by five significant factors in the 2nd Quarter FY2017 period. By rank order they are:
 - **Quality/cleanliness of transportation vehicles,**
 - **Quality of hotel accommodations,**
 - **Safety walking around at night,**
 - **Quality of landscape in Tumon, and**
 - **Quality & cleanliness of beaches & parks.**
- With these factors the overall r^2 is .034 meaning that **3.4% of per person on island expenditure is accounted for by these factors.**