

Guam Visitors Bureau

Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.4 (JUL-SEPT 2018)

Prepared by: Anthology Research

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#instaGuam



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 **1,092** 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 **1,092** is +/- 2.97 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 +/- 2.97 percentage points.

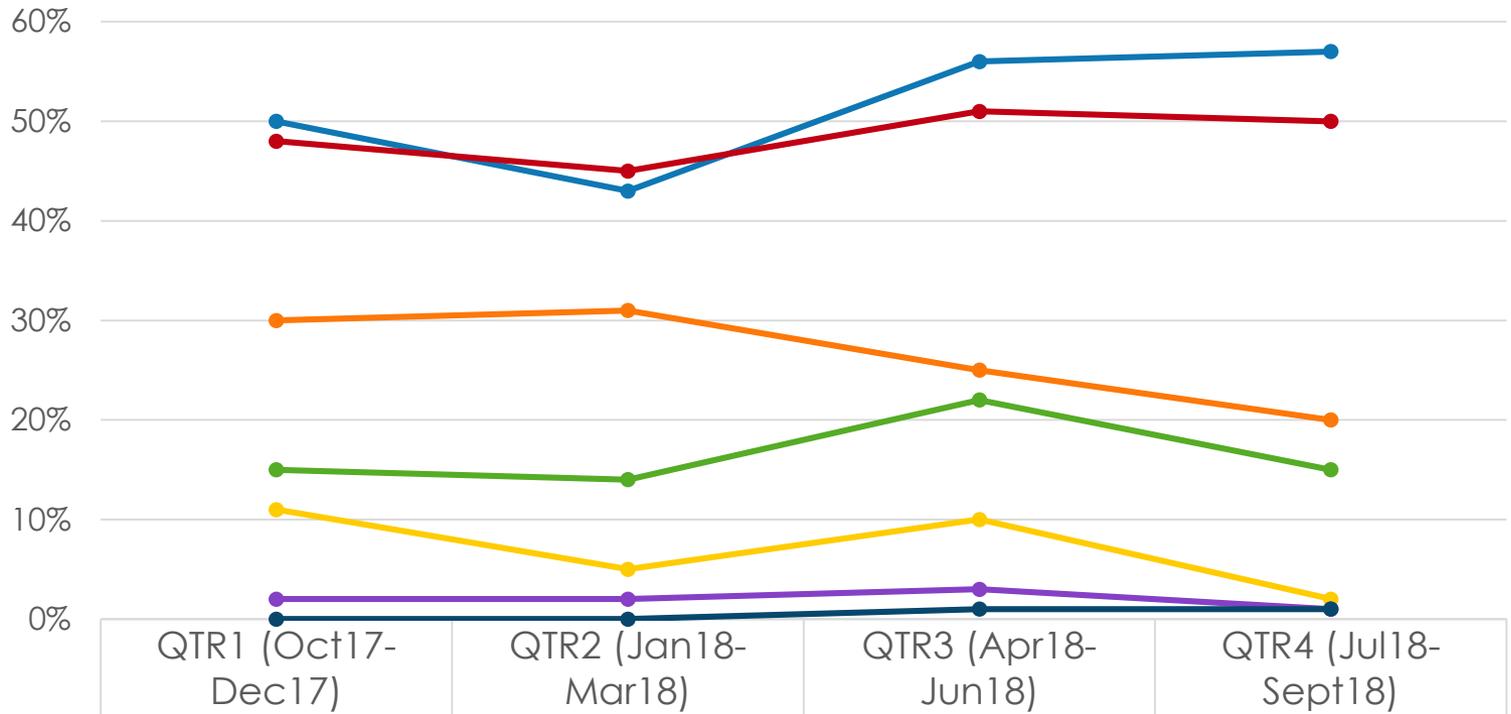
Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japan visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan 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

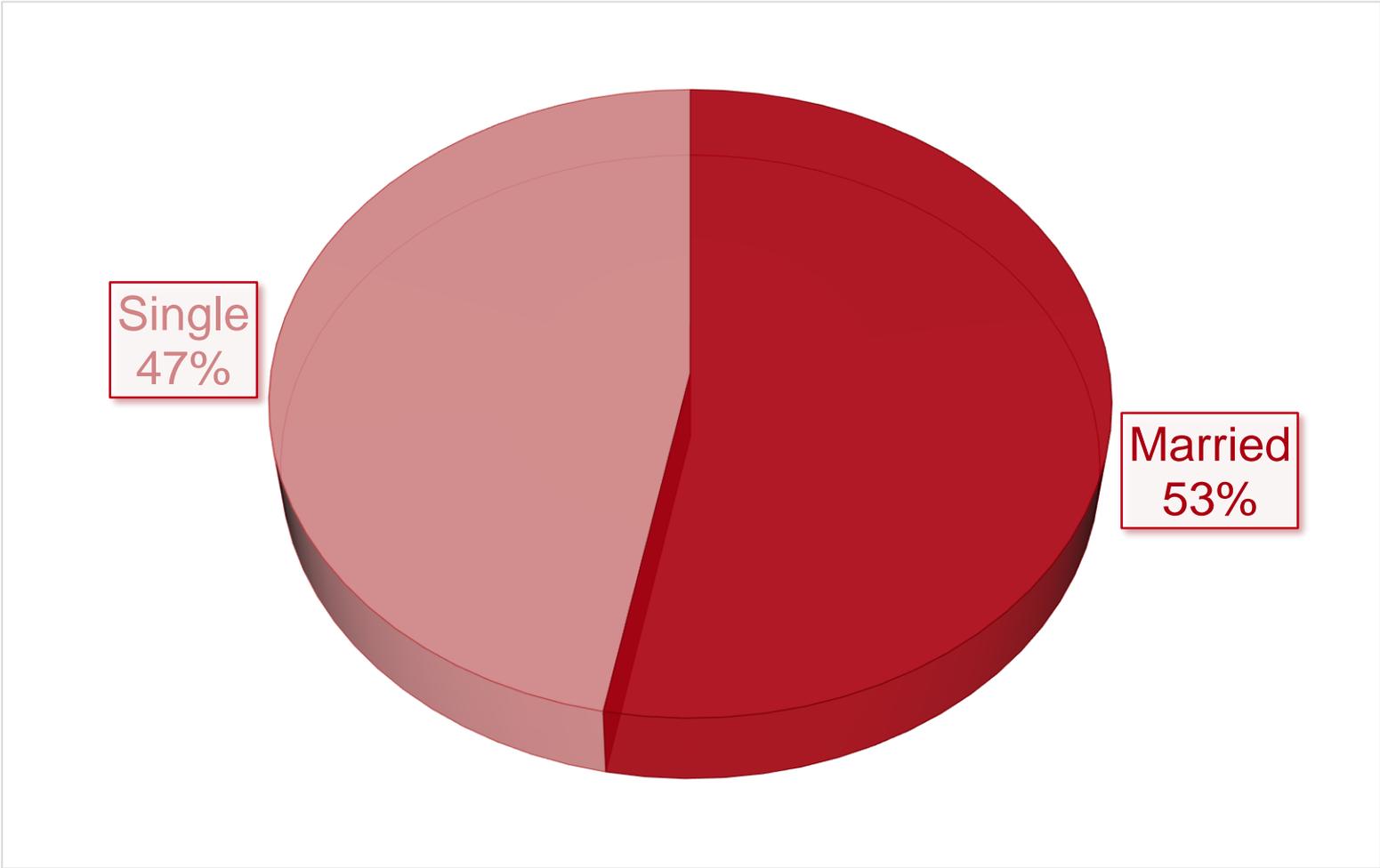


Family	50%	43%	56%	57%
Repeat	48%	45%	51%	50%
Office Lady	15%	14%	22%	15%
Wedding	11%	5%	10%	2%
Silver	2%	2%	3%	1%
Group	30%	31%	25%	20%
MICE	0%	0%	1%	1%

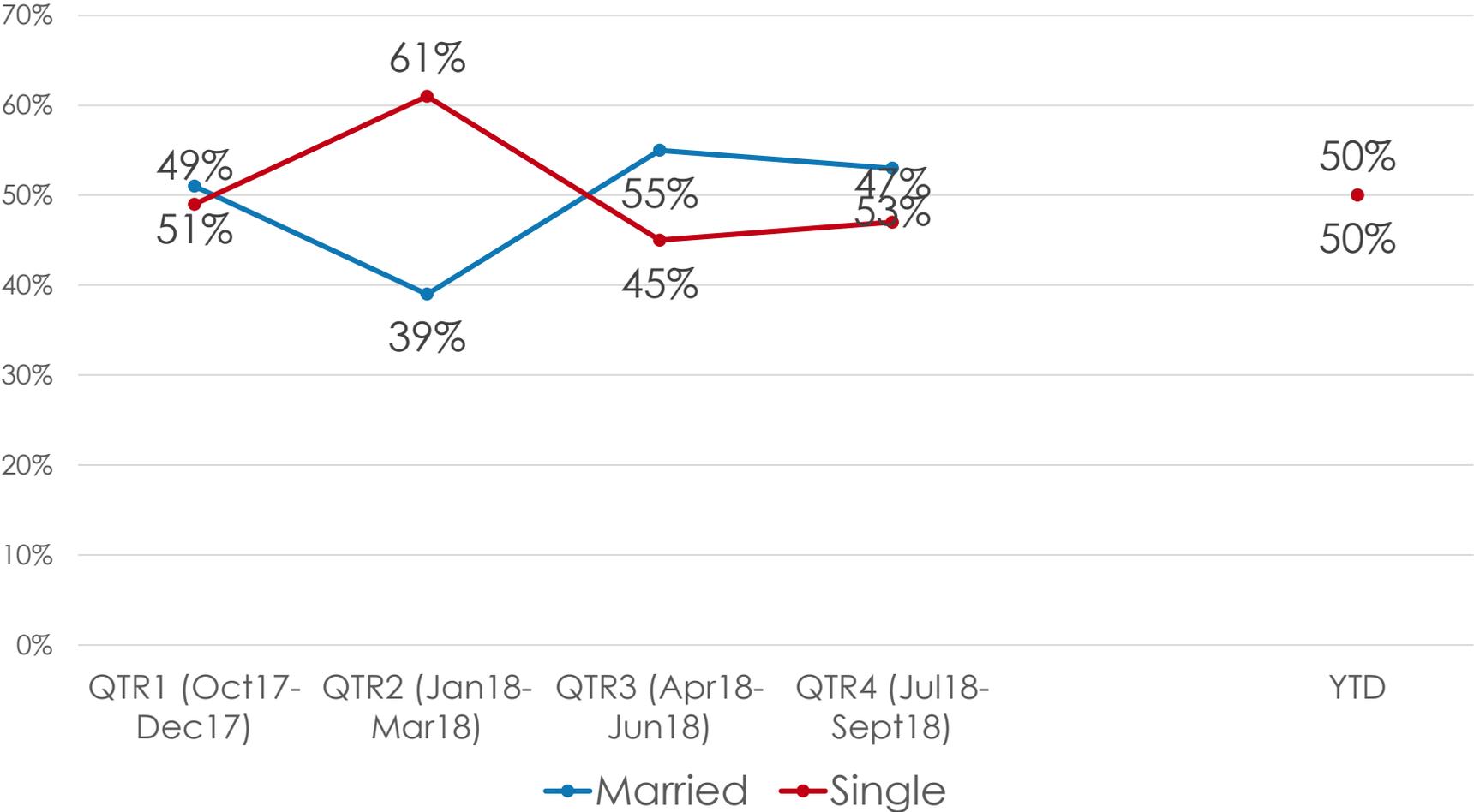
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2018 Tracking



Marital status – Key Segments

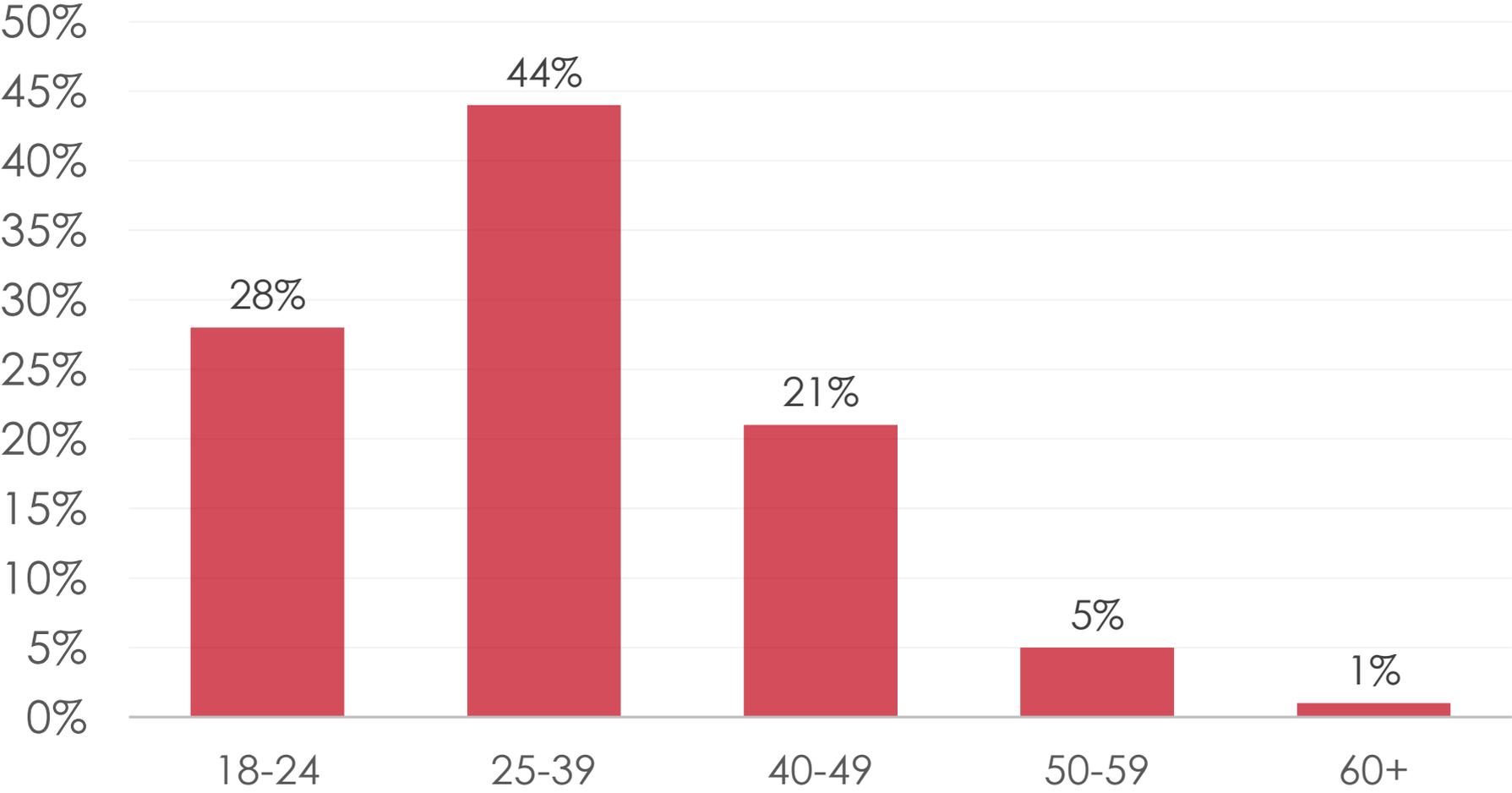
**GVB EXIT SURVEY
QE MARITAL STATUS**

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
QE	Married	53%	86%	63%	43%	100%	50%	85%	55%
	Single	47%	14%	37%	57%		50%	15%	45%
	Total	1092	620	542	168	16	6	27	214

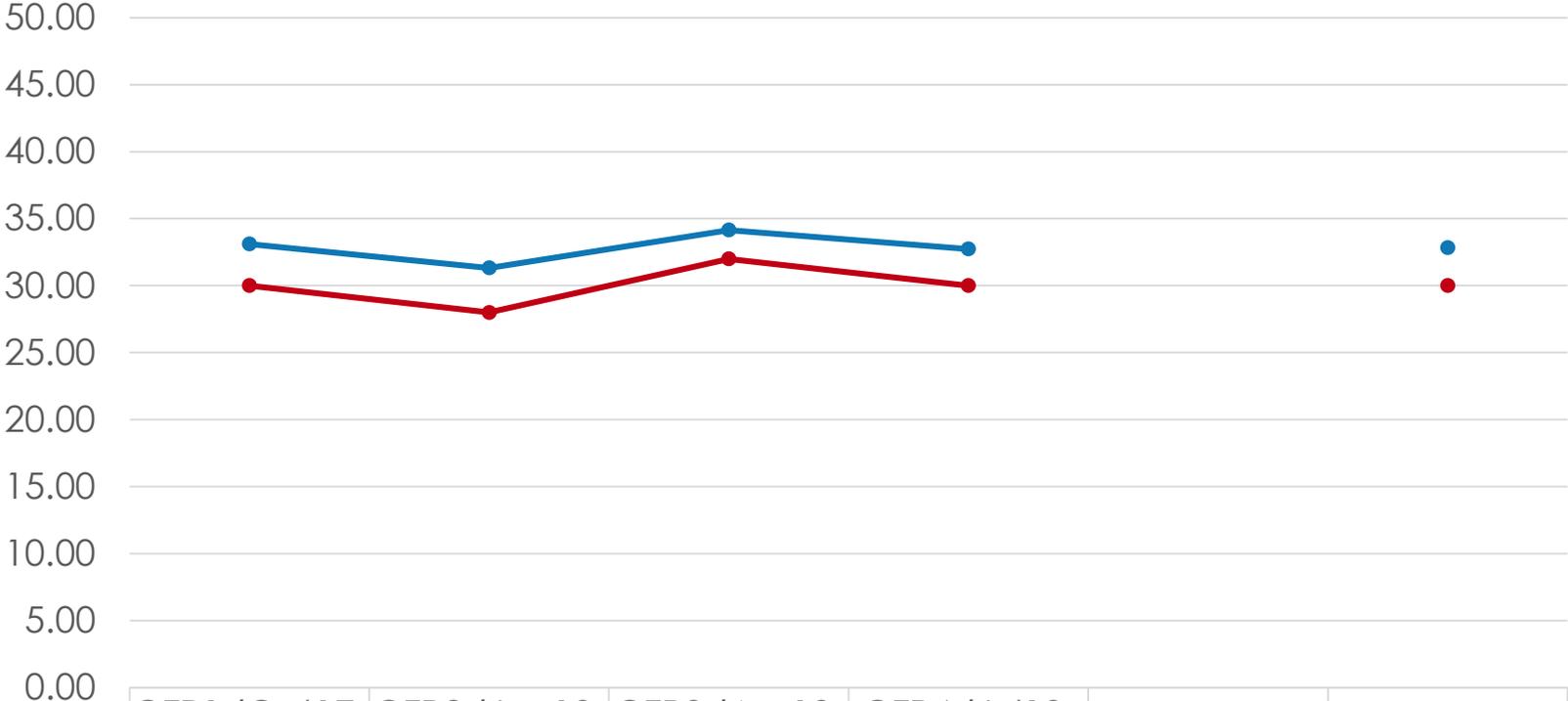
Prepared by Anthology Research

Age

MEAN = 32.73
MEDIAN = 30



Age – FY2018 Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)		YTD
MEAN	33.11	31.32	34.15	32.73		32.84
MEDIAN	30	28	32	30		30

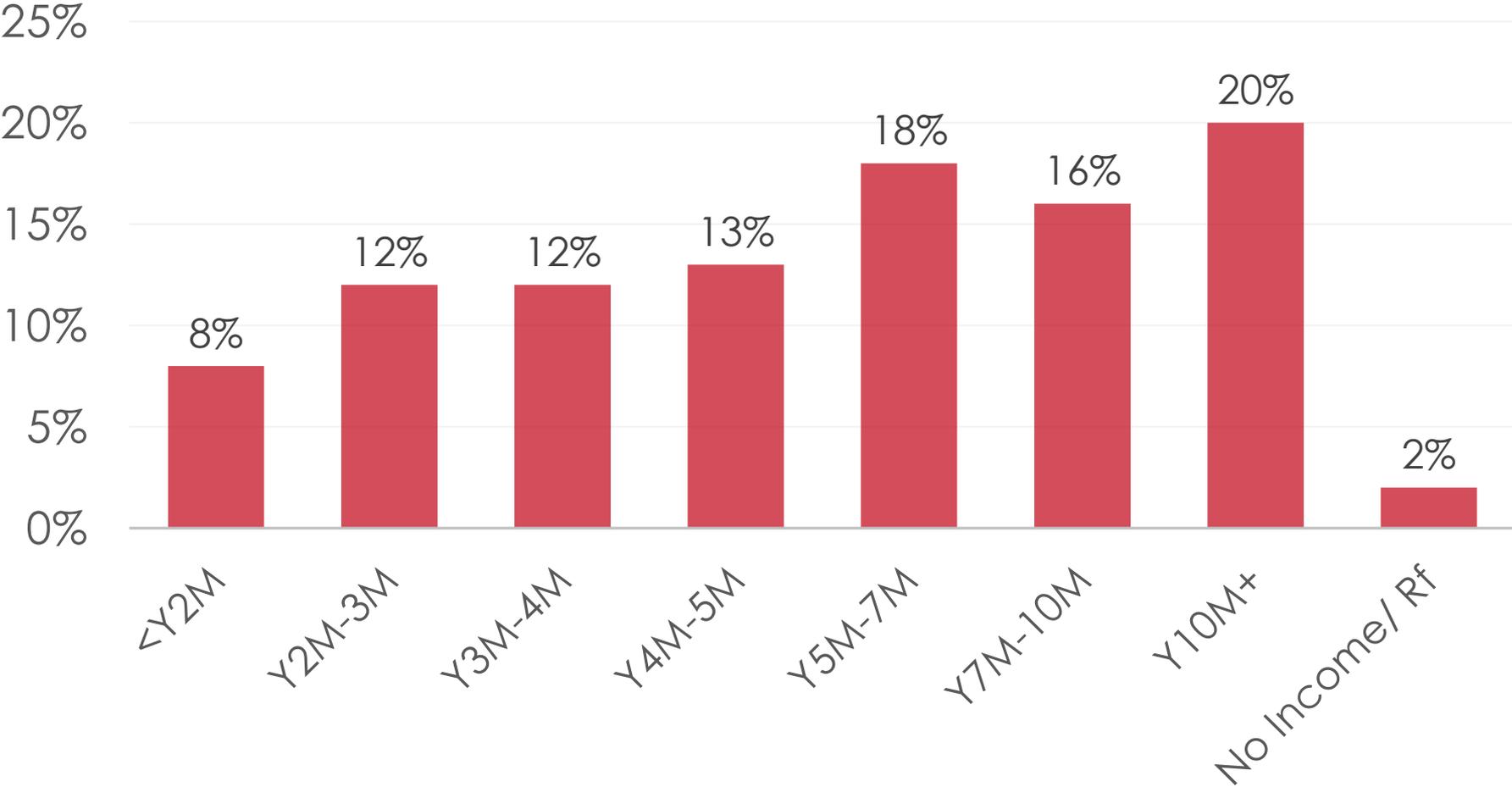
Age – Key Segments

GVB EXIT SURVEY AGE

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
QF	18-24	28%	8%	15%	26%		17%	15%	29%
	25-39	44%	49%	45%	49%		67%	70%	35%
	40-49	21%	34%	30%	19%				25%
	50-59	5%	7%	7%	6%		17%	7%	8%
	60+	1%	2%	2%		100%		7%	3%
	Total	1092	620	542	168	16	6	27	214
QF	Mean	32.73	37.43	36.33	32.23	63.94	34.17	32.85	34.49
	Median	30	38	36	29	63	35	29	33

Prepared by Anthology Research

Annual Household Income



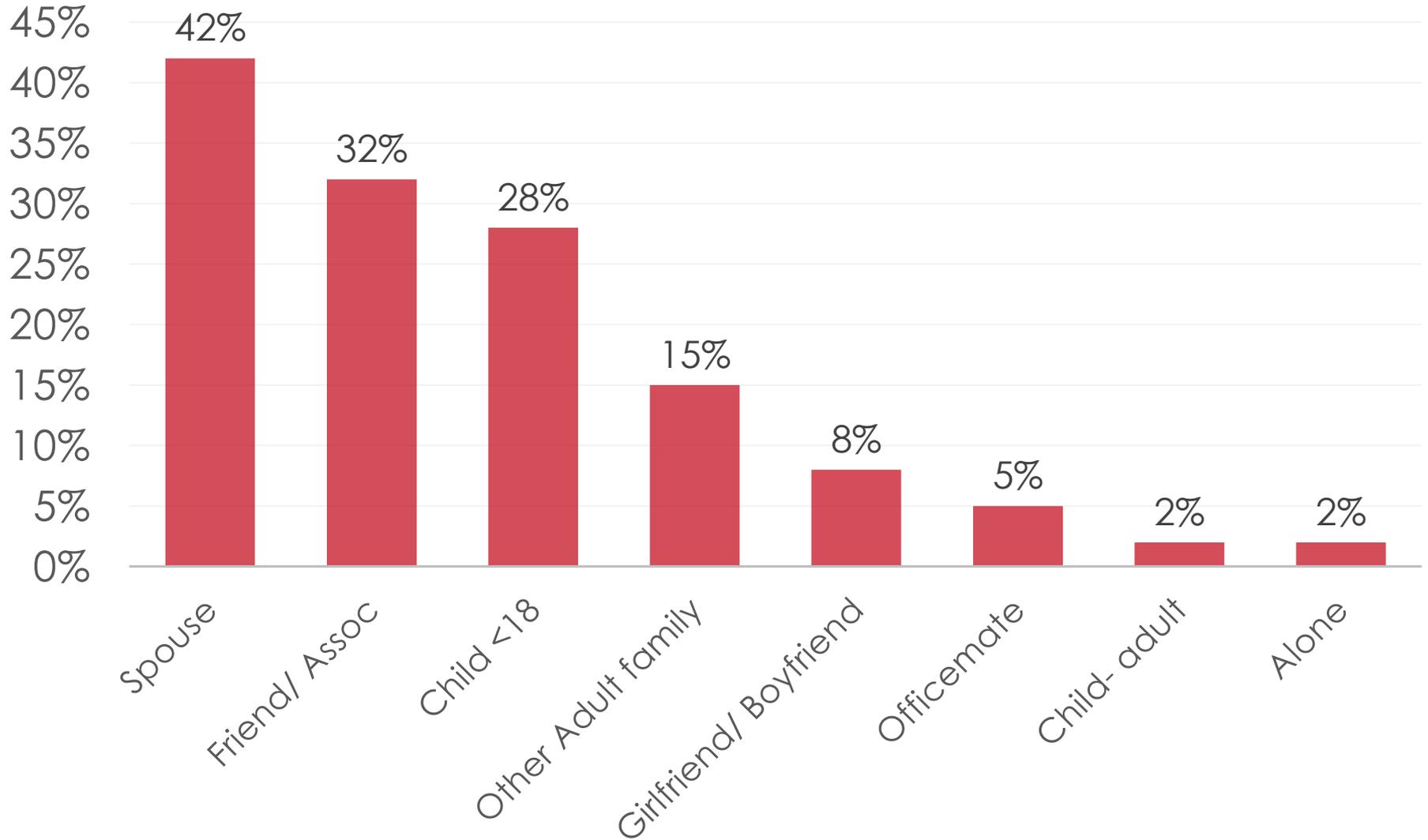
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

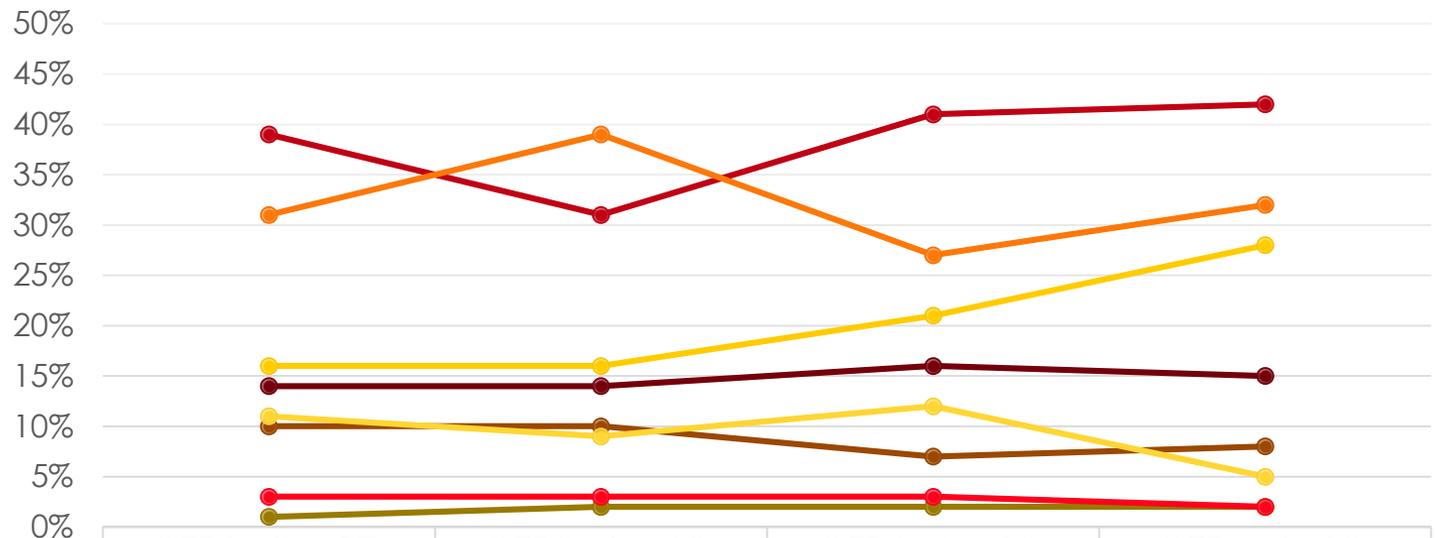
		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q26	Less than ¥2 million	8%	5%	5%	8%	20%		11%	6%
	¥2,000,001 ~ ¥3,000,000	12%	6%	9%	24%	7%		15%	16%
	¥3,000,001 ~ ¥4,000,000	12%	8%	12%	14%	7%	33%	11%	12%
	¥4,000,001 ~ ¥5,000,000	13%	13%	11%	15%	27%	17%	7%	13%
	¥5,000,001 ~ ¥7,000,000	18%	19%	18%	15%	7%	17%	19%	18%
	¥7,000,001 ~ ¥10 million	16%	23%	17%	12%	13%		26%	14%
	¥10 million or more	20%	25%	25%	12%	20%	17%	4%	18%
	No Income	2%	1%	2%			17%	7%	2%
	Total	1049	597	524	164	15	6	27	207

Prepared by Anthology Research

Travel Party



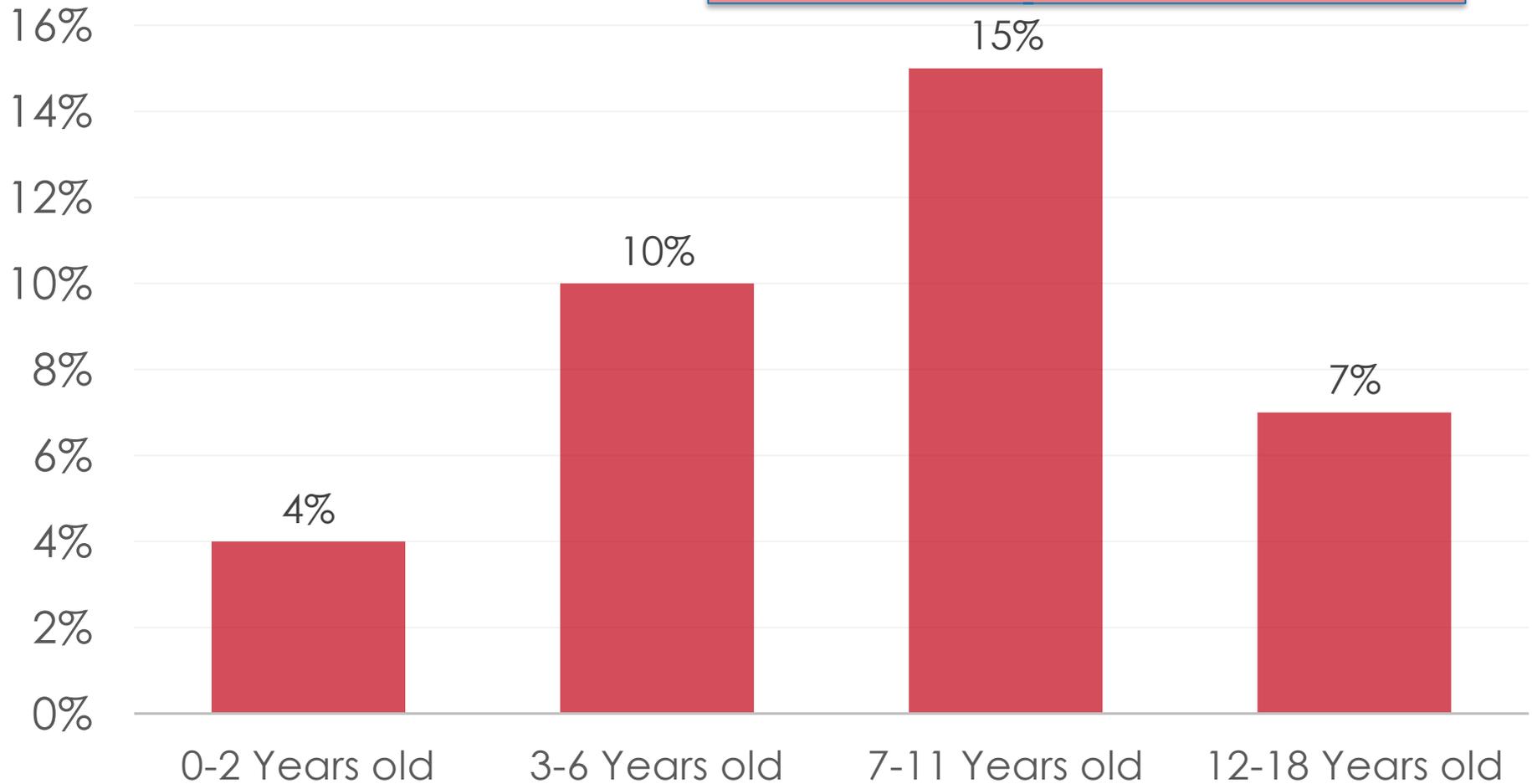
Travel Party



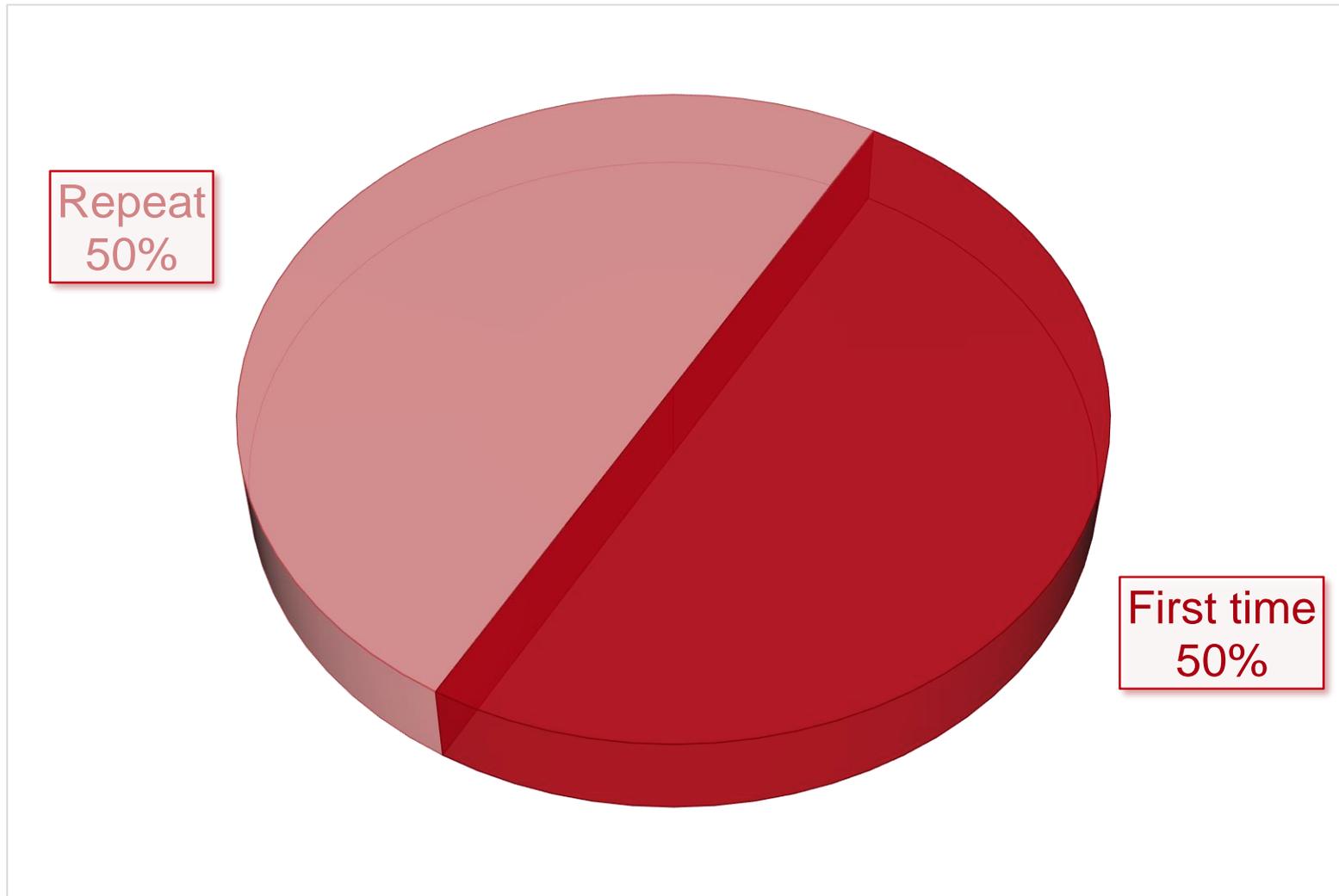
	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
Spouse	39%	31%	41%	42%
Child <18	16%	16%	21%	28%
Friend/ Assoc	31%	39%	27%	32%
Other Adult Family	14%	14%	16%	15%
Alone	1%	2%	2%	2%
Girlfriend/ Boyfriend	10%	10%	7%	8%
Child- Adult	3%	3%	3%	2%
Office	11%	9%	12%	5%

Travel Party - Children

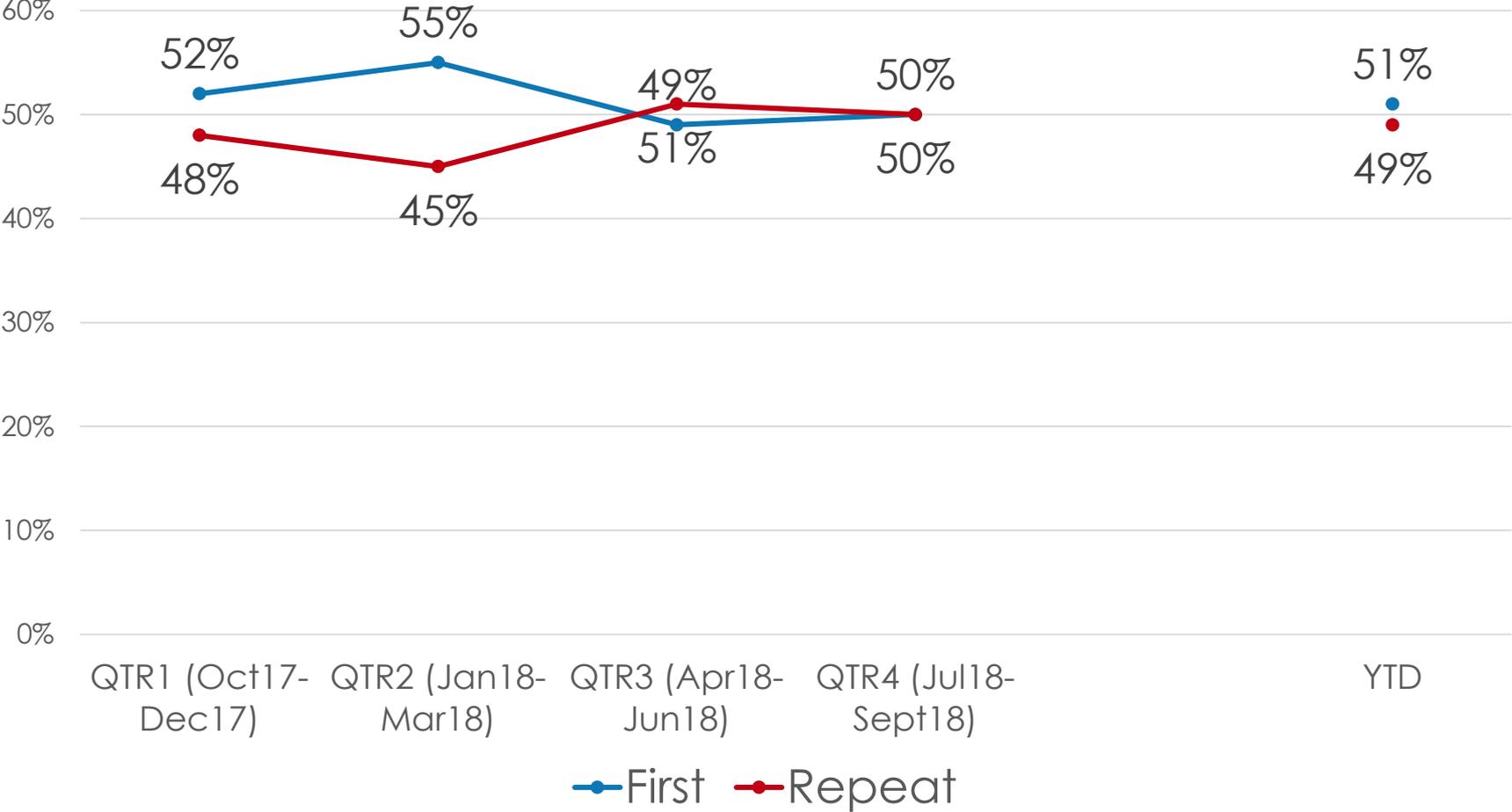
28% TRAVELING WITH A CHILD



Trips to Guam



Trips to Guam – FY2018 Tracking



Trips to Guam – Key Segments

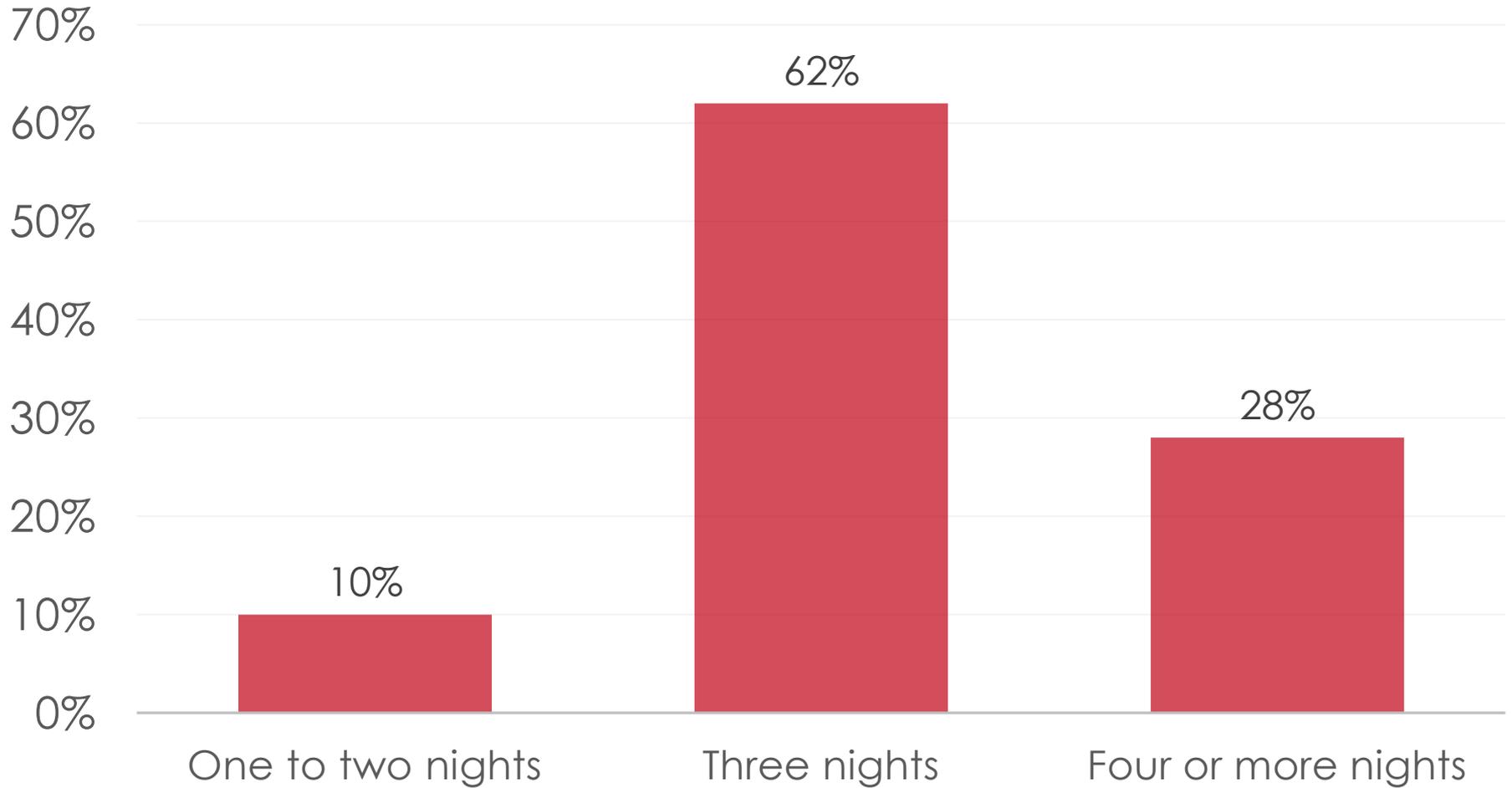
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q3	1st time	50%	42%		40%	19%	17%	52%	40%
	Repeat	50%	58%	100%	60%	81%	83%	48%	60%
	Total	1092	620	542	168	16	6	27	214
Q3	Mean	2.40	2.81	3.81	2.86	4.38	4.67	1.70	2.78
	Median	1	2	3	2	3	4	1	2

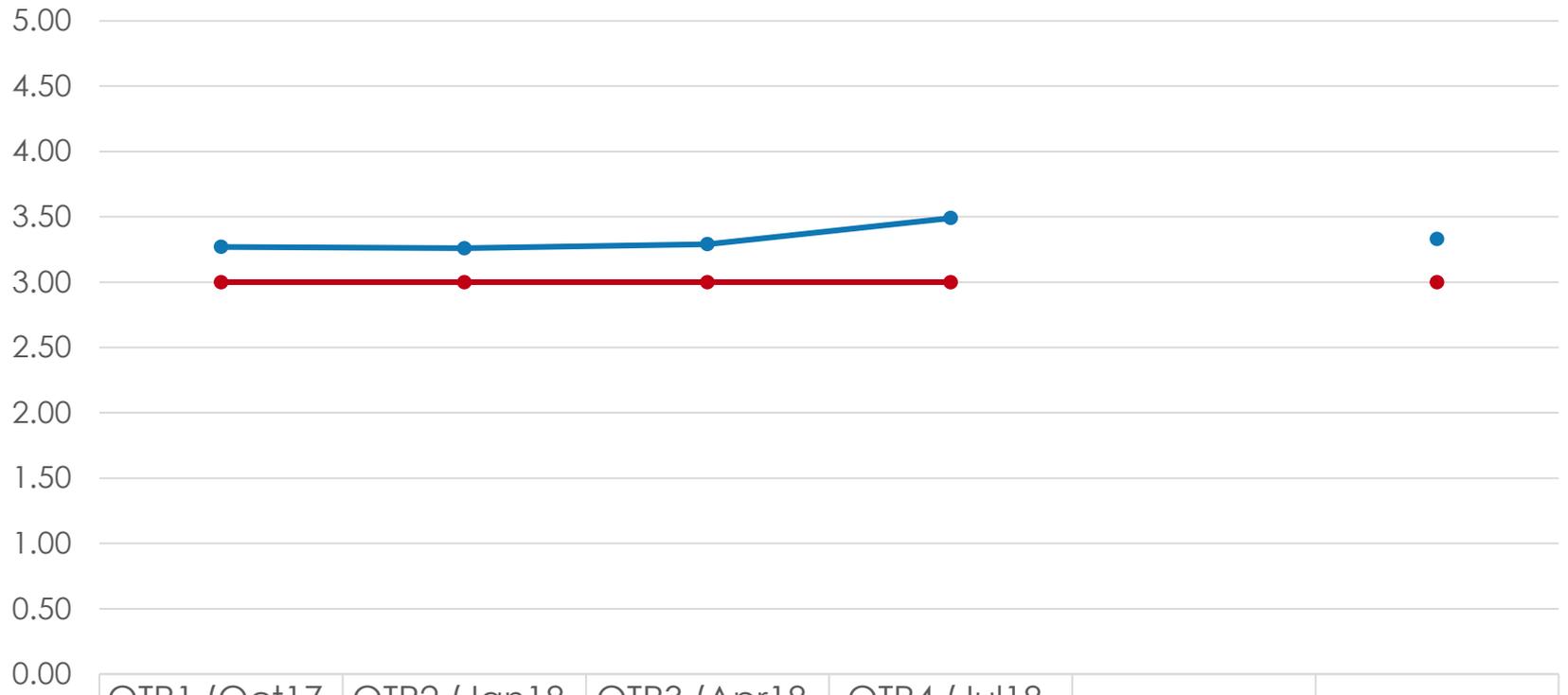
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 3.49
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay – FY2018 Tracking



	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)	YTD
MEAN	3.27	3.26	3.29	3.49	3.33
MEDIAN	3	3	3	3	3

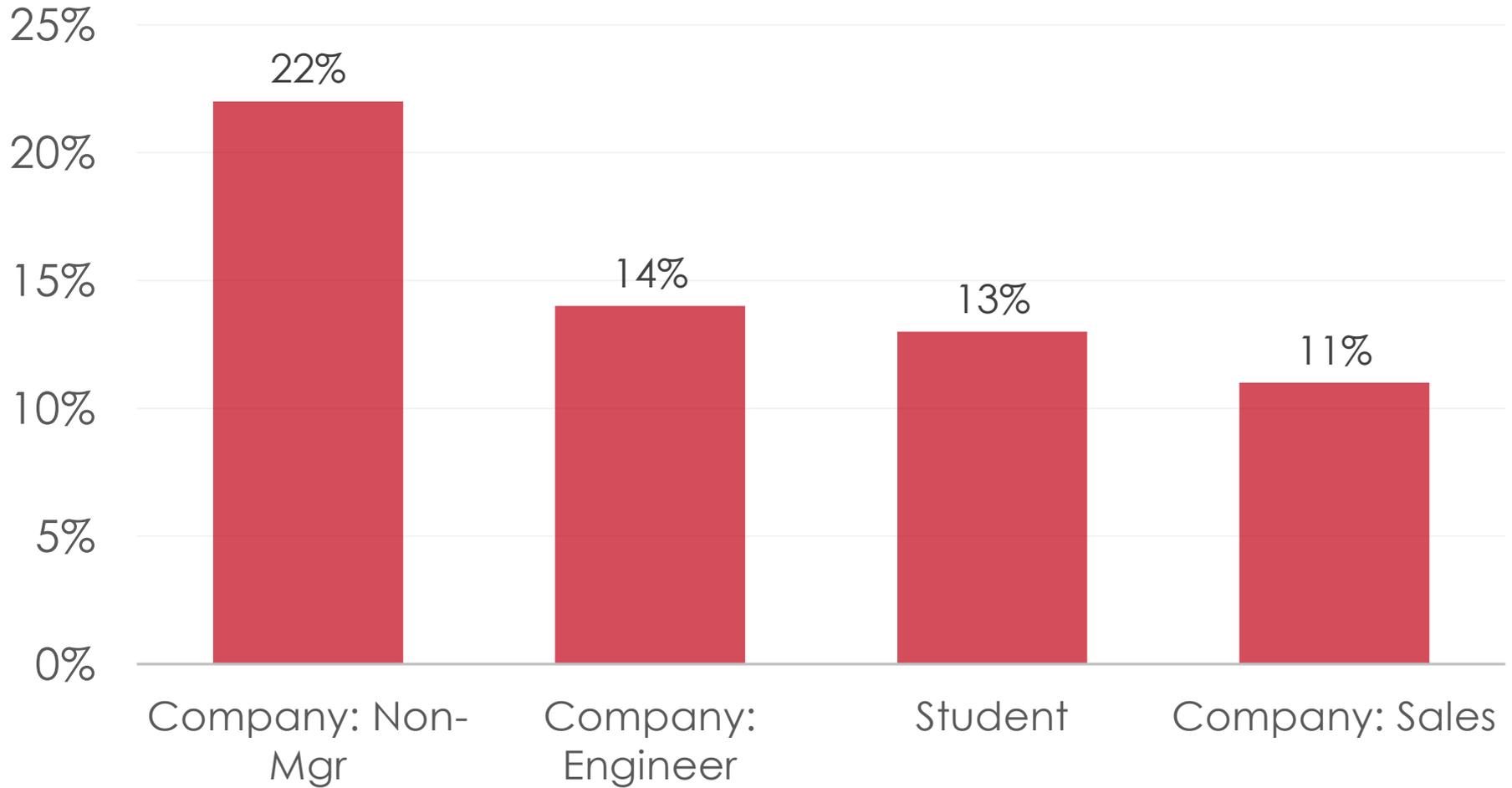
Length of Stay – Key Segments

GVB EXIT SURVEY
SA How many nights did you stay on Guam?

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
SA	1-2	10%	6%	11%	13%	19%			14%
	3	62%	55%	56%	60%	19%	83%	59%	64%
	4+	28%	39%	33%	27%	63%	17%	41%	22%
	Total	1092	620	542	168	16	6	27	214
SA	Mean	3.49	3.77	3.68	3.55	6.12	3.33	3.63	3.26
	Median	3	3	3	3	4	3	3	3

Prepared by Anthology Research

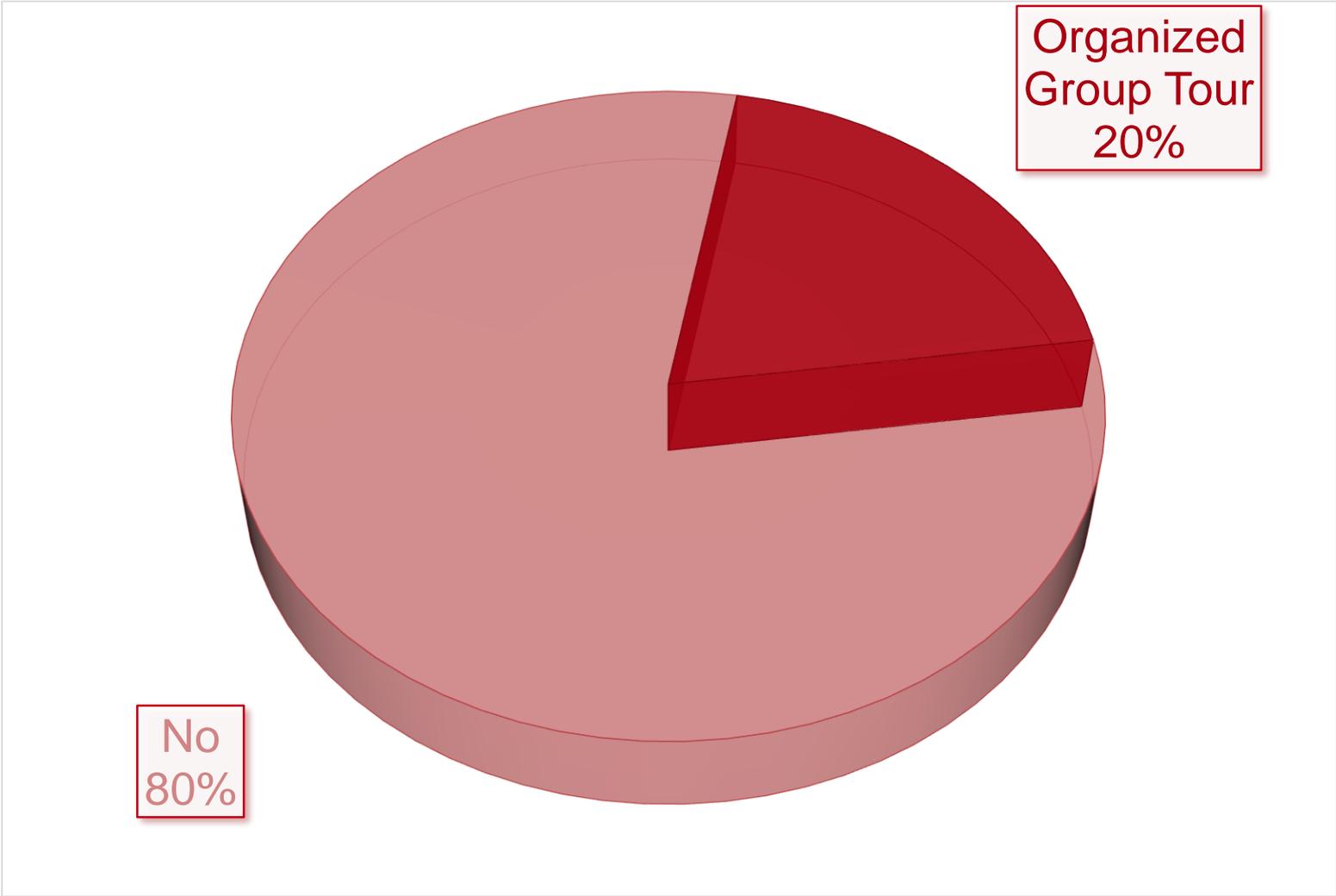
Occupation – Top Responses (10%+)



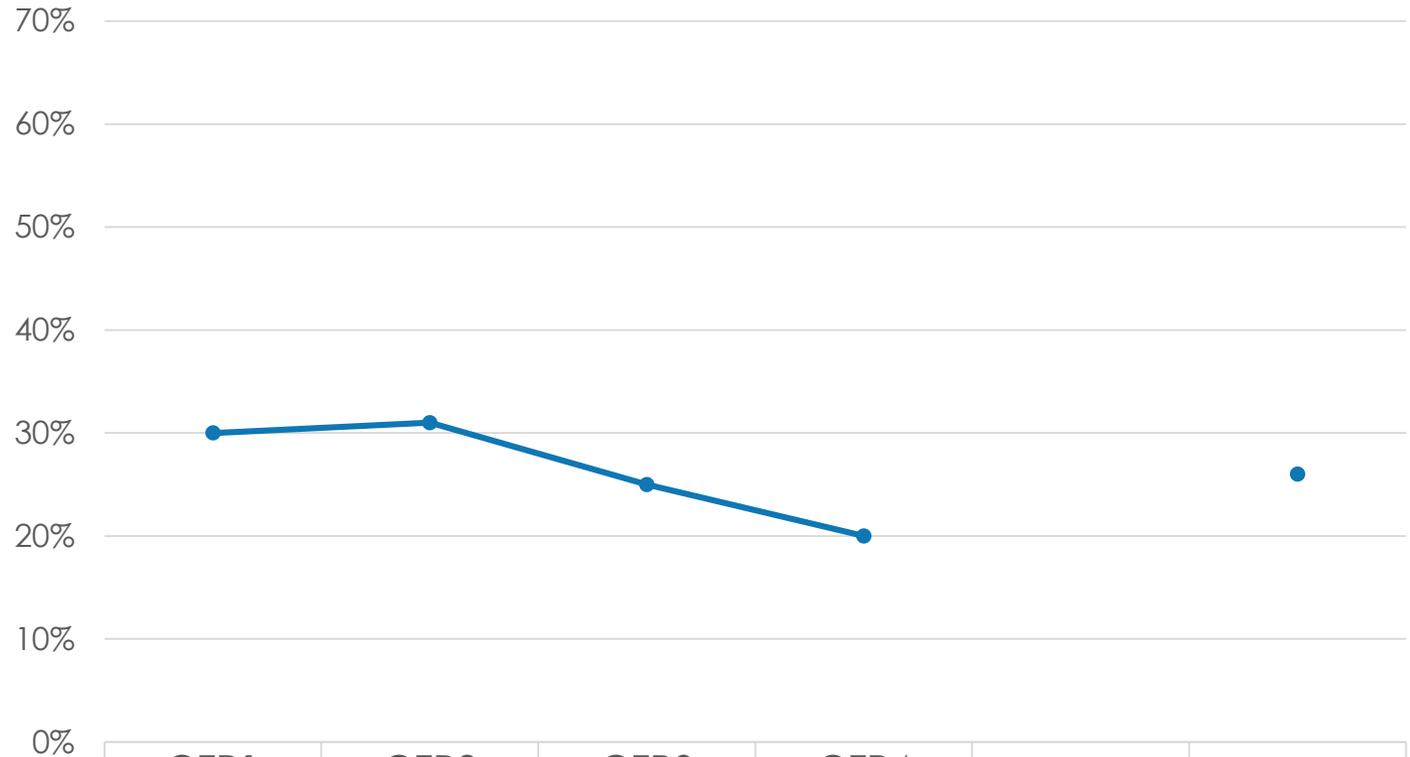
SECTION 2

TRAVEL PLANNING

Organized Group Tour



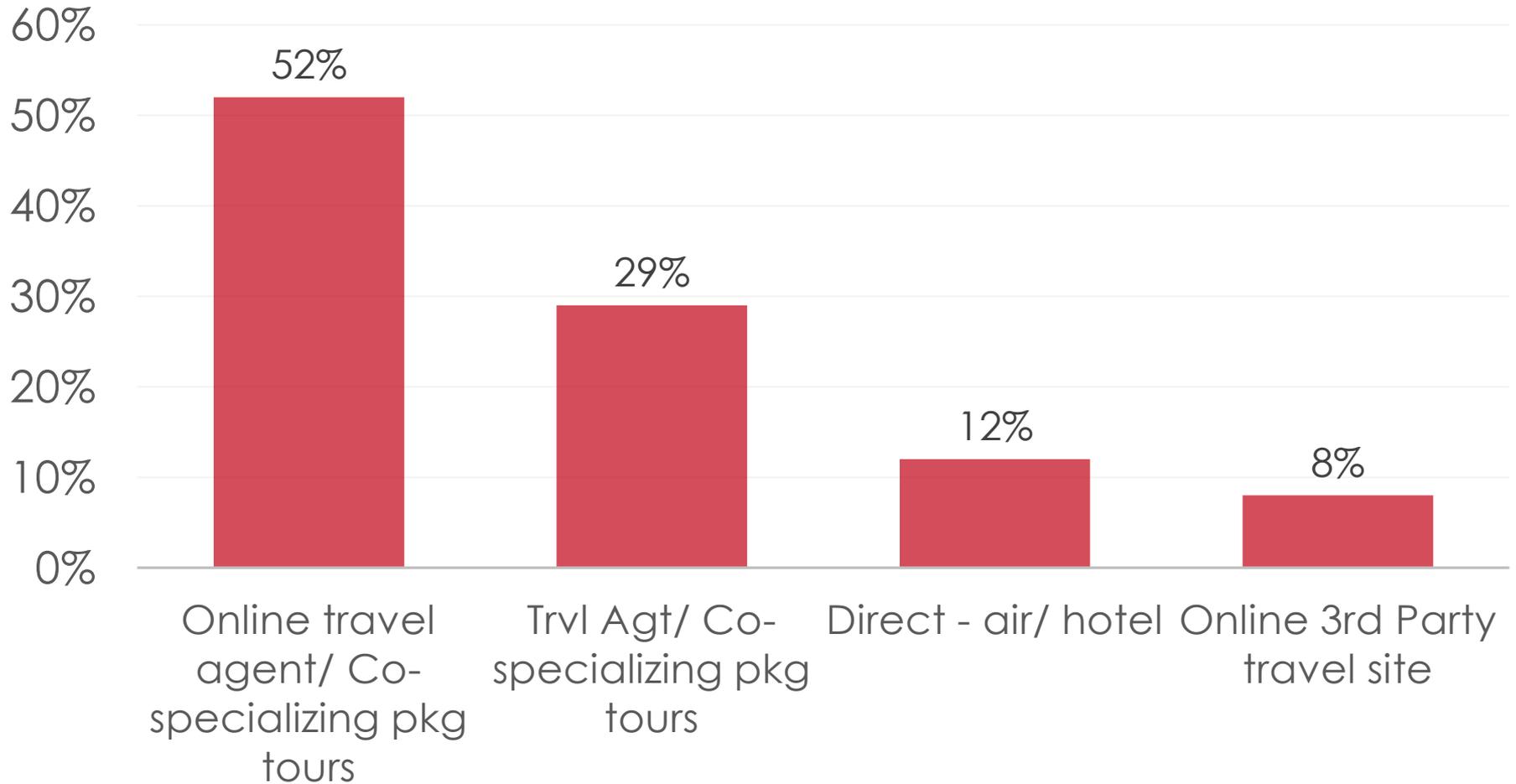
Organized Group Tour- Tracking



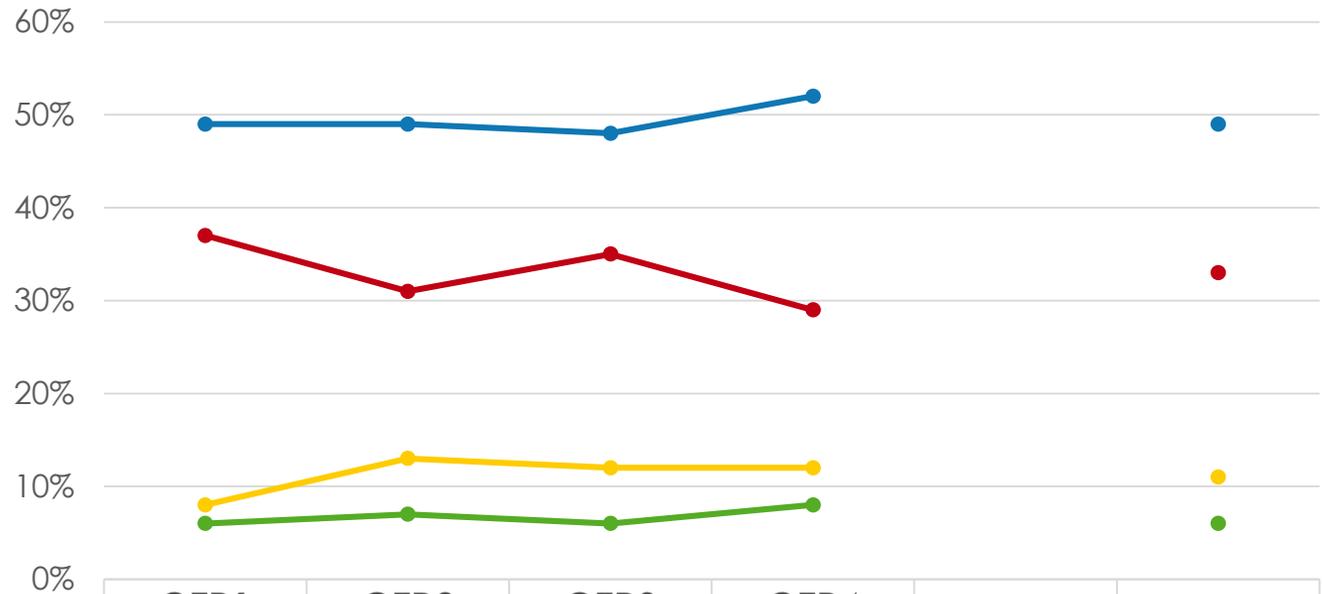
—● Organized Group Tour

	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)		YTD
	30%	31%	25%	20%		26%

Travel Arrangements - Sources

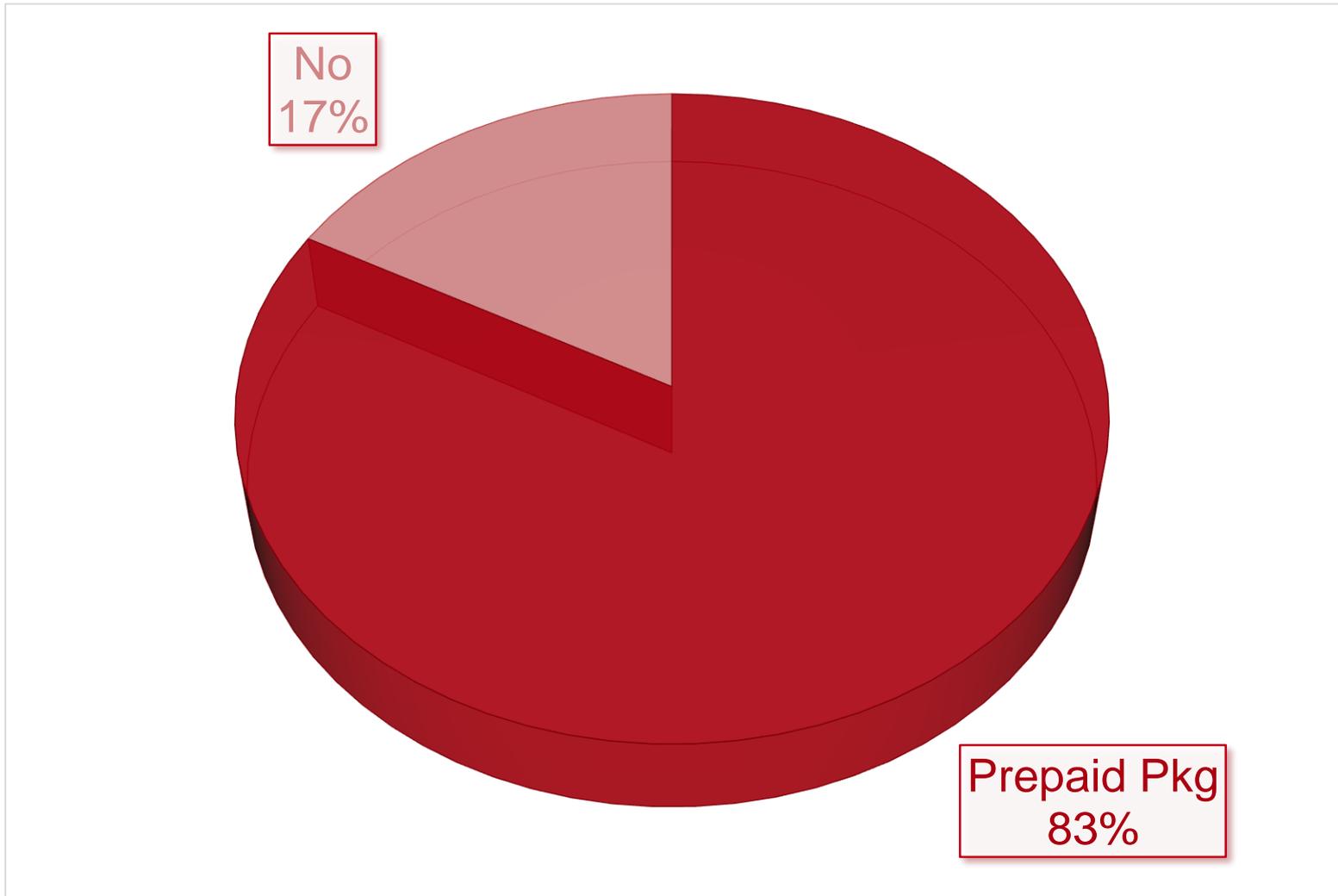


Travel Arrangements - Sources

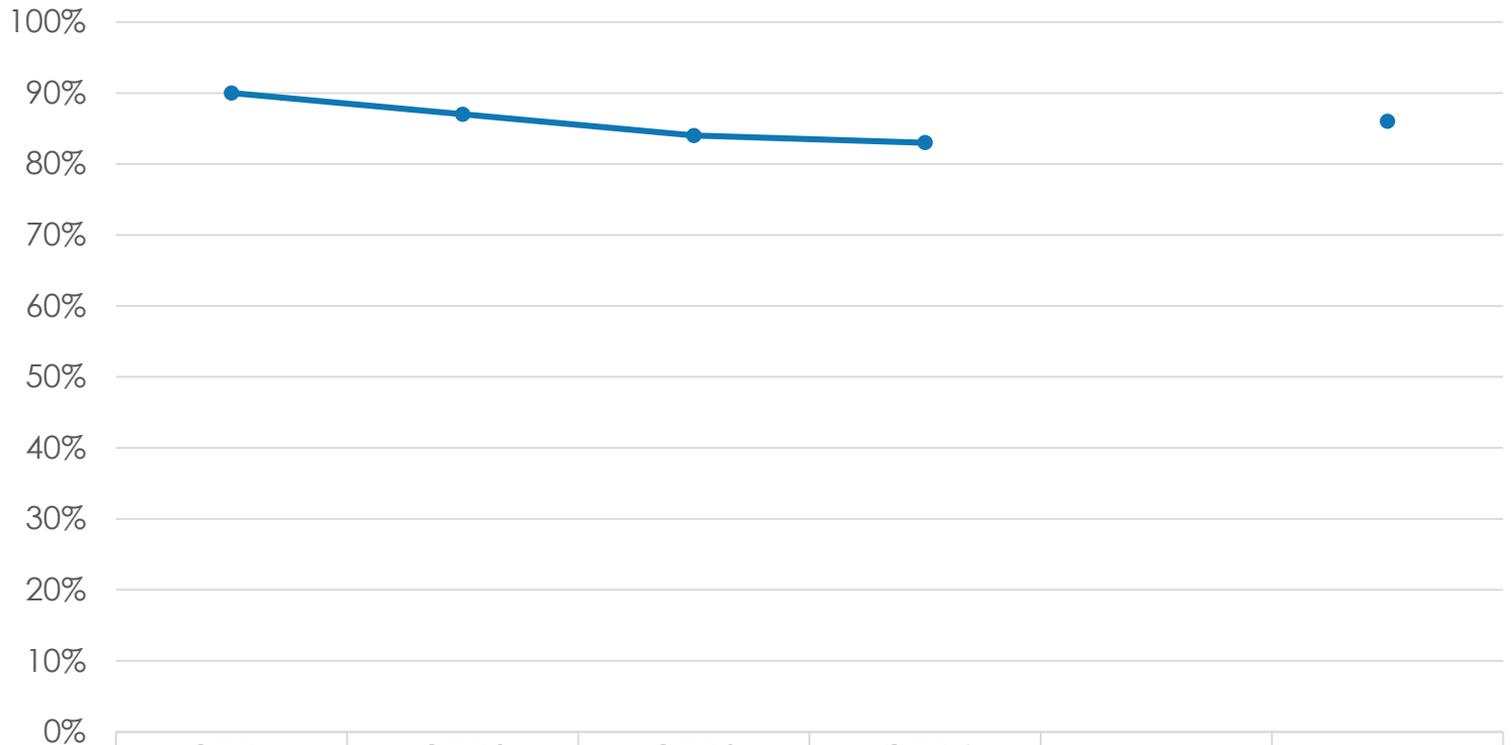


	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
● Online travel agent	49%	49%	48%	52%		49%
● Trvl Agt/ Co- Pkg Tour	37%	31%	35%	29%		33%
● Online 3rd Party	6%	7%	6%	8%		6%
● Direct Air/ Hotel	8%	13%	12%	12%		11%

Prepaid Package Trip

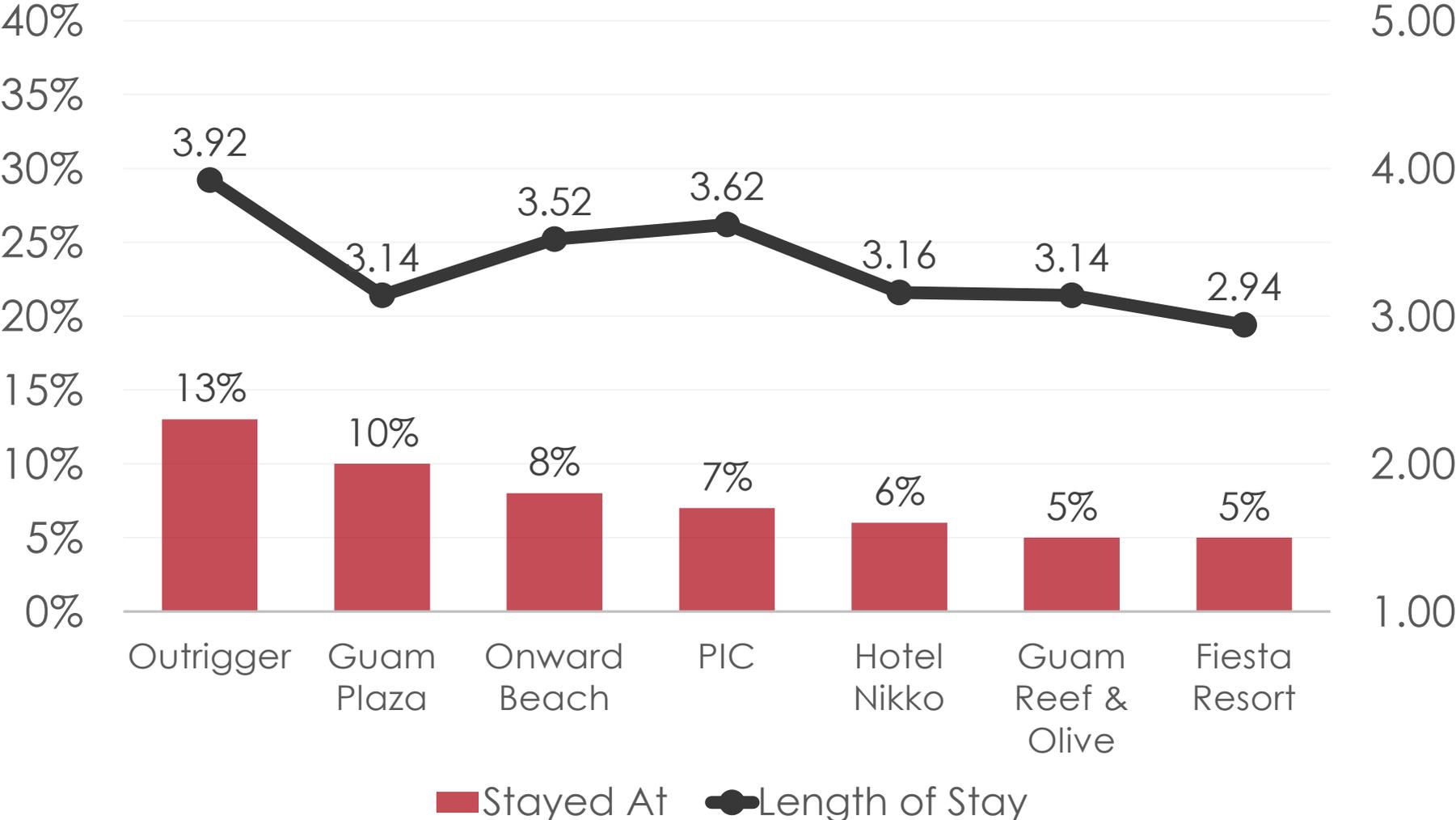


Prepaid Package Trip

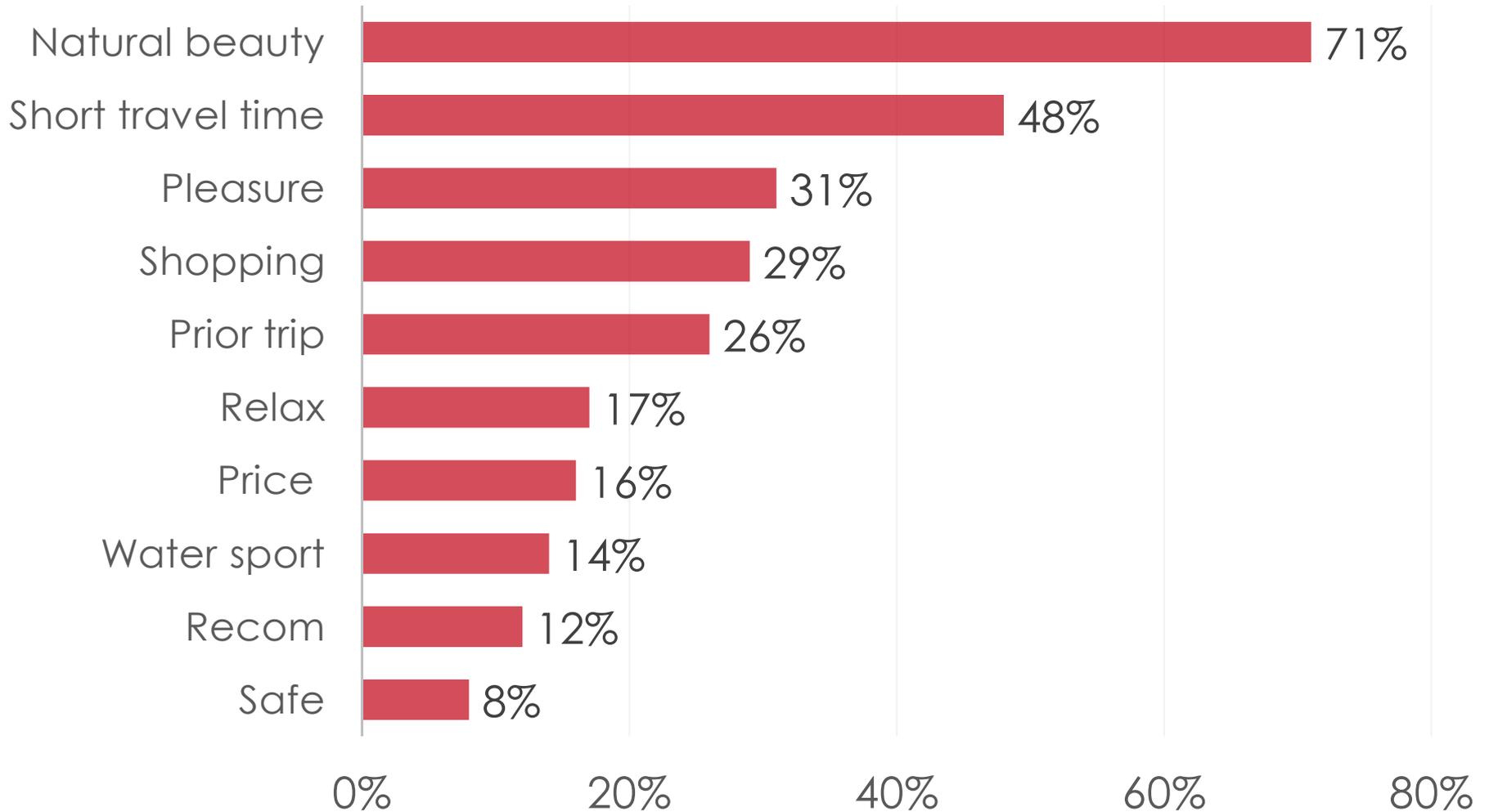


Prepaid Pkg Trip	90%	87%	84%	83%		86%
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Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Key Segments

GVB EXIT SURVEY
Q5A Please select the top three reasons that motivated you to travel to Guam?

	TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
	-	-	-	-	-	-	-	-
Q5A Beautiful seas, beaches, tropical climate	71%	67%	63%	62%	31%	33%	41%	64%
Short travel time (not too far from home)	48%	56%	51%	46%	44%	17%	19%	43%
Pleasure/ vacation	31%	27%	28%	29%	31%		15%	26%
Shopping	29%	22%	24%	37%	38%	33%	19%	25%
A previous visit	26%	32%	53%	29%	31%	33%	15%	31%
Just to relax	17%	15%	15%	16%	19%		7%	15%
Price of the tour package	16%	15%	14%	13%	19%			16%
Water sports (snorkeling, windsurfing, parasailing)	14%	13%	10%	11%			7%	11%
Recommendation of friend/ relative/ travel agency	12%	10%	7%	11%	13%		4%	14%
It is a safe place to spend a vacation	8%	11%	9%	11%				9%
Honeymoon	7%	12%	2%	5%			44%	4%
Scuba diving	3%	2%	3%	3%	13%			3%
Company/ business trip	3%		4%	5%	6%	50%		14%
To Get Married/ attend Wedding	2%	4%	2%	3%	13%		100%	2%
To visit friends or relatives	2%	2%	2%	3%				2%
To golf	1%	1%	2%	2%	6%			3%
My company sponsored me	1%	0%	1%	2%		33%		3%
Organized sporting activity/ event	1%	0%	1%	1%			4%	1%
Incentive trip	0%	0%	1%	3%		83%		1%
Shop Guam E-Fest	0%	1%	1%		6%			1%
Career certification/ testing	0%	0%	1%					
Adventure	0%	0%	0%					1%
Convention/ conference/ trade show/ meeting	0%		0%			17%		0%
Government or military	0%		0%					
School trip	0%							
Total	1090	619	540	168	16	6	27	214

SECTION 3

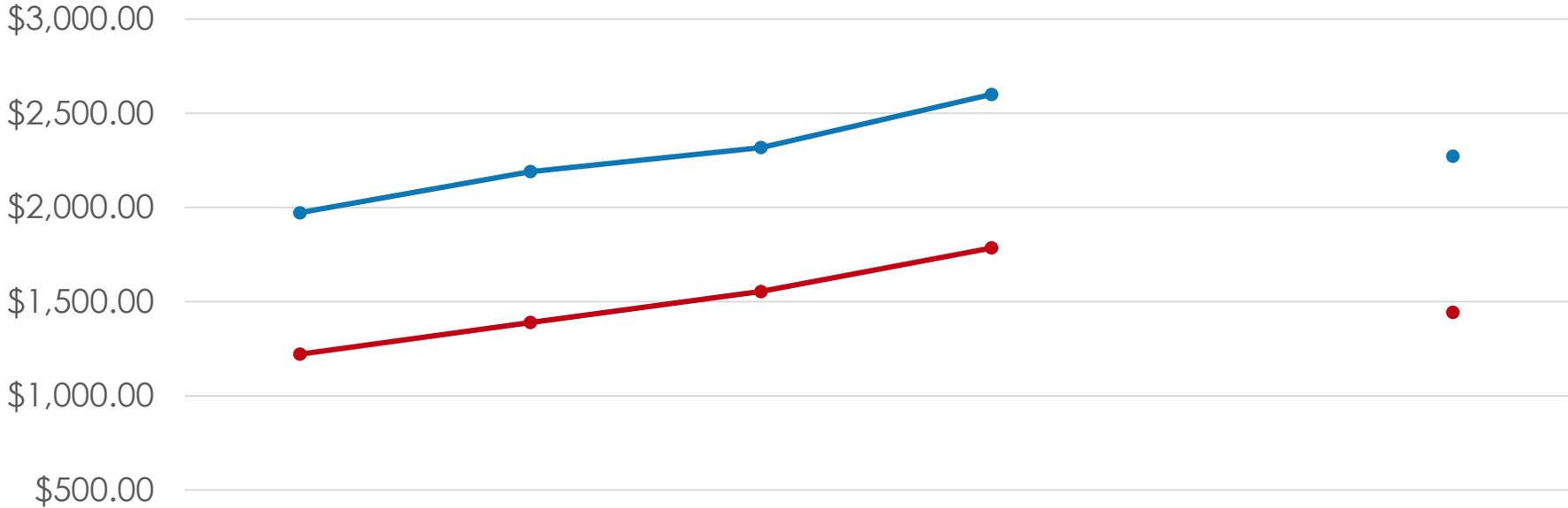
EXPENDITURES

Prepaid Expenditures

- \$2,600.66 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,062.02 = overall mean average per person prepaid expenditures

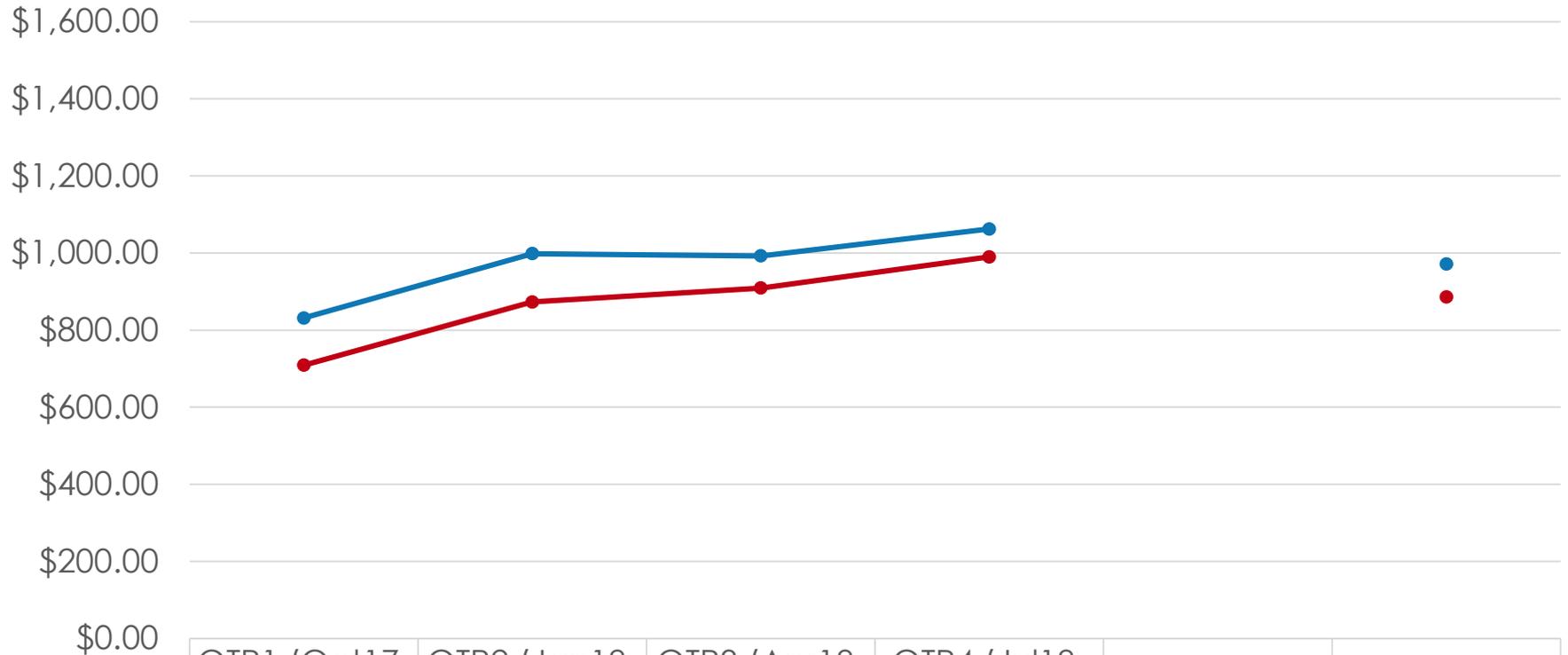
Prepaid Entire Travel Party – FY2018

Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)		YTD
● MEAN	\$1,972.63	\$2,190.35	\$2,318.30	\$2,600.66		\$2,272.20
● MEDIAN	\$1,222.00	\$1,390.00	\$1,554.00	\$1,786.00		\$1,444.00

Prepaid Per Person– FY2018 Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)	YTD
MEAN	\$831.21	\$998.22	\$992.21	\$1,062.02	\$971.25
MEDIAN	\$709.00	\$873.00	\$909.00	\$990.00	\$886.00

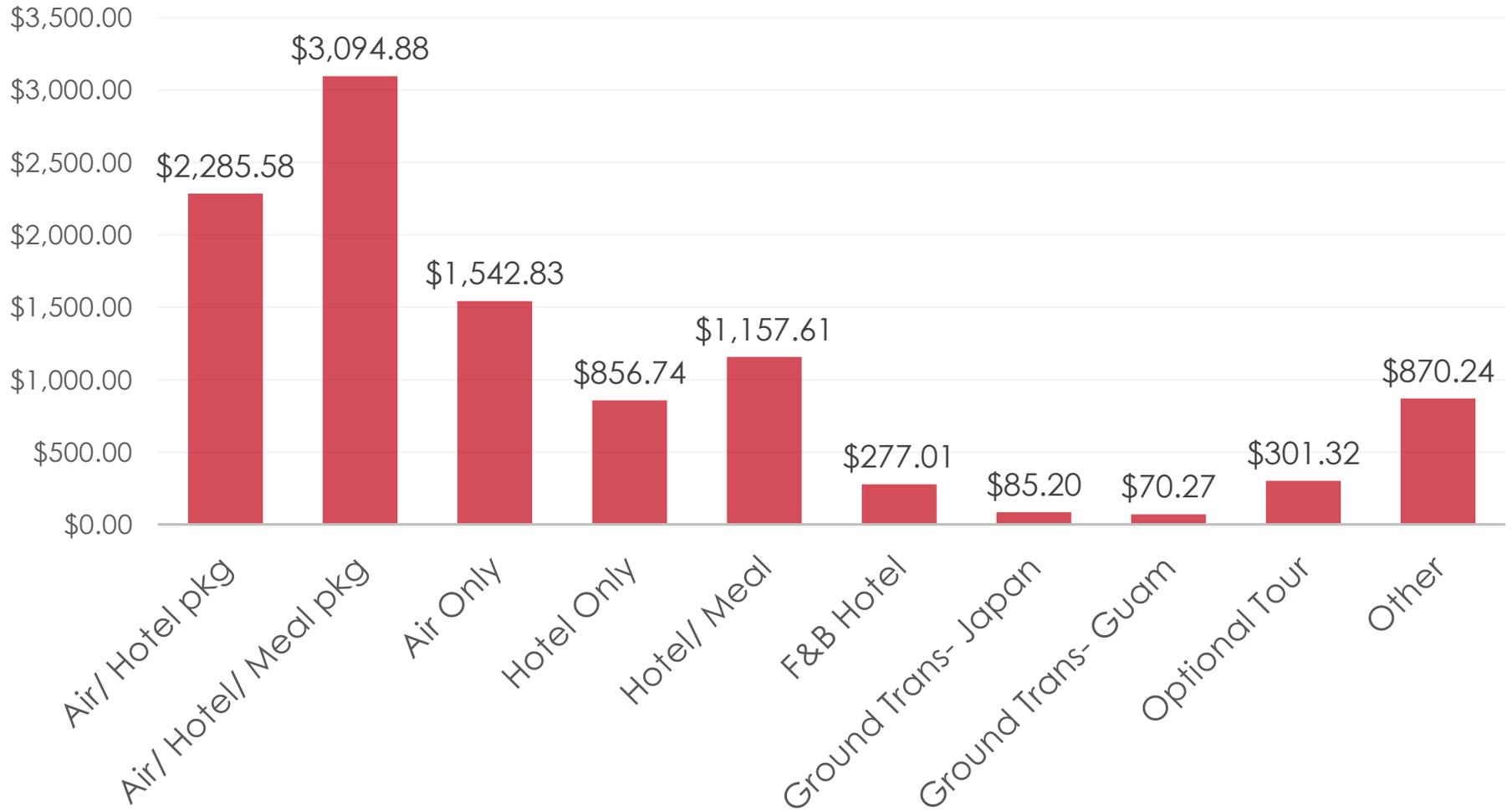
Prepaid Per Person– Key Segments

**GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:**

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
PREPAID PP	Mean	\$1,062.02	\$1,201.36	\$1,045.08	\$1,048.38	\$780.93	\$124.85	\$1,504.65	\$947.75
	Median	\$990	\$1,126	\$986	\$1,000	\$626	\$0	\$1,183	\$895

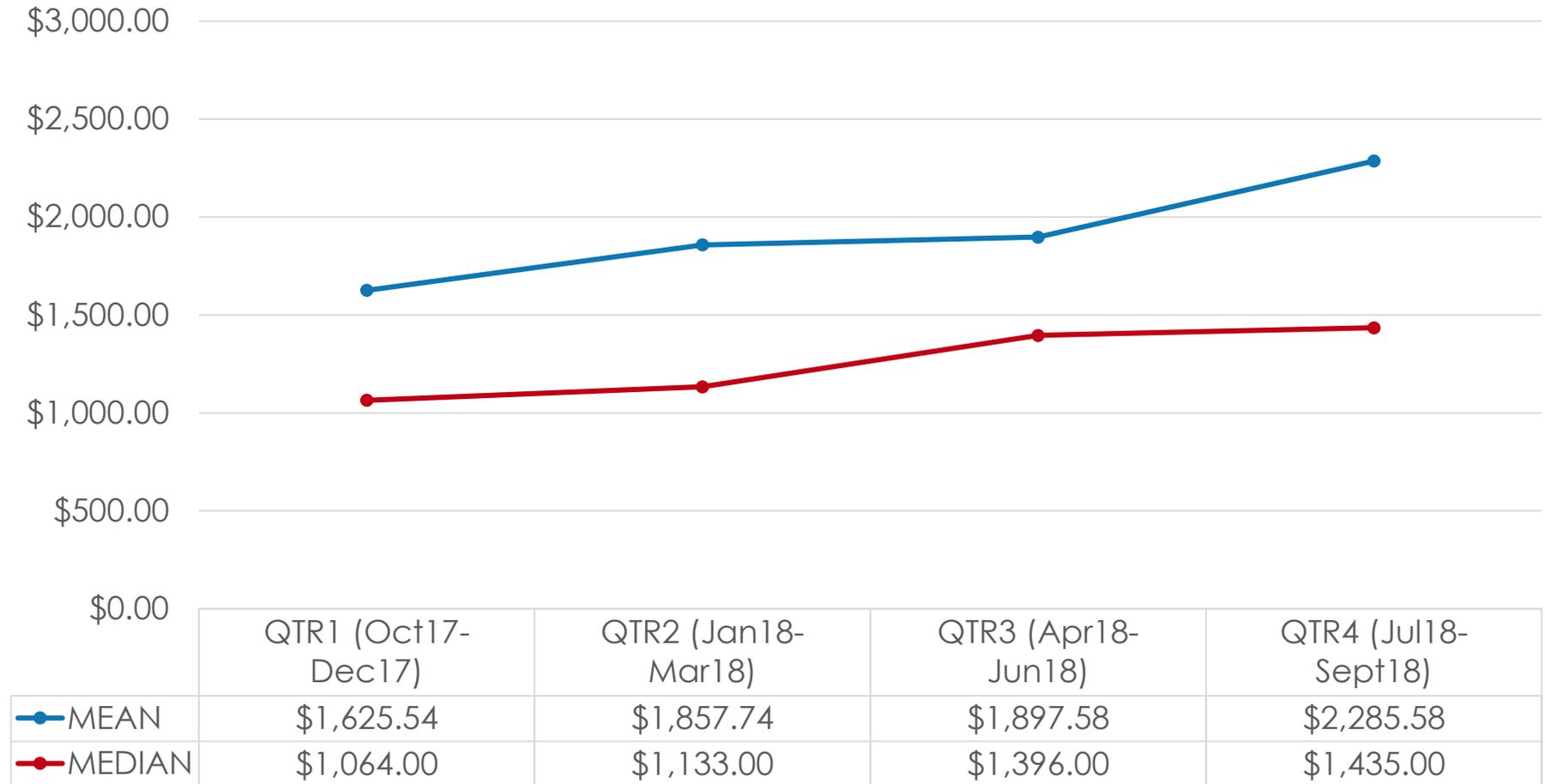
Prepared by Anthology Research

Prepaid Expenses by Category – MEAN Entire Travel Party



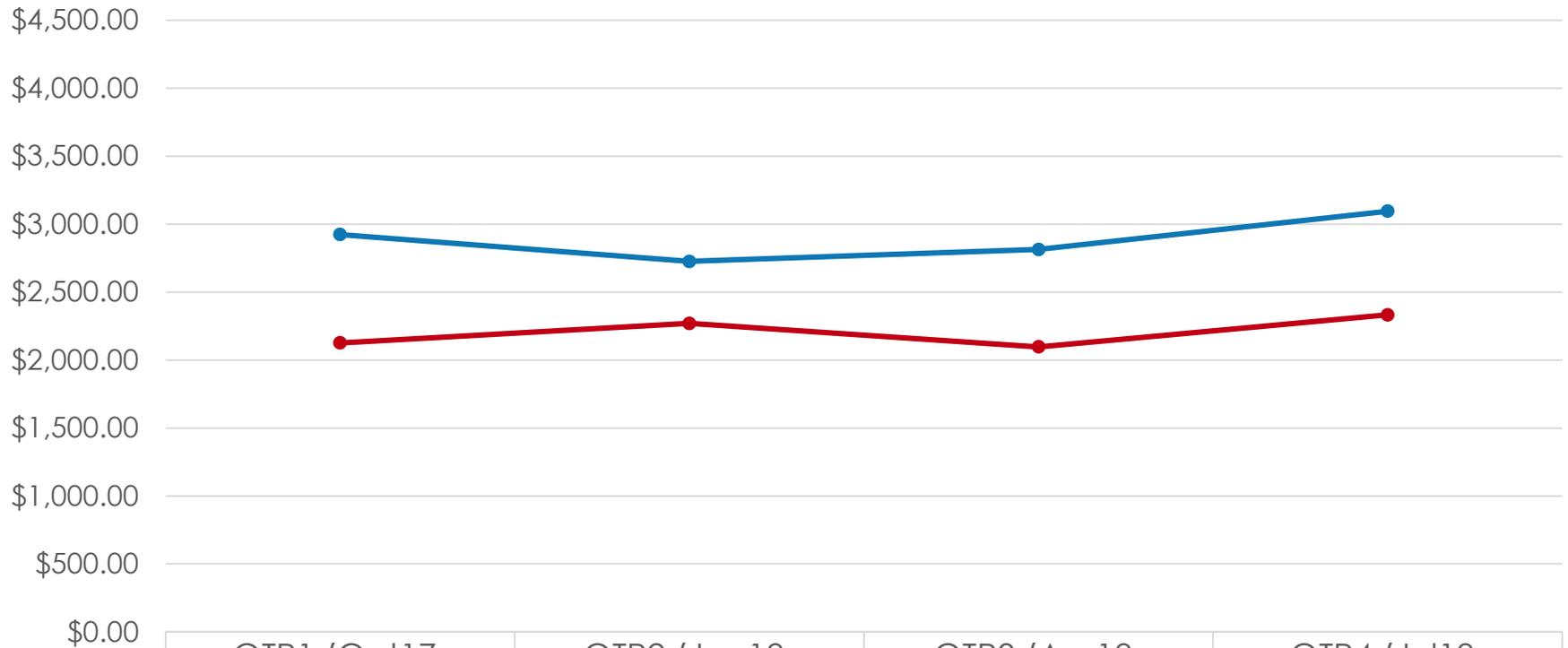
Prepaid– FY2018 Tracking

Airfare & Accommodation Packages



Prepaid- FY2018 Tracking

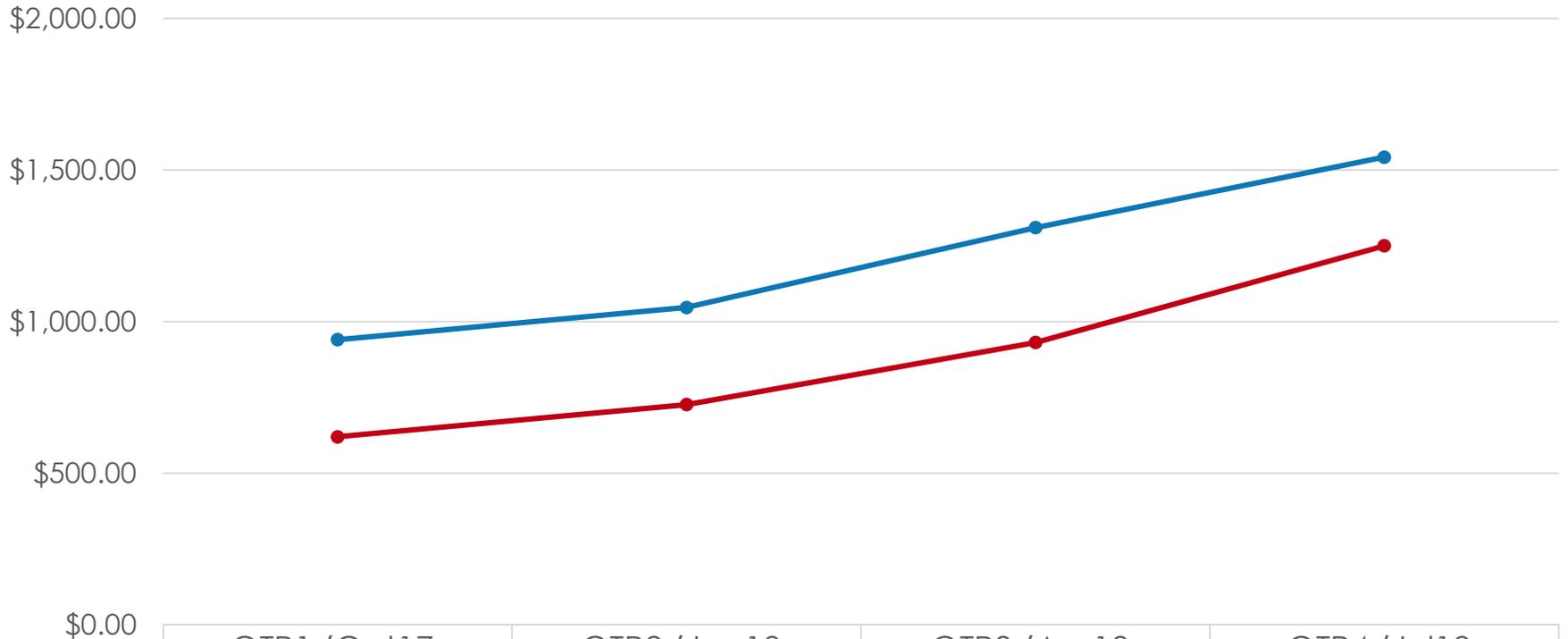
Airfare & Accommodation W/ Meal Packages



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
MEAN	\$2,923.31	\$2,725.81	\$2,814.24	\$3,094.88
MEDIAN	\$2,126.00	\$2,270.00	\$2,097.00	\$2,332.00

Prepaid– FY2018 Tracking

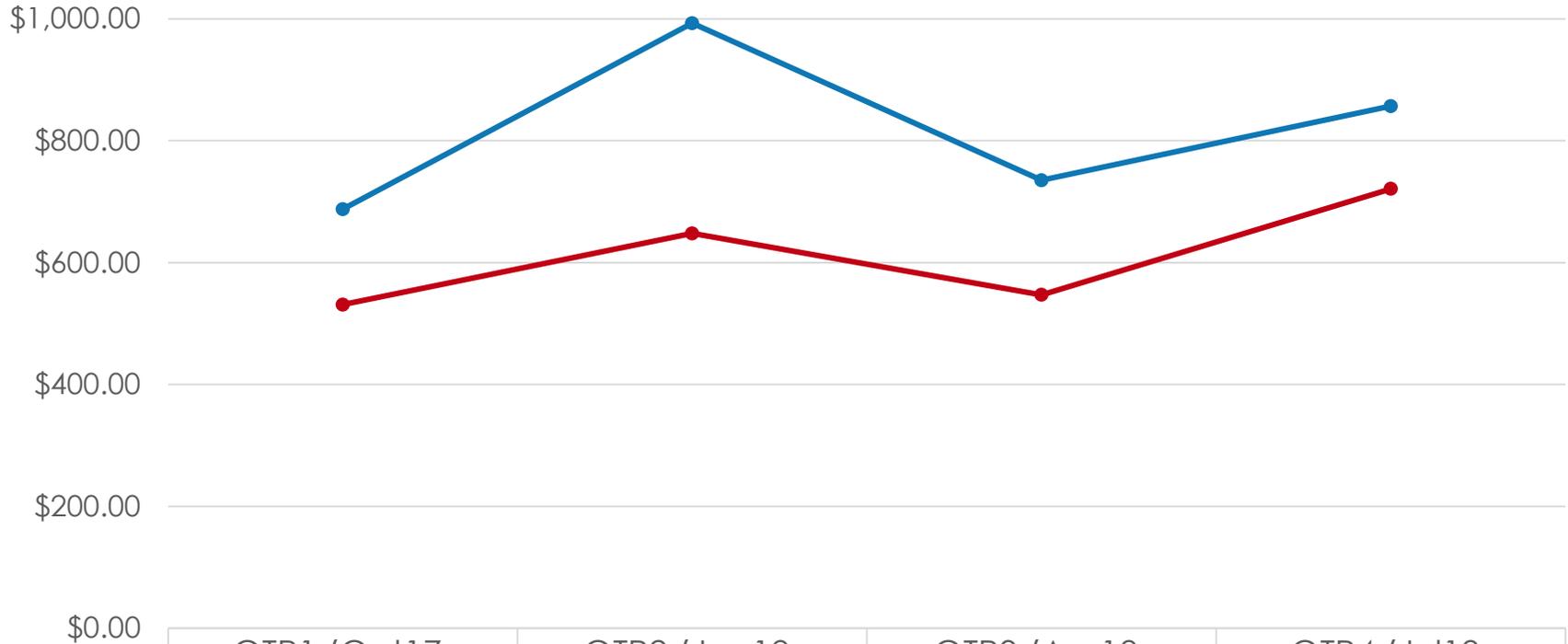
Airfare Only



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
● MEAN	\$940.59	\$1,046.57	\$1,310.24	\$1,542.83
● MEDIAN	\$620.00	\$726.00	\$931.00	\$1,250.00

Prepaid- FY2018 Tracking

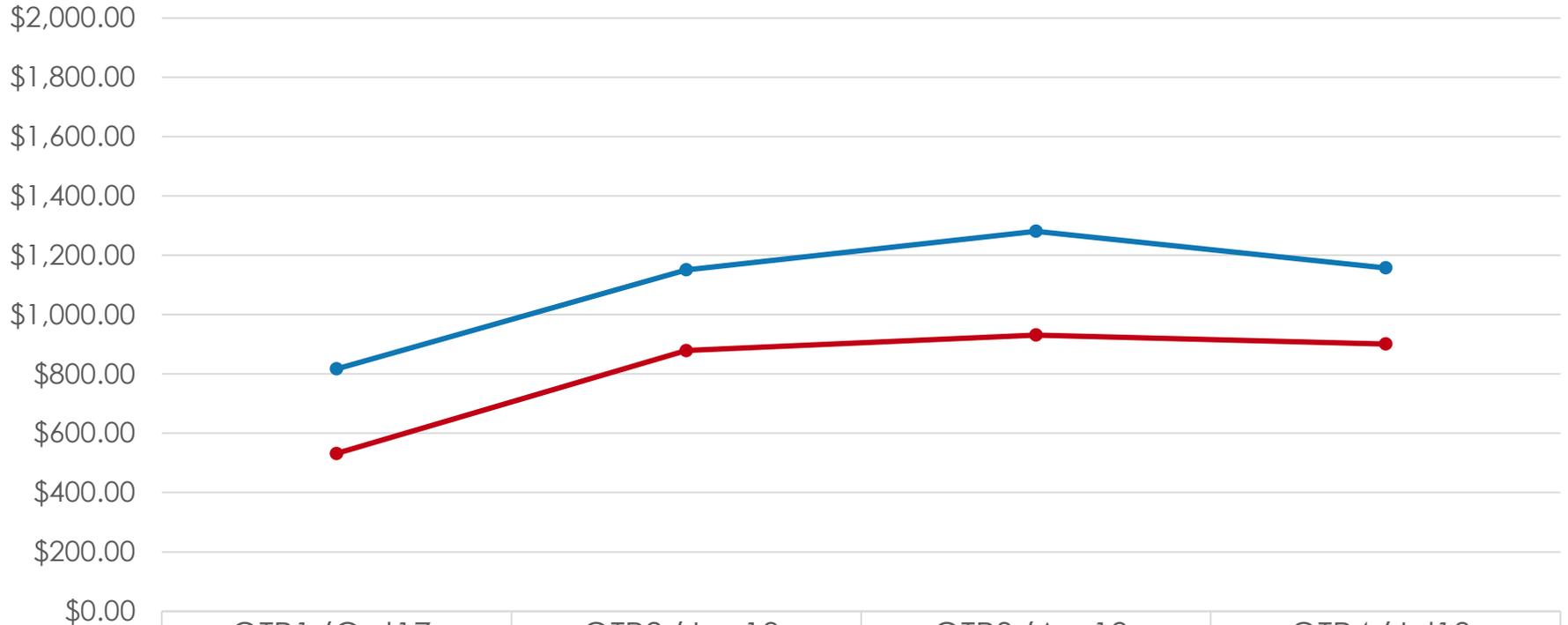
Accommodations Only



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
MEAN	\$687.64	\$992.75	\$734.98	\$856.74
MEDIAN	\$531.00	\$648.00	\$547.00	\$721.00

Prepaid- FY2018 Tracking

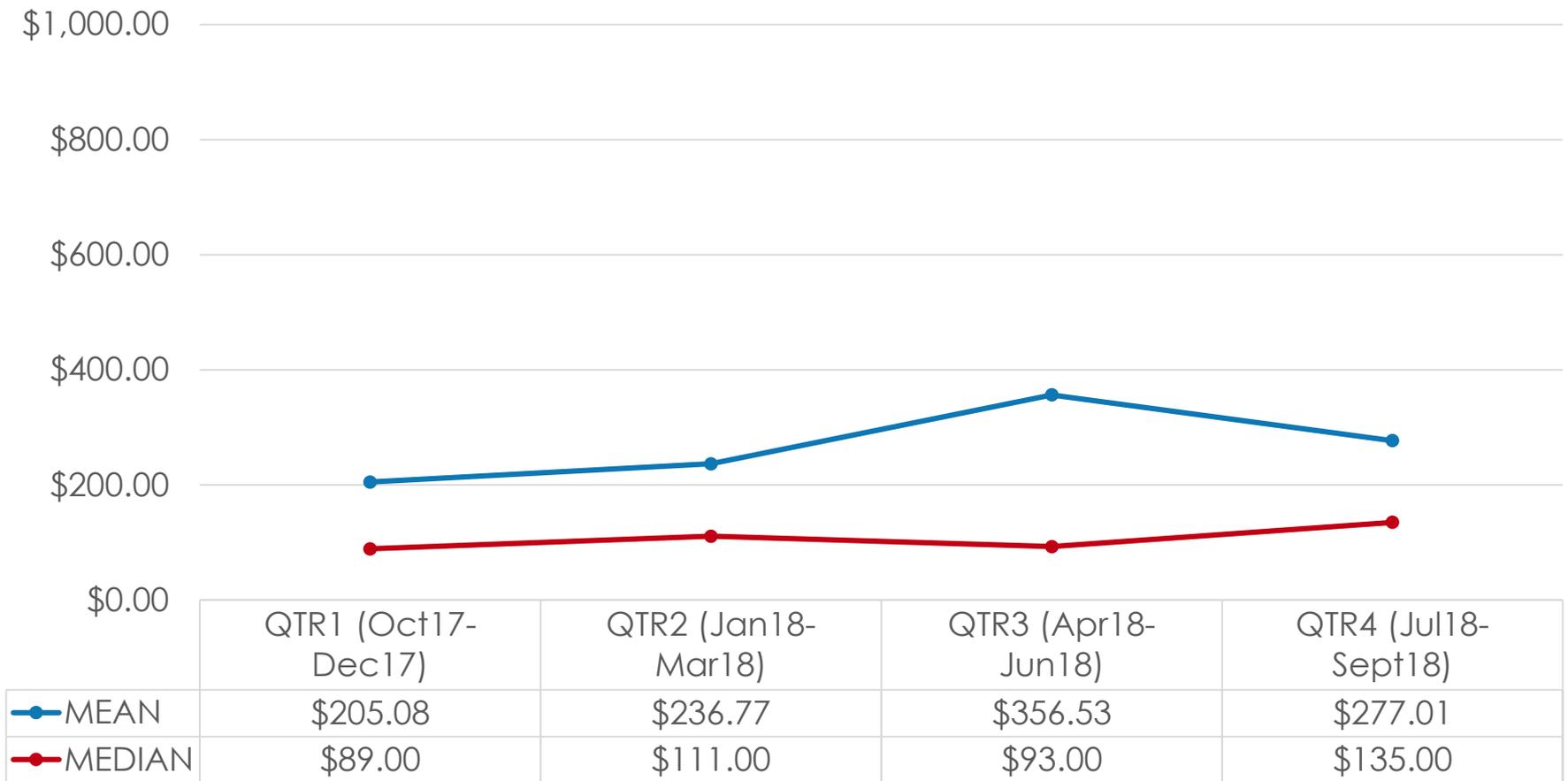
Accommodations w/ Meal Only



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
MEAN	\$816.95	\$1,150.68	\$1,280.92	\$1,157.61
MEDIAN	\$532.00	\$879.00	\$931.00	\$901.00

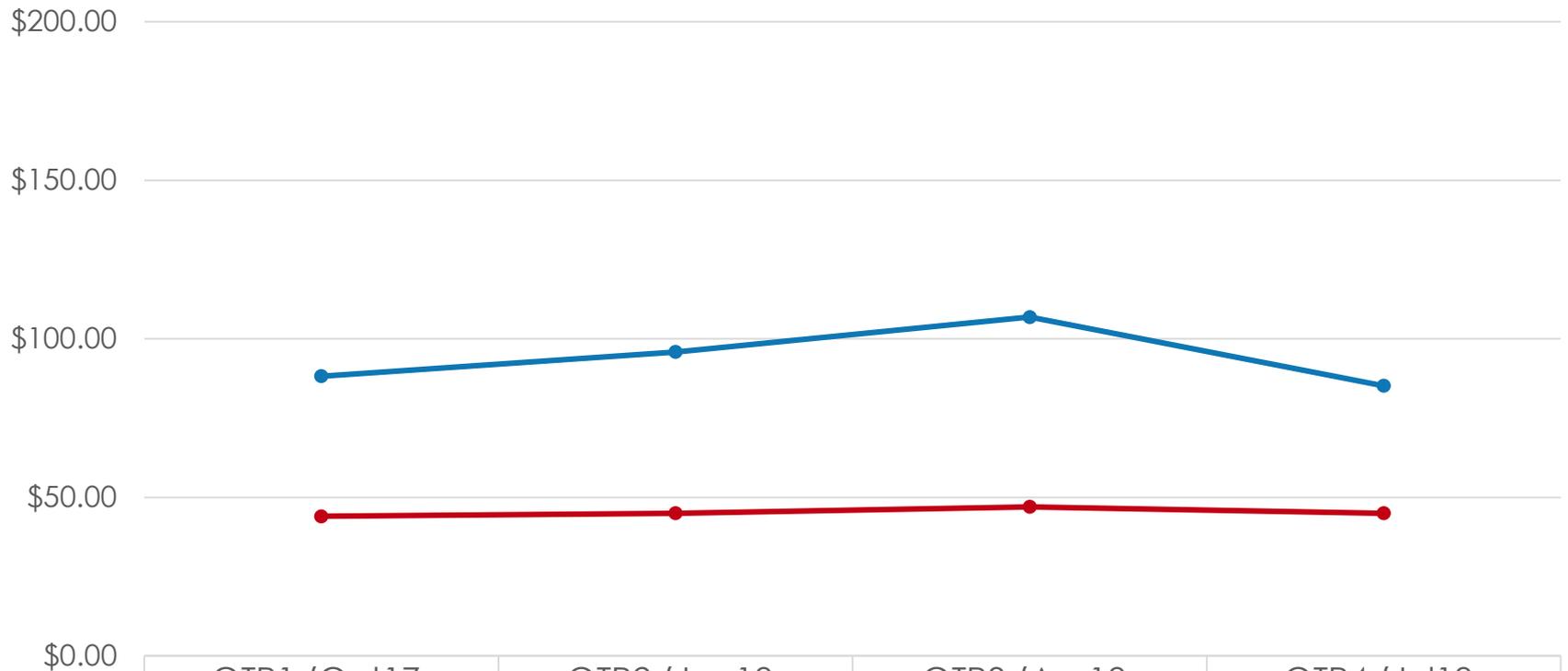
Prepaid- FY2018 Tracking

Food & Beverage in Hotel



Prepaid- FY2018 Tracking

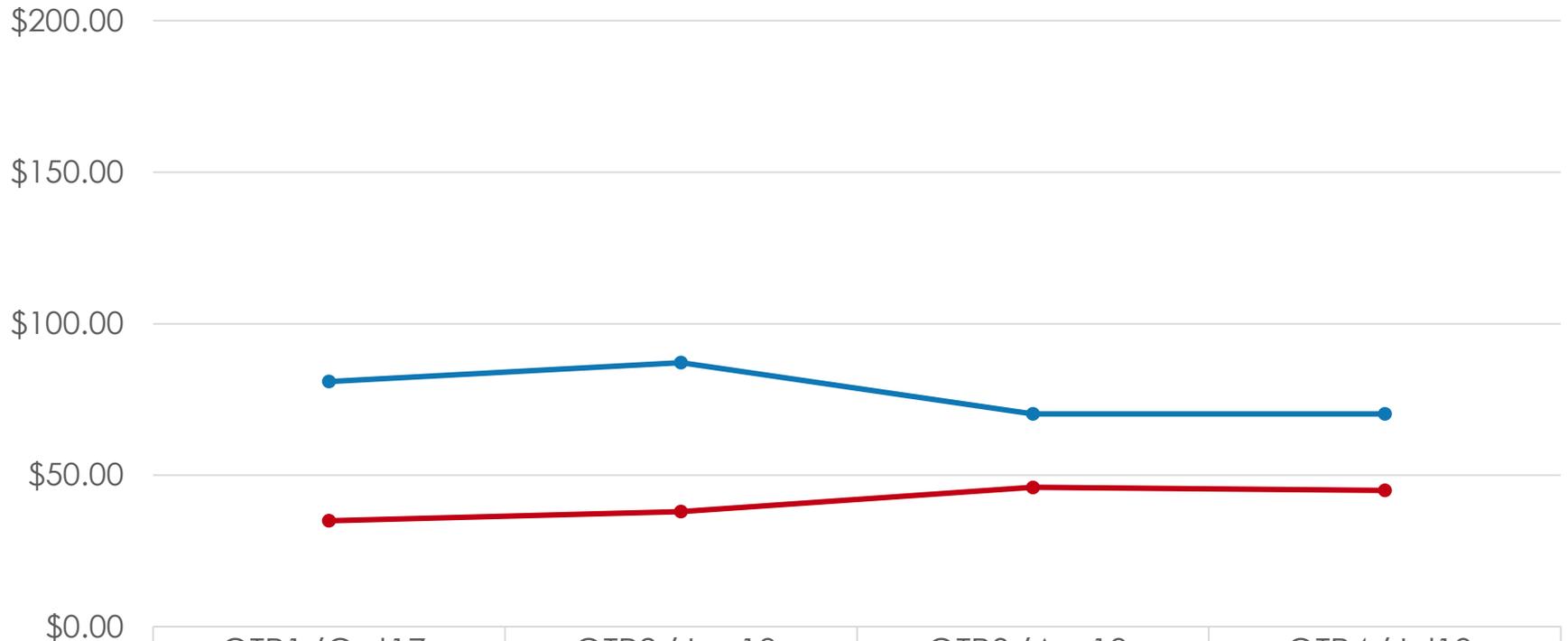
Ground Transportation - Japan



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
● MEAN	\$88.20	\$95.87	\$106.83	\$85.20
● MEDIAN	\$44.00	\$45.00	\$47.00	\$45.00

Prepaid- FY2018 Tracking

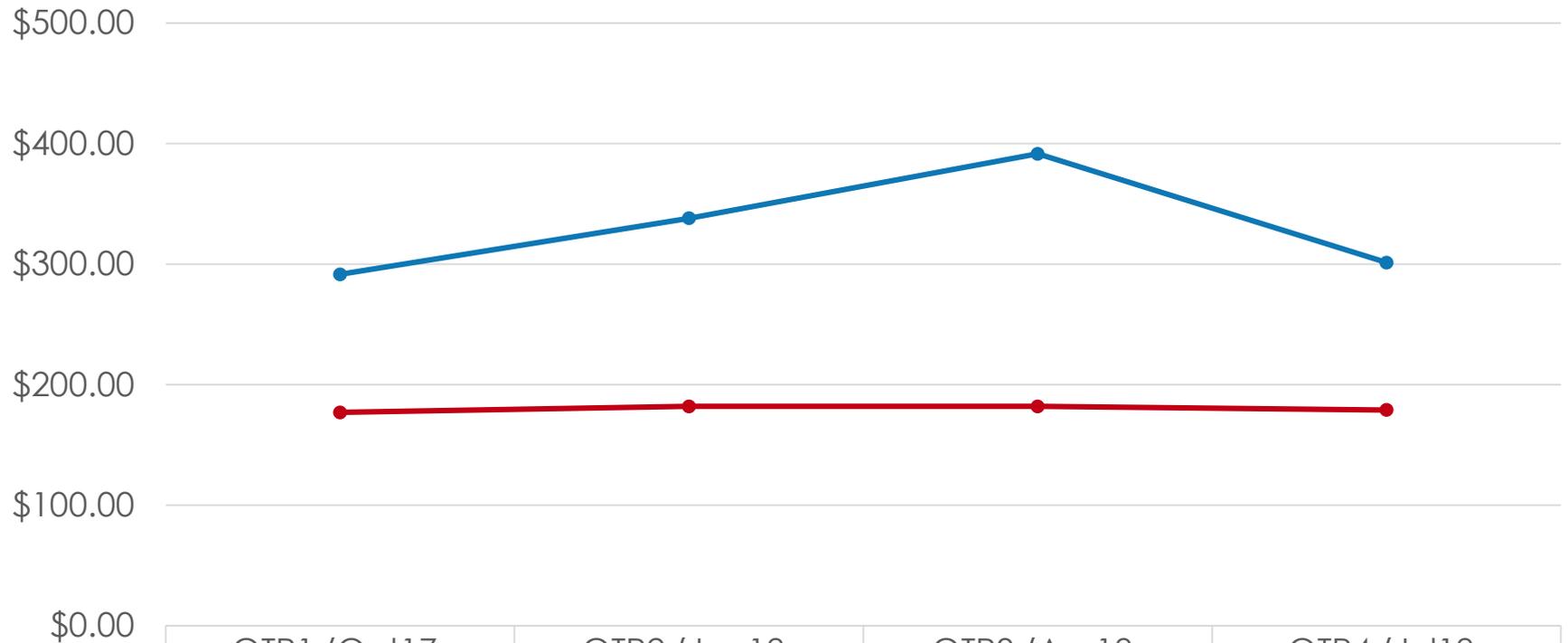
Ground Transportation - Guam



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
MEAN	\$80.94	\$87.20	\$70.24	\$70.27
MEDIAN	\$35.00	\$38.00	\$46.00	\$45.00

Prepaid– FY2018 Tracking

Optional tours/ Activities

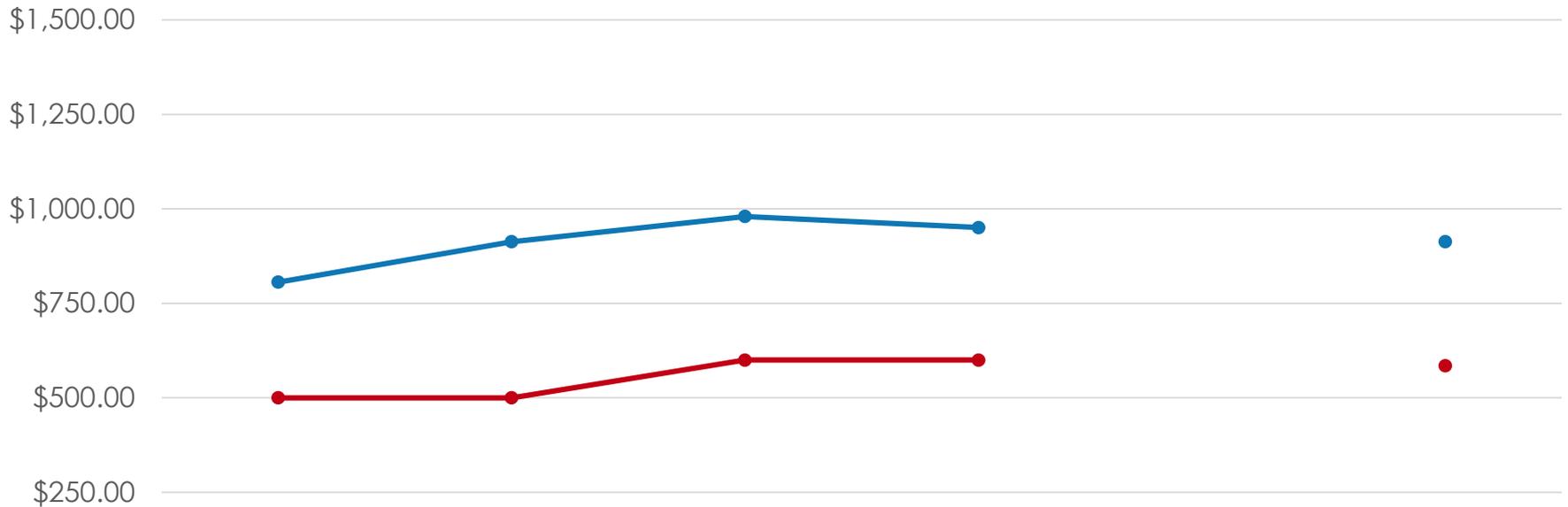


	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
MEAN	\$291.50	\$338.09	\$391.47	\$301.32
MEDIAN	\$177.00	\$182.00	\$182.00	\$179.00

On-Island Expenditures

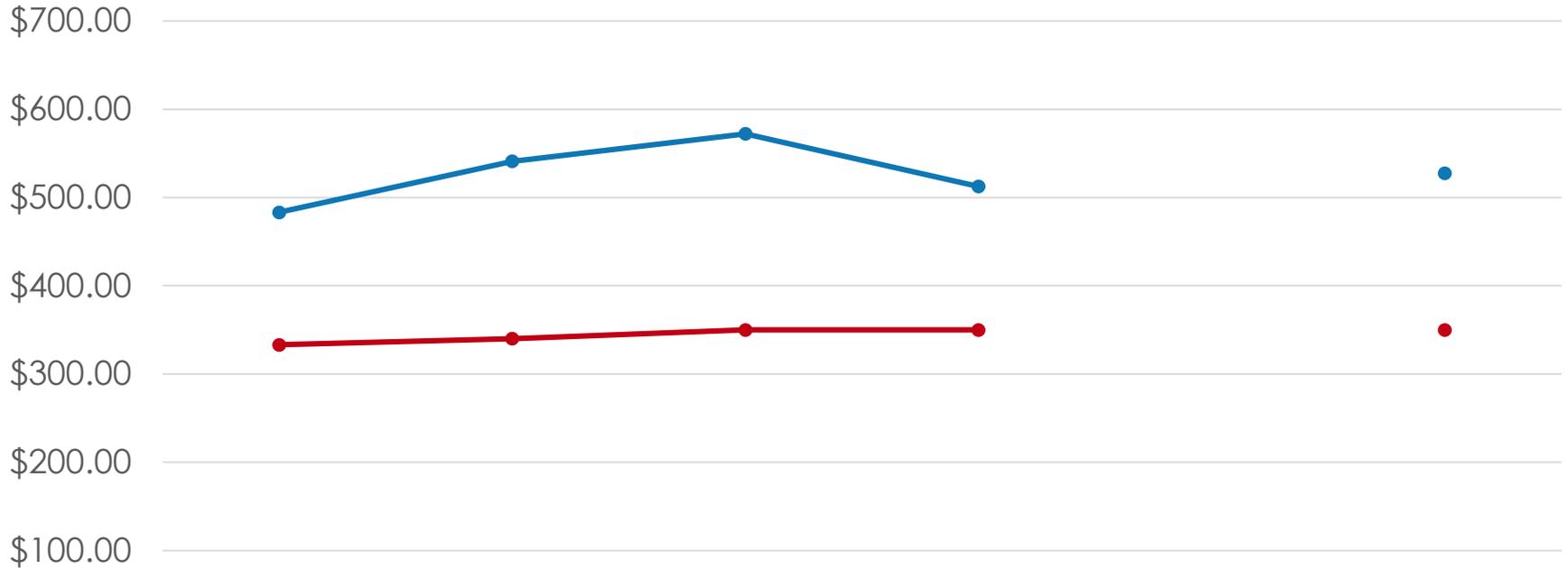
- \$950.46 = overall mean average on-island expense (for entire travel party size) by respondent
- \$512.52 = overall mean average per person on-island expenditures

On-Island Entire Travel Party – FY2018 Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)	YTD
MEAN	\$806.03	\$913.28	\$980.09	\$950.46	\$913.06
MEDIAN	\$500.00	\$500.00	\$600.00	\$600.00	\$585.00

On-Island Per Person – FY2018 Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)		YTD
● MEAN	\$483.22	\$541.06	\$572.24	\$512.52		\$527.47
● MEDIAN	\$333.00	\$340.00	\$350.00	\$350.00		\$350.00

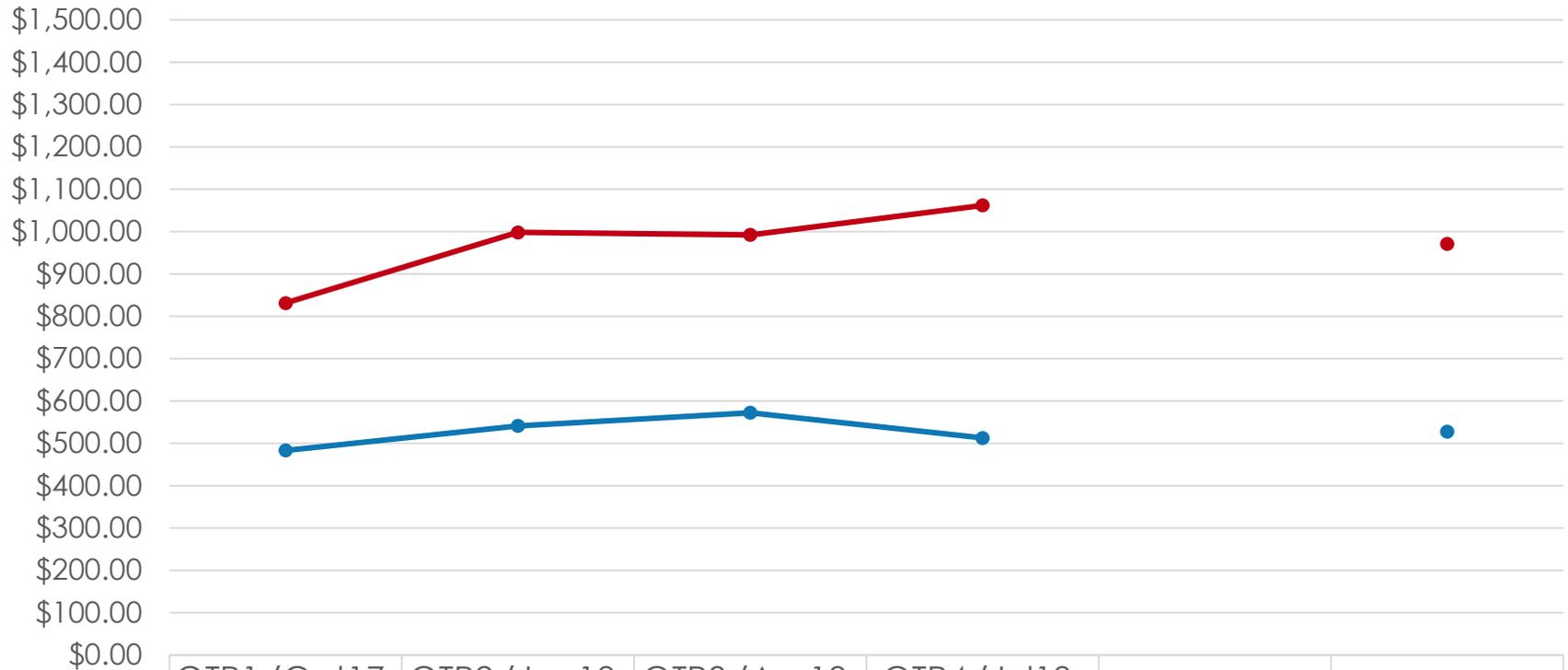
On-Island Per Person – Key Segments

**GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO**

	TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
	-	-	-	-	-	-	-	-
ONISLE PER PERSON Mean	\$512.52	\$489.62	\$543.19	\$609.55	\$612.19	\$567.17	\$704.56	\$531.07
Median	\$350	\$314	\$364	\$438	\$500	\$538	\$375	\$333

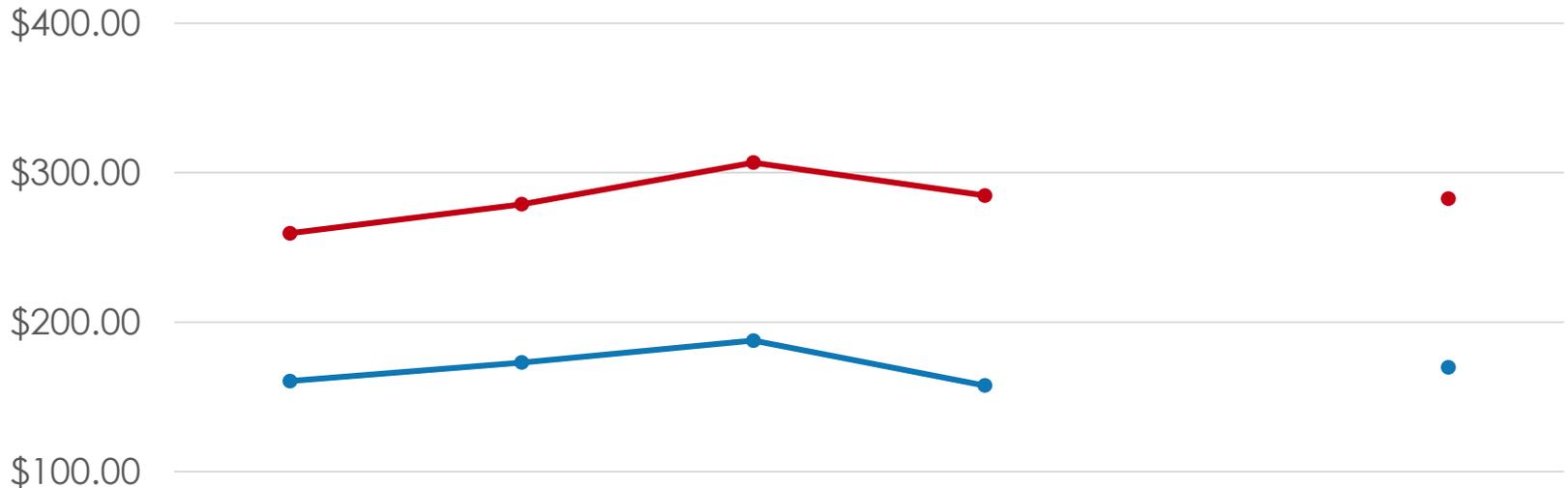
Prepared by Anthology Research

Per Person MEAN expenditures – FY2018 Tracking On-Island/ Prepaid



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)		YTD
● On-Island	\$483.22	\$541.06	\$572.24	\$512.52		\$527.47
● Prepaid	\$831.21	\$998.22	\$992.21	\$1,062.02		\$971.25

On-Island Per Day Spending – FY2018 Tracking MEAN



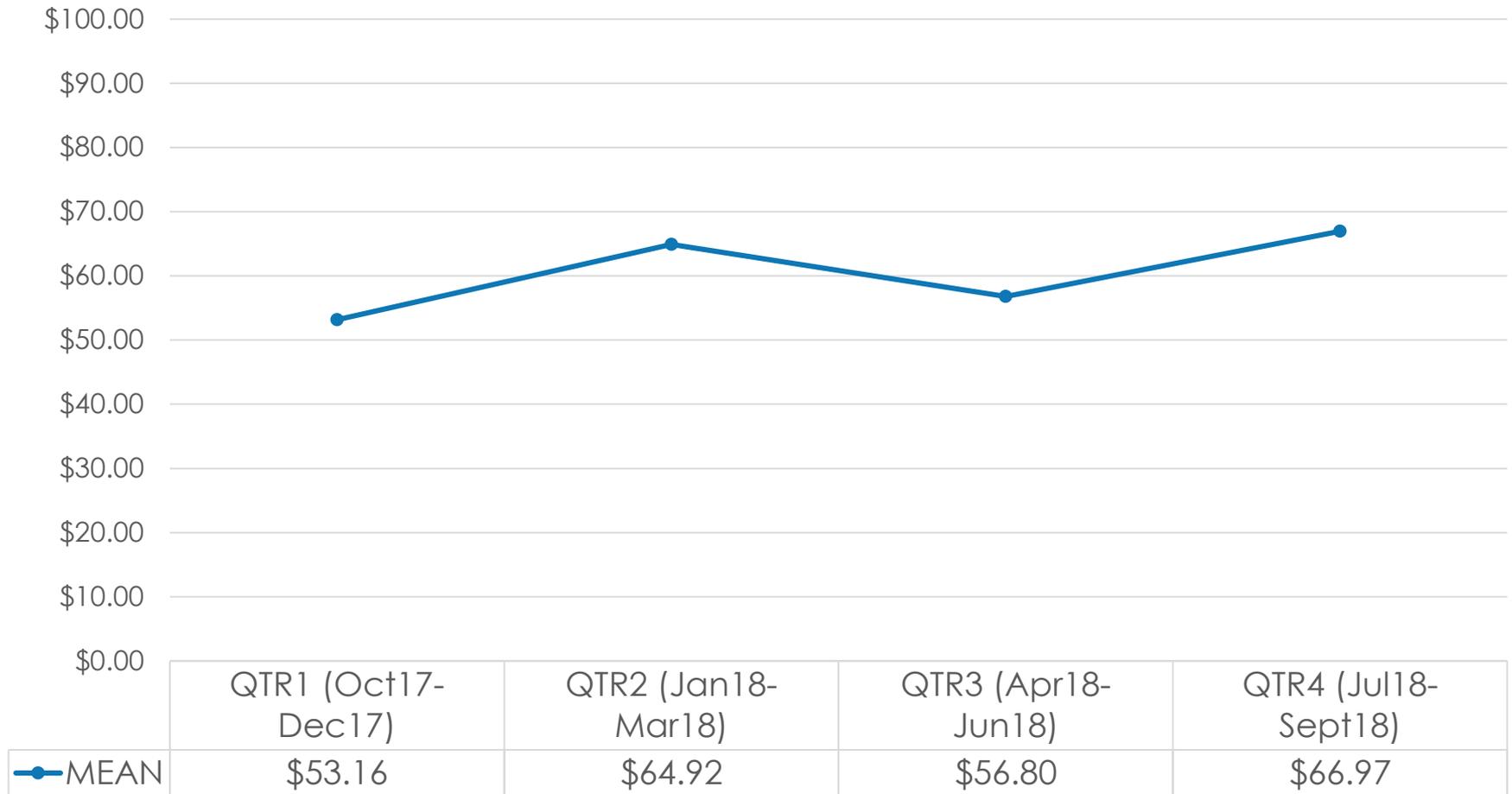
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)	YTD
Per Person	\$160.69	\$173.06	\$187.74	\$157.68	\$169.87
Travel Party	\$259.55	\$278.96	\$306.81	\$284.71	\$282.71

On-Island Expenses by Category – MEAN Entire Travel Party



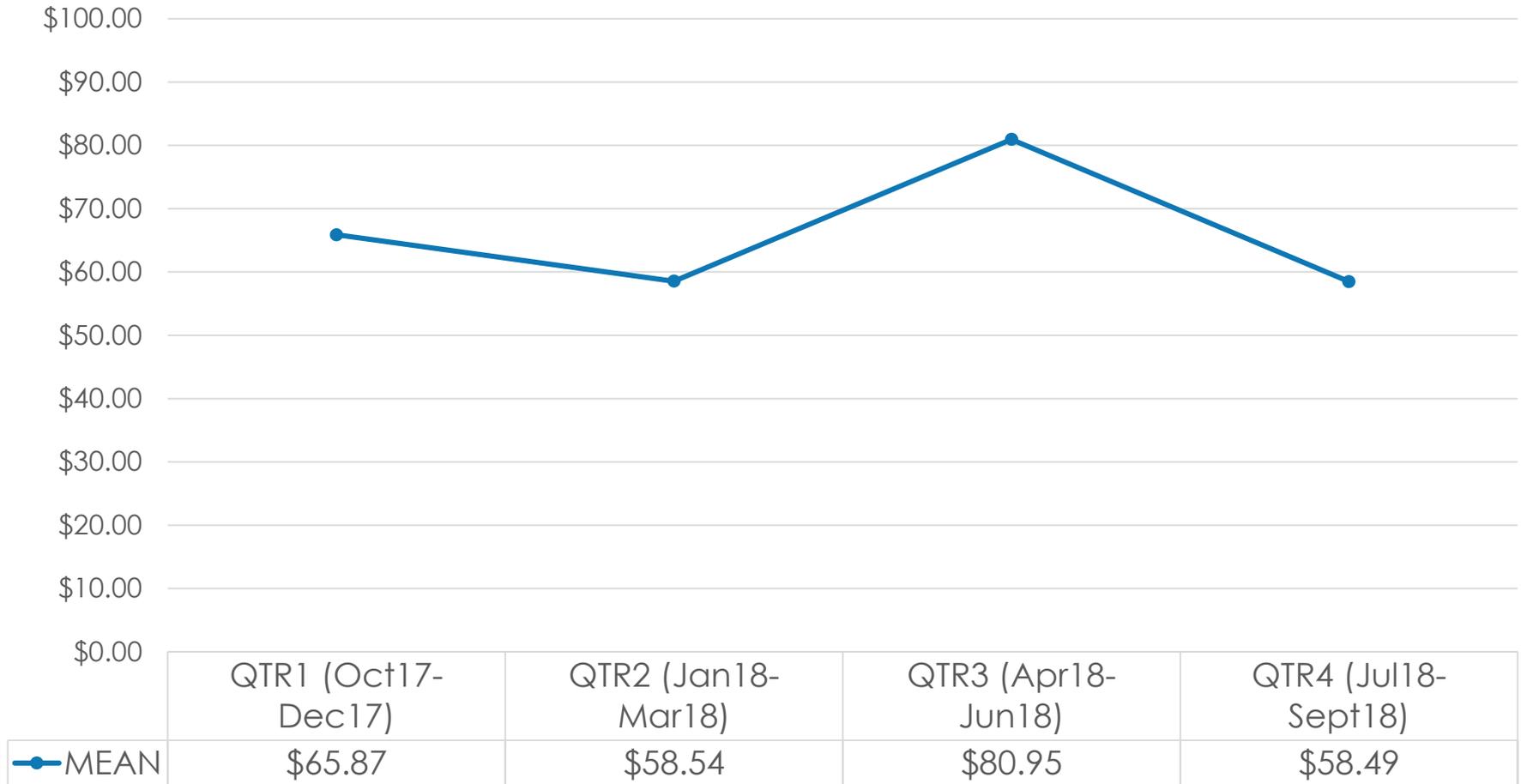
On-Island – FY2018 Tracking

Food & Beverage - Hotel



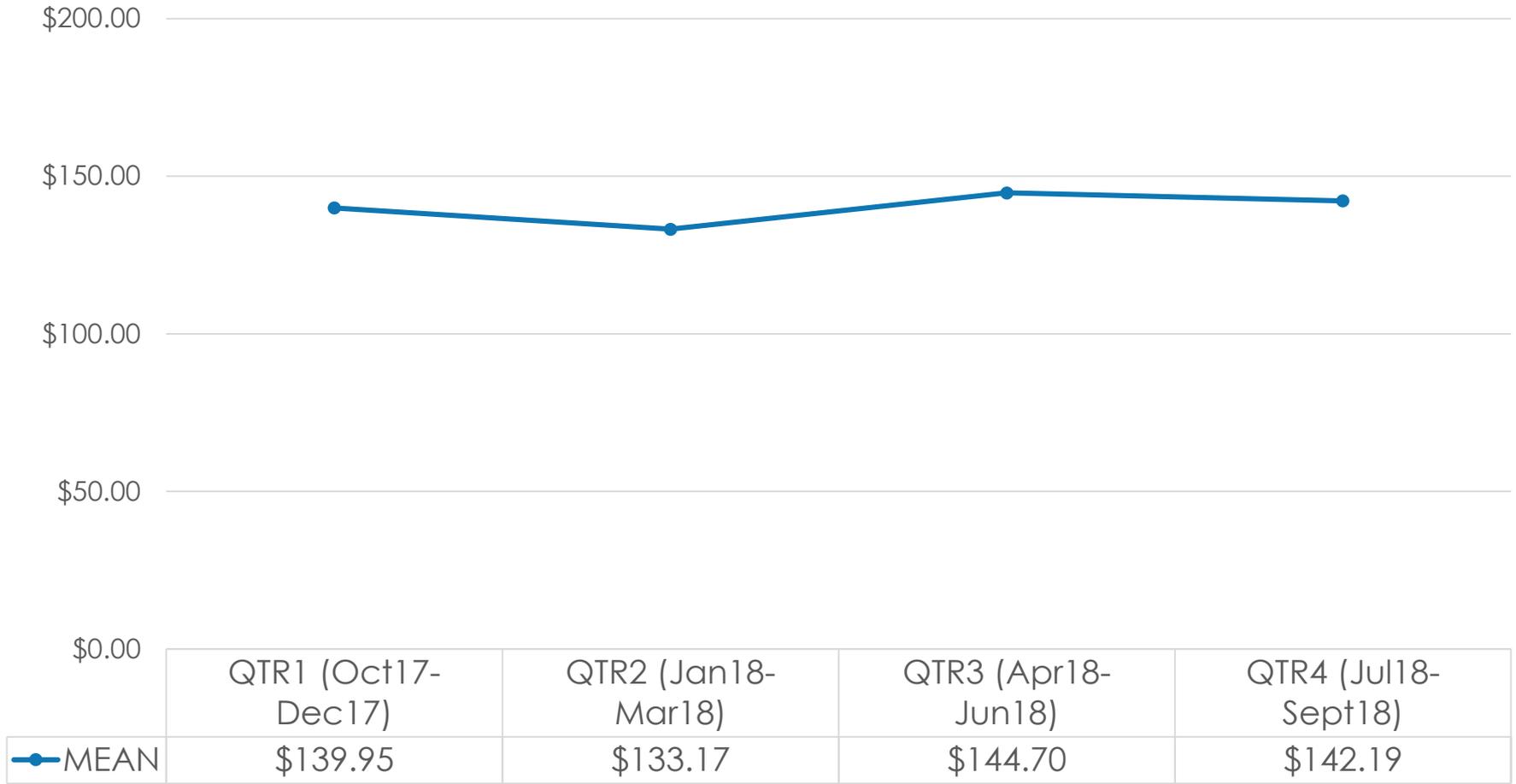
On-Island – FY2018 Tracking

Food & Beverage – Fast Food/ Convenience Store



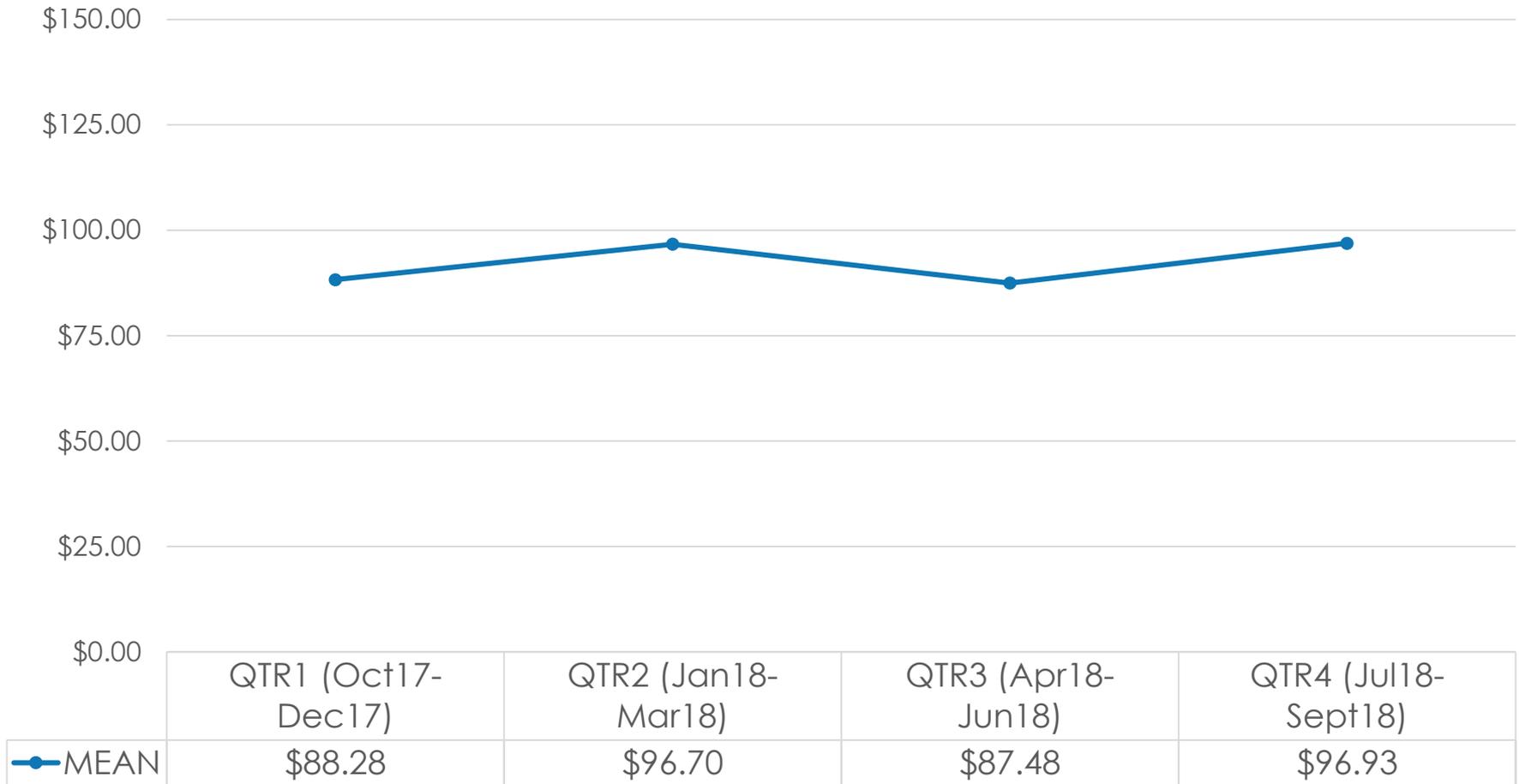
On-Island – FY2018 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



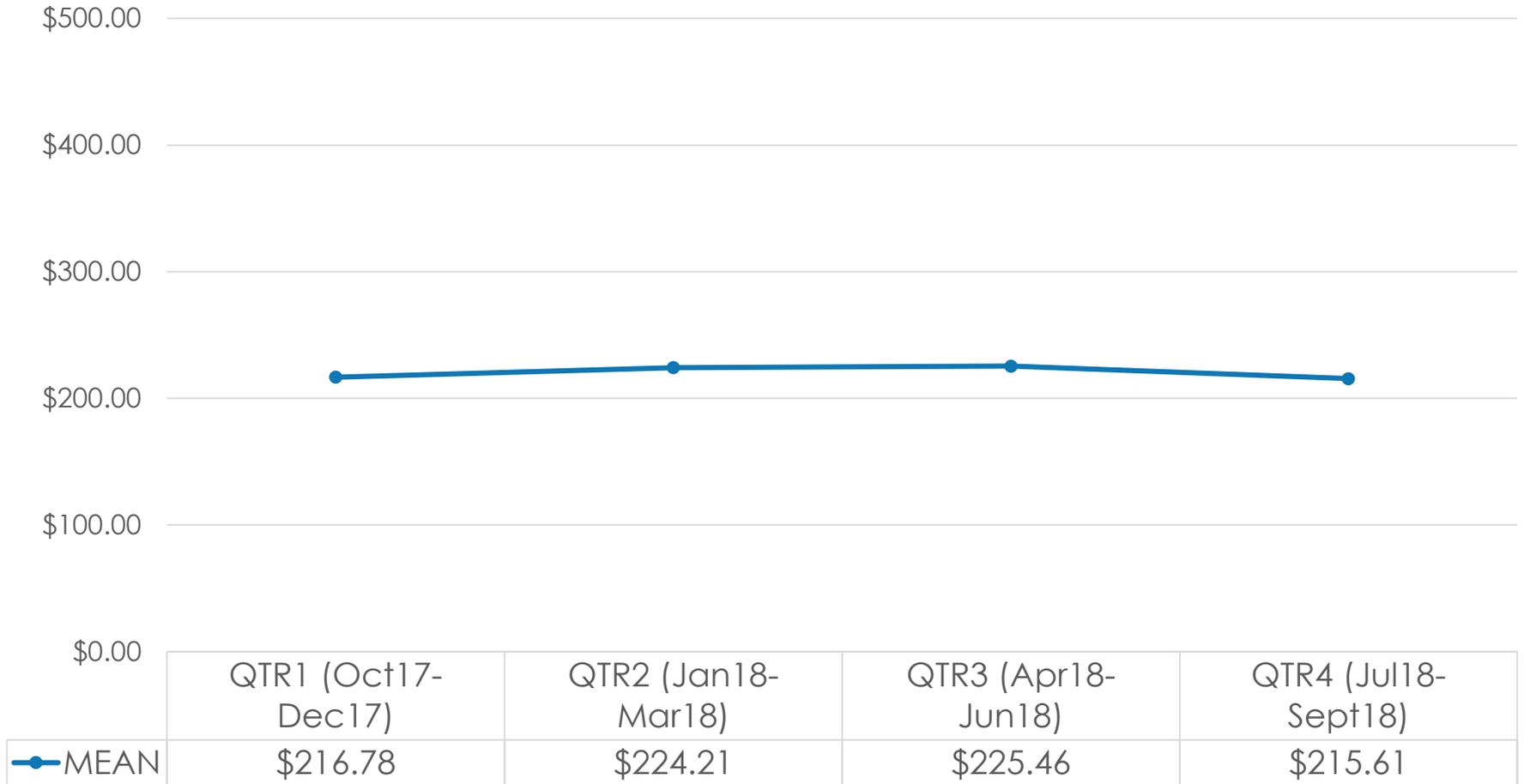
On-Island – FY2018 Tracking

Optional tour/ Activities



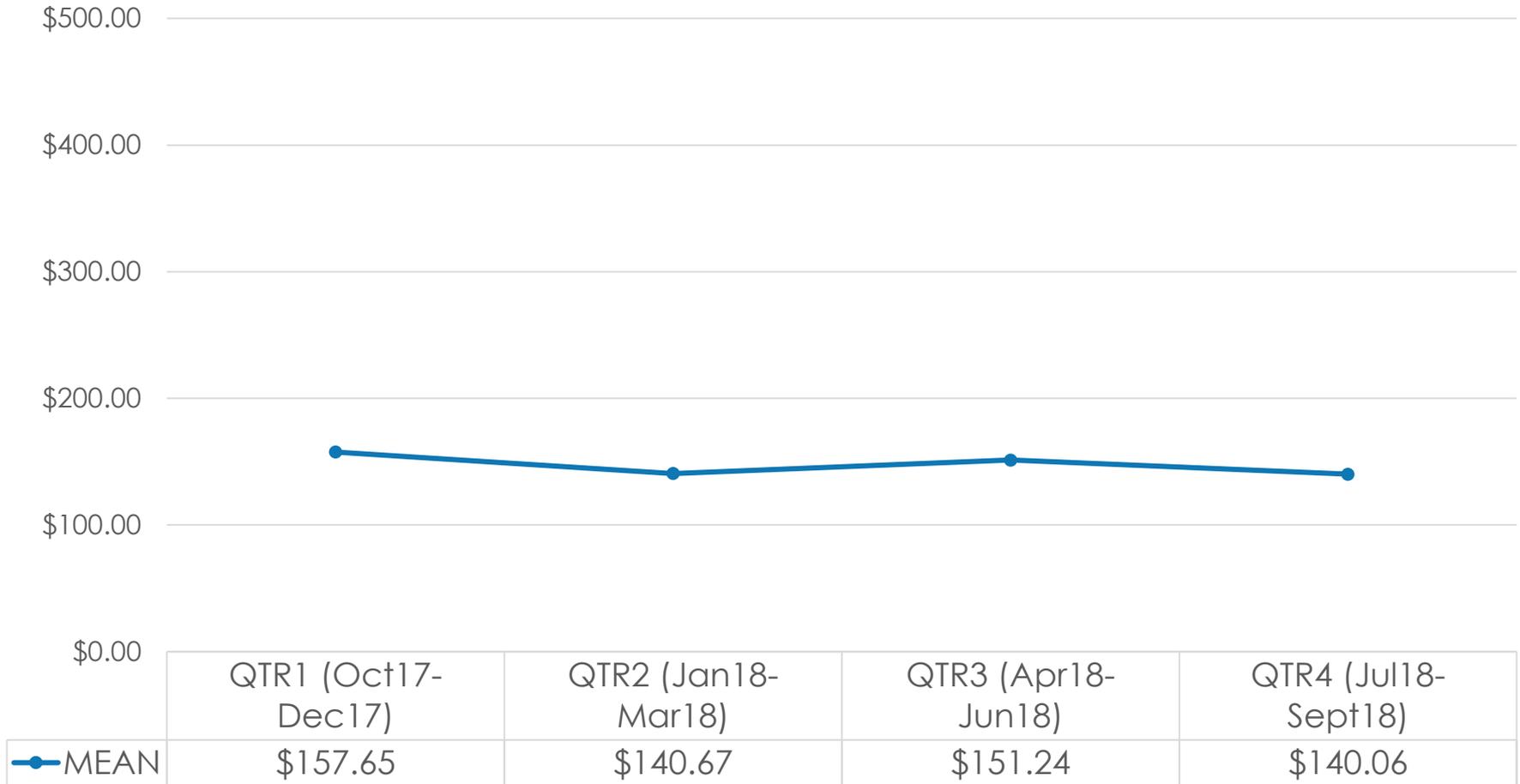
On-Island – FY2018 Tracking

Gift/ Souvenir – Self/ Companion



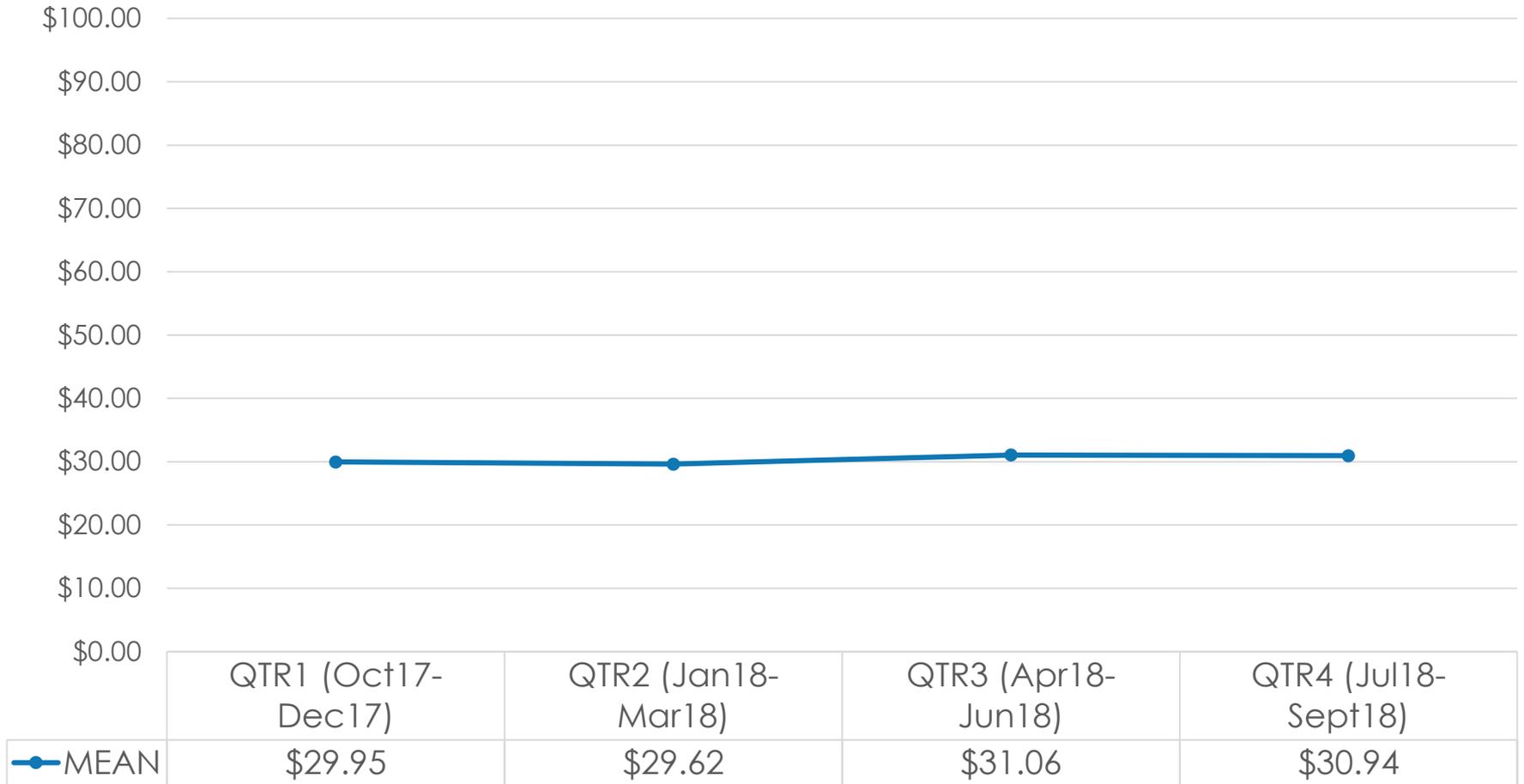
On-Island – FY2018 Tracking

Gift/ Souvenir – Friends/ Family



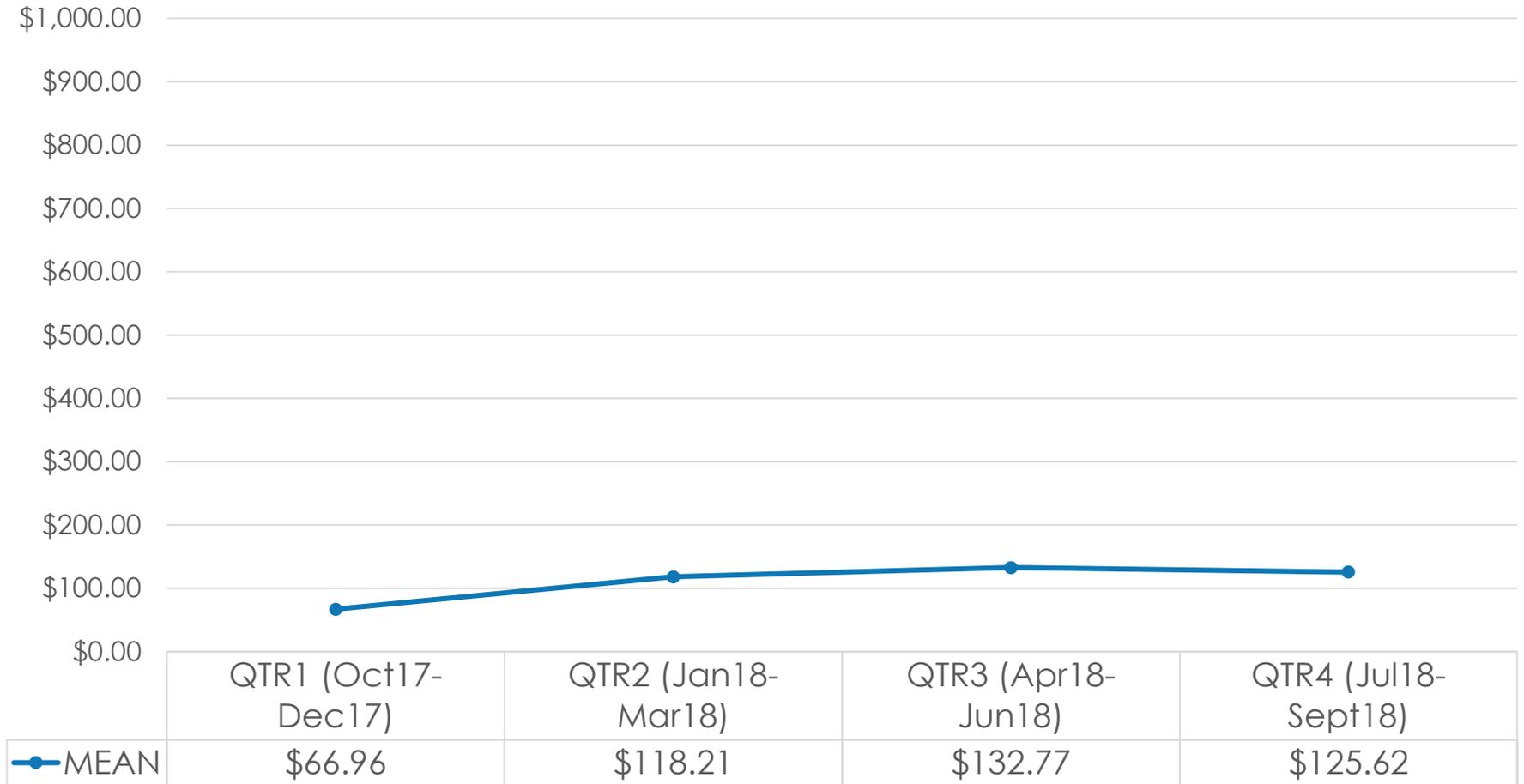
On-Island – FY2018 Tracking

Local Transportation



On-Island – FY2018 Tracking

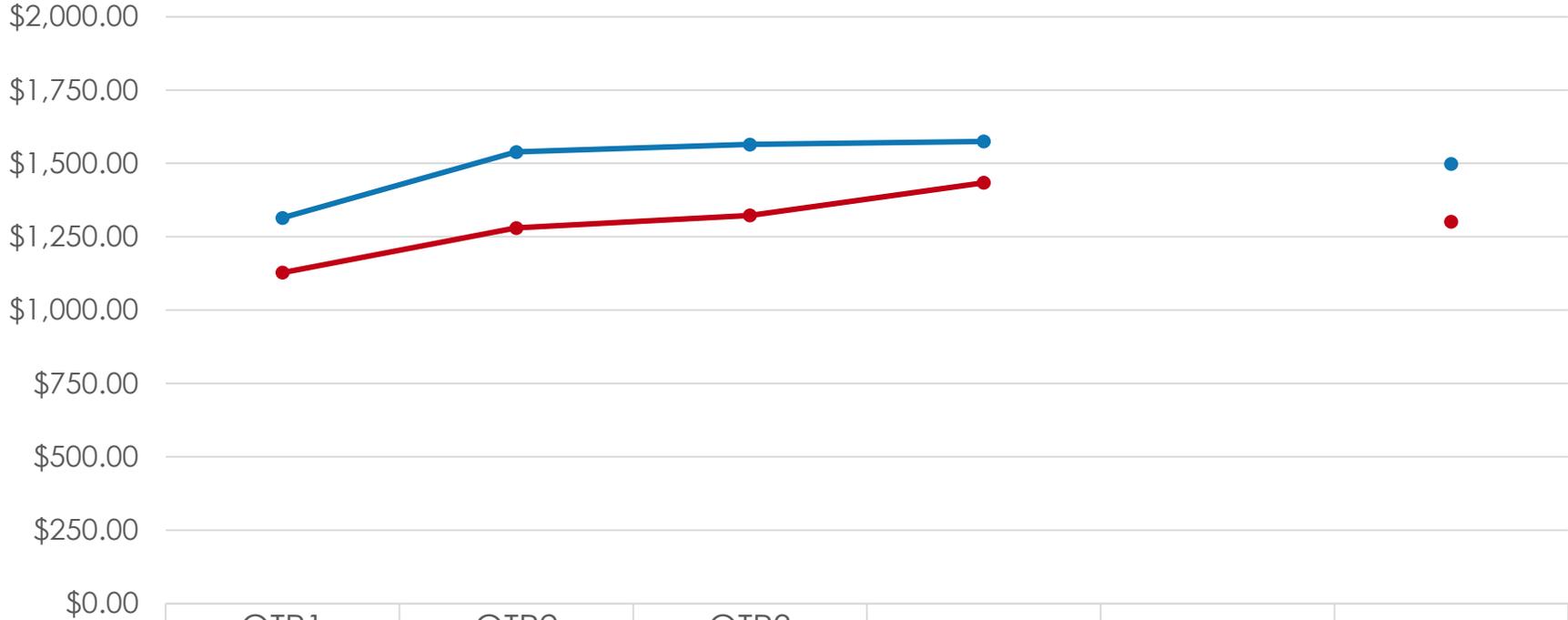
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,574.82 = TOTAL Per Person Expenditure

TOTAL Per Person Expenditures – FY2018 Tracking



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)	YTD
MEAN	\$1,314.80	\$1,539.31	\$1,564.45	\$1,574.82	\$1,498.91
MEDIAN	\$1,128.00	\$1,280.00	\$1,323.00	\$1,434.00	\$1,302.00

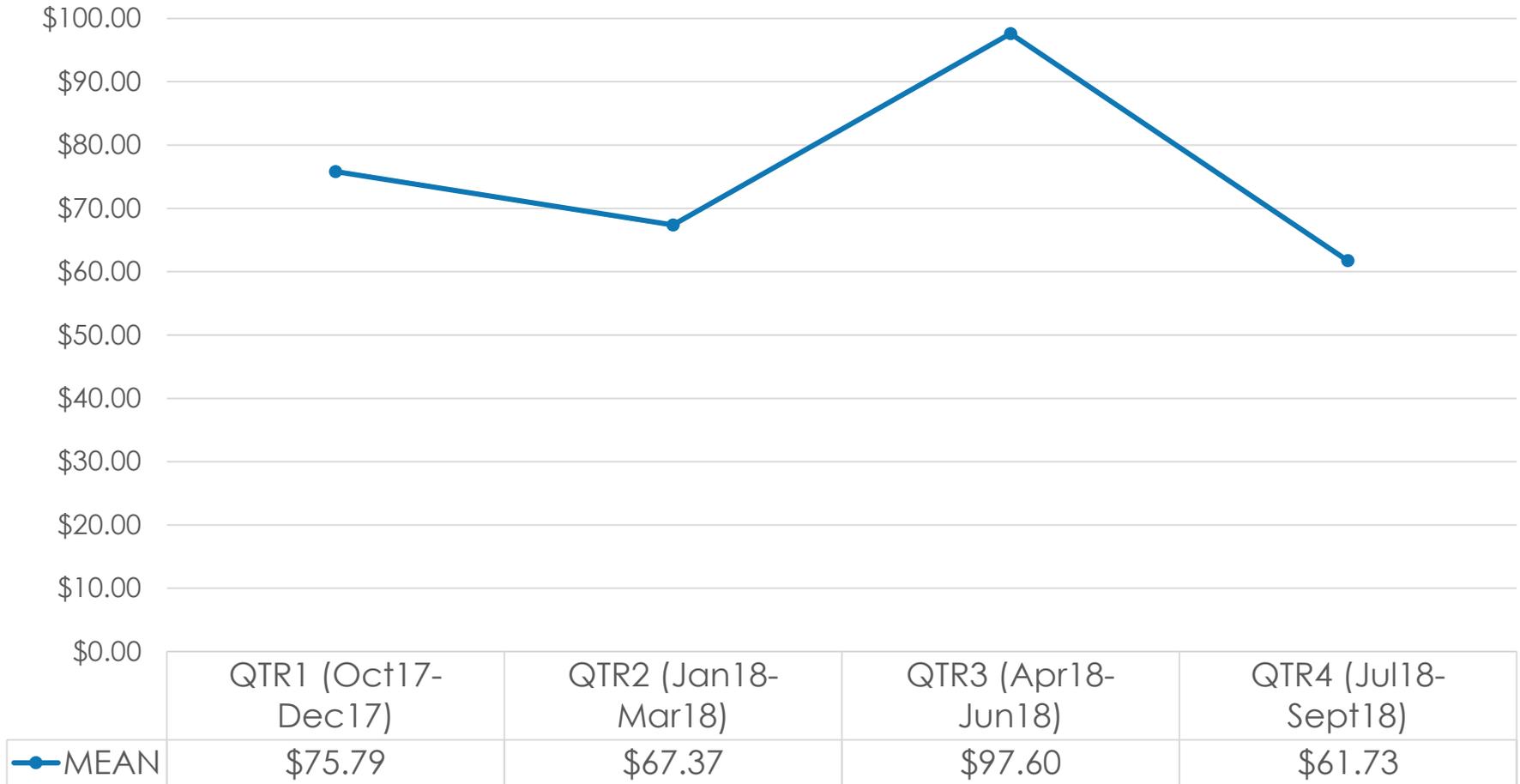
TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY
TOTAL PER PERSON SPENDING**

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,574.82	\$1,690.97	\$1,588.27	\$1,657.93	\$1,393.12	\$692.02	\$2,209.21	\$1,478.82
	Median	\$1,434	\$1,508	\$1,436	\$1,423	\$1,302	\$724	\$1,622	\$1,348

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

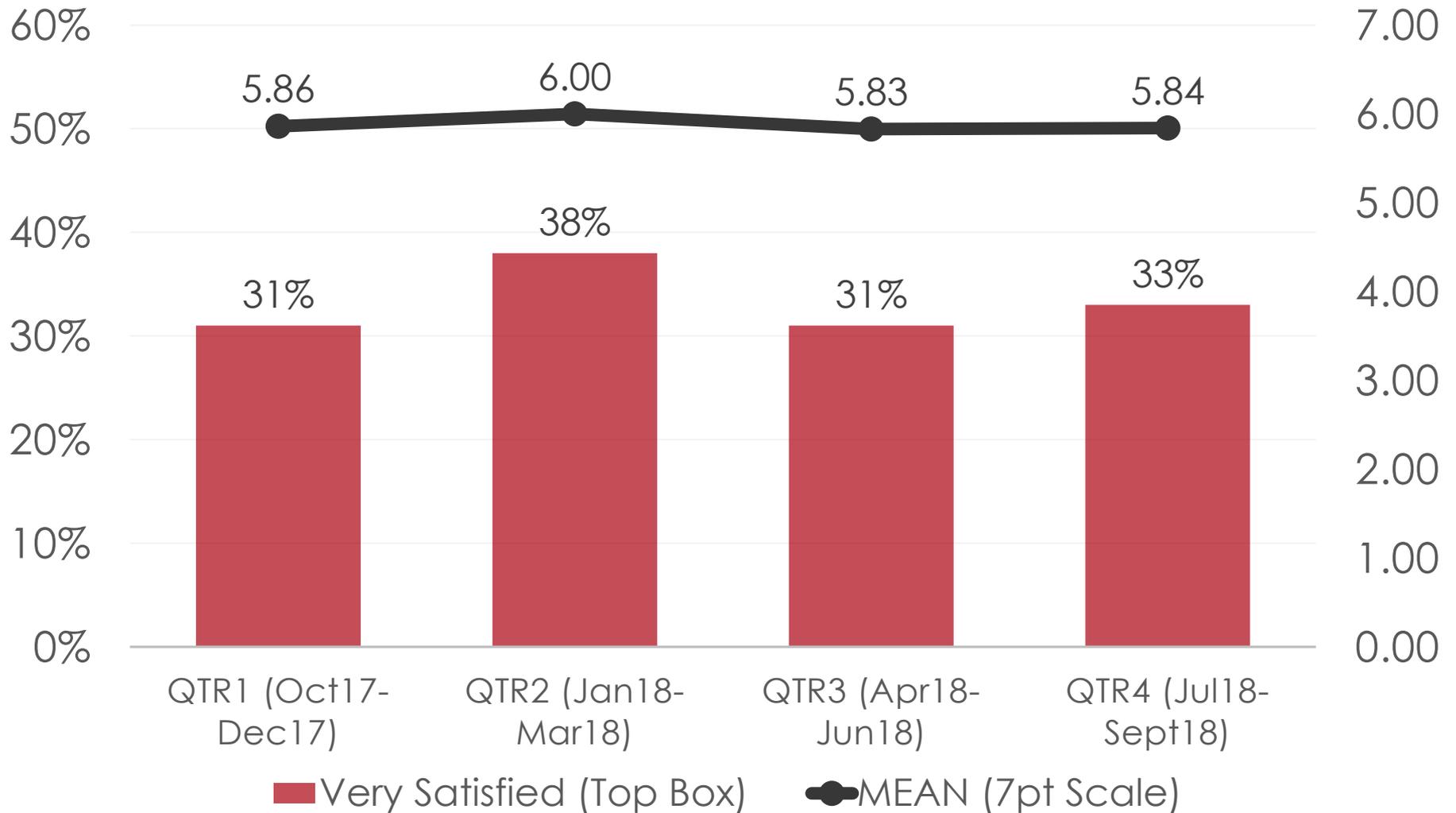


SECTION 4

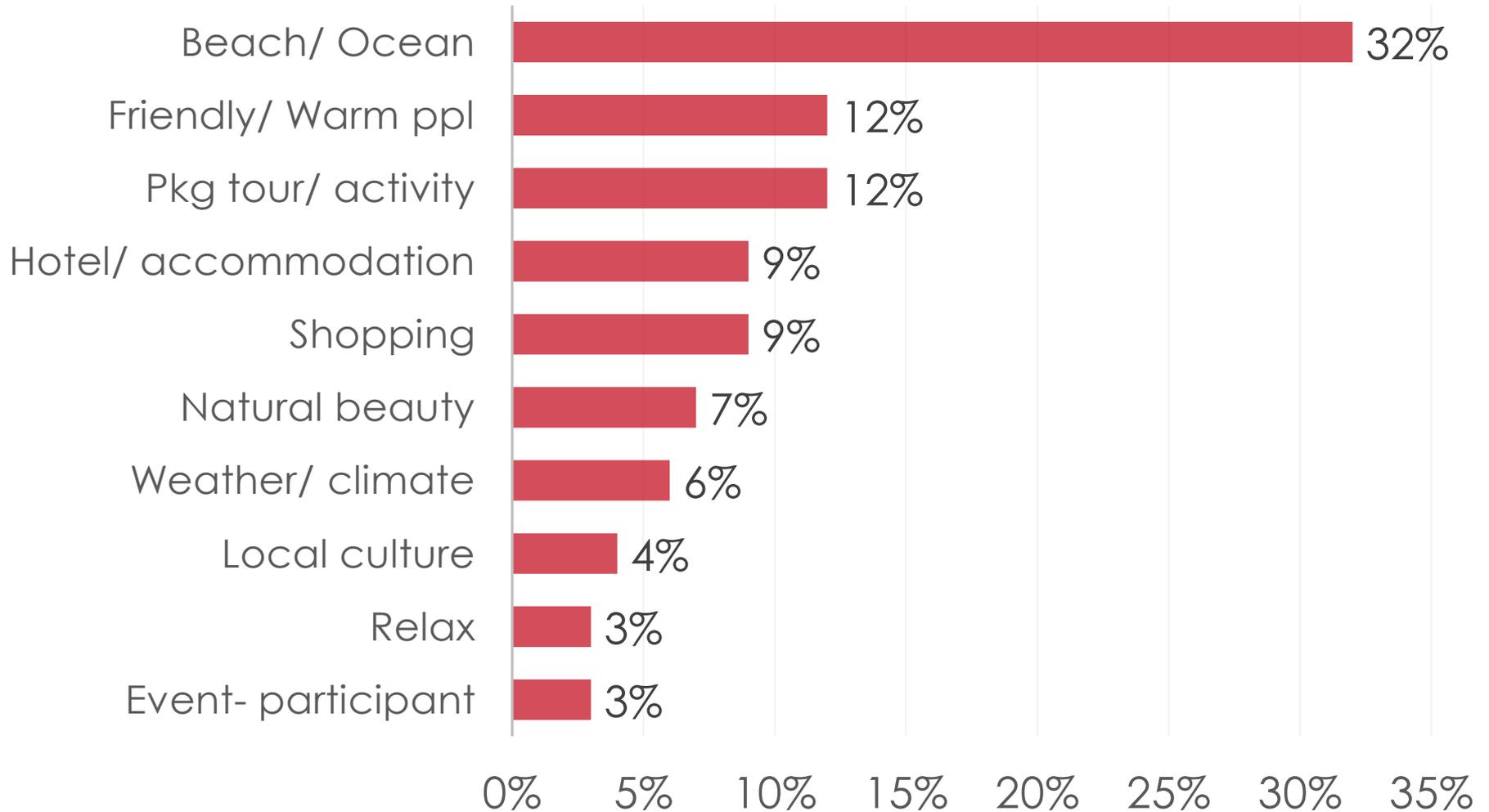
VISITOR SATISFACTION

BEHAVIOR

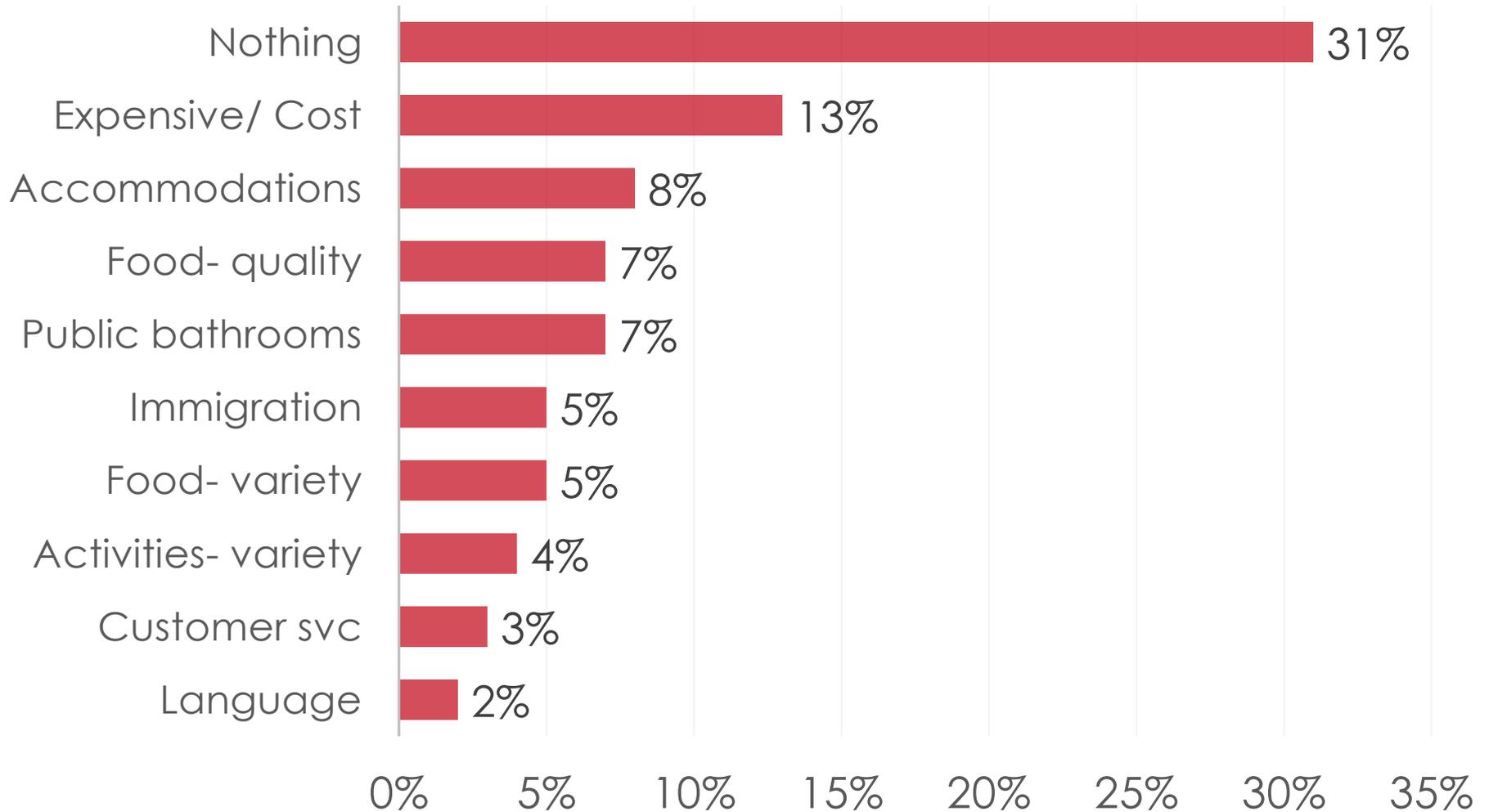
OVERALL SATISFACTION



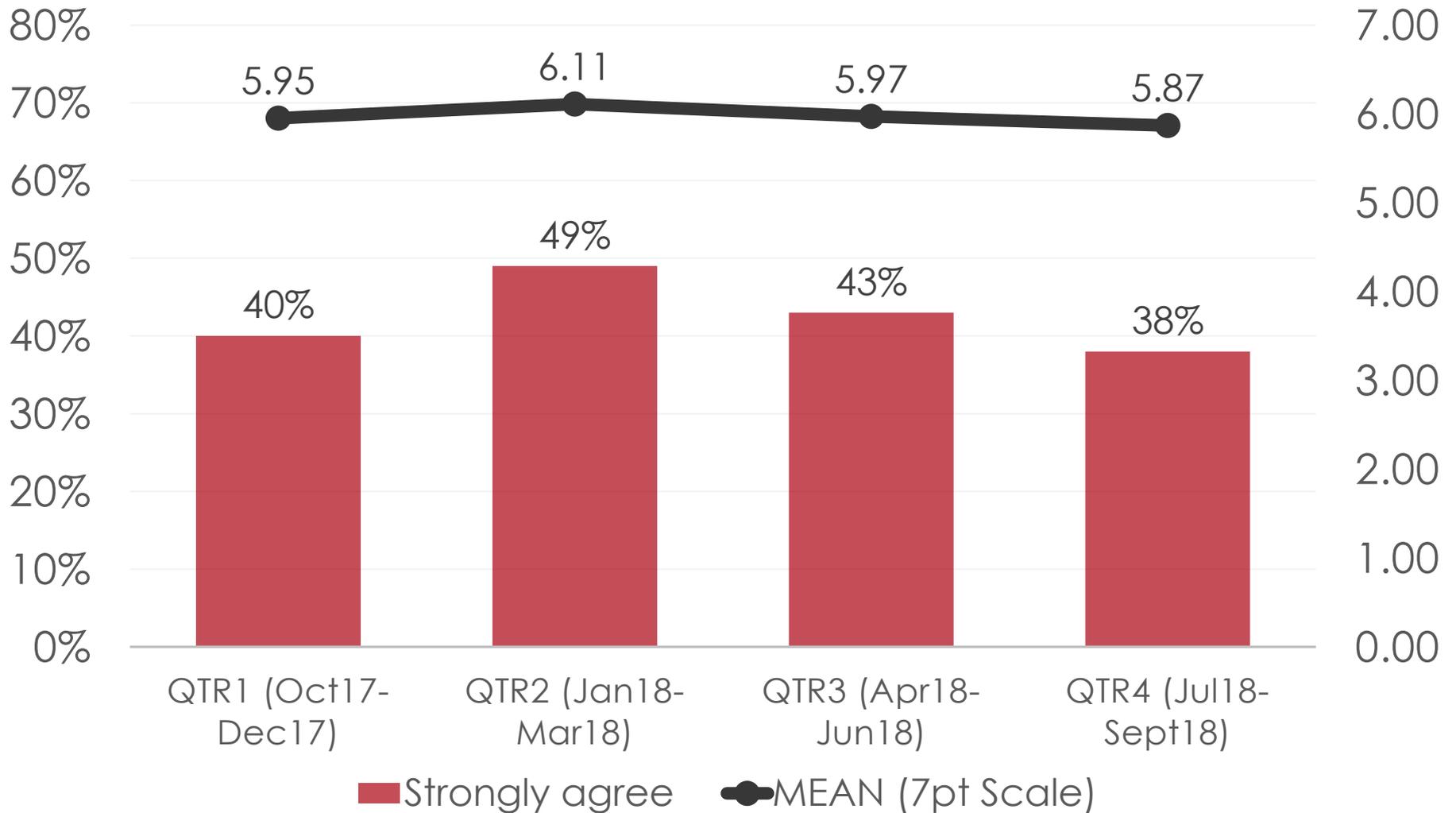
POSITIVE ASPECTS OF TRIP



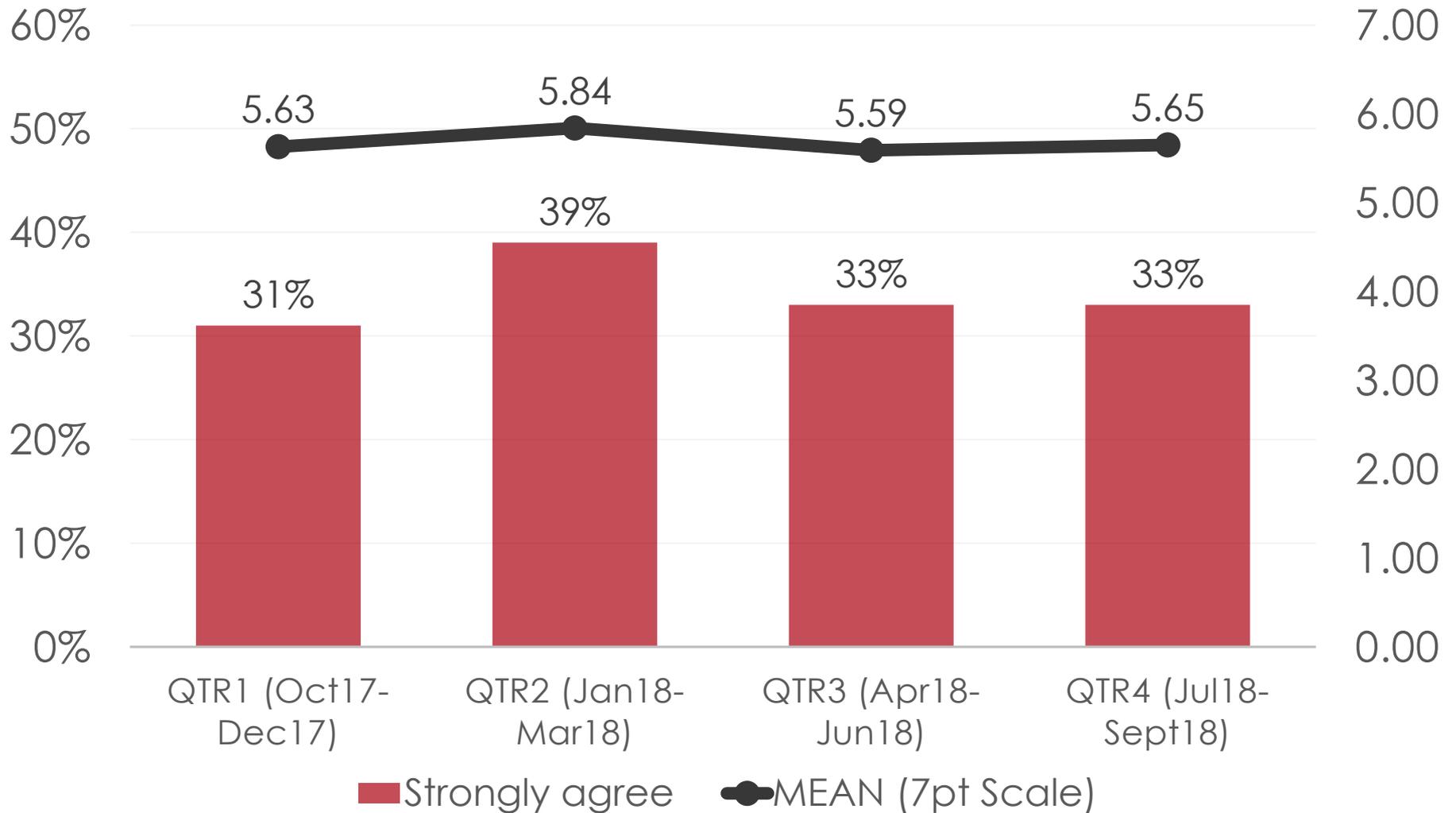
NEGATIVE ASPECTS OF TRIP



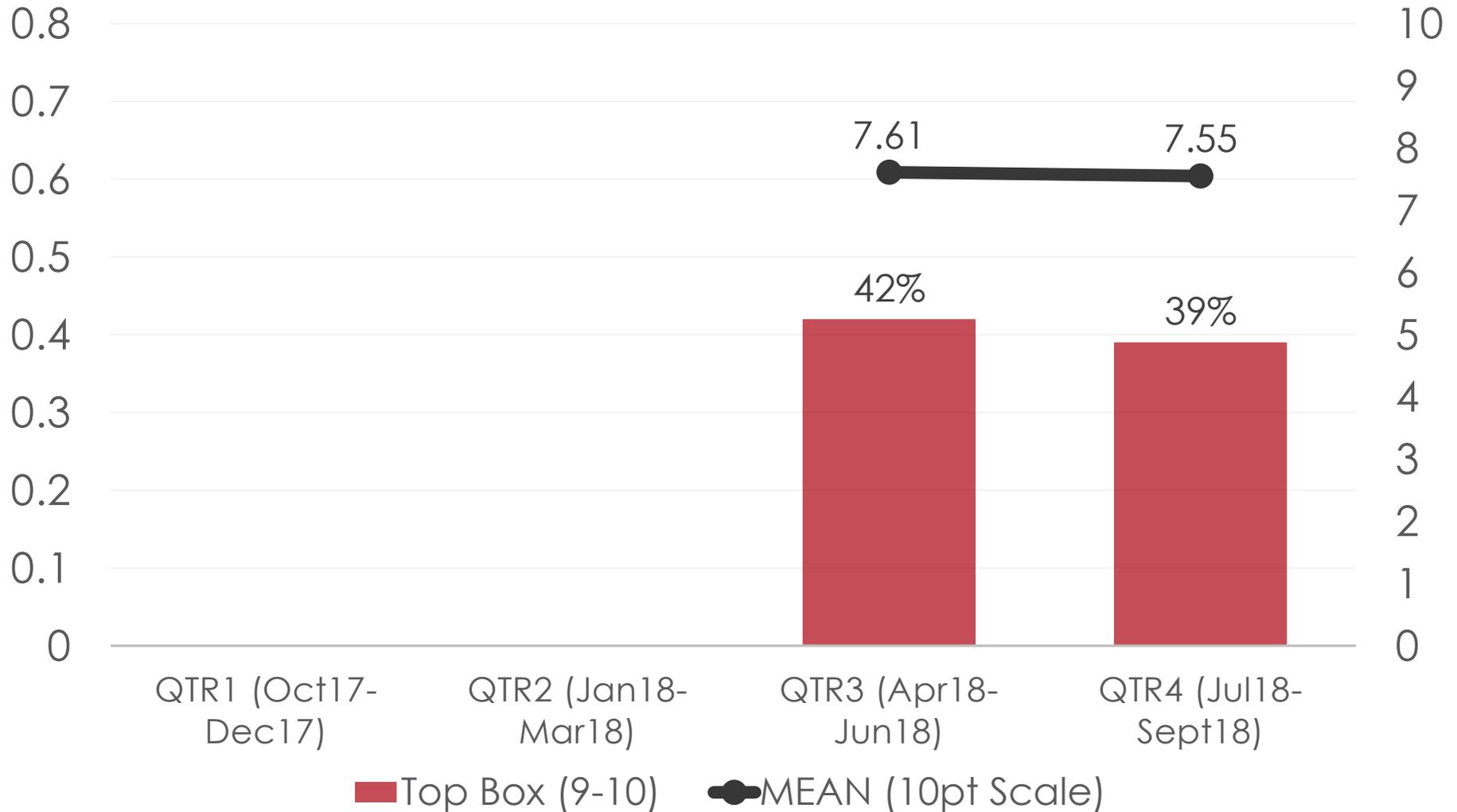
Guam was better than expected



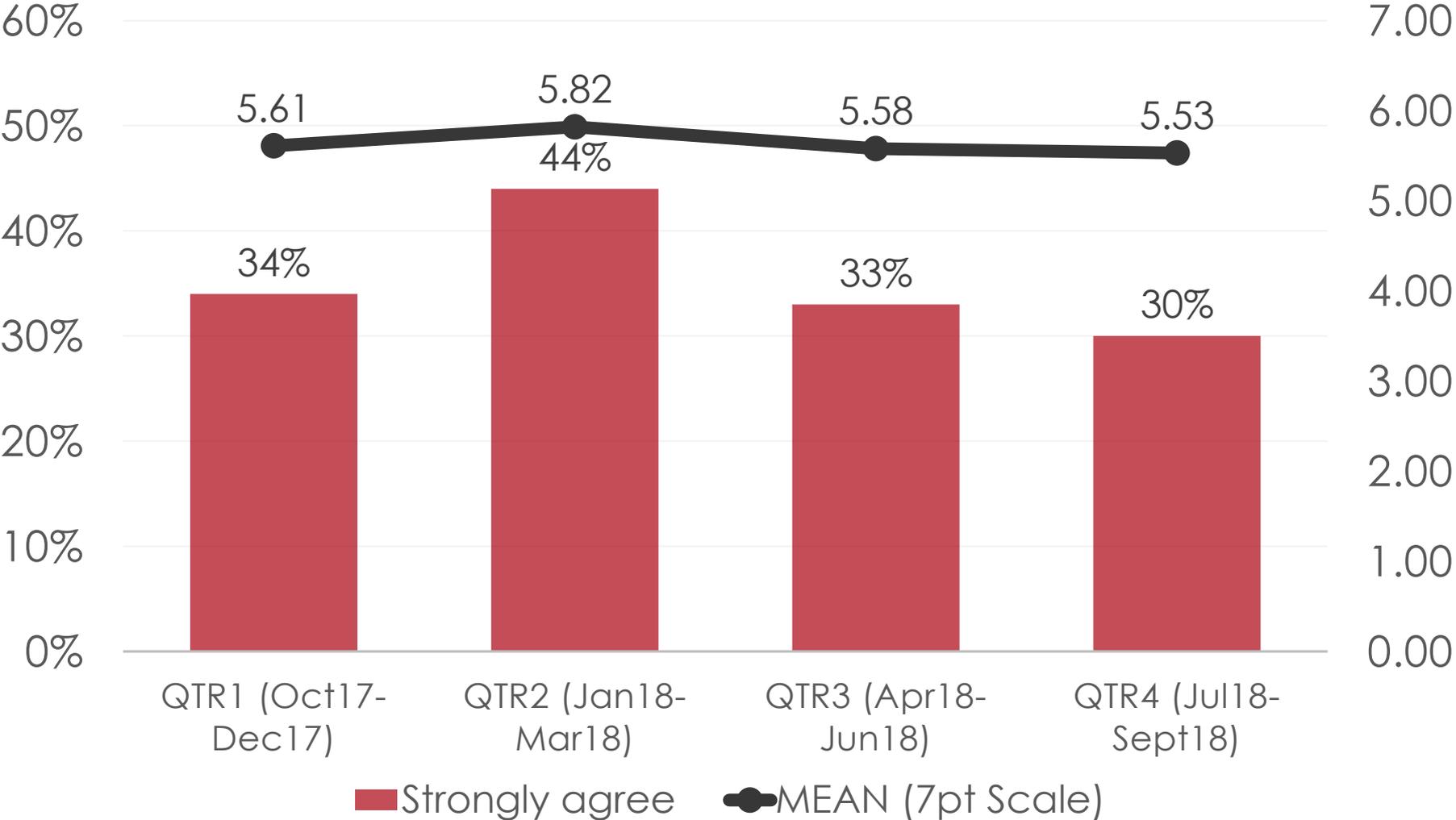
I had no communication problems



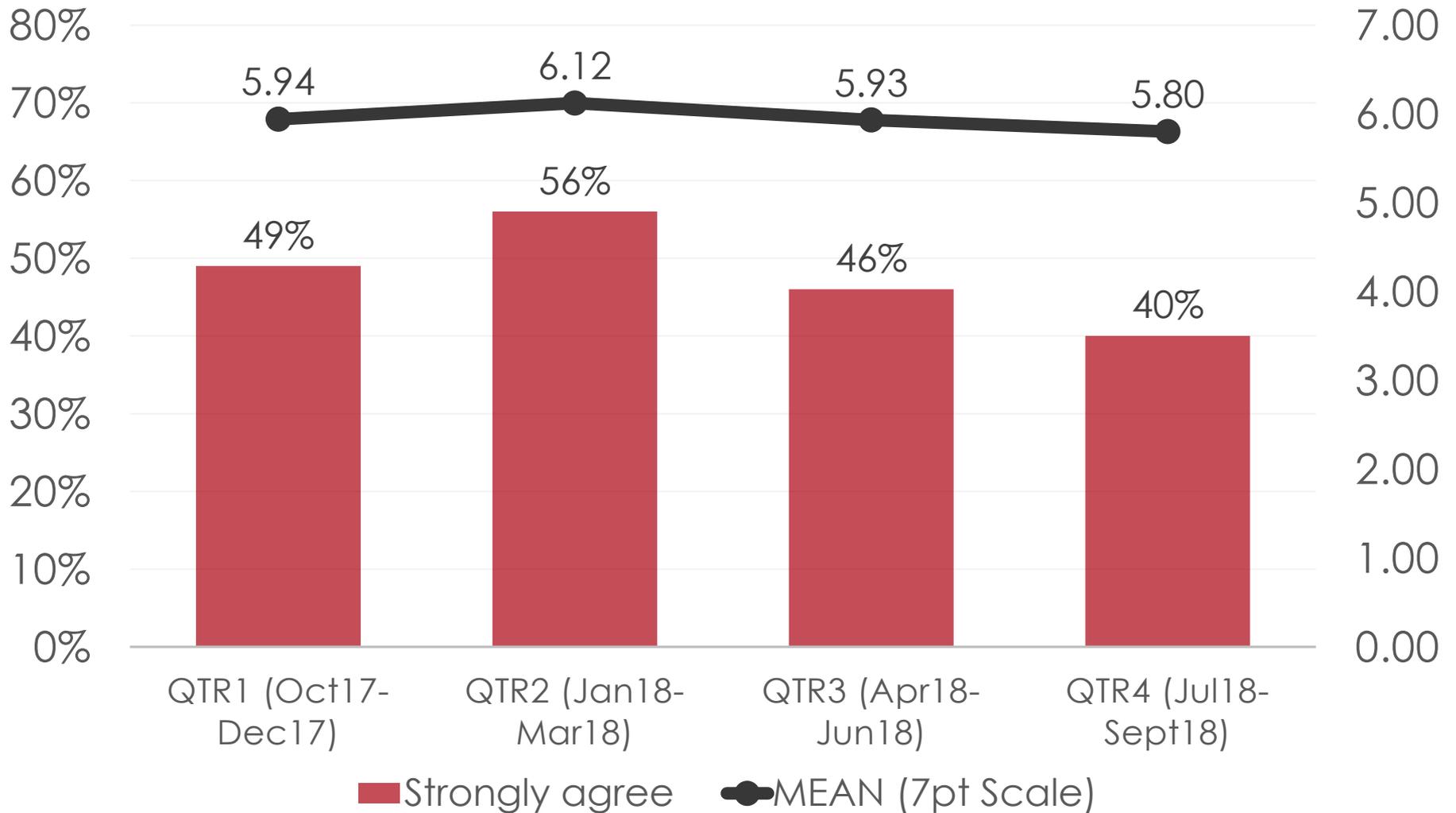
Recommend Guam - family & friends



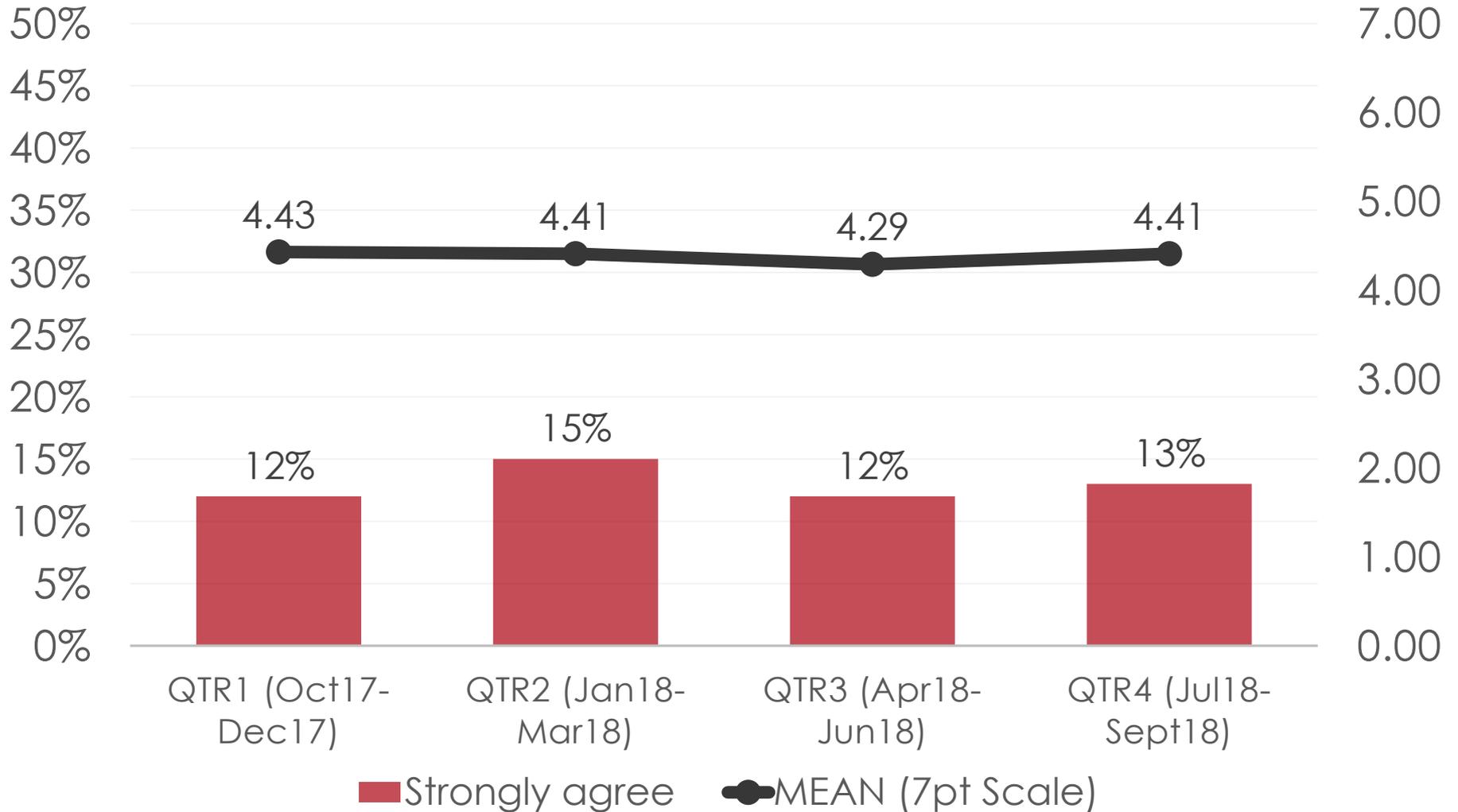
Sites on Guam were attractive



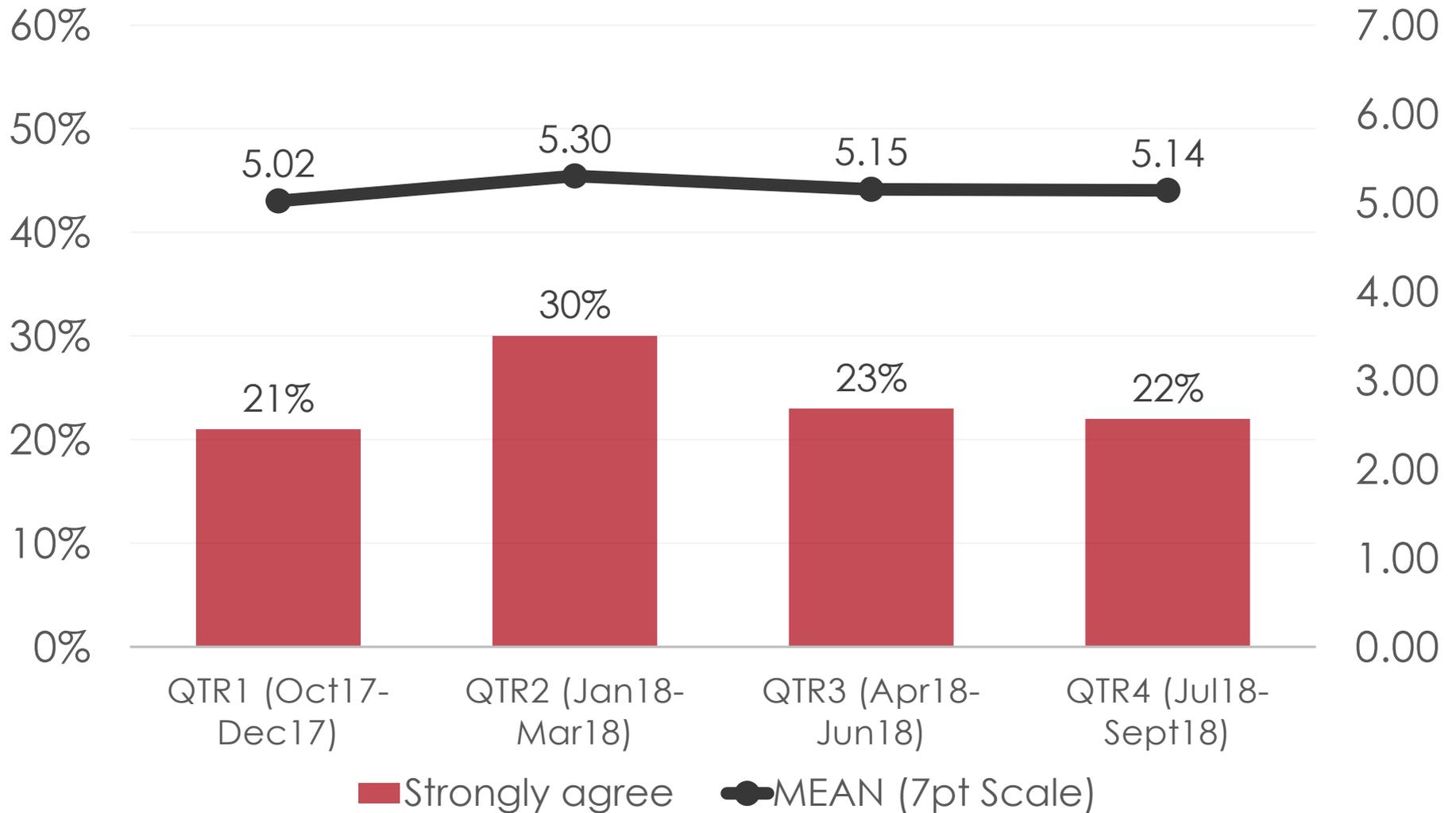
I plan to visit Guam again



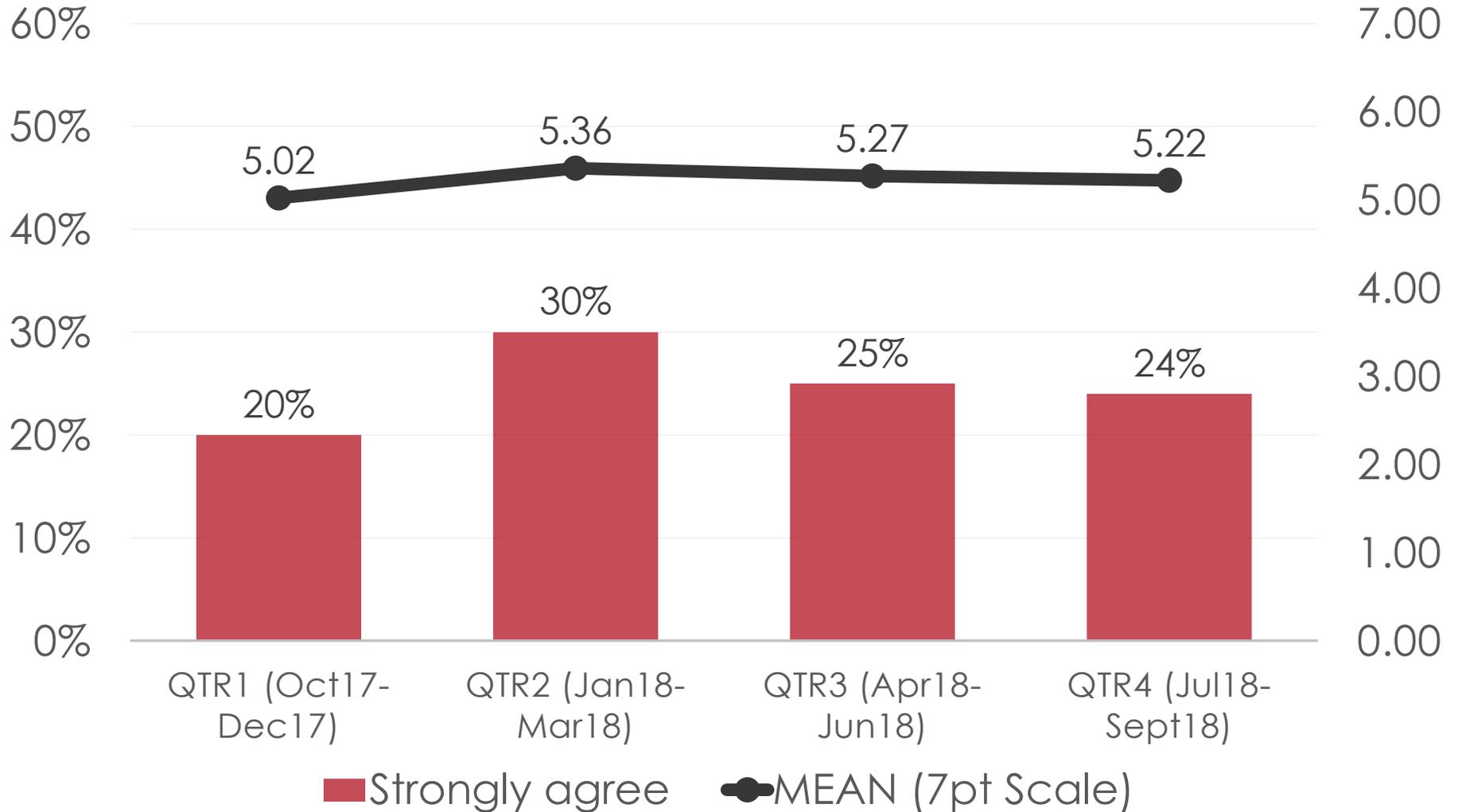
Not enough night time activities



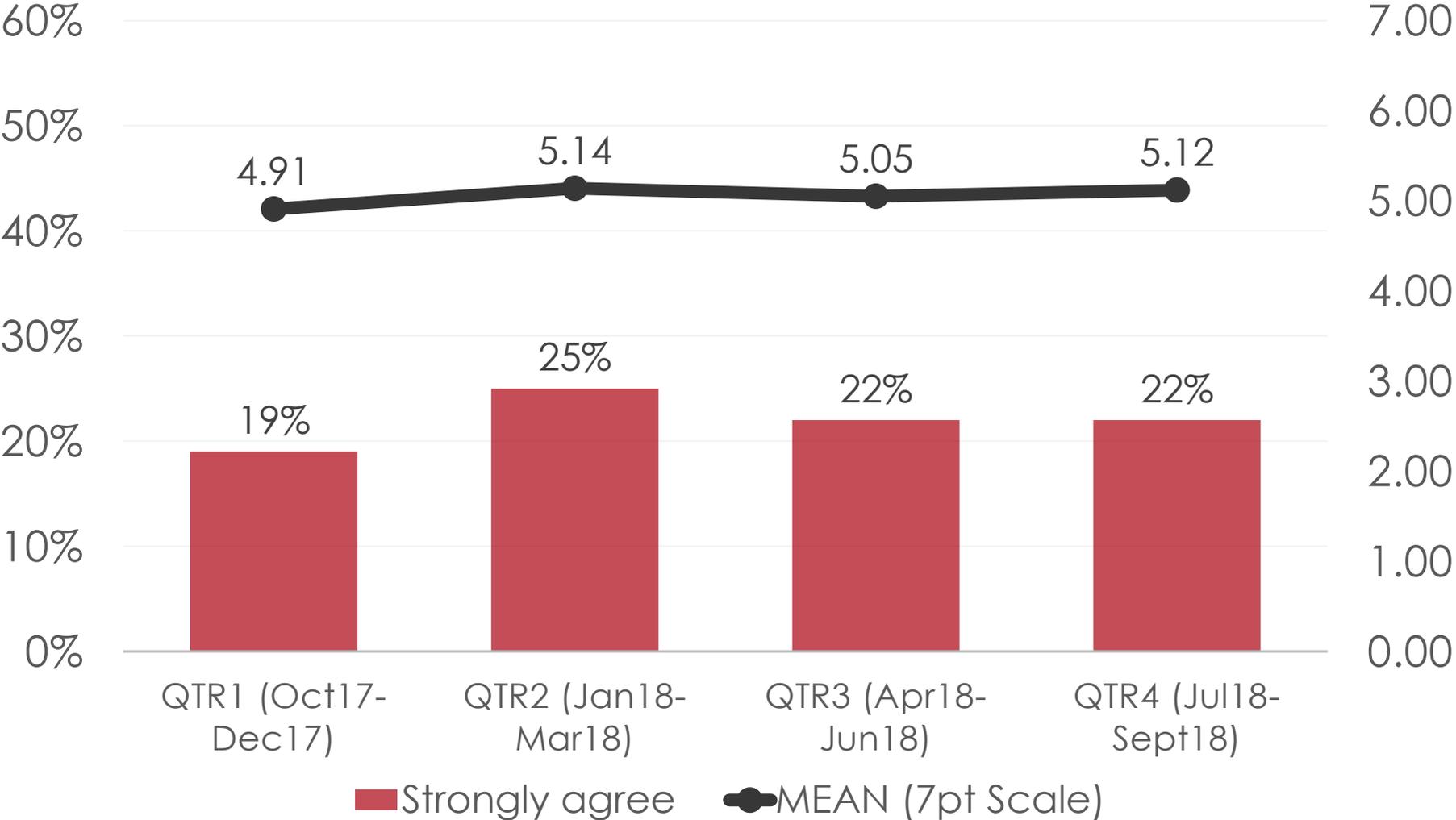
Tour guides were professional



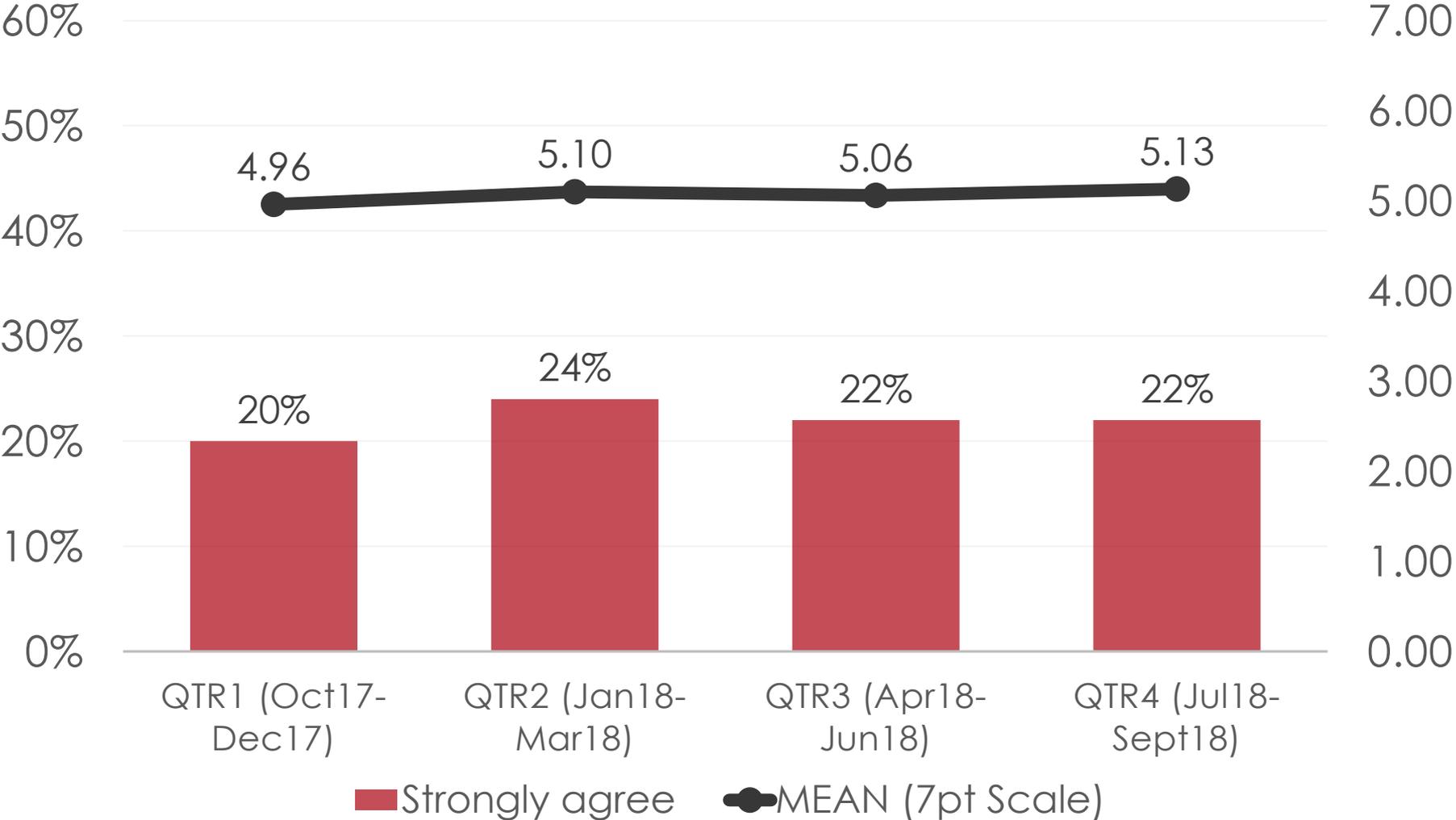
Tour drivers were professional



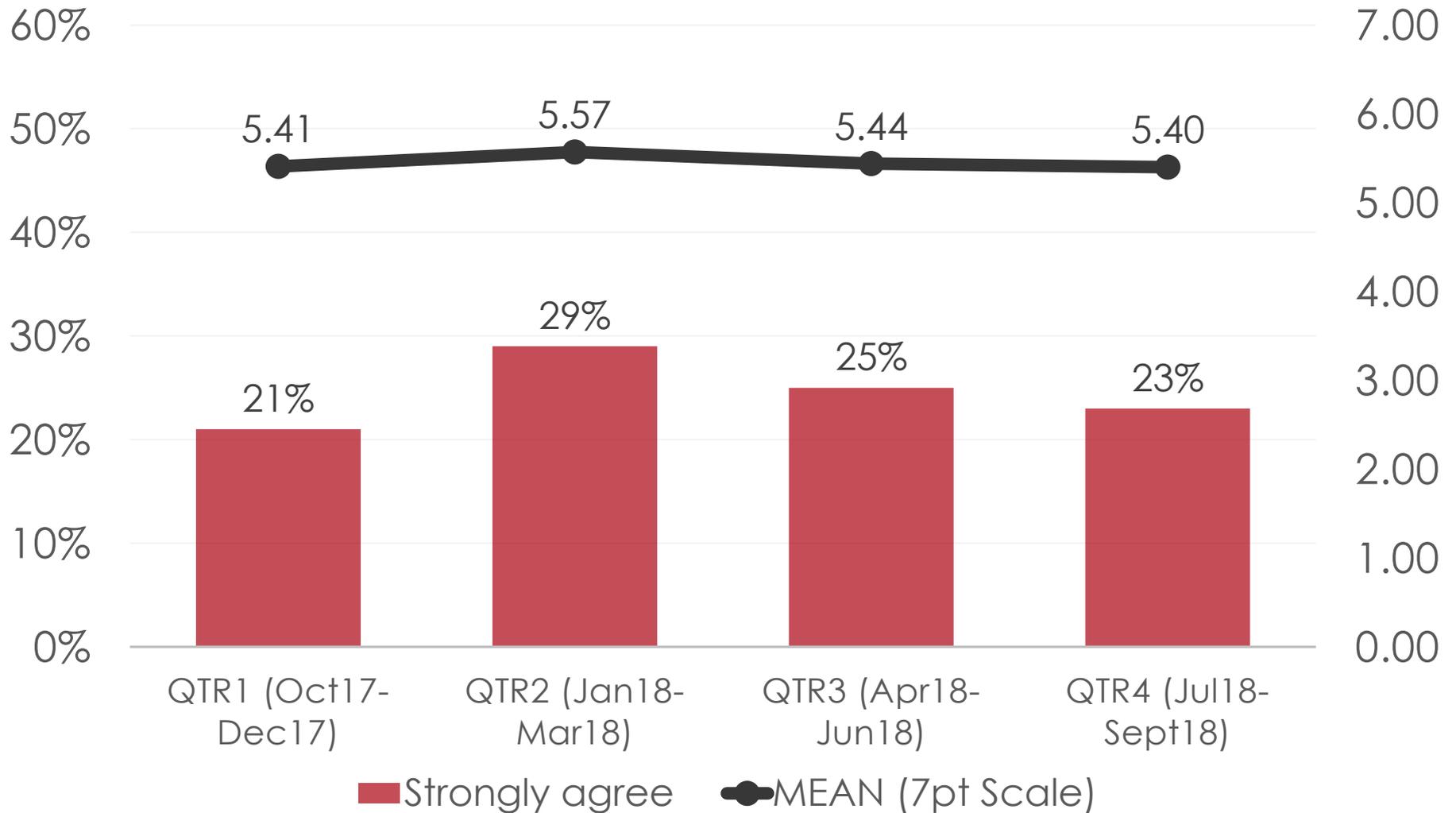
Taxi drivers were professional



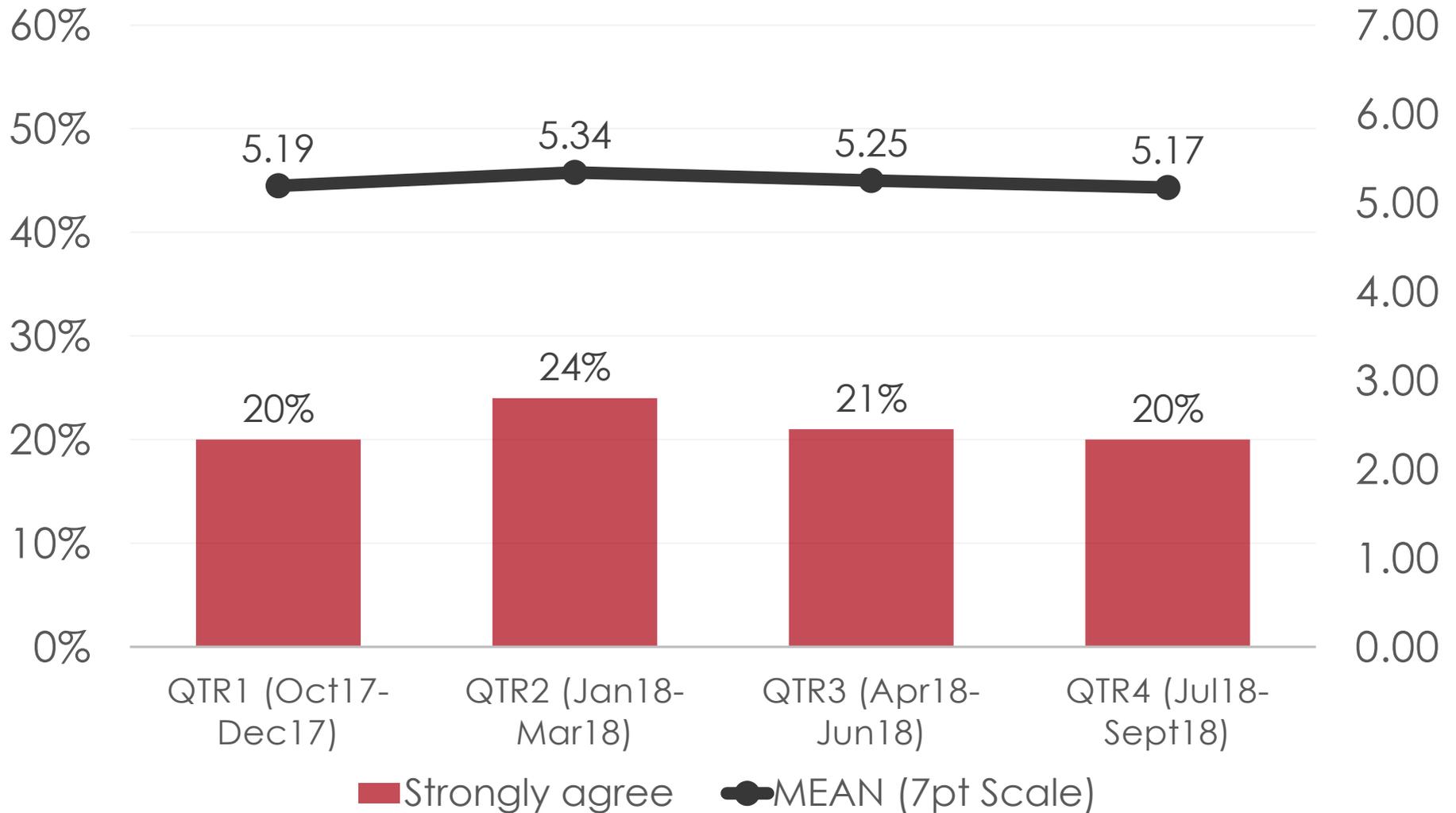
Taxis were clean



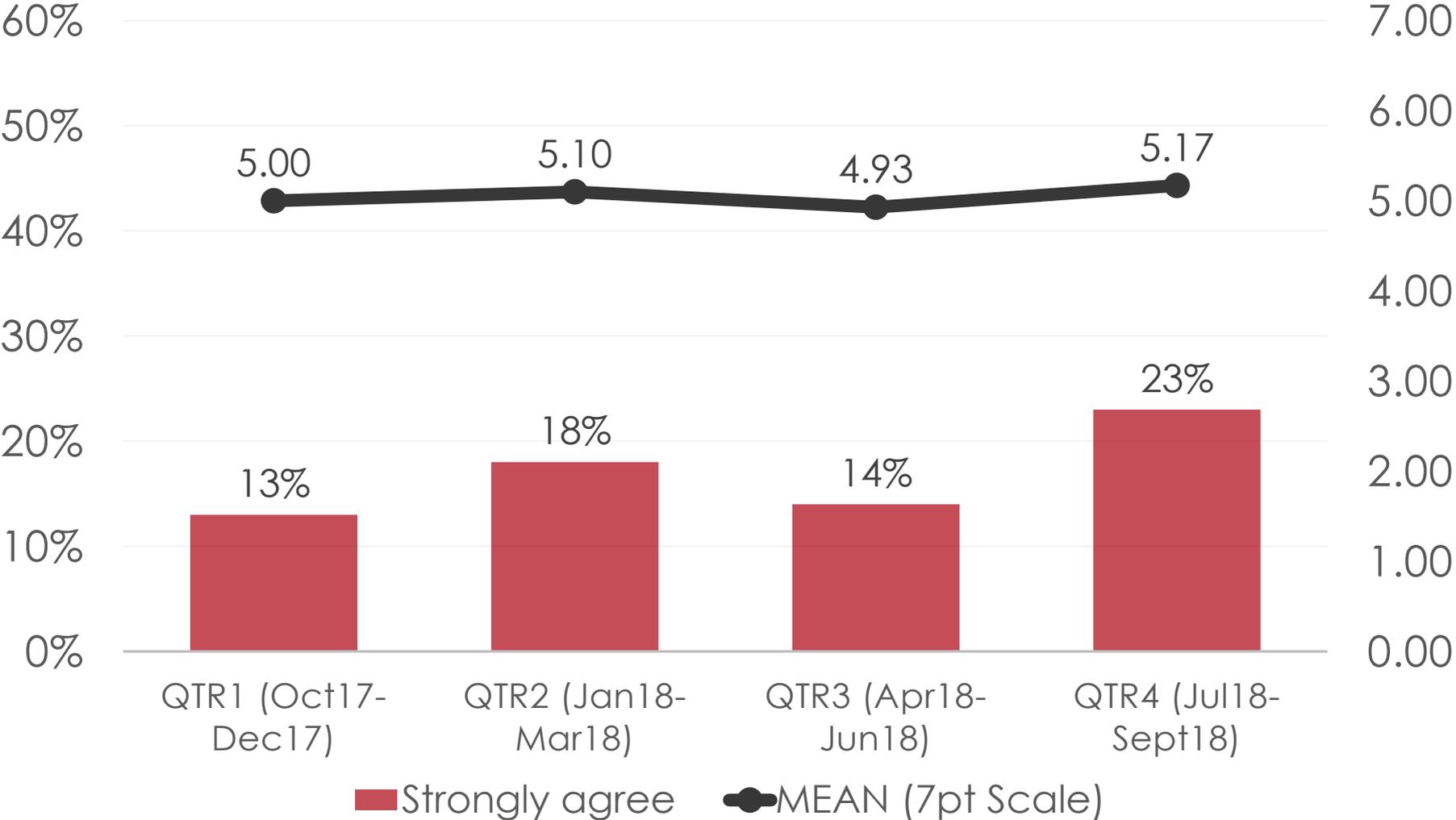
Guam airport was clean



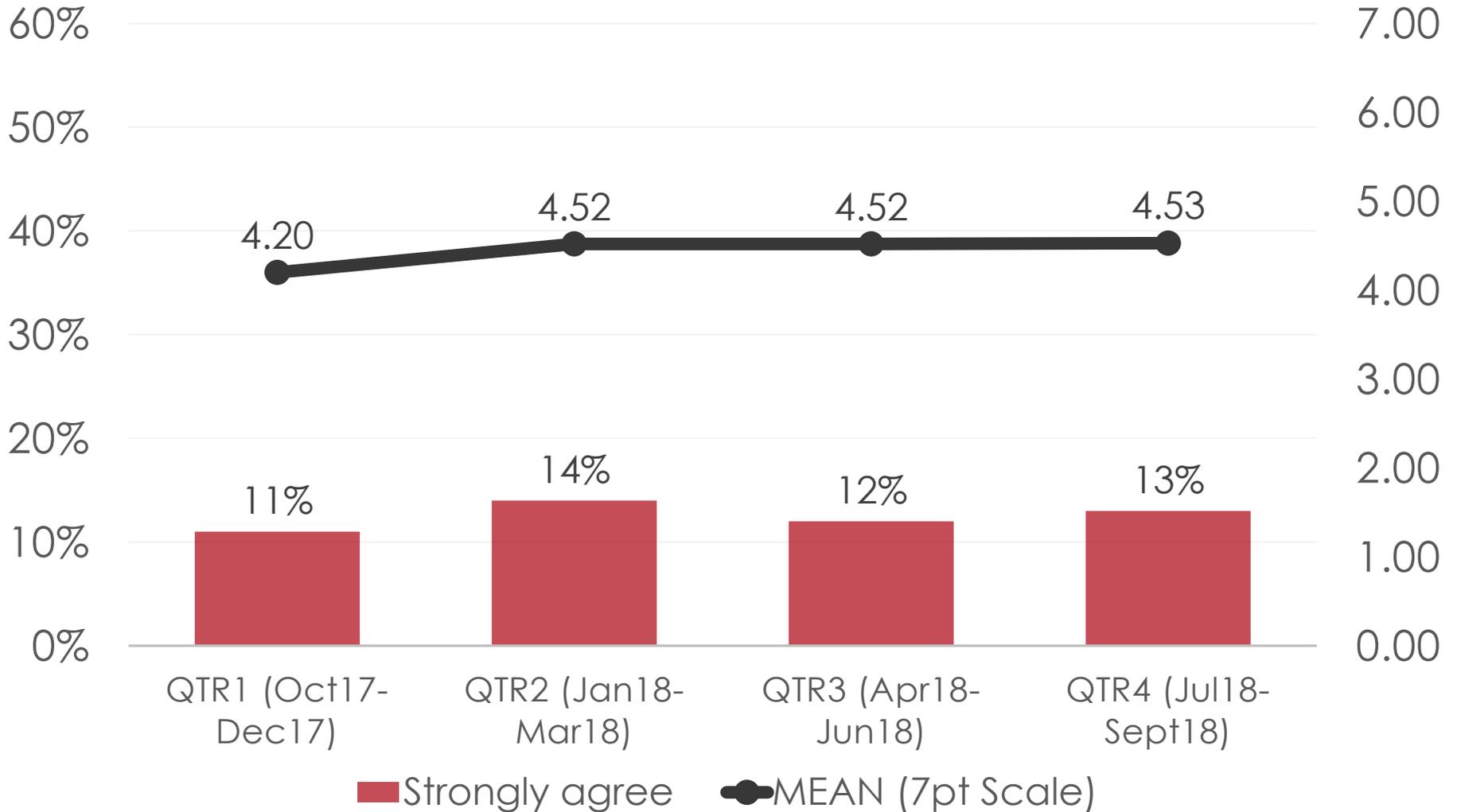
Ease of getting around



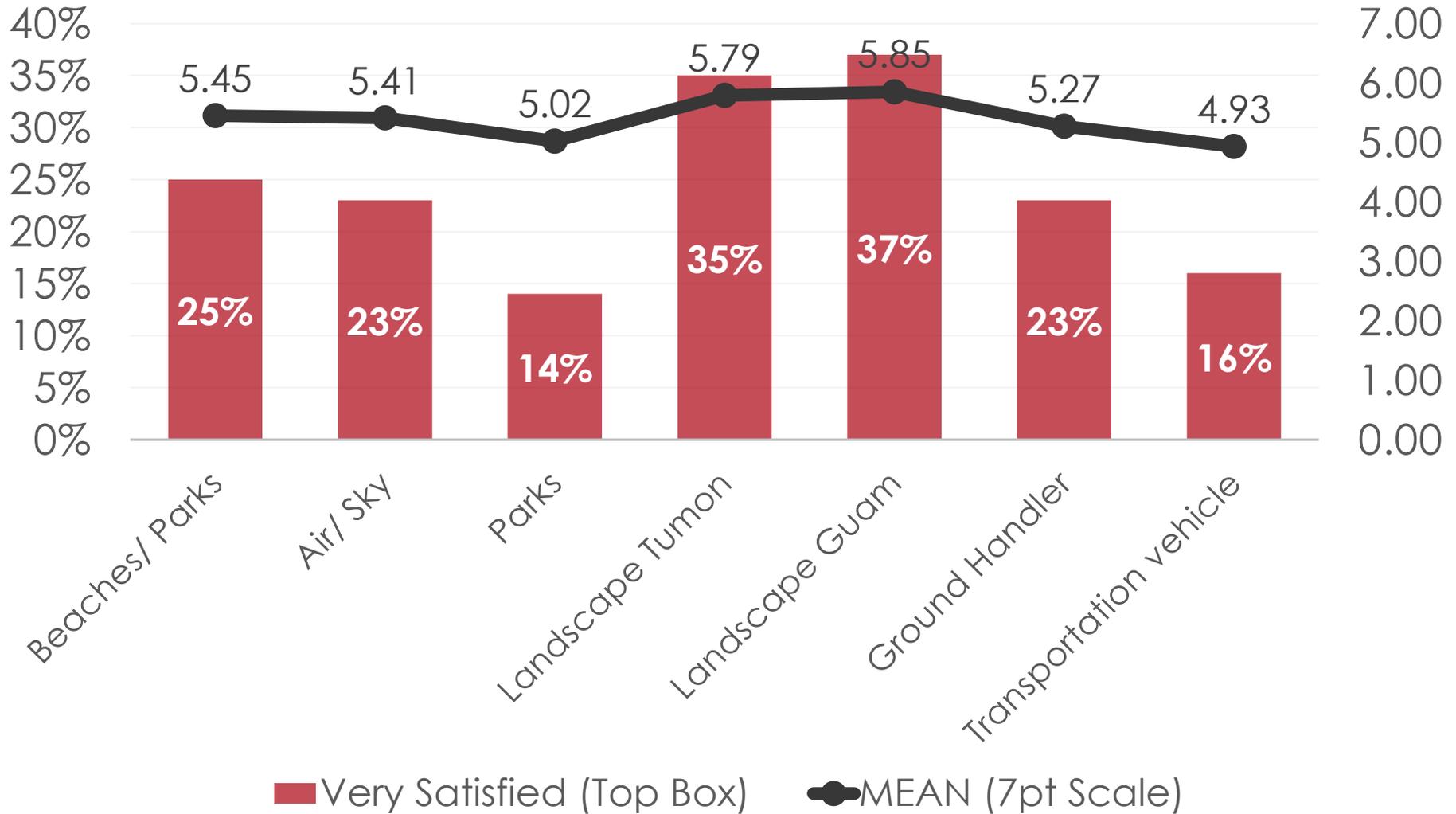
Safety walking around at night



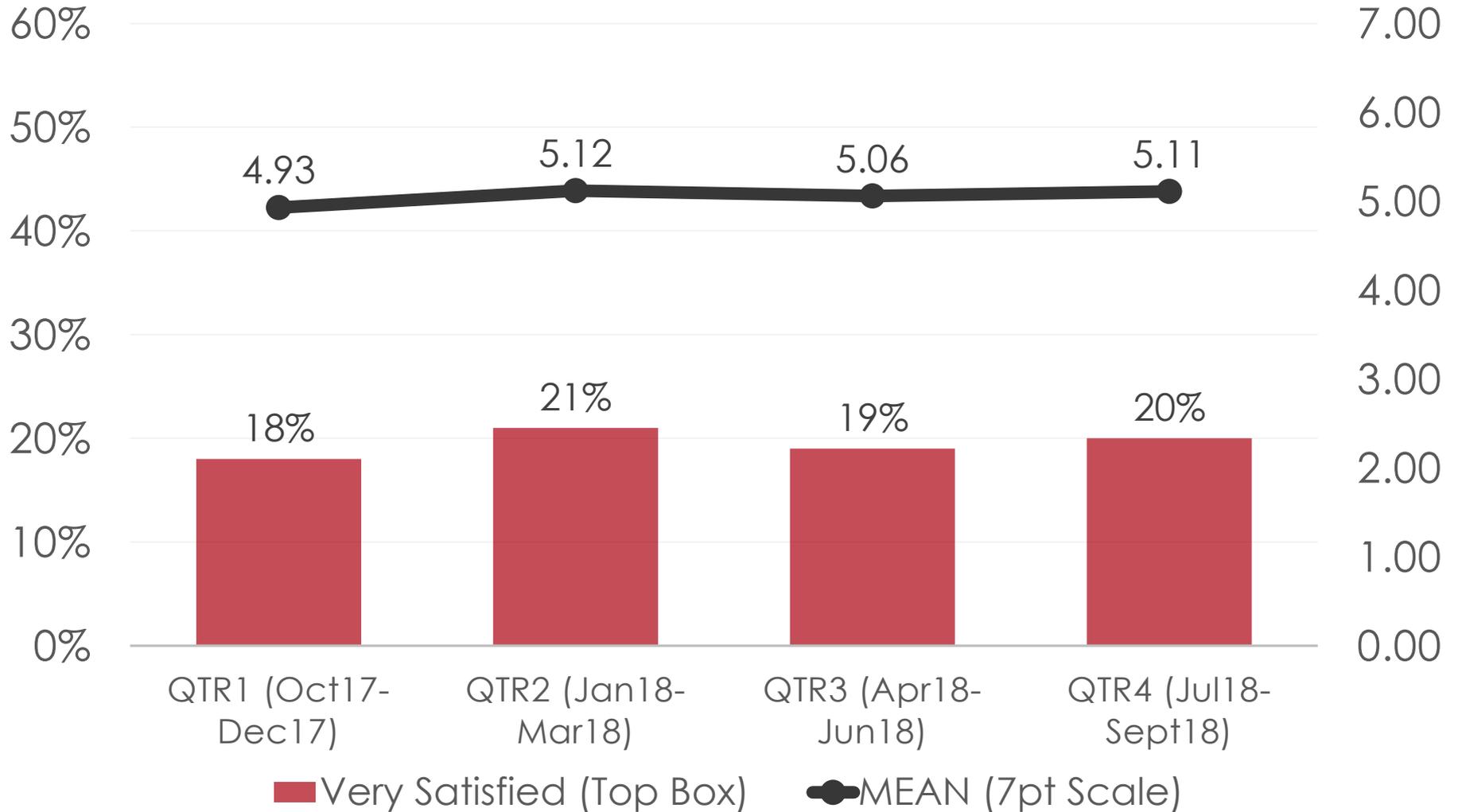
Price of things on Guam



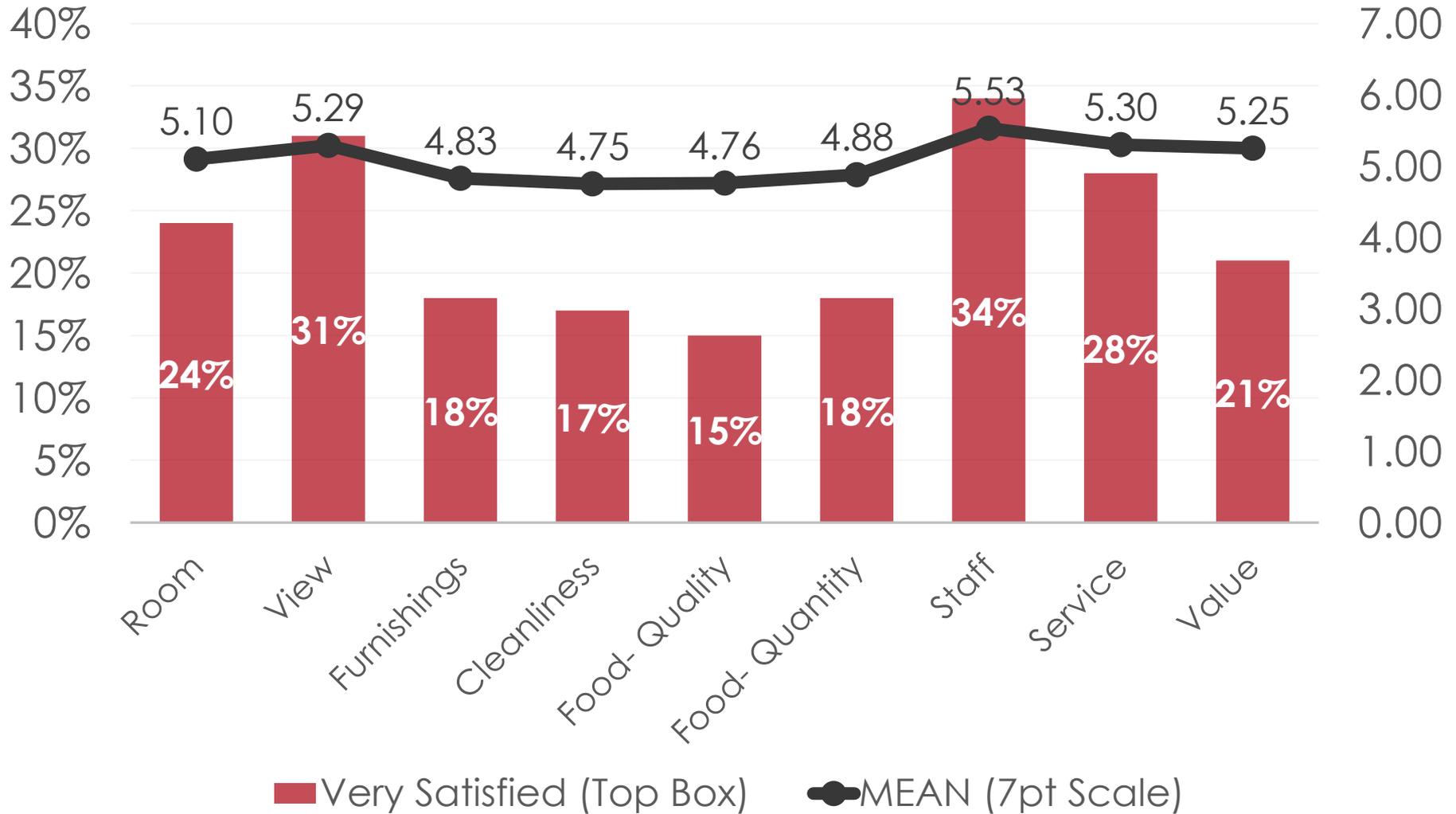
GENERAL SATISFACTION – Quality/ Cleanliness



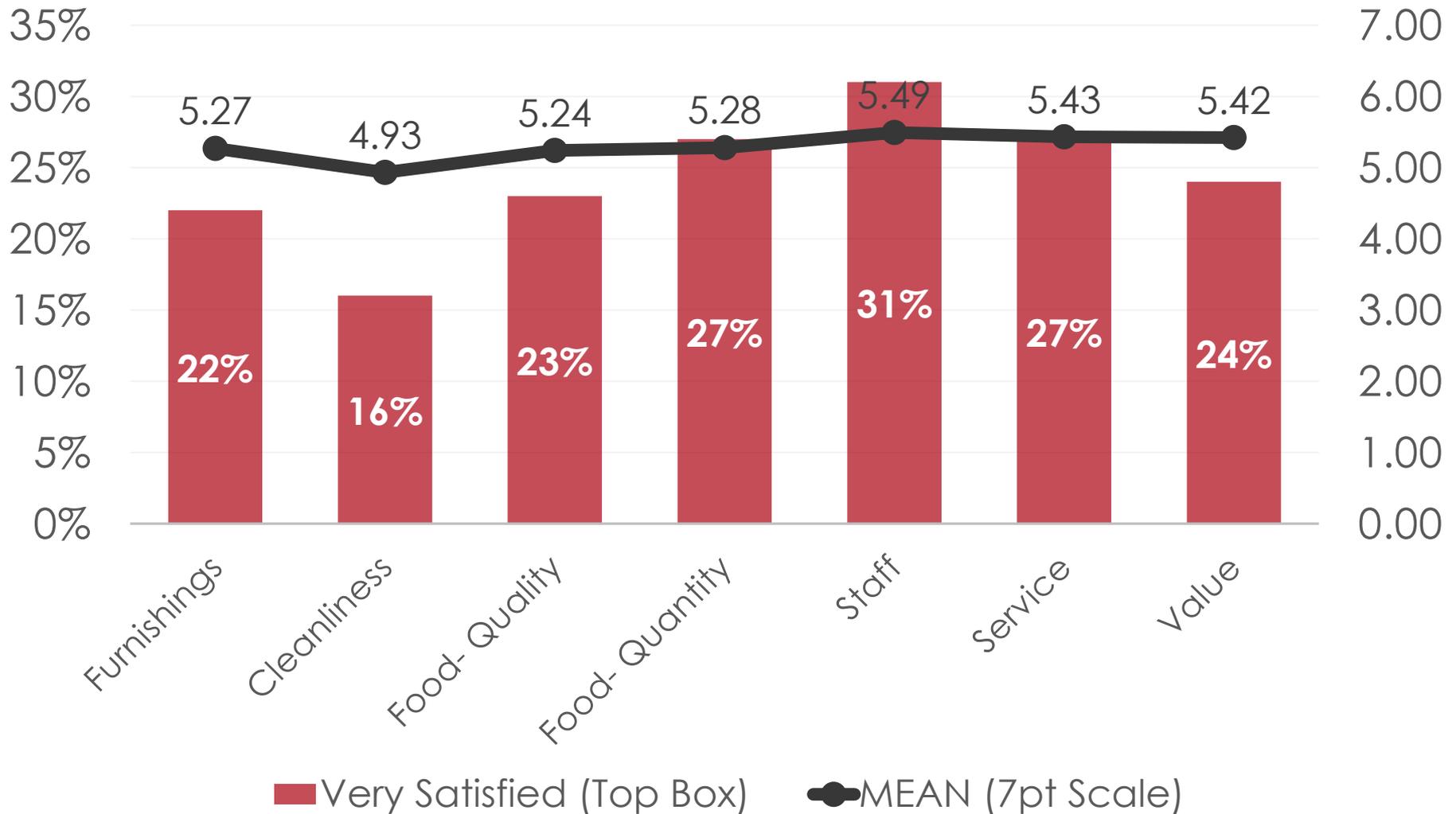
ACCOMMODATIONS – OVERALL SATISFACTION



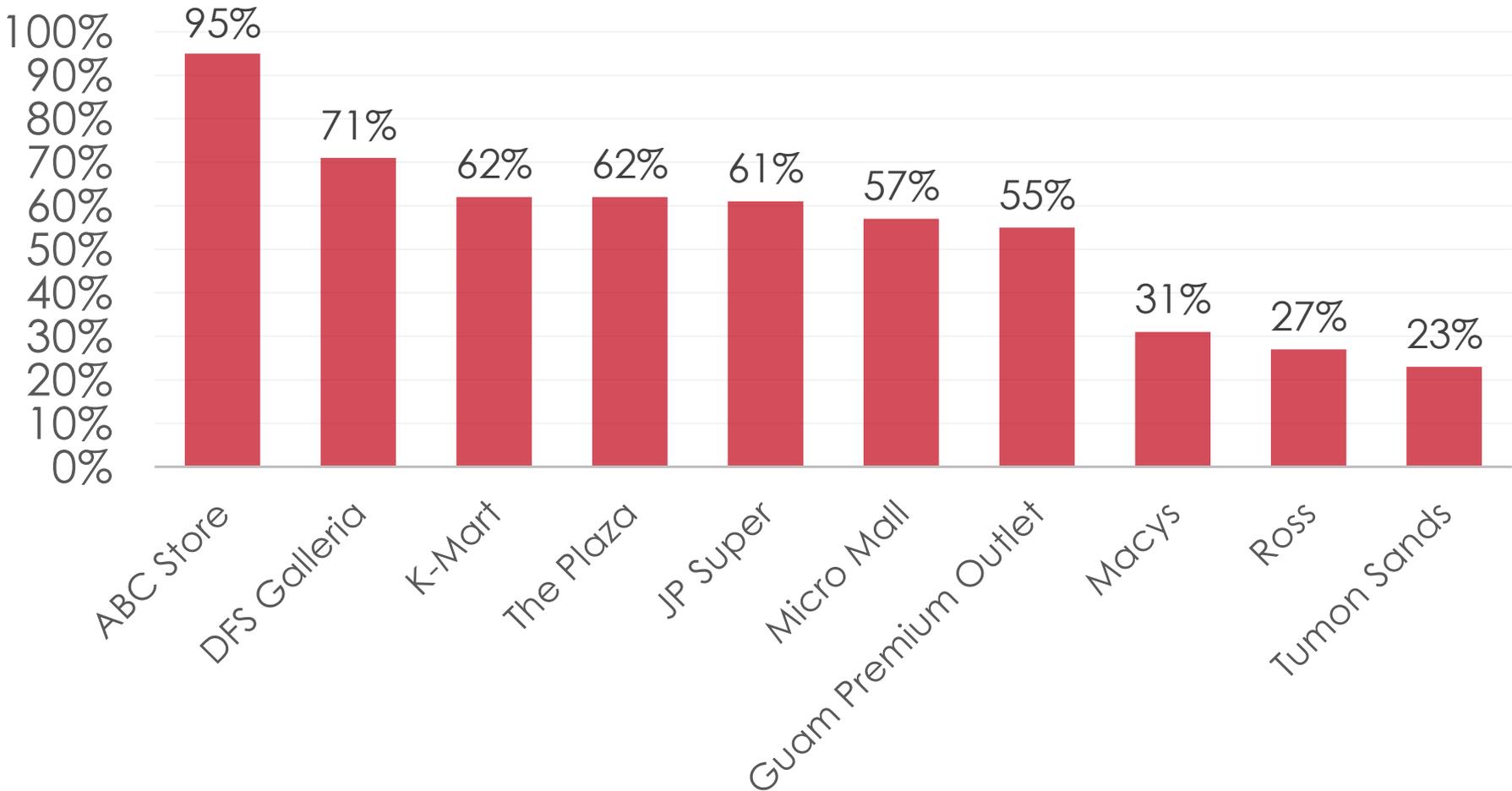
ACCOMMODATIONS – Satisfaction by Category



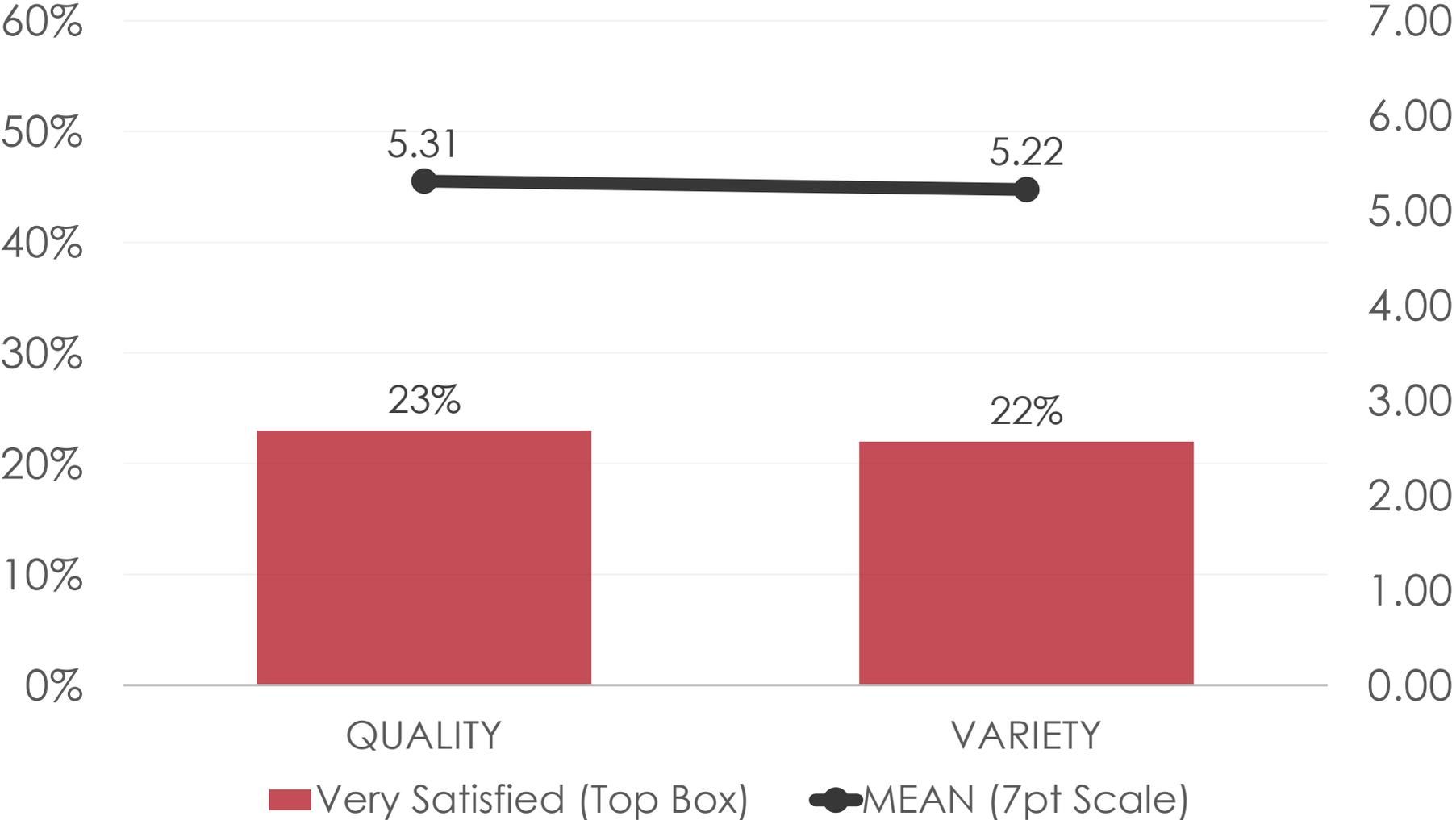
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



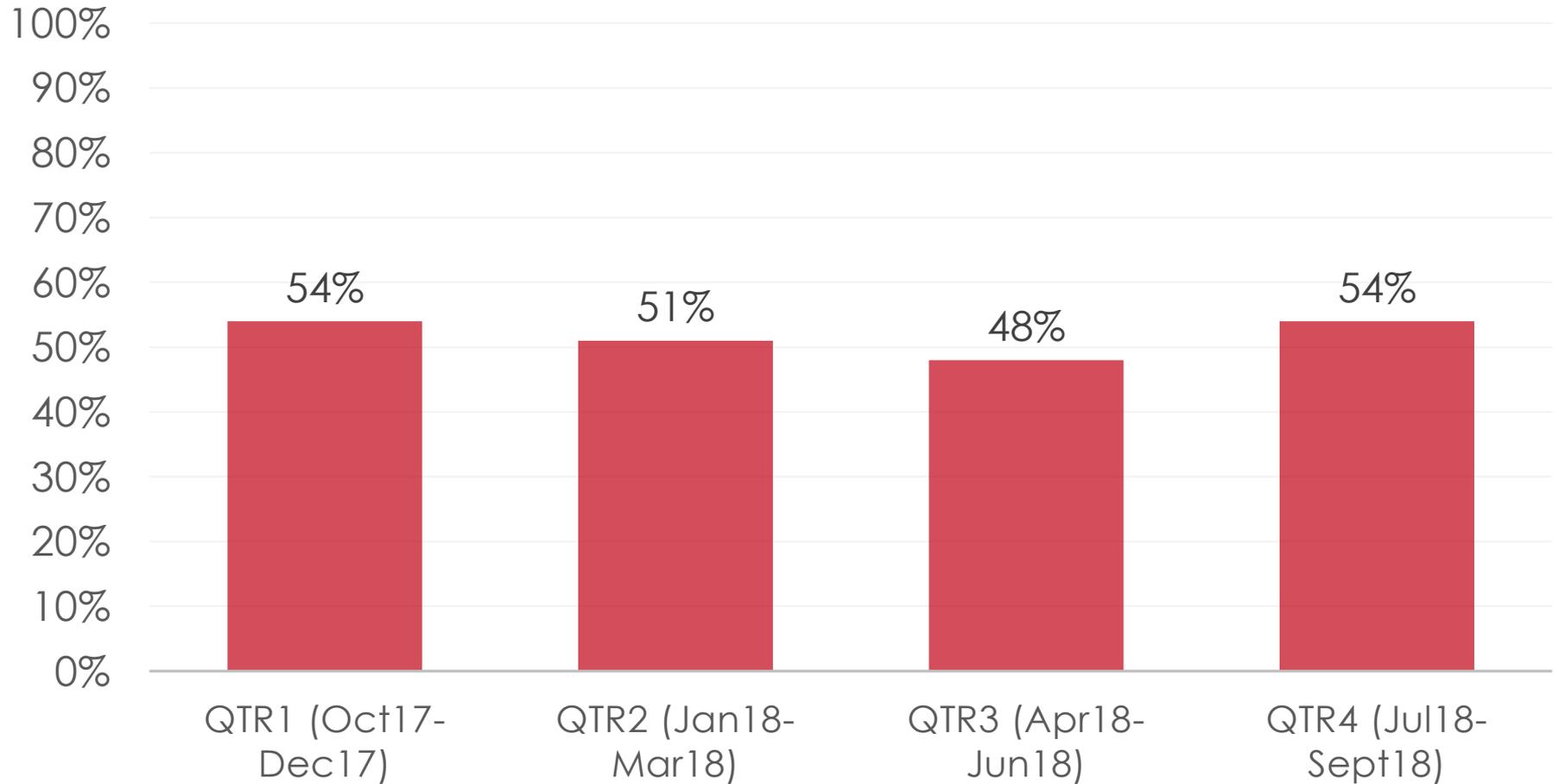
Shopping Malls/ Stores (Top Responses)



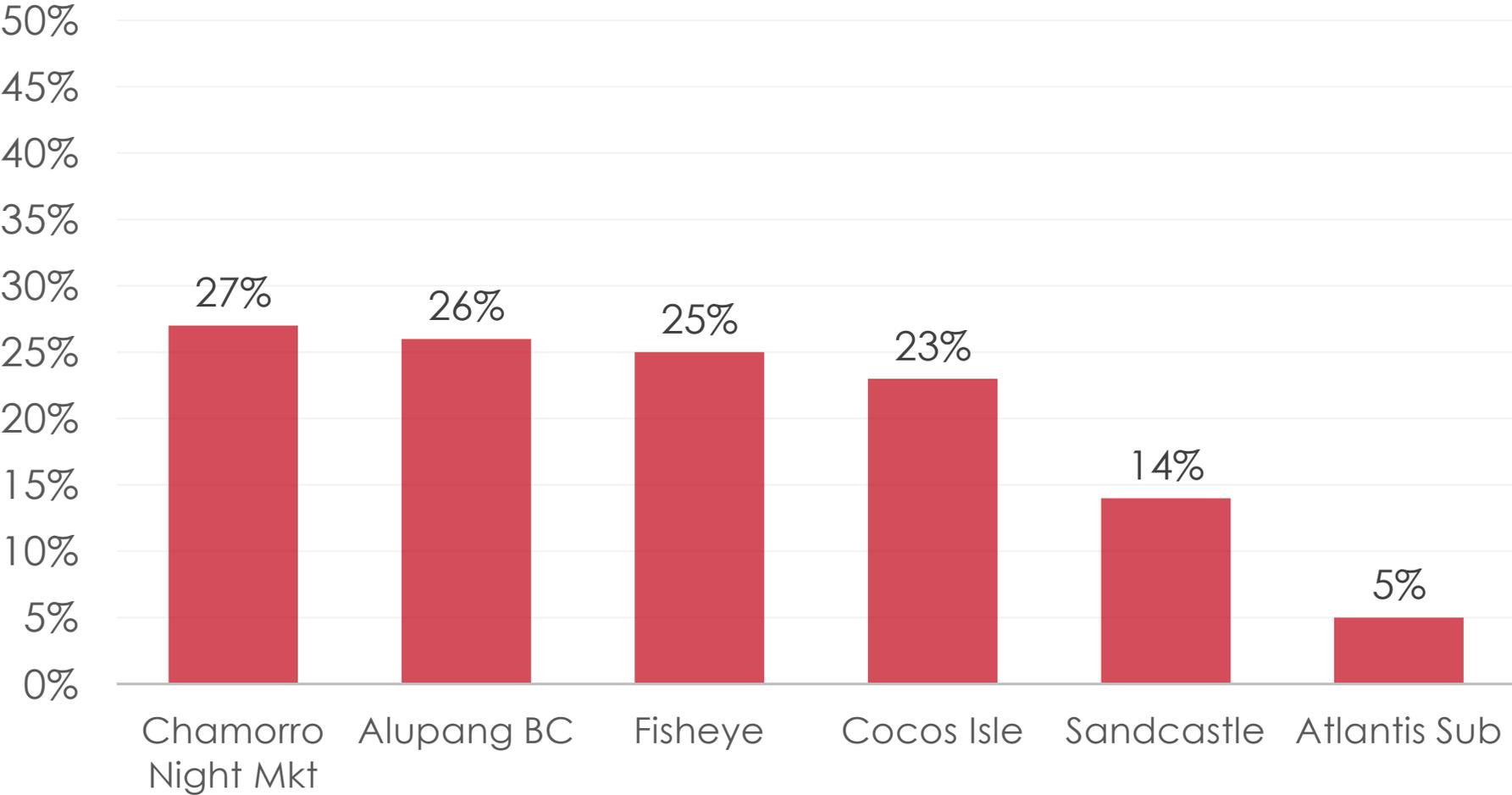
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2018 Tracking

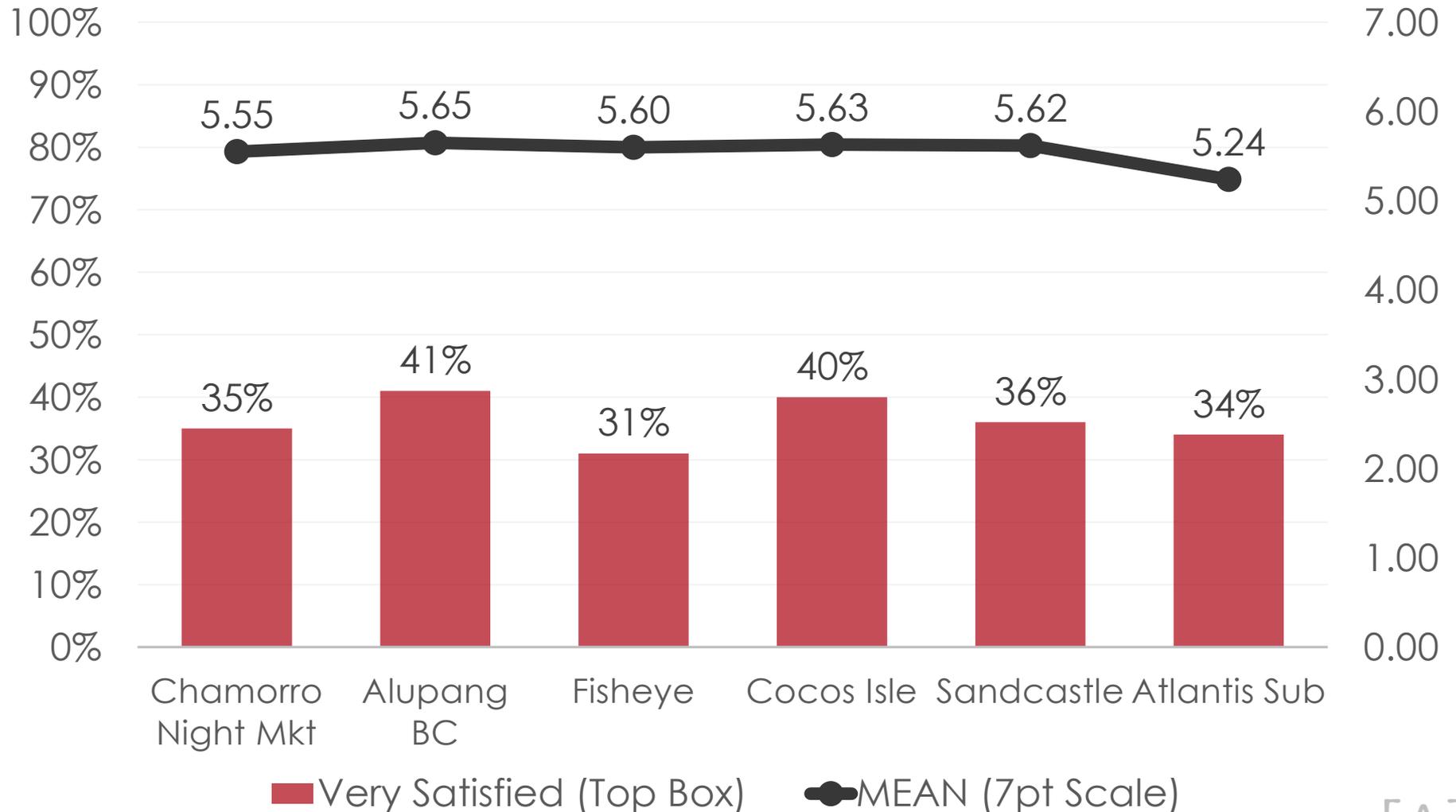


Optional Tour Participation (Top Responses/ 5%+)

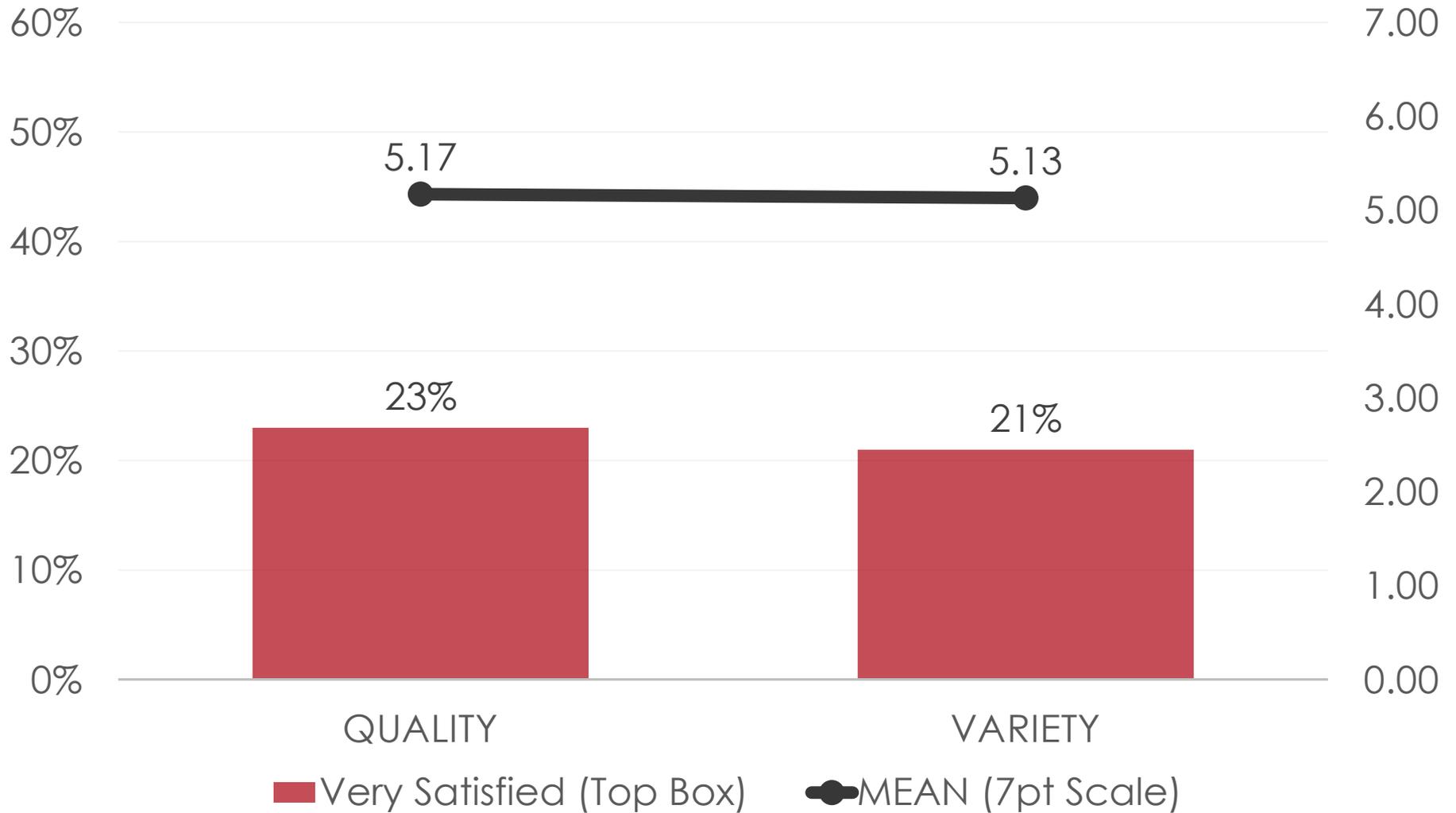


Optional Tour Satisfaction

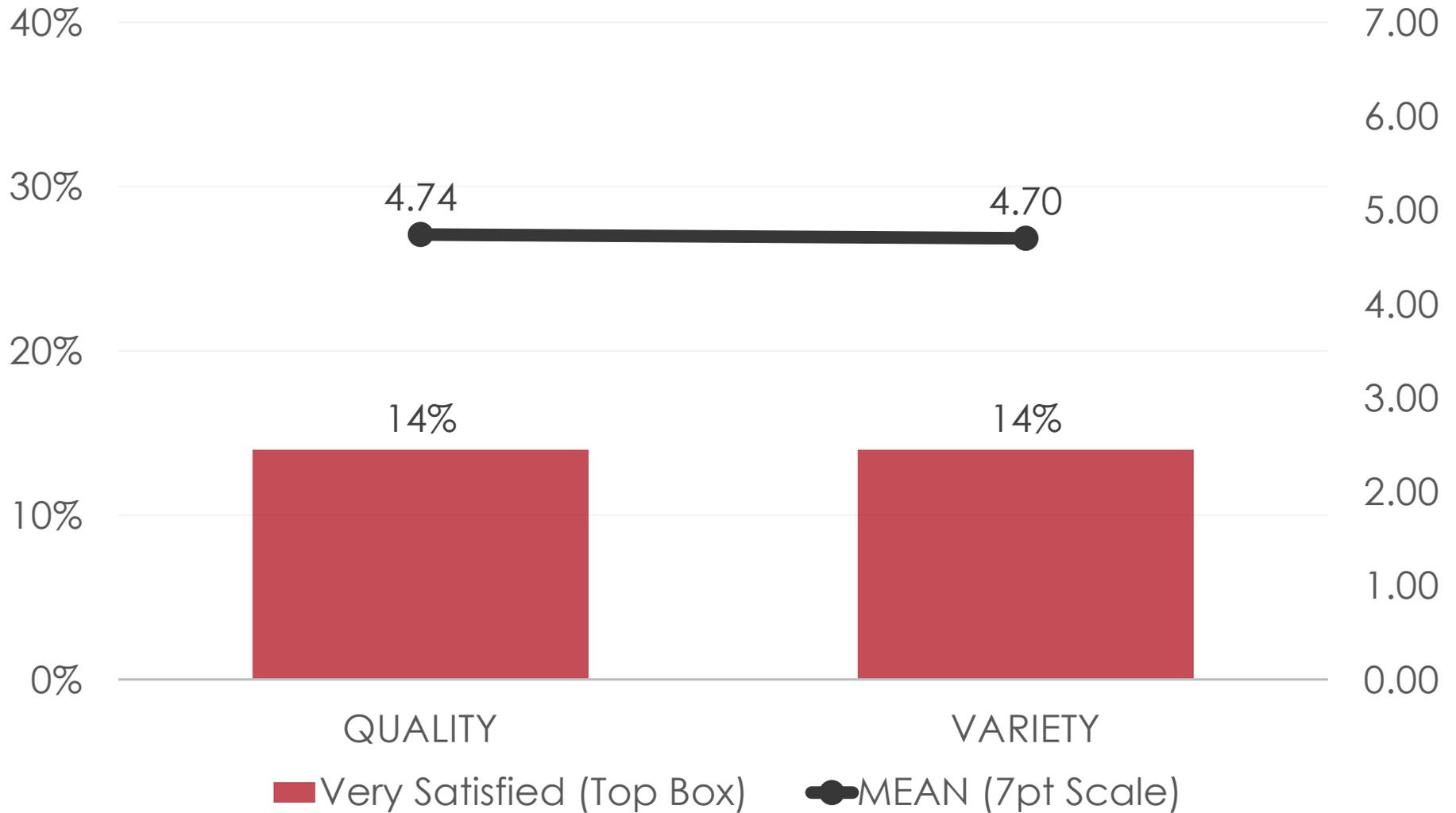
Top Responses only - Participation (5%+)



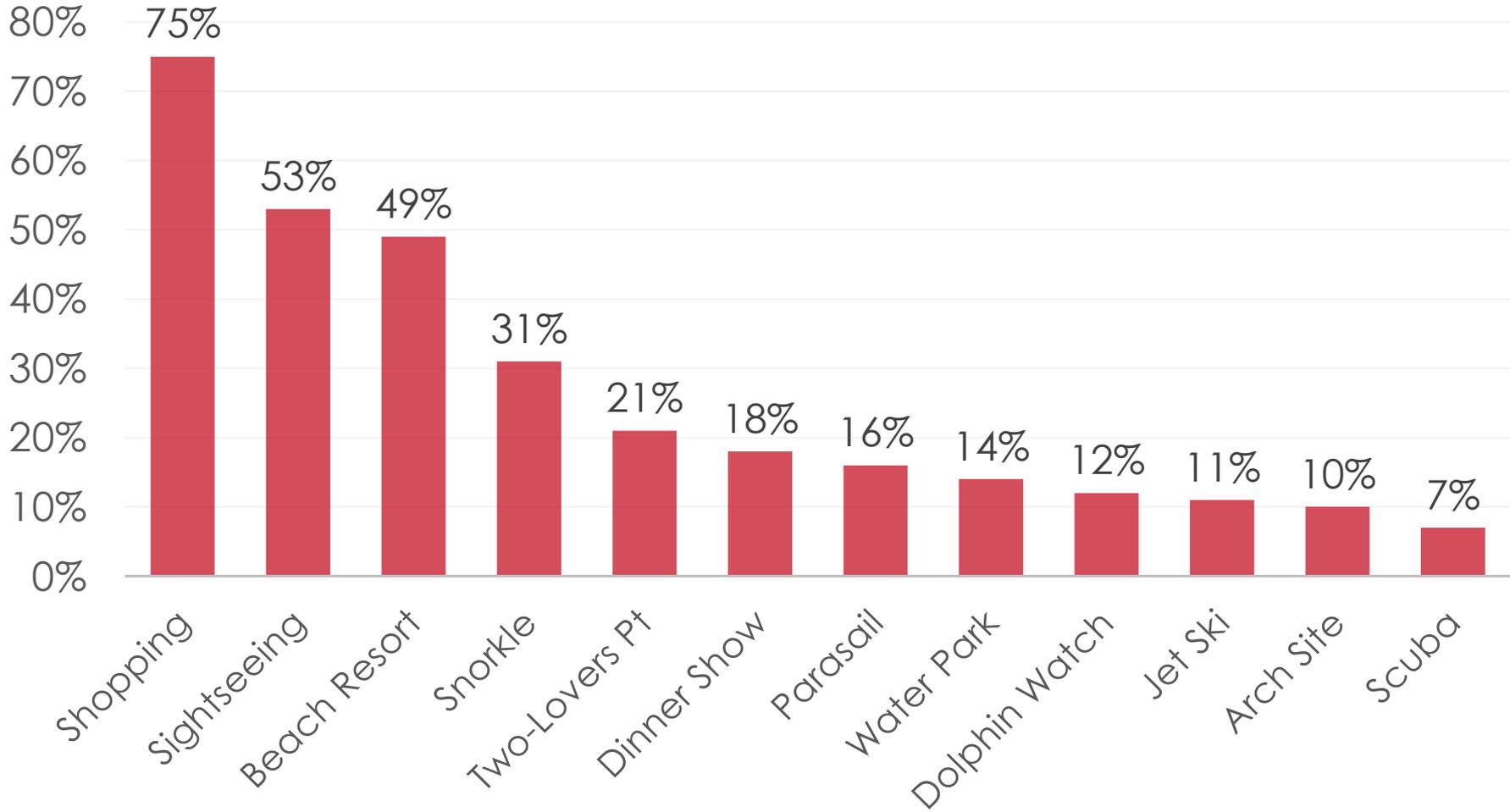
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

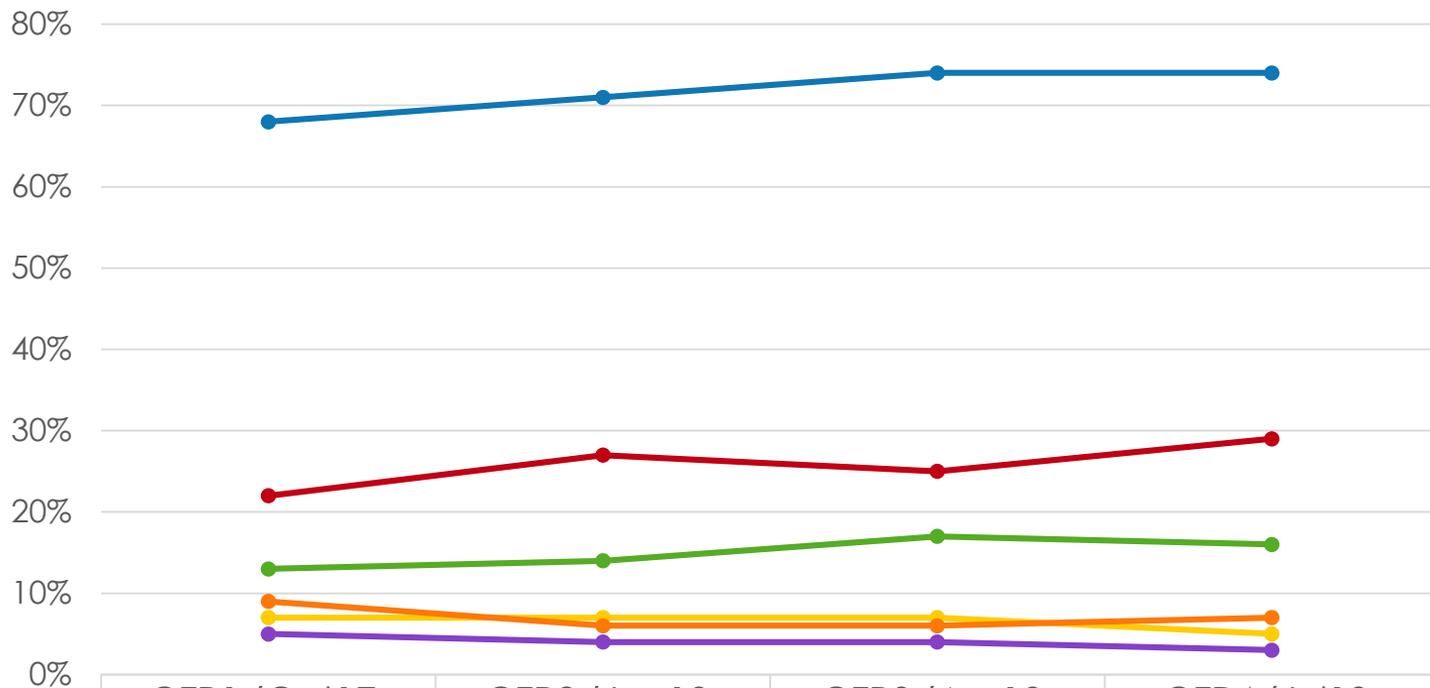


Activities Participation (Top Responses)



SECTION 5 PROMOTIONS

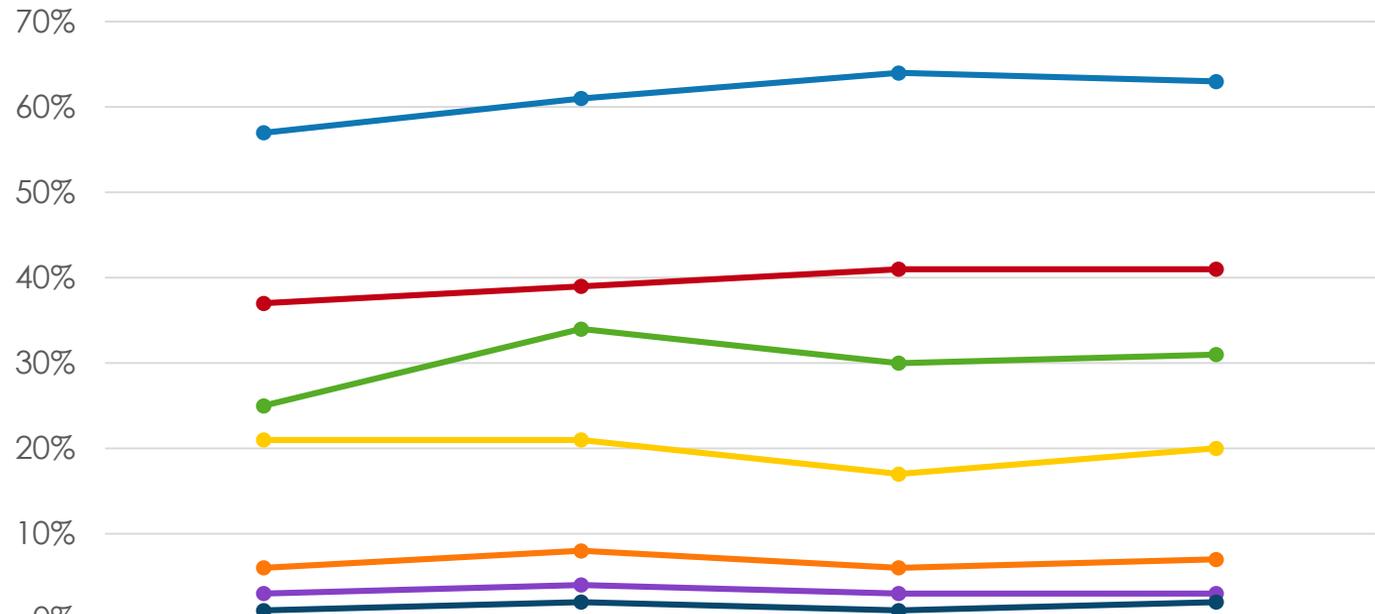
INTERNET- GUAM SOURCES OF INFORMATION



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
Search engines	68%	71%	74%	74%
Social network	22%	27%	25%	29%
Blog/ Vlog	13%	14%	17%	16%
Forums	7%	7%	7%	5%
Q&A site	5%	4%	4%	3%
Do NOT use	9%	6%	6%	7%

INTERNET- SOURCES OF INFORMATION

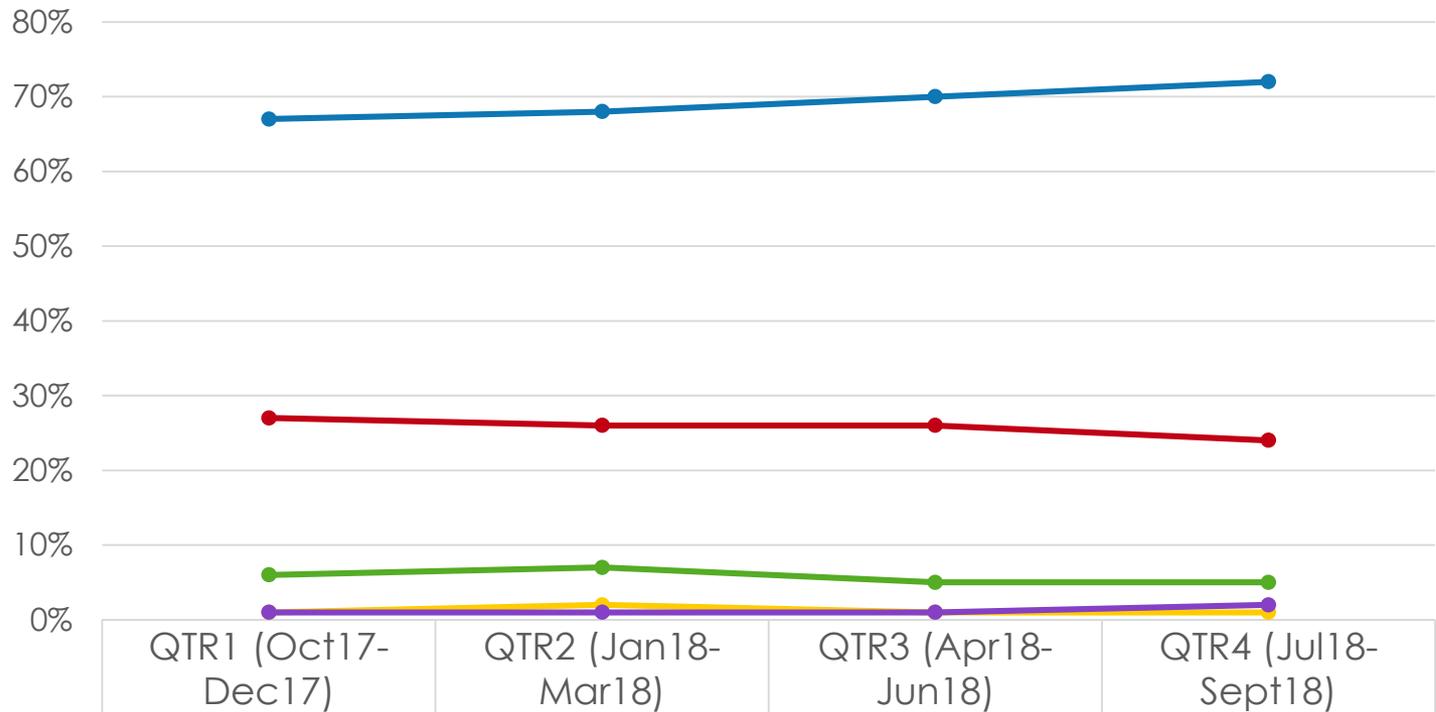
Things to do on Guam



	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
Google	57%	61%	64%	63%
Yahoo	37%	39%	41%	41%
Instagram	25%	34%	30%	31%
Online Booking Site	21%	21%	17%	20%
Facebook	3%	4%	3%	3%
Twitter	6%	8%	6%	7%
Other	1%	2%	1%	2%

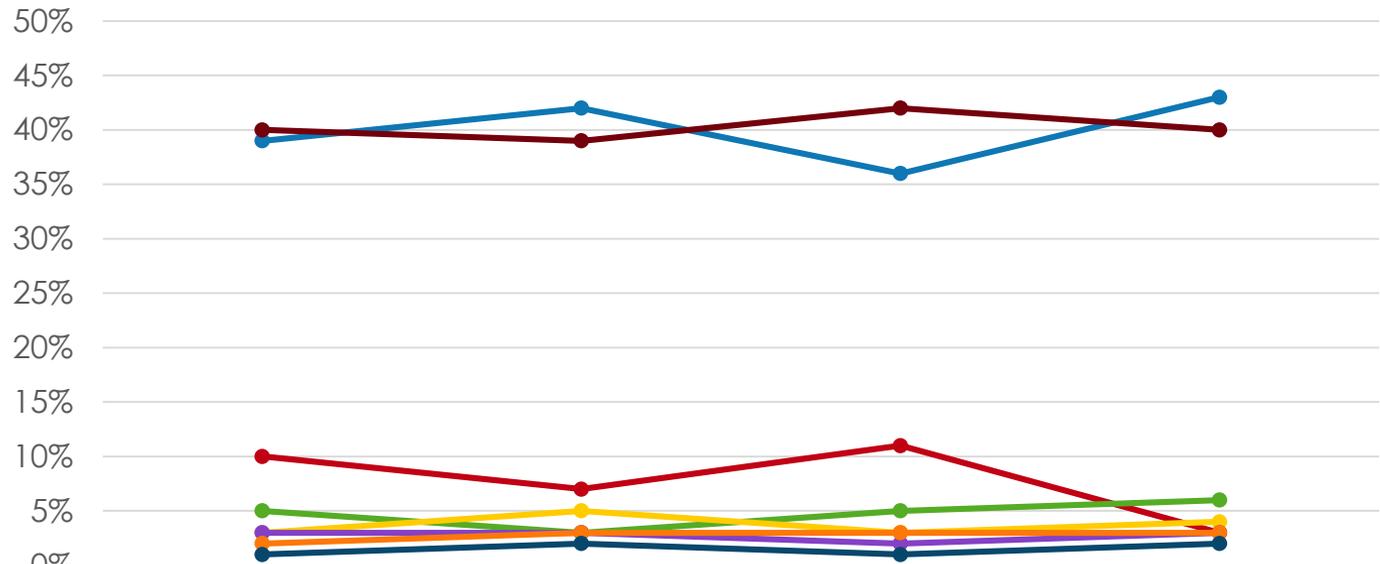
INTERNET- SOURCES OF INFORMATION

GVB



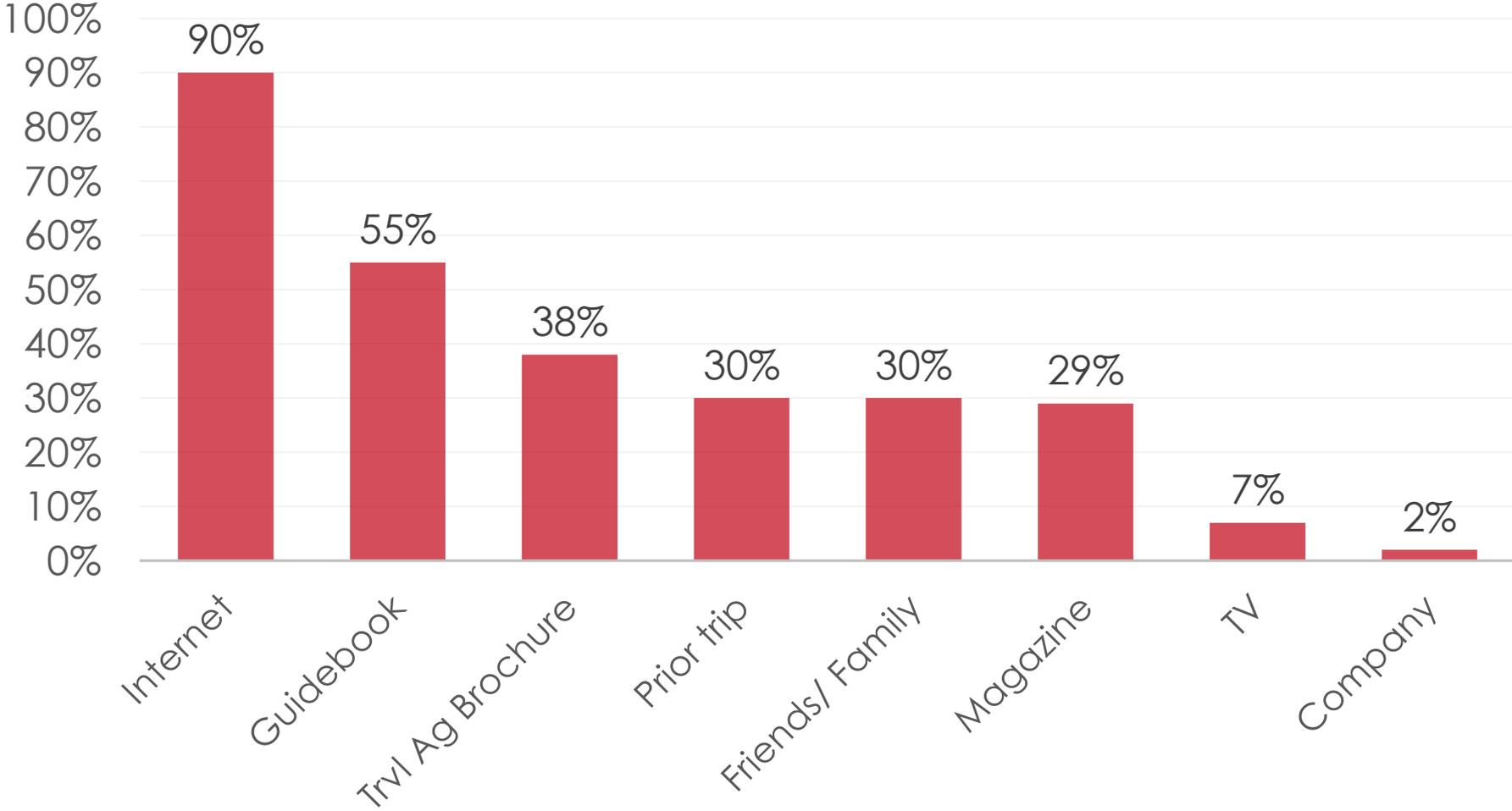
	QTR1 (Oct17- Dec17)	QTR2 (Jan18- Mar18)	QTR3 (Apr18- Jun18)	QTR4 (Jul18- Sept18)
None	67%	68%	70%	72%
GVB Website	27%	26%	26%	24%
GVB Instagram	6%	7%	5%	5%
GVB Twitter	1%	2%	1%	1%
GVB Facebook'	1%	1%	1%	2%

TRAVEL MOTIVATION



	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Friends/ Family	39%	42%	36%	43%
Company/ Bus Trip	10%	7%	11%	3%
Internet	5%	3%	5%	6%
Travel Show	3%	5%	3%	4%
Travel Agent	3%	3%	2%	3%
Print	2%	3%	3%	3%
Social Media	1%	2%	1%	2%
None	40%	39%	42%	40%

PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

GVB EXIT SURVEY

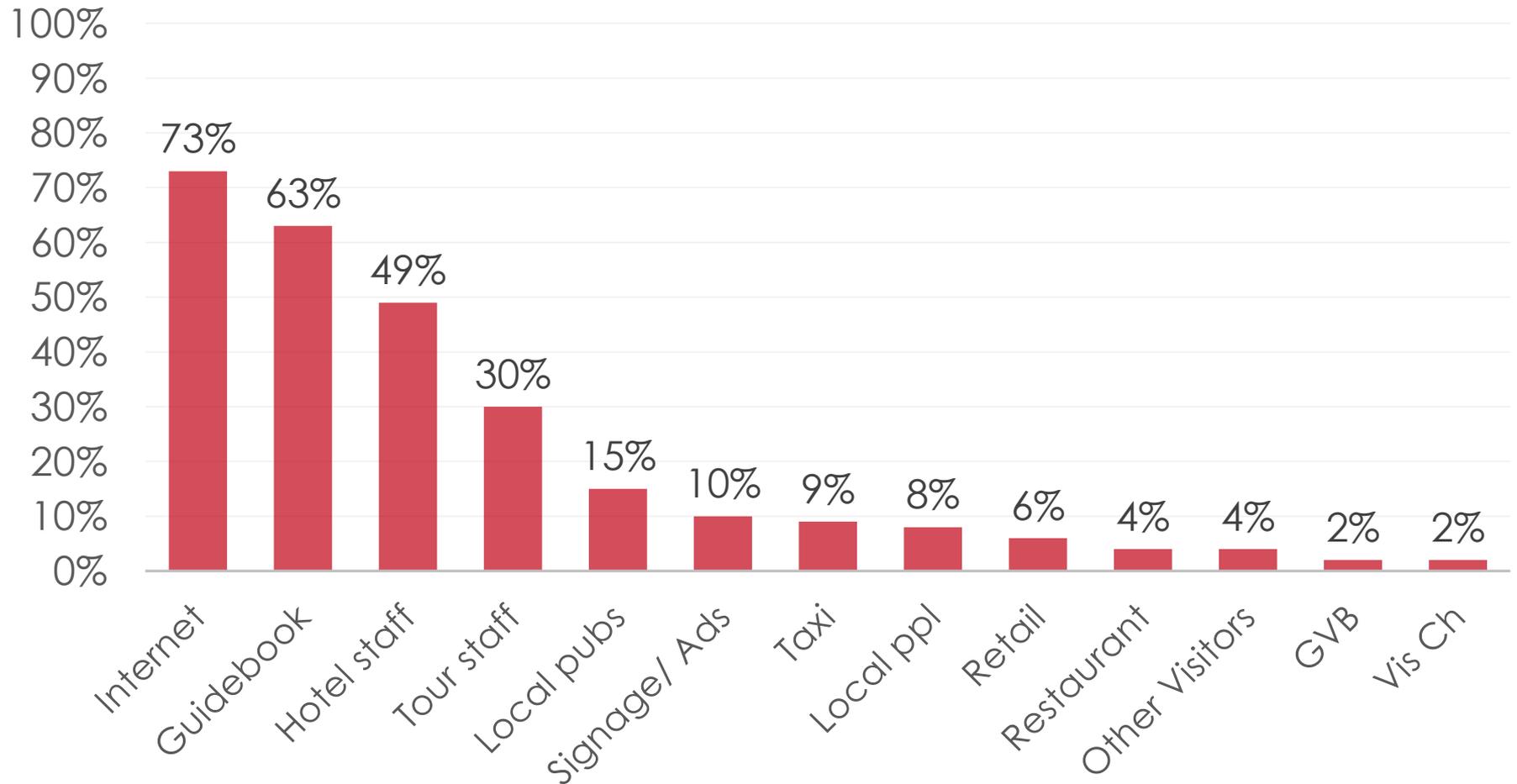
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q1	Internet/Mobile App	90%	91%	90%	92%	88%	83%	85%	88%
	Travel guide book at bookstores	55%	52%	45%	59%	38%	17%	56%	49%
	Travel agent brochure	38%	39%	28%	28%	19%		59%	37%
	I have been to Guam before	30%	36%	61%	38%	44%	67%	26%	34%
	Friend or relative	30%	25%	22%	26%	25%	17%	26%	26%
	Magazine (consumer)	29%	31%	26%	26%	25%	17%	41%	33%
	TV	7%	6%	6%	7%	6%		7%	6%
	Co-worker/ company travel department	2%	1%	2%	2%		33%		7%
	Consumer travel shows	2%	1%	1%	2%				0%
	Guam Visitors Bureau promotional activities	1%	2%	2%	2%				0%
	Guam Visitors Bureau office	1%	2%	2%	2%		17%		2%
	Newspaper	1%	1%	1%	1%				1%
	Travel trade shows	0%	0%	1%		6%			1%
	Radio	0%							0%
	Theater ads	0%	0%	0%					0%
	Total	1087	618	539	167	16	6	27	213

Prepared by Anthology Research

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

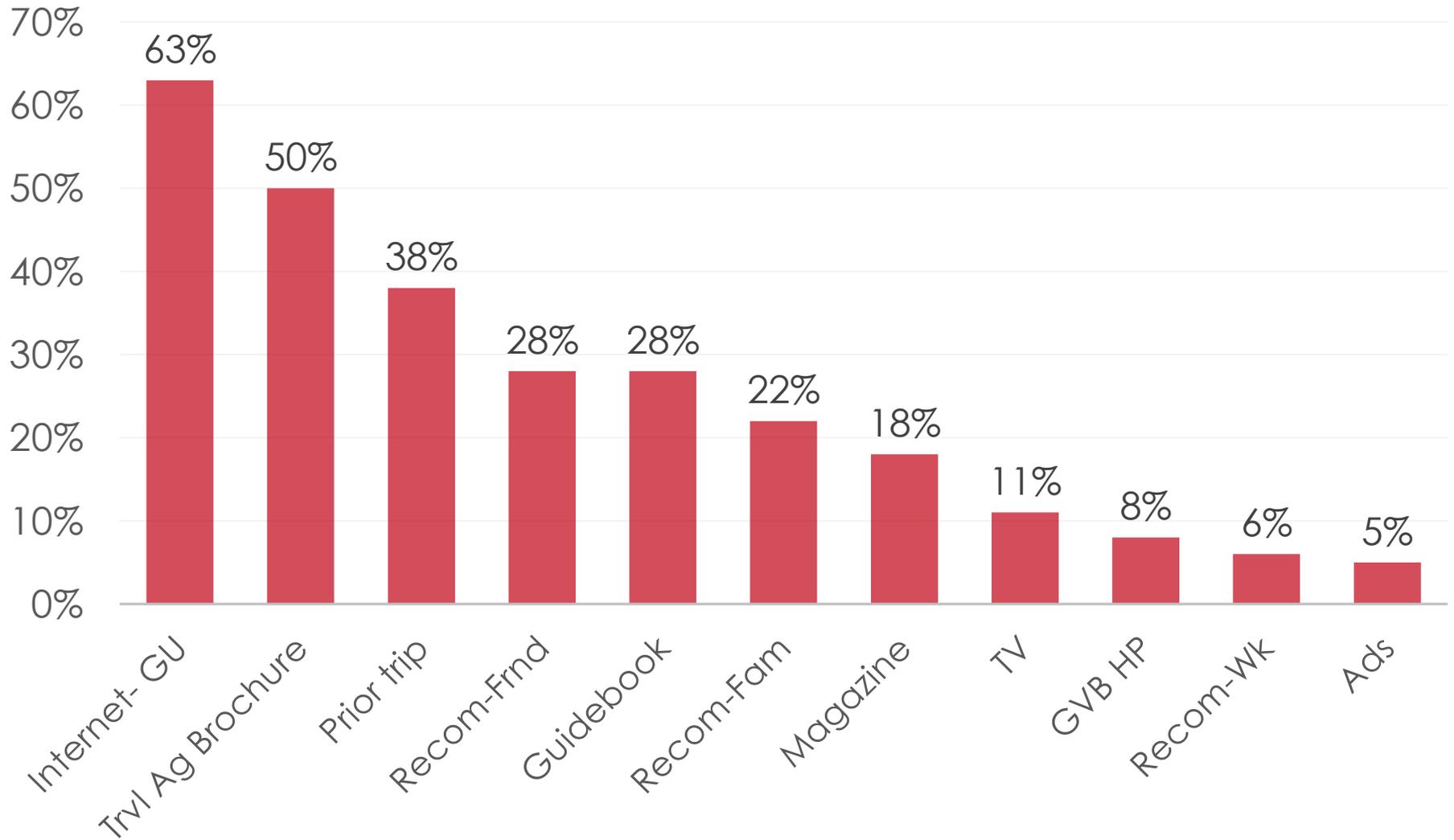
GVB EXIT SURVEY

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

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q2	Internet/Mobile App	73%	75%	72%	76%	31%	67%	74%	67%
	Guide books I brought with me	63%	64%	60%	67%	56%	33%	74%	60%
	Hotel staff	49%	50%	47%	43%	56%	50%	41%	38%
	Tour staff	30%	32%	28%	27%	31%	33%	59%	36%
	Local publication	15%	15%	20%	17%	25%	17%	7%	18%
	Signs/ advertisement	10%	9%	13%	9%	6%	17%		16%
	Taxi drivers	9%	7%	8%	5%	13%		11%	9%
	Local people	8%	5%	9%	7%		17%	4%	9%
	Retail staff	6%	5%	5%	3%	6%		4%	6%
	Restaurant staff (outside hotel)	4%	4%	4%	5%	6%	17%	4%	3%
	Other visitors	4%	3%	3%	2%	6%			5%
	Guam Visitors Bureau	2%	3%	4%	5%				4%
	Visitors channel	2%	2%	2%	2%			4%	3%
	Total	1089	619	539	168	16	6	27	214

SOURCES OF INFORMATION

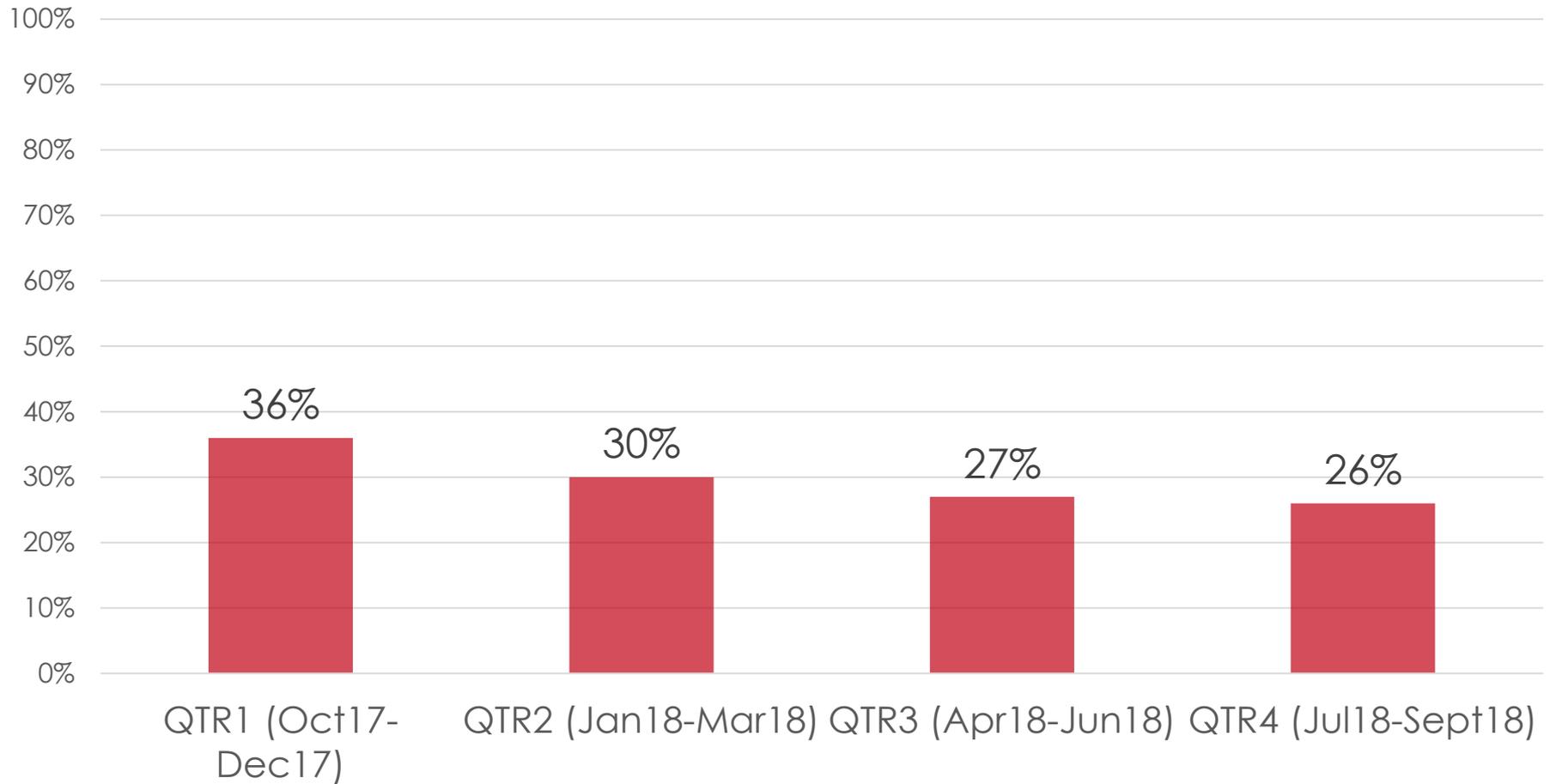
TRIP INFLUENCERS



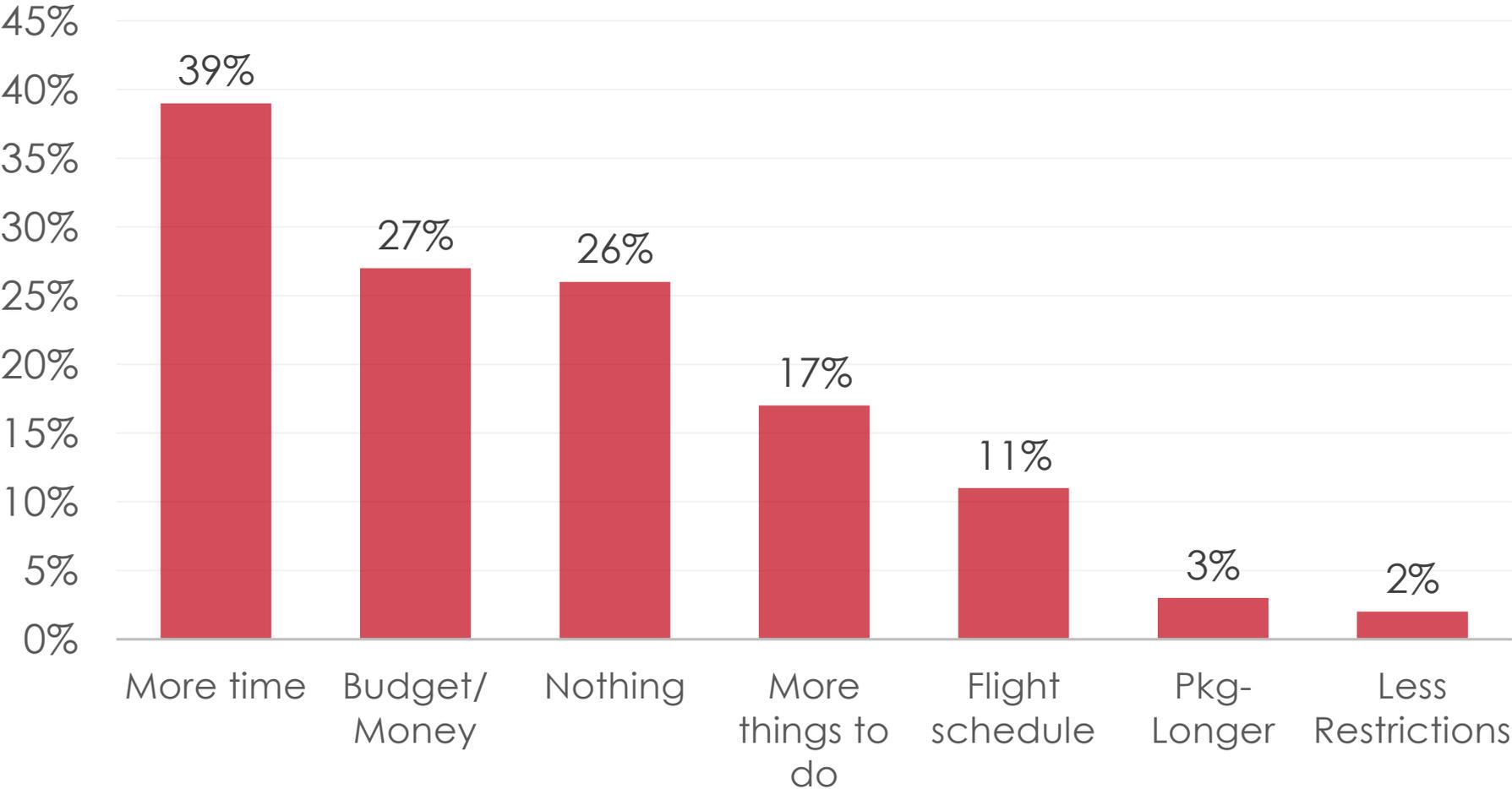
SECTION 6

FUTURE TRAVEL TO GUAM

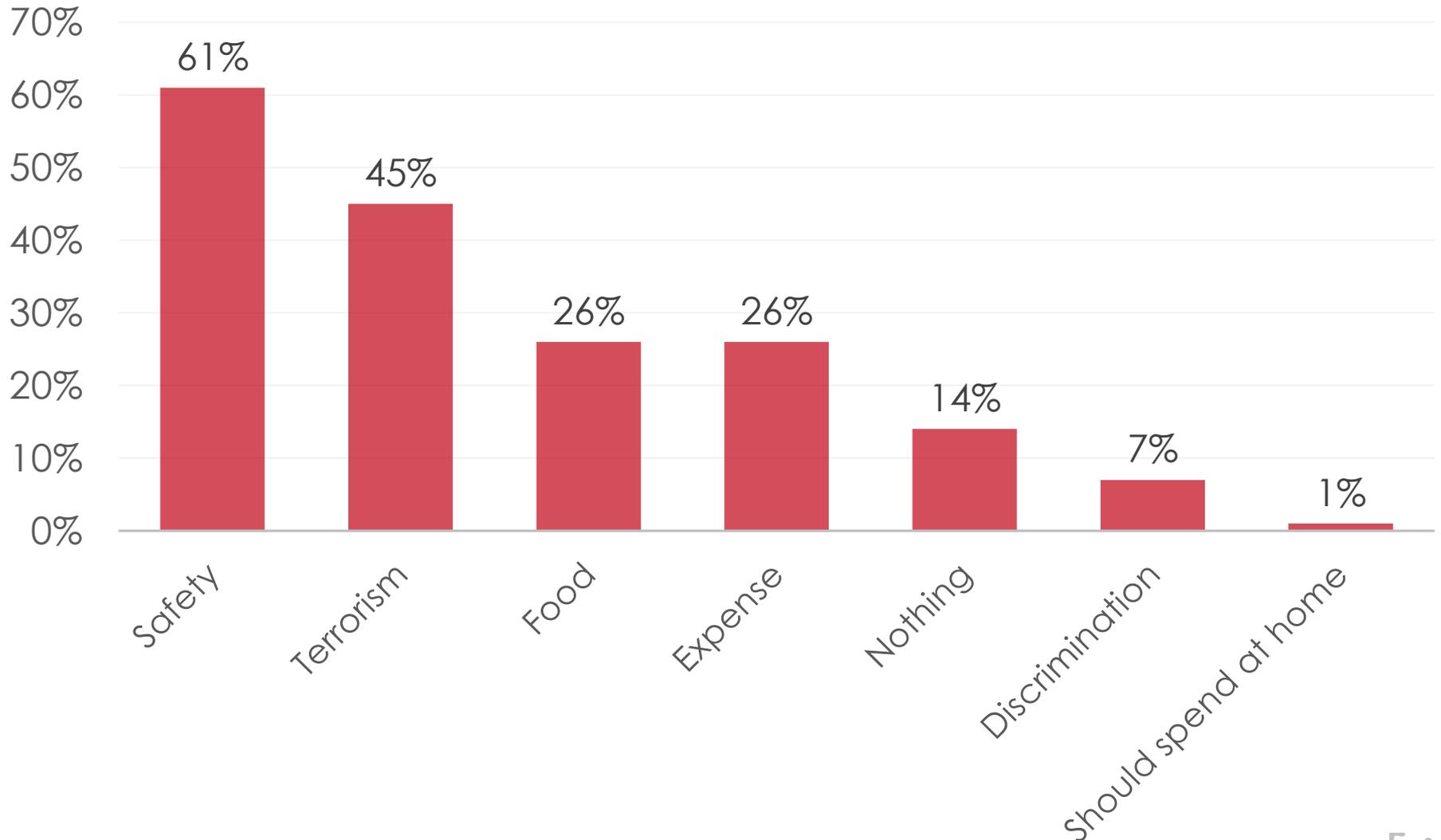
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



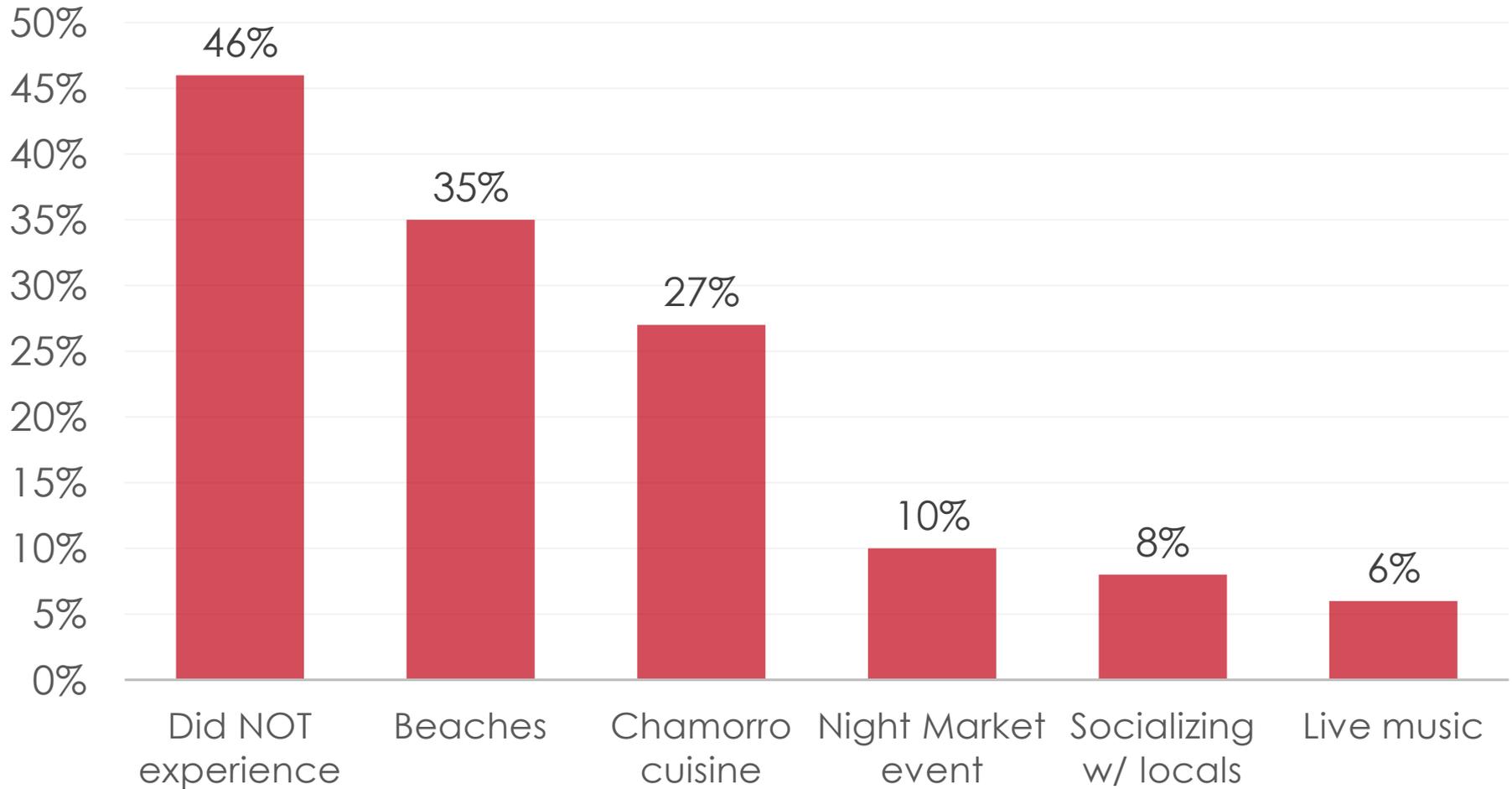
FUTURE TRAVEL CONCERNS



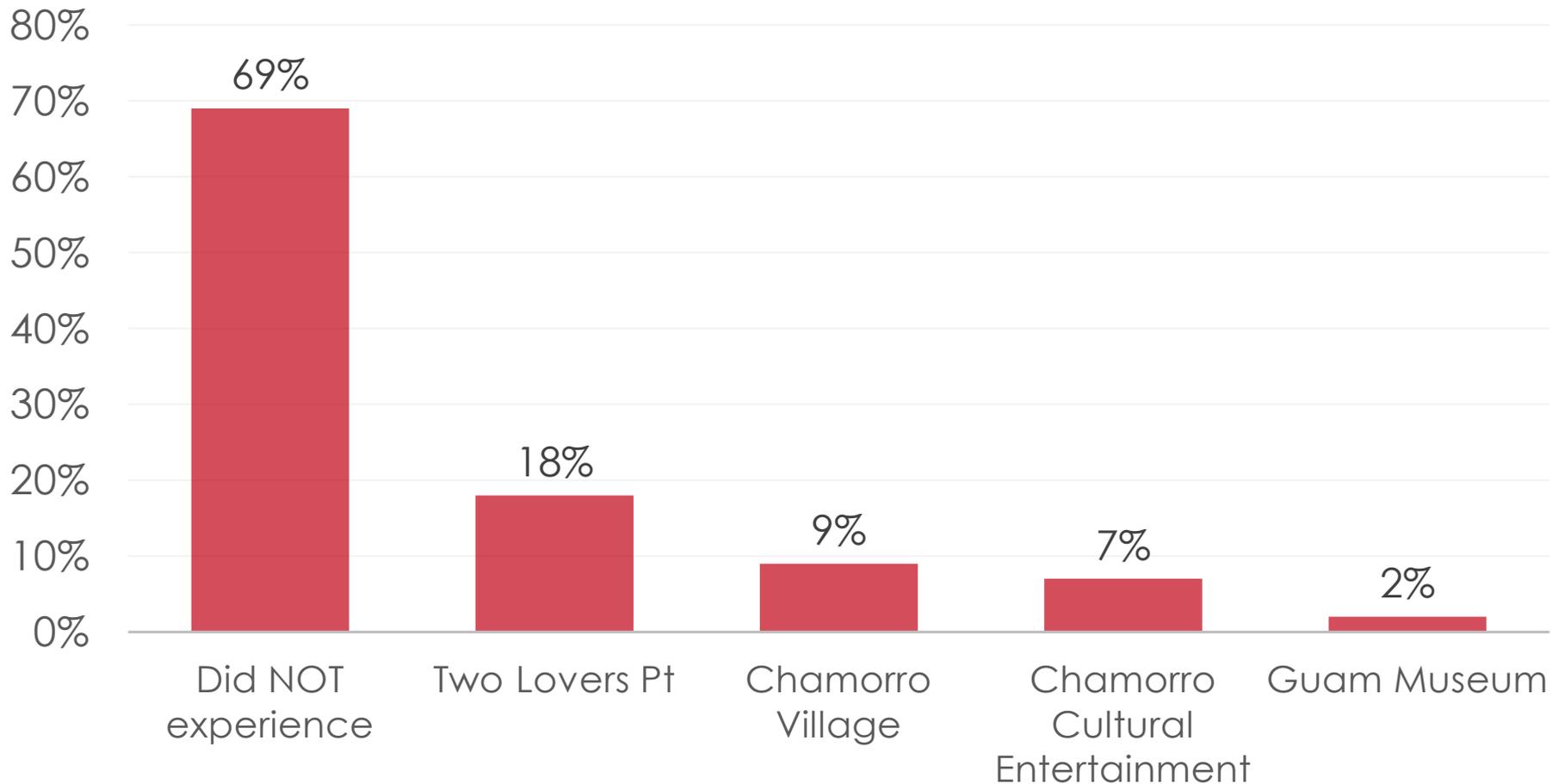
SECTION 7

GUAM CULTURE

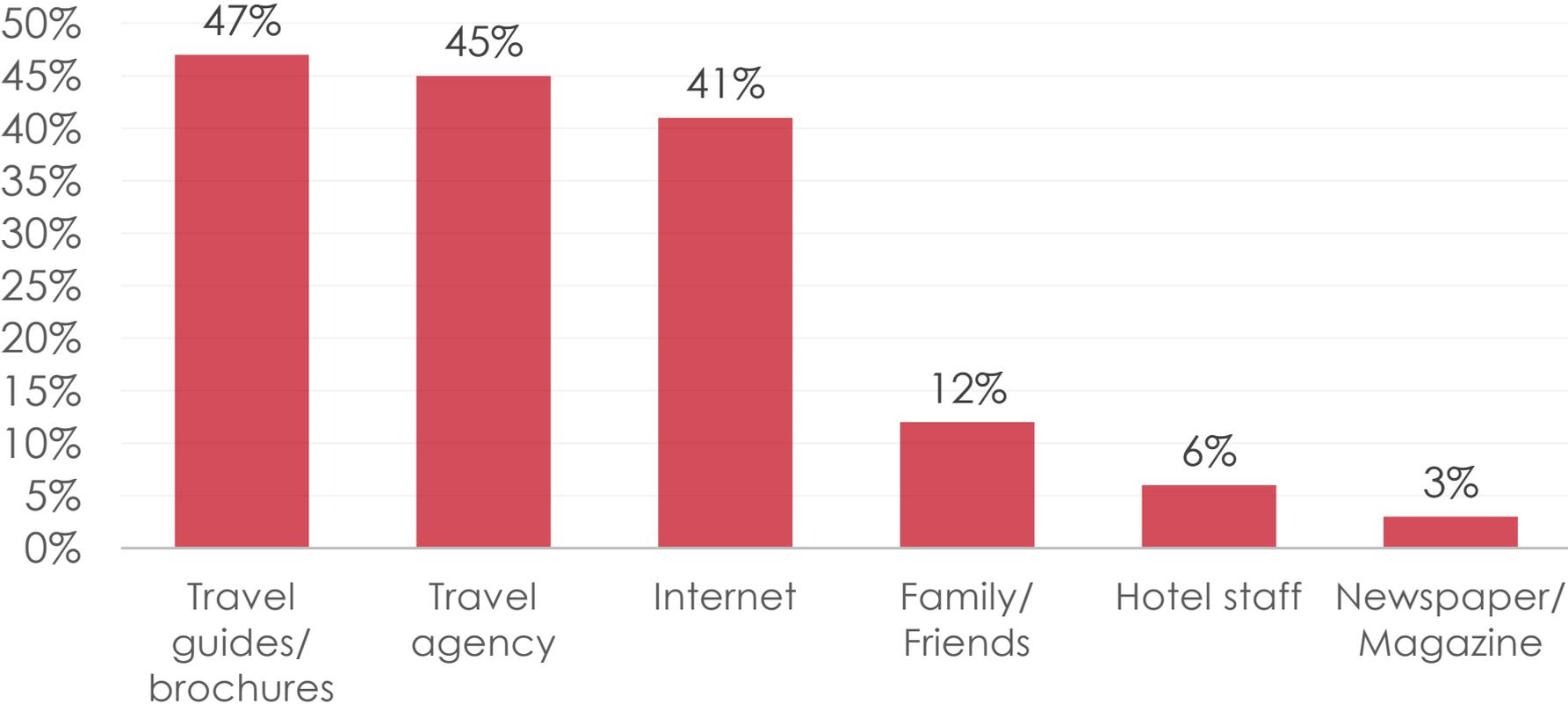
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



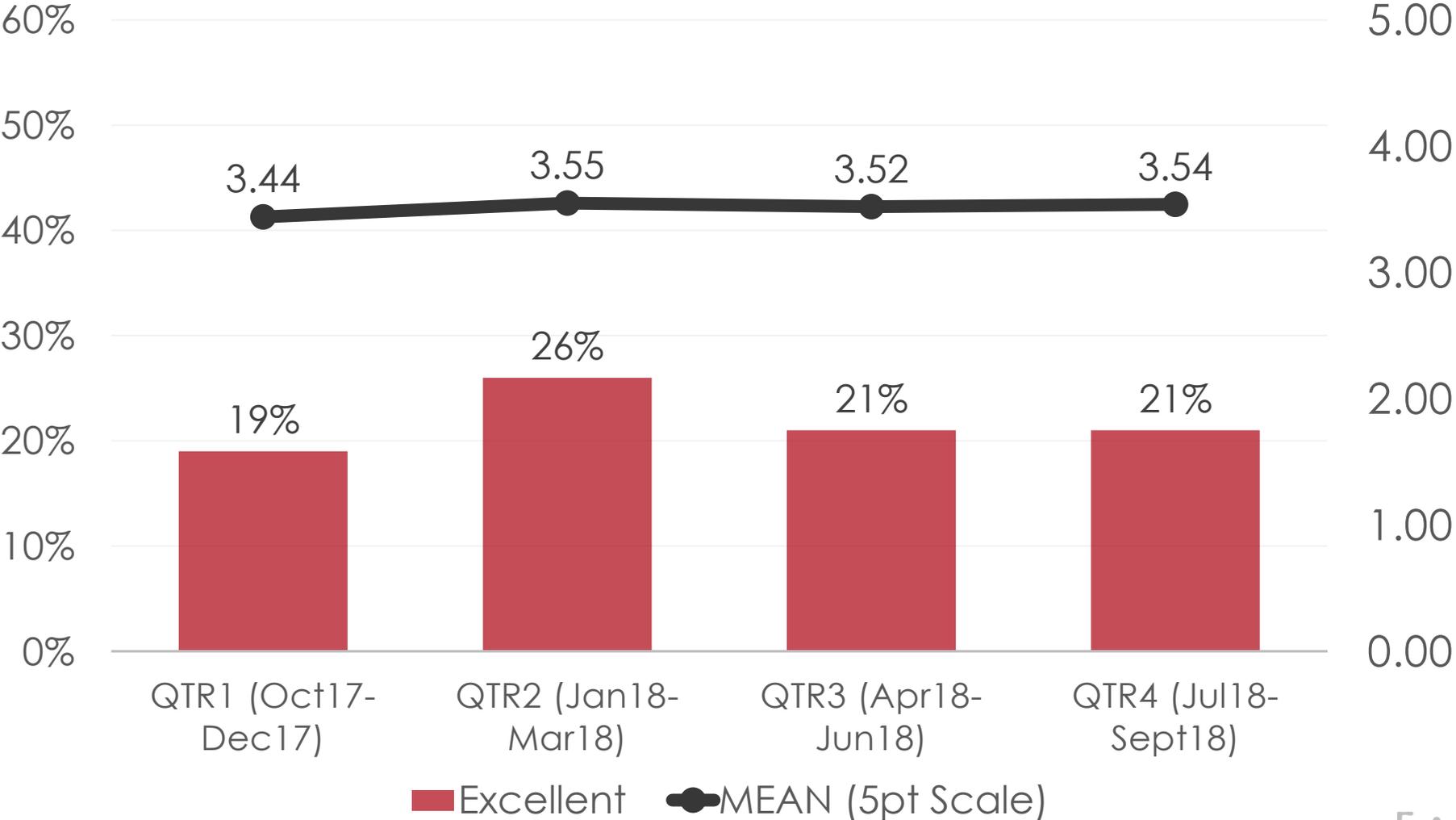
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



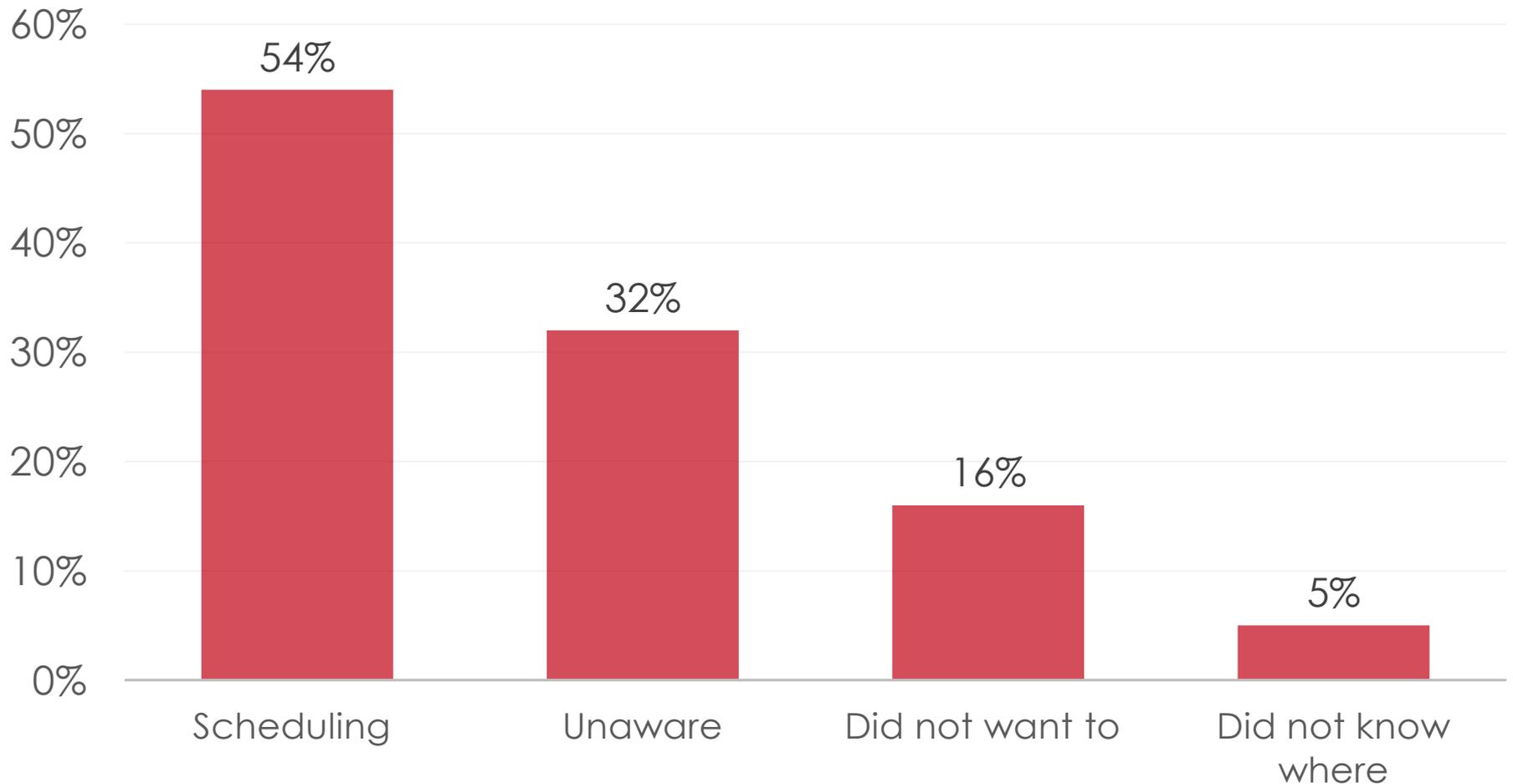
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



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, 2nd, 3rd and 4th Qtr 2018, and Overall 1-4 Qtr 2018					
	1st Qtr 2017	2nd Qtr 2018	3rd Qtr 2018	4th Qtr 2018	Combined 1-4th Qtr 2018
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	4	2	2	4	3
Ease of getting around					
Safety walking around at night					
Quality of daytime tours	6		4		5
Variety of daytime tours		4			
Quality of nighttime tours					
Variety of nighttime tours	8	7			7
Quality of shopping		3		3	
Variety of shopping	2				4
Price of things on Guam	7		6		
Quality of hotel accommodations	3	8	3	2	2
Quality/cleanliness of air, sky	5	5			6
Quality/cleanliness of parks					10
Quality of landscape in Tumon			5	1	9
Quality of landscape in Guam	1	1	1	5	1
Quality of ground handler		6	7		8
Quality/cleanliness of transportation vehicles					
% of Overall Satisfaction Accounted For	55.5%	60.4%	52.5%	44.5%	52.8%
NOTE: Only significant drivers are included.					

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the 4th Quarter FY2018 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality of hotel accommodations,**
 - **Quality of shopping,**
 - **Quality & cleanliness of beaches & parks, and**
 - **Quality of landscape in Guam.**
- With these factors the overall r^2 is .445 meaning that **44.5% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, 4th Qtr 2018 and Overall 1st, 2nd, 3rd and 4th Qtr 2018					
	1st Qtr 2017	2nd Qtr 2018	3rd Qtr 2018	4th Qtr 2018	Combined 1-4 Qtr 2018
Drivers:	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks					6
Ease of getting around					
Safety walking around at night		3			
Quality of daytime tours					
Variety of daytime tours	4		5		
Quality of nighttime tours					
Variety of nighttime tours	2			1	2
Quality of shopping	1	1		2	1
Variety of shopping	3				
Price of things on Guam			1		4
Quality of hotel accommodations			2		
Quality/cleanliness of air, sky					
Quality/cleanliness of parks					
Quality of landscape in Tumon					5
Quality of landscape in Guam					
Quality of ground handler	5		3		
Quality/cleanliness of transportation vehicles		2	4		3
% of Per Person On Island Expenditures Accounted For	3.7%	1.5%	2.8%	1.0%	1.0%

NOTE: Only significant drivers are included.

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by two significant factors in the 4th Quarter FY2018 Period. By rank order they are:
 - **Variety of night time tours, and**
 - **Quality of shopping.**
- With these factors the overall r^2 is .010 meaning that **1.0% of per person on island expenditure is accounted for by these factors.**