Guam Visitors Bureau

Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2018

QTR.2 (JAN – MAR 2018)

Prepared by: Anthology Research

#instaGuam

[ANTHOLOGY]
AnthologyGroup.com

GUAM VISITORS BUREAU
SETBISION BISITAN GUÅHAN

GUAM

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 **1,058** 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 **1,058** is +/- 2.98 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 +/- 2.98 percentage points.

[A]

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.

[A]

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
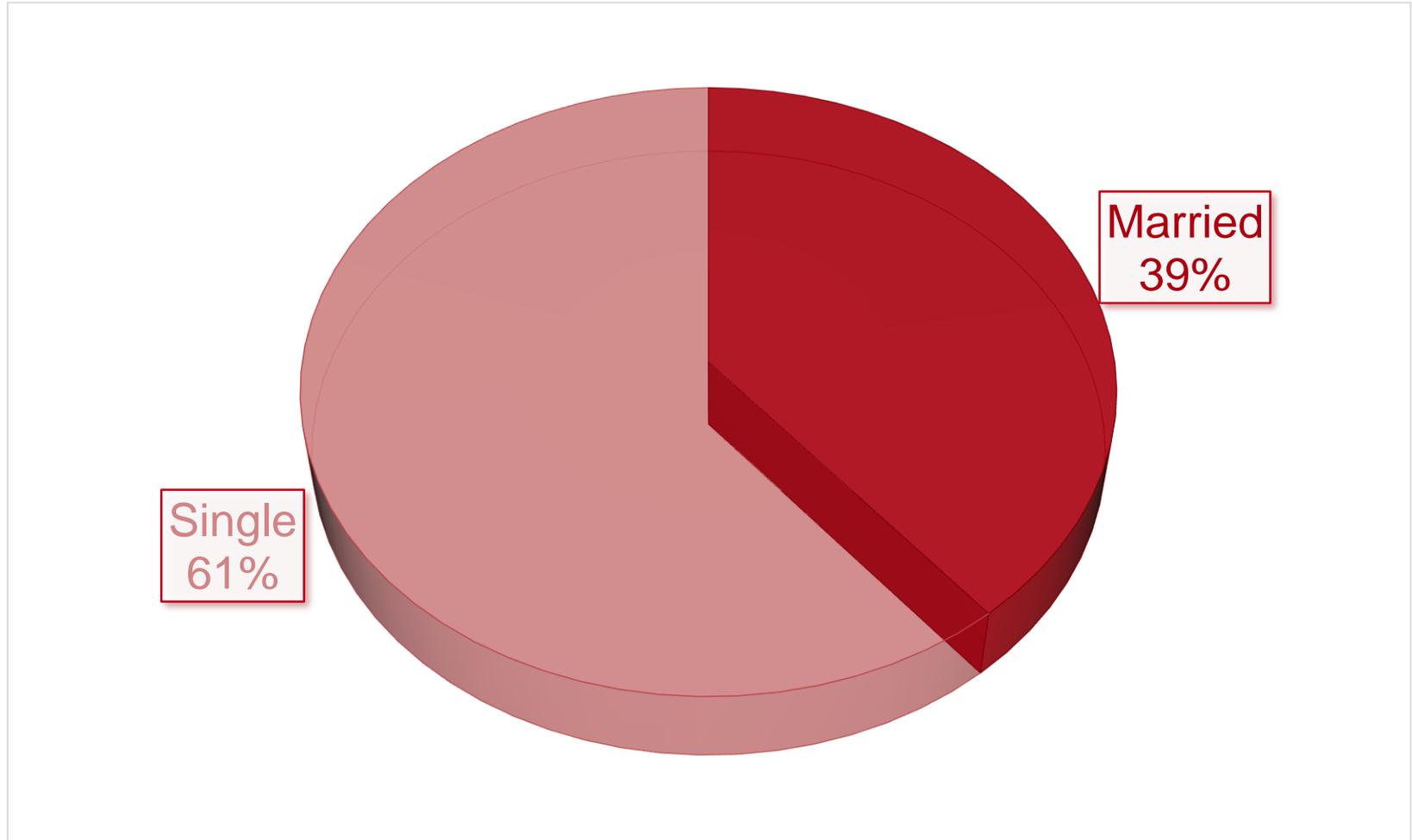
[A]

Key Highlighted Segments
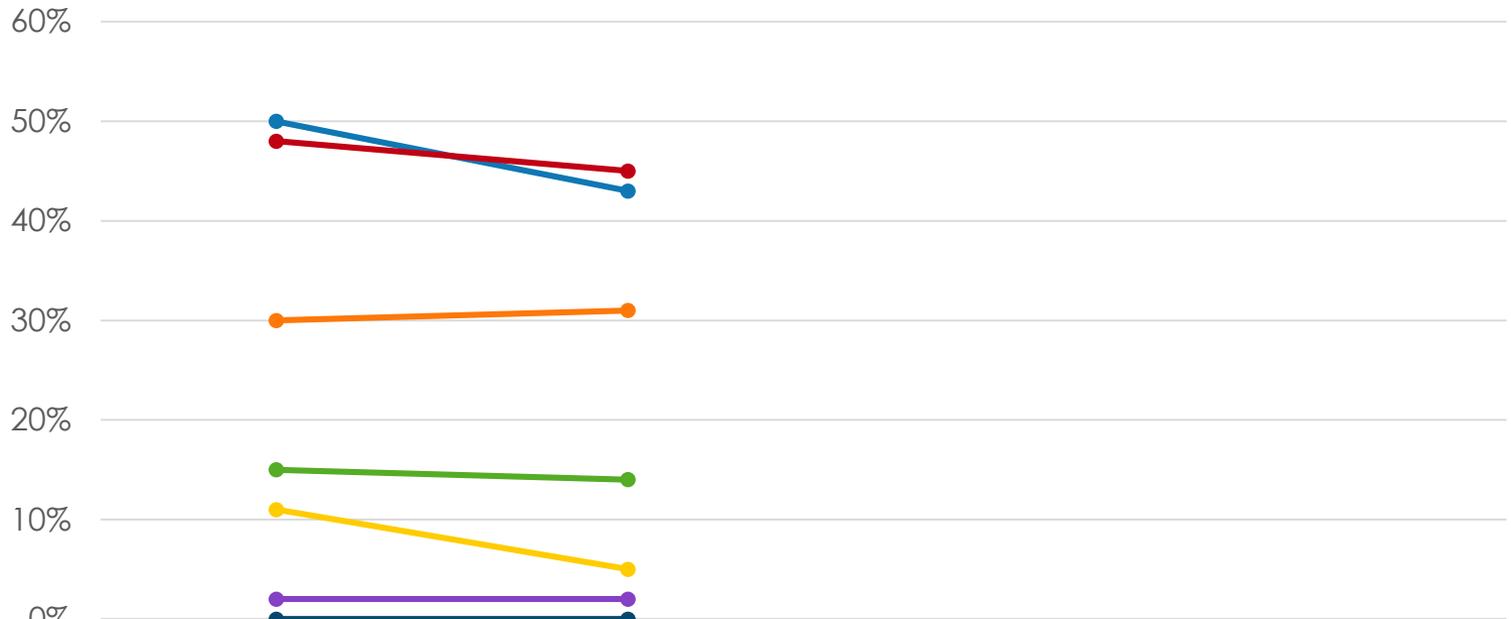
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Family	50%	43%		
Repeat	48%	45%		
Office Lady	15%	14%		
Wedding	11%	5%		
Silver	2%	2%		
Group	30%	31%		
MICE	0%	0%		

[A]

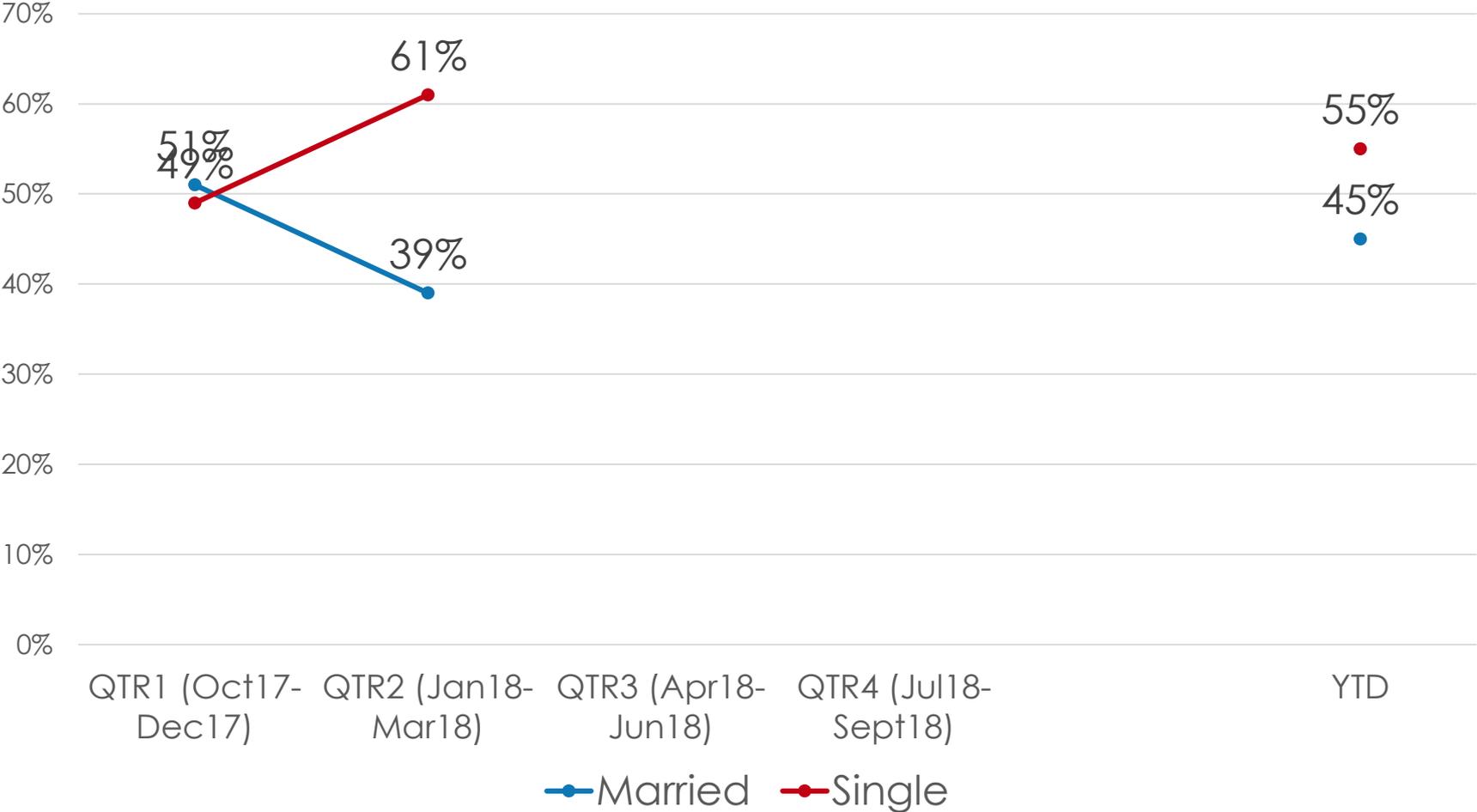# SECTION 1
PROFILE OF RESPONDENTS

[A]

Marital Status

[A]

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	39%	80%	51%	34%	100%	50%	73%	31%
	Single	61%	20%	49%	66%		50%	27%	69%
	Total	1058	453	478	144	17	4	51	324

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[A]

Age

MEAN = 31.32
MEDIAN = 28

[A]
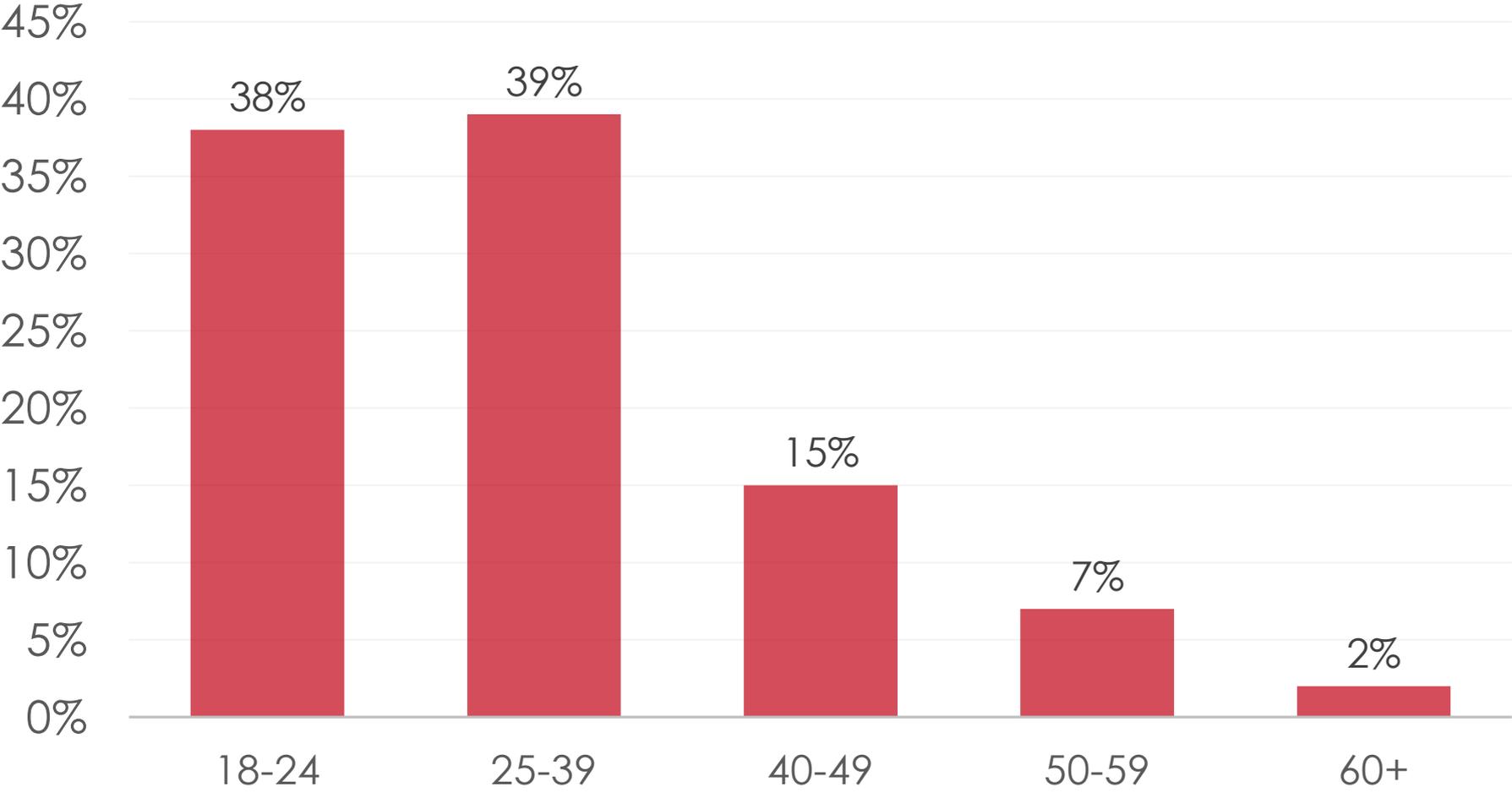
Age – FY2018 Tracking
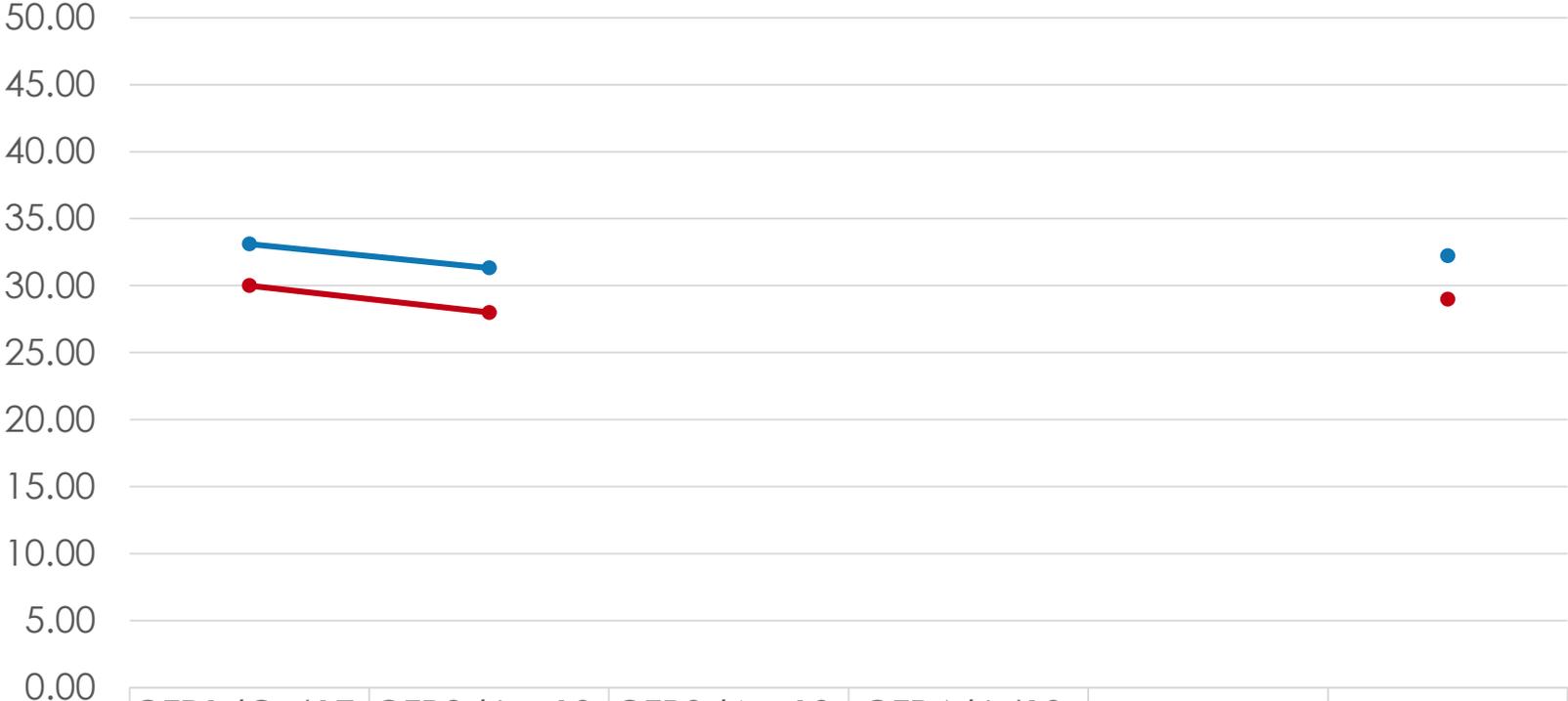
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	33.11	31.32				32.23
MEDIAN	30	28				29

[A]

Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
QF	18-24	38%	11%	20%	17%		25%	12%	38%
	25-39	39%	46%	42%	52%		50%	63%	40%
	40-49	15%	27%	23%	22%		25%	2%	15%
	50-59	7%	12%	12%	9%			24%	7%
	60+	2%	4%	3%		100%			1%
	Total	1058	453	478	144	17	4	51	324
QF	Mean	31.32	37.72	35.97	34.26	64.65	33.00	35.31	31.31
	Median	28	37	35	32	62	32	32	29

Prepared by Anthology Research

[A]

Annual Household Income
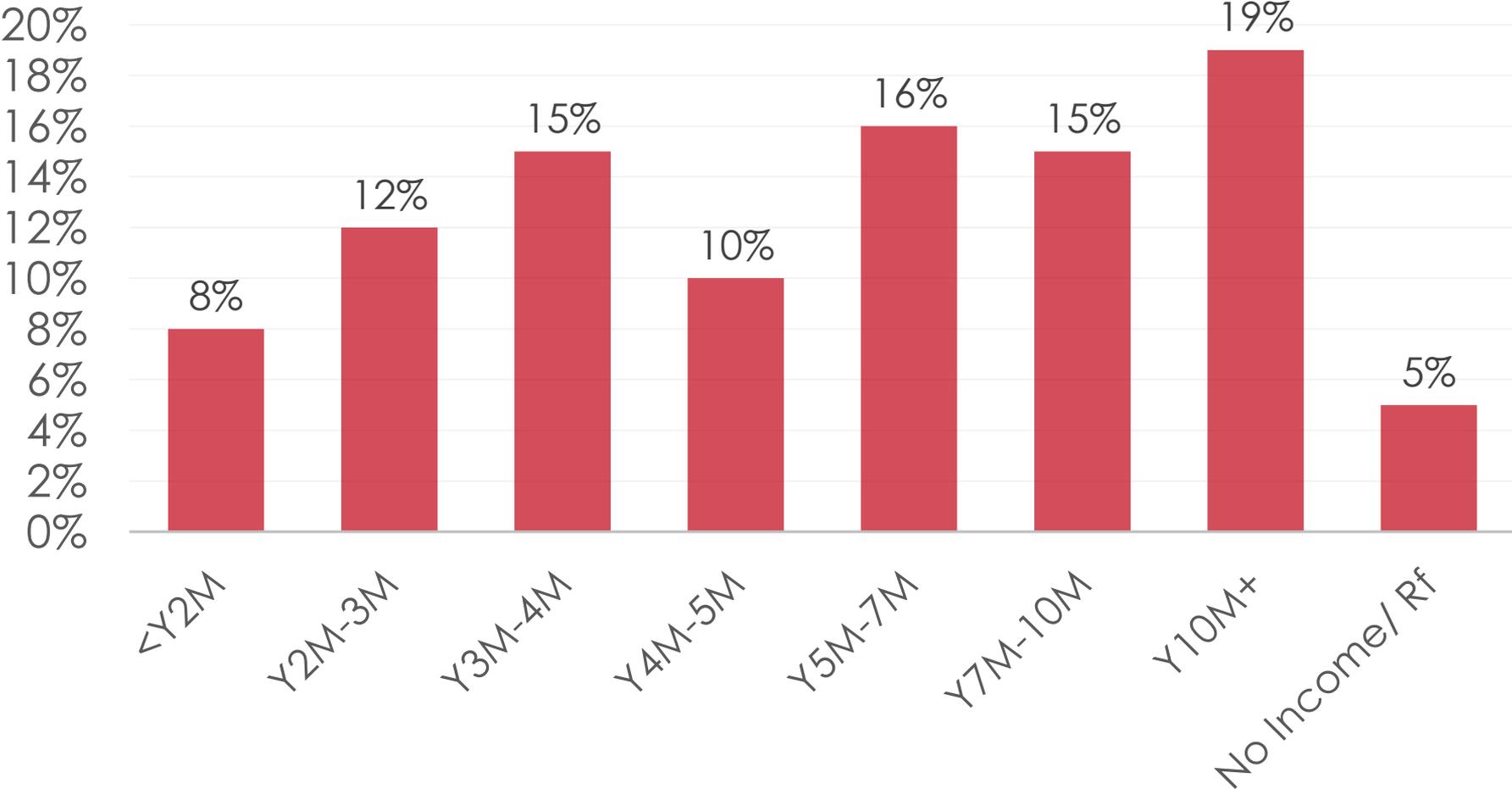
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q26	Less than ¥2 million	8%	3%	4%	7%	7%		8%	10%
	¥2,000,001 ~ ¥3,000,000	12%	7%	11%	28%	7%		16%	15%
	¥3,000,001 ~ ¥4,000,000	15%	11%	15%	24%	7%		14%	19%
	¥4,000,001 ~ ¥5,000,000	10%	10%	9%	9%	20%	50%	8%	9%
	¥5,000,001 ~ ¥7,000,000	16%	20%	15%	12%	20%		27%	16%
	¥7,000,001 ~ ¥10 million	15%	22%	19%	9%	27%	25%	12%	11%
	¥10 million or more	19%	24%	23%	11%	7%	25%	14%	15%
	No Income	5%	3%	4%	1%	7%			6%
	Total	1009	434	459	138	15	4	49	312

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Travel Party
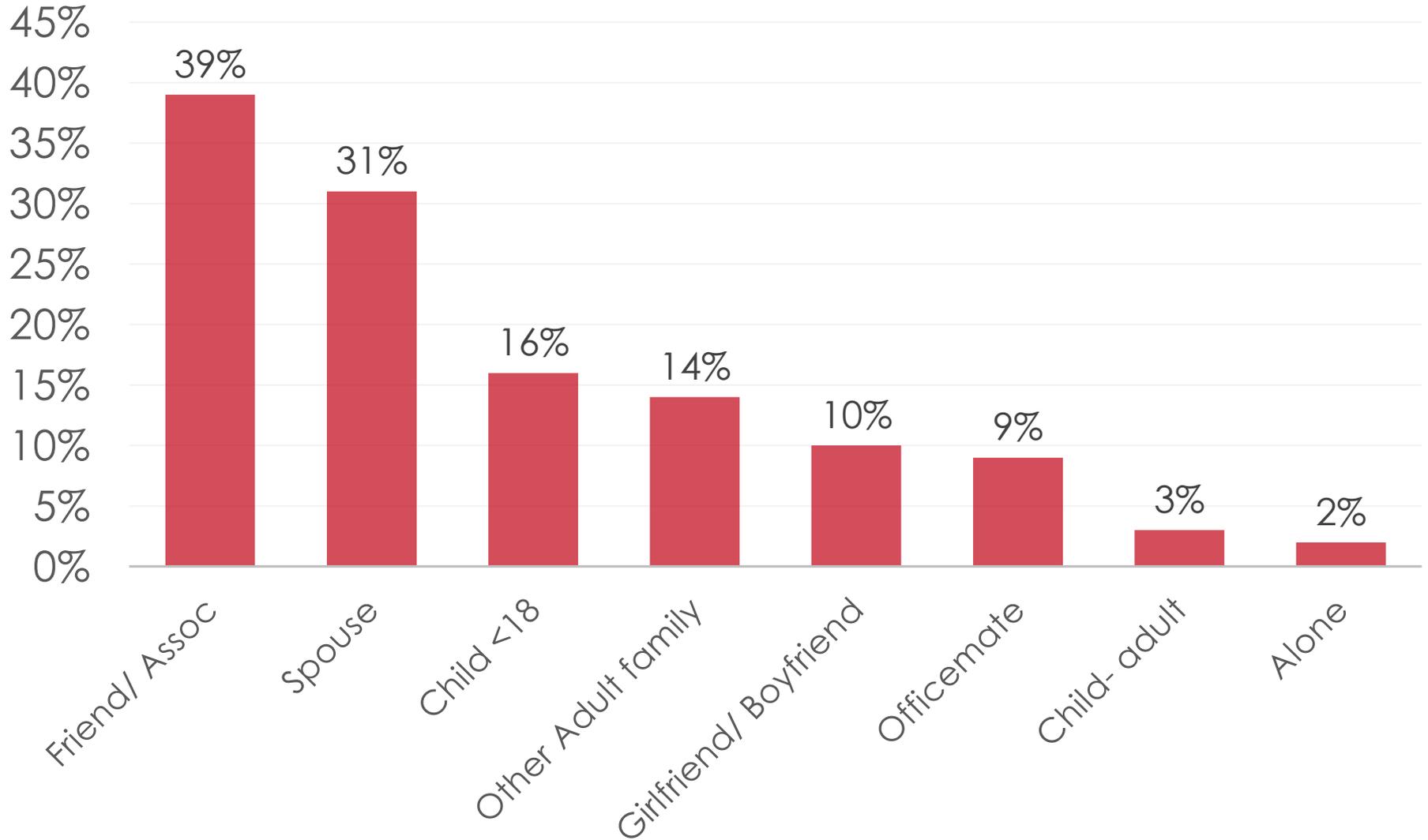
Travel Party

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Spouse	39%	31%		
Child <18	16%	16%		
Friend/ Assoc	31%	39%		
Other Adult Family	14%	14%		
Alone	1%	2%		
Girlfriend/ Boyfriend	10%	10%		
Child- Adult	3%	3%		
Office	11%	9%		

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Travel Party - Children

16% TRAVELING WITH A CHILD

[A]

Trips to Guam

Repeat
45%

First time
55%

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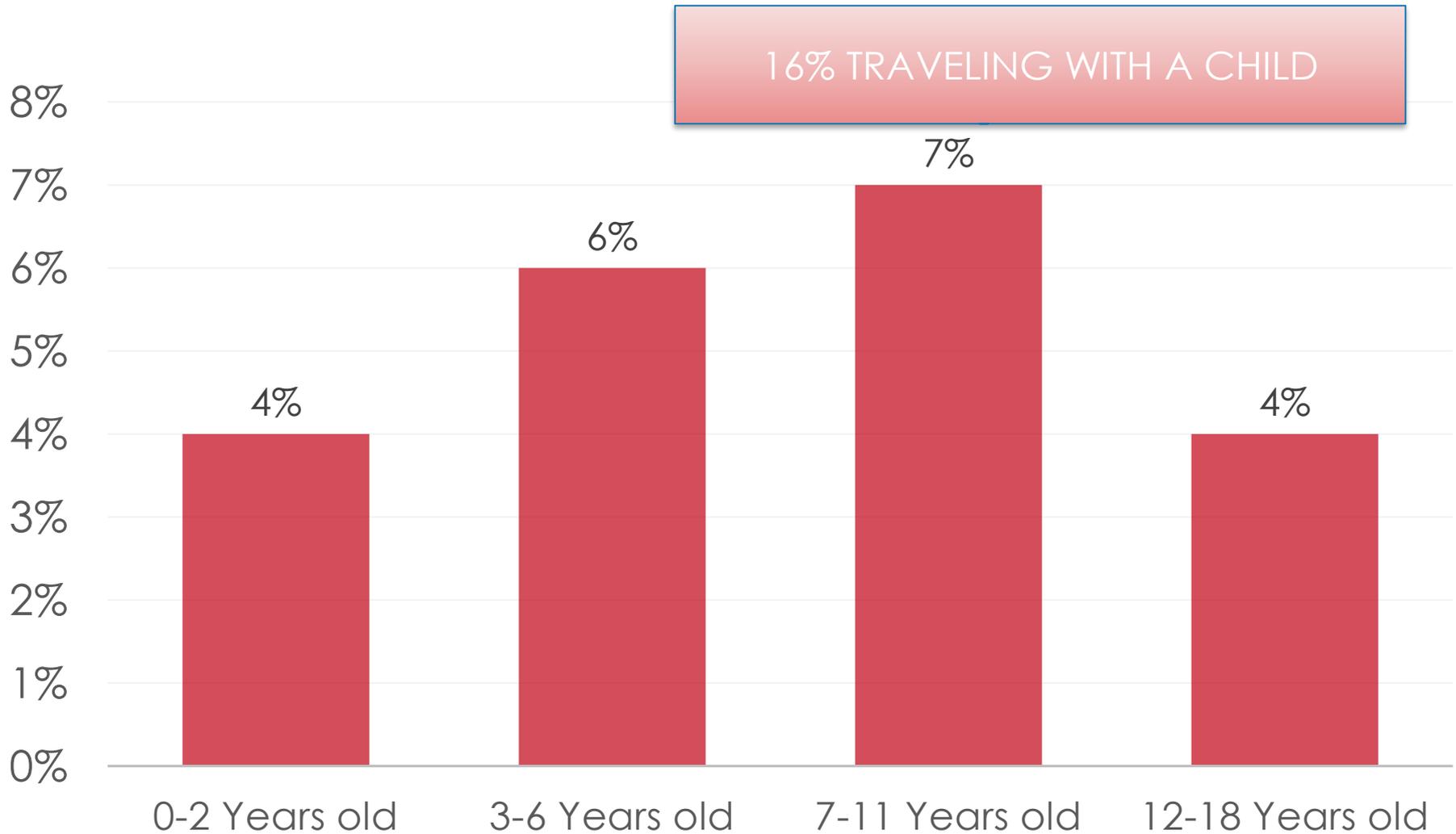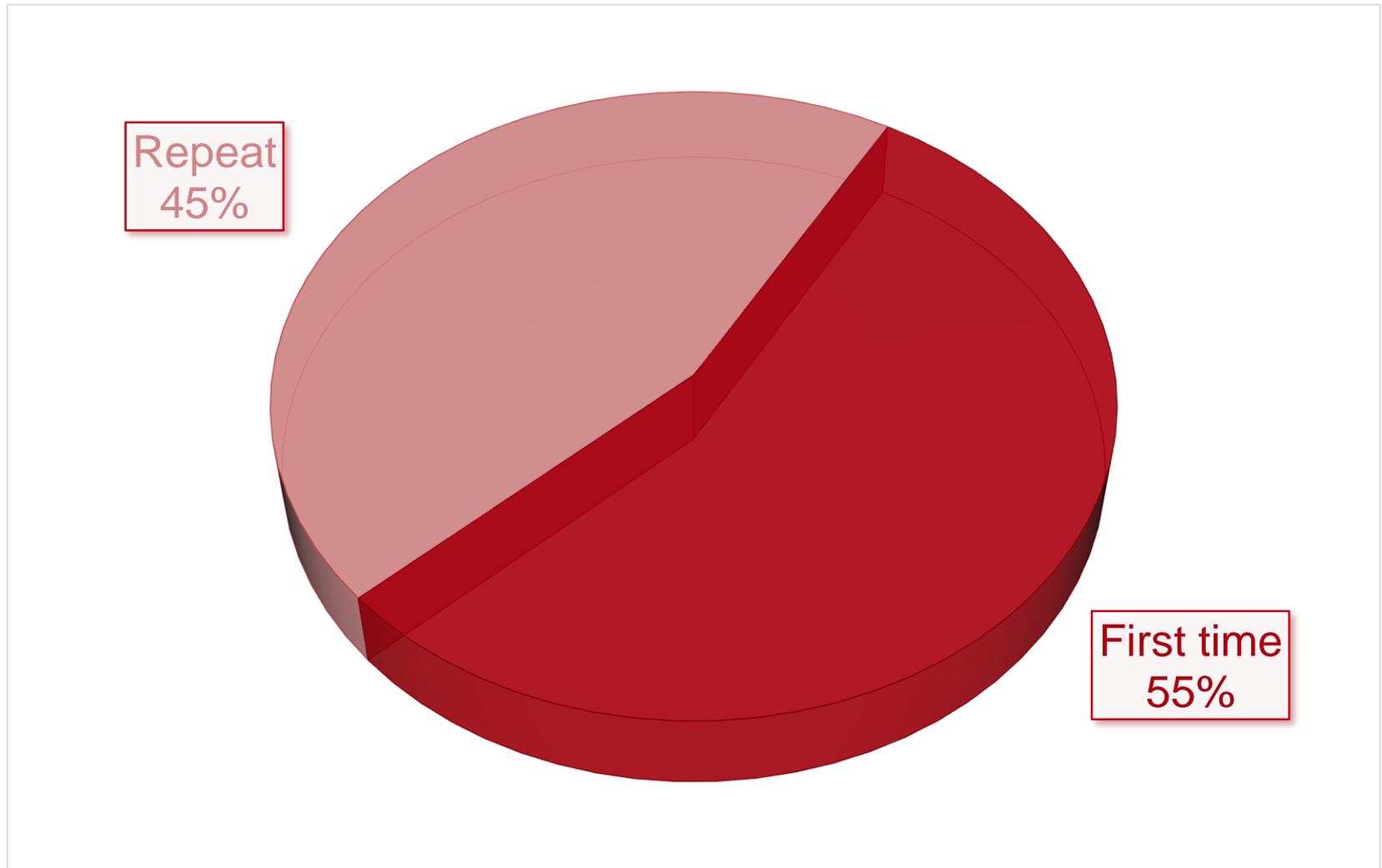
Trips to Guam – FY2018 Tracking
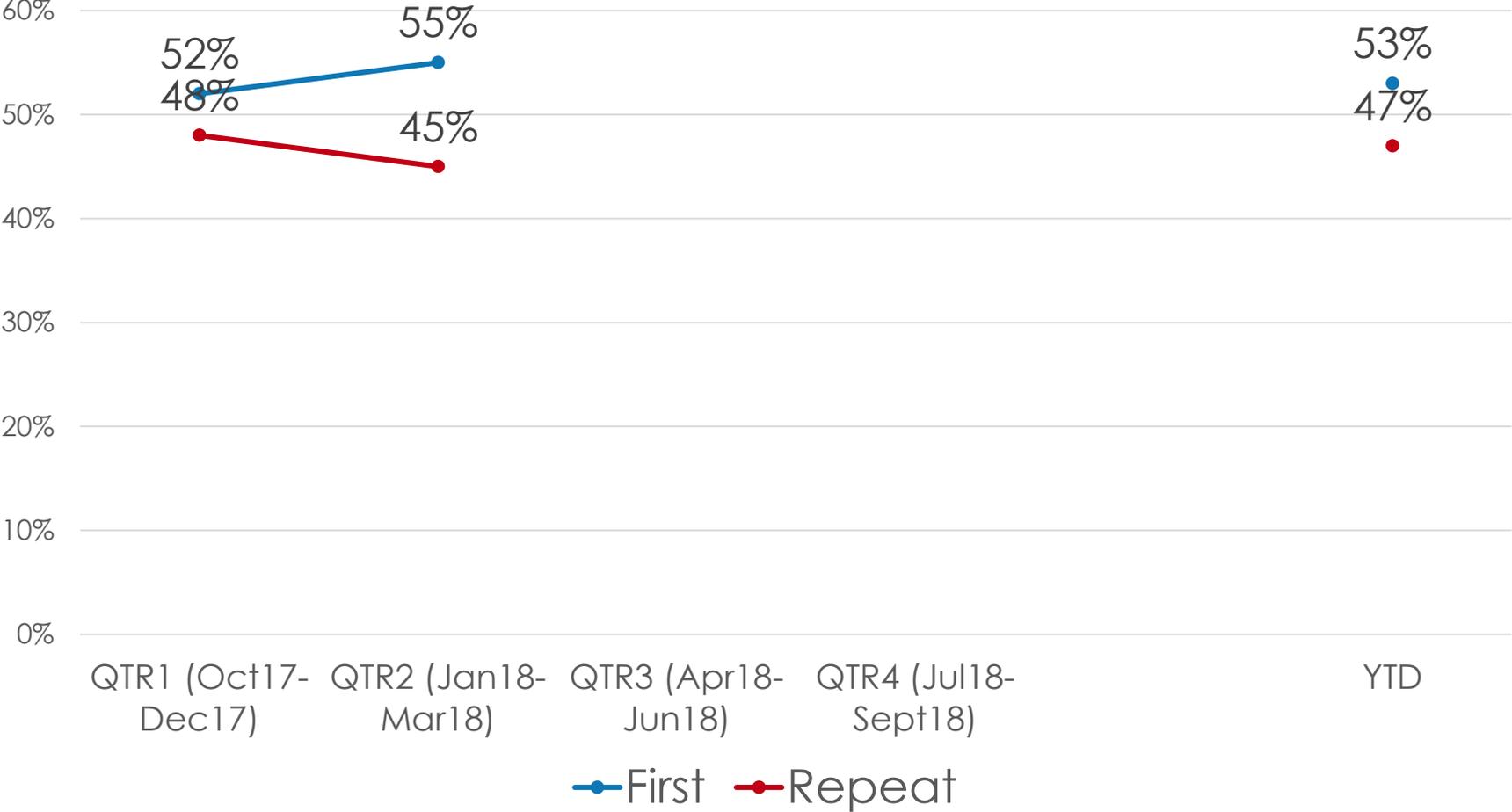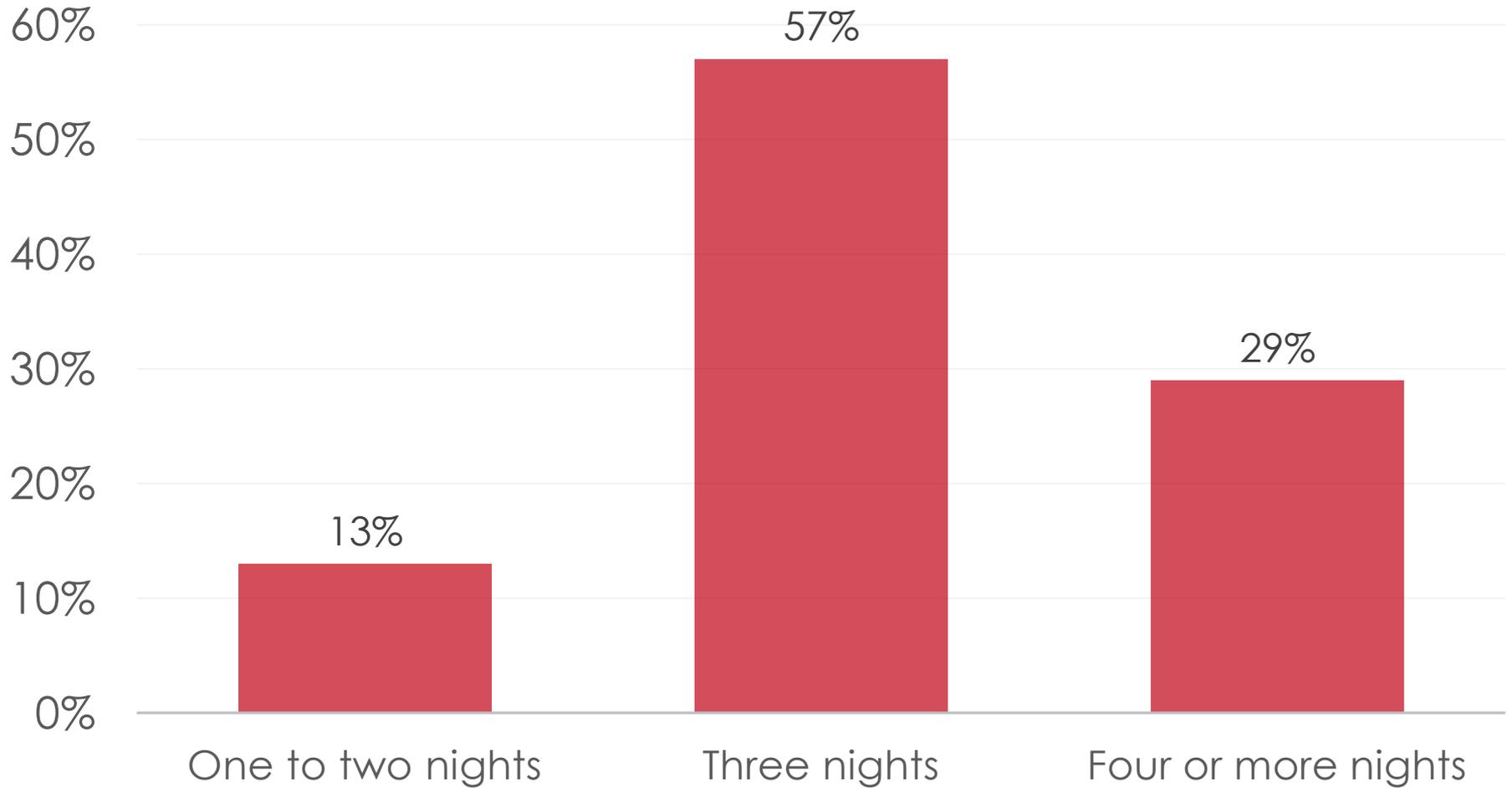
Trips to Guam – Key Segments

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	55%	40%		38%	18%	50%	71%	53%
	Repeat	45%	60%	100%	63%	82%	50%	29%	47%
	Total	1058	453	478	144	17	4	51	324
Q3	Mean	2.49	3.14	4.30	2.77	3.47	1.50	1.39	2.65
	Median	1	2	3	2	3	2	1	1

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[A]

Length of Stay

Bar chart — Length of Stay:
- One to two nights: 13%
- Three nights: 57%
- Four or more nights: 29%

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Length of Stay – FY2018 Tracking

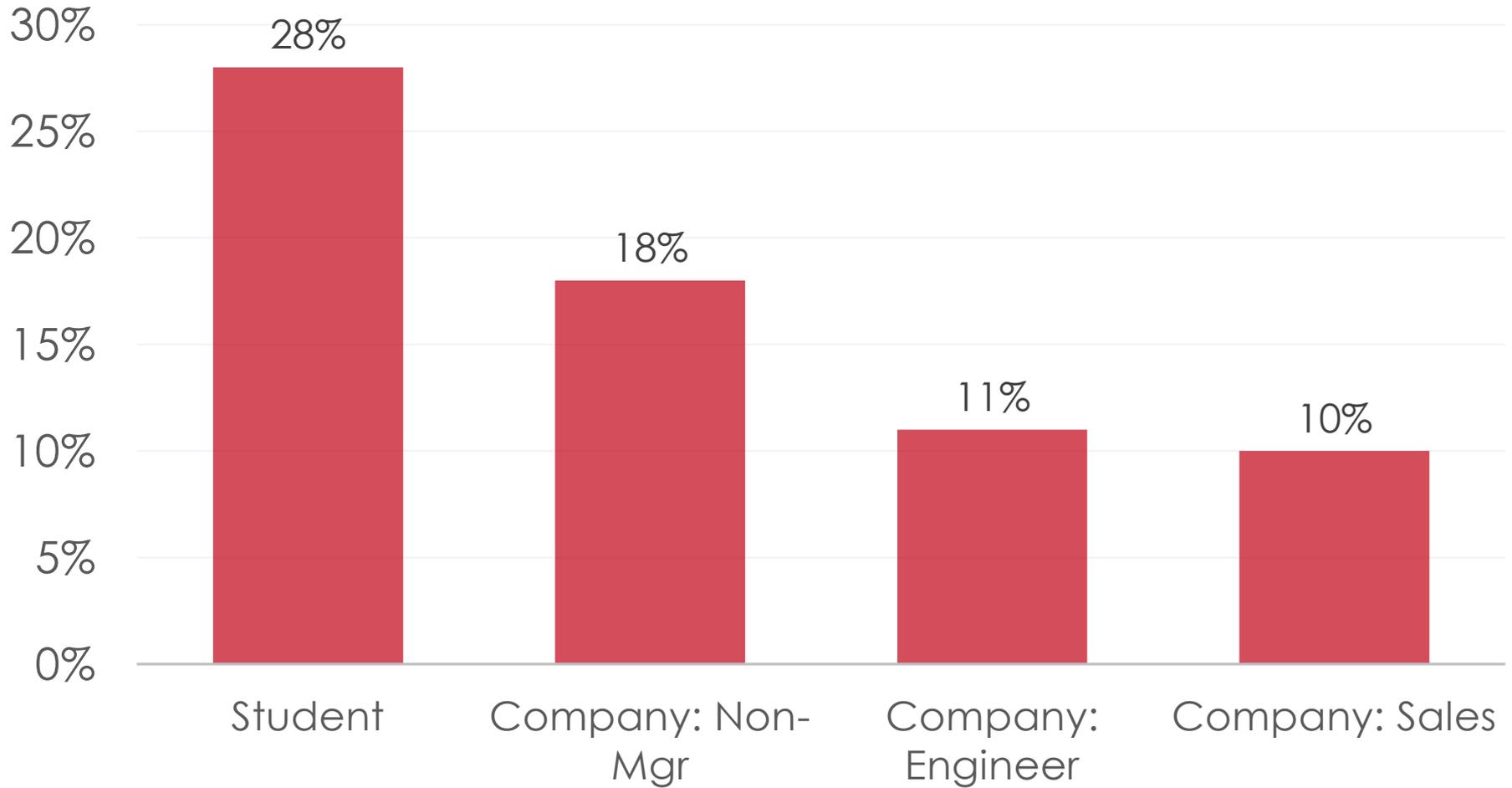|	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	3.27	3.26				3.27
MEDIAN	3	3				3

[A]

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	13%	8%	15%	26%	6%	25%	18%	22%
	3	57%	52%	52%	51%	53%	50%	37%	58%
	4+	29%	40%	33%	23%	41%	25%	45%	21%
	Total	1058	453	478	144	17	4	51	324
SA	Mean	3.26	3.54	3.32	2.97	3.65	3.00	3.41	3.02
	Median	3	3	3	3	3	3	3	3

Prepared by Anthology Research

[A]

Occupation – Top Responses (10%+)

Bar chart showing occupation top responses:
- Student: 28%
- Company: Non-Mgr: 18%
- Company: Engineer: 11%
- Company: Sales: 10%

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SECTION 2
TRAVEL PLANNING

[A]

Organized Group Tour

Organized
Group Tour
31%

No
69%

[A]
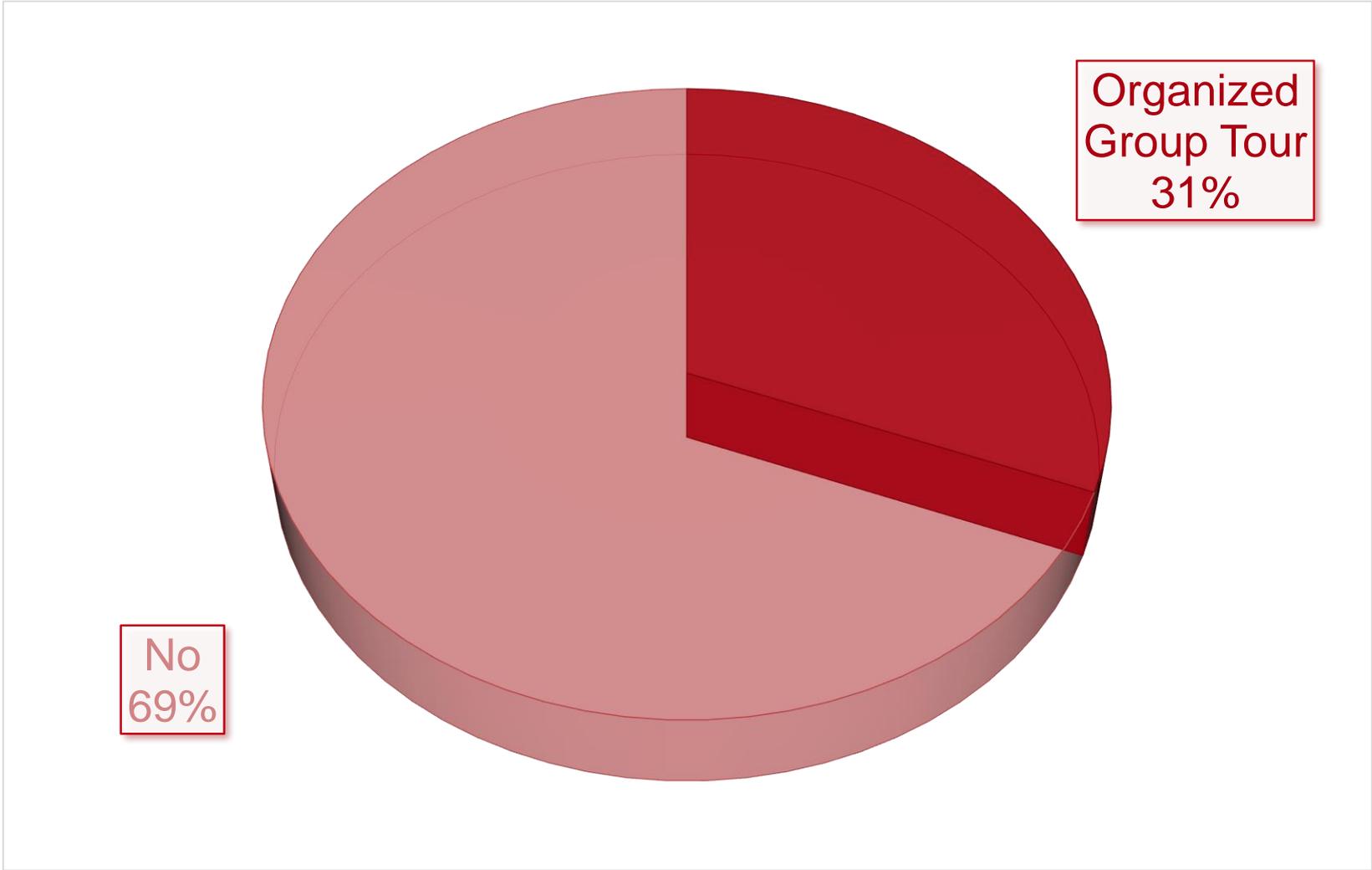
Organized Group Tour- Tracking

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Organized Group Tour	30%	31%				30%

[A]

Travel Arrangements - Sources

[A]
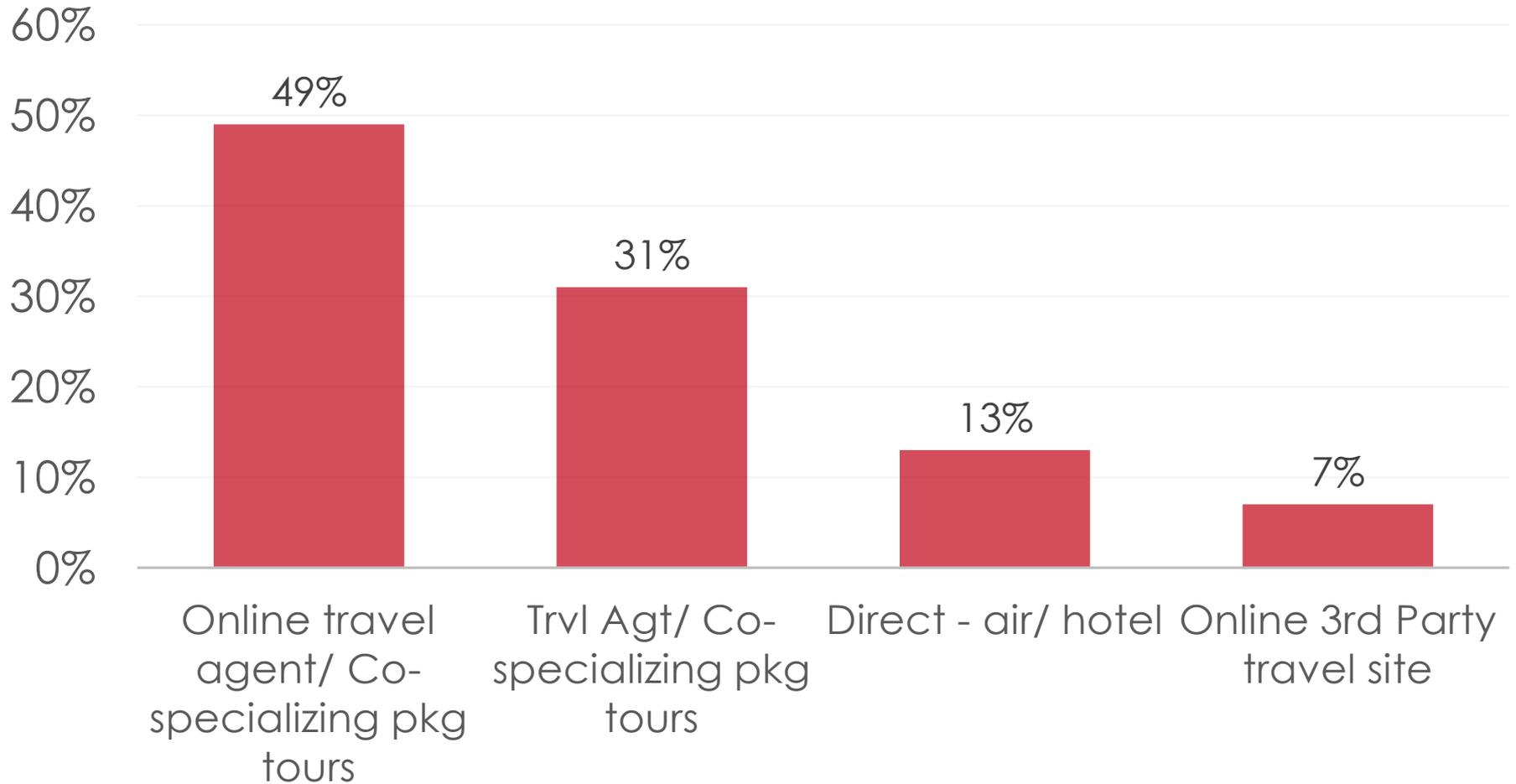
Travel Arrangements - Sources
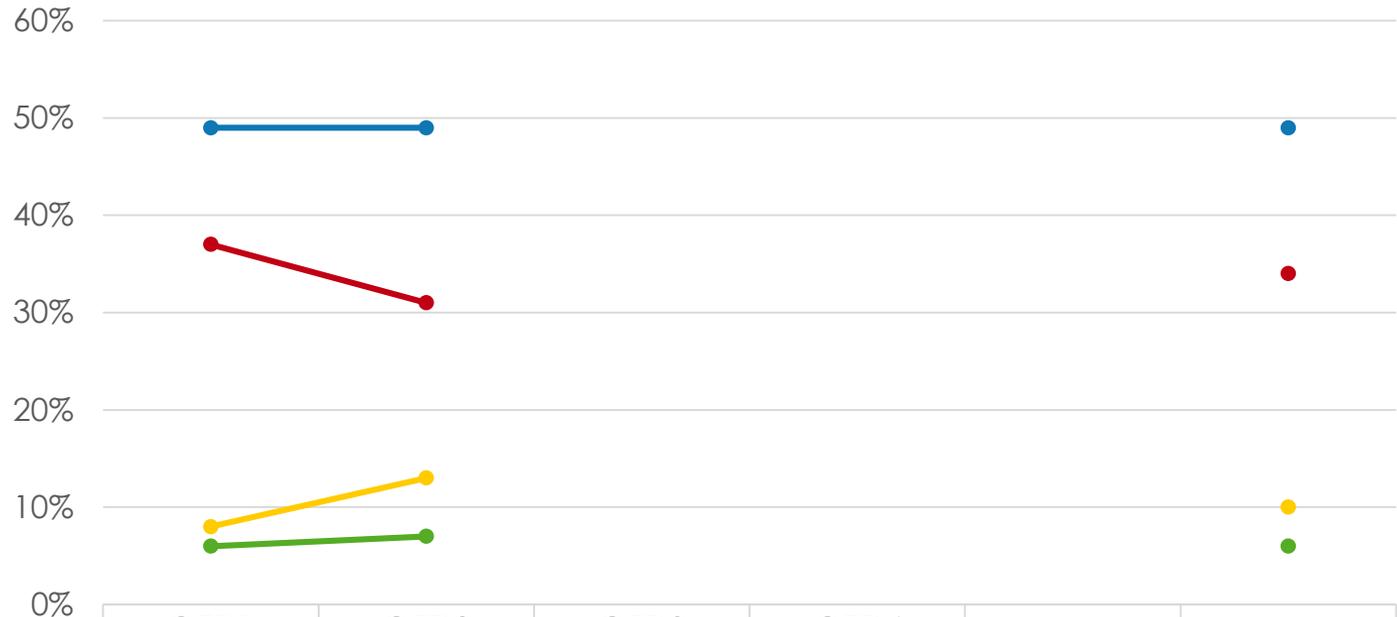
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
Online travel agent	49%	49%				49%
Trvl Agt/ Co- Pkg Tour	37%	31%				34%
Online 3rd Party	6%	7%				6%
Direct Air/ Hotel	8%	13%				10%

[A]

Prepaid Package Trip

No
13%

Prepaid Pkg
87%

[A]

Prepaid Package Trip
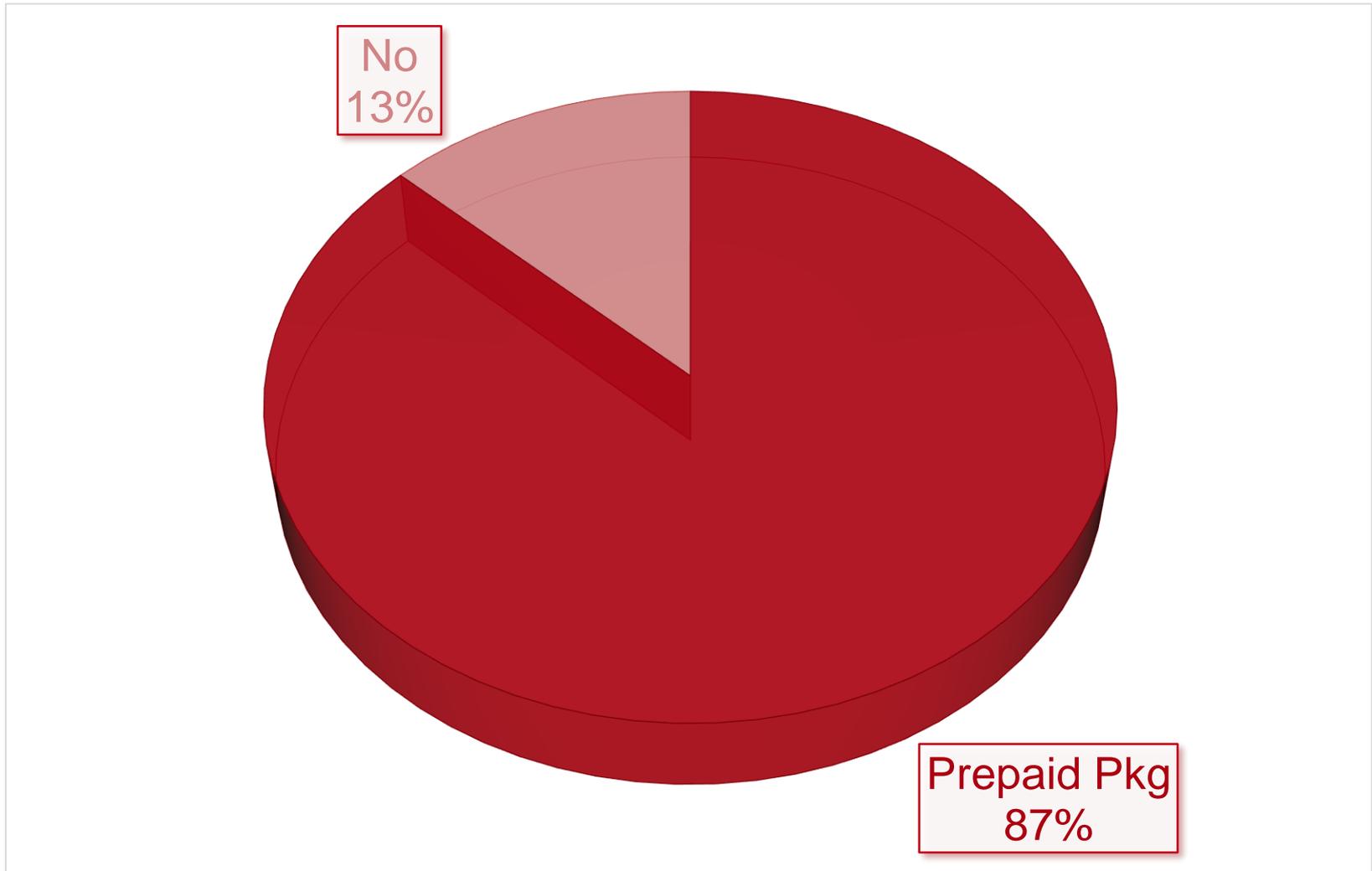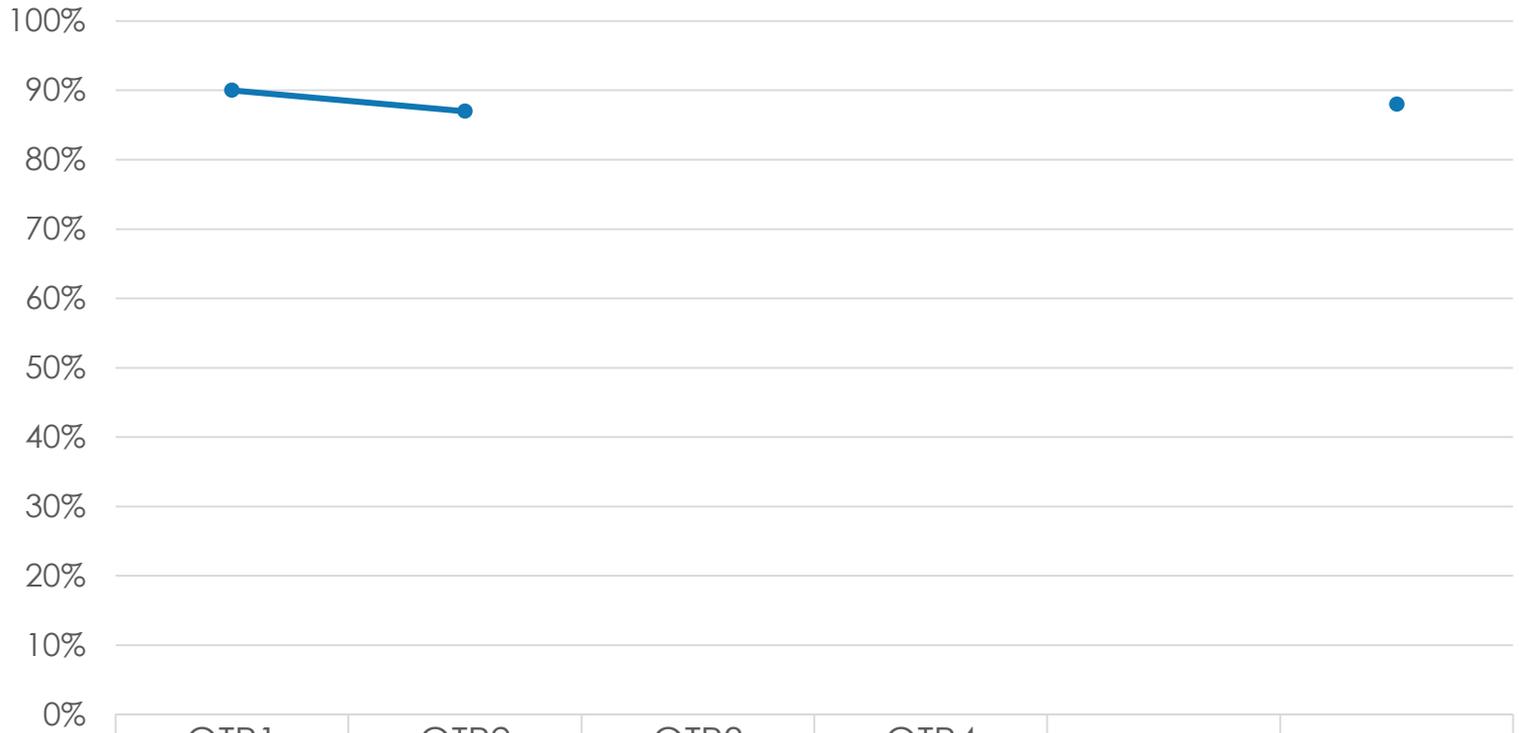
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
●— Prepaid Pkg Trip	90%	87%				88%

[A]

Accommodations (Top Responses)

Chart showing "Stayed At" (bars) and "Length of Stay" (line) by accommodation:

Accommodation	Stayed At	Length of Stay
Outrigger	13%	3.19
Guam Plaza	11%	3.21
Holiday Resort	8%	3.34
Hotel Nikko	6%	3.38
Royal Orchid	6%	3.03
Guam Reef & Olive	6%	2.98
Fiesta Resort	5%	3.44
PIC	5%	3.39

Legend: Stayed At, Length of Stay

[A]
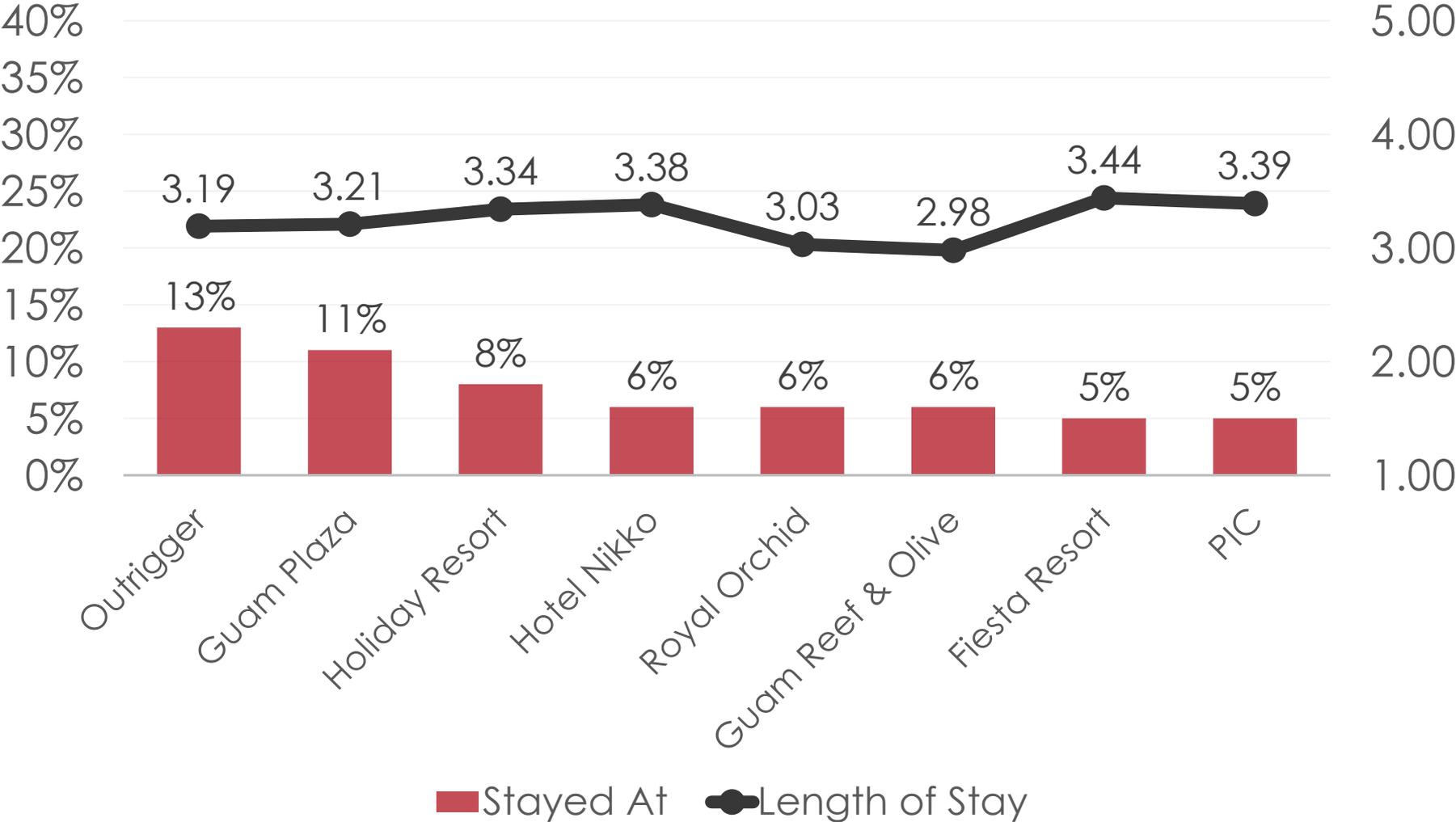
Travel Motivation (Top Responses)

Motivation	Percentage
Natural beauty	77%
Short travel time	42%
Pleasure	30%
Shopping	28%
Prior trip	21%
Relax	18%
Price	15%
Recom	14%
Water sport	12%
Bus Trip	6%

[A]
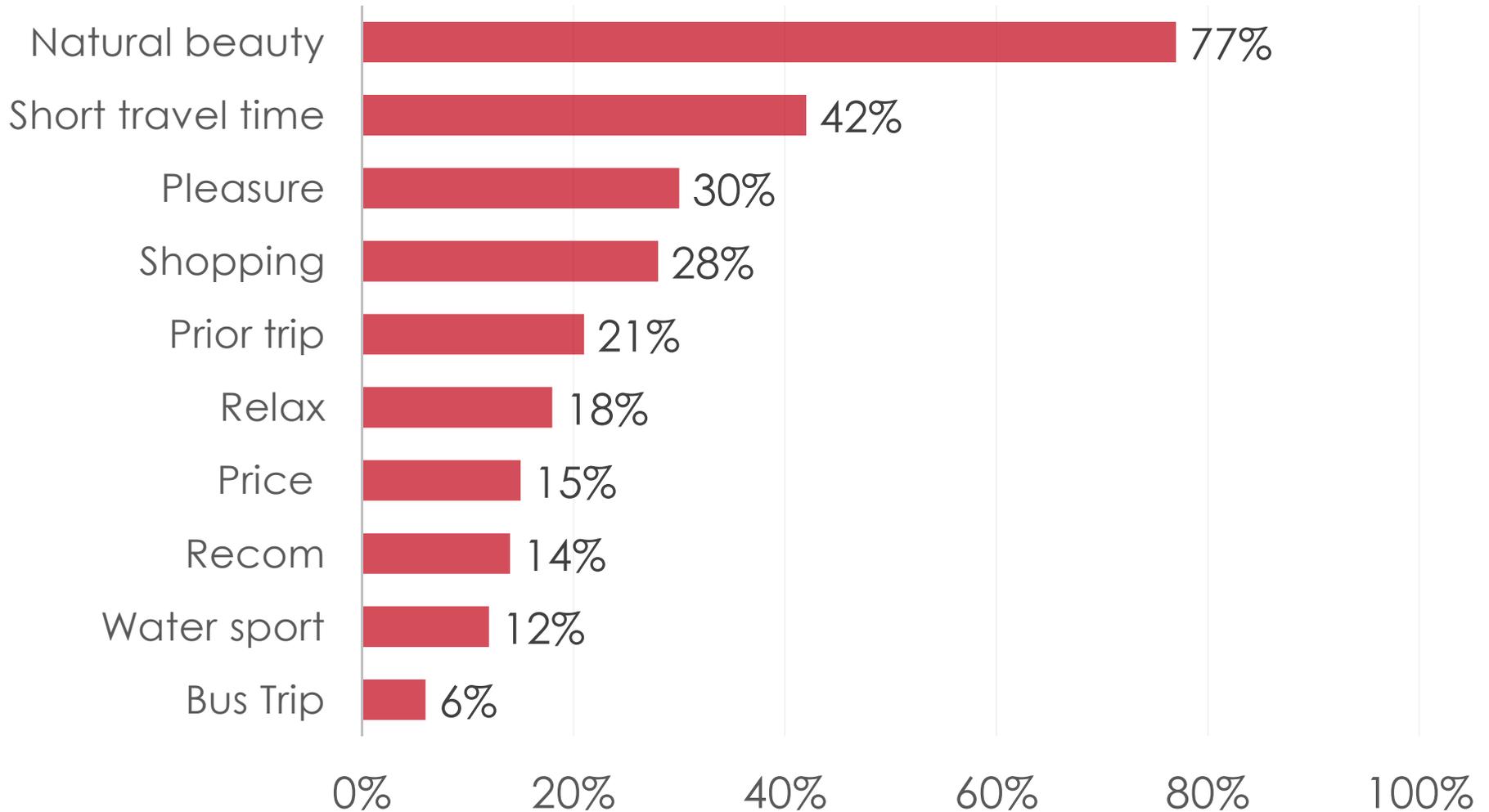
Travel Motivation – Key Segments

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	77%	75%	75%	67%	76%	25%	53%	72%
	Short travel time (not too far from home)	42%	53%	47%	42%	76%	75%	16%	33%
	Pleasure/ vacation	30%	26%	24%	23%	35%		16%	24%
	Shopping	28%	24%	24%	26%	12%	25%	27%	27%
	A previous visit	21%	27%	46%	33%	24%			25%
	Just to relax	18%	20%	21%	19%	24%		8%	15%
	Price of the tour package	15%	12%	12%	15%			2%	15%
	Recommendation of friend/ relative/ travel agency	14%	7%	8%	10%	12%	25%	8%	17%
	Water sports (snorkeling, windsurfing, parasailing)	12%	11%	9%	13%	12%	25%	4%	11%
	Company/ business trip	6%	0%	6%	11%				17%
	It is a safe place to spend a vacation	6%	5%	5%	6%		25%	4%	5%
	To Get Married/ attend Wedding	5%	10%	3%	8%			100%	8%
	Honeymoon	5%	10%	1%	3%			22%	1%
	Scuba diving	4%	4%	6%	6%				4%
	To visit friends or relatives	2%	2%	2%	1%	12%		2%	2%
	To golf	2%	3%	3%	1%	12%			3%
	Adventure	1%	1%	1%	1%				1%
	Organized sporting activity/ event	1%	0%	1%	1%				2%
	My company sponsored me	1%	0%	1%	1%				2%
	Shop Guam E-Fest	1%	1%		1%				1%
	School trip	0%		0%	1%				1%
	Career certification/ testing	0%		0%				2%	1%
	Incentive trip	0%	0%	0%			75%		0%
	Convention/ conference/ trade show/ meeting	0%		0%			25%		
	Government or military	0%		0%					
	Total	1056	452	476	144	17	4	51	323

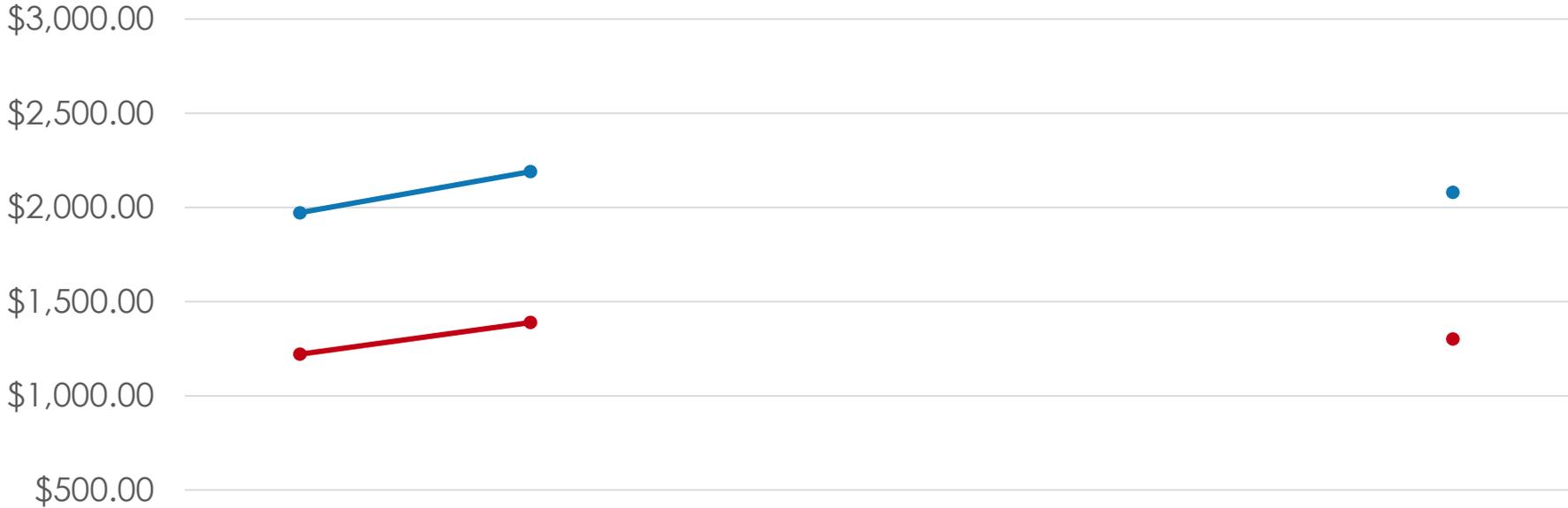Prepared by Anthology Research

[A]

# SECTION 3
EXPENDITURES

[A]

Prepaid Expenditures

- $2,190.35 = overall mean average prepaid expense (for entire travel party size) by respondent

- $998.22 = overall mean average <u>per person</u> prepaid expenditures

[A]

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				$2,080.42
MEDIAN	$1,222.00	$1,390.00				$1,303.00

[A]

Prepaid Per Person– FY2018 Tracking
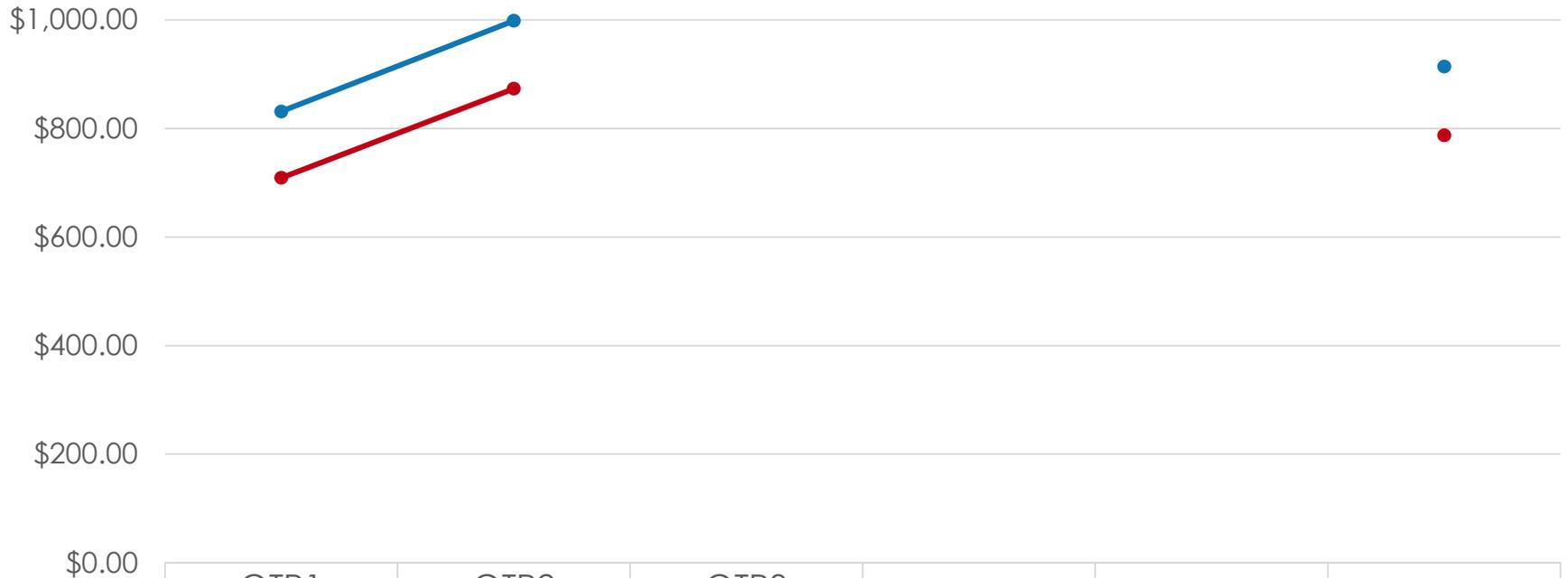
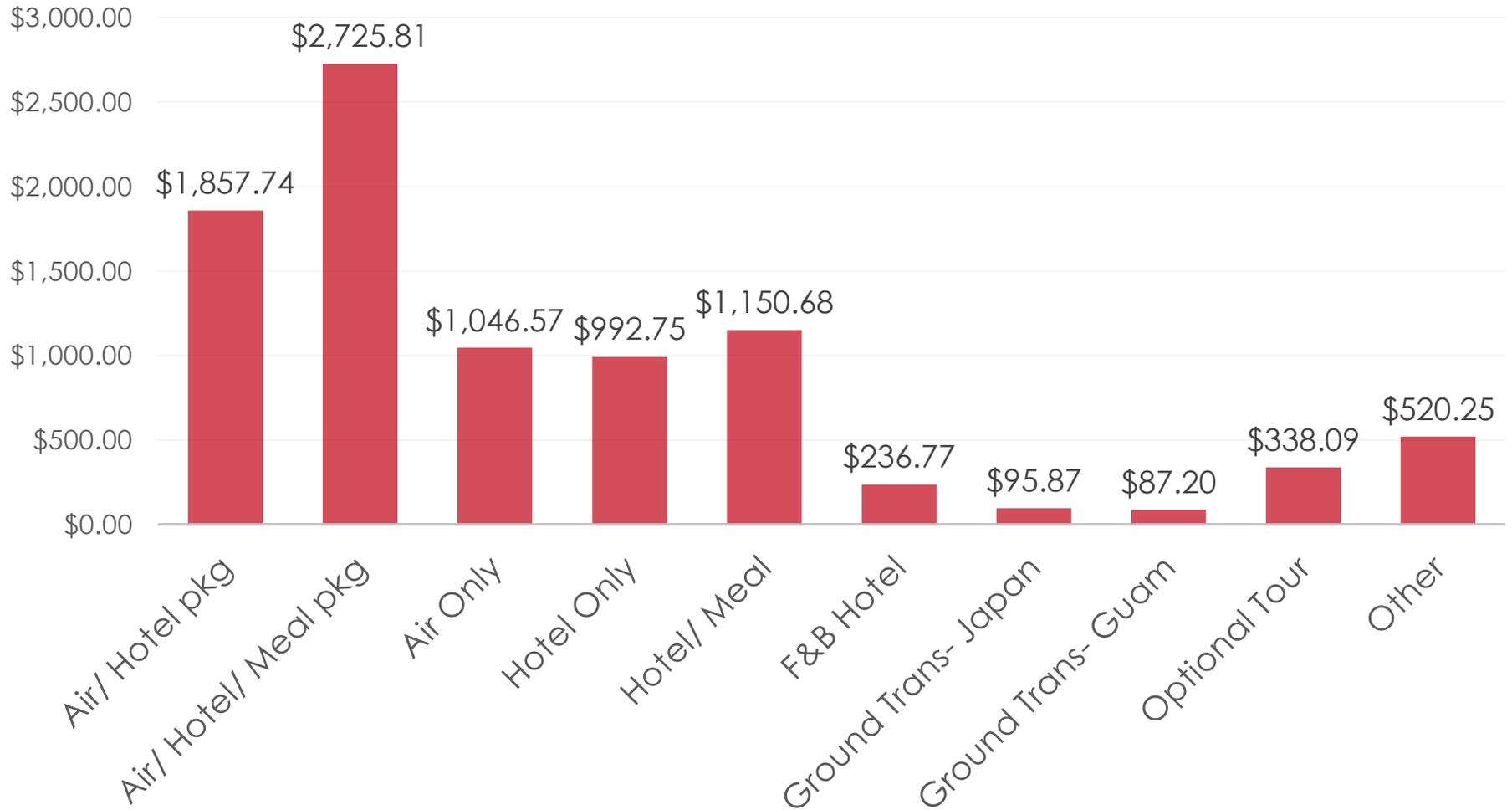|	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$831.21	$998.22				$913.93
MEDIAN	$709.00	$873.00				$787.00

[A]

Prepaid Per Person– Key Segments

GVB EXIT SURVEY
Q10A PREPAID - PER PERSON:

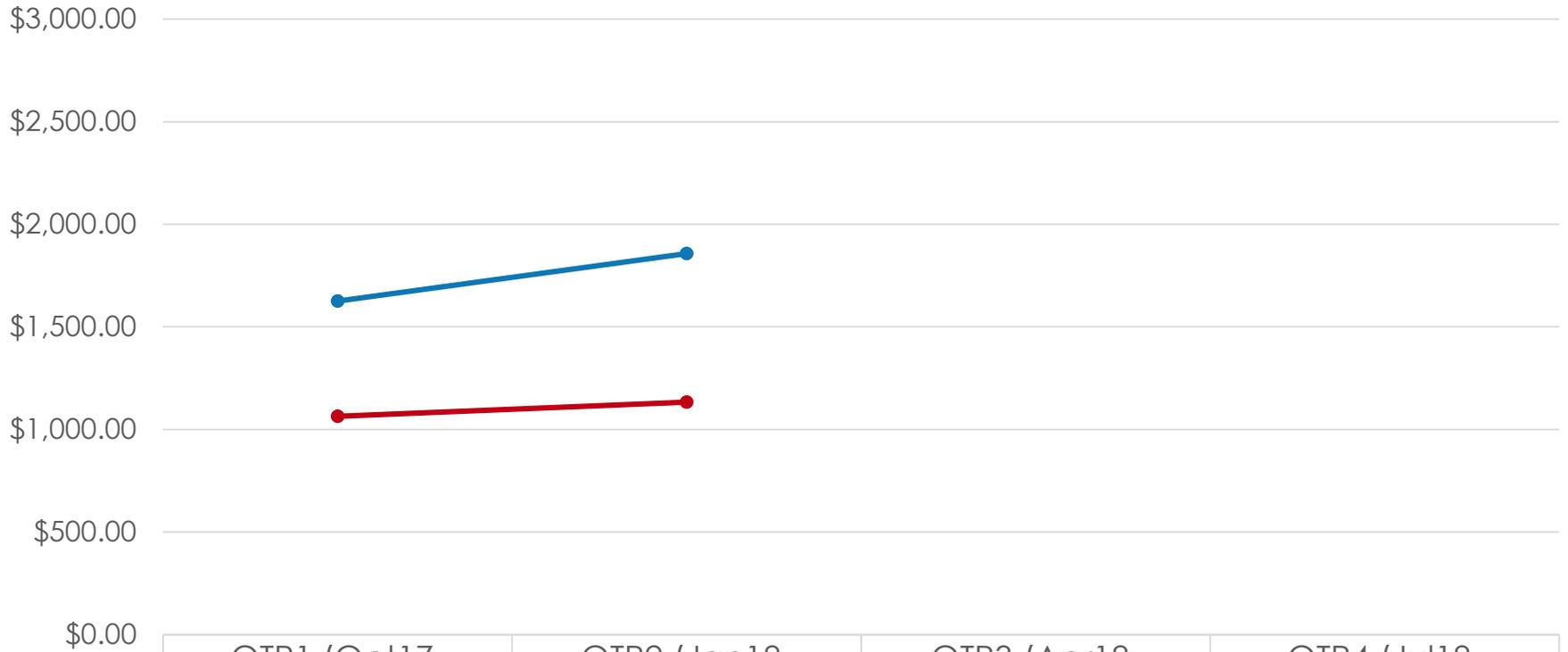|		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
PREPAID PP	Mean	$998.22	$1,231.68	$1,037.90	$953.64	$1,265.61	$845.57	$1,486.55	$829.46
	Median	$873	$1,113	$897	$861	$1,312	$865	$1,114	$725

Prepared by Anthology Research

[A]

Prepaid Expenses by Category – MEAN Entire Travel Party
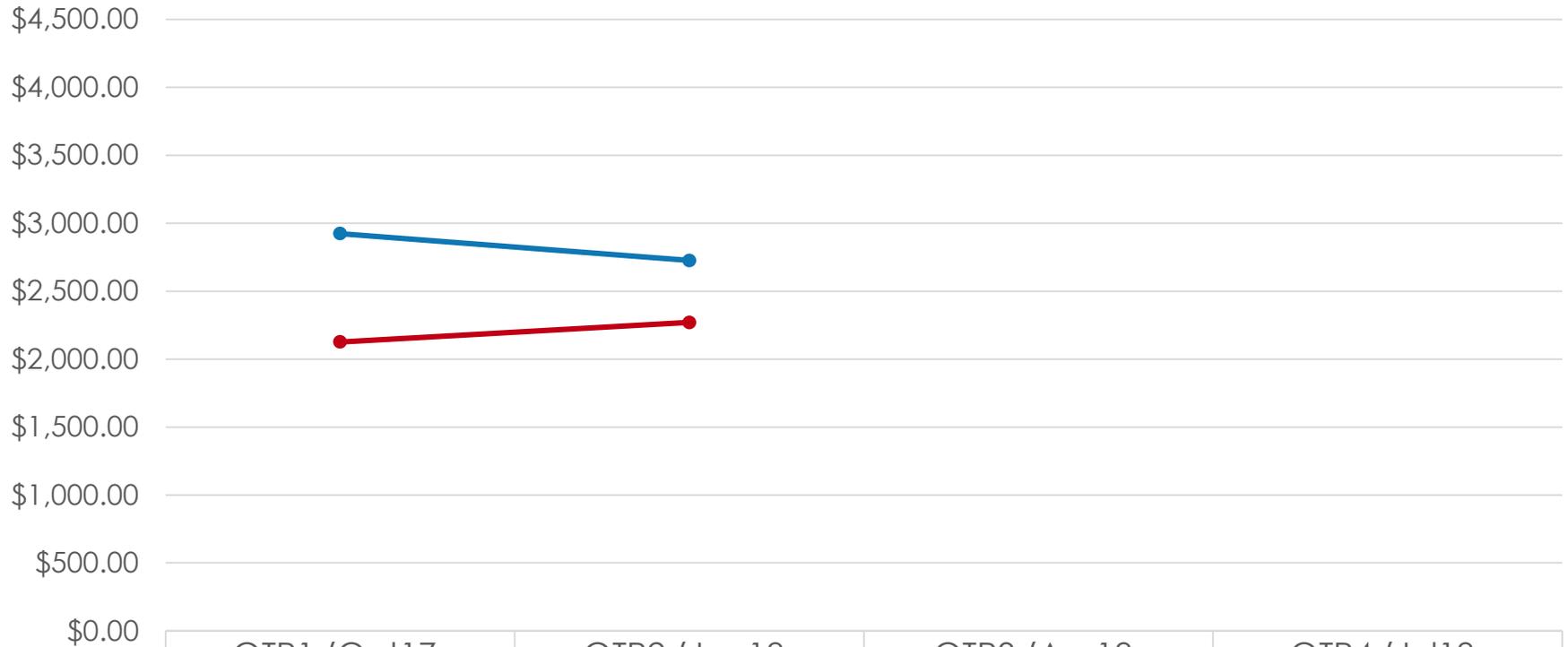
Prepaid– FY2018 Tracking
Airfare & Accommodation Packages

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$1,625.54	$1,857.74		
MEDIAN	$1,064.00	$1,133.00		

[A]

Prepaid– FY2018 Tracking
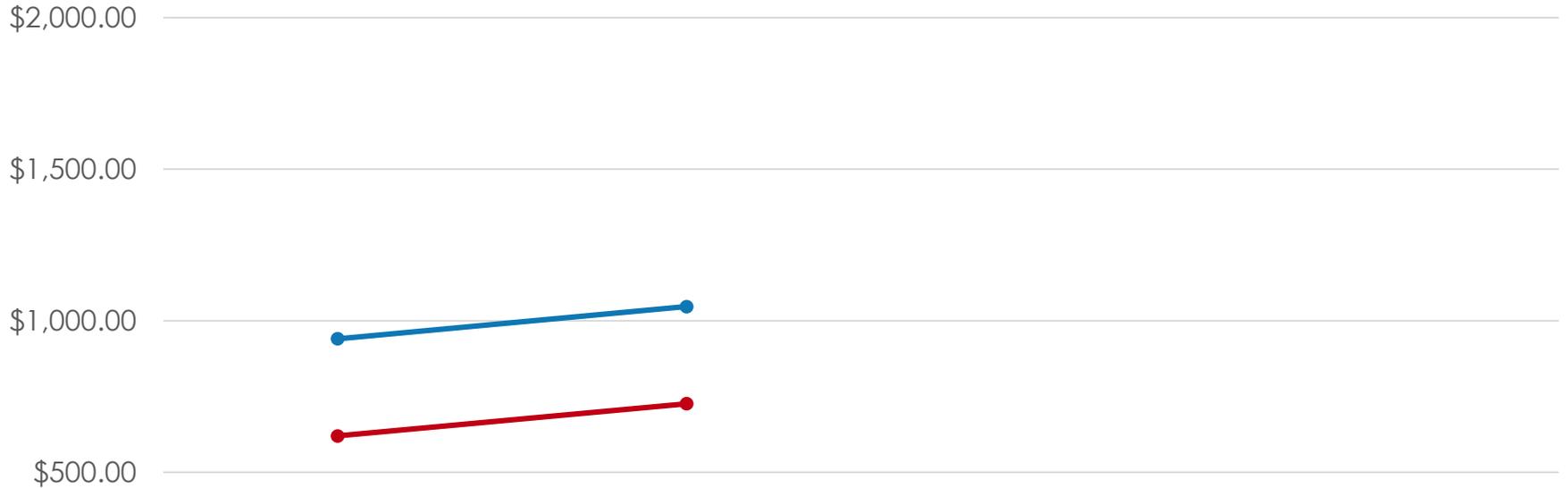## Airfare & Accommodation W/ Meal Packages

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

[A]

Prepaid– FY2018 Tracking
Airfare Only

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

[A]

Prepaid– FY2018 Tracking
Accommodations Only
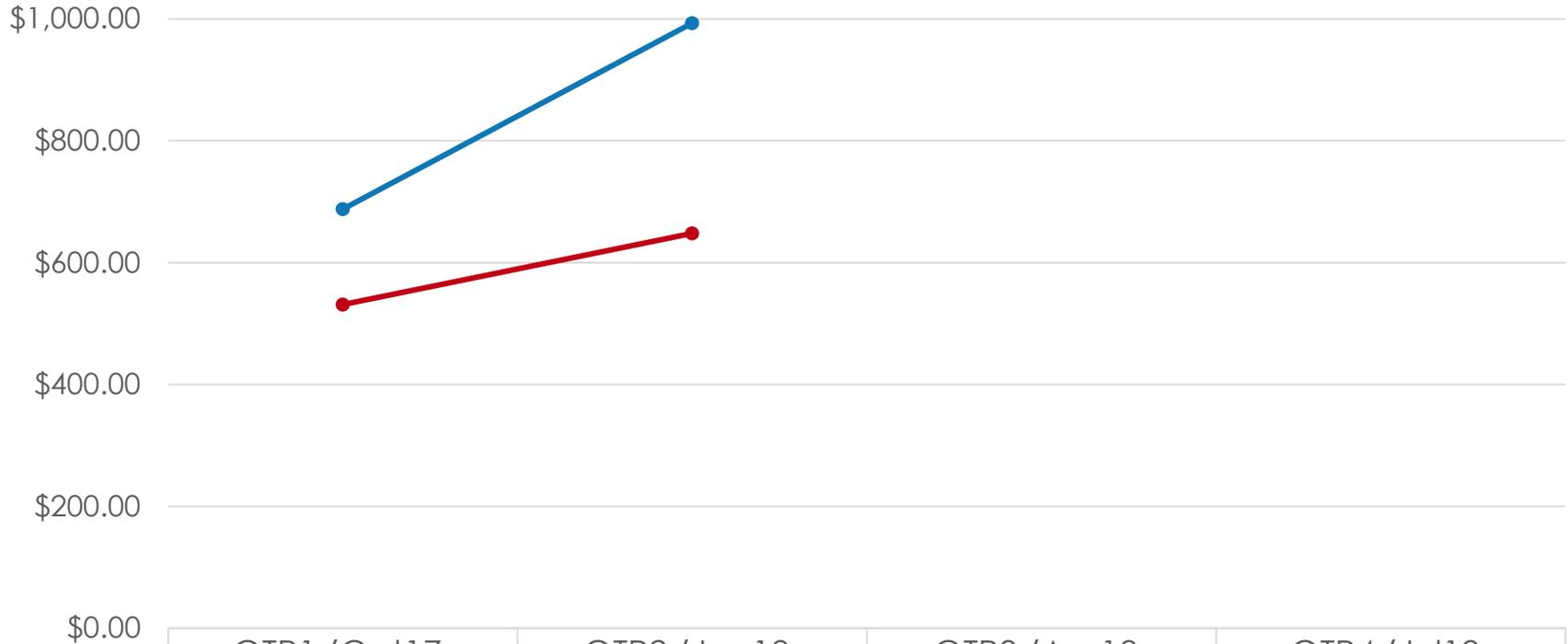
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$687.64	$992.75		
MEDIAN	$531.00	$648.00		

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		
MEDIAN	$532.00	$879.00		

[A]
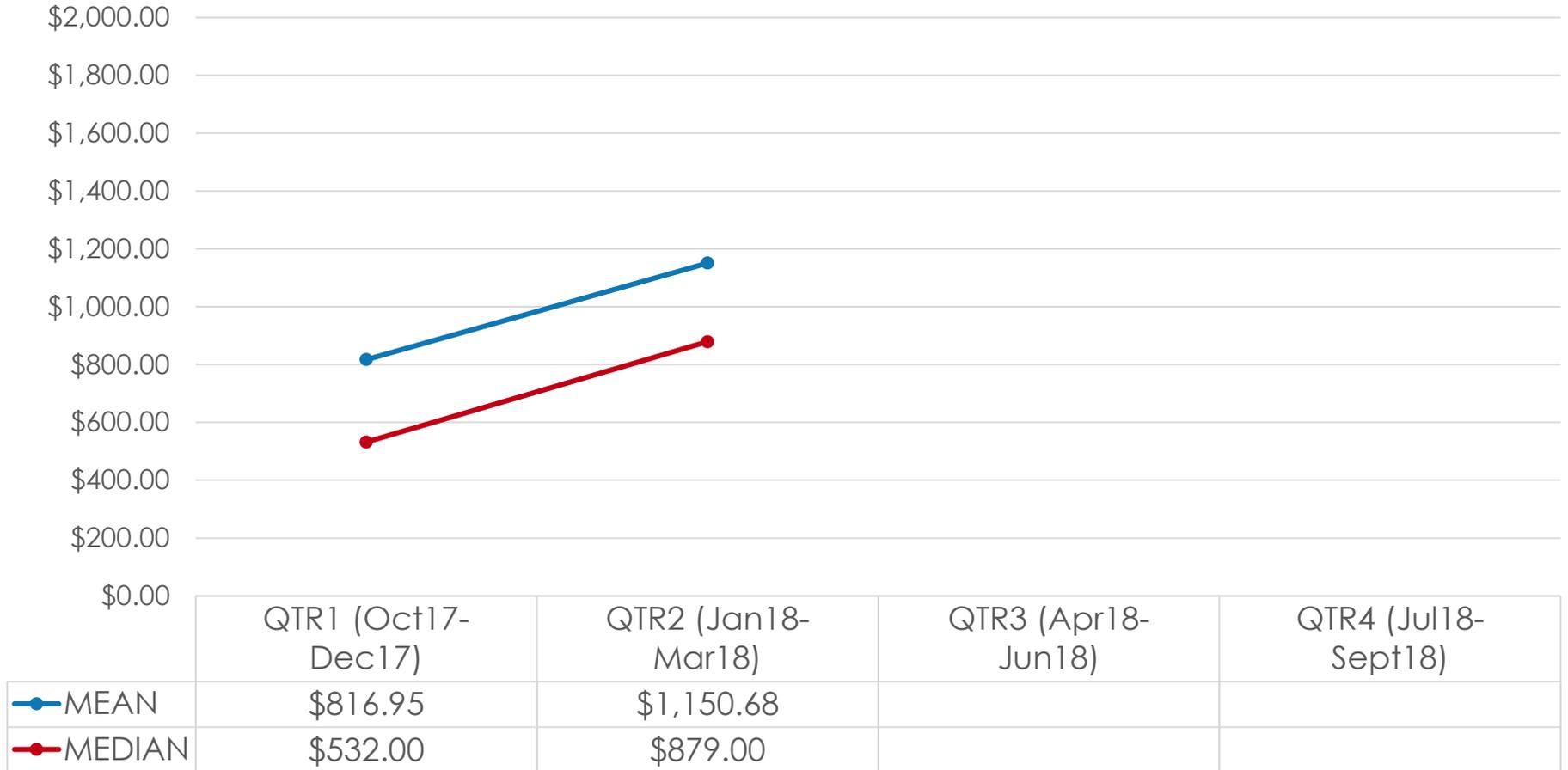
Prepaid– FY2018 Tracking
Food & Beverage in Hotel

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$205.08	$236.77		
MEDIAN	$89.00	$111.00		

[A]

Prepaid– FY2018 Tracking
Ground Transportation - Japan
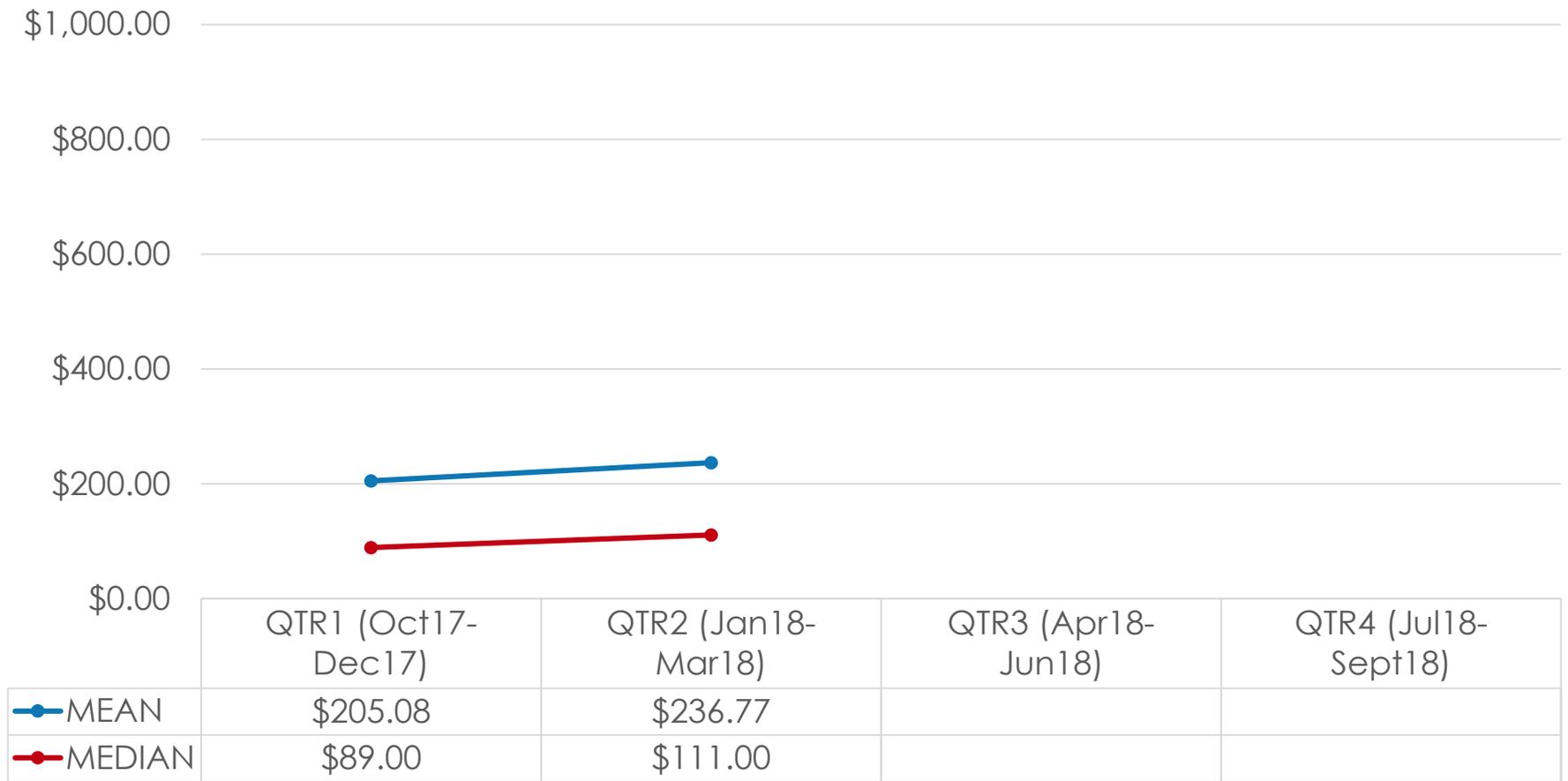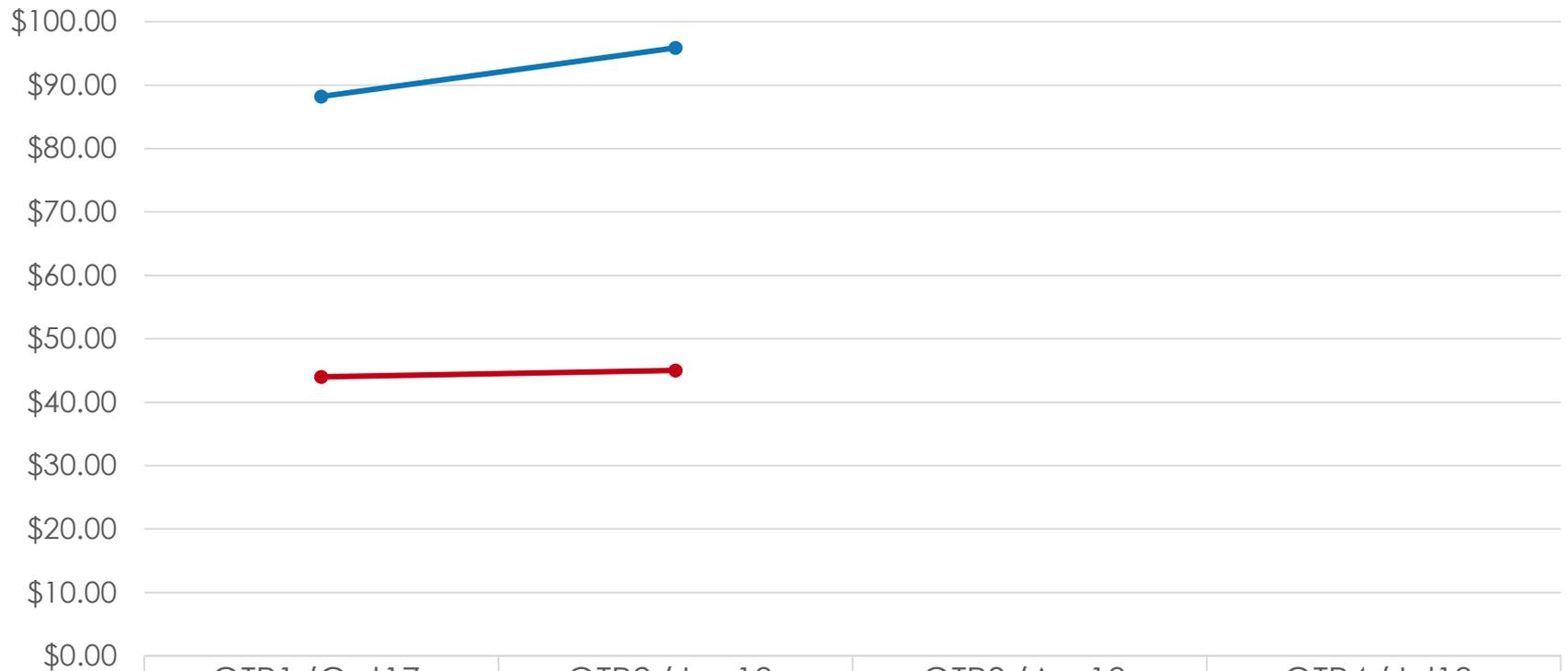
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$88.20	$95.87		
MEDIAN	$44.00	$45.00		

Prepaid– FY2018 Tracking
Ground Transportation - Guam
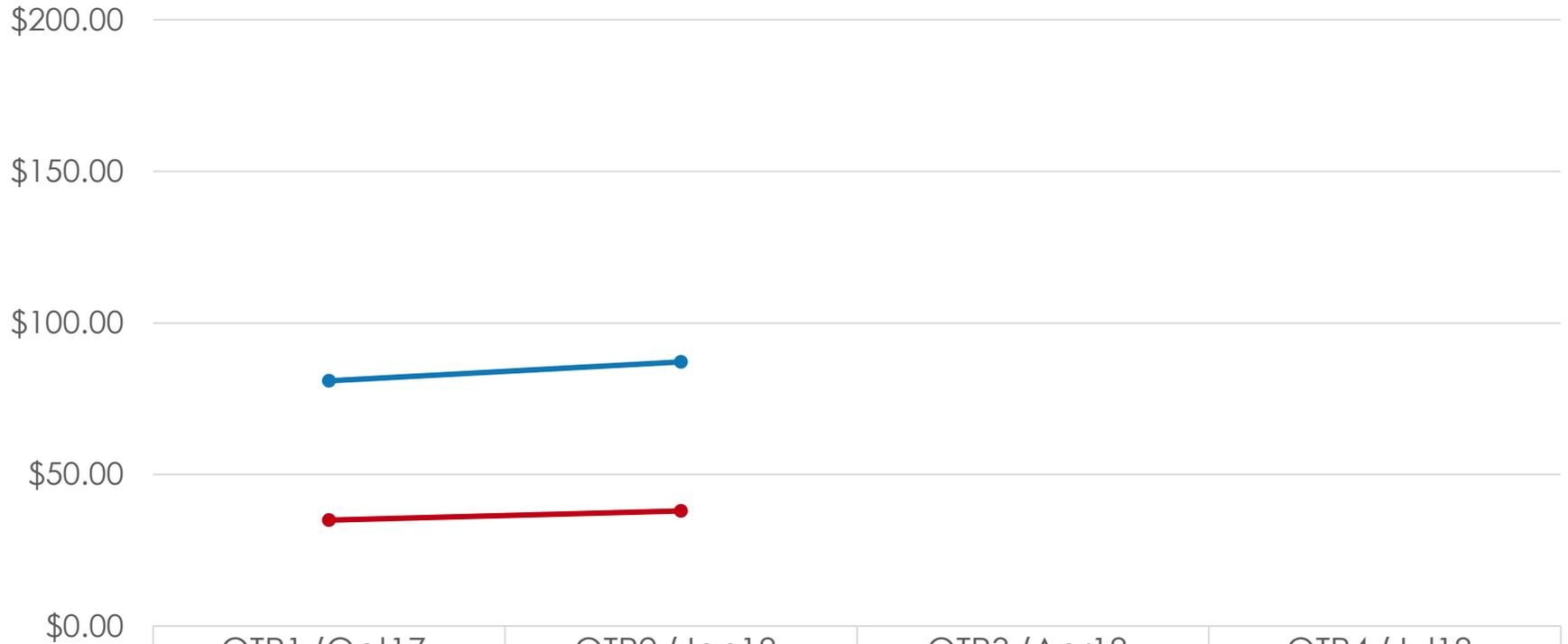
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$80.94	$87.20		
MEDIAN	$35.00	$38.00		

Prepaid– FY2018 Tracking
Optional tours/ Activities
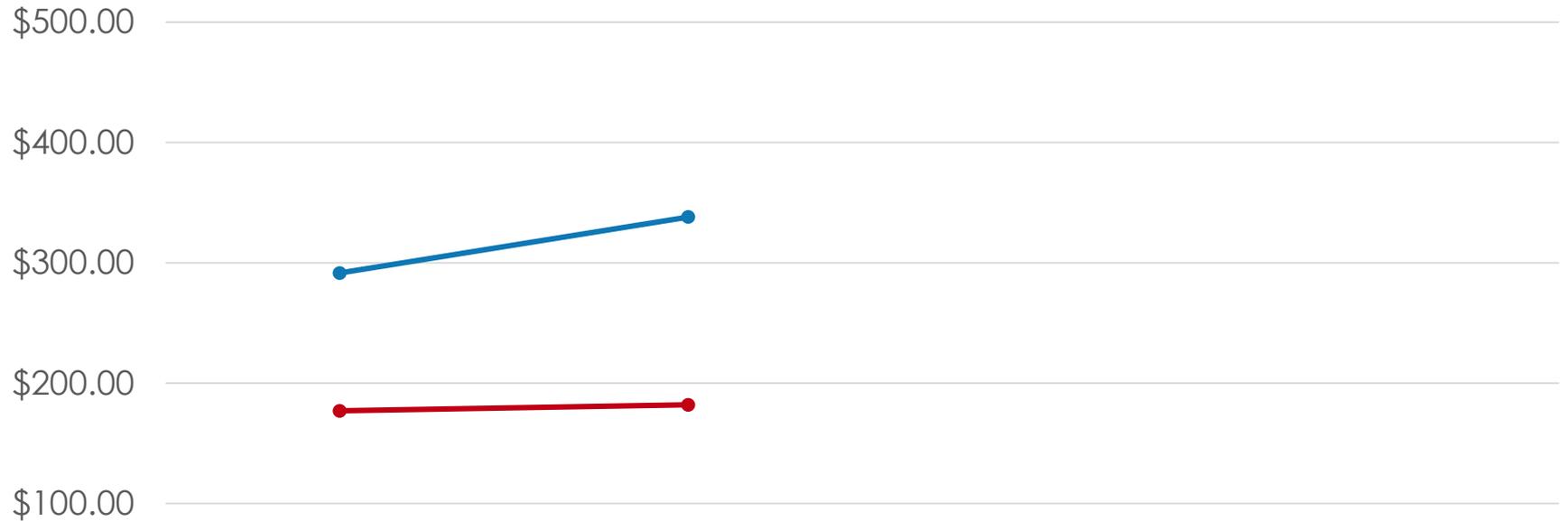
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$291.50	$338.09		
MEDIAN	$177.00	$182.00		

On-Island Expenditures

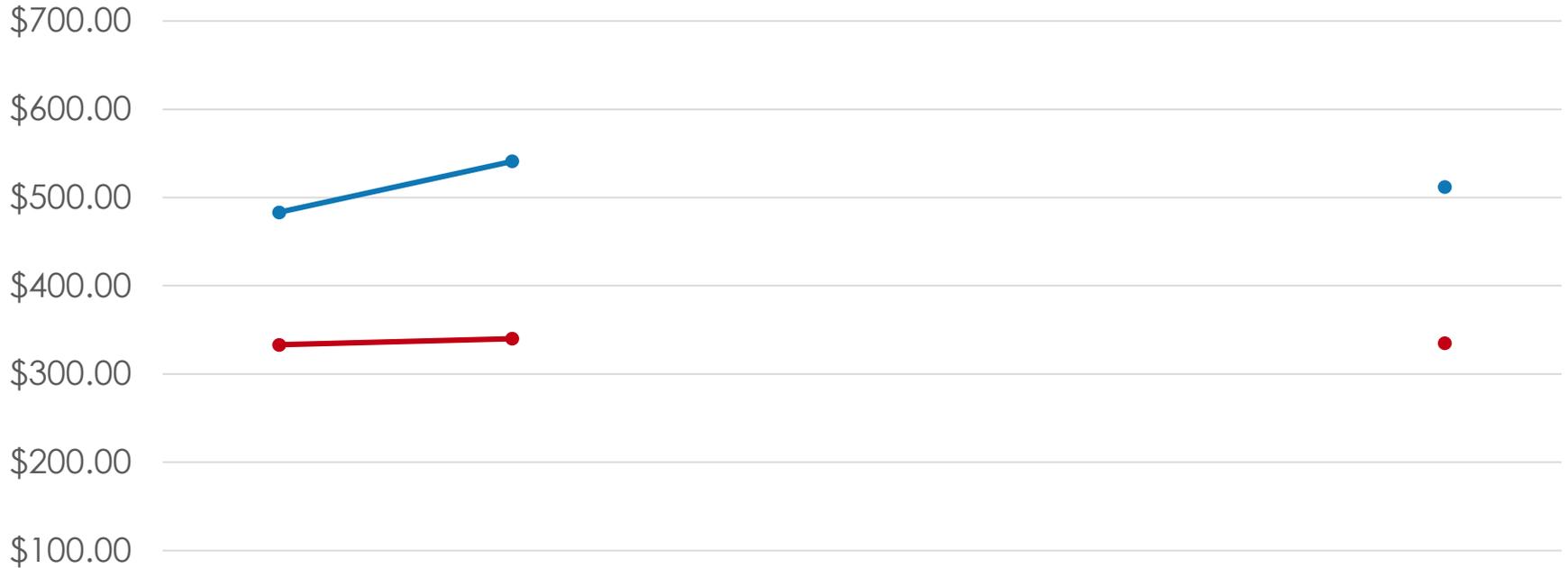- $913.28 = overall mean average prepaid expense (for entire travel party size) by respondent

- $541.06 = overall mean average <u>per person</u> prepaid expenditures

[A]

On-Island Entire Travel Party – FY2018 Tracking
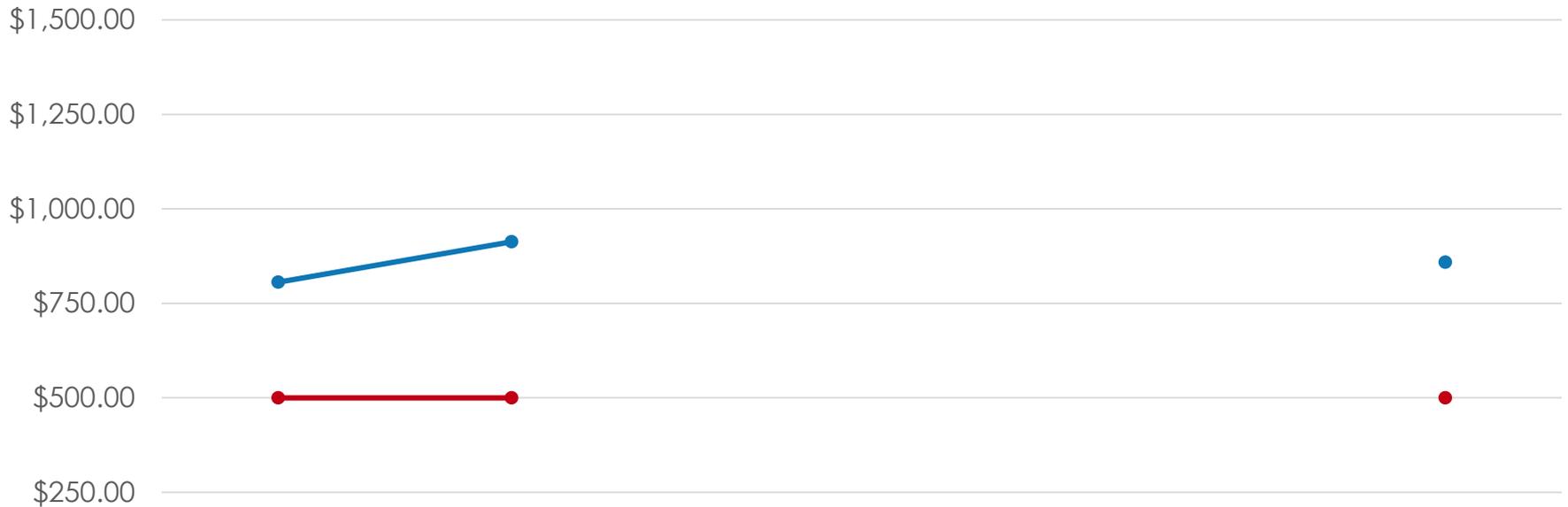
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$806.03	$913.28				$859.13
MEDIAN	$500.00	$500.00				$500.00

[A]

On-Island Per Person – FY2018 Tracking

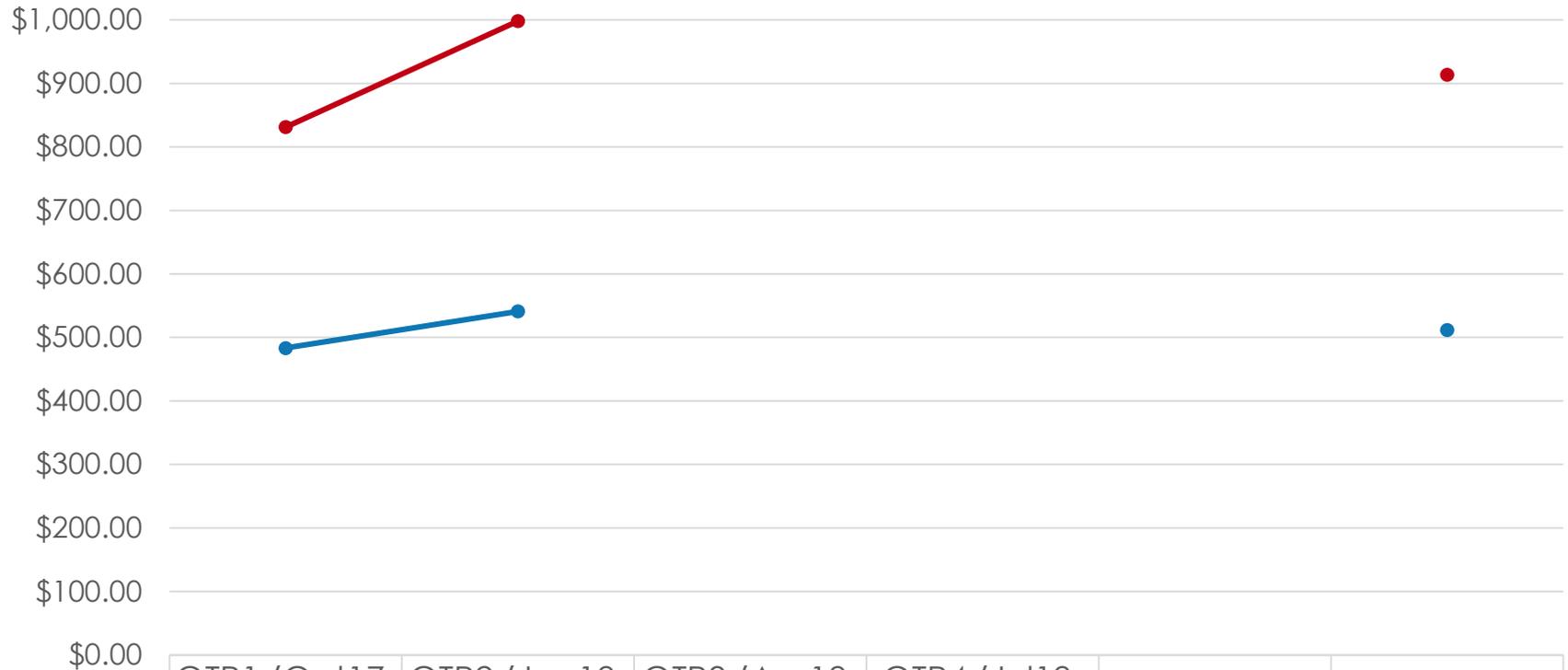|	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$483.22	$541.06				$511.86
MEDIAN	$333.00	$340.00				$335.00

[A]

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	$541.06	$557.85	$573.77	$677.60	$774.28	$558.25	$467.62	$495.18
	Median	$340	$333	$367	$358	$635	$383	$350	$300

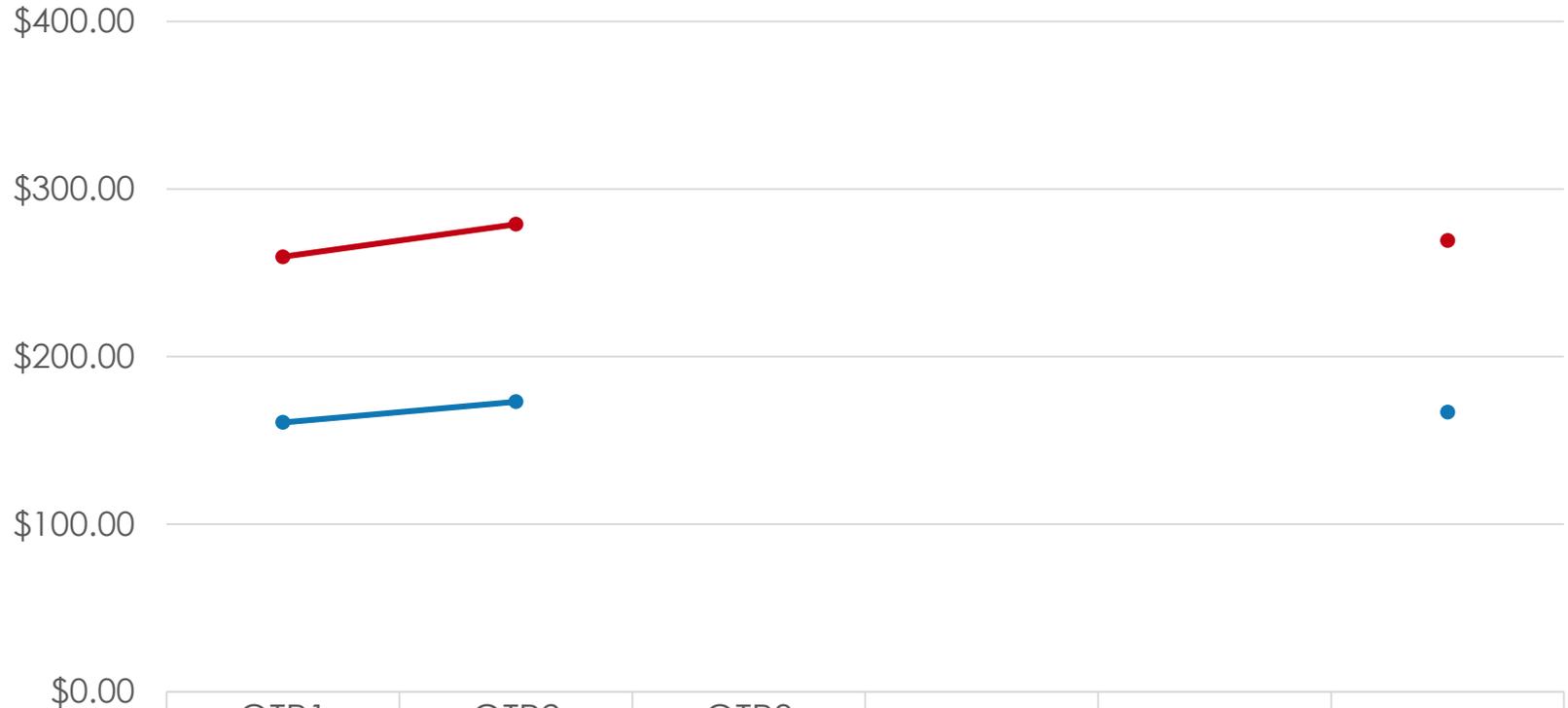Prepared by Anthology Research

[A]

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				$511.86
Prepaid	$831.21	$998.22				$913.93

[A]

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				$166.81
Travel Party	$259.55	$278.96				$269.16

[A]

On-Island Expenses by Category – MEAN Entire Travel Party

Bar chart showing mean on-island expenses by category for the entire travel party:
- F&B Hotel: $64.92
- F&B Fast Food/Conv Store: $58.54
- F&B Restaurant: $133.17
- Optional Tour: $96.70
- Gift- Self: $224.21
- Gift-Others: $140.67
- Local Trans: $29.62
- Other: $118.21

[A]

On-Island – FY2018 Tracking
Food & Beverage - Hotel

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$53.16	$64.92		
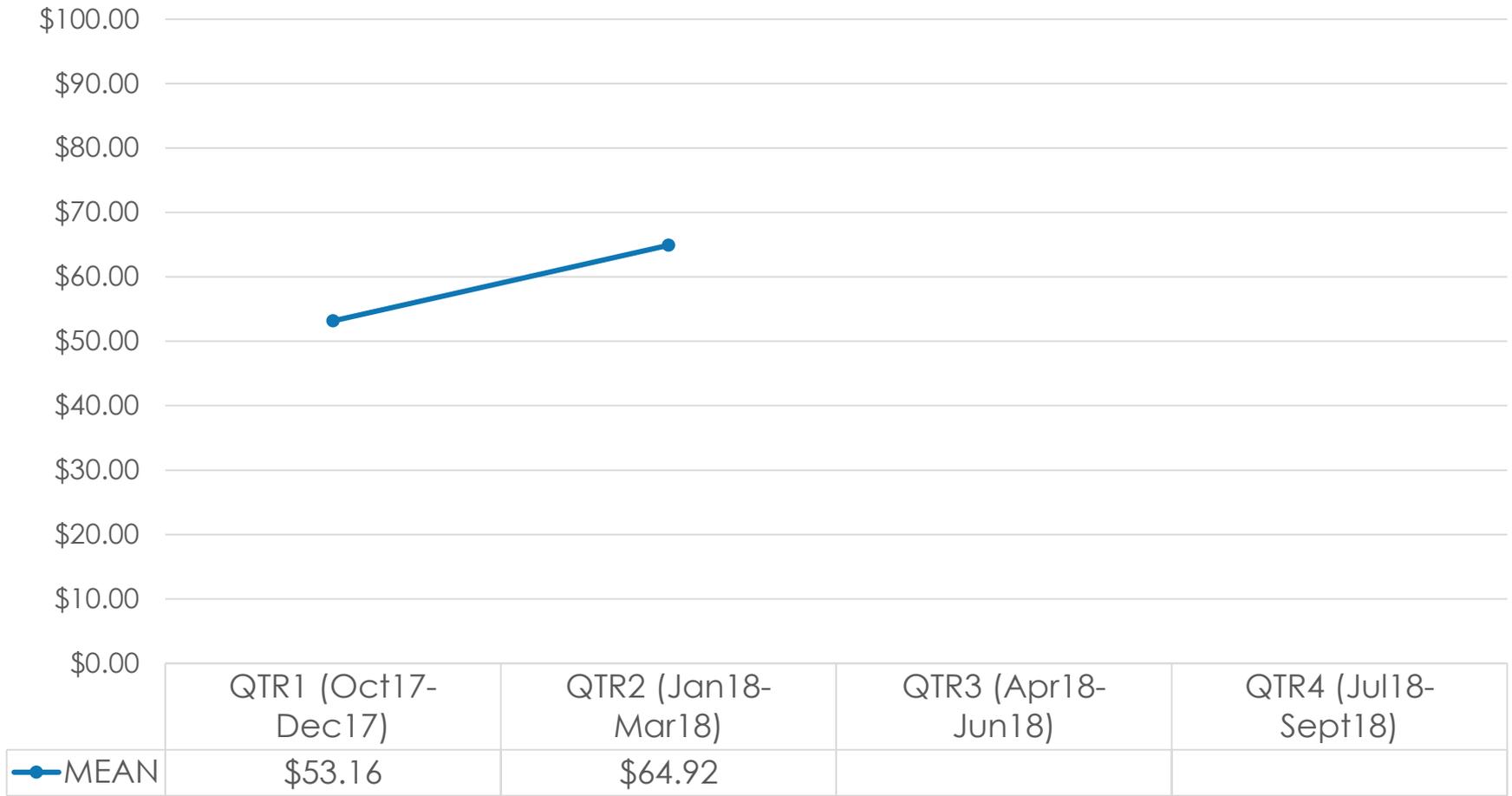
On-Island – FY2018 Tracking
Food & Beverage – Fast Food/ Convenience Store

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$65.87	$58.54		

[A]
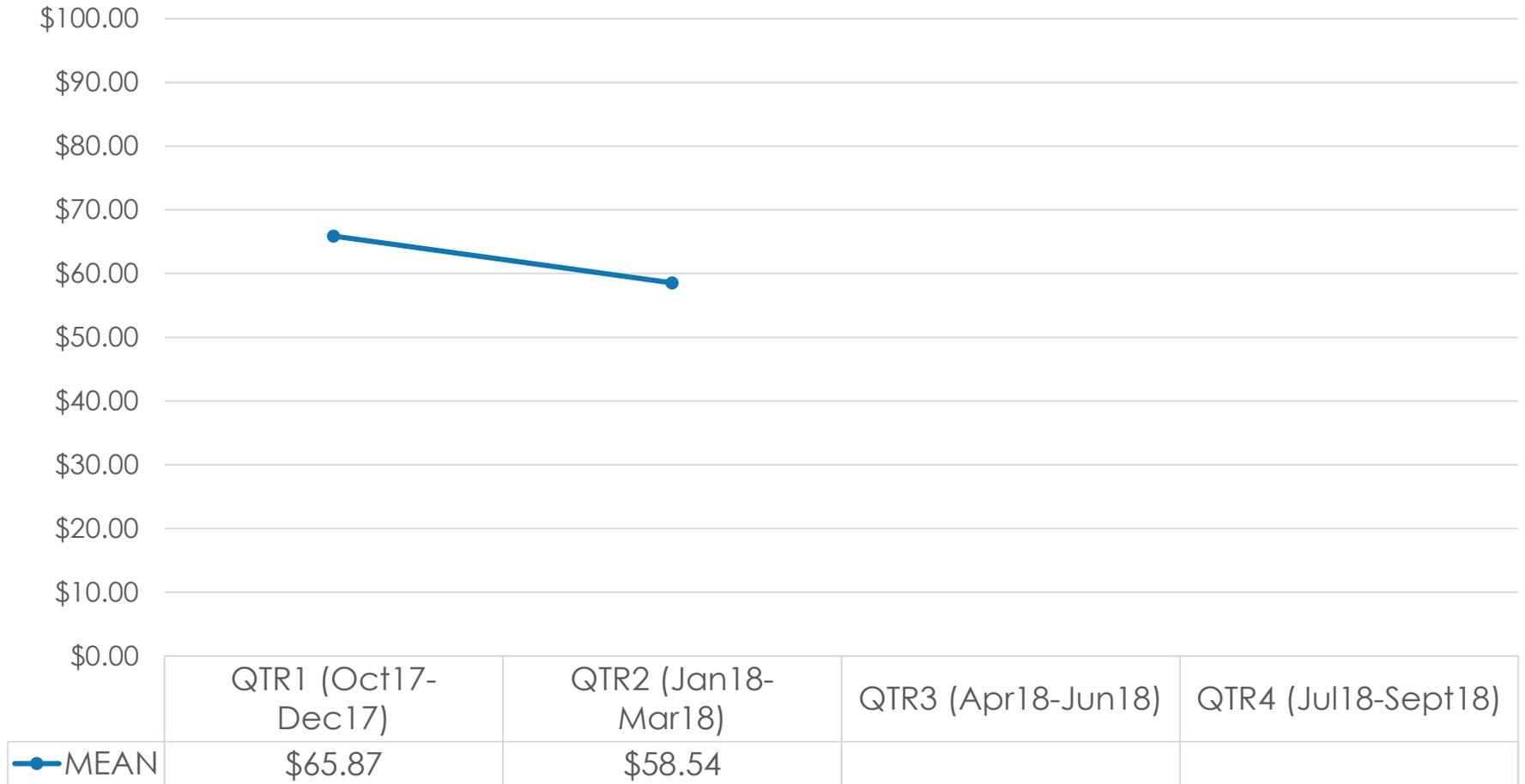
On-Island – FY2018 Tracking
Food & Beverage – Restaurant/ Drinking Est Outside Hotel

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$139.95	$133.17		

[A]
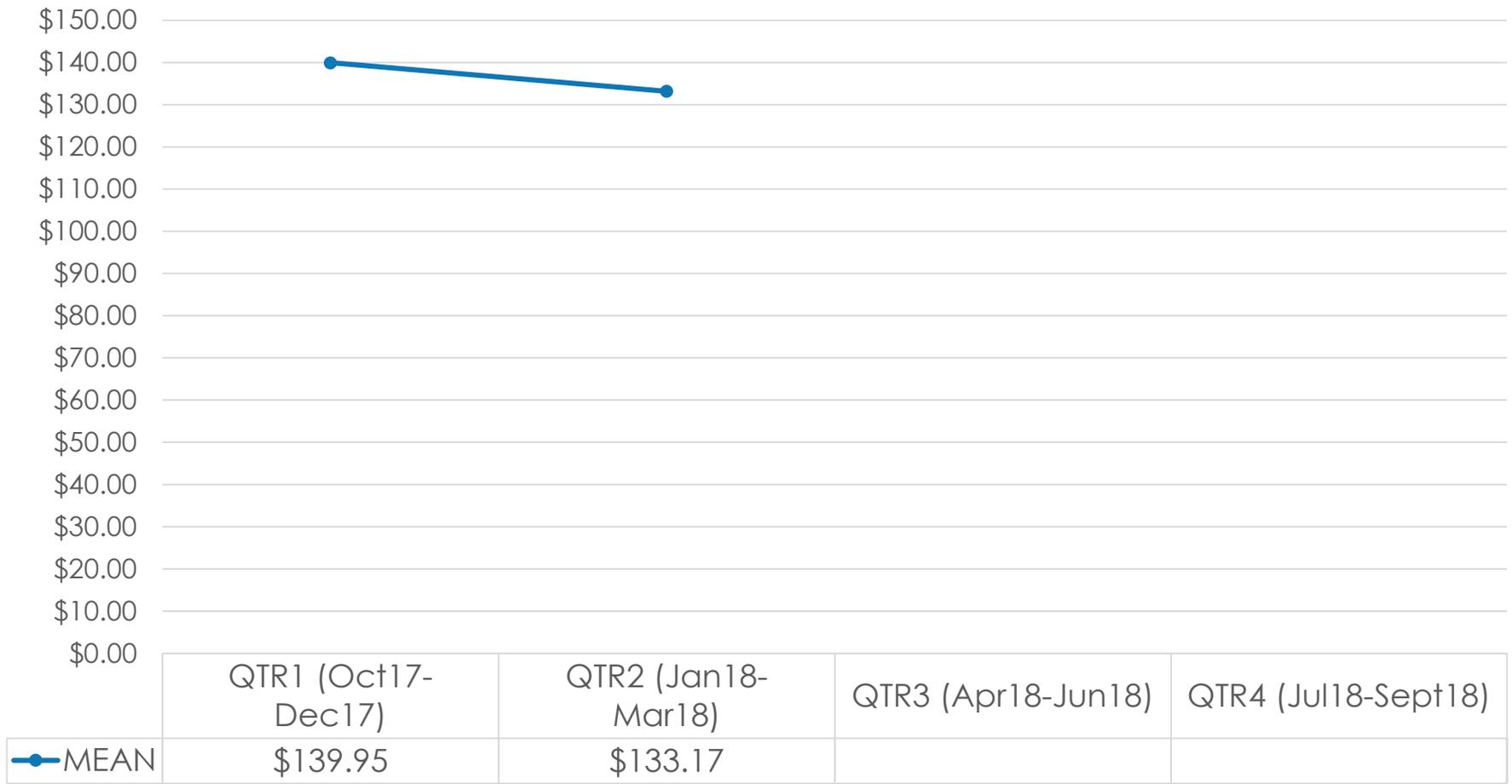
On-Island – FY2018 Tracking
Optional tour/ Activities

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$88.28	$96.70		

[A]
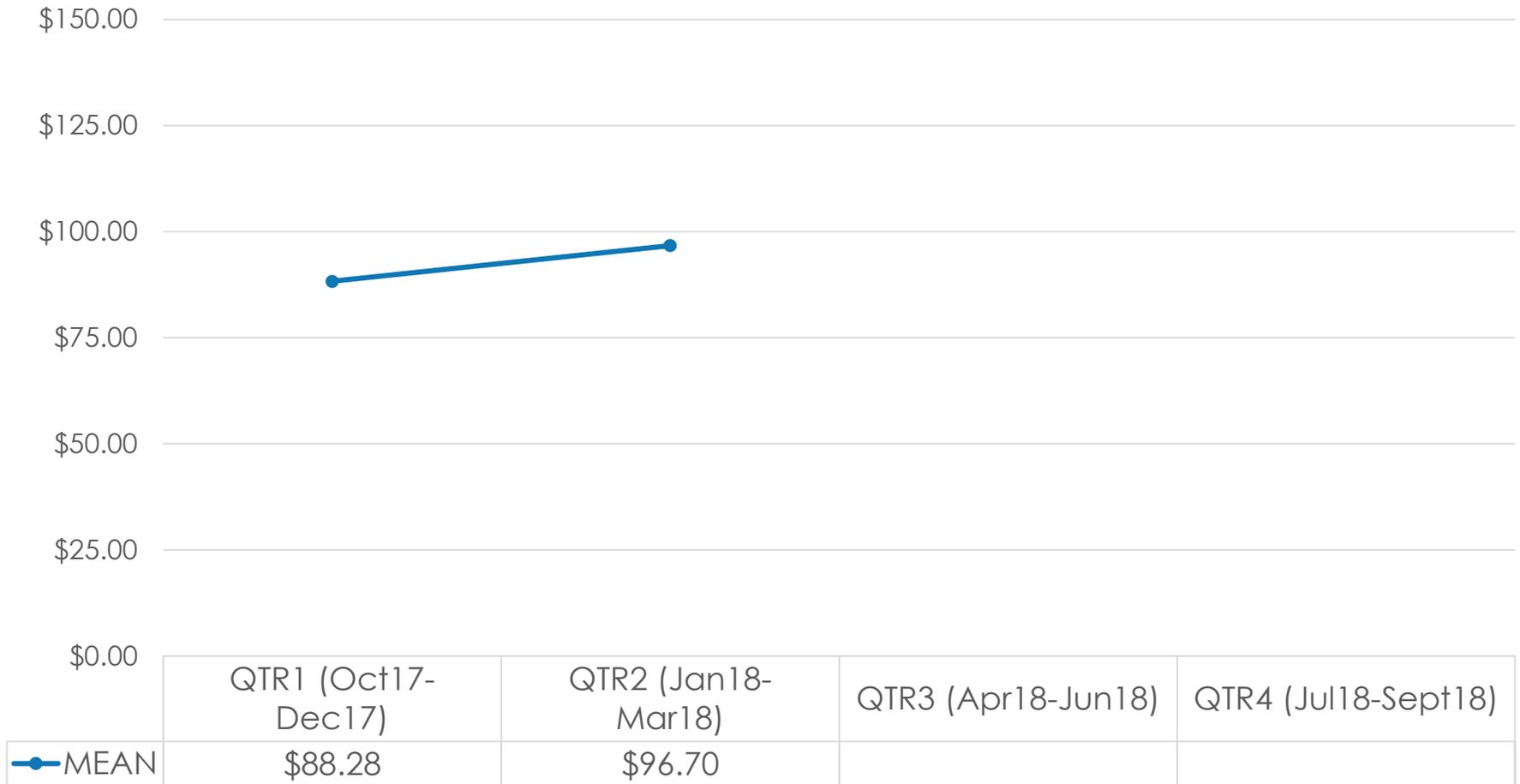
On-Island – FY2018 Tracking
Gift/ Souvenir – Self/ Companion

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$216.78	$224.21		

[A]
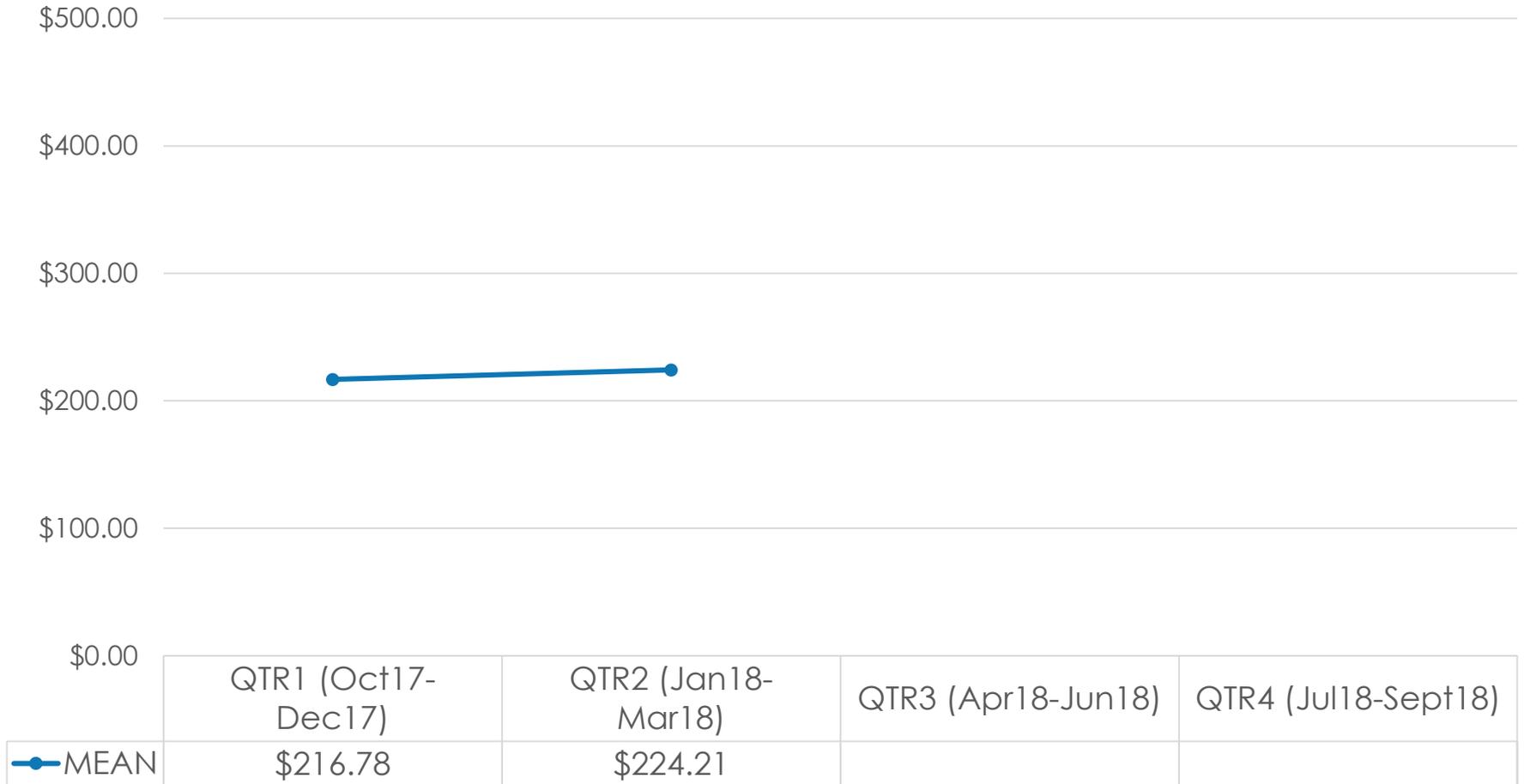
On-Island – FY2018 Tracking
Gift/ Souvenir – Friends/ Family

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$157.65	$140.67		

[A]
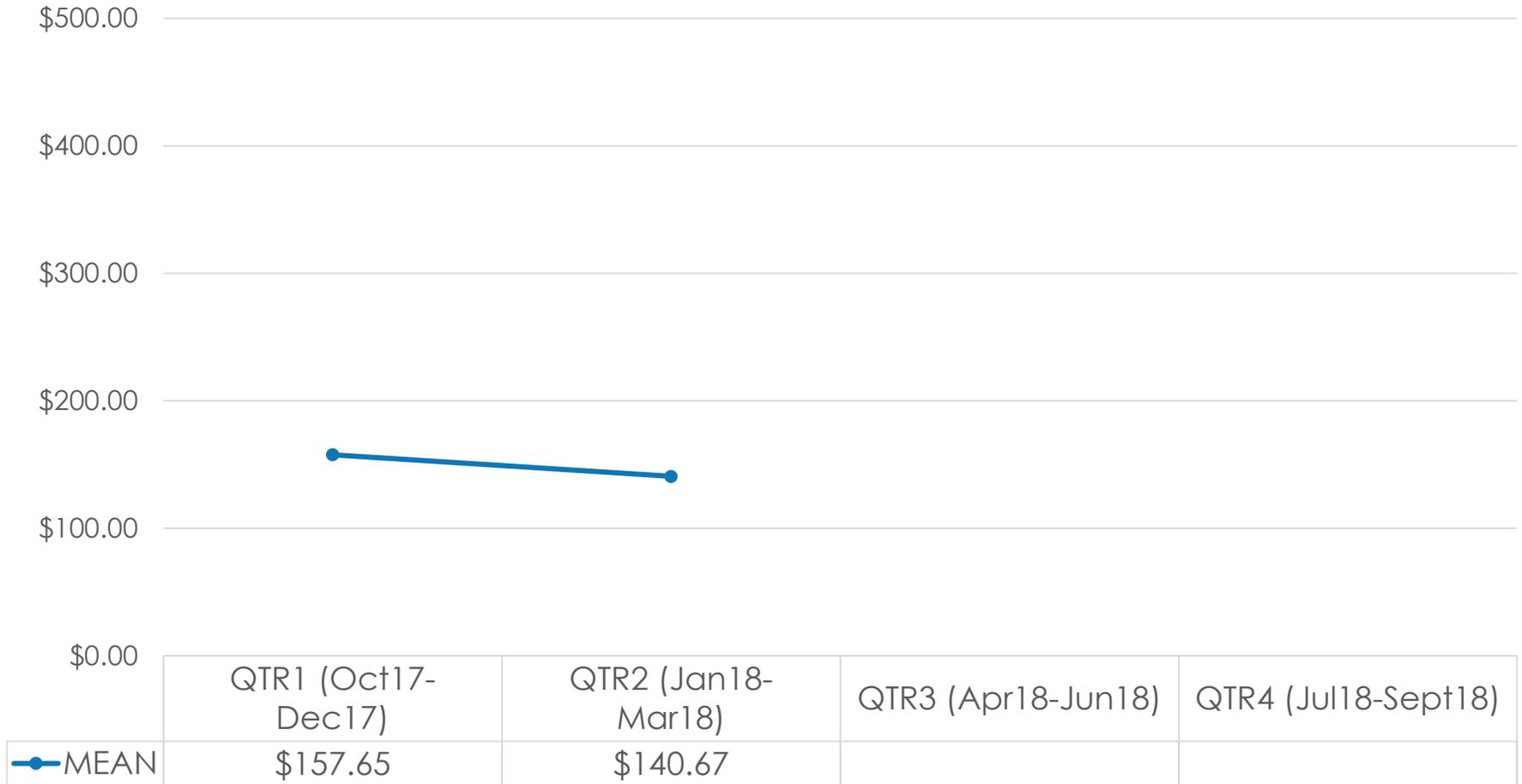
On-Island – FY2018 Tracking
Local Transportation

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$29.95	$29.62		

[A]
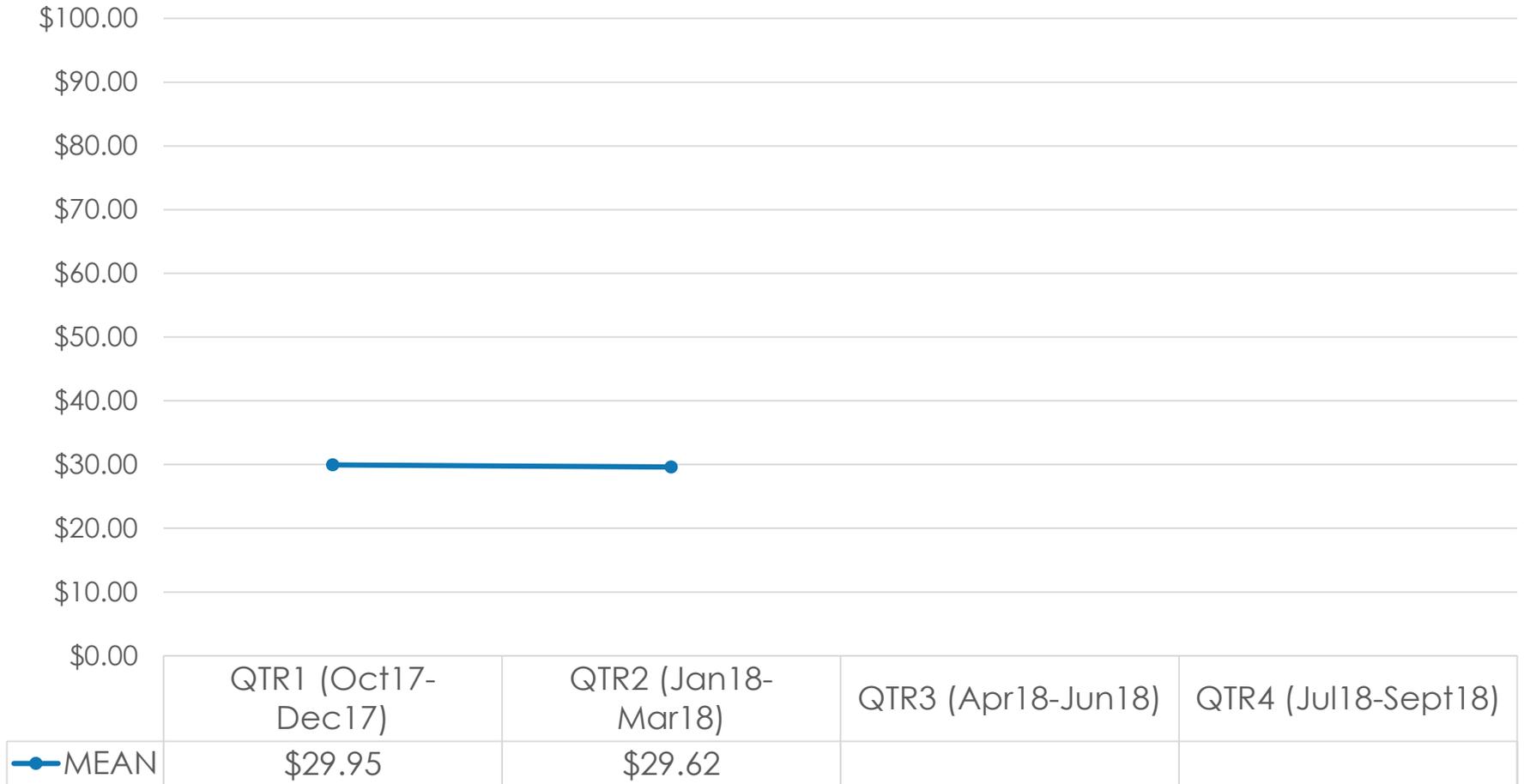
On-Island – FY2018 Tracking
Other Not Included

	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$66.96	$118.21		

[A]
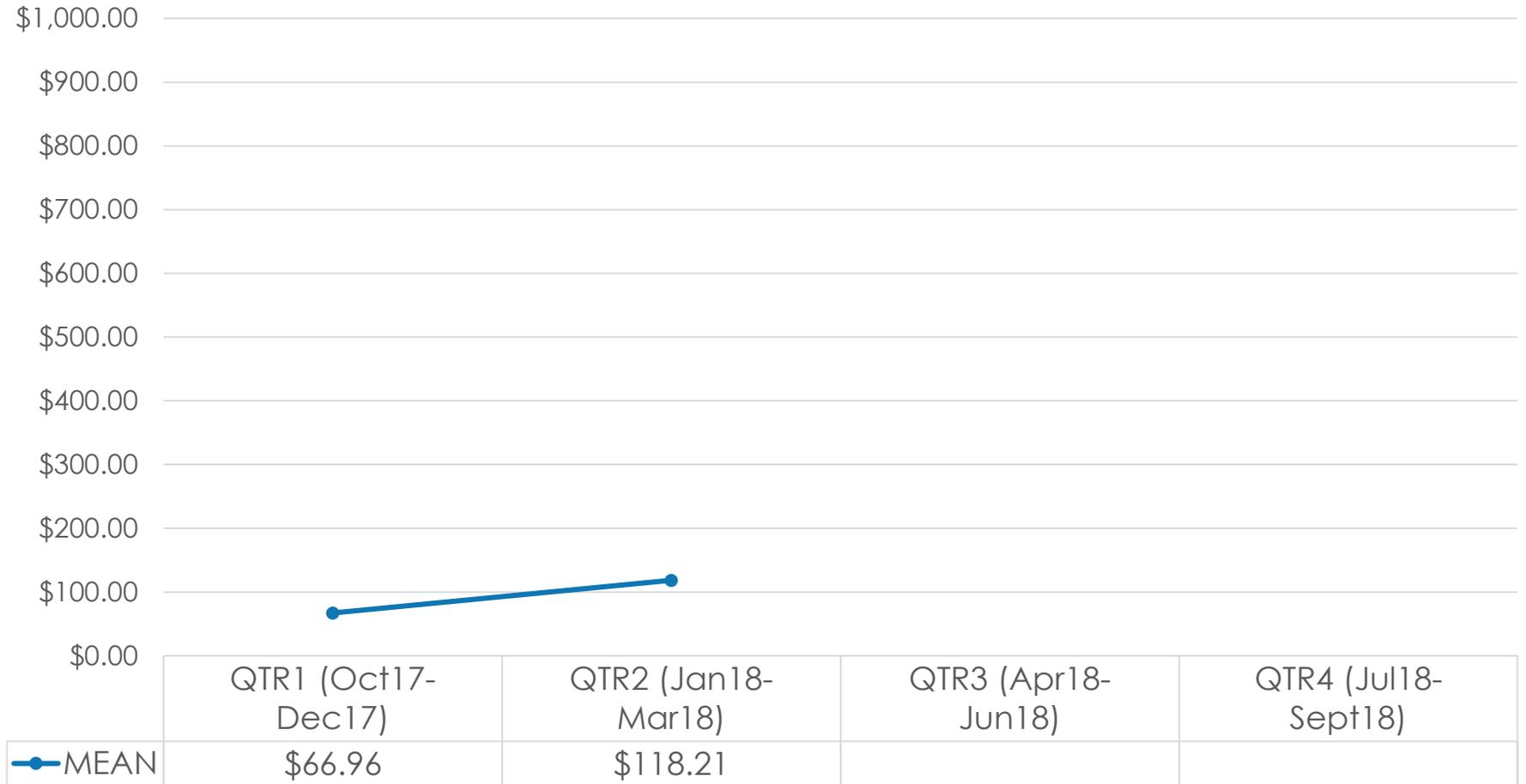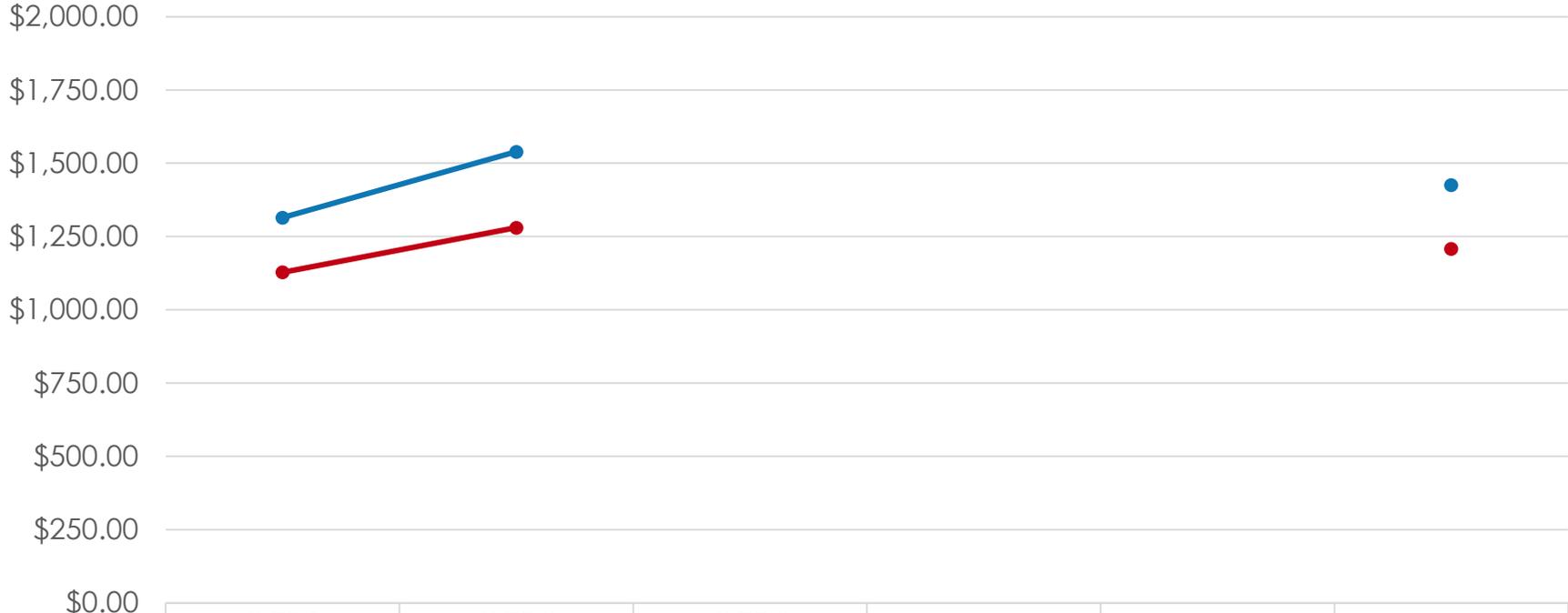
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- $1,539.31 = overall mean average prepaid & on-isle expense by respondent

[A]

TOTAL Per Person Expenditures – FY2018 Tracking

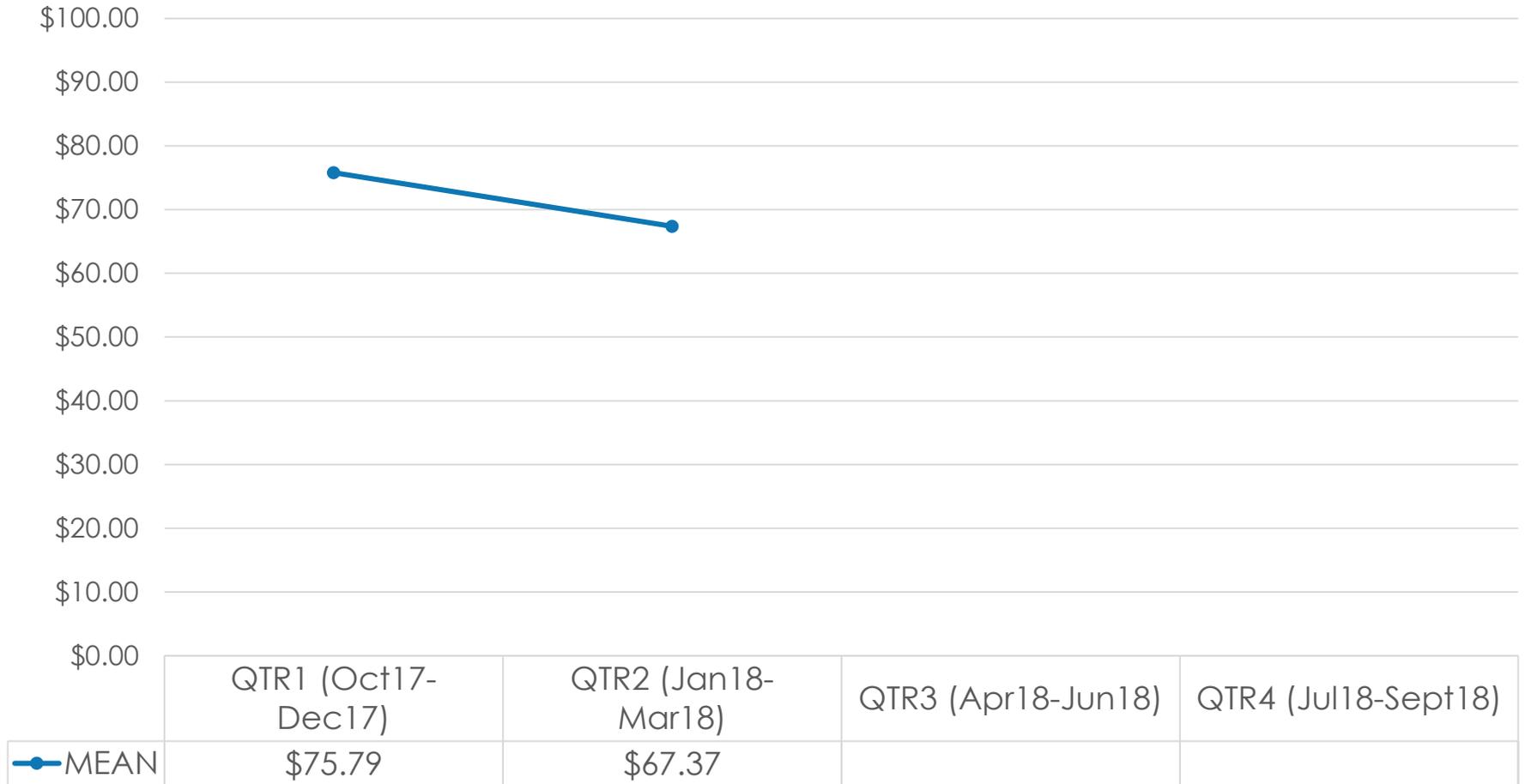|	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)		YTD
MEAN	$1,314.80	$1,539.31				$1,426.00
MEDIAN	$1,128.00	$1,280.00				$1,208.00

[A]

TOTAL Per Person Expenditures – Key Segments

GVB EXIT SURVEY
TOTAL PER PERSON SPENDIN

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	$1,539.31	$1,789.65	$1,611.82	$1,631.24	$2,039.89	$1,403.82	$1,954.17	$1,324.64
	Median	$1,280	$1,510	$1,336	$1,256	$1,895	$1,210	$1,633	$1,163

Prepared by Anthology Research

[A]

GUAM AIRPORT EXPENDITURE – FY2018 Tracking

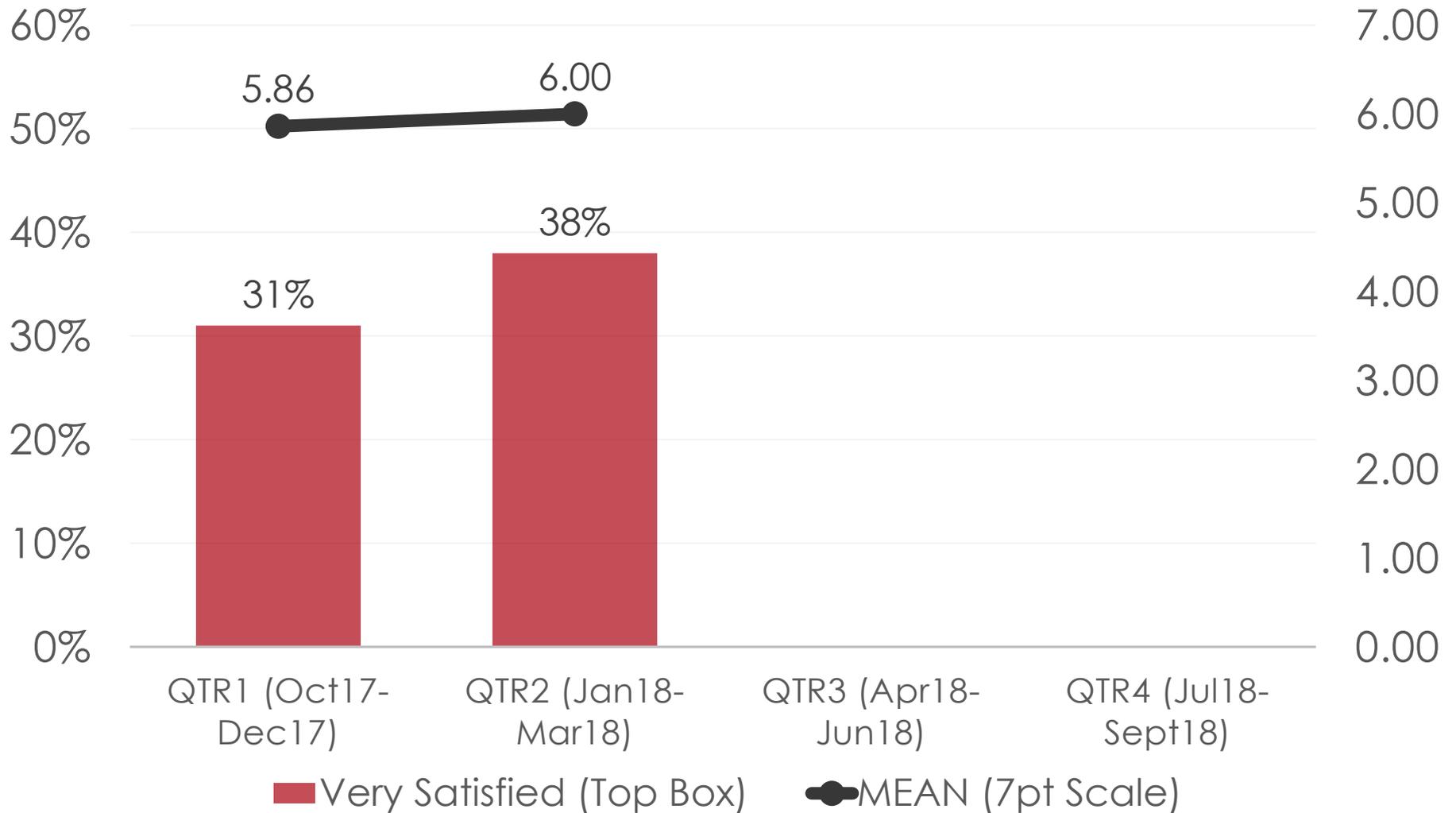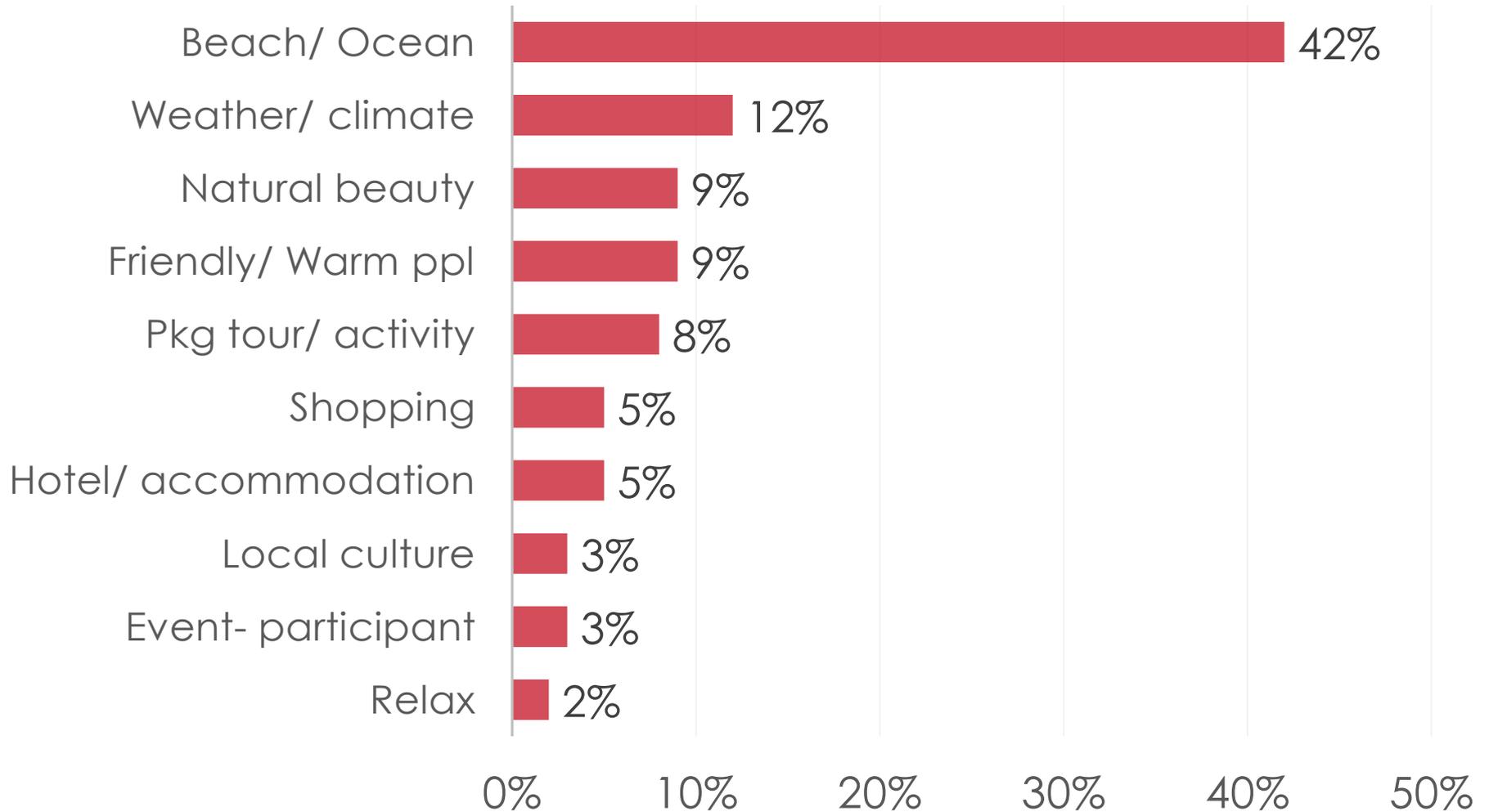|	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
MEAN	$75.79	$67.37		

[A]

SECTION 4

VISITOR SATISFACTION BEHAVIOR

[A]

OVERALL SATISFACTION

POSITIVE ASPECTS OF TRIP

Category	Percentage
Beach/ Ocean	42%
Weather/ climate	12%
Natural beauty	9%
Friendly/ Warm ppl	9%
Pkg tour/ activity	8%
Shopping	5%
Hotel/ accommodation	5%
Local culture	3%
Event- participant	3%
Relax	2%

[A]

NEGATIVE ASPECTS OF TRIP

Aspect	Percentage
Nothing	32%
Expensive/ Cost	15%
Immigration	9%
Accommodations	8%
Food- quality	7%
Food- variety	5%
Ground trans	5%
Language	5%
Public bathrooms	3%
Activities- variety	3%

[A]
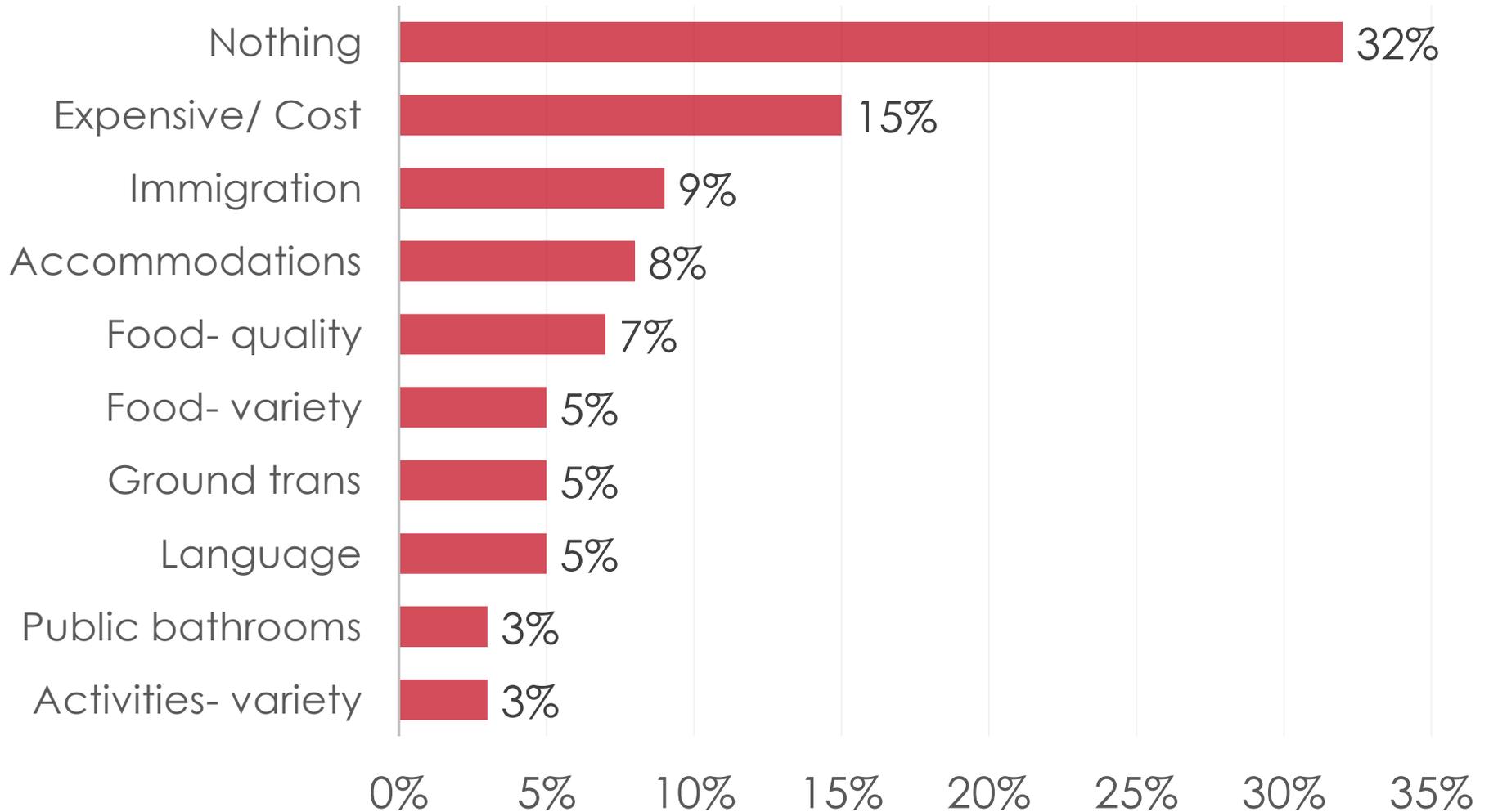
Guam was better than expected

80% — 7.00

5.95 · 6.11

70%

60% — 5.00

49%

50%

40% — 4.00

40%

30% — 3.00

20% — 2.00

10% — 1.00

0% — 0.00

QTR1 (Oct17-Dec17) · QTR2 (Jan18-Mar18) · QTR3 (Apr18-Jun18) · QTR4 (Jul18-Sept18)

■ Strongly agree   ●—● MEAN (7pt Scale)

[A]
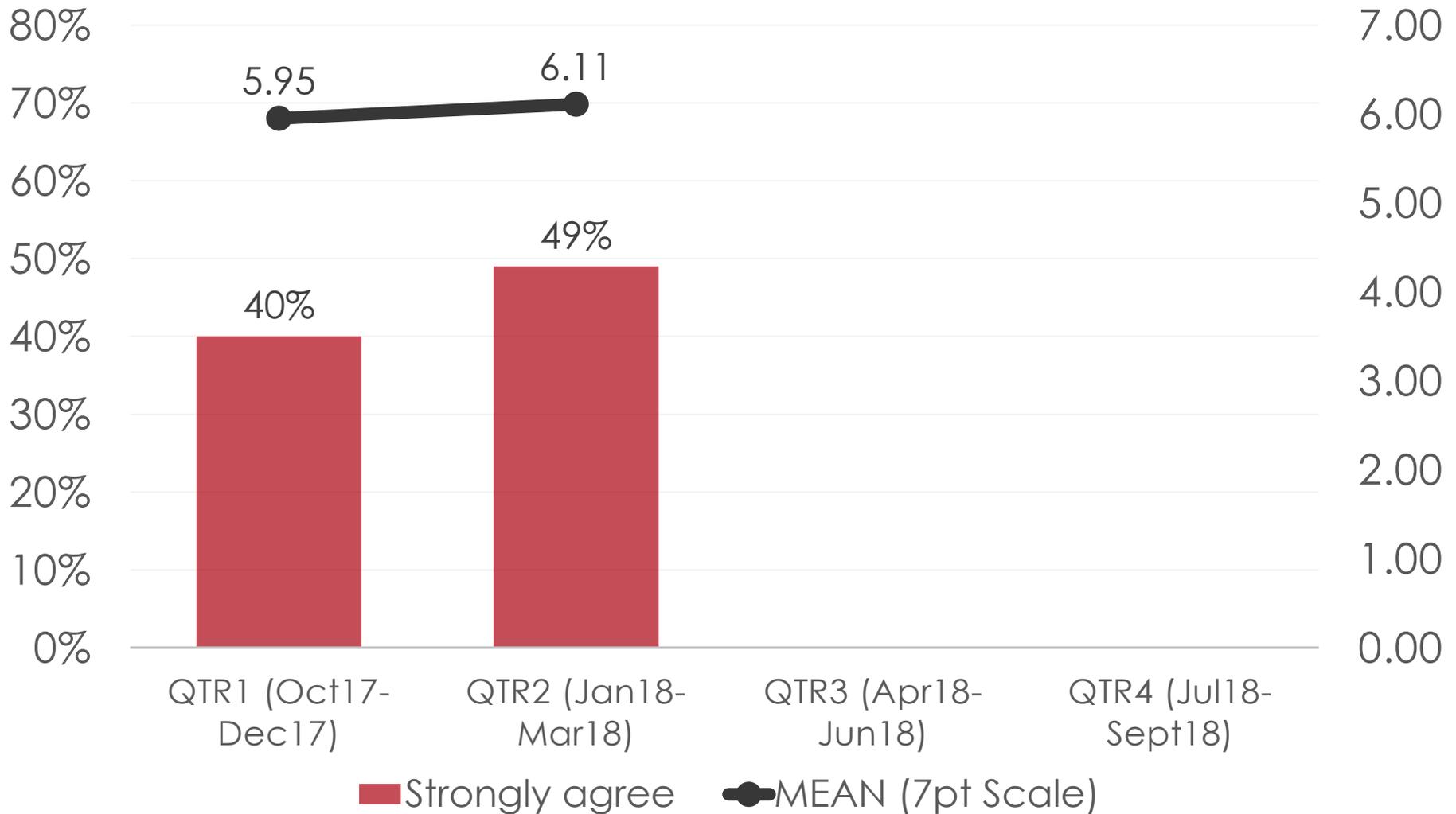
I had no communication problems

Chart showing "Strongly agree" (red bars) and "MEAN (7pt Scale)" (black line) across quarters:

- QTR1 (Oct17-Dec17): 31%, Mean 5.63
- QTR2 (Jan18-Mar18): 39%, Mean 5.84
- QTR3 (Apr18-Jun18): (no data)
- QTR4 (Jul18-Sept18): (no data)

Legend: Strongly agree | MEAN (7pt Scale)

[A]
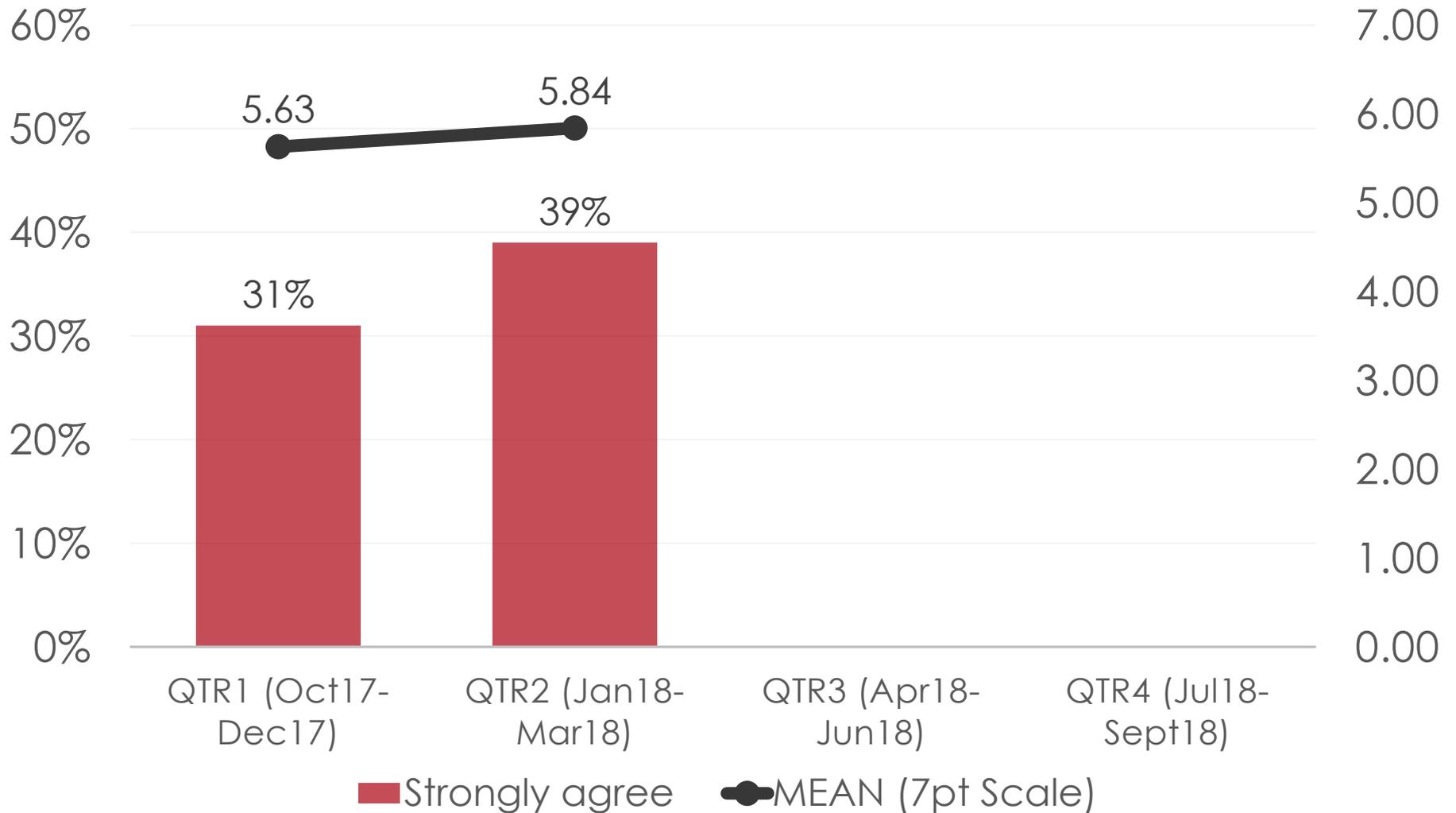
I will recommend Guam to friends

5.92   6.16

40%   53%

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

■ Strongly agree   ●—MEAN (7pt Scale)

[A]
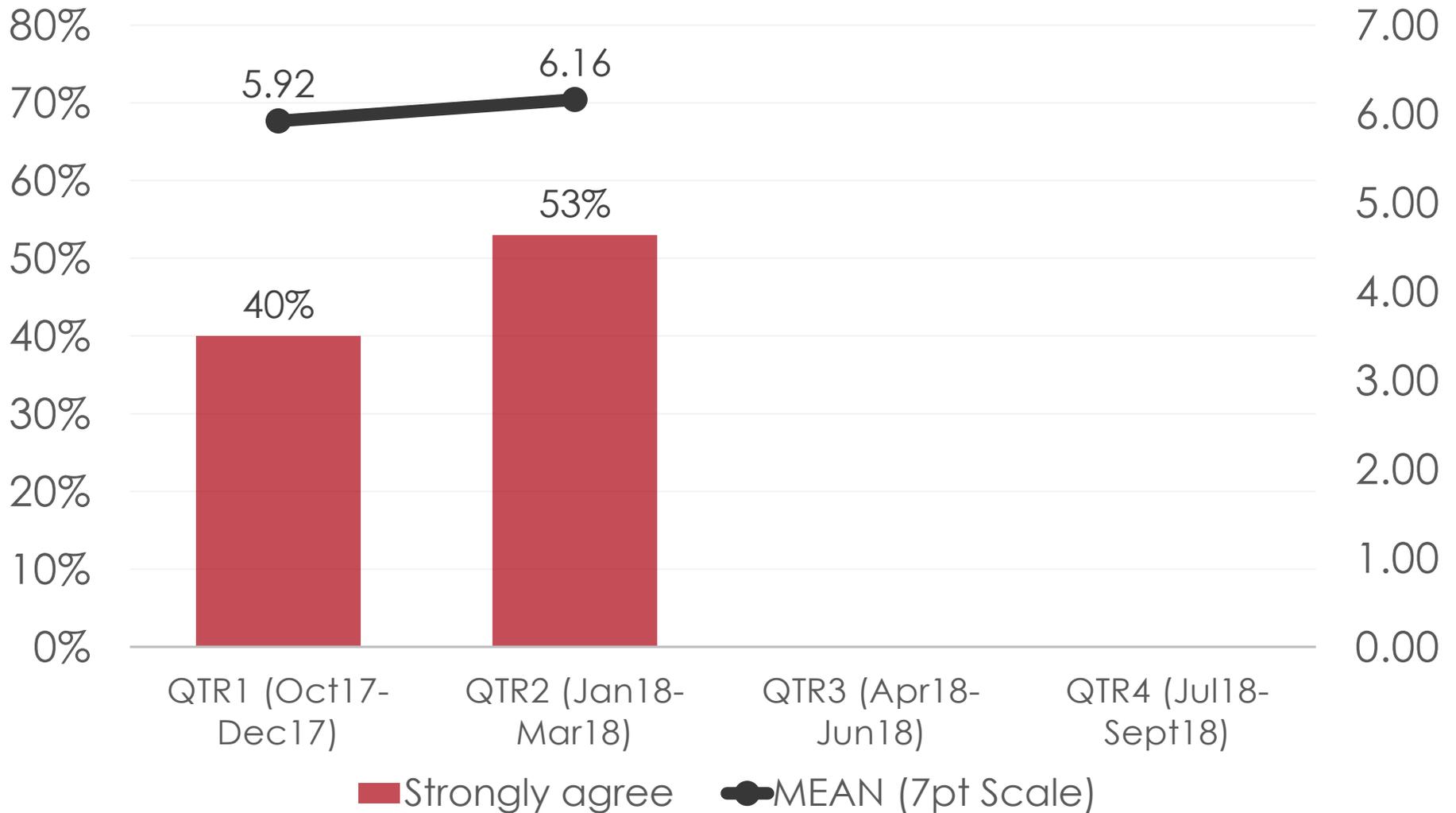
Sites on Guam were attractive
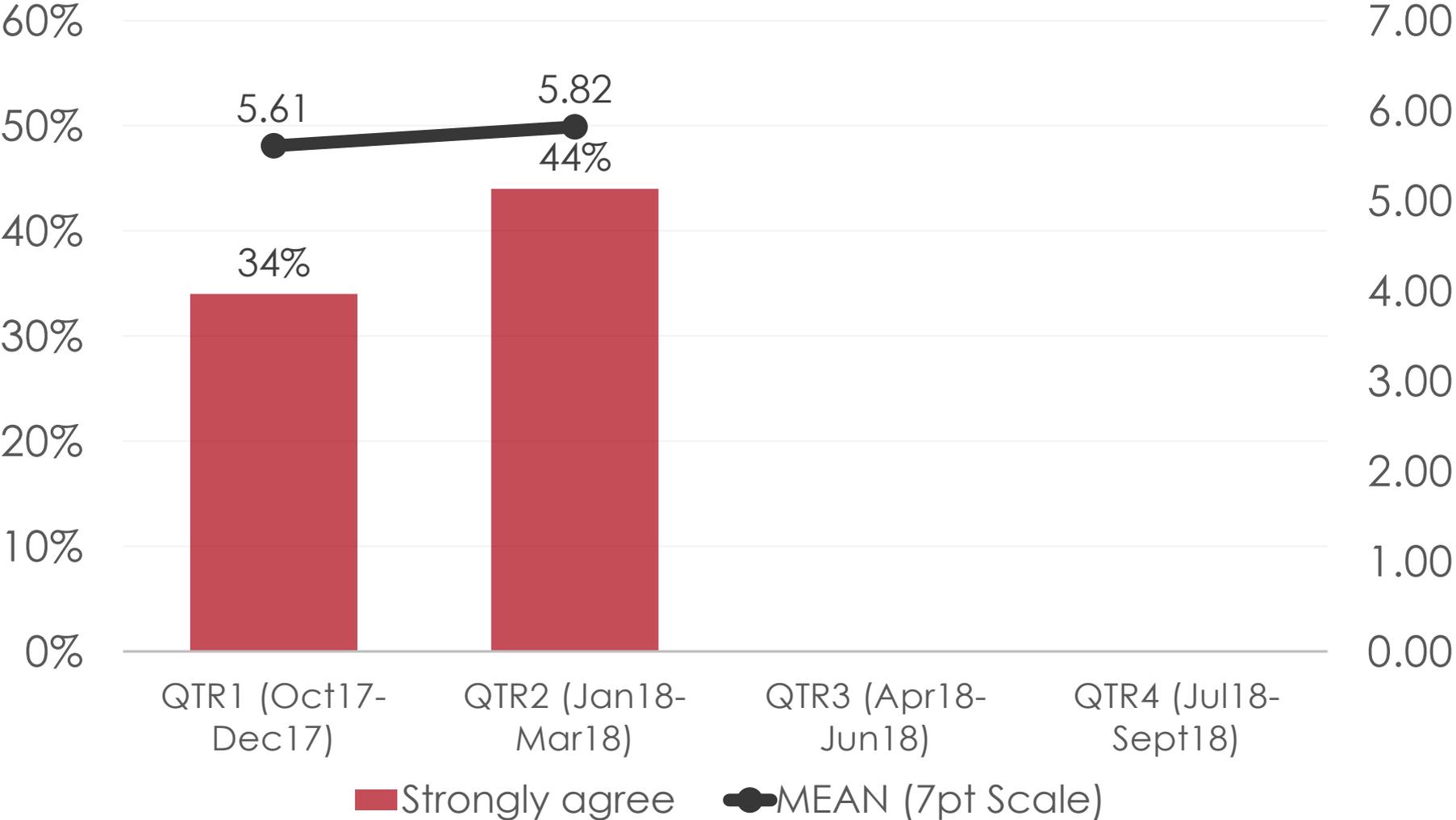
I plan to visit Guam again

5.94   6.12

80%   7.00

70%

60%   56%

49%

50%

40%

30%

20%

10%

0%   0.00

QTR1 (Oct17-Dec17)   QTR2 (Jan18-Mar18)   QTR3 (Apr18-Jun18)   QTR4 (Jul18-Sept18)

■ Strongly agree   ●—MEAN (7pt Scale)
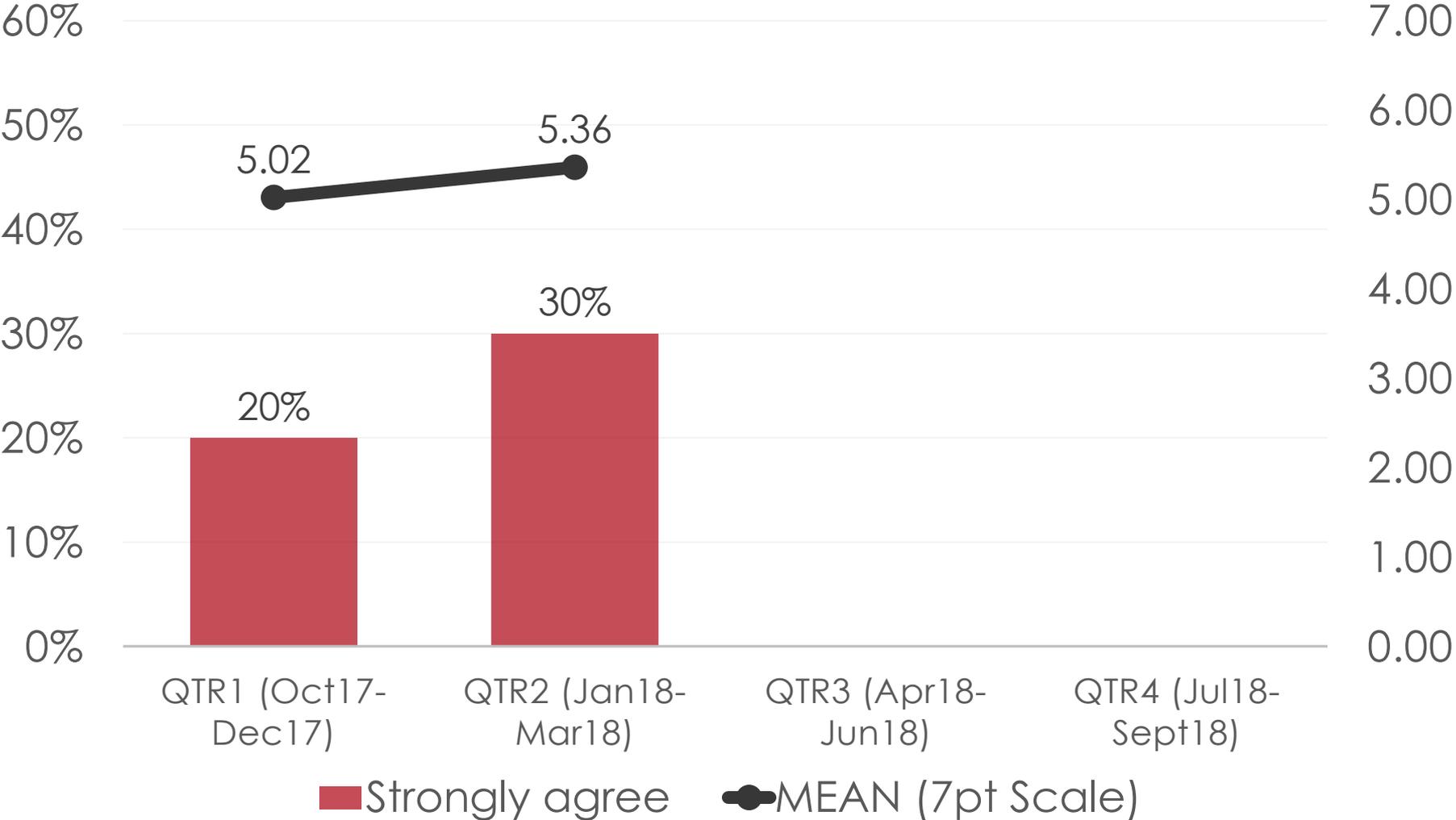
[A]
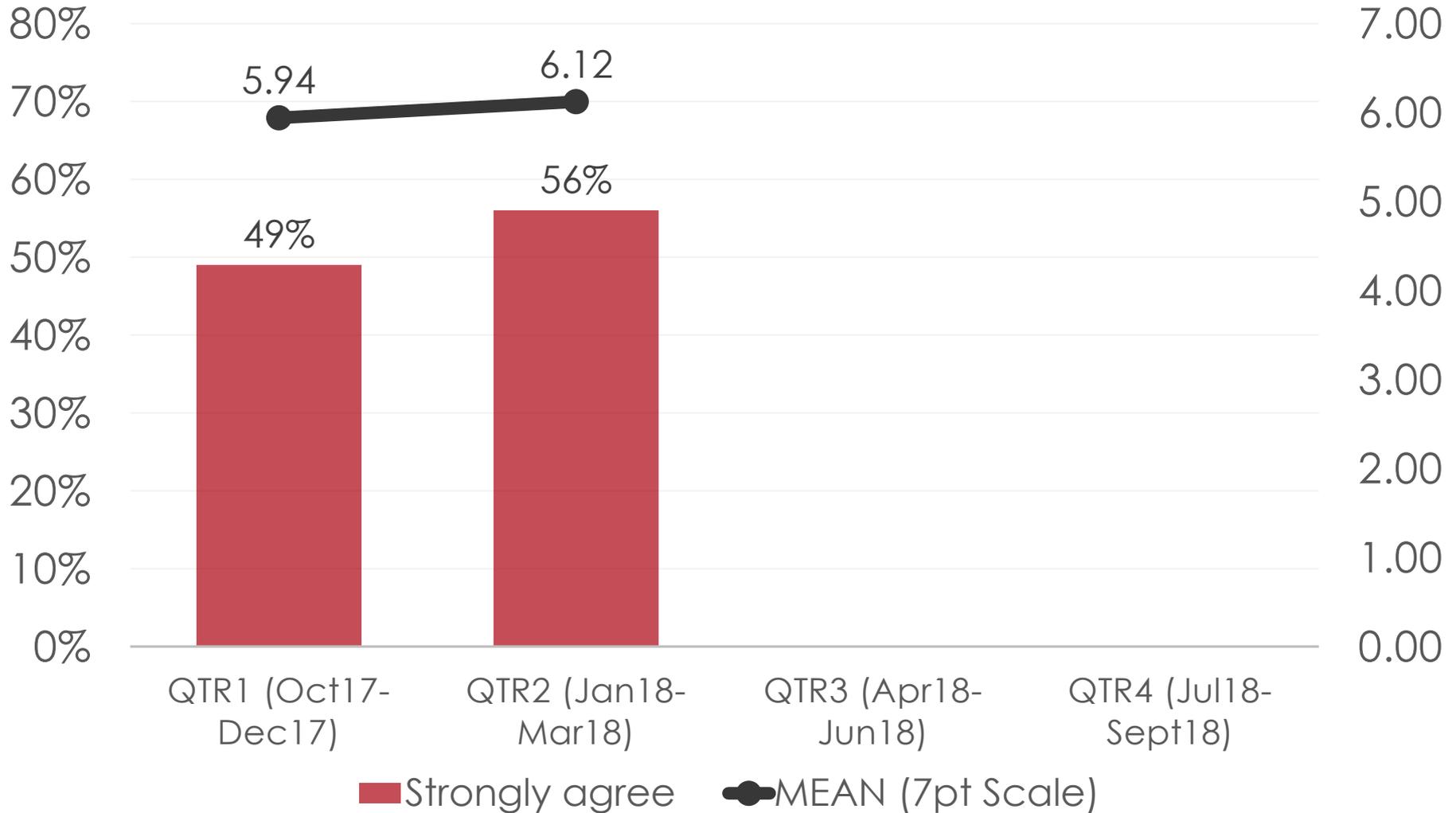
Not enough night time activities
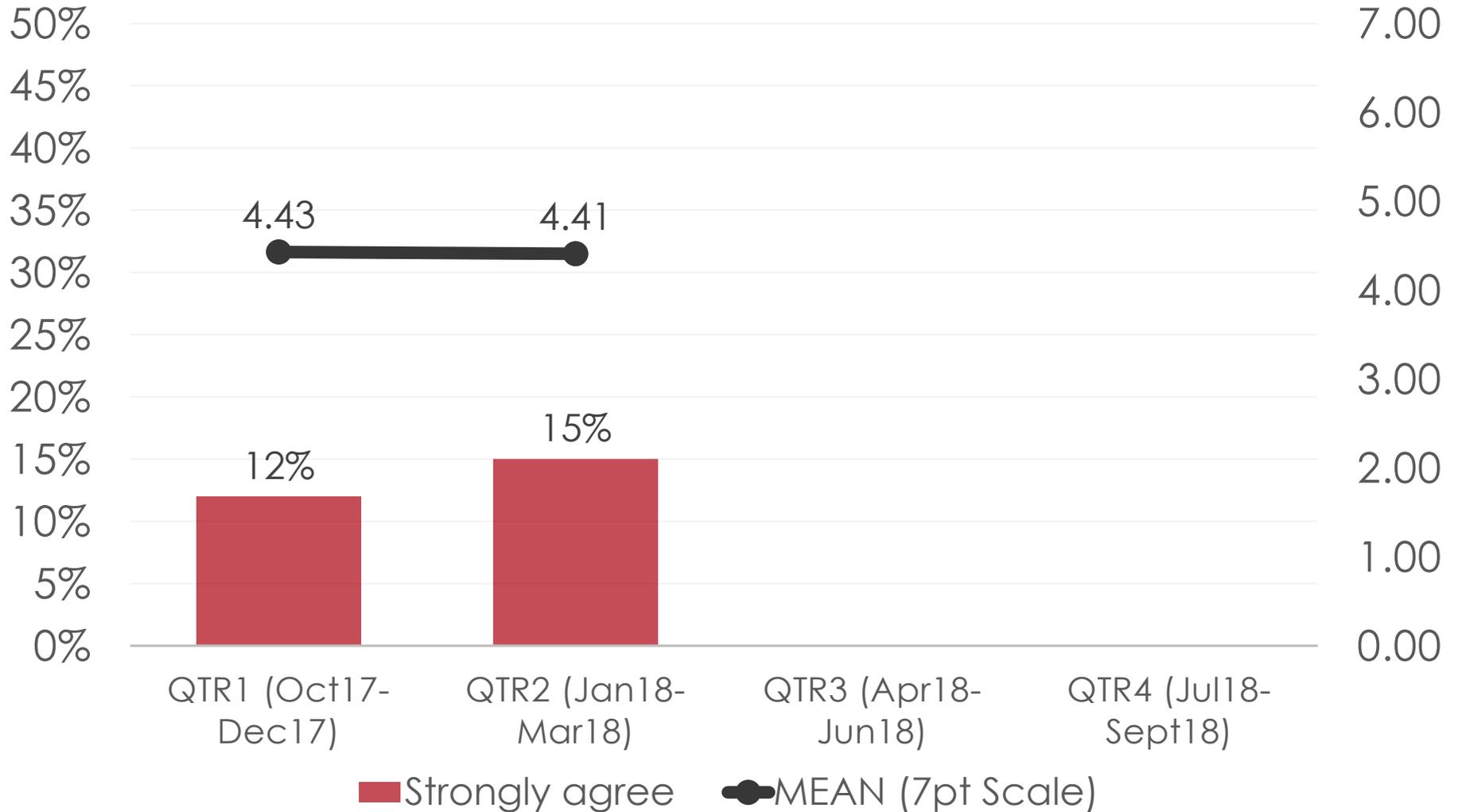
Tour guides were professional

Tour drivers were professional

60%

50%

5.02   5.36

40%

30%

20%   20%   30%

10%

0%

QTR1 (Oct17-   QTR2 (Jan18-   QTR3 (Apr18-   QTR4 (Jul18-
Dec17)   Mar18)   Jun18)   Sept18)

■ Strongly agree   ●— MEAN (7pt Scale)

7.00

6.00

5.00

4.00

3.00

2.00

1.00

0.00

[A]

Taxi drivers were professional

Taxis were clean

[A]

Guam airport was clean

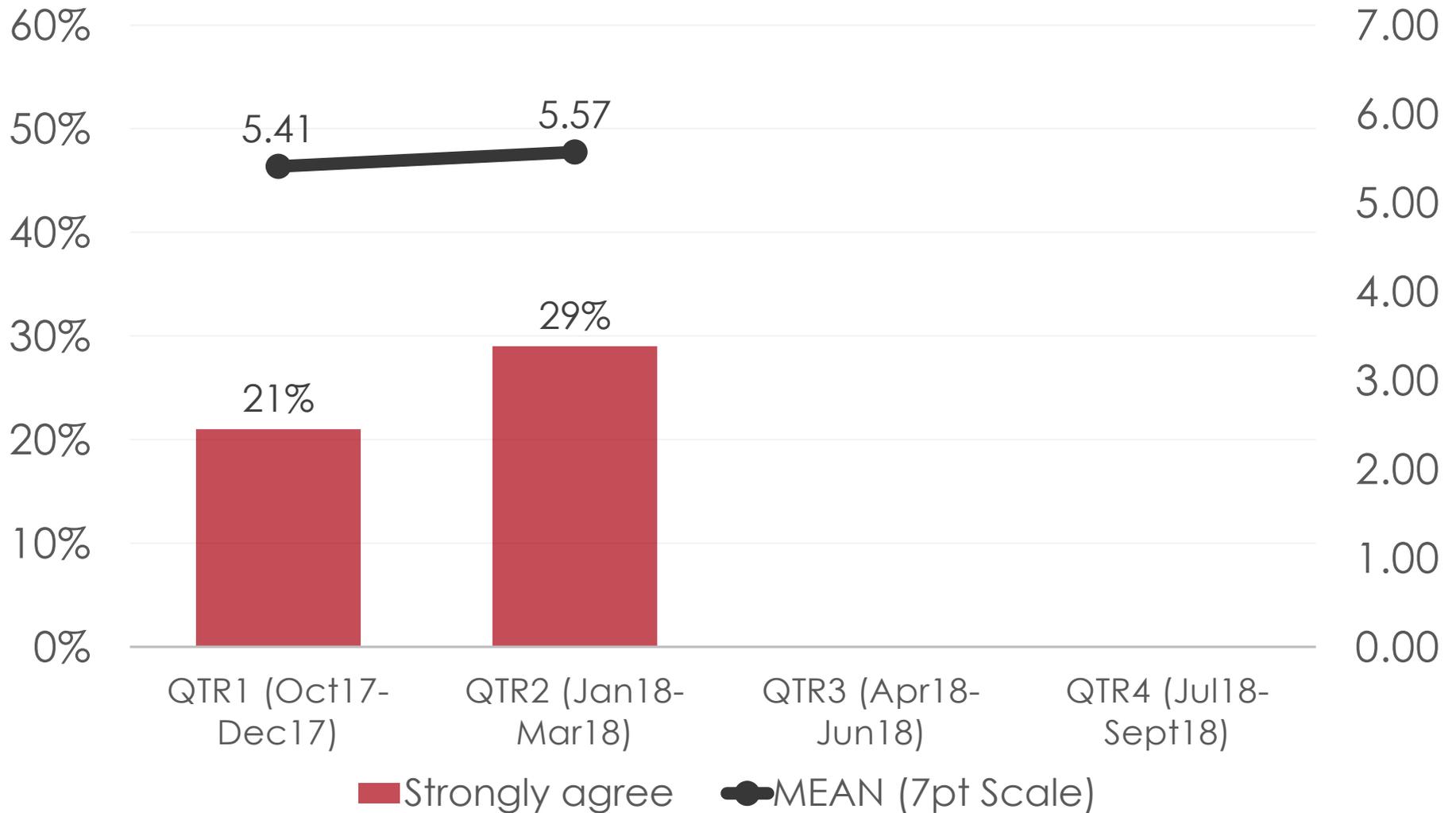Chart showing "Strongly agree" percentages and MEAN (7pt Scale) by quarter:
- QTR1 (Oct17-Dec17): 21%, MEAN 5.41
- QTR2 (Jan18-Mar18): 29%, MEAN 5.57
- QTR3 (Apr18-Jun18): (no data)
- QTR4 (Jul18-Sept18): (no data)

Legend: Strongly agree | MEAN (7pt Scale)

[A]

Ease of getting around

Chart showing "Ease of getting around" by quarter.

- QTR1 (Oct17-Dec17): Strongly agree 20%, MEAN (7pt Scale) 5.19
- QTR2 (Jan18-Mar18): Strongly agree 24%, MEAN (7pt Scale) 5.34
- QTR3 (Apr18-Jun18): no data
- QTR4 (Jul18-Sept18): no data

Legend: ■ Strongly agree ●— MEAN (7pt Scale)

[A]

Safety walking around at night

Legend: Strongly agree (bar) — MEAN (7pt Scale) (line)

Data points:
- QTR1 (Oct17-Dec17): 13% strongly agree, MEAN 5.00
- QTR2 (Jan18-Mar18): 18% strongly agree, MEAN 5.10
- QTR3 (Apr18-Jun18): —
- QTR4 (Jul18-Sept18): —

[A]

Price of things on Guam

Chart showing:
- Y-axis (left): percentage 0% to 60%
- Y-axis (right): 0.00 to 7.00
- QTR1 (Oct17-Dec17): Strongly agree 11%, MEAN 4.20
- QTR2 (Jan18-Mar18): Strongly agree 14%, MEAN 4.52
- QTR3 (Apr18-Jun18): no data
- QTR4 (Jul18-Sept18): no data

Legend: ▬ Strongly agree ⬤ MEAN (7pt Scale)

[A]

GENERAL SATISFACTION –
Quality/ Cleanliness

Chart showing "Very Satisfied (Top Box)" percentages and "MEAN (7pt Scale)" values by category:

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Beaches/ Parks	31%	5.62
Air/ Sky	29%	5.56
Parks	19%	5.24
Landscape Tumon	43%	5.94
Landscape Guam	47%	6.04
Ground Handler	26%	5.29
Transportation vehicle	19%	4.97

Legend: Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]
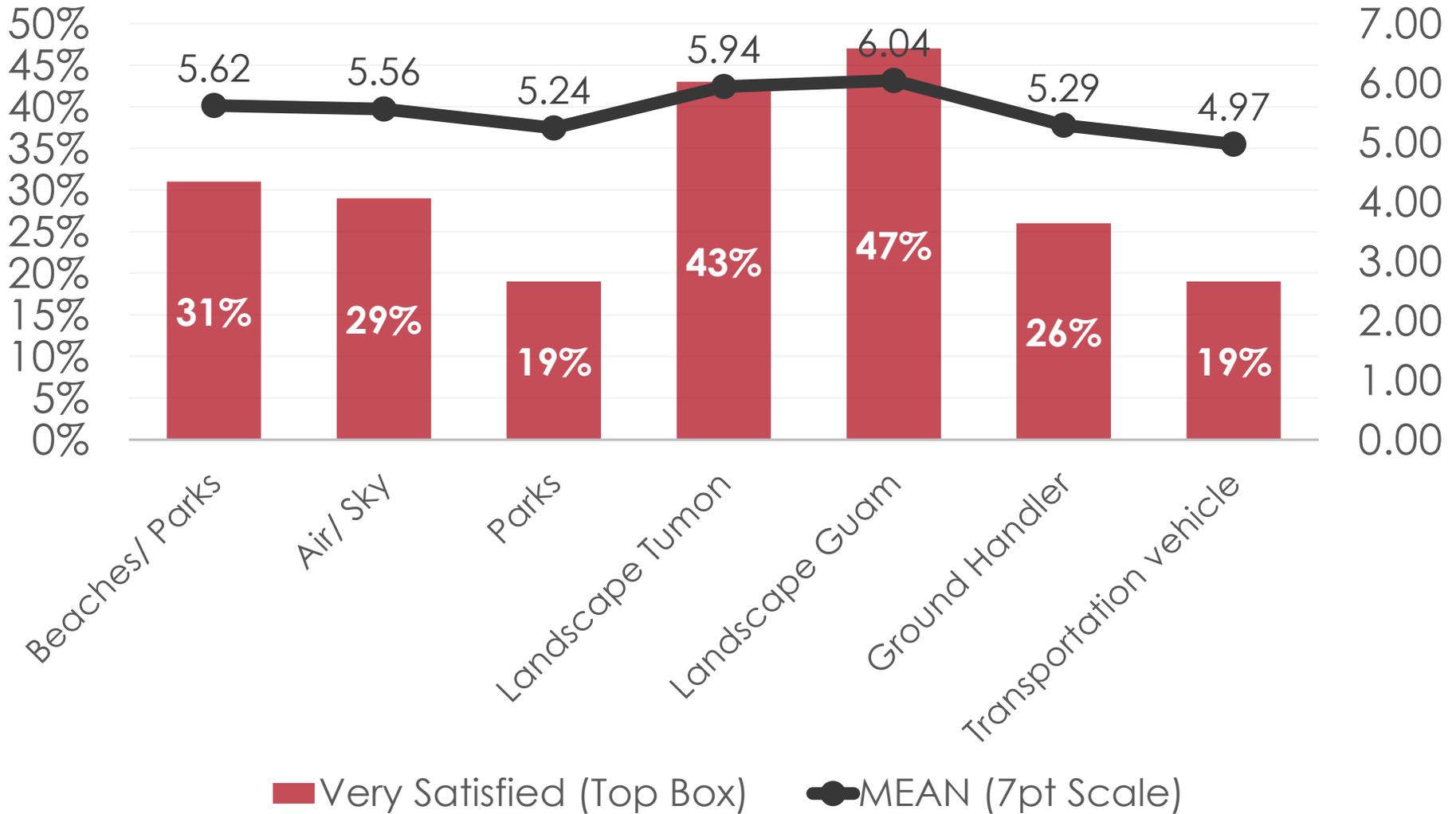
ACCOMMODATIONS –
OVERALL SATISFACTION
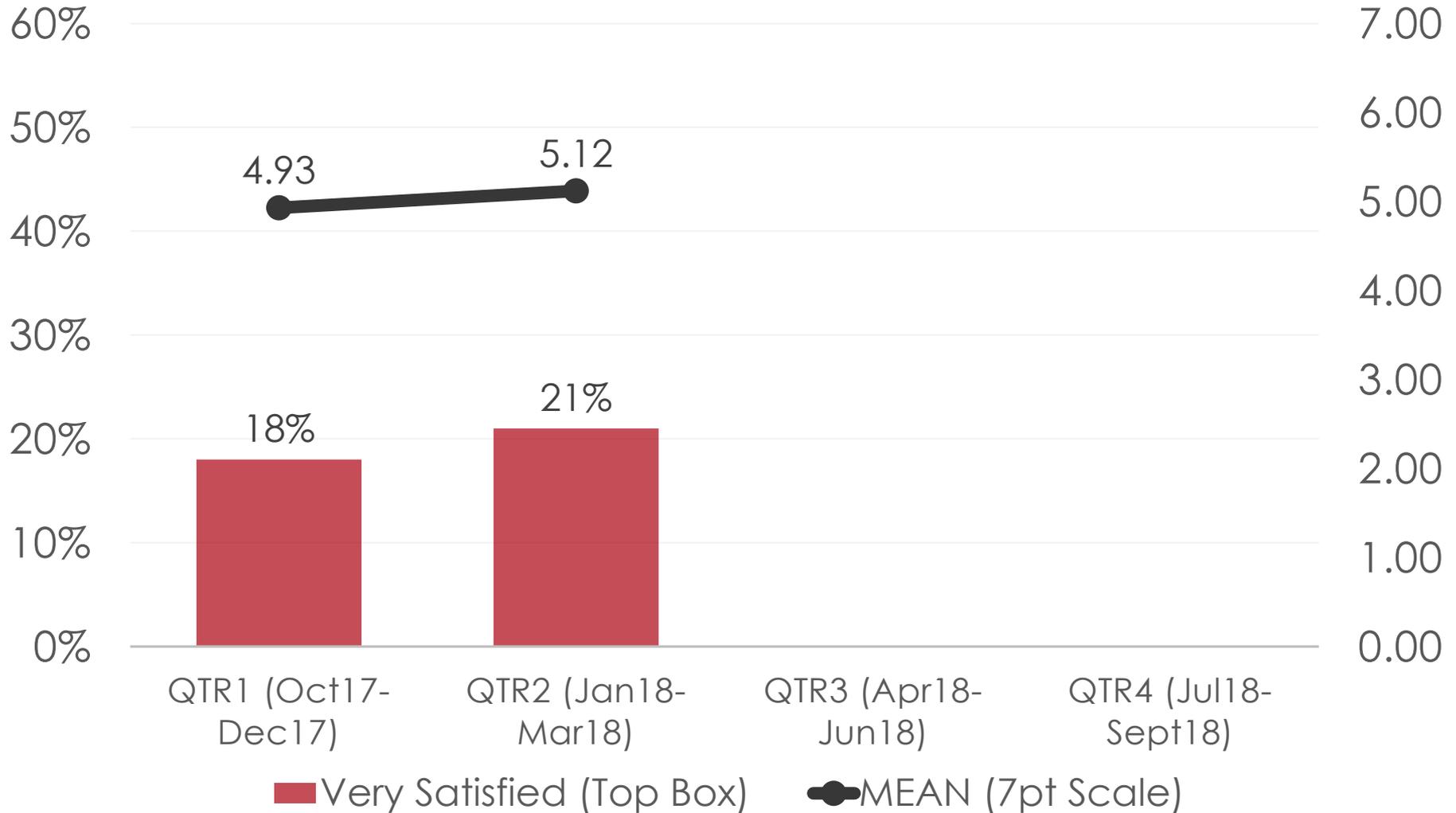
ACCOMMODATIONS –
Satisfaction by Category

Category	Very Satisfied (Top Box)	MEAN (7pt Scale)
Room	27%	5.17
View	33%	5.24
Furnishings	21%	4.91
Cleanliness	19%	4.79
Food- Quality	16%	4.71
Food- Quantity	19%	4.83
Staff	34%	5.52
Service	30%	5.32
Value	25%	5.28

Very Satisfied (Top Box) ■ MEAN (7pt Scale) ●

[A]
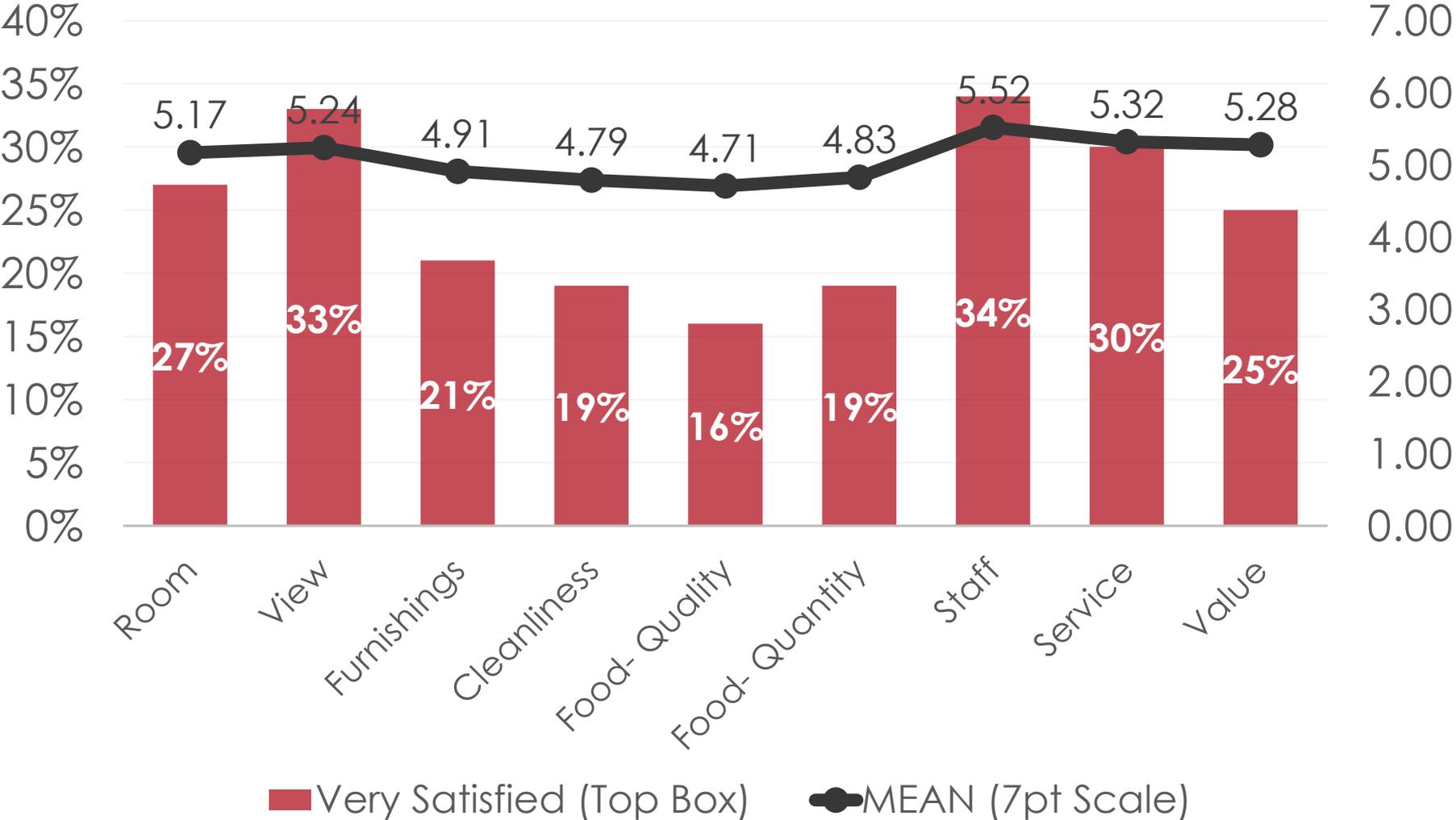
DINING EXPERIENCE (Outside Hotel) –
Satisfaction by Category

Furnishings: 26%, 5.34
Cleanliness: 19%, 5.03
Food- Quality: 23%, 5.21
Food- Quantity: 30%, 5.29
Staff: 33%, 5.54
Service: 30%, 5.44
Value: 26%, 5.45

Very Satisfied (Top Box) — MEAN (7pt Scale)

[A]
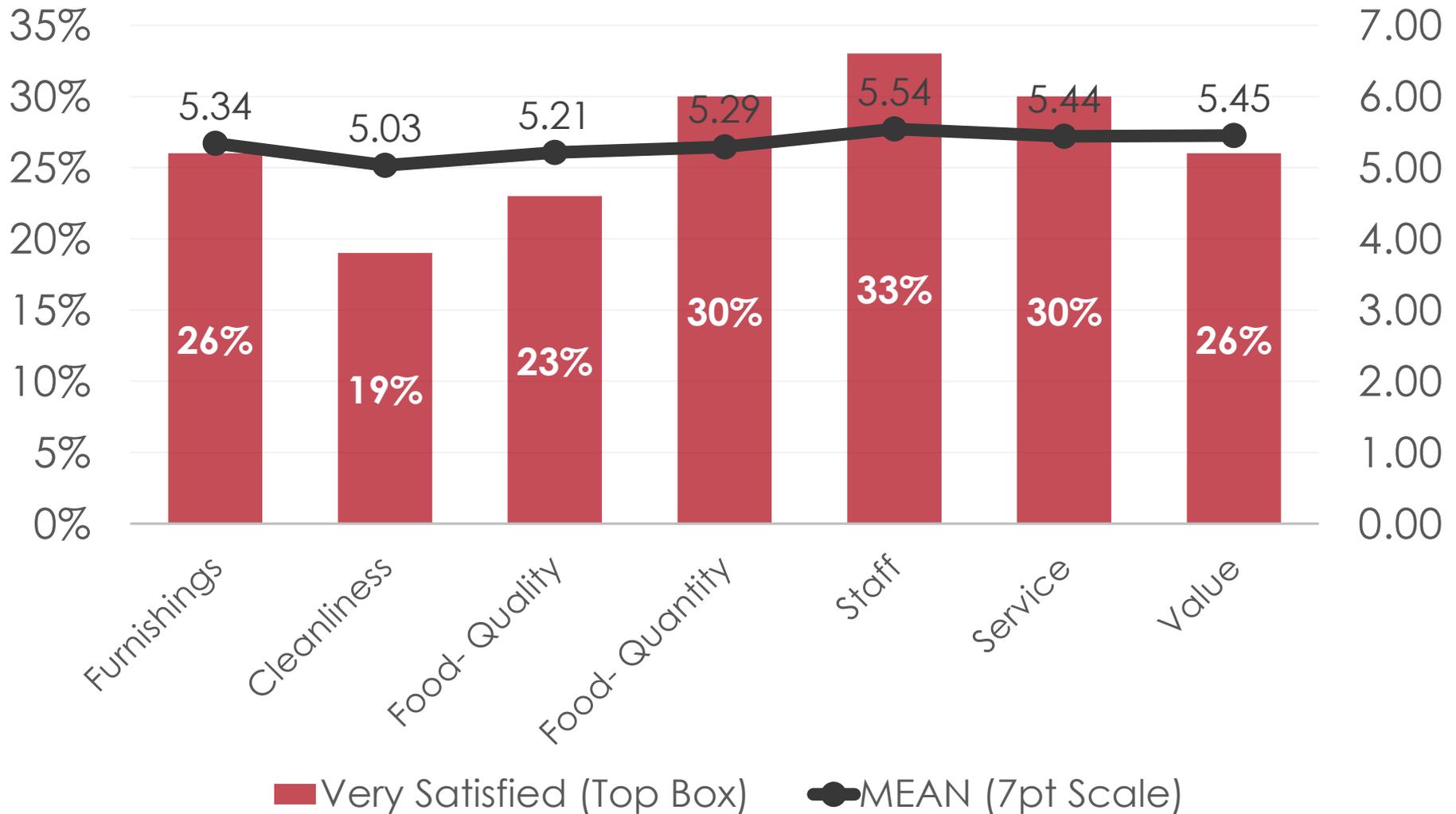
Shopping Malls/ Stores (Top Responses)

Store	Percentage
ABC Store	97%
DFS Galleria	72%
K-Mart	63%
JP Super	58%
The Plaza	58%
Micro Mall	55%
Guam Premium Outlet	50%
Tumon Sands	27%
Macys	26%
Ross	21%

[A]

SHOPPING - SATISFACTION

5.24   5.18

23%   23%

QUALITY   VARIETY

■ Very Satisfied (Top Box)   ●—● MEAN (7pt Scale)

[A]
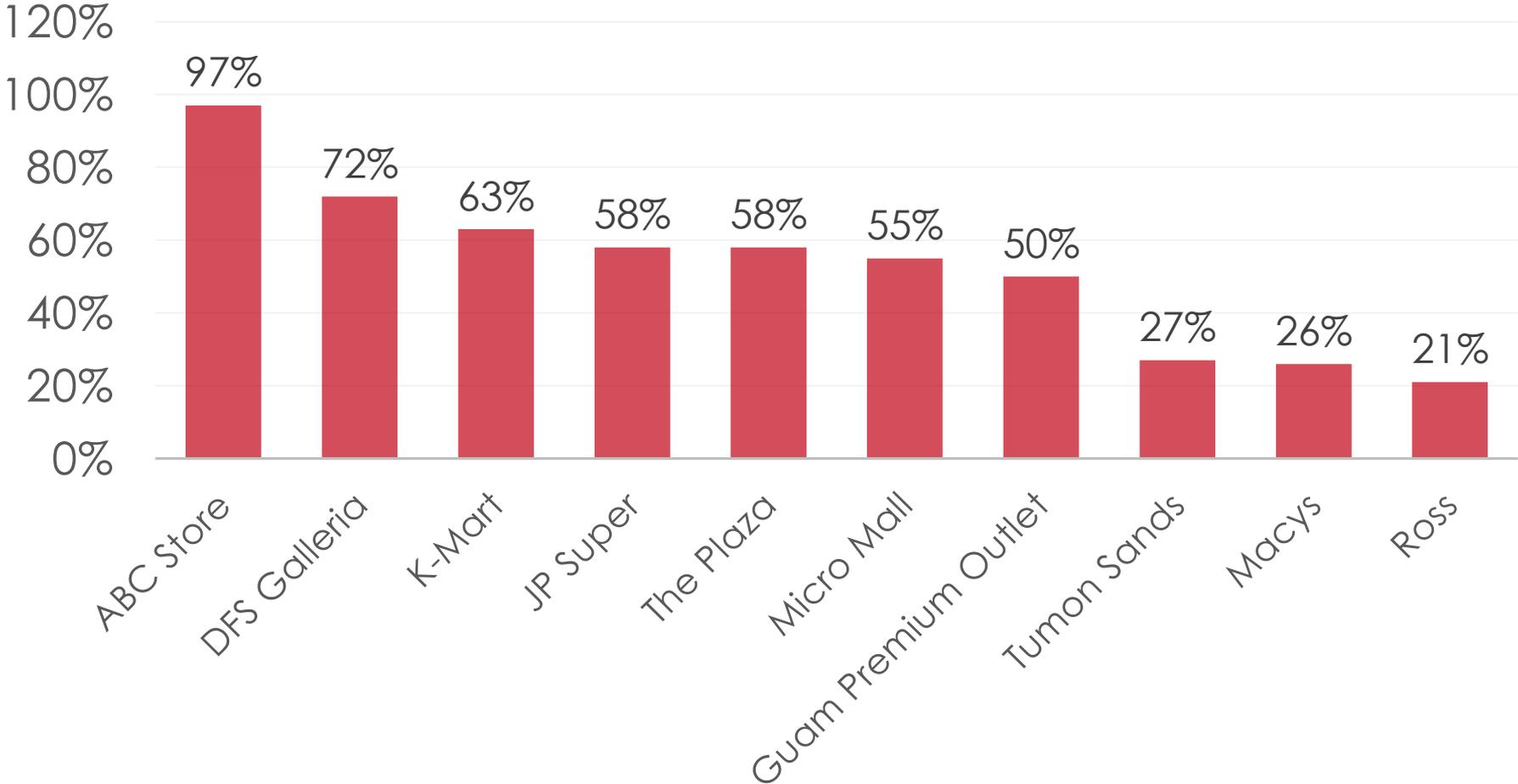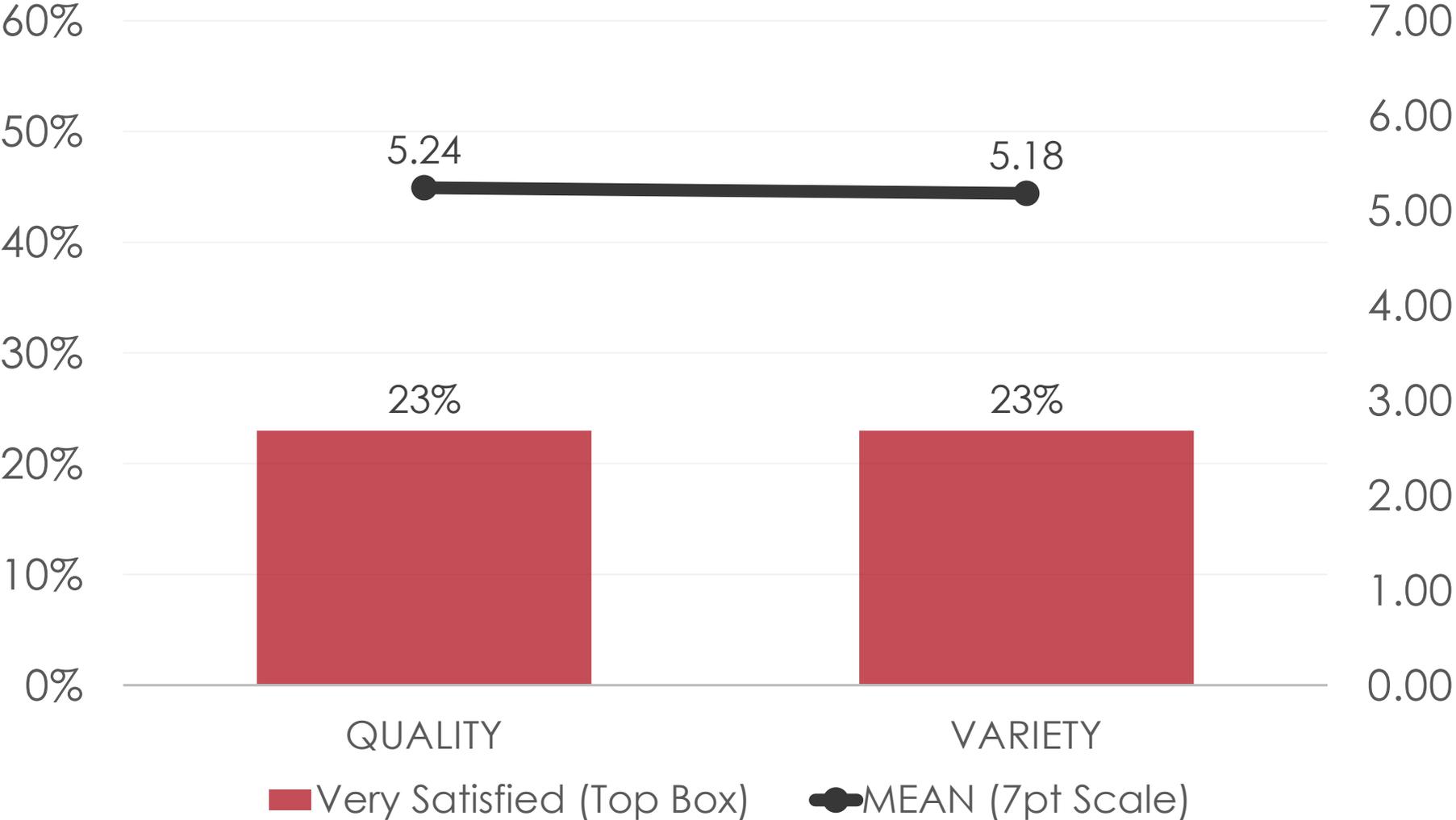
OPTIONAL TOUR PARTICIPATION – FY2018 Tracking

[A]

Optional Tour Participation
(Top Responses/ 5%+)

Bar chart showing: Alupang BC 8%, Chamorro Night Mkt 6%, Ocean Jet Club 5%, Fisheye 5%
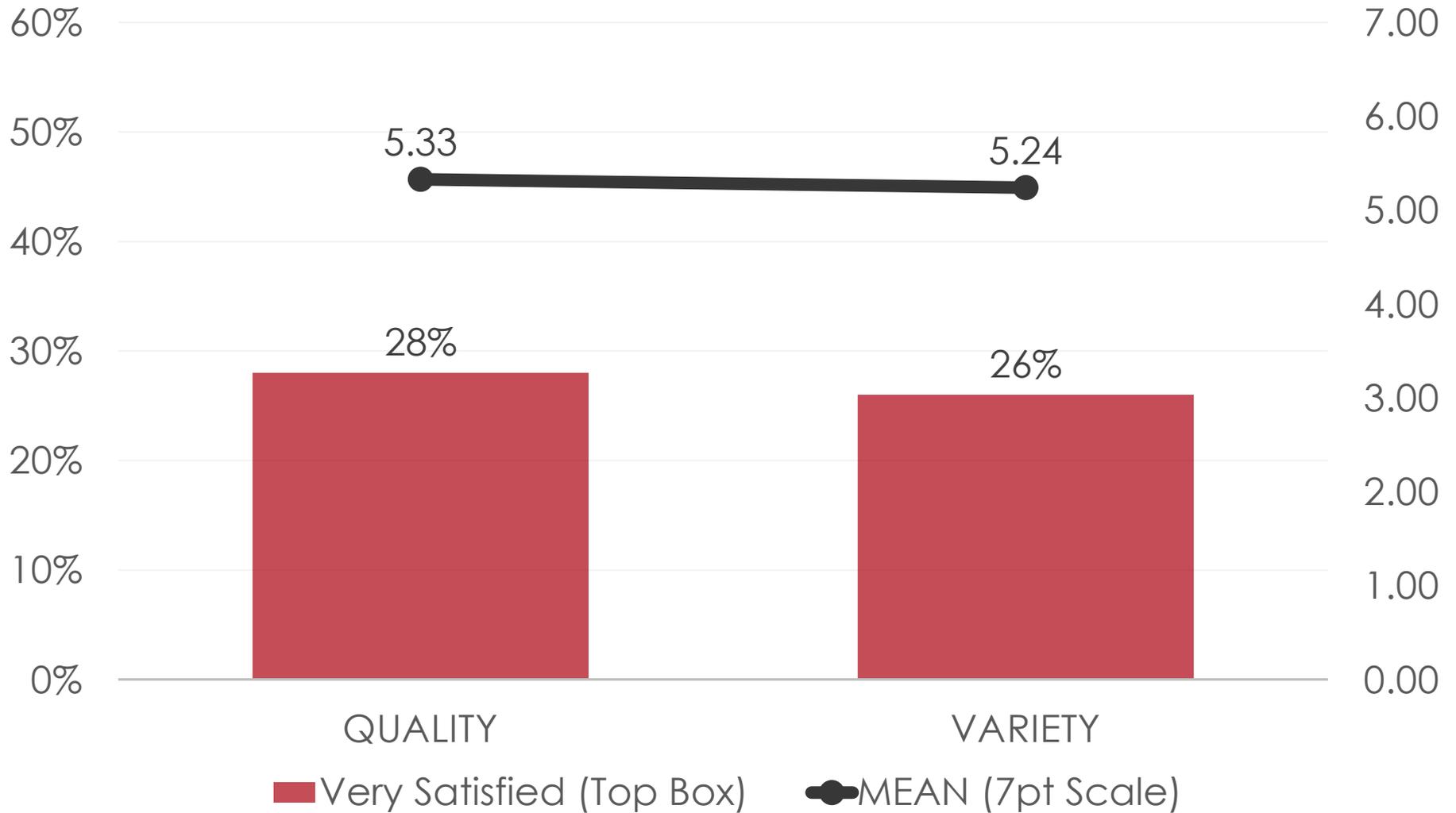
[A]
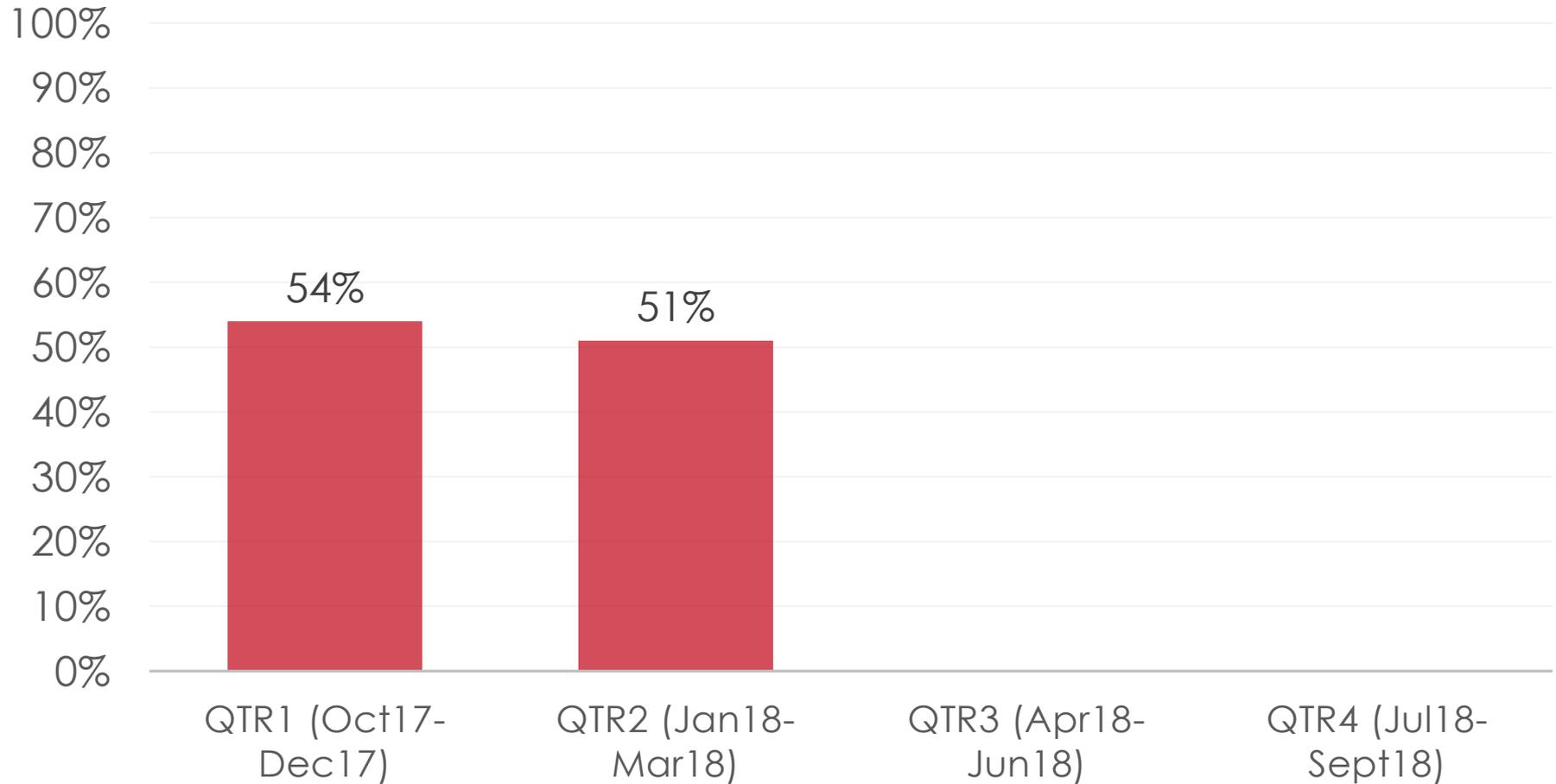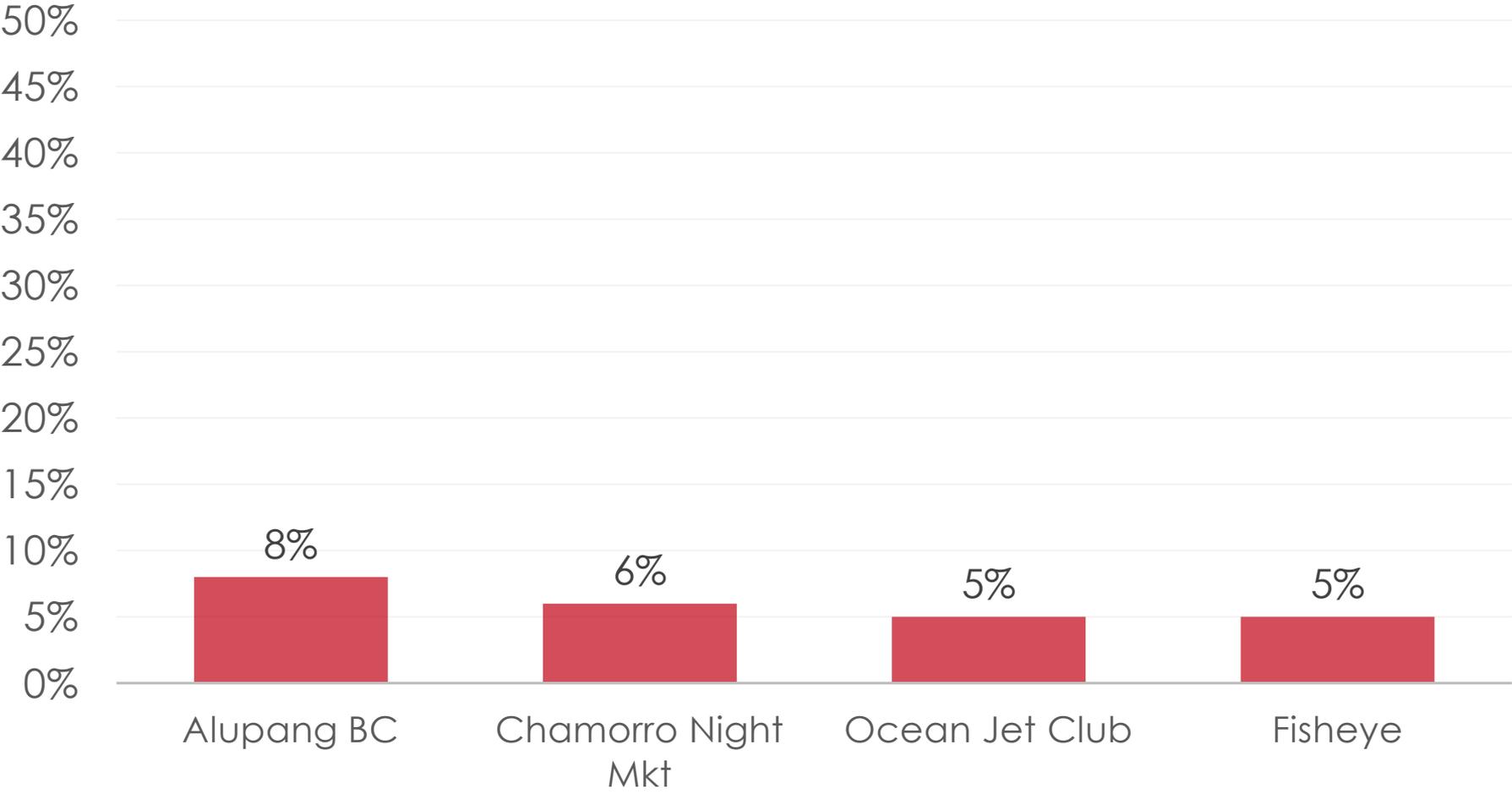
Optional Tour Satisfaction
Top Responses only - Participation (5%+)

DAY TOUR - SATISFACTION

QUALITY — 28% — 5.33

VARIETY — 26% — 5.24

■ Very Satisfied (Top Box)   ●━━ MEAN (7pt Scale)

[A]

NIGHT TOUR - SATISFACTION

QUALITY — 4.73 — 15%
VARIETY — 4.71 — 15%

Very Satisfied (Top Box)   MEAN (7pt Scale)
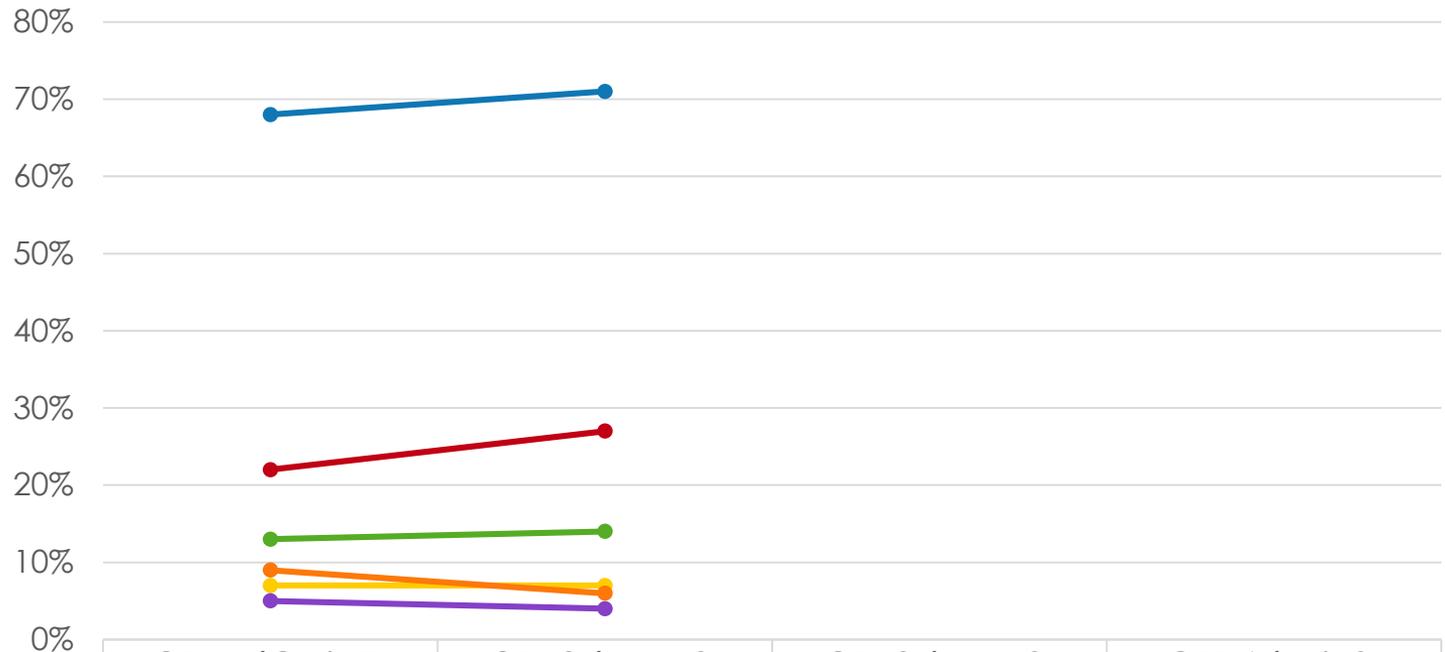
[A]
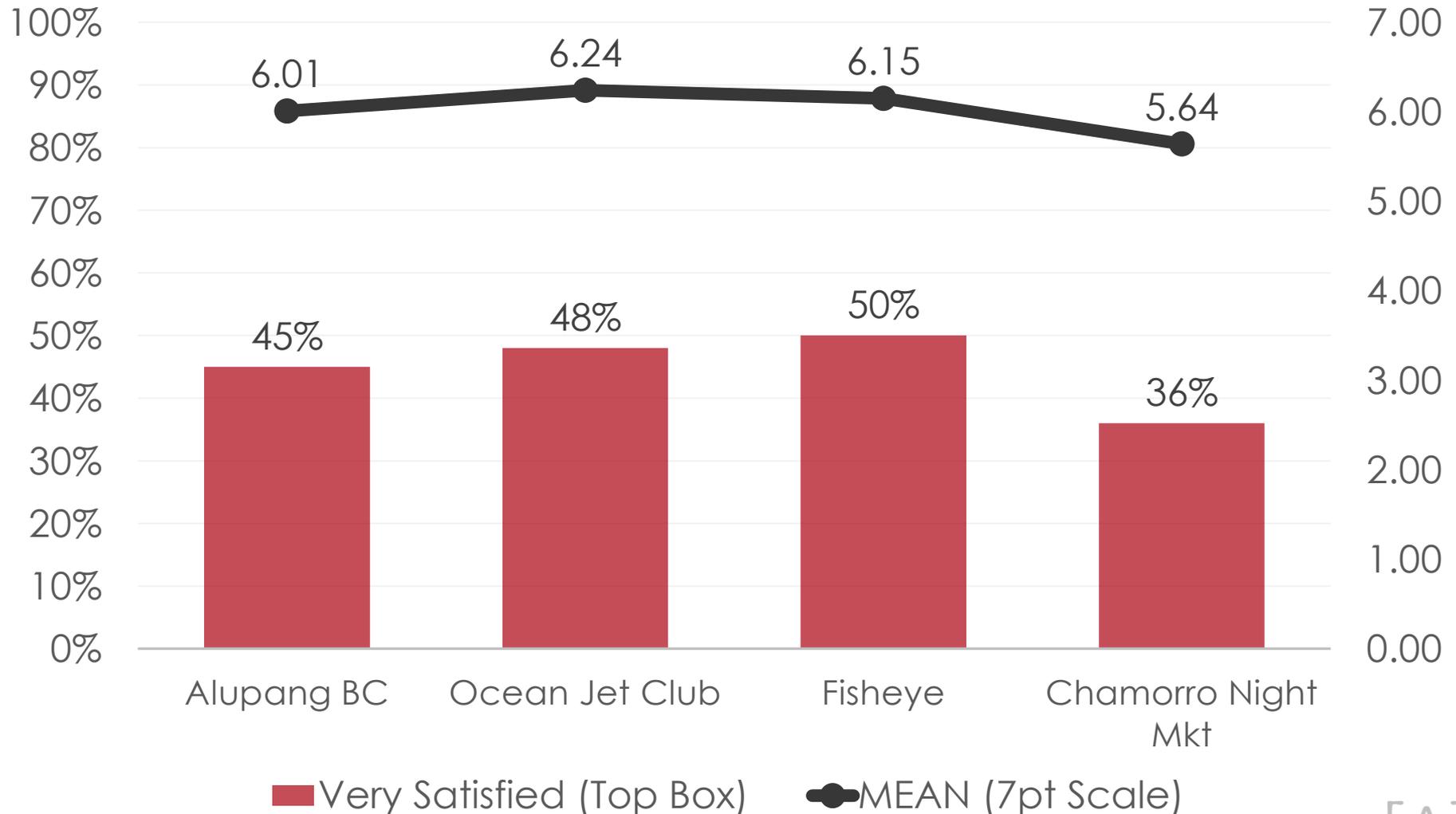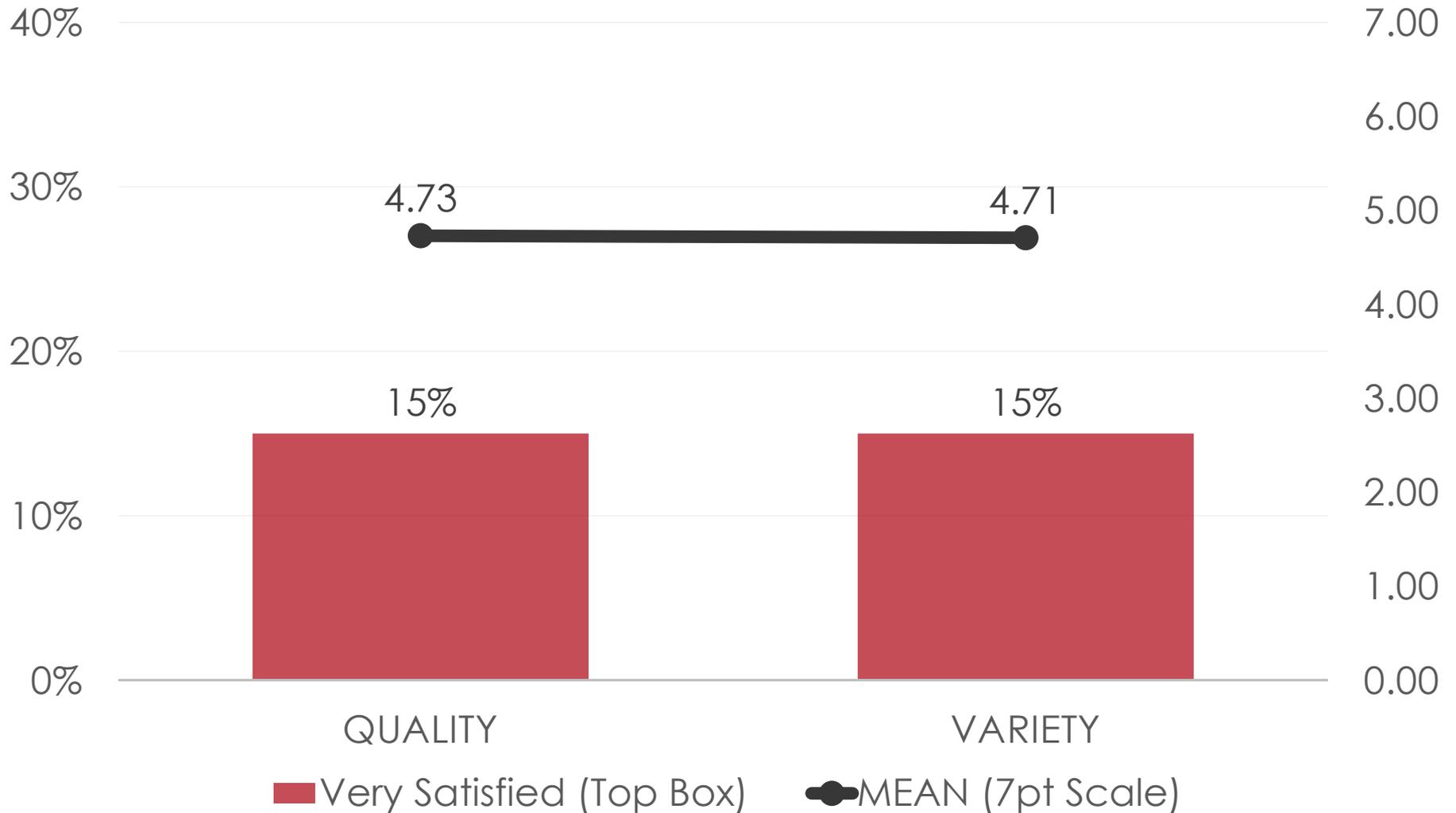
Activities Participation (Top Responses)

[A]
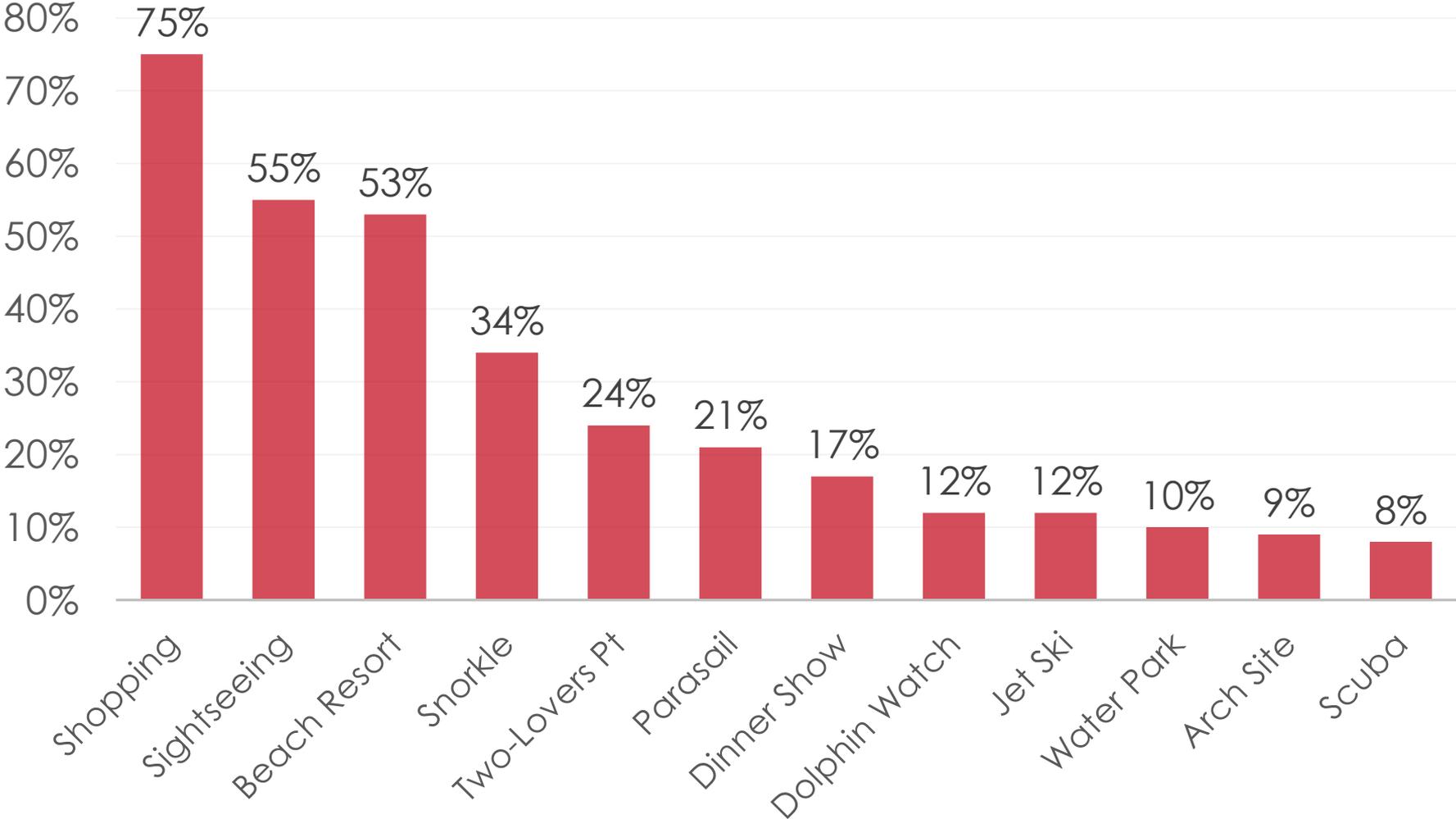
SECTION 5 PROMOTIONS

[A]

INTERNET- GUAM SOURCES OF INFORMATION

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

[A]

INTERNET- SOURCES OF INFORMATION
Things to do on Guam
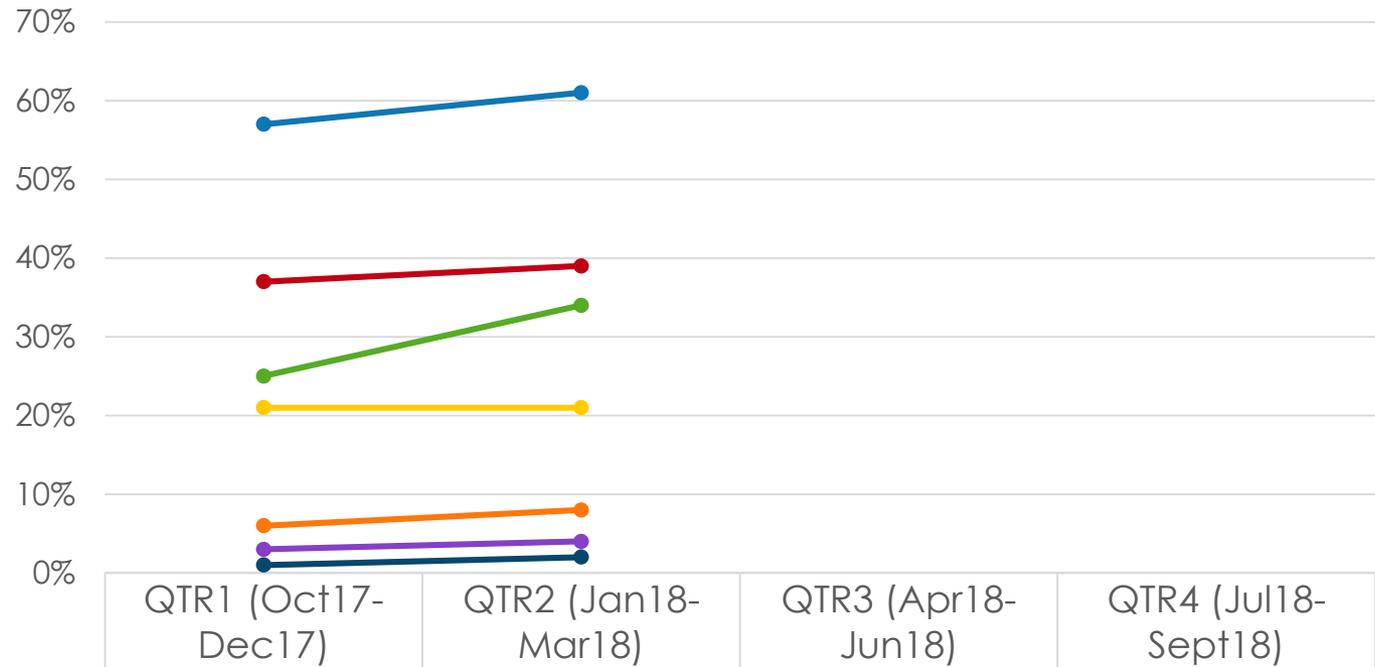
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Google	57%	61%		
Yahoo	37%	39%		
Instagram	25%	34%		
Online Booking Site	21%	21%		
Facebook	3%	4%		
Twitter	6%	8%		
Other	1%	2%		

[A]

INTERNET- SOURCES OF INFORMATION GVB
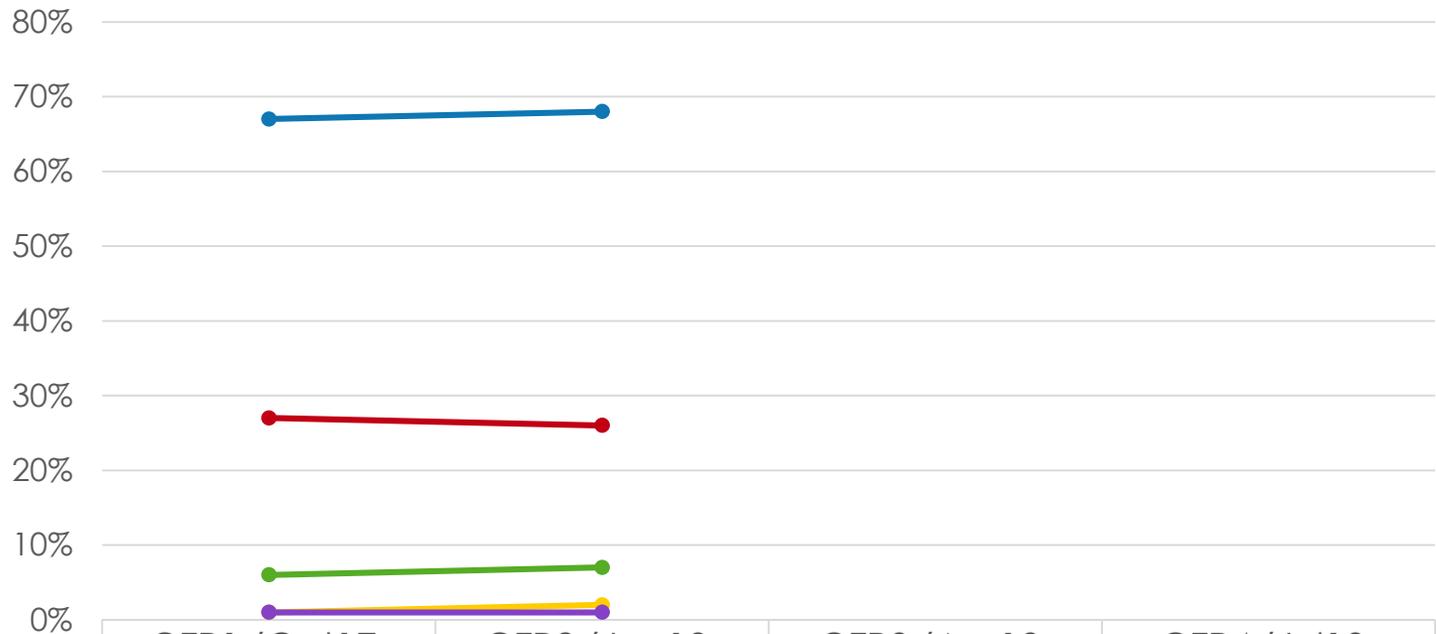
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
None	67%	68%		
GVB Website	27%	26%		
GVB Instagram	6%	7%		
GVB Twitter	1%	2%		
GVB Facebook'	1%	1%		

[A]

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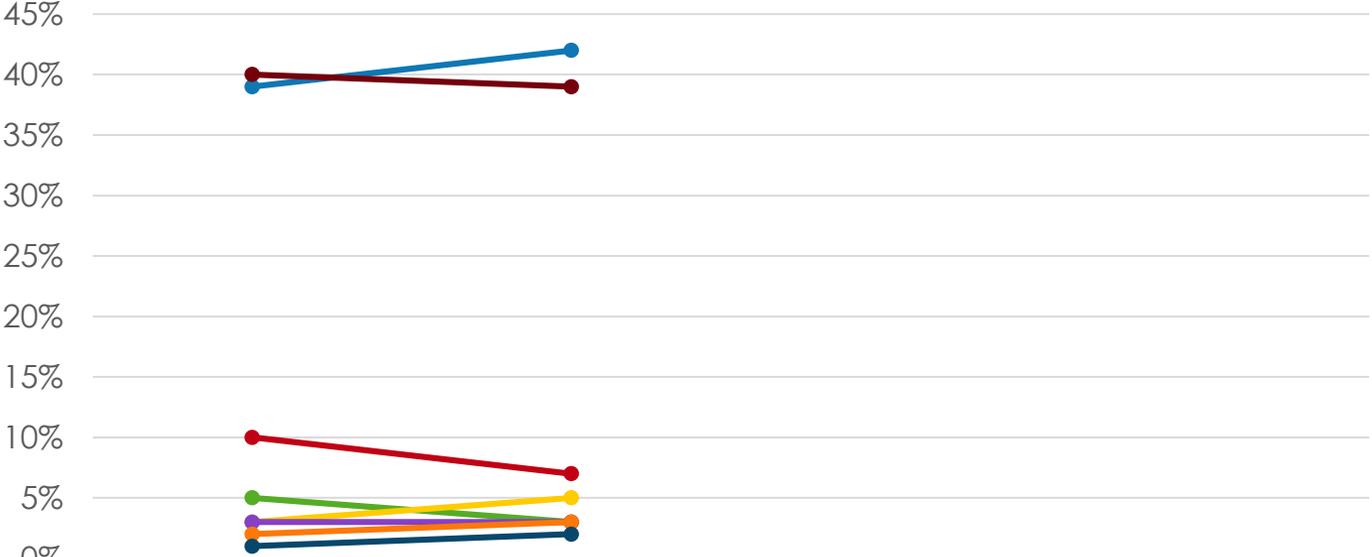
	QTR1 (Oct17-Dec17)	QTR2 (Jan18-Mar18)	QTR3 (Apr18-Jun18)	QTR4 (Jul18-Sept18)
Friends/ Family	39%	42%		
Company/ Bus Trip	10%	7%		
Internet	5%	3%		
Travel Show	3%	5%		
Travel Agent	3%	3%		
Print	2%	3%		
Social Media	1%	2%		
None	40%	39%		

[A]

PRE-ARRIVAL SOURCES OF INFORMATION

[A]
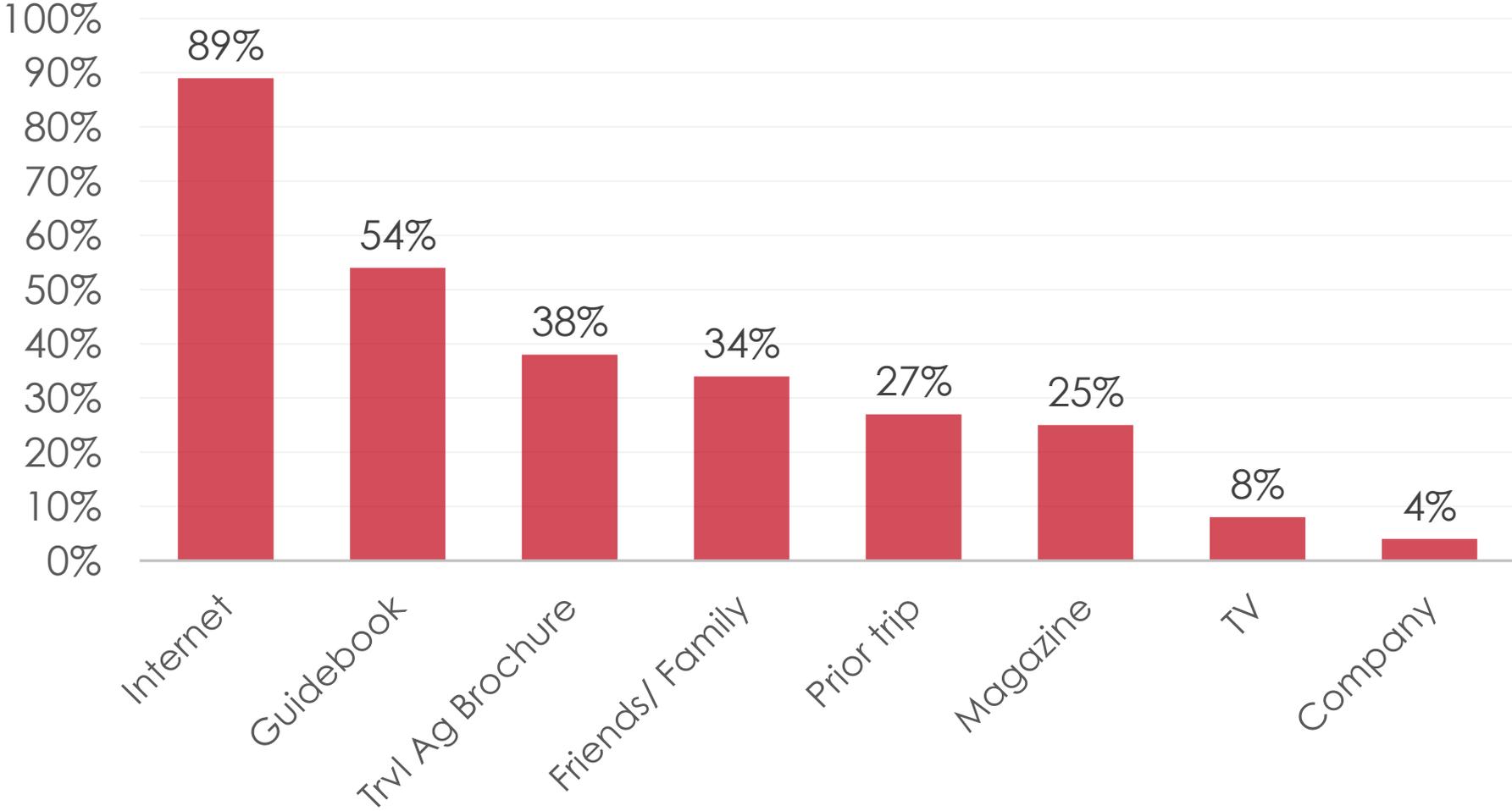
PRE-ARRIVAL
SOURCES OF INFORMATION –
Key Segments
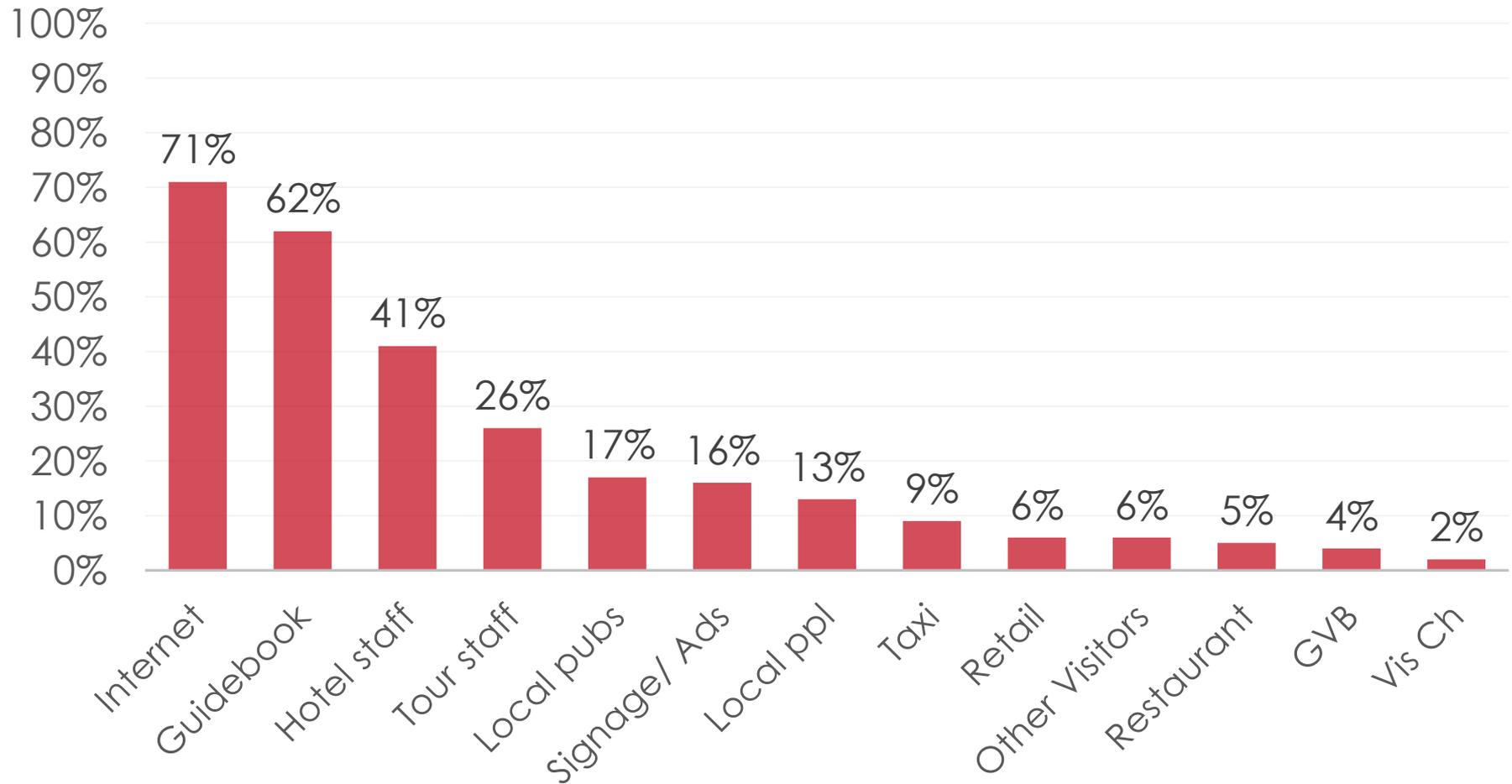
GVB EXIT SURVEY
Q1 Please select the top three sources of information you used to find out about Guam before your trip:

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q1	Internet/Mobile App	89%	89%	87%	89%	71%	100%	86%	85%
	Travel guide book at bookstores	54%	54%	45%	56%	53%		53%	50%
	Travel agent brochure	38%	36%	26%	33%	47%	25%	55%	41%
	Friend or relative	34%	24%	24%	32%	18%	50%	37%	33%
	I have been to Guam before	27%	38%	61%	45%	59%	25%	14%	29%
	Magazine (consumer)	25%	28%	22%	13%	24%	50%	20%	20%
	TV	8%	7%	8%	6%	6%	25%	4%	10%
	Co-worker/ company travel department	4%	0%	5%	8%		25%	2%	11%
	Consumer travel shows	4%	3%	3%	3%			6%	3%
	Guam Visitors Bureau promotional activities	2%	2%	2%	1%	6%			1%
	Guam Visitors Bureau office	1%	2%	1%					2%
	Newspaper	0%	0%	1%					1%
	Travel trade shows	0%	0%					2%	1%
	Radio	0%						2%	0%
	Theater ads	0%							0%
	Total	1056	452	476	144	17	4	51	323

Prepared by Anthology Research

ONISLE
SOURCES OF INFORMATION

[A]

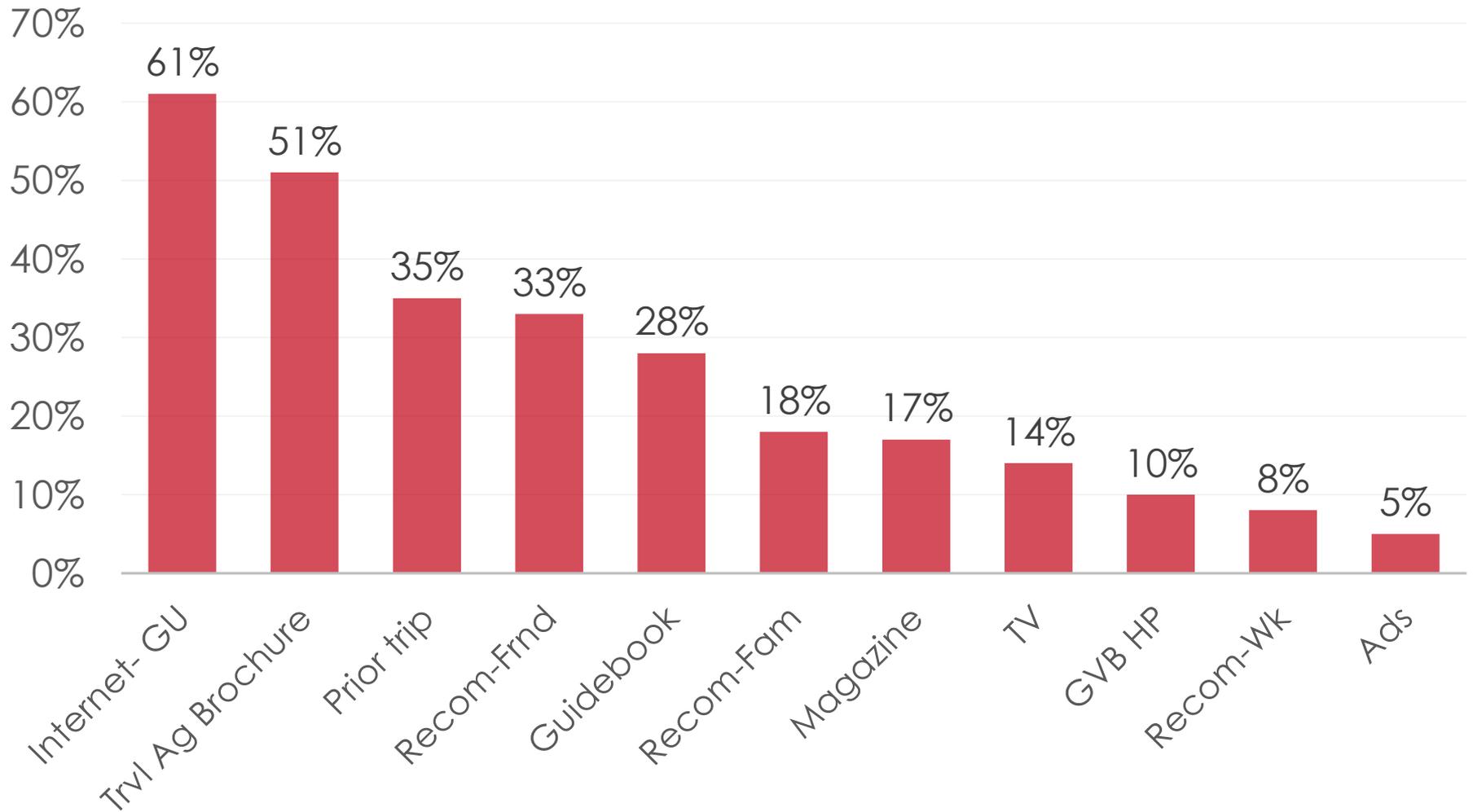# ON-ISLE SOURCES OF INFORMATION – Key Segments

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	71%	72%	66%	58%	59%	100%	69%	61%
	Guide books I brought with me	62%	62%	58%	70%	71%	25%	59%	66%
	Hotel staff	41%	46%	43%	35%	41%	50%	55%	37%
	Tour staff	26%	28%	23%	25%	35%	25%	24%	26%
	Local publication	17%	15%	20%	25%	12%		12%	26%
	Signs/ advertisement	16%	11%	19%	24%	12%		4%	29%
	Local people	13%	10%	11%	9%	12%		18%	11%
	Taxi drivers	9%	10%	9%	4%		25%	12%	7%
	Retail staff	6%	5%	5%	6%		25%	8%	6%
	Other visitors	6%	5%	5%	2%	24%		8%	4%
	Restaurant staff (outside hotel)	5%	3%	3%	1%	6%		4%	2%
	Guam Visitors Bureau	4%	5%	5%	3%	12%		4%	4%
	Visitors channel	2%	2%	3%	2%			2%	2%
	Total	1052	450	474	144	17	4	51	320

Prepared by Anthology Research

SOURCES OF INFORMATION
TRIP INFLUENCERS

Bar chart showing trip influencers:
- Internet- GU: 61%
- Trvl Ag Brochure: 51%
- Prior trip: 35%
- Recom-Frnd: 33%
- Guidebook: 28%
- Recom-Fam: 18%
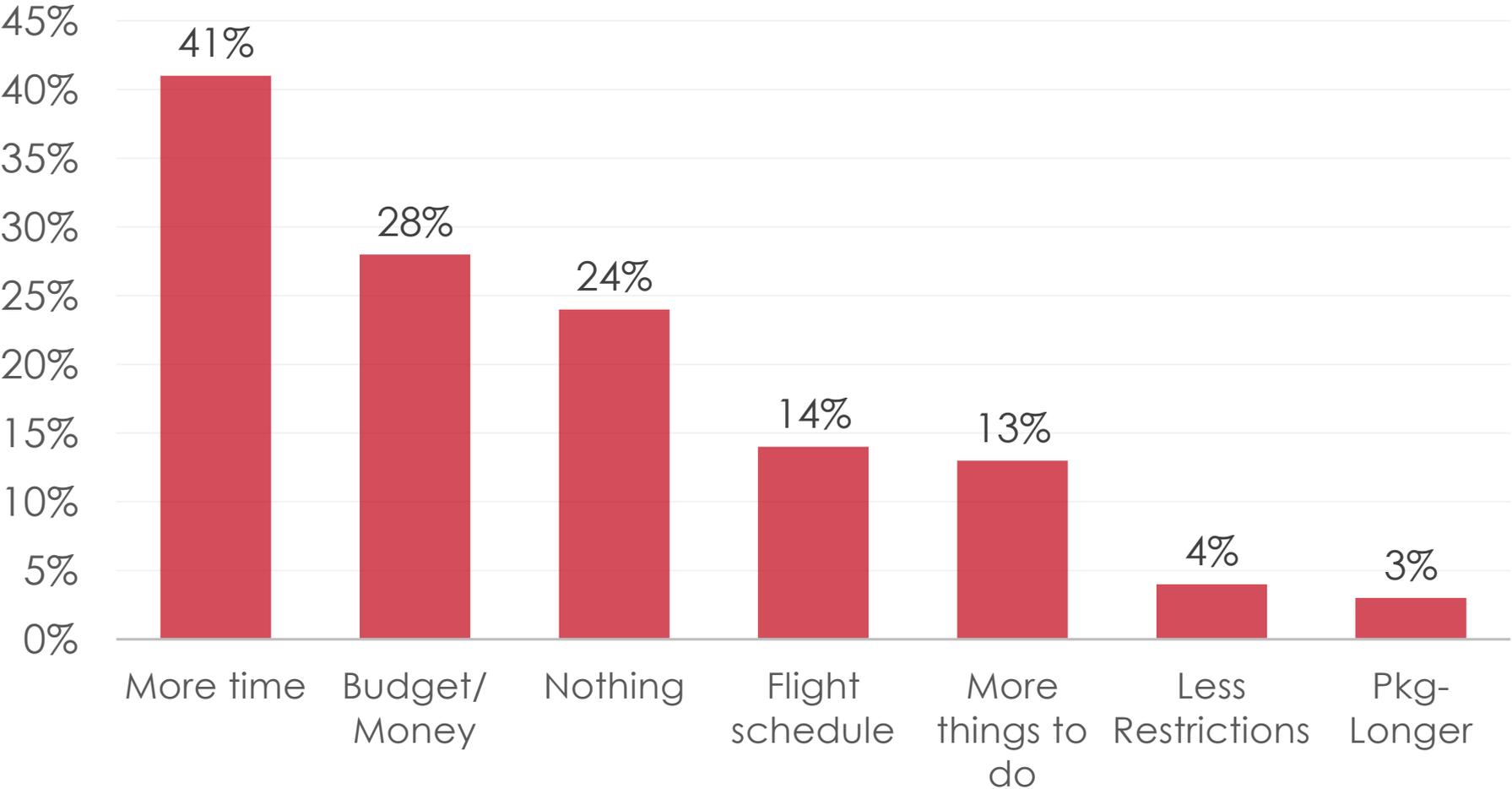- Magazine: 17%
- TV: 14%
- GVB HP: 10%
- Recom-Wk: 8%
- Ads: 5%

[A]

SECTION 6
FUTURE TRAVEL TO GUAM

[A]

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

Bar chart showing: QTR1 (Oct17-Dec17) 36%, QTR2 (Jan18-Mar18) 30%, QTR3 (Apr18-Jun18), QTR4 (Jul18-Sept18)

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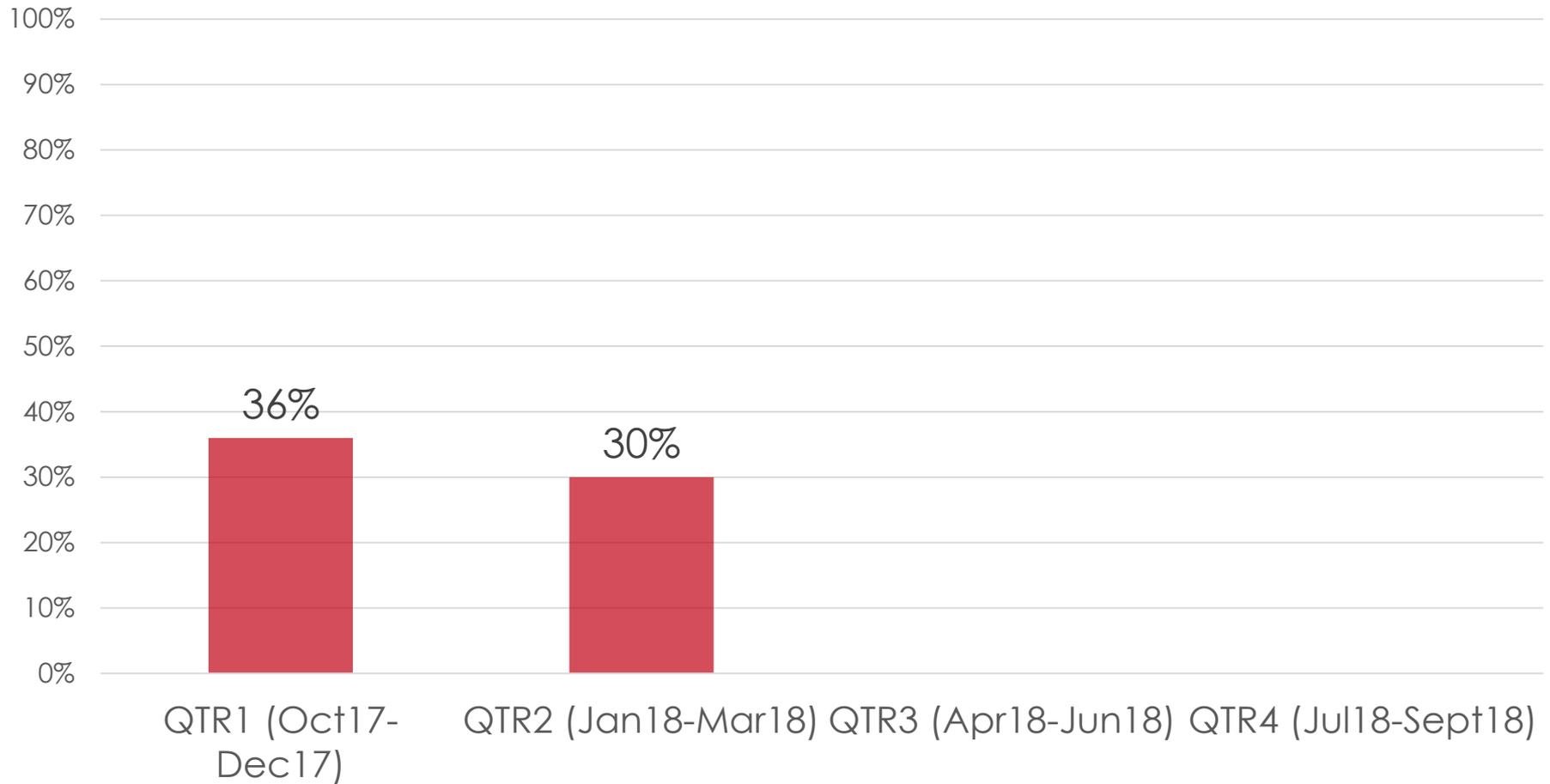
What would it take to make you stay an extra day on Guam?

[A]

FUTURE TRAVEL CONCERNS

[A]
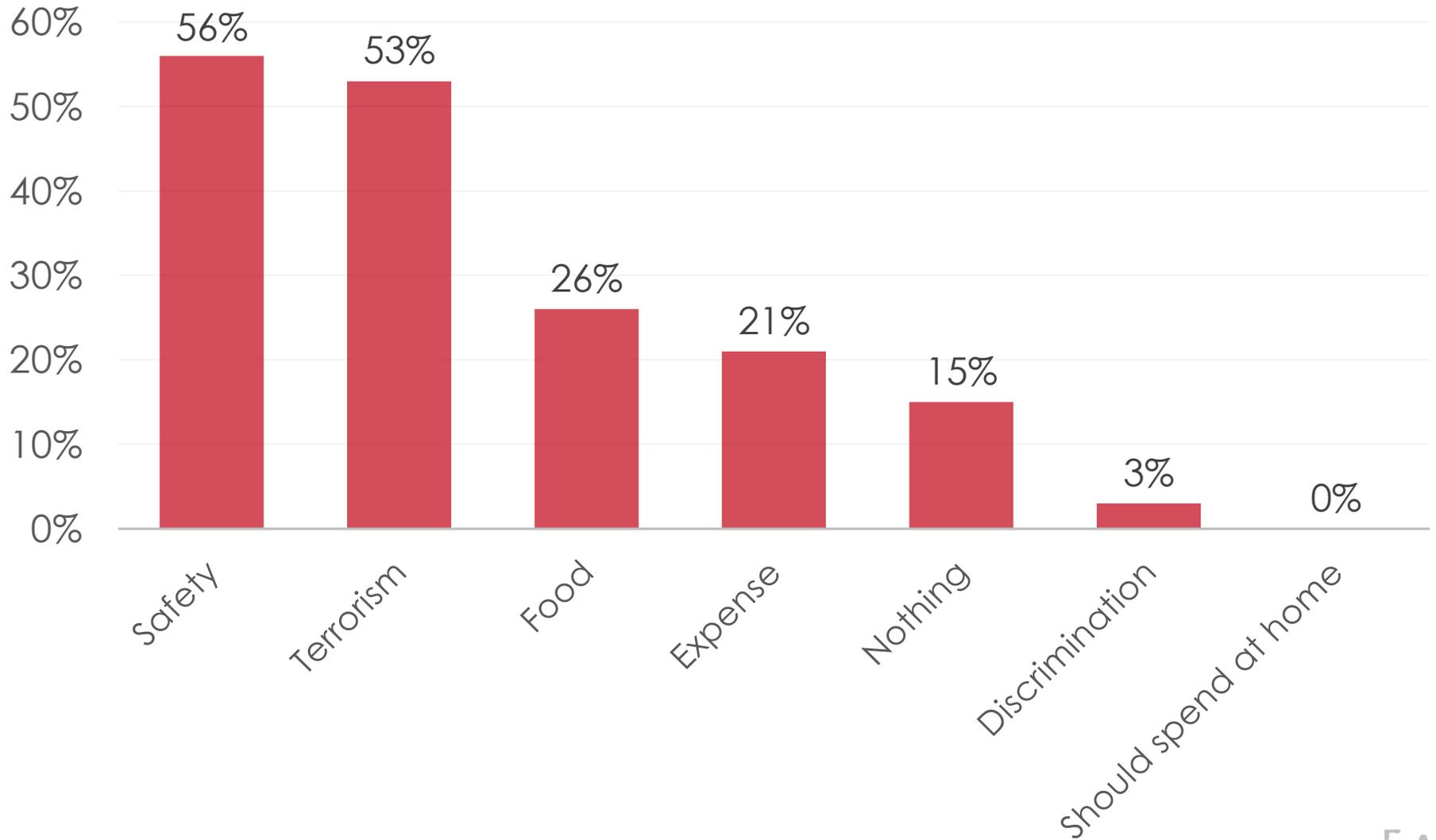
SECTION 7
GUAM CULTURE

[A]

EXPERIENCED-
CHAMORRO/ HAFA ADAI SPIRIT

[A]
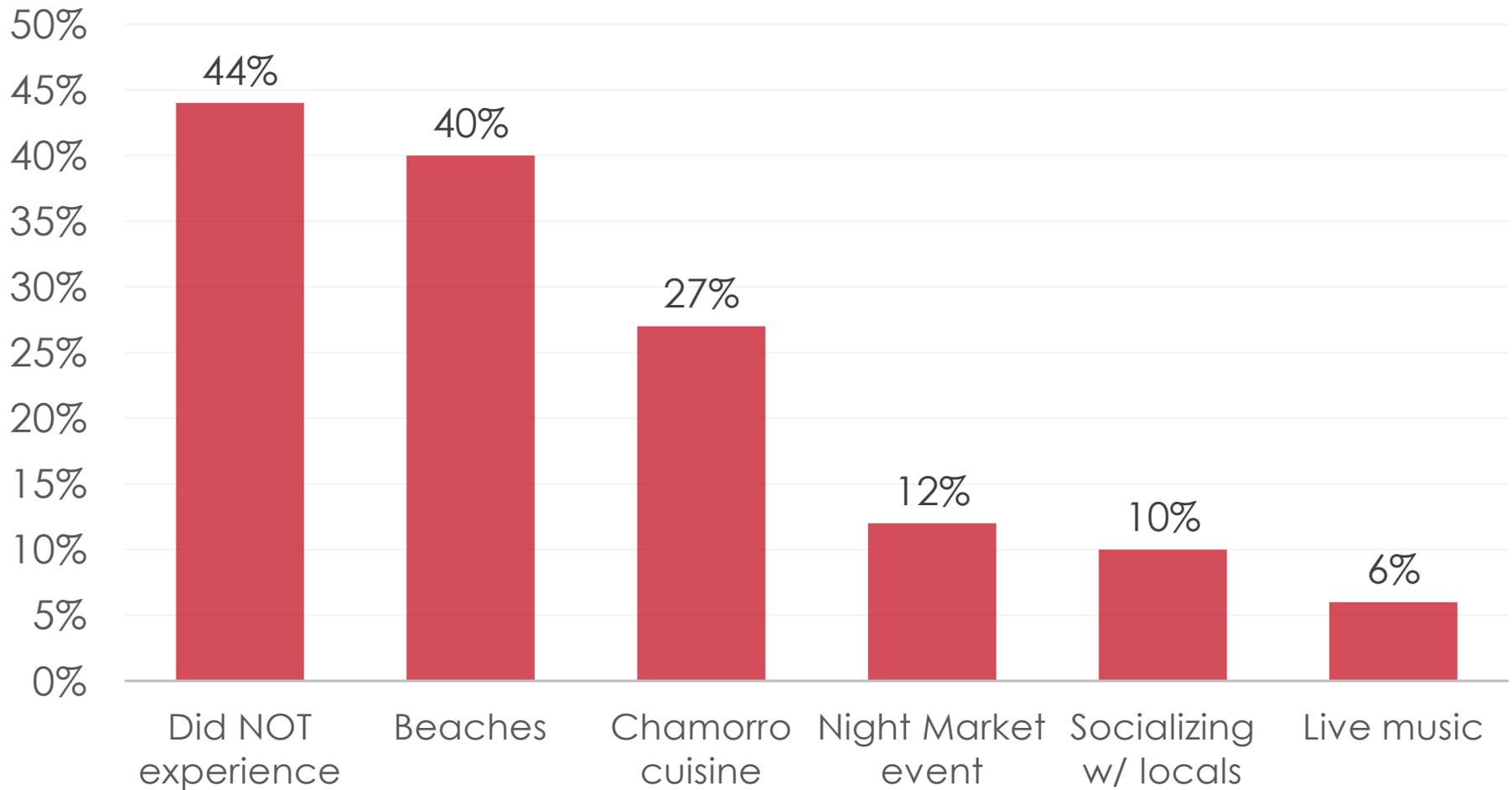
EXPERIENCED-
OTHER CULTURAL ACTIVITY/EVENTS

Bar chart showing:
- Did NOT experience: 62%
- Two Lovers Pt: 22%
- Chamorro Village: 12%
- Chamorro Cultural Entertainment: 7%
- Guam Museum: 3%

[A]
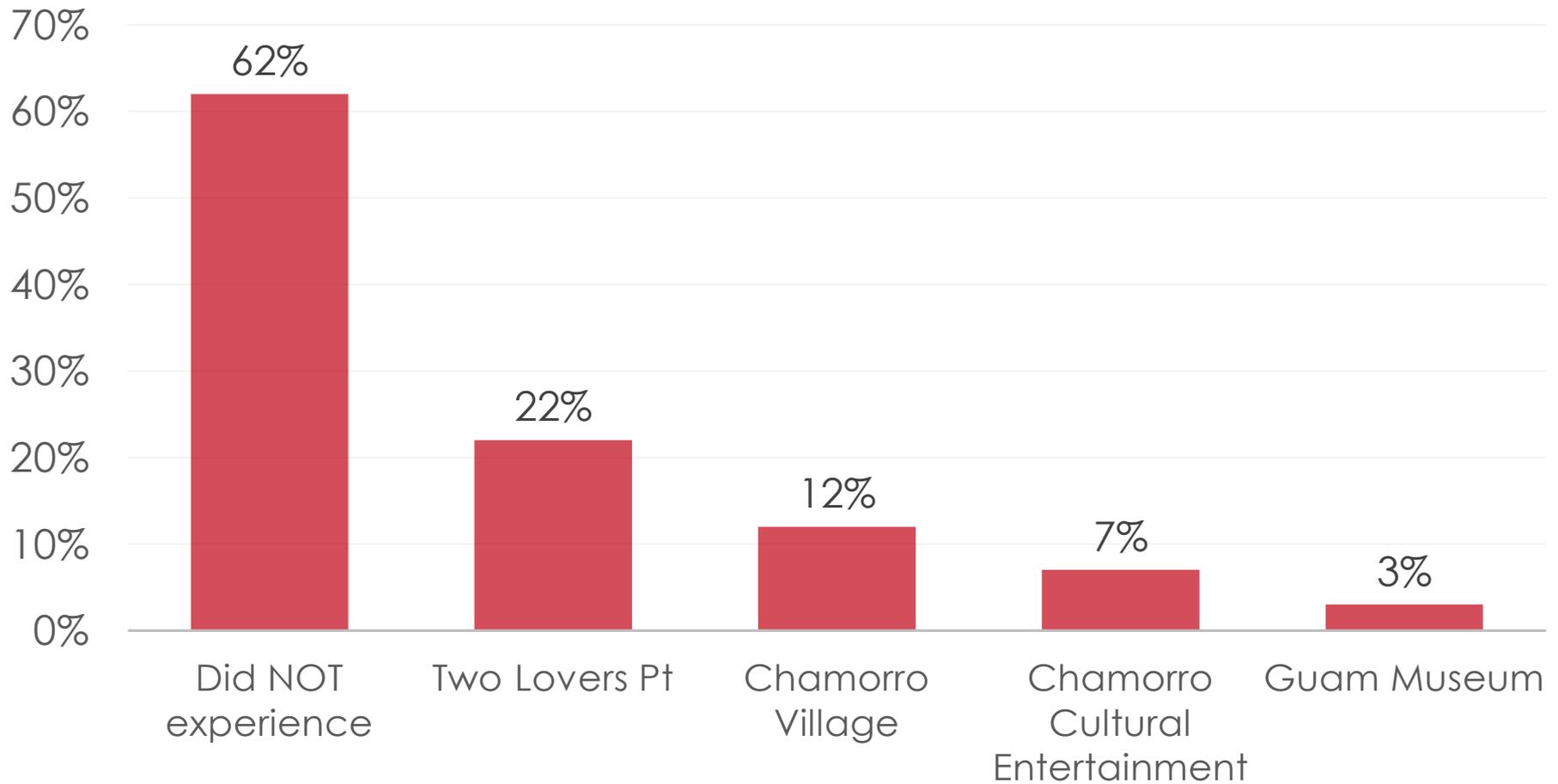
SOURCES OF INFORMATION-CULTURAL ACTIVITY/EVENTS

[A]
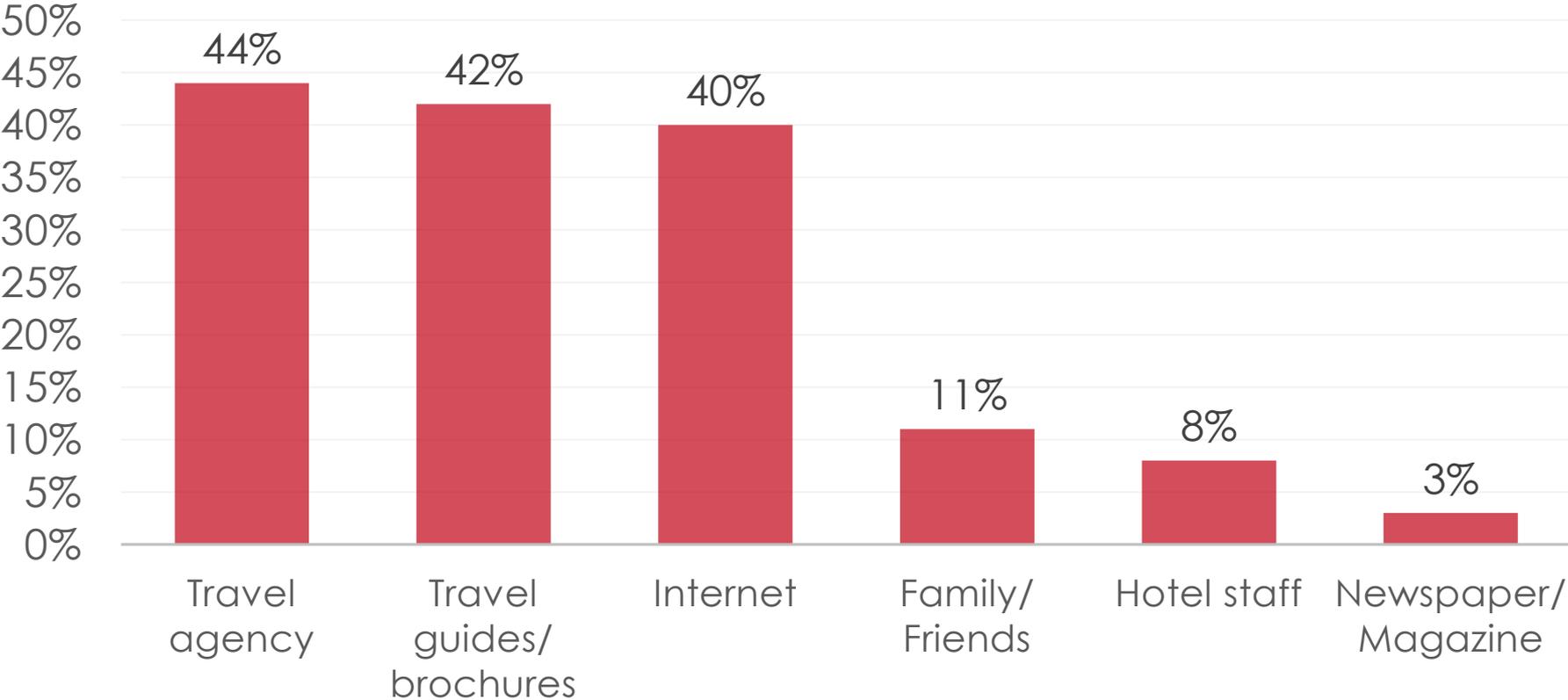
SATISFACTION-CULTURAL ACTIVITY/EVENTS
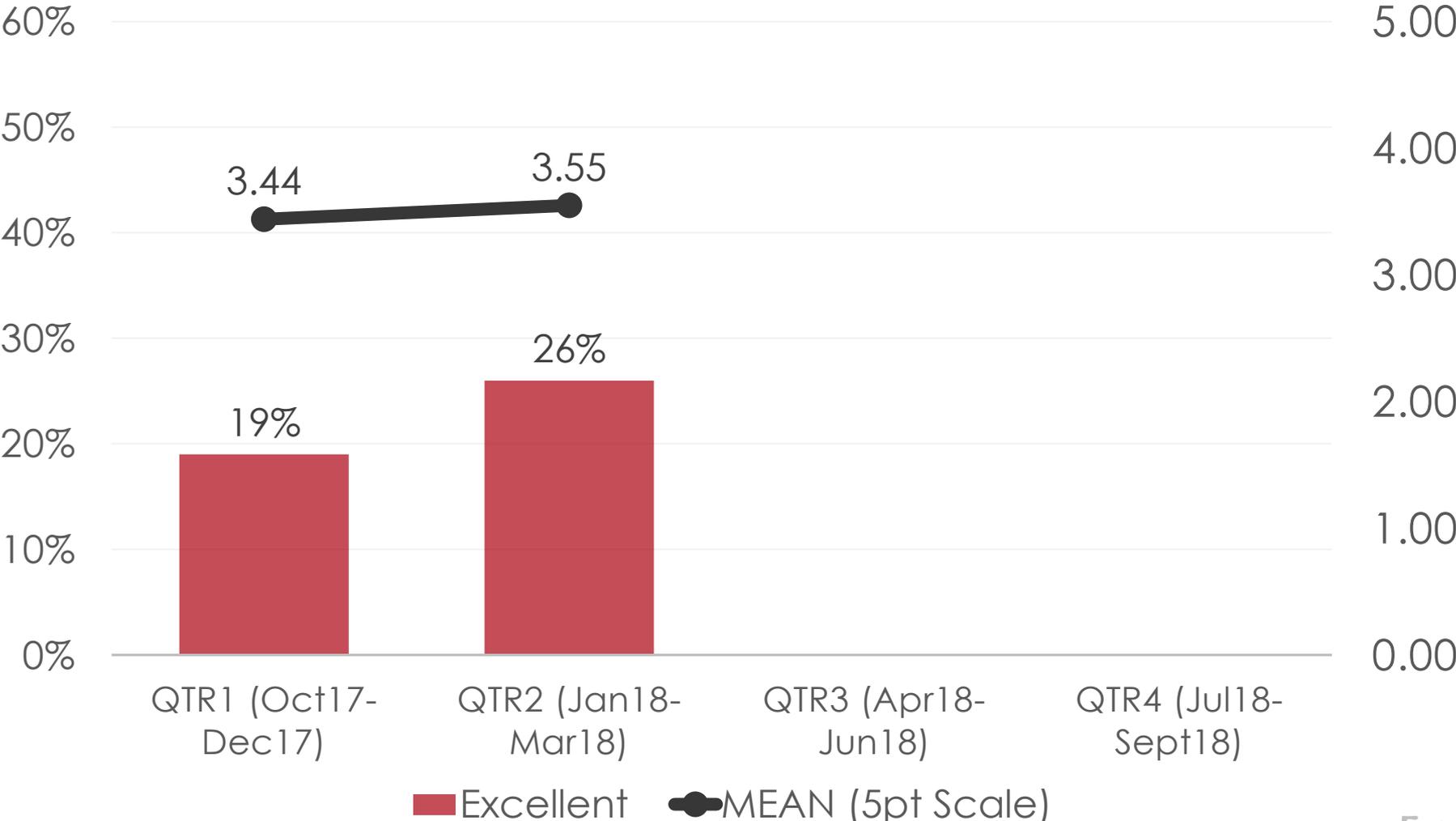
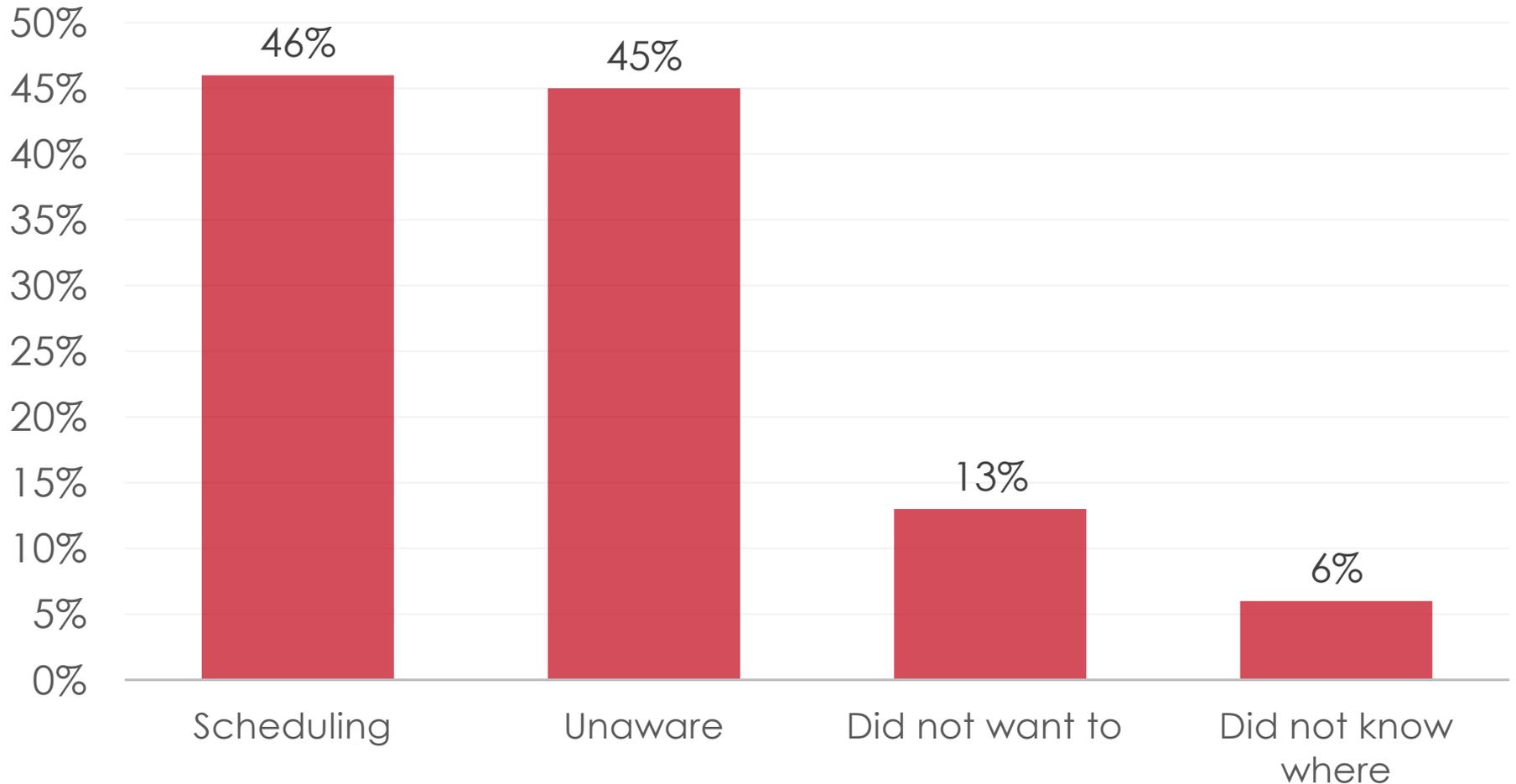# OBSTACLES-
CULTURAL ACTIVITY/EVENTS

[A]

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.

[A]

Drivers- Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, 1st and 2nd Qtr. 2017-8, and Overall 1-2 Qtr. 2017-8			
	1st Qtr 2017	**2nd Qtr. 2018**	Combined 1-2 Qtr. 2017-8
Drivers:	rank	**rank**	rank
Quality & Cleanliness of beaches & parks	4	**2**	3
Ease of getting around			
Safety walking around at night			
Quality of daytime tours	6		5
Variety of daytime tours		**4**	
Quality of nighttime tours			
Variety of nighttime tours	8	**7**	7
Quality of shopping		**3**	
Variety of shopping	2		2
Price of things on Guam	7		10
Quality of hotel accommodations	3	**8**	4
Quality/cleanliness of air, sky	5	**5**	6
Quality/cleanliness of parks			9
Quality of landscape in Tumon			
Quality of landscape in Guam	1	**1**	1
Quality of ground handler		**6**	8
Quality/cleanliness of transportation vehicles			
% of Overall Satisfaction Accounted For	55.5%	**60.4%**	57.9%
NOTE: Only significant drivers are included.			

[A]

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by eight significant factors in the 2nd Quarter FY2018 Period. By rank order they are:

  - **Quality of landscape in Guam,**
  - **Quality & cleanliness of beaches & parks,**
  - **Quality of shopping,**
  - **Variety of day time tours,**
  - **Quality/cleanliness of air, sky,**
  - **Quality of ground handler,**
  - **Variety of night time tours, and**
  - **Quality of hotel accommodations.**

- With these factors the overall r^2 is .604 meaning that **60.4% of overall satisfaction is accounted for by these factors.**

[A]

Drivers – On-Isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, 2nd Qtr. 2018 and Overall 1st and 2nd Qtr. 2017-8			
	1st Qtr 2017	**2nd Qtr. 2018**	Combined 1-2 Qtr. 2017-8
Drivers:	rank	**rank**	rank
Quality & Cleanliness of beaches & parks			
Ease of getting around			
Safety walking around at night		**3**	
Quality of daytime tours			
Variety of daytime tours	4		
Quality of nighttime tours			
Variety of nighttime tours	2		
Quality of shopping	1	**1**	1
Variety of shopping	3		
Price of things on Guam			
Quality of hotel accommodations			
Quality/cleanliness of air, sky			
Quality/cleanliness of parks			
Quality of landscape in Tumon			
Quality of landscape in Guam			
Quality of ground handler	5		2
Quality/cleanliness of transportation vehicles		**2**	
% of Per Person On Island Expenditures Accounted For	3.7%	**1.5%**	1.0%
NOTE: Only significant drivers are included.			

[A]

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by three significant factors in the 2nd Quarter FY2018 Period. By rank order they are:
  - **Quality of shopping,**
  - **Quality & cleanliness of transportation vehicles, and**
  - **Safety walking around at night.**
- With these factors the overall r^2 is .015 meaning that **1.5% of per person on island expenditure is accounted for by these factors.**

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