

Guam Visitors Bureau

Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

JULY 2017

Prepared by: Anthology Research

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Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japan 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 **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japan 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 +/- 5.23 percentage points.

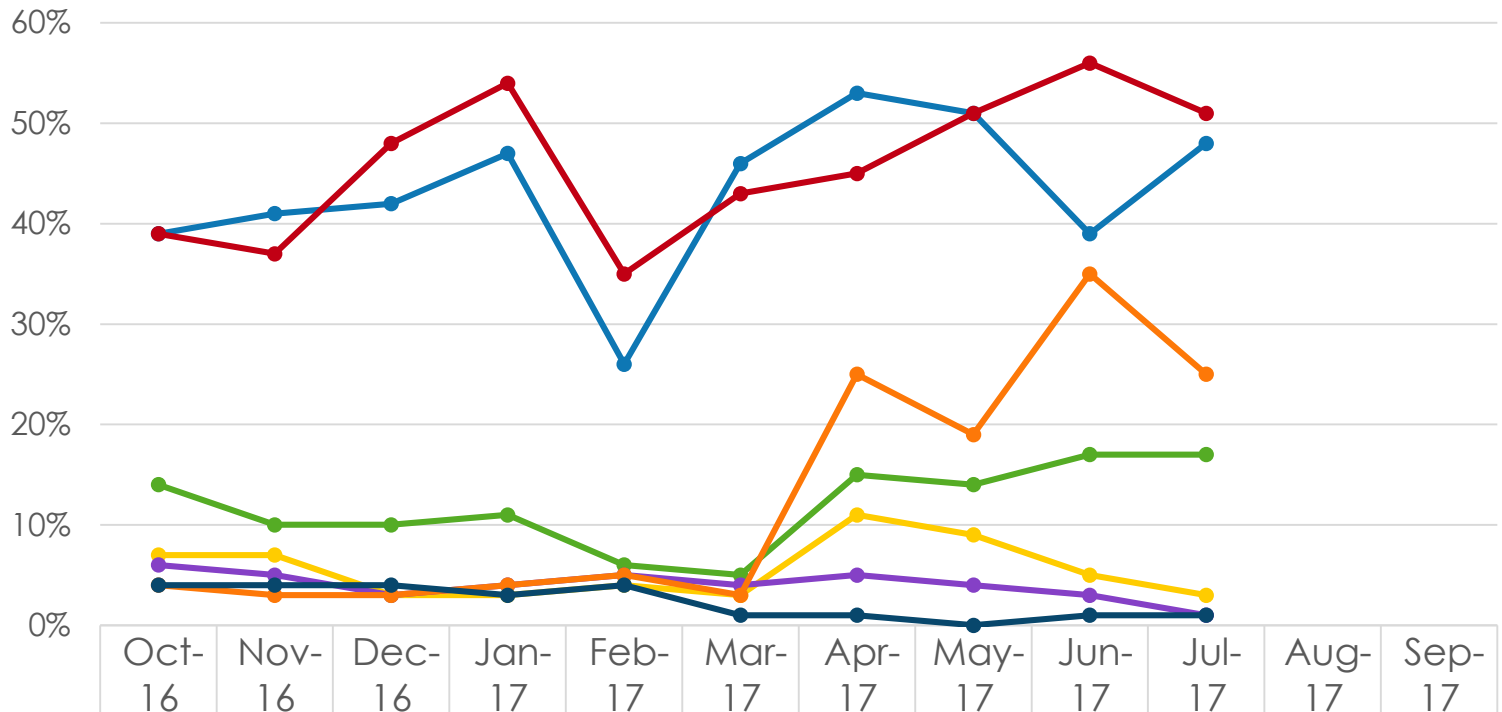
Objectives

- 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 (Q5)
 - Office Lady/ Salary Woman (Gender/ Q25 Office worker- non-managerial)
 - Group Tour (Q6)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Silver (QF Age 60+)
 - Wedding (Q5A)
 - Repeat Visitor (Q3)
 - 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

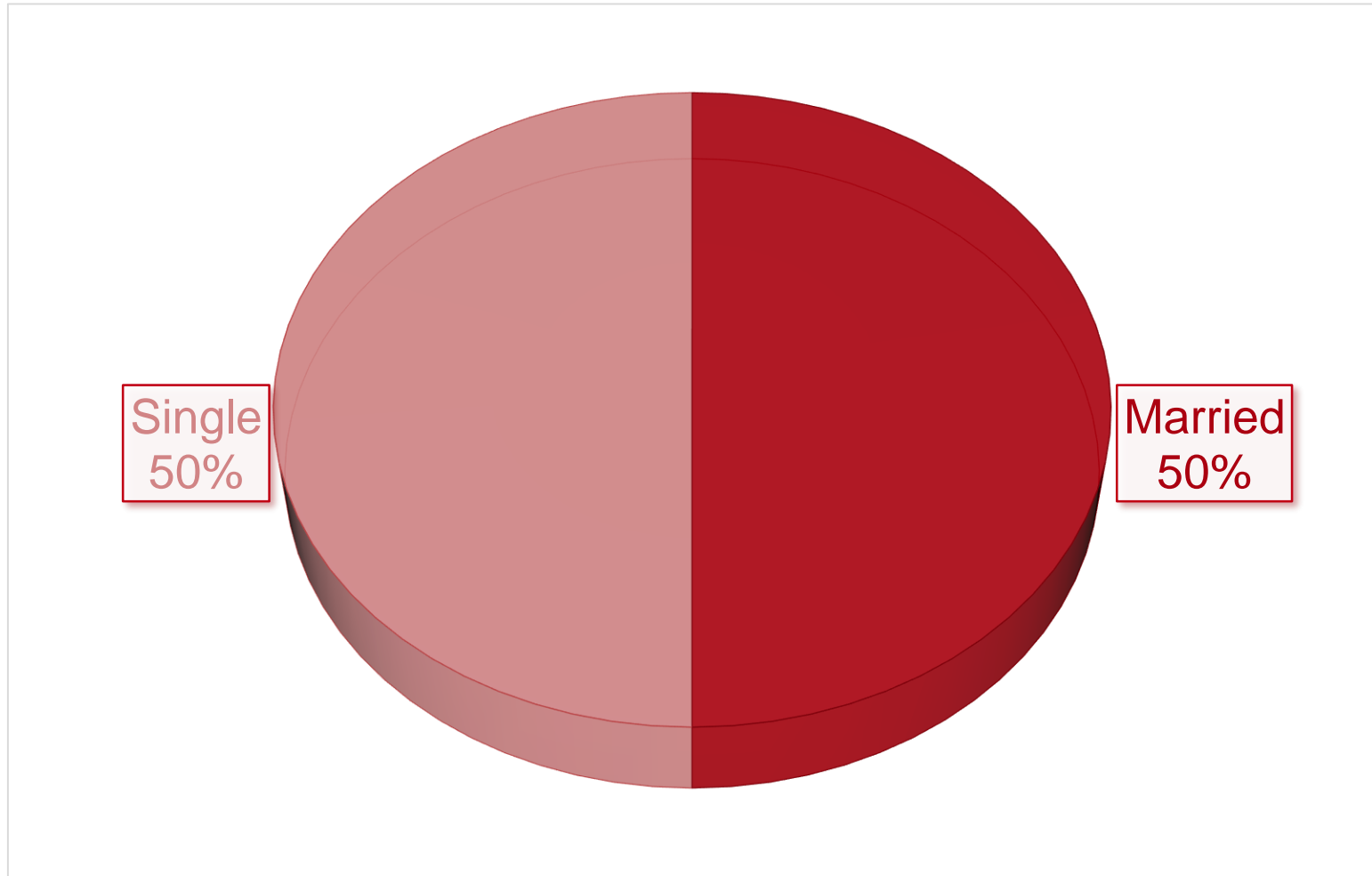


| | | | | | | | | | | | | |
|-------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|--|
| Family | 39% | 41% | 42% | 47% | 26% | 46% | 53% | 51% | 39% | 48% | | |
| Repeat | 39% | 37% | 48% | 54% | 35% | 43% | 45% | 51% | 56% | 51% | | |
| Office Lady | 14% | 10% | 10% | 11% | 6% | 5% | 15% | 14% | 17% | 17% | | |
| Wedding | 7% | 7% | 3% | 3% | 4% | 3% | 11% | 9% | 5% | 3% | | |
| Silver | 6% | 5% | 3% | 4% | 5% | 4% | 5% | 4% | 3% | 1% | | |
| Group | 4% | 3% | 3% | 4% | 5% | 3% | 25% | 19% | 35% | 25% | | |
| MICE | 4% | 4% | 4% | 3% | 4% | 1% | 1% | 0% | 1% | 1% | | |

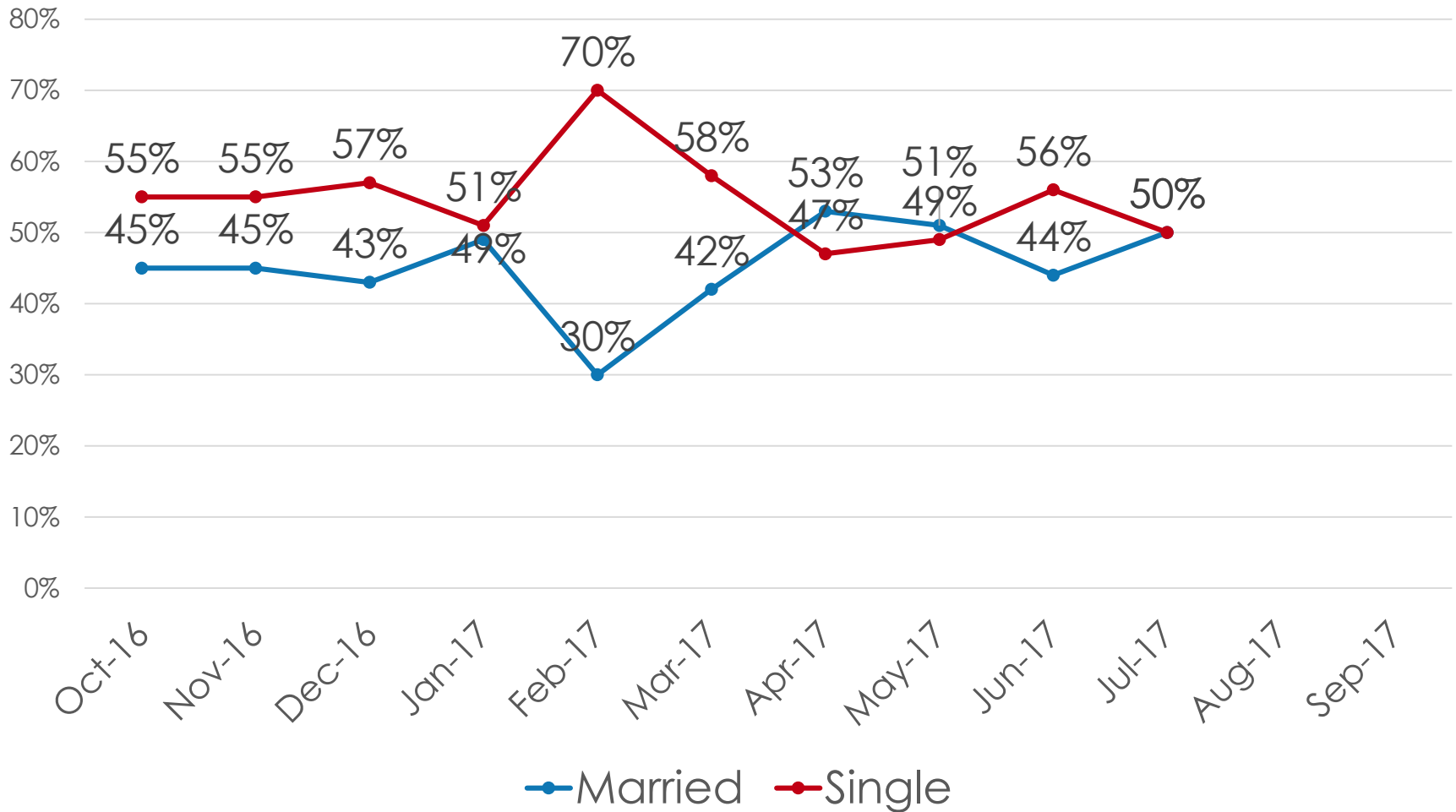
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

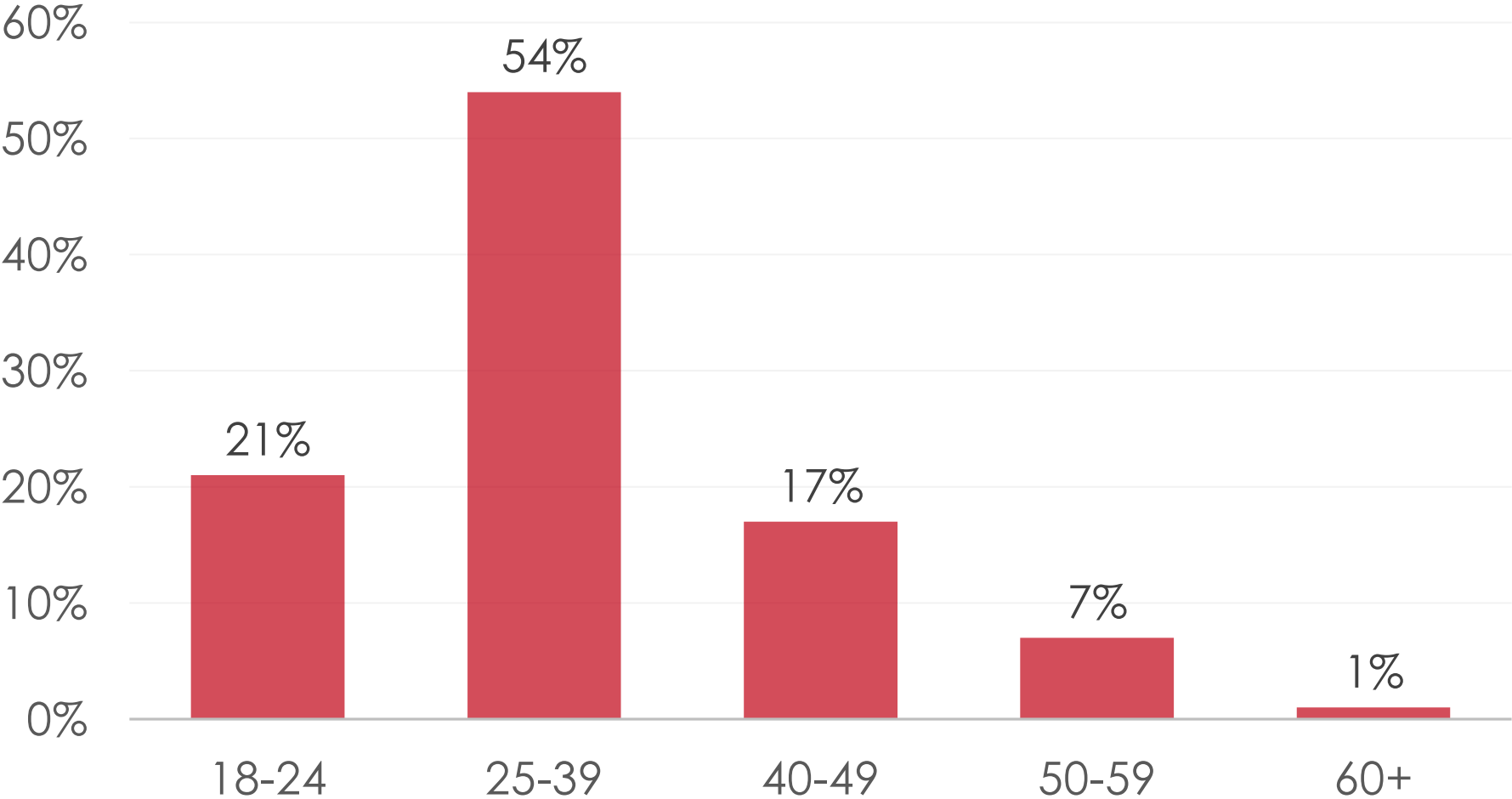
**GVB EXIT SURVEY
QE MARITAL STATUS**

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|----|---------|-------|--------|----------------|-------------|---------|------|---------|------------|
| | | - | - | - | - | - | - | - | - |
| QE | Married | 50% | 92% | 54% | 29% | 100% | | 75% | 49% |
| | Single | 50% | 8% | 46% | 71% | | 100% | 25% | 51% |
| | Total | 350 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |

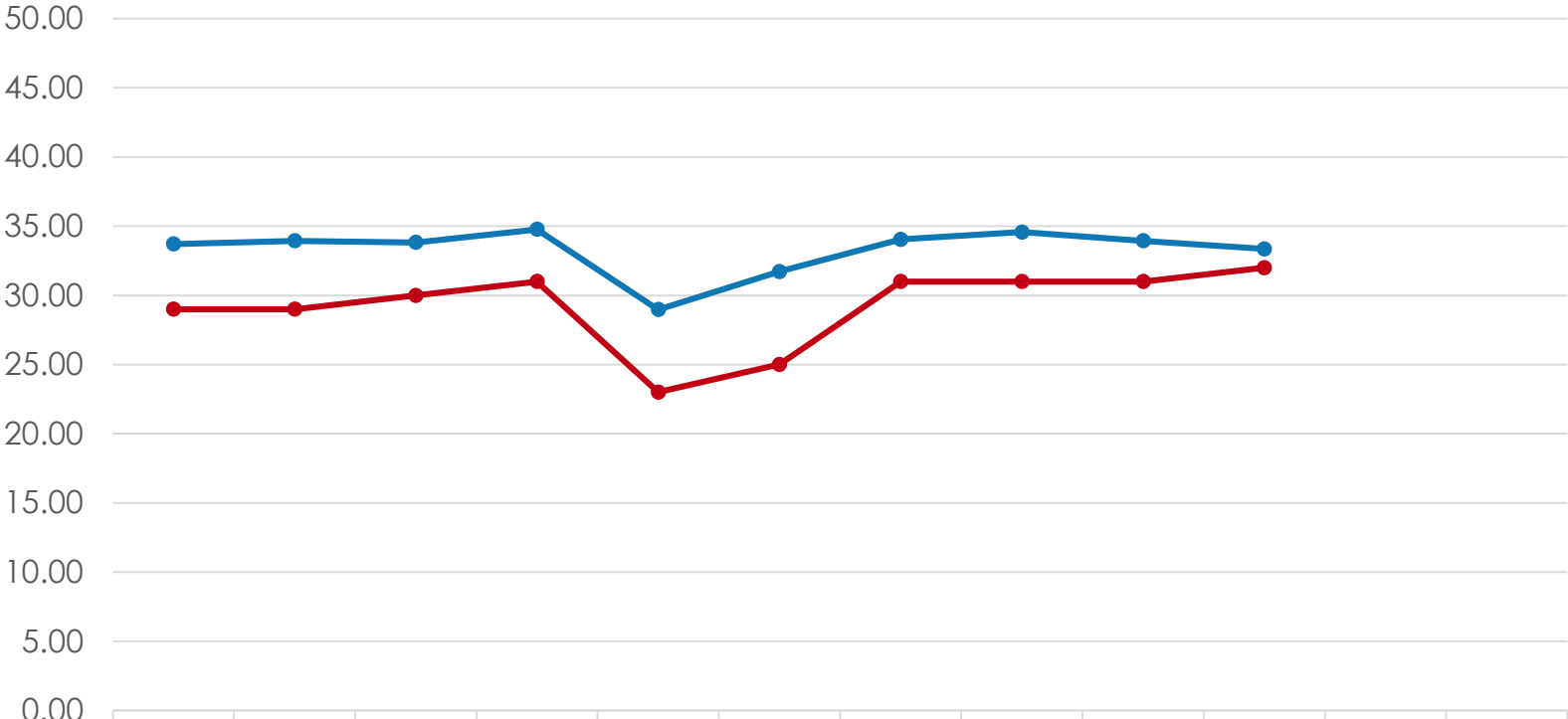
Prepared by Anthology Research

Age

MEAN = 33.35
MEDIAN = 32



Age – FY2017 Tracking



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| MEAN | 33.71 | 33.94 | 33.83 | 34.77 | 28.97 | 31.72 | 34.04 | 34.57 | 33.94 | 33.35 | | |
| MEDIAN | 29 | 29 | 30 | 31 | 23 | 25 | 31 | 31 | 31 | 32 | | |

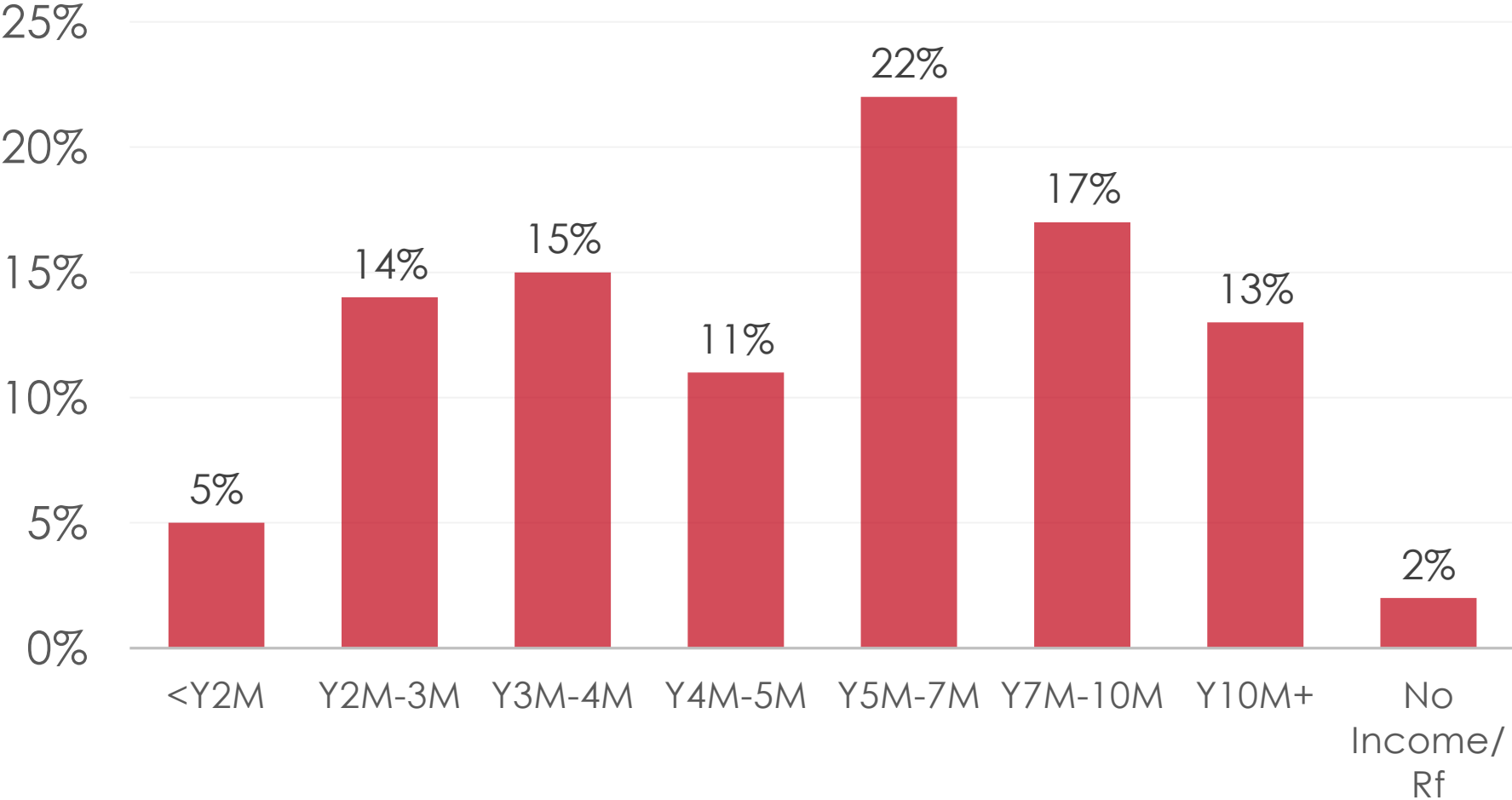
Age – Key Segments

GVB EXIT SURVEY AGE

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|----|--------|-------|--------|----------------|-------------|---------|-------|---------|------------|
| | | - | - | - | - | - | - | - | - |
| QF | 18-24 | 21% | 3% | 14% | 15% | | | | 16% |
| | 25-39 | 54% | 57% | 54% | 63% | | 100% | 75% | 53% |
| | 40-49 | 17% | 27% | 21% | 14% | | | 17% | 19% |
| | 50-59 | 7% | 12% | 9% | 8% | | | 8% | 11% |
| | 60+ | 1% | 2% | 2% | | 100% | | | 1% |
| | Total | 350 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |
| QF | Mean | 33.35 | 38.57 | 35.56 | 32.75 | 63.33 | 26.00 | 34.92 | 35.10 |
| | Median | 32 | 38 | 35 | 30 | 63 | 26 | 33 | 33 |

Prepared by Anthology Research

Annual Household Income



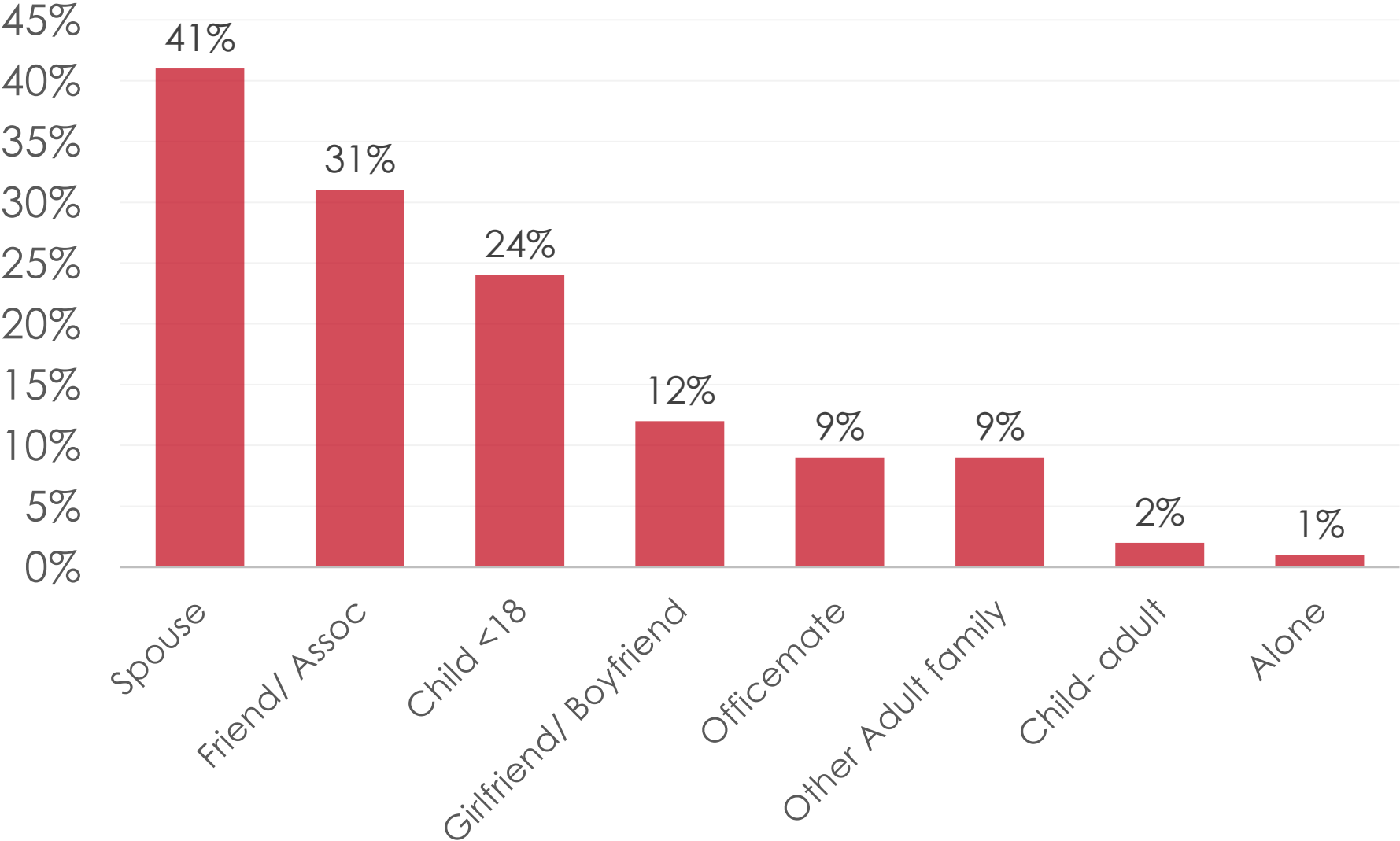
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|-----|--------------------------|-------|--------|----------------|-------------|---------|------|---------|------------|
| | | - | - | - | - | - | - | - | - |
| Q26 | Less than ¥2 million | 5% | 1% | 4% | 5% | | | | 2% |
| | ¥2,000,001 ~ ¥3,000,000 | 14% | 6% | 10% | 31% | | | 8% | 14% |
| | ¥3,000,001 ~ ¥4,000,000 | 15% | 9% | 12% | 15% | | 50% | 25% | 21% |
| | ¥4,000,001 ~ ¥5,000,000 | 11% | 11% | 11% | 7% | | | | 9% |
| | ¥5,000,001 ~ ¥7,000,000 | 22% | 22% | 21% | 15% | | 50% | 25% | 22% |
| | ¥7,000,001 ~ ¥10 million | 17% | 30% | 22% | 15% | 100% | | 17% | 16% |
| | ¥10 million or more | 13% | 21% | 18% | 13% | | | 25% | 13% |
| | No Income | 2% | 1% | 2% | | | | | 2% |
| | Total | 334 | 159 | 170 | 55 | 2 | 2 | 12 | 86 |

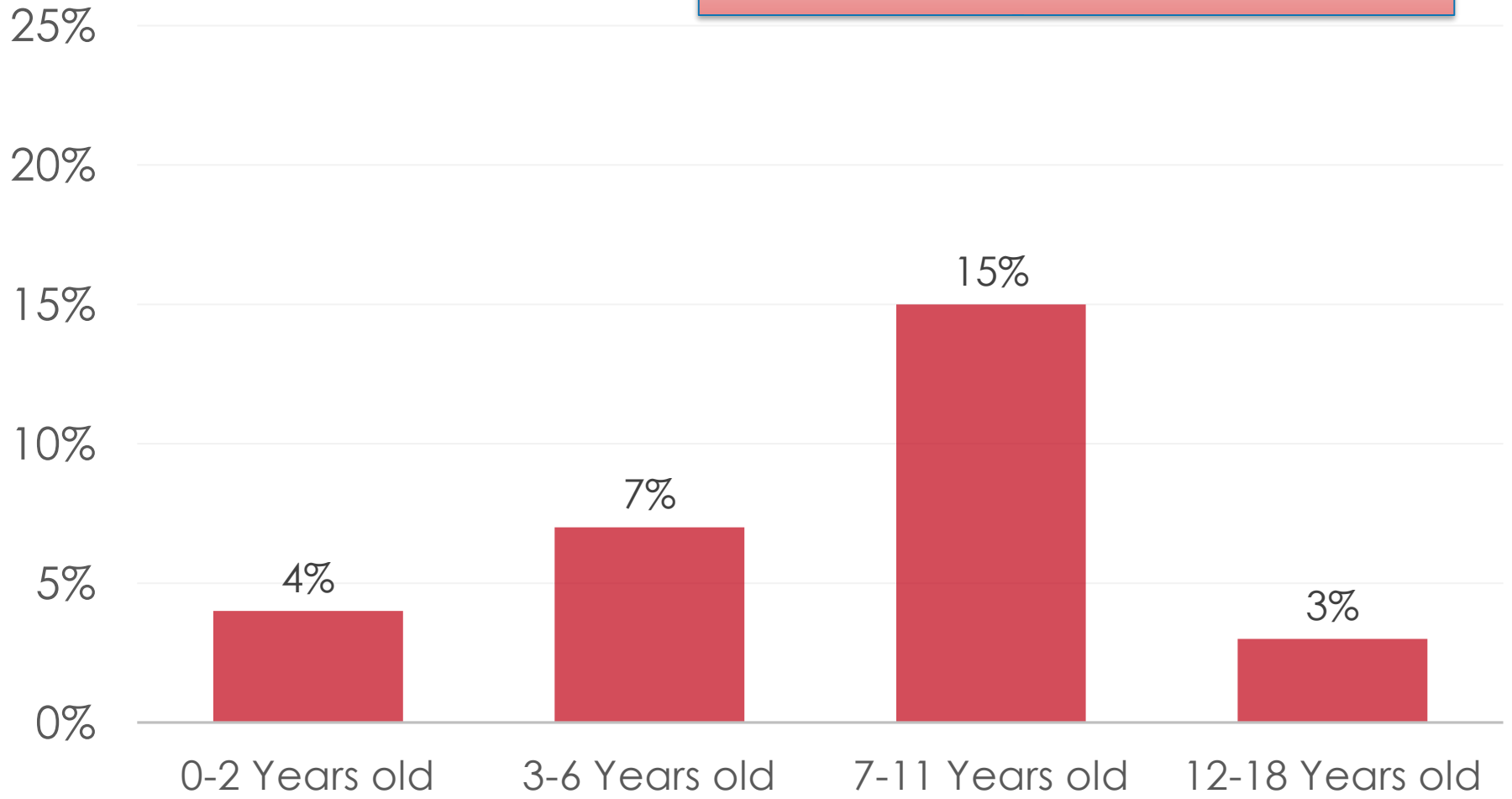
Prepared by Anthology Research

Travel Party

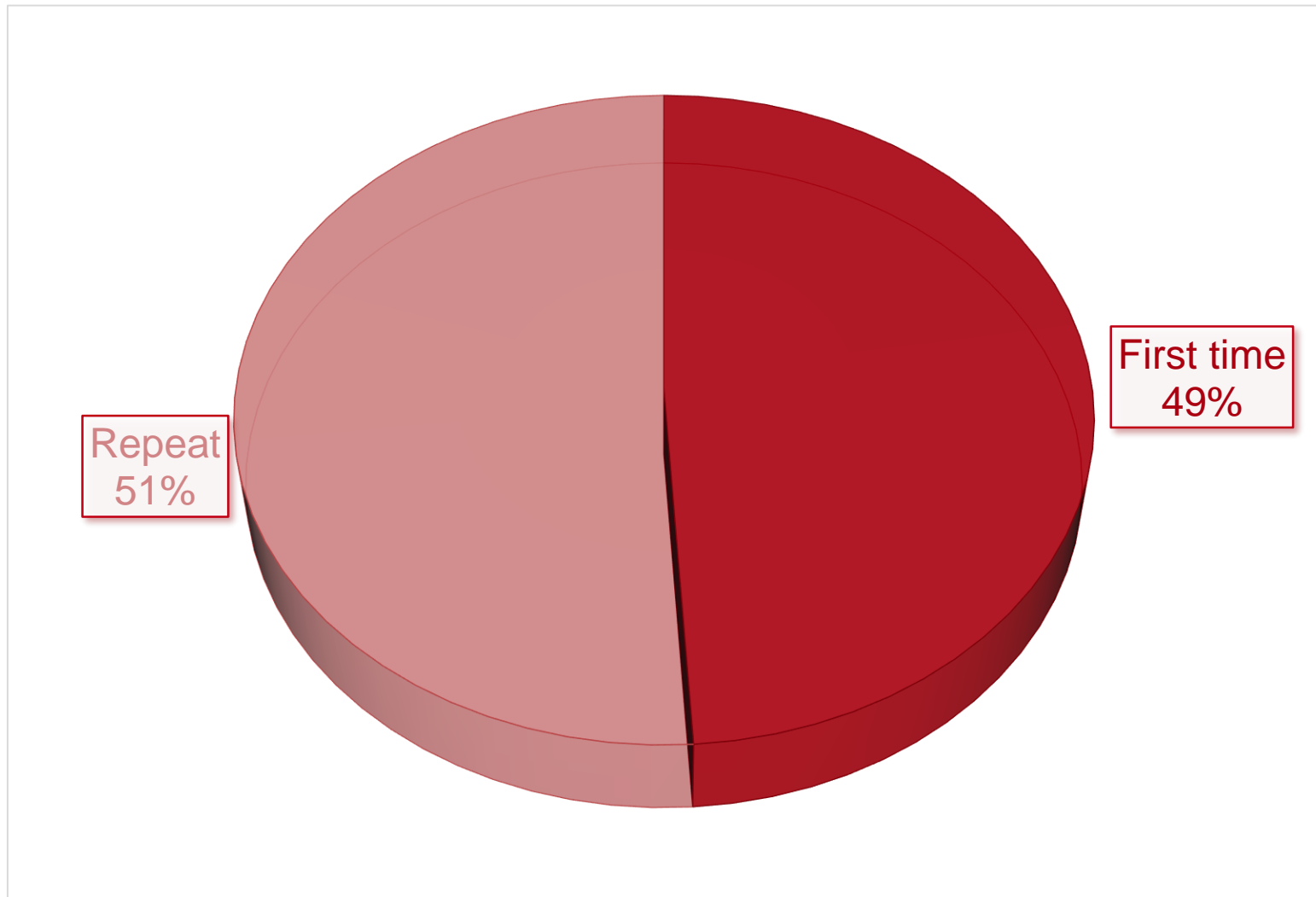


Travel Party - Children

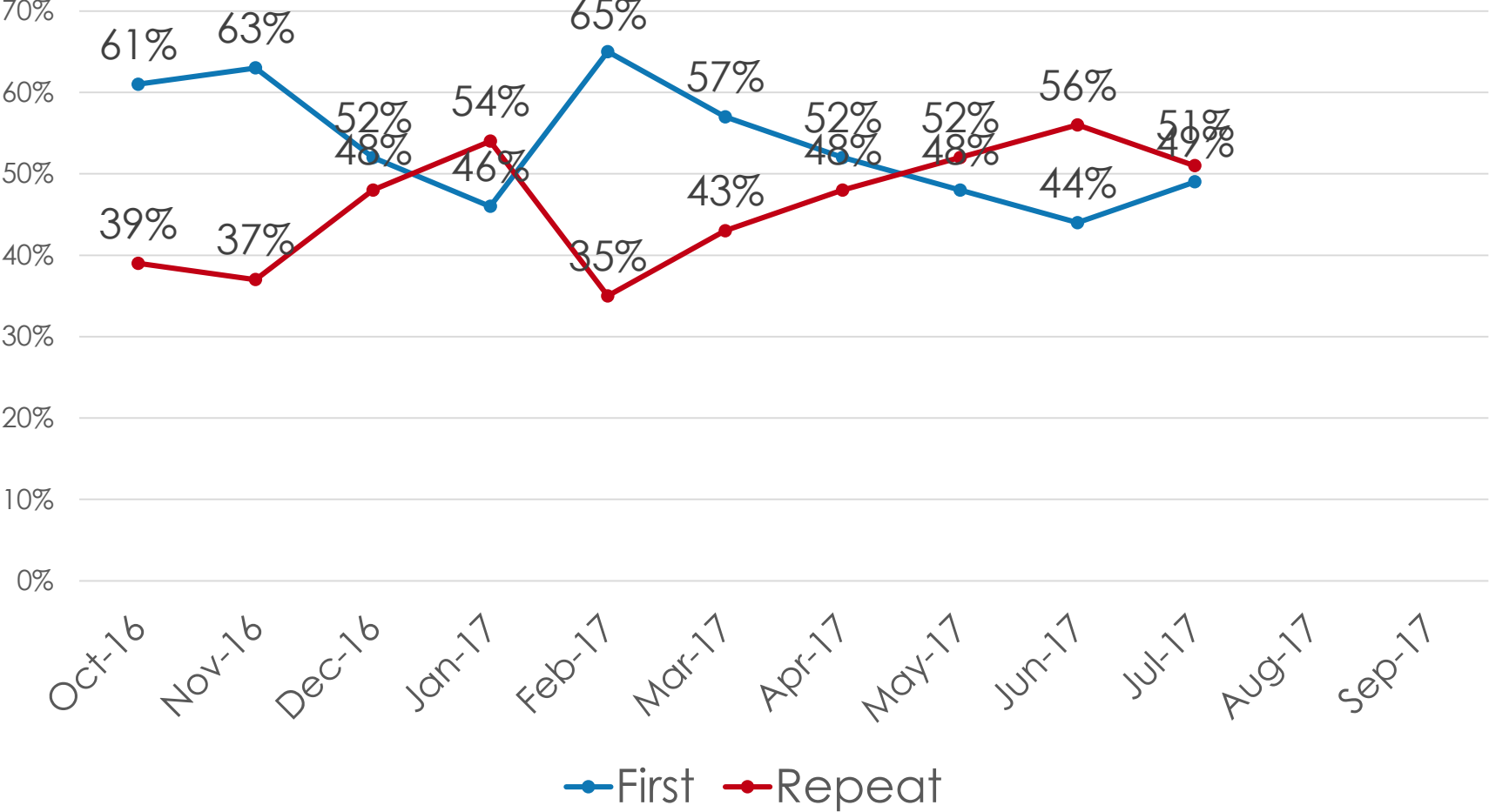
24% TRAVELING WITH A CHILD



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

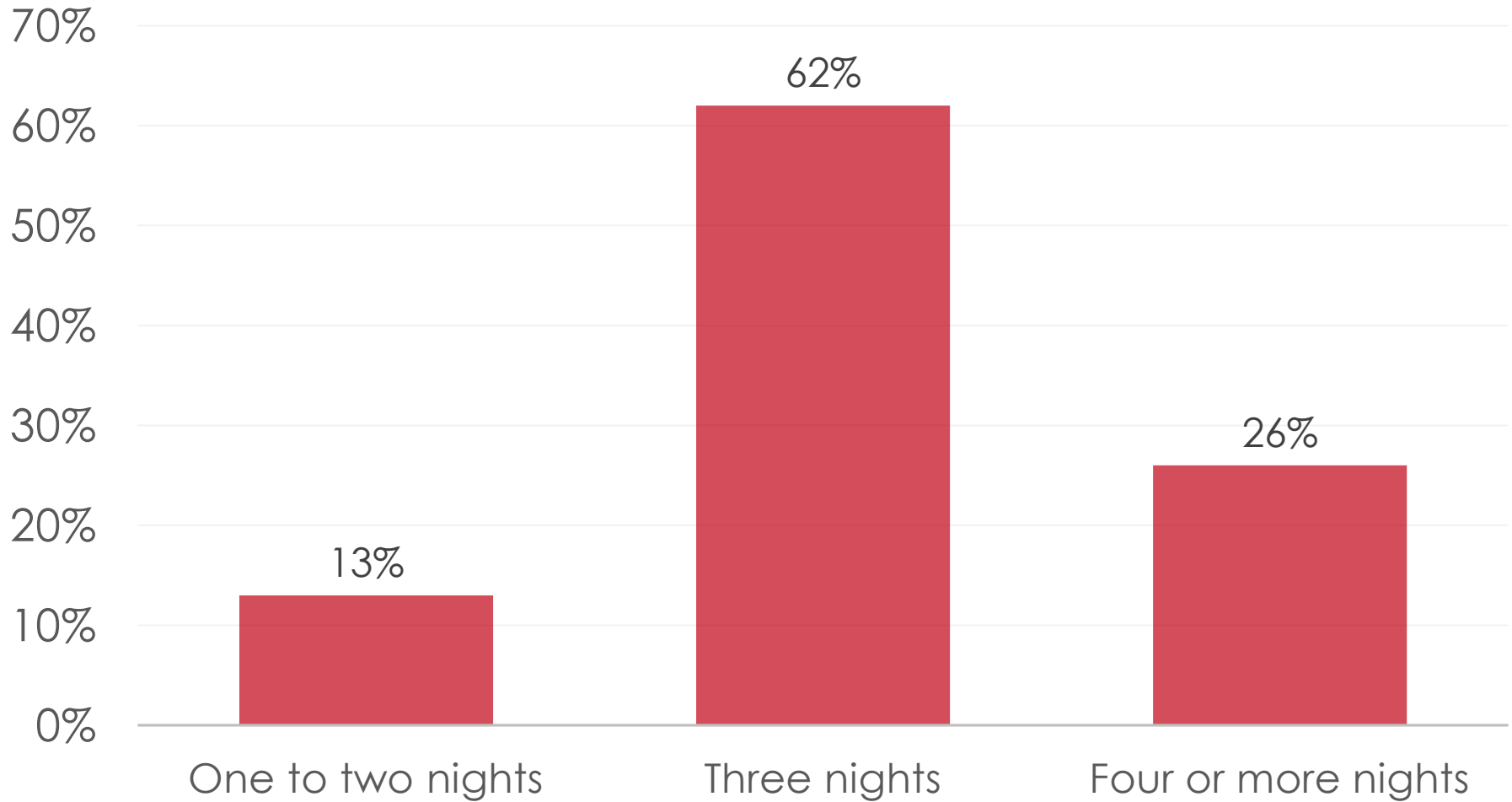
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|----|----------|-------|--------|----------------|-------------|---------|------|---------|------------|
| | | - | - | - | - | - | - | - | - |
| Q3 | 1st time | 49% | 44% | | 53% | | 50% | 58% | 51% |
| | Repeat | 51% | 56% | 100% | 47% | 100% | 50% | 42% | 49% |
| | Total | 350 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |
| Q3 | Mean | 2.43 | 2.80 | 3.80 | 2.61 | 9.00 | 1.50 | 1.42 | 2.91 |
| | Median | 2 | 2 | 2 | 1 | 10 | 2 | 1 | 1 |

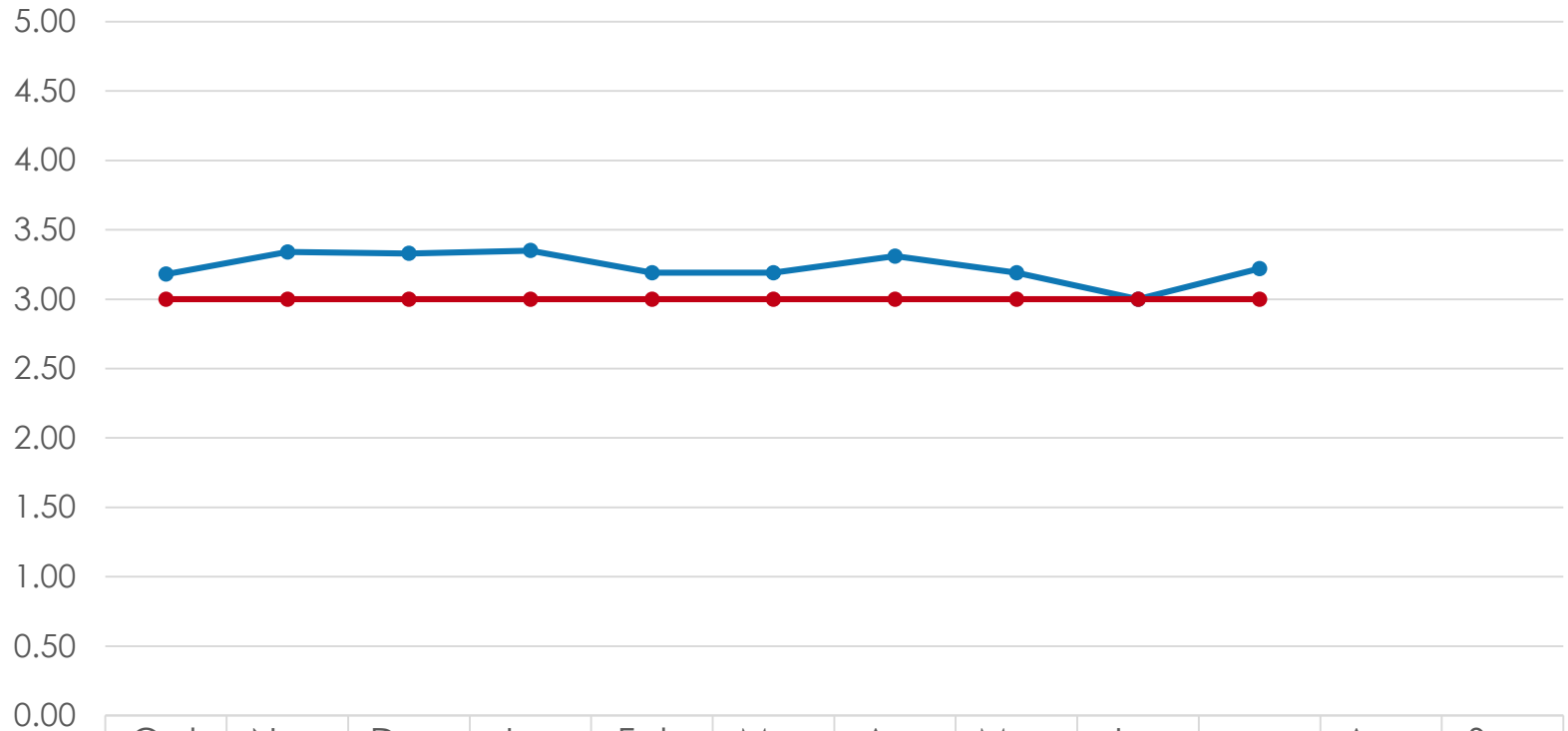
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 3.22
MEDIAN NUMBER OF NIGHTS = 3



Length of Stay – FY2017 Tracking



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| MEAN | 3.18 | 3.34 | 3.33 | 3.35 | 3.19 | 3.19 | 3.31 | 3.19 | 3.00 | 3.22 | | |
| MEDIAN | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | | |

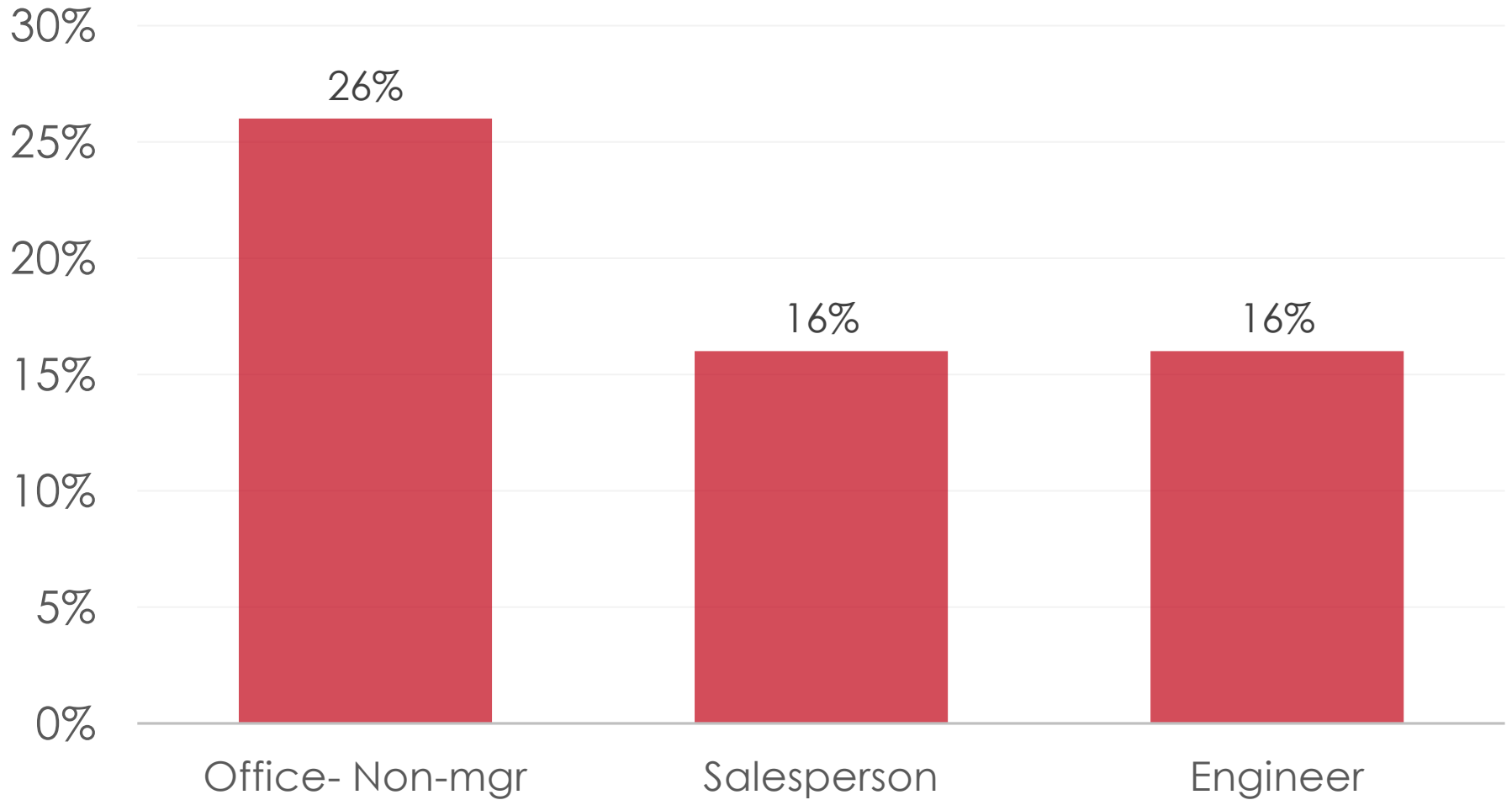
Length of Stay – Key Segments

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 | 13% | 7% | 9% | 15% | 33% | 50% | | 17% |
| | 3 | 62% | 53% | 64% | 68% | 33% | | 67% | 64% |
| | 4+ | 26% | 40% | 27% | 17% | 33% | 50% | 33% | 19% |
| | Total | 350 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |
| SA | Mean | 3.22 | 3.47 | 3.29 | 3.08 | 3.33 | 3.00 | 3.42 | 3.07 |
| | Median | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

Prepared by Anthology Research

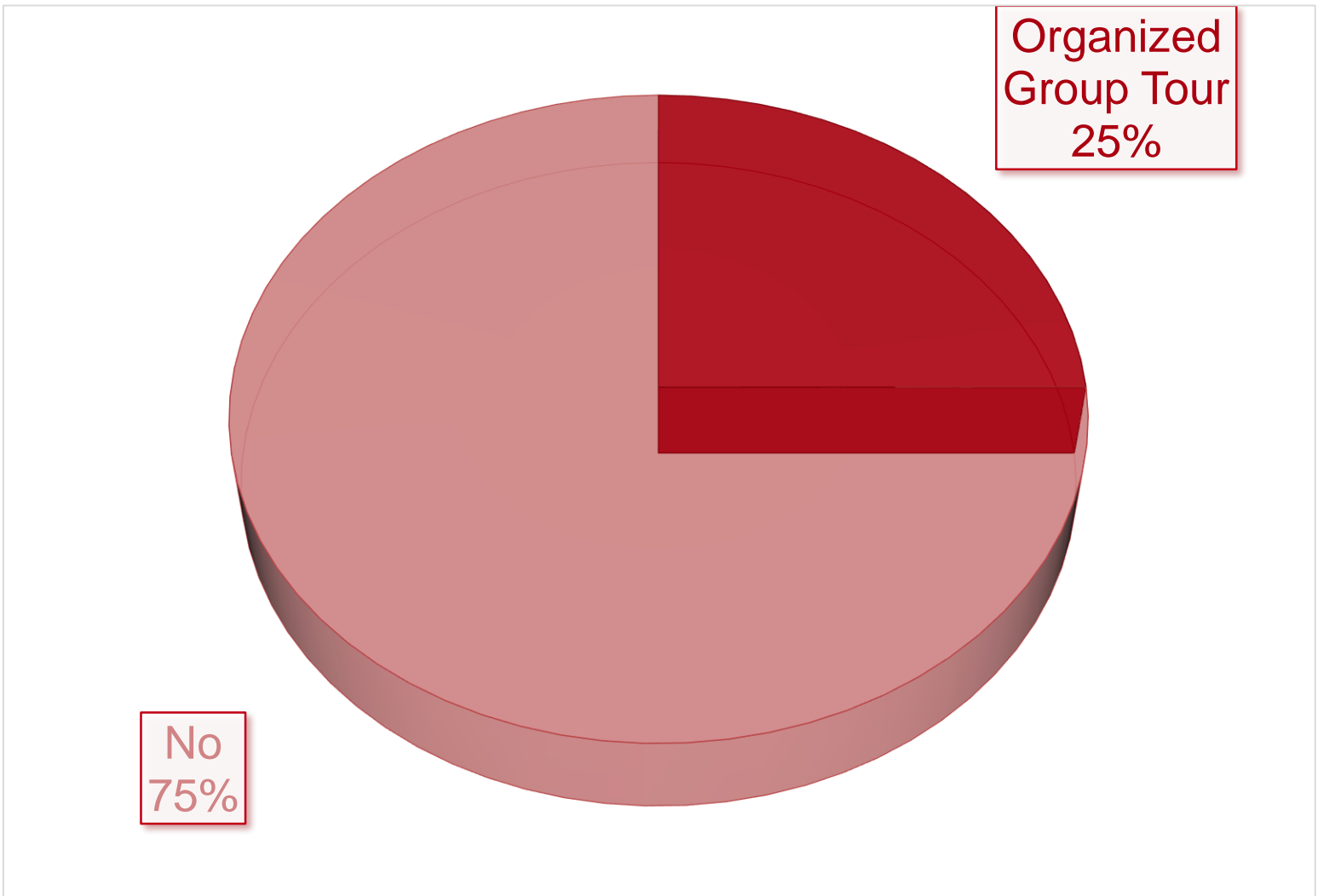
Occupation – Top Responses (10%+)



SECTION 2

TRAVEL PLANNING

Organized Group Tour

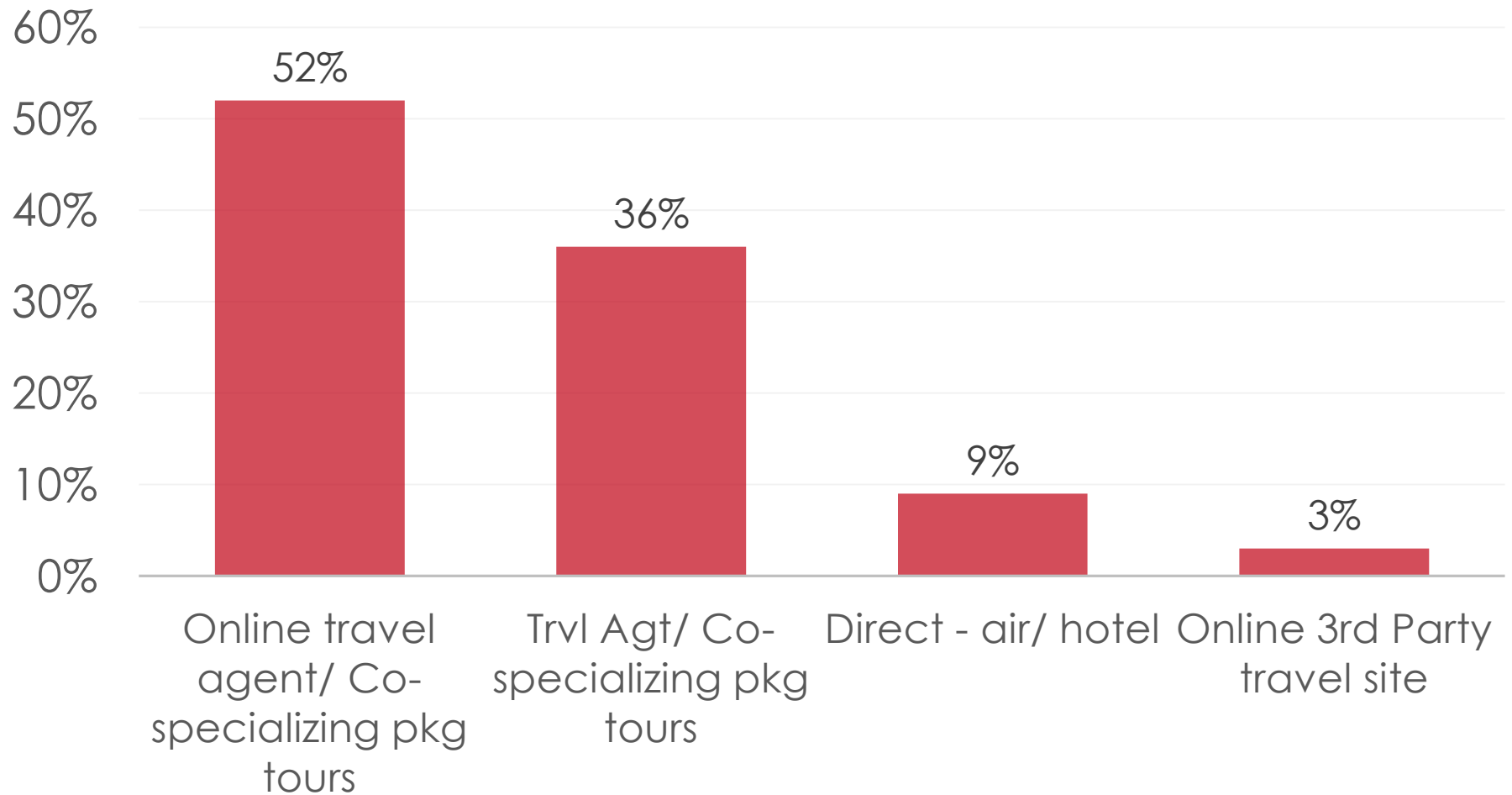


Organized Group Tour– FY2017 Tracking

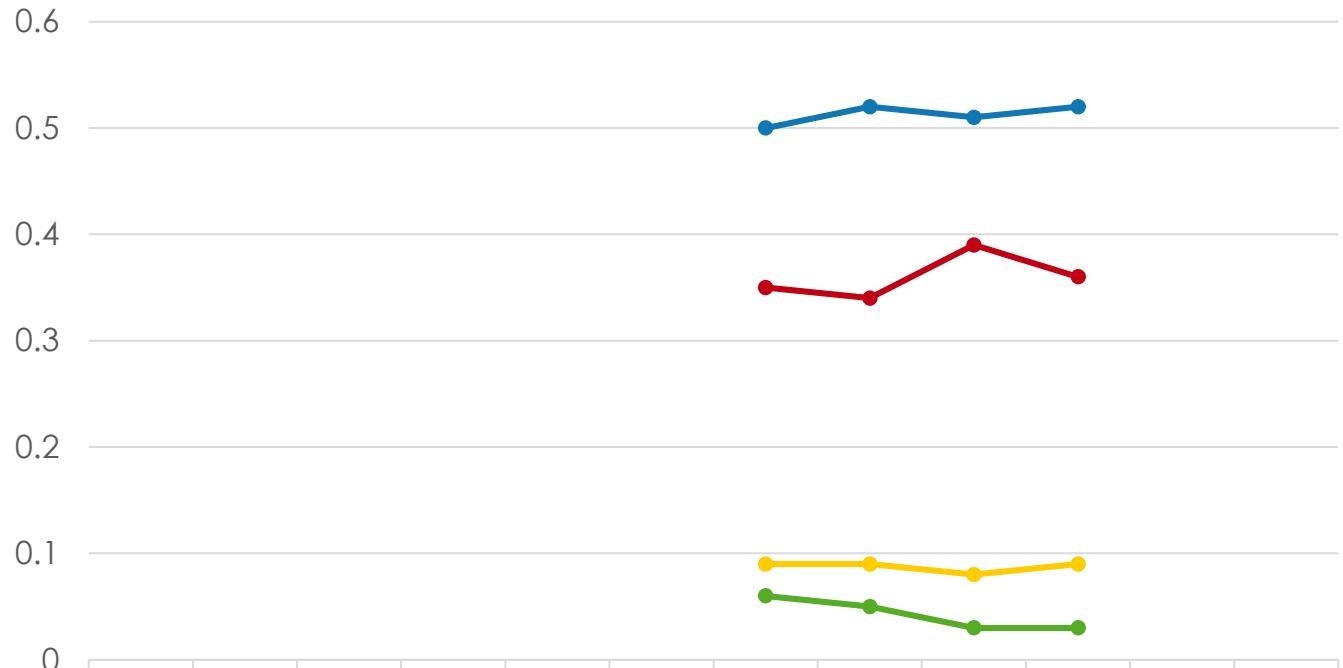


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Group Tour | | | | | | | 26% | 19% | 35% | 25% | | |

Travel Arrangements - Sources

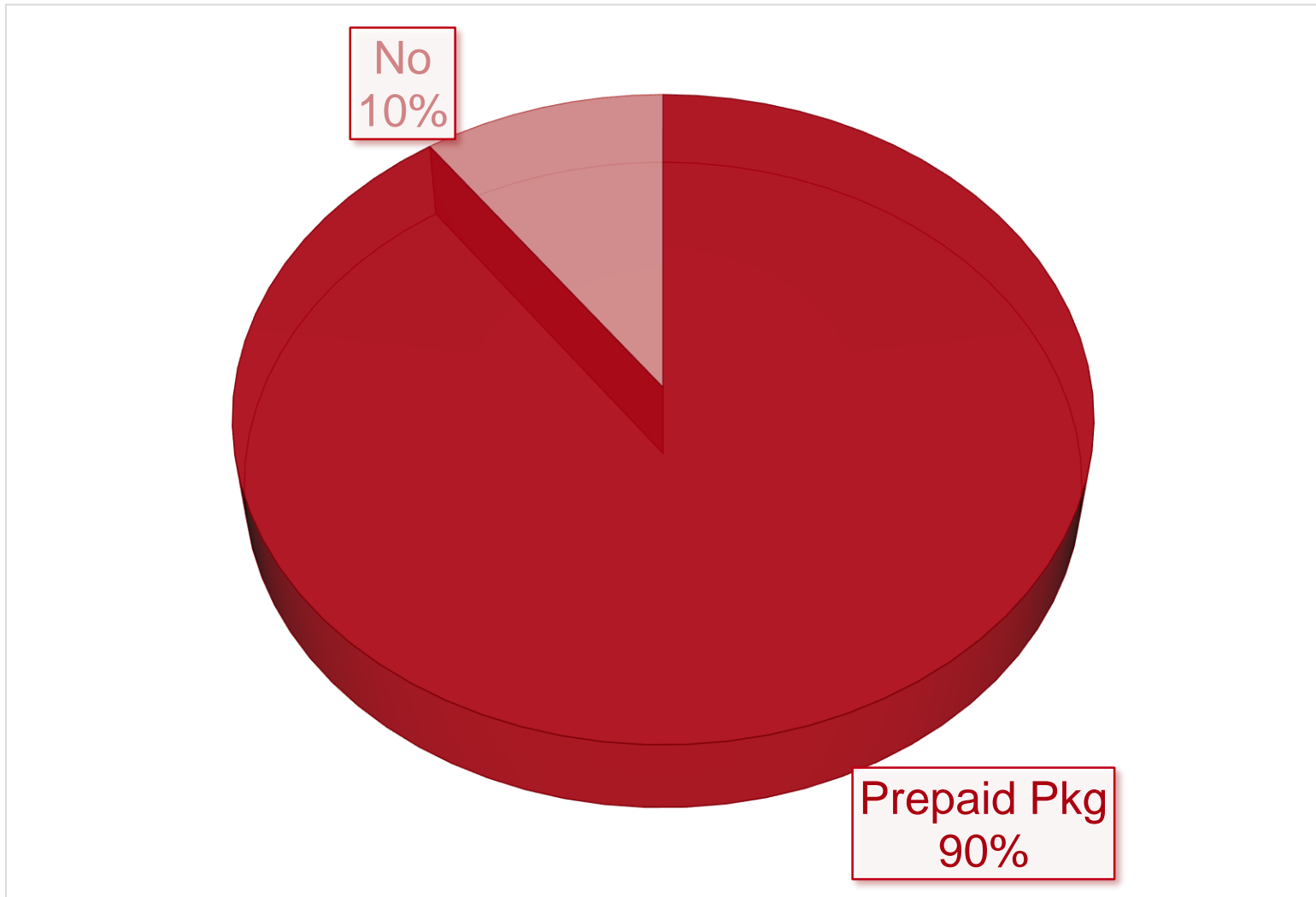


Travel Arrangements - Sources

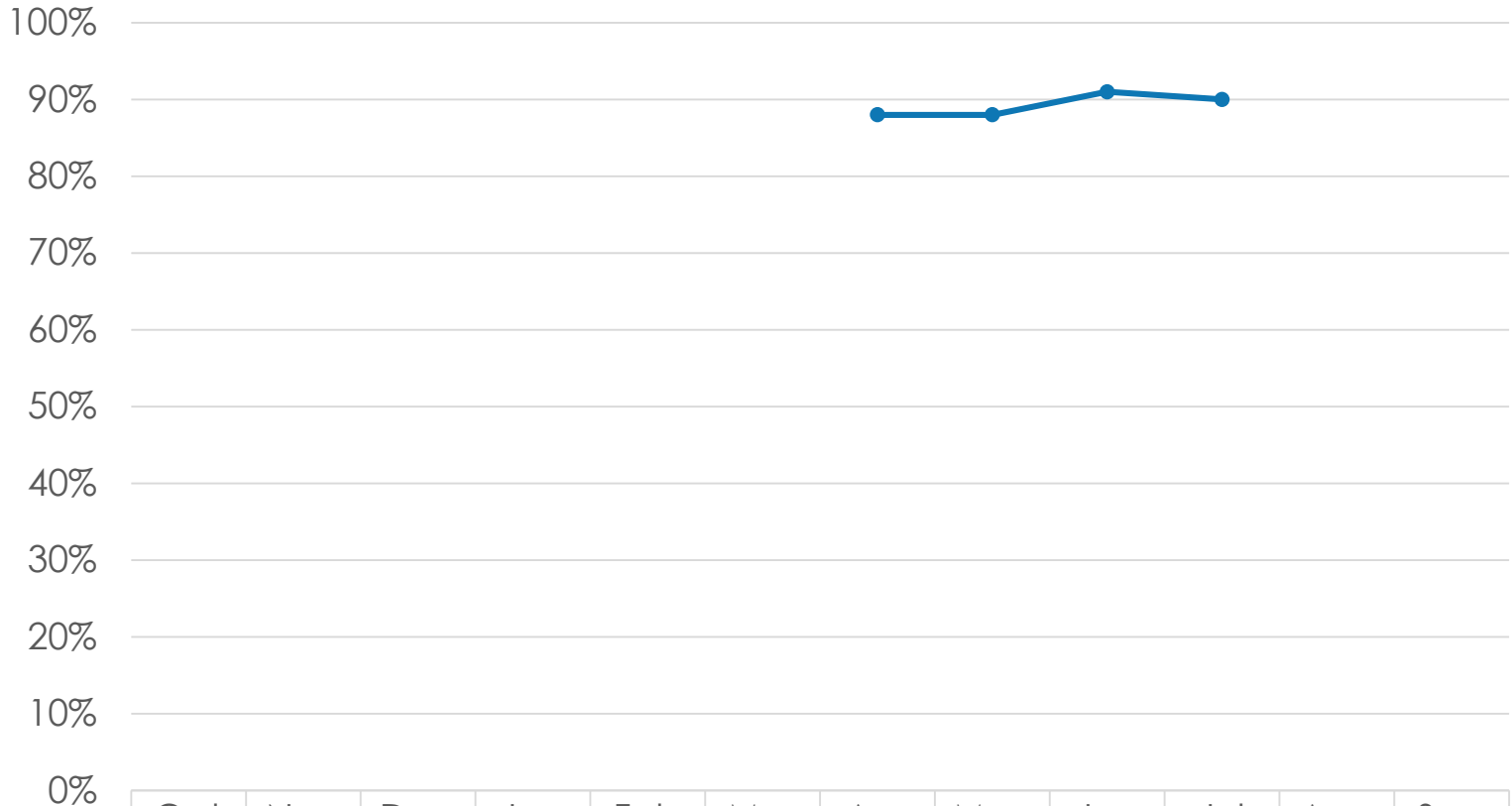


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Online travel agent | | | | | | | 50% | 52% | 51% | 52% | | |
| Trvl Agt/ Co- Pkg Tour | | | | | | | 35% | 34% | 39% | 36% | | |
| Online 3rd Party | | | | | | | 6% | 5% | 3% | 3% | | |
| Direct Air/ Hotel | | | | | | | 9% | 9% | 8% | 9% | | |

Prepaid Pkg Trip

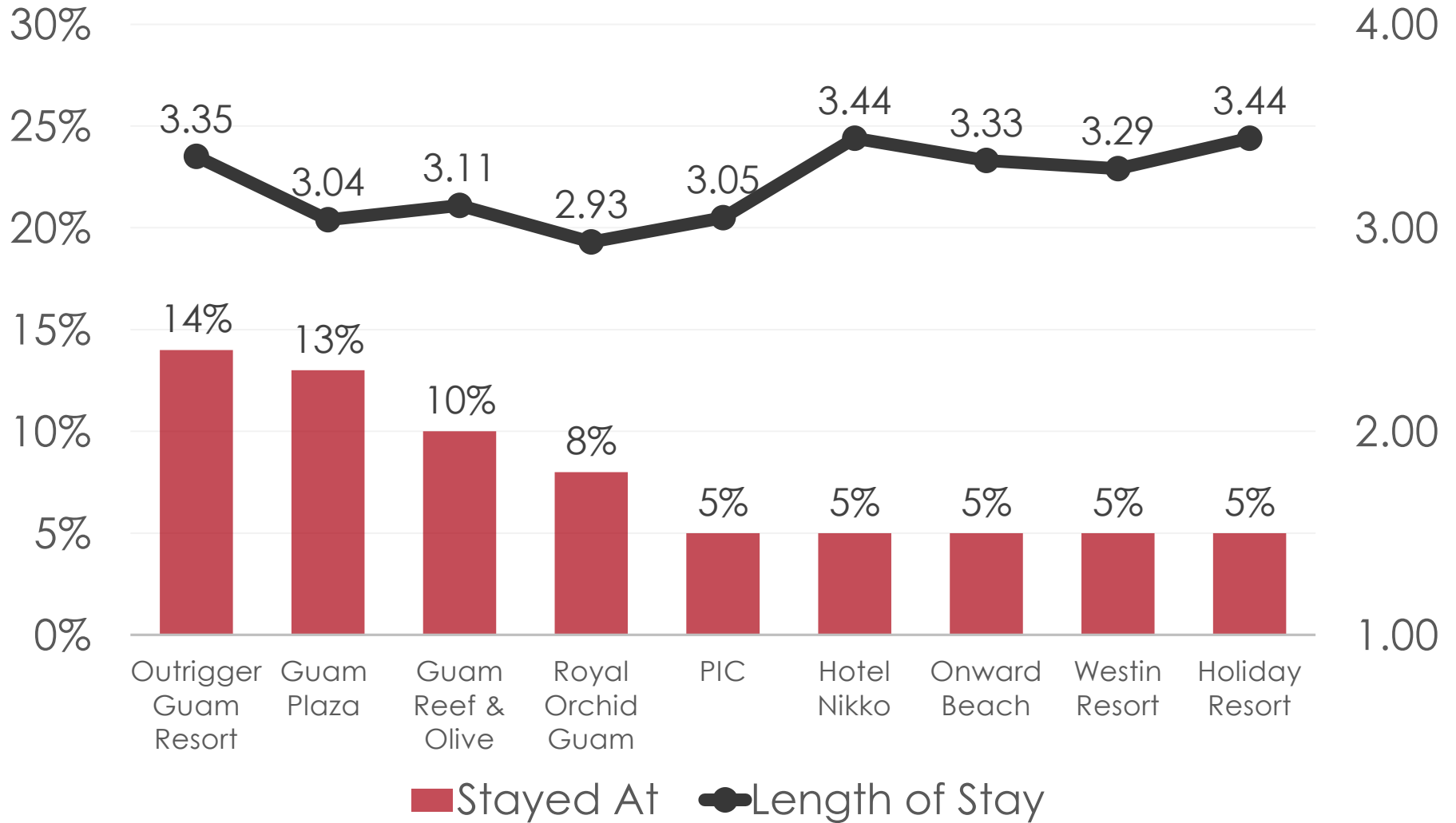


Prepaid Pkg Trip

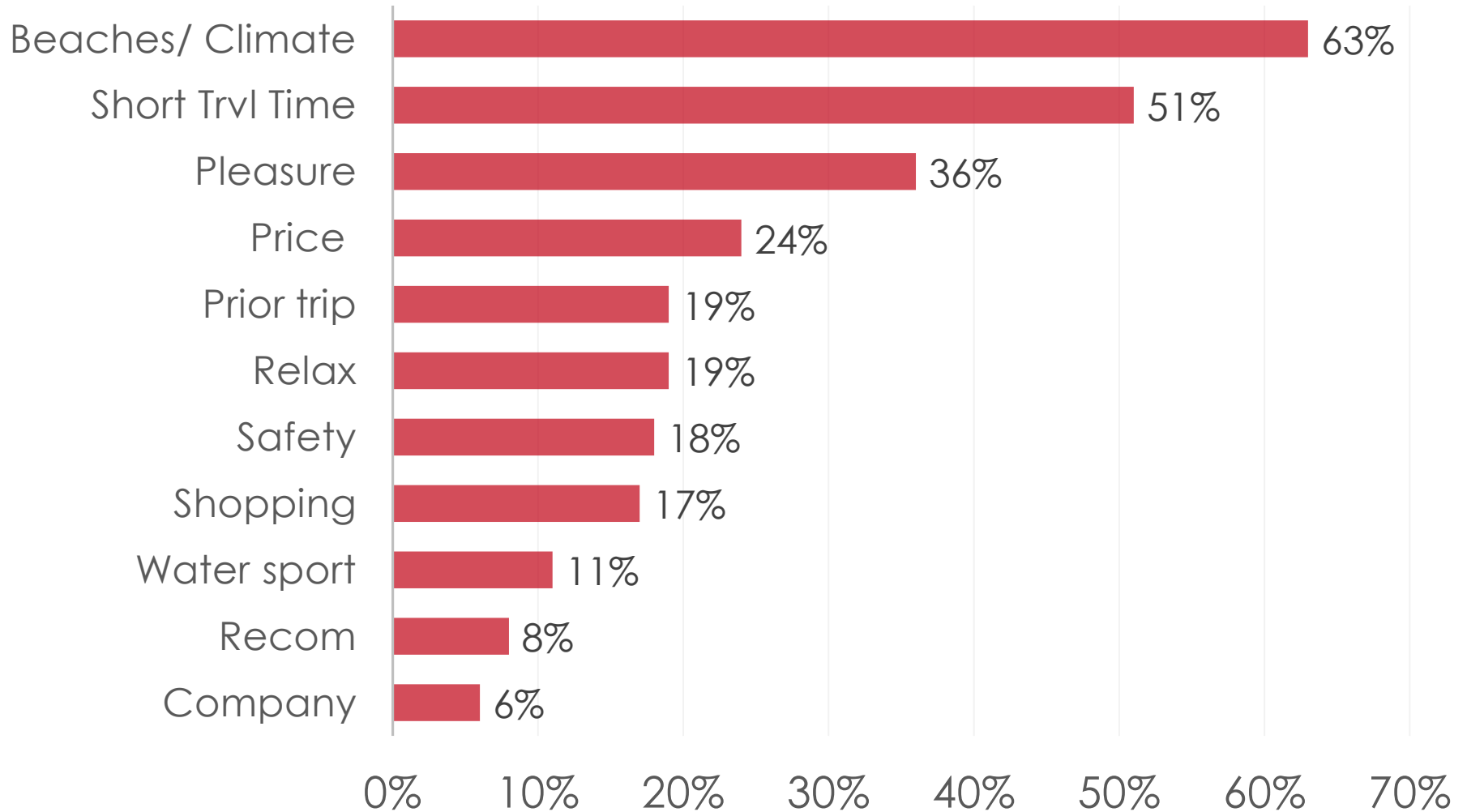


| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Prepaid Pkg | | | | | | | 88% | 88% | 91% | 90% | | |

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 | 63% | 65% | 59% | 68% | 100% | 50% | 42% | 56% |
| | Short travel time (not too far from home) | 51% | 56% | 52% | 64% | 67% | | 25% | 39% |
| | Pleasure/ vacation | 36% | 35% | 34% | 34% | | | 33% | 29% |
| | Price of the tour package | 24% | 23% | 23% | 17% | | | | 26% |
| | A previous visit | 19% | 19% | 38% | 12% | | 50% | | 18% |
| | Just to relax | 19% | 18% | 21% | 24% | 33% | | | 13% |
| | It is a safe place to spend a vacation | 18% | 23% | 18% | 24% | 67% | | 8% | 19% |
| | Shopping | 17% | 12% | 16% | 19% | | | | 18% |
| | Water sports (snorkeling, windsurfing, parasailing) | 11% | 10% | 6% | 10% | | | 17% | 7% |
| | Recommendation of friend/ relative/ travel agency | 8% | 8% | 9% | 8% | | | 17% | 9% |
| | Company/ business trip | 6% | 2% | 3% | 3% | | 50% | | 21% |
| | Scuba diving | 4% | 4% | 2% | 3% | | | 8% | 2% |
| | Honeymoon | 4% | 8% | 2% | | | | 33% | 4% |
| | To Get Married/ attend Wedding | 3% | 7% | 3% | 2% | | | 100% | 6% |
| | To visit friends or relatives | 3% | 2% | 4% | 3% | | | | 7% |
| | To golf | 1% | 3% | 1% | | 33% | | 17% | 3% |
| | Adventure | 1% | | | | | 50% | | 1% |
| | My company sponsored me | 1% | | 1% | | | | | 3% |
| | Convention/ conference/ trade show/ meeting | 1% | | 1% | | | 100% | | 1% |
| | Organized sporting activity/ event | 1% | 1% | 1% | | | | | |
| | Total | 349 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |

SECTION 3

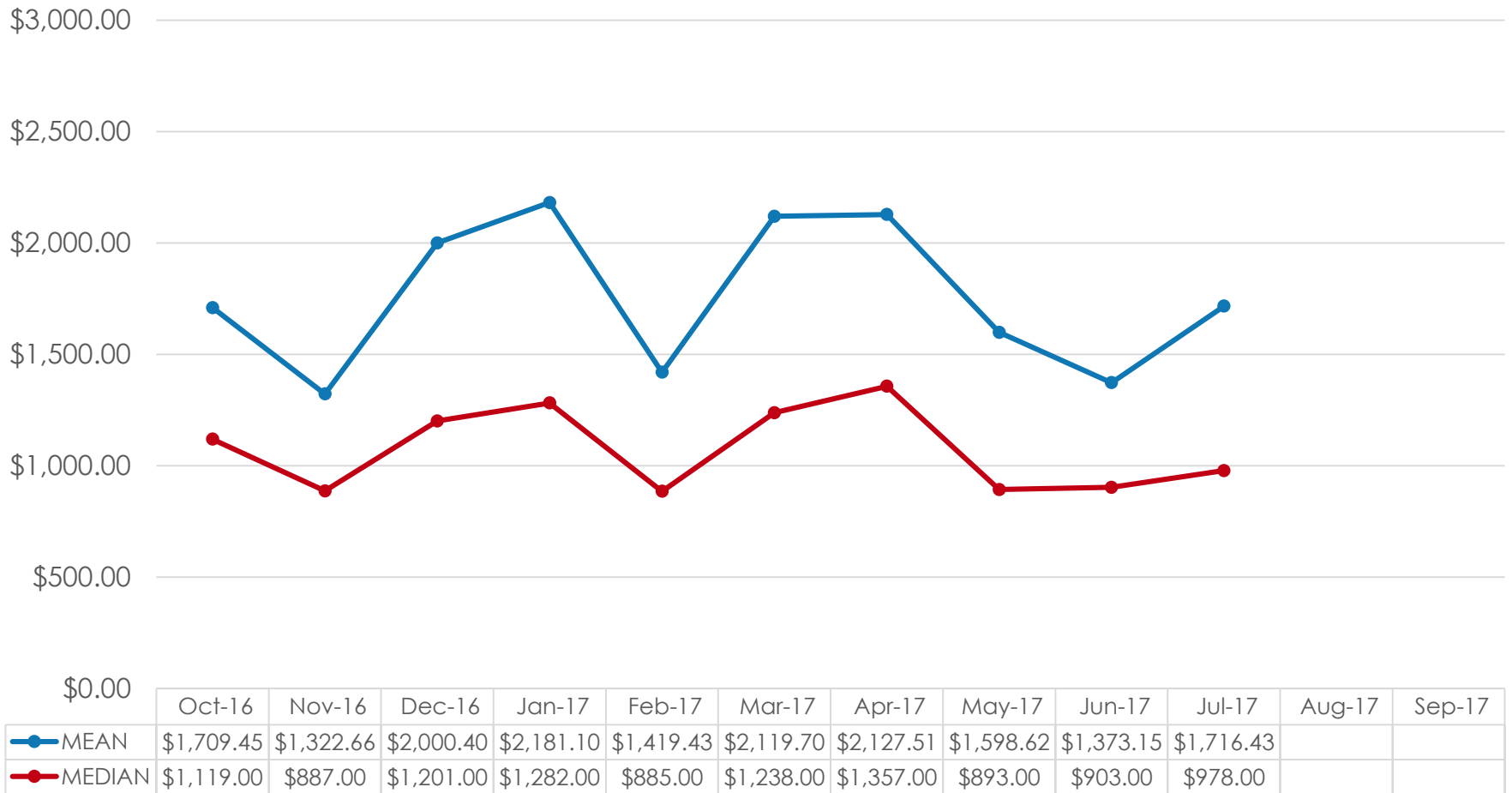
EXPENDITURES

Prepaid Expenditures

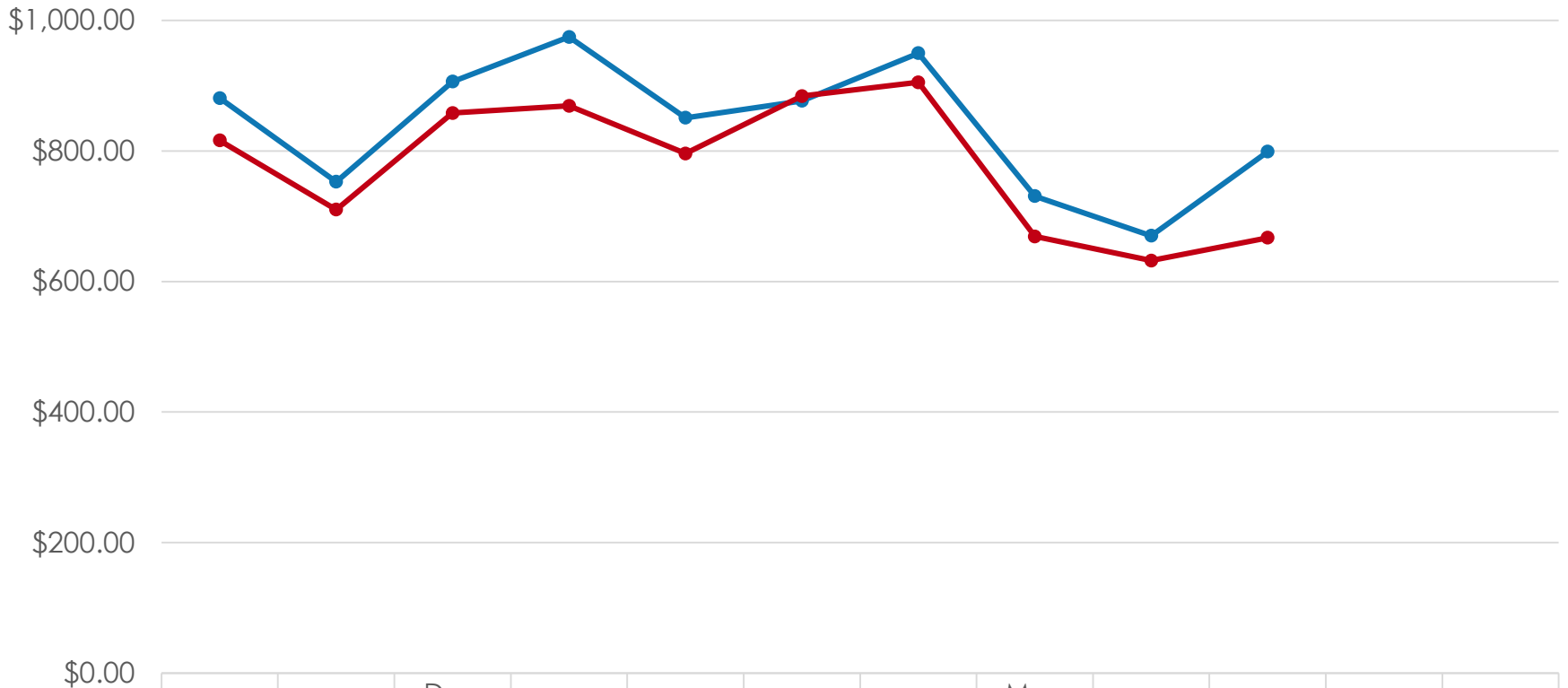
EXCHANGE RATE ¥112.42=\$1

- \$1,716.43 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$798.80 = overall mean average per person prepaid expenditures

Prepaid Entire Travel Party – FY2017 Tracking



Prepaid Per Person– FY2017 Tracking



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|--------|
| MEAN | \$880.84 | \$752.63 | \$906.16 | \$974.56 | \$850.86 | \$876.79 | \$949.83 | \$730.80 | \$670.11 | \$798.80 | | |
| MEDIAN | \$816.00 | \$710.00 | \$858.00 | \$869.00 | \$796.00 | \$884.00 | \$905.00 | \$669.00 | \$632.00 | \$667.00 | | |

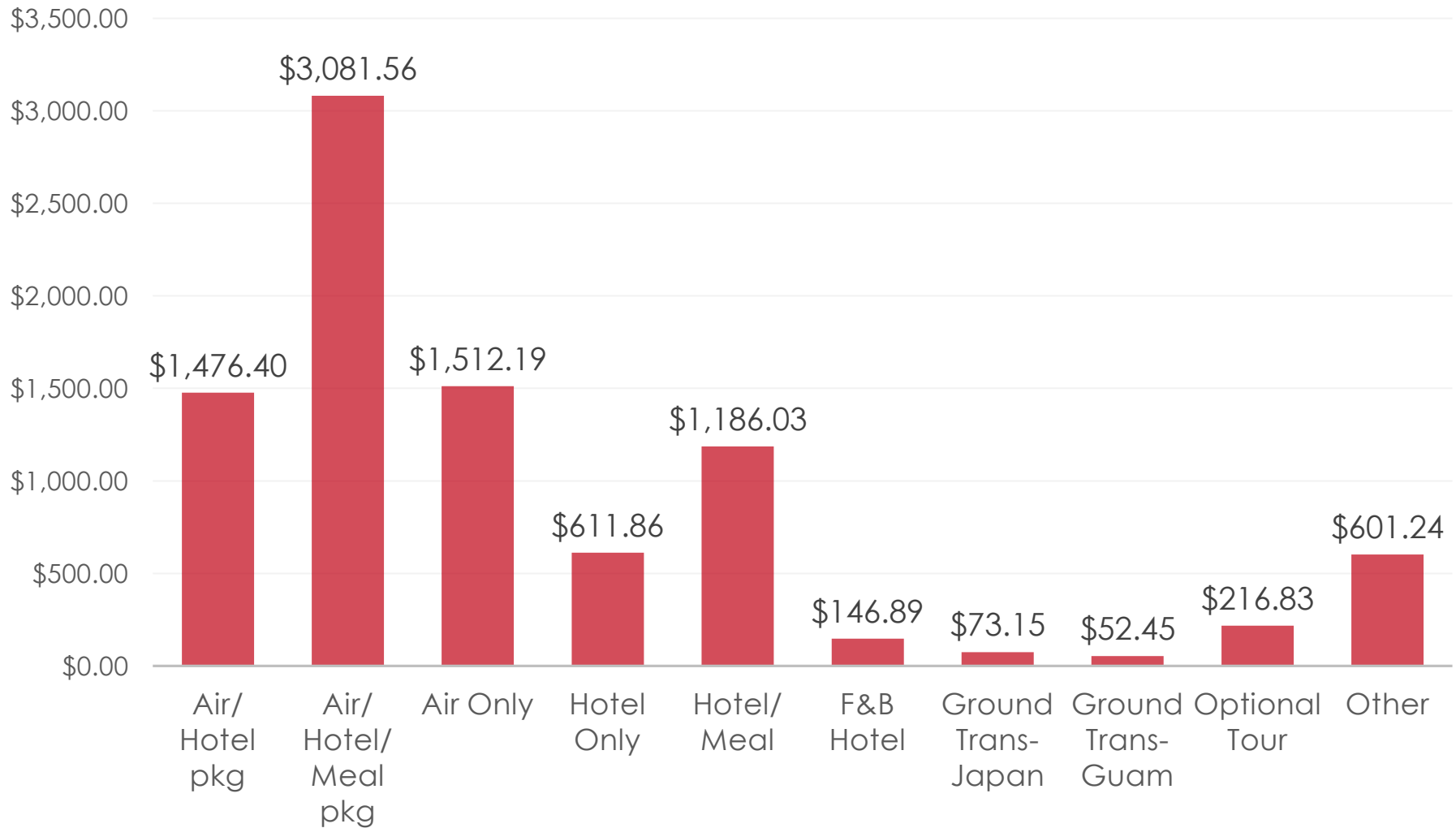
Prepaid Per Person– Key Segments

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

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|------------|--------|----------|----------|----------------|-------------|------------|--------|------------|------------|
| | | - | - | - | - | - | - | - | - |
| PREPAID PP | Mean | \$798.80 | \$928.32 | \$770.87 | \$826.38 | \$1,022.95 | \$0.00 | \$1,141.55 | \$716.46 |
| | Median | \$667 | \$771 | \$623 | \$771 | \$756 | \$0 | \$1,334 | \$578 |

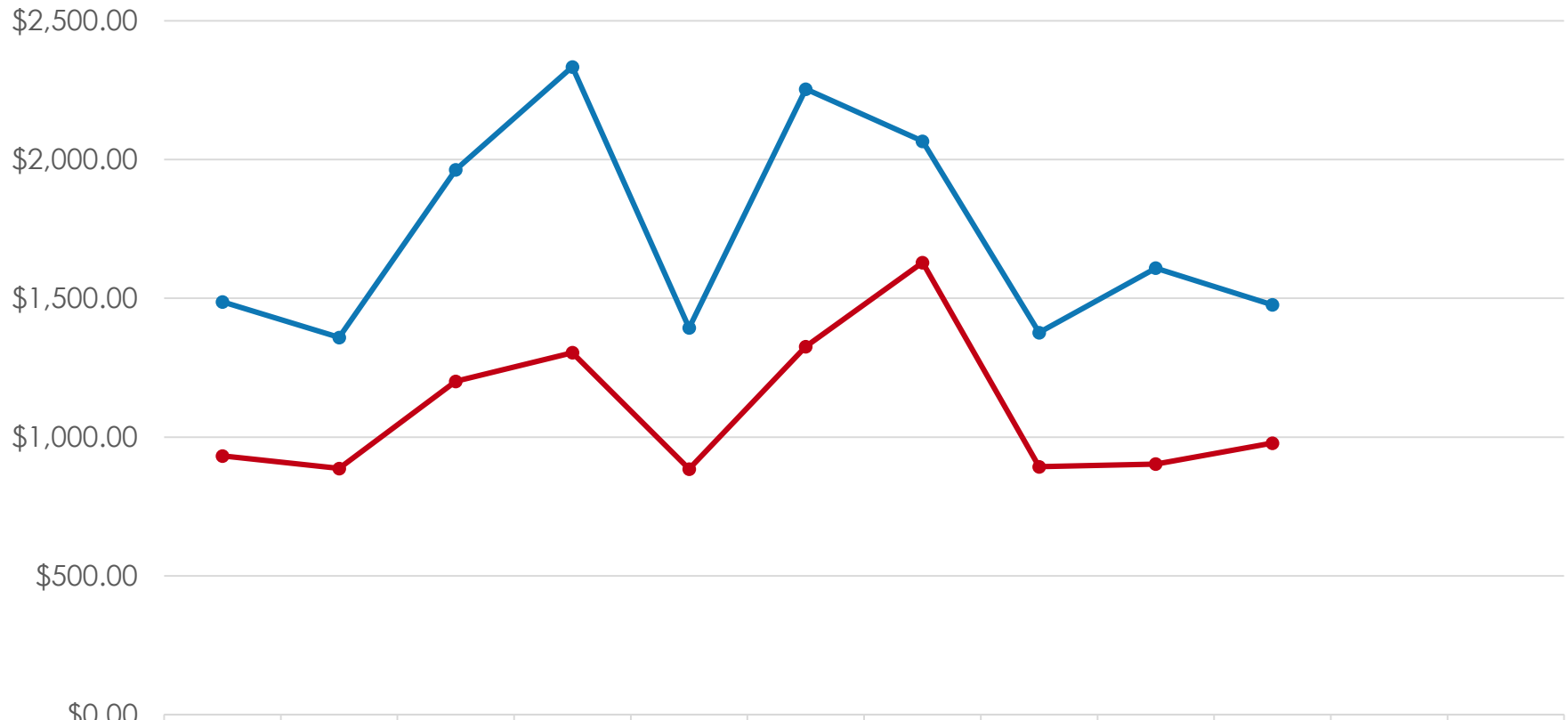
Prepared by Anthology Research

Prepaid Expenses by Category – Mean Entire Travel Party



Prepaid- FY2017 Tracking

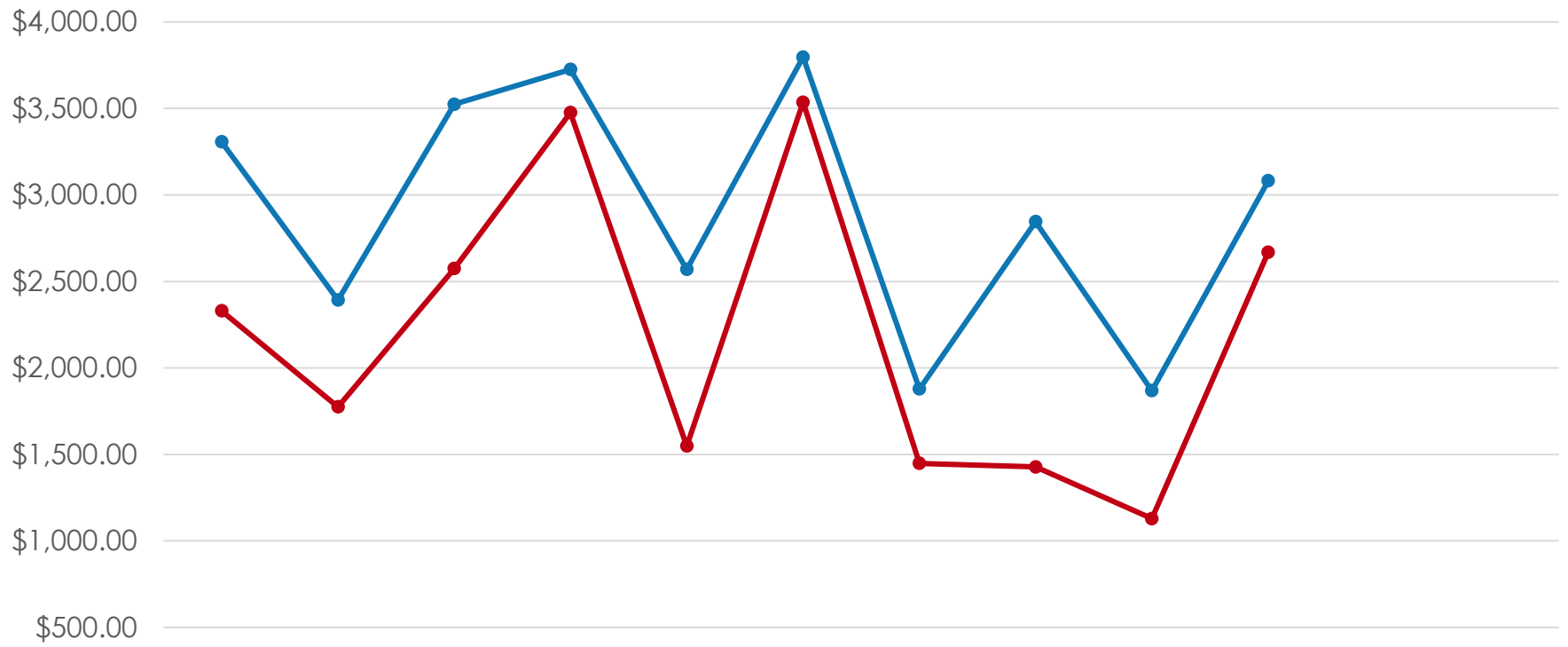
Airfare & Accommodation Packages



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 |
|--------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| MEAN | \$1,487.33 | \$1,358.94 | \$1,963.53 | \$2,333.78 | \$1,393.03 | \$2,253.42 | \$2,065.98 | \$1,376.14 | \$1,608.82 | \$1,476.40 |
| MEDIAN | \$932.00 | \$887.00 | \$1,201.00 | \$1,304.00 | \$885.00 | \$1,326.00 | \$1,629.00 | \$893.00 | \$903.00 | \$978.00 |

Prepaid– FY2017 Tracking

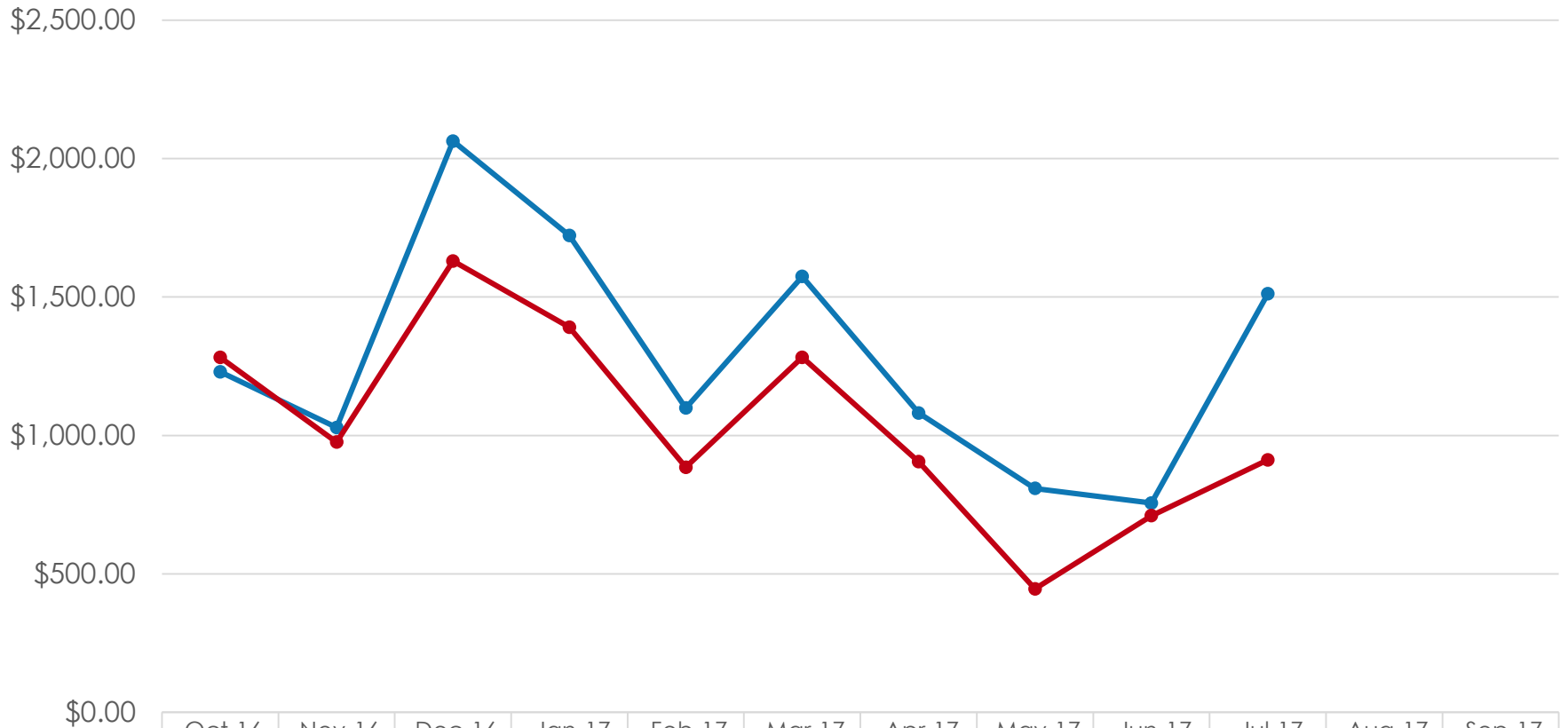
Airfare & Accommodation W/ Meal Packages



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------|--------|
| MEAN | \$3,306.88 | \$2,391.87 | \$3,524.35 | \$3,725.09 | \$2,569.10 | \$3,796.92 | \$1,877.93 | \$2,845.41 | \$1,868.77 | \$3,081.56 | | |
| MEDIAN | \$2,330.00 | \$1,775.00 | \$2,574.00 | \$3,476.00 | \$1,548.00 | \$3,536.00 | \$1,448.00 | \$1,428.00 | \$1,129.00 | \$2,669.00 | | |

Prepaid- FY2017 Tracking

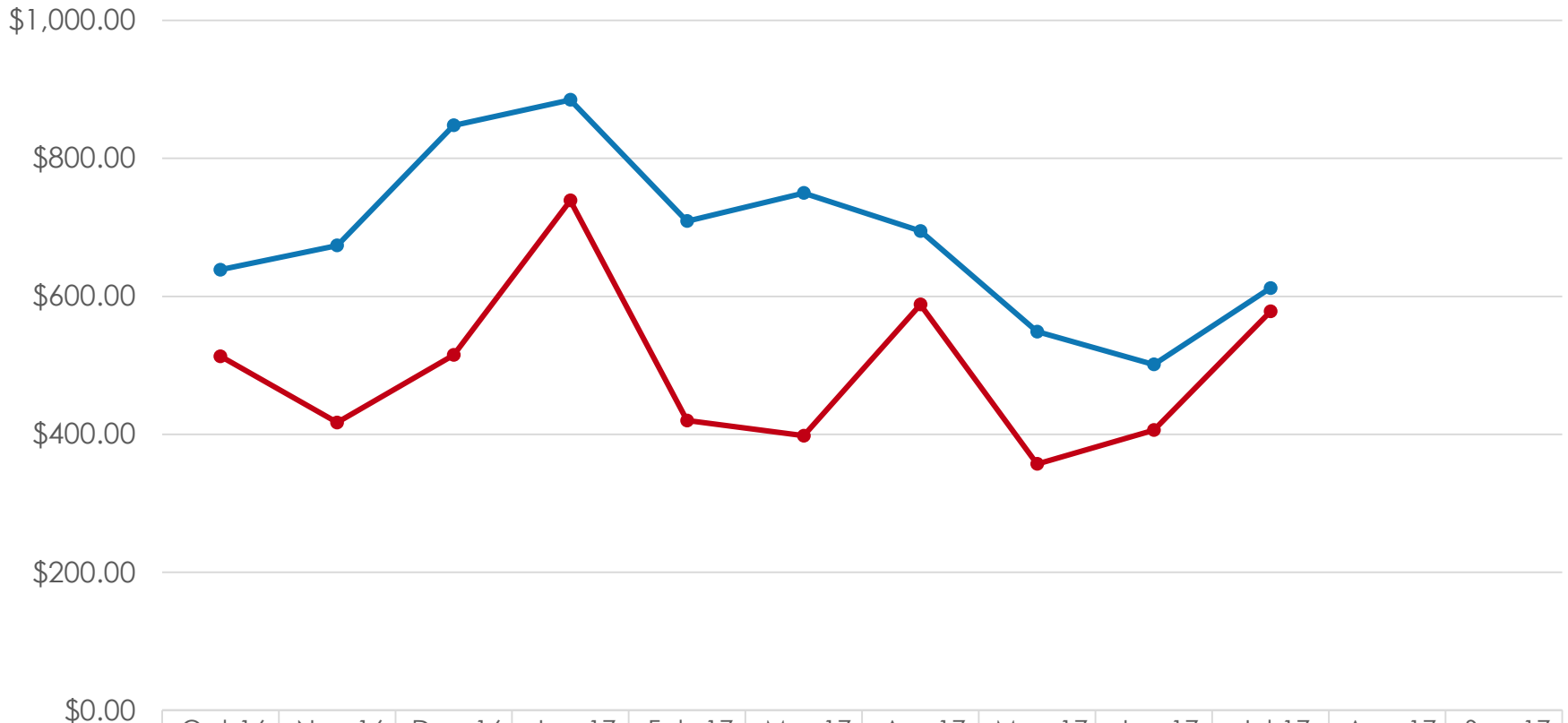
Airfare Only



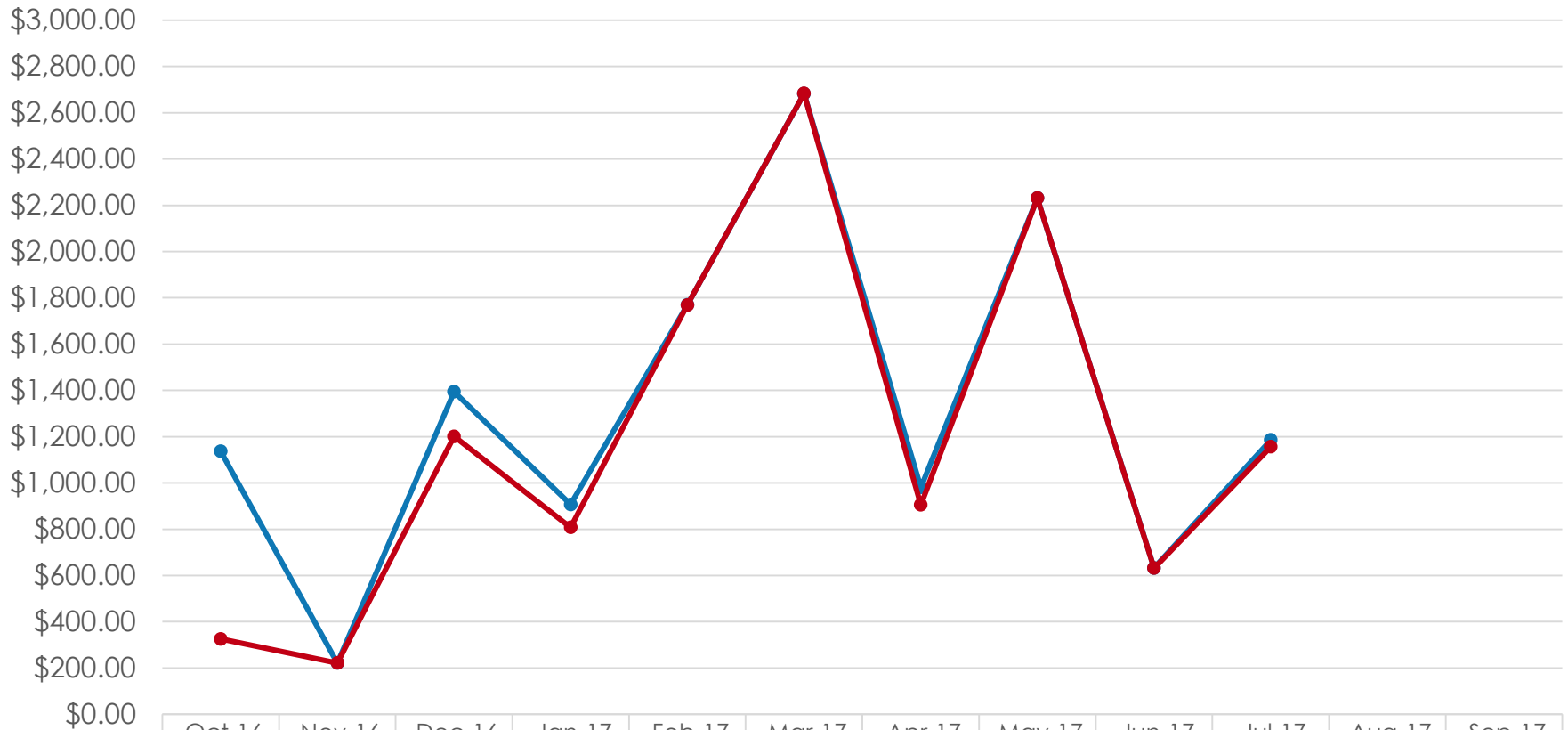
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|------------|------------|------------|------------|------------|------------|------------|----------|----------|------------|--------|--------|
| MEAN | \$1,229.97 | \$1,028.87 | \$2,063.14 | \$1,722.42 | \$1,099.10 | \$1,574.02 | \$1,081.00 | \$808.87 | \$755.97 | \$1,512.19 | | |
| MEDIAN | \$1,282.00 | \$976.00 | \$1,630.00 | \$1,391.00 | \$885.00 | \$1,282.00 | \$905.00 | \$446.00 | \$710.00 | \$912.00 | | |

Prepaid- FY2017 Tracking

Accommodations Only



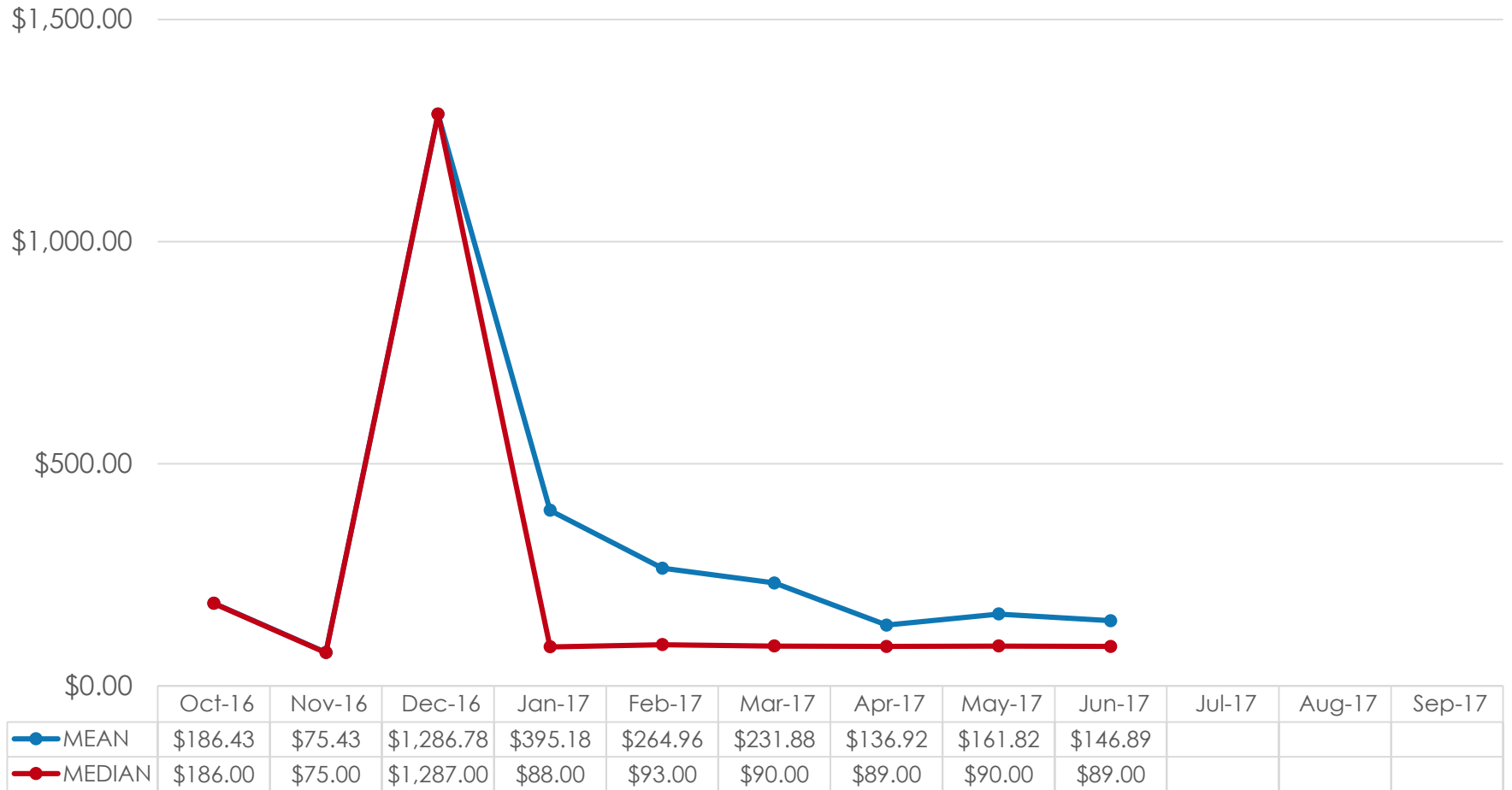
Prepaid- FY2017 Tracking Accommodations w/ Meal Only



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|------------|----------|------------|----------|------------|------------|----------|------------|----------|------------|--------|--------|
| MEAN | \$1,137.21 | \$221.87 | \$1,394.01 | \$906.77 | \$1,769.44 | \$2,682.75 | \$980.30 | \$2,231.35 | \$632.11 | \$1,186.03 | | |
| MEDIAN | \$326.00 | \$222.00 | \$1,201.00 | \$808.00 | \$1,769.00 | \$2,683.00 | \$905.00 | \$2,231.00 | \$632.00 | \$1,156.00 | | |

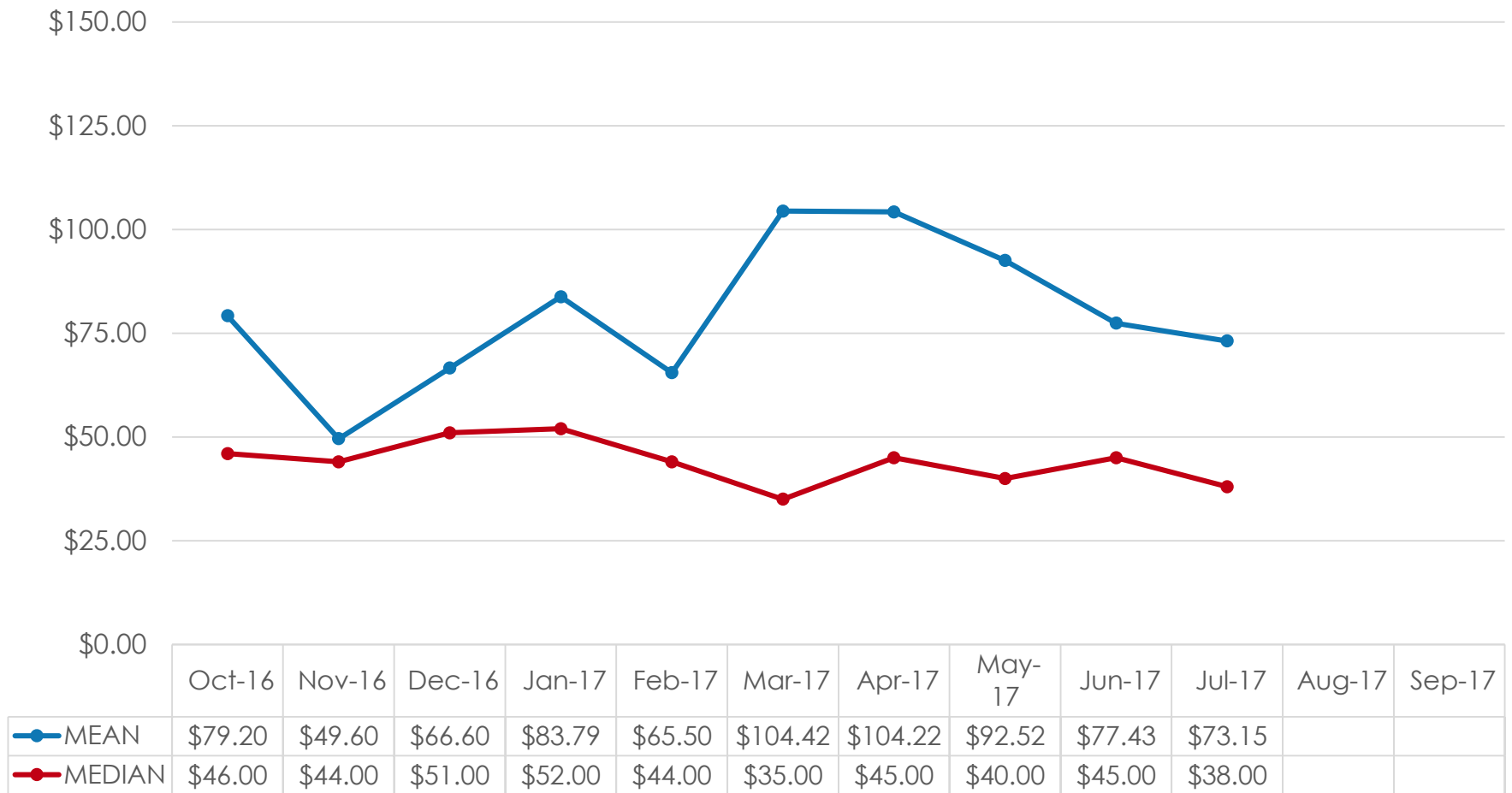
Prepaid- FY2017 Tracking

Food & Beverage in Hotel



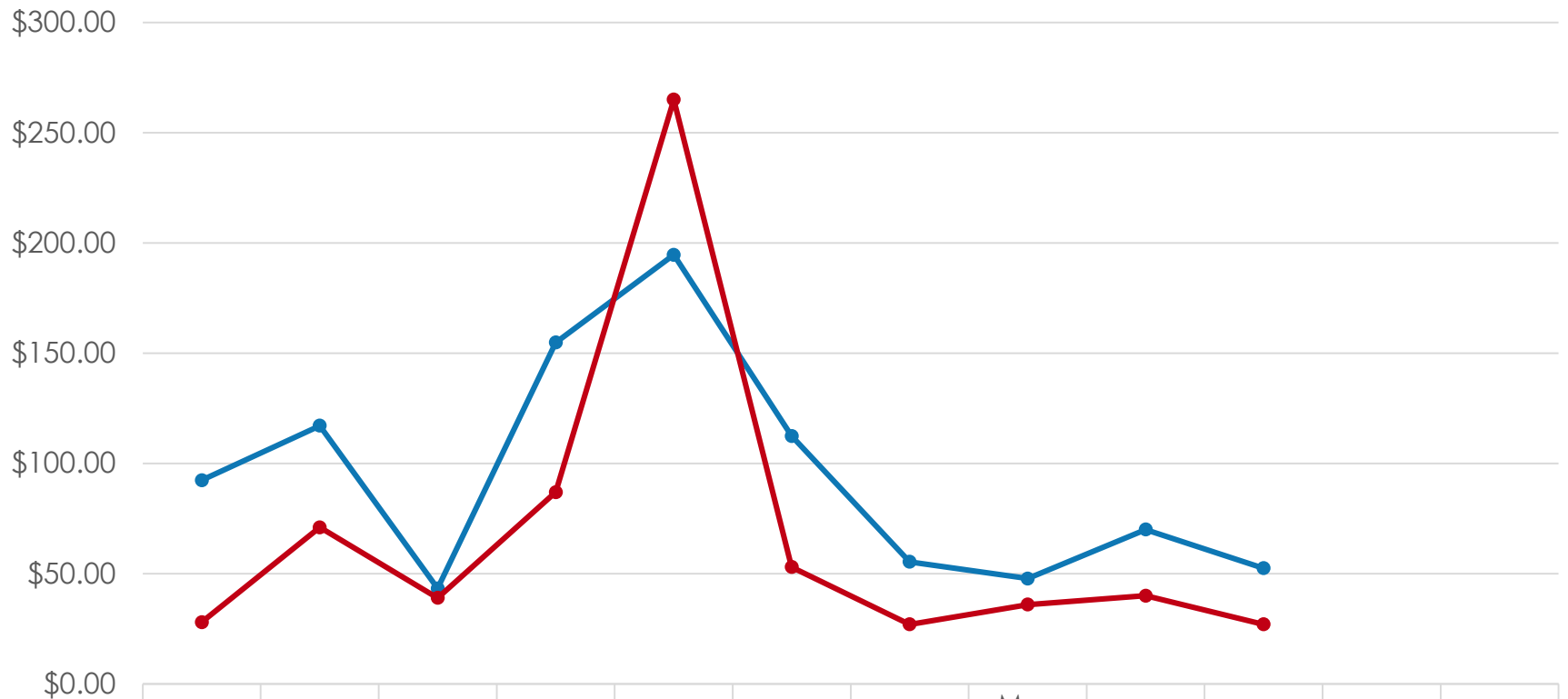
Prepaid- FY2017 Tracking

Ground Transportation - Japan



Prepaid- FY2017 Tracking

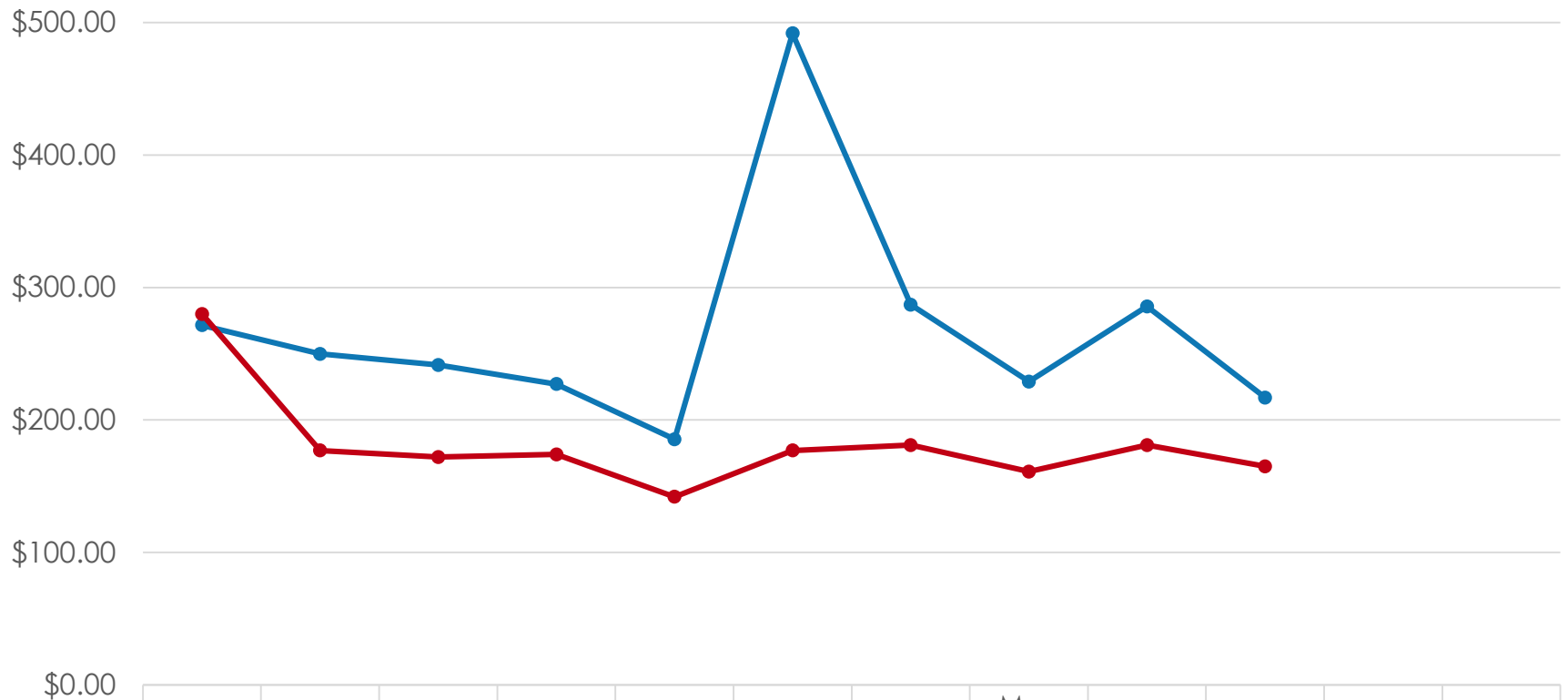
Ground Transportation - Guam



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|---------|----------|---------|----------|----------|----------|---------|---------|---------|---------|--------|--------|
| MEAN | \$92.37 | \$117.15 | \$43.32 | \$154.86 | \$194.64 | \$112.44 | \$55.35 | \$47.77 | \$70.04 | \$52.45 | | |
| MEDIAN | \$28.00 | \$71.00 | \$39.00 | \$87.00 | \$265.00 | \$53.00 | \$27.00 | \$36.00 | \$40.00 | \$27.00 | | |

Prepaid- FY2017 Tracking

Optional tours/ Activities



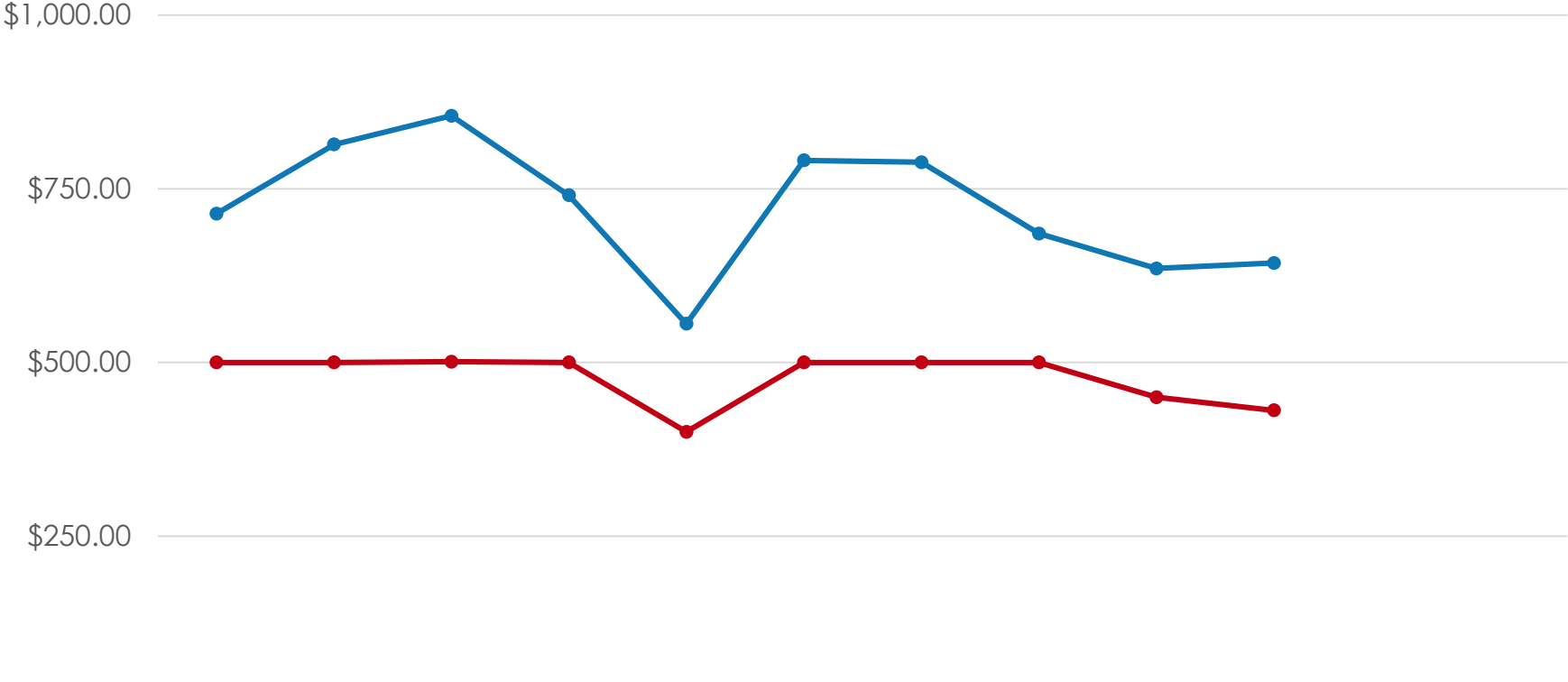
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|--------|
| MEAN | \$271.44 | \$249.81 | \$241.44 | \$227.10 | \$185.40 | \$491.76 | \$286.97 | \$228.94 | \$285.72 | \$216.83 | | |
| MEDIAN | \$280.00 | \$177.00 | \$172.00 | \$174.00 | \$142.00 | \$177.00 | \$181.00 | \$161.00 | \$181.00 | \$165.00 | | |

On-Island Expenditures

- \$643.11 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$400.11 = overall mean average per person prepaid expenditures

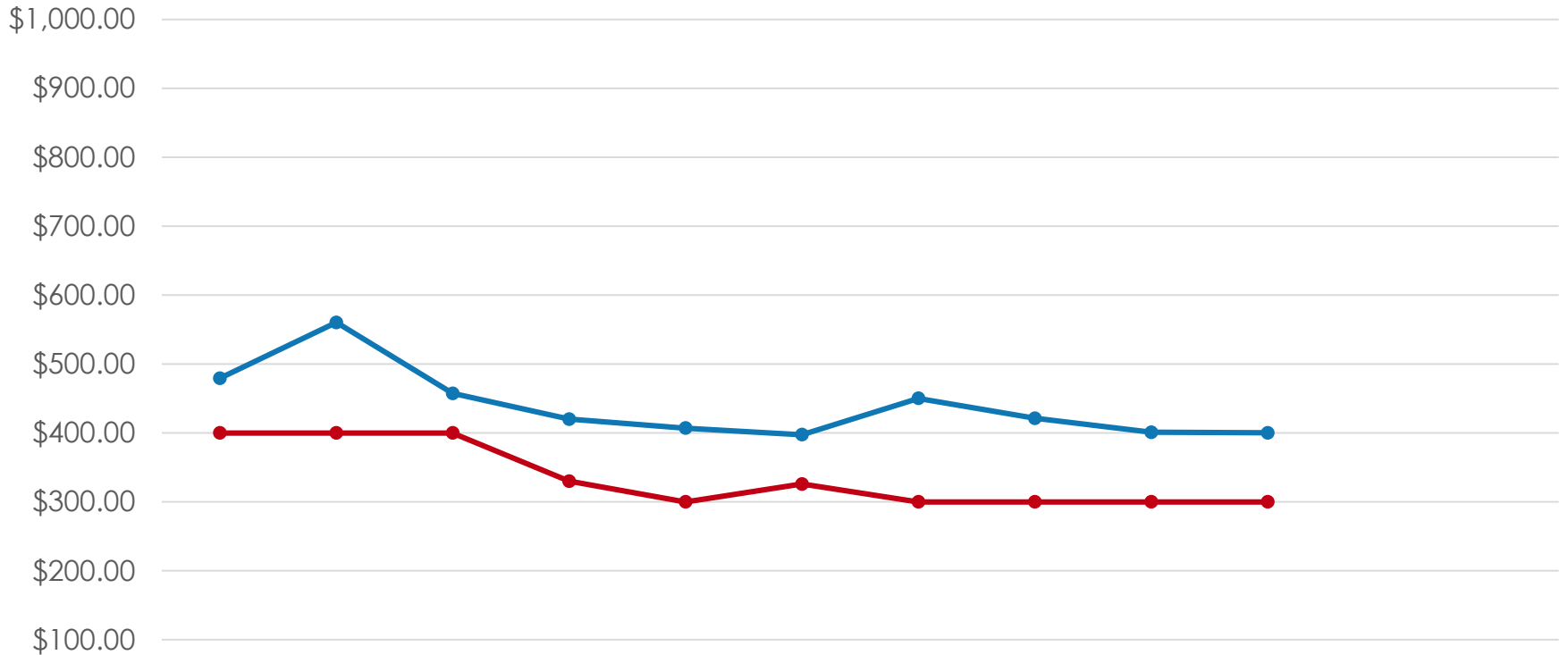
On-Island Entire Travel Party – FY2017

Tracking



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|--------|--------|
| MEAN | \$714.19 | \$813.75 | \$854.97 | \$740.47 | \$555.55 | \$790.76 | \$788.10 | \$685.53 | \$635.33 | \$643.11 | | |
| MEDIAN | \$500.00 | \$500.00 | \$501.00 | \$500.00 | \$400.00 | \$500.00 | \$500.00 | \$500.00 | \$450.00 | \$431.00 | | |

On-Island Per Person – FY2017 Tracking



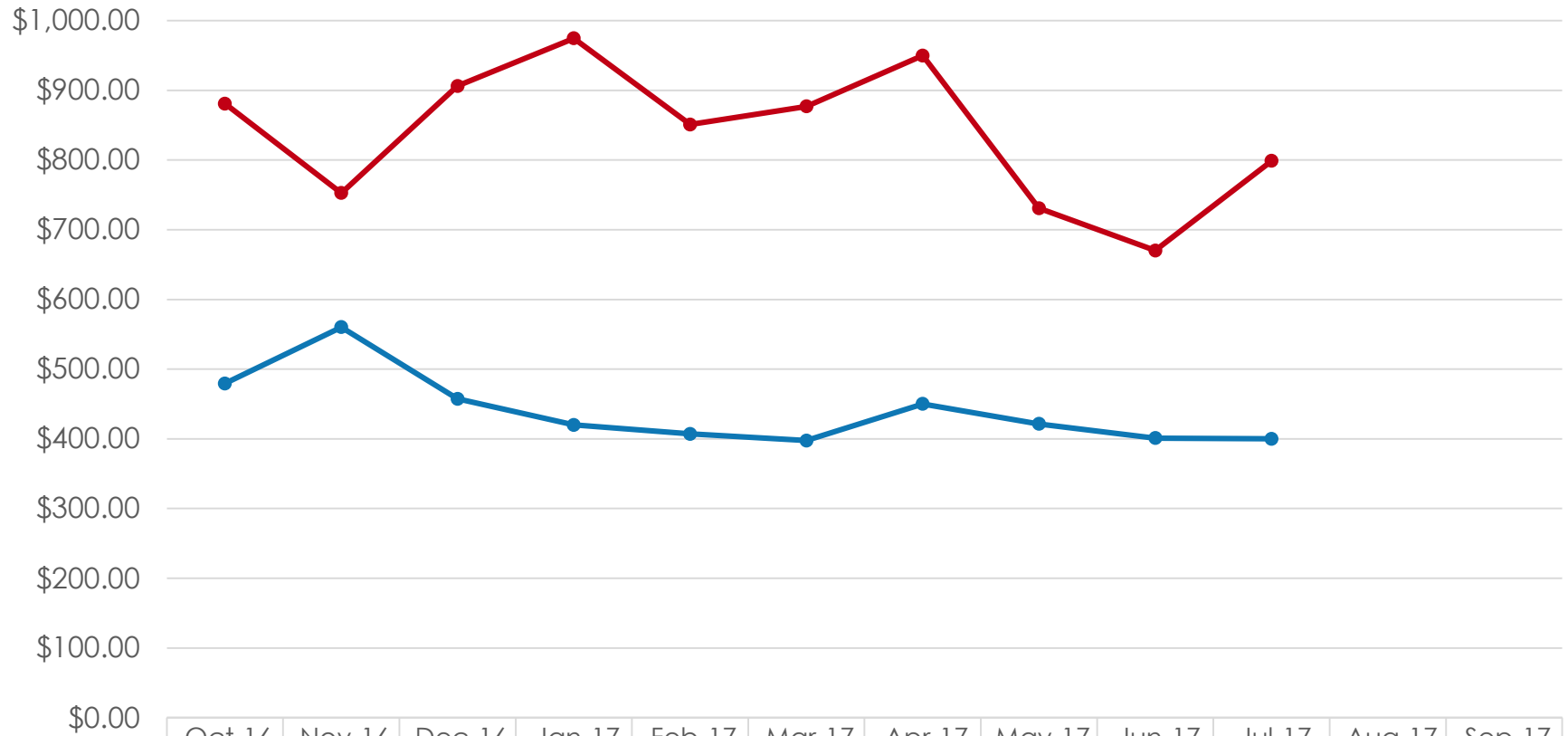
On-Island Per Person – Key Segments

GVB EXIT SURVEY
Q11A ONISLE EXPENDITURE- PER PERSO

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|-------------------|--------|----------|----------|----------------|-------------|----------|----------|----------|------------|
| | | - | - | - | - | - | - | - | - |
| ONISLE PER PERSON | Mean | \$400.11 | \$363.26 | \$457.84 | \$392.07 | \$766.67 | \$275.00 | \$327.19 | \$365.56 |
| | Median | \$300 | \$250 | \$300 | \$300 | \$500 | \$275 | \$250 | \$250 |

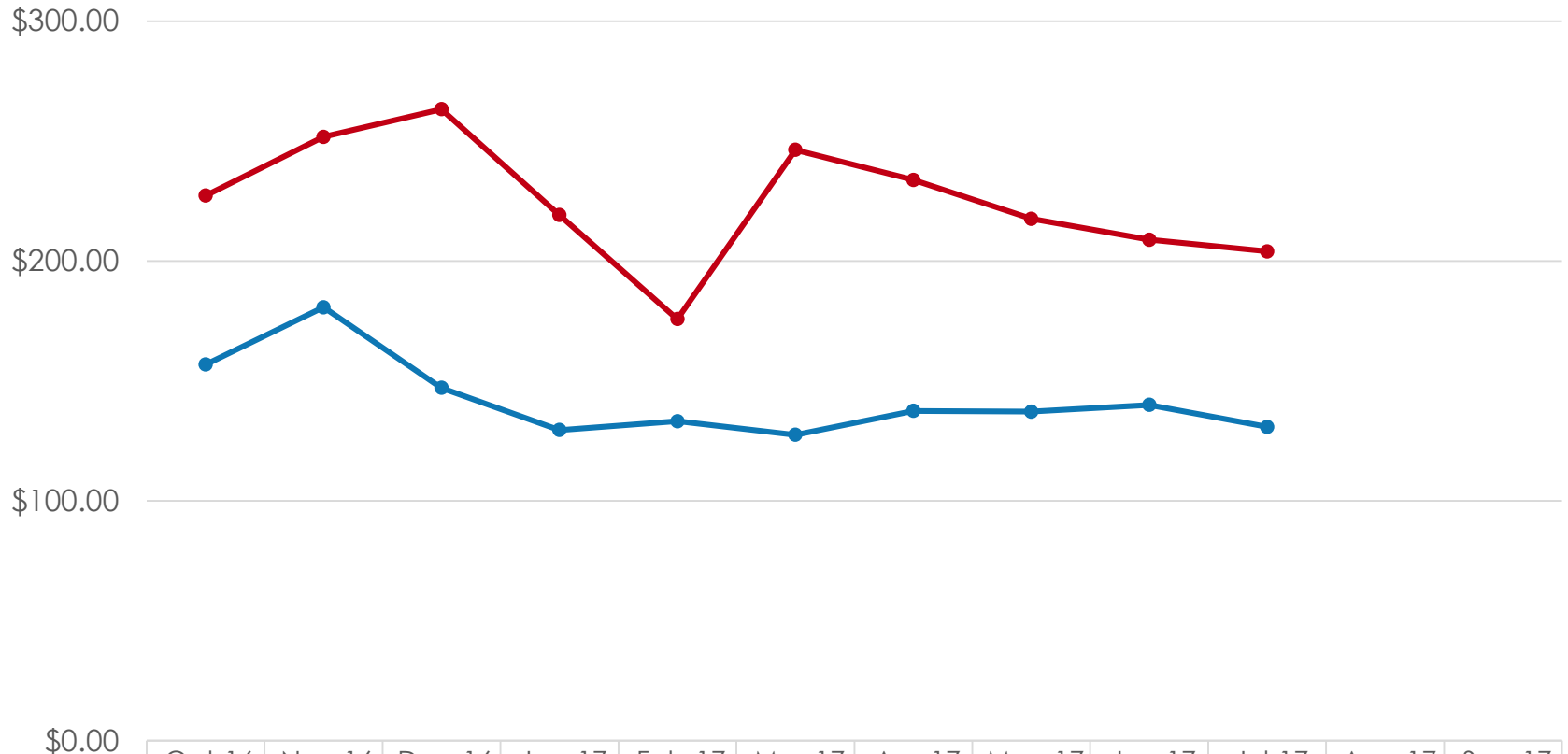
Prepared by Anthology Research

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



On-Island Per Day Spending – FY2017 Tracking

MEAN

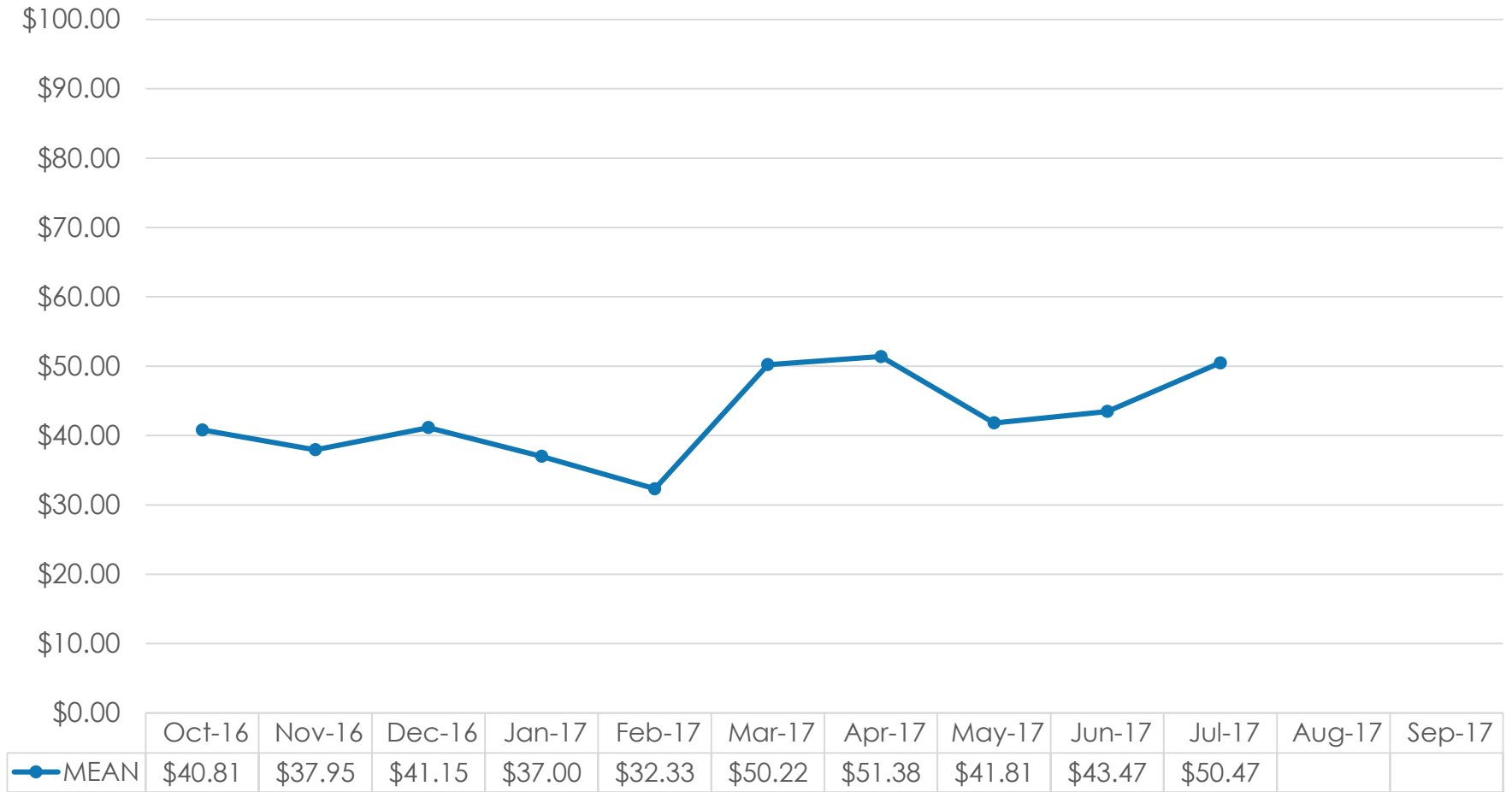


On-Island Expenses by Category – Mean Entire Travel Party



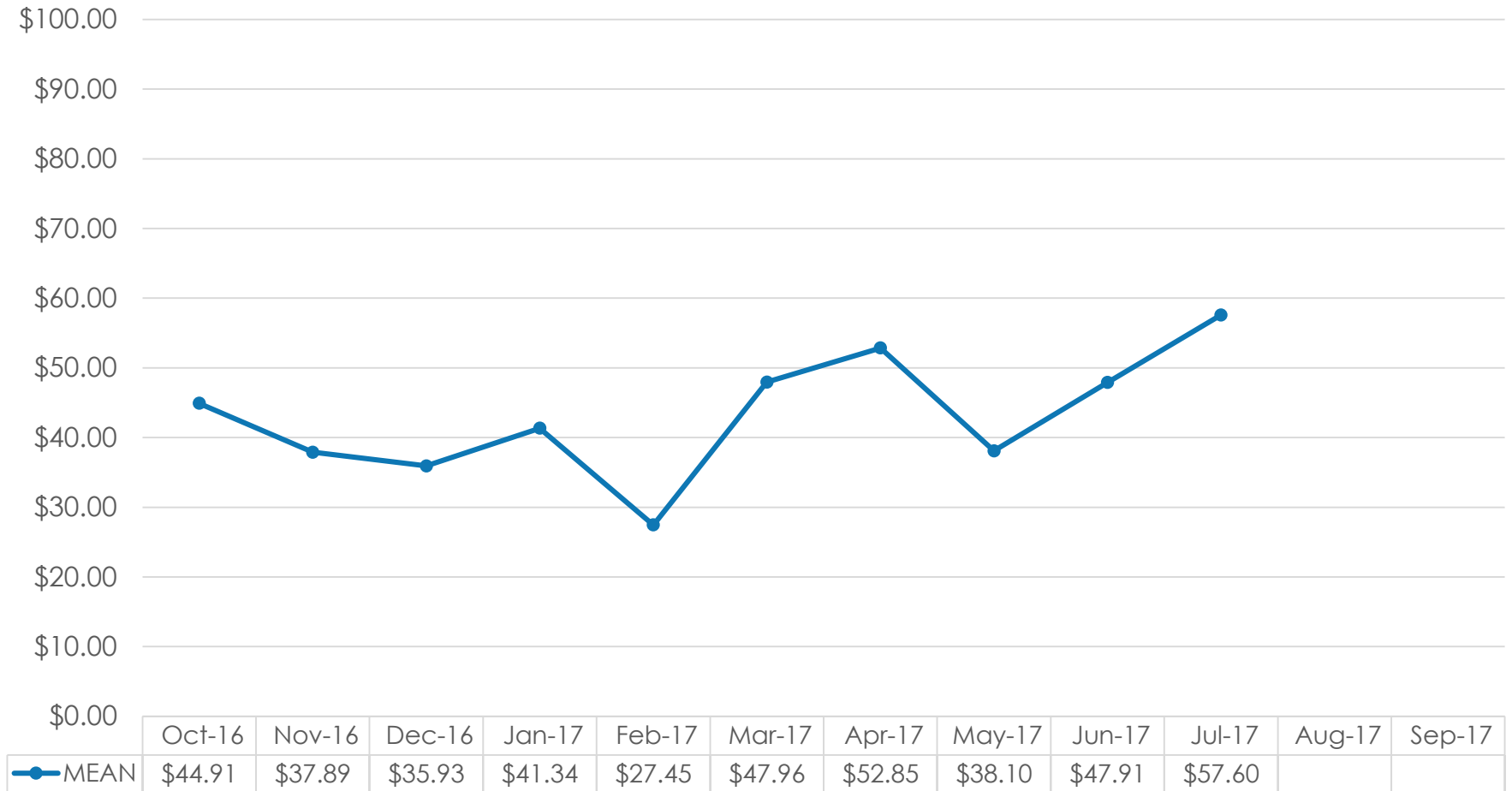
On-Island – FY2017 Tracking

Food & Beverage - Hotel



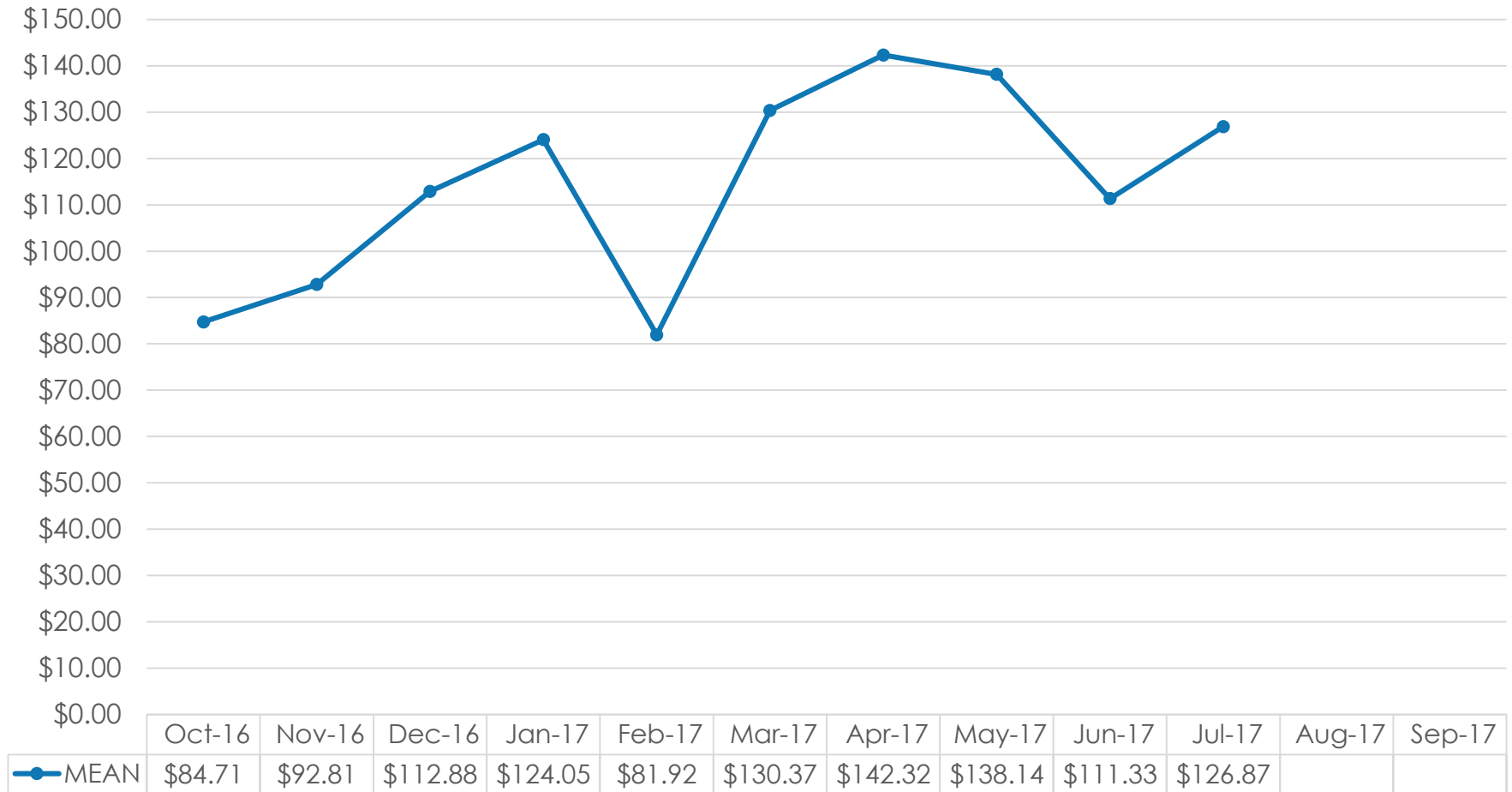
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



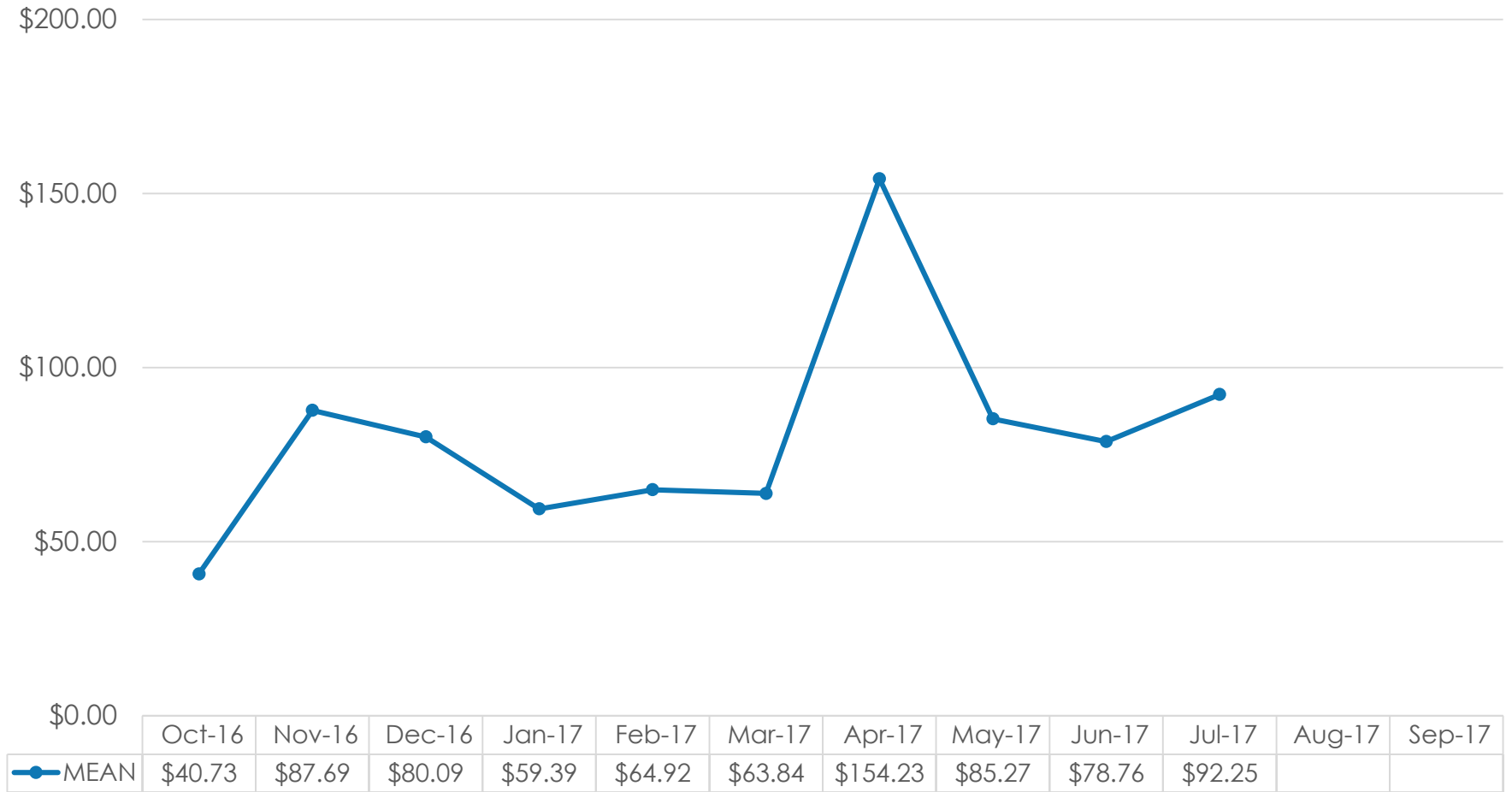
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



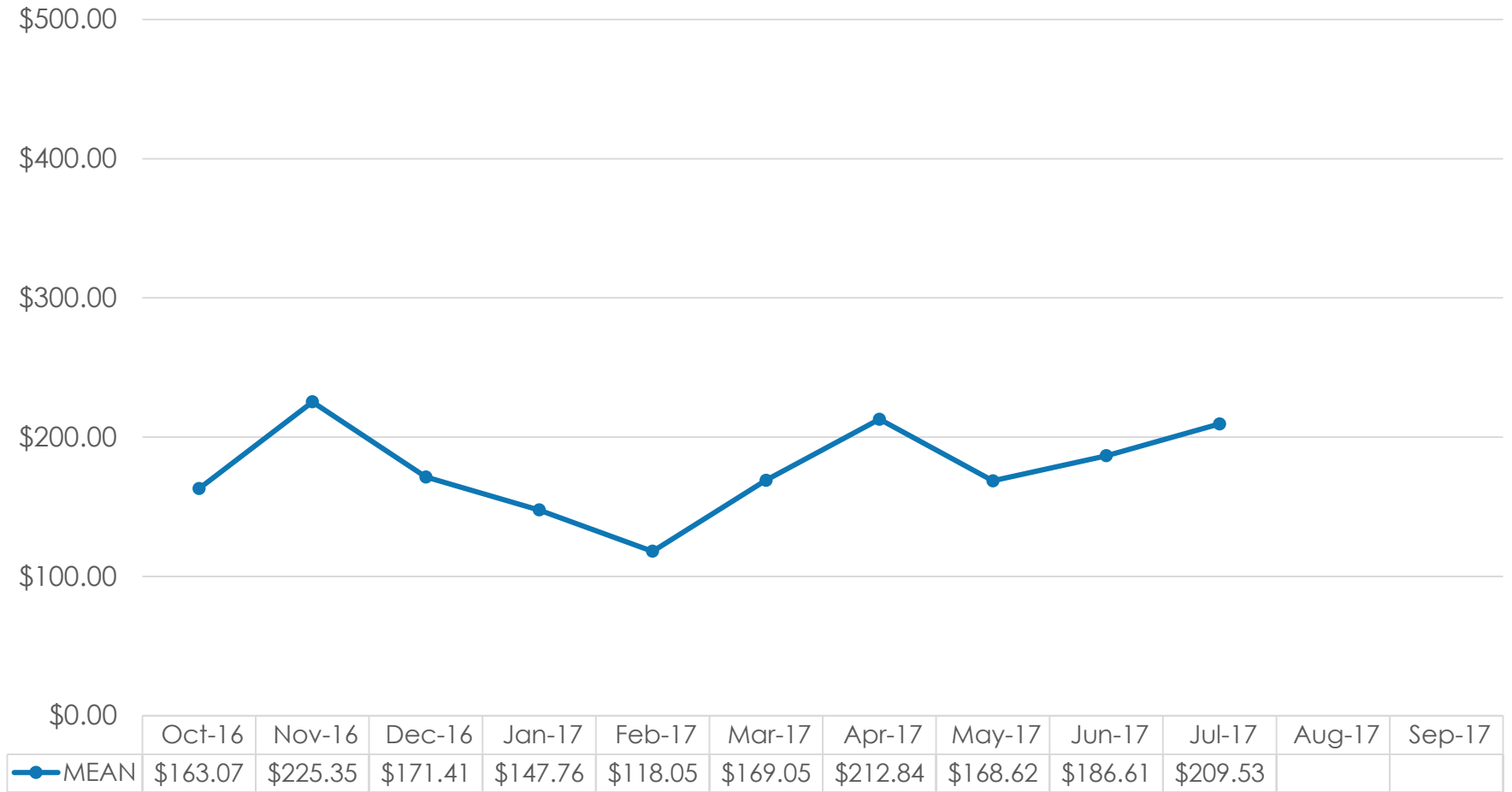
On-Island – FY2017 Tracking

Optional tour/ Activities



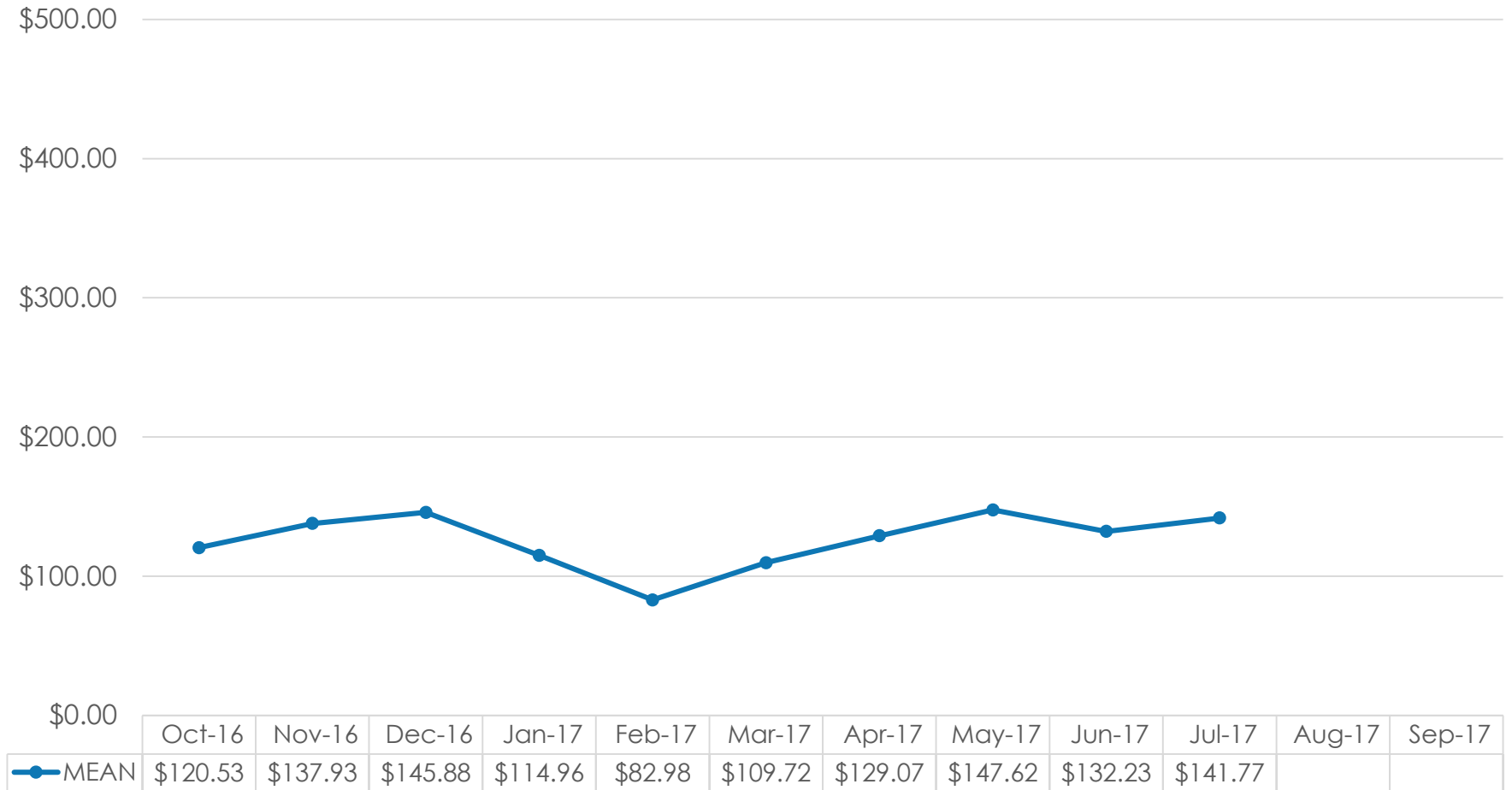
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



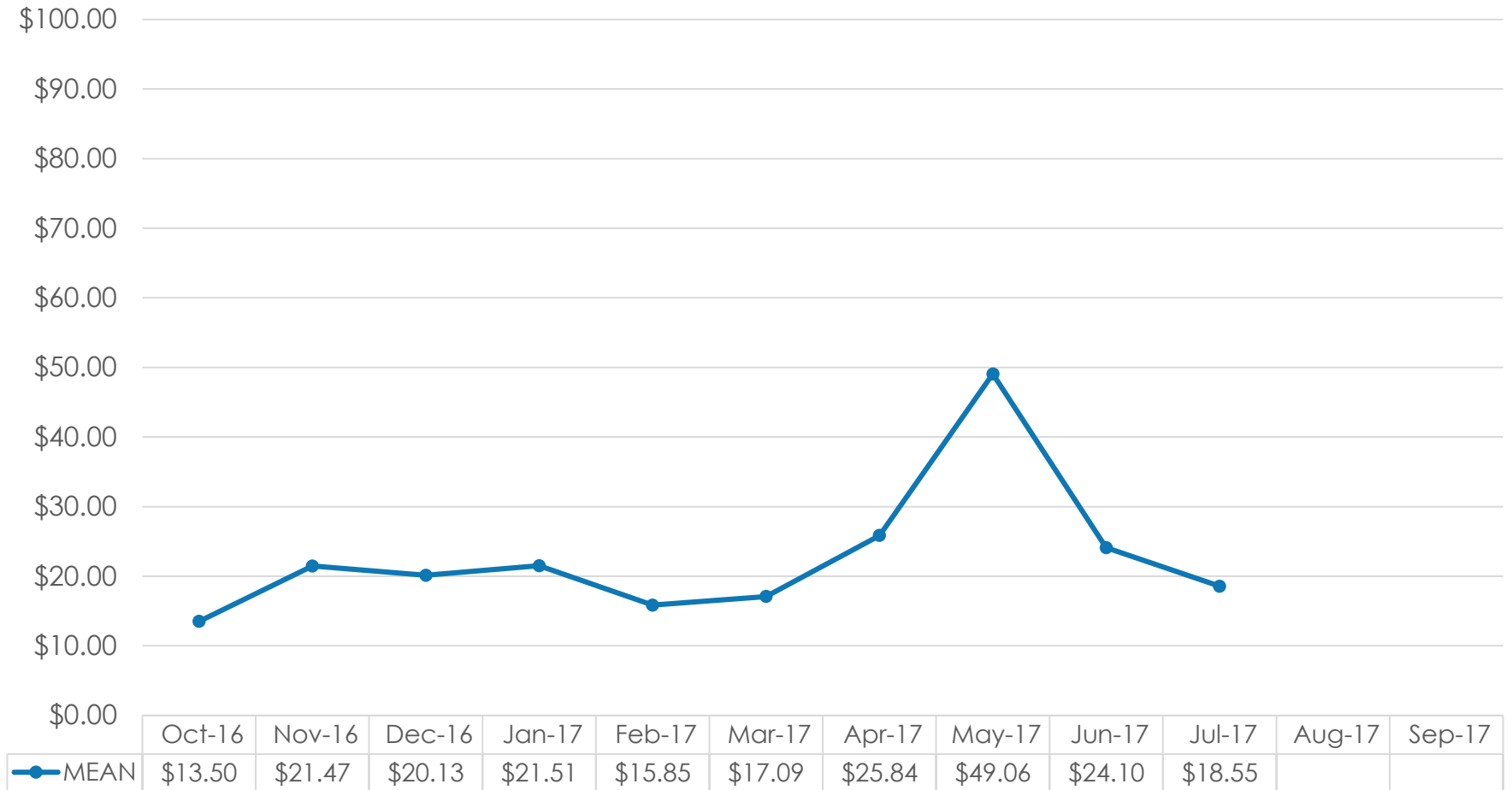
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



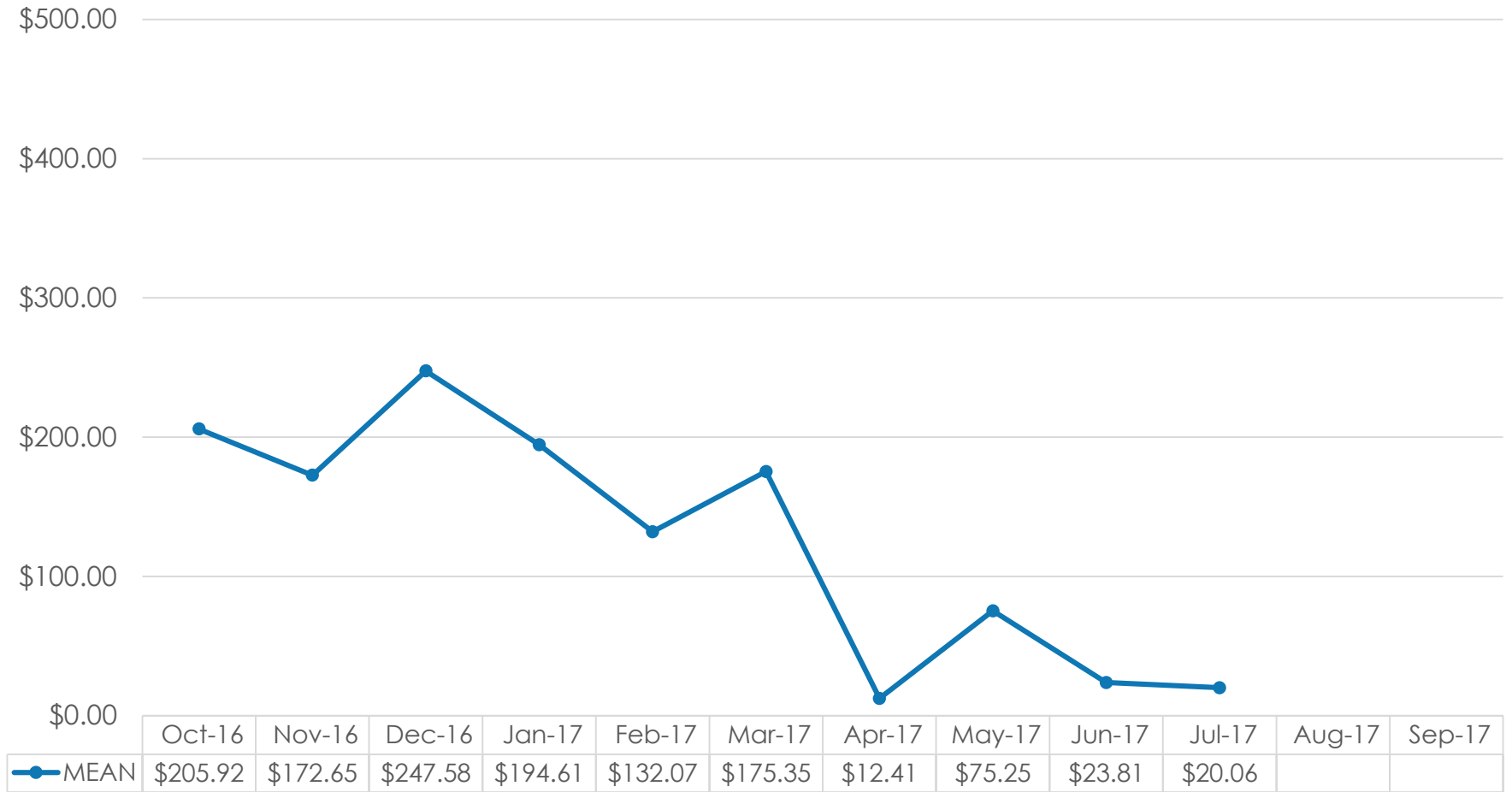
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

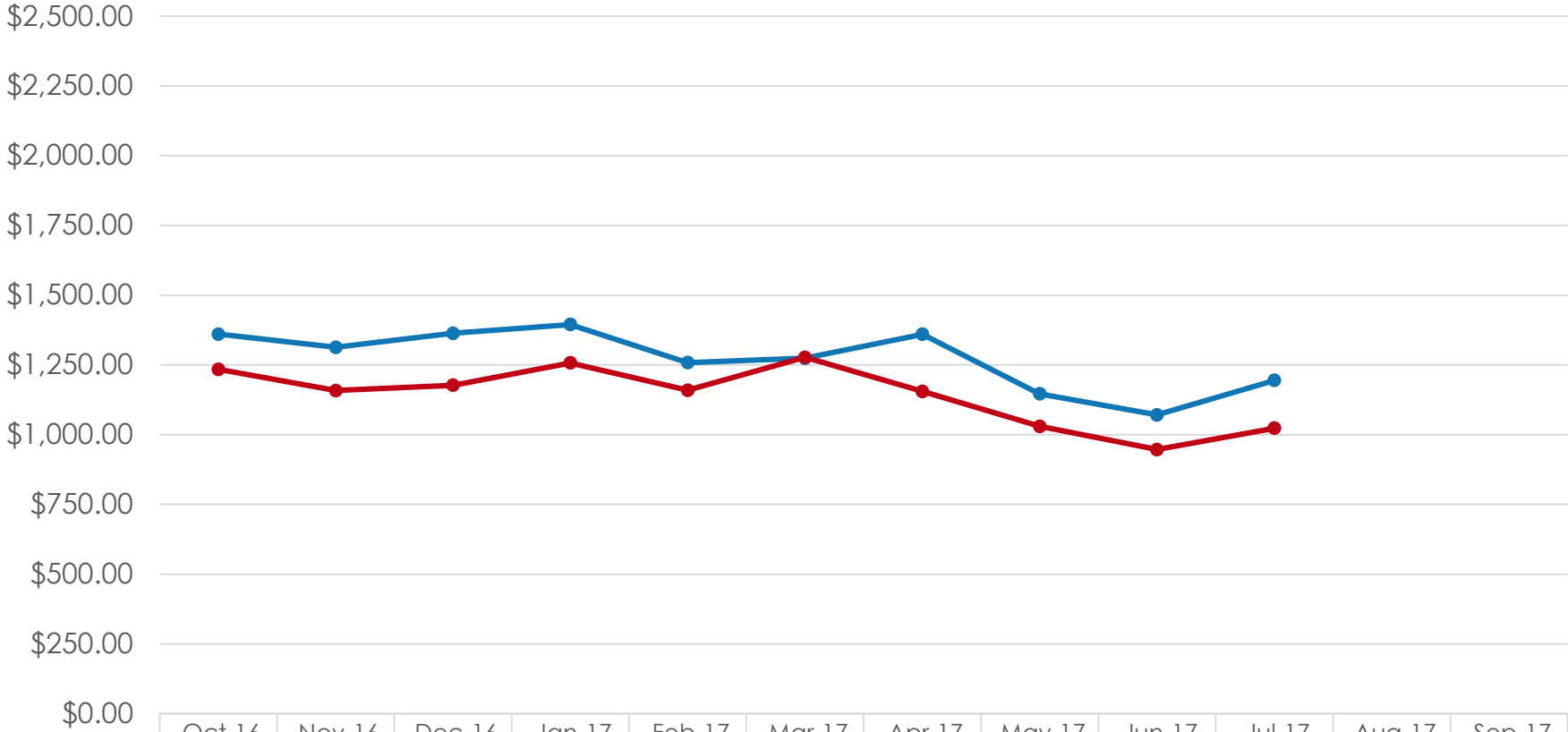
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,194.35 = overall mean average prepaid & on-isle expense by respondent

TOTAL Per Person Expenditures – FY2017 Tracking



| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 |
|--------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------|--------|
| MEAN | \$1,360.31 | \$1,312.92 | \$1,363.21 | \$1,394.62 | \$1,257.93 | \$1,274.23 | \$1,359.97 | \$1,146.41 | \$1,071.15 | \$1,194.35 | | |
| MEDIAN | \$1,234.00 | \$1,158.00 | \$1,177.00 | \$1,257.00 | \$1,159.00 | \$1,277.00 | \$1,155.00 | \$1,030.00 | \$947.00 | \$1,023.00 | | |

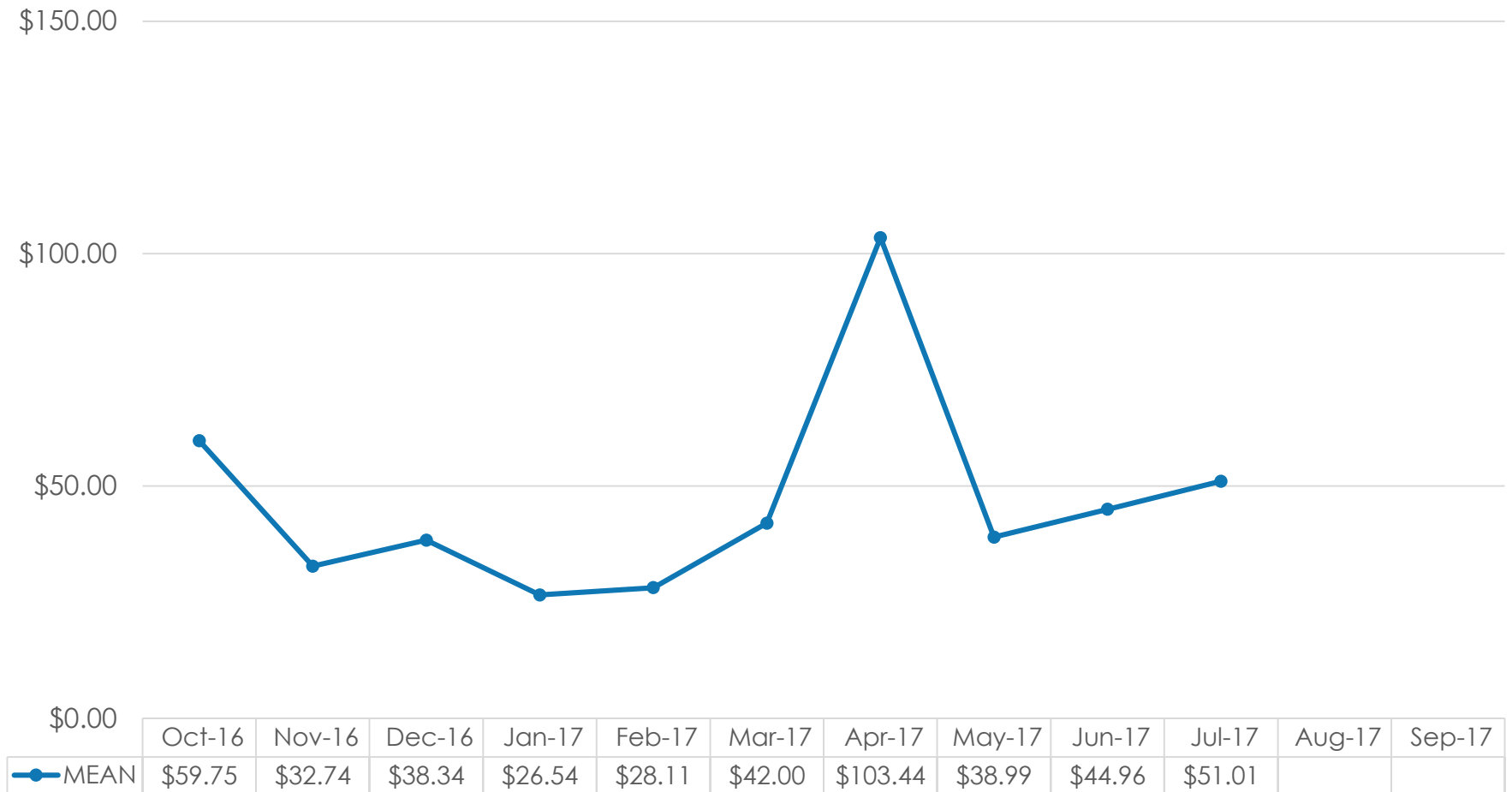
TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY
TOTAL PER PERSON SPENDING**

| | | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|------------------|--------|------------|------------|----------------|-------------|------------|----------|------------|------------|
| | | - | - | - | - | - | - | - | - |
| TOTAL PER PERSON | Mean | \$1,194.35 | \$1,286.06 | \$1,224.40 | \$1,218.44 | \$1,789.62 | \$275.00 | \$1,468.75 | \$1,073.97 |
| | Median | \$1,023 | \$1,110 | \$980 | \$1,090 | \$1,901 | \$275 | \$1,534 | \$893 |

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

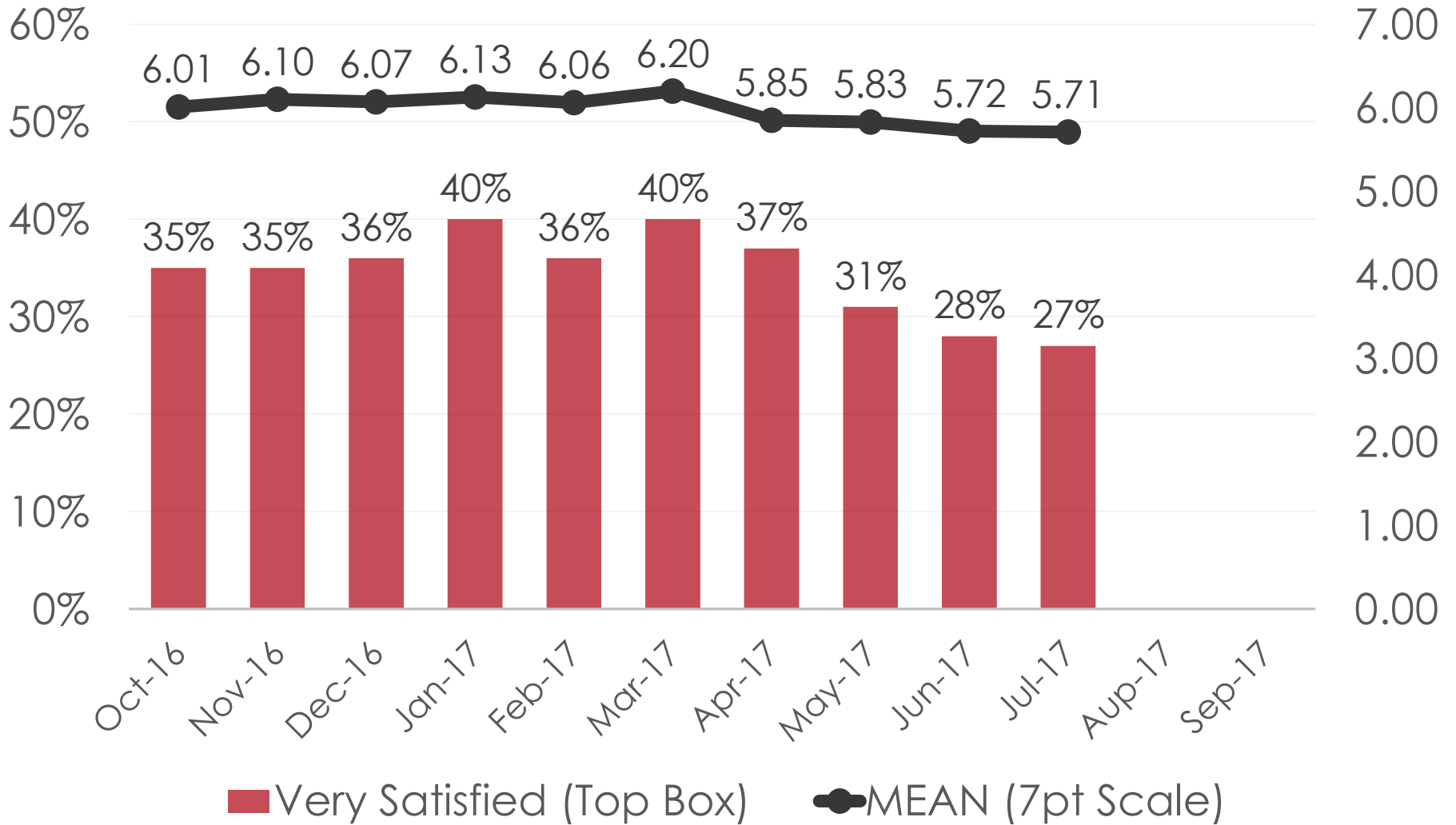


SECTION 4

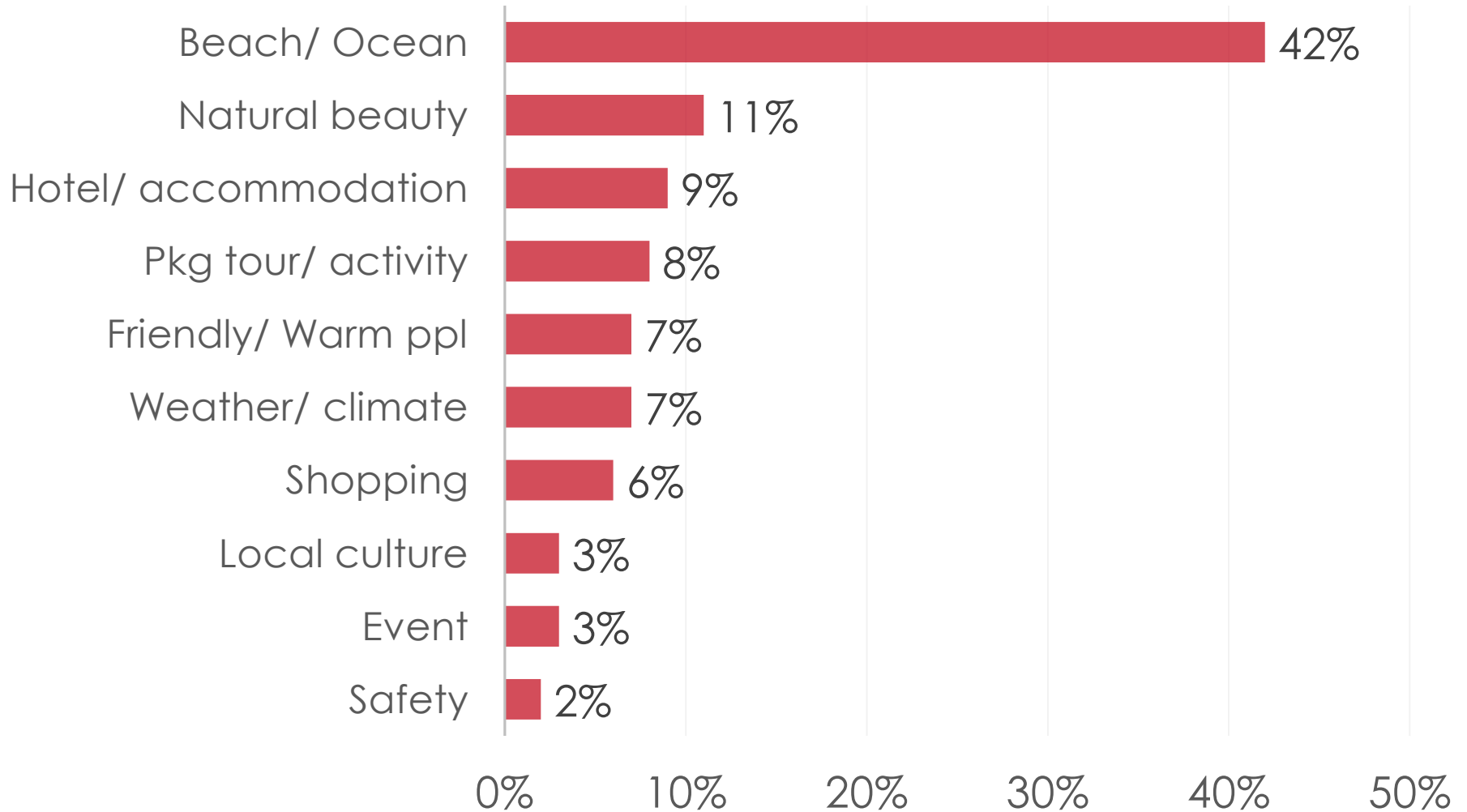
VISITOR SATISFACTION

BEHAVIOR

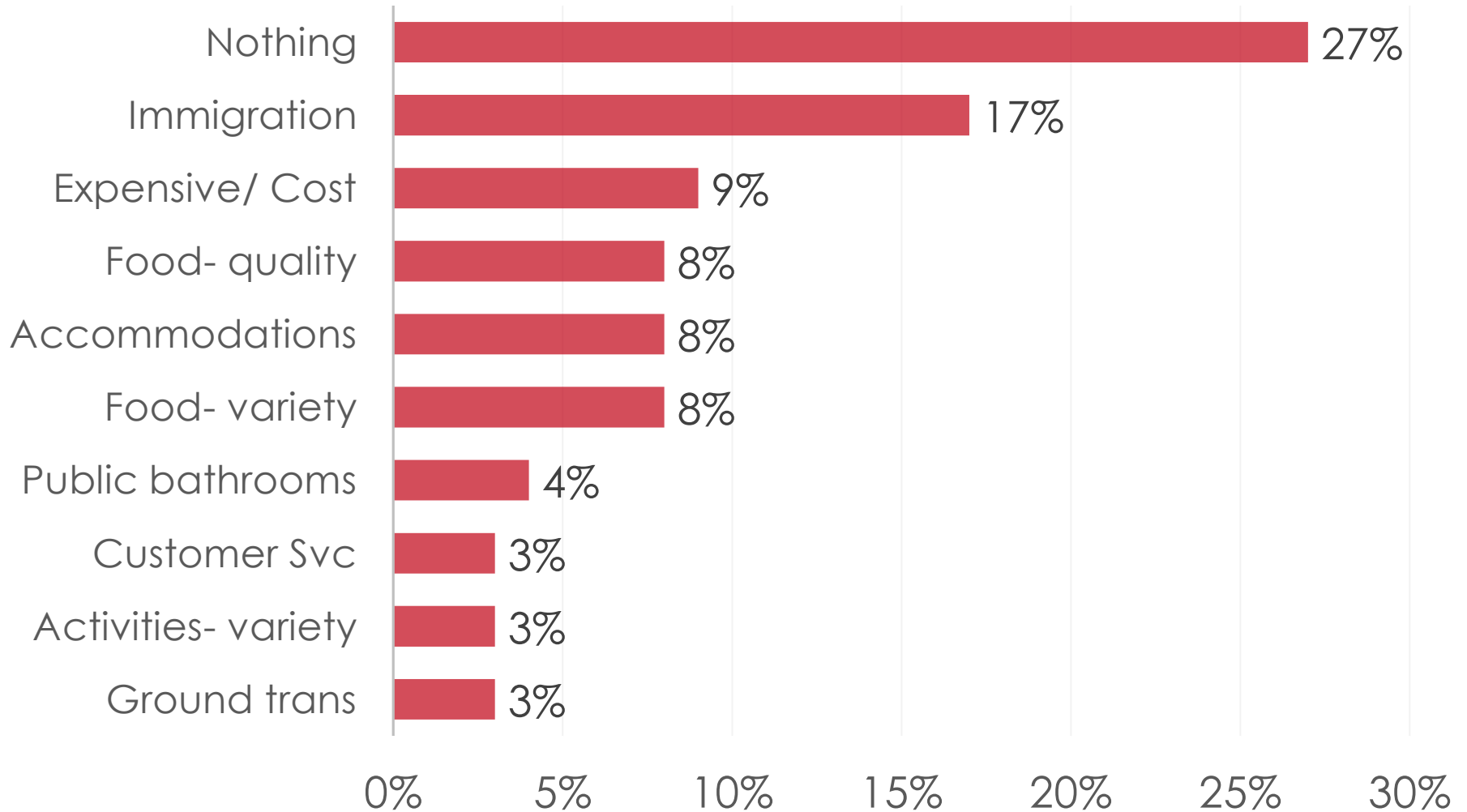
OVERALL SATISFACTION



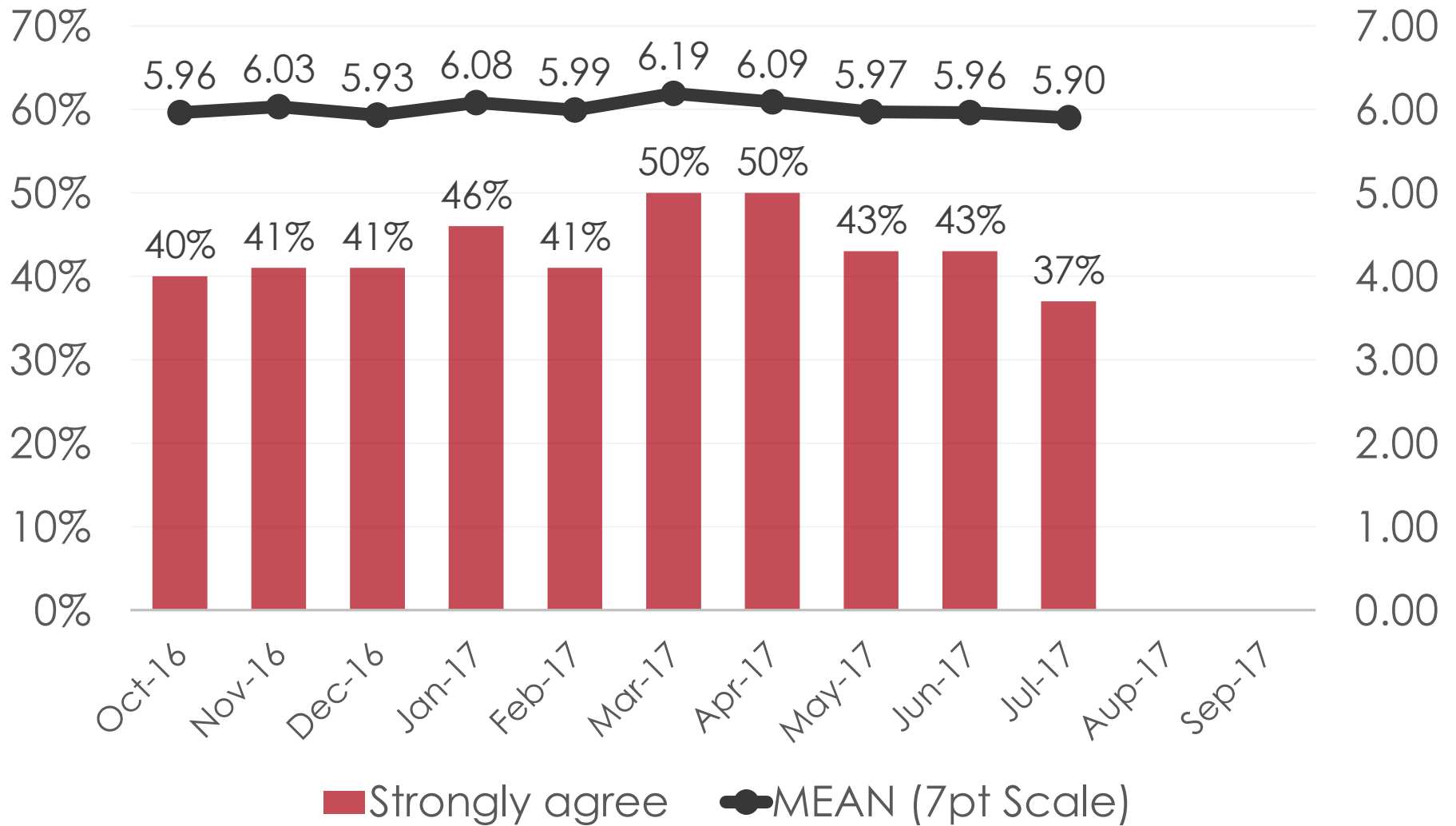
Positive aspects of trip (Top Reason)



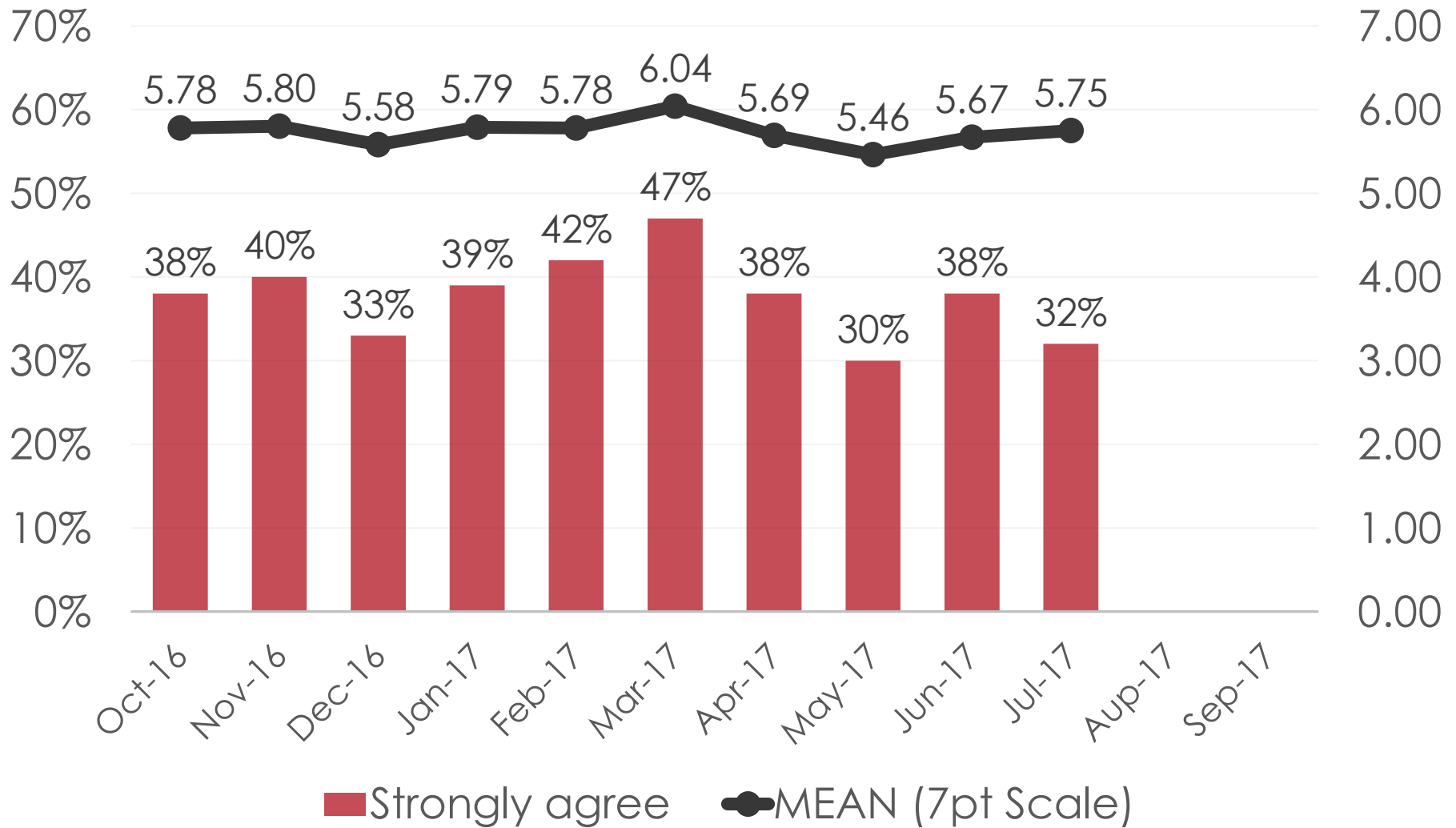
Negative aspects of trip (Top Reason)



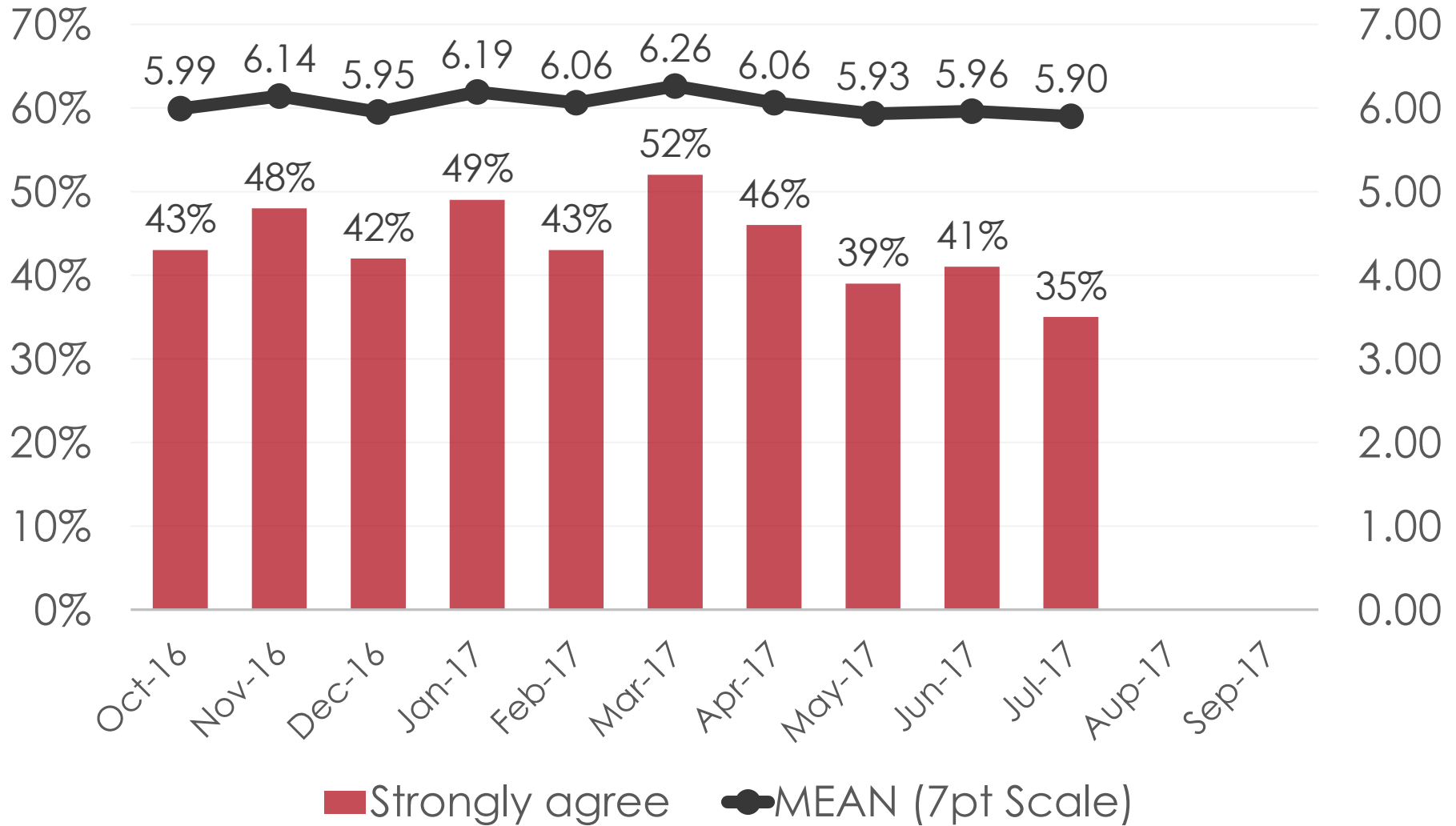
Guam was better than expected



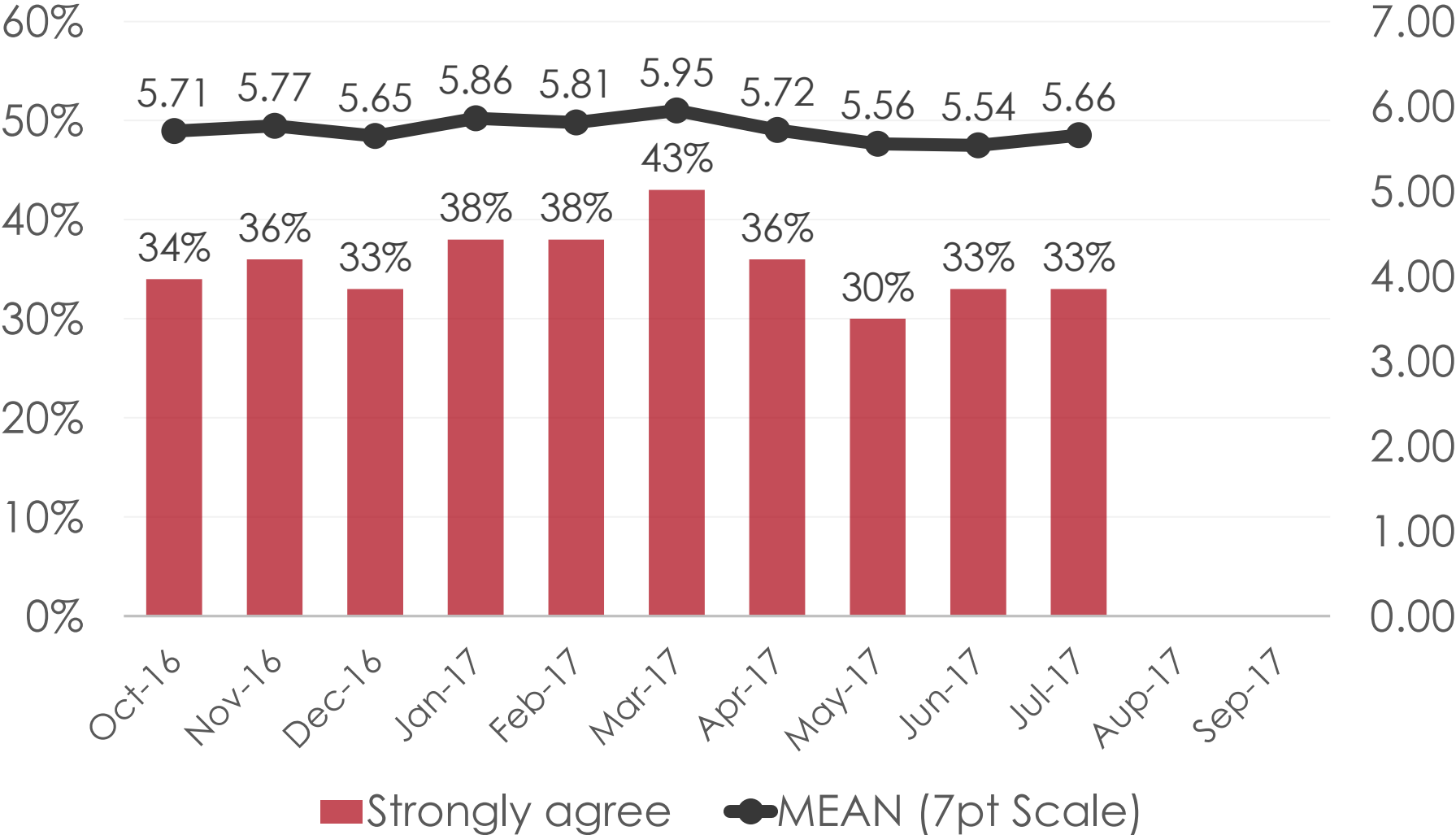
I had no communication problems



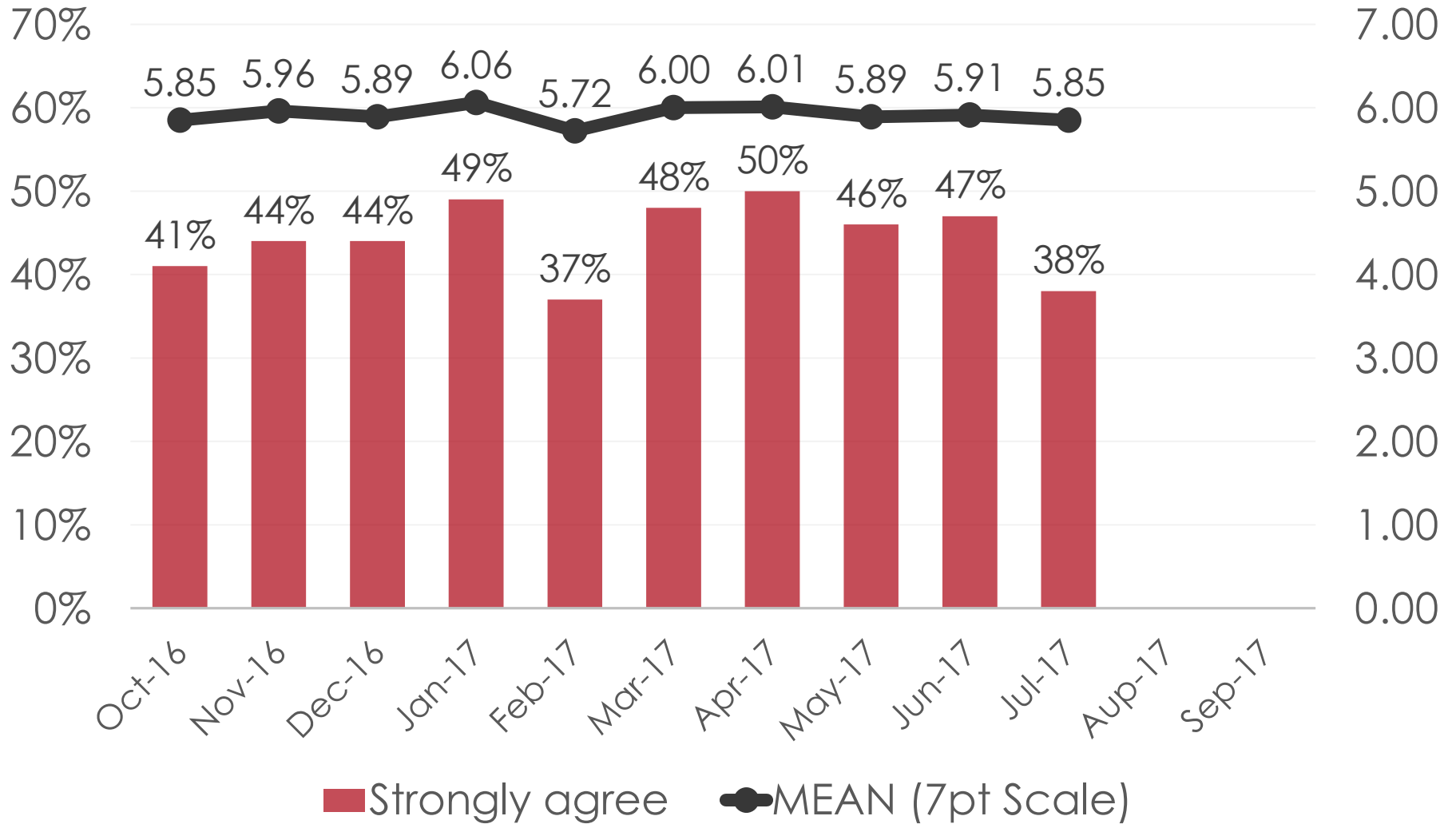
I will recommend Guam to friends



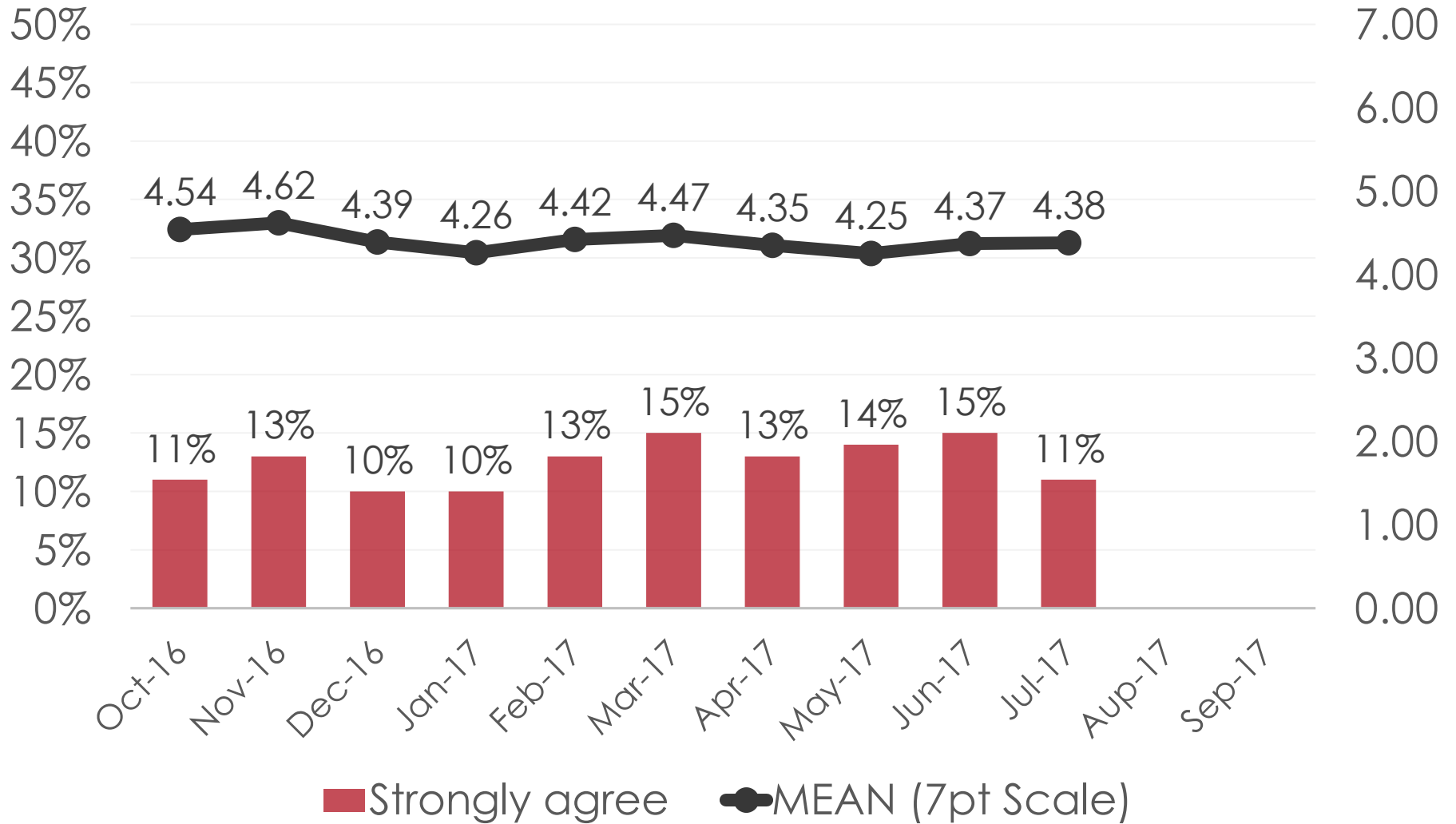
Sites on Guam were attractive



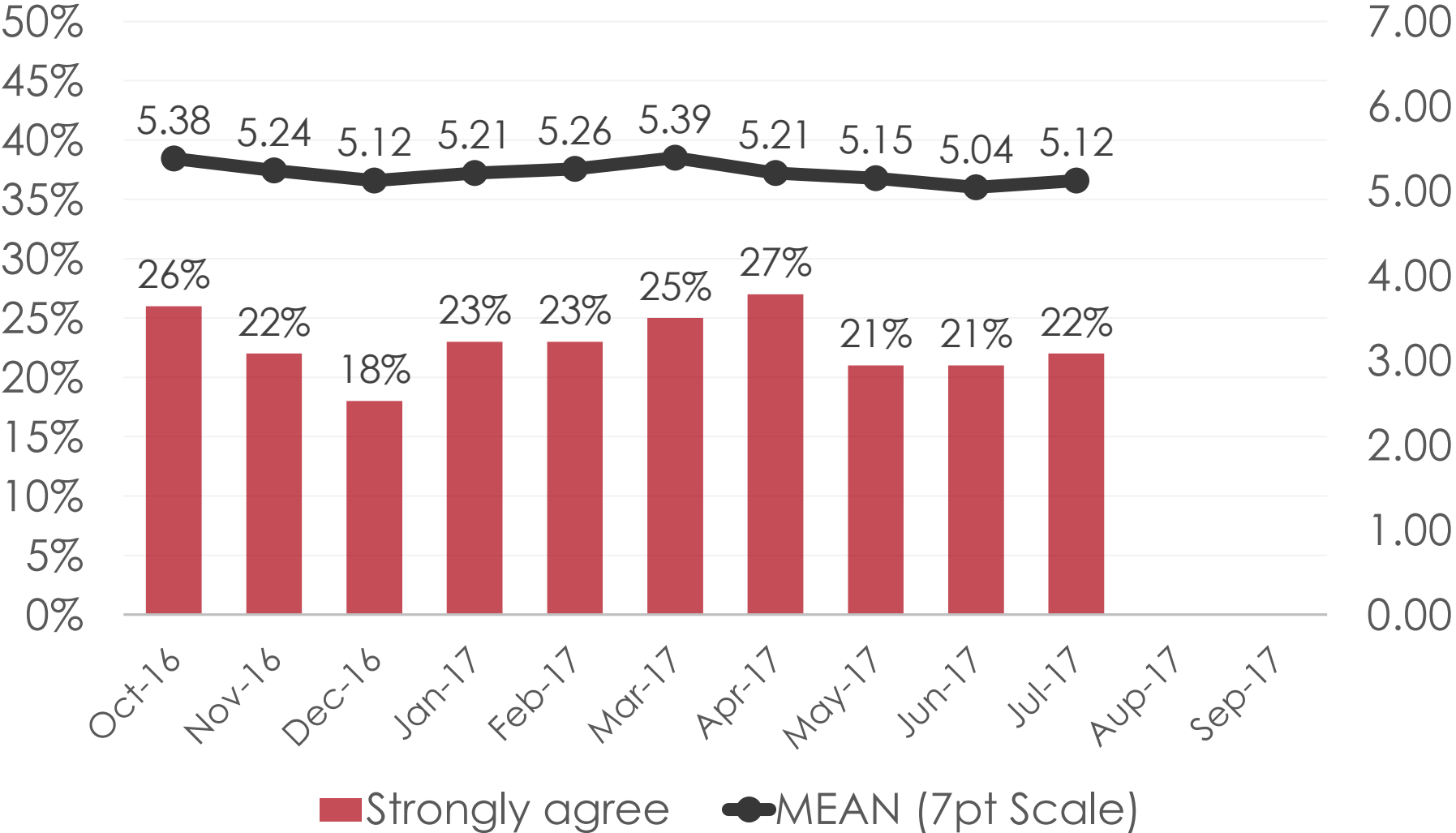
I plan to visit Guam again



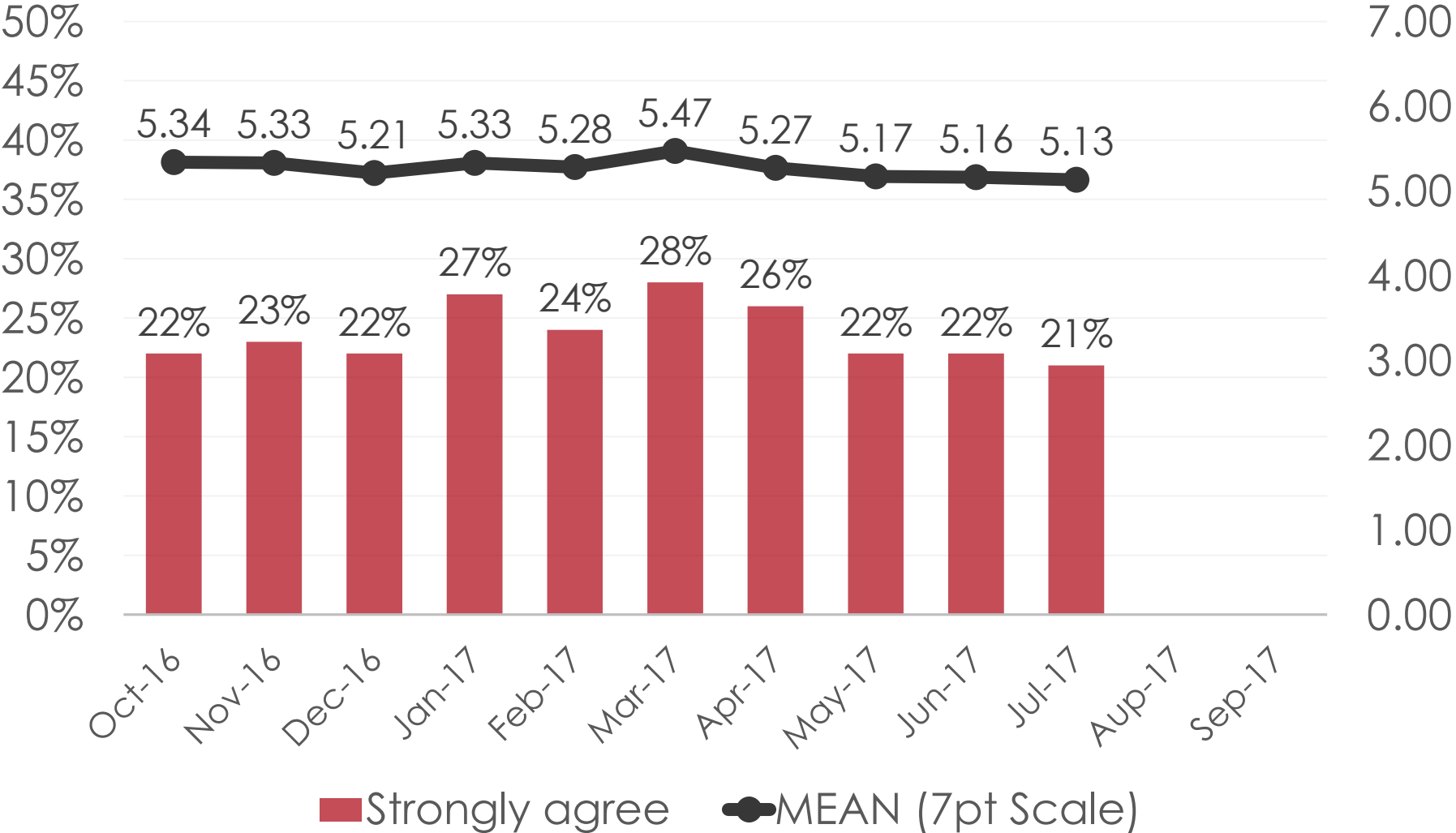
Not enough night time activities



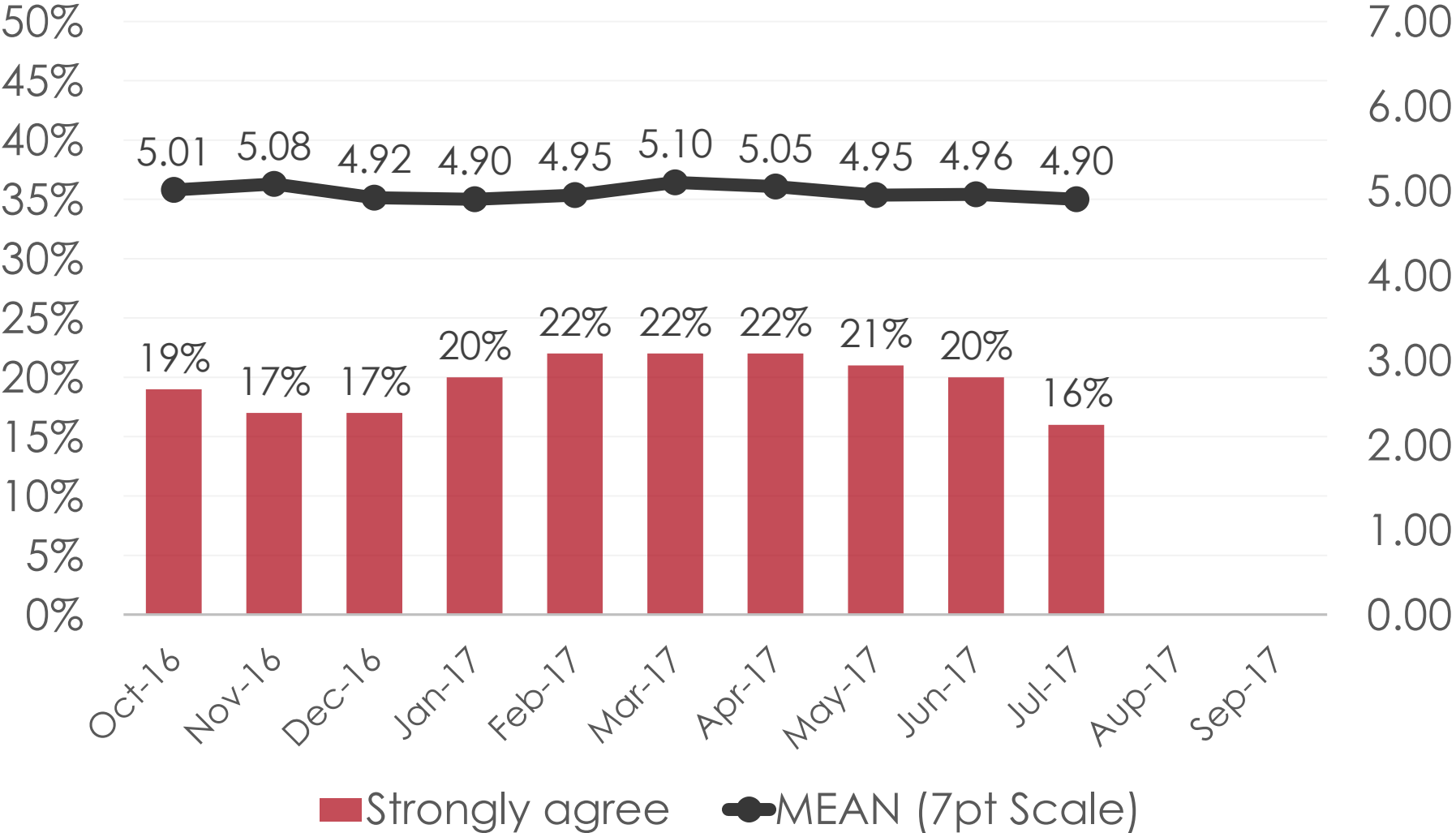
Tour guides were professional



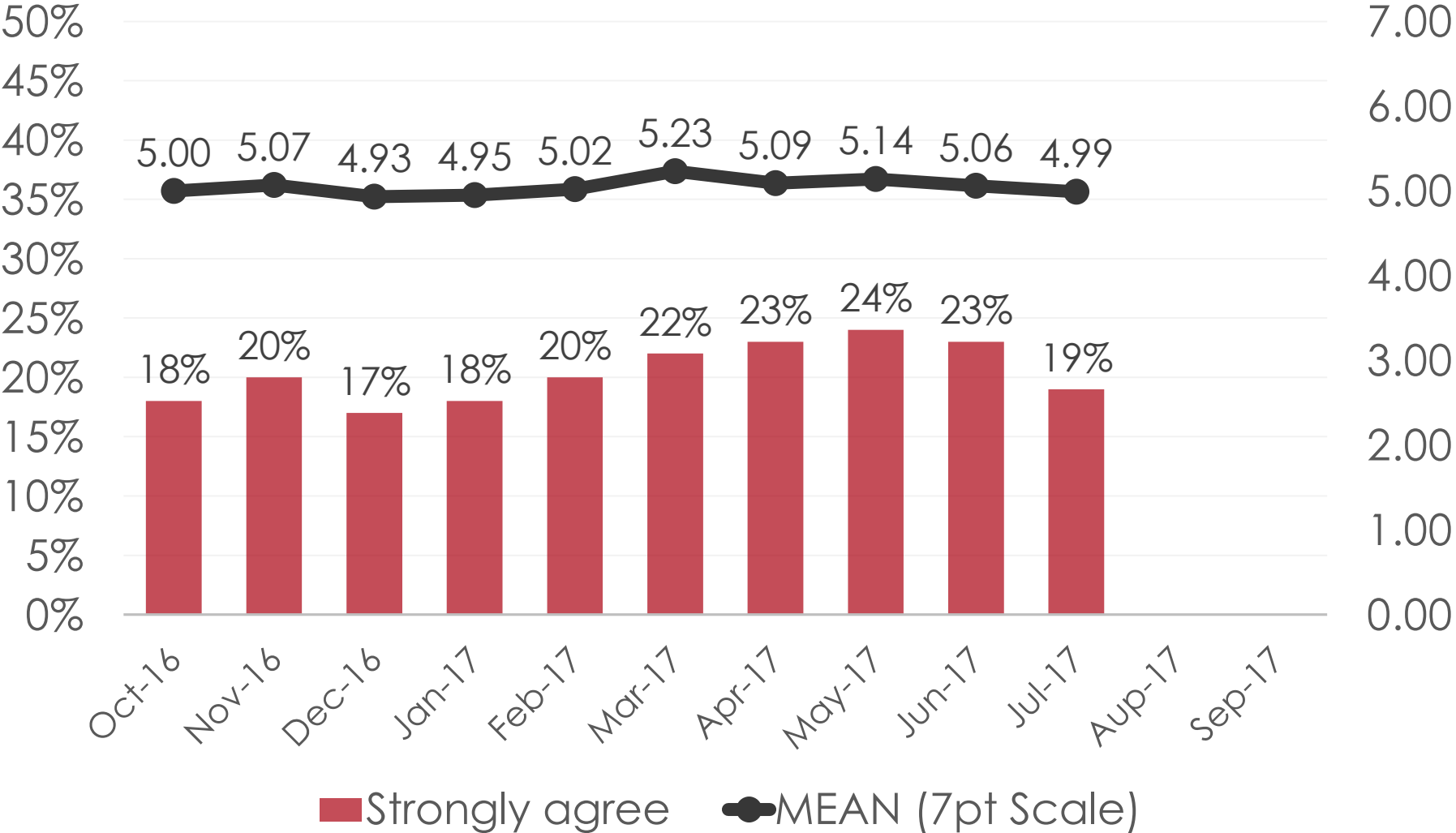
Tour drivers were professional



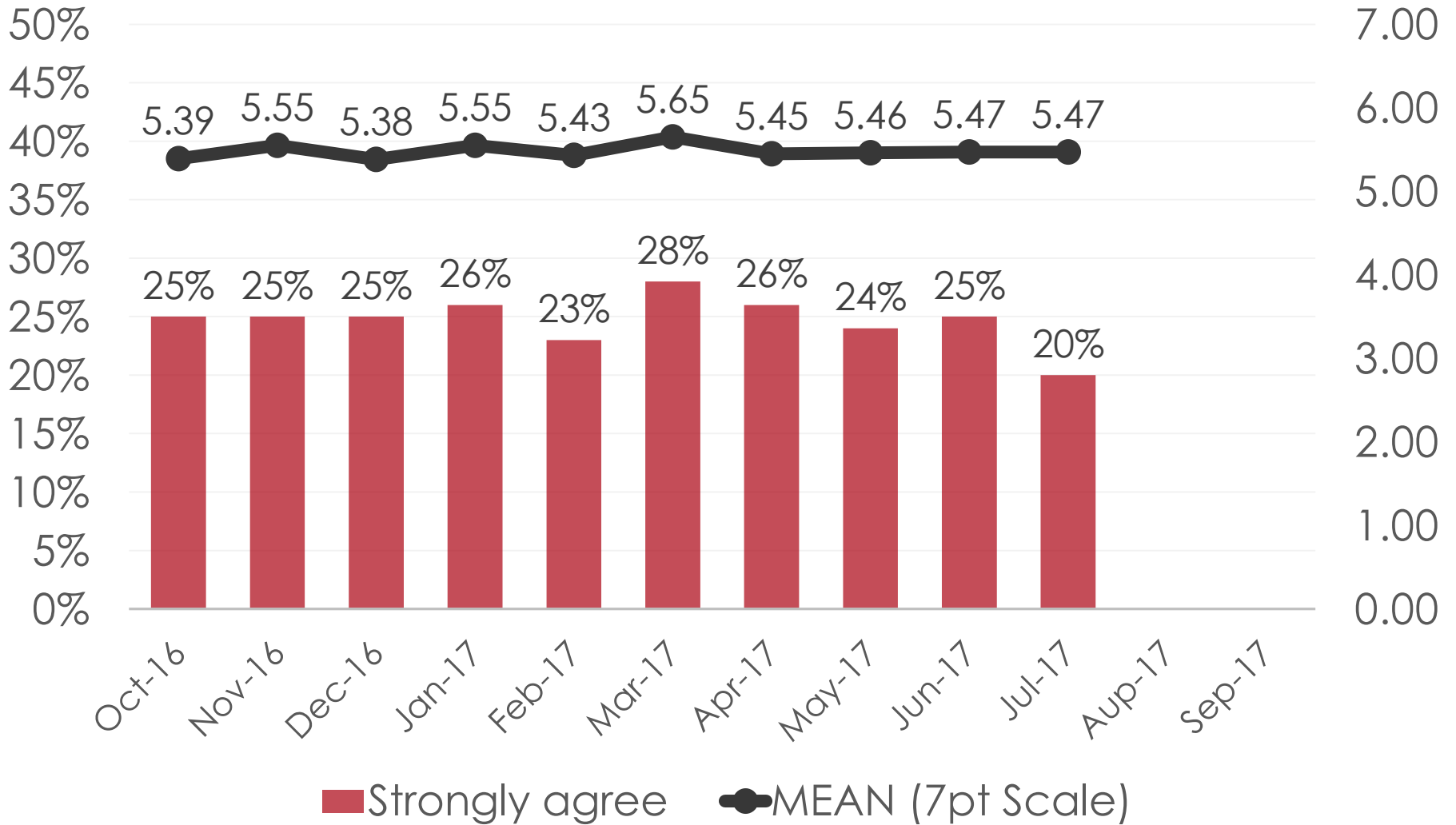
Taxi drivers were professional



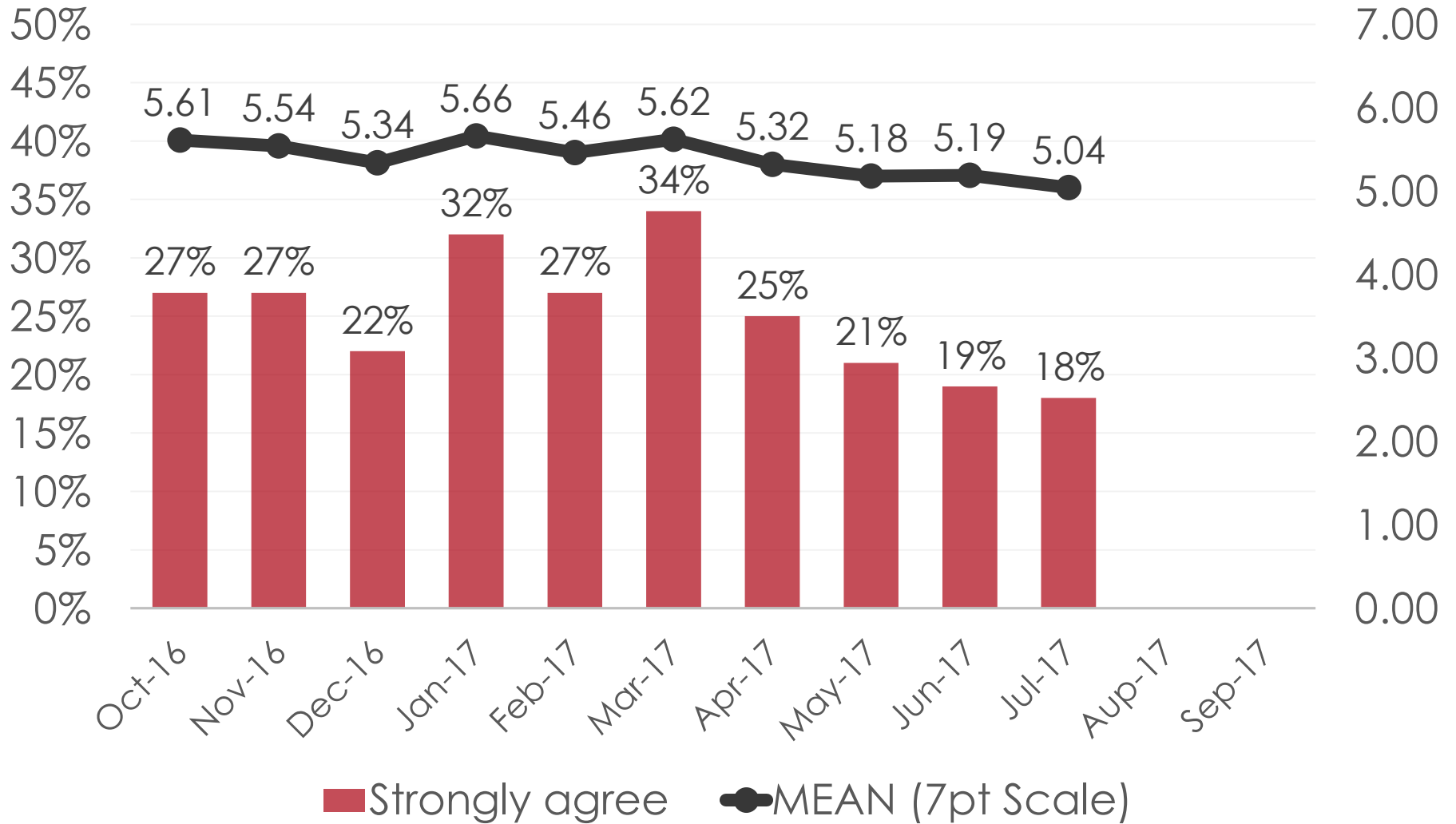
Taxis were clean



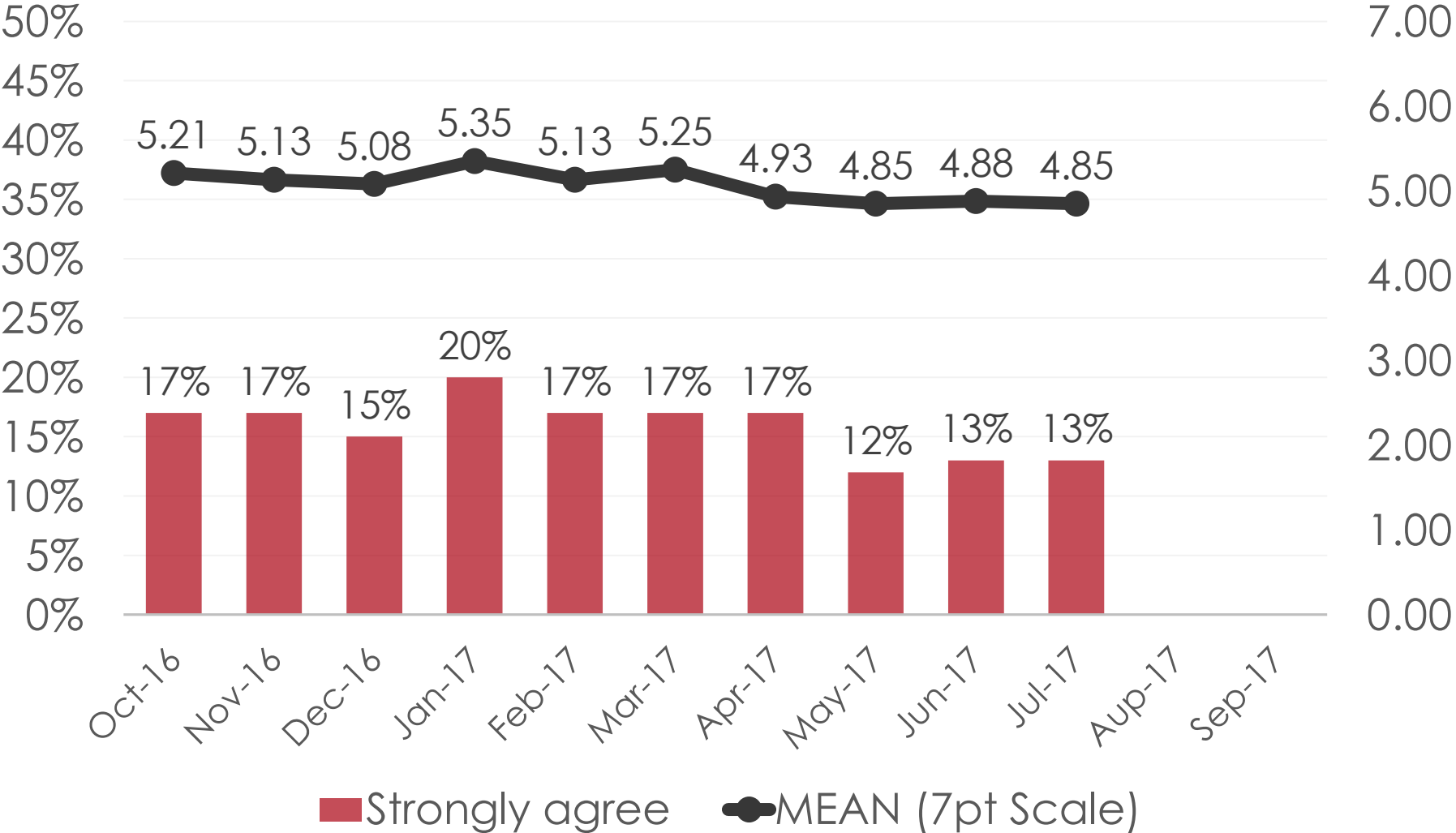
Guam airport was clean



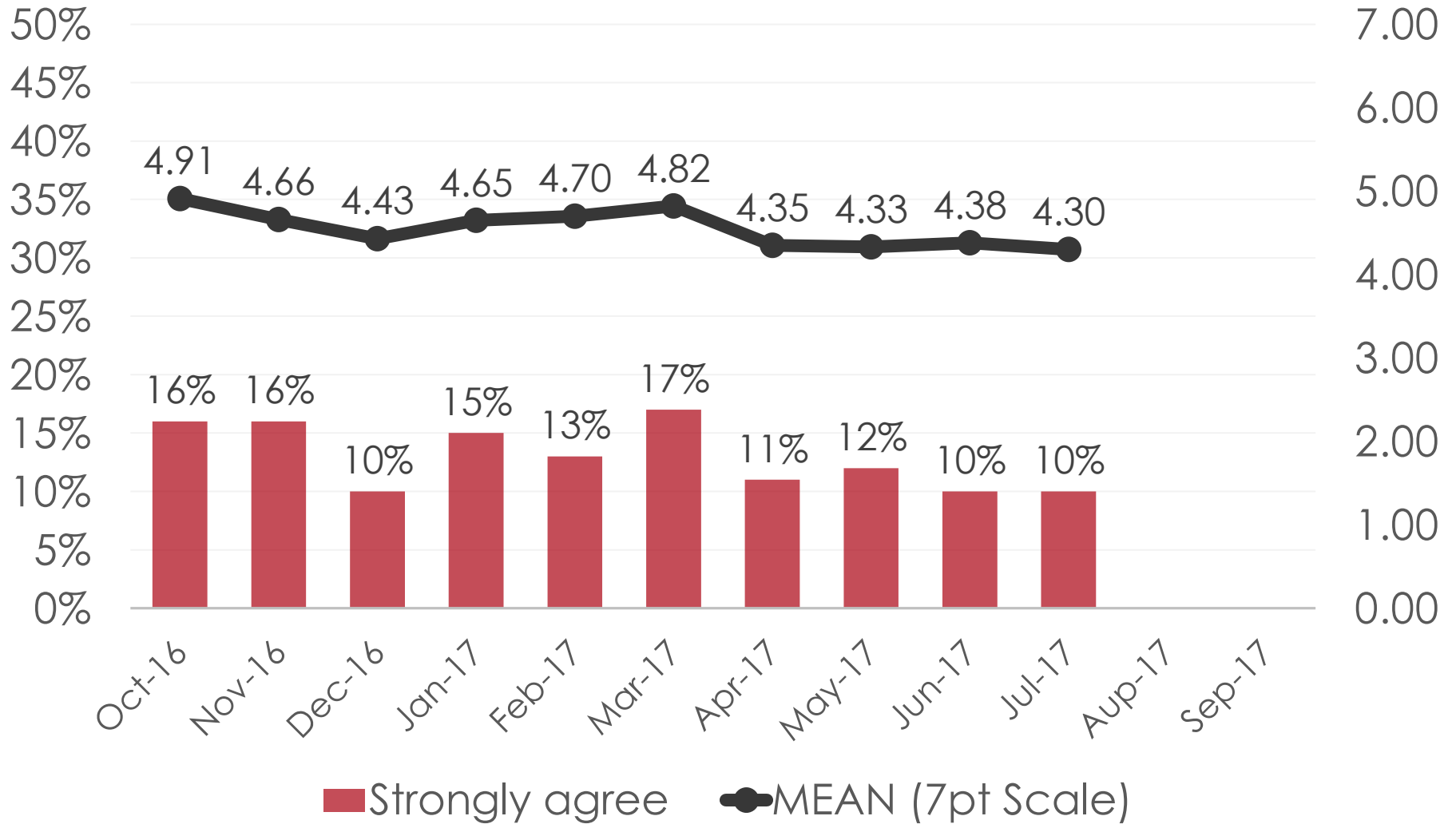
Ease of getting around



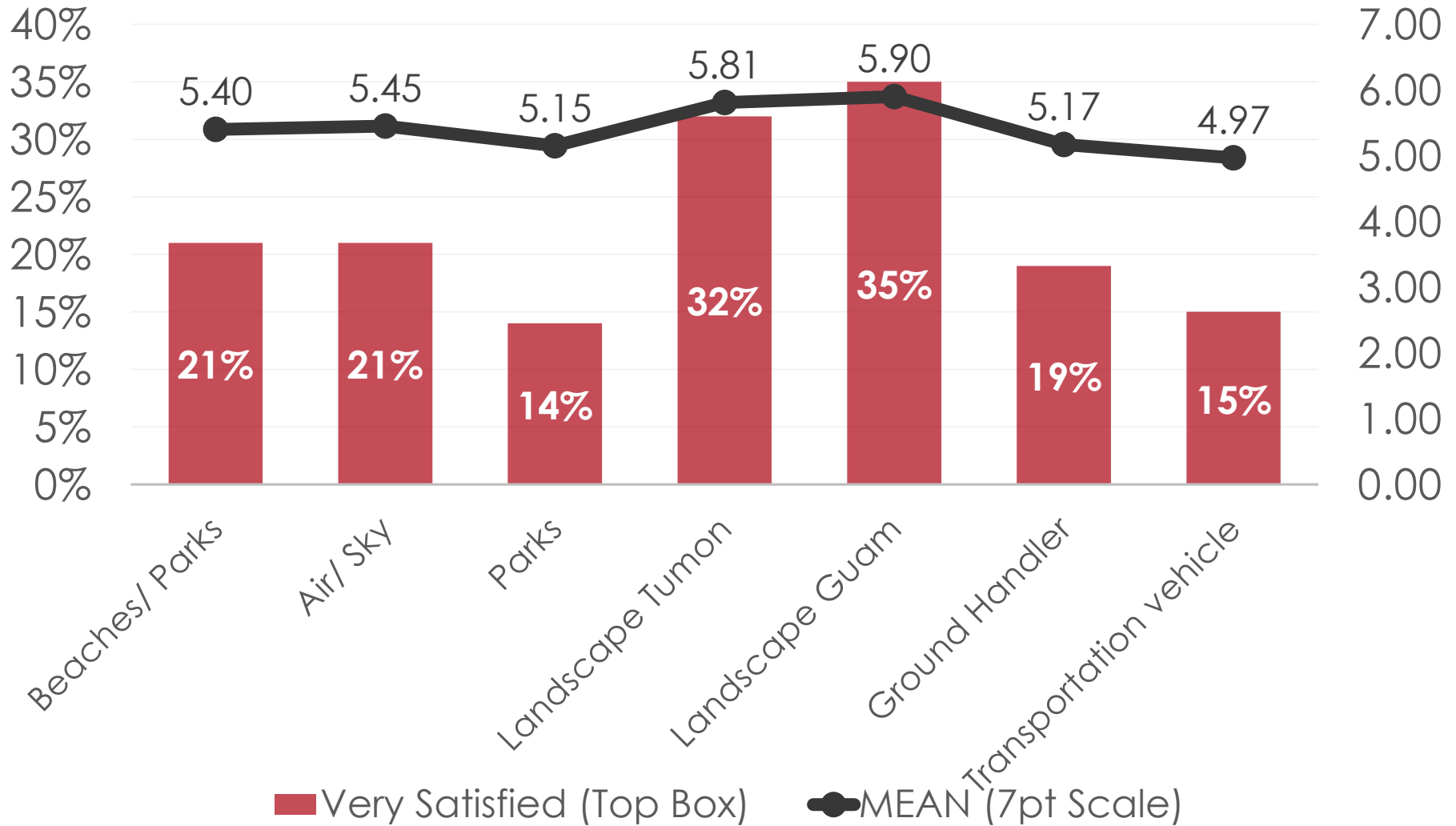
Safety walking around at night



Price of things on Guam

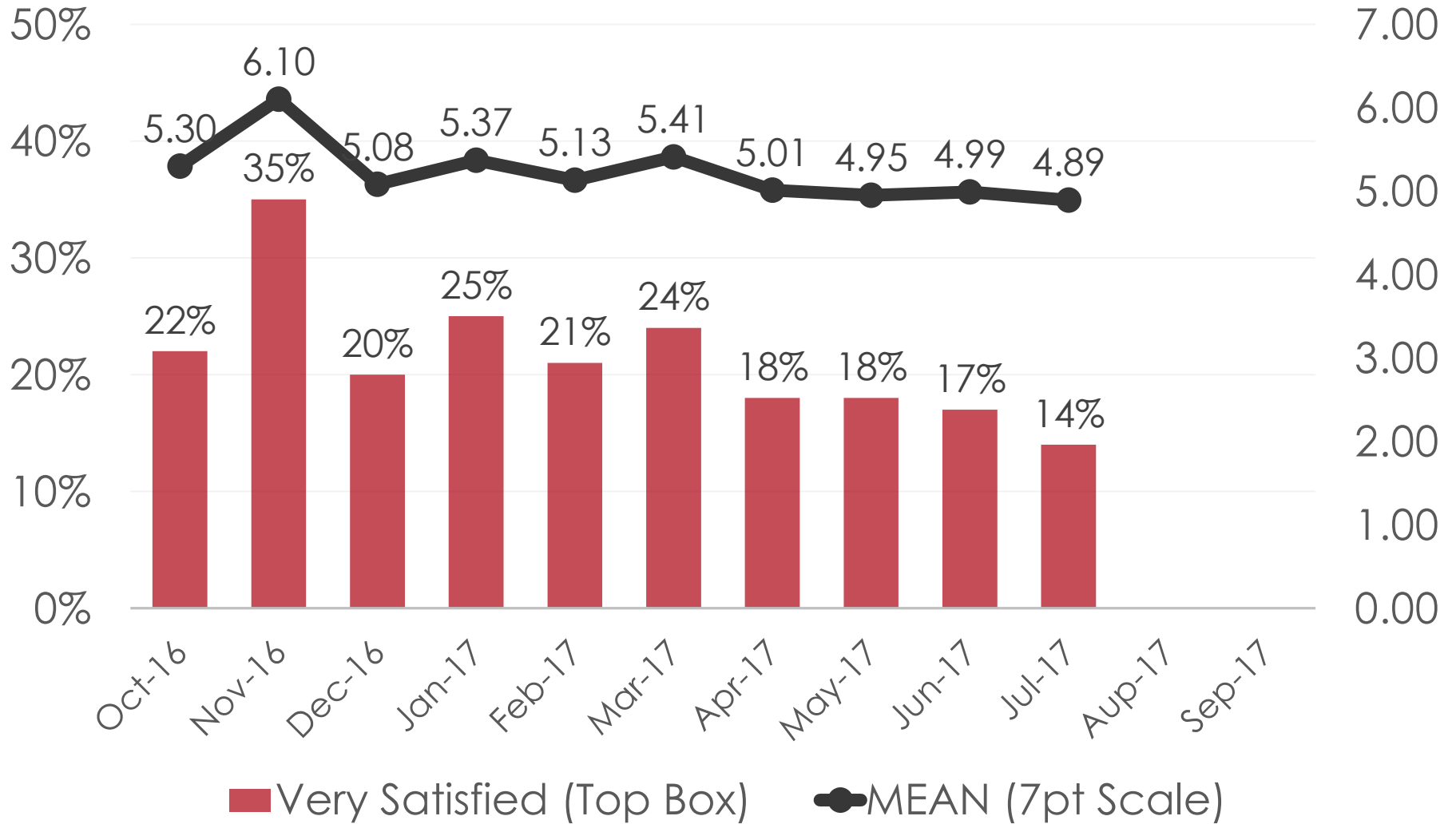


GENERAL SATISFACTION – Quality/ Cleanliness

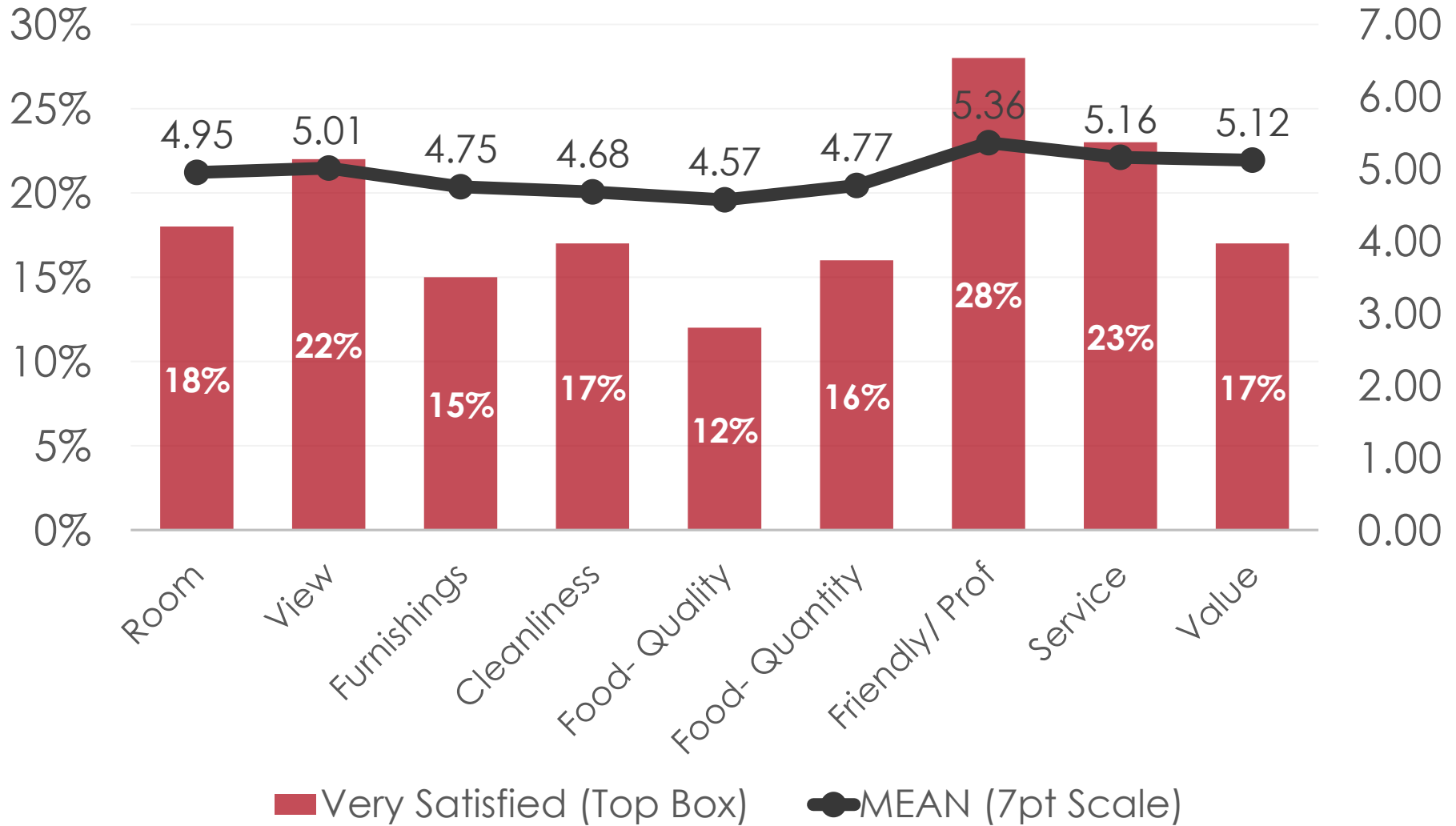


ACCOMMODATIONS

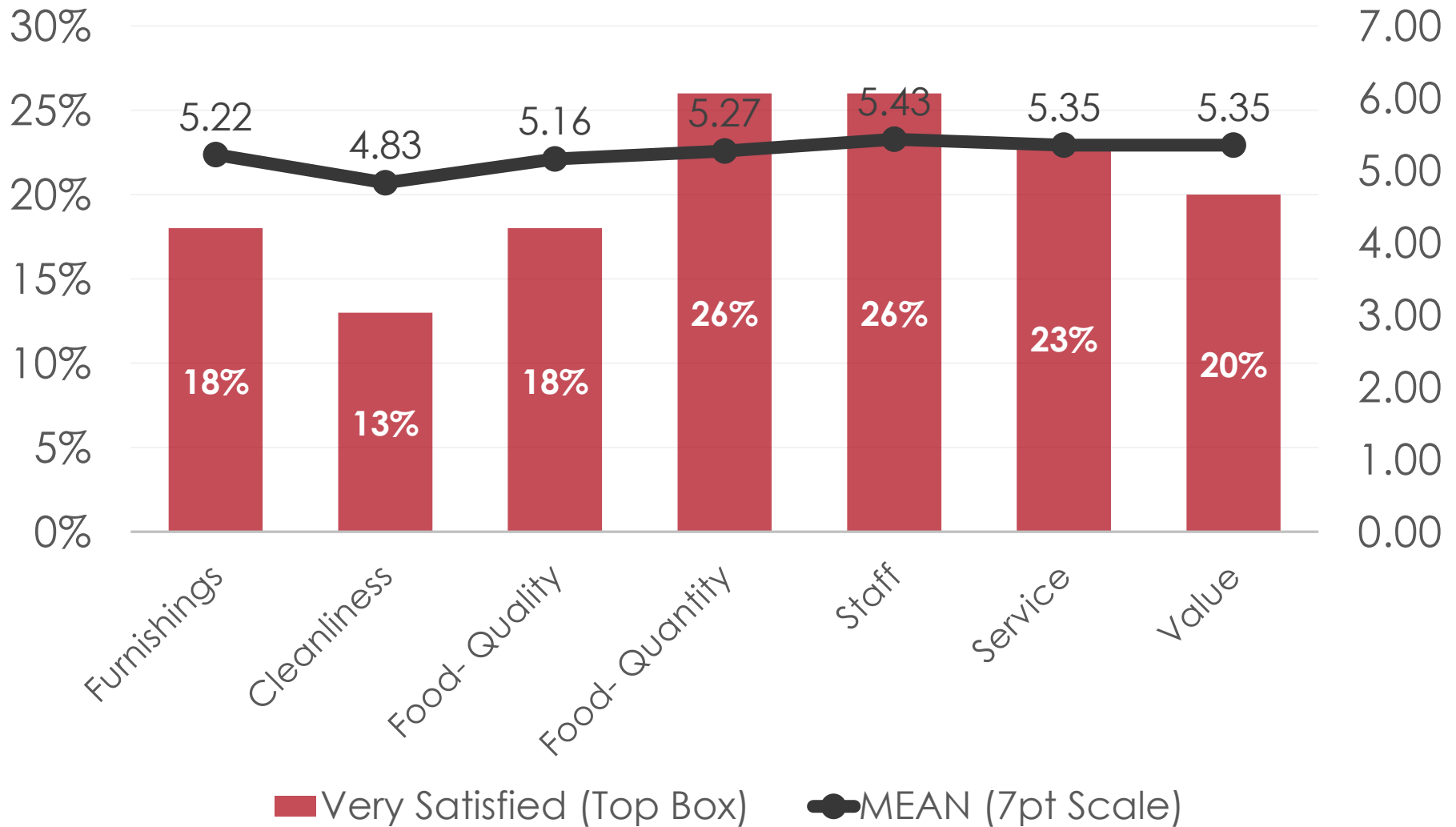
OVERALL SATISFACTION



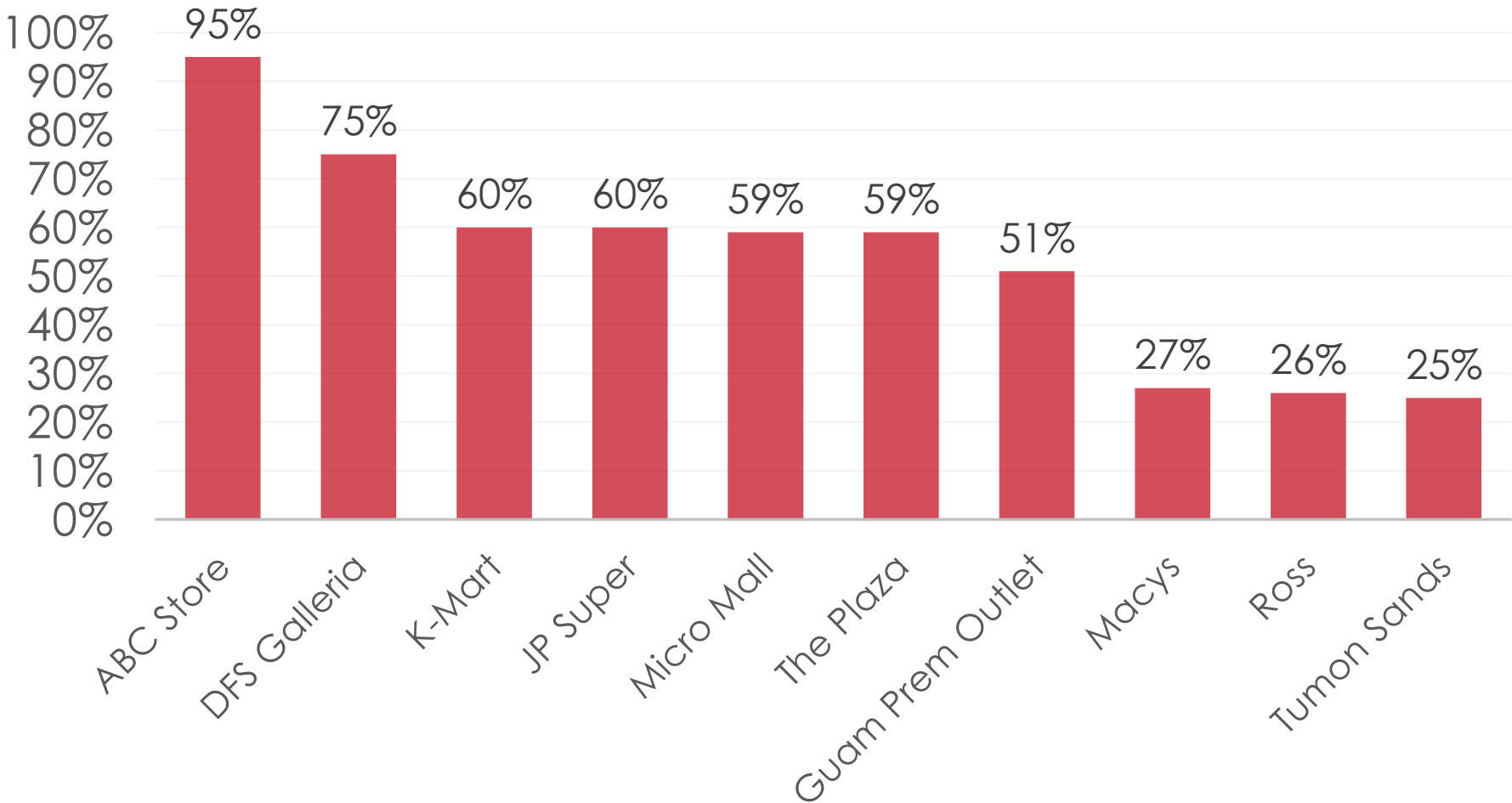
ACCOMMODATIONS – Satisfaction by Category



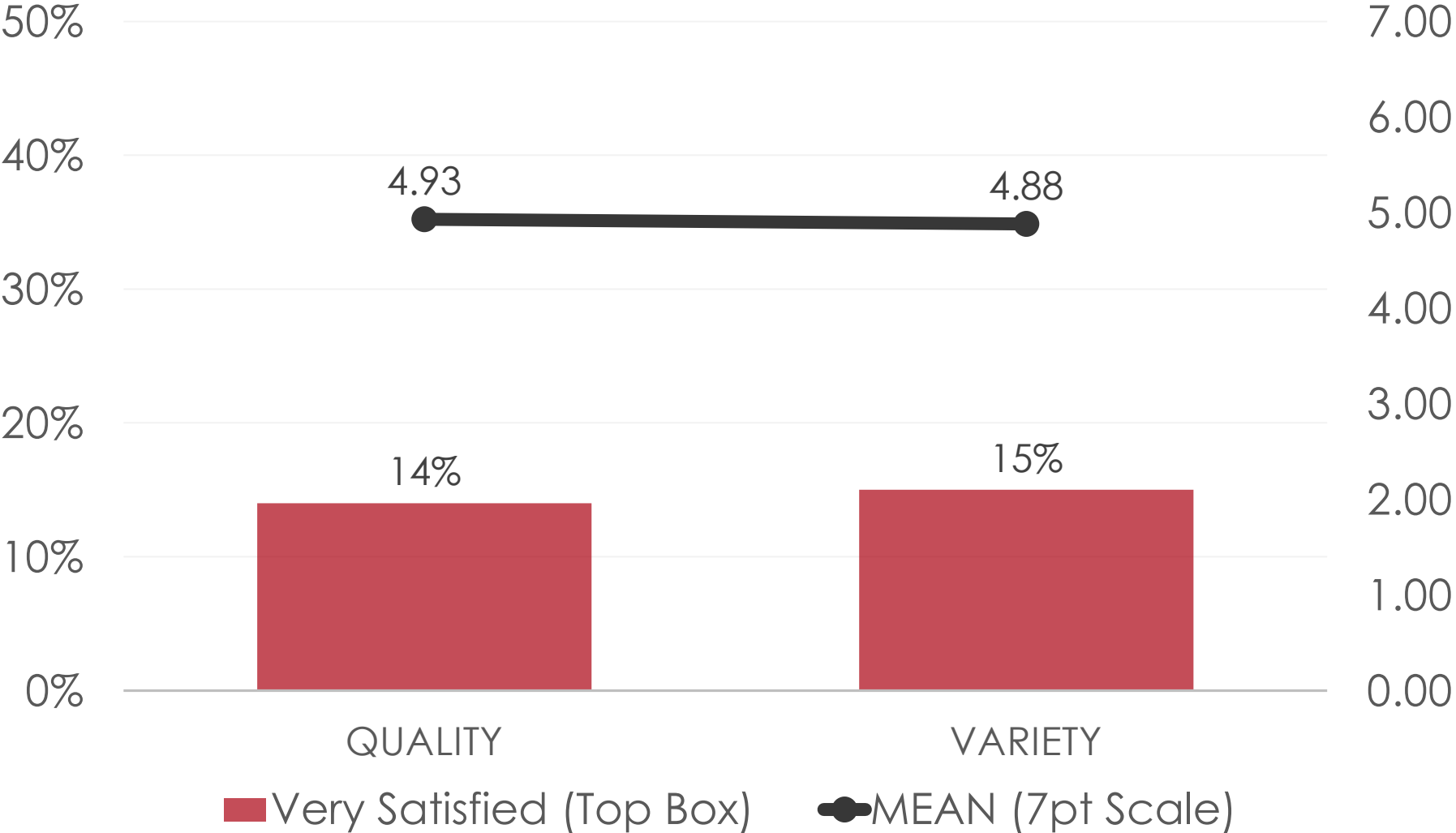
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



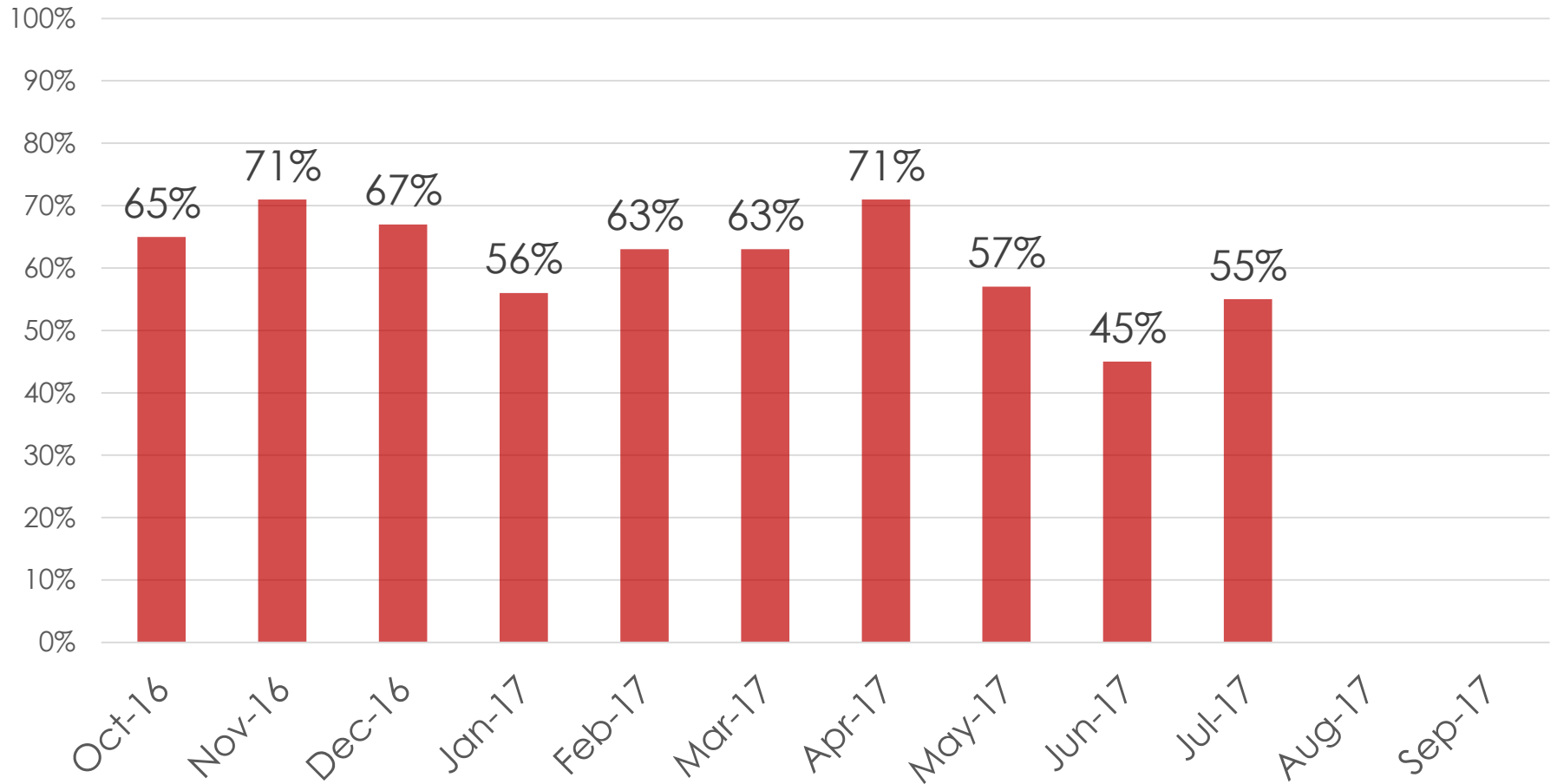
Shopping Malls/ Stores (Top Responses)



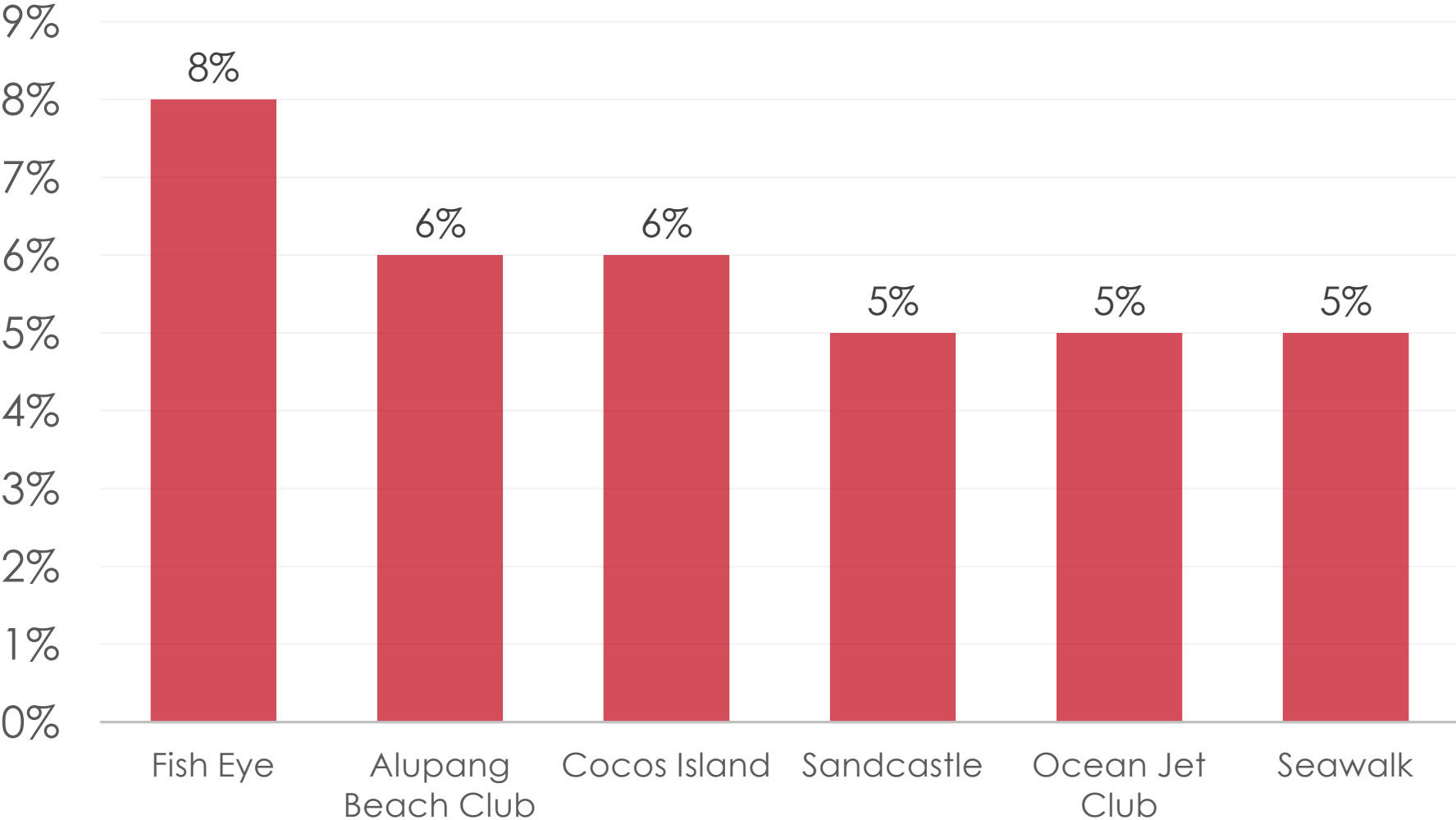
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

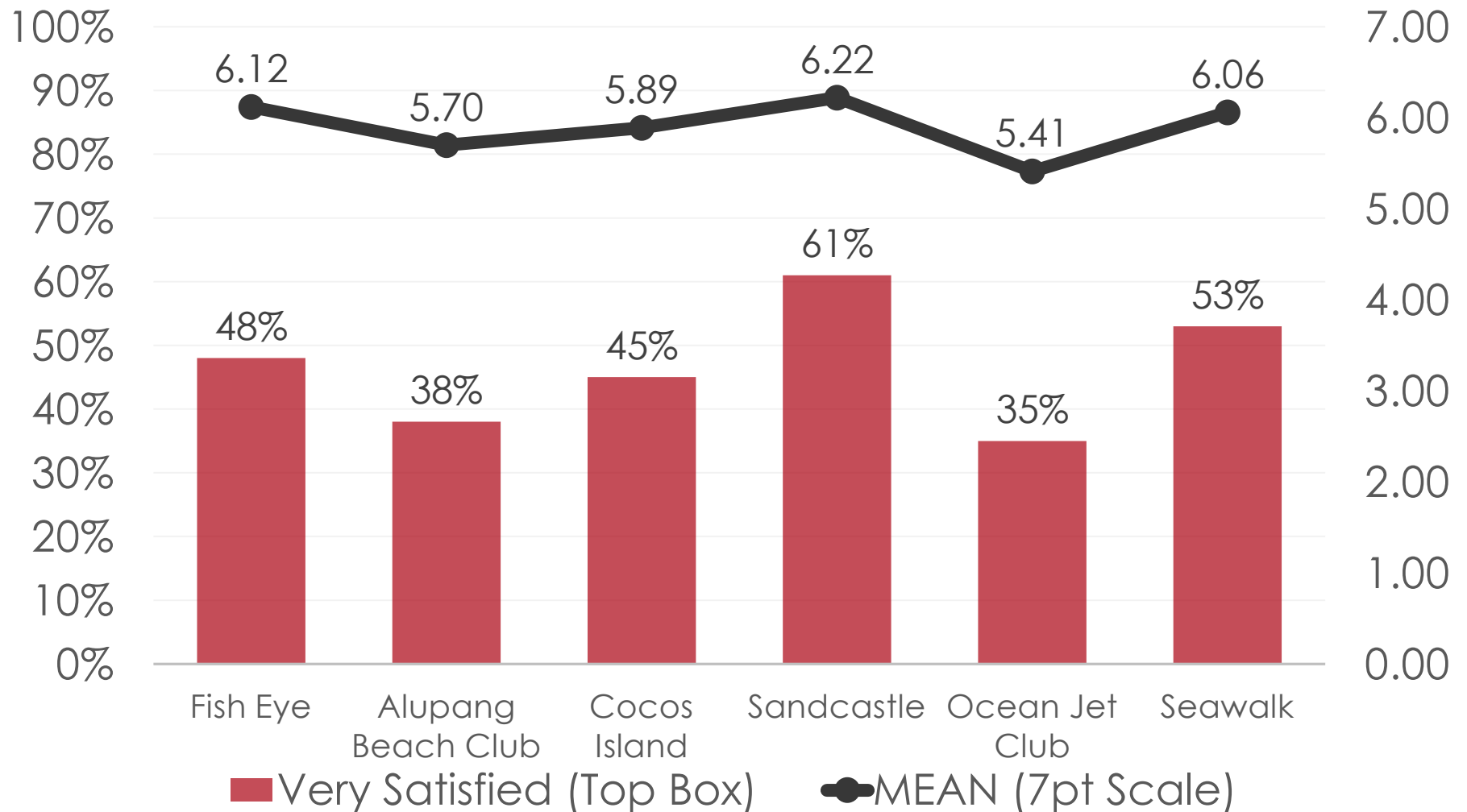


Optional Tour Participation (Top Responses)

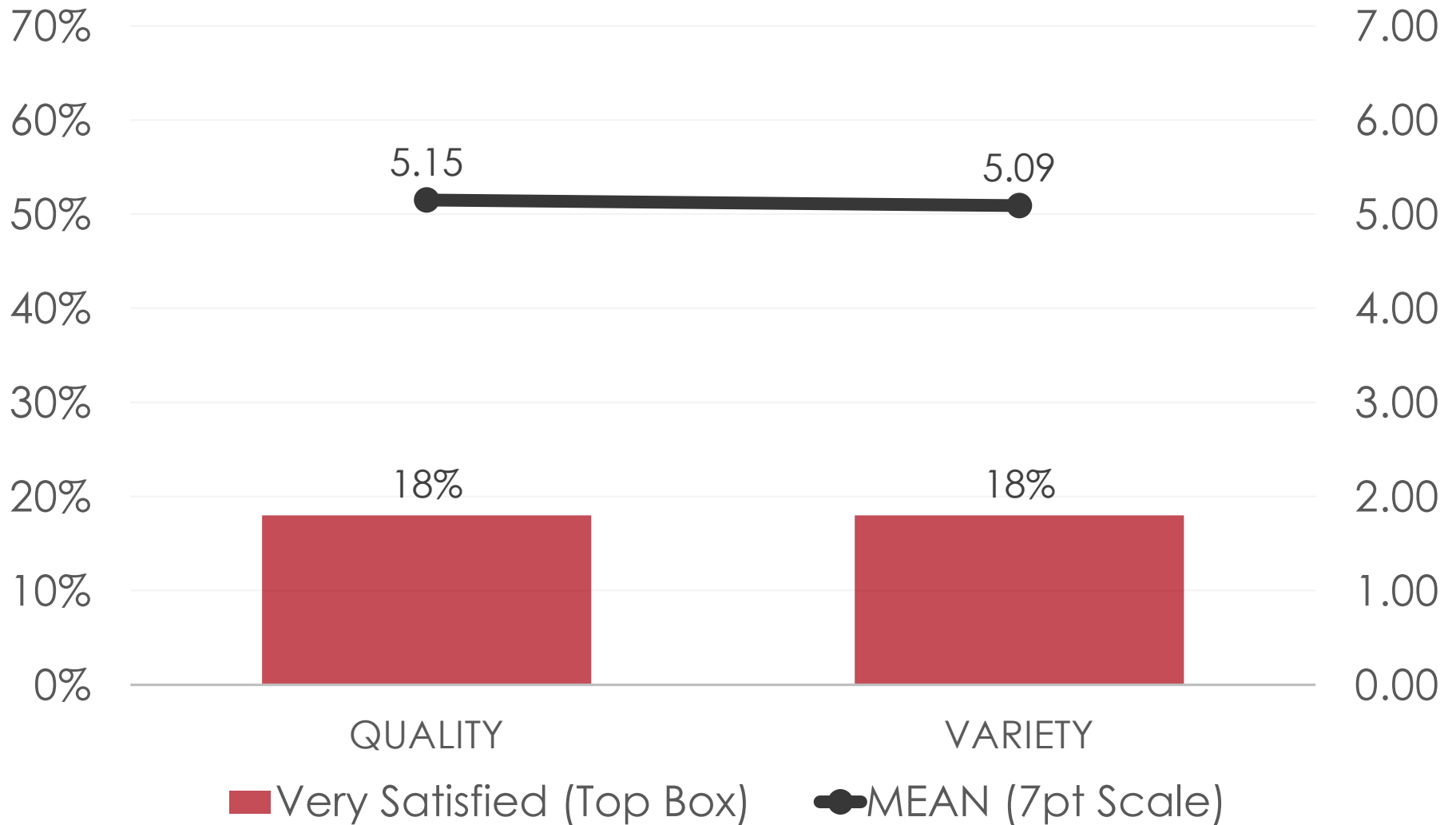


Optional Tour Satisfaction

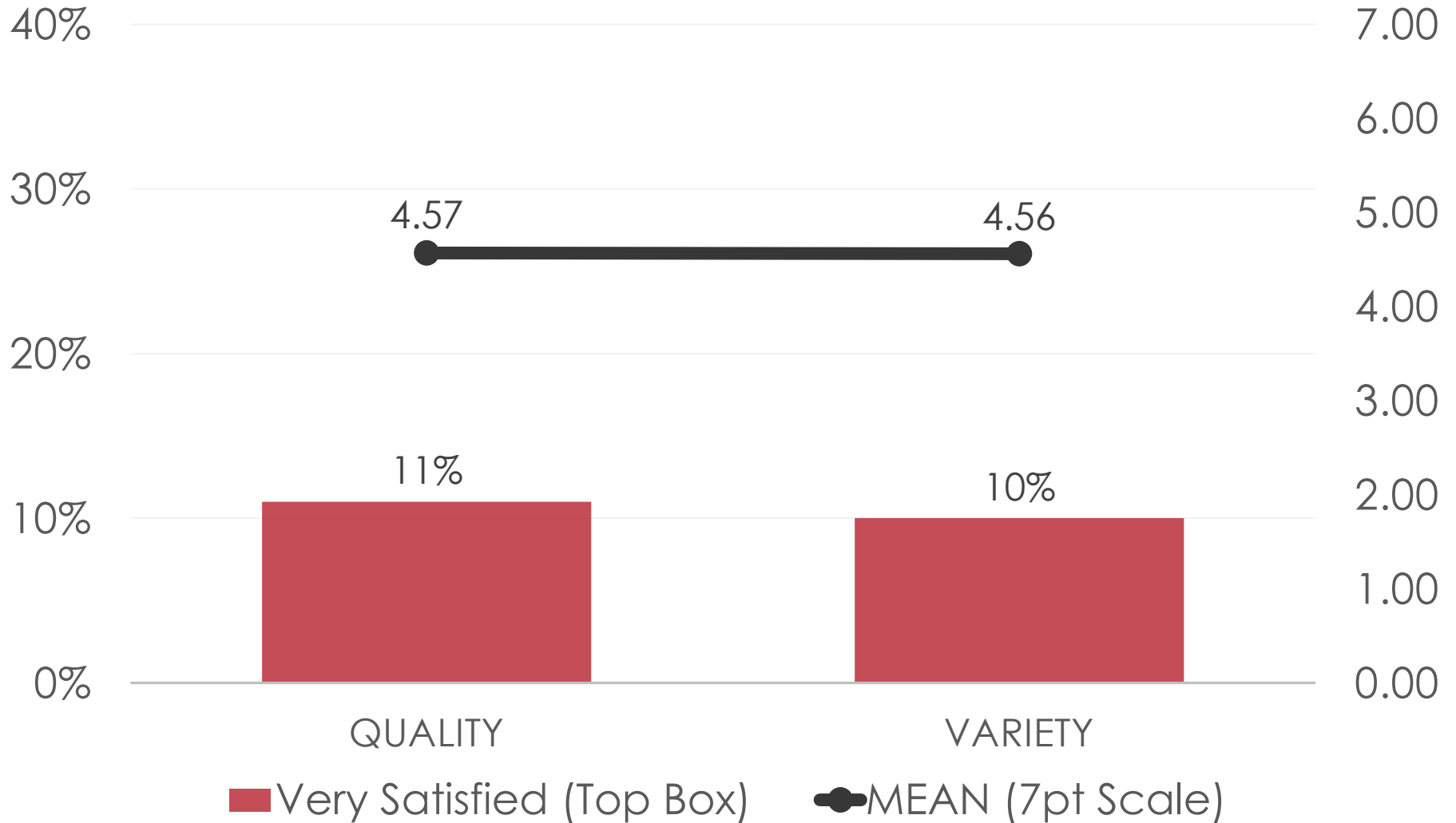
Top Responses only - Participation (5%+)



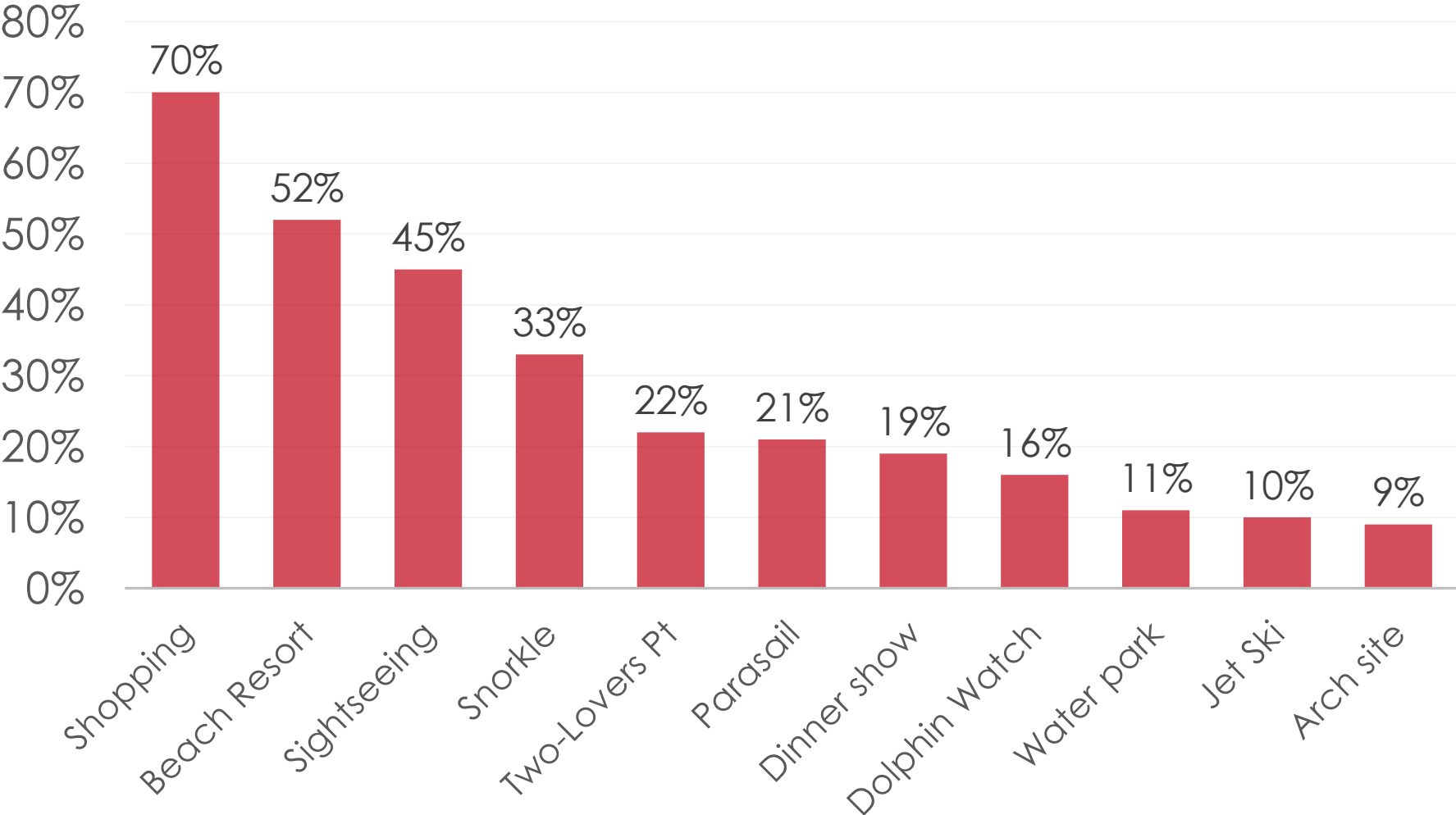
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

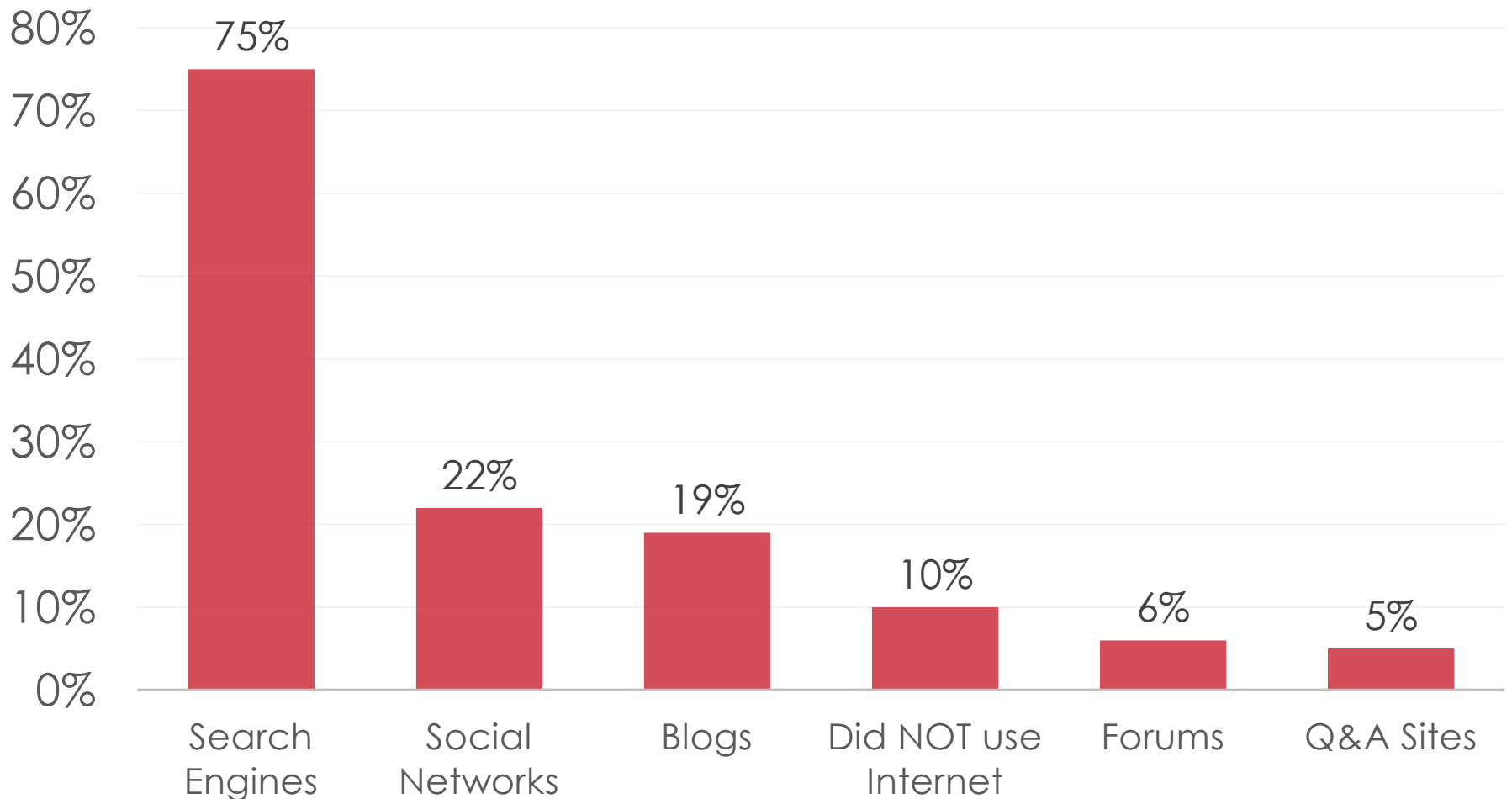


Activities Participation (Top Responses)



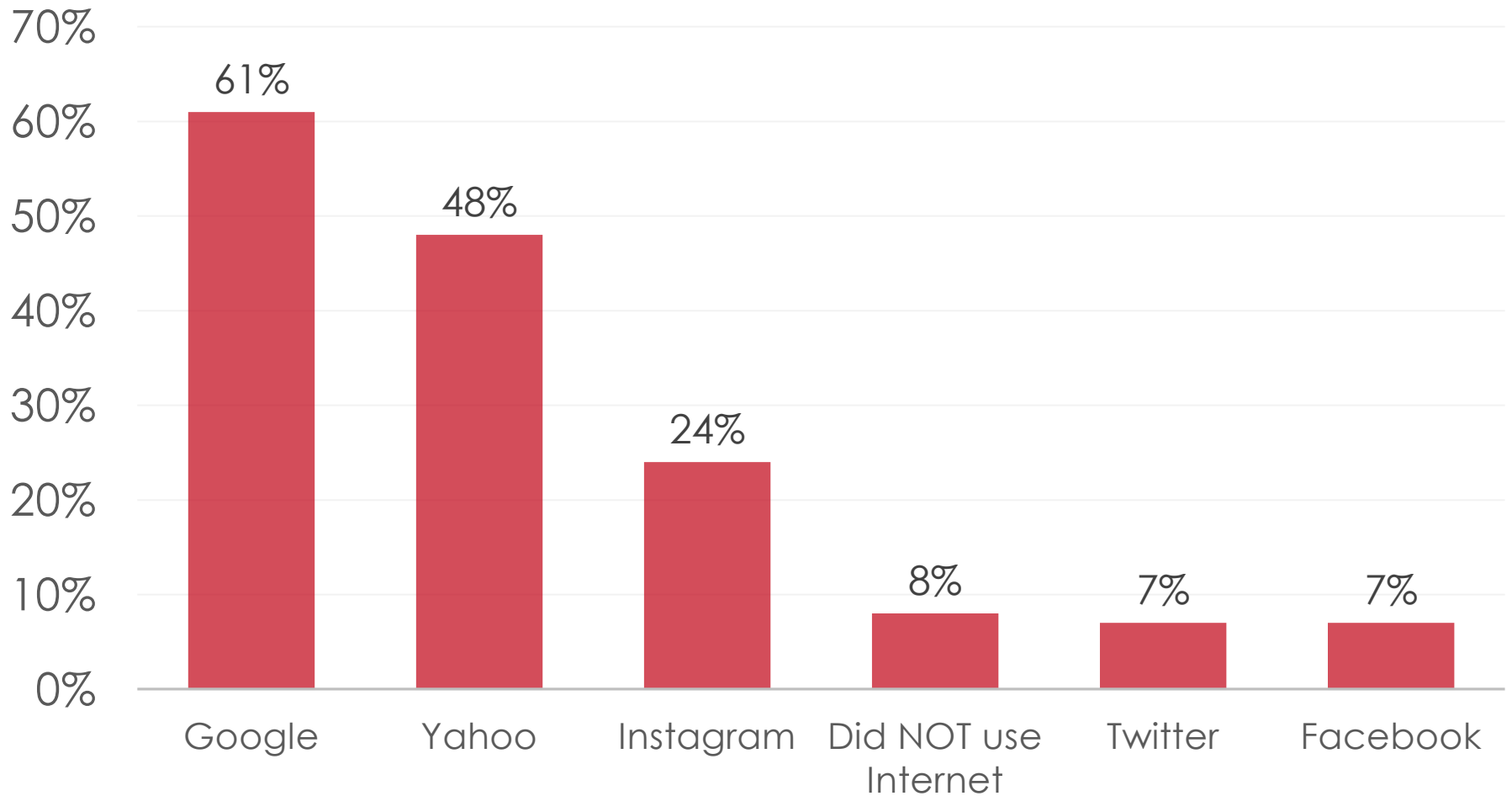
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



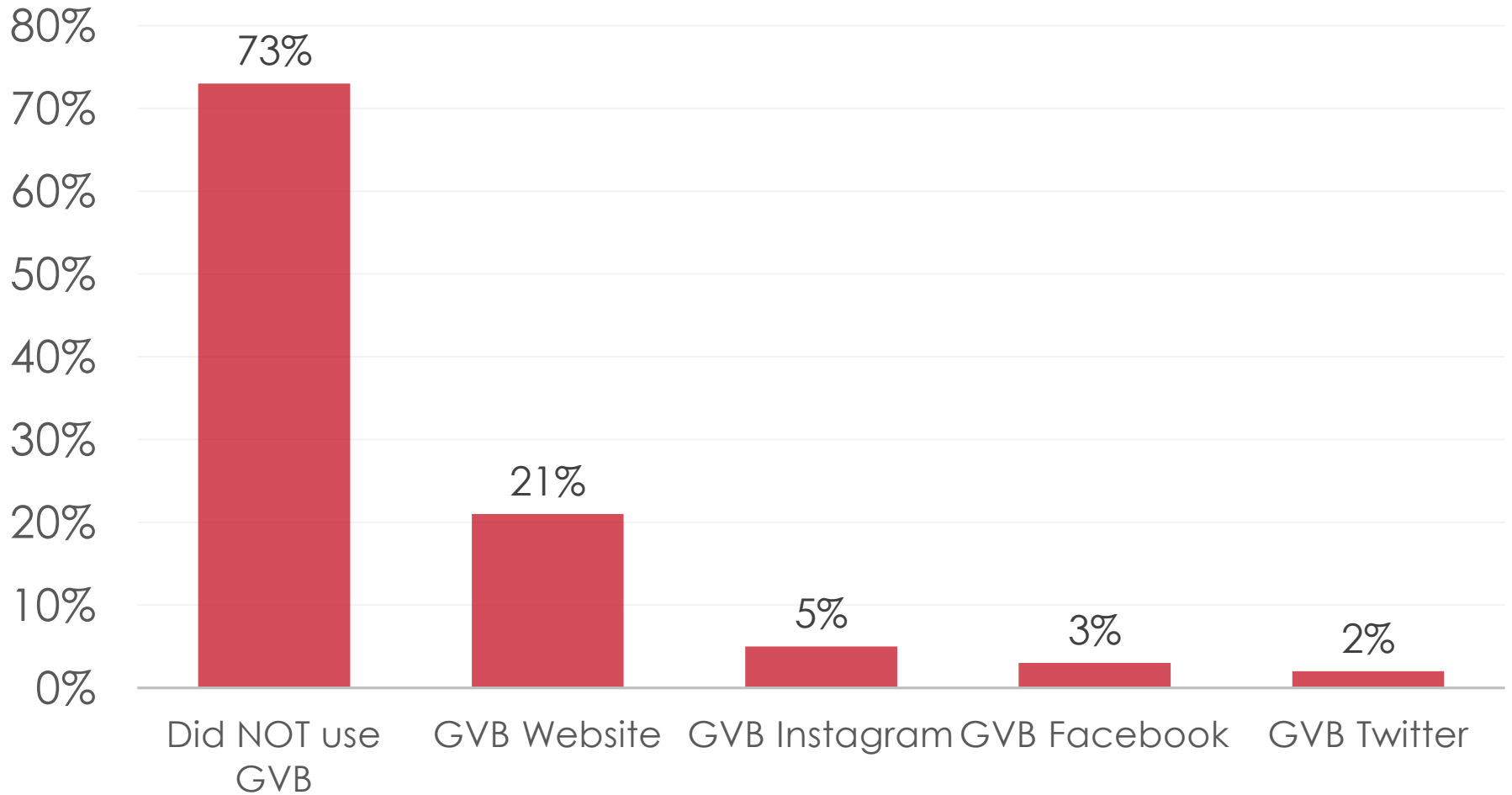
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

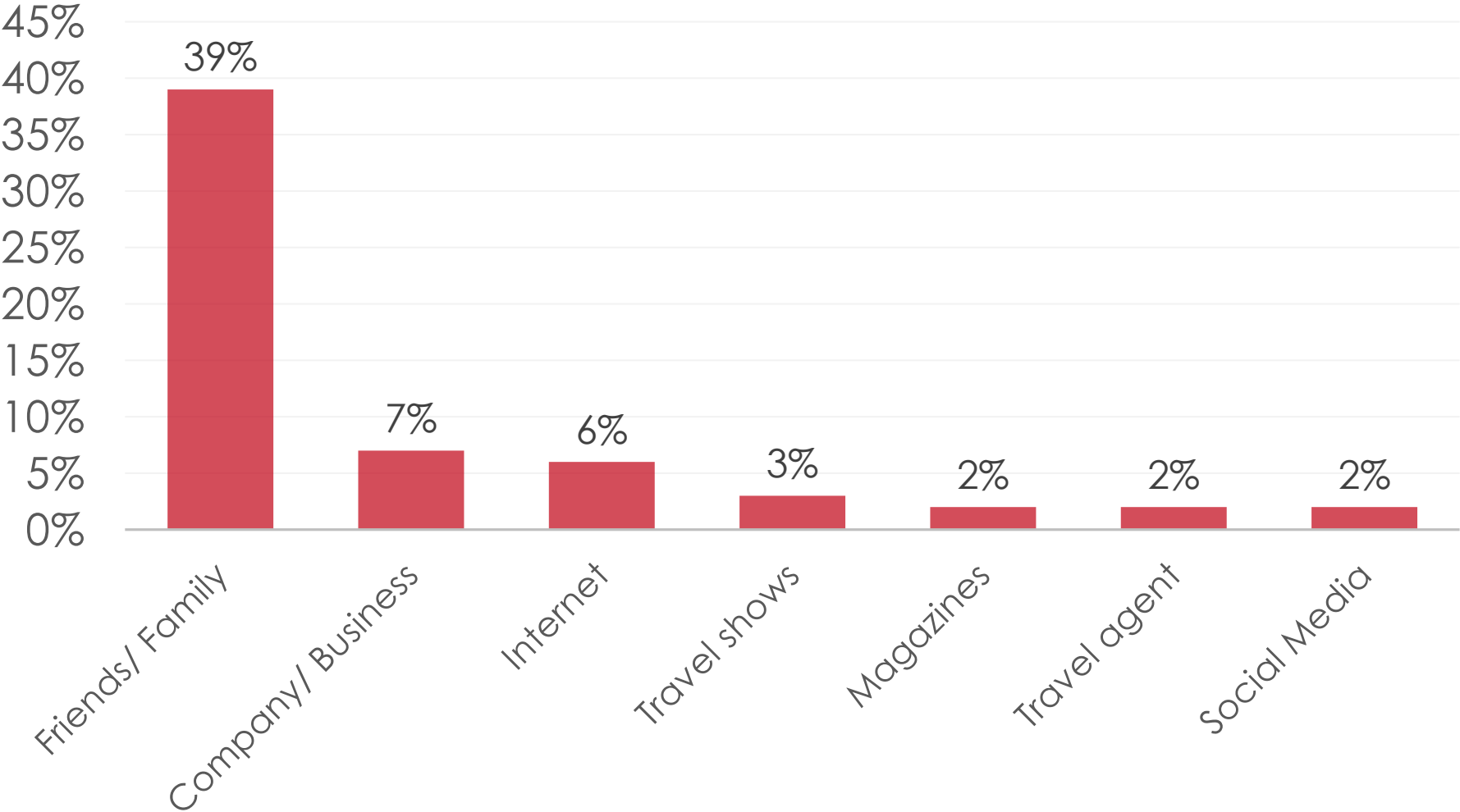


INTERNET- SOURCES OF INFORMATION

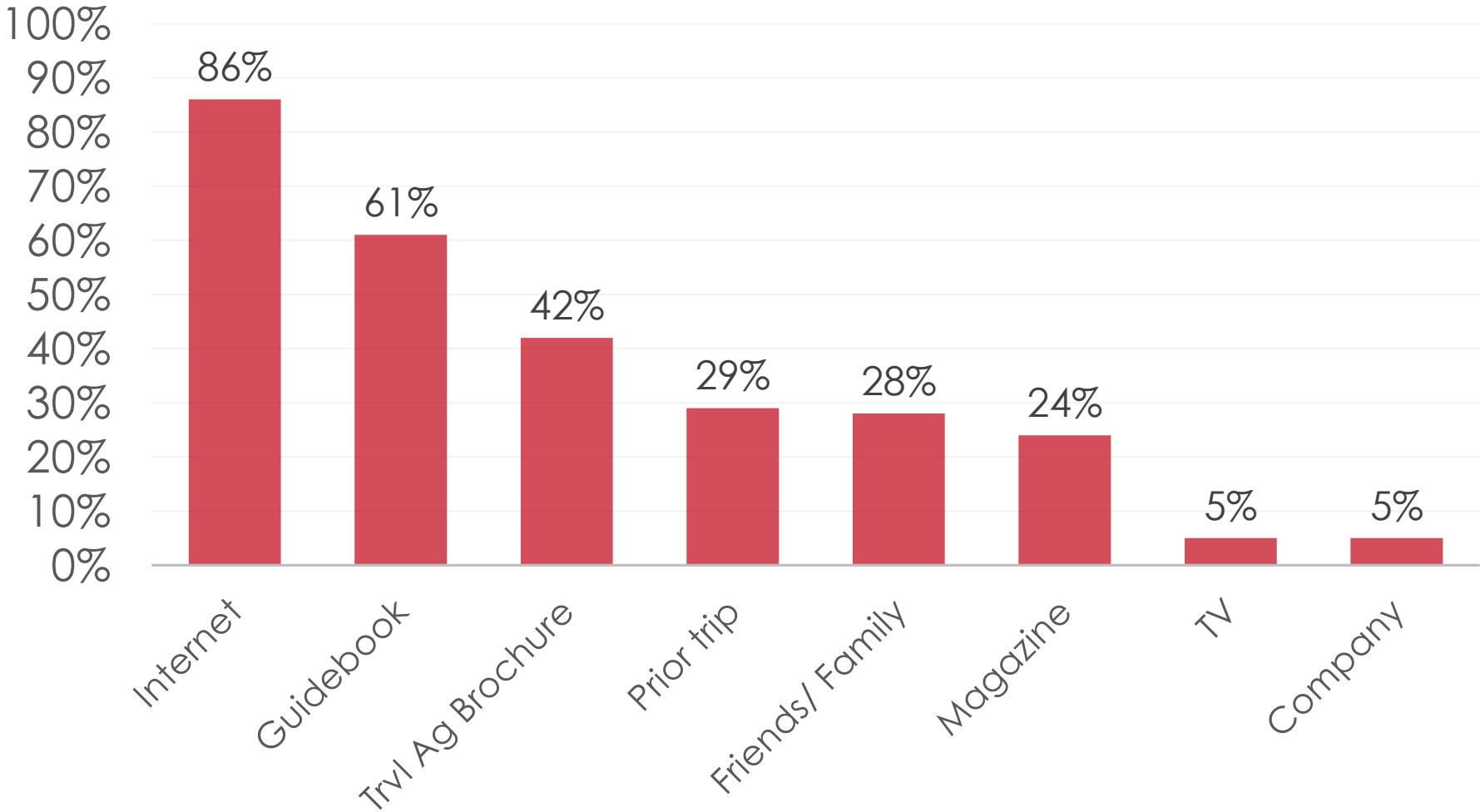
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

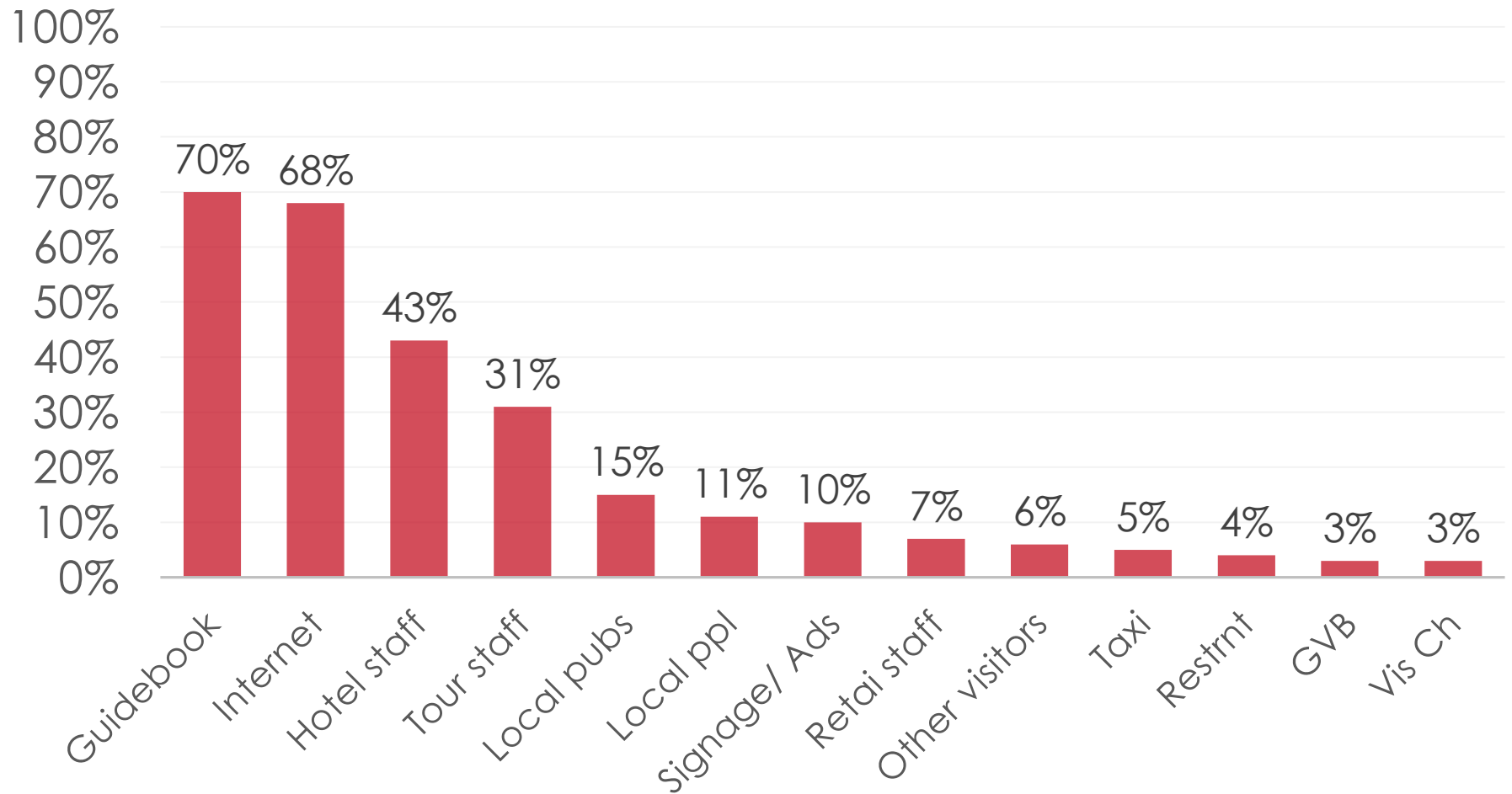
GVB EXIT SURVEY

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 | 86% | 90% | 88% | 78% | | 100% | 100% | 75% |
| | Travel guide book at bookstores | 61% | 60% | 51% | 69% | 67% | 50% | 75% | 55% |
| | Travel agent brochure | 42% | 42% | 29% | 46% | 67% | | 17% | 45% |
| | I have been to Guam before | 29% | 35% | 58% | 27% | 33% | 50% | 25% | 27% |
| | Friend or relative | 28% | 24% | 23% | 36% | 33% | | 25% | 33% |
| | Magazine (consumer) | 24% | 24% | 22% | 20% | 33% | 50% | 42% | 24% |
| | TV | 5% | 5% | 4% | | 33% | | | 9% |
| | Co-worker/ company travel department | 5% | 2% | 2% | 2% | | 50% | 17% | 13% |
| | Consumer travel shows | 3% | 2% | 2% | | | | | 1% |
| | Guam Visitors Bureau promotional activities | 1% | 1% | 3% | | | | | 2% |
| | Guam Visitors Bureau office | 1% | 2% | 2% | 2% | | | | 4% |
| | Newspaper | 1% | 1% | 1% | 2% | | | | 2% |
| | Total | 350 | 168 | 179 | 59 | 3 | 2 | 12 | 89 |

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

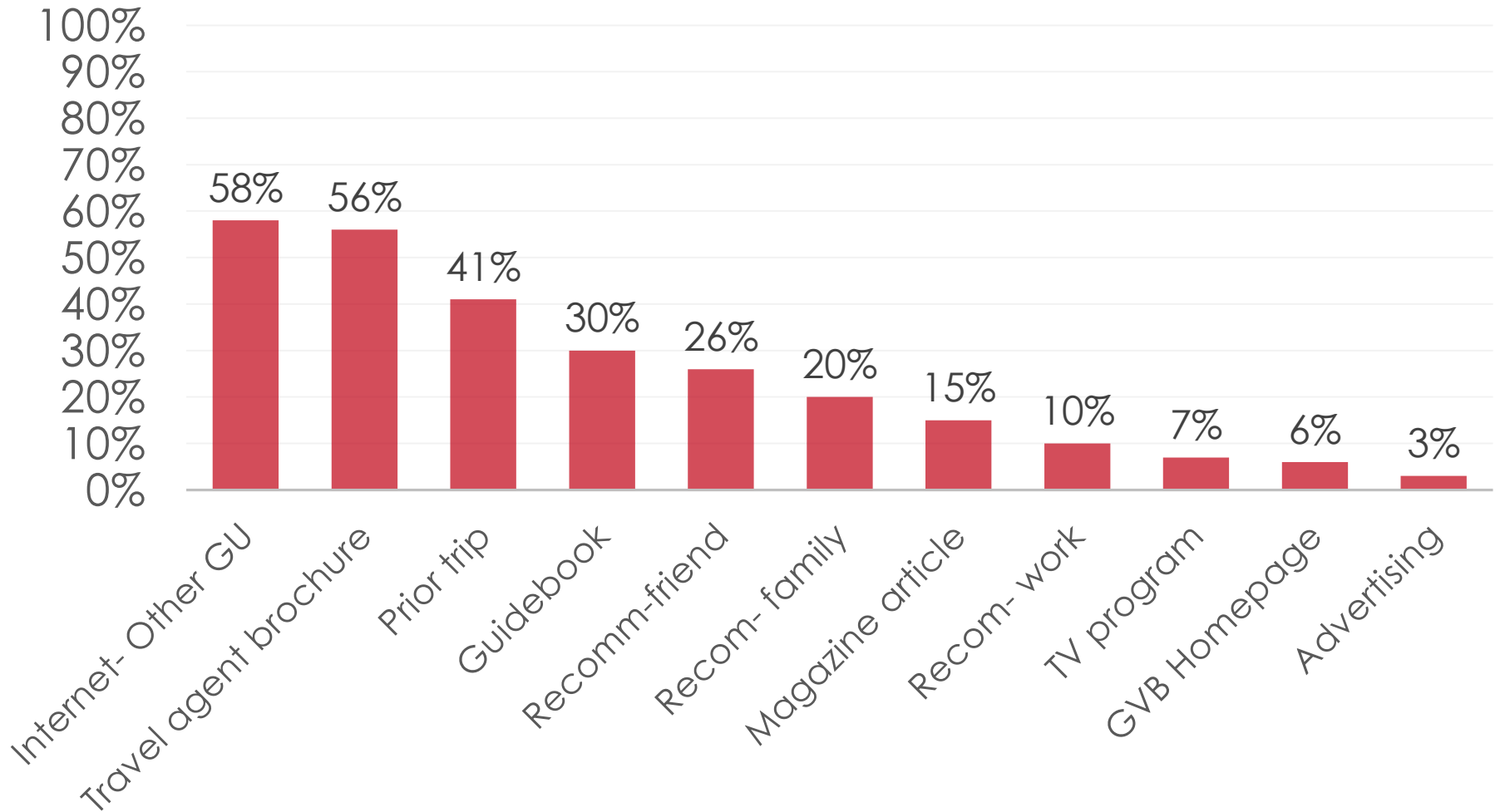
GVB EXIT SURVEY

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 | Guide books I brought with me | 70% | 74% | 68% | 73% | 67% | 50% | 75% | 60% |
| | Internet/Mobile App | 68% | 73% | 70% | 63% | | 100% | 83% | 60% |
| | Hotel staff | 43% | 44% | 42% | 46% | 33% | 50% | 42% | 46% |
| | Tour staff | 31% | 32% | 22% | 37% | | 50% | 50% | 34% |
| | Local publication | 15% | 16% | 18% | 7% | 33% | | 8% | 17% |
| | Local people | 11% | 4% | 11% | 8% | 67% | | | 19% |
| | Signs/ advertisement | 10% | 11% | 9% | 7% | 33% | | | 13% |
| | Retail staff | 7% | 2% | 6% | 8% | 33% | | | 11% |
| | Other visitors | 6% | 5% | 8% | 3% | | | | 2% |
| | Taxi drivers | 5% | 5% | 5% | 5% | | | 8% | 7% |
| | Restaurant staff (outside hotel) | 4% | 3% | 5% | 7% | | 50% | 8% | 3% |
| | Visitors channel | 3% | 3% | 3% | | | | | 2% |
| | Guam Visitors Bureau | 3% | 4% | 4% | 5% | | | | 6% |
| | Total | 349 | 167 | 179 | 59 | 3 | 2 | 12 | 89 |

SOURCES OF INFORMATION

TRIP INFLUENCERS



SOURCES OF INFORMATION

TRIP INFLUENCERS – KEY SEGMENTS

GVB EXIT SURVEY

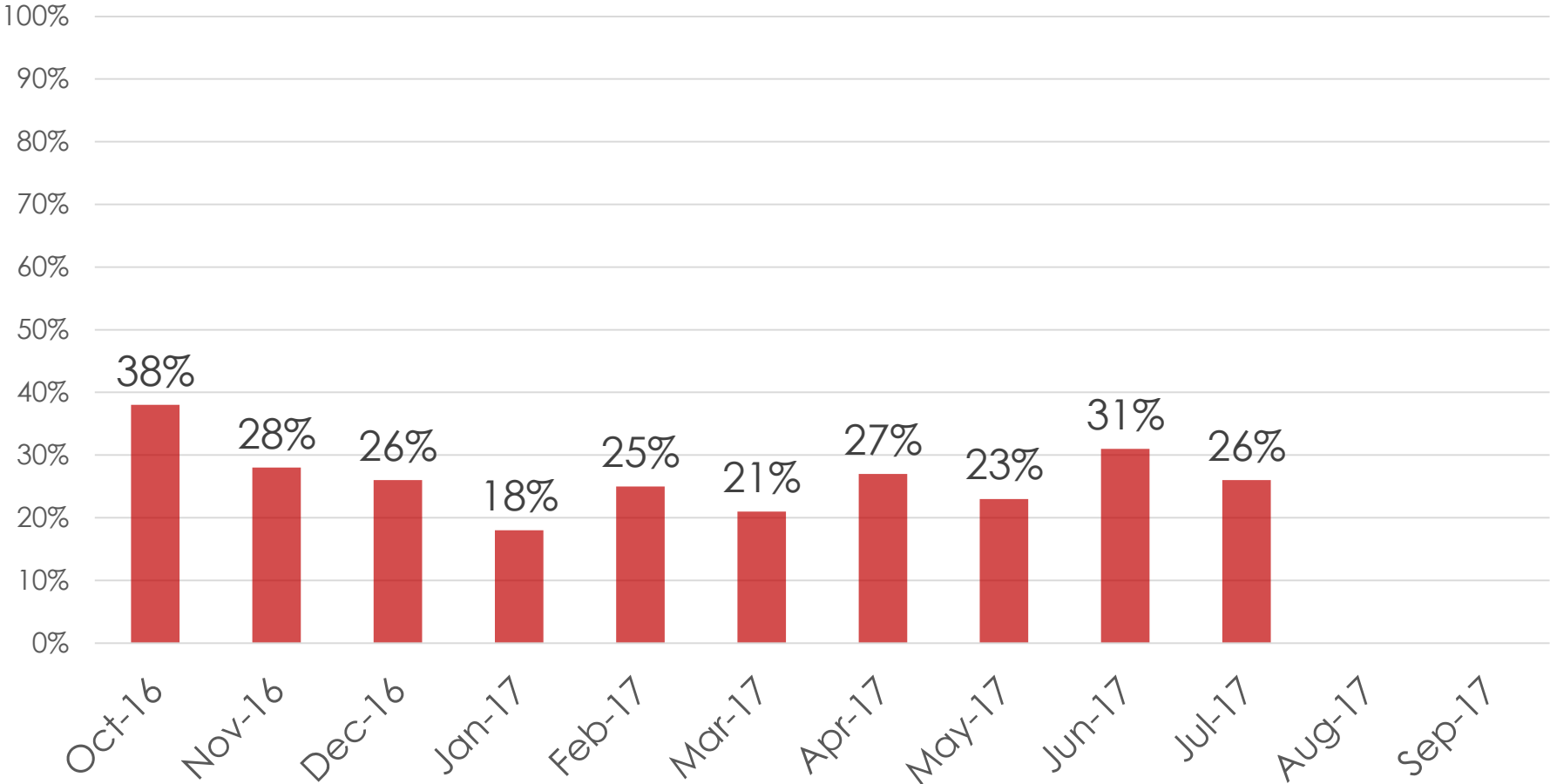
Q5C Please select the top three sources of information that motivated you to travel to Guam?

| | TOTAL | FAMILY | REPEAT VISITOR | OFFICE LADY | SILVERS | MICE | WEDDING | GROUP TOUR |
|--|-------|--------|----------------|-------------|---------|------|---------|------------|
| | - | - | - | - | - | - | - | - |
| Q5C Other Guam-related information on internet | 58% | 64% | 56% | 54% | | 50% | 50% | 52% |
| Travel agent brochure | 56% | 55% | 43% | 64% | 33% | 50% | 50% | 53% |
| I have been to Guam before | 41% | 43% | 79% | 39% | 100% | 50% | 25% | 38% |
| Travel Guide Book at bookstores | 30% | 32% | 23% | 25% | 33% | | 17% | 25% |
| Recommendation by friend | 26% | 15% | 17% | 31% | 33% | | 33% | 23% |
| Recommendation by family or relatives | 20% | 30% | 22% | 20% | 67% | | 75% | 26% |
| Magazine article | 15% | 14% | 9% | 14% | | 50% | 17% | 16% |
| Recommendation by co-worker | 10% | 7% | 5% | 3% | | 50% | | 16% |
| TV program | 7% | 8% | 9% | 8% | | | | 8% |
| GVB Japan Home Page | 6% | 7% | 4% | 2% | | 50% | 17% | 13% |
| Advertisement | 3% | 4% | 3% | 2% | 33% | | | 3% |
| Guam Visitors Bureau promotional activities | 2% | 2% | 3% | | | | | 2% |
| Guam Fiesta show | 1% | 2% | 1% | | | | | 2% |
| Newspaper article | 0% | | 1% | | | | | |
| Miss Guam promotion | 0% | | 1% | | | | | |
| Total | 349 | 167 | 179 | 59 | 3 | 2 | 12 | 88 |

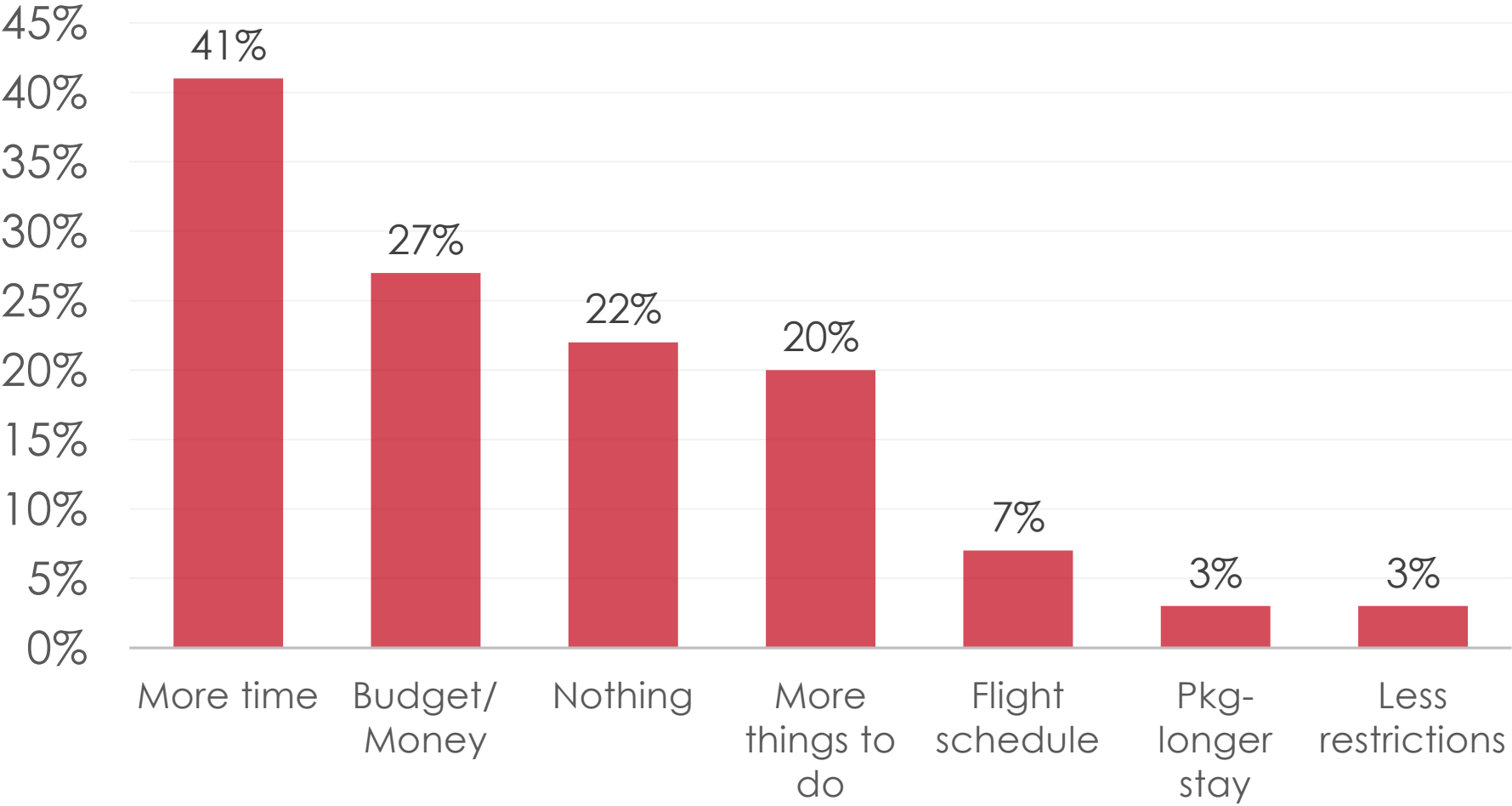
SECTION 6

FUTURE TRAVEL TO GUAM

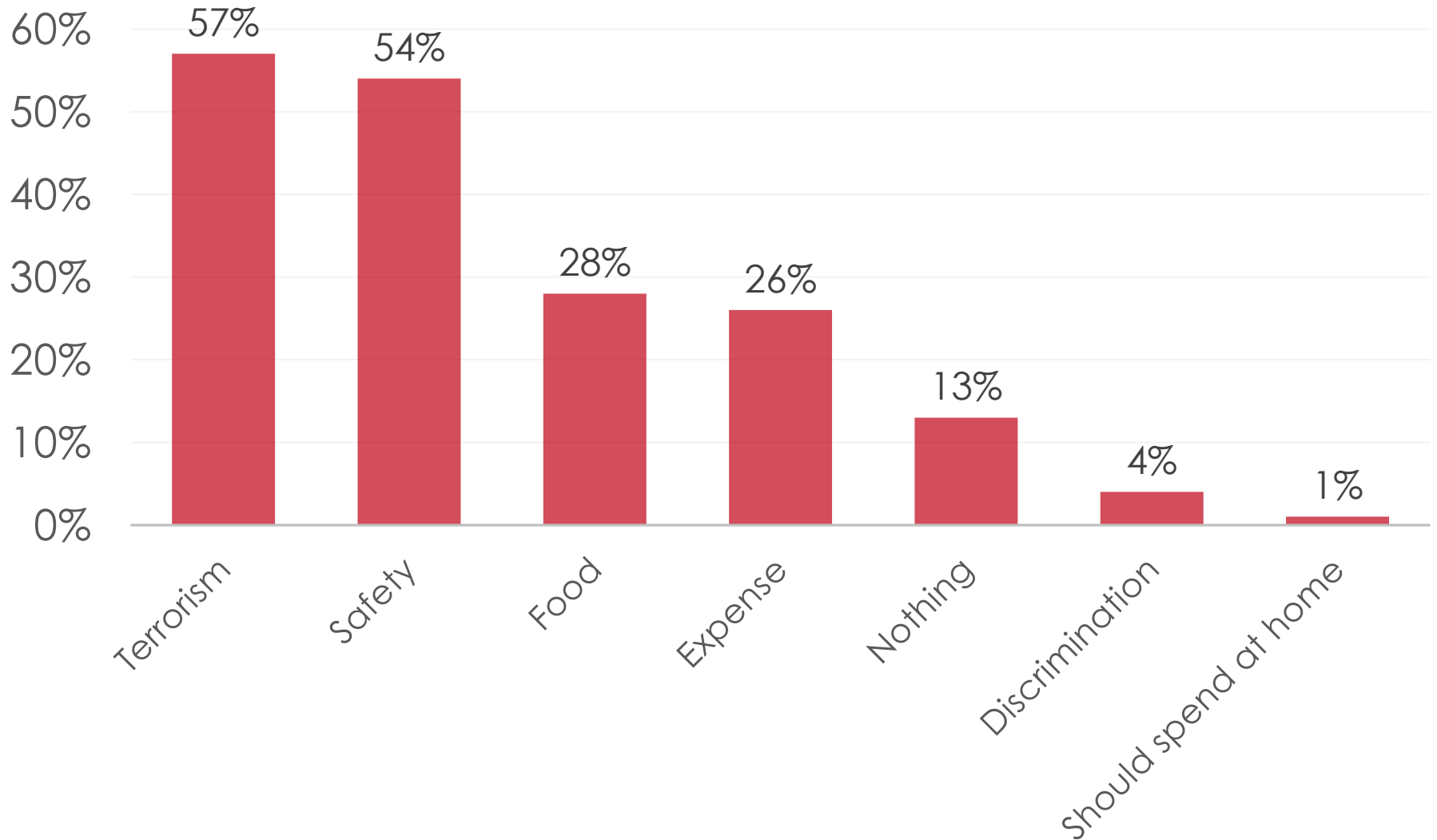
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



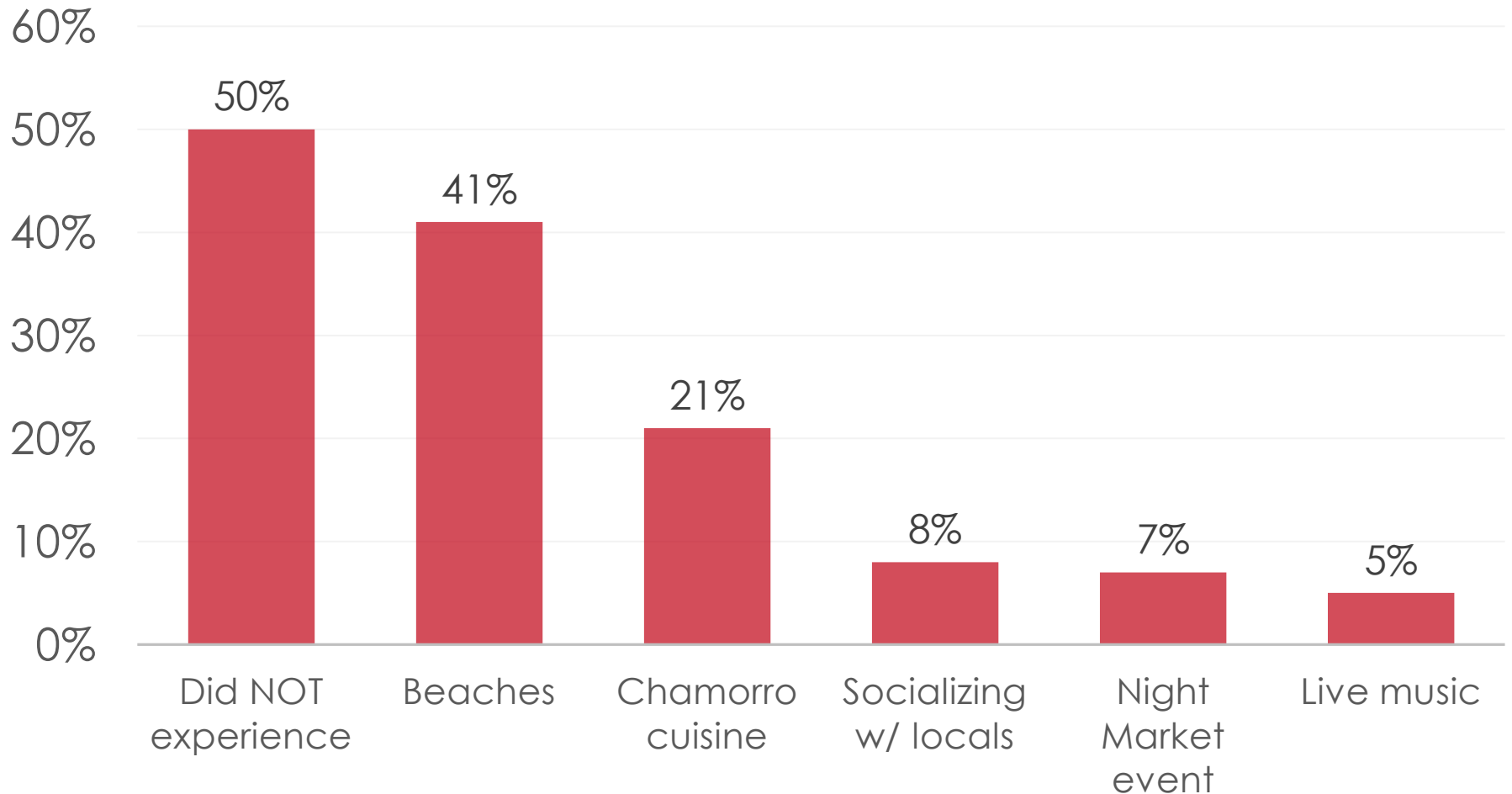
FUTURE TRAVEL CONCERNS



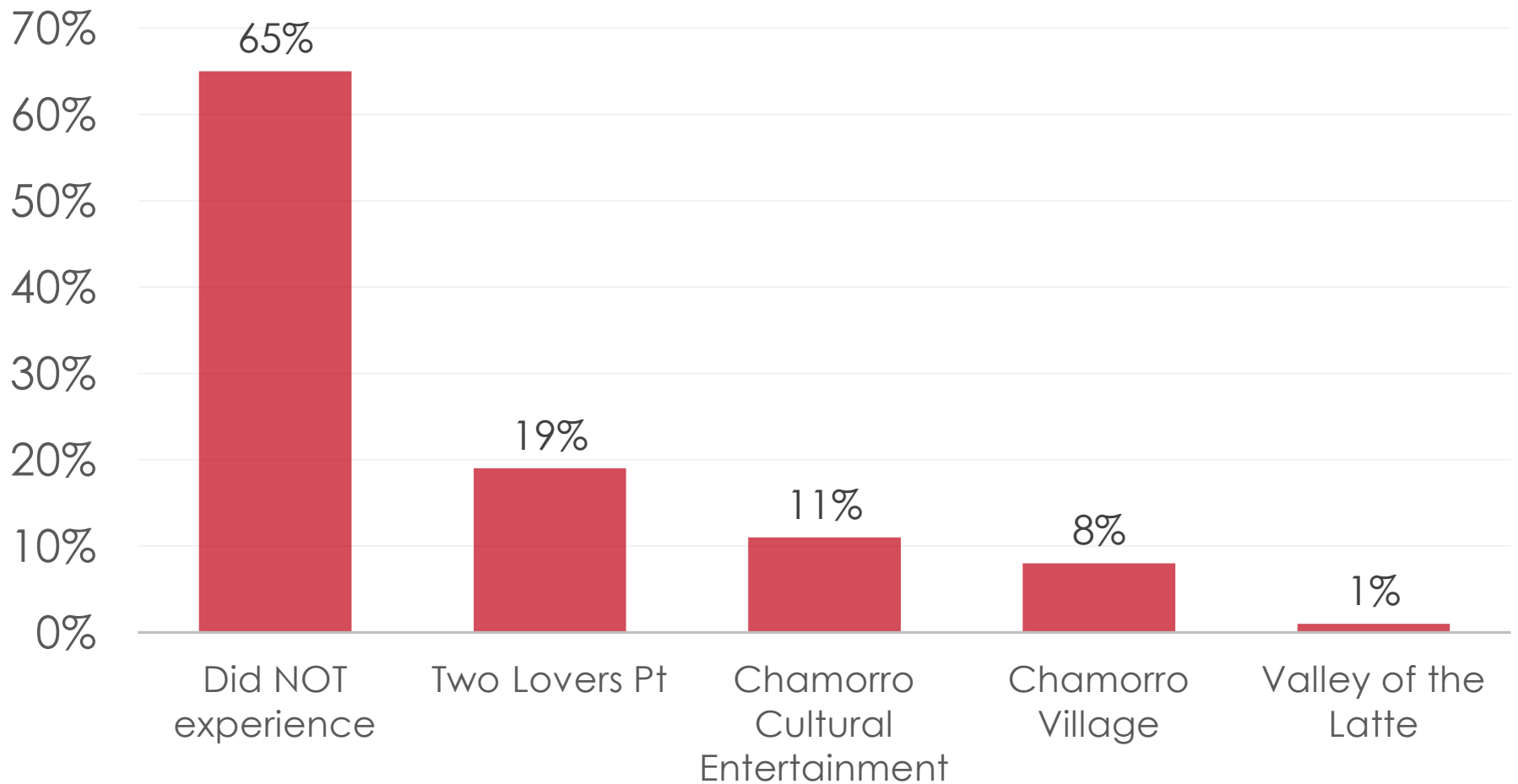
SECTION 7

GUAM CULTURE

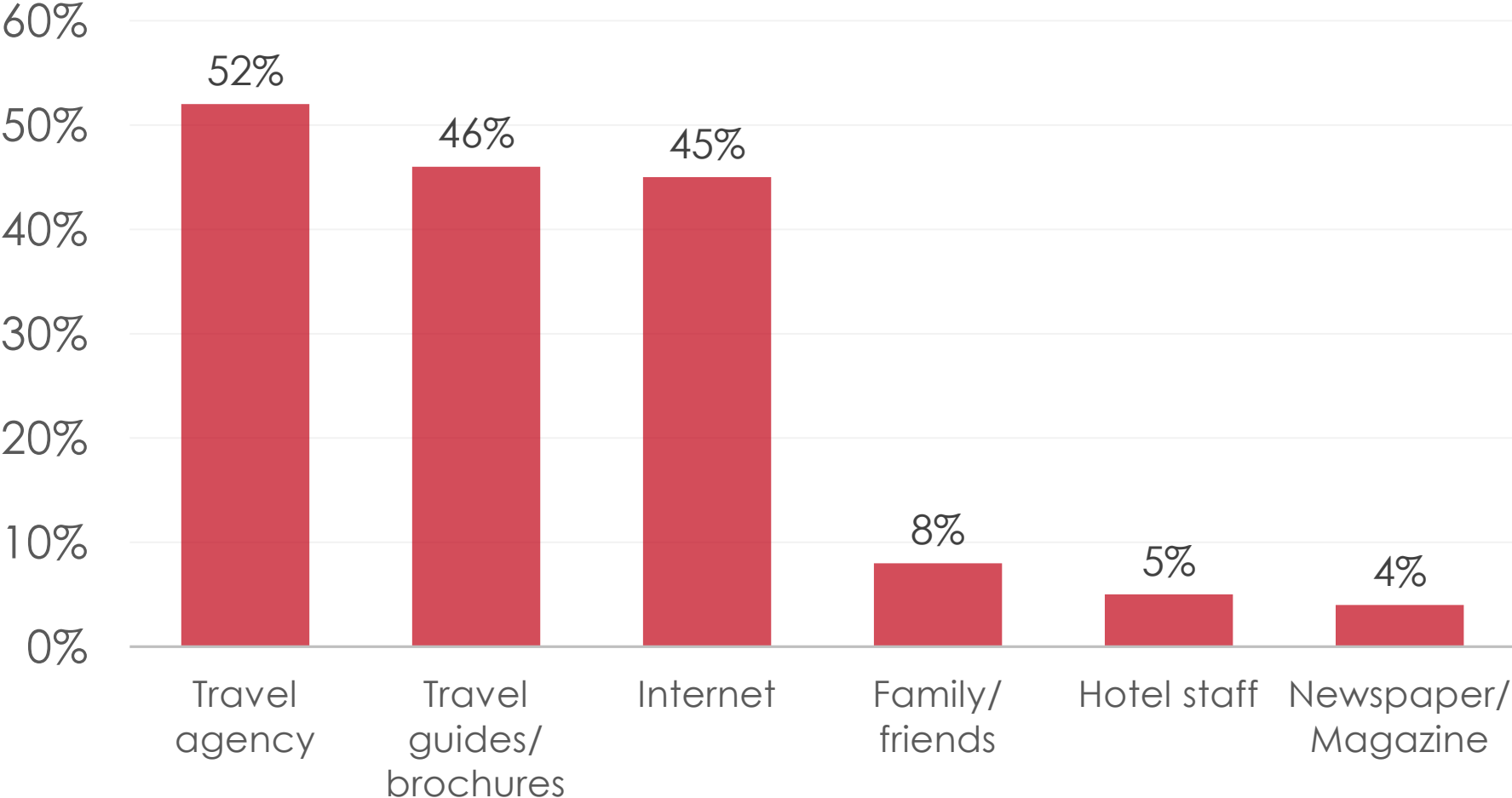
EXPERIENCED- CHAMORRO/ HAFA ADAI SPIRIT



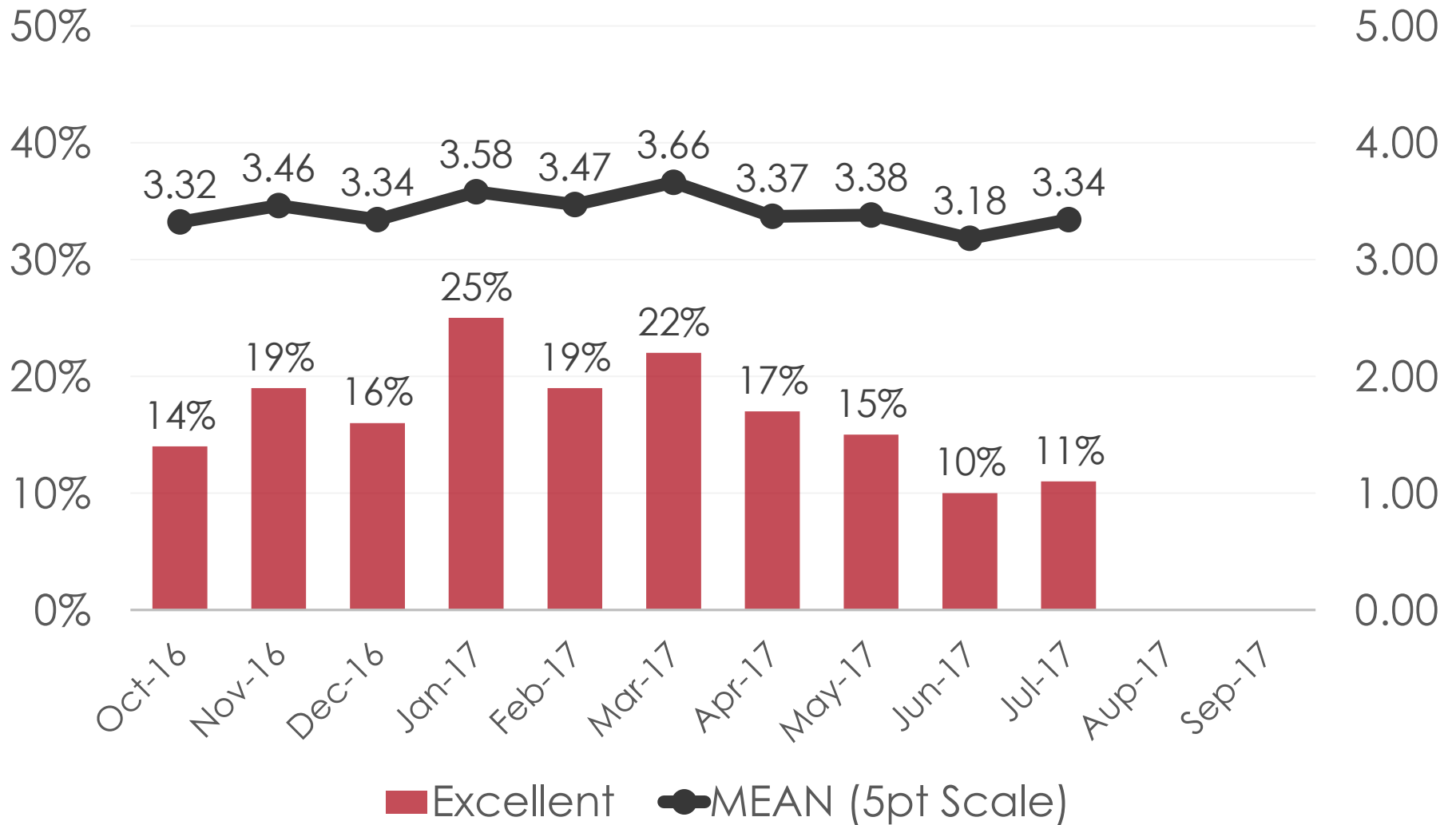
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



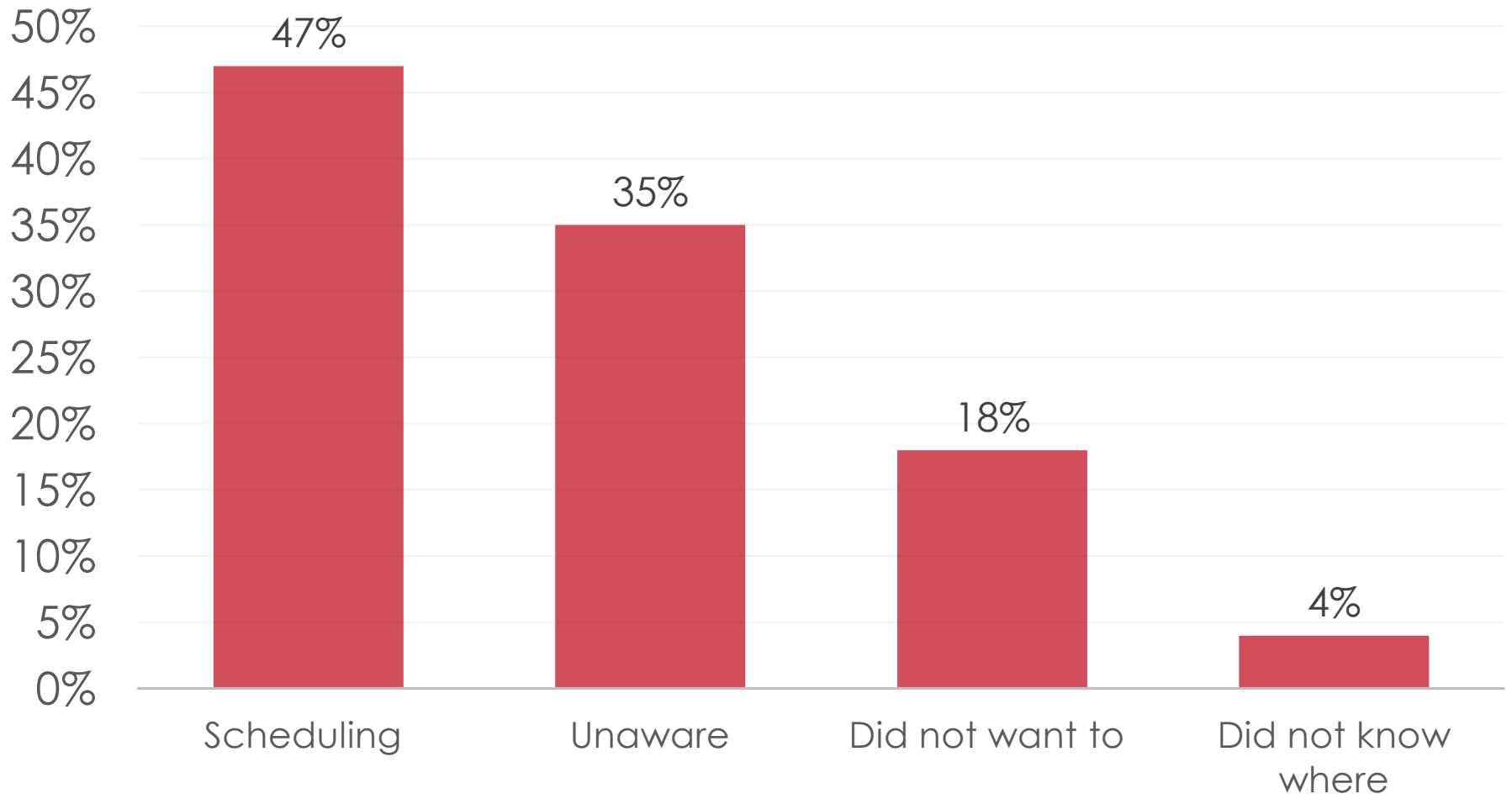
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



SECTION 7

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, Oct, Nov, Dec 2016, Jan, Feb, Mar, Apr, May, Jun, Jul 2017, and Overall Oct 2016 - July 2017 | | | | | | | | | | | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|---|
| Drivers: | Oct-16 rank | Nov-16 rank | Dec-16 rank | Jan-17 rank | Feb-17 rank | Mar-17 rank | Apr-17 rank | May-17 rank | Jun-17 rank | Jul-17 rank | Combined Oct 2016 - Jul 2017 rank |
| Quality & Cleanliness of beaches & parks | | 4 | 5 | | | 1 | 2 | | 4 | 3 | 4 |
| Ease of getting around | | | | | | | | 3 | | | 9 |
| Safety walking around at night | | | | | | | | | | 5 | |
| Quality of daytime tours | | | 4 | | 4 | | | | | | 6 |
| Variety of daytime tours | | | | | | | | | | | |
| Quality of nighttime tours | | | | | | | | | | | 8 |
| Variety of nighttime tours | | | | | | | | | | | |
| Quality of shopping | 2 | | 2 | 3 | | | 3 | 2 | | | |
| Variety of shopping | | 6 | | | 3 | 2 | | | 2 | 4 | 3 |
| Price of things on Guam | | | | | | | | | | | |
| Quality of hotel accommodations | 3 | 3 | | 4 | 5 | 3 | | | 5 | 2 | 2 |
| Quality/cleanliness of air, sky | | 5 | 3 | | | | 4 | | | | 11 |
| Quality/cleanliness of parks | | | | | | | | | | | 12 |
| Quality of landscape in Tumon | | 2 | | | 2 | | | 1 | 1 | | 7 |
| Quality of landscape in Guam | | | 1 | 1 | | 4 | 1 | | 6 | 1 | 10 |
| Quality of ground handler | 1 | 1 | | | | | | | 3 | | 1 |
| Quality/cleanliness of transportation vehicles | 4 | | | 2 | 1 | | | | | | 5 |
| % of Overall Satisfaction Accounted For | 64.7% | 55.2% | 43.2% | 41.1% | 43.4% | 50.1% | 59.7% | 42.0% | 57.4% | 58.4% | 51.8% |

NOTE: Only significant drivers are included.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japan visitor's experience on Guam is driven by five significant factors in the July 2017 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks,**
 - **Variety of shopping, and**
 - **Safety walking around at night.**
- With all five factors the overall r^2 is .584 meaning that **58.4% of overall satisfaction is accounted for by these factors.**

Drivers – On-Isle Expenditures

| Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2016, Jan, Feb, Mar, Apr, May, Jun, Jul 2017 and Overall Oct 2016-Jul 2017 | | | | | | | | | | | |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------------|----------------------------|
| | Oct-16 | Nov-16 | Dec-16 | Jan-17 | Feb-17 | Mar-17 | Apr-17 | May-17 | Jun-17 | Jul-17 | Combined Oct 2016-Jul 2017 |
| Drivers: | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank | rank |
| Quality & Cleanliness of beaches & parks | | | | 1 | | | | | | | |
| Ease of getting around | | | | 3 | | | | | | | |
| Safety walking around at night | | | | | | | | | | | |
| Quality of daytime tours | | | | | | | | | | | |
| Variety of daytime tours | | | | 4 | | | | | | | |
| Quality of nighttime tours | | | | | | | 1 | | | | |
| Variety of nighttime tours | | | | | | | | | | | |
| Quality of shopping | 1 | | | | | | | | | | 1 |
| Variety of shopping | | | | | | | | | | | |
| Price of things on Guam | | 1 | | | | | | | | | |
| Quality of hotel accommodations | | | | | 2 | | | | | | |
| Quality/cleanliness of air, sky | | | | | | | | | | | |
| Quality/cleanliness of parks | | | | | | | | | | | |
| Quality of landscape in Tumon | | | | 2 | | | | | | | |
| Quality of landscape in Guam | | | | | | | | | | | |
| Quality of ground handler | | | | 5 | | | | | | | |
| Quality/cleanliness of transportation vehicles | | | | | 1 | | | | | | |
| % of Per Person On Island Expenditures Accounted For | 2.7% | 1.8% | 0.0% | 10.0% | 5.6% | 0.0% | 4.4% | 0.0% | 0.0% | 0.0% | 0.5% |

NOTE: Only significant drivers are included.

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japan visitors on Guam is driven by no significant factor in the July 2017 period.