



Guam Visitors Bureau

Taiwan In-Market Insight Report

MAY 2022

[ANTHOLOGY®]
RESEARCH



Background & Objectives

- In light of the covid-19 pandemic and its abrupt and severe impacts on visitor arrivals on Guam, Guam Visitors Bureau contracted Anthology Research to gather feedback from residents likely to travel in the near future from key source markets, in order to achieve the following objectives.
 - Inform strategies to drive demand for Guam as a destination for travel from the source market covered by the study: Taiwan.
 - Better understand motivations to travel internationally.
 - Gauge perceptions of and satisfaction with Guam as a destination.
- Anthology and Guam Visitors Bureau research staff collaboratively developed the questionnaire, which was translated into Traditional Chinese.



Methodology

- Anthology Research conducted a self-administered online survey of residents of Taiwan, utilizing sample provided by a reputable online sample provider. All surveys were presented in Traditional Chinese, with the option to view the survey in English. Participants were screened to include only those residents who have traveled internationally, for any reason, in the last three years (since the start of 2019) or intend to travel internationally for any reason in the next five years.
- This report includes results from the survey, conducted April 21-27, 2022. A total of n=354 surveys were collected during this period.
- The margin of error for a sample of n=354 is +/- 5.21 percentage points with a 95% confidence level. That is, if all Taiwan residents in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.21 percentage points.



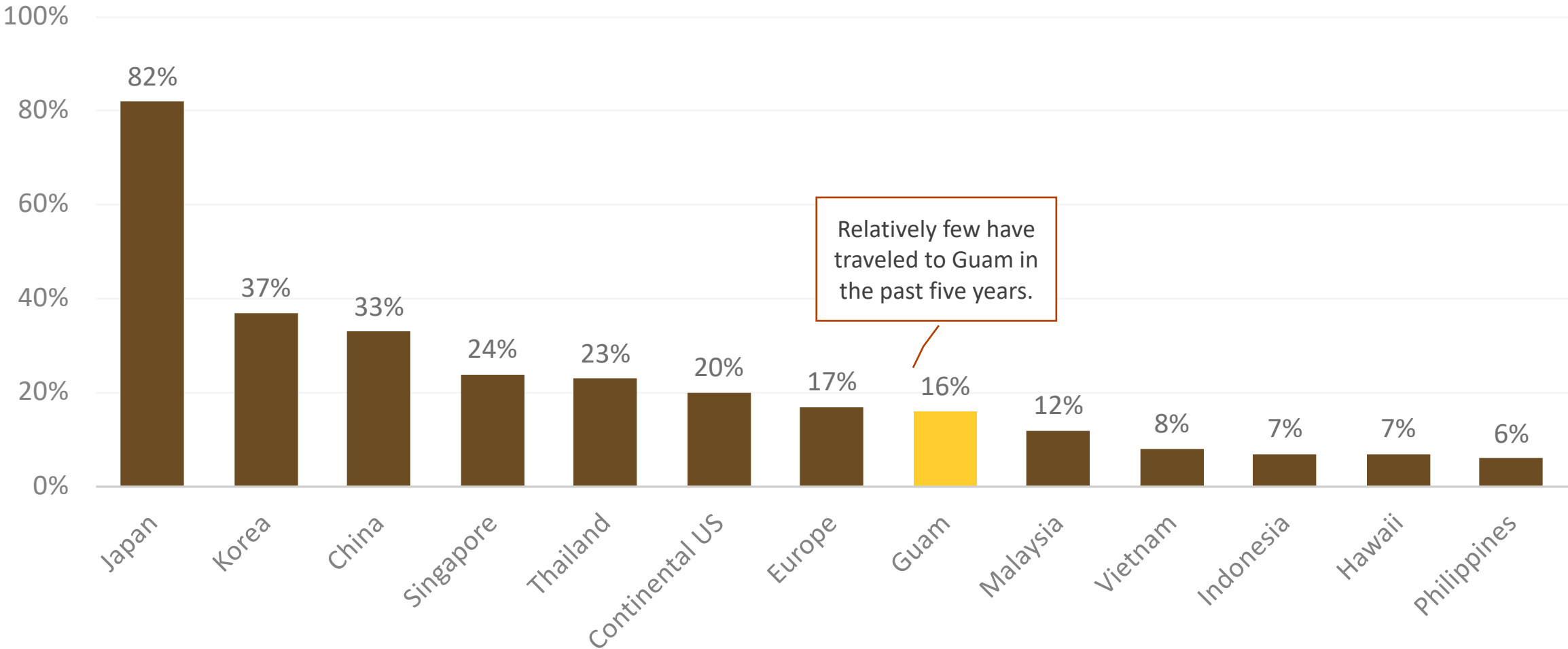


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



TRAVEL HISTORY

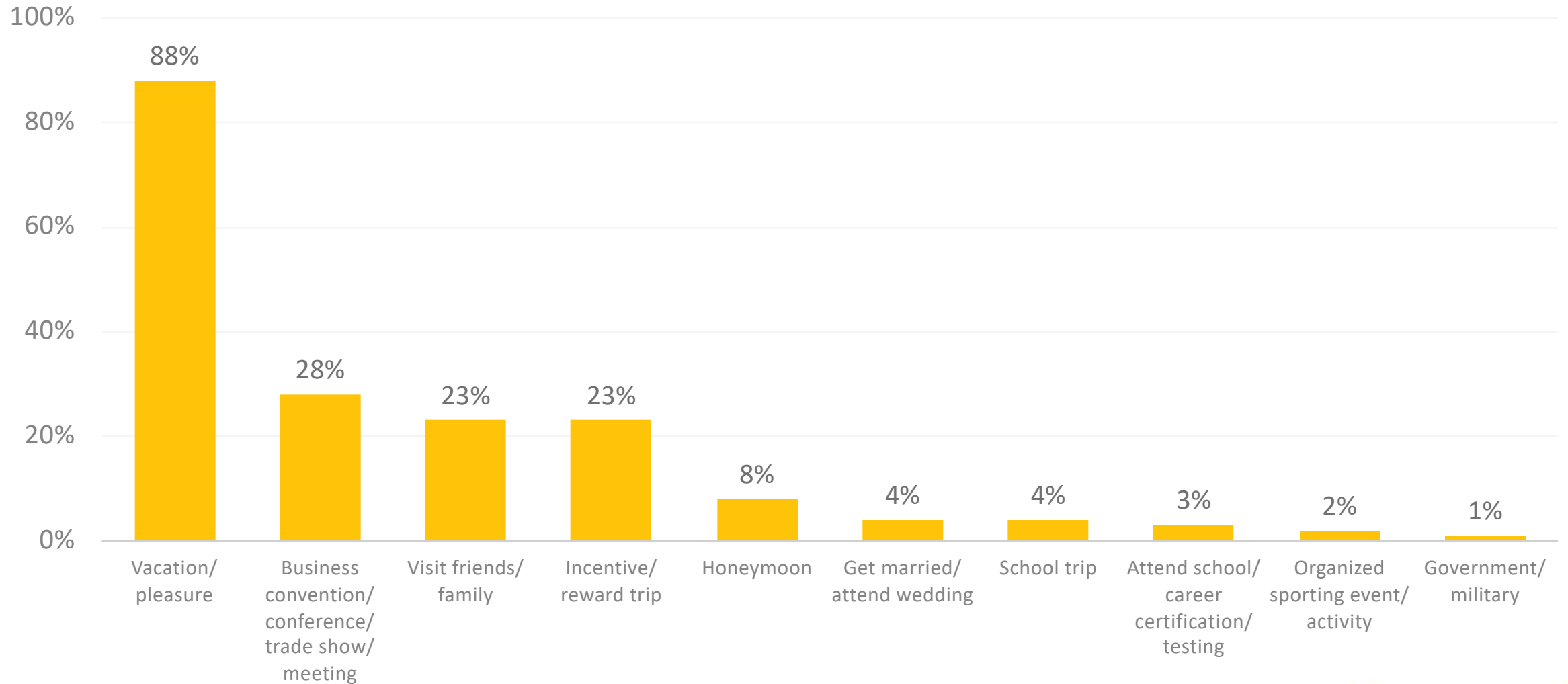
| | May 2021 | June 2021 | Sept 2021 | May 2022* |
|------------------|----------|-----------|-----------|-----------|
| Japan | 74% | 73% | 73% | 82% |
| China | 37% | 39% | 29% | 33% |
| Korea | 29% | 29% | 27% | 37% |
| Singapore | 23% | 25% | 19% | 24% |
| Thailand | 26% | 21% | 17% | 23% |
| Europe | 15% | 17% | 14% | 17% |
| Malaysia | 15% | 16% | 11% | 12% |
| Continental U.S. | 17% | 14% | 14% | 20% |
| Vietnam | 12% | 11% | 5% | 8% |
| Guam | 10% | 7% | 11% | 16% |
| Indonesia | 8% | 8% | 5% | 7% |
| Hawaii | 8% | 6% | 7% | 7% |

Q: To what international destinations have you traveled, for any reason, in the last five years?

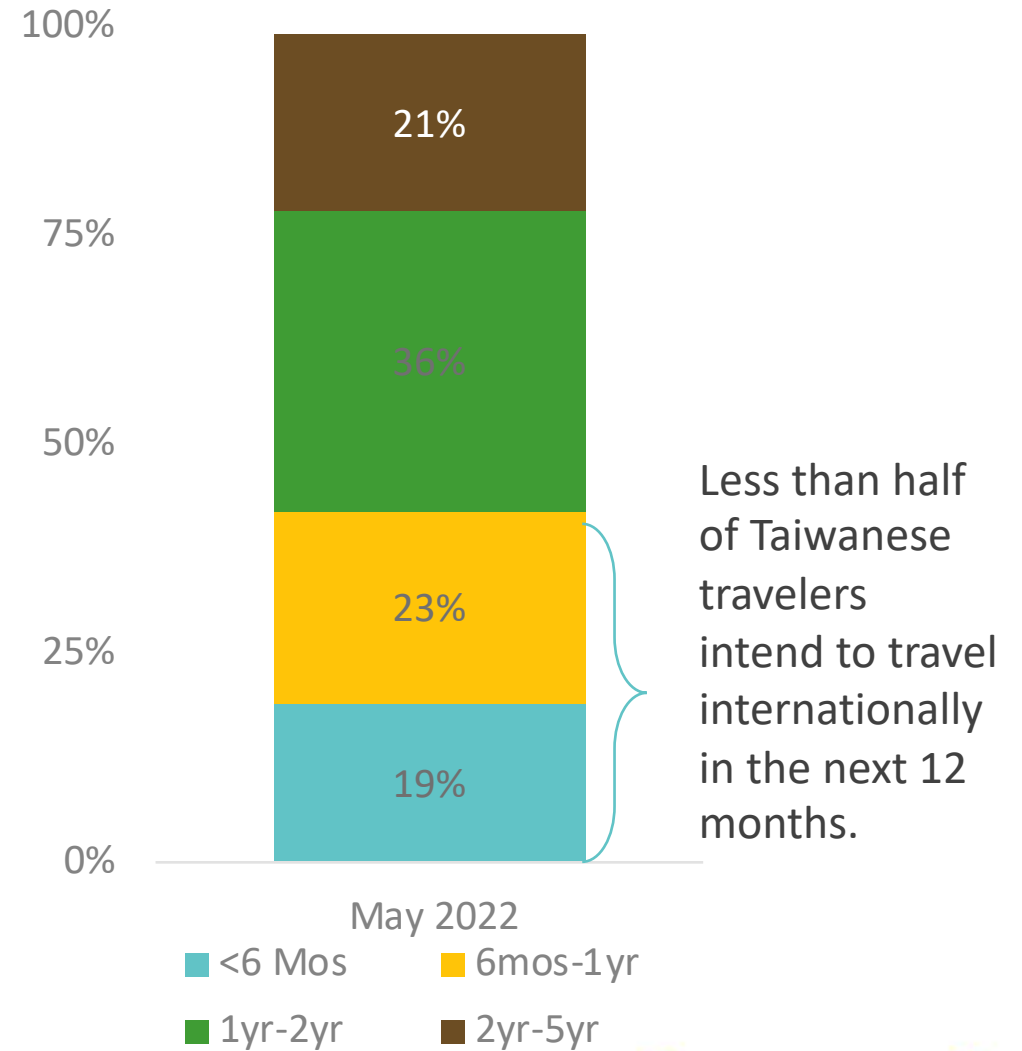
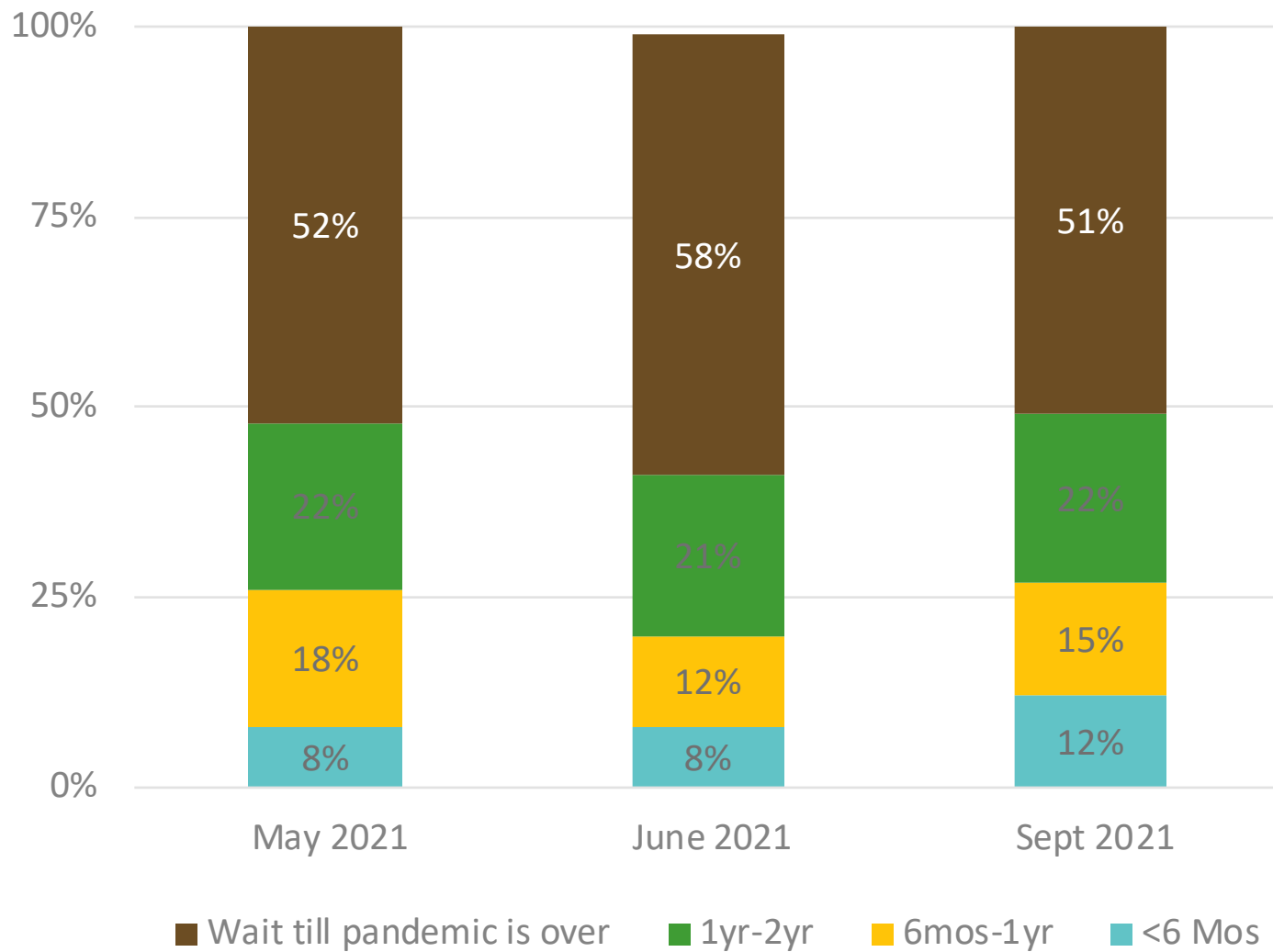
*Note: Question updated in May 2022 to clarify travel for any reason.



PRIMARY TRAVEL MOTIVATION



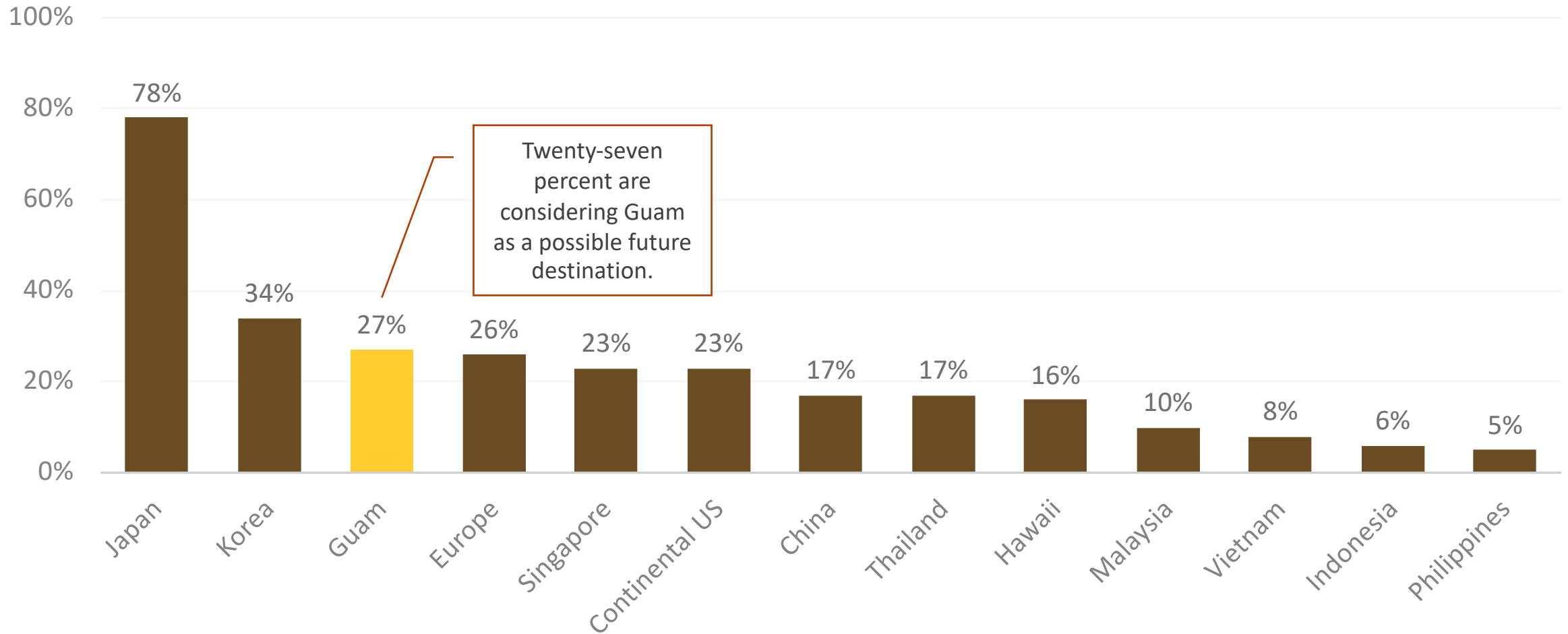
FUTURE TRAVEL PLANS



2021 Survey Q: When, if at all, do you intend to take an international trip for vacation purposes outside of Taiwan?
 2022 Survey Q: When, if at all, do you intend to take an international trip outside of Taiwan, for any reason?



POTENTIAL FUTURE TRAVEL DESTINATIONS

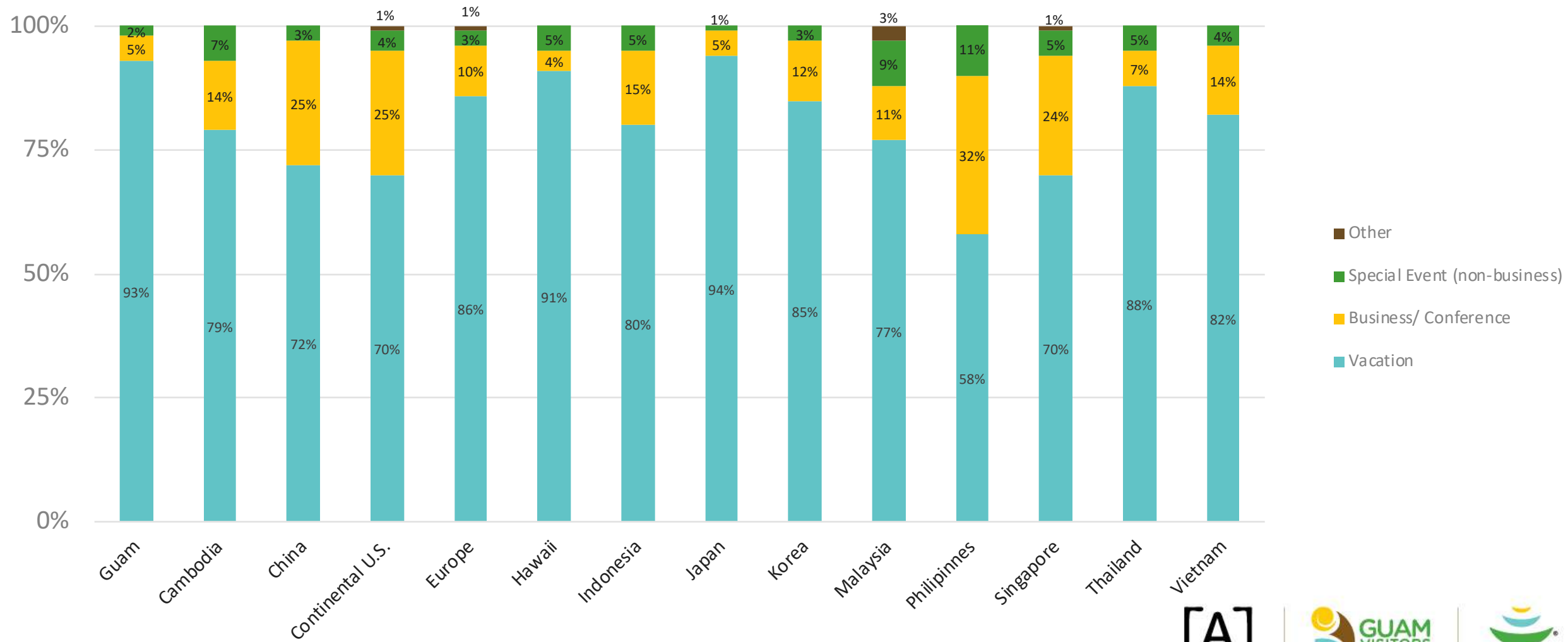


POTENTIAL FUTURE TRAVEL DESTINATIONS

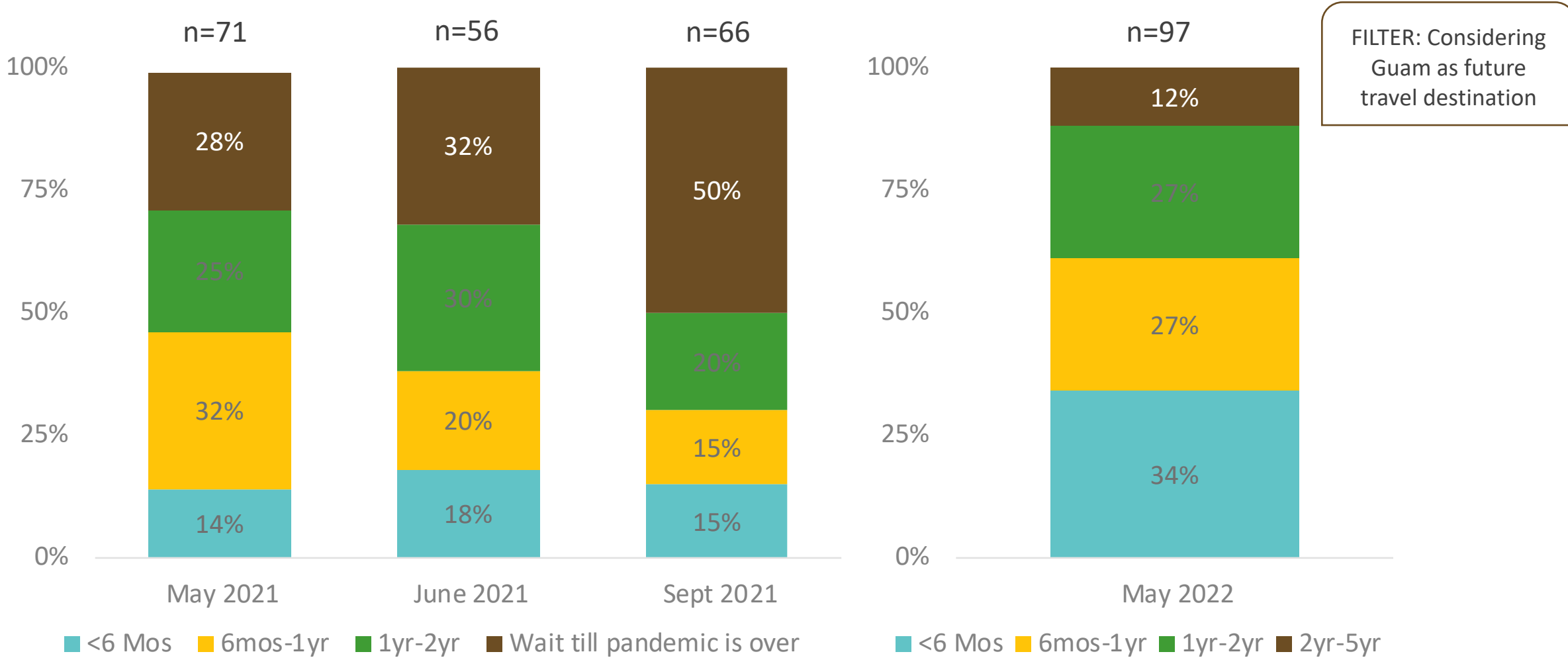
| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|------------------|----------|-----------|-----------|----------|
| Japan | 71% | 70% | 71% | 78% |
| Korea | 23% | 25% | 25% | 34% |
| Guam | 23% | 18% | 22% | 27% |
| Europe | 17% | 22% | 21% | 26% |
| Singapore | 18% | 19% | 19% | 23% |
| Continental U.S. | 14% | 13% | 16% | 23% |
| Thailand | 17% | 15% | 13% | 17% |
| China | 21% | 22% | 13% | 17% |
| Hawaii | 12% | 14% | 11% | 16% |
| Malaysia | 11% | 9% | 9% | 10% |
| Vietnam | 8% | 9% | 5% | 8% |

- Travelers from Taiwan considering Guam as an international destination statistically more likely to also be considering nearly all other destinations, except for Japan and China.

PURPOSE OF INTERNATIONAL TRAVEL



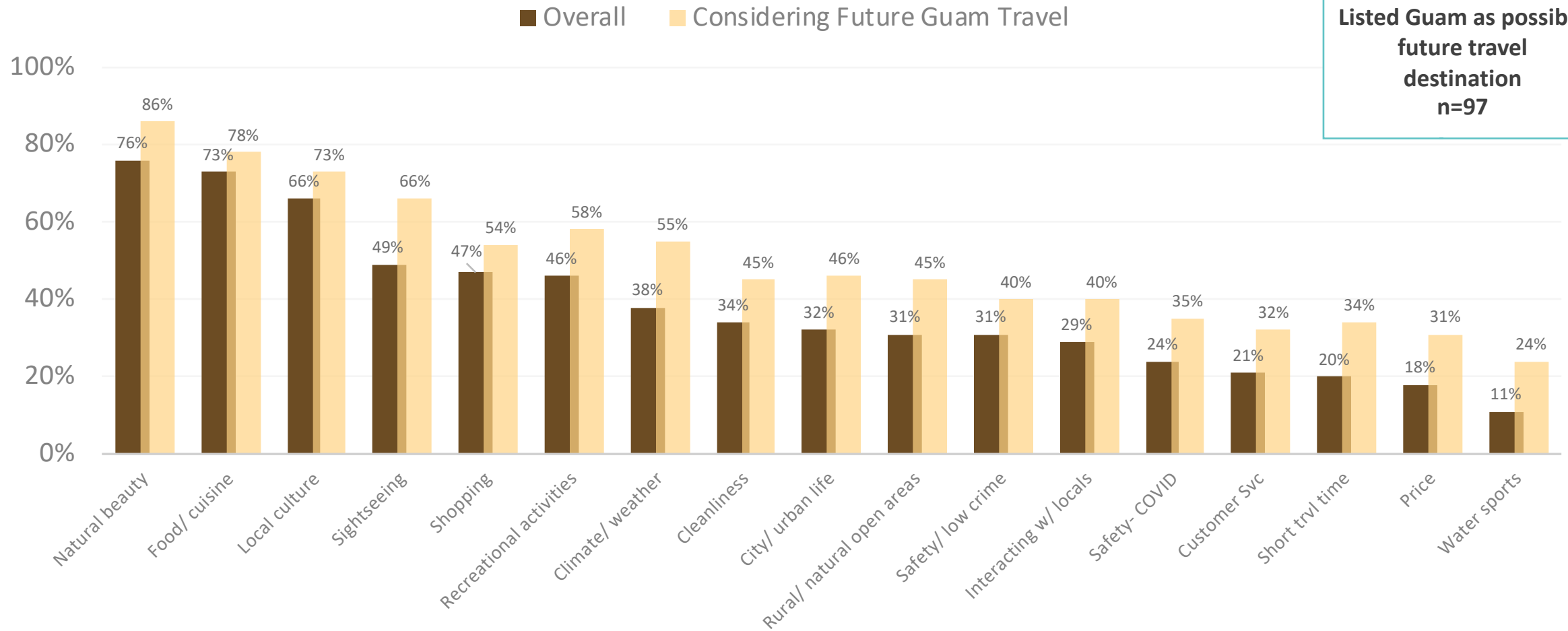
TIMING OF FUTURE TRAVEL TO GUAM



2021 Survey Q: When, if at all, do you intend to take an international trip for vacation purposes outside of Japan?
 2022 Survey Q: When, if at all, do you intend to take an international trip outside of Japan, for any reason?



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

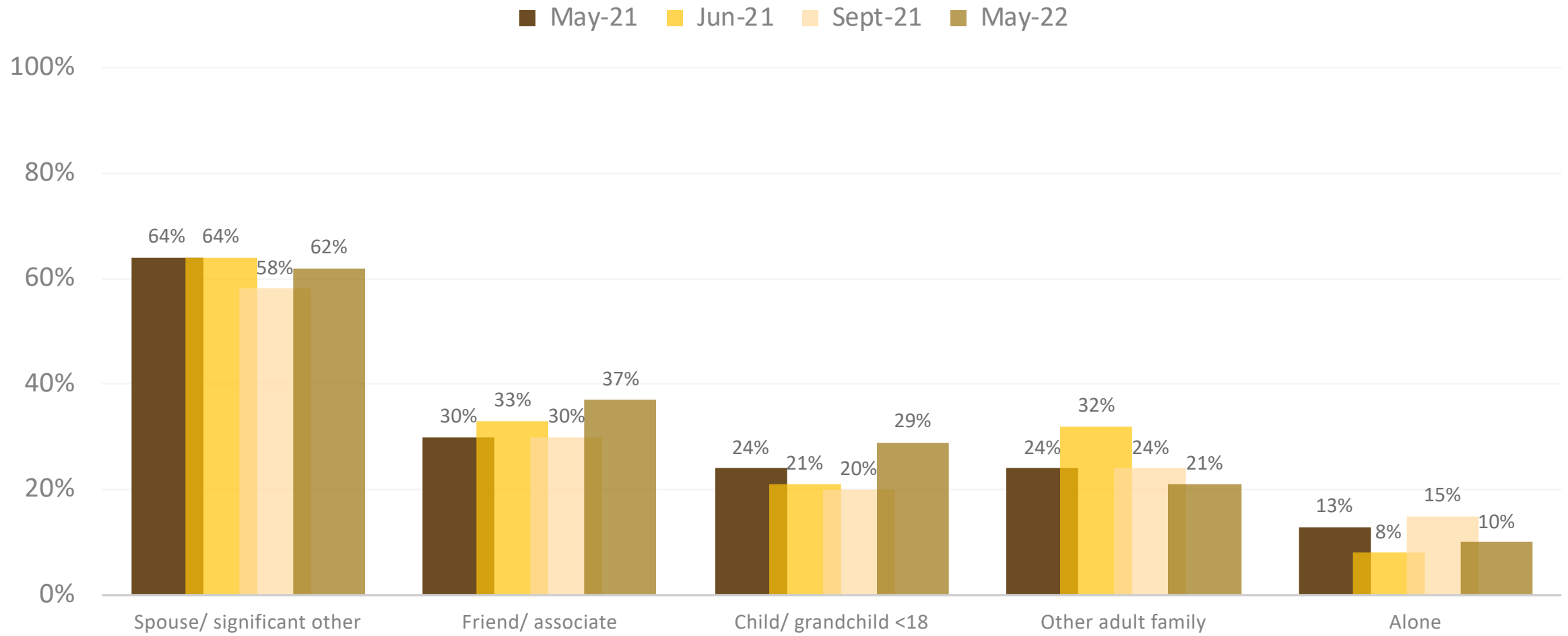
| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|-----------------------------|----------|-----------|-----------|----------|
| Natural beauty | 71% | 72% | 67% | 76% |
| Food/ cuisine | 61% | 63% | 57% | 73% ↑ |
| Local culture | 55% | 57% | 54% | 66% ↑ |
| Sightseeing/ tourist spots | 47% | 52% | 42% | 49% |
| Shopping | 44% | 44% | 36% | 47% ↑ |
| Recreational activities | 32% | 32% | 28% | 46% ↑ |
| Climate/ weather | 26% | 25% | 25% | 38% ↑ |
| Cleanliness | 28% | 25% | 21% | 34% ↑ |
| City/ urban life | 20% | 22% | 21% | 32% ↑ |
| Rural/ open spaces | 27% | 31% | 23% | 31% |
| Safety/ low crime | 21% | 23% | 20% | 31% ↑ |
| Interacting w/ locals | 25% | 22% | 22% | 29% |
| Safety- COVID | 17% | 22% | 15% | 24% ↑ |
| Quality of customer service | 18% | 14% | 17% | 21% |
| Short travel distance | 20% | 22% | 17% | 20% |
| Price | 15% | 15% | 11% | 18% |
| Water sports | 12% | 9% | 11% | 11% |
| Sports events | 5% | 5% | 4% | 9% ↑ |
| Medical treatment/ services | 4% | 4% | 5% | 8% |
| Business/ conference | - | - | - | 9% |

↑ Indicates statistically significant increase from Sept 2021.

Q: What is appealing about those places?



FUTURE INTERNATIONAL TRAVEL PARTY



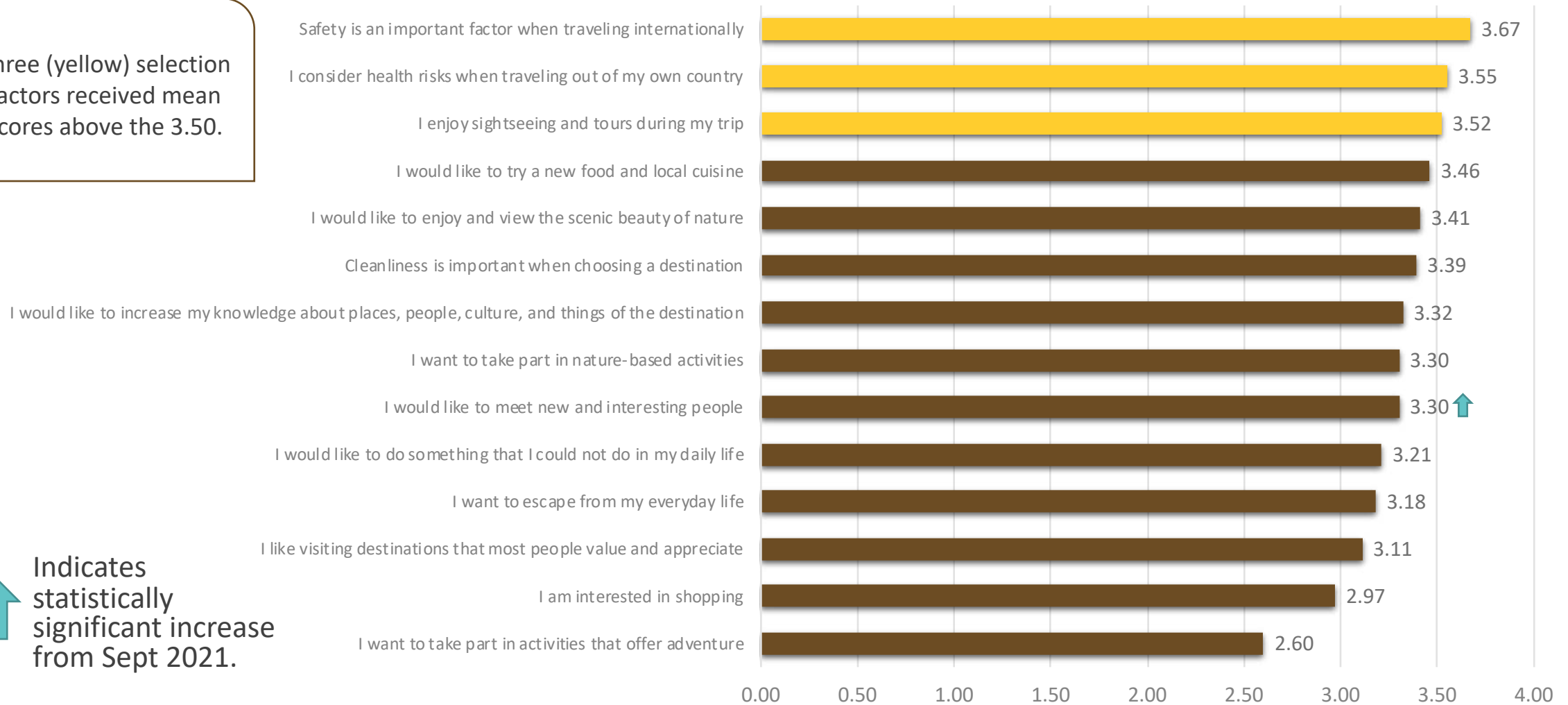
Q: Thinking of your travel plans post COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

MEAN SCORE 4PT SCALE

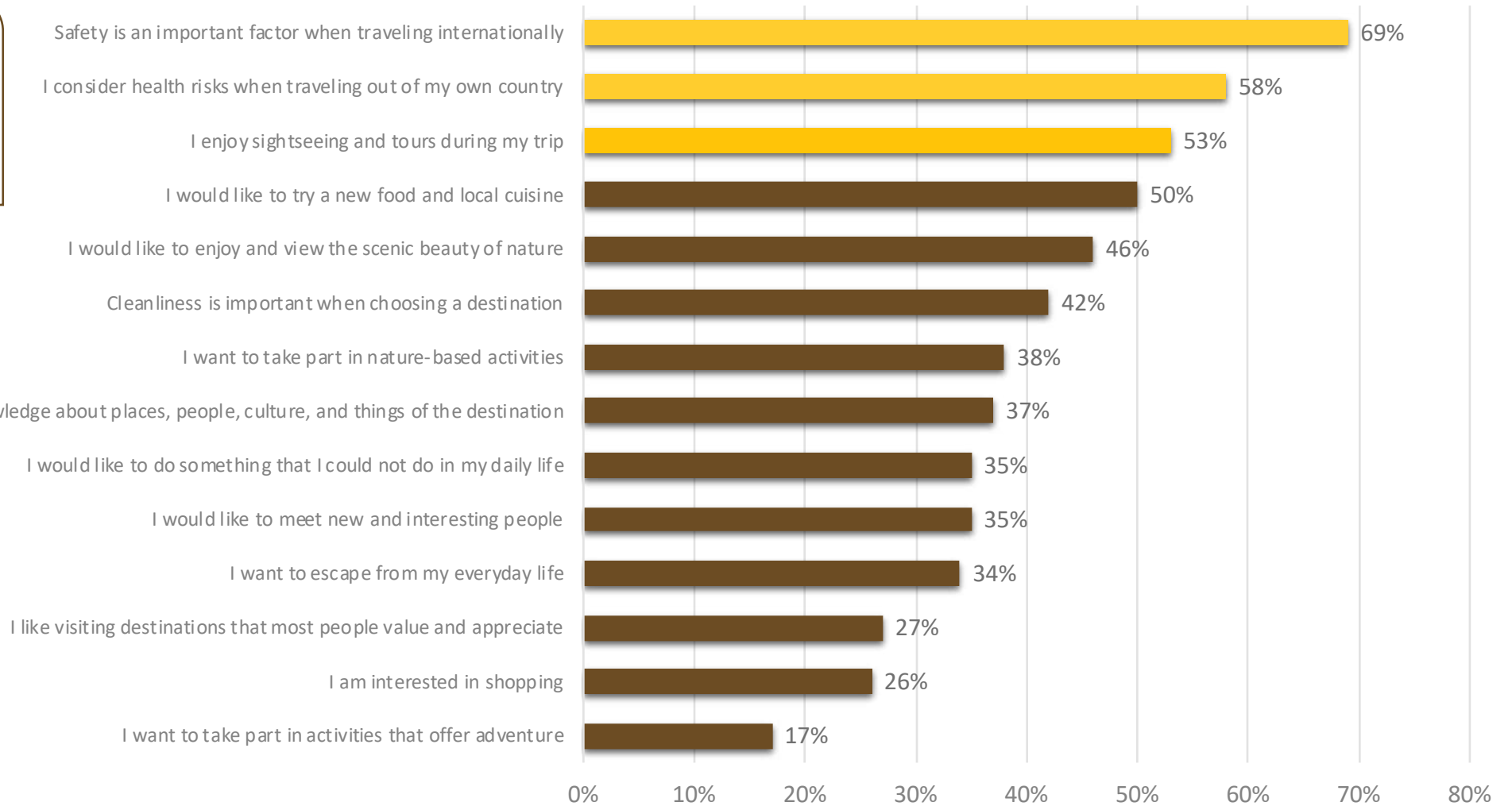
Three (yellow) selection factors received mean scores above the 3.50.



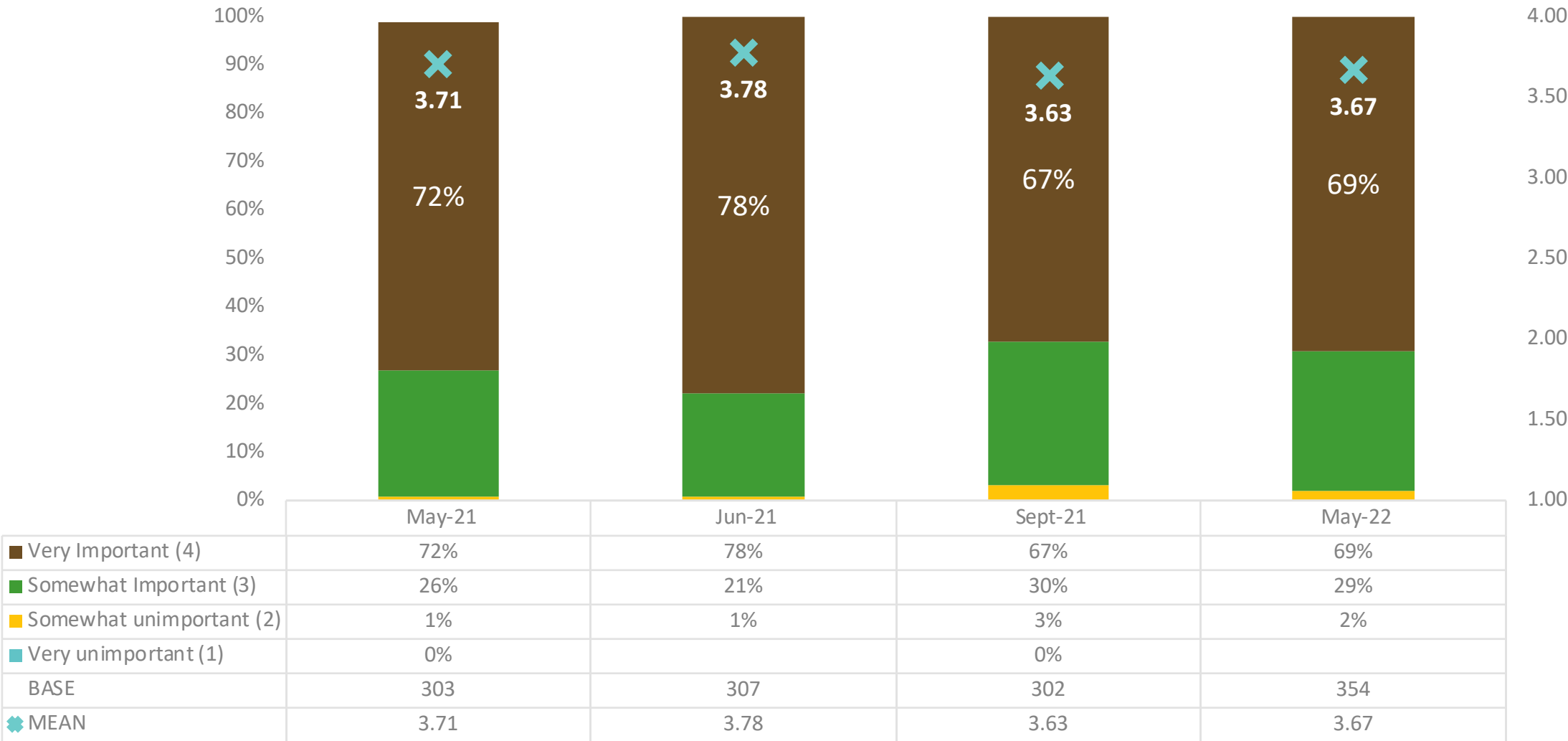
↑ Indicates statistically significant increase from Sept 2021.

DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

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



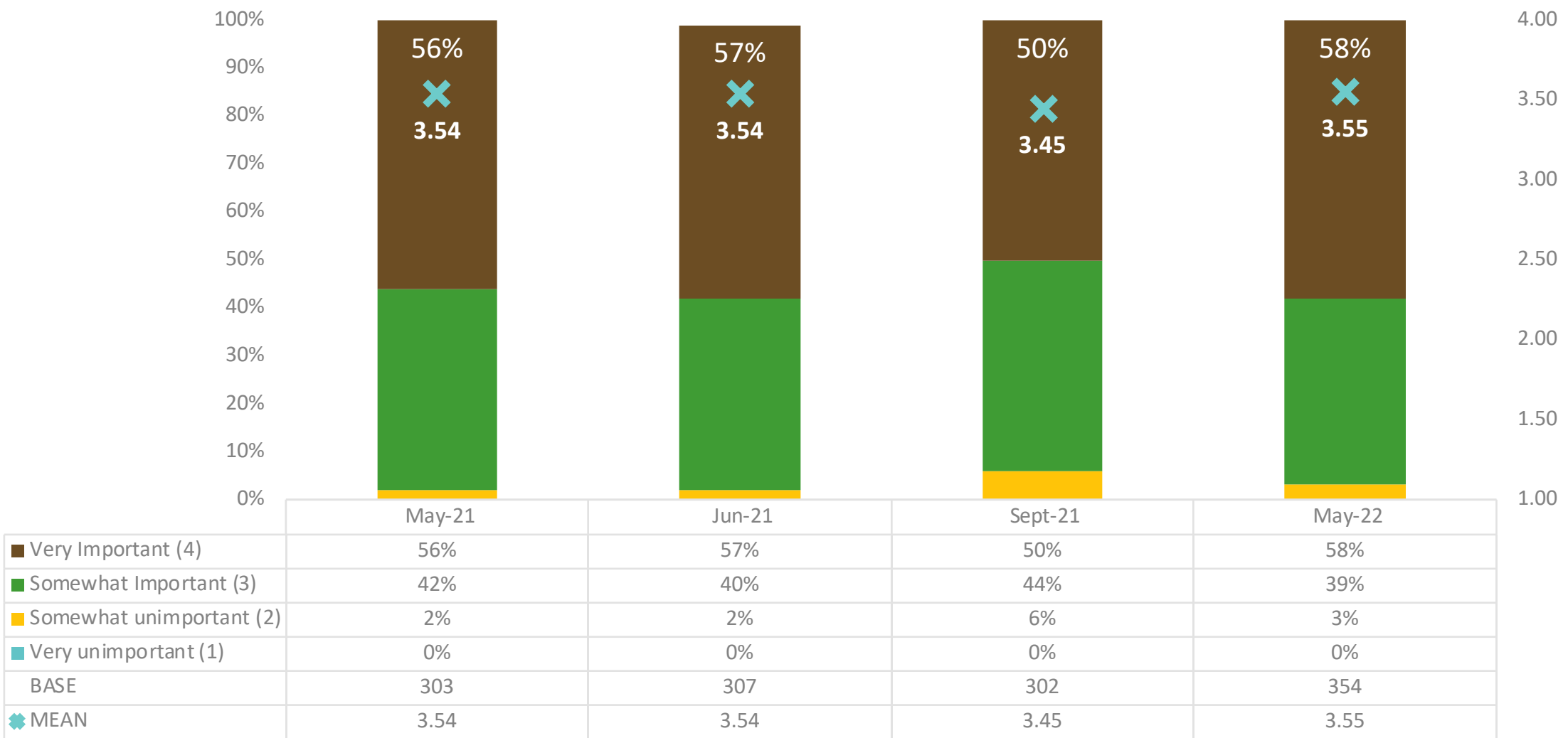
Safety is an important factor when traveling internationally



Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



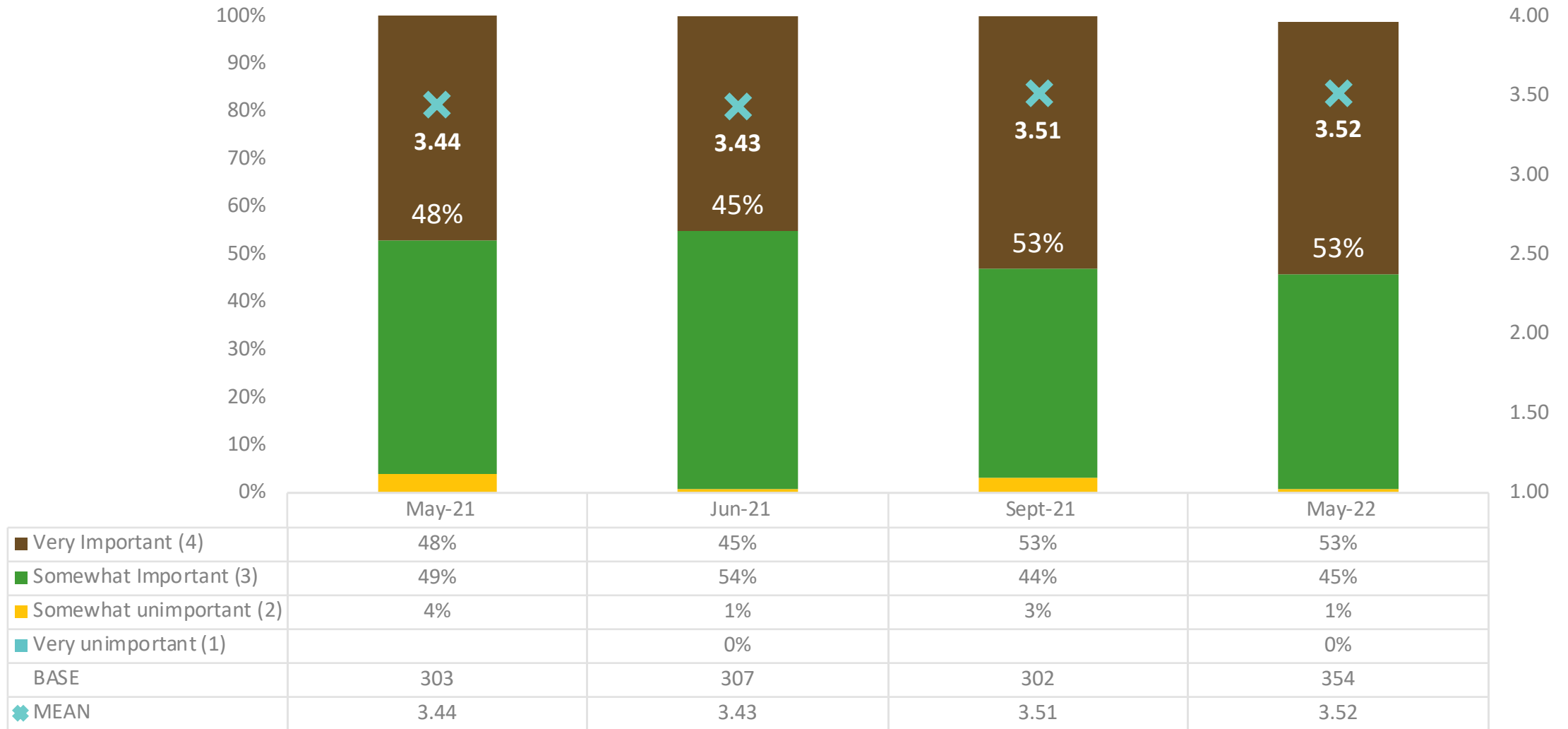
I consider health risks when traveling out of my own country



Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



I enjoy sightseeing and tours during my trip



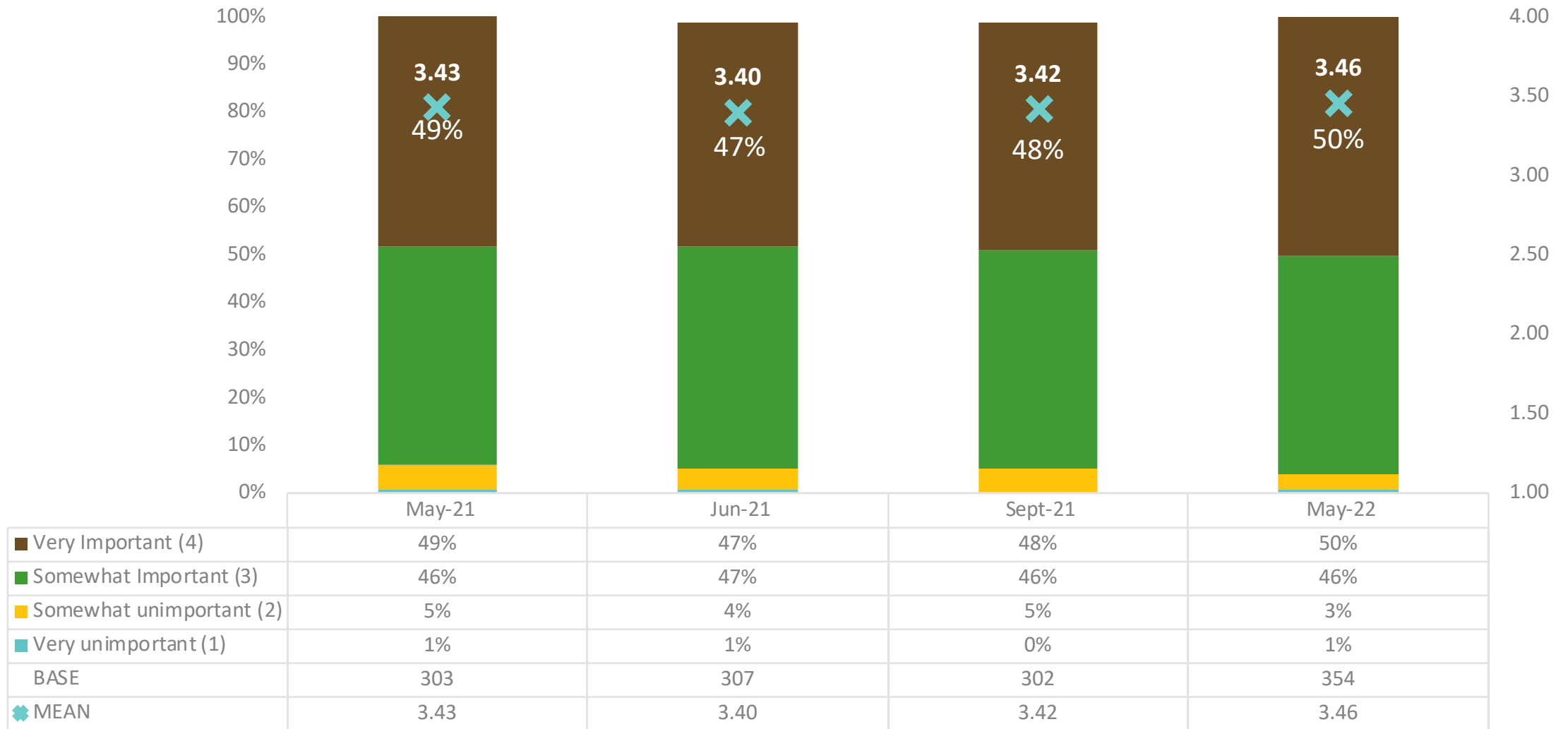
Q: When considering a destination to visit, how important are each of the following in your decision of where to go?

Note: 2022 variable: "I enjoy sightseeing and tours during my trip"

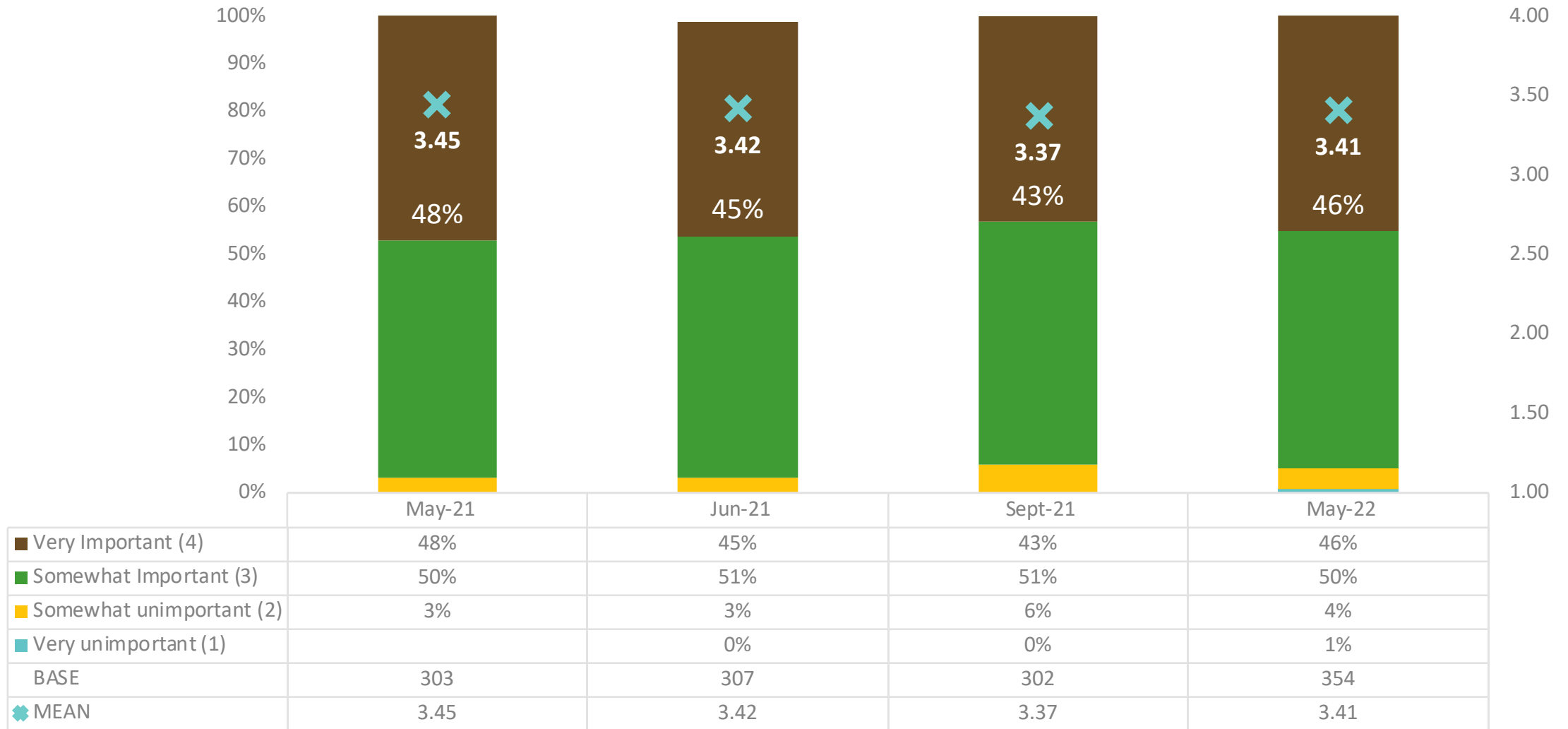
Note 2021 variable: "I enjoy sightseeing and tours during my vacation"



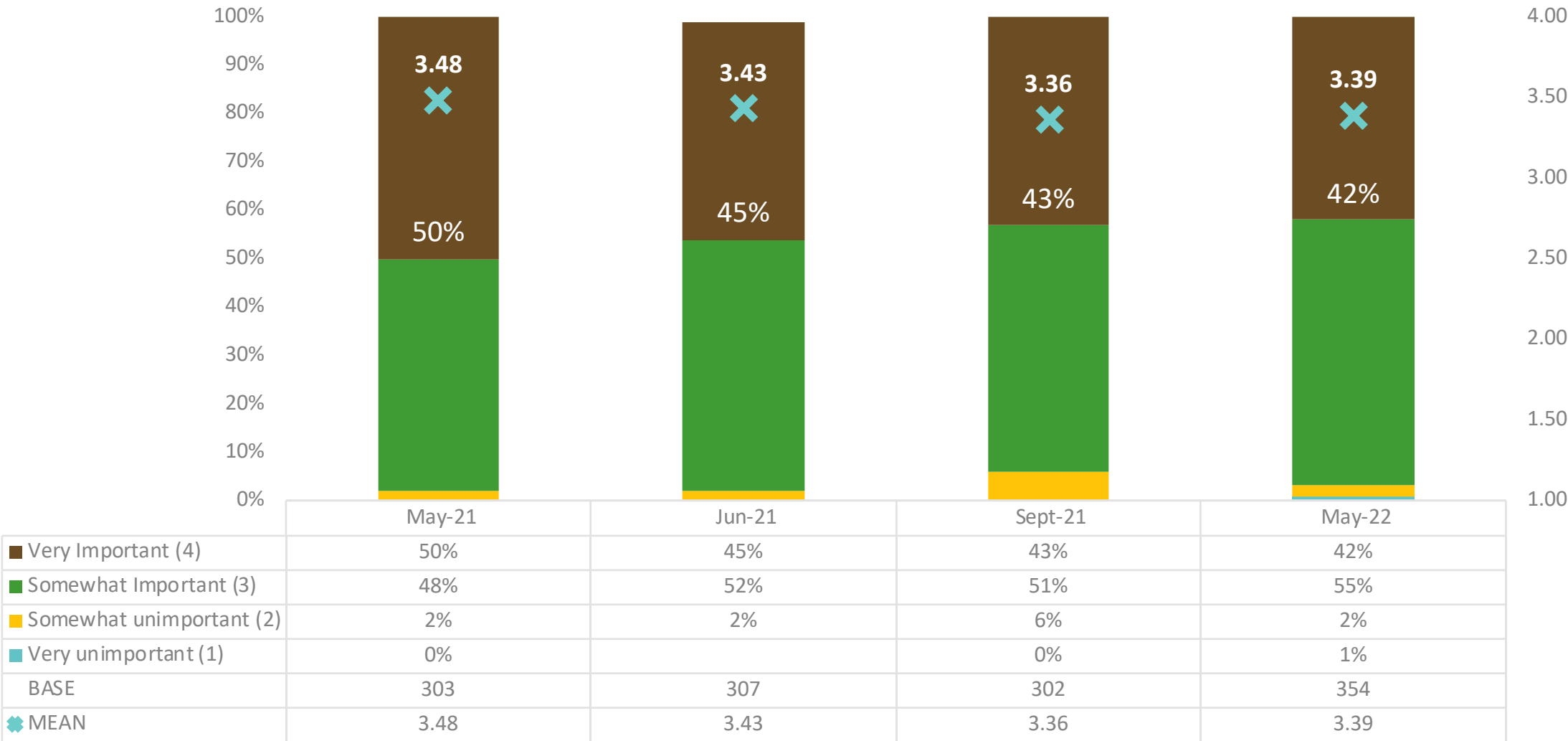
I would like to try a new food and local cuisine



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



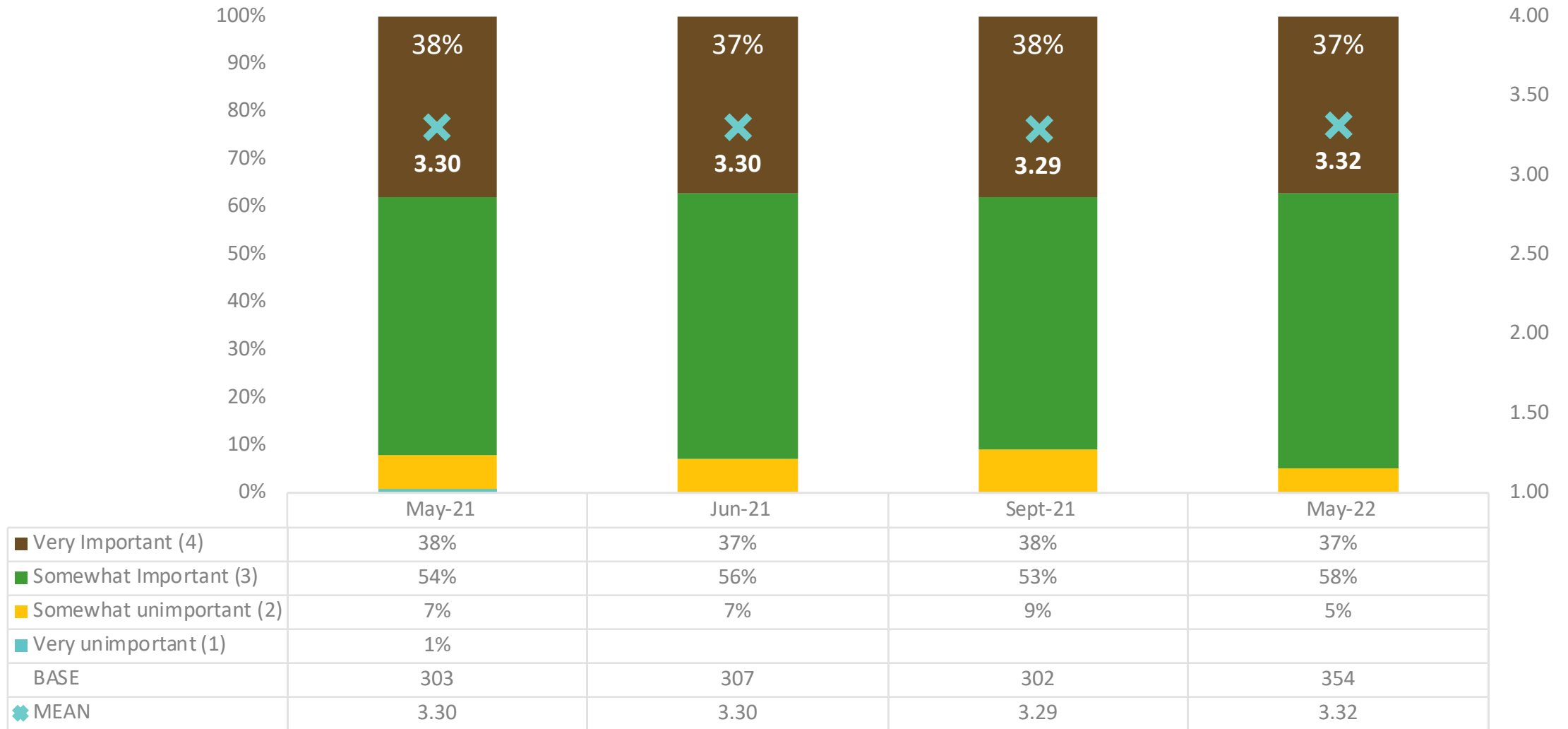
Cleanliness is important when choosing a destination



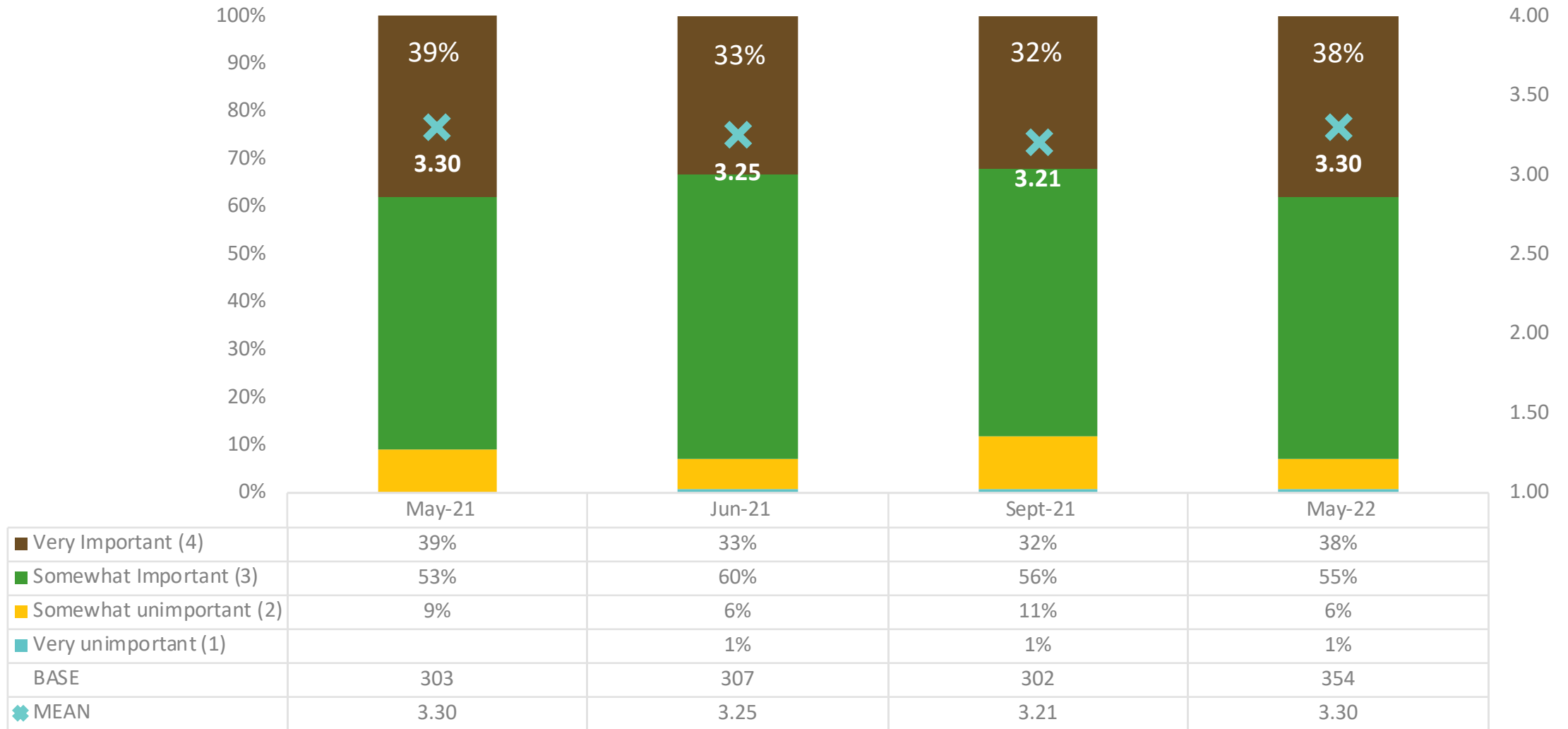
Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



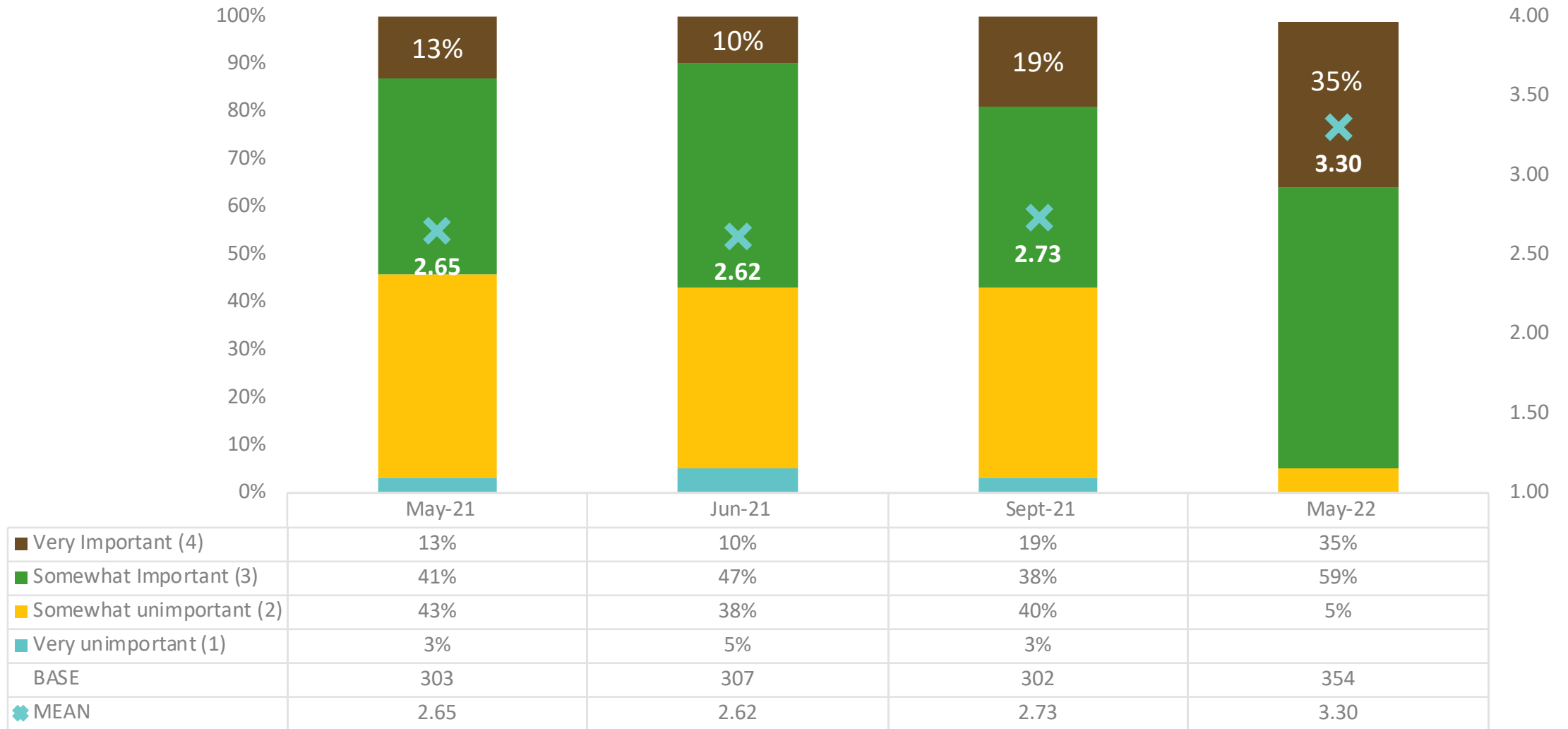
I would like to increase my knowledge about places, people, culture, and things of the destination



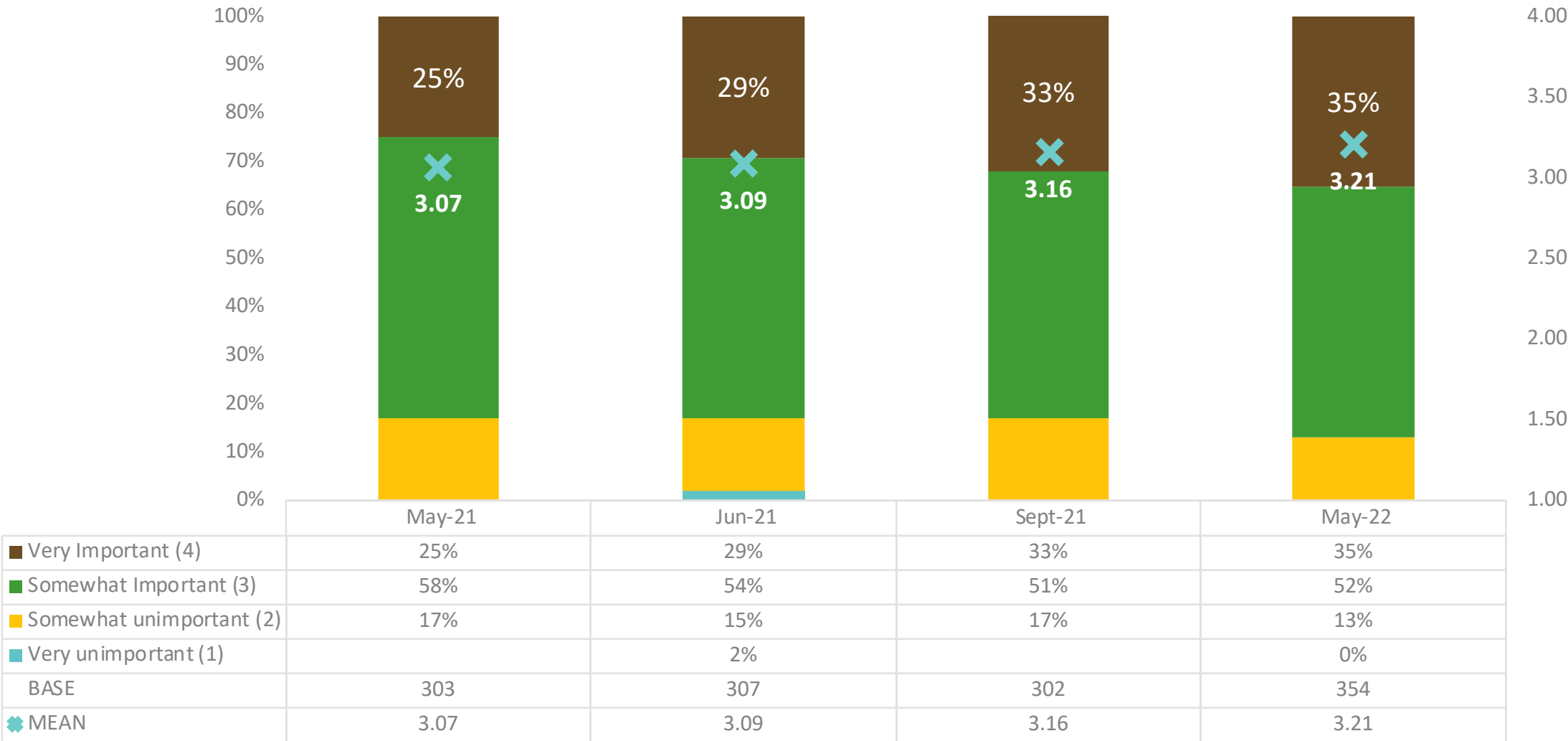
I want to take part in nature-based activities



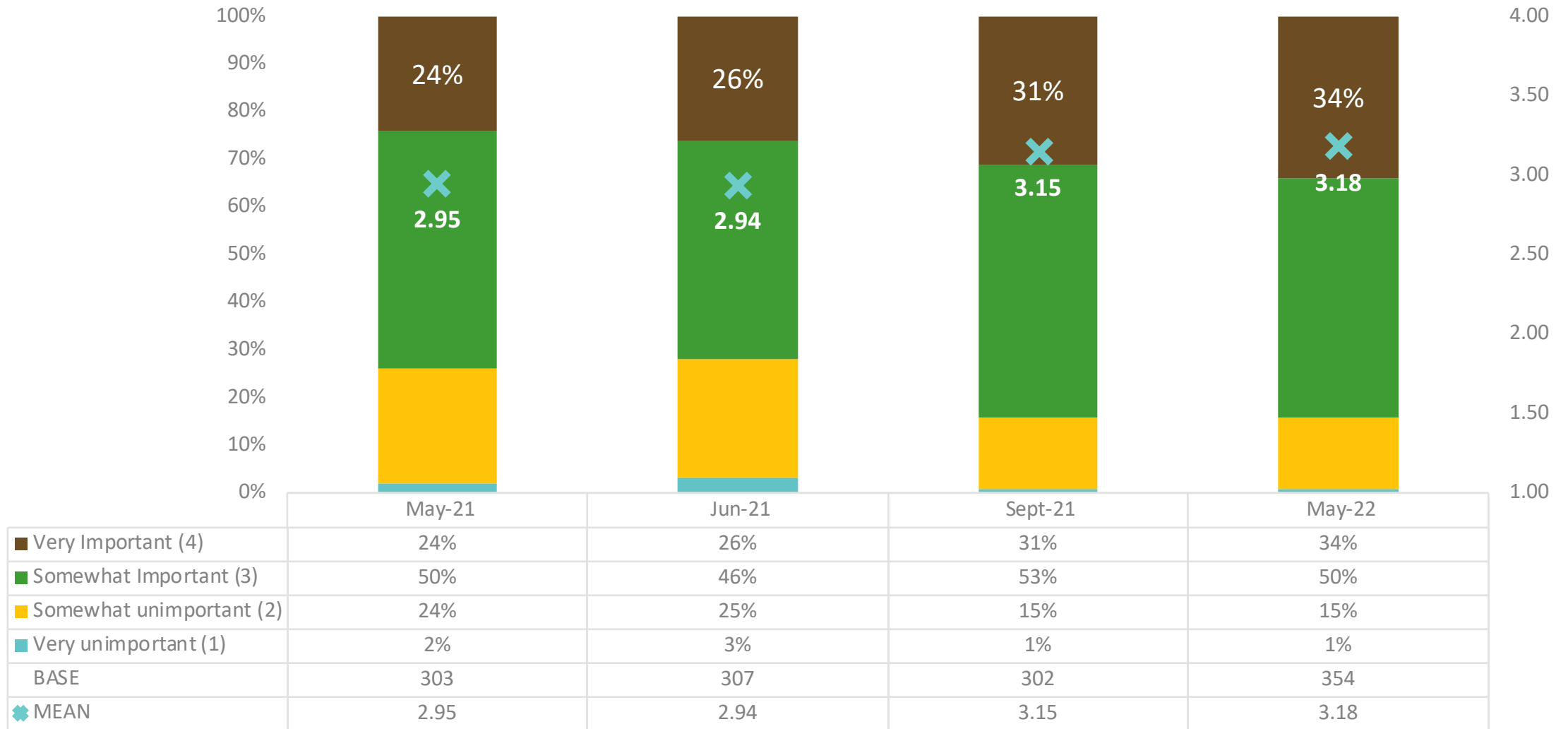
I would like to meet new and interesting people



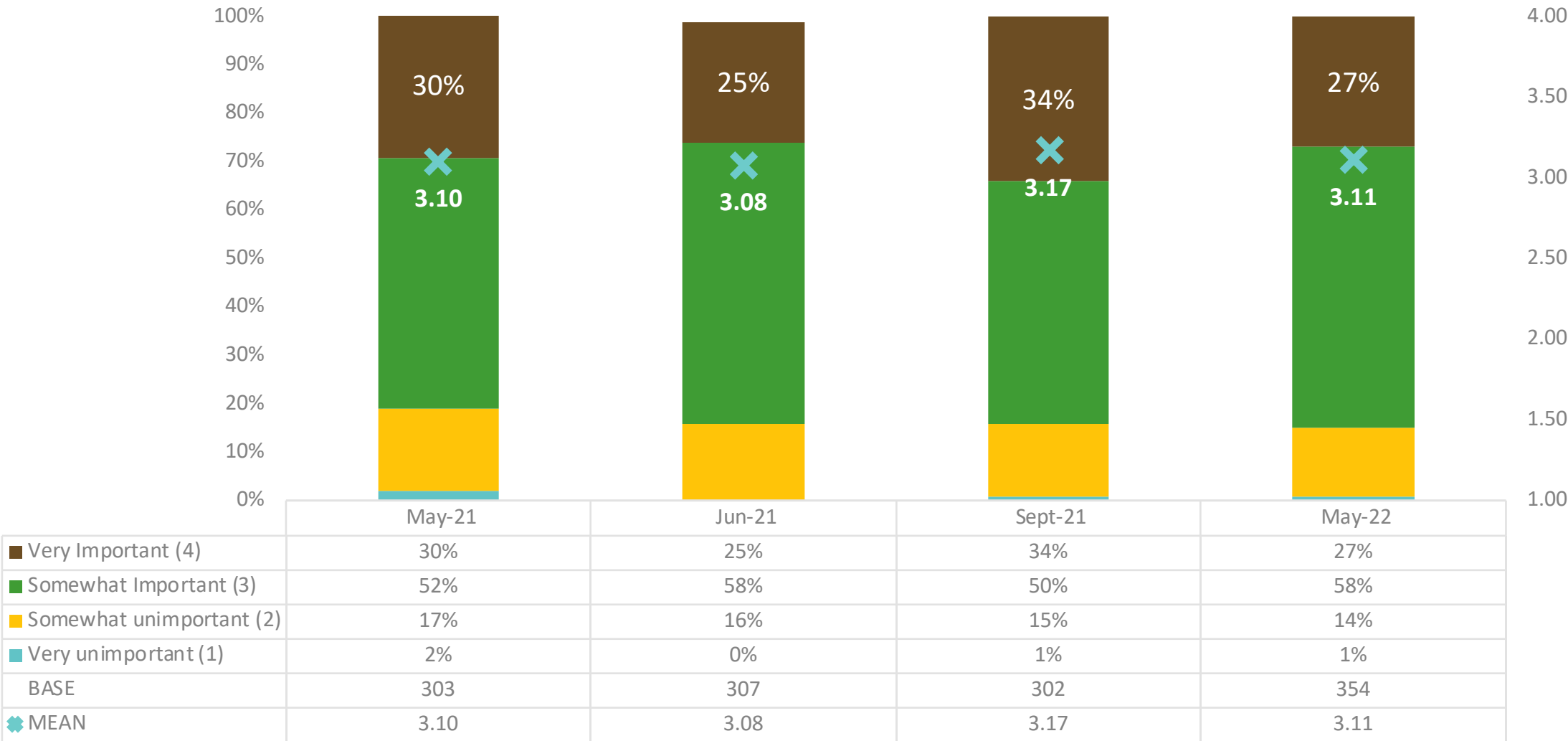
I would like to do something that I could not do in my daily life



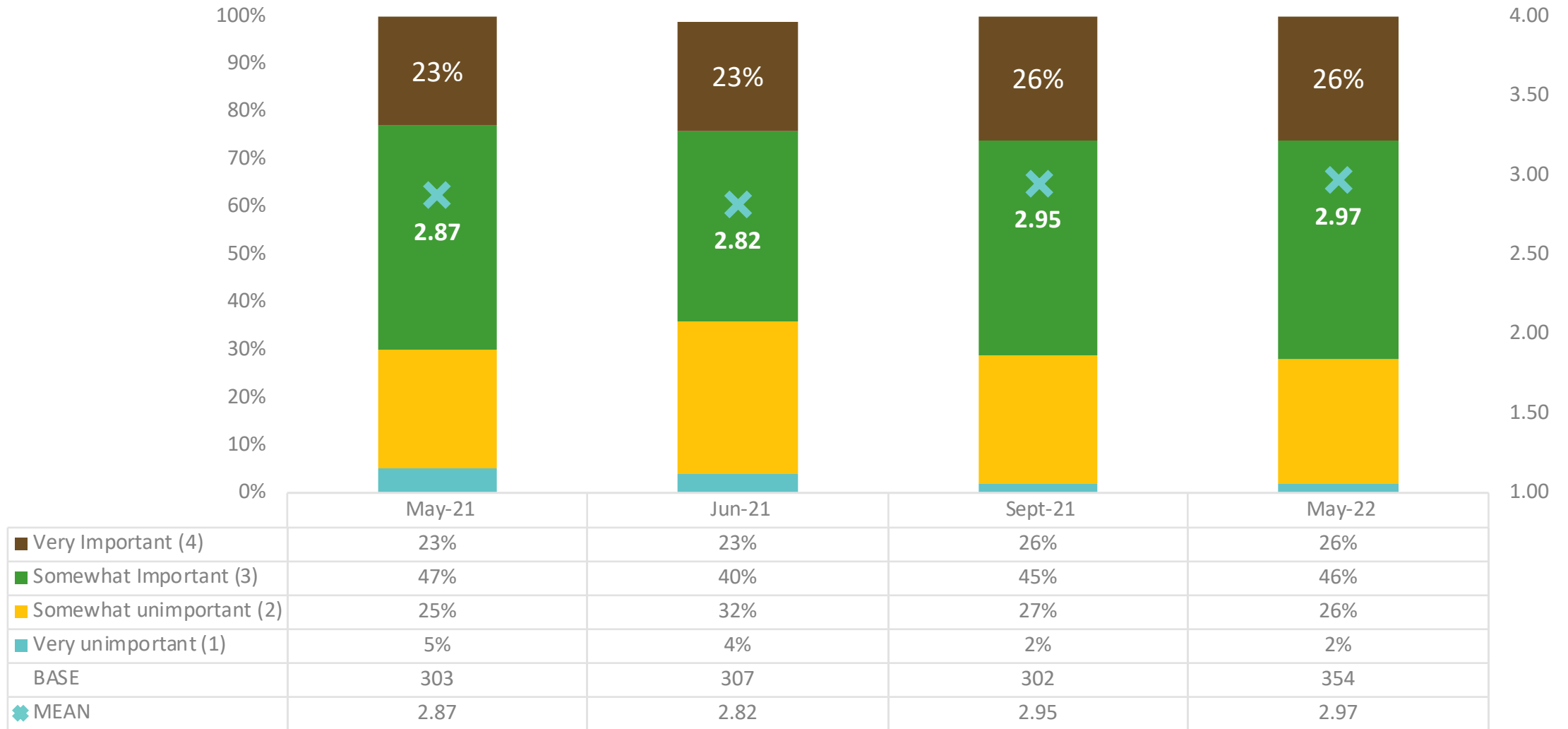
I want to escape my everyday life



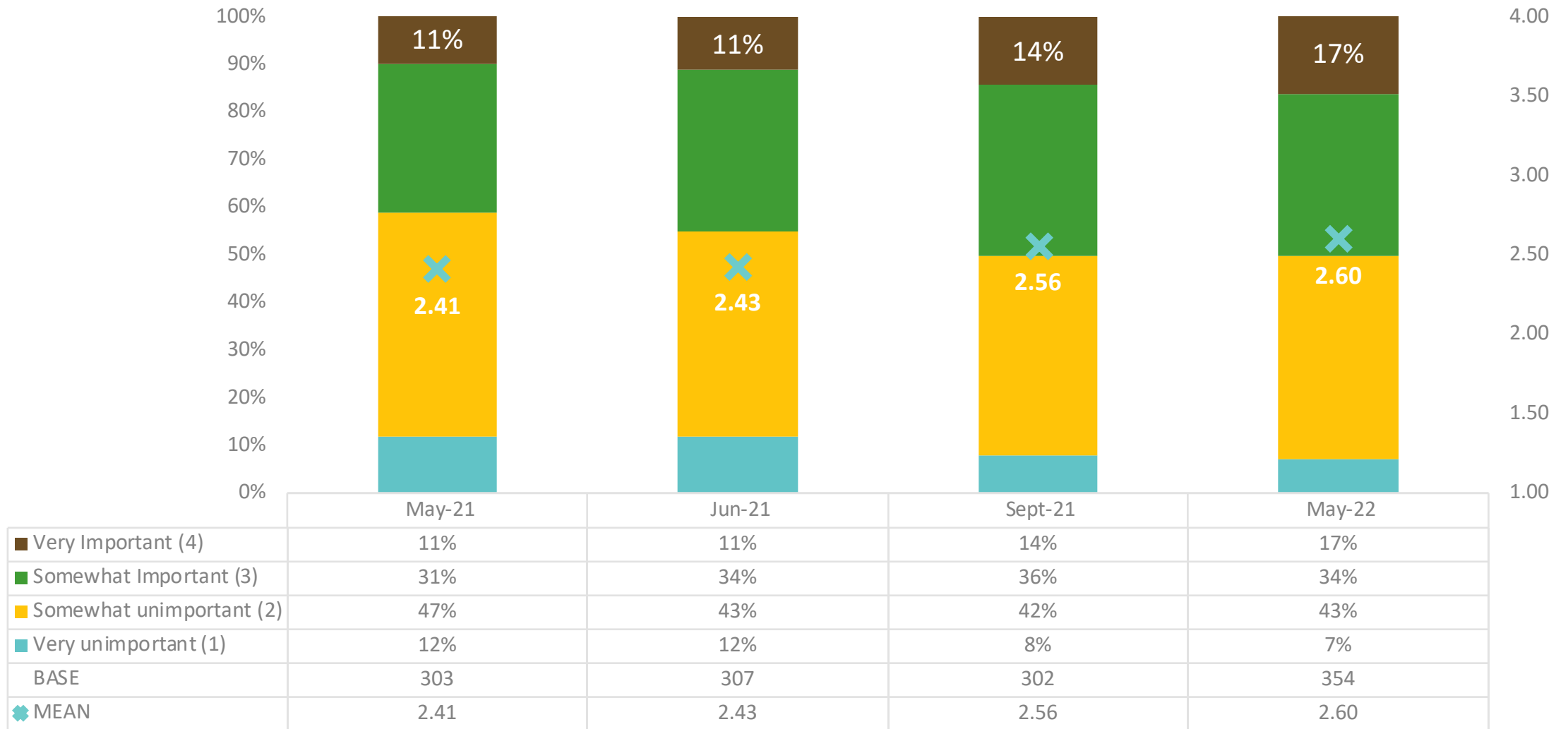
I like visiting destinations that most people value and appreciate



I am interested in shopping

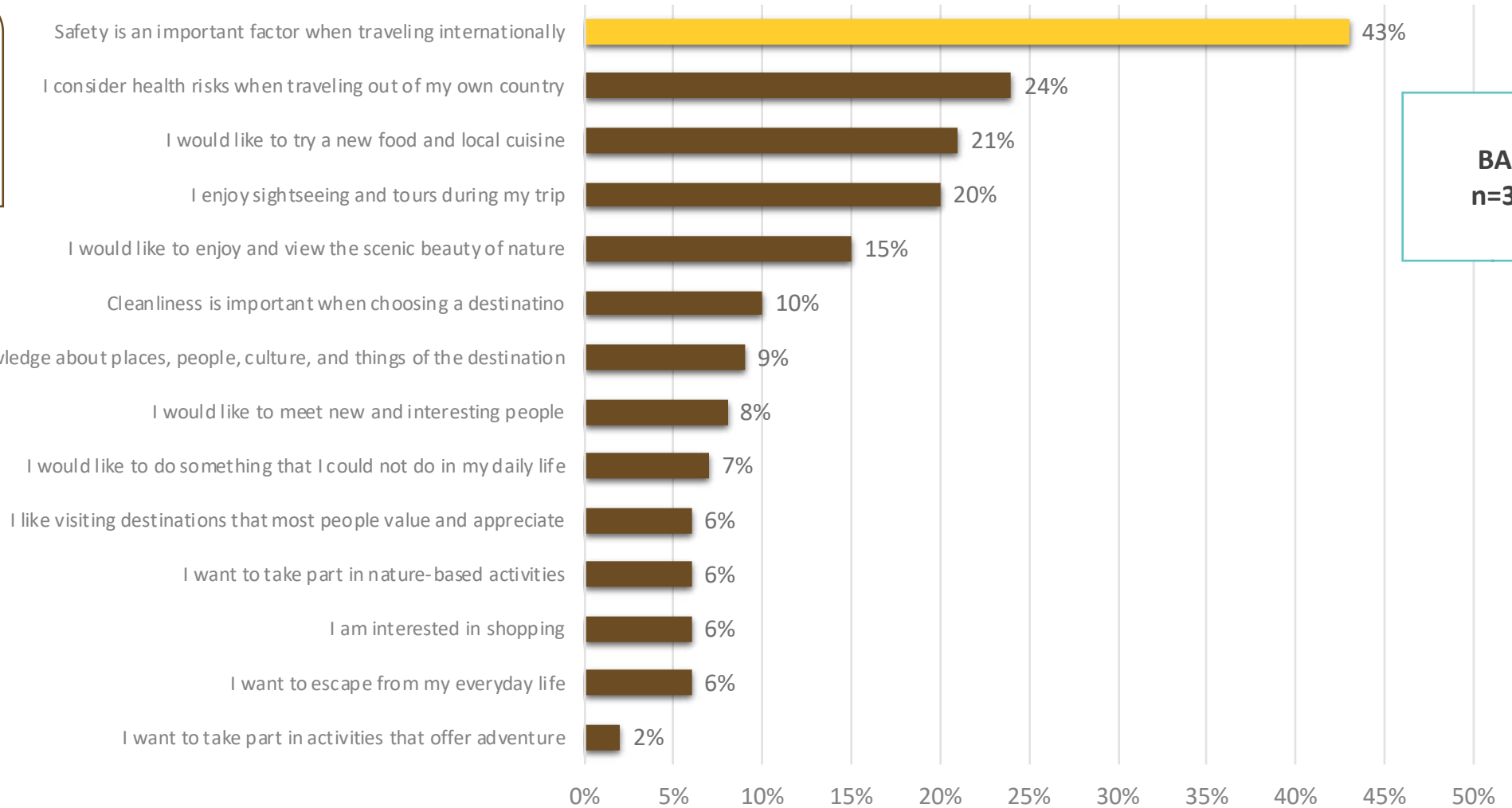


I want to take part in activities that offer adventure



DESTINATION SELECTION FACTORS – TOP TWO

Safety was the top selection factor chosen.



BASE
n=321

DESTINATION SELECTION FACTORS – TOP TWO

| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|---|----------|-----------|-----------|----------|
| BASE | 264 | 282 | 263 | 321 |
| <i>Safety is an important factor when traveling internationally</i> | 52% | 53% | 46% | 43% |
| <i>I consider health risks when traveling out of my own country</i> | 27% | 28% | 15% | 24% |
| <i>I would like to try a new food and local cuisine</i> | 23% | 20% | 25% | 21% |
| <i>I enjoy sightseeing and tours during my vacation</i> | 16% | 12% | 18% | 20% |
| <i>I would like to enjoy and view the scenic beauty of nature</i> | 18% | 16% | 13% | 15% |
| <i>Cleanliness is important when choosing a destination</i> | 14% | 6% | 11% | 10% |
| <i>I would like to increase my knowledge about places, people, culture, and things of the destination</i> | 11% | 11% | 9% | 9% |
| <i>I would like to meet new and interesting people</i> | 2% | 1% | 4% | 8% |
| <i>I would like to do something that I could not do in my daily life</i> | 2% | 6% | 7% | 7% |
| <i>I like visiting destinations that most people value and appreciate</i> | 3% | 3% | 8% | 6% |
| <i>I am interested in shopping</i> | 4% | 7% | 7% | 6% |
| <i>I want to escape from my everyday life</i> | 4% | 6% | 5% | 6% |
| <i>I want to take part in nature-based activities</i> | 6% | 7% | 7% | 2% |
| <i>I want to take part in activities that offer adventure</i> | 1% | 1% | 0% | 2% |



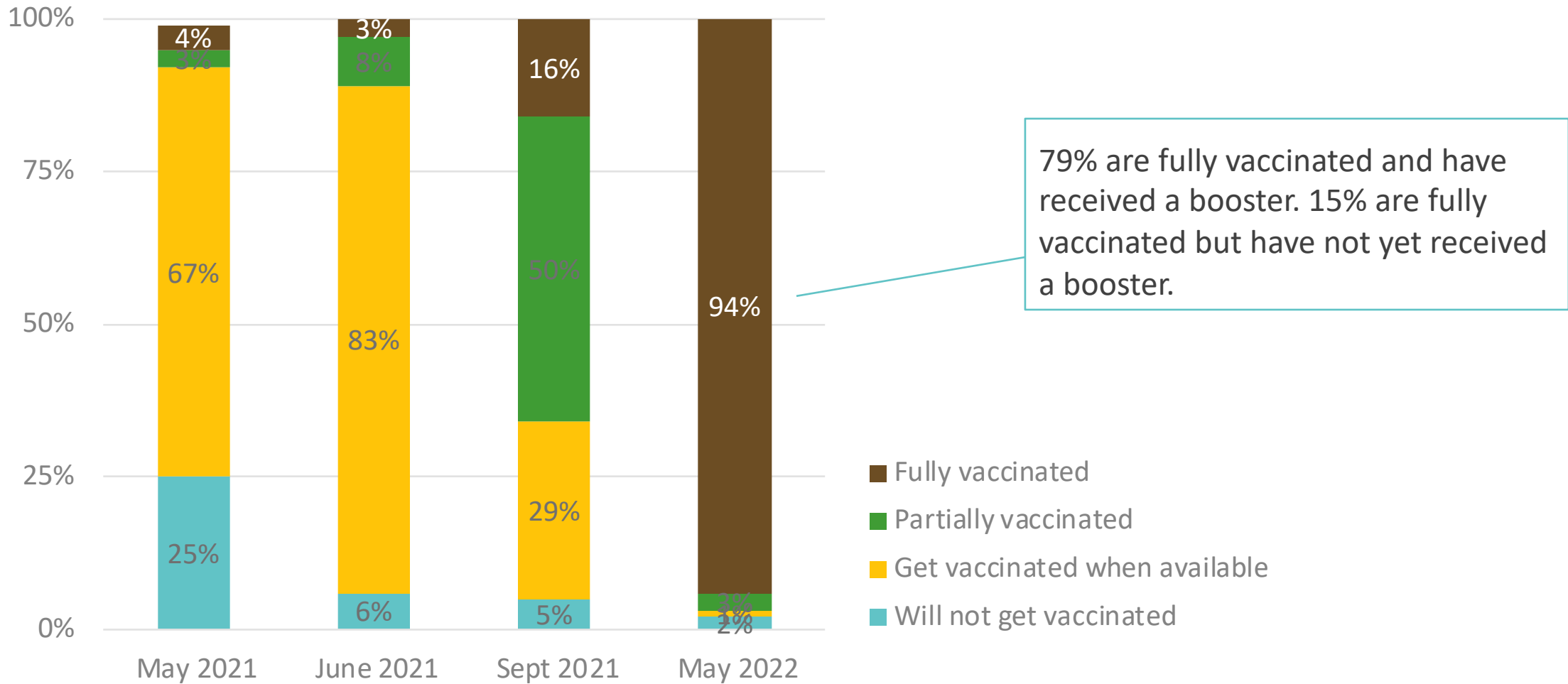


SECTION 2

COVID-19

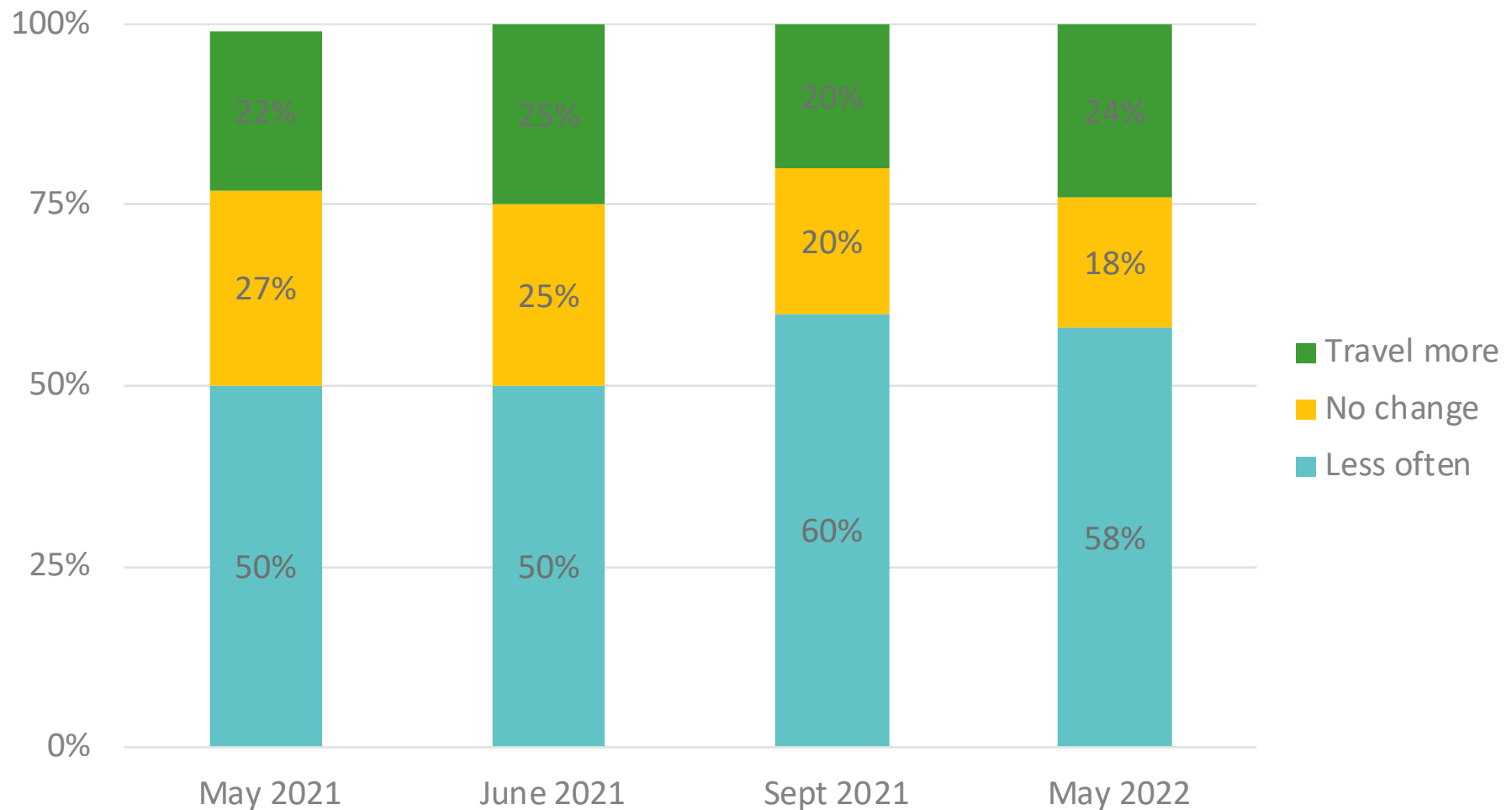


COVID-19 VACCINE STATUS



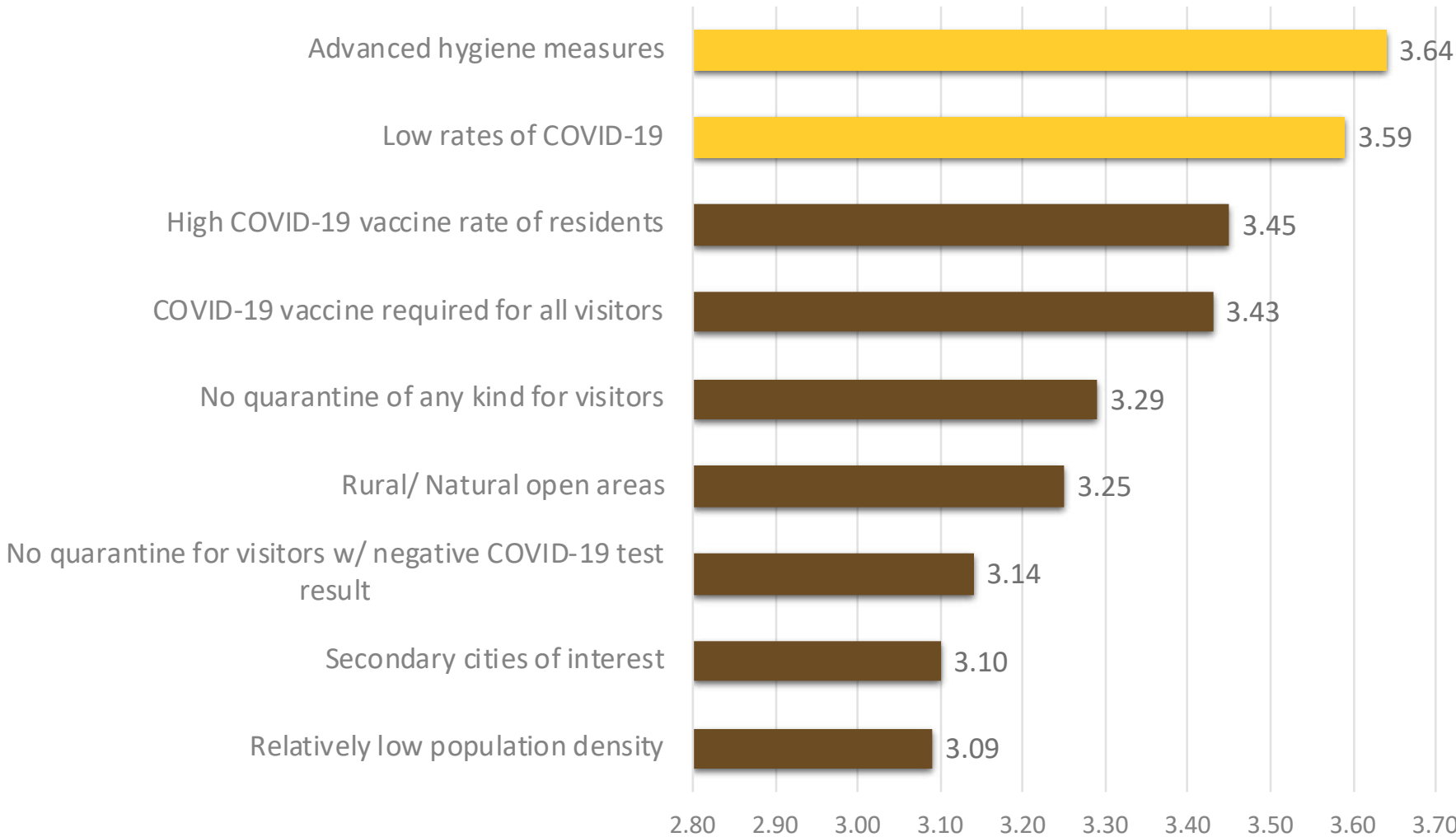
POST-COVID TRAVEL

Recovery of the Taiwanese market will take time.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE



Importance of "Low rates of COVID-19" has **decreased** in importance, from 3.71 mean in Sept. 2021.

Importance of "Advanced hygiene measures" has **increased** in importance, from 3.51 mean in Sept. 2021.

Importance of "No quarantine of any kind for visitors" has **increased** from 2.72 in Sept. 2021.

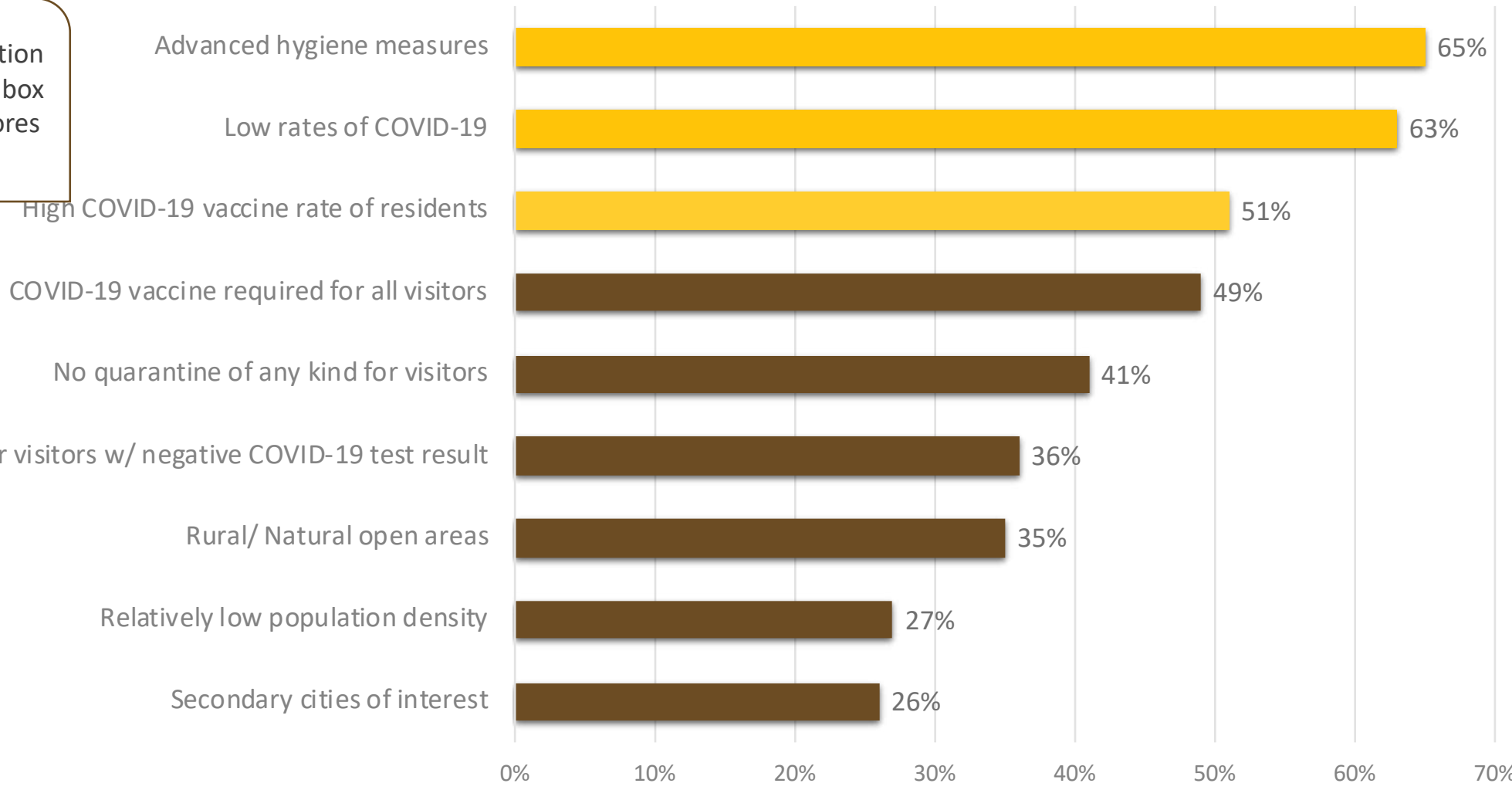
Q: When considering an international destination for travel after COVID-19-related travel restrictions are lifted, how important are each of the following to you in selecting a destination to visit?



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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

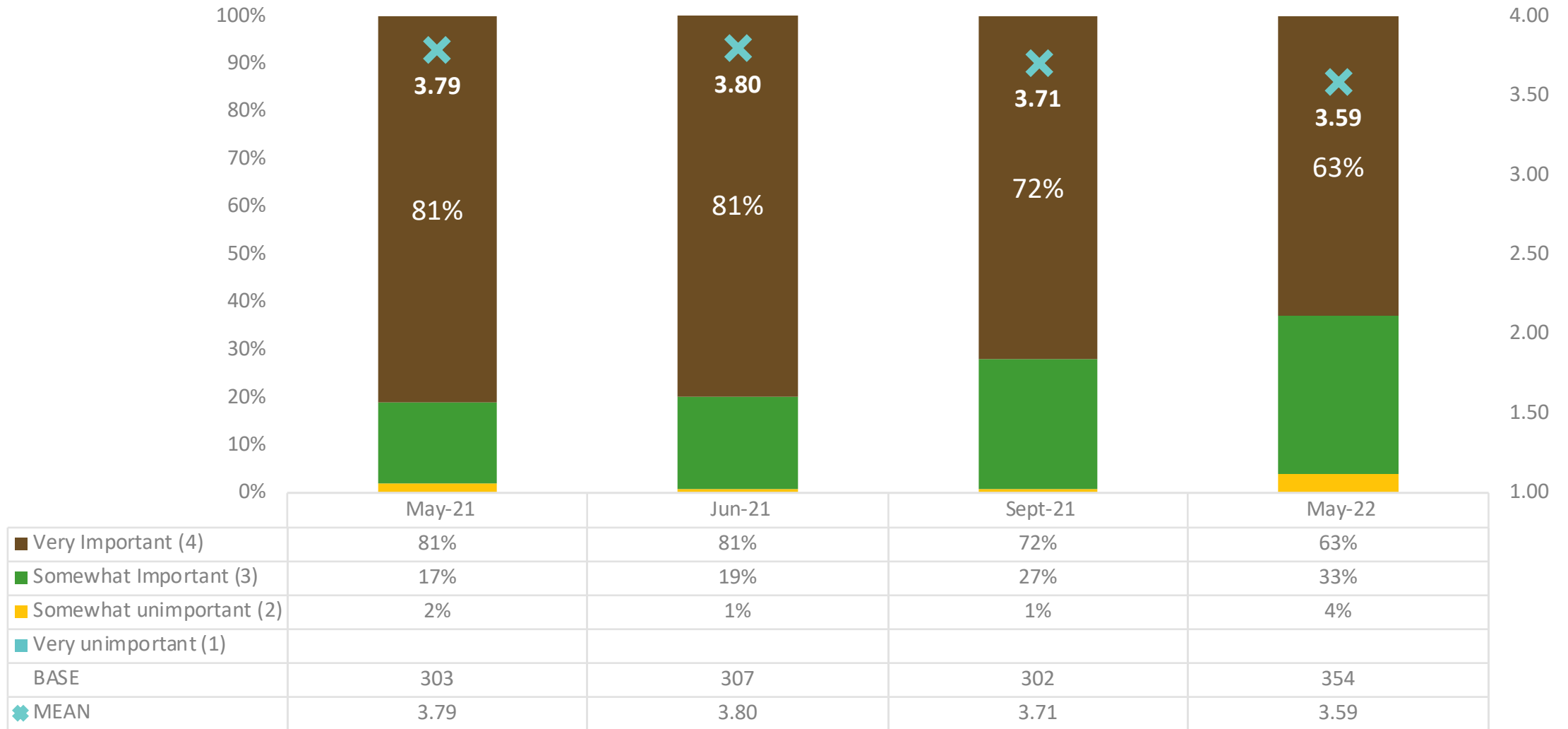


Q: When considering an international destination for travel after COVID-19-related travel restrictions are lifted, how important are each of the following to you in selecting a destination to visit?



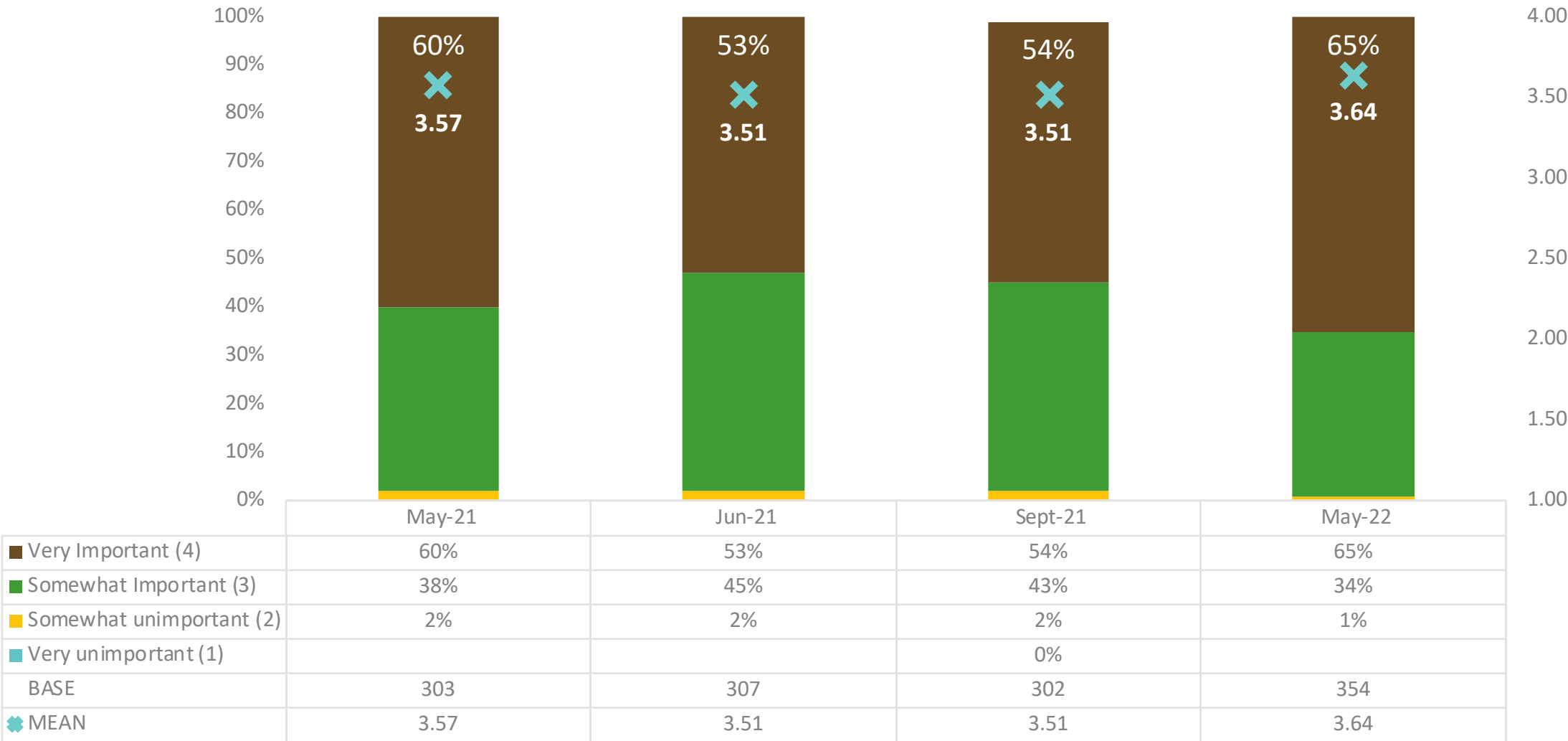
POST-COVID SELECTION FACTOR

Low rates of COVID-19



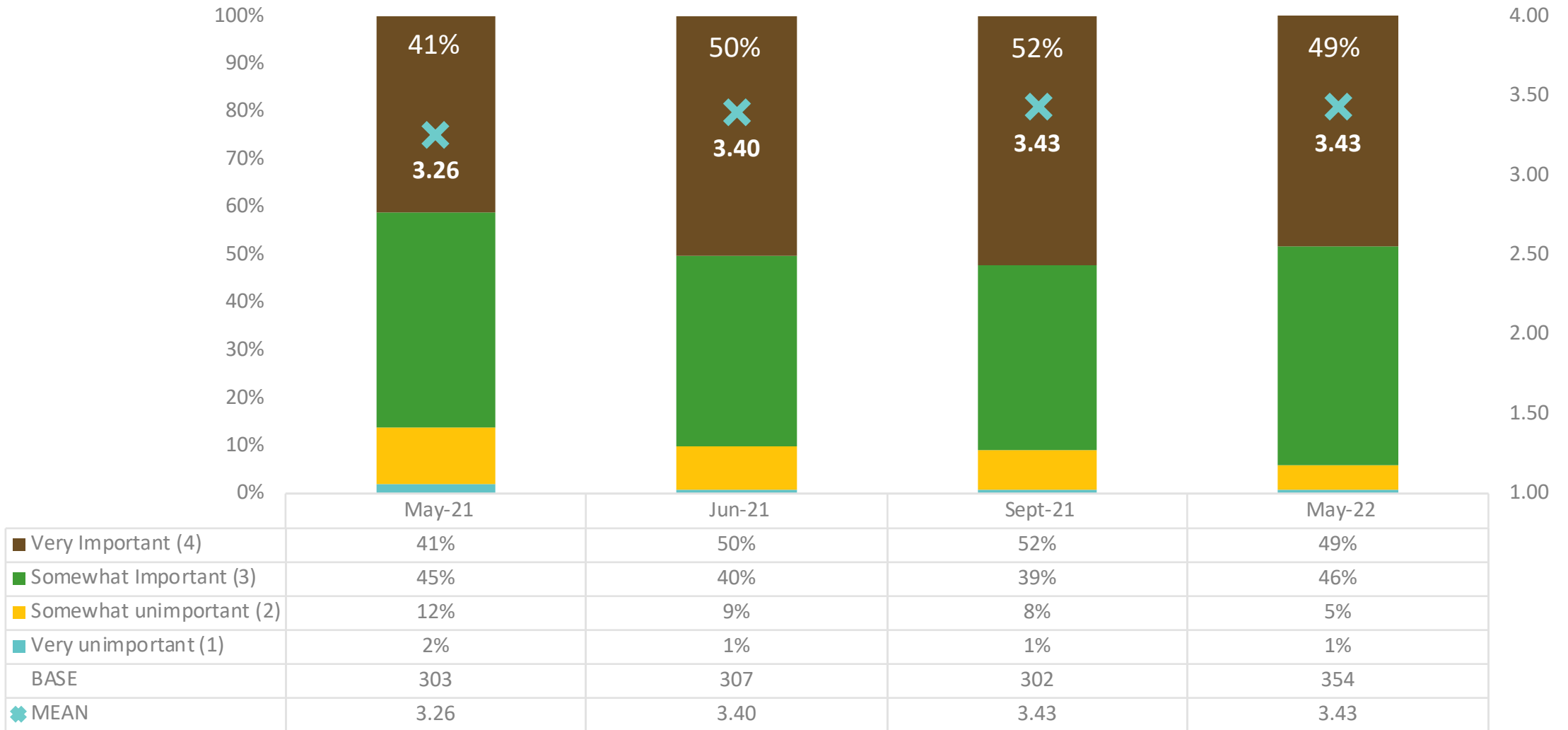
POST-COVID SELECTION FACTOR

Advanced hygiene measures



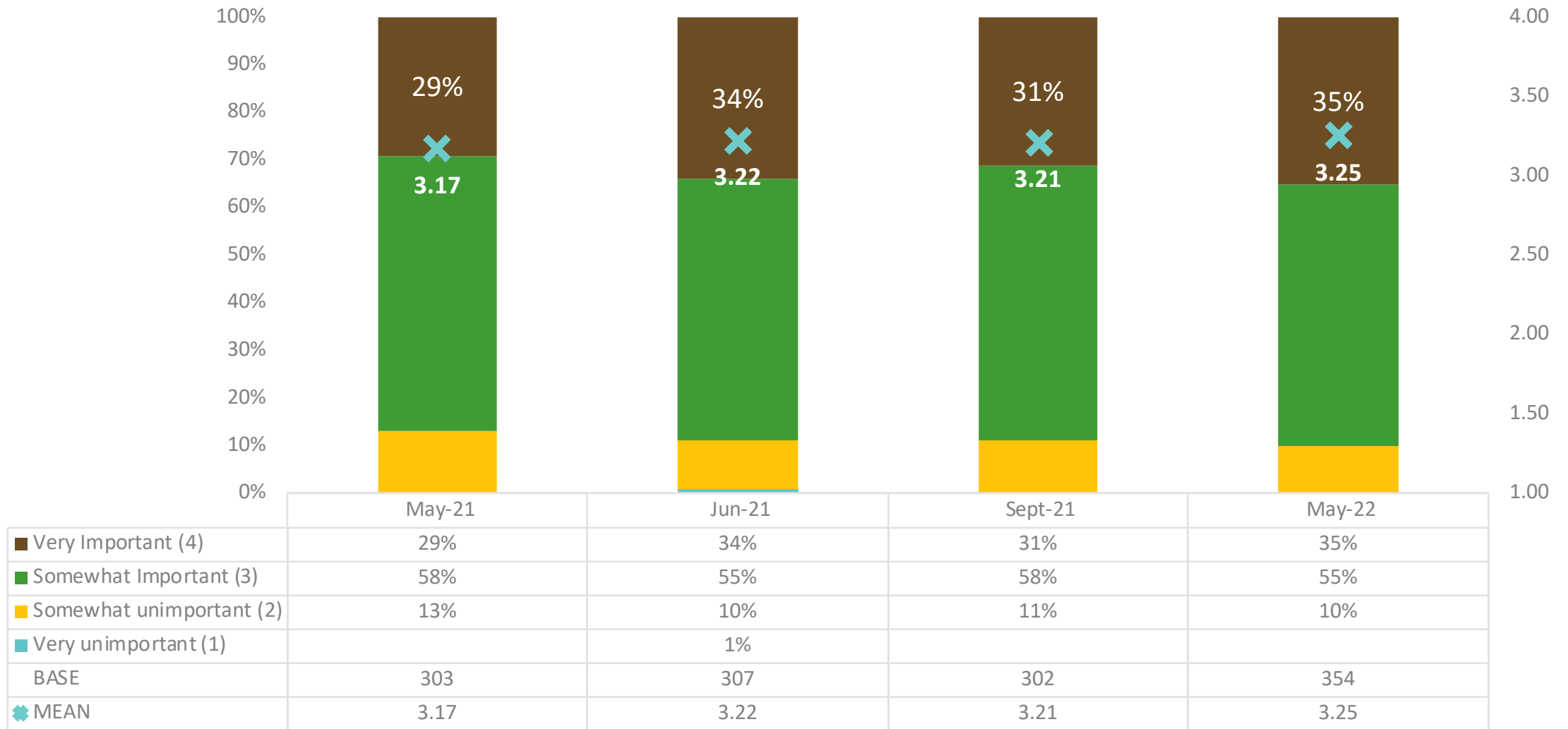
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



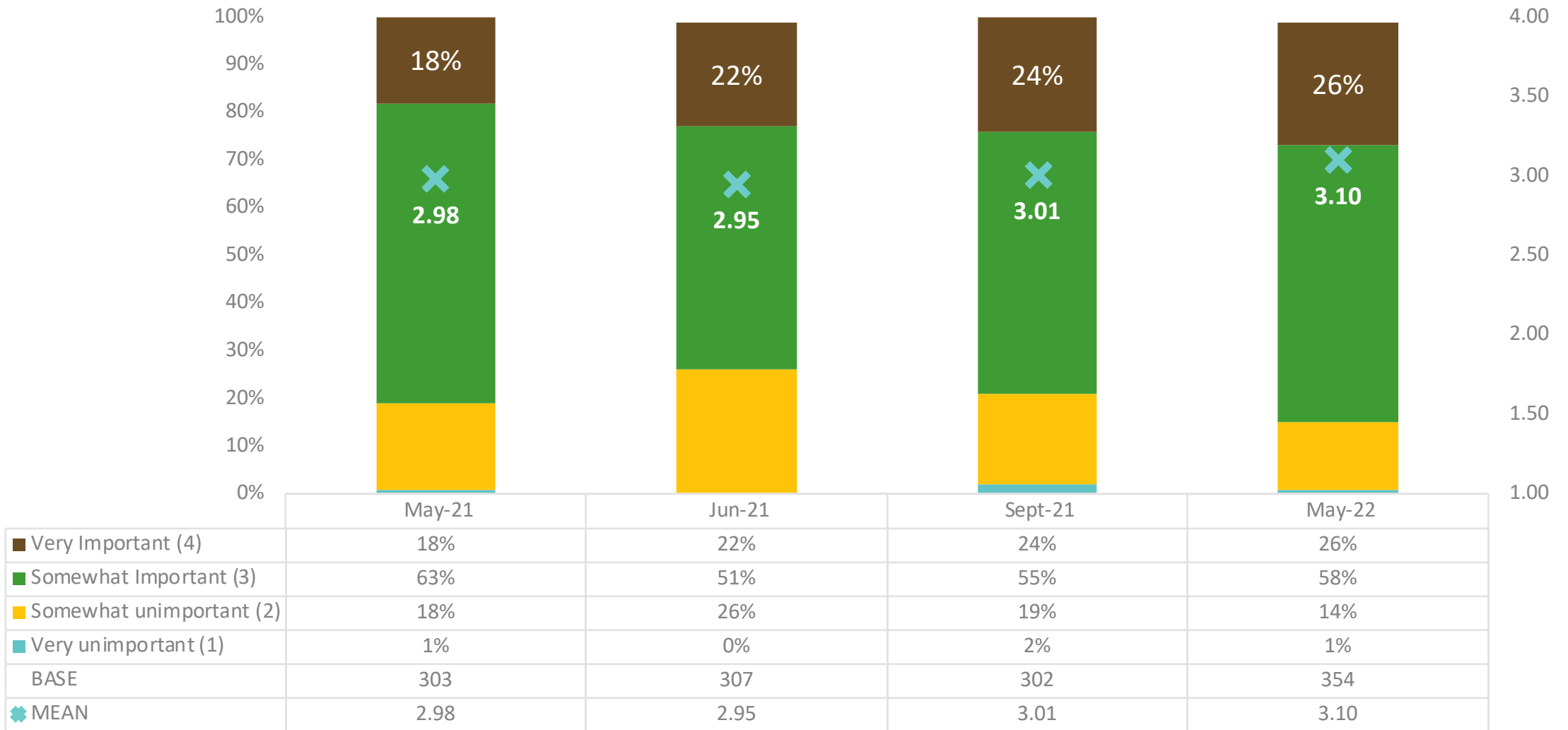
POST-COVID SELECTION FACTOR

Rural/ natural open areas



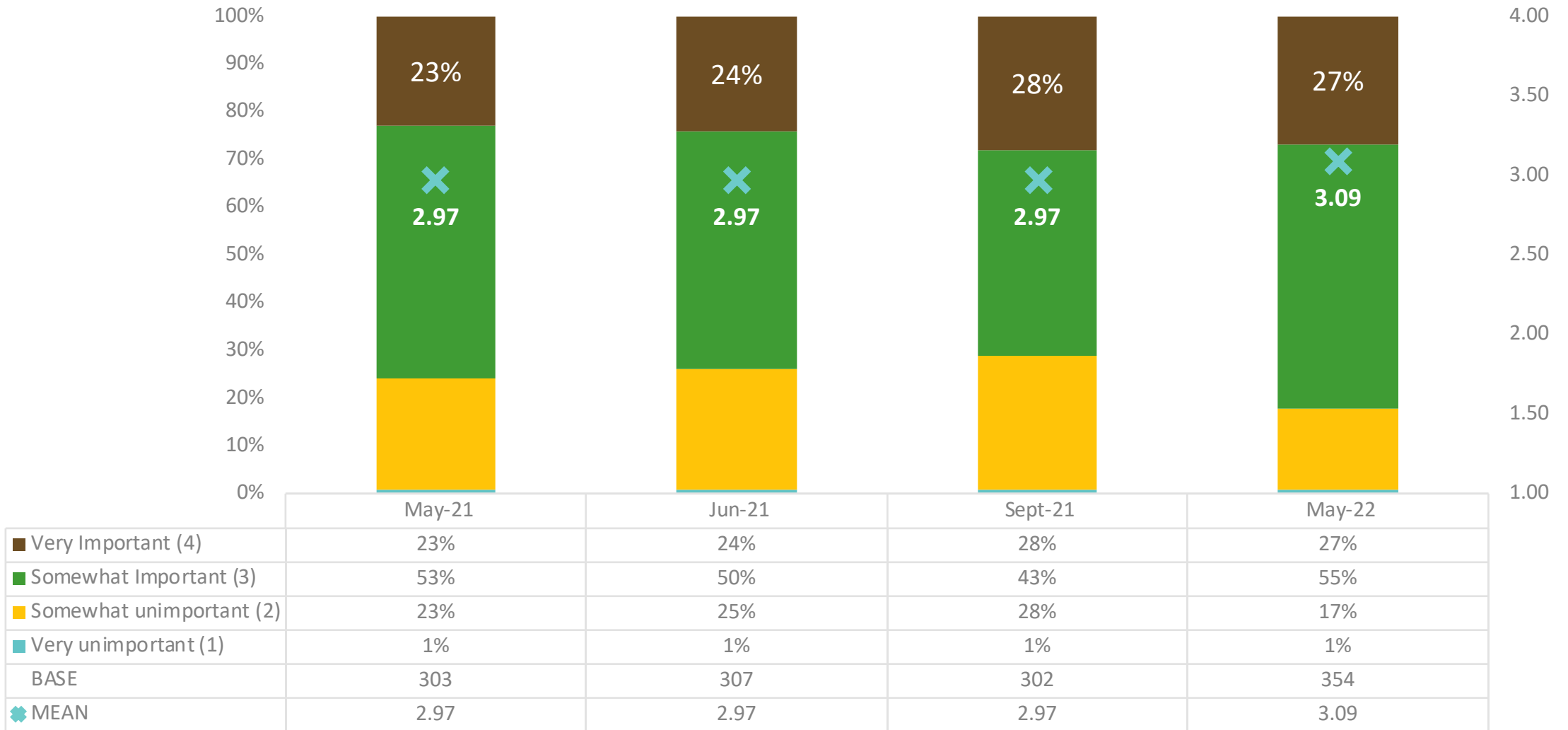
POST-COVID SELECTION FACTOR

Secondary cities of interest



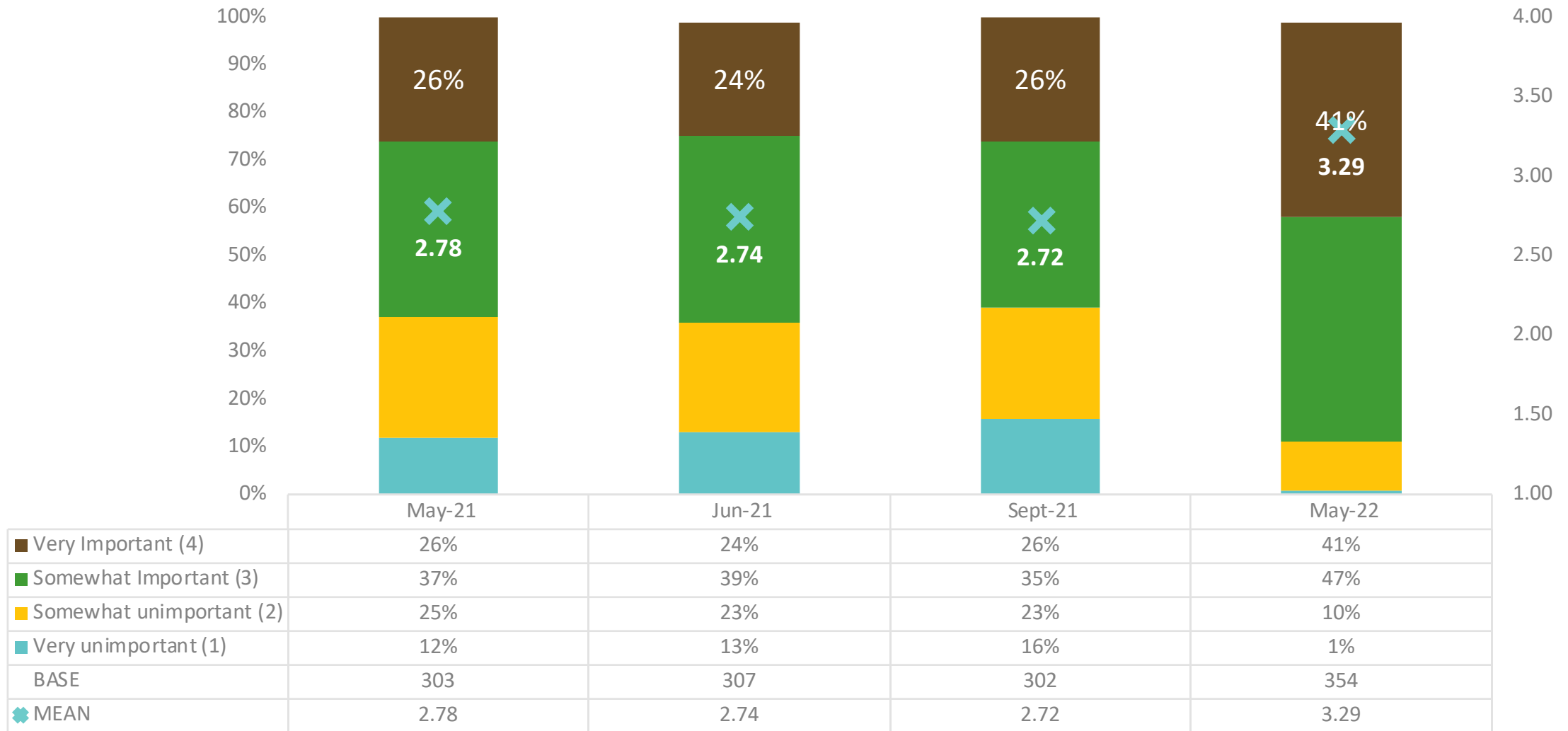
POST-COVID SELECTION FACTOR

Relatively low population density

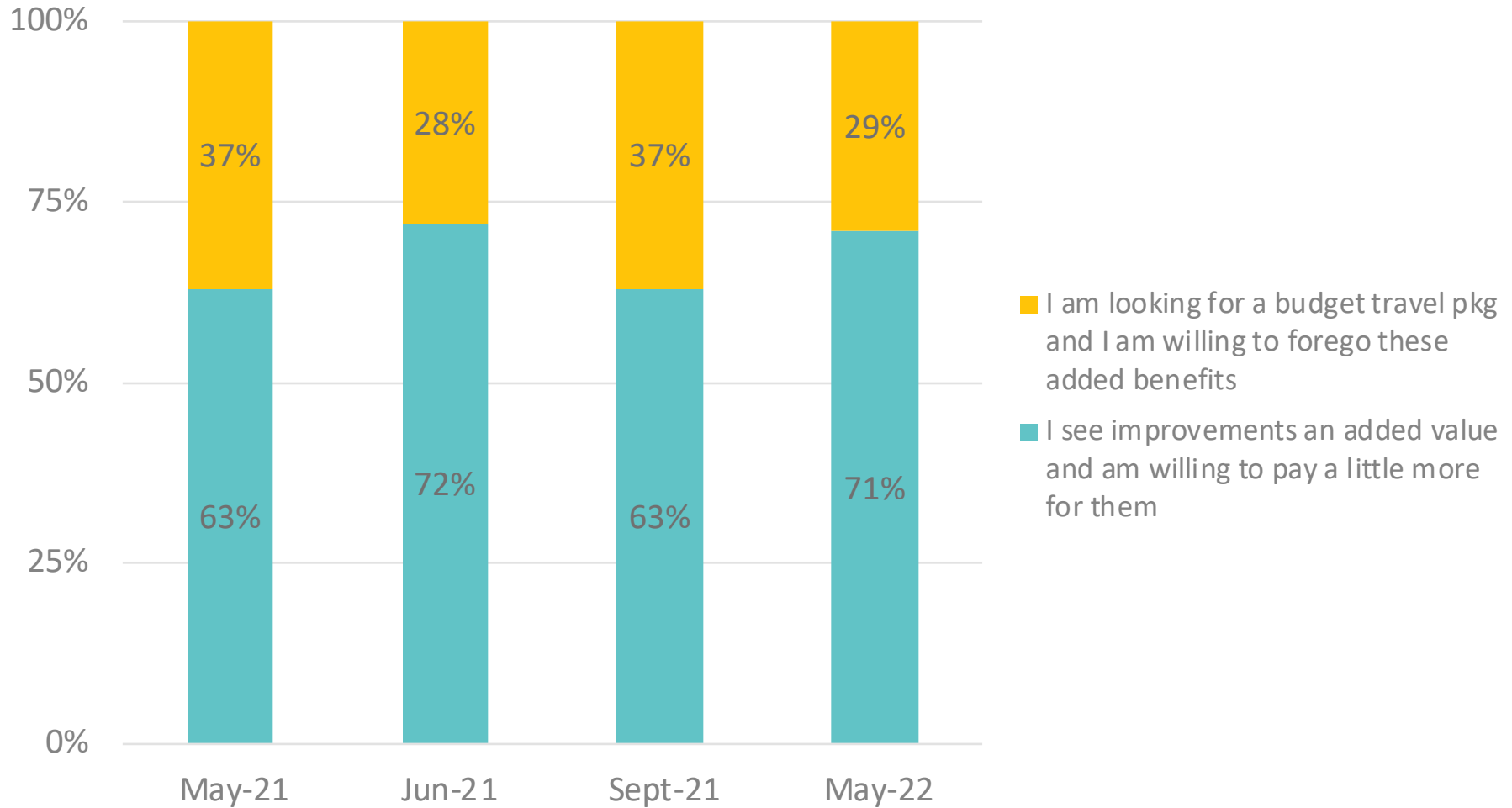


POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



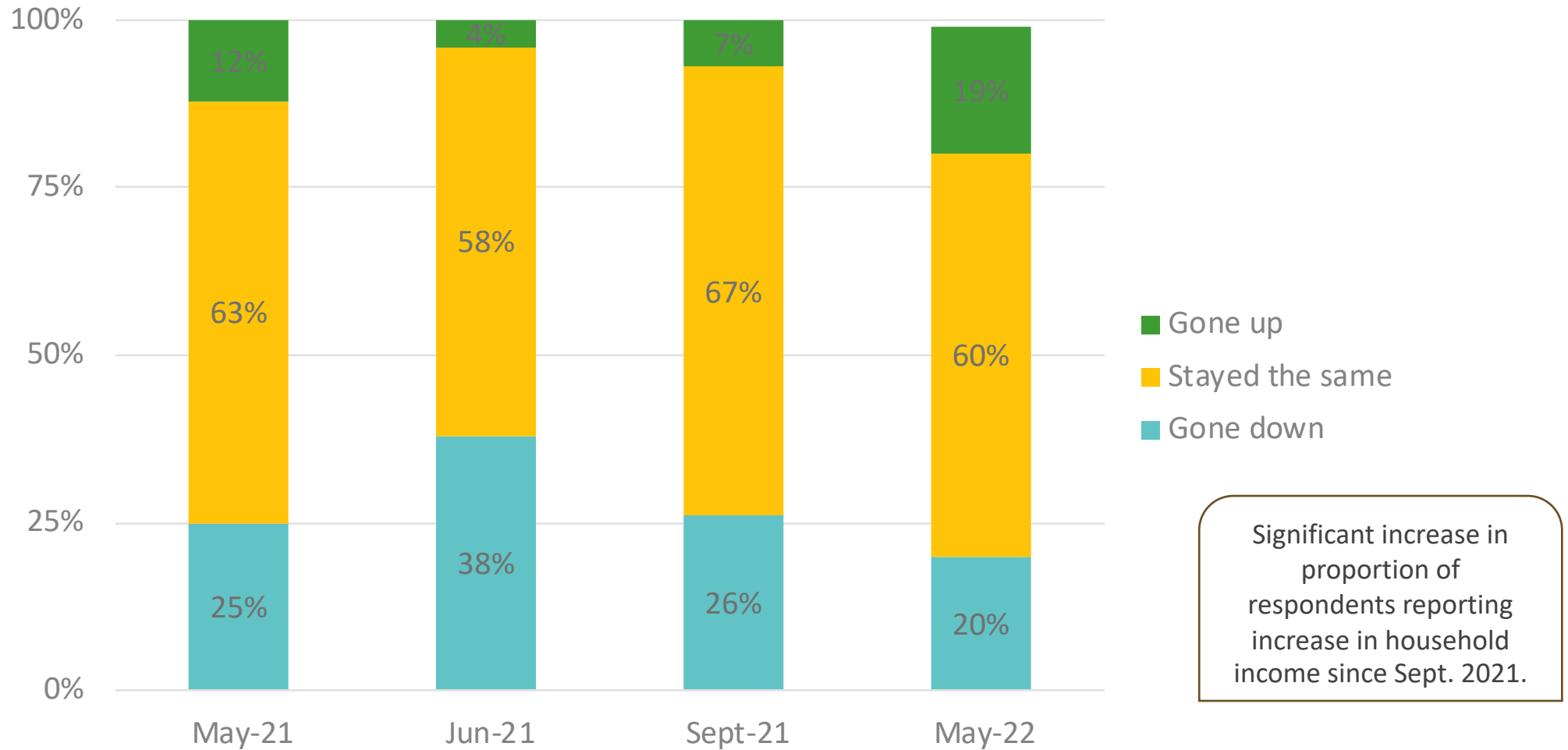
GUAM AIRPORT COVID-19 SAFETY MEASURES



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



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



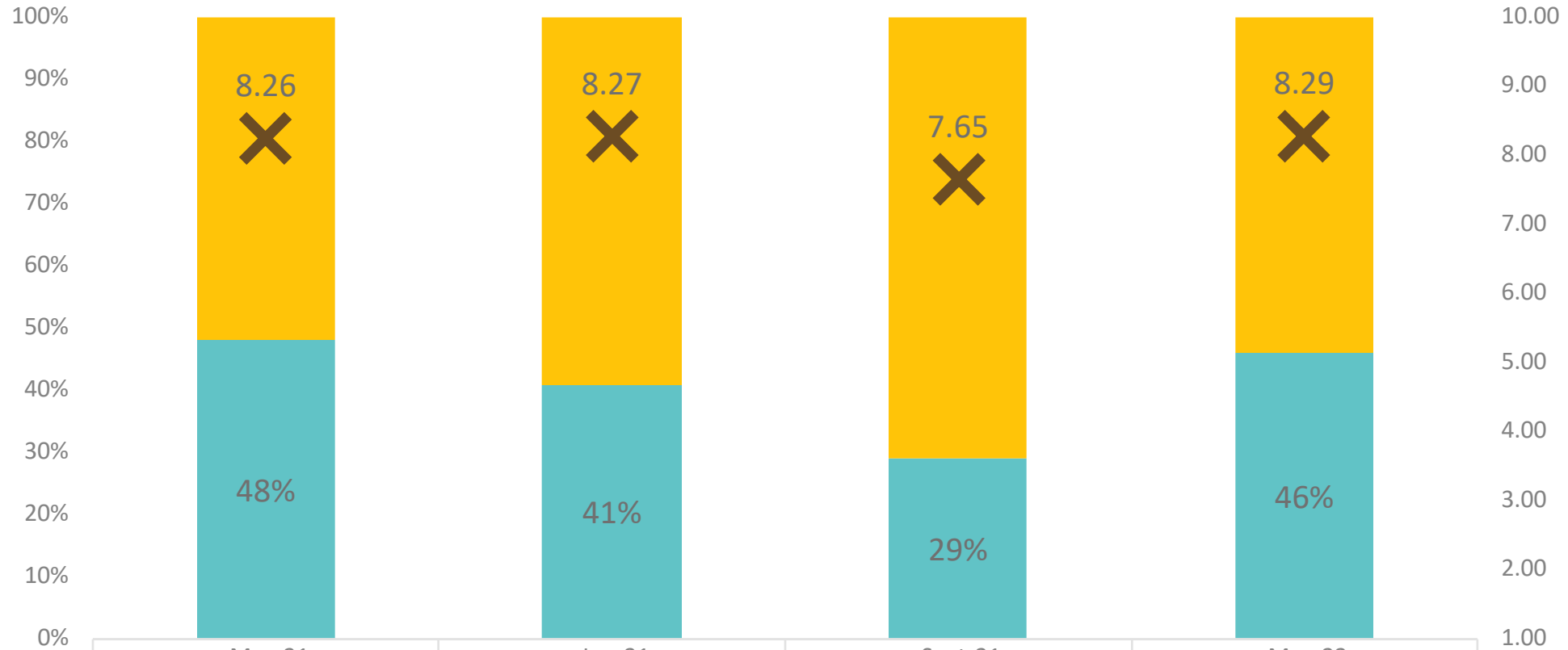


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



| | May-21 | Jun-21 | Sept-21 | May-22 |
|---------------|--------|--------|---------|--------|
| Other (1-8) | 52% | 59% | 71% | 54% |
| TopBox (9-10) | 48% | 41% | 29% | 46% |
| Base | 31 | 22 | 34 | 56 |
| MEAN | 8.26 | 8.27 | 7.65 | 8.29 |



PRIMARY TRAVEL MOTIVATION

| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|---|----------|-----------|-----------|----------|
| BASE | 31 | 22 | 34 | 56 |
| Vacation/ pleasure | 81% | 77% | 56% | 79% |
| Incentive trip | 6% | 14% | 15% | 7% |
| Honeymoon | 6% | - | 21% | 5% |
| Business/ conference/ convention/ trade show | 3% | 5% | 6% | 5% |
| Get married/ wedding | - | 5% | 3% | 4% |
| Visit family/ friends | 3% | - | - | - |



TRAVEL MOTIVATIONS – TOP 3

| | May-21 | Jun-21 | Sept-21 | May-22 |
|---|--------|--------|---------|--------|
| BASE | 31 | 22 | 34 | 56 |
| Beautiful seas, beaches, tropical climate | 58% | 50% | 32% | 50% |
| Safe place to spend a vacation | 52% | 55% | 44% | 43% |
| Recommendations | 19% | 14% | 41% | 27% |
| Sightseeing | 39% | 32% | 18% | 27% |
| Price | 19% | 36% | 32% | 25% |
| Short travel time | 10% | 23% | 24% | 25% |
| Prior trip | 26% | 23% | 21% | 23% |
| Relaxation | 42% | 18% | 24% | 21% |
| Water activities | 13% | 18% | 6% | 16% |
| Shopping | 10% | 9% | 9% | 11% |



BRAND ADVOCACY – 10PT SCALE



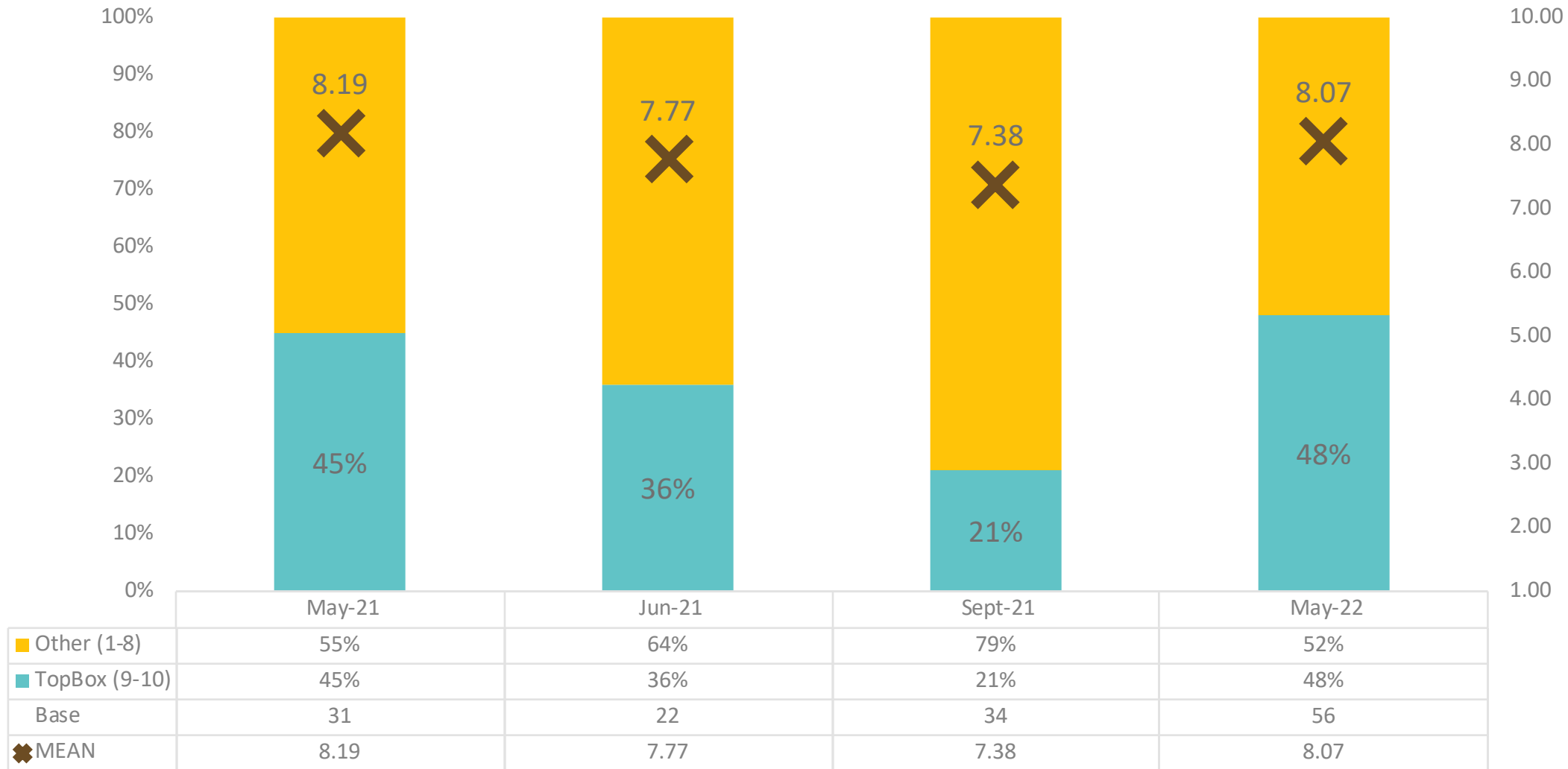
Caution
small
base

| | May-21 | Jun-21 | Sept-21 | May-22 |
|---------------|--------|--------|---------|--------|
| Other (1-8) | 52% | 50% | 32% | 41% |
| TopBox (9-10) | 48% | 50% | 68% | 59% |
| Base | 31 | 22 | 34 | 56 |
| MEAN | 8.32 | 8.45 | 7.62 | 8.59 |

[A]



BRAND LOYALTY – 10PT SCALE



Caution
small
base



GUAM TRAVELER – TRIP MOTIVATIONS

| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|---|----------|-----------|-----------|----------|
| BASE | 31 | 22 | 34 | 56 |
| <i>Relaxation</i> | 52% | 36% | 47% | 61% |
| <i>Food – quality/ variety/ service</i> | 39% | 41% | 44% | 41% |
| <i>Nature/ natural beauty/ scenery</i> | 58% | 64% | 41% | 63% |
| <i>Beach/ ocean</i> | 45% | 55% | 38% | 59% |
| <i>Safe environment</i> | 45% | 23% | 32% | 75% |
| <i>Weather/ climate/ good atmosphere/ fresh air</i> | 45% | 55% | 26% | 54% |
| <i>Local culture/ people/ music</i> | 23% | 55% | 26% | 50% |
| <i>Sightseeing</i> | 35% | 27% | 26% | 27% |
| <i>Feeling the Hafa Adai spirit</i> | 23% | 36% | 26% | 41% |
| <i>Hotel/ accommodations</i> | 23% | 23% | 26% | 36% |
| <i>Variety of activities</i> | 29% | 32% | 21% | 32% |
| <i>Overall customer service</i> | 35% | 23% | 21% | 36% |
| <i>Event- I observed or participated in</i> | 29% | 18% | 18% | 20% |
| <i>Shopping</i> | 26% | 18% | 15% | 30% |



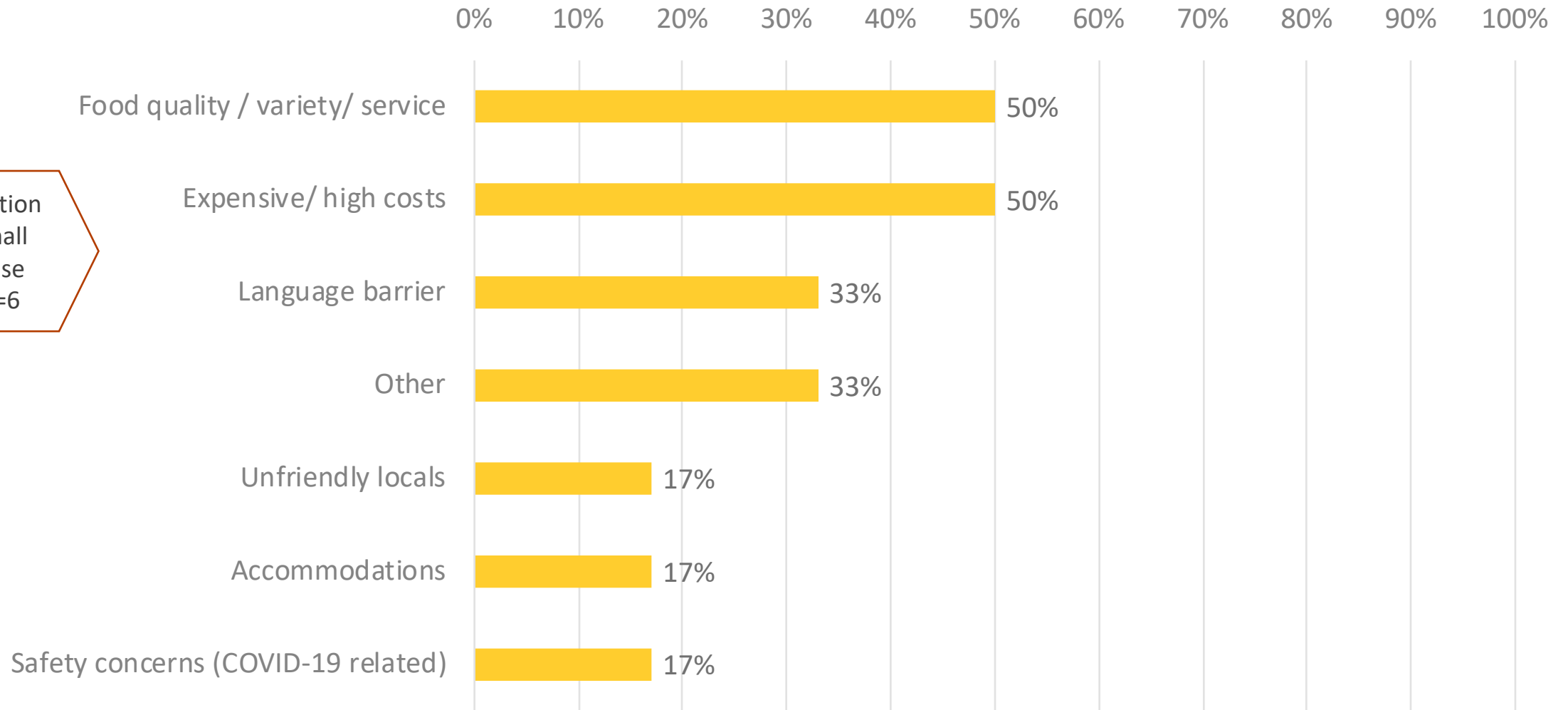
GUAM TRAVELERS – DRAWBACKS

| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|--|----------|-----------|-----------|----------|
| BASE | 31 | 22 | 34 | 56 |
| <i>No negatives</i> | 32% | 32% | 26% | 30% |
| <i>Language barrier/ communication</i> | 19% | 23% | 24% | 21% |
| <i>Safety - COVID</i> | 10% | 9% | 21% | 21% |
| <i>Immigration</i> | 10% | 18% | 21% | 20% |
| <i>Expensive/ high costs</i> | 16% | 23% | 12% | 18% |
| <i>Limited availability of ground transportation</i> | 23% | 18% | 15% | 16% |
| <i>Accommodations</i> | 3% | 14% | 15% | 13% |
| <i>Food – quality/ variety/ service</i> | 16% | 5% | - | 11% |
| <i>Safety - Other</i> | 10% | 9% | 9% | 7% |
| <i>Lack of activities/ attractions</i> | 13% | 5% | 15% | 5% |
| <i>Unfriendly locals</i> | 10% | 5% | 9% | 5% |



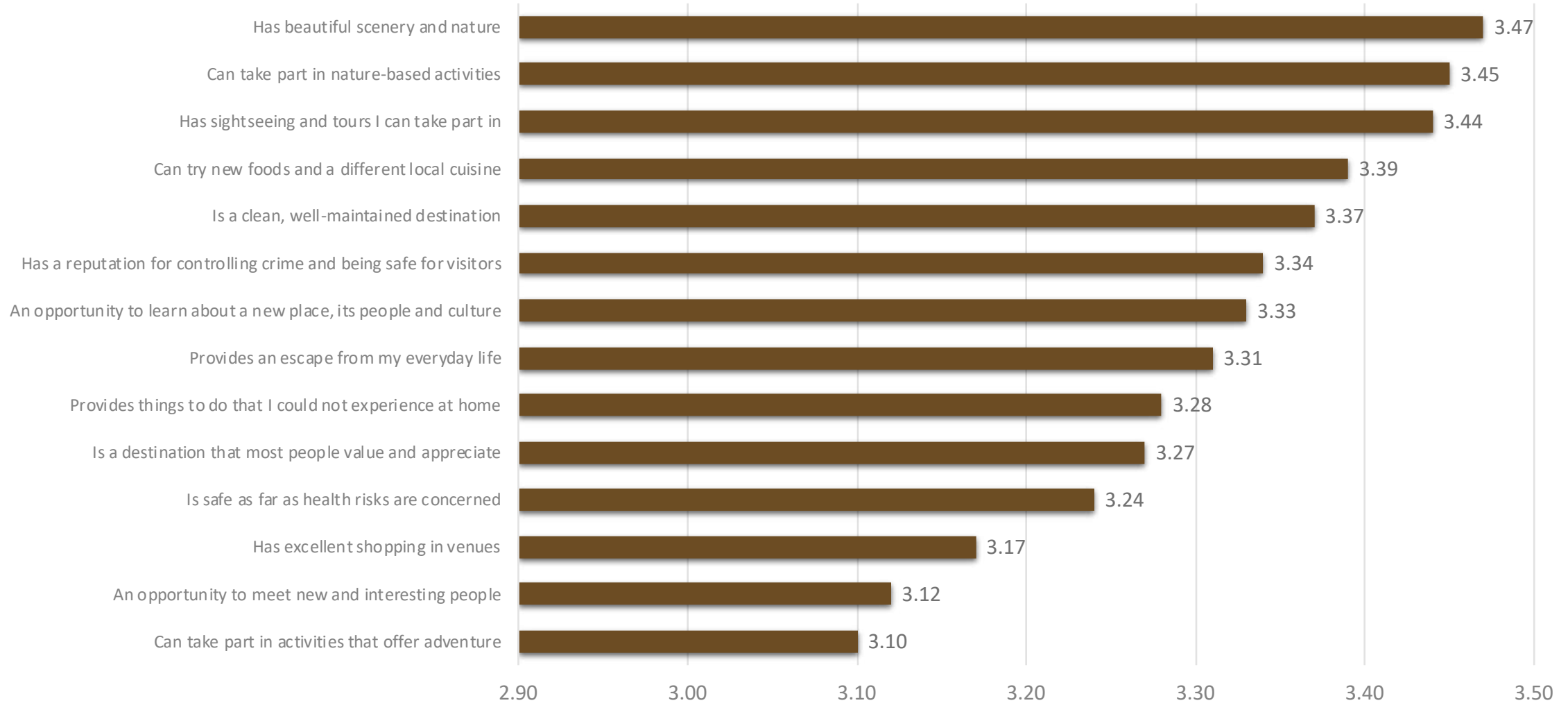
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=6

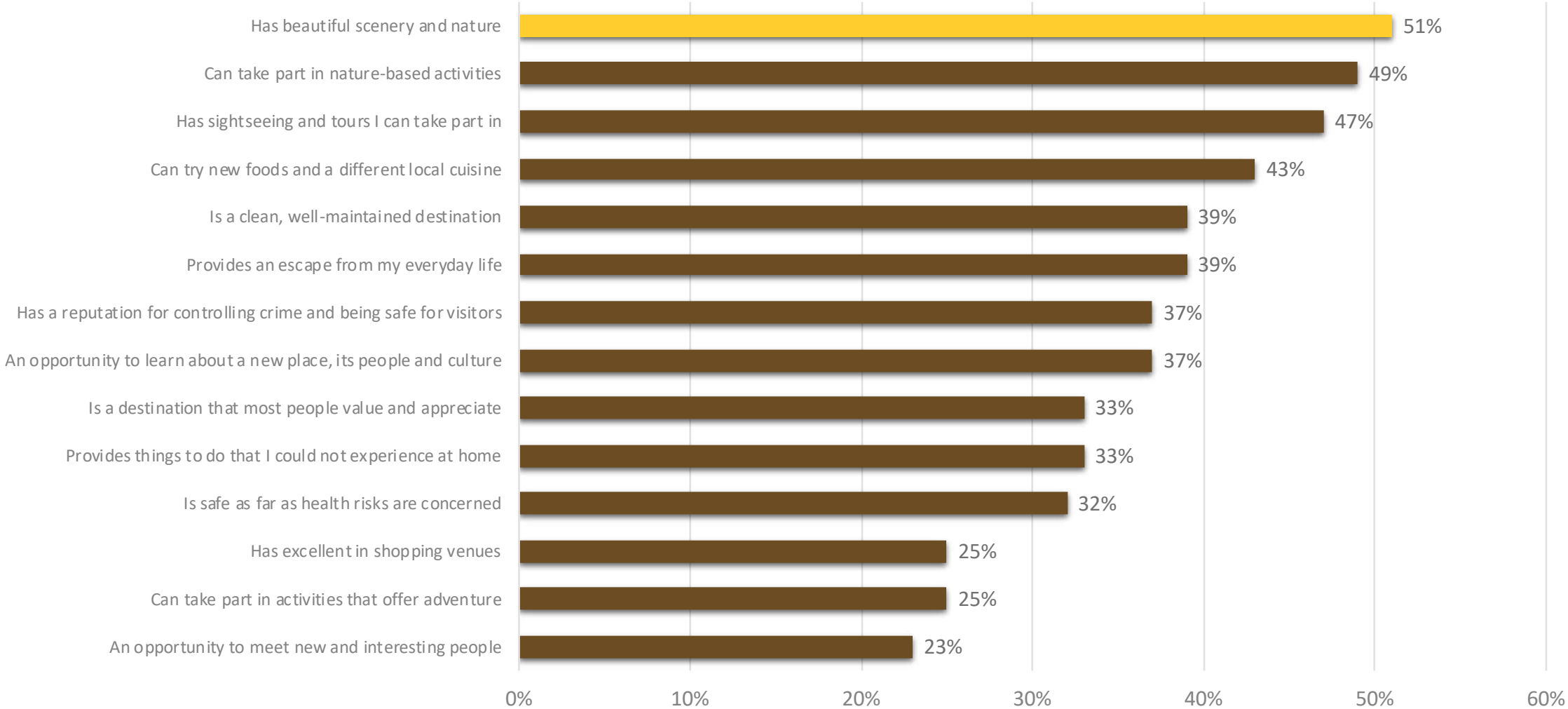


SELECTION FACTORS – SATISFACTION

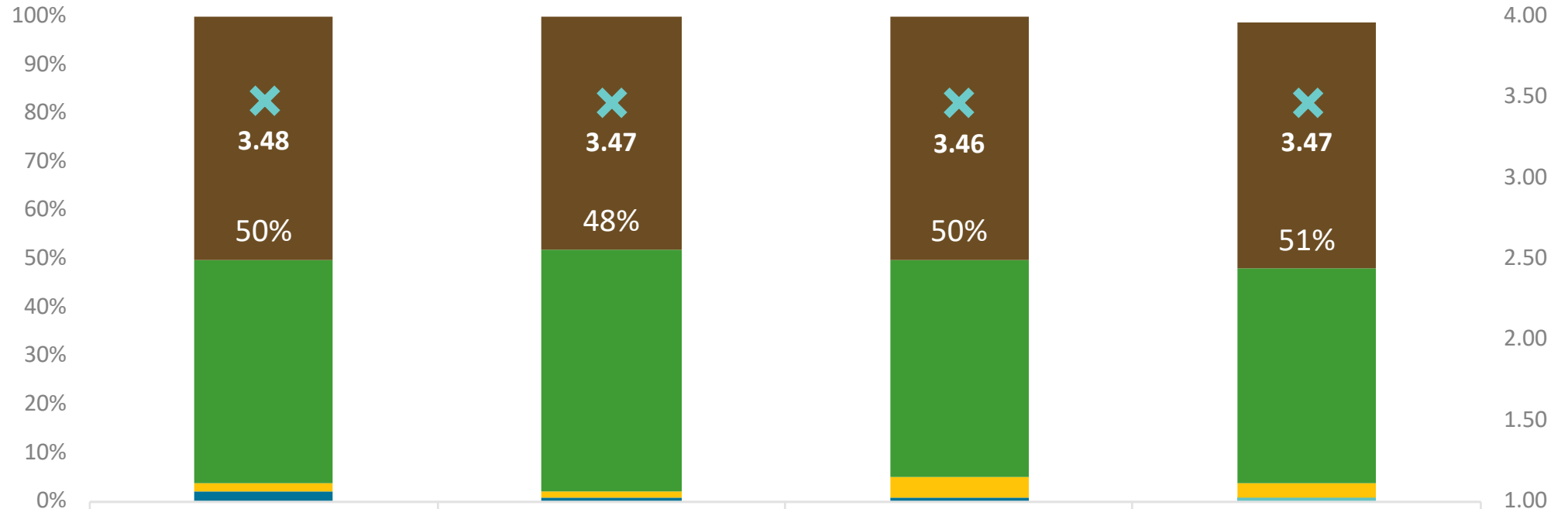
MEAN SCORES 4PT SCALE



SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)

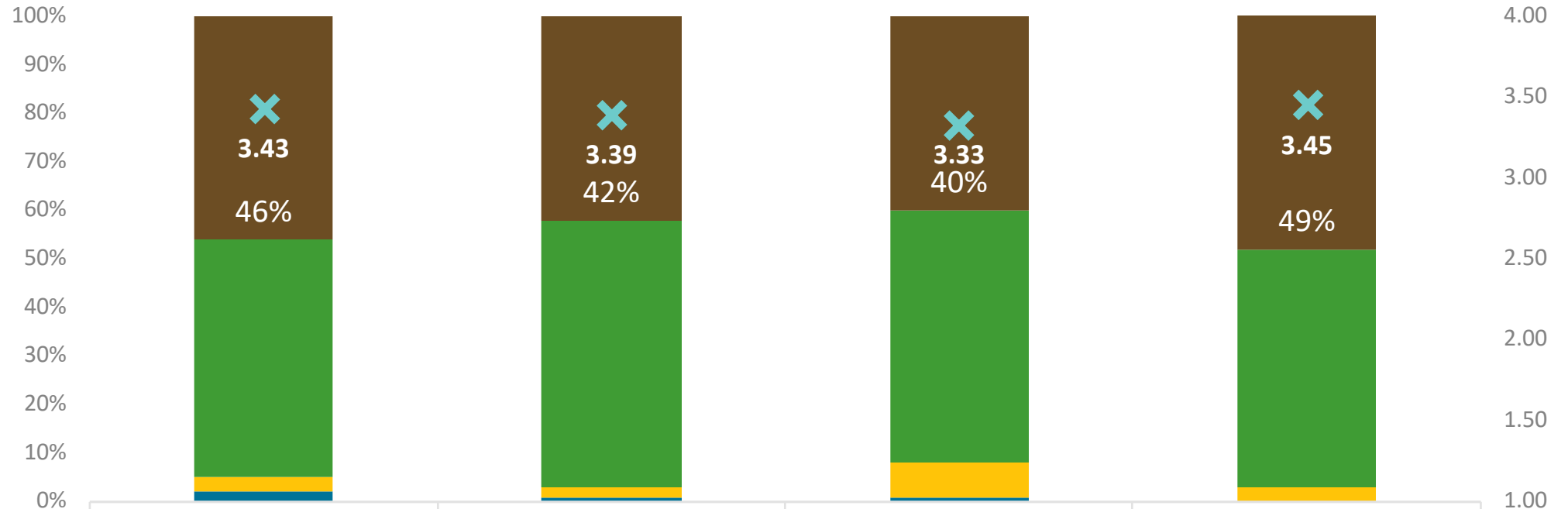


Has beautiful scenery and nature



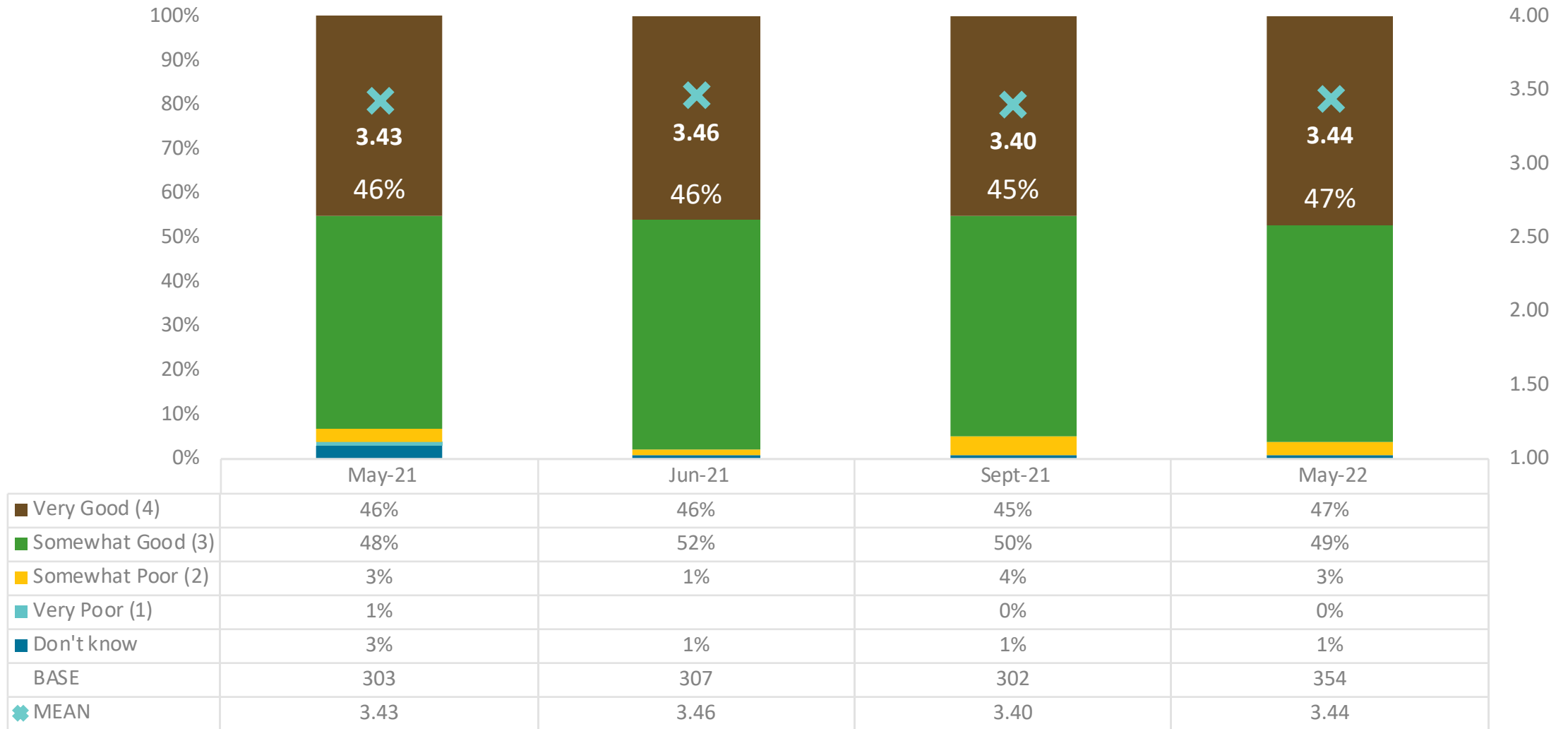
| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 50% | 48% | 50% | 51% |
| Somewhat Good (3) | 46% | 50% | 45% | 44% |
| Somewhat Poor (2) | 2% | 1% | 4% | 3% |
| Very Poor (1) | 0% | 0% | 0% | 1% |
| Don't know | 2% | 1% | 1% | 0% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.48 | 3.47 | 3.46 | 3.47 |

Can take part in nature-based activities

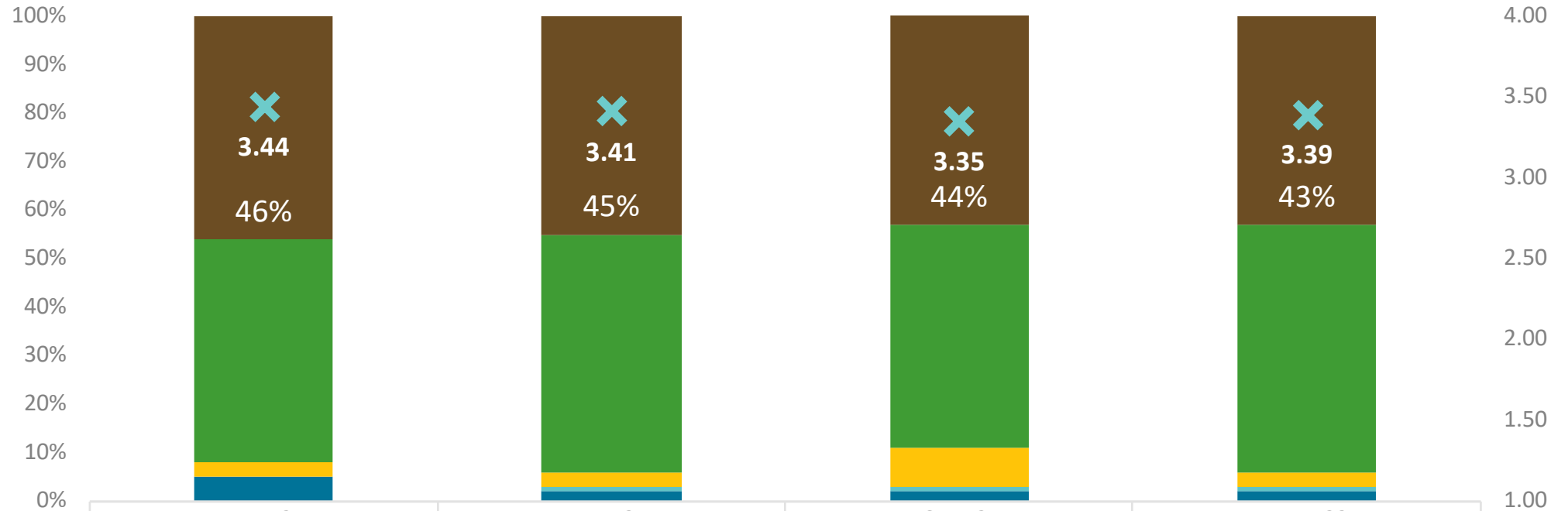


| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 46% | 42% | 40% | 49% |
| Somewhat Good (3) | 49% | 55% | 52% | 49% |
| Somewhat Poor (2) | 3% | 2% | 7% | 3% |
| Very Poor (1) | 0% | 0% | 0% | 0% |
| Don't know | 2% | 1% | 1% | 0% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.43 | 3.39 | 3.33 | 3.45 |

Has sightseeing and tours I can take part in

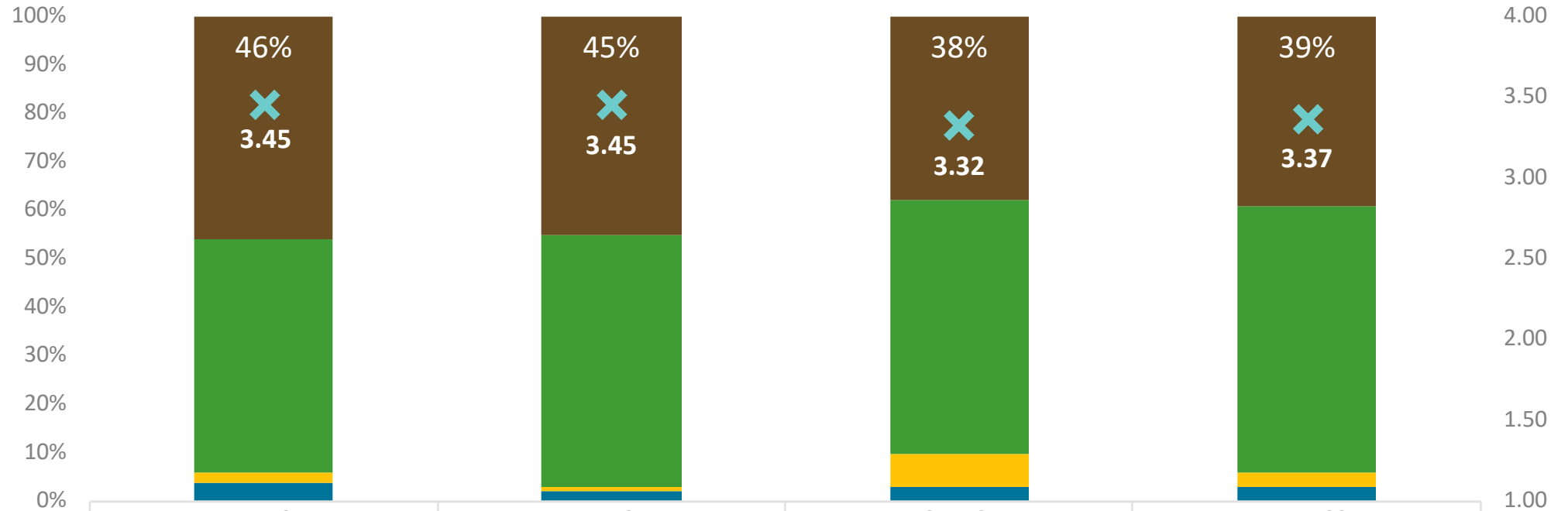


Can try new foods and a different local cuisine



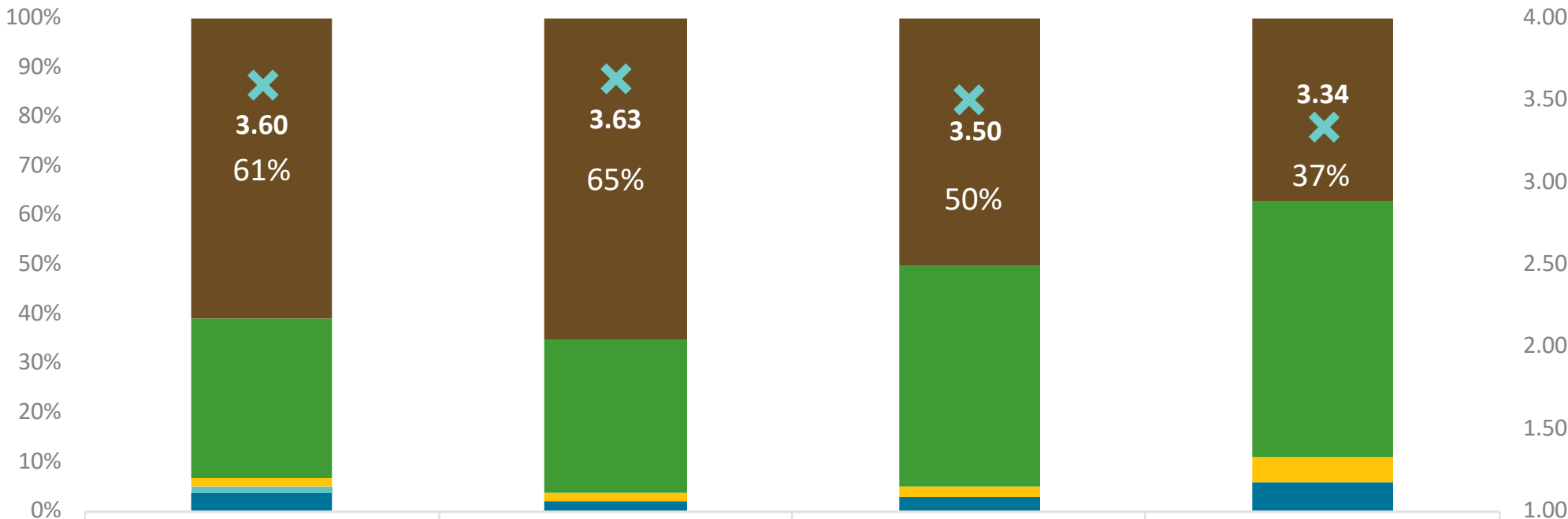
| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 46% | 45% | 44% | 43% |
| Somewhat Good (3) | 46% | 49% | 46% | 51% |
| Somewhat Poor (2) | 3% | 3% | 8% | 3% |
| Very Poor (1) | 0% | 1% | 1% | 1% |
| Don't know | 5% | 2% | 2% | 2% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.44 | 3.41 | 3.35 | 3.39 |

Is a clean, well-maintained destination



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 46% | 45% | 38% | 39% |
| Somewhat Good (3) | 48% | 52% | 52% | 55% |
| Somewhat Poor (2) | 2% | 1% | 7% | 3% |
| Very Poor (1) | 0% | 0% | 0% | 0% |
| Don't know | 4% | 2% | 3% | 3% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.45 | 3.45 | 3.32 | 3.37 |

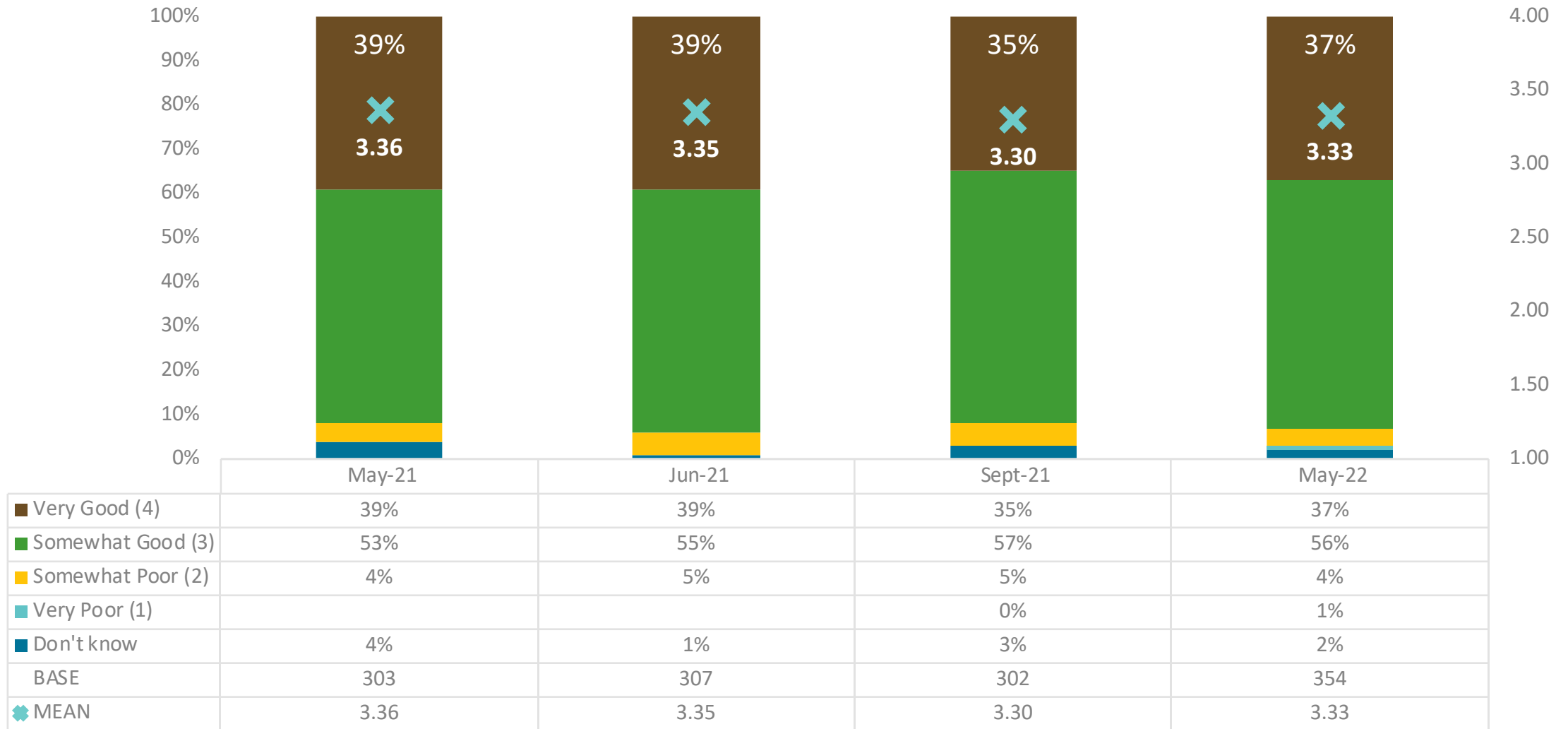
Has a reputation for controlling crime and being safe for visitors



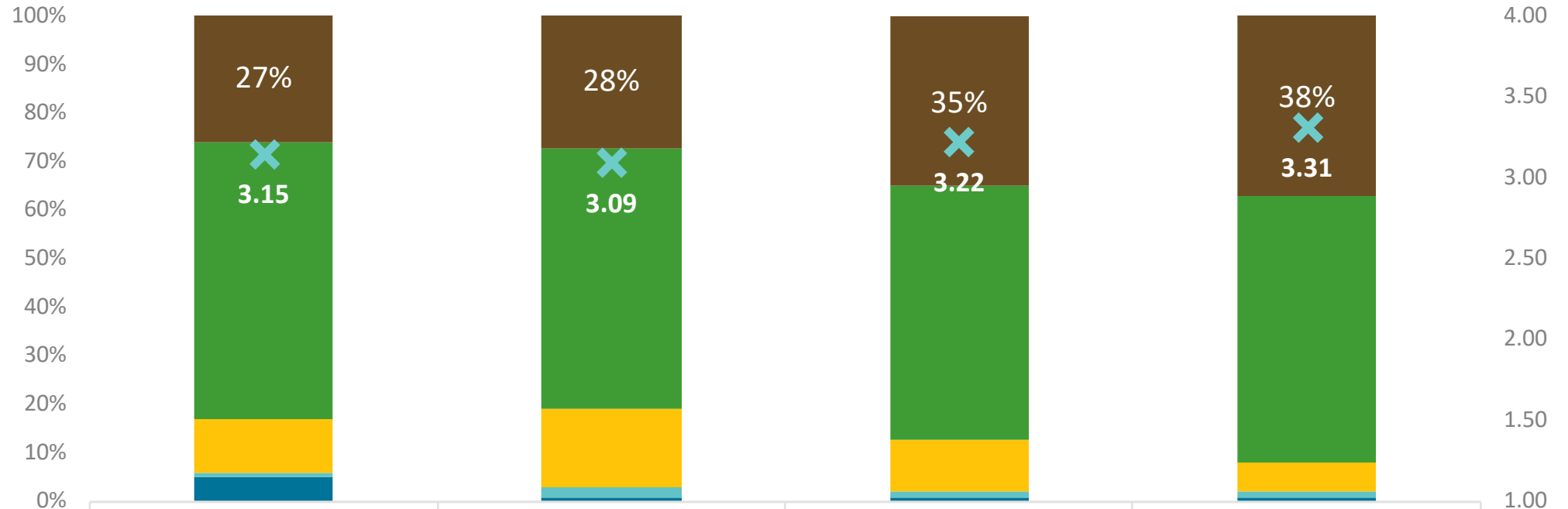
| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 61% | 65% | 50% | 37% |
| Somewhat Good (3) | 32% | 31% | 45% | 52% |
| Somewhat Poor (2) | 2% | 2% | 2% | 5% |
| Very Poor (1) | 1% | 0% | | 0% |
| Don't know | 4% | 2% | 3% | 6% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.60 | 3.63 | 3.50 | 3.34 |



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

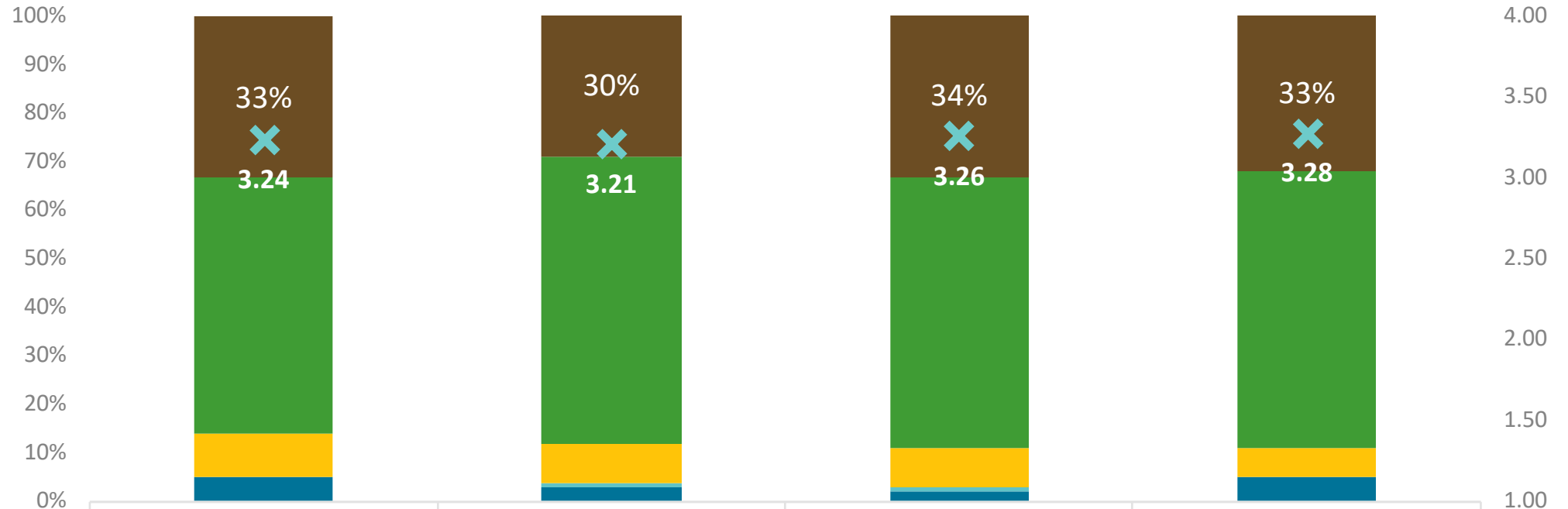


Provides an escape from my everyday life



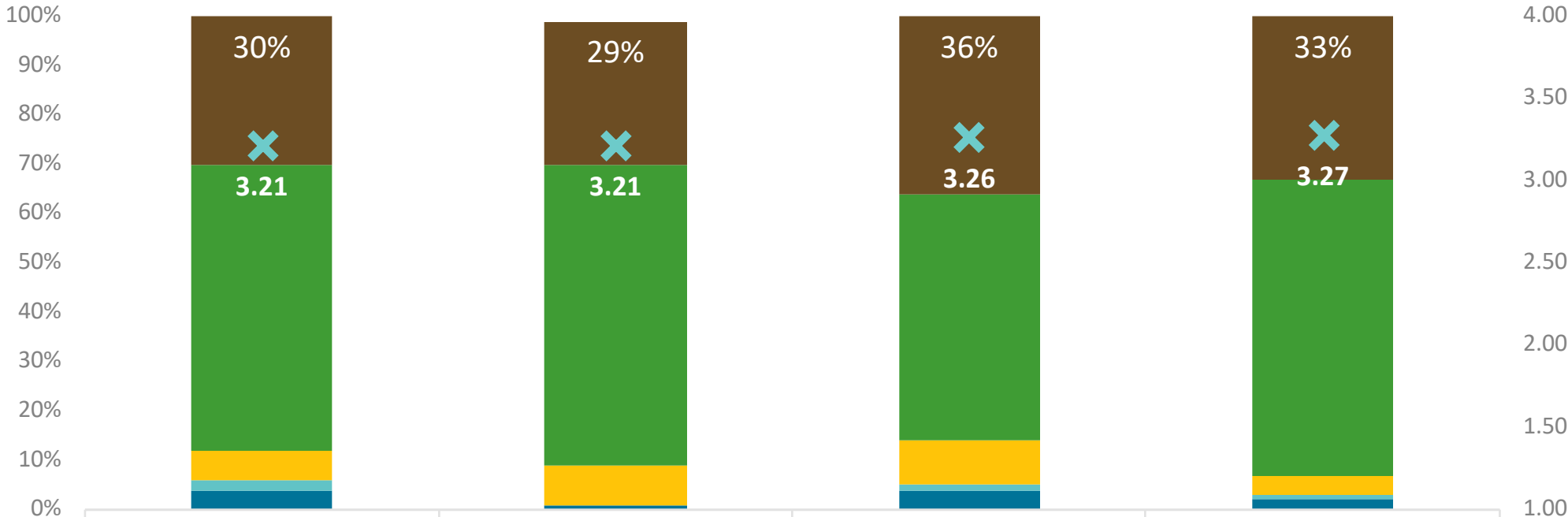
| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 27% | 28% | 35% | 38% |
| Somewhat Good (3) | 57% | 54% | 52% | 55% |
| Somewhat Poor (2) | 11% | 16% | 11% | 6% |
| Very Poor (1) | 1% | 2% | 1% | 1% |
| Don't know | 5% | 1% | 1% | 1% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.15 | 3.09 | 3.22 | 3.31 |

Provides things to do that I could not experience at home



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 33% | 30% | 34% | 33% |
| Somewhat Good (3) | 53% | 59% | 56% | 57% |
| Somewhat Poor (2) | 9% | 8% | 8% | 6% |
| Very Poor (1) | 0% | 1% | 1% | |
| Don't know | 5% | 3% | 2% | 5% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.24 | 3.21 | 3.26 | 3.28 |

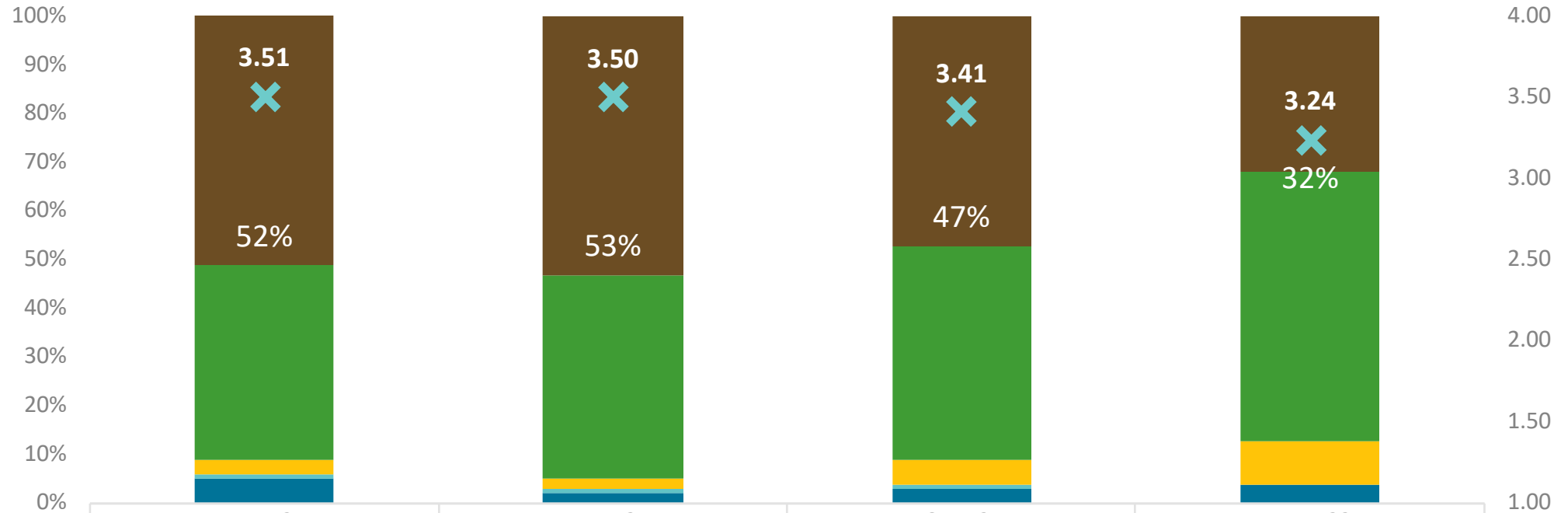
Is a destination that most people value and appreciate



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 30% | 29% | 36% | 33% |
| Somewhat Good (3) | 58% | 61% | 50% | 60% |
| Somewhat Poor (2) | 6% | 8% | 9% | 4% |
| Very Poor (1) | 2% | | 1% | 1% |
| Don't know | 4% | 1% | 4% | 2% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.21 | 3.21 | 3.26 | 3.27 |

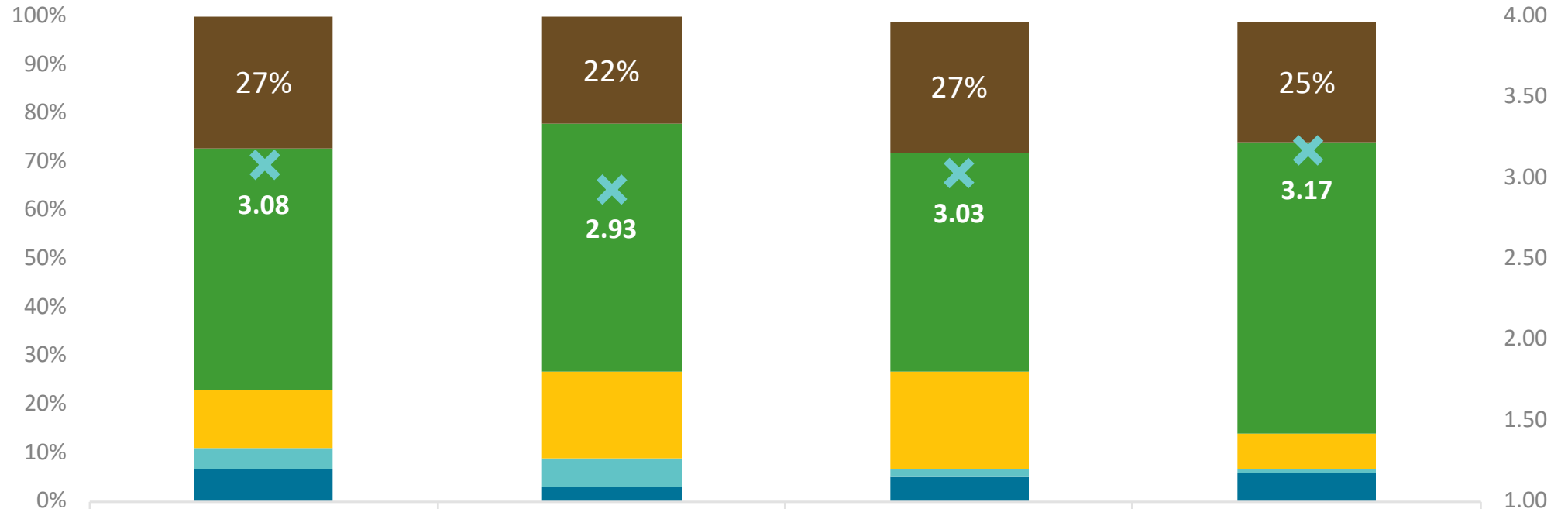


Is safe as far as health risks are concerned



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 52% | 53% | 47% | 32% |
| Somewhat Good (3) | 40% | 42% | 44% | 55% |
| Somewhat Poor (2) | 3% | 2% | 5% | 9% |
| Very Poor (1) | 1% | 1% | 1% | 0% |
| Don't know | 5% | 2% | 3% | 4% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.51 | 3.50 | 3.41 | 3.24 |

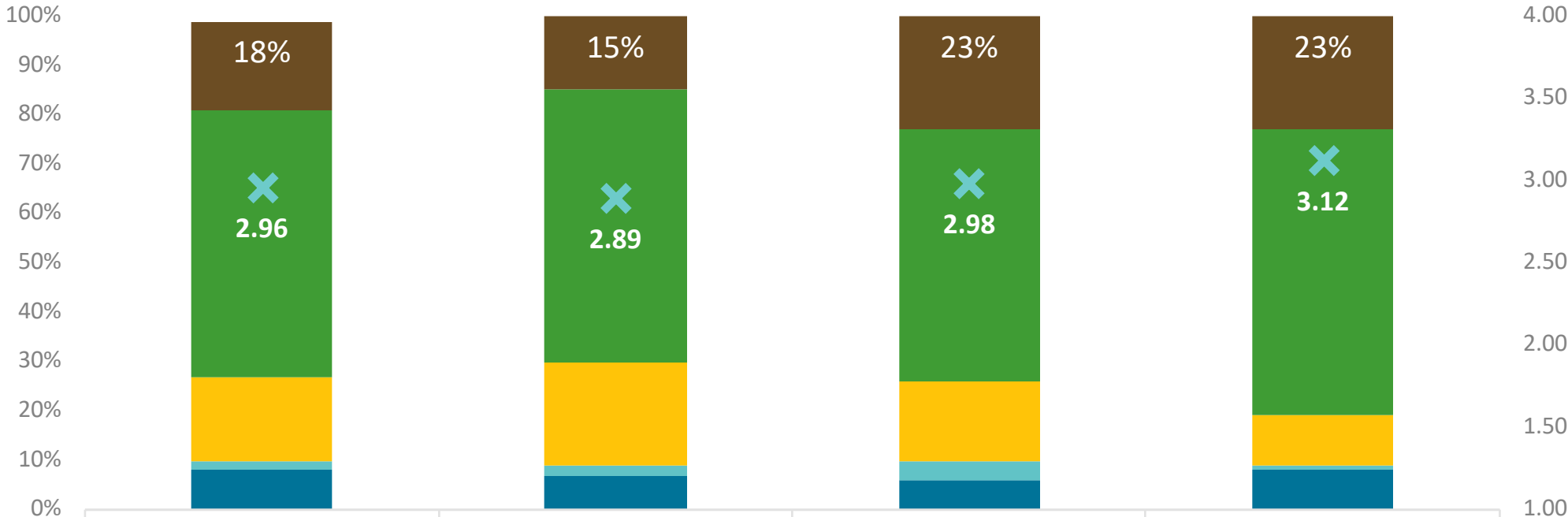
Has excellent shopping in venues



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 27% | 22% | 27% | 25% |
| Somewhat Good (3) | 50% | 51% | 45% | 60% |
| Somewhat Poor (2) | 12% | 18% | 20% | 7% |
| Very Poor (1) | 4% | 6% | 2% | 1% |
| Don't know | 7% | 3% | 5% | 6% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 3.08 | 2.93 | 3.03 | 3.17 |



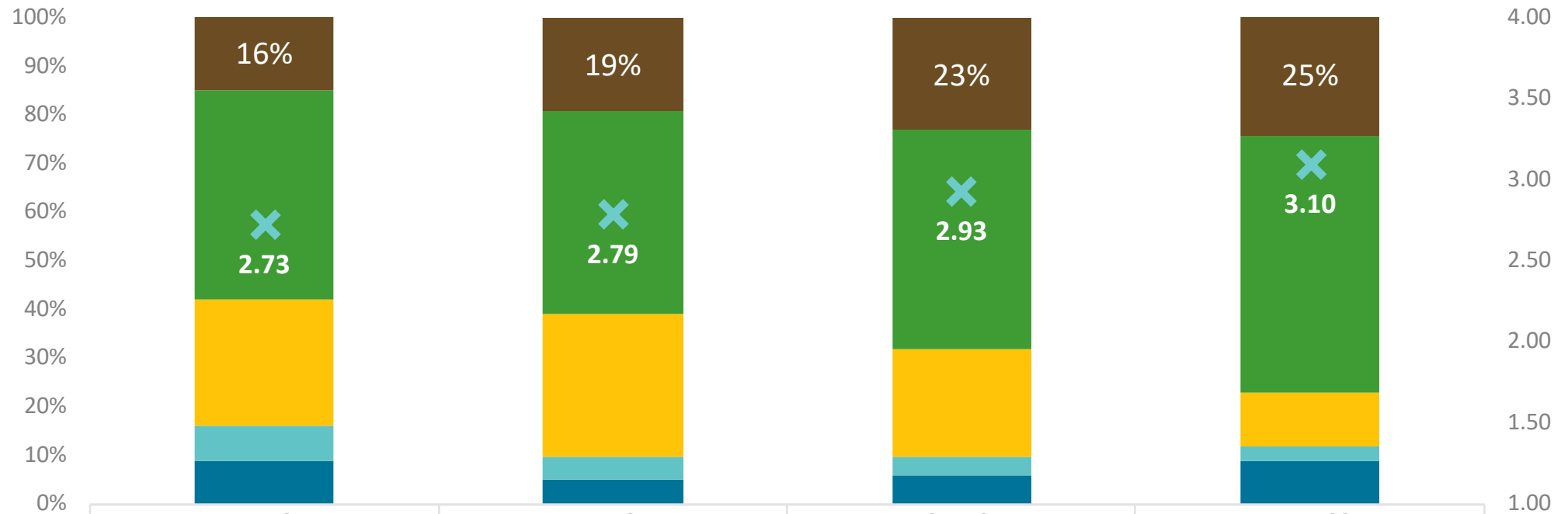
An opportunity to meet new and interesting people



| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 18% | 15% | 23% | 23% |
| Somewhat Good (3) | 54% | 55% | 51% | 58% |
| Somewhat Poor (2) | 17% | 21% | 16% | 10% |
| Very Poor (1) | 2% | 2% | 4% | 1% |
| Don't know | 8% | 7% | 6% | 8% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 2.96 | 2.89 | 2.98 | 3.12 |



Can take part in activities that offer adventure

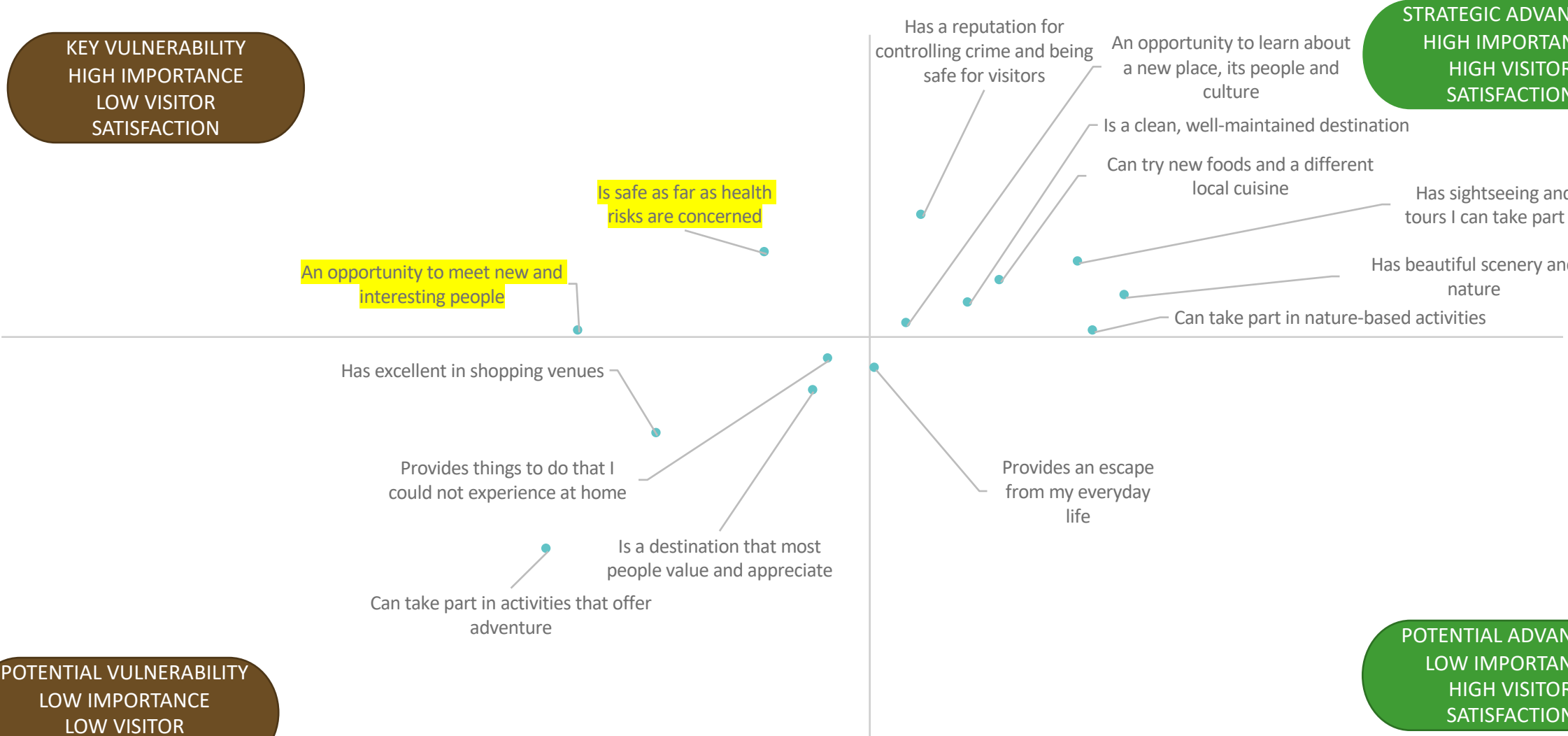


| | May-21 | Jun-21 | Sept-21 | May-22 |
|-------------------|--------|--------|---------|--------|
| Very Good (4) | 16% | 19% | 23% | 25% |
| Somewhat Good (3) | 43% | 42% | 45% | 53% |
| Somewhat Poor (2) | 26% | 29% | 22% | 11% |
| Very Poor (1) | 7% | 5% | 4% | 3% |
| Don't know | 9% | 5% | 6% | 9% |
| BASE | 303 | 307 | 302 | 354 |
| MEAN | 2.73 | 2.79 | 2.93 | 3.10 |

NEED-GAP ANALYSIS

KEY VULNERABILITY
HIGH IMPORTANCE
LOW VISITOR
SATISFACTION

STRATEGIC ADVANTAGE
HIGH IMPORTANCE
HIGH VISITOR
SATISFACTION



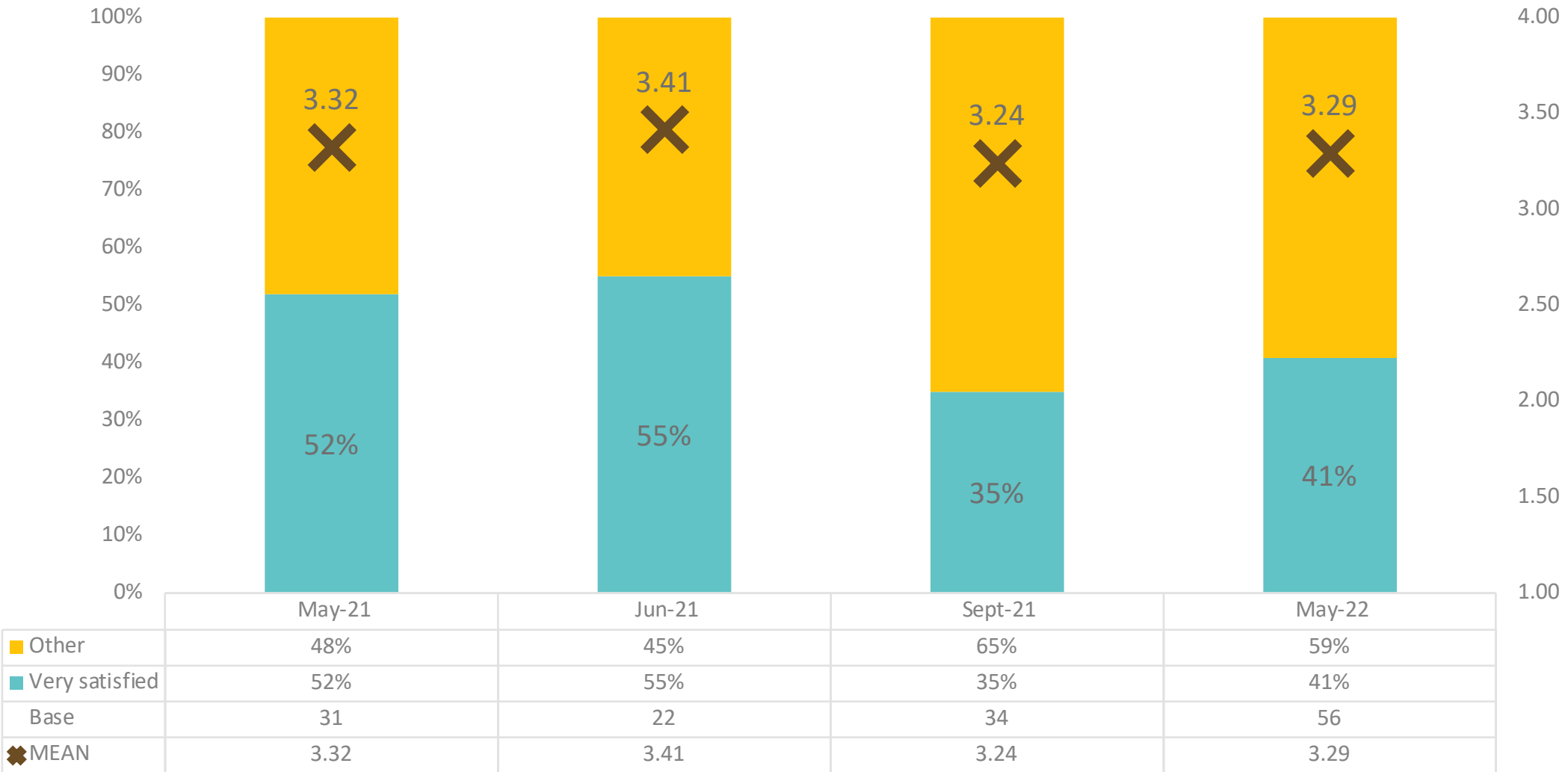
POTENTIAL VULNERABILITY
LOW IMPORTANCE
LOW VISITOR
SATISFACTION

POTENTIAL ADVANTAGE
LOW IMPORTANCE
HIGH VISITOR
SATISFACTION



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

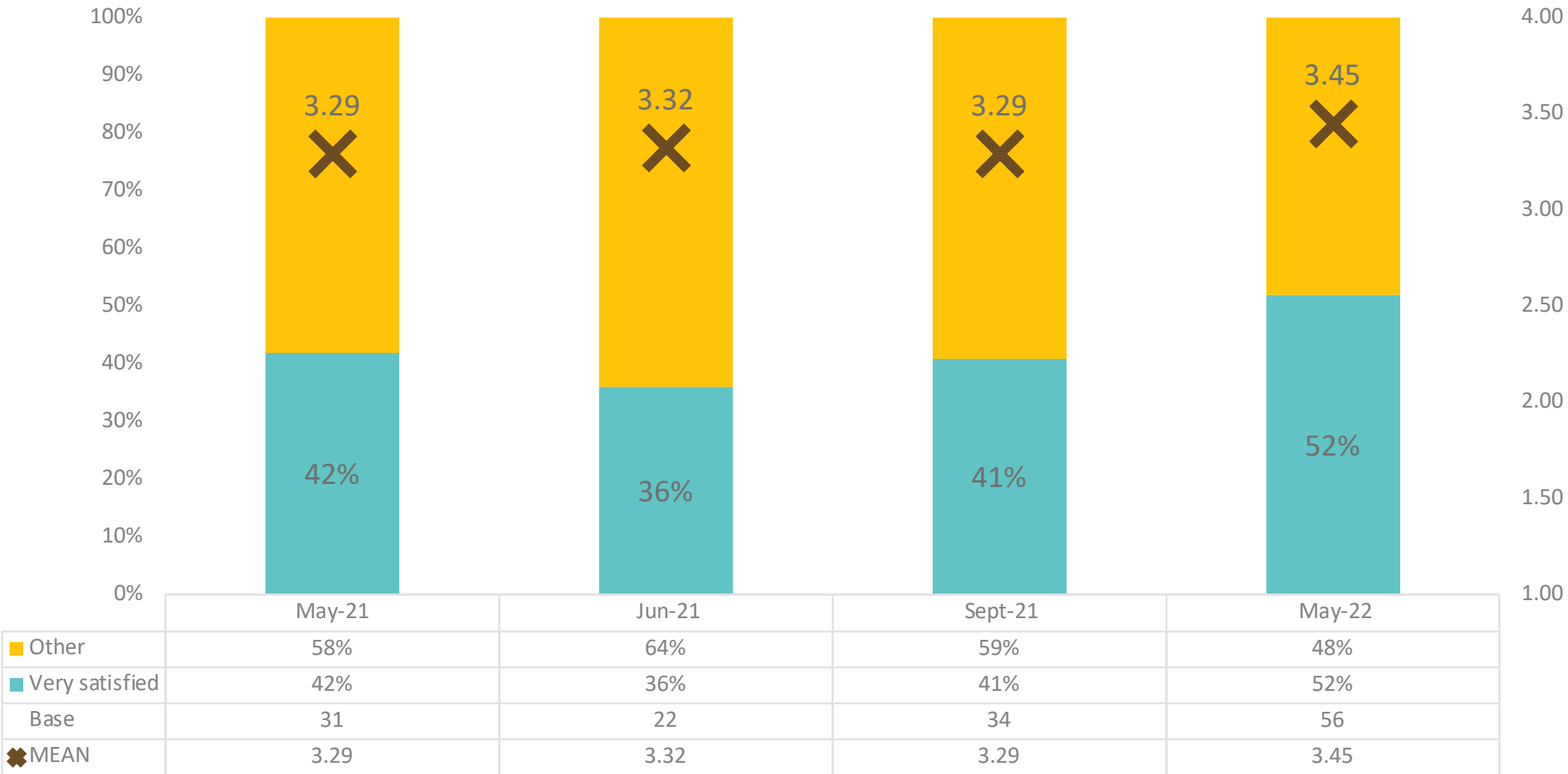


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

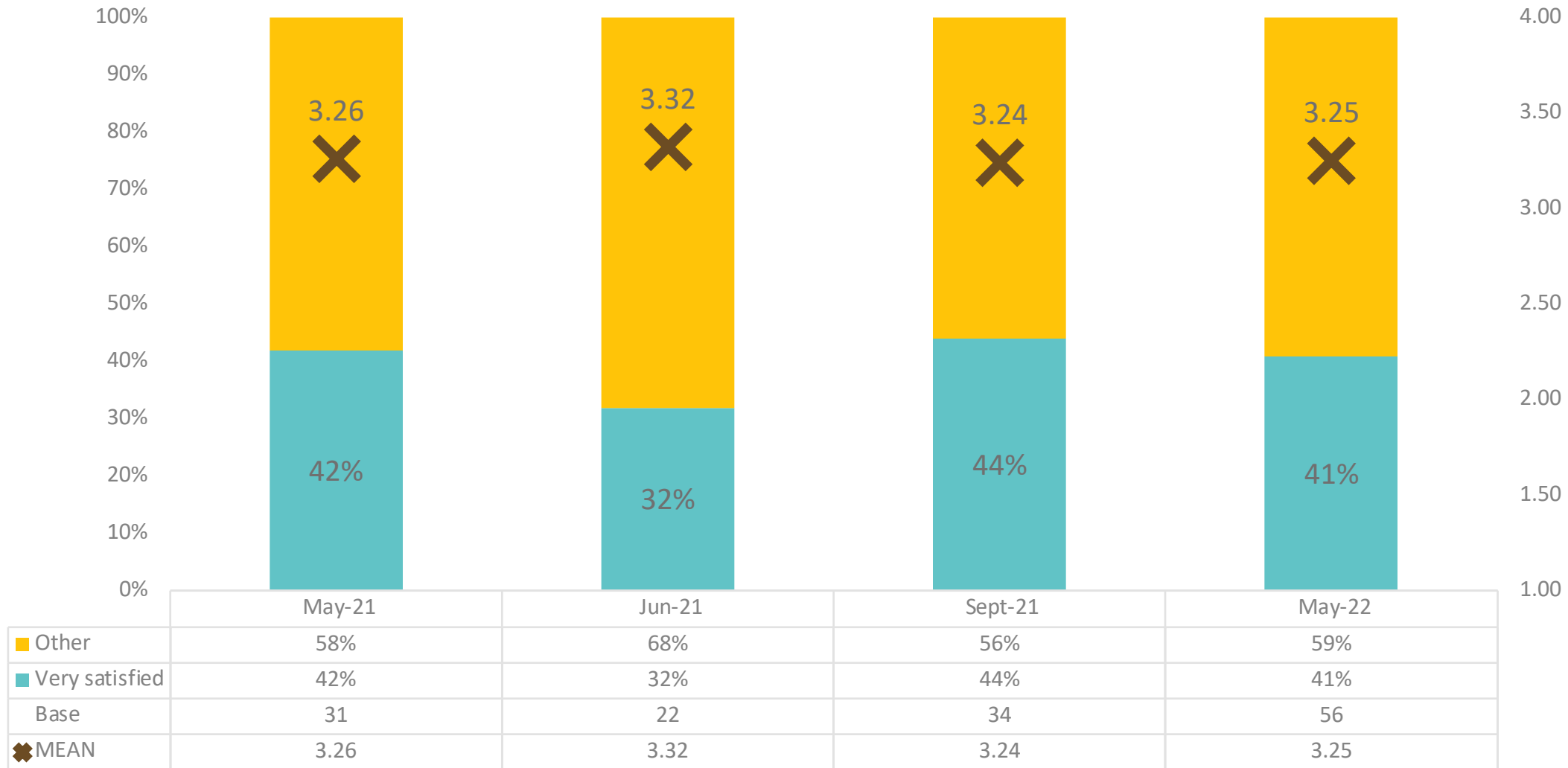


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

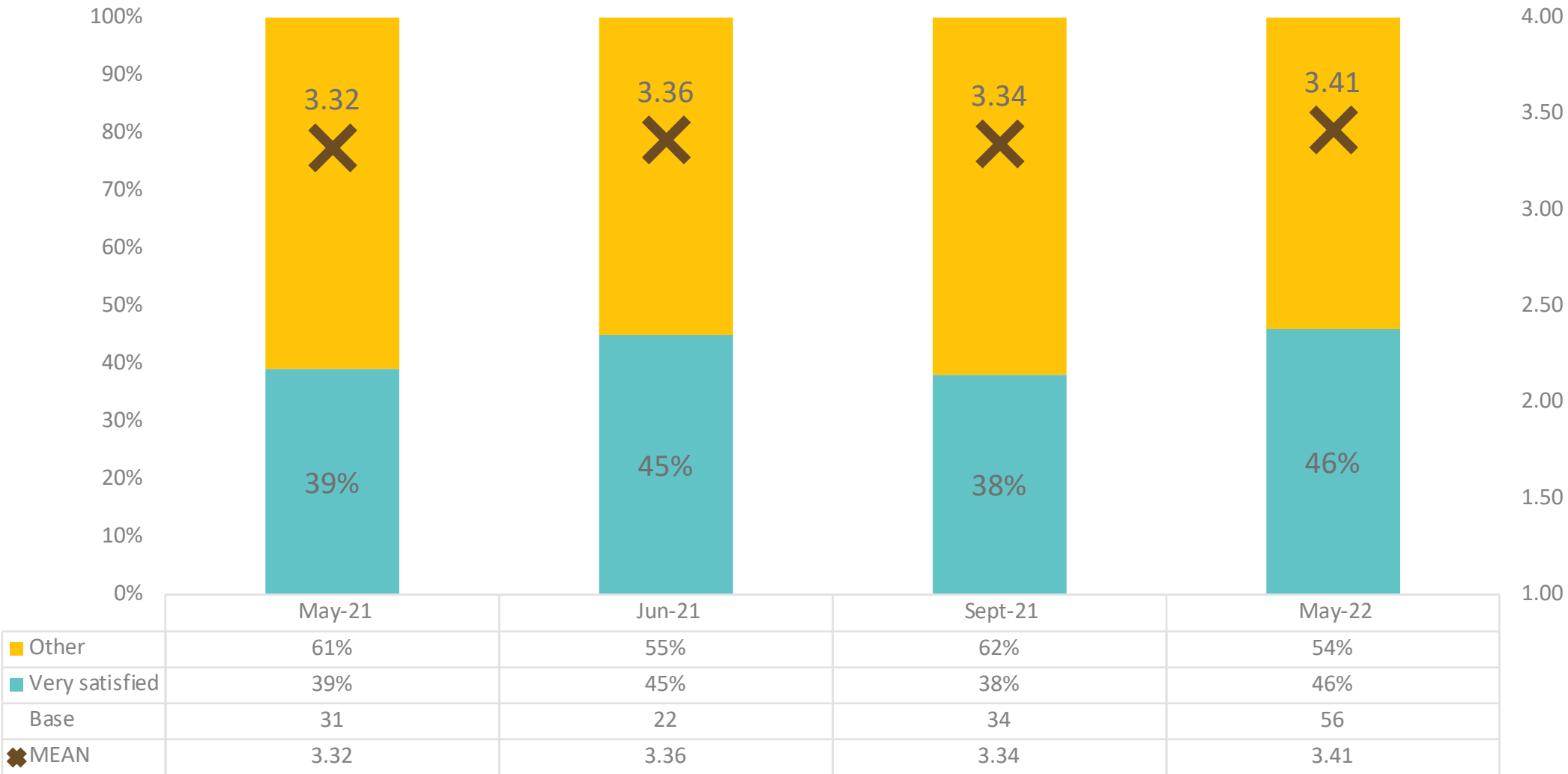
4PT RATING SCALE



Caution
small
base

VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

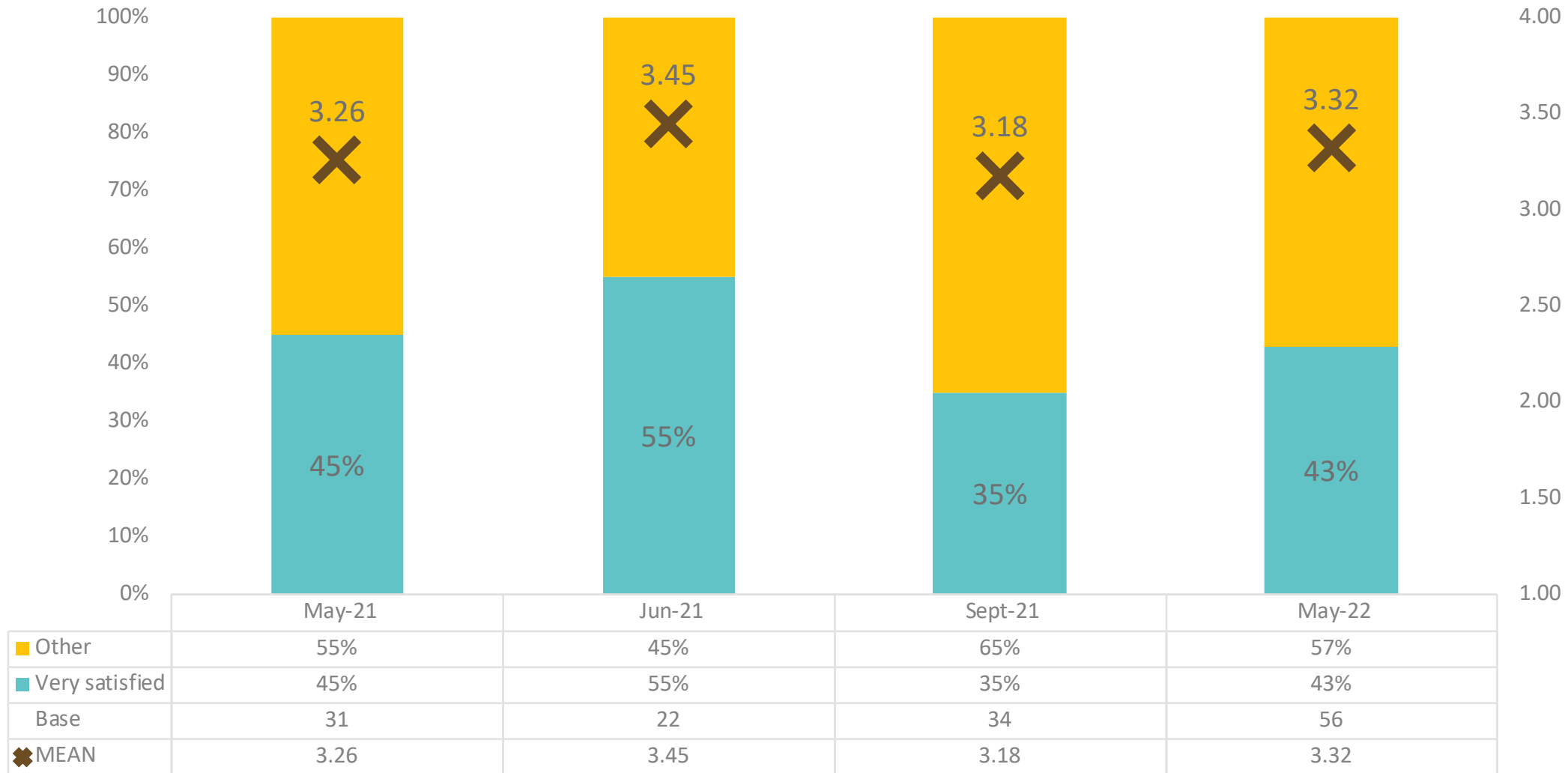


Caution
small
base



VARIETY OF ACTIVITIES – SATISFACTION

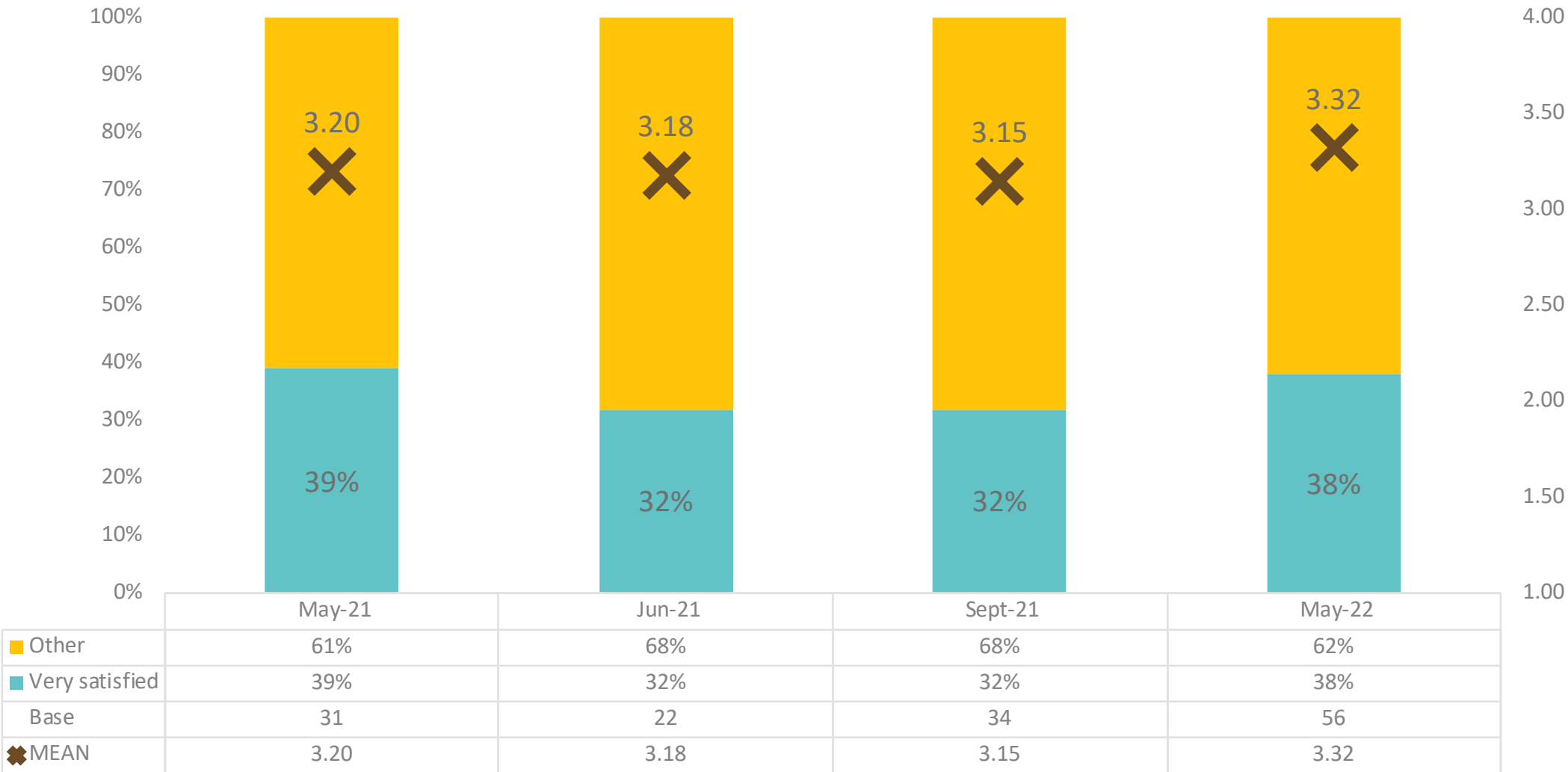
4PT RATING SCALE



Caution
small
base

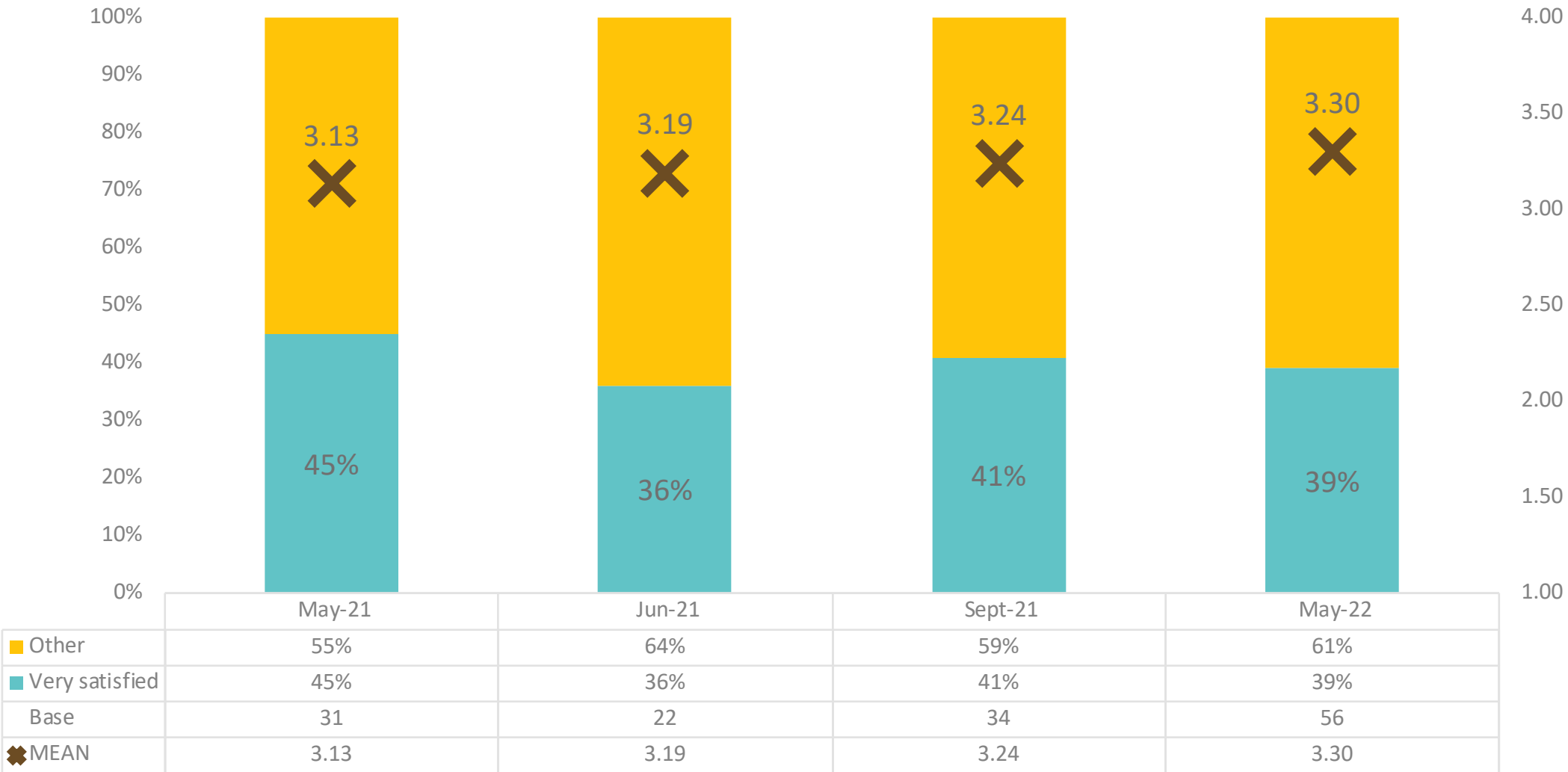
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE



OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



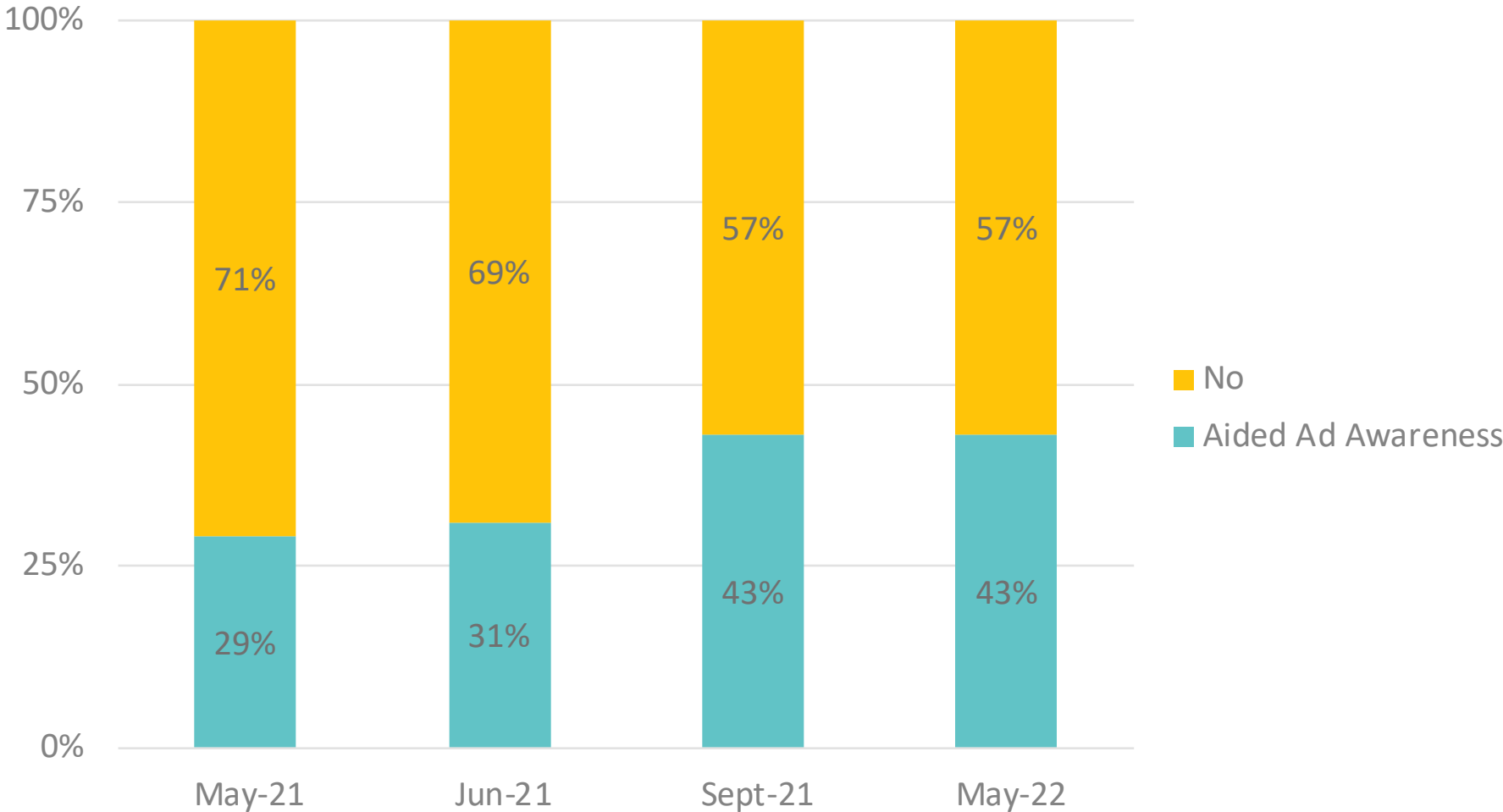


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

| | May 2021 | June 2021 | Sept 2021 | May 2022 |
|--|----------|-----------|-----------|----------|
| BASE | 31 | 22 | 34 | 56 |
| <i>Travel guide website</i> | 29% | 32% | 21% | 16% |
| <i>Social media</i> | 29% | 23% | 21% | 25% |
| <i>Television</i> | 19% | 9% | 18% | 7% |
| <i>Recommendations – friends/ family</i> | 10% | 18% | 18% | 20% |
| <i>GVB website</i> | 10% | 9% | 15% | 16% |
| <i>Radio</i> | - | 5% | 6% | 2% |
| <i>Travel agent</i> | 3% | 5% | 3% | 5% |





SECTION 5

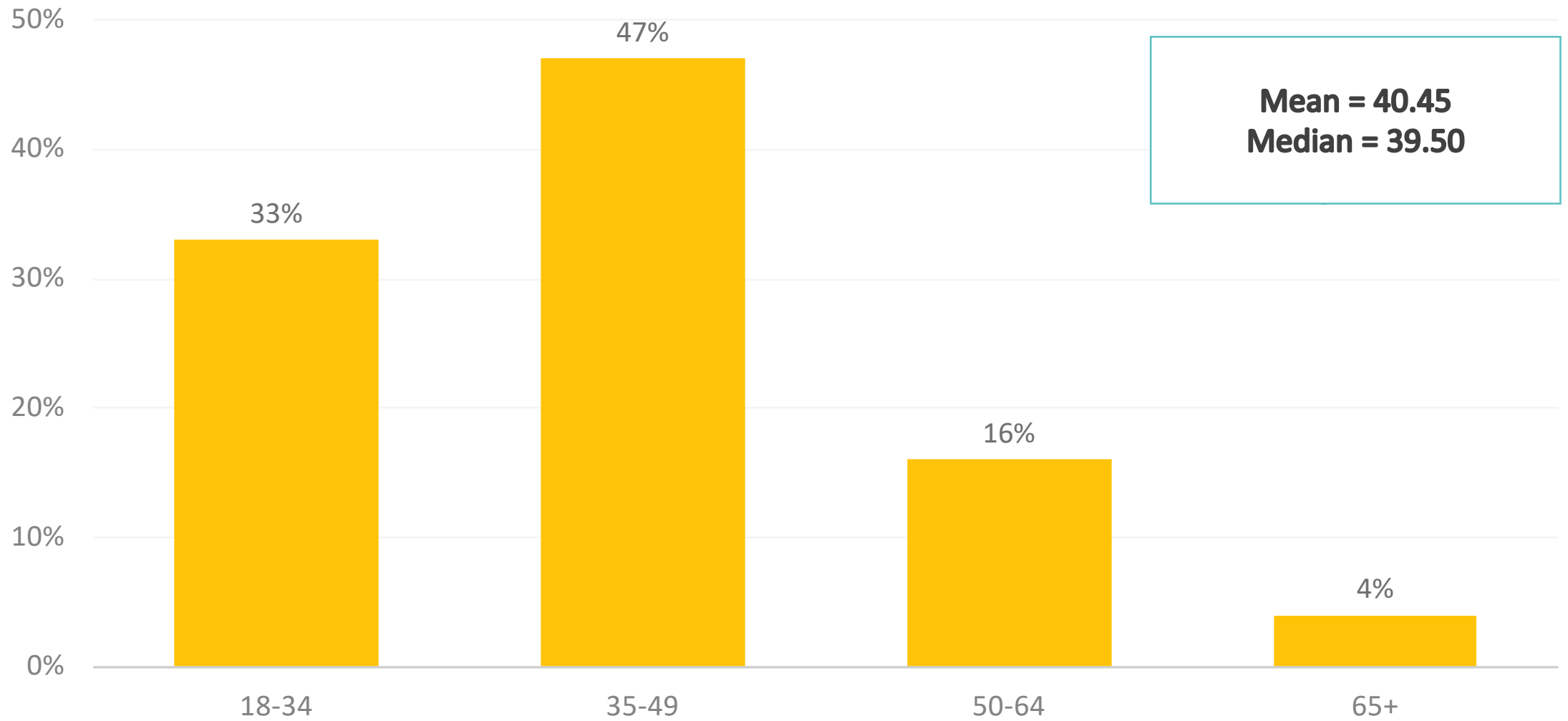
PROFILE OF RESPONDENTS



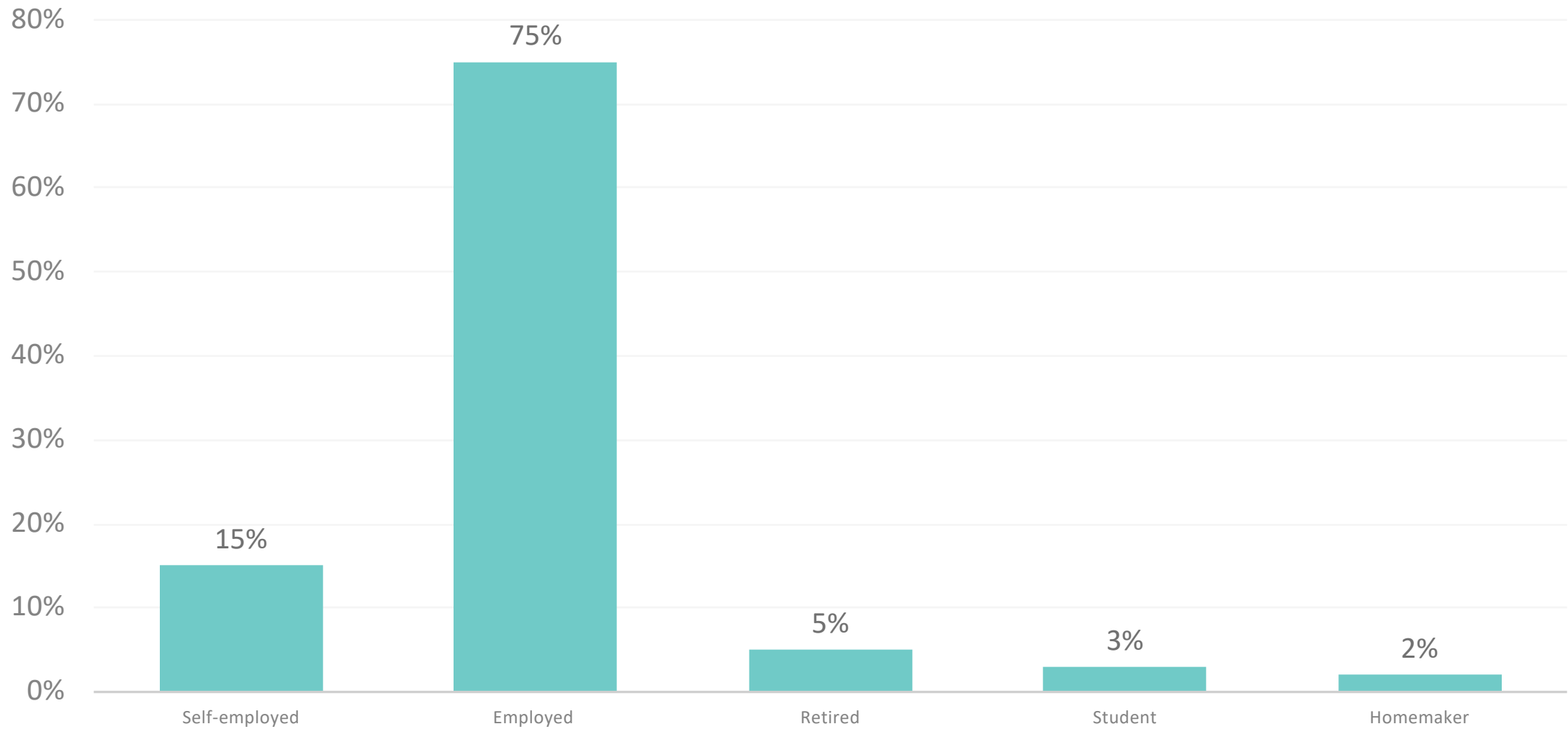
GENDER



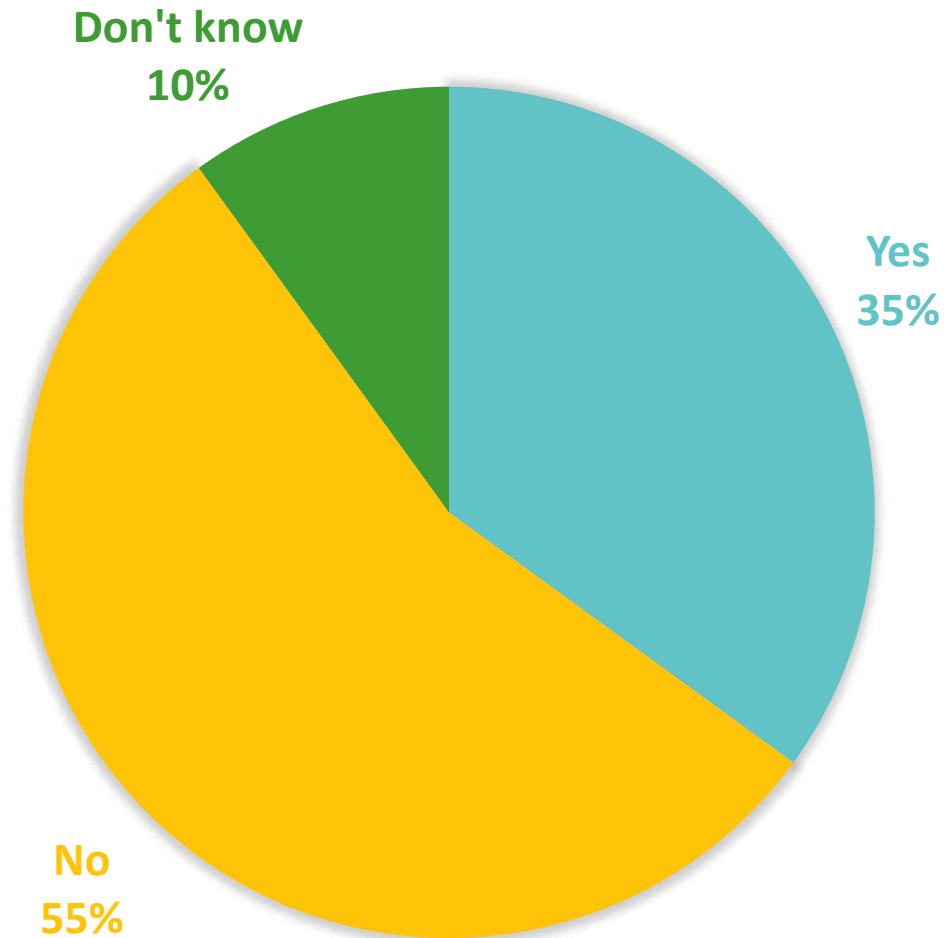
AGE



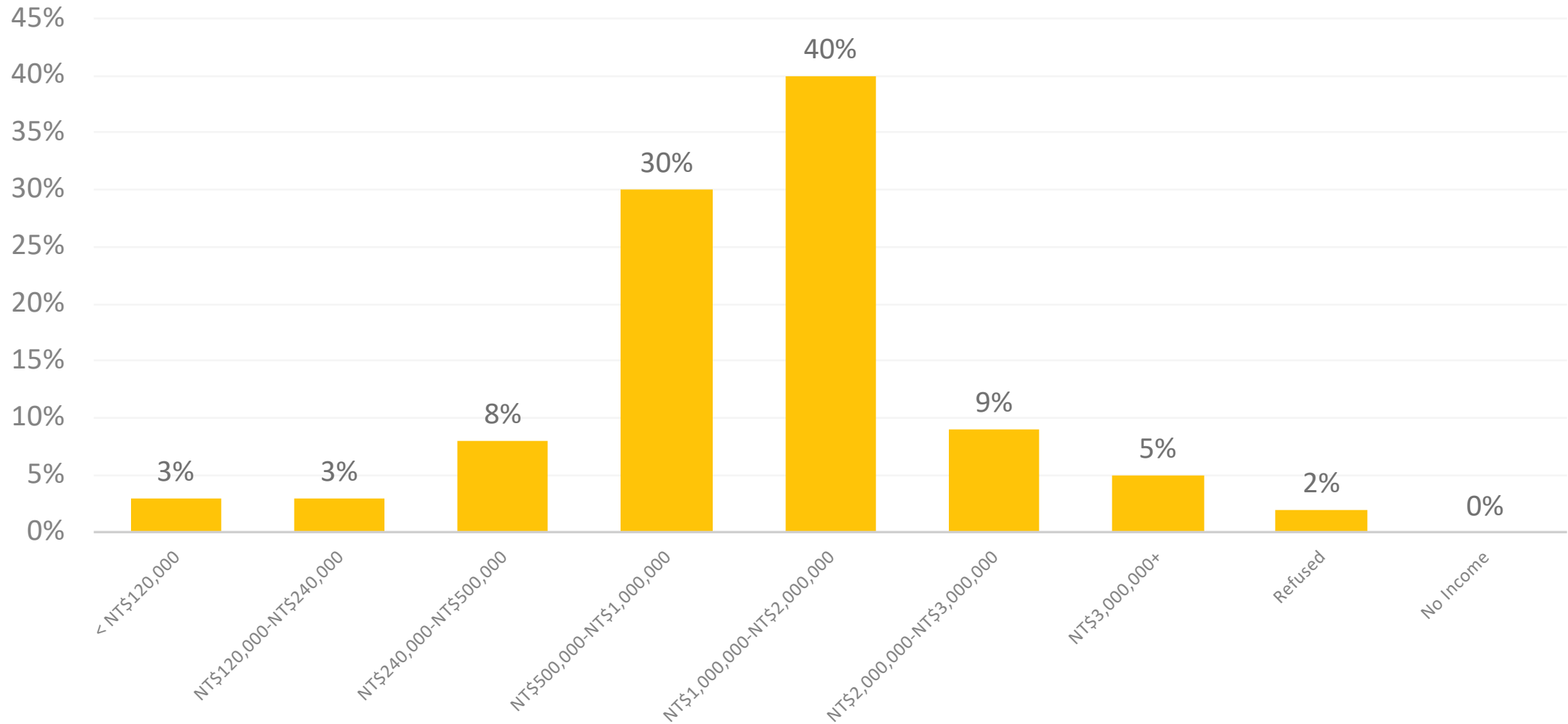
EMPLOYMENT STATUS



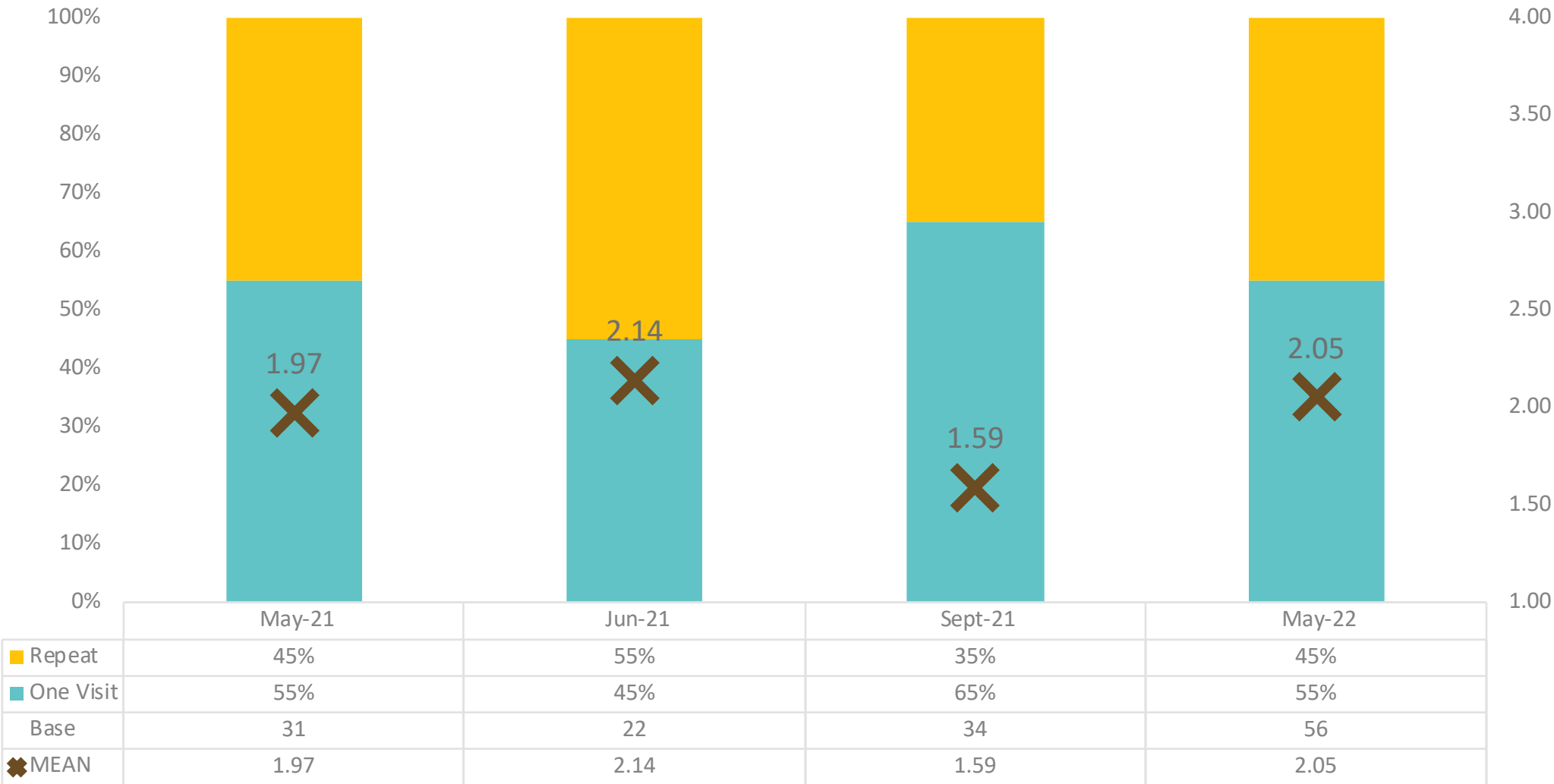
INCENTIVE TRIPS



HOUSEHOLD INCOME



TRIPS TO GUAM



Caution
small
base

Q: You indicated you have visited Guam at least once in the past five years. How many trips have you made to Guam total?



INTERNATIONAL TRAVEL – Trips in last five years

