

Guam Visitors Bureau

Japan Visitor Tracker Exit Profile & Market Segmentation Report

FY2017

AUGUST 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 **348** 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 **348** 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.

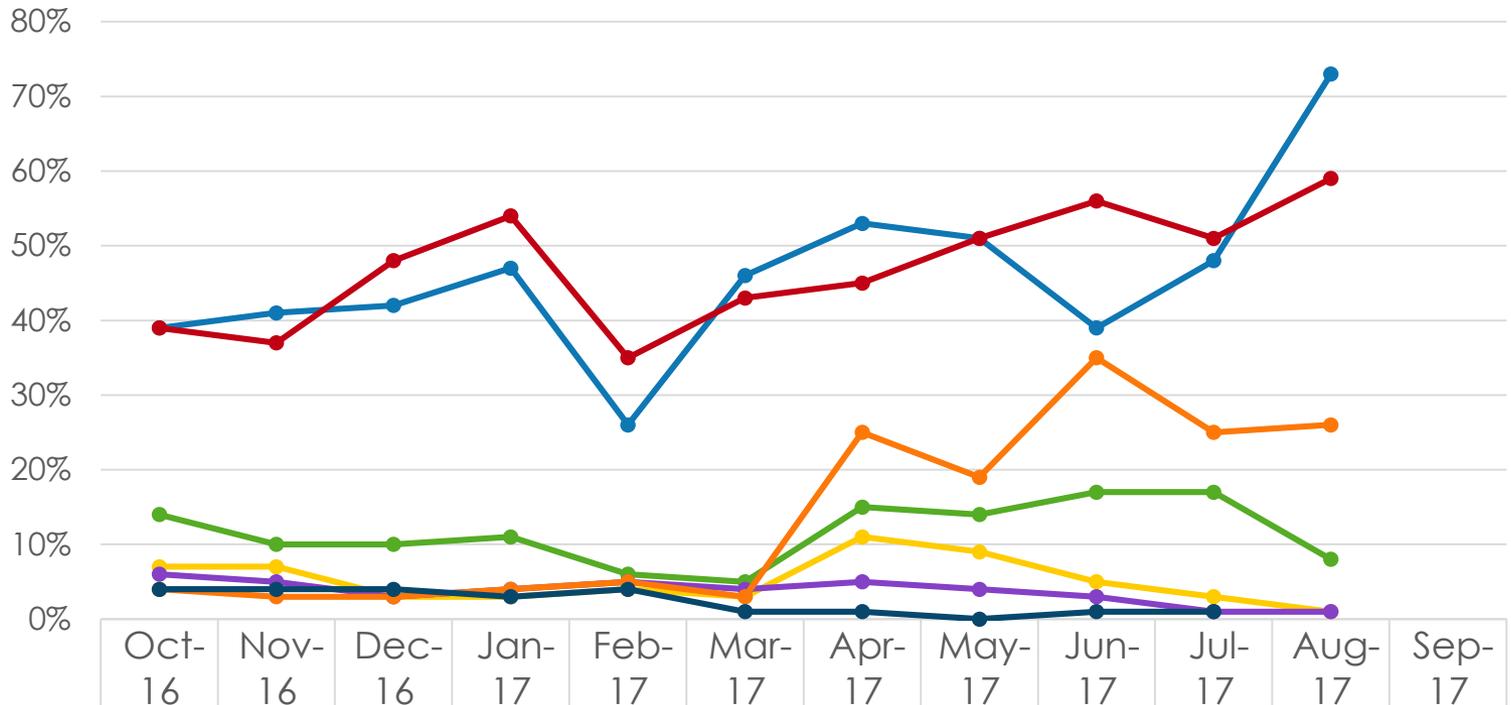
Objectives

- 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

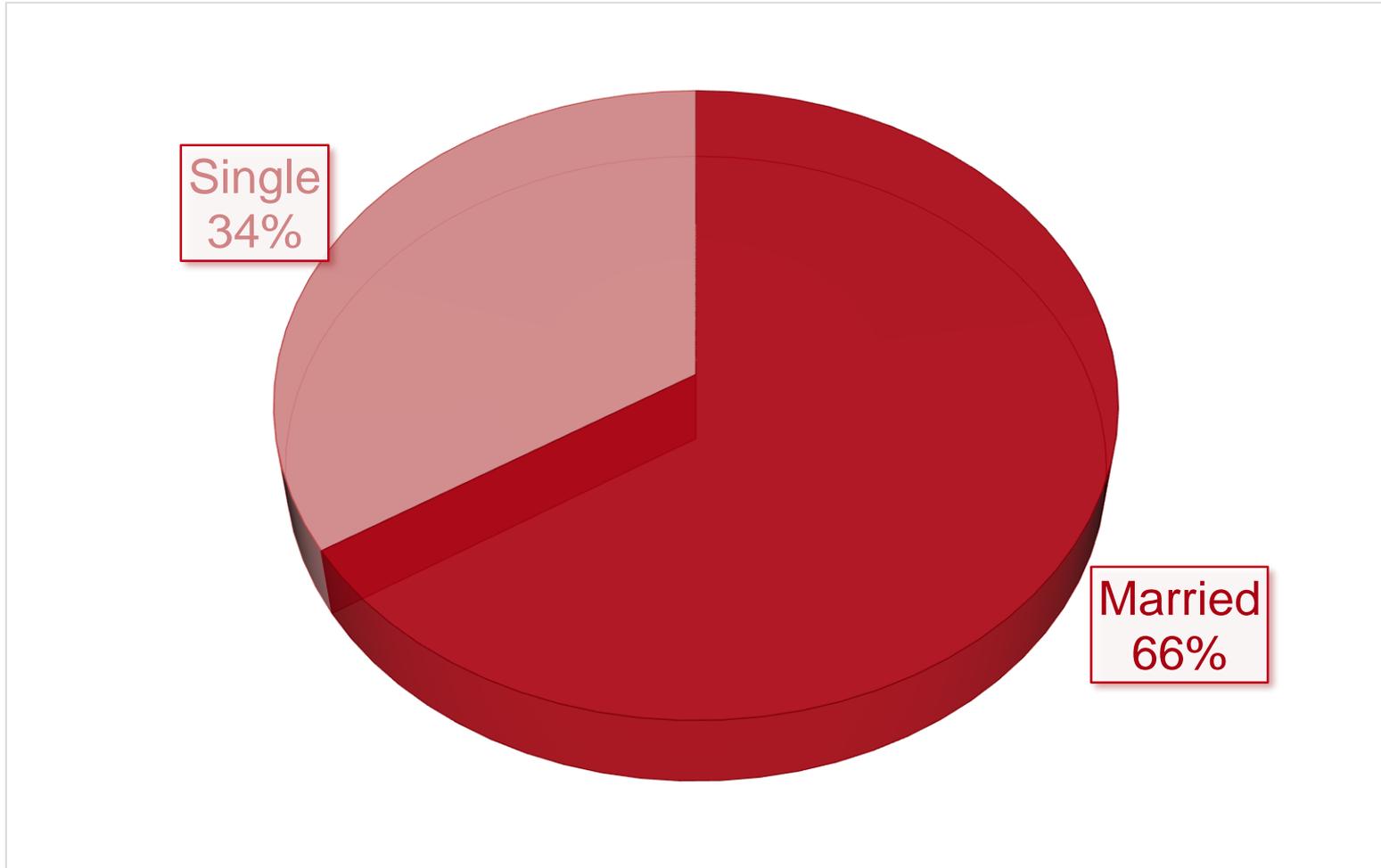


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Family	39%	41%	42%	47%	26%	46%	53%	51%	39%	48%	73%	
Repeat	39%	37%	48%	54%	35%	43%	45%	51%	56%	51%	59%	
Office Lady	14%	10%	10%	11%	6%	5%	15%	14%	17%	17%	8%	
Wedding	7%	7%	3%	3%	4%	3%	11%	9%	5%	3%	1%	
Silver	6%	5%	3%	4%	5%	4%	5%	4%	3%	1%	1%	
Group	4%	3%	3%	4%	5%	3%	25%	19%	35%	25%	26%	
MICE	4%	4%	4%	3%	4%	1%	1%	0%	1%	1%		

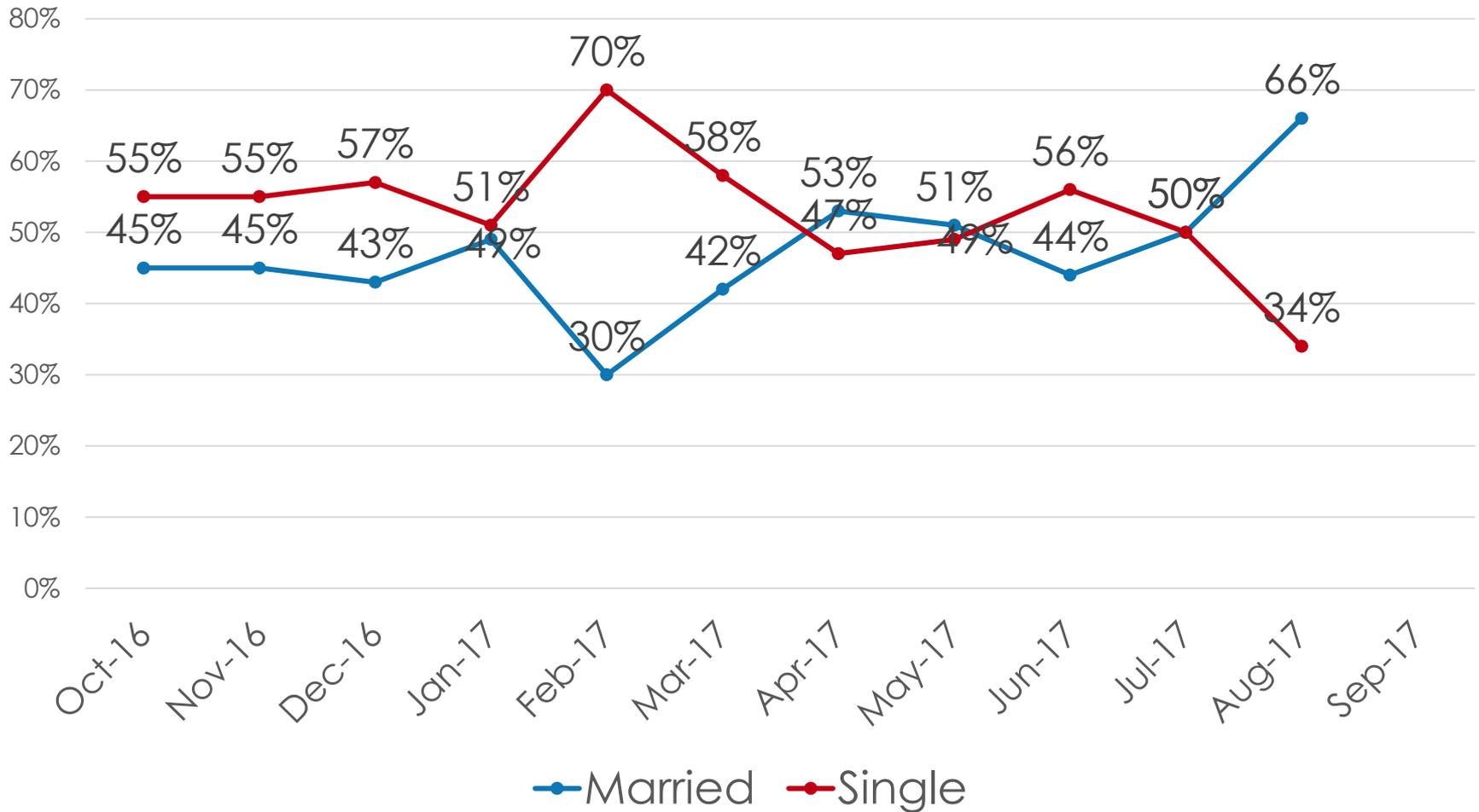
SECTION 1

PROFILE OF RESPONDENTS

Marital Status



Marital status – FY2017 Tracking



Marital status – Key Segments

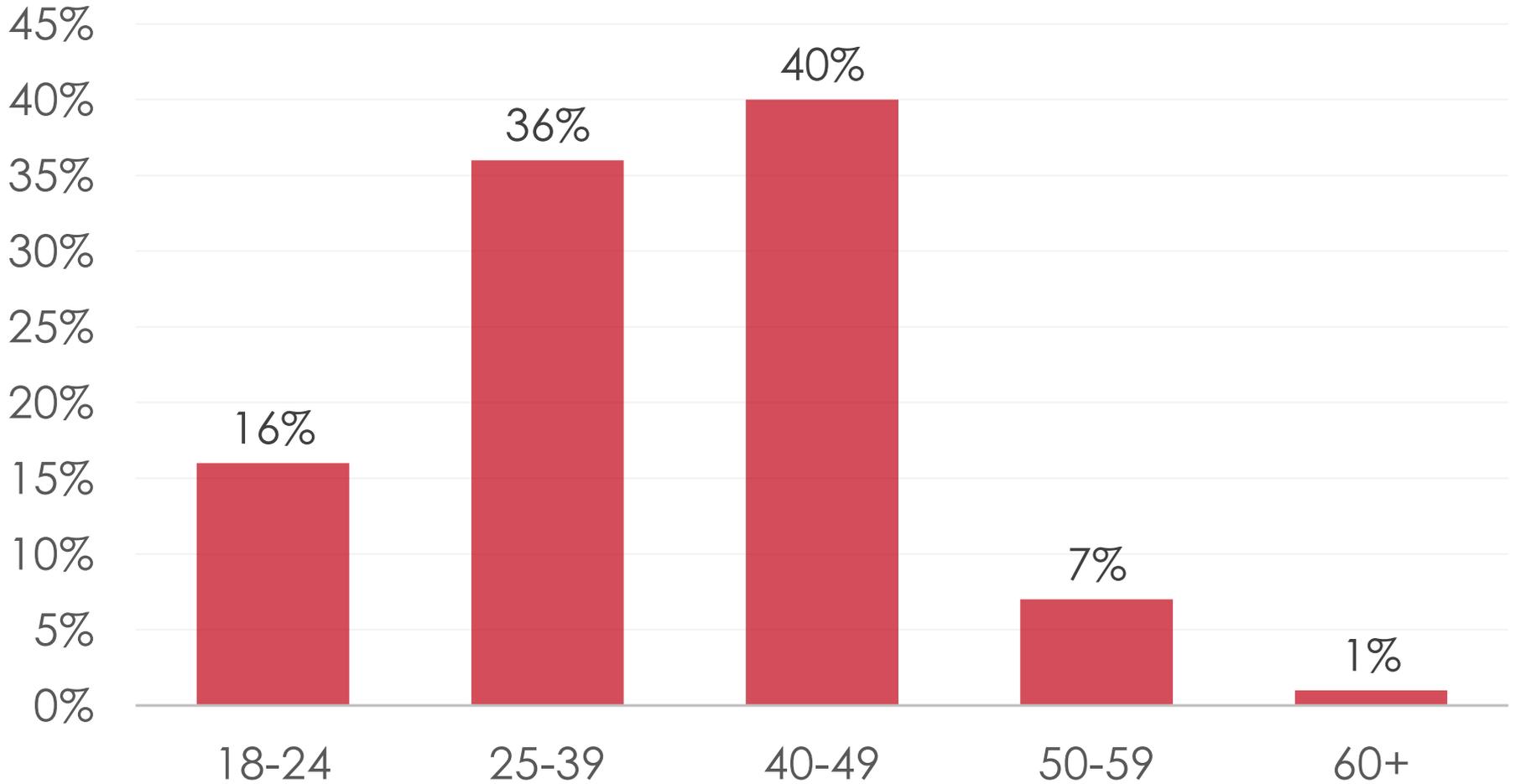
**GVB EXIT SURVEY
QE MARITAL STATUS**

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
QE	Married	66%	89%	75%	43%	67%		75%	75%
	Single	34%	11%	25%	57%	33%		25%	25%
	Total	348	253	207	28	3		4	89

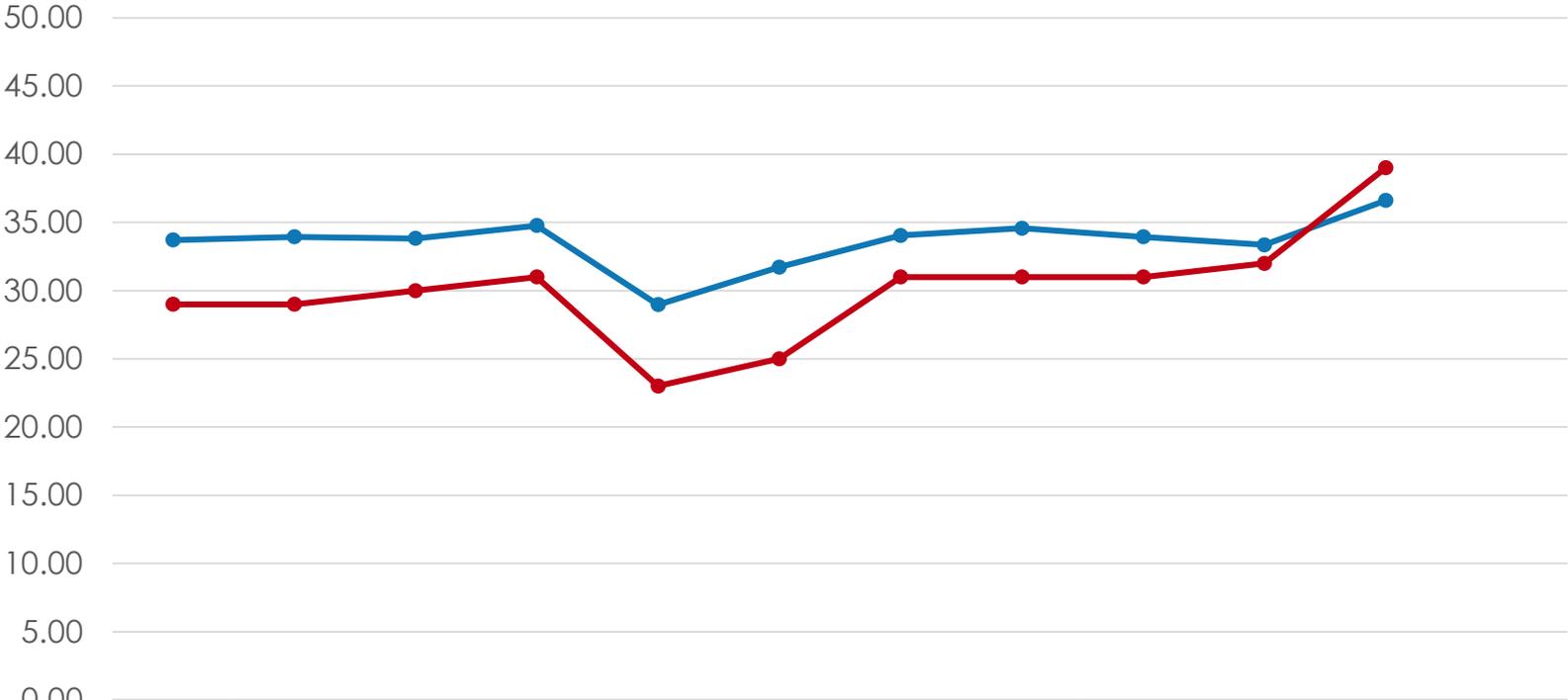
Prepared by Anthology Research

Age

MEAN = 36.61
MEDIAN = 39



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	36.61	
MEDIAN	29	29	30	31	23	25	31	31	31	32	39	

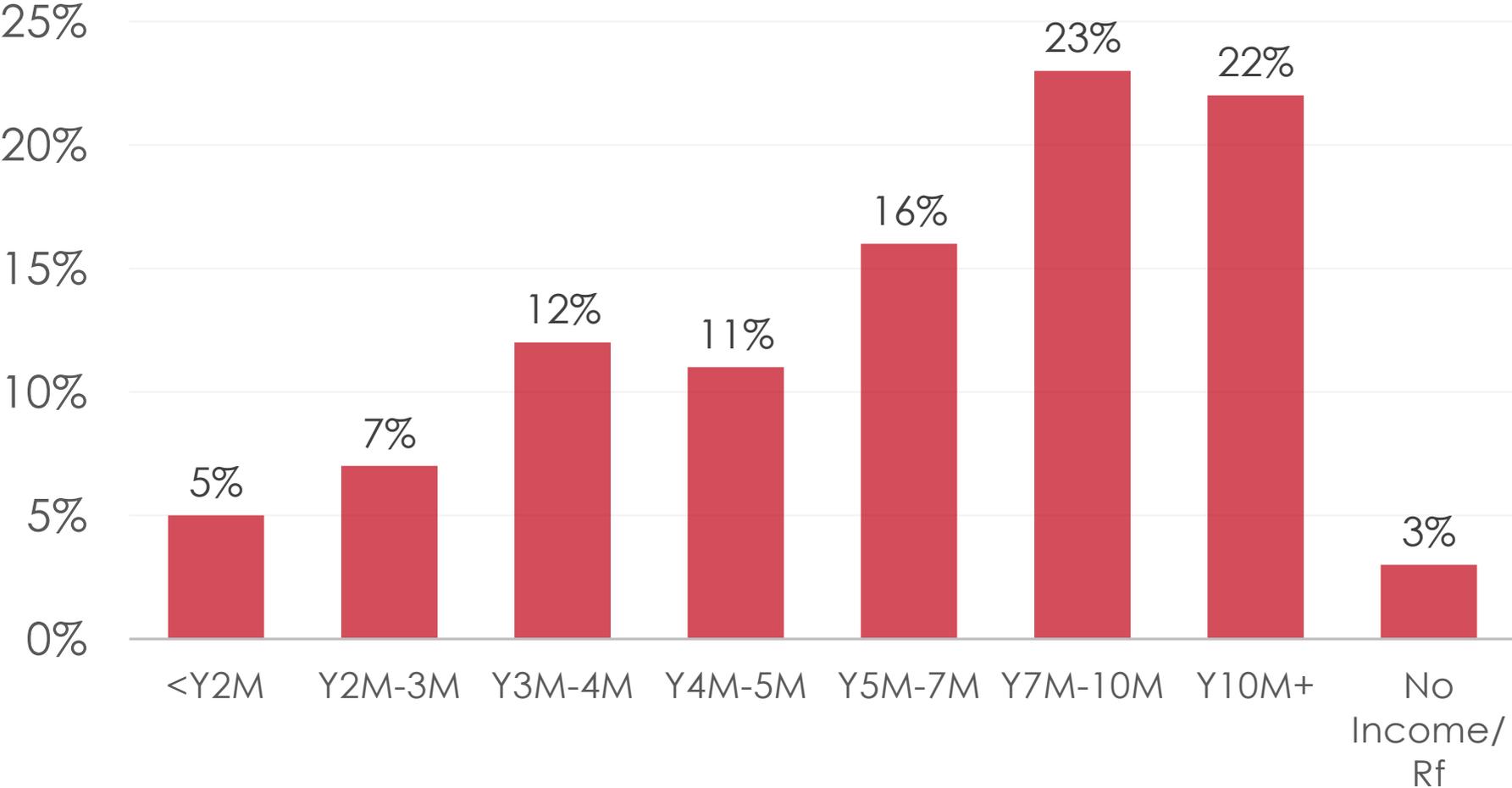
Age – Key Segments

GVB EXIT SURVEY
AGE

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
QF	18-24	16%	4%	11%	18%				6%
	25-39	36%	32%	30%	46%			75%	45%
	40-49	40%	54%	50%	18%			25%	43%
	50-59	7%	9%	8%	18%				7%
	60+	1%	1%	1%		100%			
	Total	348	253	207	28	3		4	89
QF	Mean	36.61	40.57	39.08	35.36	64.33	.	33.25	38.38
	Median	39	41	41	32	65	.	31	39

Prepared by Anthology Research

Annual Household Income



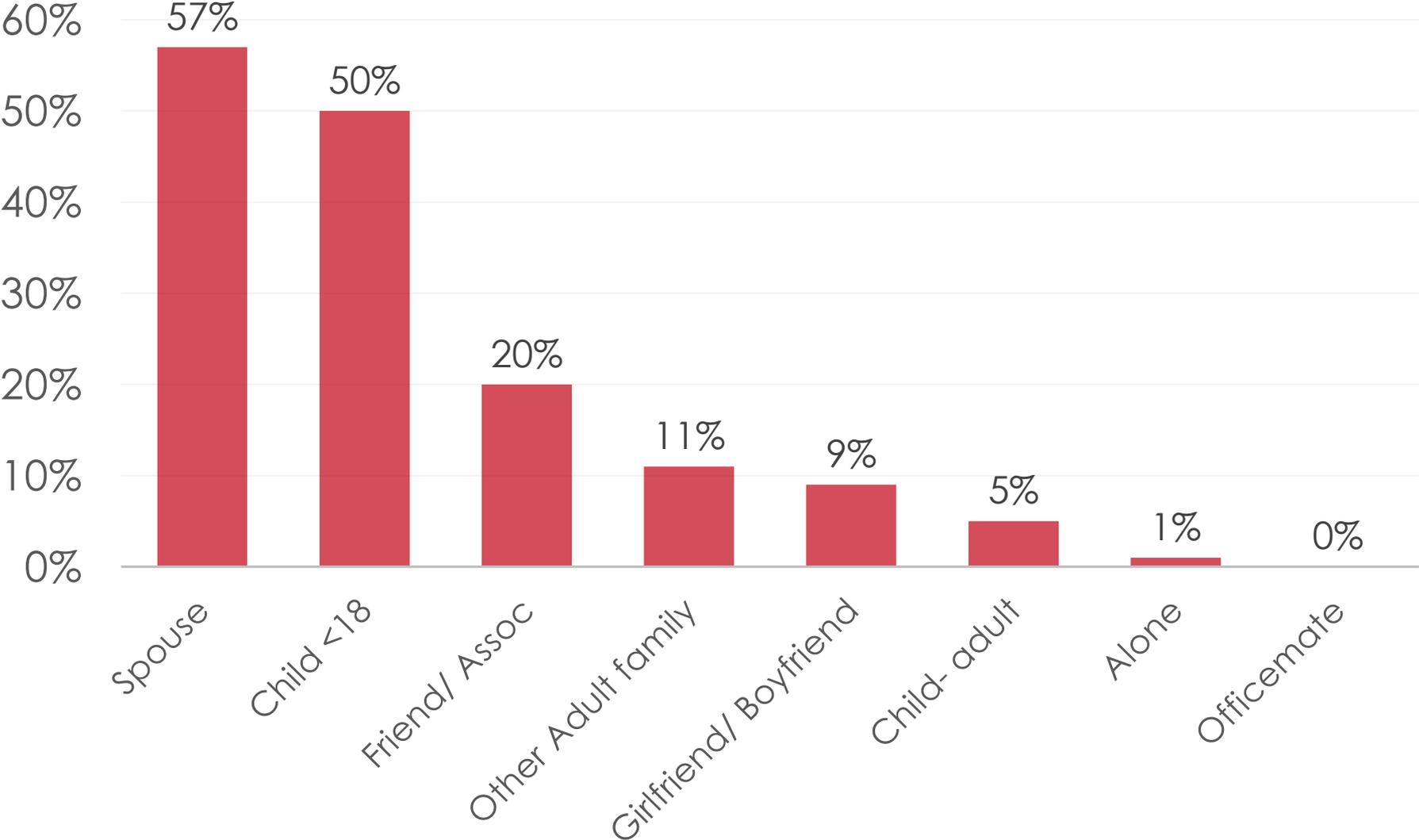
Annual Household Income – Key Segments

GVB EXIT SURVEY
Q26 Household income:

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q26	Less than ¥2 million	5%	3%	6%	4%			25%	3%
	¥2,000,001 ~ ¥3,000,000	7%	3%	5%	12%	33%			3%
	¥3,000,001 ~ ¥4,000,000	12%	10%	11%	27%				20%
	¥4,000,001 ~ ¥5,000,000	11%	9%	10%	15%	33%			12%
	¥5,000,001 ~ ¥7,000,000	16%	17%	16%	15%			50%	17%
	¥7,000,001 ~ ¥10 million	23%	28%	23%	12%				23%
	¥10 million or more	22%	29%	30%	15%	33%		25%	19%
	No Income	3%	2%	2%					2%
	Total	335	245	200	26	3		4	86

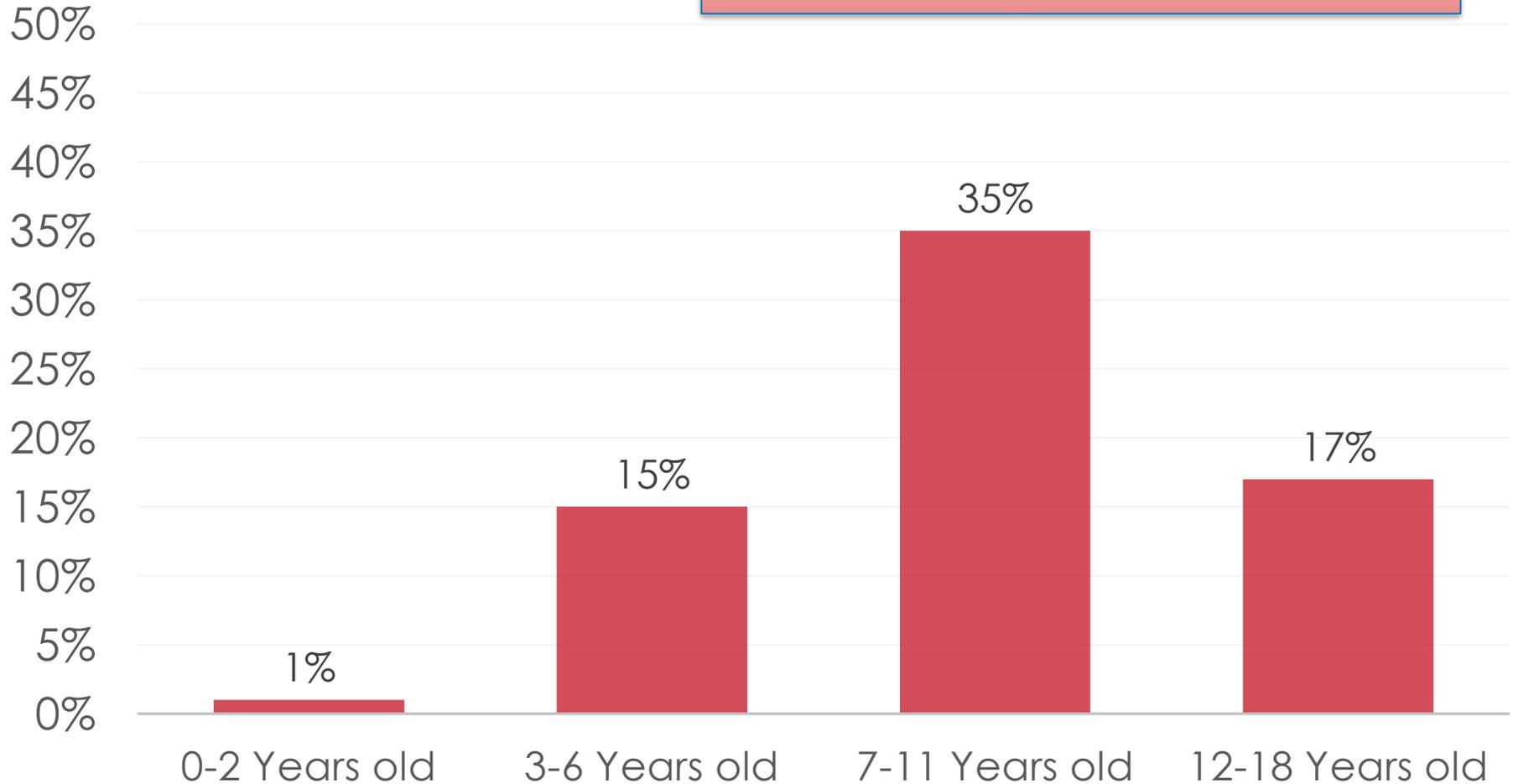
Prepared by Anthology Research

Travel Party

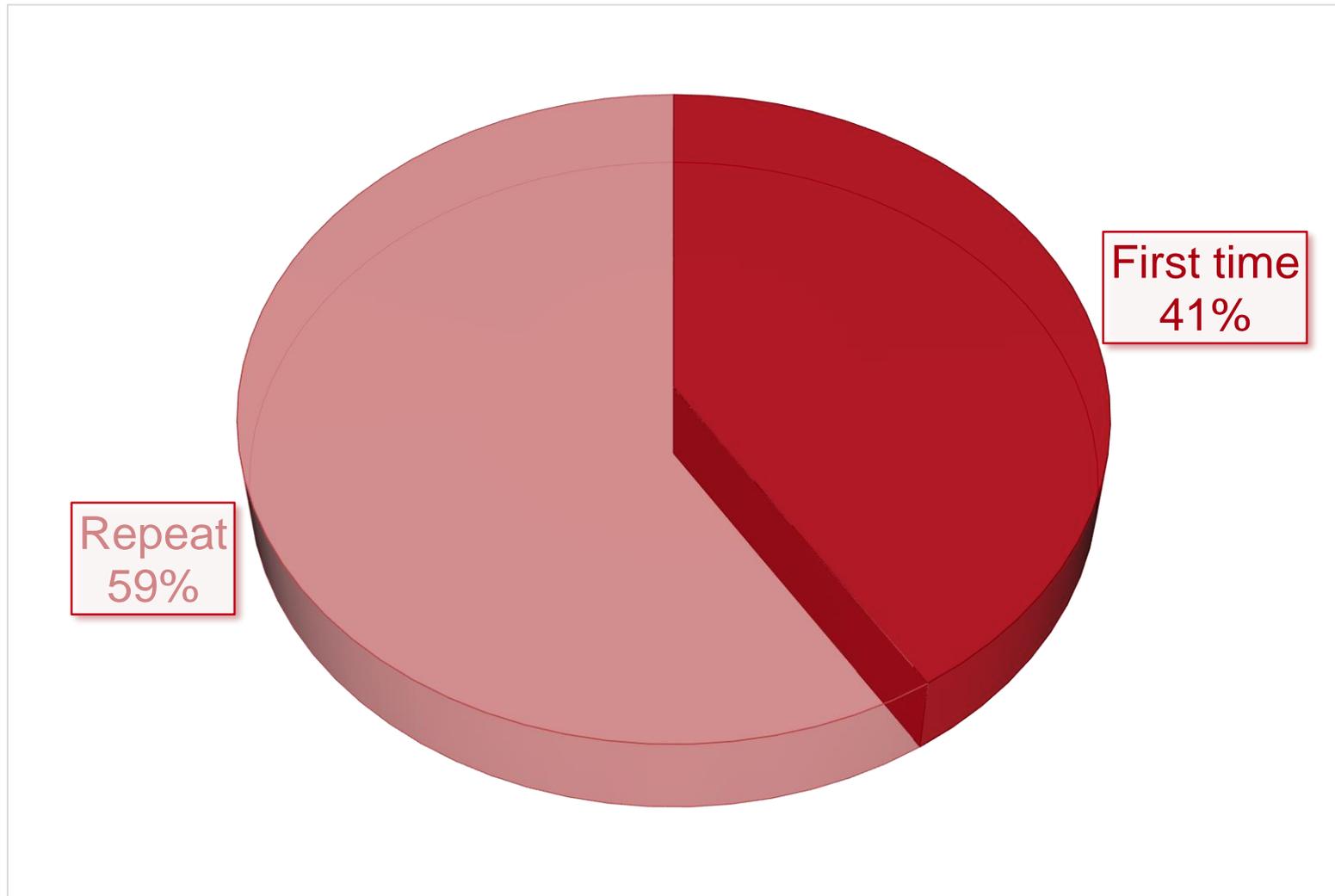


Travel Party - Children

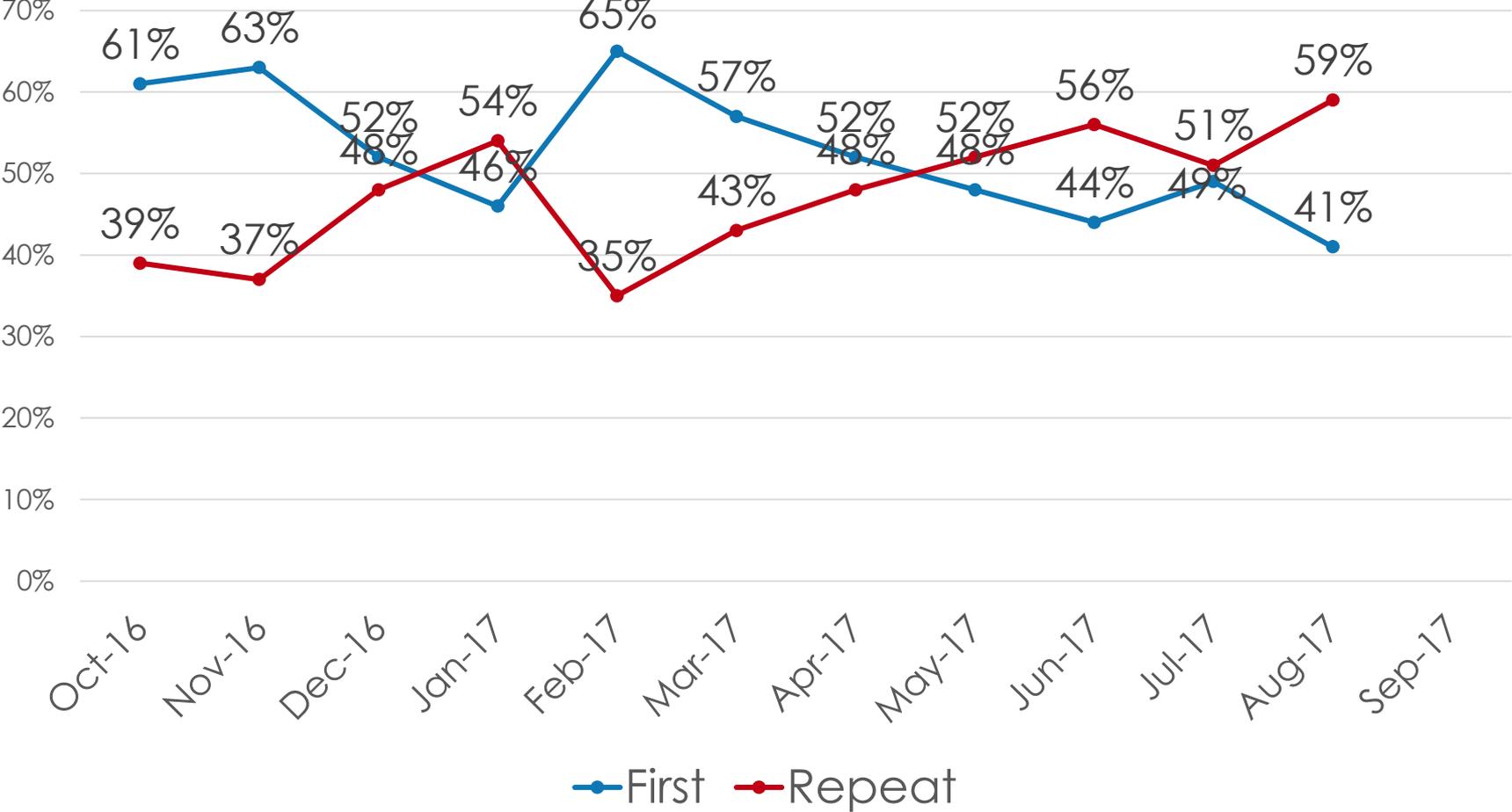
50% TRAVELING WITH A CHILD



Trips to Guam



Trips to Guam – FY2017 Tracking



Trips to Guam – Key Segments

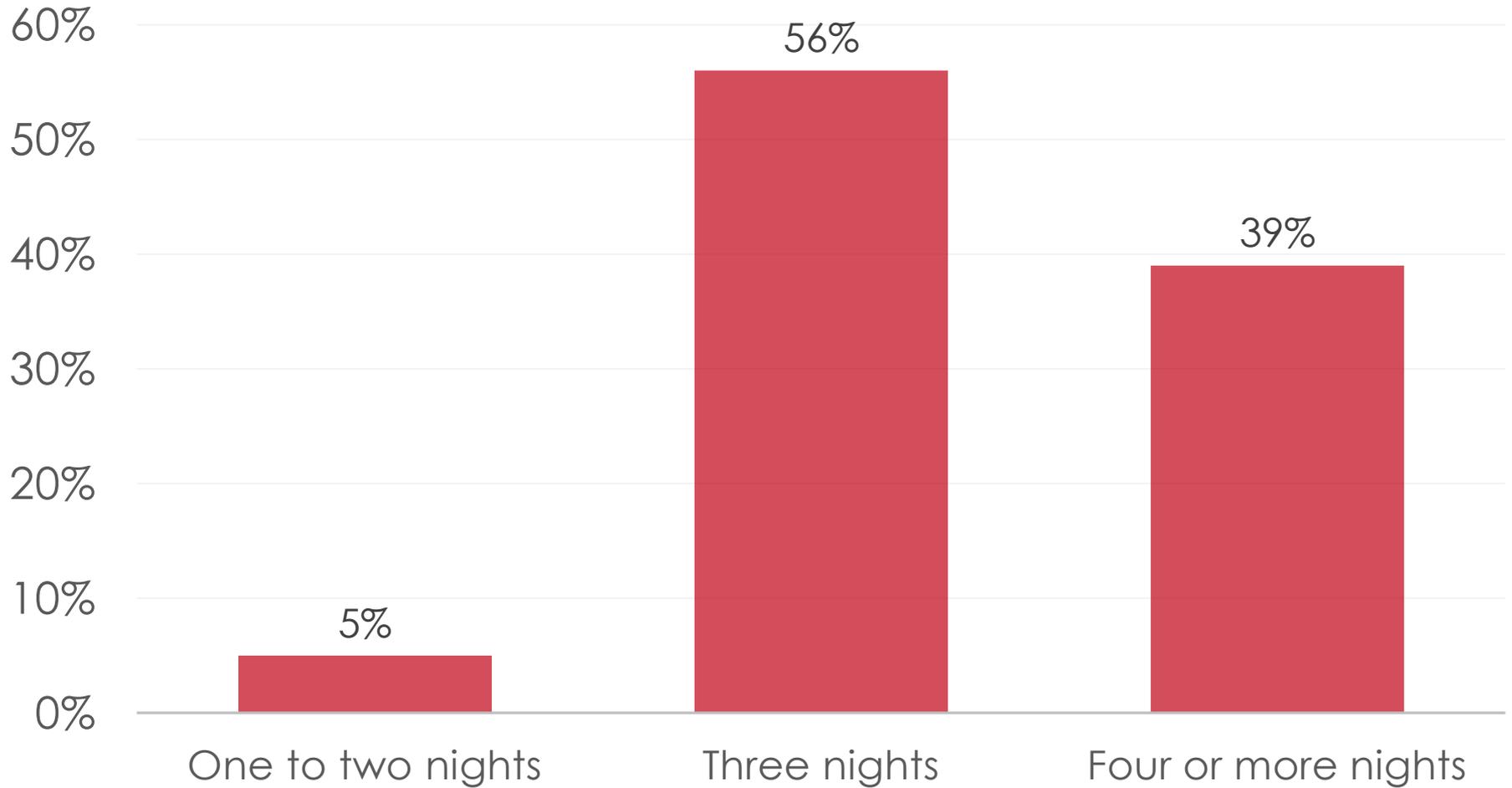
GVB EXIT SURVEY
Q3 Including this trip, how many times have you visited Guam?

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q3	1st time	41%	33%		36%	33%		25%	38%
	Repeat	59%	67%	100%	64%	67%		75%	62%
	Total	348	253	207	28	3		4	89
Q3	Mean	2.62	2.86	3.72	2.86	2.33		2.25	2.36
	Median	2	2	3	2	2		2	2

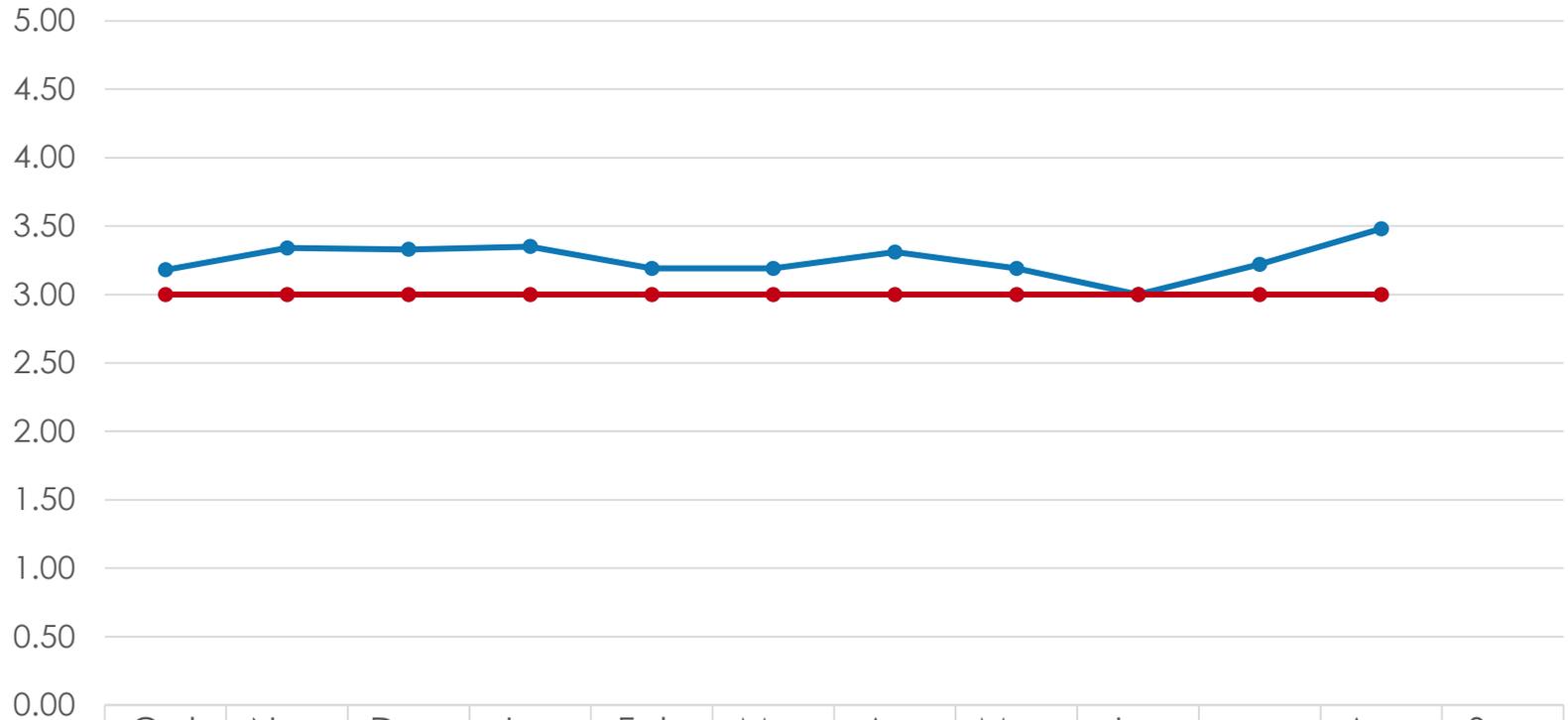
Prepared by Anthology Research

Length of Stay

MEAN NUMBER OF NIGHTS = 3.48
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	3.48	
MEDIAN	3	3	3	3	3	3	3	3	3	3	3	

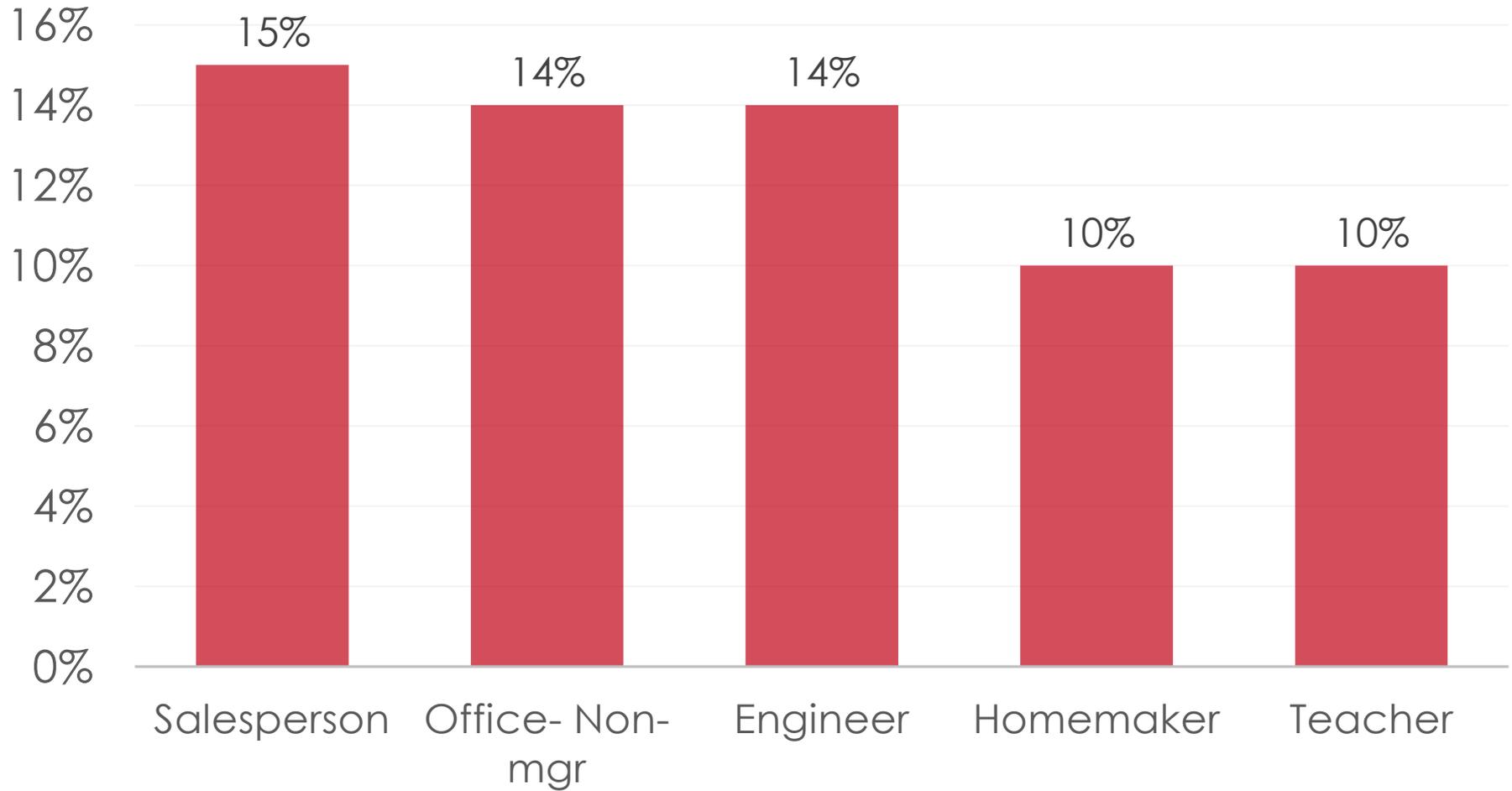
Length of Stay – Key Segments

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	5%	4%	5%	7%				7%
	3	56%	54%	53%	64%	33%		75%	64%
	4+	39%	43%	42%	29%	67%		25%	29%
	Total	348	253	207	28	3		4	89
SA	Mean	3.48	3.57	3.56	3.25	3.67		3.25	3.30
	Median	3	3	3	3	4		3	3

Prepared by Anthology Research

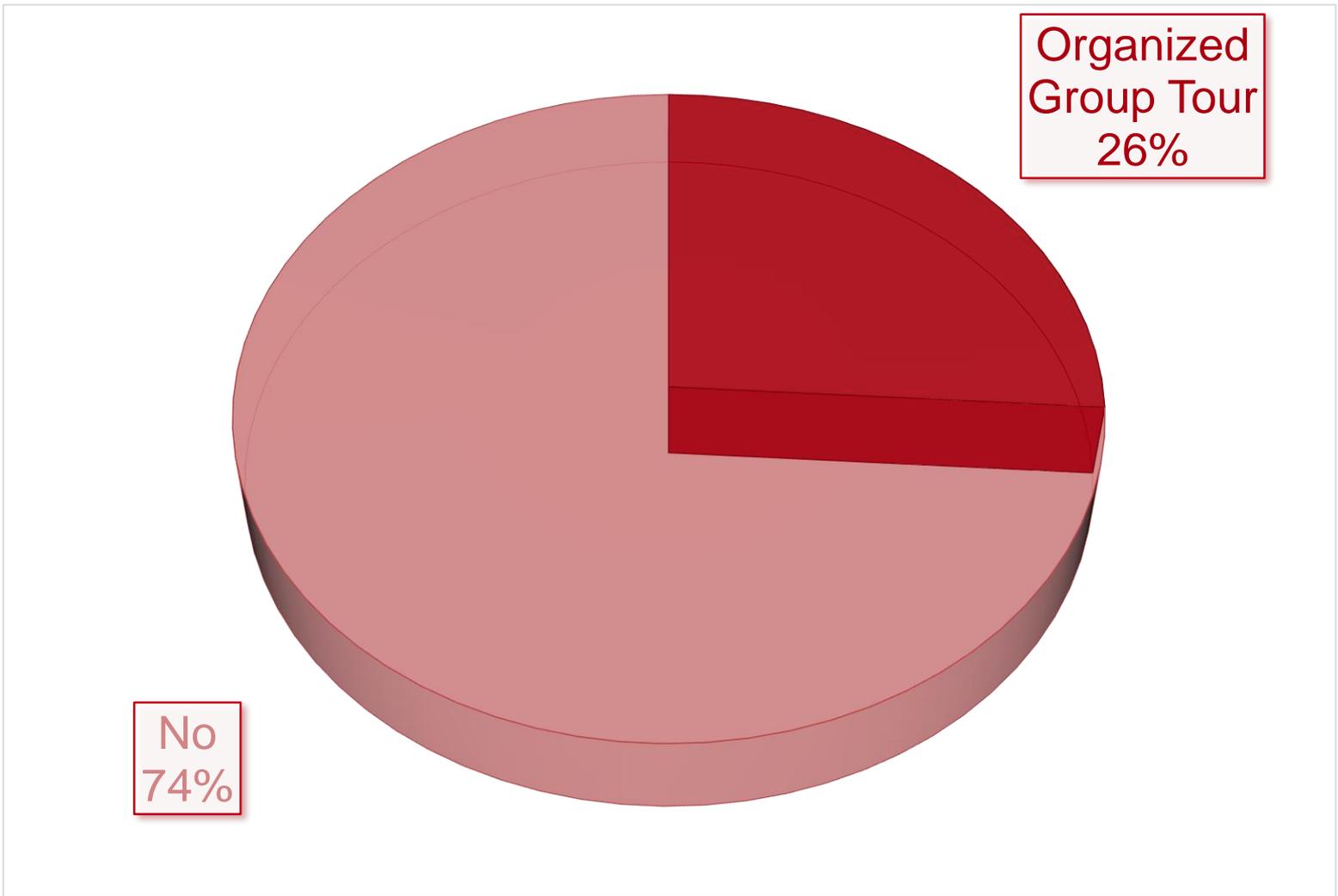
Occupation – Top Responses (10%+)



SECTION 2

TRAVEL PLANNING

Organized Group Tour

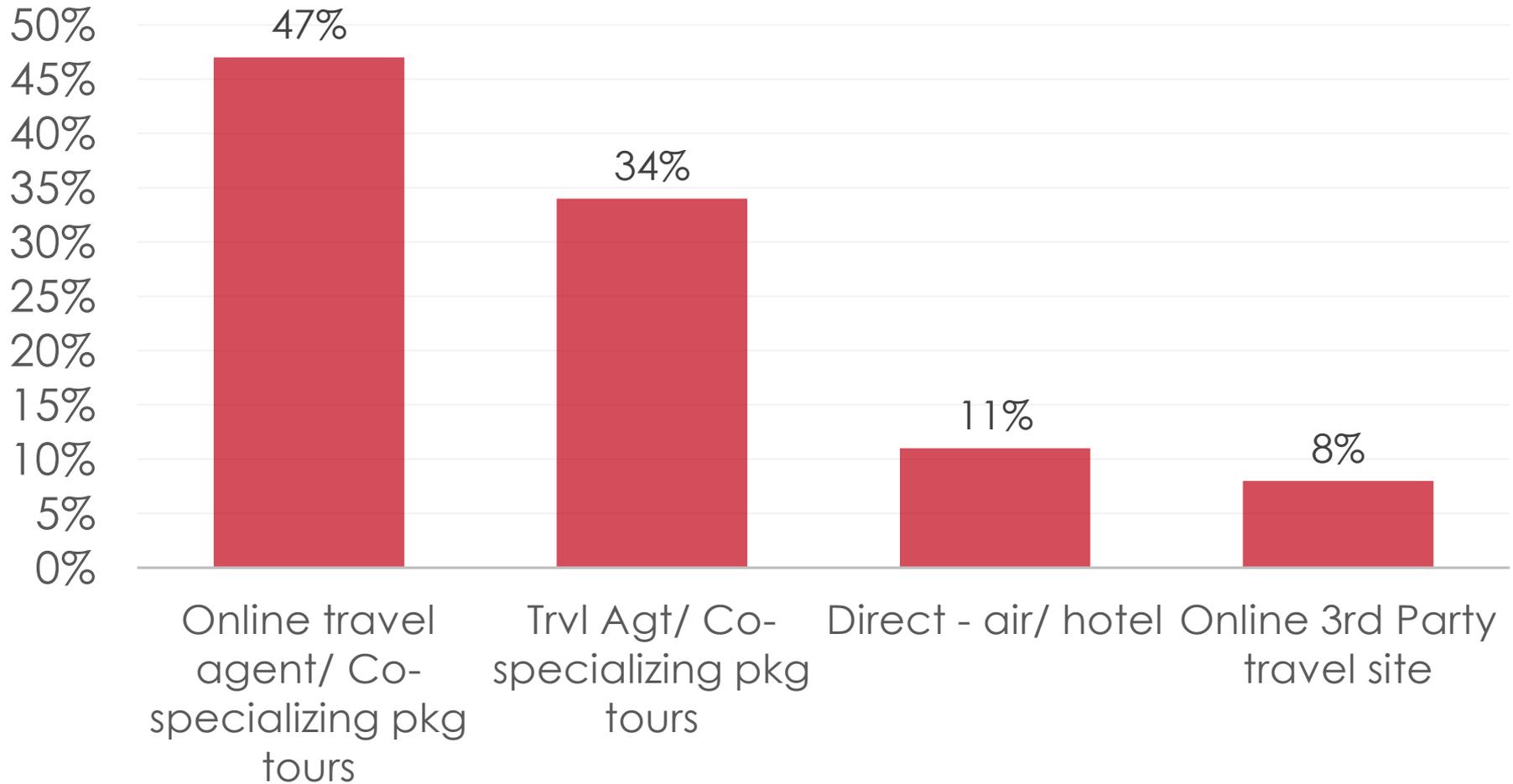


Organized Group Tour– FY2017 Tracking

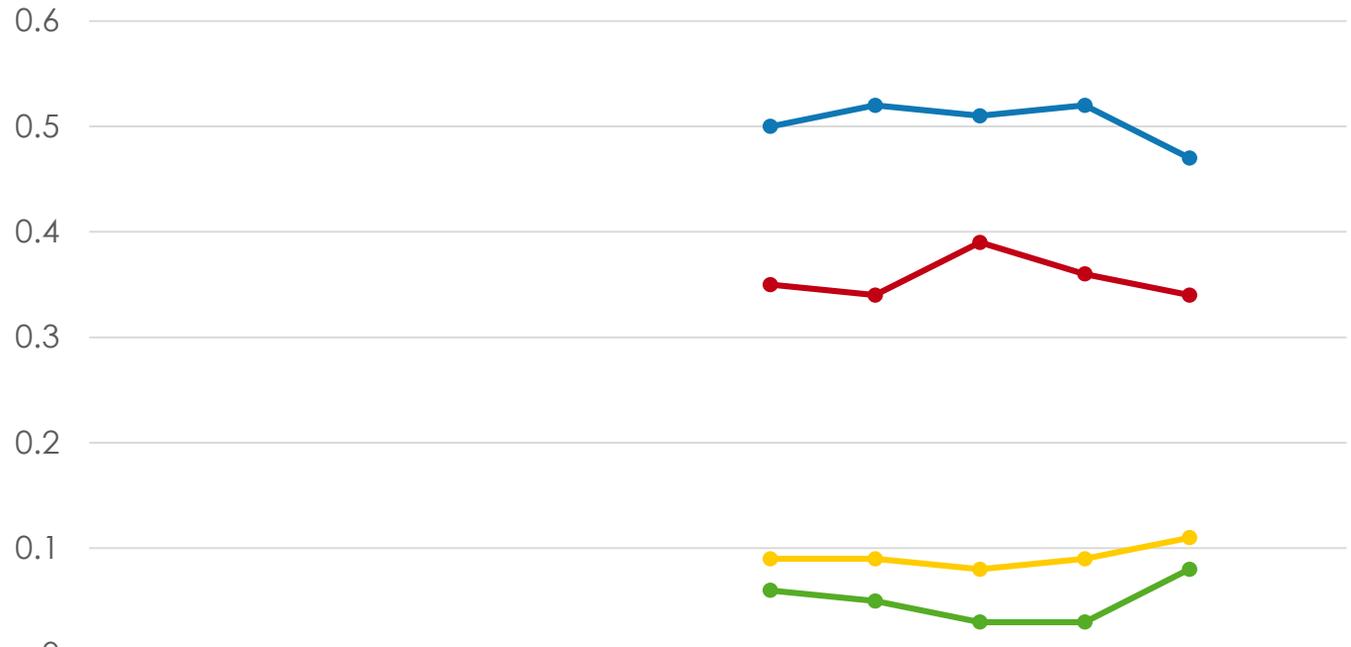


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Group Tour							26%	19%	35%	25%	26%	

Travel Arrangements - Sources

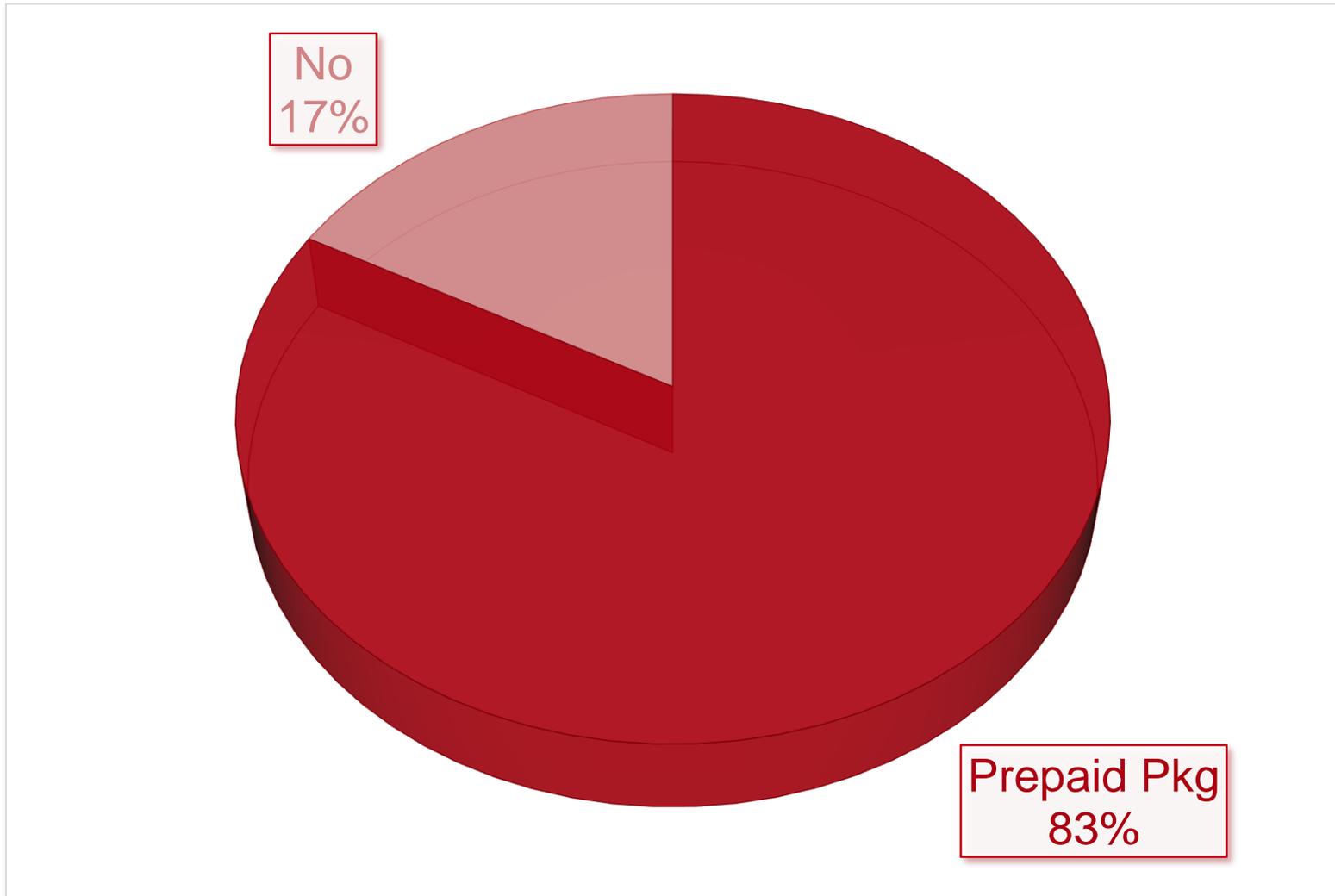


Travel Arrangements - Sources

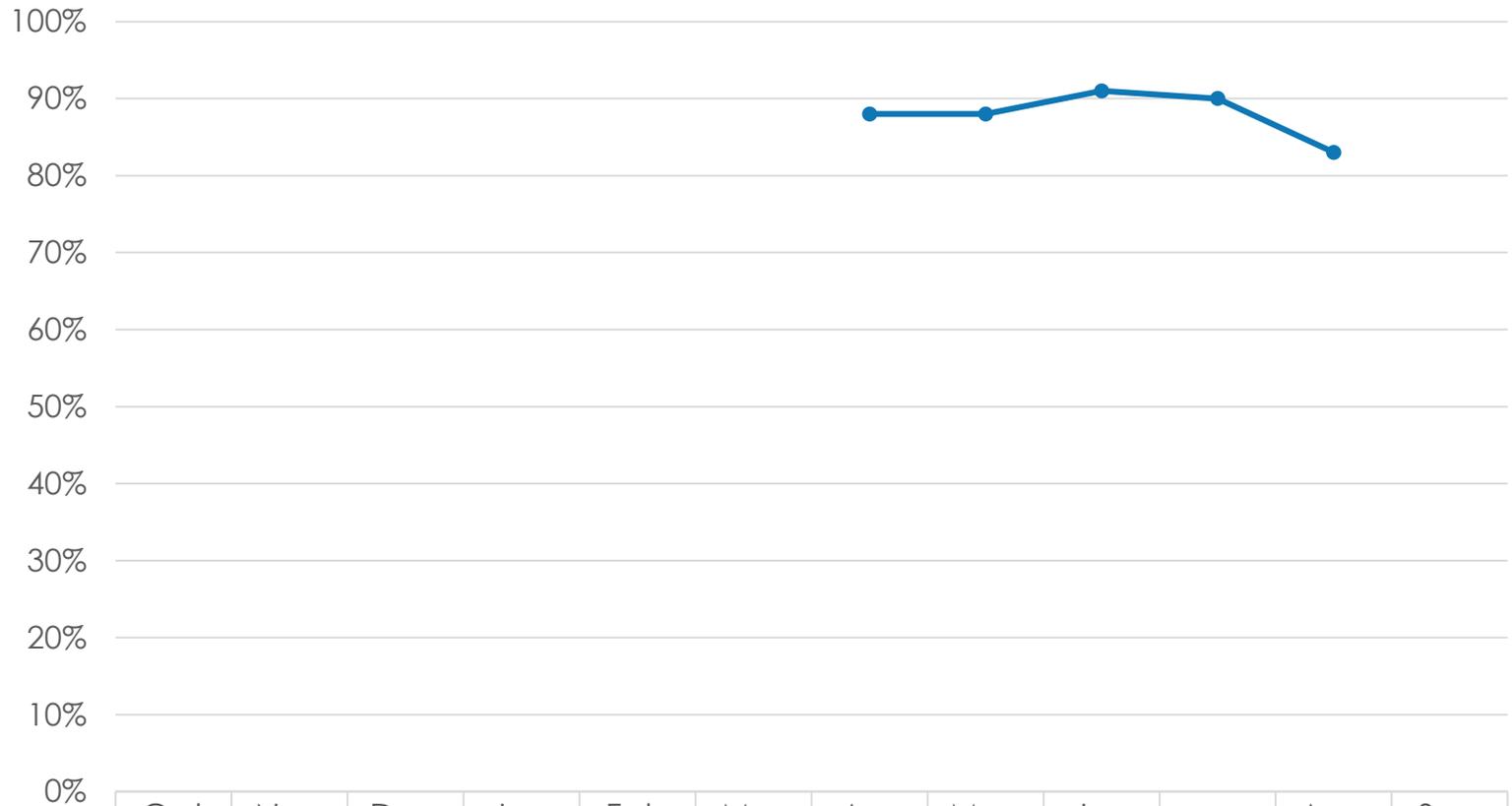


	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Online travel agent							50%	52%	51%	52%	47%	
Trvl Agt/ Co- Pkg Tour							35%	34%	39%	36%	34%	
Online 3rd Party							6%	5%	3%	3%	8%	
Direct Air/ Hotel							9%	9%	8%	9%	11%	

Prepaid Pkg Trip

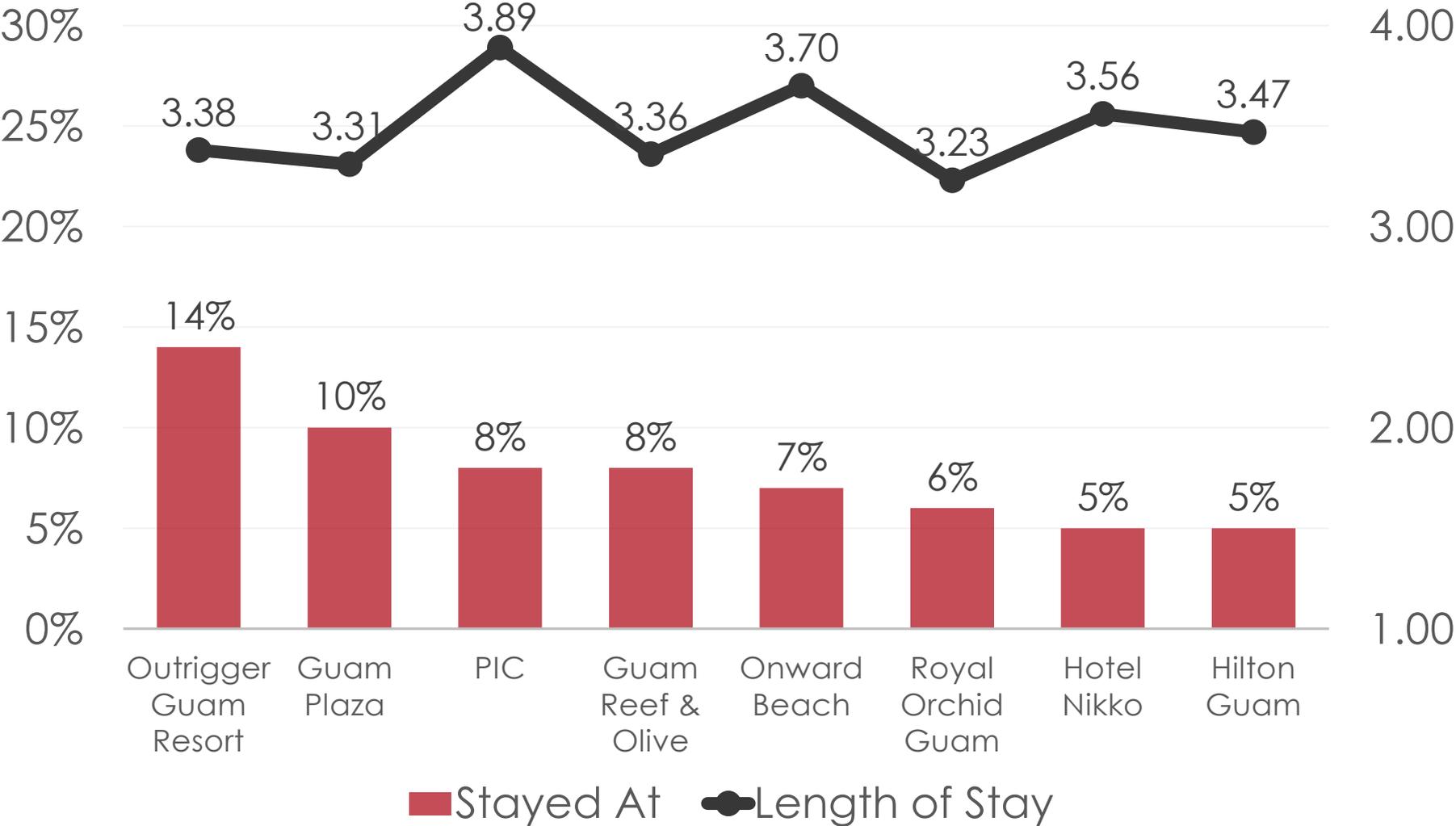


Prepaid Pkg Trip

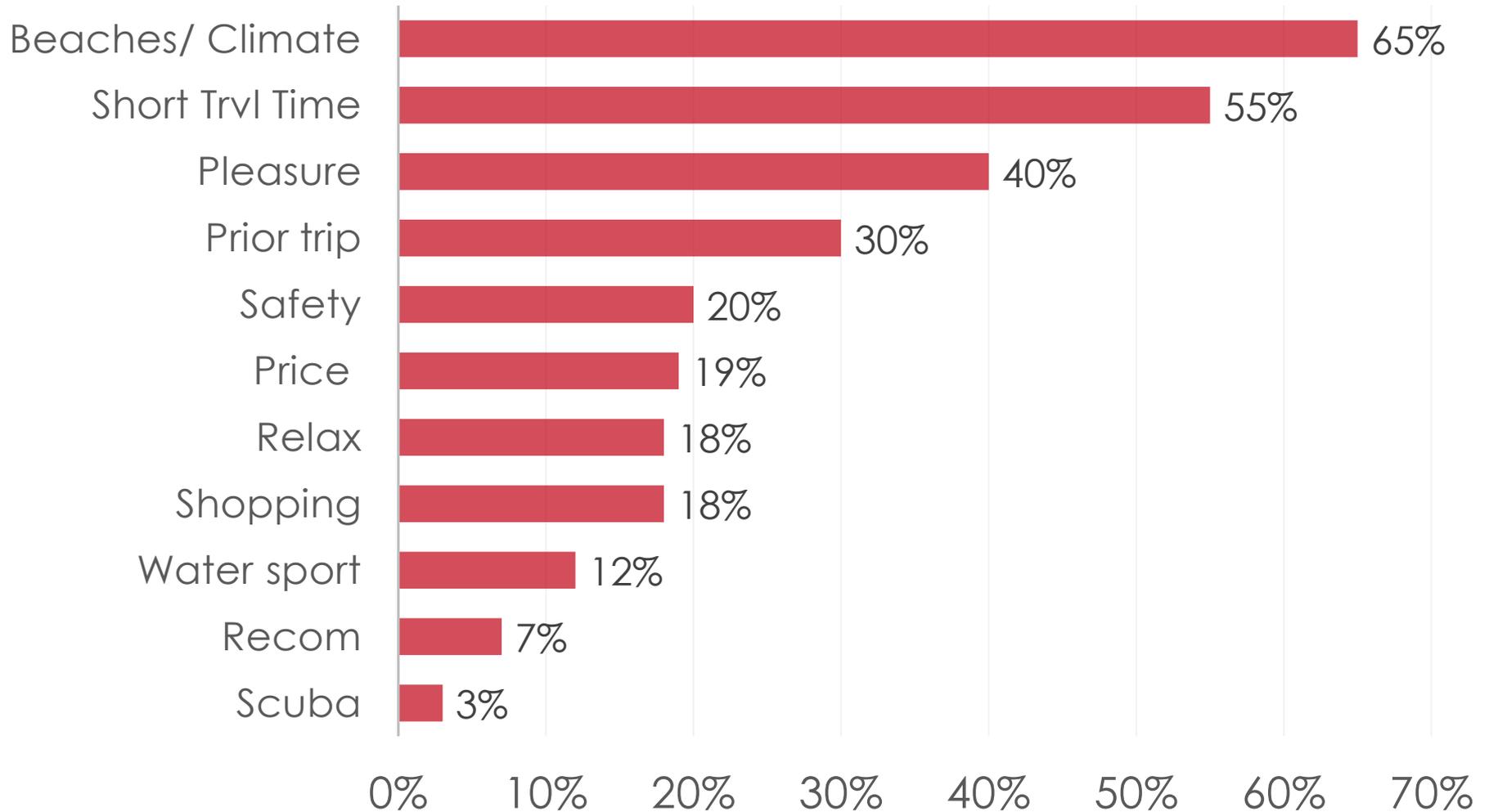


Prepaid Pkg

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	65%	61%	57%	64%	67%			65%
	Short travel time (not too far from home)	55%	61%	53%	54%	67%			58%
	Pleasure/ vacation	40%	38%	39%	32%	33%		50%	36%
	A previous visit	30%	36%	50%	25%	67%			36%
	It is a safe place to spend a vacation	20%	22%	17%	21%	33%		25%	34%
	Price of the tour package	19%	18%	15%	21%				18%
	Just to relax	18%	17%	20%	29%				10%
	Shopping	18%	14%	19%	18%			25%	15%
	Water sports (snorkeling, windsurfing, parasailing)	12%	13%	10%	14%	33%			8%
	Recommendation of friend/ relative/ travel agency	7%	7%	4%	4%			25%	6%
	Scuba diving	3%	2%	3%					2%
	Adventure	2%	2%	2%	7%				3%
	To visit friends or relatives	2%	2%	3%					1%
	Honeymoon	1%	2%					25%	1%
	To Get Married/ attend Wedding	1%	0%	1%				100%	1%
	Organized sporting activity/ event	1%	1%	1%					1%
	To golf	1%	1%	1%					1%
	My company sponsored me	1%	1%						
	Company/ business trip	0%	0%	0%					1%
	Total	348	253	207	28	3		4	89

SECTION 3

EXPENDITURES

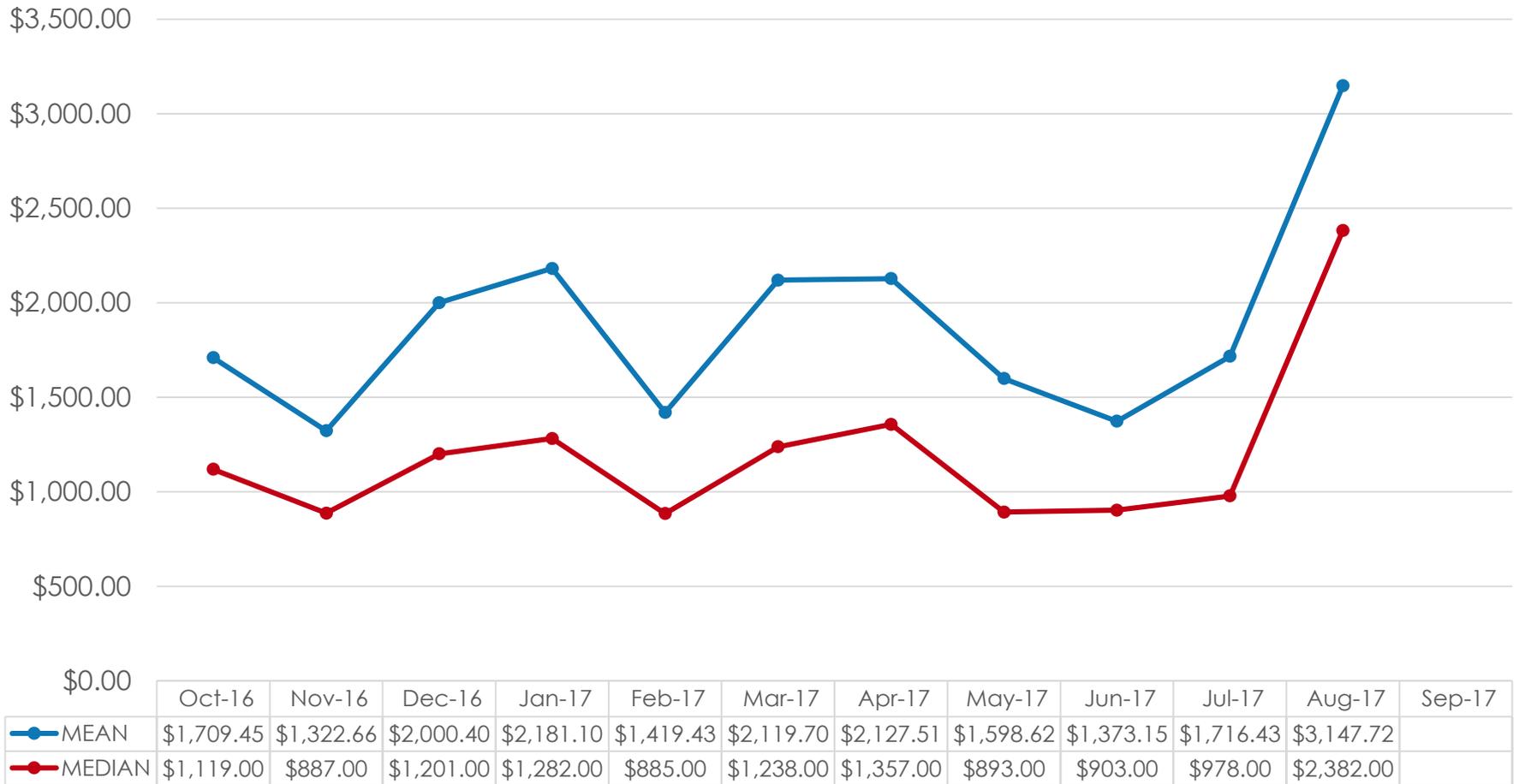
Prepaid Expenditures

EXCHANGE RATE ¥109.77=\$1

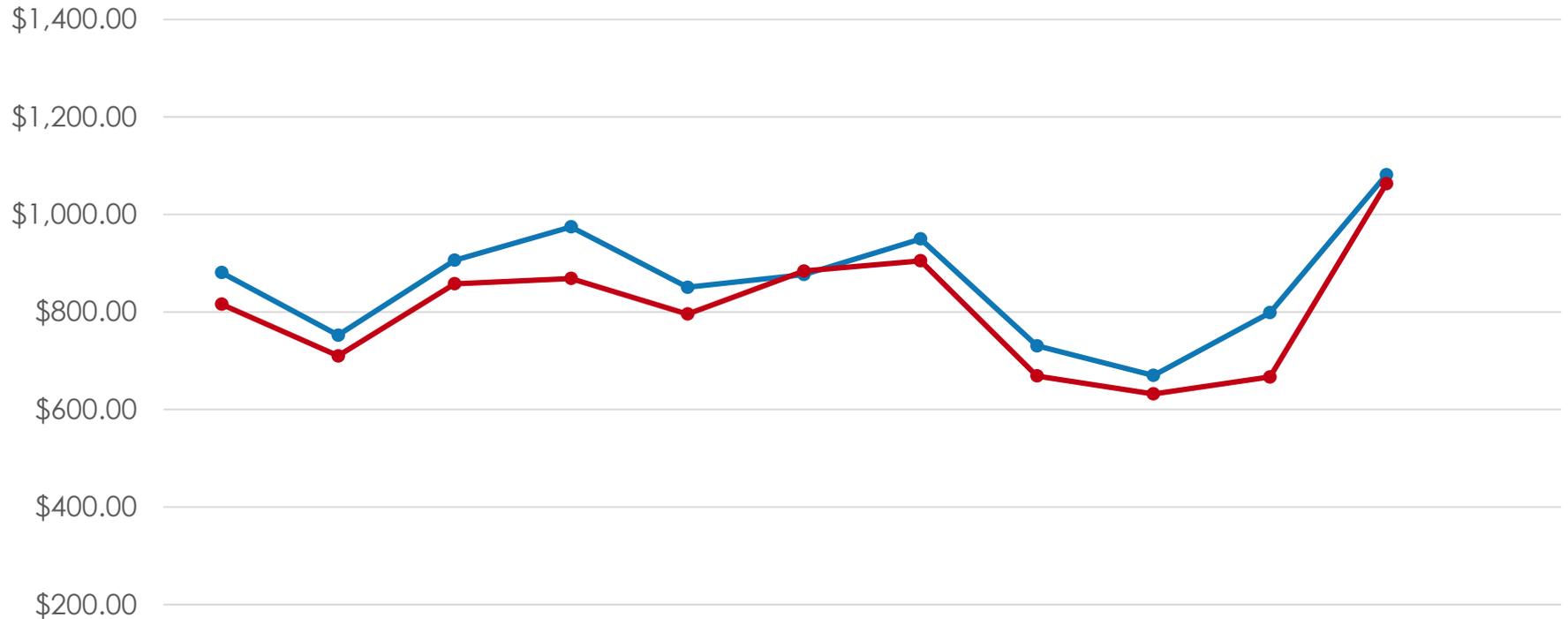
- \$3,147.72 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$1,081.60 = overall mean average per person prepaid expenditures

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	\$1,081.60	
MEDIAN	\$816.00	\$710.00	\$858.00	\$869.00	\$796.00	\$884.00	\$905.00	\$669.00	\$632.00	\$667.00	\$1,063.00	

Prepaid Per Person– Key Segments

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

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
PREPAID PP	Mean	\$1,081.60	\$1,133.38	\$1,074.95	\$1,028.57	\$1,098.26	.	\$676.75	\$1,100.31
	Median	\$1,063	\$1,093	\$1,002	\$941	\$1,154	.	\$746	\$1,073

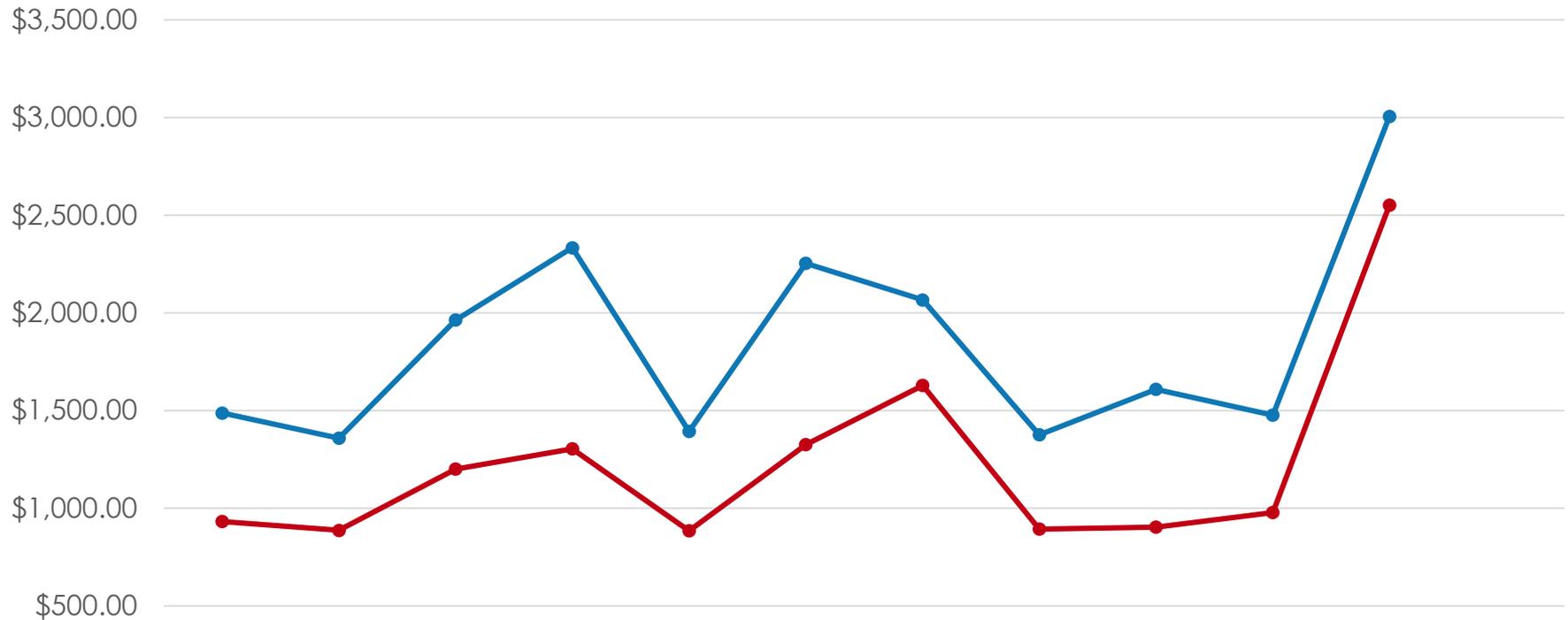
Prepared by Anthology Research

Prepaid Expenses by Category – Mean Entire Travel Party



Prepaid- FY2017 Tracking

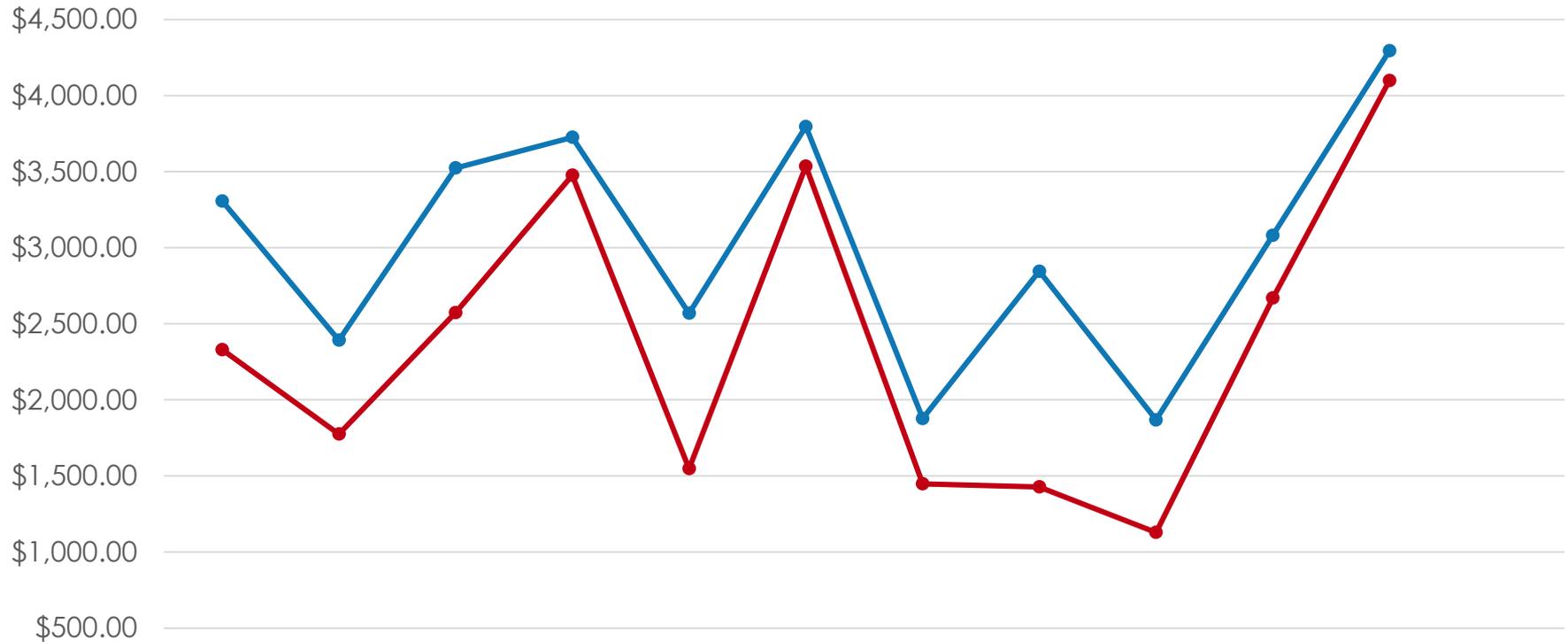
Airfare & Accommodation Packages



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-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	\$3,004.86	
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	\$2,551.00	

Prepaid- FY2017 Tracking

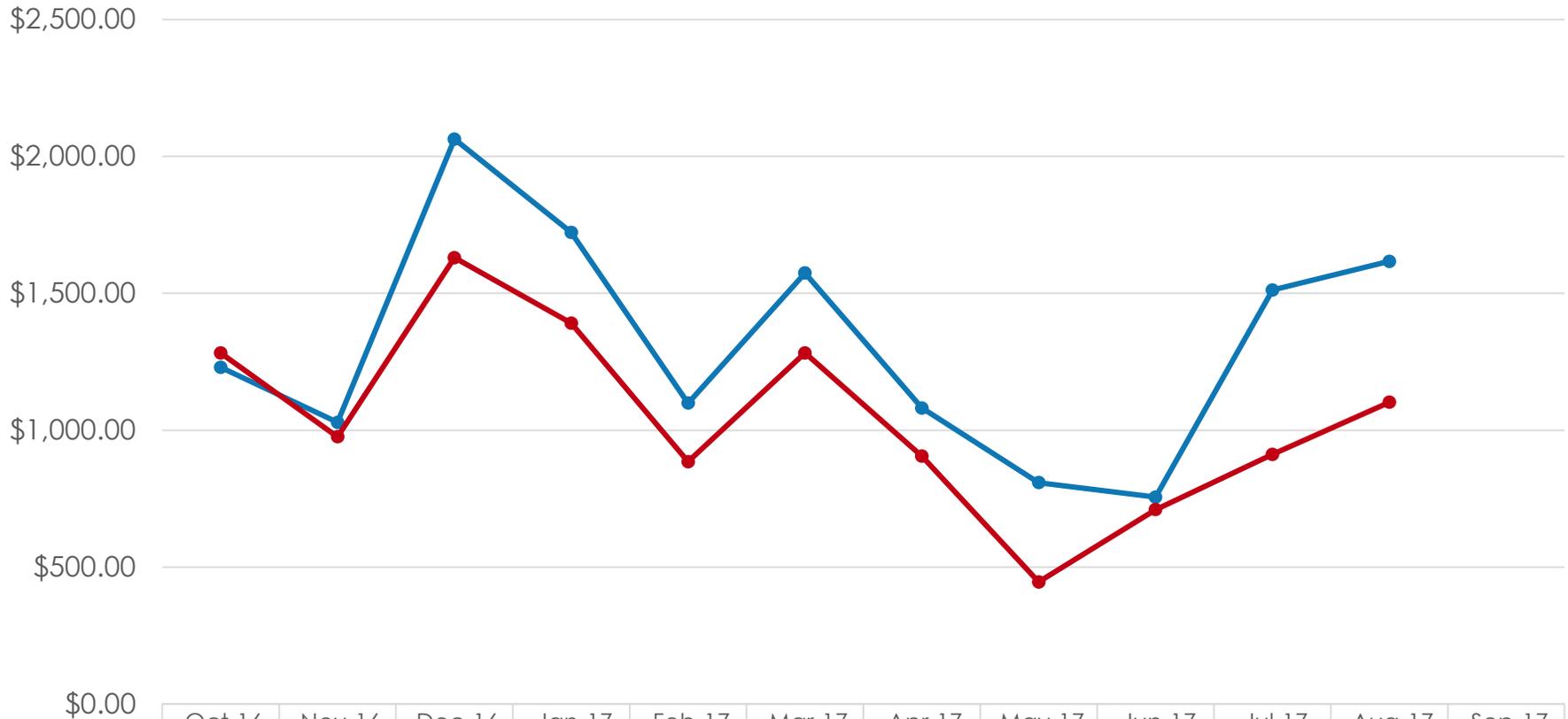
Airfare & Accommodation W/ Meal Packages



	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	\$4,294.29	
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	\$4,099.00	

Prepaid– FY2017 Tracking

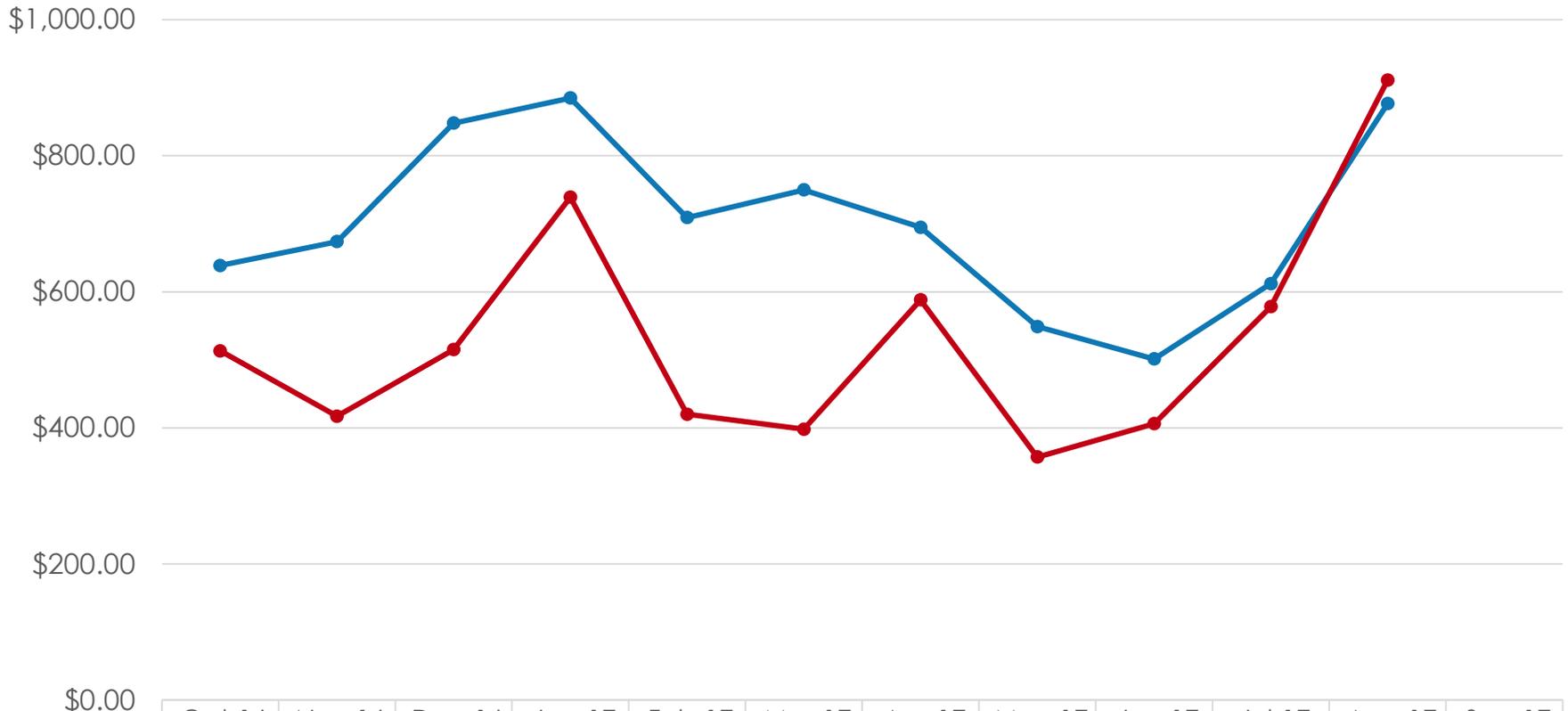
Airfare Only



	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	\$1,616.51	
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	\$1,102.00	

Prepaid- FY2017 Tracking

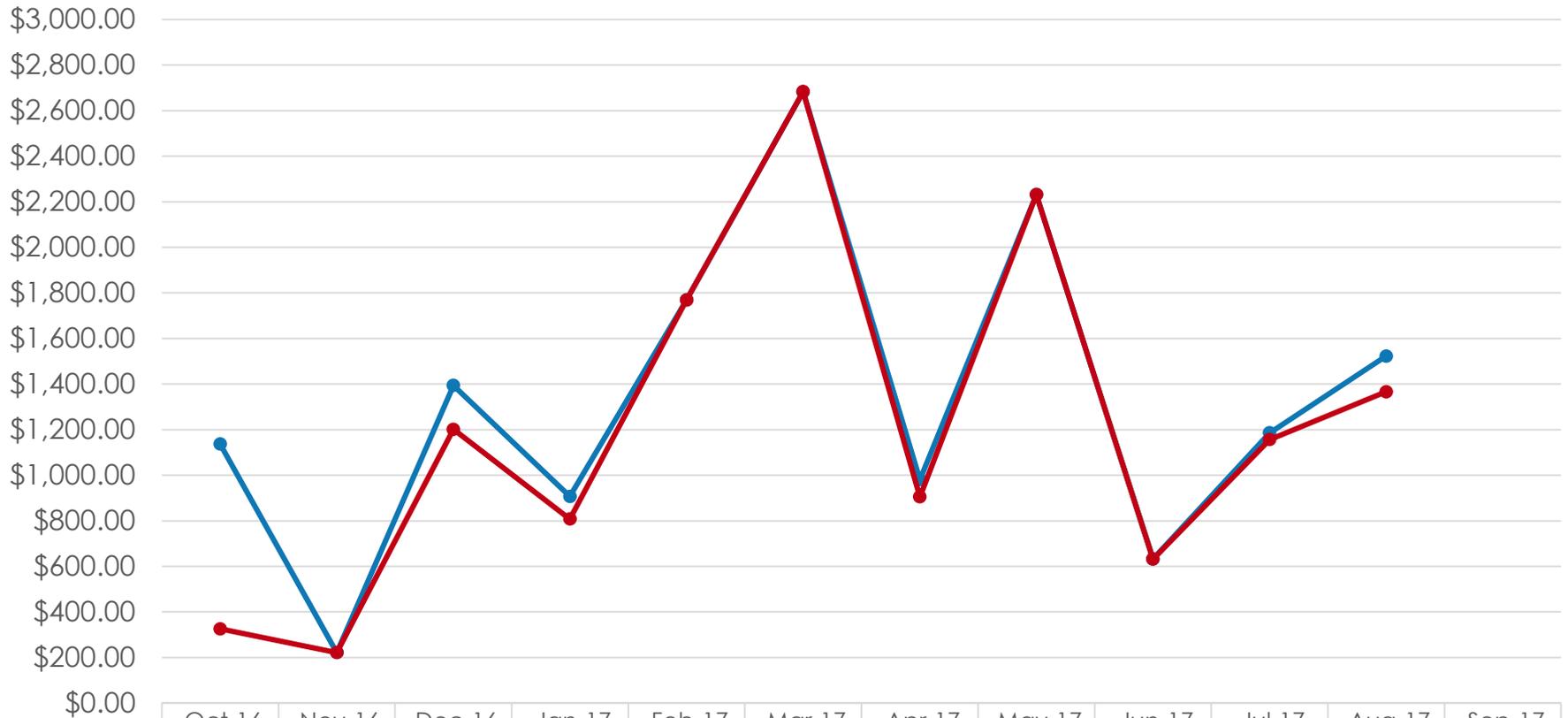
Accommodations Only



	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	\$638.52	\$673.59	\$847.76	\$884.76	\$709.04	\$749.69	\$694.68	\$548.86	\$501.17	\$611.86	\$876.47	
MEDIAN	\$513.00	\$417.00	\$515.00	\$739.00	\$420.00	\$398.00	\$588.00	\$357.00	\$406.00	\$578.00	\$911.00	

Prepaid- FY2017 Tracking

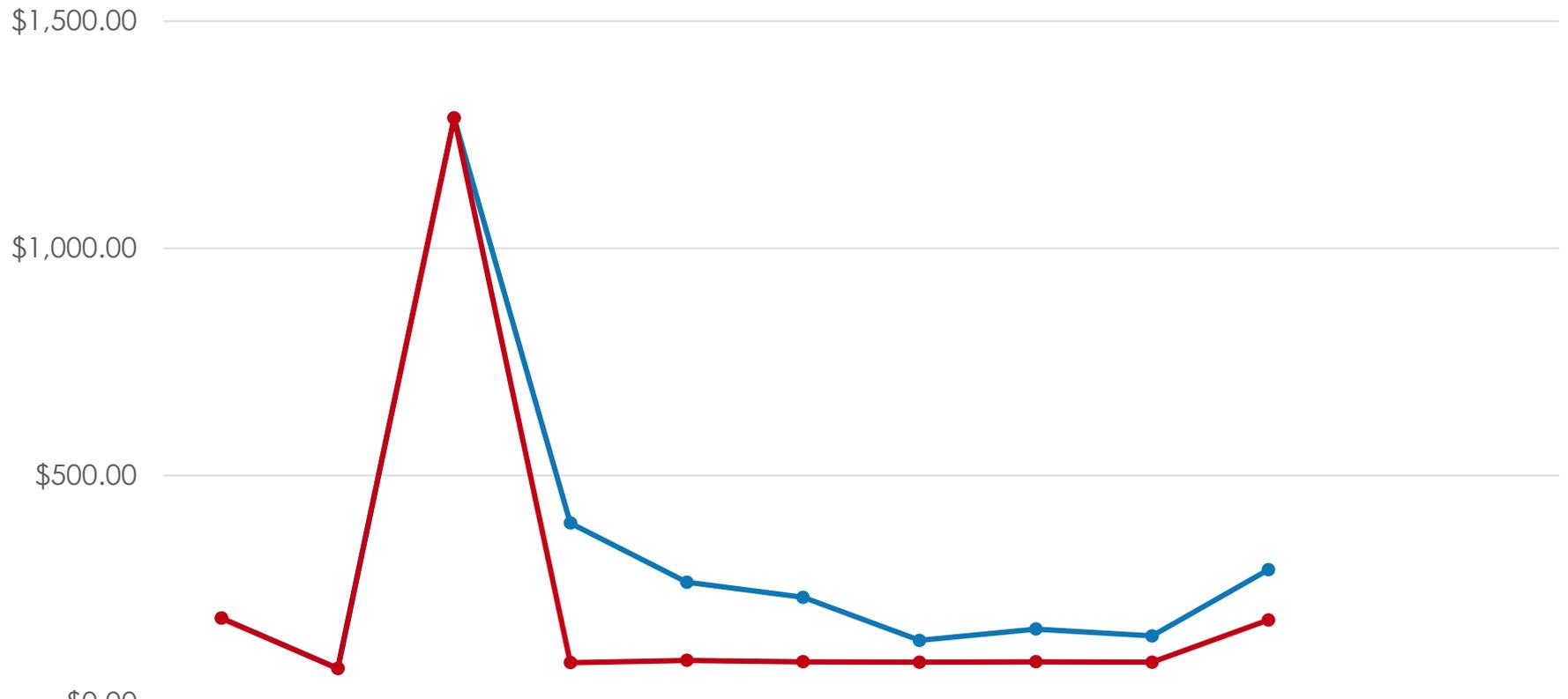
Accommodations w/ Meal Only



	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	\$1,522.66	
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	\$1,366.00	

Prepaid- FY2017 Tracking

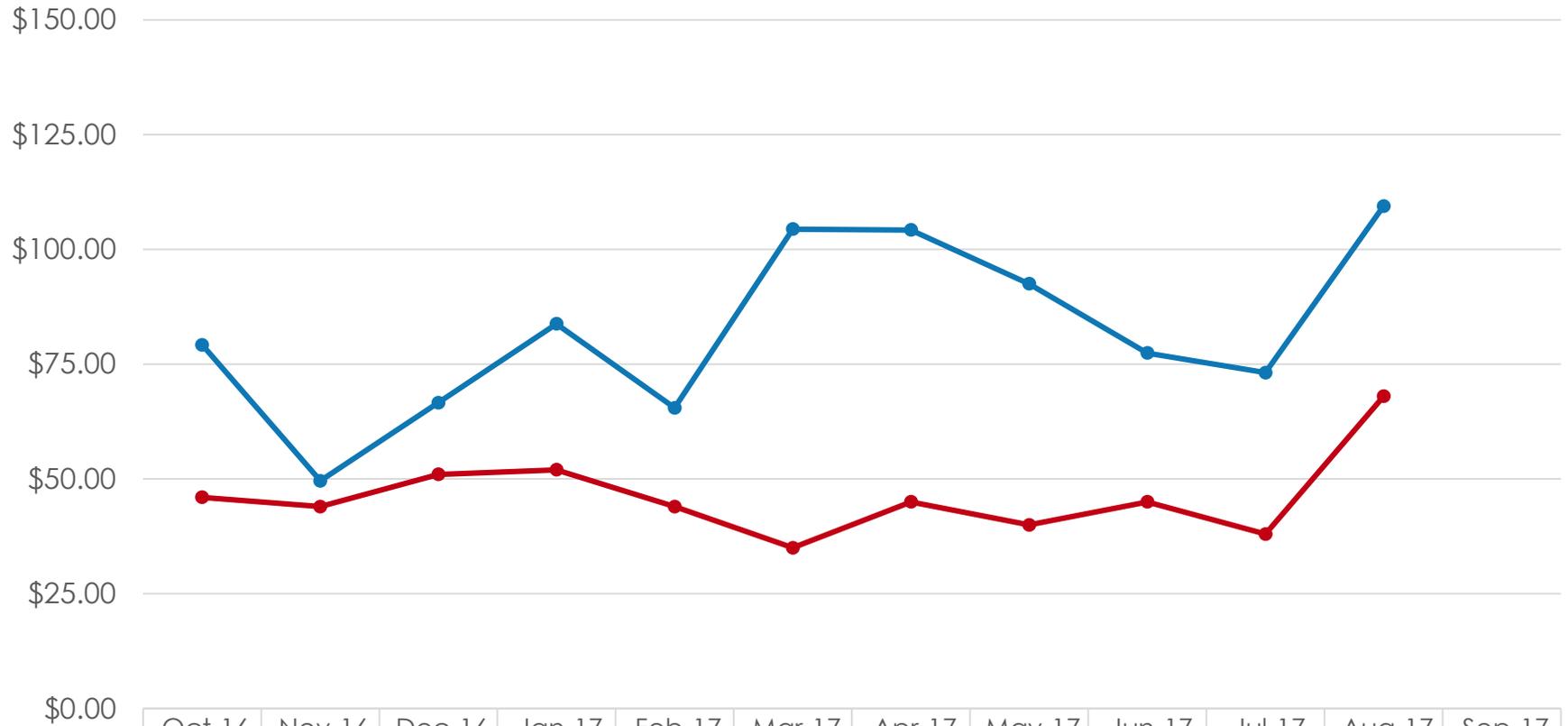
Food & Beverage in Hotel



	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	\$186.43	\$75.43	\$1,286.78	\$395.18	\$264.96	\$231.88	\$136.92	\$161.82	\$146.89	\$292.81		
MEDIAN	\$186.00	\$75.00	\$1,287.00	\$88.00	\$93.00	\$90.00	\$89.00	\$90.00	\$89.00	\$182.00		

Prepaid- FY2017 Tracking

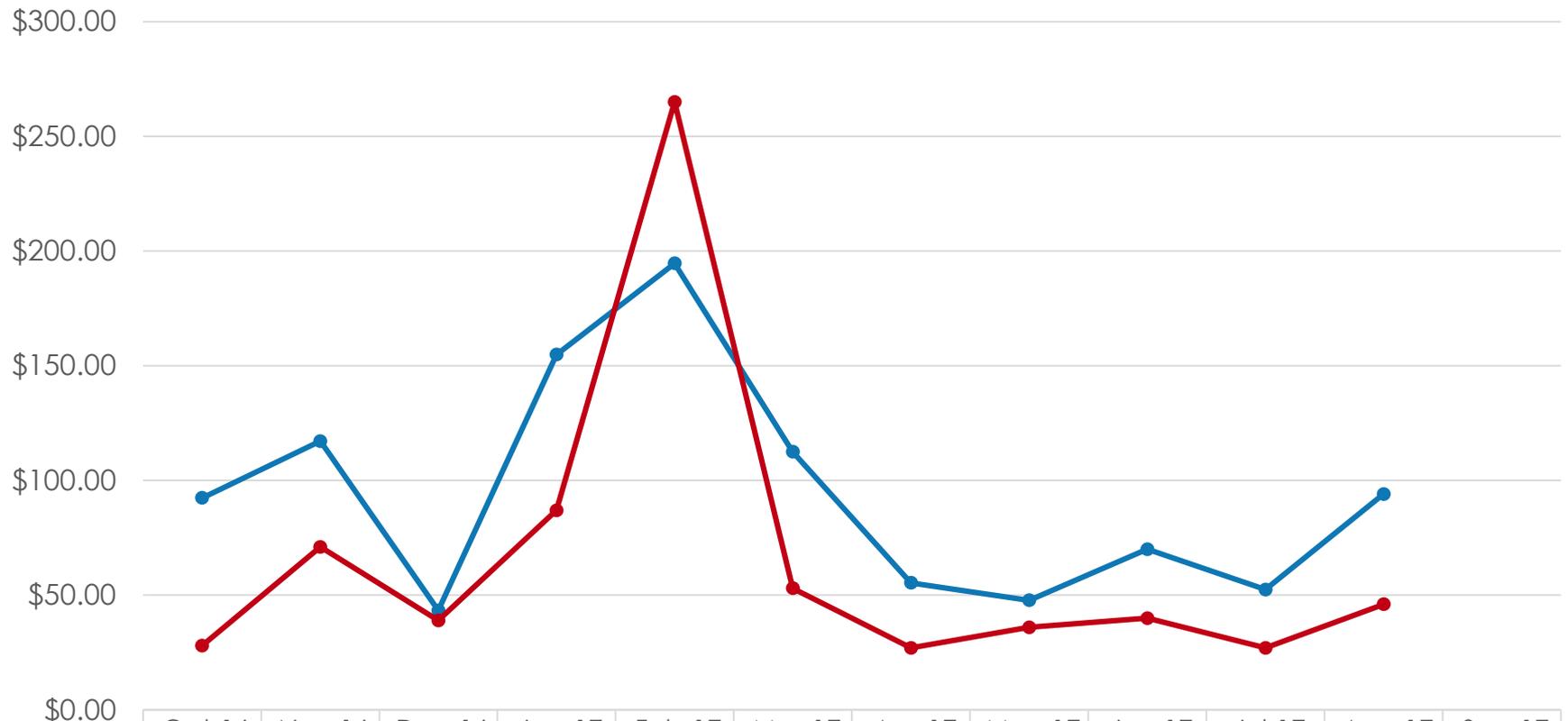
Ground Transportation - Japan



	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	\$79.20	\$49.60	\$66.60	\$83.79	\$65.50	\$104.42	\$104.22	\$92.52	\$77.43	\$73.15	\$109.42	
MEDIAN	\$46.00	\$44.00	\$51.00	\$52.00	\$44.00	\$35.00	\$45.00	\$40.00	\$45.00	\$38.00	\$68.00	

Prepaid- FY2017 Tracking

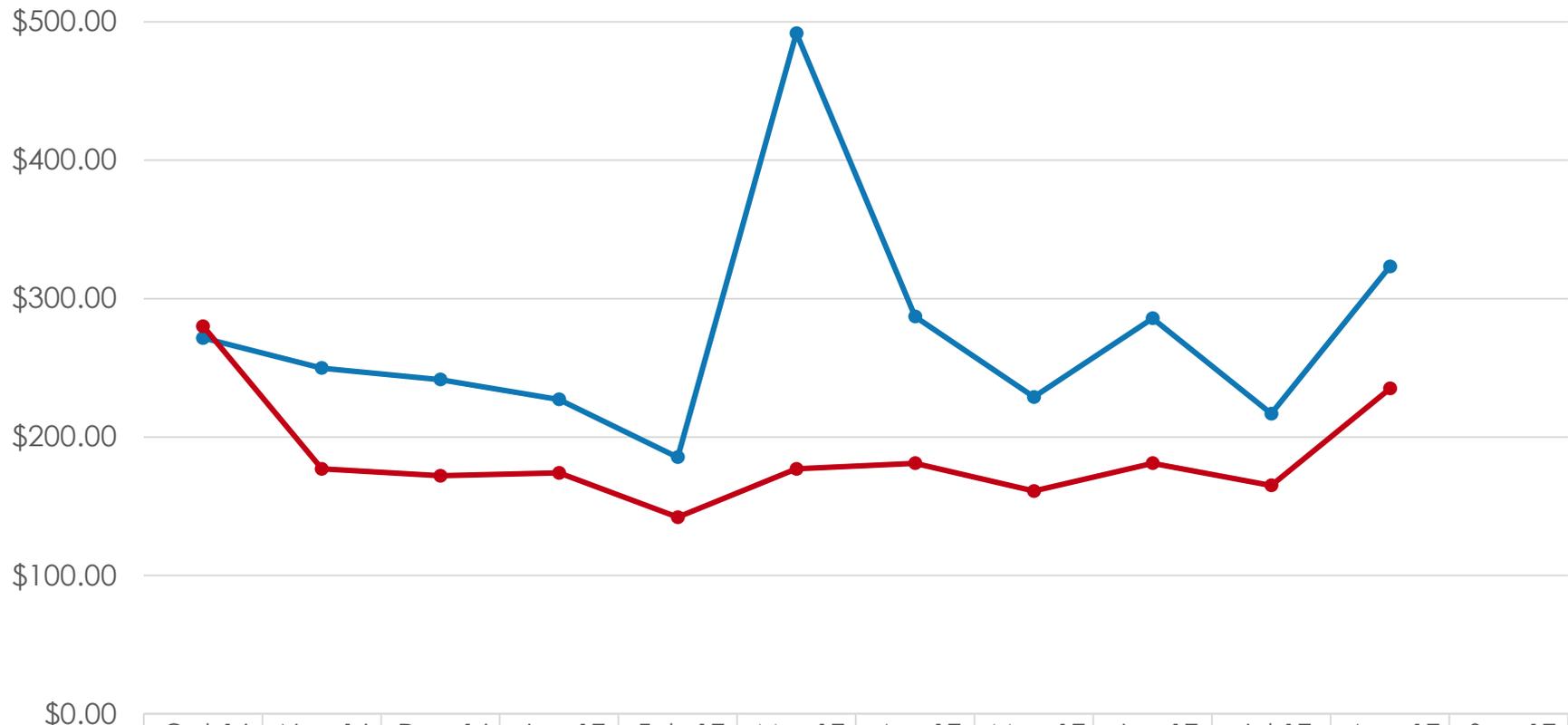
Ground Transportation - Guam



	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	\$94.08	
MEDIAN	\$28.00	\$71.00	\$39.00	\$87.00	\$265.00	\$53.00	\$27.00	\$36.00	\$40.00	\$27.00	\$46.00	

Prepaid- FY2017 Tracking

Optional tours/ Activities



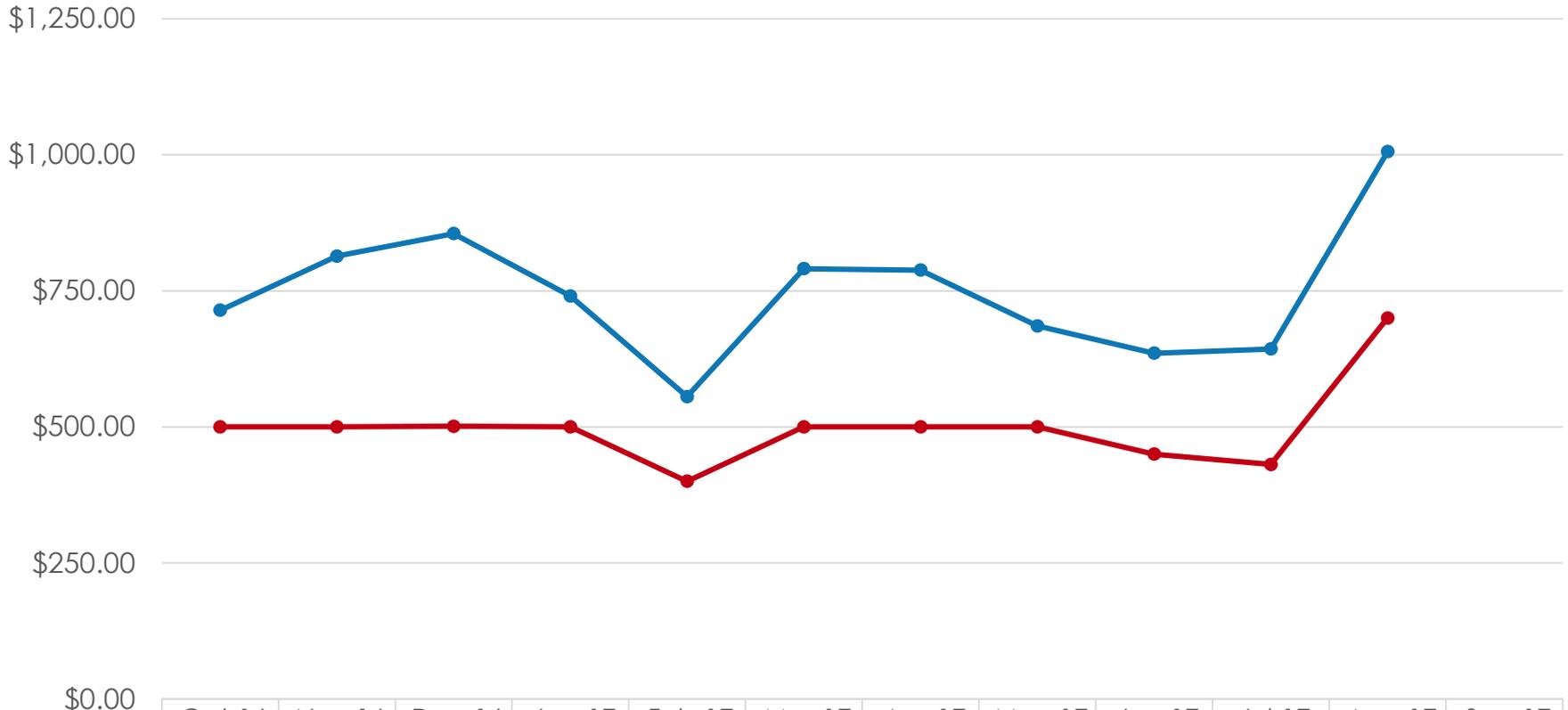
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
MEAN	\$271.44	\$249.81	\$241.44	\$227.10	\$185.40	\$491.76	\$286.97	\$228.94	\$285.72	\$216.83	\$323.19	
MEDIAN	\$280.00	\$177.00	\$172.00	\$174.00	\$142.00	\$177.00	\$181.00	\$161.00	\$181.00	\$165.00	\$235.00	

On-Island Expenditures

- \$1,005.63 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$423.52 = overall mean average per person prepaid expenditures

On-Island Entire Travel Party – FY2017

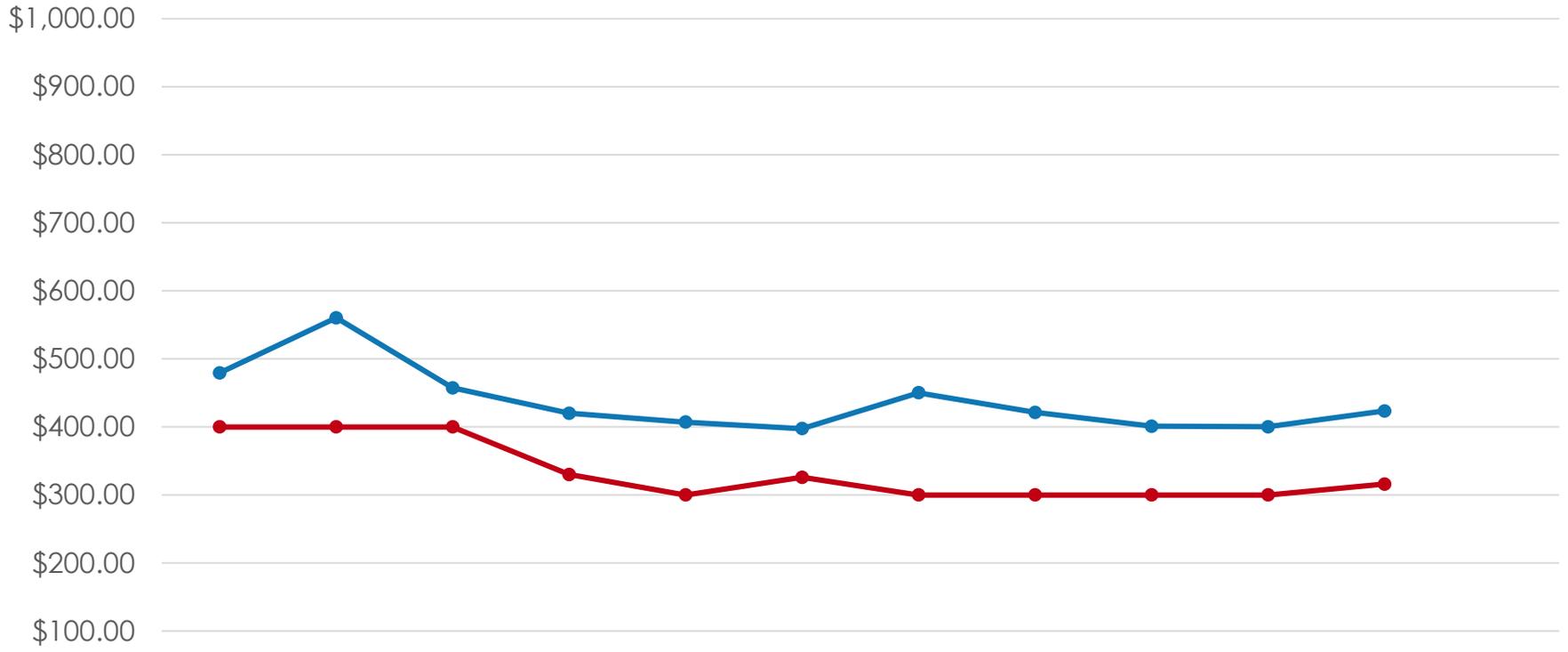
Tracking



	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	\$1,005.6	
MEDIAN	\$500.00	\$500.00	\$501.00	\$500.00	\$400.00	\$500.00	\$500.00	\$500.00	\$450.00	\$431.00	\$700.00	

On-Island 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	\$479.47	\$560.29	\$457.40	\$420.06	\$407.07	\$397.44	\$450.12	\$421.34	\$401.05	\$400.11	\$423.52	
MEDIAN	\$400.00	\$400.00	\$400.00	\$330.00	\$300.00	\$326.00	\$300.00	\$300.00	\$300.00	\$300.00	\$316.00	

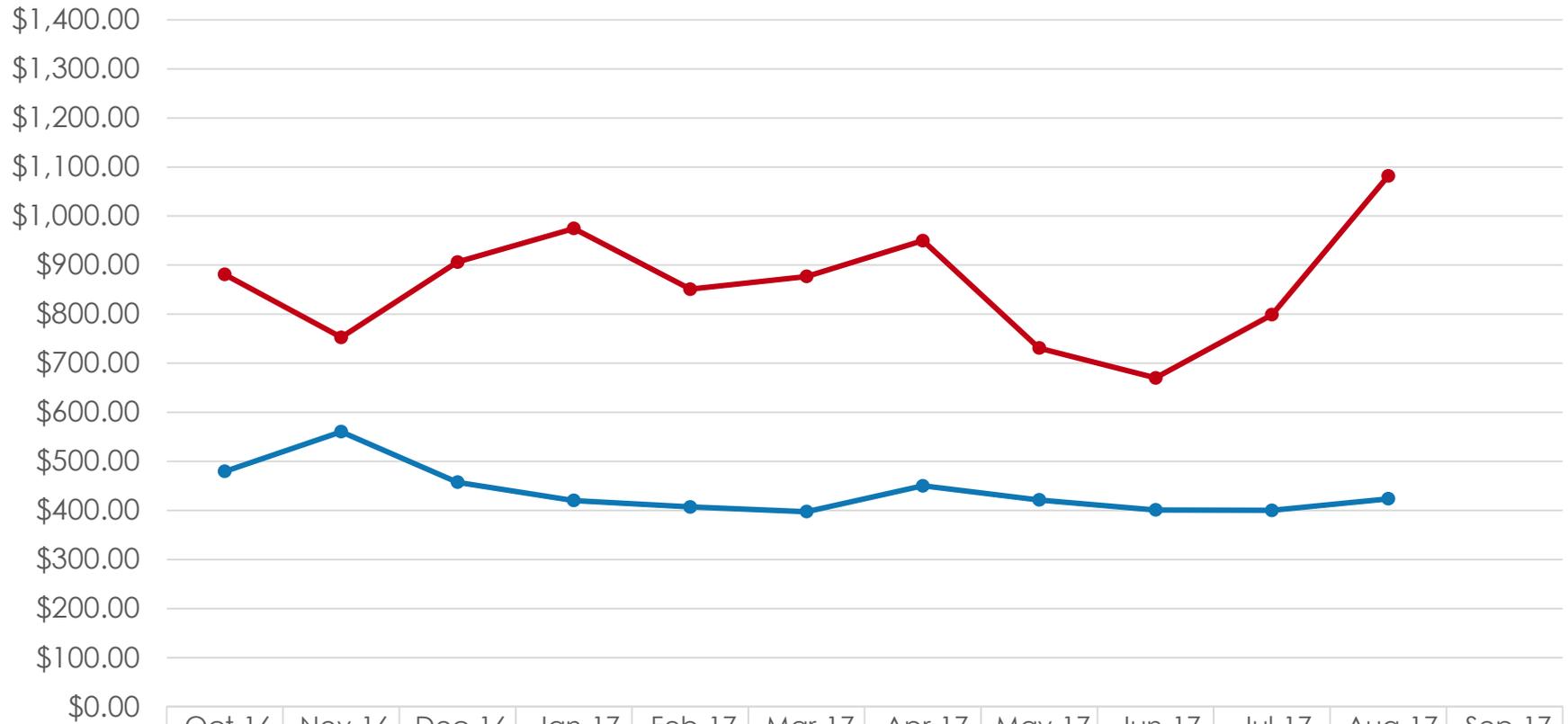
On-Island Per Person – Key Segments

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

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
ONISLE PER PERSON	Mean	\$423.52	\$412.54	\$446.85	\$468.05	\$686.33	.	\$450.00	\$385.50
	Median	\$316	\$300	\$325	\$300	\$304	.	\$425	\$300

Prepared by Anthology Research

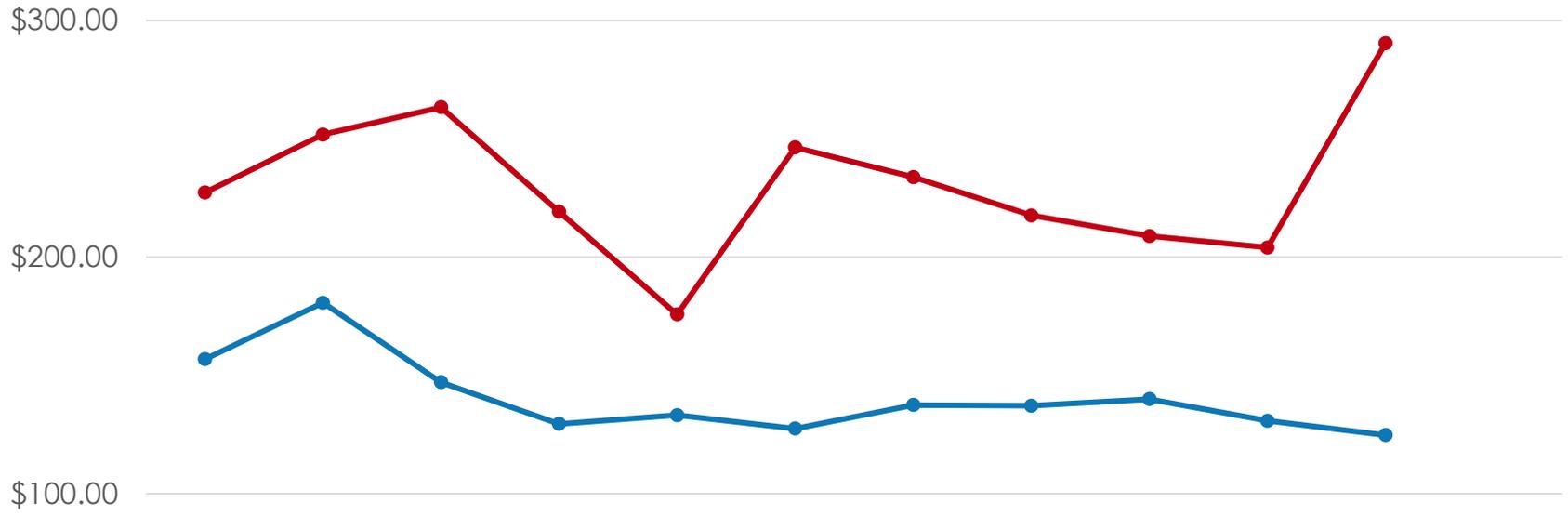
Per Person MEAN expenditures – FY2017 Tracking On-Island/ Prepaid



	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
On-Island	\$479.47	\$560.29	\$457.40	\$420.06	\$407.07	\$397.44	\$450.12	\$421.34	\$401.05	\$400.11	\$423.52	
Prepaid	\$880.84	\$752.63	\$906.16	\$974.56	\$850.86	\$876.79	\$949.83	\$730.80	\$670.11	\$798.80	\$1,081.6	

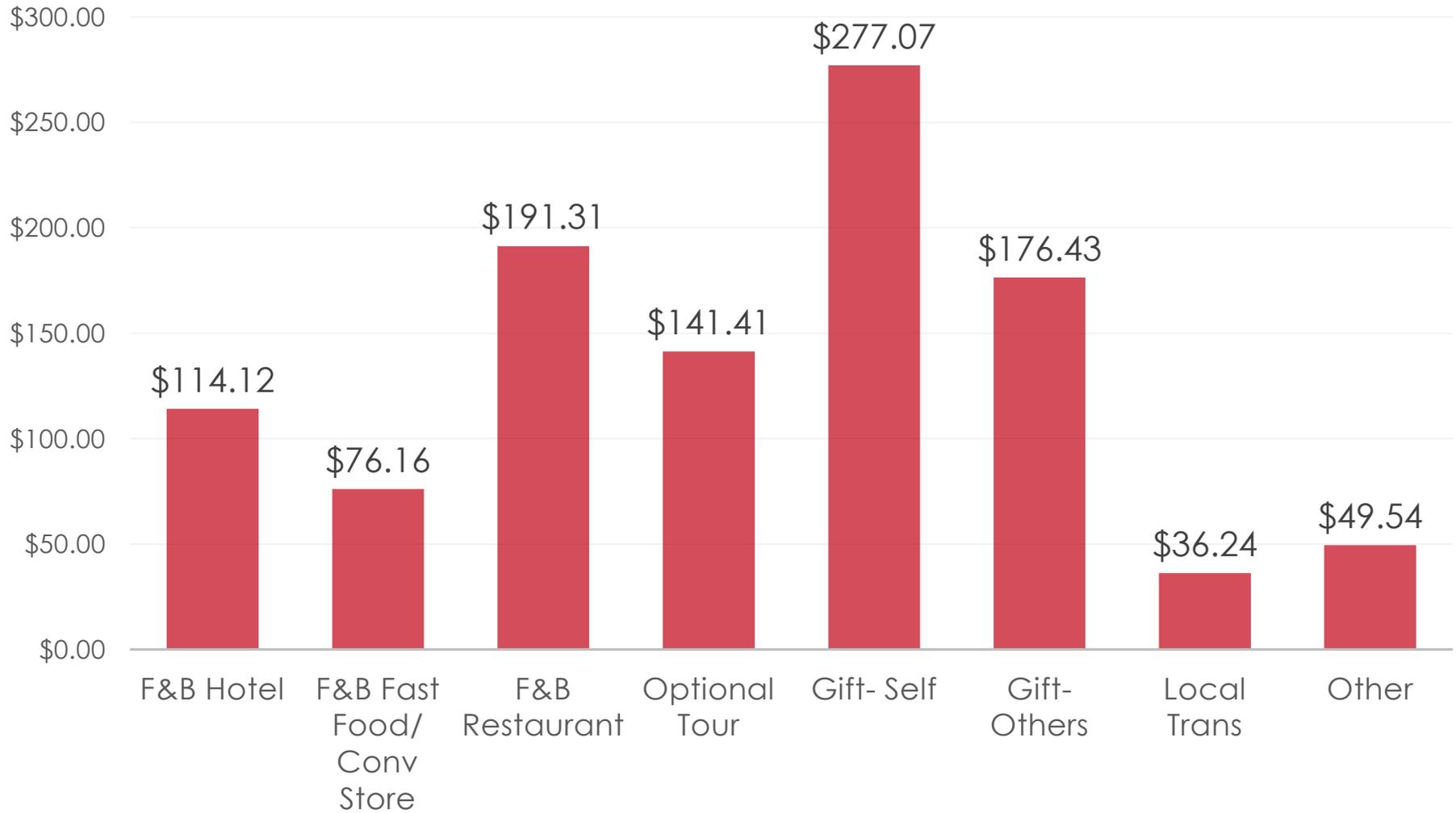
On-Island Per Day Spending – FY2017 Tracking

MEAN



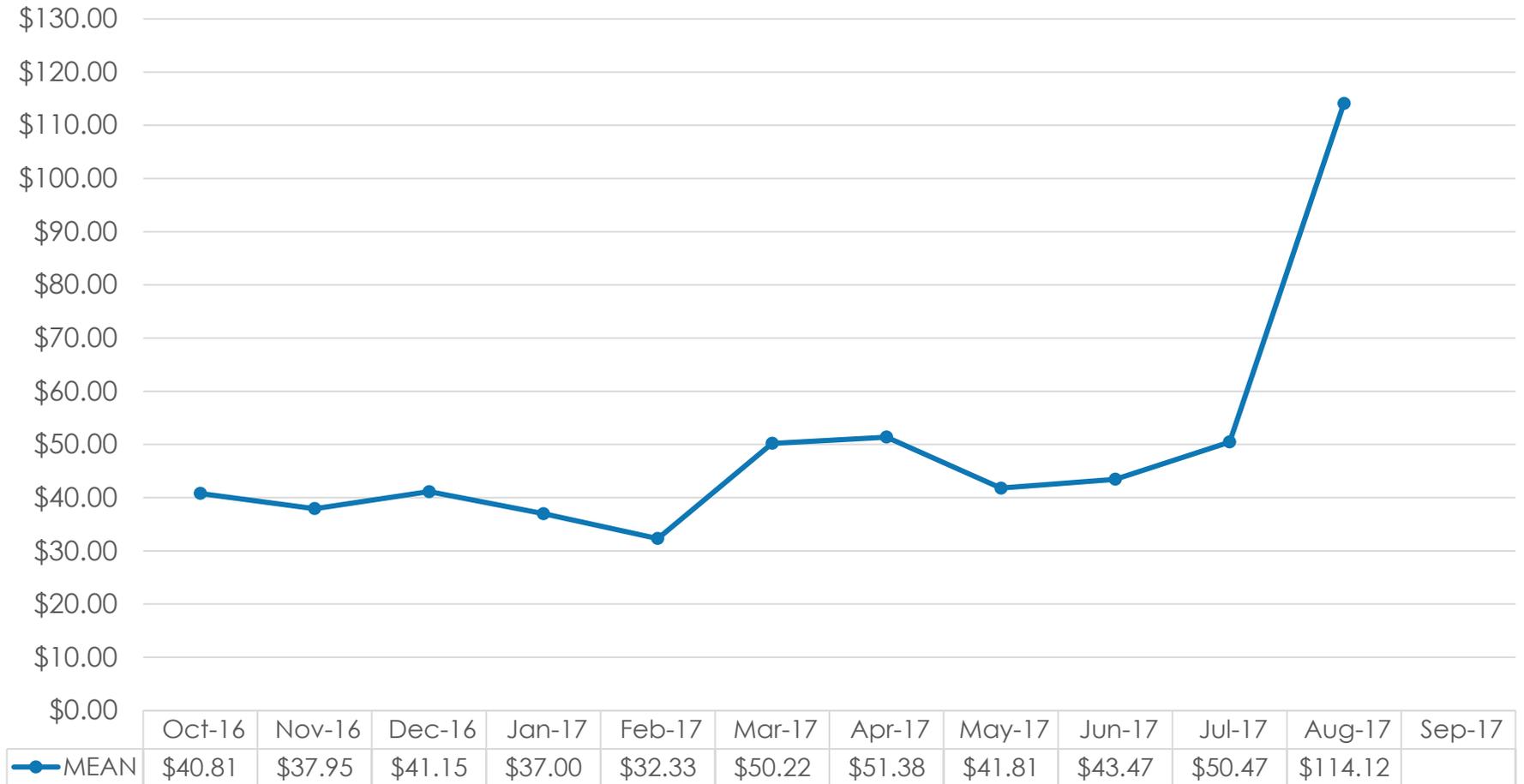
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
Per Person	\$156.83	\$180.75	\$147.13	\$129.56	\$133.21	\$127.56	\$137.53	\$137.24	\$140.03	\$130.88	\$124.81	
Travel Party	\$227.29	\$251.77	\$263.32	\$219.20	\$175.78	\$246.33	\$233.85	\$217.64	\$208.91	\$204.06	\$290.36	

On-Island Expenses by Category – Mean Entire Travel Party



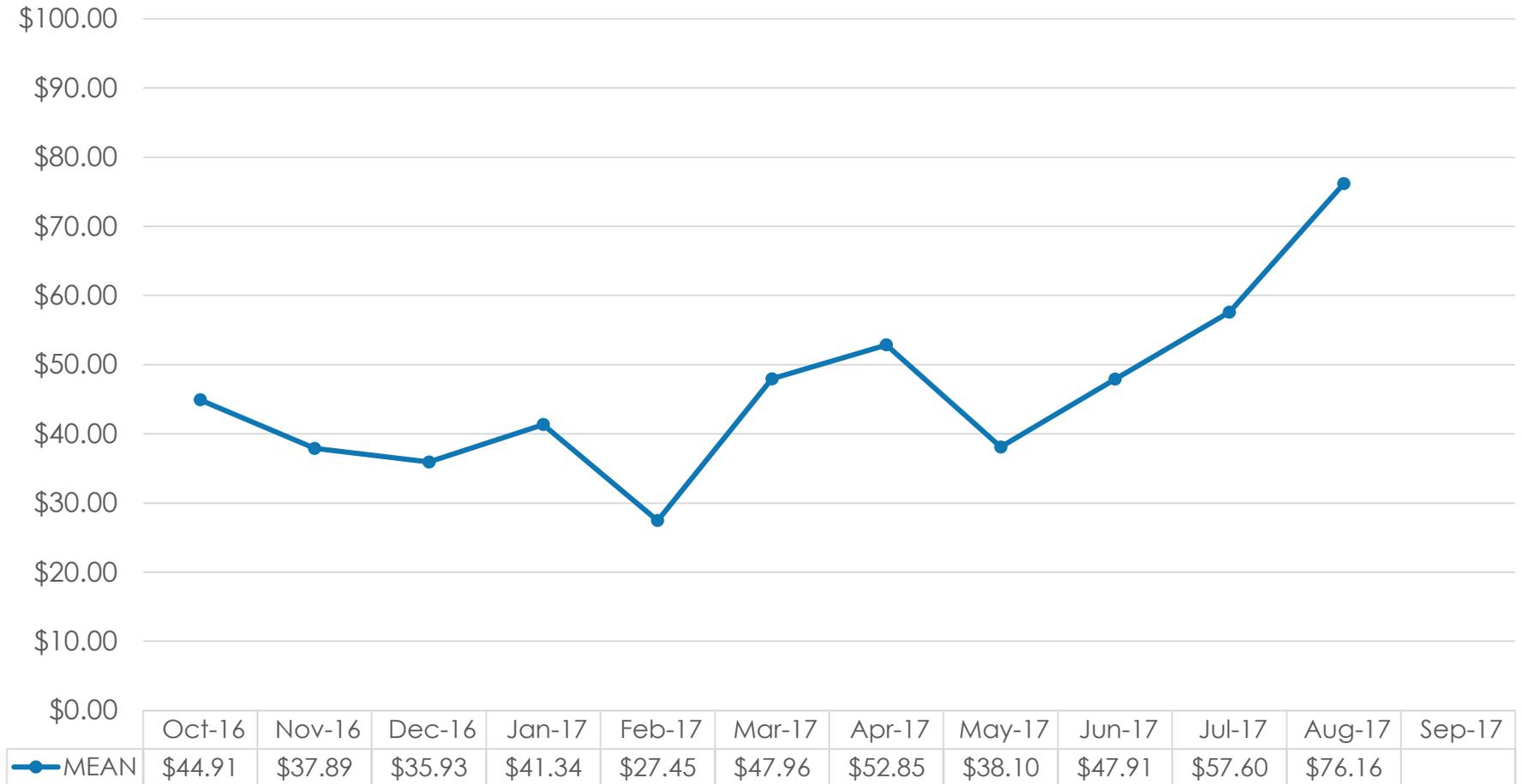
On-Island – FY2017 Tracking

Food & Beverage - Hotel



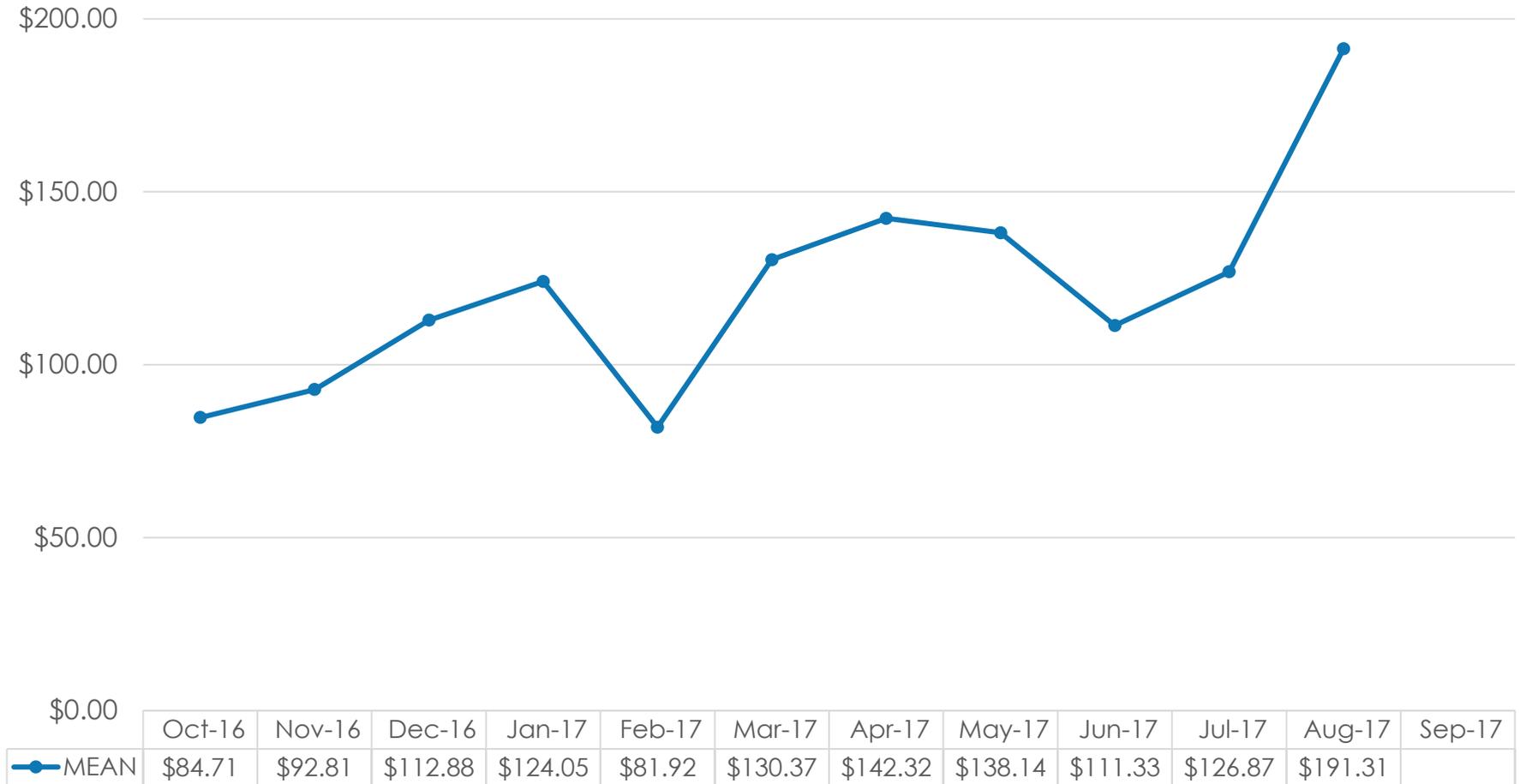
On-Island – FY2017 Tracking

Food & Beverage – Fast Food/ Convenience Store



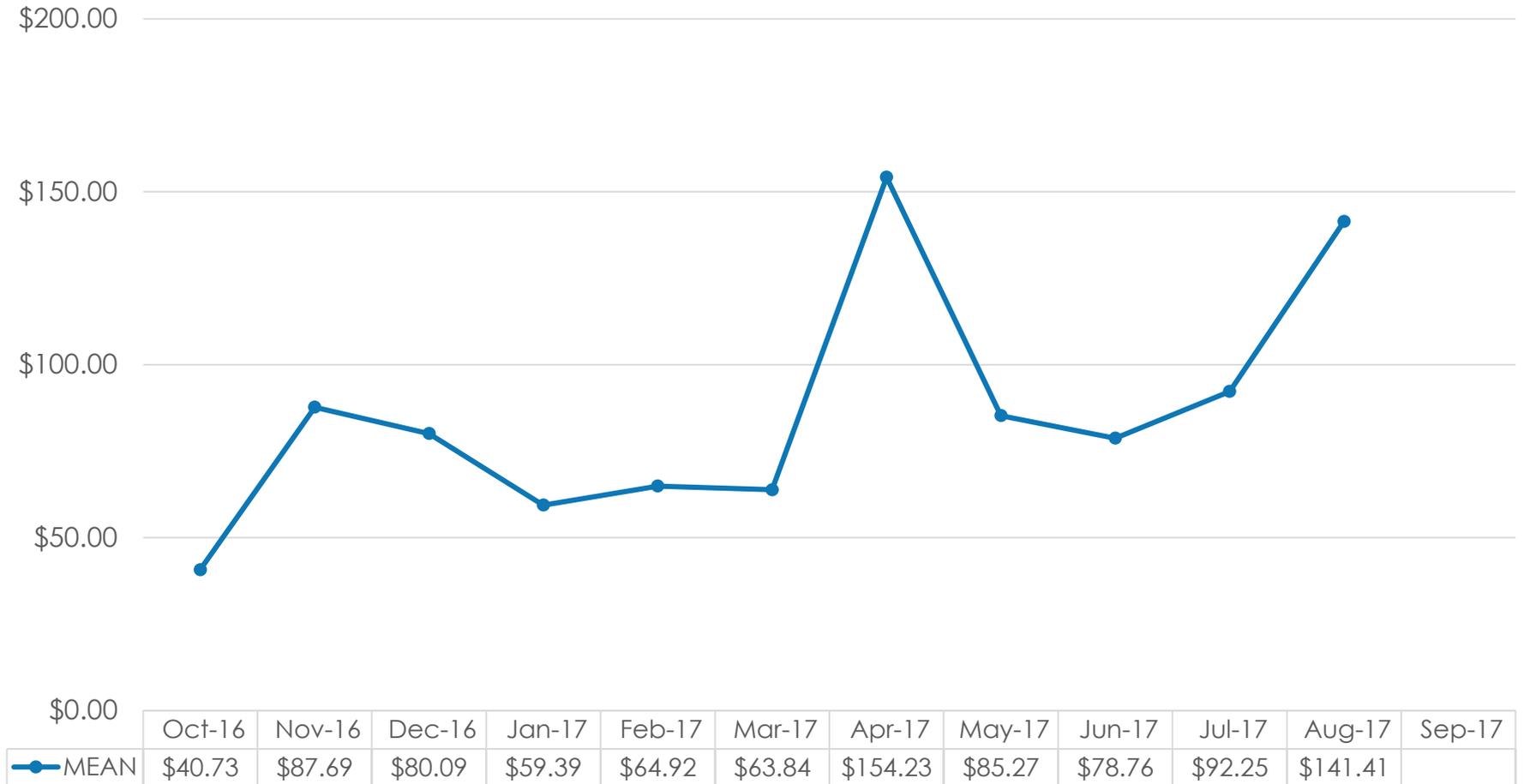
On-Island – FY2017 Tracking

Food & Beverage – Restaurant/ Drinking Est Outside Hotel



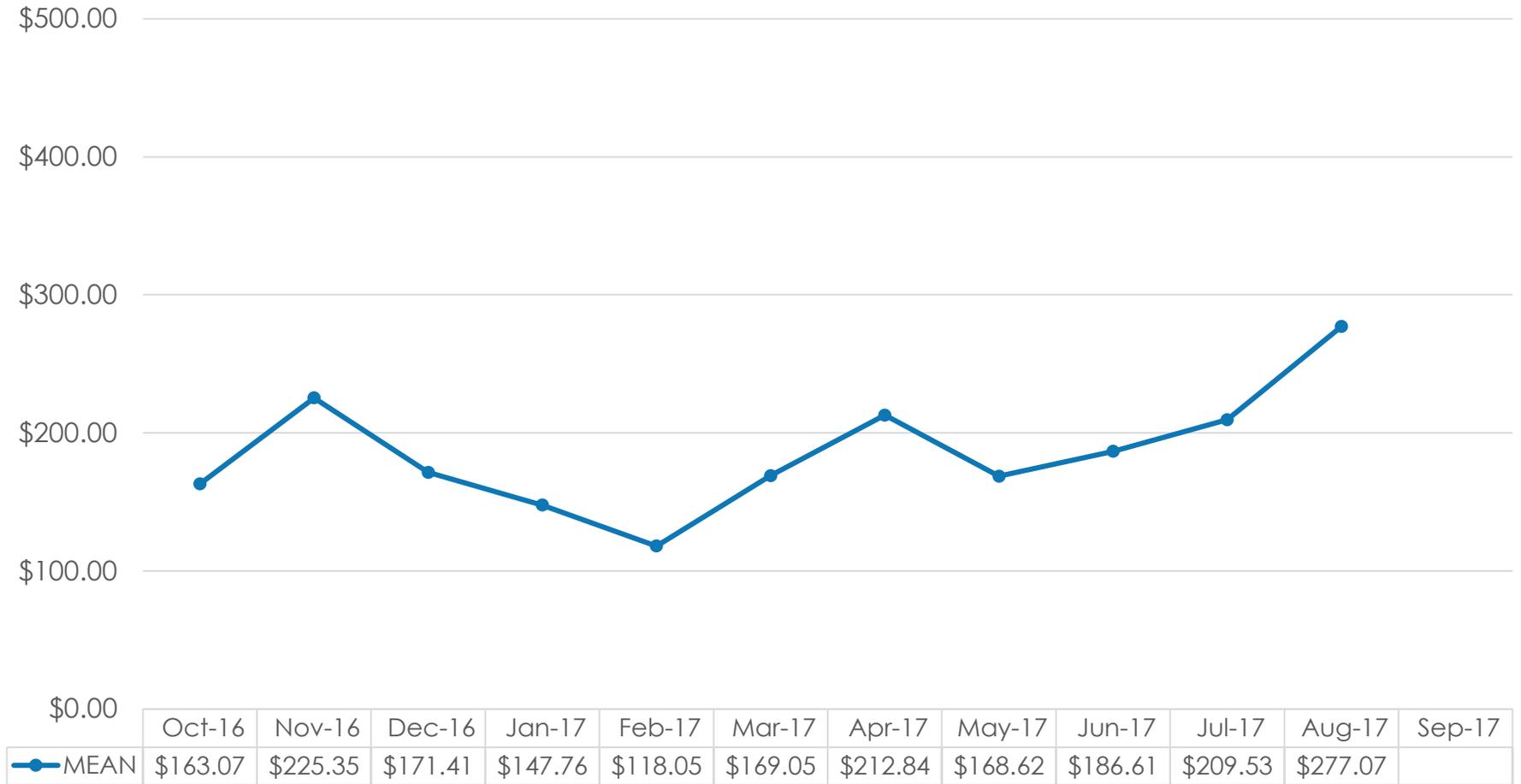
On-Island – FY2017 Tracking

Optional tour/ Activities



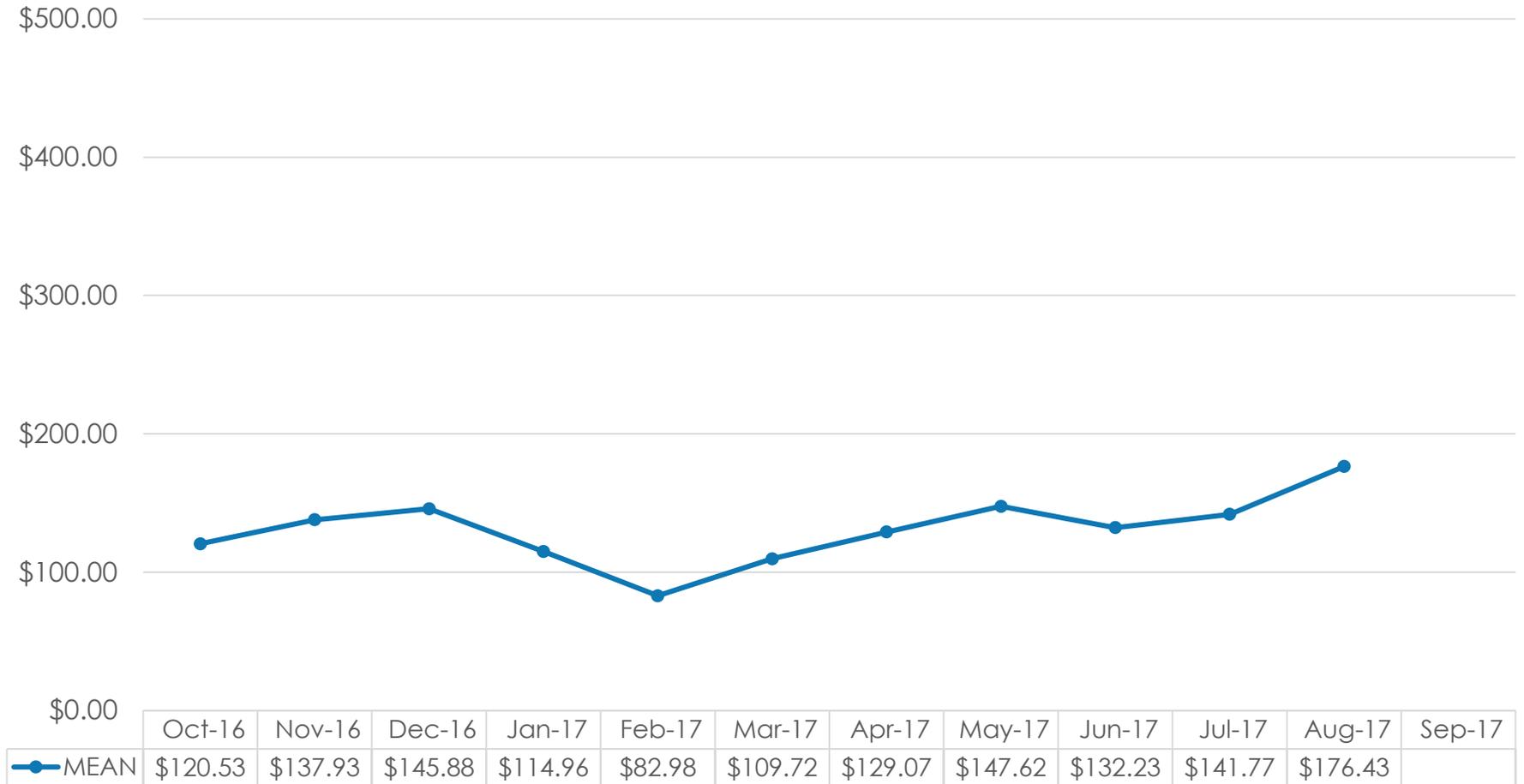
On-Island – FY2017 Tracking

Gift/ Souvenir – Self/ Companion



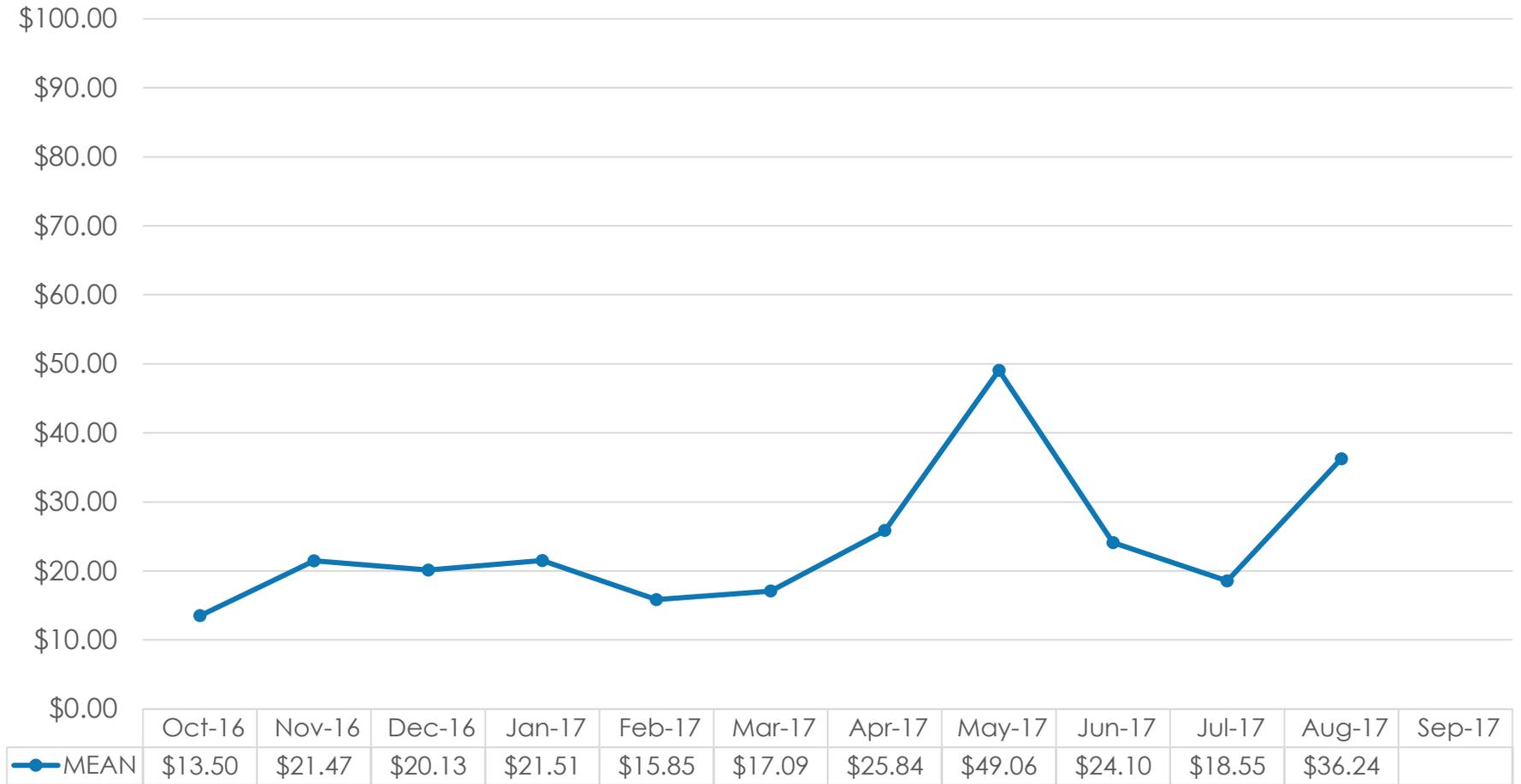
On-Island – FY2017 Tracking

Gift/ Souvenir – Friends/ Family



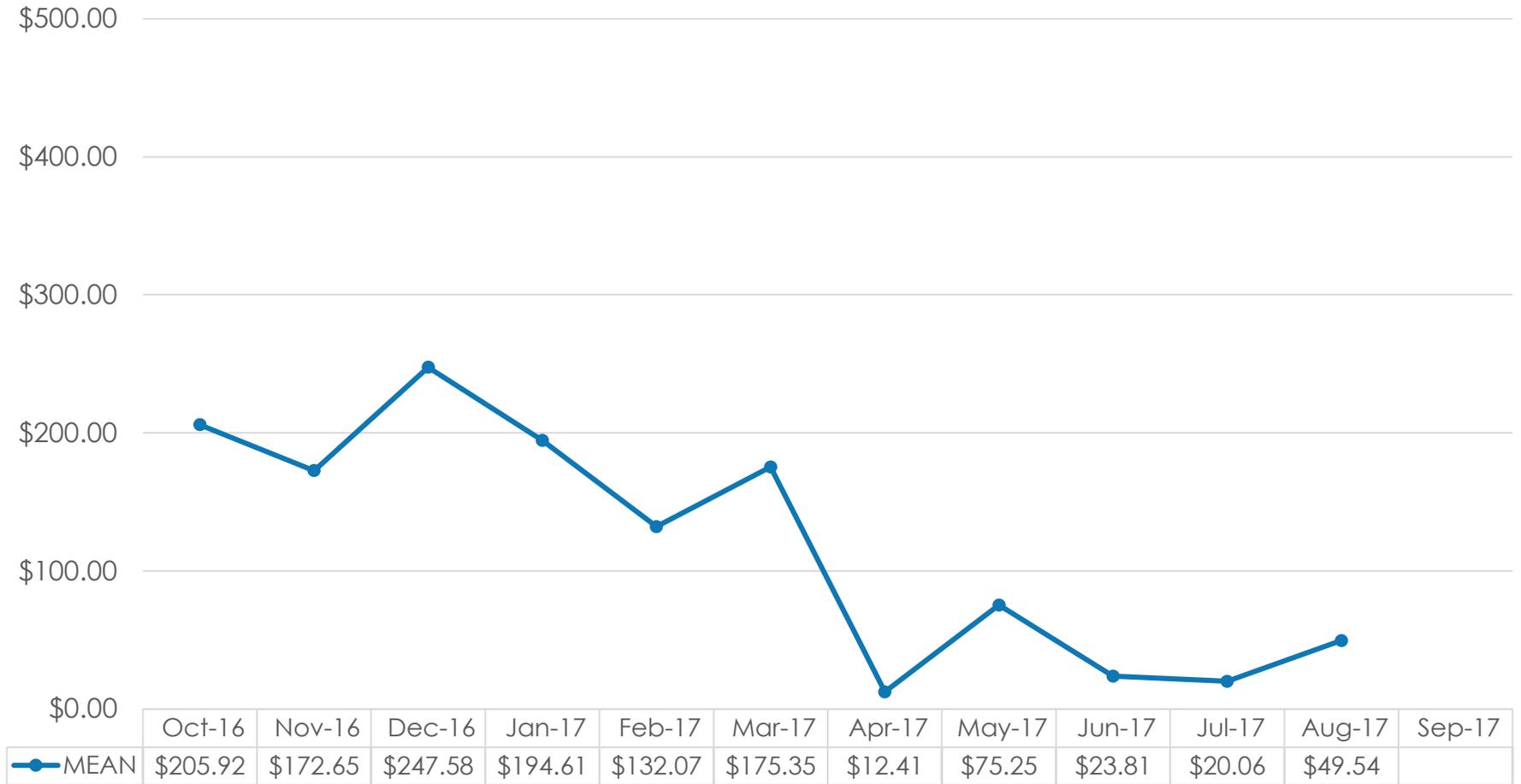
On-Island – FY2017 Tracking

Local Transportation



On-Island – FY2017 Tracking

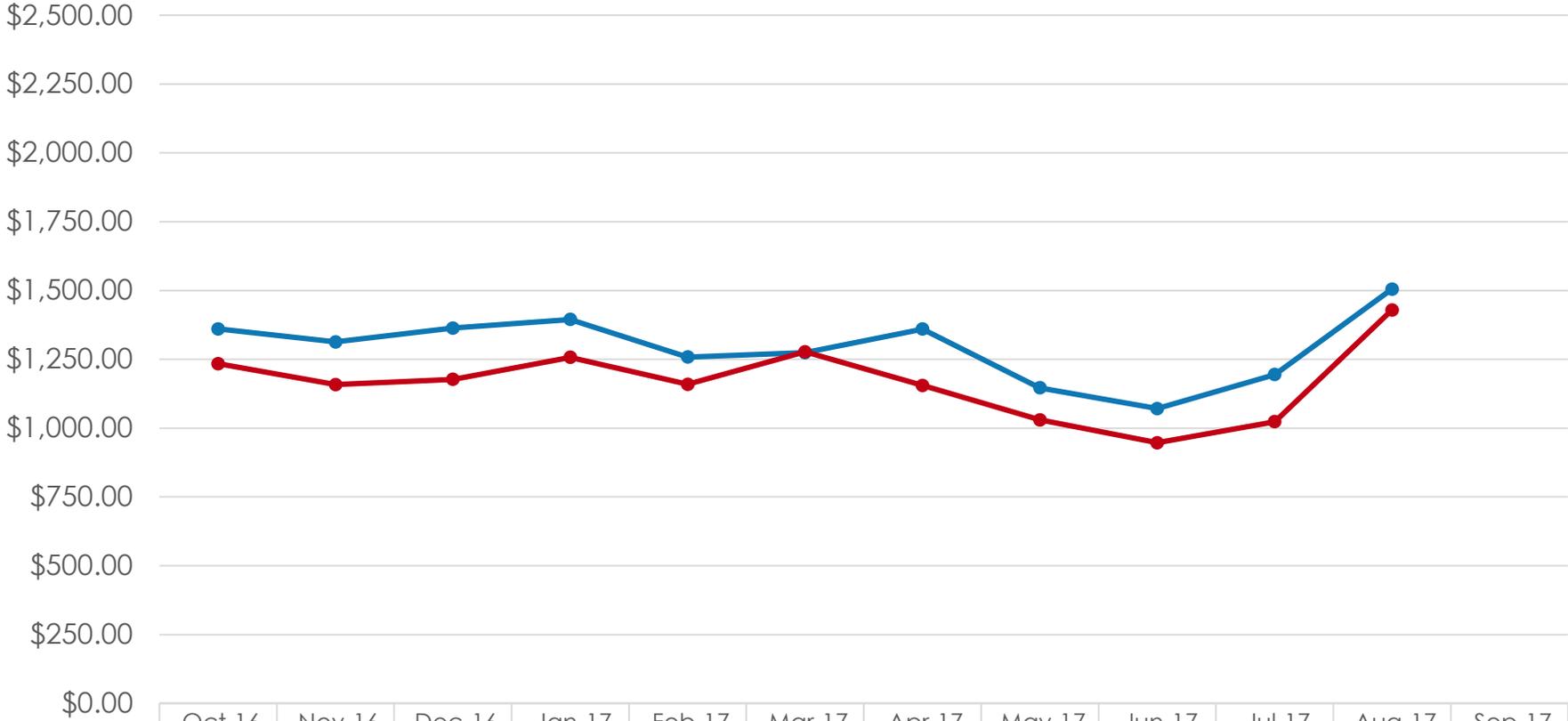
Other Not Included



TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,505.12 = 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	\$1,505.12	
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	\$1,429.00	

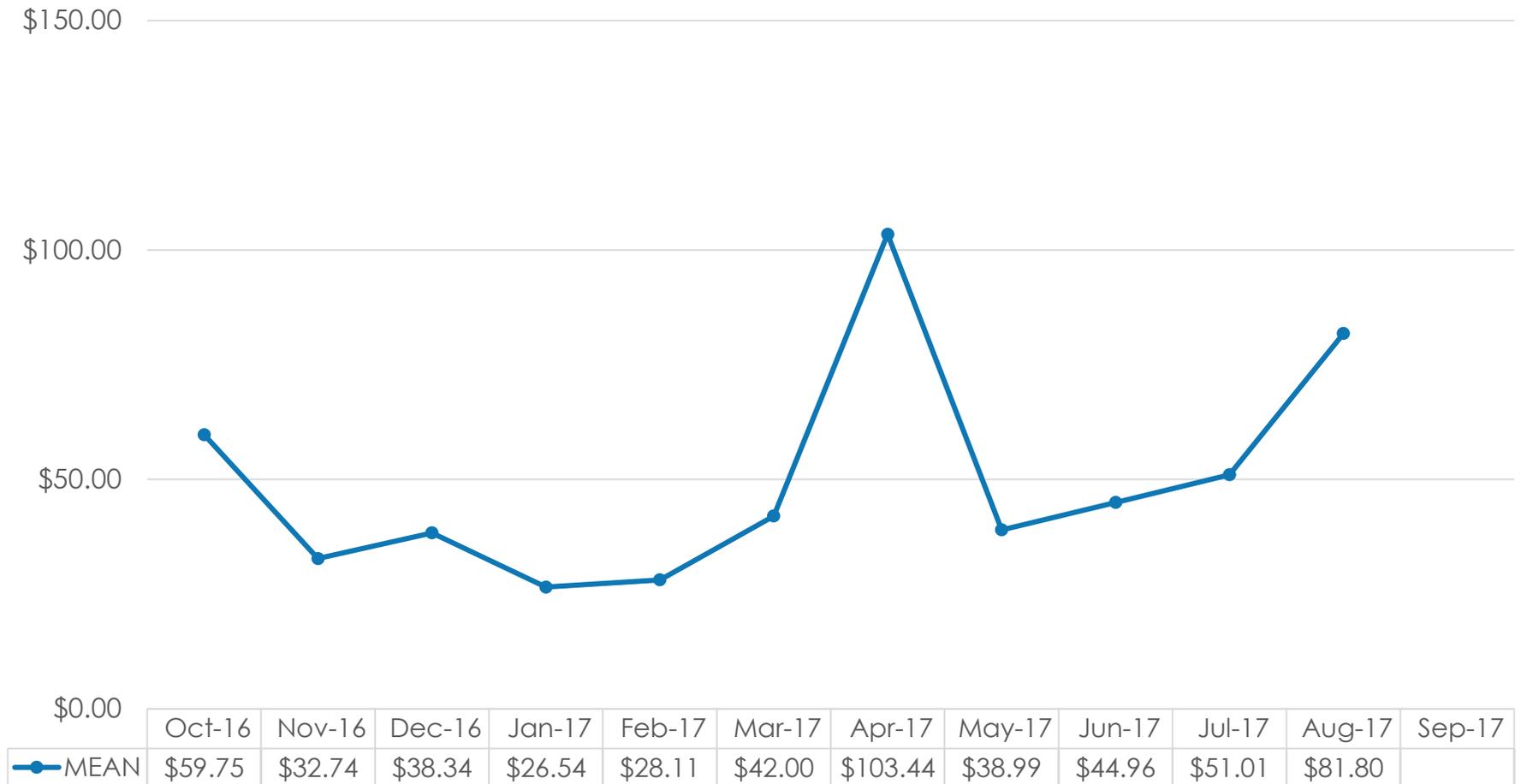
TOTAL Per Person Expenditures – Key Segments

**GVB EXIT SURVEY
TOTAL PER PERSON SPENDING**

		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,505.12	\$1,545.91	\$1,521.80	\$1,496.63	\$1,784.59	.	\$1,126.75	\$1,485.81
	Median	\$1,429	\$1,459	\$1,393	\$1,480	\$1,579	.	\$1,116	\$1,402

Prepared by Anthology Research

GUAM AIRPORT EXPENDITURE – FY2017 Tracking

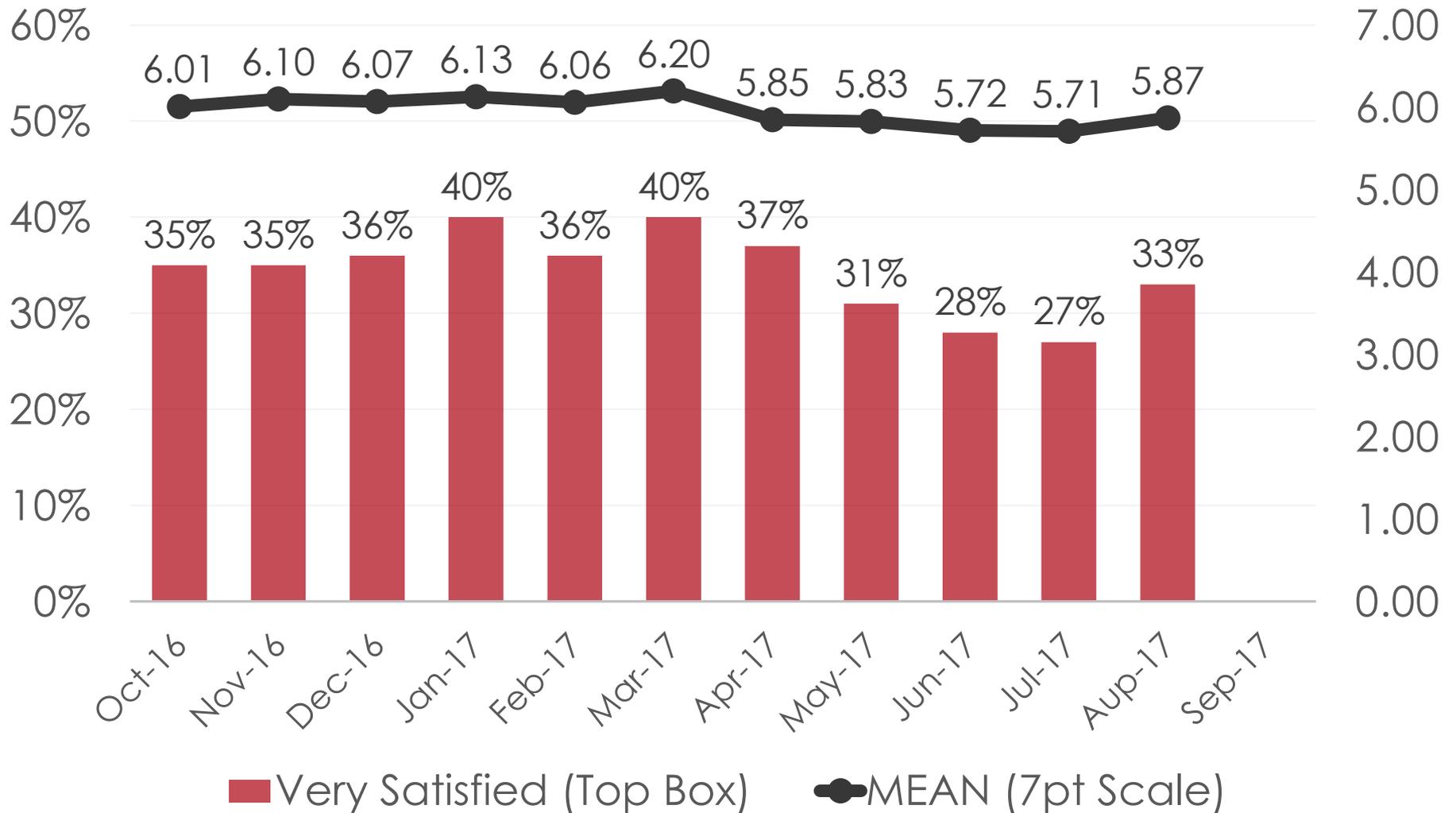


SECTION 4

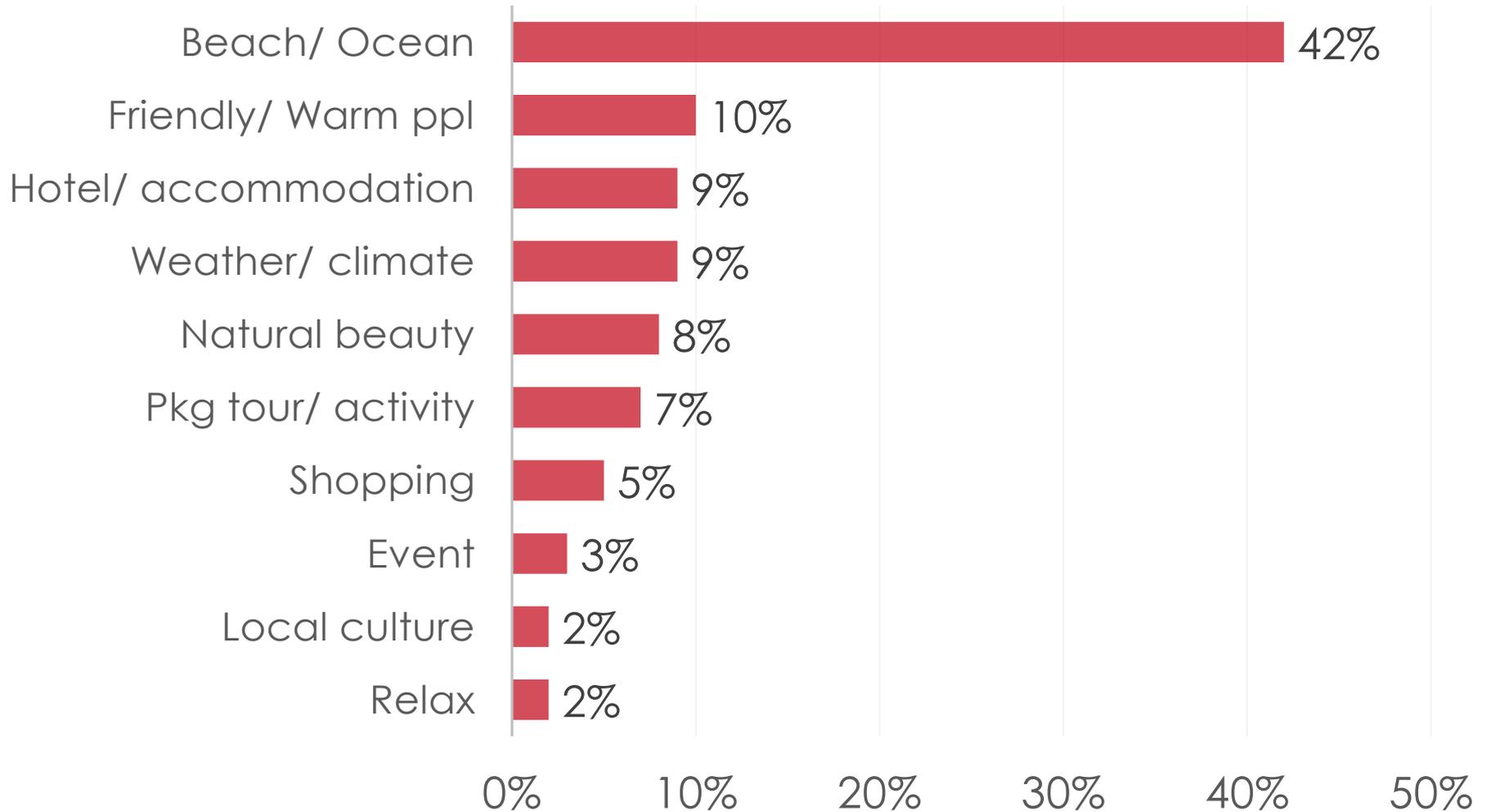
VISITOR SATISFACTION

BEHAVIOR

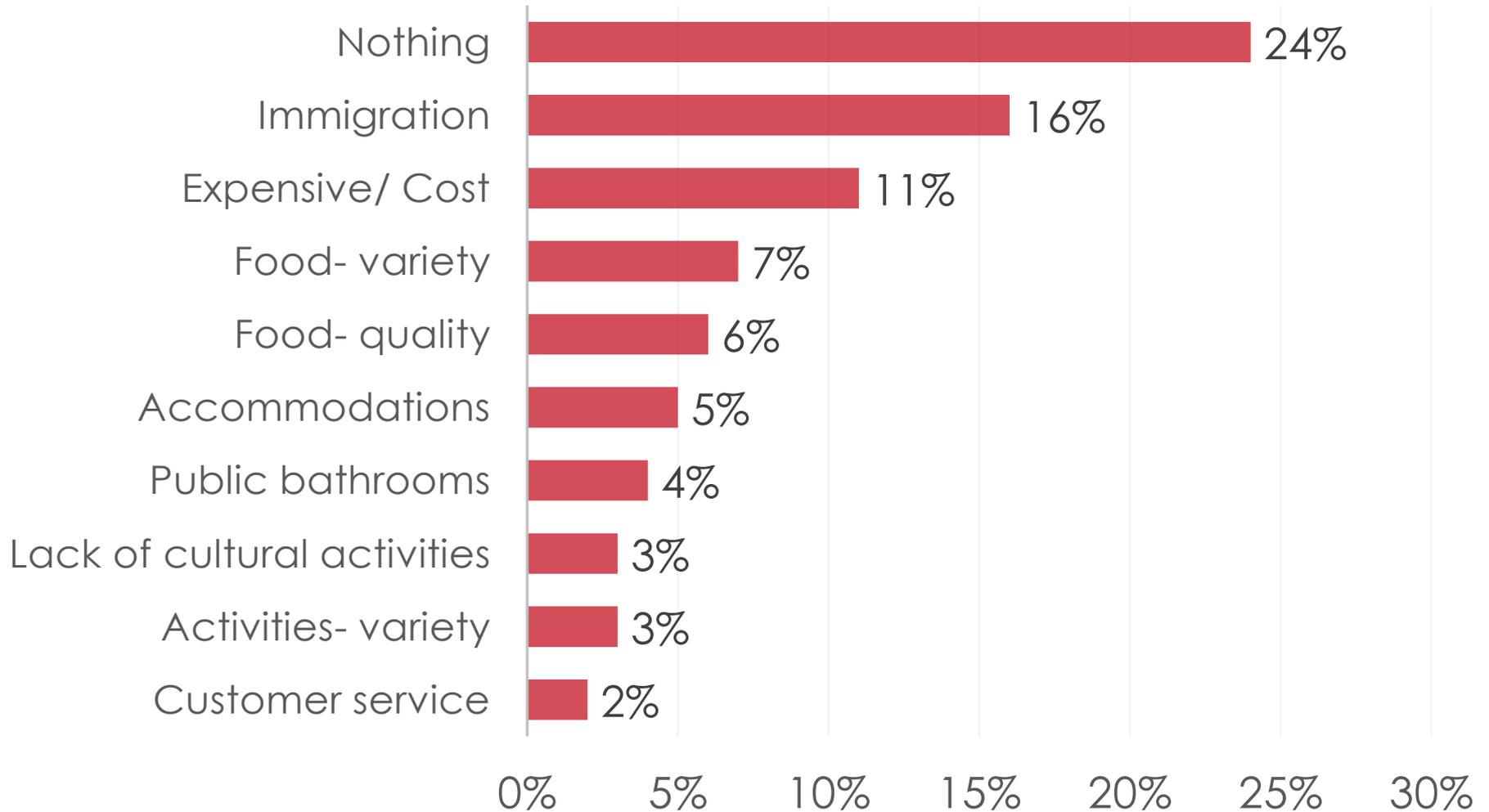
OVERALL SATISFACTION



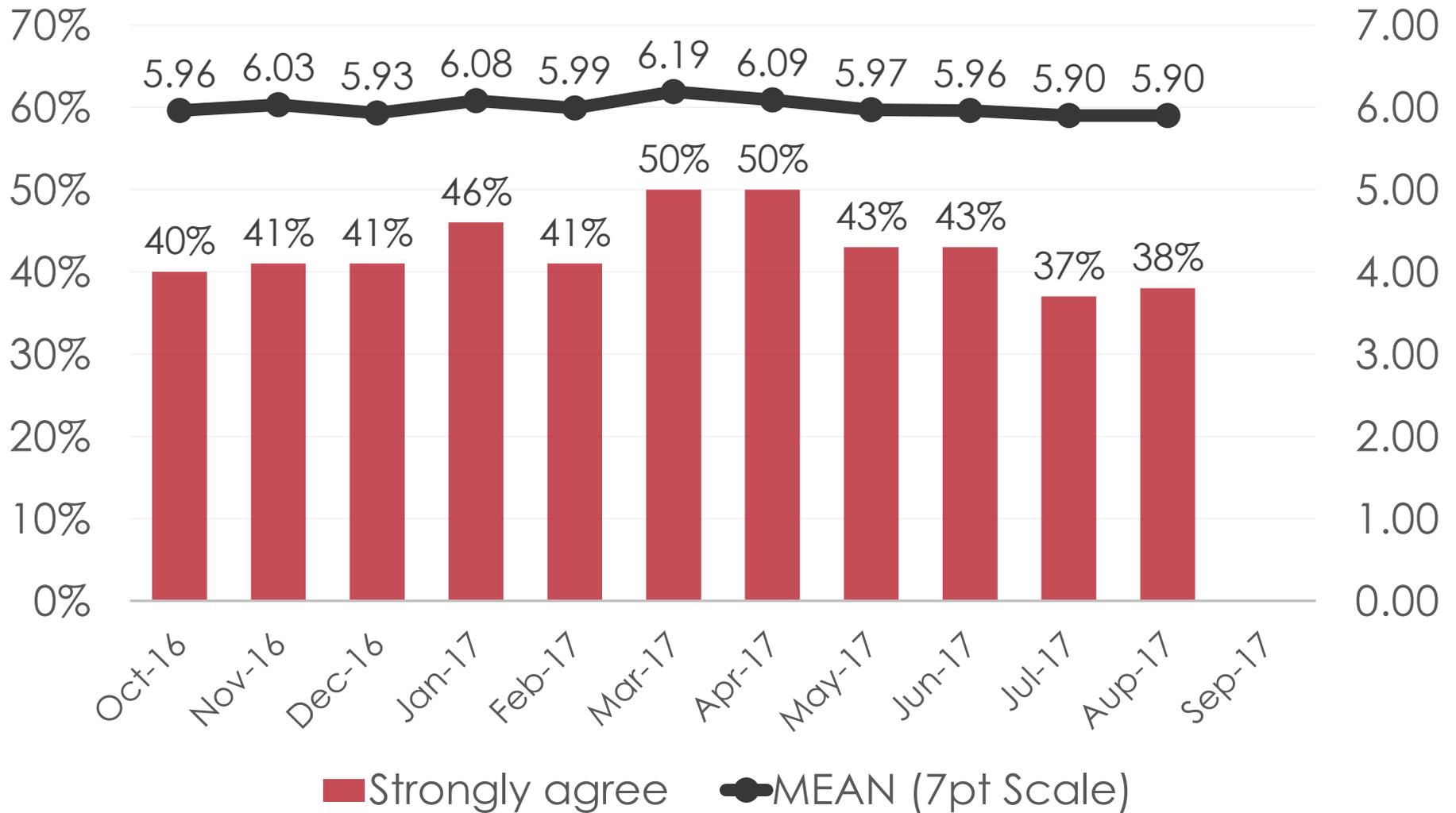
Positive aspects of trip (Top Reason)



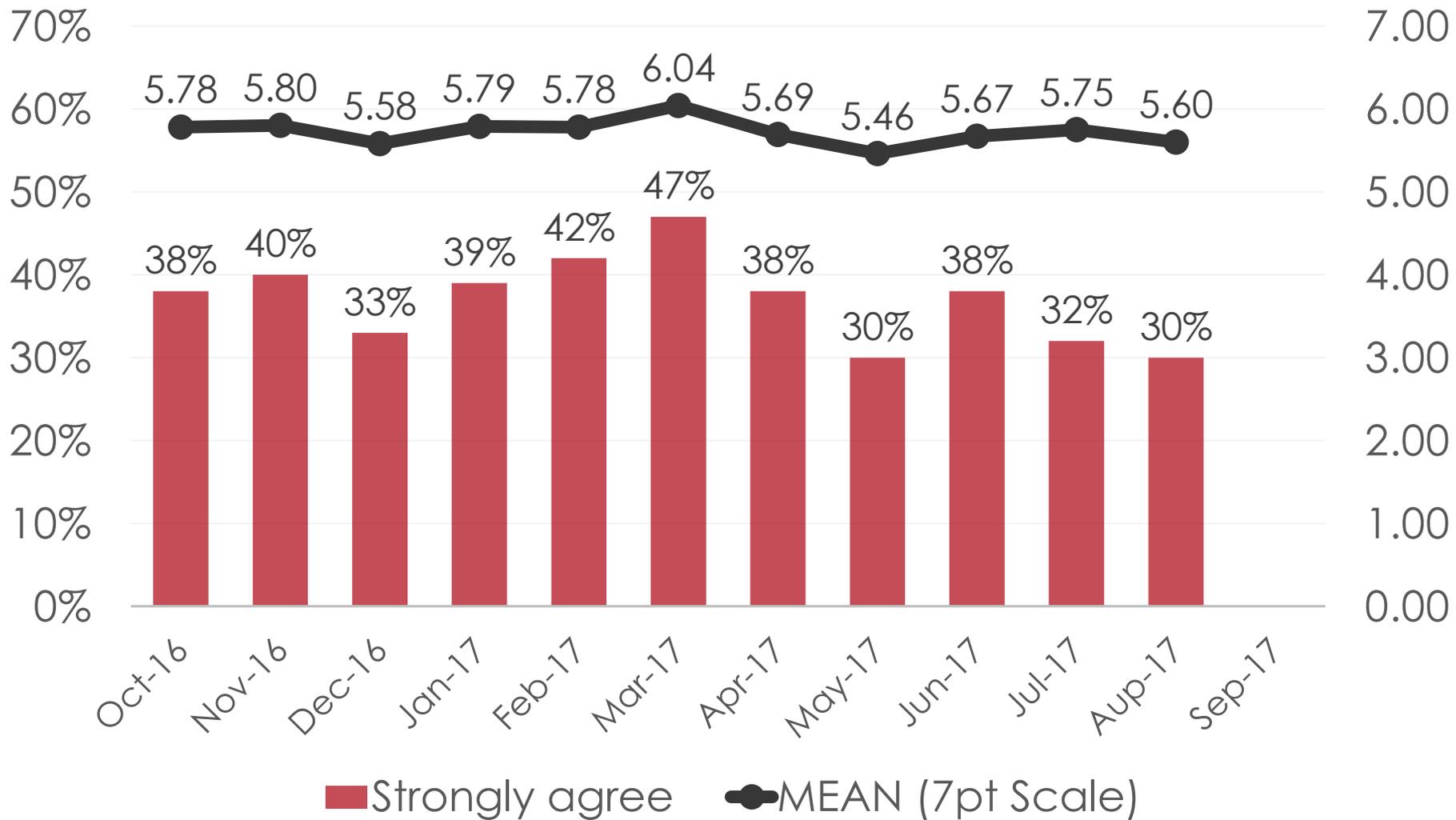
Negative aspects of trip (Top Reason)



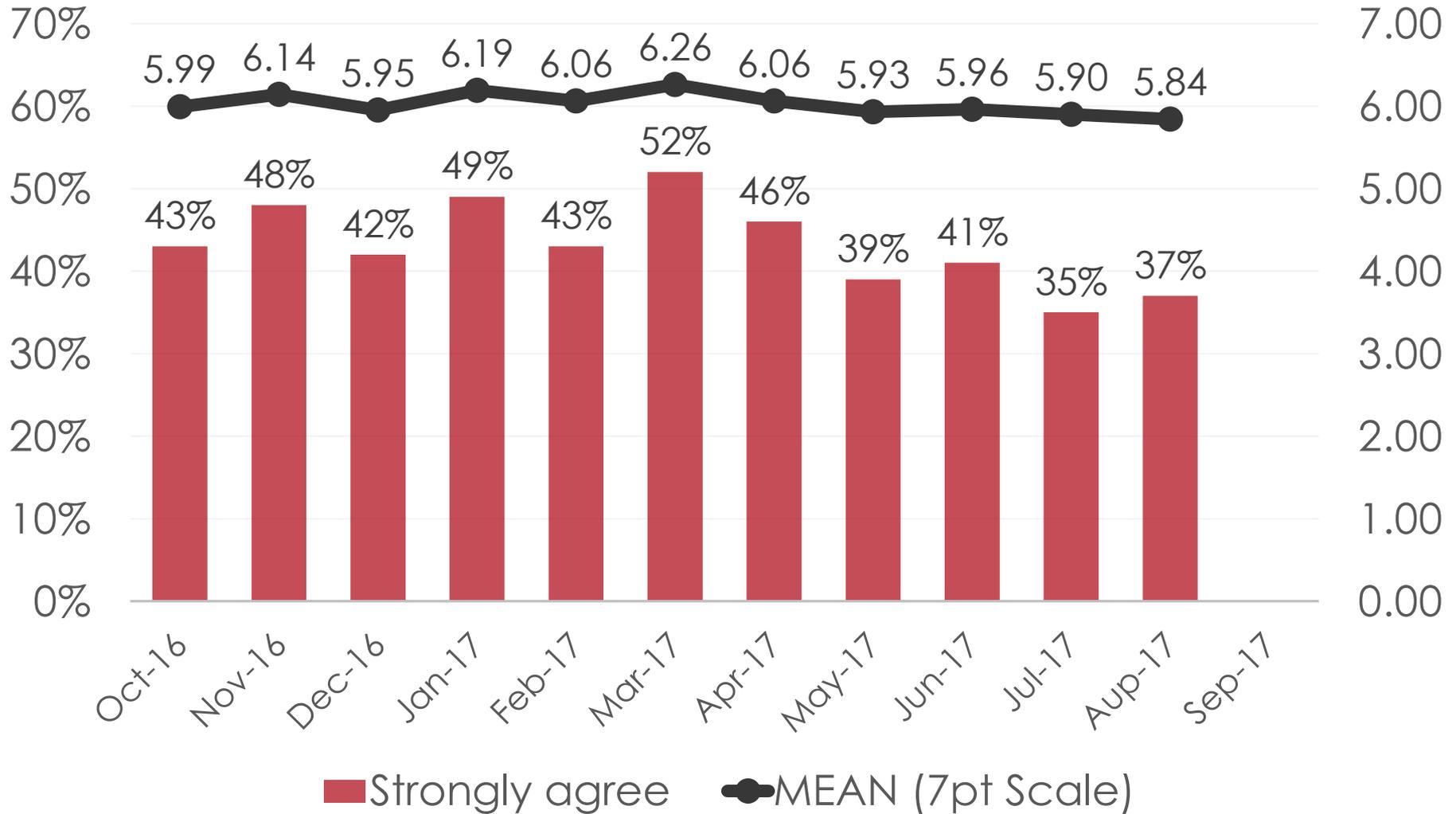
Guam was better than expected



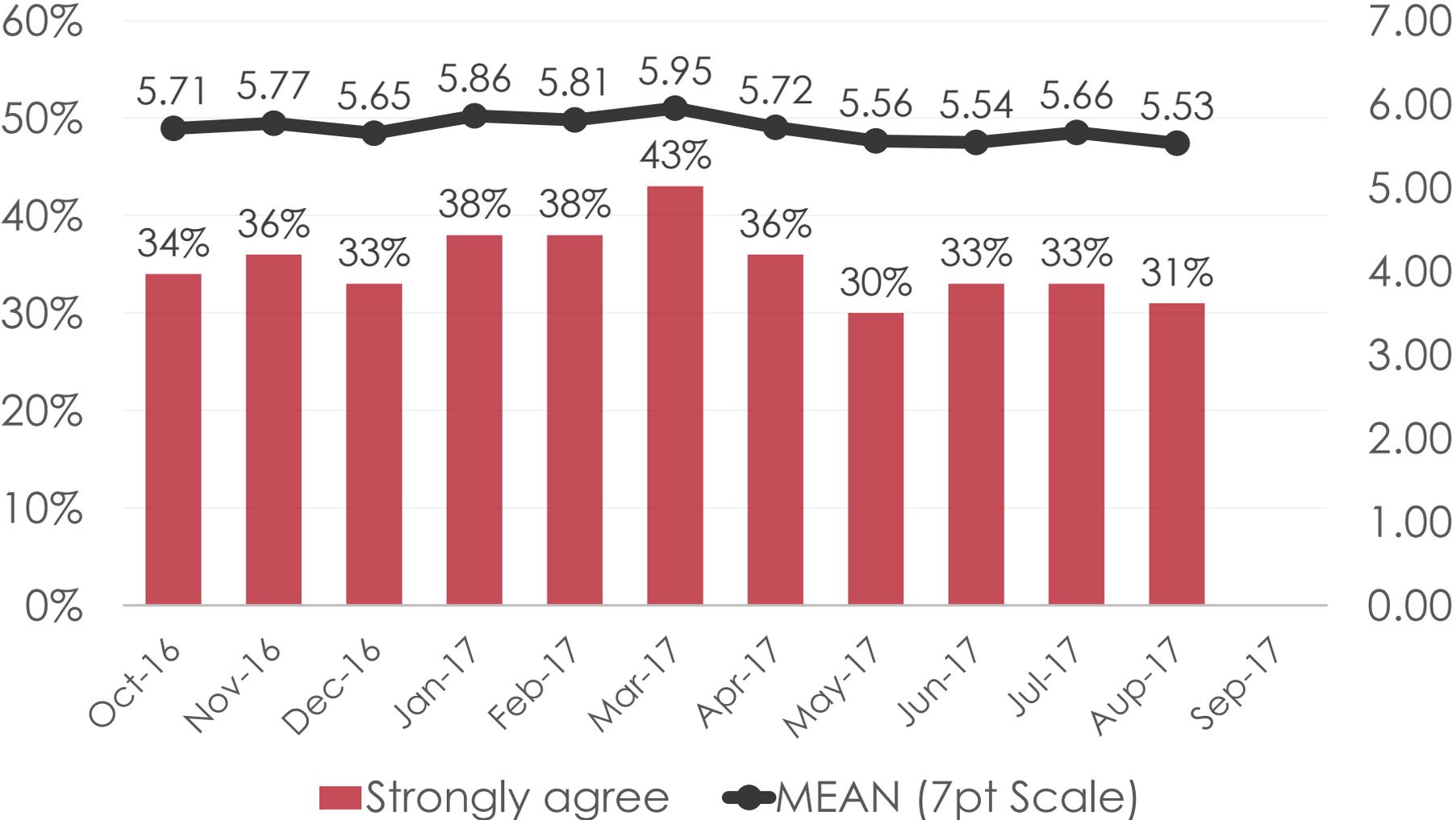
I had no communication problems



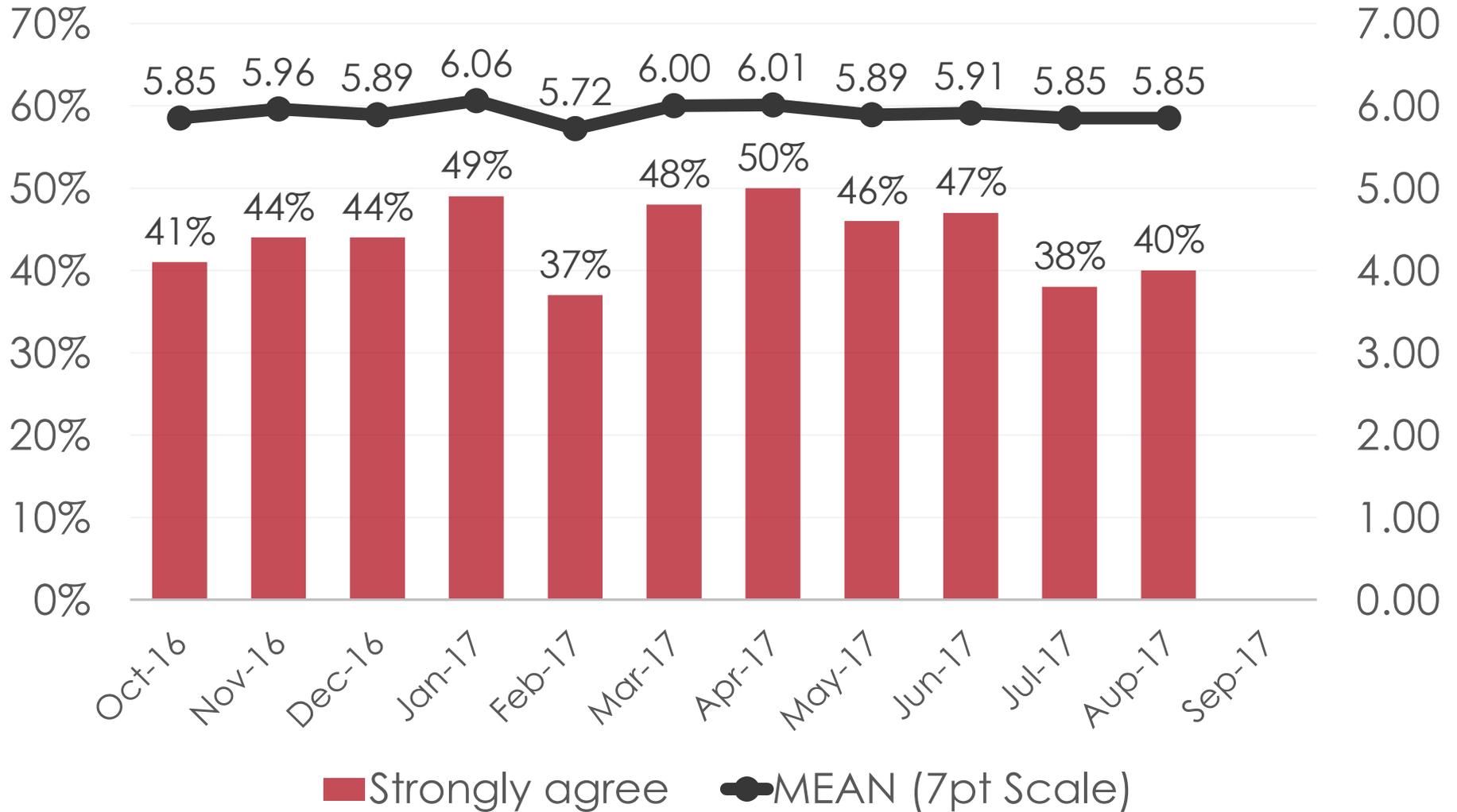
I will recommend Guam to friends



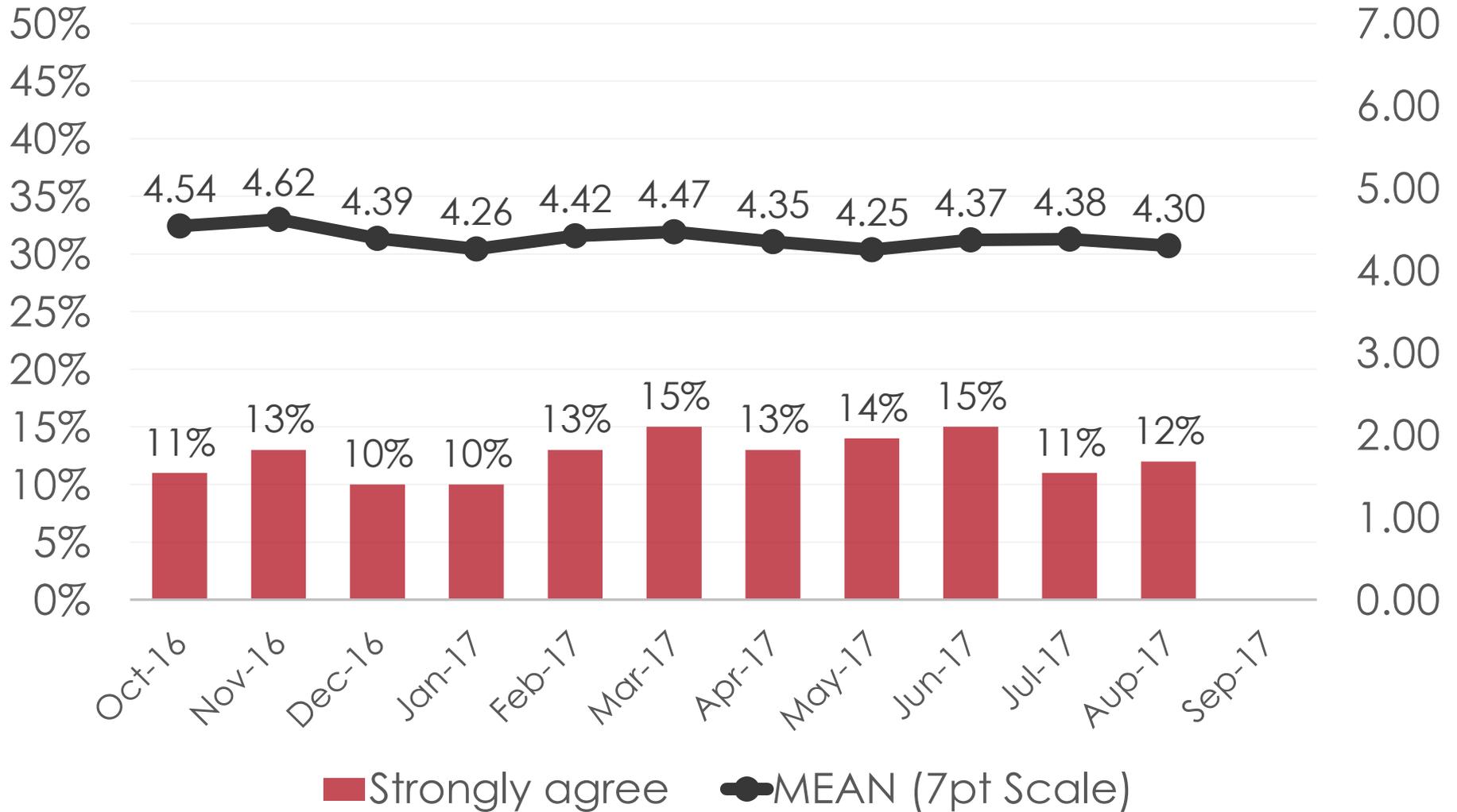
Sites on Guam were attractive



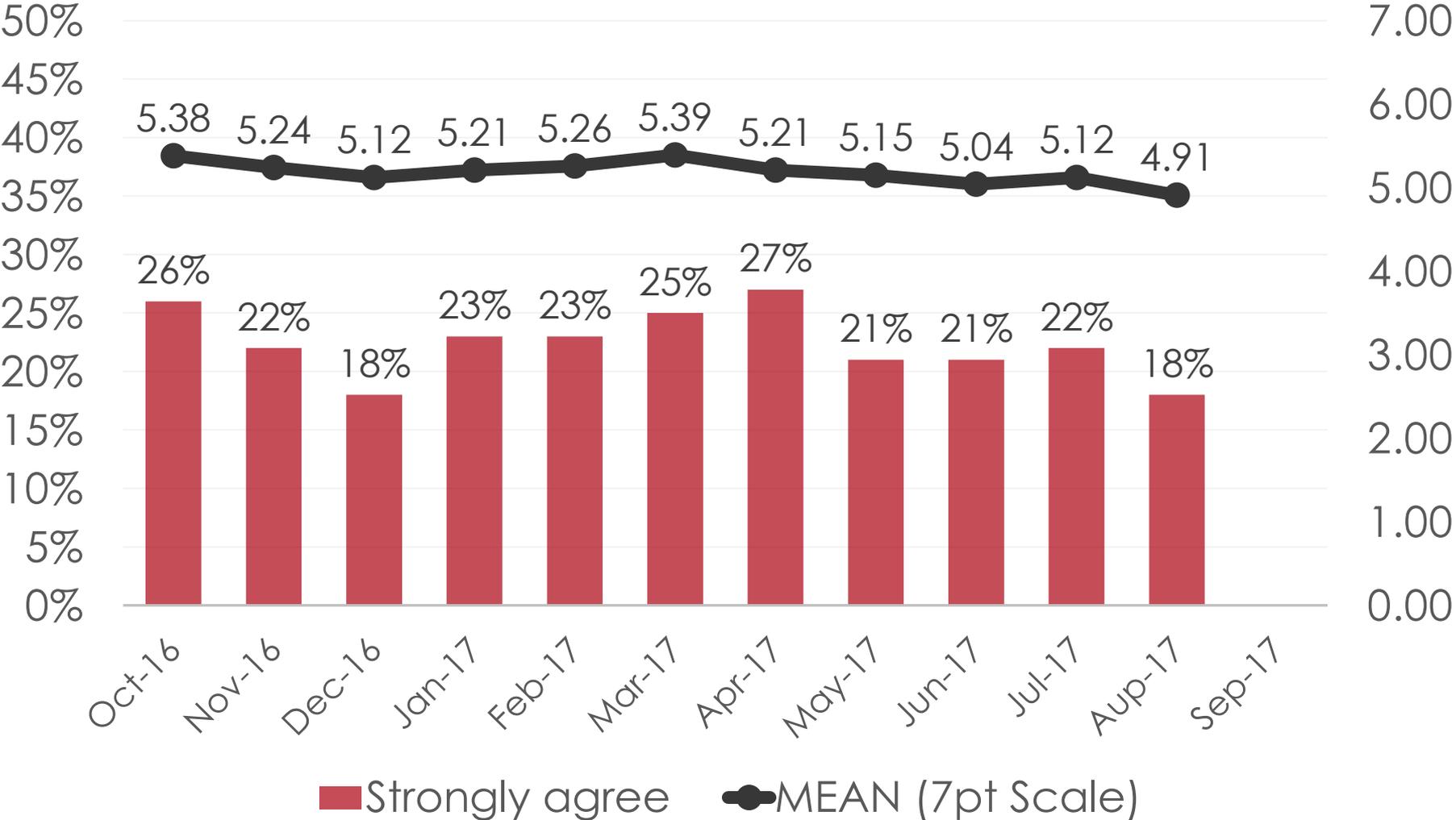
I plan to visit Guam again



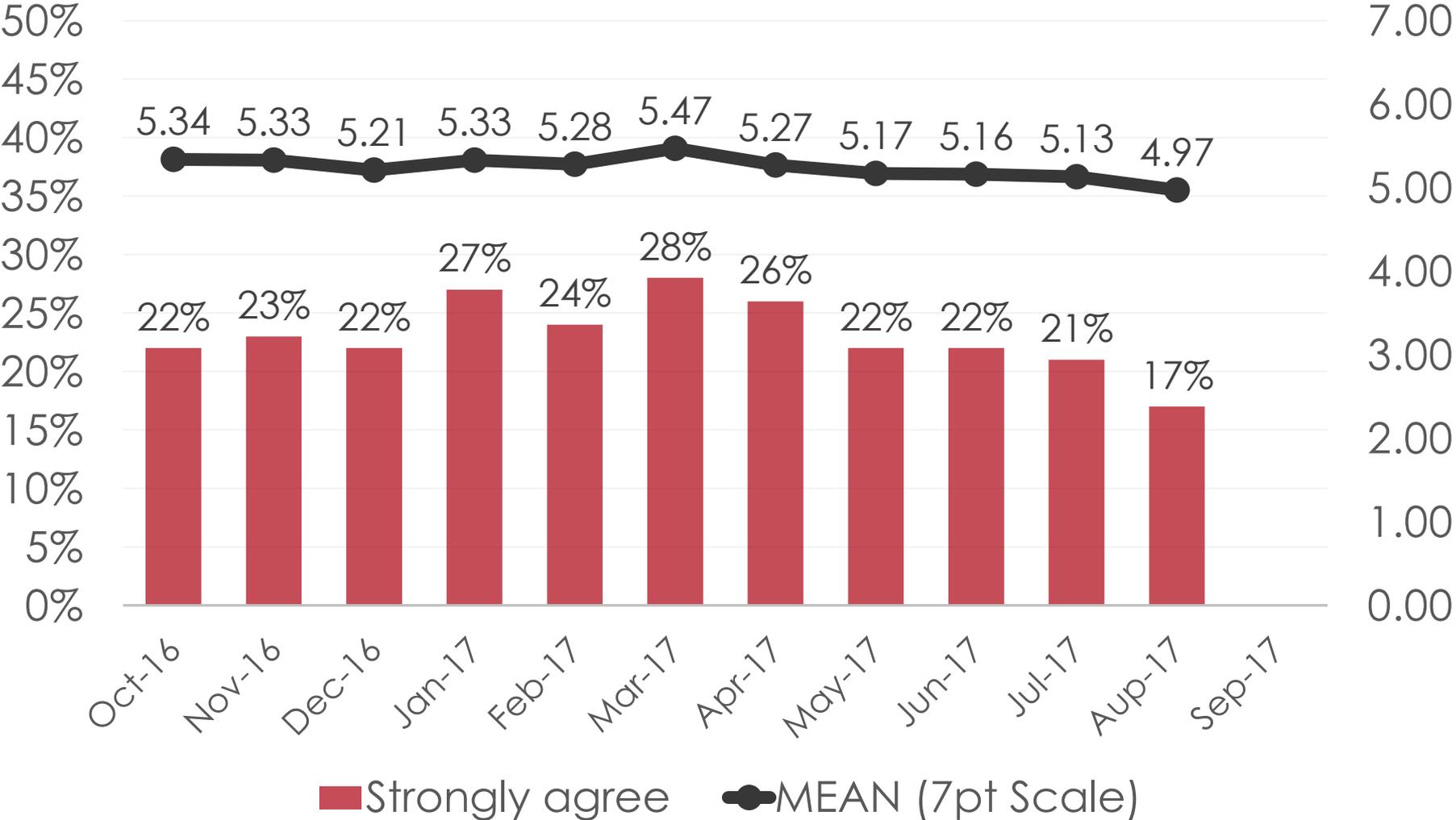
Not enough night time activities



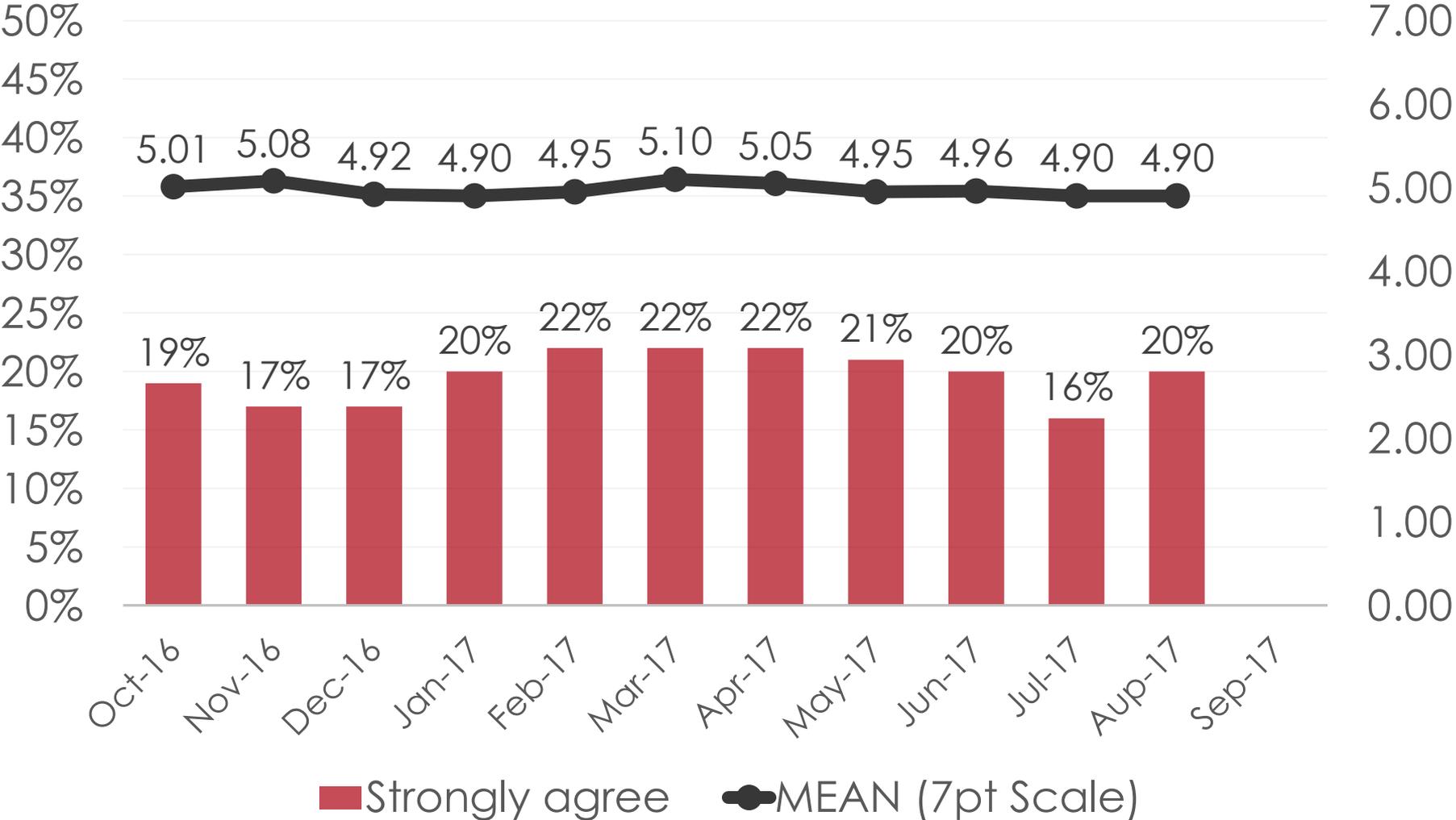
Tour guides were professional



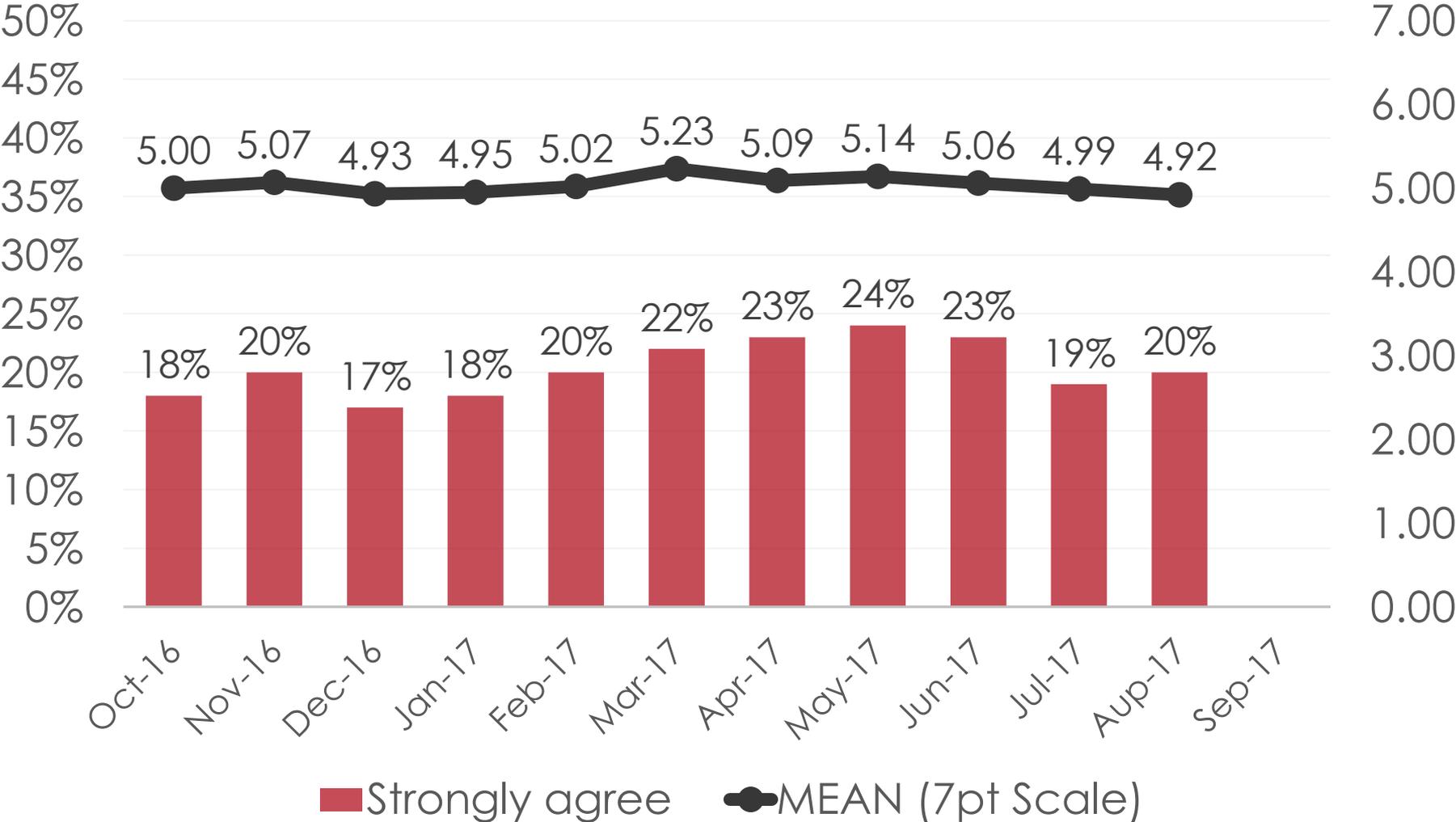
Tour drivers were professional



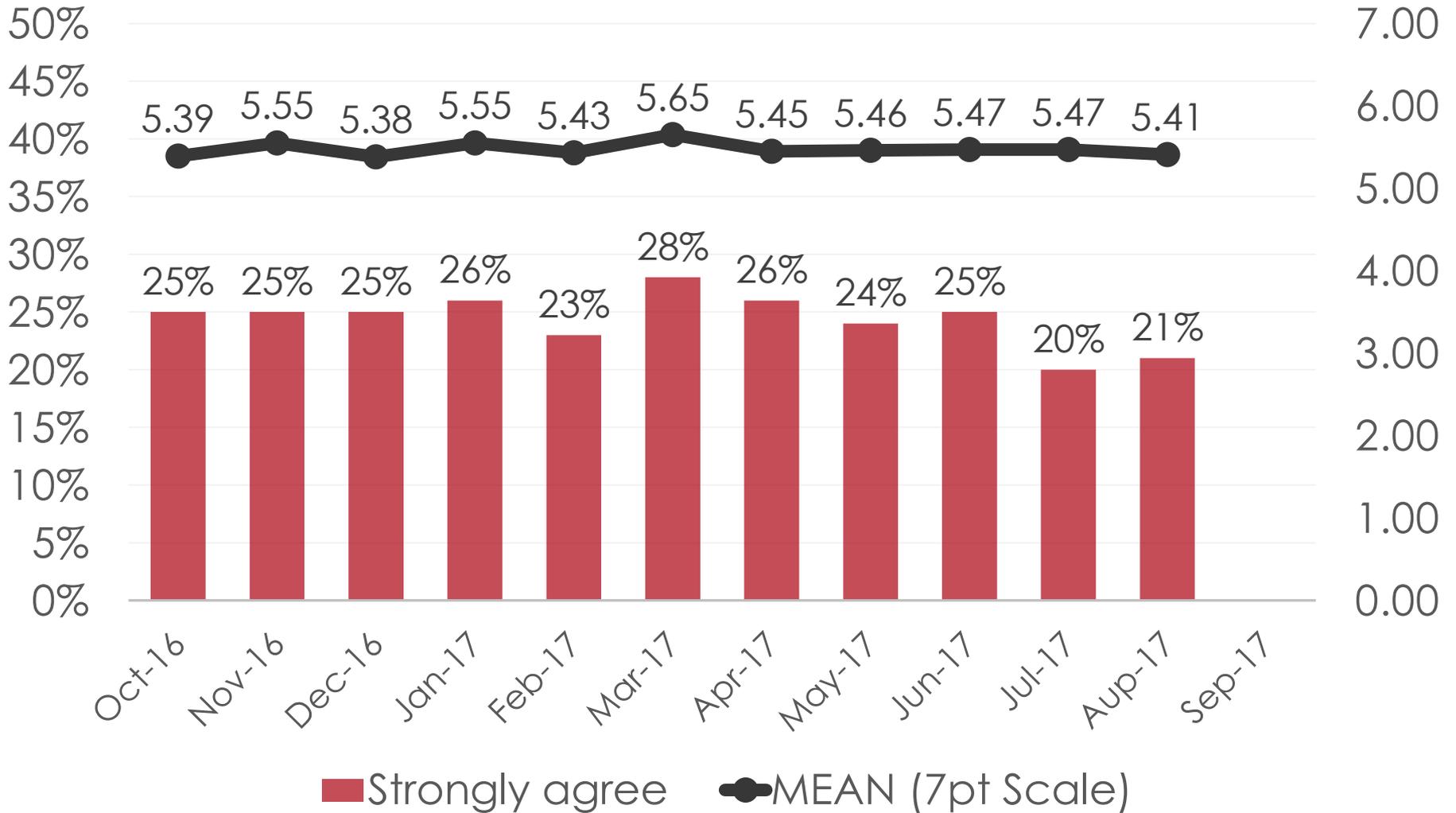
Taxi drivers were professional



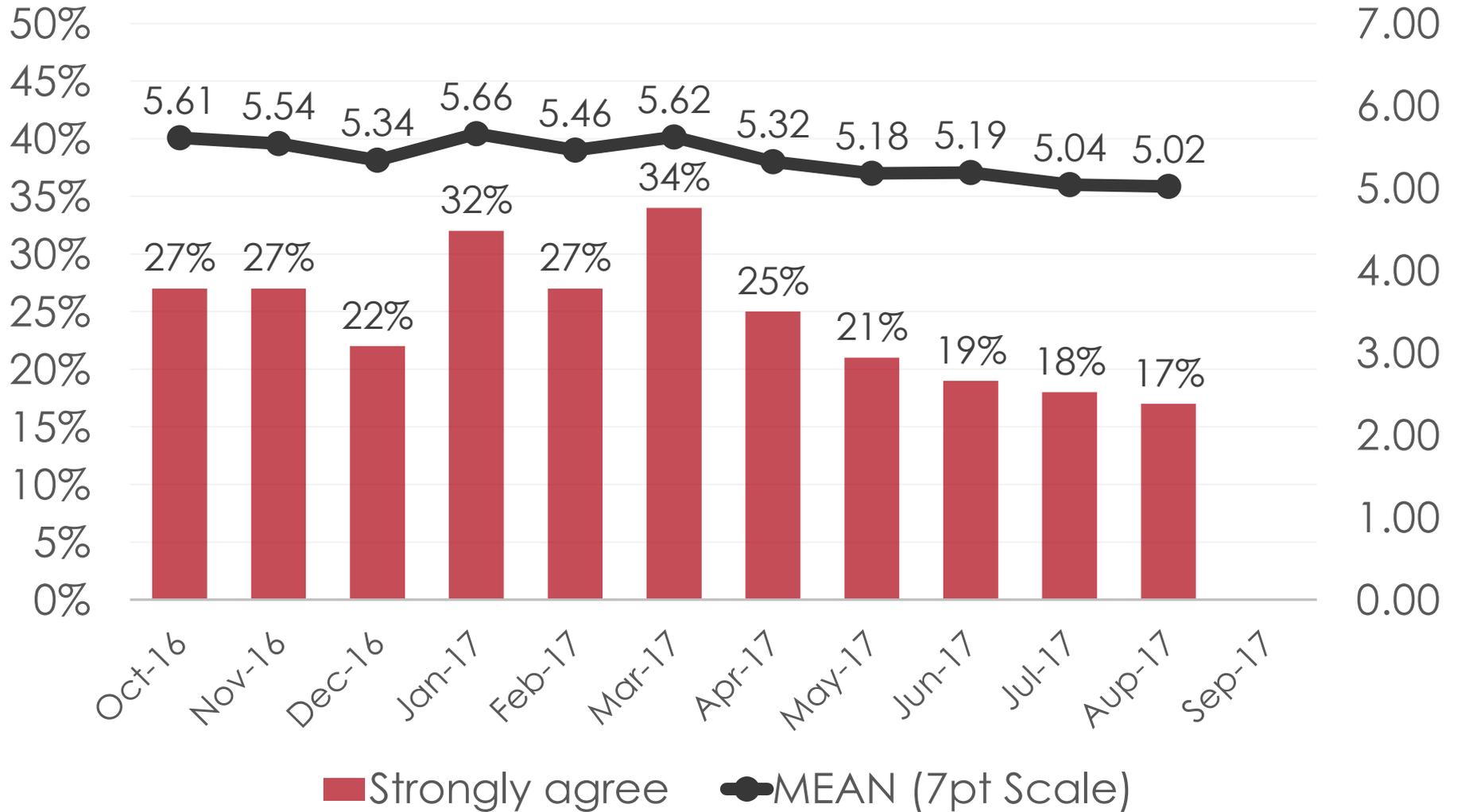
Taxis were clean



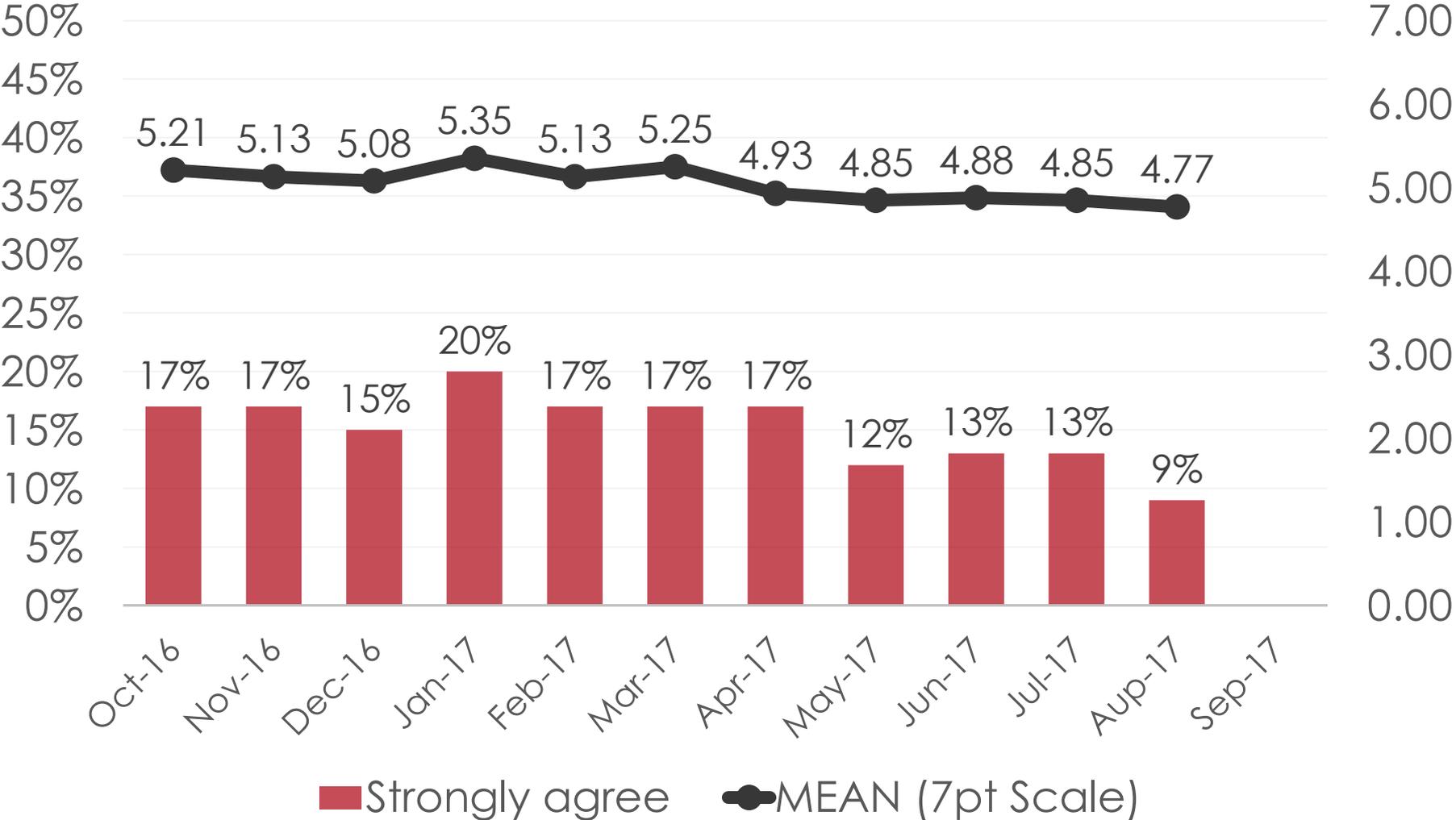
Guam airport was clean



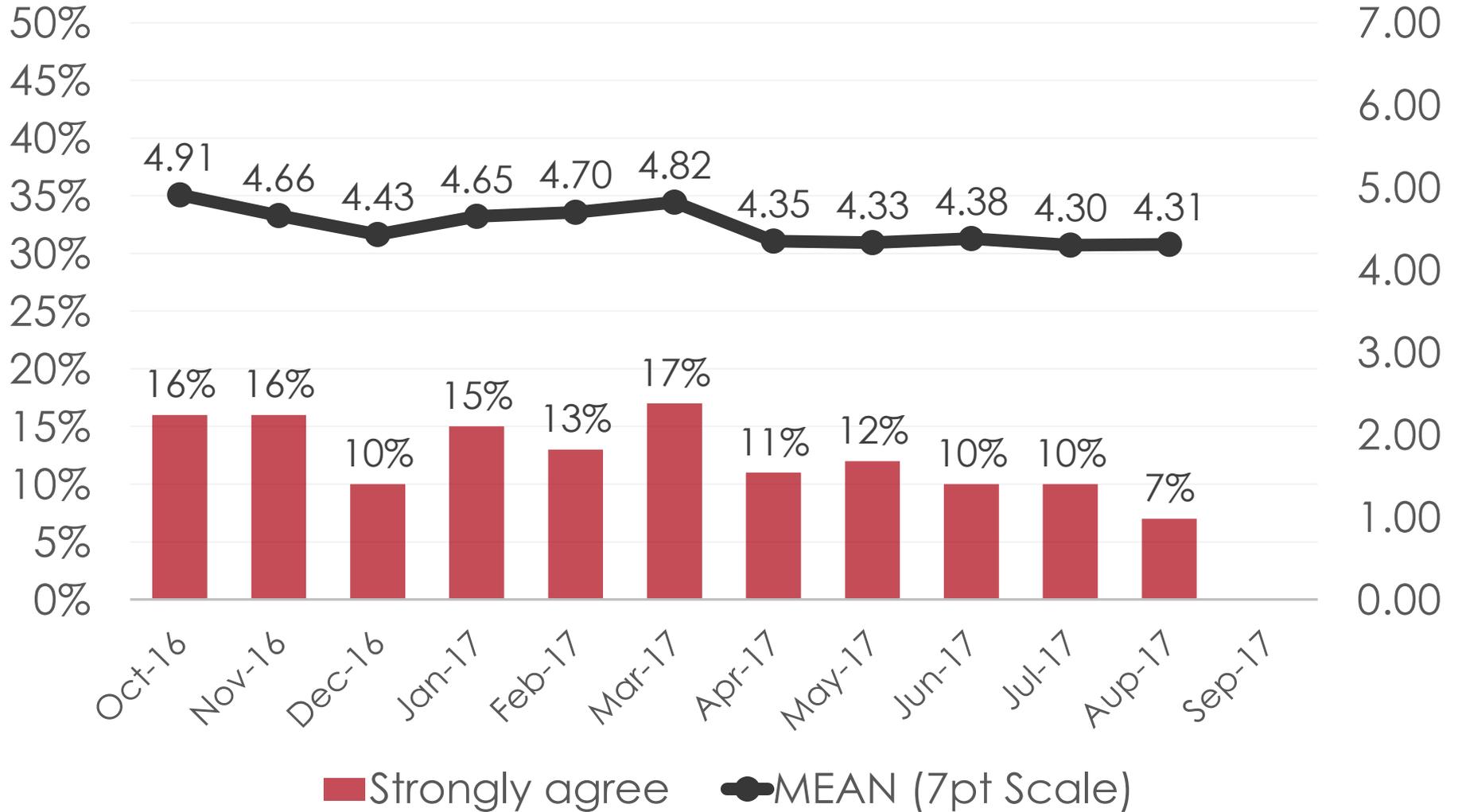
Ease of getting around



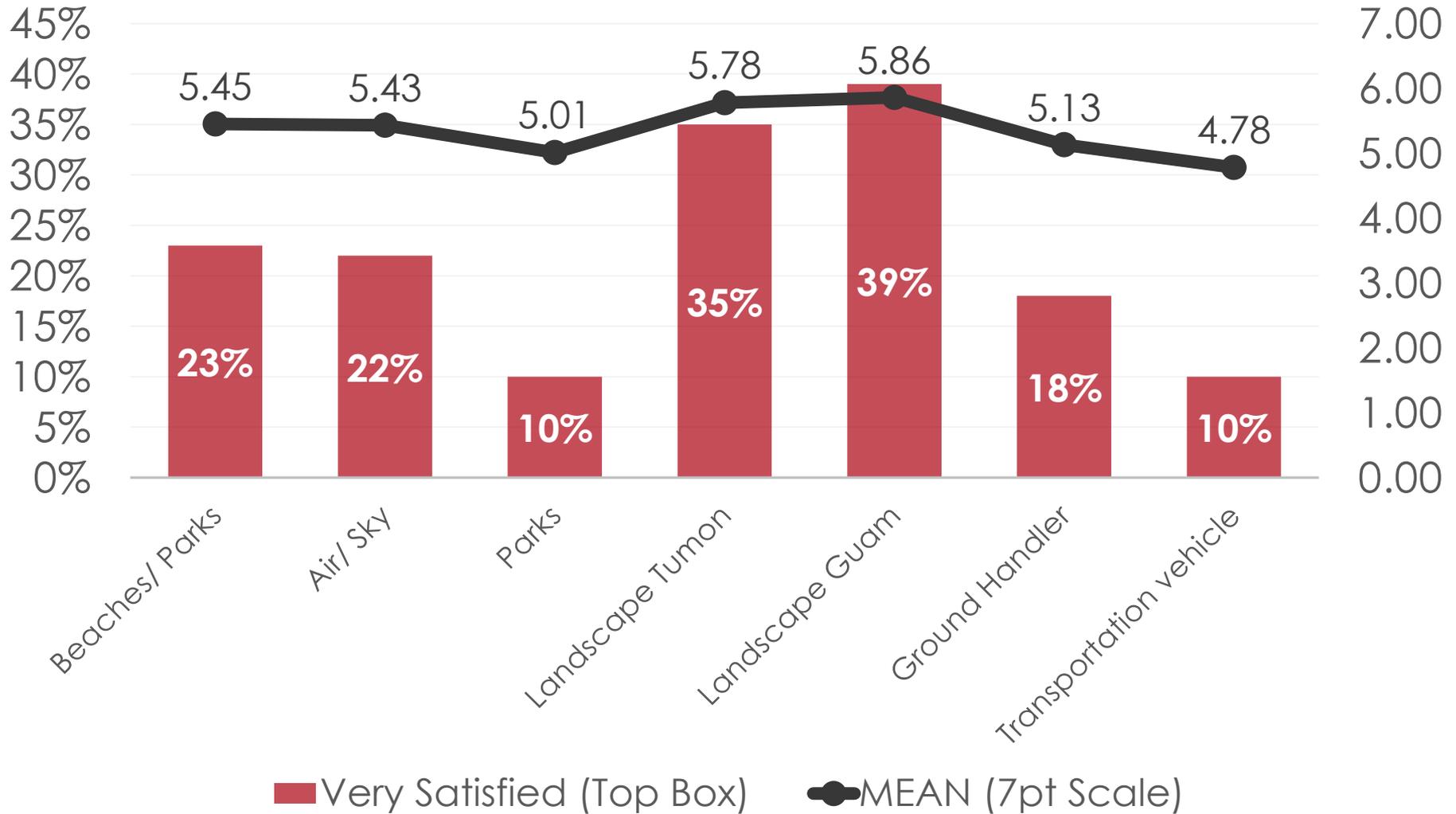
Safety walking around at night



Price of things on Guam

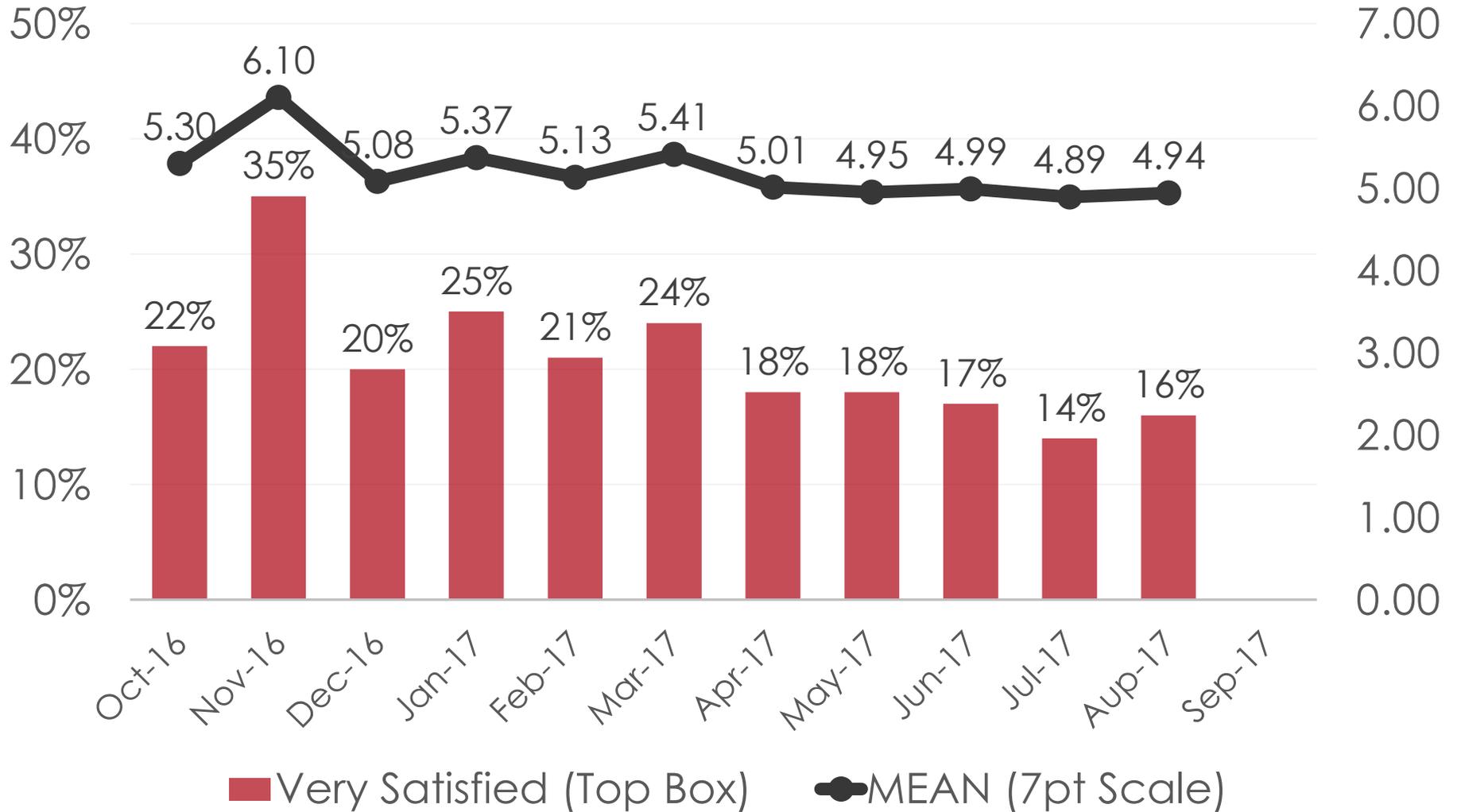


GENERAL SATISFACTION – Quality/ Cleanliness

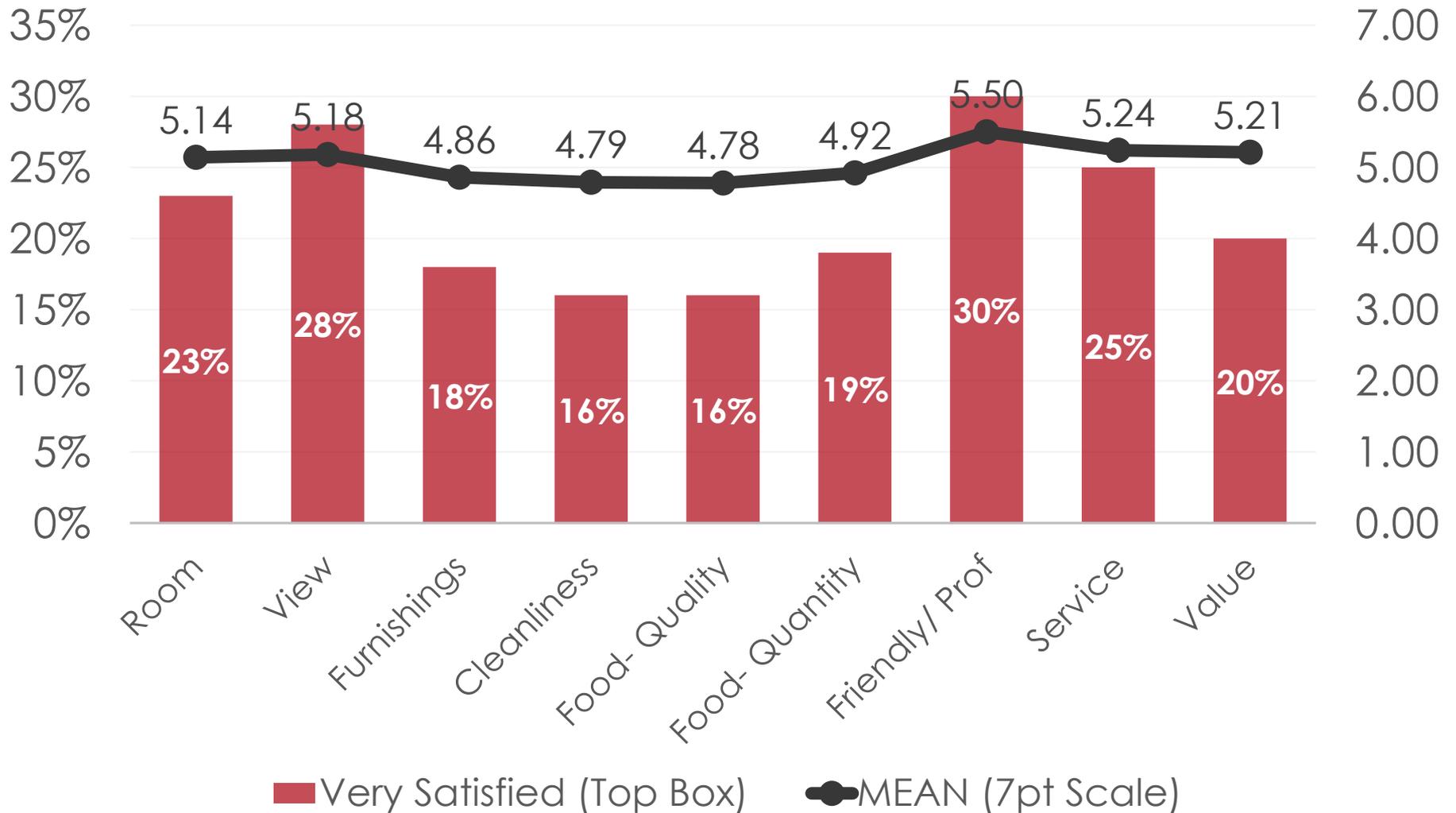


ACCOMMODATIONS

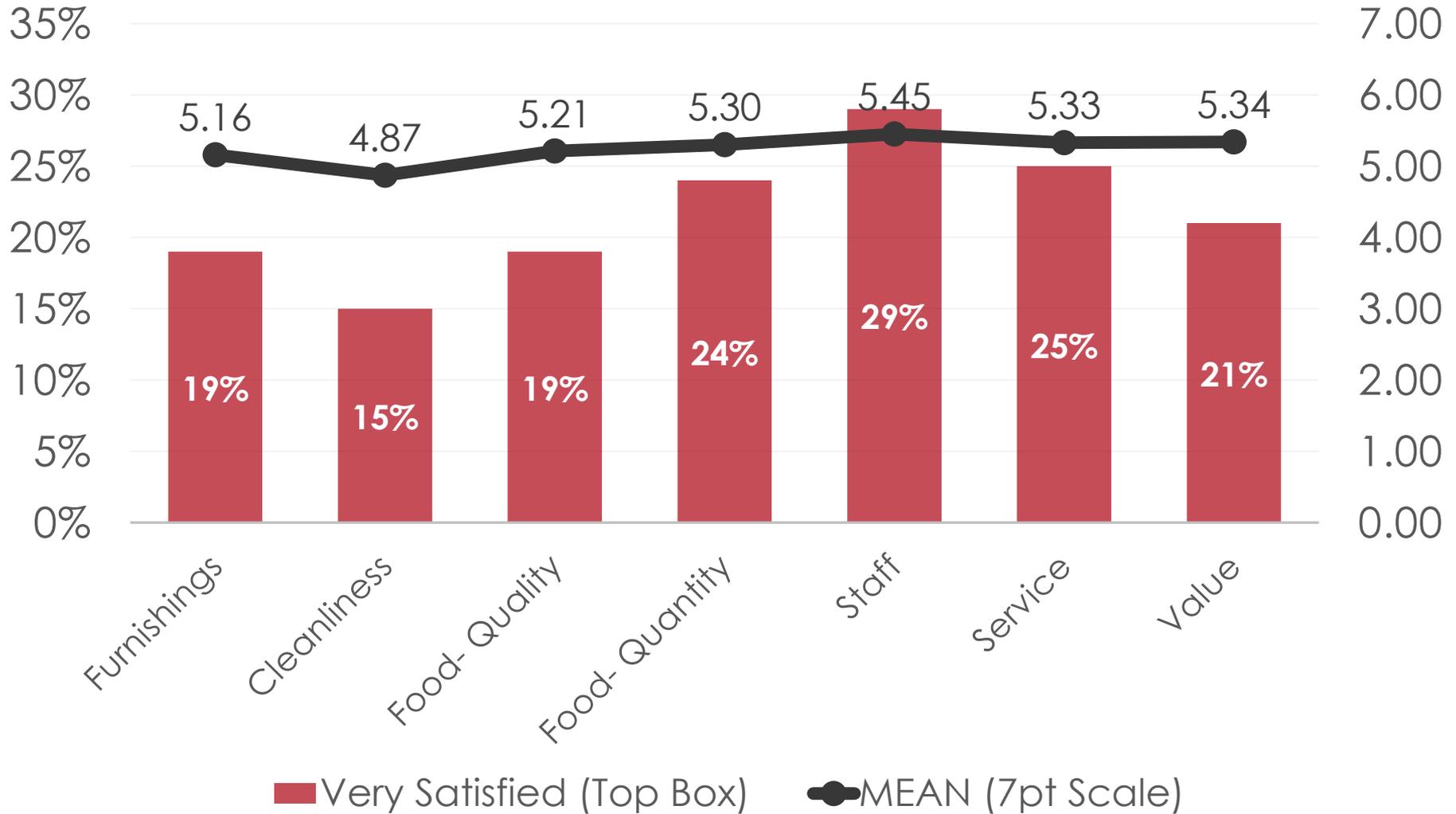
OVERALL SATISFACTION



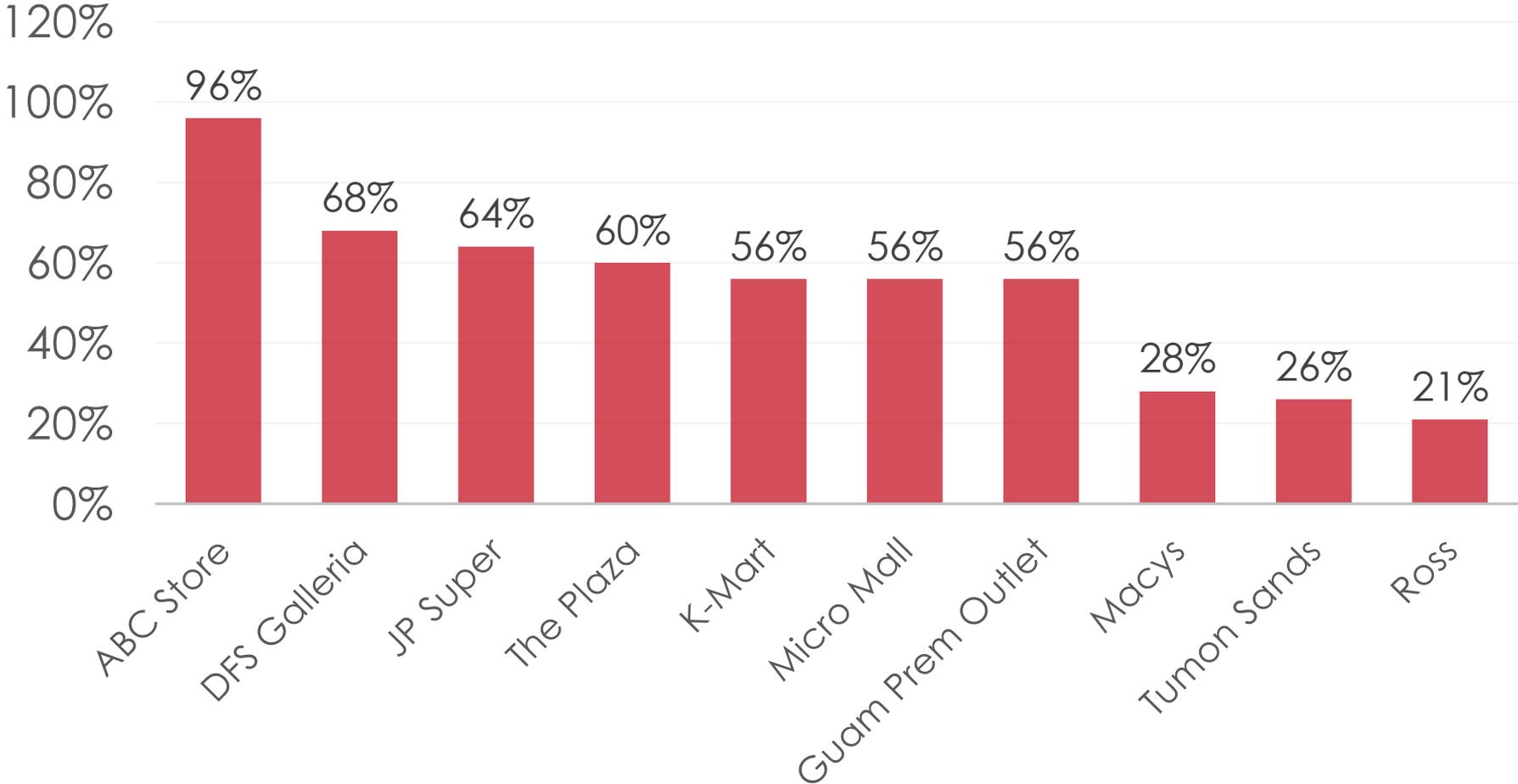
ACCOMMODATIONS – Satisfaction by Category



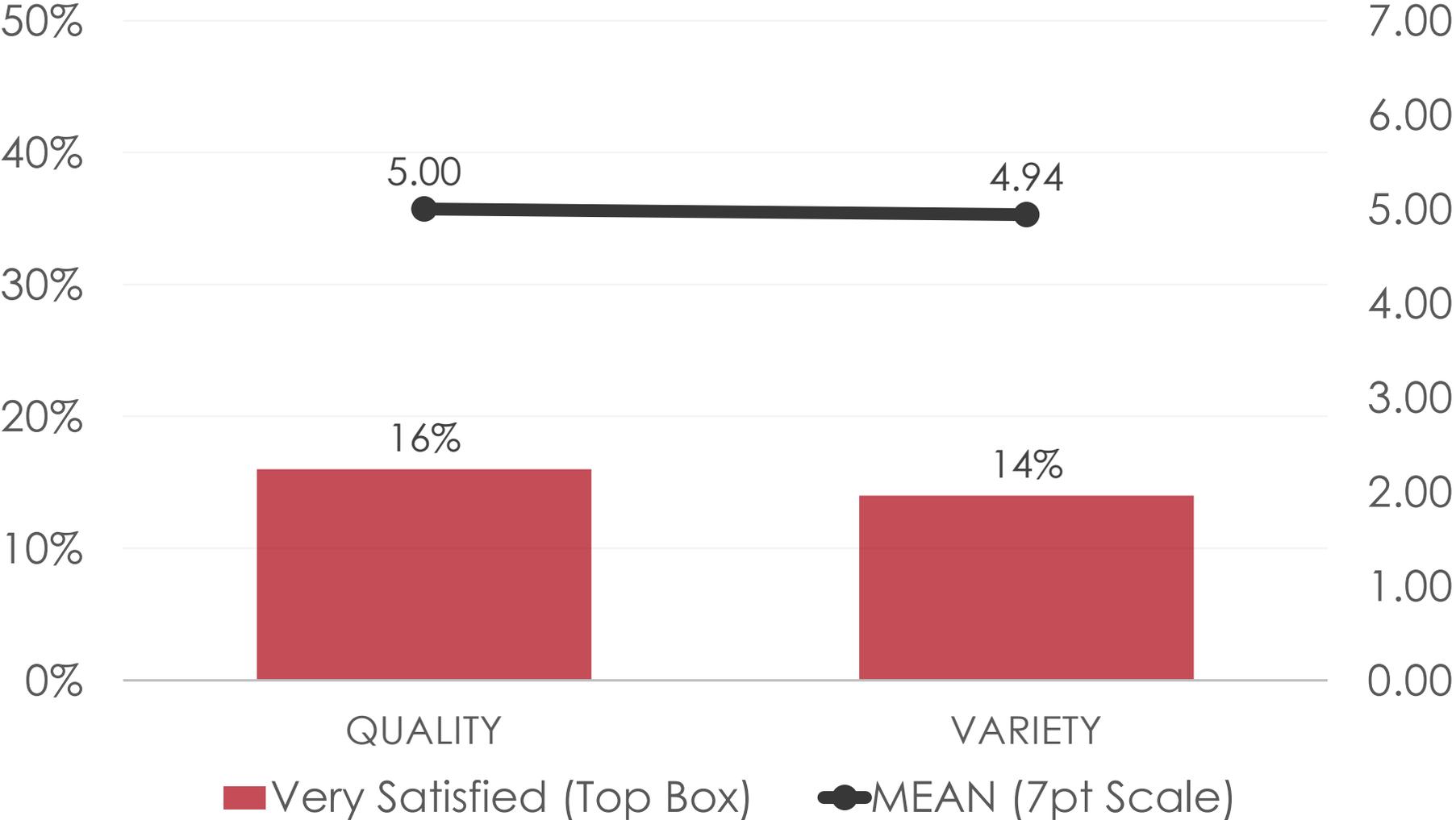
DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



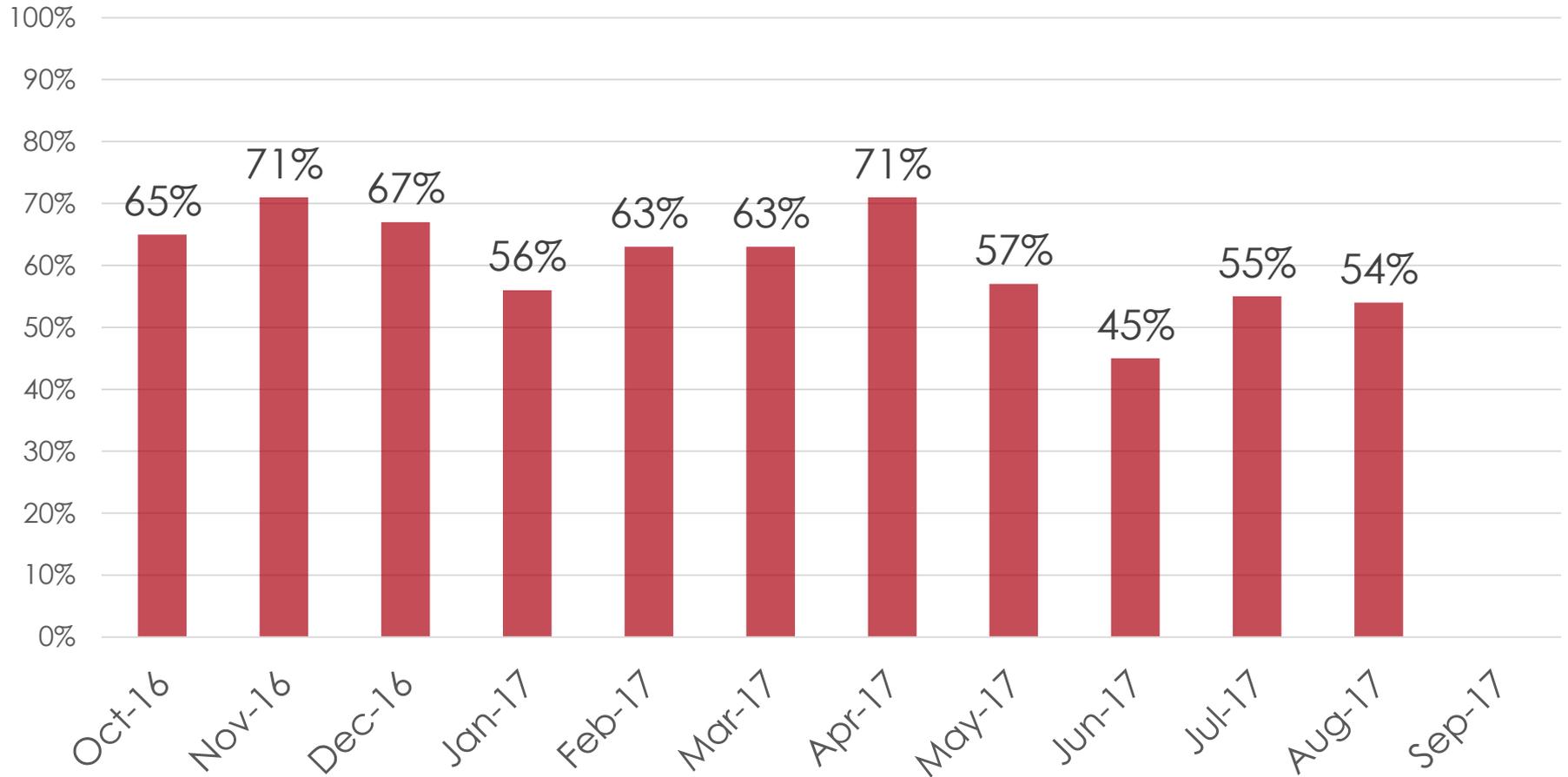
Shopping Malls/ Stores (Top Responses)



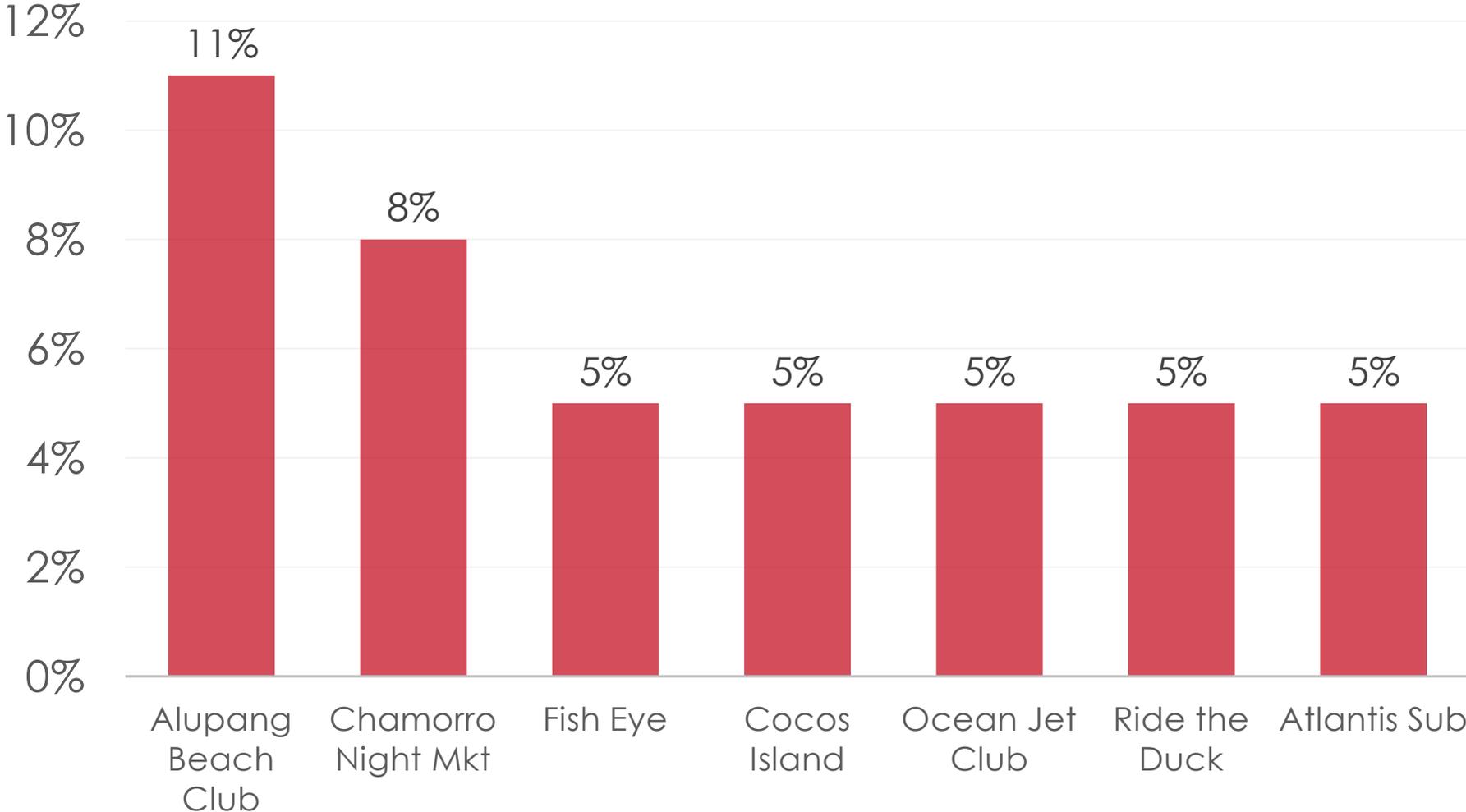
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – FY2017 Tracking

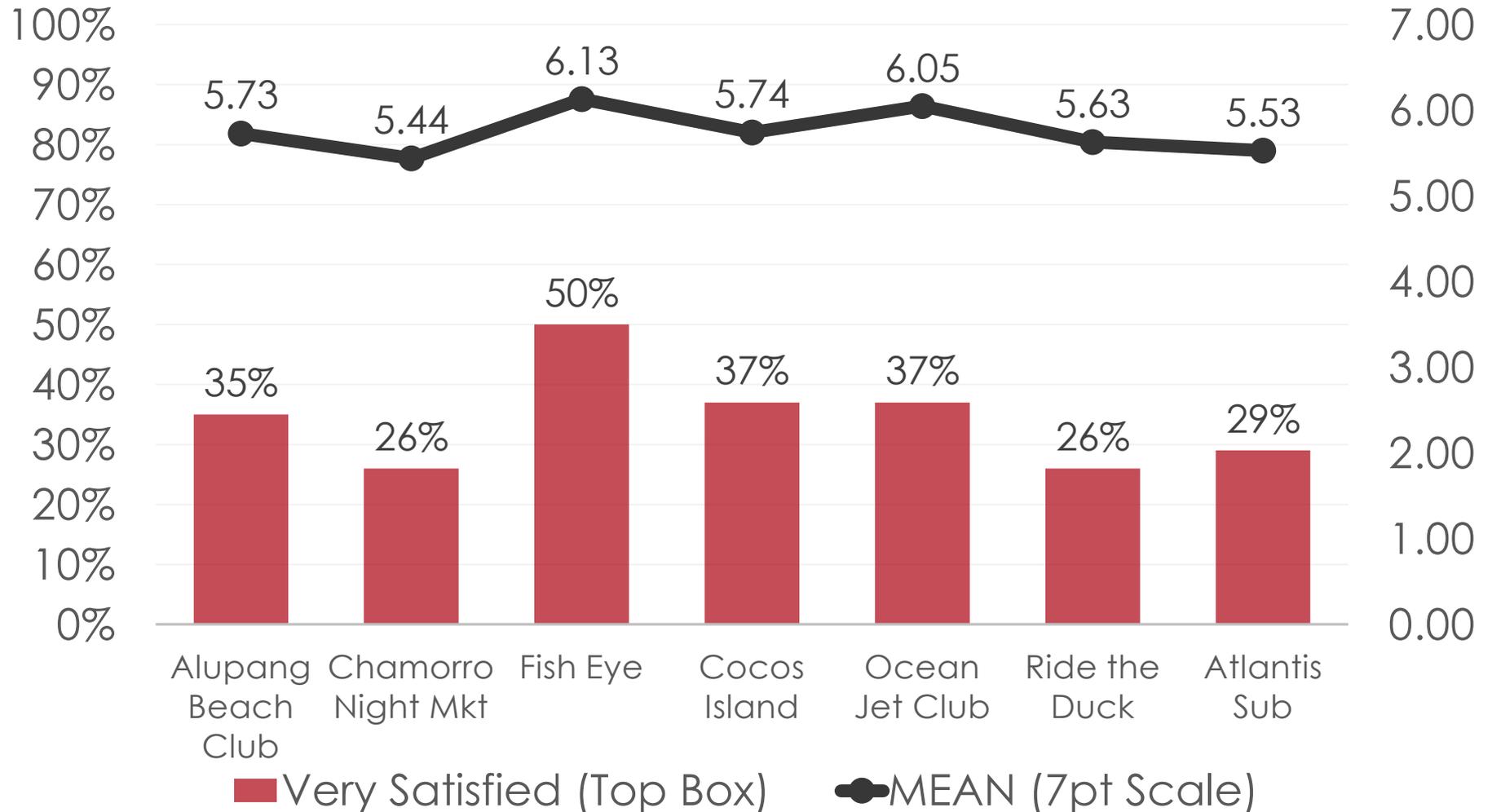


Optional Tour Participation (Top Responses)

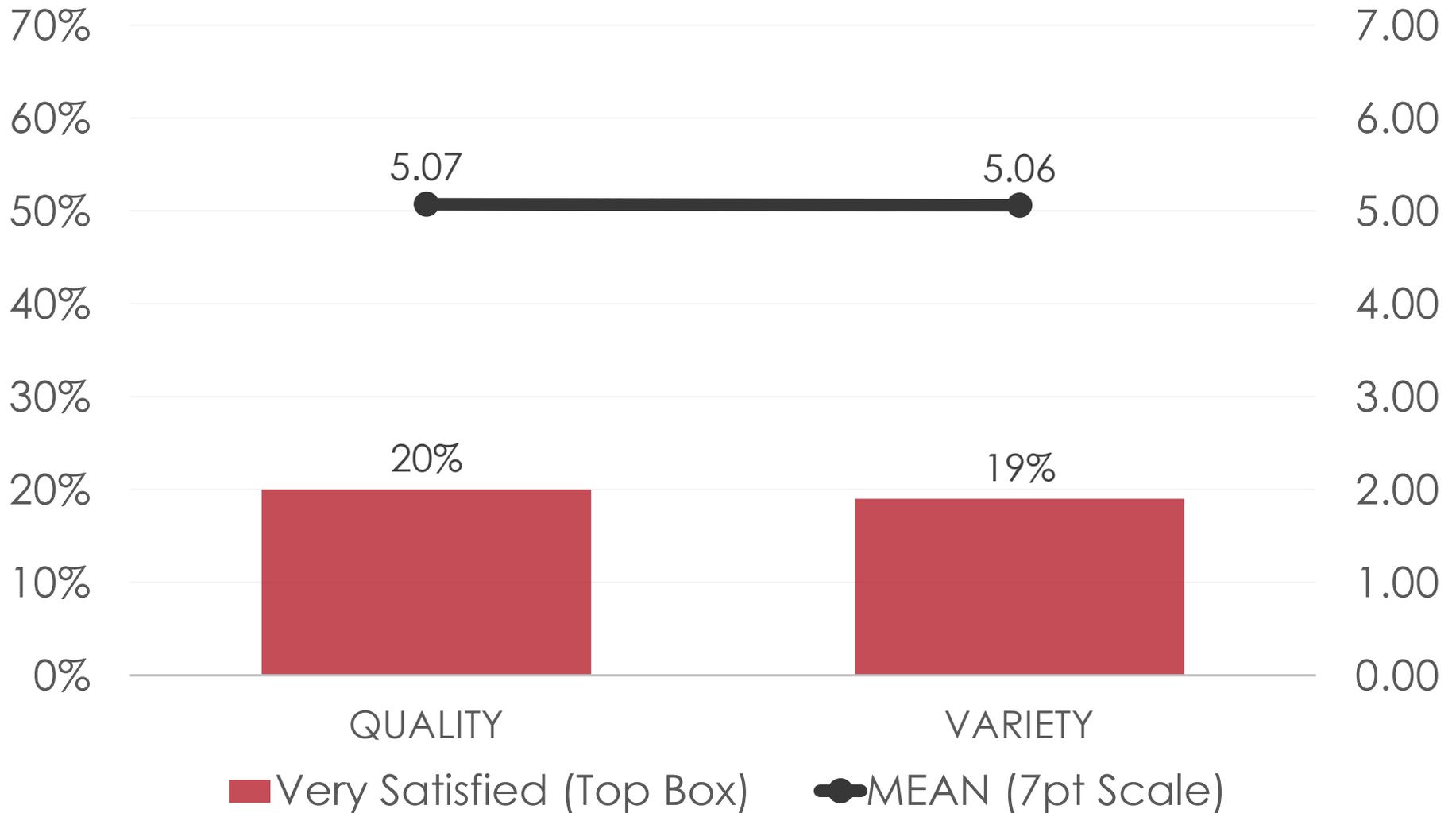


Optional Tour Satisfaction

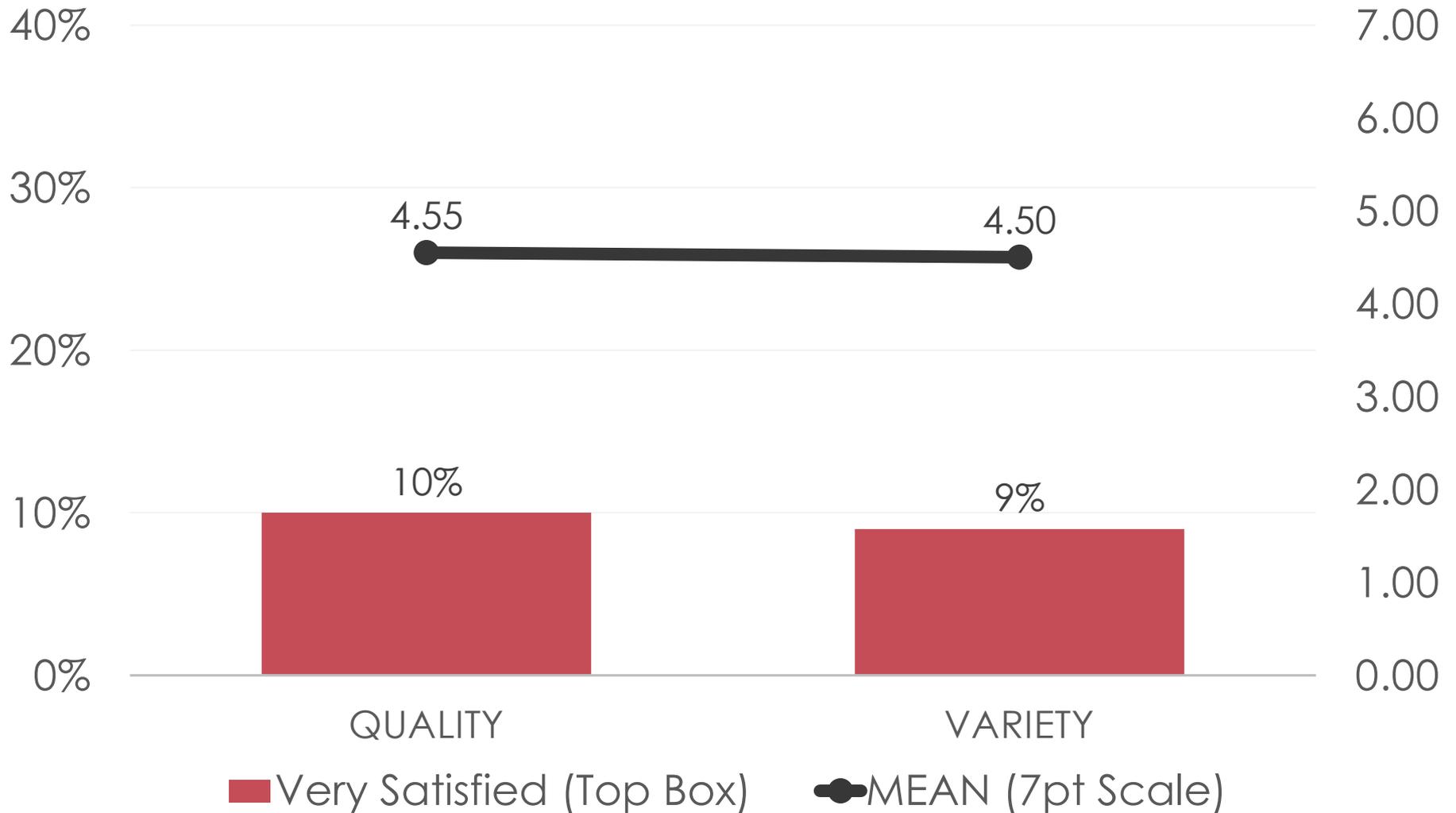
Top Responses only - Participation (5%+)



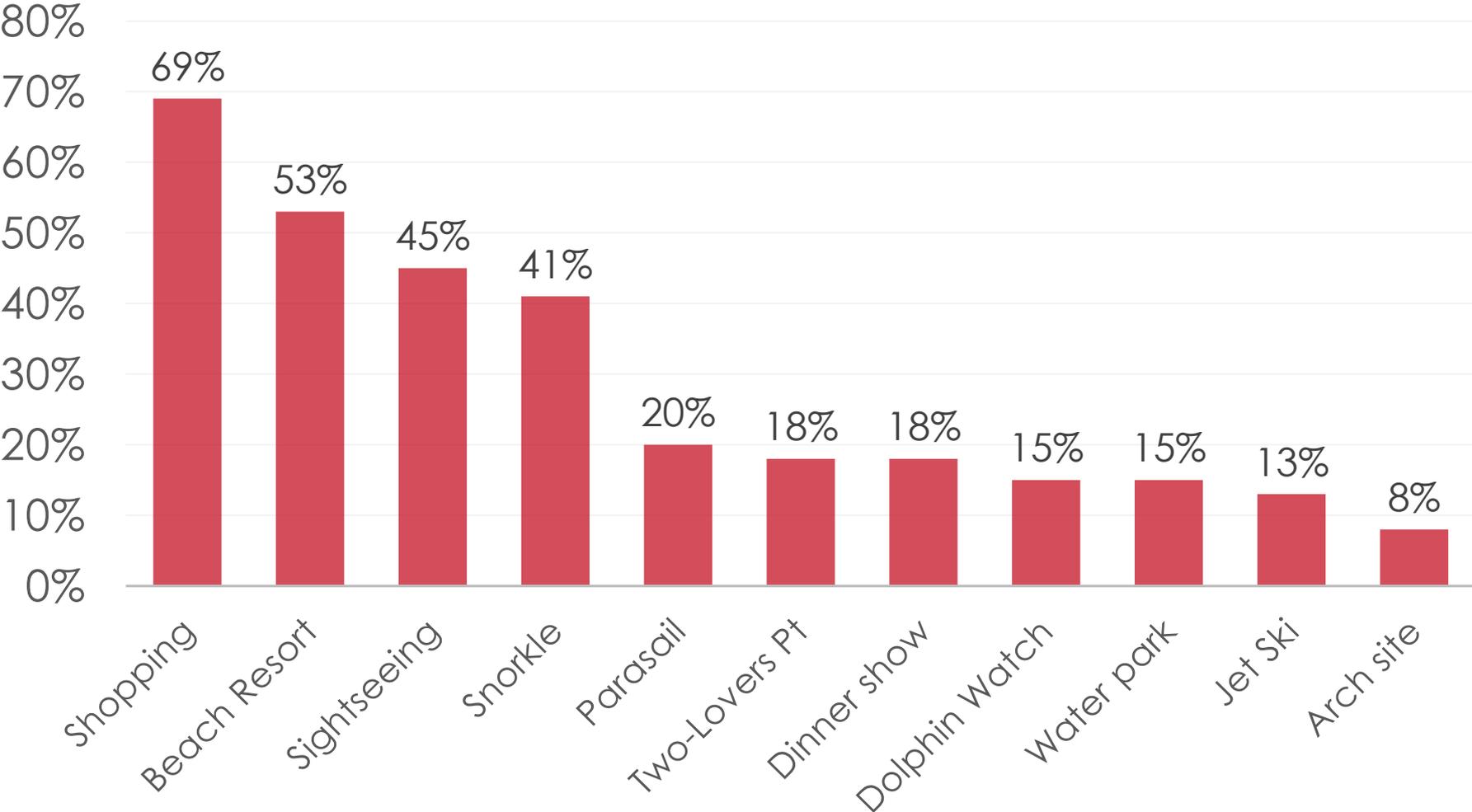
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

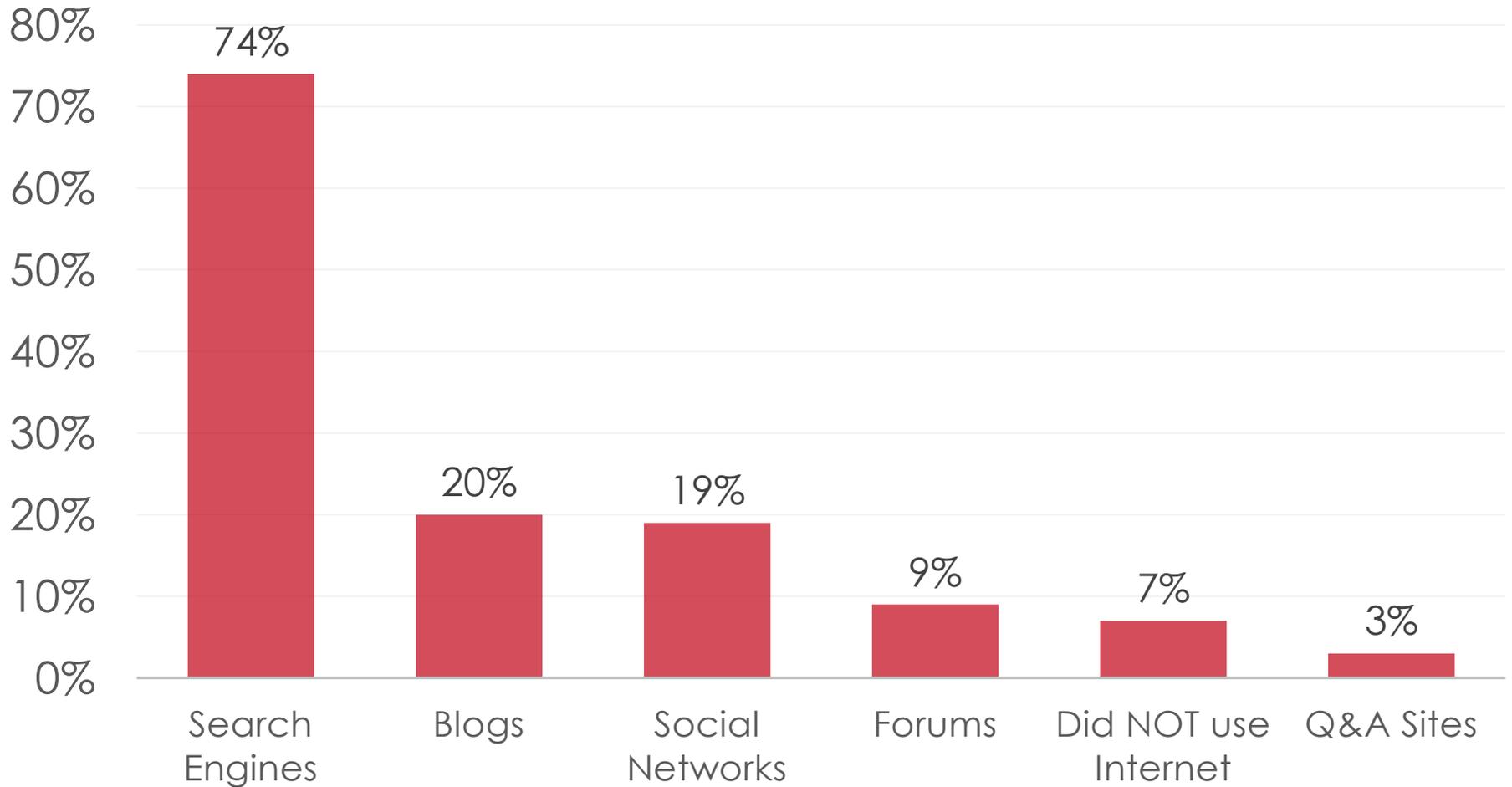


Activities Participation (Top Responses)



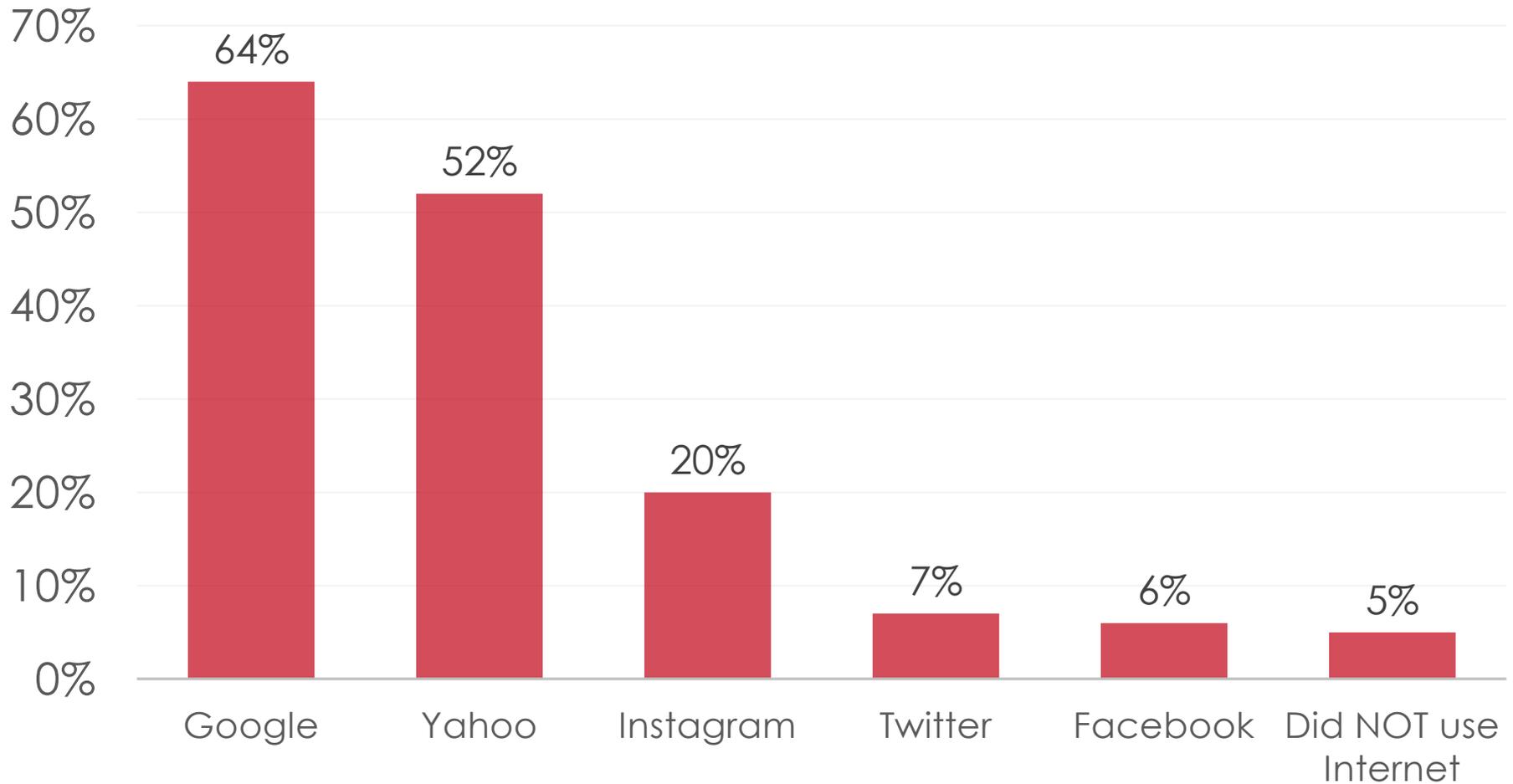
SECTION 5 PROMOTIONS

INTERNET- GUAM SOURCES OF INFORMATION



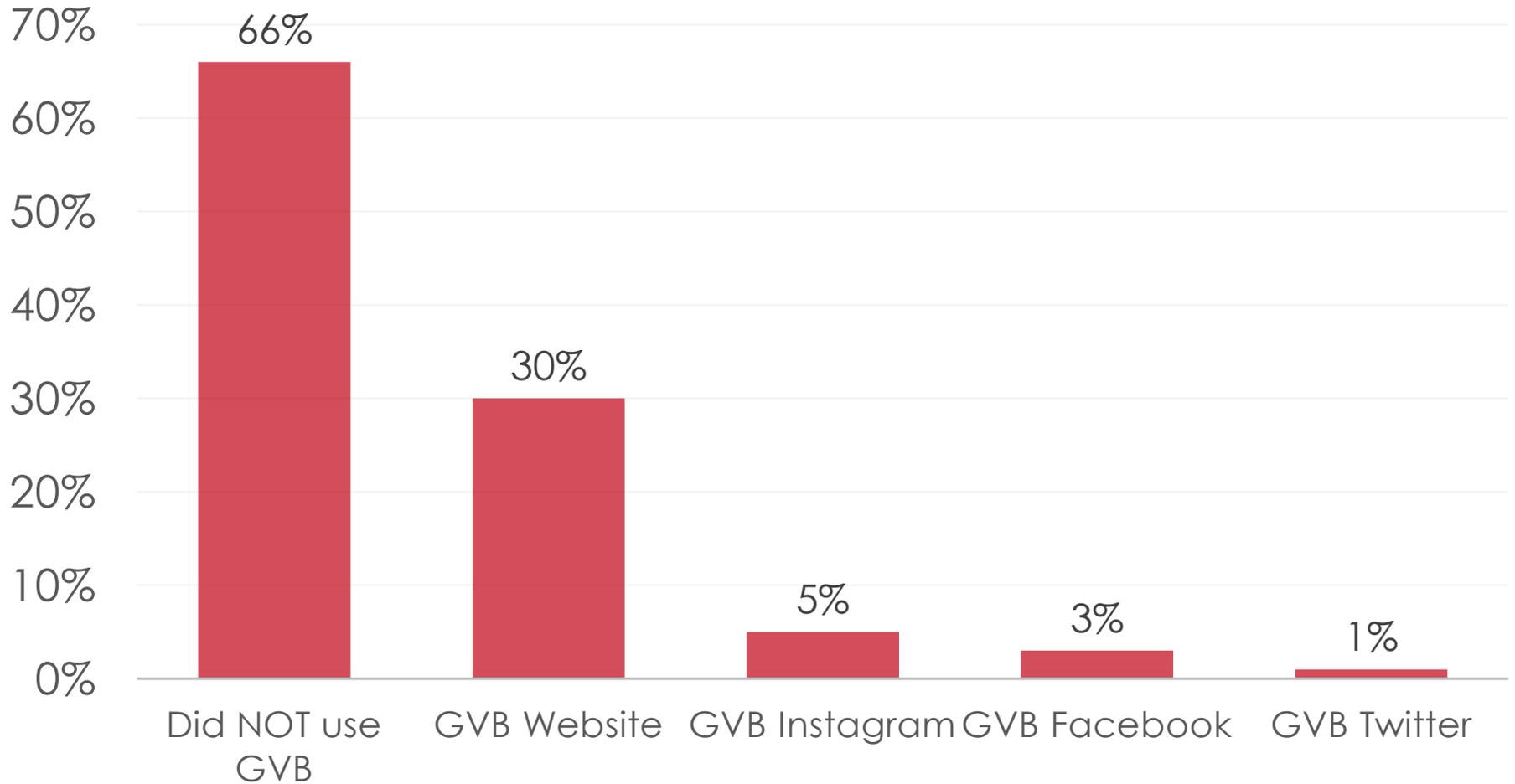
INTERNET- SOURCES OF INFORMATION

Things to do on Guam

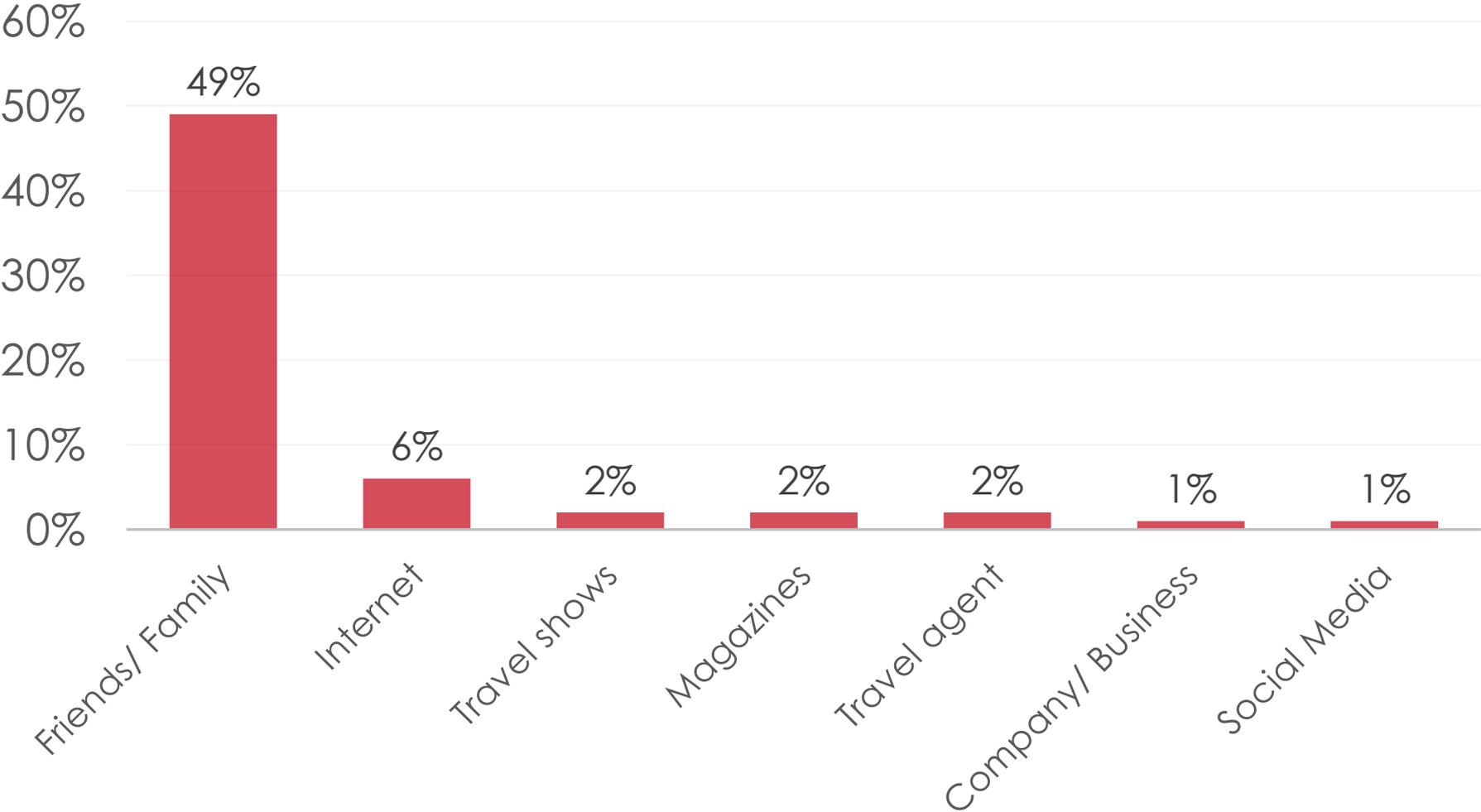


INTERNET- SOURCES OF INFORMATION

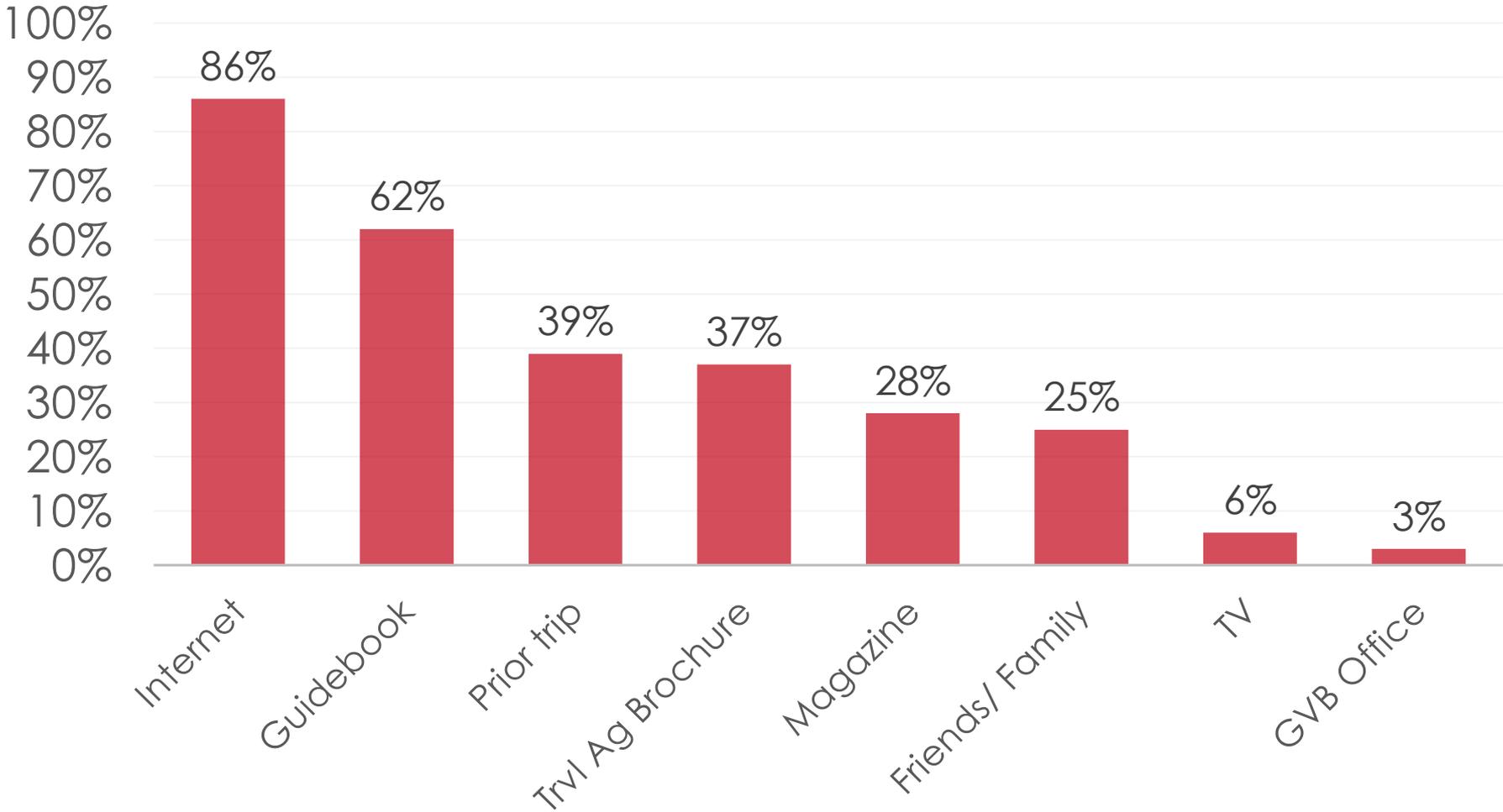
GVB



TRAVEL MOTIVATION



PRE-ARRIVAL SOURCES OF INFORMATION



PRE-ARRIVAL SOURCES OF INFORMATION – Key Segments

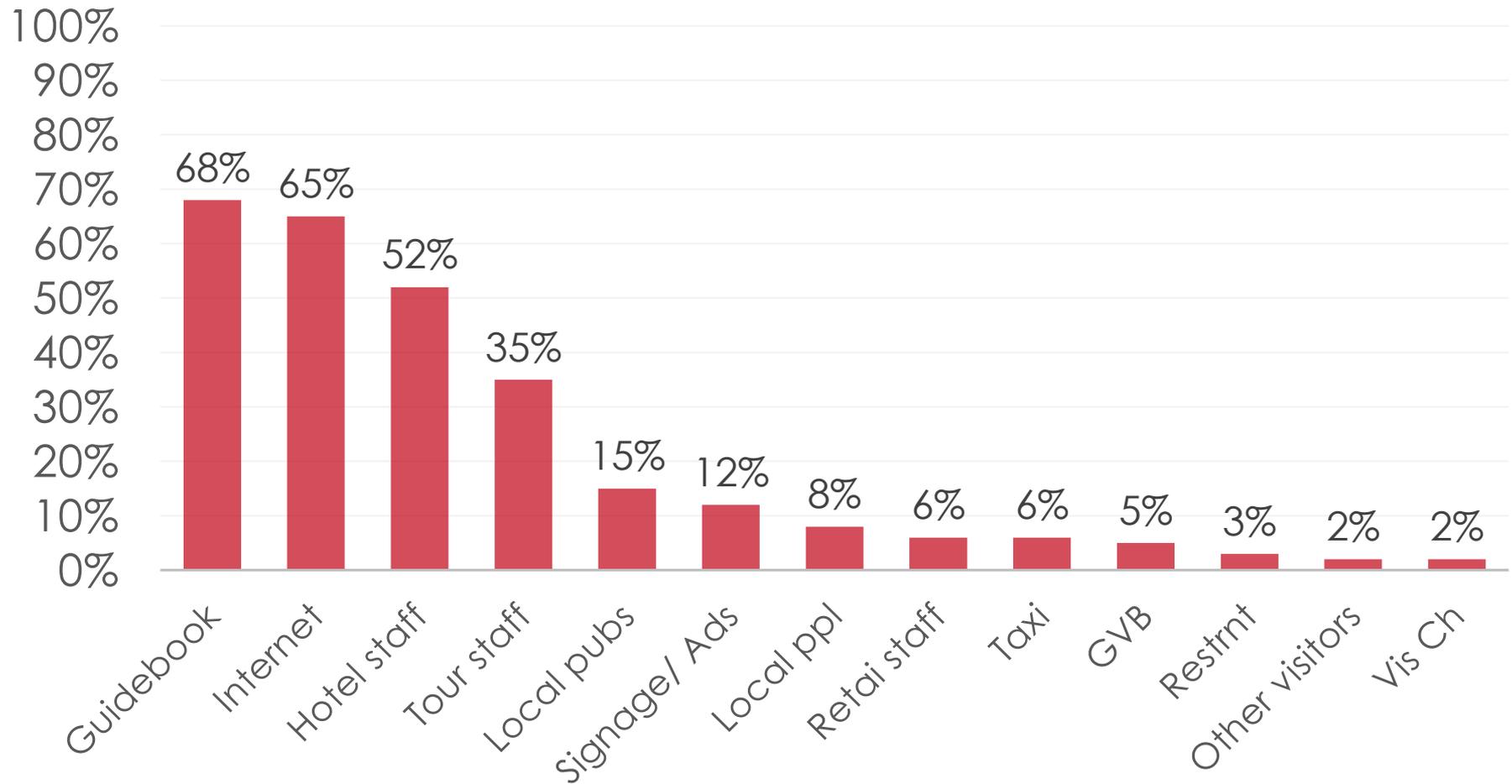
GVB EXIT SURVEY

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%	87%	85%	93%	67%		75%	81%
	Travel guide book at bookstores	62%	64%	56%	68%	67%		25%	69%
	I have been to Guam before	39%	45%	65%	39%	33%		25%	33%
	Travel agent brochure	37%	38%	28%	32%	33%			43%
	Magazine (consumer)	28%	27%	25%	21%			50%	29%
	Friend or relative	25%	17%	17%	21%			50%	26%
	TV	6%	6%	5%	4%			25%	7%
	Guam Visitors Bureau office	3%	2%	4%	7%	33%			2%
	Consumer travel shows	2%	2%	1%	4%				1%
	Guam Visitors Bureau promotional activities	2%	2%	3%	4%	33%			2%
	Co-worker/ company travel department	1%	0%						
	Newspaper	0%	0%	0%					
	Radio	0%							
	Total	348	253	207	28	3		4	89

ONISLE

SOURCES OF INFORMATION



ON-ISLE SOURCES OF INFORMATION – Key Segments

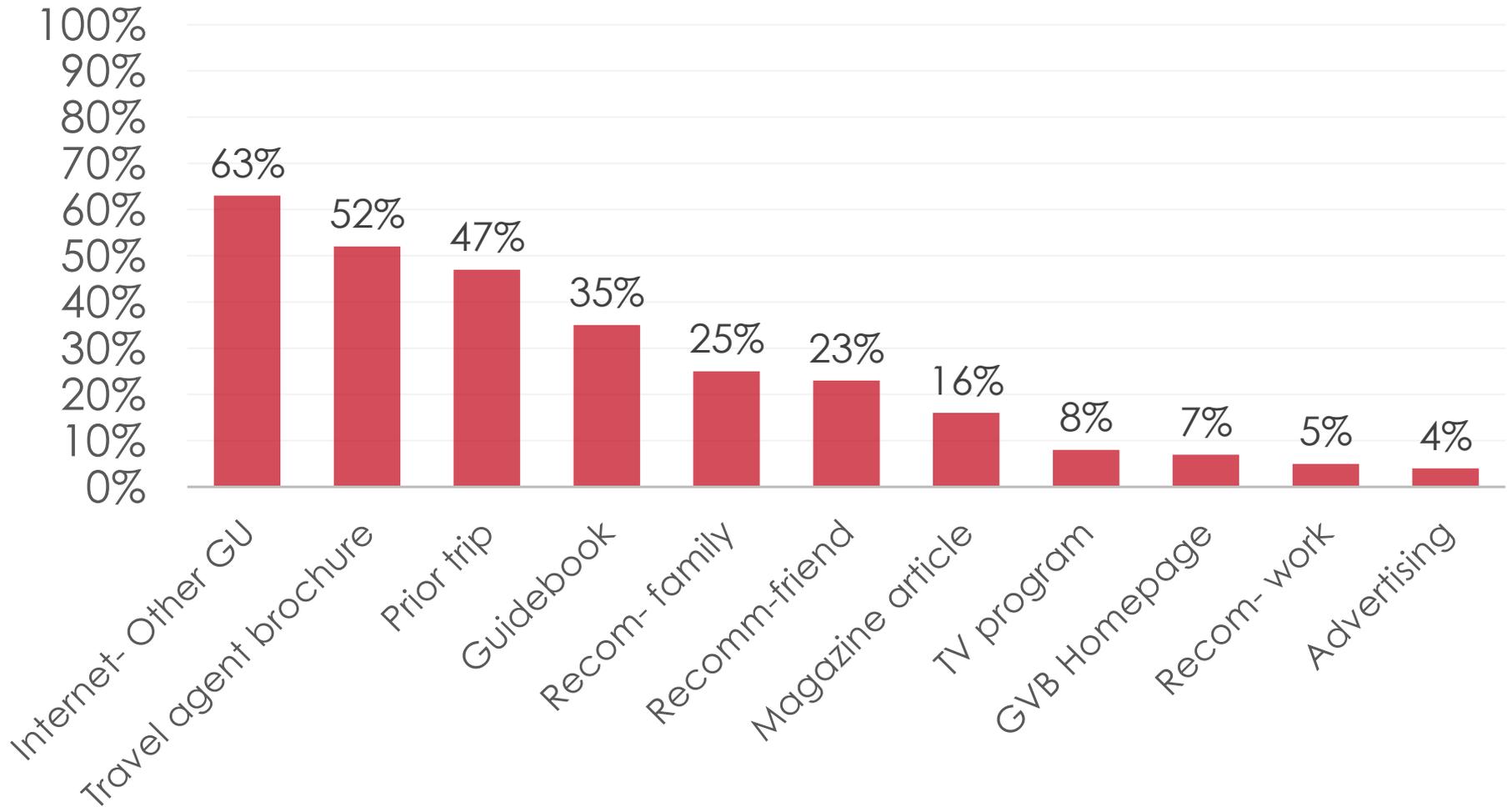
GVB EXIT SURVEY

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	68%	69%	66%	64%	67%		75%	71%
	Internet/Mobile App	65%	65%	68%	75%	67%		25%	57%
	Hotel staff	52%	51%	48%	54%	33%		75%	57%
	Tour staff	35%	38%	34%	39%				34%
	Local publication	15%	17%	17%	14%			25%	20%
	Signs/ advertisement	12%	12%	13%	4%				15%
	Local people	8%	6%	7%		33%			6%
	Taxi drivers	6%	7%	7%	4%			50%	1%
	Retail staff	6%	4%	3%					6%
	Guam Visitors Bureau	5%	4%	6%	14%	33%			3%
	Restaurant staff (outside hotel)	3%	2%	1%					2%
	Visitors channel	2%	3%	4%					3%
	Other visitors	2%	2%	3%	4%				3%
	Total	348	253	207	28	3		4	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?

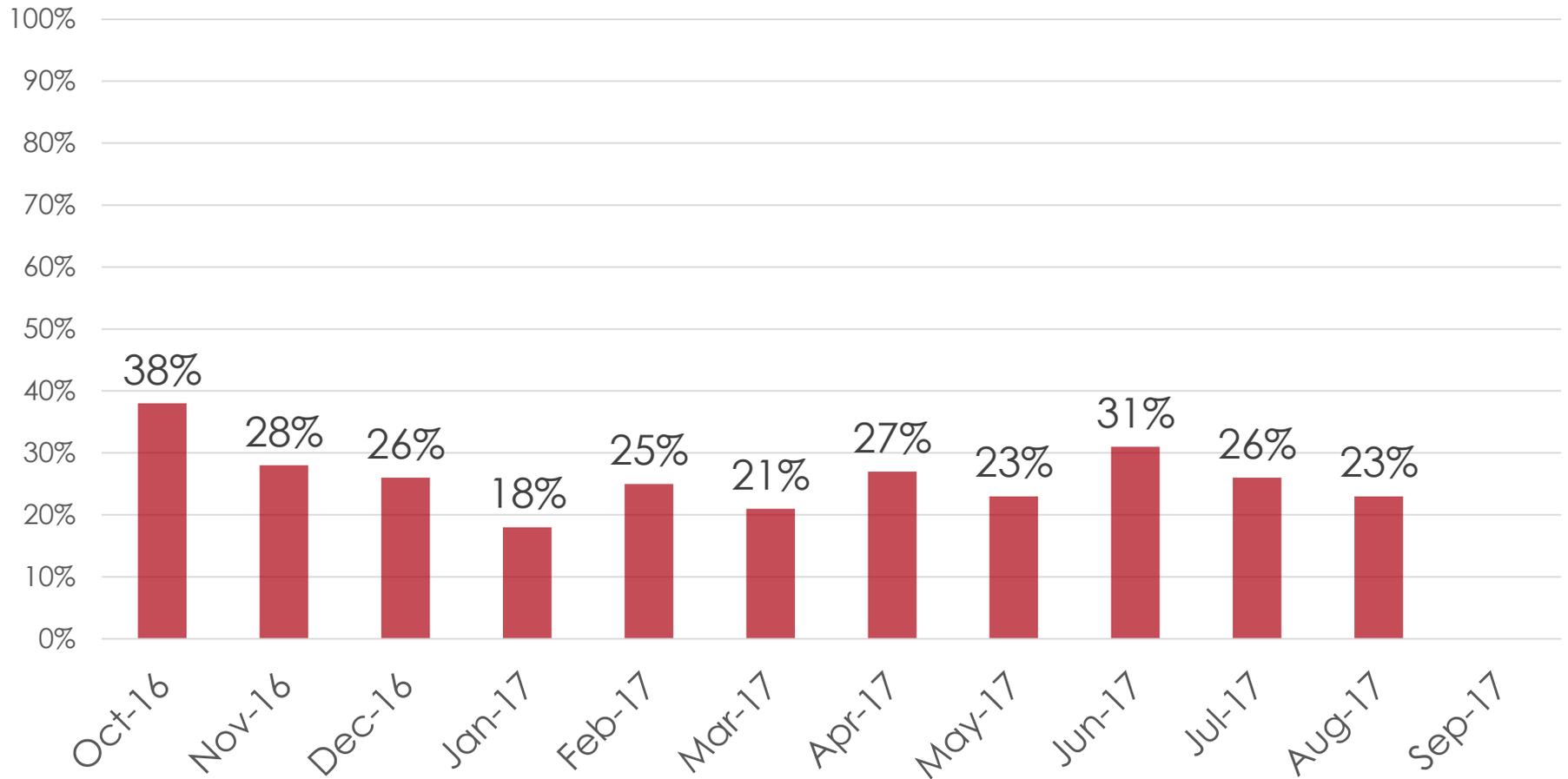
		TOTAL	FAMILY	REPEAT VISITOR	OFFICE LADY	SILVERS	MICE	WEDDING	GROUP TOUR
		-	-	-	-	-	-	-	-
Q5C	Other Guam-related information on internet	63%	65%	60%	68%	67%		50%	62%
	Travel agent brochure	52%	48%	42%	57%	67%		25%	52%
	I have been to Guam before	47%	54%	80%	54%	67%		50%	48%
	Travel Guide Book at bookstores	35%	38%	24%	29%			25%	37%
	Recommendation by family or relatives	25%	33%	27%	11%			25%	28%
	Recommendation by friend	23%	14%	16%	11%	67%		75%	21%
	Magazine article	16%	15%	12%	7%				15%
	TV program	8%	6%	6%	11%				7%
	GVB Japan Home Page	7%	7%	8%	11%				9%
	Recommendation by co-worker	5%	3%	3%	4%				8%
	Advertisement	4%	4%	3%	7%				4%
	Guam Visitors Bureau promotional activities	1%	1%	1%	4%				
	Newspaper article	0%	0%		4%				1%
	Guam Visitors Bureau Office	0%		0%					
	Total	348	253	207	28	3		4	89

Prepared by Anthology Research

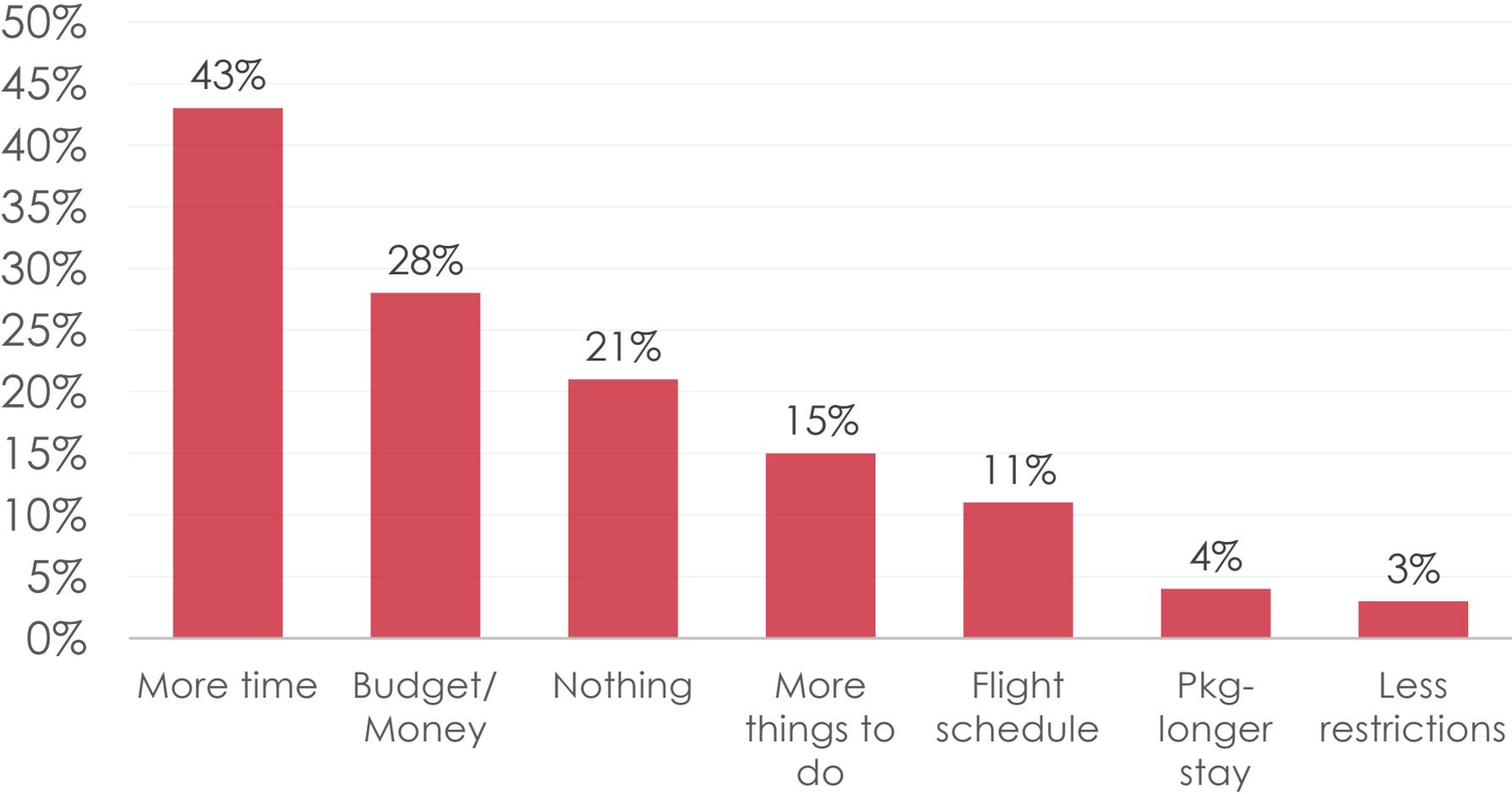
SECTION 6

FUTURE TRAVEL TO GUAM

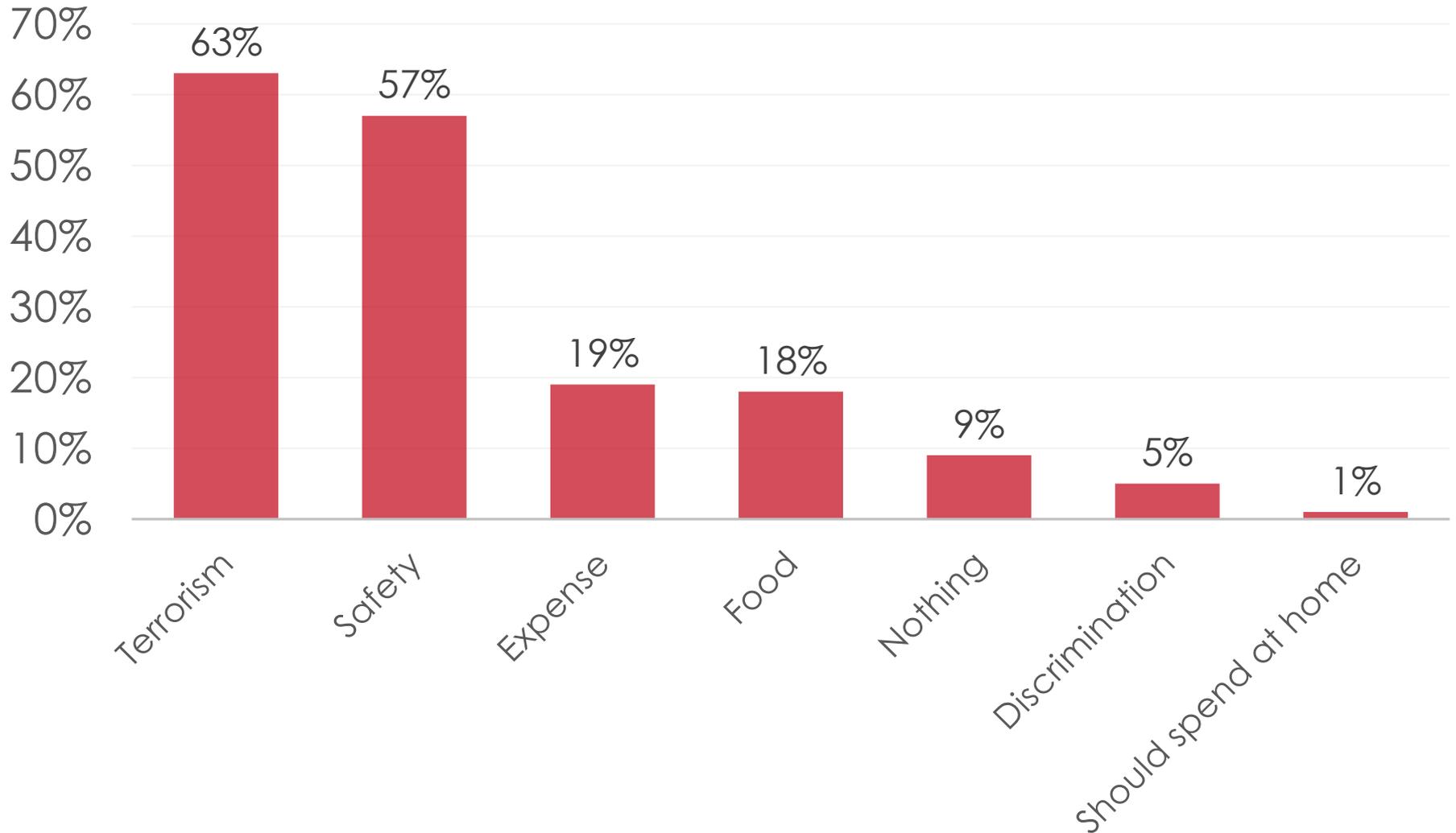
Will security screening/ immigration at Guam Airport impact future travel to Guam?



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



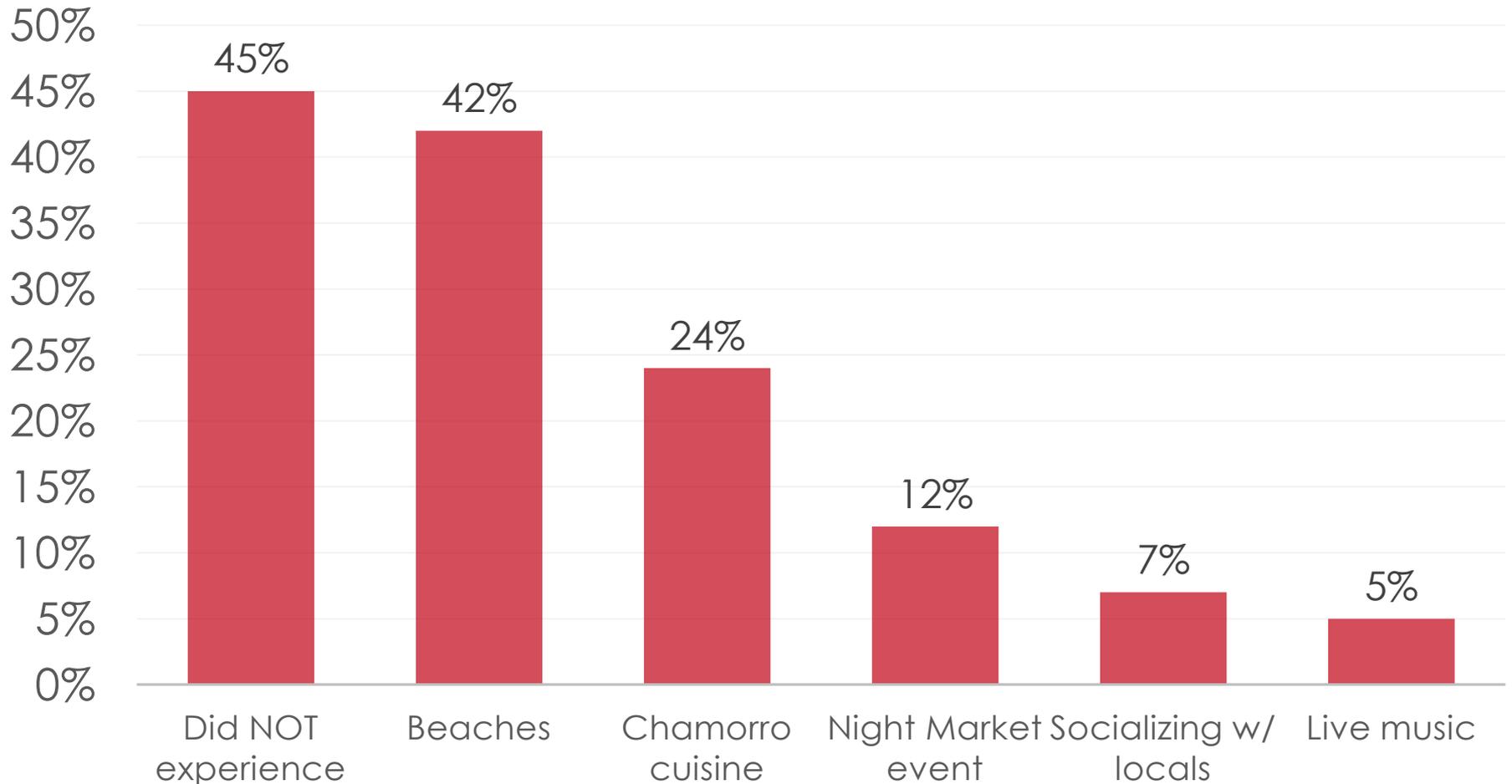
FUTURE TRAVEL CONCERNS



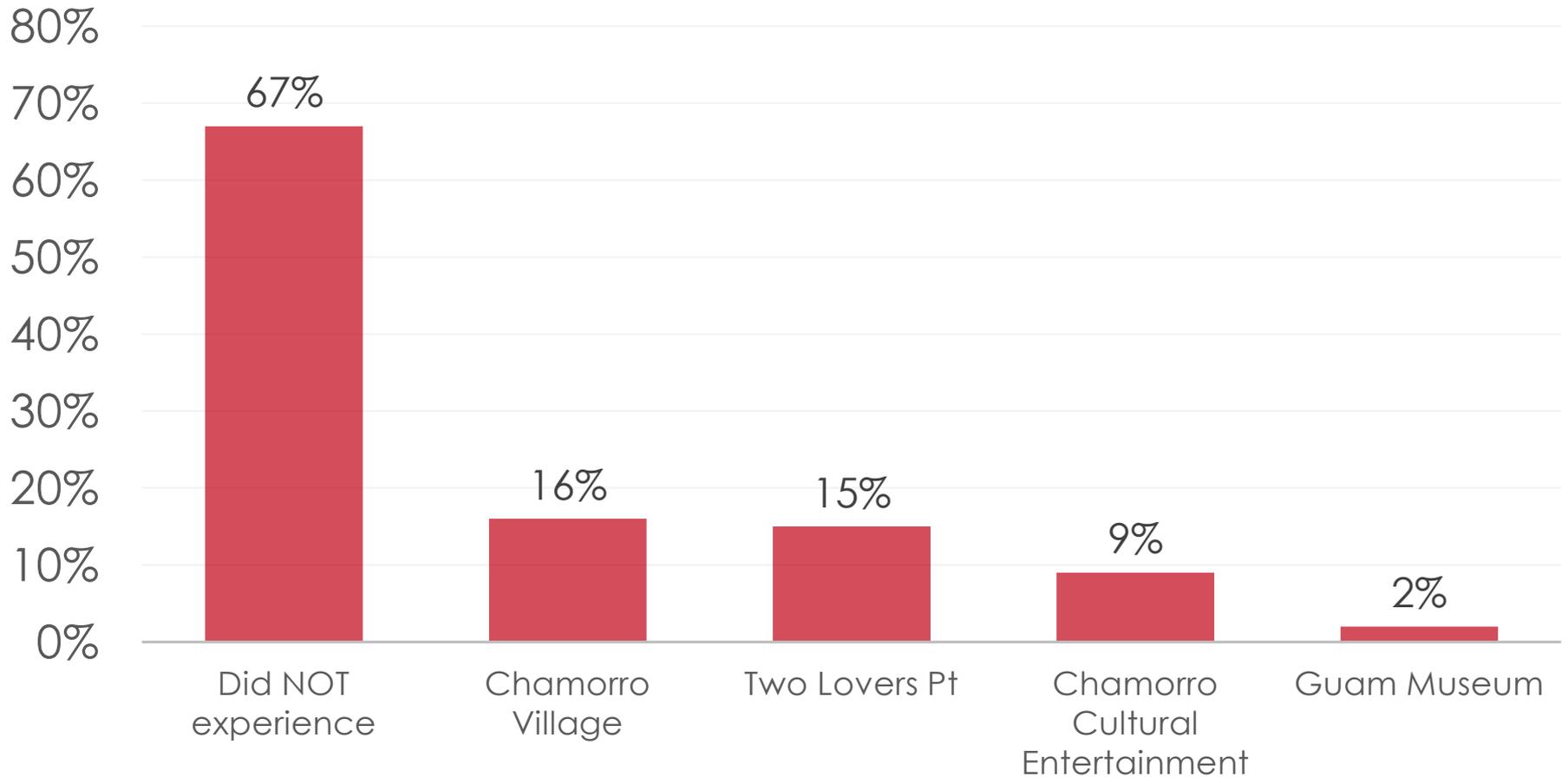
SECTION 7

GUAM CULTURE

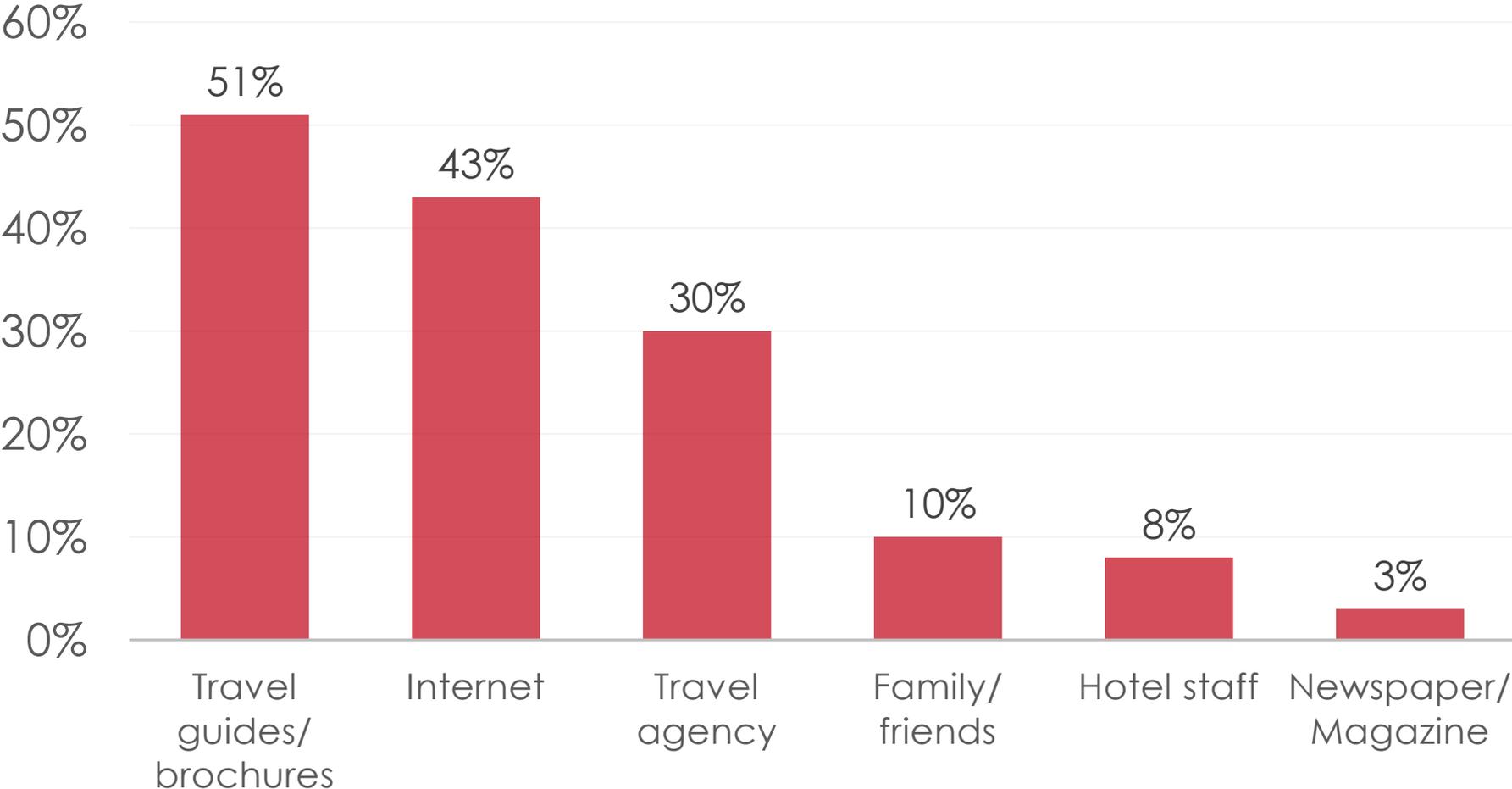
EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



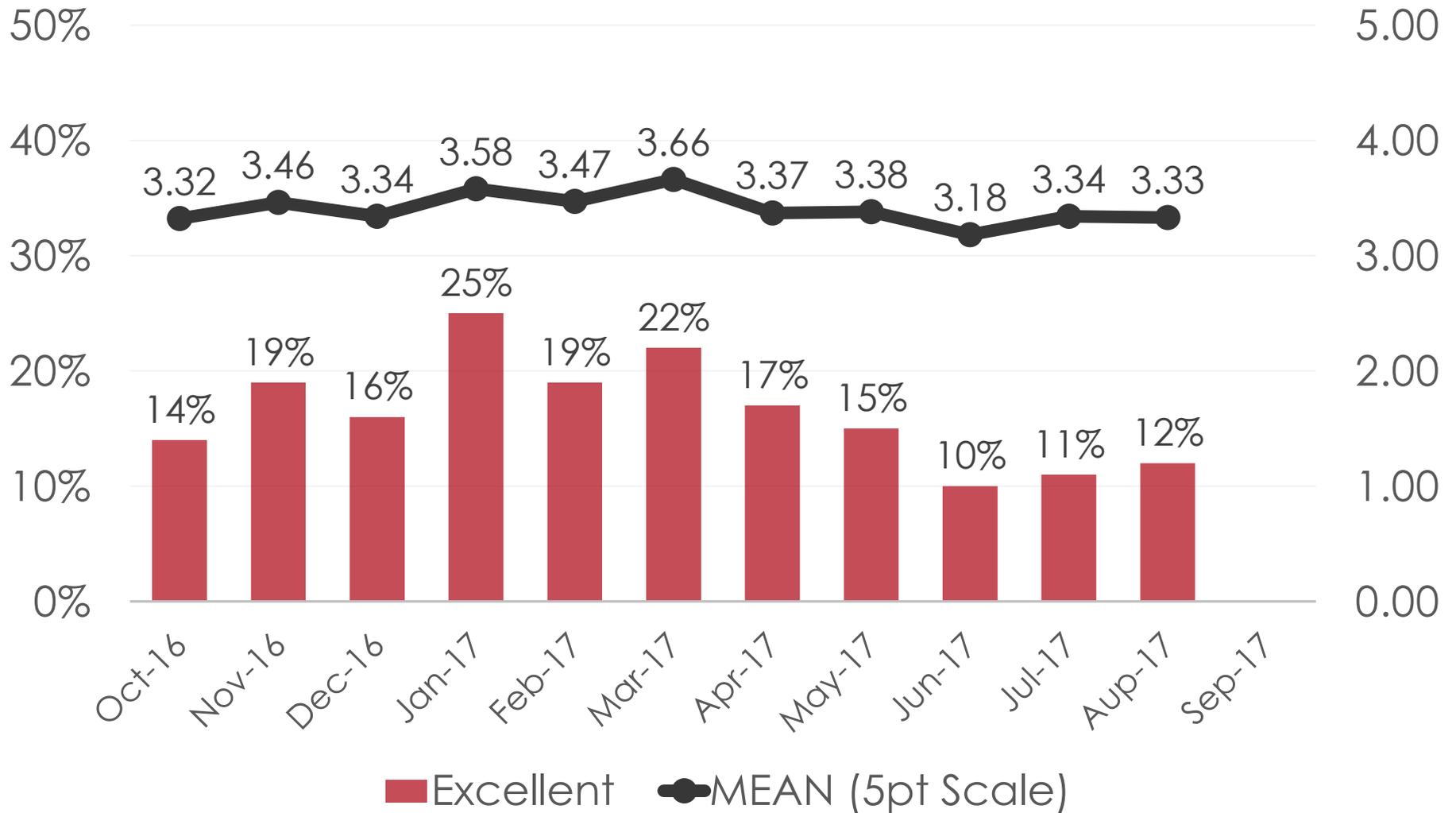
EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



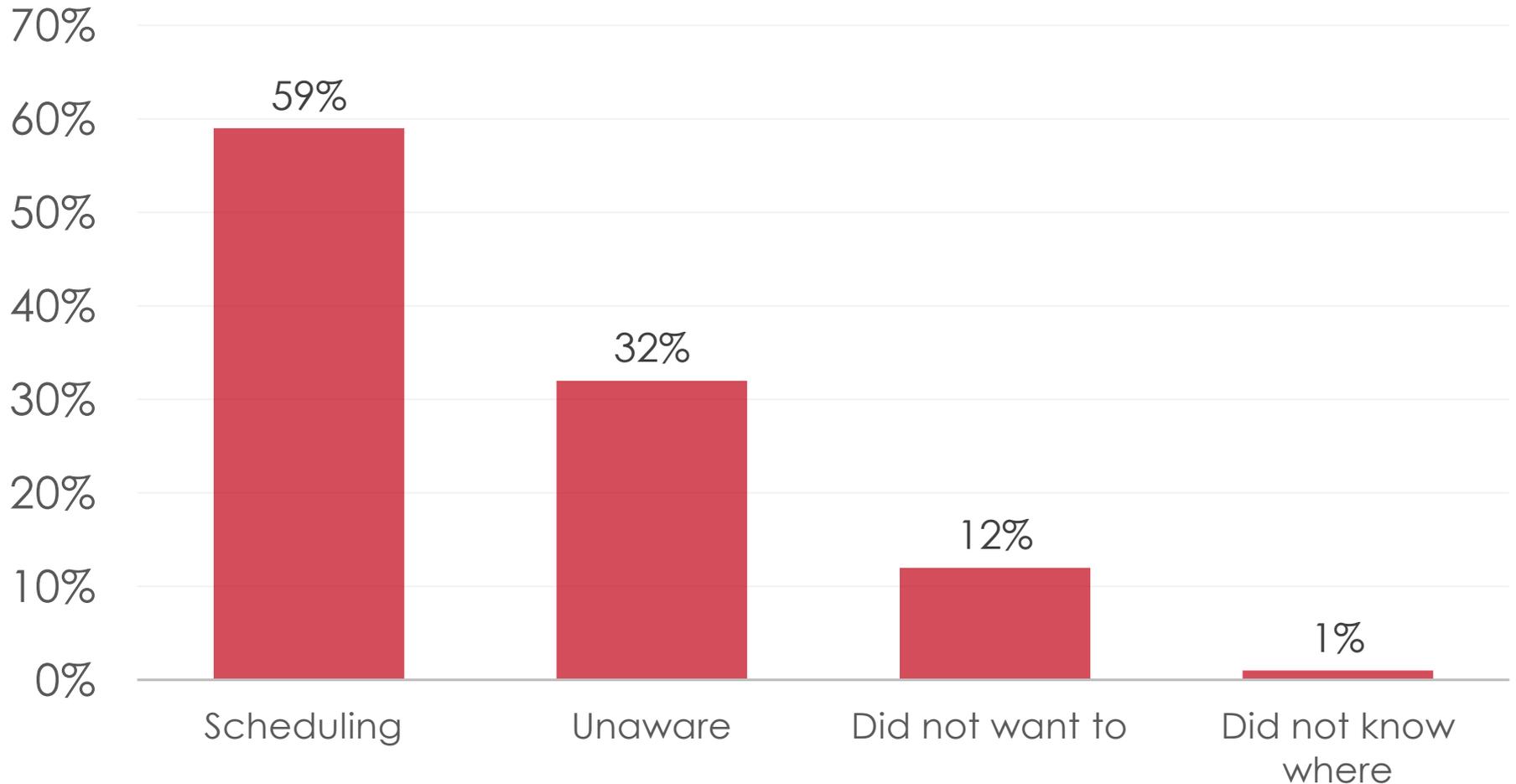
SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS



SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



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, Aug 2017, and Overall Oct 2016 - Aug 2017												
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Combined Oct 2016 - Aug 2017
Drivers:	rank	rank										
Quality & Cleanliness of beaches & parks		4	5			1	2		4	3	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	2
Quality/cleanliness of air, sky		5	3				4					10
Quality/cleanliness of parks											5	11
Quality of landscape in Tumon		2			2			1	1			7
Quality of landscape in Guam			1	1		4	1		6	1	1	1
Quality of ground handler	1	1							3		4	5
Quality/cleanliness of transportation vehicles	4			2	1							
% 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%	55.6%	52.3%

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 August 2017 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of ground handler, and**
 - **Quality & cleanliness of parks.**
- With all five factors the overall r^2 is .556 meaning that **55.6% 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, Aug 2017 and Overall Oct 2016-Aug 2017

	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Combined Oct 2016-Aug 2017
Drivers:	rank											
Quality & Cleanliness of beaches & parks				1								
Ease of getting around				3							3	2
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	1
Variety of shopping											2	
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								3
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%	11.4%	1.2%

NOTE: Only significant drivers are included.

Drivers of On-Isle Expenditures

- **Per Person On Island Expenditure** of Japan visitors on Guam is driven by three significant factors in the August 2017 Period. By rank order they are:
 - **Quality of shopping,**
 - **Variety of shopping, and**
 - **Ease of getting around.**
- With all three factors the overall r^2 is .114 meaning that **11.4% of per person on island expenditure is accounted for by these factors.**