

# GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 FEBUARY 2015



#### Prepared by: QMark Research

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#### Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.



#### **OBJECTIVES**

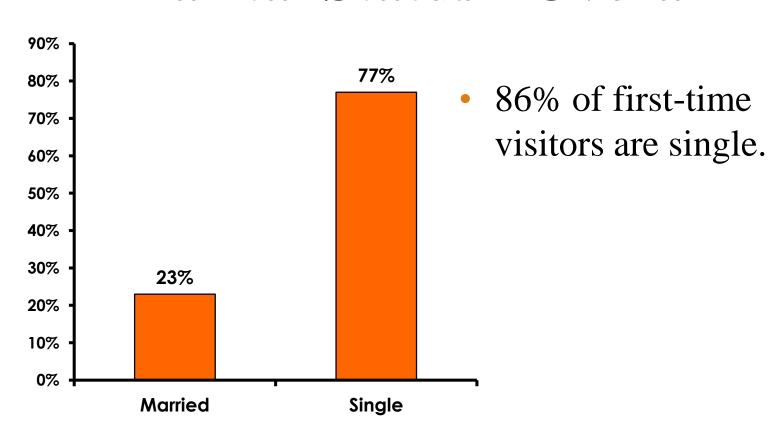
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.



### SECTION 1 PROFILE OF RESPONDENTS

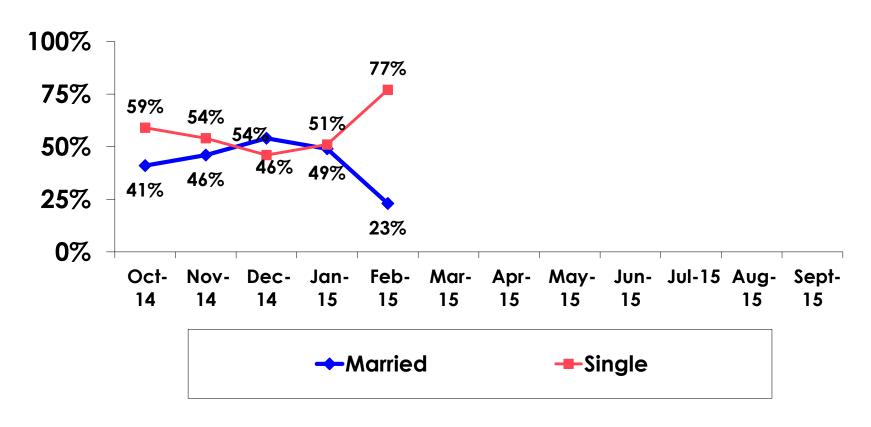


#### **Marital Status - Overall**



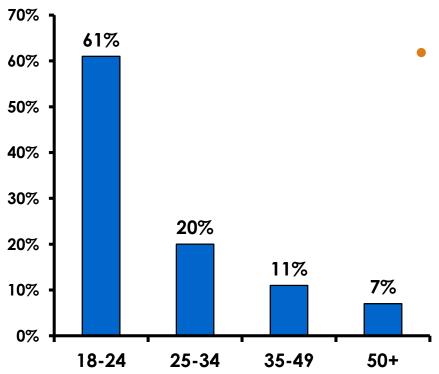


#### MARITAL STATUS





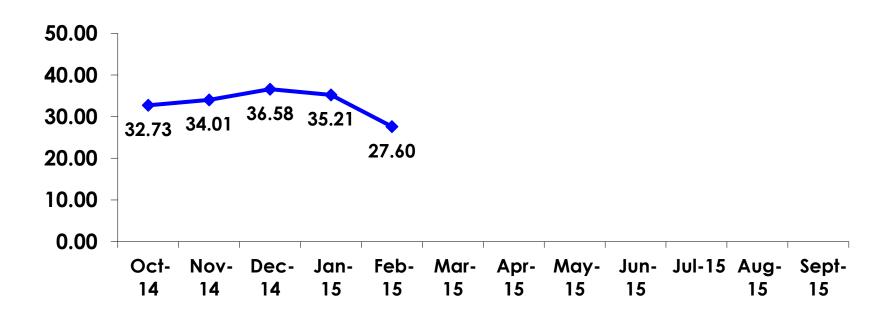
#### Age - Overall



• The average age of the respondents is 27.60 years of age.

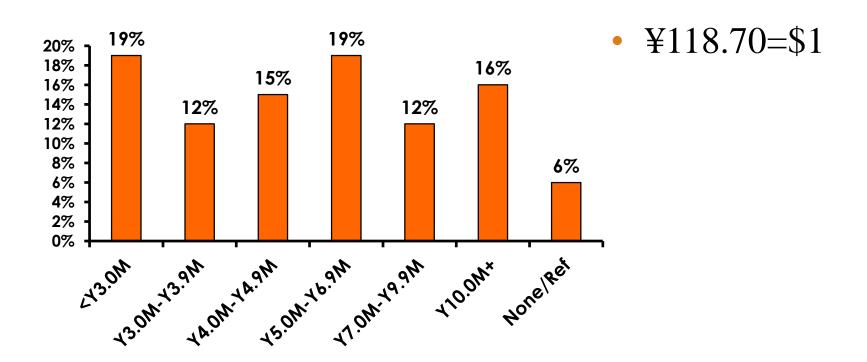


#### **AVERAGE - AGE**



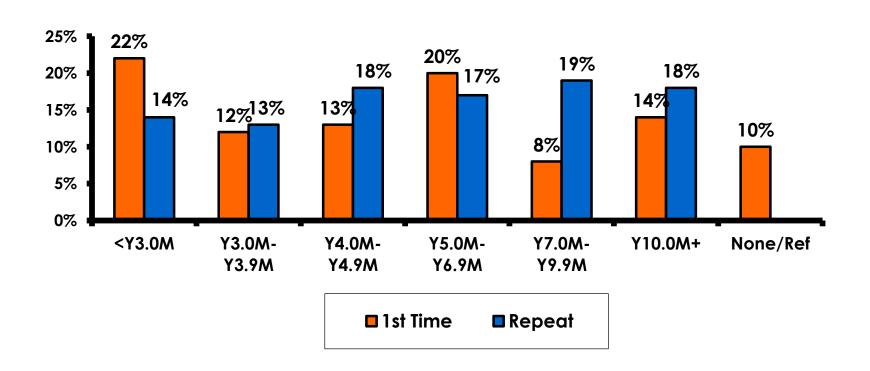


#### **Personal Income**





# Personal Income – 1st time vs. repeat



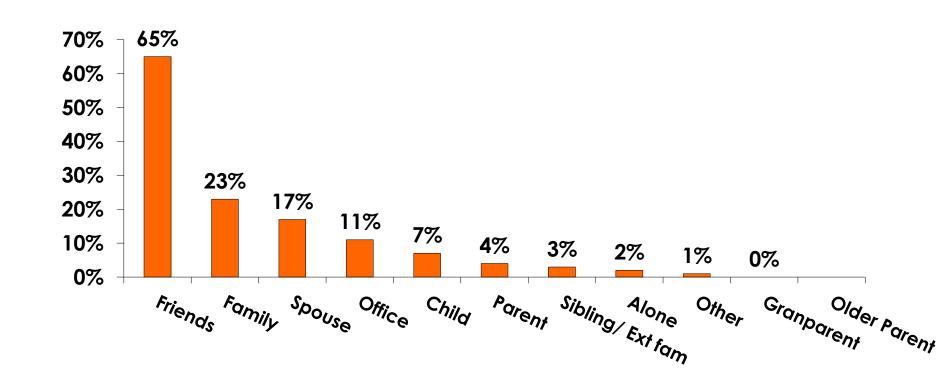


# Personal Income by Gender & Age

			TOTAL	GEN	DER		AC	E .	
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<y2.0 million<="" td=""><td>Count</td><td>19</td><td>9</td><td>9</td><td>19</td><td></td><td></td><td></td></y2.0>	Count	19	9	9	19			
		Column N %	7%	6%	7%	13%			
	Y2.0M-Y3.0M	Count	34	18	15	19	9	2	4
		Column N %	12%	12%	12%	13%	13%	6%	16%
	Y3.0M-Y4.0M	Count	35	13	22	18	13	2	2
		Column N %	12%	8%	18%	12%	19%	6%	8%
	Y4.0M-Y5.0M	Count	42	23	19	15	19	6	2
		Column N %	15%	15%	15%	10%	28%	17%	8%
	Y5.0M-Y7.0M	Count	54	33	21	26	14	9	5
		Column N %	19%	21%	17%	17%	21%	25%	20%
	Y7.0M-Y10.0M	Count	35	19	16	17	5	11	2
		Column N %	12%	12%	13%	11%	7%	31%	8%
	Y10.0M+	Count	44	26	18	21	8	5	10
		Column N %	16%	17%	15%	14%	12%	14%	40%
	No Income	Count	18	14	4	17		1	
		Column N %	6%	9%	3%	11%		3%	
	Total	Count	281	155	124	152	68	36	25



#### **Travel Companions**

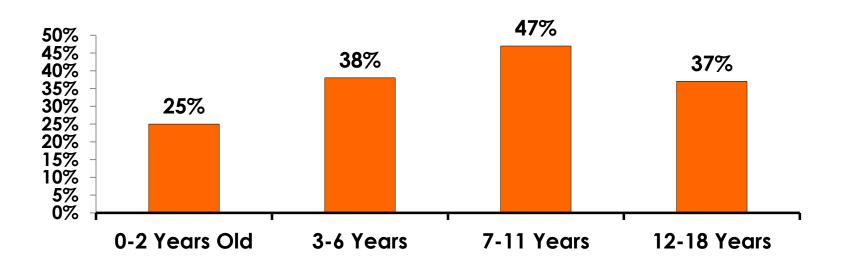




#### **Number of Children Travel Party**

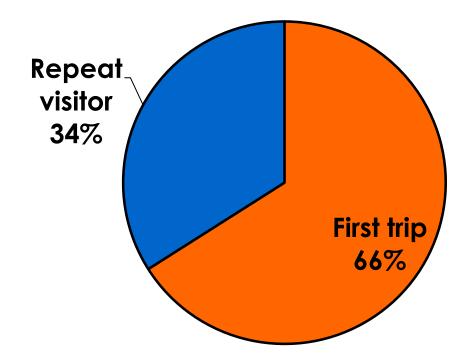
N=24 total respondents traveling with children.

(Of those N=24 respondents, there is a total of 43 children 18 years or younger)



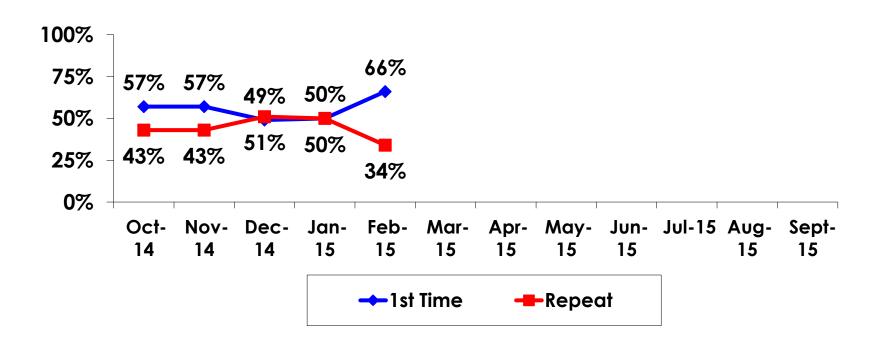


#### **Prior Trips to Guam**





#### PRIOR TRIPS TO GUAM





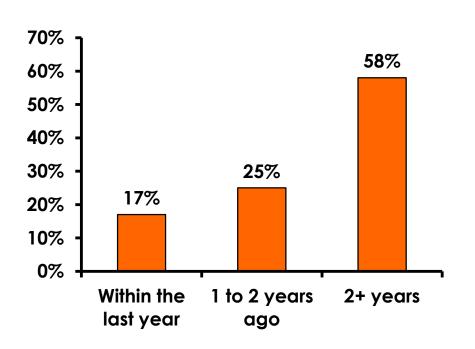
#### Trips to Guam by Age & Gender

			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	169	102	67
		Column N %	49%	45%	56%
	Female	Count	178	125	53
		Column N %	51%	55%	44%
	Total	Count	347	227	120
AGE	18-24	Count	213	169	44
		Column N %	61%	74%	37%
	25-34	Count	71	39	32
		Column N %	20%	17%	27%
	35-49	Count	39	13	26
		Column N %	11%	6%	22%
	50+	Count	26	8	18
		Column N %	7%	3%	15%
	Total	Count	349	229	120

 First-time visitors are younger than repeat visitors to Guam.



### Repeat Visitors Last Trip n = 118

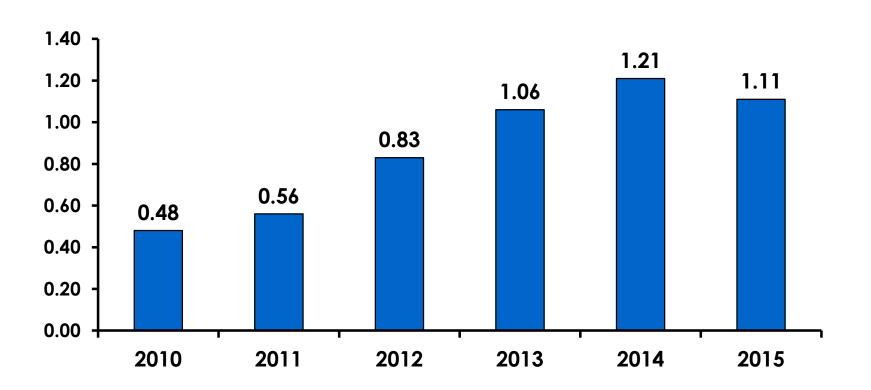


- The average repeat visitor has been to Guam 2.26 times.
- Less than half of repeat visitors have been to Guam within the last 2 years.



#### **Average Number Overnight Trips**

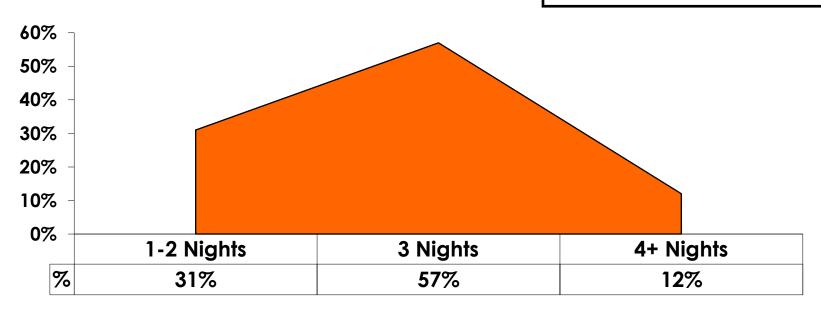
(2010-2015) (2 nights or more)





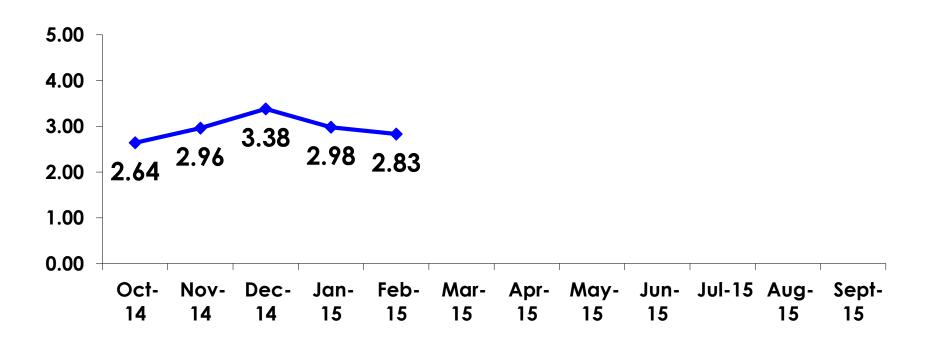
#### Length of Stay

Mean = 2.83 Days Median = 3.0 Days





#### **AVG LENGTH OF STAY**





#### Occupation by Income

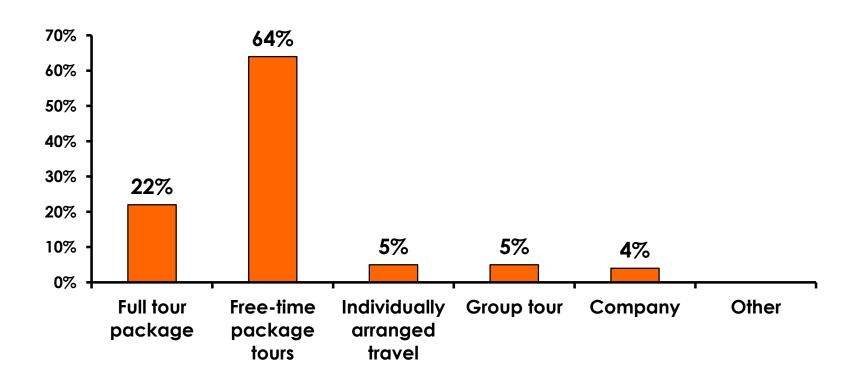
			TOTAL				Q26				
			-	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Student		48%	74%	29%	23%	33%	39%	37%	43%	94%
	Office worker non-mgr		13%	11%	12%	34%	21%	13%	20%	7%	
	Engineer		9%	11%	12%	11%	14%	9%	6%	2%	
	Salesperson		8%		9%	14%	14%	13%	6%	9%	6%
	Manager		5%		3%		2%	4%	11%	20%	
	Skilled worker		4%		9%	3%	2%	9%	3%	2%	
	Self-employed		3%		12%	3%	2%	2%	6%	5%	
	Executive (30+ employees)		2%		3%	3%			6%	7%	
	Other		2%		3%	3%	2%	2%	3%		
	Homemaker		1%				2%		3%	2%	
	Freeter		1%	5%	3%			2%			
	Govt- office worker non- mgr		1%		3%	3%		2%			
	Unemployed		1%		3%		2%				
	Professional/ Specialist		1%			3%	2%				
	Retired		0%								
	Free-lancer		0%					2%			
	Teacher		0%							2%	
	Govt- Executive		0%					2%			
	Govt- Manager		0%					2%			
	Total	Count	341	19	34	35	42	54	35	44	18



## SECTION 2 TRAVEL PLANNING



#### **Travel Planning - Overall**





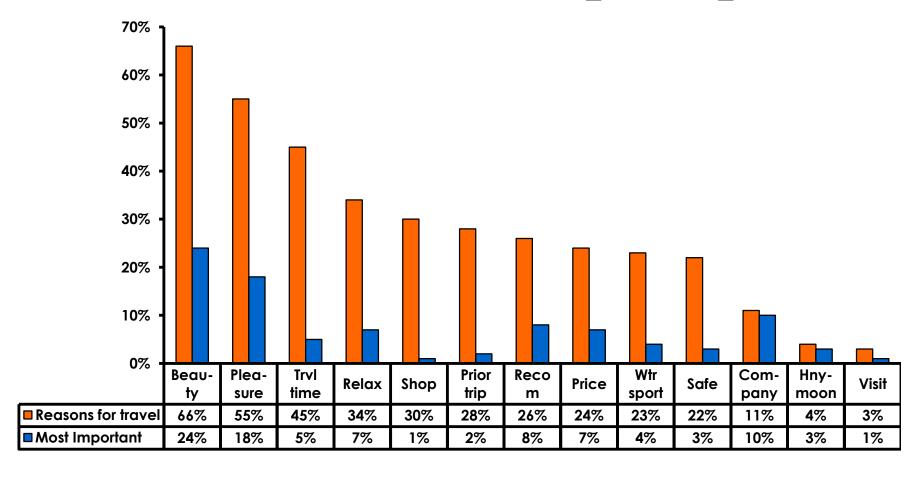
#### **Accommodation by Income**

Average length of stay: 2.83 days

			TOTAL	Q26							
			1	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q9	Guam Plaza Hotel		14%	21%	18%	41%	12%	11%	6%		6%
	PIC Club		11%	11%	26%	18%	5%	9%	11%	7%	
	Guam Reef & Olive Spa		10%	5%	15%	3%	12%	20%	6%	16%	11%
	Pacific Bay Hotel		7%	5%	3%		10%	2%	9%	9%	
	Onward Beach Resort		7%	16%		3%	5%	6%	9%	16%	17%
	Hilton Guam Resort		6%			3%	10%	7%	17%	11%	
	Outrigger Guam Resort		6%		9%	6%	14%	6%	17%	2%	
	Royal Orchid Guam		5%	16%	6%		2%			7%	11%
	Grand Plaza Hotel		4%	11%	3%	3%	7%	4%	6%		
	Oceanview Hotel		4%	5%		3%		4%	3%	5%	11%
	Fiesta Resort Guam		4%				10%	7%	3%		
	Westin Resort Guam		4%		9%	12%		4%	3%	7%	
	Sheraton Laguna Guam		3%	5%	6%	3%	2%			5%	
	Hotel Nikko Guam		3%				2%	4%	6%	7%	6%
	Tumon Bay Capital Hotel		3%		6%		2%	4%		2%	11%
	Holiday Resort Guam		2%				2%	6%	6%	2%	
	Pacific Star Resort & Spa		2%				2%	6%			
	Other		1%	5%							22%
	Hotel Santa Fe		1%					2%		2%	6%
	Bayview Hotel		1%				2%				
	Lotte Hotel Guam		1%			6%					
	Leo Palace Resort		1%							2%	
	Total	Count	349	19	34	34	42	54	35	44	18



#### **Travel Motivation - Top Responses**





# **Most Important Reason for Choosing Guam**

- Guam's natural beauty/ beaches,
- Pleasure,
- Business trip
   are the primary reasons for visiting during
   this period.



#### Motivation by Age & Gender

			TOTAL		AG	Ε		GEN	DER
			-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty		66%	68%	61%	59%	73%	63%	69%
	Pleasure		55%	60%	54%	41%	35%	51%	58%
	Short travel time		45%	36%	59%	62%	54%	47%	44%
	Relax		34%	28%	46%	38%	42%	37%	31%
	Shopping		30%	33%	30%	18%	35%	20%	39%
	Previous trip		28%	14%	38%	56%	65%	31%	25%
	Recomm- friend/family/trvl agnt		26%	33%	23%	8%	4%	26%	25%
	Price		24%	26%	21%	31%	8%	21%	28%
	Water sports		23%	27%	23%	10%	15%	20%	26%
	Safe		22%	21%	21%	31%	27%	23%	22%
	Company/ Business Trip		11%	7%	17%	21%	19%	13%	10%
	Other		5%	7%	1%	3%	8%	4%	6%
	Honeymoon		4%	1%	14%	8%		8%	1%
	Visit friends/ Relatives		3%	4%				2%	3%
	Married/ Attn wedding		2%	0%	4%	8%	4%	3%	2%
	Golf		2%	1%		5%	15%	4%	1%
	Scuba		2%	3%	3%			2%	3%
	Company Sponsored		1%	0%	1%			1%	1%
	Organized sports		0%		1%			1%	
	Total	Count	349	212	71	39	26	168	178



#### **Motivation by Income**

			TOTAL	Q26							
			1	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q5A	Natural beauty		66%	58%	68%	54%	64%	74%	71%	74%	56%
	Pleasure		55%	32%	53%	40%	50%	65%	51%	65%	56%
	Short travel time		45%	16%	47%	40%	43%	54%	63%	60%	28%
	Relax		34%	21%	32%	43%	43%	43%	43%	40%	28%
	Shopping		30%	5%	47%	37%	29%	28%	34%	28%	17%
	Previous trip		28%	5%	29%	31%	36%	28%	49%	40%	
	Recomm- friend/family/trvl agnt		26%	32%	24%	26%	26%	26%	26%	21%	28%
	Price		24%	32%	21%	17%	31%	24%	29%	33%	17%
	Water sports		23%	32%	18%	14%	26%	24%	31%	23%	17%
	Safe		22%	16%	32%	14%	21%	26%	34%	21%	17%
	Company/ Business Trip		11%	11%	21%	31%	5%	11%	9%	2%	6%
	Other		5%	5%	6%	6%	2%	4%	3%	2%	6%
	Honeymoon		4%		3%	6%	12%	7%	3%	2%	
	Visit friends/ Relatives		3%	5%	3%		2%	4%		5%	
	Married/ Attn wedding		2%			6%	2%		3%	2%	
	Golf		2%	11%	3%			2%	6%	2%	
	Scuba		2%		3%				6%	2%	6%
	Company Sponsored		1%		3%	3%					
	Organized sports		0%					2%			
	Total	Count	349	19	34	35	42	54	35	43	18



### SECTION 3 EXPENDITURES

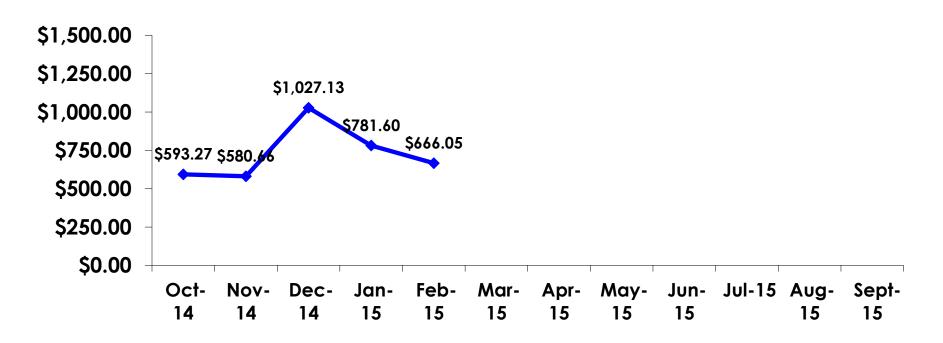


### Prepaid Expenditures ¥118.70/US\$1

- \$1,070.63 = overall mean average prepaid expense (for entire travel party size) by respondent
- $\$0 = \min \text{minimum}$  (lowest amount recorded for the entire sample)
- \$8,425 = maximum (highest amount recorded for the entire sample)
- \$666.05 = overall mean average <u>per person</u> prepaid expenditures



### PREPAID EXPENDITURES Per Person



YTD=\$729.91



### Breakdown of Prepaid Expenditures ¥118.70=\$1

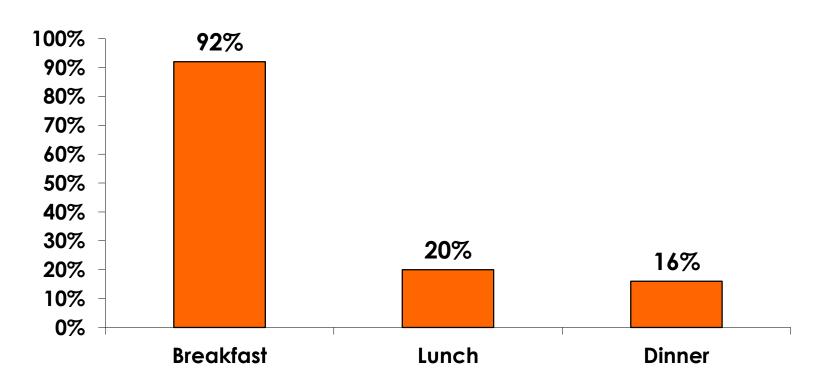
#### (Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,058.62
Air & Accommodation w/ daily meal package	\$2,257.27
Air only	\$843.30
Accommodation only	\$463.35
Accommodation w/ daily meal only	\$577.09
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$55.39
Ground transportation – Guam	\$35.35
Optional tours/ activities	\$181.20
Other expenses	\$327.44
Total Prepaid	\$1,070.63



#### PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=25

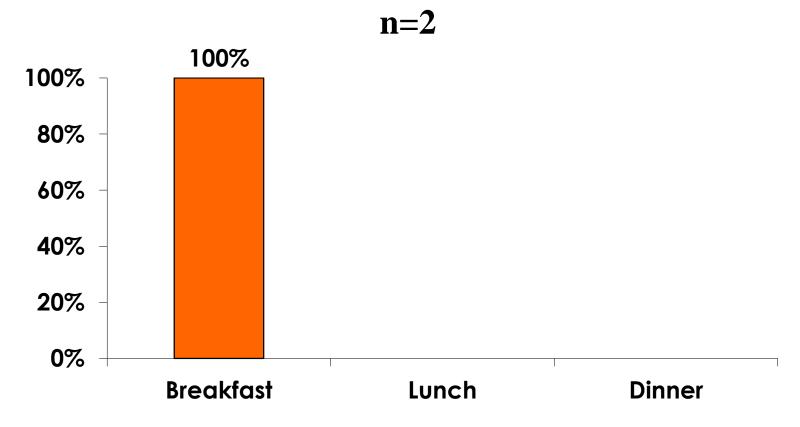


Mean=\$2,257.27 per travel party



#### PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

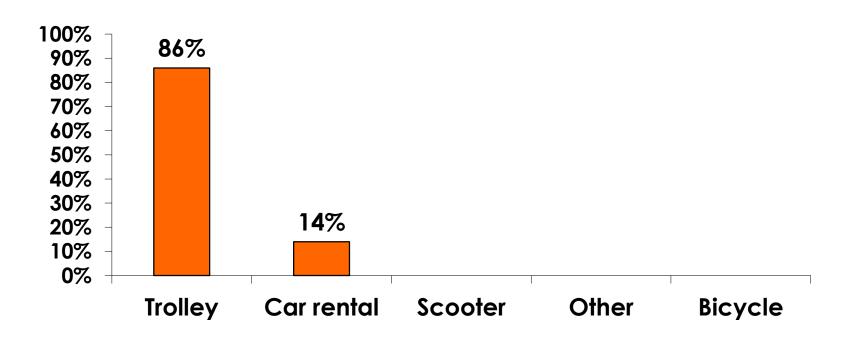


Mean=\$577.09 per travel party



#### PREPAID GROUND TRANSPORTATION

n=7



Mean=\$35.35 per travel party

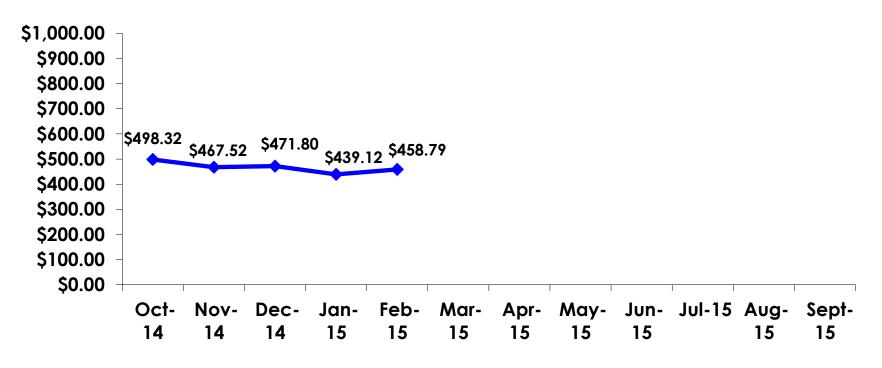


#### **On-Island Expenditures**

- \$632.30 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,500 = Maximum (highest amount recorded for the entire sample)
- \$458.79 = overall mean average <u>per person</u> onisland expenditure



## ON-ISLAND EXPENDITURES Per Person



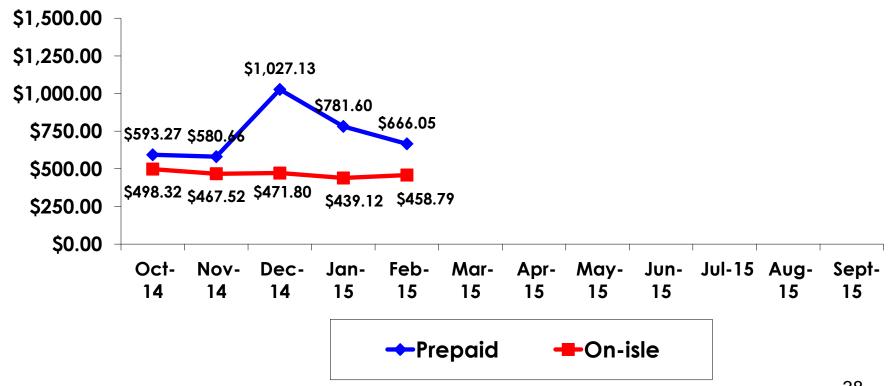
YTD = \$467.11



## PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$729.91

On-Isle YTD = \$467.11





# Total On-Island Expenditure by Gender & Age

	TOTAL GENDER					GENDER								
						Ma	ile		Female					
					AGE				AGE					
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+		
PER PERSON	Mean	\$458.79	\$444.76	\$476.70	\$404.04	\$459.38	\$373.48	\$715.63	\$424.30	\$575.06	\$214.18	\$1,302.71		
	Median	\$400	\$390	\$400	\$400	\$350	\$260	\$500	\$390	\$510	\$188	\$535		
	Minimum	\$0	\$0	\$0	\$0	\$10	\$0	\$0	\$0	\$0	\$0	\$267		
	Maximum	\$6,330	\$2,300	\$6,330	\$2,000	\$1,300	\$1,010	\$2,300	\$3,000	\$2,000	\$400	\$6,330		



# On-Island Expenditure Categories by Gender & Age

		TOTAL GENDER				A	3E	
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$26.80	\$39.70	\$15.01	\$15.20	\$30.70	\$52.87	\$73.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$15
F&B FF/STORE	Mean	\$28.32	\$32.11	\$25.12	\$24.41	\$39.17	\$33.10	\$24.62
	Median	\$5	\$10	\$5	\$7	\$10	\$0	\$0
F&B RESTRNT	Mean	\$63.80	\$80.19	\$48.86	\$41.02	\$83.73	\$120.85	\$112.81
	Median	\$10	\$10	\$5	\$0	\$40	\$21	\$52
OPT TOUR	Mean	\$61.61	\$61.54	\$62.67	\$46.85	\$65.35	\$52.72	\$188.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$114.48	\$122.44	\$108.23	\$78.31	\$195.89	\$97.44	\$218.46
	Median	\$20	\$0	\$37	\$0	\$75	\$0	\$165
GIFT- OTHER	Mean	\$103.07	\$94.76	\$111.86	\$71.02	\$125.76	\$70.62	\$356.35
	Median	\$50	\$50	\$50	\$30	\$50	\$0	\$135
TRANS	Mean	\$9.41	\$10.37	\$8.65	\$6.32	\$14.34	\$9.62	\$21.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$224.63	\$282.64	\$172.19	\$161.51	\$278.94	\$260.26	\$548.58
	Median	\$0	\$0	\$0	\$0	\$2	\$0	\$0
TOTAL	Mean	\$632.30	\$723.59	\$553.13	\$445.01	\$833.30	\$697.46	\$1,544.35
	Median	\$500	\$500	\$415	\$400	\$600	\$700	\$1,000

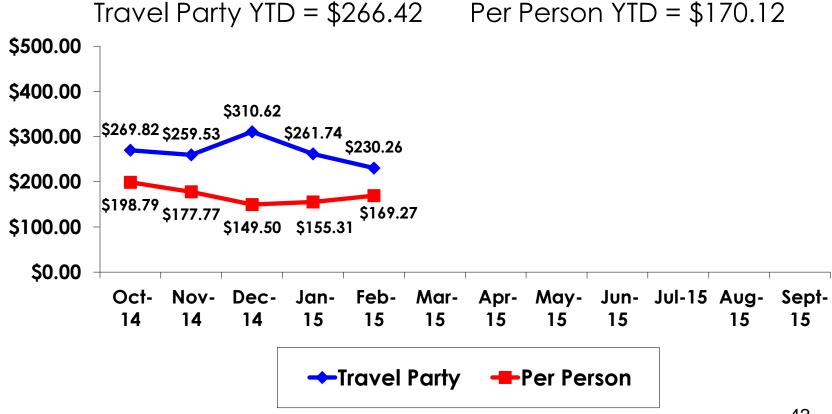


# On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$26.80	\$19.46	\$40.87
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$28.32	\$24.03	\$36.55
	Median	<b>\$</b> 5	\$3	\$8
F&B RESTRNT	Mean	\$63.80	\$59.60	\$71.83
	Median	\$10	\$9	\$15
OPT TOUR	Mean	\$61.61	\$61.04	\$62.69
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$114.48	\$91.65	\$158.23
	Median	\$20	<b>\$</b> 5	\$40
GIFT- OTHER	Mean	\$103.07	\$98.25	\$112.31
	Median	\$50	\$50	\$50
TRANS	Mean	\$9.41	\$8.95	\$10.28
	Median	\$0	\$0	\$0
OTHER	Mean	\$224.63	\$196.80	\$277.96
	Median	\$0	\$2	\$0
TOTAL	Mean	\$632.30	\$559.78	\$771.31
	Median	\$500	\$440	\$500



## ON-ISLE EXPENDITURES – Per Day



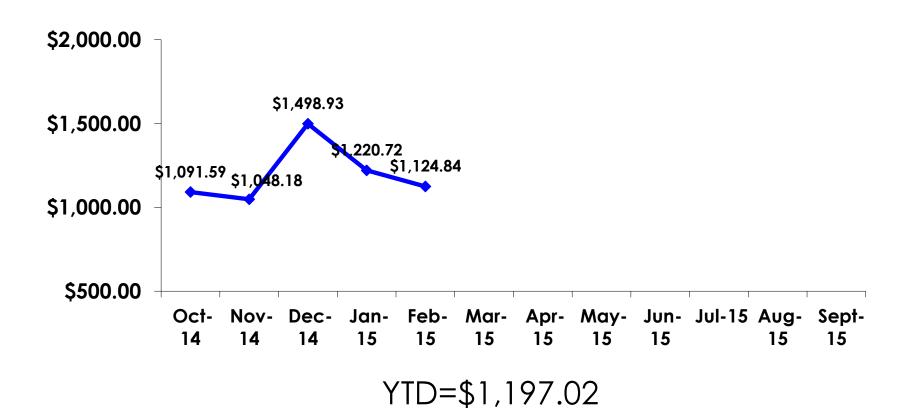


# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,124.84 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,425 = Maximum (highest amount recorded for the entire sample)



## TOTAL EXPENDITURES Per Person



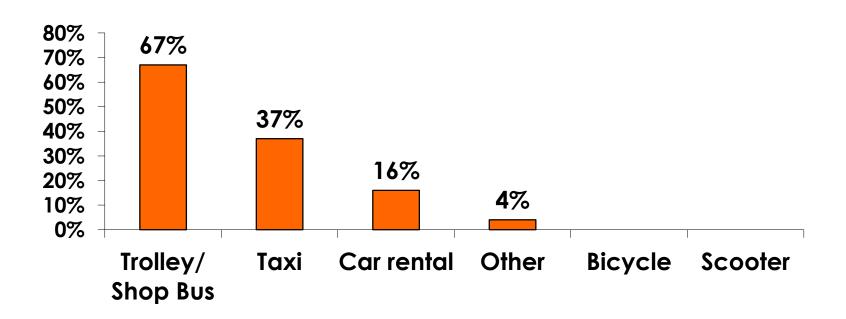


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$26.80
Food & beverage in fast food restaurant/convenience store	\$28.32
Food & beverage at restaurants or drinking establishments outside a hotel	\$63.80
Optional tours and activities	\$61.61
Gifts/ souvenirs for yourself/companions	\$114.48
Gifts/ souvenirs for friends/family at home	\$103.07
Local transportation	\$9.41
Other expenses not covered	\$224.63
Average Total	\$632.30



## **Local Transportation**<sub>n=67</sub>



Mean=\$9.41 per travel party



### **Guam Airport Expenditures**

- \$34.03 = Mean
- \$6 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)



## Breakdown of Airport Expenditures

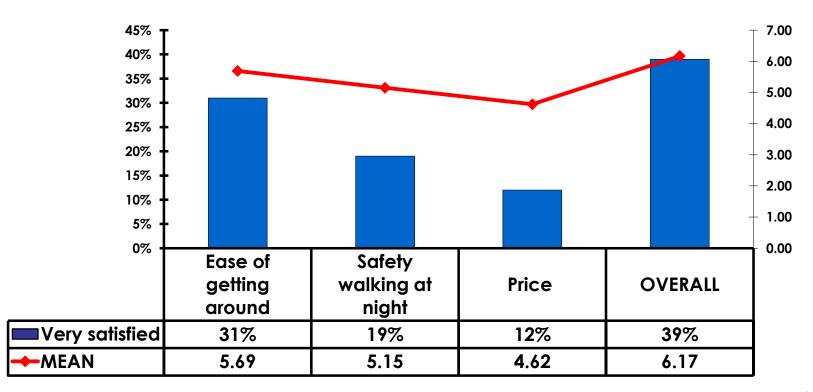
	MEAN \$
Food & Beverages	\$8.29
Gifts/Souvenirs Self	\$13.64
Gifts/Souvenirs Others	\$12.09
Total	\$34.03



## SECTION 4 VISITOR SATISFACTION

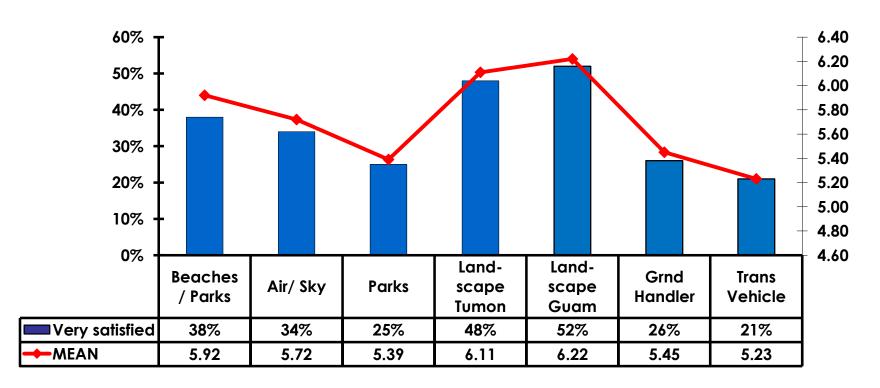


#### **Satisfaction Scores Overall**



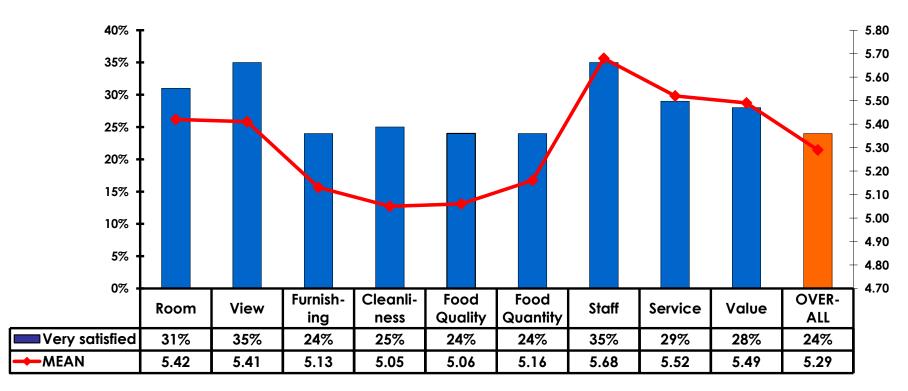


### Satisfaction Quality/ Cleanliness



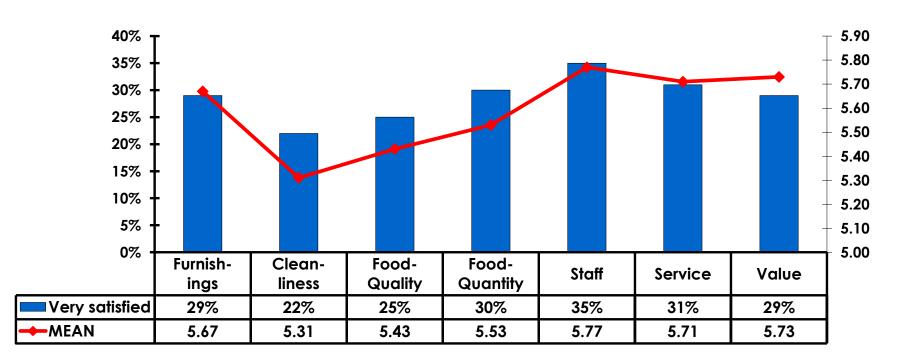


### Quality of Accommodations



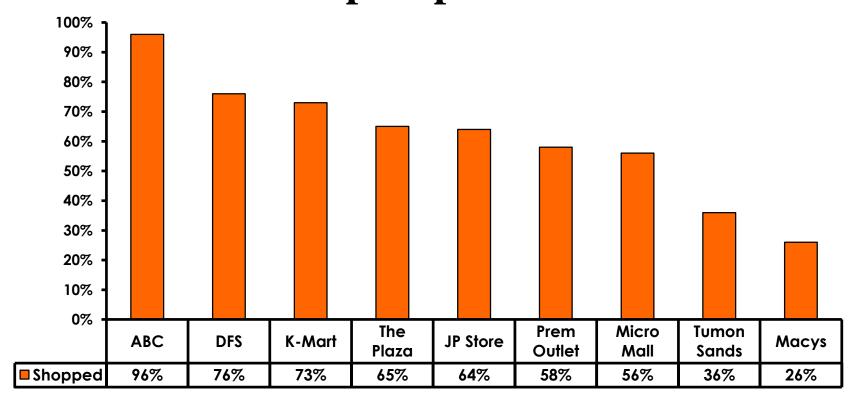


## **Quality of Dining Experience**





## Visits to Shopping Centers/Malls on Guam Top responses



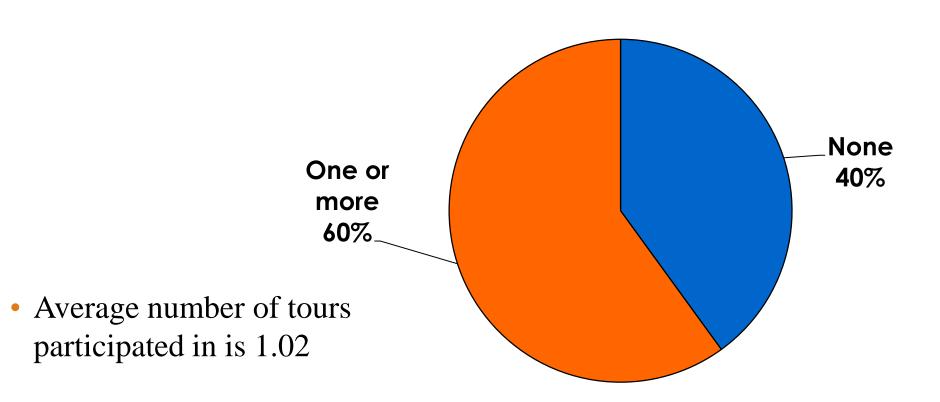


### Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>57</b> %	Score of 6 to 7 = <b>54%</b>
Score of 4 to 5 = <b>39%</b>	Score of 4 to 5 = <b>39%</b>
Score 1 to 3 = <b>5</b> %	Score 1 to 3 = <b>7%</b>
MEAN = 5.54	MEAN = 5.47

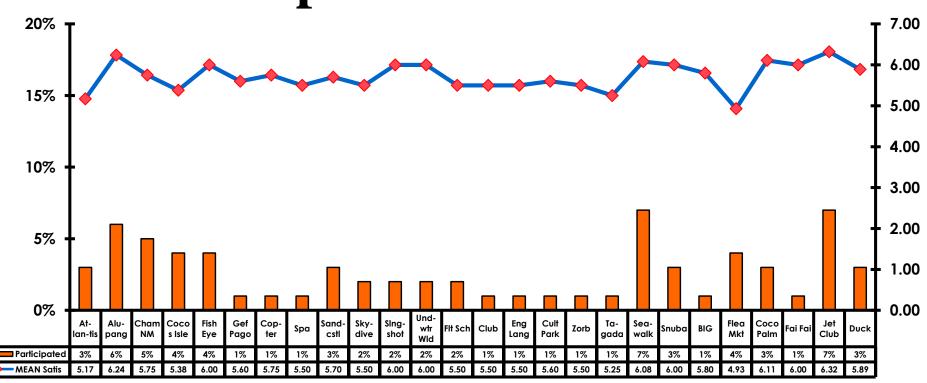


### **Optional Tour Participation**





# Optional Tours Participation & Satisfaction





### **Day Tours Satisfaction**

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>61%</b>	Score of 6 to 7 = <b>58%</b>
Score of 4 to 5 = <b>38%</b>	Score of 4 to 5 = <b>41%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>1%</b>
MEAN = 5.69	MEAN = 5.61

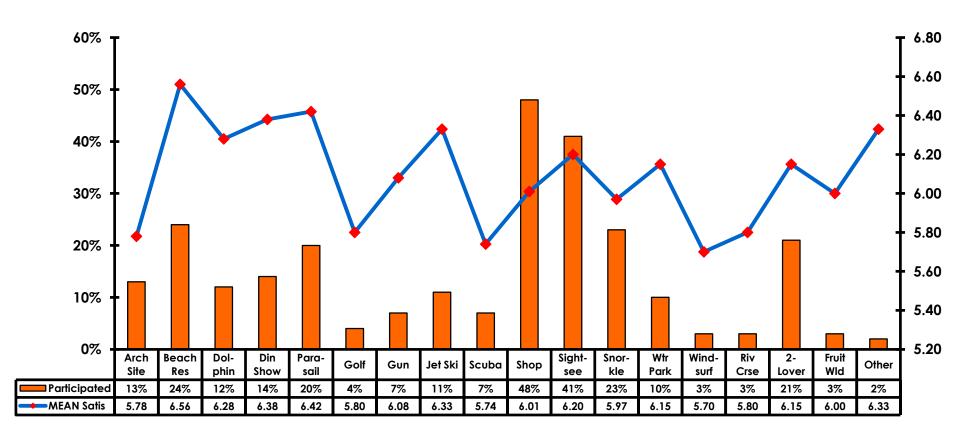


### **Night Tours Satisfaction**

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>31%</b>	Score of 6 to 7 = <b>31%</b>
Score of 4 to 5 = <b>67%</b>	Score of 4 to 5 = <b>66%</b>
Score 1 to 3 = <b>1%</b>	Score 1 to 3 = <b>2</b> %
MEAN = 4.89	MEAN = 4.89

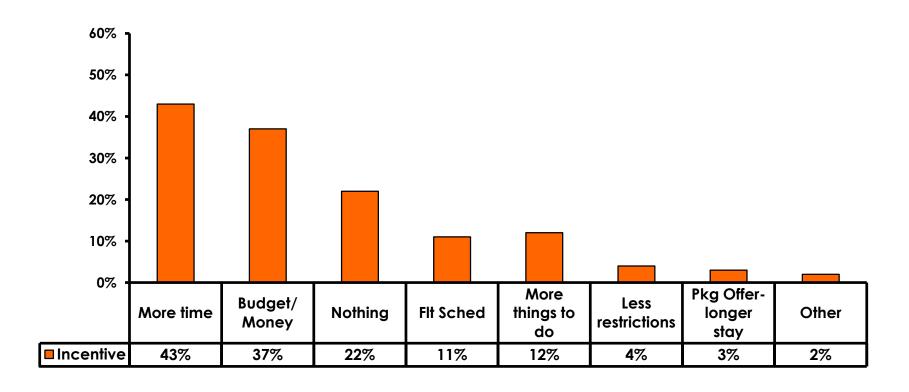


#### Satisfaction with Other Activities





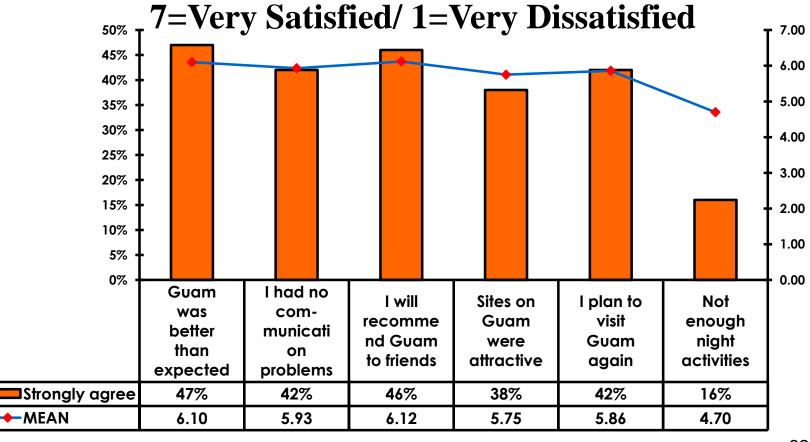
## What would it take to make you want to stay an extra day in Guam?





### **On-Island Perceptions**

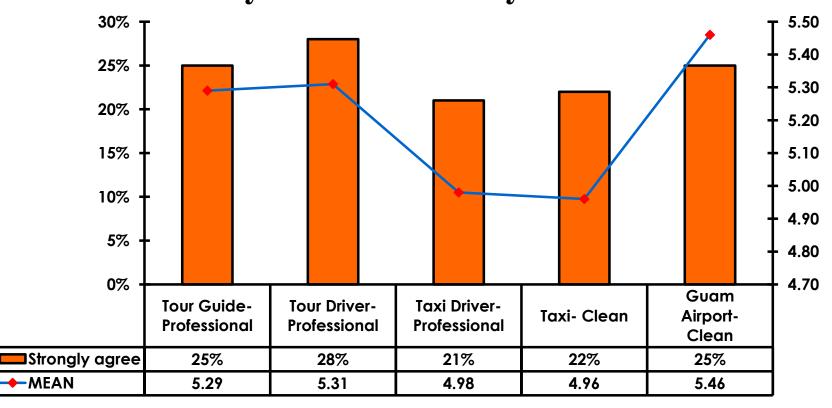






### **On-Island Perceptions**

7pt Rating Scale 7=Very Satisfied/ 1=Very Dissatisfied

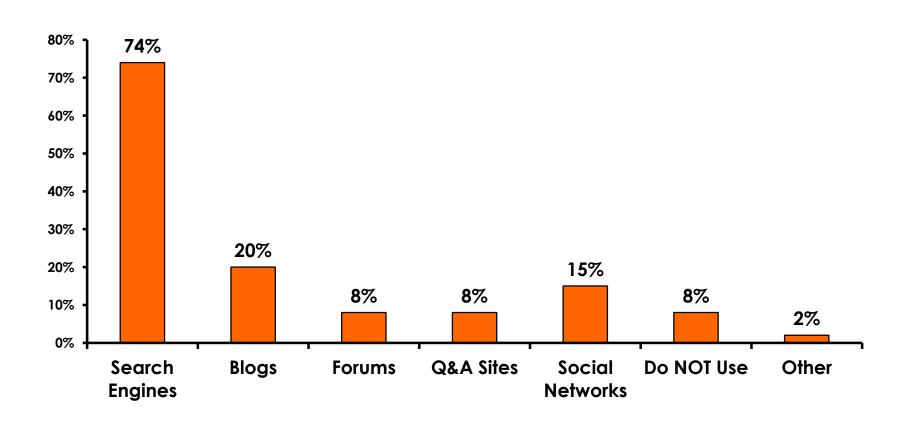




## SECTION 5 PROMOTIONS

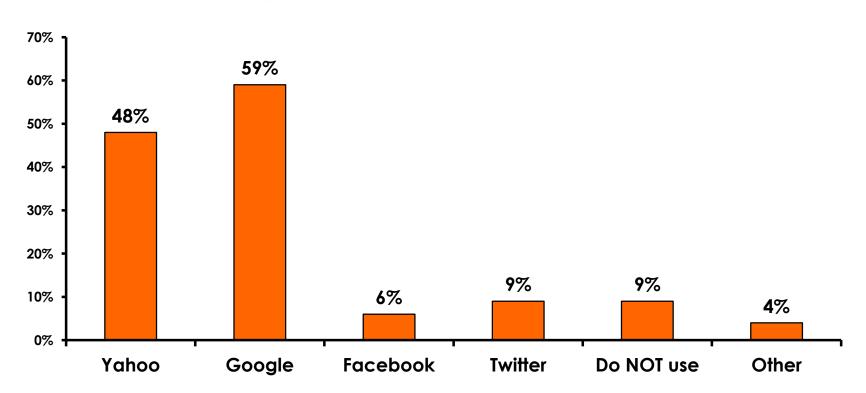


#### **Internet- Guam Sources of Info**



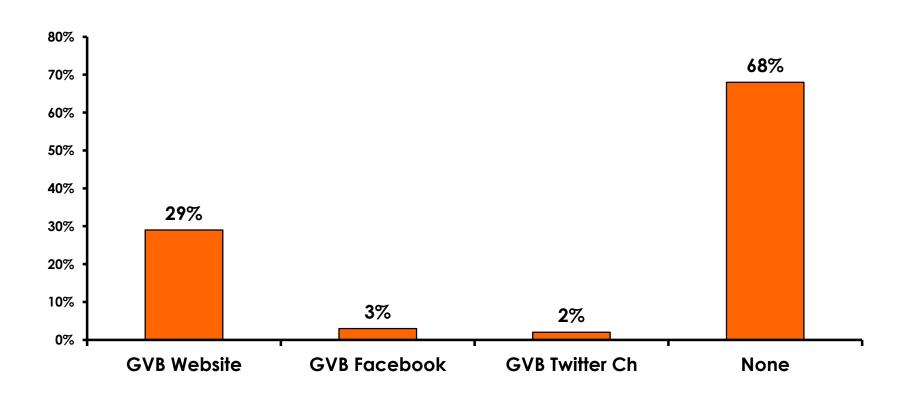


# Internet- Things To Do Sources of Info



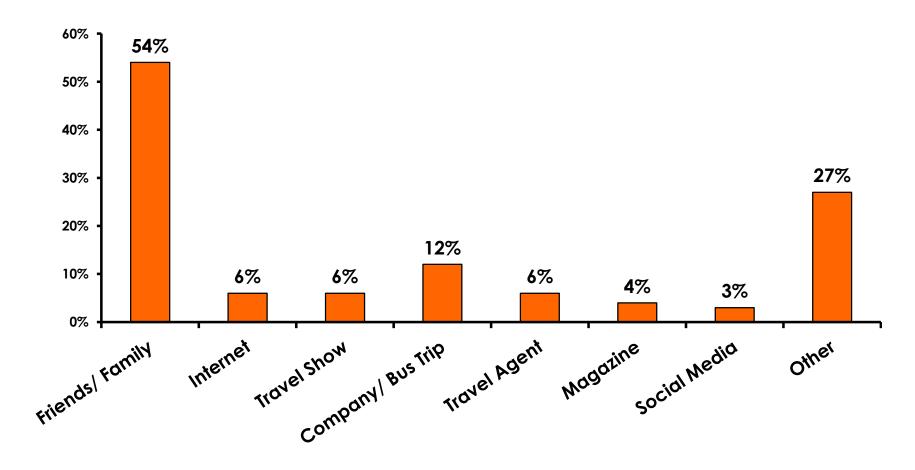


#### **Internet- GVB Sources**



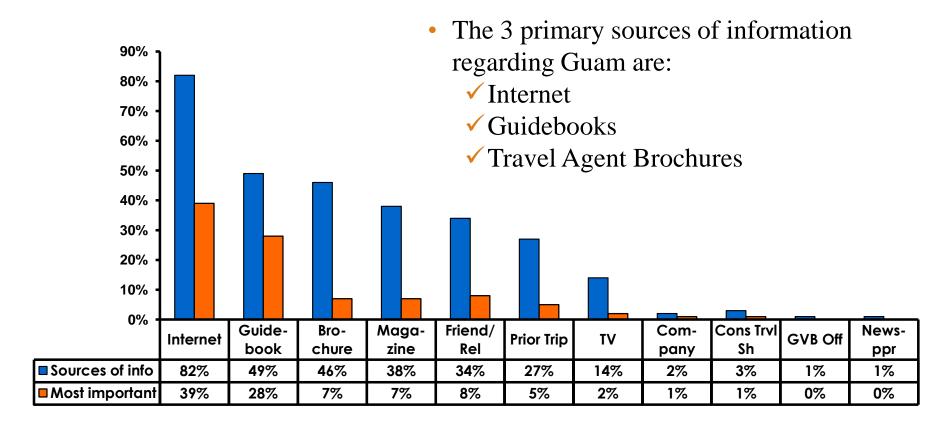


#### **Travel Motivation-Info Sources**



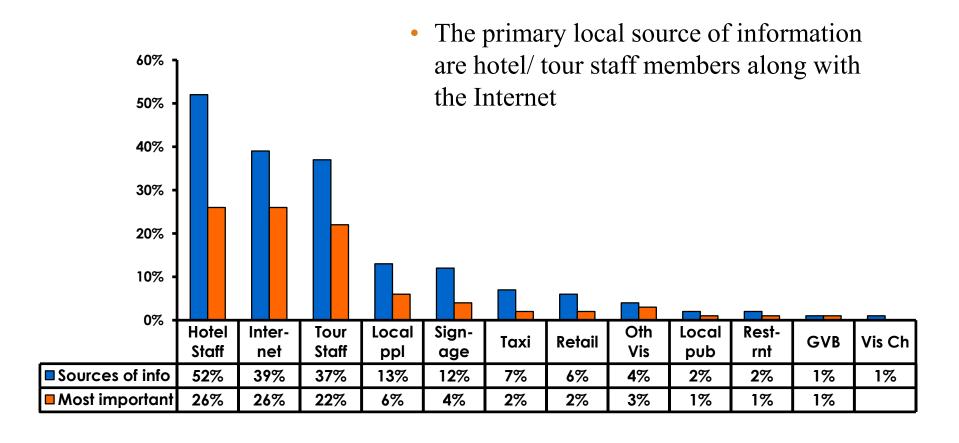


#### **Sources of Information Pre-arrival**





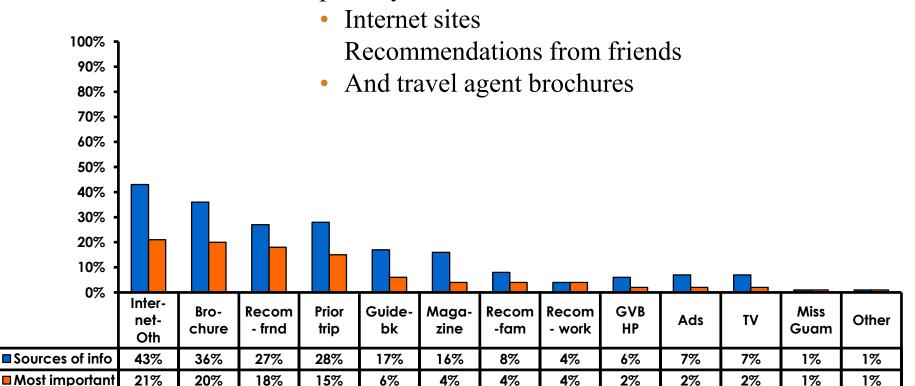
#### **Sources of Information Post-arrival**





#### **Sources of Information - Motivation**

The primary motivational sources of information were:

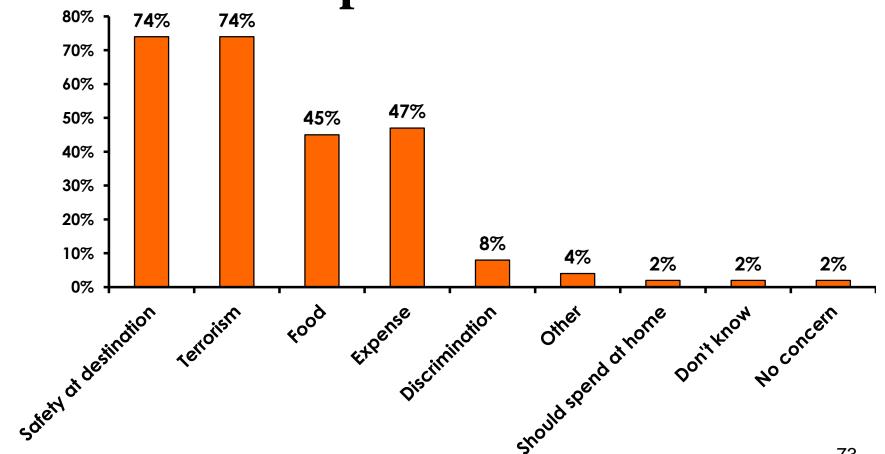




## SECTION 6 OTHER ISSUES



### Concerns about travel outside of Japan - Overall



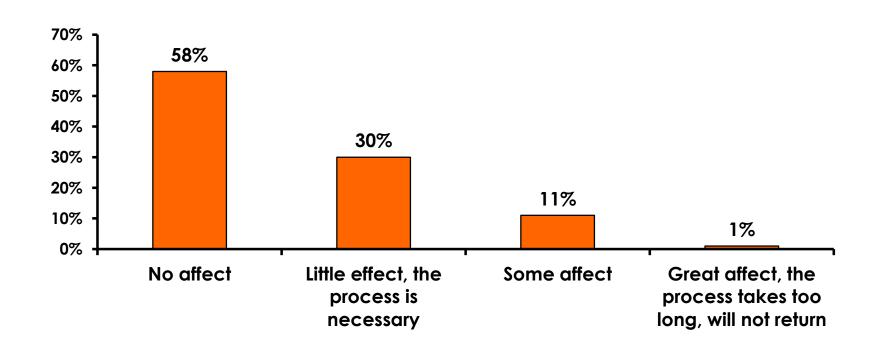


# Concerns about travel outside of Japan - By Age & Income

TOTAL					AC	E					Q26				
			-	18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q21	Safety		74%	71%	77%	86%	73%	74%	71%	71%	88%	78%	74%	79%	72%
	Terrorism		74%	70%	73%	92%	77%	74%	68%	74%	85%	74%	74%	84%	72%
	Expense		47%	47%	46%	46%	46%	42%	47%	40%	54%	48%	49%	49%	56%
	Food		45%	41%	50%	49%	58%	26%	44%	49%	59%	43%	40%	56%	44%
	Discrimination against Japanese		8%	8%	10%	11%	4%		15%	3%	12%	6%	6%	14%	22%
	Other		4%	4%	4%	3%	4%		3%		2%	6%	11%	5%	
	No concerns		2%	2%	3%		8%	5%	3%		2%	4%	6%	2%	
	Should spend at home		2%	1%	3%	5%	4%		6%	3%		2%		2%	6%
	Don't know		2%	2%	1%			5%			2%				
	Total C	ount	344	210	70	37	26	19	34	35	41	54	35	43	18



## Security Screening/Immigration Process at Guam International Airport





### **Airport Screening**

#### 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

