



Guam Visitors Bureau

Korea In-Market Insight Report

SEPTEMBER 2021

[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 leisure travel from the source market covered by the study: Korea.
 - 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 Korean.



Methodology

- Anthology Research conducted a self-administered online survey of residents of Korea, utilizing sample provided by a reputable online sample provider. All surveys were presented in Korean, with the option to view the survey in English. Participants were screened to include only those residents who have traveled internationally for vacation in the last two years or intend to travel internationally for vacation in the next two years.
- This report includes results from the survey, conducted September 16-23, 2021. A total of 305 surveys were collected during this period.
- The margin of error for a sample of 305 is +/- 5.58 percentage points with a 95% confidence level. That is, if all Korean residents in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.58 percentage points.



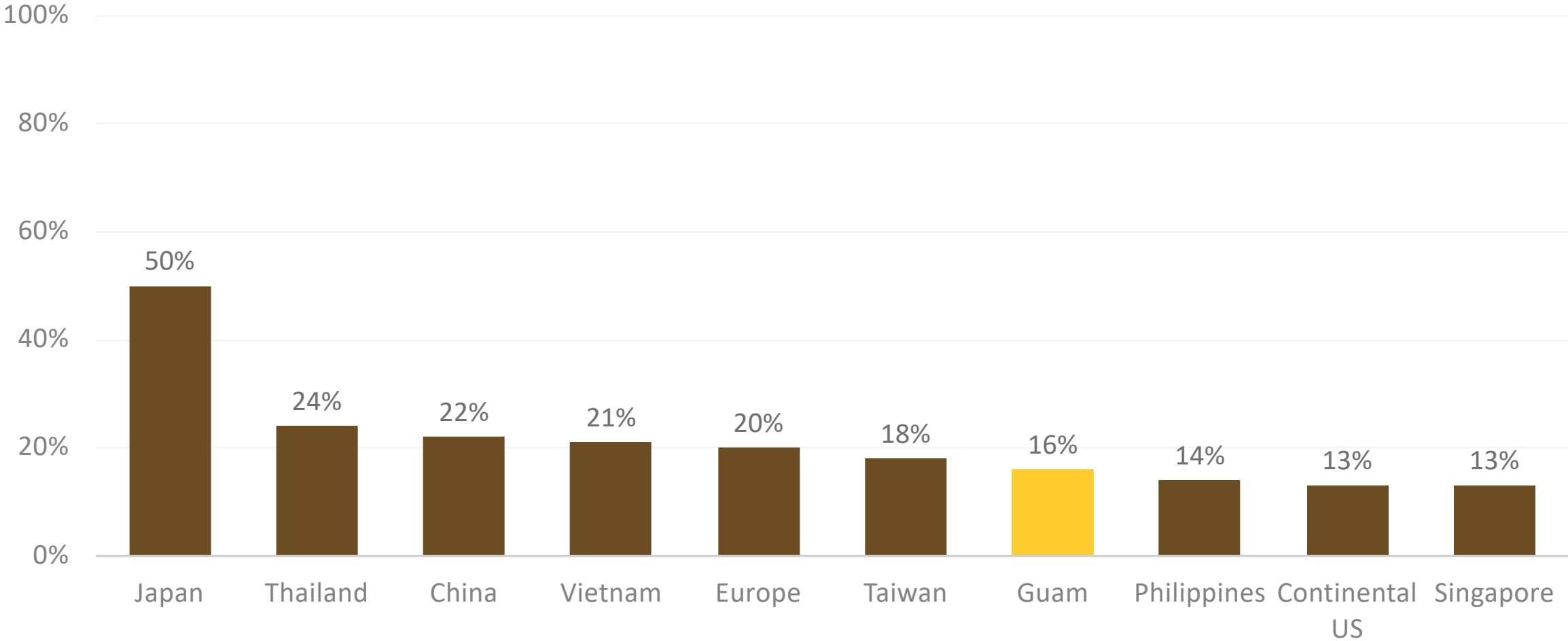


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



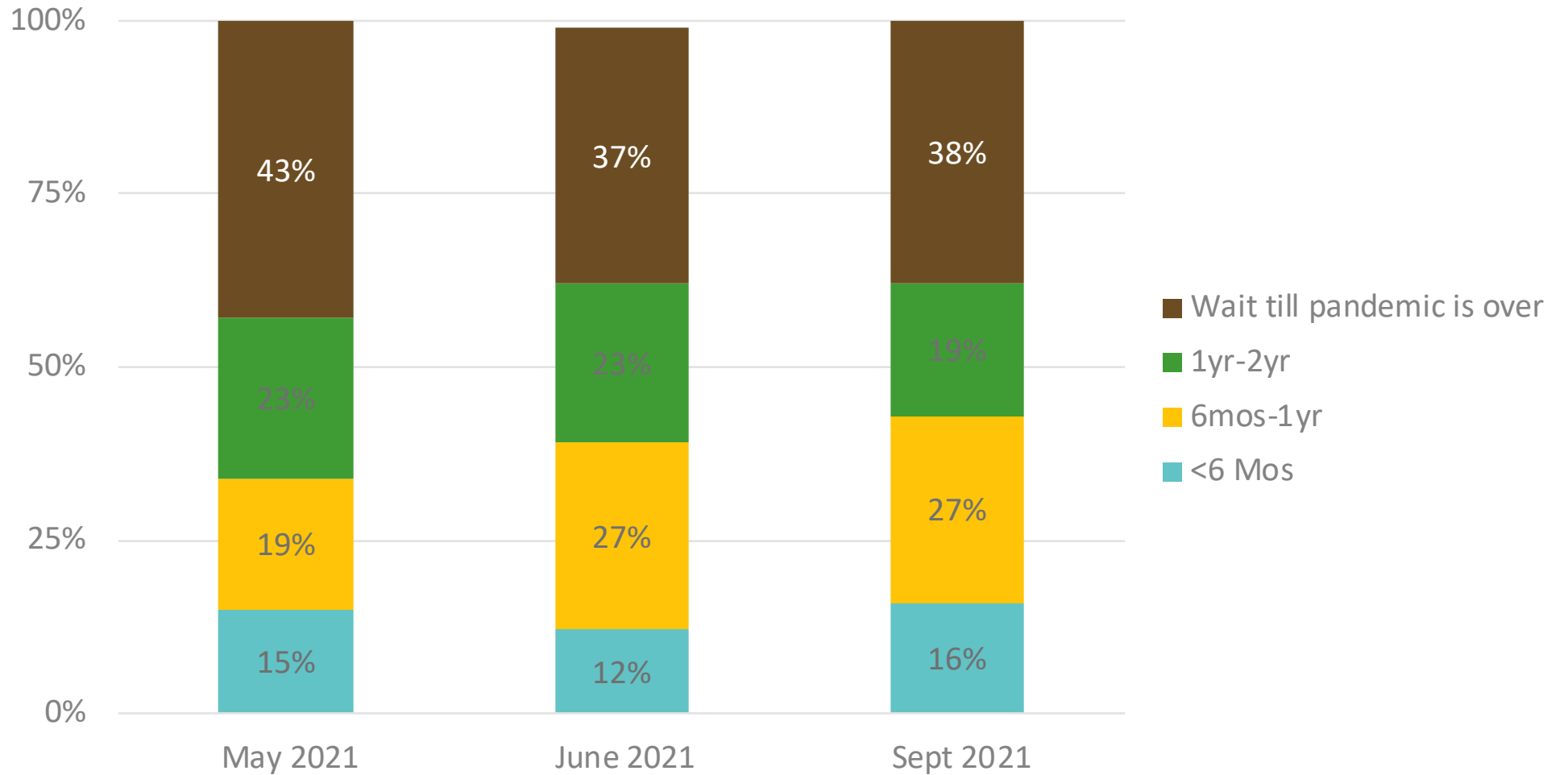
TRAVEL HISTORY – Tracking

	May 2021	June 2021	Sept 2021
Japan	55%	50%	50%
Thailand	20%	16%	24%
China	26%	25%	22%
Vietnam	22%	25%	21%
Europe	25%	20%	20%
Taiwan	18%	13%	18%
Guam	15%	13%	16%
Philippines	12%	11%	14%
Continental U.S.	22%	15%	13%
Singapore	17%	13%	13%
Hawaii	13%	11%	9%

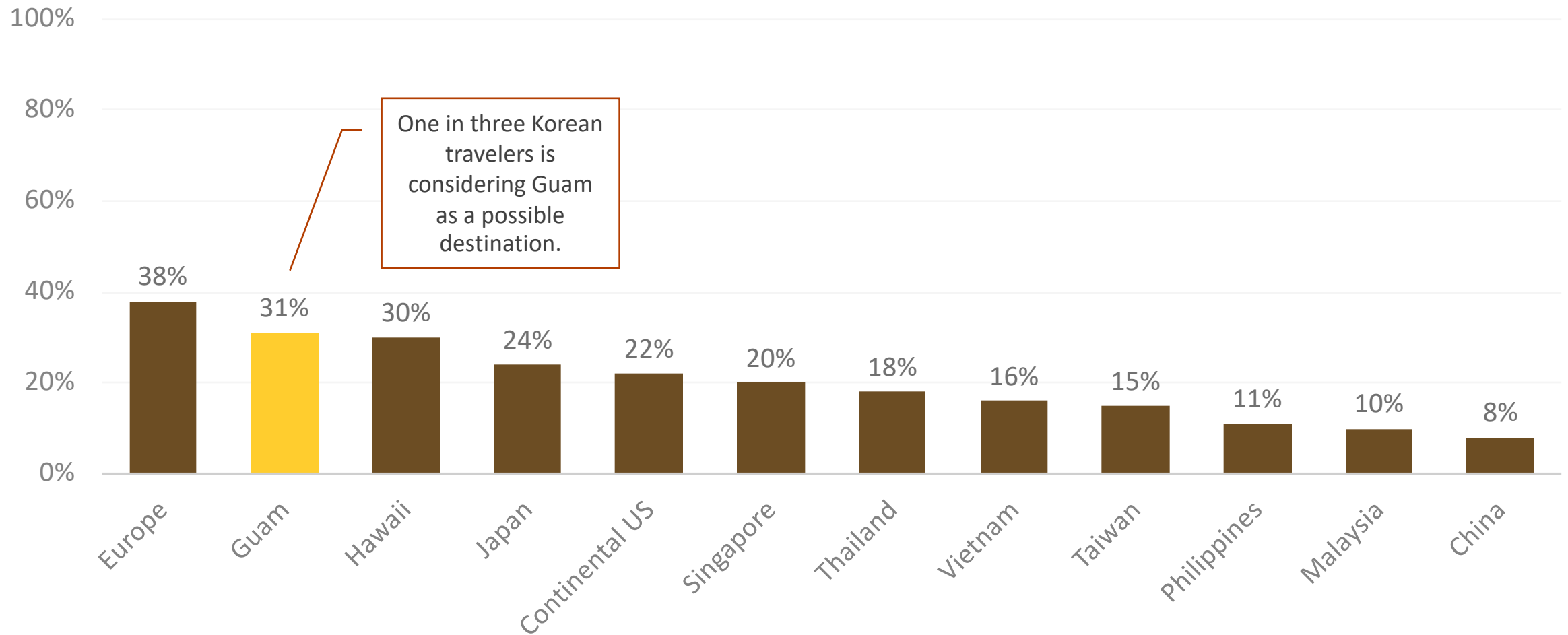


FUTURE TRAVEL PLANS

The proportion of Korean visitors who do not intend to travel internationally until the pandemic is has remained relatively unchanged.



POTENTIAL FUTURE TRAVEL DESTINATIONS



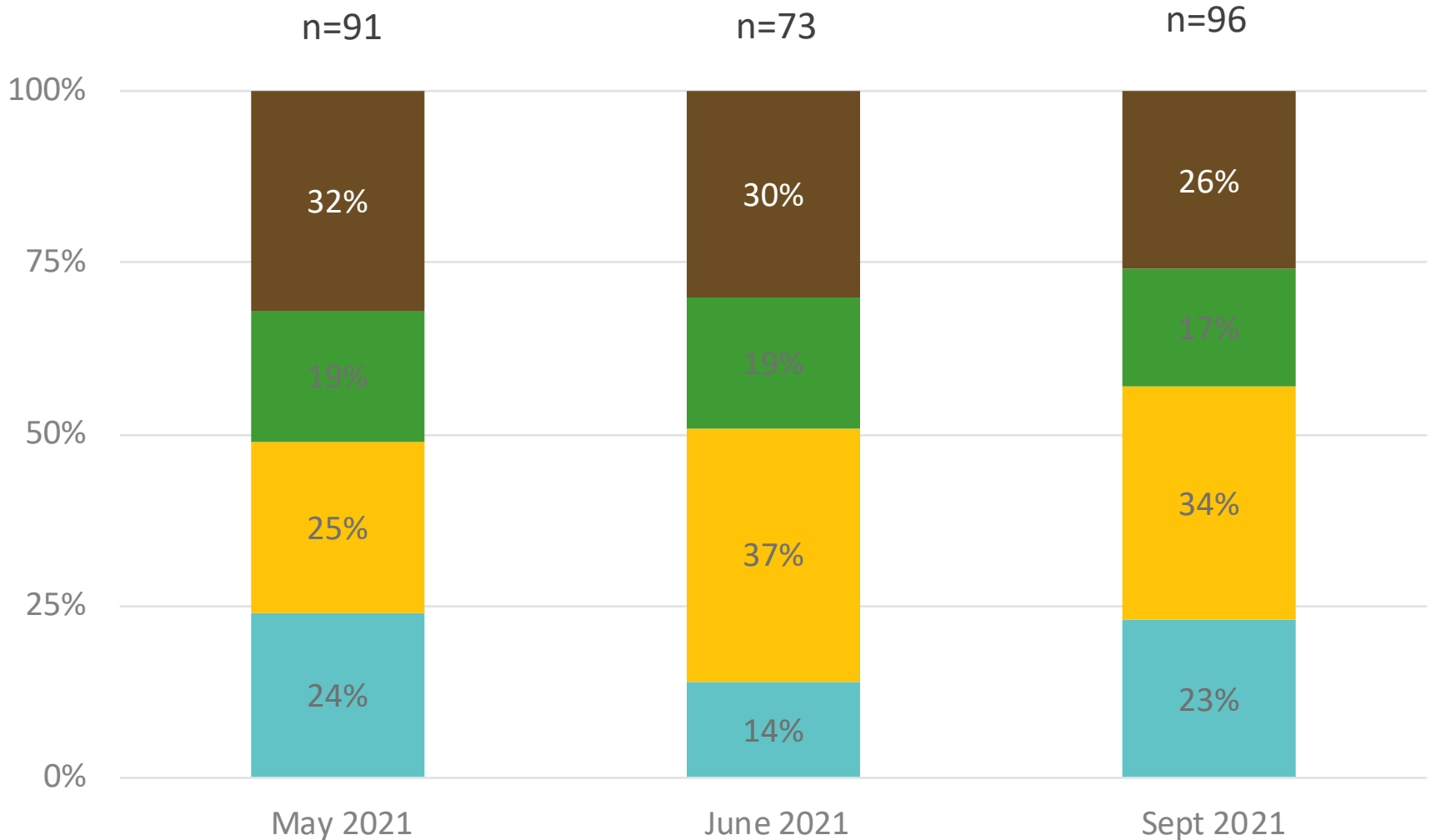
POTENTIAL FUTURE TRAVEL DESTINATIONS

– Tracking

	May 2021	June 2021	Sept 2021
Europe	36%	37%	38%
Guam	30%	24%	31%
Hawaii	35%	27%	30%
Japan	30%	29%	24%
Continental U.S.	30%	23%	22%
Singapore	25%	22%	20%
Thailand	15%	19%	18%
Vietnam	16%	20%	16%
Taiwan	17%	13%	15%
Philippines	9%	11%	11%
China	11%	9%	8%

The proportion of Korean visitors are considering Hawaii and Guam as potential travel destination has rebounded this reporting period.

TIMING OF FUTURE TRAVEL TO GUAM

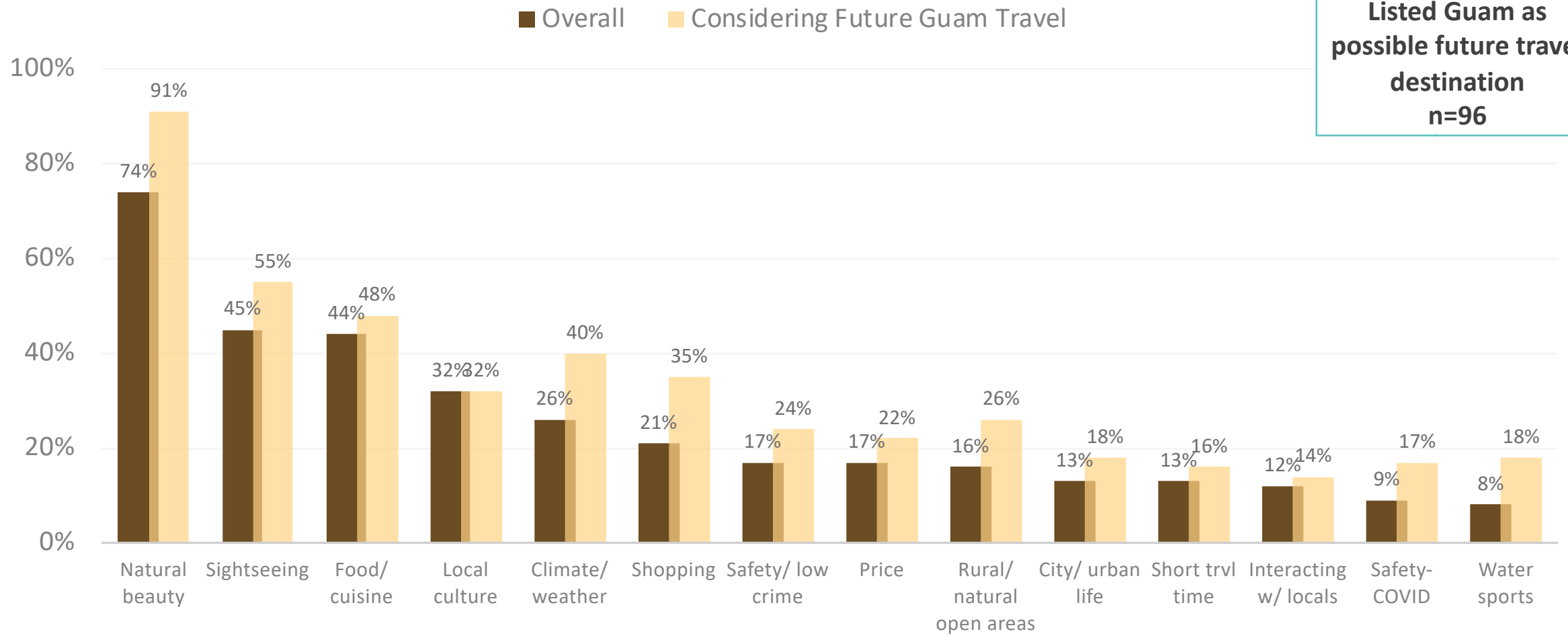


FILTER: Considering Guam as future travel destination

- Wait till pandemic is over
- 1yr-2yr
- 6mos-1yr
- <6 Mos



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

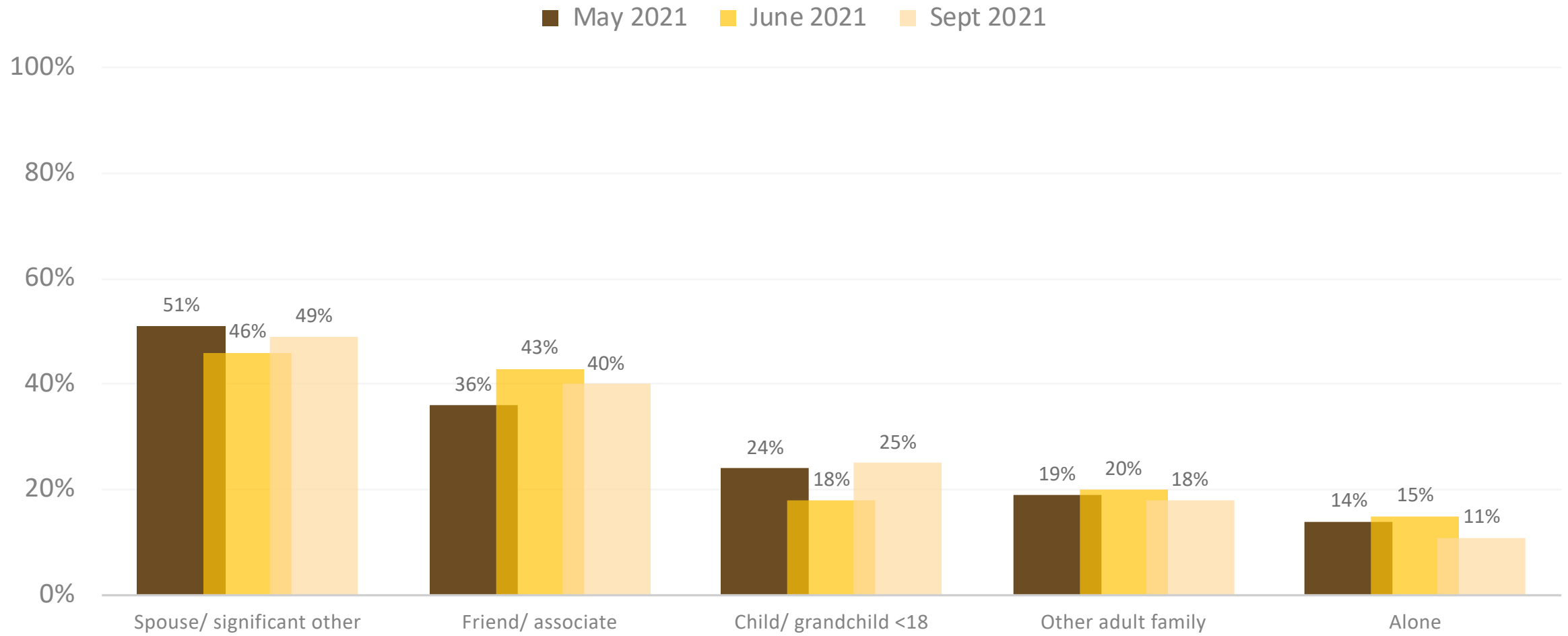


APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS – Tracking

	May 2021	June 2021	Sept 2021
Natural beauty	70%	66%	74%
Sightseeing	48%	49%	45%
Food/ cuisine	50%	44%	44%
Local culture	35%	30%	32%
Climate/ weather	35%	25%	26%
Shopping	26%	24%	21%
Safety- low crime	21%	20%	17%
Price	19%	15%	17%
Rural/ open areas	19%	16%	16%
City/ urban life	17%	15%	13%
Short travel time	18%	14%	13%
Local residents	12%	14%	12%
Covid- safety	17%	14%	9%

The proportion of Korean visitors who factor in COVID safety continues to decline.

FUTURE INTERNATIONAL TRAVEL PARTY



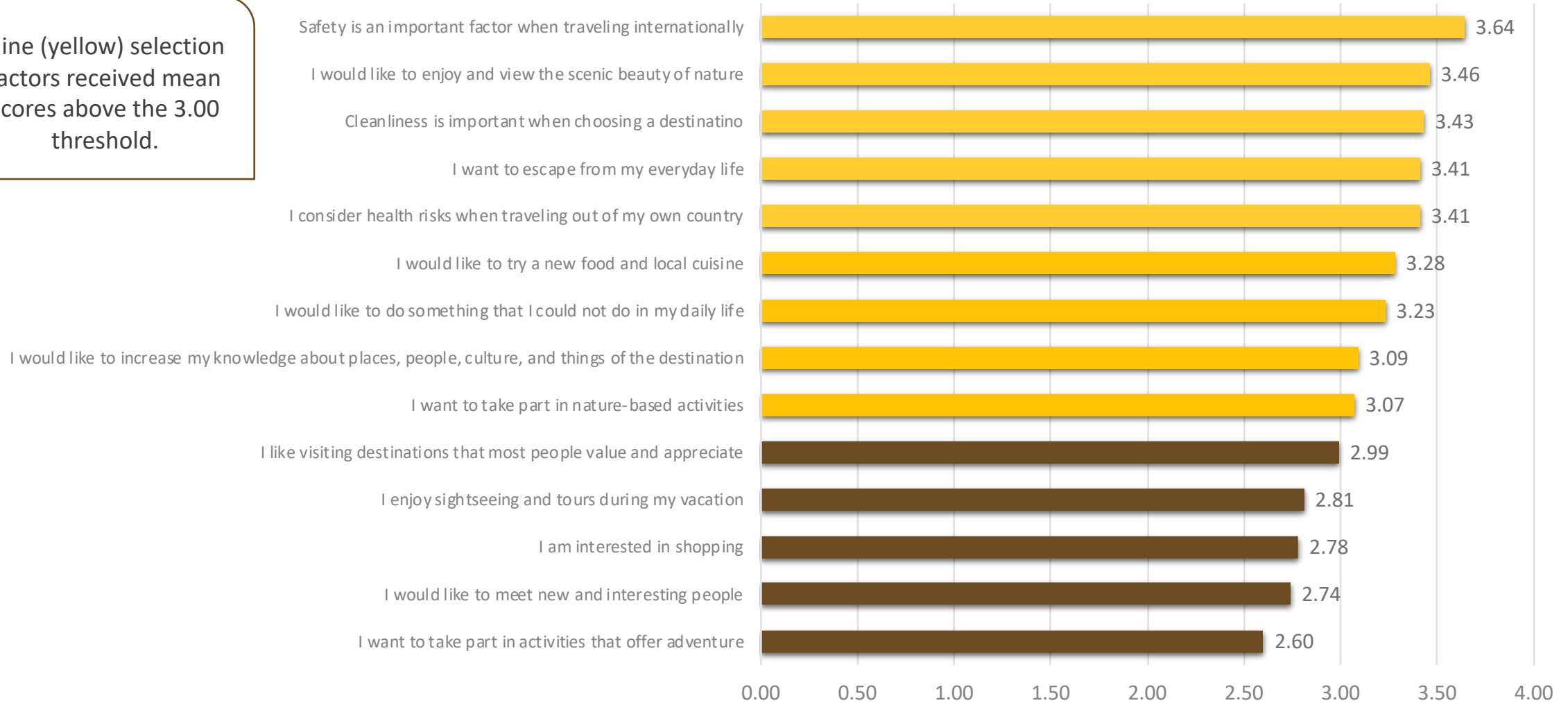
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

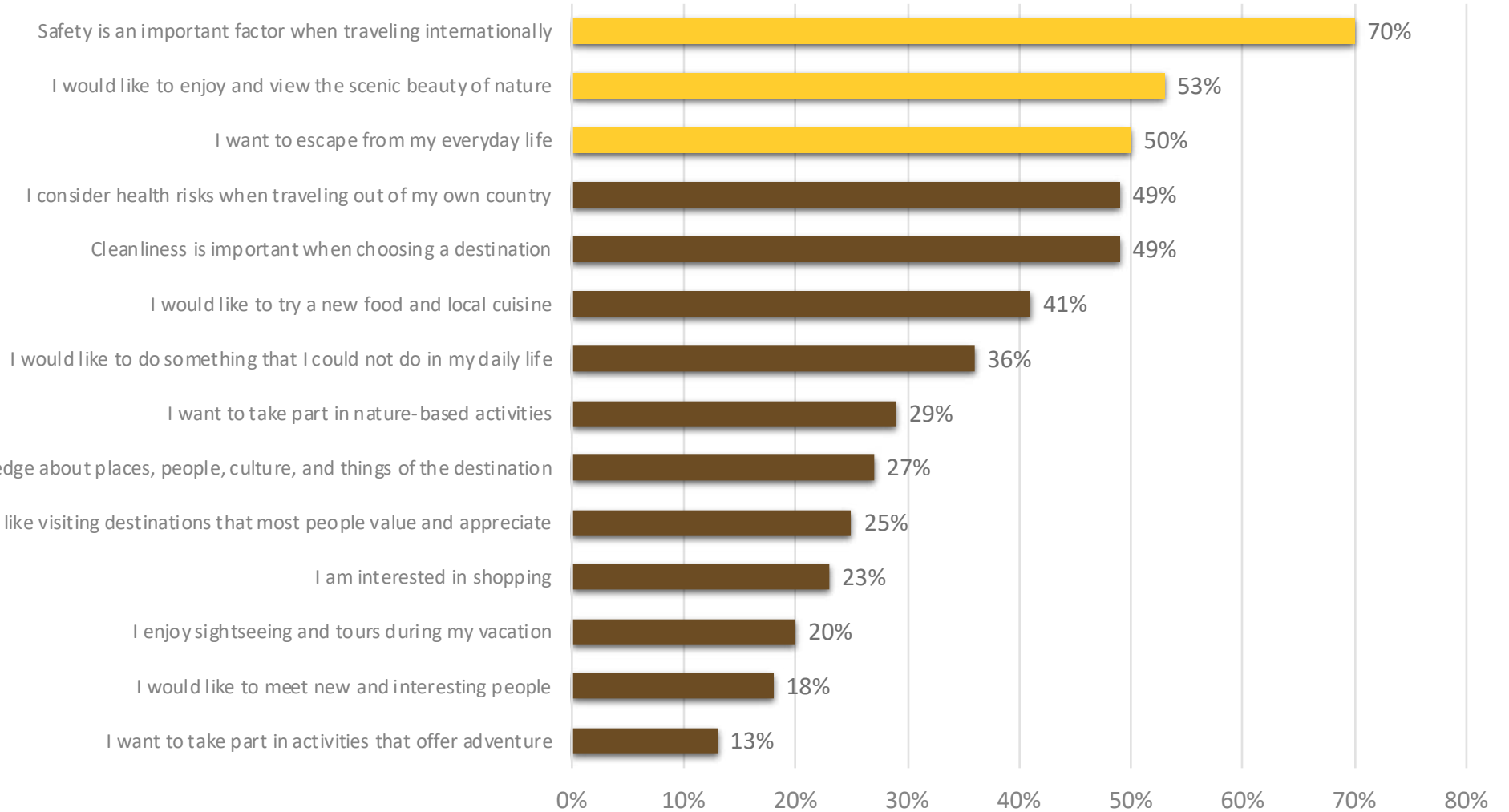
MEAN SCORE 4PT SCALE

Nine (yellow) selection factors received mean scores above the 3.00 threshold.

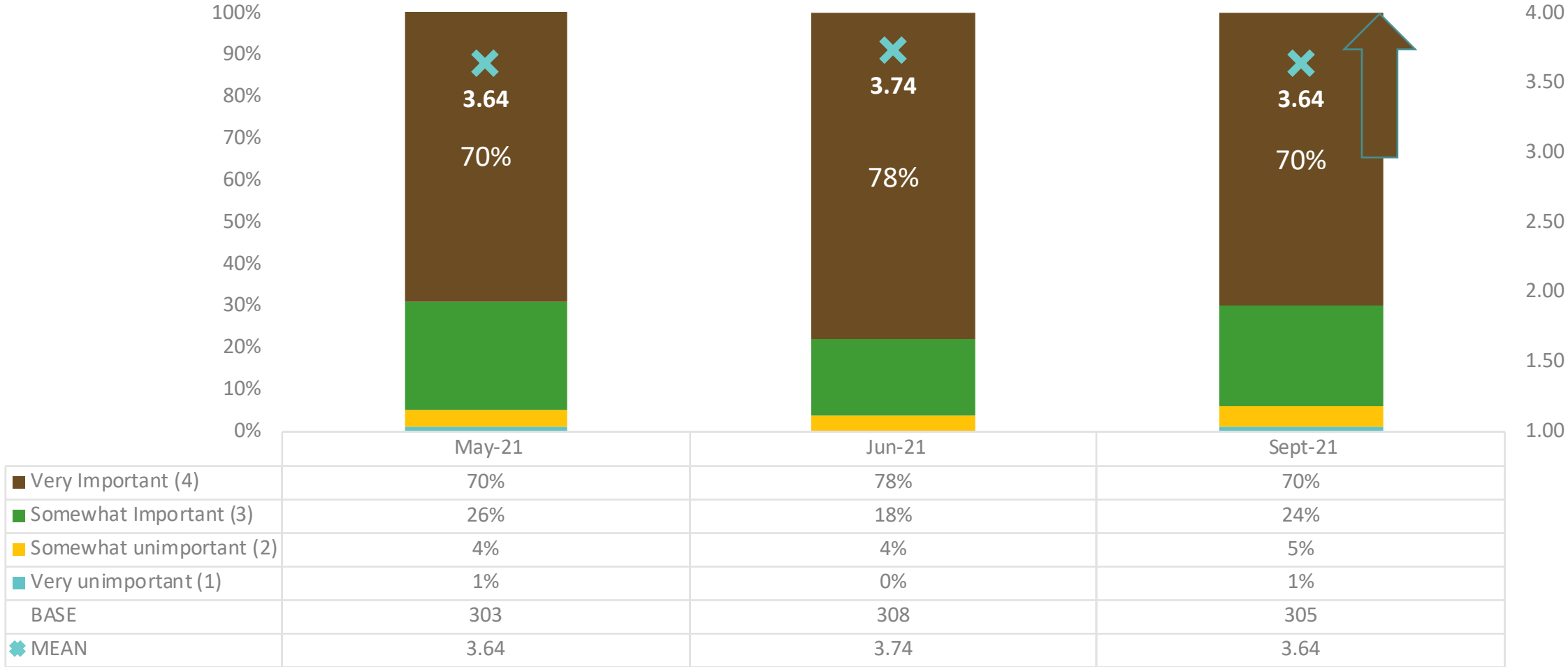


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

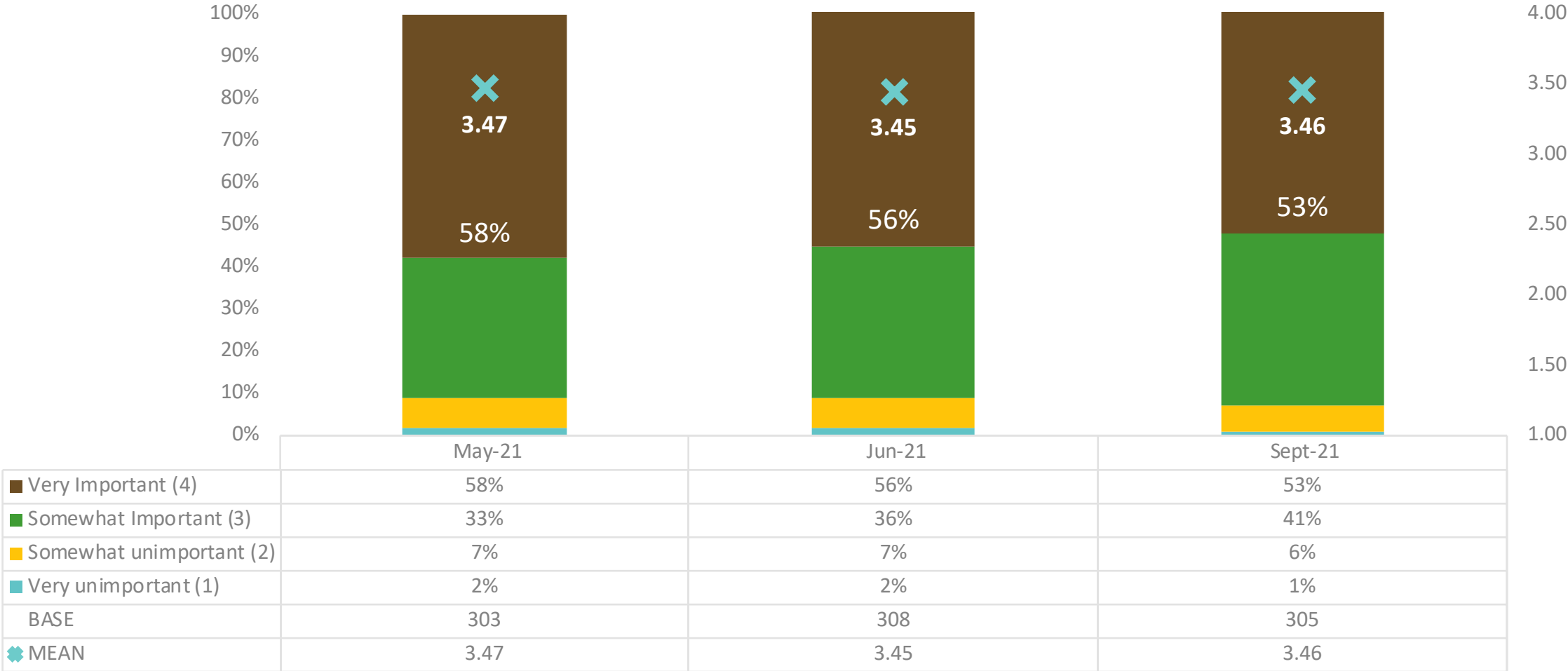
Three (yellow) selection factors received top box (very important) scores above 50%



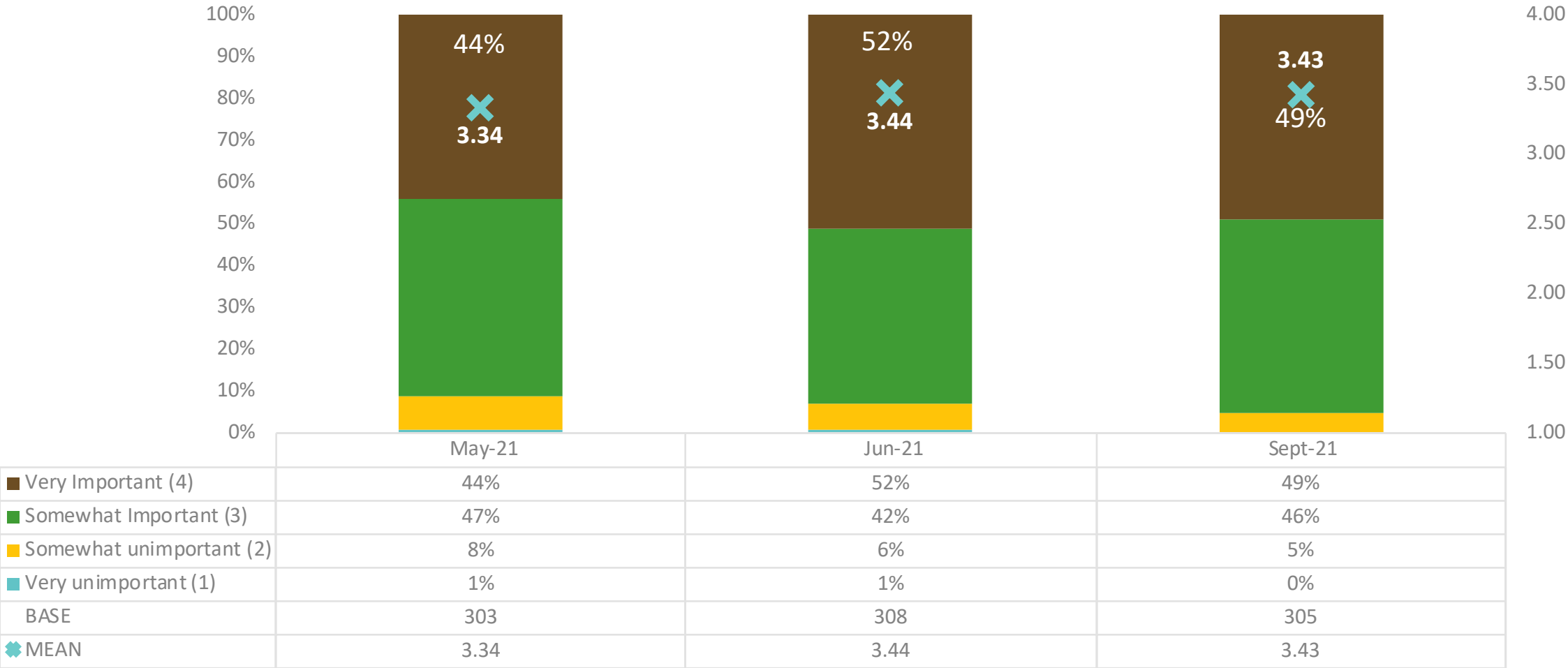
Safety is an important factor when traveling internationally



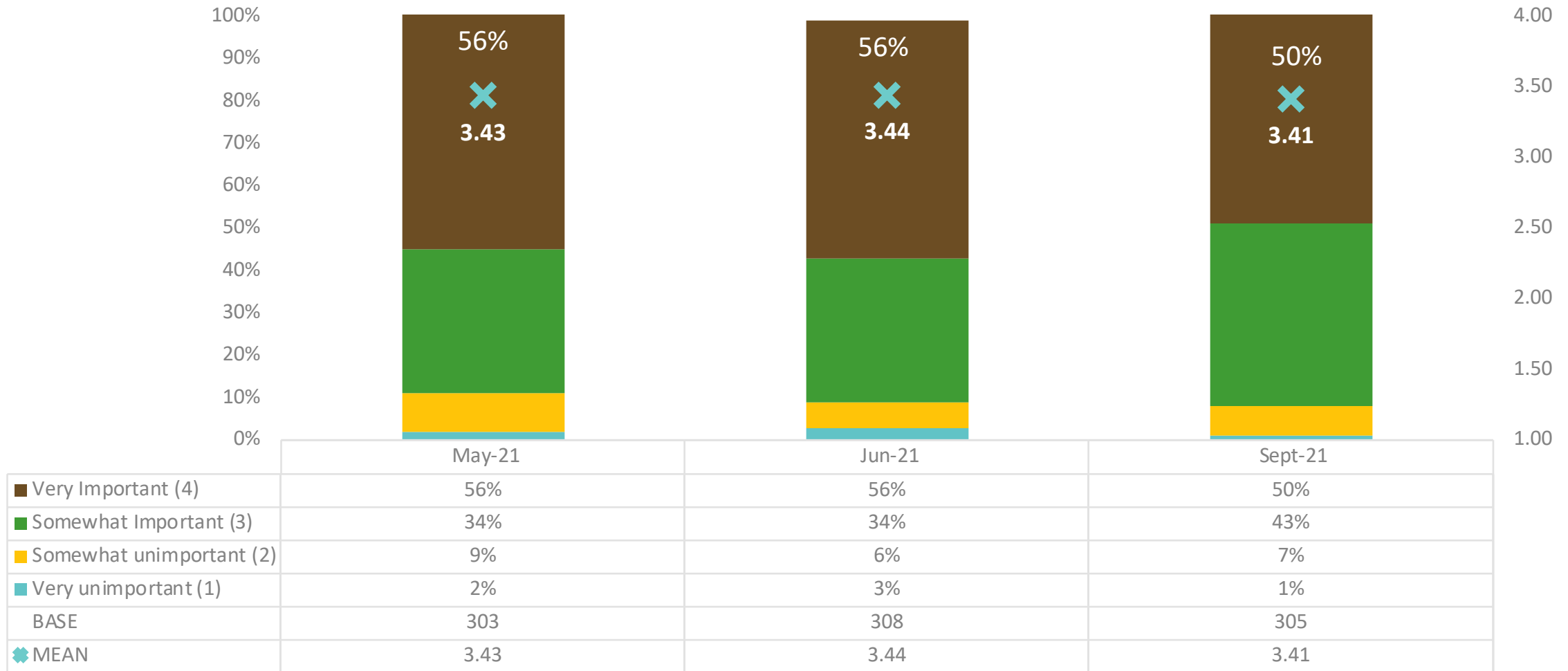
I would like to enjoy and view the scenic beauty of nature



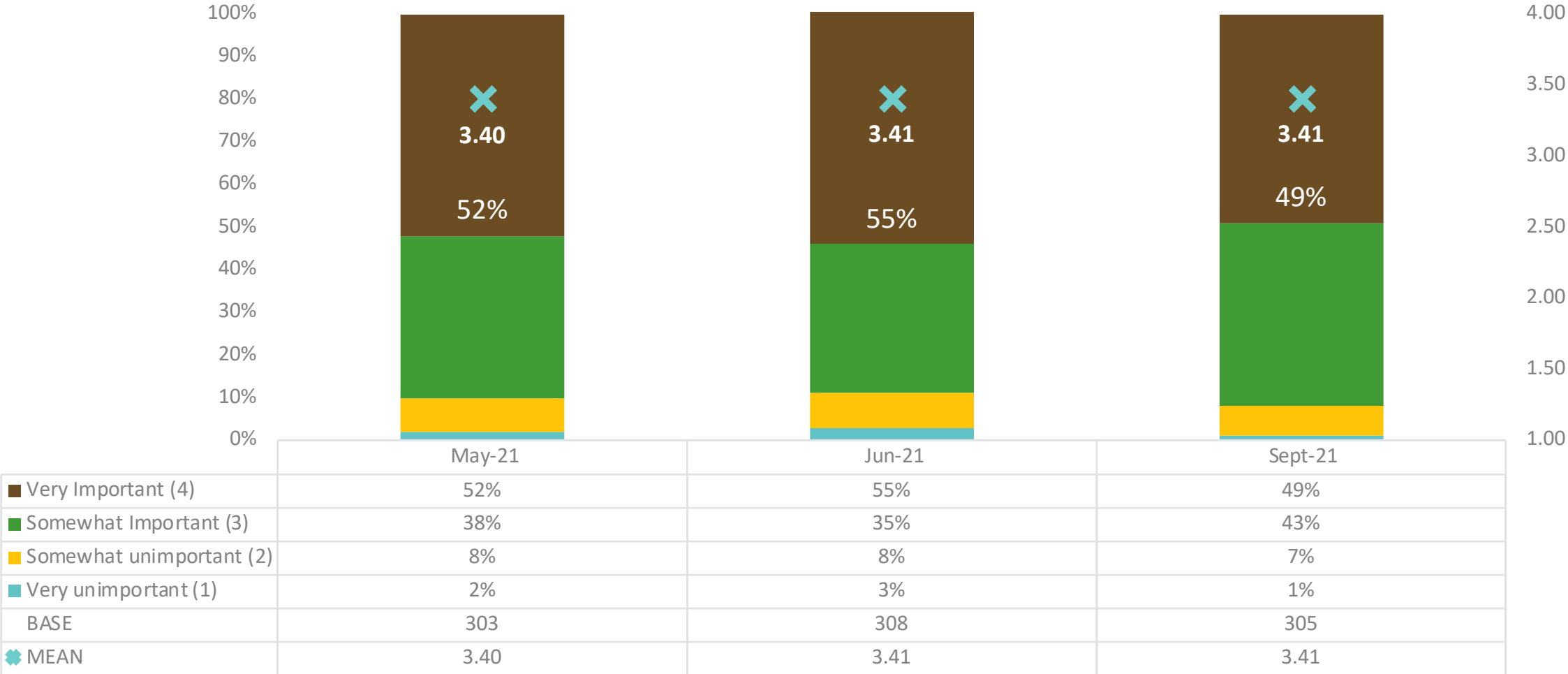
Cleanliness is important when choosing a destination



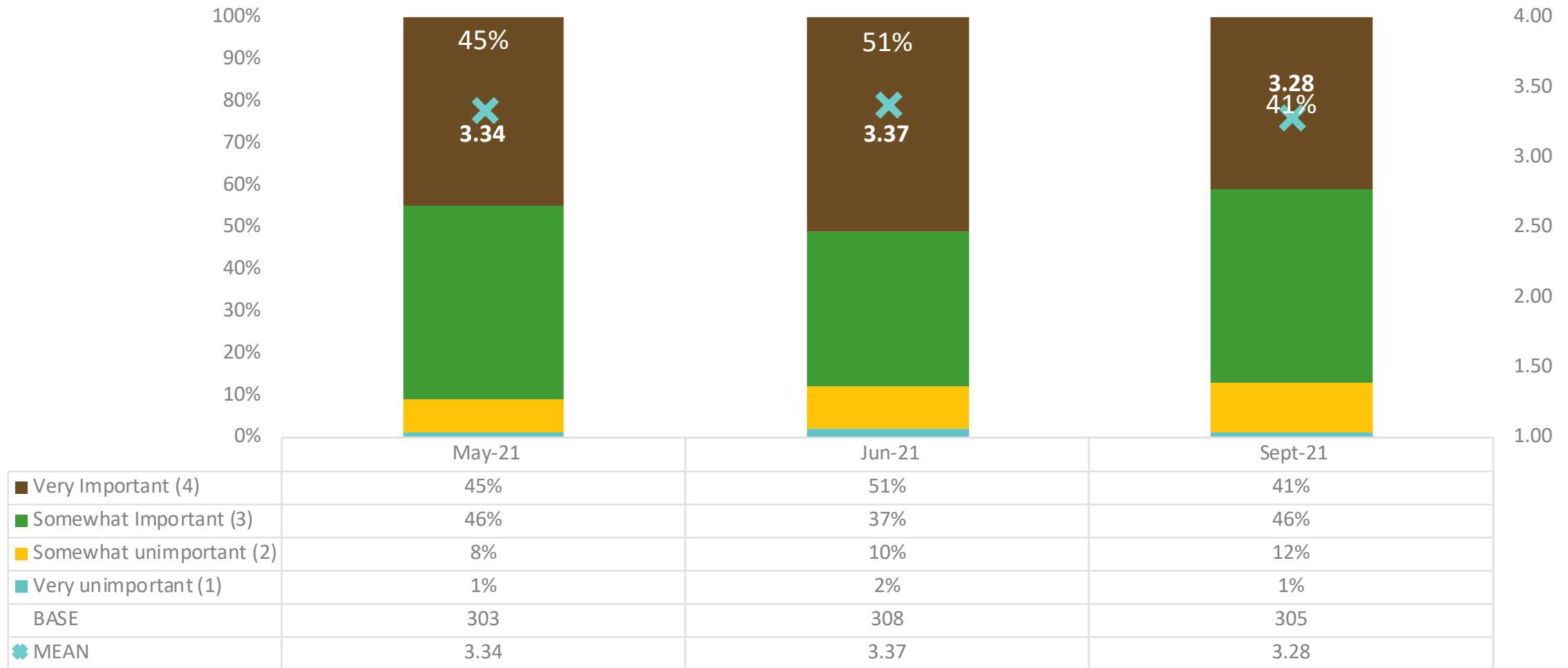
I want to escape my everyday life



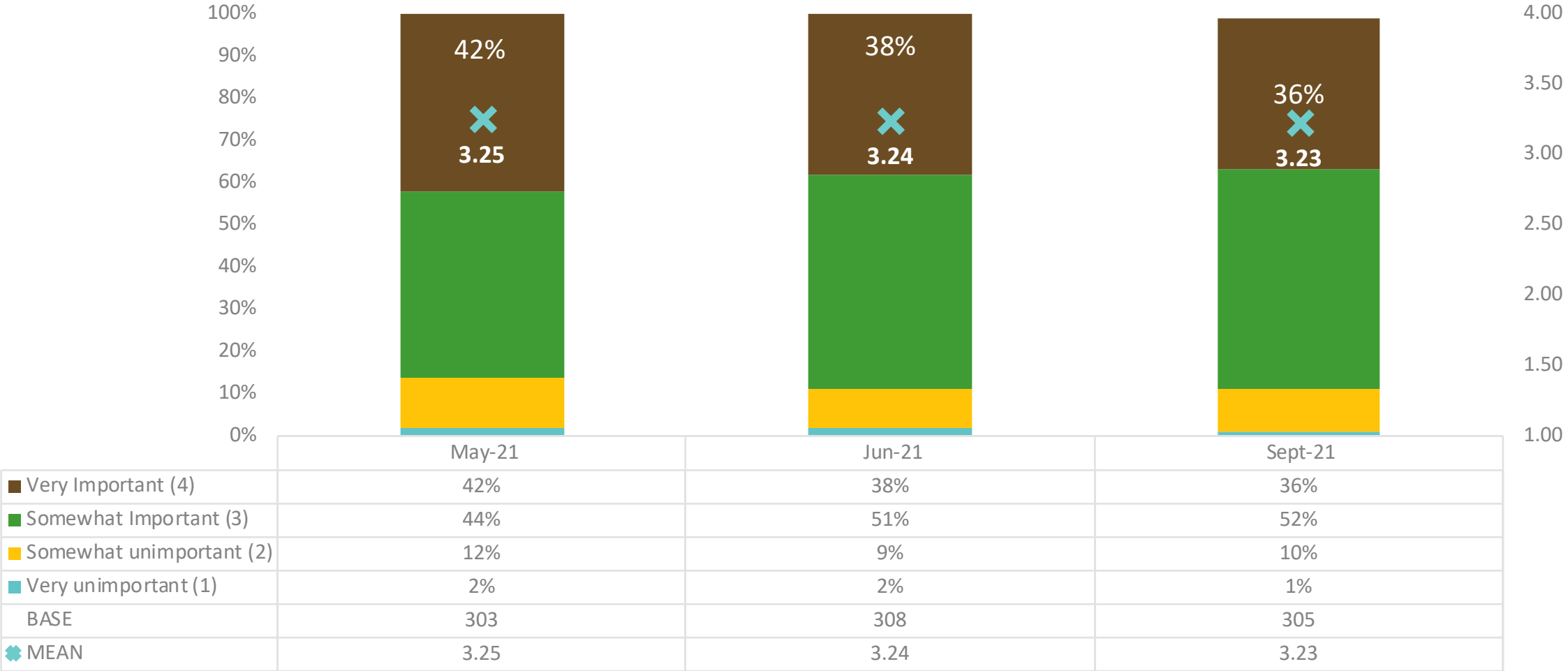
I consider health risks when traveling out of my own country



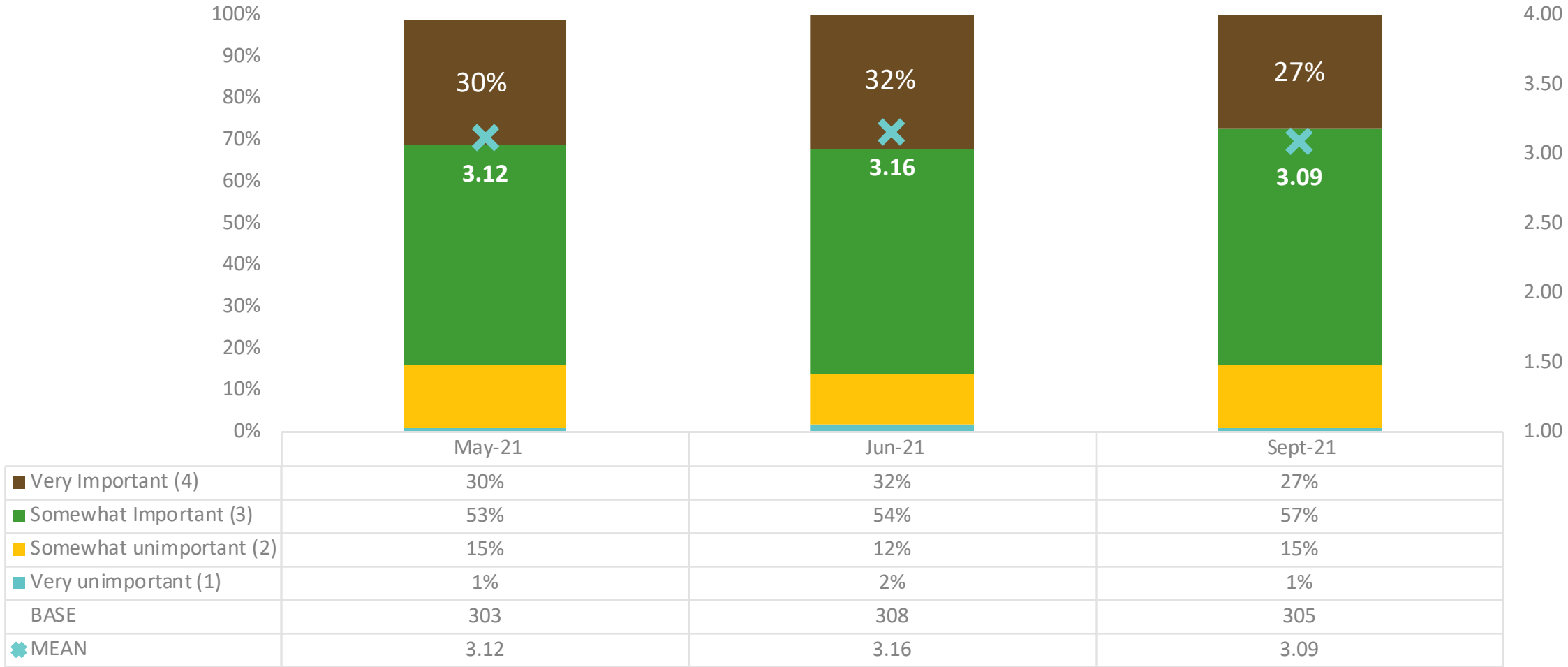
I would like to try a new food and local cuisine



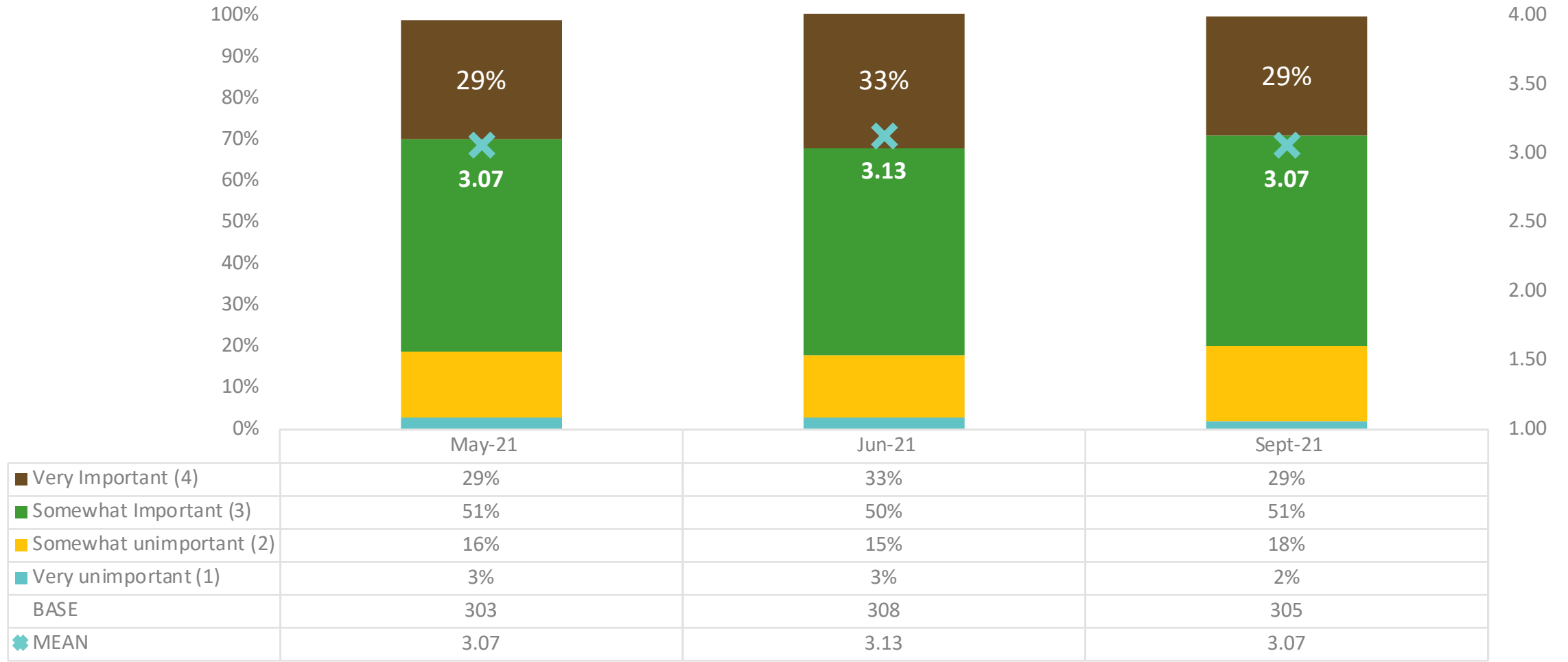
I would like to do something that I could not do in my daily life



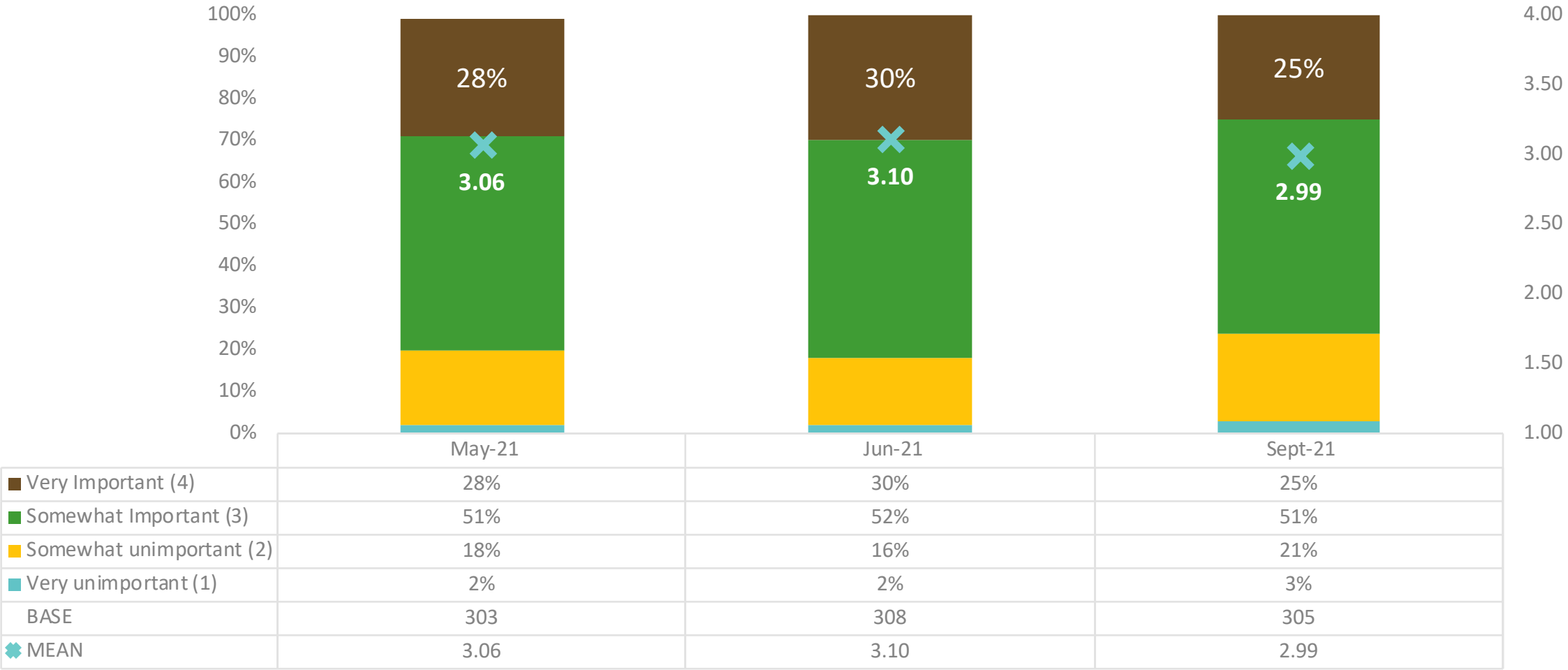
I would like to increase my knowledge about places, people, culture, and things of the destination



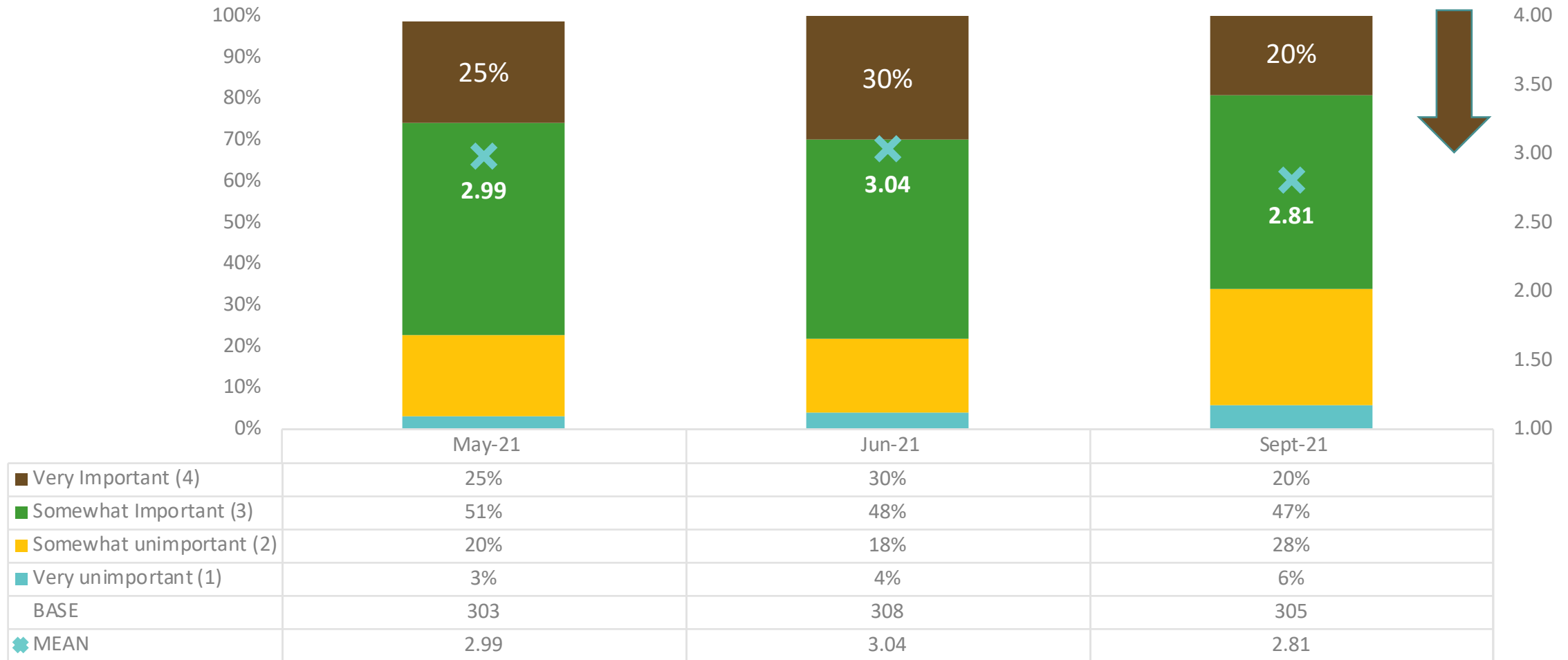
I want to take part in nature-based activities



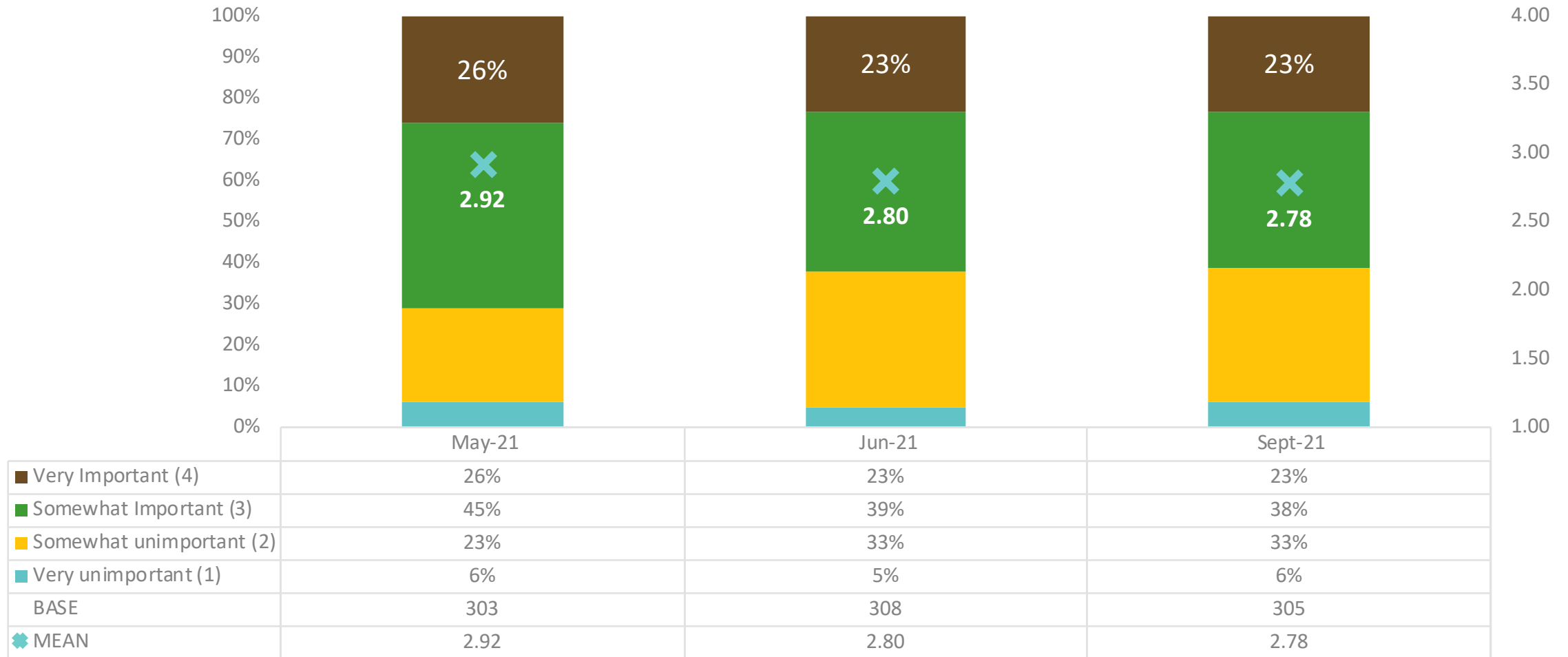
I like visiting destinations that most people value and appreciate



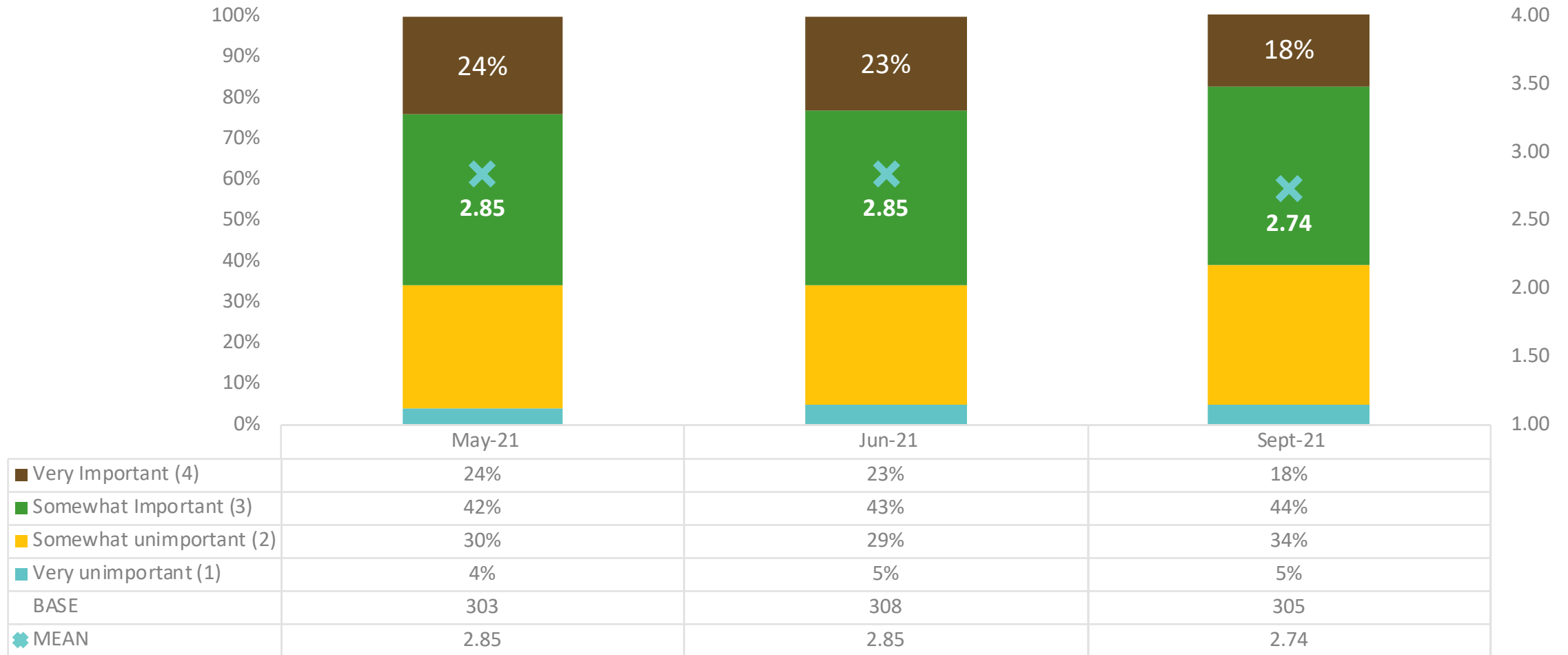
I enjoy sightseeing and tours during my vacation



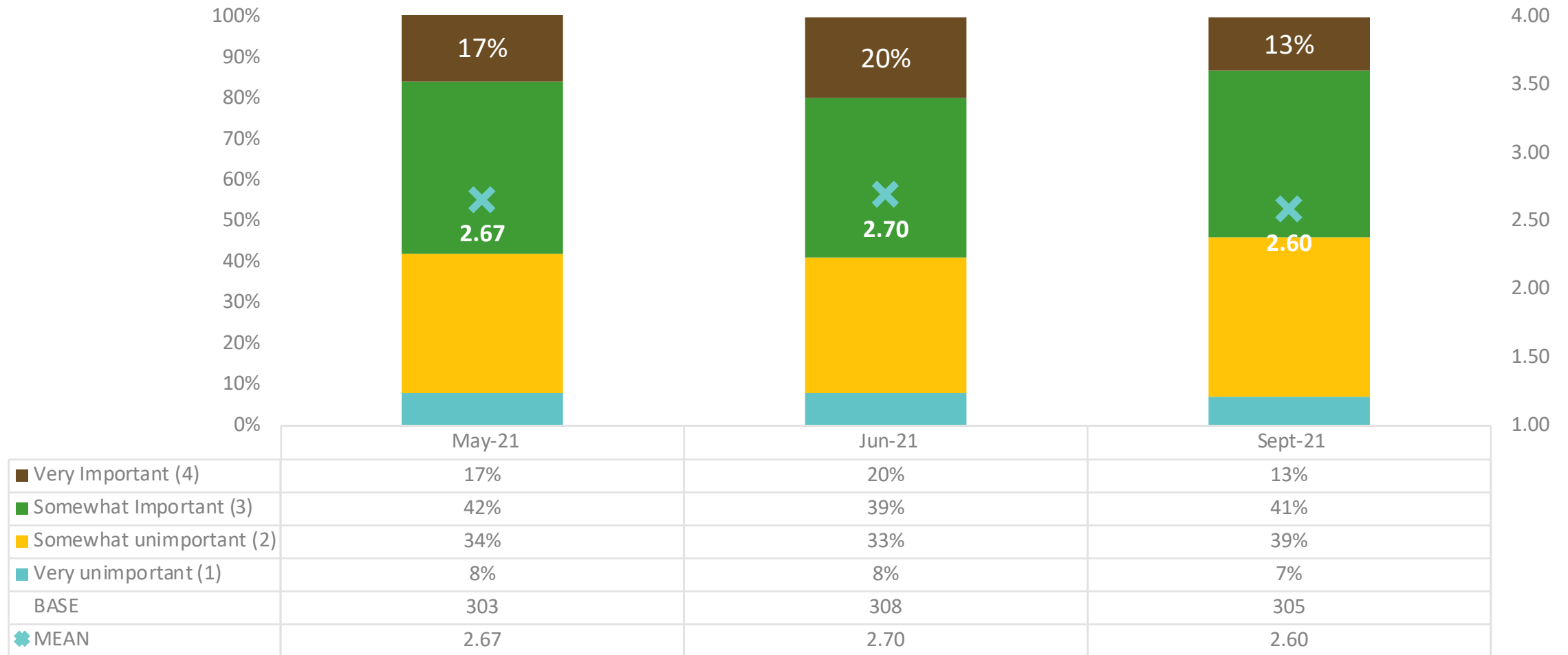
I am interested in shopping



I would like to meet new and interesting people

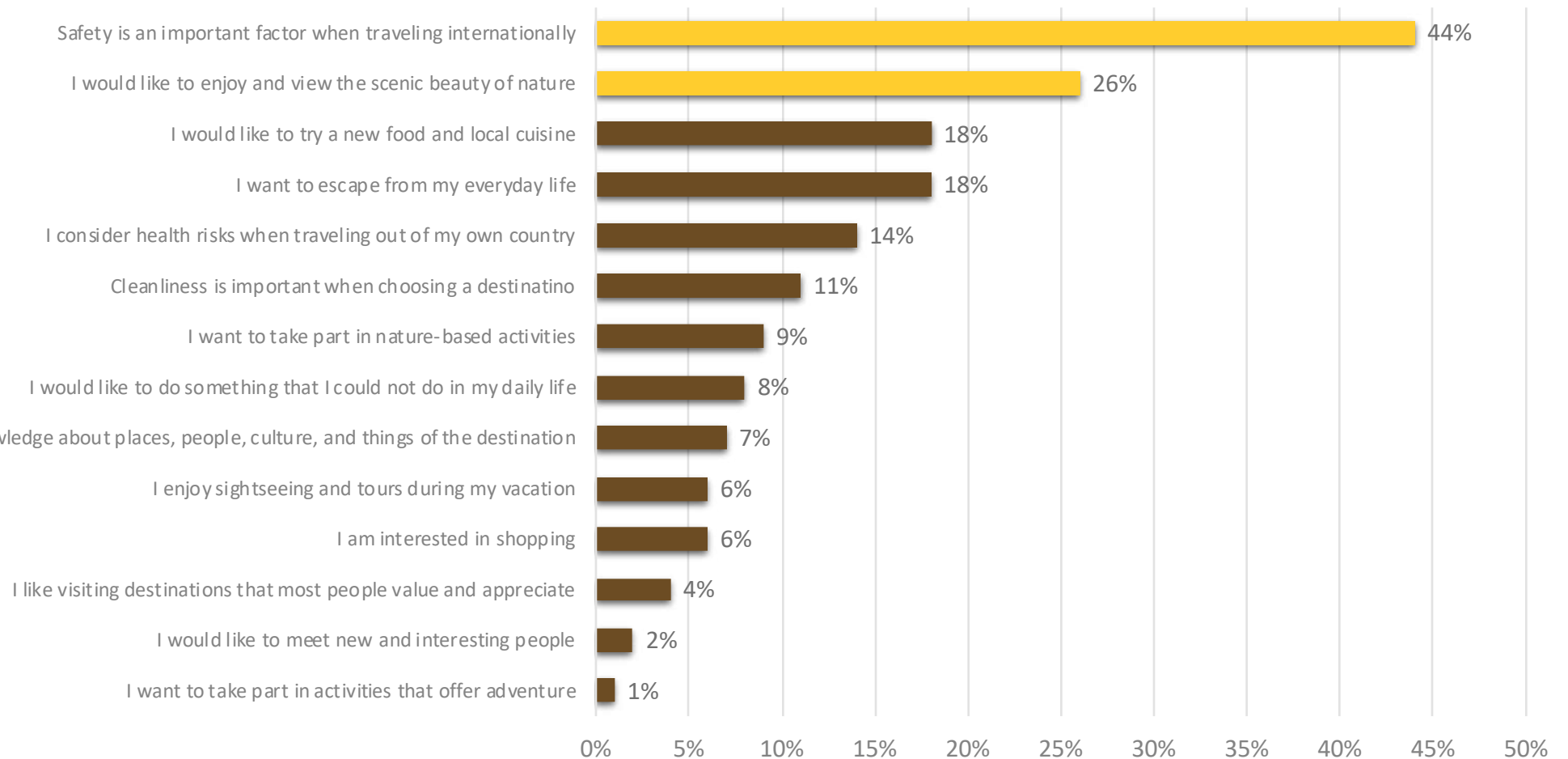


I want to take part in activities that offer adventure



DESTINATION SELECTION FACTORS – TOP TWO

The two most important selection factors were safety and the natural beauty of the destination.



Base
n=282

DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021	Sept 2021
BASE	277	293	282
<i>Safety is an important factor when travelling internationally</i>	41%	43%	44%
<i>I would like to enjoy and view the scenic beauty of nature</i>	32%	26%	26%
<i>I want to escape from my everyday life</i>	20%	19%	18%
<i>I would like to try a new food and local cuisine</i>	18%	20%	18%
<i>I consider health risks when travelling out of my own country</i>	14%	15%	14%
<i>Cleanliness is important when choosing a destination</i>	7%	11%	11%
<i>I want to take part in nature-based activities</i>	3%	4%	9%
<i>I would like to do something that I could not do in my daily life</i>	10%	10%	8%
<i>I would like to increase my knowledge about places, people, culture, and things of the destination</i>	8%	4%	7%
<i>I am interested in shopping</i>	8%	5%	6%
<i>I enjoy sightseeing and tours during my vacation</i>	5%	8%	6%
<i>I like visiting destinations that most people value and appreciate</i>	5%	3%	4%
<i>I would like to meet new and interesting people</i>	3%	6%	2%
<i>I want to take part in activities that offer adventure</i>	2%	2%	1%



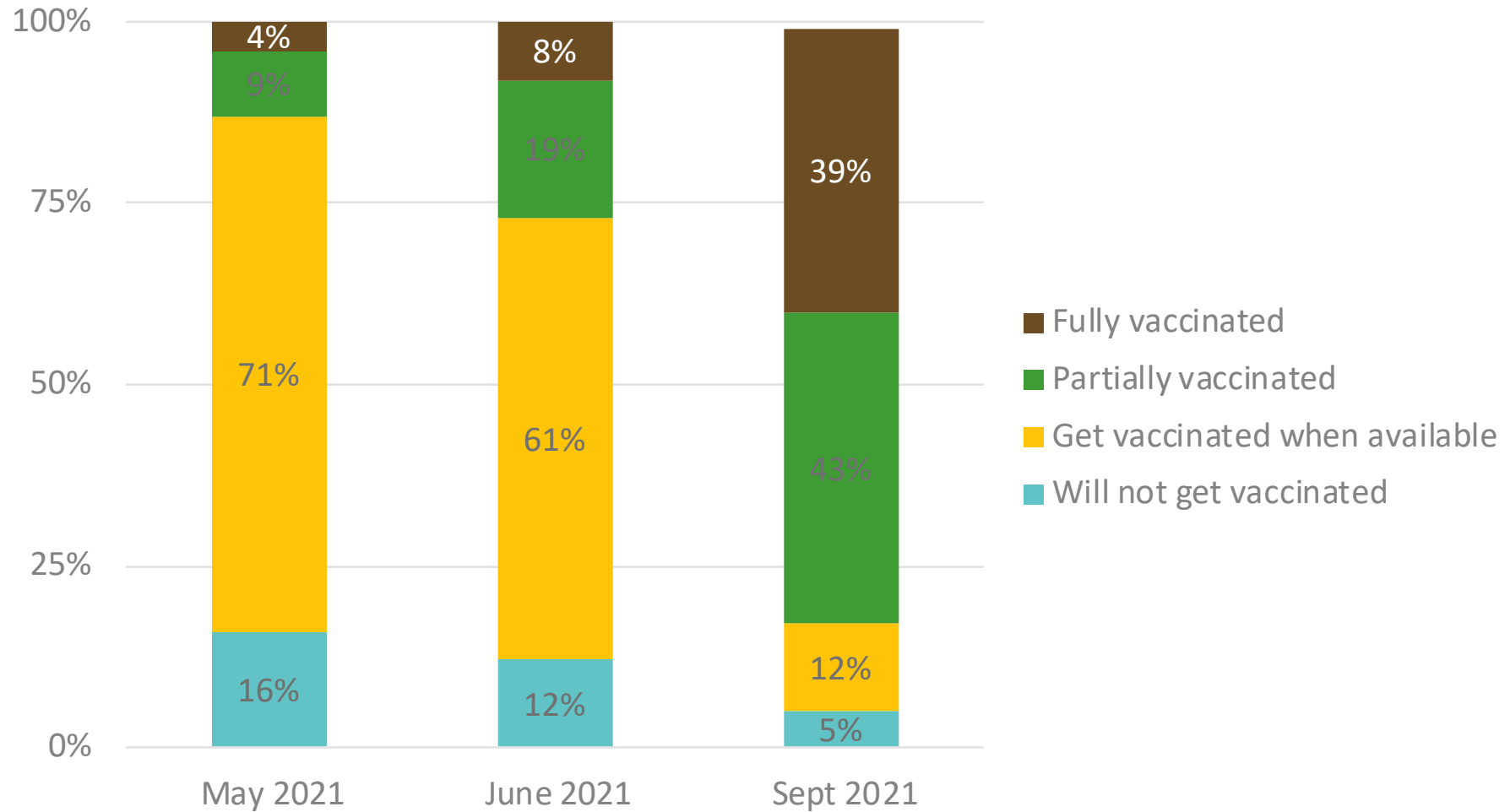
SECTION 2

COVID-19



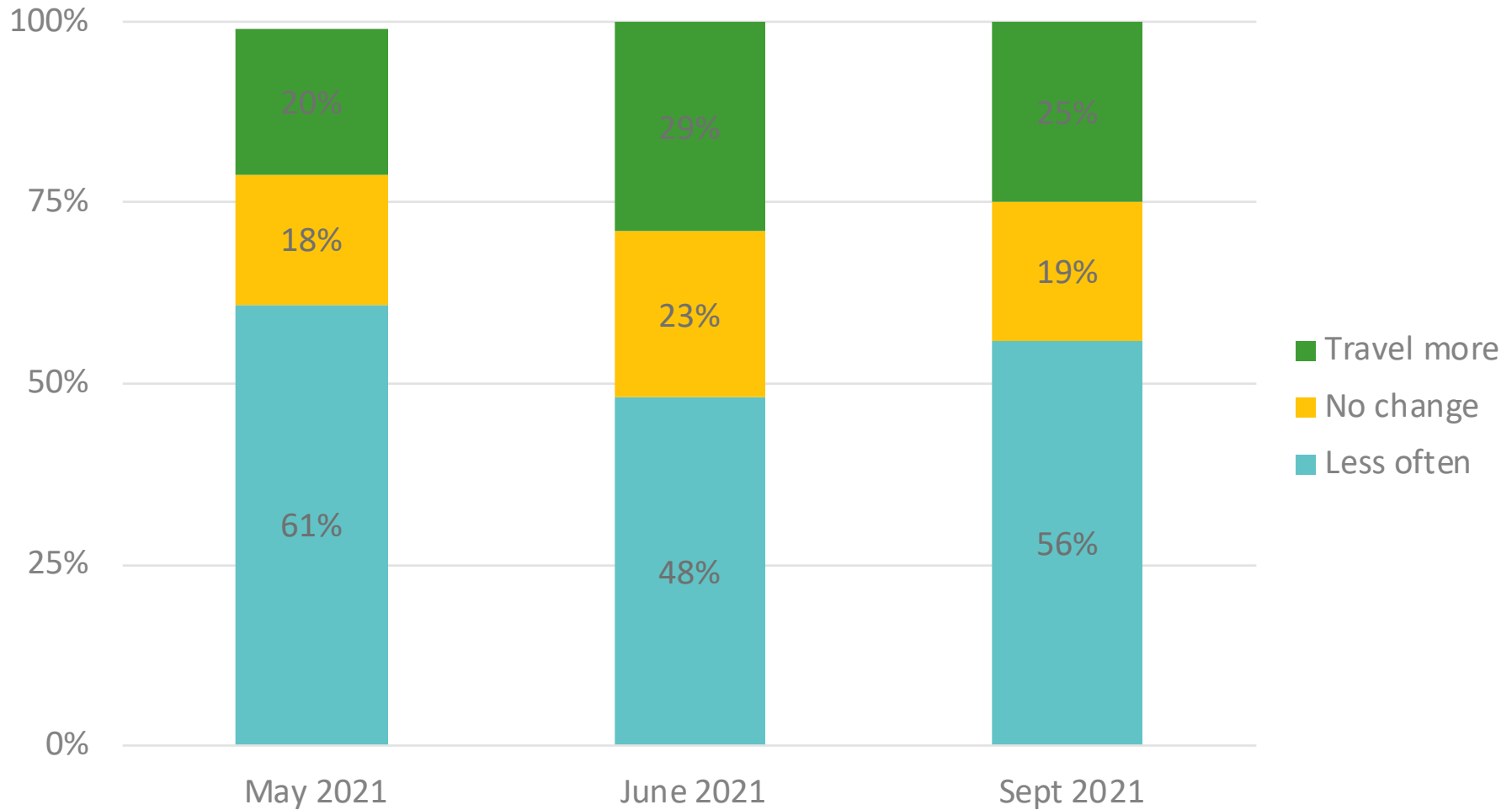
COVID-19 VACCINE STATUS

The proportion of respondents who are vaccinated has increased significantly since the start of the study.



POST-COVID TRAVEL

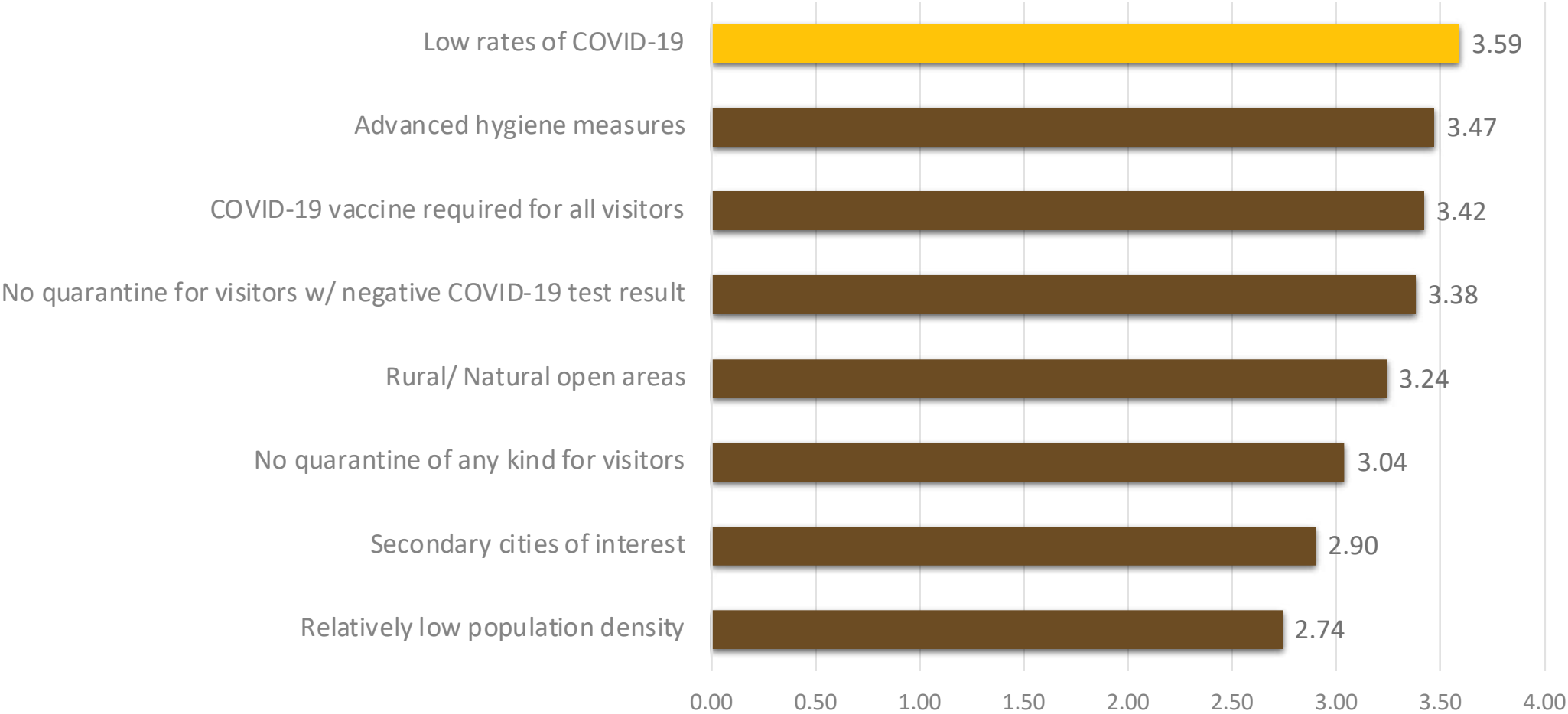
The proportion of Korean visitors who say they intend to travel less often continues to be fairly high.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

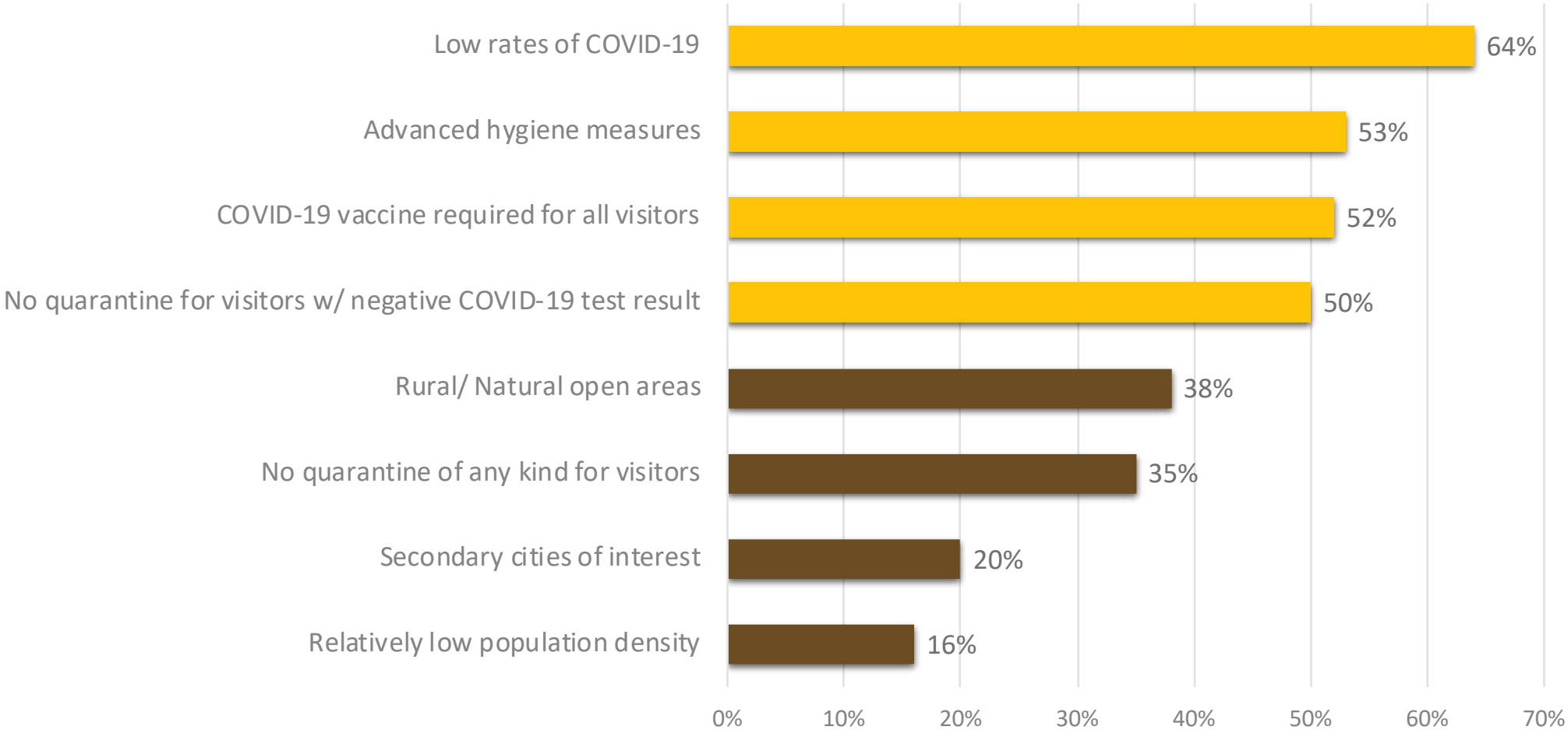
One (yellow) selection factors received mean scores above the 3.50 threshold.



POST-COVID TRAVEL – IMPORTANCE

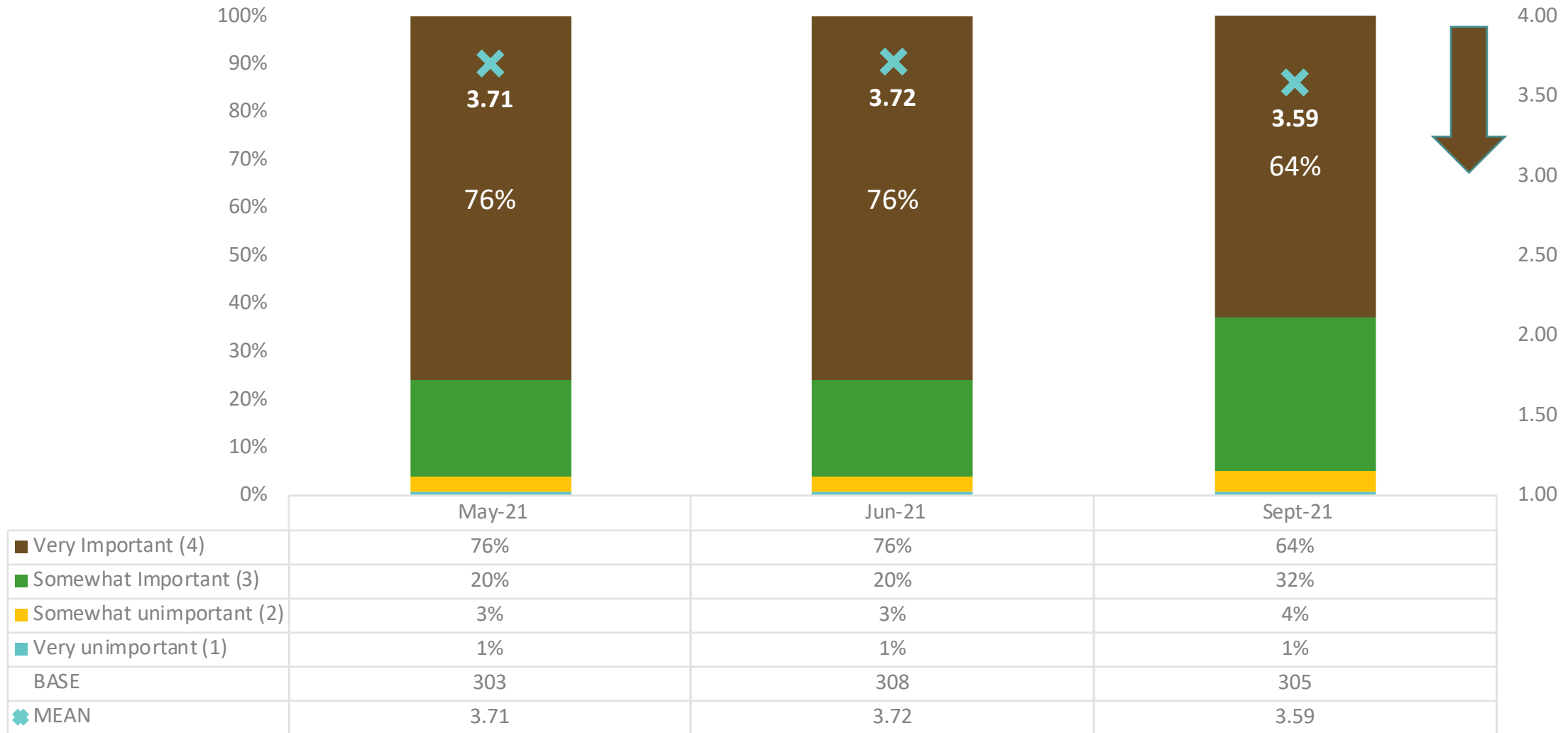
4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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



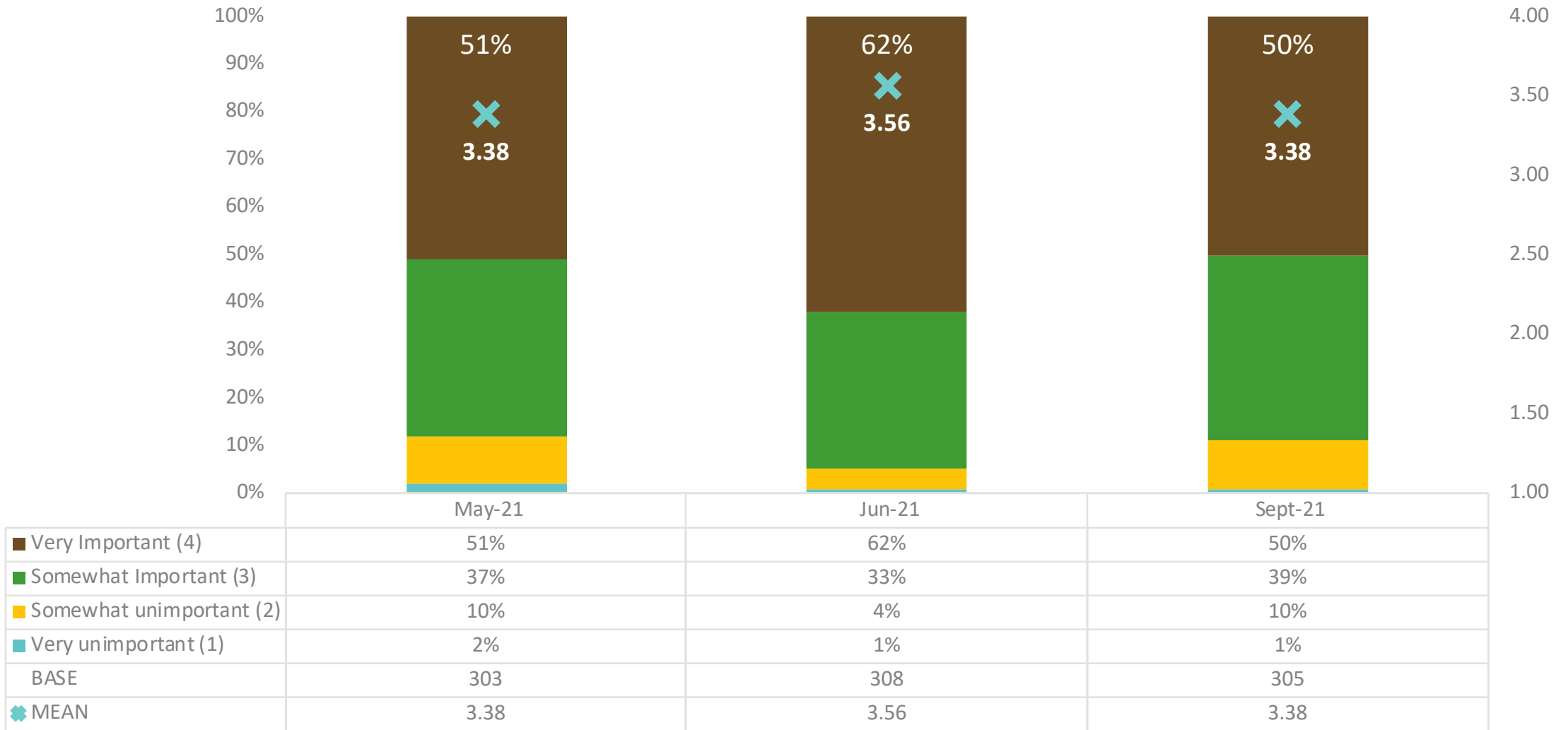
POST-COVID SELECTION FACTOR

Low rates of COVID-19



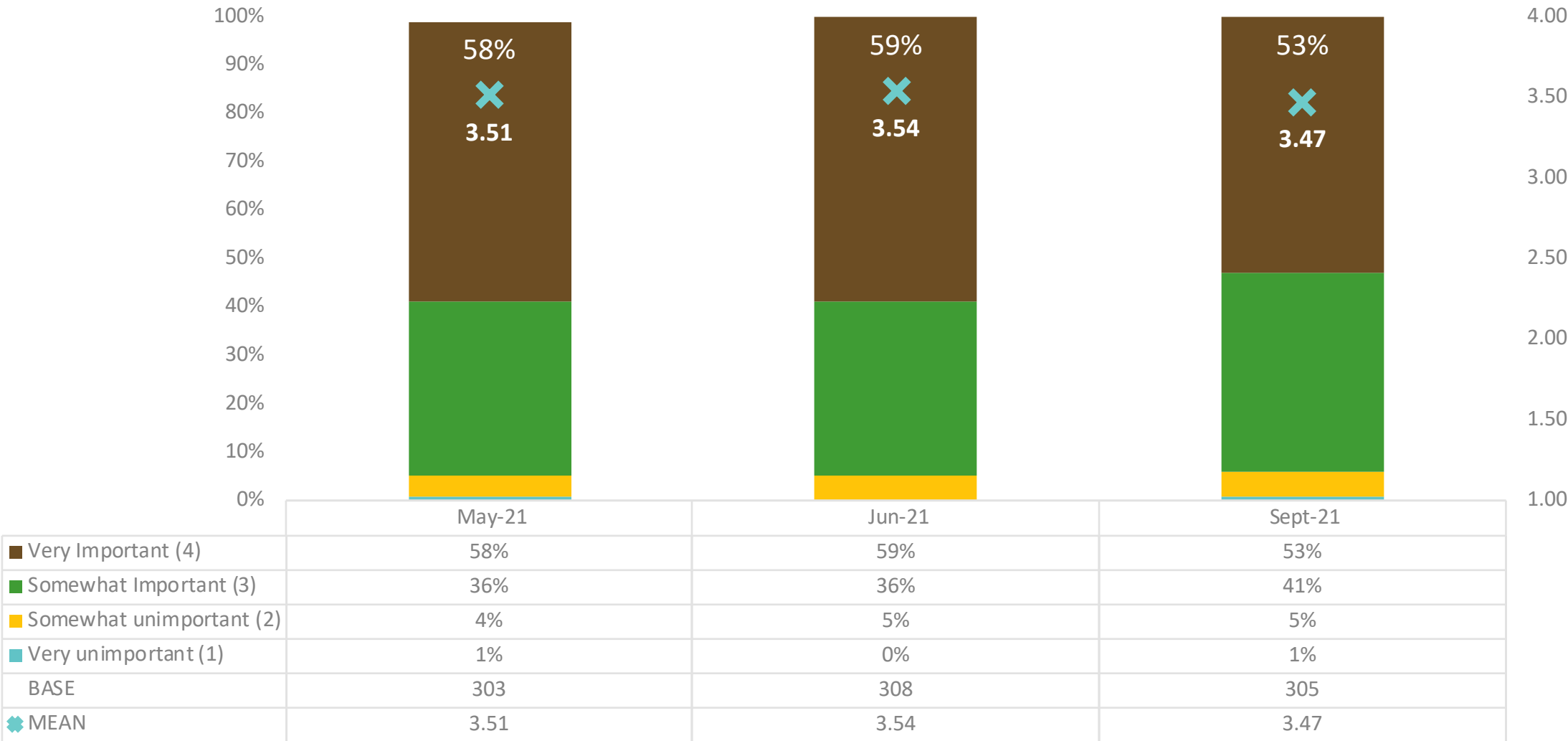
POST-COVID SELECTION FACTOR

No quarantine for visitors w/ negative COVID-19 test results



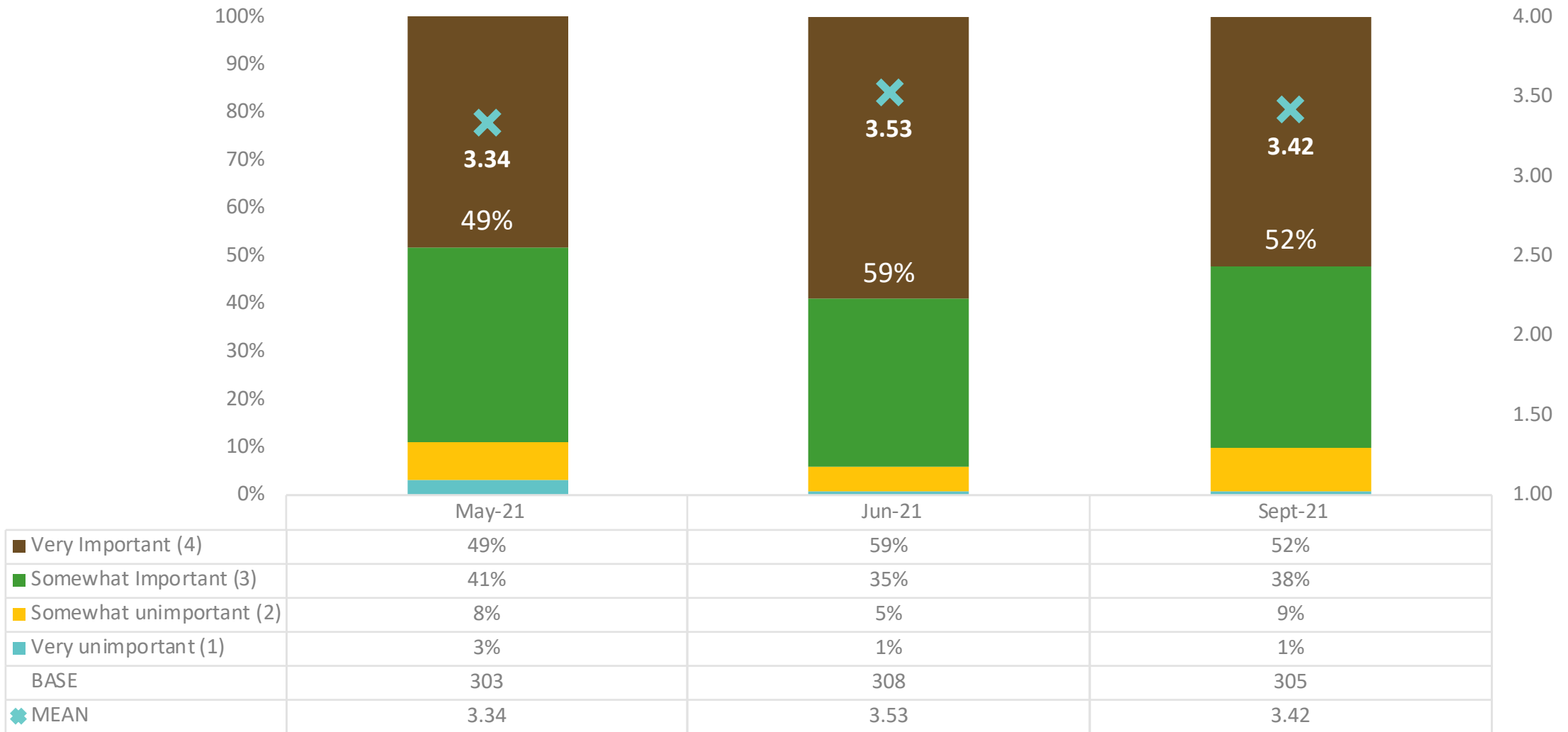
POST-COVID SELECTION FACTOR

Advanced hygiene measures



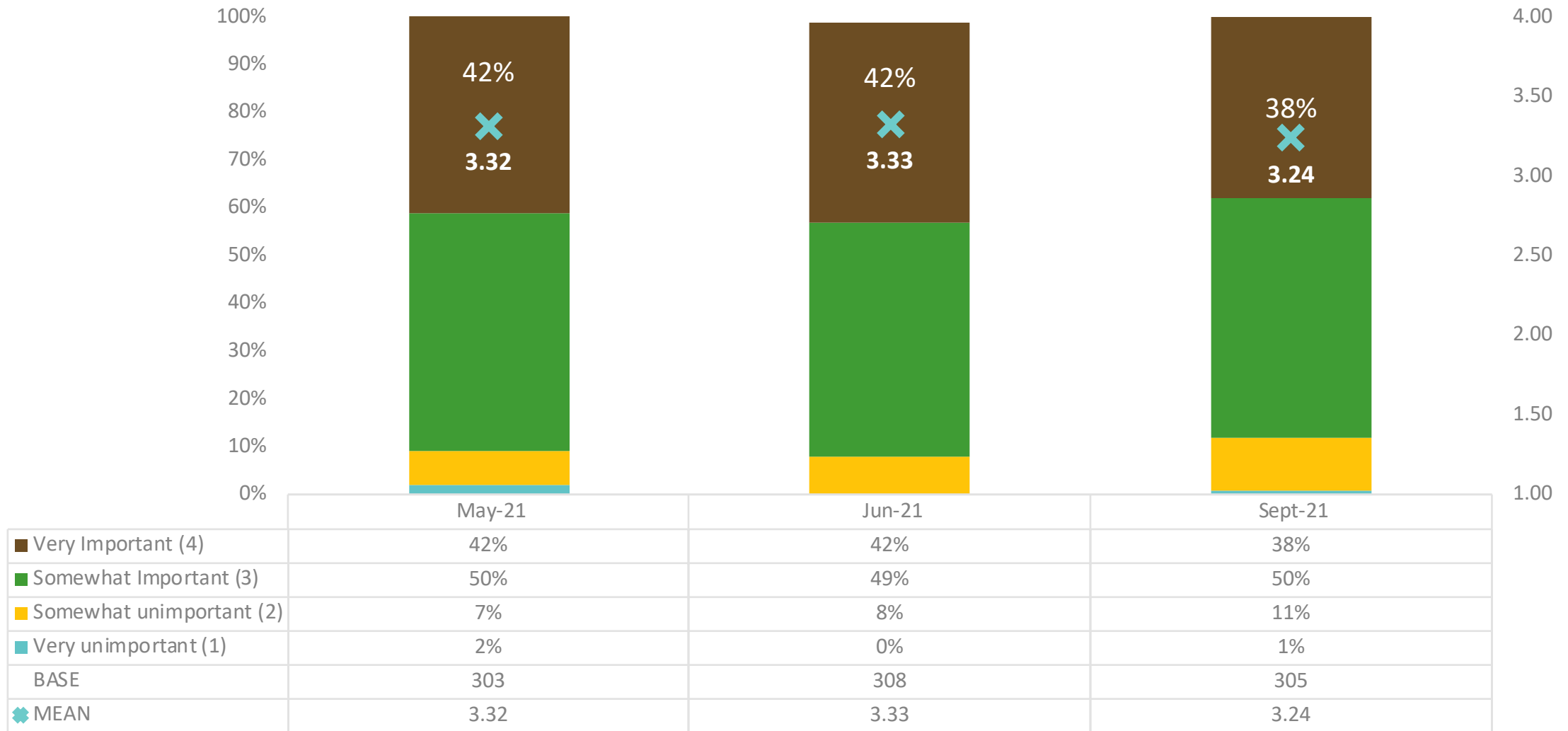
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



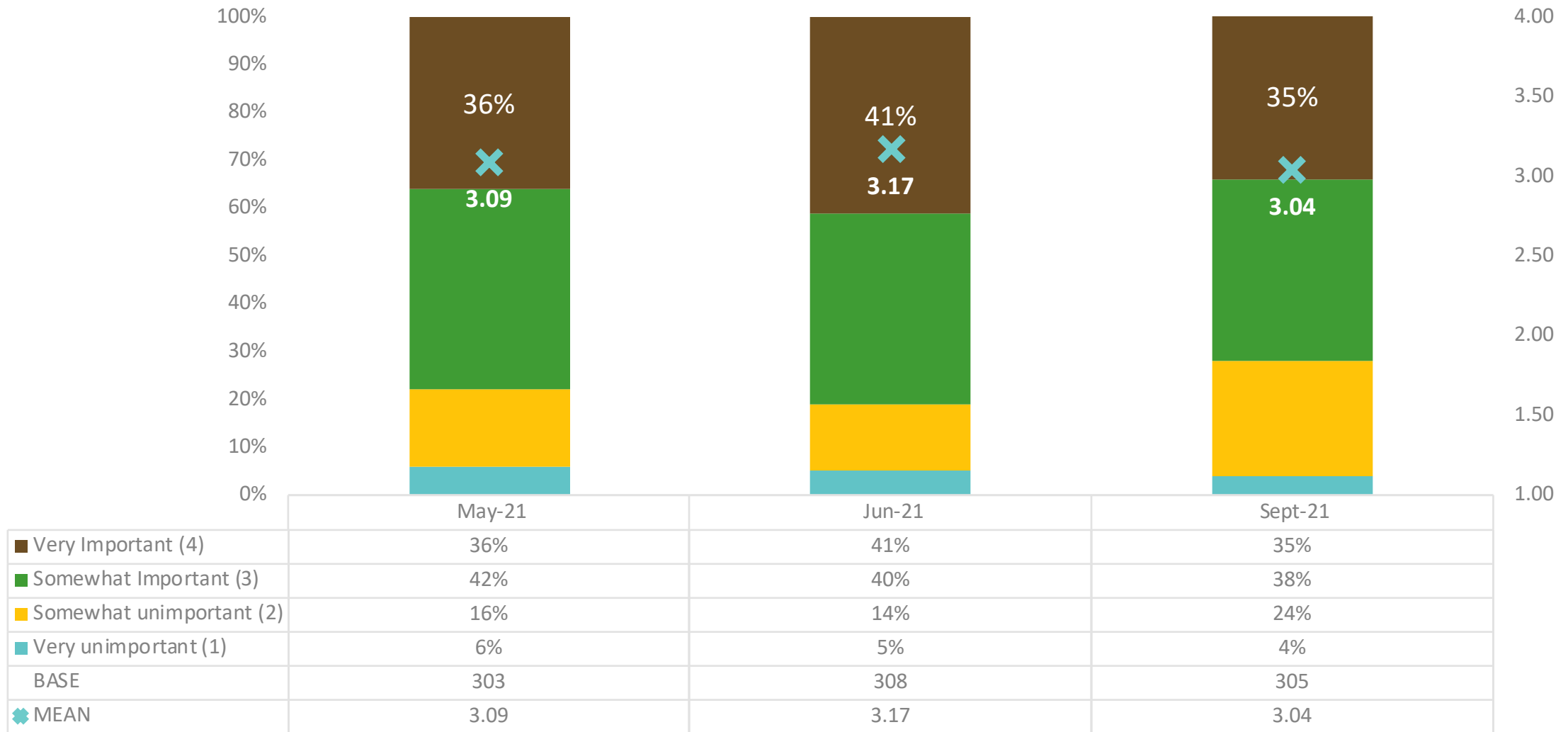
POST-COVID SELECTION FACTOR

Rural/ natural open areas



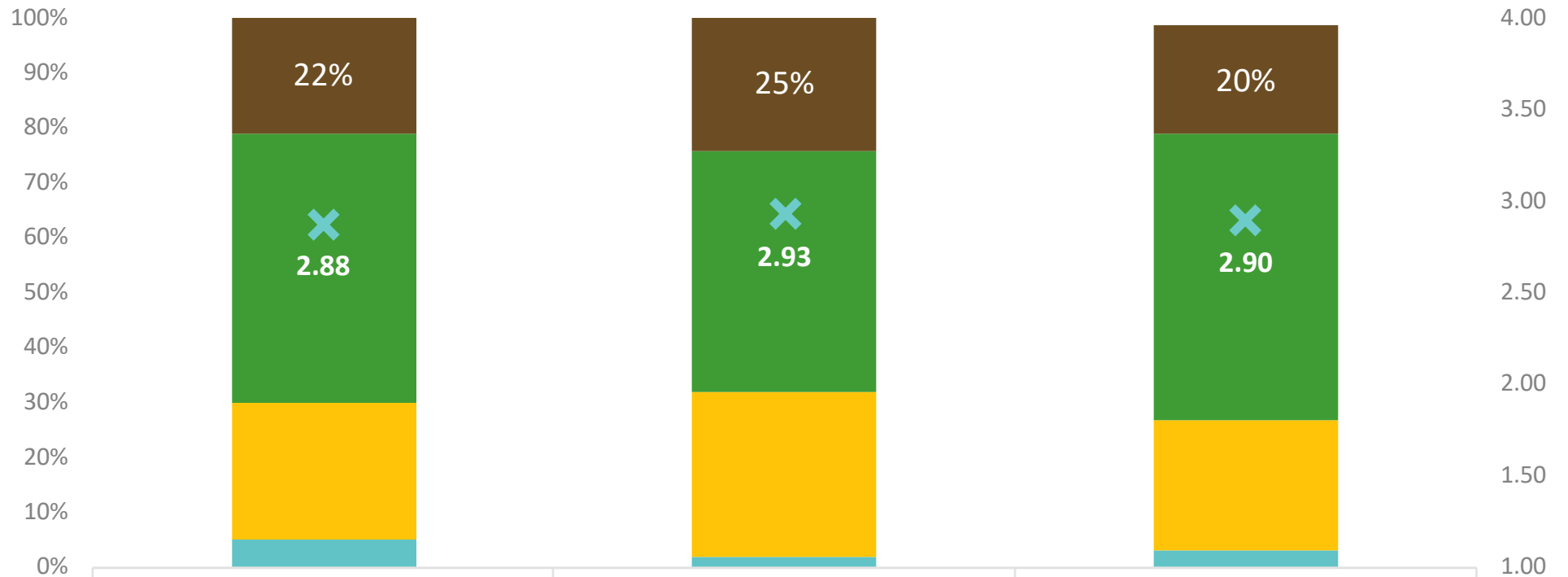
POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



POST-COVID SELECTION FACTOR

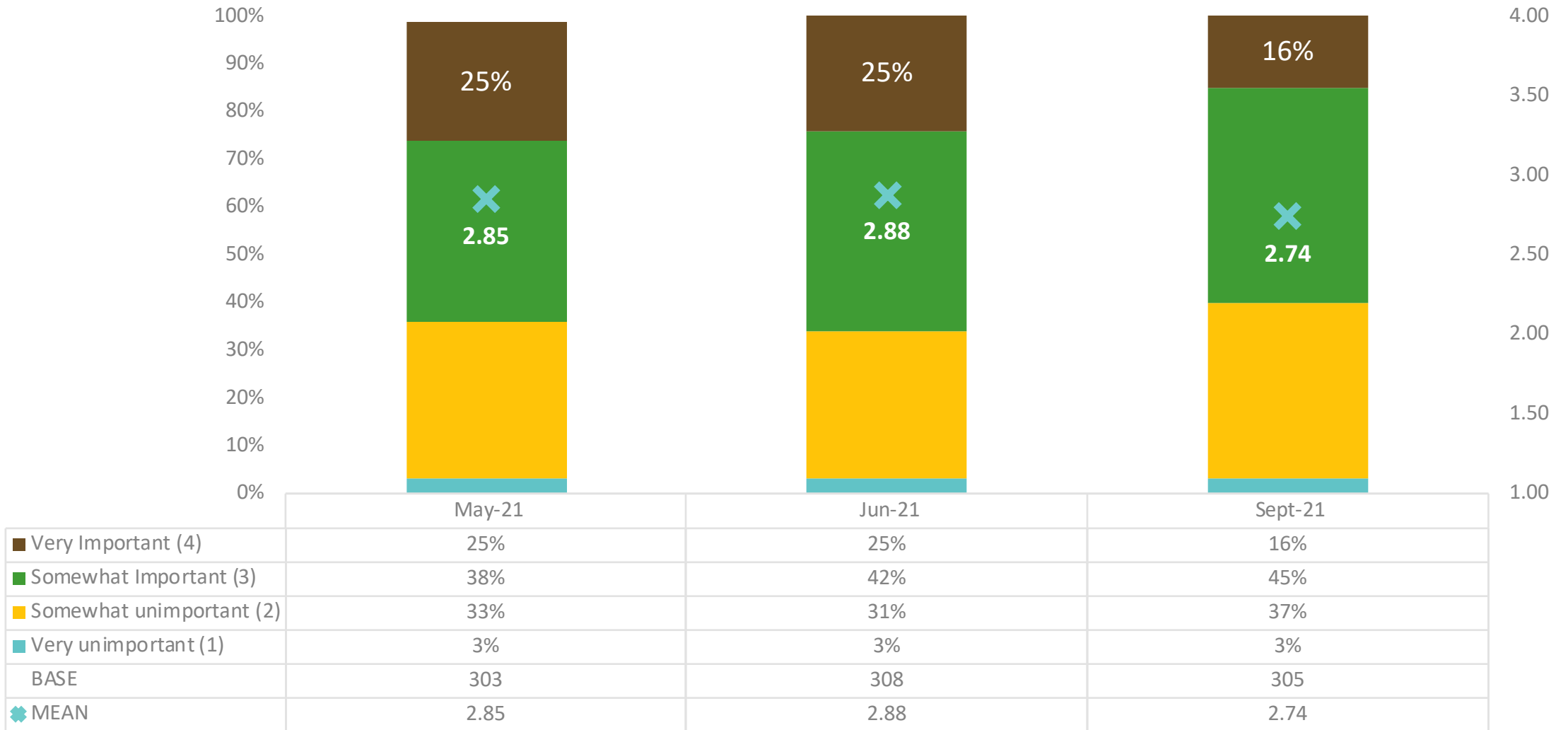
Secondary cities of interest



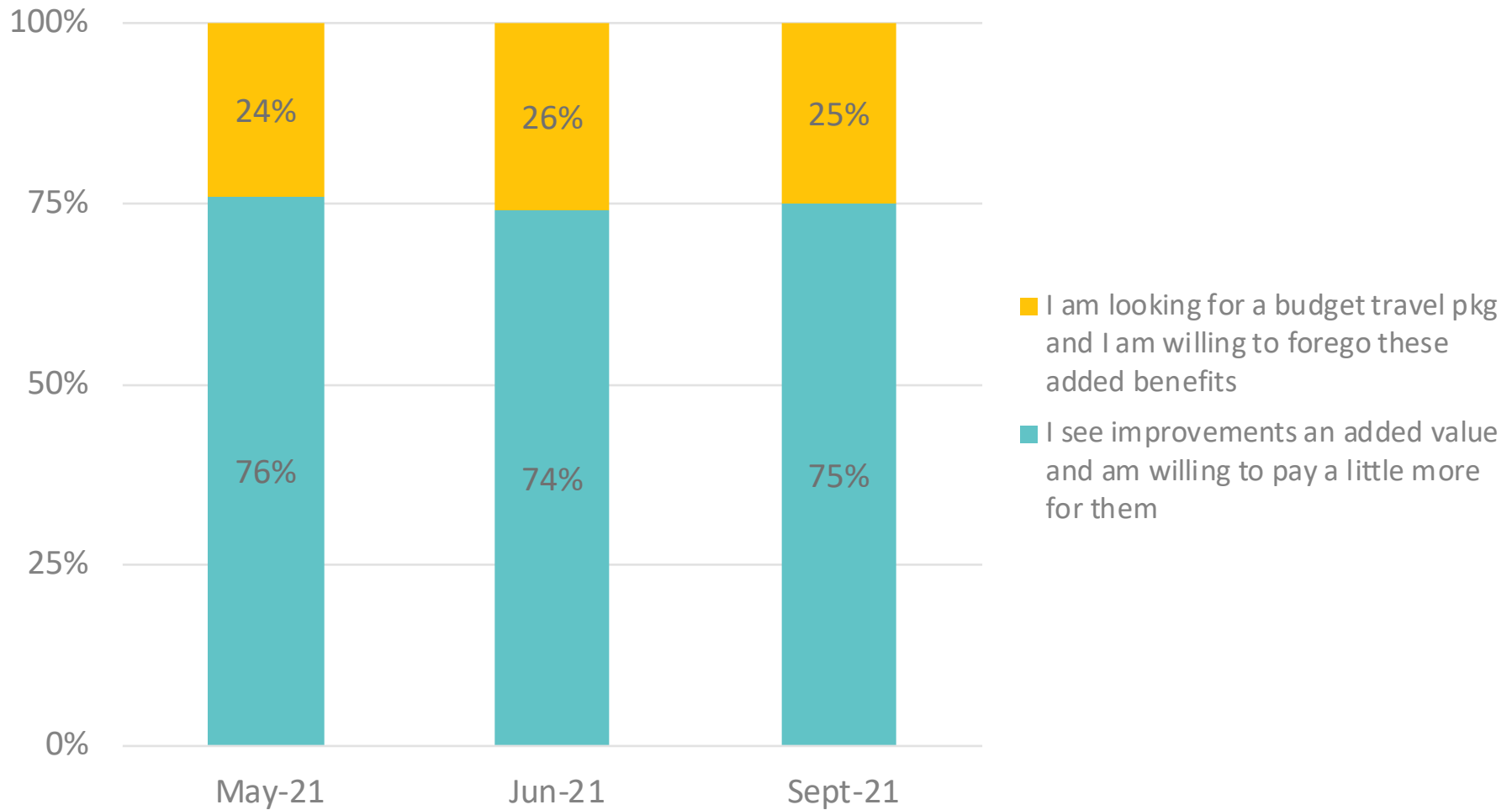
	May-21	Jun-21	Sept-21
Very Important (4)	22%	25%	20%
Somewhat Important (3)	49%	44%	52%
Somewhat unimportant (2)	25%	30%	24%
Very unimportant (1)	5%	2%	3%
BASE	303	308	305
MEAN	2.88	2.93	2.90

POST-COVID SELECTION FACTOR

Relatively low population density



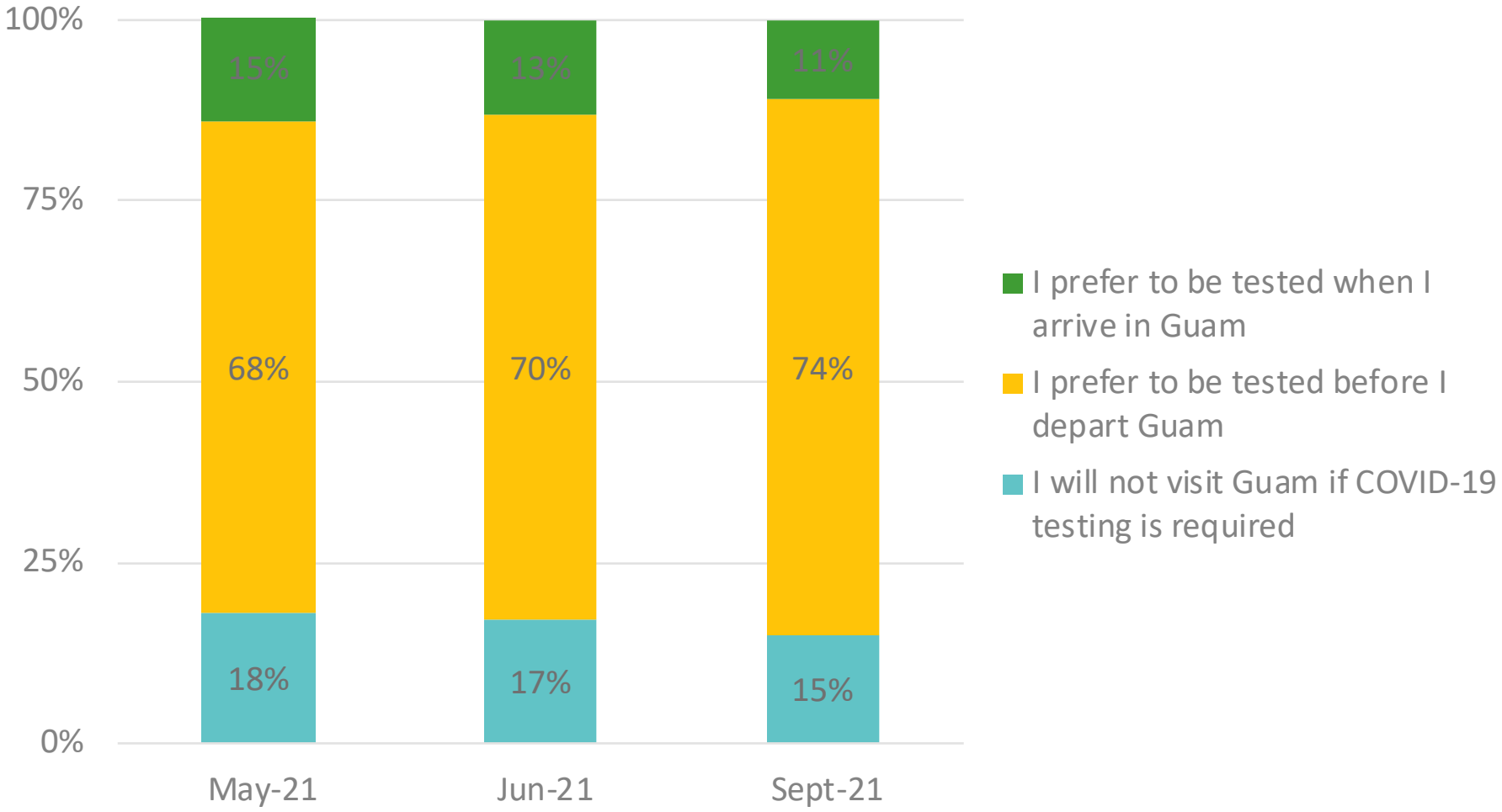
GUAM AIRPORT COVID-19 SAFETY MEASURES



45 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?



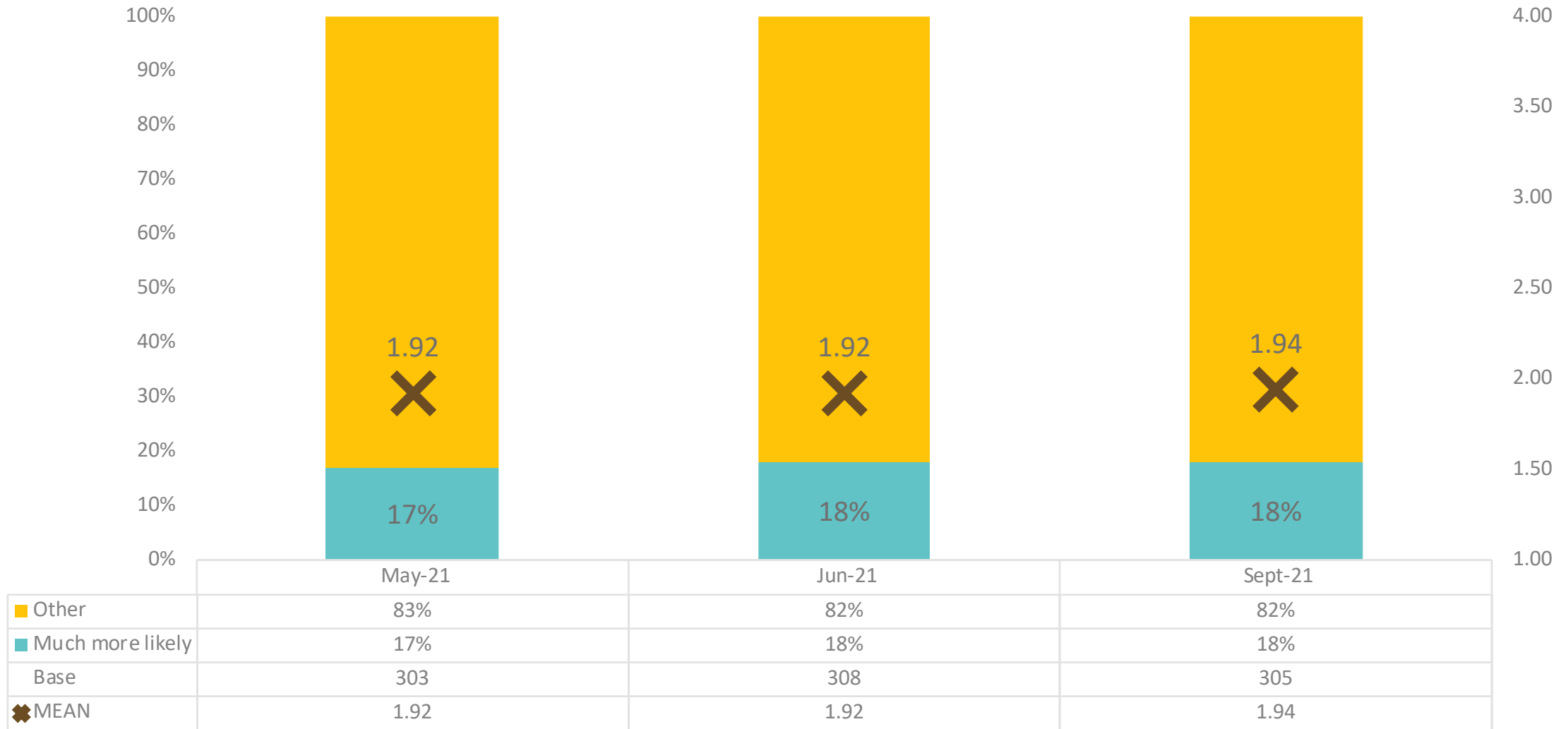
ON-ISLE COVID-19 TESTING PREFERENCE



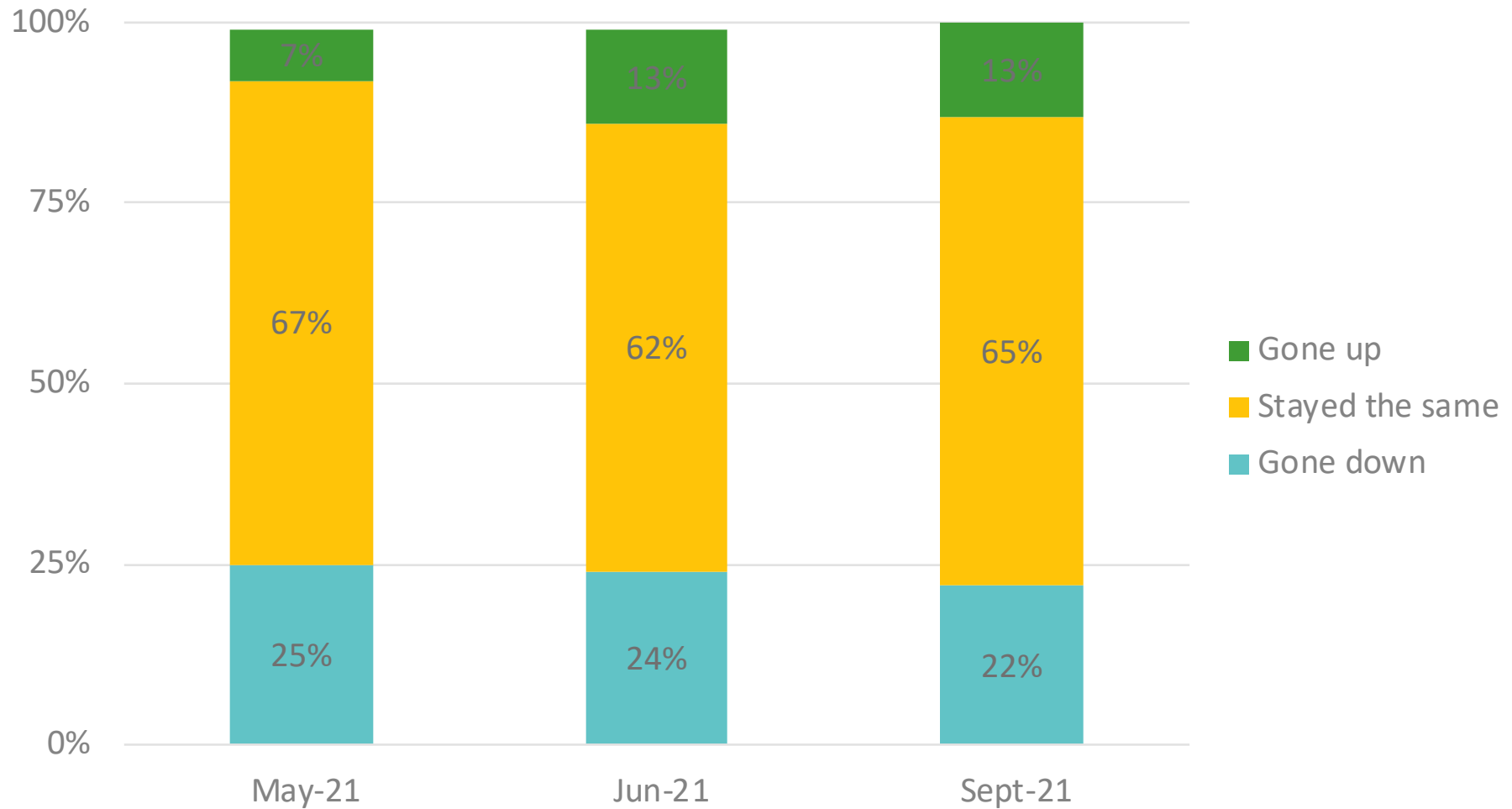
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



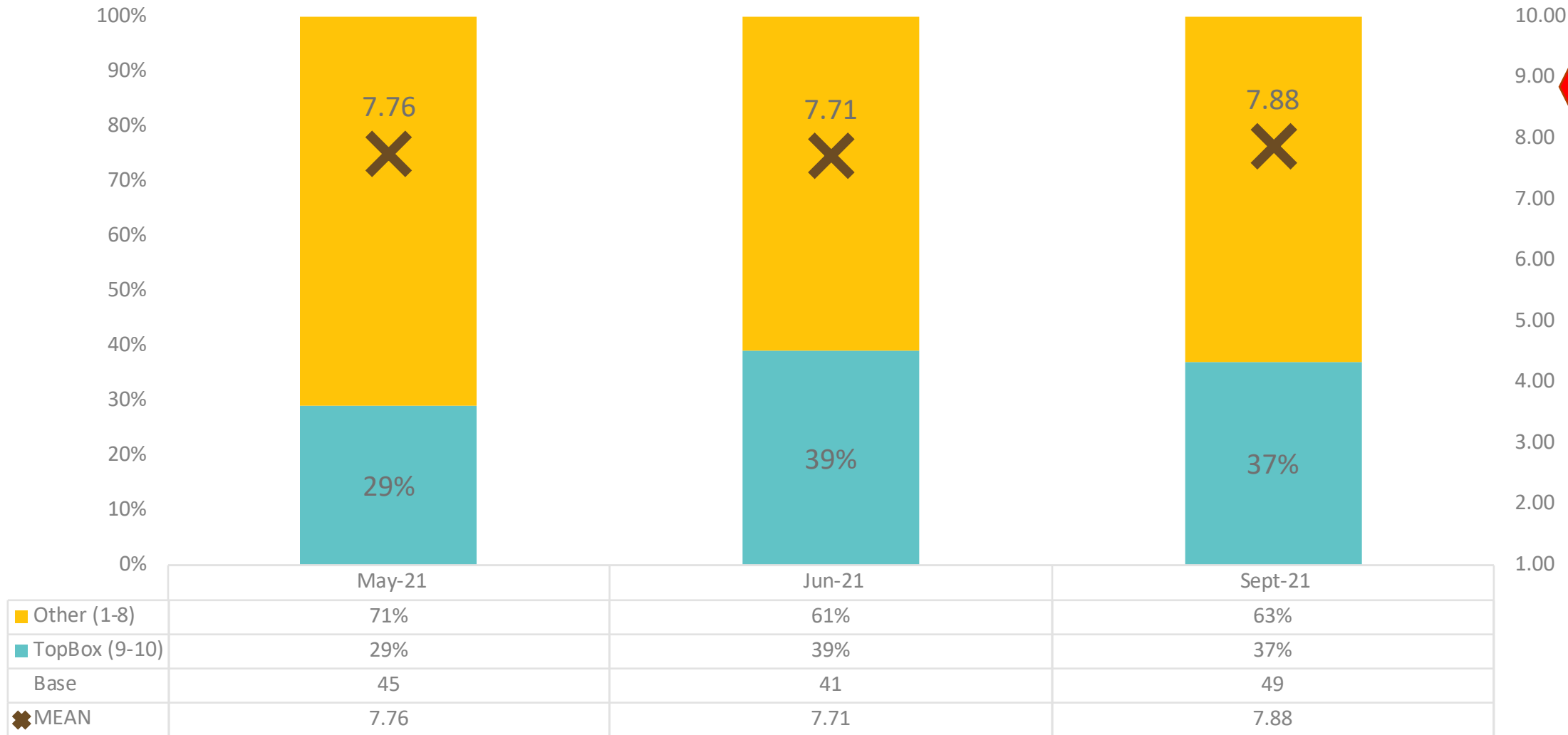


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



Caution
small
base

PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021	Sept 2021
BASE	45	41	49
Vacation/ pleasure	80%	76%	84%
Honeymoon	4%	7%	6%
Visit family/ friends	13%	5%	4%
Business/ conference/ convention/ trade show	-	2%	4%
Incentive trip	-	-	2%
Organized sporting activity/ event	-	7%	-
Attend school/ test/ career certification	2%	2%	-



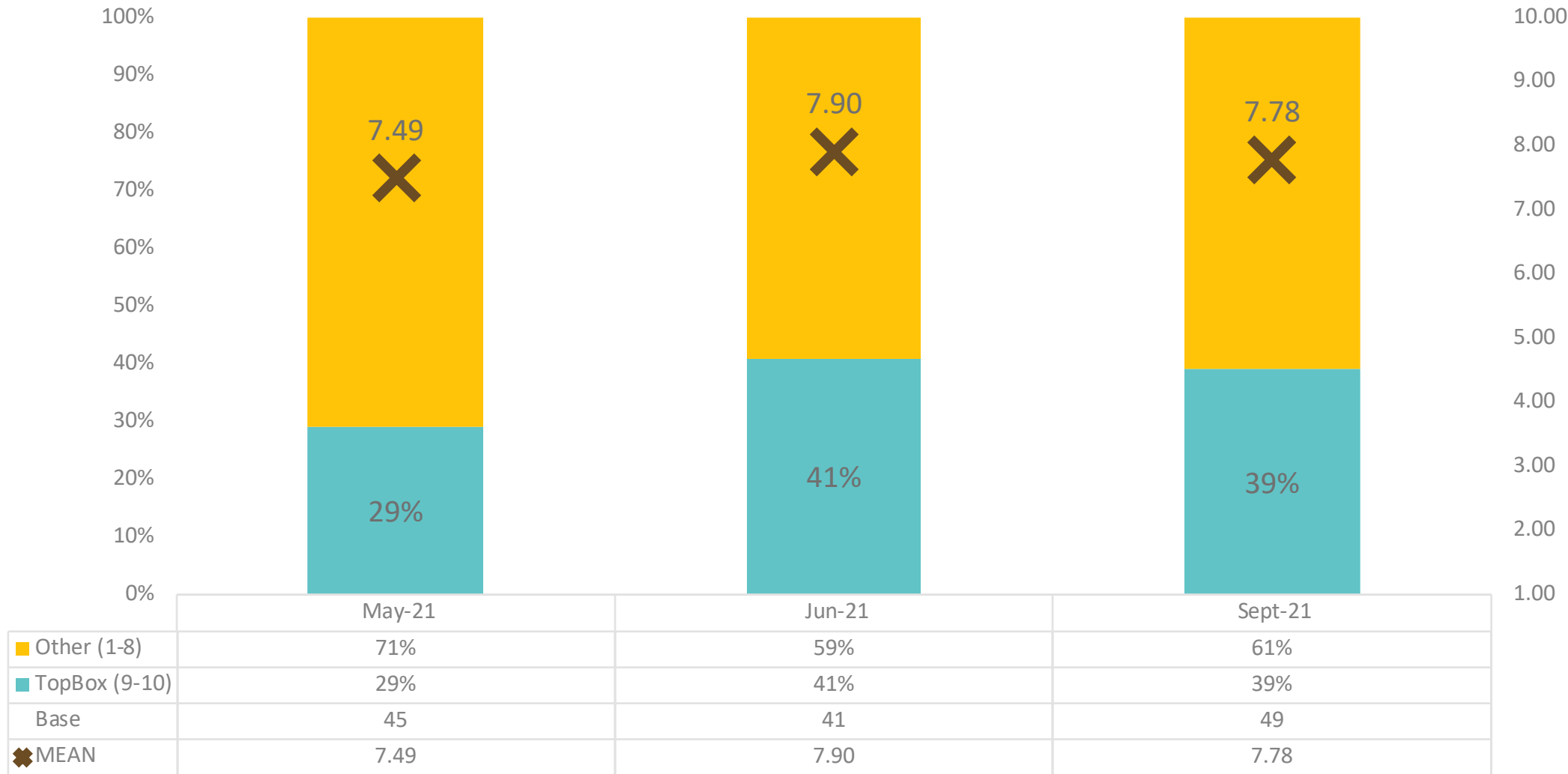
TRAVEL MOTIVATIONS – TOP 3

Tracking

	May-21	Jun-21	Sept-21
BASE	45	41	49
Beautiful seas, beaches, tropical climate	44%	59%	57%
Safe place to spend a vacation	42%	37%	57%
Short travel time	27%	15%	35%
Relaxation	27%	22%	24%
A previous trip	27%	20%	18%
Sightseeing	27%	27%	18%
Recommendation from friend/ relative/ travel agency	13%	15%	18%
Shopping	4%	7%	10%
Price	11%	12%	10%
Water activity	13%	22%	8%



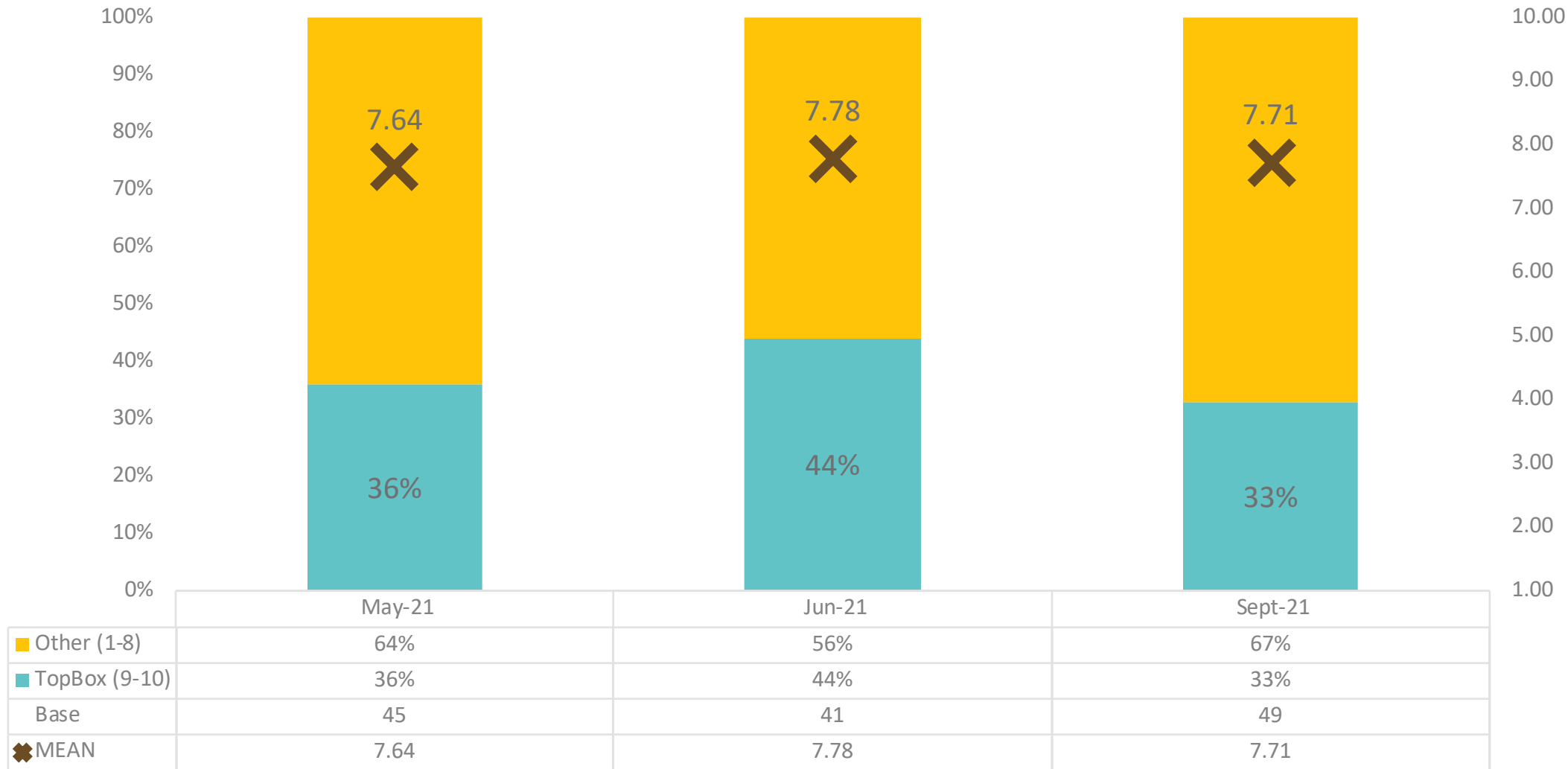
BRAND ADVOCACY – 10PT SCALE



Caution
small
base



BRAND LOYALTY – 10PT SCALE



GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021	Sept 2021
BASE	45	41	49
<i>Nature/ natural beauty/ scenery</i>	51%	49%	57%
<i>Beach/ ocean</i>	58%	46%	55%
<i>Weather/ climate/ good atmosphere/ fresh air</i>	56%	44%	47%
<i>Relaxation</i>	40%	46%	47%
<i>Safe environment</i>	16%	29%	37%
<i>Event- celebrate/ family/ friends</i>	18%	17%	24%
<i>Hotel/ accommodations</i>	33%	24%	22%
<i>Sightseeing</i>	27%	24%	22%
<i>Food – quality/ variety/ service</i>	13%	27%	22%
<i>Local culture/ people/ music</i>	24%	12%	22%
<i>Feeling the Hafa Adai spirit</i>	20%	15%	20%
<i>Shopping</i>	18%	15%	20%
<i>Variety of activities</i>	16%	10%	20%
<i>Overall customer service</i>	13%	2%	20%



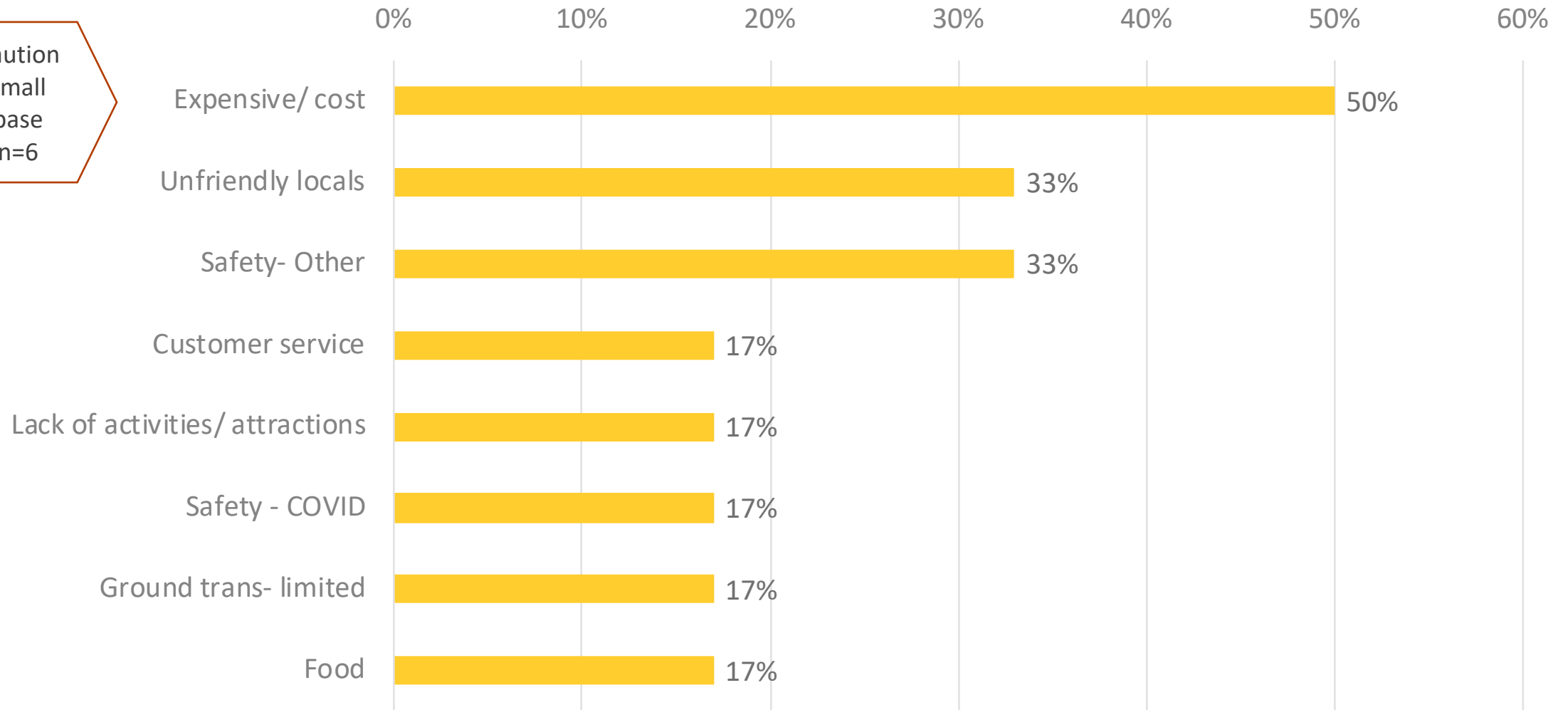
GUAM TRAVELERS – DRAWBACKS

	May 2021	June 2021	Sept 2021
BASE	45	41	49
<i>Ground transportation – limited options</i>	31%	27%	35%
<i>Language barrier/ difficulty communicating</i>	16%	20%	35%
<i>No negatives</i>	22%	24%	18%
<i>Expensive</i>	16%	27%	18%
<i>Health/ Safety/ COVID</i>	20%	20%	18%
<i>Food – quality/ variety/ service</i>	9%	20%	16%
<i>Traffic</i>	11%	7%	12%
<i>Customer service</i>	9%	2%	10%
<i>Lack of activities</i>	7%	-	10%
<i>Immigration</i>	20%	10%	10%
<i>Safety - other</i>	16%	12%	8%
<i>Accommodations</i>	9%	20%	6%



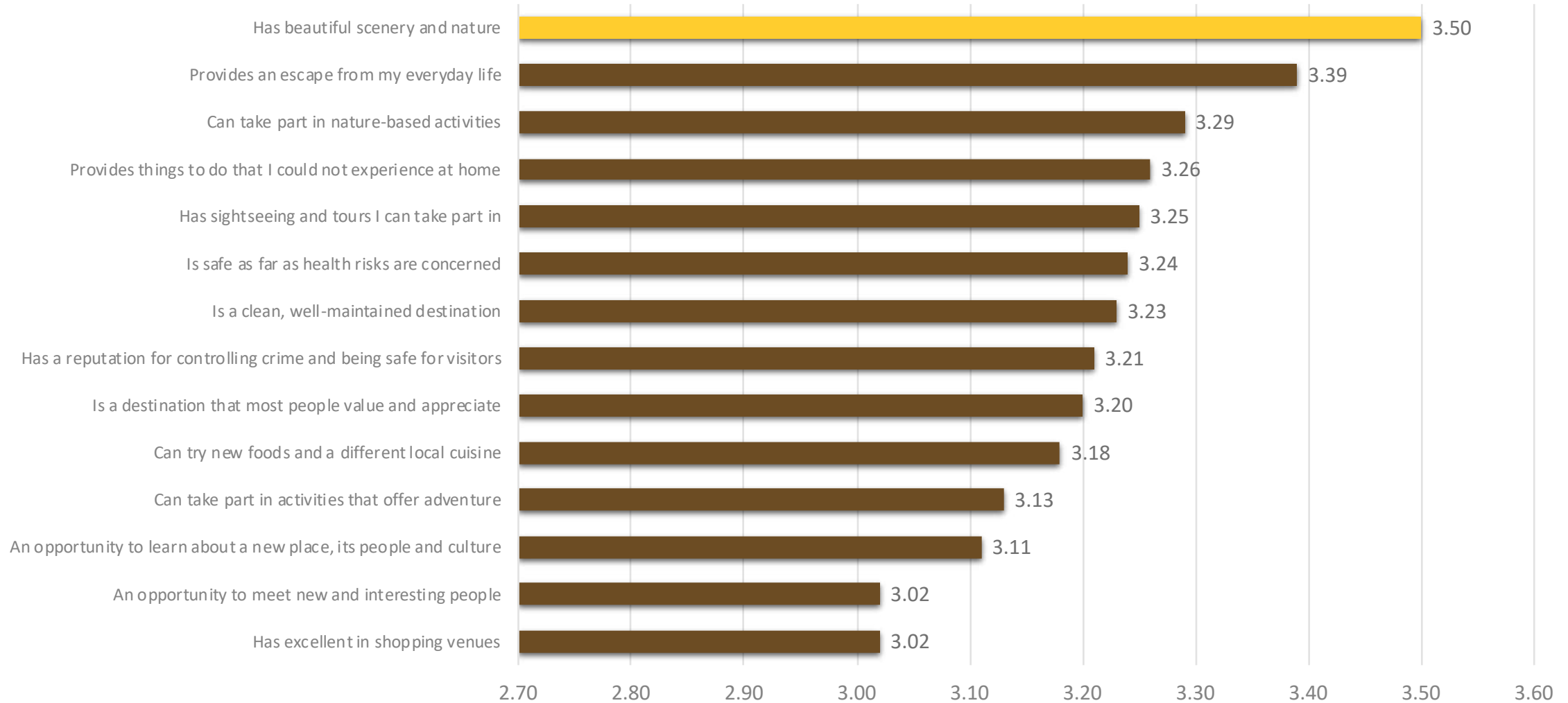
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=6



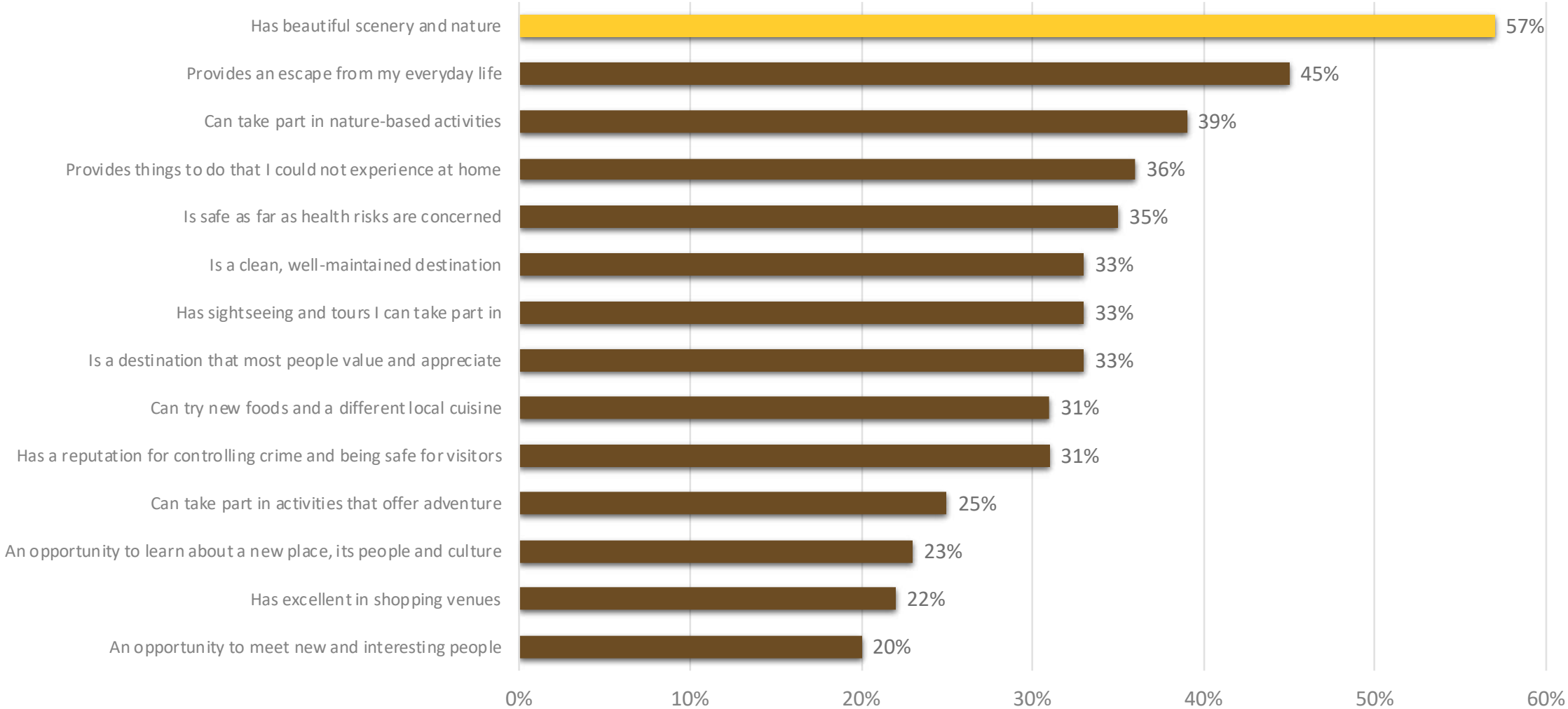
SELECTION FACTORS – SATISFACTION

MEAN SCORES 4PT SCALE

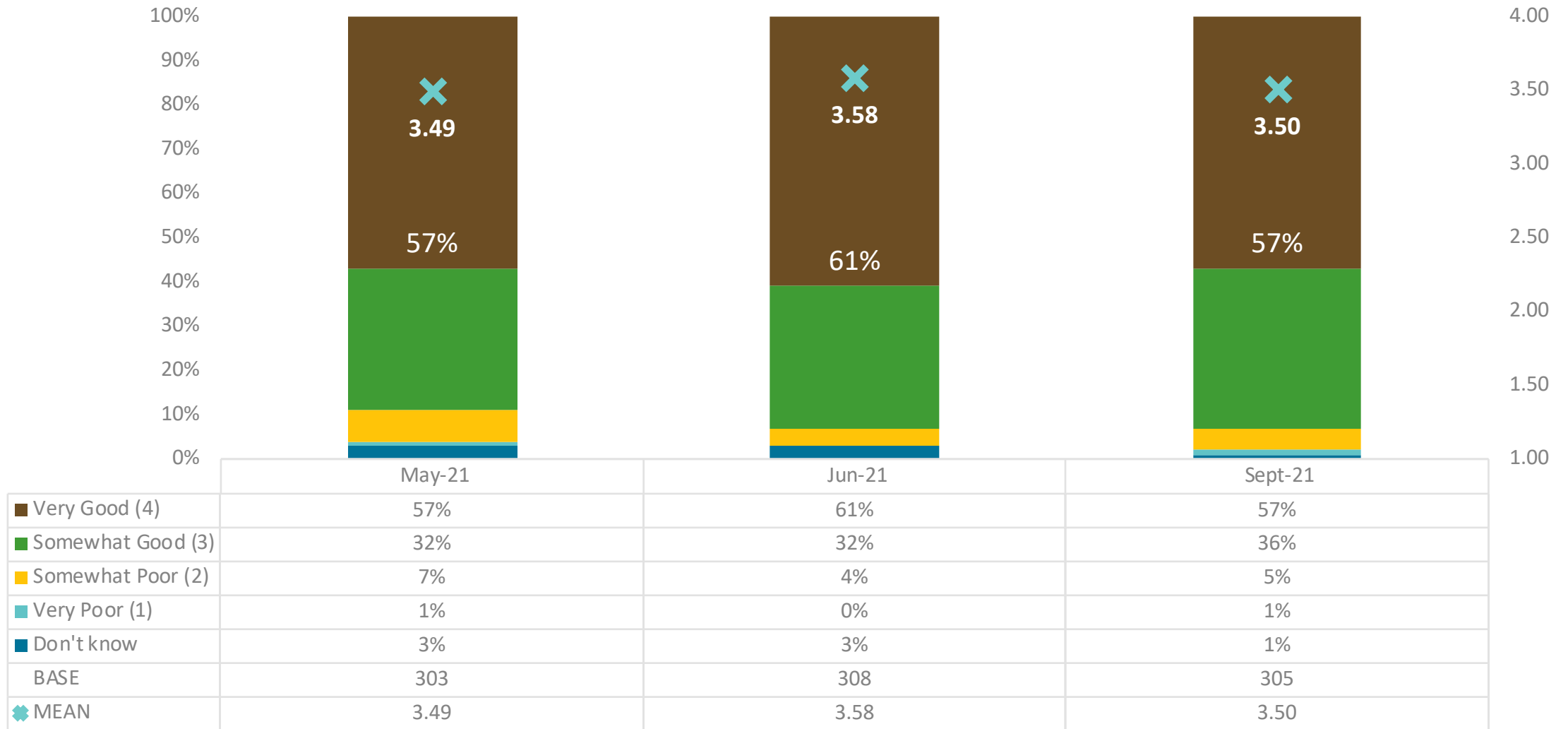


SELECTION FACTORS – SATISFACTION

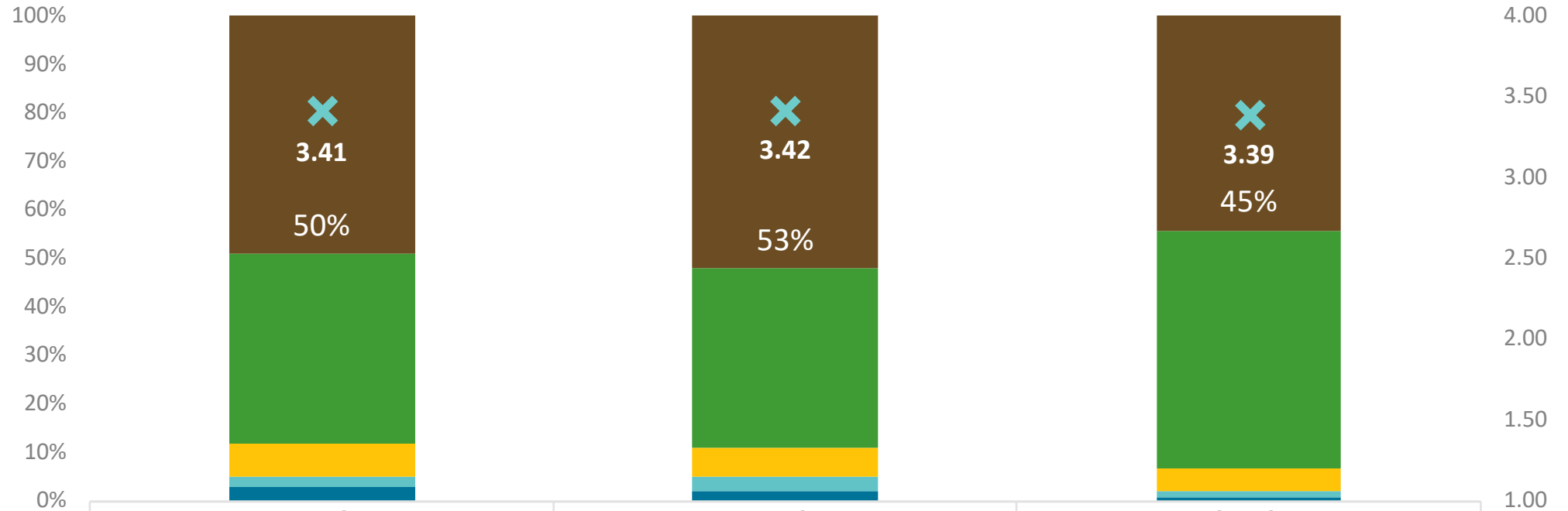
TOP BOX (VERY GOOD)



Has beautiful scenery and nature

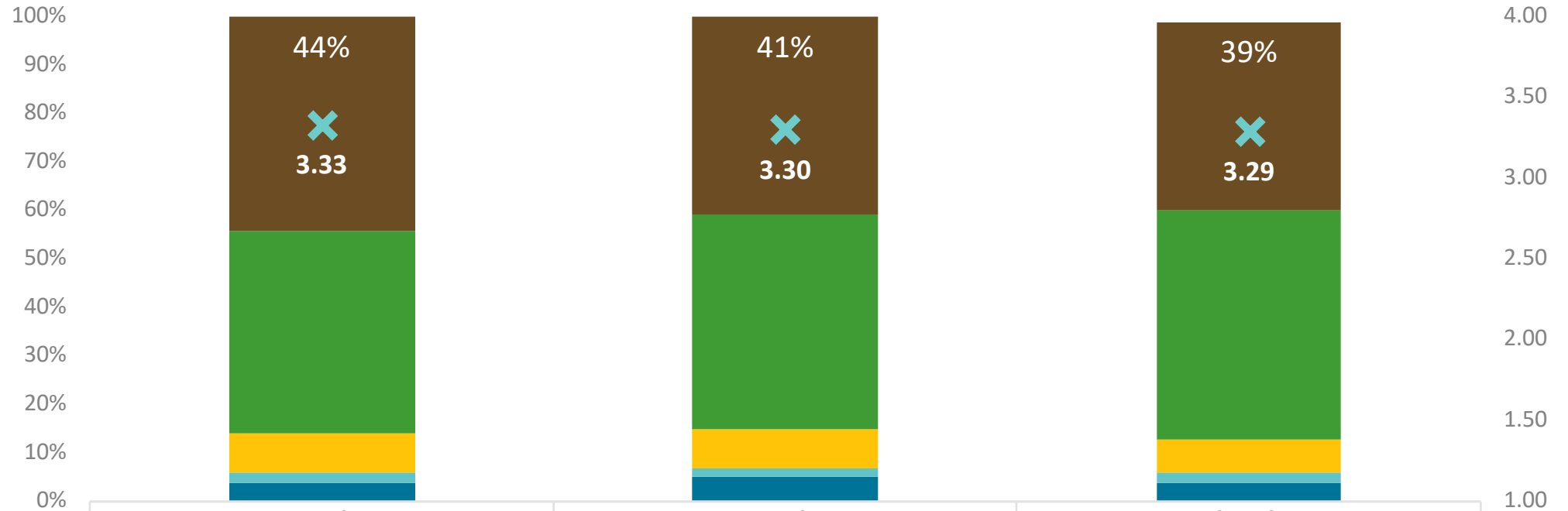


Provides an escape from my everyday life



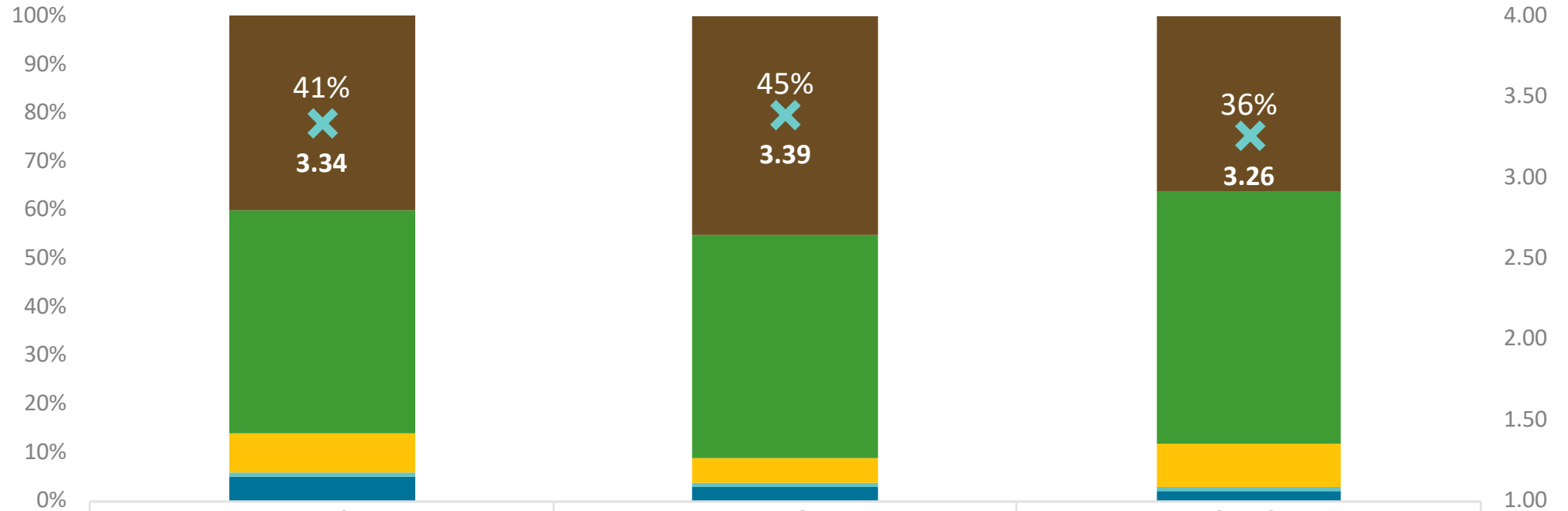
	May-21	Jun-21	Sept-21
Very Good (4)	50%	53%	45%
Somewhat Good (3)	39%	37%	49%
Somewhat Poor (2)	7%	6%	5%
Very Poor (1)	2%	3%	1%
Don't know	3%	2%	1%
BASE	303	308	305
MEAN	3.41	3.42	3.39

Can take part in nature-based activities



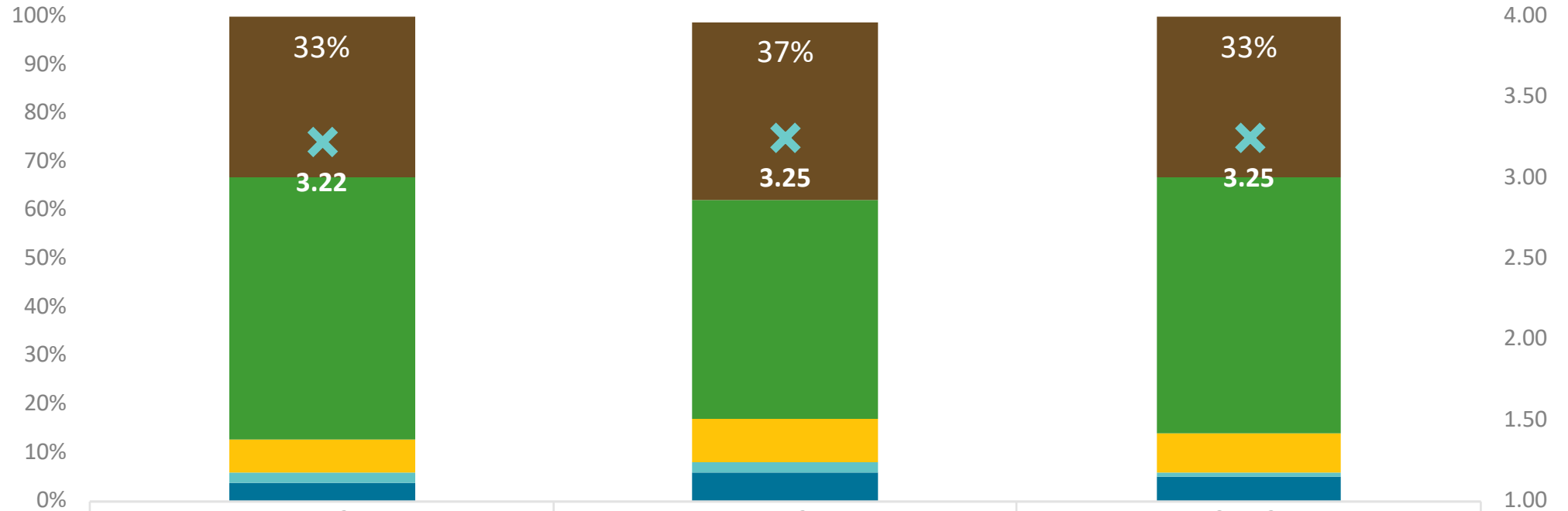
	May-21	Jun-21	Sept-21
Very Good (4)	44%	41%	39%
Somewhat Good (3)	42%	44%	47%
Somewhat Poor (2)	8%	8%	7%
Very Poor (1)	2%	2%	2%
Don't know	4%	5%	4%
BASE	303	308	305
MEAN	3.33	3.30	3.29

Provides things to do that I could not experience at home



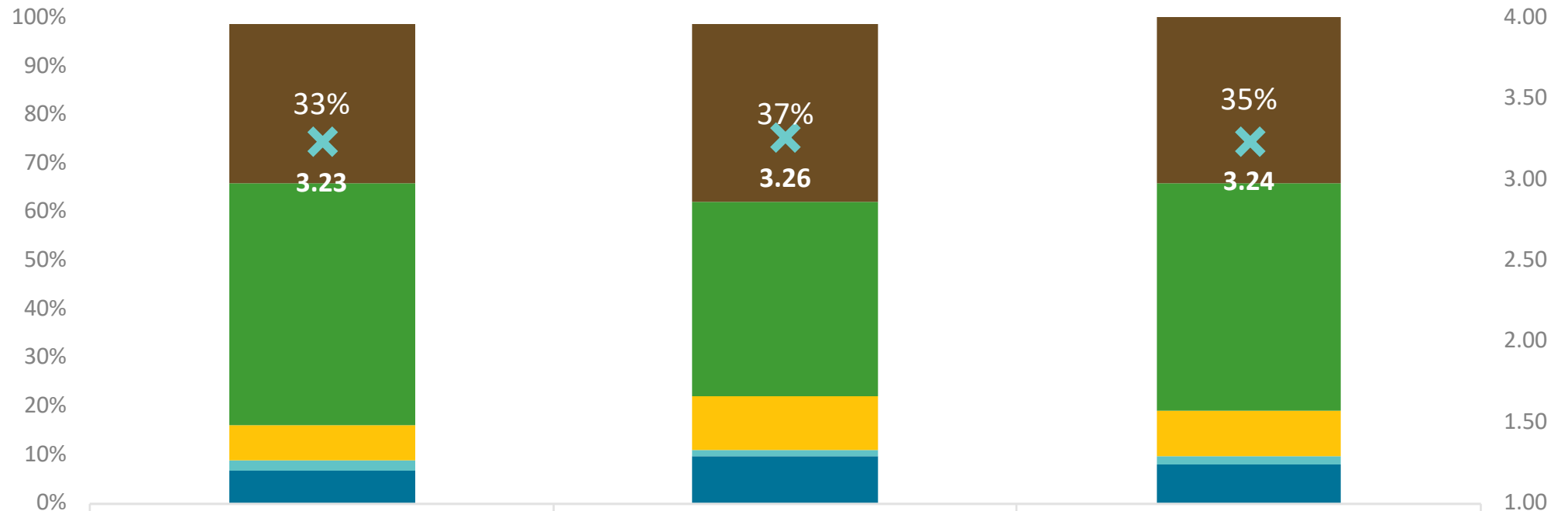
	May-21	Jun-21	Sept-21
Very Good (4)	41%	45%	36%
Somewhat Good (3)	46%	46%	52%
Somewhat Poor (2)	8%	5%	9%
Very Poor (1)	1%	1%	1%
Don't know	5%	3%	2%
BASE	303	308	305
MEAN	3.34	3.39	3.26

Has sightseeing and tours I can take part in



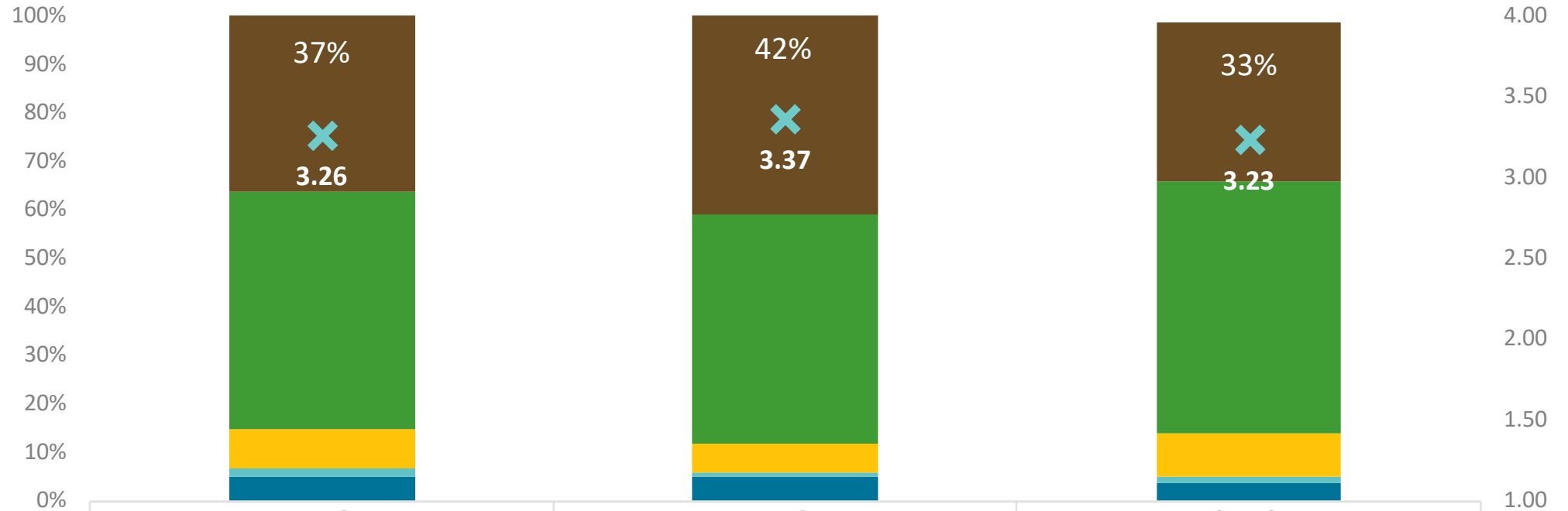
	May-21	Jun-21	Sept-21
Very Good (4)	33%	37%	33%
Somewhat Good (3)	54%	45%	53%
Somewhat Poor (2)	7%	9%	8%
Very Poor (1)	2%	2%	1%
Don't know	4%	6%	5%
BASE	303	308	305
MEAN	3.22	3.25	3.25

Is safe as far as health risks are concerned



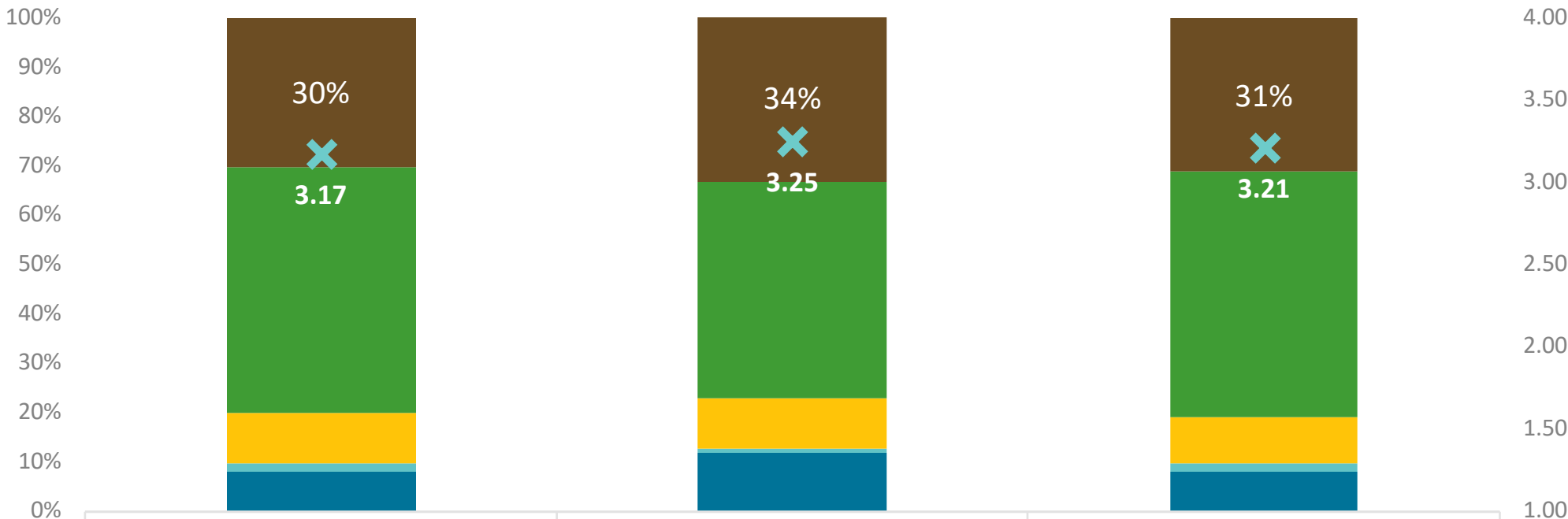
	May-21	Jun-21	Sept-21
Very Good (4)	33%	37%	35%
Somewhat Good (3)	50%	40%	47%
Somewhat Poor (2)	7%	11%	9%
Very Poor (1)	2%	1%	2%
Don't know	7%	10%	8%
BASE	303	308	305
MEAN	3.23	3.26	3.24

Is a clean, well-maintained destination



	May-21	Jun-21	Sept-21
Very Good (4)	37%	42%	33%
Somewhat Good (3)	49%	47%	52%
Somewhat Poor (2)	8%	6%	9%
Very Poor (1)	2%	1%	1%
Don't know	5%	5%	4%
BASE	303	308	305
MEAN	3.26	3.37	3.23

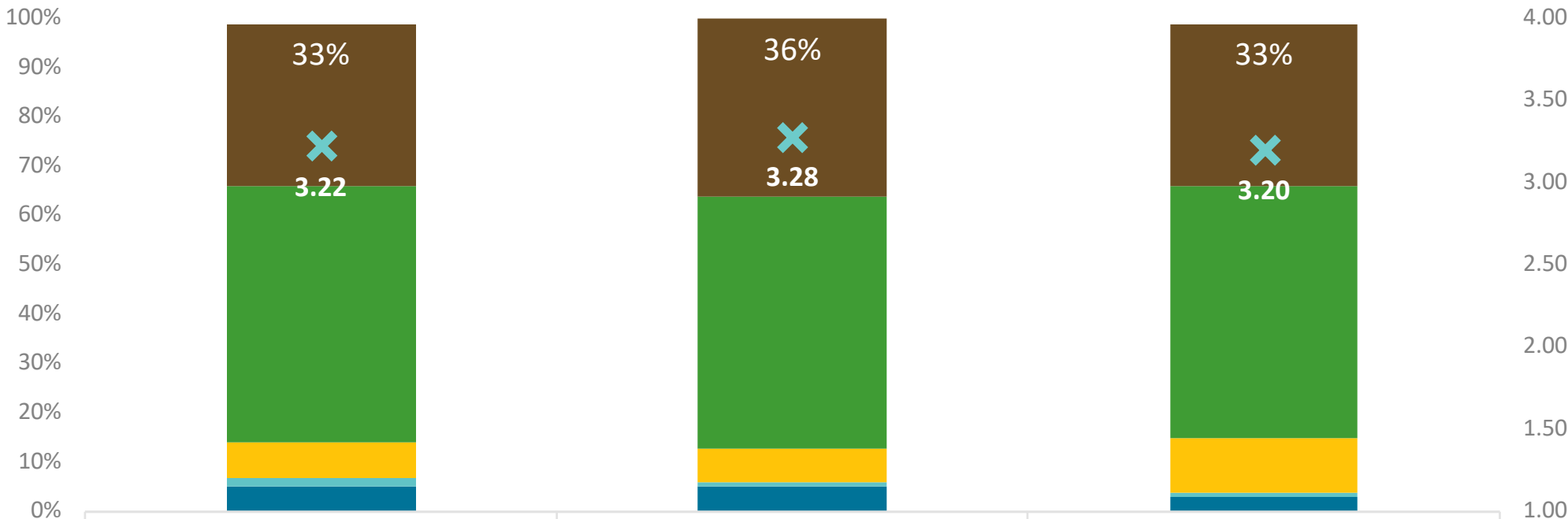
Has a reputation for controlling crime and being safe for visitors



	May-21	Jun-21	Sept-21
Very Good (4)	30%	34%	31%
Somewhat Good (3)	50%	44%	50%
Somewhat Poor (2)	10%	10%	9%
Very Poor (1)	2%	1%	2%
Don't know	8%	12%	8%
BASE	303	308	305
MEAN	3.17	3.25	3.21



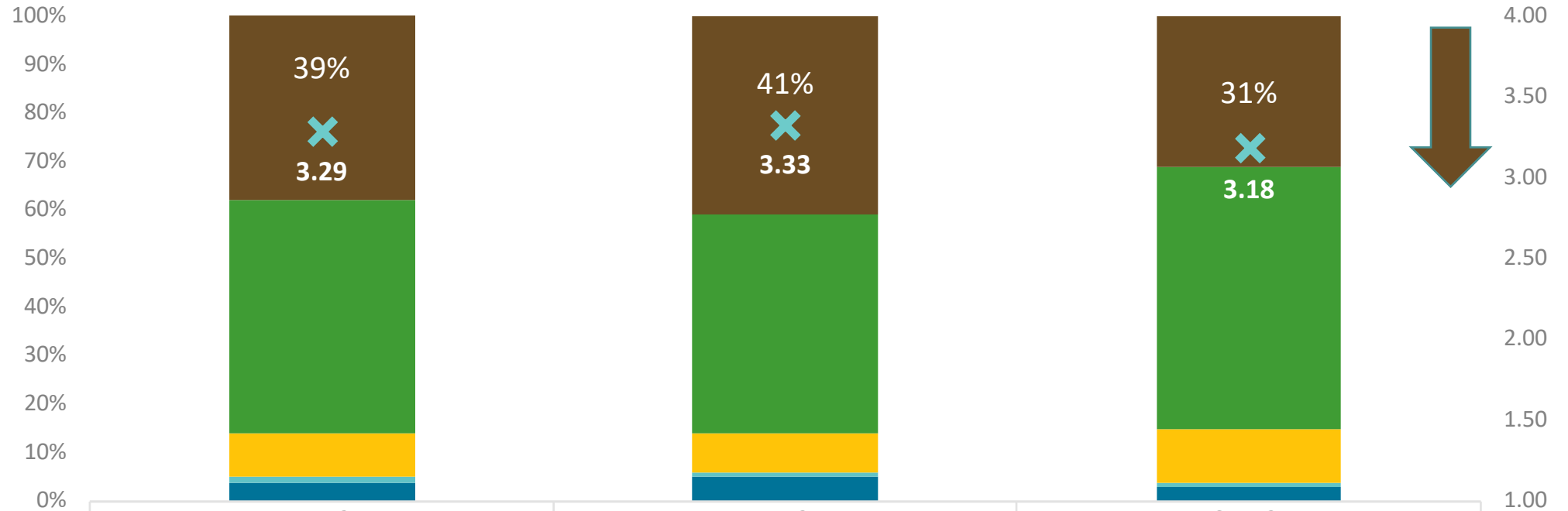
Is a destination that most people value and appreciate



	May-21	Jun-21	Sept-21
Very Good (4)	33%	36%	33%
Somewhat Good (3)	52%	51%	51%
Somewhat Poor (2)	7%	7%	11%
Very Poor (1)	2%	1%	1%
Don't know	5%	5%	3%
BASE	303	308	305
MEAN	3.22	3.28	3.20

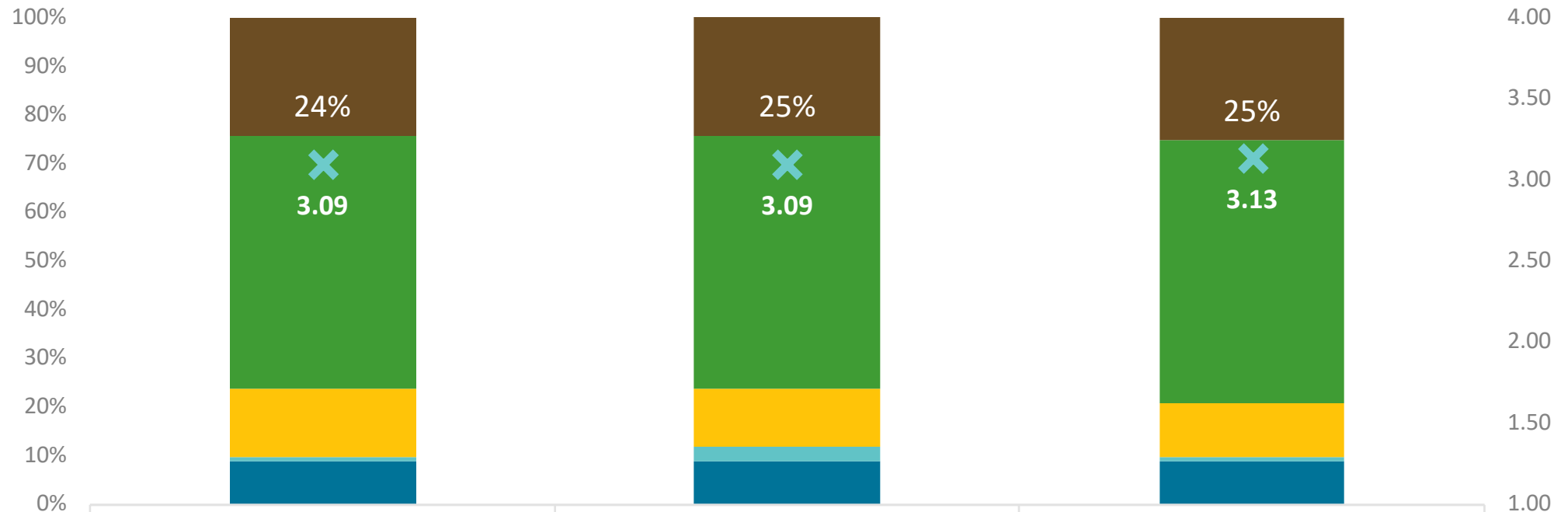


Can try new foods and a different local cuisine



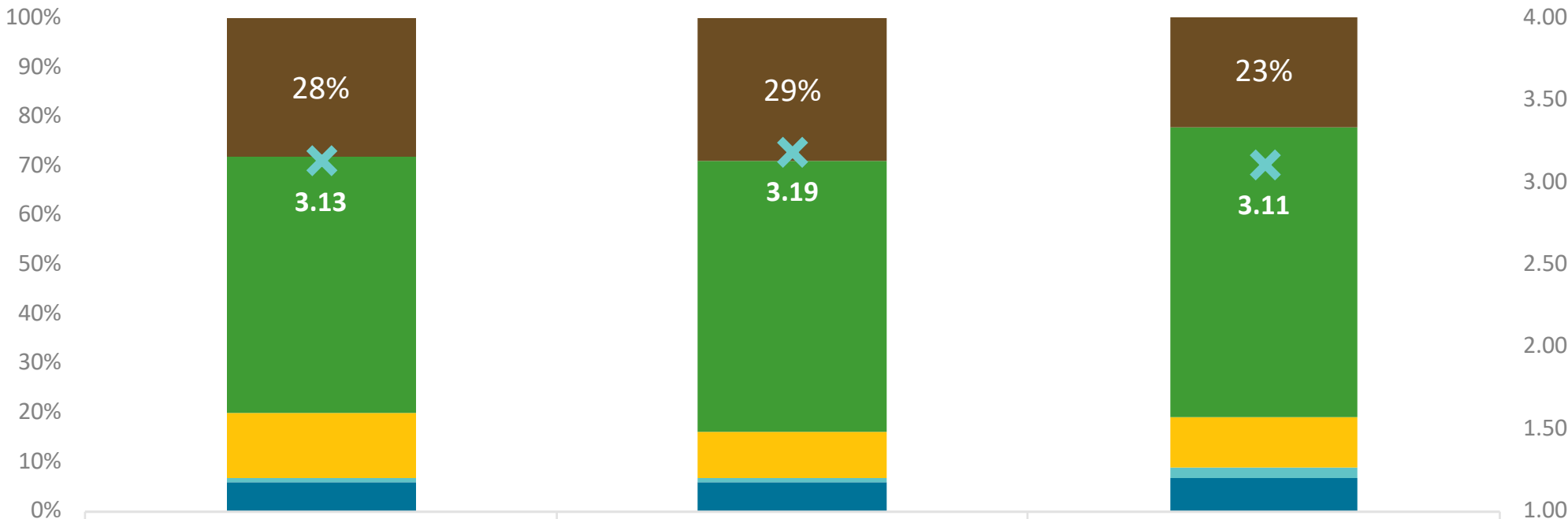
	May-21	Jun-21	Sept-21
Very Good (4)	39%	41%	31%
Somewhat Good (3)	48%	45%	54%
Somewhat Poor (2)	9%	8%	11%
Very Poor (1)	1%	1%	1%
Don't know	4%	5%	3%
BASE	303	308	305
MEAN	3.29	3.33	3.18

Can take part in activities that offer adventure



	May-21	Jun-21	Sept-21
Very Good (4)	24%	25%	25%
Somewhat Good (3)	52%	52%	54%
Somewhat Poor (2)	14%	12%	11%
Very Poor (1)	1%	3%	1%
Don't know	9%	9%	9%
BASE	303	308	305
MEAN	3.09	3.09	3.13

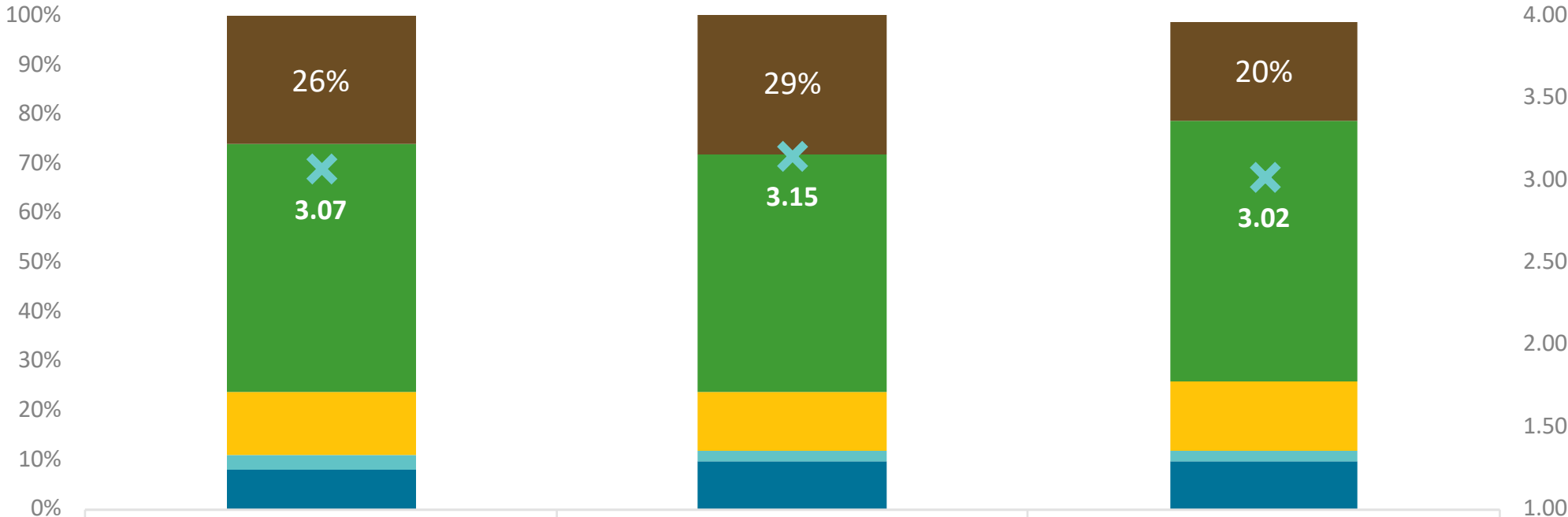
An opportunity to learn about a new place, its people and culture



	May-21	Jun-21	Sept-21
Very Good (4)	28%	29%	23%
Somewhat Good (3)	52%	55%	59%
Somewhat Poor (2)	13%	9%	10%
Very Poor (1)	1%	1%	2%
Don't know	6%	6%	7%
BASE	303	308	305
MEAN	3.13	3.19	3.11



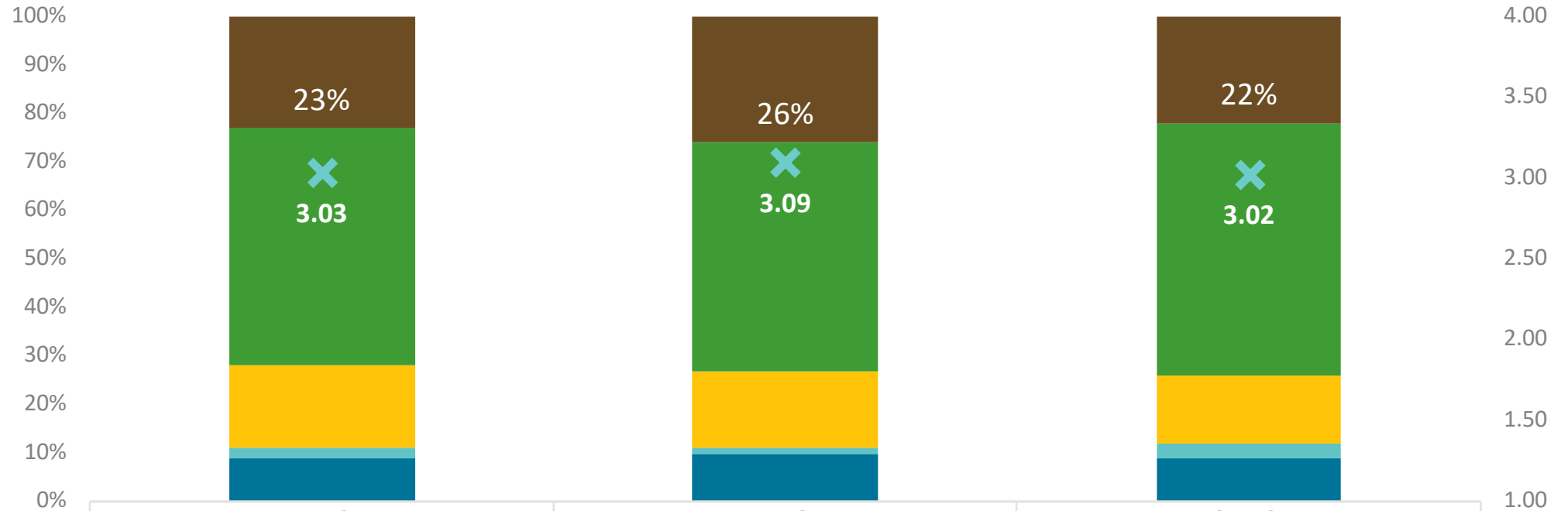
An opportunity to meet new and interesting people



	May-21	Jun-21	Sept-21
Very Good (4)	26%	29%	20%
Somewhat Good (3)	50%	48%	53%
Somewhat Poor (2)	13%	12%	14%
Very Poor (1)	3%	2%	2%
Don't know	8%	10%	10%
BASE	303	308	305
MEAN	3.07	3.15	3.02



Has excellent shopping in venues



	May-21	Jun-21	Sept-21
Very Good (4)	23%	26%	22%
Somewhat Good (3)	49%	47%	52%
Somewhat Poor (2)	17%	16%	14%
Very Poor (1)	2%	1%	3%
Don't know	9%	10%	9%
BASE	303	308	305
MEAN	3.03	3.09	3.02

NEED-GAP ANALYSIS

STRATEGIC ADVANTAGE
HIGH IMPORTANCE
HIGH VISITOR
SATISFACTION

KEY VULNERABILITY
HIGH IMPORTANCE
LOW VISITOR
SATISFACTION

Has a reputation for controlling crime and being safe for visitors

Is a clean, well-maintained...

Is safe as far as health risks are concerned

Provides an escape from my everyday life

Has beautiful scenery and nature

Can try new foods and a different local cuisine

Provides things to do that I could not experience at home

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

Has excellent in shopping venues

An opportunity to meet new and interesting people

Can take part in activities that offer adventure

Can take part in nature-based activities

Is a destination that most people value and appreciate

Has sightseeing and tours I can take part in

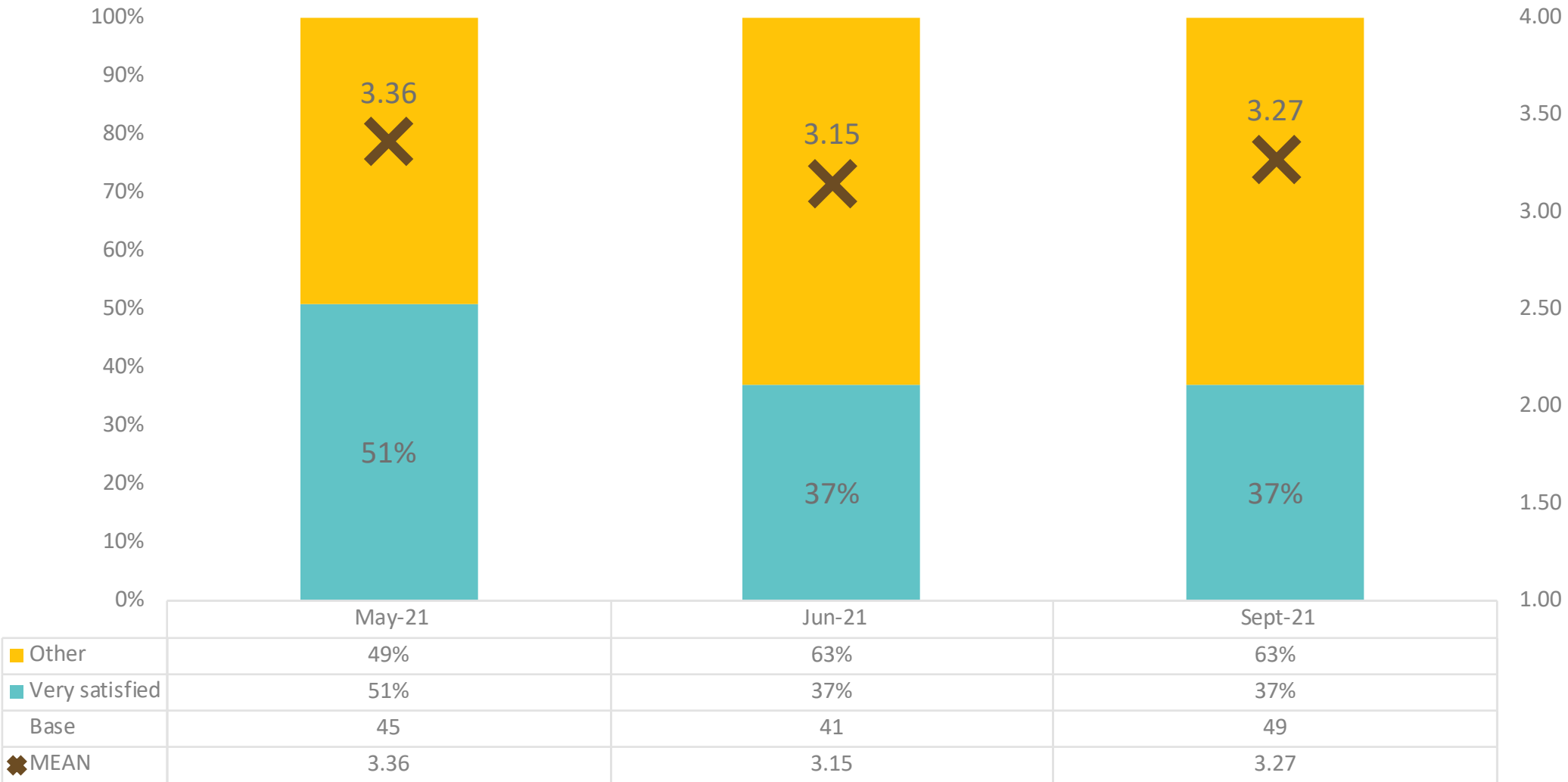
POTENTIAL VULNERABILITY
LOW IMPORTANCE
LOW VISITOR
SATISFACTION

POTENTIAL ADVANTAGE
LOW IMPORTANCE
HIGH VISITOR
SATISFACTION



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

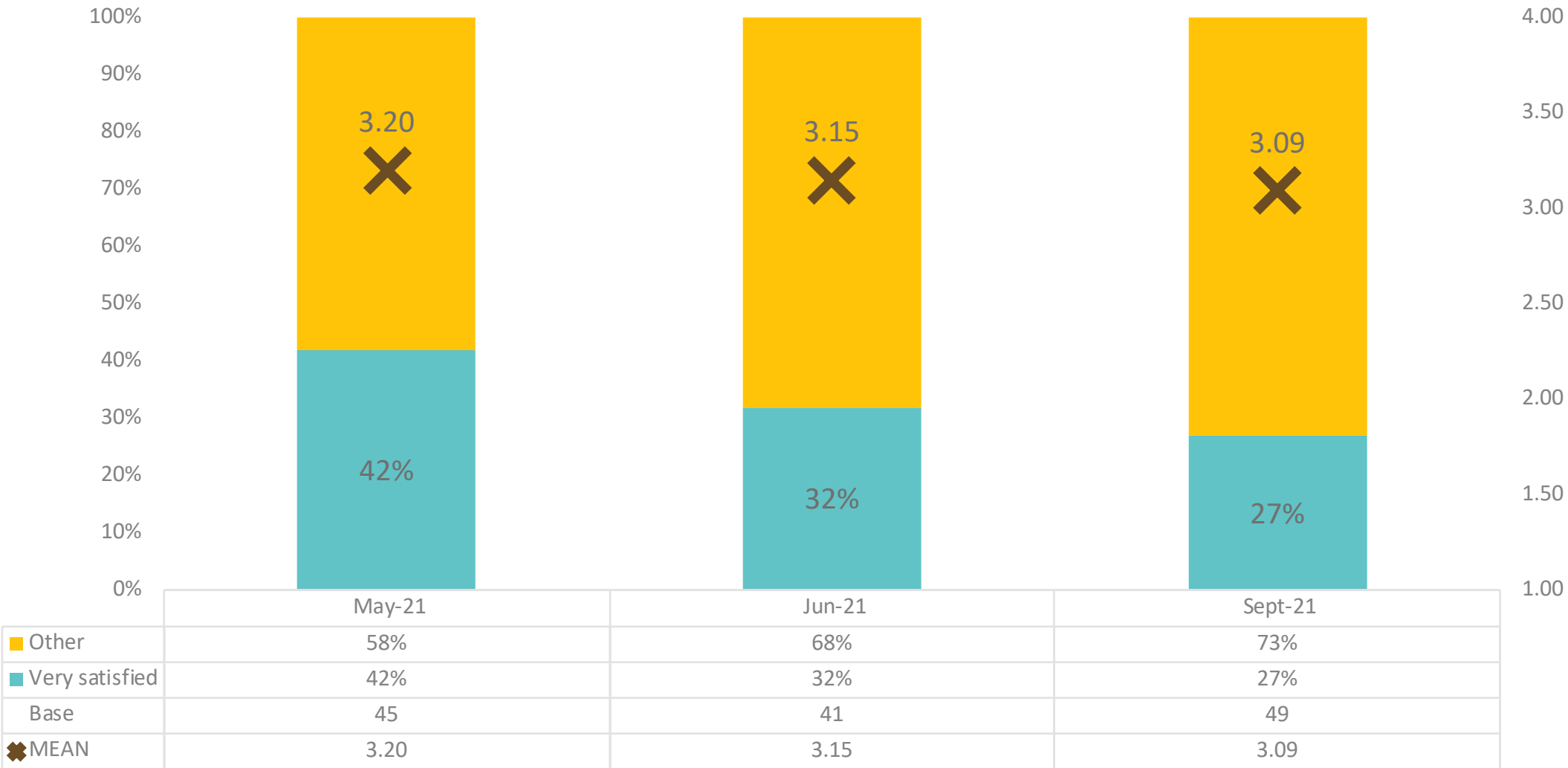


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

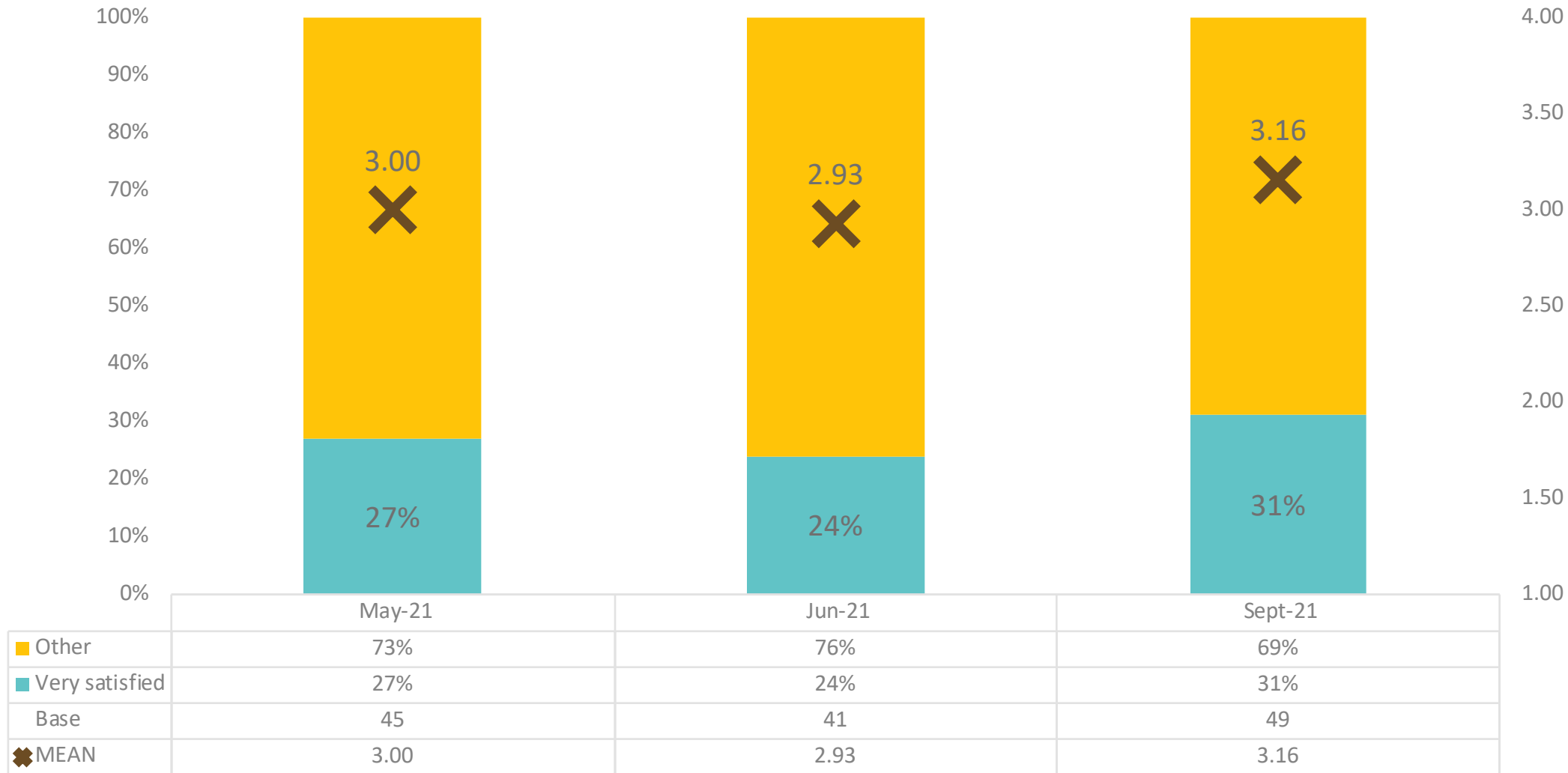


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

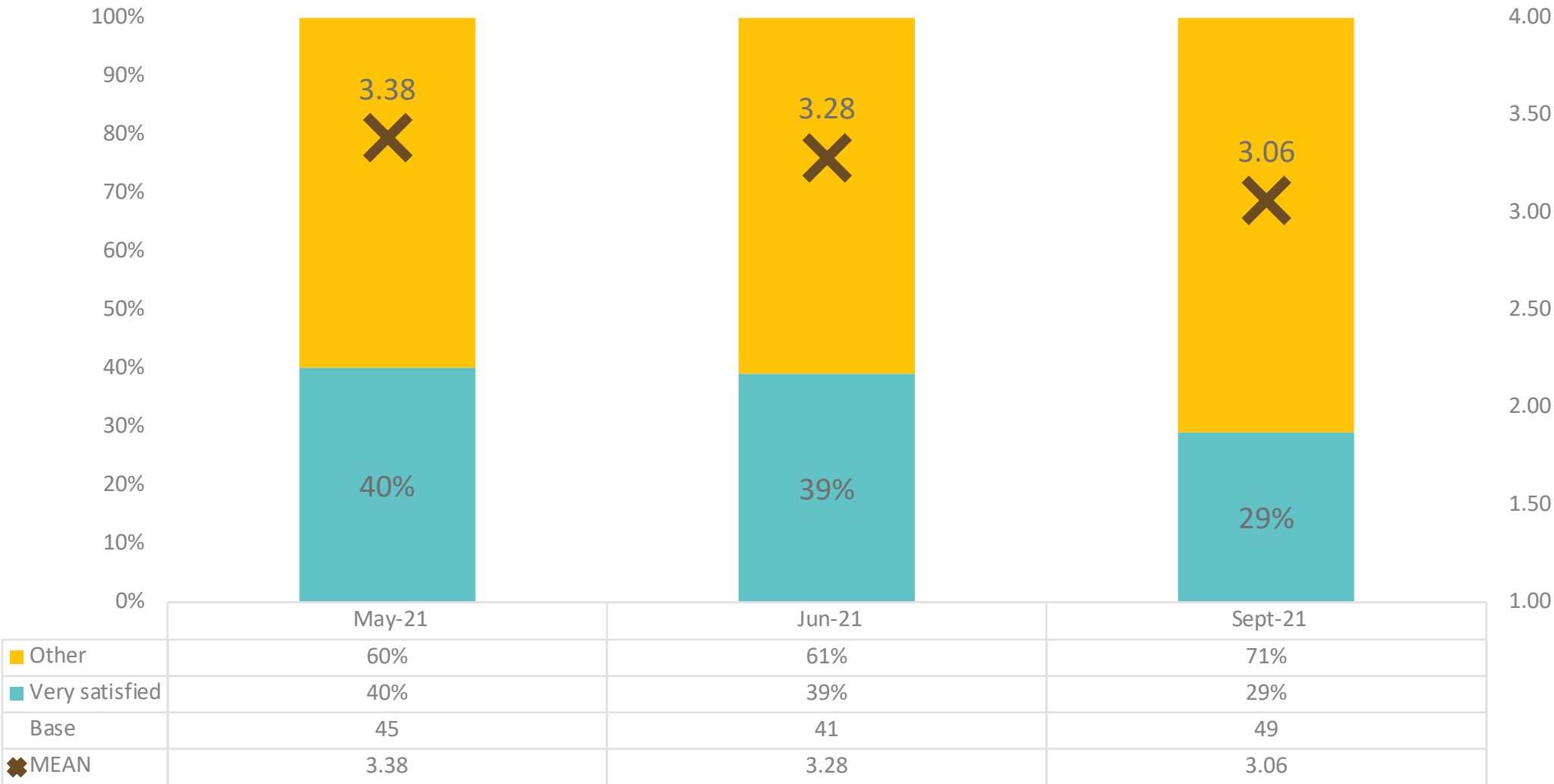
4PT RATING SCALE



Caution
small
base

VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

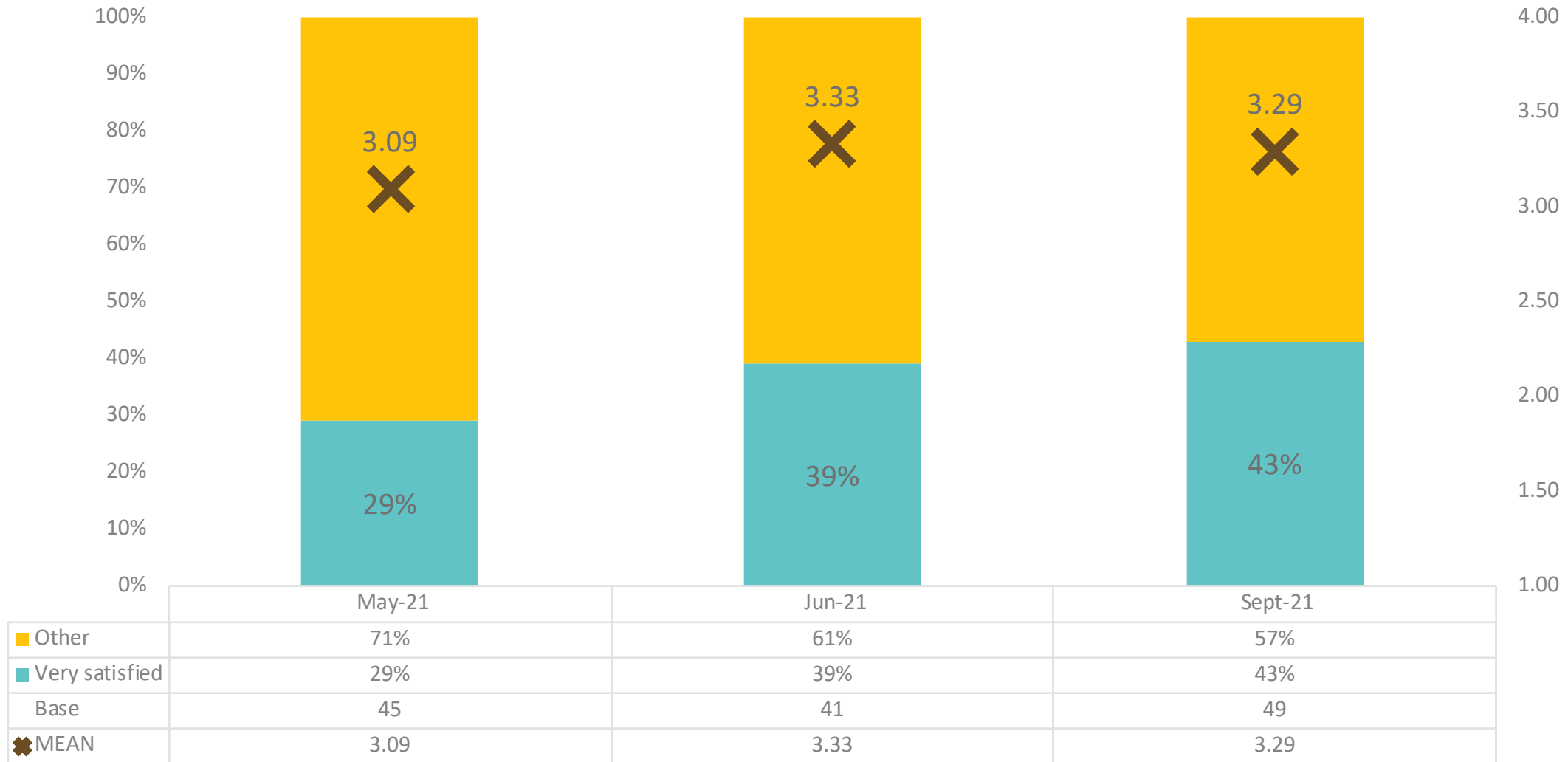


Caution
small
base



VARIETY OF ACTIVITIES – SATISFACTION

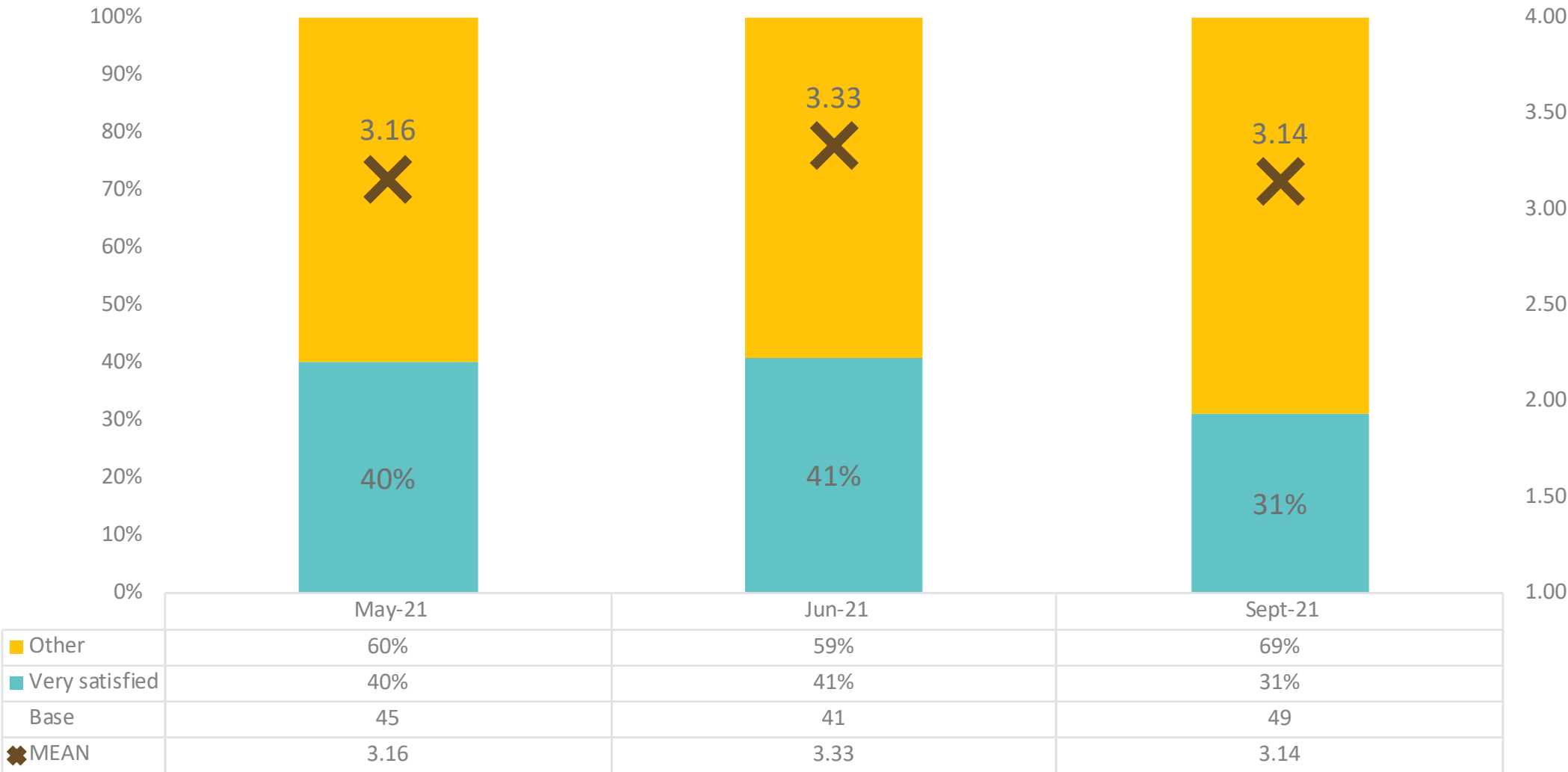
4PT RATING SCALE



Caution
small
base

SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE

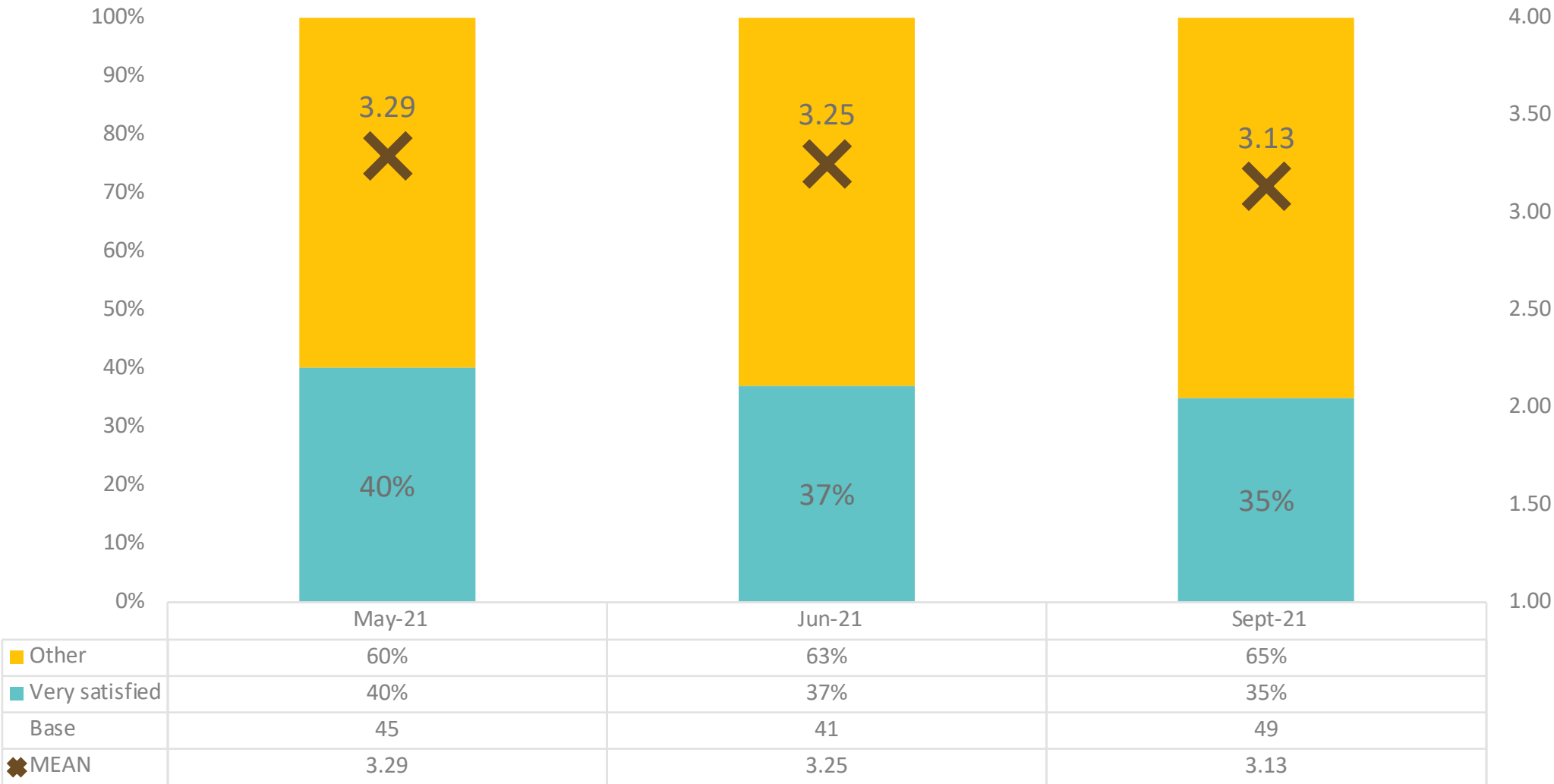


Caution
small
base



OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



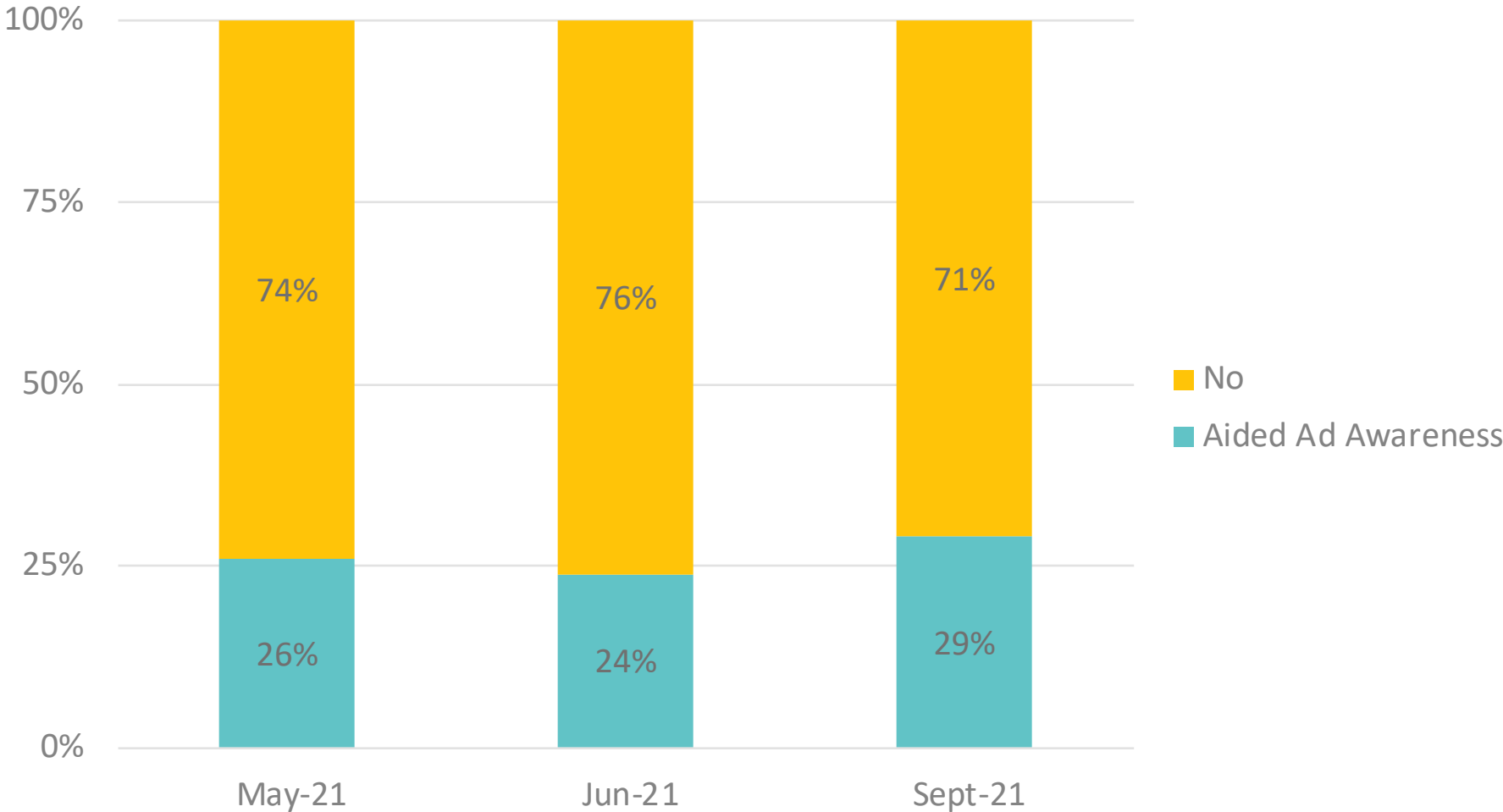


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021	Sept 2021
BASE	45	41	49
<i>Recommendations from family and friends</i>	31%	41%	29%
<i>Social media</i>	16%	20%	8%
<i>Travel guide website</i>	18%	15%	22%
<i>Television</i>	20%	12%	22%
<i>Travel agents</i>	7%	10%	8%
<i>GVB website</i>	7%	-	6%
<i>Other</i>	2%	-	2%
<i>Radio</i>	-	2%	2%



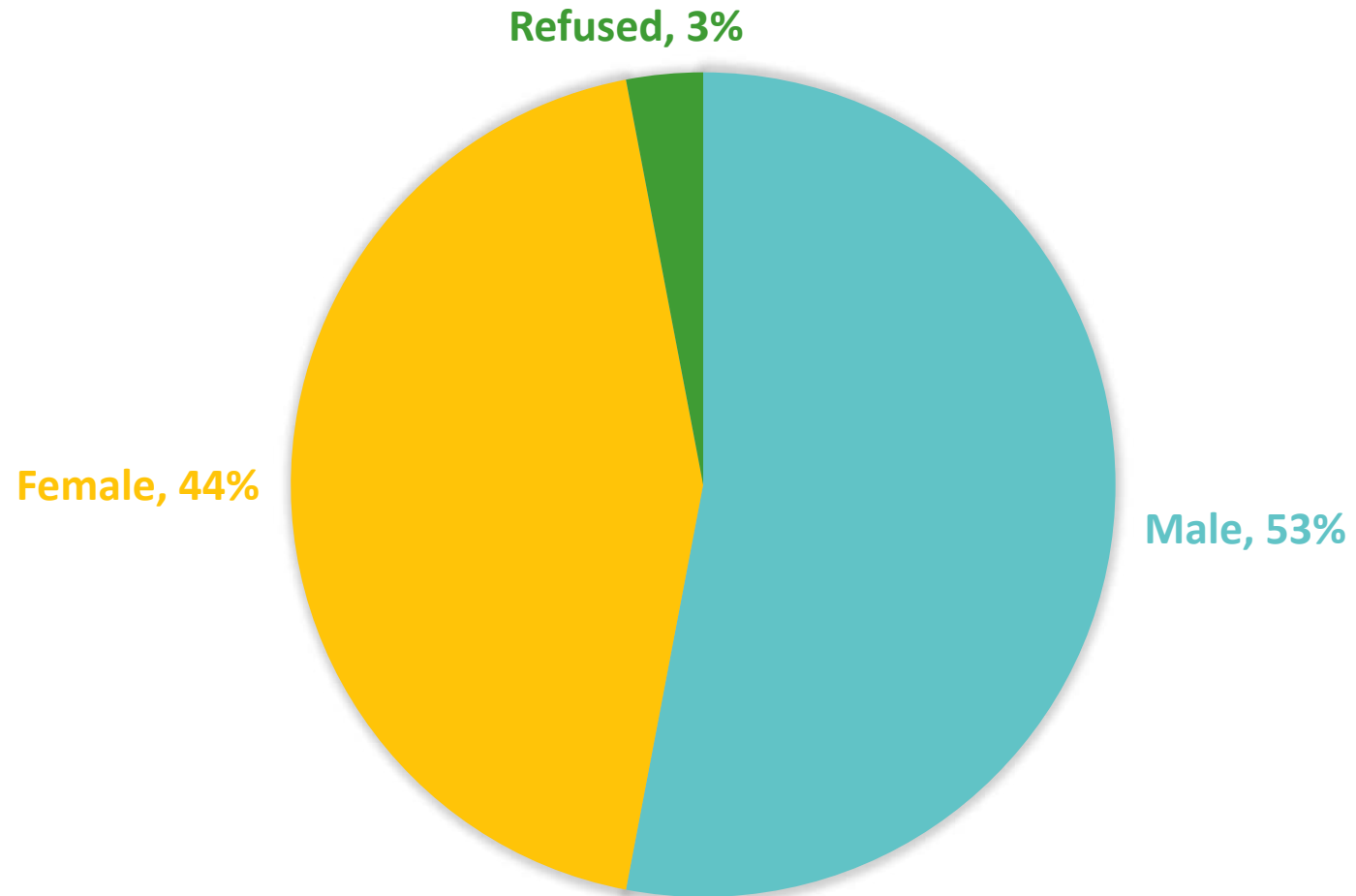


SECTION 5

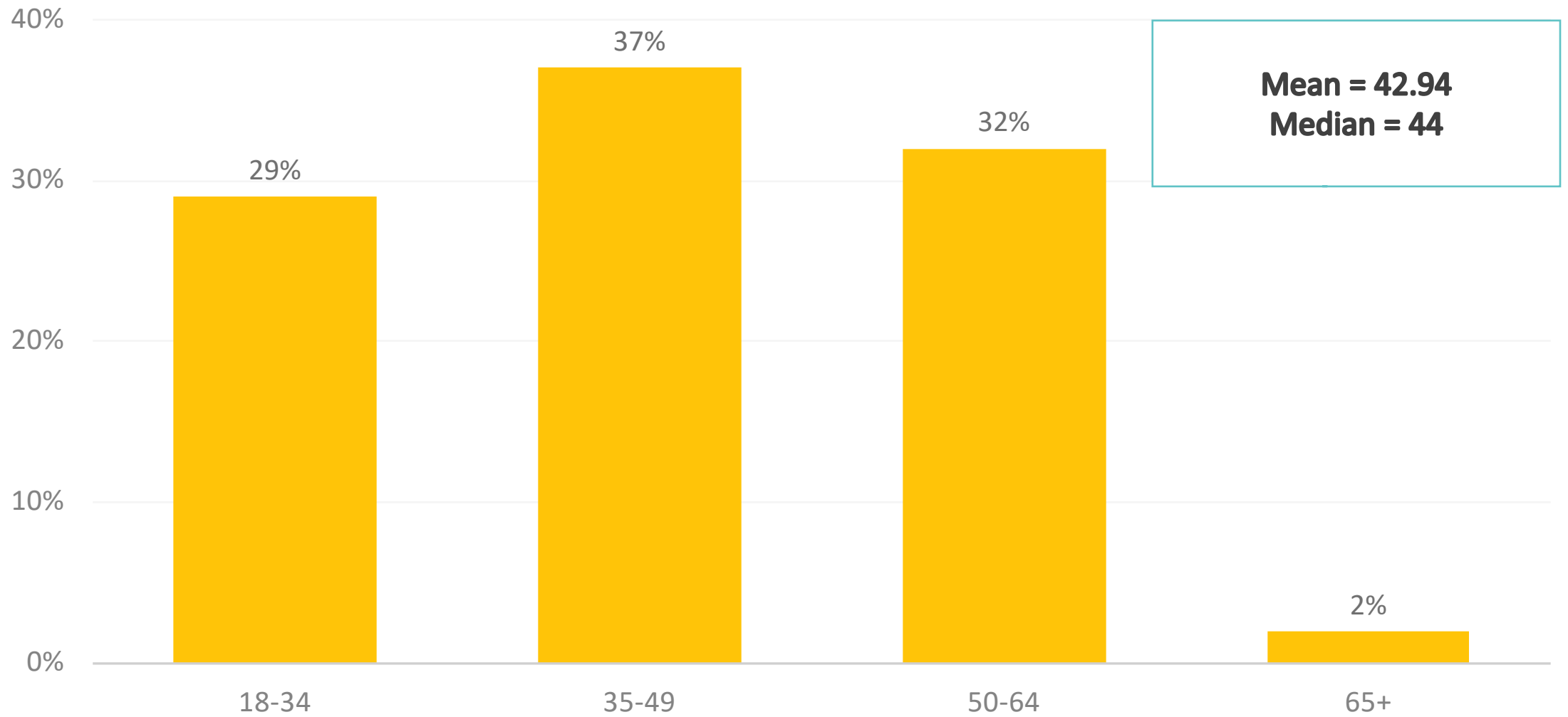
PROFILE OF RESPONDENTS



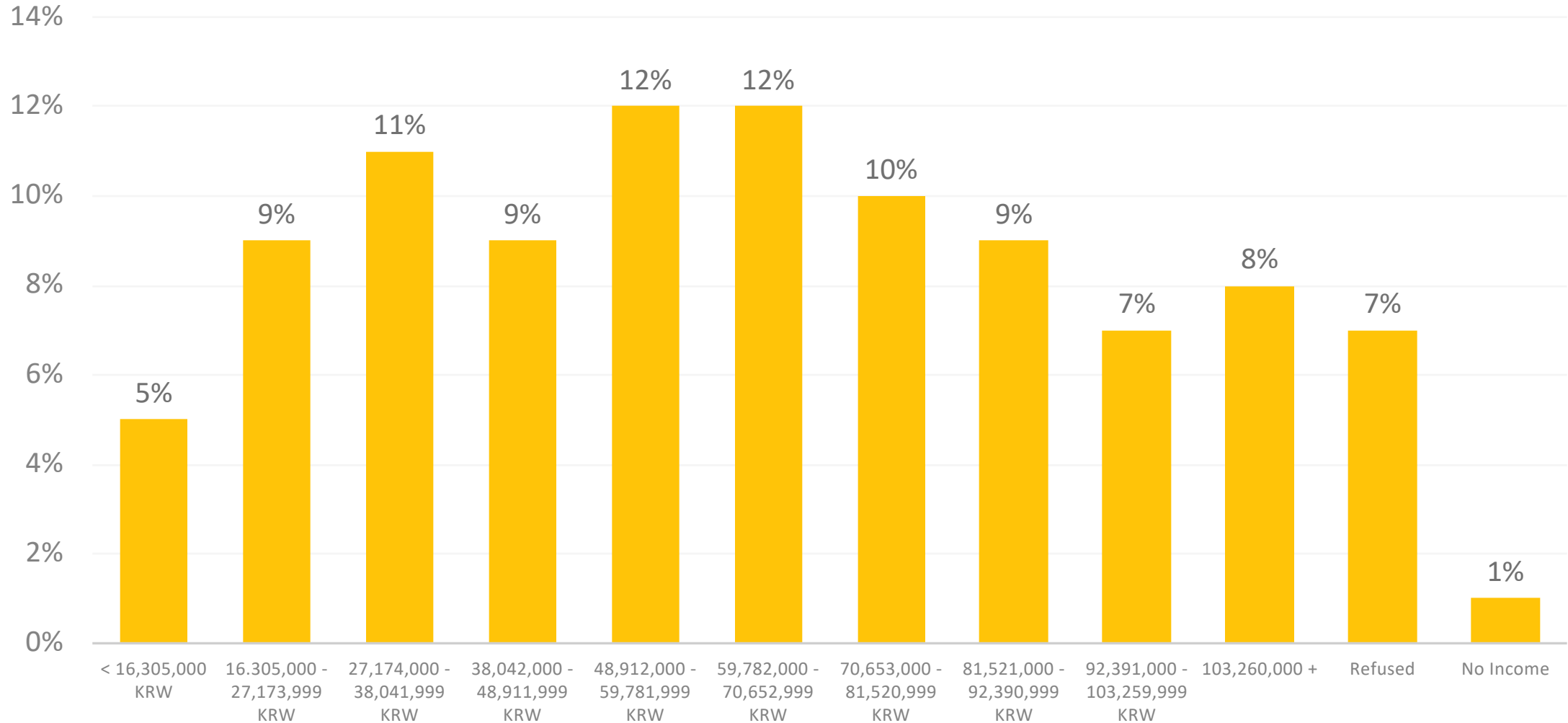
GENDER



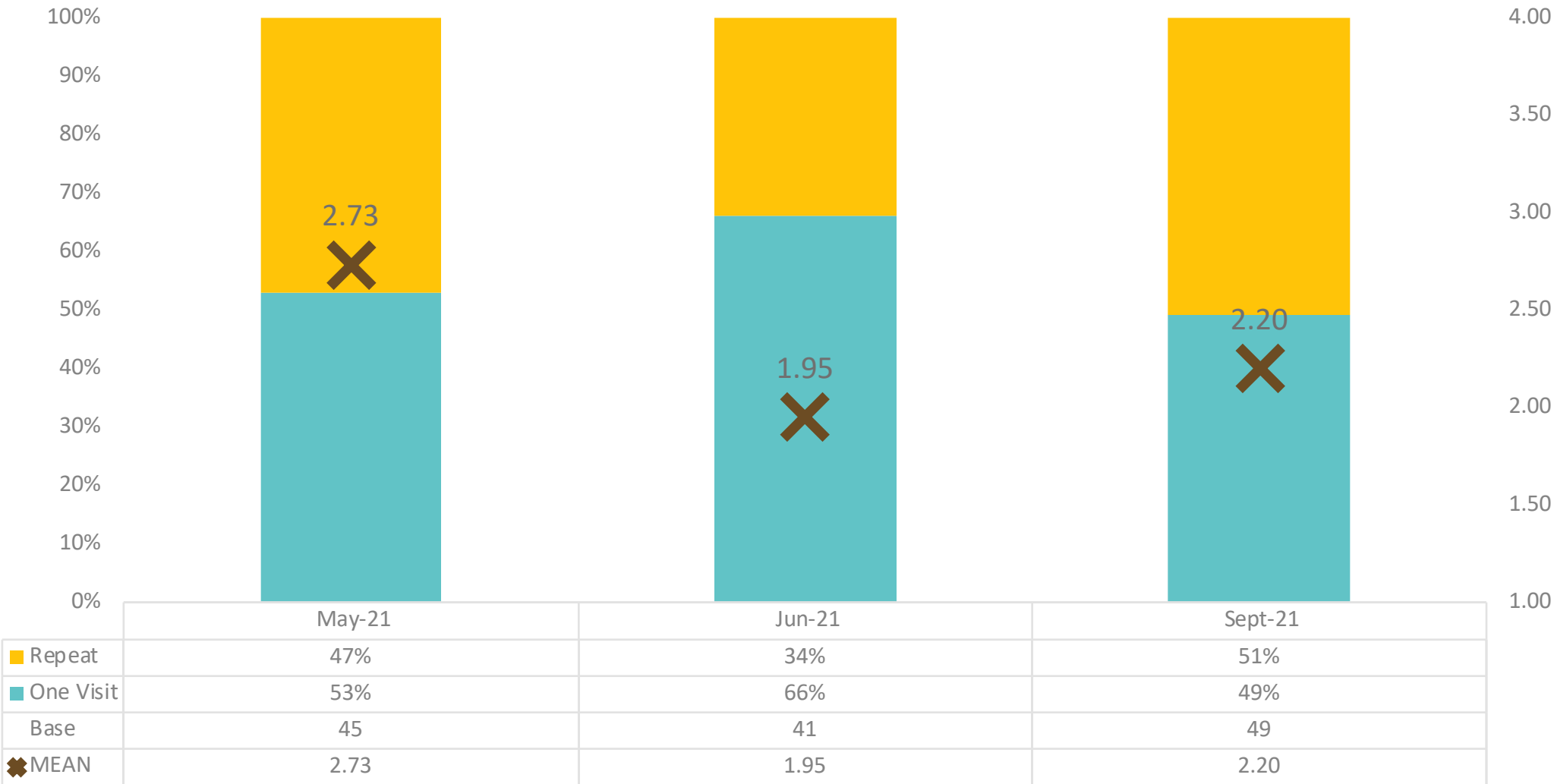
AGE



HOUSEHOLD INCOME



TRIPS TO GUAM



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

