



Guam Visitors Bureau

Taiwan 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: Taiwan.
 - Better understand motivations to travel internationally.
 - Gauge perceptions of and satisfaction with Guam as a destination.
- Anthology and Guam Visitors Bureau research staff collaboratively developed the questionnaire, which was translated into Traditional Chinese.



Methodology

- Anthology Research conducted a self-administered online survey of residents of Taiwan, utilizing sample provided by a reputable online sample provider. All surveys were presented in Traditional Chinese, with the option to view the survey in English. Participants were screened to include only those residents who have traveled internationally for 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 302 surveys were collected during this period.
- The margin of error for a sample of 302 is +/- 5.64 percentage points with a 95% confidence level. That is, if all Taiwan residents in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.64 percentage points.



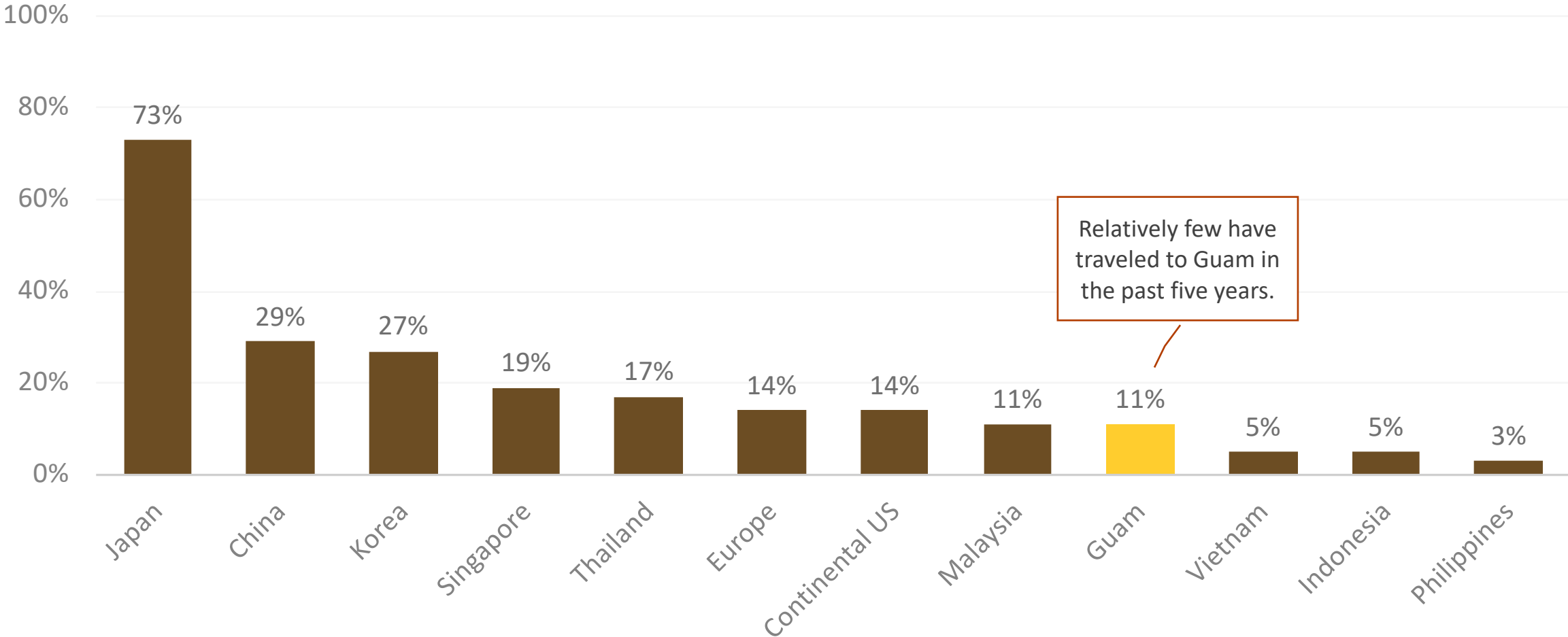


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



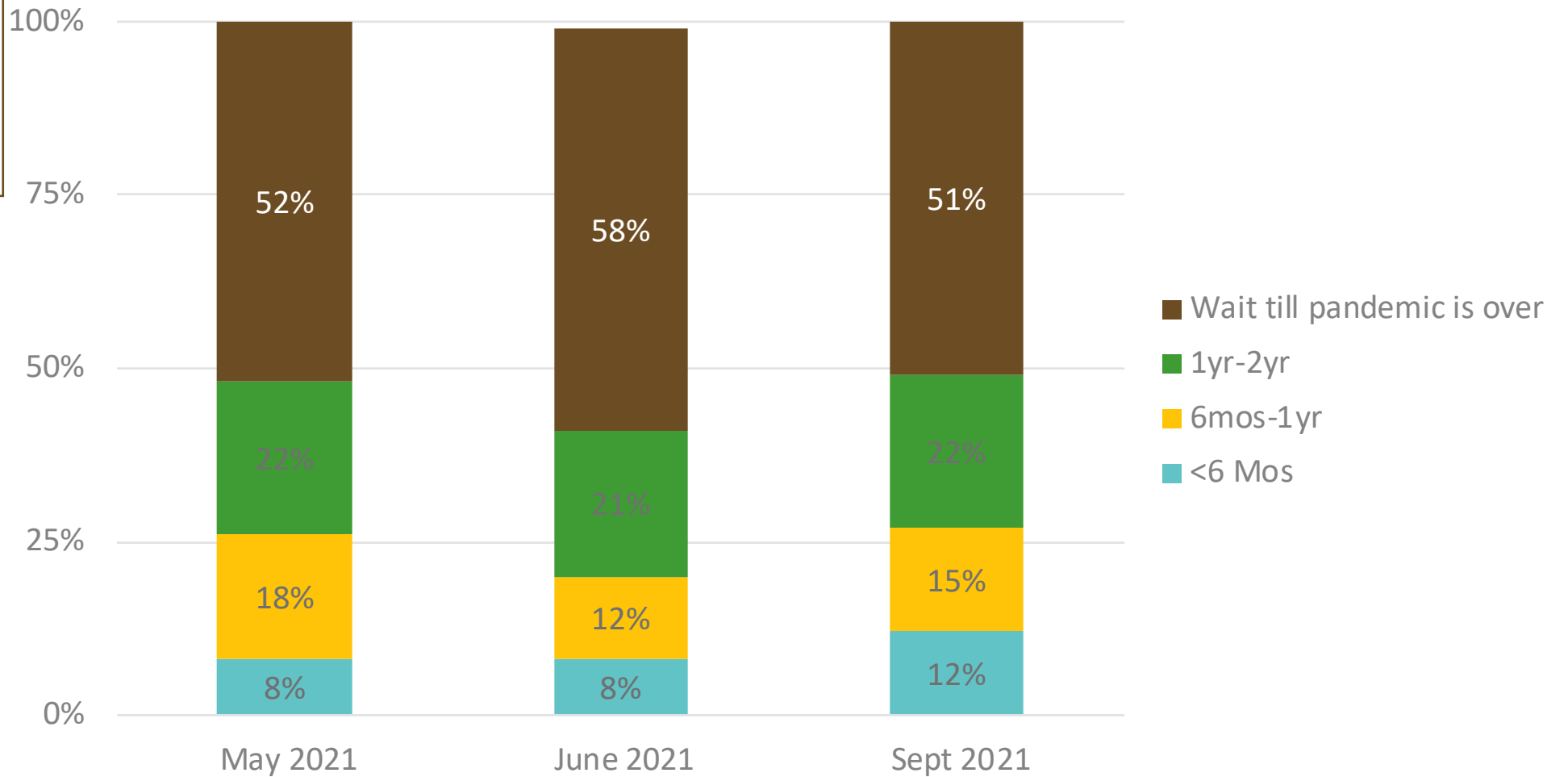
TRAVEL HISTORY

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

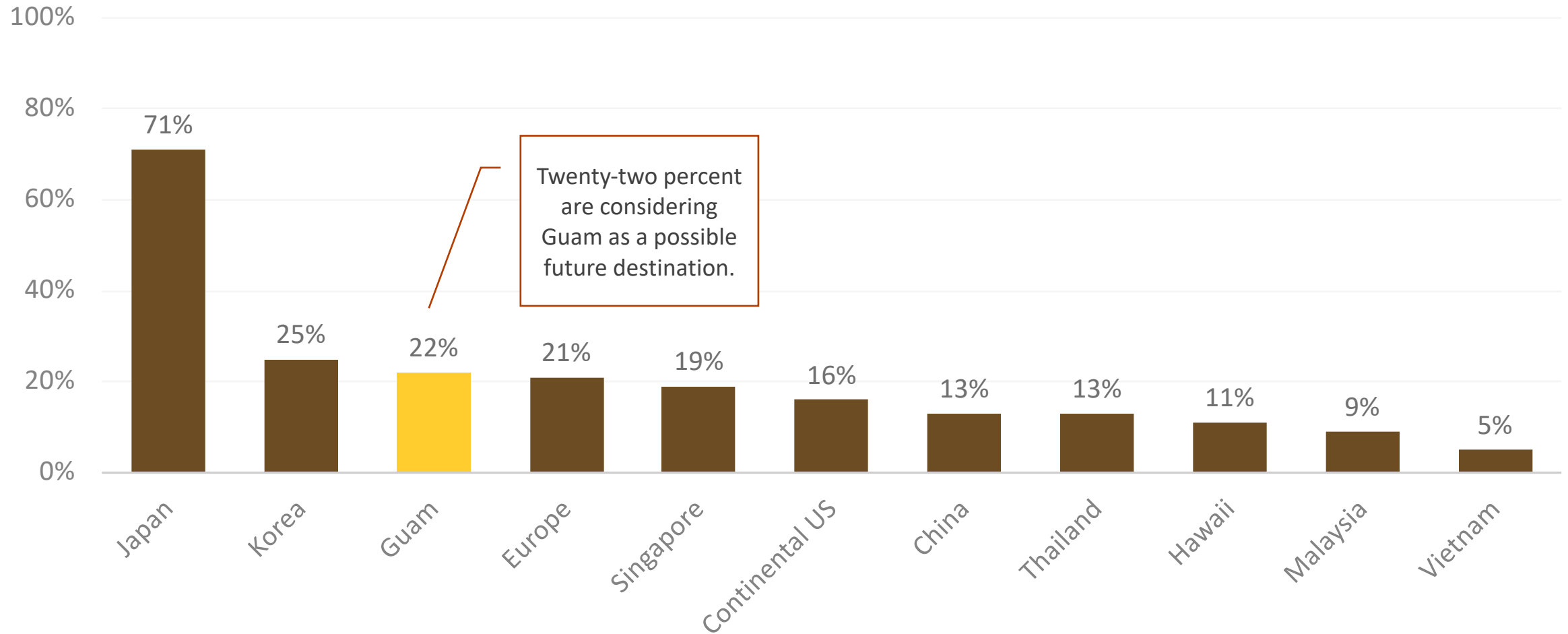


FUTURE TRAVEL PLANS

At least half of those polled do not intend to travel internationally until the pandemic is over.



POTENTIAL FUTURE TRAVEL DESTINATIONS

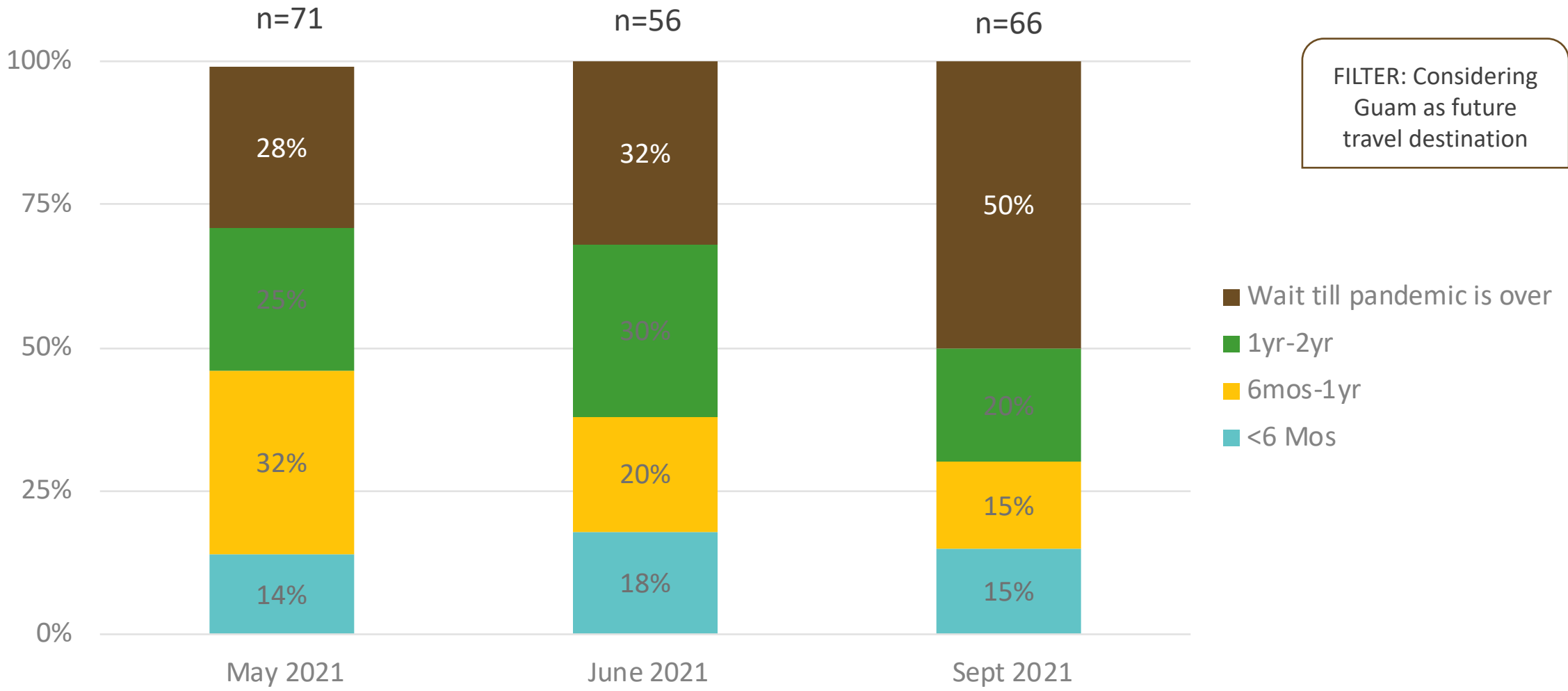


POTENTIAL FUTURE TRAVEL DESTINATIONS

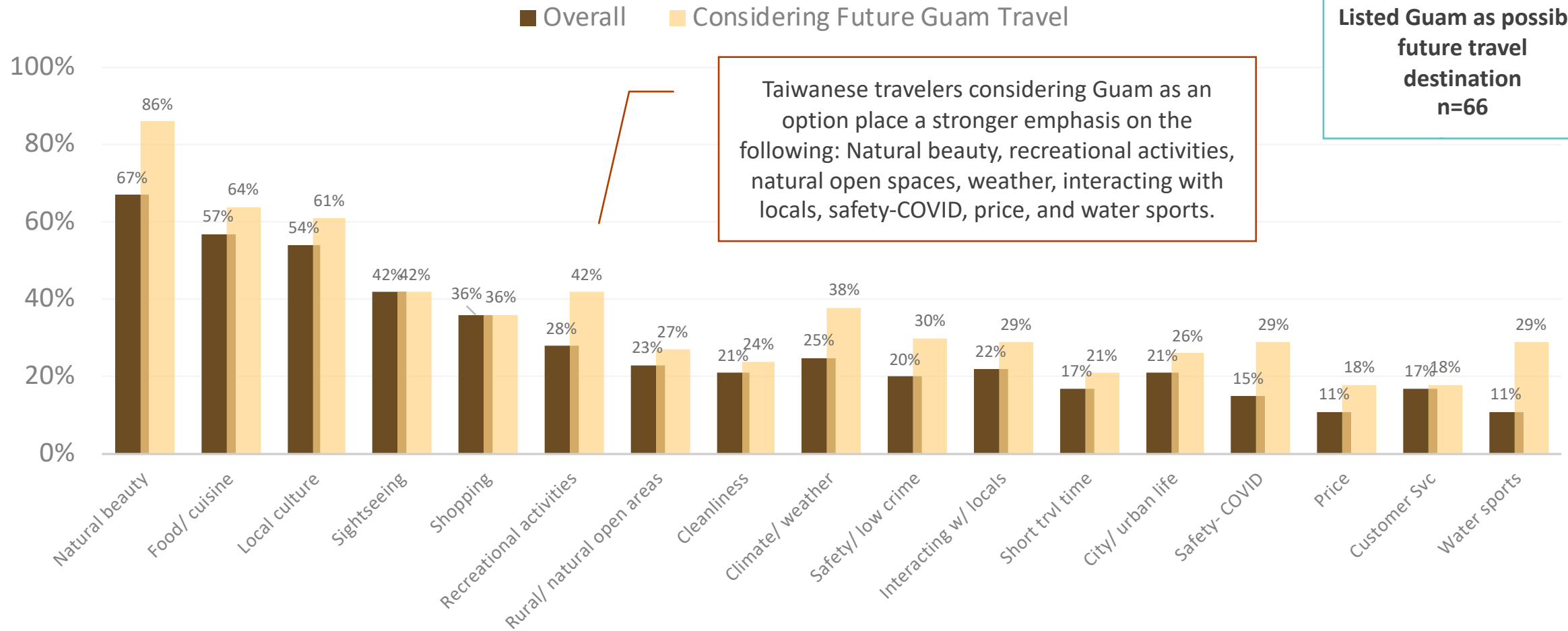
	May 2021	June 2021	Sept 2021
Japan	71%	70%	71%
Korea	23%	25%	25%
Guam	23%	18%	22%
Europe	17%	22%	21%
Singapore	18%	19%	19%
Continental U.S.	14%	13%	16%
Thailand	17%	15%	13%
China	21%	22%	13%
Hawaii	12%	14%	11%
Malaysia	11%	9%	9%
Vietnam	8%	9%	5%



TIMING OF FUTURE TRAVEL TO GUAM



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

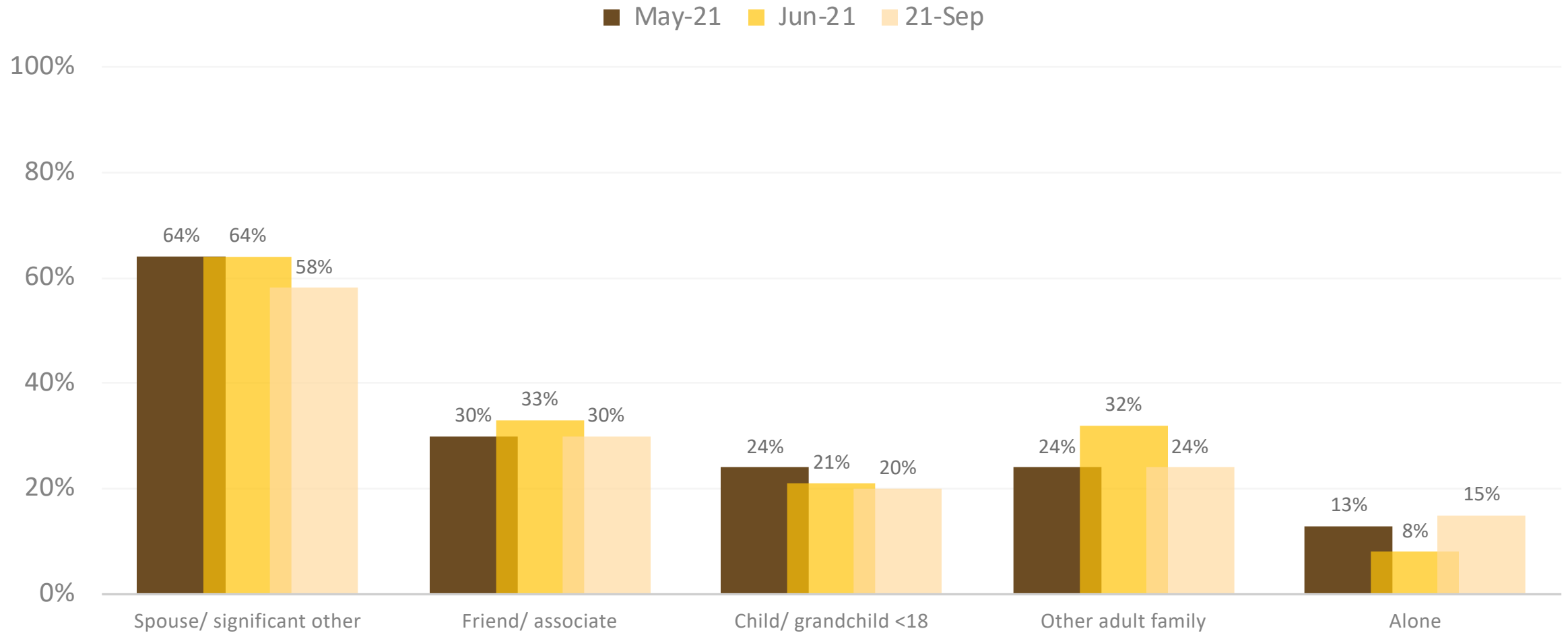


APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

	May 2021	June 2021	Sept 2021
Natural beauty	71%	72%	67%
Food/ cuisine	61%	63%	57%
Local culture	55%	57%	54%
Sightseeing/ tourist spots	47%	52%	42%
Shopping	44%	44%	36%
Recreational activities	32%	32%	28%
Climate/ weather	26%	25%	25%
Rural/ open spaces	27%	31%	23%
Interacting w/ locals	25%	22%	22%
Cleanliness	28%	25%	21%
City/ urban life	20%	22%	21%
Safety/ low crime	21%	23%	20%
Short travel distance	20%	22%	17%
Customer service	18%	14%	17%
Safety- COVID	17%	22%	15%
Price	15%	15%	11%
Water sports	12%	9%	11%



FUTURE INTERNATIONAL TRAVEL PARTY



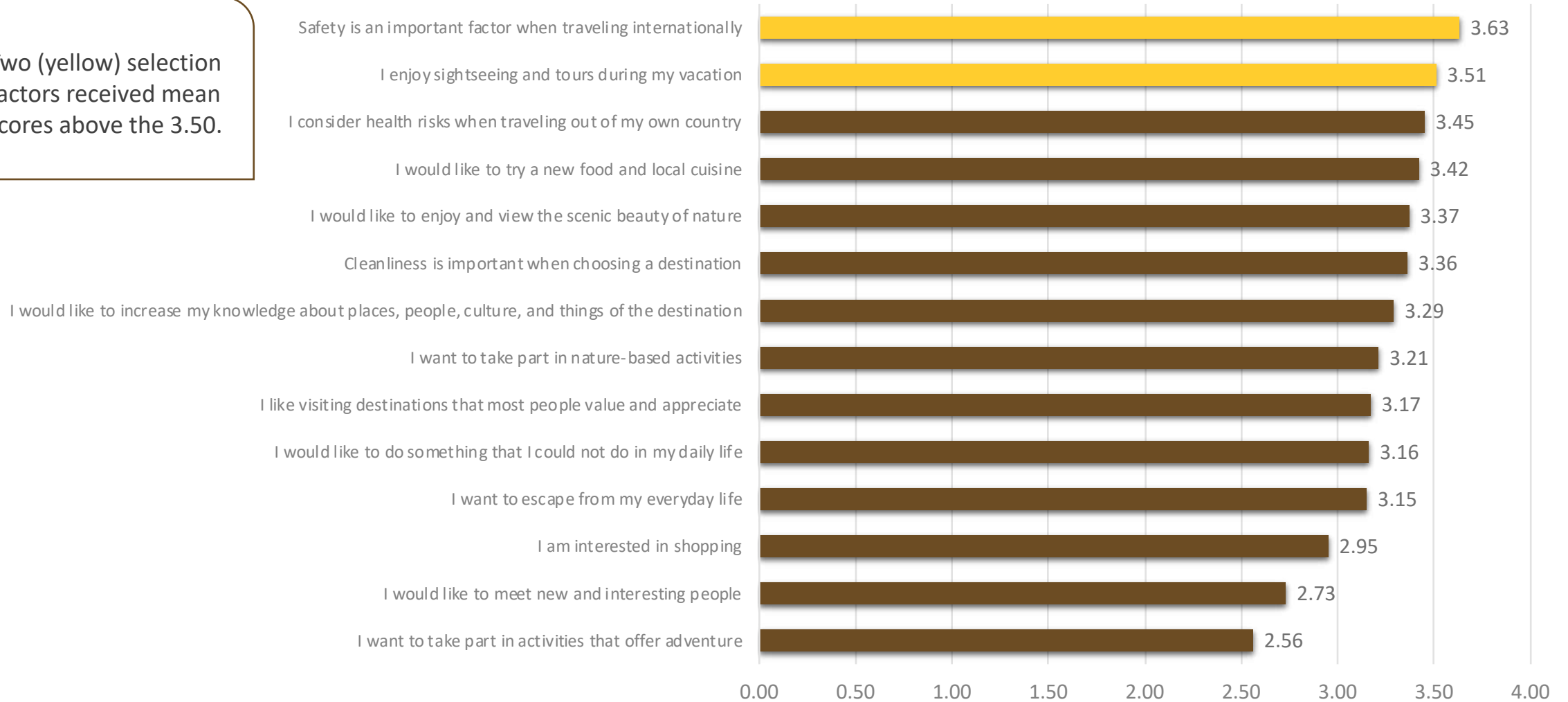
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

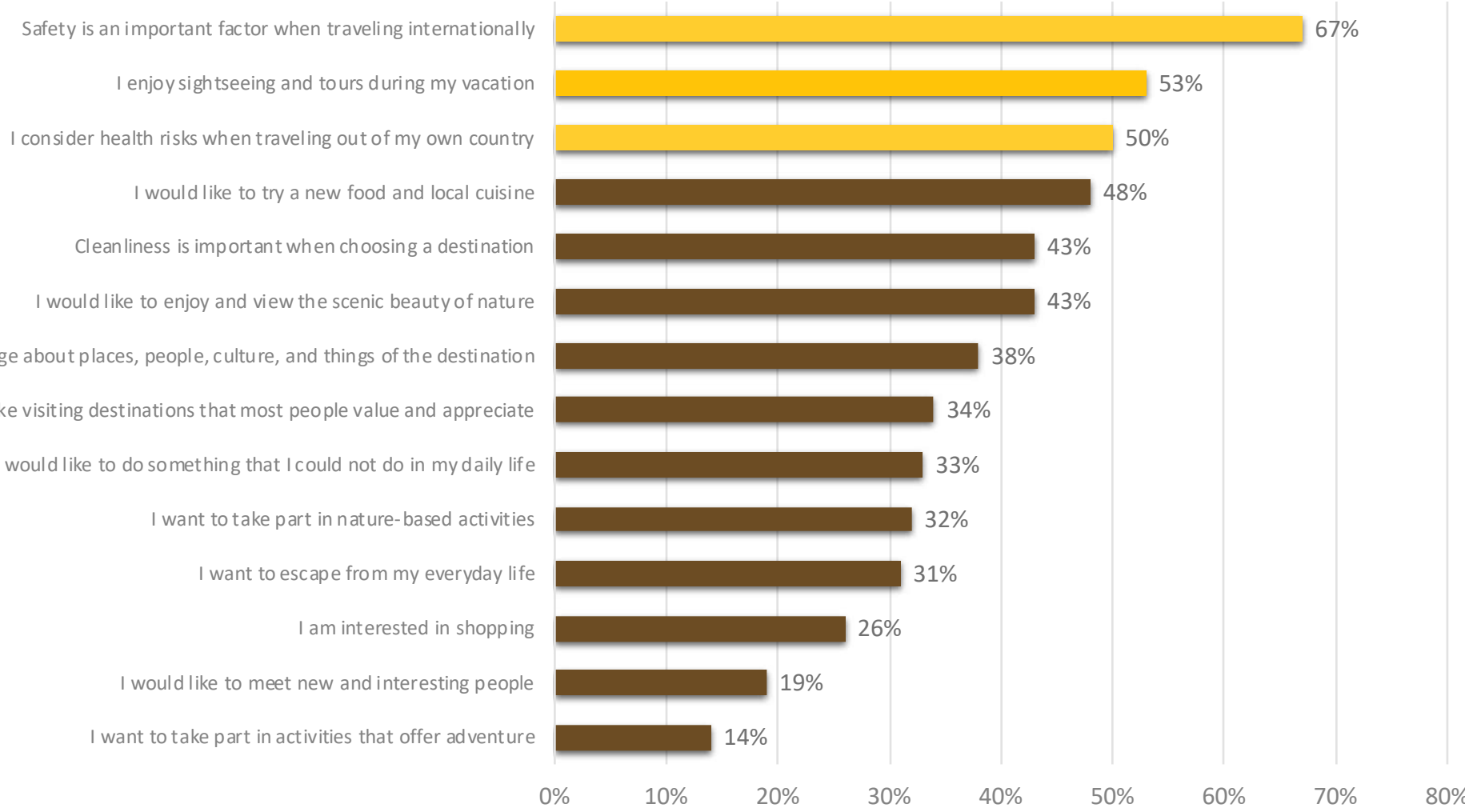
MEAN SCORE 4PT SCALE

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

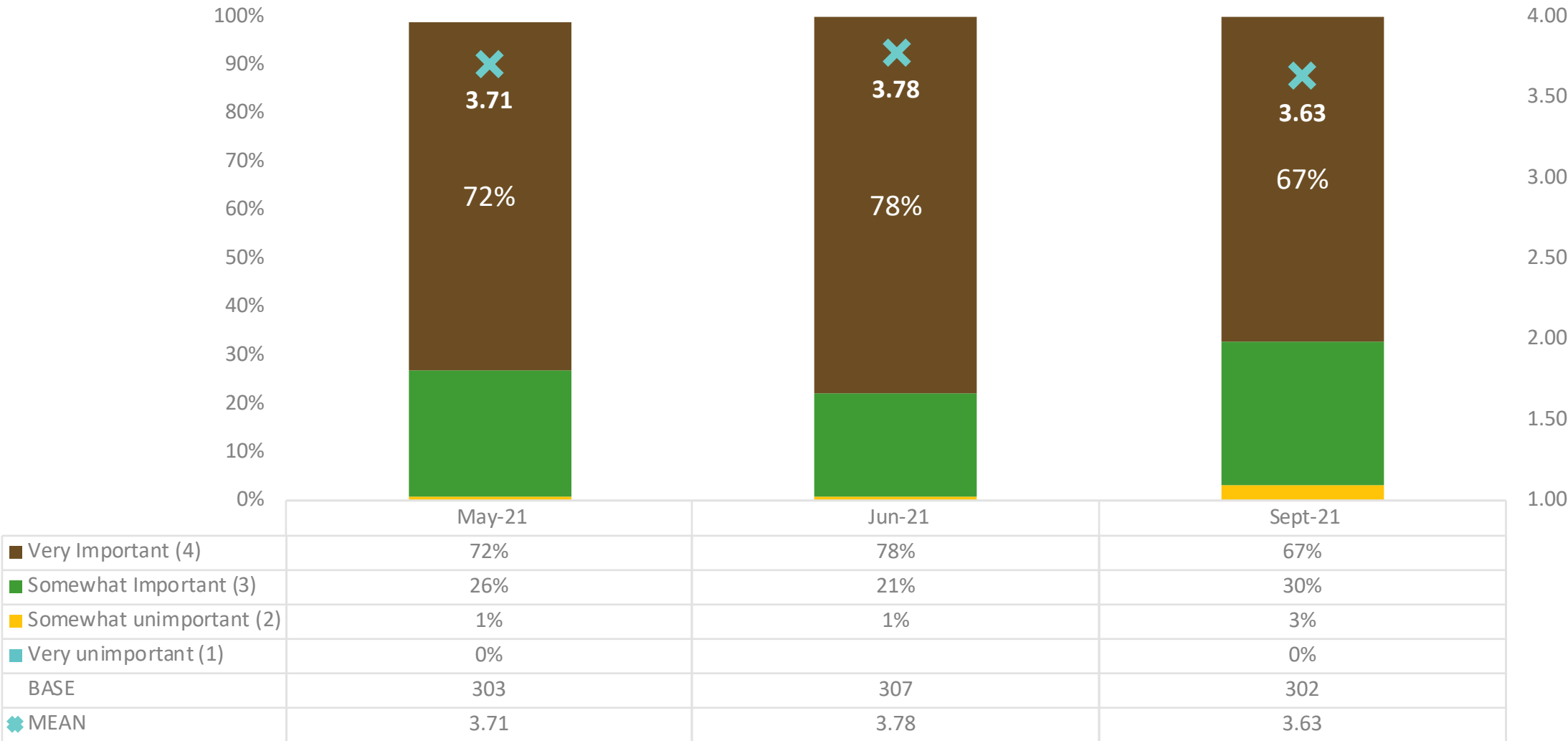


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

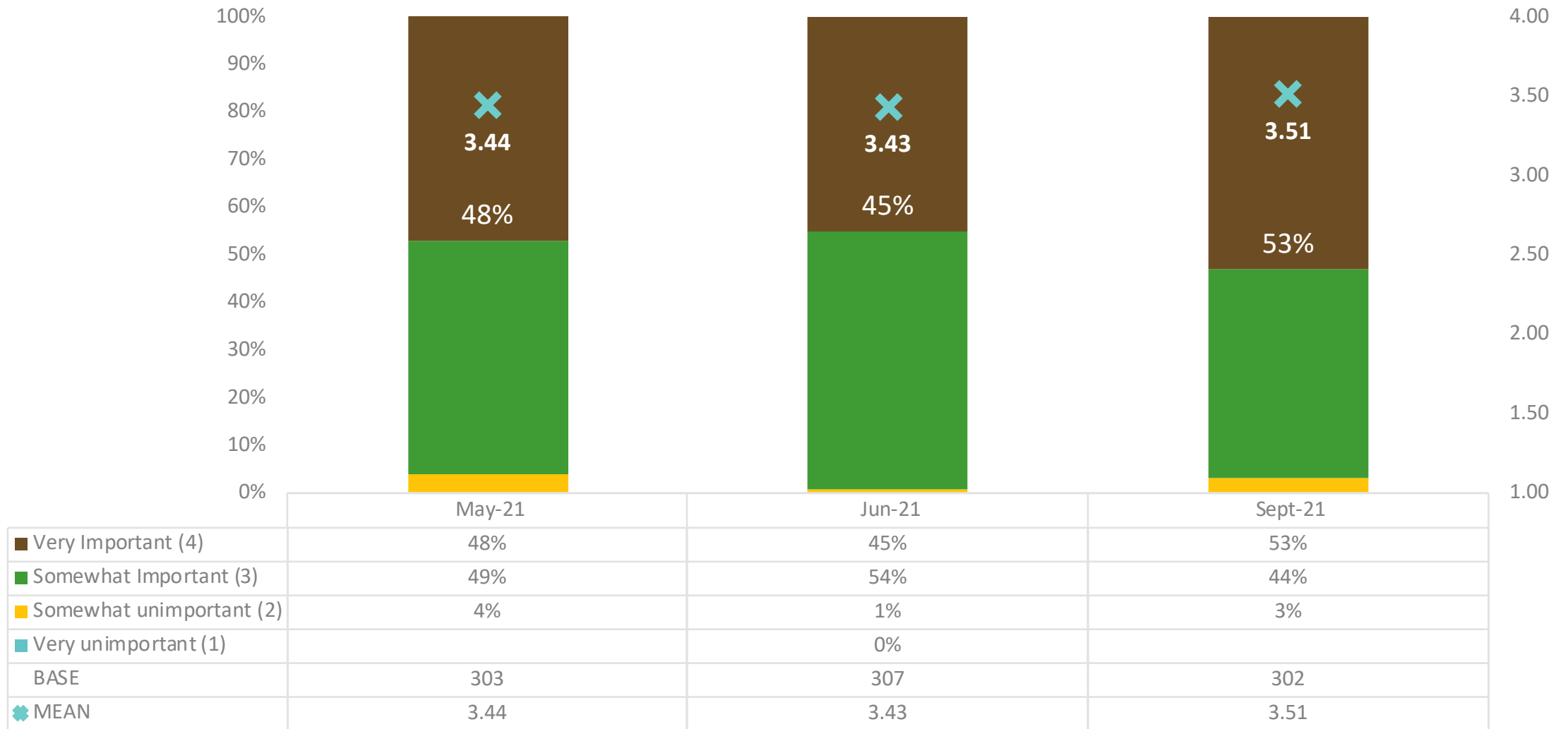
Three (yellow) selection factors received top box (very important) scores above 50%



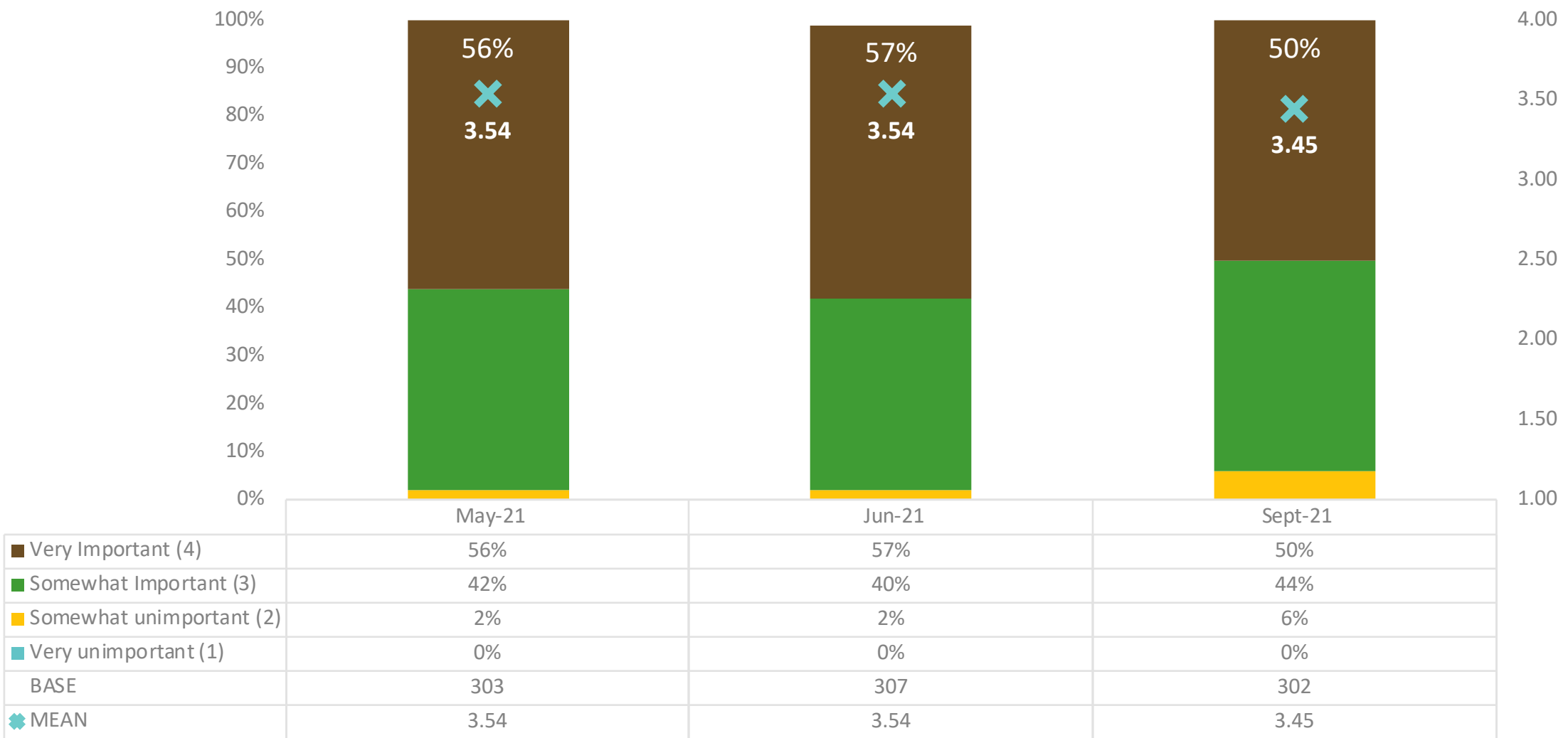
Safety is an important factor when traveling internationally



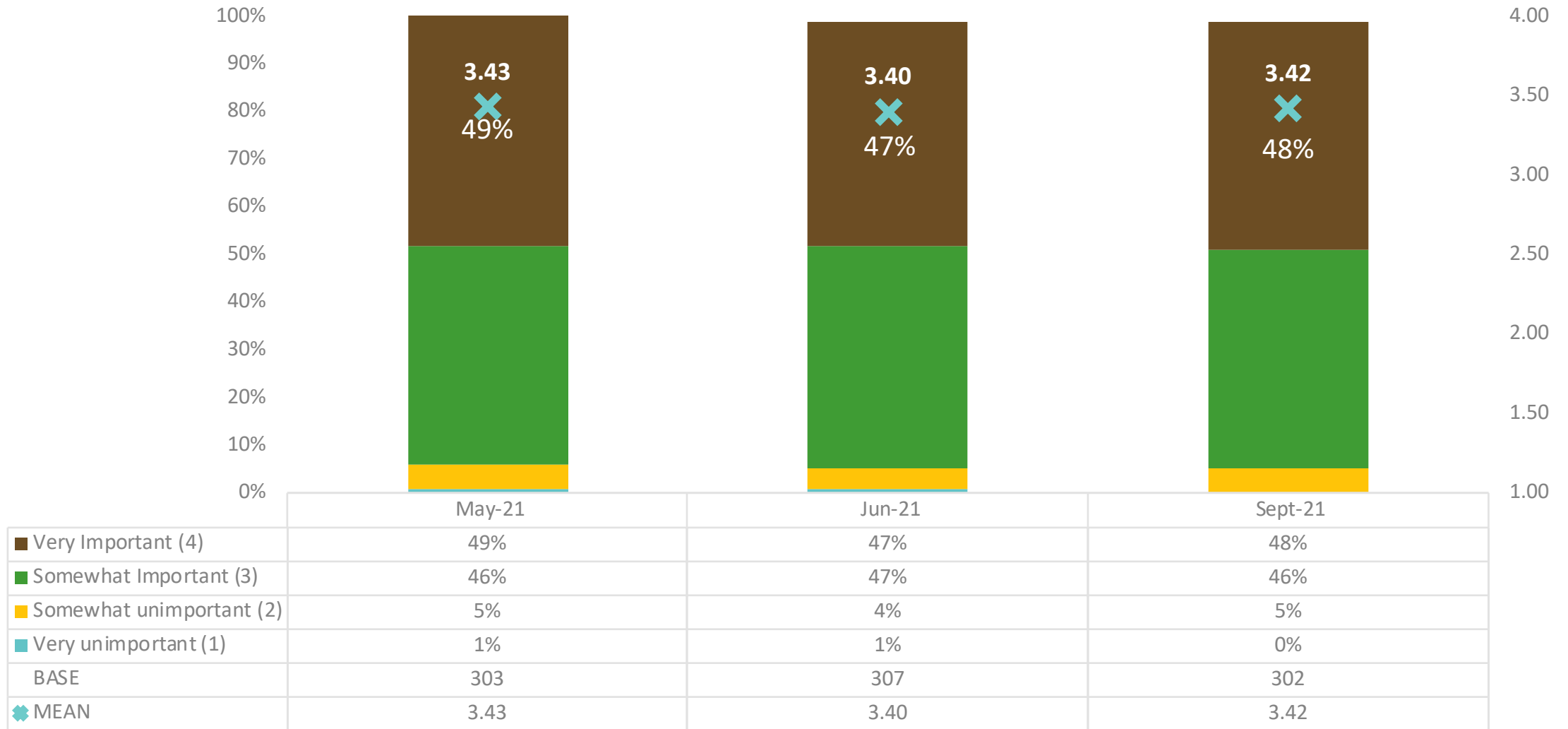
I enjoy sightseeing and tours during my vacation



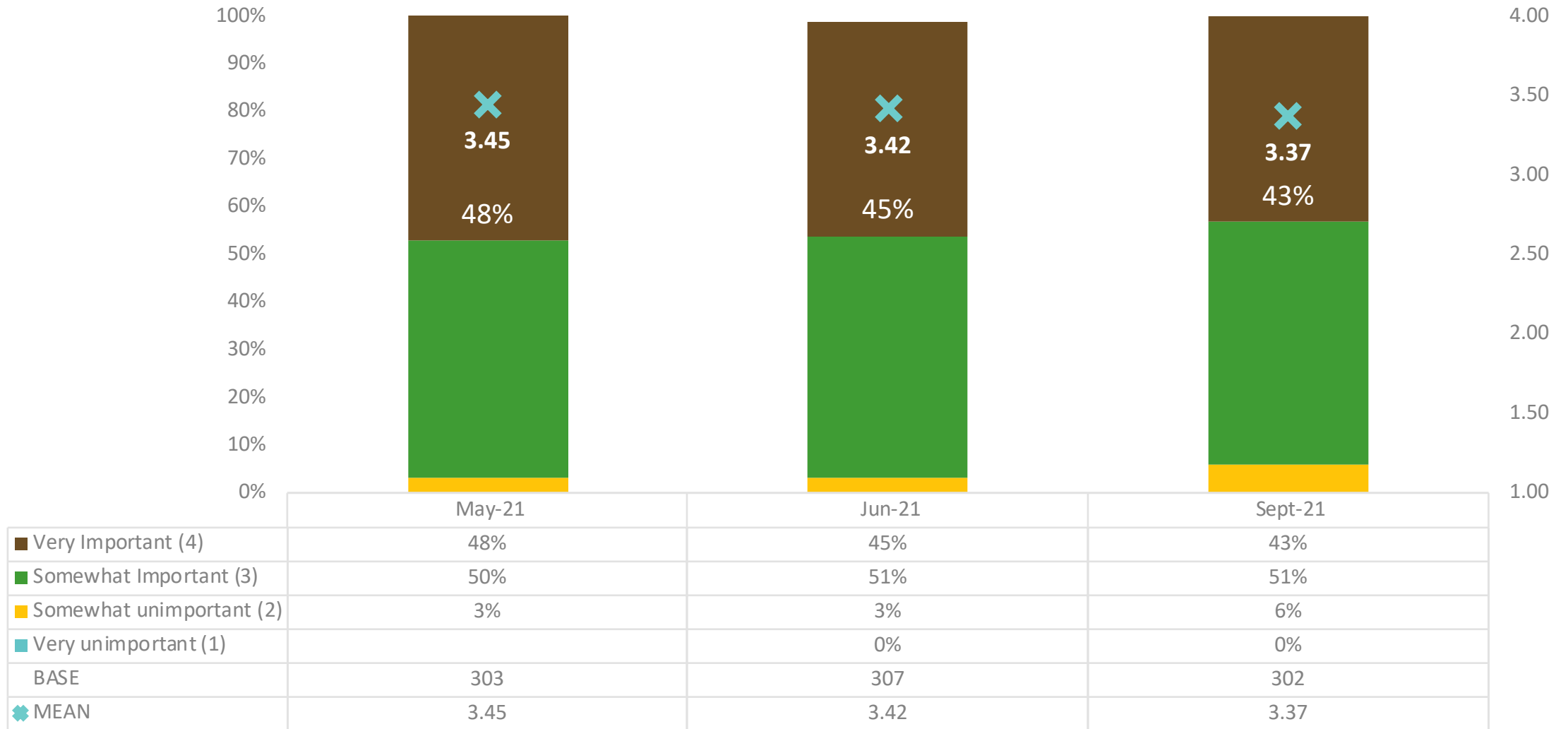
I consider health risks when traveling out of my own country



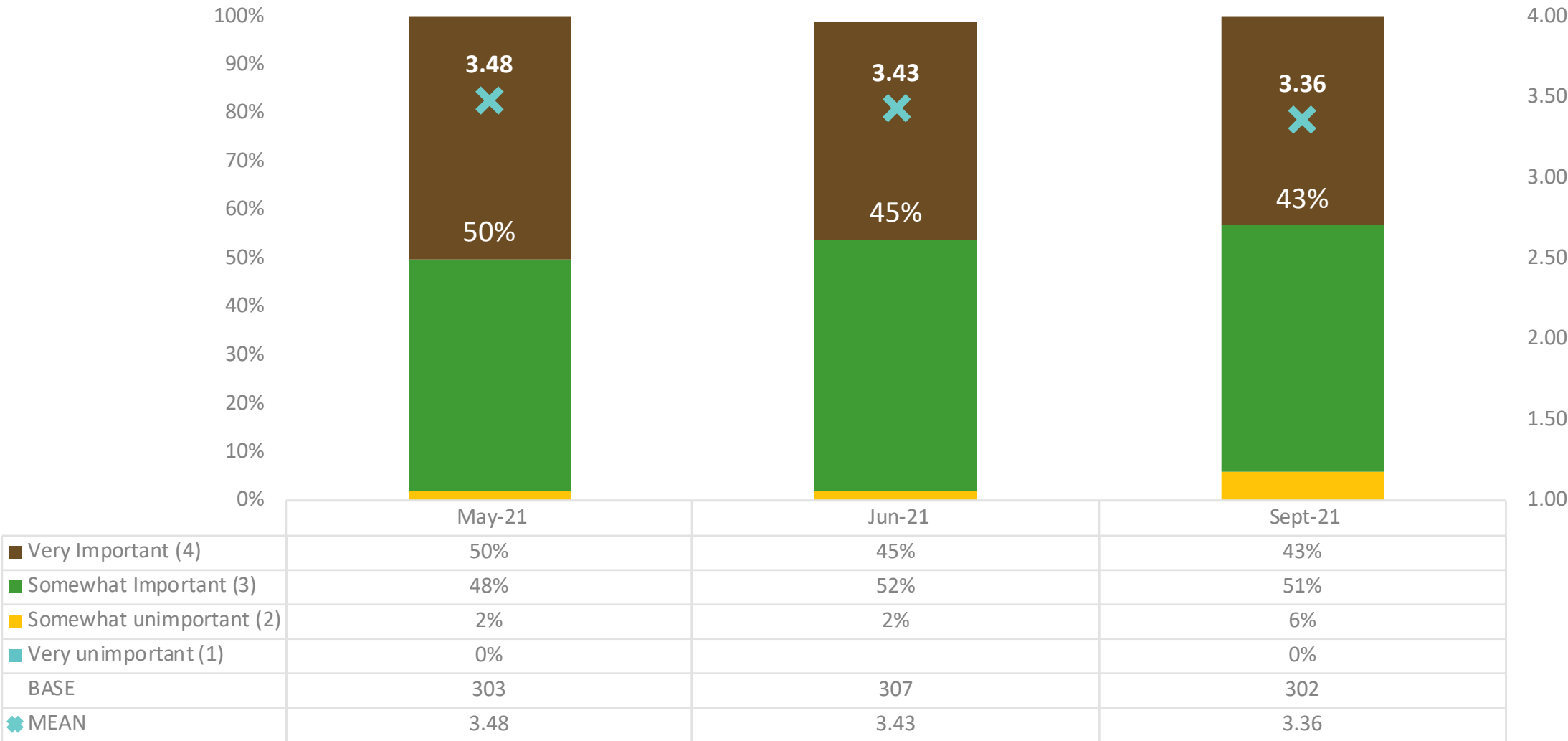
I would like to try a new food and local cuisine



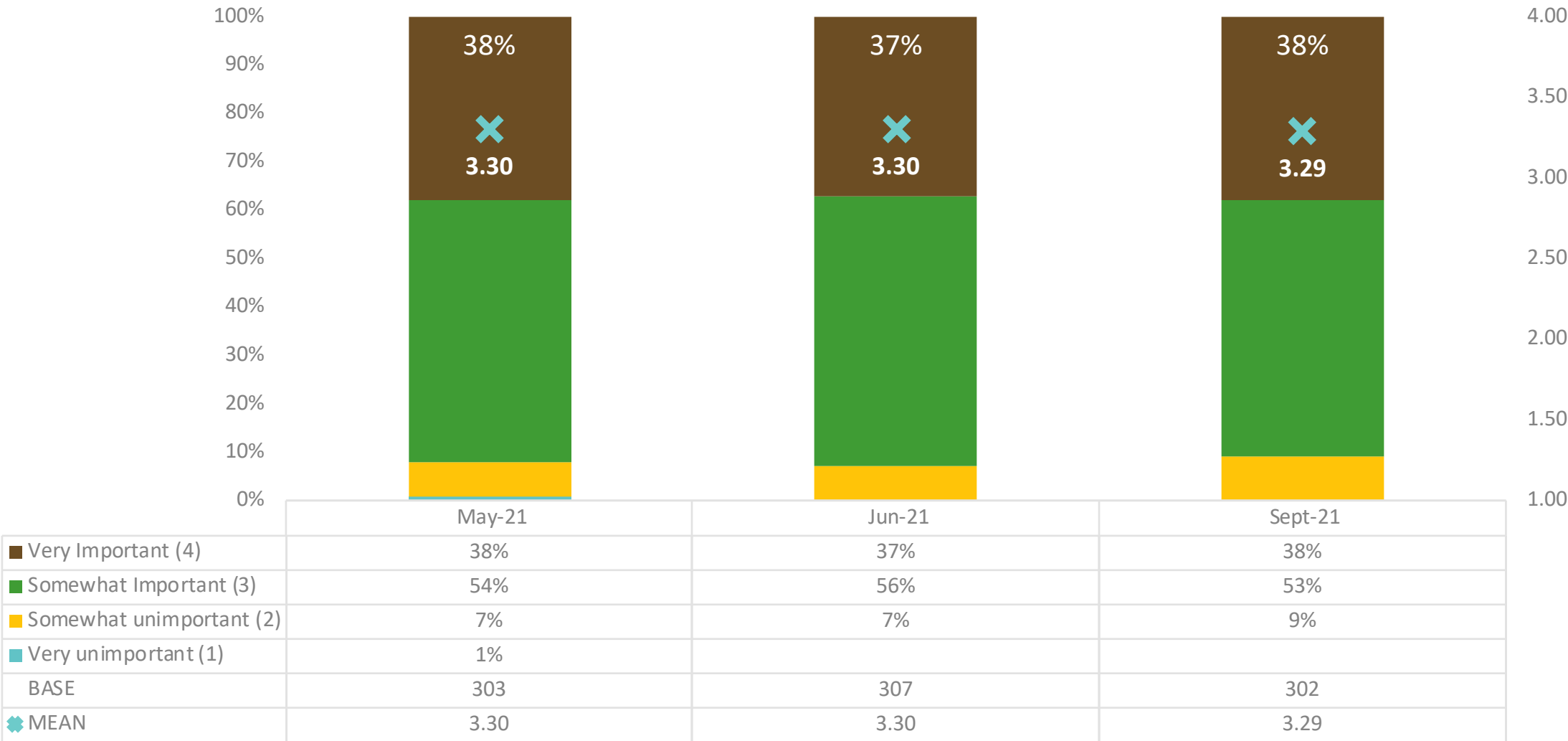
I would like to enjoy and view the scenic beauty of nature



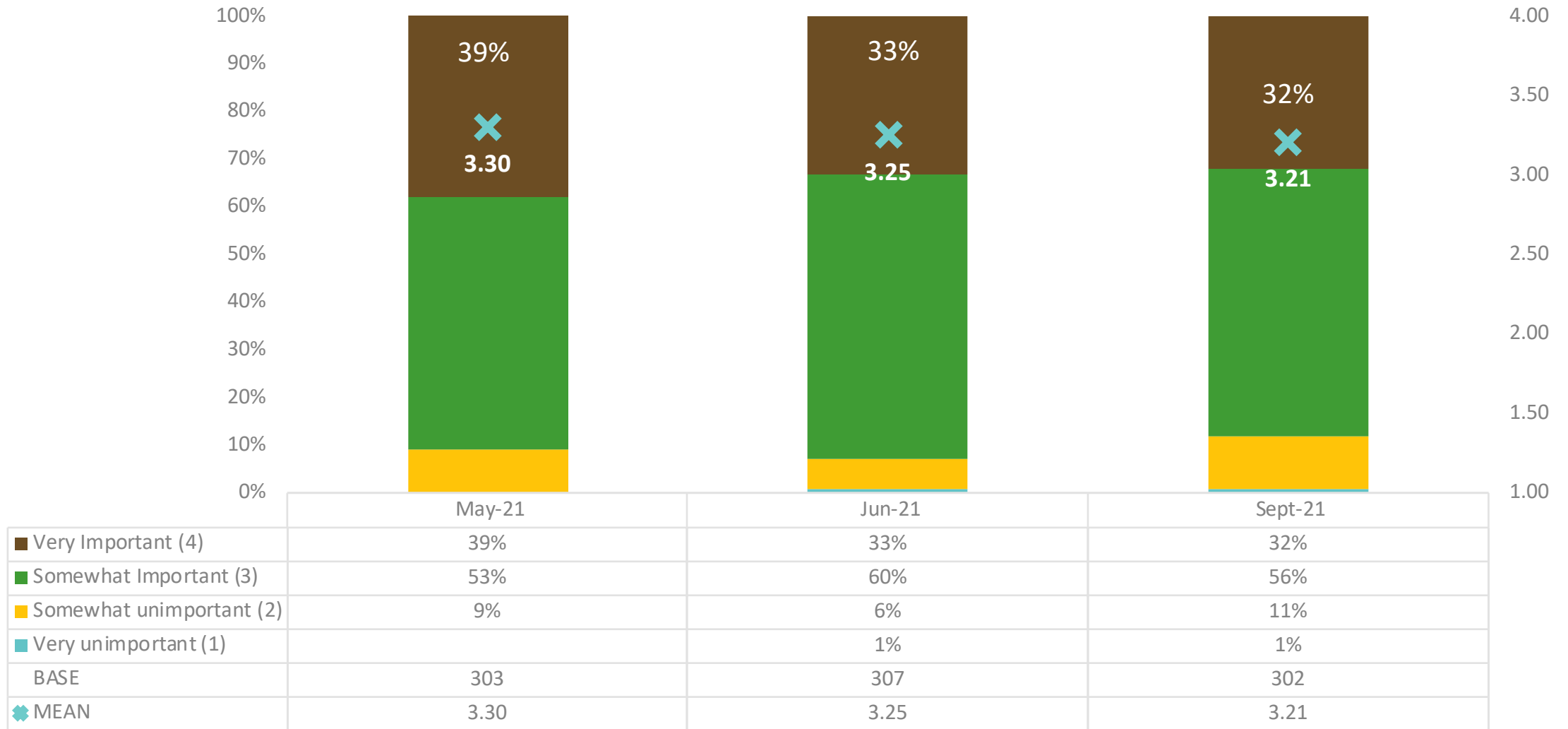
Cleanliness is important when choosing a destination



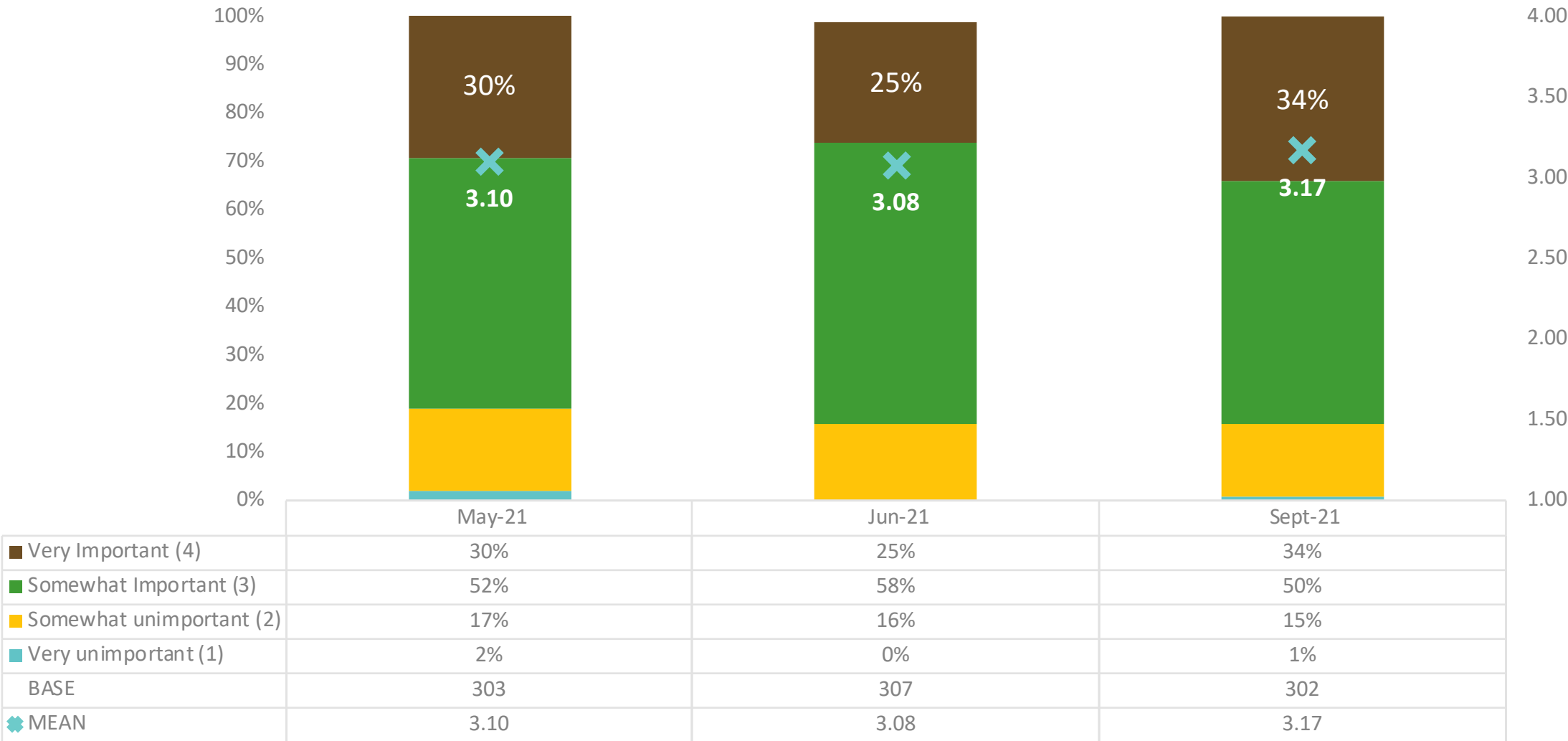
I would like to increase my knowledge about places, people, culture, and things of the destination



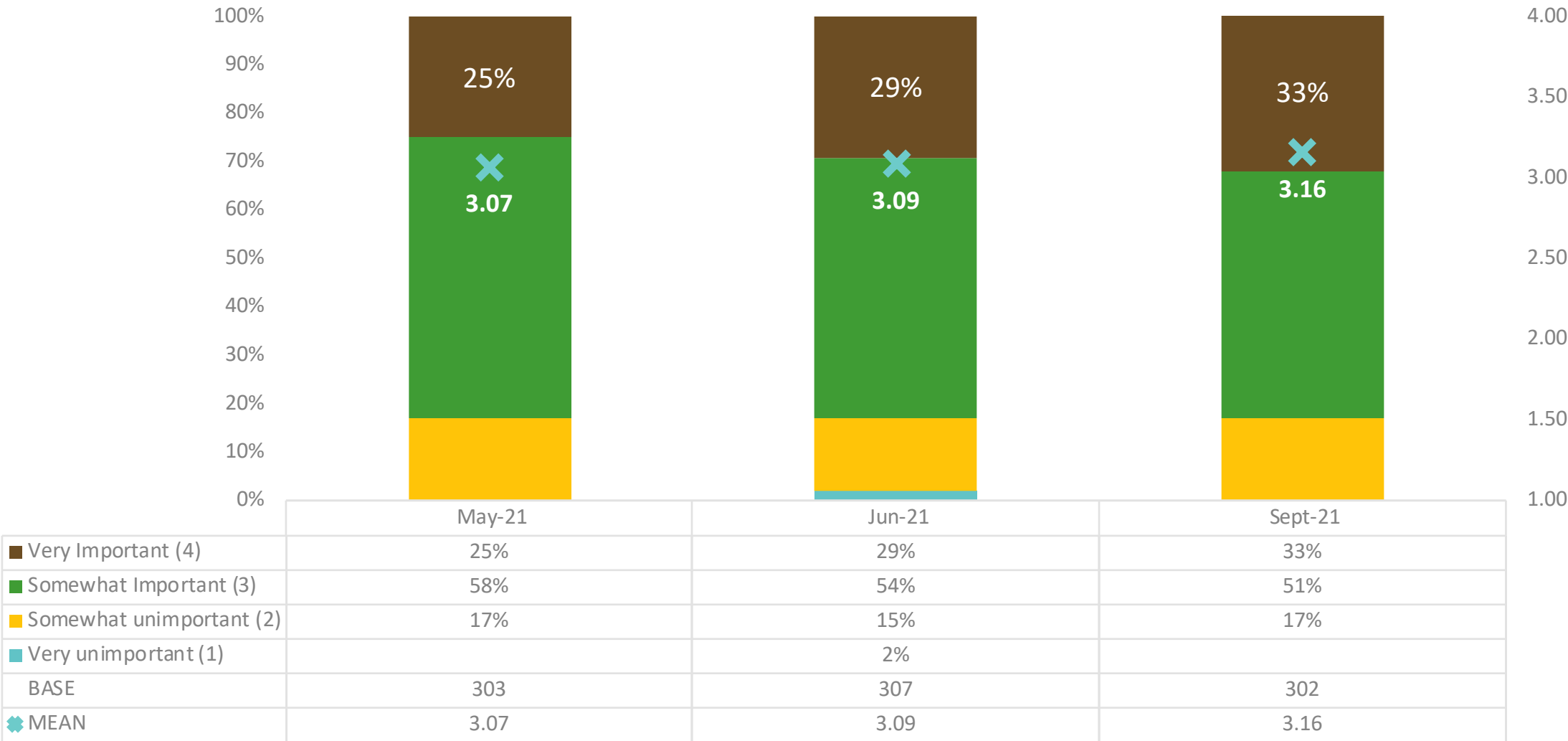
I want to take part in nature-based activities



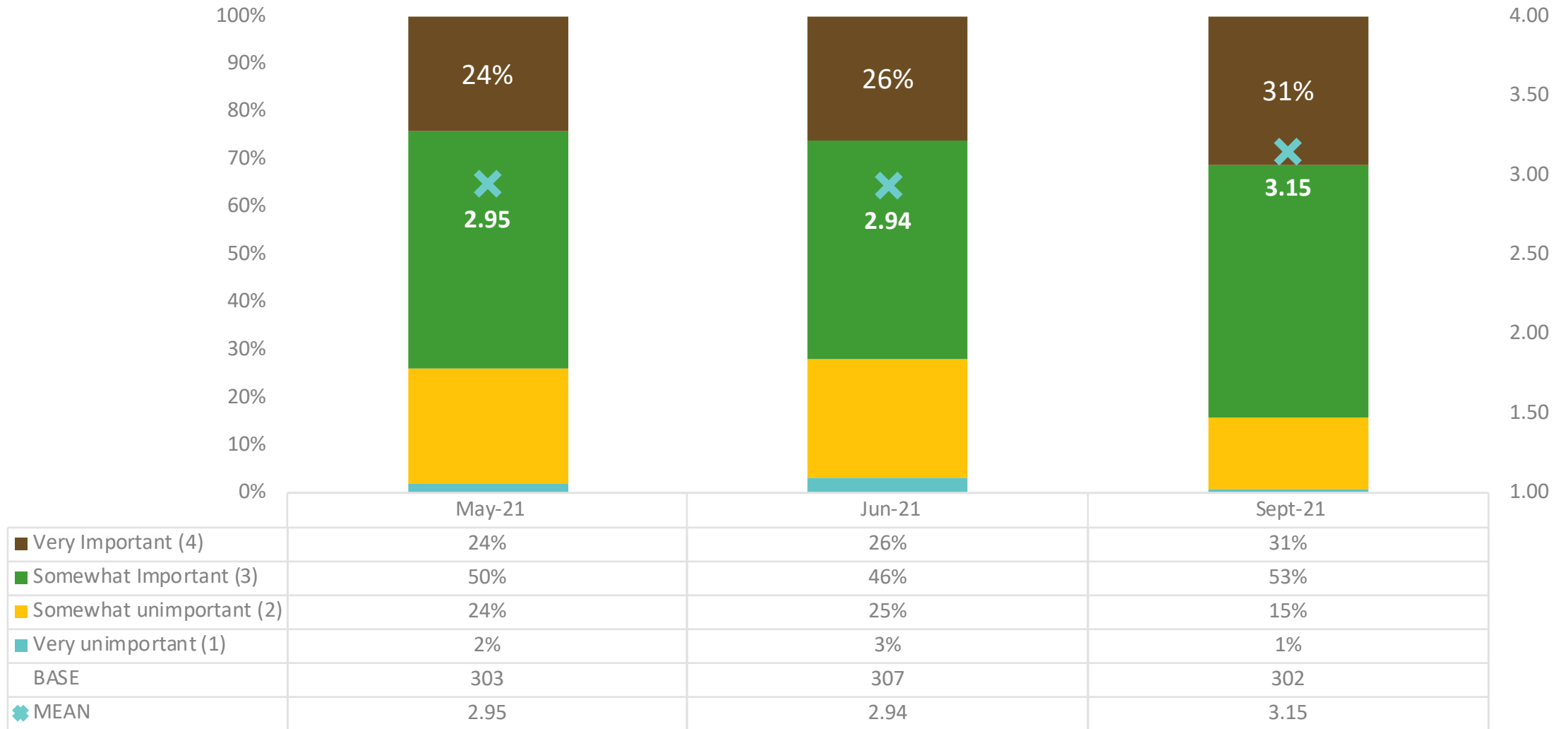
I like visiting destinations that most people value and appreciate



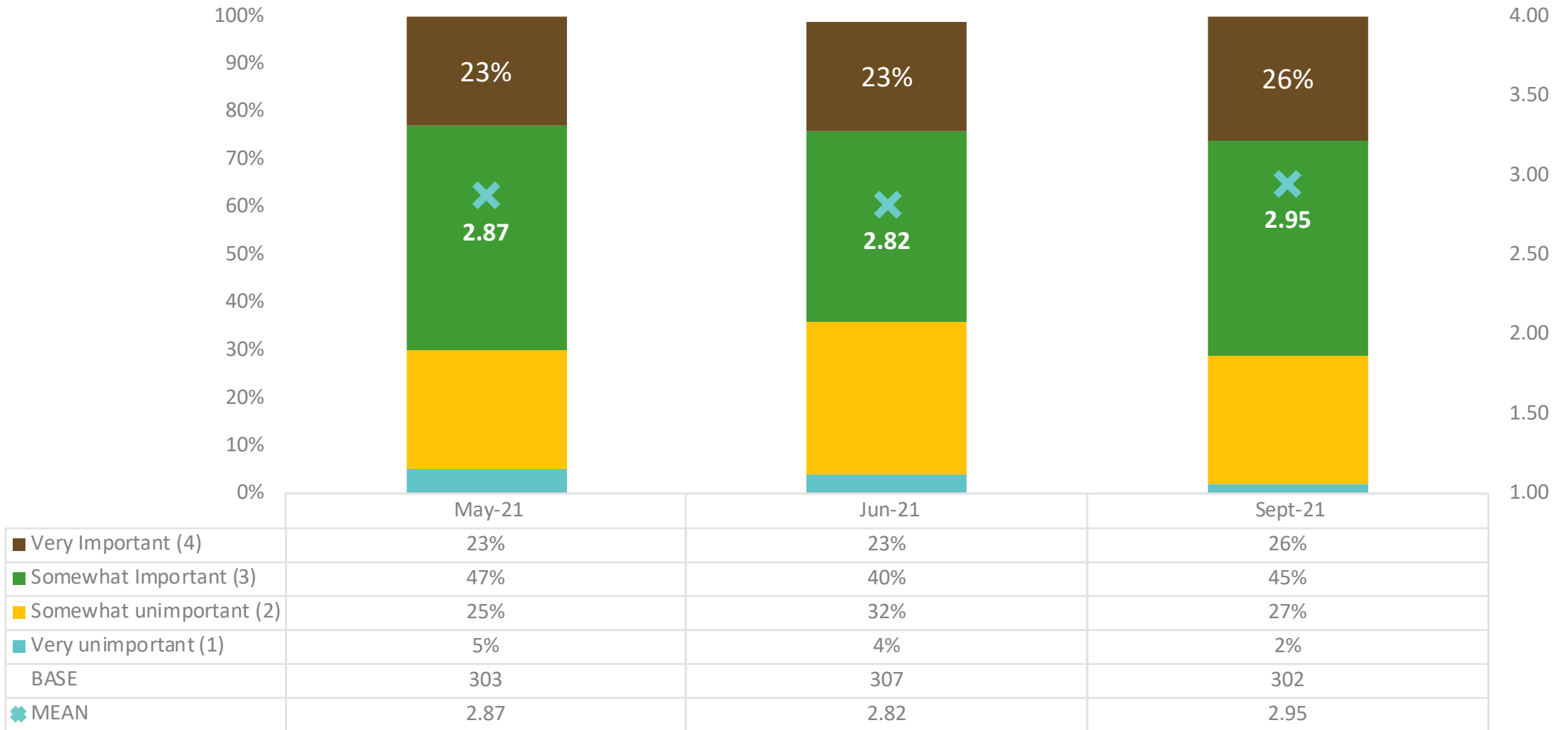
I would like to do something that I could not do in my daily life



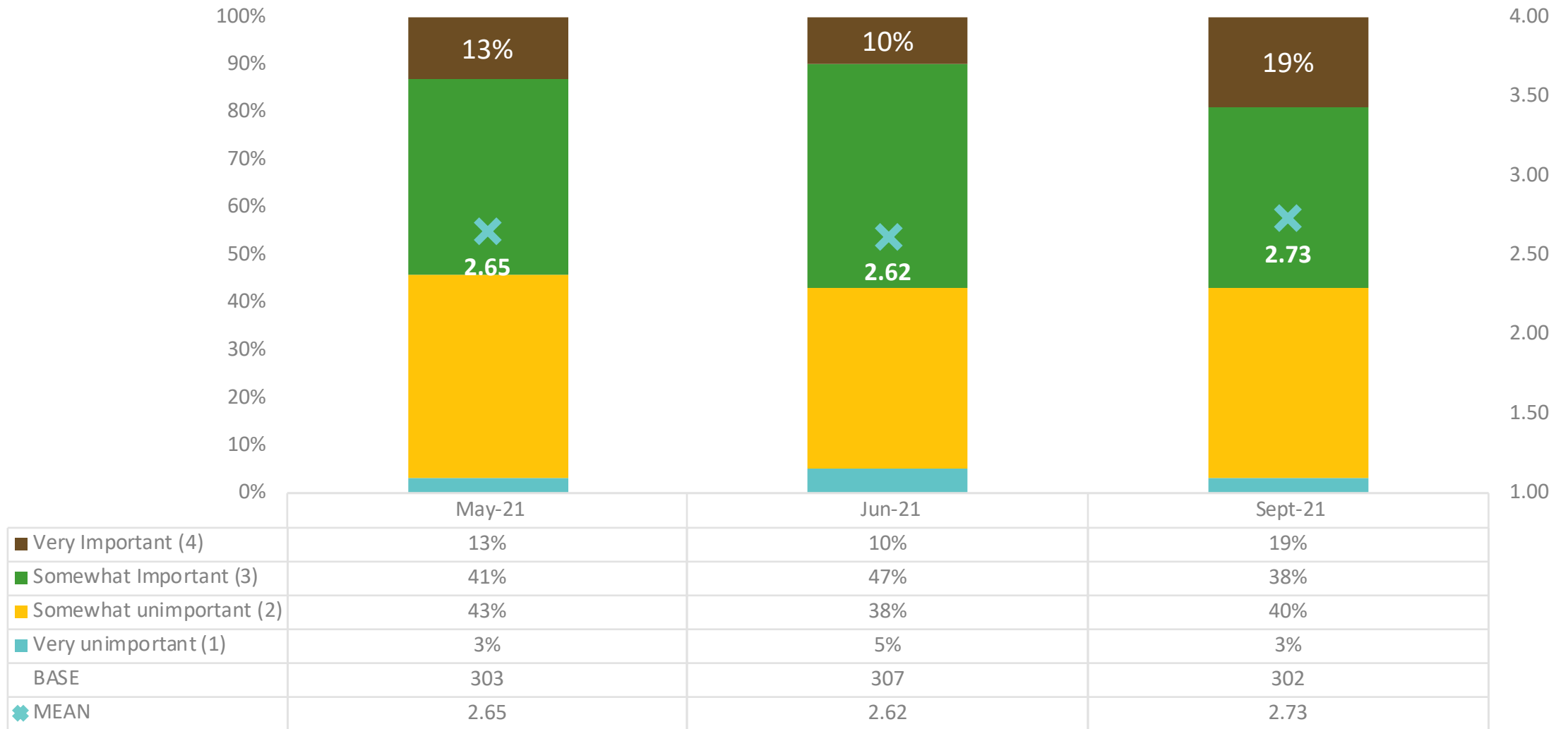
I want to escape my everyday life



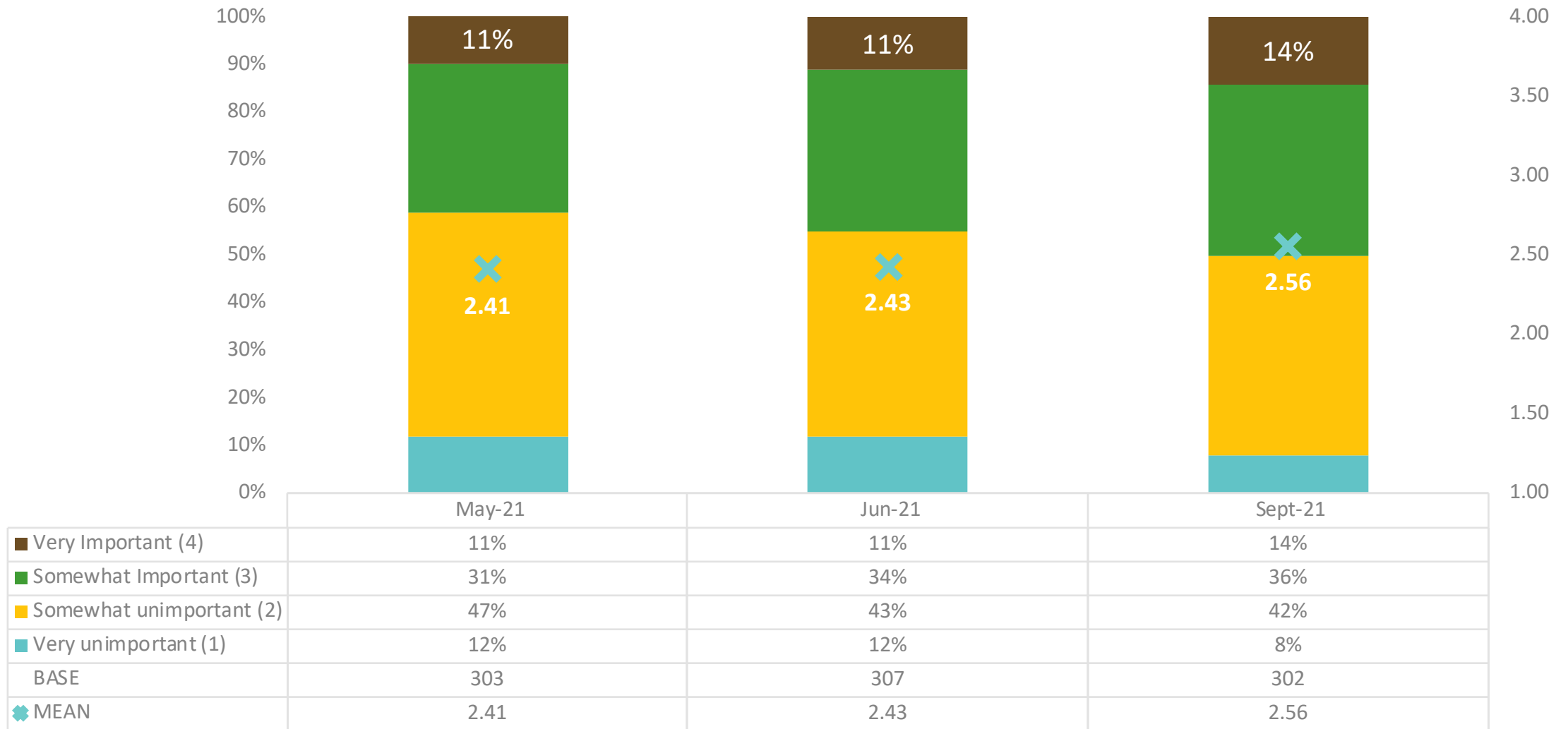
I am interested in shopping



I would like to meet new and interesting people

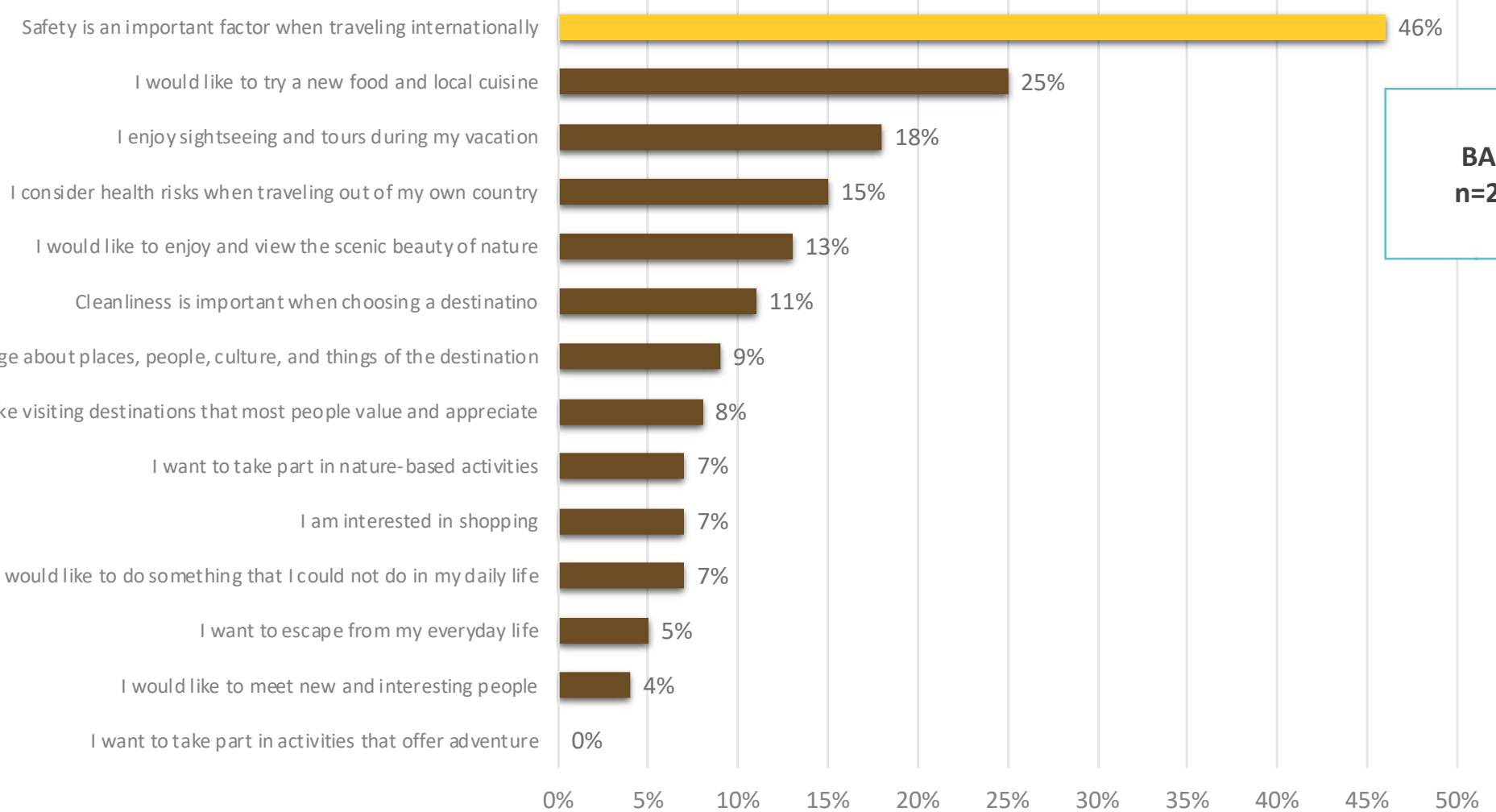


I want to take part in activities that offer adventure



DESTINATION SELECTION FACTORS – TOP TWO

Safety was the top selection factor chosen.



BASE
n=263

DESTINATION SELECTION FACTORS – TOP TWO

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





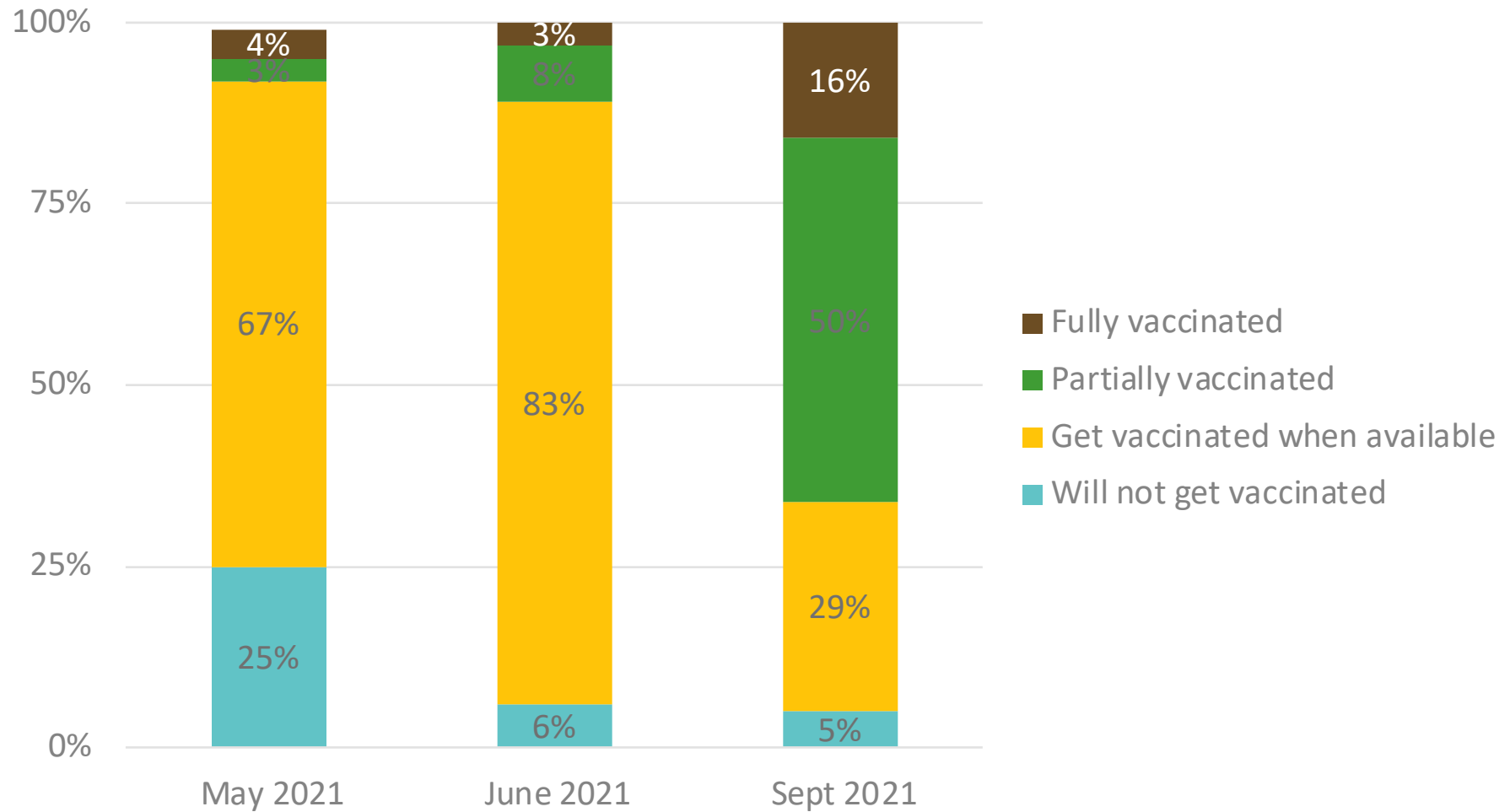
SECTION 2

COVID-19



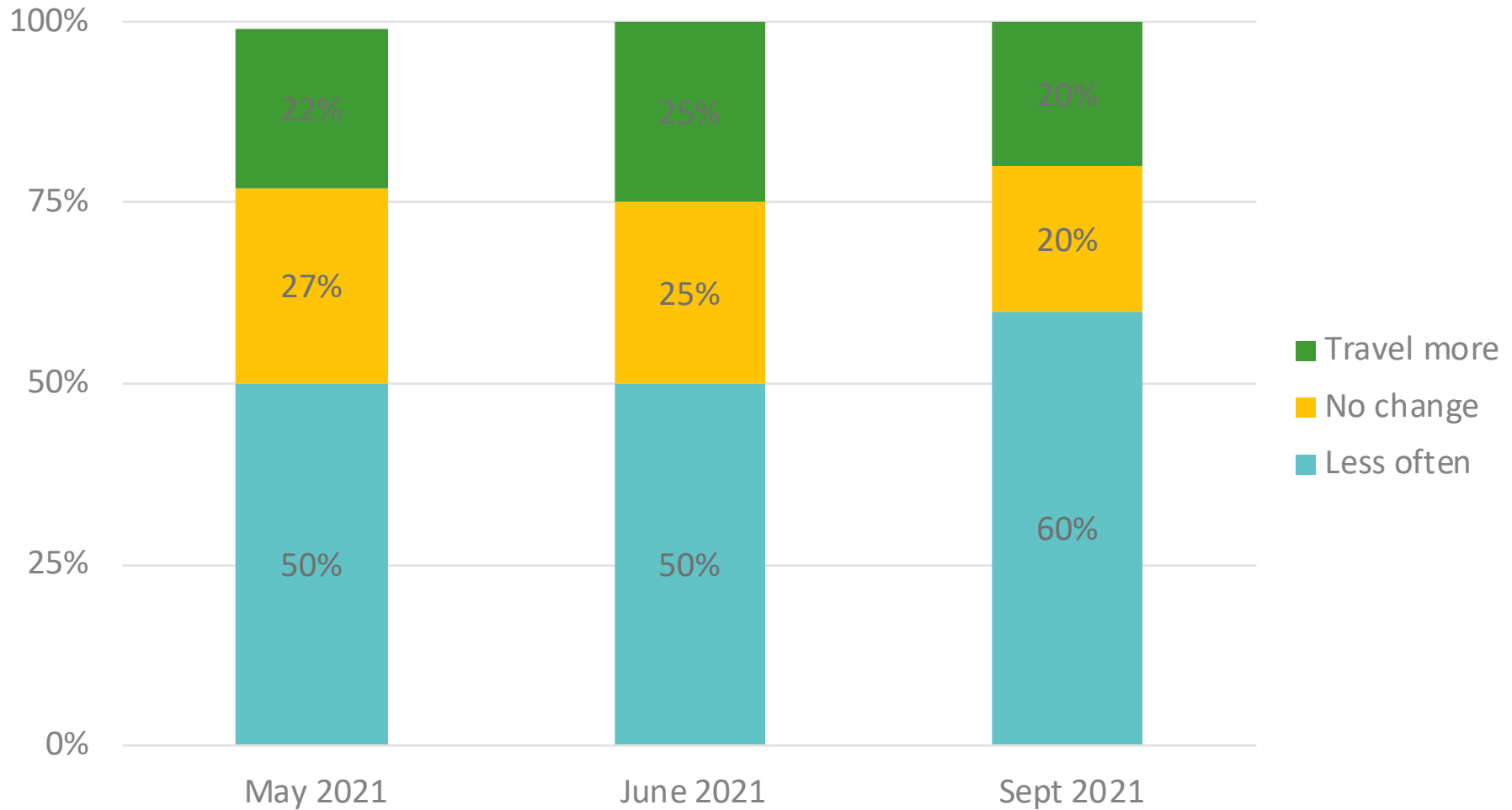
COVID-19 VACCINE STATUS

The proportion of respondents who are fully vaccinated is very small although half are partially vaccinated.



POST-COVID TRAVEL

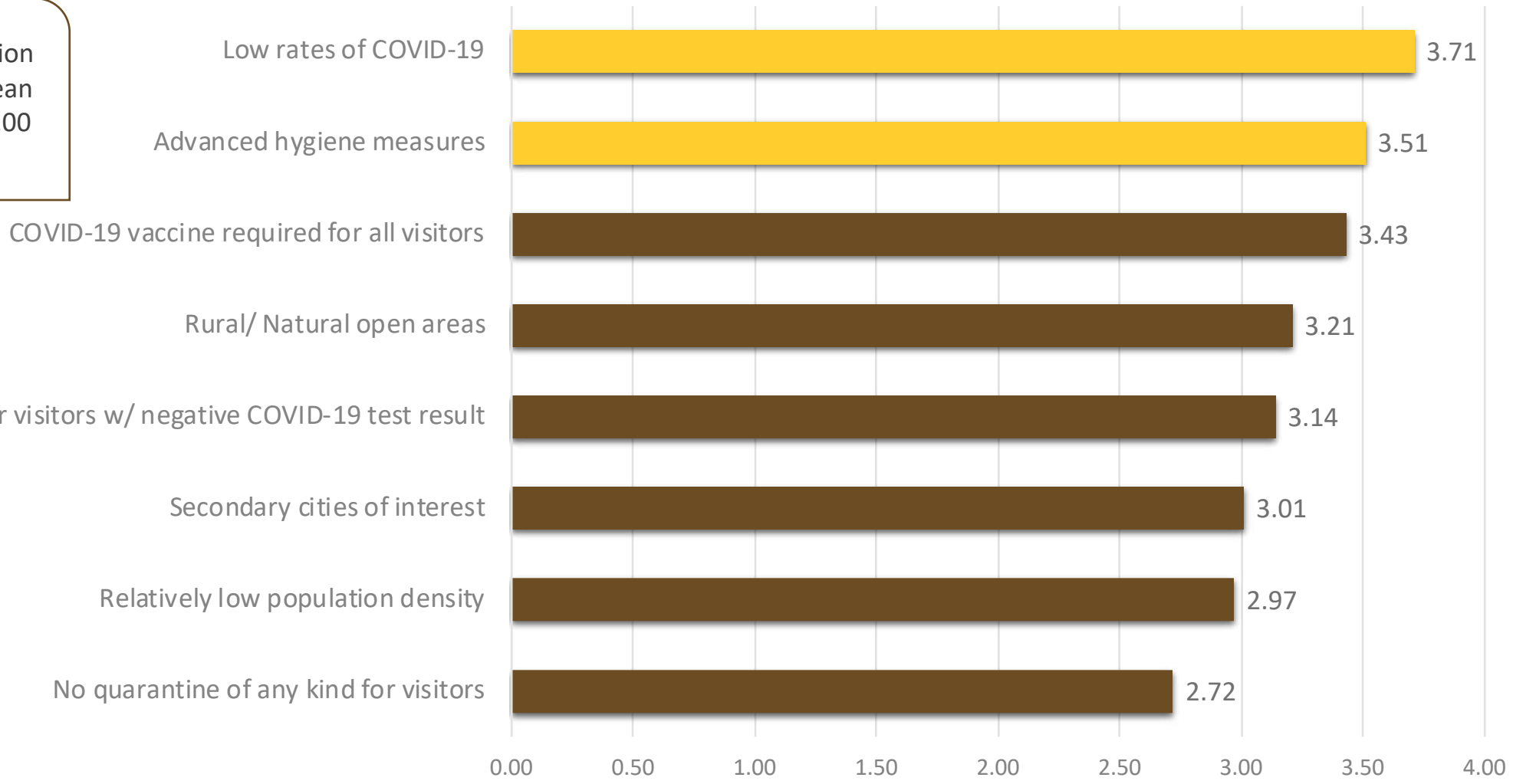
Recovery of the Taiwanese market will take time.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

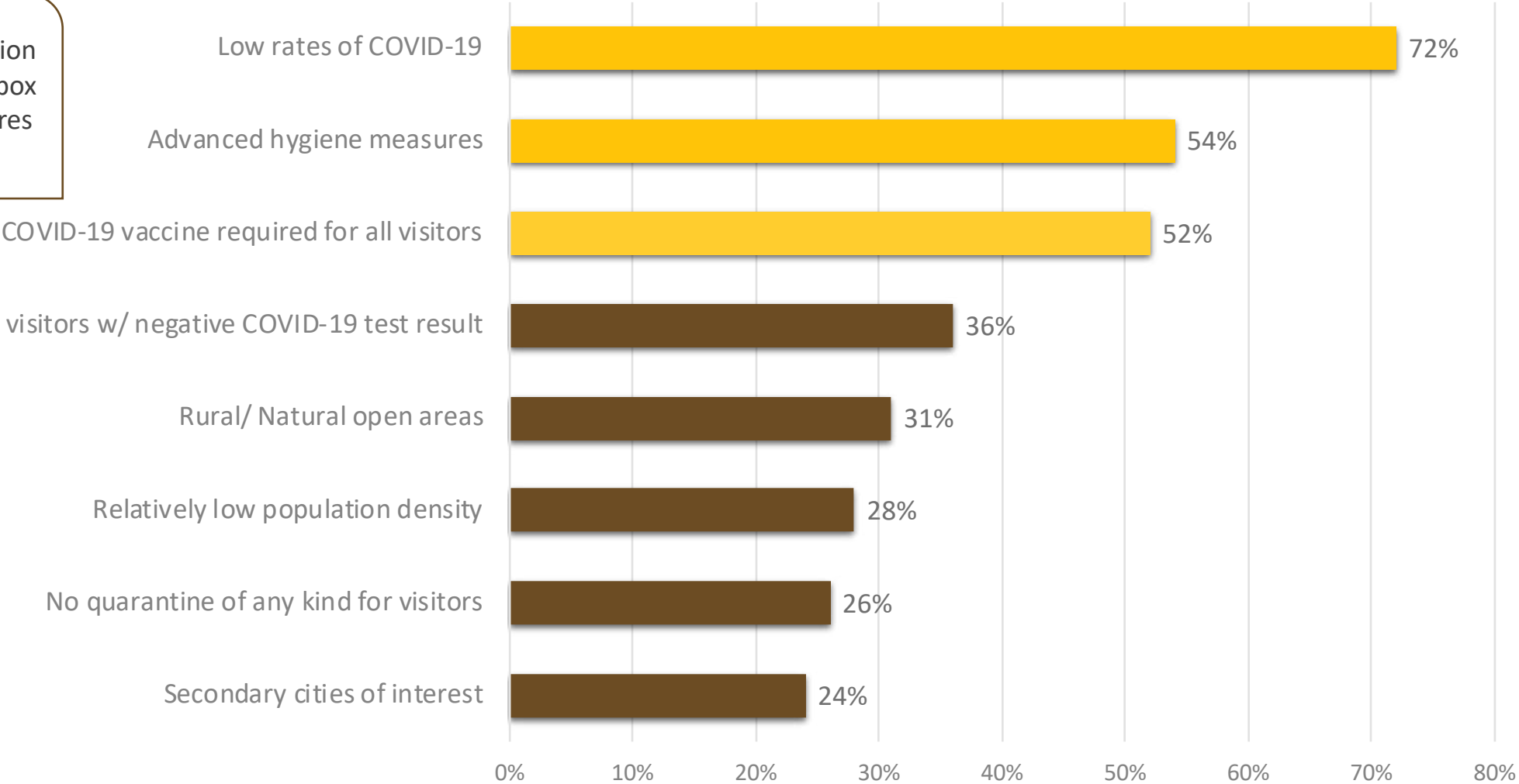
Two (yellow) selection factors received mean scores above the 3.00 threshold.



POST-COVID TRAVEL – IMPORTANCE

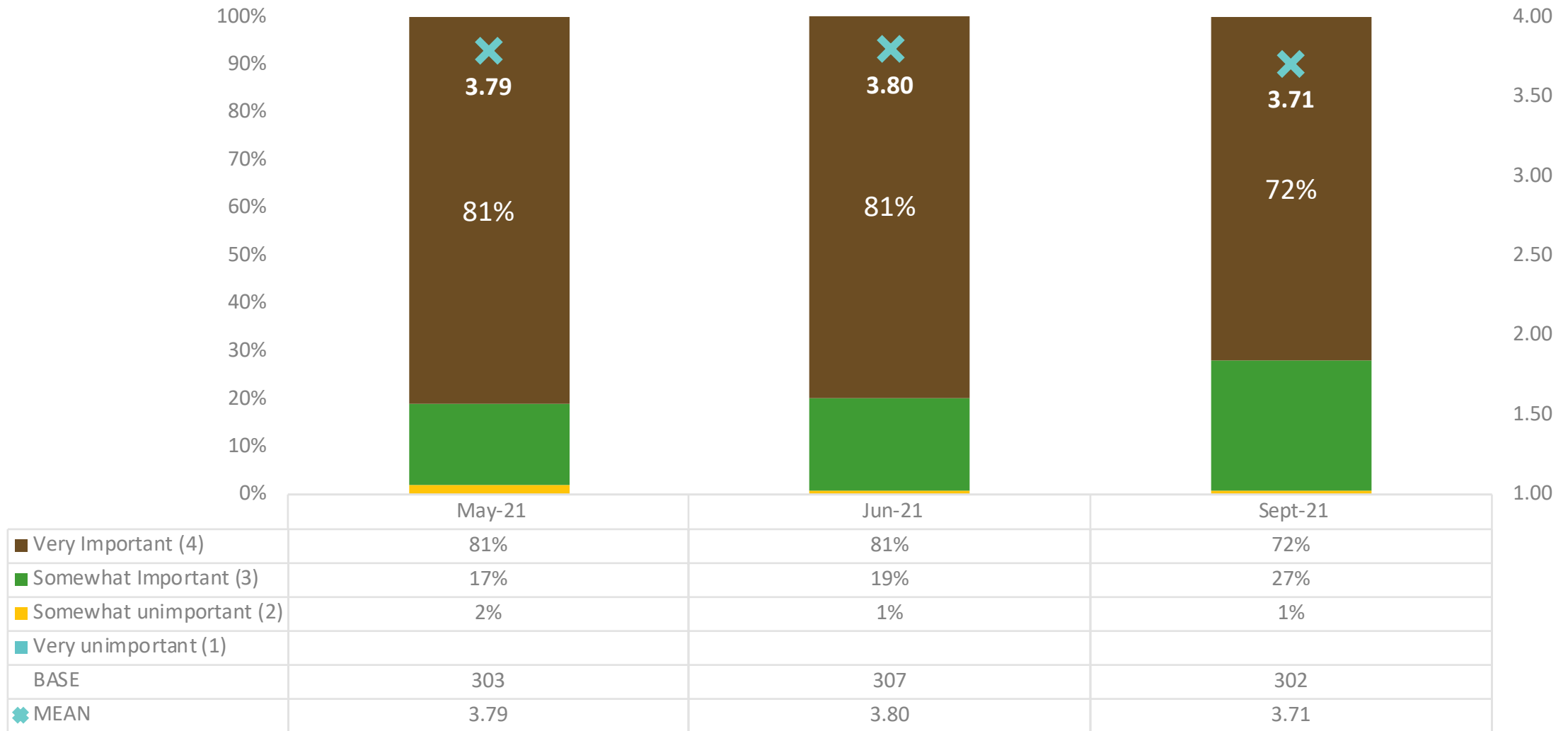
4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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



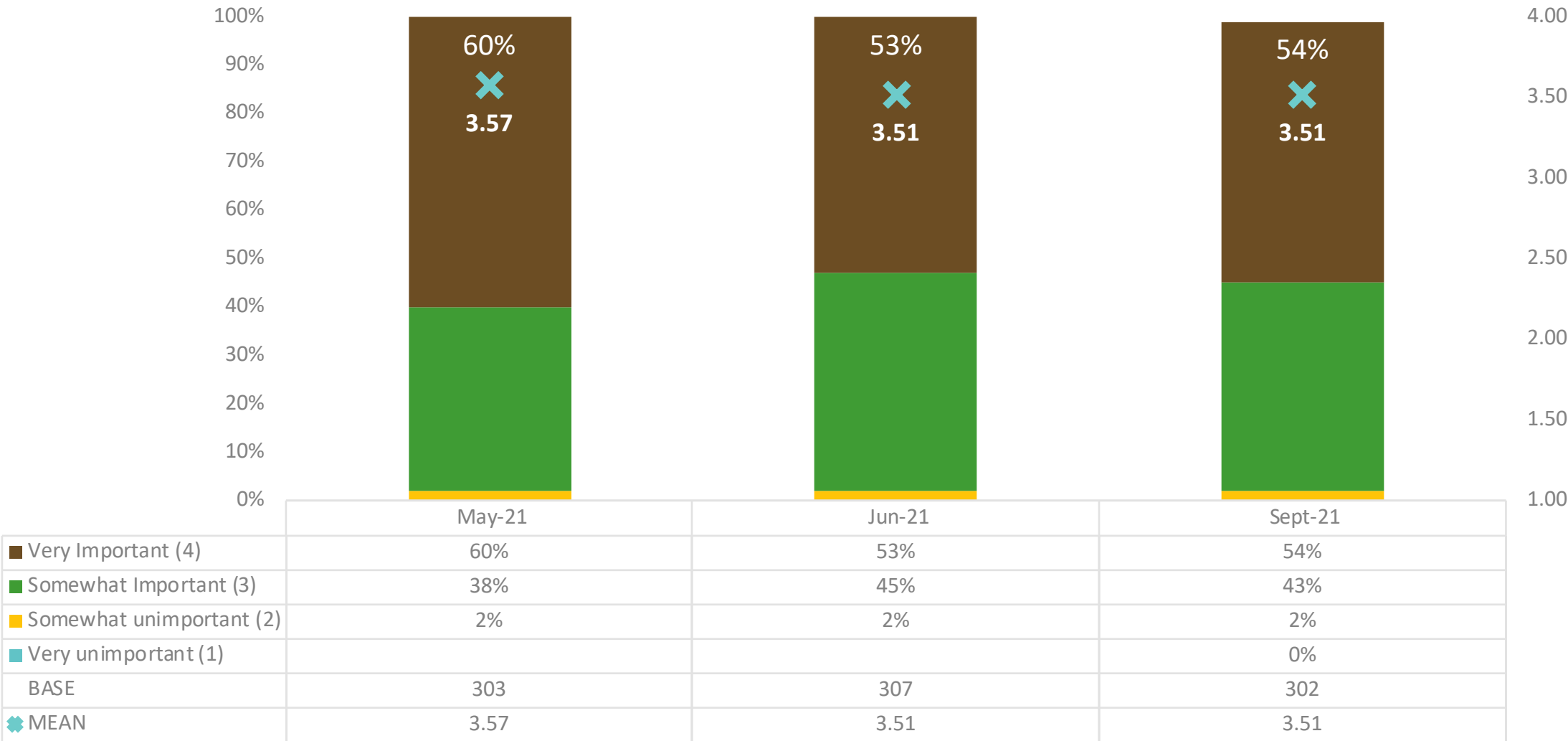
POST-COVID SELECTION FACTOR

Low rates of COVID-19



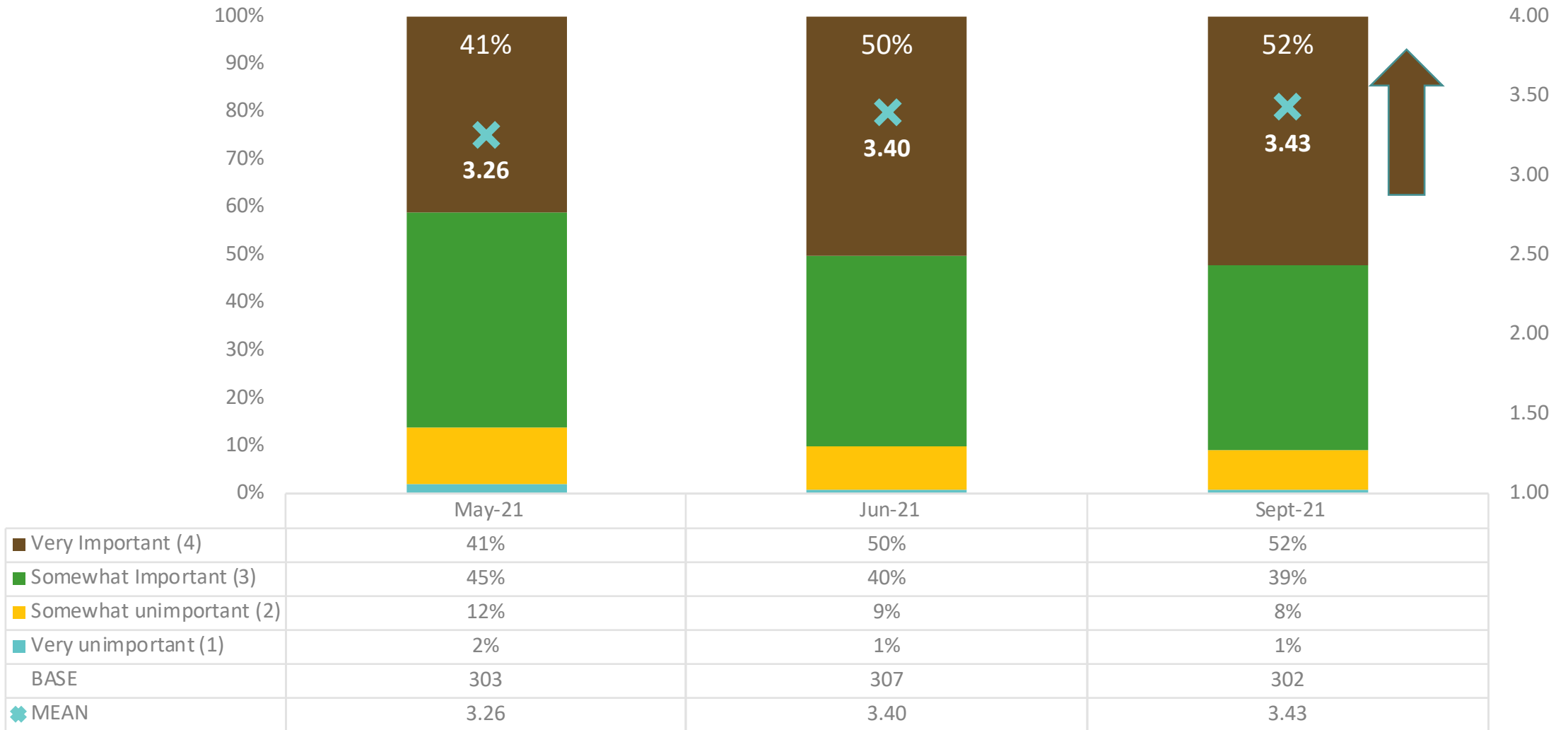
POST-COVID SELECTION FACTOR

Advanced hygiene measures



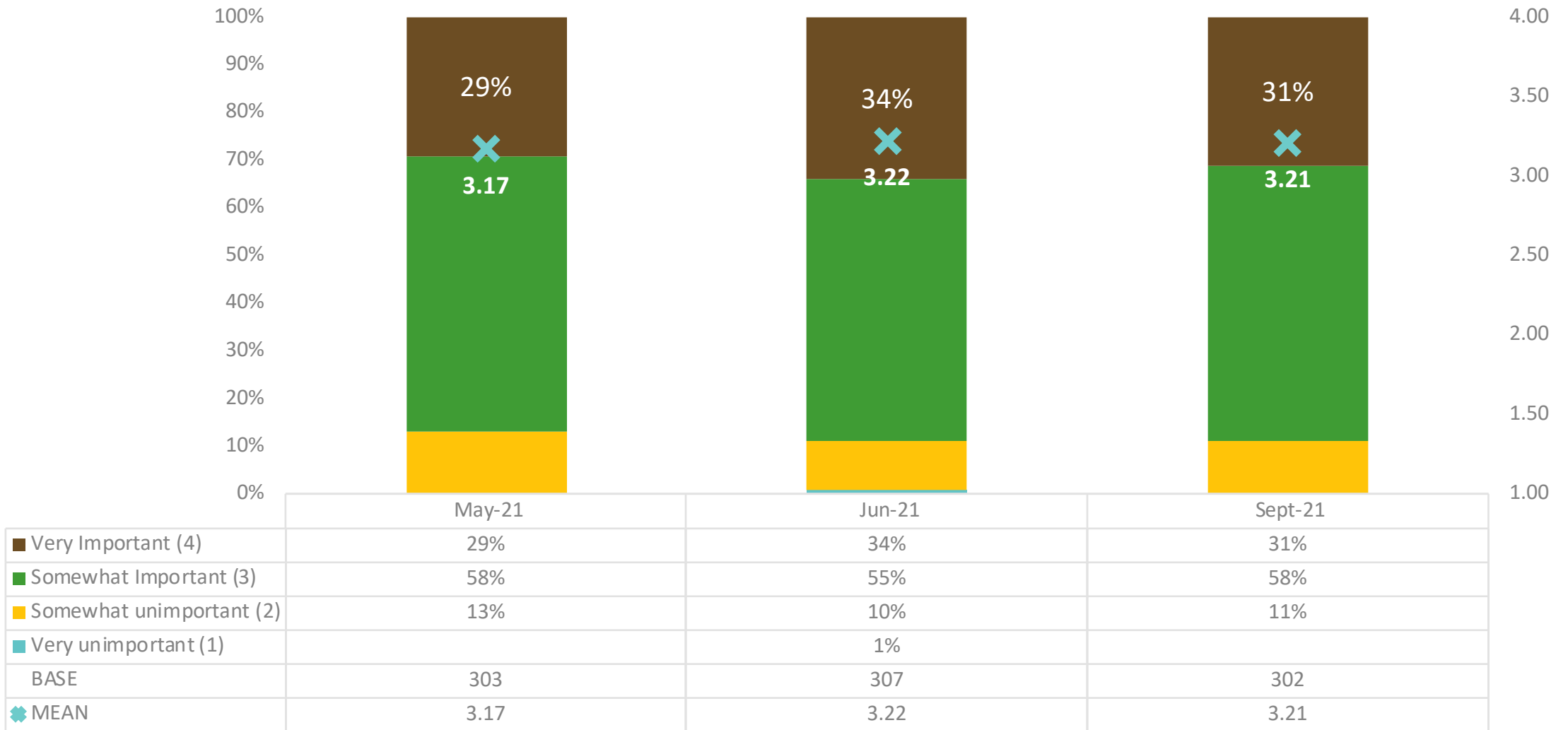
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



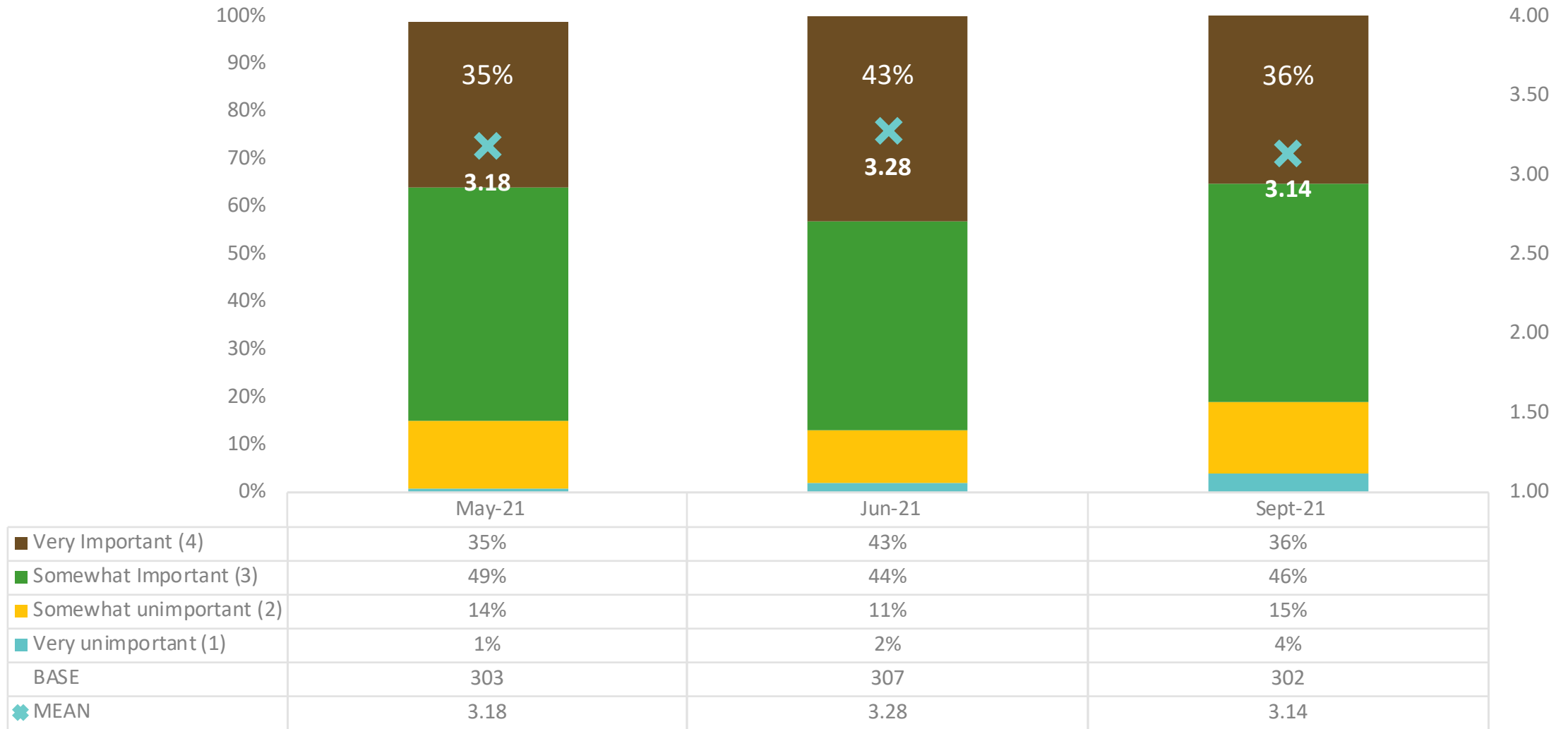
POST-COVID SELECTION FACTOR

Rural/ natural open areas



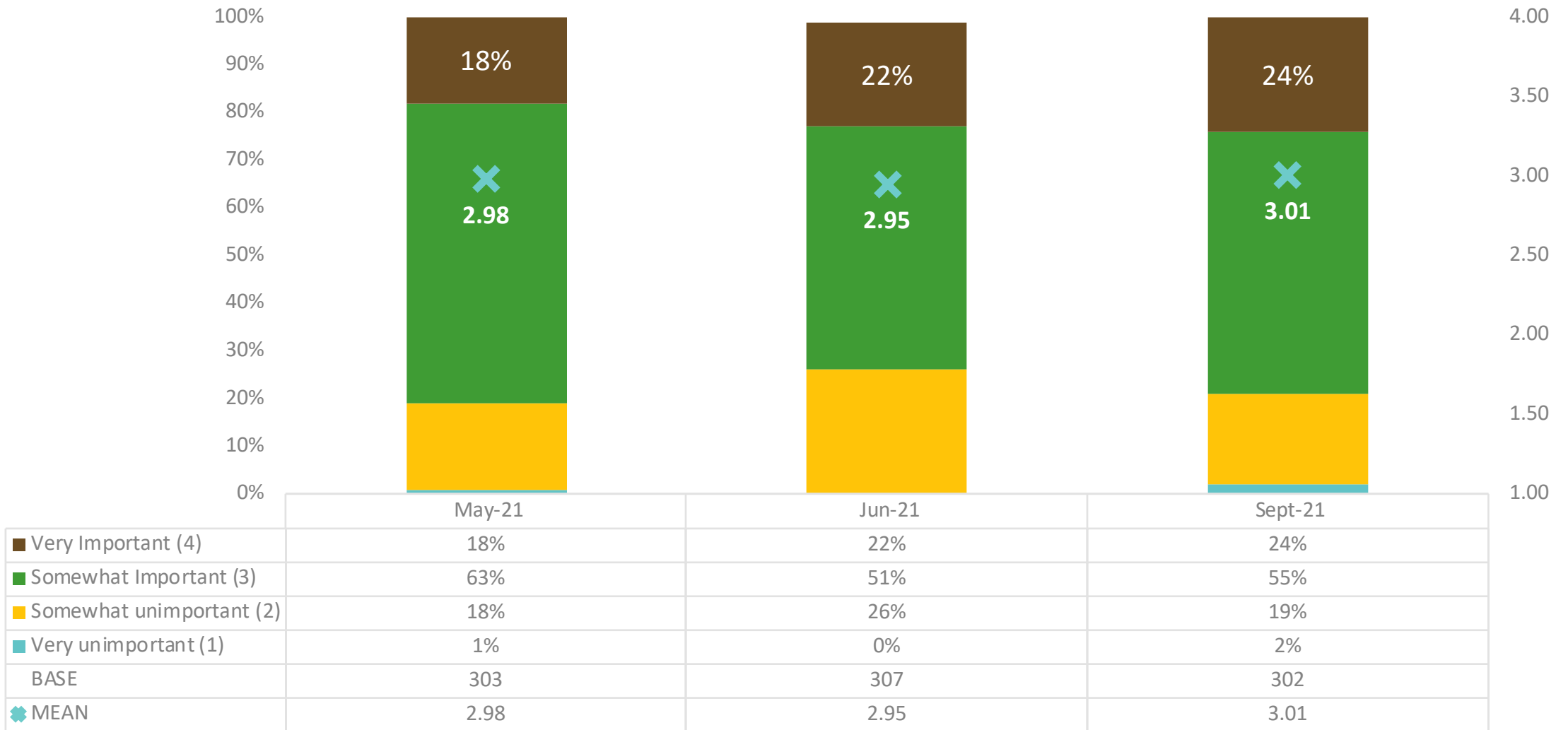
POST-COVID SELECTION FACTOR

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



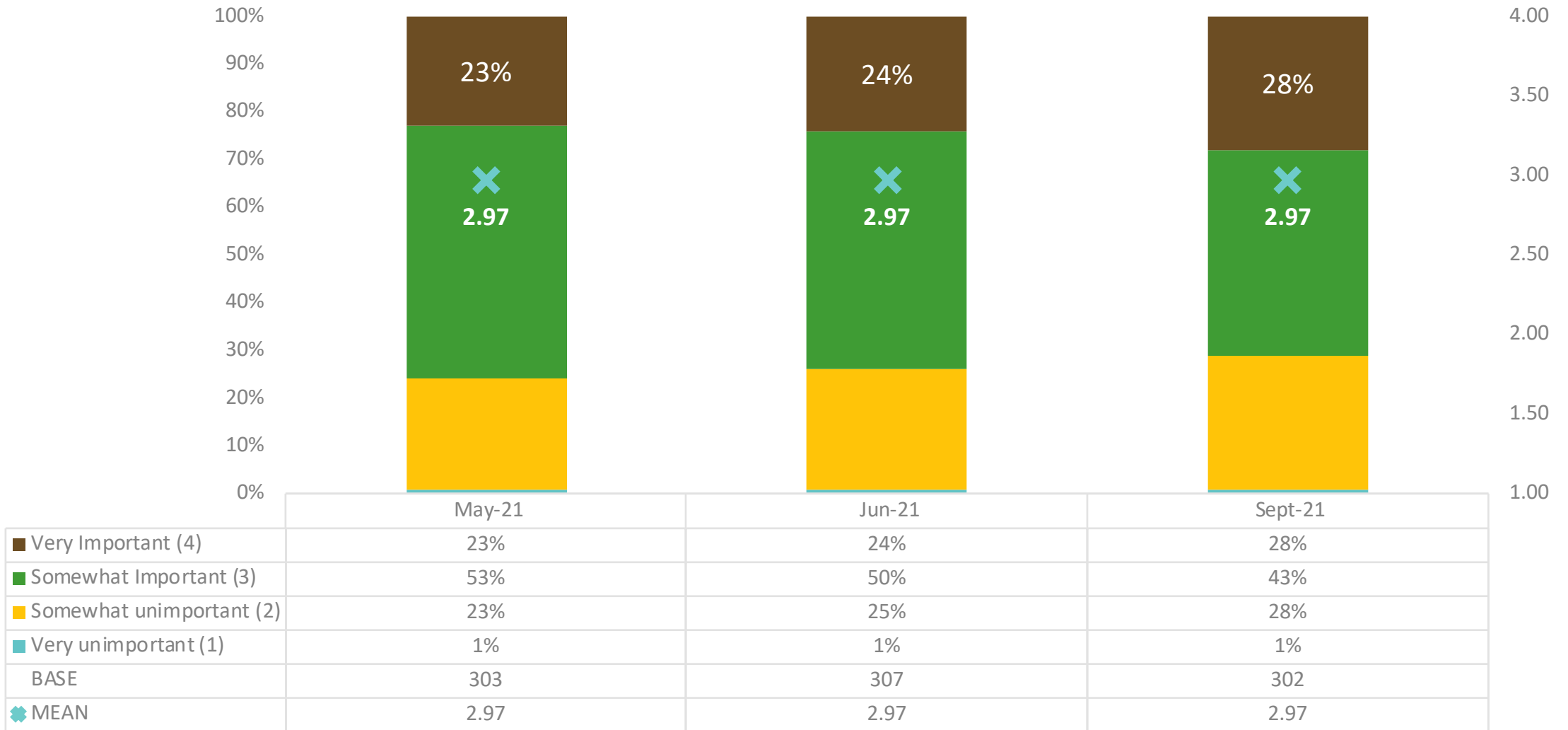
POST-COVID SELECTION FACTOR

Secondary cities of interest



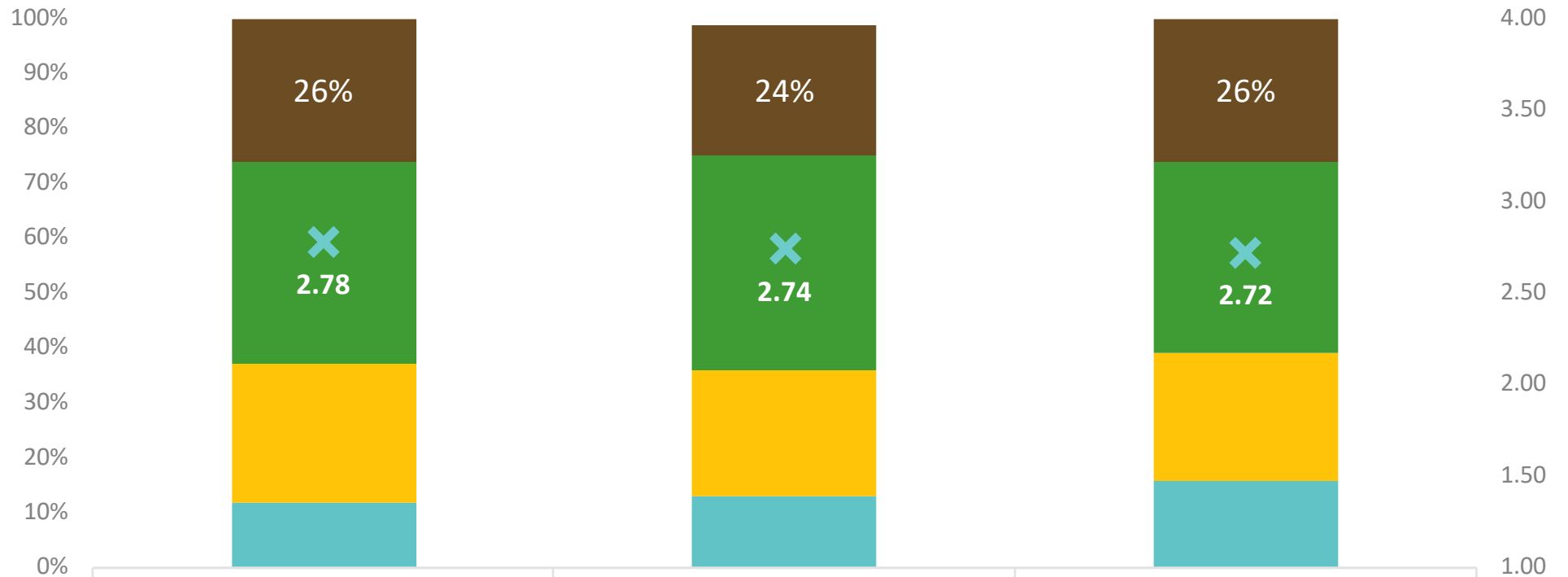
POST-COVID SELECTION FACTOR

Relatively low population density



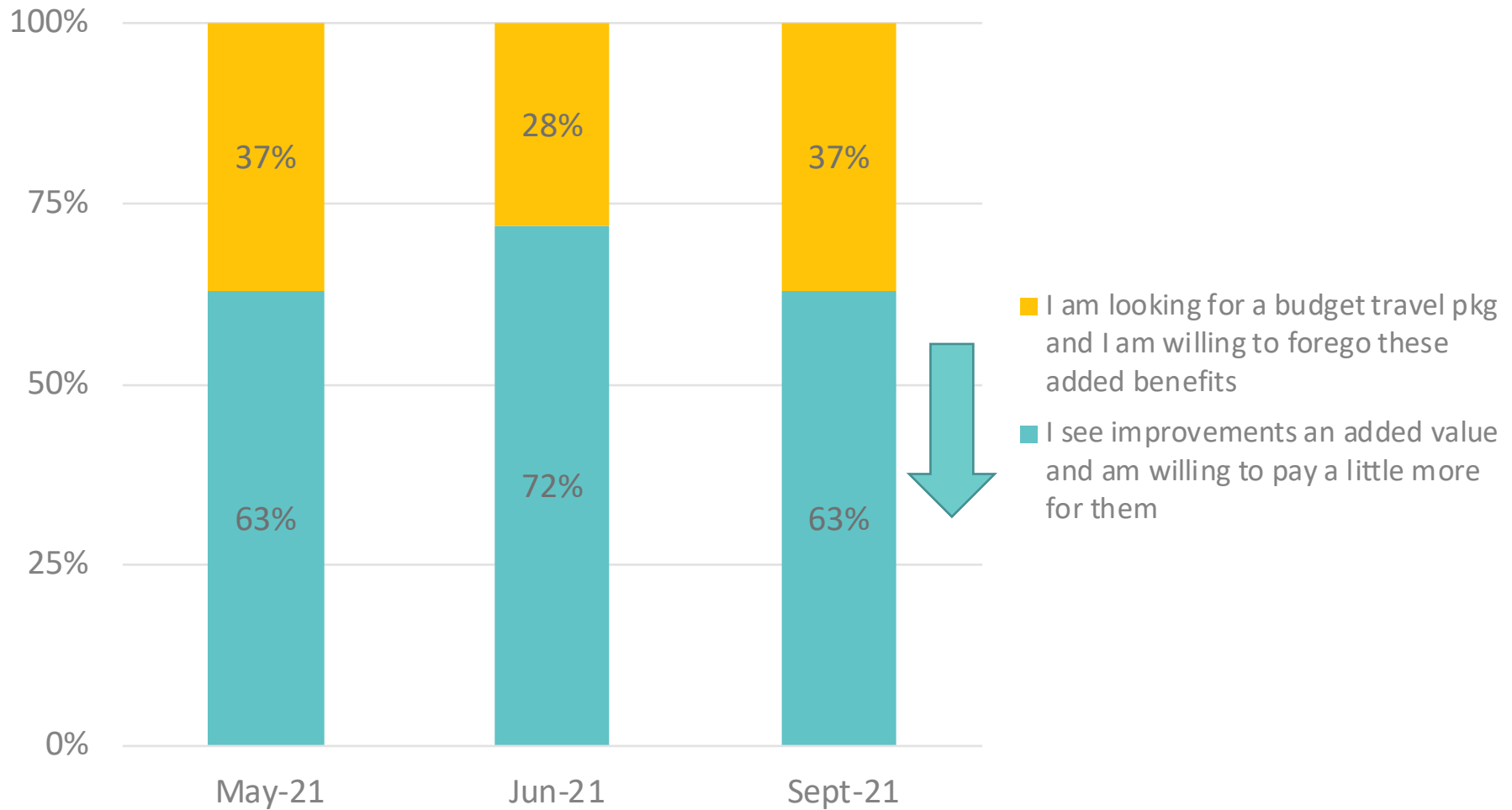
POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



	May-21	Jun-21	Sept-21
Very Important (4)	26%	24%	26%
Somewhat Important (3)	37%	39%	35%
Somewhat unimportant (2)	25%	23%	23%
Very unimportant (1)	12%	13%	16%
BASE	303	307	302
MEAN	2.78	2.74	2.72

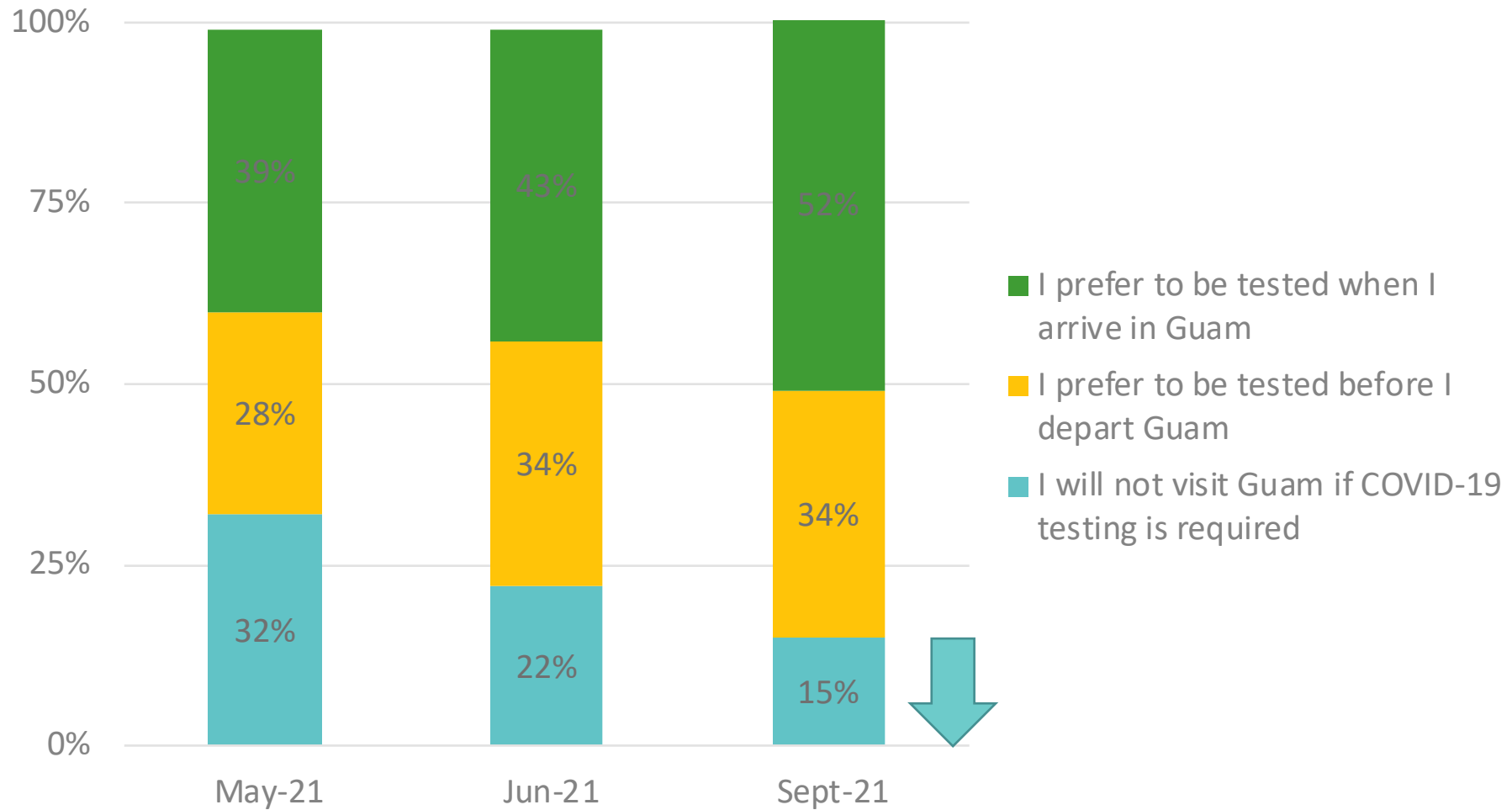
GUAM AIRPORT COVID-19 SAFETY MEASURES



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



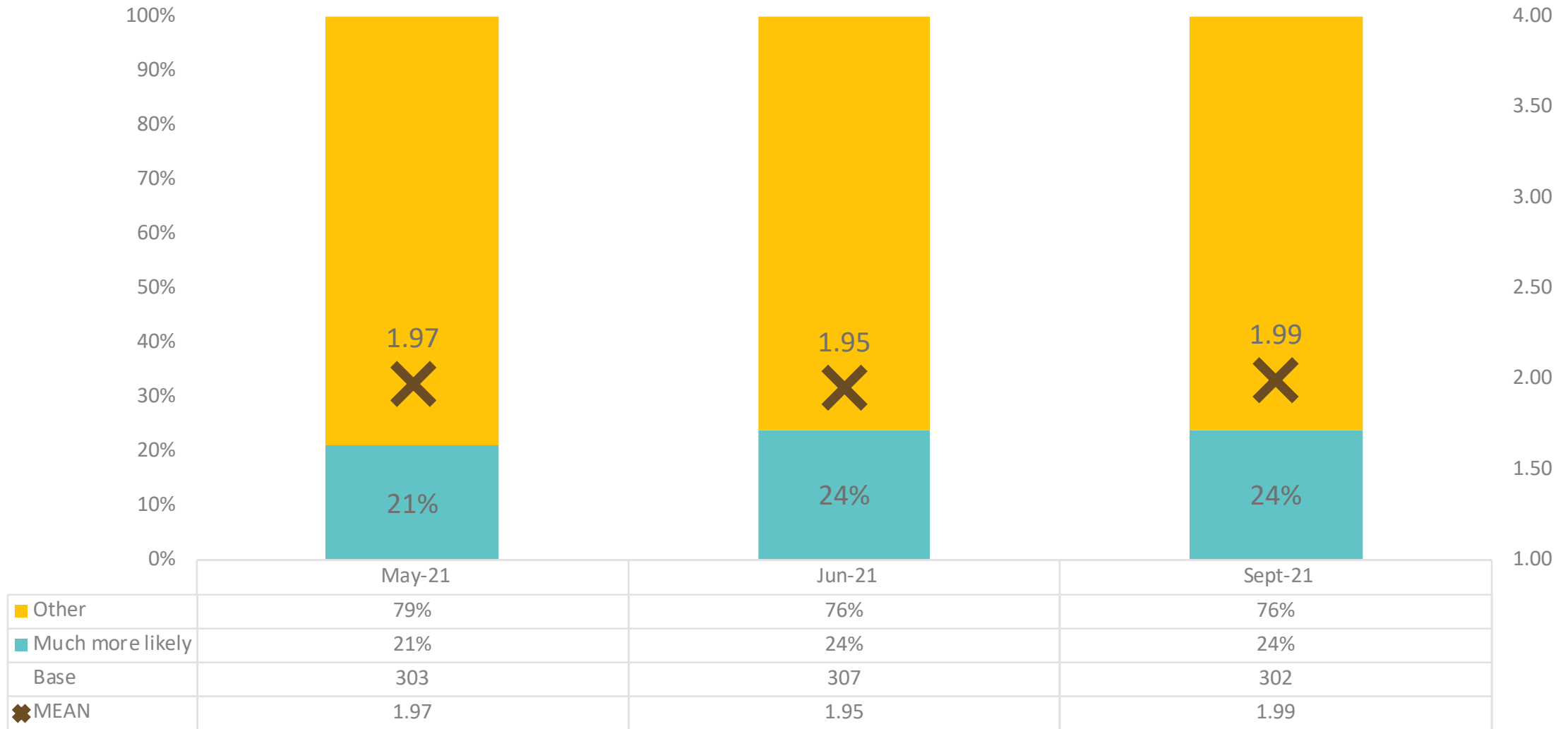
ON-ISLE COVID-19 TESTING PREFERENCE



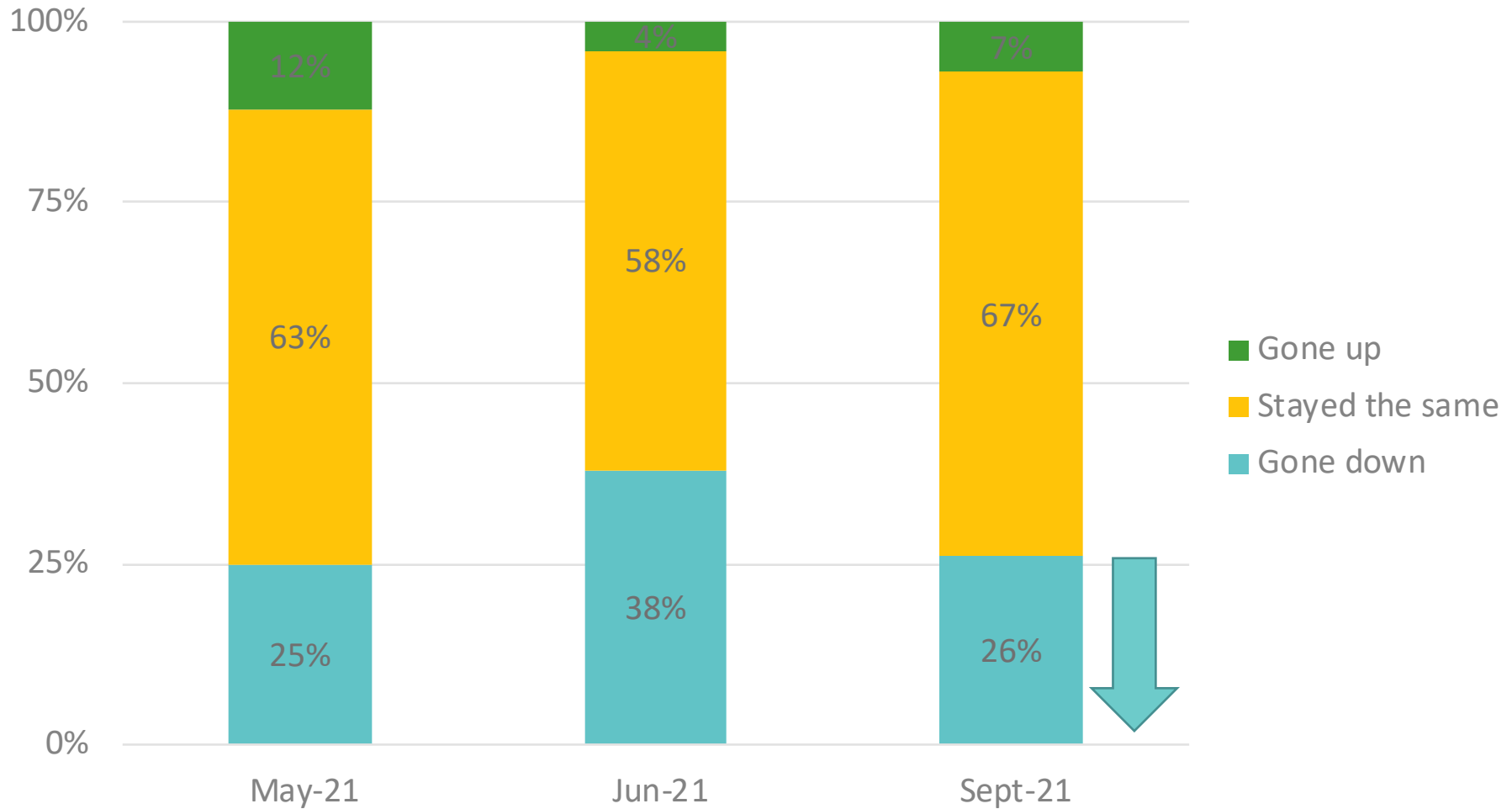
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



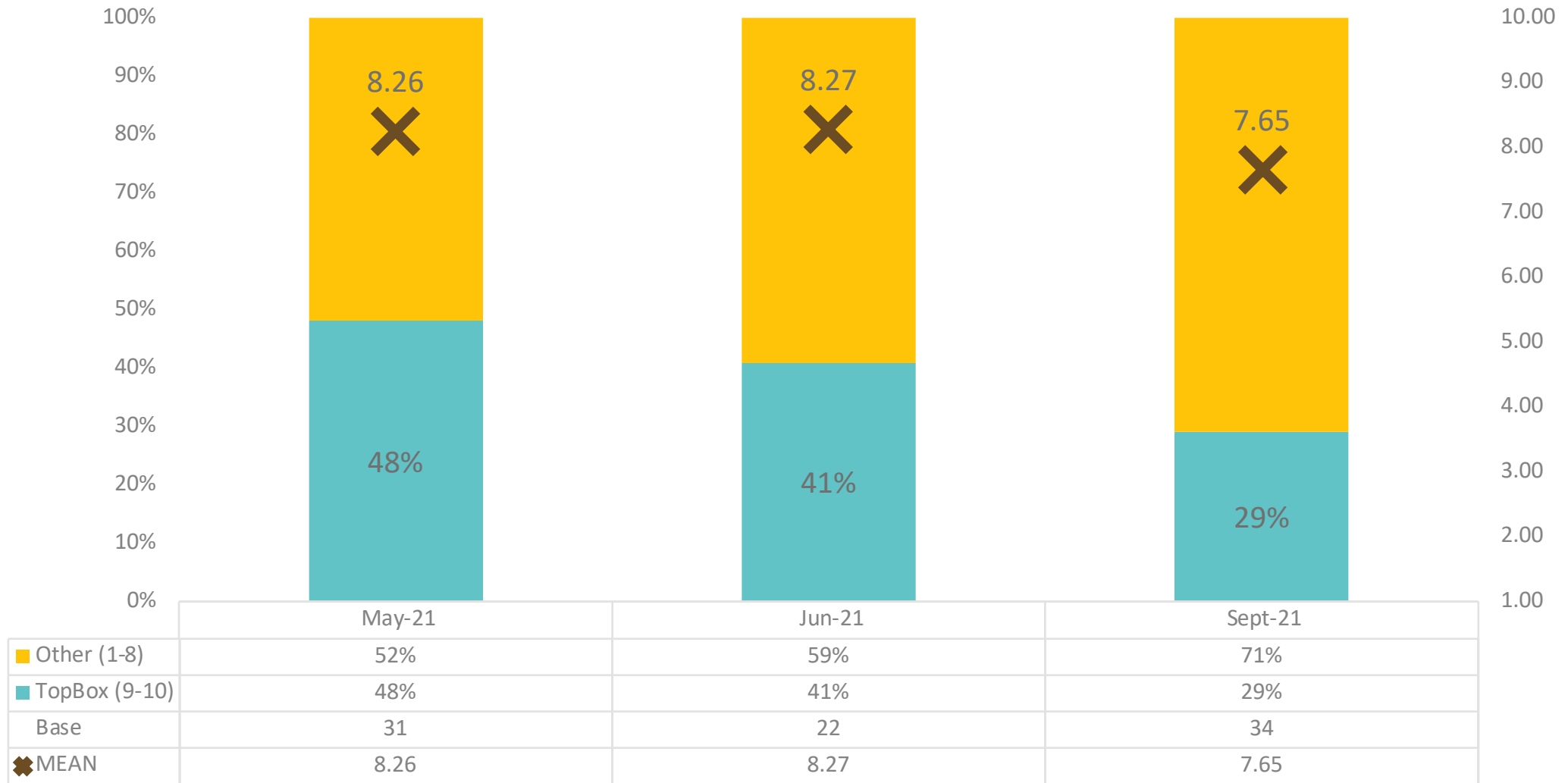


SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



Caution
small
base

[A]



PRIMARY TRAVEL MOTIVATION

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

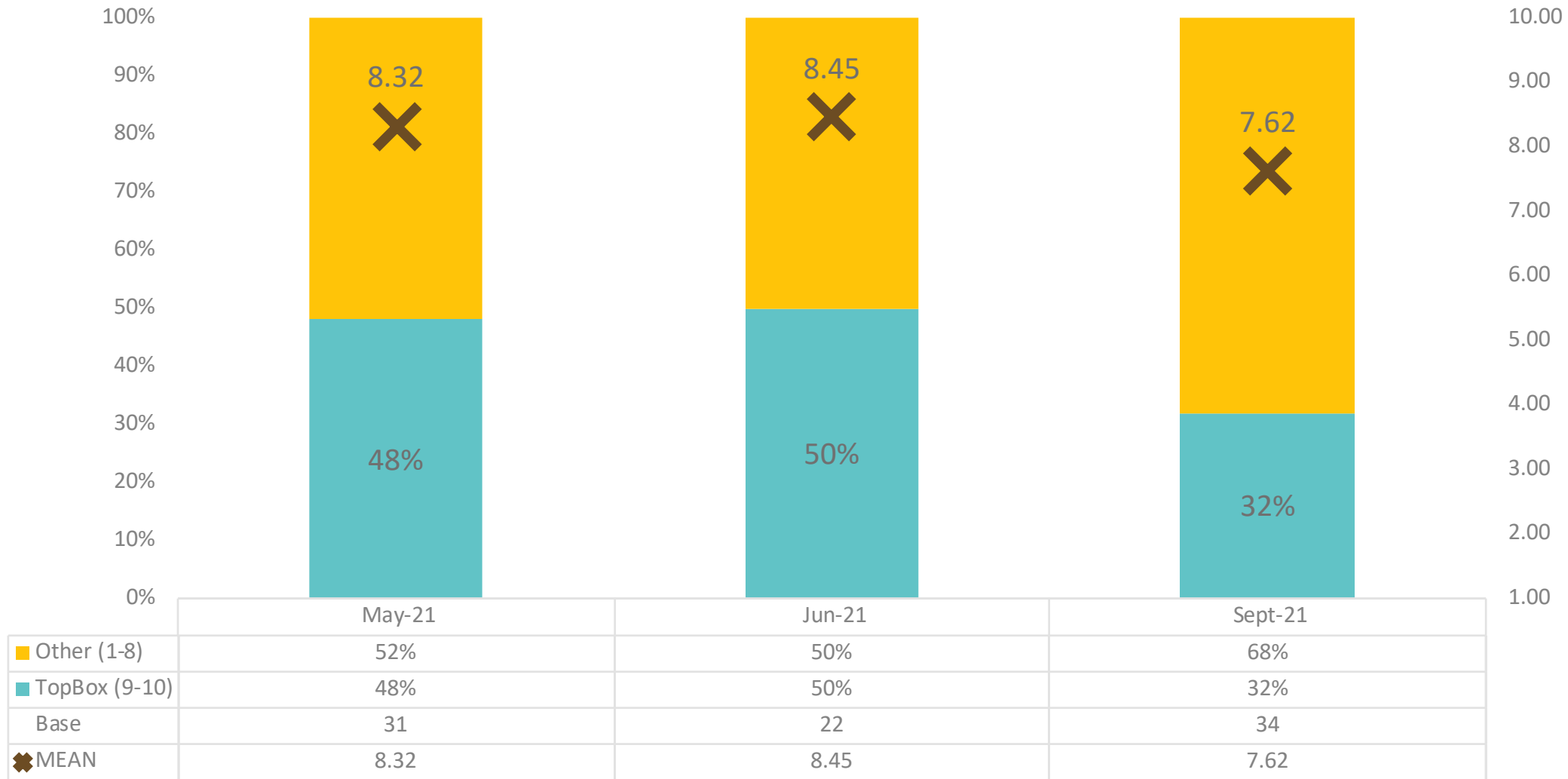
Caution
small
base

TRAVEL MOTIVATIONS – TOP 3

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



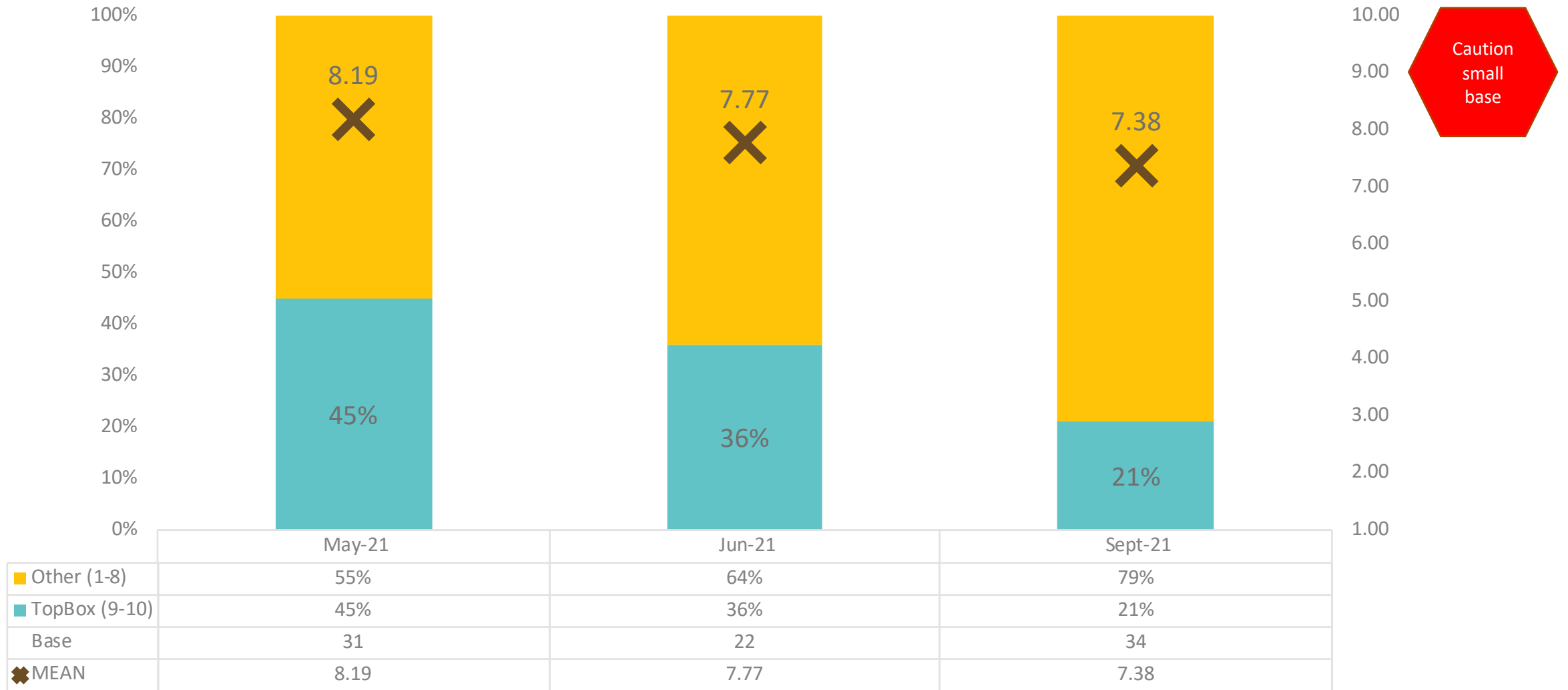
BRAND ADVOCACY – 10PT SCALE



Caution
small
base



BRAND LOYALTY – 10PT SCALE



GUAM TRAVELER – TRIP MOTIVATIONS

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



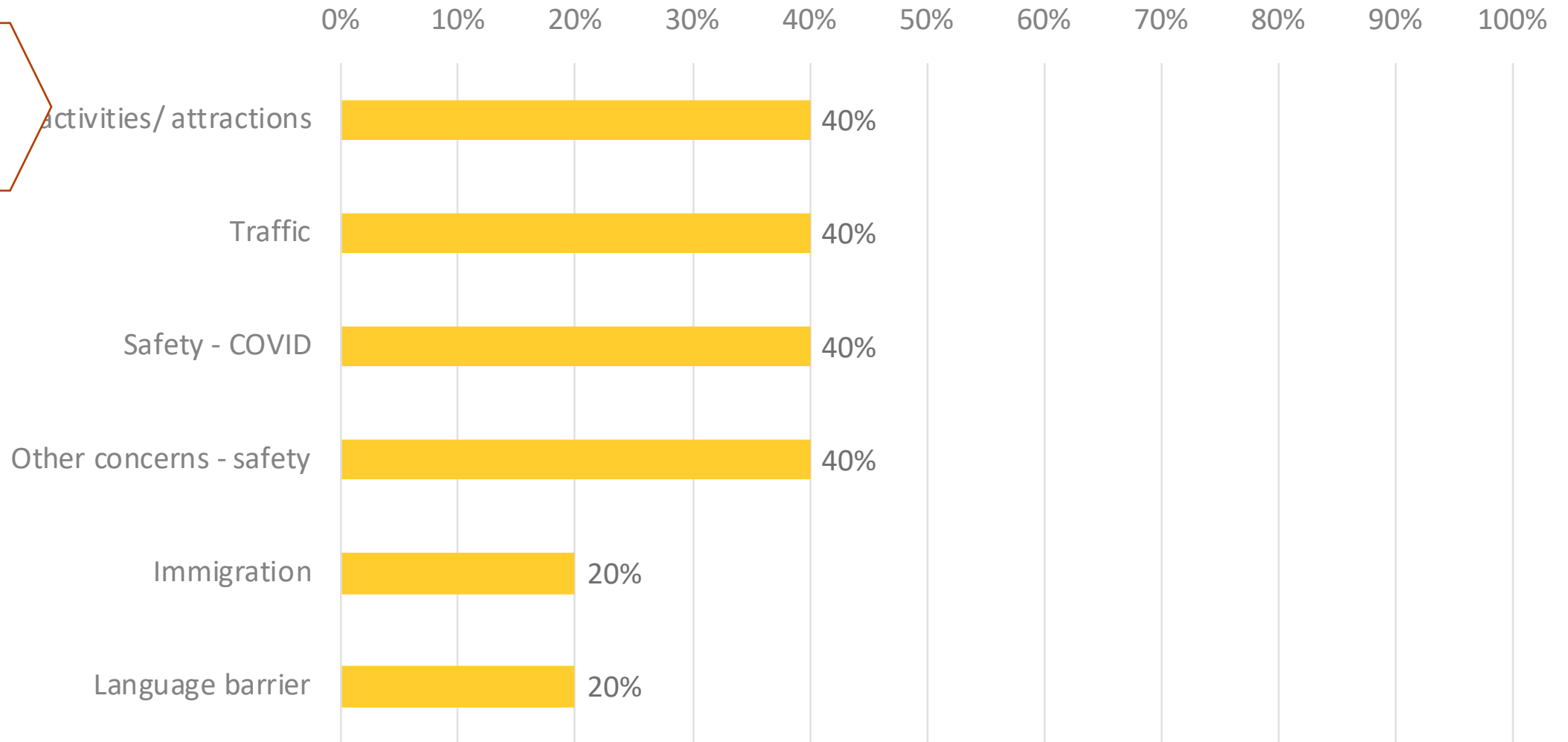
GUAM TRAVELERS – DRAWBACKS

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



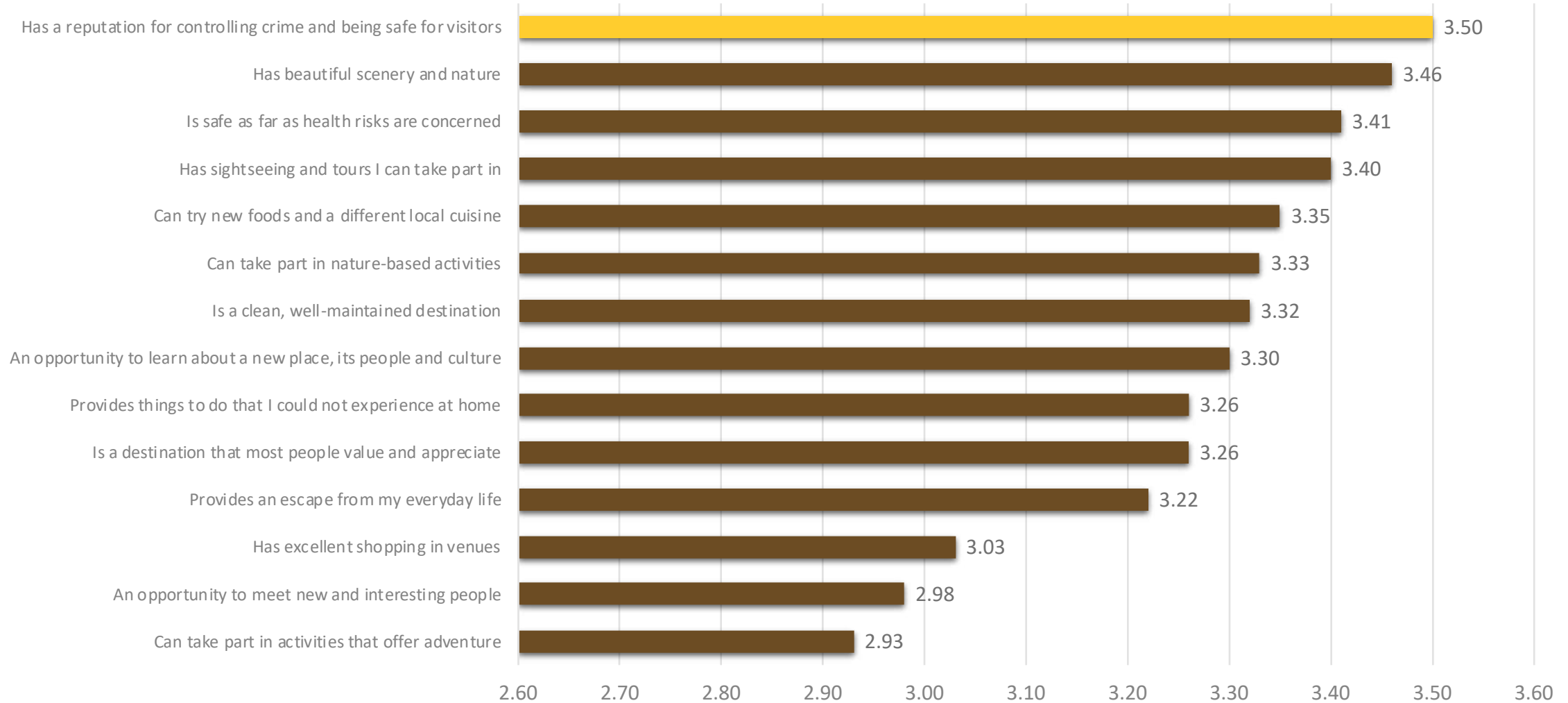
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=5



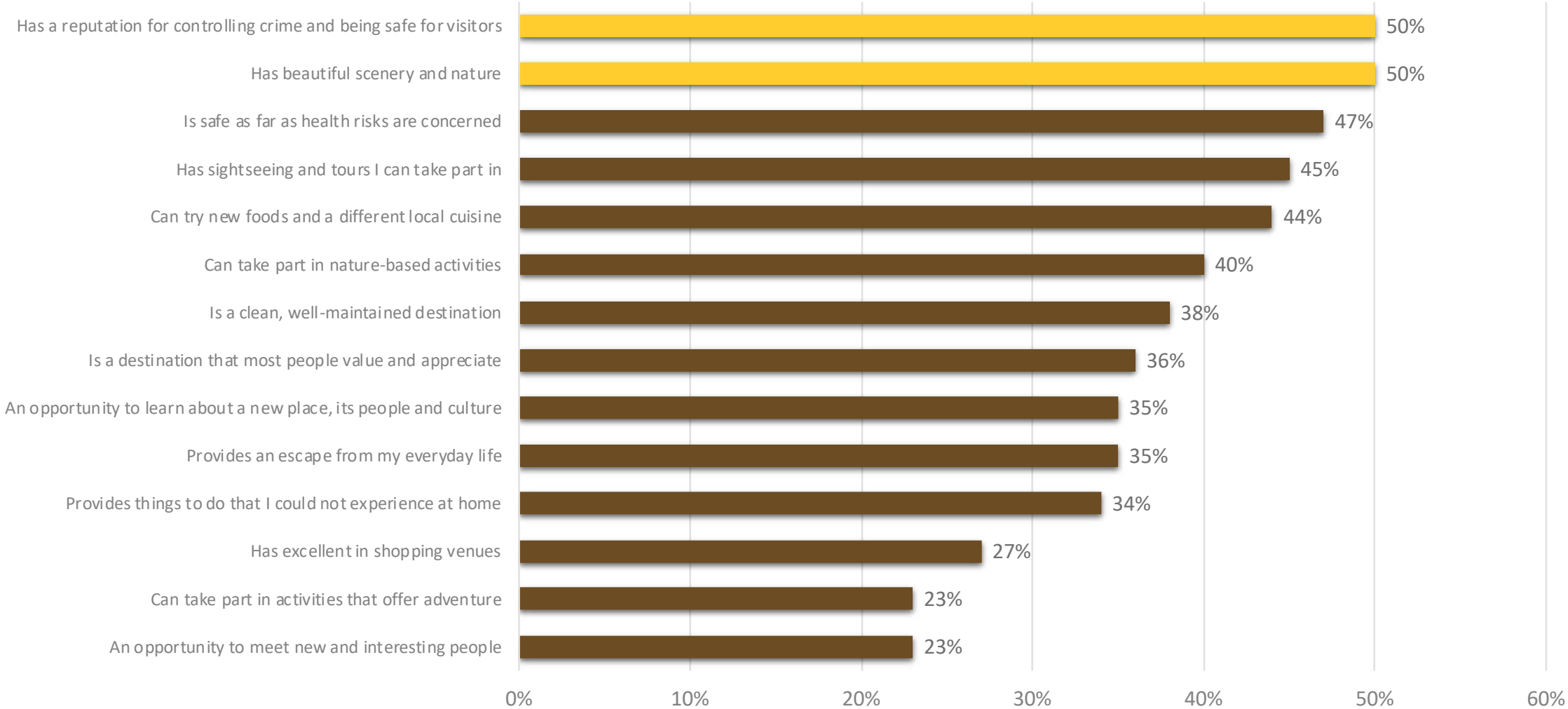
SELECTION FACTORS – SATISFACTION

MEAN SCORES 4PT SCALE

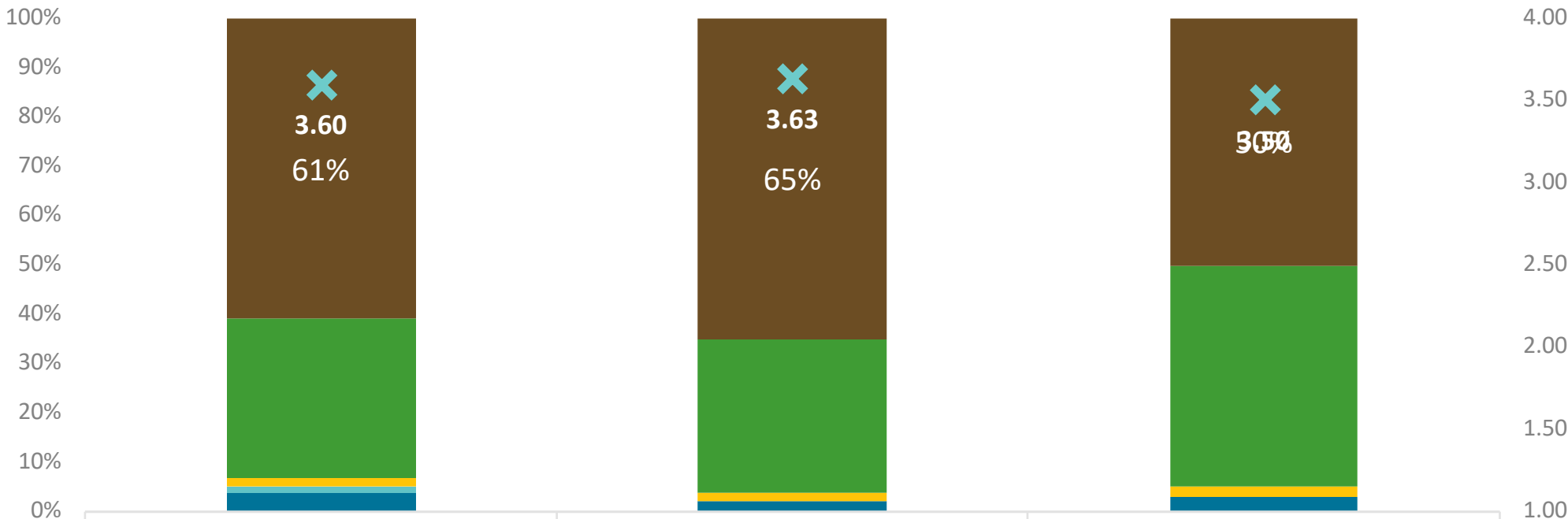


SELECTION FACTORS – SATISFACTION

TOP BOX (VERY GOOD)

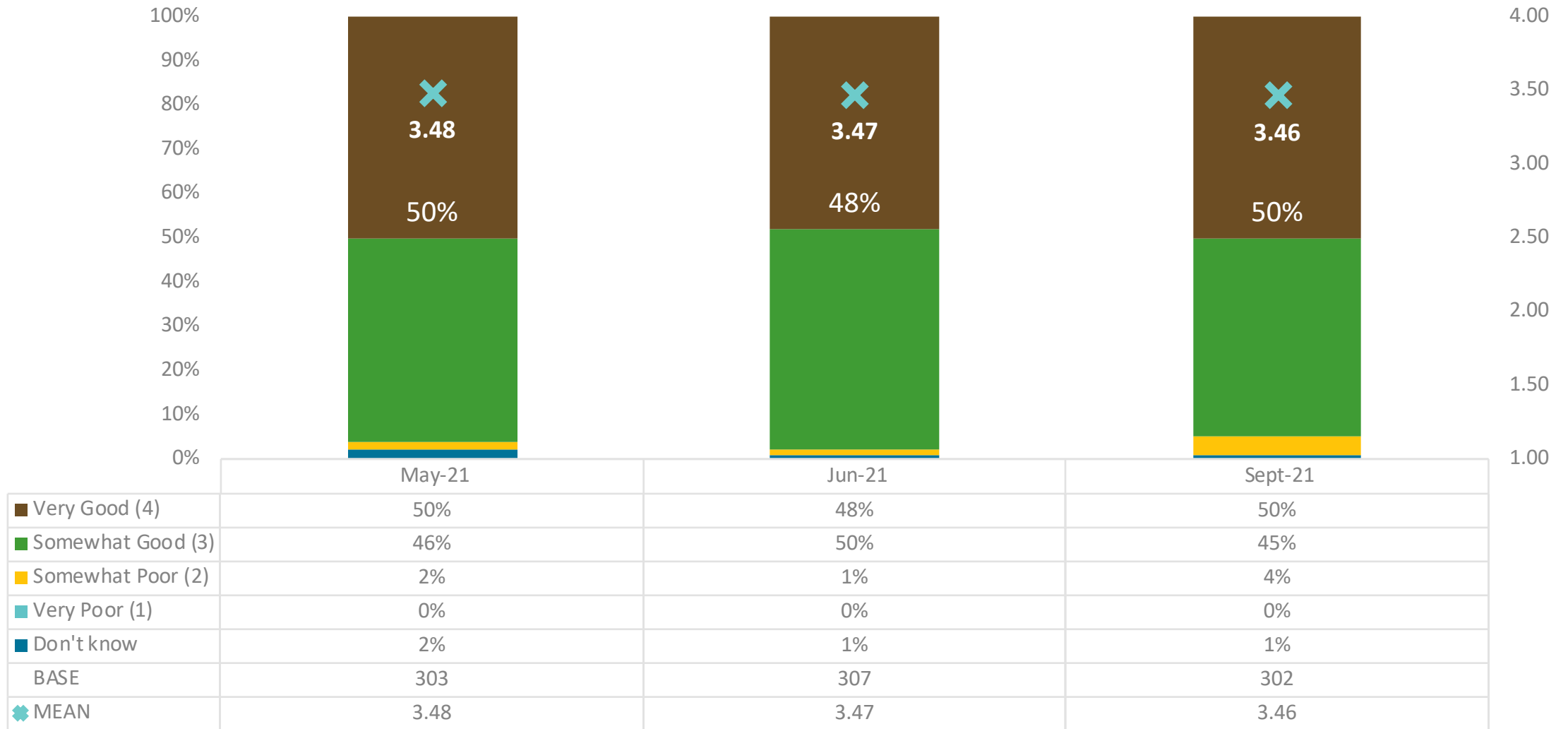


Has a reputation for controlling crime and being safe for visitors

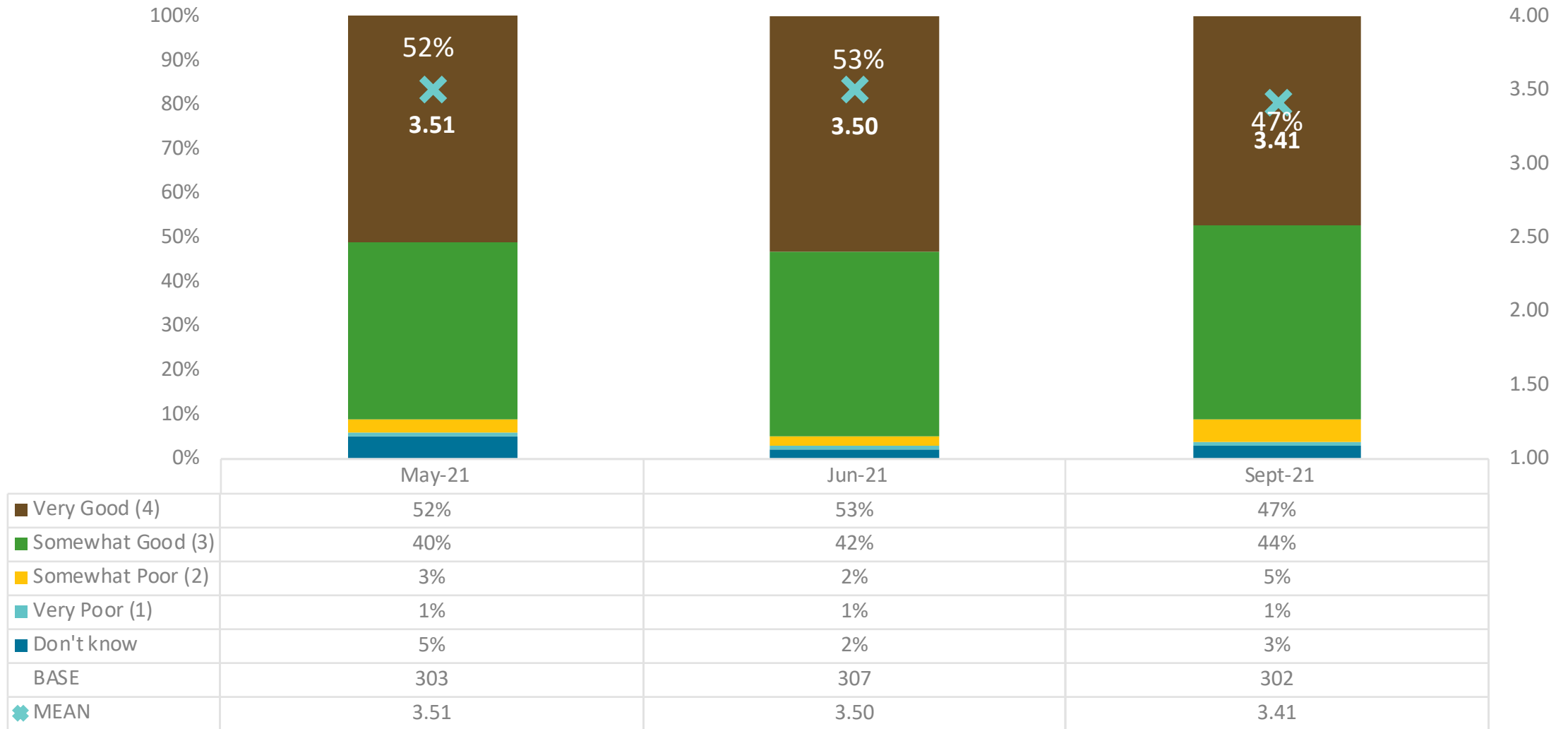


	May-21	Jun-21	Sept-21
Very Good (4)	61%	65%	50%
Somewhat Good (3)	32%	31%	45%
Somewhat Poor (2)	2%	2%	2%
Very Poor (1)	1%	0%	
Don't know	4%	2%	3%
BASE	303	307	302
MEAN	3.60	3.63	3.50

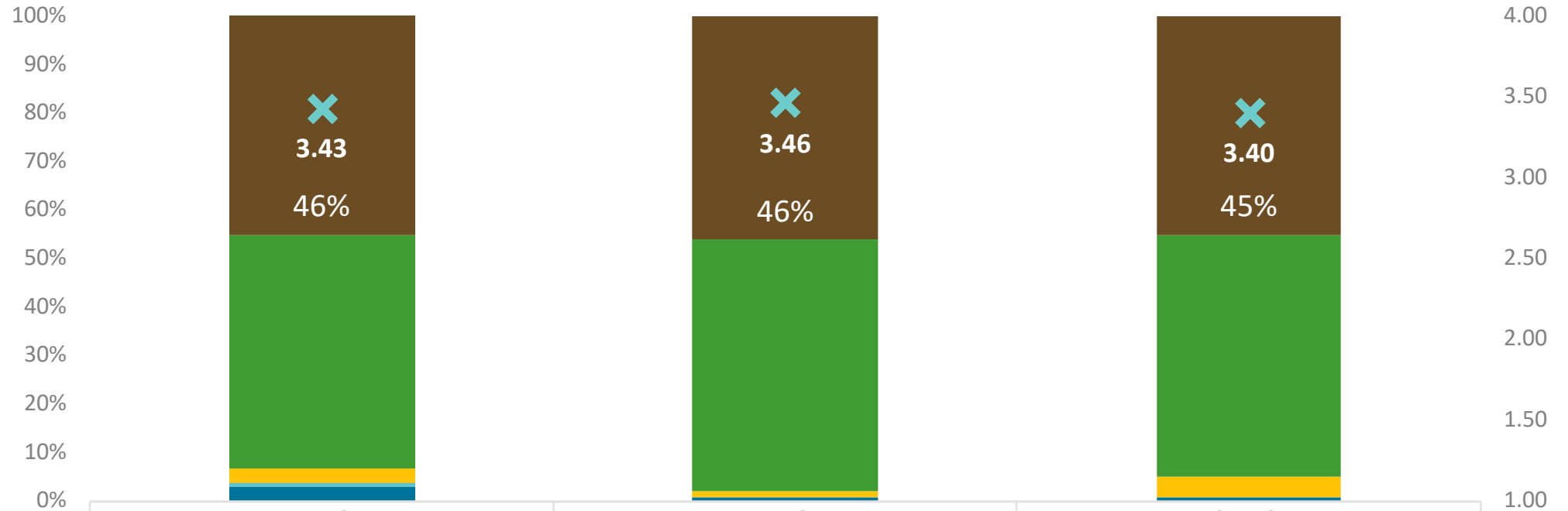
Has beautiful scenery and nature



Is safe as far as health risks are concerned

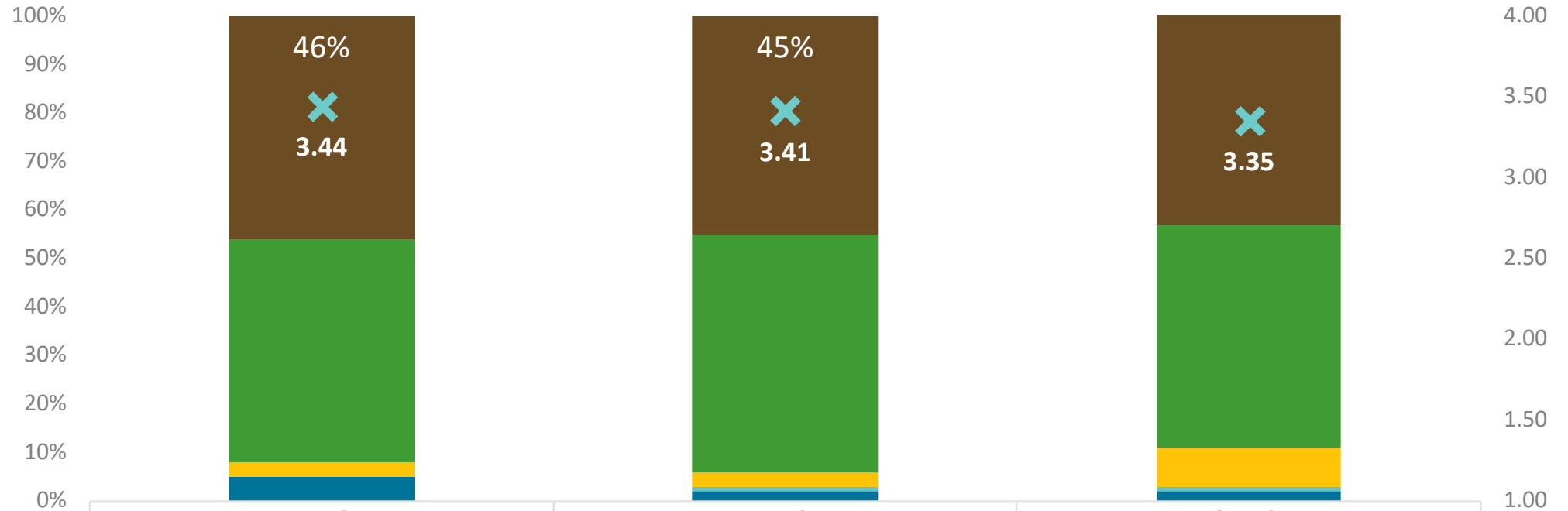


Has sightseeing and tours I can take part in



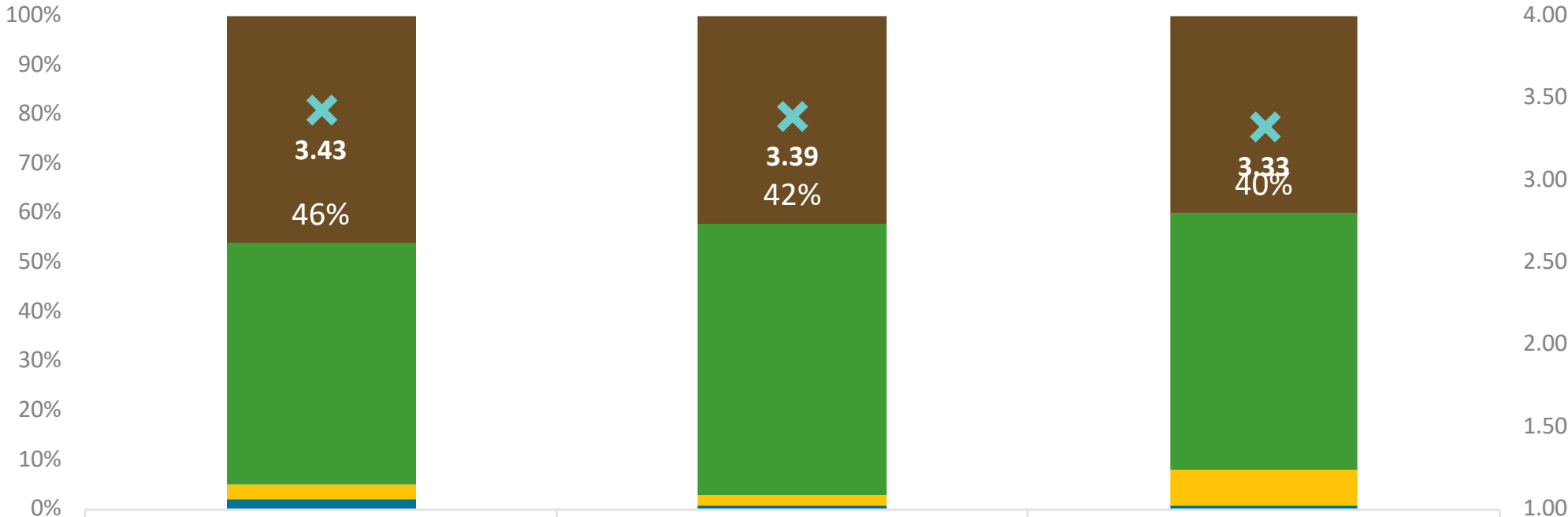
	May-21	Jun-21	Sept-21
Very Good (4)	46%	46%	45%
Somewhat Good (3)	48%	52%	50%
Somewhat Poor (2)	3%	1%	4%
Very Poor (1)	1%		0%
Don't know	3%	1%	1%
BASE	303	307	302
MEAN	3.43	3.46	3.40

Can try new foods and a different local cuisine



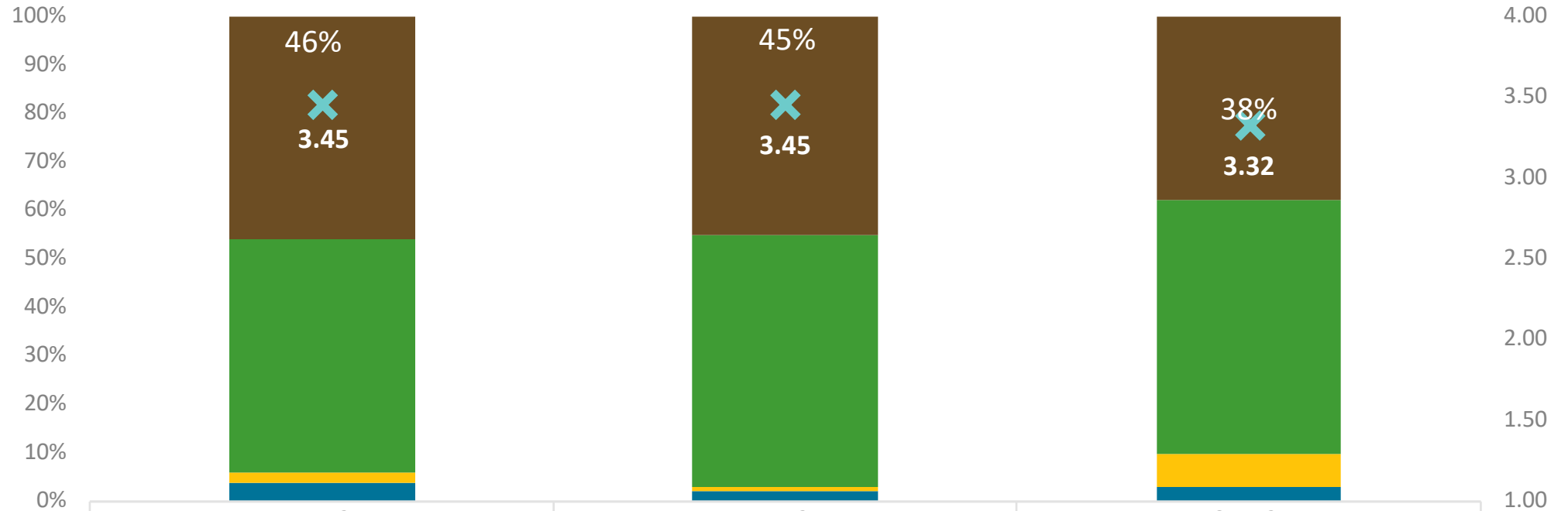
	May-21	Jun-21	Sept-21
Very Good (4)	46%	45%	44%
Somewhat Good (3)	46%	49%	46%
Somewhat Poor (2)	3%	3%	8%
Very Poor (1)	0%	1%	1%
Don't know	5%	2%	2%
BASE	303	307	302
MEAN	3.44	3.41	3.35

Can take part in nature-based activities



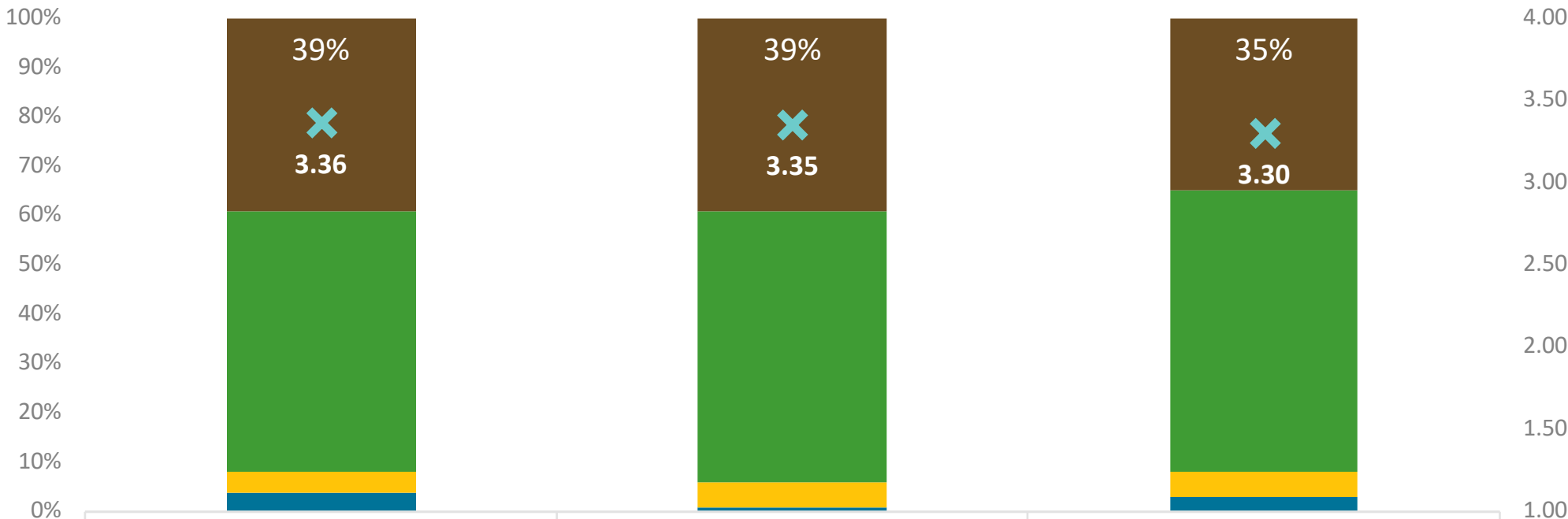
	May-21	Jun-21	Sept-21
Very Good (4)	46%	42%	40%
Somewhat Good (3)	49%	55%	52%
Somewhat Poor (2)	3%	2%	7%
Very Poor (1)	0%	0%	0%
Don't know	2%	1%	1%
BASE	303	307	302
MEAN	3.43	3.39	3.33

Is a clean, well-maintained destination



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

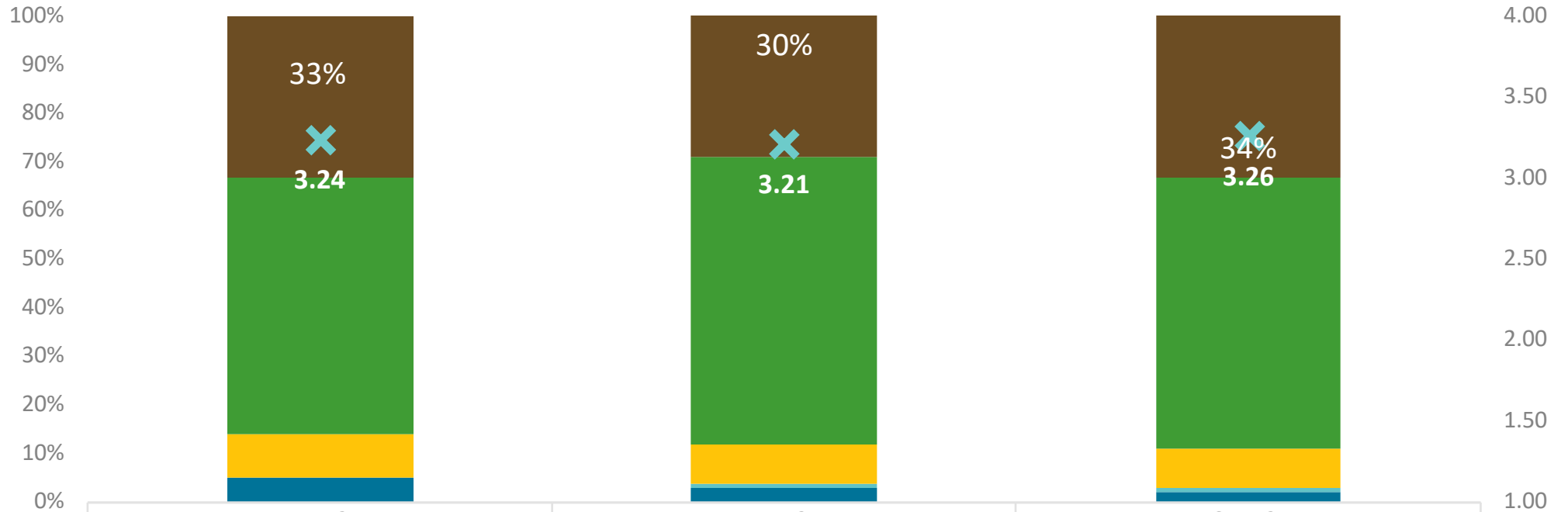
An opportunity to learn about a new place, its people and culture



	May-21	Jun-21	Sept-21
Very Good (4)	39%	39%	35%
Somewhat Good (3)	53%	55%	57%
Somewhat Poor (2)	4%	5%	5%
Very Poor (1)			0%
Don't know	4%	1%	3%
BASE	303	307	302
MEAN	3.36	3.35	3.30

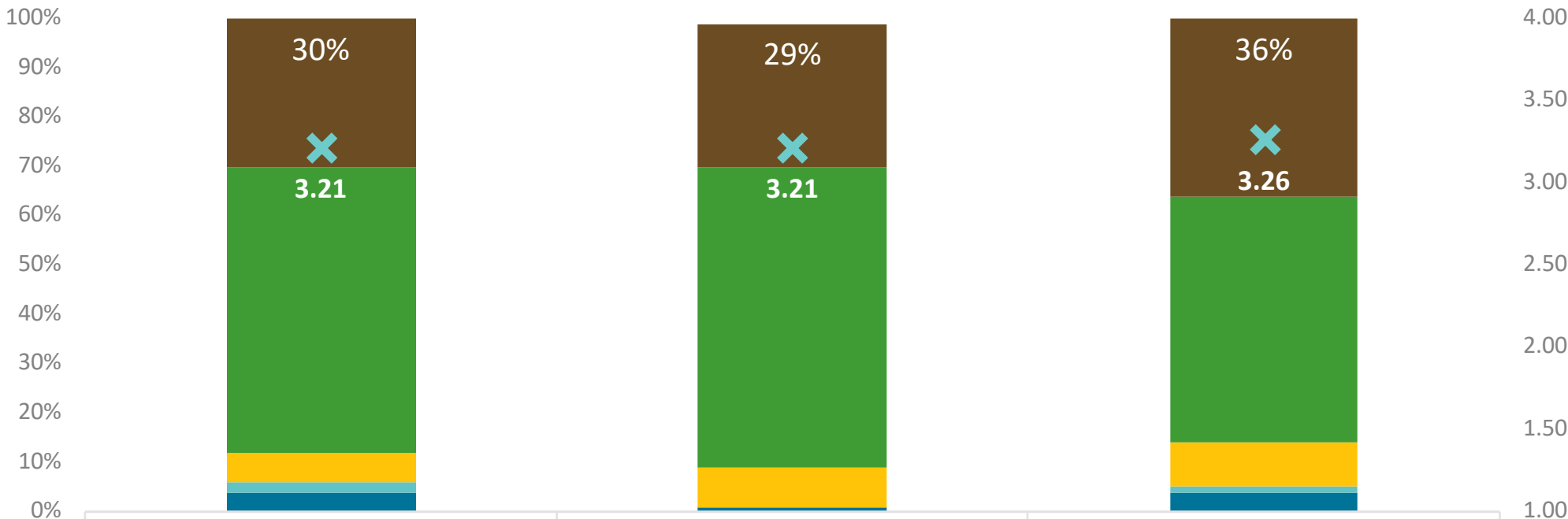


Provides things to do that I could not experience at home



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

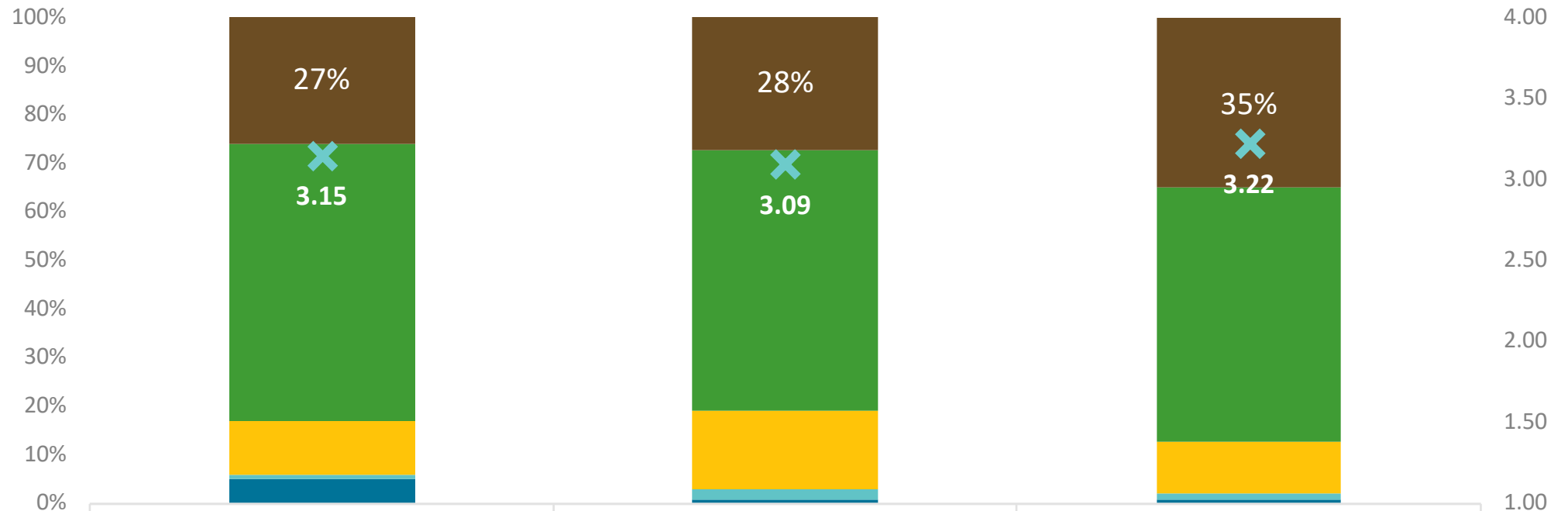
Is a destination that most people value and appreciate



	May-21	Jun-21	Sept-21
Very Good (4)	30%	29%	36%
Somewhat Good (3)	58%	61%	50%
Somewhat Poor (2)	6%	8%	9%
Very Poor (1)	2%	0%	1%
Don't know	4%	1%	4%
BASE	303	307	302
MEAN	3.21	3.21	3.26

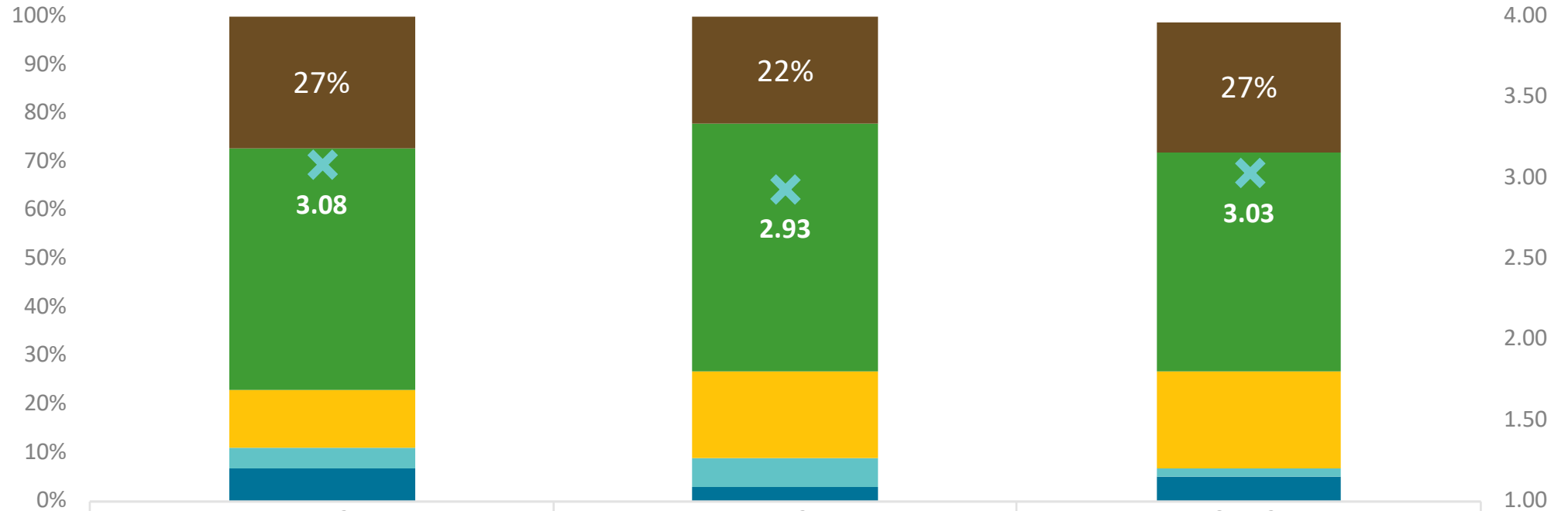


Provides an escape from my everyday life



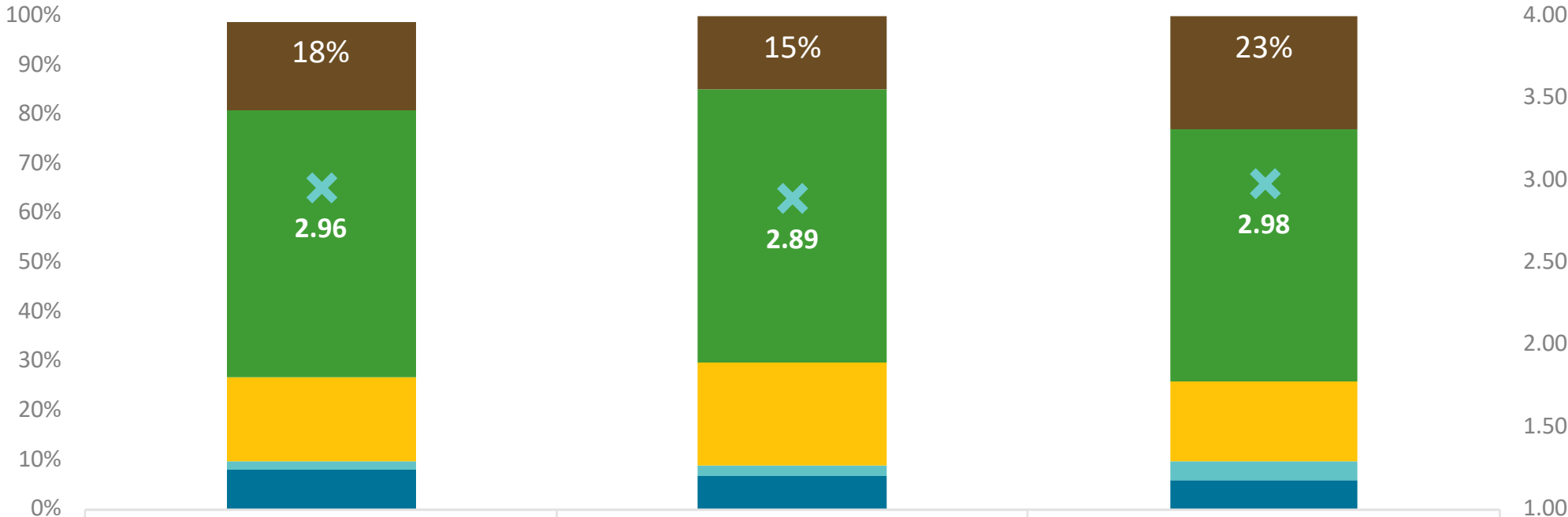
	May-21	Jun-21	Sept-21
Very Good (4)	27%	28%	35%
Somewhat Good (3)	57%	54%	52%
Somewhat Poor (2)	11%	16%	11%
Very Poor (1)	1%	2%	1%
Don't know	5%	1%	1%
BASE	303	307	302
MEAN	3.15	3.09	3.22

Has excellent shopping in venues



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

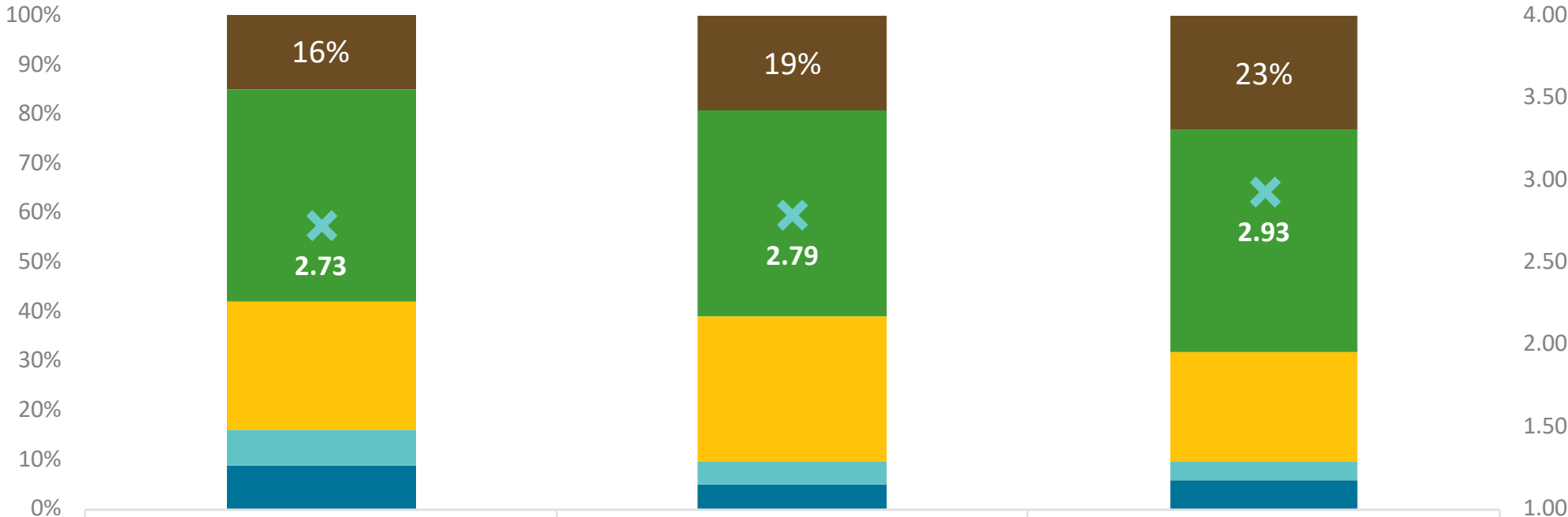
An opportunity to meet new and interesting people



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



Can take part in activities that offer adventure

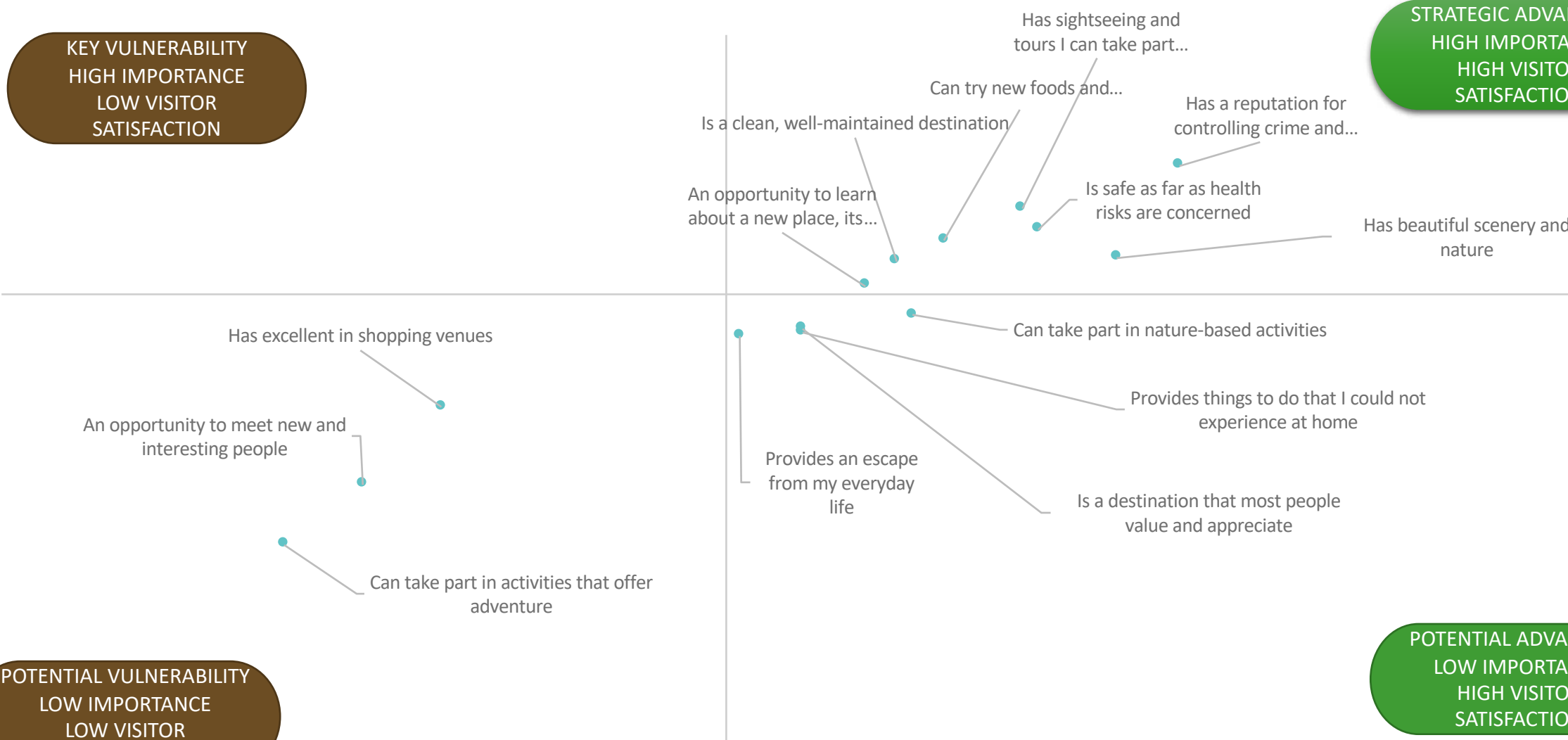


	May-21	Jun-21	Sept-21
Very Good (4)	16%	19%	23%
Somewhat Good (3)	43%	42%	45%
Somewhat Poor (2)	26%	29%	22%
Very Poor (1)	7%	5%	4%
Don't know	9%	5%	6%
BASE	303	307	302
MEAN	2.73	2.79	2.93

NEED-GAP ANALYSIS

KEY VULNERABILITY
HIGH IMPORTANCE
LOW VISITOR
SATISFACTION

STRATEGIC ADVANTAGE
HIGH IMPORTANCE
HIGH VISITOR
SATISFACTION



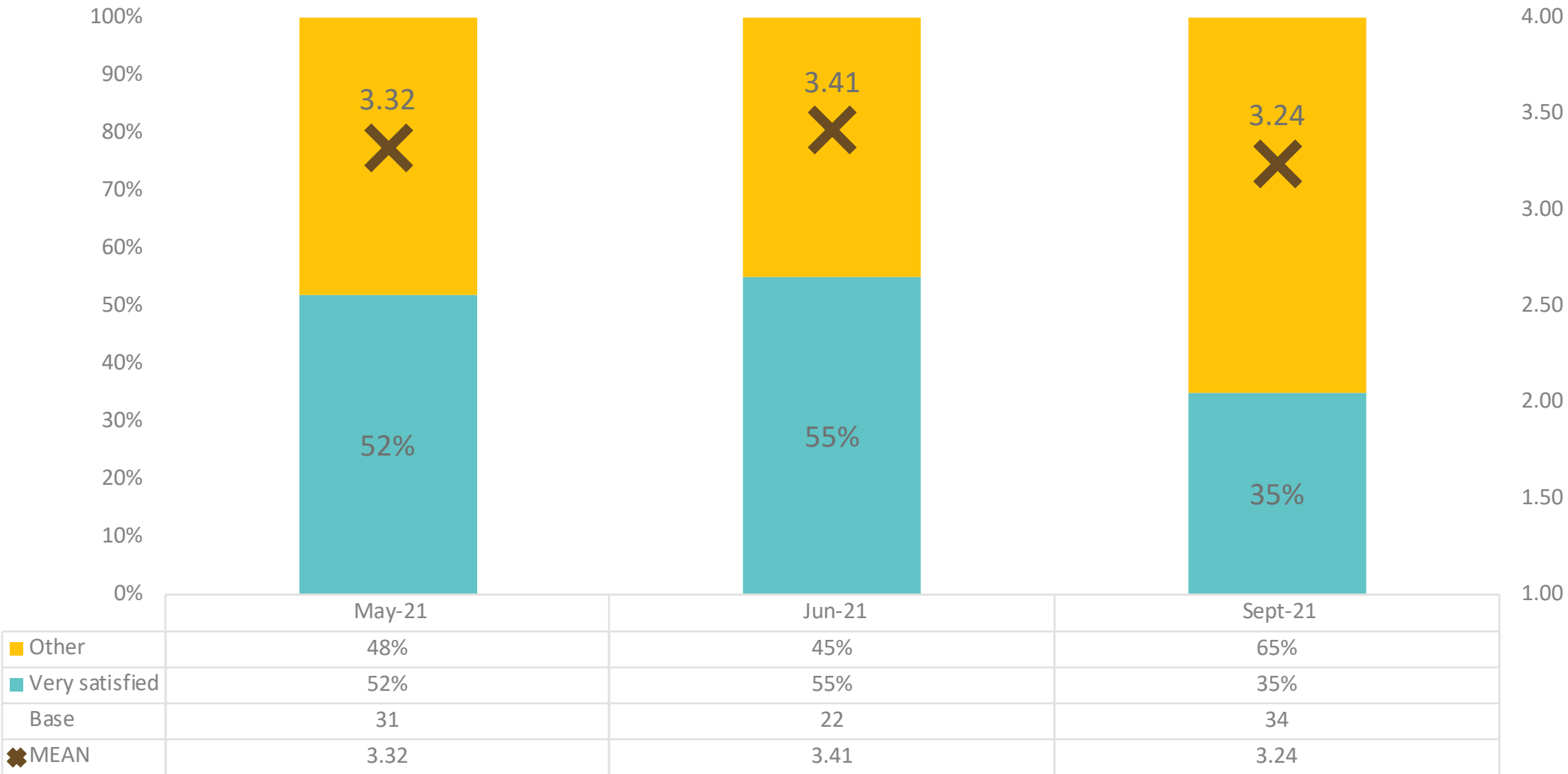
POTENTIAL VULNERABILITY
LOW IMPORTANCE
LOW VISITOR
SATISFACTION

POTENTIAL ADVANTAGE
LOW IMPORTANCE
HIGH VISITOR
SATISFACTION



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

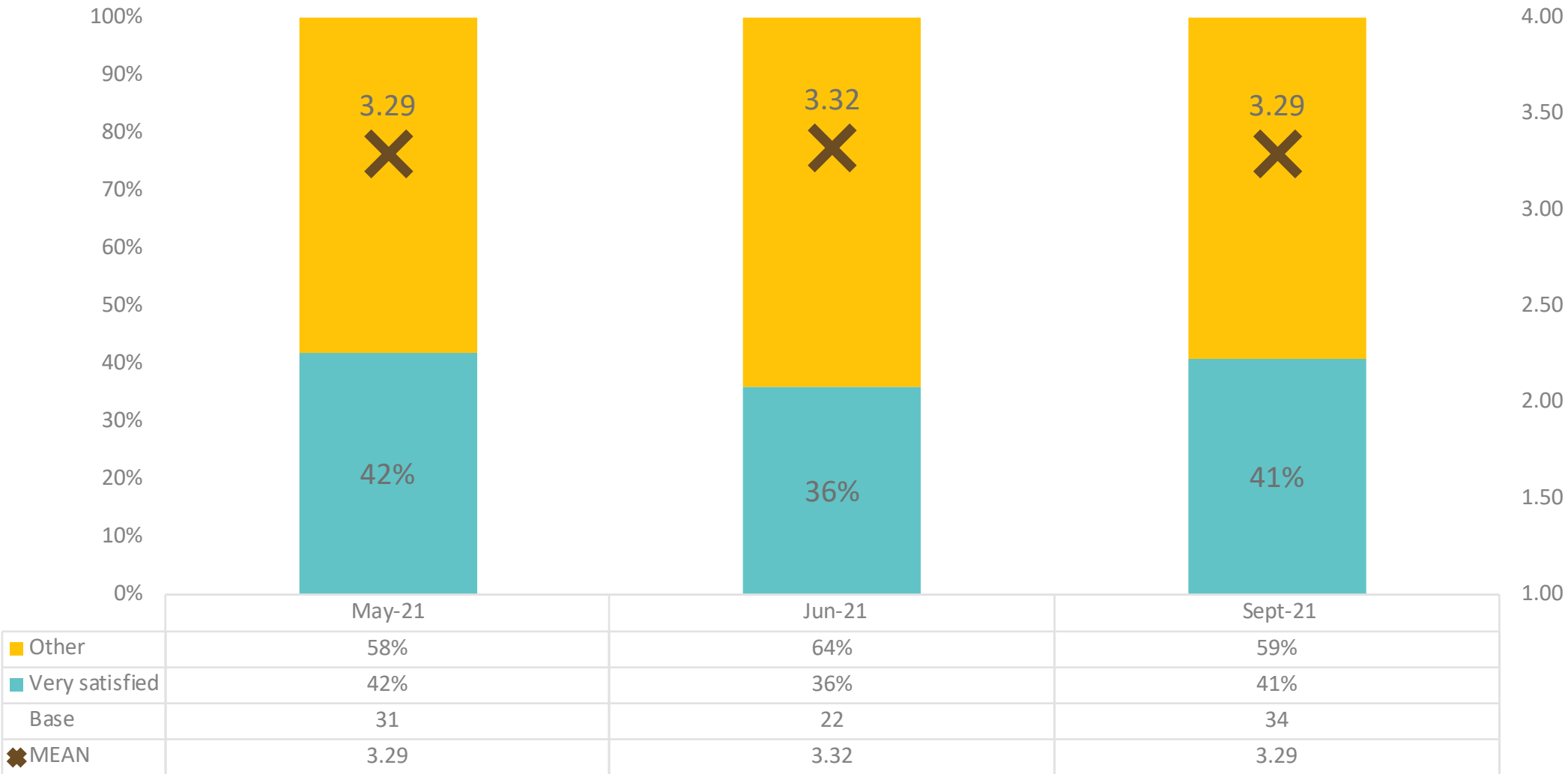


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

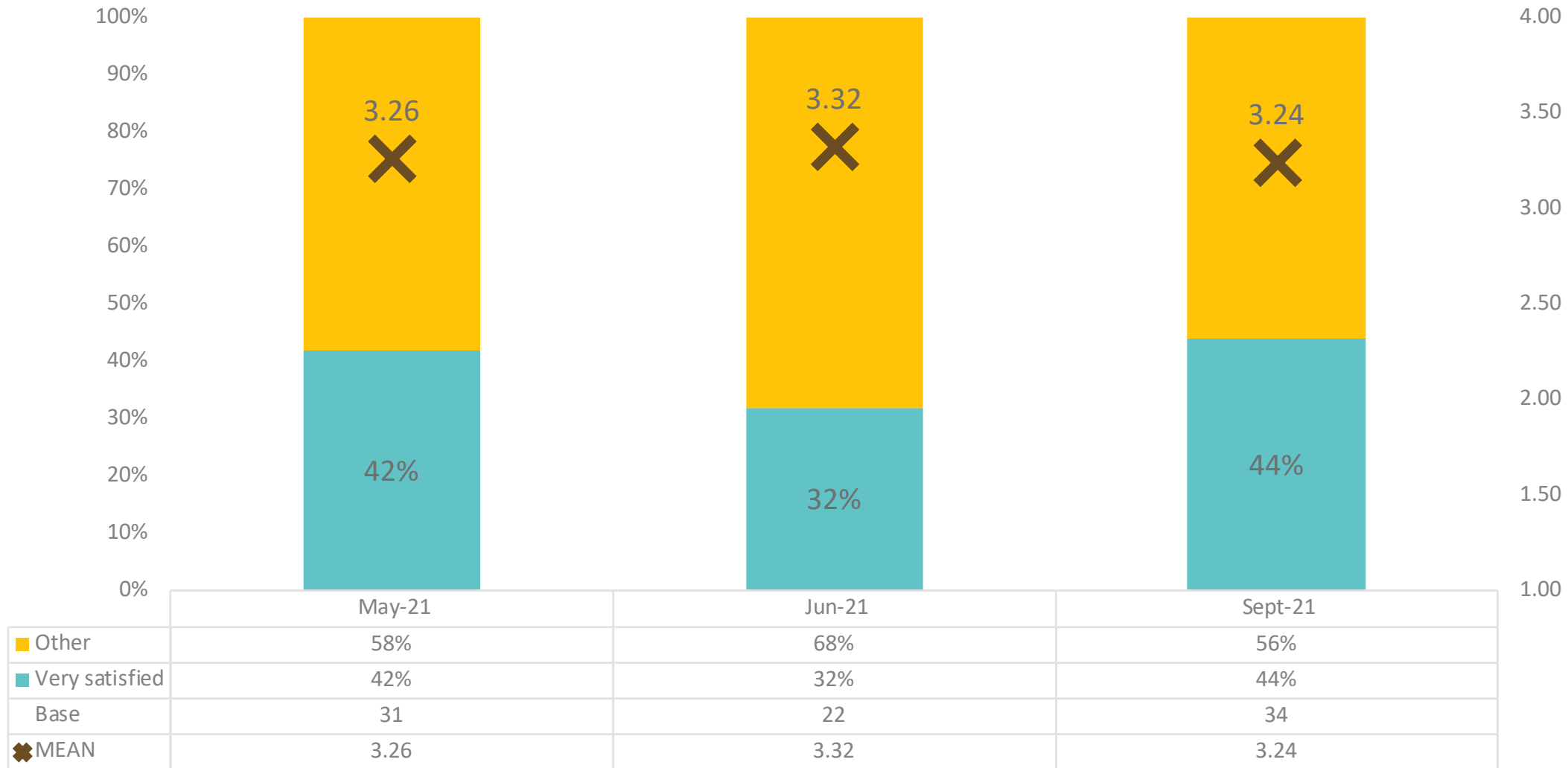


Caution
small
base



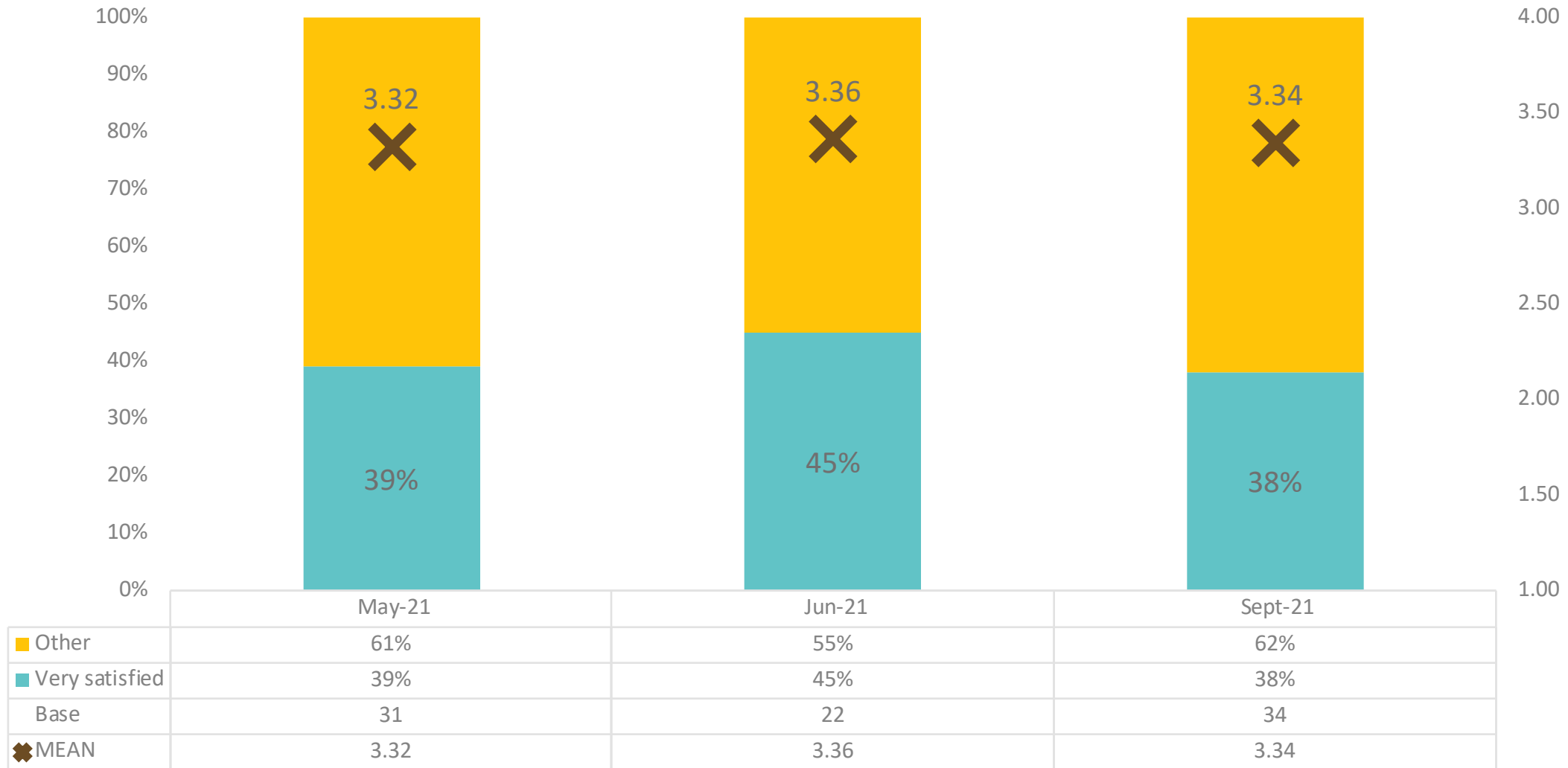
TRANSPORTATION OPTIONS – SATISFACTION

4PT RATING SCALE



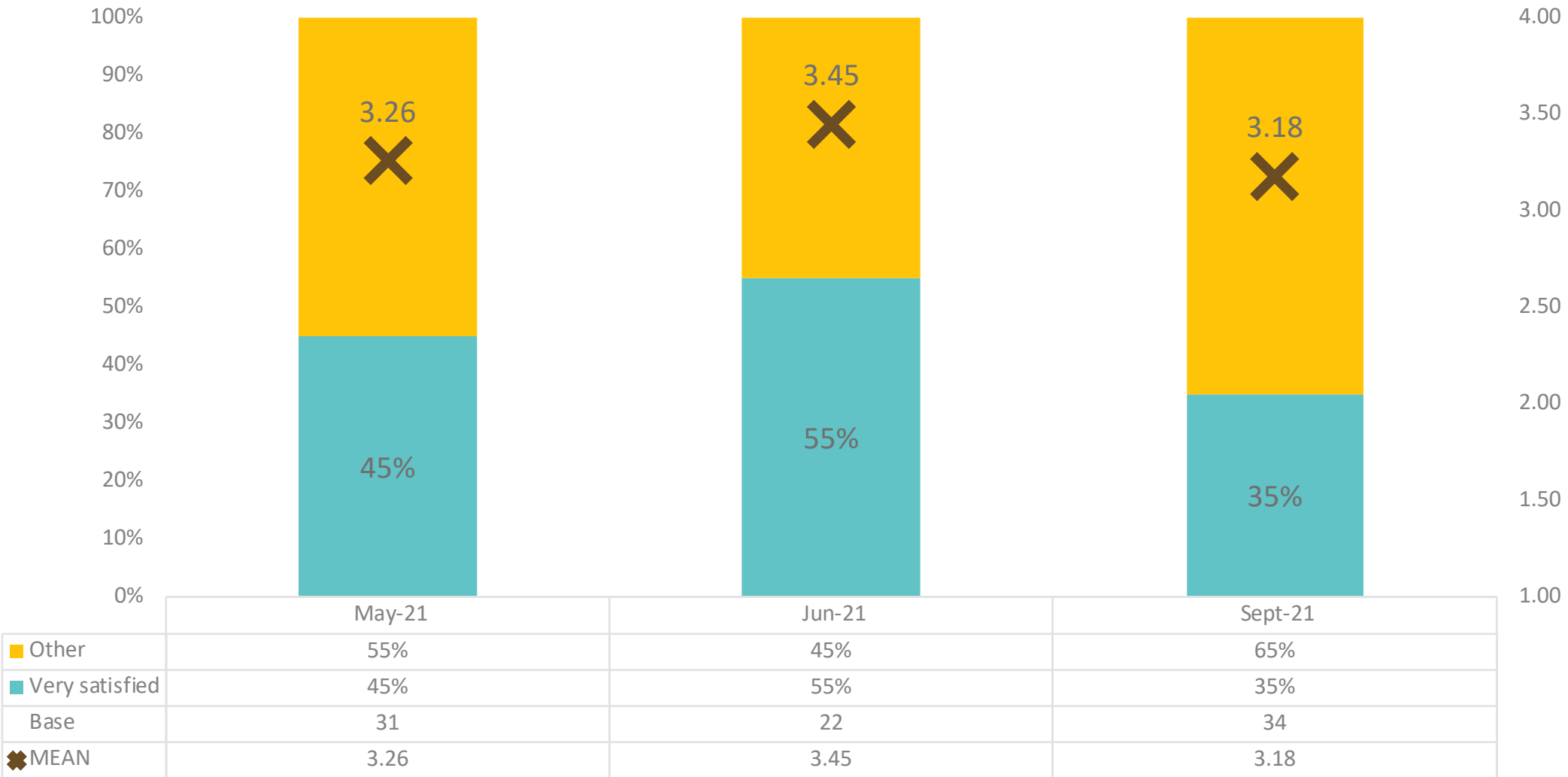
VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE



VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE

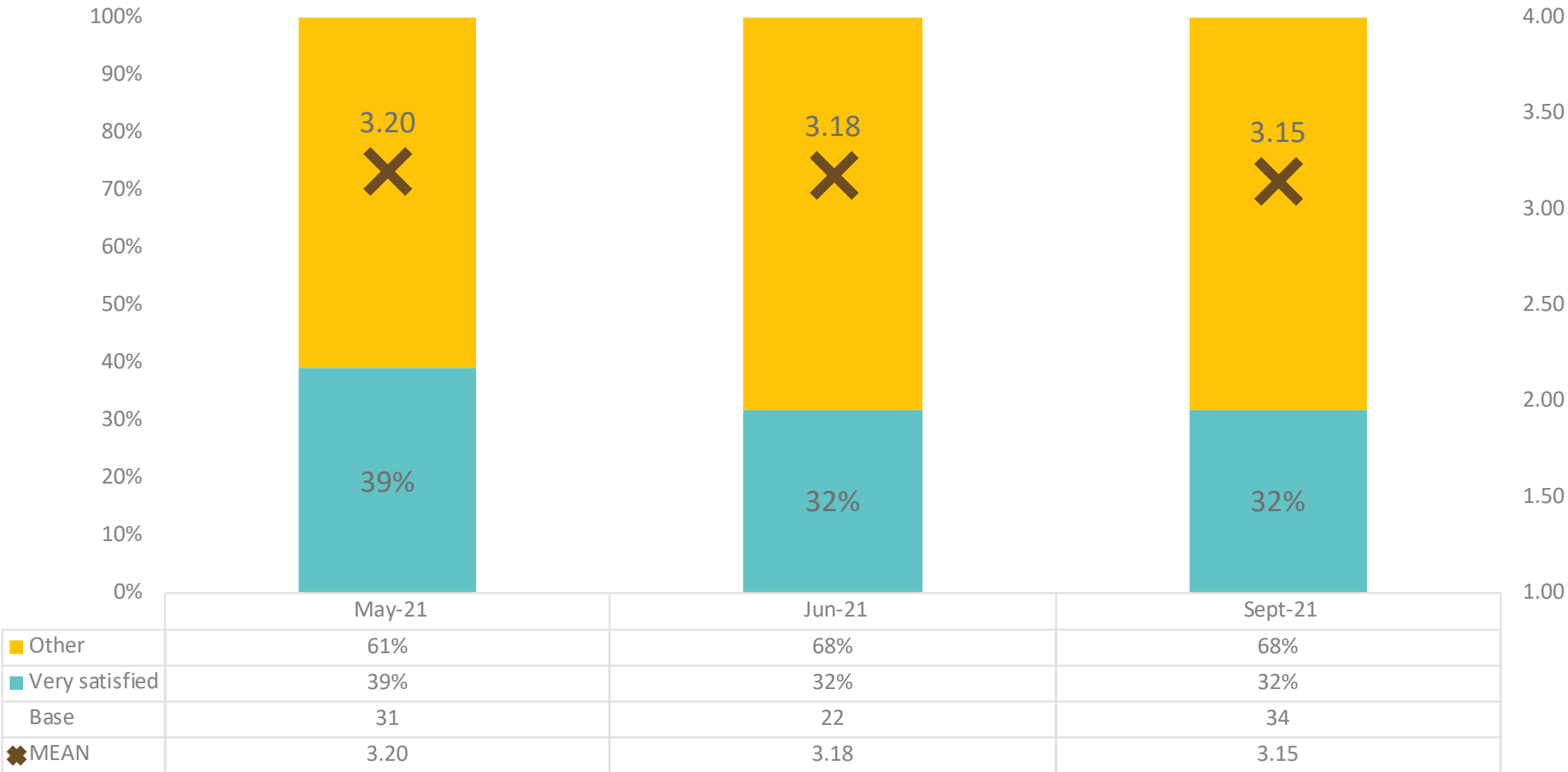


Caution
small
base



SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE

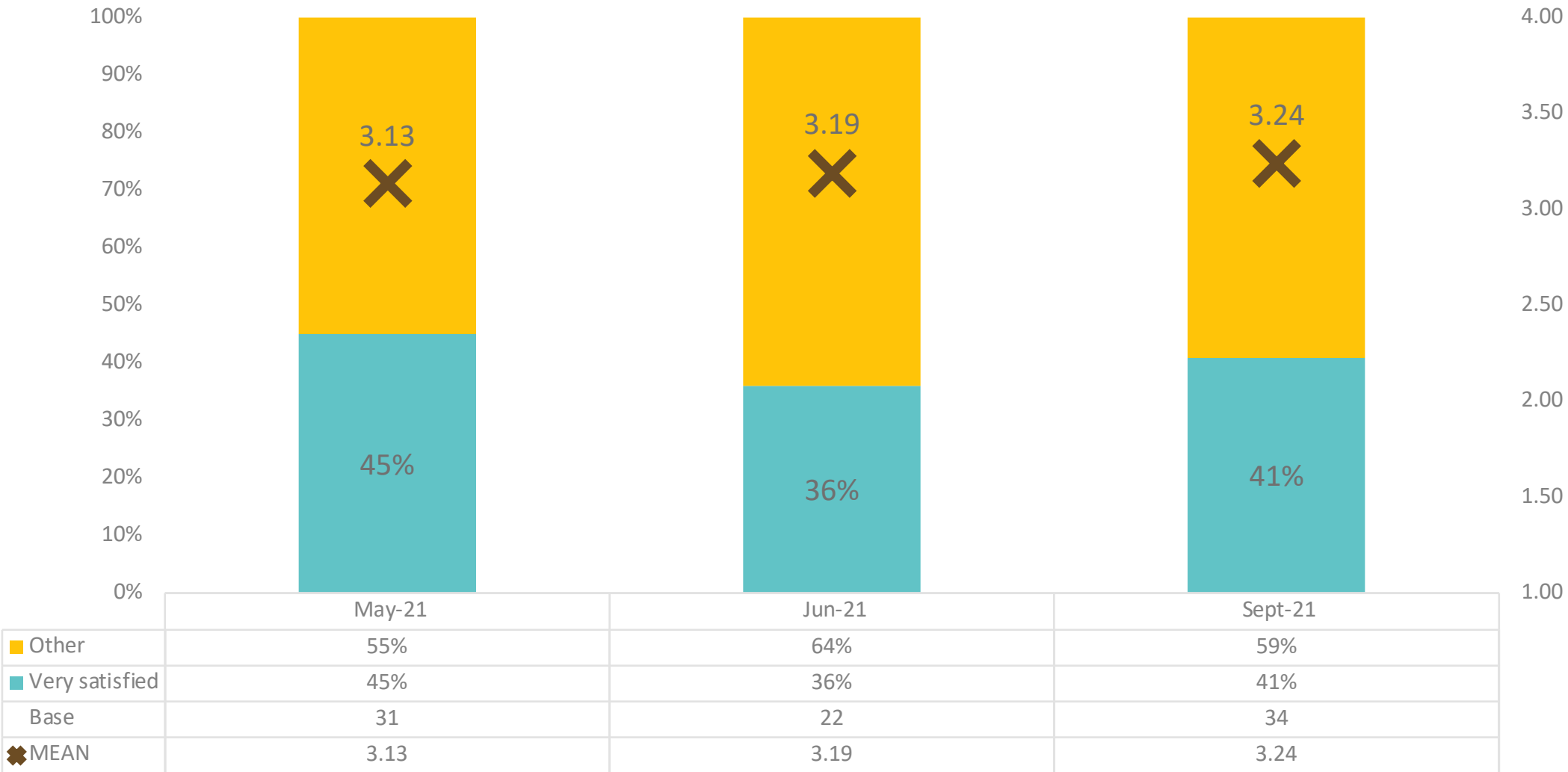


Caution
small
base



OVERALL VALUE – SATISFACTION

4PT RATING SCALE



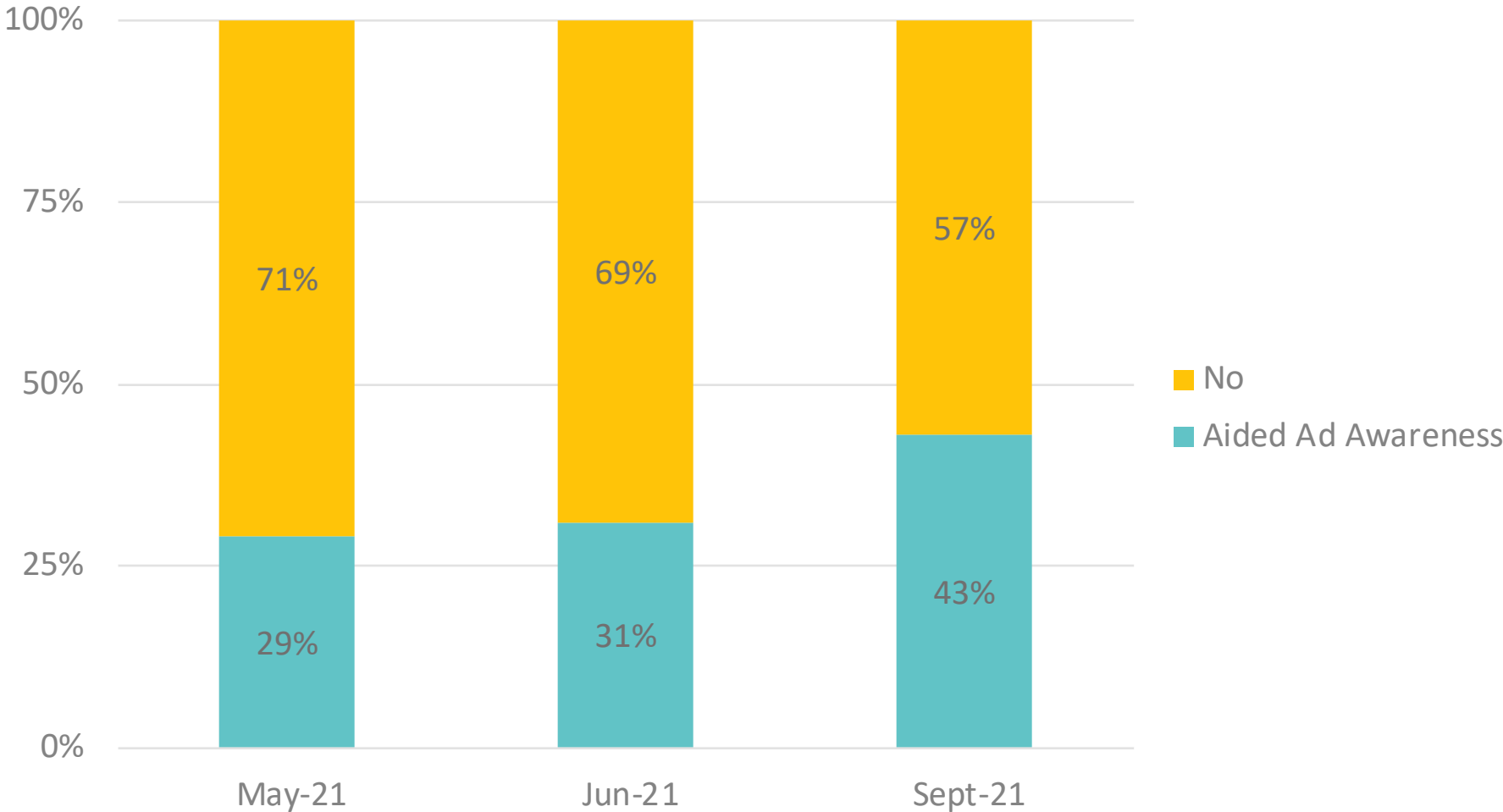


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

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



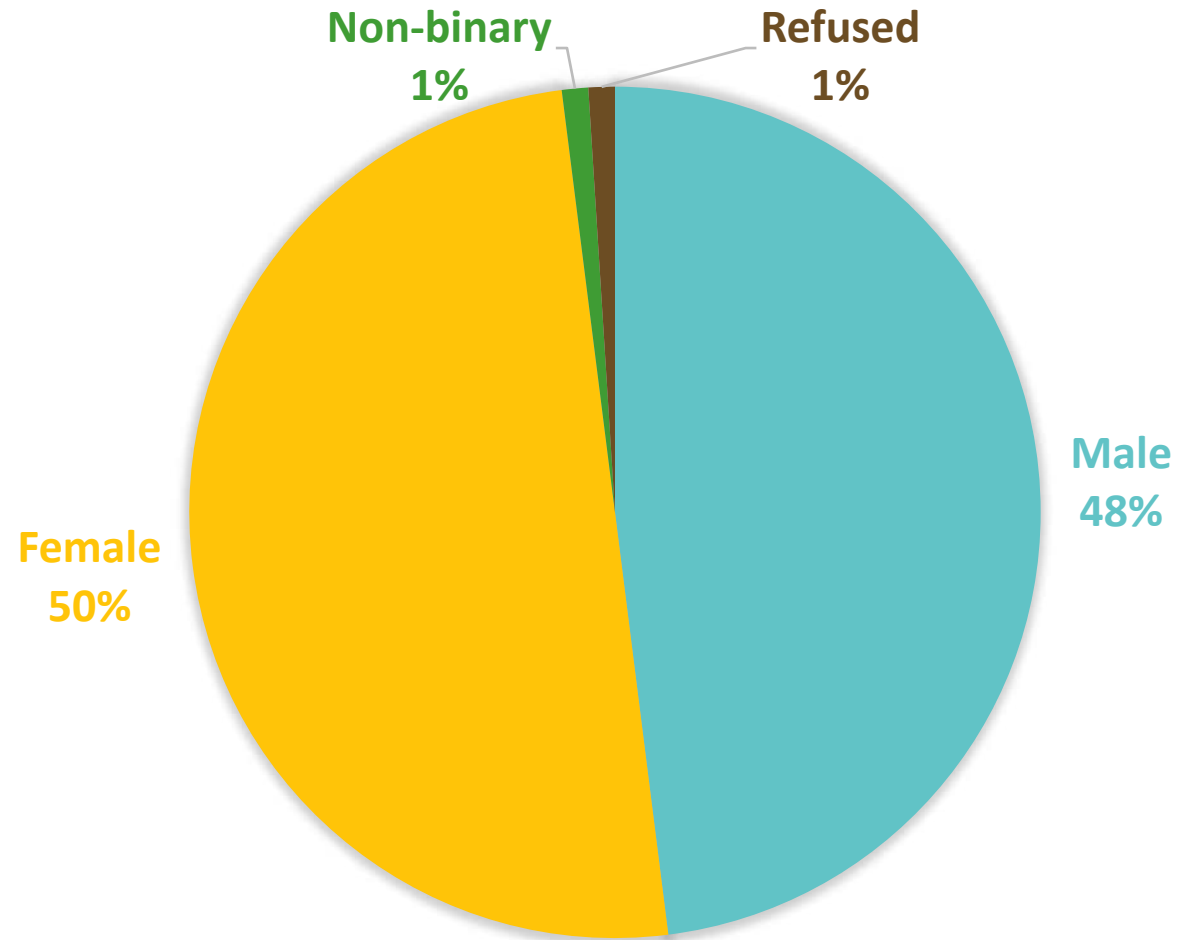


SECTION 5

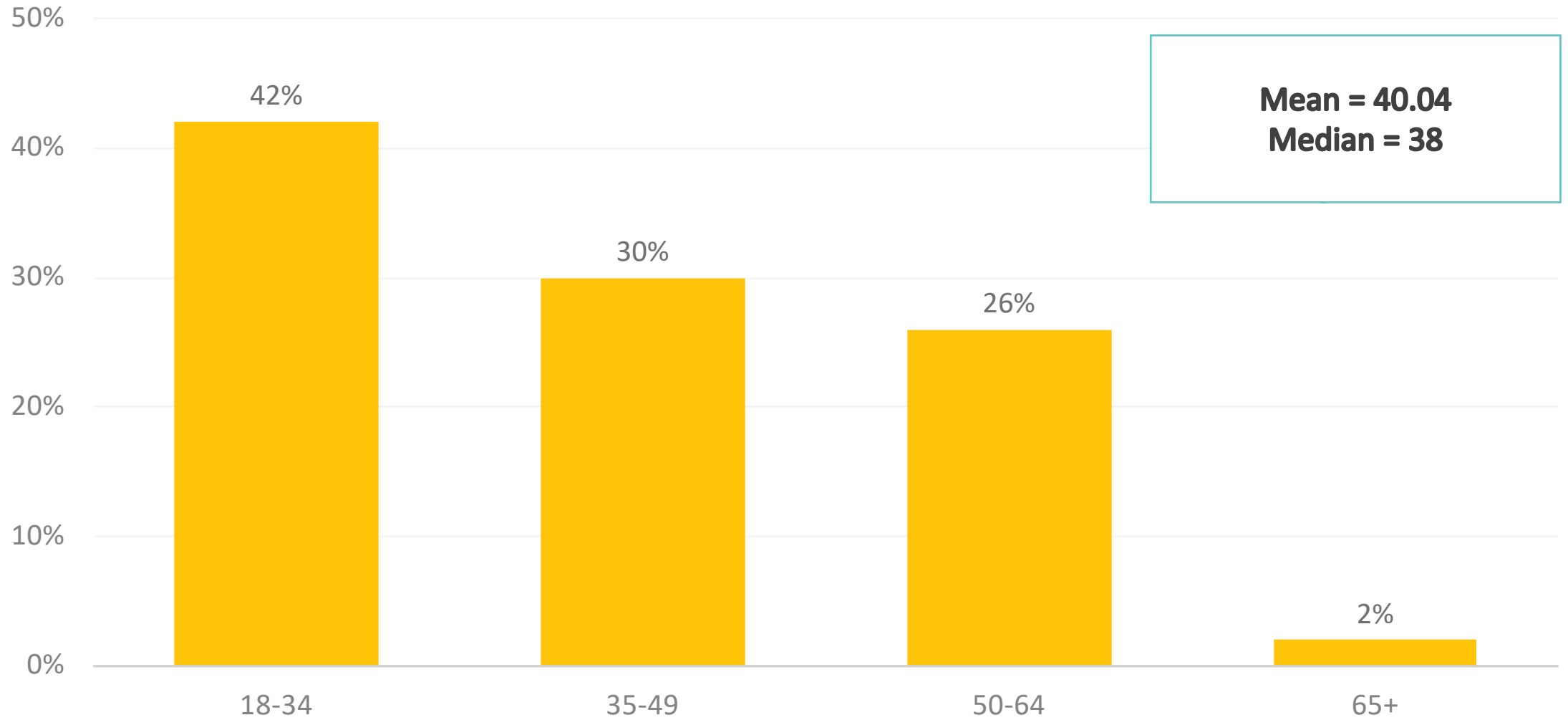
PROFILE OF RESPONDENTS



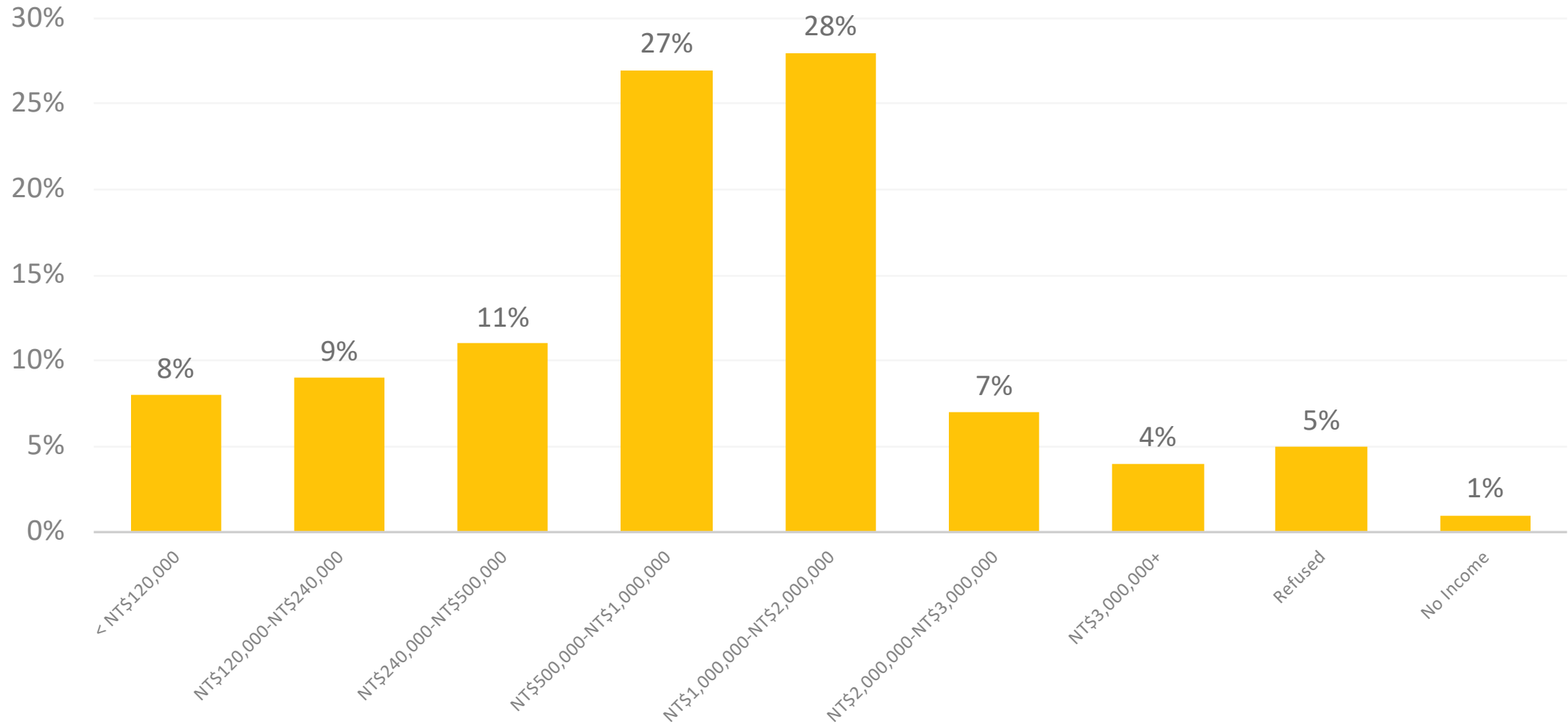
GENDER



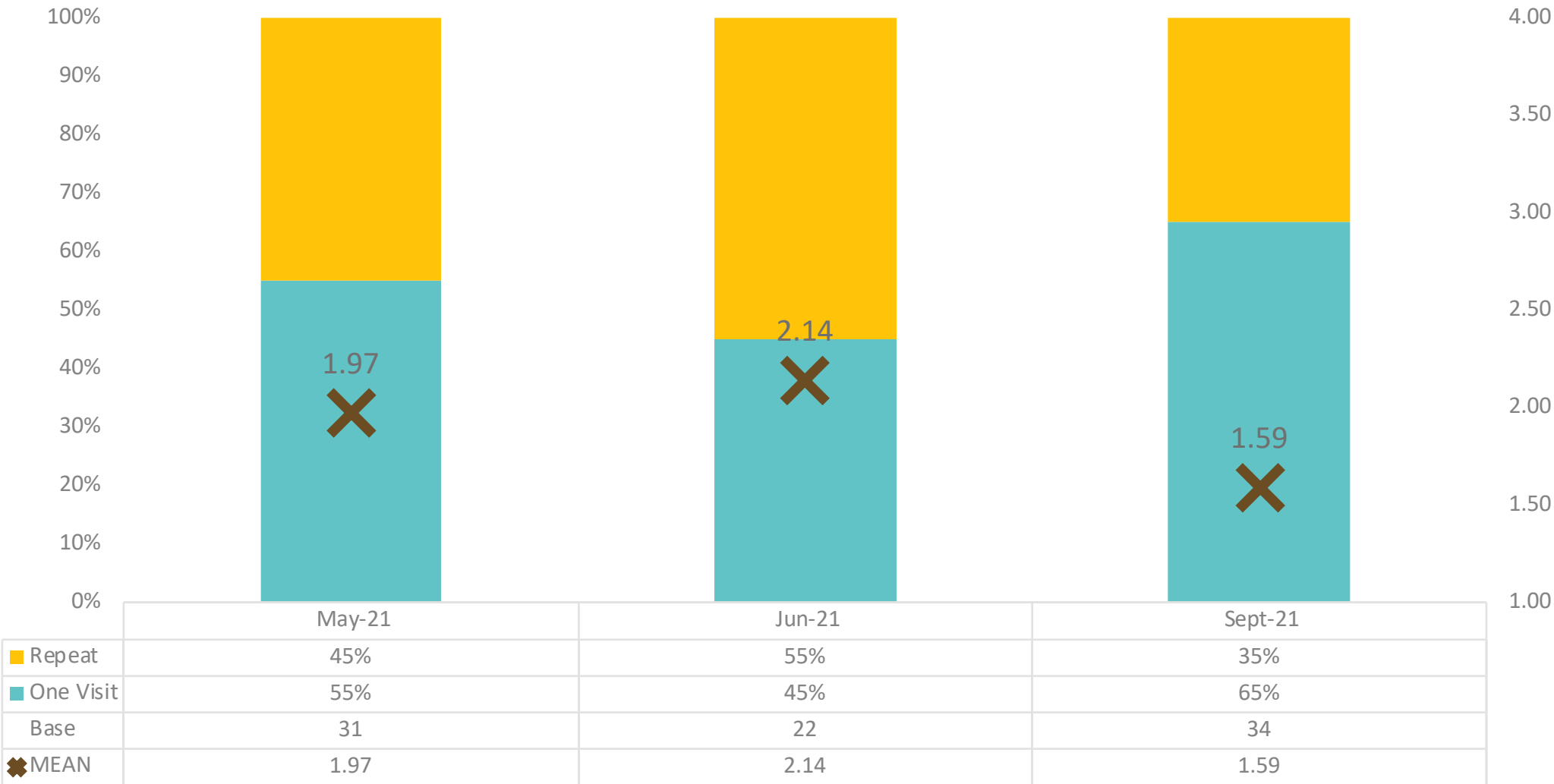
AGE



HOUSEHOLD INCOME



TRIPS TO GUAM



Caution
small
base

INTERNATIONAL TRAVEL – Trips in last five years

