



Guam Visitors Bureau

Korea In-Market Insight Report

JUNE 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 June 16-18, 2021. A total of 308 surveys were collected during this period.
- The margin of error for a sample of 308 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.



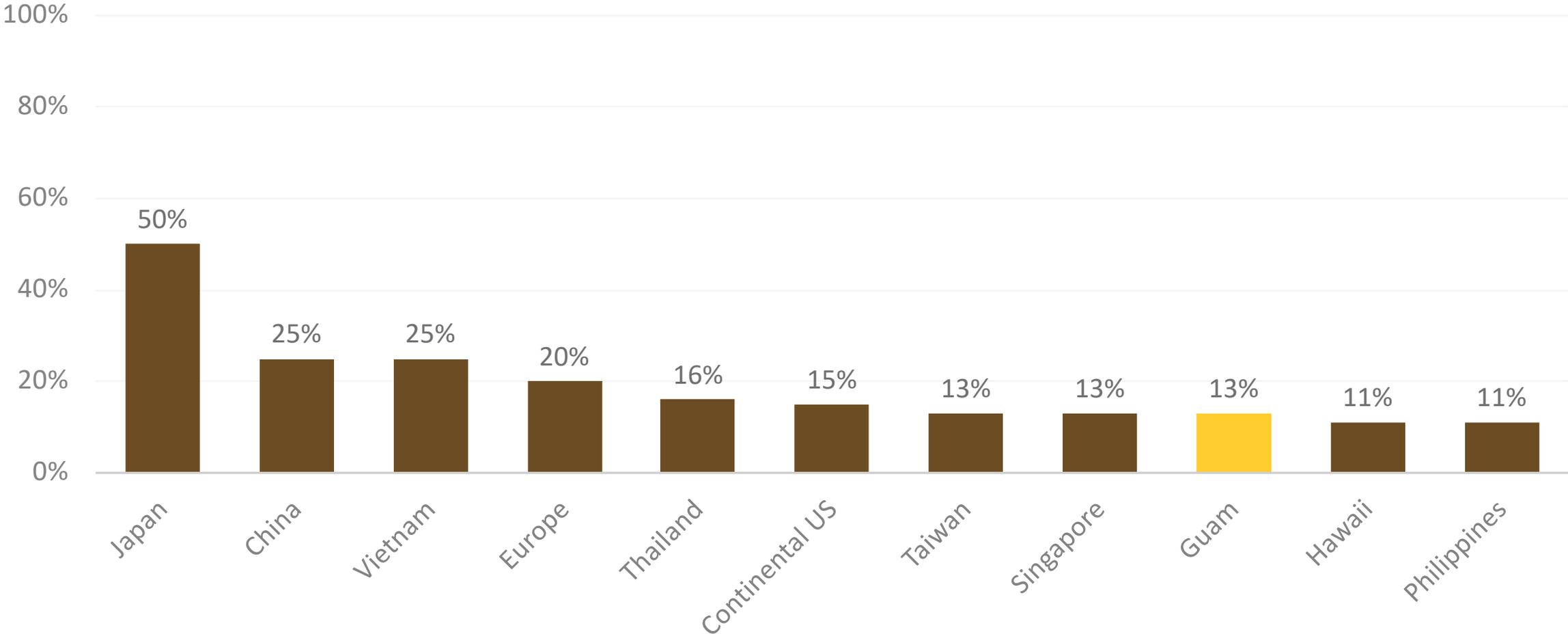


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



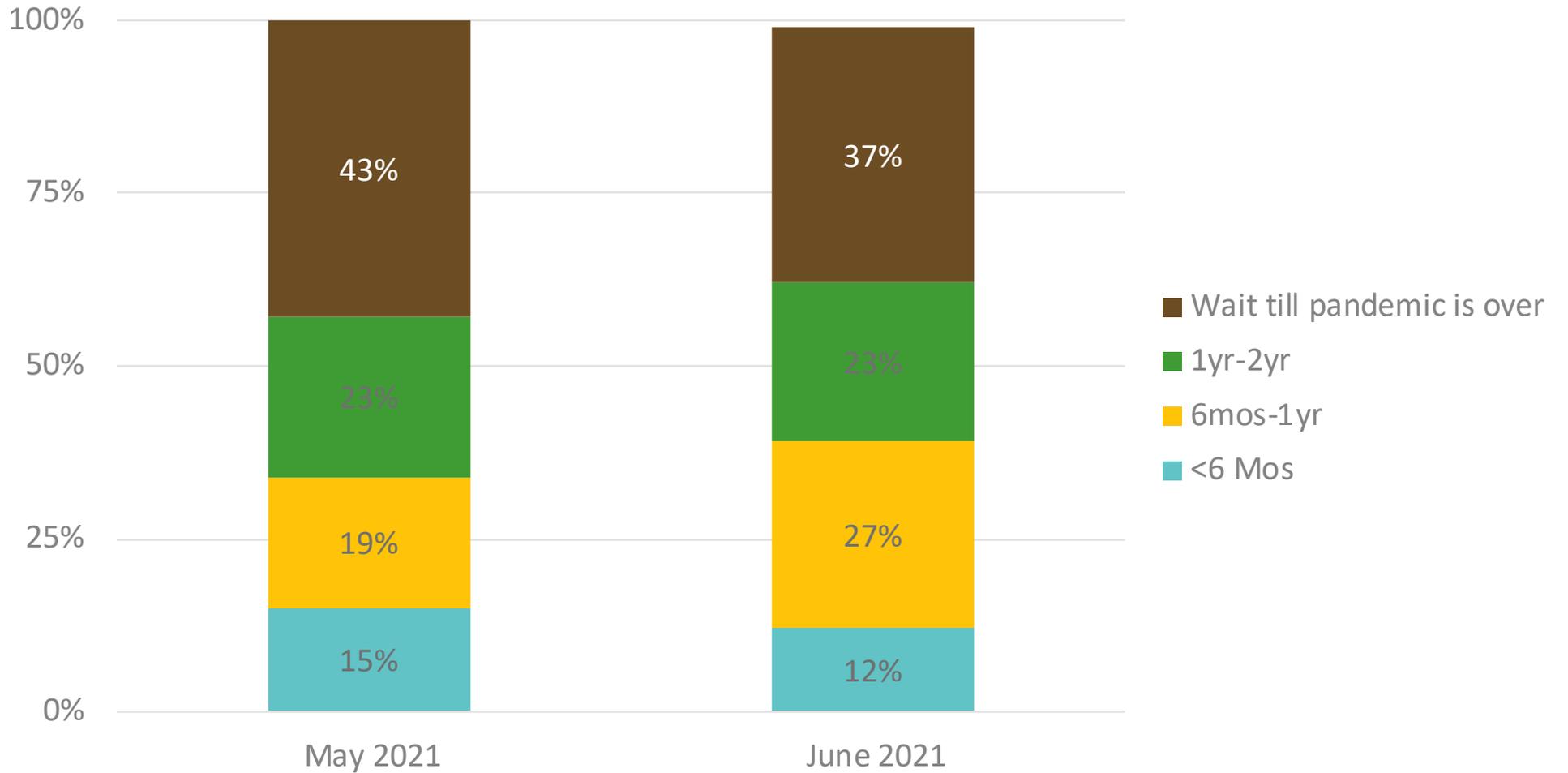
TRAVEL HISTORY – Tracking

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

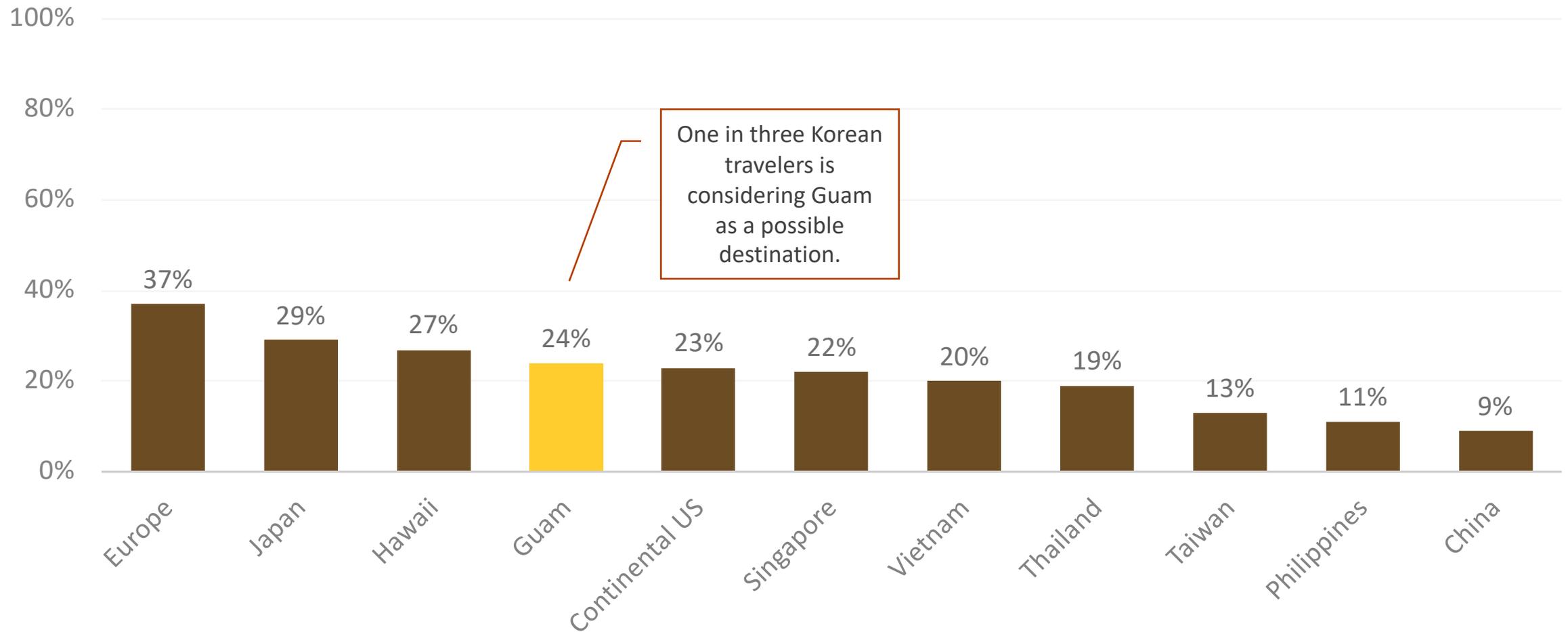


FUTURE TRAVEL PLANS

The proportion of Korean visitors who plan to travel internationally within the next six months to a year is up.



POTENTIAL FUTURE TRAVEL DESTINATIONS



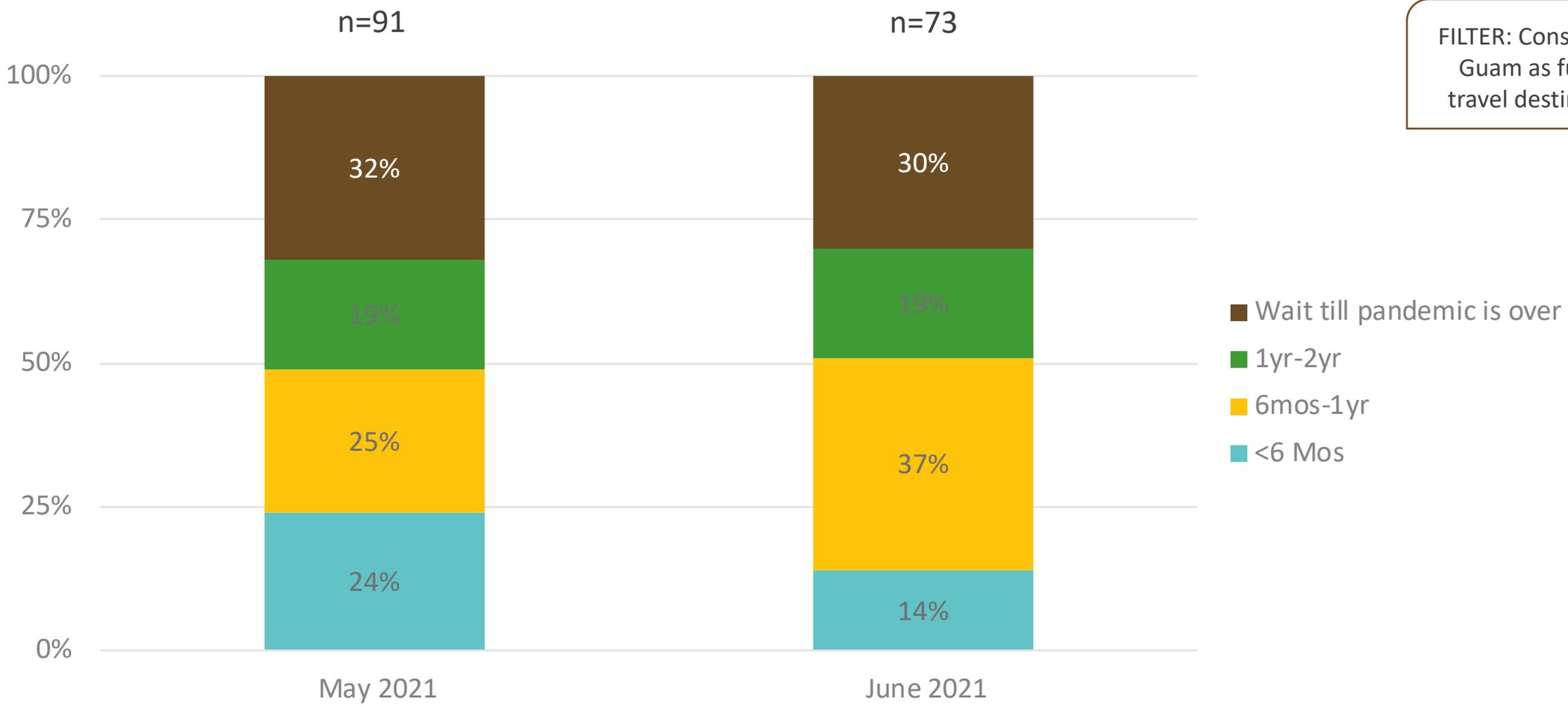
POTENTIAL FUTURE TRAVEL DESTINATIONS

– Tracking

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

The proportion of Korean visitors are considering Hawaii and Guam as potential travel destinations is down this reporting period.

TIMING OF FUTURE TRAVEL TO GUAM



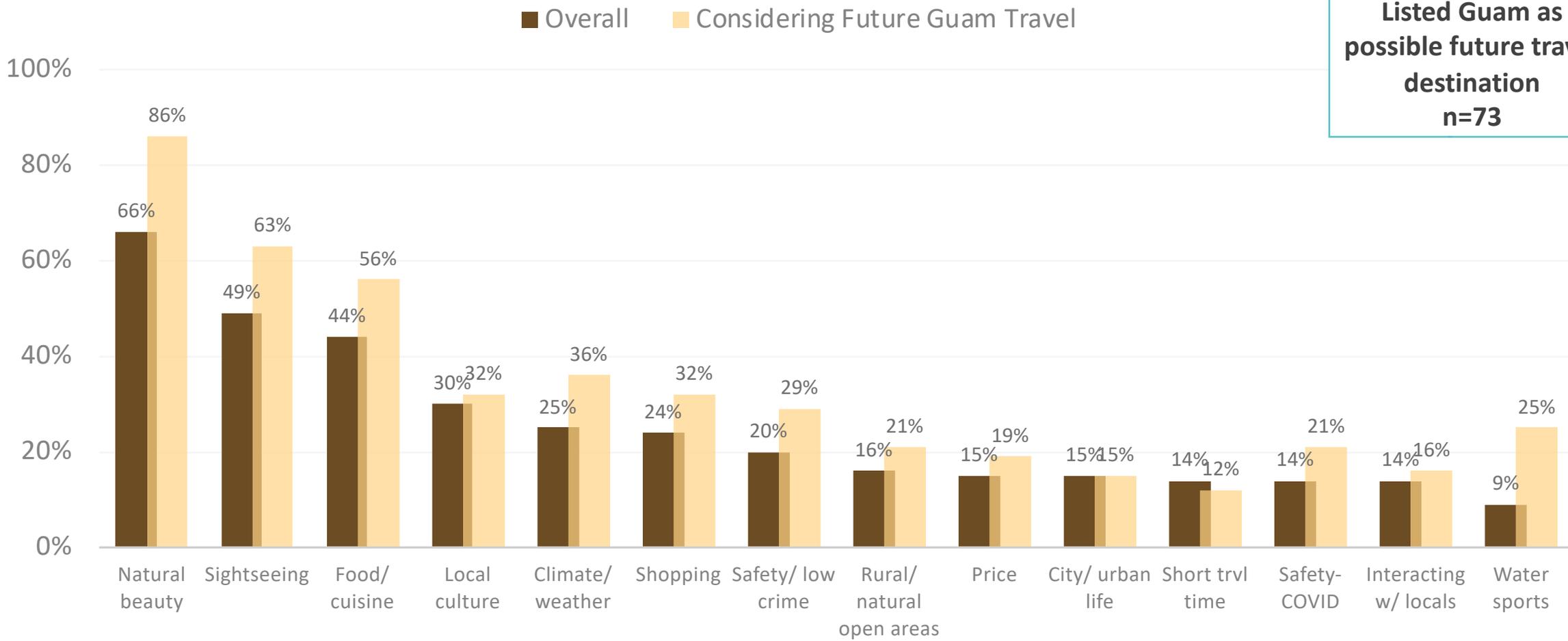
FILTER: Considering Guam as future travel destination

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



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

Filter:
Listed Guam as
possible future travel
destination
n=73



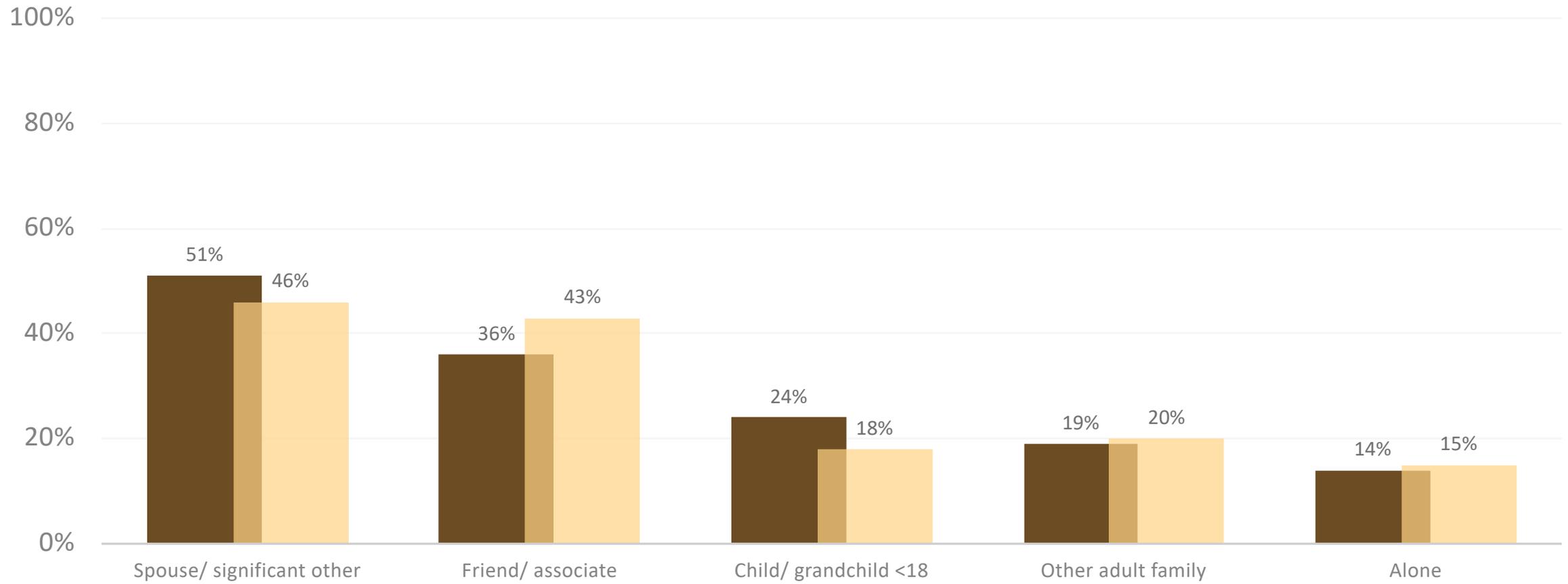
APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS – Tracking

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



FUTURE INTERNATIONAL TRAVEL PARTY

■ May 2021 ■ June 2021



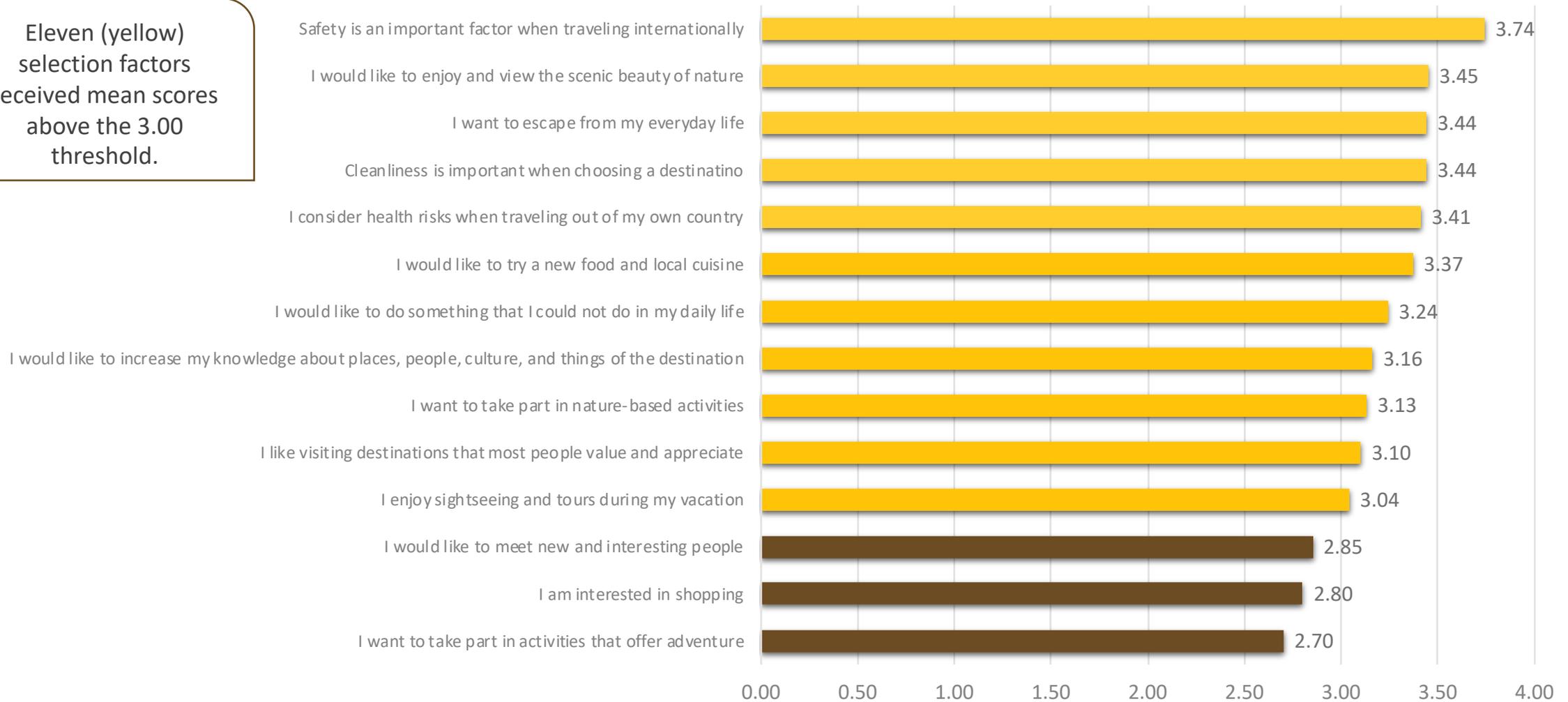
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

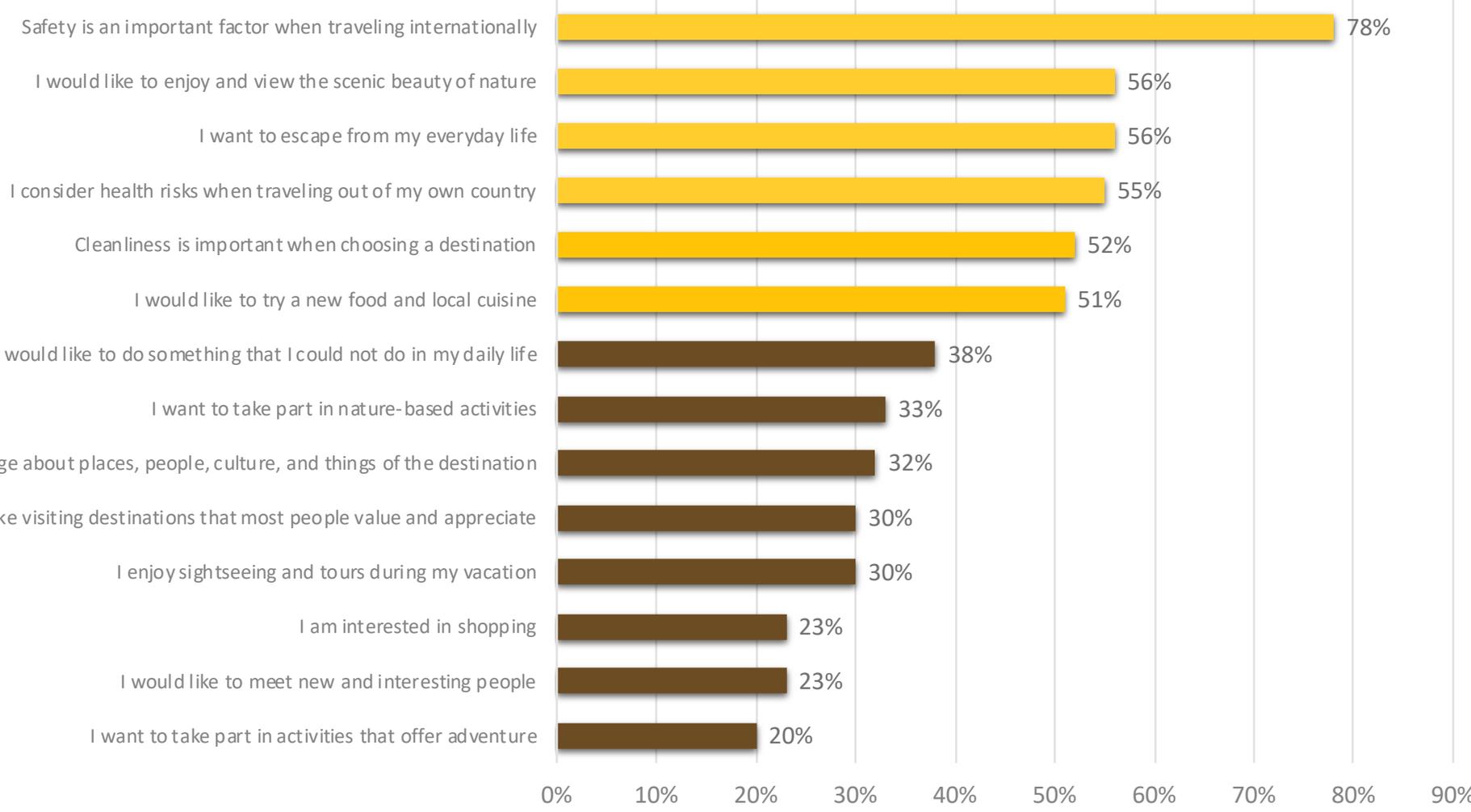
MEAN SCORE 4PT SCALE

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

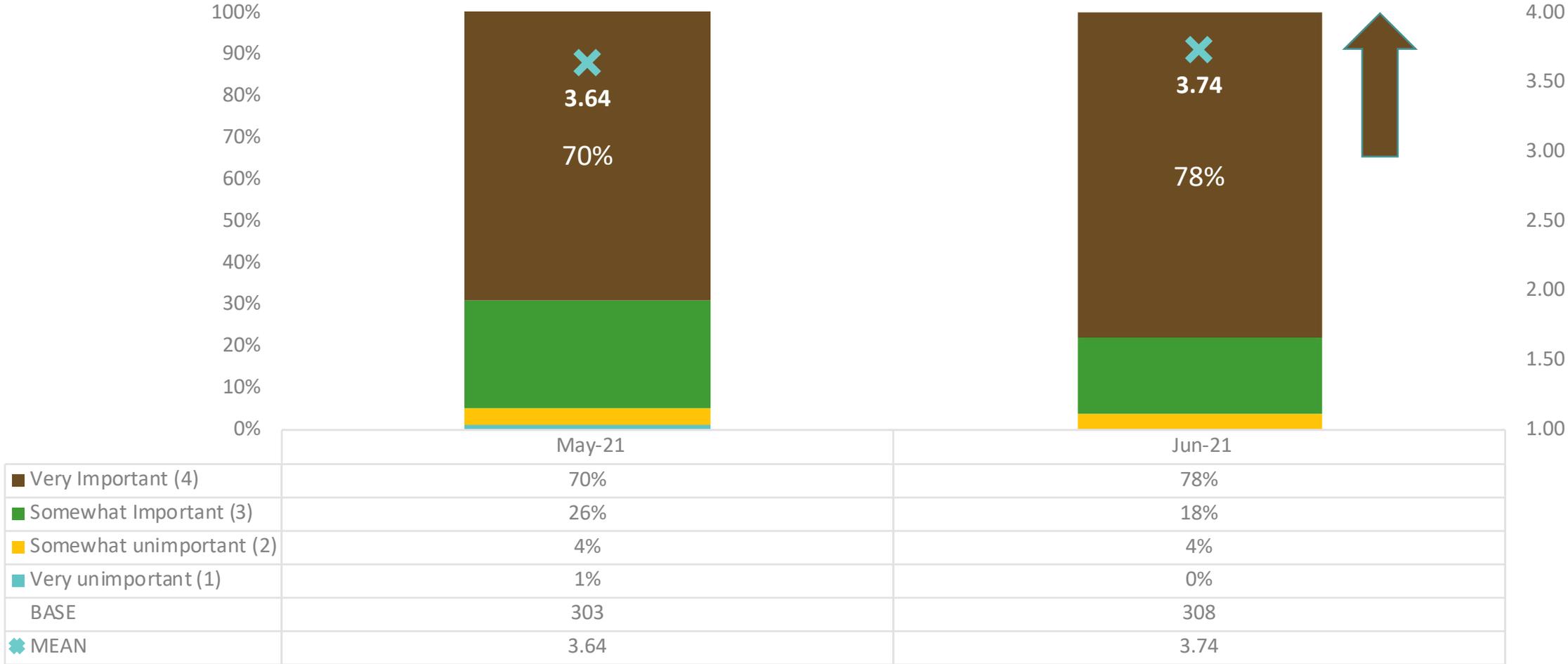


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

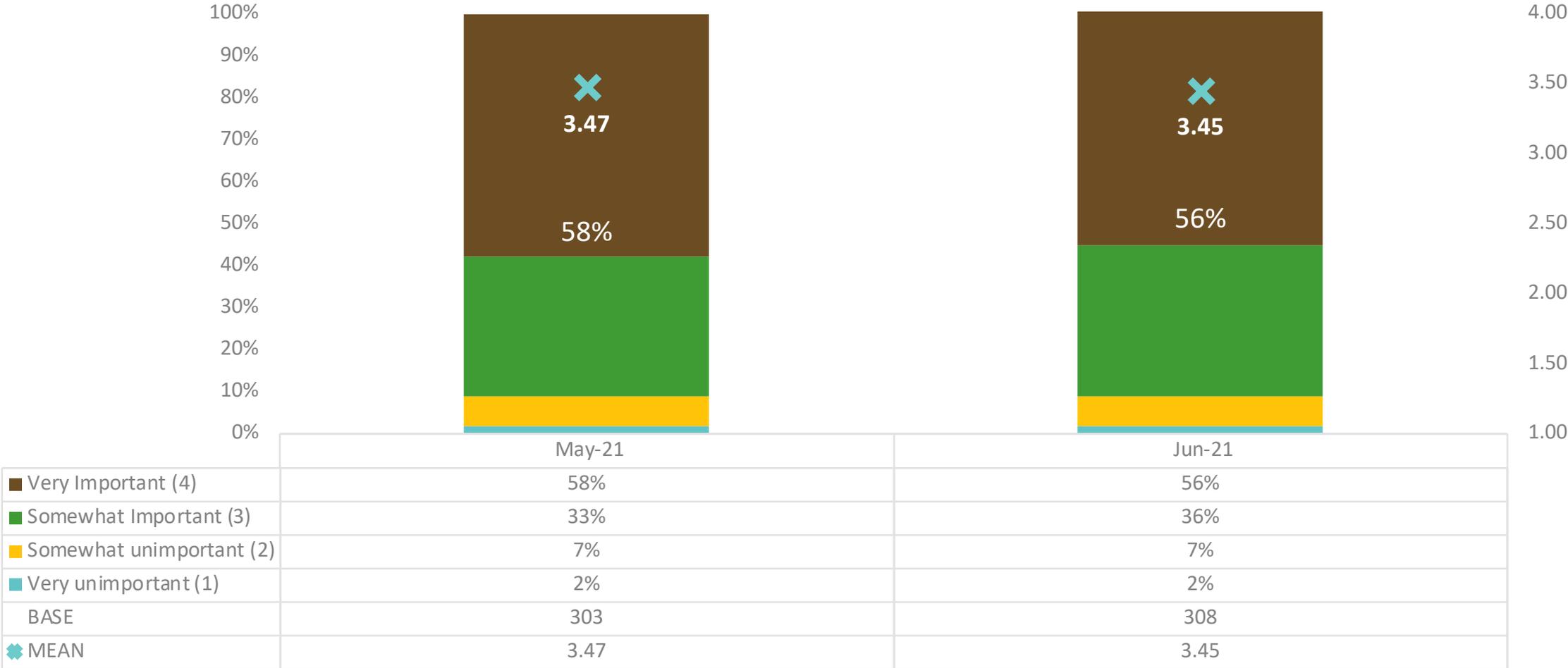
Six (yellow) selection factors received top box (very important) scores above 50%



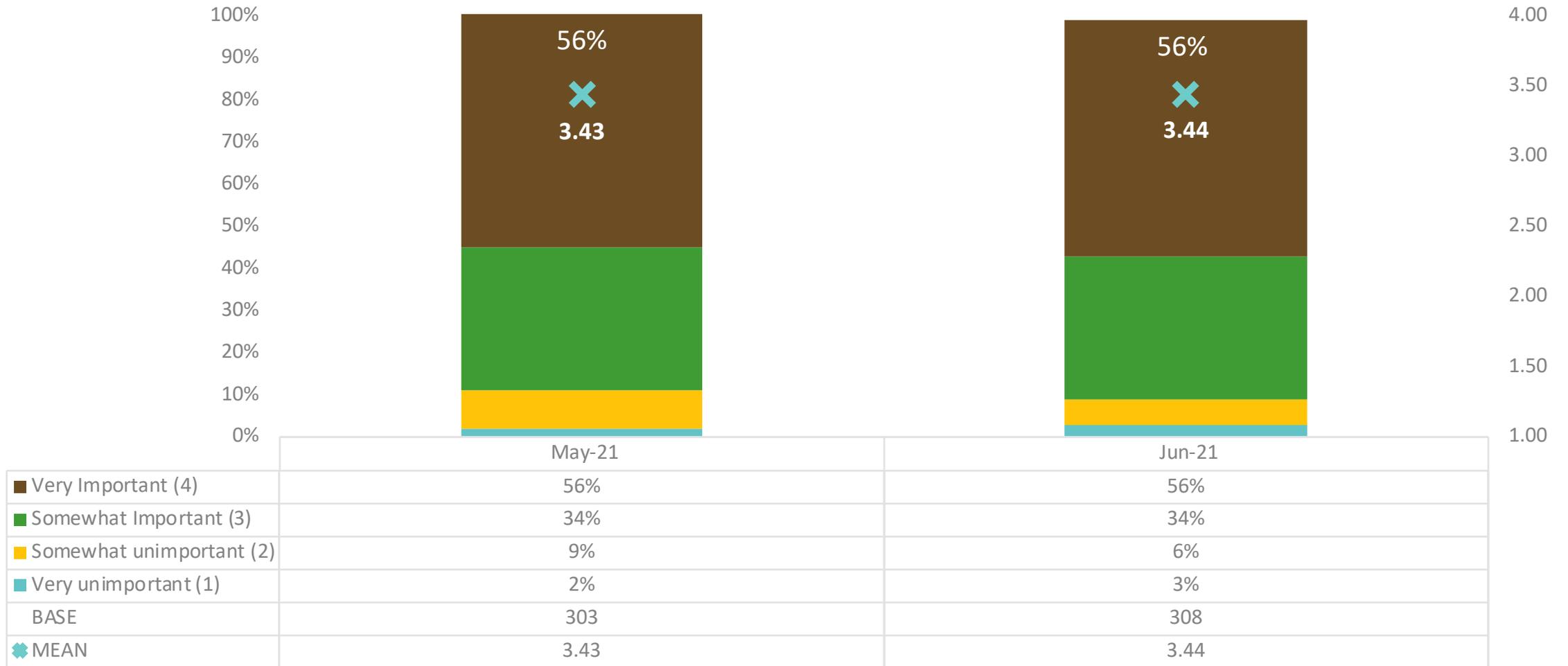
Safety is an important factor when traveling internationally



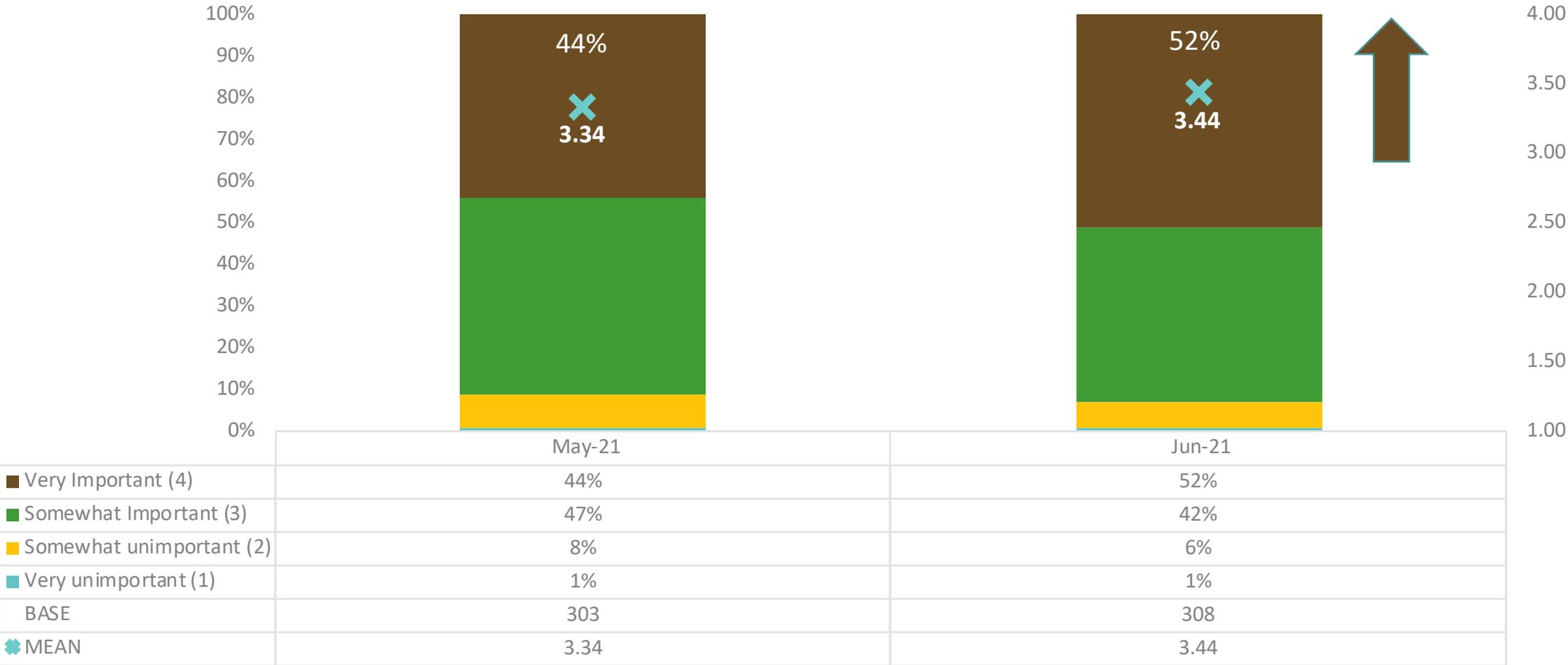
I would like to enjoy and view the scenic beauty of nature



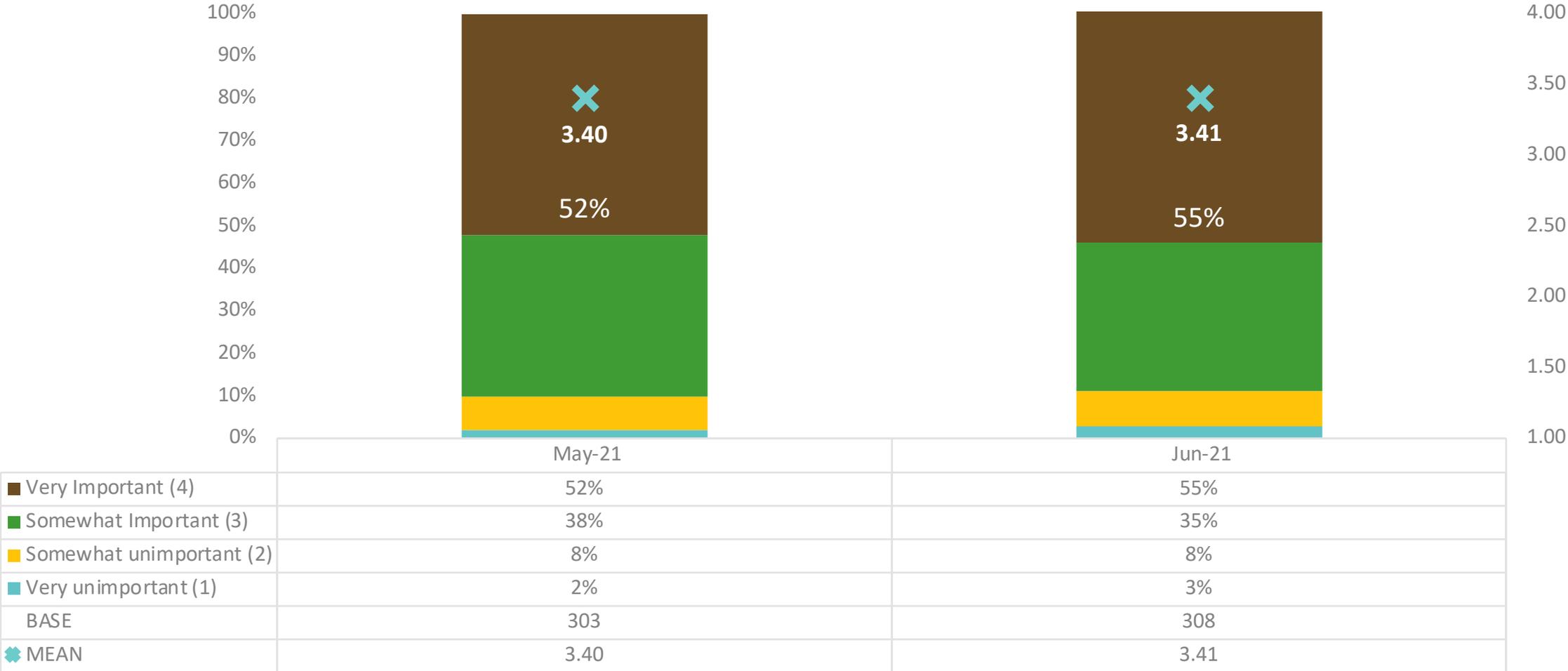
I want to escape my everyday life



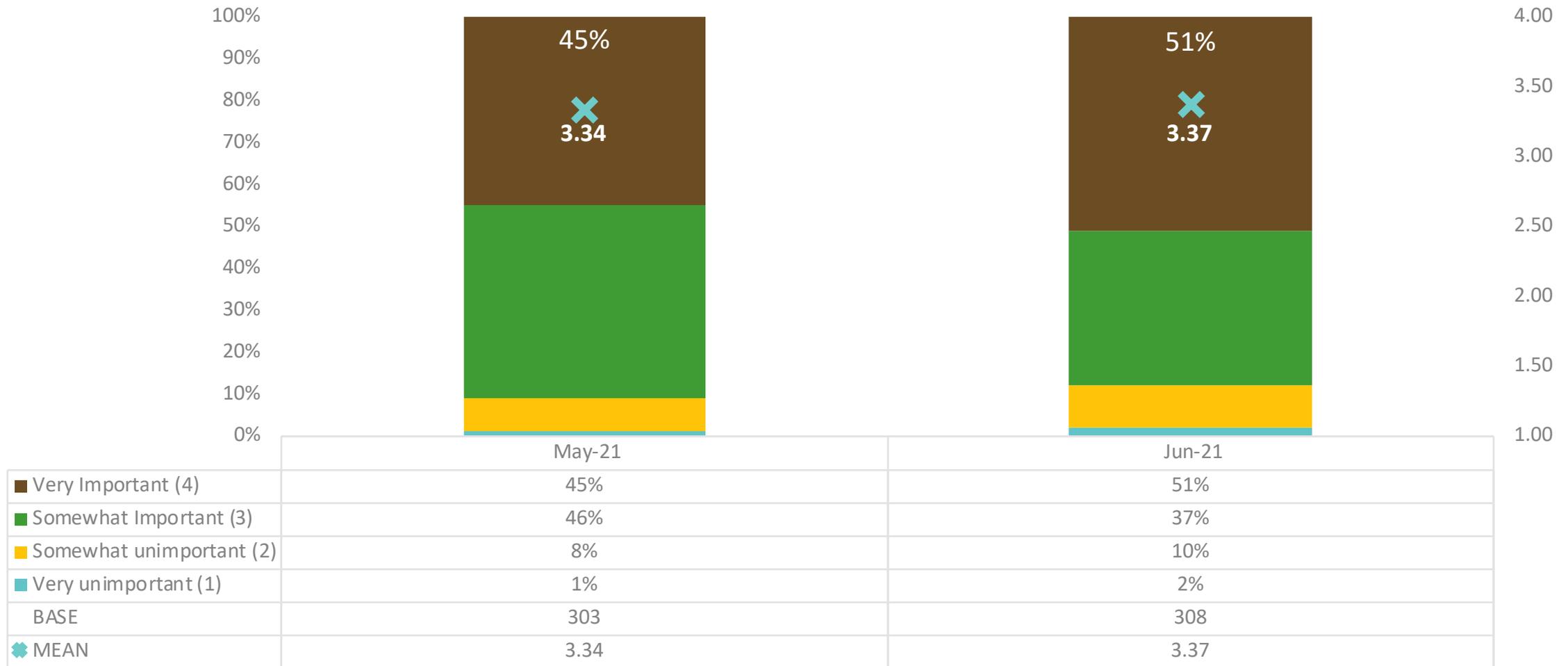
Cleanliness is important when choosing a destination



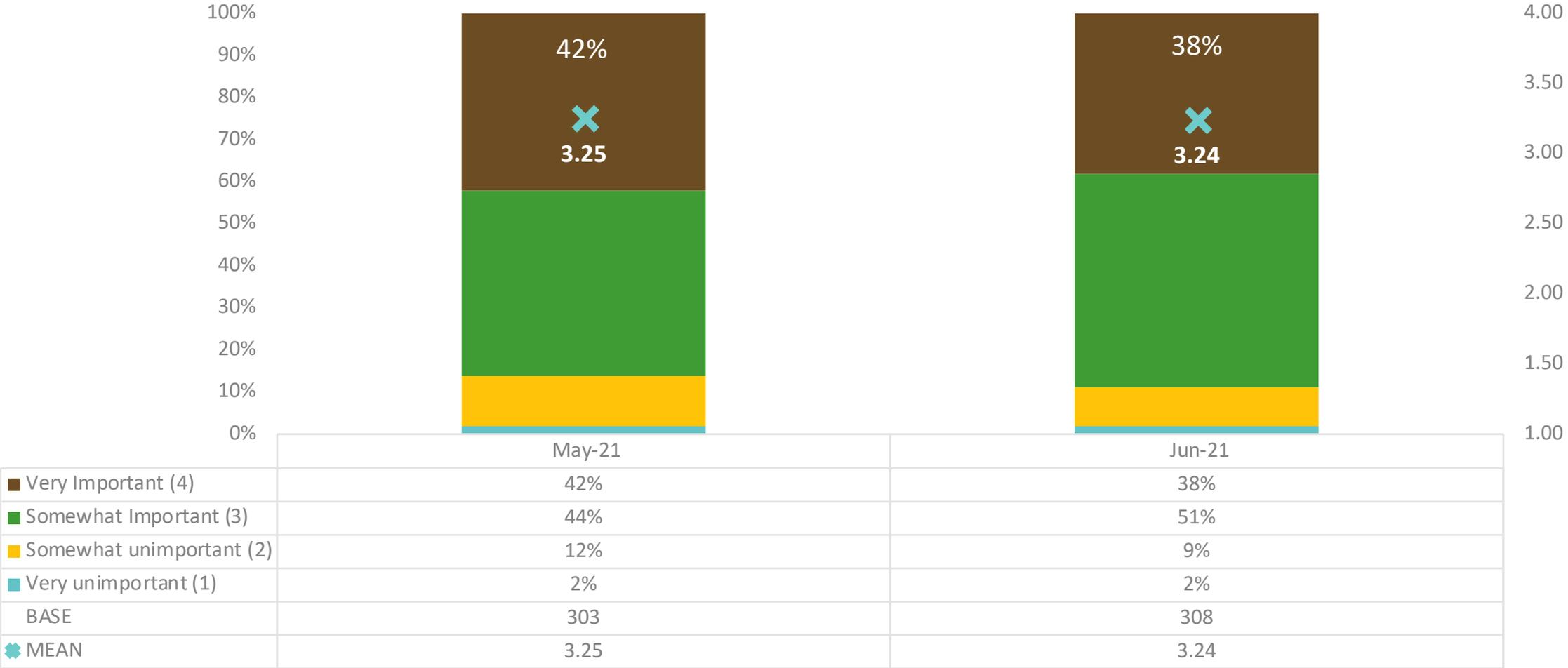
I consider health risks when traveling out of my own country



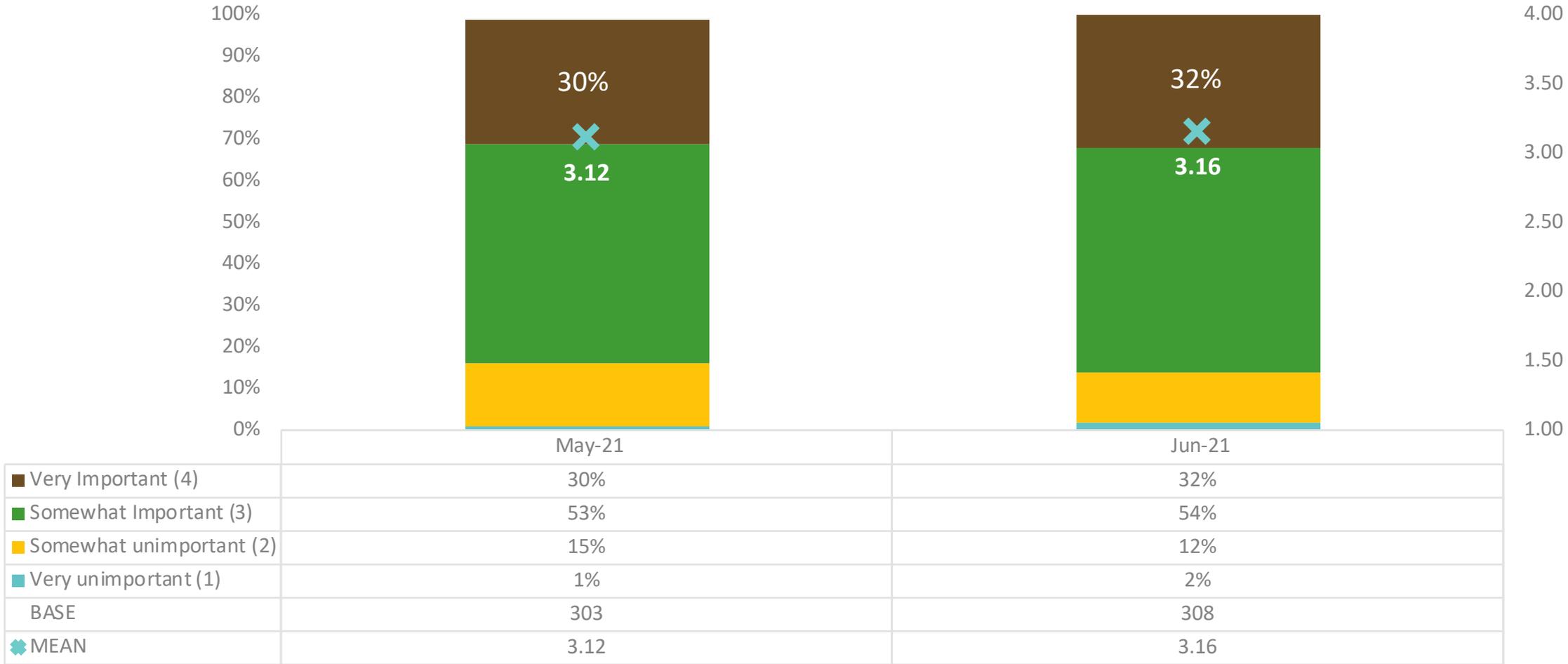
I would like to try a new food and local cuisine



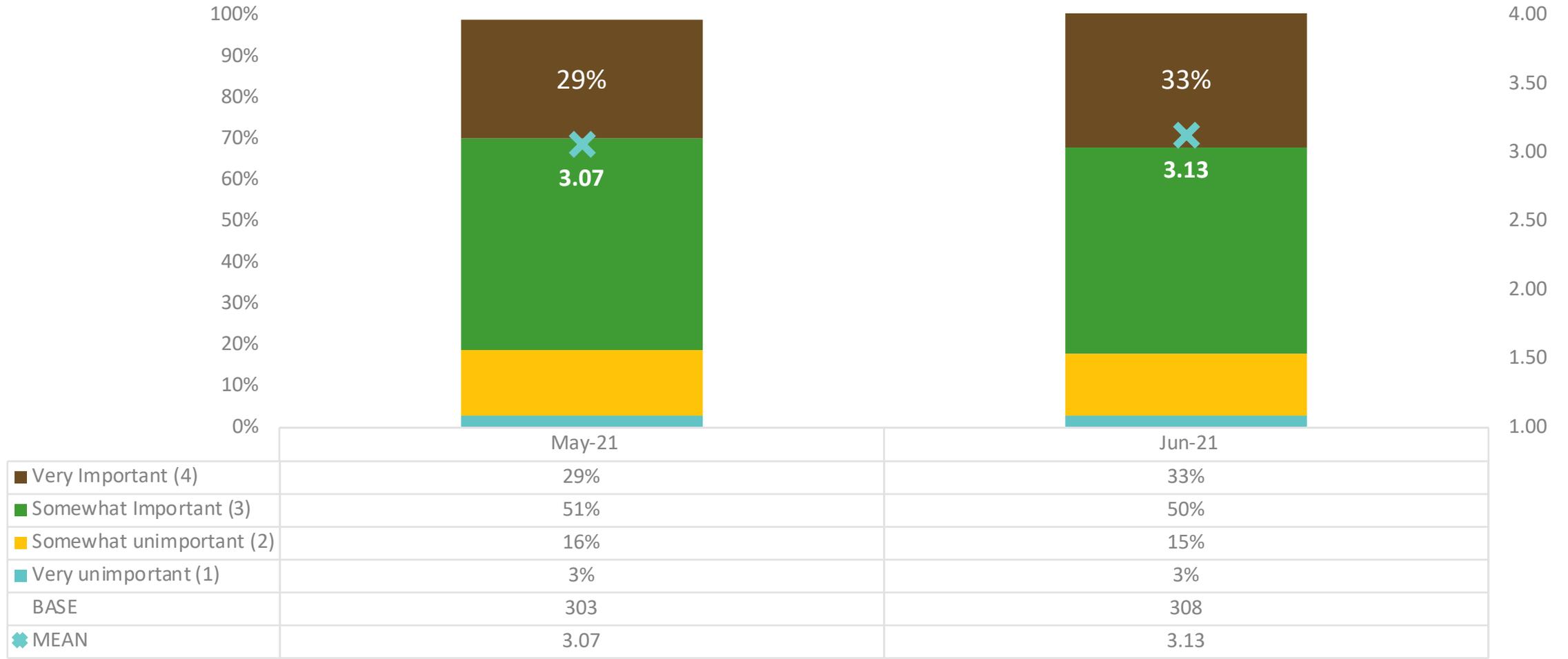
I would like to do something that I could not do in my daily life



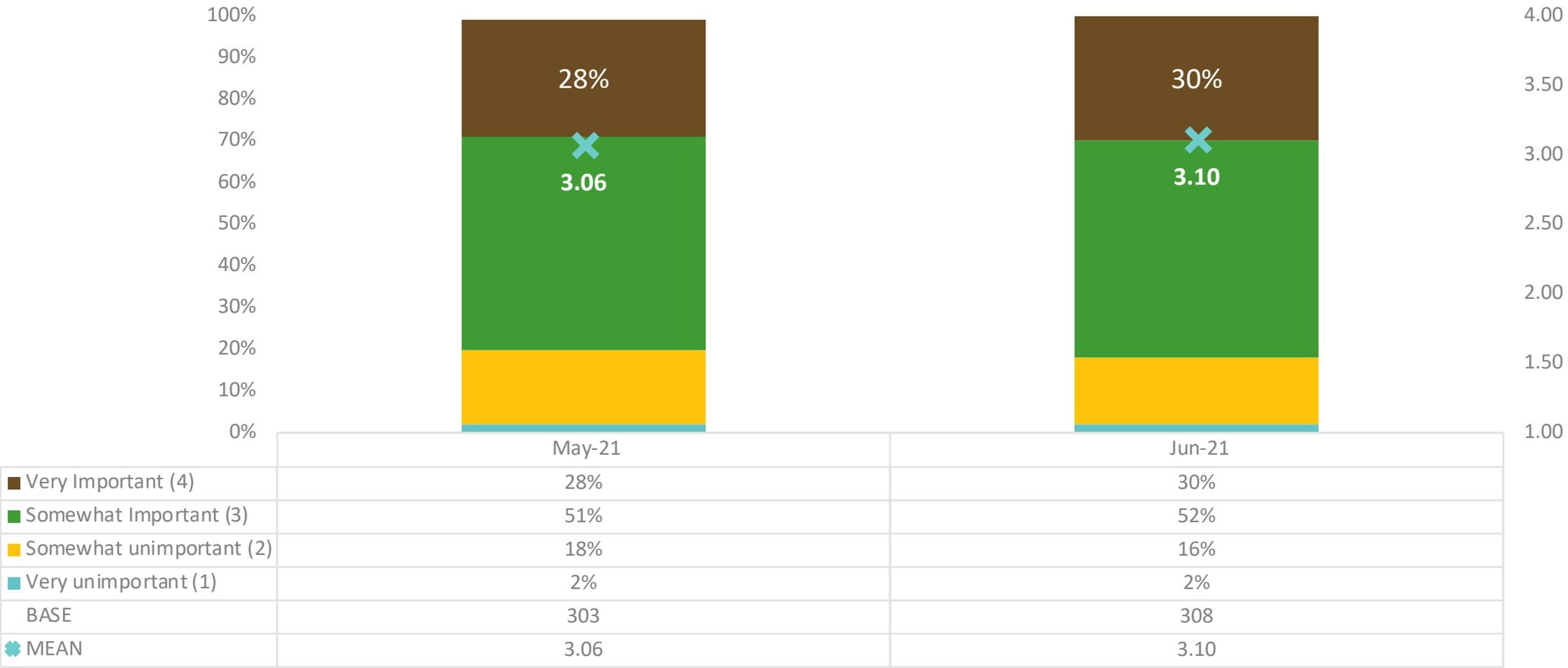
I would like to increase my knowledge about places, people, culture, and things of the destination



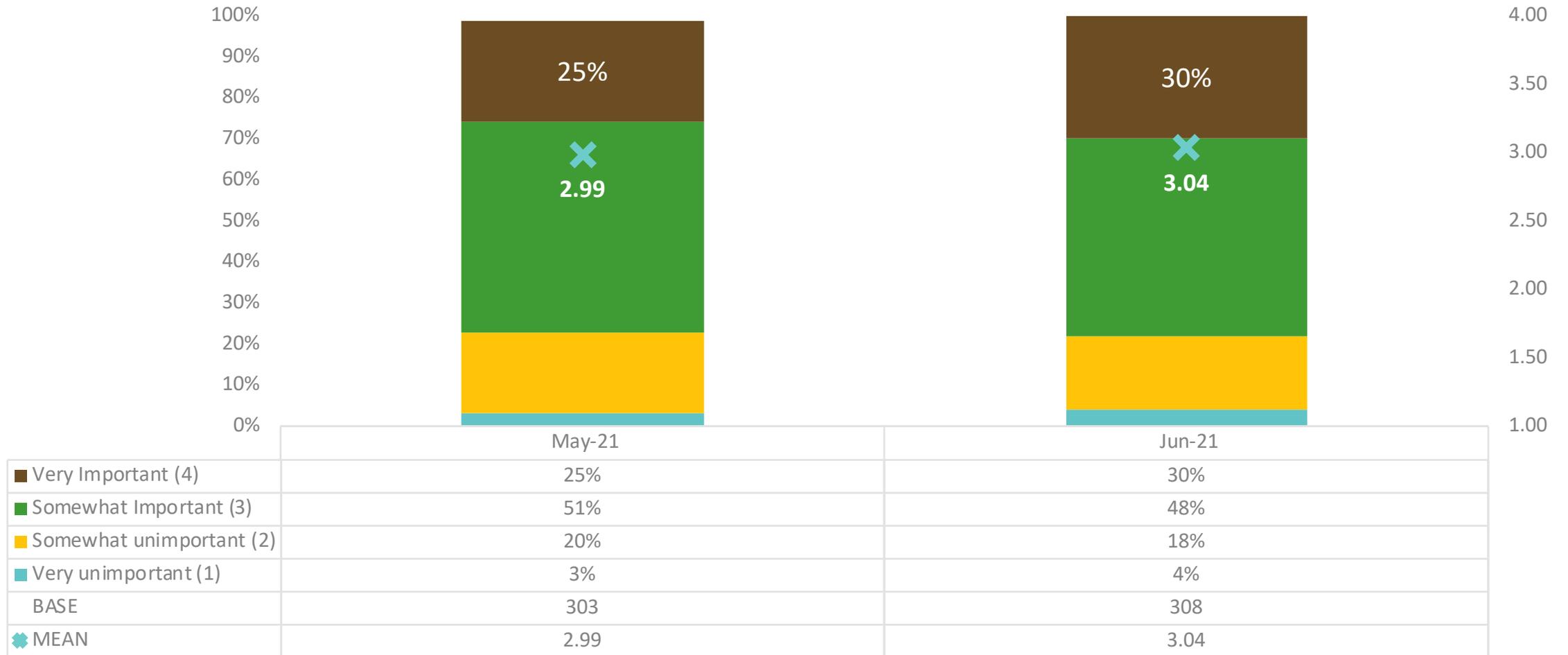
I want to take part in nature-based activities



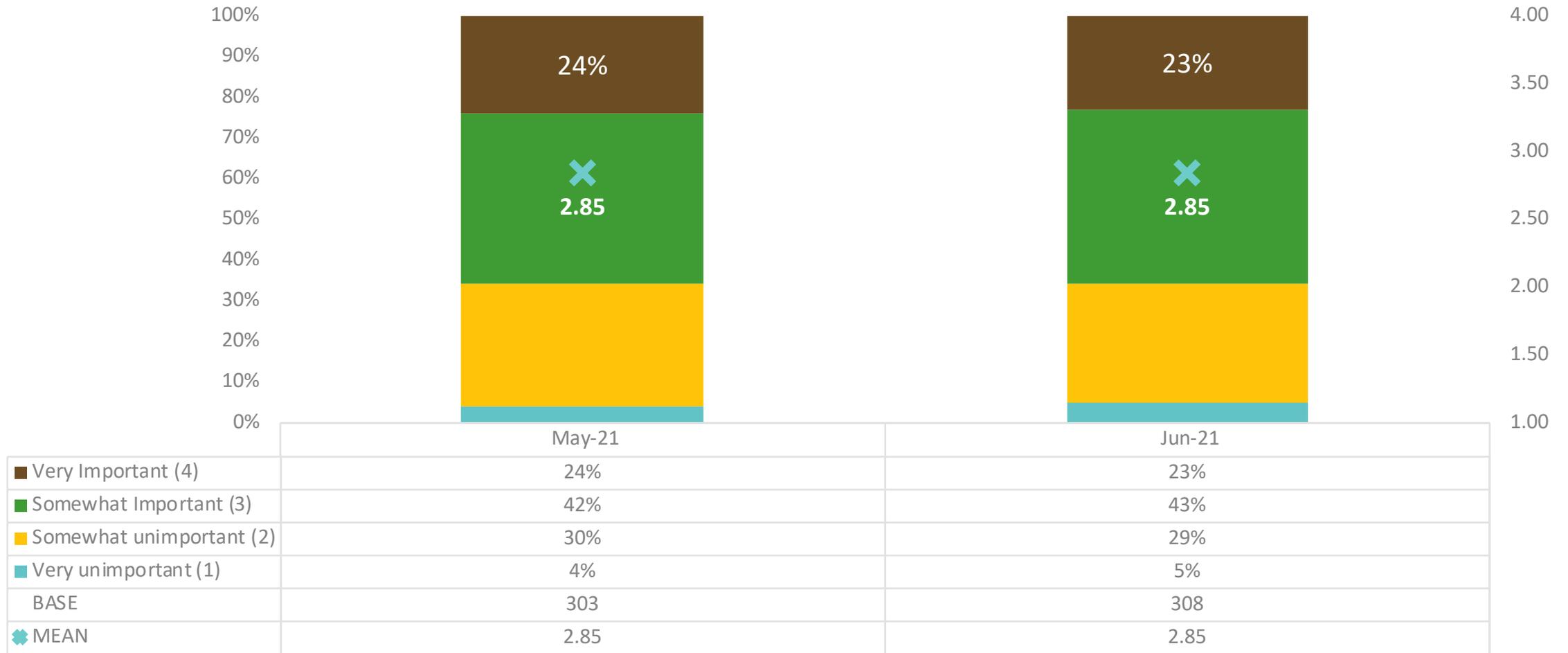
I like visiting destinations that most people value and appreciate



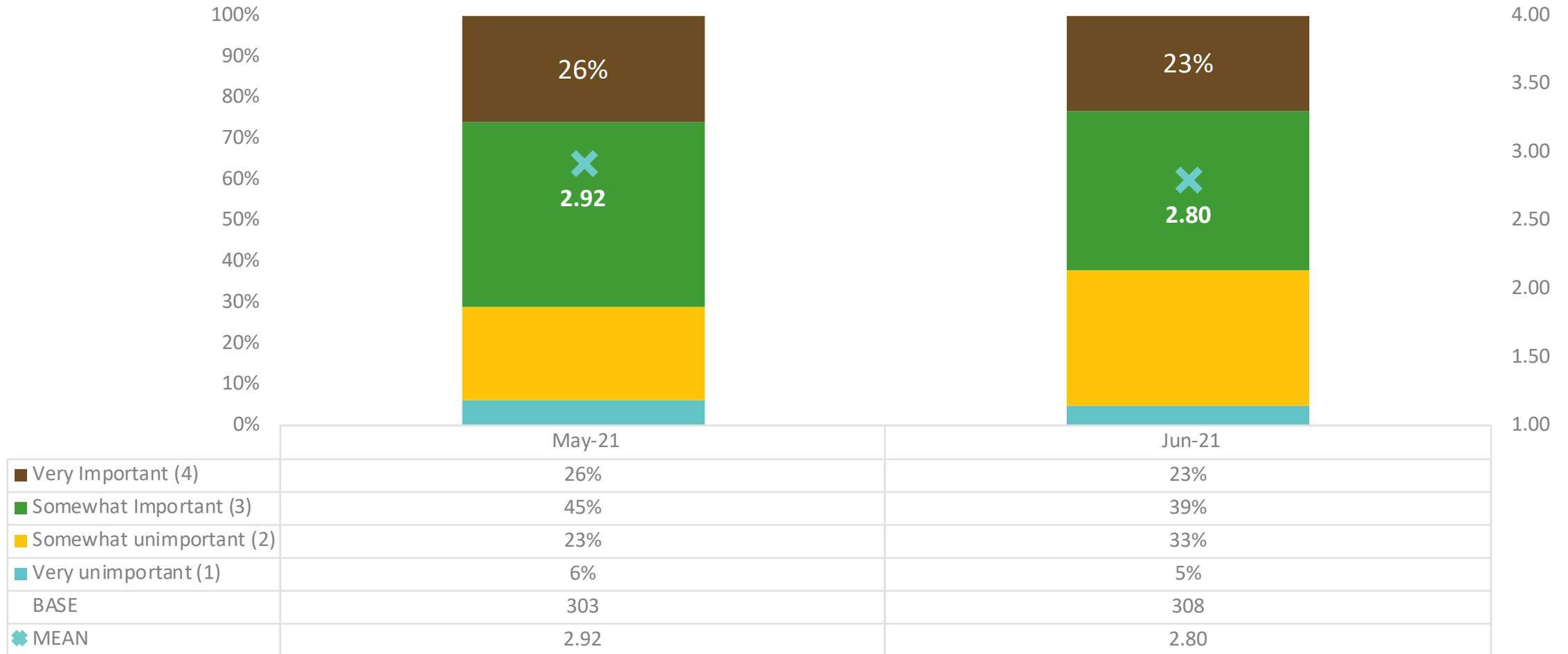
I enjoy sightseeing and tours during my vacation



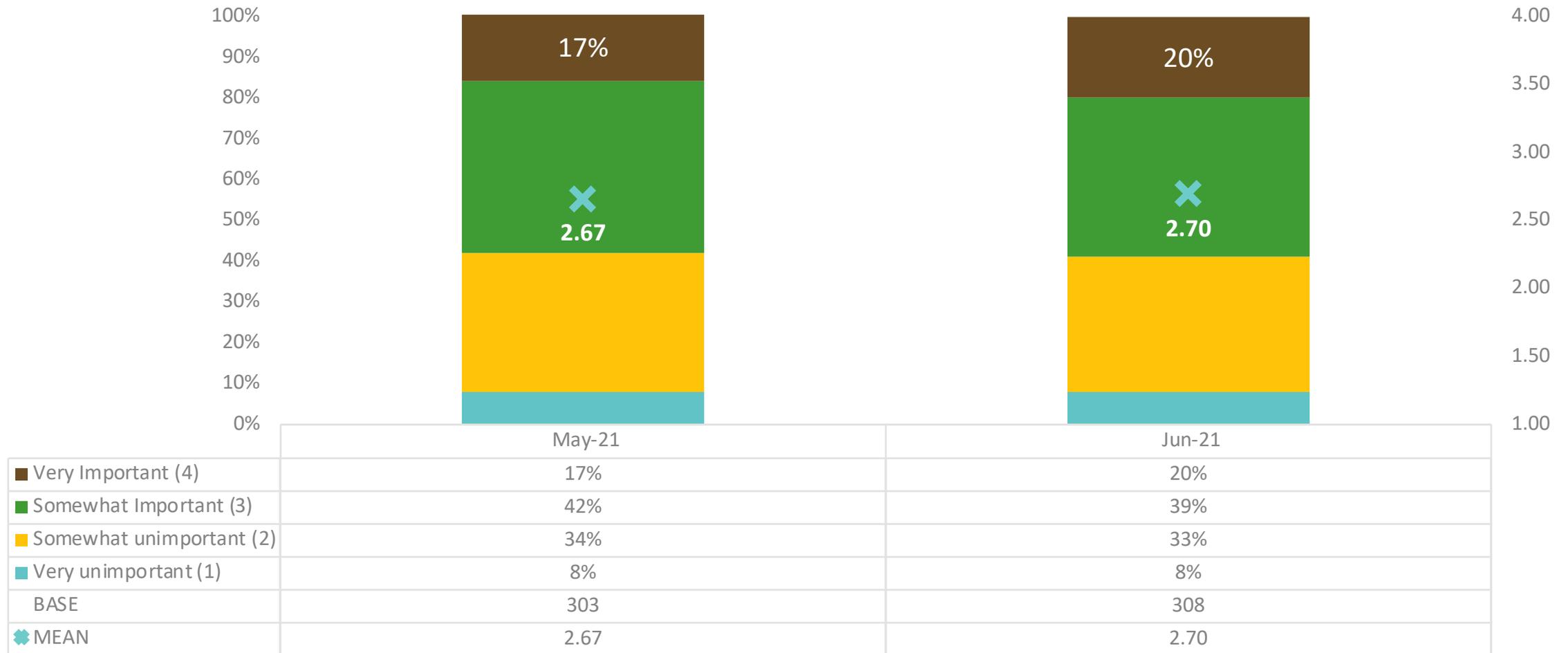
I would like to meet new and interesting people



I am interested in shopping



I want to take part in activities that offer adventure

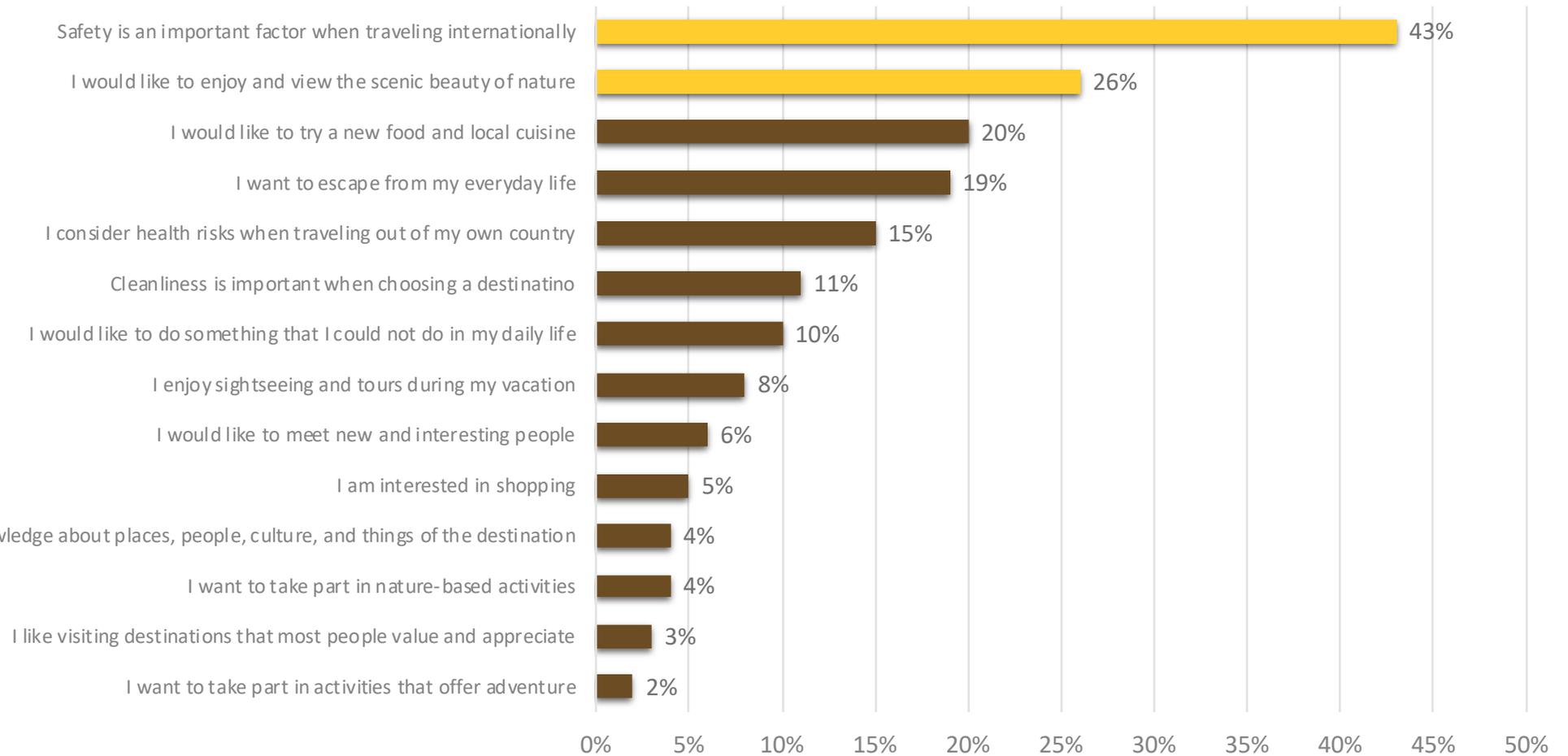


DESTINATION SELECTION FACTORS – TOP TWO

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

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

Base
n=293



DESTINATION SELECTION FACTORS – TOP TWO

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





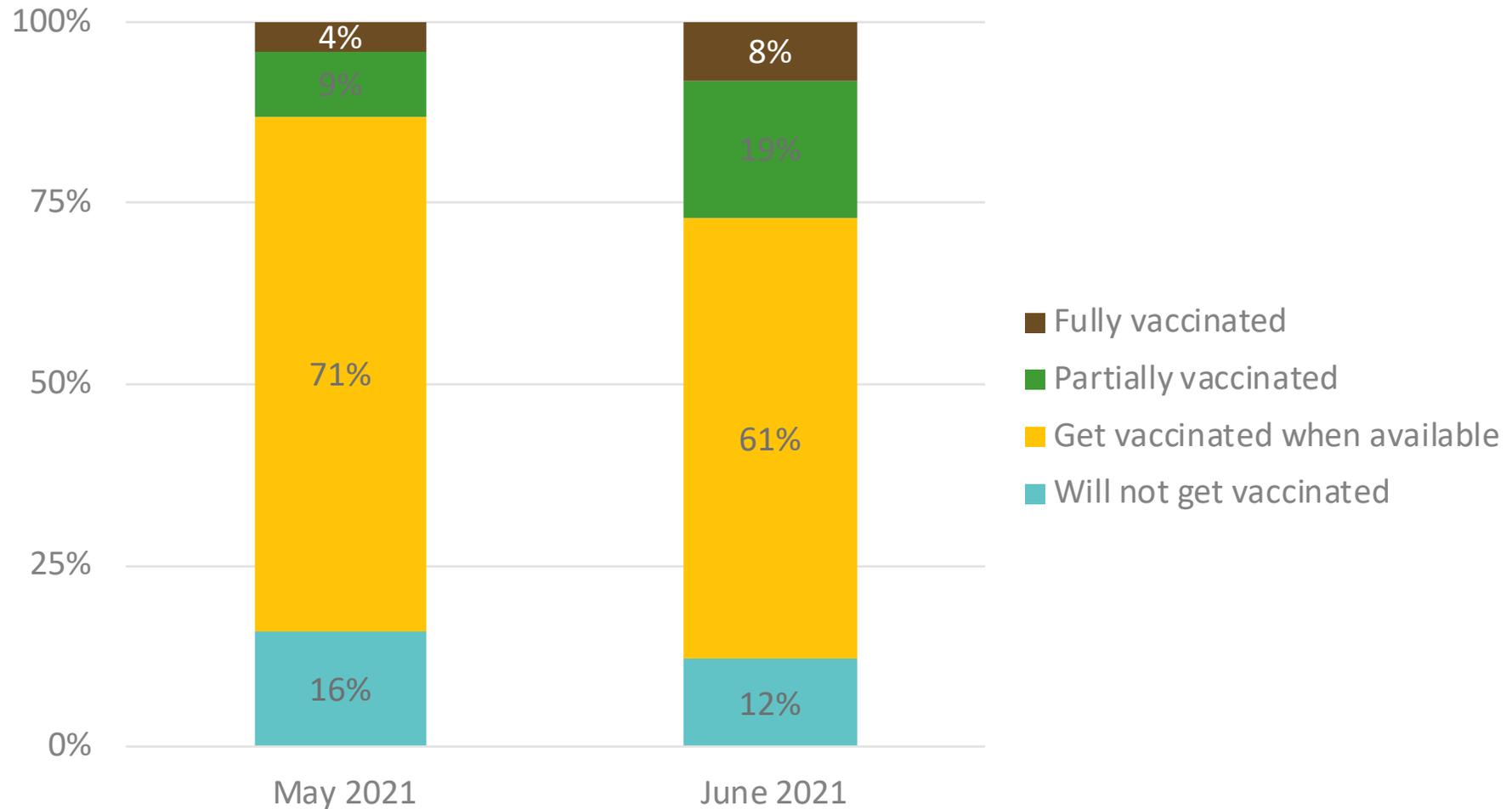
SECTION 2

COVID-19



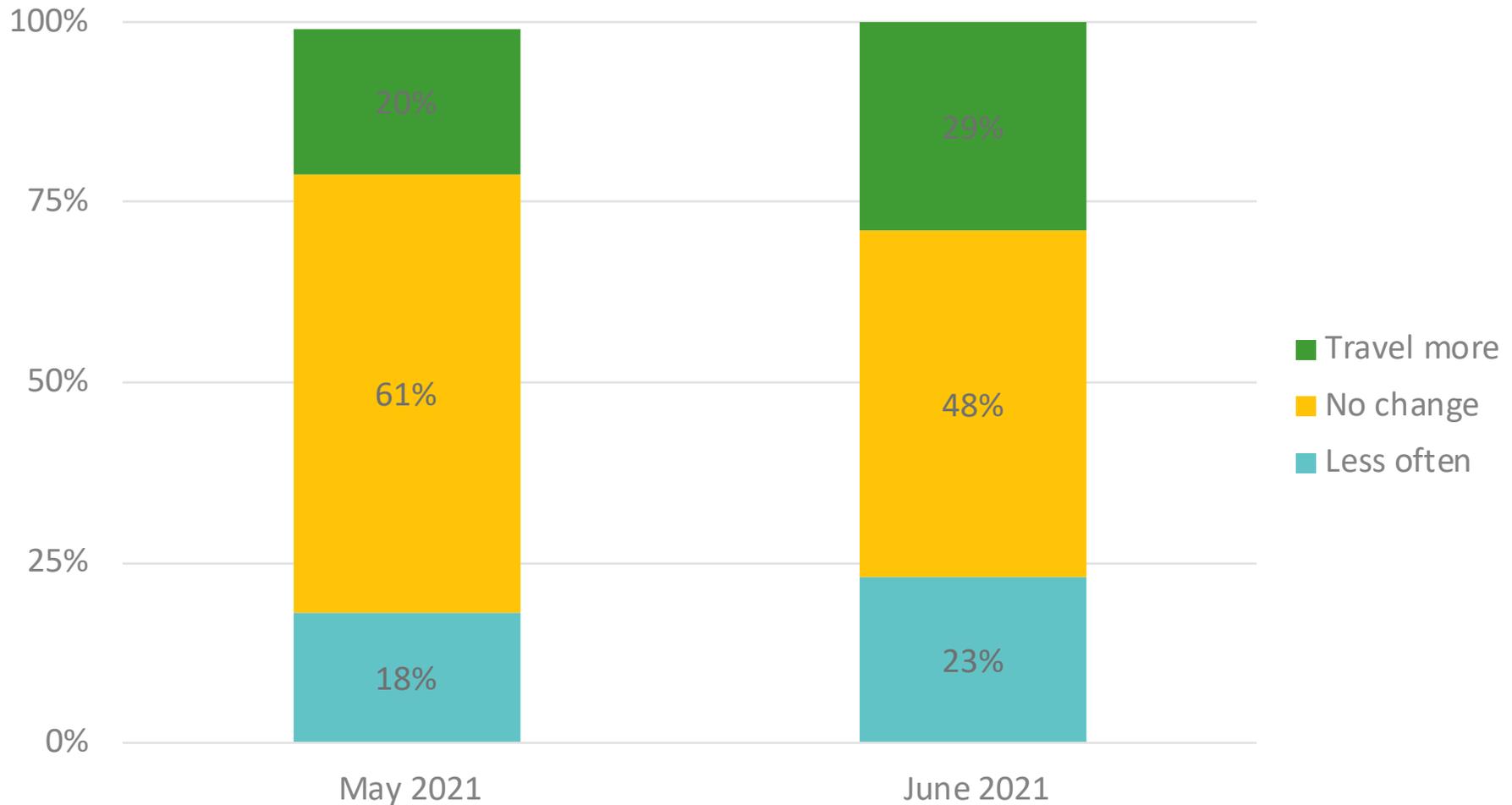
COVID-19 VACCINE STATUS

The proportion of respondents who are vaccinated is increasing, though the proportions are still relatively small.



POST-COVID TRAVEL

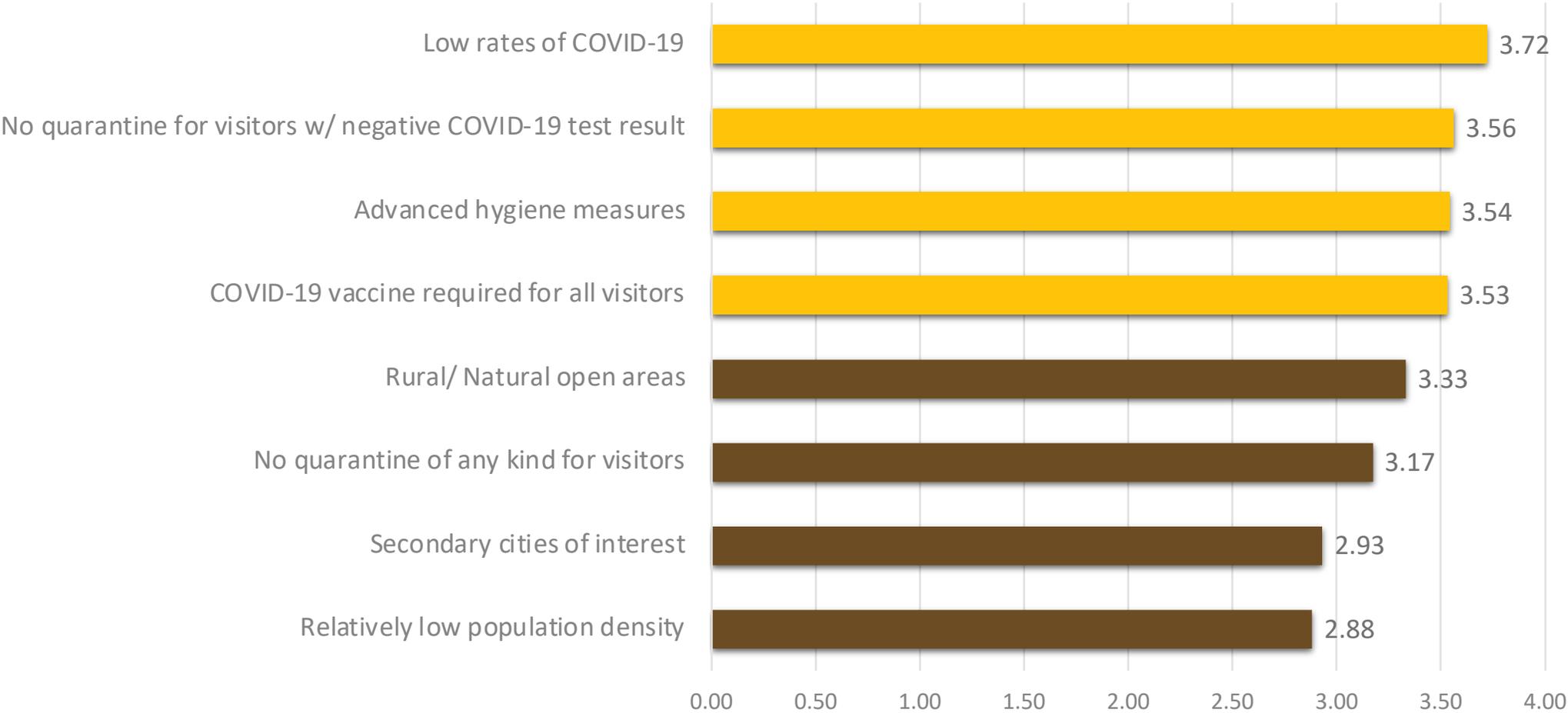
The proportion of Korean visitors who say they intend to travel more frequently post-COVID has increased.



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

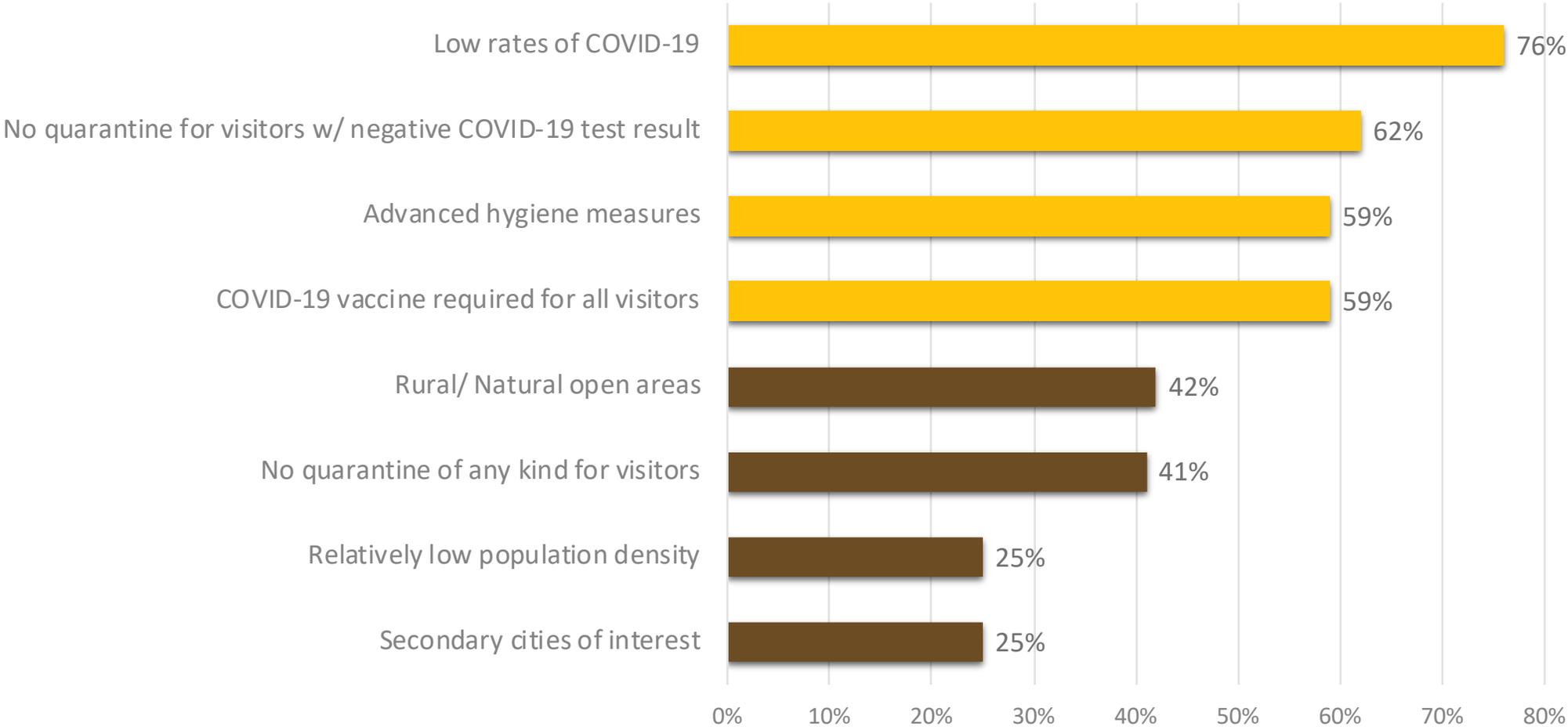
Four (yellow) selection factors received mean scores above the 3.50 threshold.



POST-COVID TRAVEL – IMPORTANCE

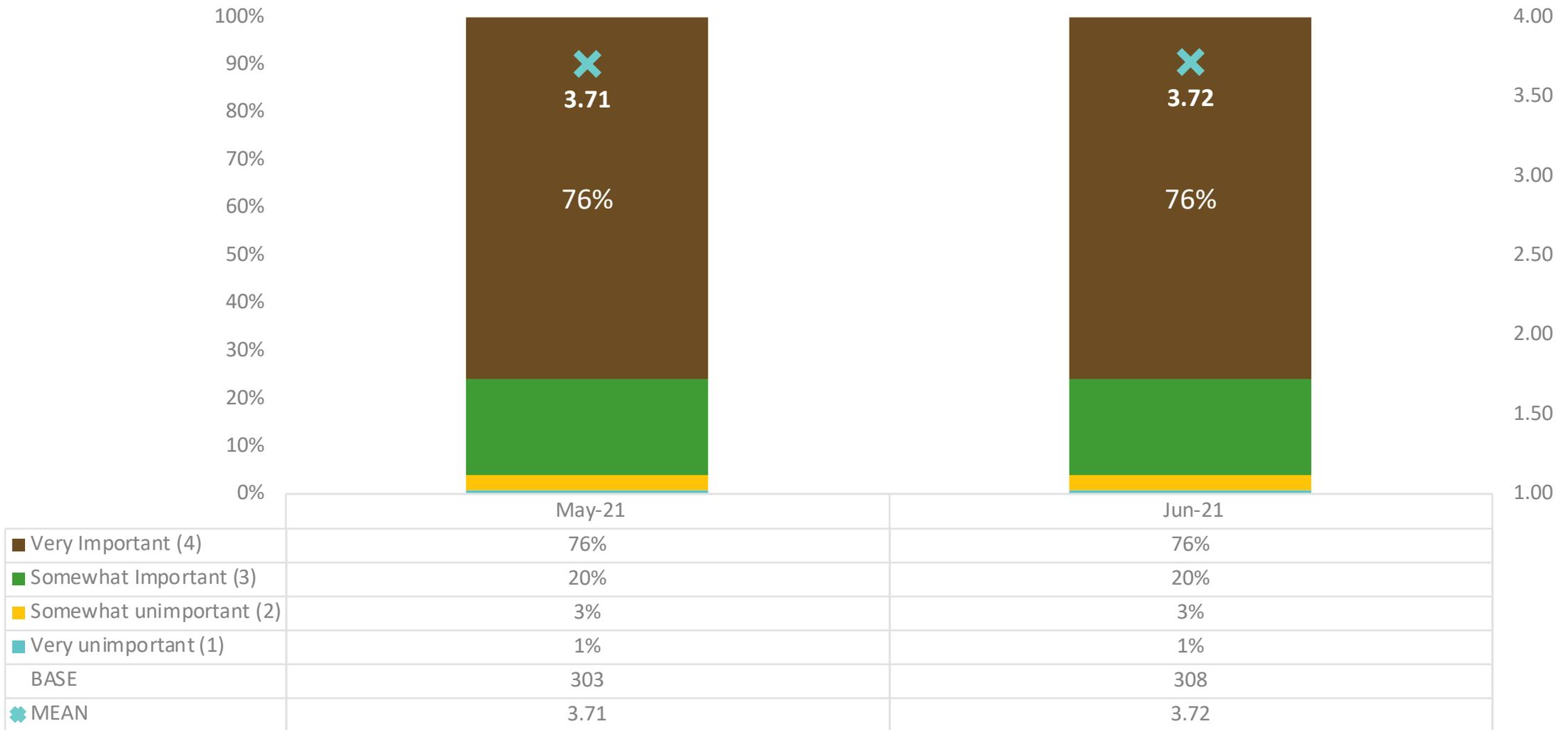
4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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



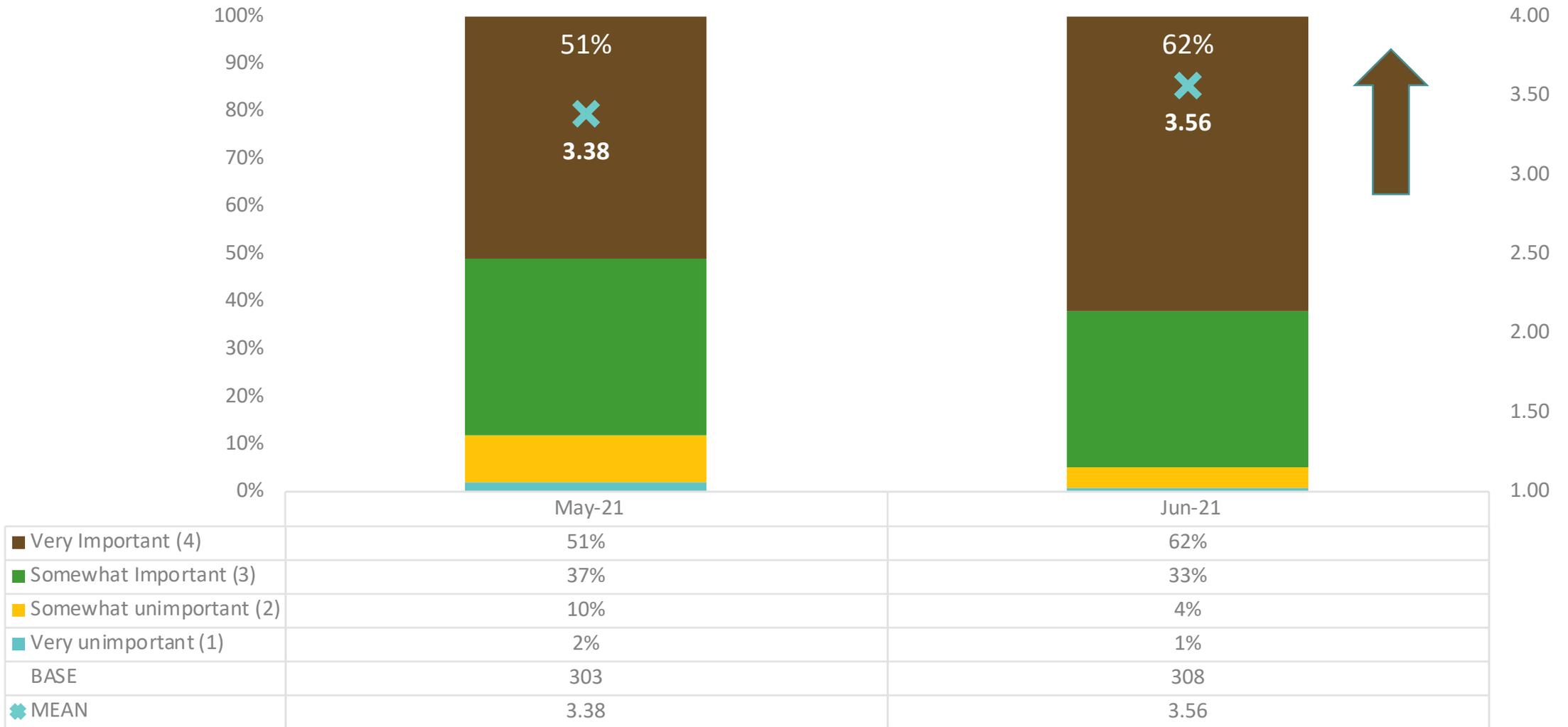
POST-COVID SELECTION FACTOR

Low rates of COVID-19



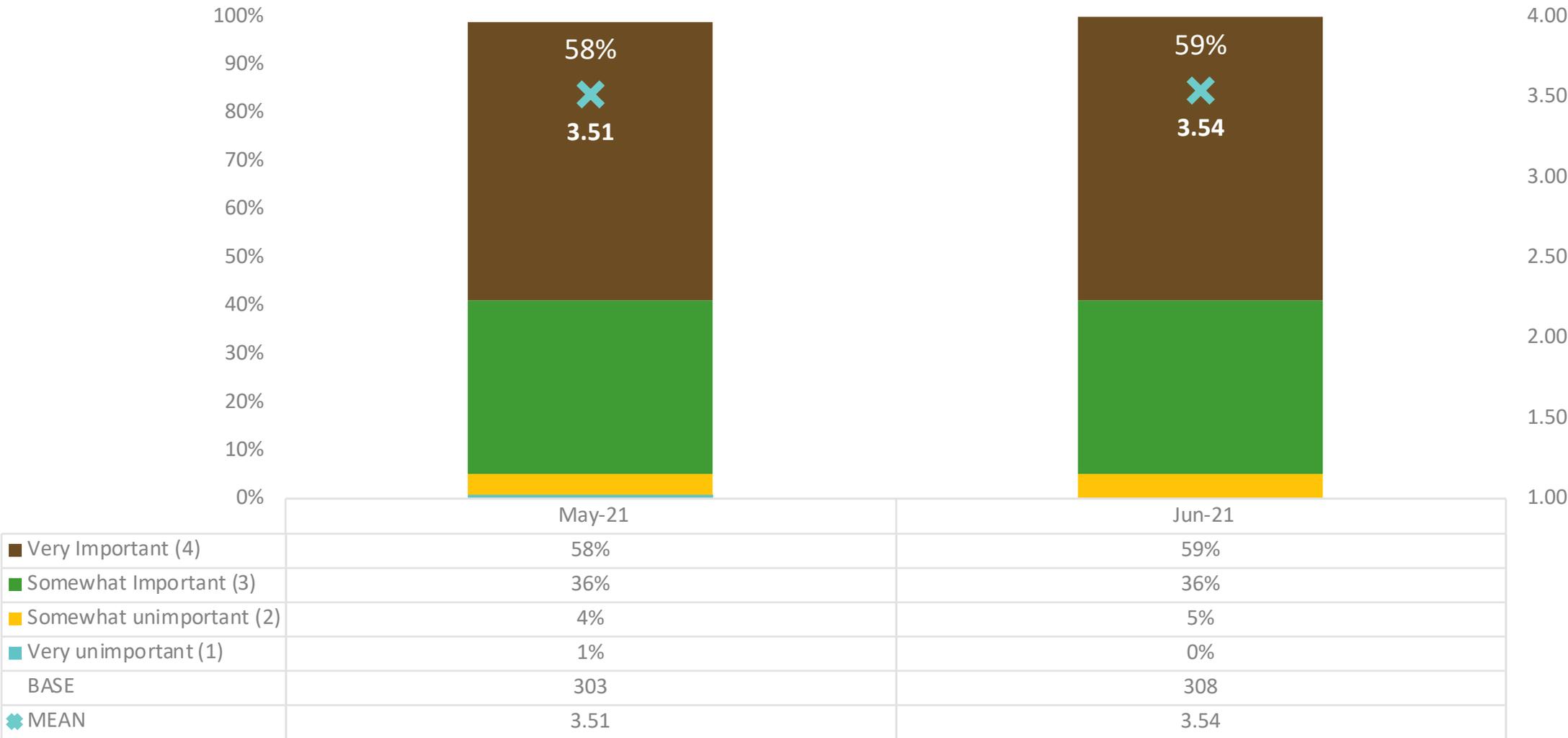
POST-COVID SELECTION FACTOR

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



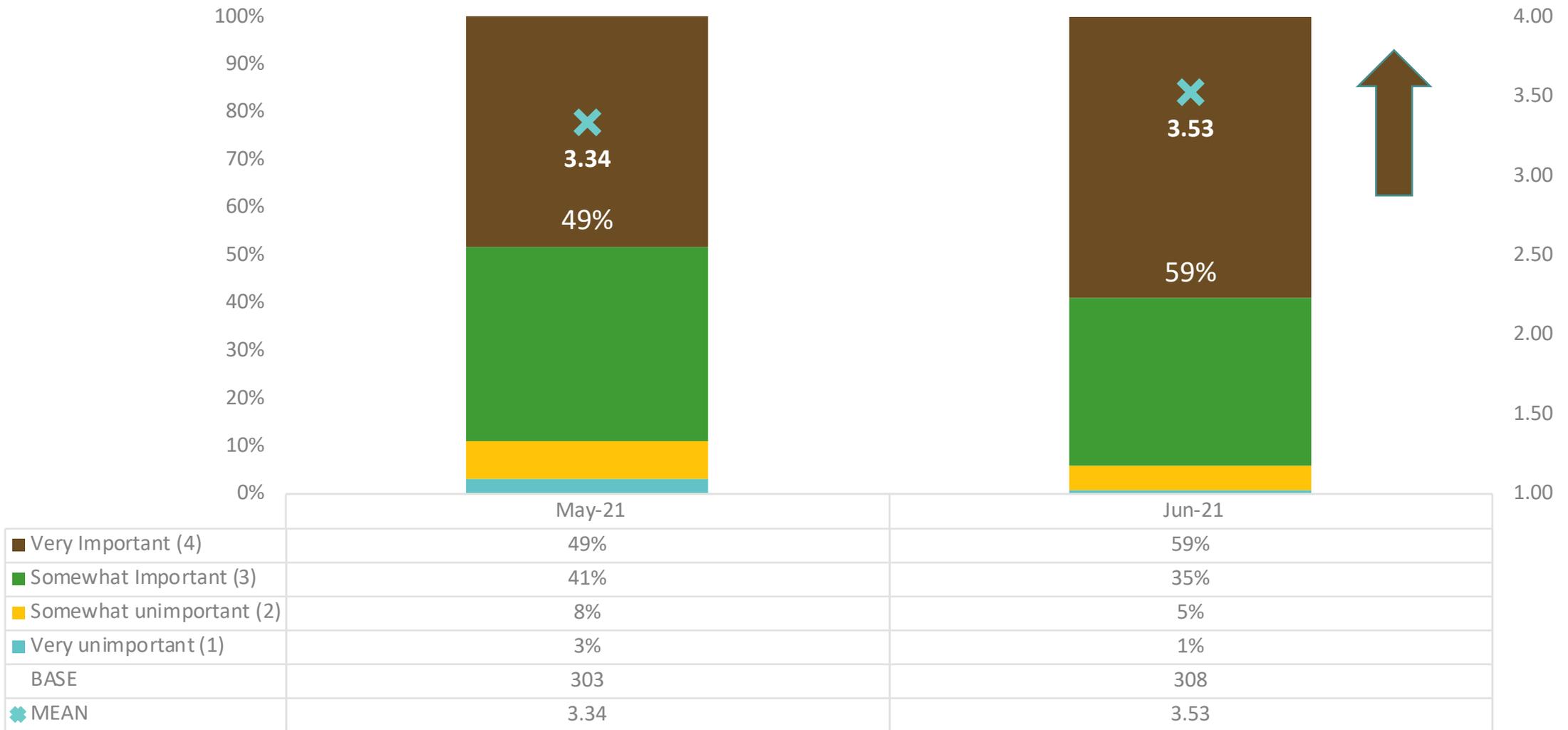
POST-COVID SELECTION FACTOR

Advanced hygiene measures



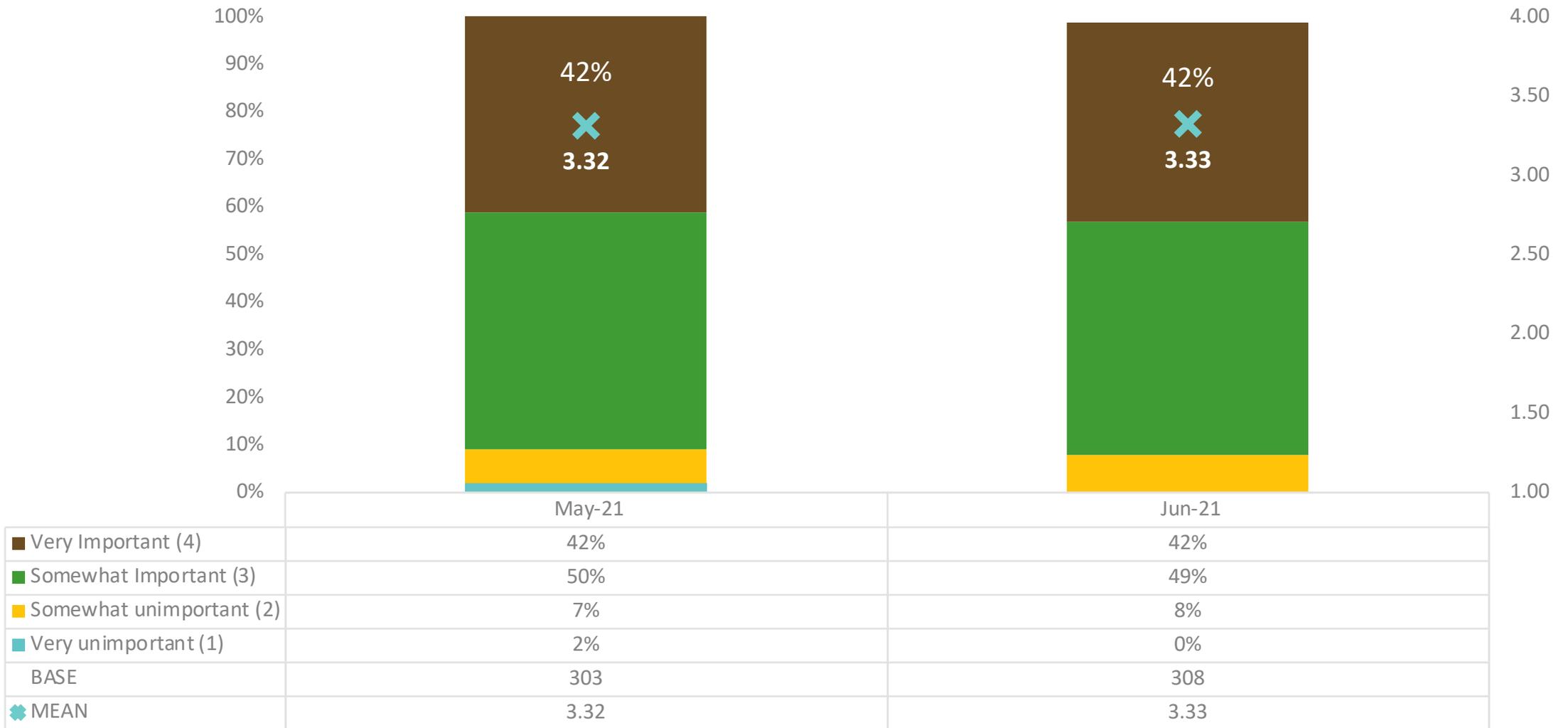
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



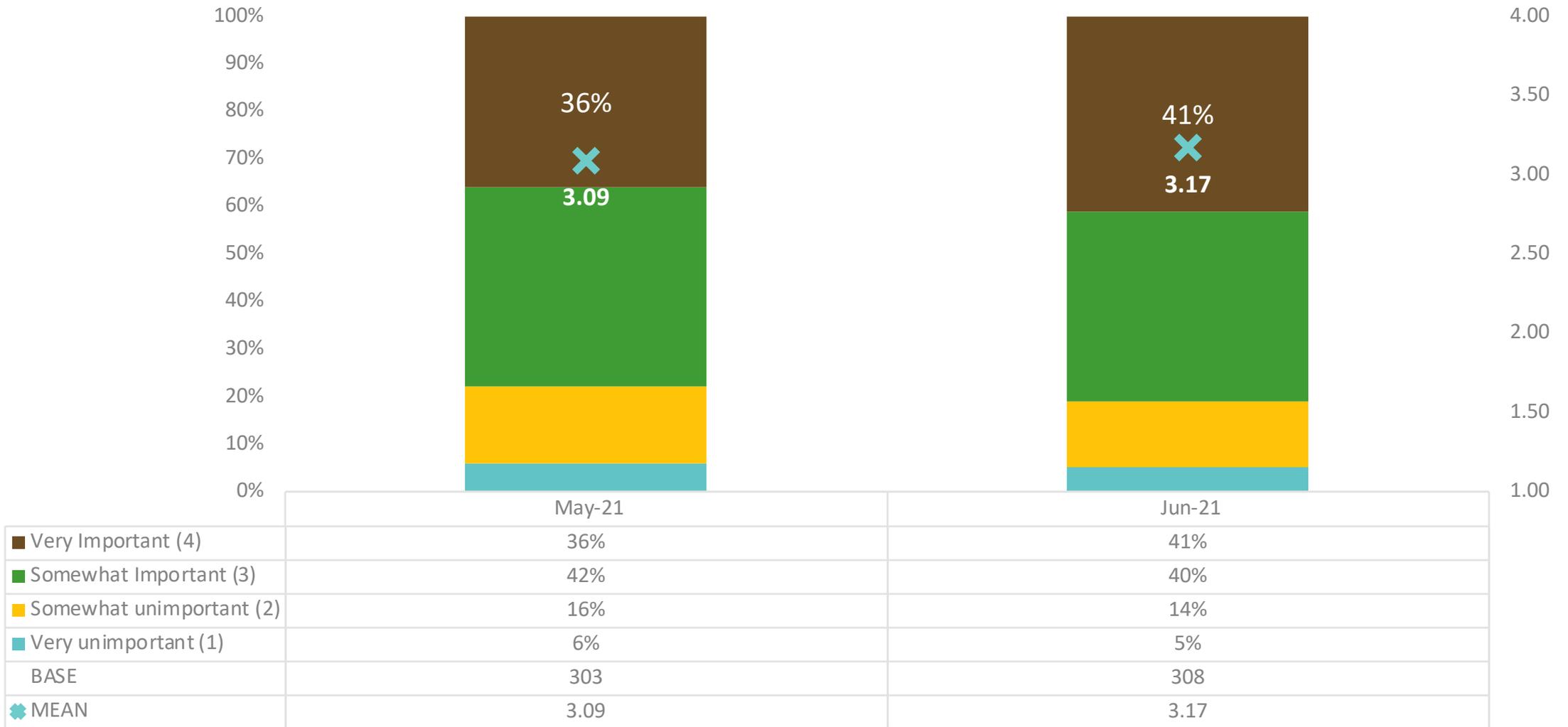
POST-COVID SELECTION FACTOR

Rural/ natural open areas



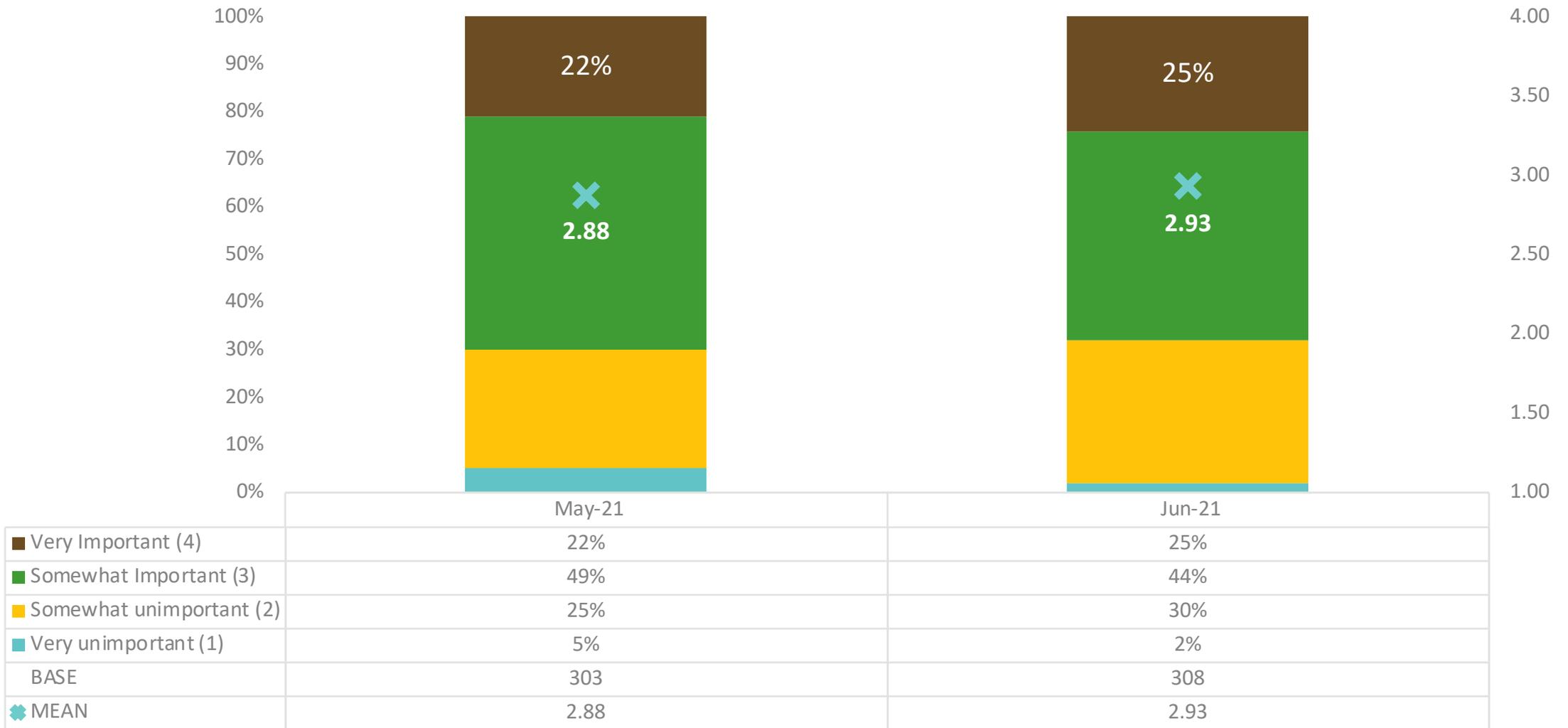
POST-COVID SELECTION FACTOR

No quarantine of any kind for visitors



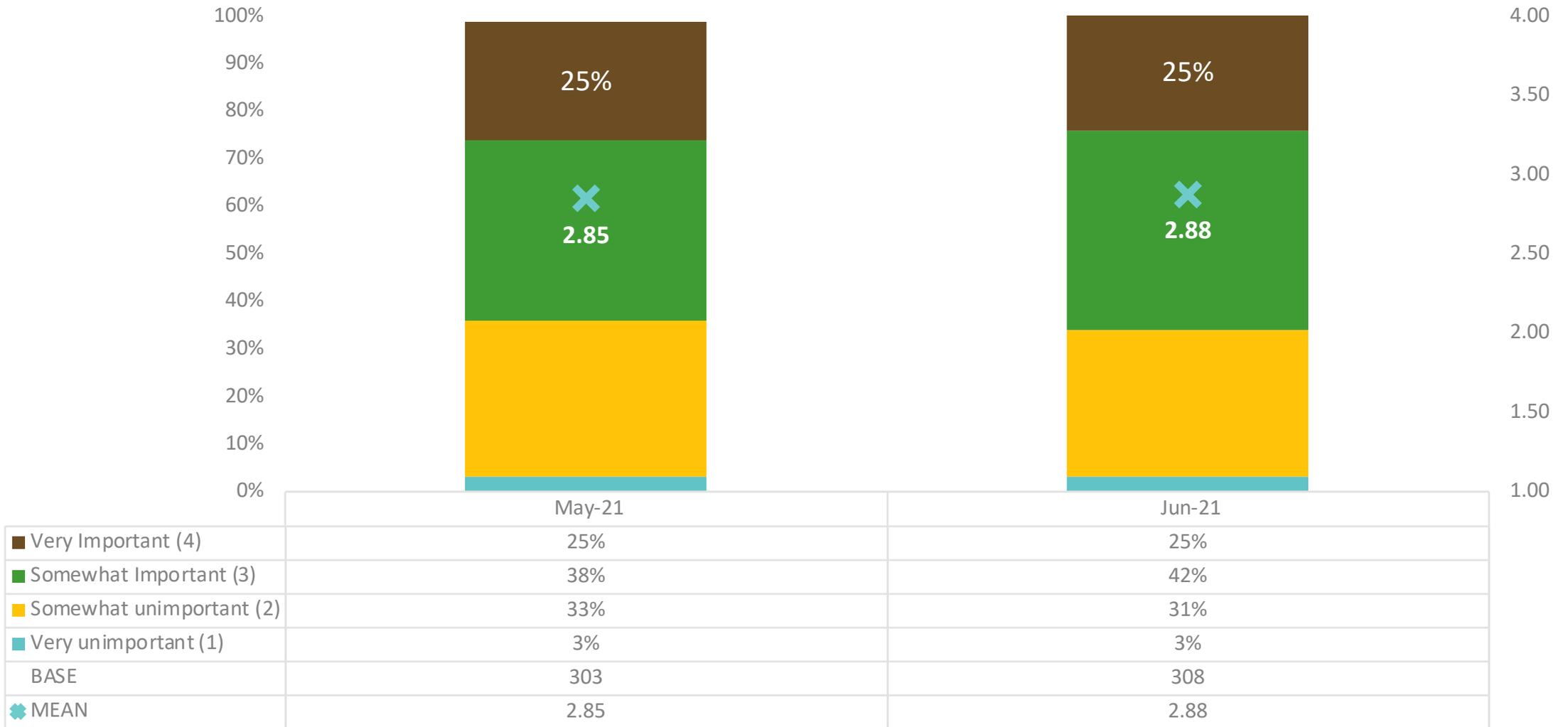
POST-COVID SELECTION FACTOR

Secondary cities of interest

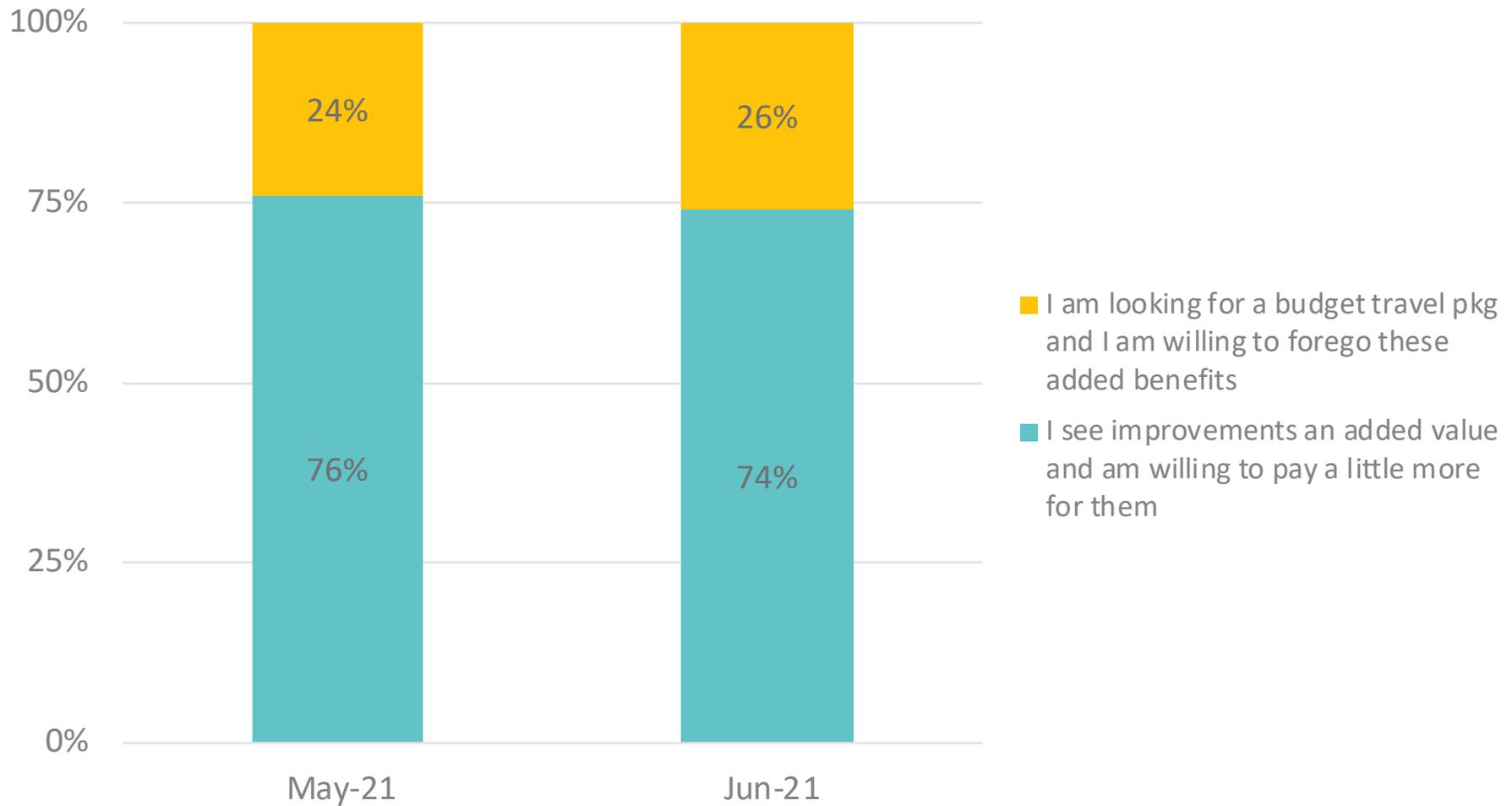


POST-COVID SELECTION FACTOR

Relatively low population density



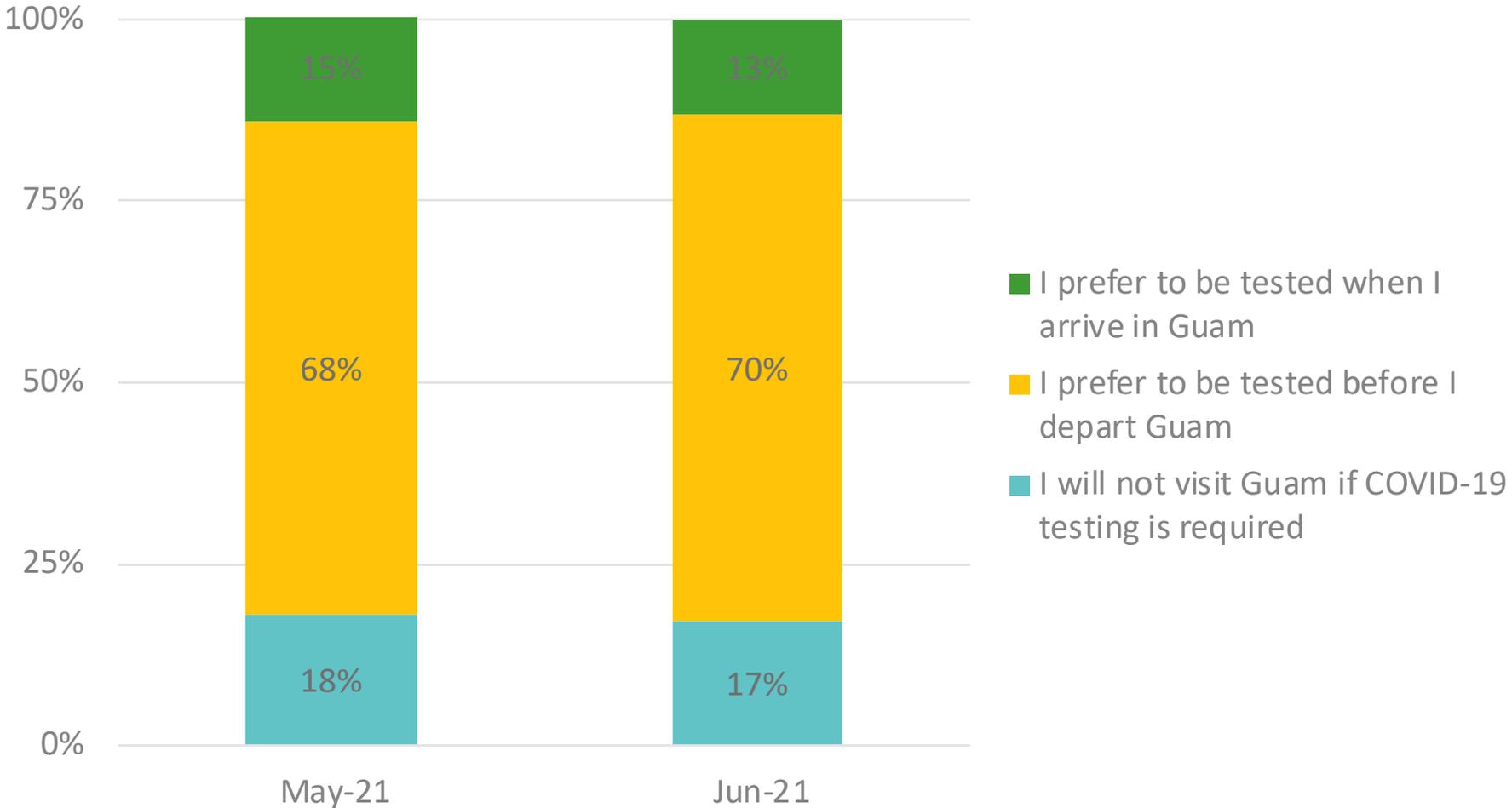
GUAM AIRPORT COVID-19 SAFETY MEASURES



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?



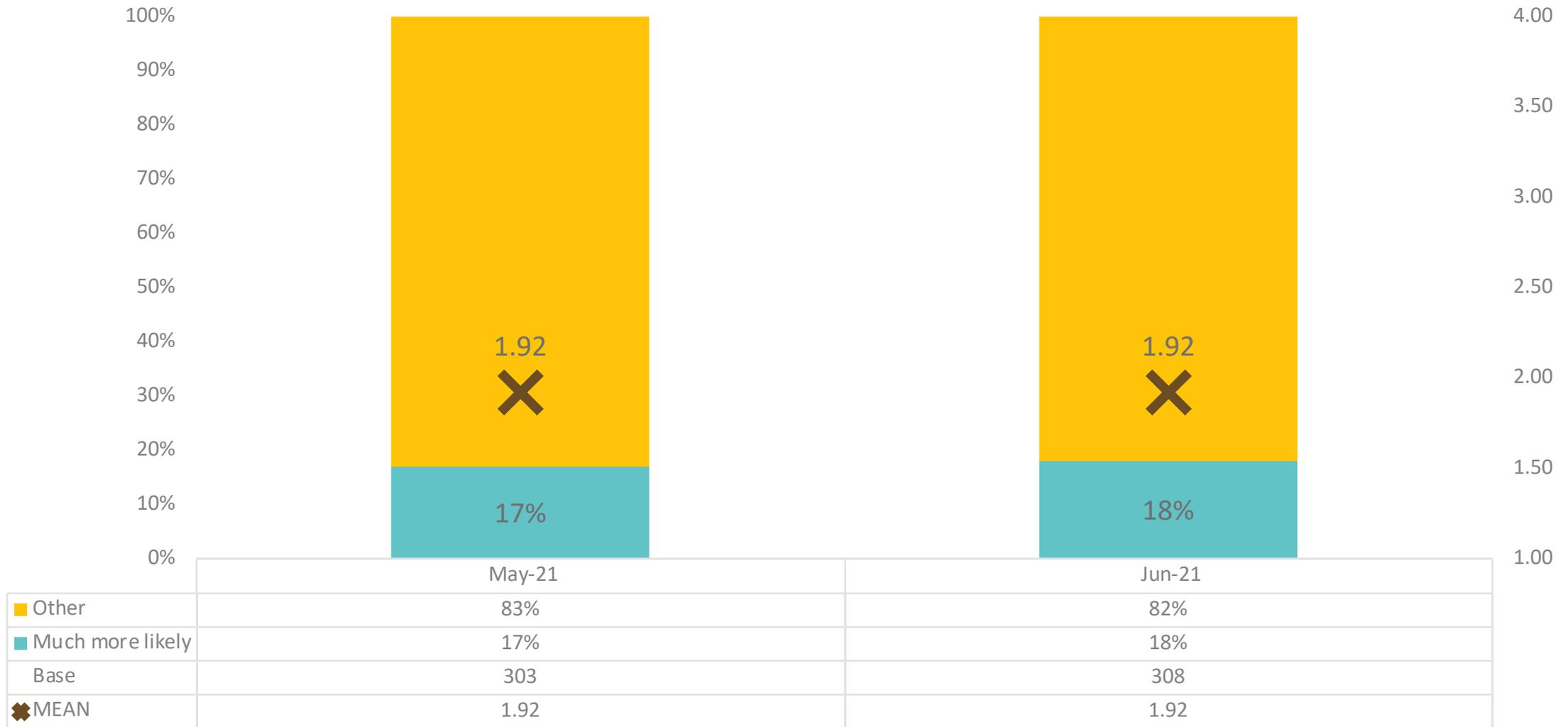
ON-ISLE COVID-19 TESTING PREFERENCE



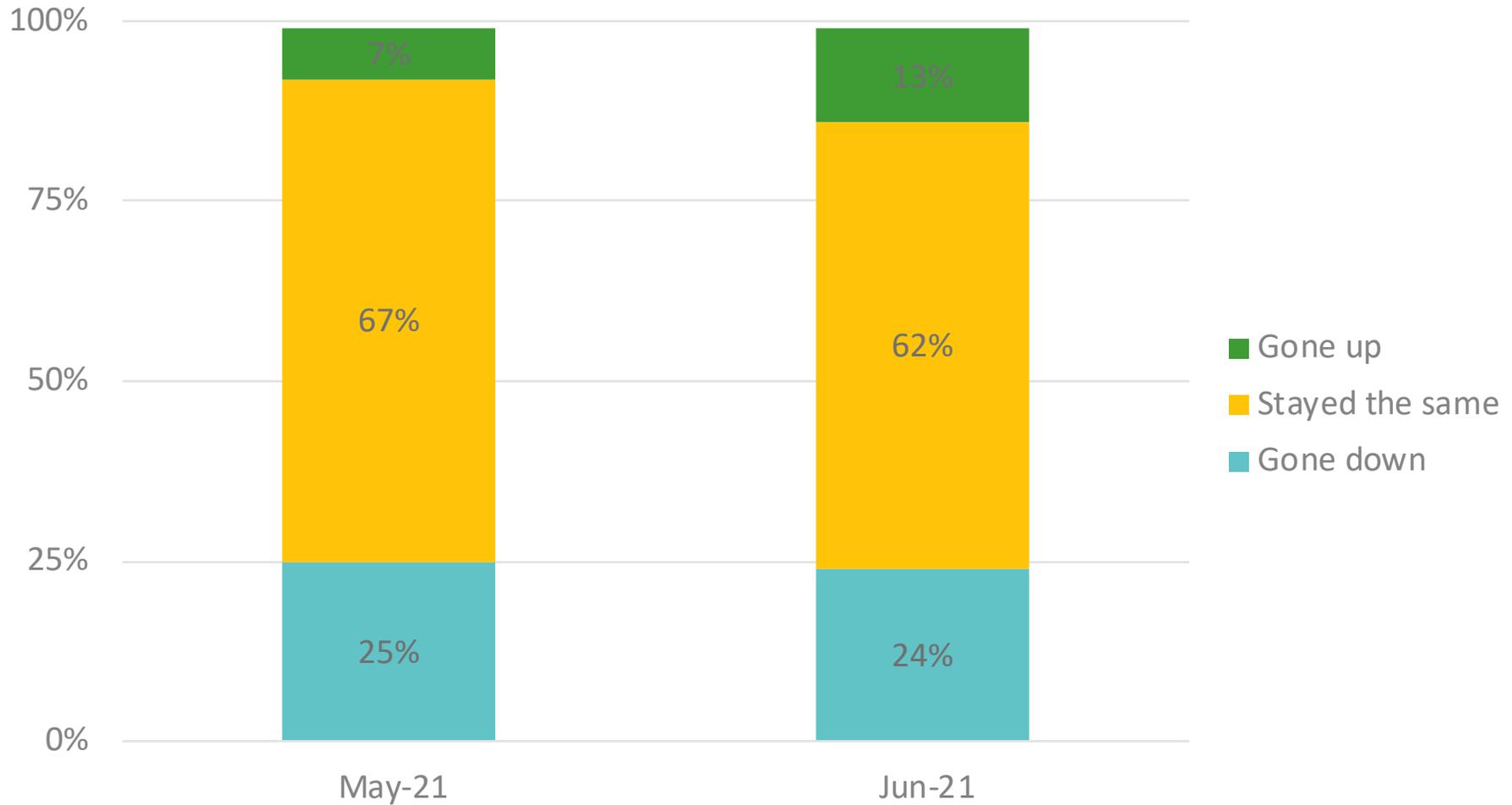
Q: If Guam were to require visitors to pay for COVID-19 testing on island, either upon arrival or before leaving, which would you prefer?



IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC





SECTION 3

VISITOR SATISFACTION



OVERALL SATISFACTION – 10PT SCALE



Caution
small
base

	May-21	Jun-21
Other (1-8)	71%	61%
TopBox (9-10)	29%	39%
Base	45	41
MEAN	7.76	7.71

PRIMARY TRAVEL MOTIVATION

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



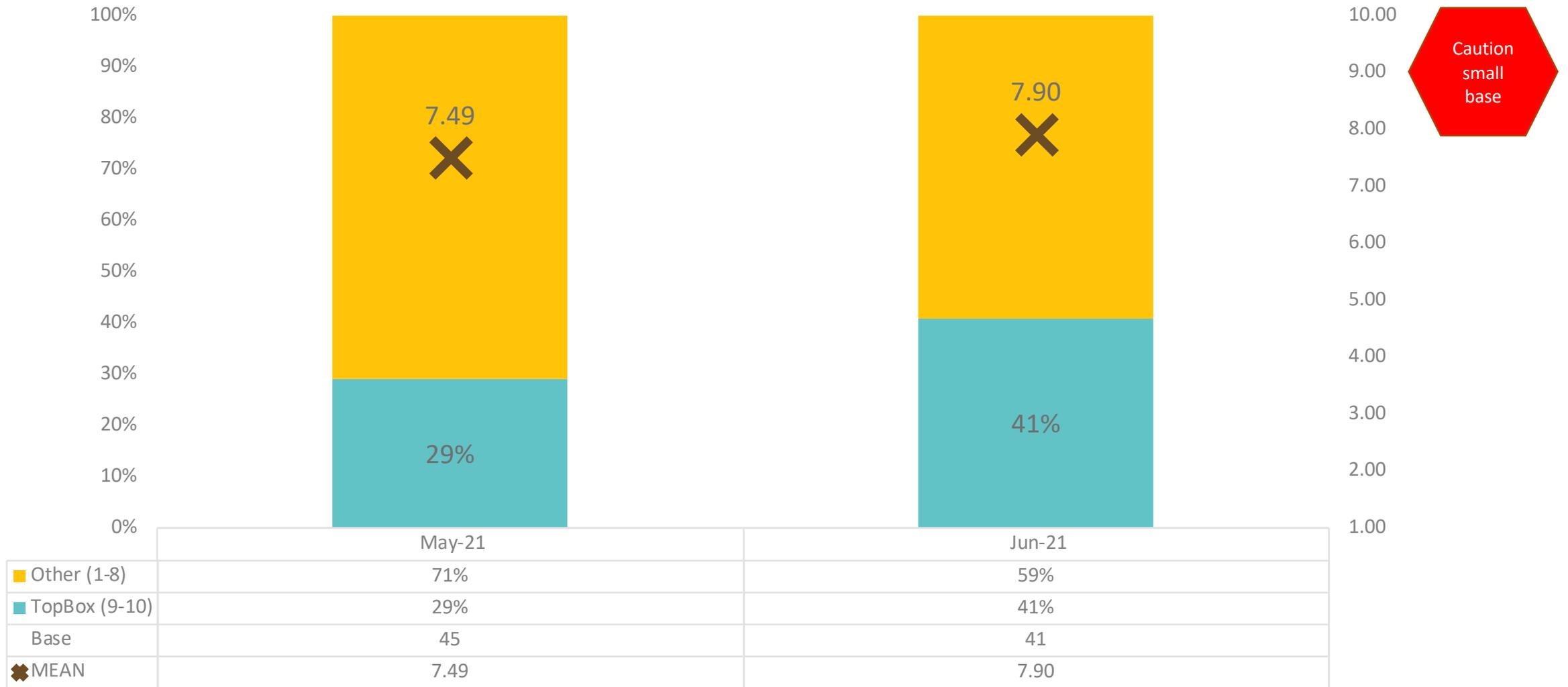
TRAVEL MOTIVATIONS – TOP 3

Tracking

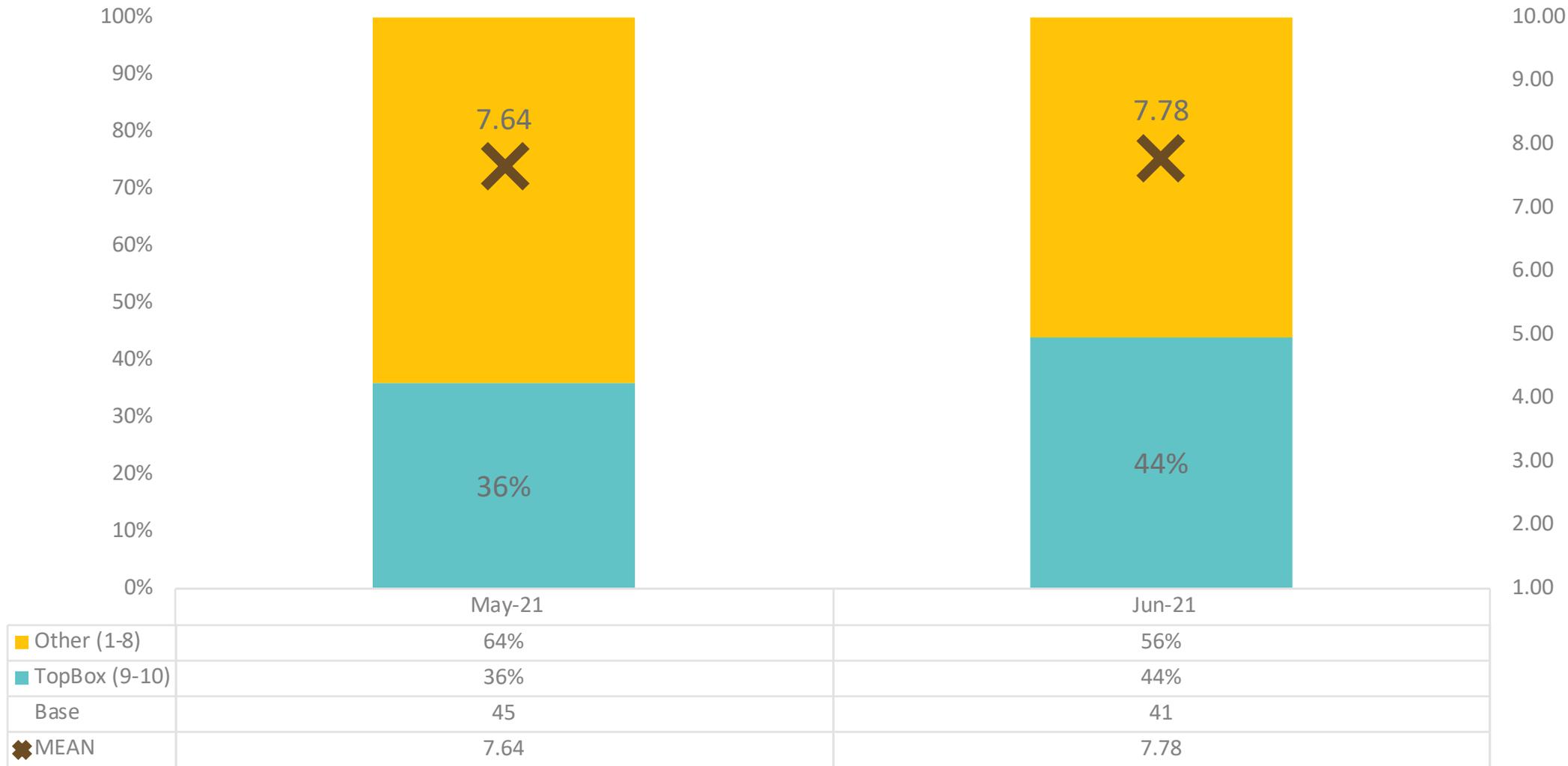
	May-21	Jun-21
BASE	45	41
Beautiful seas, beaches, tropical climate	44%	59%
Safe place to spend a vacation	42%	37%
A previous trip	27%	20%
Short travel time	27%	15%
Sightseeing	27%	27%
Relaxation	27%	22%
Recommendation from friend/ relative/ travel agency	13%	15%
Water activity	13%	22%
Price	11%	12%



BRAND ADVOCACY – 10PT SCALE



BRAND LOYALTY – 10PT SCALE



Caution
small
base

GUAM TRAVELER – TRIP MOTIVATIONS

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



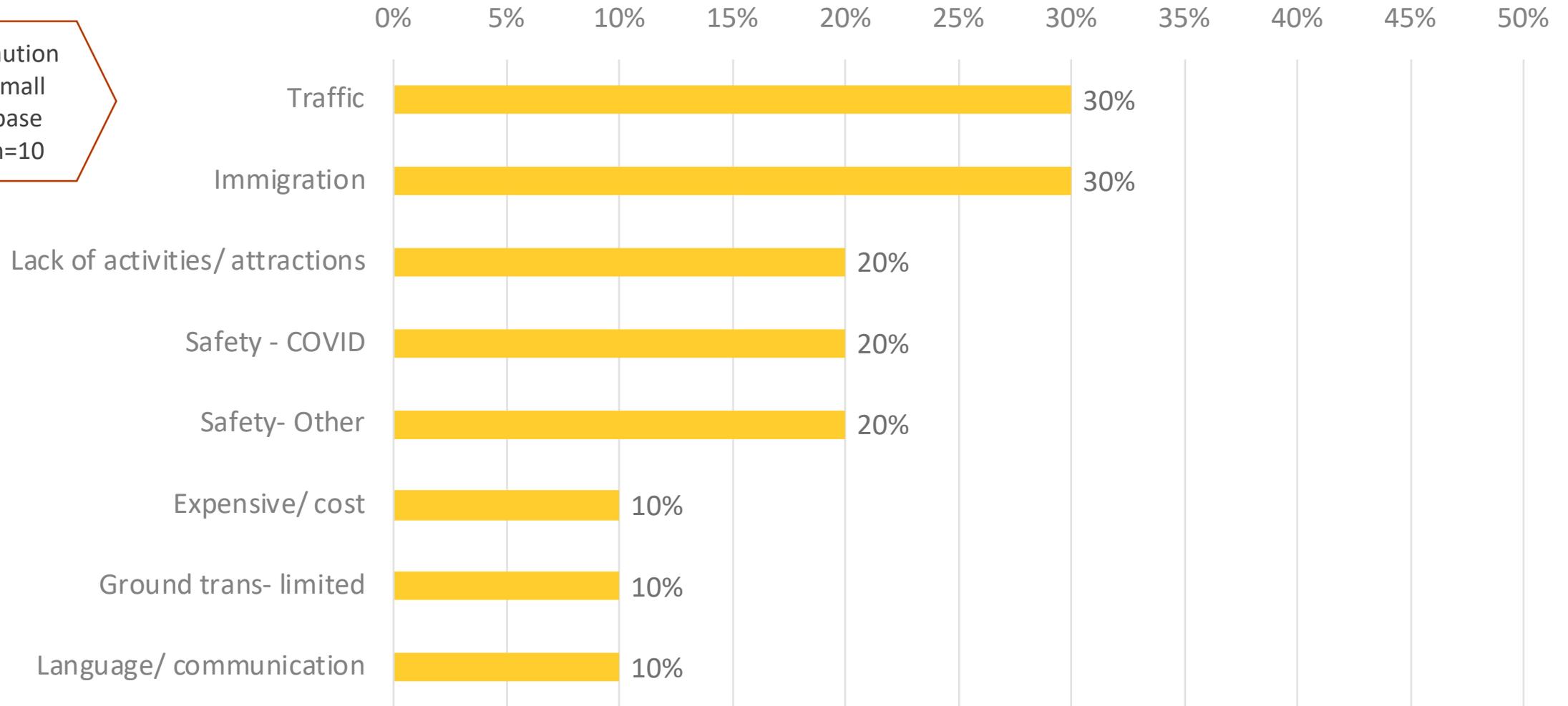
GUAM TRAVELERS – DRAWBACKS

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



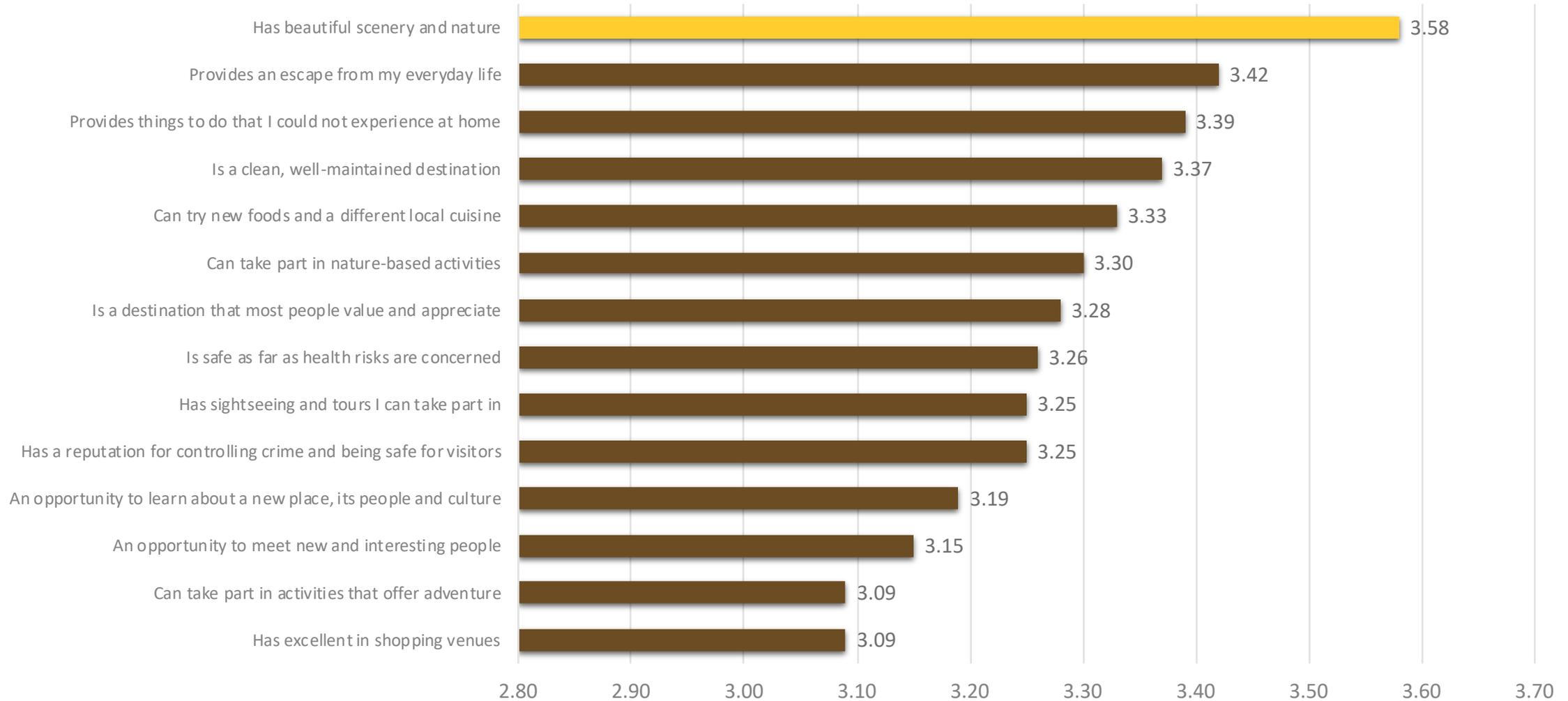
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=10



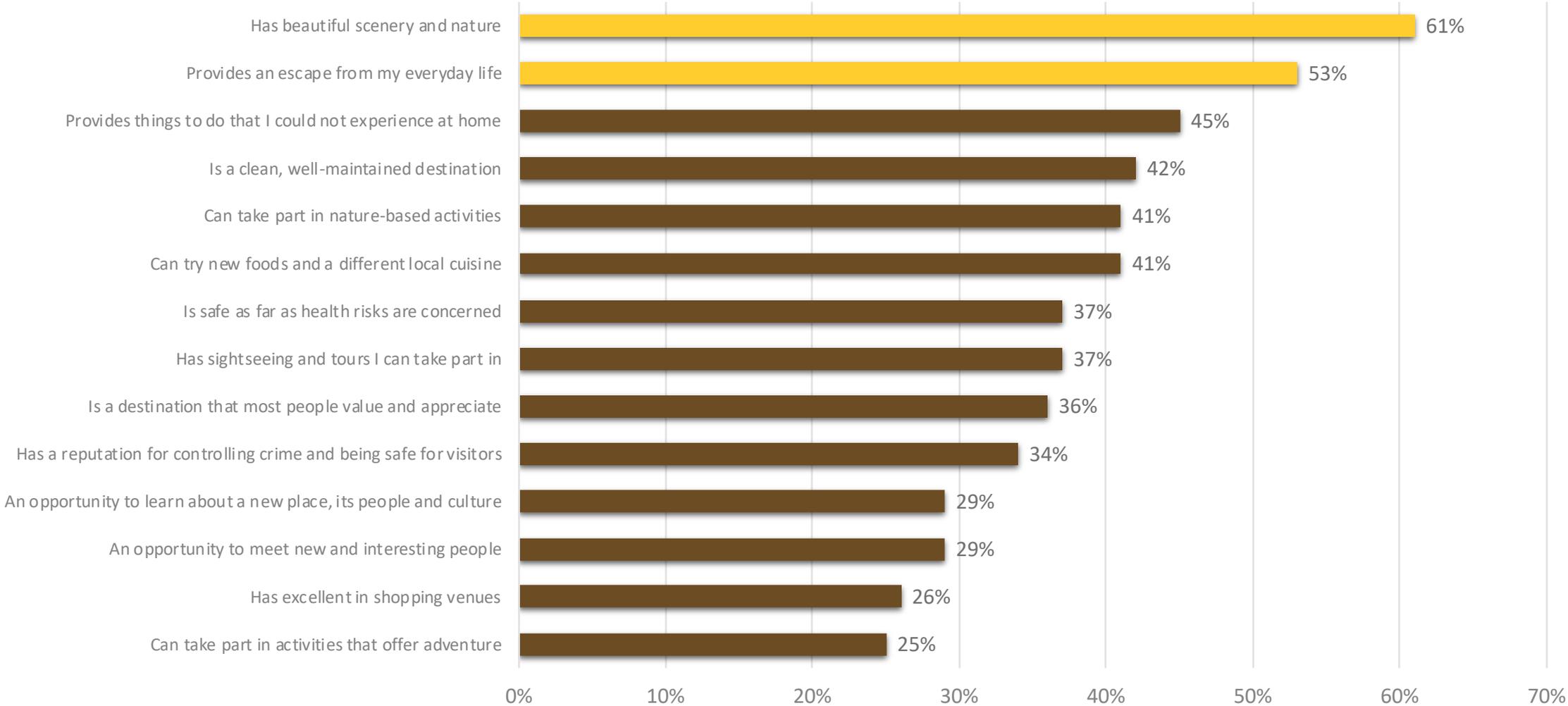
SELECTION FACTORS – SATISFACTION

MEAN SCORES 4PT SCALE

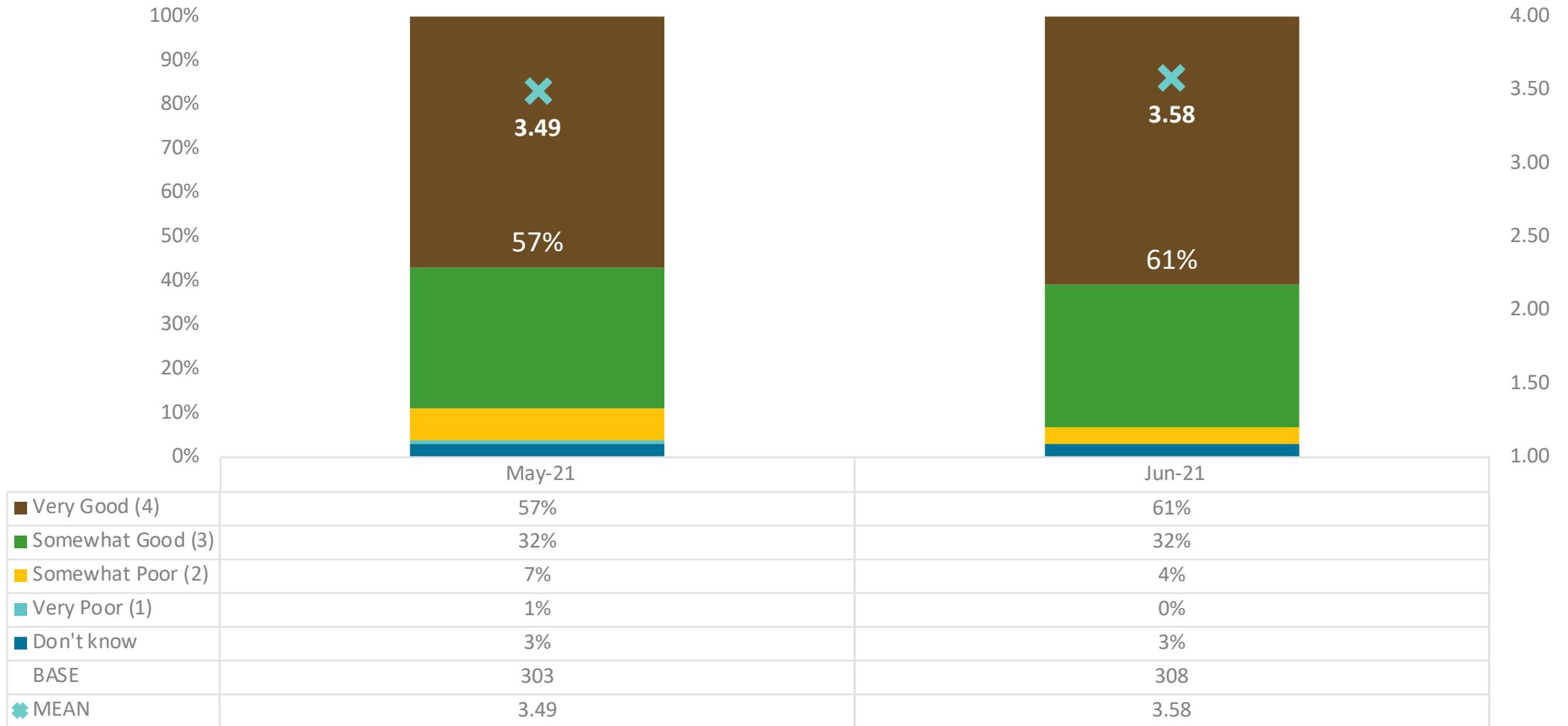


SELECTION FACTORS – SATISFACTION

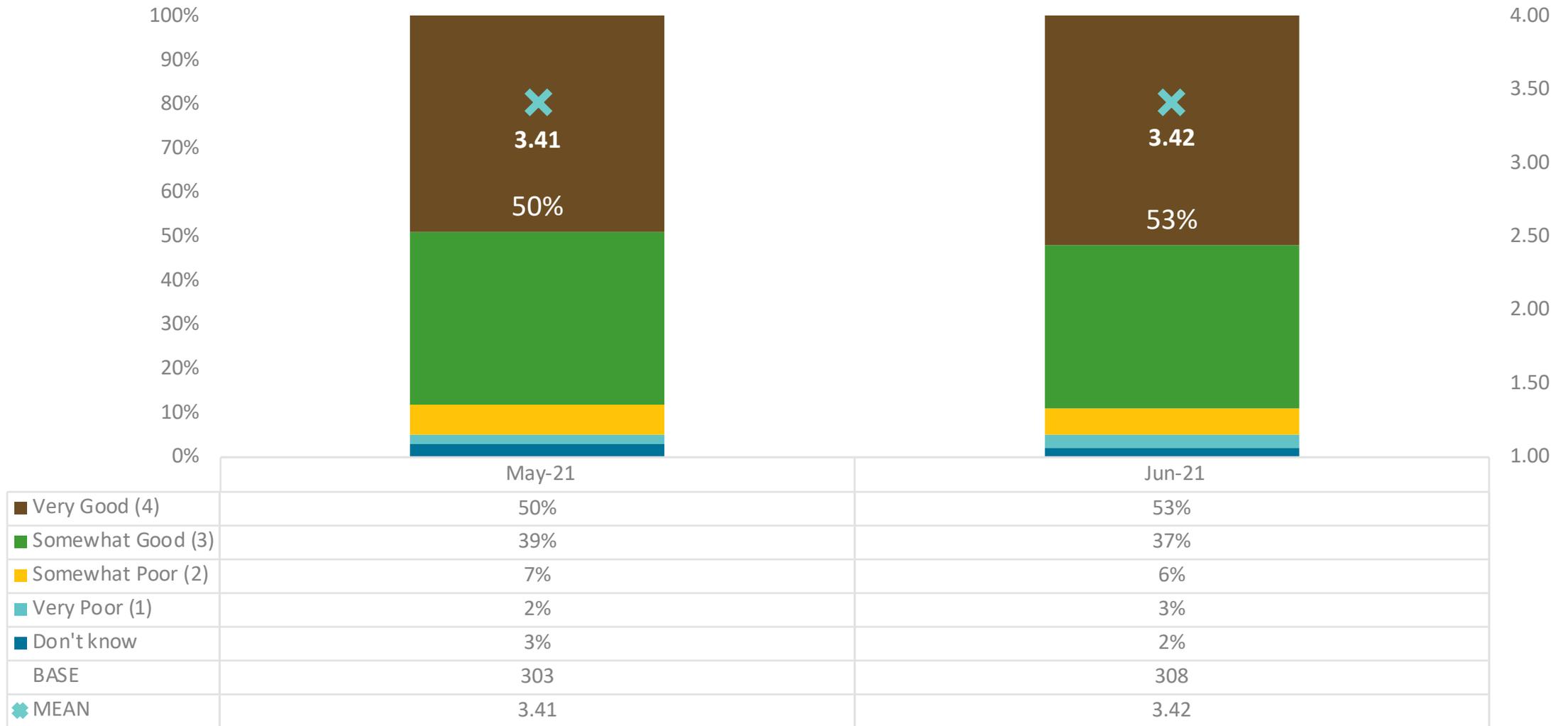
TOP BOX (VERY GOOD)



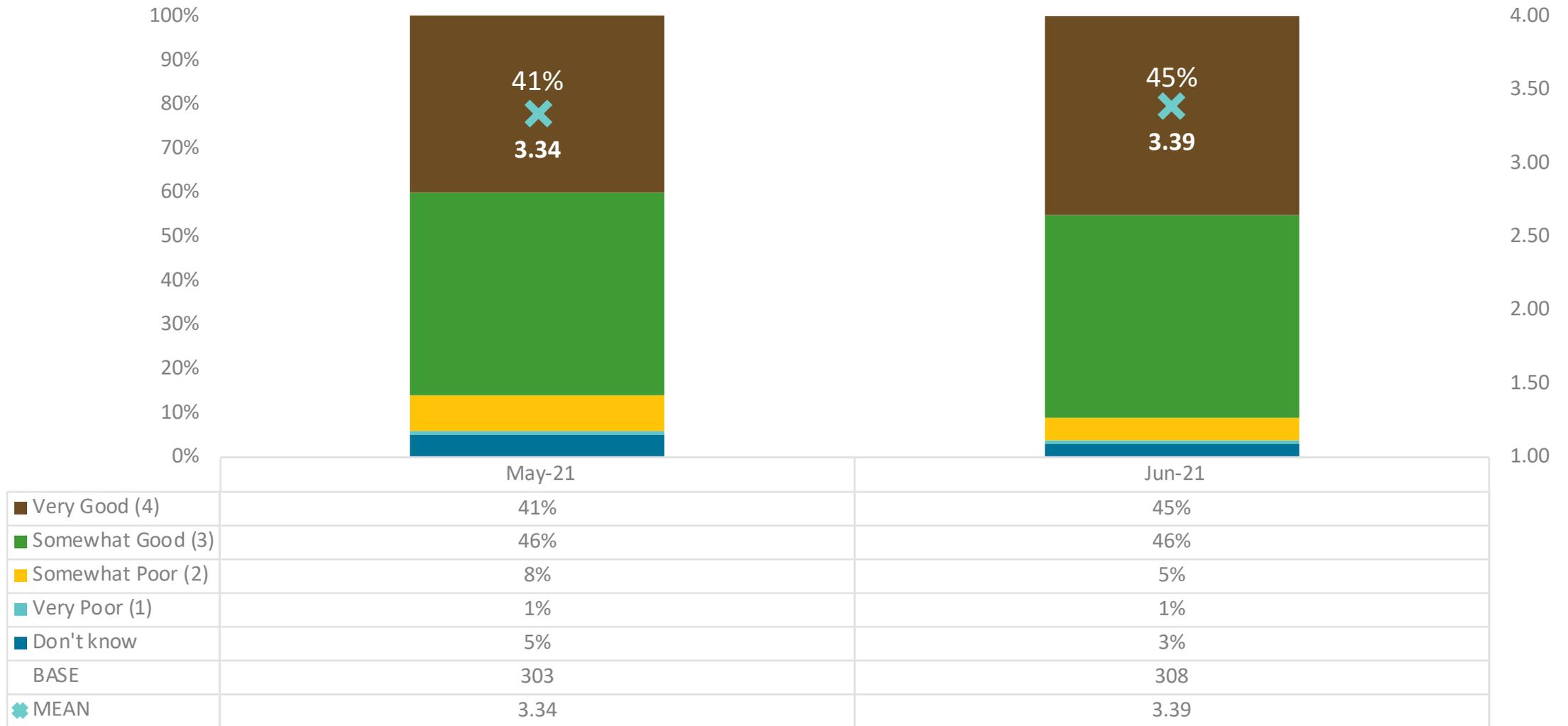
Has beautiful scenery and nature



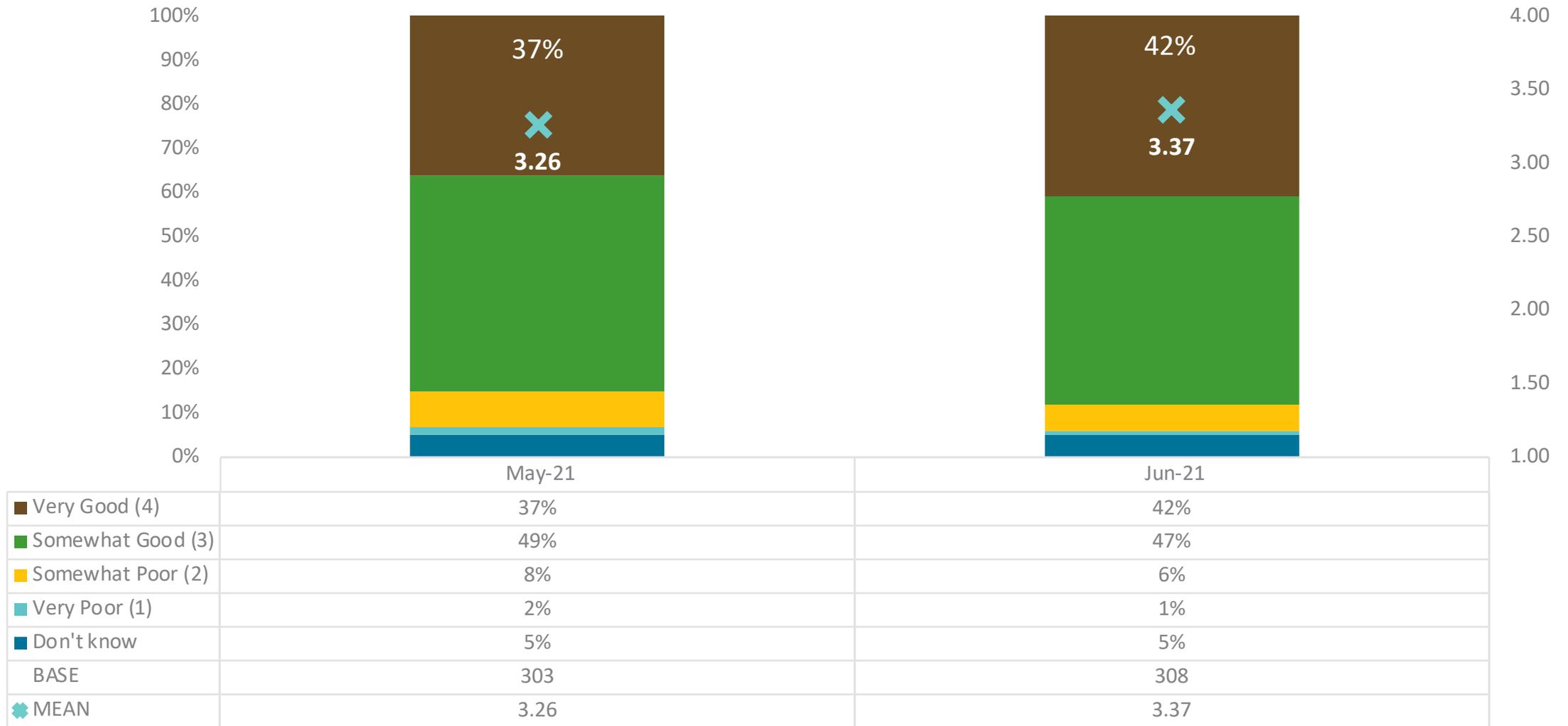
Provides an escape from my everyday life



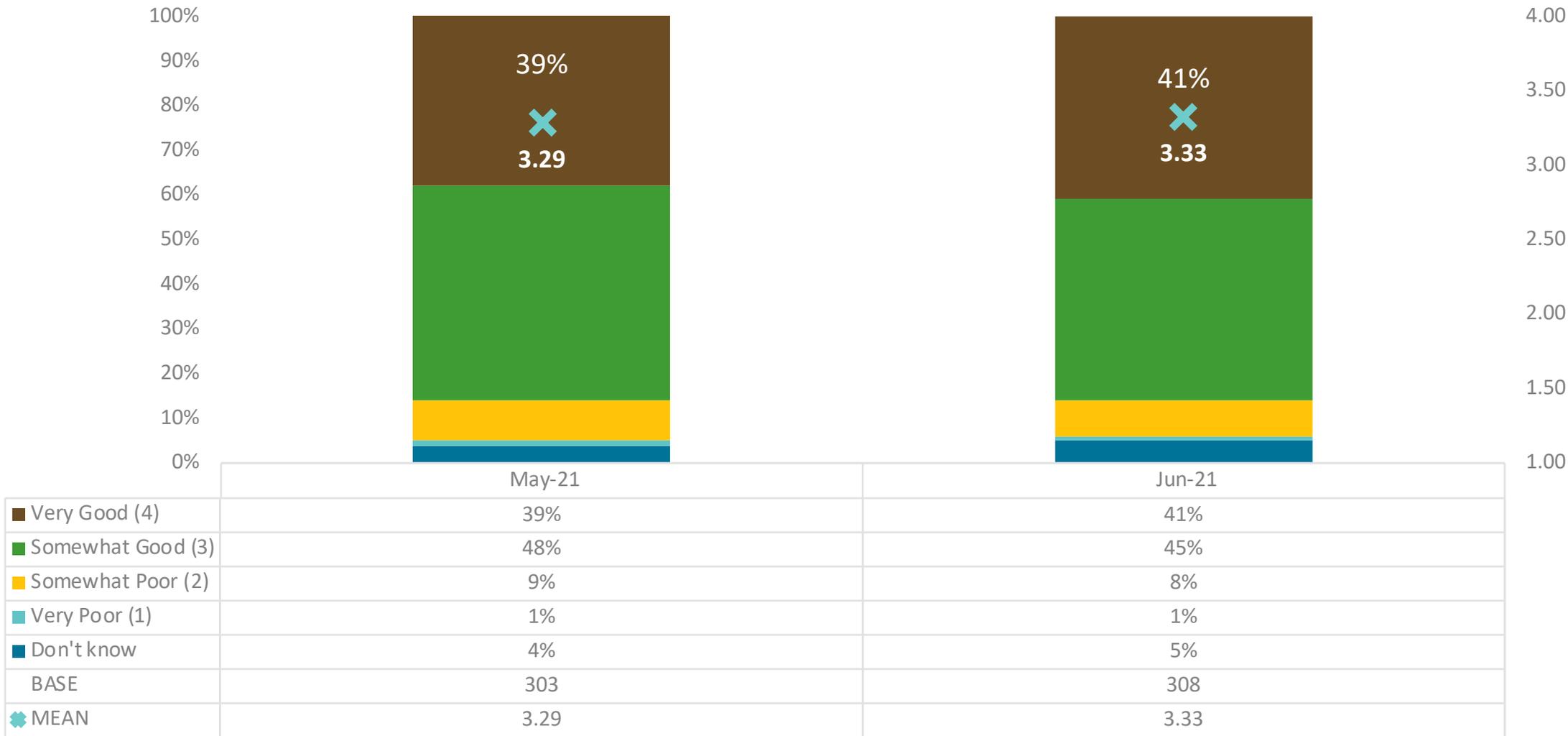
Provides things to do that I could not experience at home



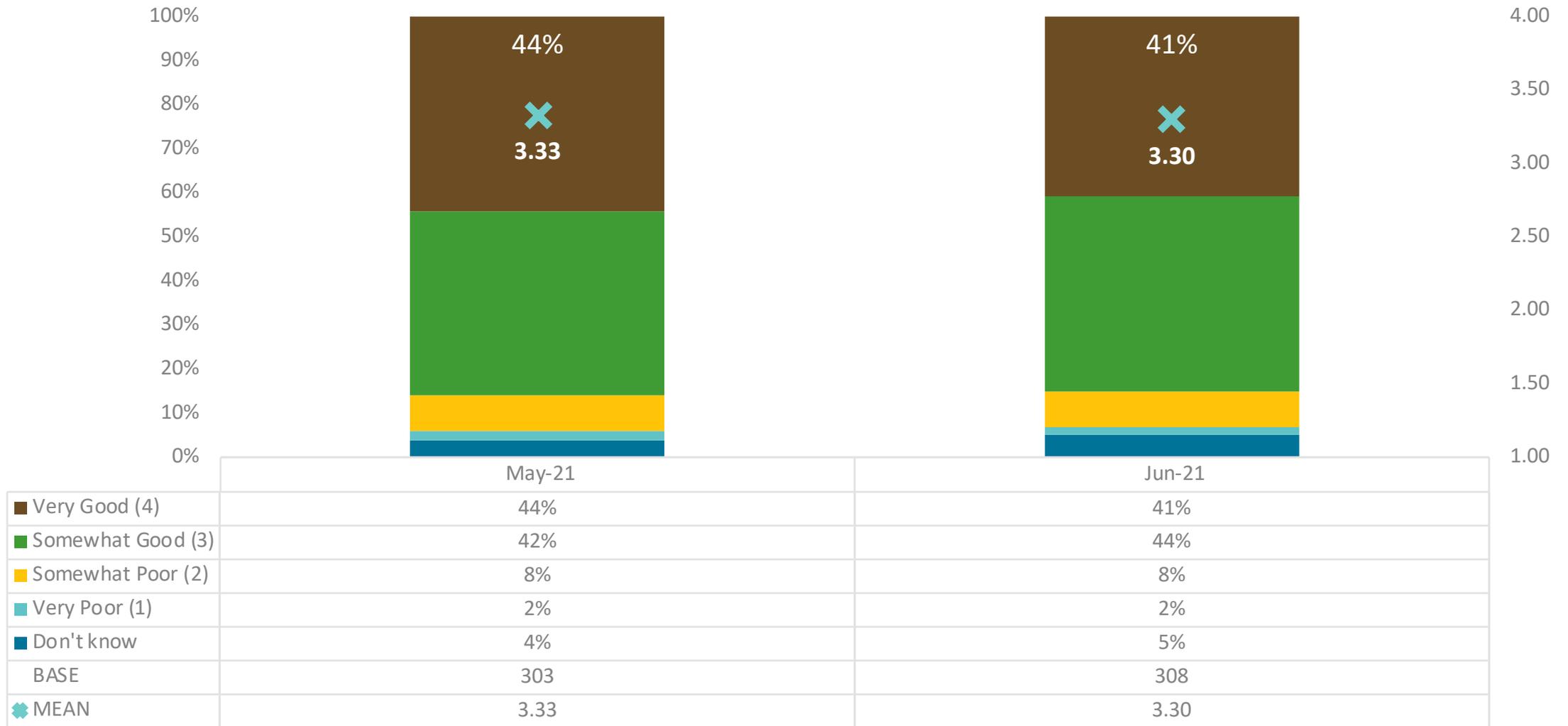
Is a clean, well-maintained destination



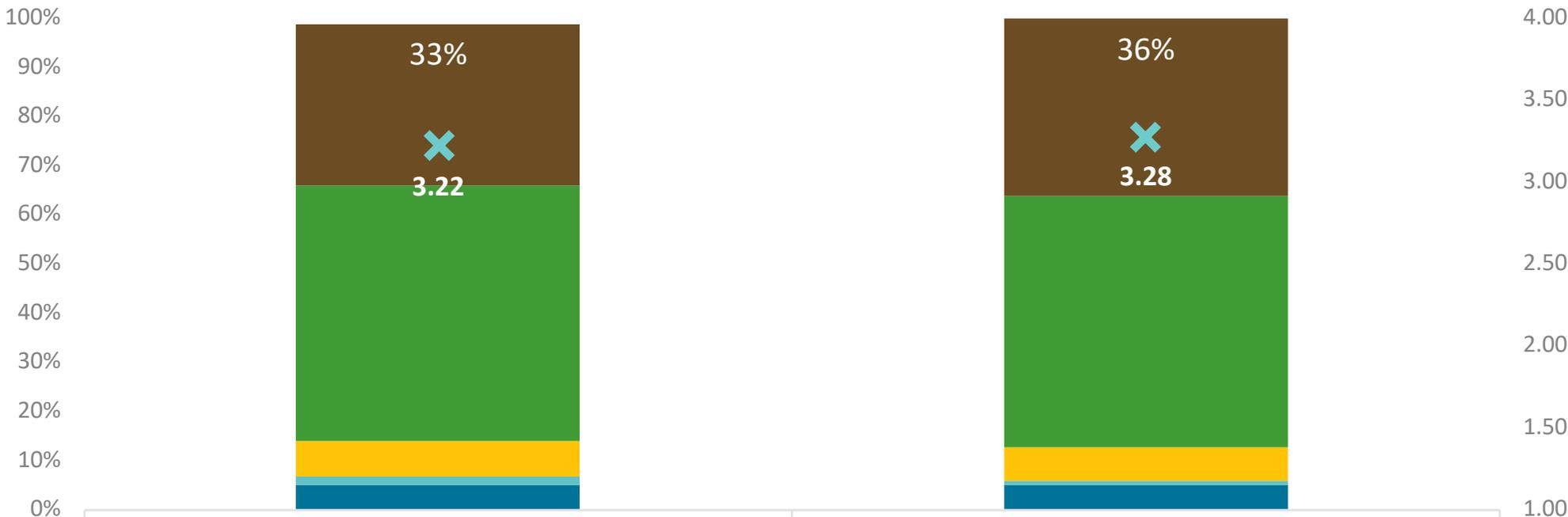
Can try new foods and a different local cuisine



Can take part in nature-based activities



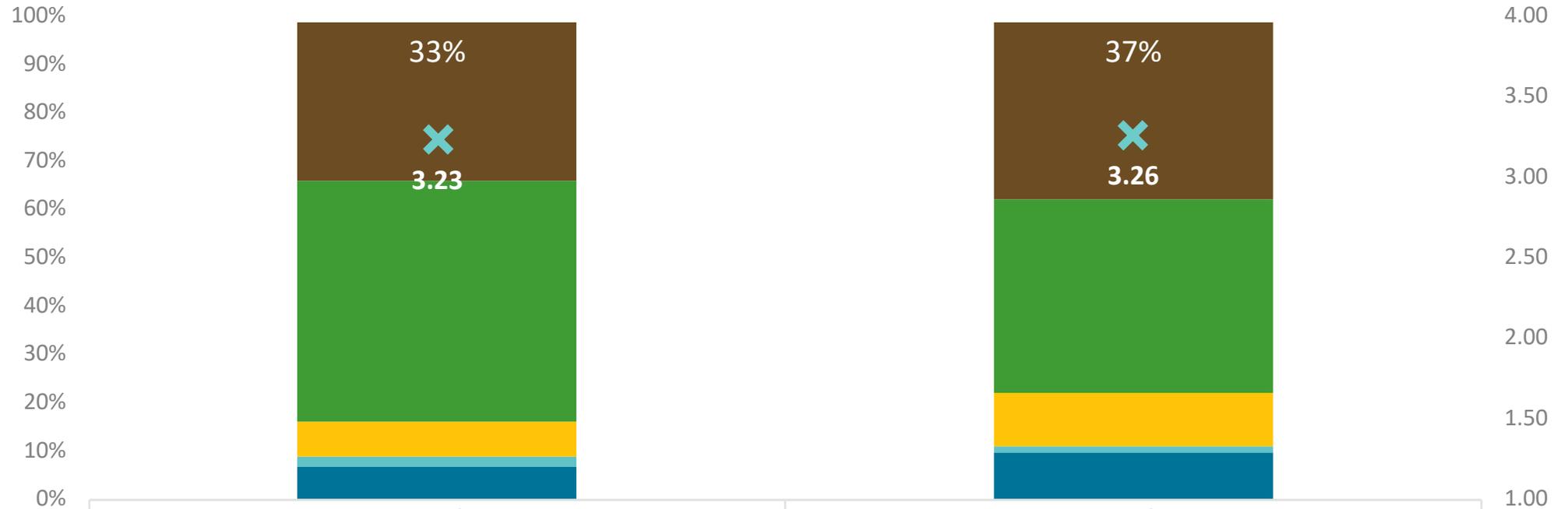
Is a destination that most people value and appreciate



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

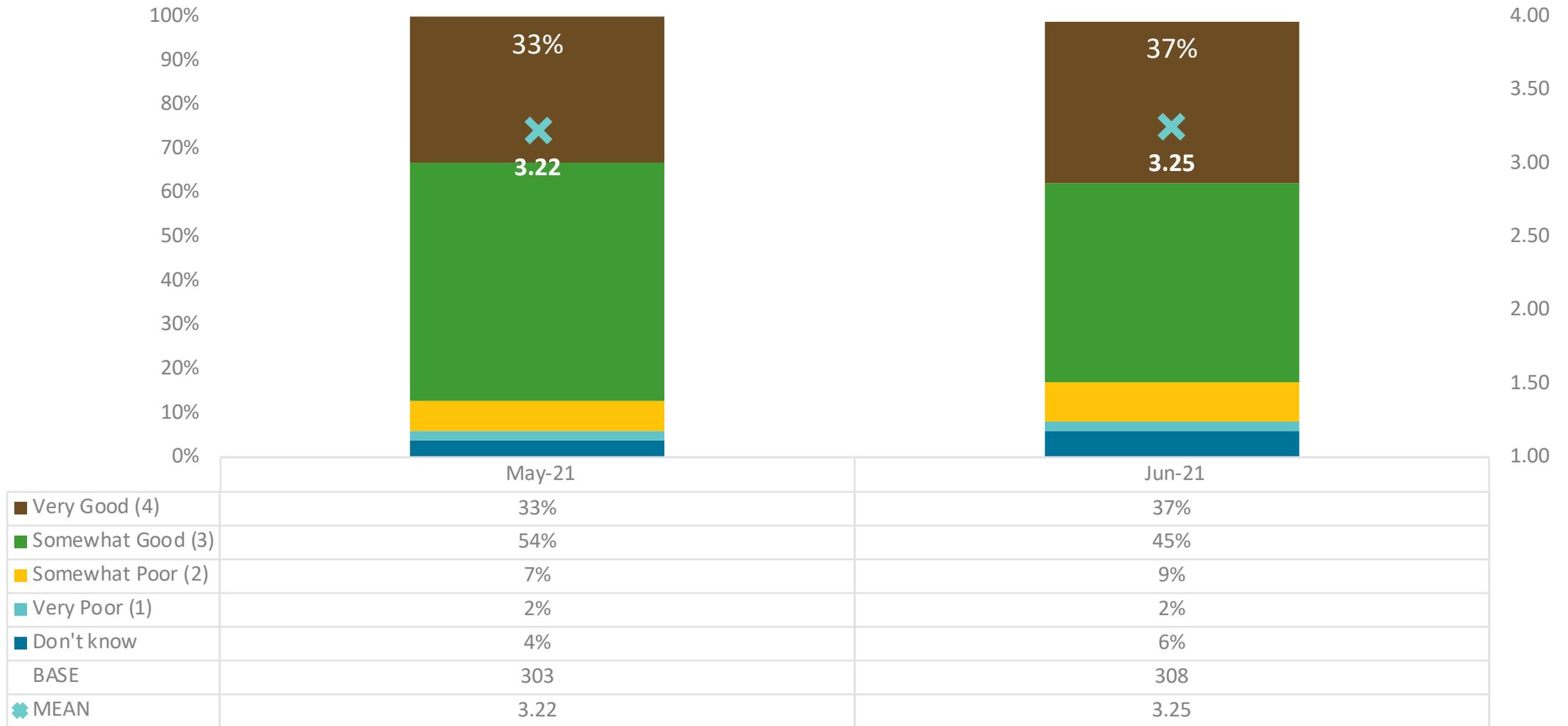


Is safe as far as health risks are concerned

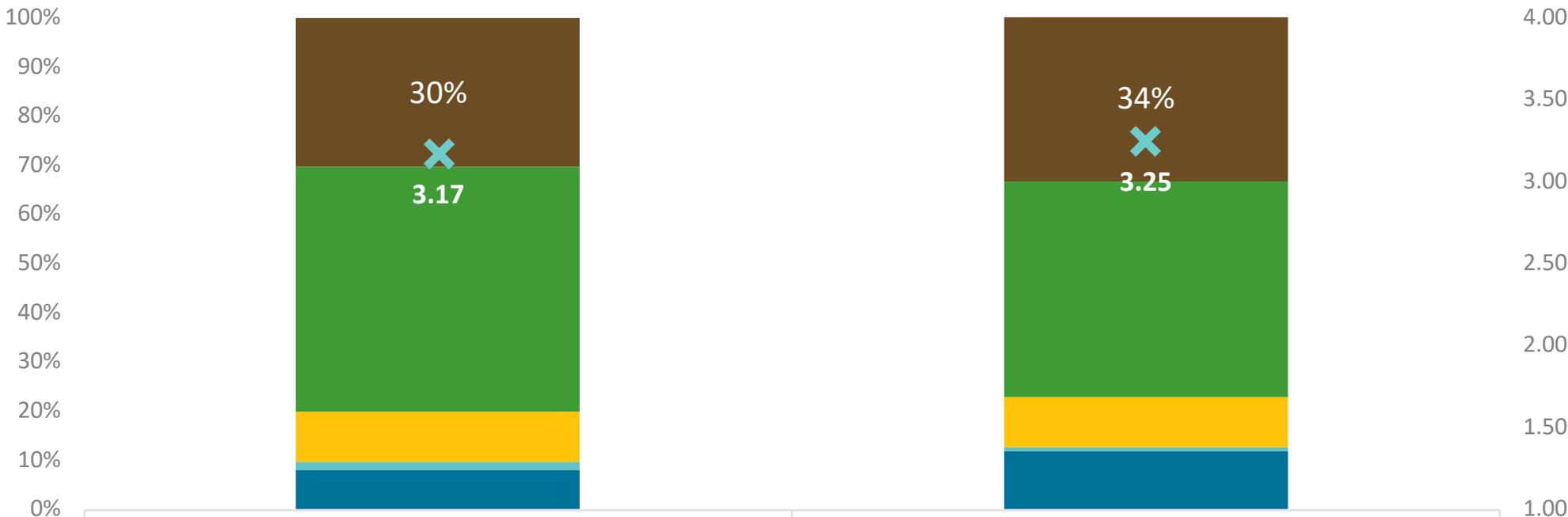


	May-21	Jun-21
Very Good (4)	33%	37%
Somewhat Good (3)	50%	40%
Somewhat Poor (2)	7%	11%
Very Poor (1)	2%	1%
Don't know	7%	10%
BASE	303	308
MEAN	3.23	3.26

Has sightseeing and tours I can take part in



Has a reputation for controlling crime and being safe for visitors



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



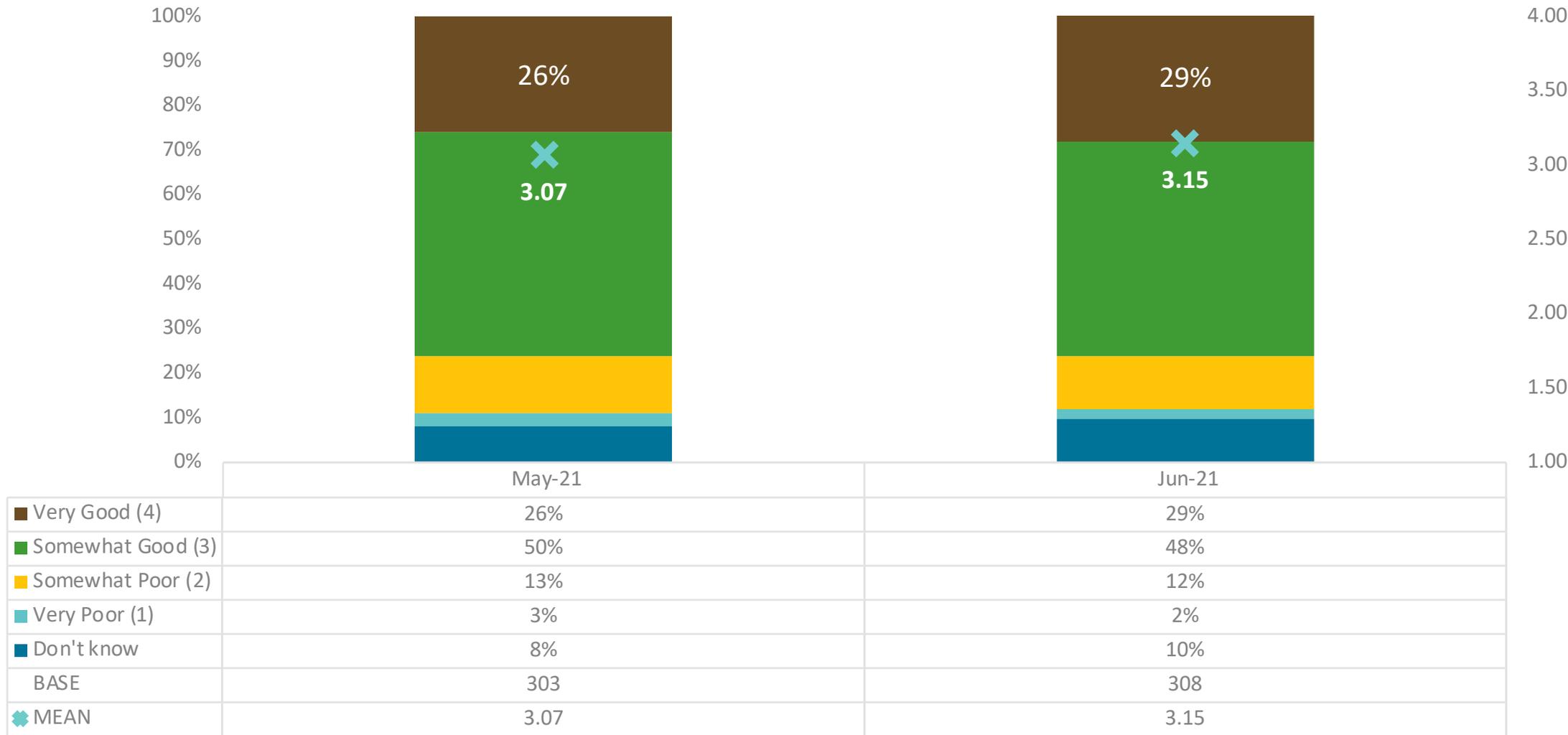
An opportunity to learn about a new place, its people and culture



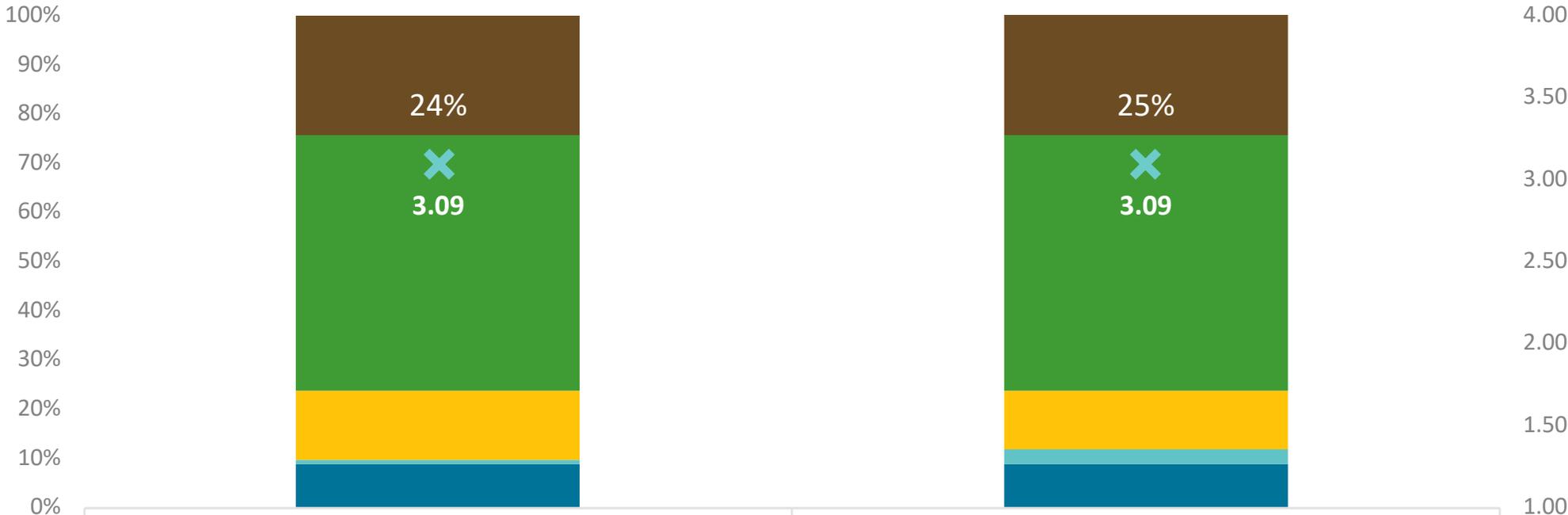
	May-21	Jun-21
Very Good (4)	28%	29%
Somewhat Good (3)	52%	55%
Somewhat Poor (2)	13%	9%
Very Poor (1)	1%	1%
Don't know	6%	6%
BASE	303	308
MEAN	3.13	3.19



An opportunity to meet new and interesting people



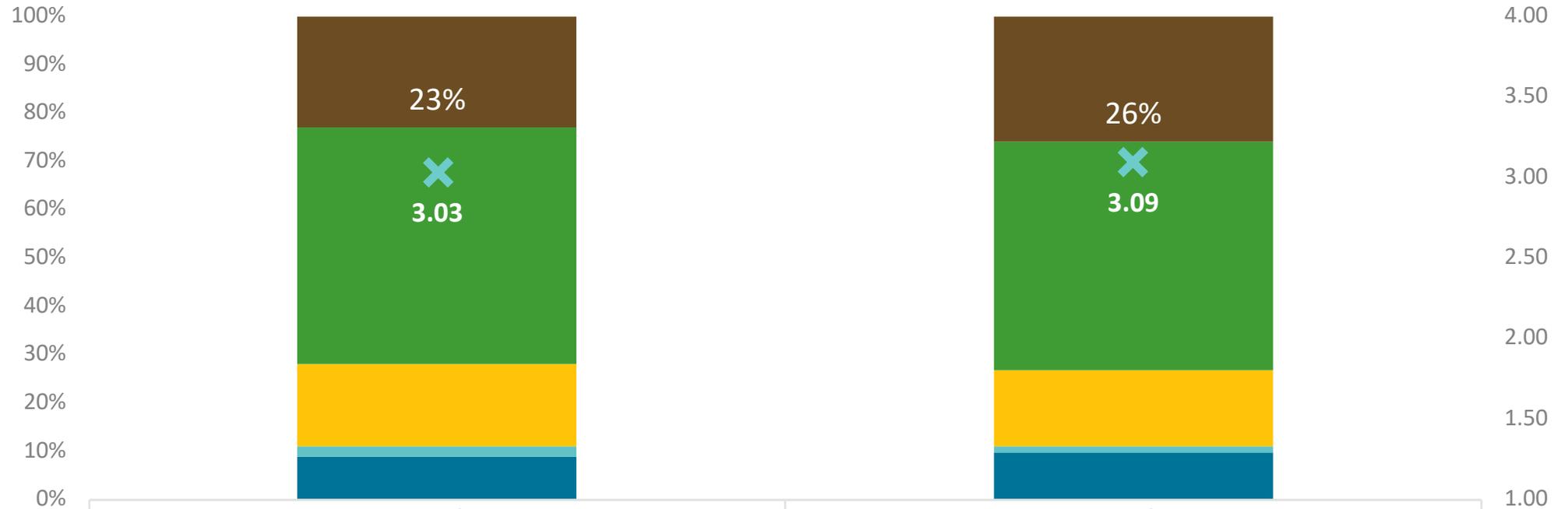
Can take part in activities that offer adventure



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

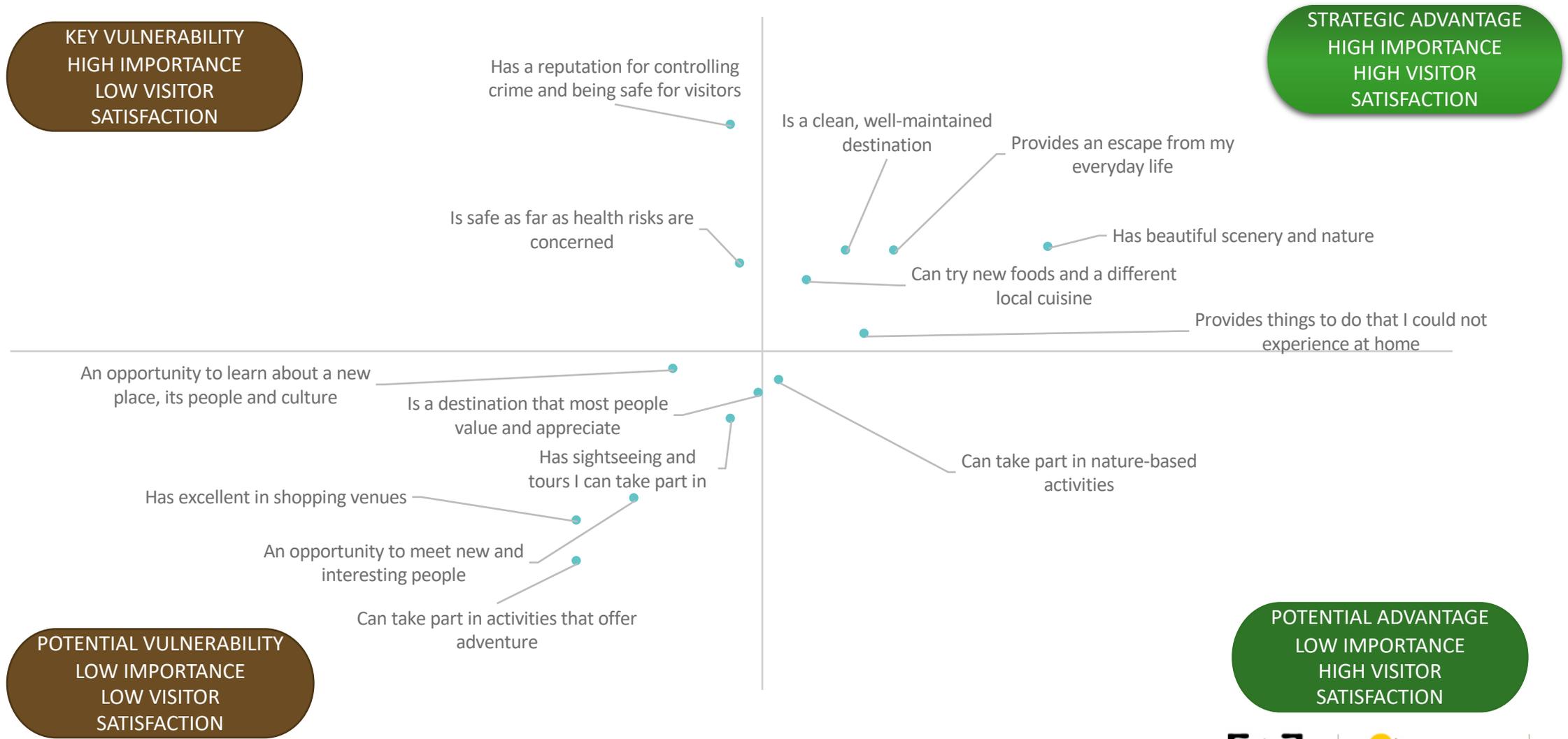


Has excellent shopping in venues



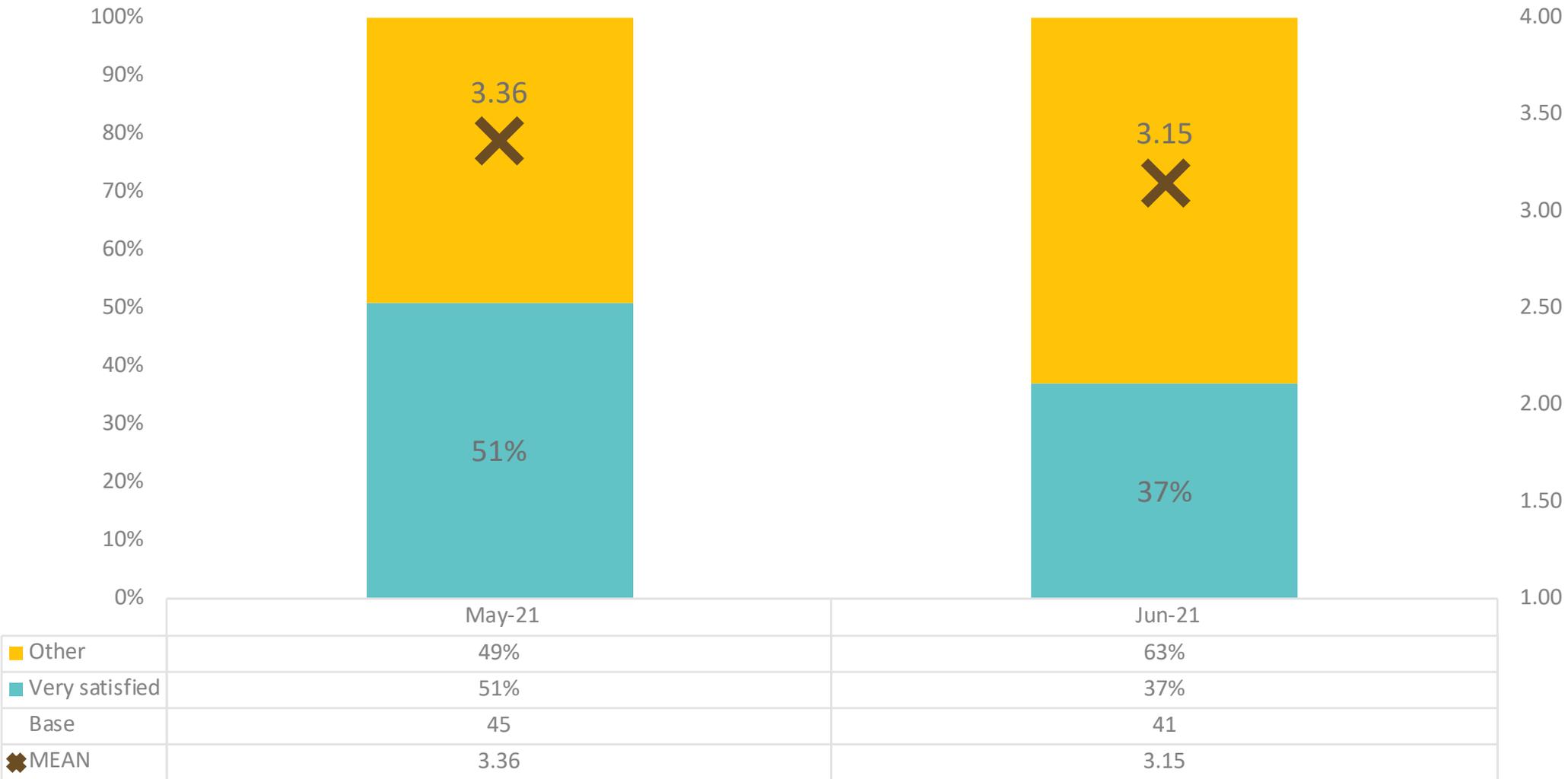
	May-21	Jun-21
Very Good (4)	23%	26%
Somewhat Good (3)	49%	47%
Somewhat Poor (2)	17%	16%
Very Poor (1)	2%	1%
Don't know	9%	10%
BASE	303	308
MEAN	3.03	3.09

NEED-GAP ANALYSIS



ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE

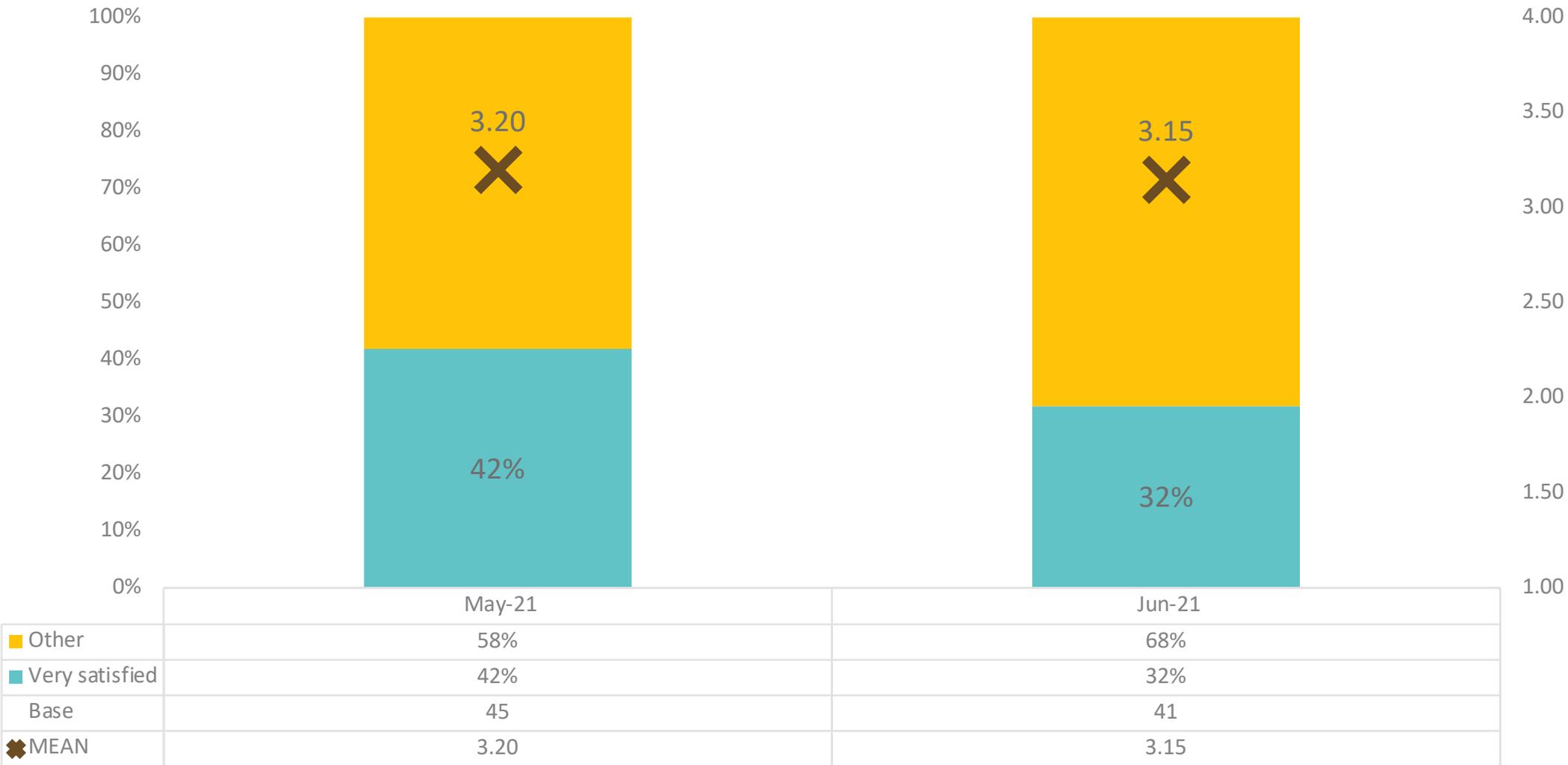


Caution
small
base



QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE

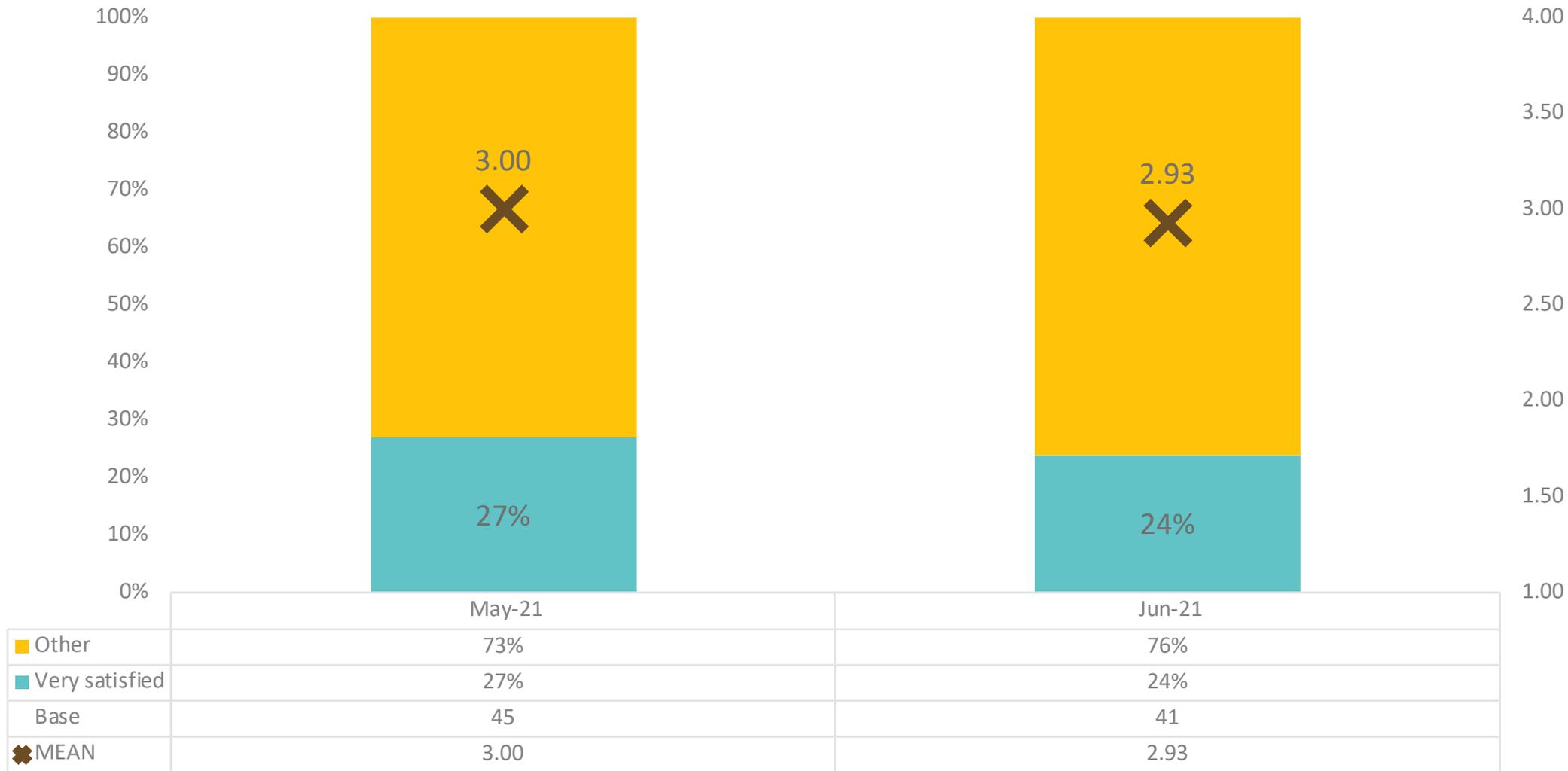


Caution
small
base



TRANSPORTATION OPTIONS – SATISFACTION

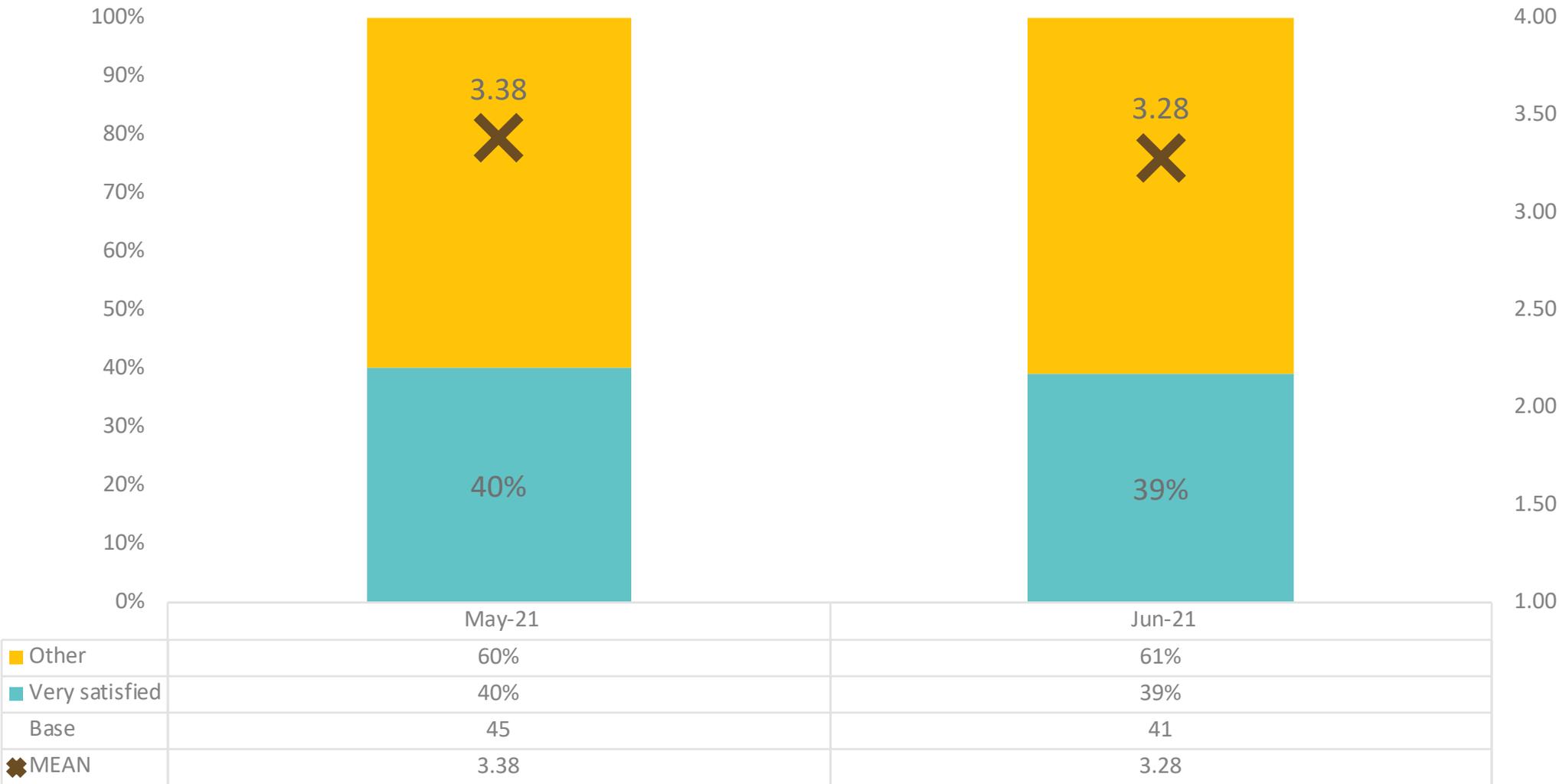
4PT RATING SCALE



Caution
small
base

VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

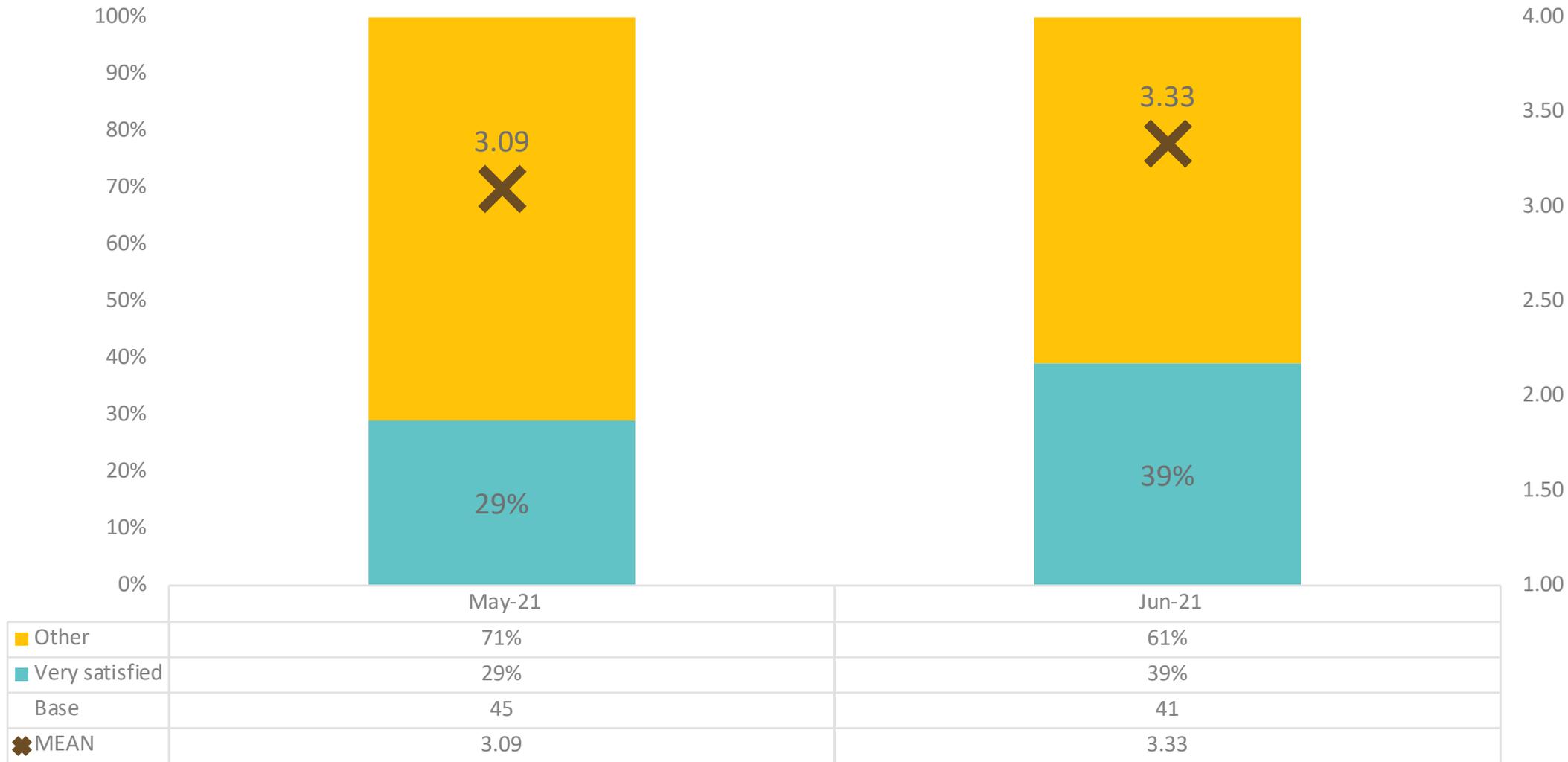


Caution
small
base



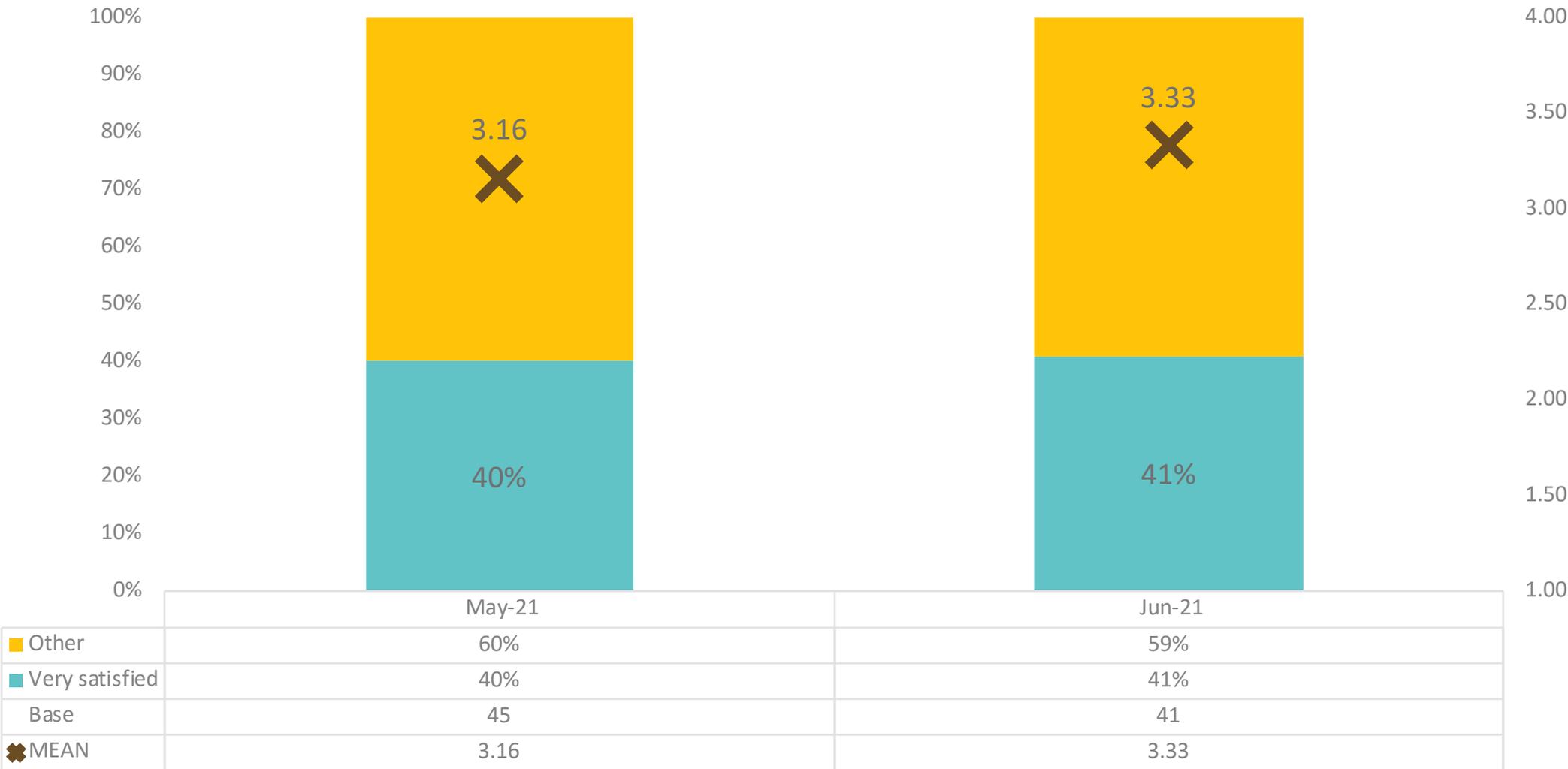
VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE



SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE

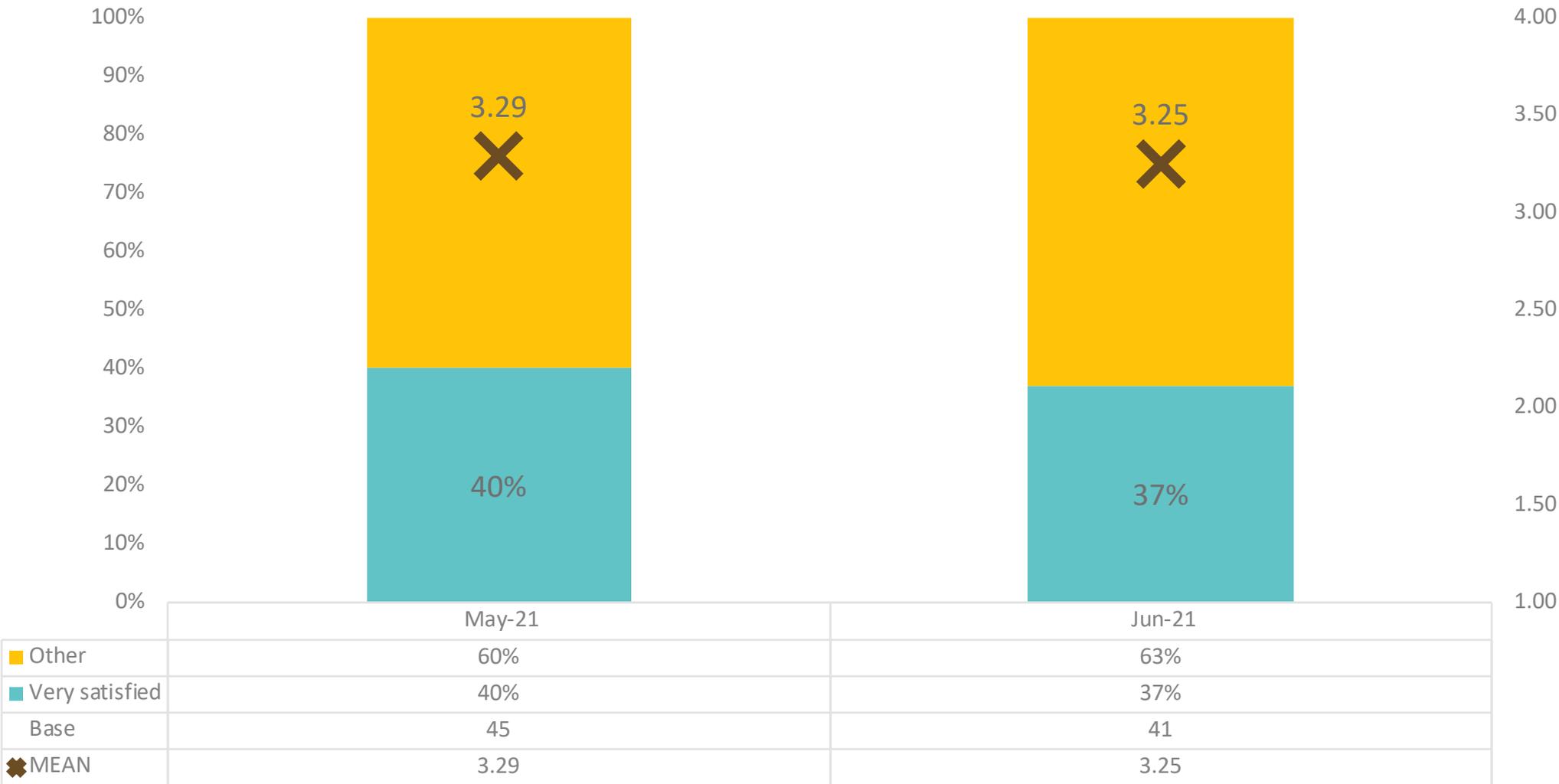


Caution
small
base



OVERALL VALUE – SATISFACTION

4PT RATING SCALE



Caution
small
base



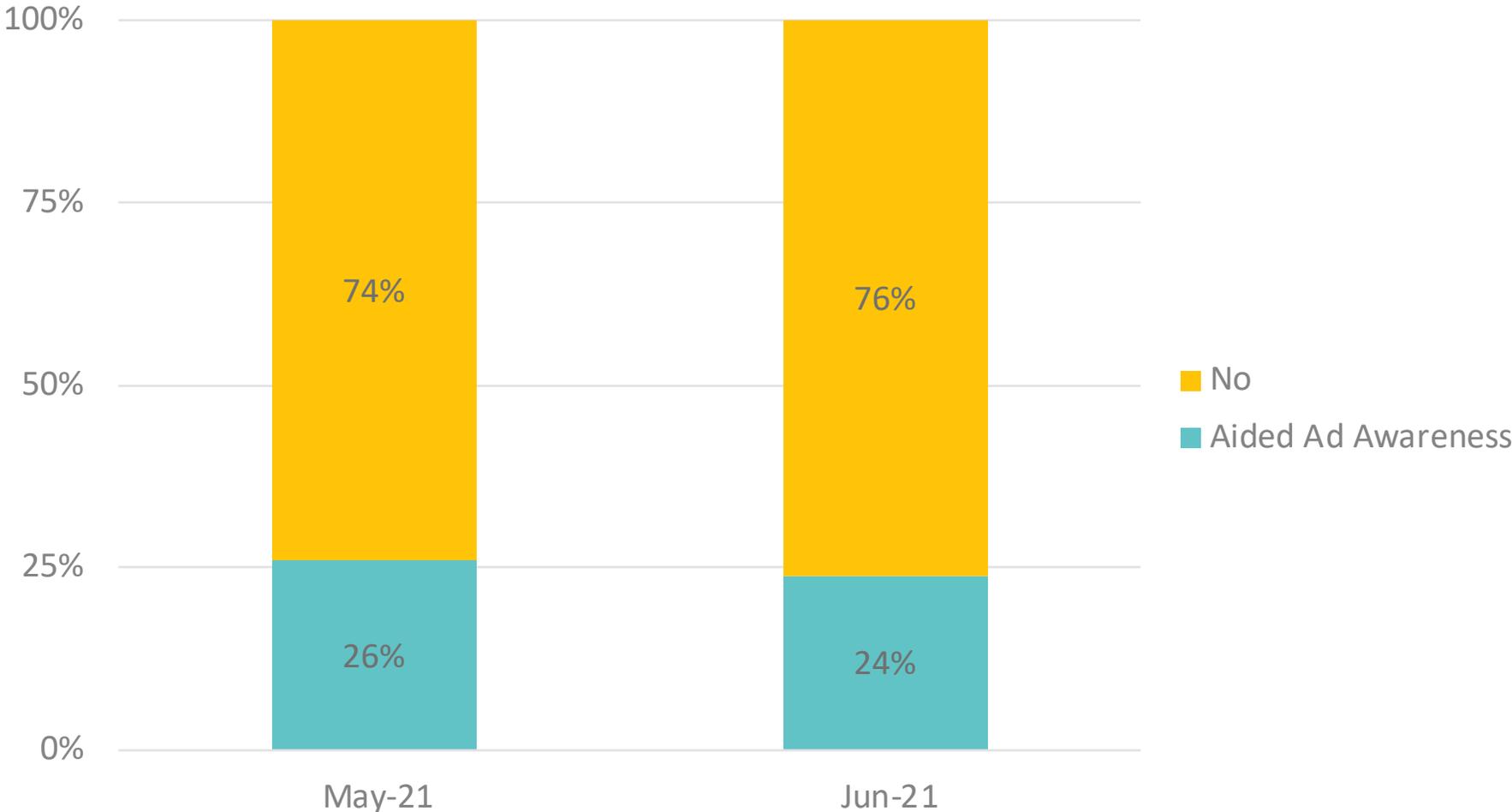


SECTION 4

MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM

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



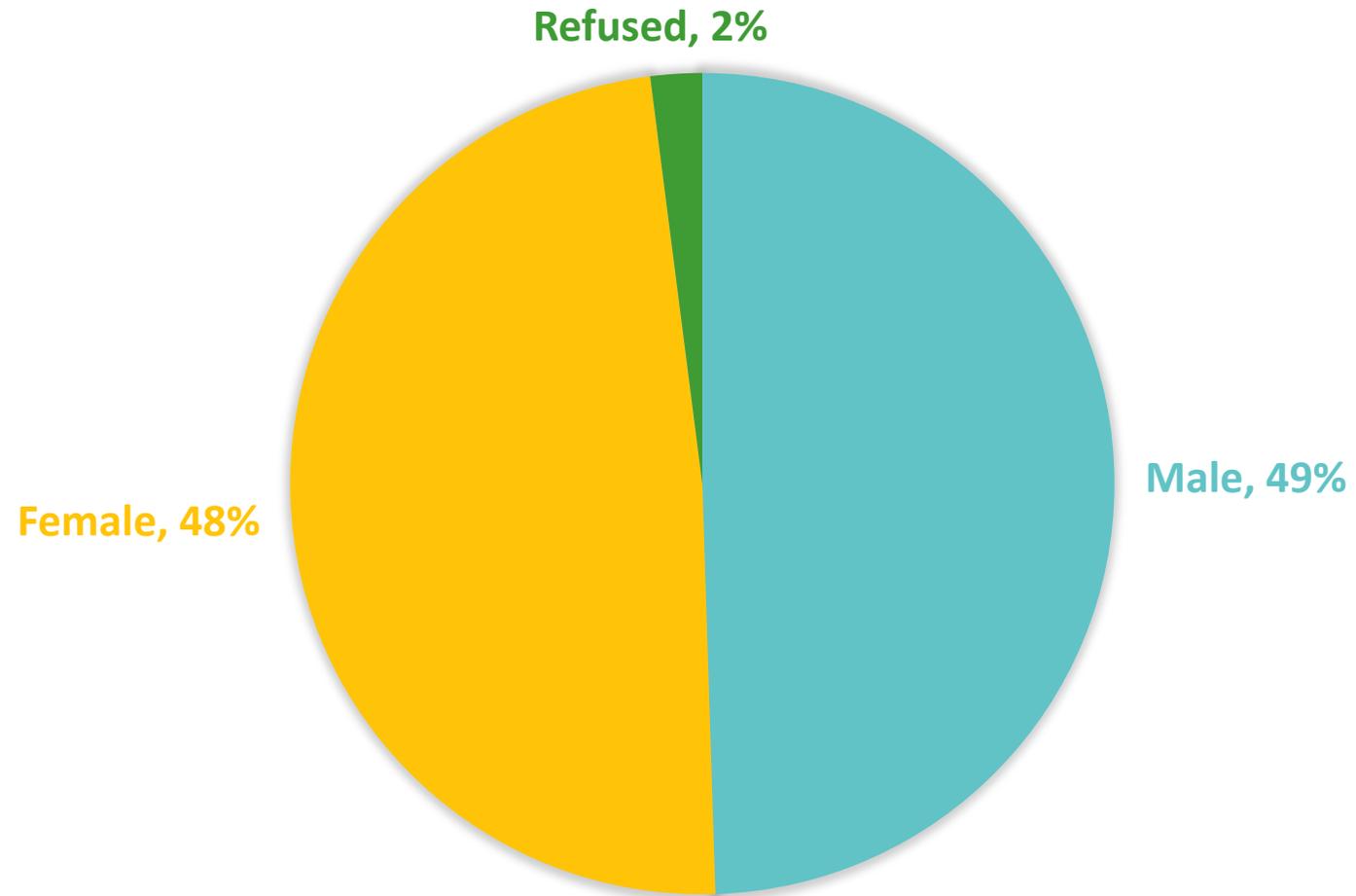


SECTION 5

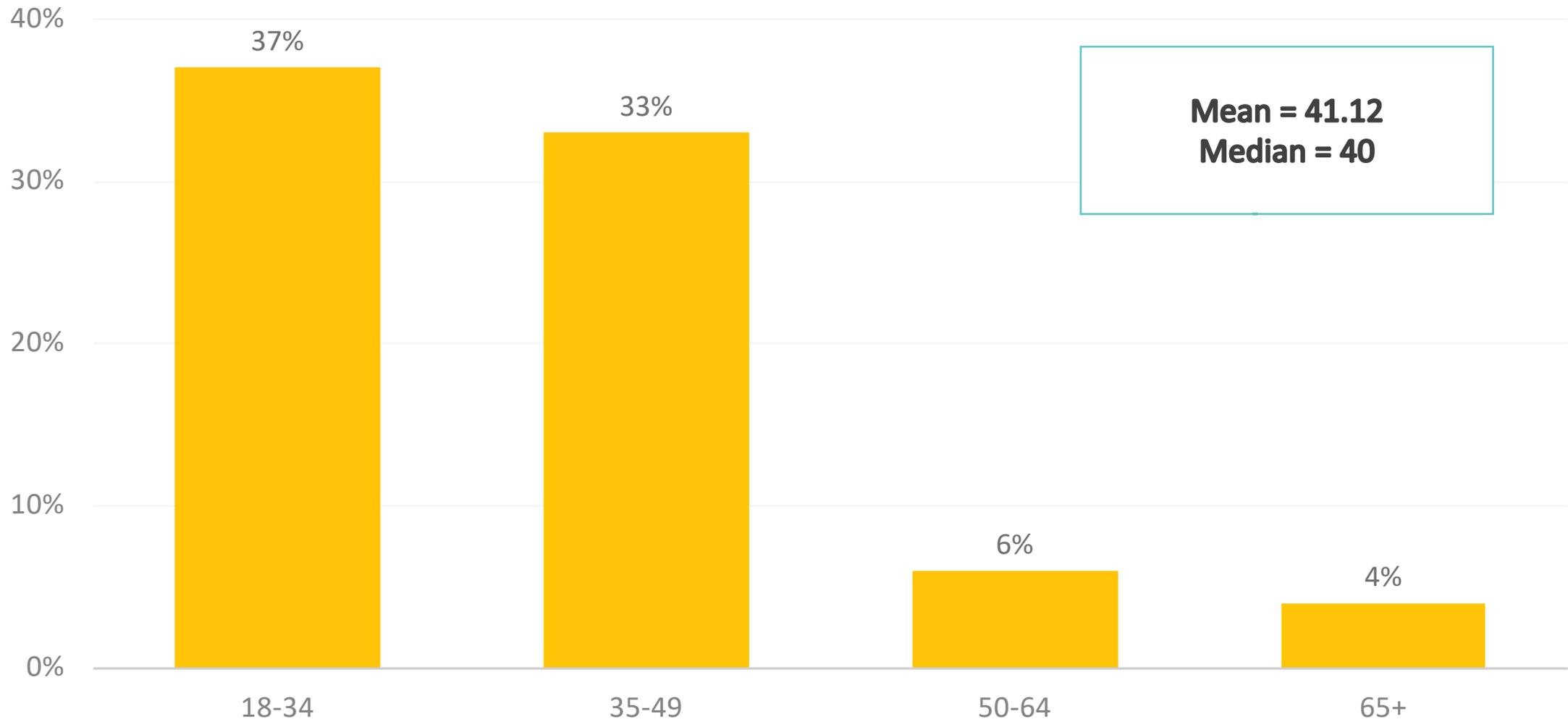
PROFILE OF RESPONDENTS



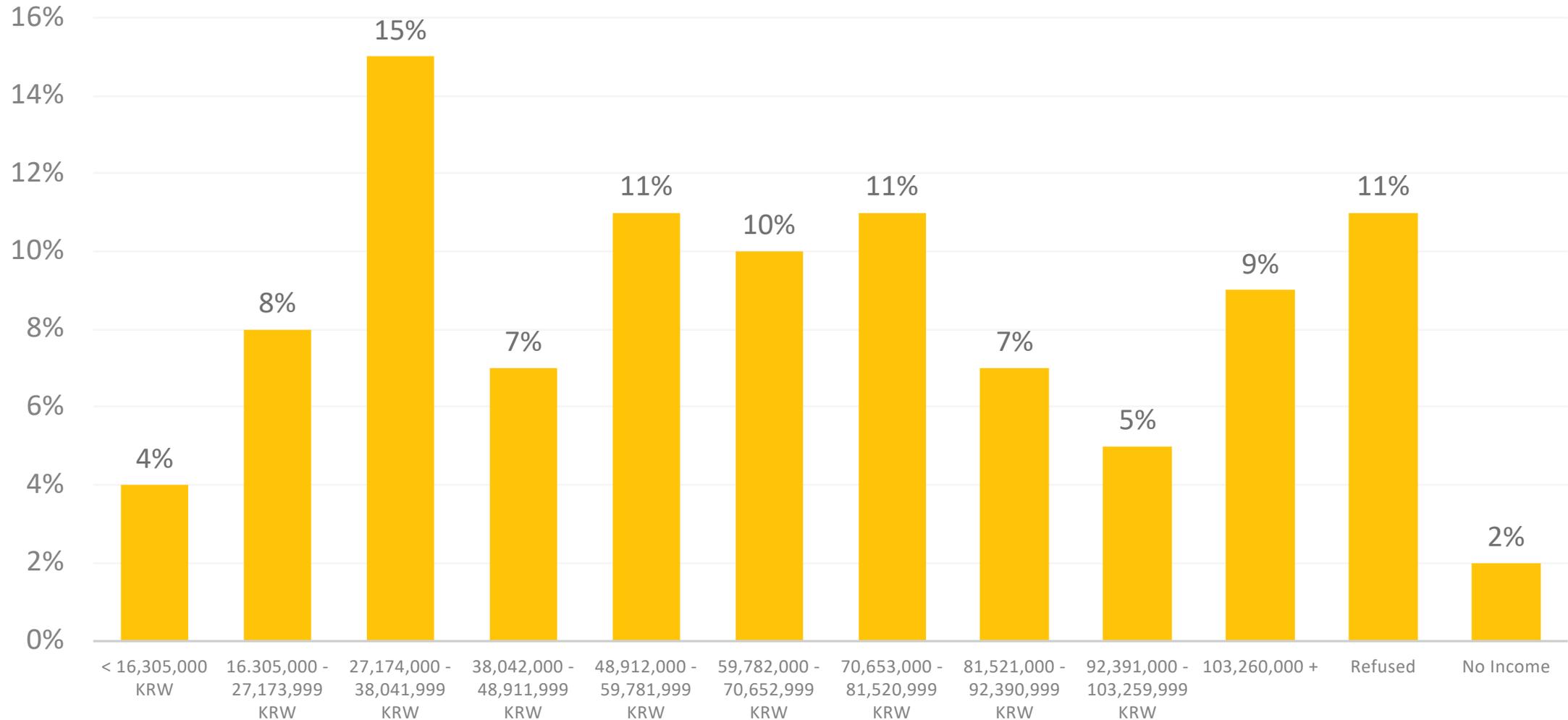
GENDER



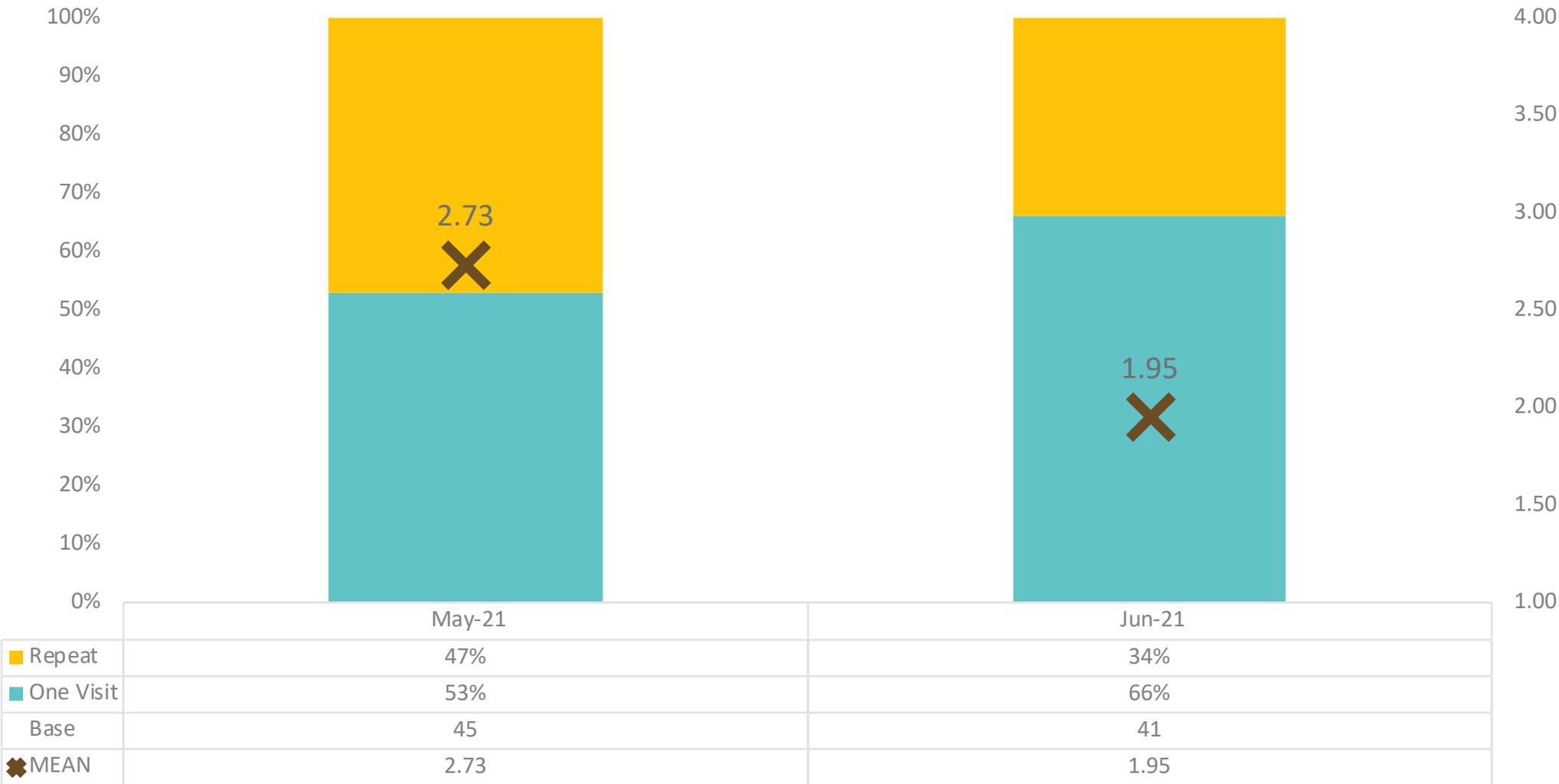
AGE



HOUSEHOLD INCOME



TRIPS TO GUAM



Caution
small
base

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



INTERNATIONAL TRAVEL – Trips in last five years

