



Guam Visitors Bureau

Taiwan In-Market Insight Report

MAY 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 April 27, 2021 – May 6, 2021. A total of 303 surveys were collected during this period.
- The margin of error for a sample of 303 is +/- 5.63 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 +/- 5.63 percentage points.



Key Highlights

- Half (52%) of those polled do not intend to travel internationally until the pandemic is over.
- Nearly 1 in 4 (23%) are considering Guam as a possible destination for a future vacation, second only to Japan at 71% and tied with Korea (23%).
- Of those who said they would consider Guam as a possible future travel destination, 46% indicate they intend to vacation outside of Taiwan in the next 12 months, with an additional 25% indicating that they would travel in 1-2 years. More than a quarter (28%) indicate they would not travel until the pandemic ends.
- “Safety is an important factor when traveling internationally” was identified by 72% of respondents as a very important factor in choosing a destination, by far the most selected item tested.



Key Highlights (cont.)

- While only 7% had reported receiving at least one shot of the COVID-19 vaccine, 67% of respondents will get the vaccine when available to them. A quarter (25%) indicate they will not get vaccinated.
- Half (51%) of respondents indicate they will likely travel less often after the pandemic; only 22% will travel more often.
- The factors that most selected as very important when selecting a destination to visit post-COVID are low rates of COVID-19 (81%) and advanced hygiene measures (60%).
- The majority of likely travelers in Taiwan (63%) see Guam's plans for improvements to safety measures at the airport, including a digital/ touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process, as added value and are willing to pay a little more for them.

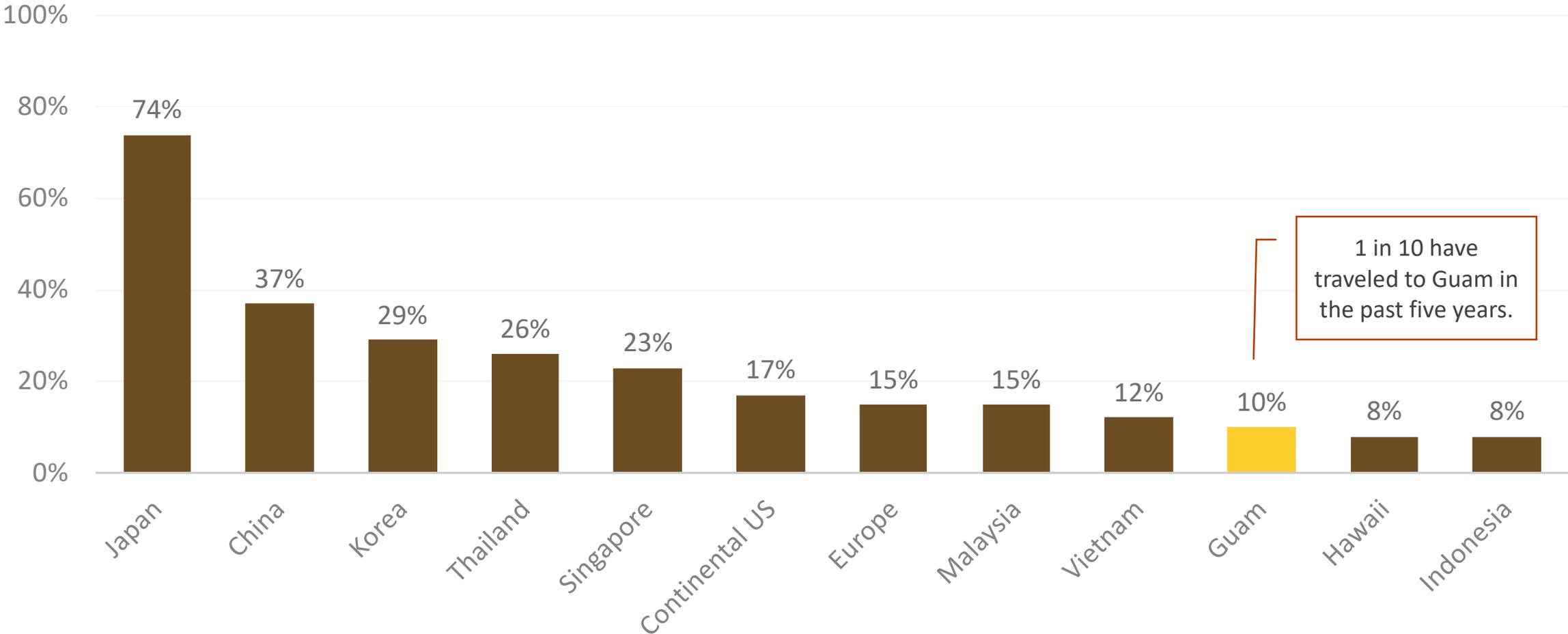




SECTION 1
TRAVEL PLANNING



TRAVEL HISTORY

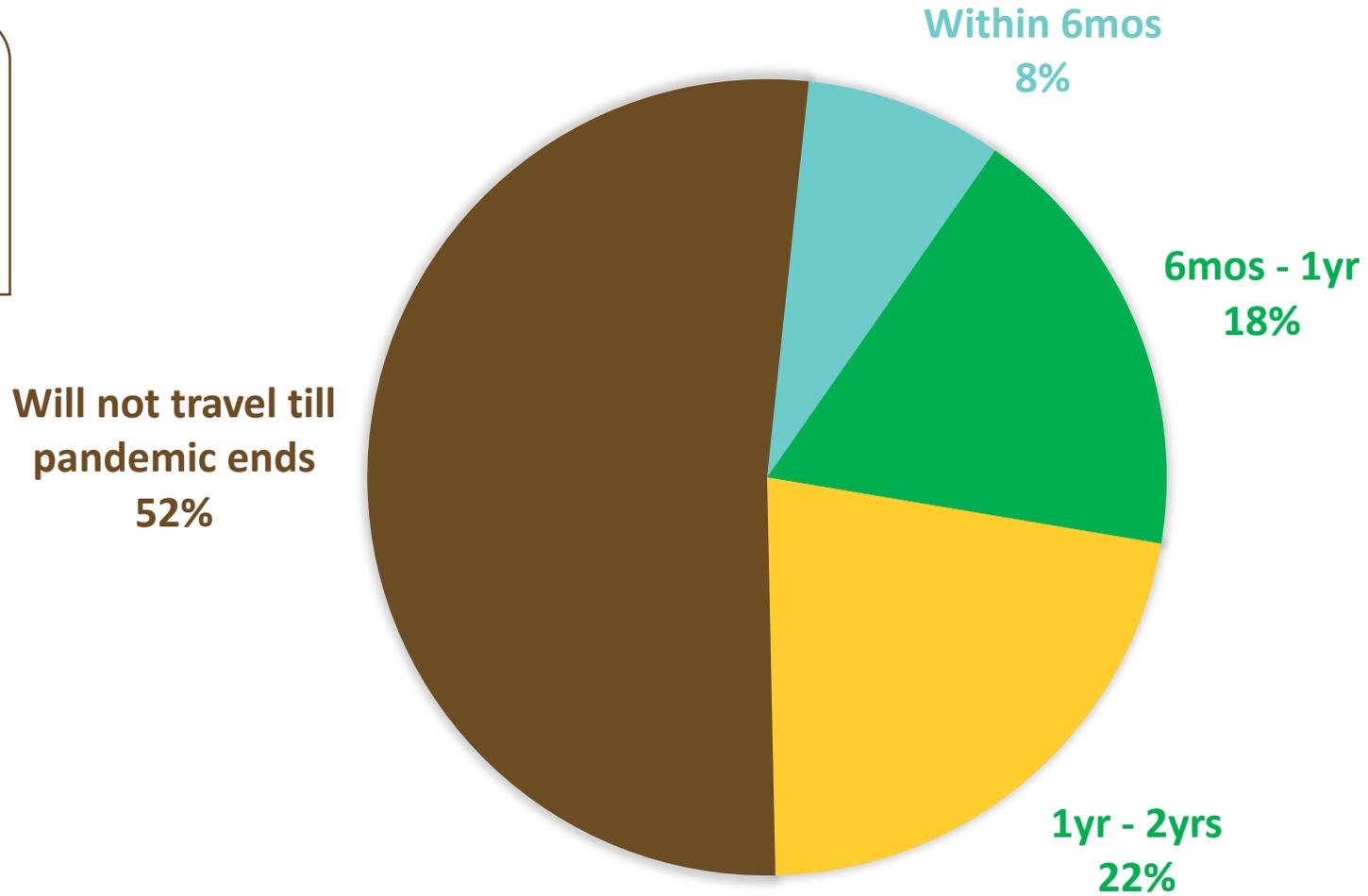


1 in 10 have traveled to Guam in the past five years.

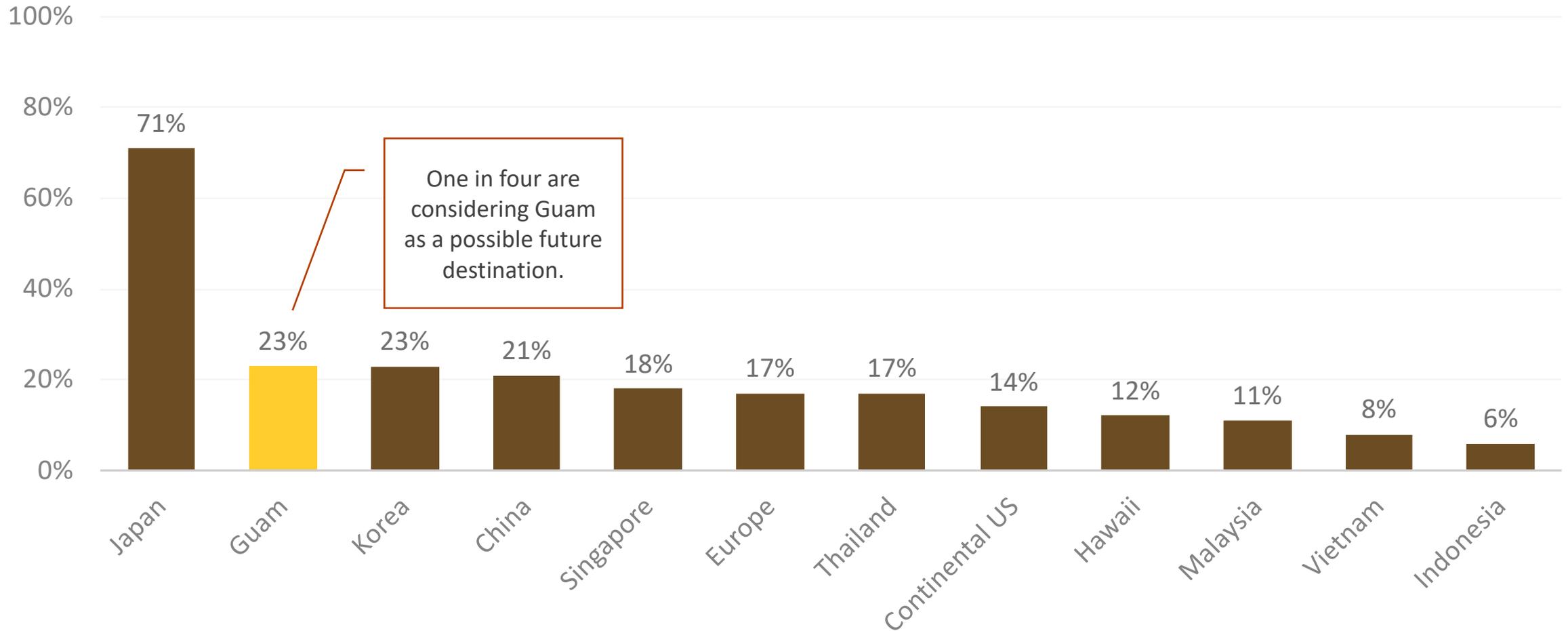


FUTURE TRAVEL PLANS

Half of those polled do not intend to travel internationally until the pandemic is over.

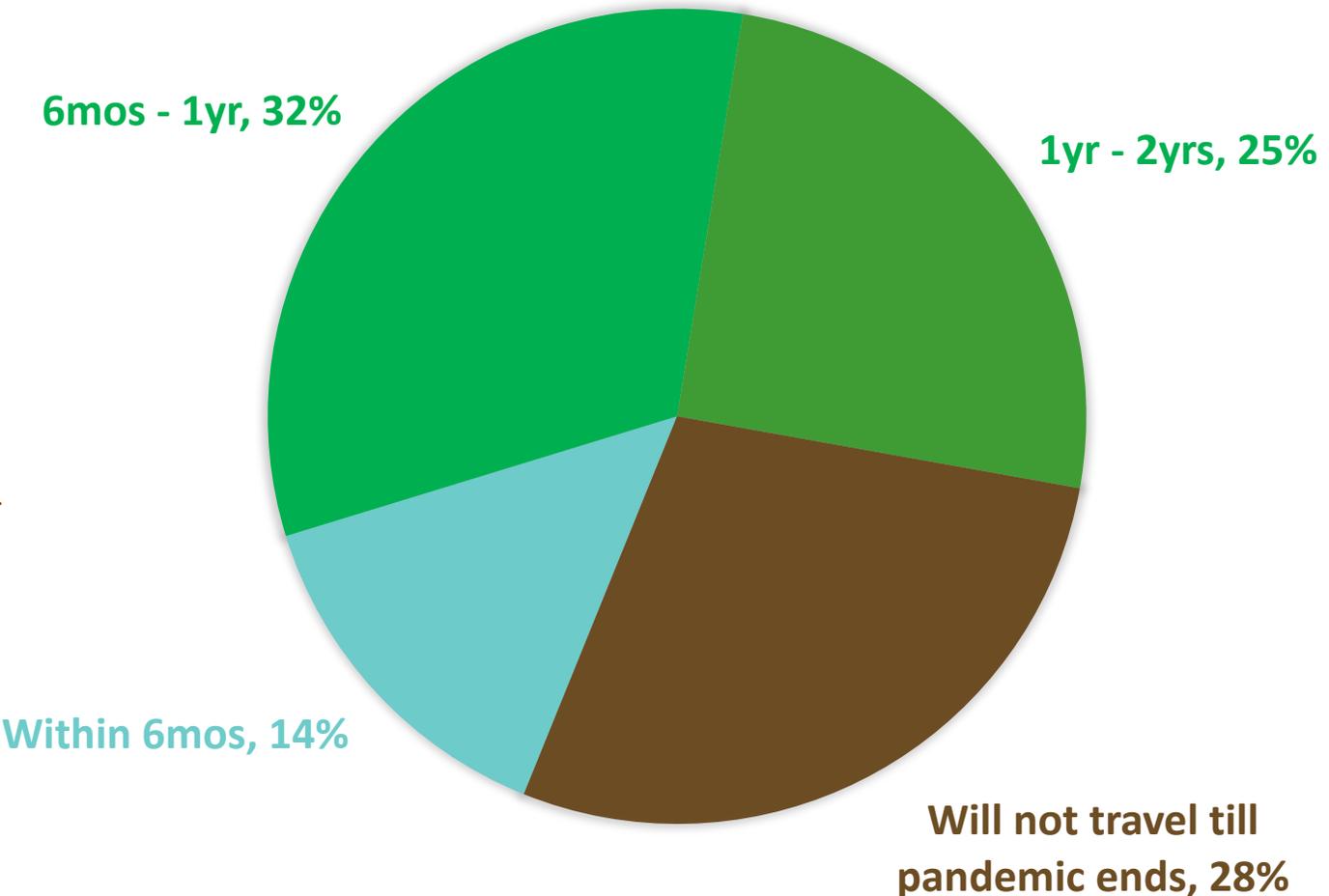


POTENTIAL FUTURE TRAVEL DESTINATIONS



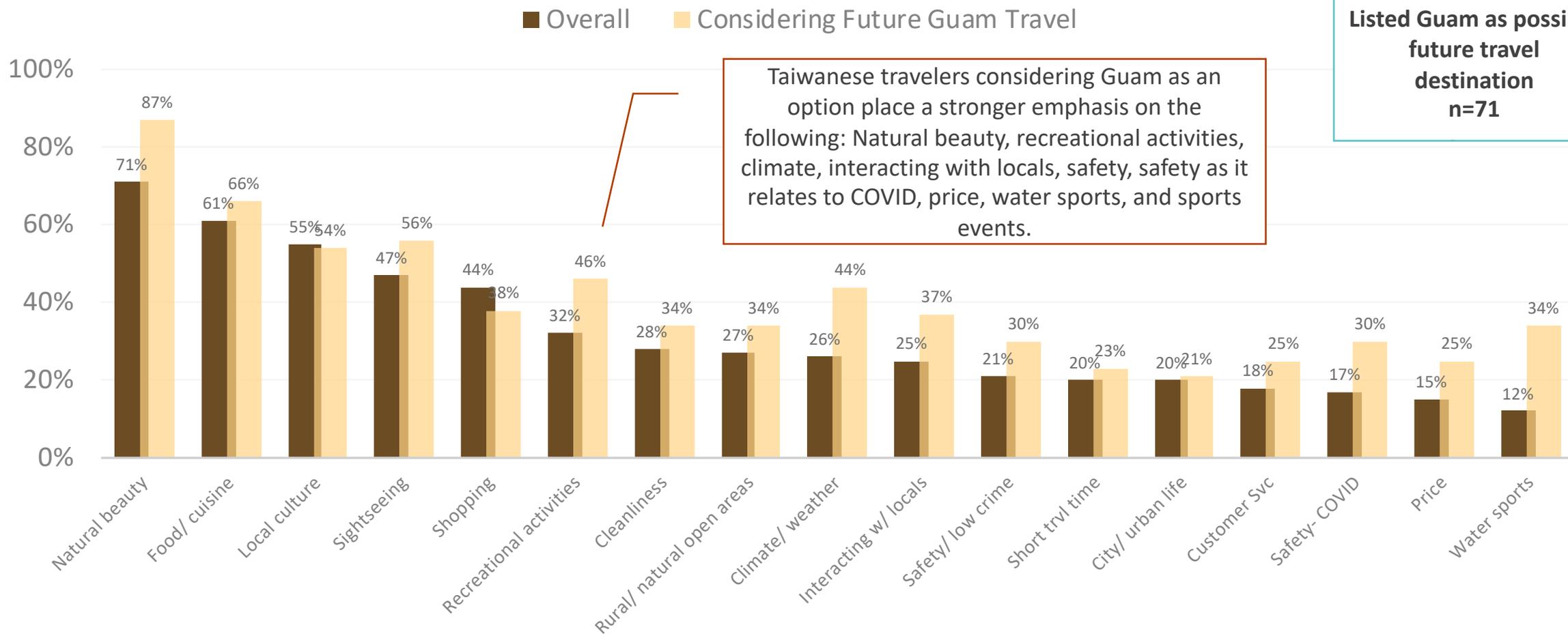
TIMING OF FUTURE TRAVEL TO GUAM

Nearly half who are considering Guam as a possible future destination intends to travel internationally within the next year.



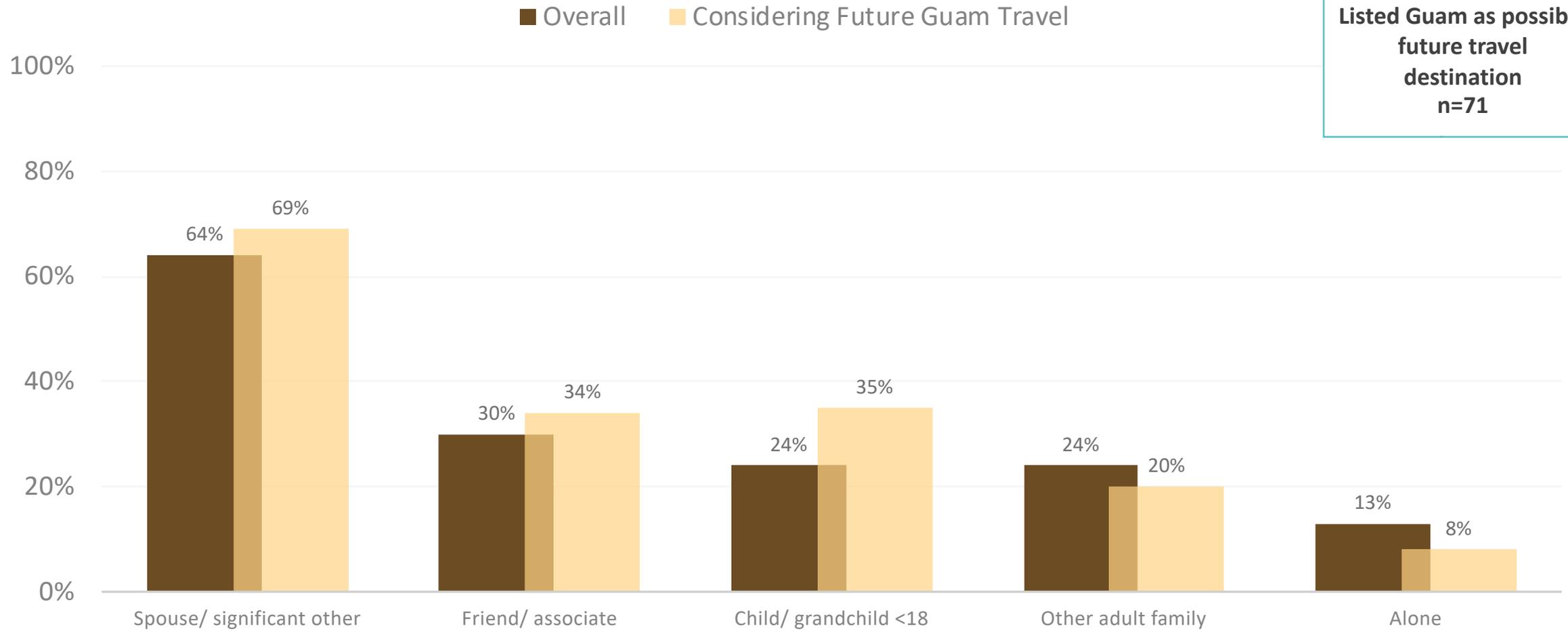
Filter:
Listed Guam as possible future travel destination
n=71

APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



FUTURE INTERNATIONAL TRAVEL PARTY

Filter:
Listed Guam as possible
future travel
destination
n=71



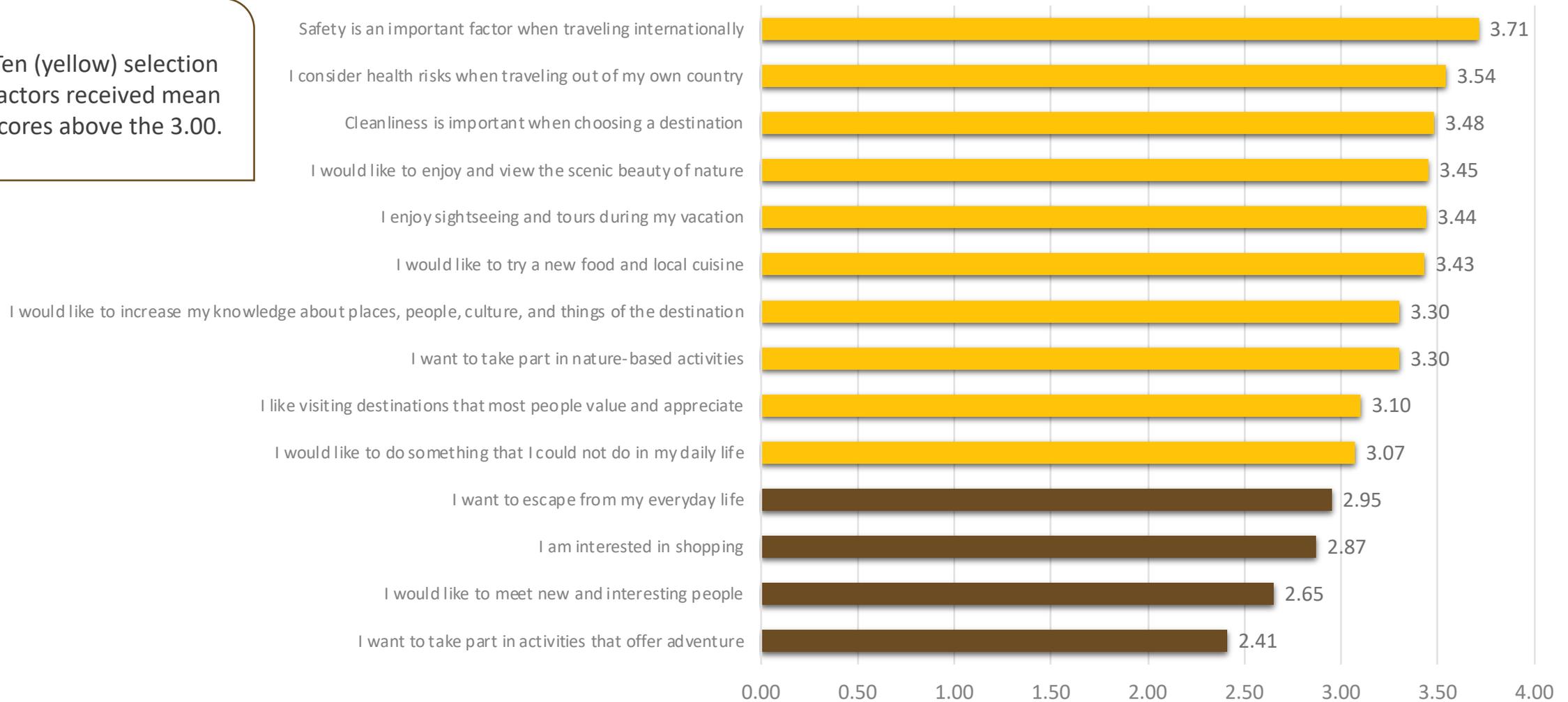
Q: Thinking of your travel plans post-COVID-19, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

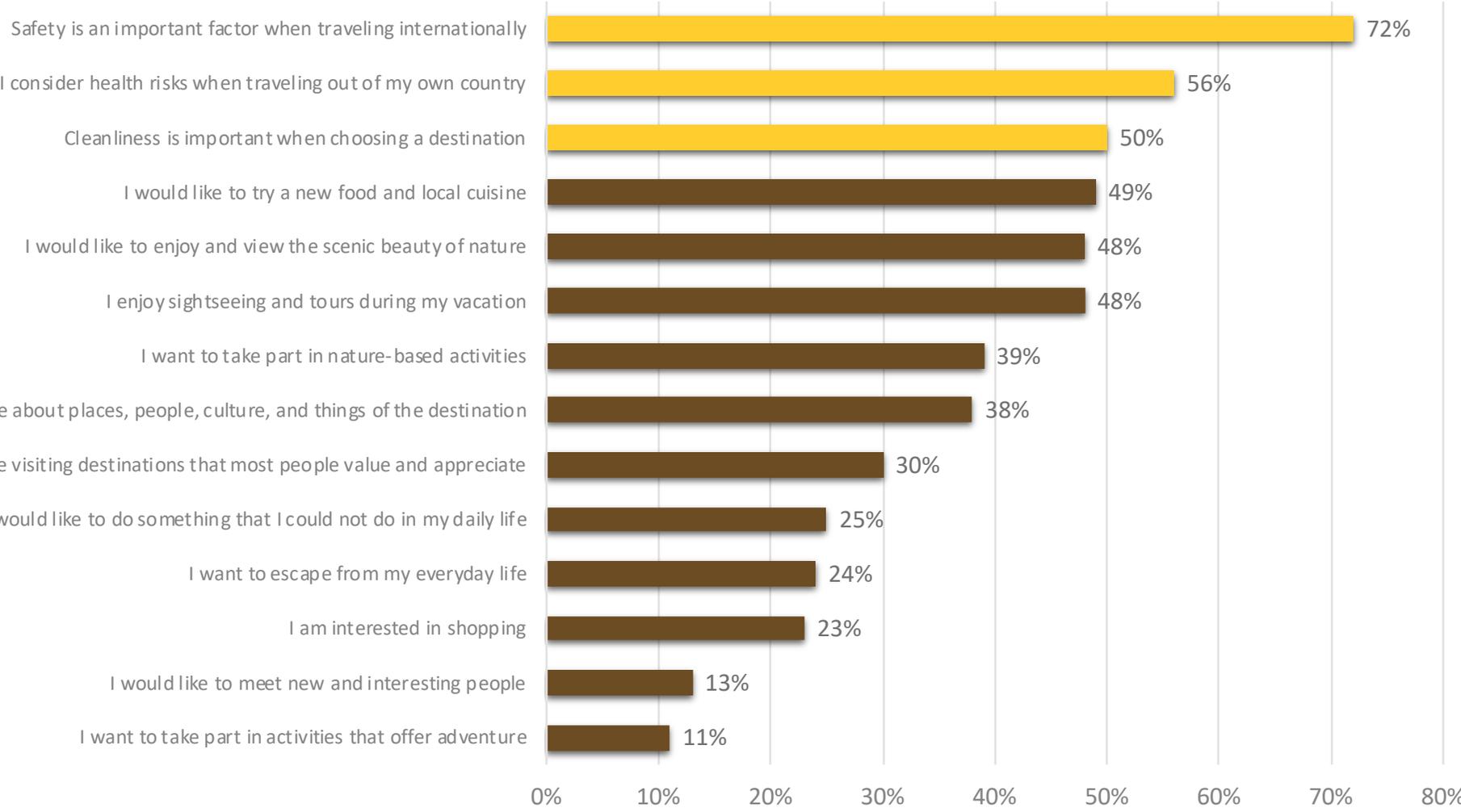
MEAN SCORE 4PT SCALE

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

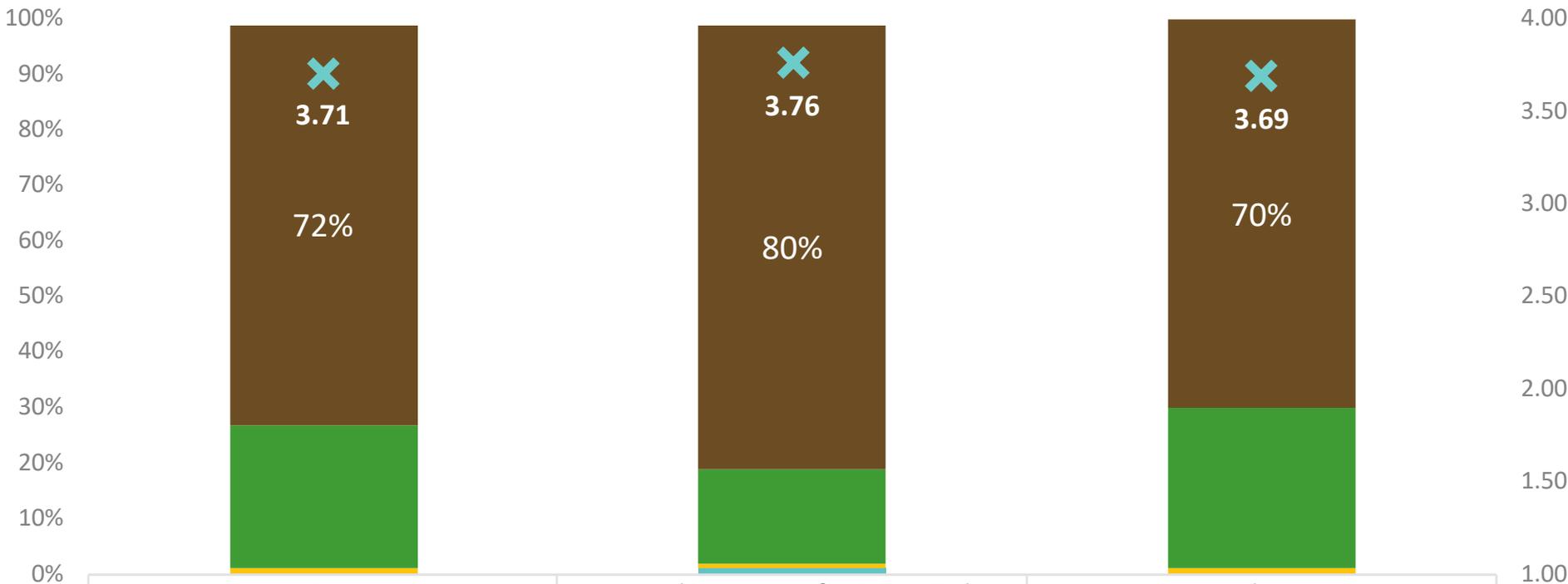


DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

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



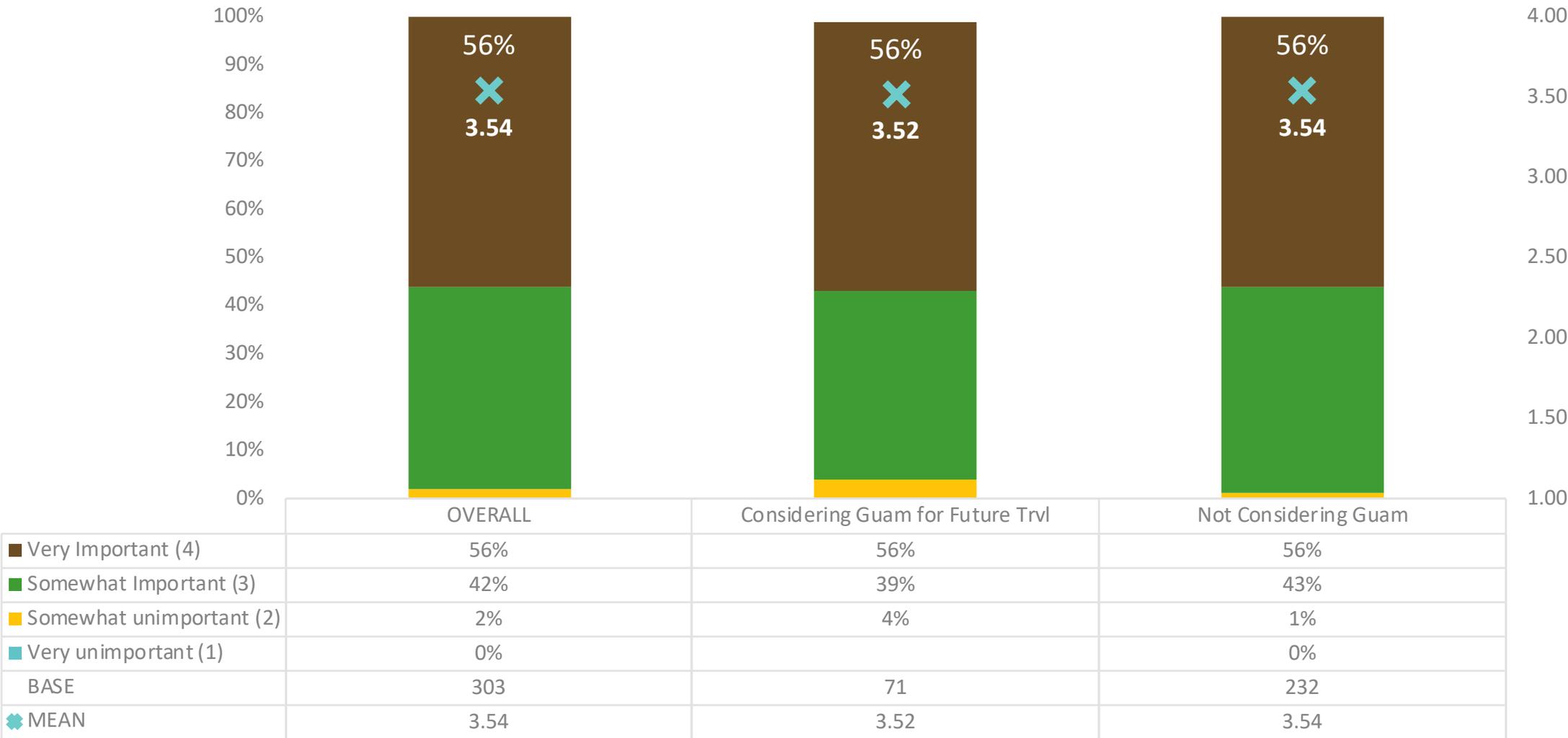
Safety is an important factor when traveling internationally



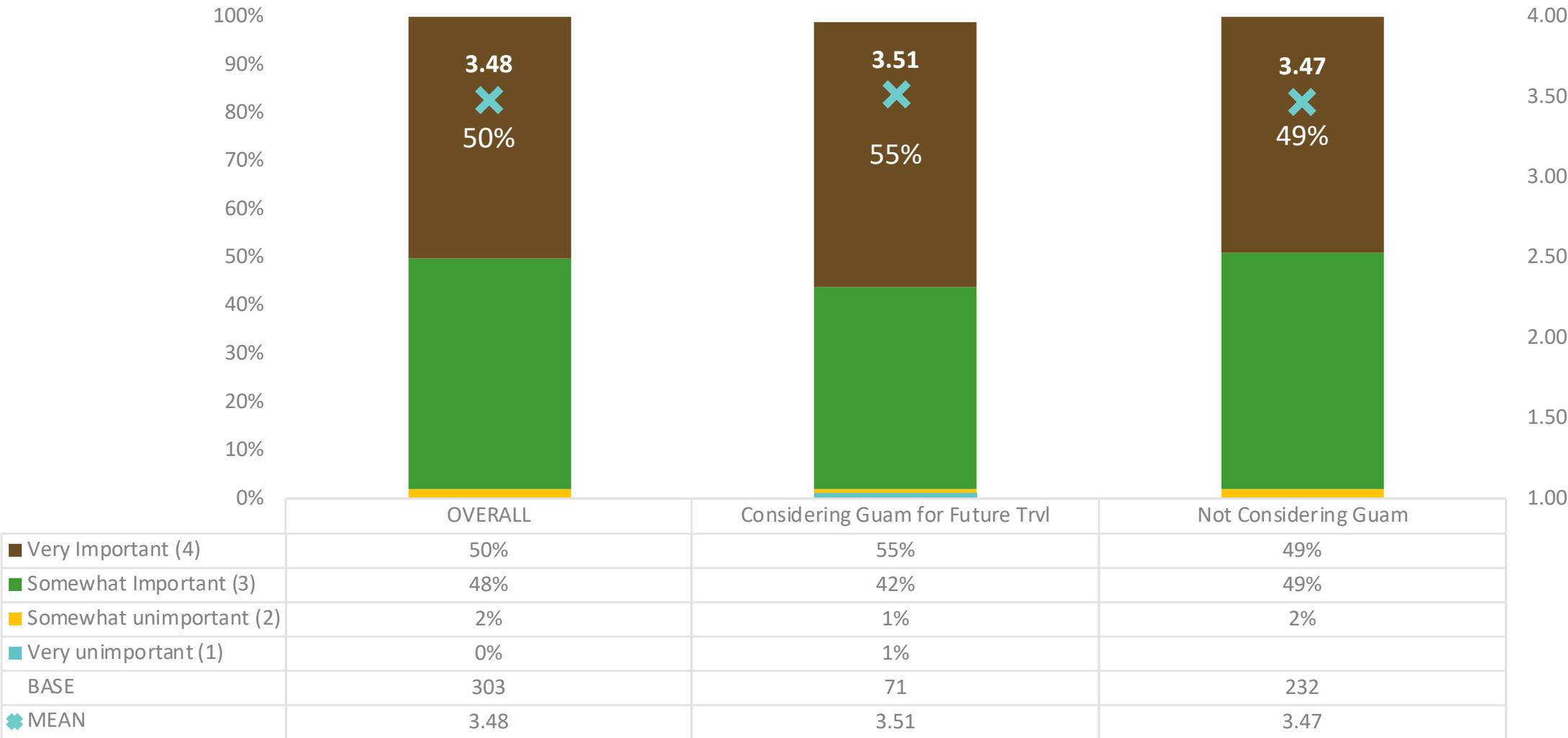
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	72%	80%	70%
Somewhat Important (3)	26%	17%	29%
Somewhat unimportant (2)	1%	1%	1%
Very unimportant (1)	0%	1%	
BASE	303	71	232
MEAN	3.71	3.76	3.69



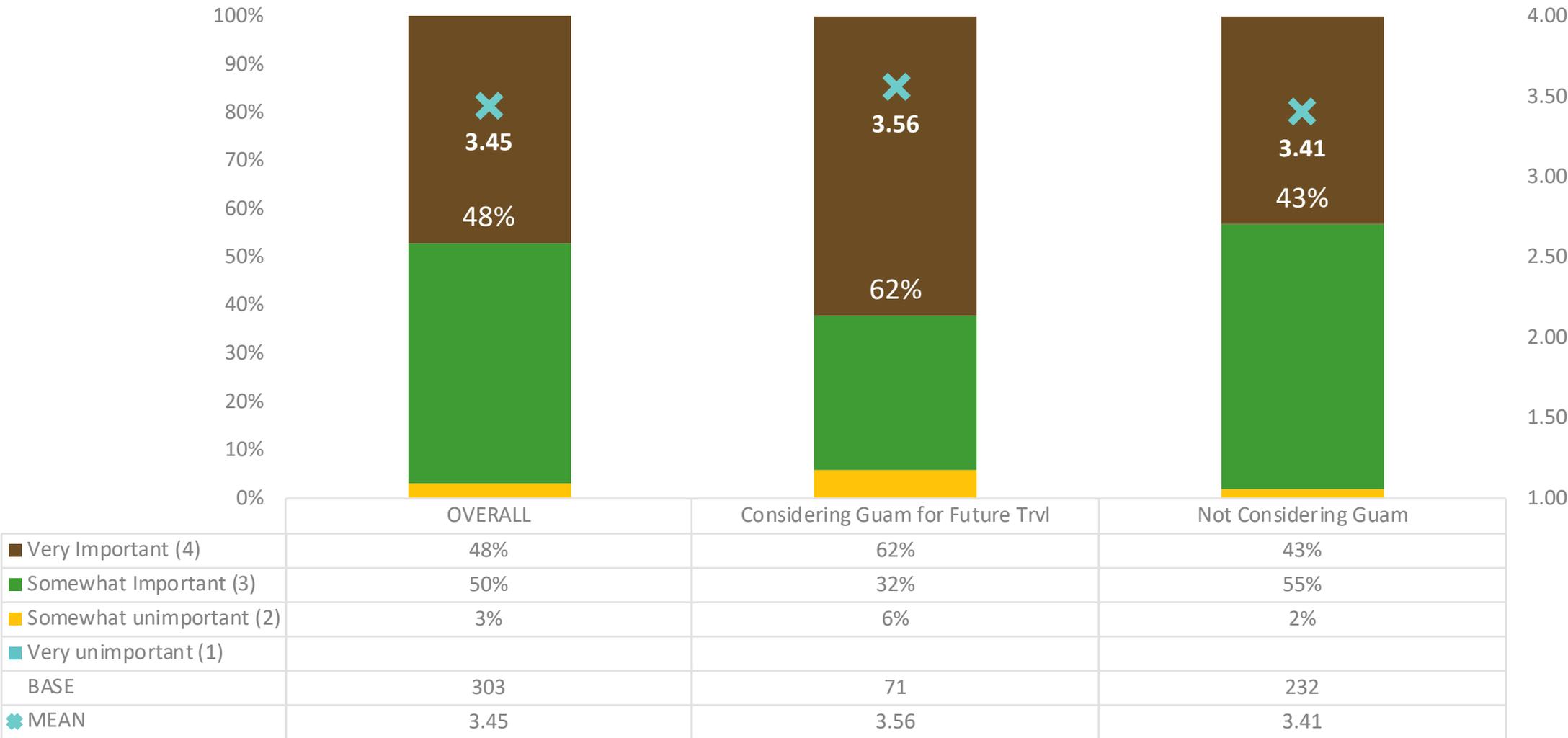
I consider health risks when traveling out of my own country



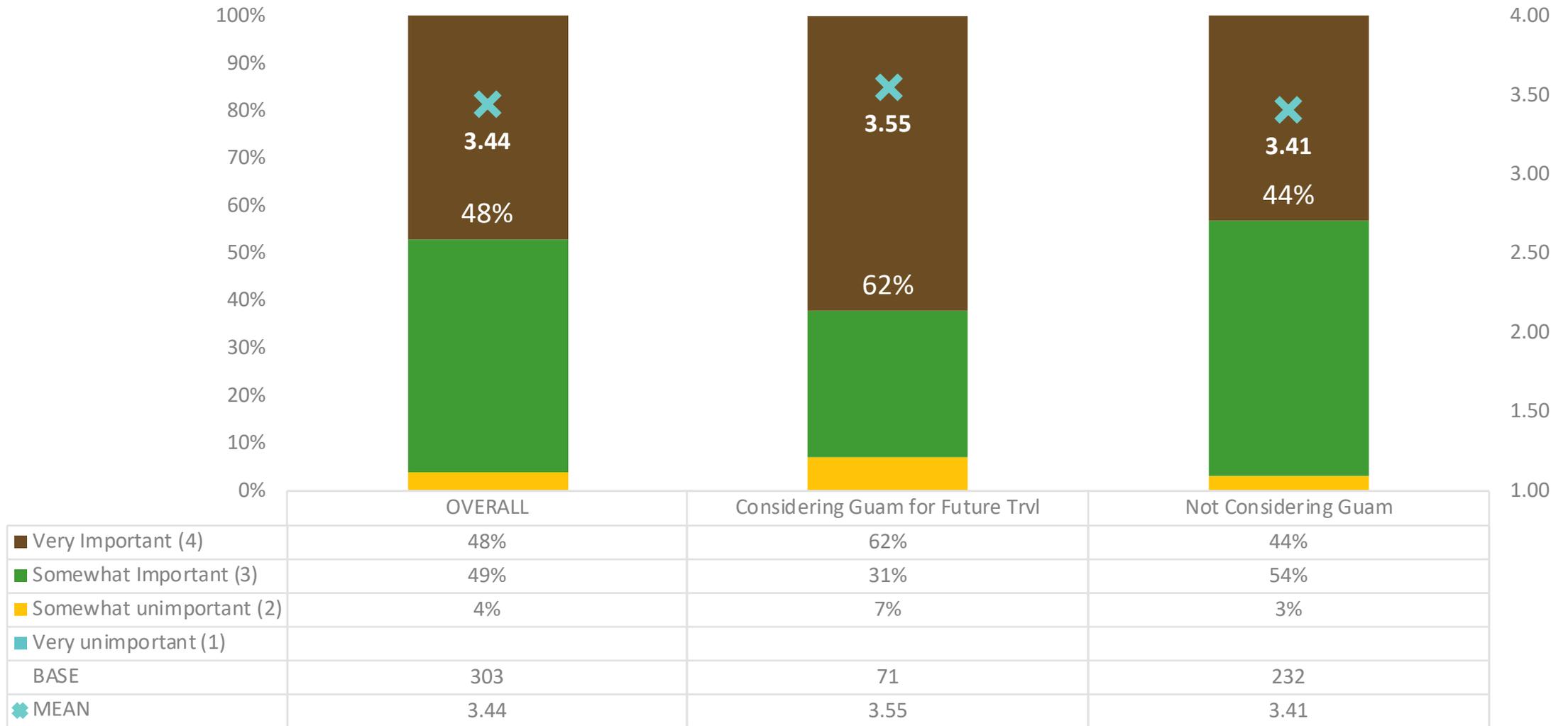
Cleanliness is important when choosing a destination



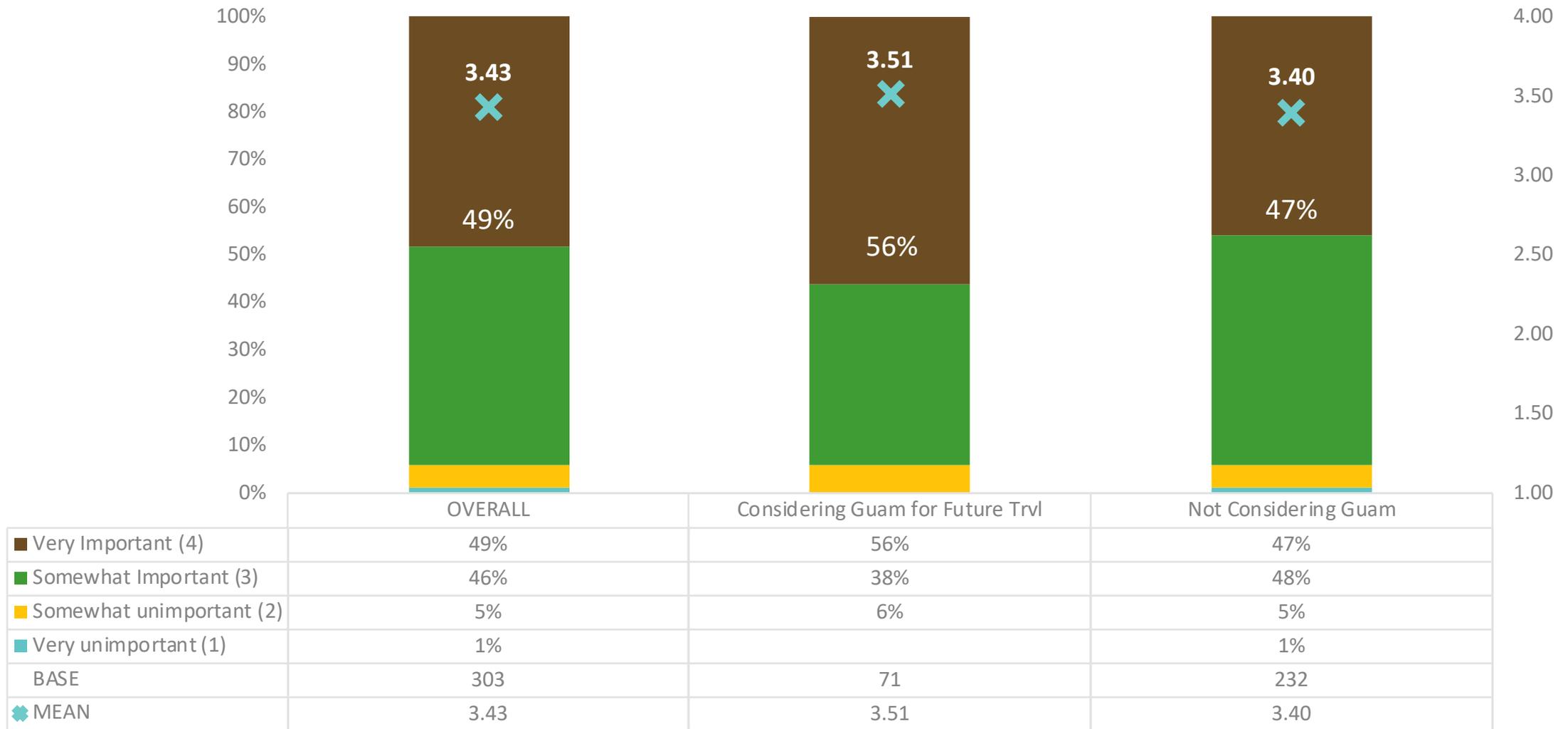
I would like to enjoy and view the scenic beauty of nature



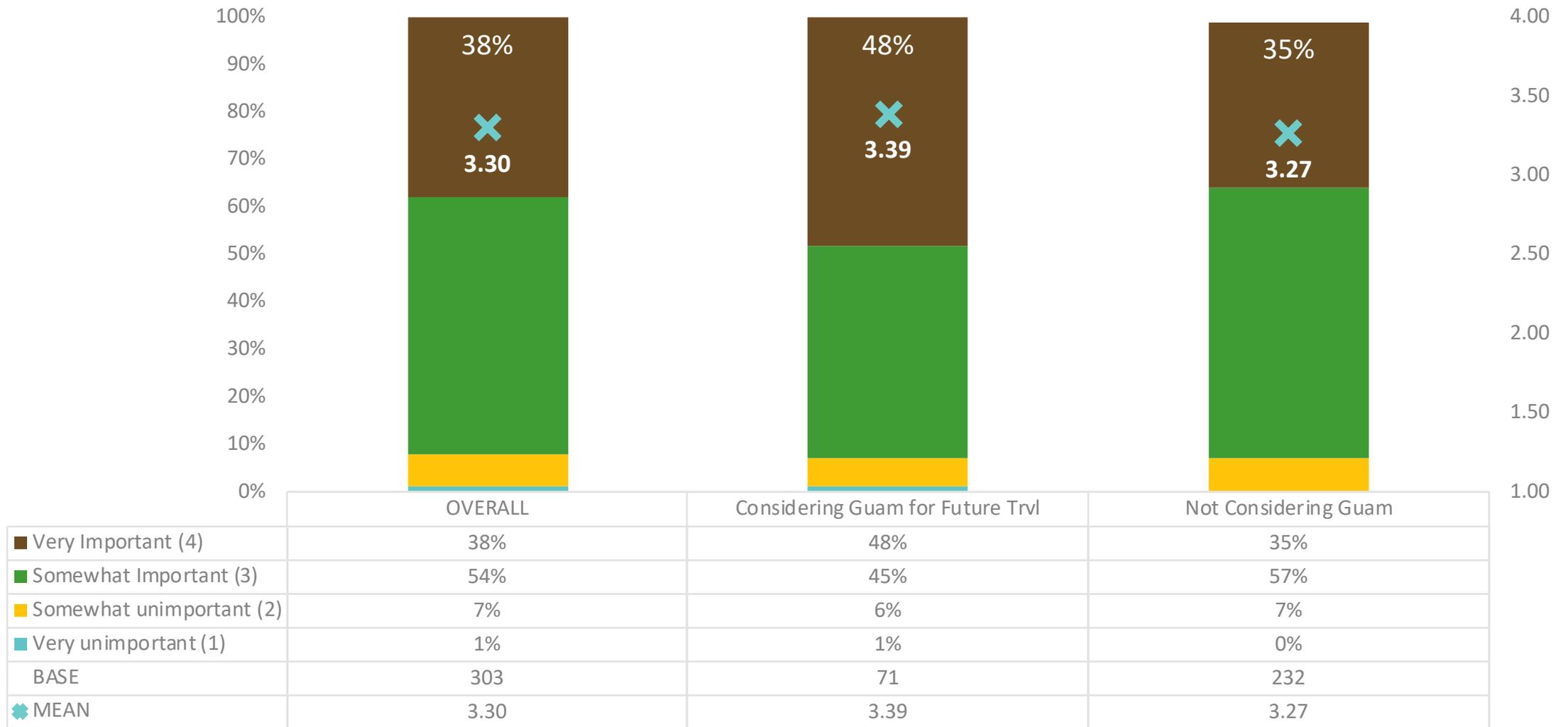
I enjoy sightseeing and tours during my vacation



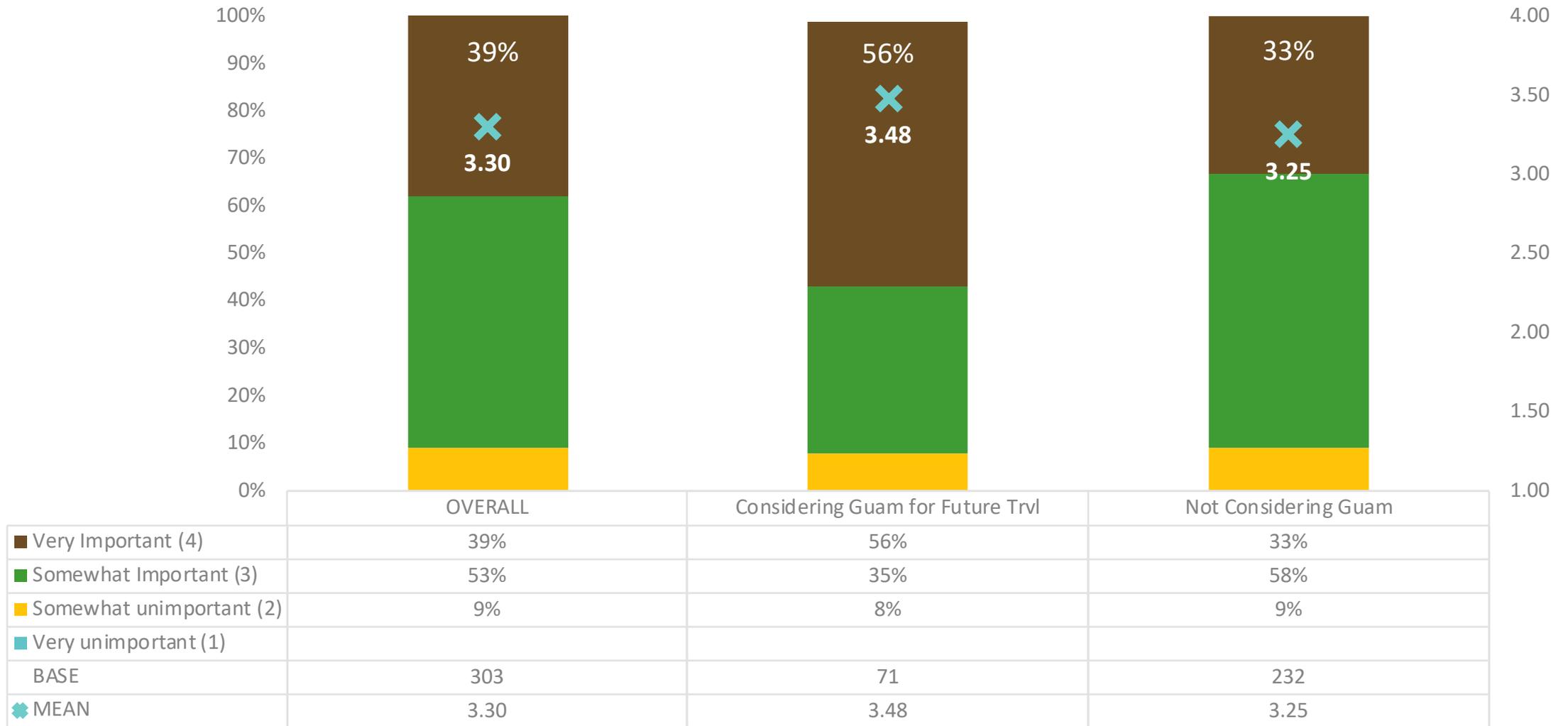
I would like to try a new food and local cuisine



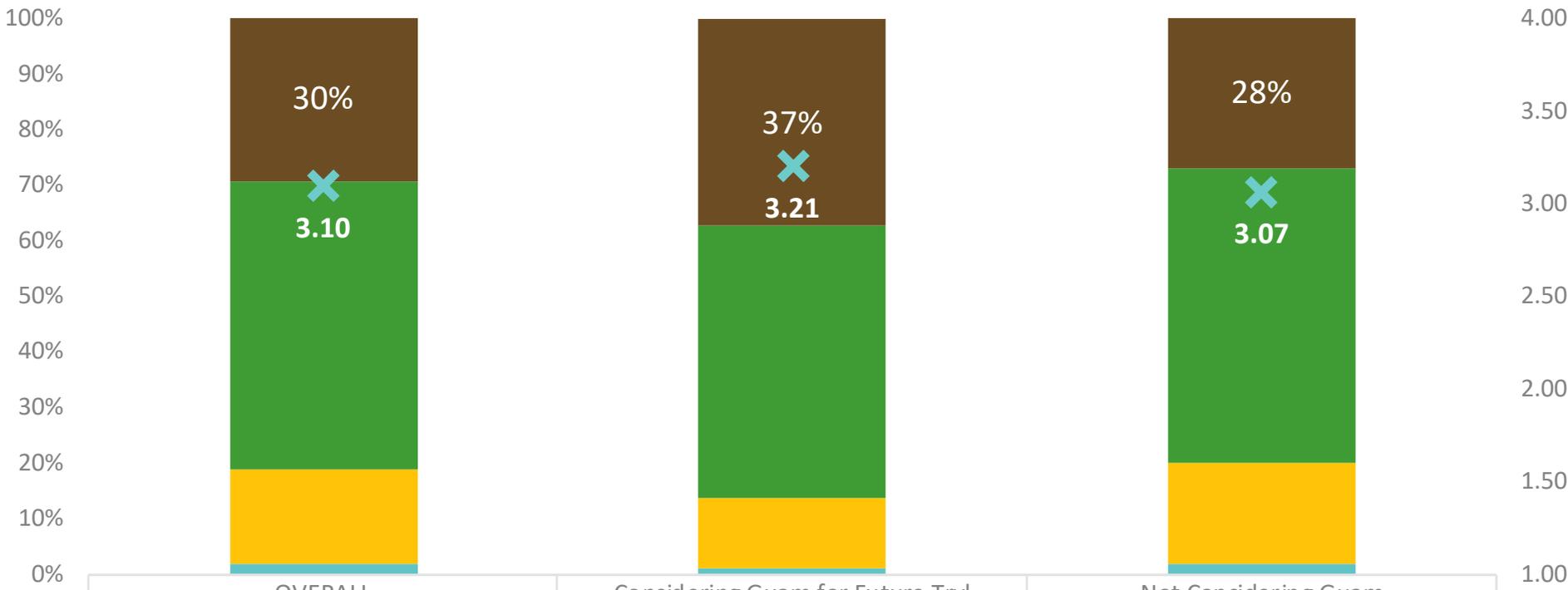
I would like to increase my knowledge about places, people, culture, and things of the destination



I want to take part in nature-based activities



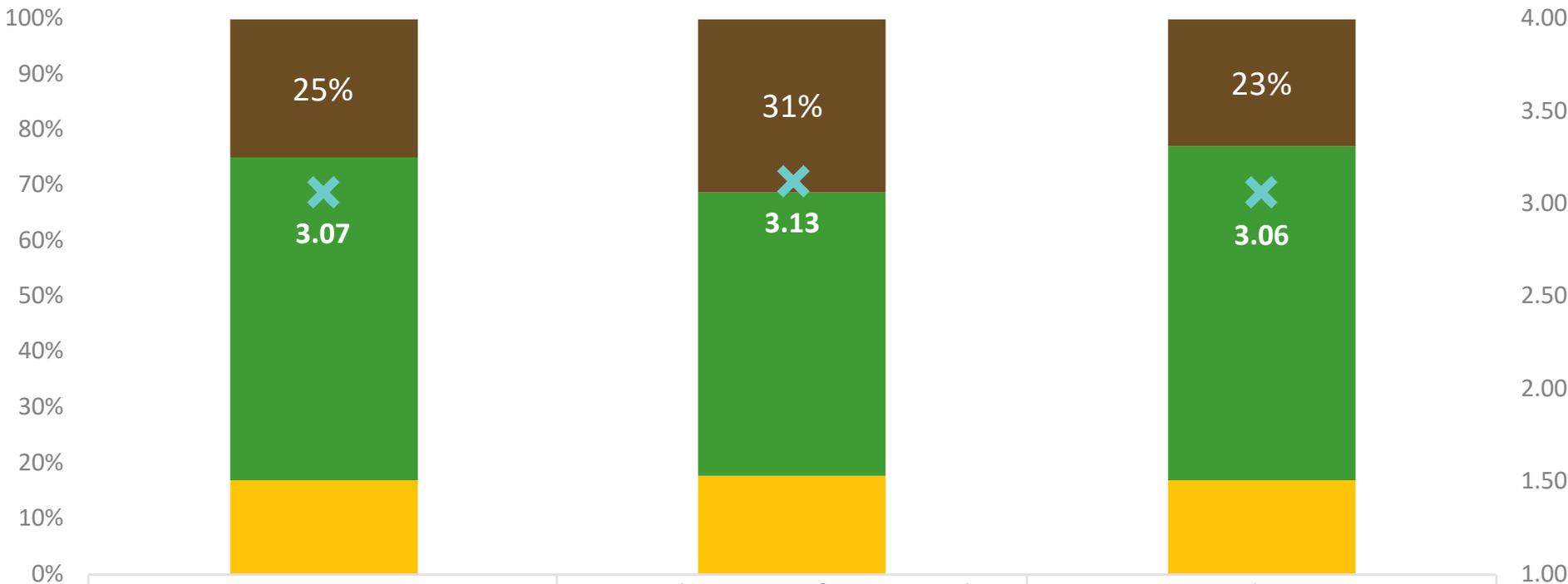
I like visiting destinations that most people value and appreciate



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	30%	37%	28%
Somewhat Important (3)	52%	49%	53%
Somewhat unimportant (2)	17%	13%	18%
Very unimportant (1)	2%	1%	2%
BASE	303	71	232
MEAN	3.10	3.21	3.07



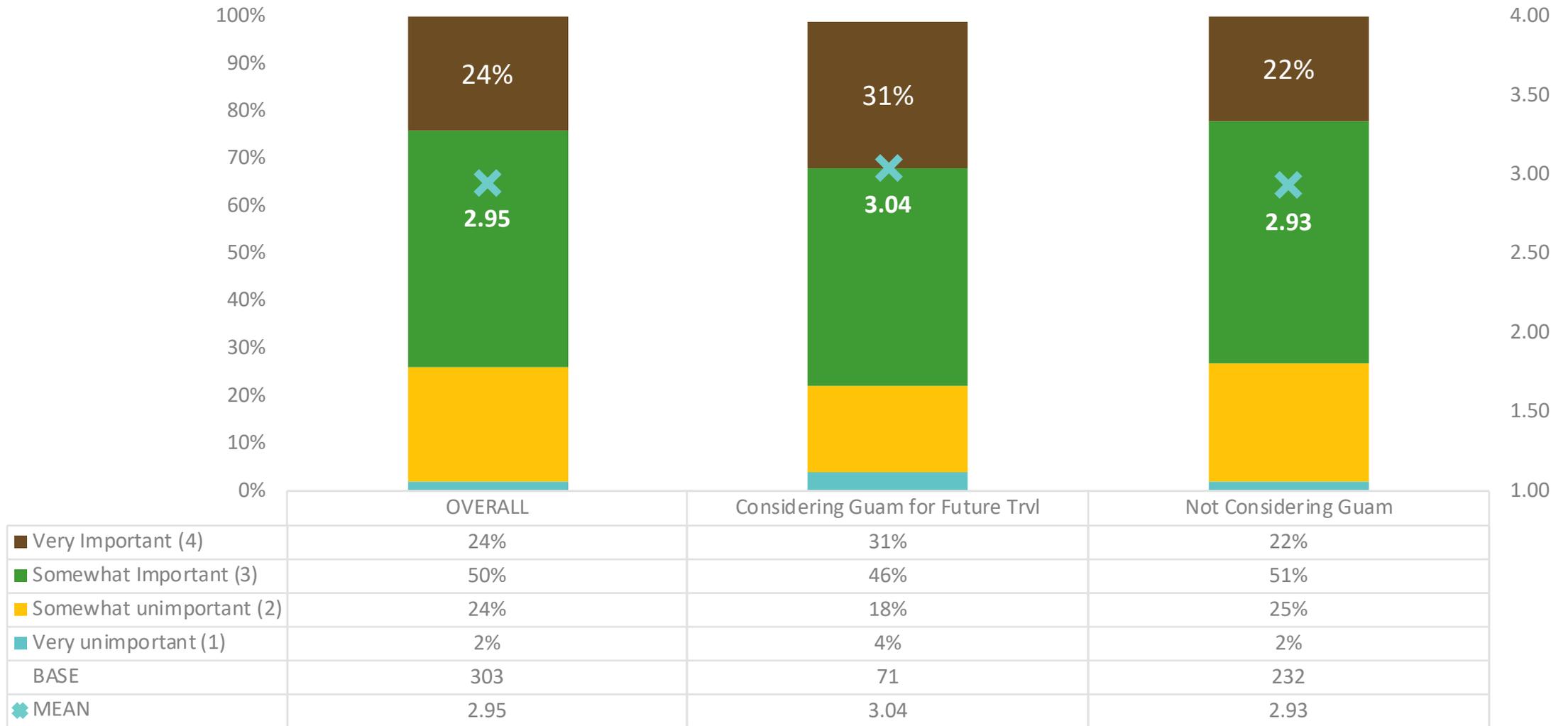
I would like to do something that I could not do in my daily life



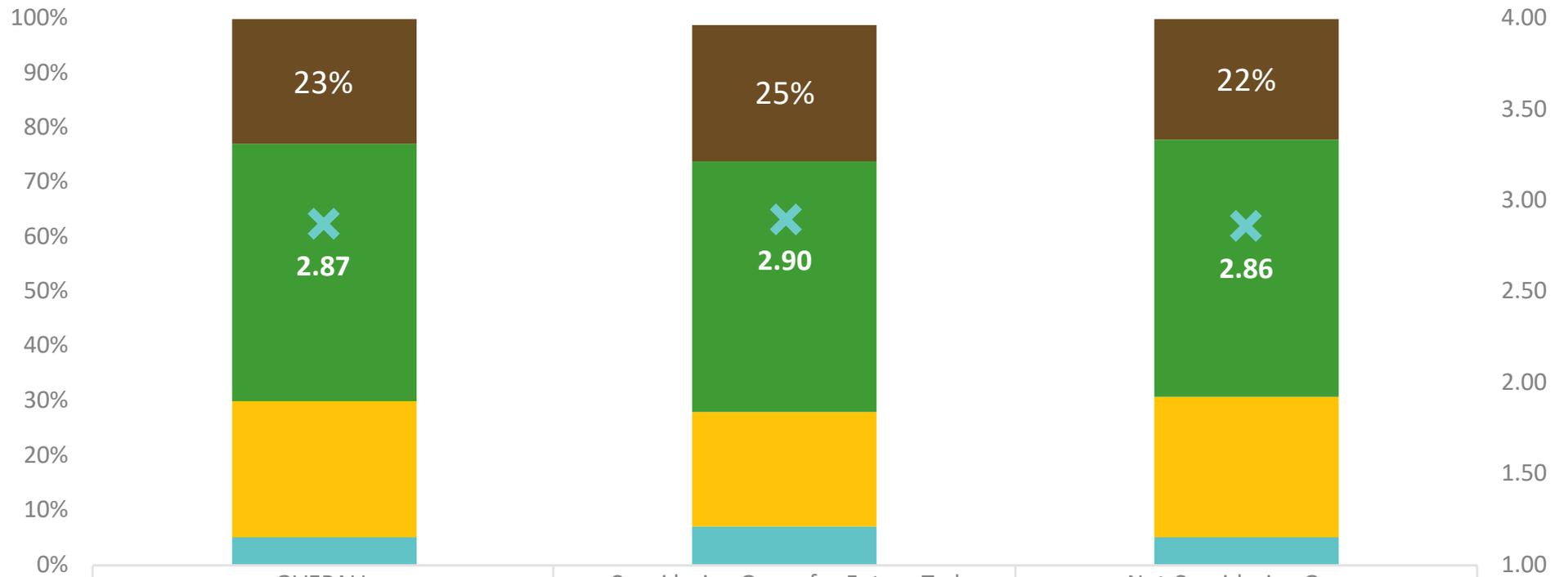
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	25%	31%	23%
Somewhat Important (3)	58%	51%	60%
Somewhat unimportant (2)	17%	18%	17%
Very unimportant (1)			
BASE	303	71	232
MEAN	3.07	3.13	3.06



I want to escape my everyday life

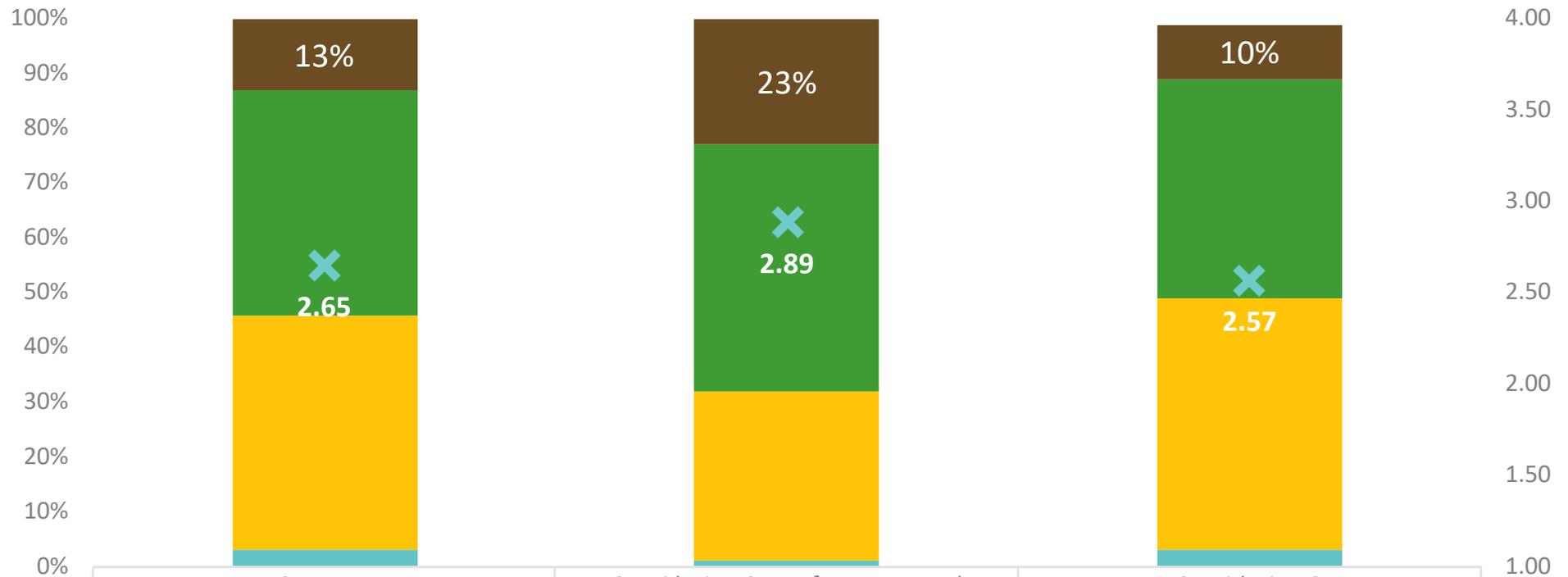


I am interested in shopping



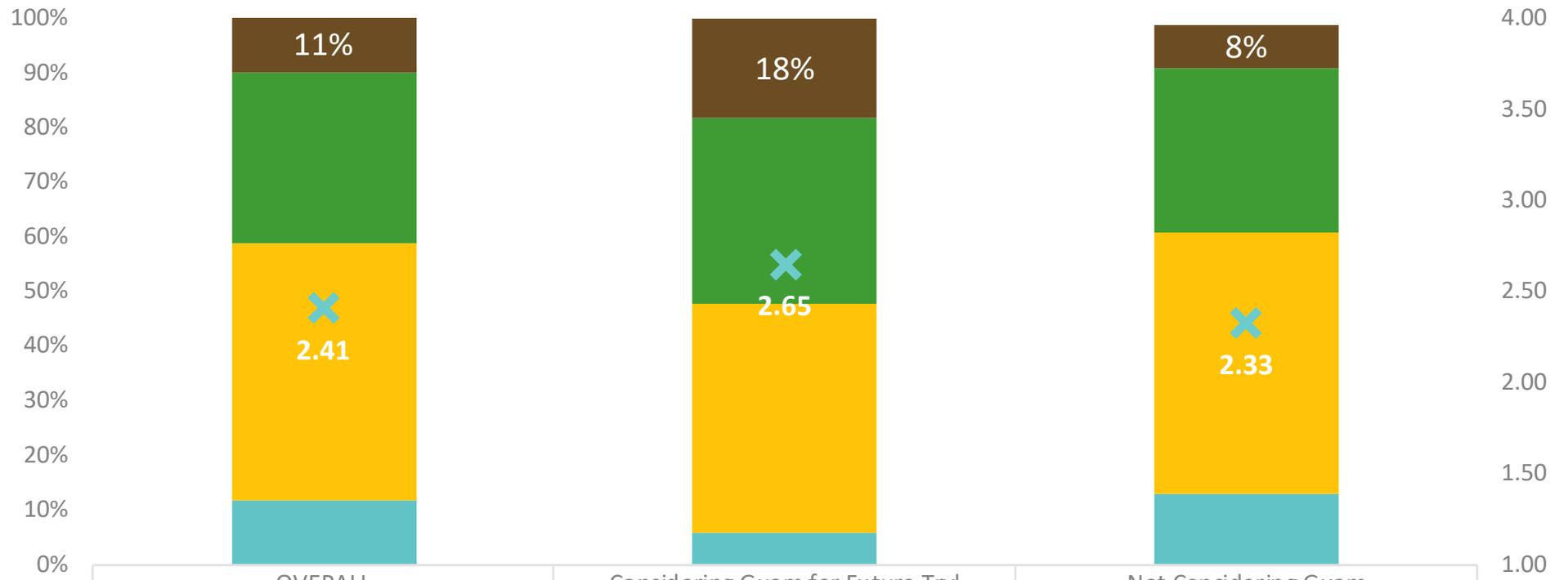
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	23%	25%	22%
Somewhat Important (3)	47%	46%	47%
Somewhat unimportant (2)	25%	21%	26%
Very unimportant (1)	5%	7%	5%
BASE	303	71	232
MEAN	2.87	2.90	2.86

I would like to meet new and interesting people



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	13%	23%	10%
Somewhat Important (3)	41%	45%	40%
Somewhat unimportant (2)	43%	31%	46%
Very unimportant (1)	3%	1%	3%
BASE	303	71	232
MEAN	2.65	2.89	2.57

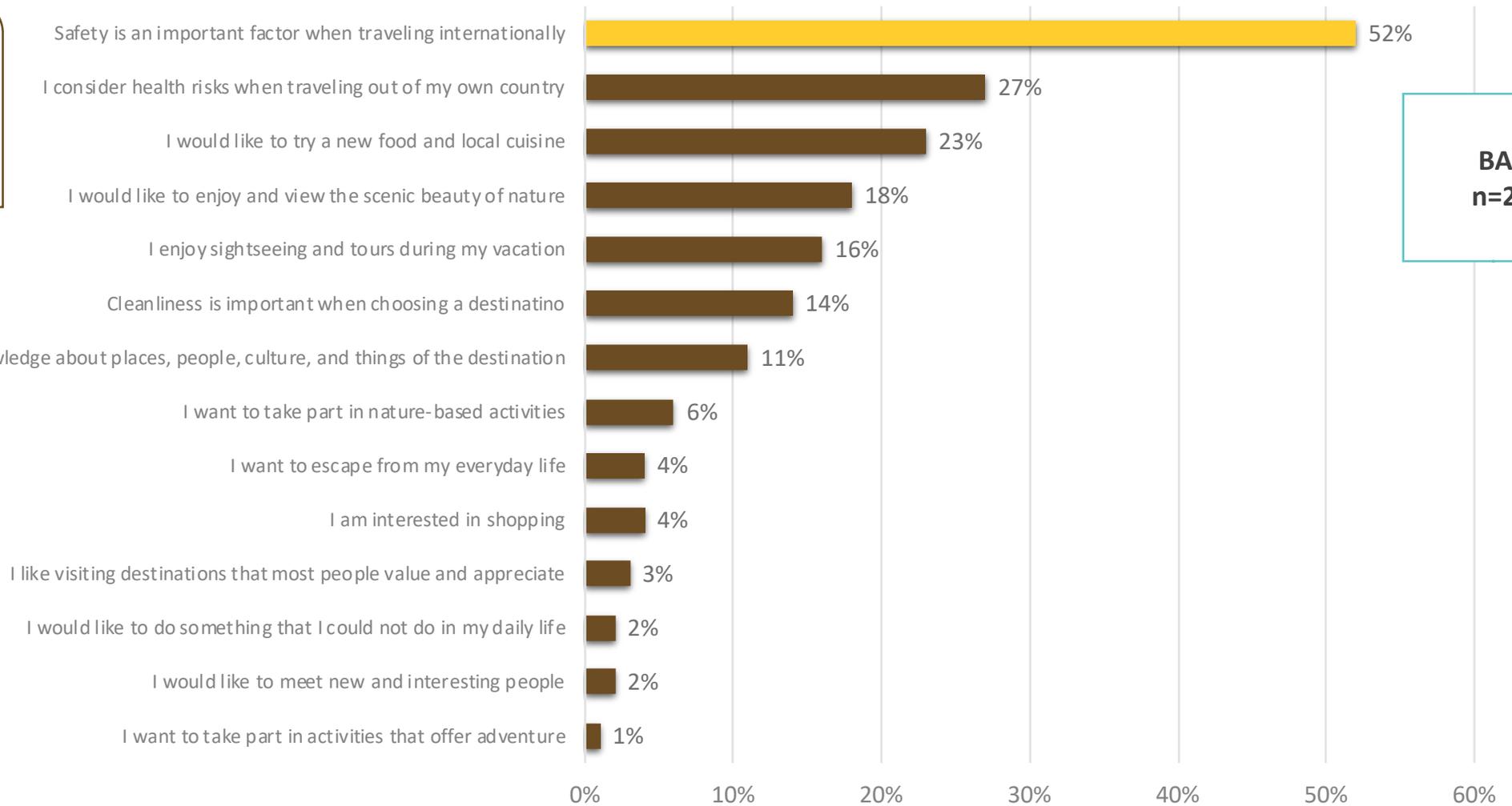
I want to take part in activities that offer adventure



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	11%	18%	8%
Somewhat Important (3)	31%	34%	30%
Somewhat unimportant (2)	47%	42%	48%
Very unimportant (1)	12%	6%	13%
BASE	303	71	232
MEAN	2.41	2.65	2.33

DESTINATION SELECTION FACTORS – TOP TWO

Safety was the top selection factor chosen.



BASE
n=264

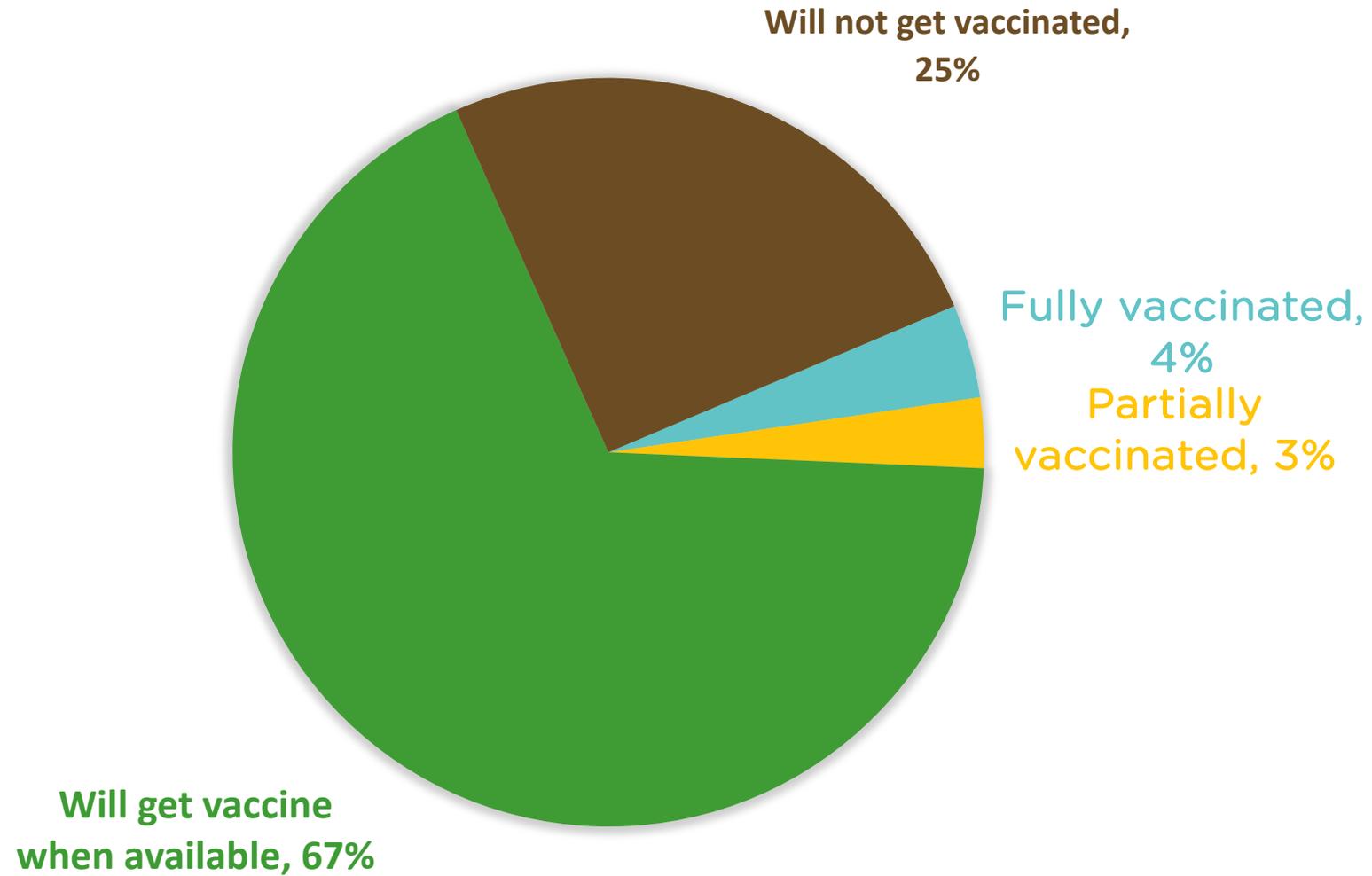


SECTION 2

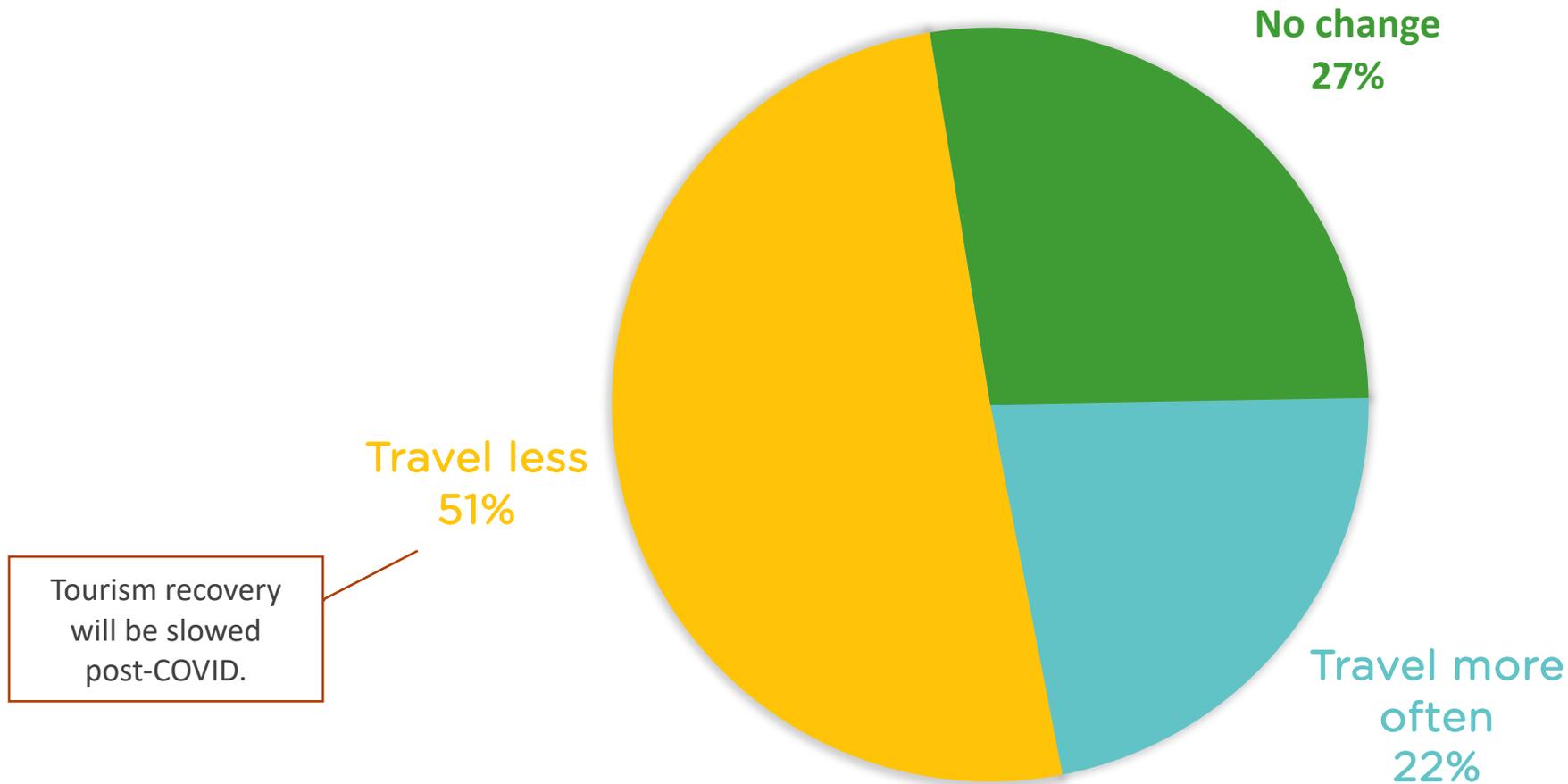
COVID-19



COVID-19 VACCINE STATUS



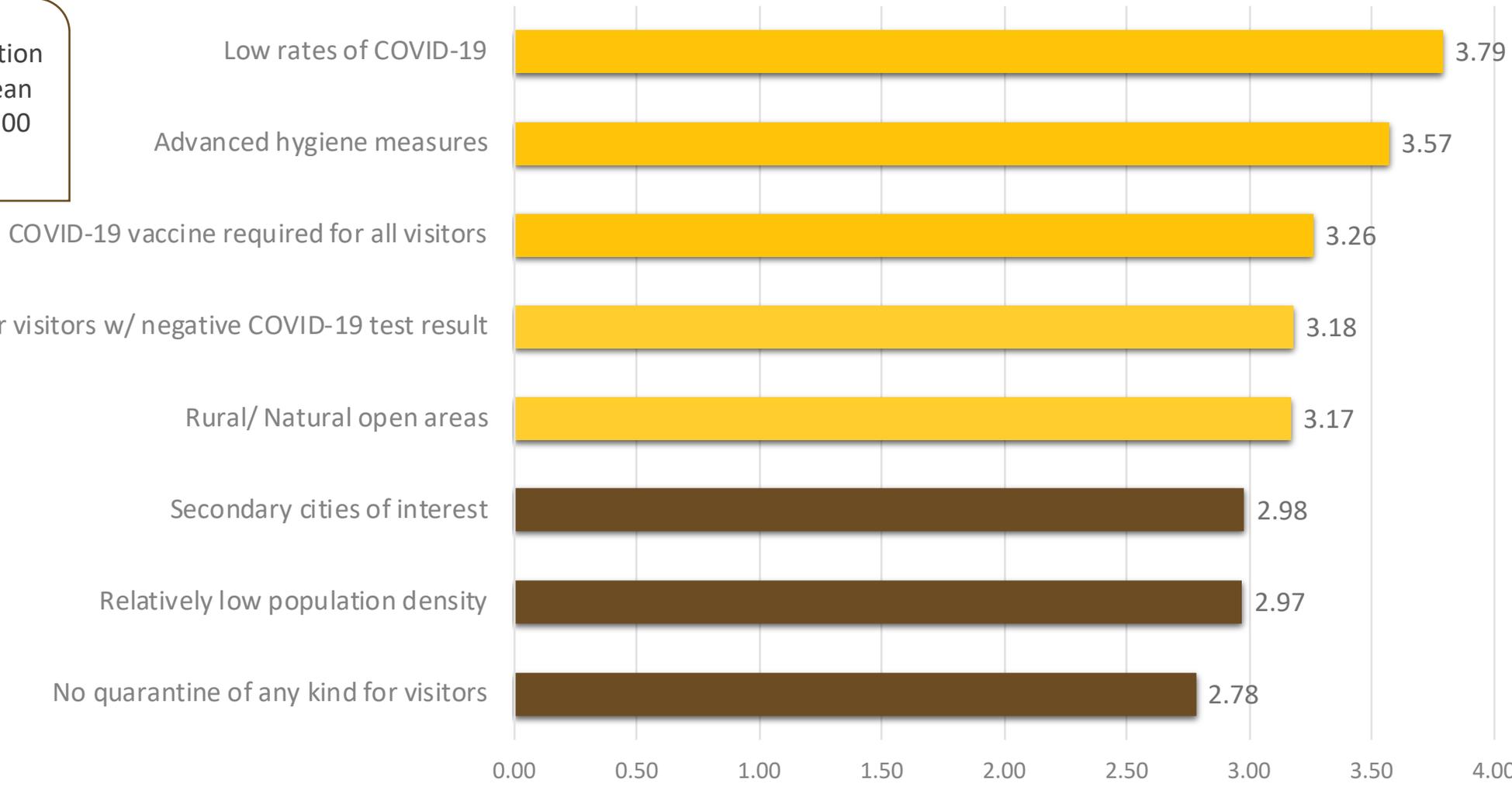
POST-COVID TRAVEL



POST-COVID TRAVEL – IMPORTANCE

4PT RATING SCALE – MEAN SCORE

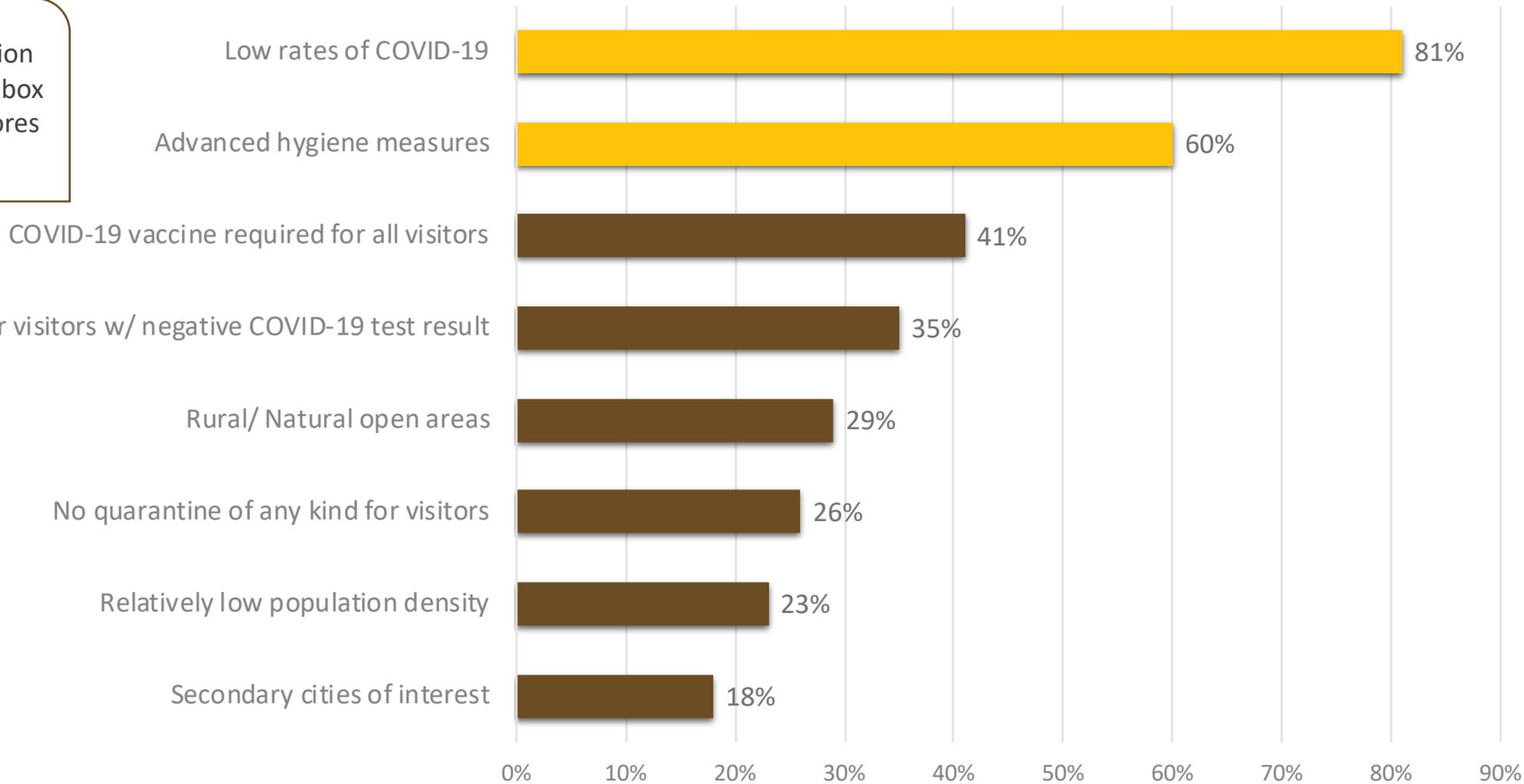
Three (yellow) selection factors received mean scores above the 3.00 threshold.



POST-COVID TRAVEL – IMPORTANCE

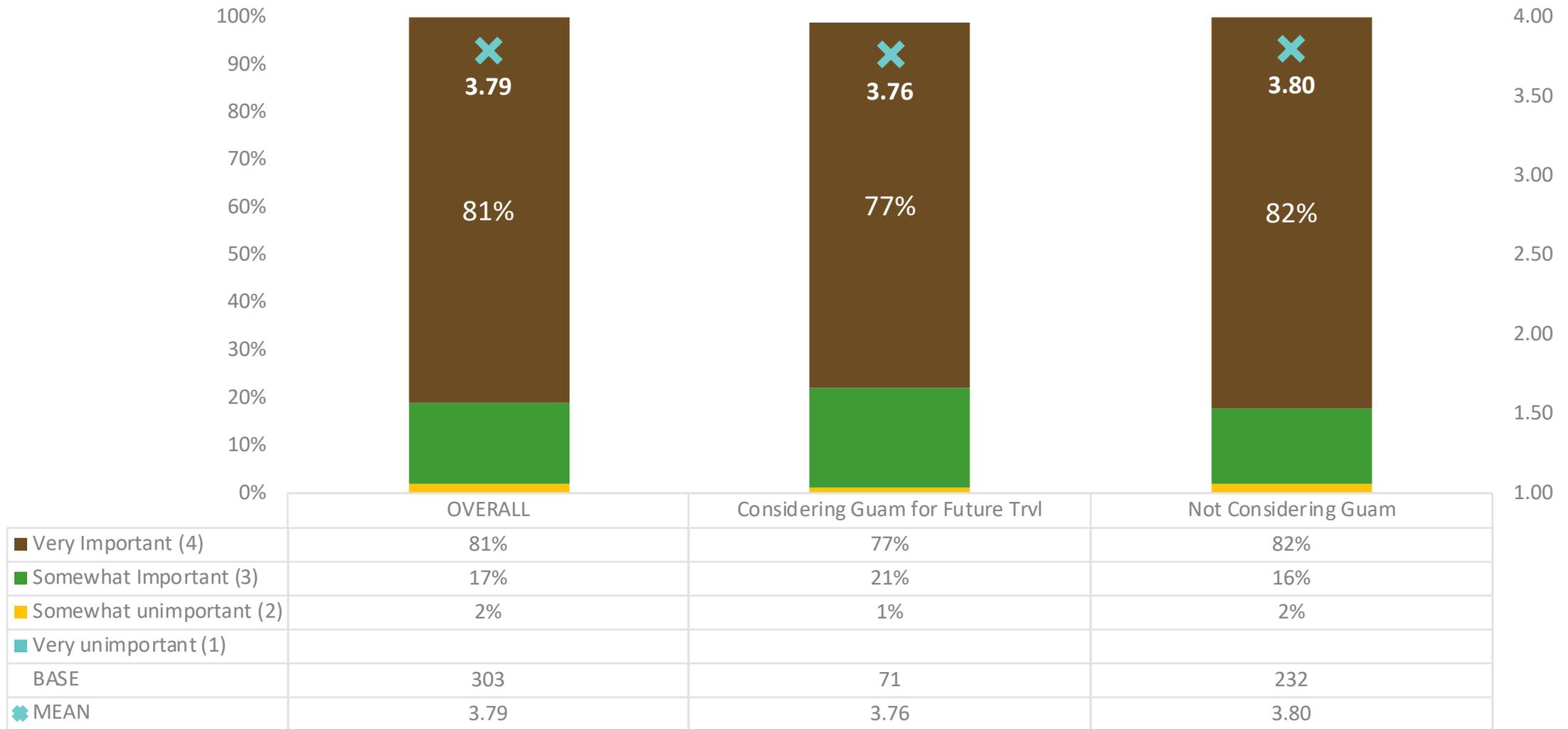
4PT RATING SCALE – TOP BOX (VERY IMPORTANT)

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



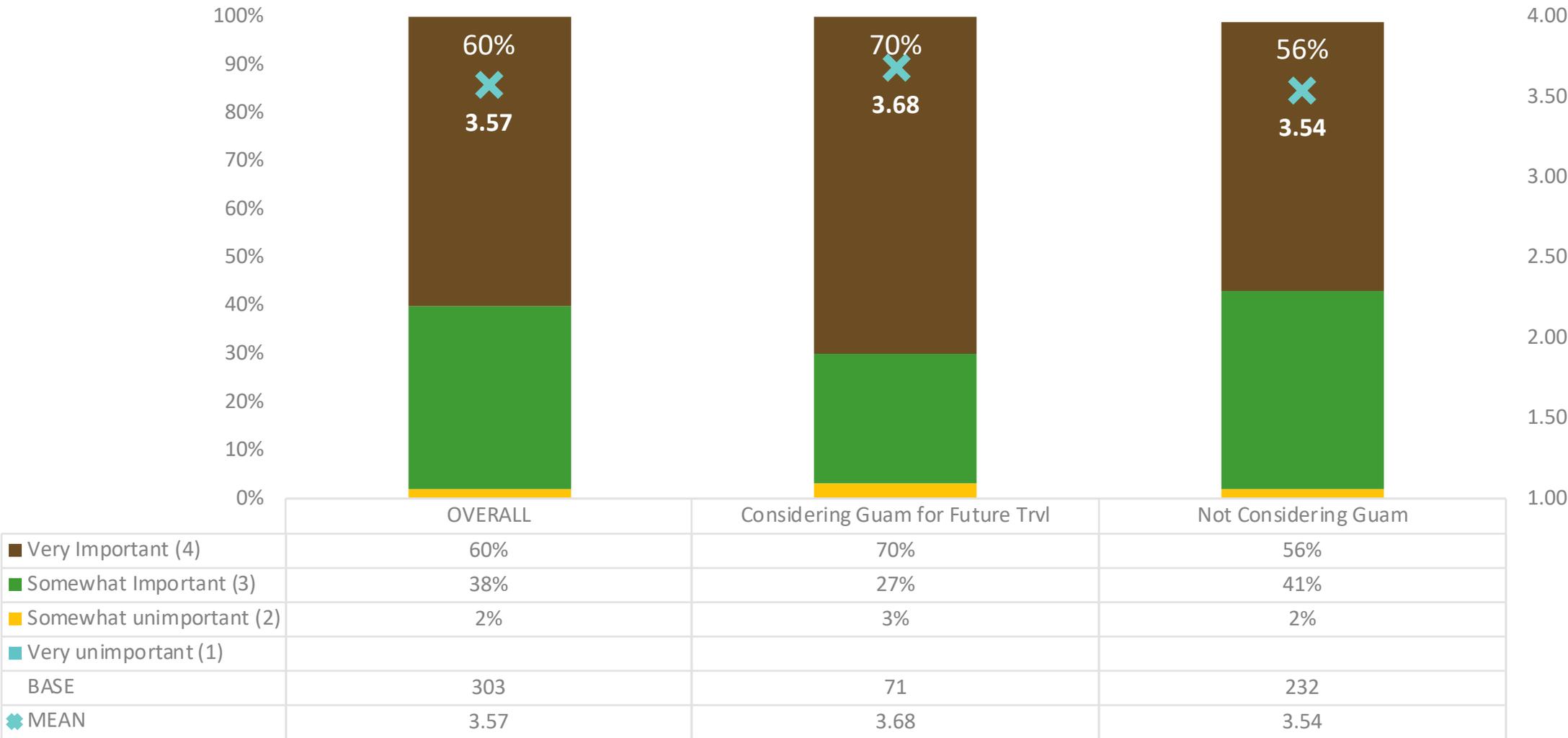
POST-COVID SELECTION FACTOR

Low rates of COVID-19



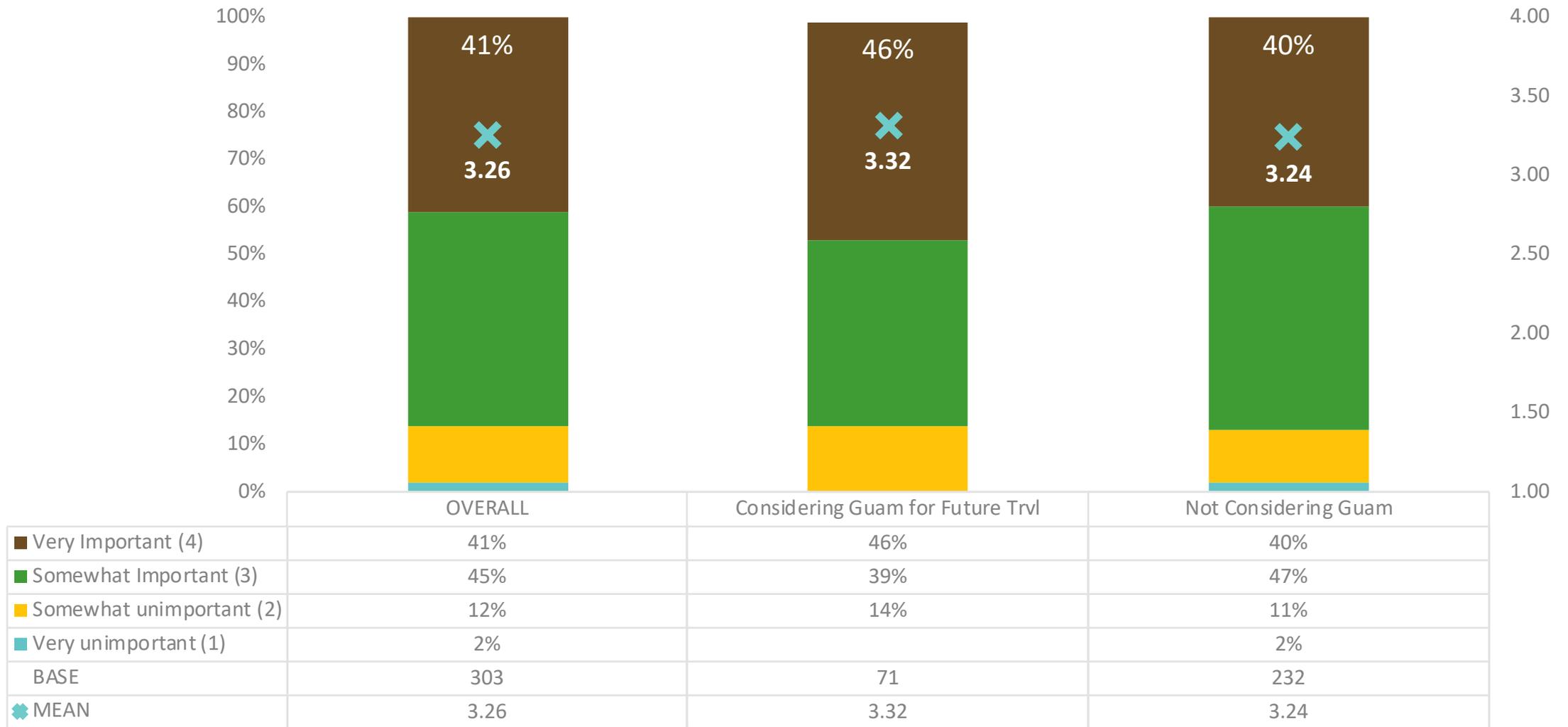
POST-COVID SELECTION FACTOR

Advanced hygiene measures



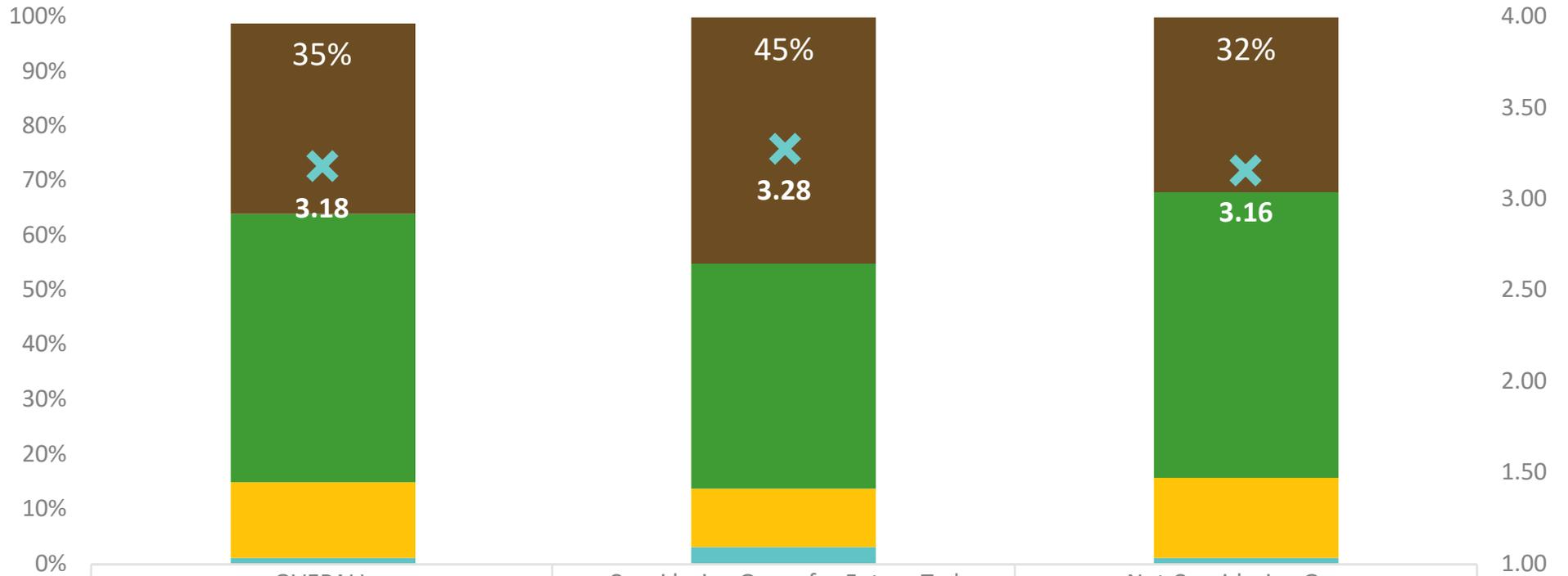
POST-COVID SELECTION FACTOR

COVID-19 vaccine required for all visitors



POST-COVID SELECTION FACTOR

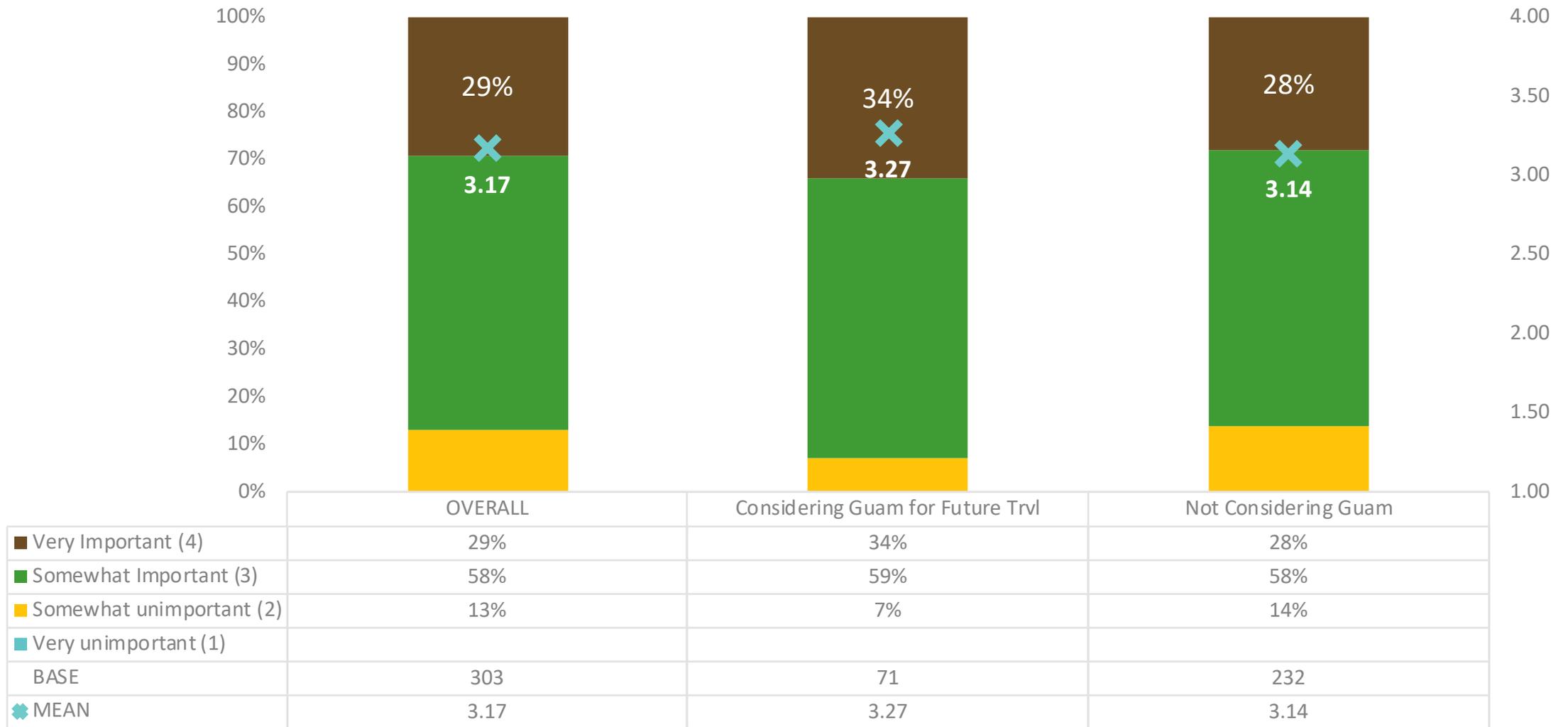
No quarantine for visitors w/ negative COVID-19 test results



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	35%	45%	32%
Somewhat Important (3)	49%	41%	52%
Somewhat unimportant (2)	14%	11%	15%
Very unimportant (1)	1%	3%	1%
BASE	303	71	232
MEAN	3.18	3.28	3.16

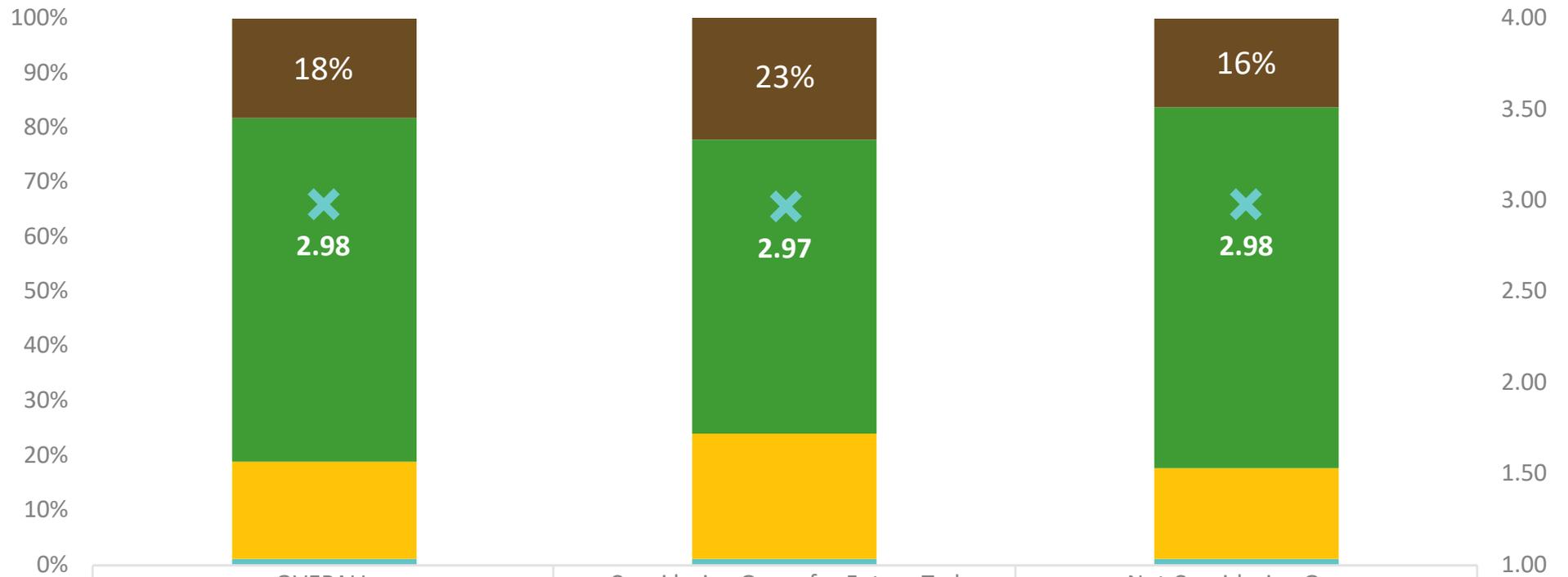
POST-COVID SELECTION FACTOR

Rural/ natural open areas



POST-COVID SELECTION FACTOR

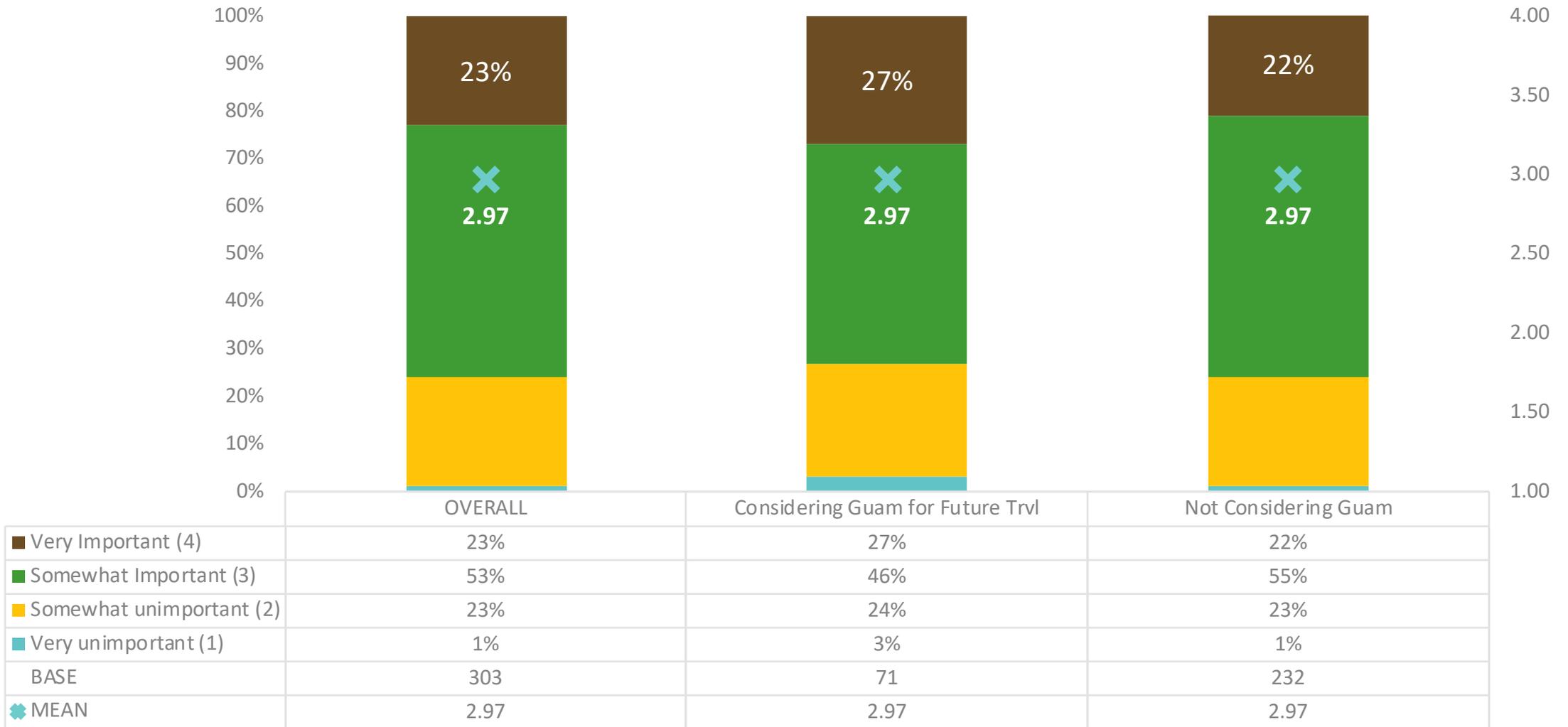
Secondary cities of interest



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	18%	23%	16%
Somewhat Important (3)	63%	54%	66%
Somewhat unimportant (2)	18%	23%	17%
Very unimportant (1)	1%	1%	1%
BASE	303	71	232
MEAN	2.98	2.97	2.98

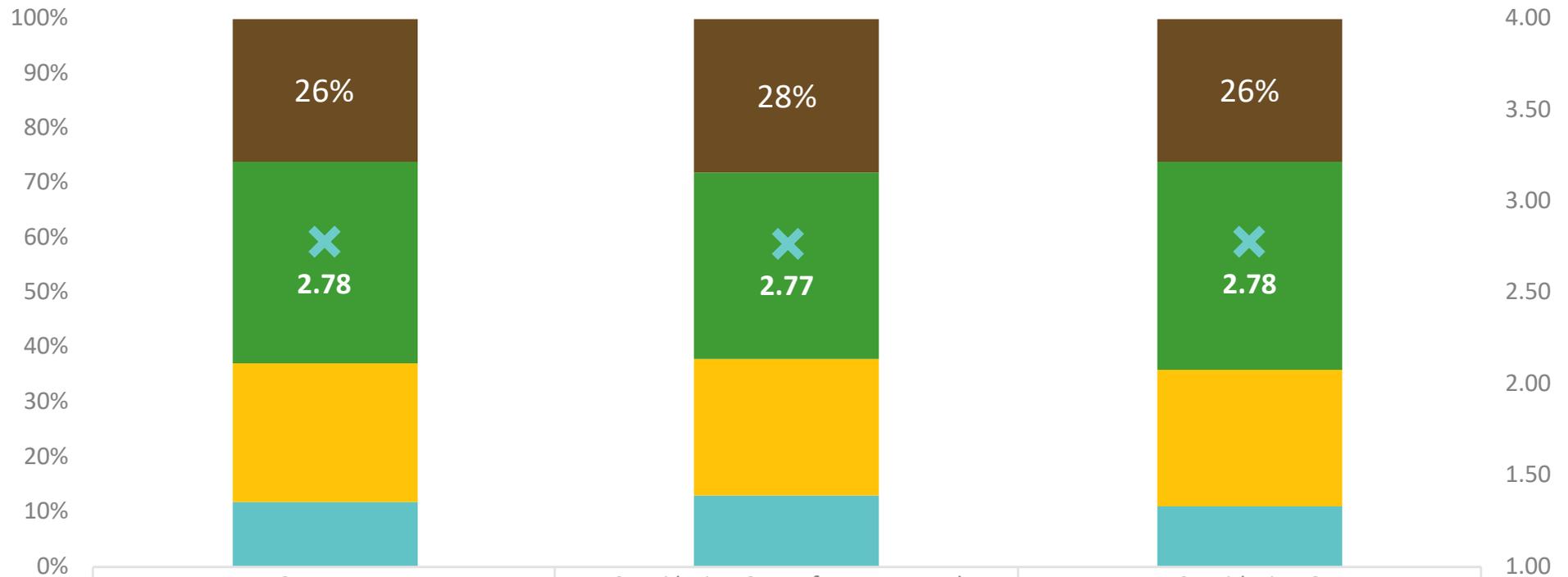
POST-COVID SELECTION FACTOR

Relatively low population density



POST-COVID SELECTION FACTOR

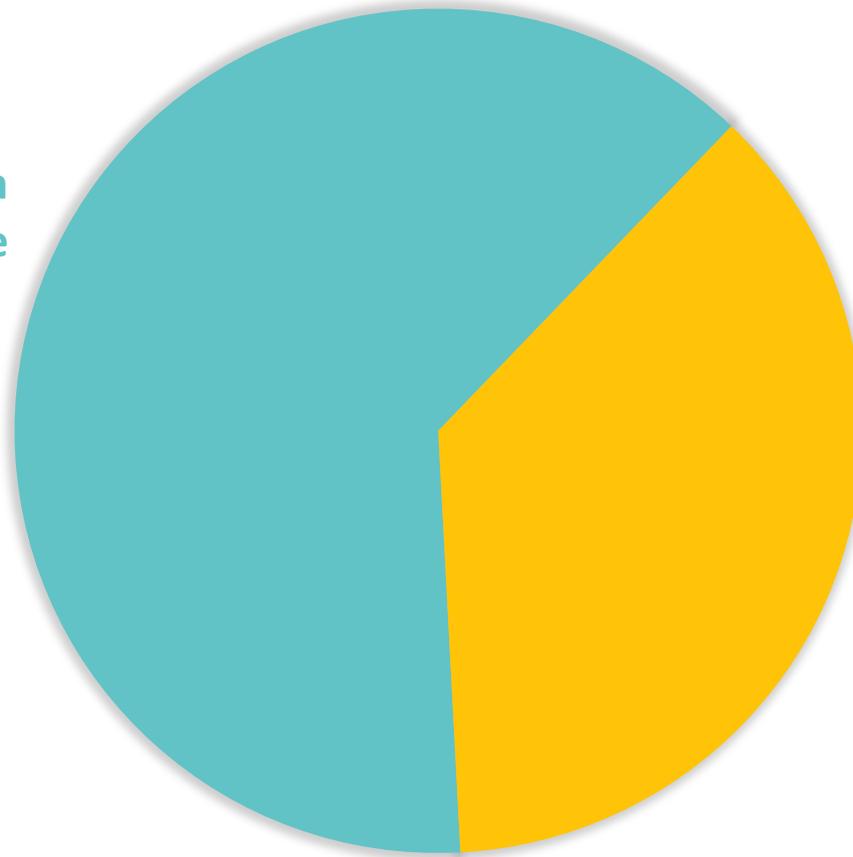
No quarantine of any kind for visitors



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Important (4)	26%	28%	26%
Somewhat Important (3)	37%	34%	38%
Somewhat unimportant (2)	25%	25%	25%
Very unimportant (1)	12%	13%	11%
BASE	303	71	232
MEAN	2.78	2.77	2.78

GUAM AIRPORT COVID-19 SAFETY MEASURES

I see these improvements as added value and am willing to pay a little more for them
63%

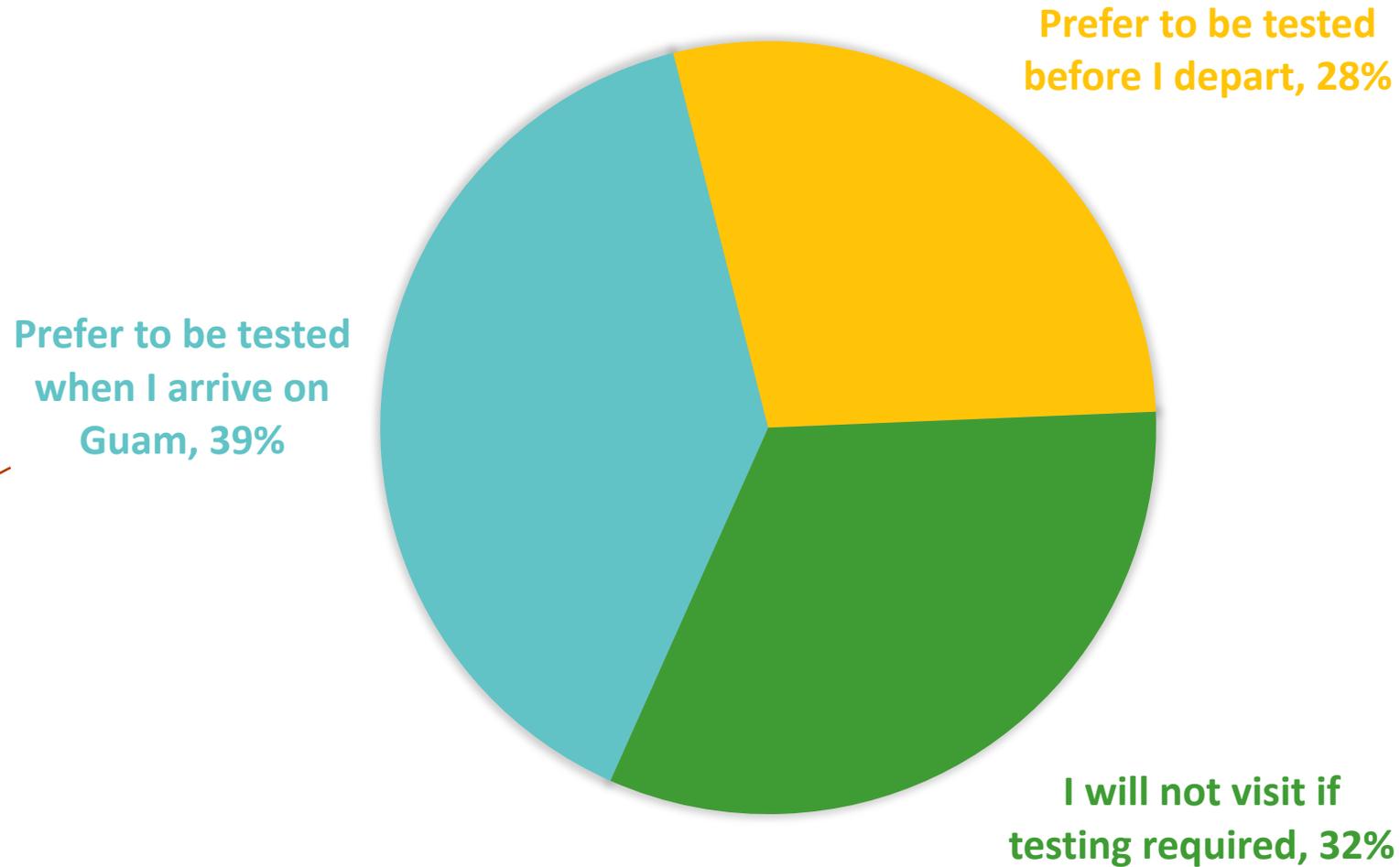


I am looking for a budget travel package and I am willing to forego these added benefits
37%

Majority appear to be okay with a fee that results in increased COVID 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

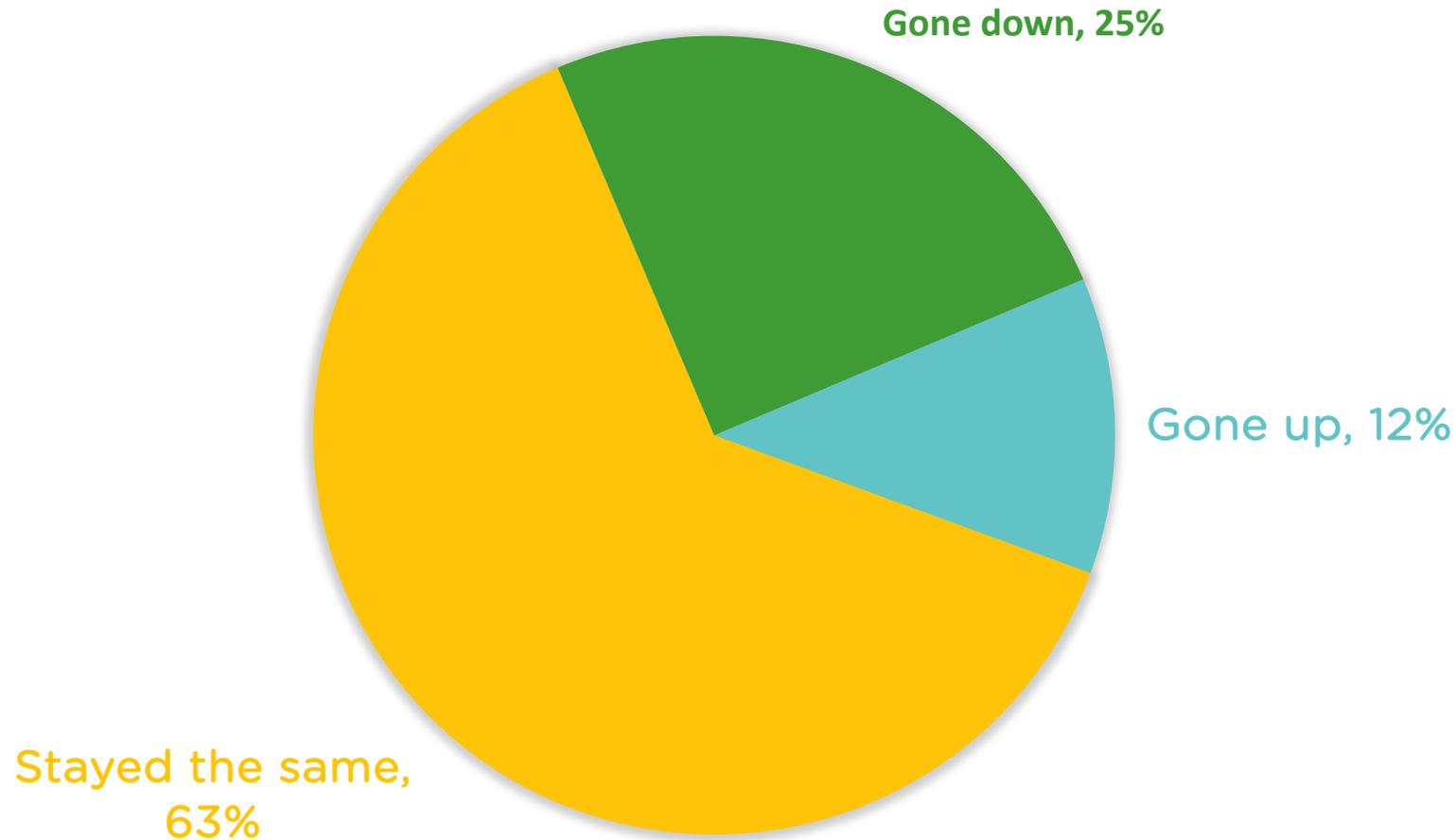


Greater willingness to be tested upon arrival.

IMPACT ON TRAVEL – FDA APPROVED COVID TEST



CHANGES IN HOUSEHOLD INCOME DURING PANDEMIC



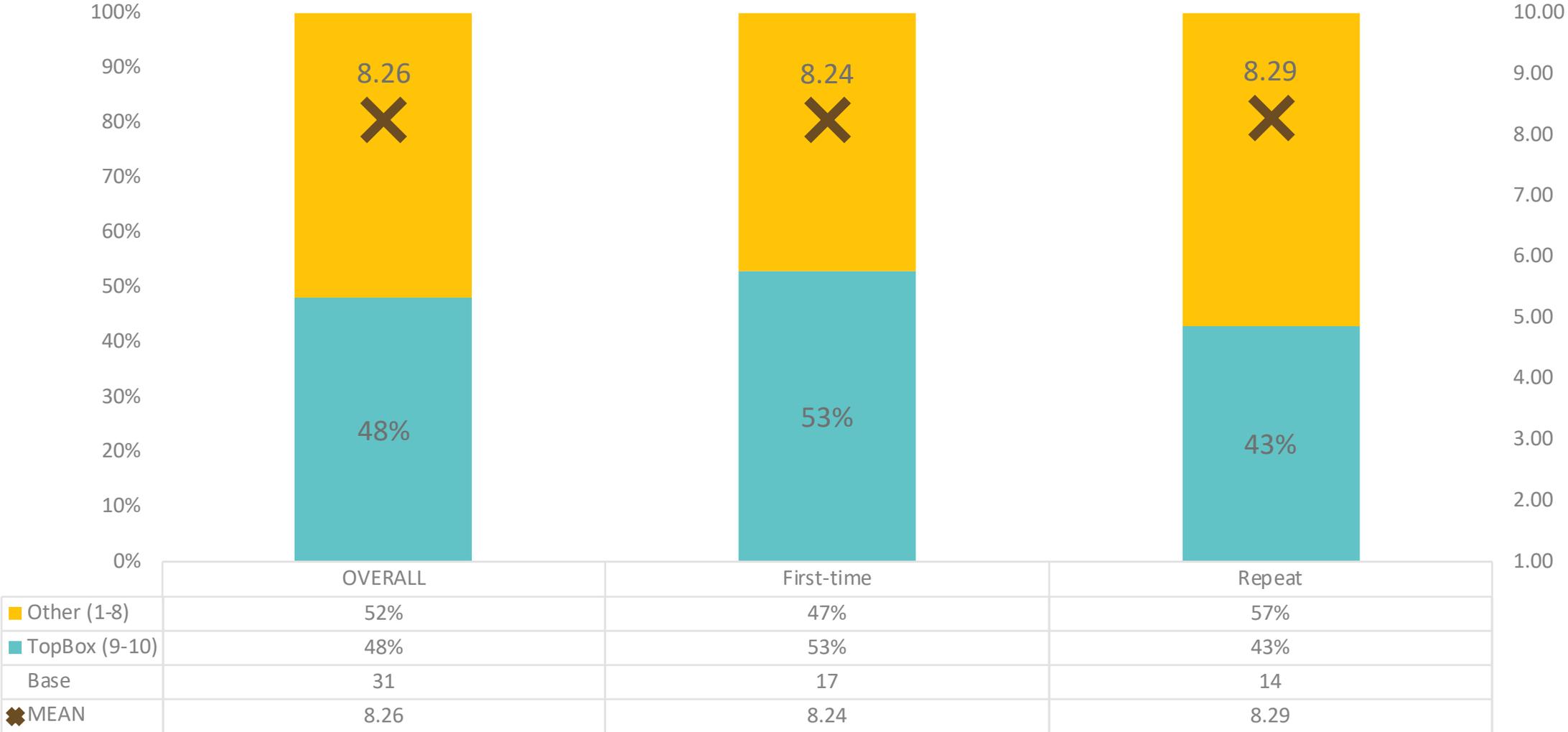


SECTION 3

VISITOR SATISFACTION

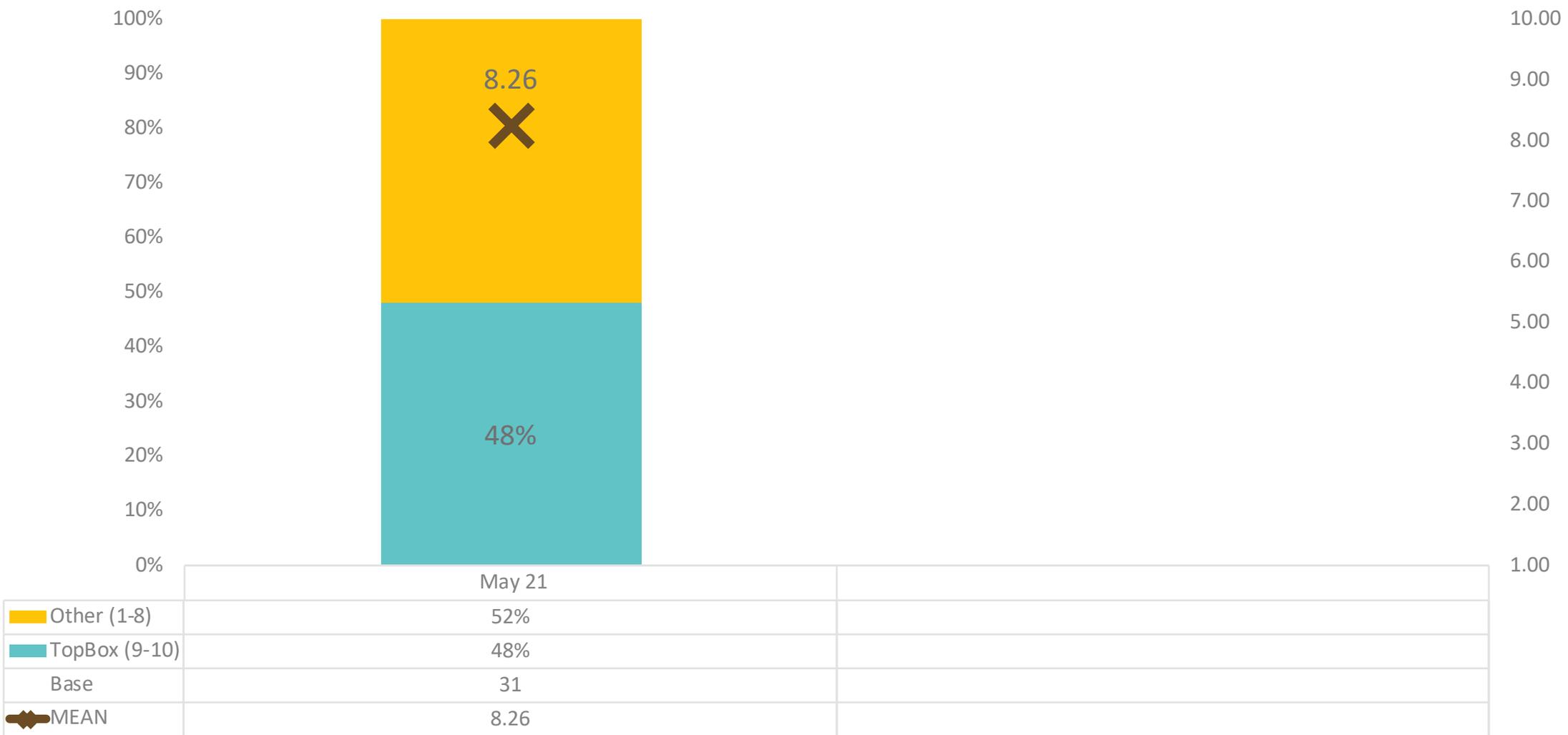


OVERALL SATISFACTION – 10PT SCALE

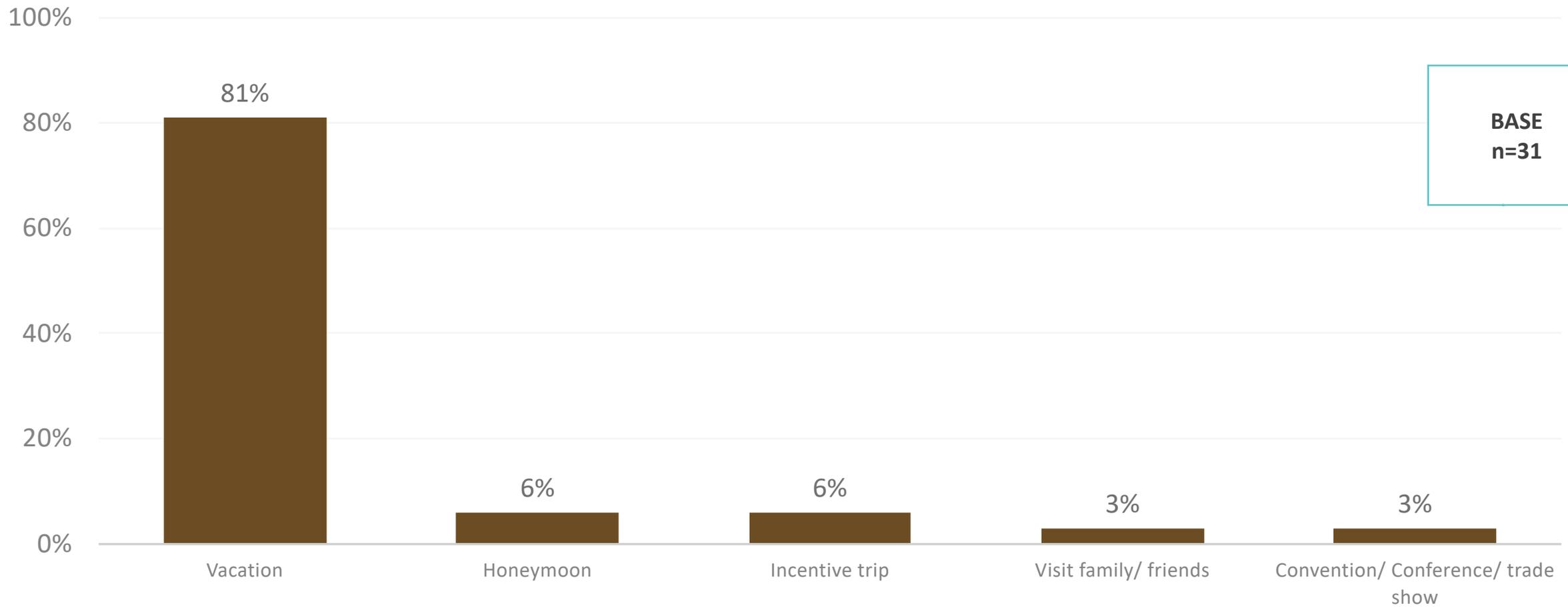


OVERALL SATISFACTION – 10PT SCALE

Tracking



PRIMARY TRAVEL MOTIVATION



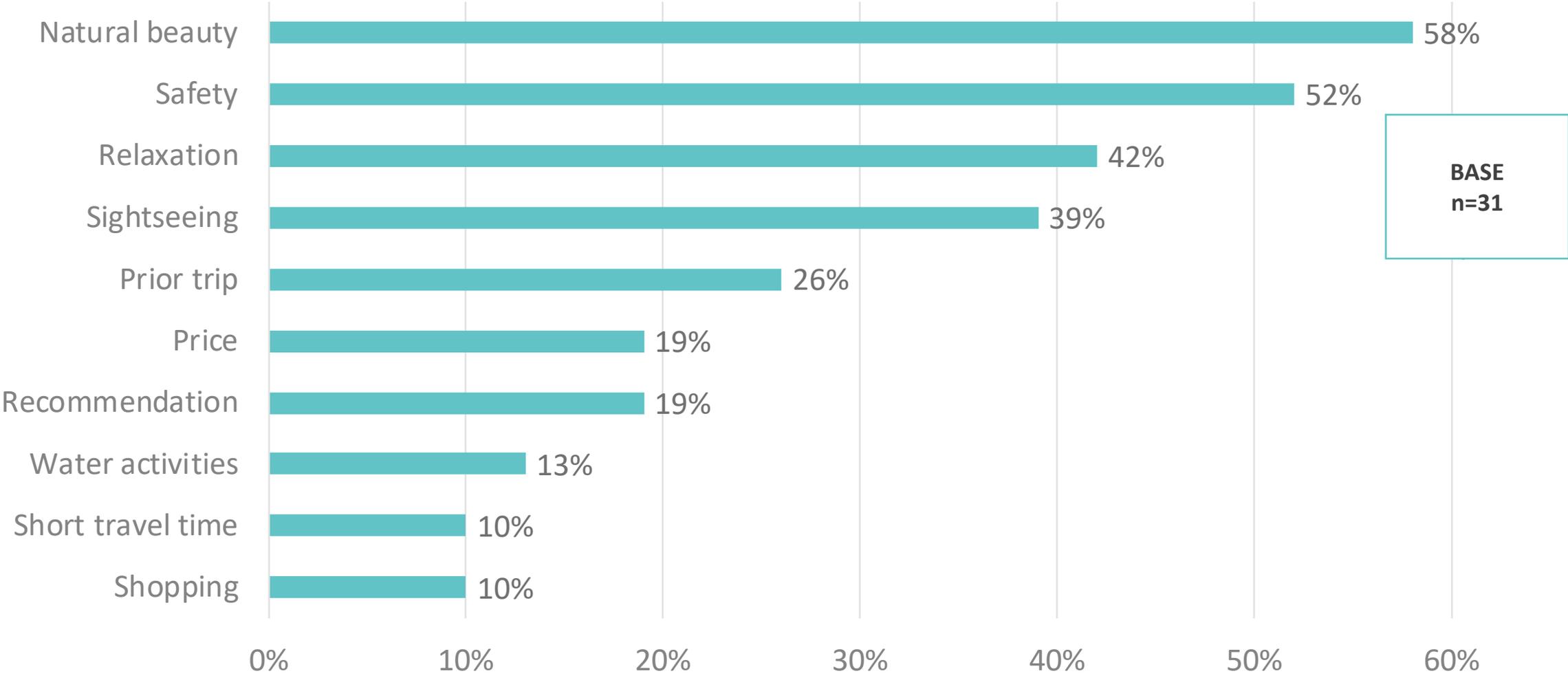
PRIMARY TRAVEL MOTIVATION

Tracking

	May 21
BASE	31
Pleasure/ Vacation	81%
Honeymoon	6%
Incentive trip	6%
Visit family/friends	3%
Business convention/ conference/ trade show	3%



TRAVEL MOTIVATIONS – TOP 3



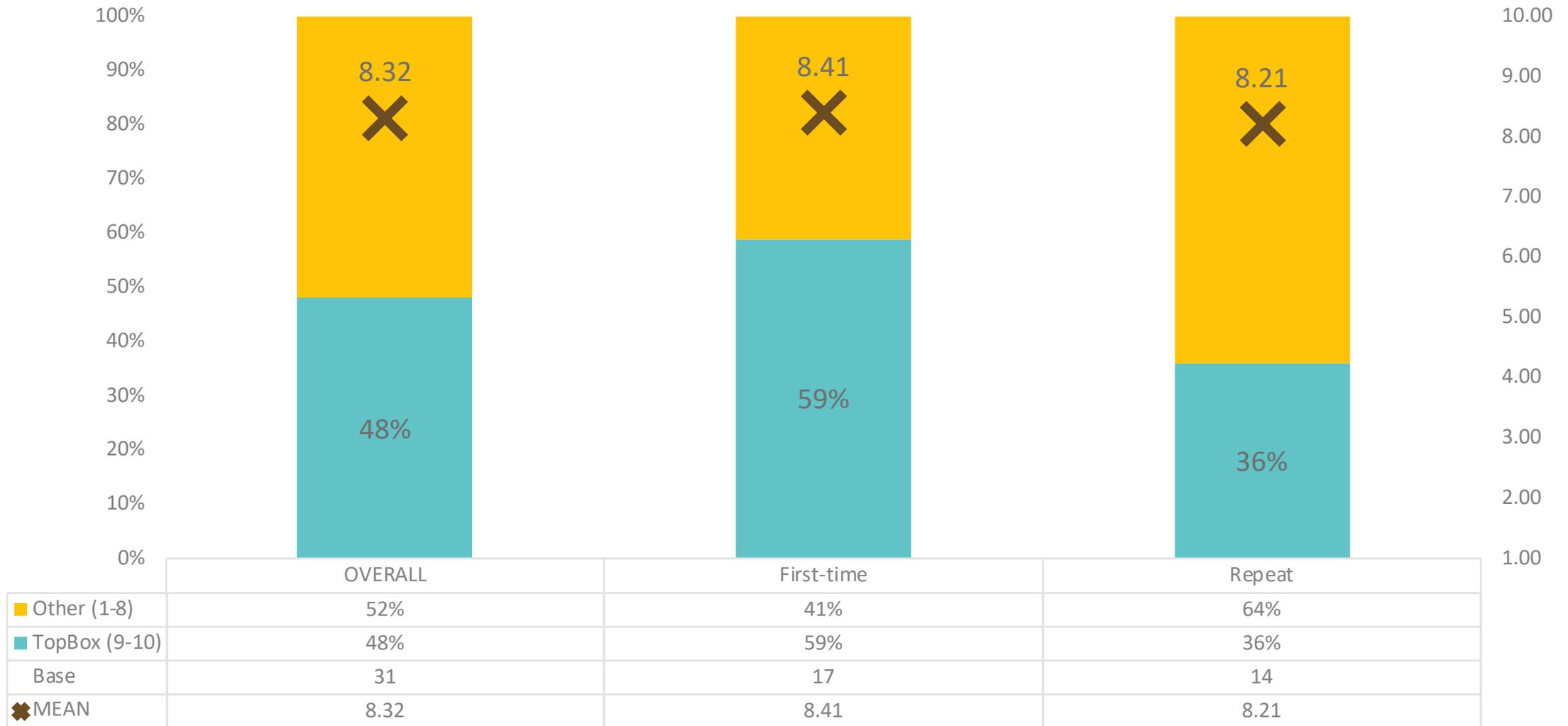
TRAVEL MOTIVATIONS – TOP 3

Tracking

	May-21
BASE	31
Beautiful seas, beaches, tropical climate	58%
Safe place to spend a vacation	52%
Relaxation	42%
Sightseeing	39%
Prior trip	26%
Price	19%
Recommendations	19%
Water activities	13%
Short travel time	10%
Shopping	10%

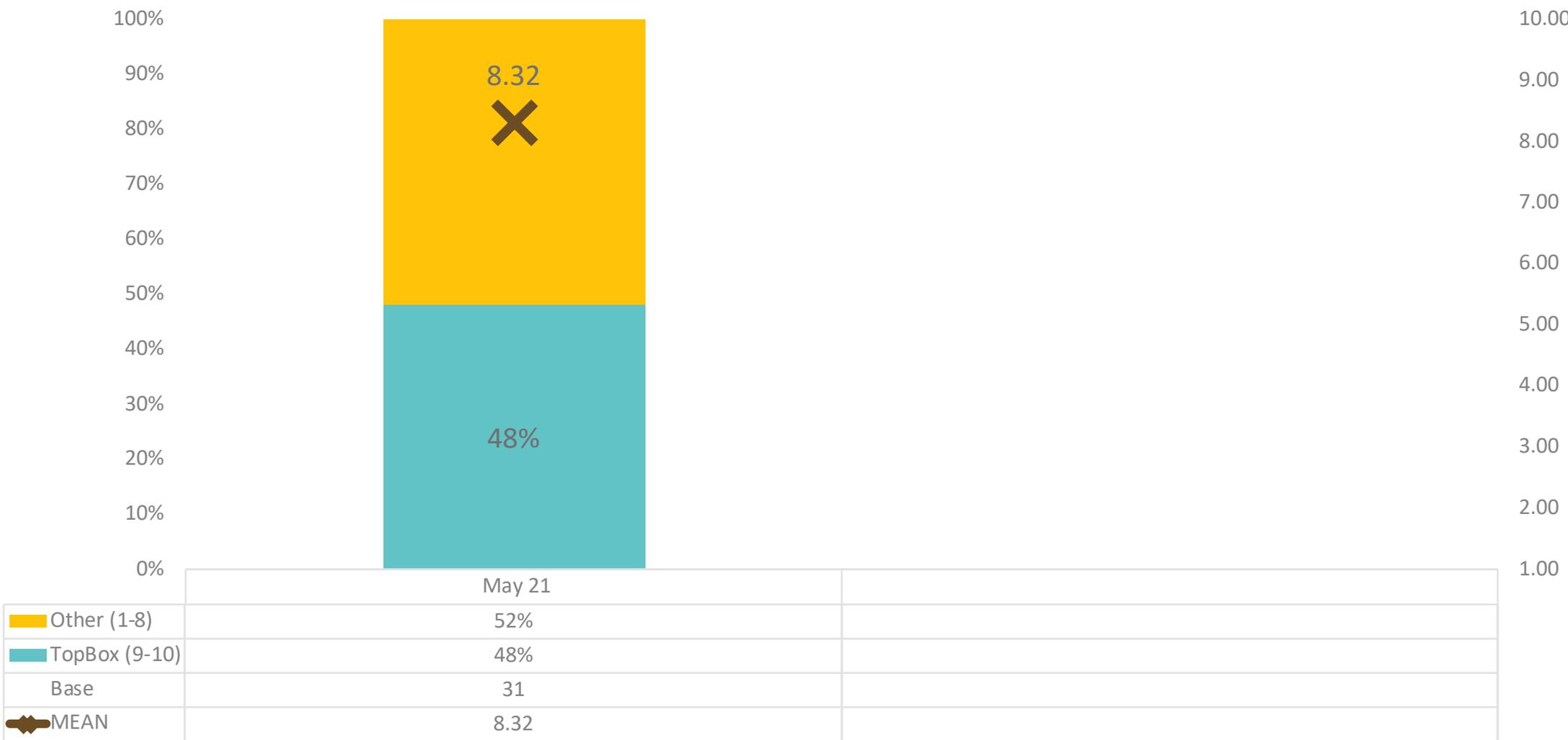


BRAND ADVOCACY – 10PT SCALE

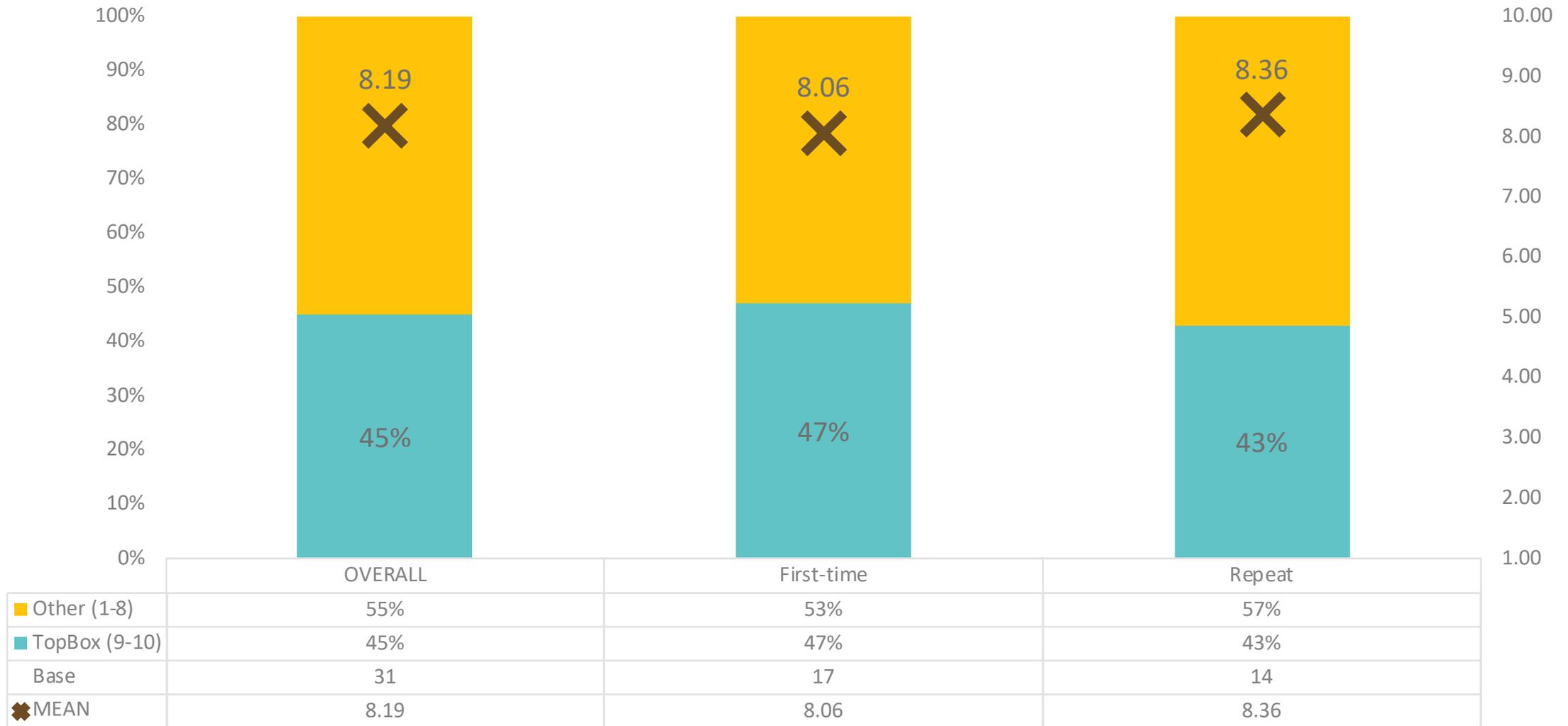


BRAND ADVOCACY – 10PT SCALE

Tracking

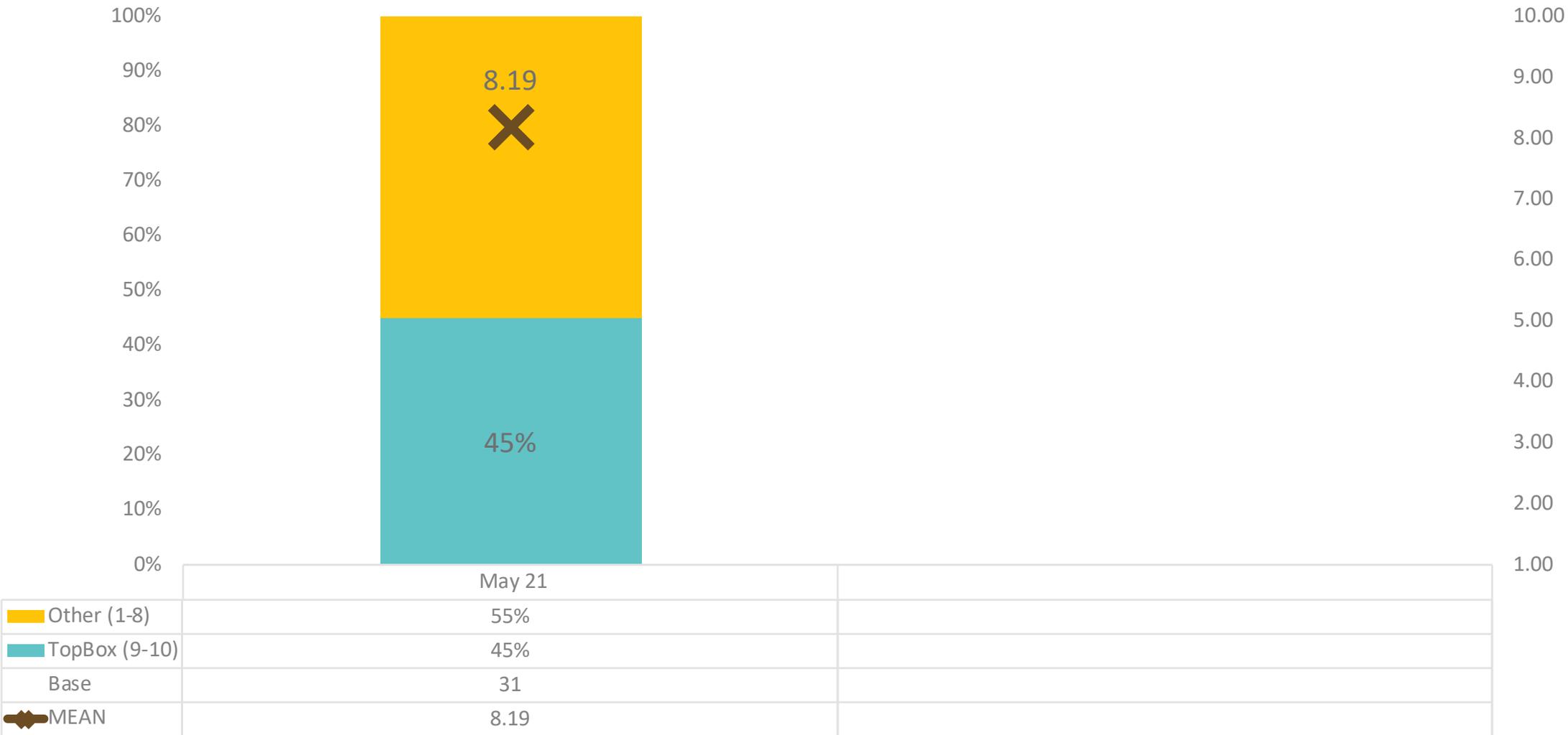


BRAND LOYALTY – 10PT SCALE

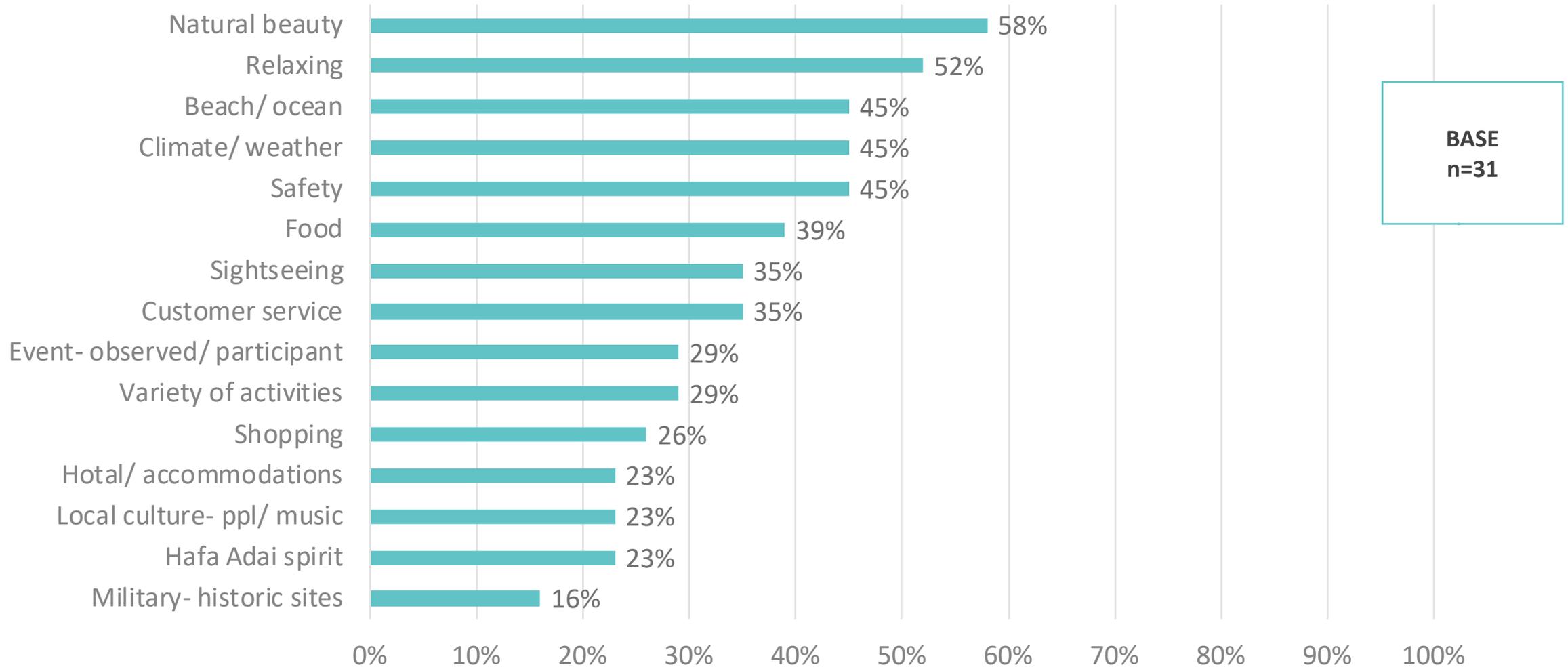


BRAND LOYALTY – 10PT SCALE

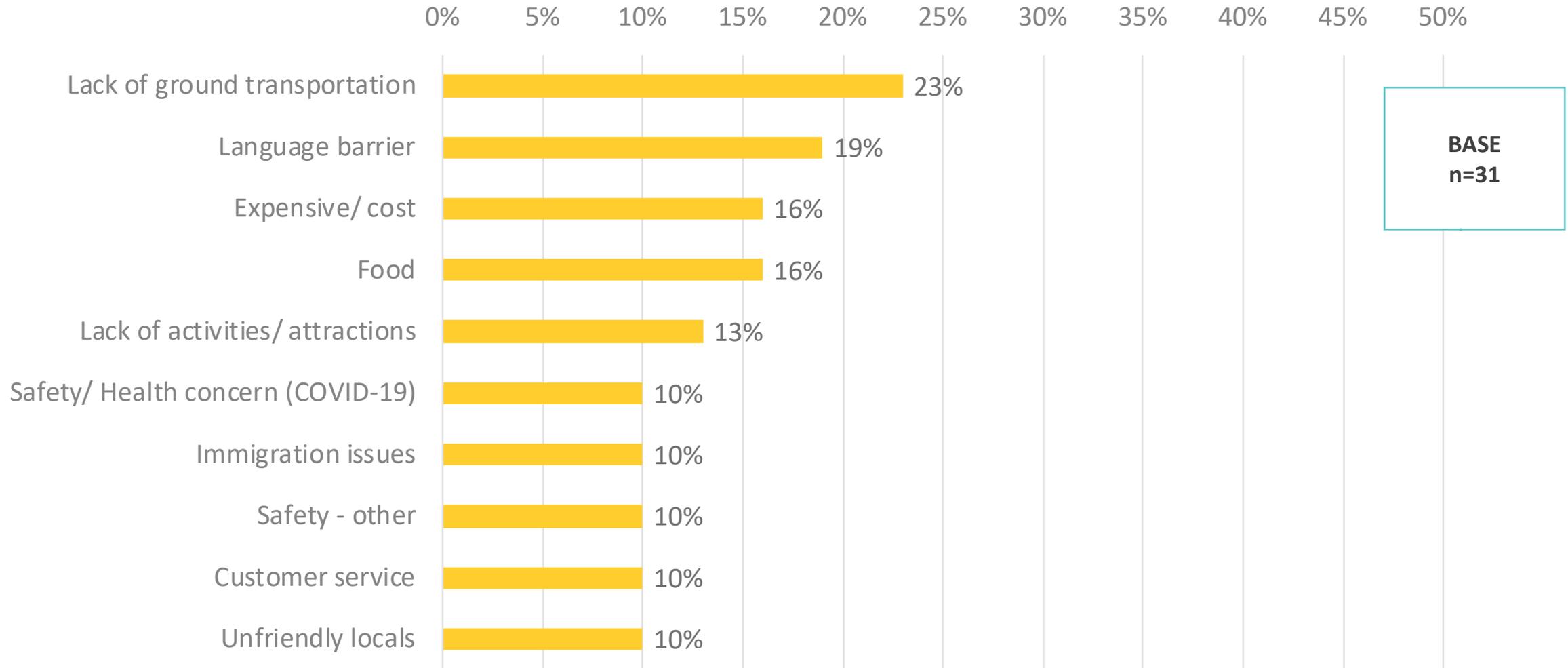
Tracking



GUAM TRAVELER – TRIP MOTIVATIONS



GUAM TRAVELERS – DRAWBACKS



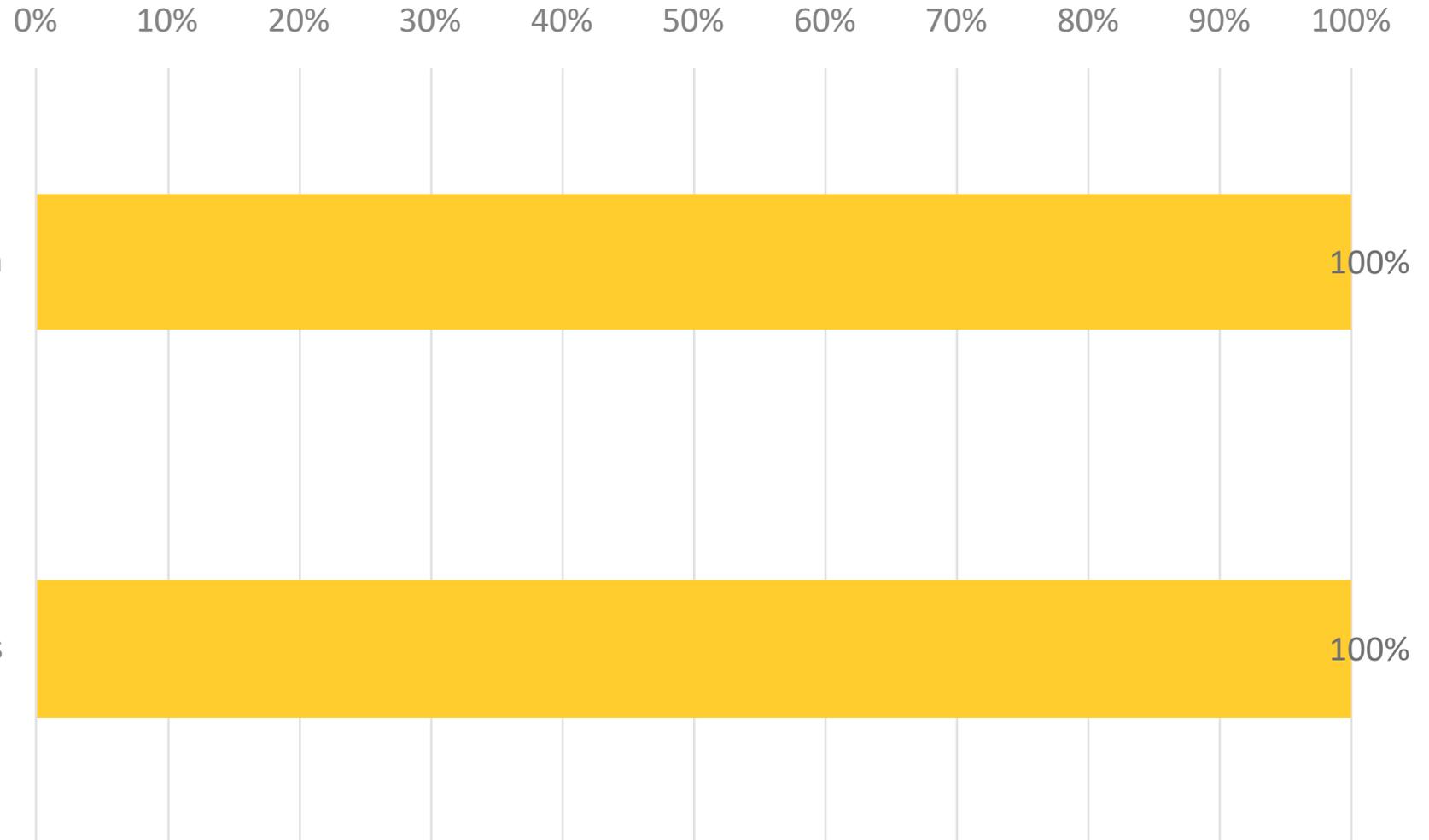
GUAM TRAVELERS – DRAWBACKS TRACKING

	May 21
BASE	31
Limited availability – ground transportation	23%
Language barrier	19%
Food	16%
Expensive	16%
Lack of activities/attractions	13%
Unfriendly locals	10%
Customer service	10%
Immigration	10%
Safety- COVID	10%
Safety- Other	10%



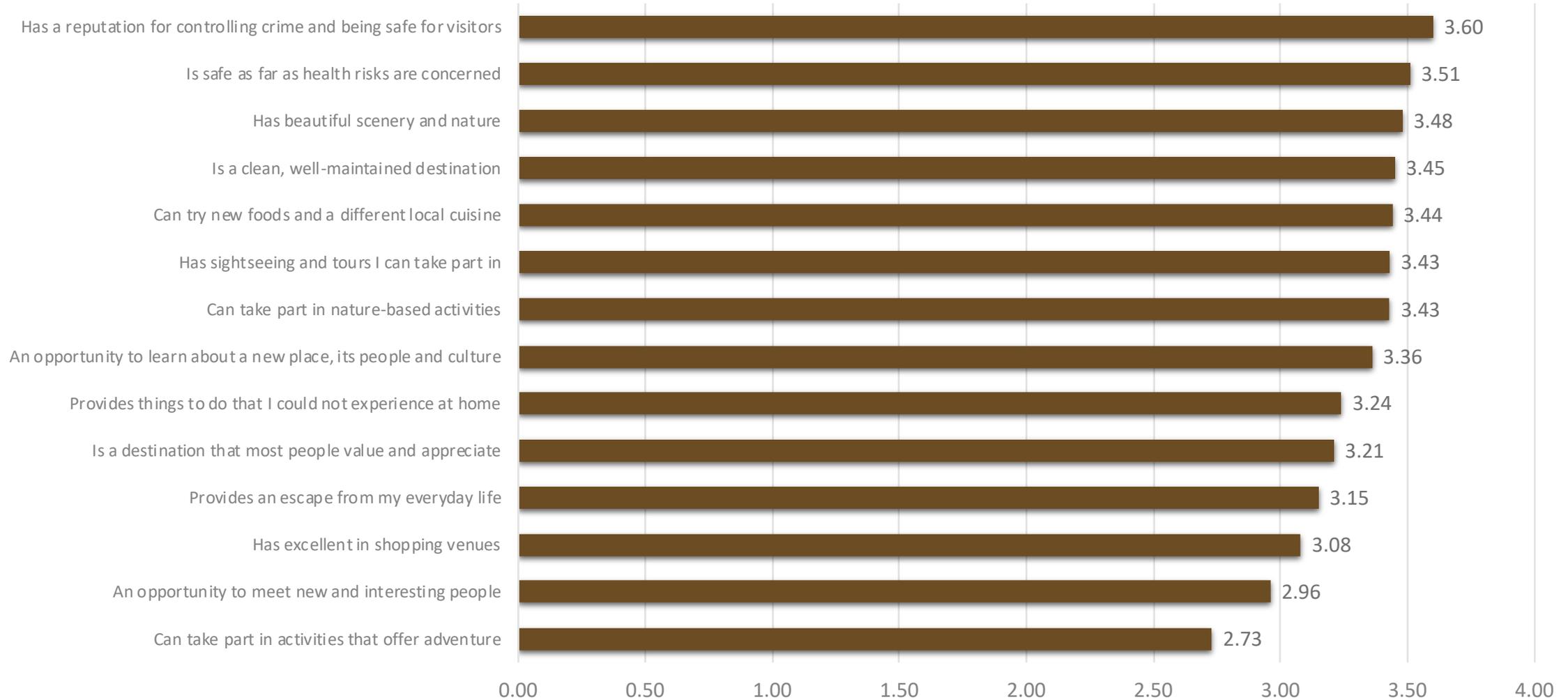
UNLIKELY TO RETURN – REASONS

Caution
small
base
n=1



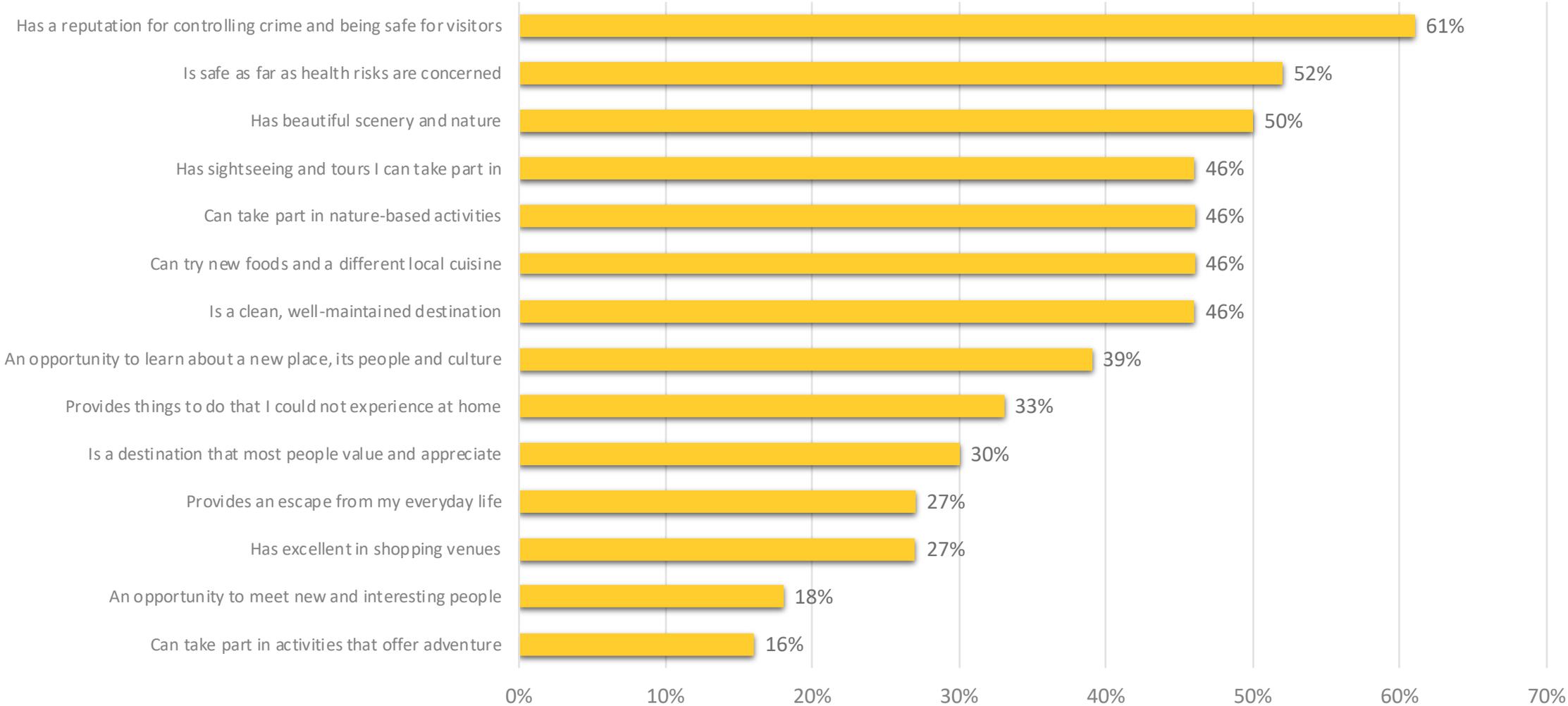
SELECTION FACTORS – SATISFACTION

MEAN SCORES 4PT SCALE

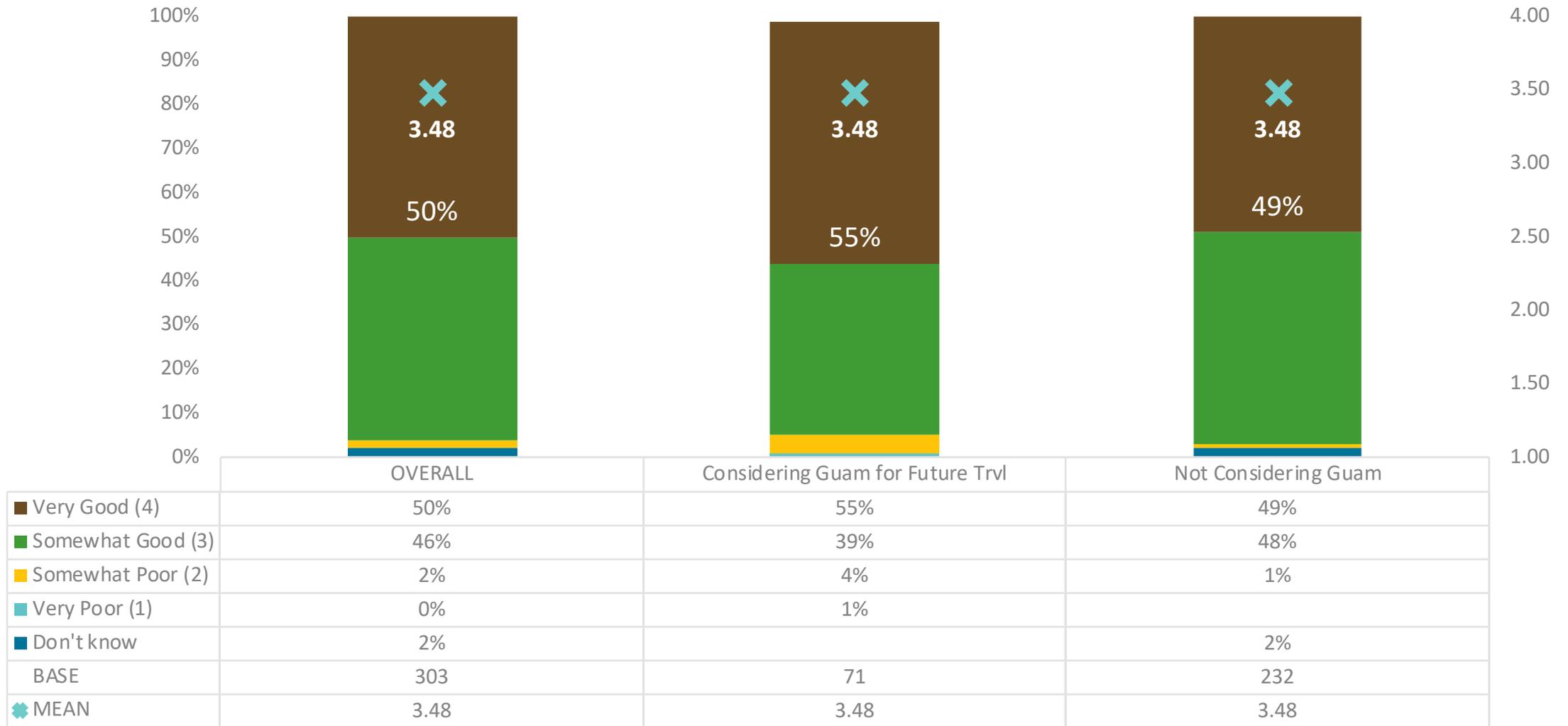


SELECTION FACTORS – SATISFACTION

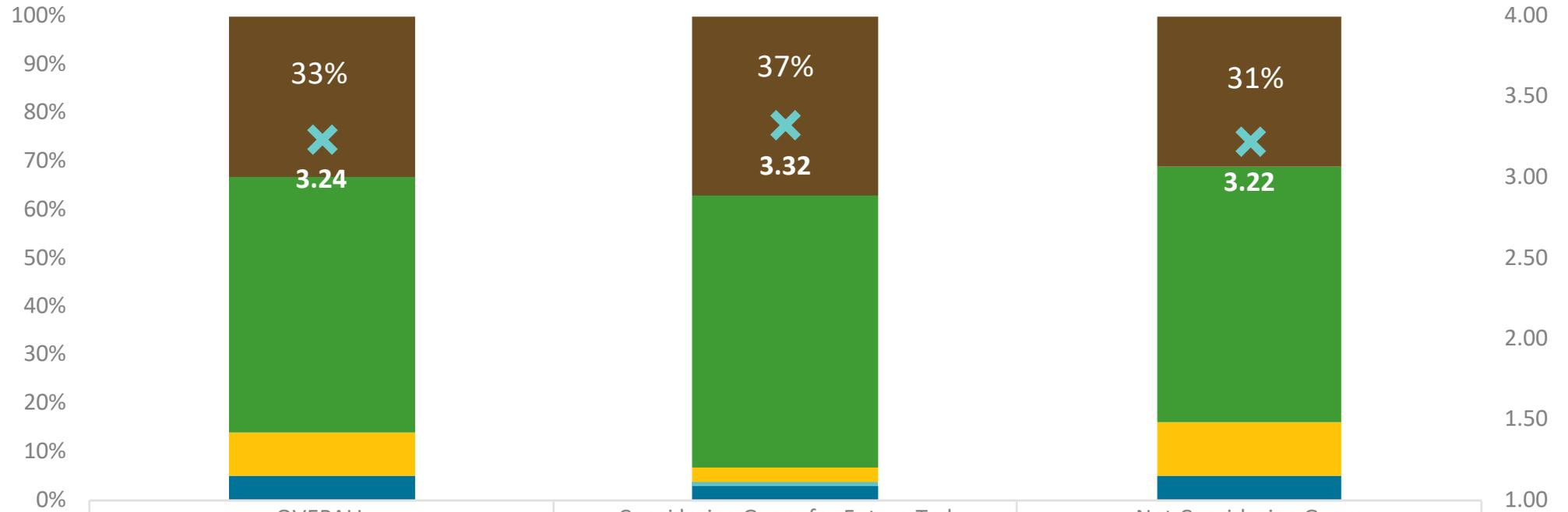
TOP BOX (VERY GOOD)



Has beautiful scenery and nature

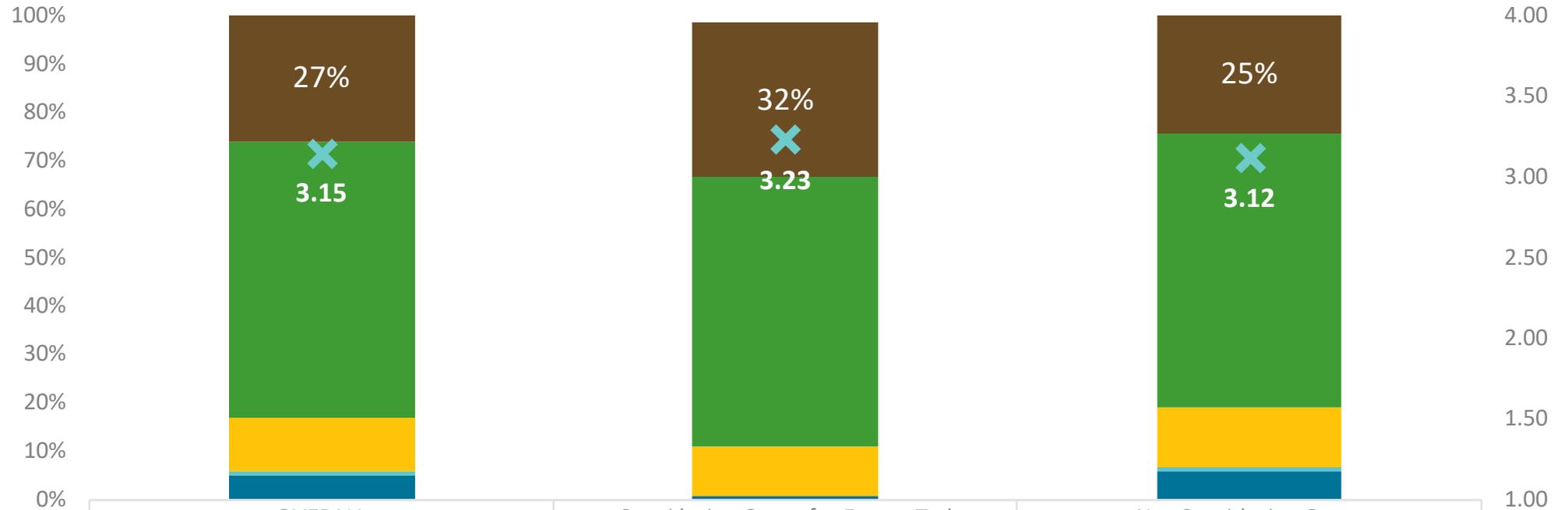


Provides things to do that I could not experience at home



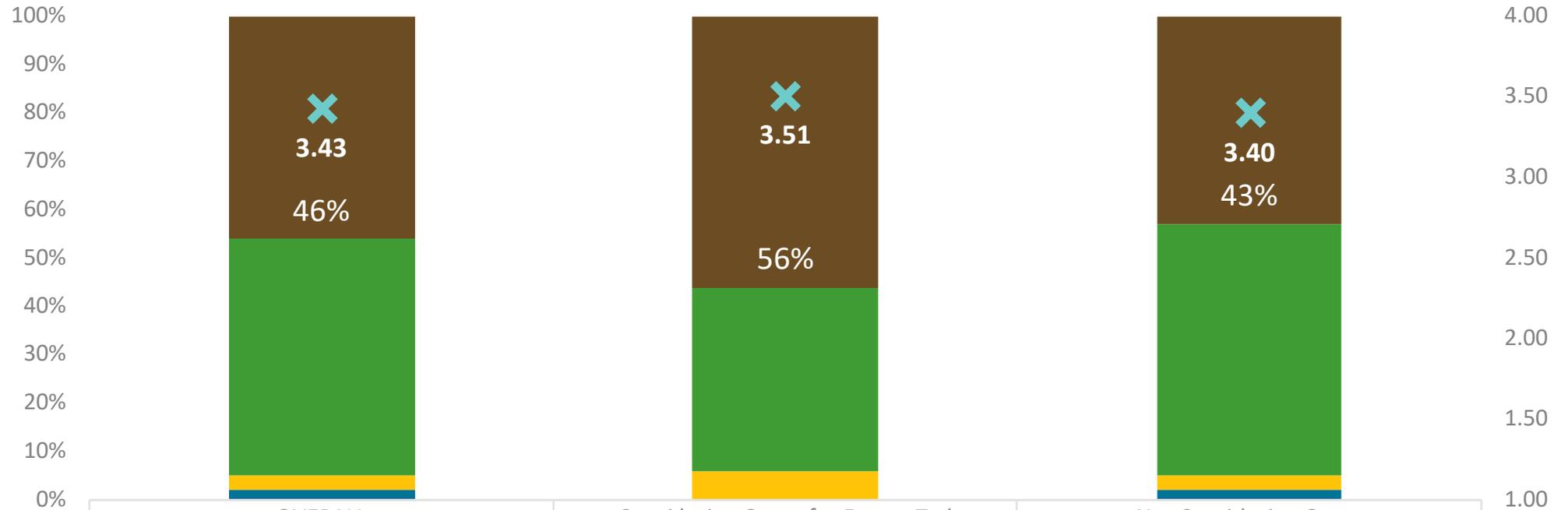
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	33%	37%	31%
Somewhat Good (3)	53%	56%	53%
Somewhat Poor (2)	9%	3%	11%
Very Poor (1)	0%	1%	
Don't know	5%	3%	5%
BASE	303	71	232
MEAN	3.24	3.32	3.22

Provides an escape from my everyday life



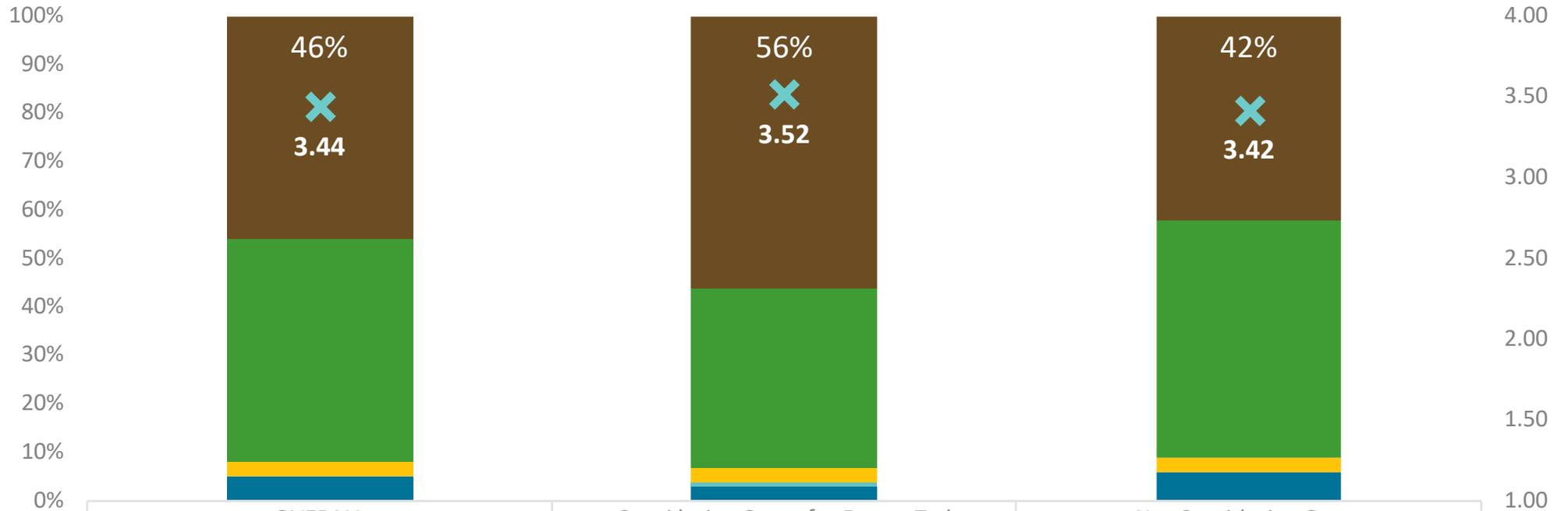
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	27%	32%	25%
Somewhat Good (3)	57%	56%	57%
Somewhat Poor (2)	11%	10%	12%
Very Poor (1)	1%		1%
Don't know	5%	1%	6%
BASE	303	71	232
MEAN	3.15	3.23	3.12

Can take part in nature-based activities



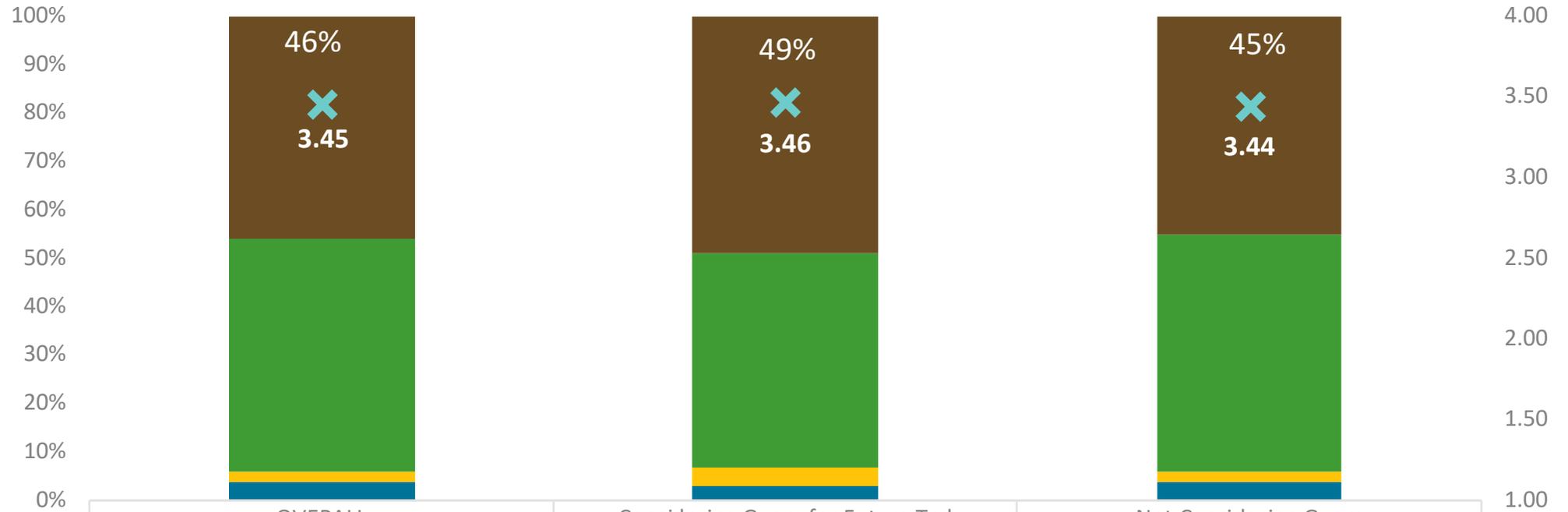
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	46%	56%	43%
Somewhat Good (3)	49%	38%	52%
Somewhat Poor (2)	3%	6%	3%
Very Poor (1)	0%		0%
Don't know	2%		2%
BASE	303	71	232
MEAN	3.43	3.51	3.40

Can try new foods and a different local cuisine



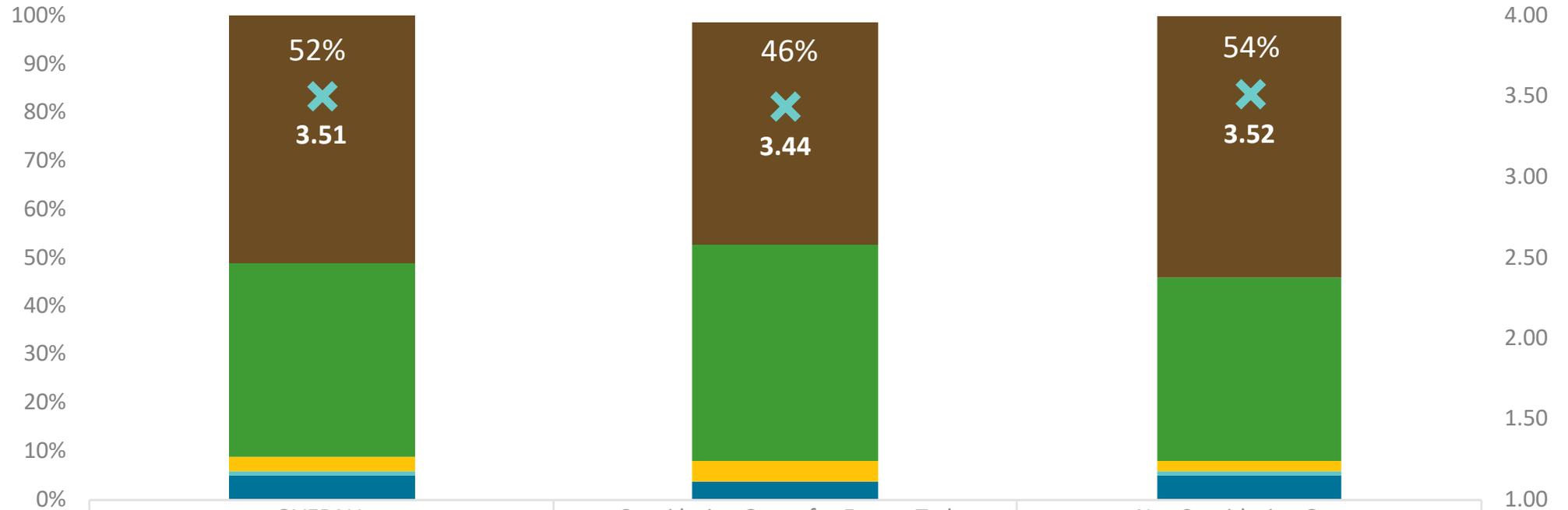
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	46%	56%	42%
Somewhat Good (3)	46%	37%	49%
Somewhat Poor (2)	3%	3%	3%
Very Poor (1)	0%	1%	
Don't know	5%	3%	6%
BASE	303	71	232
MEAN	3.44	3.52	3.42

Is a clean, well-maintained destination



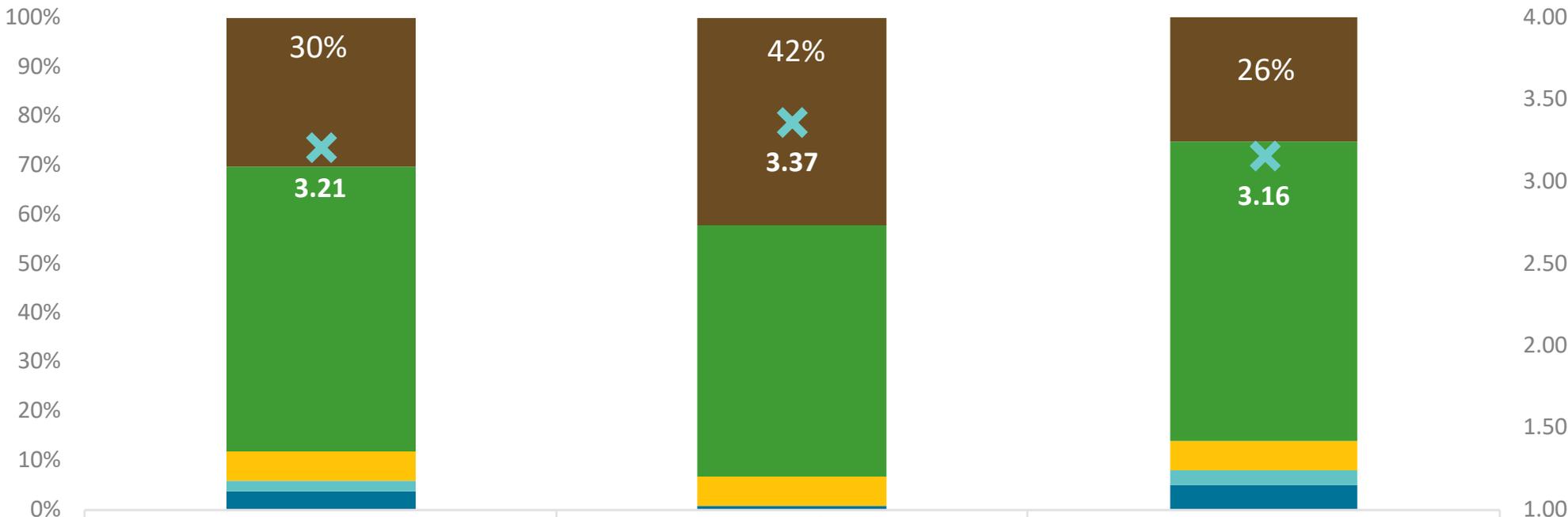
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	46%	49%	45%
Somewhat Good (3)	48%	44%	49%
Somewhat Poor (2)	2%	4%	2%
Very Poor (1)	0%		0%
Don't know	4%	3%	4%
BASE	303	71	232
MEAN	3.45	3.46	3.44

Is safe as far as health risks are concerned



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	52%	46%	54%
Somewhat Good (3)	40%	45%	38%
Somewhat Poor (2)	3%	4%	2%
Very Poor (1)	1%		1%
Don't know	5%	4%	5%
BASE	303	71	232
MEAN	3.51	3.44	3.52

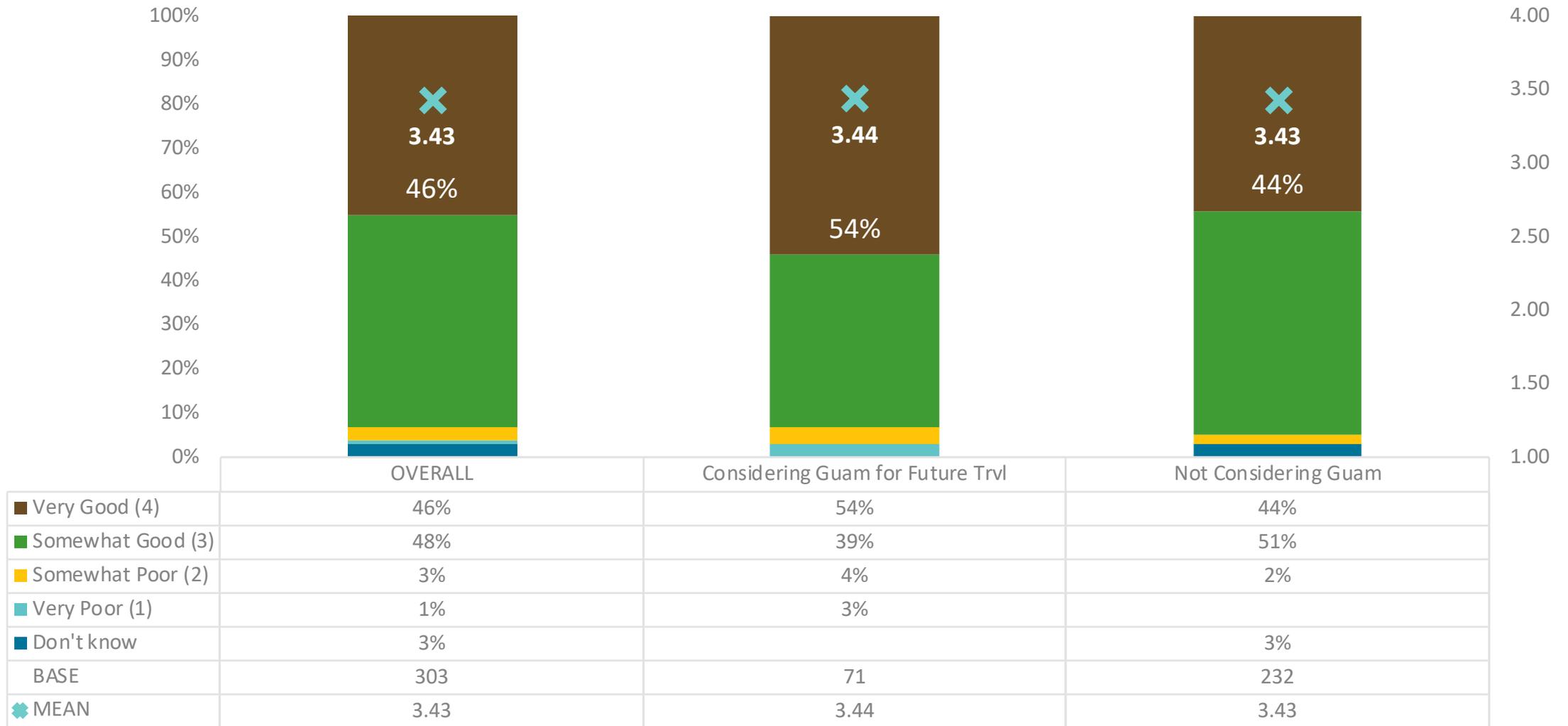
Is a destination that most people value and appreciate



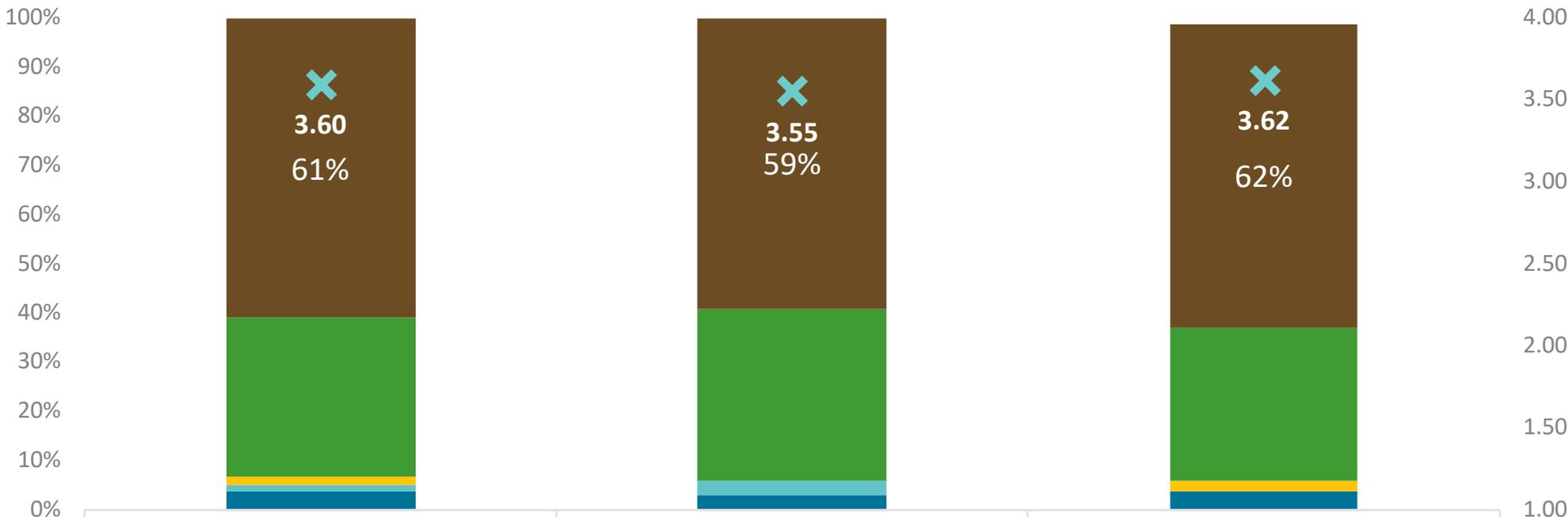
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	30%	42%	26%
Somewhat Good (3)	58%	51%	61%
Somewhat Poor (2)	6%	6%	6%
Very Poor (1)	2%		3%
Don't know	4%	1%	5%
BASE	303	71	232
MEAN	3.21	3.37	3.16



Has sightseeing and tours I can take part in



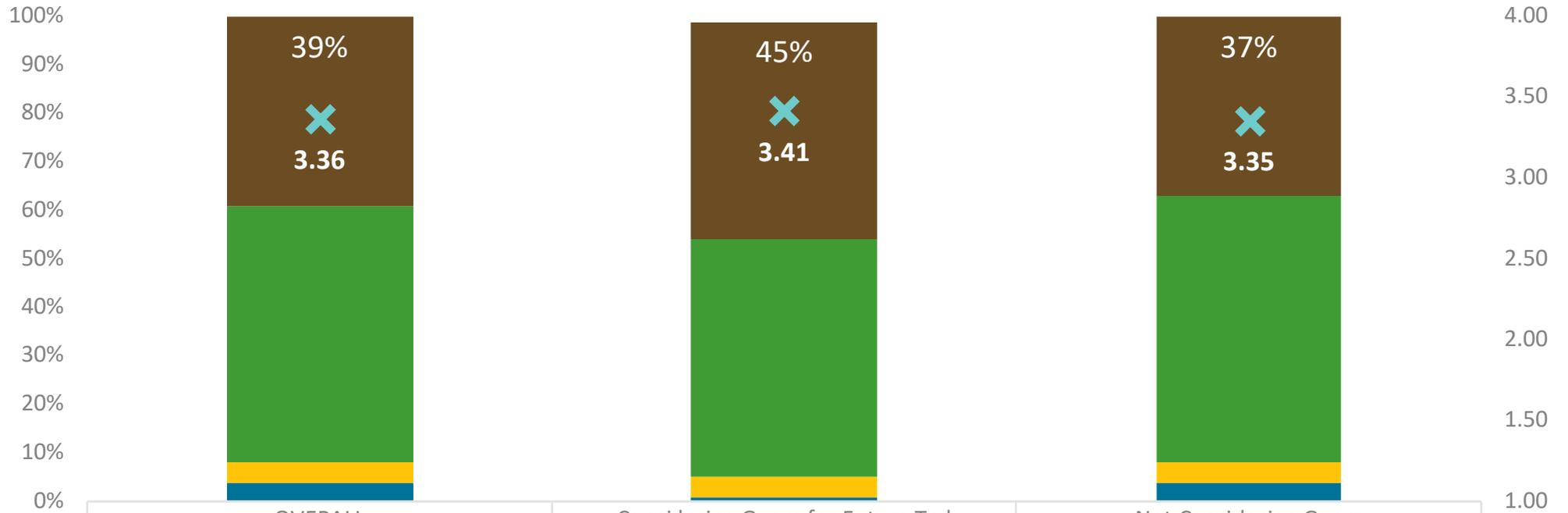
Has a reputation for controlling crime and being safe for visitors



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	61%	59%	62%
Somewhat Good (3)	32%	35%	31%
Somewhat Poor (2)	2%	0%	2%
Very Poor (1)	1%	3%	0%
Don't know	4%	3%	4%
BASE	303	71	232
MEAN	3.60	3.55	3.62

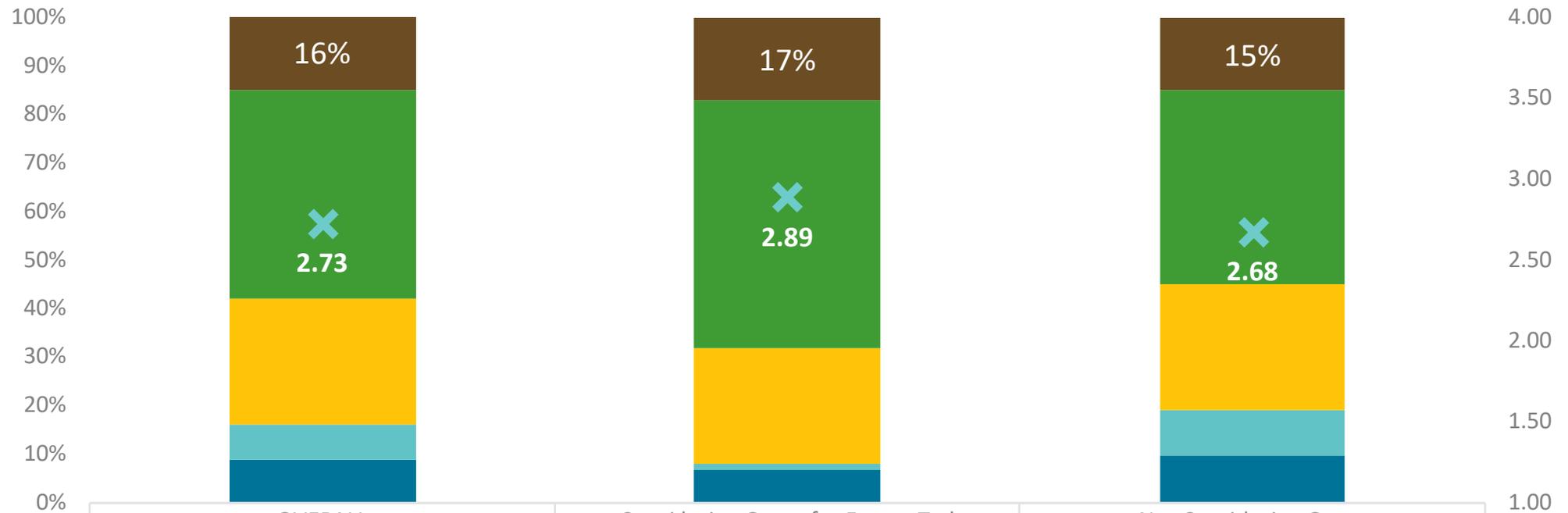


An opportunity to learn about a new place, its people and culture



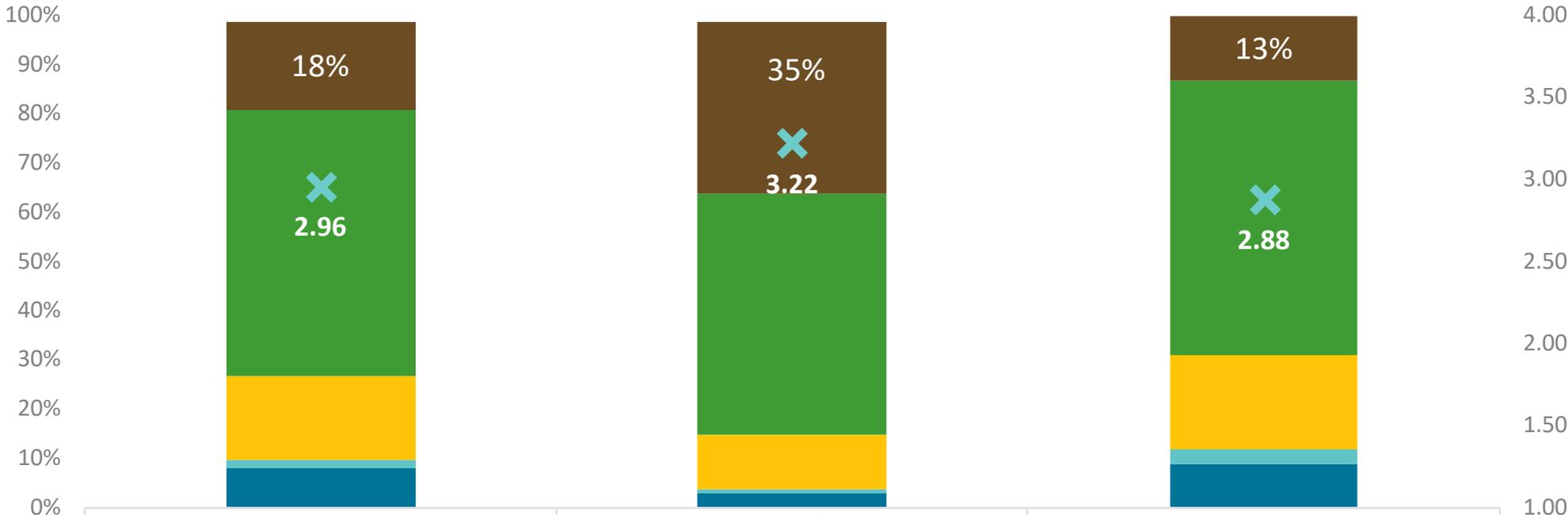
	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	39%	45%	37%
Somewhat Good (3)	53%	49%	55%
Somewhat Poor (2)	4%	4%	4%
Very Poor (1)			
Don't know	4%	1%	4%
BASE	303	71	232
MEAN	3.36	3.41	3.35

Can take part in activities that offer adventure



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	16%	17%	15%
Somewhat Good (3)	43%	51%	40%
Somewhat Poor (2)	26%	24%	26%
Very Poor (1)	7%	1%	9%
Don't know	9%	7%	10%
BASE	303	71	232
MEAN	2.73	2.89	2.68

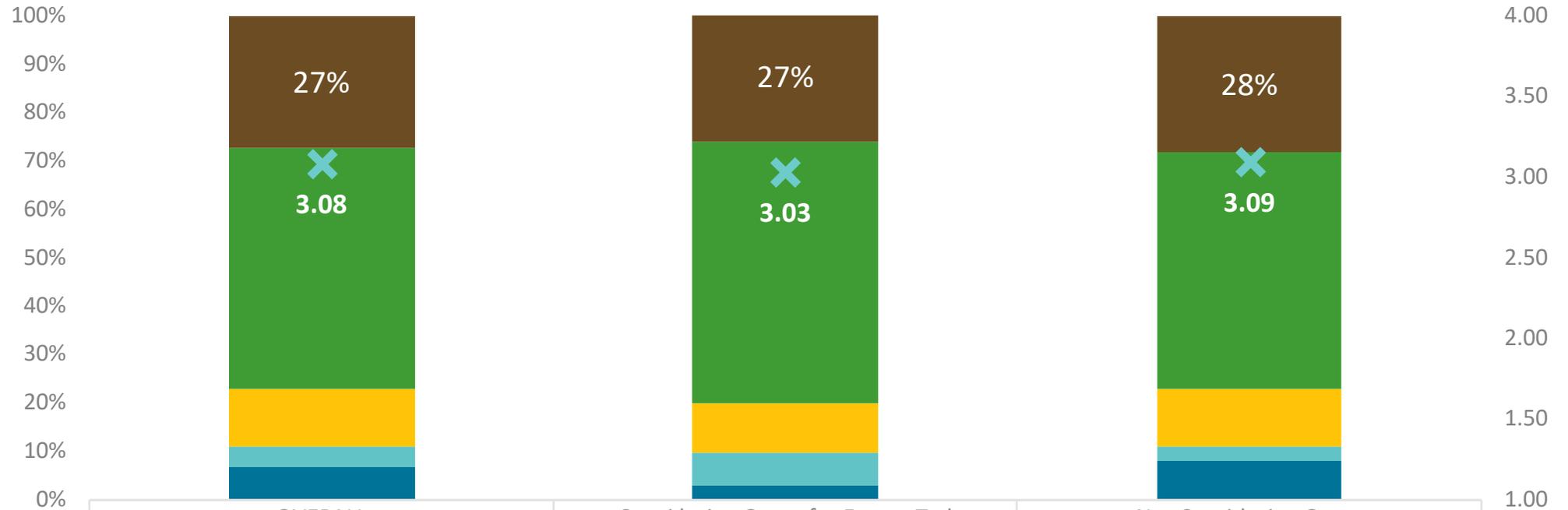
An opportunity to meet new and interesting people



	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	18%	35%	13%
Somewhat Good (3)	54%	49%	56%
Somewhat Poor (2)	17%	11%	19%
Very Poor (1)	2%	1%	3%
Don't know	8%	3%	9%
BASE	303	71	232
MEAN	2.96	3.22	2.88



Has excellent shopping in venues

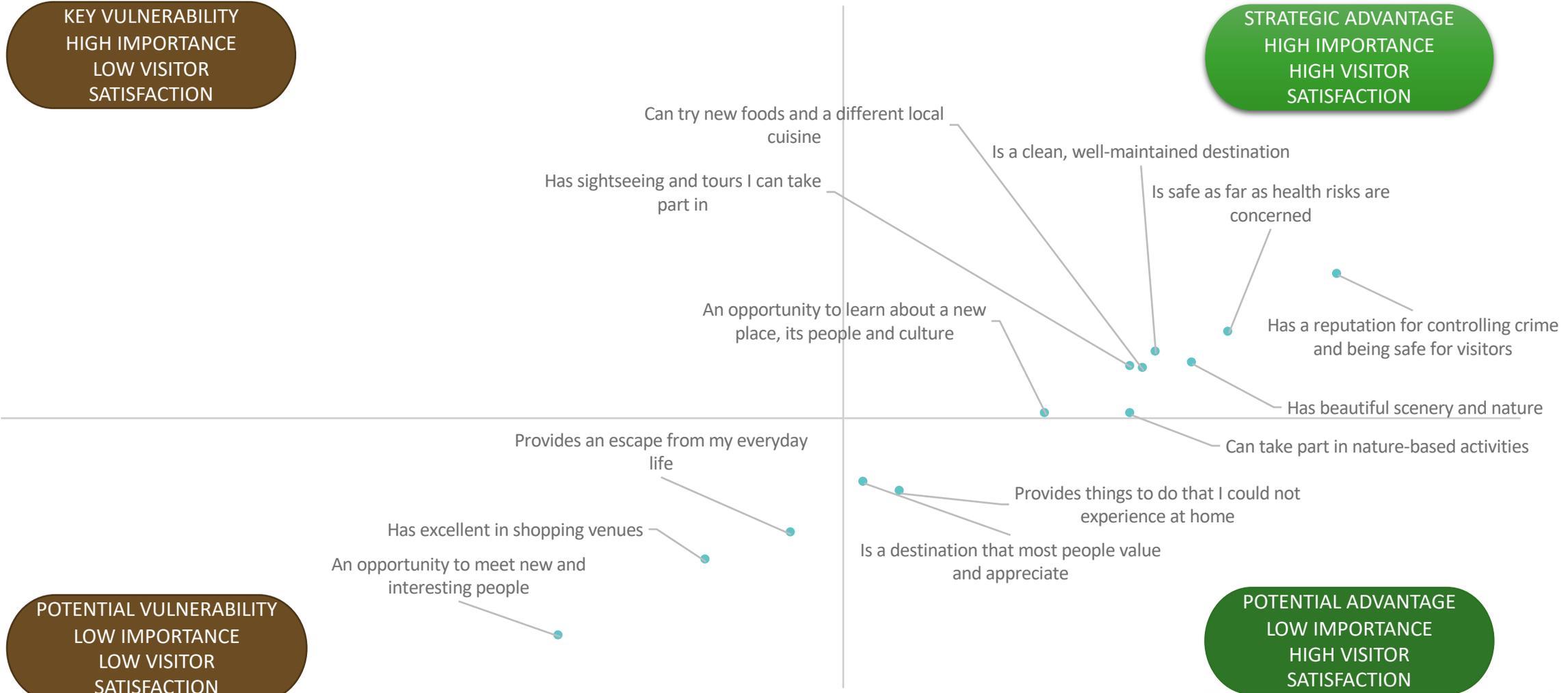


	OVERALL	Considering Guam for Future Trvl	Not Considering Guam
Very Good (4)	27%	27%	28%
Somewhat Good (3)	50%	54%	49%
Somewhat Poor (2)	12%	10%	12%
Very Poor (1)	4%	7%	3%
Don't know	7%	3%	8%
BASE	303	71	232
MEAN	3.08	3.03	3.09

NEED-GAP ANALYSIS

KEY VULNERABILITY
HIGH IMPORTANCE
LOW VISITOR
SATISFACTION

STRATEGIC ADVANTAGE
HIGH IMPORTANCE
HIGH VISITOR
SATISFACTION



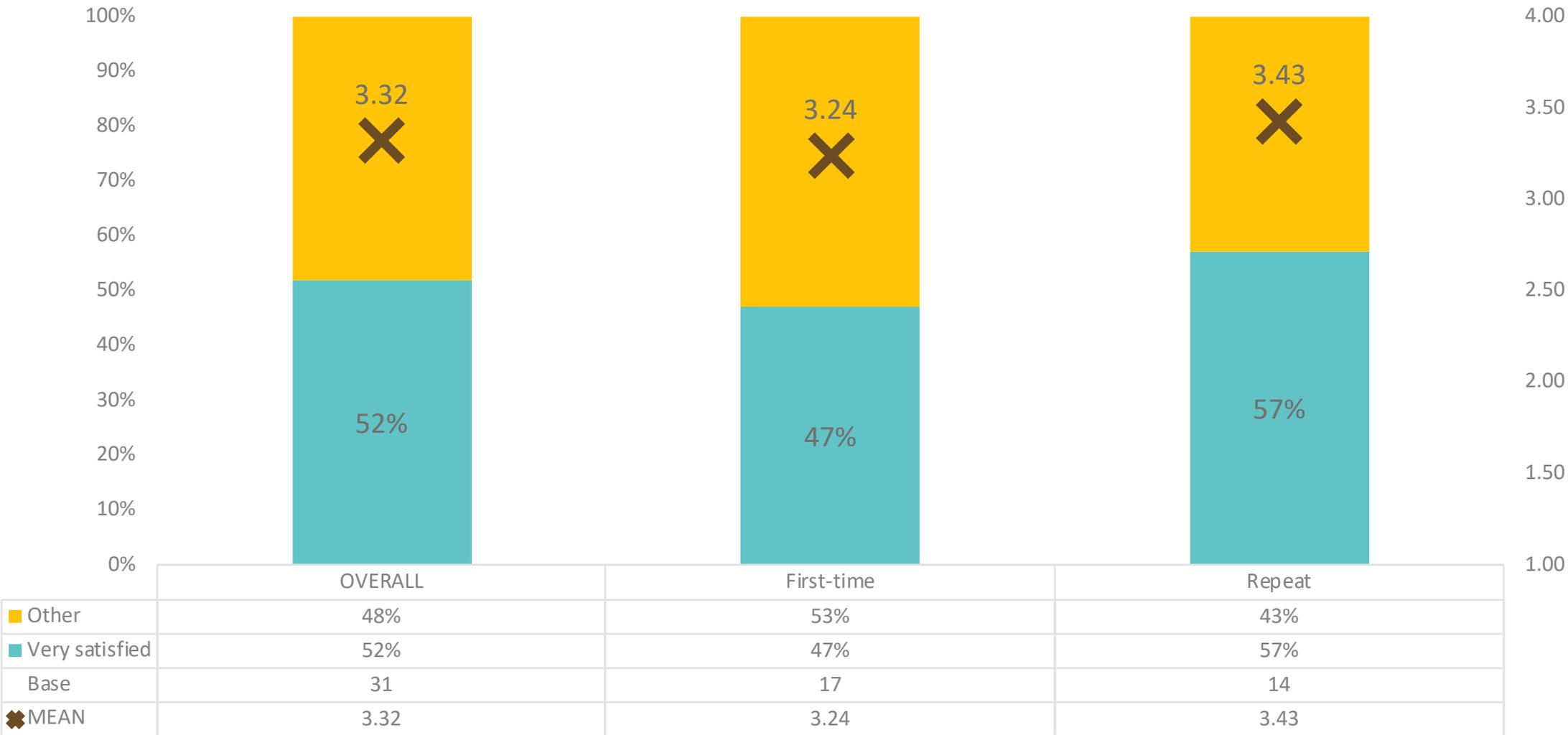
POTENTIAL VULNERABILITY
LOW IMPORTANCE
LOW VISITOR
SATISFACTION

POTENTIAL ADVANTAGE
LOW IMPORTANCE
HIGH VISITOR
SATISFACTION



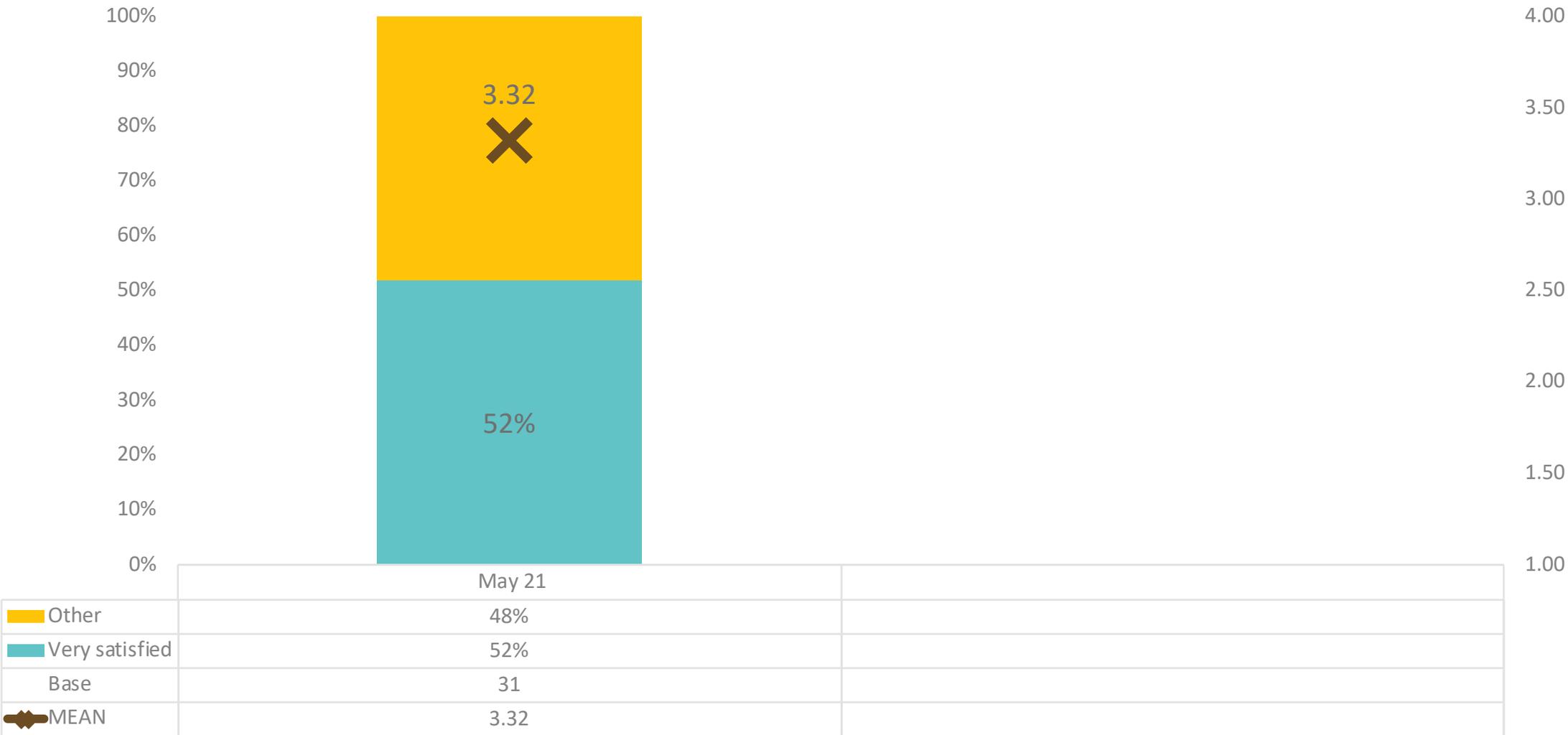
ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE



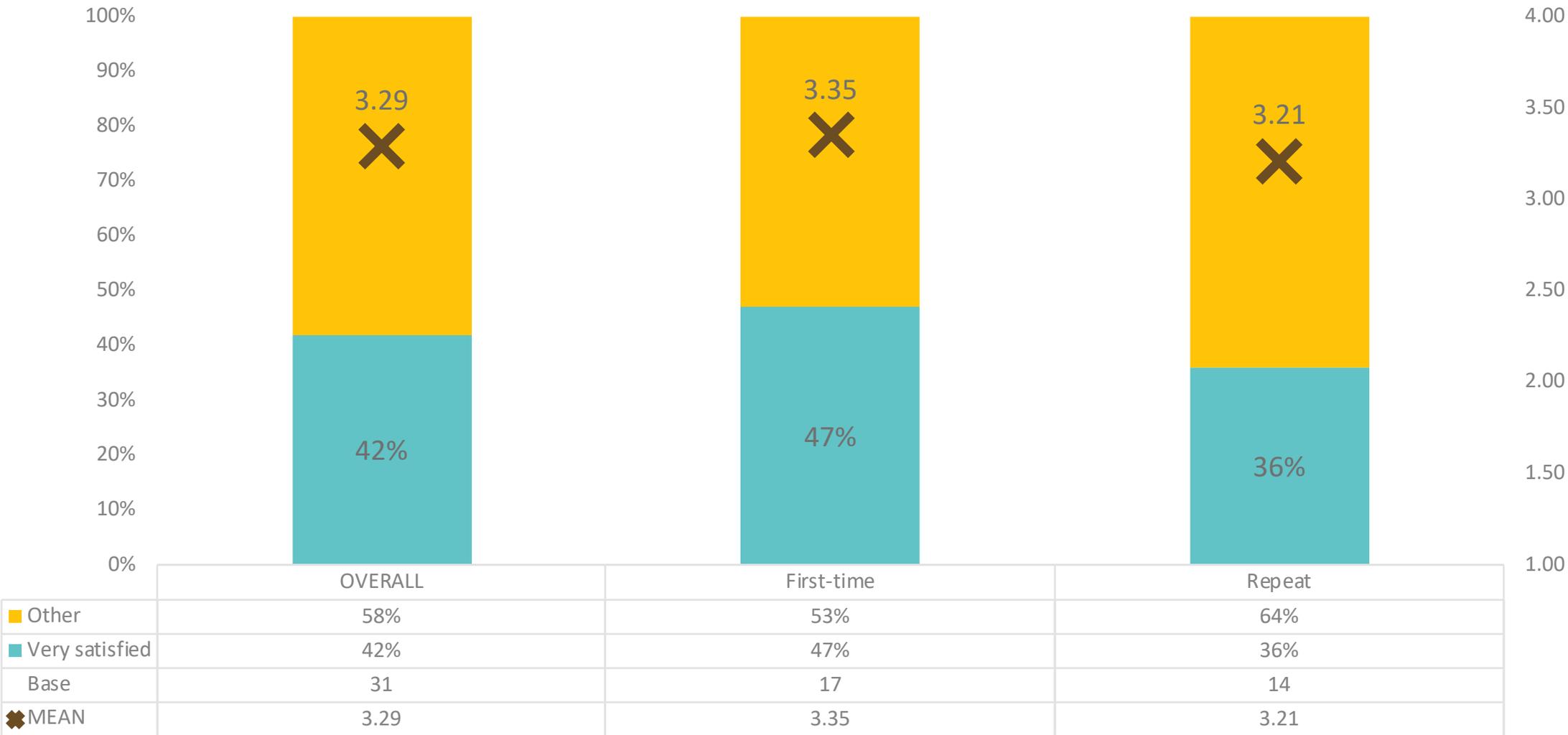
ACCOMMODATIONS – SATISFACTION

4PT RATING SCALE – TRACKING



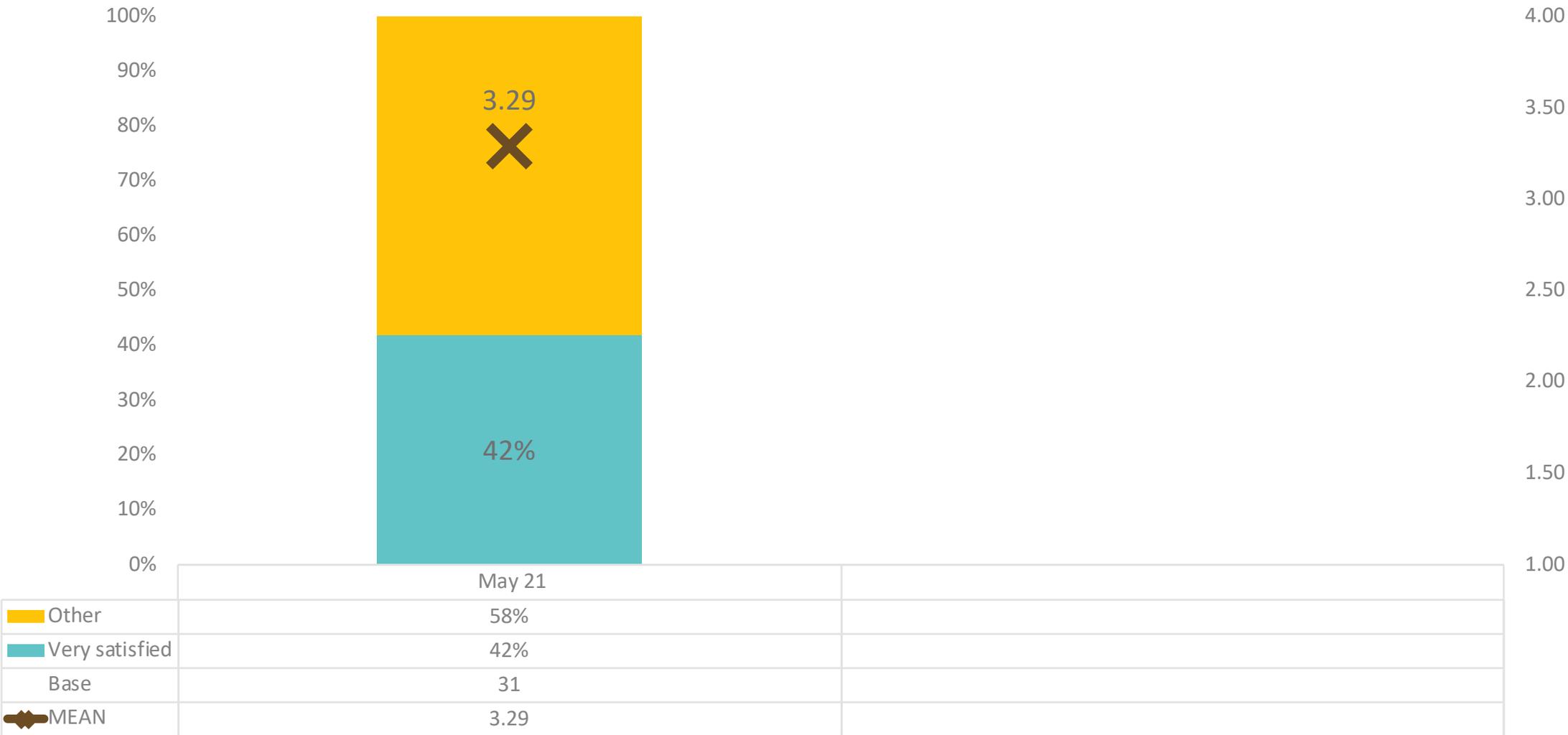
QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE



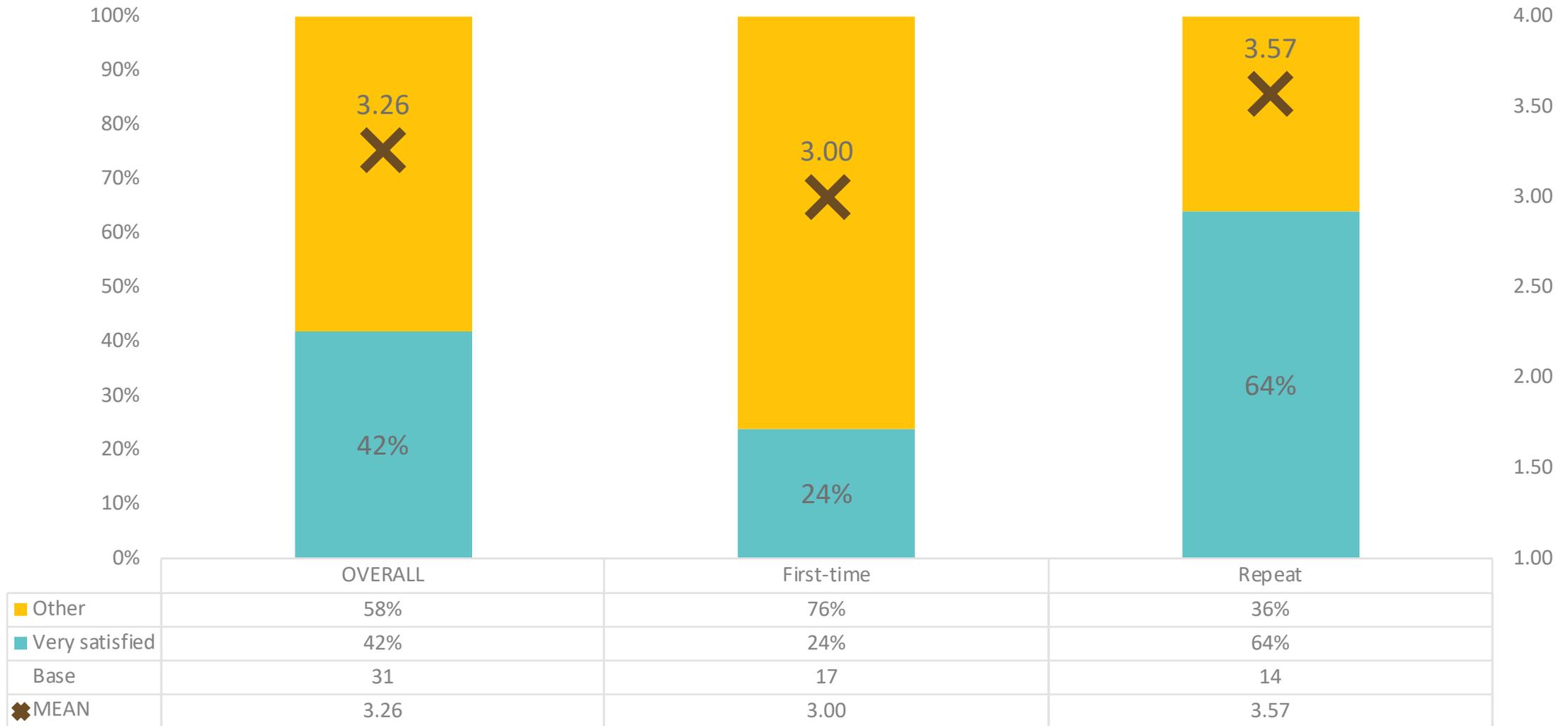
QUALITY CUSTOMER SERVICE – SATISFACTION

4PT RATING SCALE – TRACKING



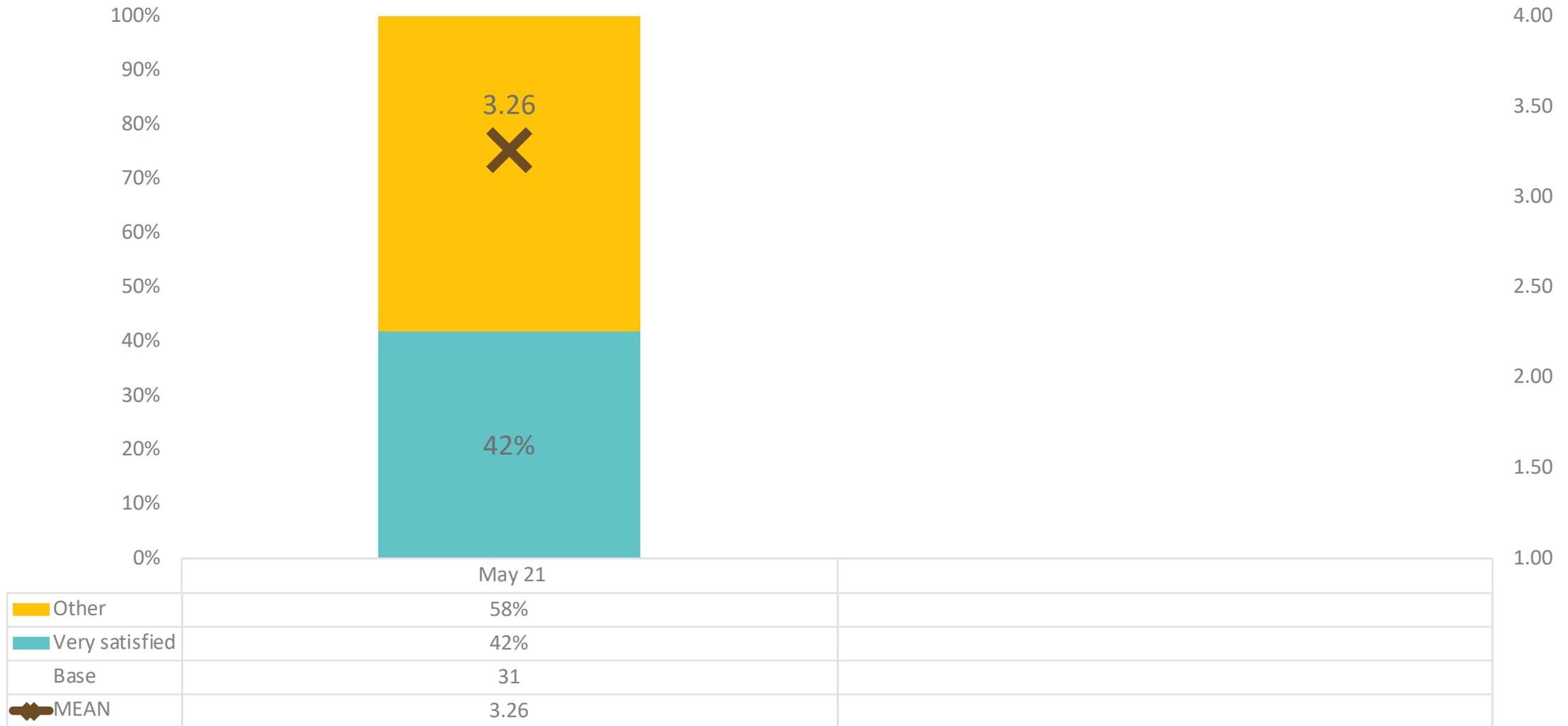
TRANSPORTATION OPTIONS – SATISFACTION

4PT RATING SCALE



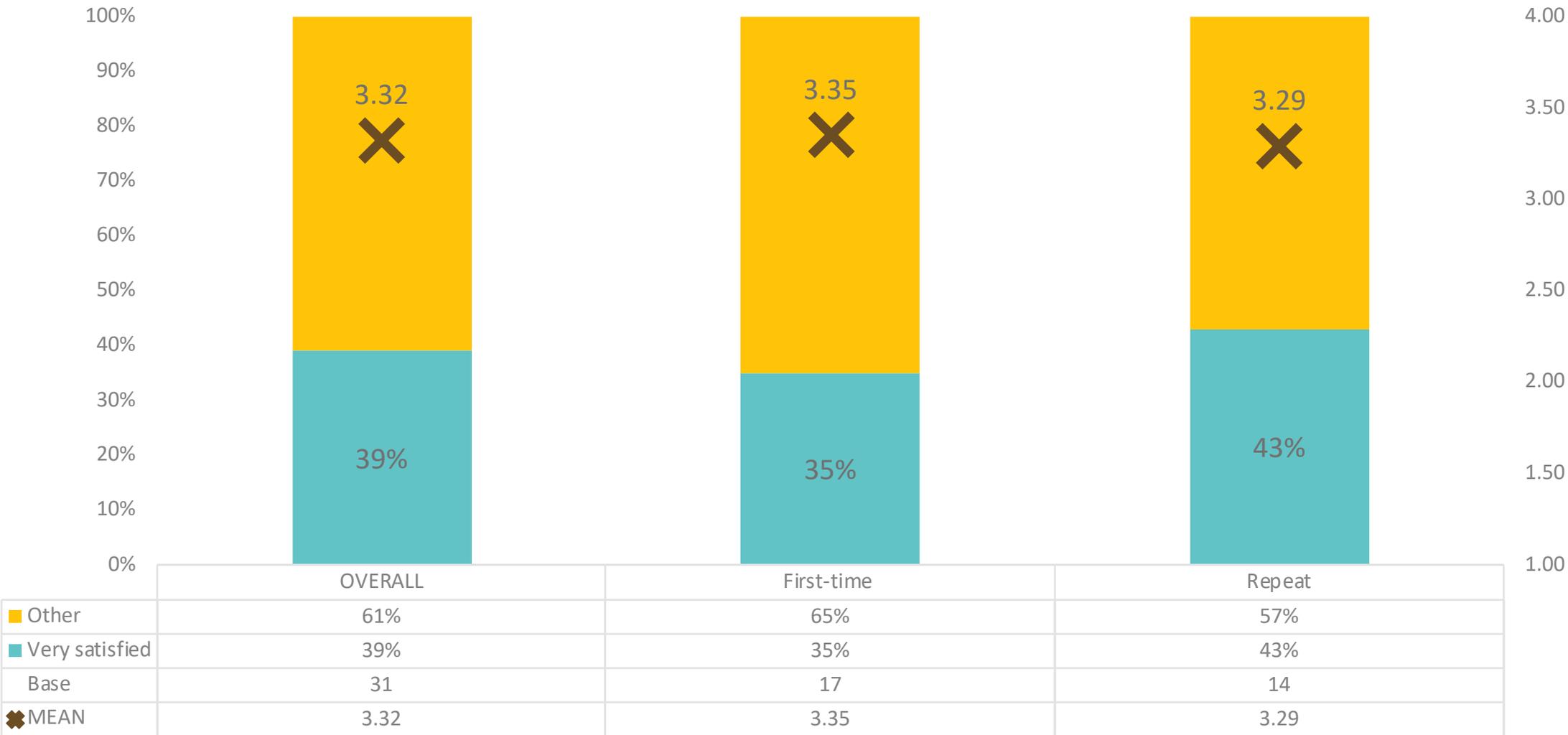
TRANSPORTATION OPTIONS – SATISFACTION

4PT RATING SCALE – TRACKING

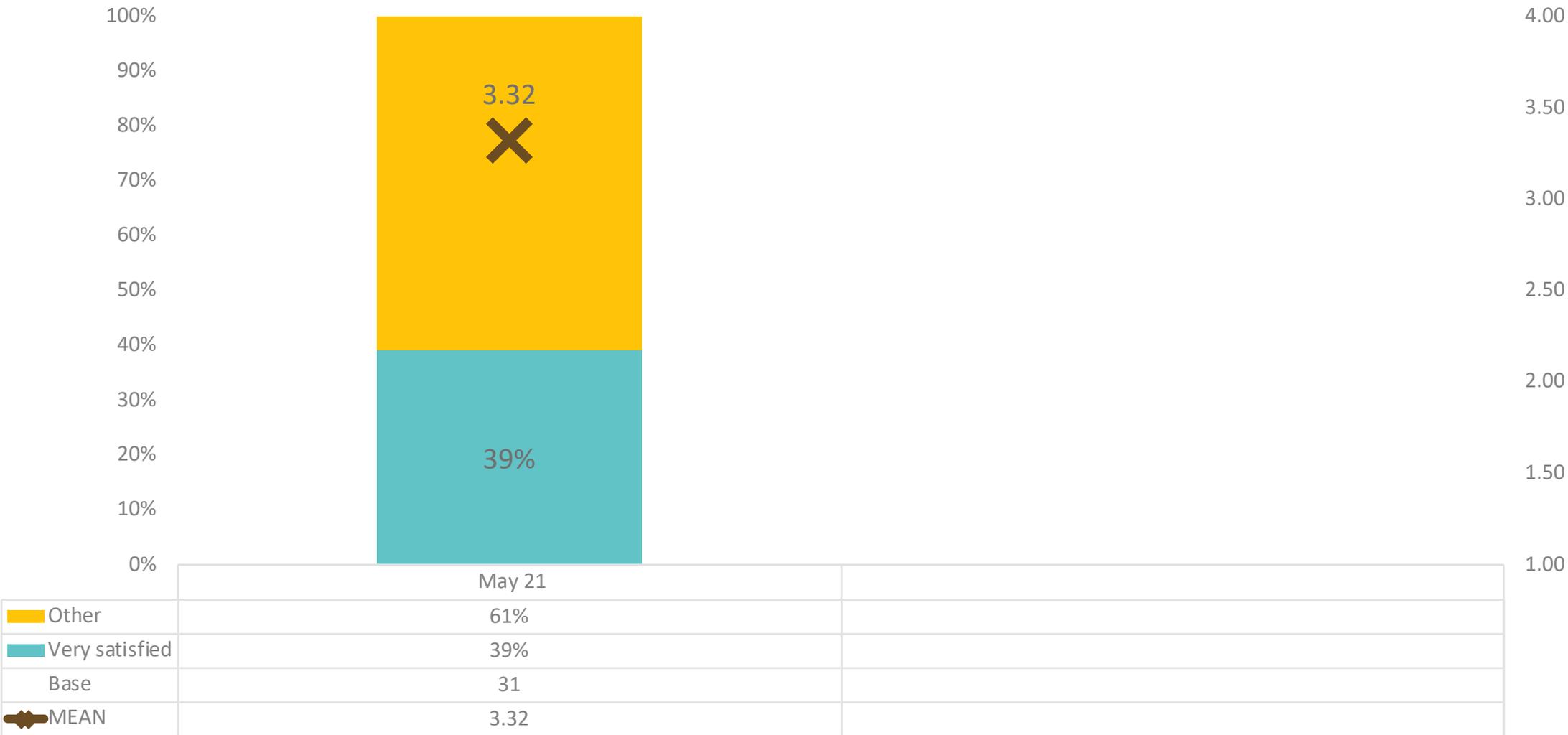


VISITORS FEEL WELCOME – SATISFACTION

4PT RATING SCALE

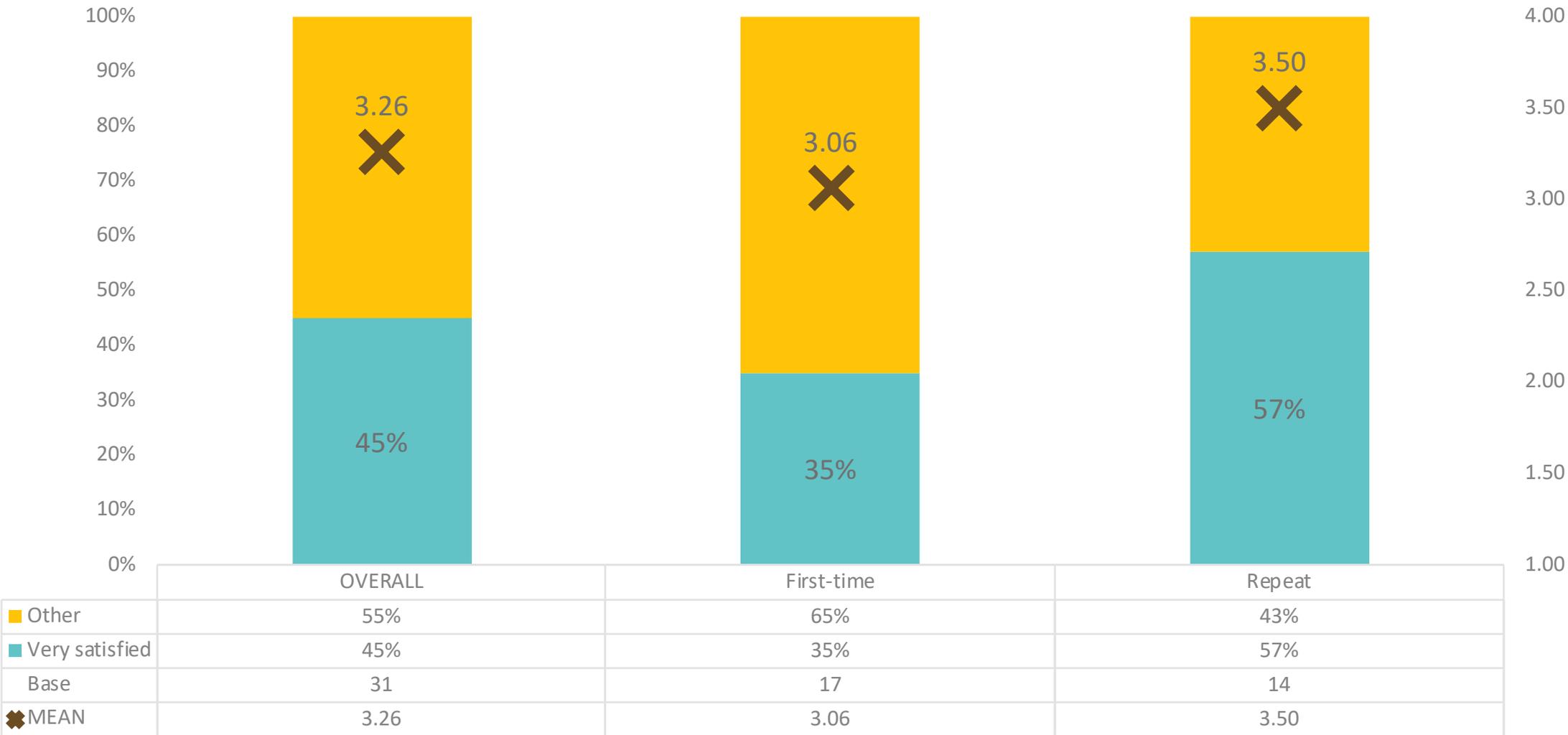


VISITORS FEEL WELCOME – SATISFACTION 4PT RATING SCALE – TRACKING



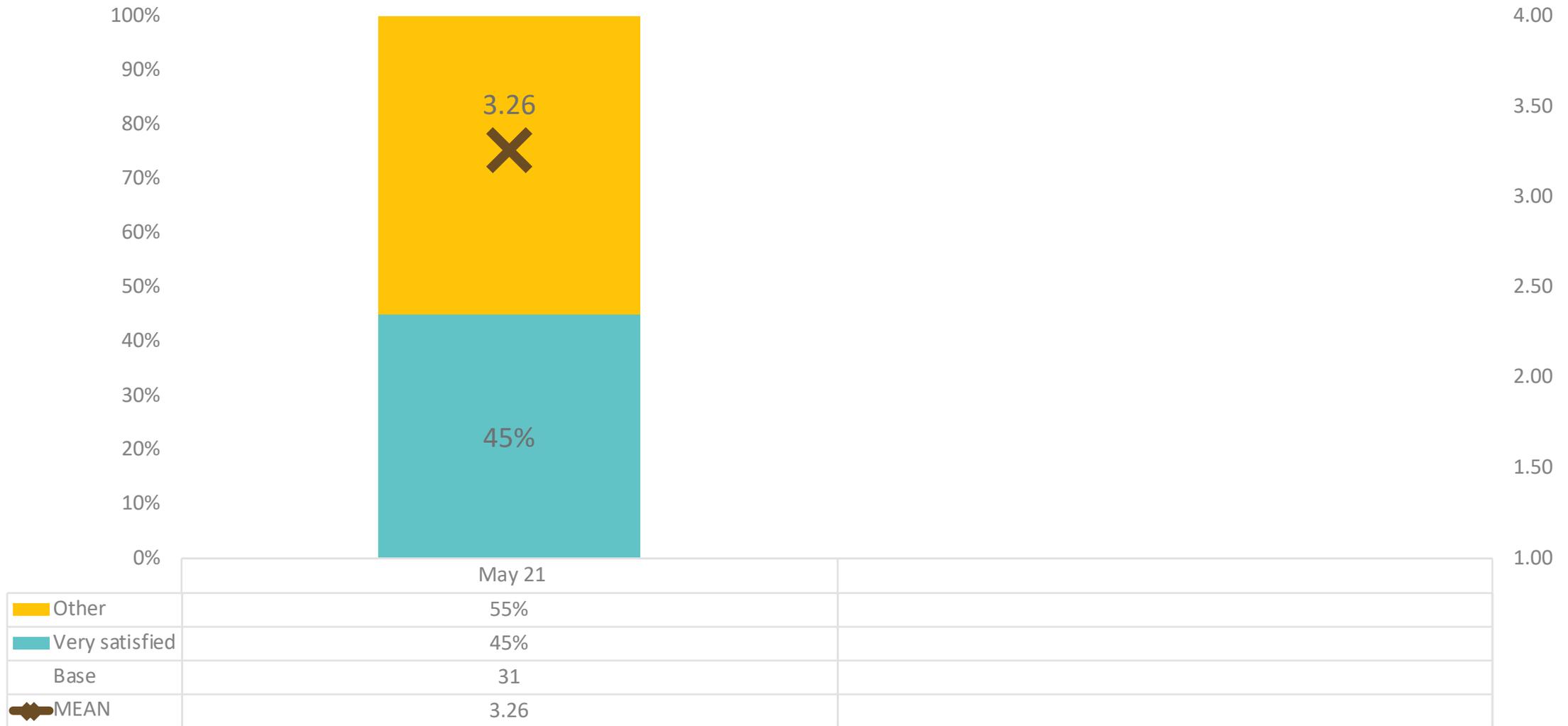
VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE



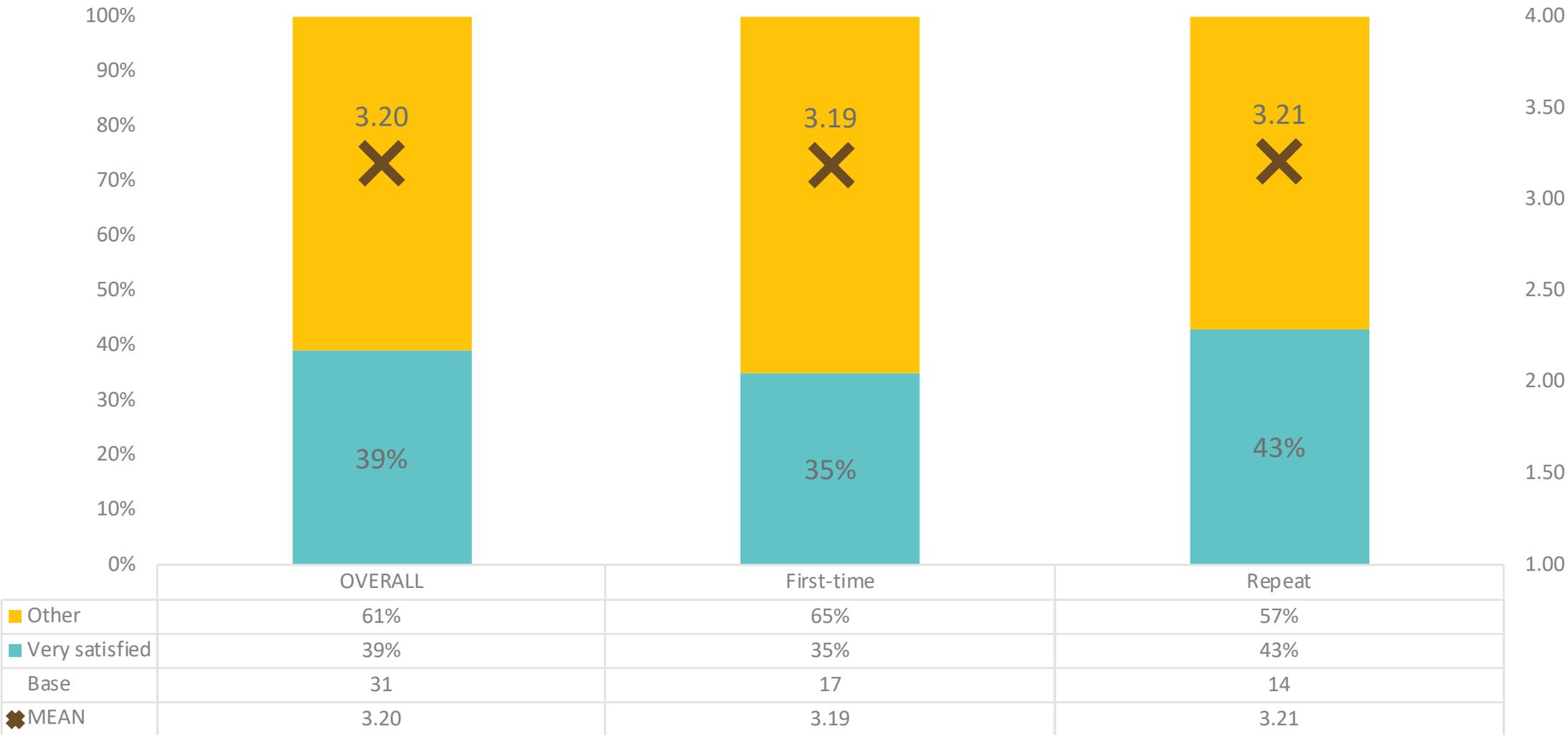
VARIETY OF ACTIVITIES – SATISFACTION

4PT RATING SCALE – TRACKING



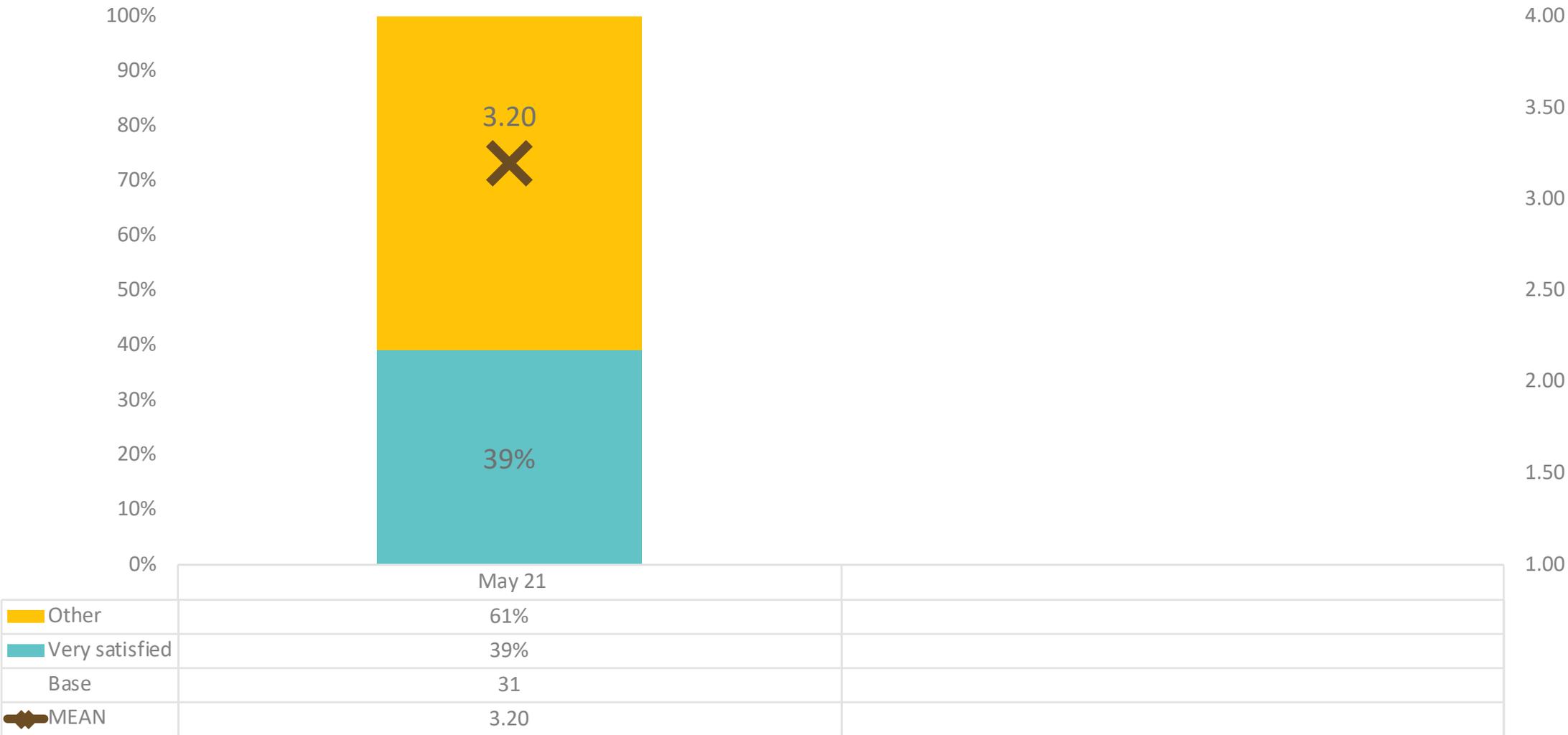
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE



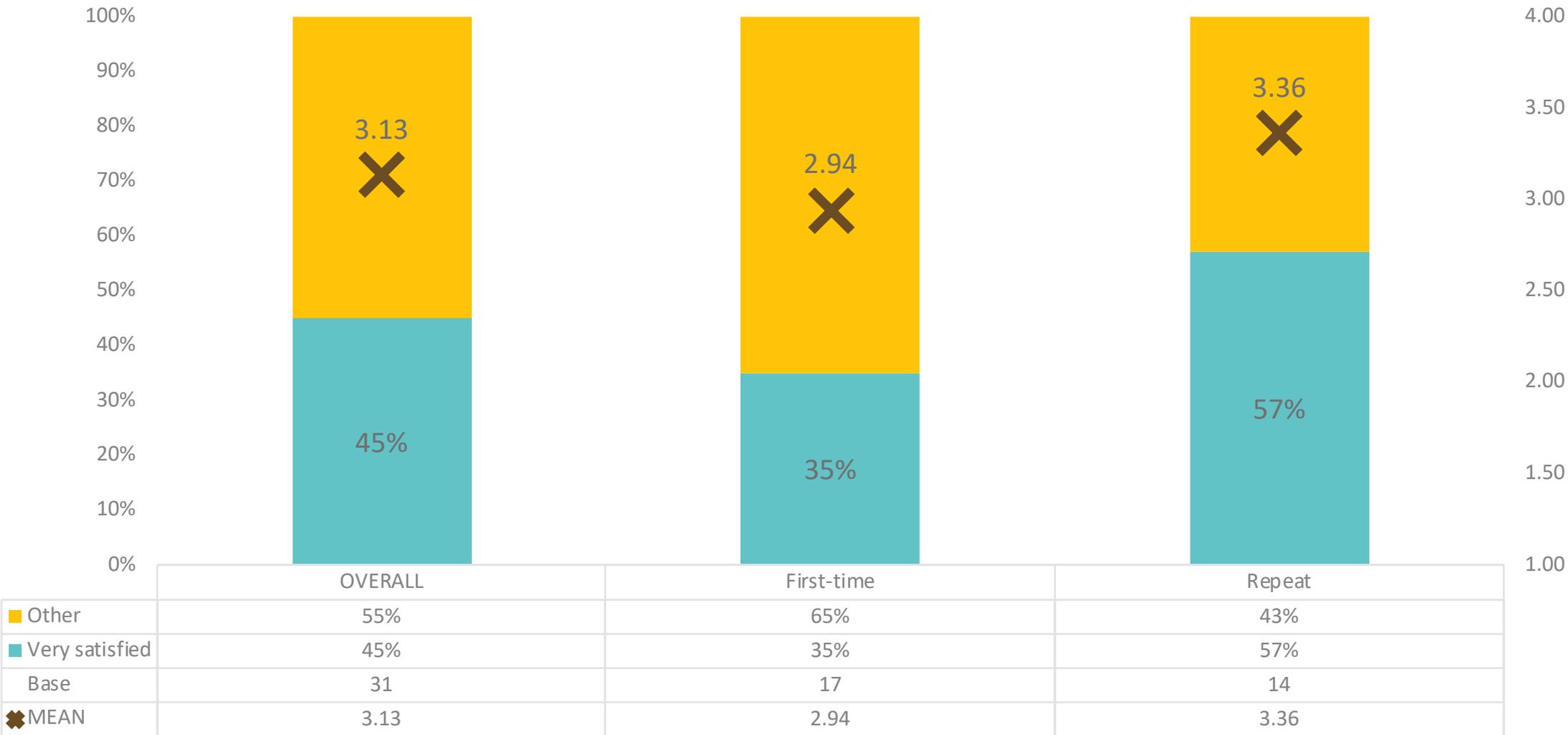
SHOPPING OPTIONS – SATISFACTION

4PT RATING SCALE – TRACKING



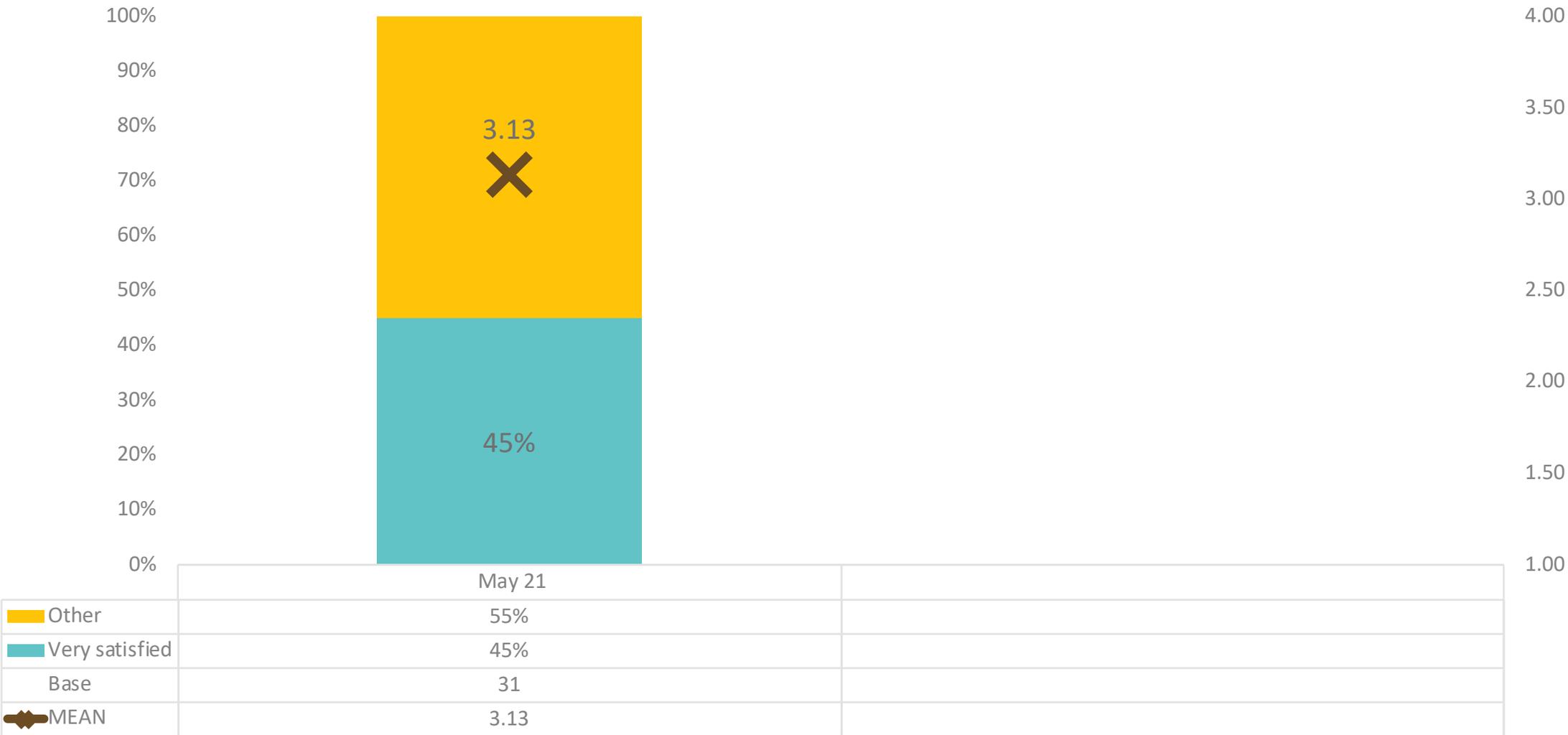
OVERALL VALUE – SATISFACTION

4PT RATING SCALE



OVERALL VALUE – SATISFACTION

4PT RATING SCALE – TRACKING





SECTION 4

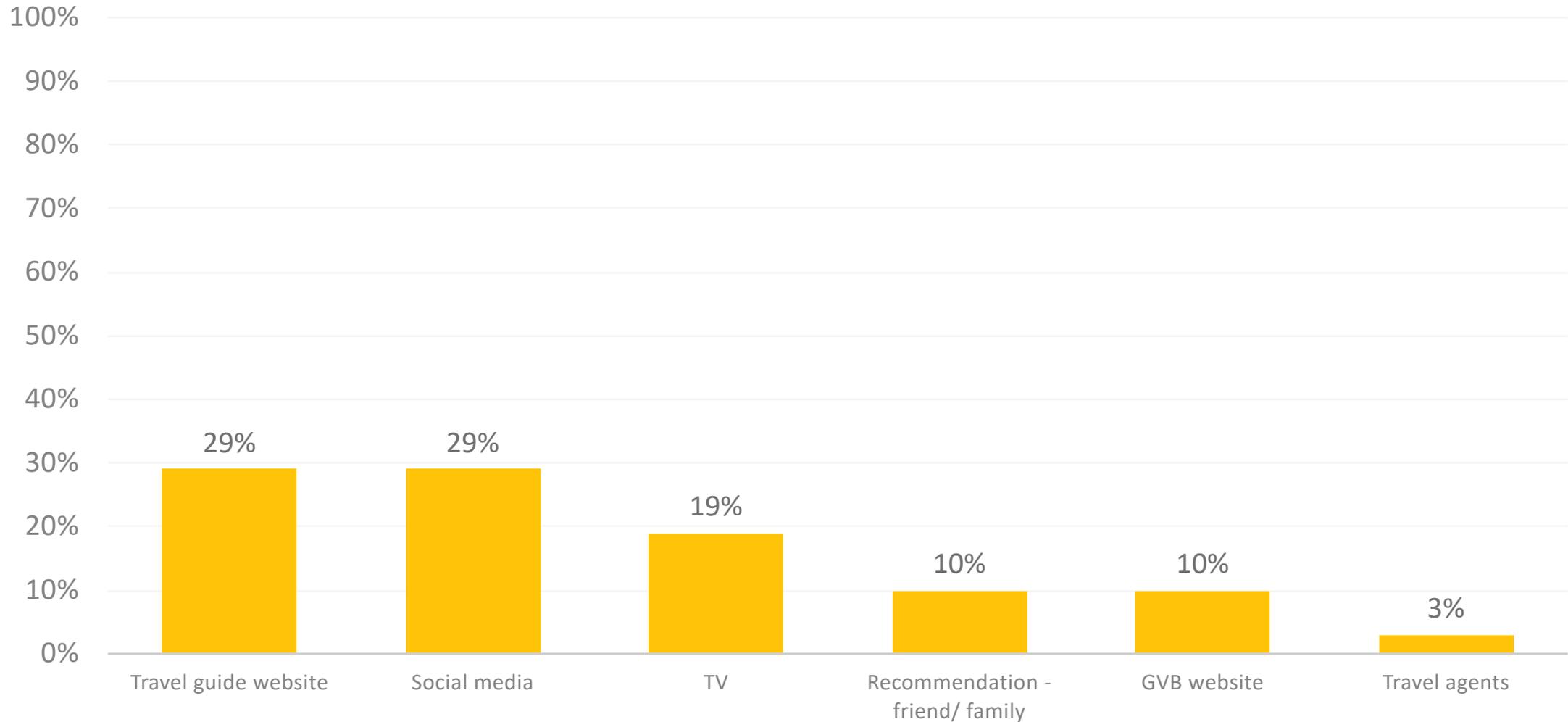
MARKETING & COMMUNICATIONS



AIDED ADVERTISING AWARENESS



SOURCES OF INFORMATION ABOUT GUAM





SECTION 5

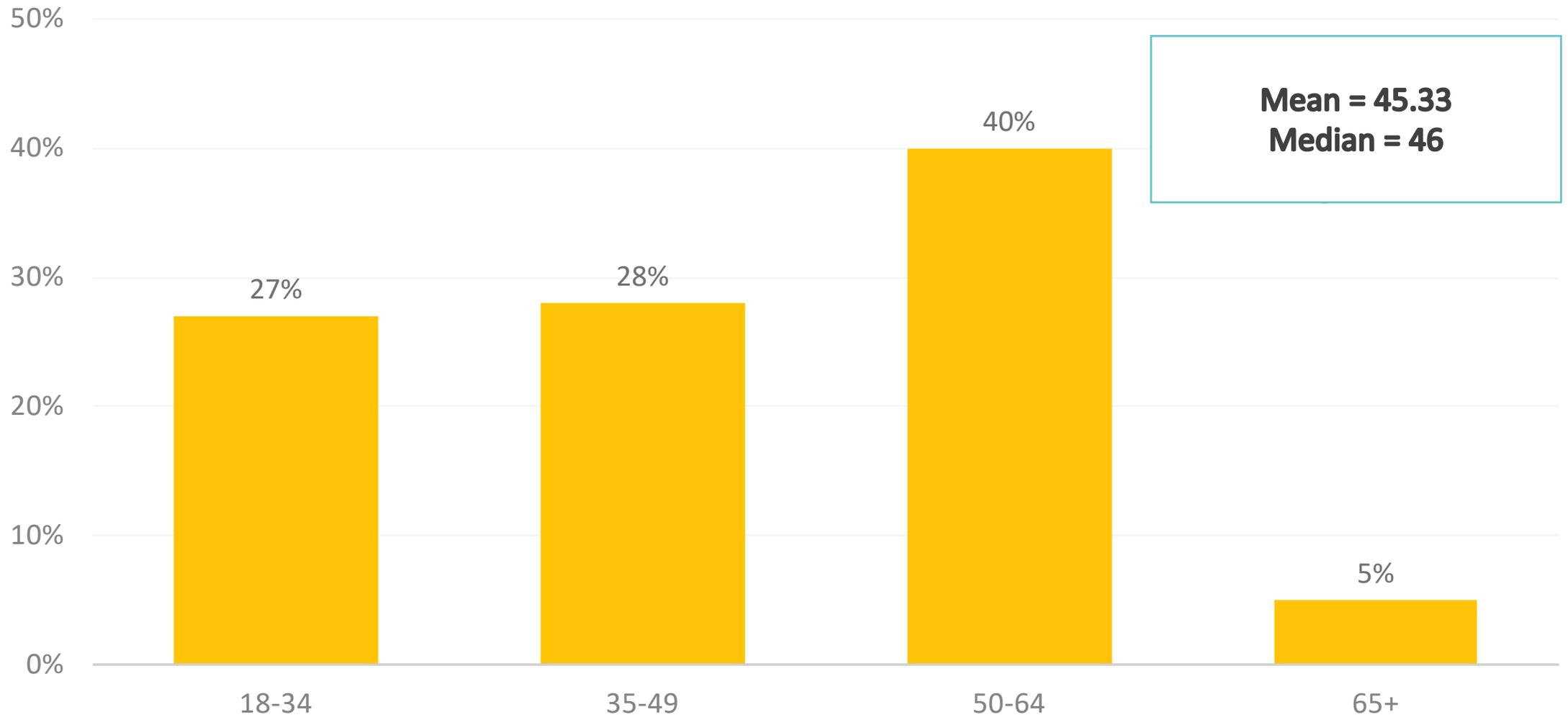
PROFILE OF RESPONDENTS



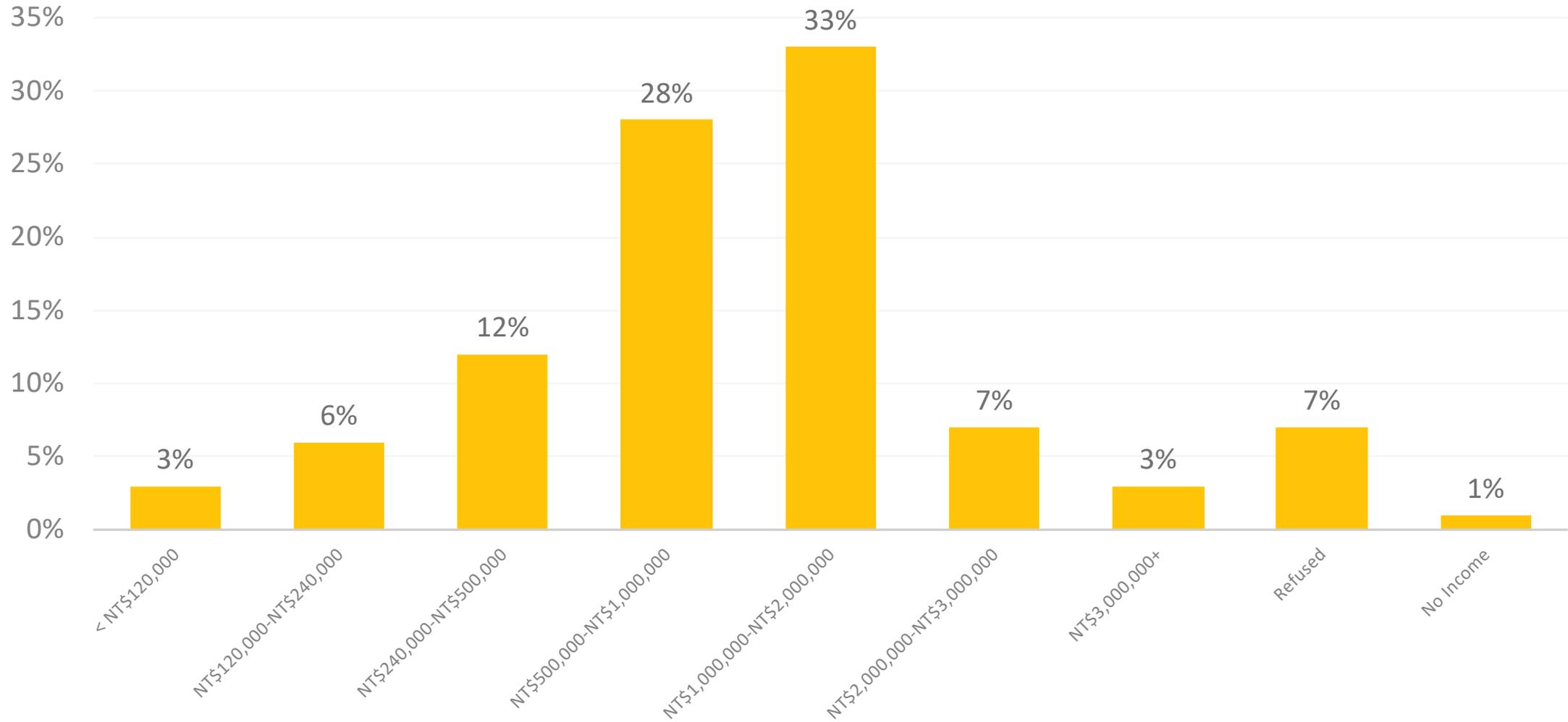
GENDER



AGE



HOUSEHOLD INCOME

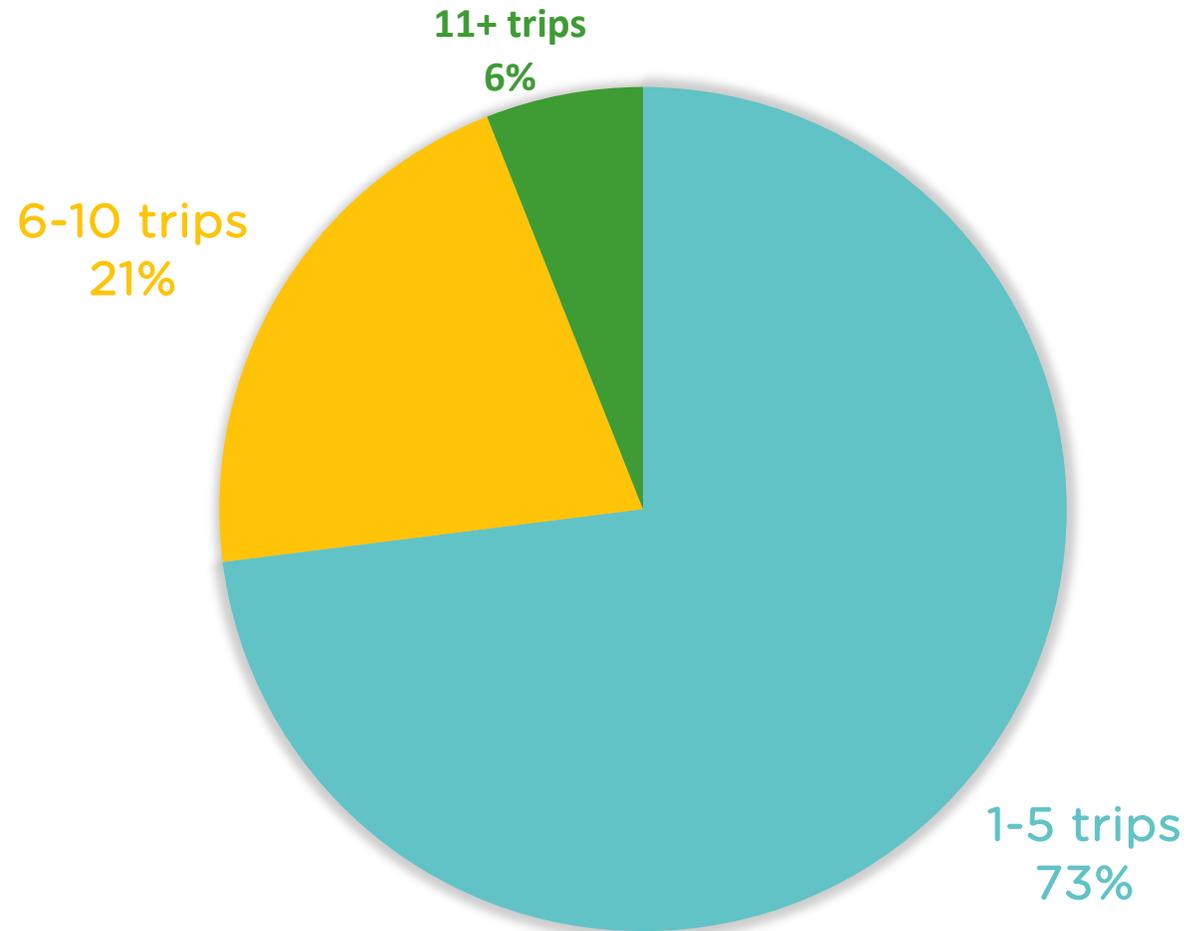


TRIPS TO GUAM



Mean = 1.97
Median = 1

INTERNATIONAL TRAVEL



Mean = 4.44
Median = 3