



Guam Visitors Bureau

Korea In-Market Insight Report

MAY 2022

[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 internationally 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 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 any reason, in the last three years (since the start of 2019) or intend to travel internationally for any reason in the next five years.
- This report includes results from the survey, conducted April 21-27, 2022. A total of 357 surveys were collected during this period.
- The margin of error for a sample of 357 is +/- 5.19 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 +/- 5.19 percentage points.



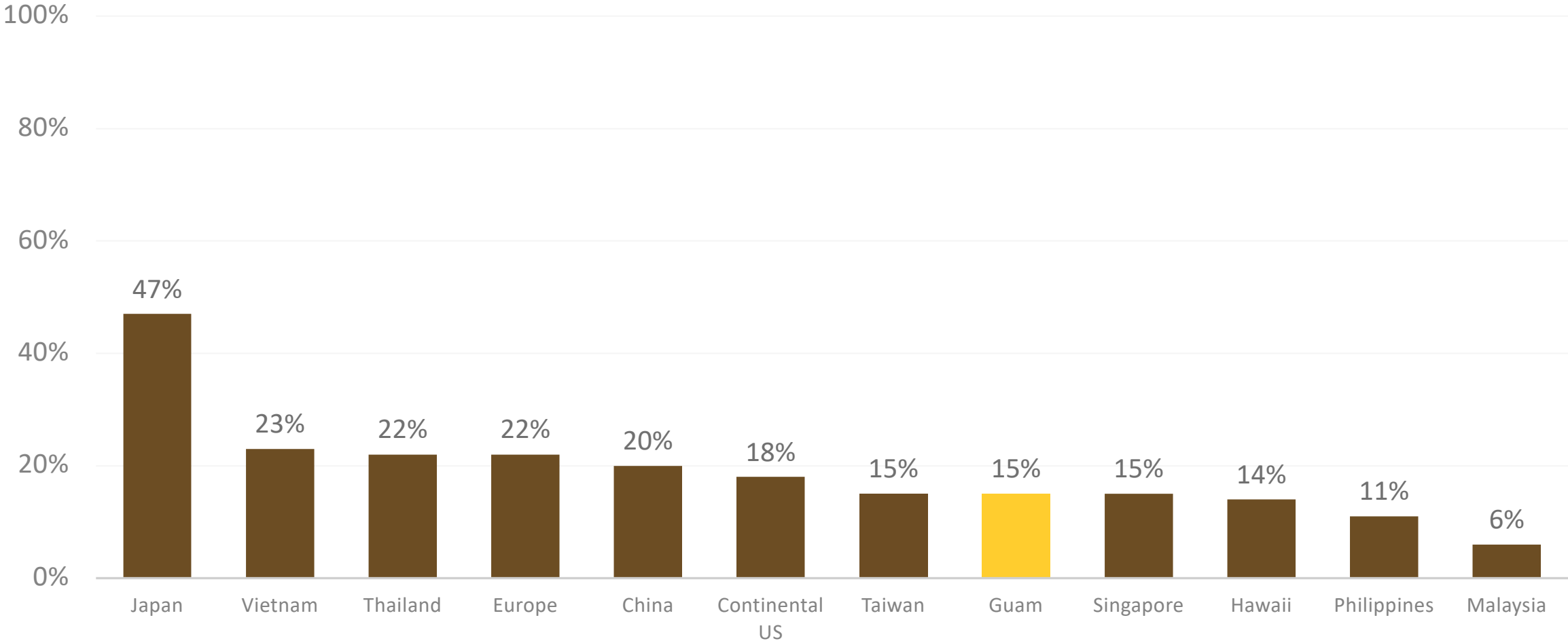


SECTION 1

TRAVEL PLANNING



TRAVEL HISTORY



TRAVEL HISTORY – Tracking

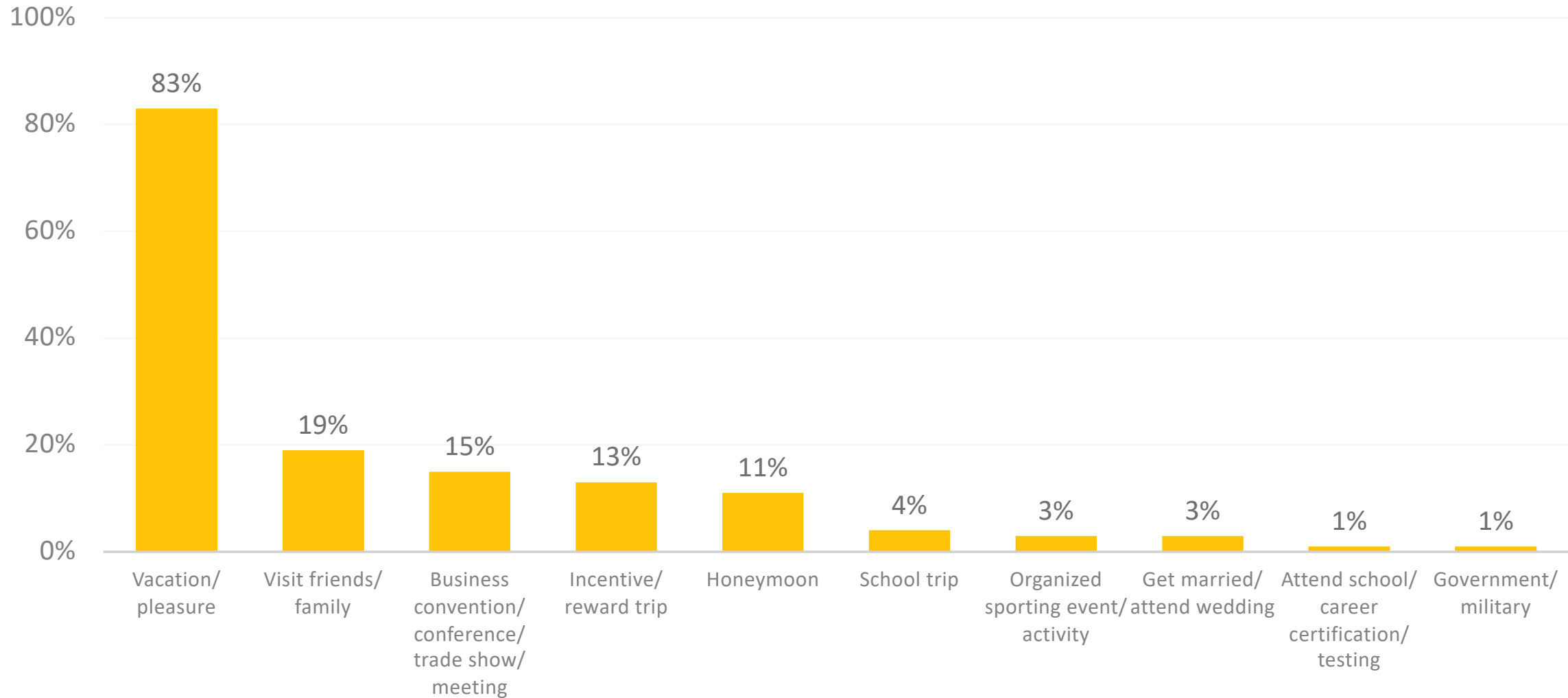
	May 2021	June 2021	Sept 2021	May 2022*
Japan	55%	50%	50%	47%
Thailand	20%	16%	24%	22%
China	26%	25%	22%	20%
Vietnam	22%	25%	21%	23%
Europe	25%	20%	20%	22%
Taiwan	18%	13%	18%	15%
Guam	15%	13%	16%	15%
Philippines	12%	11%	14%	11%
Continental U.S.	22%	15%	13%	18%
Singapore	17%	13%	13%	15%
Hawaii	13%	11%	9%	14%

Q: To what international destinations have you traveled, for any reason, in the last five years?

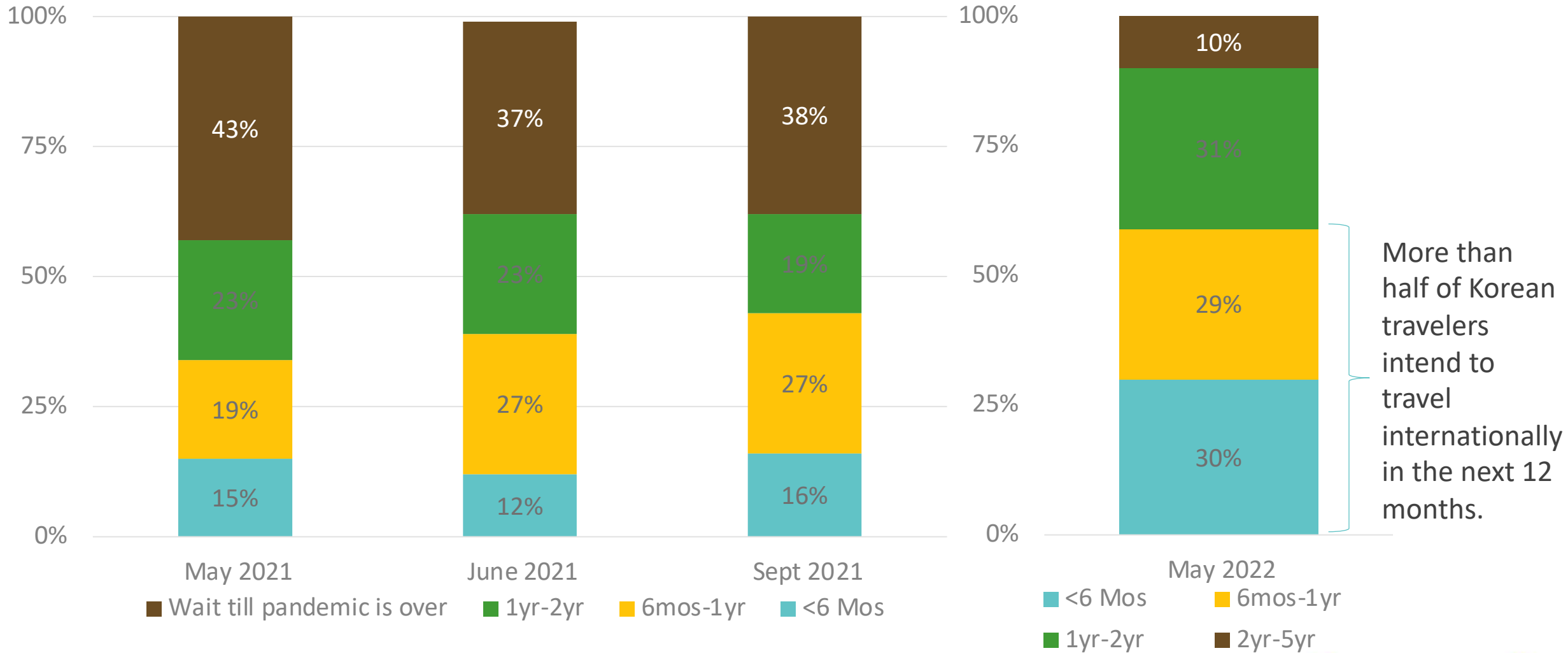
*Note: Question updated in May 2022 to clarify travel for any reason.



PRIMARY TRAVEL MOTIVATION



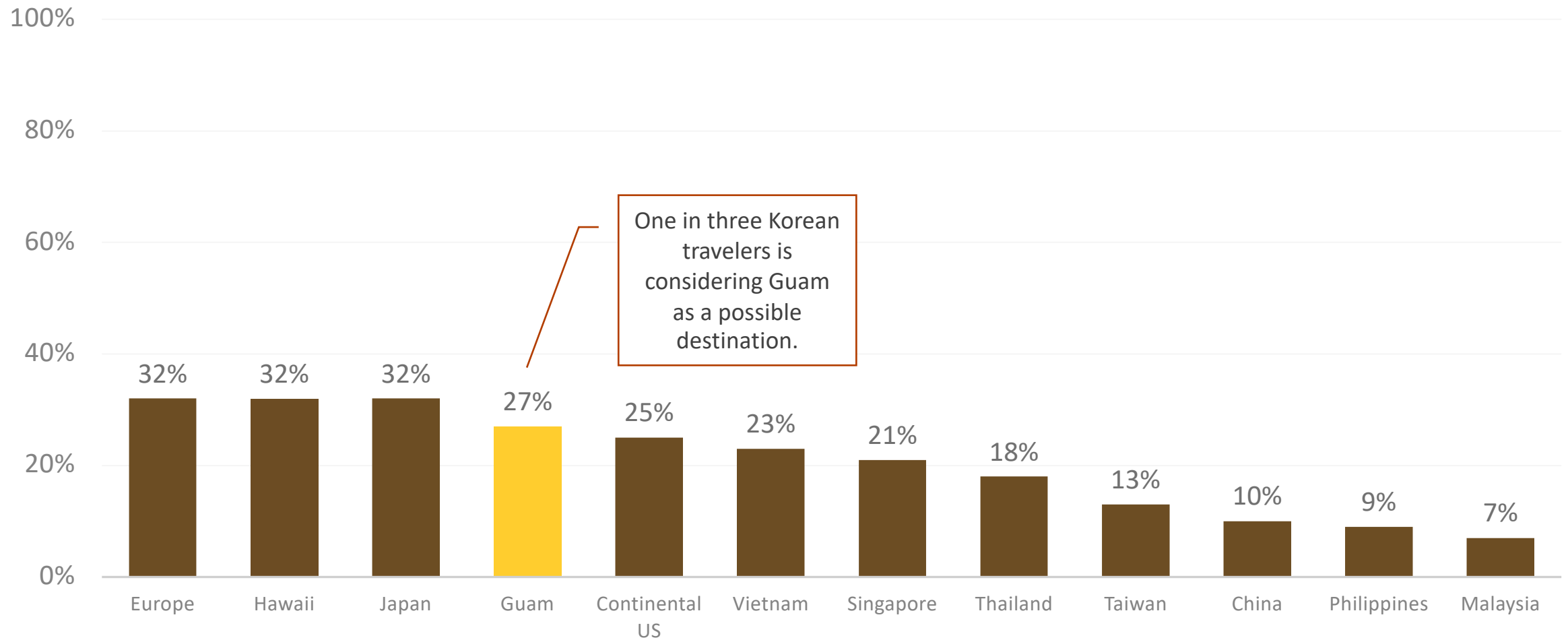
FUTURE TRAVEL PLANS



2021 Survey Q: When, if at all, do you intend to take an international trip for vacation purposes outside of Korea?
 2022 Survey Q: When, if at all, do you intend to take an international trip outside of Korea, for any reason?



POTENTIAL FUTURE TRAVEL DESTINATIONS



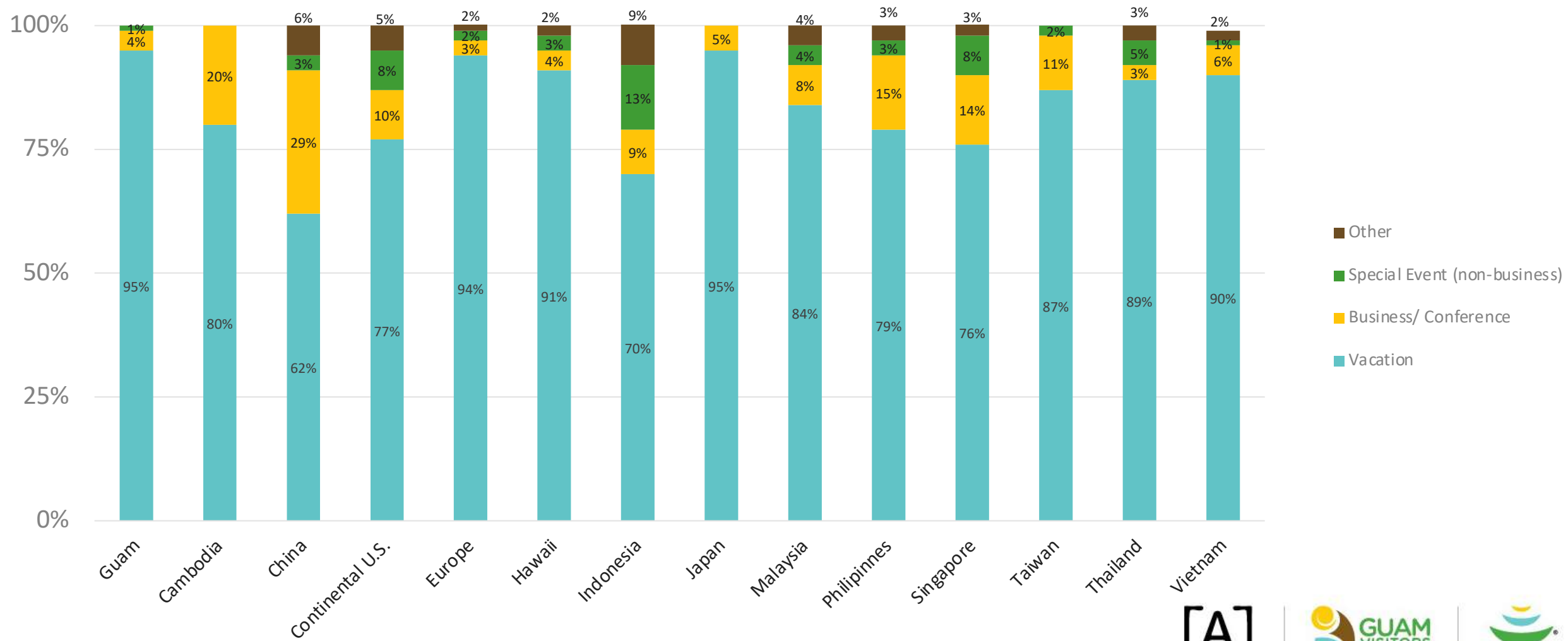
POTENTIAL FUTURE TRAVEL DESTINATIONS – Tracking

	May 2021	June 2021	Sept 2021	May 2022*
Europe	36%	37%	38%	32%
Guam	30%	24%	31%	27%
Hawaii	35%	27%	30%	32%
Japan	30%	29%	24%	32%
Continental U.S.	30%	23%	22%	25%
Singapore	25%	22%	20%	21%
Thailand	15%	19%	18%	18%
Vietnam	16%	20%	16%	23%
Taiwan	17%	13%	15%	13%
Philippines	9%	11%	11%	9%
China	11%	9%	8%	10%

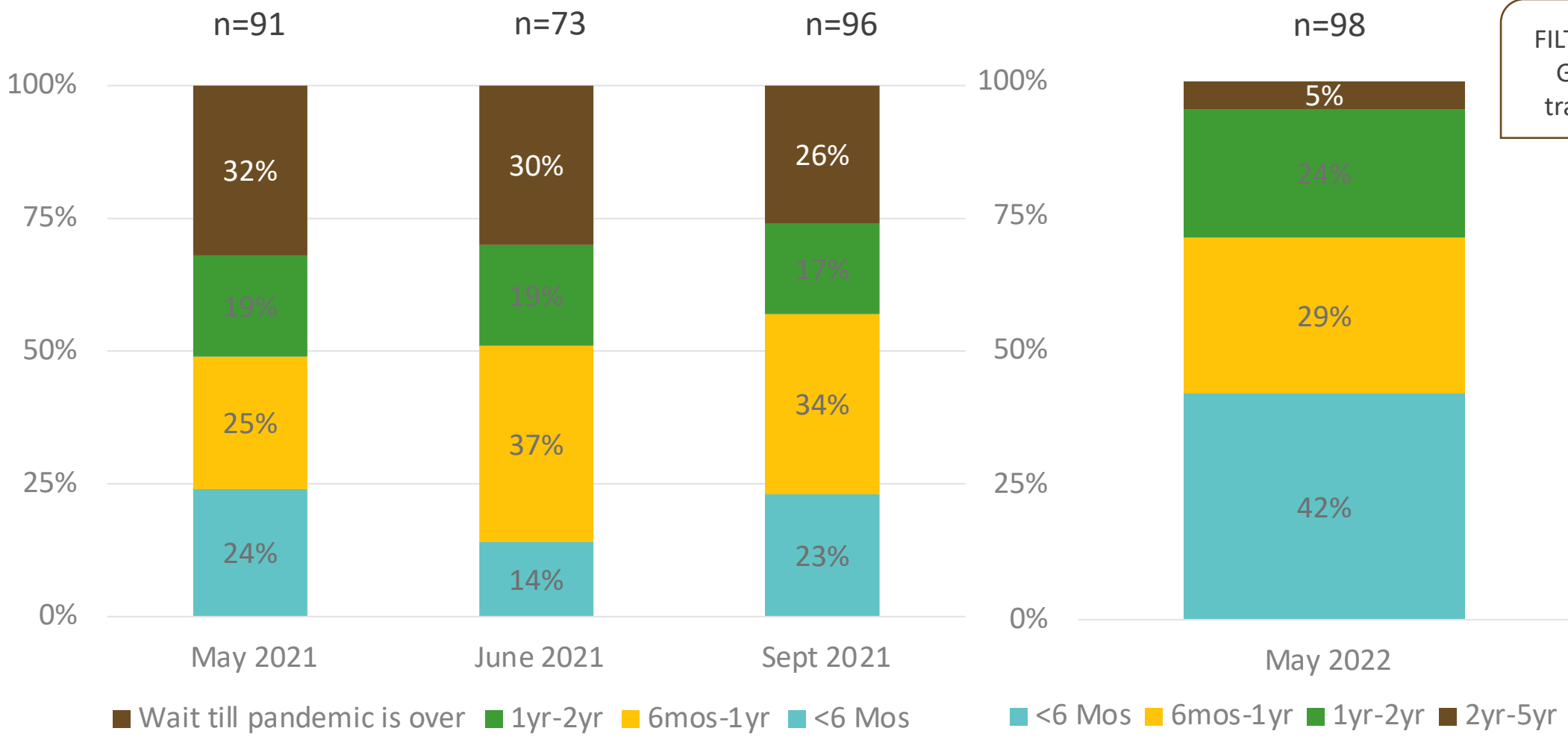
- Travelers from Korea considering Guam as an international destination statistically more likely to be considering the following destinations, as well: Hawaii, Continental US, Singapore, Thailand, China and Malaysia.



PURPOSE OF INTERNATIONAL TRAVEL



TIMING OF FUTURE TRAVEL TO GUAM



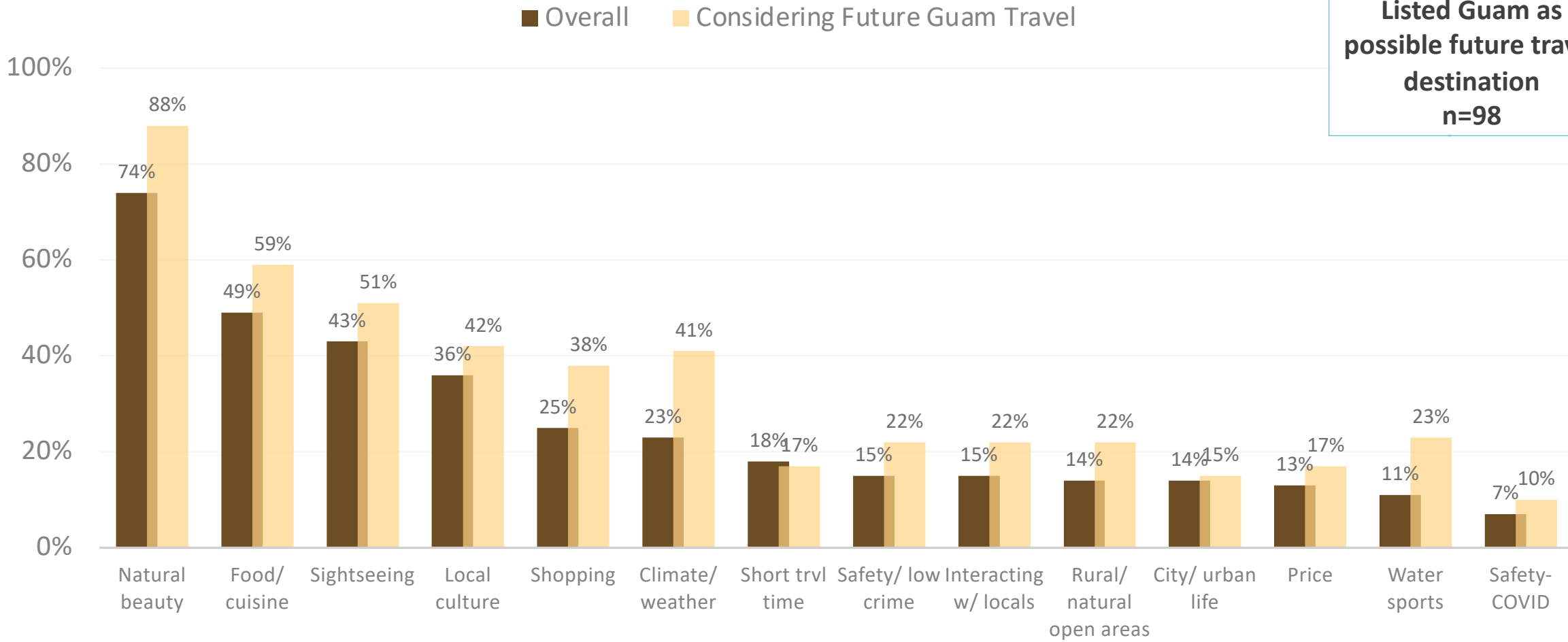
FILTER: Considering Guam as future travel destination

2021 Survey Q: When, if at all, do you intend to take an international trip for vacation purposes outside of Korea?
 2022 Survey Q: When, if at all, do you intend to take an international trip outside of Korea, for any reason?



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS

Filter:
Listed Guam as possible future travel destination
n=98



APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS – Tracking

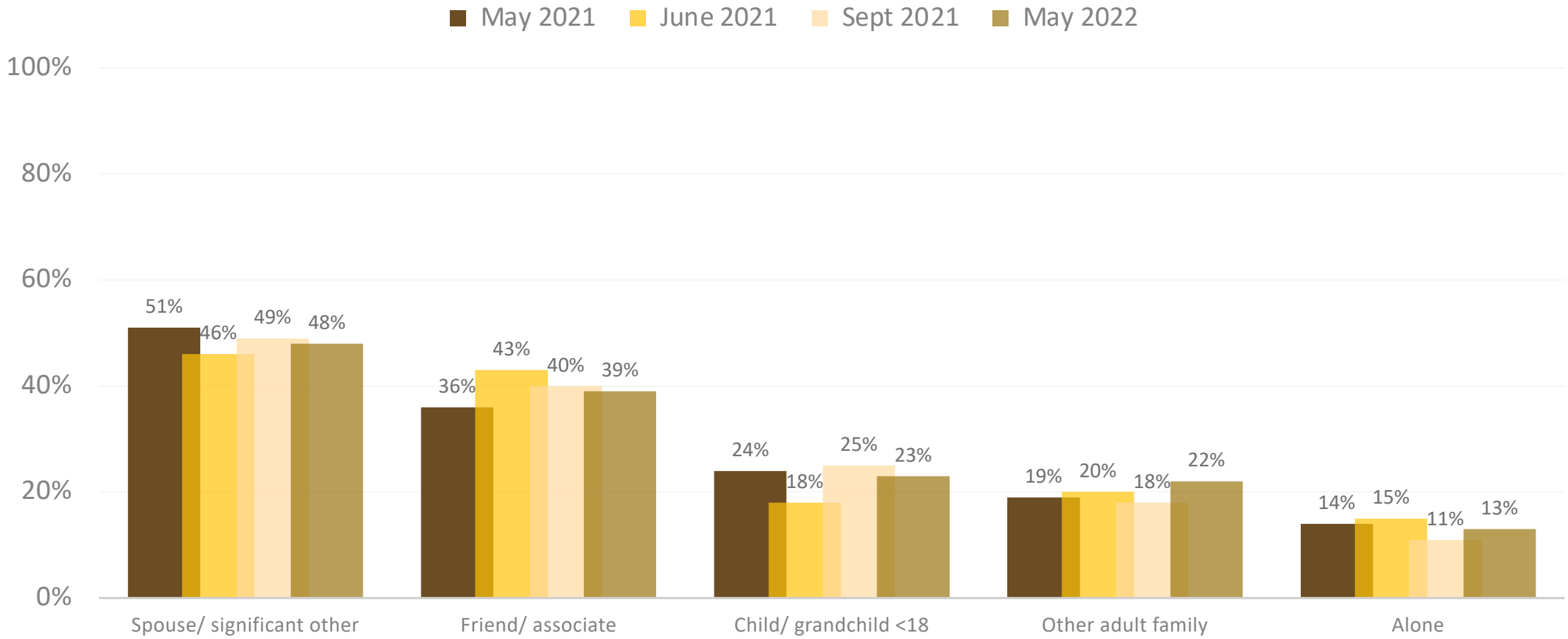
	May 2021	June 2021	Sept 2021	May 2022
Natural beauty	70%	66%	74%	74%
Sightseeing	48%	49%	45%	43%
Food/ cuisine	50%	44%	44%	49%
Local culture	35%	30%	32%	36%
Climate/ weather	35%	25%	26%	23%
Shopping	26%	24%	21%	25%
Safety- crime	21%	20%	17%	15%
Price of the destination	19%	15%	17%	13%
Rural/ open areas	19%	16%	16%	14%
City/ urban life	17%	15%	13%	14%
Interacting w/ locals	12%	14%	12%	15%
Safety- COVID	17%	14%	9%	7%
Cleanliness	11%	7%	6%	16% ↑
Water sports	9%	9%	8%	11%
Recreational activities	4%	4%	5%	9% ↑
Short travel distance	18%	14%	13%	18%
Quality of customer service	8%	6%	8%	6%
Sports events	6%	4%	6%	5%
Medical treatment/ service	5%	2%	3%	2%
Business/ conference	-	-	-	5%

↑ Indicates statistically significant increase from Sept 2021.

Q: What is appealing about those places?



FUTURE INTERNATIONAL TRAVEL PARTY



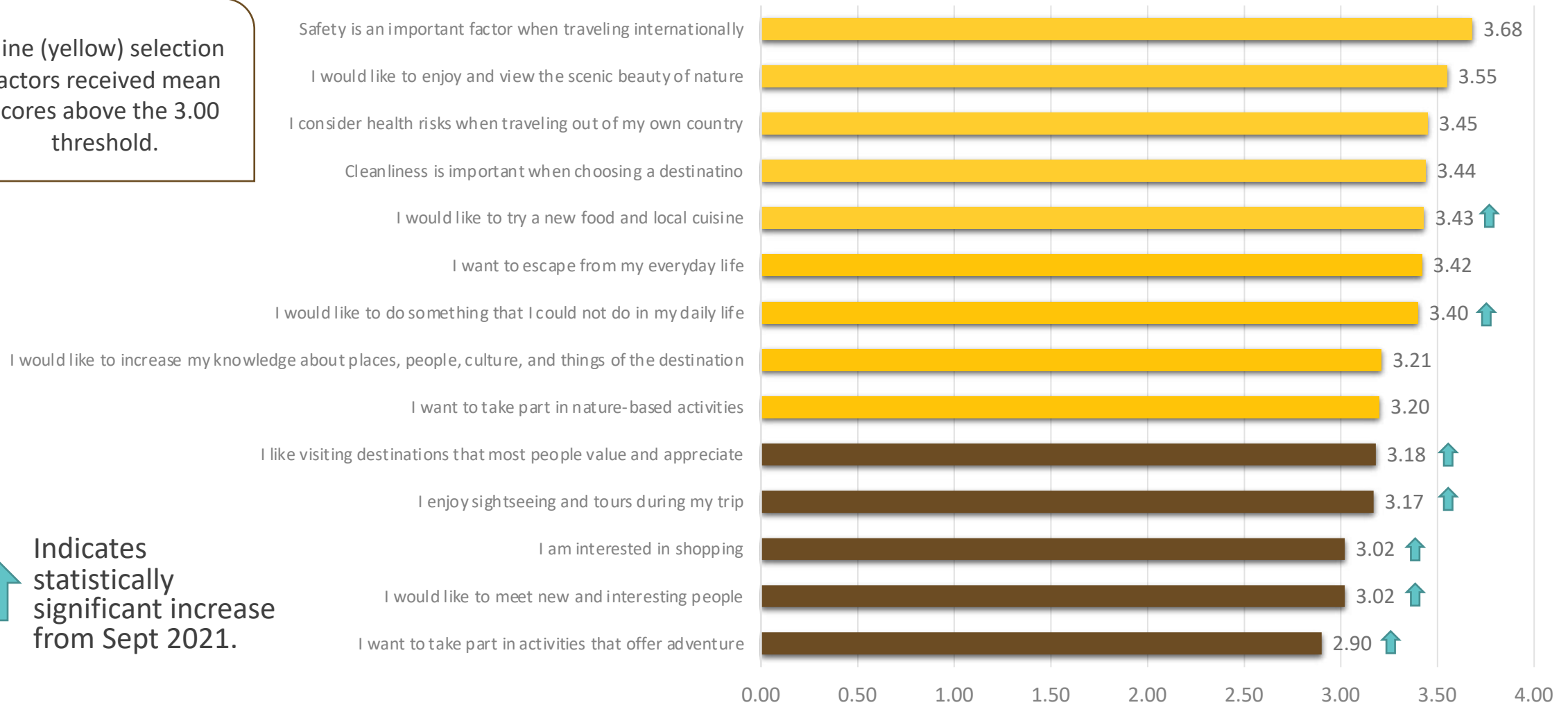
Note: Question updated in 2022 to emphasize once COVID-19 restrictions are lifted. Q: Thinking of your travel plans after COVID-19-related travel restrictions are lifted, who are you most looking forward to traveling with to an international destination?



DESTINATION SELECTION FACTORS – IMPORTANCE

MEAN SCORE 4PT SCALE

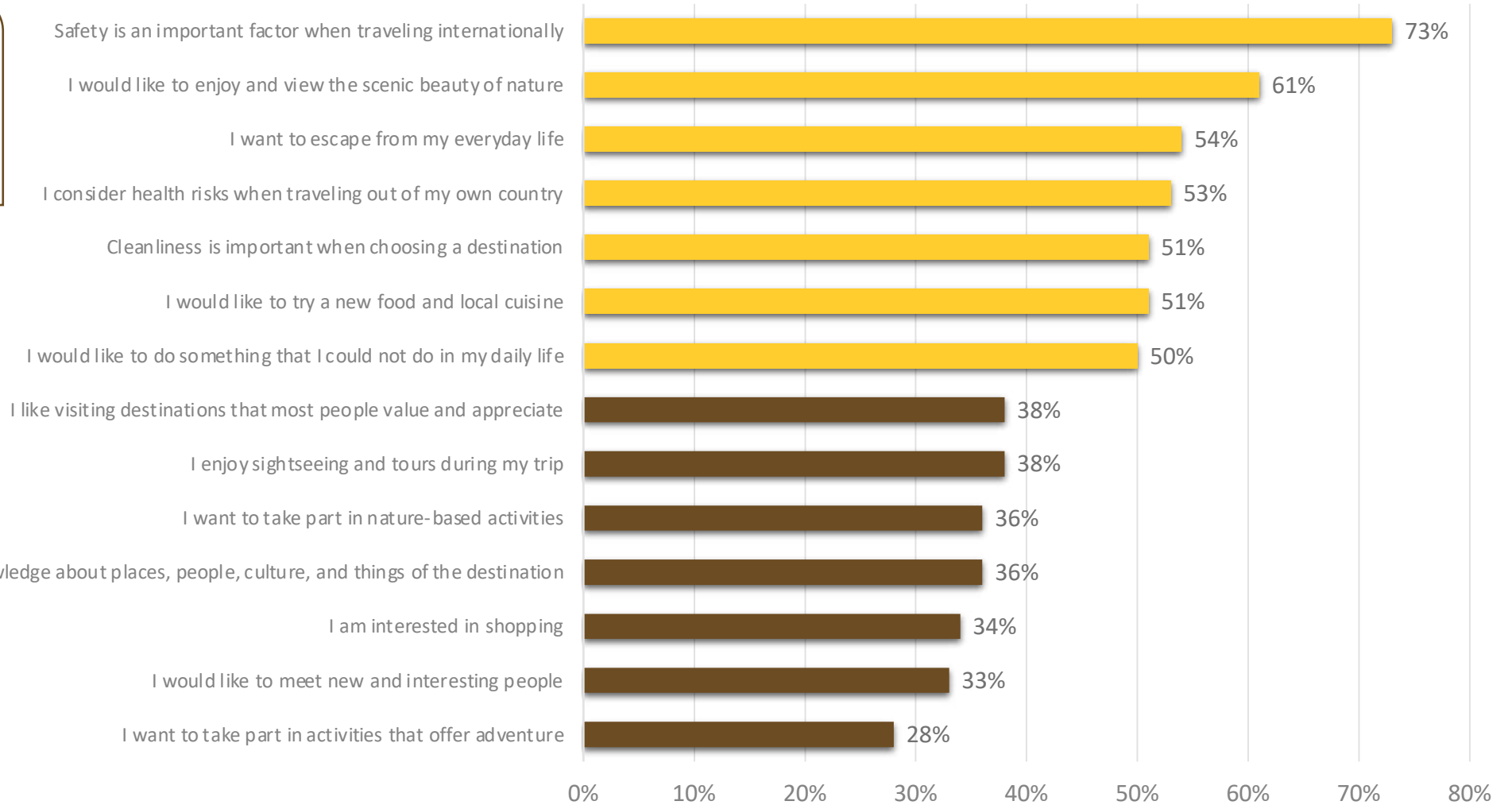
Nine (yellow) selection factors received mean scores above the 3.00 threshold.



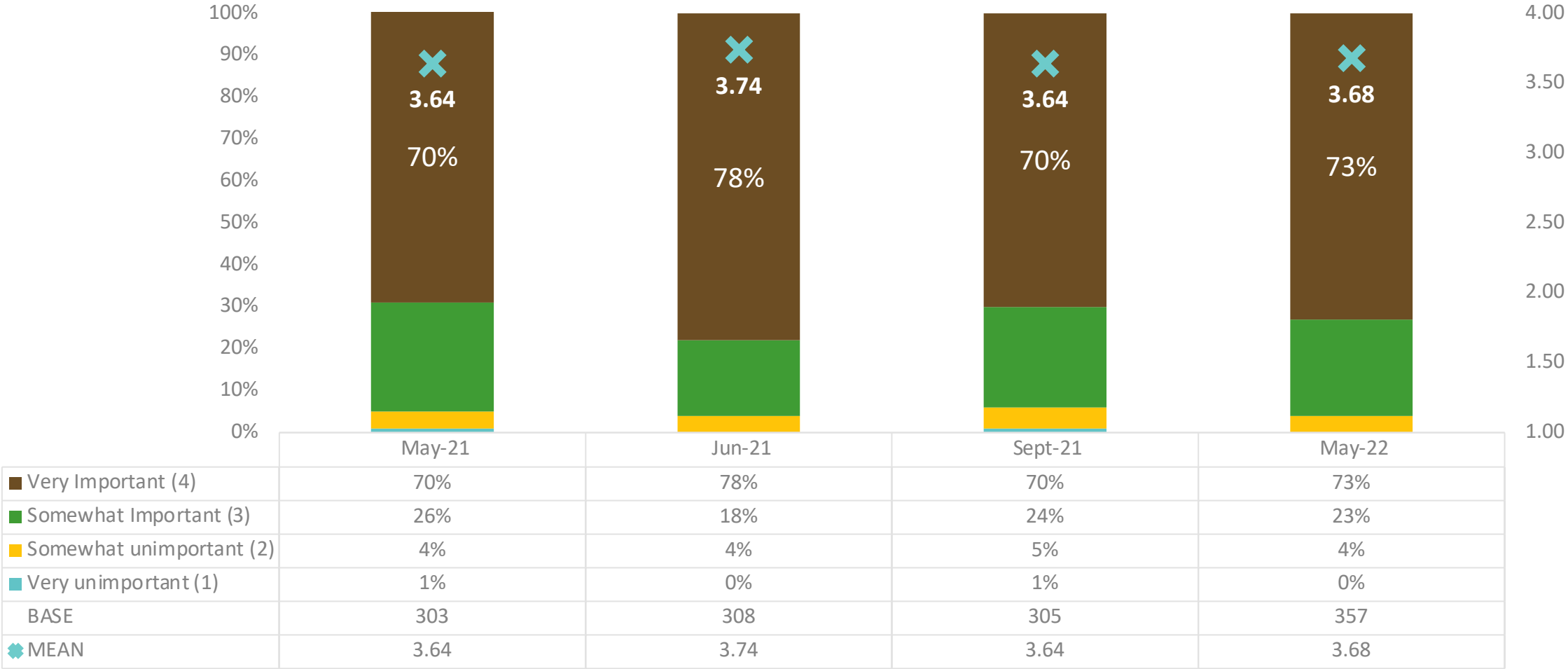
↑ Indicates statistically significant increase from Sept 2021.

DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

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



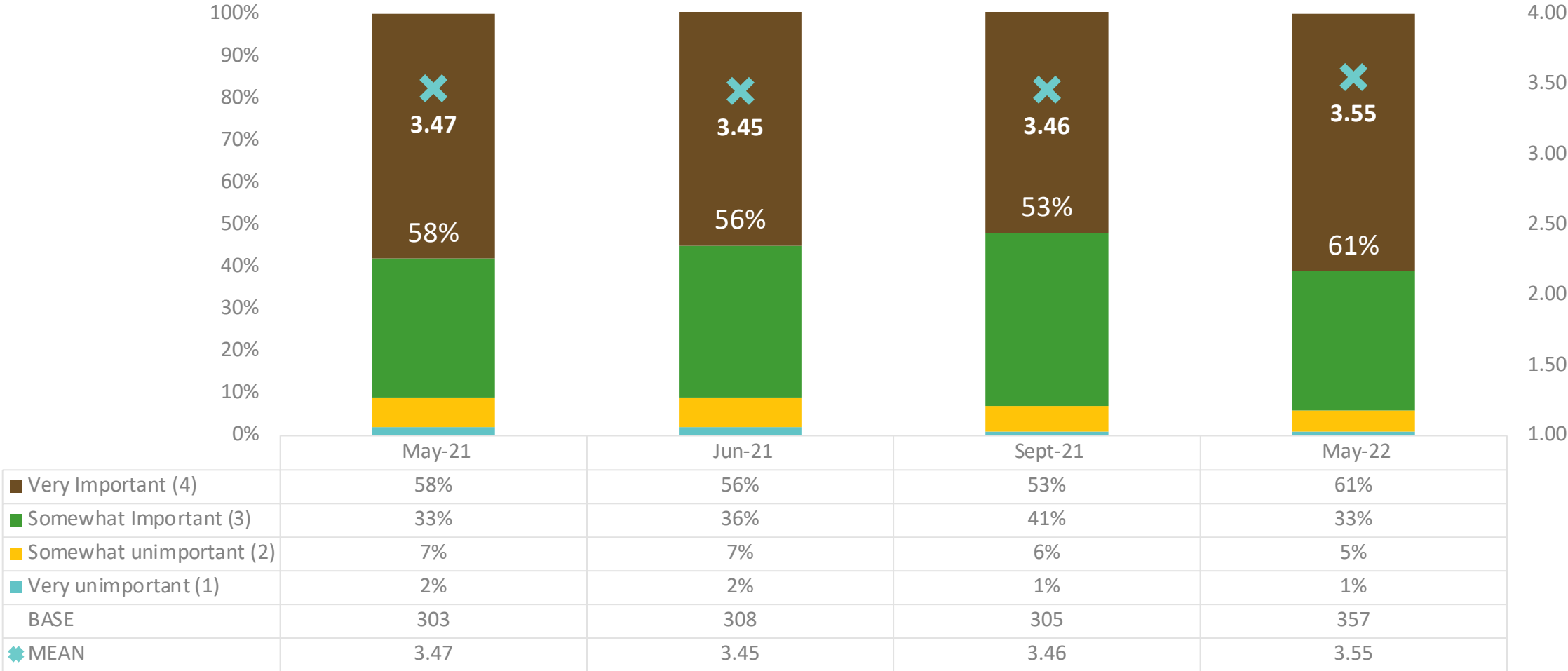
Safety is an important factor when traveling internationally



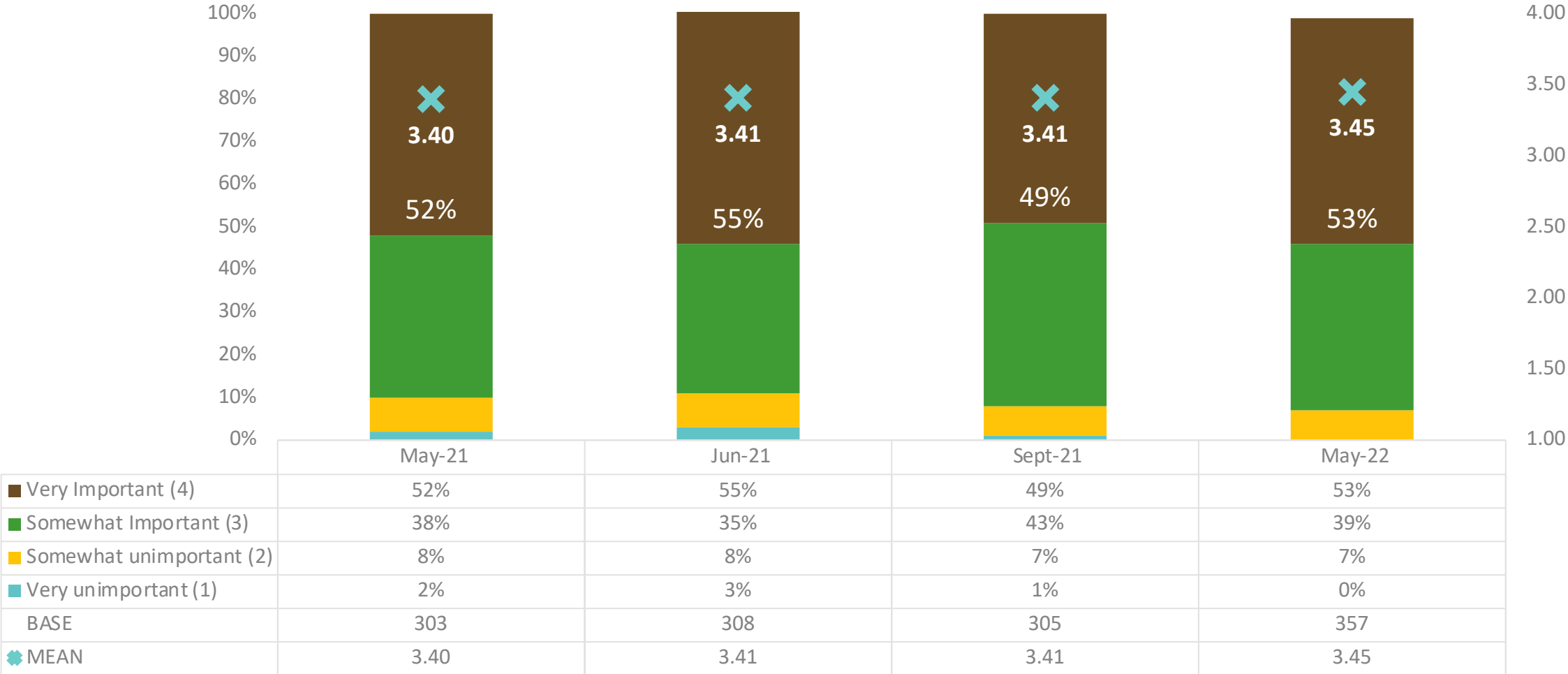
Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



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



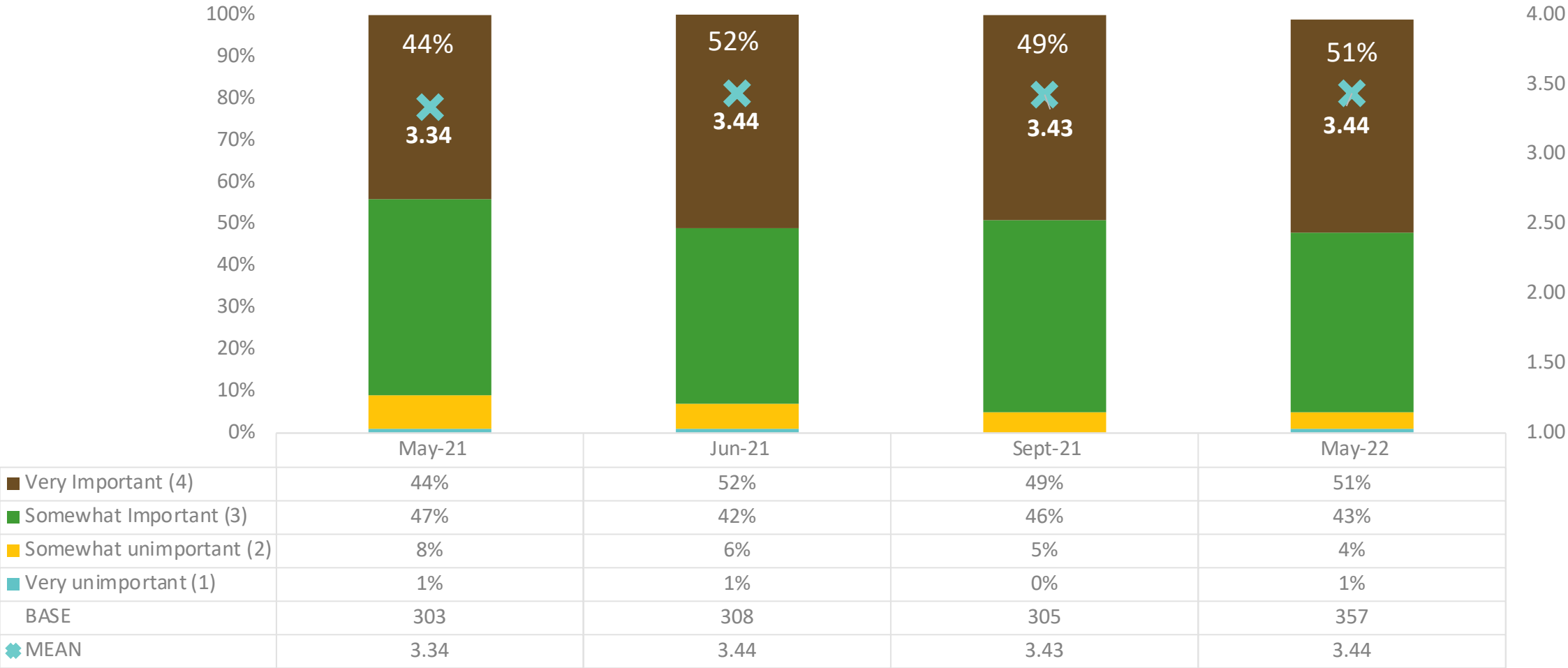
I consider health risks when traveling out of my own country



Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



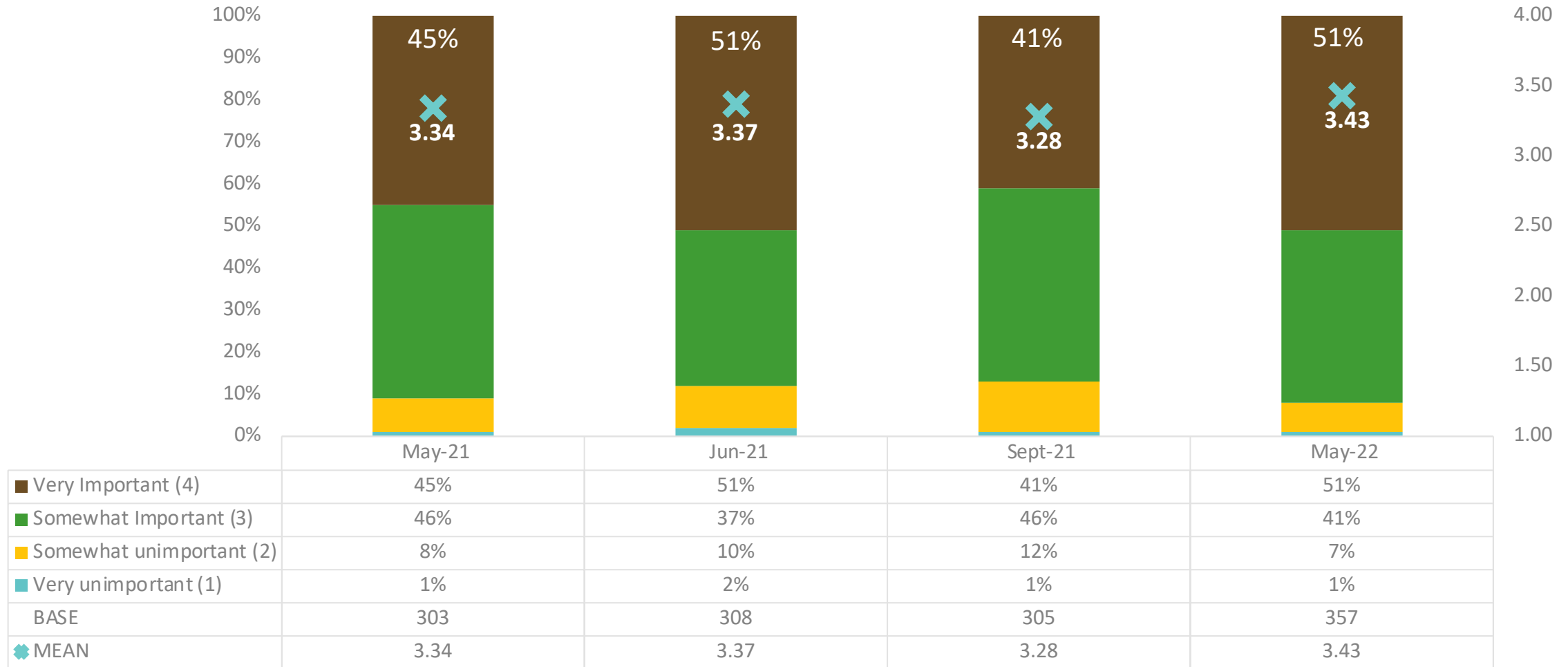
Cleanliness is important when choosing a destination



Q: When considering a destination to visit, in general, how important are each of the following in your decision of where to go?



I would like to try a new food and local cuisine



I want to escape my everyday life

