

Korea In-Market Insight Report







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.



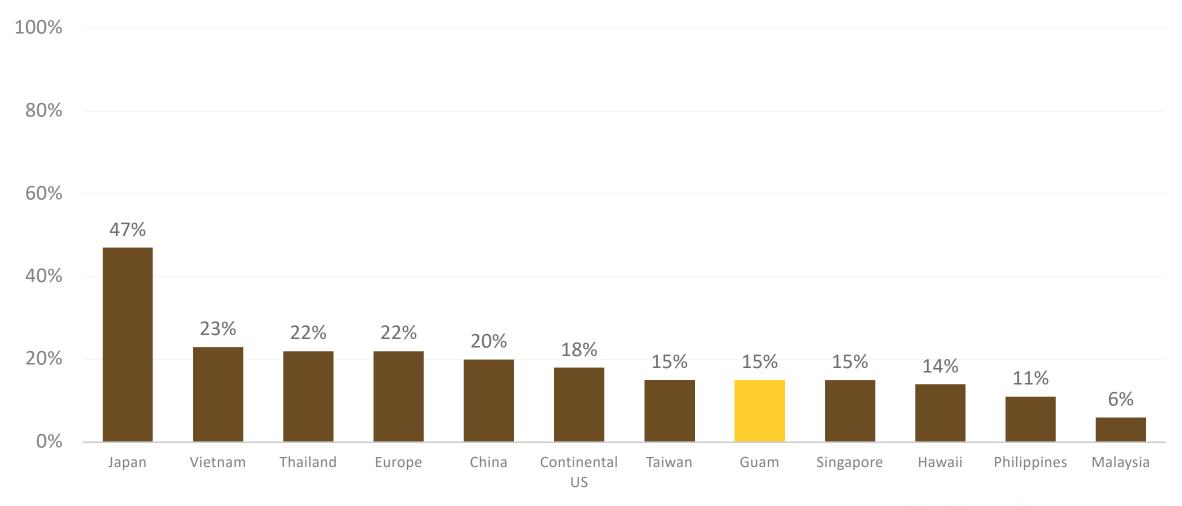








TRAVEL HISTORY









TRAVEL HISTORY – Tracking

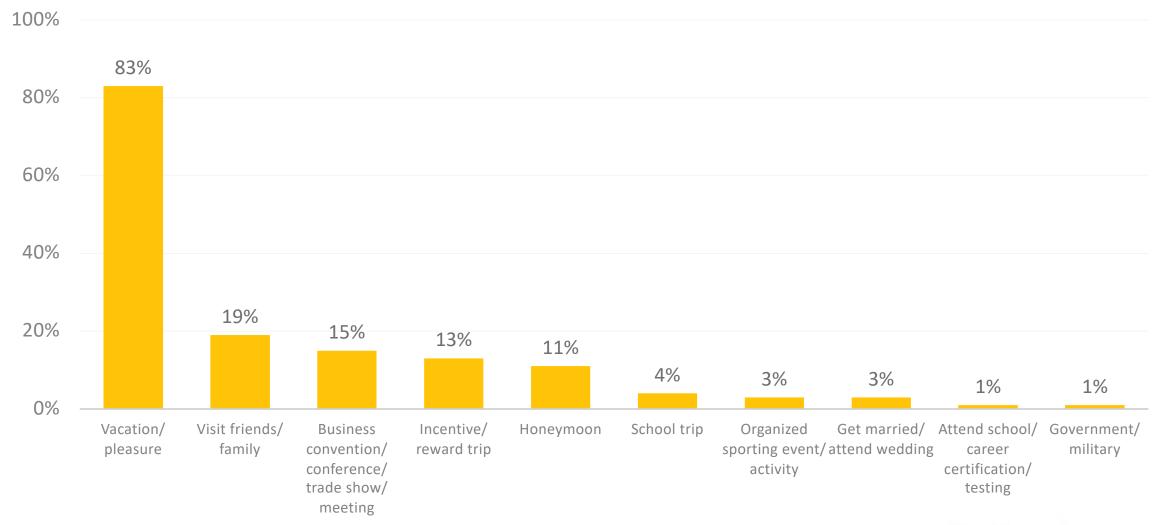
	May 2021	June 2021	Sept 2021	May 2022*
Japan	55%	50%	50%	47%
Thailand	20%	16%	24%	22%
China	26%	25%	22%	20%
Vietnam	22%	25%	21%	23%
Europe	25%	20%	20%	22%
Taiwan	18%	13%	18%	15%
Guam	15%	13%	16%	15%
Philippines	12%	11%	14%	11%
Continental U.S.	22%	15%	13%	18%
Singapore	17%	13%	13%	15%
Hawaii	13%	11%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







PRIMARY TRAVEL MOTIVATION

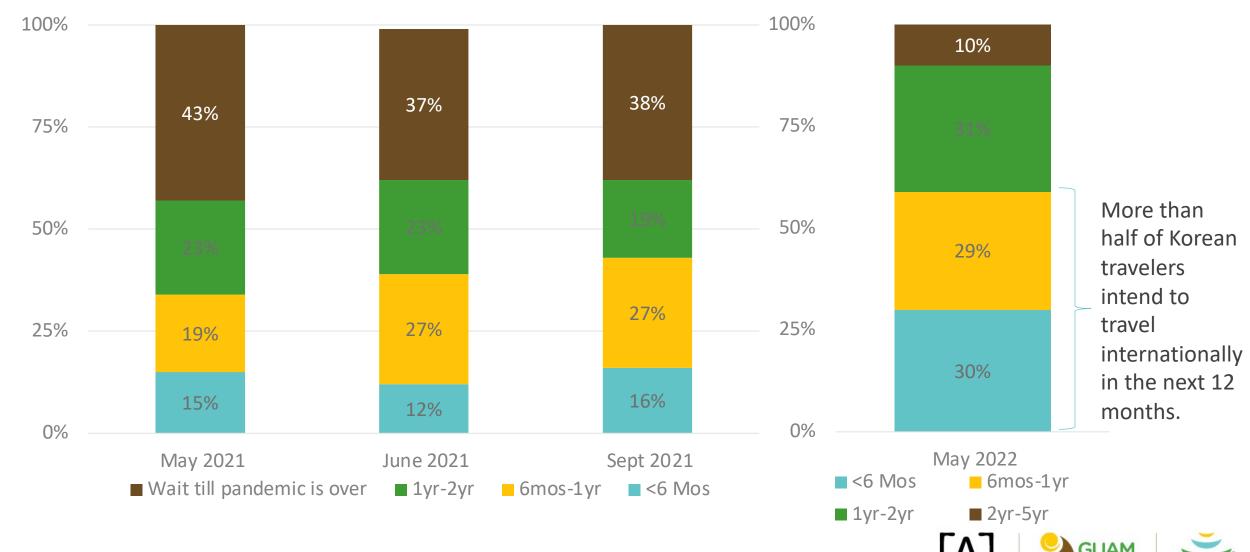








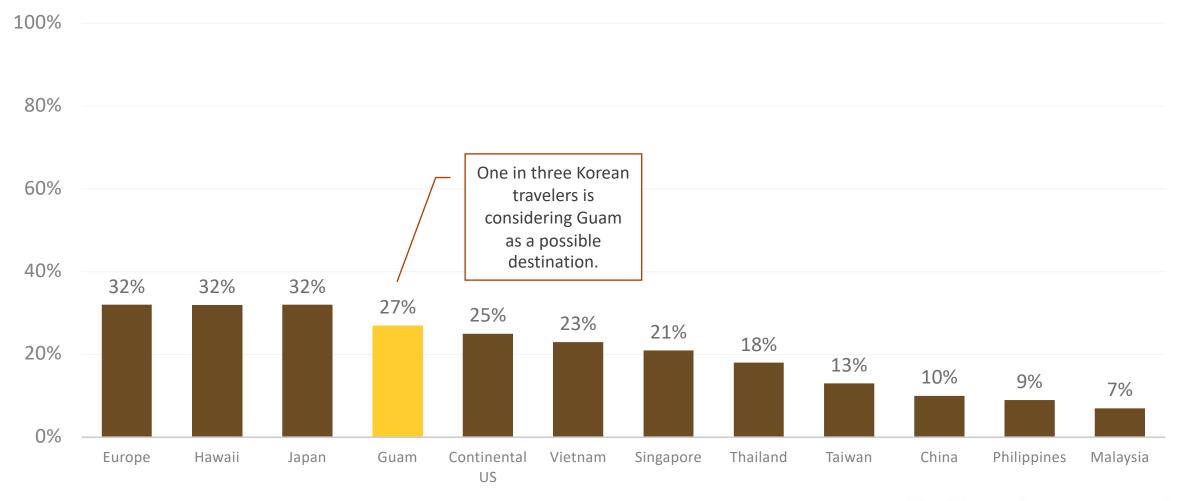
FUTURE TRAVEL PLANS







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%

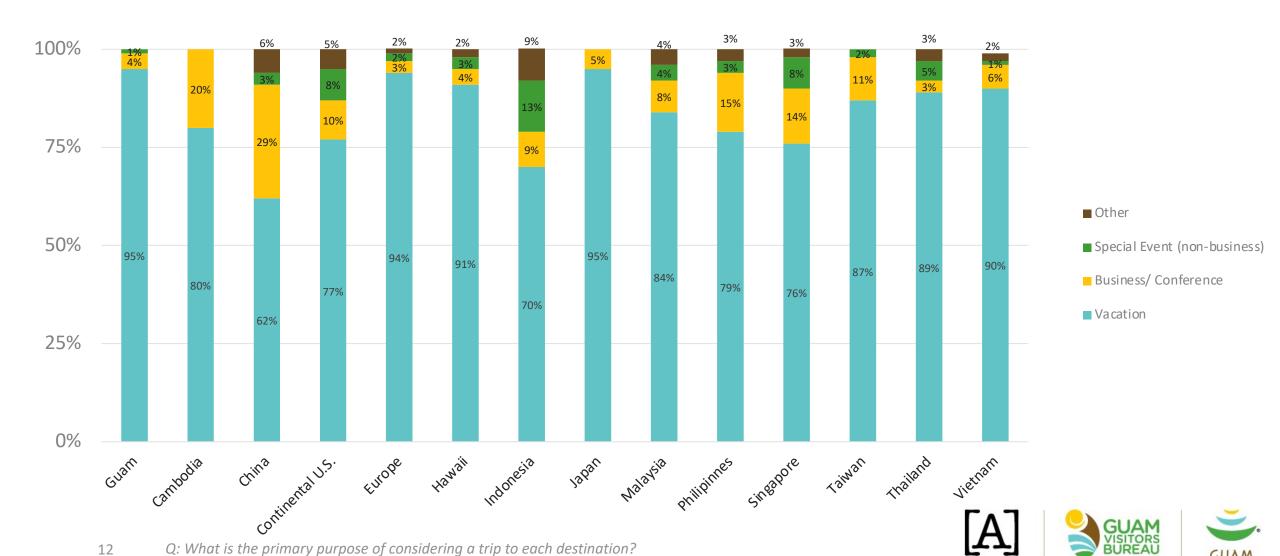
 Travelers from Korea considering Guam as an international destination statistically more likely to be considering the following destinations, as well: Hawaii, Continental US, Singapore, Thailand, China and Malaysia.



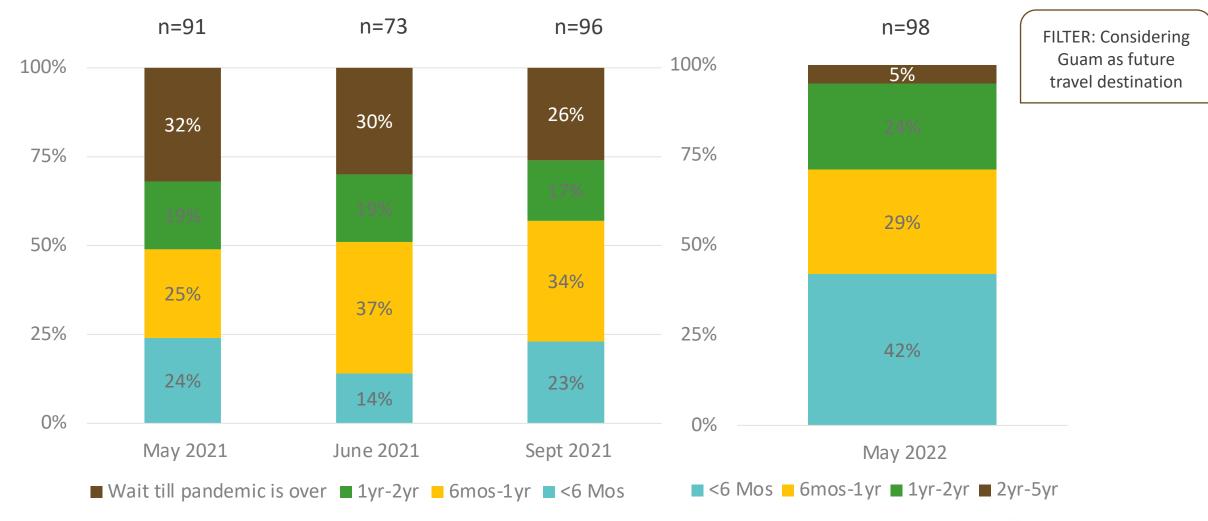




PURPOSE OF INTERNATIONAL TRAVEL



TIMING OF FUTURE TRAVEL TO GUAM

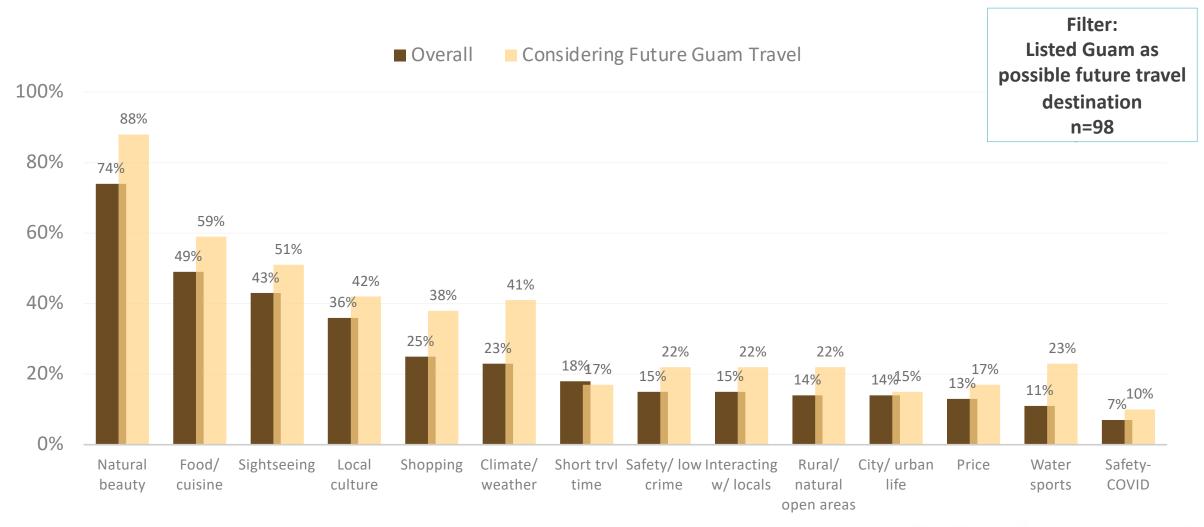








APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS



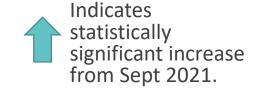






APPEAL OF INTERNATIONAL TRAVEL DESTINATIONS – Tracking

	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%



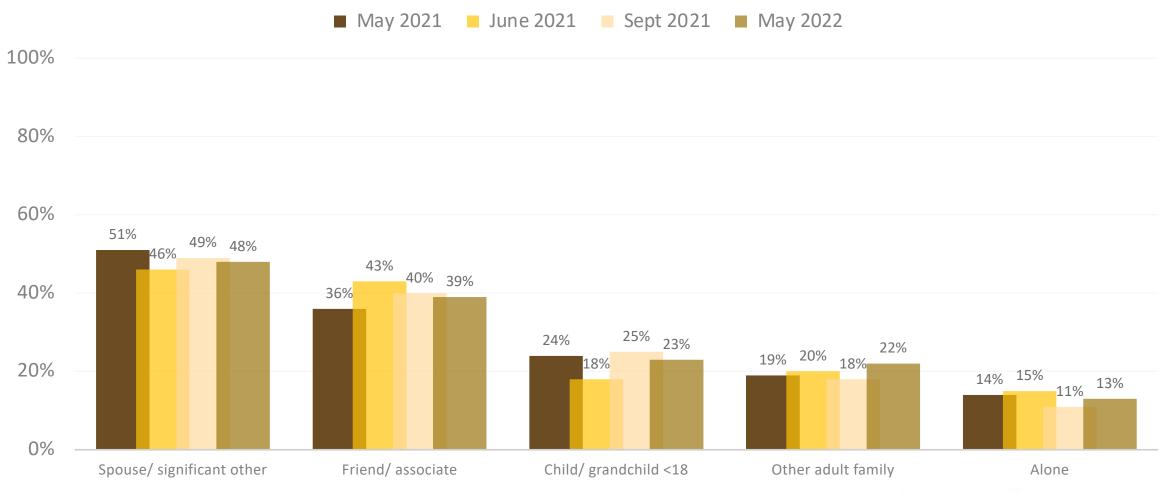
Q: What is appealing about those places?

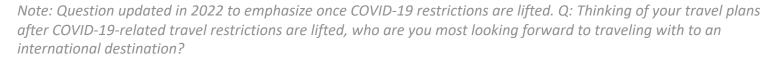






FUTURE INTERNATIONAL TRAVEL PARTY





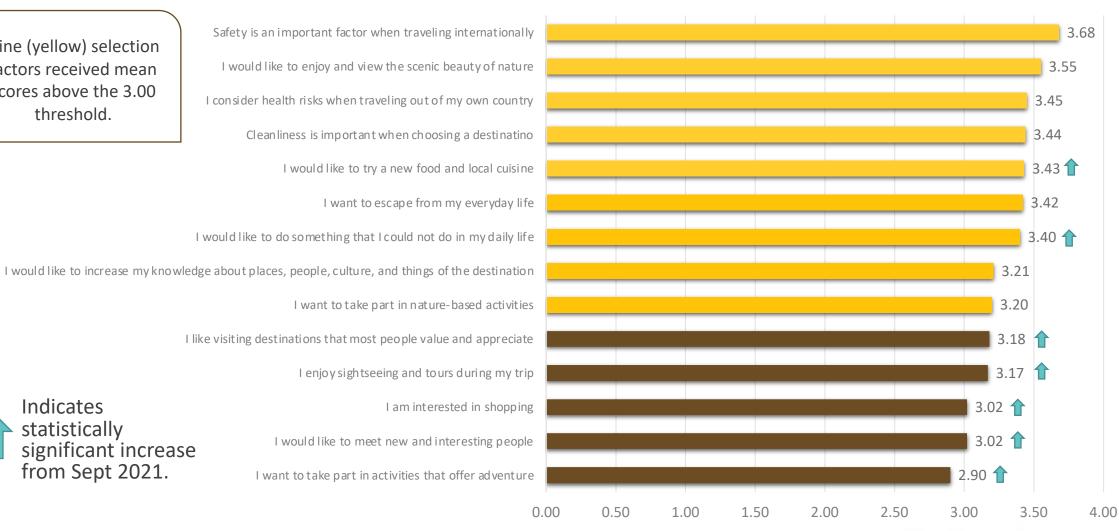






DESTINATION SELECTION FACTORS – IMPORTANCE MEAN SCORE 4PT SCALE

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









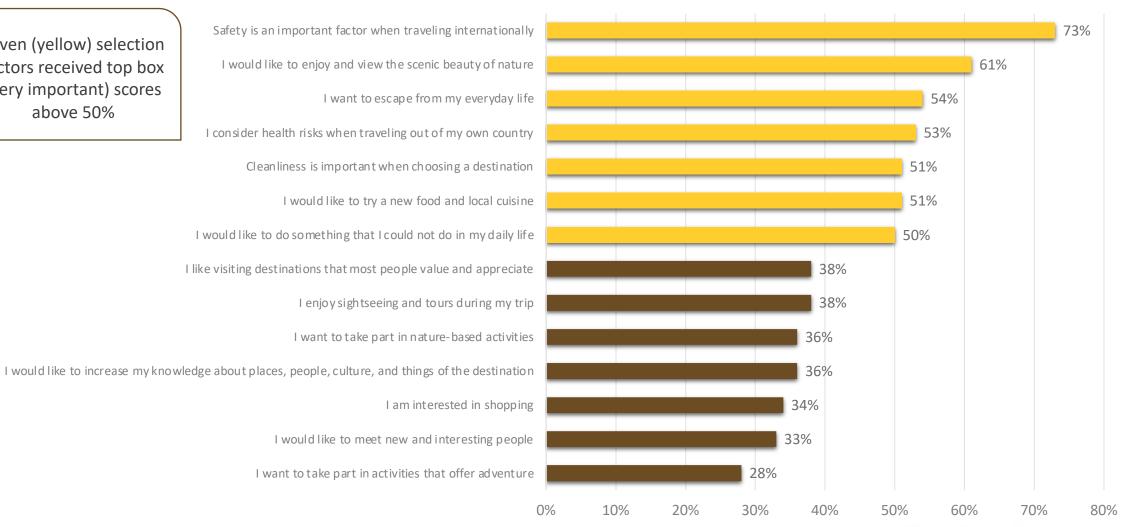


Indicates

statistically

DESTINATION SELECTION FACTORS – VERY IMPORTANT / TOP BOX

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

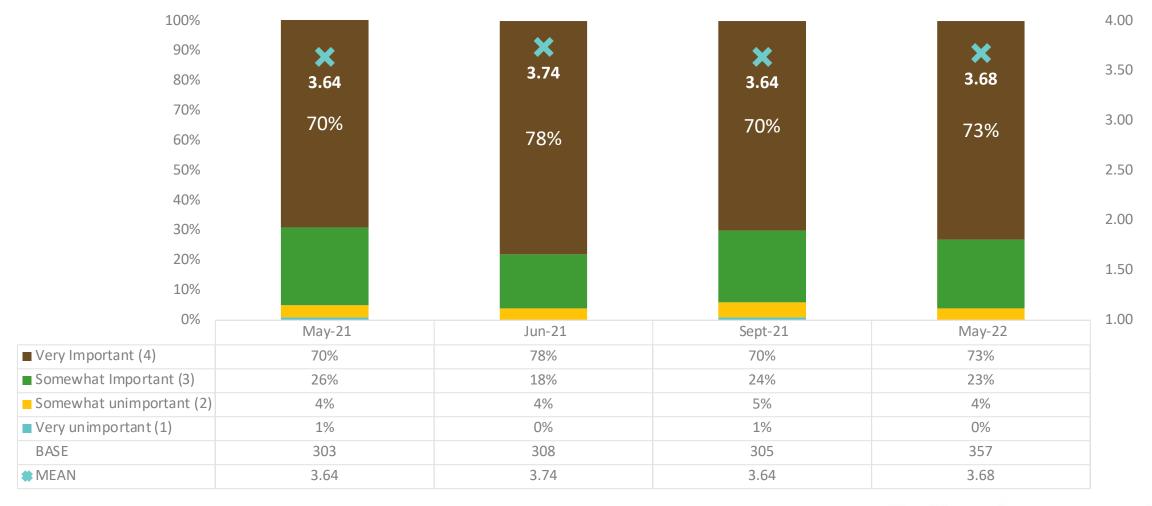








Safety is an important factor when traveling internationally

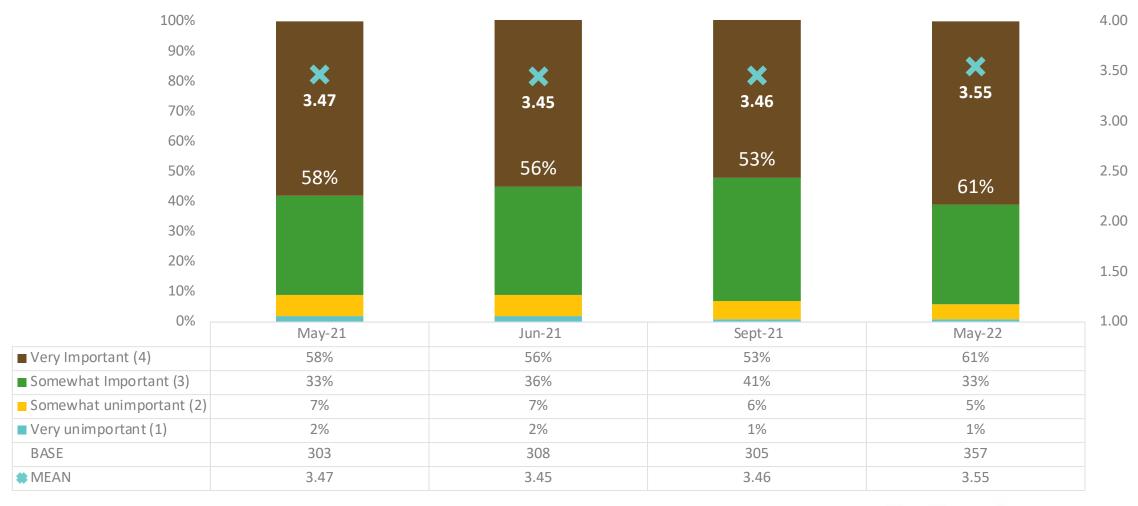








I would like to enjoy and view the scenic beauty of nature

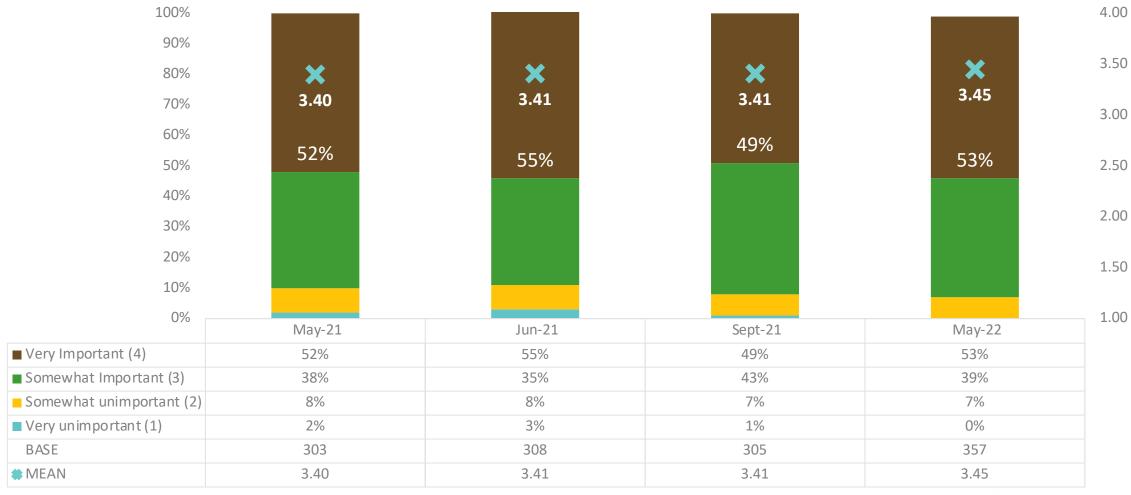








I consider health risks when traveling out of my own country

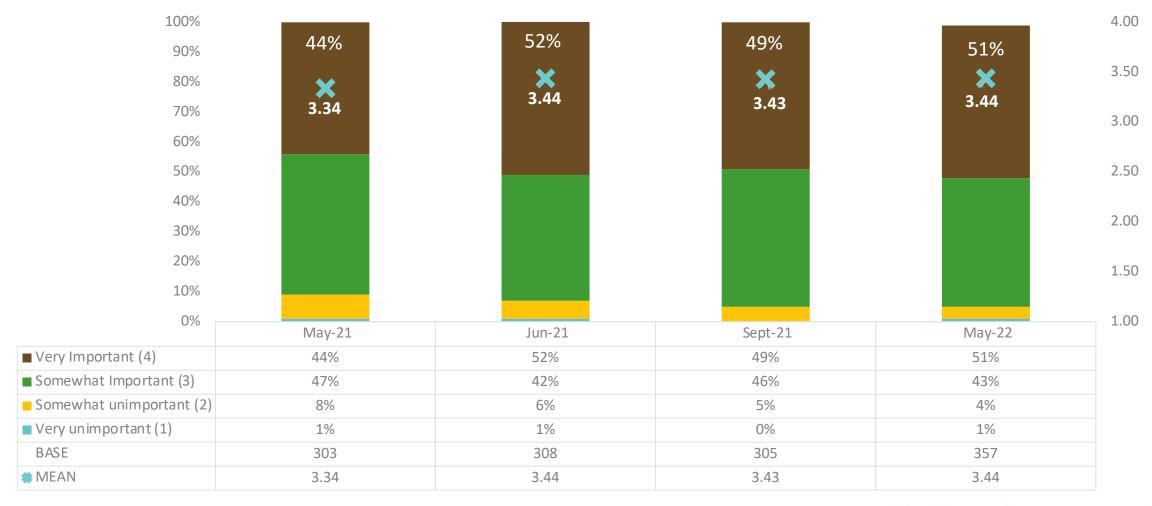








Cleanliness is important when choosing a destination

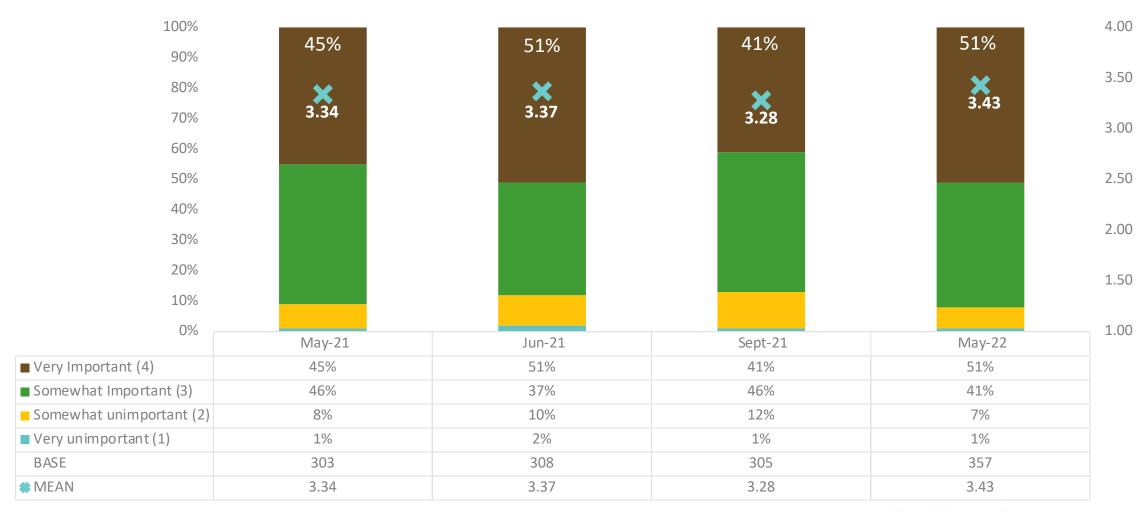








I would like to try a new food and local cuisine









I want to escape my everyday life

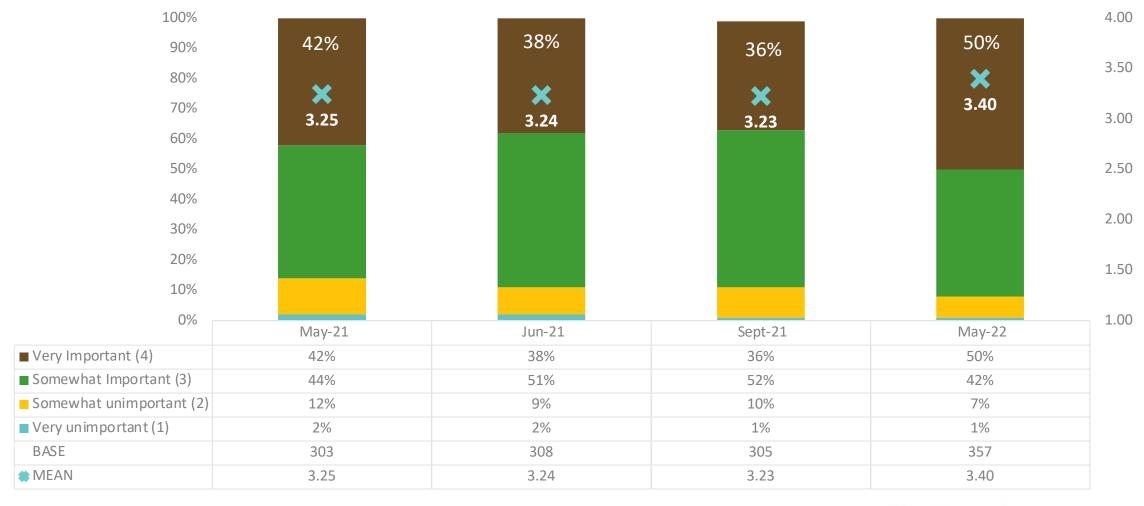








I would like to do something that I could not do in my daily life

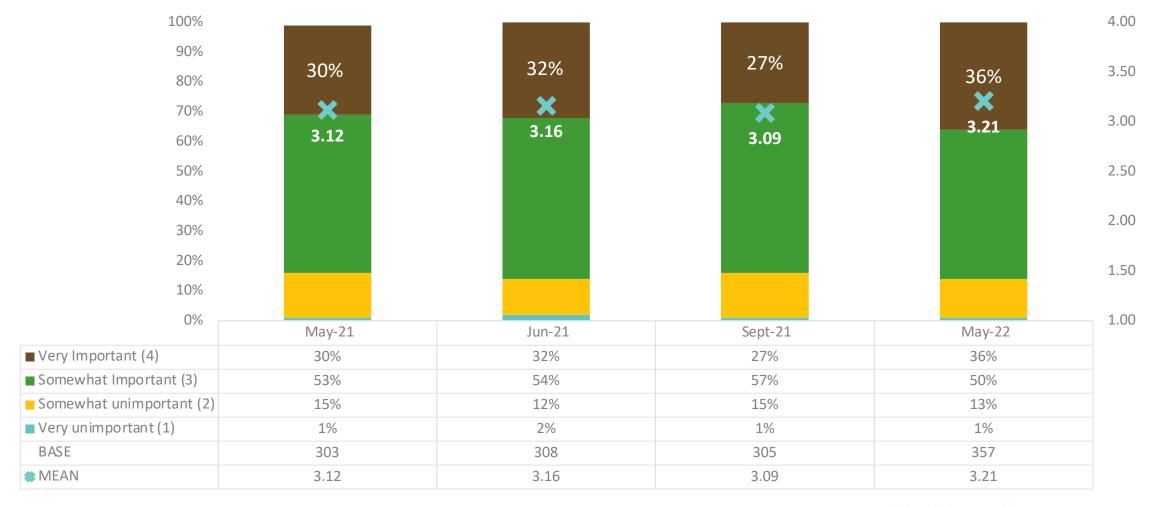








I would like to increase my knowledge about places, people, culture, and things of the destination









I want to take part in nature-based activities









I like visiting destinations that most people value and appreciate

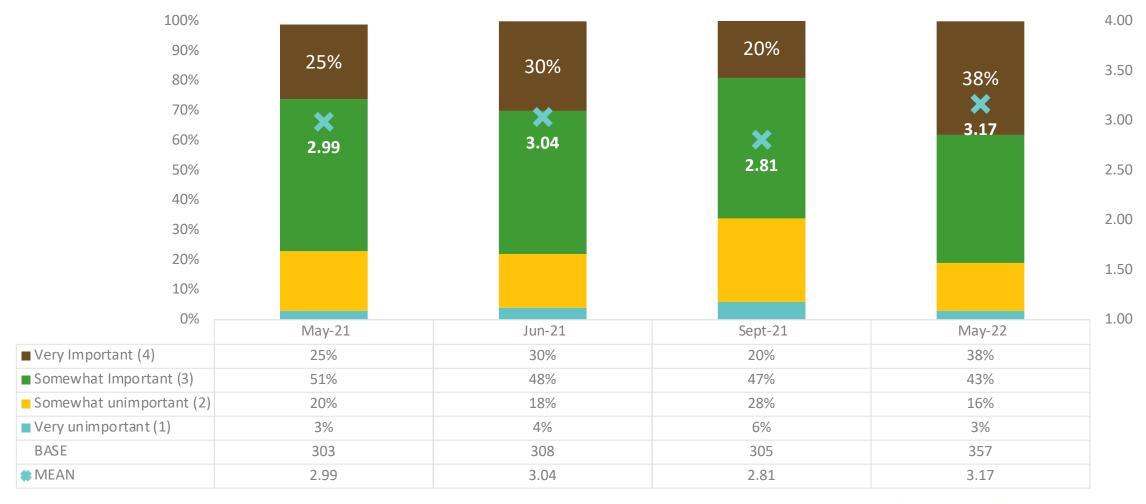








I enjoy sightseeing and tours during my trip









I am interested in shopping

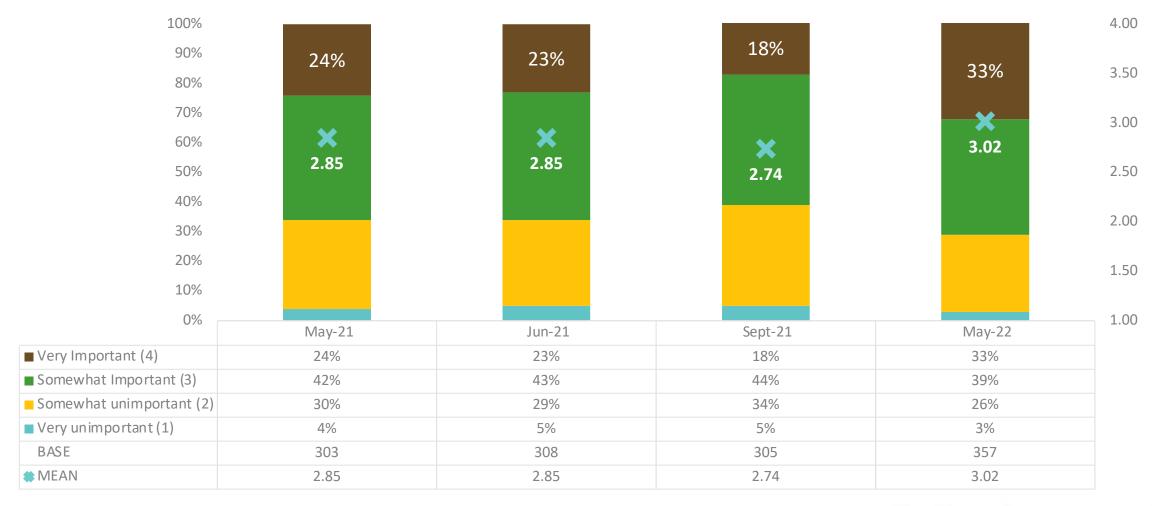








I would like to meet new and interesting people









I want to take part in activities that offer adventure









DESTINATION SELECTION FACTORS – TOP TWO

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

Safety is an important factor when traveling internationally 36% I would like to enjoy and view the scenic beauty of nature 26% I want to escape from my everyday life 22% 19% I would like to try a new food and local cuisine I consider health risks when traveling out of my own country 11% 11% I am interested in shopping I enjoy sightseeing and tours during my trip 10% 9% Cleanliness is important when choosing a destinatino 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 like visiting destinations that most people value and appreciate 6% I want to take part in nature-based activities 5% I want to take part in activities that offer adventure 5% I would like to meet new and interesting people 4% 0% 5% 10% 25% 35% 15% 20% 30% 40%

Base n=334







DESTINATION SELECTION FACTORS – TOP TWO

	May 2021	June 2021	Sept 2021	May 2022
BASE	277	293	282	334
Safety is an important factor when travelling internationally	41%	43%	44%	36%
I would like to enjoy and view the scenic beauty of nature	32%	26%	26%	26%
I want to escape from my everyday life	20%	19%	18%	22%
I would like to try a new food and local cuisine	18%	20%	18%	19%
I consider health risks when travelling out of my own country	14%	15%	14%	11%
Cleanliness is important when choosing a destination	7%	11%	11%	9%
I want to take part in nature-based activities	3%	4%	9%	5%
I would like to do something that I could not do in my daily life	10%	10%	8%	9%
I would like to increase my knowledge about places, people, culture, and things of the destination	8%	4%	7%	8%
I am interested in shopping	8%	5%	6%	11%
I enjoy sightseeing and tours during my vacation	5%	8%	6%	10%
I like visiting destinations that most people value and appreciate	5%	3%	4%	6%
I would like to meet new and interesting people	3%	6%	2%	4%
I want to take part in activities that offer adventure	2%	2%	1%	5%







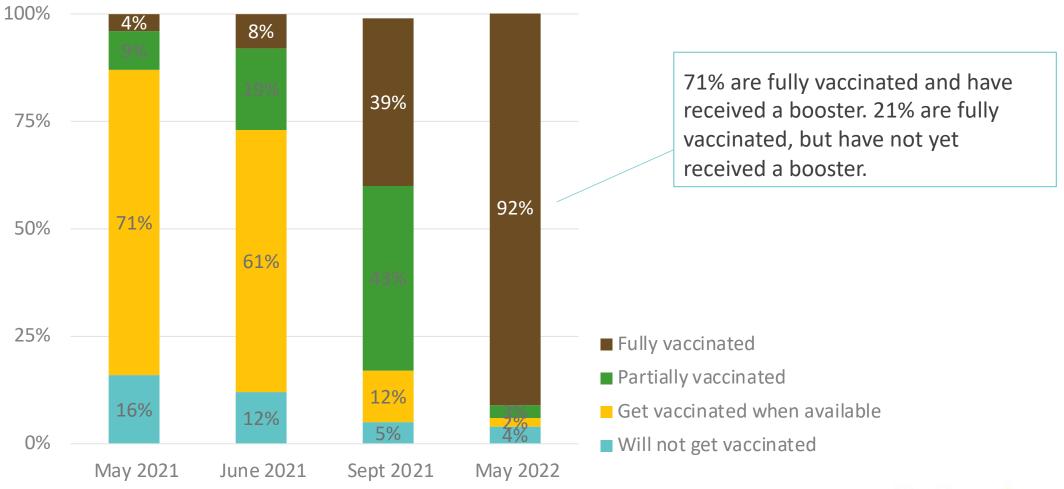








COVID-19 VACCINE STATUS



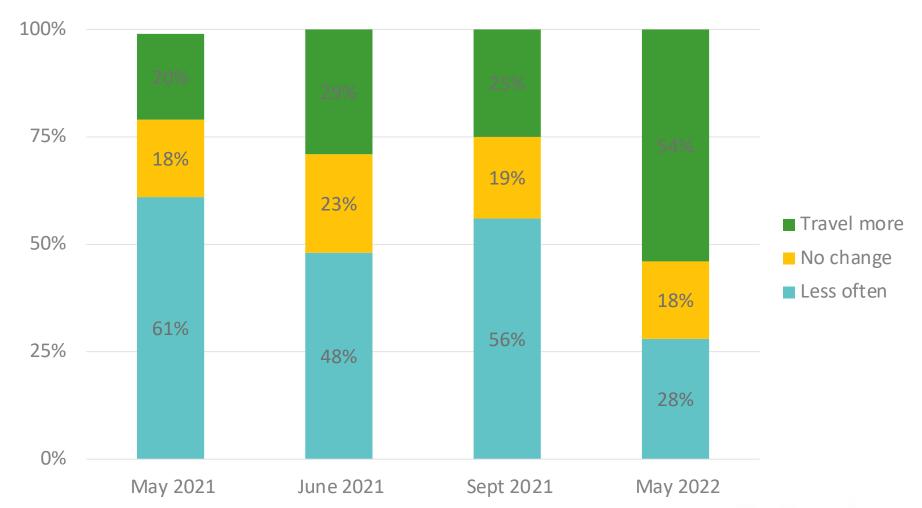






POST-COVID TRAVEL

The proportion of Korean visitors who intend to travel more frequently has increased significantly.

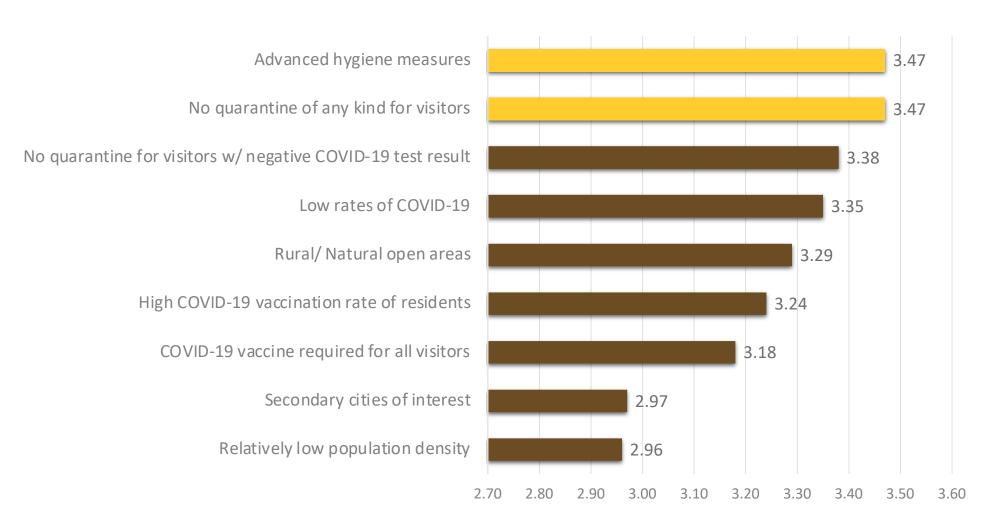








POST-COVID TRAVEL – IMPORTANCE 4PT RATING SCALE – MEAN SCORE



Importance of "Advanced hygiene measures" has remained the same in importance, at 3.47 mean in Sept. 2021.

Importance of "No quarantine of any kind for visitors" has increased from 3.04 in Sept. 2021.

Importance of "Low rates of COVID-19" has decreased in importance, from 3.59 mean in Sept. 2021.







POST-COVID SELECTION FACTOR Low rates of COVID-19



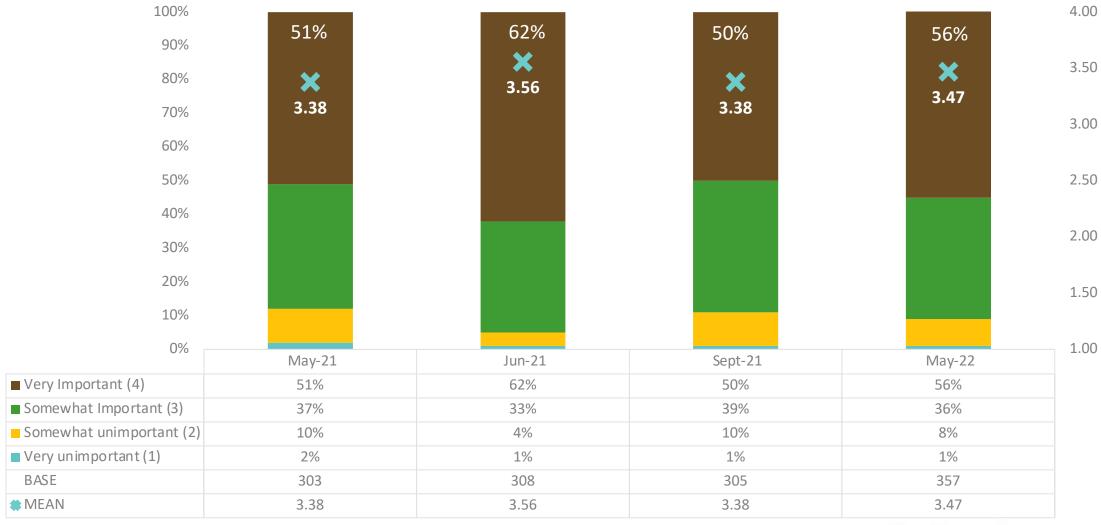






POST-COVID SELECTION FACTOR

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

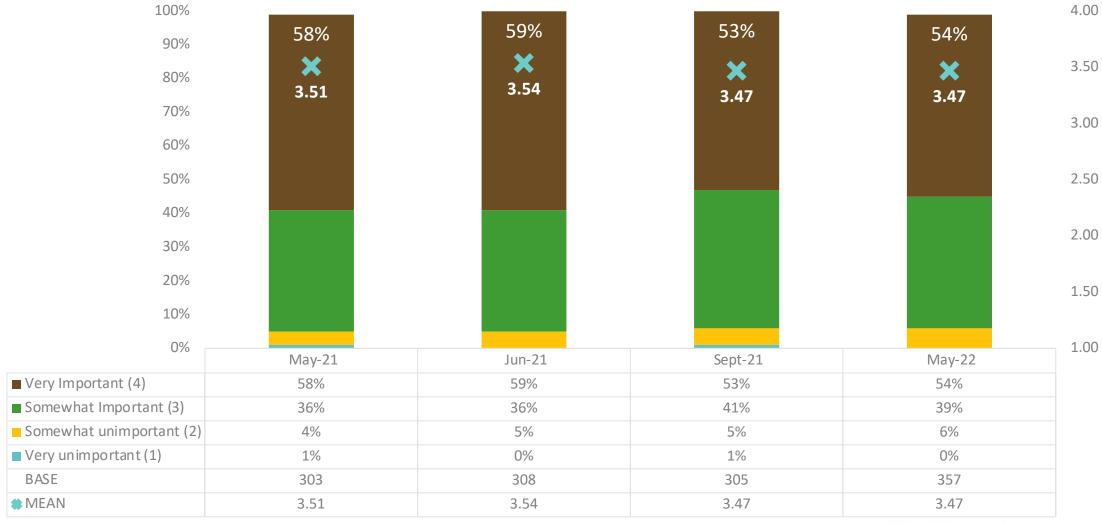








POST-COVID SELECTION FACTOR Advanced hygiene measures

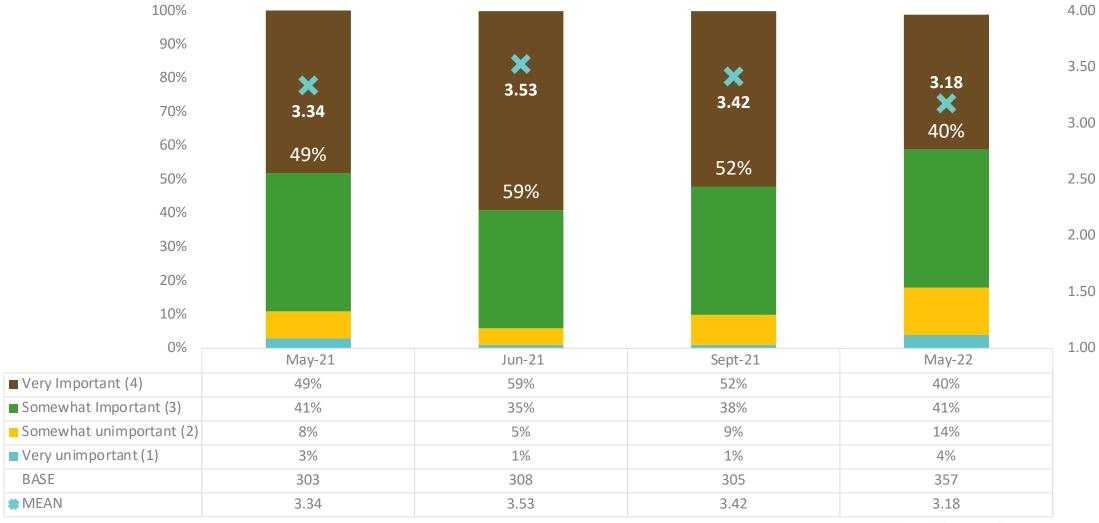








POST-COVID SELECTION FACTOR COVID-19 vaccine required for all visitors

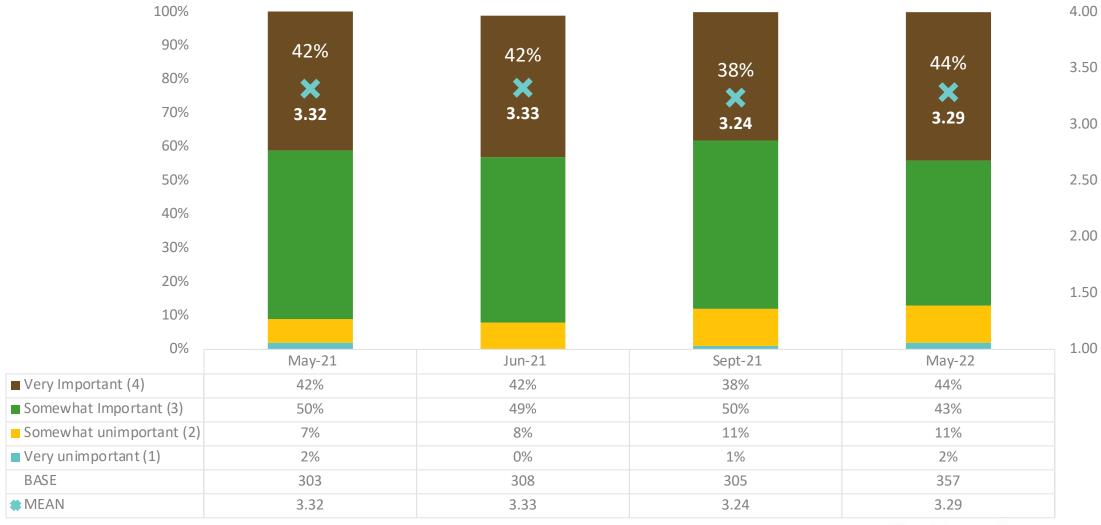








POST-COVID SELECTION FACTOR Rural/ natural open areas

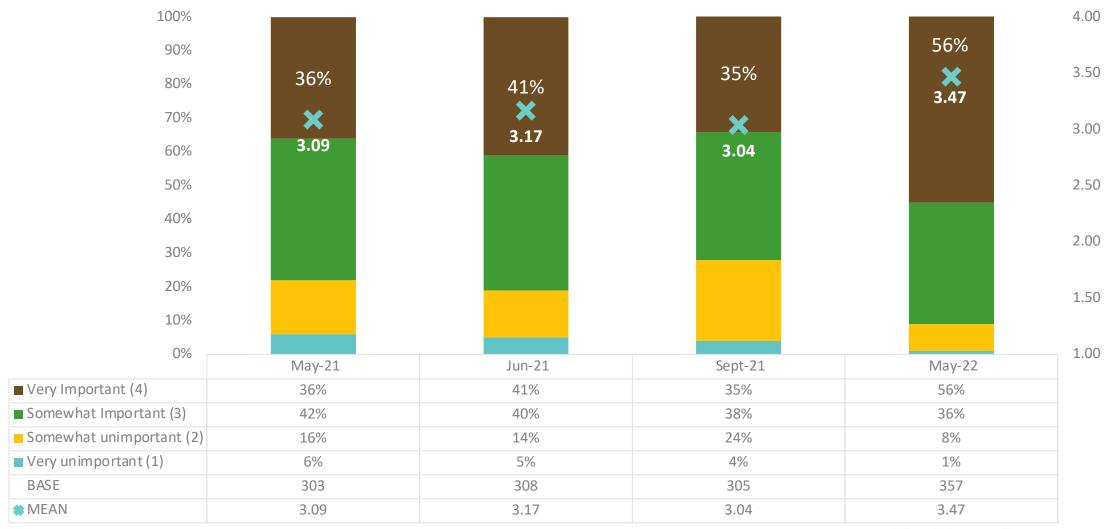








POST-COVID SELECTION FACTOR No quarantine of any kind for visitors

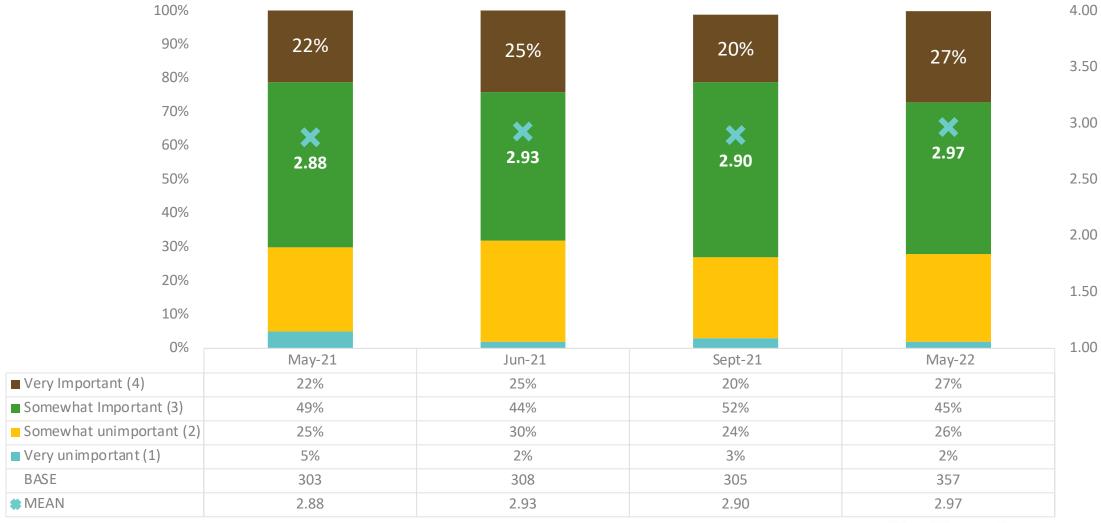








POST-COVID SELECTION FACTOR Secondary cities of interest

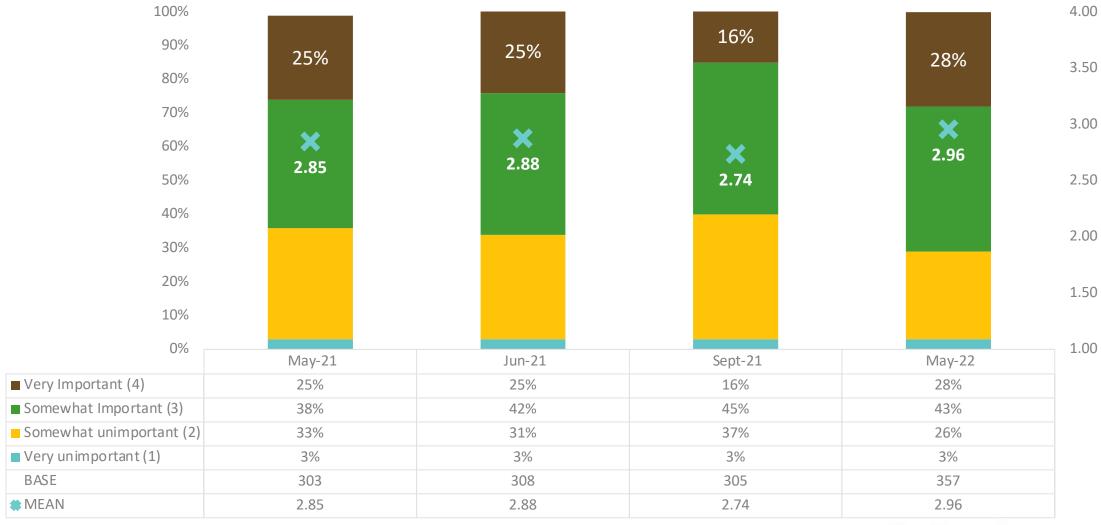








POST-COVID SELECTION FACTOR Relatively low population density

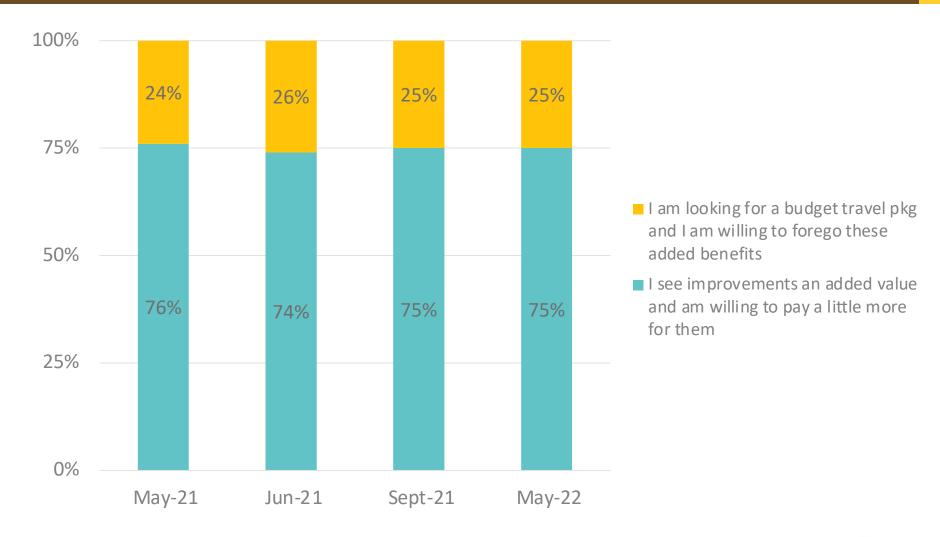








GUAM AIRPORT COVID-19 SAFETY MEASURES



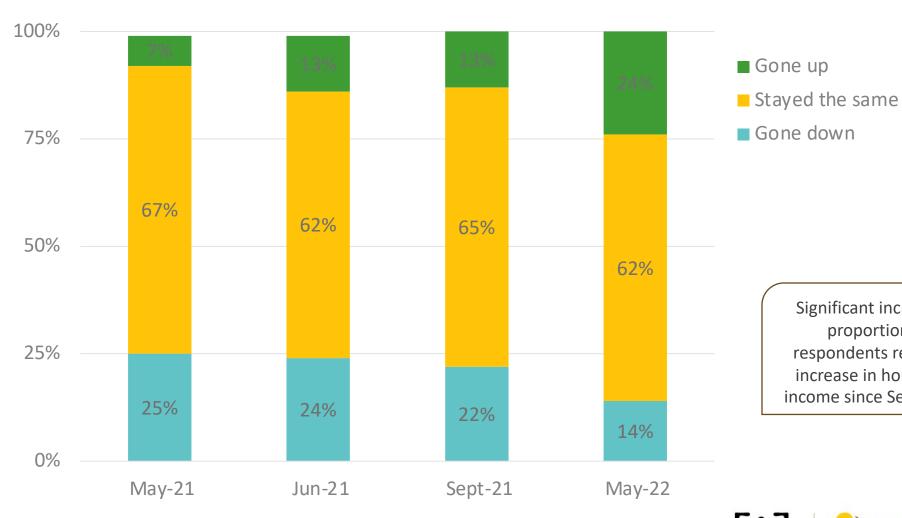
Q: In light of the COVID-19 pandemic, Guam has plans to implement numerous safety measures at the airport, including digital/touchless experience using kiosks and QR codes for the customers and border protection/ ESTA process. Which of the following best describes your reaction to these improvements?







CHANGES IN HOUSEHOLD INCOME DURING **PANDEMIC**

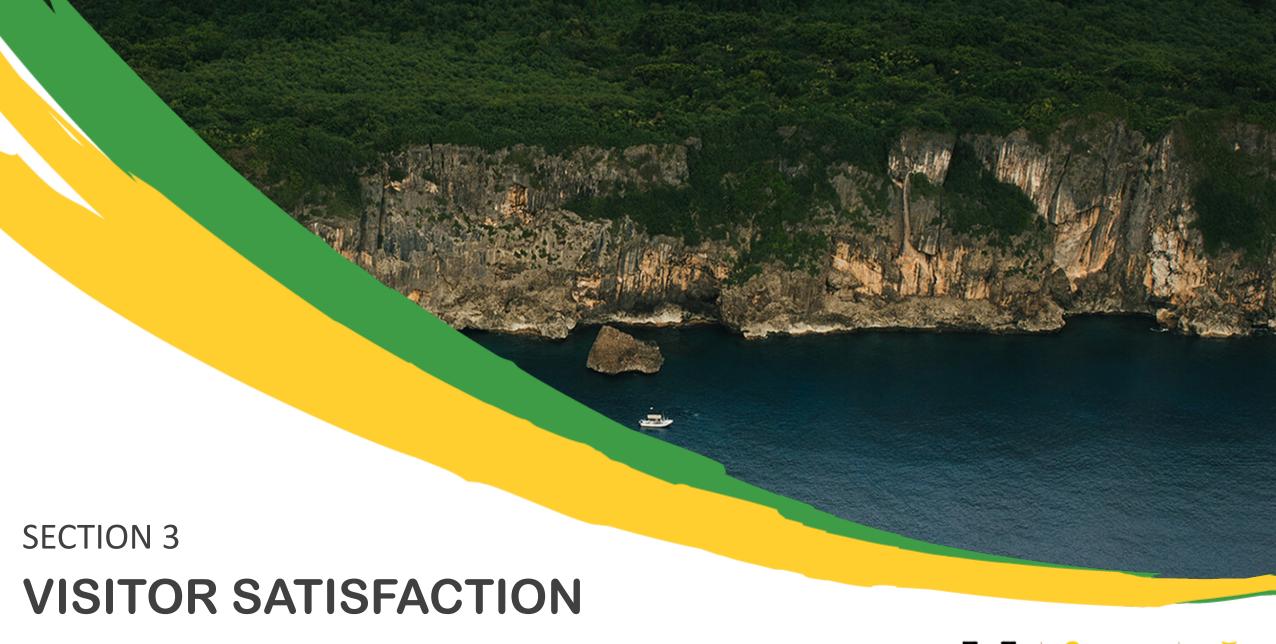


Significant increase in proportion of respondents reporting increase in household income since Sept. 2021.















OVERALL SATISFACTION – 10PT SCALE









PRIMARY TRAVEL MOTIVATION

	May 2021	June 2021	Sept 2021	May 2022
BASE	45	41	49	54
Vacation/ pleasure	80%	76%	84%	81%
Honeymoon	4%	7%	6%	6%
Visit family/ friends	13%	5%	4%	4%
Business/ conference/ convention/ trade show	-	2%	4%	2%
Incentive trip	-	-	2%	7%
Organized sporting activity/ event	-	7%	-	-
Attend school/ test/ career certification	2%	2%	-	-

Caution small base







TRAVEL MOTIVATIONS – TOP 3 Tracking

	May-21	Jun-21	Sept-21	May-22
BASE	45	41	49	54
Beautiful seas, beaches, tropical climate	44%	59%	57%	63%
Safe place to spend a vacation	42%	37%	57%	52%
Short travel time	27%	15%	35%	30%
Relaxation	27%	22%	24%	28%
A previous trip	27%	20%	18%	17%
Sightseeing	27%	27%	18%	17%
Recommendation from friend/ relative/ travel agency	13%	15%	18%	13%
Shopping	4%	7%	10%	11%
Price	11%	12%	10%	9%
Water activity	13%	22%	8%	9%

Caution small base







BRAND ADVOCACY – 10PT SCALE

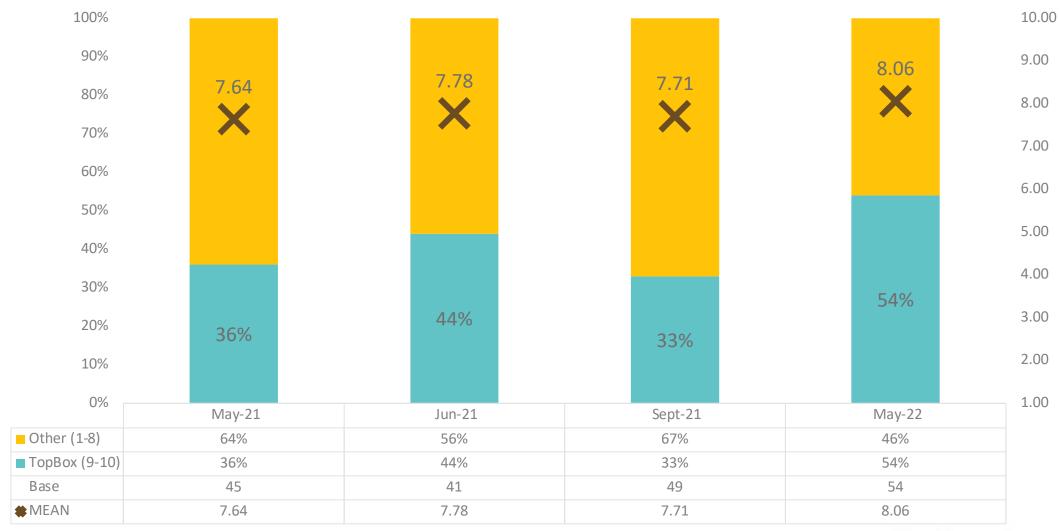








BRAND LOYALTY - 10PT SCALE









Caution

small

base

GUAM TRAVELER – TRIP MOTIVATIONS

	May 2021	June 2021	Sept 2021	May 2022
BASE	45	41	49	54
Nature/ natural beauty/ scenery	51%	49%	57%	41%
Beach/ocean	58%	46%	55%	52%
Weather/ climate/ good atmosphere/ fresh air	56%	44%	47%	43%
Relaxation	40%	46%	47%	31%
Safe environment	16%	29%	37%	19%
Event- celebrate/ family/ friends	18%	17%	24%	11%
Hotel/ accommodations	33%	24%	22%	33%
Sightseeing	27%	24%	22%	31%
Food – quality/ variety/ service	13%	27%	22%	28%
Local culture/ people/ music	24%	12%	22%	15%
Feeling the Hafa Adai spirit	20%	15%	20%	13%
Shopping	18%	15%	20%	17%
Variety of activities	16%	10%	20%	13%
Overall customer service	13%	2%	20%	19%

Caution small base







GUAM TRAVELERS – DRAWBACKS

	May 2021	June 2021	Sept 2021	May 2022
BASE	45	41	49	54
Ground transportation – limited options	31%	27%	35%	22%
Language barrier/ difficulty communicating	16%	20%	35%	11%
No negatives	22%	24%	18%	43%
Expensive	16%	27%	18%	11%
Health/ Safety/ COVID	20%	20%	18%	15%
Food – quality/ variety/ service	9%	20%	16%	4%
Traffic	11%	7%	12%	2%
Customer service	9%	2%	10%	4%
Lack of activities	7%	-	10%	11%
Immigration	20%	10%	10%	15%
Safety - other	16%	12%	8%	6%
Accommodations	9%	20%	6%	2%

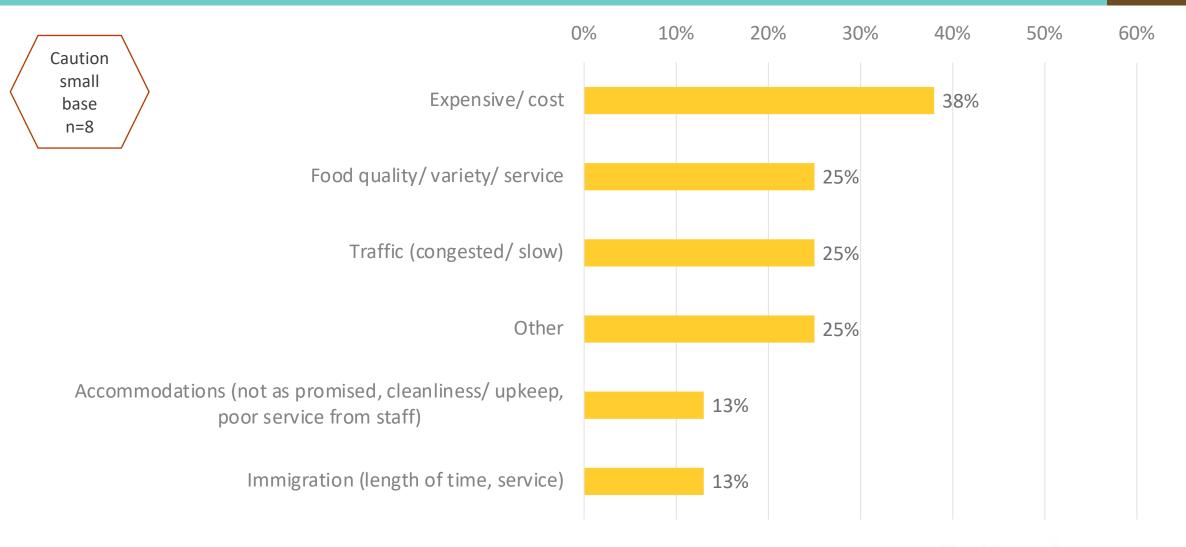
Caution small base







UNLIKELY TO RETURN – REASONS

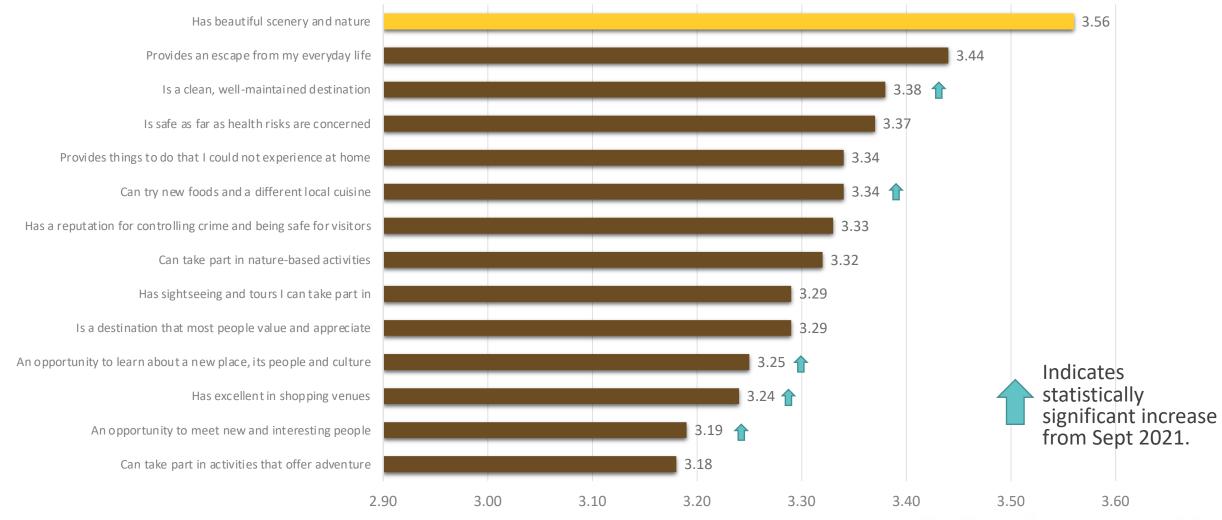








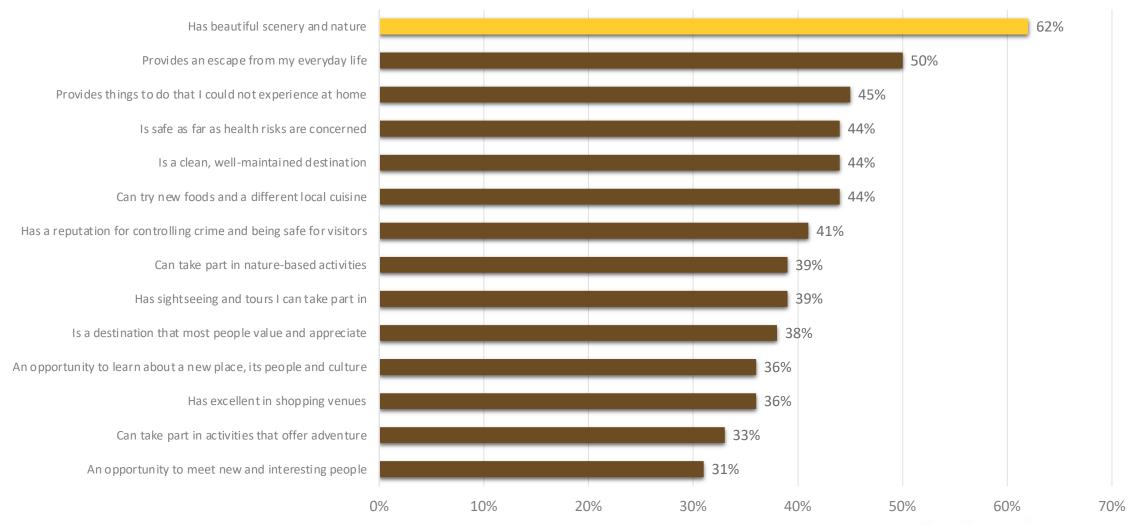
SELECTION FACTORS – SATISFACTION MEAN SCORES 4PT SCALE







SELECTION FACTORS – SATISFACTION TOP BOX (VERY GOOD)

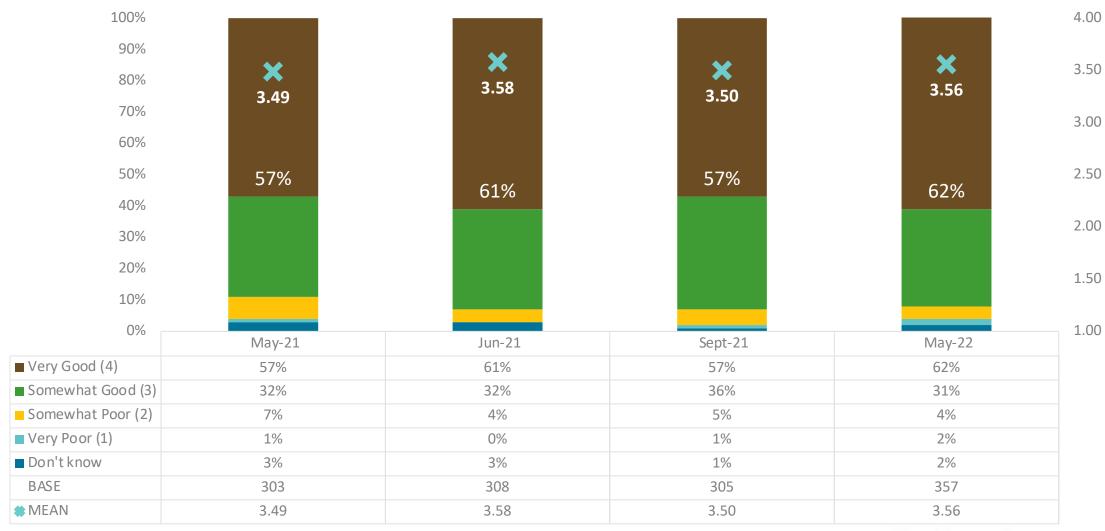








Has beautiful scenery and nature

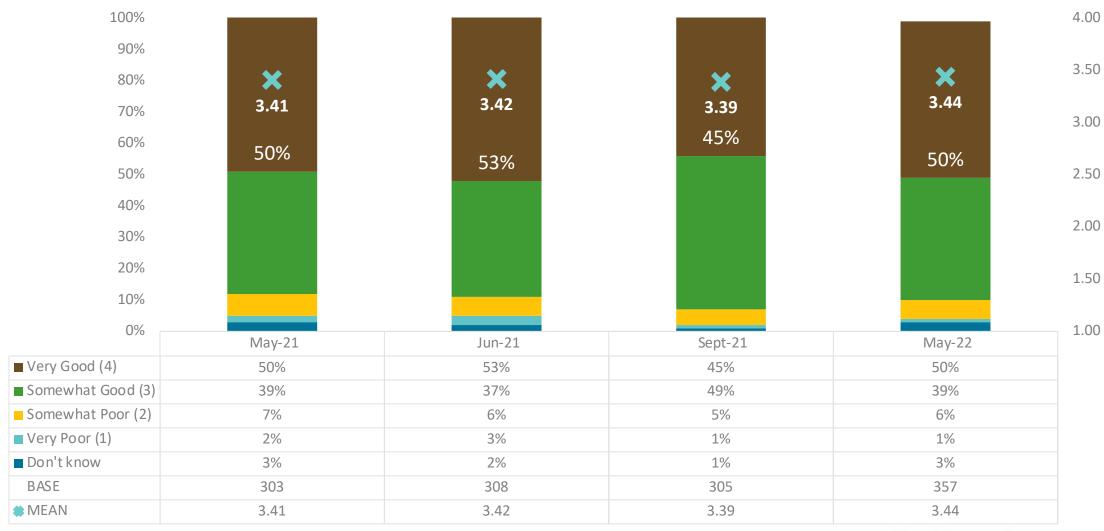








Provides an escape from my everyday life

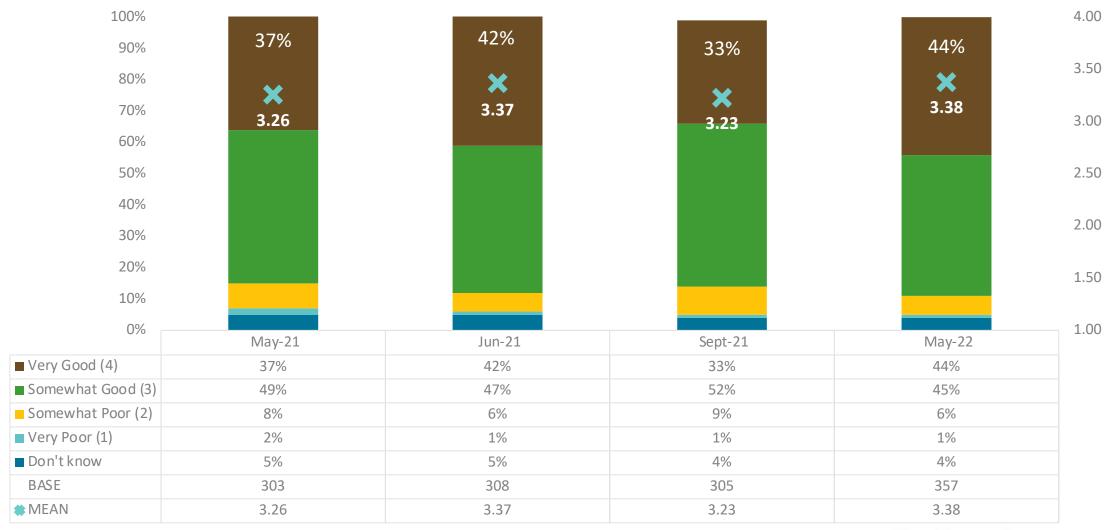








Is a clean, well-maintained destination

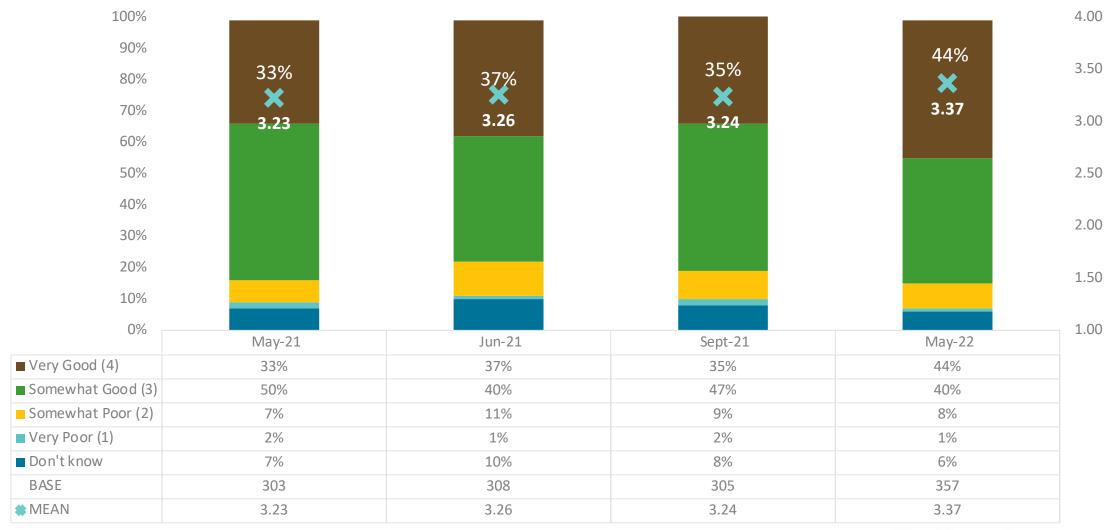








Is safe as far as health risks are concerned

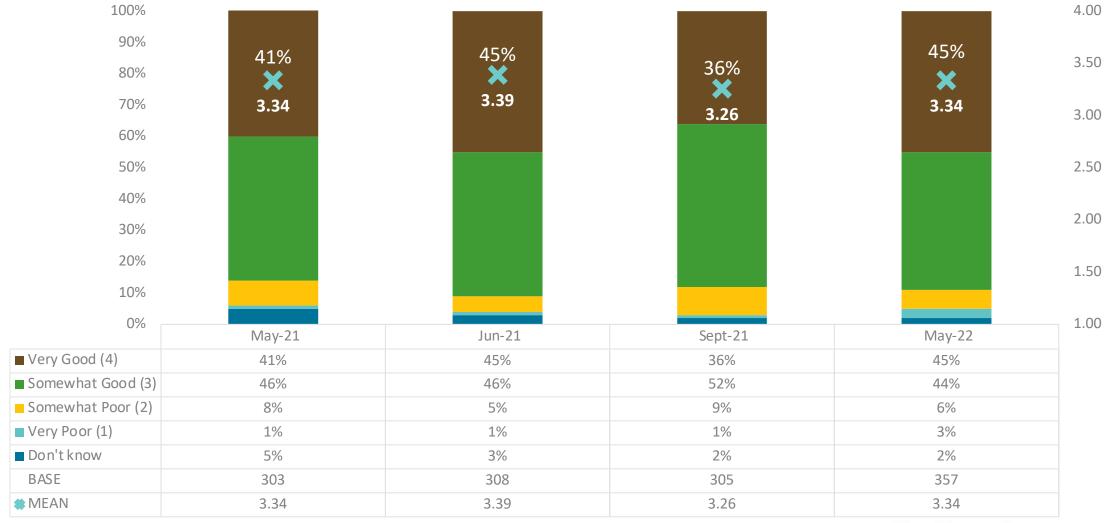








Provides things to do that I could not experience at home

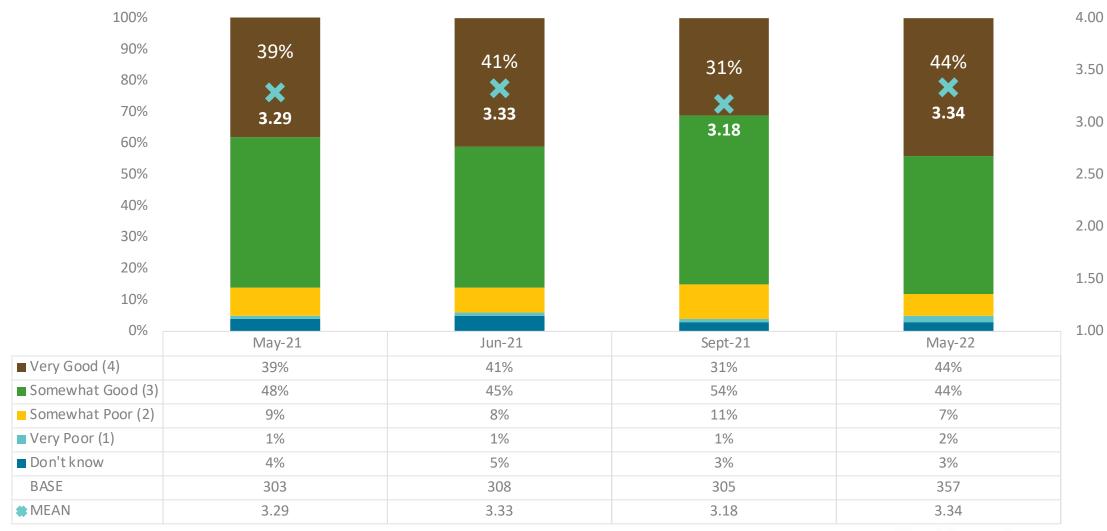








Can try new foods and a different local cuisine

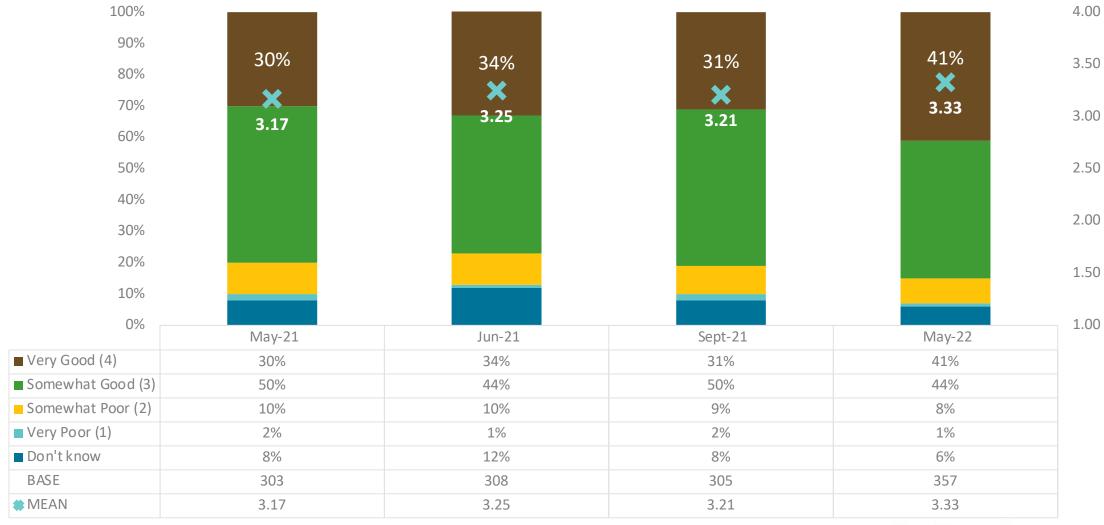








Has a reputation for controlling crime and being safe for visitors

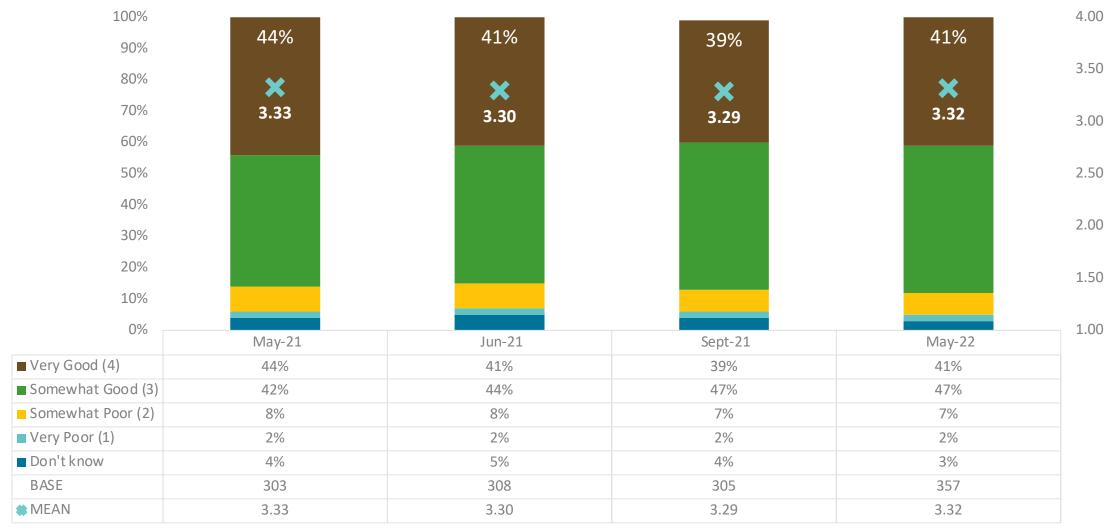








Can take part in nature-based activities

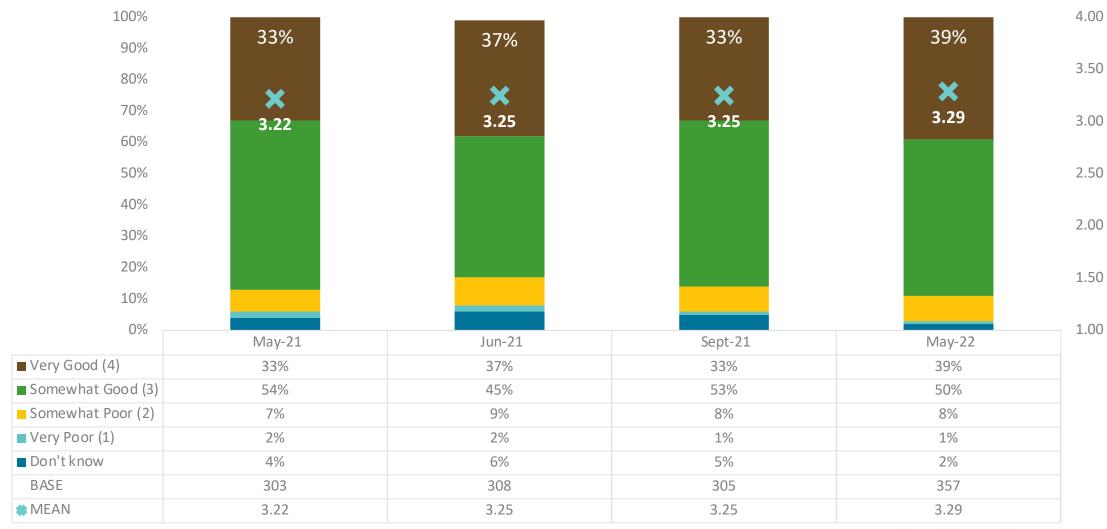








Has sightseeing and tours I can take part in

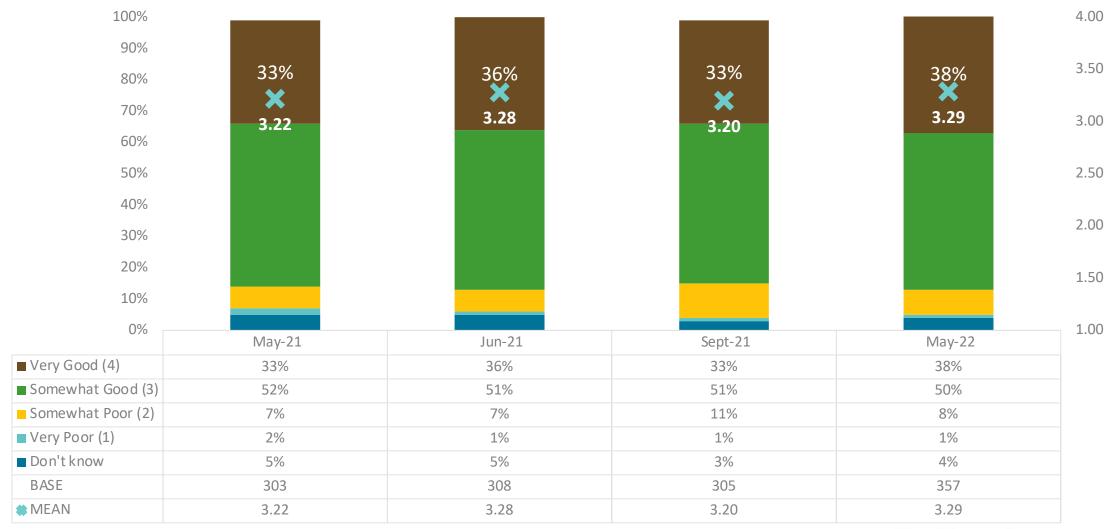








Is a destination that most people value and appreciate

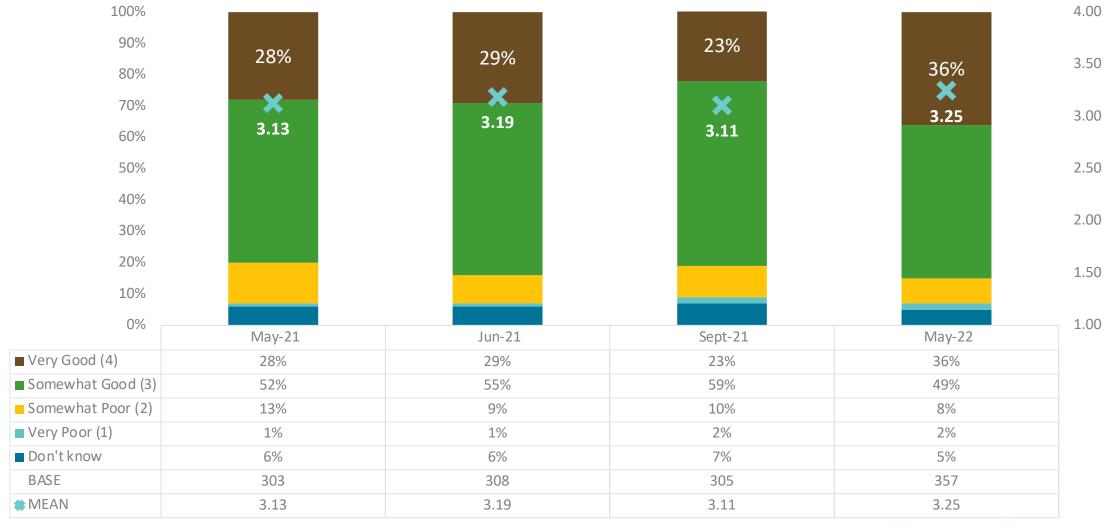








An opportunity to learn about a new place, its people and culture

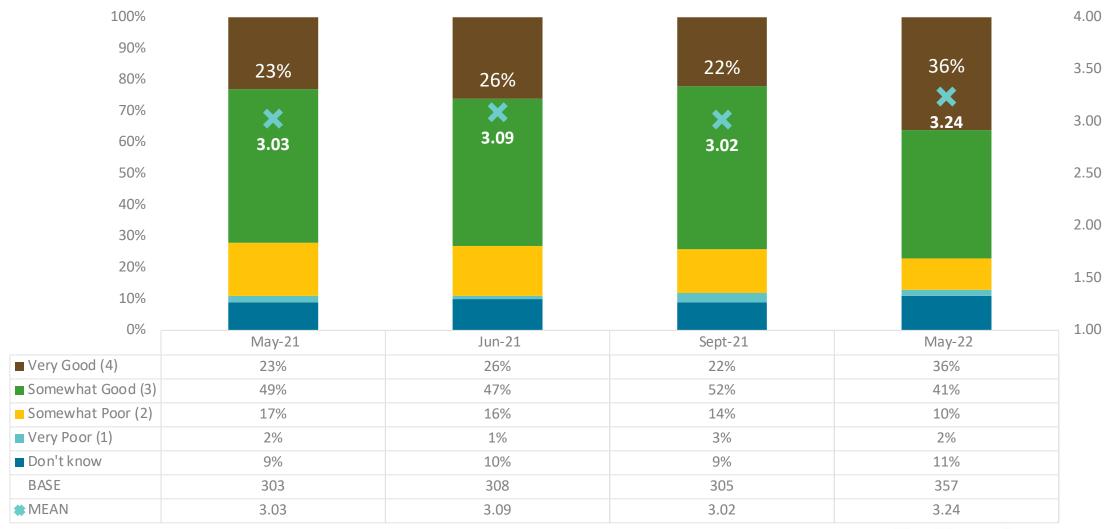








Has excellent shopping in venues

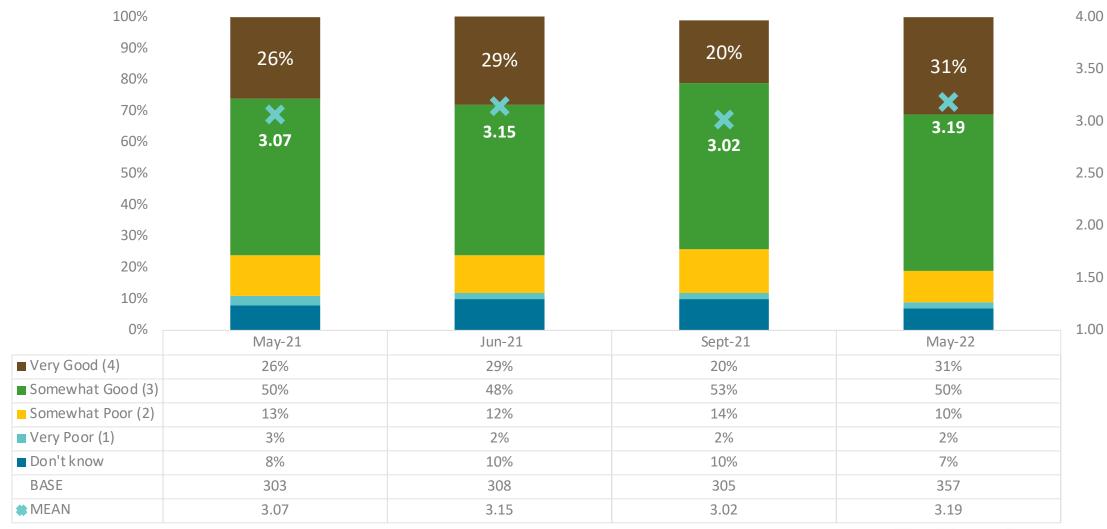








An opportunity to meet new and interesting people

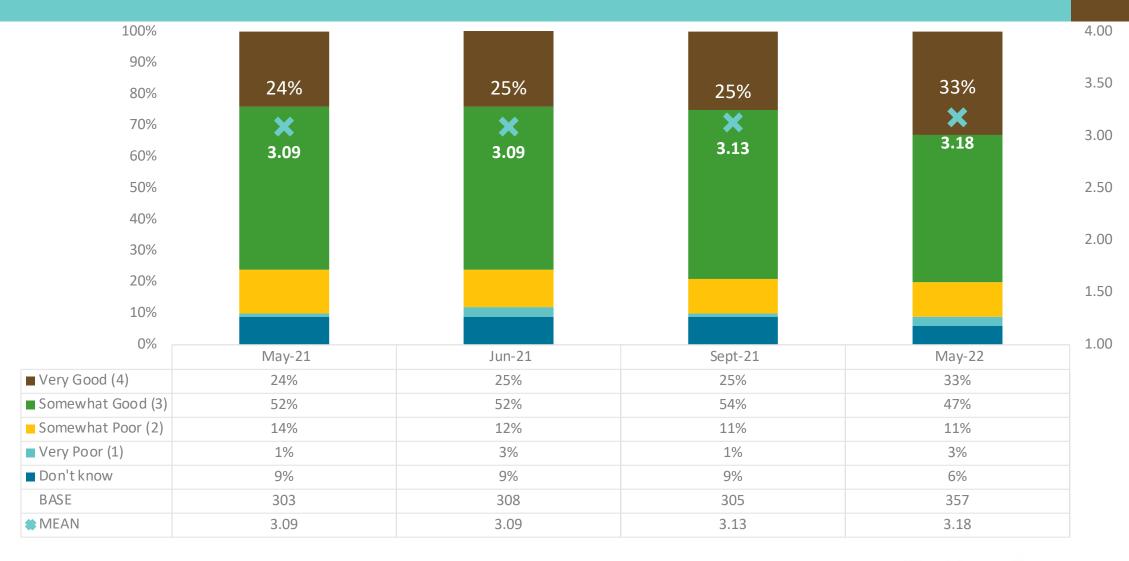








Can take part in activities that offer adventure









NEED-GAP ANALYSIS

KEY VULNERABILITY
HIGH IMPORTANCE
LOW VISITOR
SATISFACTION

STRATEGIC ADVANTAGE Has a reputation for controlling HIGH IMPORTANCE crime and being safe for visitors **HIGH VISITOR SATISFACTION** Provides an escape from my Is safe as far as everyday life health risks are concerned Has beautiful scenery and nature Can try new foods and a different local cuisine Provides things to do that I could not experience at home Is a clean, wellmaintained... Can take part in nature-based activities Is a destination that most people value and appreciate Has sightseeing and tours I can take part in

POTENTIAL VULNERABILITY
LOW IMPORTANCE
LOW VISITOR
SATISFACTION

Can take part in activities that offer adventure

An opportunity to meet new and

interesting people

An opportunity to learn about a new

place, its people and culture

POTENTIAL ADVANTAGE
LOW IMPORTANCE
HIGH VISITOR
SATISFACTION

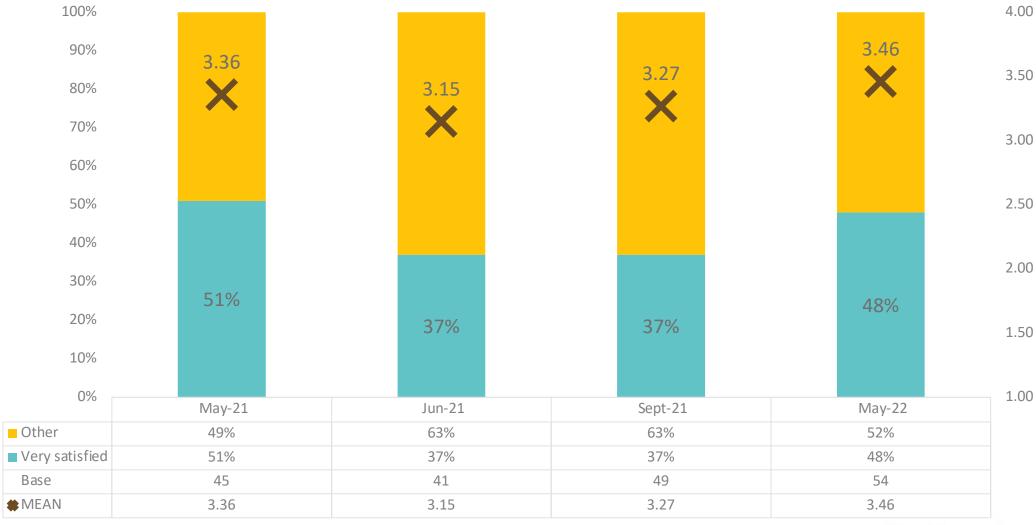






Has excellent in shopping venues

ACCOMMODATIONS – SATISFACTION 4PT RATING SCALE









Caution

small

QUALITY CUSTOMER SERVICE – SATISFACTION 4PT RATING SCALE





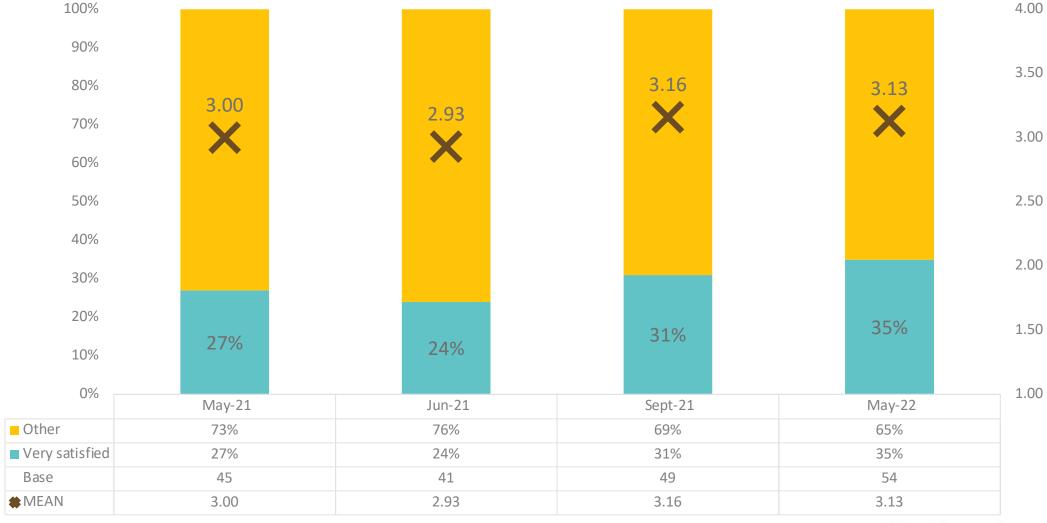




Caution

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TRANSPORTATION OPTIONS – SATISFACTION 4PT RATING SCALE





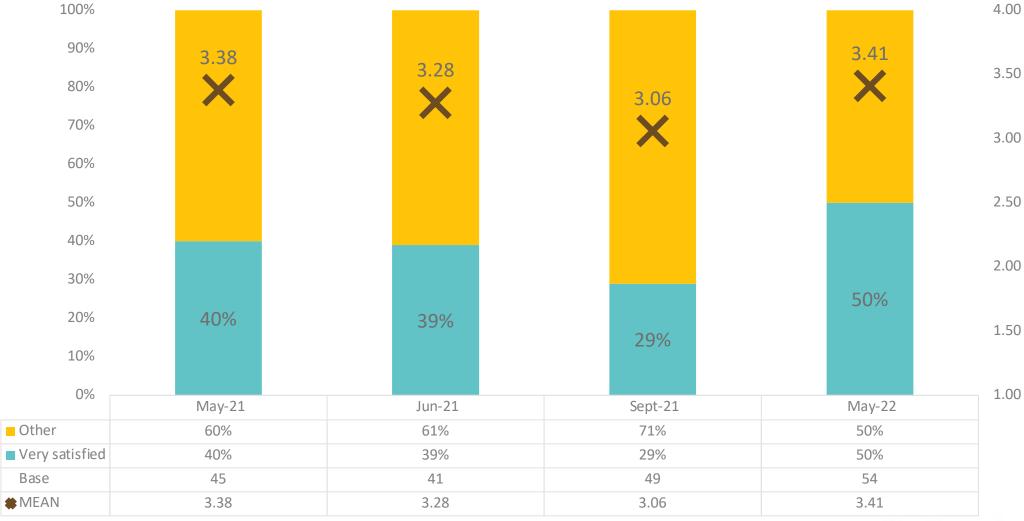




Caution

small base

VISITORS FEEL WELCOME – SATISFACTION 4PT RATING SCALE





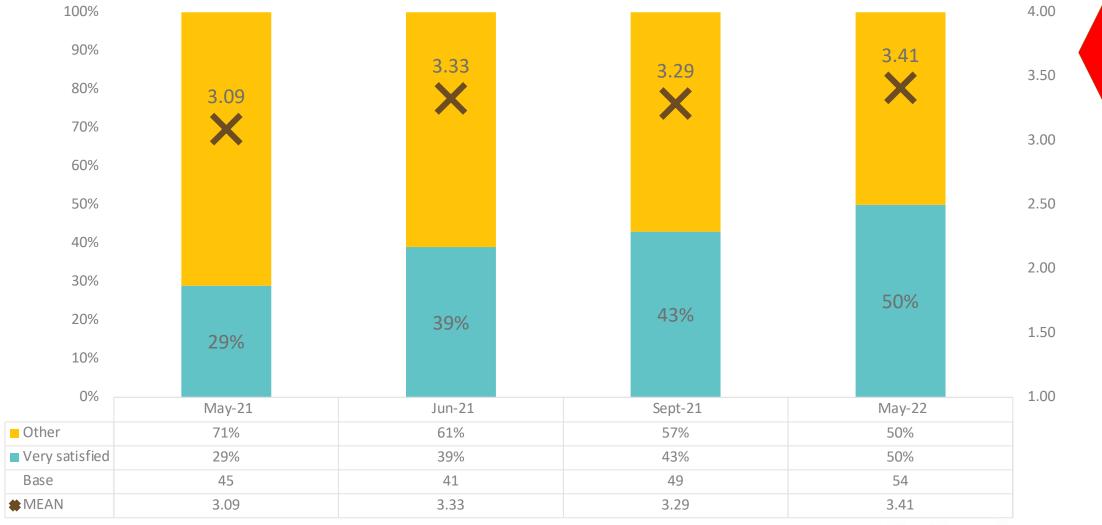




Caution

small

VARIETY OF ACTIVITIES – SATISFACTION 4PT RATING SCALE





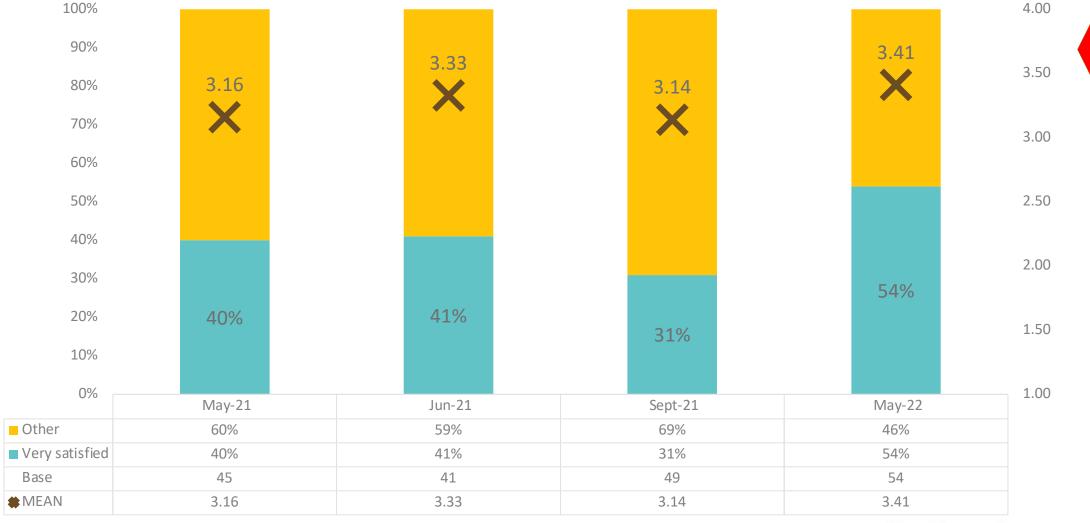




Caution

small

SHOPPING OPTIONS – SATISFACTION 4PT RATING SCALE





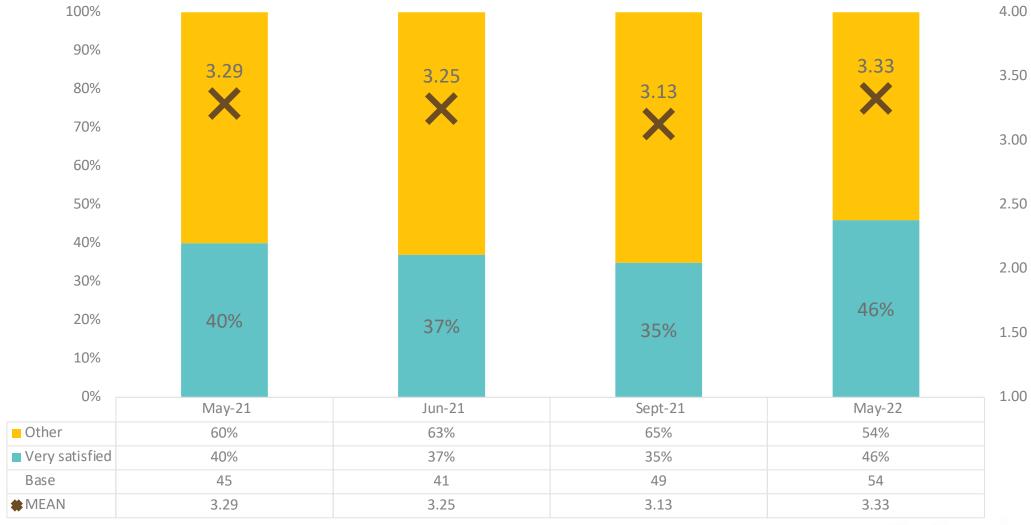




Caution

small

OVERALL VALUE – SATISFACTION 4PT RATING SCALE







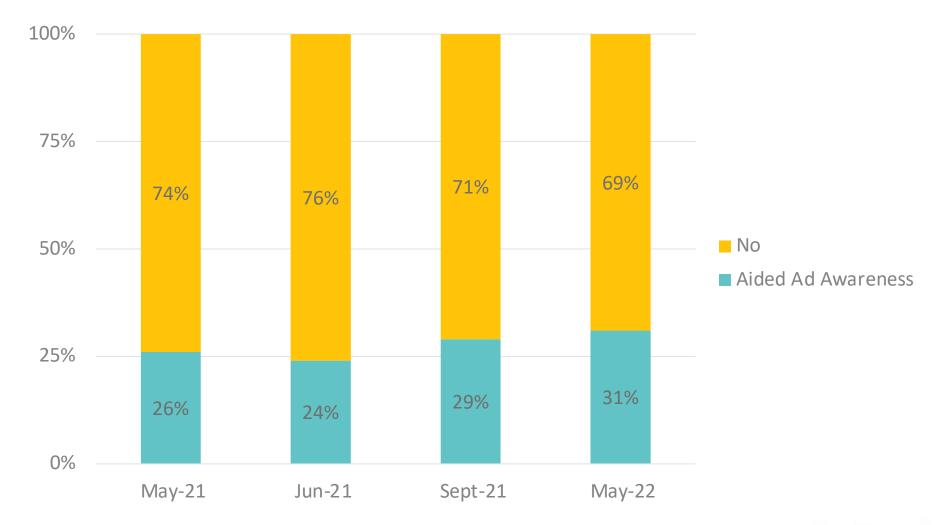


Caution

small



AIDED ADVERTISING AWARENESS









SOURCES OF INFORMATION ABOUT GUAM

	May 2021	June 2021	Sept 2021	May 2022
BASE	45	41	49	54
Recommendations from family and friends	31%	41%	29%	19%
Social media	16%	20%	8%	17%
Travel guide website	18%	15%	22%	20%
Television	20%	12%	22%	28%
Travel agents	7%	10%	8%	13%
GVB website	7%	-	6%	2%
Other	2%	-	2%	2%
Radio	-	2%	2%	-

Caution small base







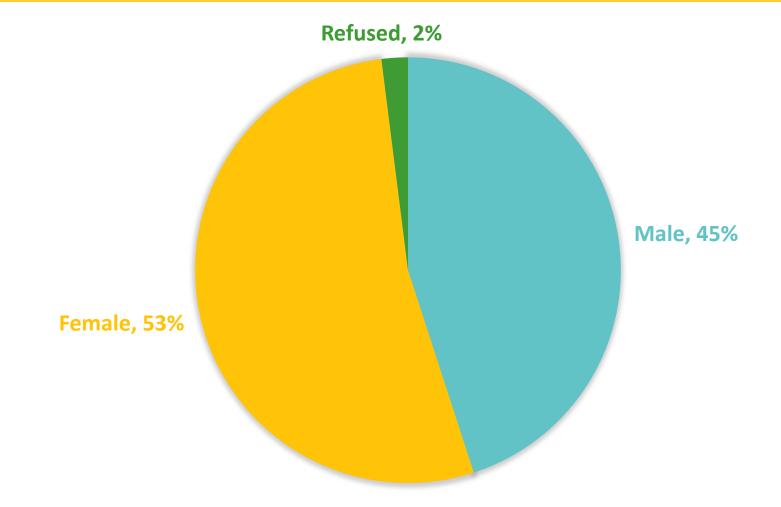








GENDER

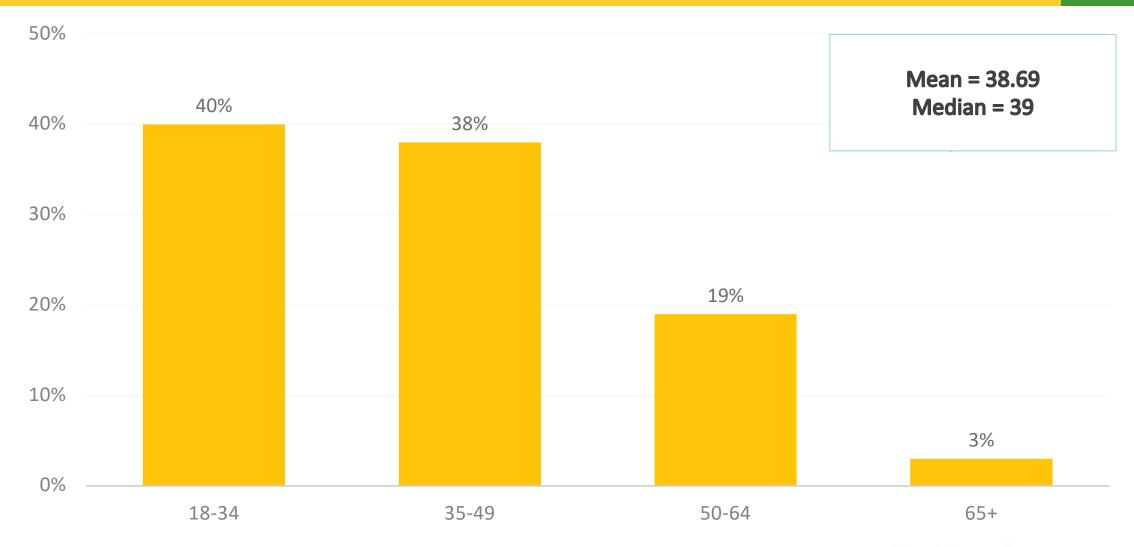








AGE

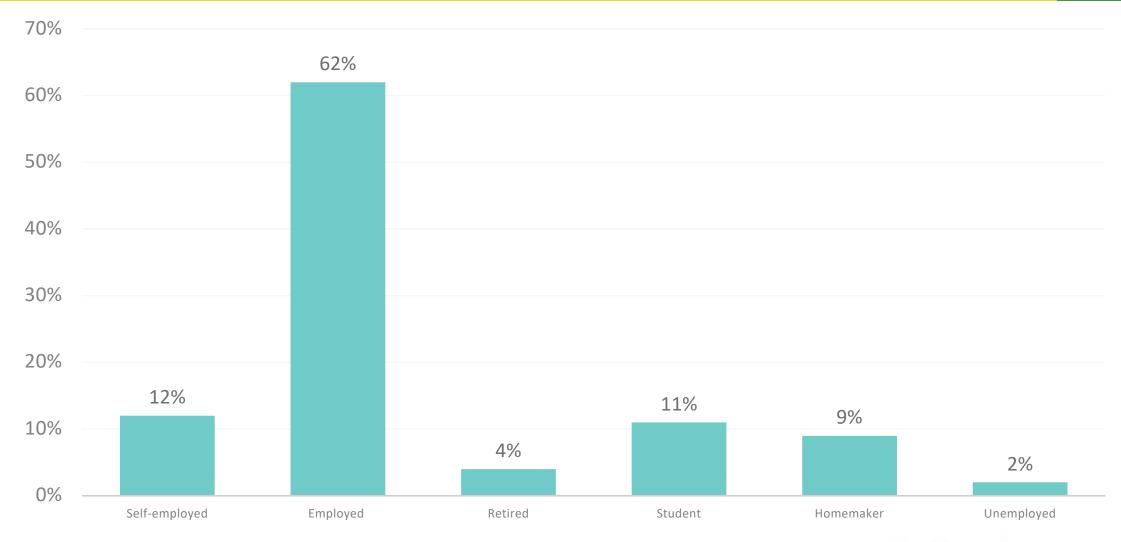








EMPLOYMENT STATUS

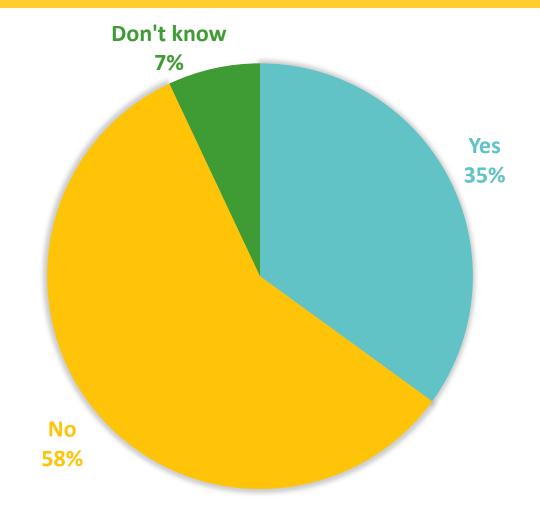








INCENTIVE TRIPS

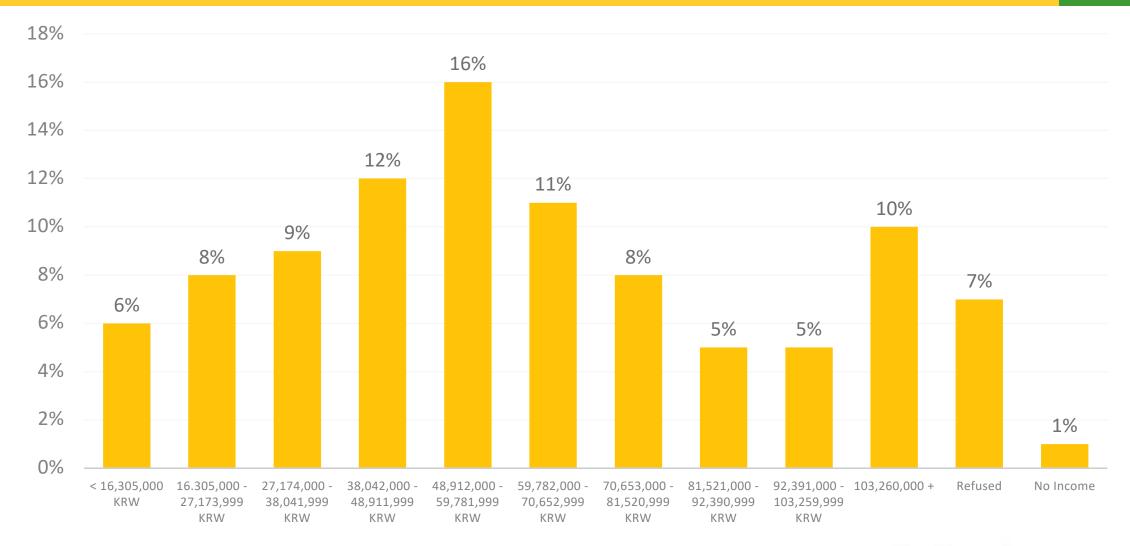








HOUSEHOLD INCOME









TRIPS TO GUAM









Caution

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INTERNATIONAL TRAVEL – Trips in last five years

