

Guam Visitors Bureau

Korea Visitor Tracker Exit Profile

FY2018 DATA AGGREGATION

Prepared by: Anthology Research

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#instaGuam



Background and Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Anthology's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **4240** departing Korean visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **4240** is +/- 1.51 percentage points with a 95% confidence level. That is, if all Korean visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 1.51 percentage points.

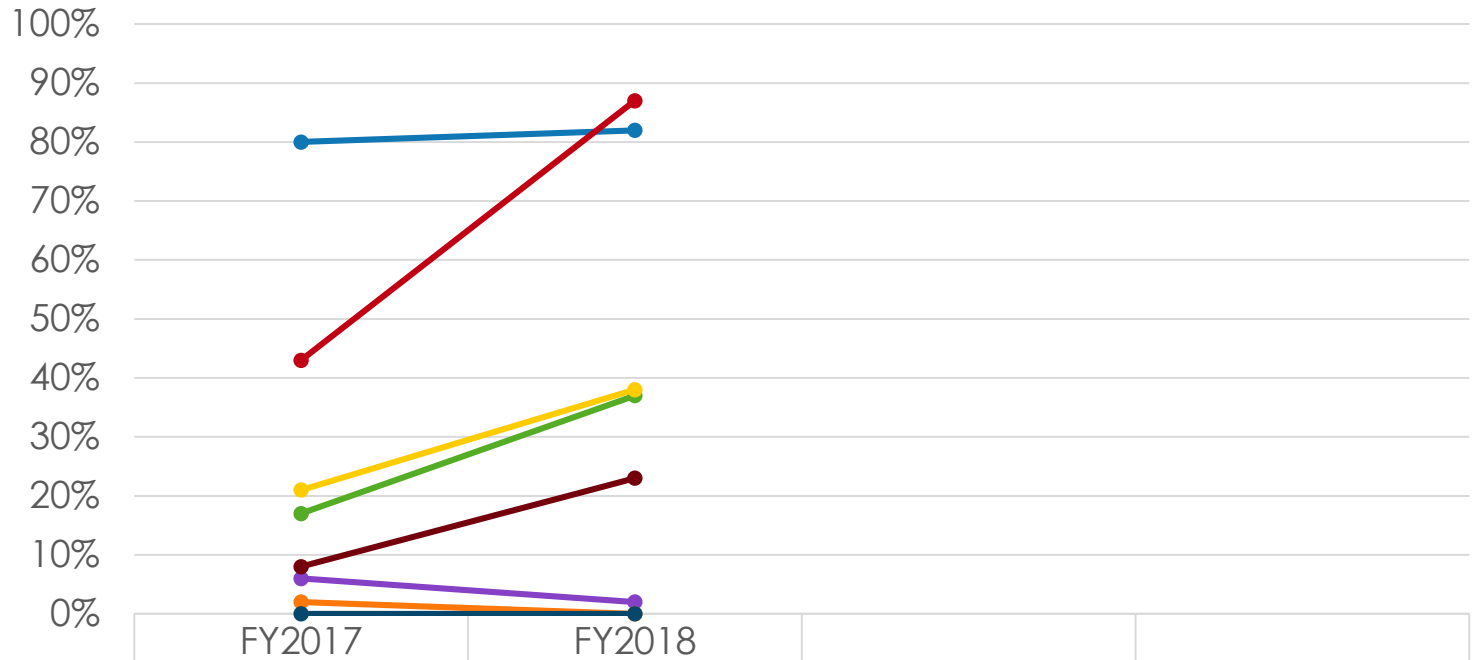
Objectives

- To monitor the effectiveness of the Korea seasonal campaigns in attracting Korean visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Korea marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

Key Highlighted Segments

- **The specific objectives were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families (Q6)
 - FITS (Q7)
 - MICE (Q5A Convention/ Conference/ Trade Show/ Company sponsored)
 - Leisure Traveler (Q5A Here to relax/ Here to see beaches, tropical climate, here for pleasure)
 - Wedding (Q5A)
 - Honeymoon (Q5A)
 - Group Tour (Q7)
 - Repeat Visitor (Q3A)
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Korean visitors) the most important determinants of on-island spending

Key Highlighted Segments

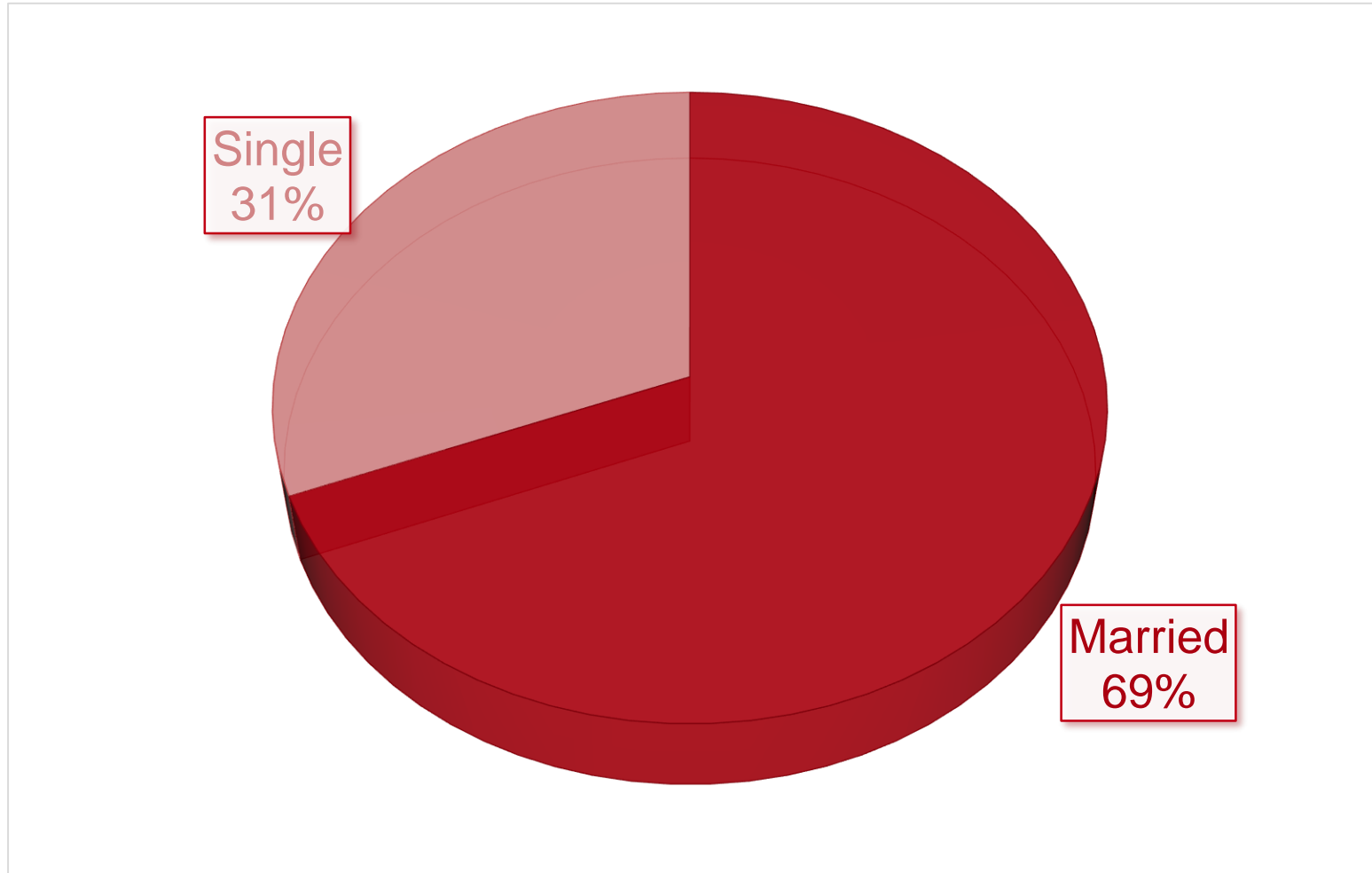


	FY2017	FY2018		
Leisure Traveler	80%	82%		
Family	43%	87%		
Repeat	17%	37%		
FIT	21%	38%		
Honeymoon	6%	2%		
MICE	2%	0%		
Wedding	0%	0%		
Group	8%	23%		

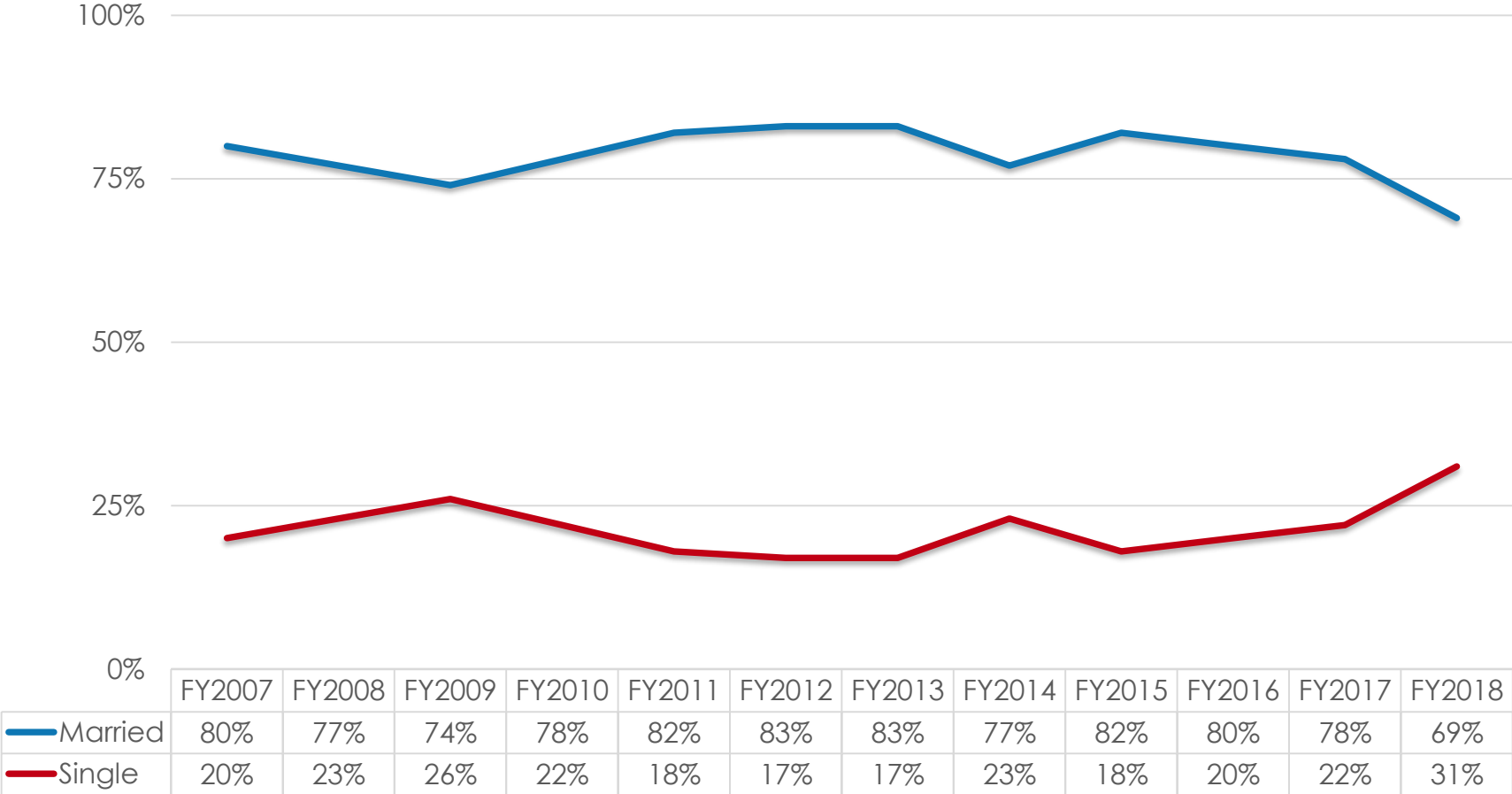
SECTION 1

PROFILE OF RESPONDENTS

Marital Status

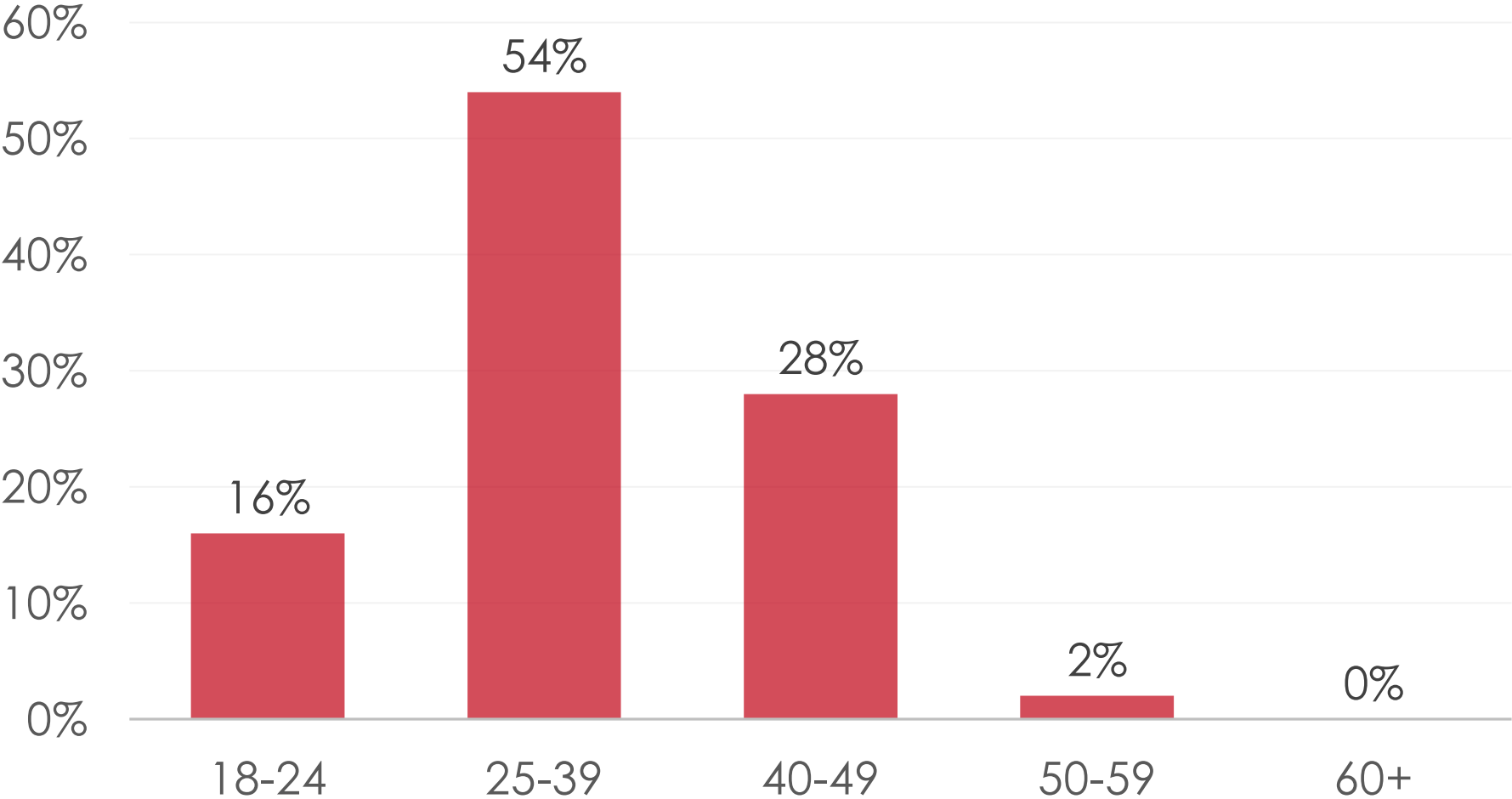


Marital status – Tracking

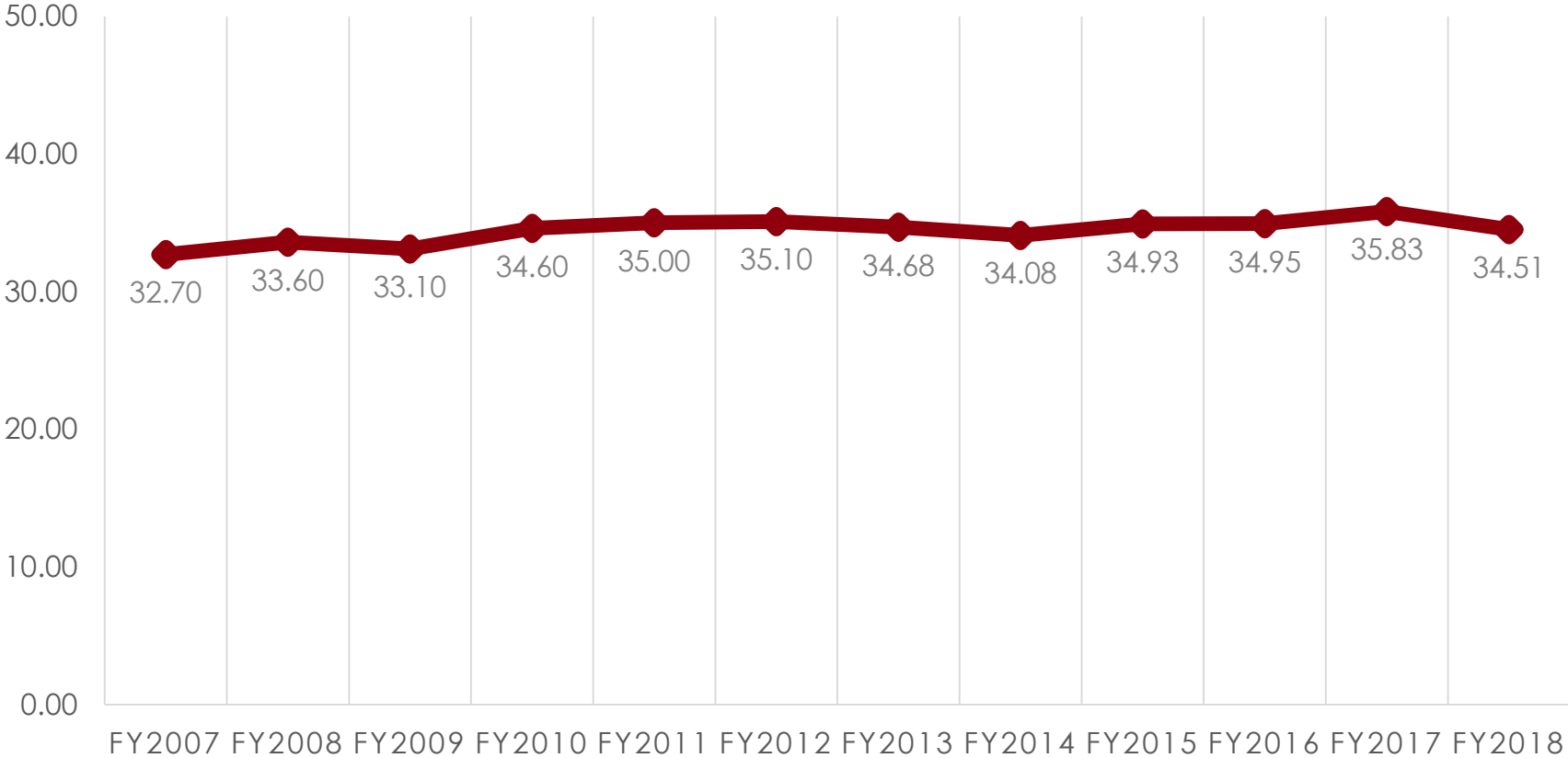


Age

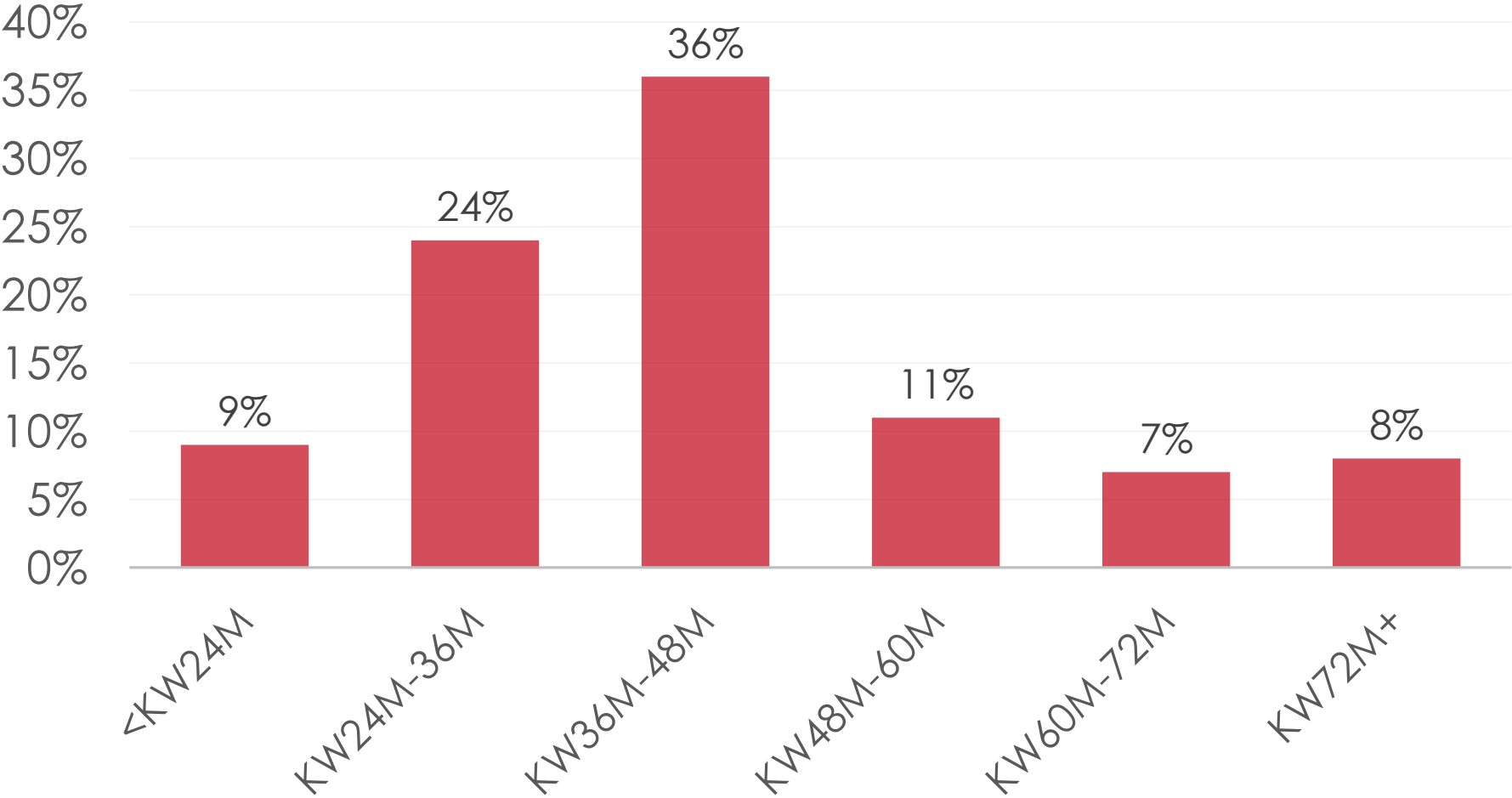
MEAN = 34.51
MEDIAN = 35



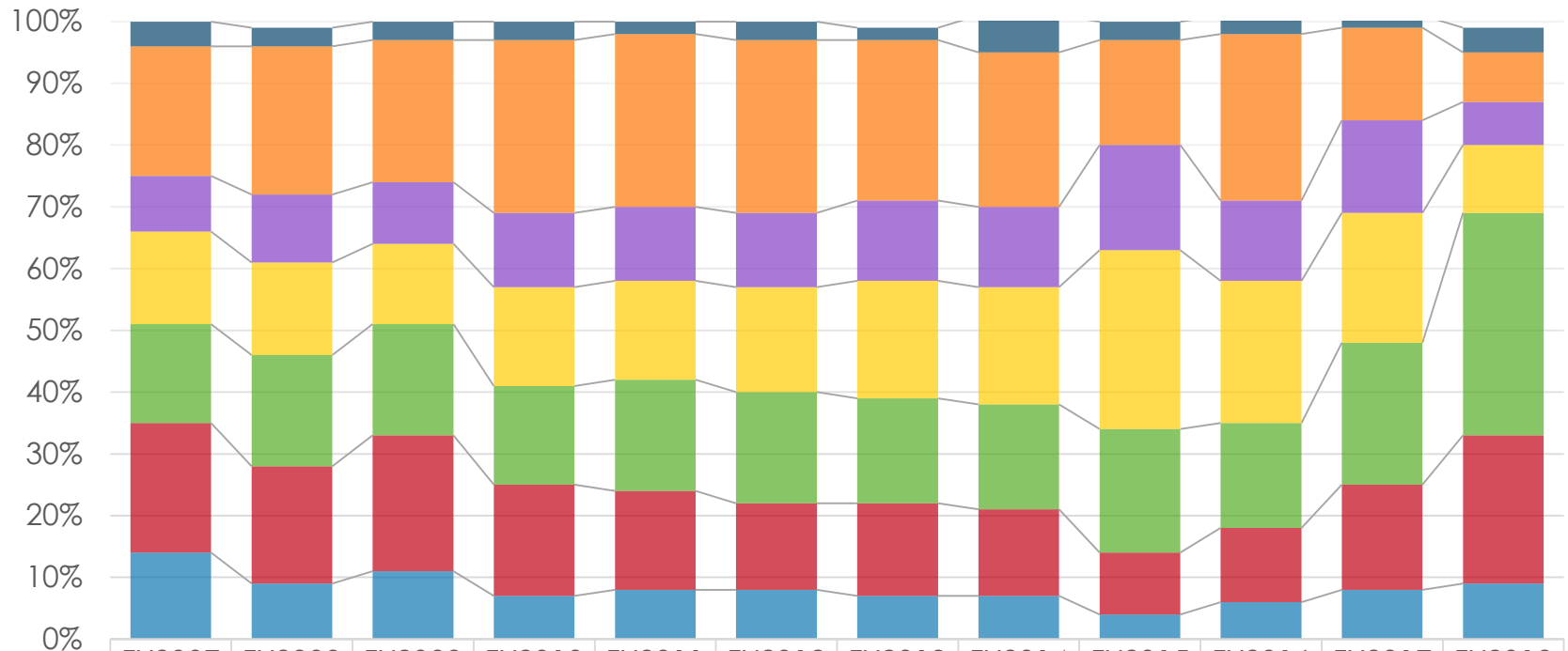
Age – Tracking



Annual Household Income

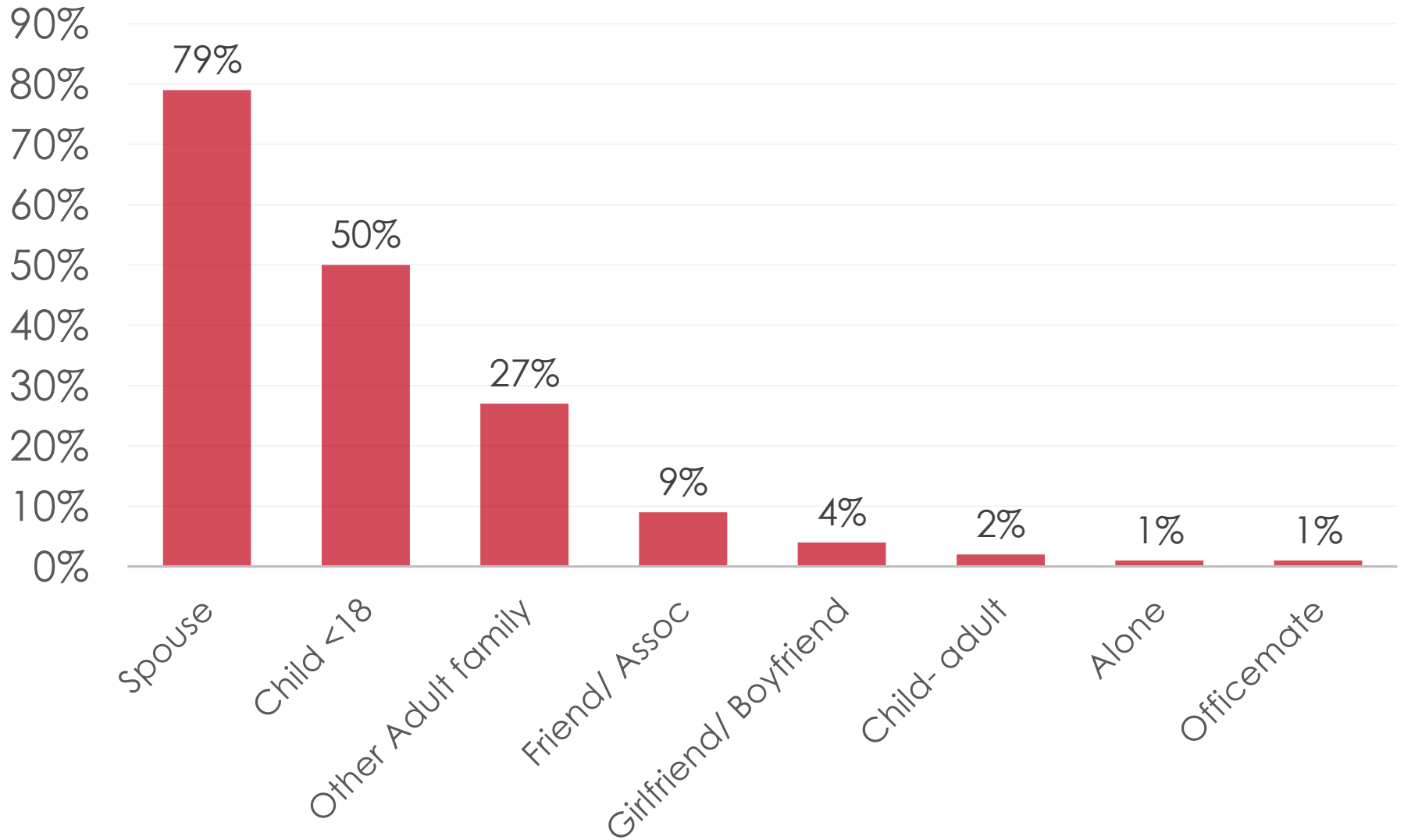


Annual Household Income - Tracking

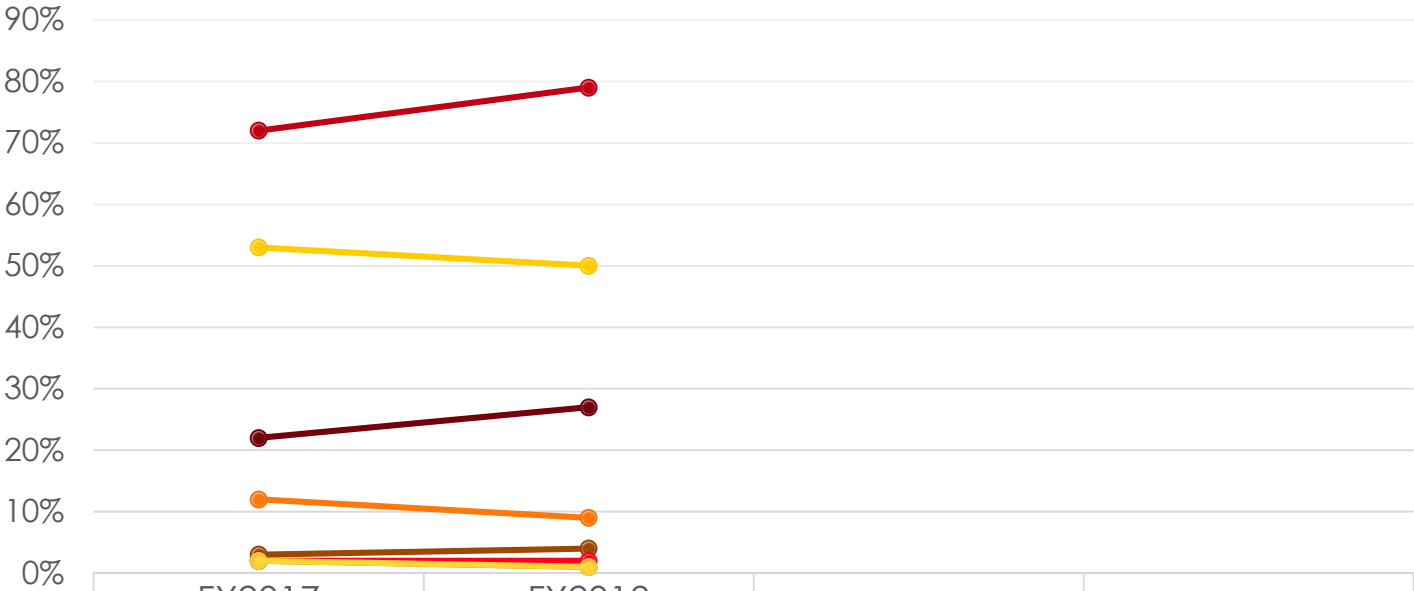


	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
■ Rf	4%	3%	3%	3%	2%	3%	2%	6%	3%	3%	2%	4%
■ KW72M+	21%	24%	23%	28%	28%	28%	26%	25%	17%	27%	15%	8%
■ KW60M-72	9%	11%	10%	12%	12%	12%	13%	13%	17%	13%	15%	7%
■ KW48M-60	15%	15%	13%	16%	16%	17%	19%	19%	29%	23%	21%	11%
■ KW36M-48	16%	18%	18%	16%	18%	18%	17%	17%	20%	17%	23%	36%
■ KW24M-36	21%	19%	22%	18%	16%	14%	15%	14%	10%	12%	17%	24%
■ <KW24M	14%	9%	11%	7%	8%	8%	7%	7%	4%	6%	8%	9%

Travel Party



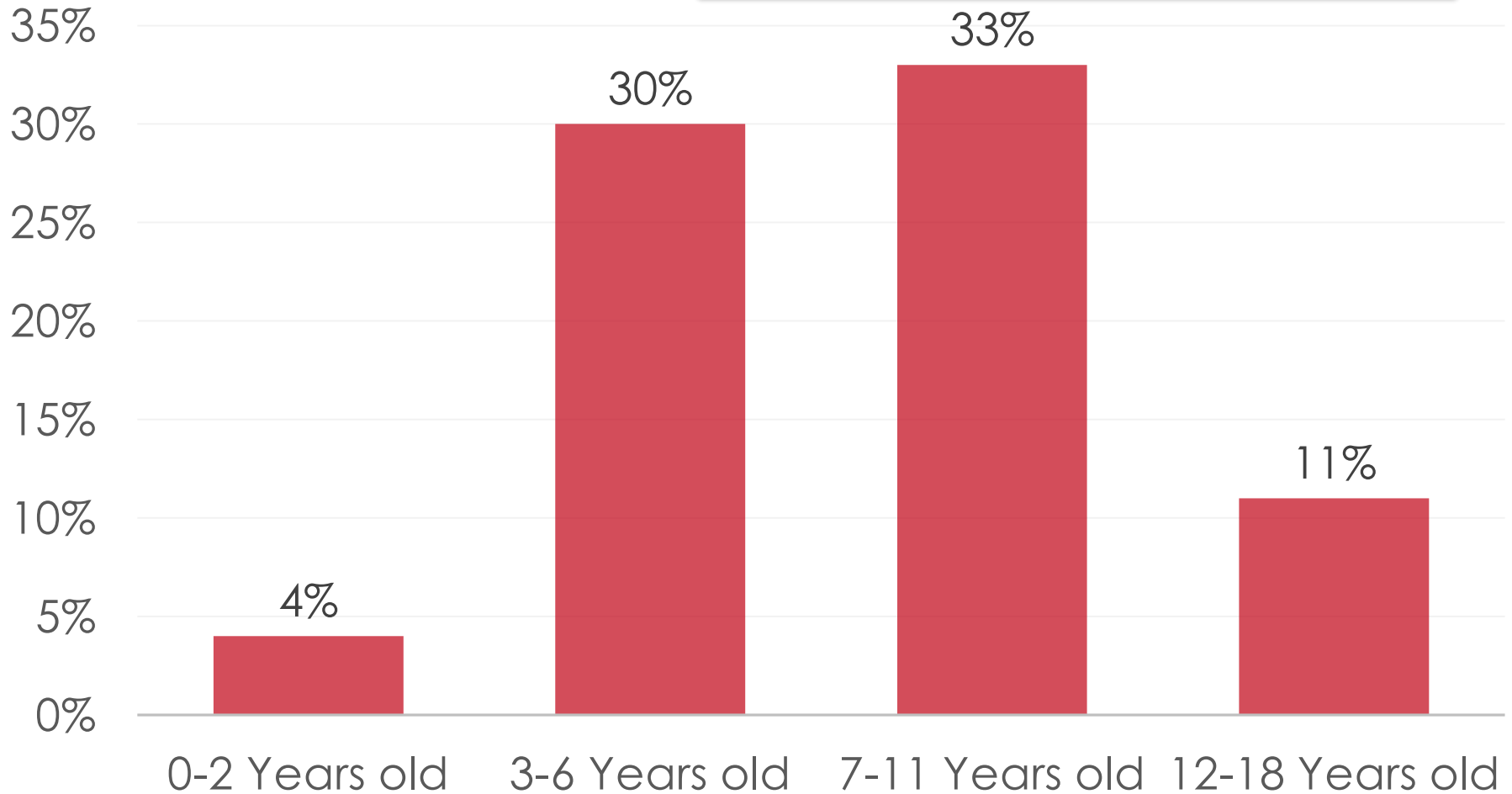
Travel Party



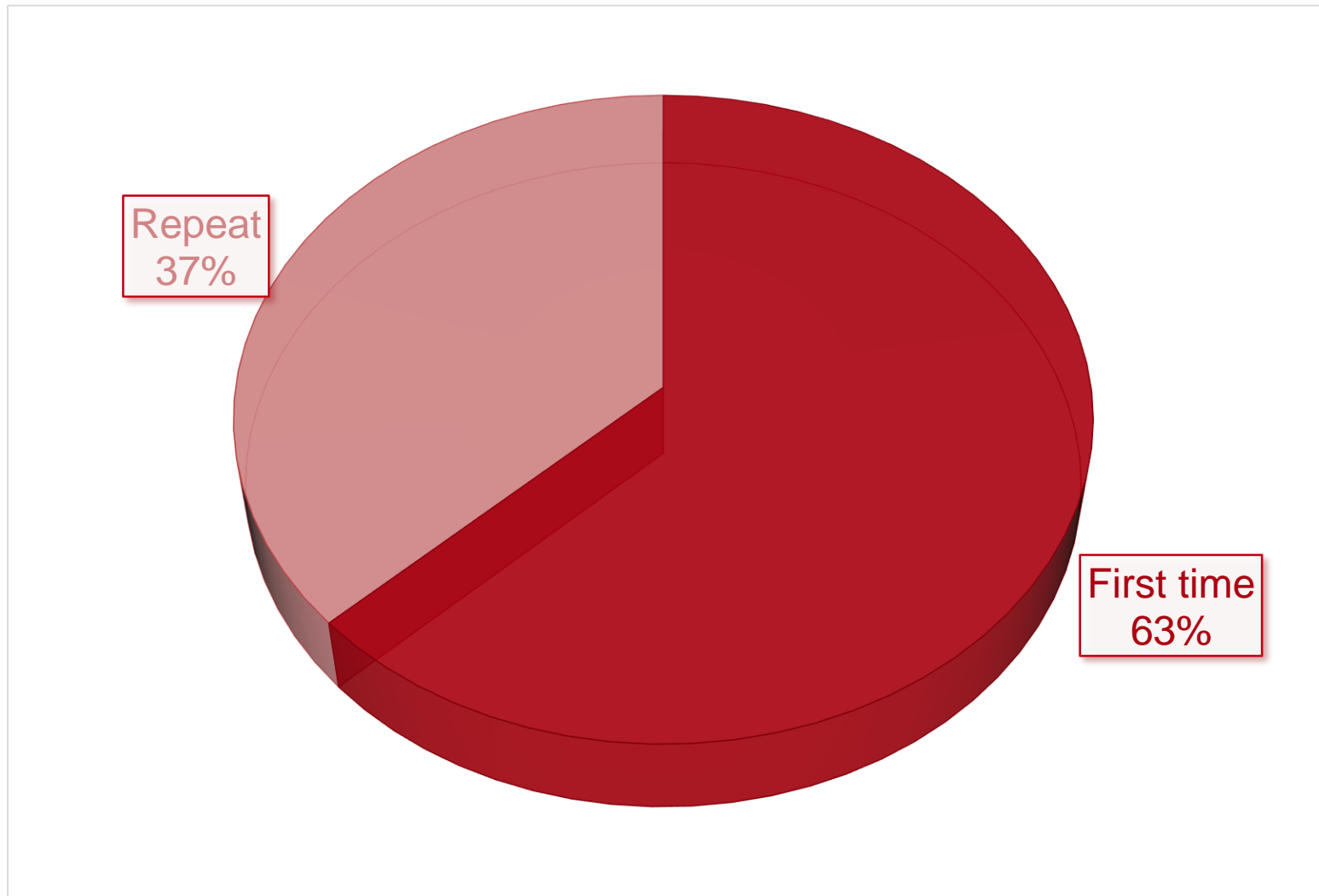
	FY2017	FY2018		
Spouse	72%	79%		
Child <18	53%	50%		
Friend/ Assoc	12%	9%		
Other Adult Family	22%	27%		
Alone	2%	1%		
Girlfriend/ Boyfriend	3%	4%		
Child- Adult	2%	2%		
Office	2%	1%		

Travel Party - Children

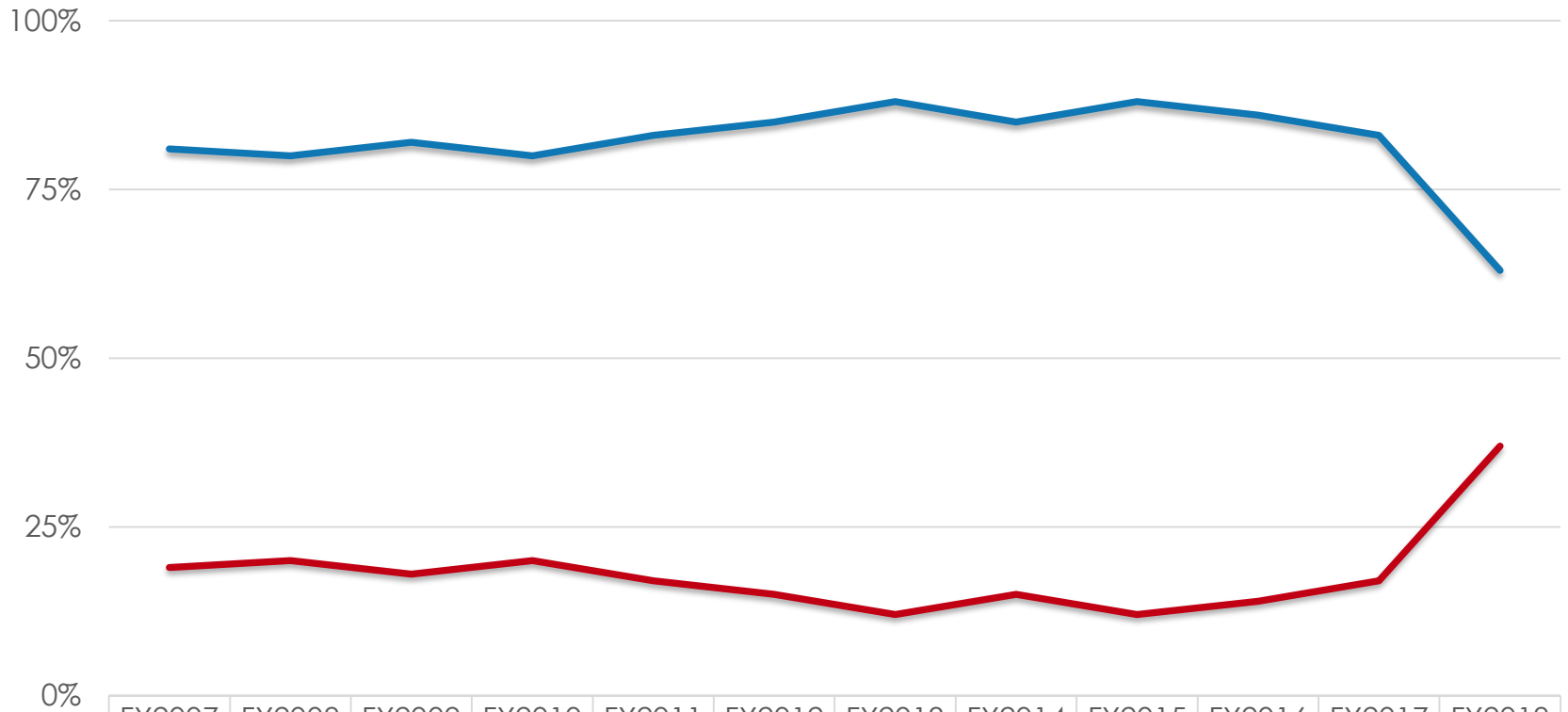
50% TRAVELING WITH A CHILD



Trips to Guam



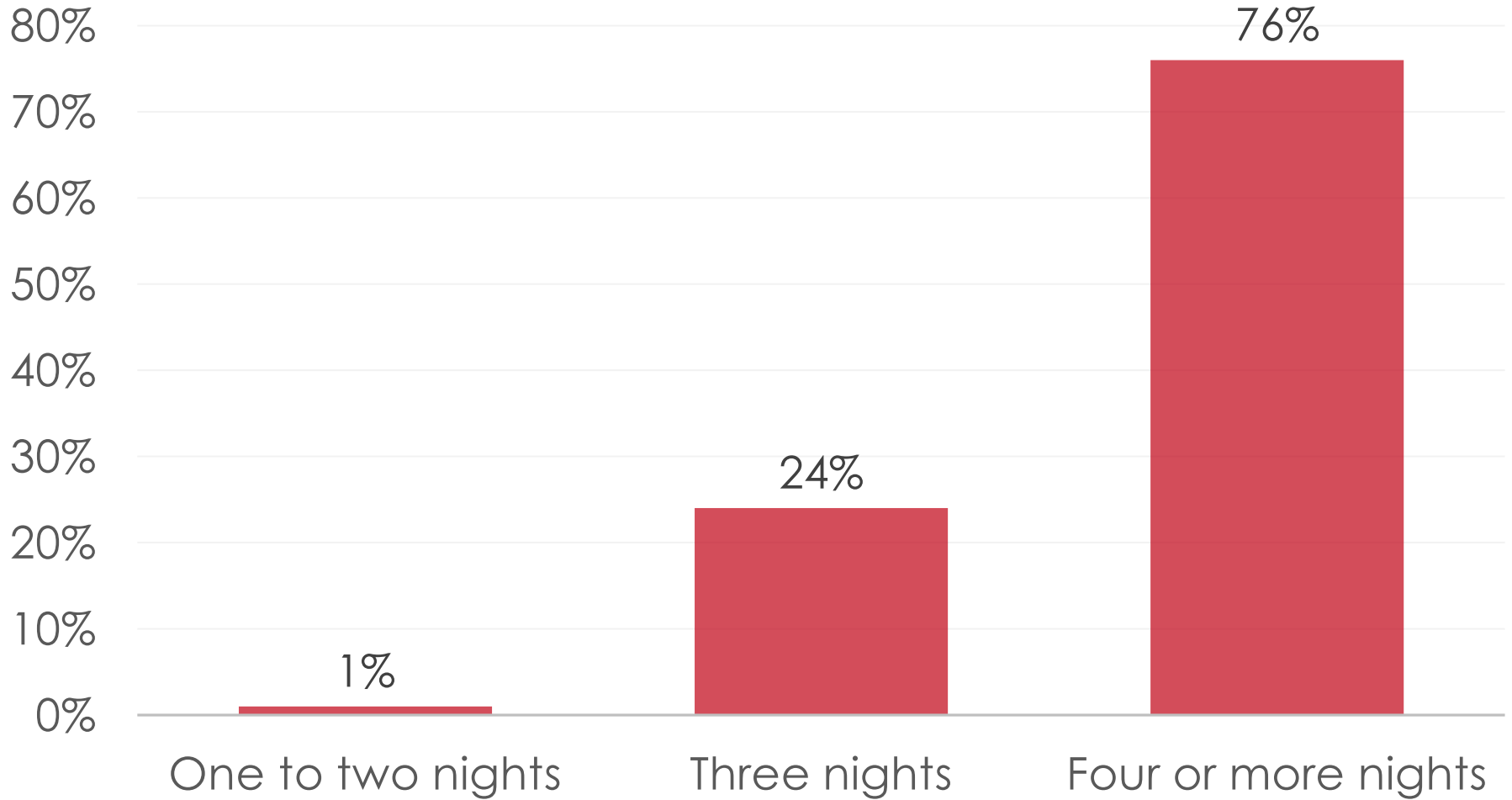
Trips to Guam – Tracking



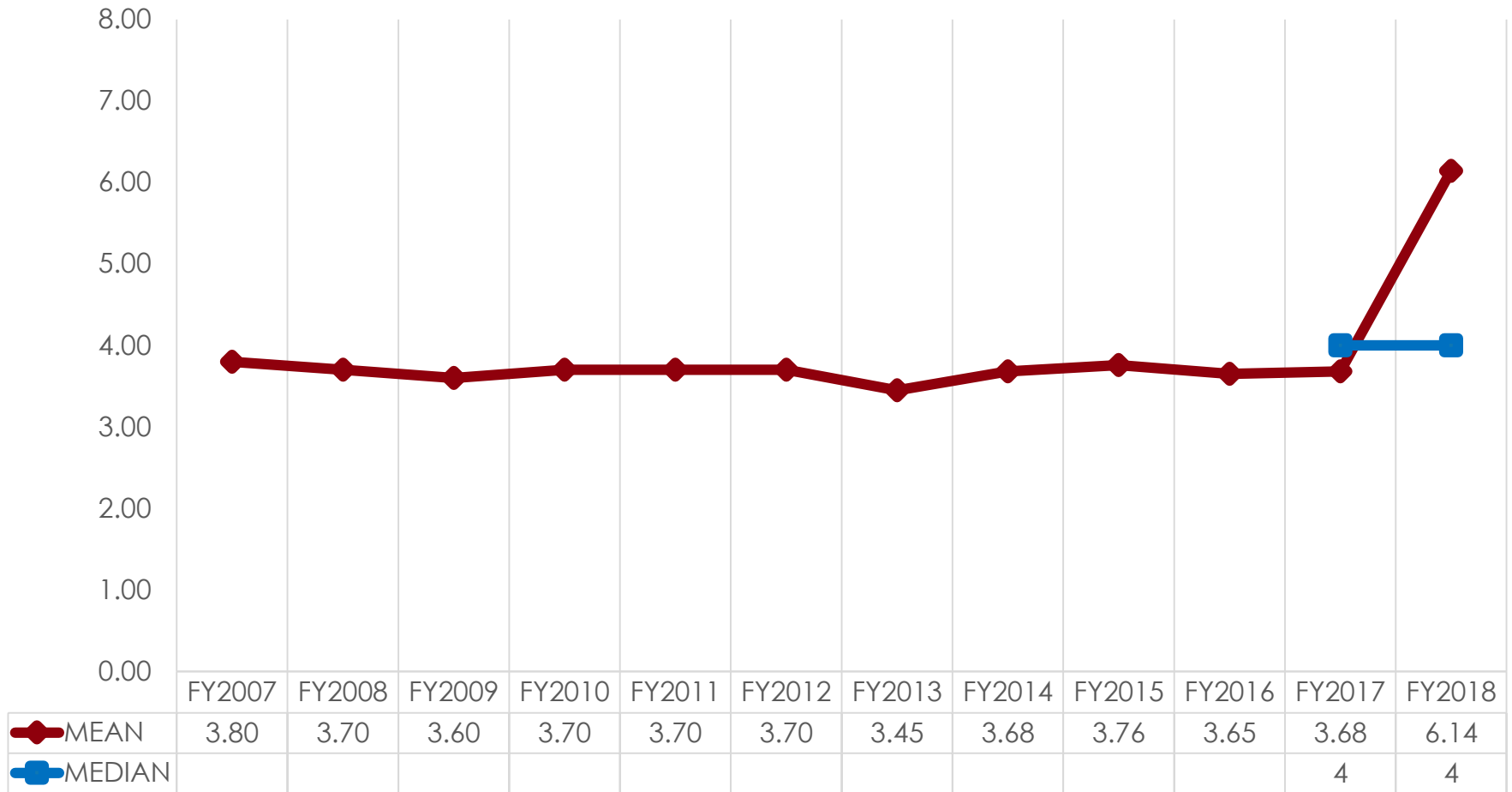
	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
1st Time	81%	80%	82%	80%	83%	85%	88%	85%	88%	86%	83%	63%
Repeat	19%	20%	18%	20%	17%	15%	12%	15%	12%	14%	17%	37%

Length of Stay

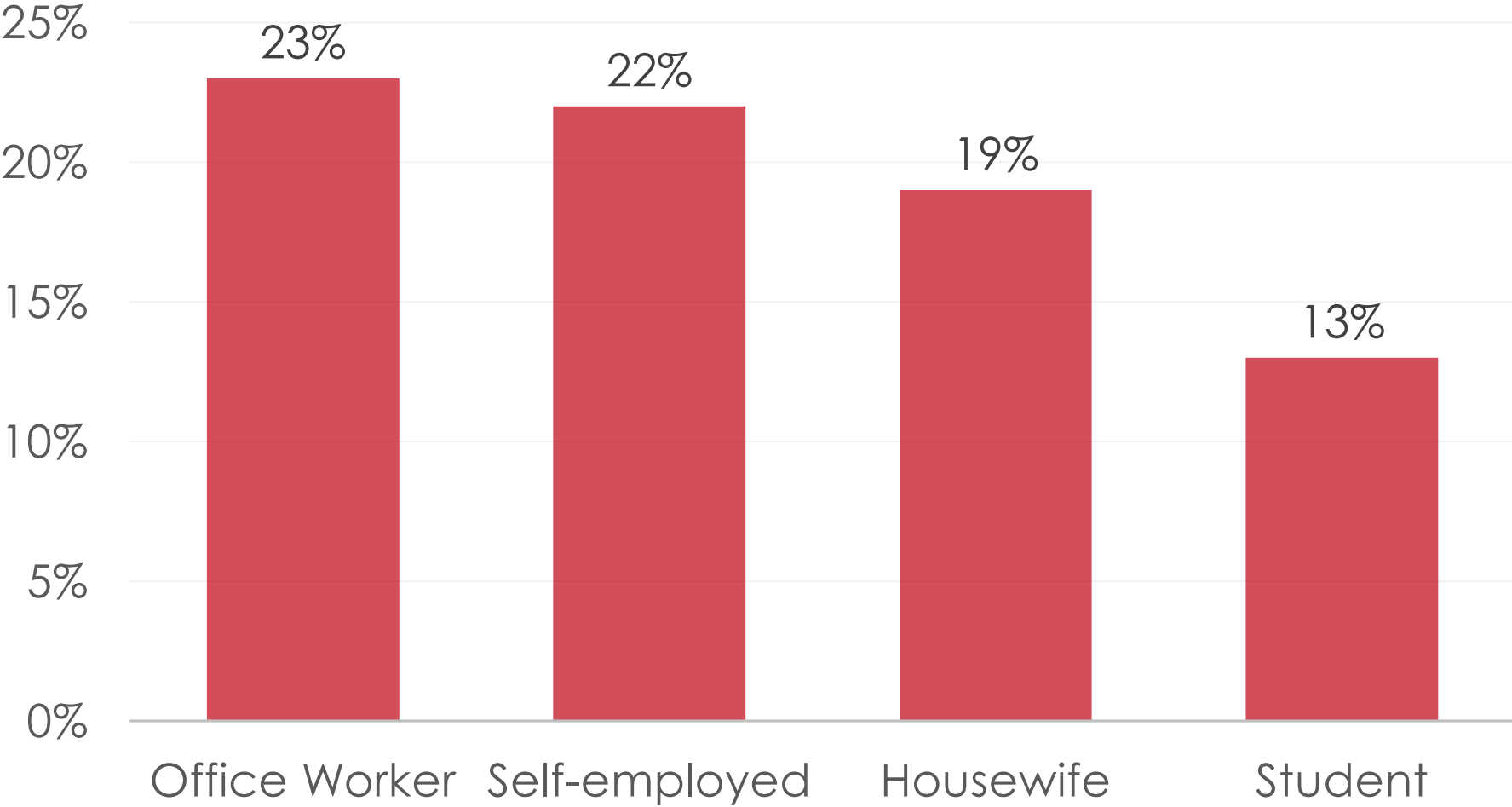
MEAN NUMBER OF NIGHTS = 6.14
MEDIAN NUMBER OF NIGHTS = 4



Length of Stay – Tracking



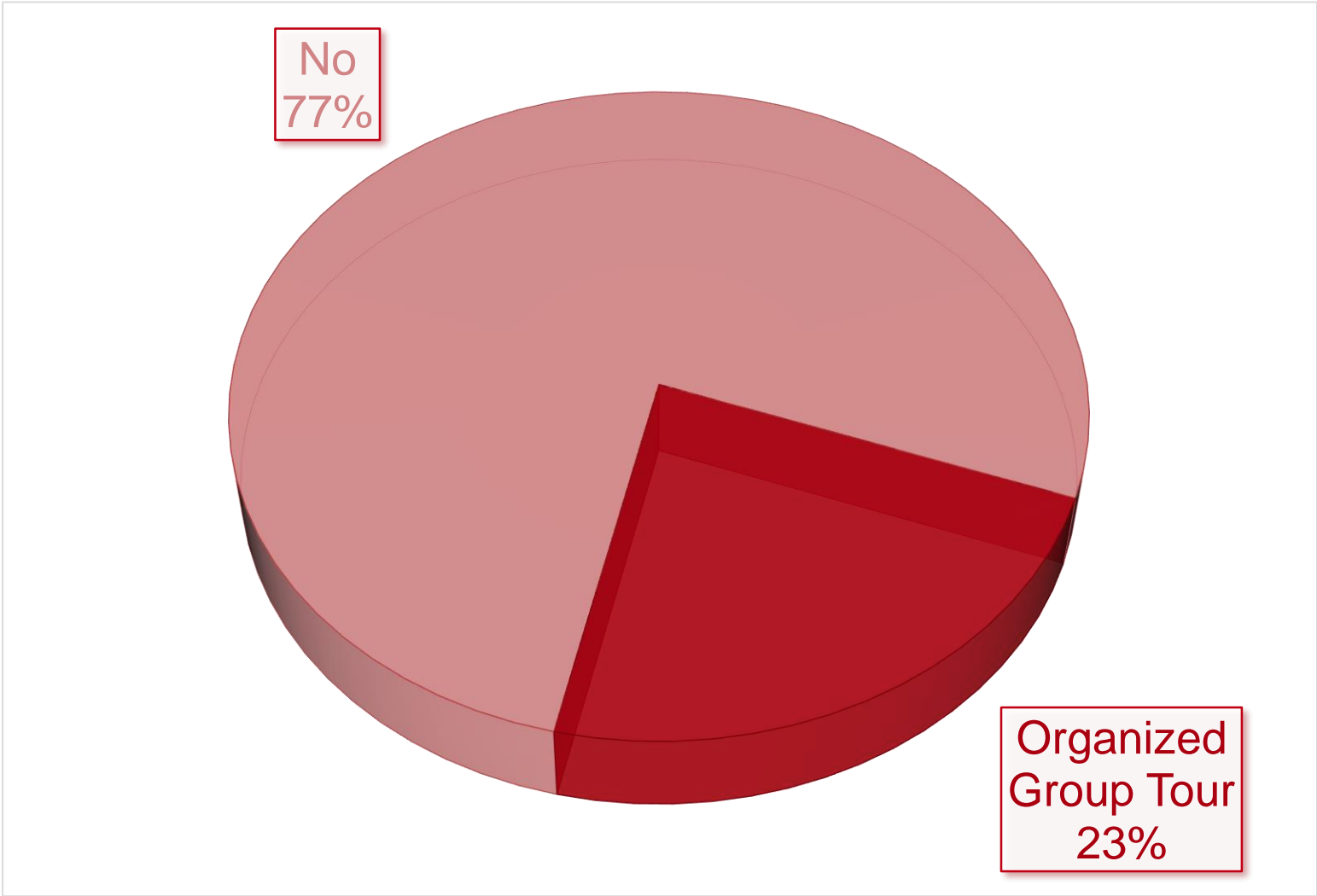
Occupation – Top Responses (10%+)



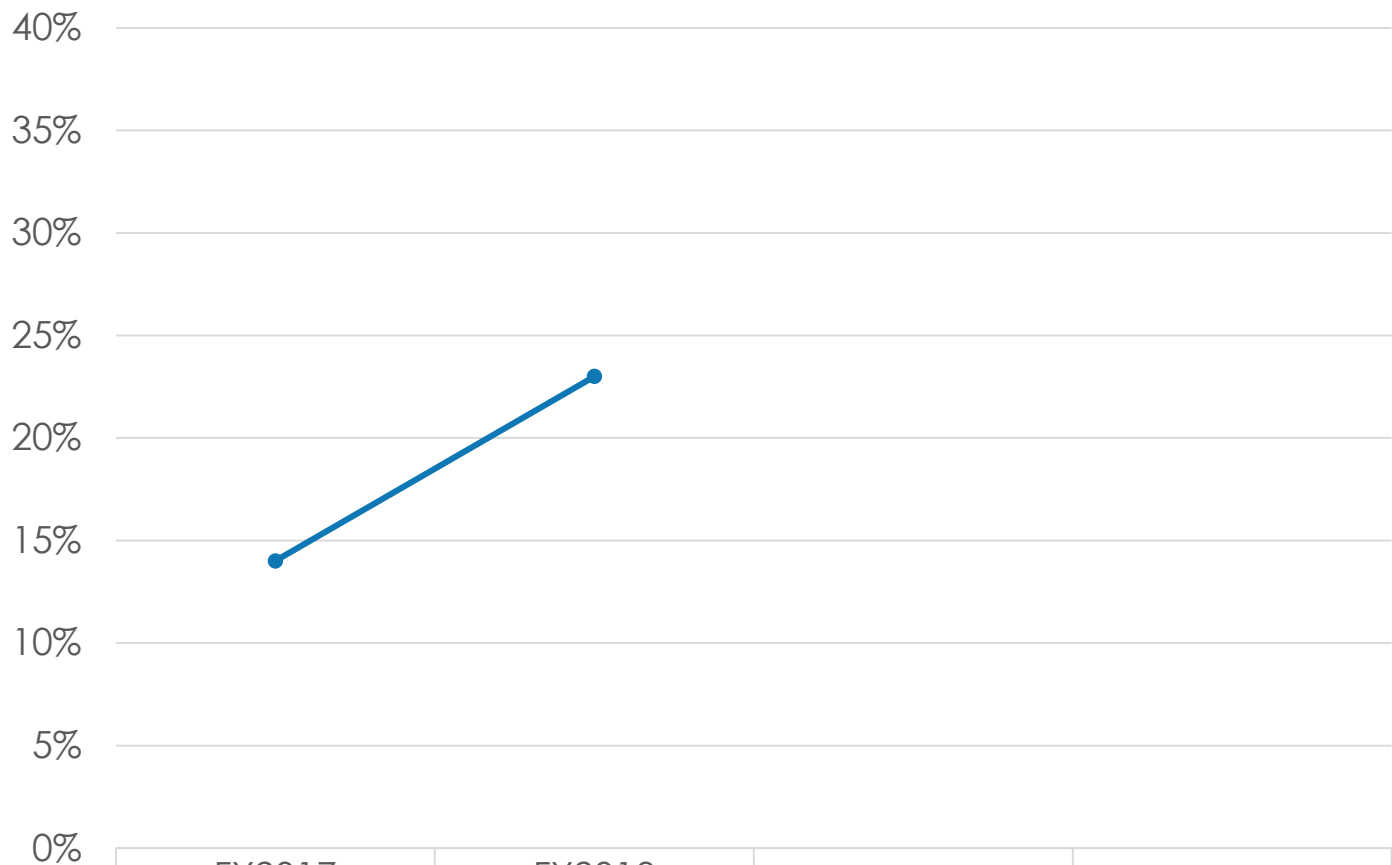
SECTION 2

TRAVEL PLANNING

Organized Group Tour

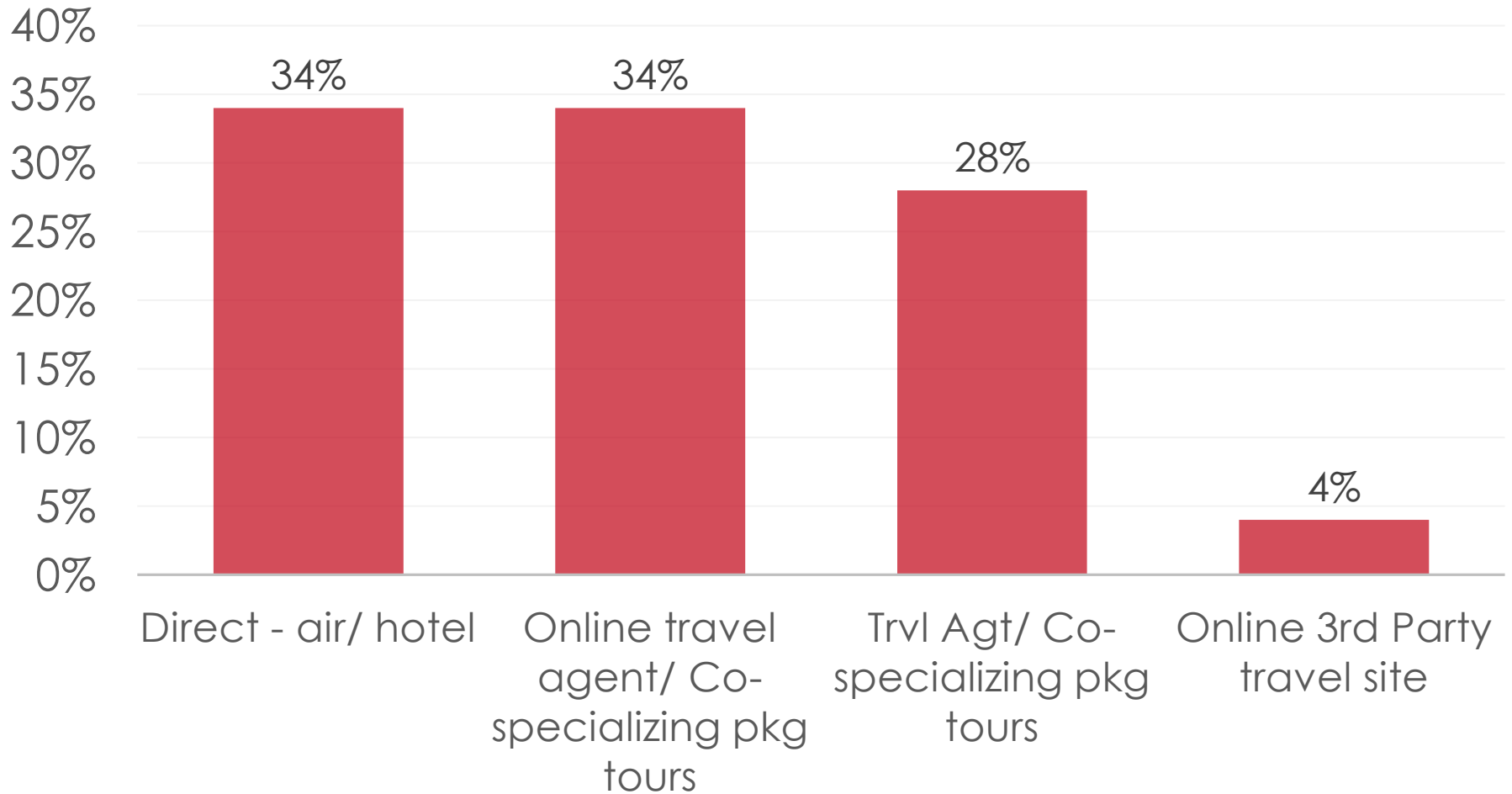


Organized Group Tour

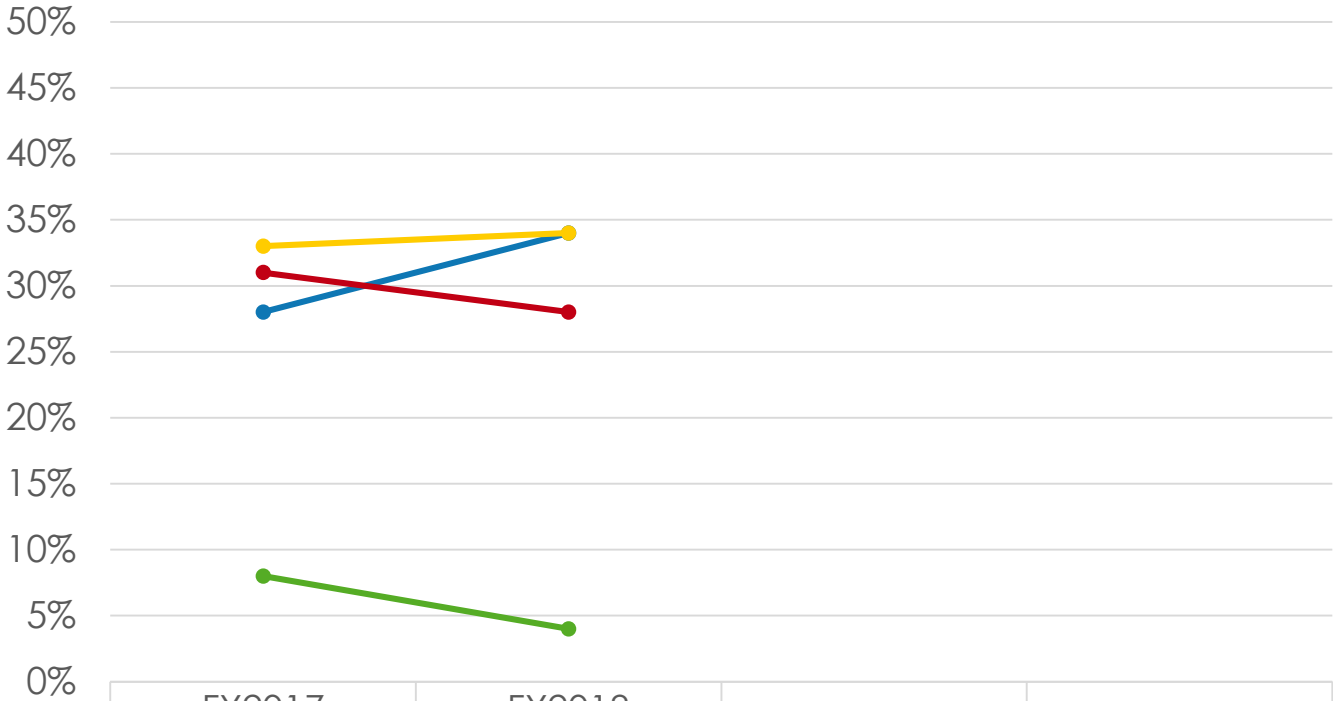


Organized Group Tour	14%	23%		
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Travel Arrangements

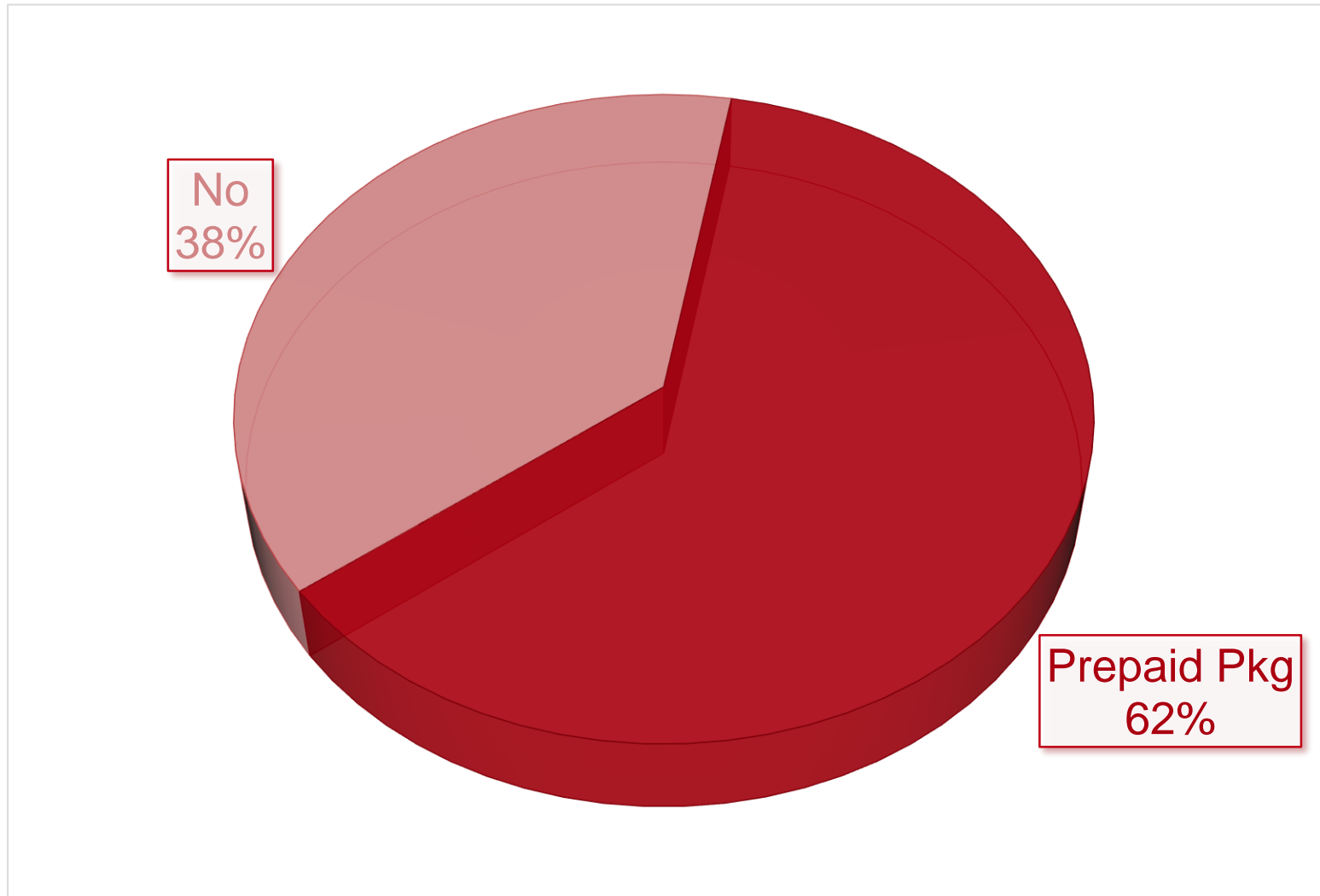


Travel Arrangements

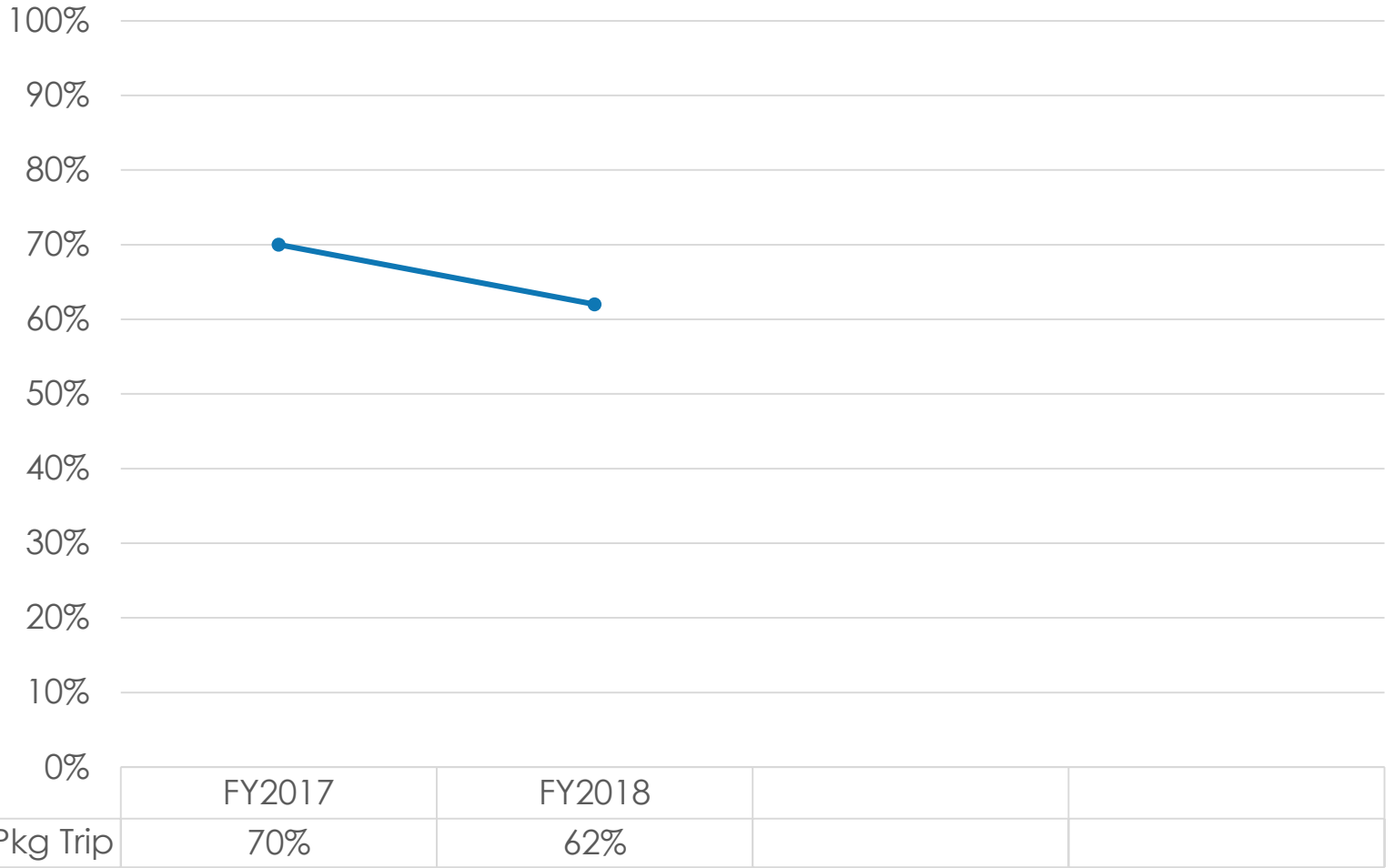


	FY2017	FY2018		
—●— Online travel agent	28%	34%		
—●— Trvl Agt/ Co- Pkg Tour	31%	28%		
—●— Online 3rd Party	8%	4%		
—●— Direct Air/ Hotel	33%	34%		

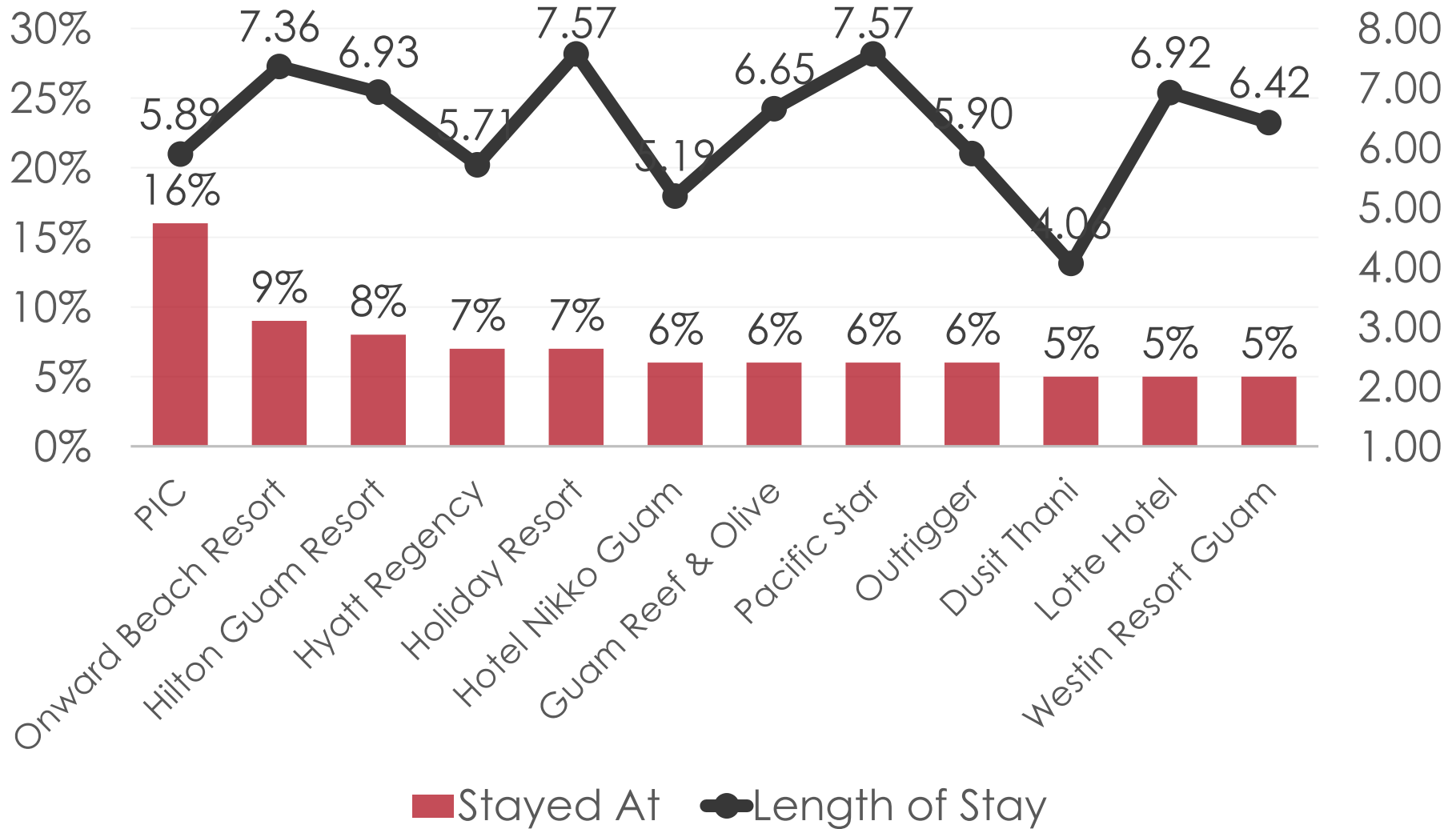
Prepaid Package Tour



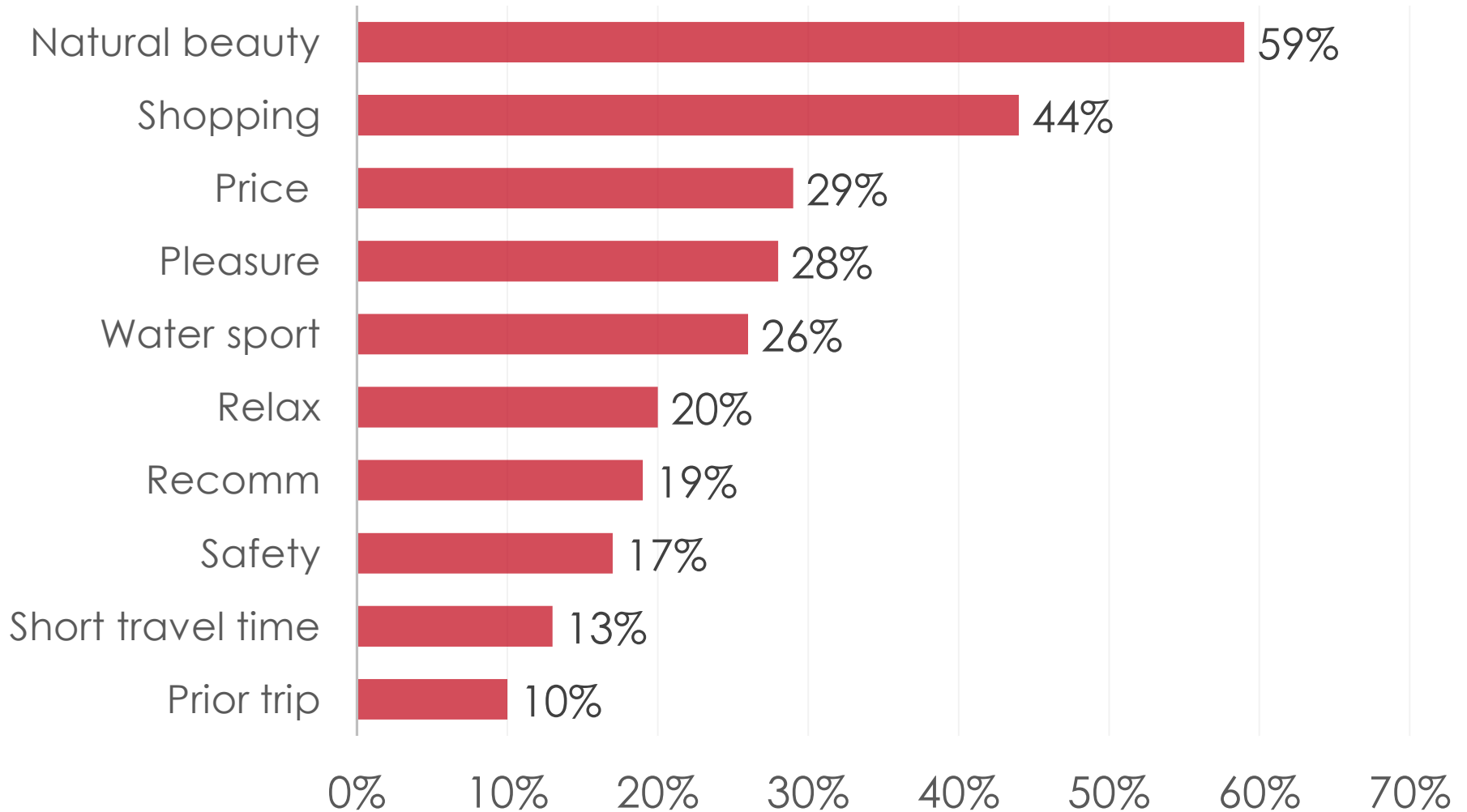
Prepaid Package Tour



Accommodations (Top Responses)



Travel Motivation (Top Responses)



Travel Motivation – Top 3

FY2017	FY2018
52% Natural beauty 46% Relax 38% Safety	59% Natural beauty 44% Shopping 29% Price

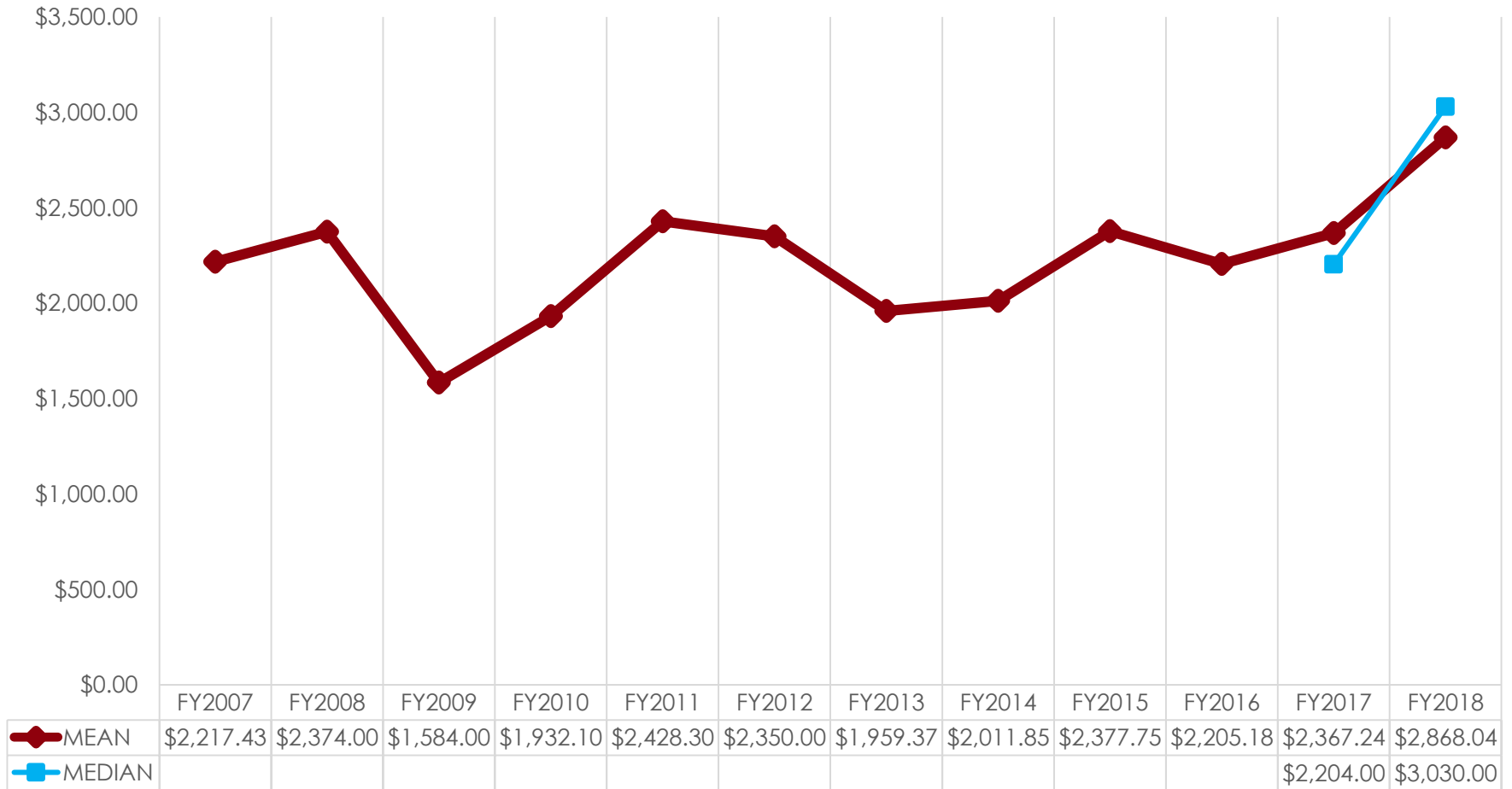
SECTION 3

EXPENDITURES

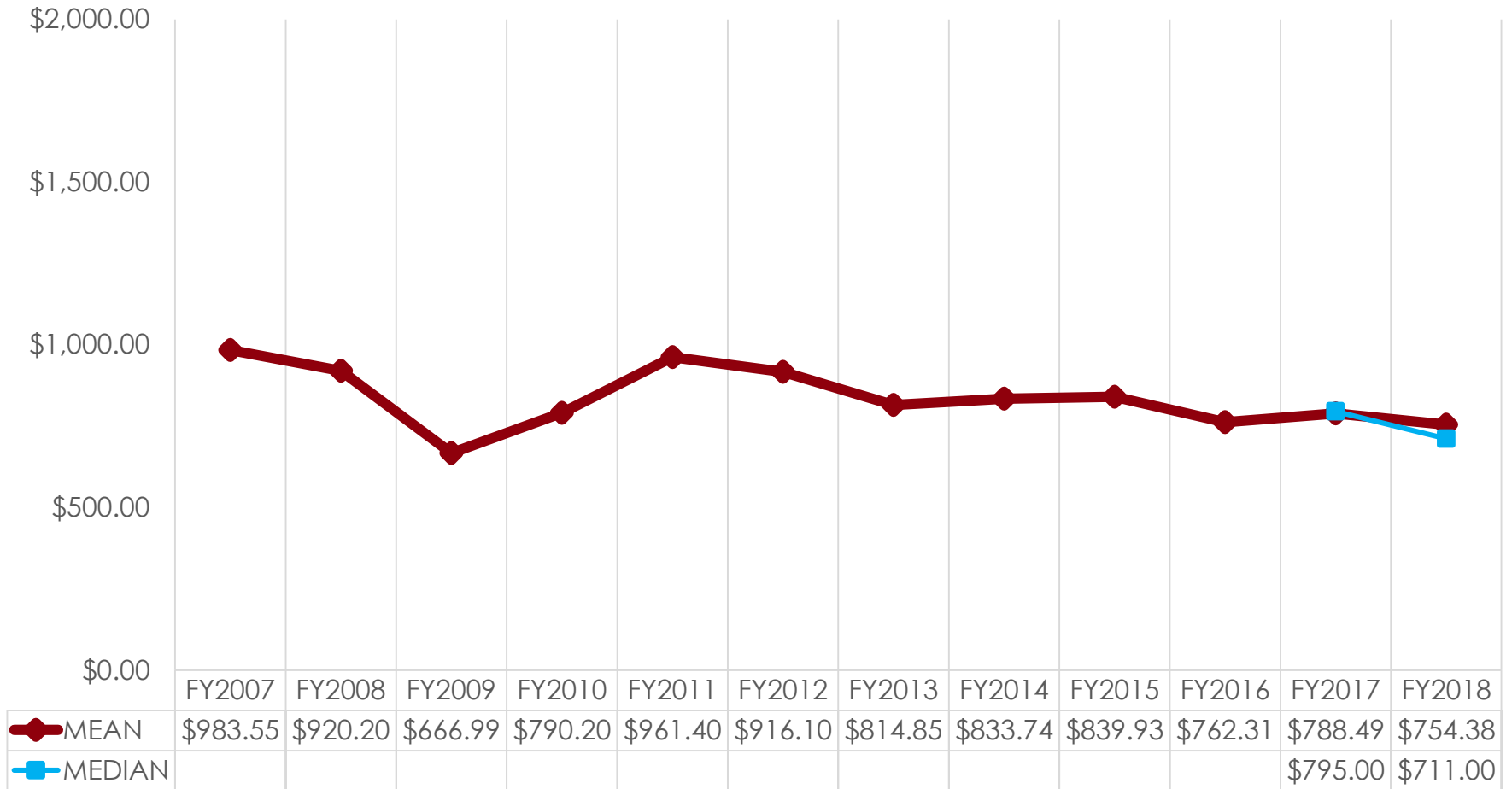
Prepaid Expenditures

- \$2,868.04 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$754.38 = overall mean average per person prepaid expenditures

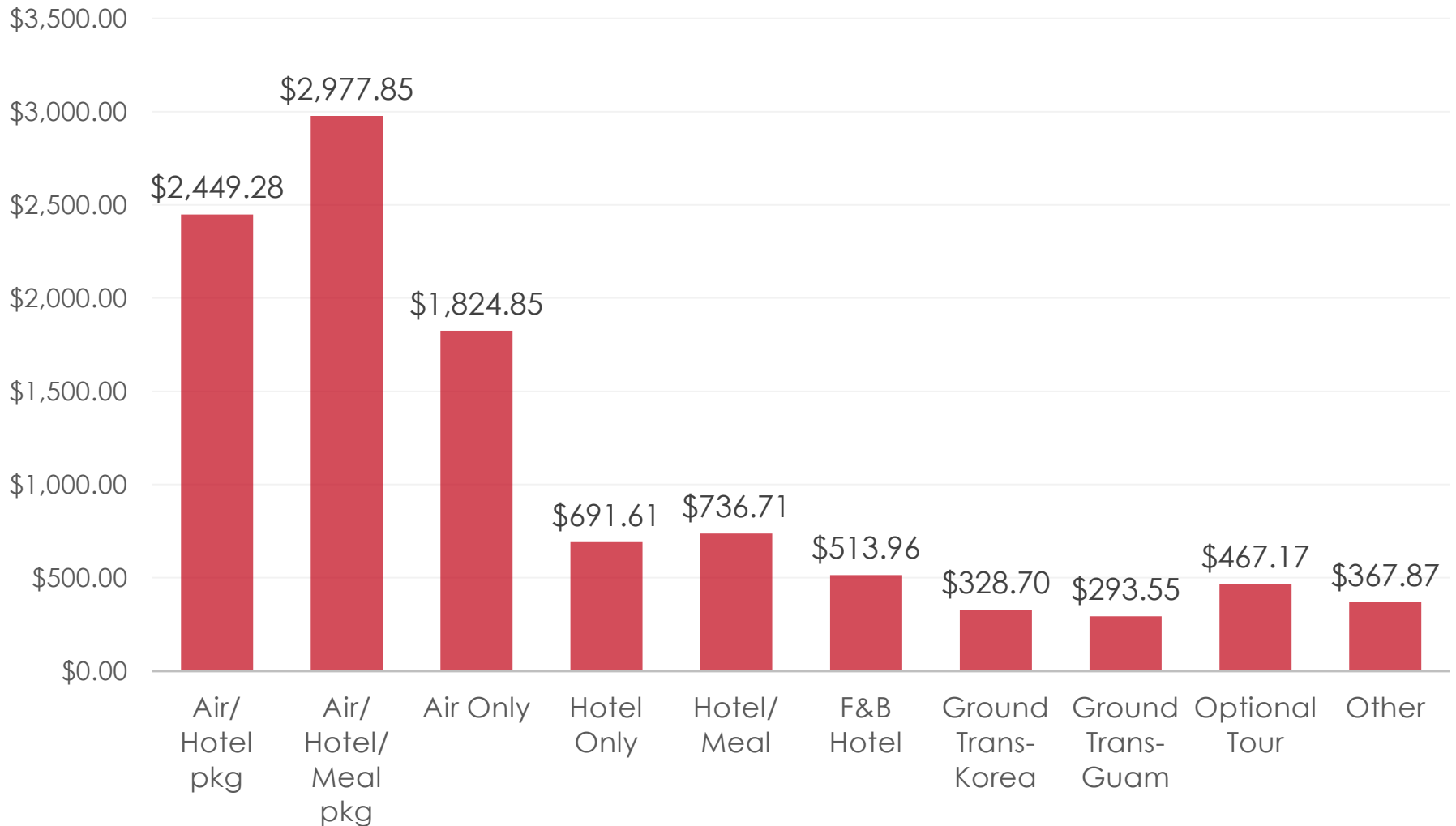
Prepaid Entire Travel Party – Tracking



Prepaid Per Person – Tracking

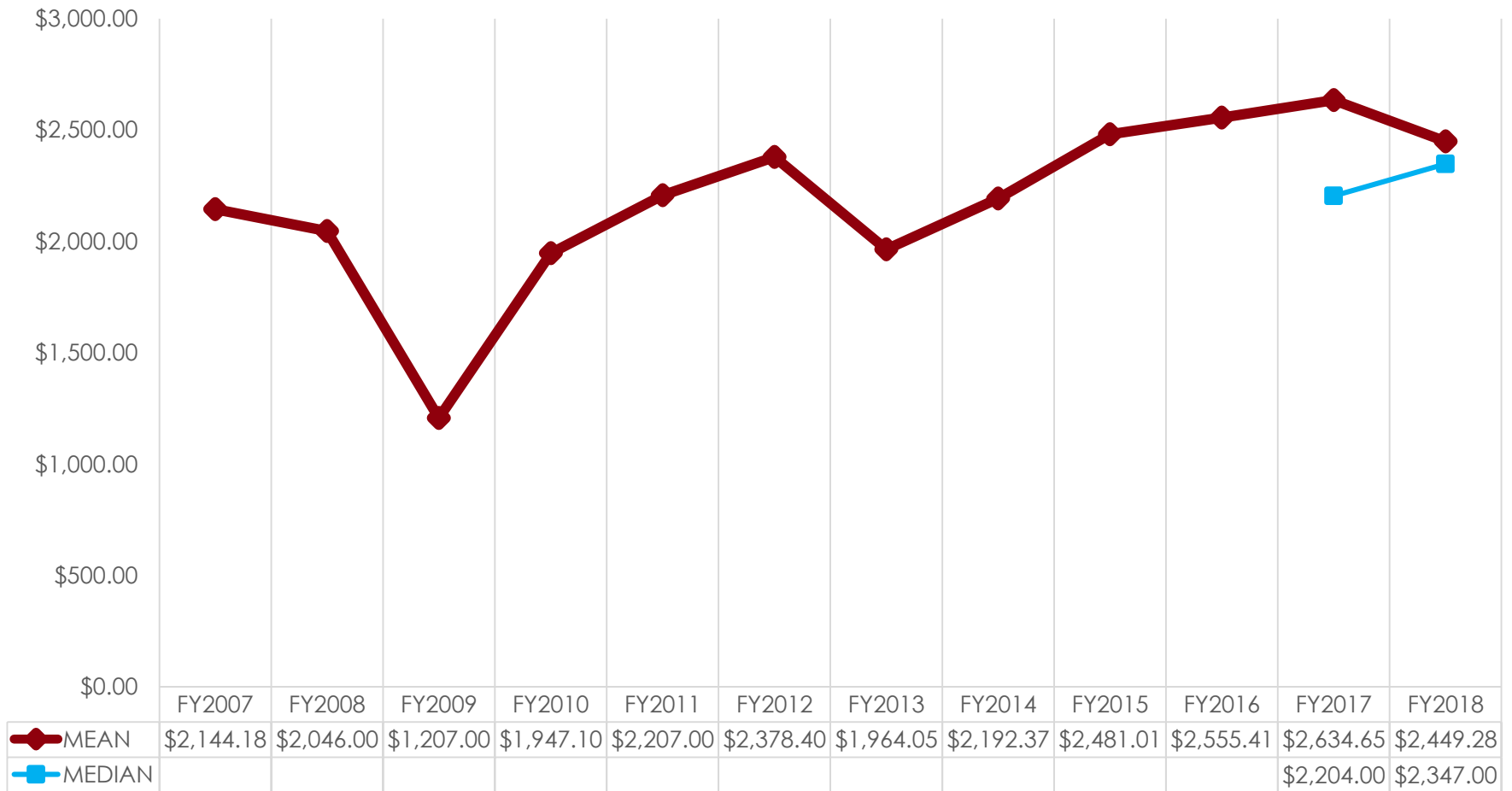


Prepaid Expenses by Category – Mean Entire Travel Party



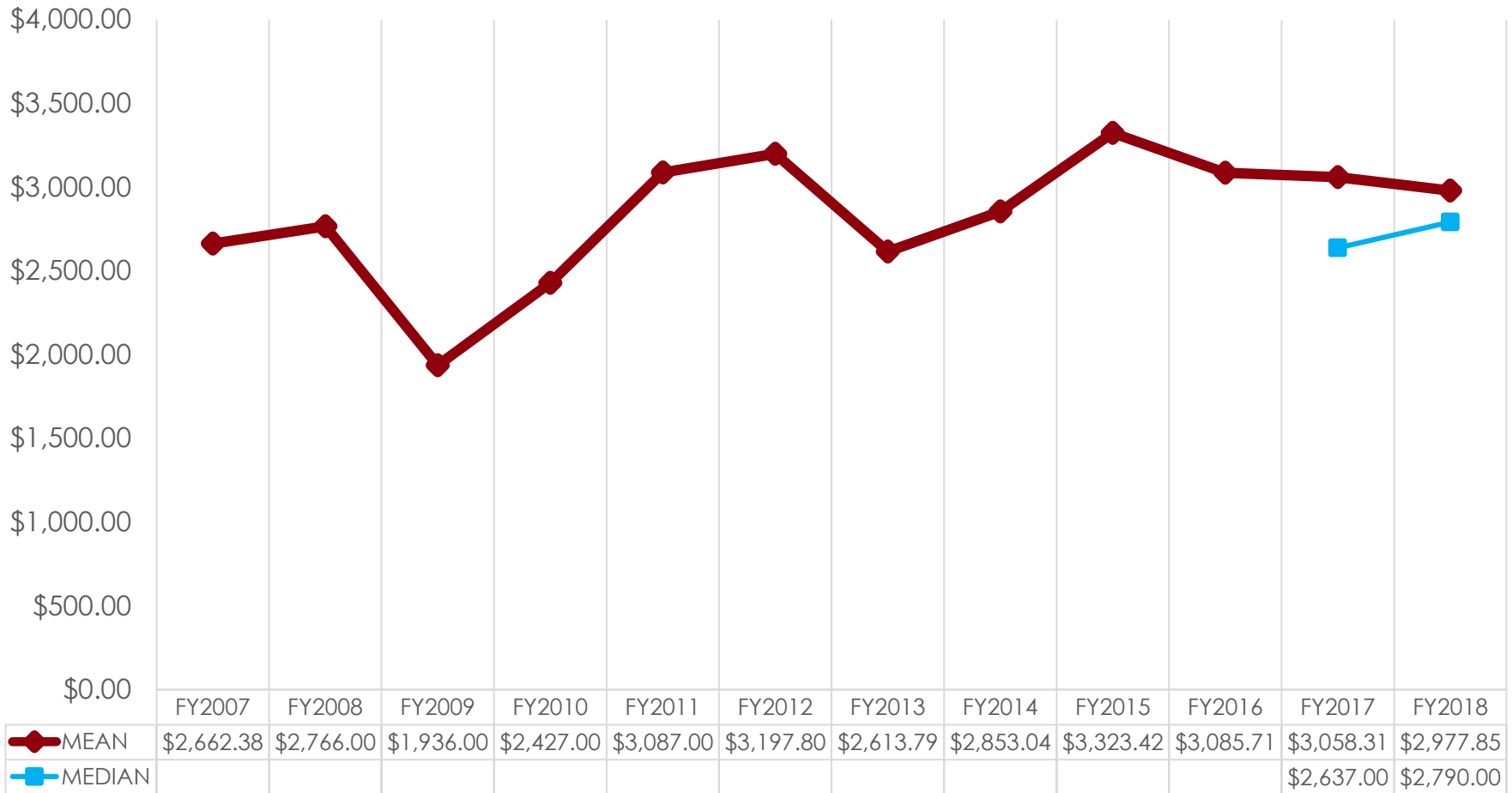
Prepaid – Tracking

Airfare & Accommodation Packages

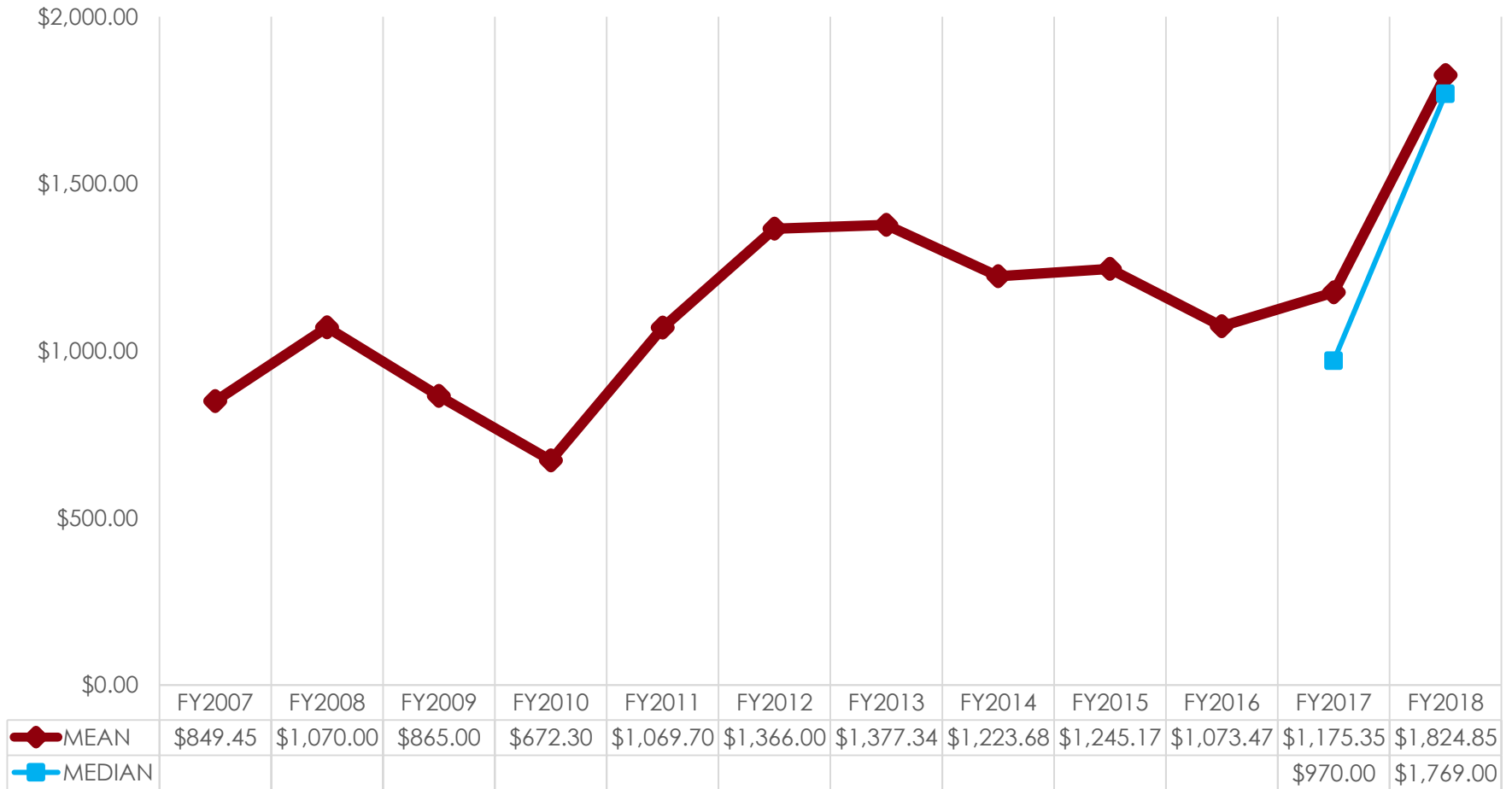


Prepaid – Tracking

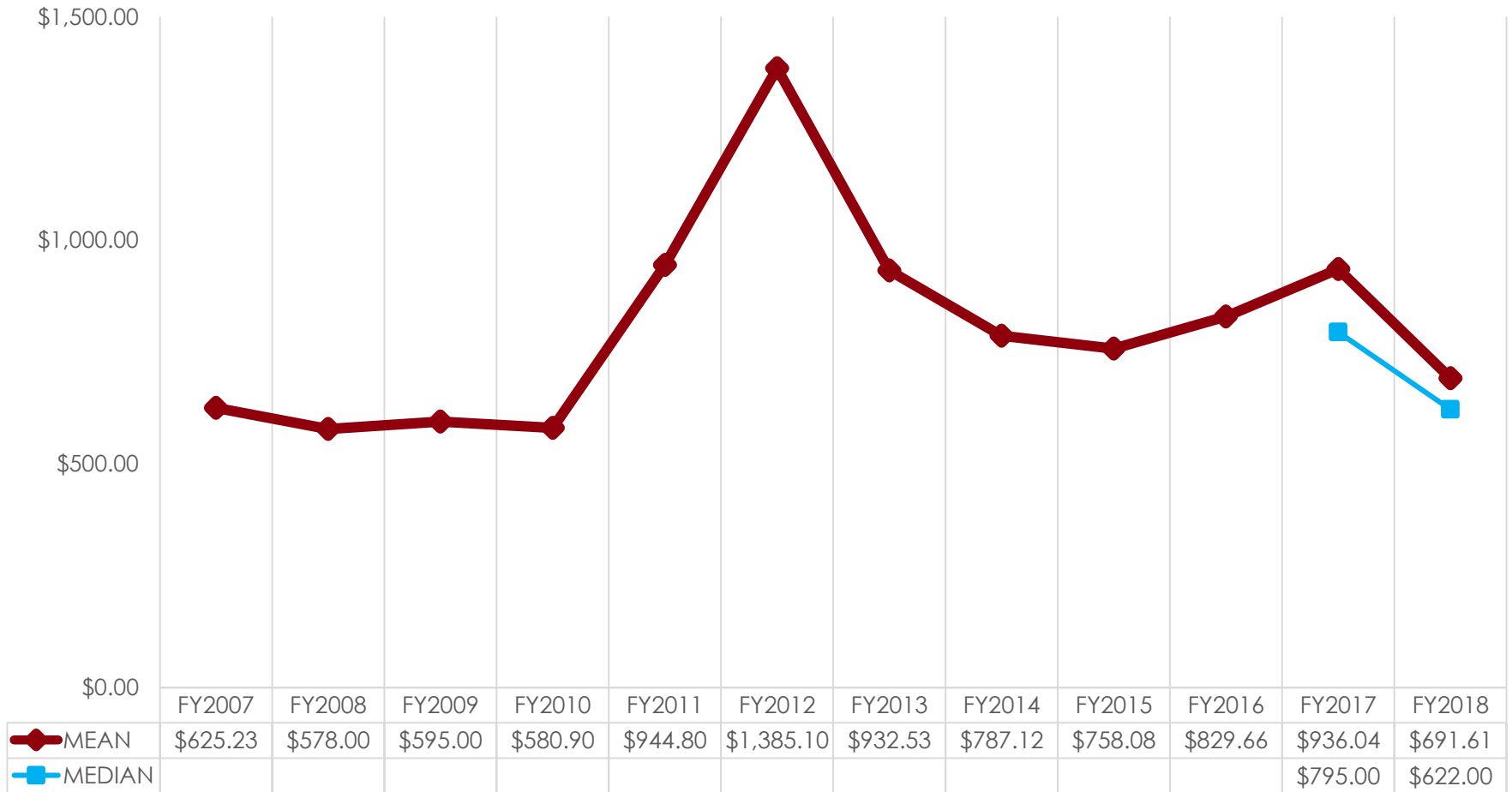
Airfare & Accommodation W/ Meal Packages



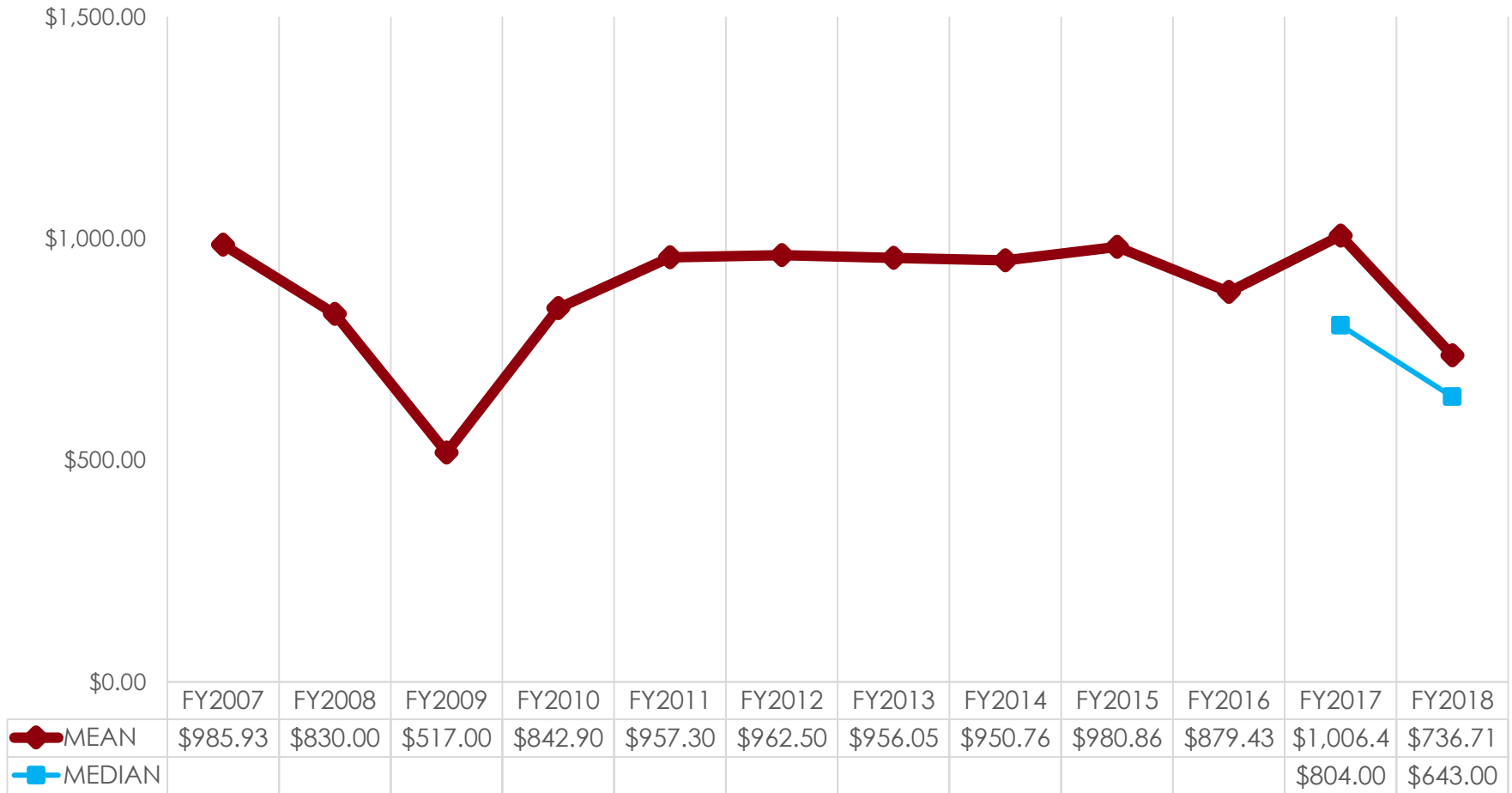
Prepaid – Tracking Airfare Only



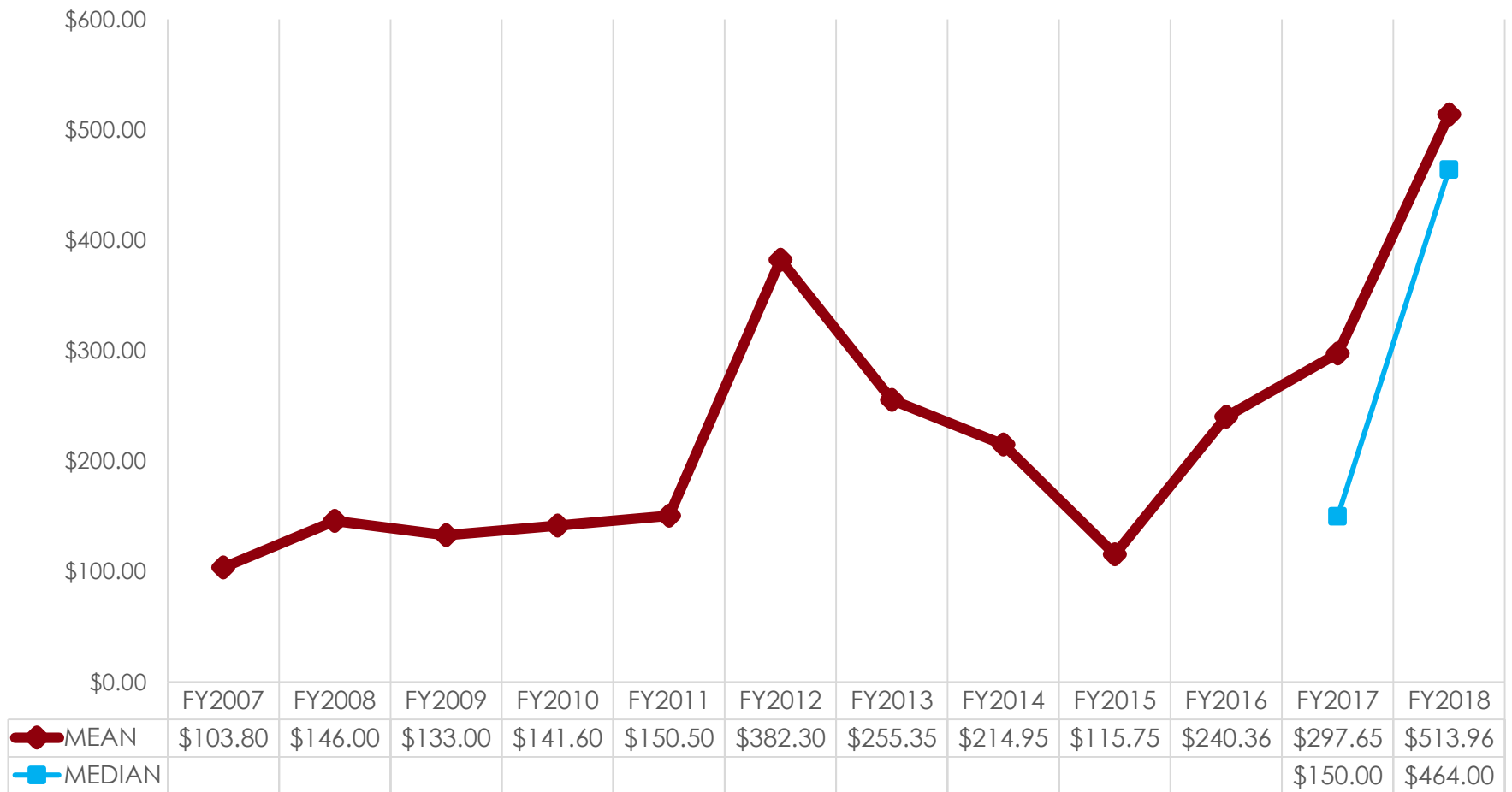
Prepaid – Tracking Accommodations Only



Prepaid – Tracking Accommodations w/ Meal Only

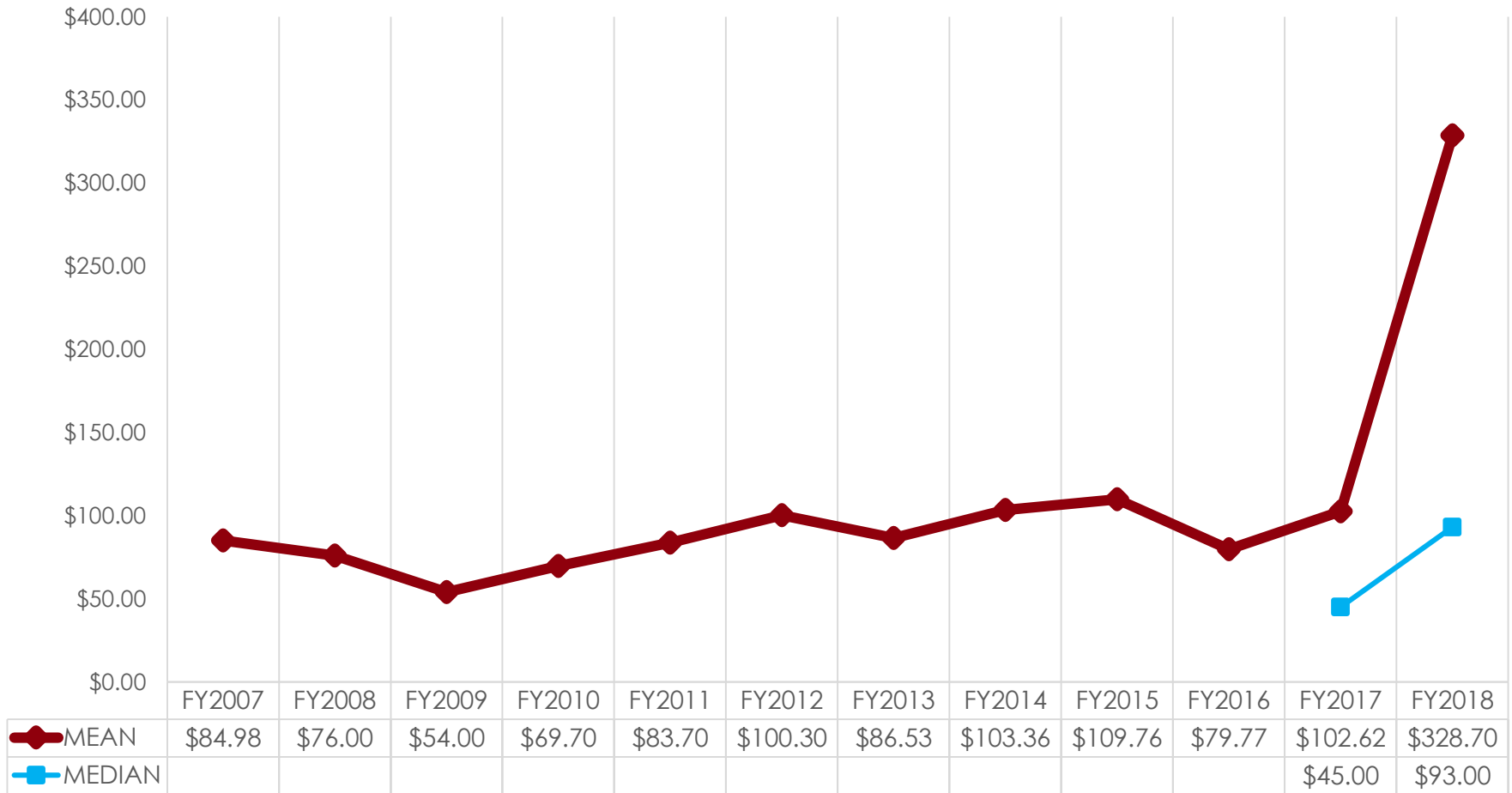


Prepaid – Tracking Food & Beverage in Hotel



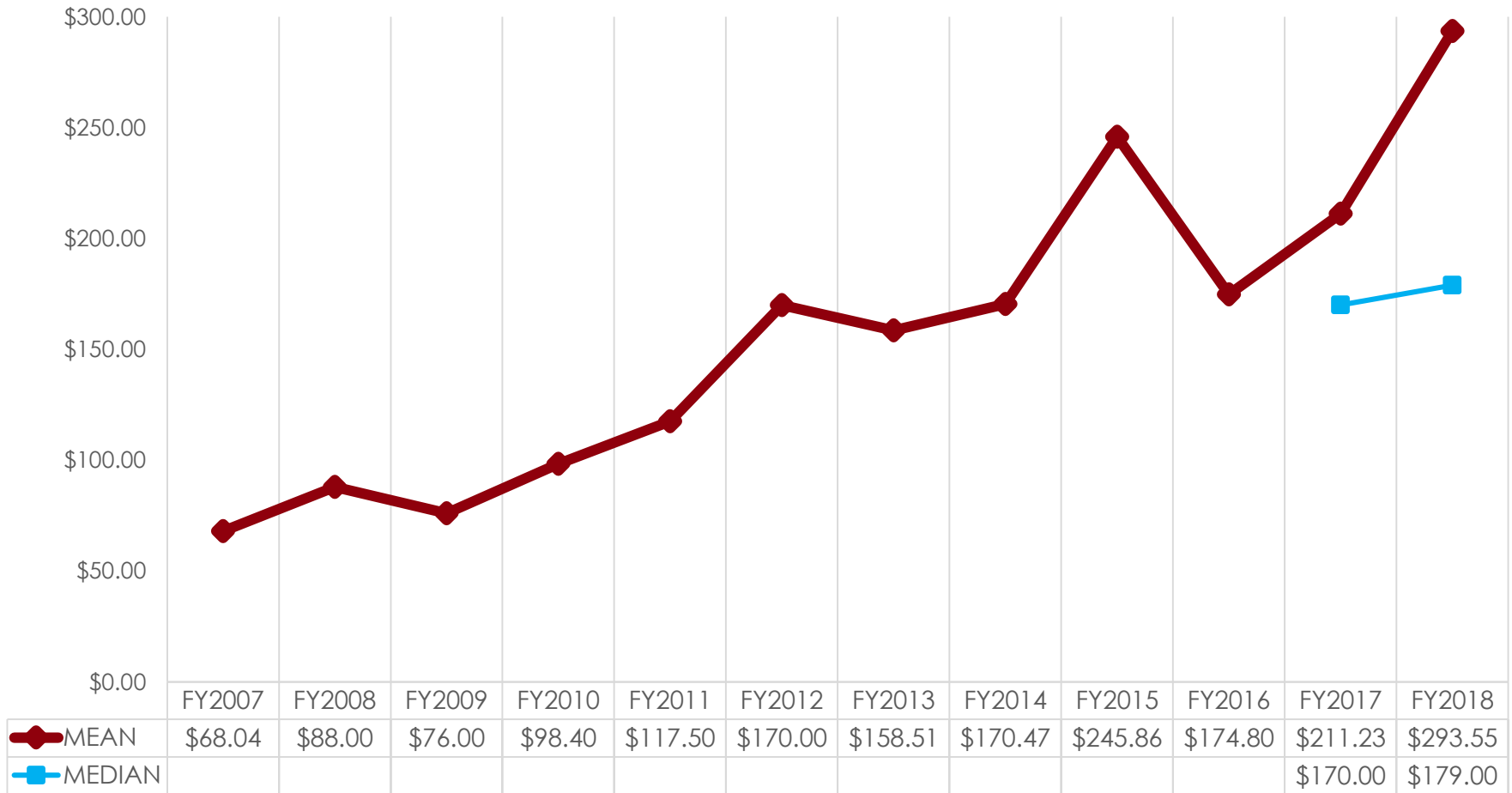
Prepaid – Tracking

Ground Transportation - Korea



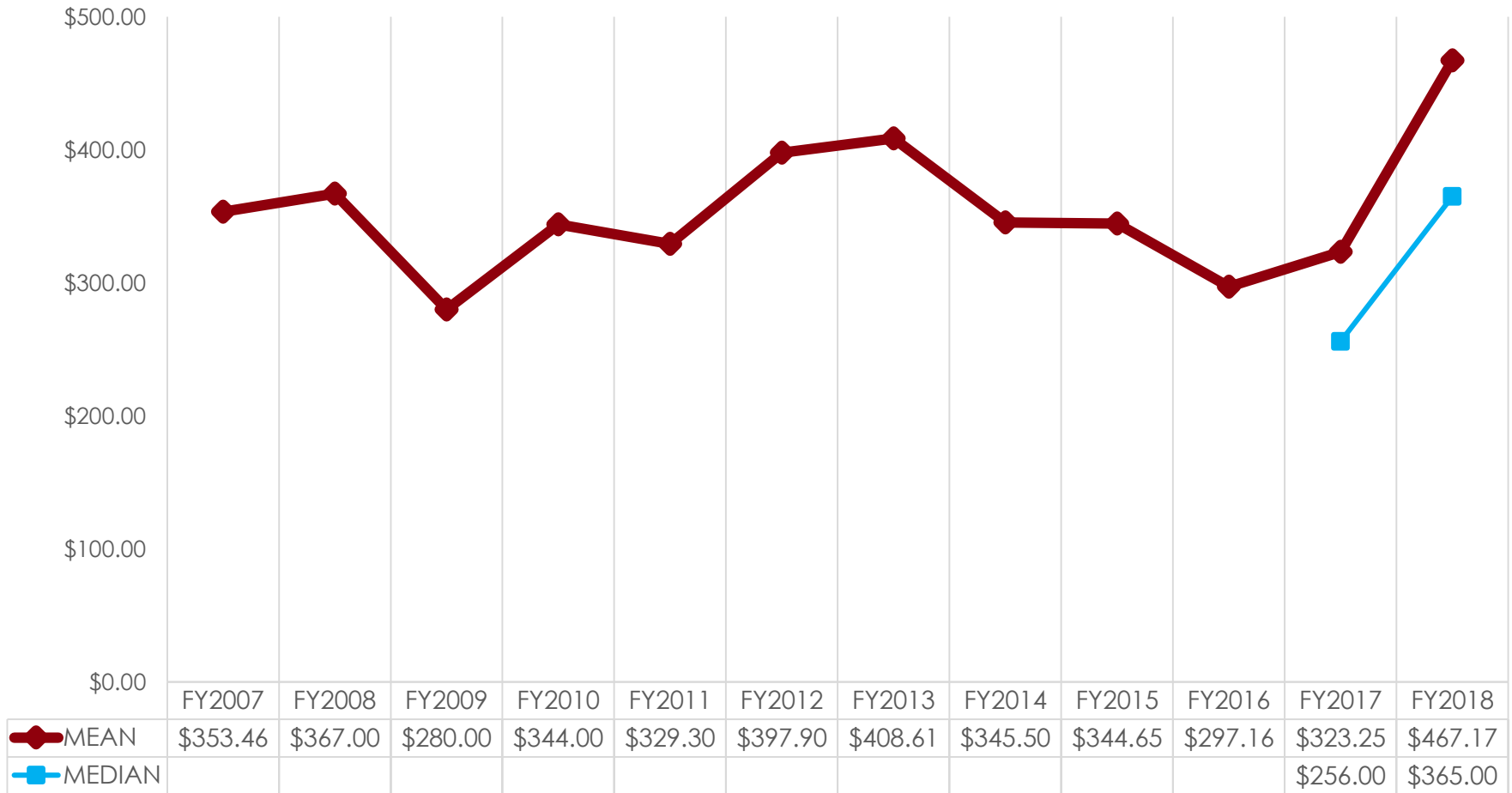
Prepaid – Tracking

Ground Transportation - Guam



Prepaid – Tracking

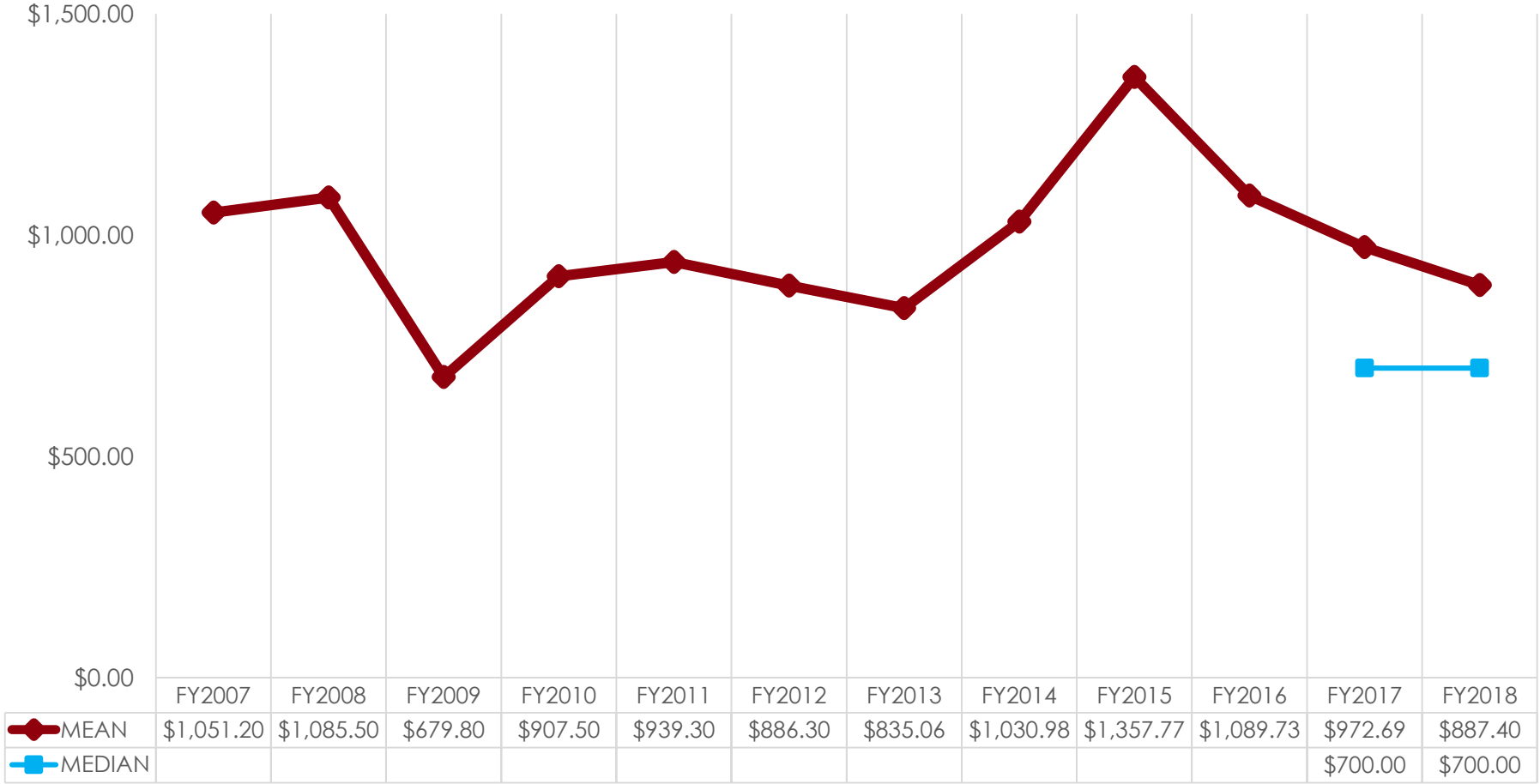
Optional tours/ Activities



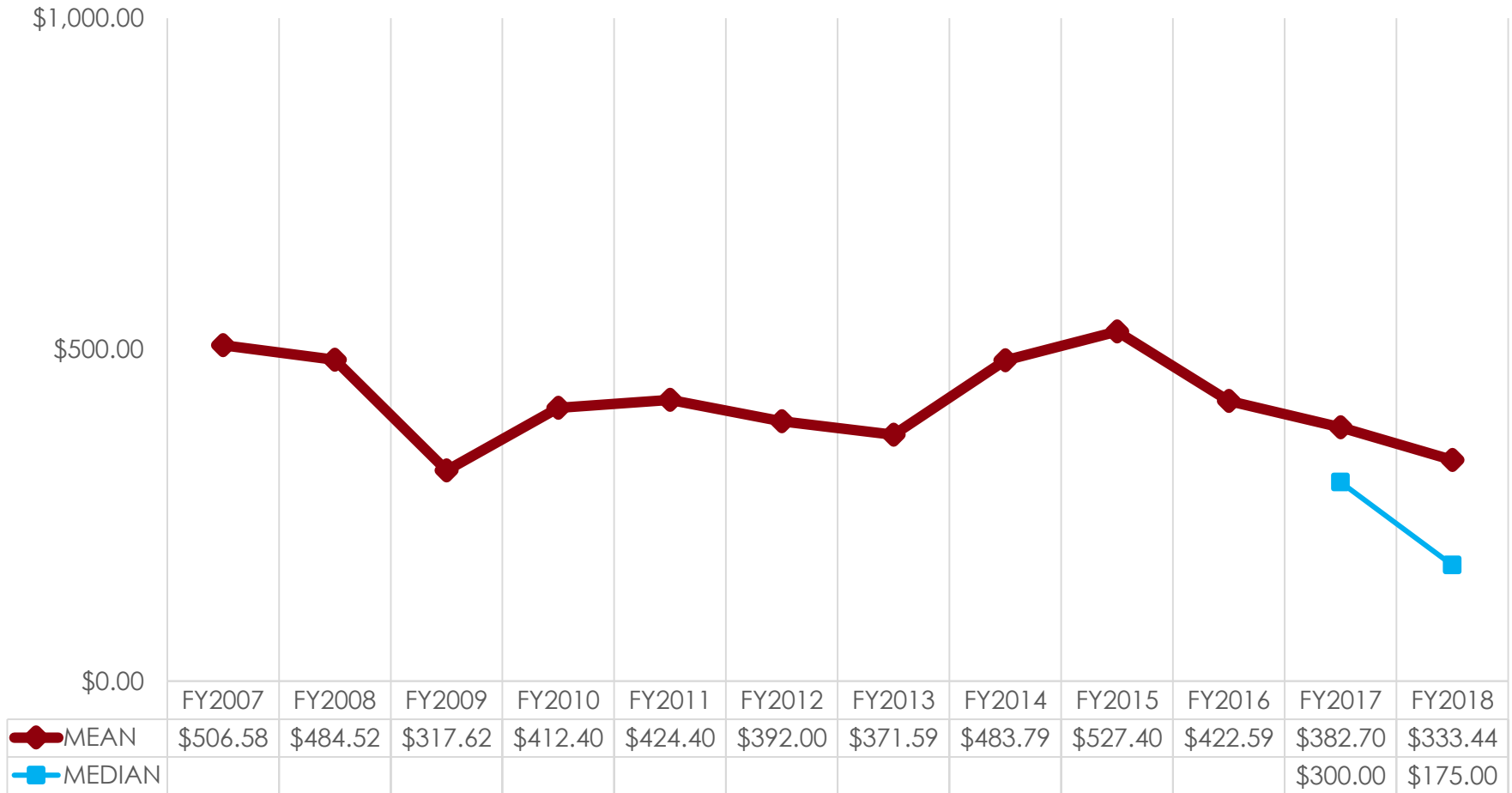
On-Island Expenditures

- \$887.40 = overall mean average on-island expense (for entire travel party size) by respondent
- \$333.44 = overall mean average per person prepaid expenditures

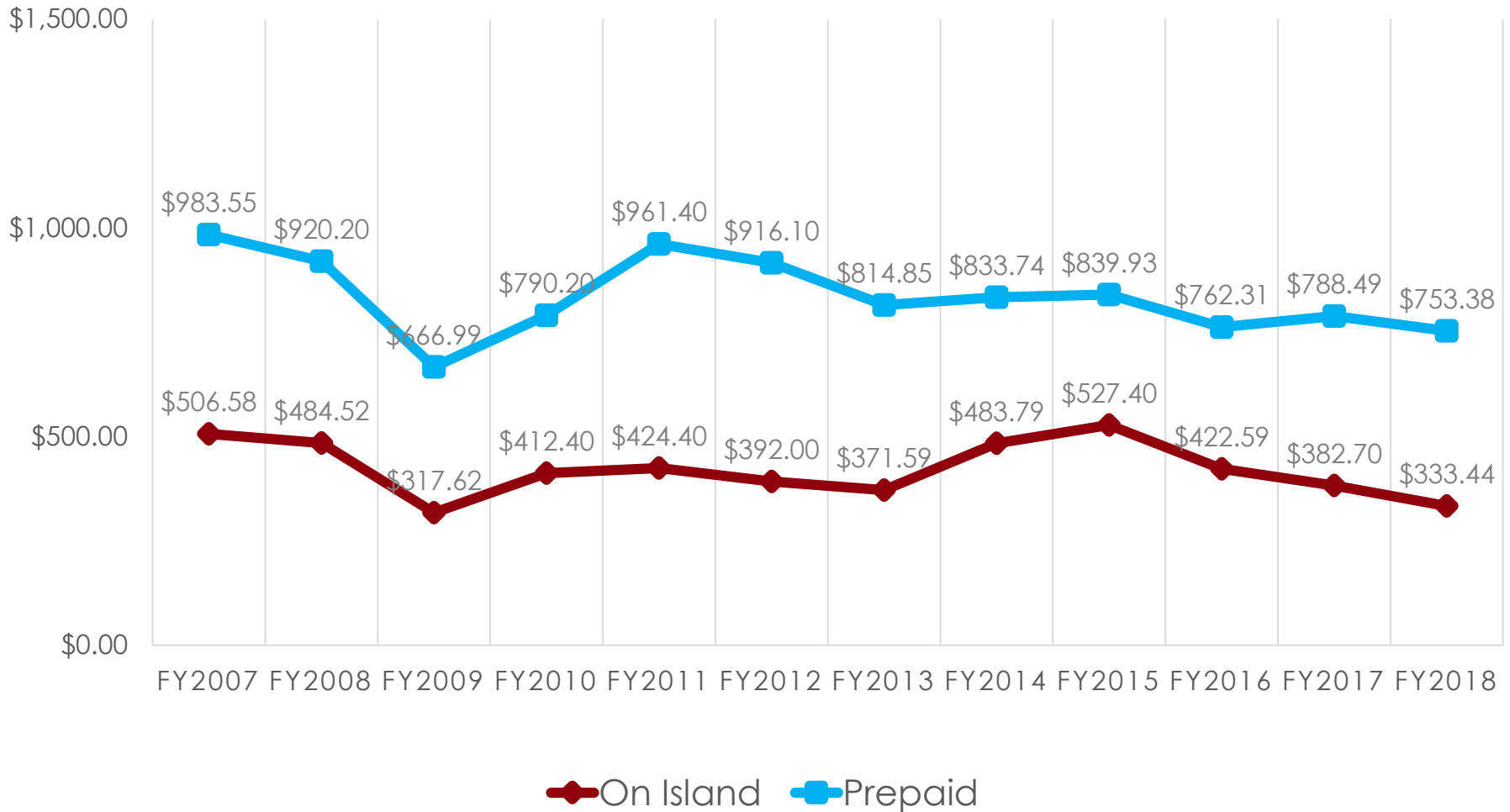
On-Island Entire Travel Party – Tracking



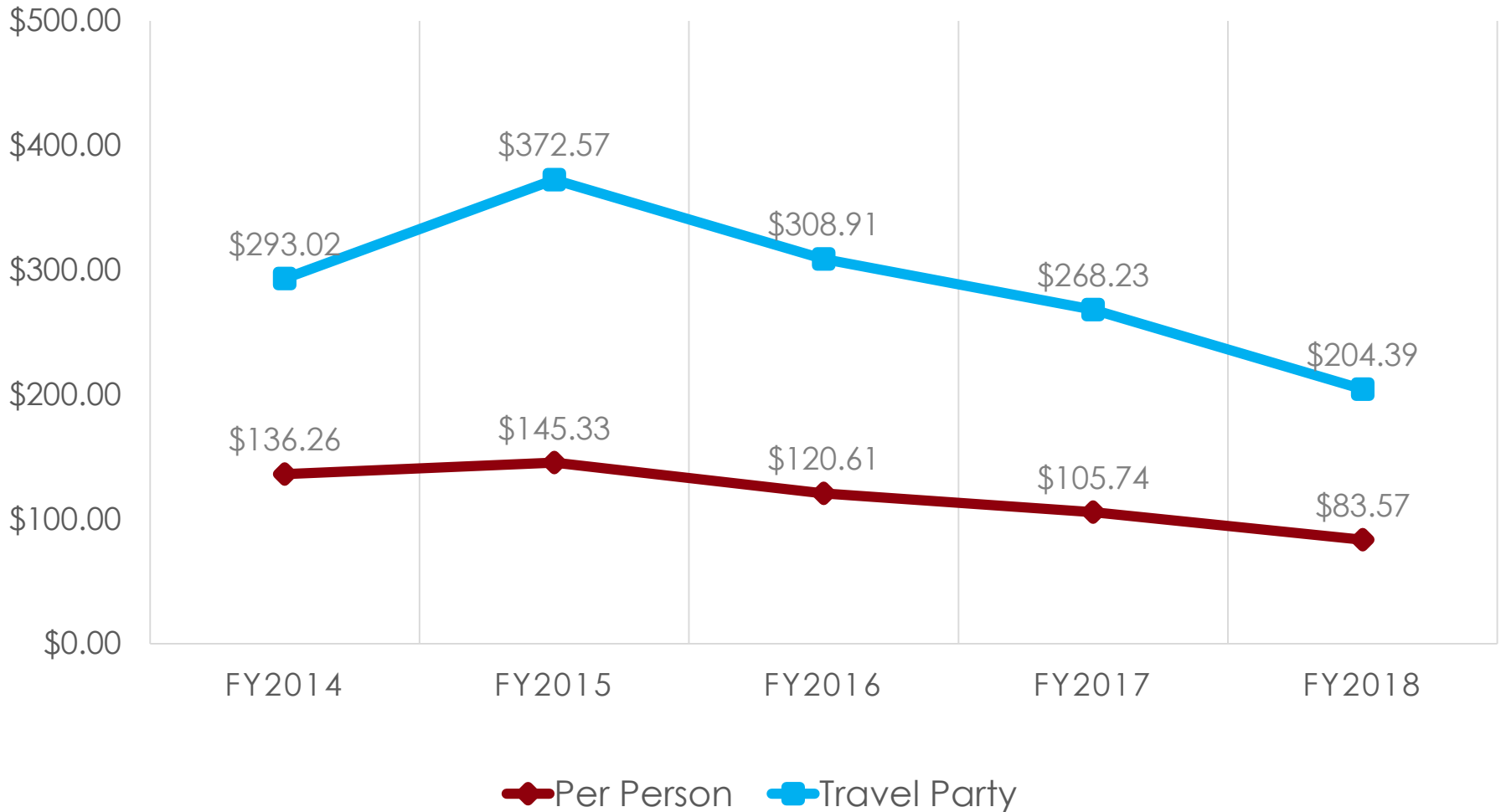
On-Island Per Person – Tracking



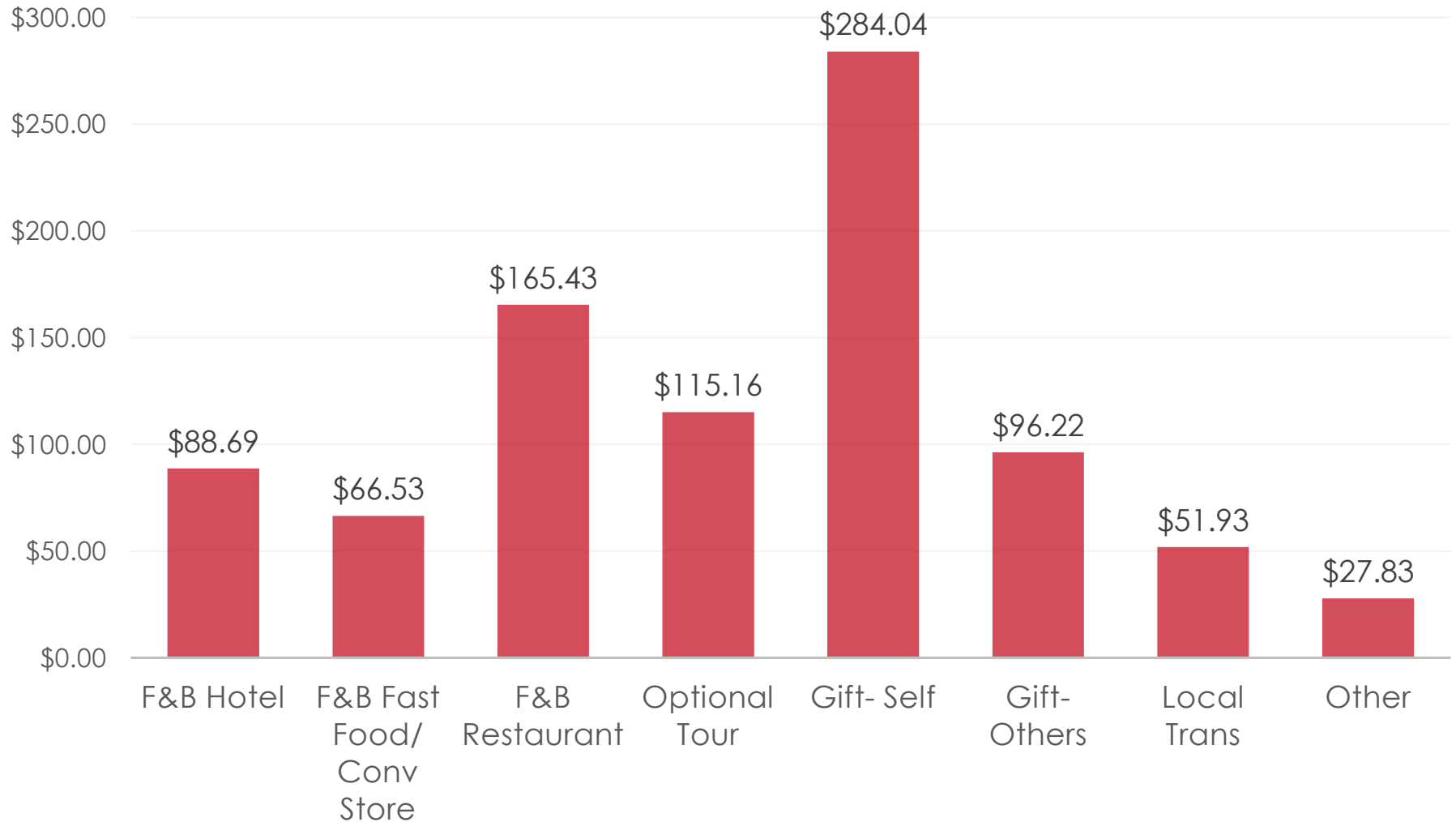
Per Person MEAN expenditures – Tracking On-Island/ Prepaid



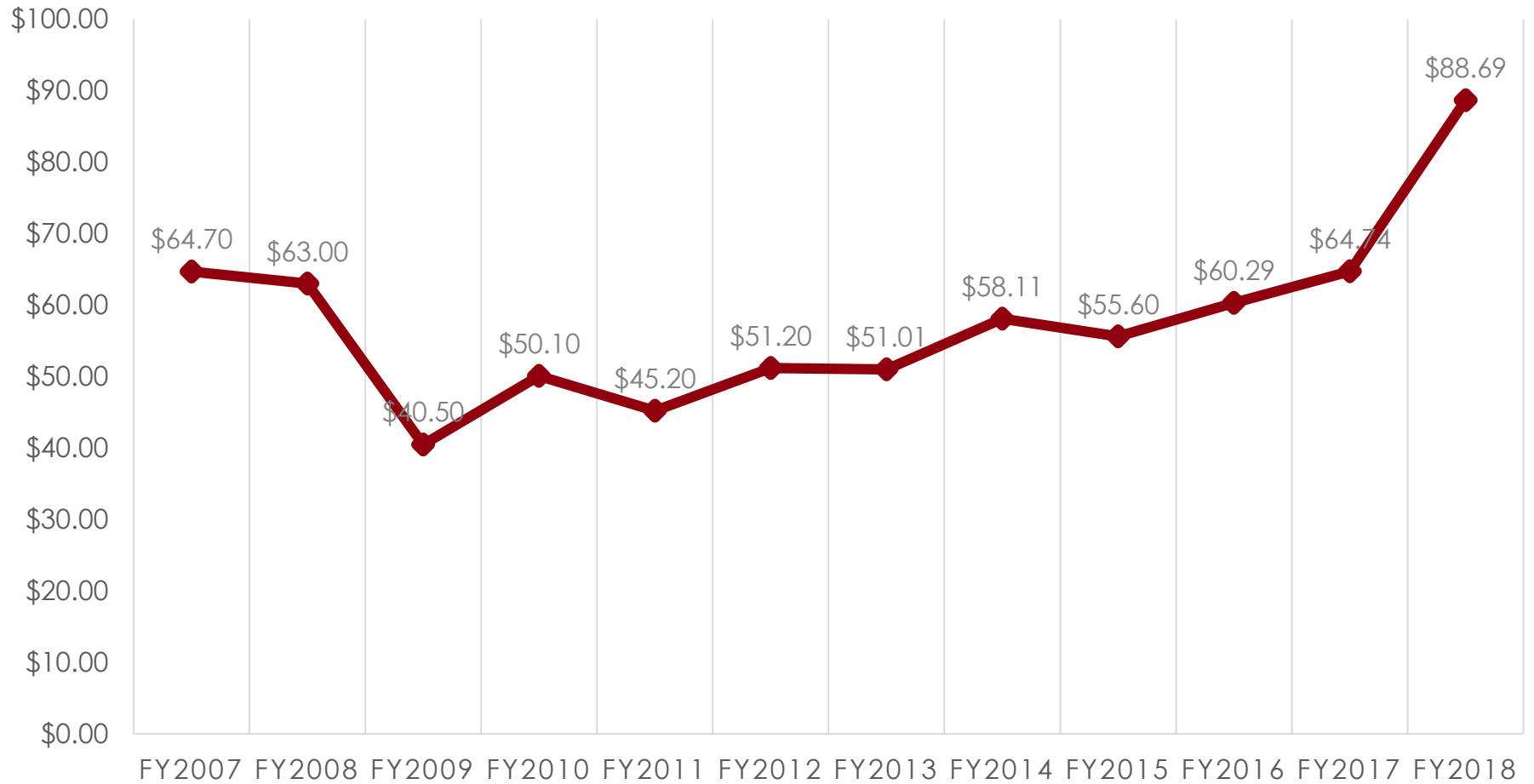
On-Island Per Day Spending – Tracking Mean



On-Island Expenses by Category – Mean Entire Travel Party

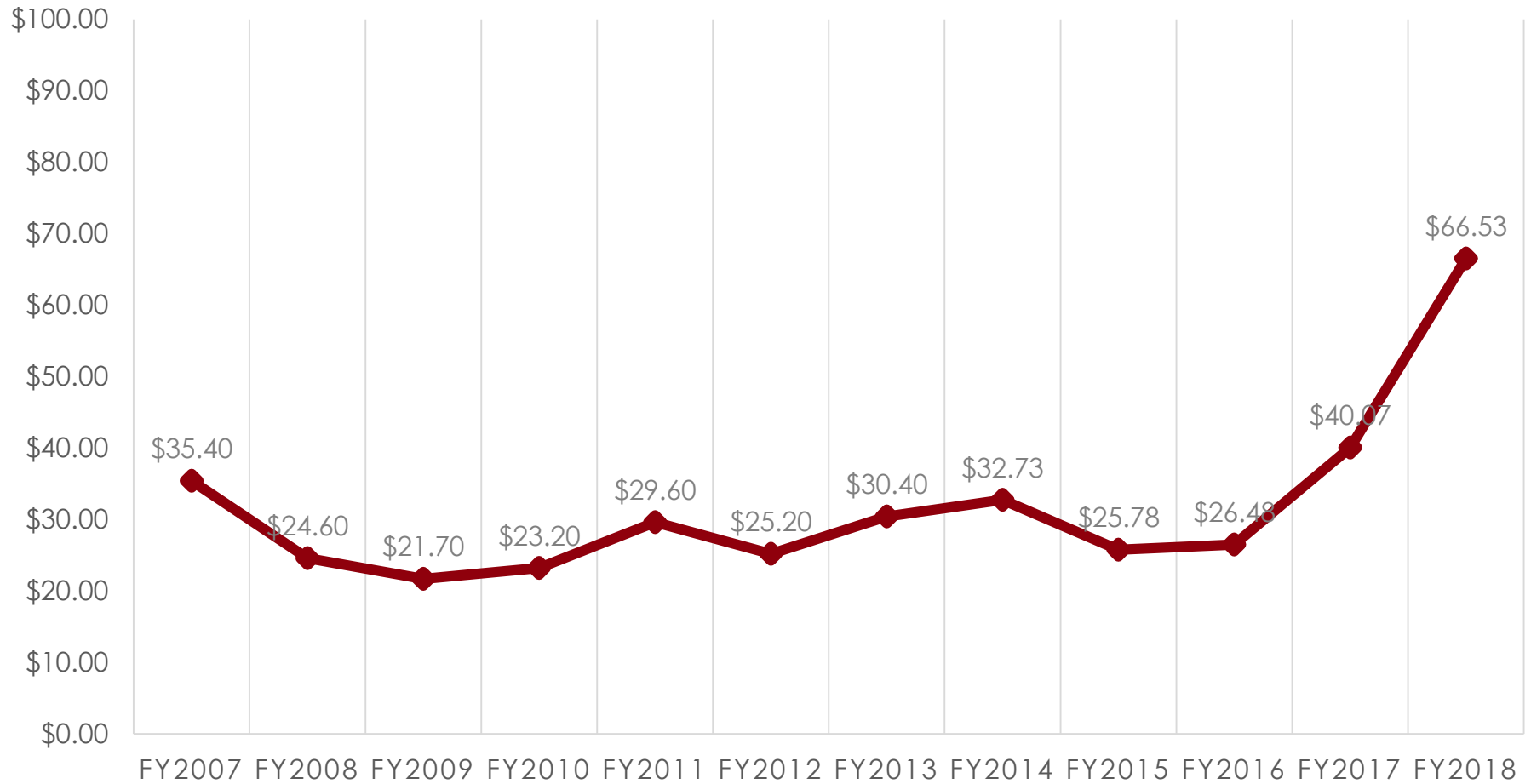


On-Island – Tracking Food & Beverage - Hotel



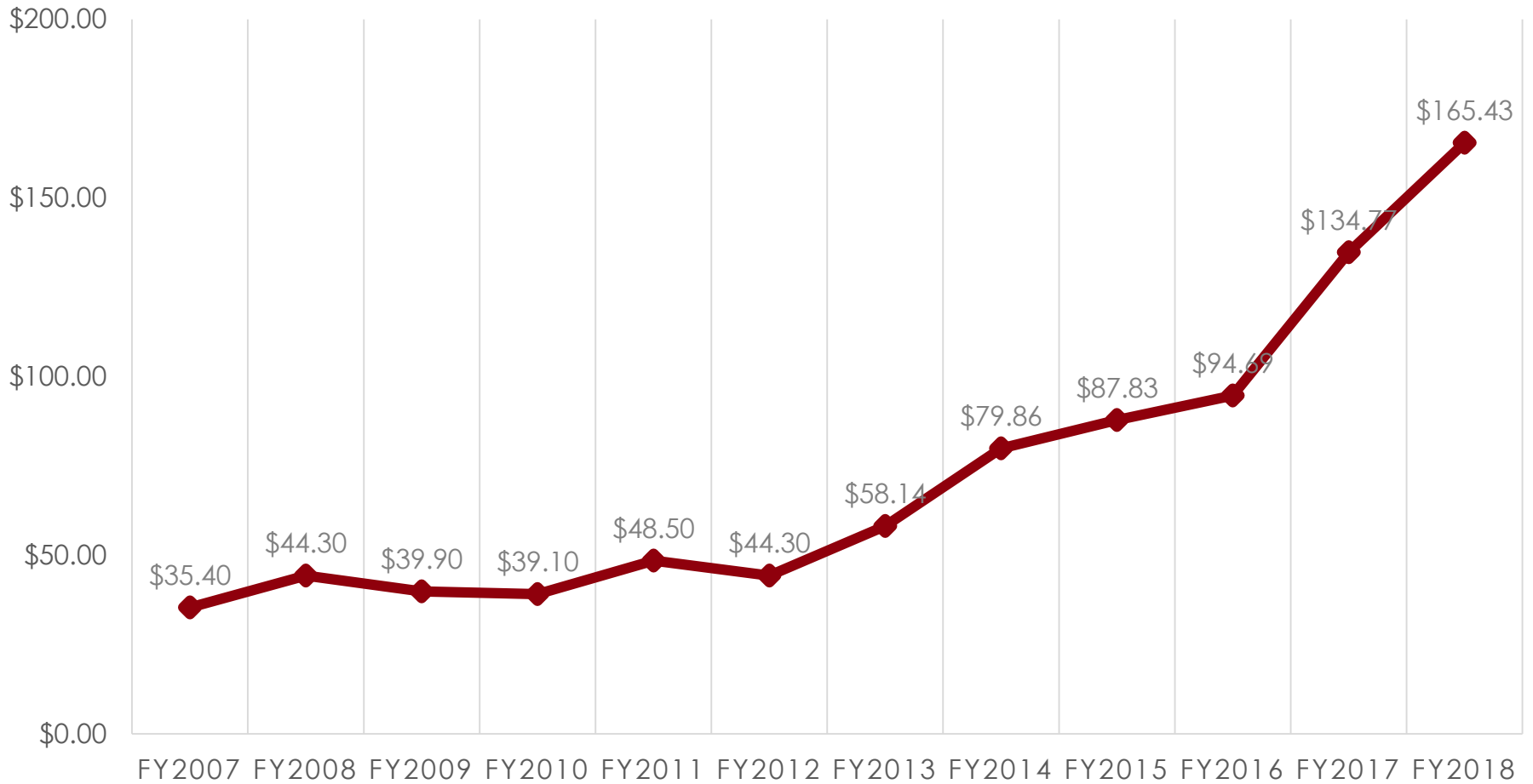
On-Island – Tracking

Food & Beverage – Fast Food/ Convenience Store

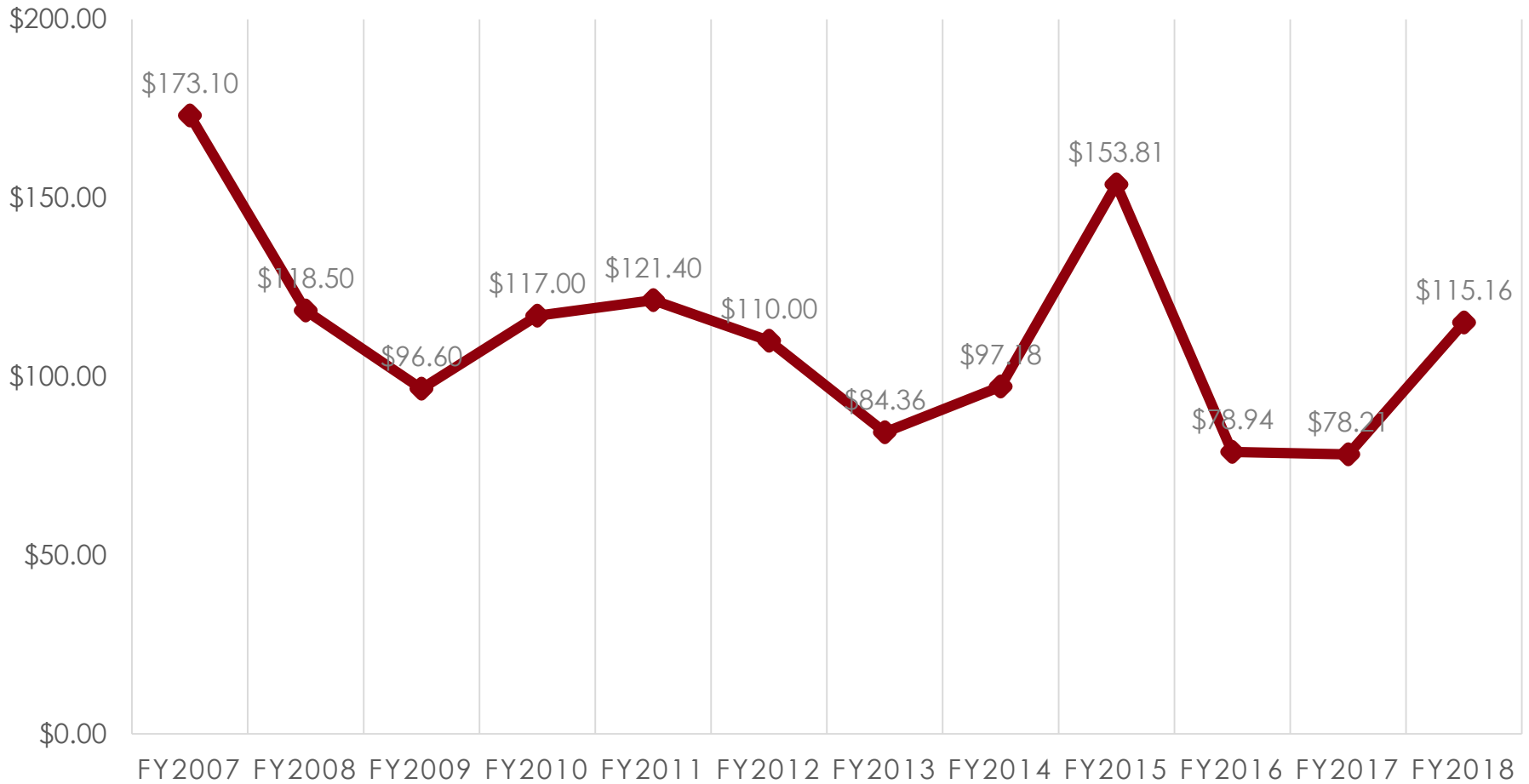


On-Island – Tracking

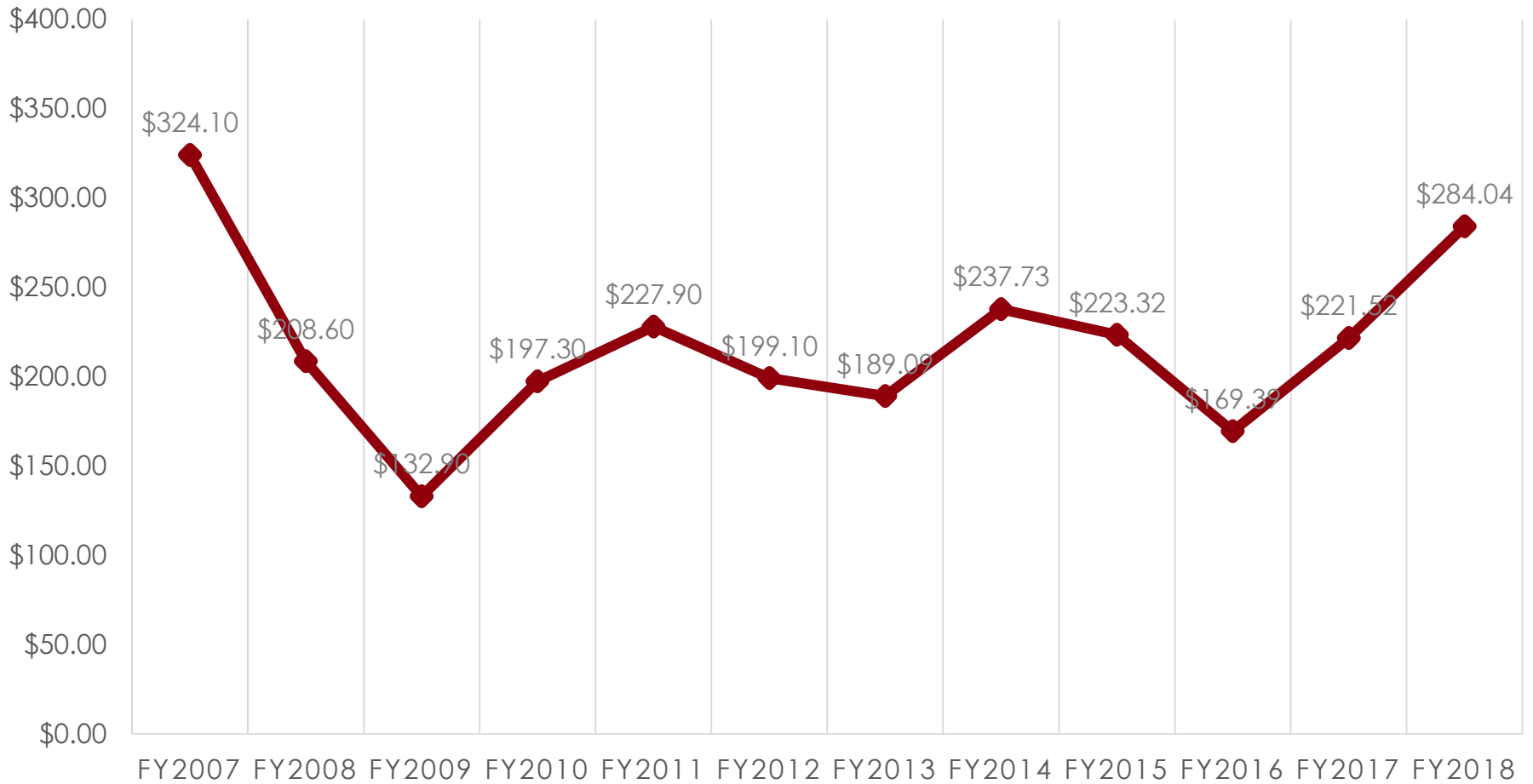
Food & Beverage – Restaurant/ Drinking Est Outside Hotel



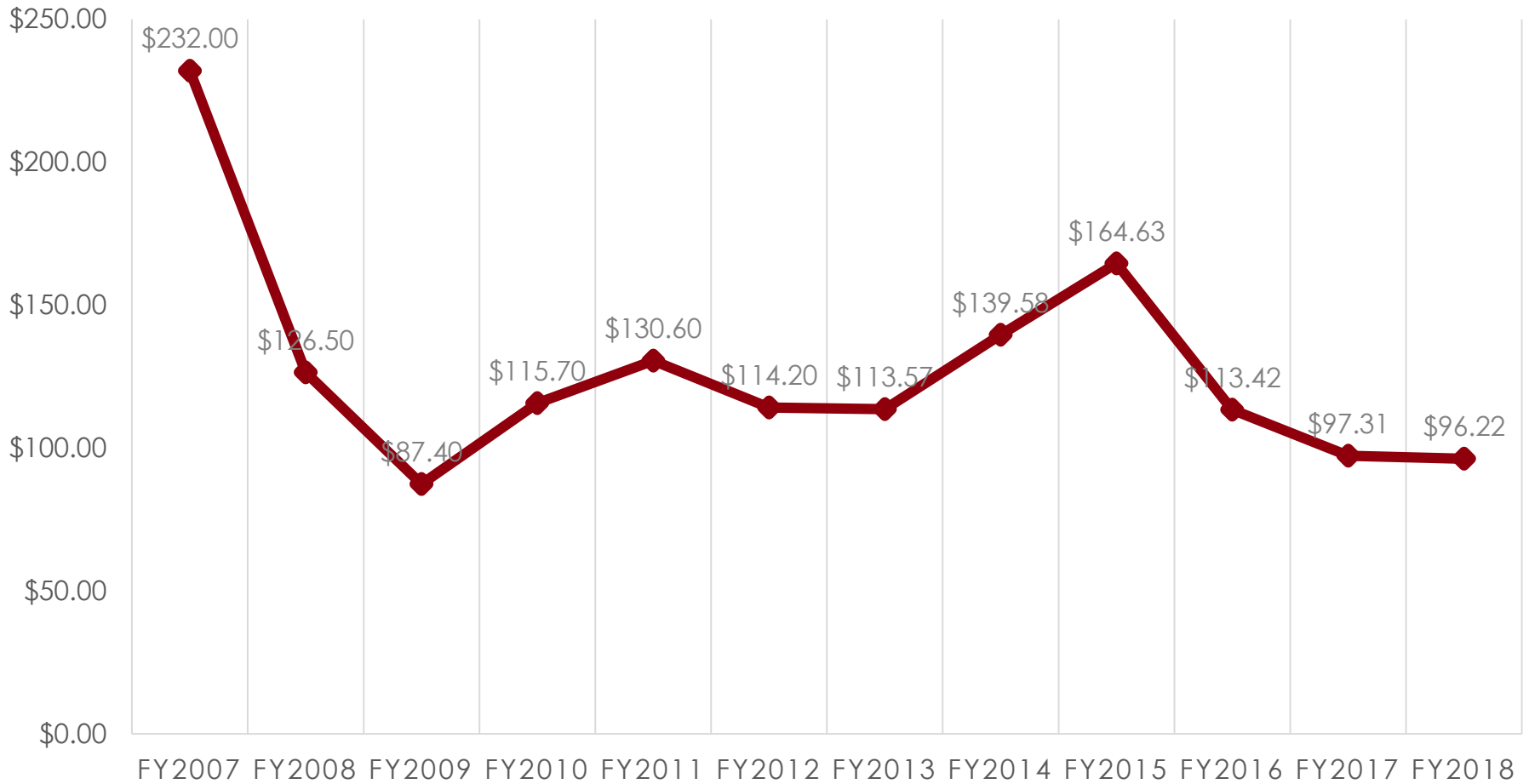
On-Island – Tracking Optional tour/ Activities



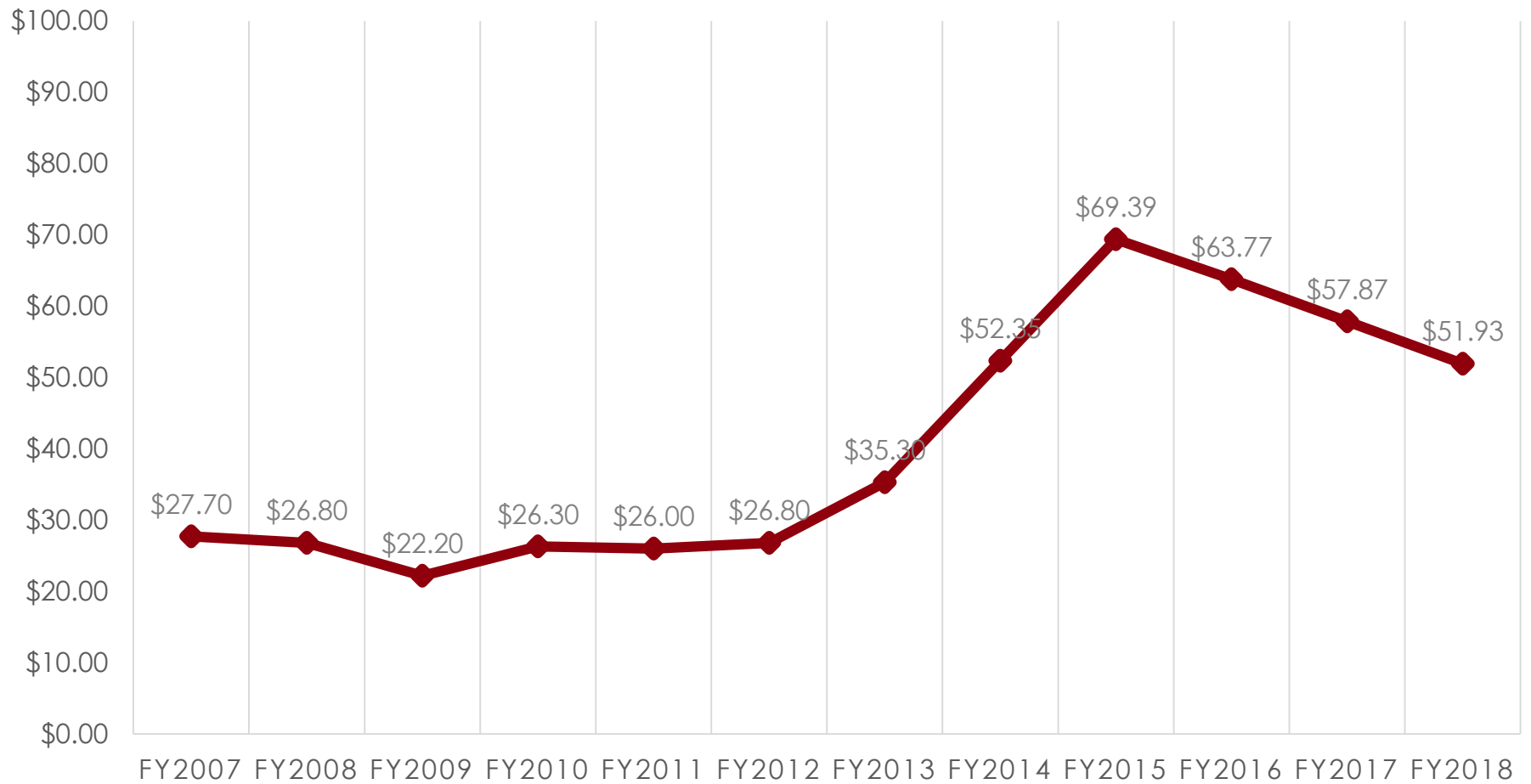
On-Island – Tracking Gift/ Souvenir – Self/ Companion



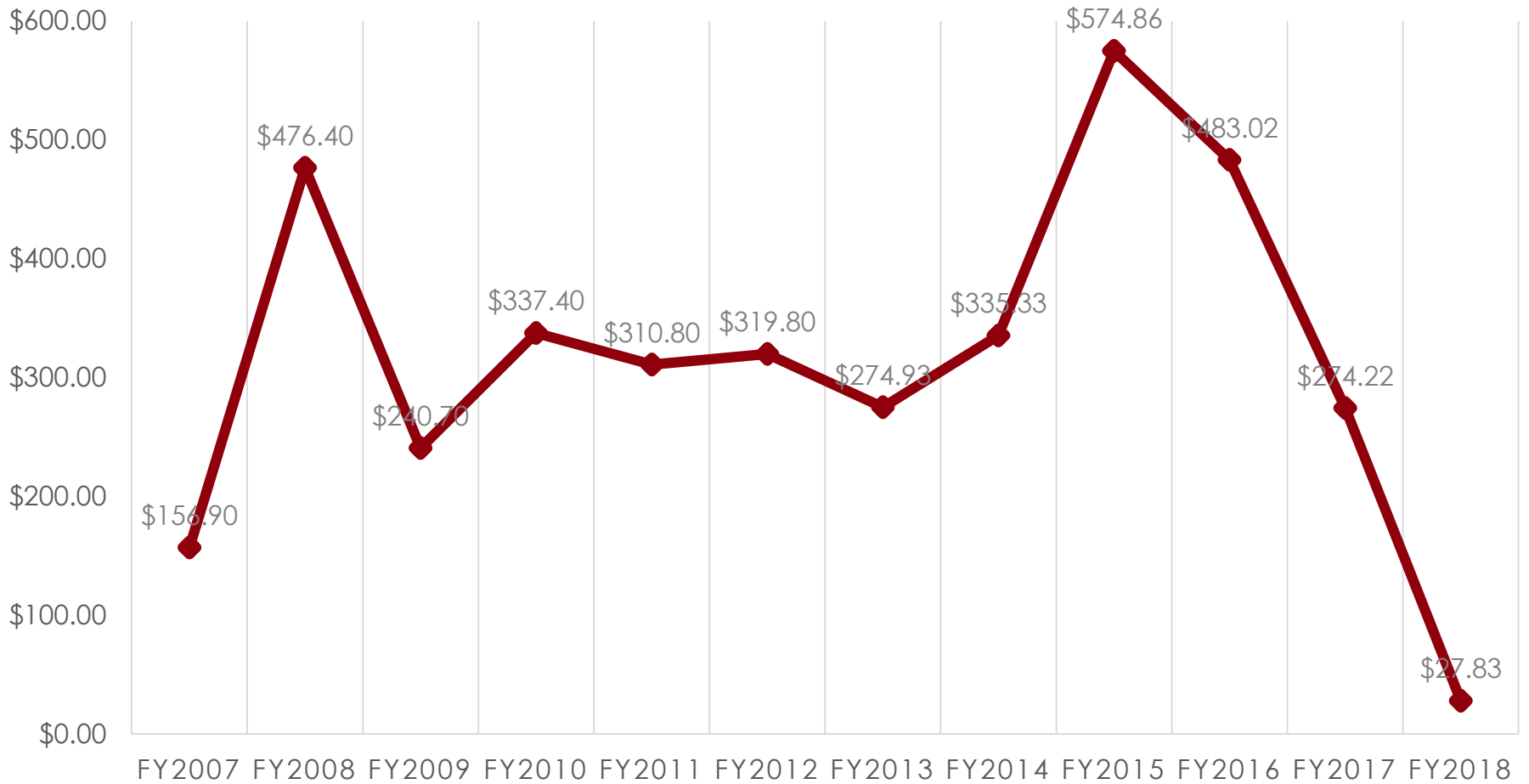
On-Island – Tracking Gift/ Souvenir – Friends/ Family



On-Island – Tracking Local Transportation



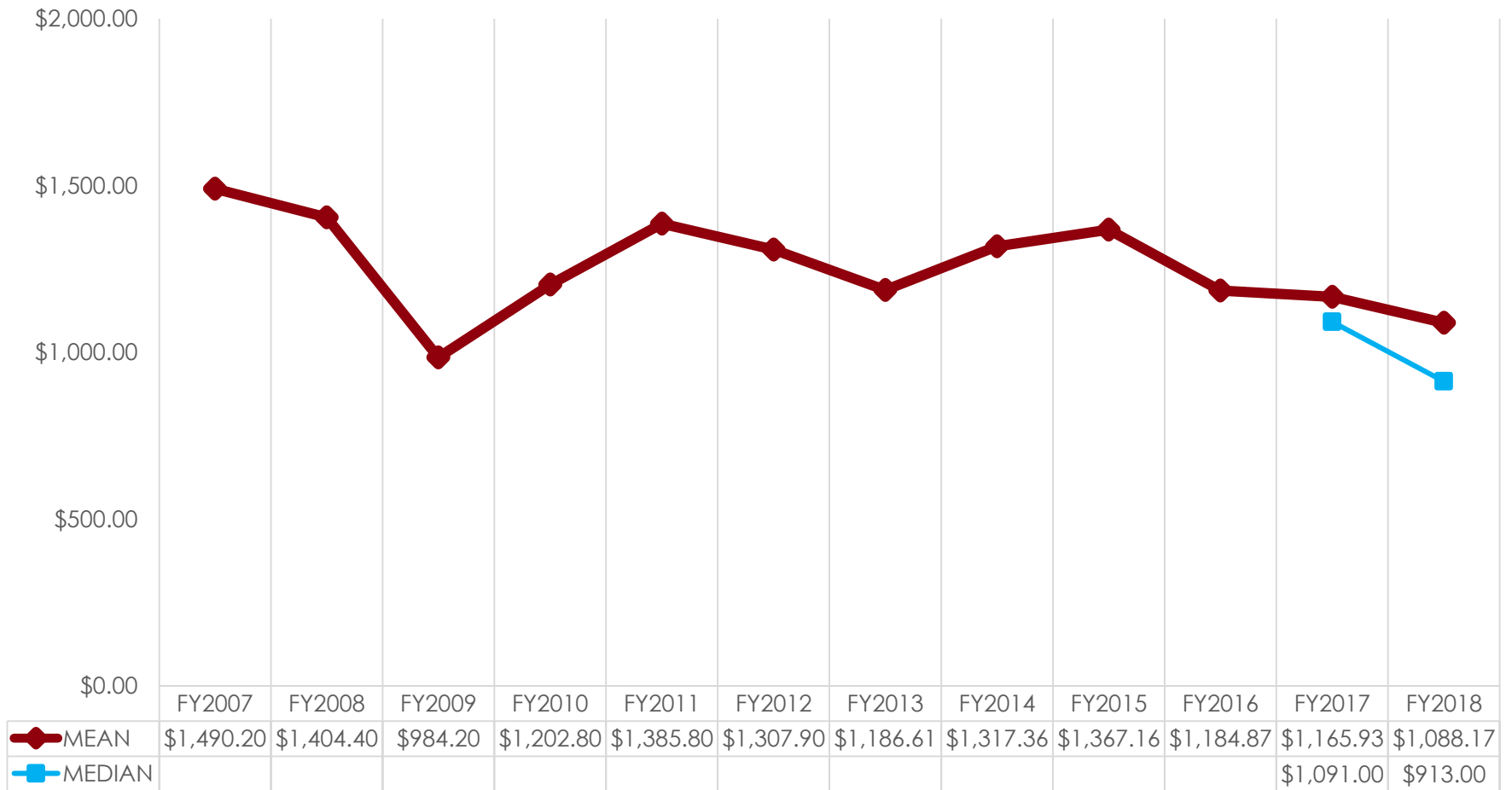
On-Island – Tracking Other Not Included



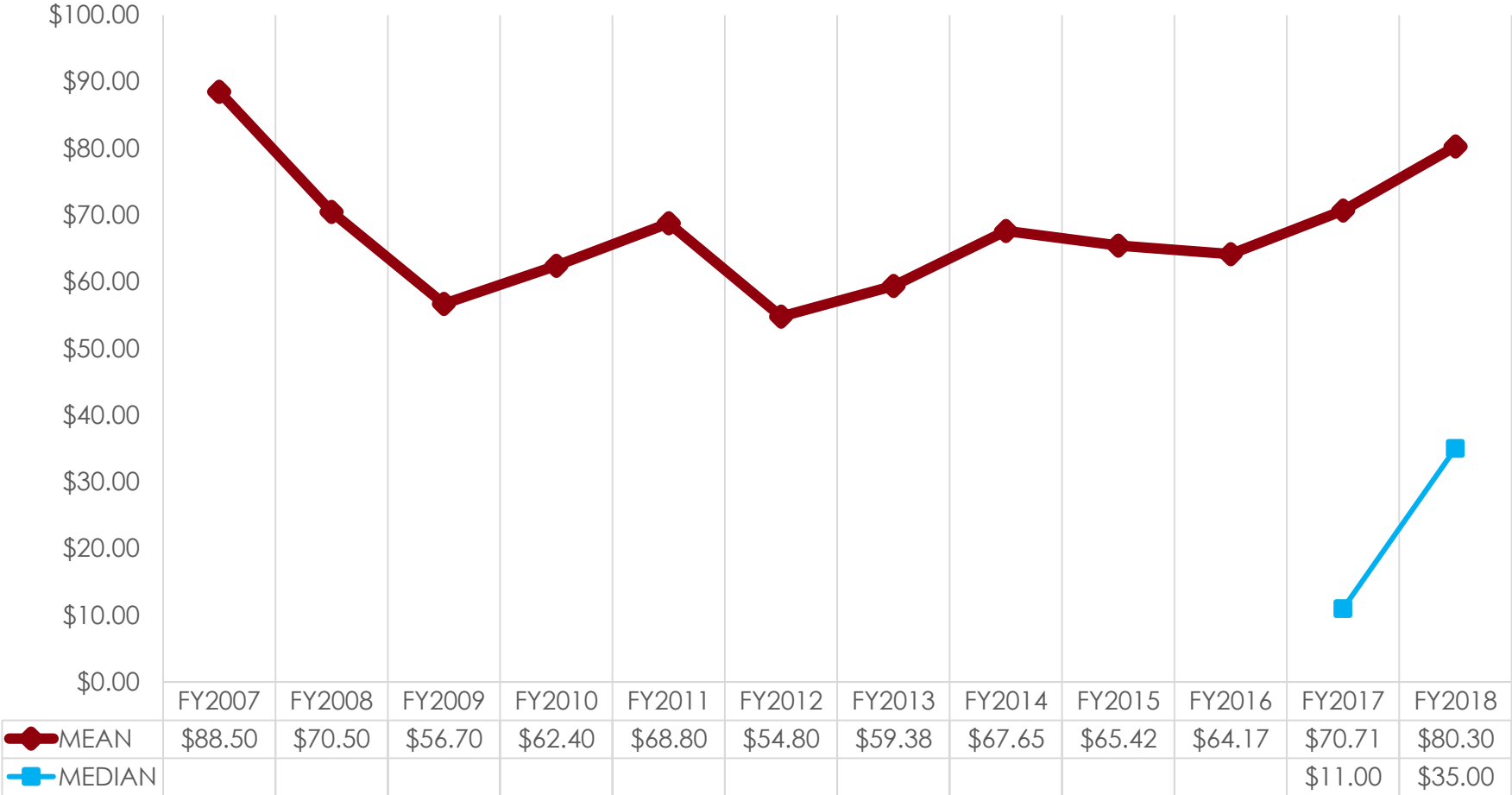
TOTAL (On-Isle + Prepaid) Expenditures Per Person

- \$1,088.17 = TOTAL Per Person Expenditure

TOTAL Per Person Expenditures – Tracking



GUAM AIRPORT EXPENDITURE – Tracking

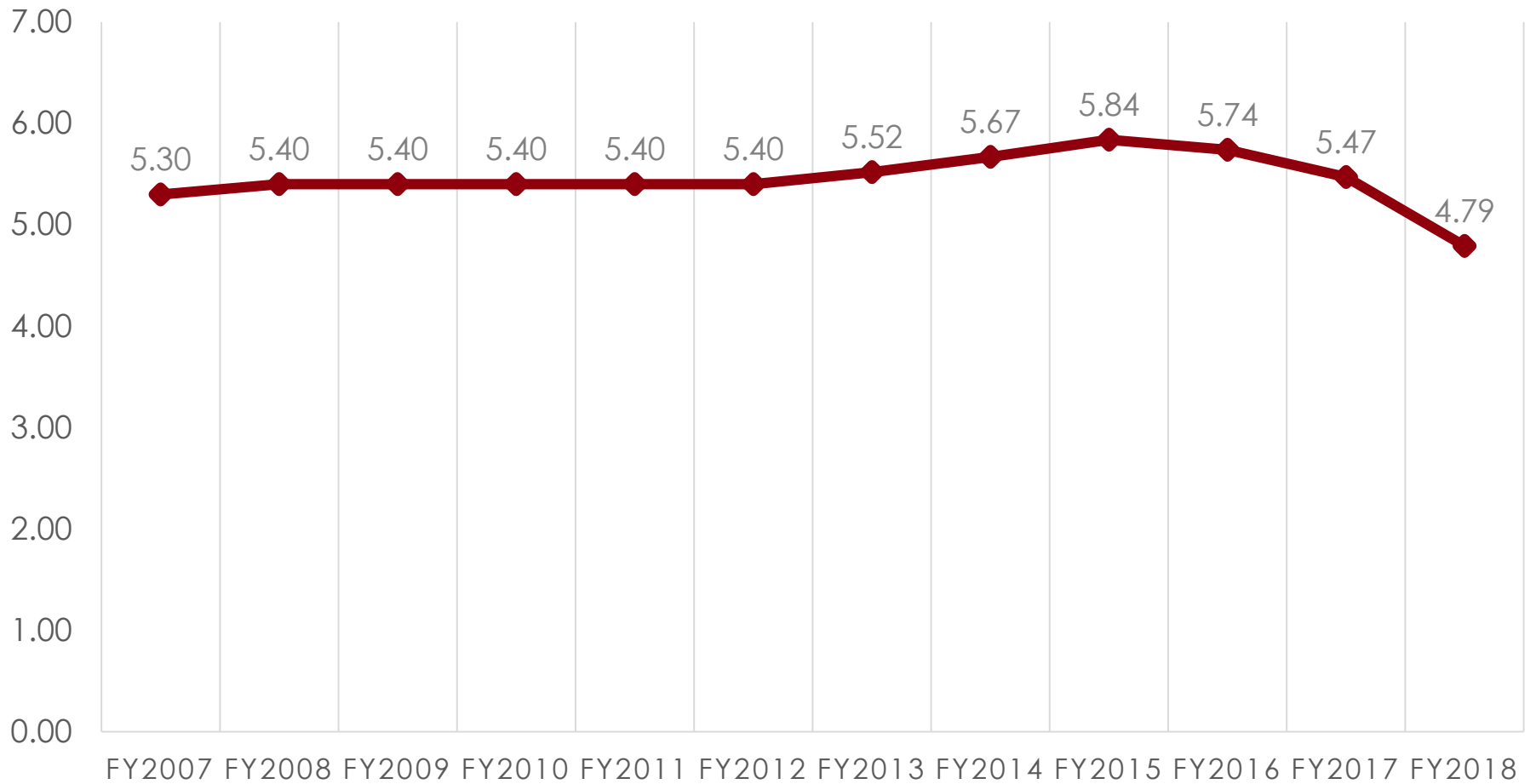


SECTION 4

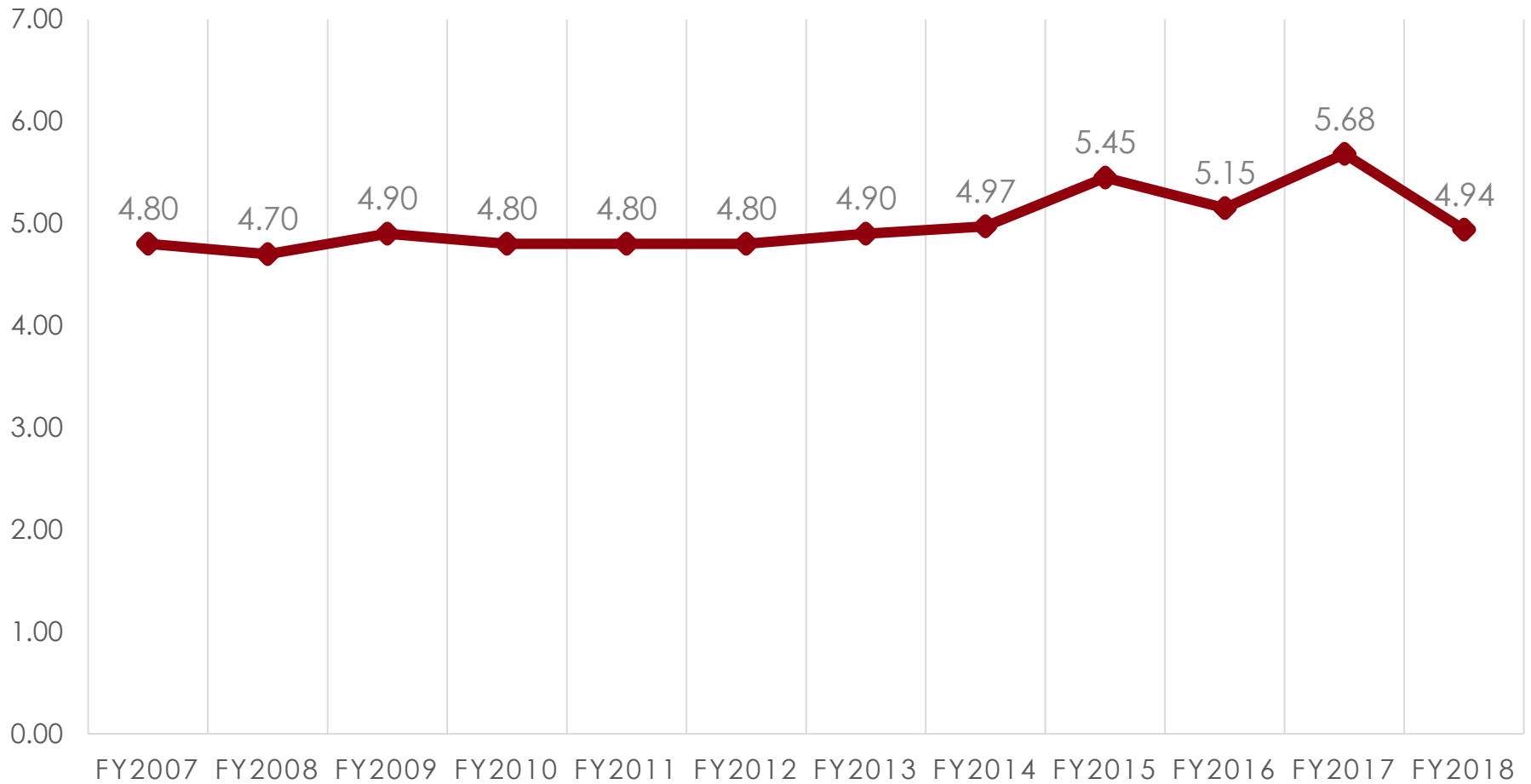
VISITOR SATISFACTION

BEHAVIOR

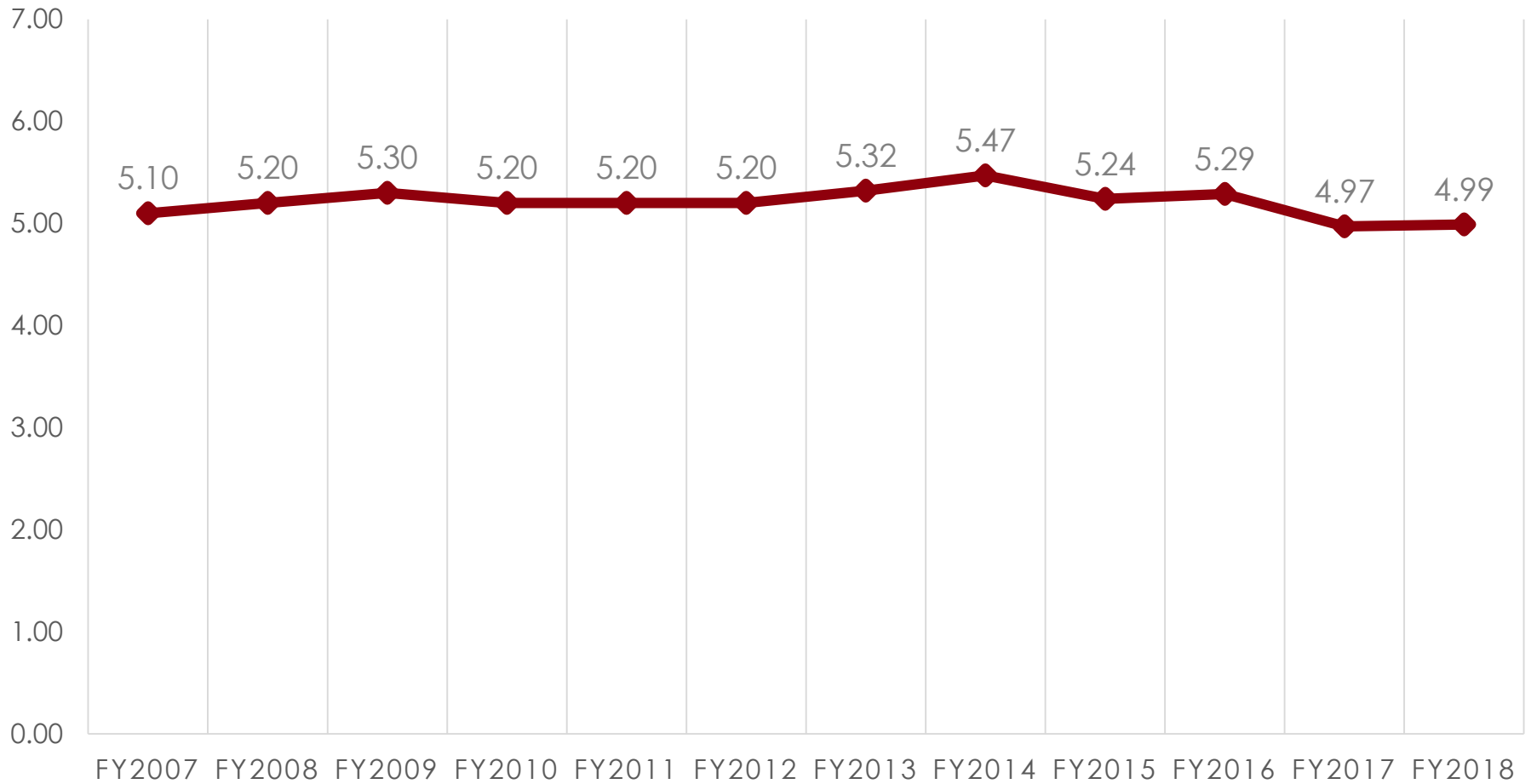
OVERALL SATISFACTION



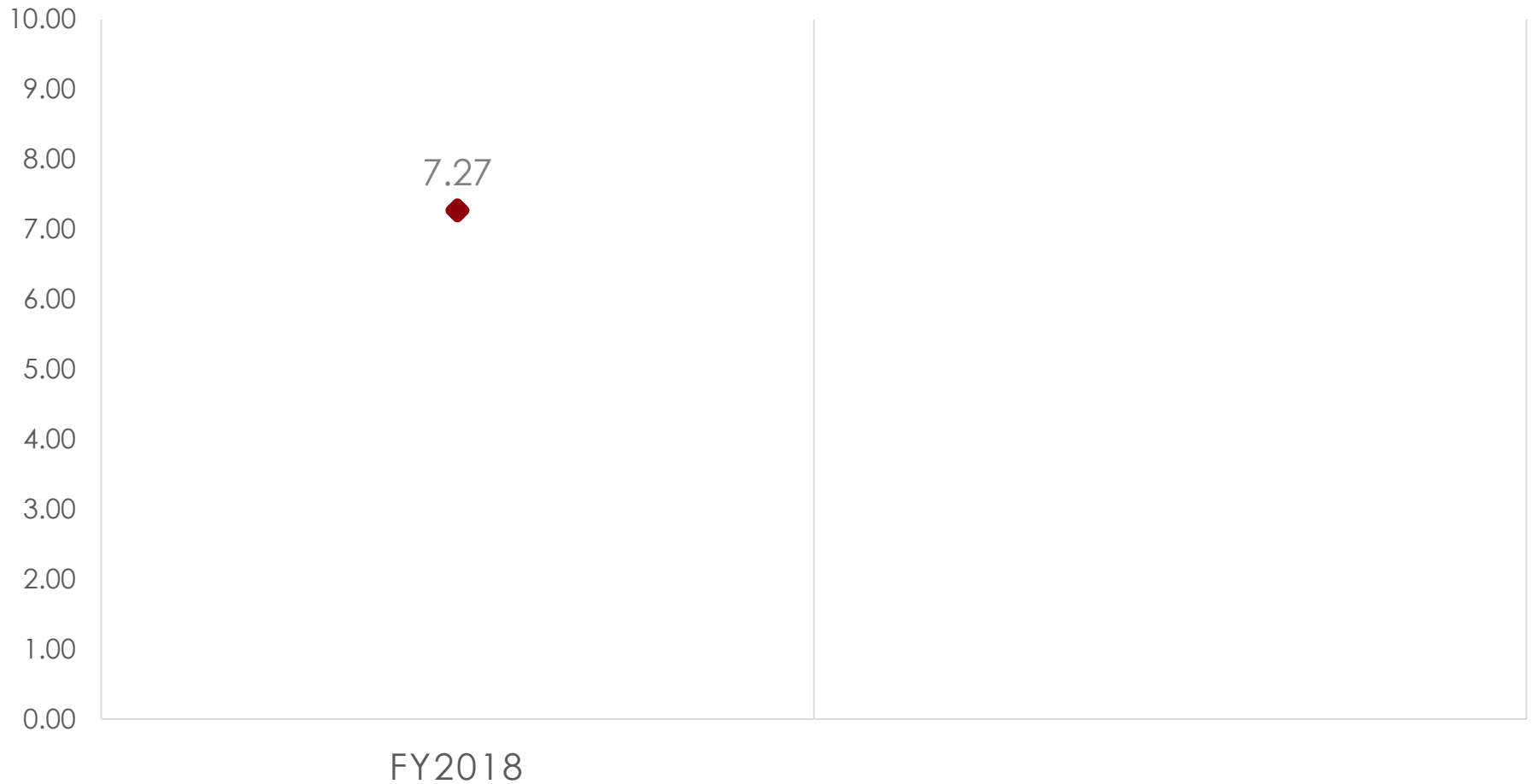
Guam was better than expected



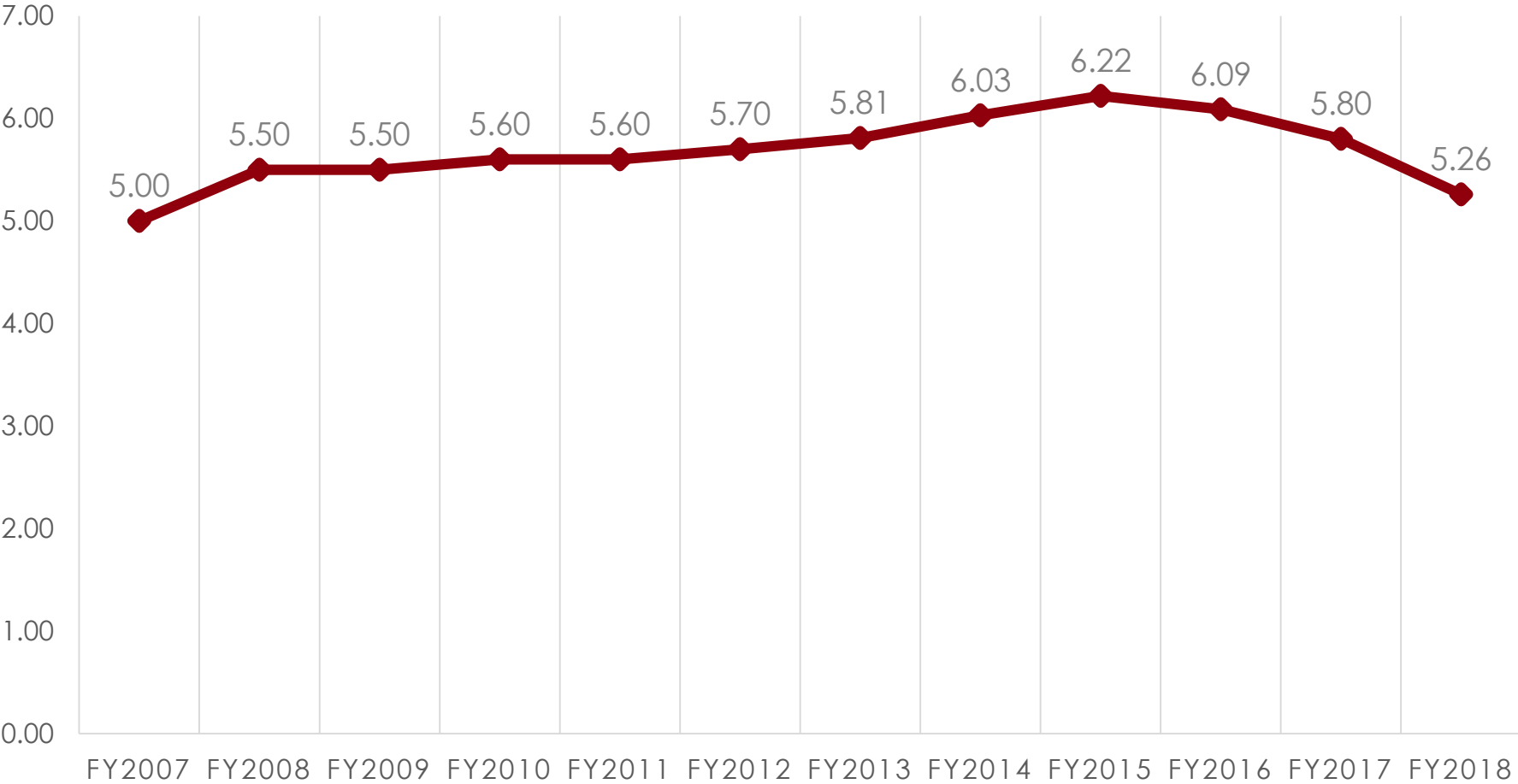
I had no communication problems



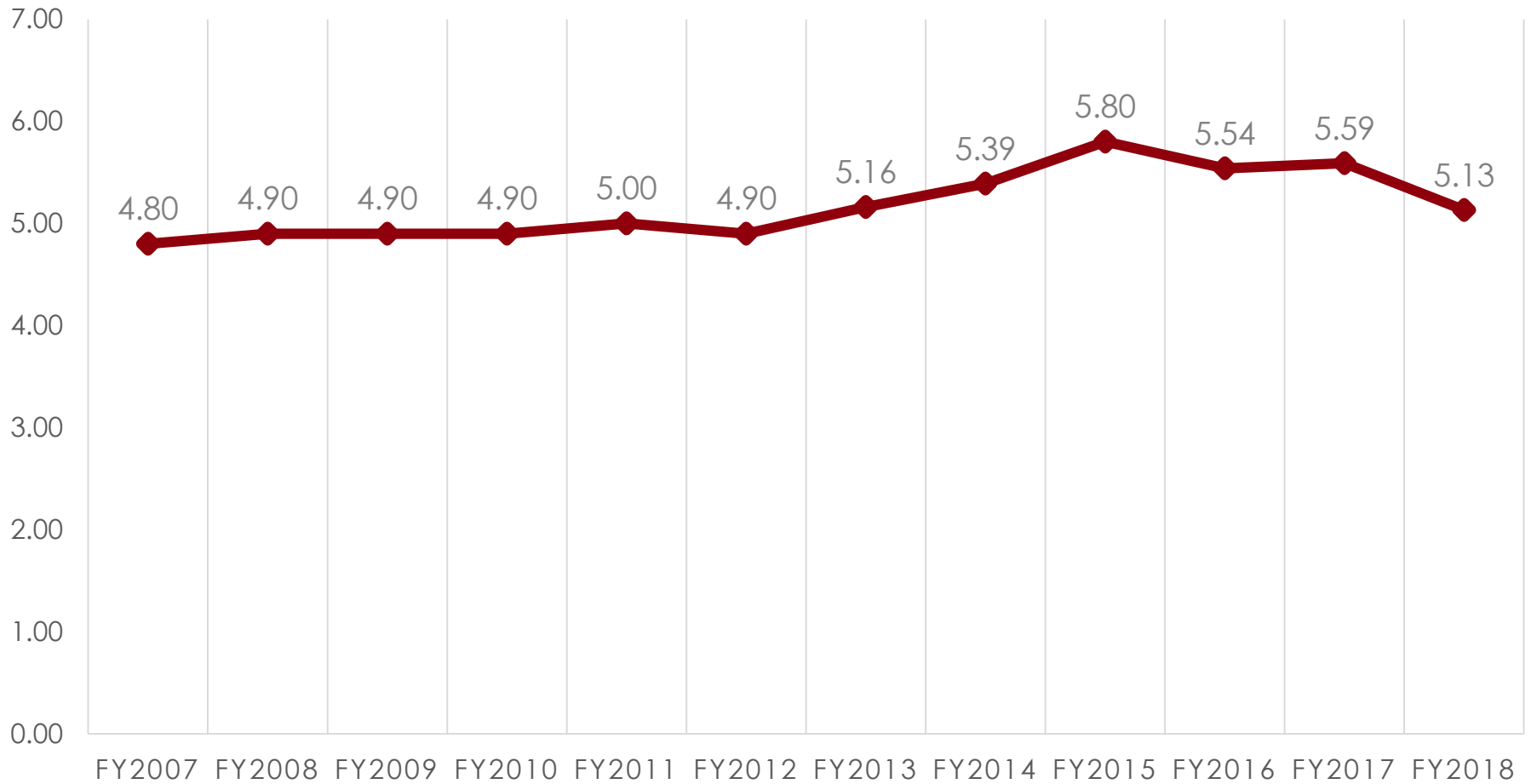
Recommend Guam- family & friends (10PT SCALE)



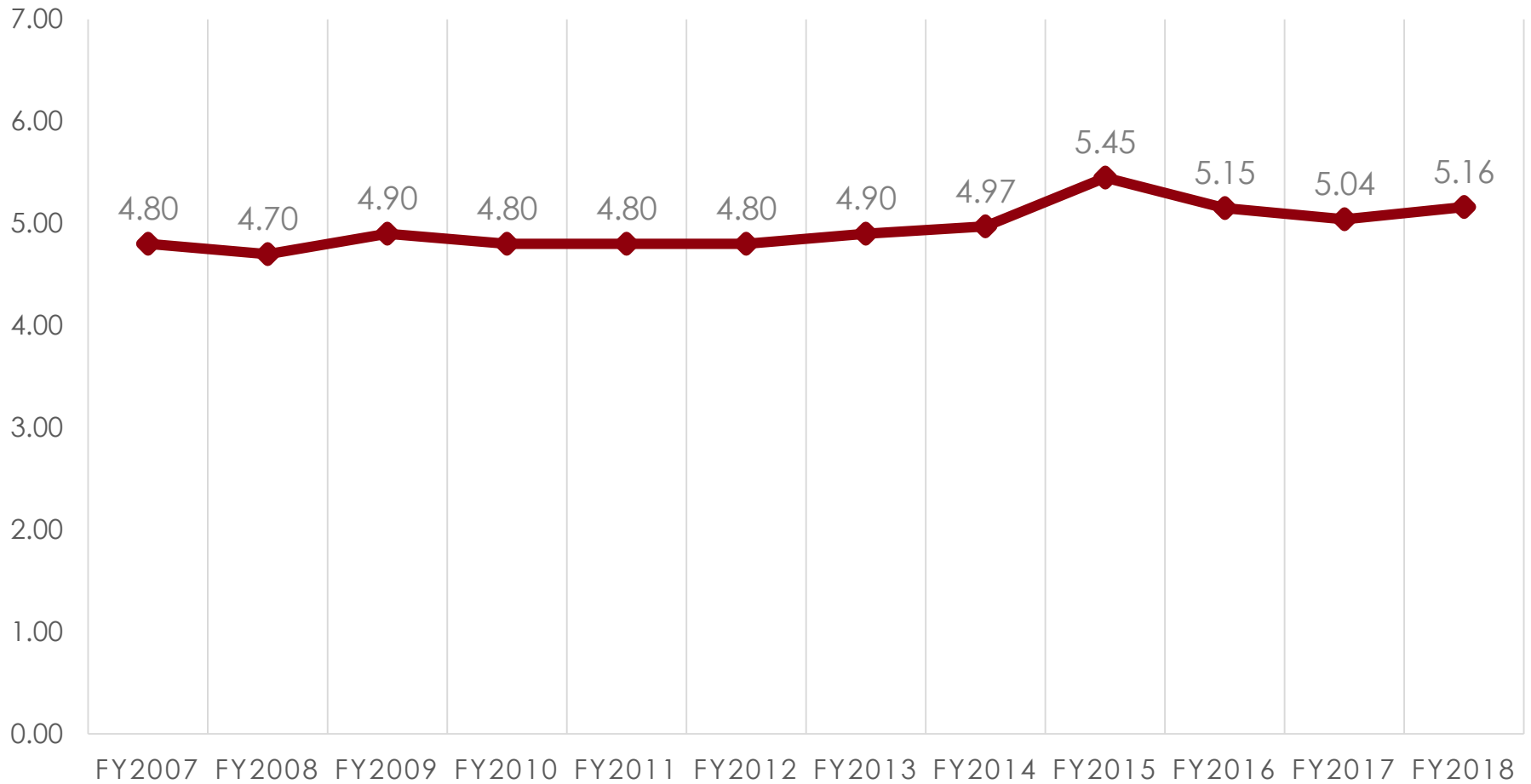
Sites on Guam were attractive



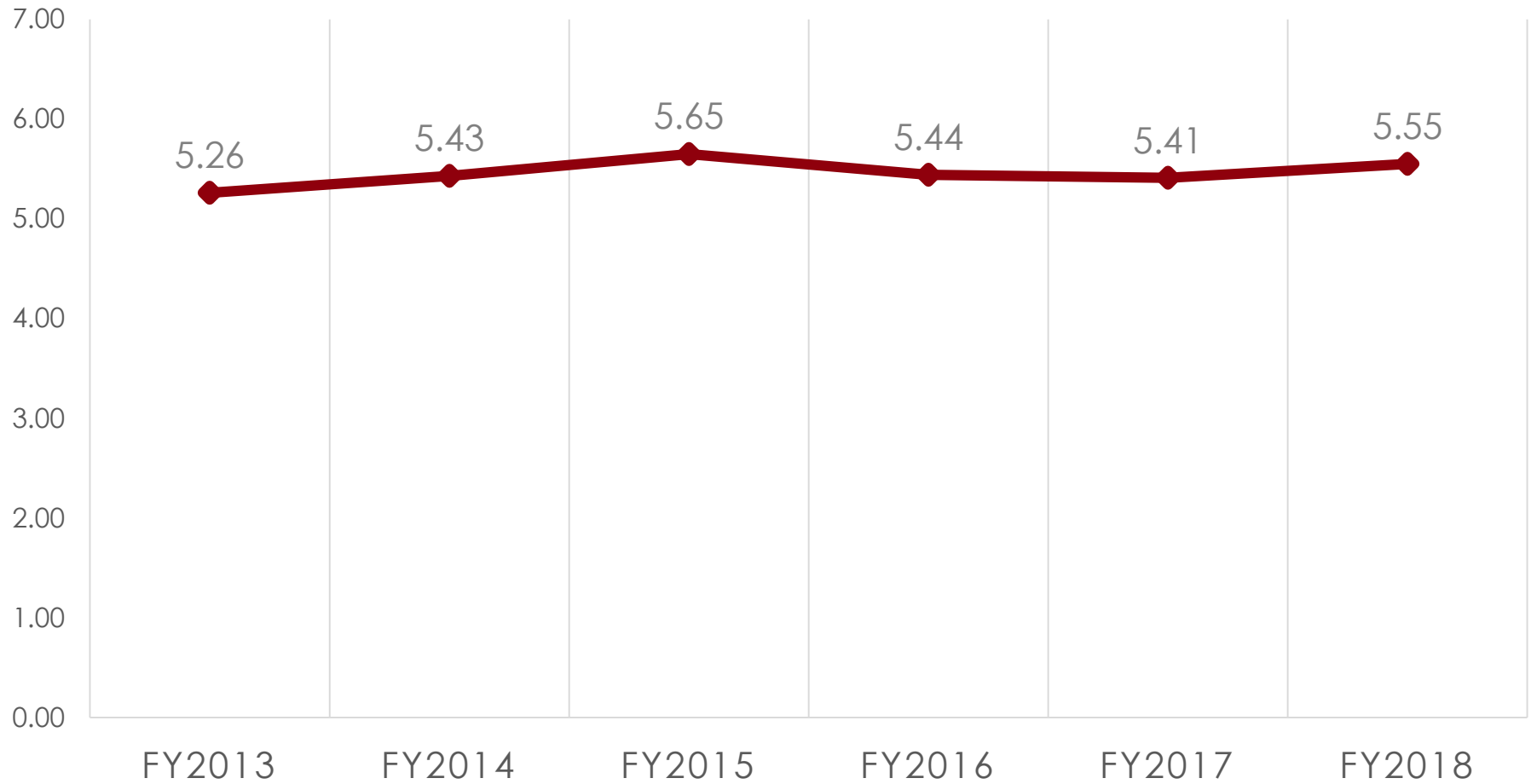
I plan to visit Guam again



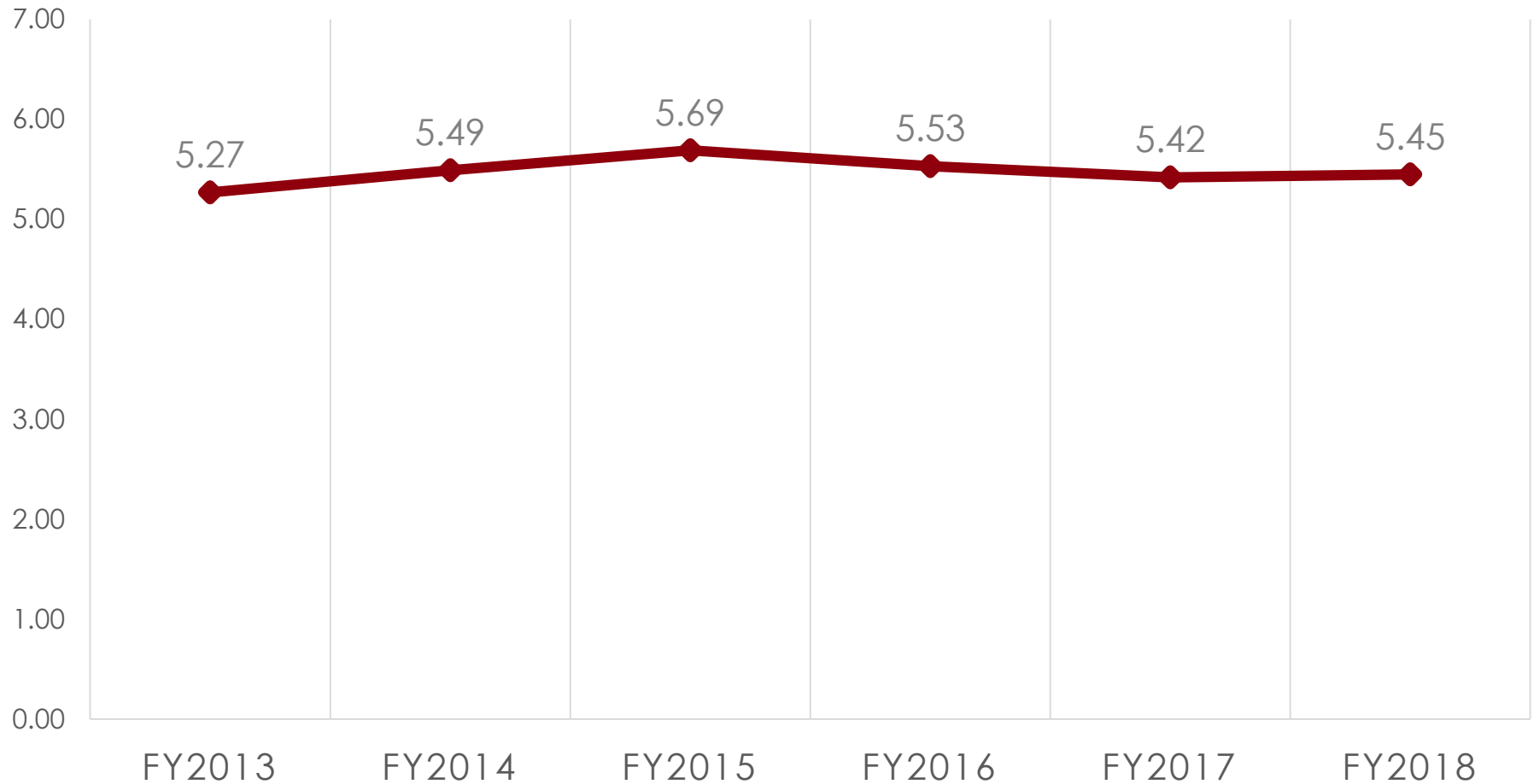
Not enough night time activities



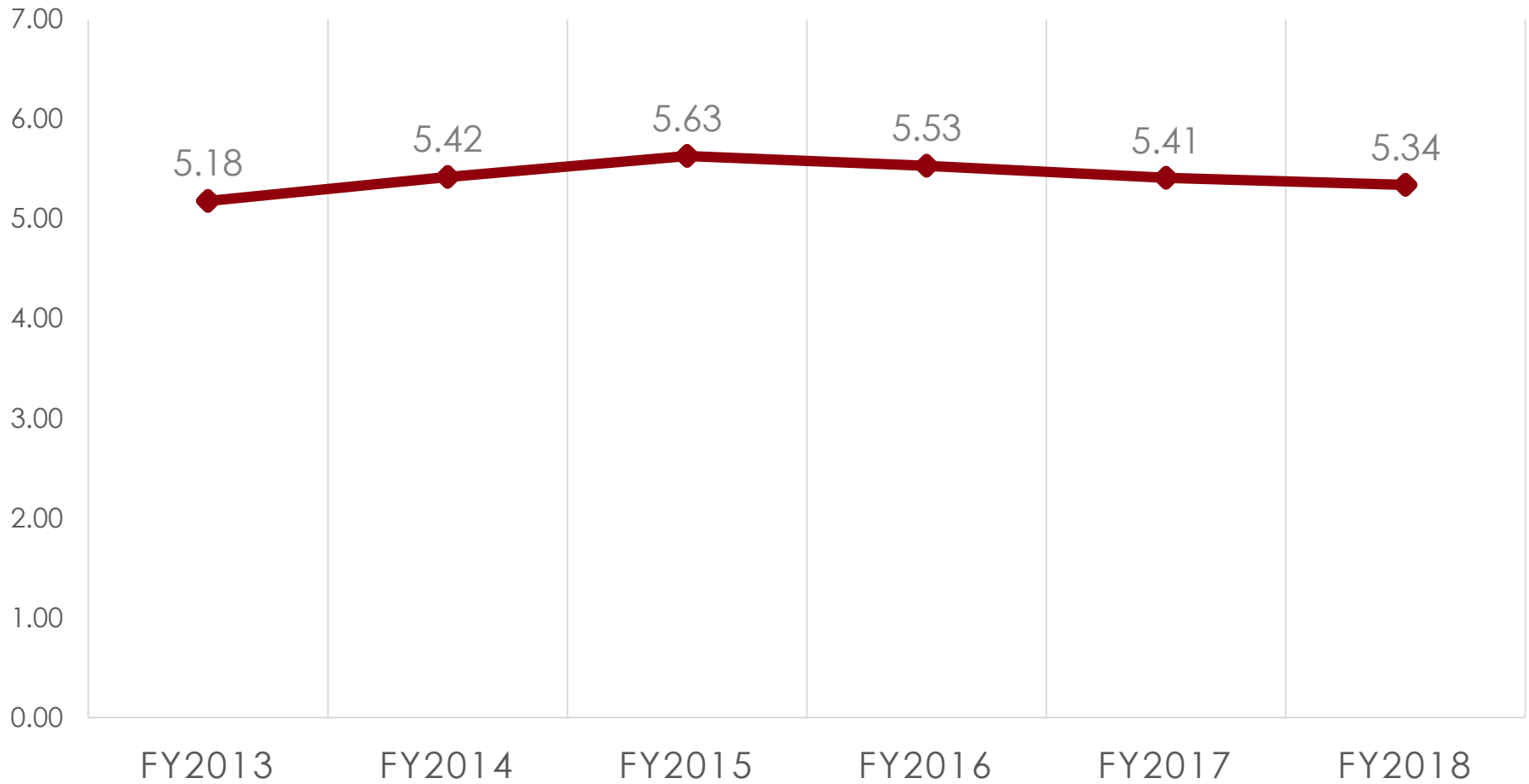
Tour guides were professional



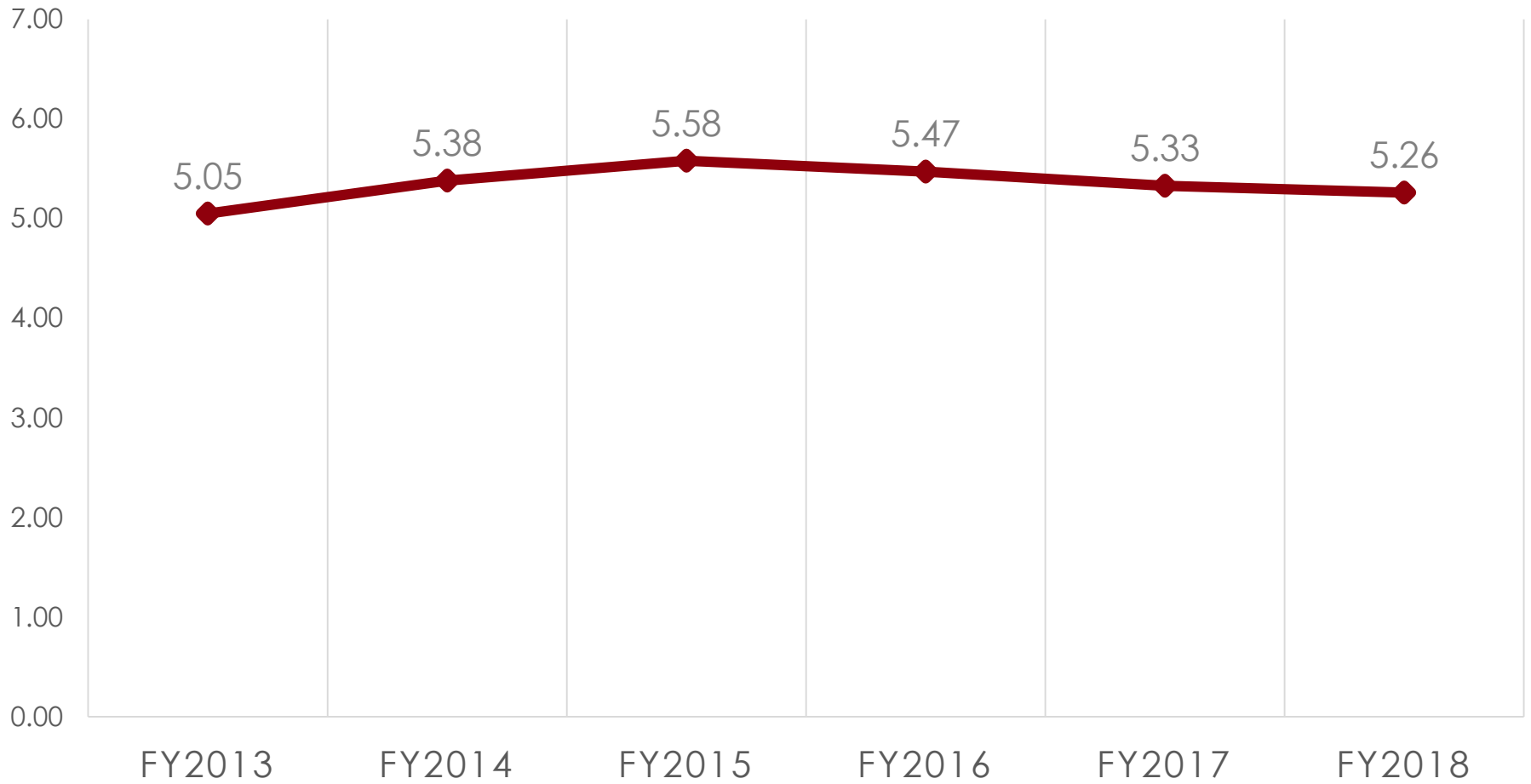
Tour drivers were professional



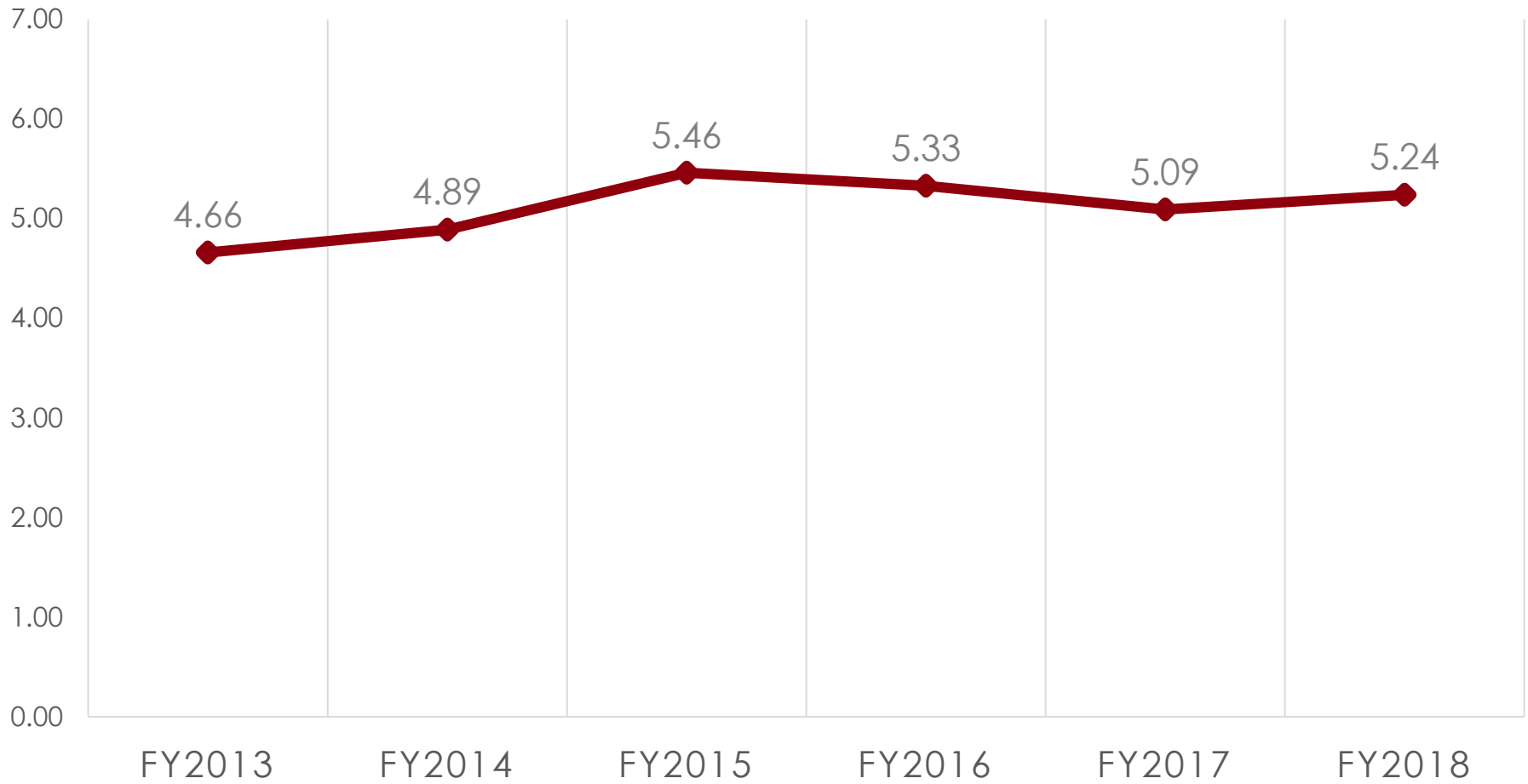
Taxi drivers were professional



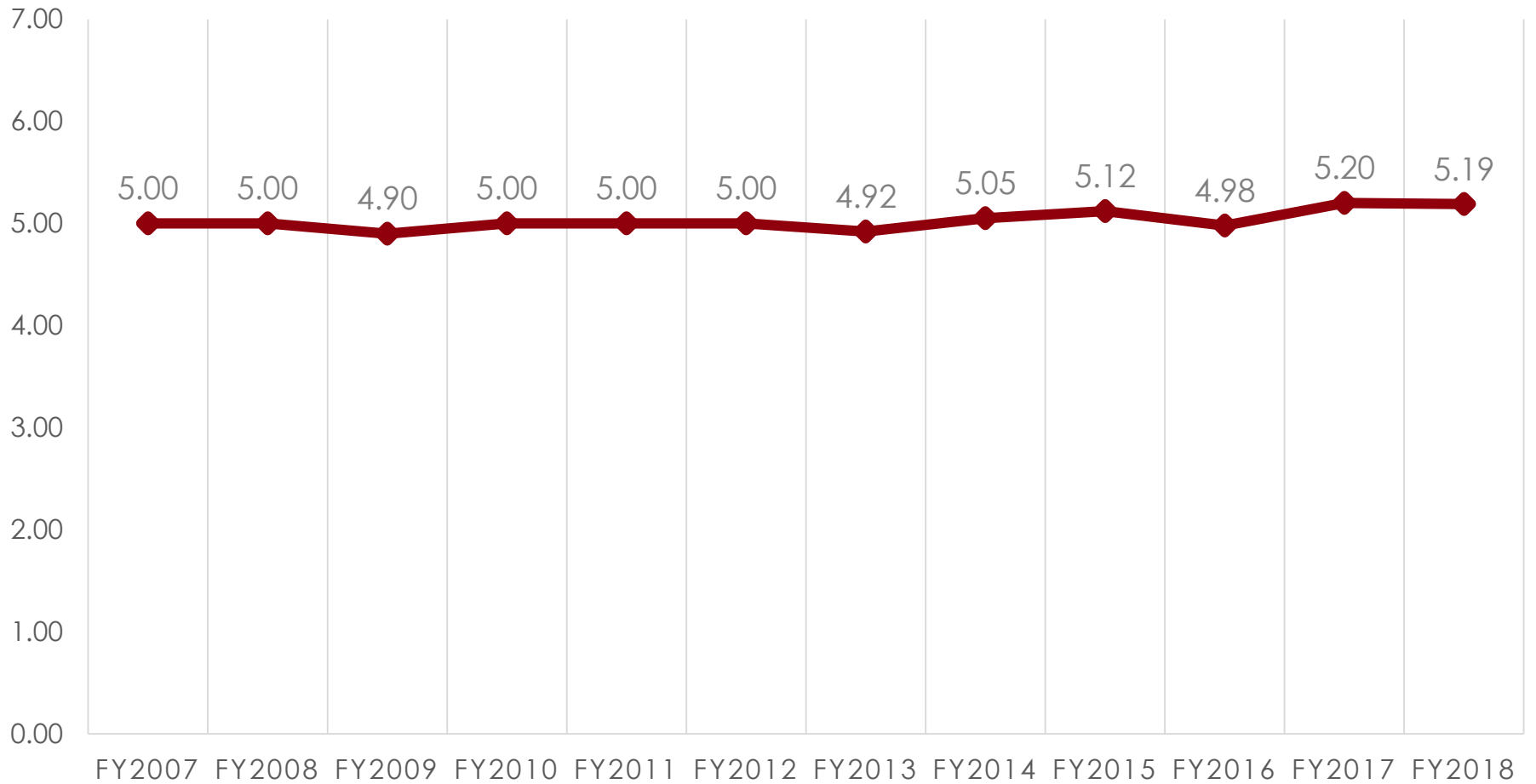
Taxis were clean



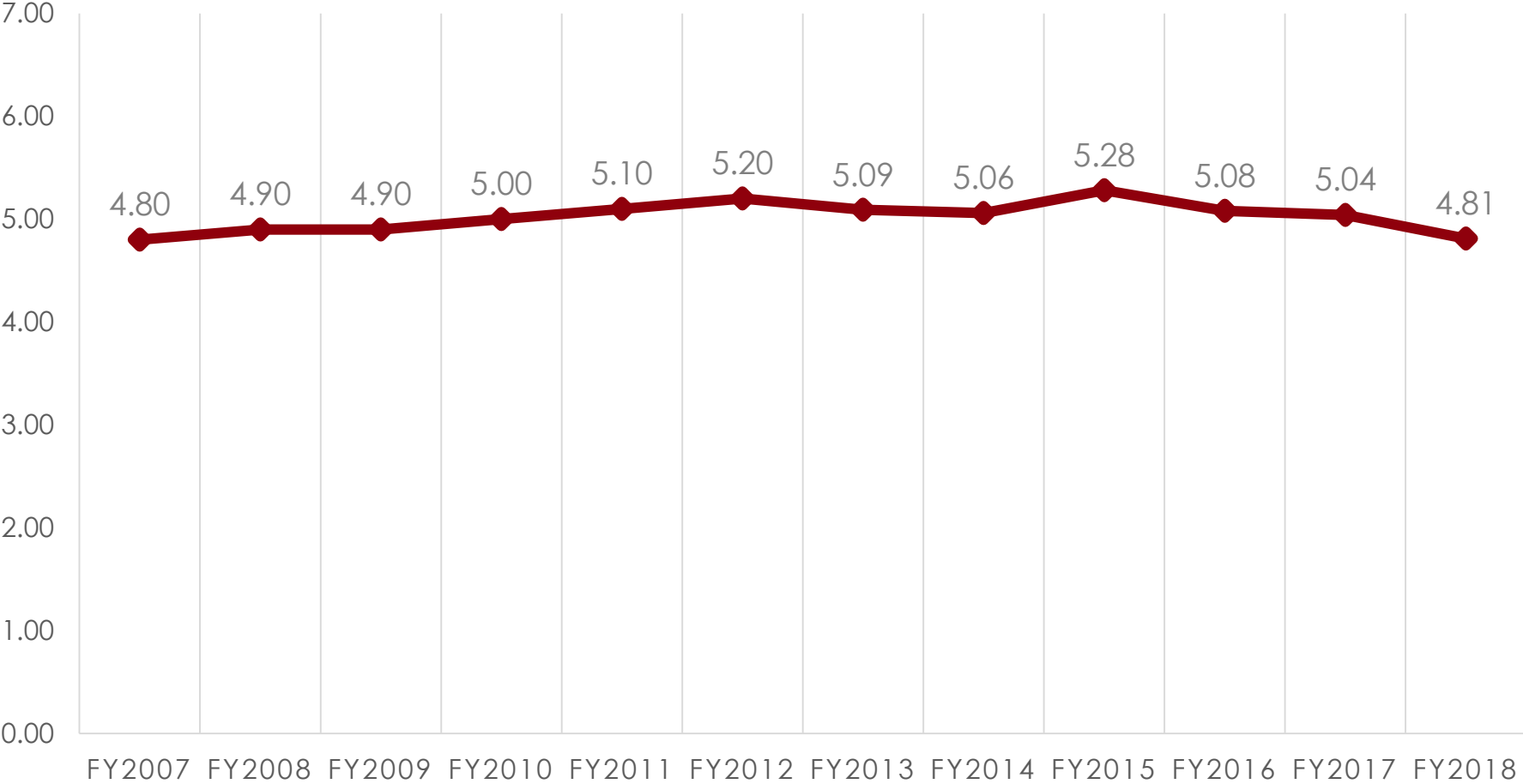
Guam airport was clean



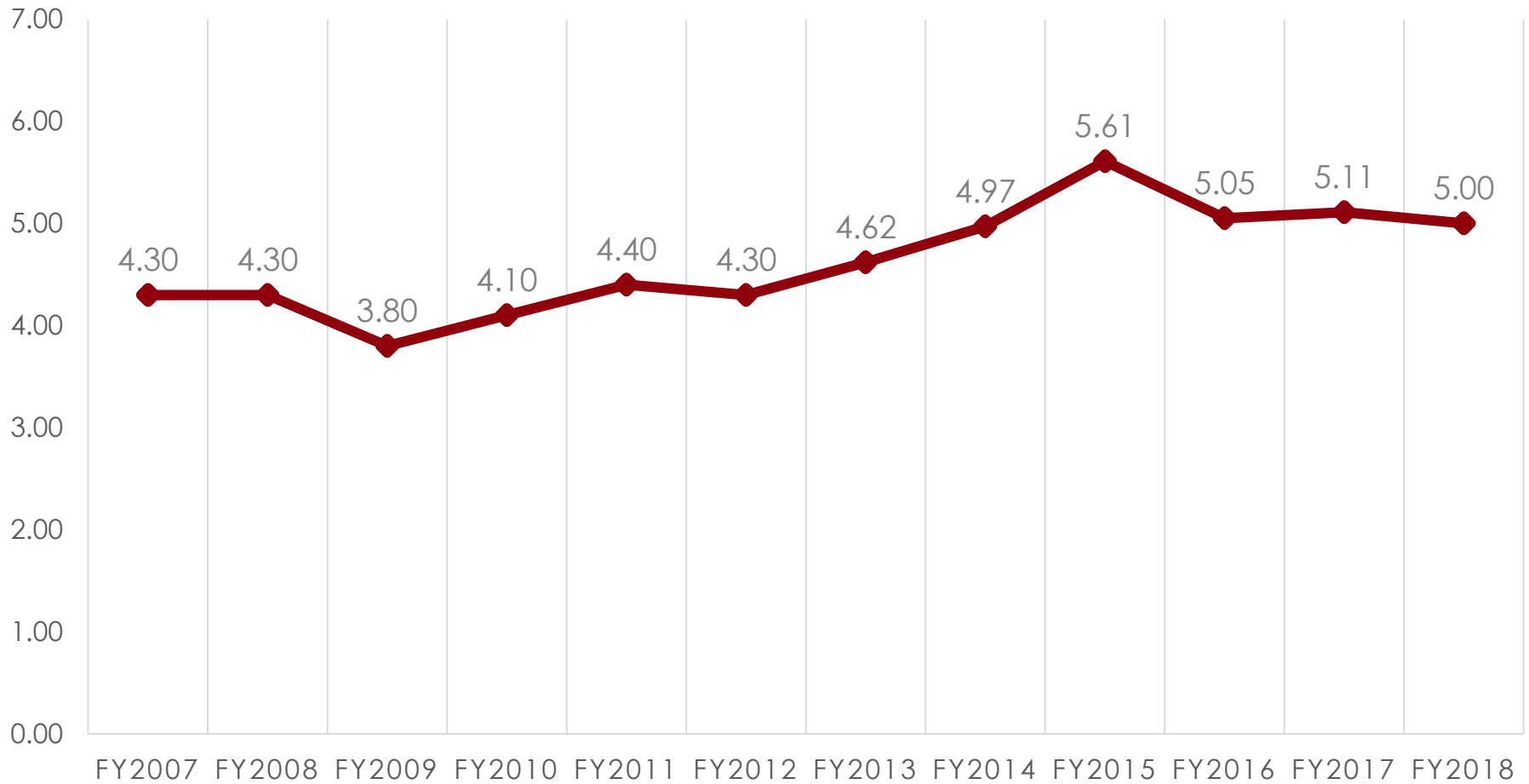
Ease of getting around



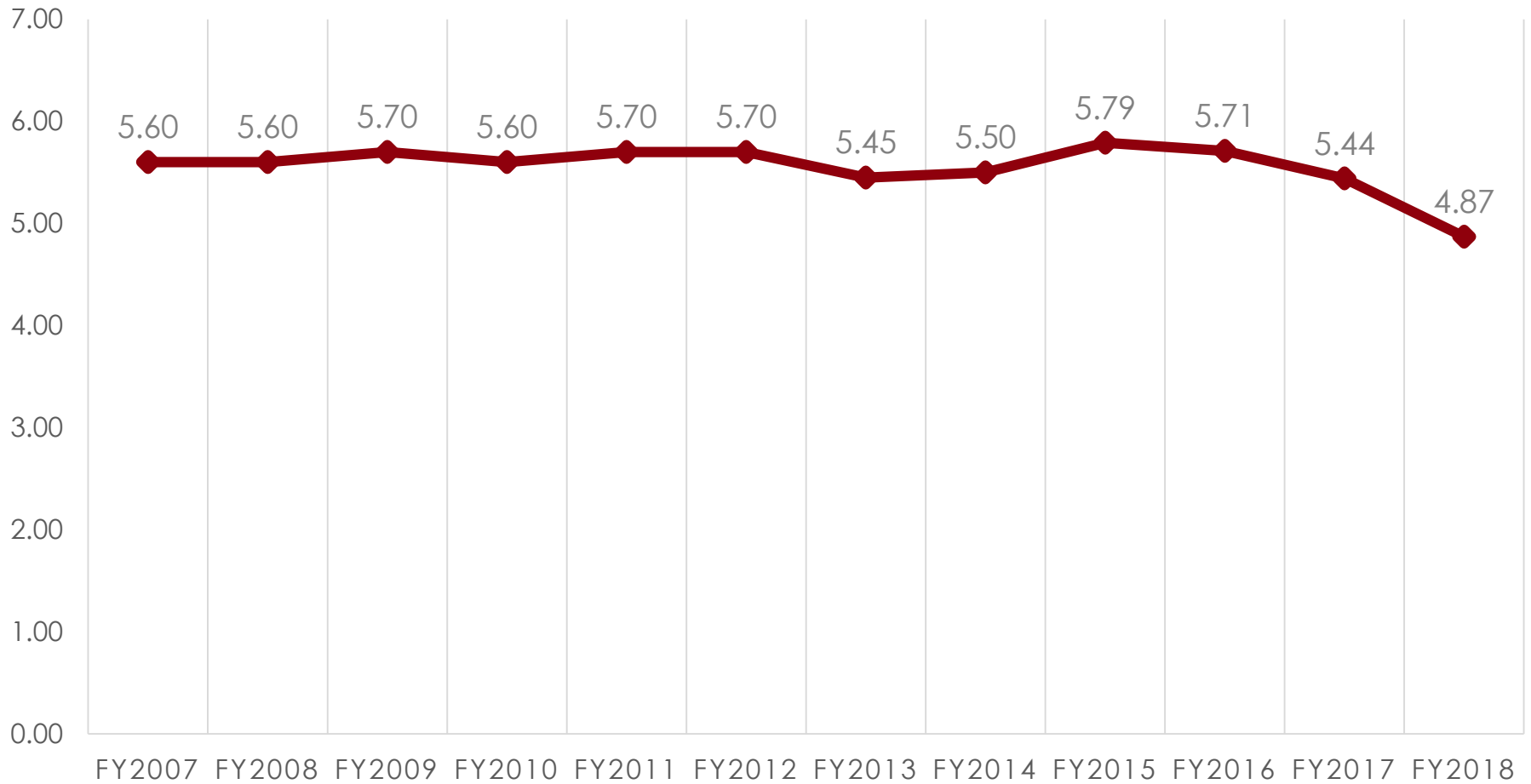
Safety walking around at night



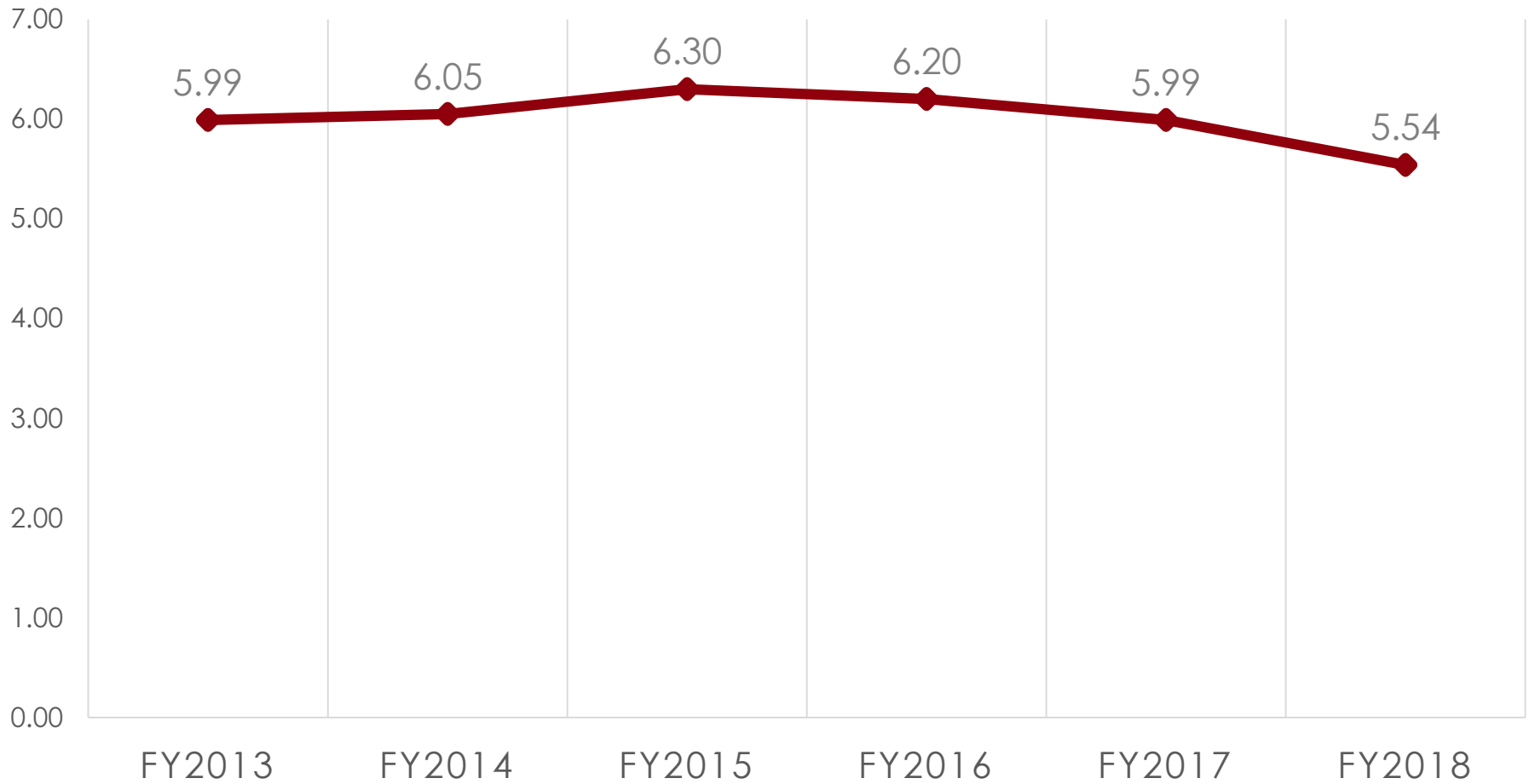
Price of things on Guam



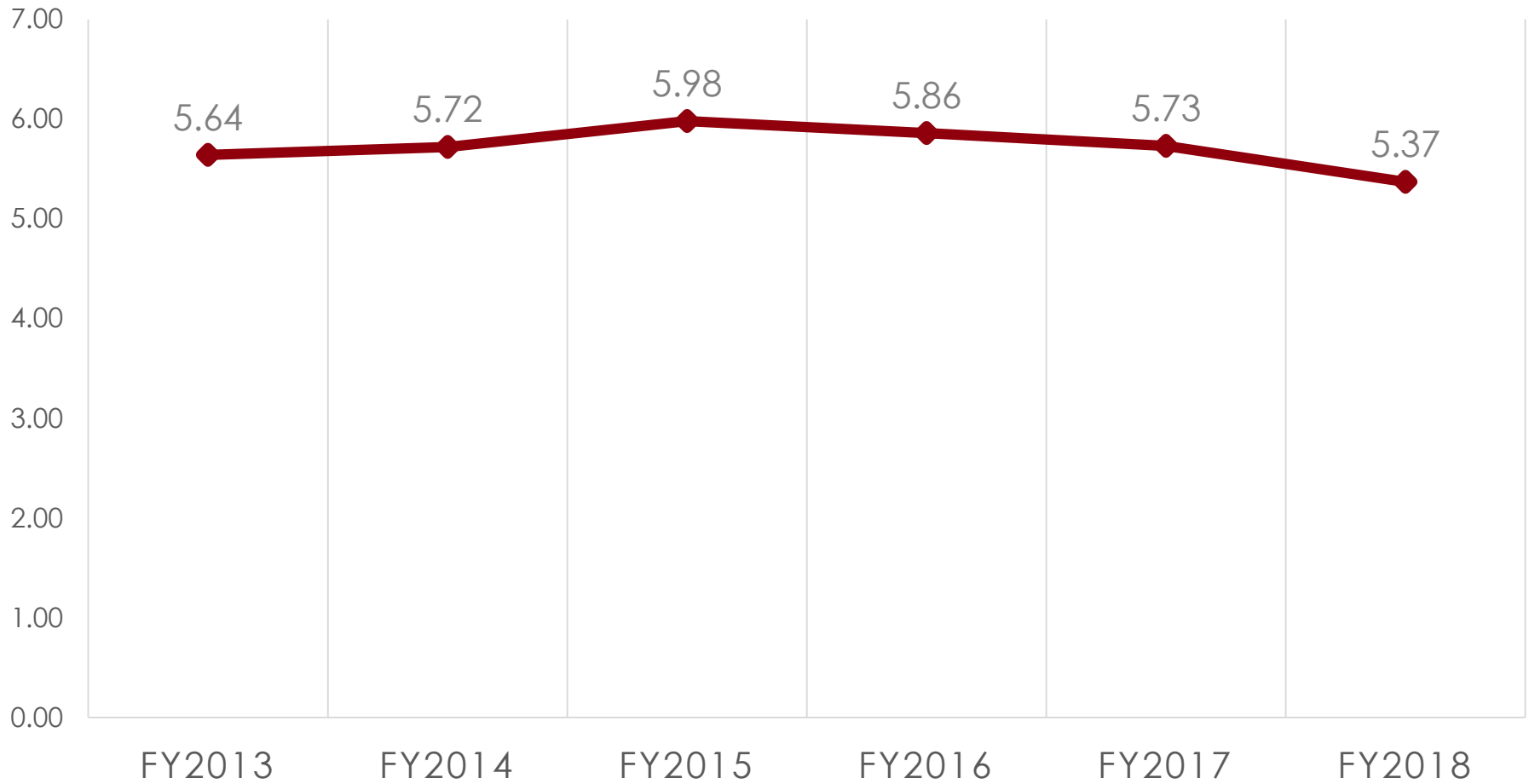
Quality/ Cleanliness- beach, ocean



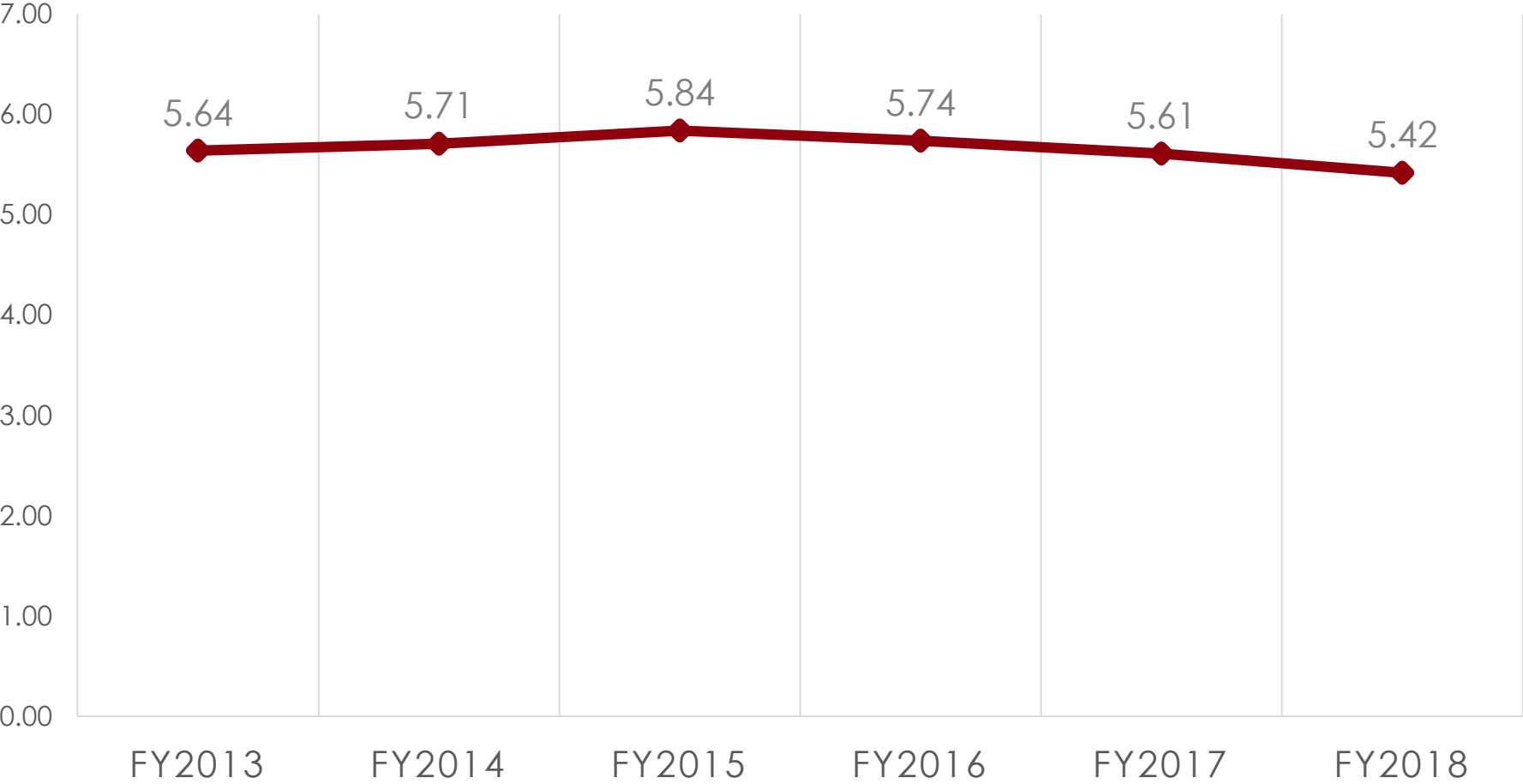
Quality/ Cleanliness- air, sky



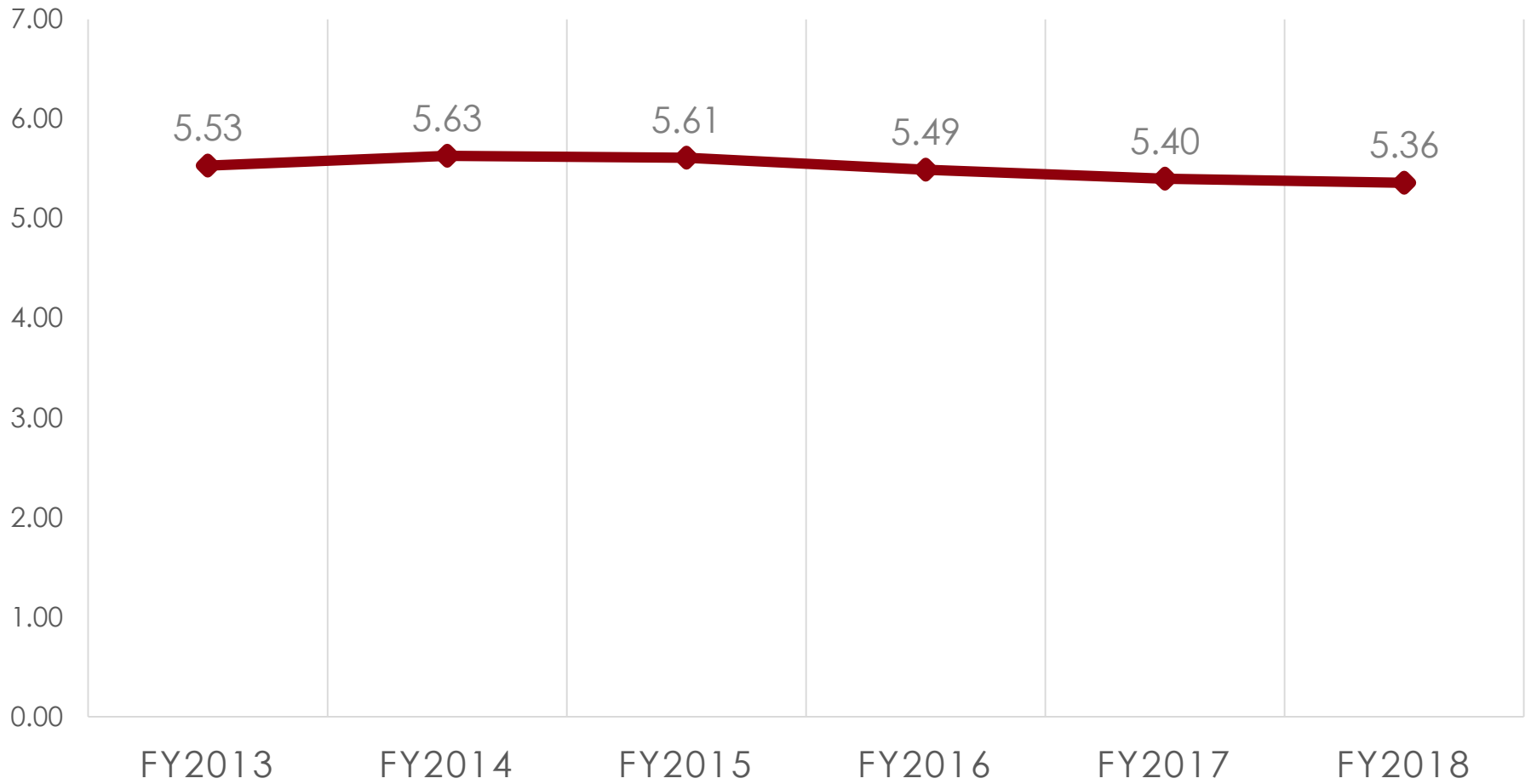
Quality/ Cleanliness- parks



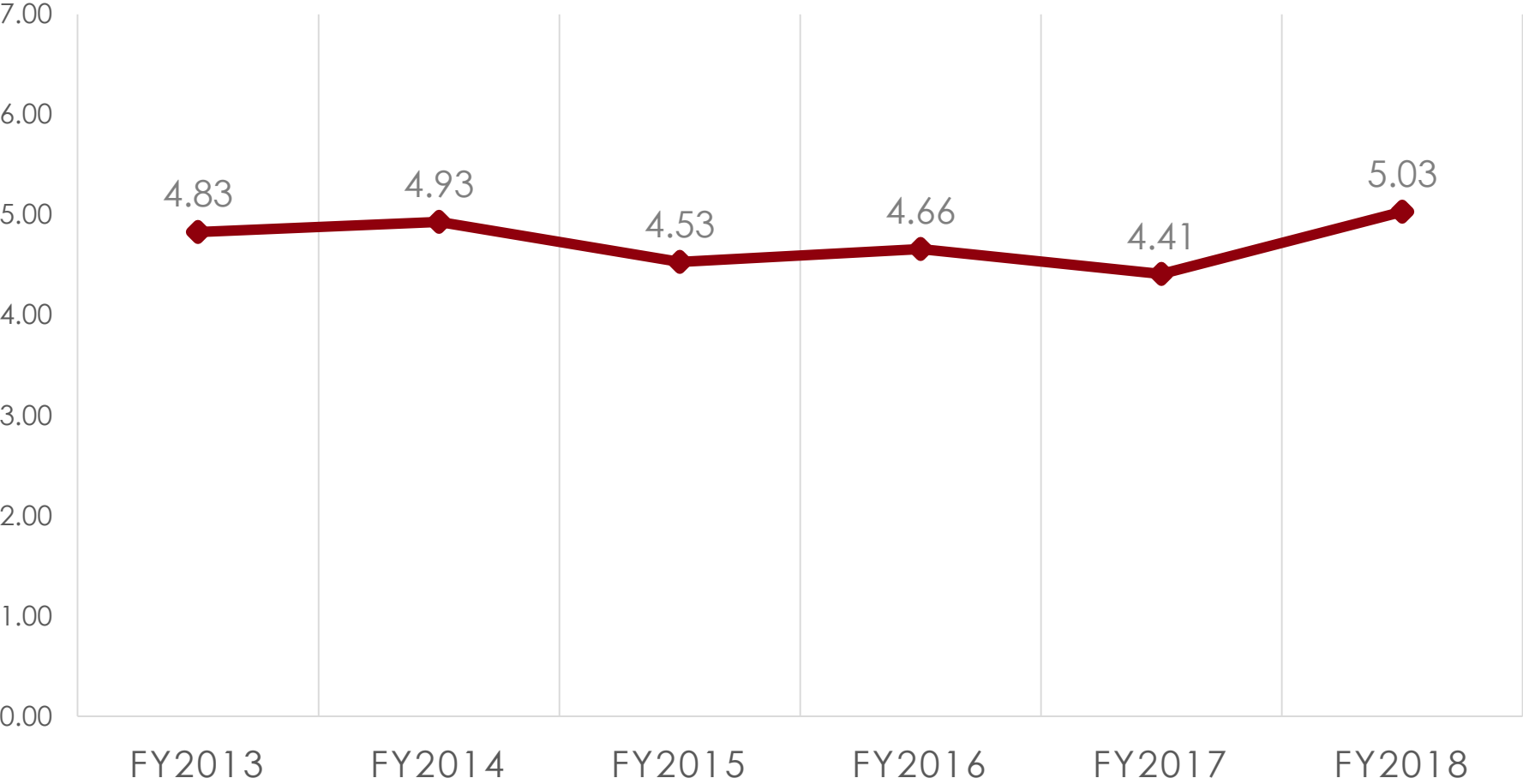
Quality- landscape Tumon



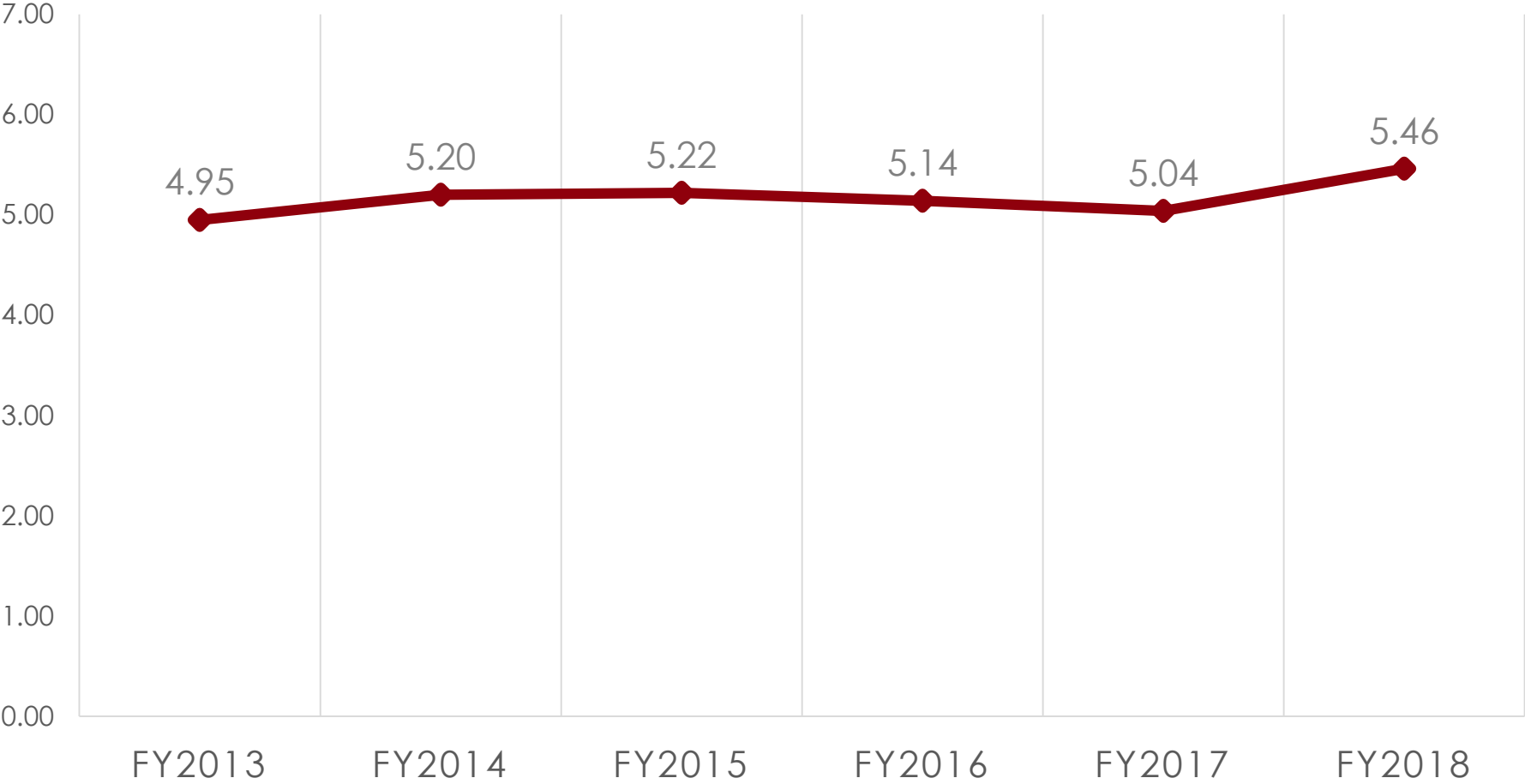
Quality- landscape Guam



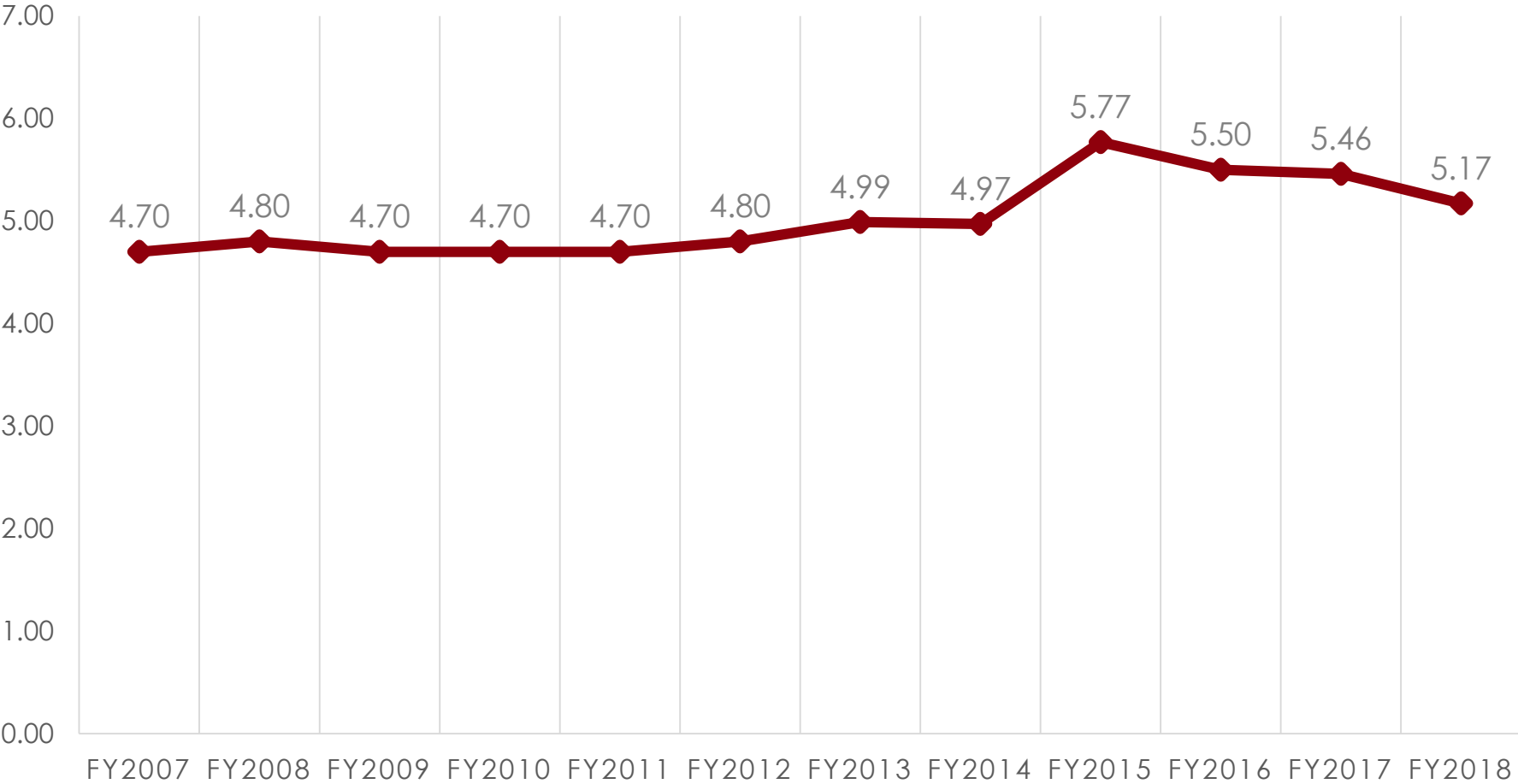
Quality- ground handler



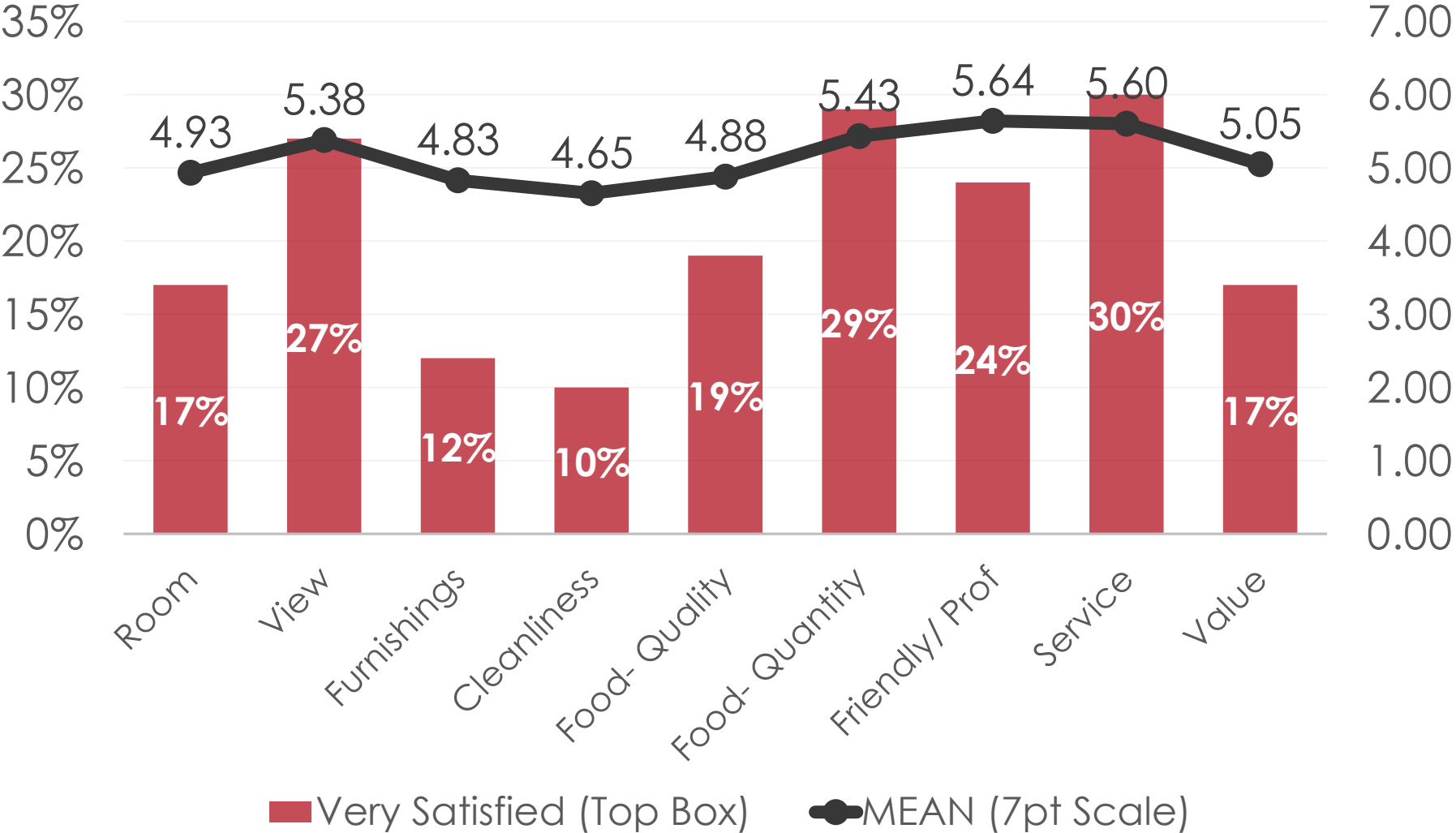
Quality/ Cleanliness- transportation vehicle



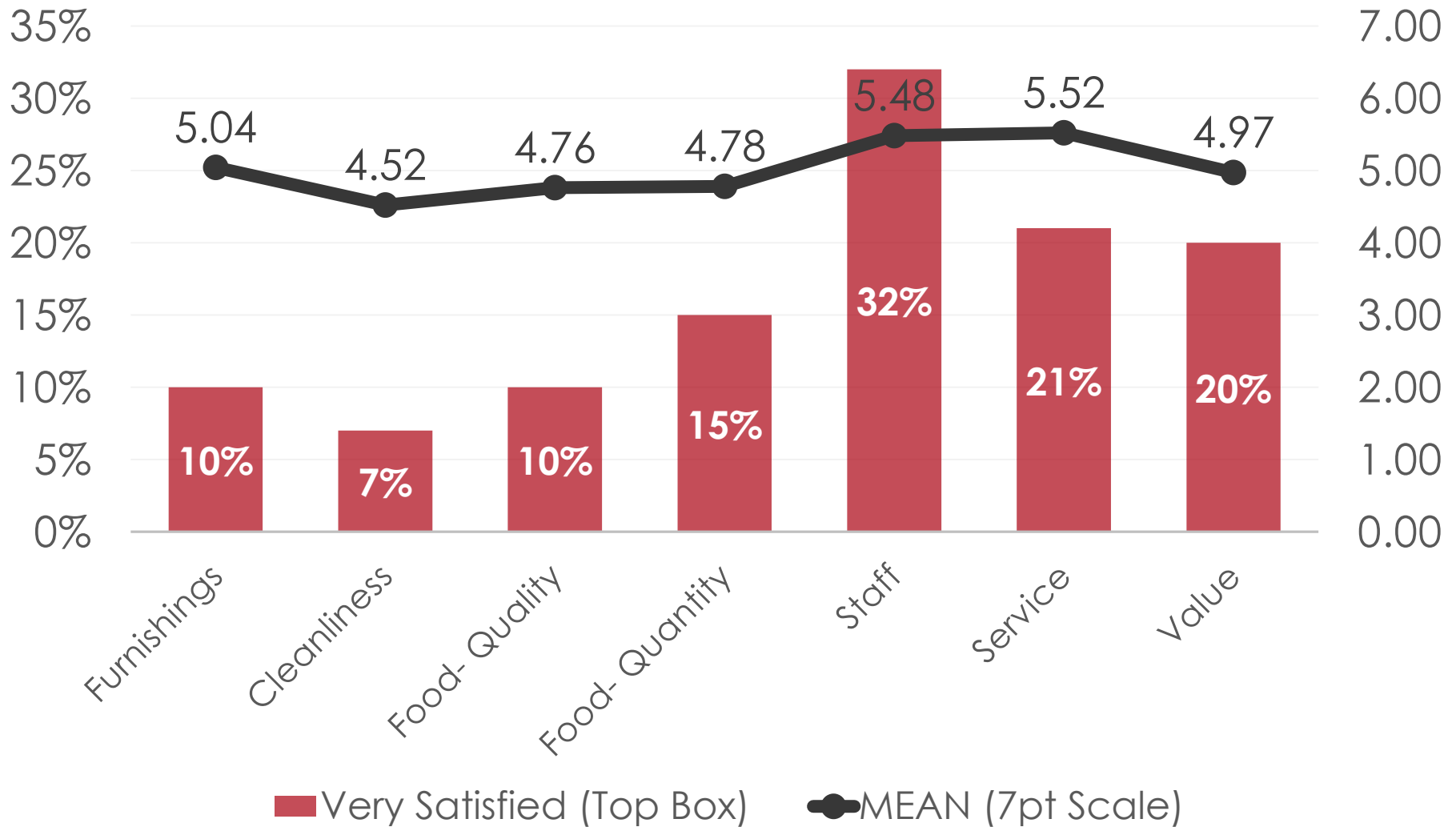
ACCOMMODATIONS OVERALL SATISFACTION



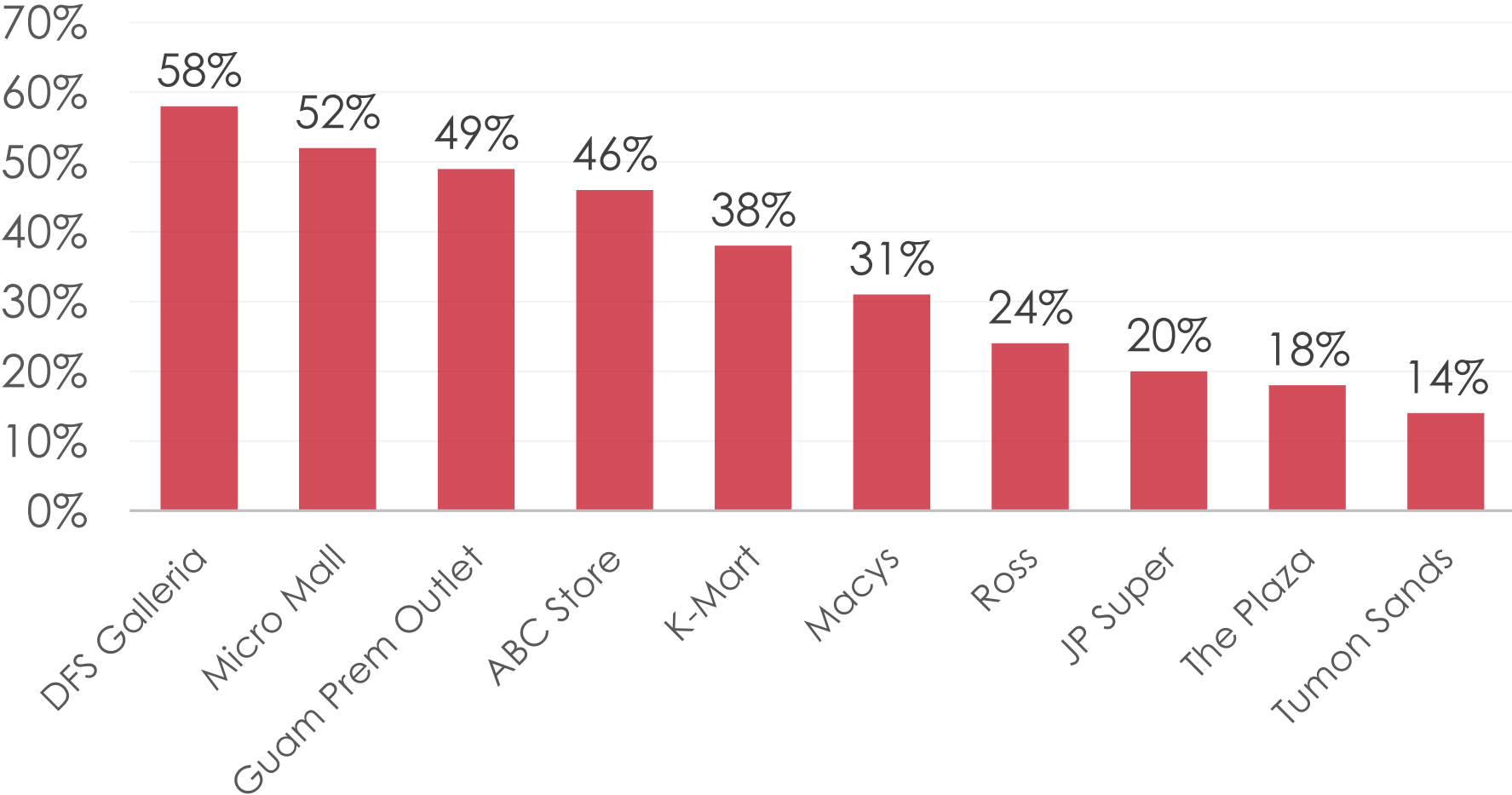
ACCOMMODATIONS – Satisfaction by Category



DINING EXPERIENCE (Outside Hotel) – Satisfaction by Category



Shopping Malls/ Stores (Top Responses)



Shopping Malls/ Stores (Top 3 Responses)

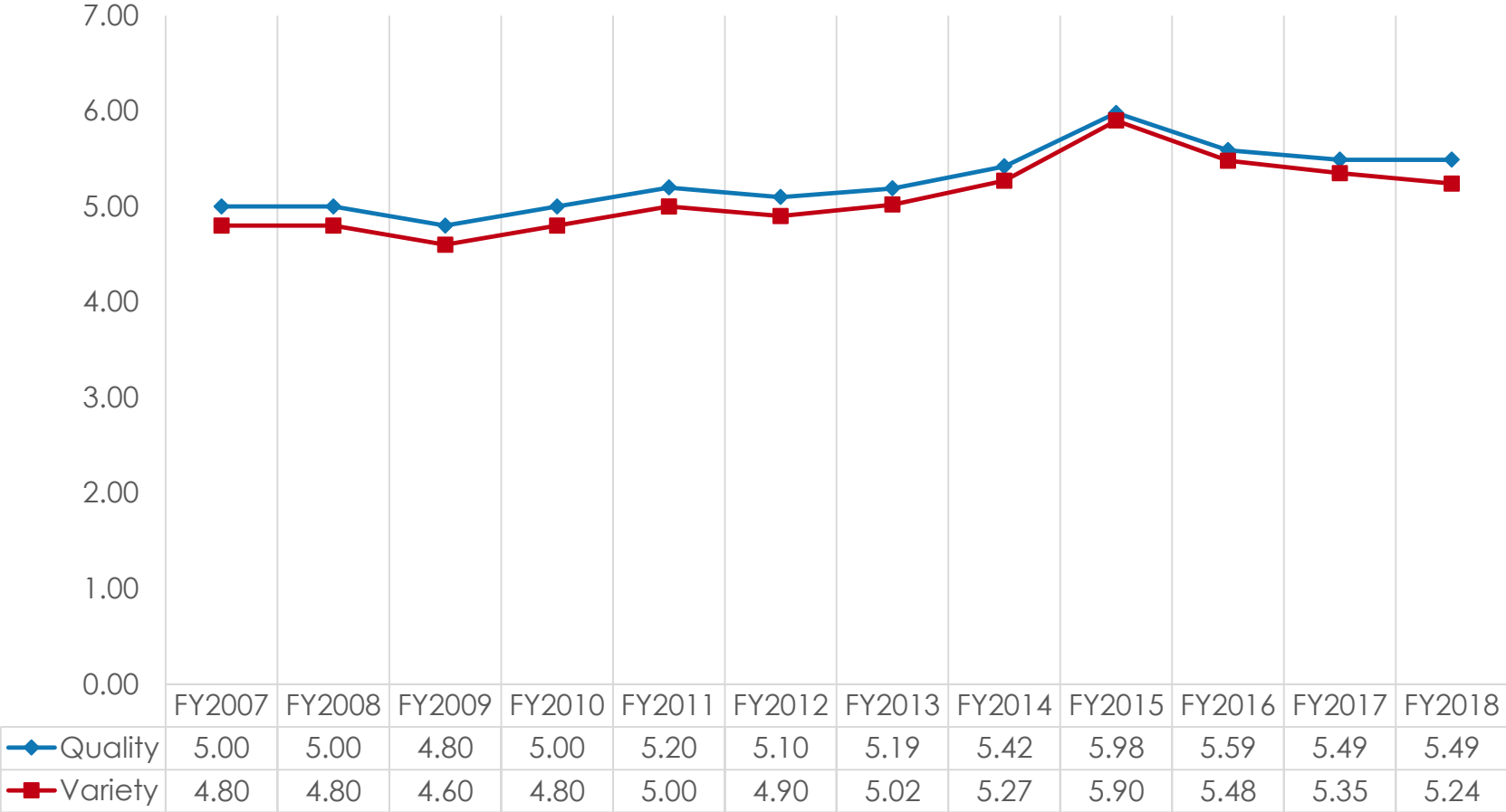
FY2018
58% DFS 52% Micronesian Mall 49% Premier Outlets

FY2017	FY2016	FY2015	FY2014
63% DFS 61% Premier Outlets 57% ABC Stores	68% DFS 66% ABC 67% K-Mart	77% K-Mart 69% DFS 63% Micronesian Mall	72% DFS 70% ABC 62% K-Mart

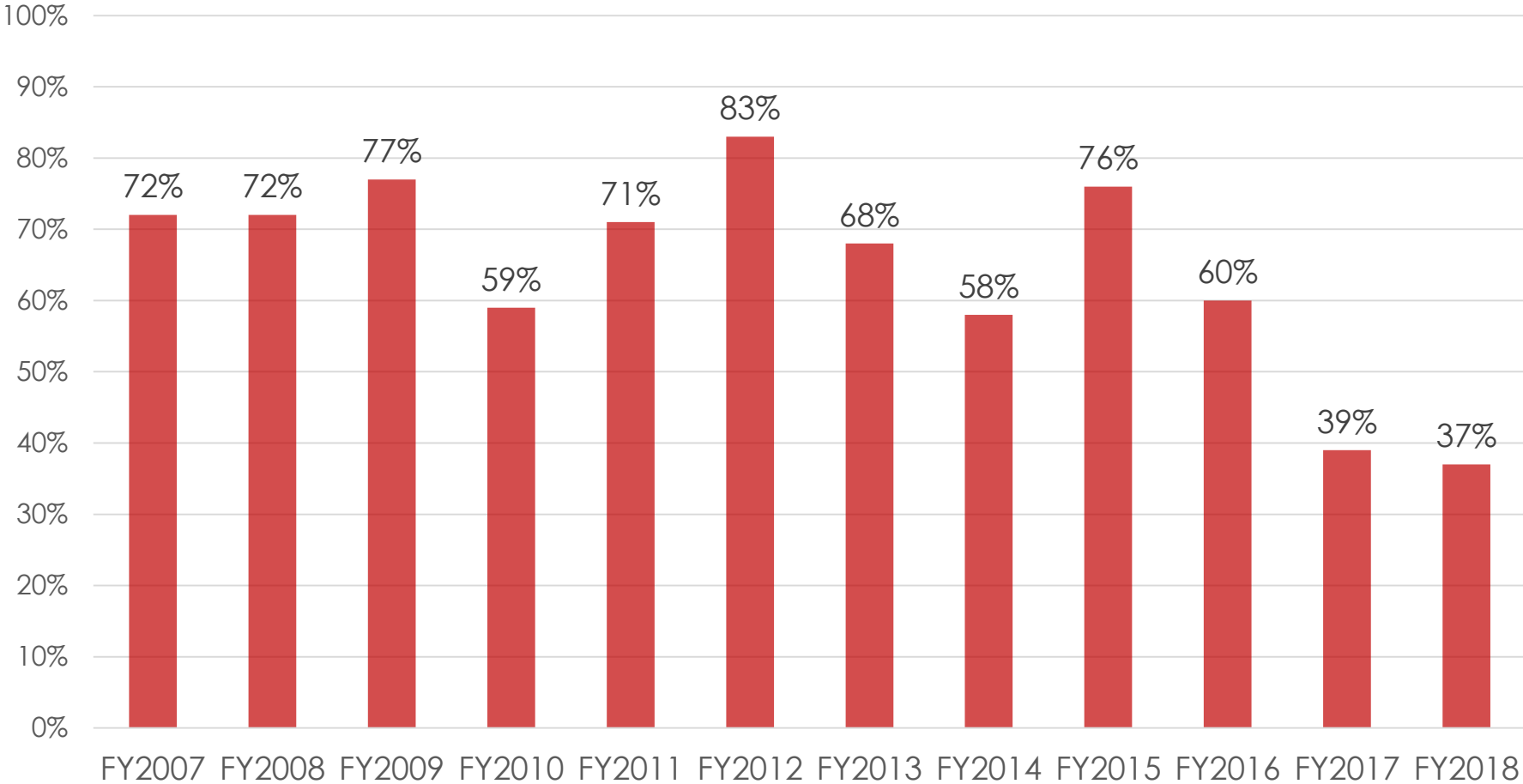
FY2013	FY2012	FY2011	FY2010
73% DFS 72% ABC 57% K-Mart	75% DFS 70% ABC 47% K-Mart	74% DFS 67% ABC 45% Micronesian Mall	73% DFS 65% ABC 41% K-Mart

FY2009	FY2008	FY2007
70% DFS 64% ABC 38% K-Mart	77% DFS 65% ABC 41% Micronesian Mall	73% DFS 59% ABC 35% K-Mart

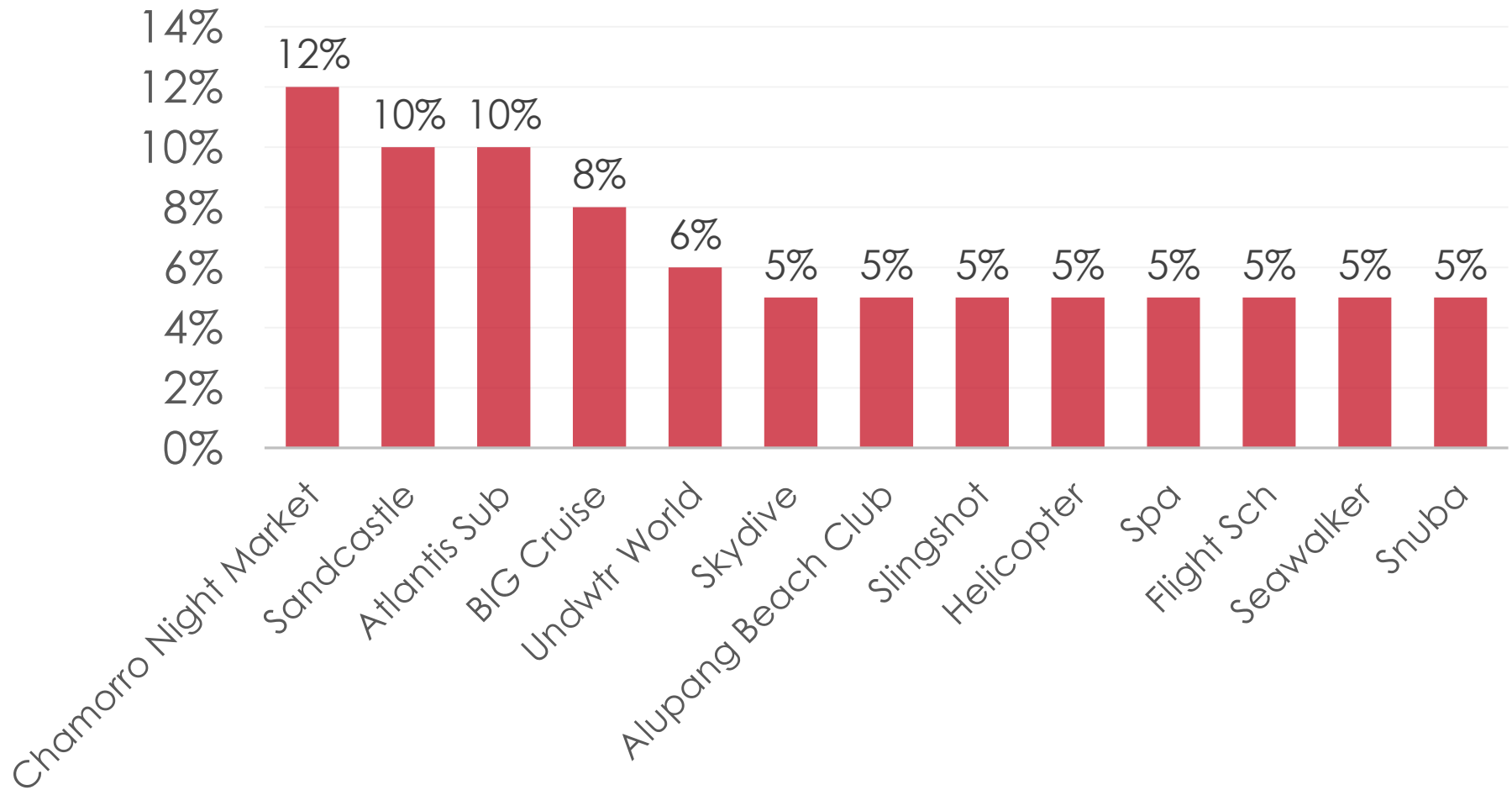
SHOPPING - SATISFACTION



OPTIONAL TOUR PARTICIPATION – Tracking

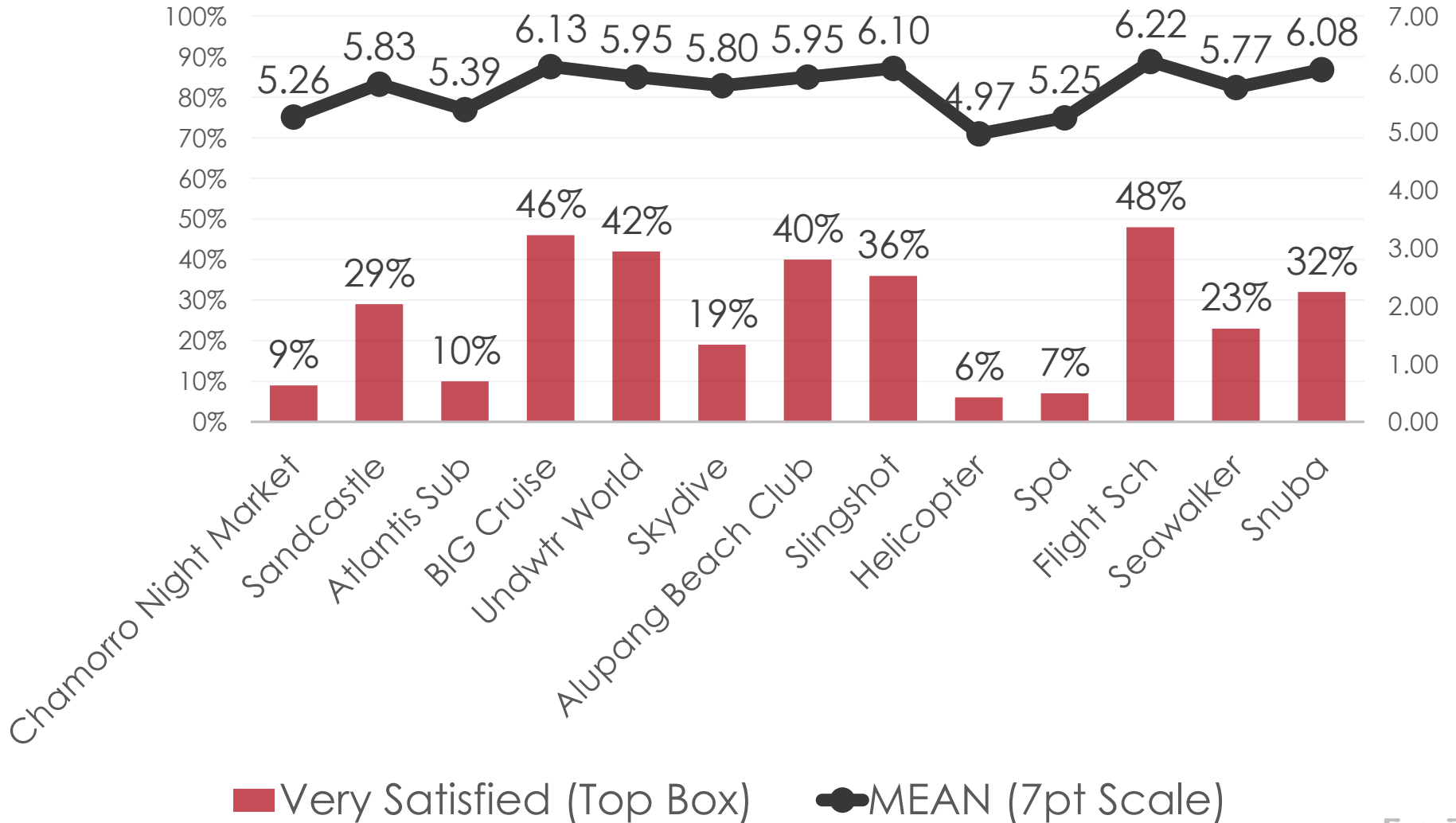


Optional Tour Participation (Top Responses 5%+) FY2018

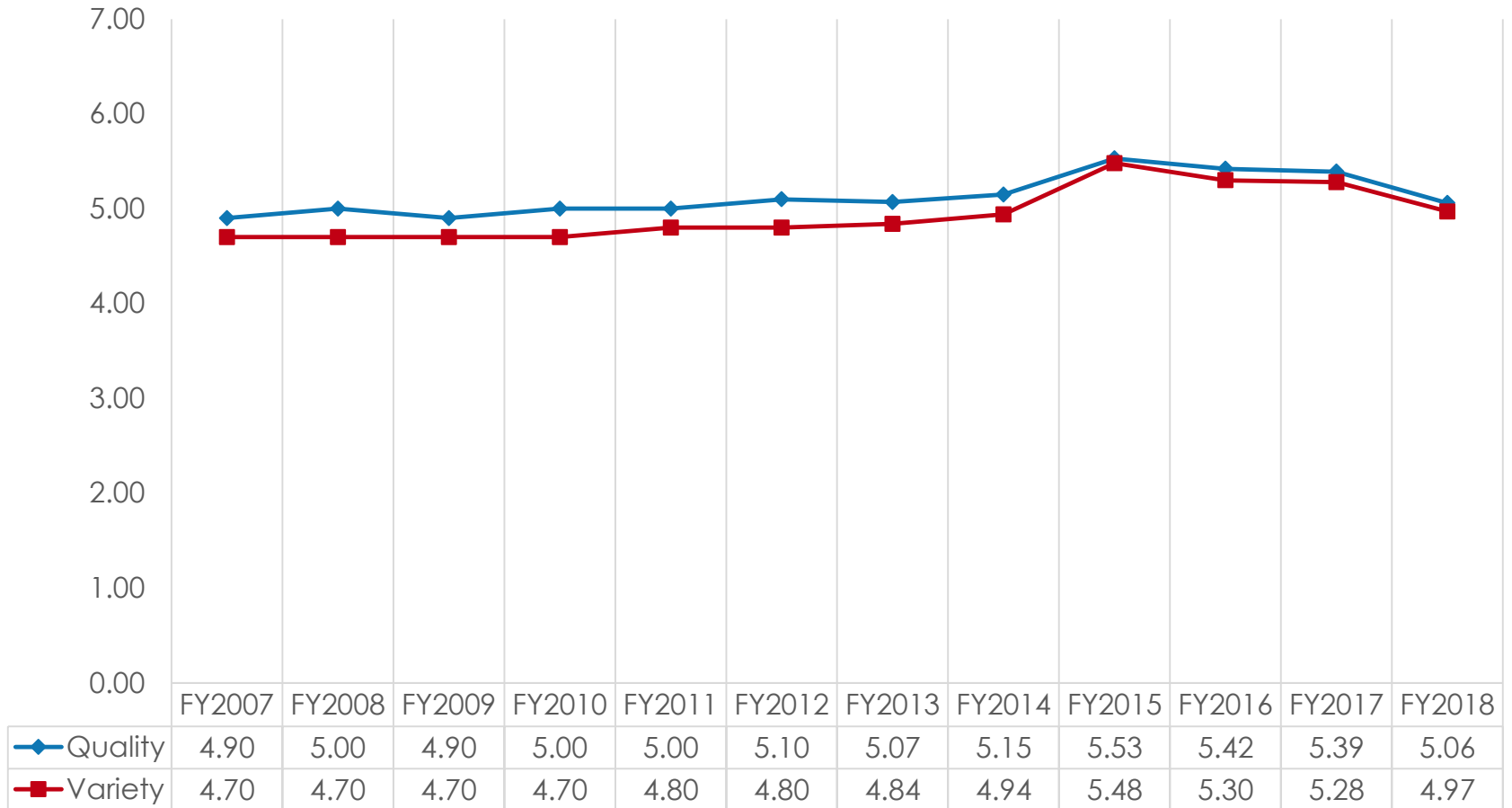


Optional Tour Satisfaction

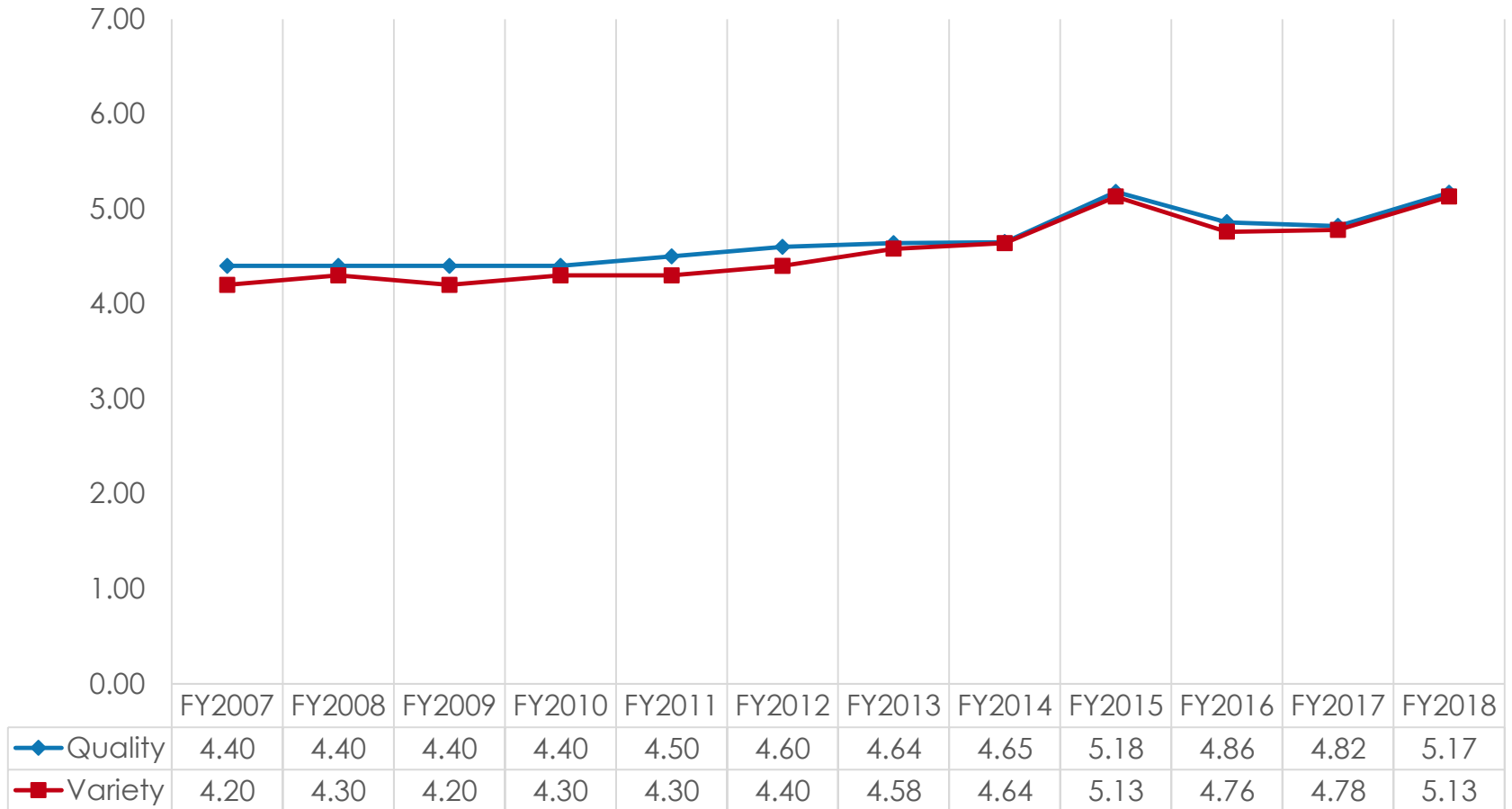
Top Responses only - Participation (5%+)



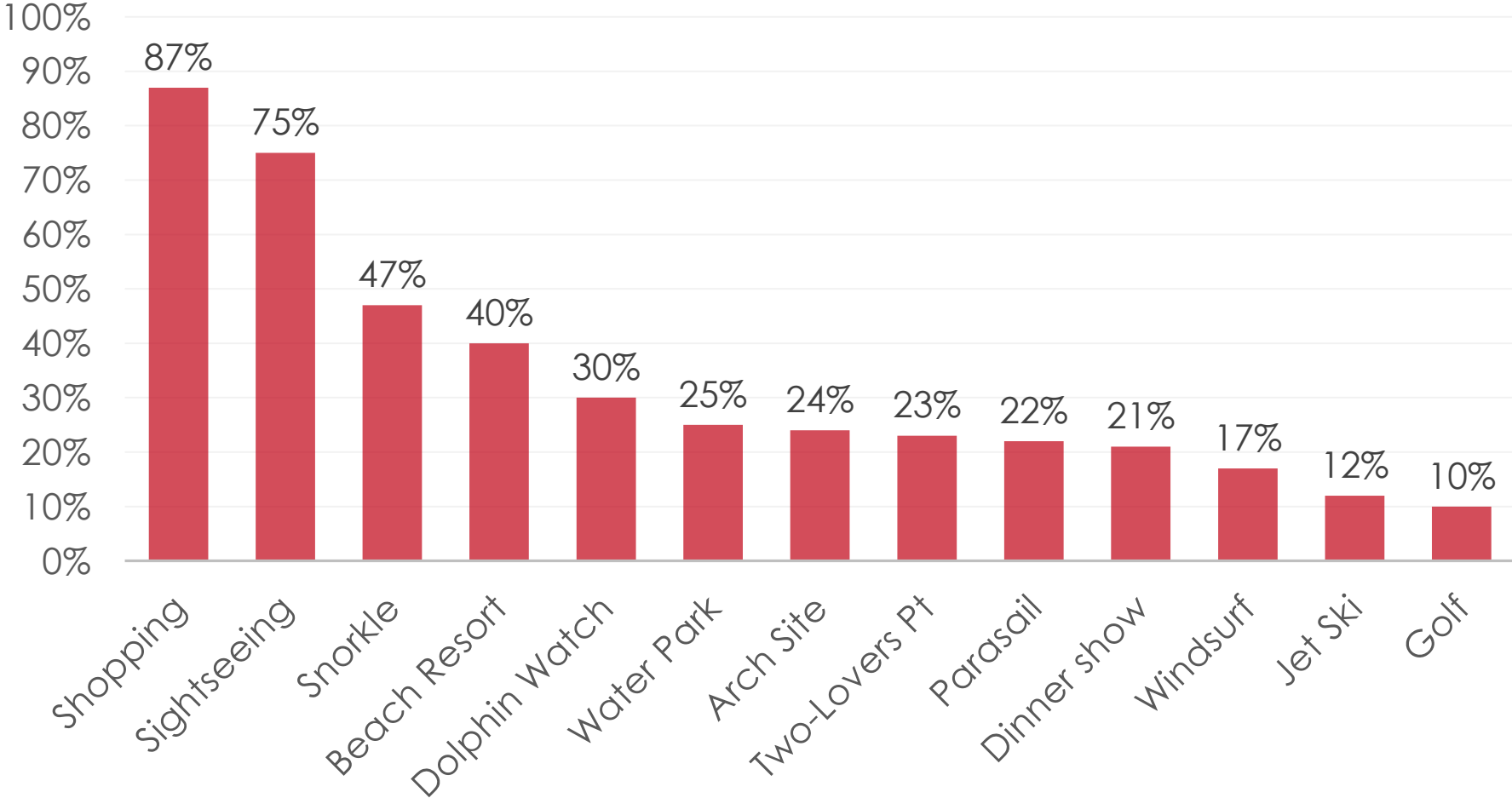
DAY TOUR - SATISFACTION



NIGHT TOUR - SATISFACTION

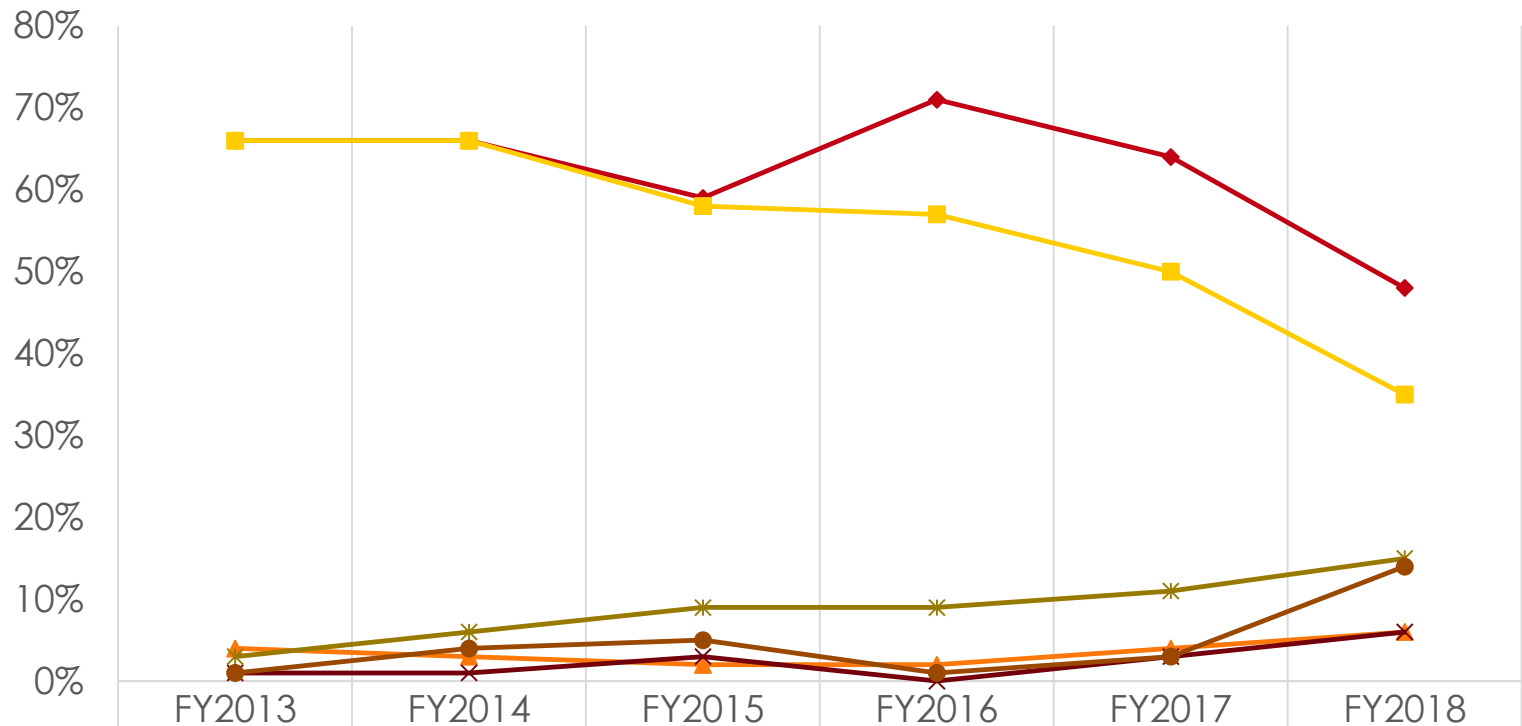


Activities Participation (Top Responses)



SECTION 5 PROMOTIONS

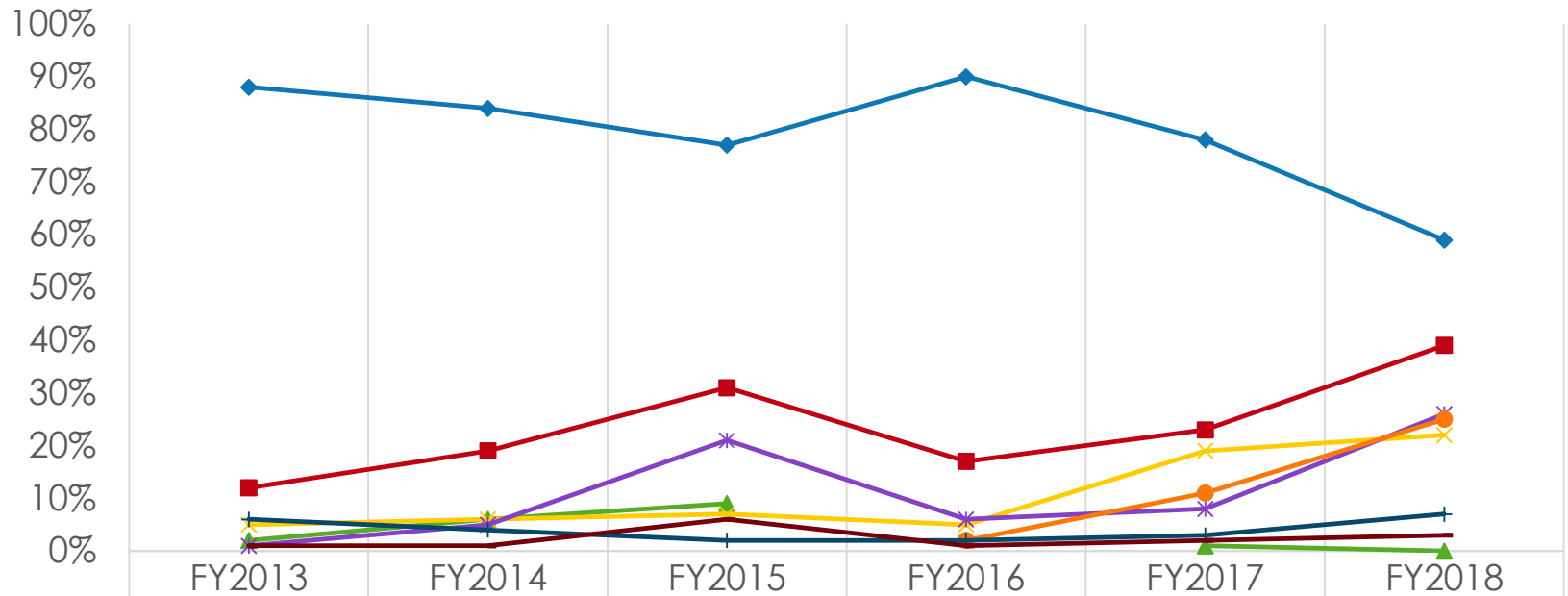
INTERNET- GUAM SOURCES OF INFORMATION



Search Engines	66%	66%	59%	71%	64%	48%
Blogs	66%	66%	58%	57%	50%	35%
None	4%	3%	2%	2%	4%	6%
Q&A sites	1%	1%	3%	0%	3%	6%
Social network	3%	6%	9%	9%	11%	15%
Forums	1%	4%	5%	1%	3%	14%

INTERNET- SOURCES OF INFORMATION

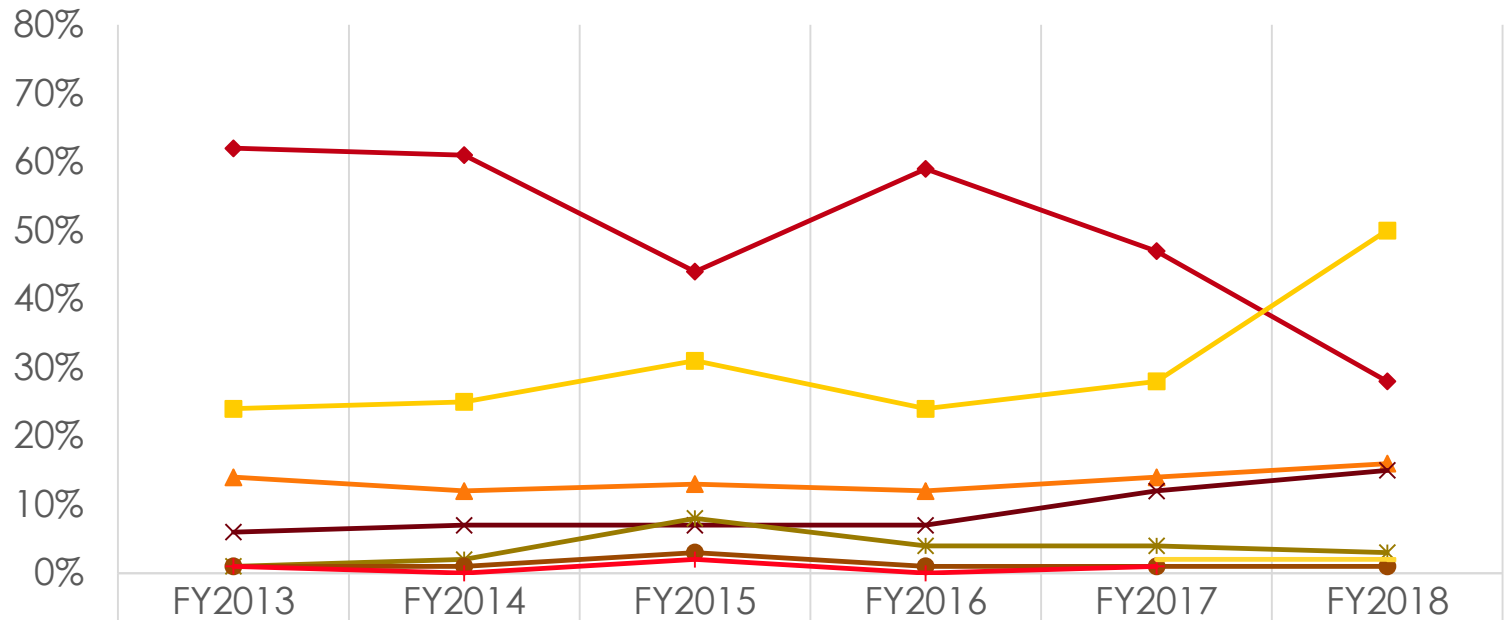
Things to do on Guam



◆ Naver	88%	84%	77%	90%	78%	59%
■ Google	12%	19%	31%	17%	23%	39%
▲ Yahoo	2%	6%	9%		1%	0%
✕ Daum	5%	6%	7%	5%	19%	22%
✱ Facebook	1%	5%	21%	6%	8%	26%
● Instagram				2%	11%	25%
⊕ None	6%	4%	2%	2%	3%	7%
— Twitter	1%	1%	6%	1%	2%	3%

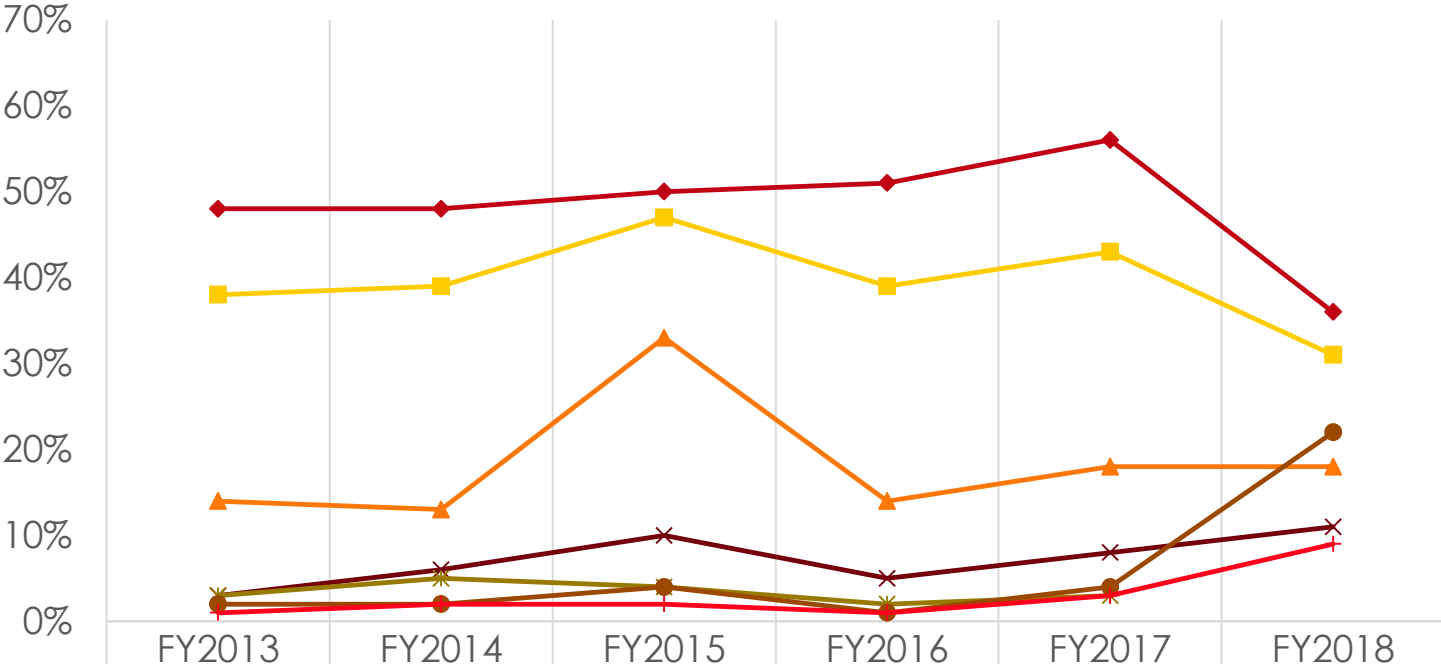
INTERNET- SOURCES OF INFORMATION

GVB



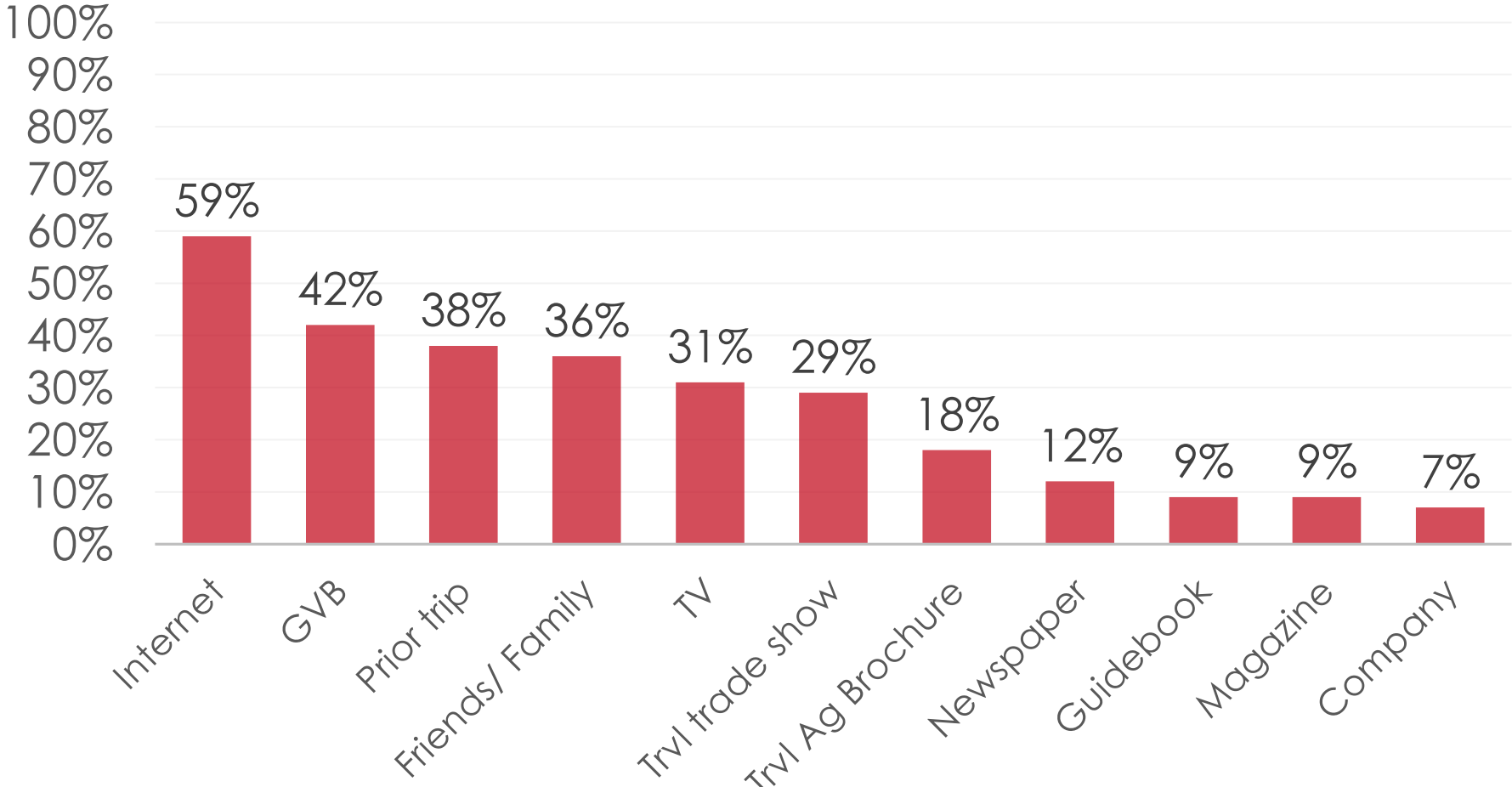
◆ None	62%	61%	44%	59%	47%	28%
■ GVB Website	24%	25%	31%	24%	28%	50%
▲ GVB Blog	14%	12%	13%	12%	14%	16%
× GVB Café	6%	7%	7%	7%	12%	15%
* GVB Facebook	1%	2%	8%	4%	4%	3%
● GVB Twitter	1%	1%	3%	1%	1%	1%
+ GVB Sina Weibo	1%	0%	2%	0%	1%	
— GVB Instagram					2%	2%

TRAVEL MOTIVATION



	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
◆ Friends/ Family	48%	48%	50%	51%	56%	36%
■ Internet	38%	39%	47%	39%	43%	31%
▲ Travel Agent	14%	13%	33%	14%	18%	18%
✕ Social media	3%	6%	10%	5%	8%	11%
* Company/ Bus Trip	3%	5%	4%	2%	3%	
● Magazine	2%	2%	4%	1%	4%	22%
+ Travel shows	1%	2%	2%	1%	3%	9%

PRE-ARRIVAL SOURCES OF INFORMATION

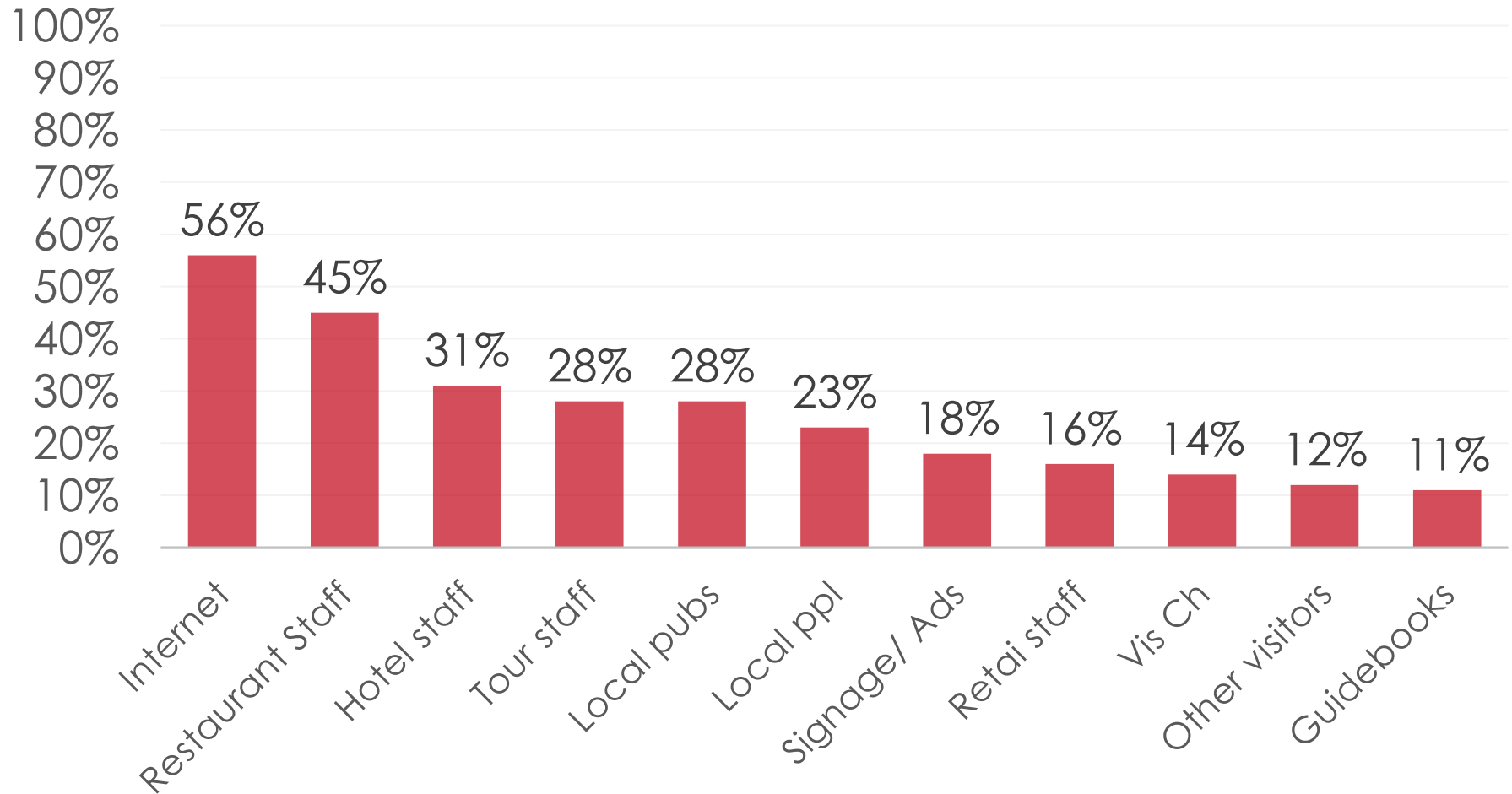


PRE-ARRIVAL SOURCES OF INFORMATION

FY2018	FY2017
59% Internet/ App 42% GVB 38% Prior trip	85% Internet/ App 57% Friend/ Relative 35% Travel Agent Brochure

ONISLE

SOURCES OF INFORMATION



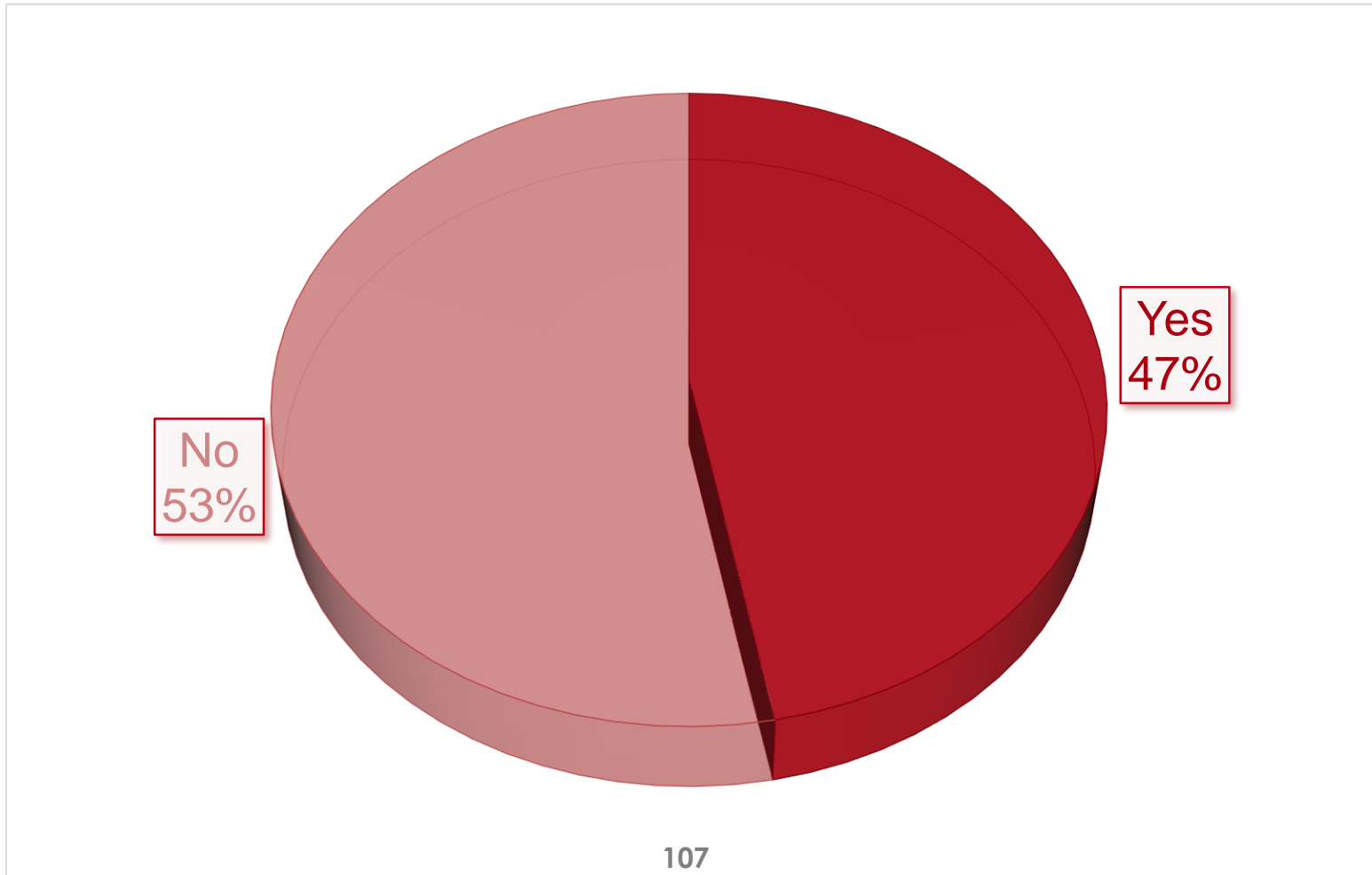
ON-ISLE SOURCES OF INFORMATION

FY2018	FY2017
56% Internet/ App 45% Restaurant staff 31% Hotel staff	52% Internet/ App 48% Hotel staff 42% Tour staff

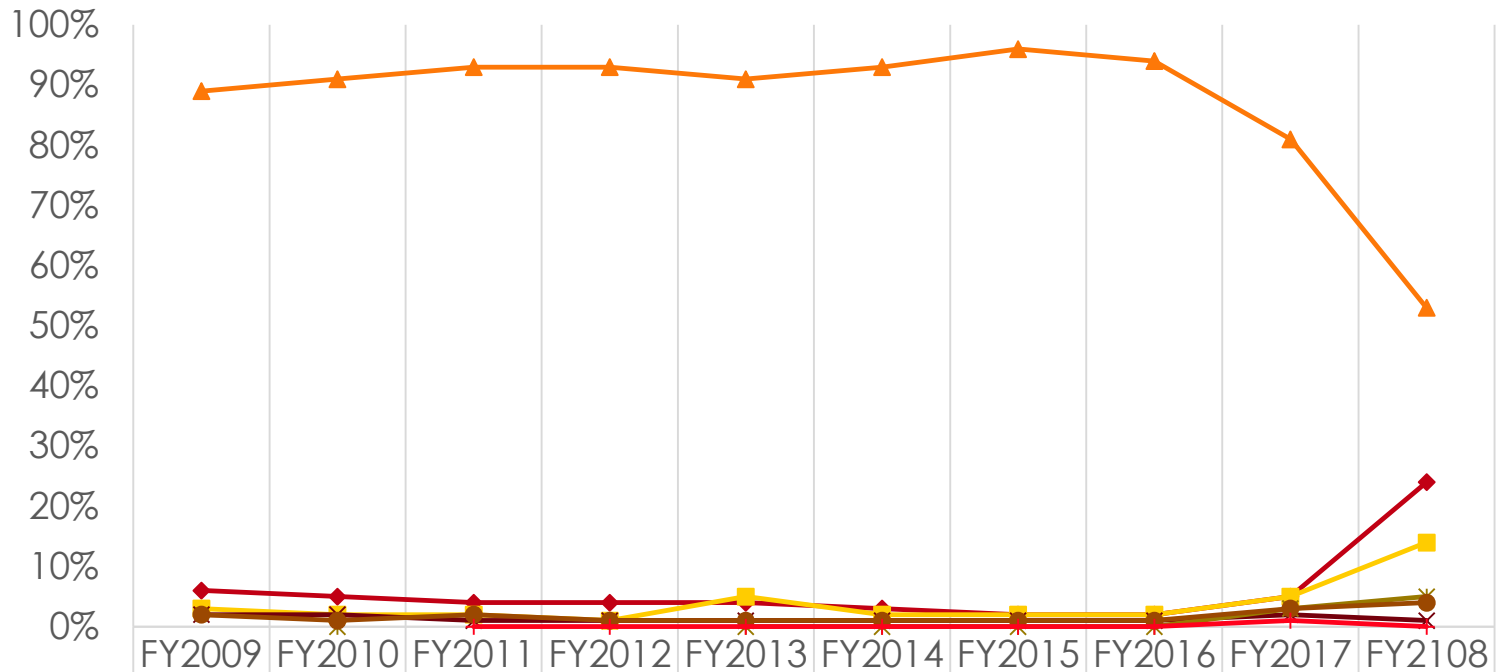
SECTION 6

FUTURE TRAVEL TO GUAM

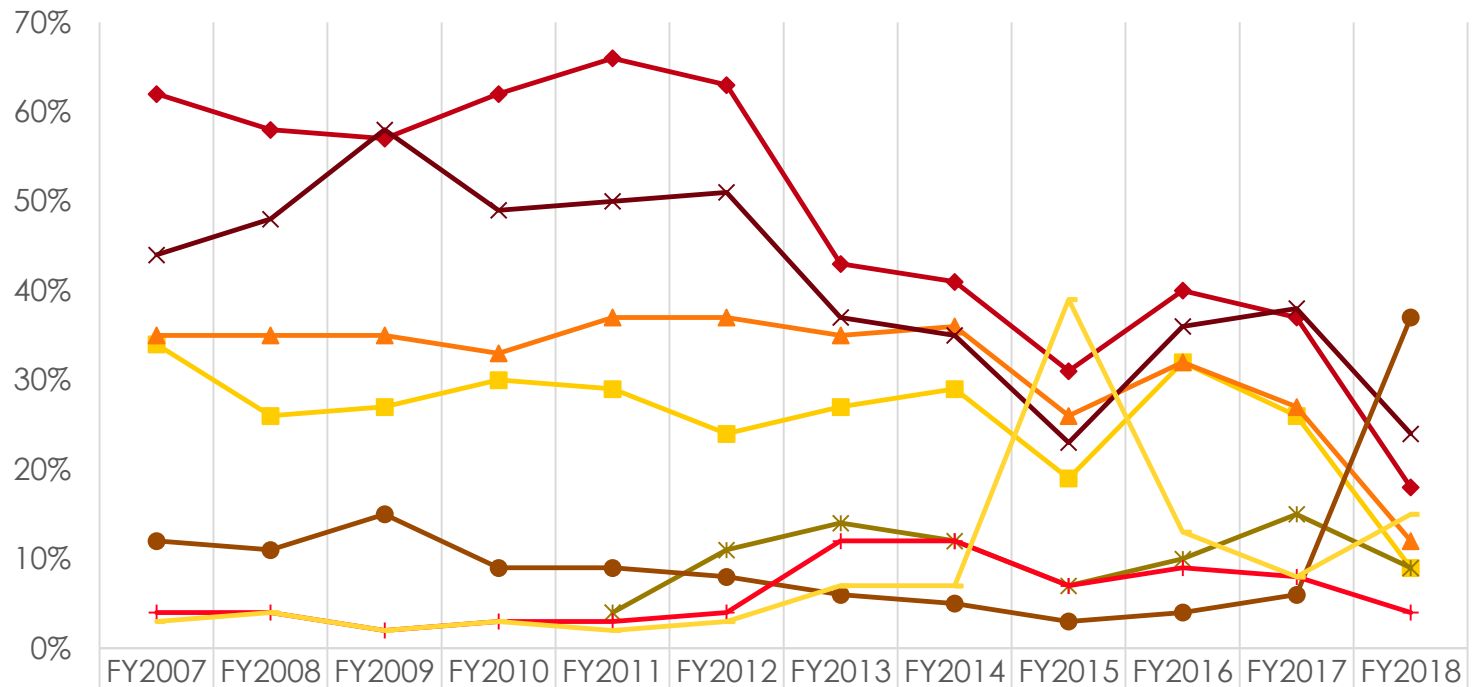
Will security screening/ immigration at Guam Airport impact future travel to Guam?



What would it take to make you stay an extra day on Guam?



FUTURE TRAVEL CONCERNS

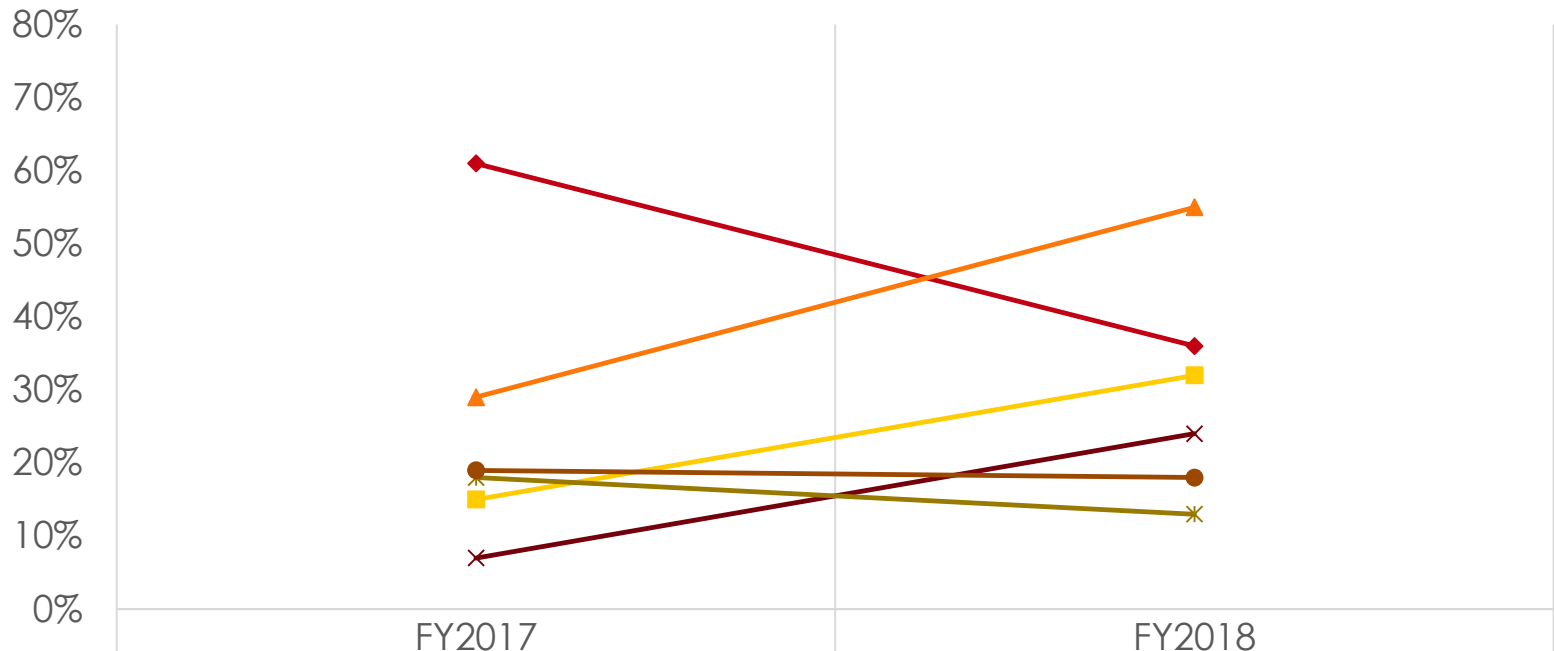


	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
◆ Safety	62%	58%	57%	62%	66%	63%	43%	41%	31%	40%	37%	18%
■ Terrorism	34%	26%	27%	30%	29%	24%	27%	29%	19%	32%	26%	9%
▲ Food	35%	35%	35%	33%	37%	37%	35%	36%	26%	32%	27%	12%
✕ Expense	44%	48%	58%	49%	50%	51%	37%	35%	23%	36%	38%	24%
* Discrimination					4%	11%	14%	12%	7%	10%	15%	9%
● Should spend at home	12%	11%	15%	9%	9%	8%	6%	5%	3%	4%	6%	37%
+ Don't know	4%	4%	2%	3%	3%	4%	12%	12%	7%	9%	8%	4%
— No concerns	3%	4%	2%	3%	2%	3%	7%	7%	39%	13%	8%	15%

SECTION 7

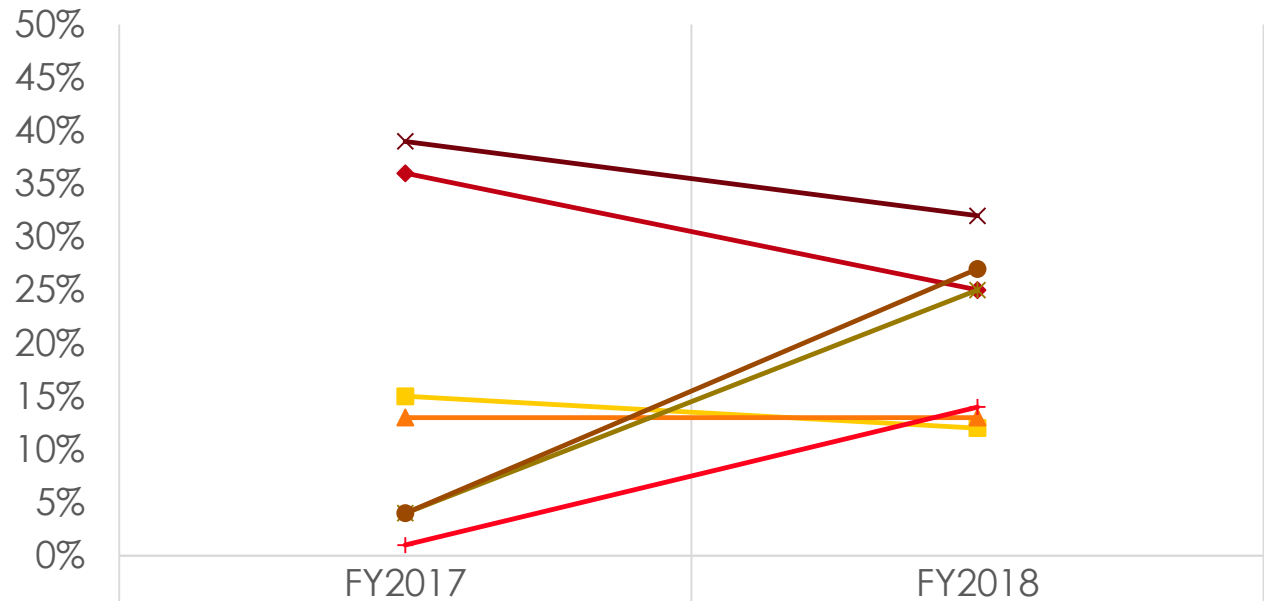
GUAM CULTURE

EXPERIENCED- CHAMORRO/ HAFSA ADAI SPIRIT



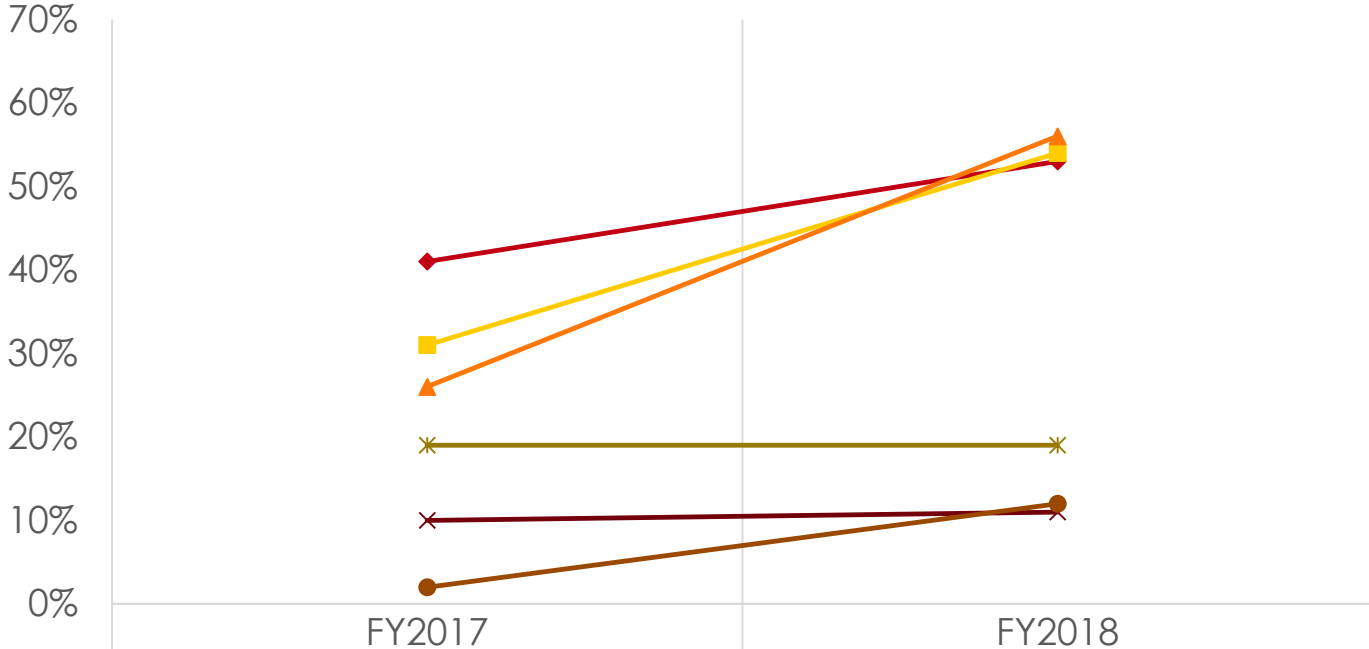
◆ Beaches	61%	36%
■ Local music	15%	32%
▲ Local people	29%	55%
✕ Night market	7%	24%
* None	18%	13%
● Local food	19%	18%

EXPERIENCED- OTHER CULTURAL ACTIVITY/EVENTS



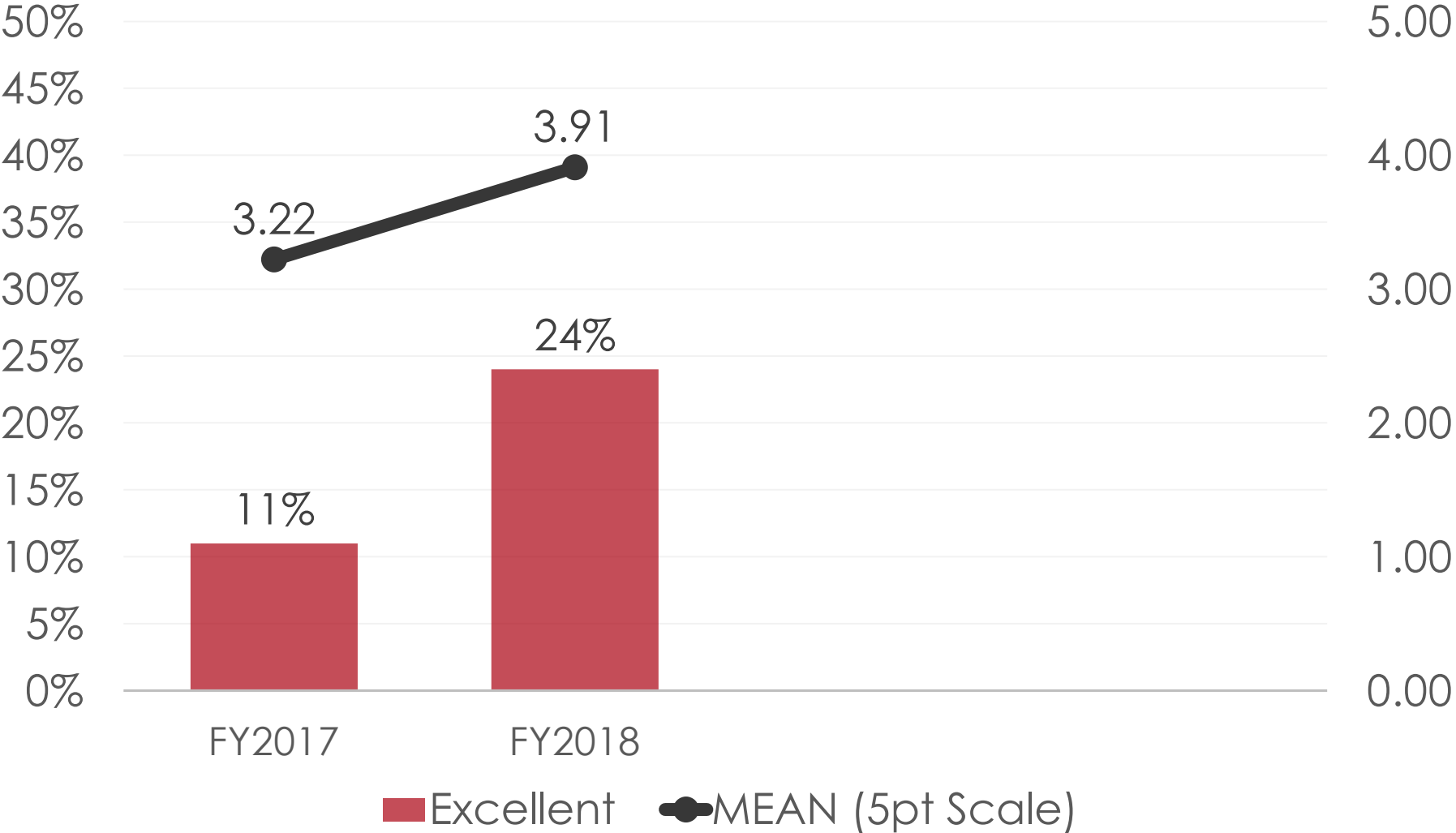
◆ 2-Lovers Pt	36%	25%
■ Chamorro Cult Entertainment	15%	12%
▲ Chamorro Village	13%	13%
× None	39%	32%
* Guam Museum	4%	25%
● Gef Pago	4%	27%
+ Sagan Kotturan	1%	14%

SOURCES OF INFORMATION- CULTURAL ACTIVITY/EVENTS

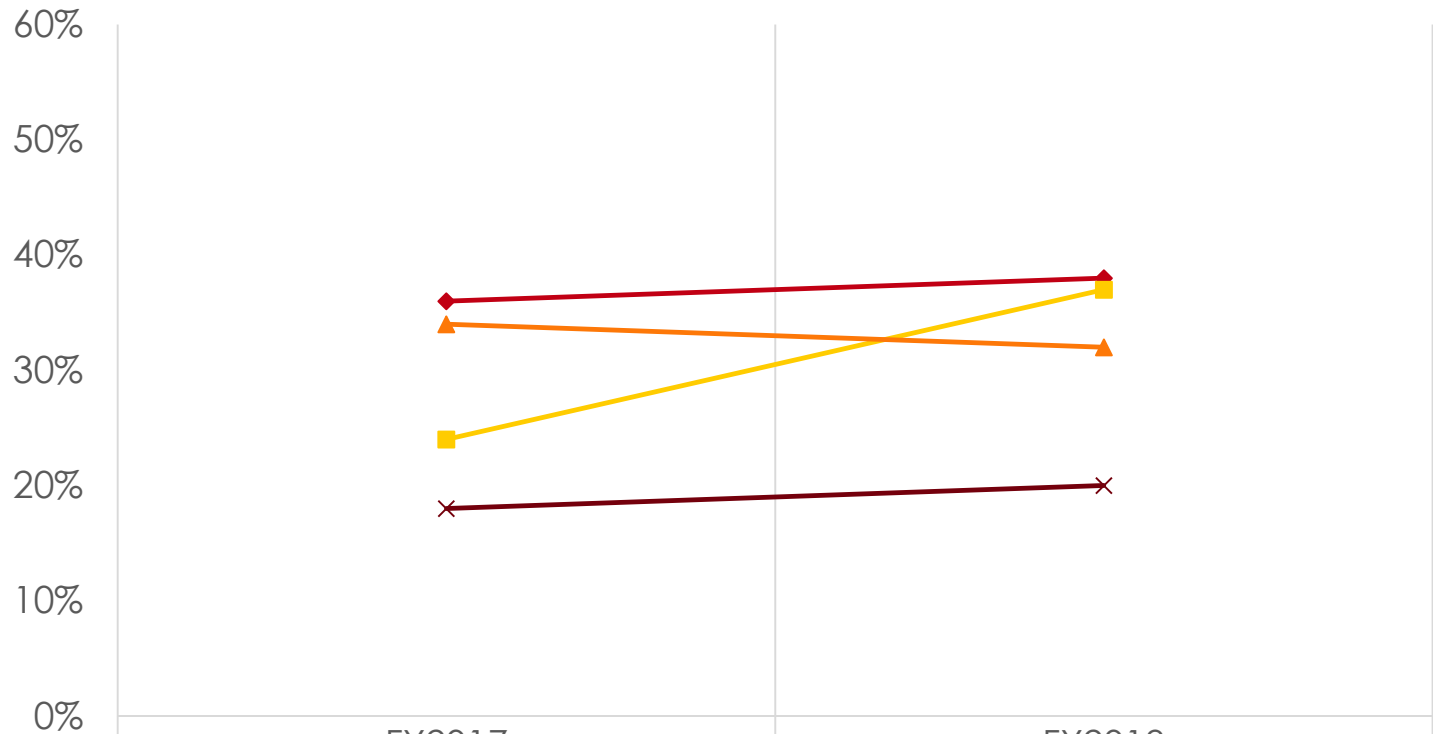


◆ Internet	41%	53%
■ Travel agency	31%	54%
▲ Guides/ Brochures	26%	56%
× Family/ friends	10%	11%
* Hotel staff	19%	19%
● Newspaper/ Magazine	2%	12%

SATISFACTION- CULTURAL ACTIVITY/EVENTS



OBSTACLES- CULTURAL ACTIVITY/EVENTS



◆ Scheduling	36%	38%
■ Did not know where	24%	37%
▲ Unaware	34%	32%
✕ Did not want to	18%	20%

SECTION 8

ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers of Overall Satisfaction

Comparison of Drivers of Overall Satisfaction, Annual 2018	
	Annual 2018 rank
Drivers:	
Quality & Cleanliness of beaches & parks	1
Ease of getting around	
Safety walking around at night	8
Quality of daytime tours	4
Variety of daytime tours	11
Quality of nighttime tours	9
Variety of nighttime tours	6
Quality of shopping	
Variety of shopping	7
Price of things on Guam	
Quality of hotel accommodations	10
Quality/cleanliness of air, sky	3
Quality/cleanliness of parks	
Quality of landscape in Tumon	
Quality of landscape in Guam	2
Quality of ground handler	5
Quality/cleanliness of transportation vehicles	
% of Per Person On Island Expenditures Accounted For	35.9%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by eleven significant factors in the FY2018 Period. By rank order they are:
 - **Quality & cleanliness of beaches & parks,**
 - **Quality of landscape in Guam,**
 - **Quality/cleanliness of air, sky,**
 - **Quality of day time tours,**
 - **Quality of ground handler,**
 - **Variety of night time tours,**
 - **Variety of shopping,**
 - **Safety walking around at night,**
 - **Quality of night time tours,**
 - **Quality of hotel accommodations, and**
 - **Variety of day time tours .**
- With all eleven factors the overall r^2 is .359 meaning that **35.9% of overall satisfaction is accounted for by these factors.**

Drivers of On-isle Expenditures

Comparison of Drivers of Per Person On-Island Expenditures, Annual 2018	
	Annual 2018 rank
Drivers:	
Quality & Cleanliness of beaches & parks	1
Ease of getting around	
Safety walking around at night	7
Quality of daytime tours	3
Variety of daytime tours	
Quality of nighttime tours	4
Variety of nighttime tours	2
Quality of shopping	
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	5
Quality/cleanliness of air, sky	6
Quality/cleanliness of parks	
Quality of landscape in Tumon	9
Quality of landscape in Guam	
Quality of ground handler	
Quality/cleanliness of transportation vehicles	8
% of Per Person On Island Expenditures Accounted For	10.5%
NOTE: Only significant drivers are included.	

Drivers of On Isle Expenditures

- **Per Person On Isle Expenditures** of Korean visitor's on Guam is driven by eight significant factors in the 2018 Period. By rank order they are:
 - **Quality & cleanliness of beaches & parks,**
 - **Variety of night time tours,**
 - **Quality of day time tours,**
 - **Quality of night time tours,**
 - **Quality of hotel accommodations,**
 - **Quality/cleanliness of air/sky,**
 - **Safety walking around at night,**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality of landscape in Tumon.**
- With these factors, the overall r^2 is .105 meaning that **10.5% of per person on island expenditure is accounted for by these factors.**