



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **FY2016**

### **AUGUST 2016**



**Prepared by: QMark Research**

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# Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **354** 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 **354** is +/- 5.23 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 +/- 5.23 percentage points.

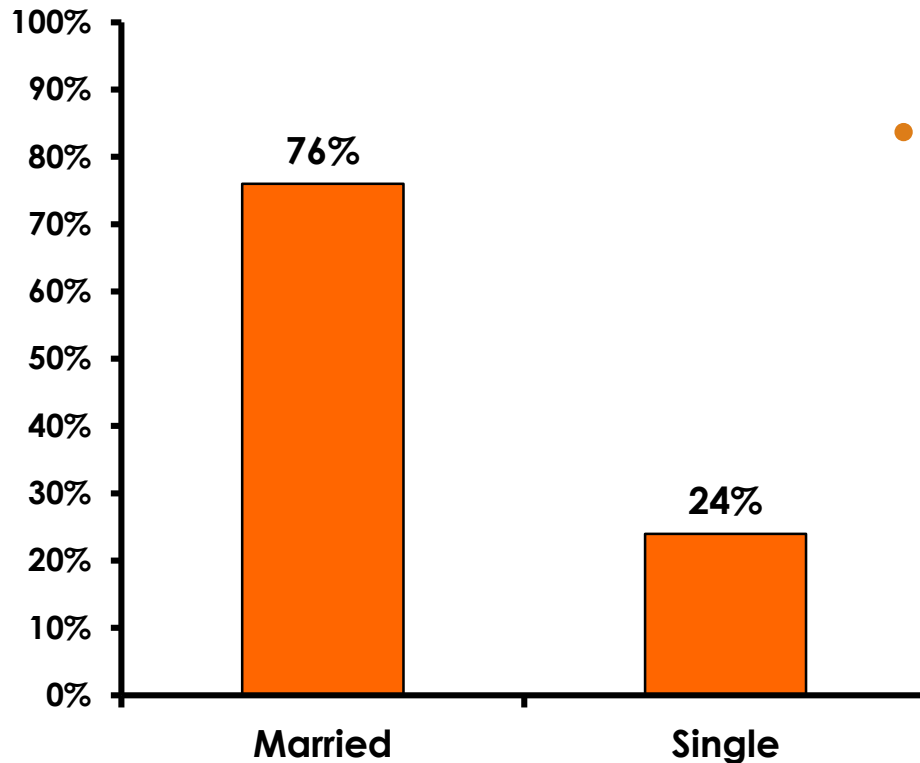
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# OBJECTIVES

- To monitor the effectiveness of the Korean 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.

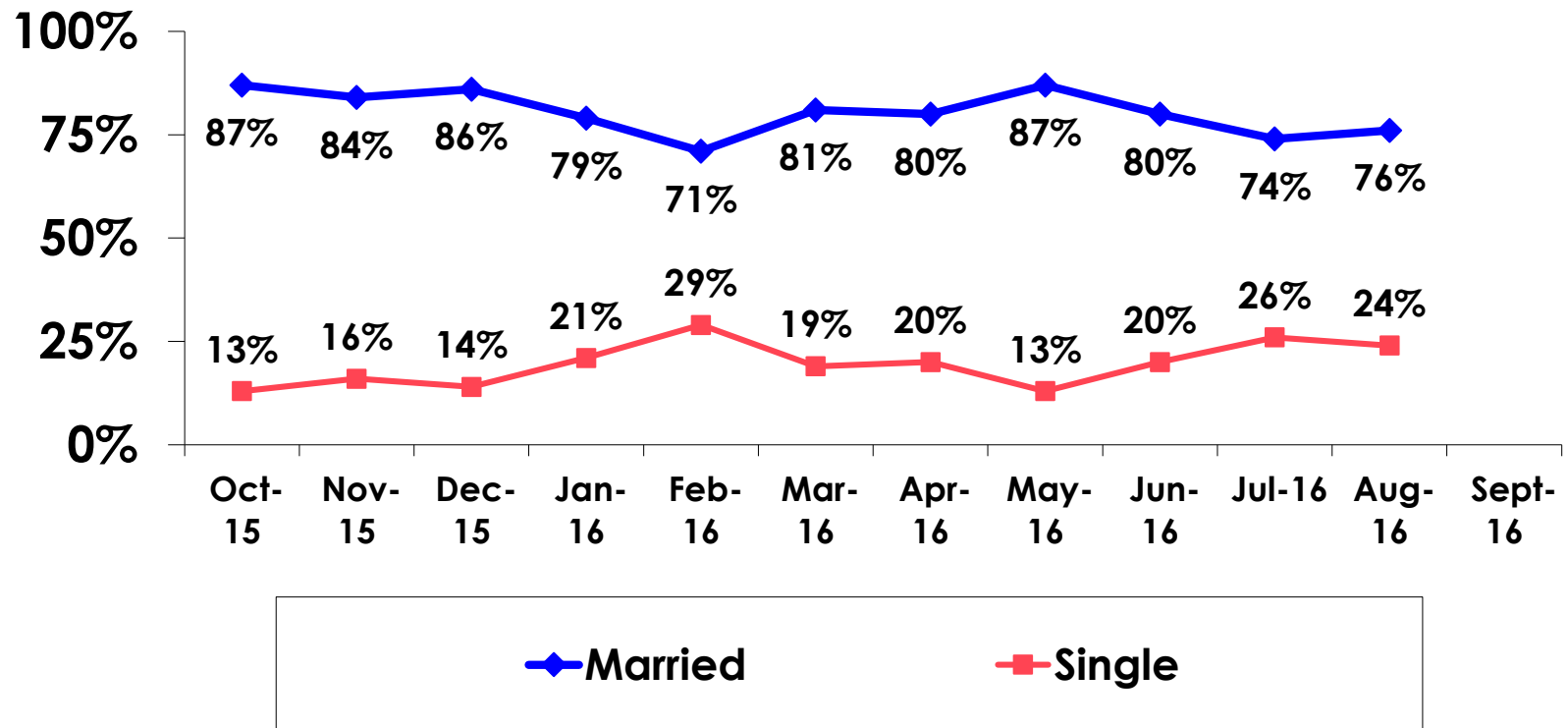
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

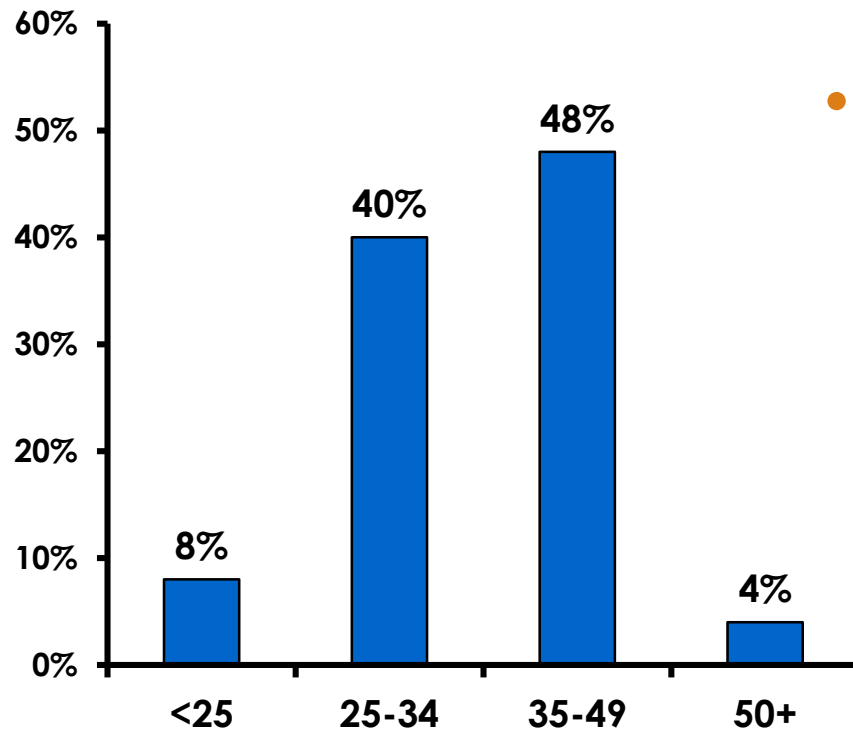


- Majority of Korean visitors are married.

# MARITAL STATUS

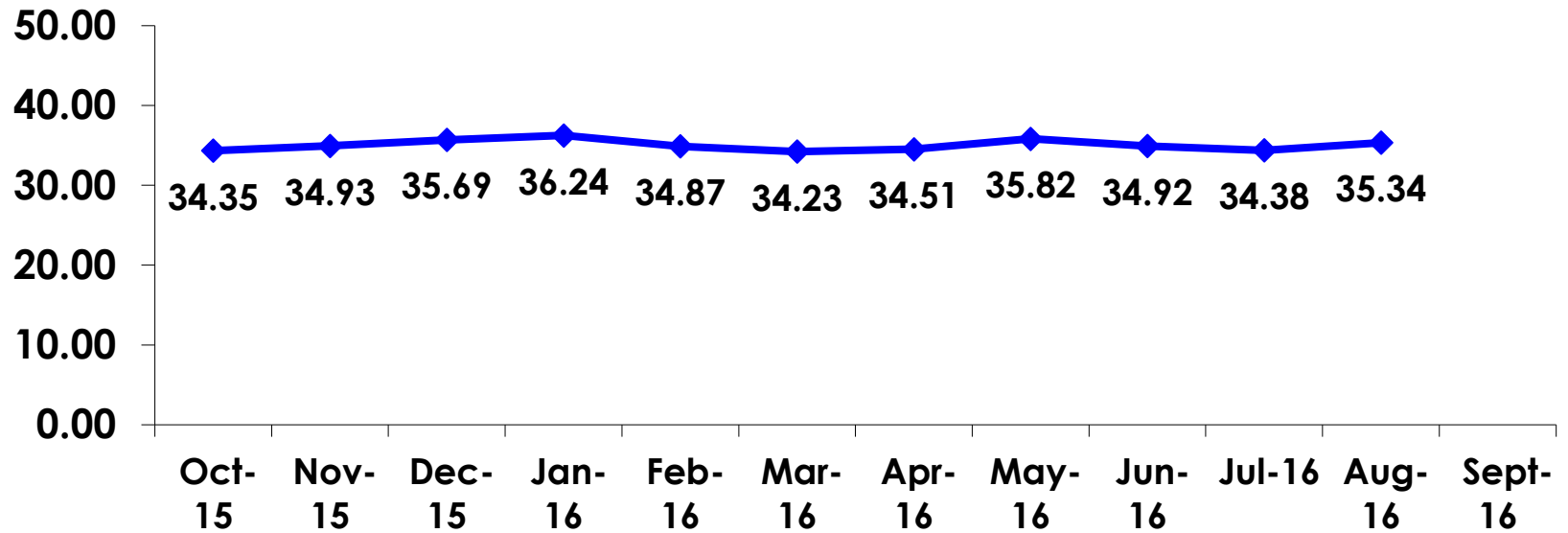


# Age - Overall



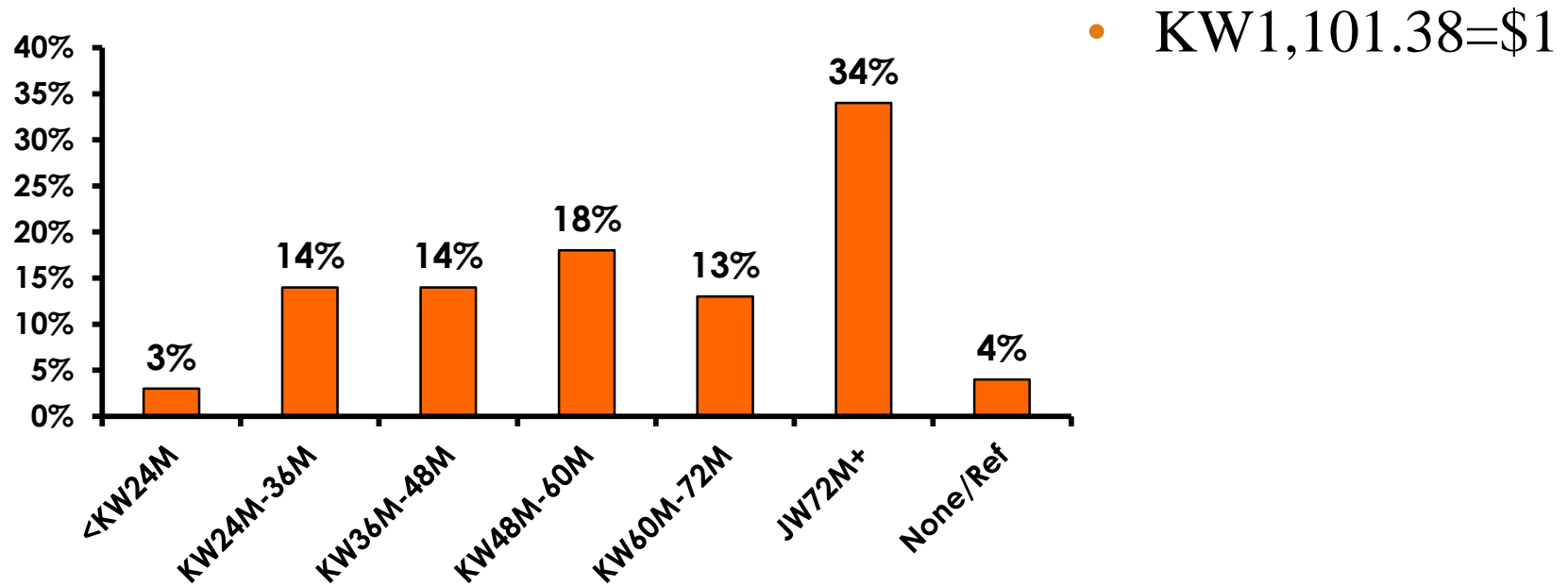
- The average age of the respondents is 35.34 years of age.

# AVERAGE - AGE

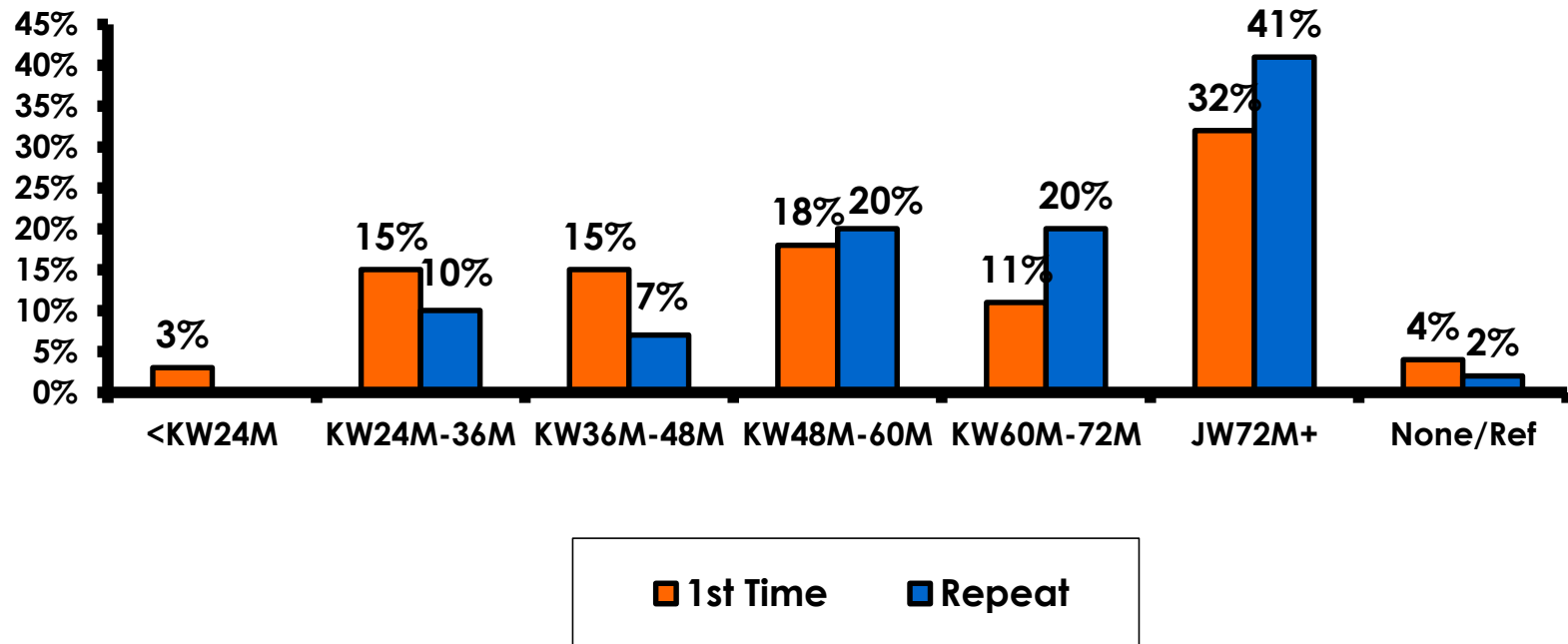




# Personal Income



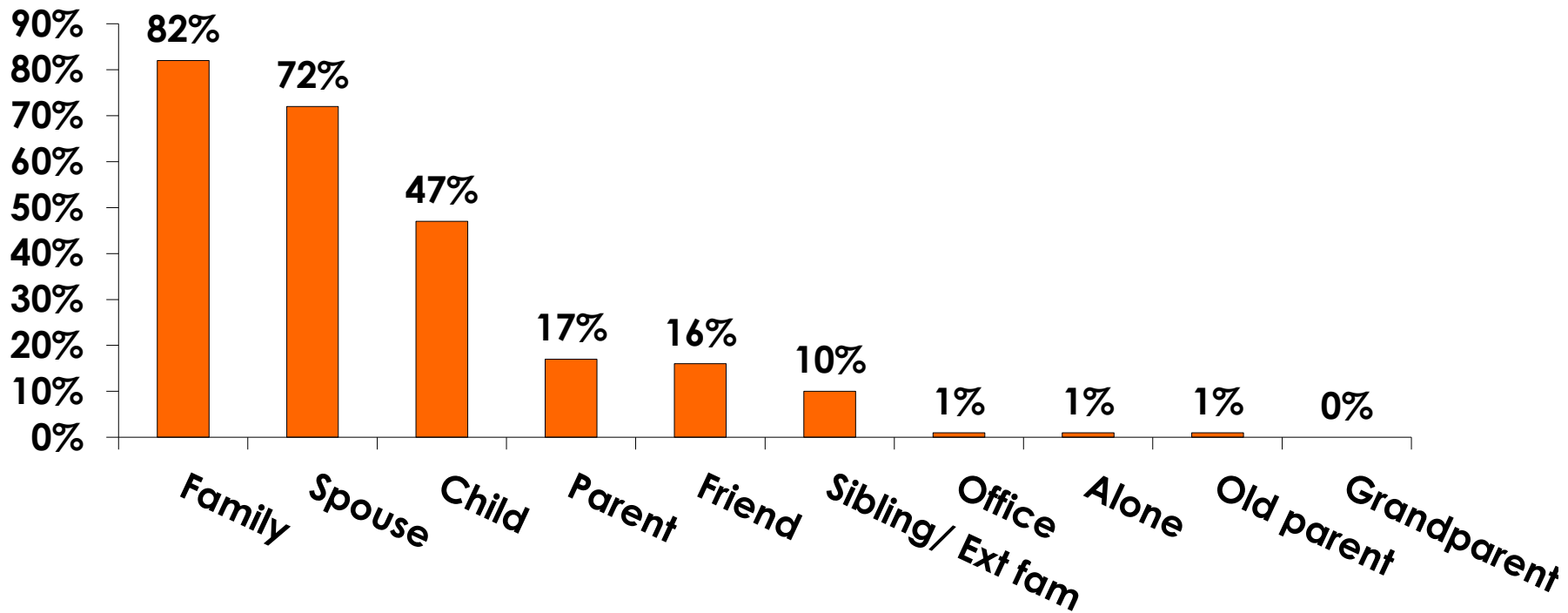
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	2	1	1	1		1	
		Column N %	1%	1%	1%	5%		1%	
	KW12.0M-KW24.0M	Count	6		6	2	3	1	
		Column N %	2%		5%	10%	3%	1%	
	KW24.0M-KW36.0M	Count	35	10	25	4	25	6	
		Column N %	14%	8%	21%	20%	28%	5%	
	KW36.0M-KW48.0M	Count	34	20	14	2	15	17	
		Column N %	14%	16%	12%	10%	17%	13%	
	KW48.0M-KW60.0M	Count	45	28	17	1	18	26	
		Column N %	18%	22%	15%	5%	20%	21%	
	KW60.0M-KW72.0M	Count	31	24	7	2	6	17	6
		Column N %	13%	19%	6%	10%	7%	13%	67%
	KW72.0M+	Count	83	43	40	3	21	56	3
		Column N %	34%	34%	34%	15%	23%	44%	33%
	No Income	Count	9	2	7	5	2	2	
		Column N %	4%	2%	6%	25%	2%	2%	
	Total	Count	245	128	117	20	90	126	9

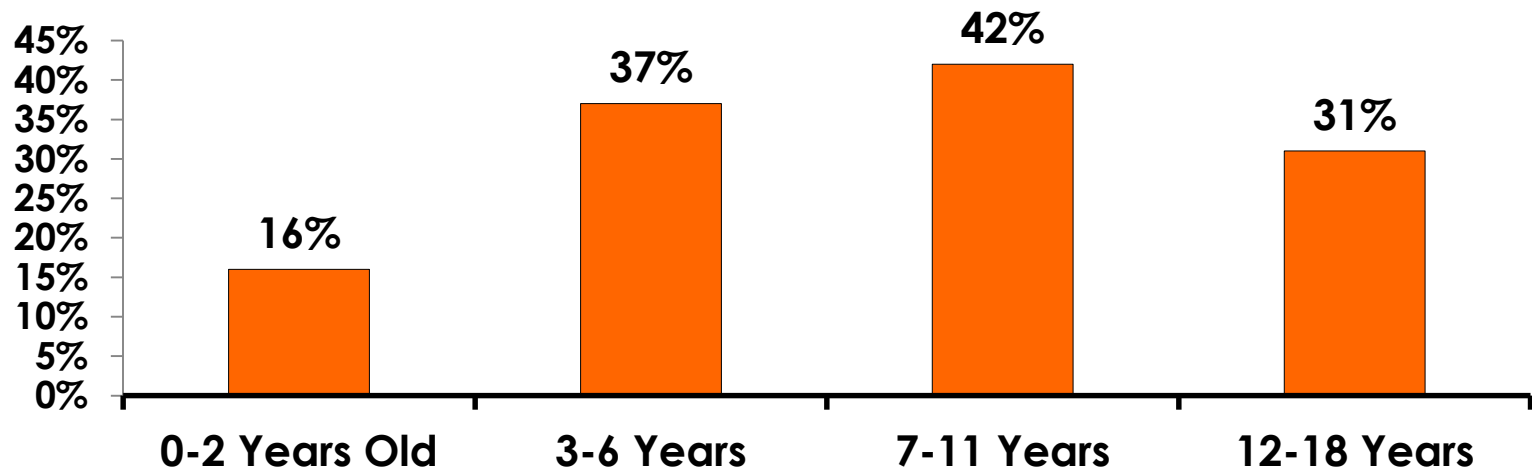
# Travel Companions



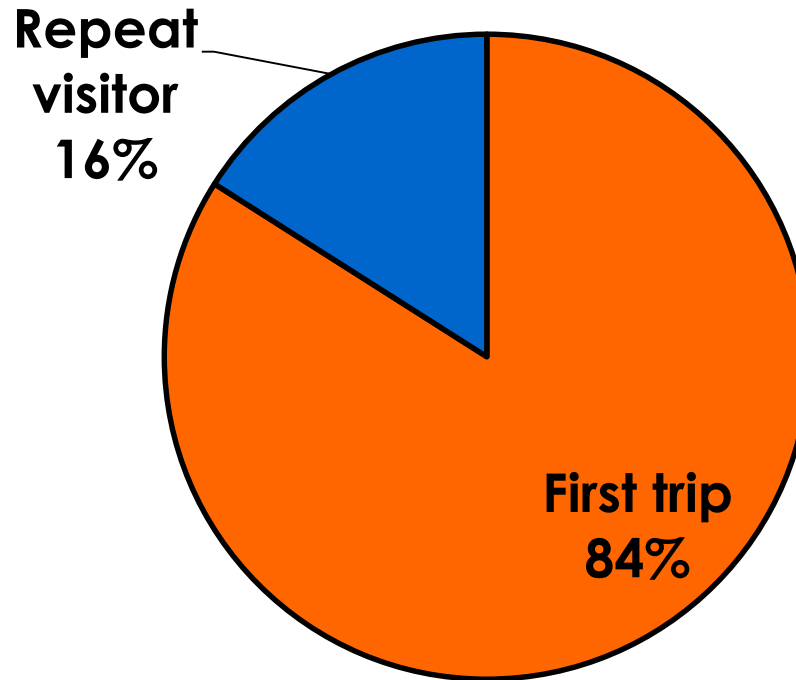
# Number of Children Travel Party

N=167 total respondents traveling with children.

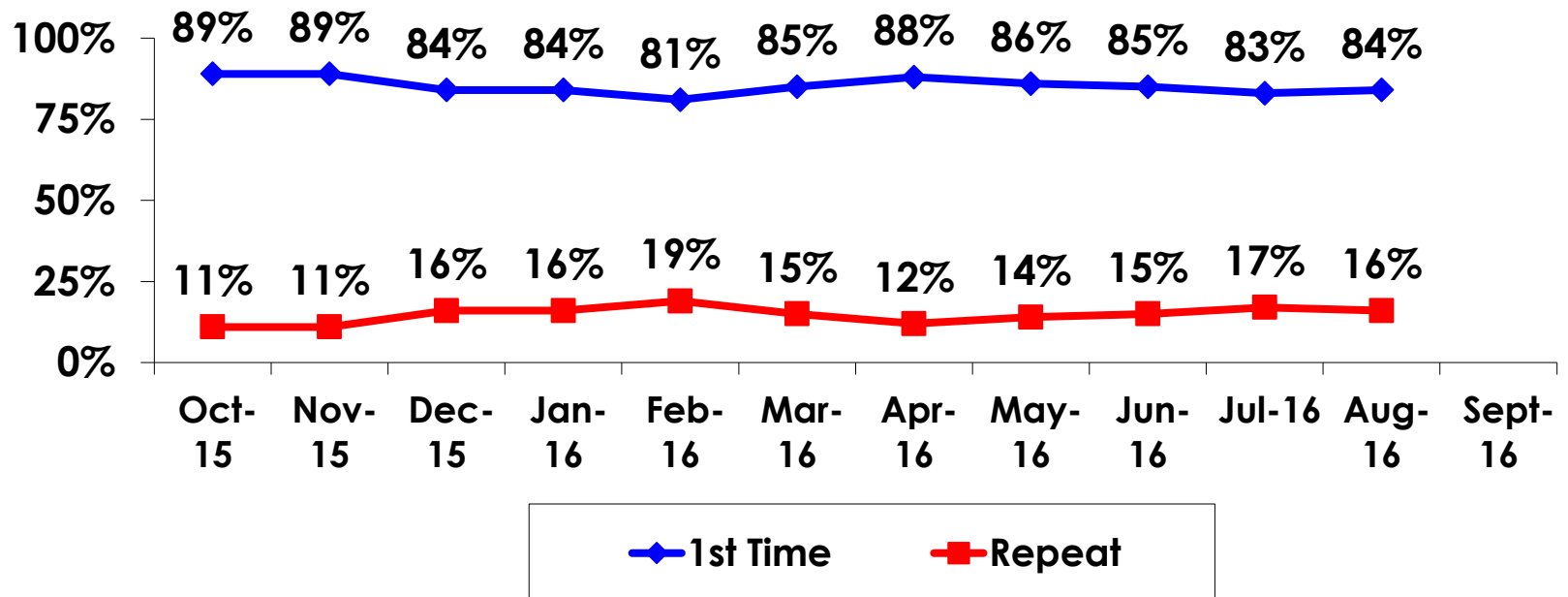
(Of those N=167 respondents, there is a total of 256 children 18 years or younger)



# Prior Trips to Guam



# PRIOR TRIPS TO GUAM



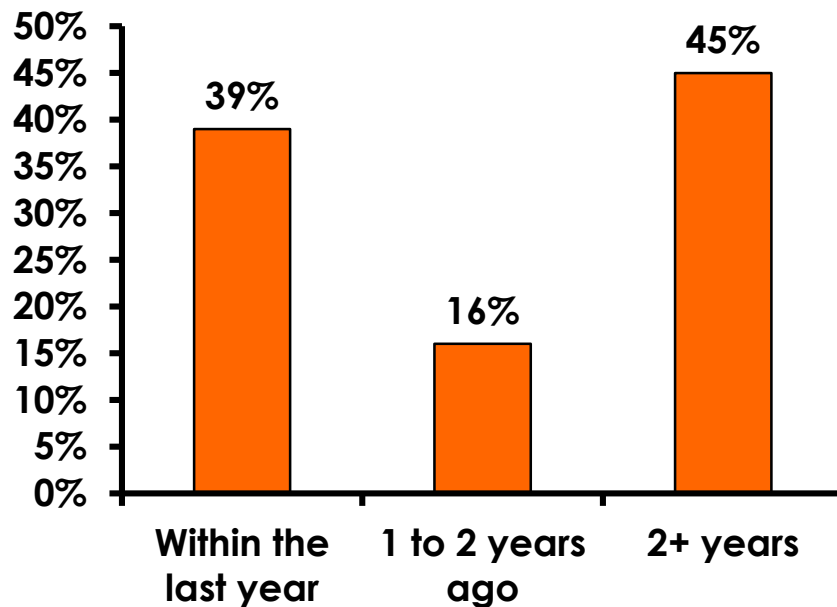
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	177	142	35	
		Column N %	50%	48%	61%	
	Female	Count	177	155	22	
		Column N %	50%	52%	39%	
	Total	Count	354	297	57	
AGE	18-24	Count	29	27	2	
		Column N %	8%	9%	4%	
	25-34	Count	140	129	11	
		Column N %	40%	43%	19%	
	35-49	Count	171	127	44	
		Column N %	48%	43%	77%	
	50+	Count	14	14		
		Column N %	4%	5%		
		Total	Count	354	297	57



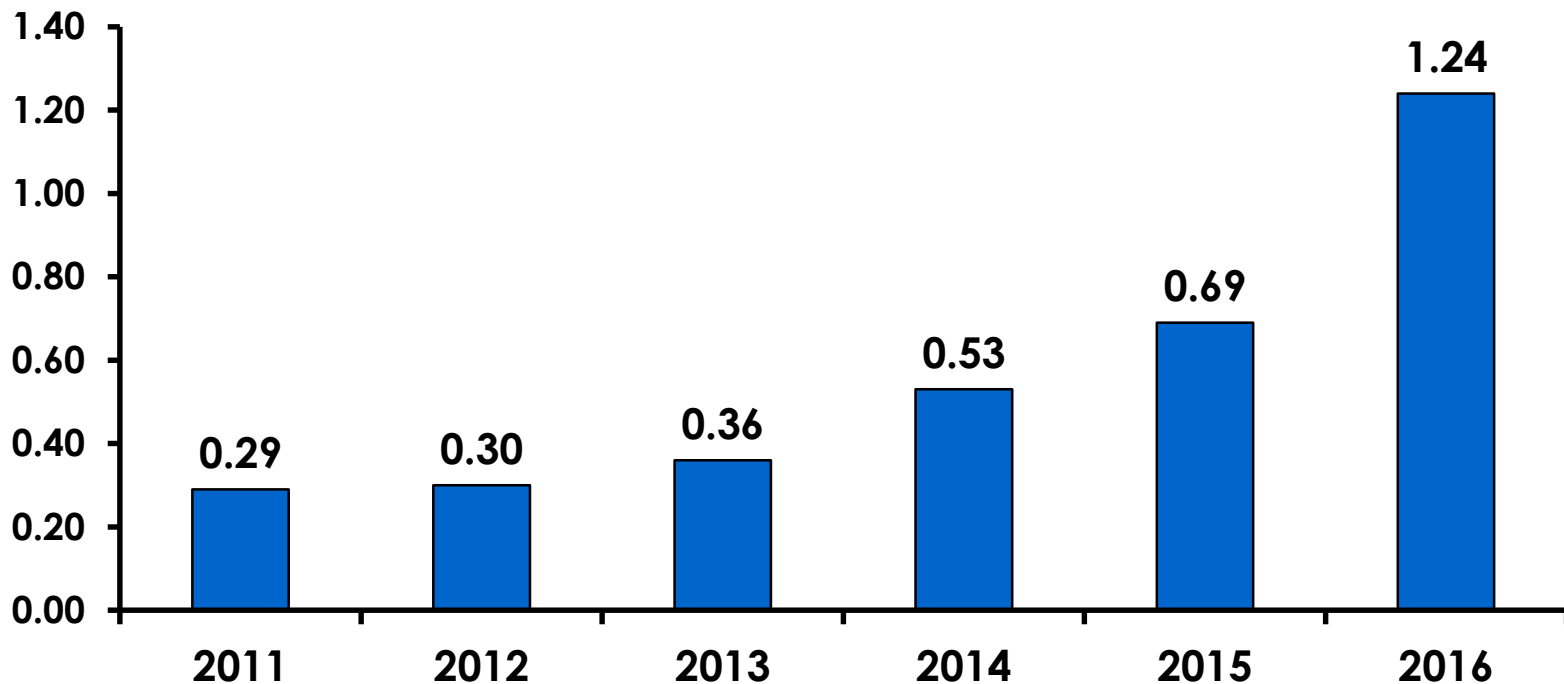
# Repeat Visitors Last Trip

n = 56



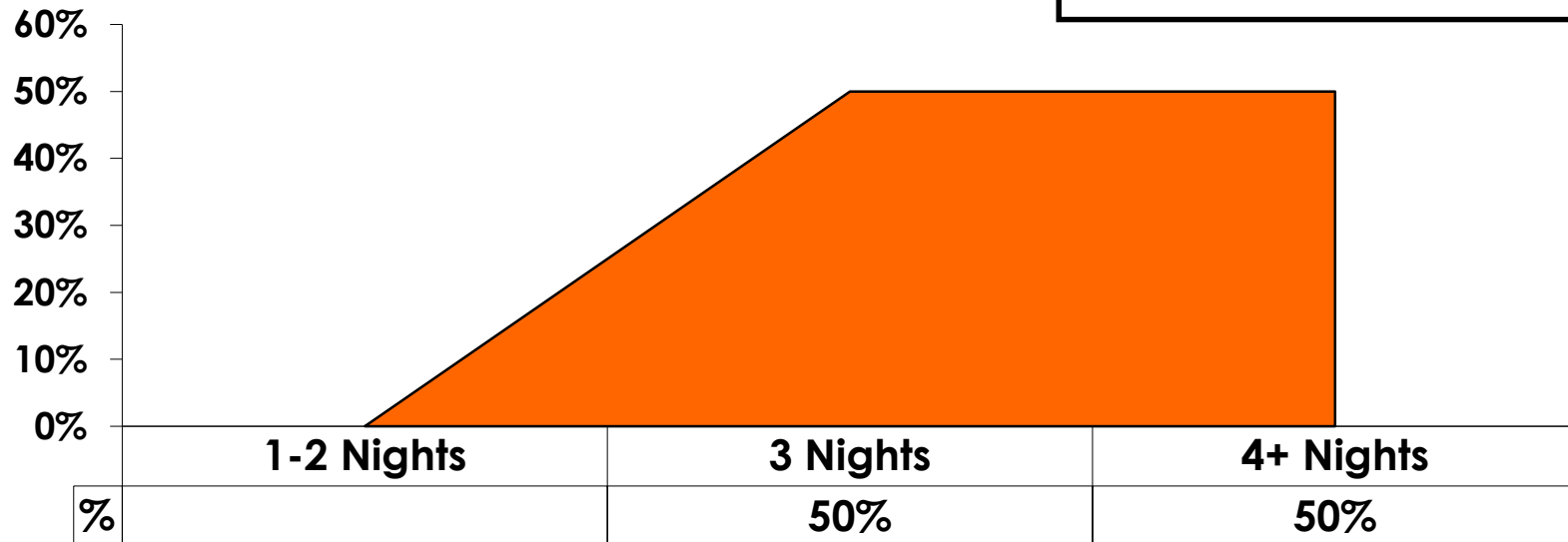
- The average repeat visitor has been to Guam 2.63 times.

# Average Number Overnight Trips (2011-2016) (2 nights or more)

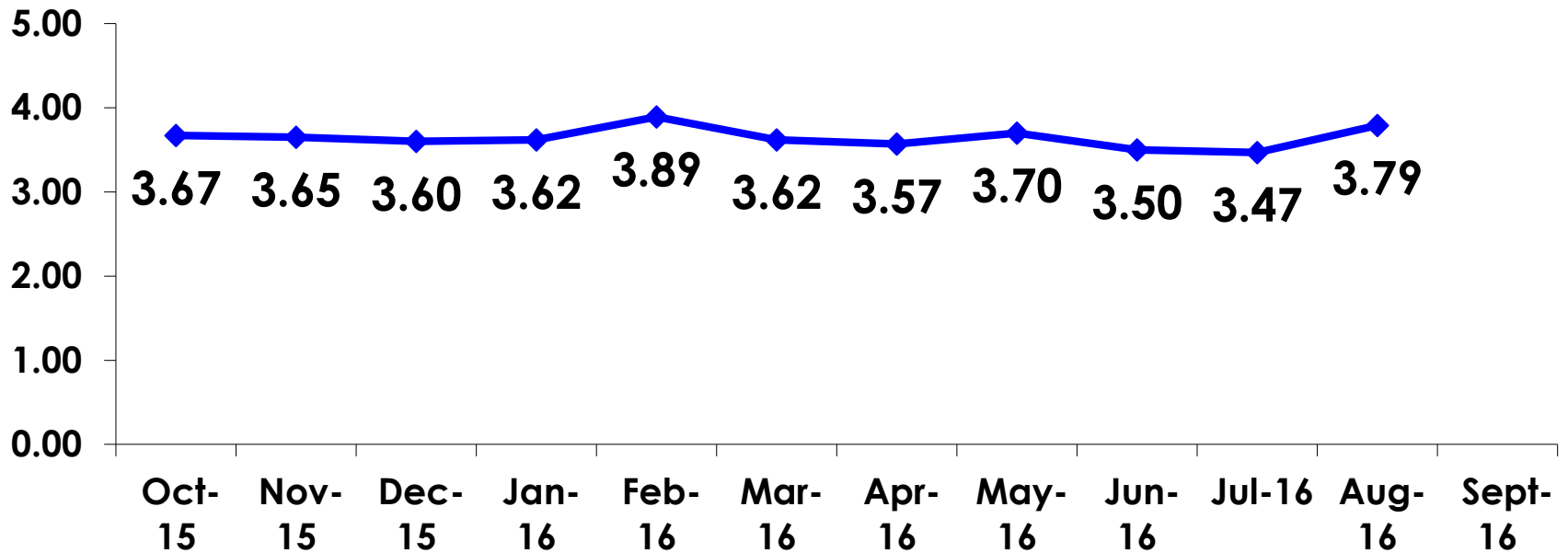


# Length of Stay

Mean = 3.79 Days  
Median = 3.0 Days



# AVG LENGTH OF STAY

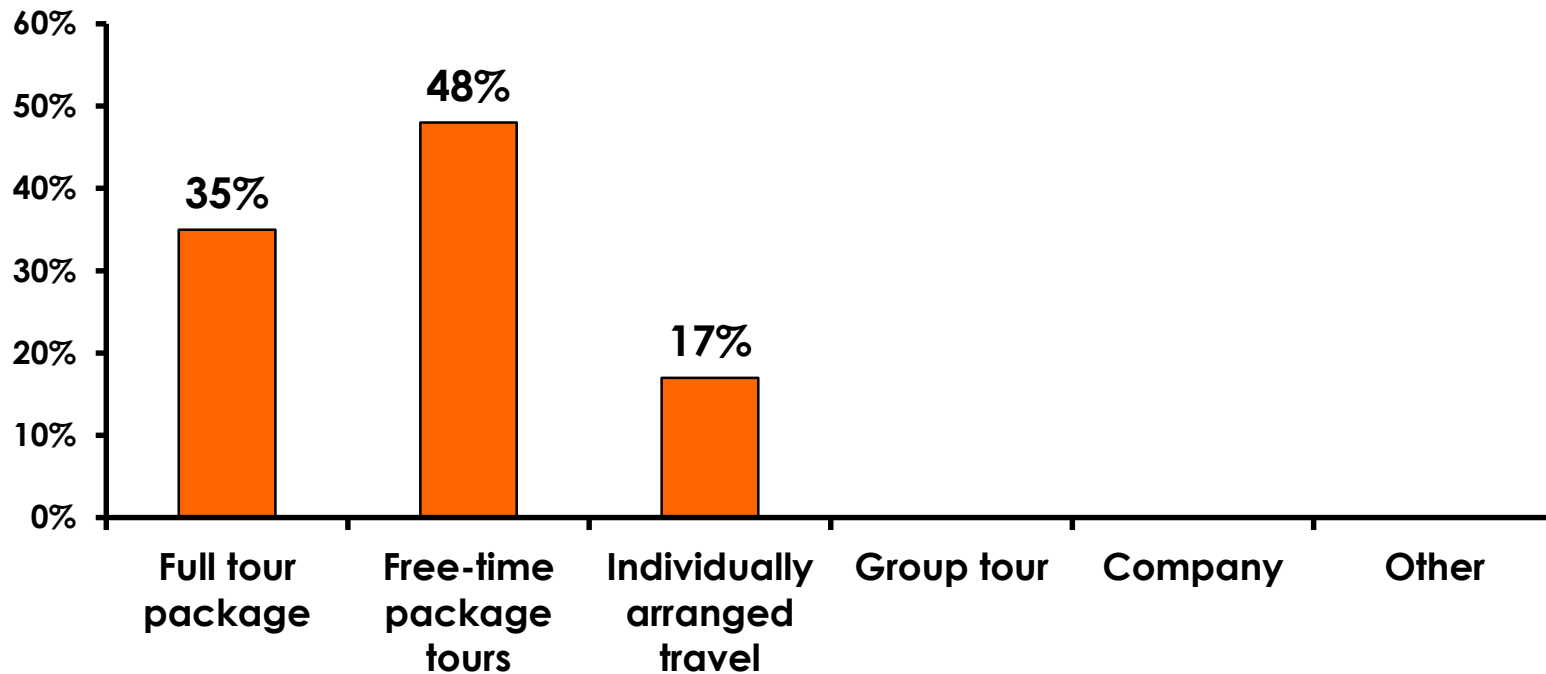


# Occupation by Income

		TOTAL	Q26								
		-	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+	No Income	
Q25	White Collar Office Worker	37%	50%	33%	51%	41%	27%	29%	31%		
	Self-employed	11%			11%	12%	13%	29%	10%		
	Professional/ Specialist/ Tech	11%			6%	9%	9%	16%	16%		
	Housewife/ Homemaker	9%				12%	9%		8%	11%	
	Professor/ Teacher/ After-school	9%		17%	9%	15%	9%	10%	14%		
	Student	5%	50%		3%		4%		5%	56%	
	Service worker/ Private hse worker	5%		17%	3%	6%	11%		1%		
	Freelancer	2%		17%	9%	3%	4%		1%		
	Sales worker/ Clerical	2%		17%	3%			3%	2%		
	Govt- Manager	2%					7%	3%	1%		
	Manager/ Admin	2%						6%	4%		
	Other	1%			6%		4%				
	Unemployed	1%								33%	
	Judicial	1%							4%		
	Farmer/ Forestry/ Fisherman	1%						3%			
	Skilled worker	1%				3%	2%				
	Govt- Executive	1%							1%		
	Retired	0%									
	Govt- office worker non-mgr	0%							1%		
	Total	Count	332	2	6	35	34	45	31	83	9

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



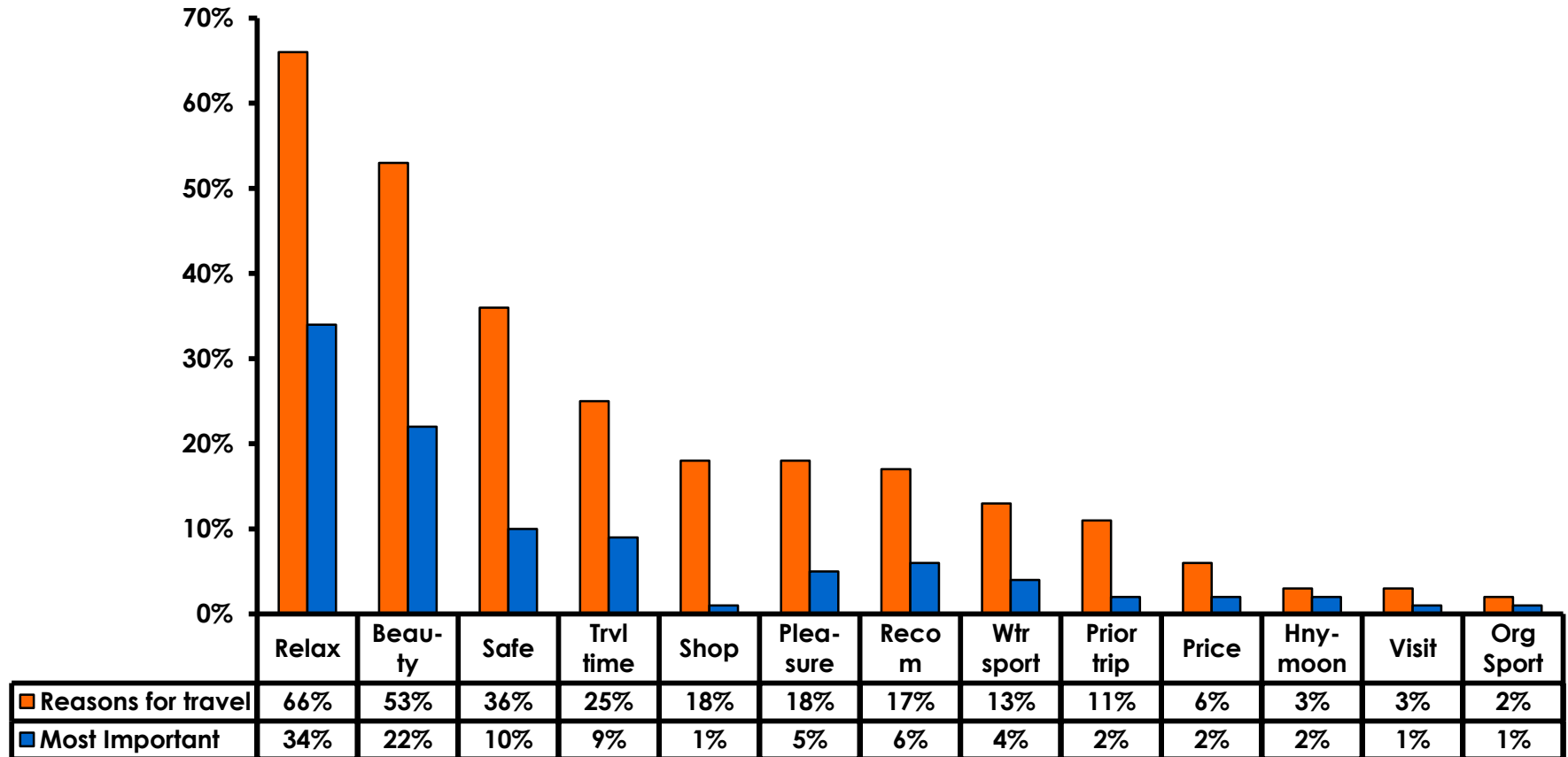
# Accommodation by Income

Average length of stay: 3.79 days

		TOTAL	Q26							No Income
		-	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+	
Q9	PIC Club	28%			6%	29%	30%	32%	36%	22%
	Lotte Hotel Guam	9%		17%	9%	9%	2%	13%	7%	
	Hyatt Regency Guam	9%			9%	6%	11%	13%	13%	11%
	Dusit Thani Guam Resort	7%			6%	3%	9%	3%	7%	11%
	Hotel Nikko Guam	7%			17%	9%	9%	6%	5%	11%
	Sheraton Laguna Guam	4%		17%		3%	5%	6%	4%	11%
	Holiday Resort Guam	4%		17%	6%		5%	3%	6%	11%
	Guam Reef & Olive Spa	3%				6%	2%		5%	
	Outrigger Guam Resort	3%				6%	7%		4%	
	Hilton Guam Resort	3%	50%	17%	6%	6%	2%	3%	2%	
	Onward Beach Resort	3%			3%	3%		3%	1%	11%
	Leo Palace Resort	3%	50%				7%		5%	
	Fiesta Resort Guam	2%		17%	3%	6%	5%			
	Westin Resort Guam	2%			6%	3%	5%			
	Other	2%		17%	9%	3%		3%		
	Home stay/ friend/ relative	2%			3%	6%			1%	
	Bayview Hotel	1%			6%	3%			1%	
	Pacific Star Resort & Spa	1%						3%	2%	
	Verona Resort & Spa	1%					2%			11%
	Royal Orchid Guam	1%			11%					
	Guam Plaza Hotel	1%			3%					
	Condo	1%						6%		
	Days Inn (Maite)	0%						3%		
	Total	100%			25%	24%	14%	24%	22%	11%



# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Relaxation,
- Natural beauty,
- Safety

are the primary reasons for visiting during this period.

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Relax	66%	79%	59%	67%	93%	66%	67%	
	Natural beauty	53%	79%	51%	53%	29%	50%	56%	
	Safe	36%	38%	32%	36%	57%	32%	39%	
	Short travel time	25%	31%	23%	27%	21%	21%	29%	
	Shopping	18%	28%	18%	18%		14%	23%	
	Pleasure	18%	21%	19%	18%		18%	18%	
	Recomm- friend/family/trvl agnt	17%	21%	18%	17%		15%	19%	
	Water sports	13%	17%	17%	9%		12%	14%	
	Previous trip	11%	7%	4%	18%		14%	8%	
	Price	6%	3%	7%	5%	14%	6%	6%	
	Honeymoon	3%		8%	1%		5%	2%	
	Visit friends/ Relatives	3%	3%	1%	3%	14%	5%	1%	
	Organized sports	2%		3%	2%		3%	1%	
	Other	2%		1%	2%	7%	2%	2%	
	Golf	2%		1%	2%		2%	1%	
	Scuba	2%	10%	2%			2%	2%	
	Convention/ Trade/ Conference	1%			1%	7%	1%		
	Company/ Business Trip	1%			1%		1%		
	Career Cert/ Testing	0%		1%			1%		
	Total	Count	354	29	140	171	14	177	177

# Motivation by Income

		TOTAL	Q26							No Income	
		-	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+		
Q5A	Relax	66%	100%	50%	60%	74%	60%	74%	66%	44%	
	Natural beauty	53%	50%	67%	54%	56%	51%	52%	60%	44%	
	Safe	36%		17%	31%	26%	36%	39%	45%	33%	
	Short travel time	25%		17%	20%	32%	33%	23%	30%	44%	
	Shopping	18%		17%	11%	21%	13%	23%	22%	56%	
	Pleasure	18%		17%	9%	18%	18%	16%	18%	33%	
	Recomm- friend/family/trvl agnt	17%		33%	17%	21%	20%	13%	19%	22%	
	Water sports	13%		33%	26%	12%	11%	10%	14%	11%	
	Previous trip	11%			6%	3%	16%	19%	14%		
	Price	6%			17%	3%	13%		7%	11%	
	Honeymoon	3%		17%	11%	3%	2%	3%	1%		
	Visit friends/ Relatives	3%			6%	3%	2%		5%	11%	
	Organized sports	2%			3%		7%		2%		
	Other	2%			3%				2%	11%	
	Golf	2%					2%	3%	4%		
	Scuba	2%		17%	3%				1%	11%	
	Convention/ Trade/ Conference	1%									
	Company/ Business Trip	1%							1%		
	Career Cert/ Testing	0%				3%					
	Total	Count	354	2	6	35	34	45	31	83	9

# SECTION 3 **EXPENDITURES**

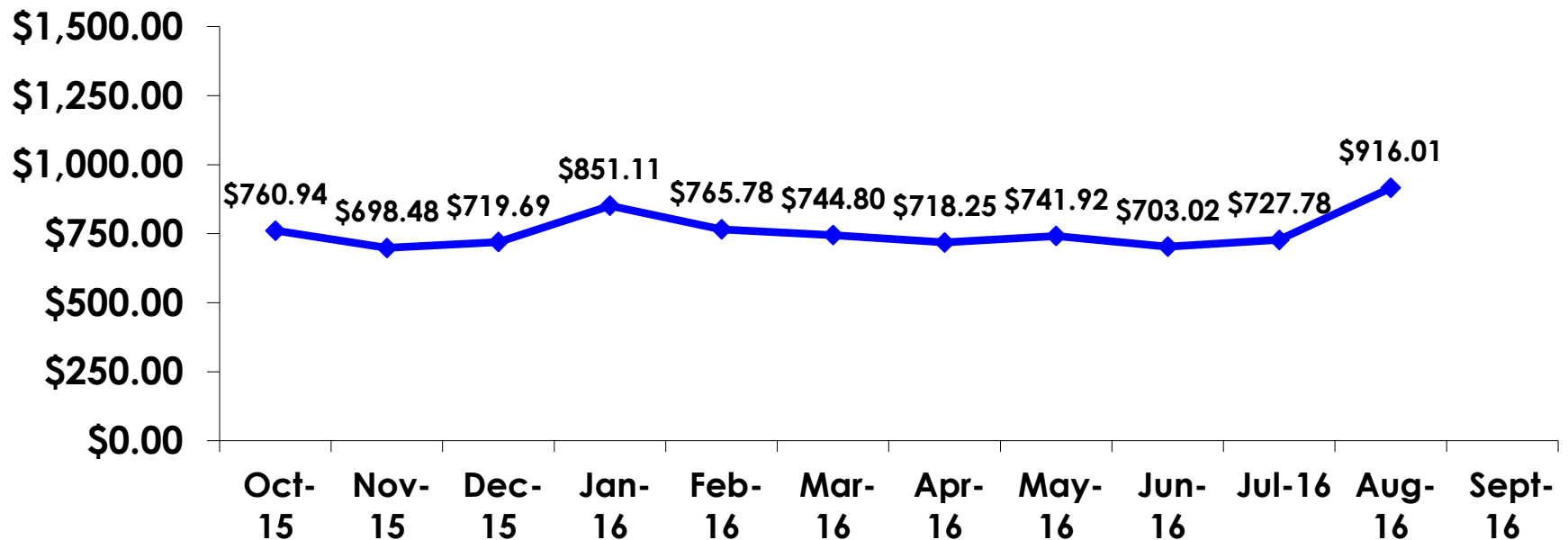
# Prepaid Expenditures

KW 1,101.38/US\$1

- \$2,853.07 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$18,159 = maximum (highest amount recorded for the entire sample)
- \$916.01 = overall mean average per person prepaid expenditures

# PREPAID EXPENDITURES

## Per Person



YTD=\$758.59

# Breakdown of Prepaid Expenditures

## KW 1,101.38=\$1

(Filter: Only those who responded/  
Per Travel Party)

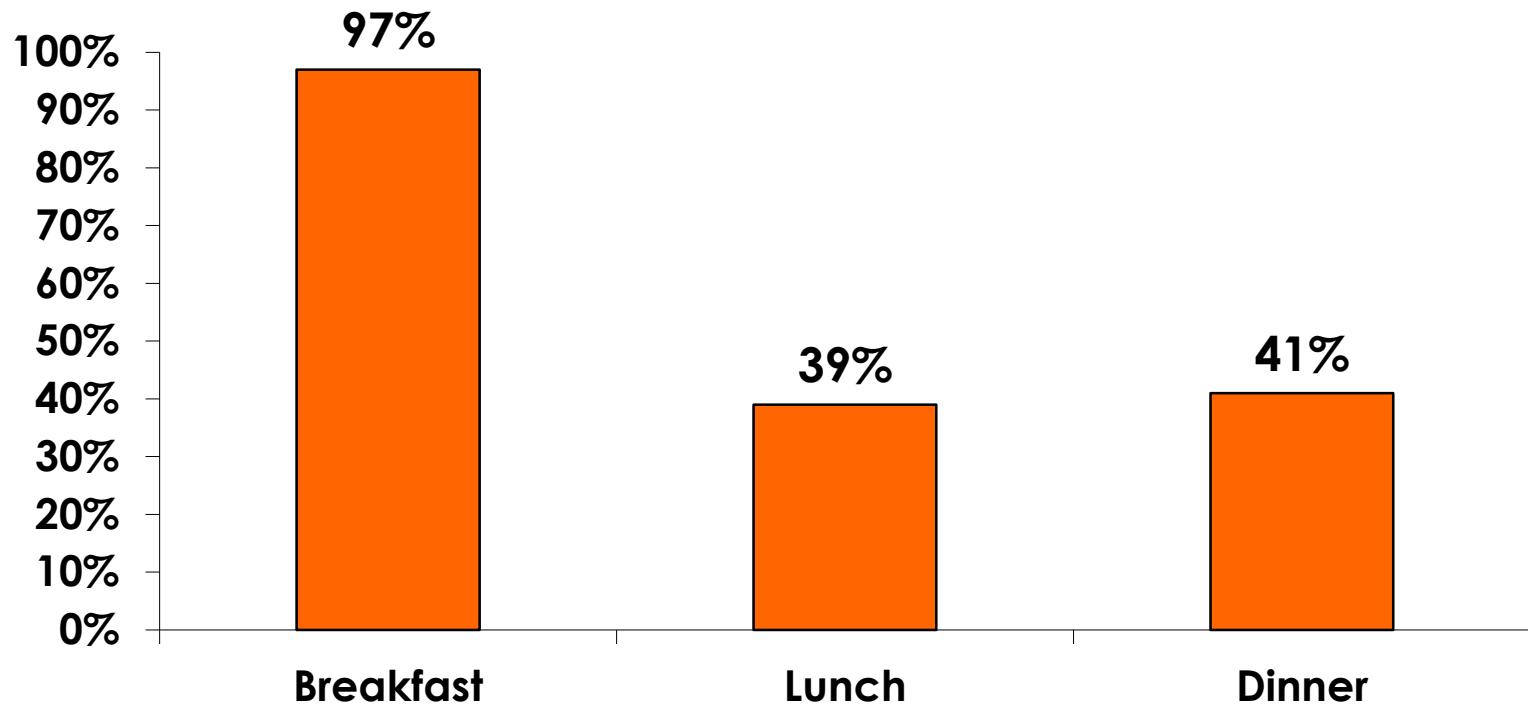
	MEAN \$
Air & Accommodation package only	\$3,127.62
Air & Accommodation w/ daily meal package	\$4,096.07
Air only	\$1,594.29
Accommodation only	\$1,082.18
Accommodation w/ daily meal only	\$2,103.42
Food & Beverages in Hotel	\$70.28
Ground transportation – Korea	\$97.84
Ground transportation – Guam	\$188.85
Optional tours/ activities	\$282.22
Other expenses	\$442.98
<b>Total Prepaid</b>	<b>\$2,853.07</b>



# PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=118

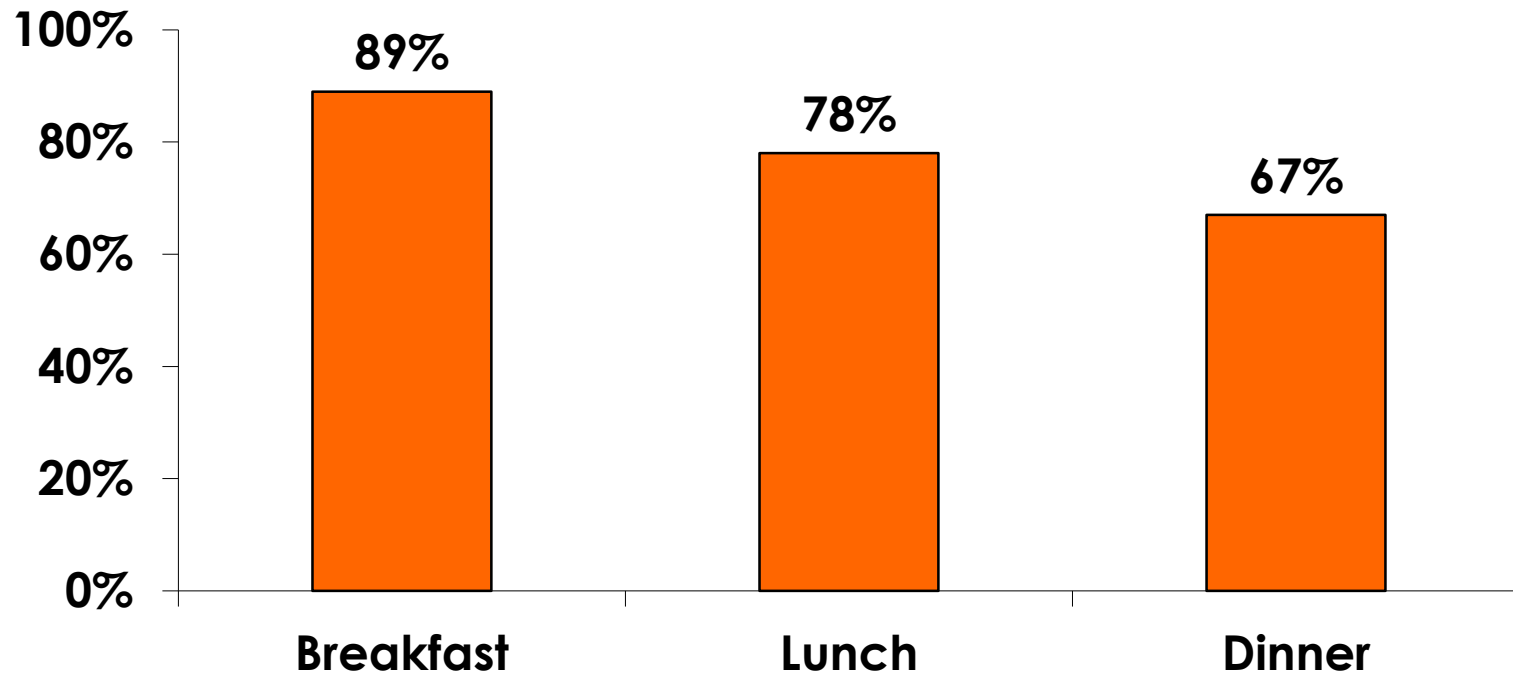


Mean=\$4,096.07 per travel party

# PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

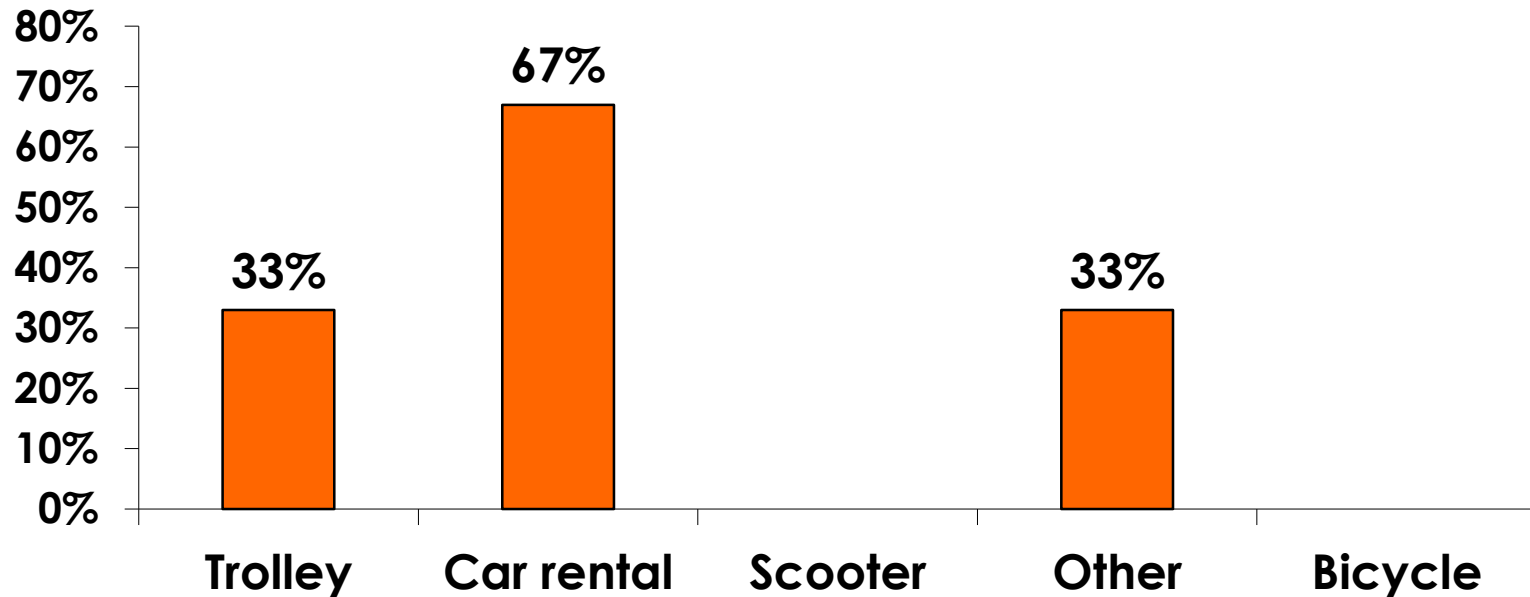
n=9



Mean=\$2,103.42 per travel party

# PREPAID GROUND TRANSPORTATION

n=3



Mean=\$188.85 per travel party

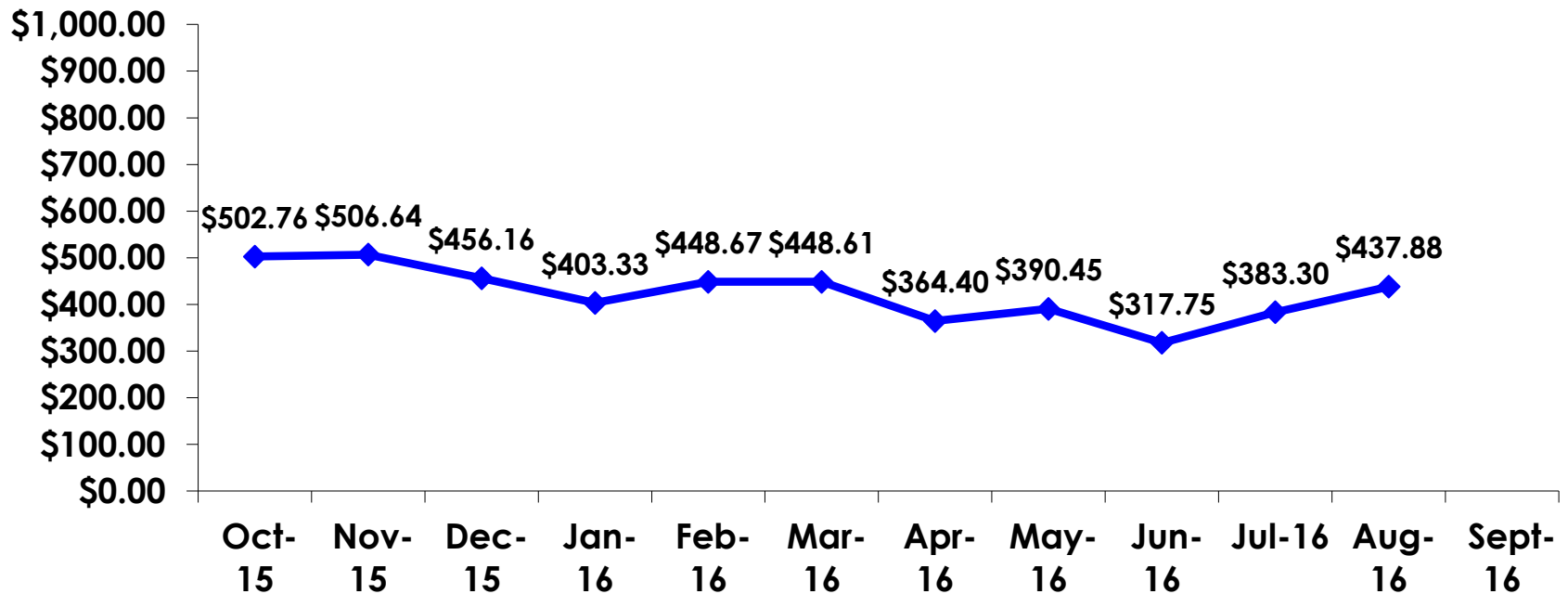
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# On-Island Expenditures

- \$1,193.77 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,953 = Maximum (highest amount recorded for the entire sample)
- \$437.88 = overall mean average per person on-island expenditure

# ON-ISLAND EXPENDITURES

## Per Person

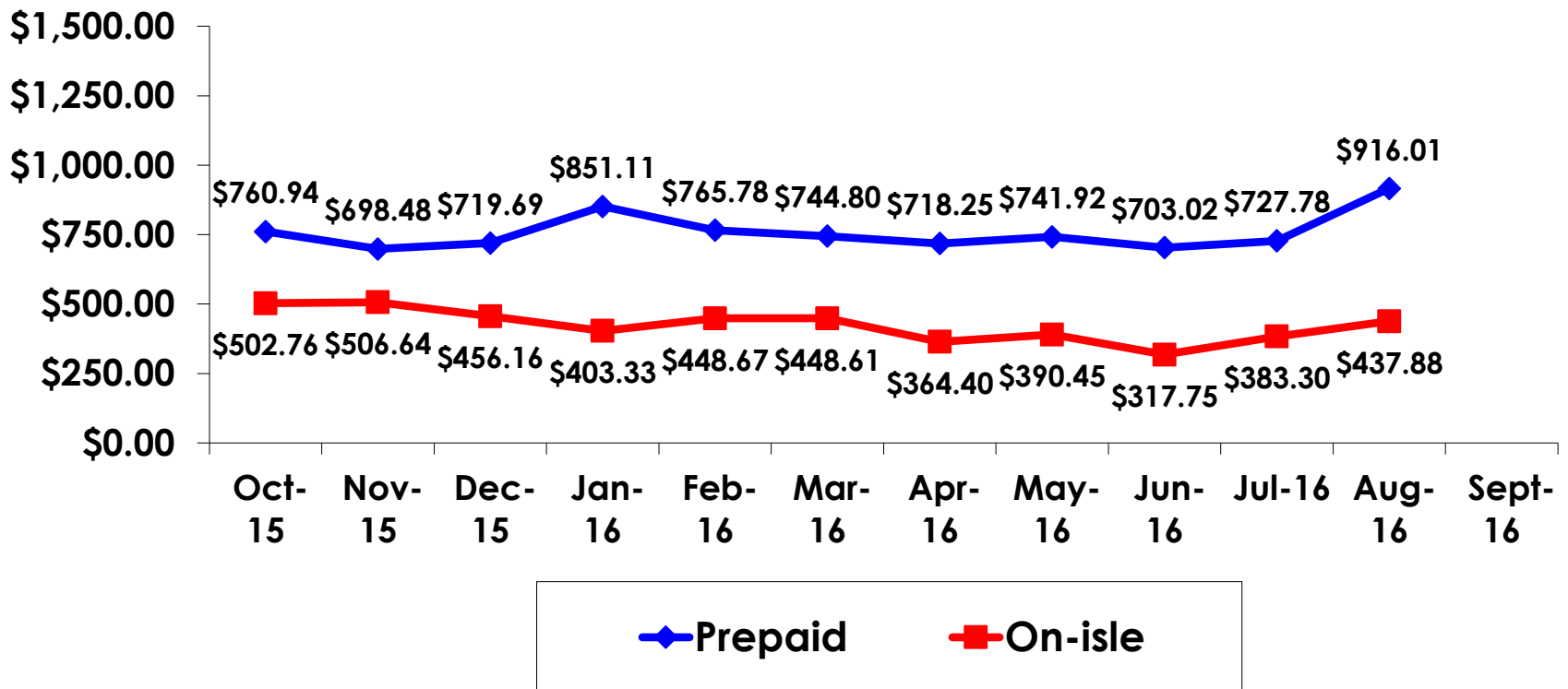


YTD = \$423.99

# PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$758.59

On-Isle YTD = \$423.99



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			-	Male	Female	Male				Female		
		AGE				AGE						
		18-24				25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$423.99	\$440.15	\$407.86	\$420.12	\$502.22	\$386.23	\$518.04	\$396.13	\$444.90	\$357.22	\$456.65
	Median	\$308	\$322	\$300	\$218	\$400	\$267	\$267	\$265	\$356	\$250	\$279
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,500	\$4,000	\$4,500	\$2,500	\$3,000	\$4,000	\$3,500	\$3,500	\$4,500	\$4,100	\$2,500

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$62.63	\$71.57	\$53.86	\$31.16	\$50.72	\$80.88	\$36.69
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.34	\$27.34	\$27.27	\$19.59	\$23.55	\$32.56	\$22.12
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$94.78	\$100.60	\$88.64	\$57.84	\$102.35	\$91.90	\$91.79
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$80.43	\$84.38	\$76.72	\$95.80	\$72.89	\$83.20	\$111.82
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$173.08	\$171.17	\$175.11	\$103.83	\$184.15	\$178.84	\$76.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$115.01	\$112.85	\$117.37	\$72.65	\$122.03	\$109.47	\$158.87
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$64.33	\$66.33	\$62.35	\$36.89	\$71.23	\$62.28	\$42.74
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$485.05	\$561.48	\$409.68	\$397.70	\$436.13	\$527.41	\$685.72
	Median	\$5	\$6	\$6	\$2	\$10	\$0	\$40
TOTAL	Mean	\$1,102.47	\$1,196.38	\$1,009.97	\$815.76	\$1,063.03	\$1,166.11	\$1,226.31
	Median	\$820	\$900	\$800	\$500	\$900	\$850	\$800



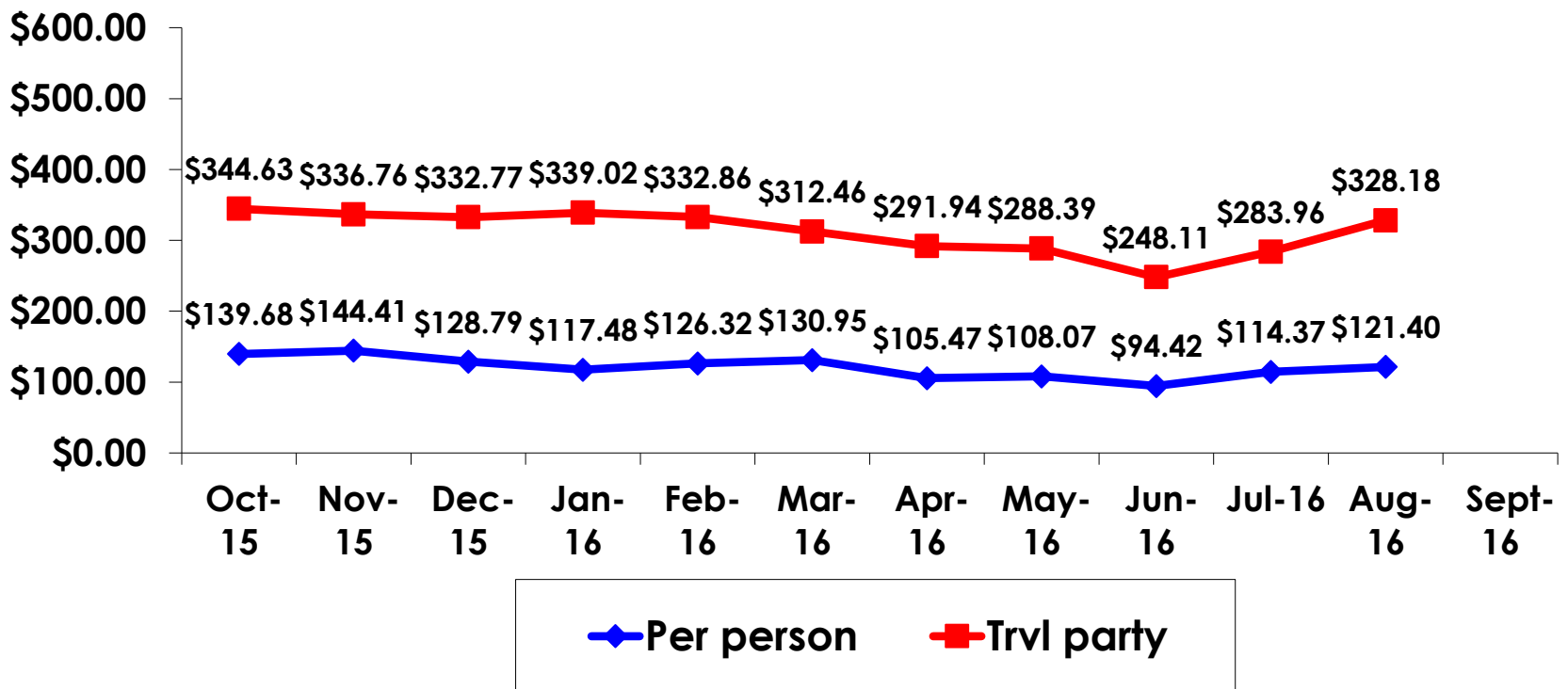
# On-Island Expenditures

## First time vs. Repeat

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$62.63	\$55.56	\$102.72
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.34	\$25.10	\$40.25
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$94.78	\$85.43	\$149.89
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$80.43	\$83.50	\$61.98
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$173.08	\$163.69	\$229.65
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$115.01	\$114.38	\$119.25
	Median	\$0	\$0	\$0
TRANS	Mean	\$64.33	\$61.47	\$81.87
	Median	\$0	\$0	\$0
OTHER	Mean	\$485.05	\$485.83	\$478.21
	Median	\$5	\$10	\$0
TOTAL	Mean	\$1,102.47	\$1,074.54	\$1,265.03
	Median	\$820	\$800	\$900

# ON-ISLE EXPENDITURES – Per Day

YTD Per Person = \$121.13    YTD Travel Party = \$312.76

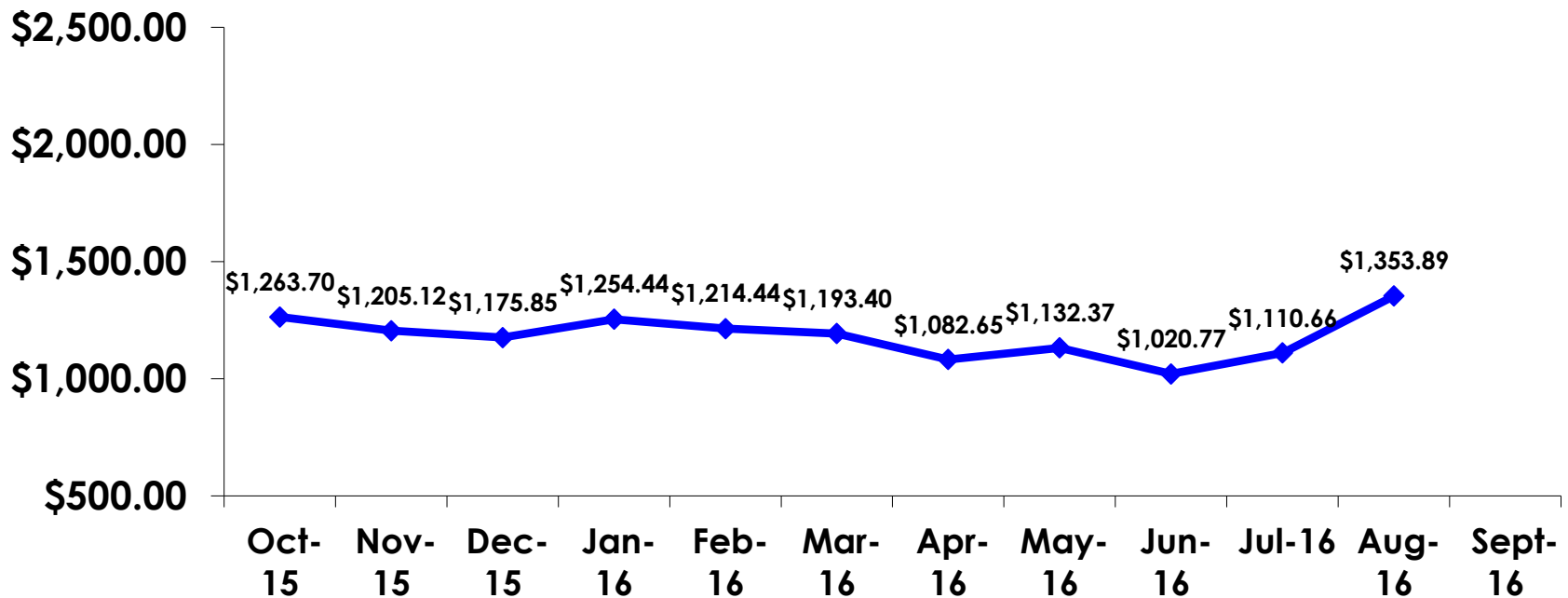


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,353.89 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,768 = Maximum (highest amount recorded for the entire sample)

# TOTAL EXPENDITURES Per Person



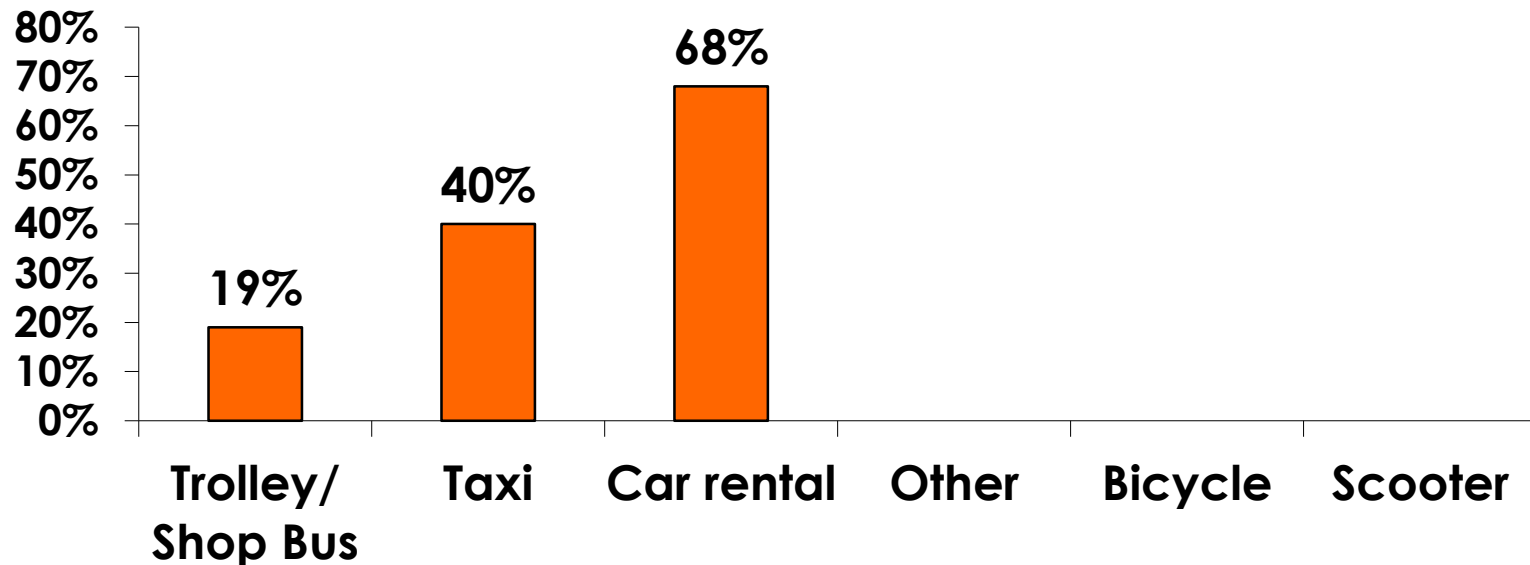
YTD=\$1,182.56

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$70.27
Food & beverage in fast food restaurant/convenience store	\$19.37
Food & beverage at restaurants or drinking establishments outside a hotel	\$89.72
Optional tours and activities	\$84.72
Gifts/ souvenirs for yourself/companions	\$148.25
Gifts/ souvenirs for friends/family at home	\$82.57
Local transportation	\$67.50
Other expenses not covered	\$631.37
<b>Average Total</b>	<b>\$1,193.77</b>

# Local Transportation

n=136



Mean=\$67.50 per travel party

---

# Guam Airport Expenditures

- \$71.35 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,500 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$10.05
<b>Gifts/Souvenirs Self</b>	\$35.61
<b>Gifts/Souvenirs Others</b>	\$25.69
<b>Total</b>	<b>\$71.35</b>



# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

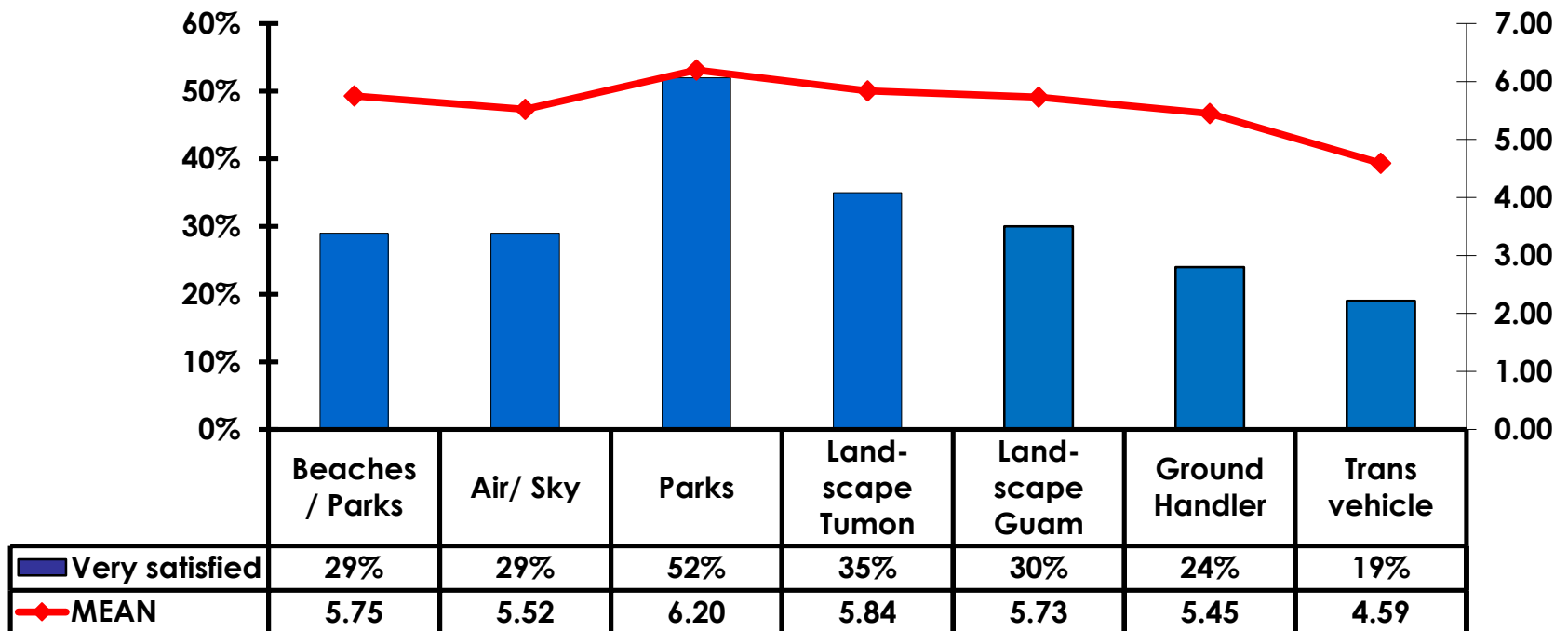
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

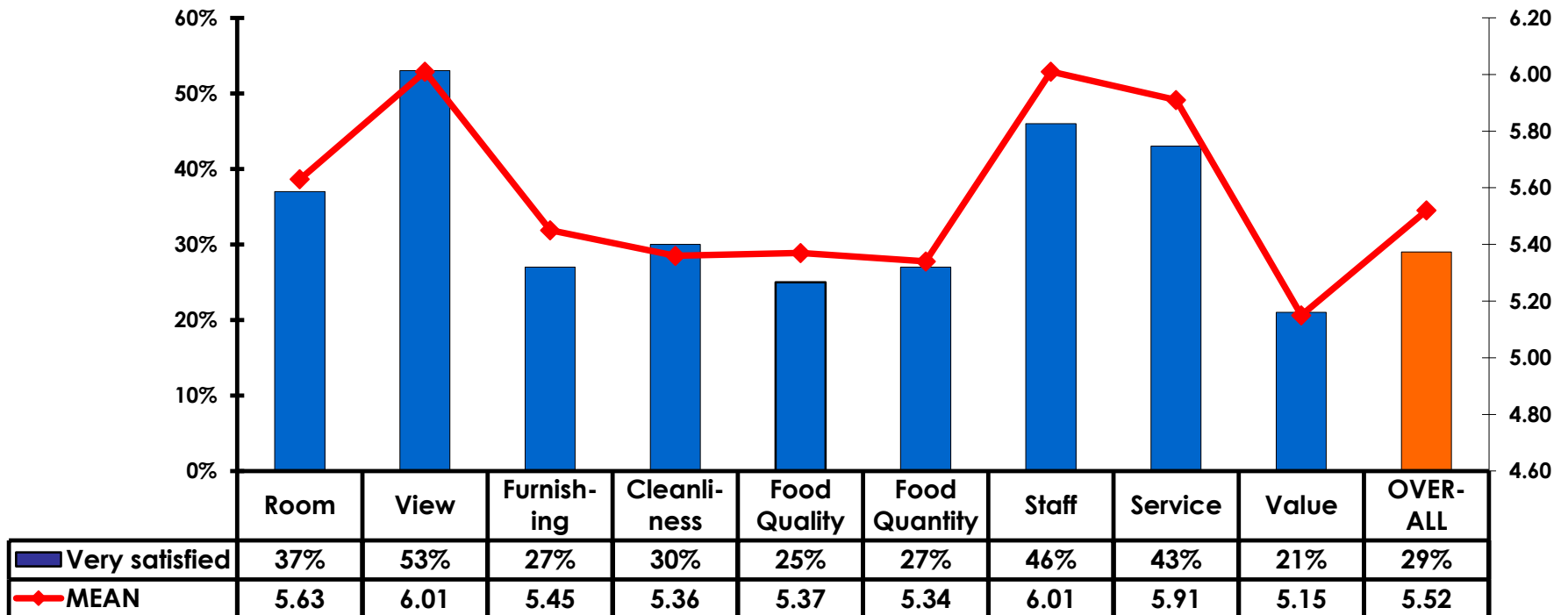
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

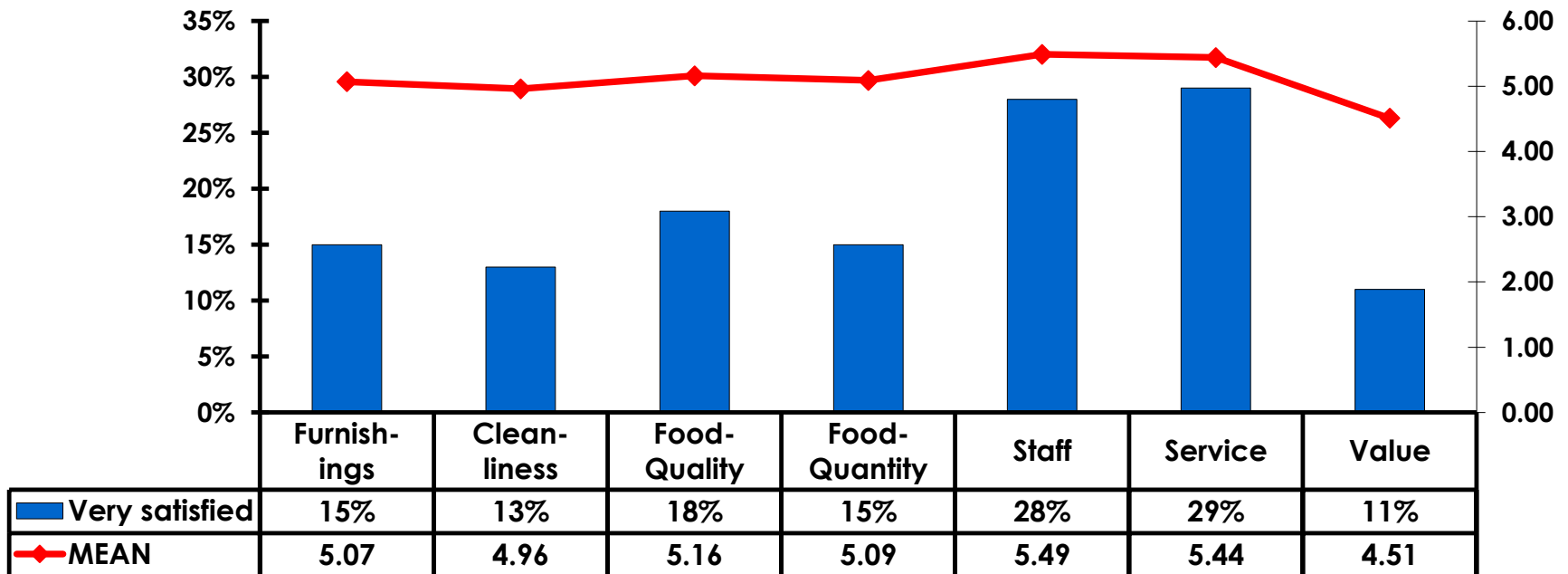
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

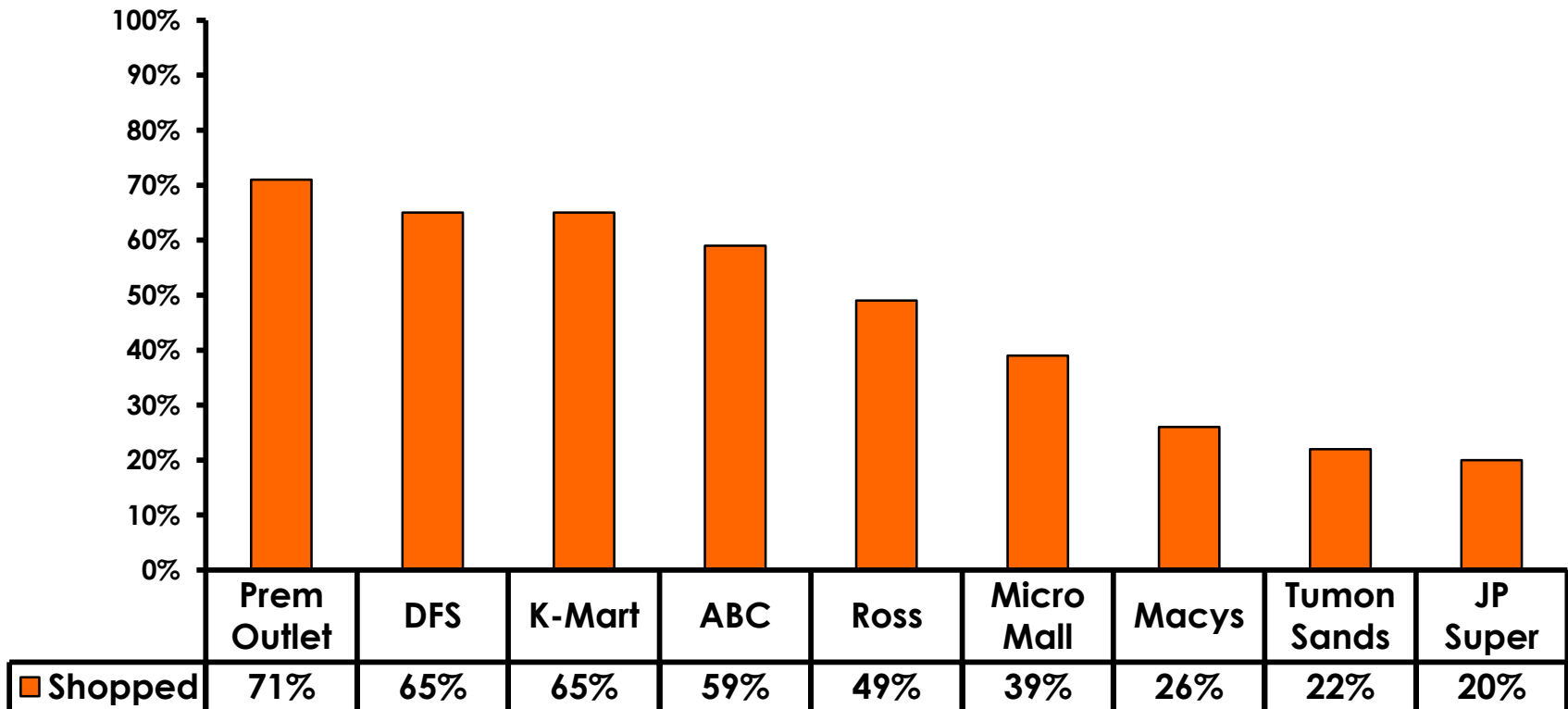
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

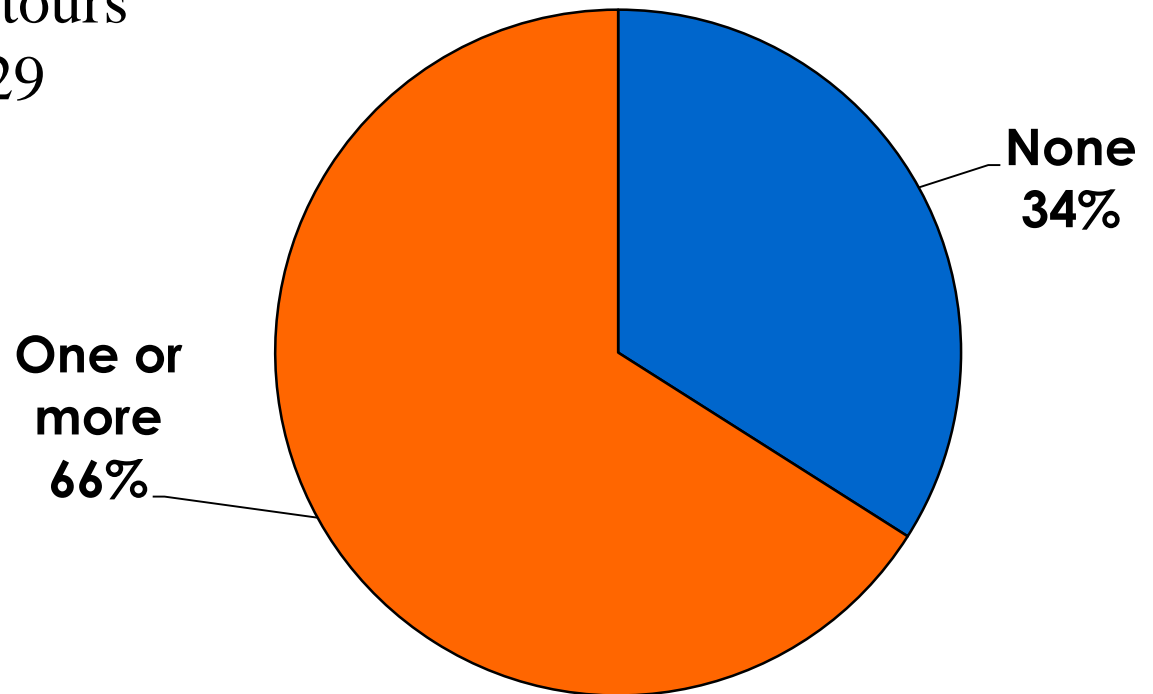
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>63%</b>	Score of 6 to 7 = <b>56%</b>
Score of 4 to 5 = <b>32%</b>	Score of 4 to 5 = <b>37%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 5.67</b>	<b>MEAN = 5.48</b>

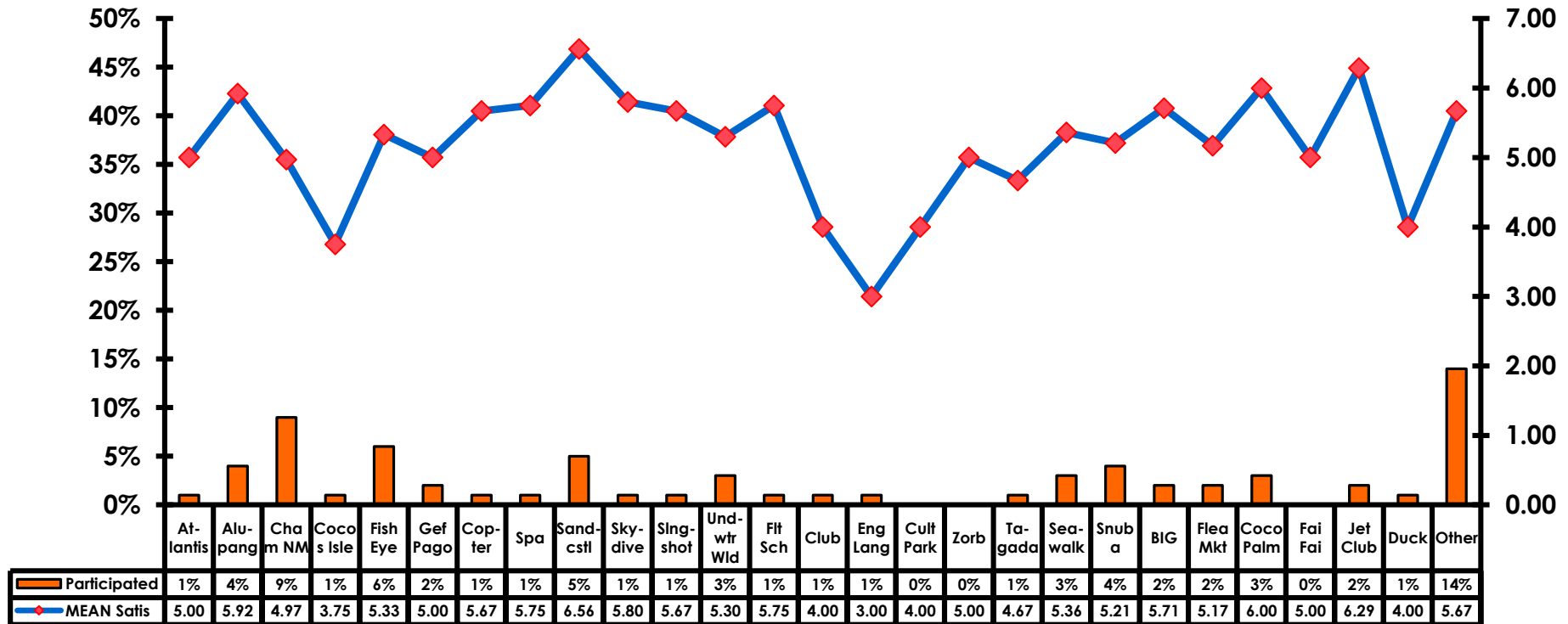
# Optional Tour Participation

- Average number of tours participated in is 1.29





# Optional Tours Participation & Satisfaction



# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>59%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>37%</b>	Score of 4 to 5 = <b>42%</b>
Score 1 to 3 = <b>5%</b>	Score 1 to 3 = <b>7%</b>
<b>MEAN = 5.50</b>	<b>MEAN = 5.36</b>

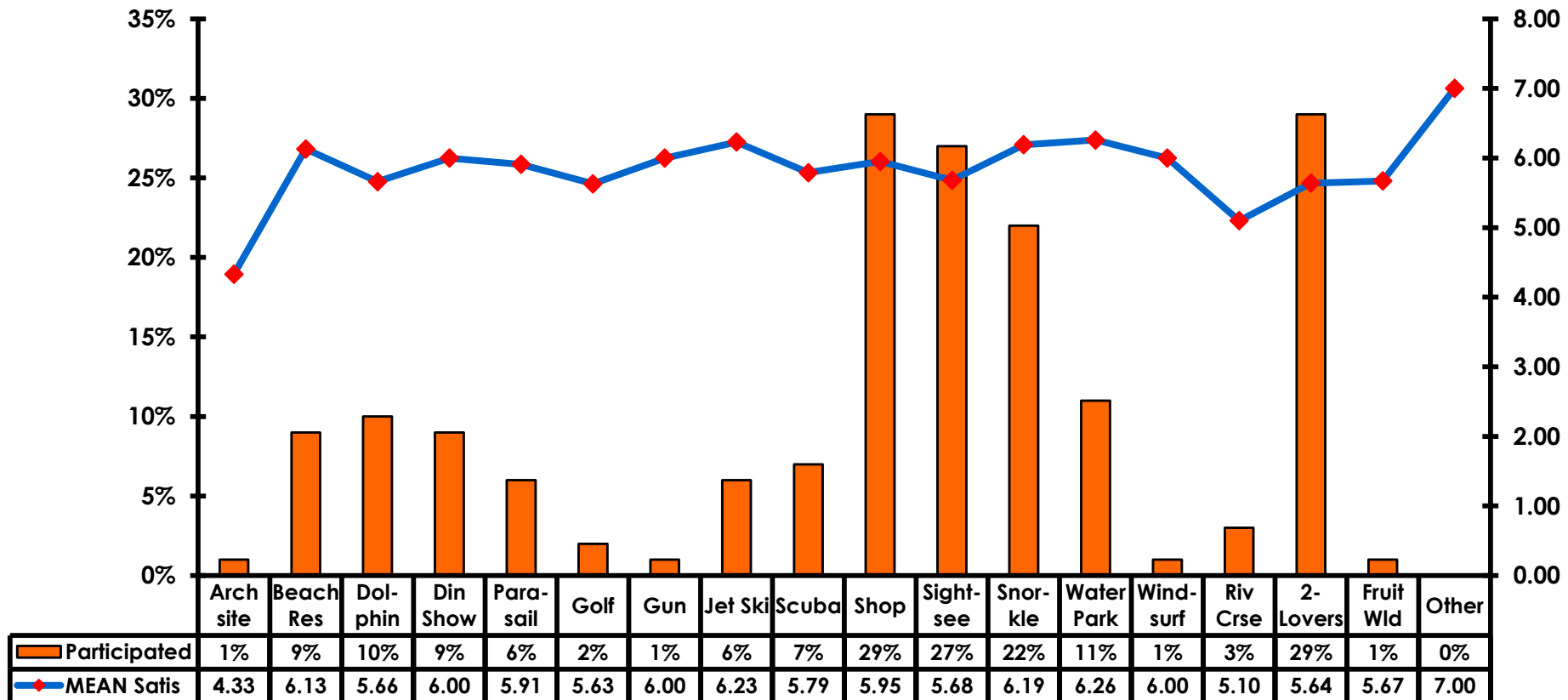
# Night Tours Satisfaction

7pt Rating Scale

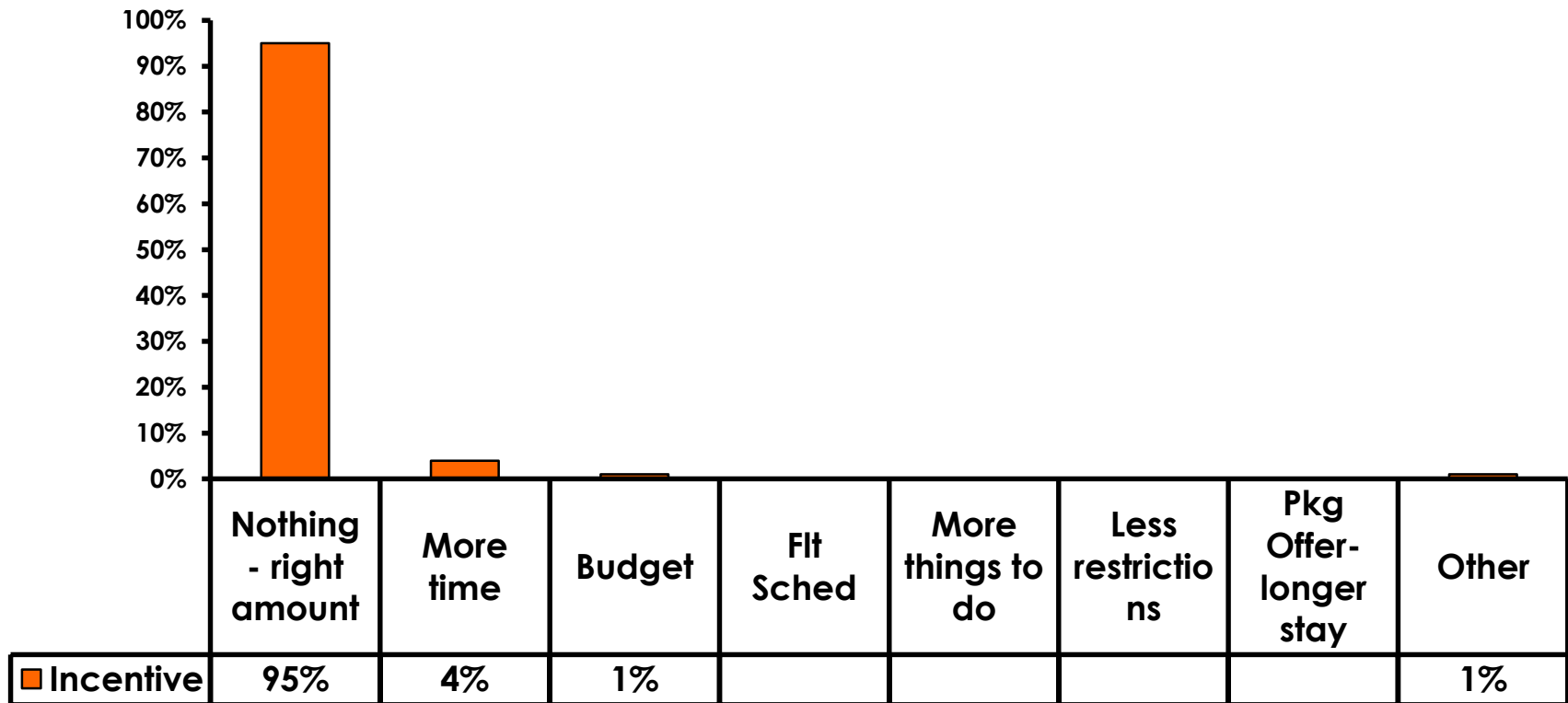
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>38%</b>	Score of 6 to 7 = <b>36%</b>
Score of 4 to 5 = <b>50%</b>	Score of 4 to 5 = <b>49%</b>
Score 1 to 3 = <b>11%</b>	Score 1 to 3 = <b>16%</b>
<b>MEAN = 4.95</b>	<b>MEAN = 4.81</b>

# Satisfaction with Other Activities



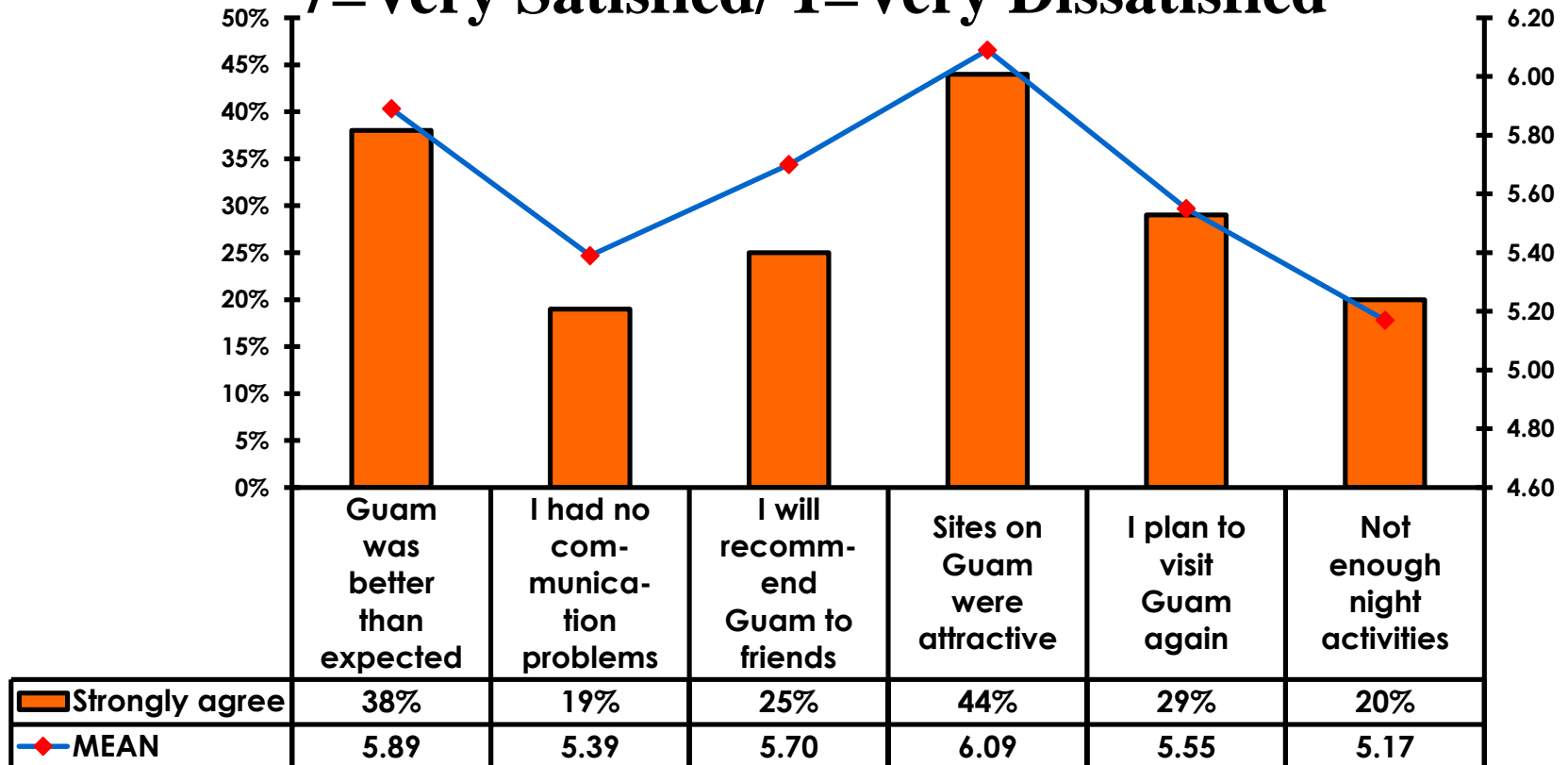
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

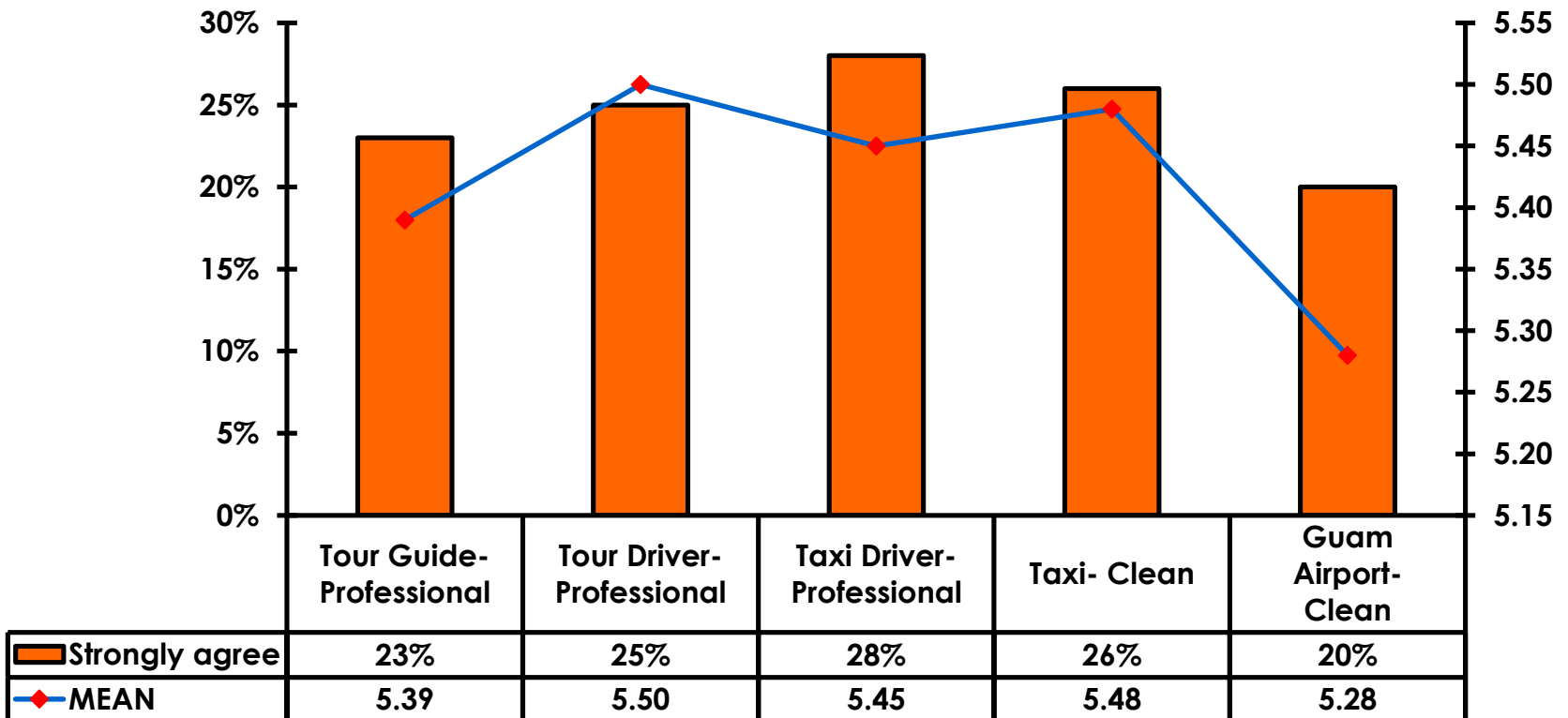
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

7pt Rating Scale

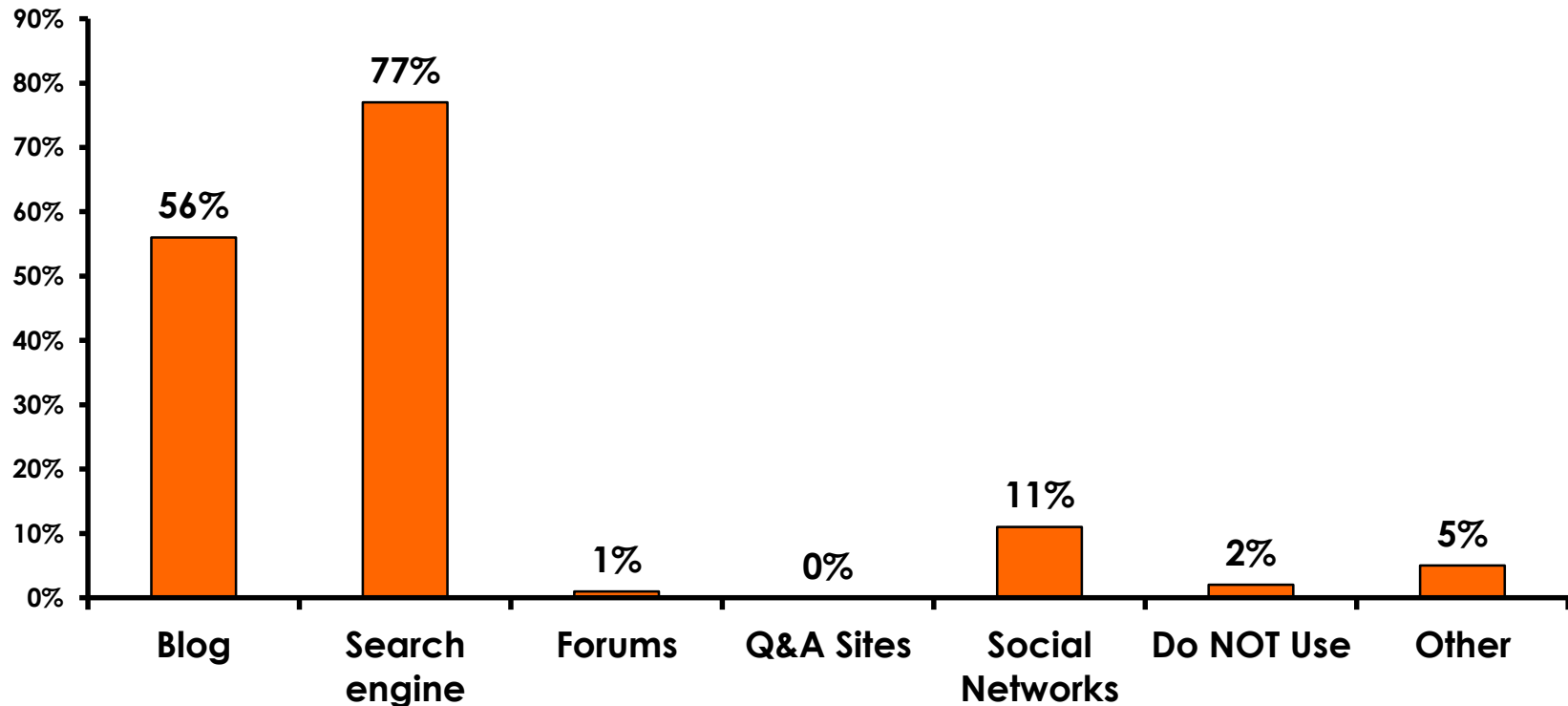
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

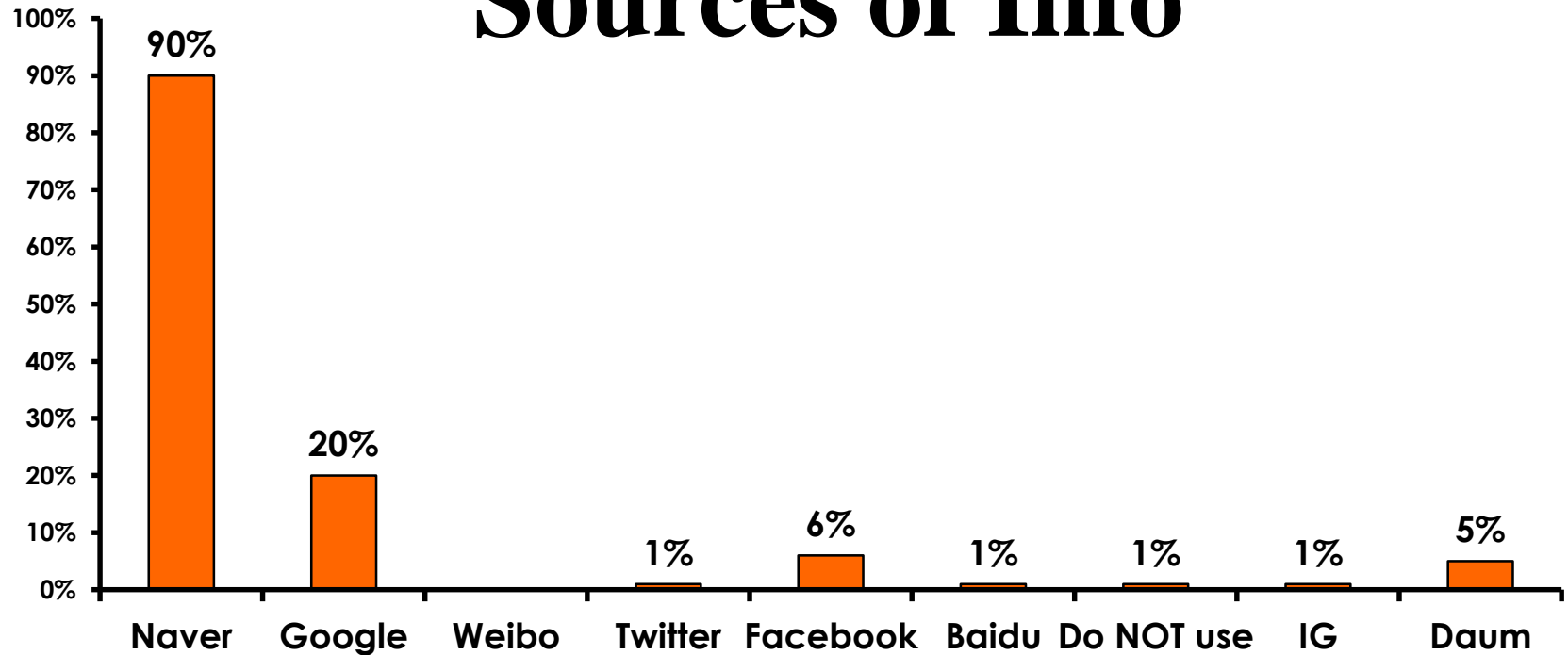


# Internet- Guam Sources of Info

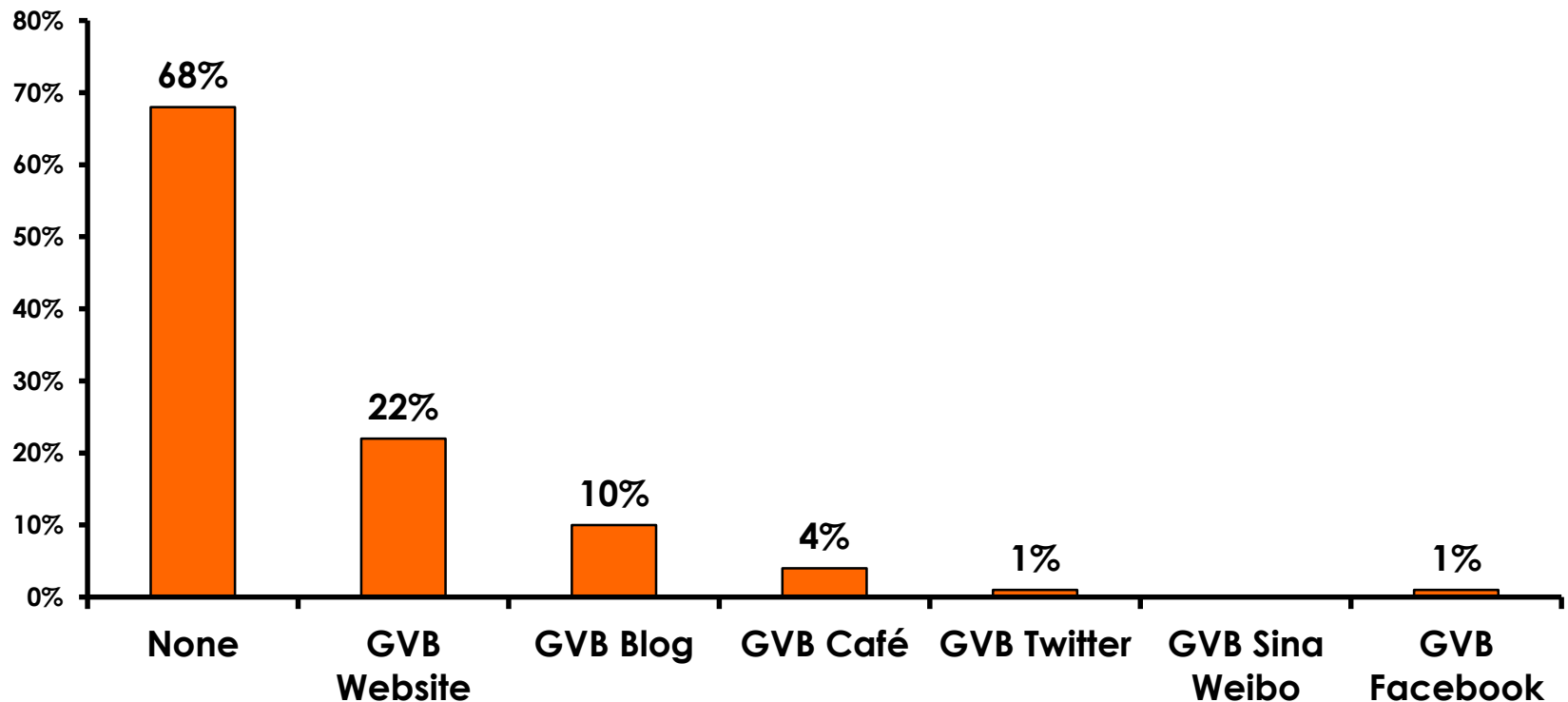


# Internet- Things To Do

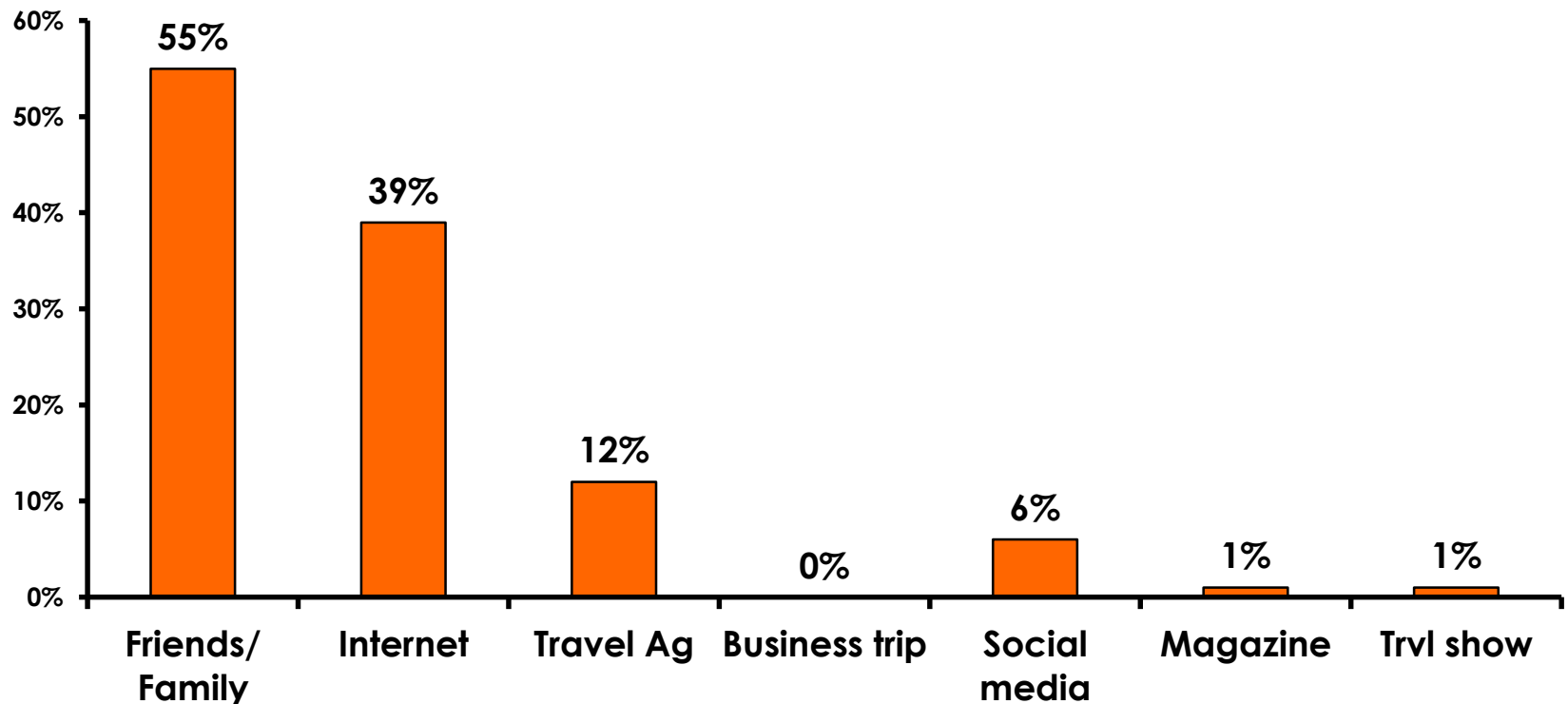
## Sources of Info



# Internet- GVB Sources

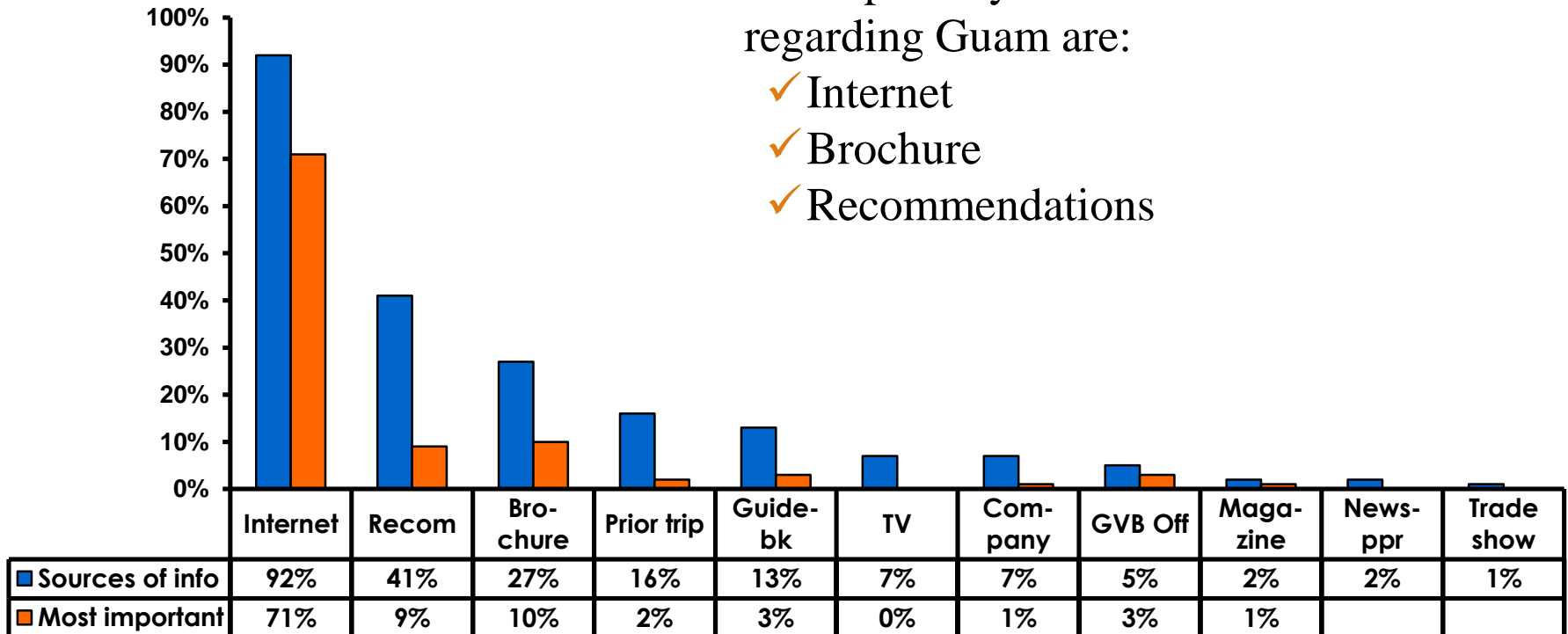


# Travel Motivation- Info Sources



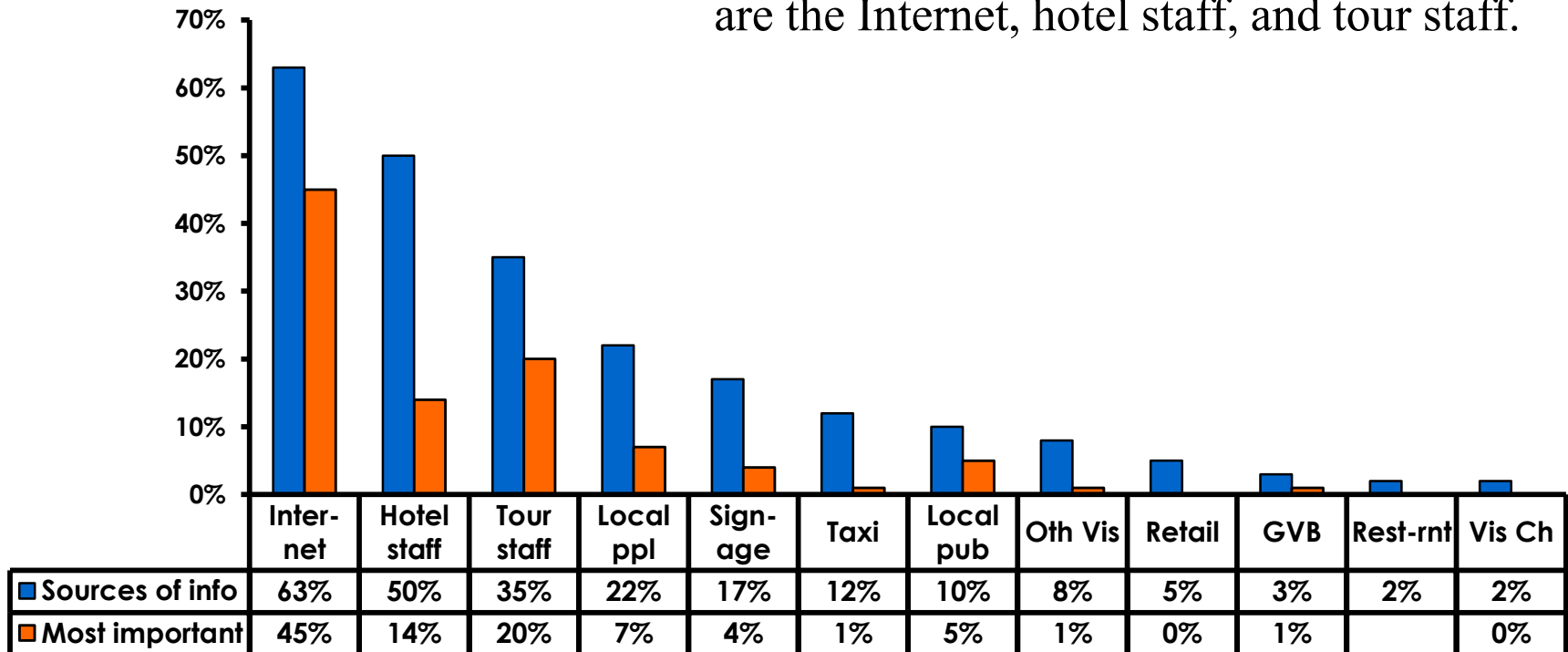
# Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Brochure
  - ✓ Recommendations



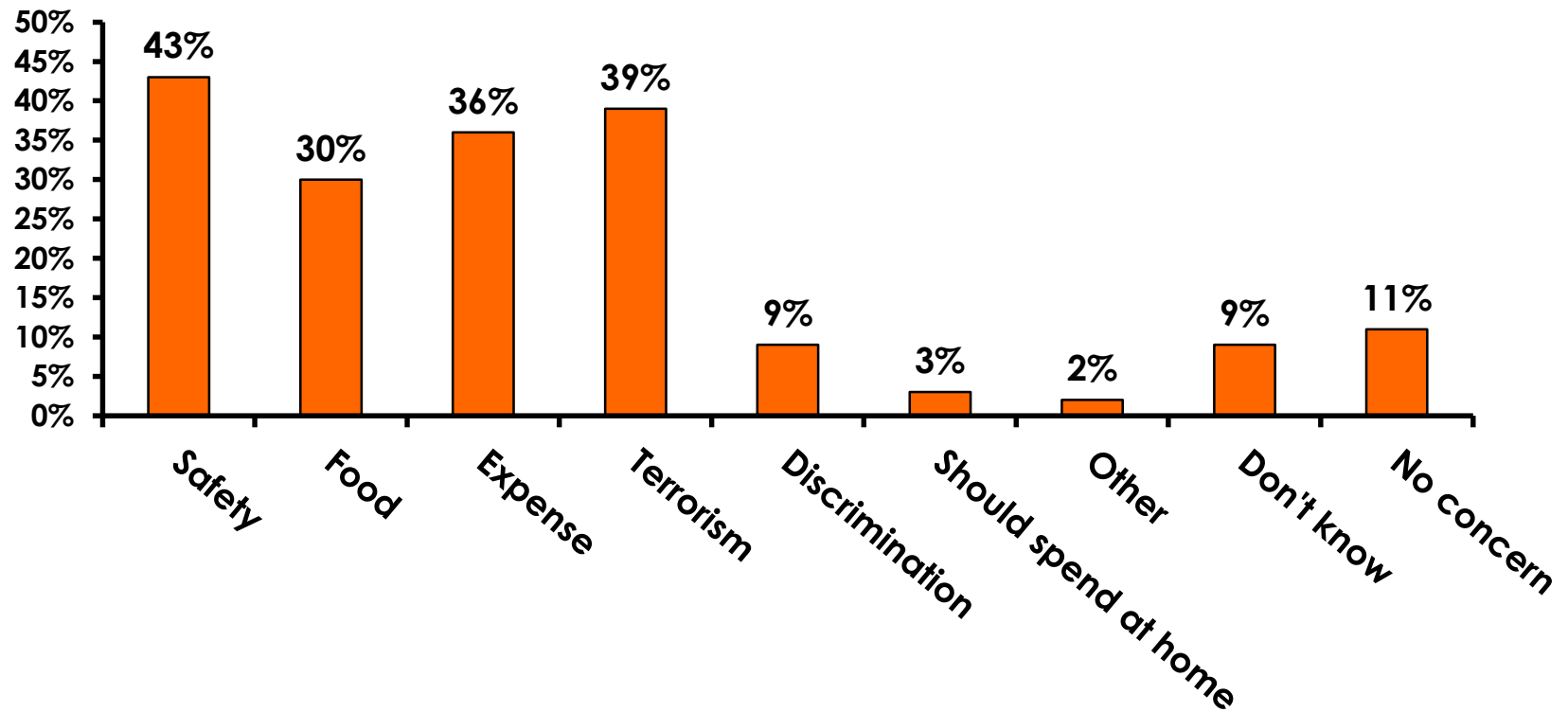
# Sources of Information Post-arrival

- The primary local sources of information are the Internet, hotel staff, and tour staff.



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Korea - Overall

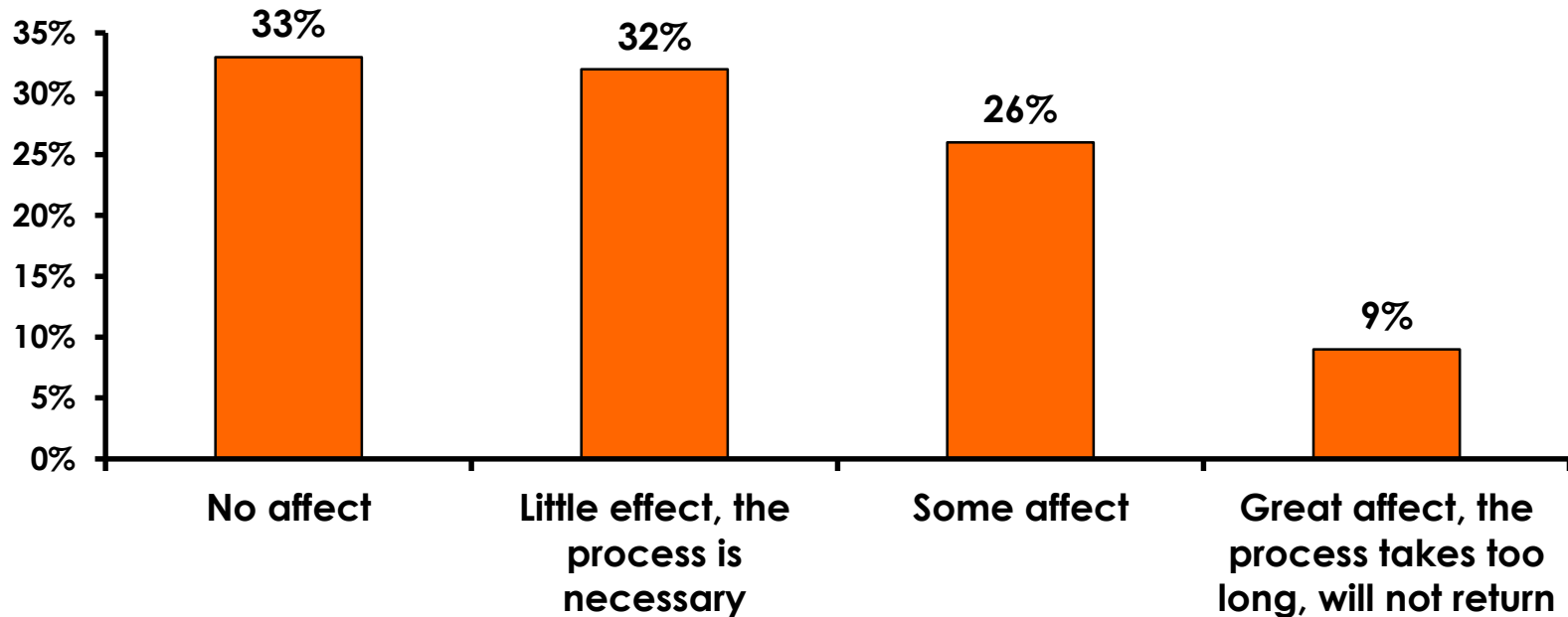




# Concerns about travel outside of Korea - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+	No Income	
Q21	Safety	43%	31%	40%	45%	73%	50%	20%	38%	42%	45%	45%	60%	33%	
	Terrorism	39%	38%	34%	43%	36%	50%	60%	41%	39%	36%	55%	59%	44%	
	Expense	36%	58%	34%	35%	27%	100%	20%	50%	36%	41%	13%	32%	44%	
	Food	30%	27%	30%	29%	45%	50%	60%	29%	24%	30%	35%	32%	33%	
	No concerns	11%	8%	13%	11%			20%	15%	9%	14%	6%	4%		
	Discrimination against Koreans	9%	15%	8%	9%	9%		20%	12%	12%	7%	6%	10%	22%	
	Don't know	9%	4%	11%	9%				3%	12%	11%	6%	3%	11%	
	Should spend at home	3%		6%	1%			20%	9%		5%	3%	3%		
	Other	2%	8%	3%	1%				12%	3%			3%		
	Total	Count	327	26	131	159	11	2	5	34	33	44	31	78	9

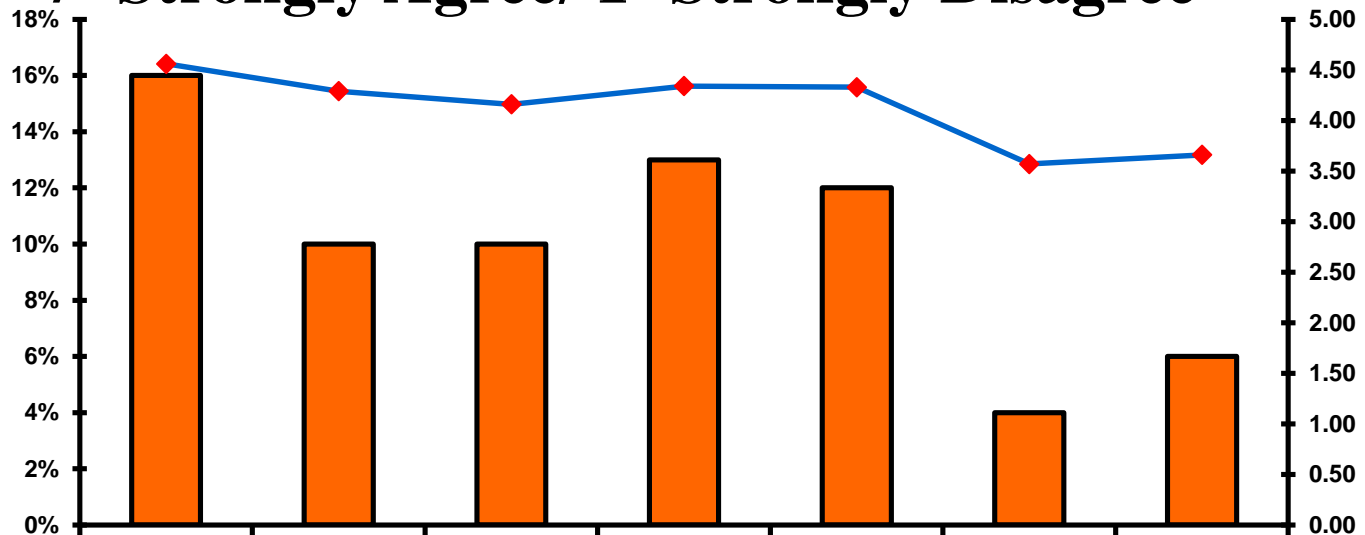
# Security Screening/ Immigration Process at Guam International Airport





# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



 Strongly agree	16%	10%	10%	13%	12%	4%	6%
 MEAN	4.56	4.29	4.16	4.34	4.33	3.57	3.66