



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **APRIL 2012**



**Prepared by: QMark Research**

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# Background & Methodology

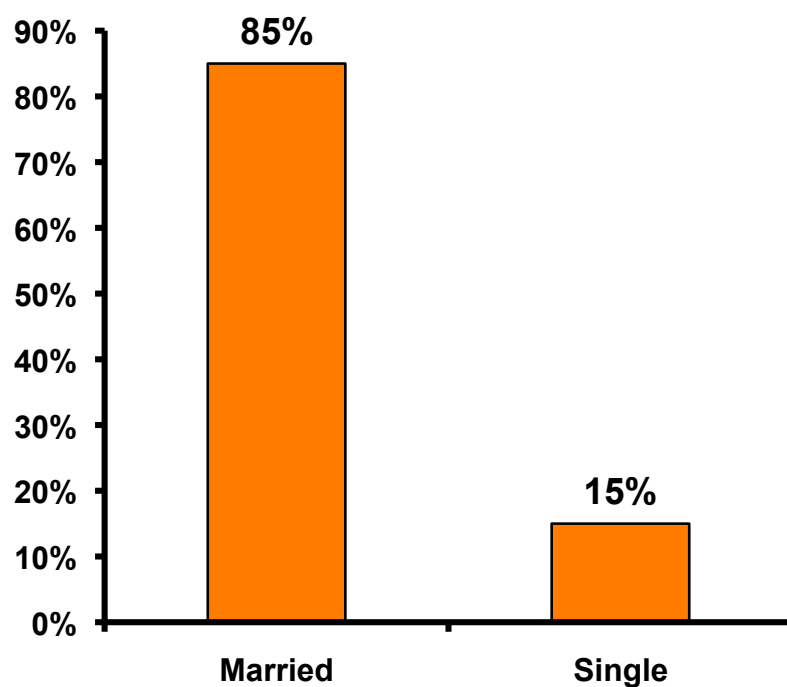
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean 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 **352** is +/- 5.2 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 +/- 5.2 percentage points.

# 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 Korean marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

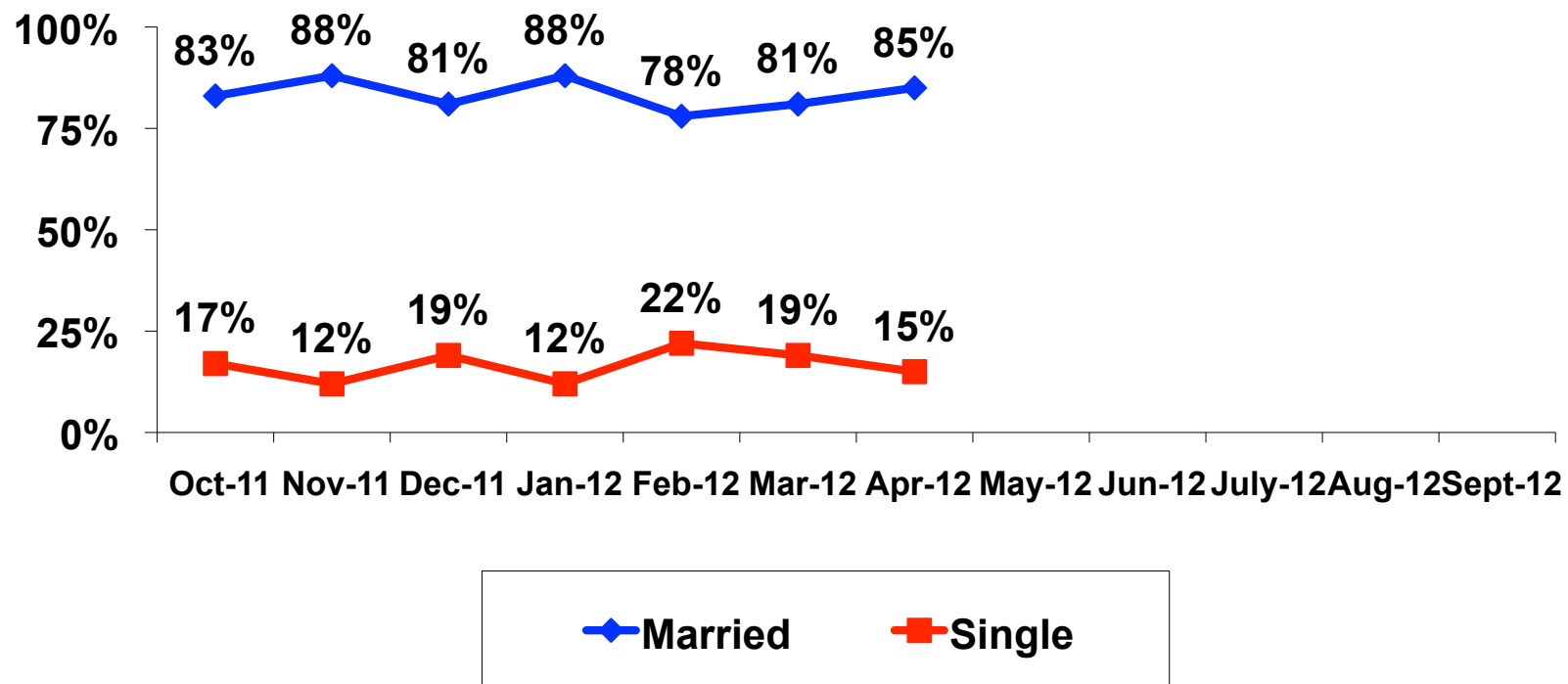
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

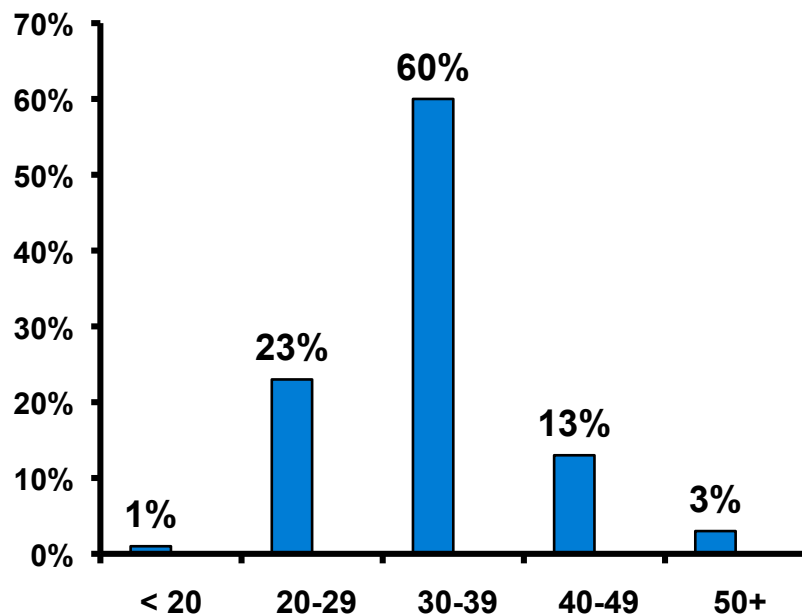


- A majority of visitors are married.

# Marital Status

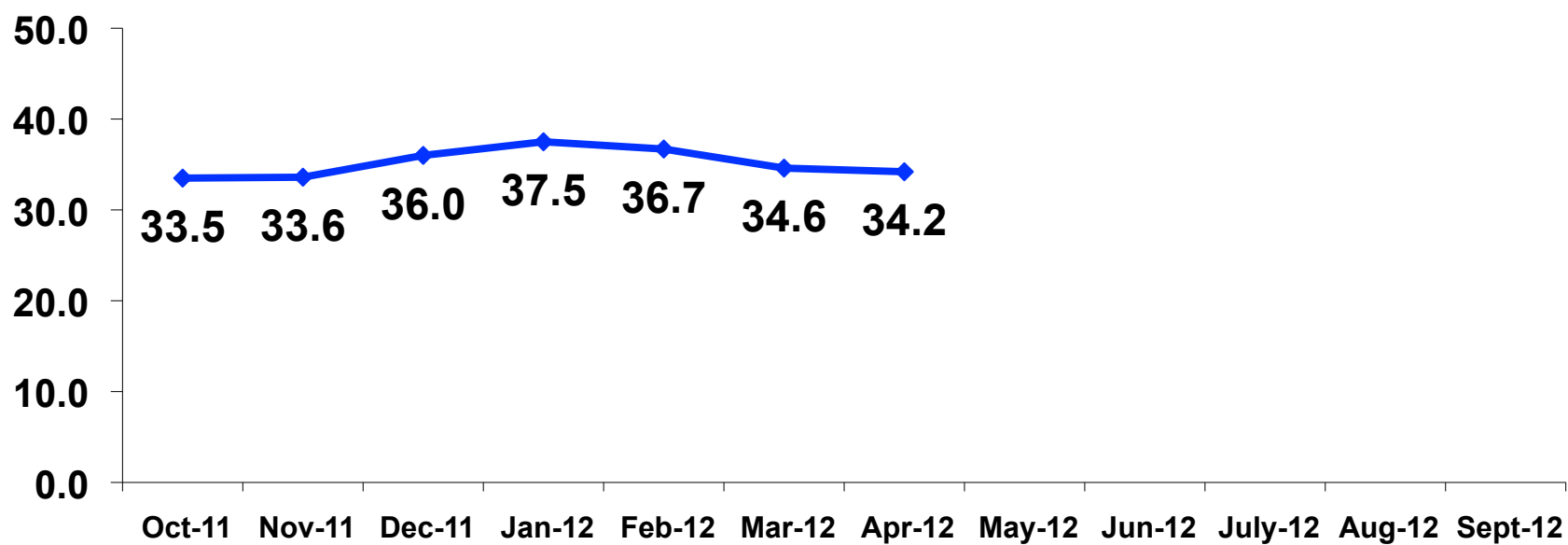


# Age - Overall



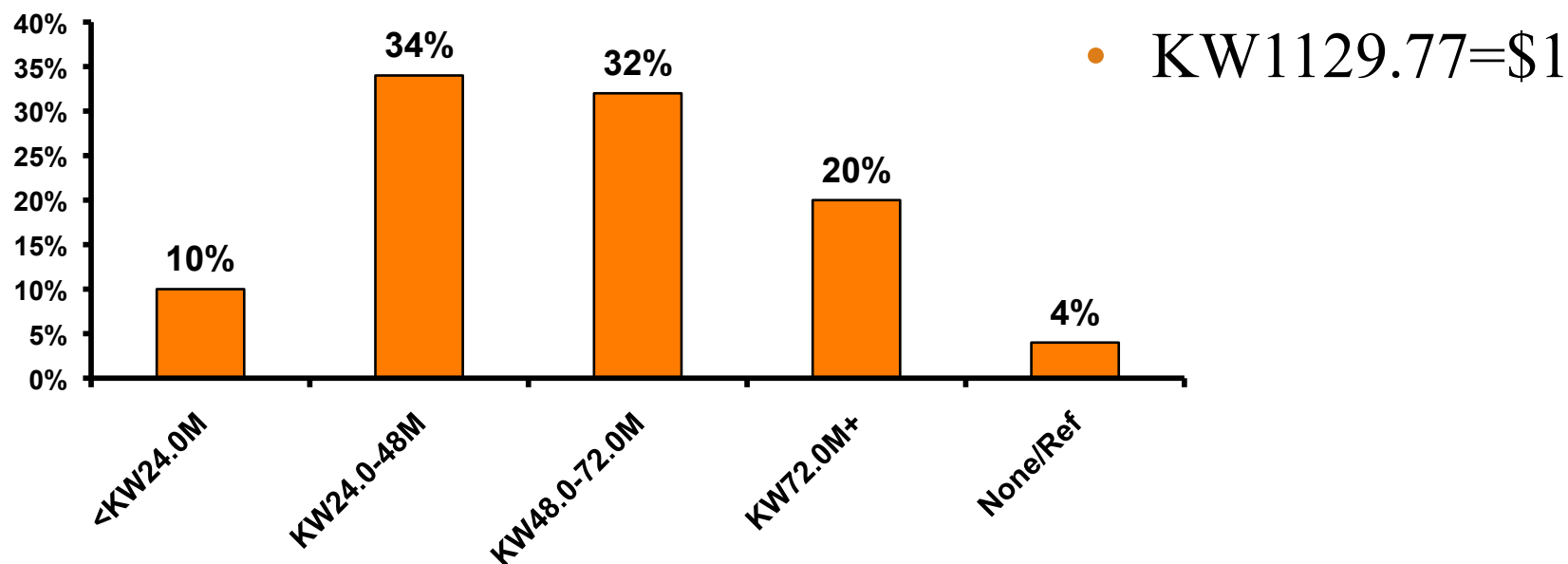
- The average age of the respondents is 34.2 years of age.

# Average Age

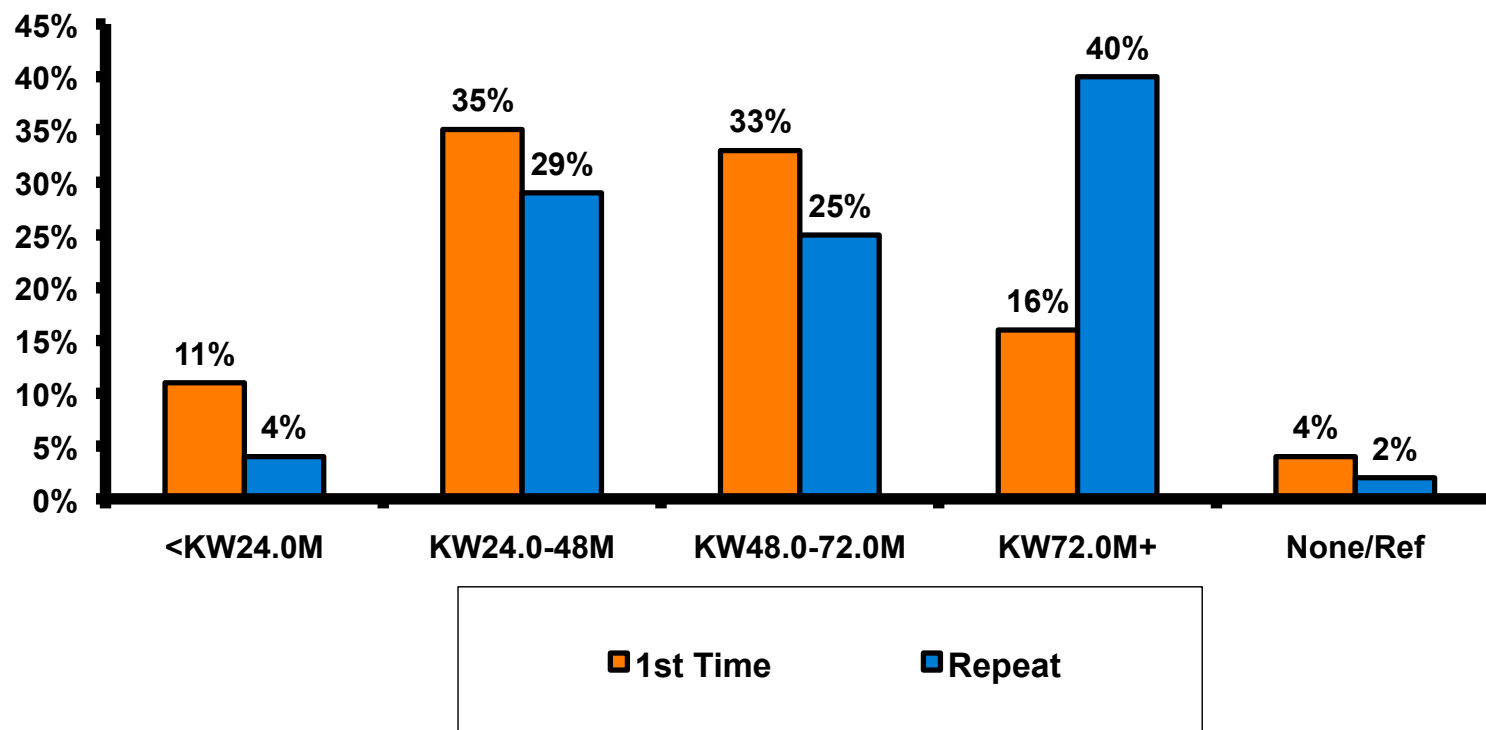




# Personal Income



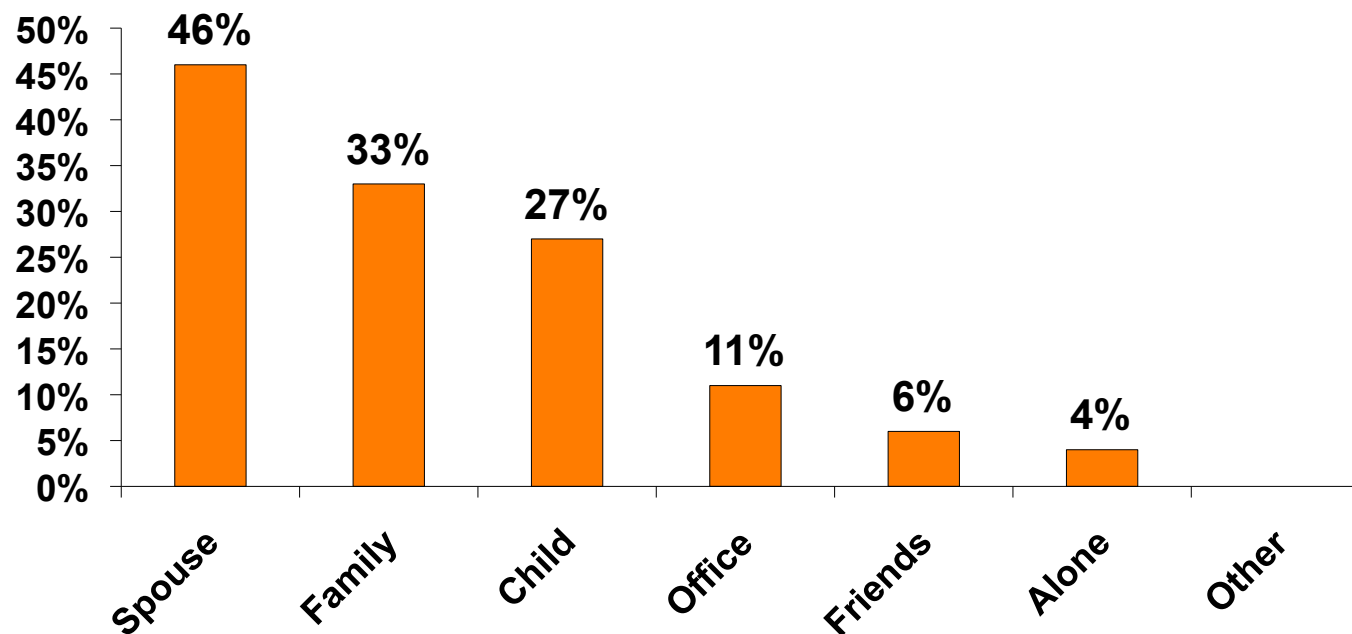
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	36	19	17		17	17	1	1
			11%	11%	10%		21%	8%	2%	10%
	KW24.0M-KW48.0M	Count	118	62	56		42	66	4	6
			35%	36%	33%		53%	32%	9%	60%
	KW48.0M-KW72.0M	Count	109	55	54		14	72	23	
			32%	32%	32%		18%	35%	51%	
	KW72.0M+	Count	67	31	36	1	4	43	17	2
			20%	18%	21%	50%	5%	21%	38%	20%
	Refused	Count	12	4	8	1	3	7		1
			4%	2%	5%	50%	4%	3%		10%
Total	Count	342	171	171	2	80	205	45	10	

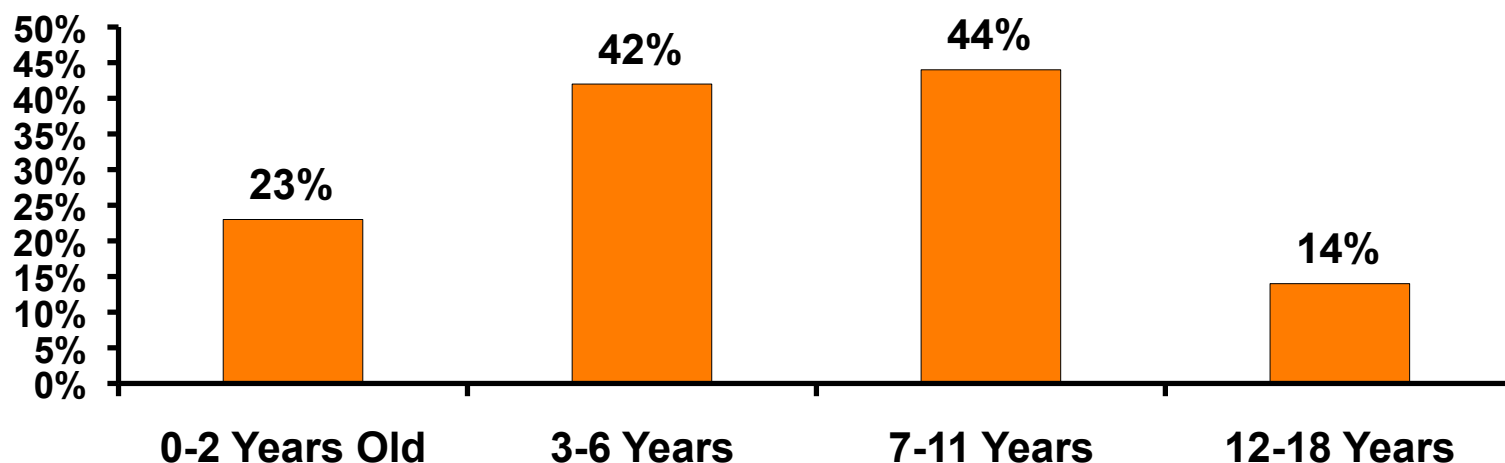
# Travel Companions



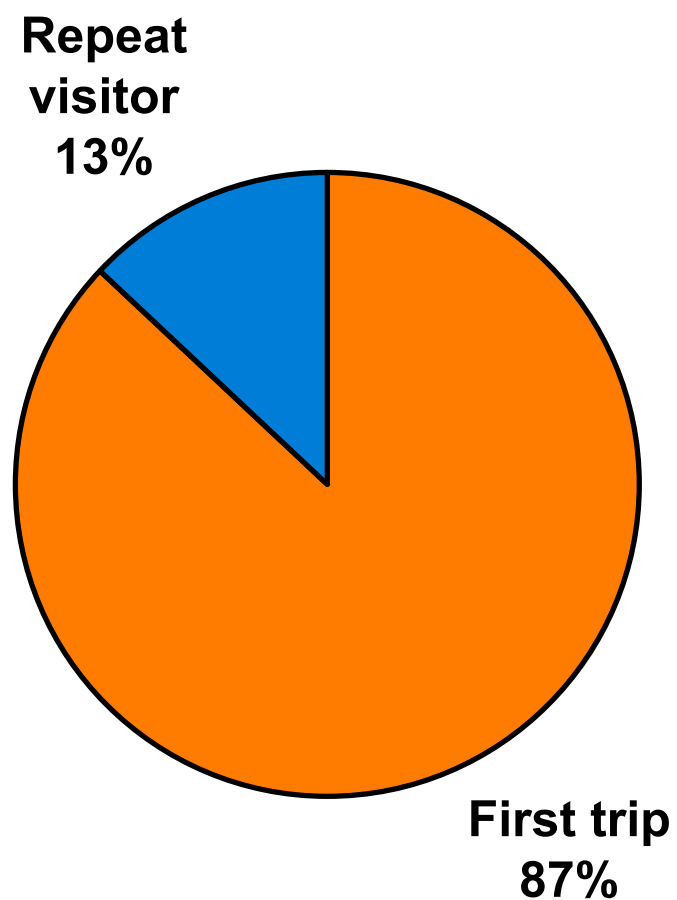
# Number of Children Travel Party

N=95 total respondents traveling with children.

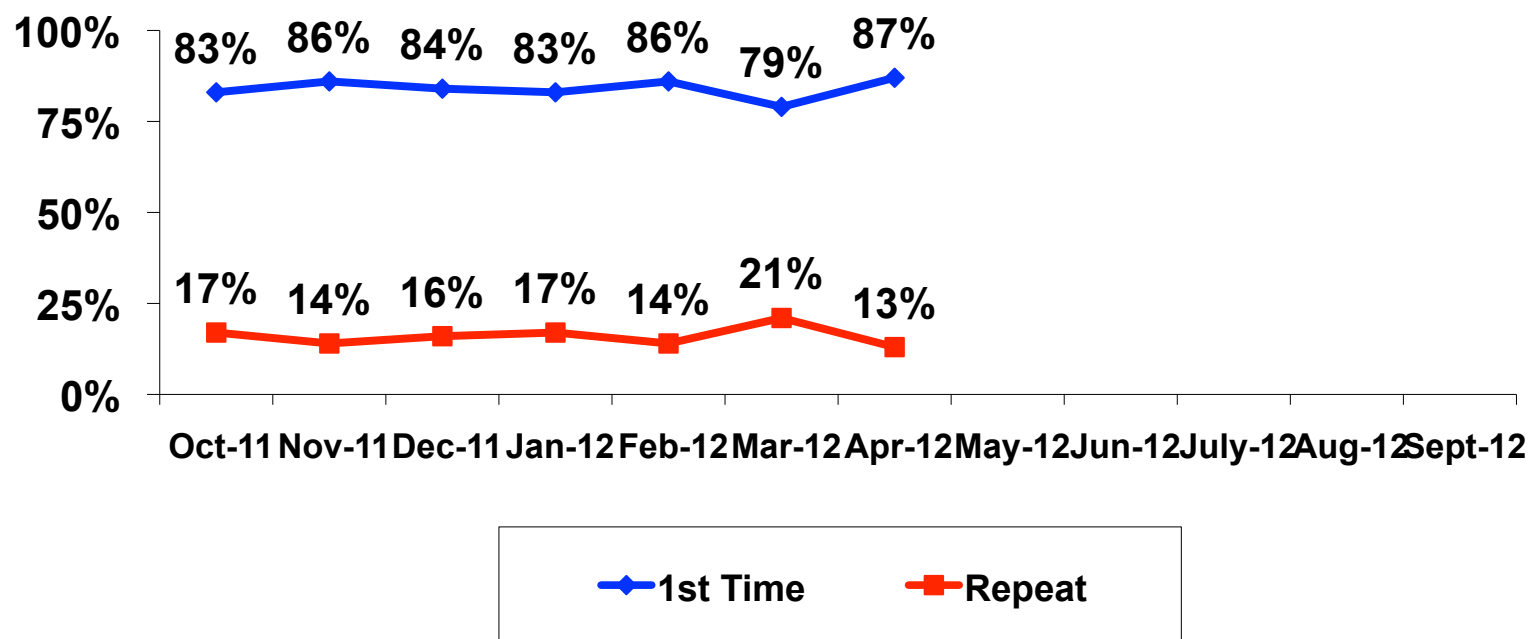
(Of those N=95 respondents, there is a total of 145 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

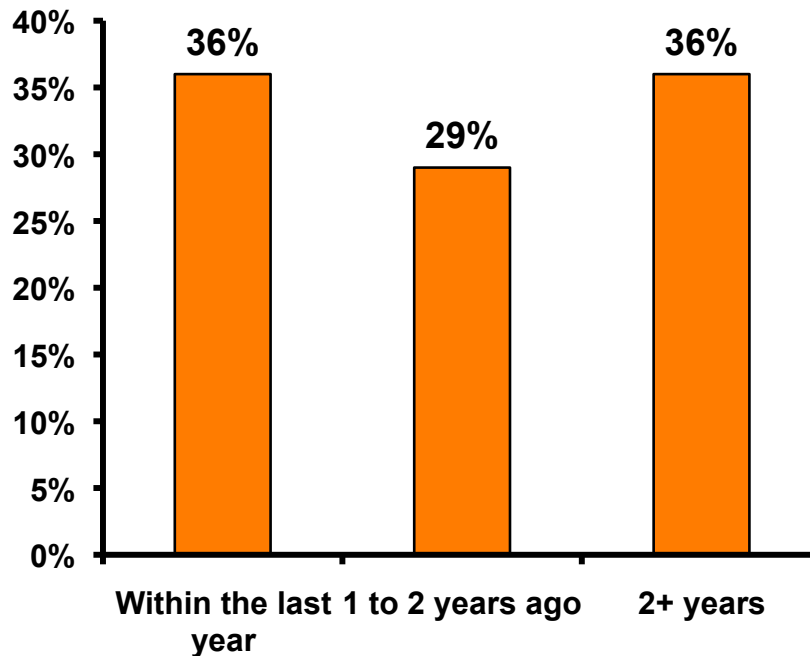
			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	174	151	21
			49%	50%	47%
	Female	Count	178	154	24
			51%	50%	53%
Total	Count		352	305	45
AGE	<20	Count	2	1	1
			1%	0%	2%
	20-29	Count	81	75	6
			23%	25%	13%
	30-39	Count	212	180	30
			60%	59%	67%
	40-49	Count	45	38	7
			13%	12%	16%
	50+	Count	12	11	1
			3%	4%	2%
Total	Count		352	305	45

- First-time visitors tend to be younger than repeat visitors to Guam.



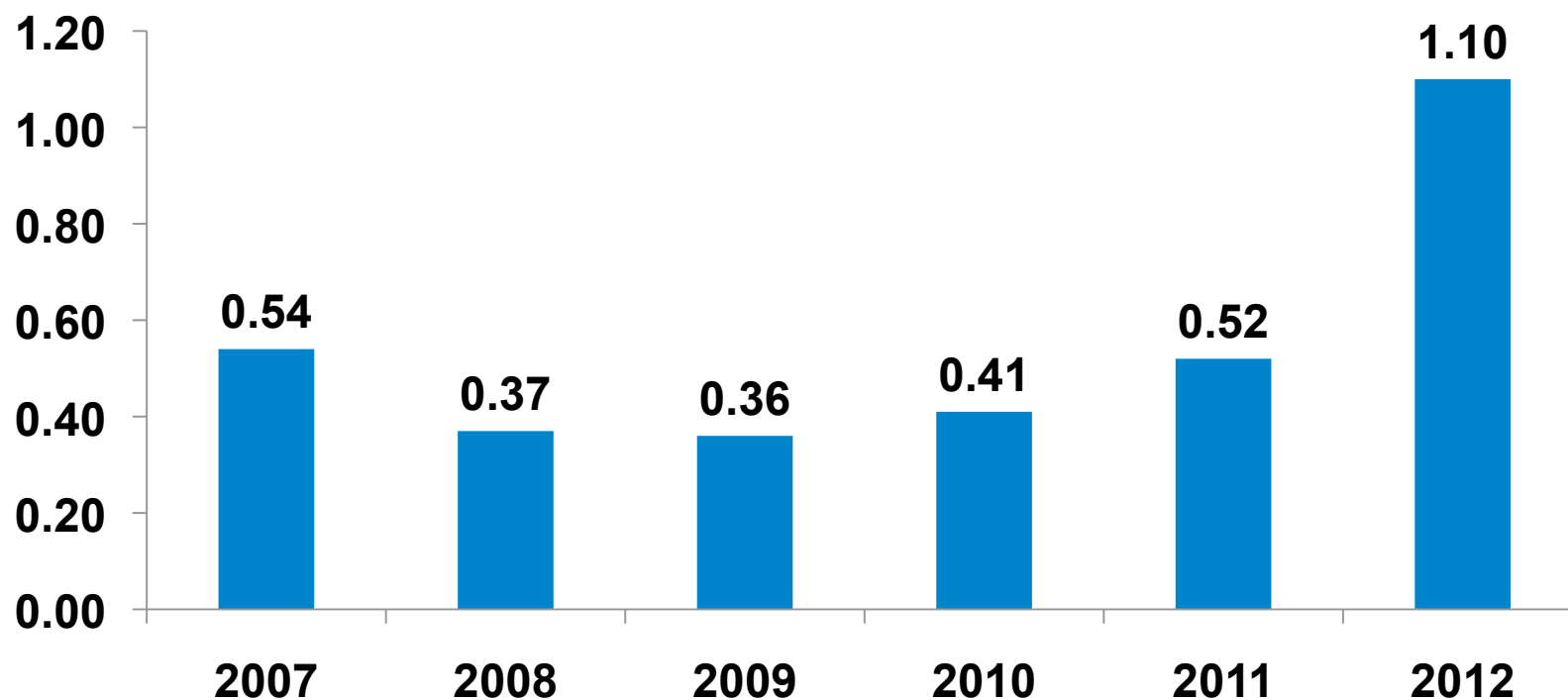
# Repeat Visitors Last Trip

n = 45



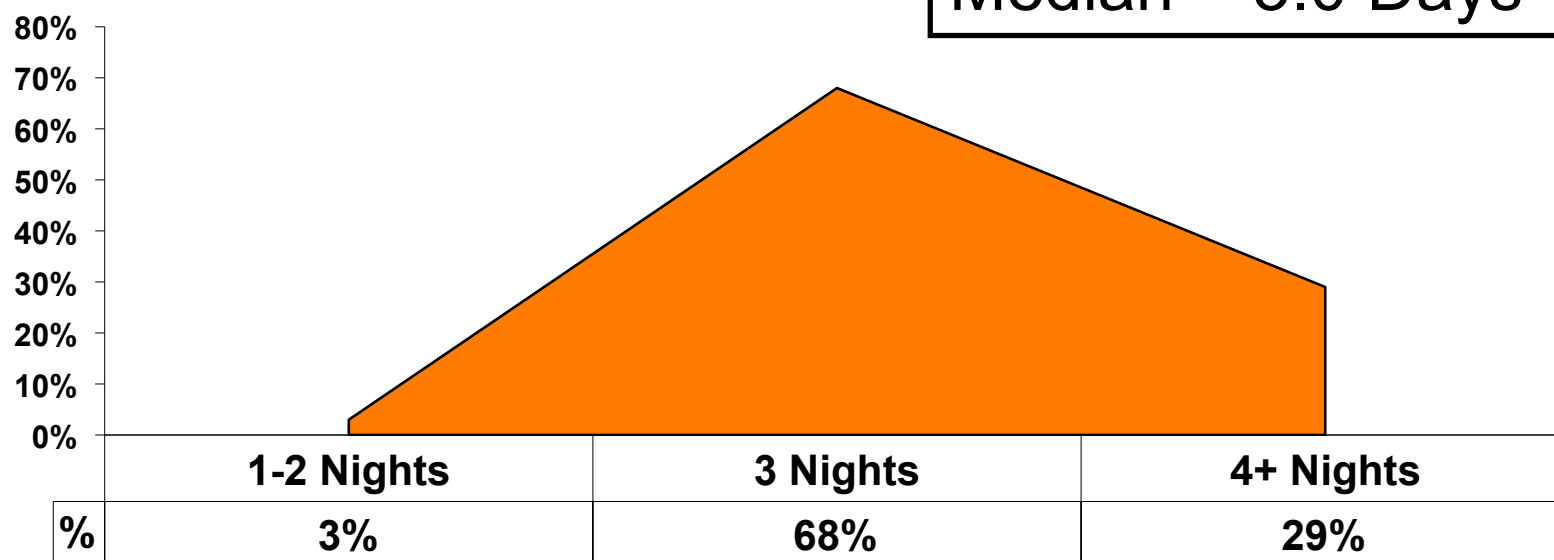
- The average repeat visitor has been to Guam 2.7 times.
- Two-thirds of the repeat visitors have been to Guam within the last 2 years.

## Average Number Overnight Trips (2006-2012) (2 nights or more)

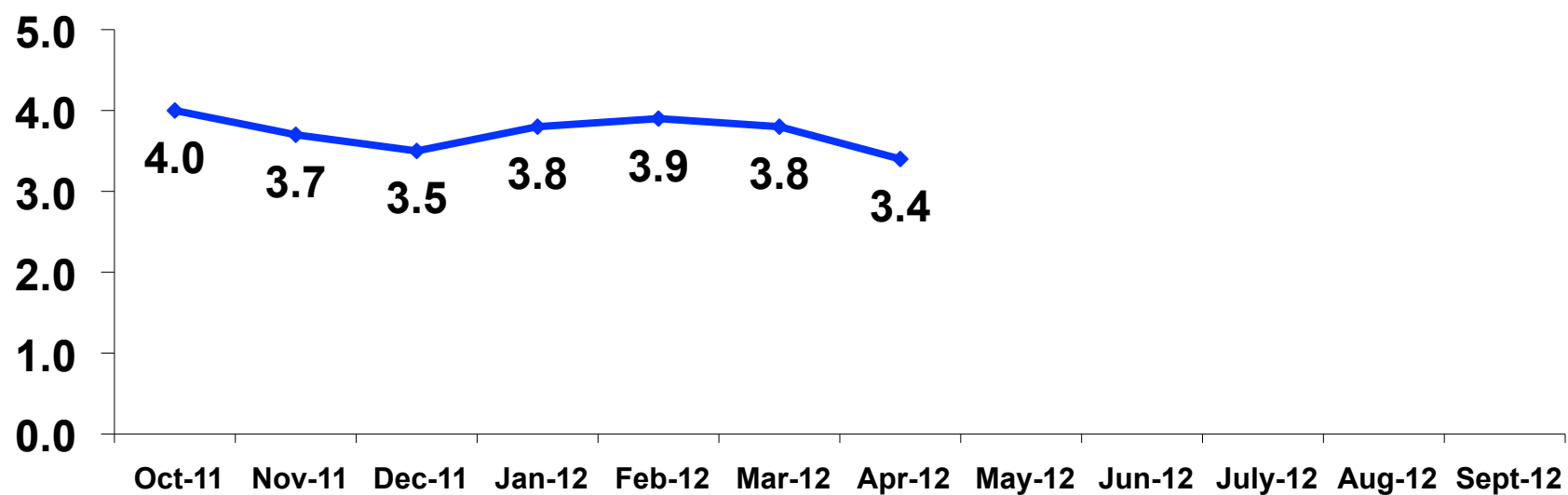


# Length of Stay

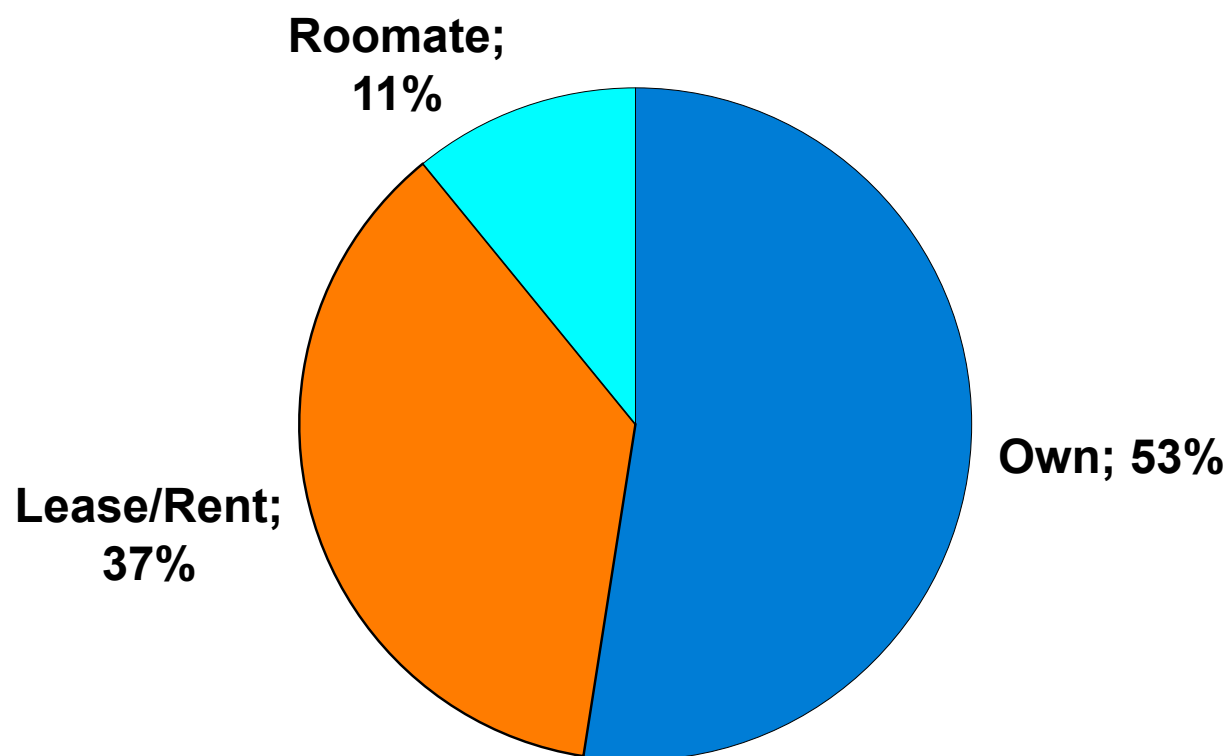
Mean = 3.40 Days  
Median = 3.0 Days



# Average Length of Stay



# Living Accommodations

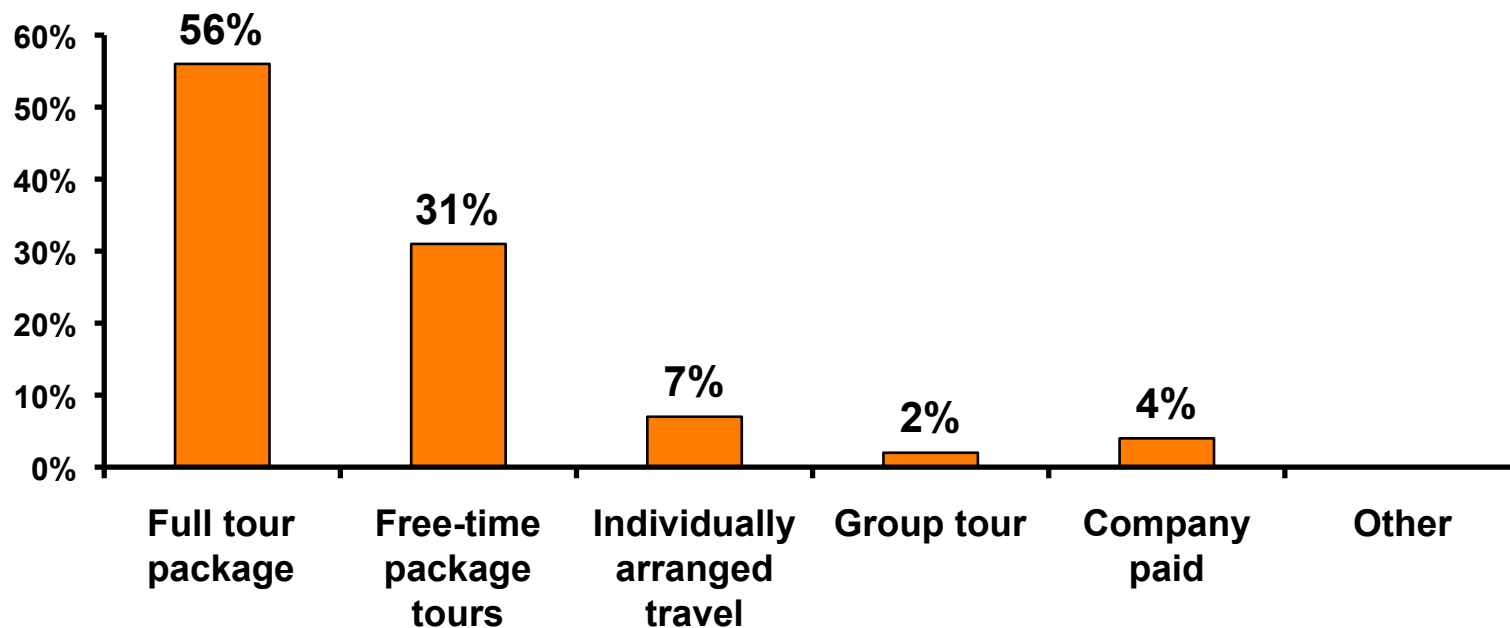


# Occupation by Income

		TOTAL	PERSONAL INCOME					Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+		
Q.29	White Collar-Office	37%	31%	38%	41%	36%		
	Self-employed	13%	19%	6%	16%	19%	25%	
	Homemaker	13%	11%	6%	13%	19%	33%	
	Prof/Specialist/Tech	13%	17%	14%	10%	13%		
	Professor/Teacher	5%	6%	8%	5%	1%		
	Skilled worker	5%	6%	9%	4%			
	Service worker	2%		3%	4%	1%		
	Unemployed	2%		2%		1%	33%	
	Manager	2%		3%	2%	1%		
	Govt-Exec	2%	3%	2%	2%	1%		
	Student	1%	6%	1%		1%	8%	
	Govt - Office/non-mgr	1%		3%				
	Govt-Mgr	1%	3%		3%			
	Other	1%		2%		3%		
	Sales/Clerical	1%		1%	2%			
	Free-lancer	1%		3%				
	Retired	0%		1%				
Total	Count	351	36	118	109	67	12	

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



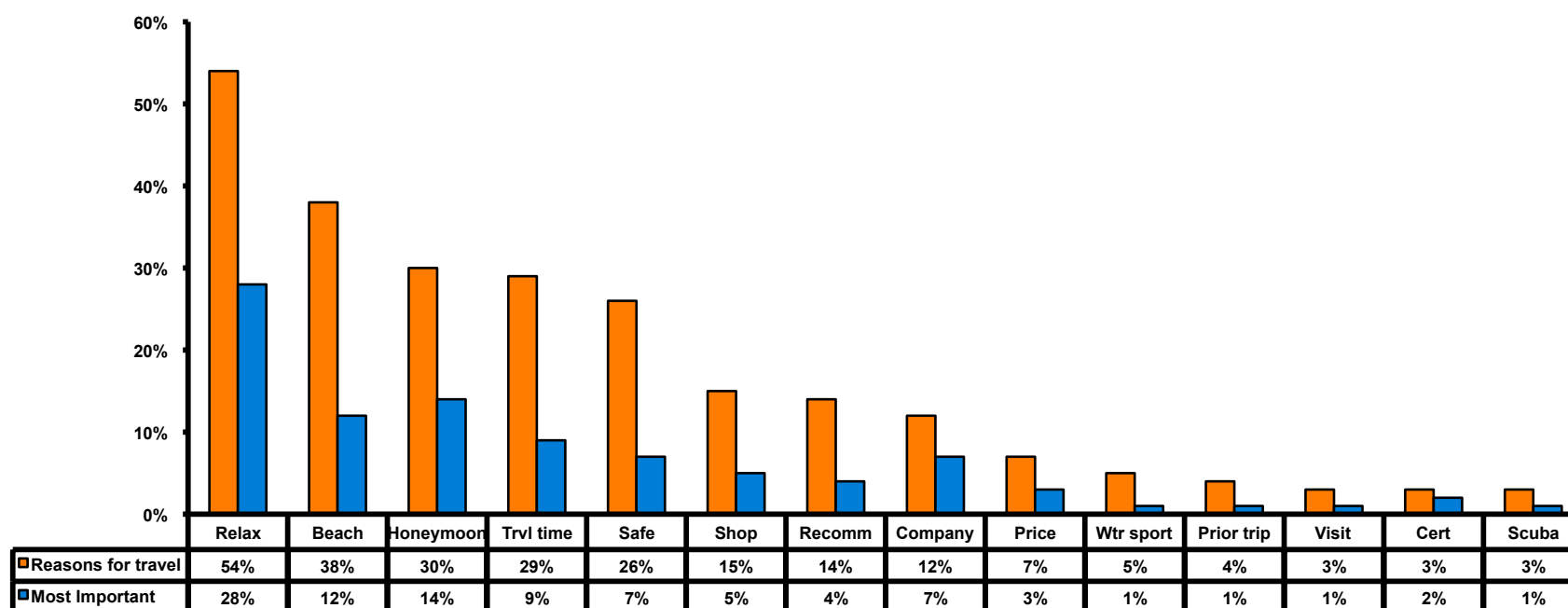


# Accommodation by Income

Average length of stay: 3.40 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	47%	33%	42%	51%	63%	17%
	Hyatt Regency Guam	20%	28%	22%	21%	12%	25%
	Sheraton Laguna Resort	7%	8%	9%	5%	1%	25%
	Outrigger Guam Resort	4%	11%	4%	3%	4%	
	The Westin Resort Guam	4%		2%	7%	6%	
	Hotel Nikko Guam	5%		3%	6%	4%	
	Onward Beach Resort	2%	6%	2%	3%		
	Holiday Resort Guam	2%	3%	3%		3%	
	Hilton Guam Resort & Spa	2%	6%	2%	1%	1%	8%
	Relatives, Friends, Home Stay	1%	3%			1%	25%
	Leo Palace Resort	1%		3%		1%	
	Fiesta Resort Guam	1%		2%	1%	1%	
	Royal Orchid Guam	1%	3%	2%			
	Pacific Bay Hotel	1%			2%		
	Guam Aurora Resort Villa & Spa	0%		1%			
	Oceanview Hotel	0%			1%		
	Japan Plaza Hotel	0%		1%			
	Condominium	0%		1%			
	Other	0%		1%			
	Days Inn Tamuning	0%		1%			
Total	Count	350	36	117	108	67	12

# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

- The desire to relax,
  - Honeymoon and
  - Guam's natural beauty/ beaches
- are the three reasons mentioned most often as the most important reason for this particular trip.

# Motivation by Age & Gender

		TOTAL	AGE					GENDER	
			<20	20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	54%	50%	36%	58%	69%	50%	52%	56%
	Beautiful seas, beaches, tropical climate	38%		28%	40%	44%	50%	33%	42%
	Honeymoon	30%		49%	31%	2%		33%	28%
	Short travel time	29%		25%	32%	31%	8%	24%	34%
	It is a safe place to spend a vacation	26%		20%	27%	29%	25%	23%	28%
	Shopping	15%		15%	17%	9%		13%	17%
	Recommendation of friend, relative, travel agency	14%	50%	10%	13%	24%	8%	15%	12%
	My company sponsored me	12%		20%	8%	9%	25%	12%	11%
	Price of the tour package	7%		11%	7%	7%		5%	10%
	Pleasure	7%	50%	5%	5%	16%	8%	9%	4%
	Water sports	5%		4%	4%	11%	8%	6%	3%
	A previous visit	4%		1%	5%	7%		5%	4%
	To visit friends or relatives	3%	50%	5%	2%	2%	8%	4%	2%
	Career certification or testing	3%		4%	3%			3%	2%
	SCUBA diving	3%		1%	3%	2%	8%	4%	1%
	Company or Business trip	2%		1%	0%	7%	8%	1%	2%
	To get married or Attend wedding	2%		2%	1%	2%		2%	2%
	To golf	1%		1%	1%		8%	2%	1%
	Other	1%		2%	0%			1%	1%
	Convention, Conference, Trade show	0%		1%				1%	
	Organized Sporting Activity	0%			0%			1%	
Total	Cases	352	2	81	212	45	12	174	178

# Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	54%	36%	42%	64%	64%	58%
	Beautiful seas, beaches, tropical climate	38%	22%	33%	44%	52%	8%
	Honeymoon	30%	67%	38%	26%	4%	42%
	Short travel time	29%	22%	20%	31%	46%	25%
	It is a safe place to spend a vacation	26%	25%	22%	32%	27%	8%
	Shopping	15%	6%	9%	17%	25%	17%
	Recommendation of friend, relative, travel agency	14%	8%	12%	16%	16%	25%
	My company sponsored me	12%	8%	15%	11%	9%	8%
	Price of the tour package	7%	8%	8%	7%	3%	8%
	Pleasure	7%		6%	10%	7%	
	Water sports	5%		6%	6%	6%	
	A previous visit	4%	3%	3%	4%	10%	
	To visit friends or relatives	3%	6%	4%	2%		17%
	Career certification or testing	3%		4%	1%	6%	
	SCUBA diving	3%		3%	3%	3%	
	Company or Business trip	2%		2%	3%	1%	
	To get married or Attend wedding	2%	3%	2%	2%	1%	
	To golf	1%		3%	1%	1%	
	Other	1%		2%		1%	
	Convention, Conference, Trade show	0%	3%				
	Organized Sporting Activity	0%			1%		
Total	Cases	352	36	118	109	67	12

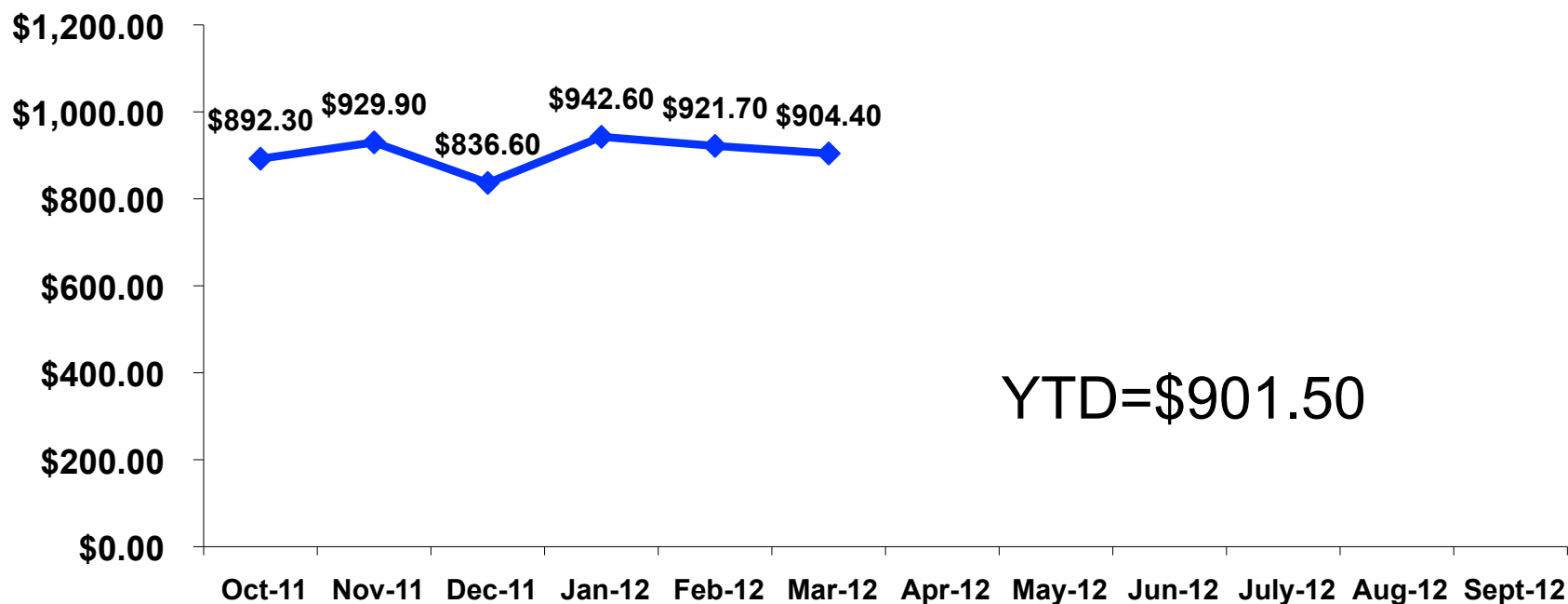
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

KW1129.77/US\$1

- \$1,942.60 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$12,391 = maximum (highest amount recorded for the entire sample)
- \$883.00 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person





# **Breakdown of Prepaid Expenditures**

**KW1129.77=\$1**

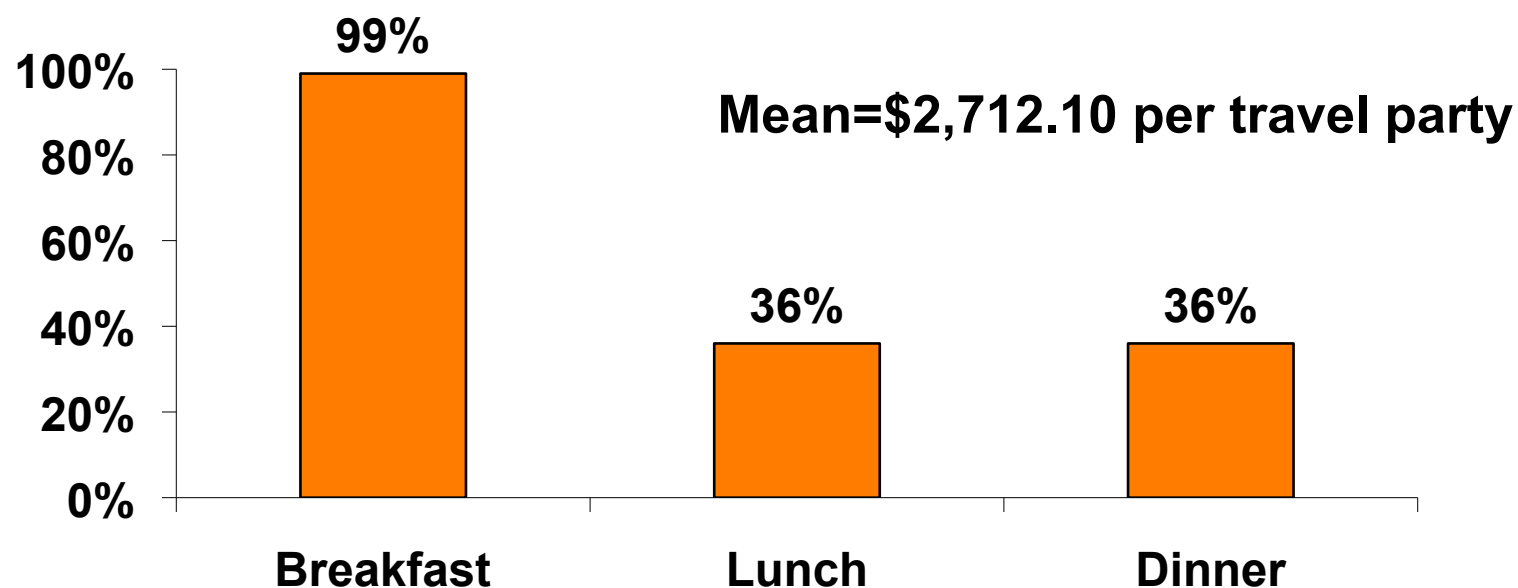
**(Filter: Only those who responded)**

	MEAN \$
Air & Accommodation package only	\$1,950.10
Air & Accommodation w/ daily meal package	\$2,712.10
Air only	\$951.50
Accommodation only	\$650.60
Accommodation w/ daily meal only	\$479.40
Food & Beverages in Hotel	-
Ground transportation - Korea	\$84.60
Ground transportation - Guam	\$106.20
Optional tours/ activities	\$354.10
Other expenses	\$321.30
Total Prepaid	\$1,942.60

# Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

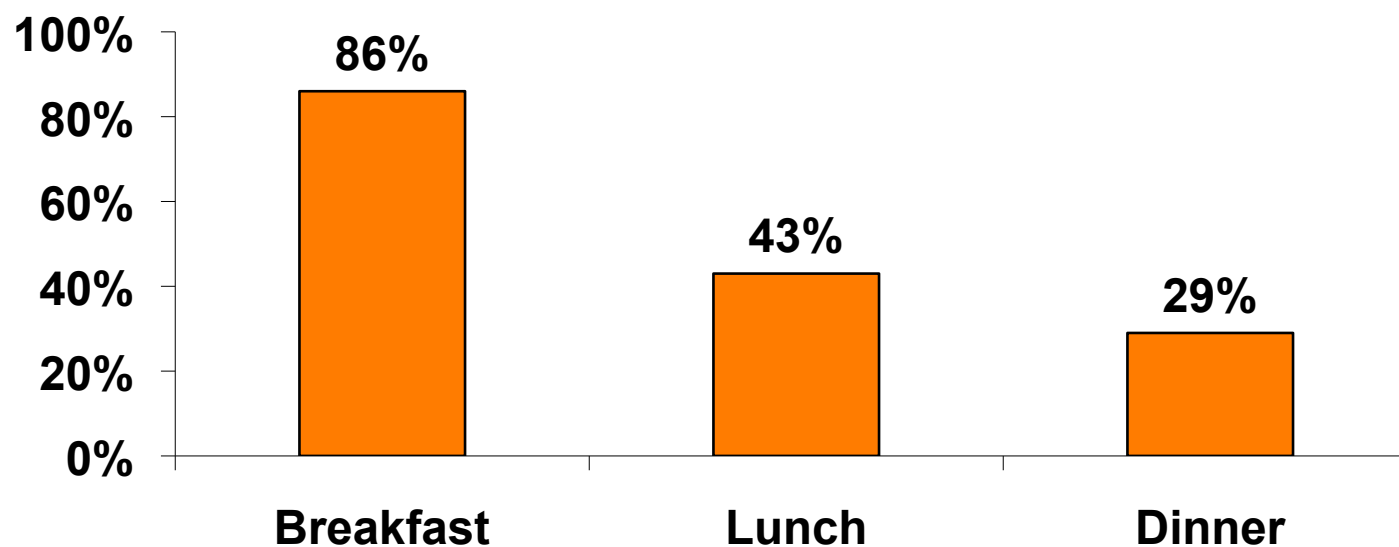
n=181



# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

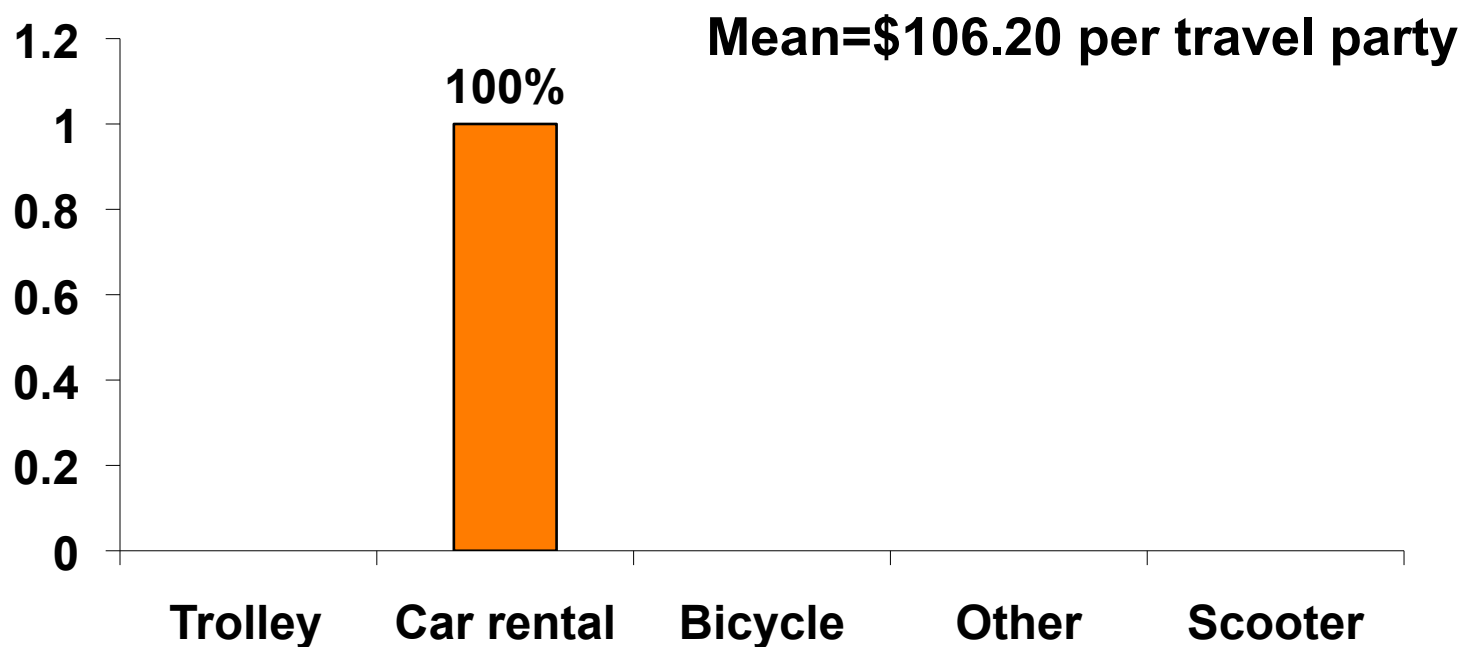
n= 7



Mean= \$479.40 per travel party

# Prepaid Ground Transportation

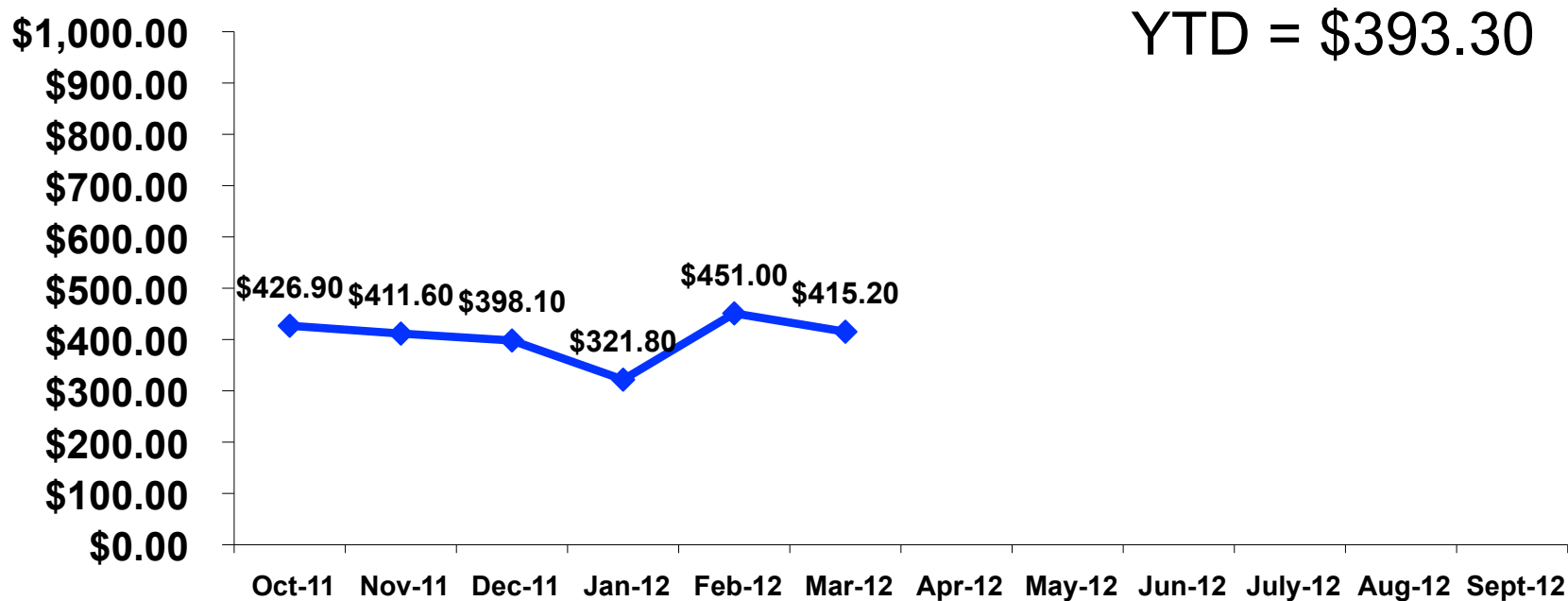
N=1



# On-Island Expenditures

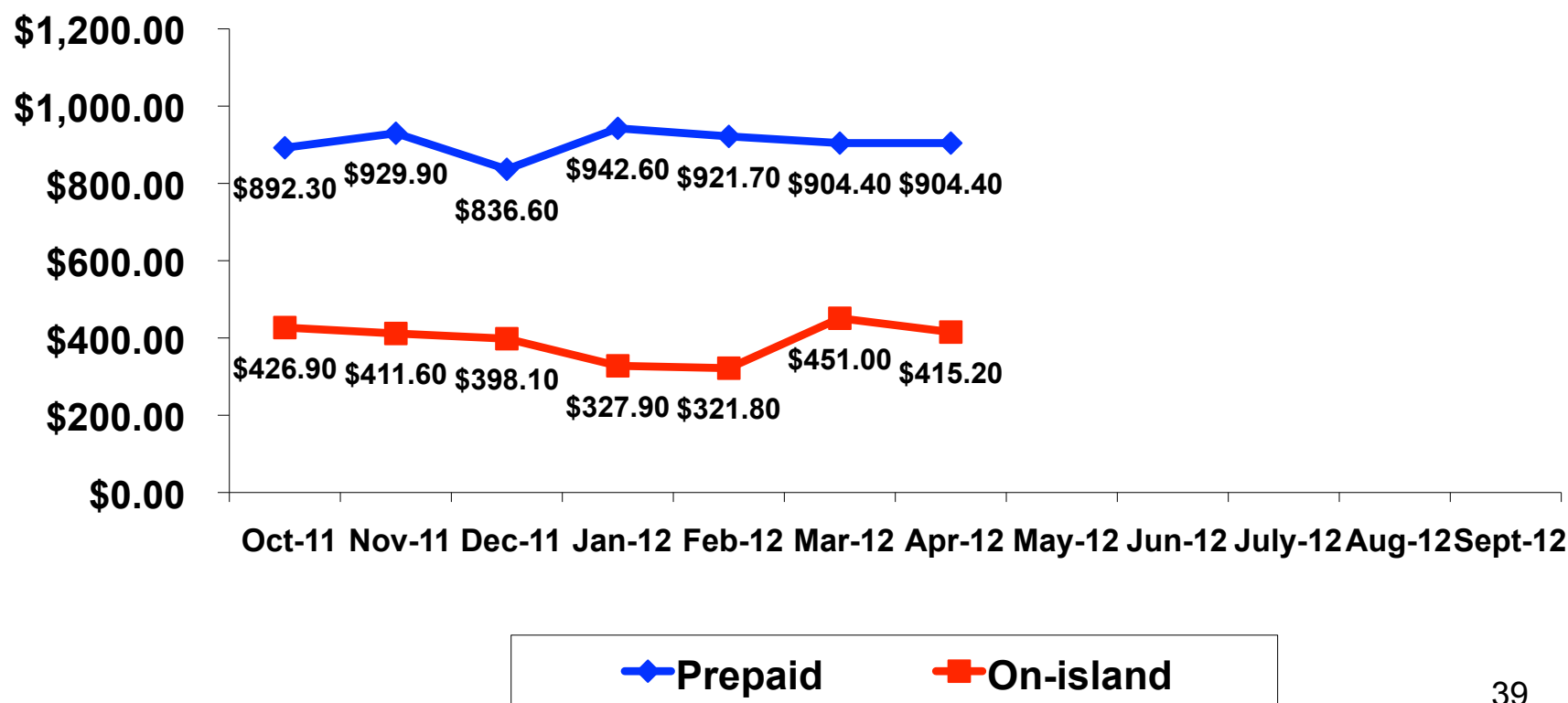
- \$846.10 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,500 = Maximum (highest amount recorded for the entire sample)
- \$415.20 = overall mean average per person on-island expenditure

# On-Island Expenditures Per Person



# Prepaid / On-Island Expenditures Per Person

Prepaid YTD=\$901.50 • On-Island YTD = \$393.30



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
					Male					Female			
					AGE					AGE			
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49	50--
Q.11A	Mean	\$846.08	\$910.33	\$783.29	\$575.00	\$1,060.41	\$853.80	\$985.14	\$850.00	\$843.61	\$828.71	\$386.56	\$480.40
	Median	\$500	\$600	\$500	\$575	\$655	\$600	\$450	\$450	\$500	\$500	\$296	\$150



# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$52.08	\$52.60	\$51.58	\$25.00	\$27.89	\$54.09	\$85.93	\$57.50
	Median	\$0	\$0	\$0	\$25	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$25.42	\$22.14	\$28.62	\$25.00	\$28.83	\$24.69	\$28.82	\$2.50
	Median	\$0	\$0	\$0	\$25	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$36.42	\$34.08	\$38.70	\$15.00	\$17.93	\$43.93	\$44.96	\$0.00
	Median	\$0	\$0	\$0	\$15	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$101.95	\$125.57	\$78.85	\$7.50	\$102.80	\$91.59	\$98.11	\$309.17
	Median	\$0	\$0	\$0	\$8	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$215.01	\$219.18	\$210.94	\$0.00	\$246.48	\$219.36	\$193.24	\$43.33
	Median	\$0	\$0	\$0	\$0	\$10	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$104.38	\$102.75	\$105.97	\$2.50	\$115.75	\$101.74	\$122.04	\$25.00
	Median	\$0	\$0	\$0	\$3	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$17.24	\$15.67	\$18.78	\$0.00	\$11.38	\$21.54	\$9.33	\$13.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$293.04	\$335.17	\$251.87	\$500.00	\$377.10	\$283.59	\$189.87	\$245.17
	Median	\$5	\$8	\$5	\$500	\$0	\$10	\$15	\$115
TOTAL ON ISLAND	Mean	\$846.08	\$910.33	\$783.29	\$575.00	\$929.26	\$841.02	\$772.31	\$696.00
	Median	\$500	\$600	\$500	\$575	\$600	\$564	\$400	\$375

# On-Island Expenditures

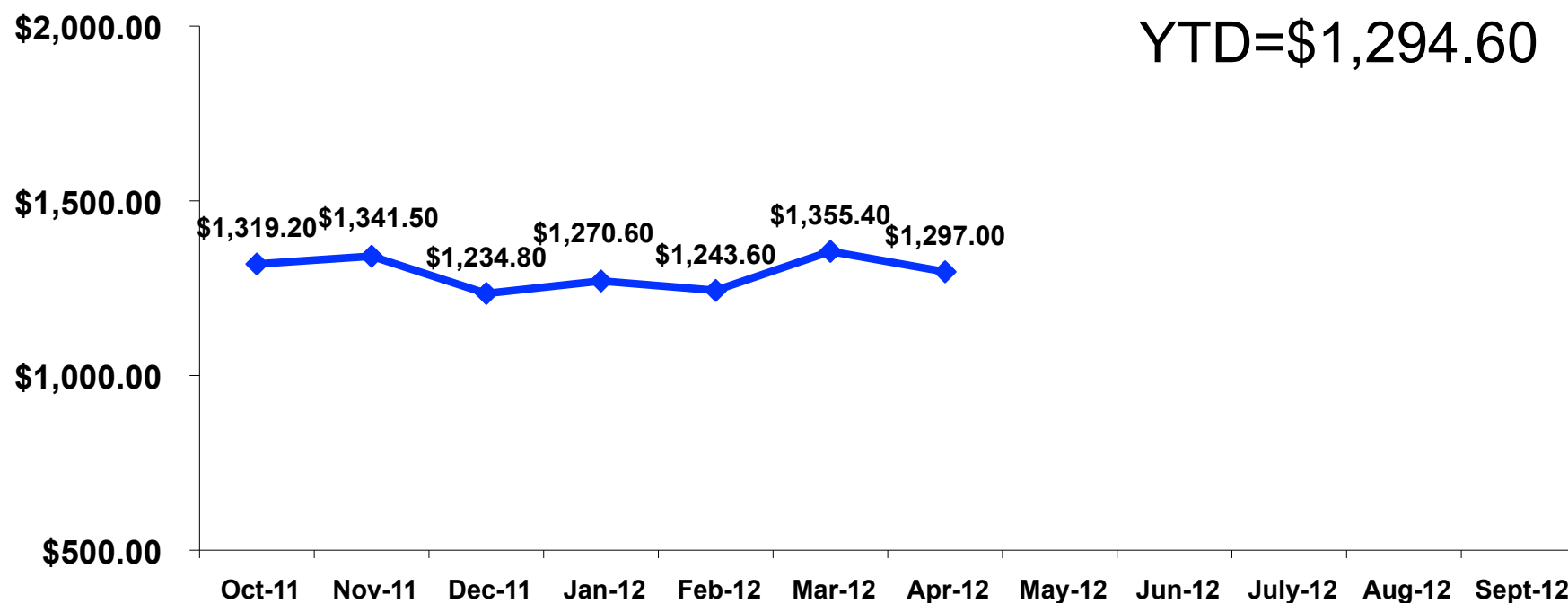
## First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$46.01	\$95.56
	Median	\$0	\$0
F&B-FF	Mean	\$26.15	\$21.58
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$32.92	\$61.73
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$110.16	\$50.78
TOUR	Median	\$0	\$0
GIFT/	Mean	\$220.20	\$189.44
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$112.18	\$56.16
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$16.45	\$23.36
	Median	\$0	\$0
OTHER EXP	Mean	\$279.14	\$342.51
	Median	\$5	\$0
TOTAL ON	Mean	\$844.01	\$840.00
ISLAND	Median	\$550	\$400

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

- \$1,297.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,945 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

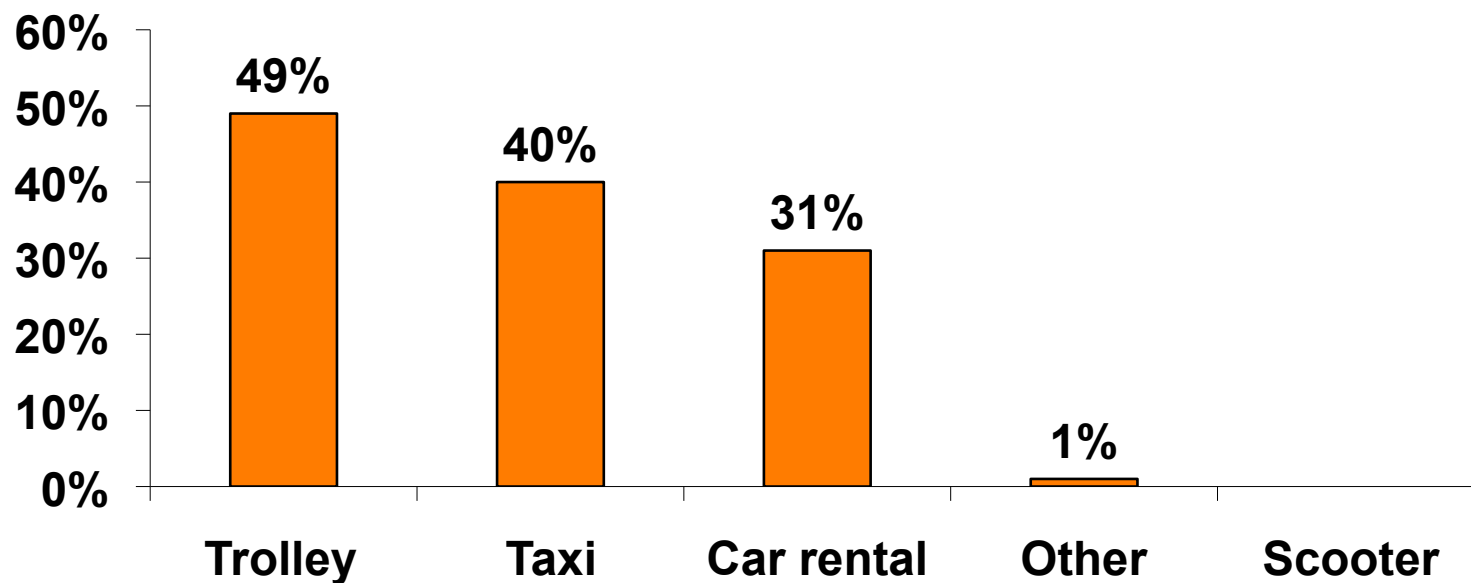


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$52.10
Food & beverage in fast food restaurant/ convenience store	\$25.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$36.40
Optional tours and activities	\$101.90
Gifts/ souvenirs for yourself/companions	\$215.00
Gifts/ souvenirs for friends/family at home	\$104.40
Local transportation	\$17.20
Other expenses not covered	\$293.00
<b>Average Total</b>	<b>\$846.10</b>

# Local Transportation

n=88



Mean=\$17.20 per travel party

# Guam Airport Expenditures

- \$59.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$4.80
Gifts/Souvenirs Self	\$33.30
Gifts/Souvenirs Others	\$21.10
Total	\$59.10

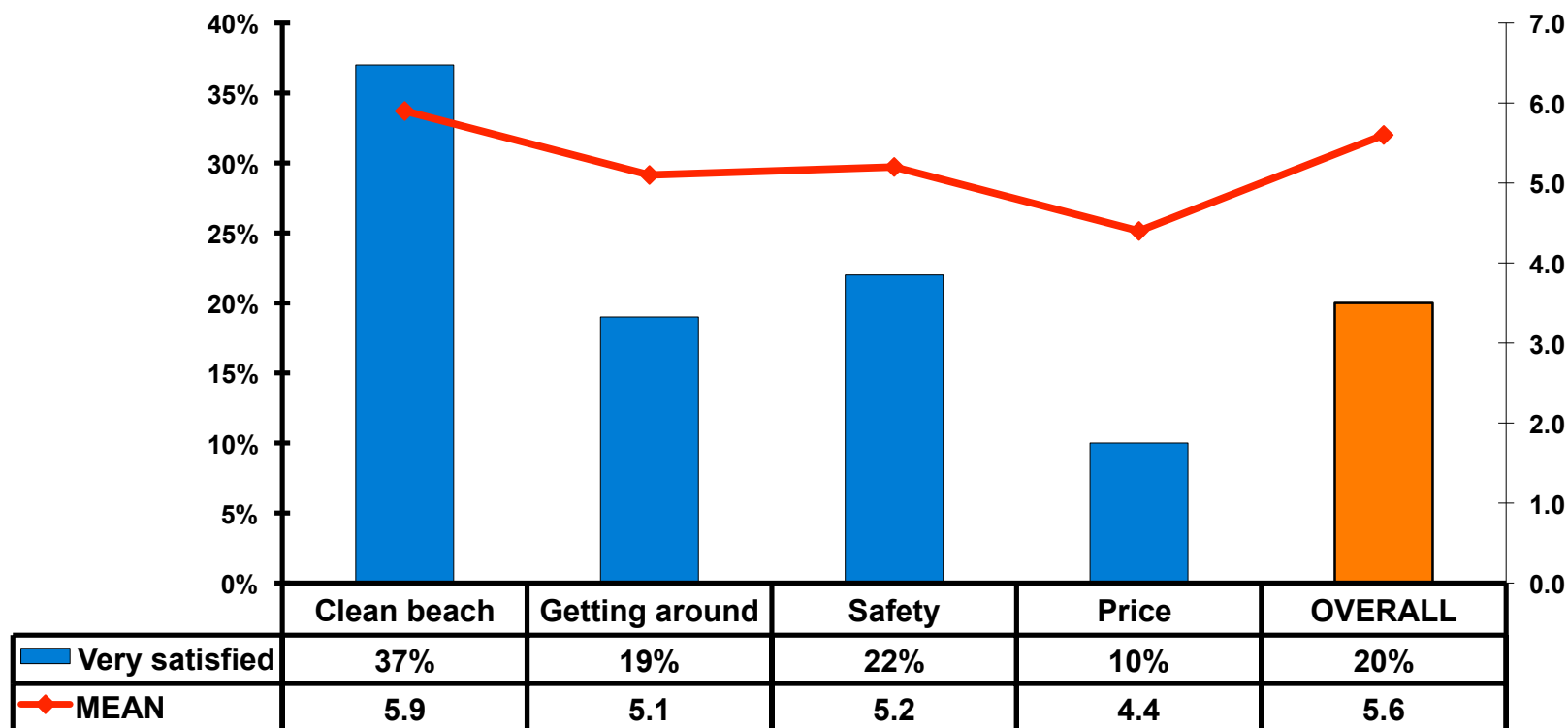


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

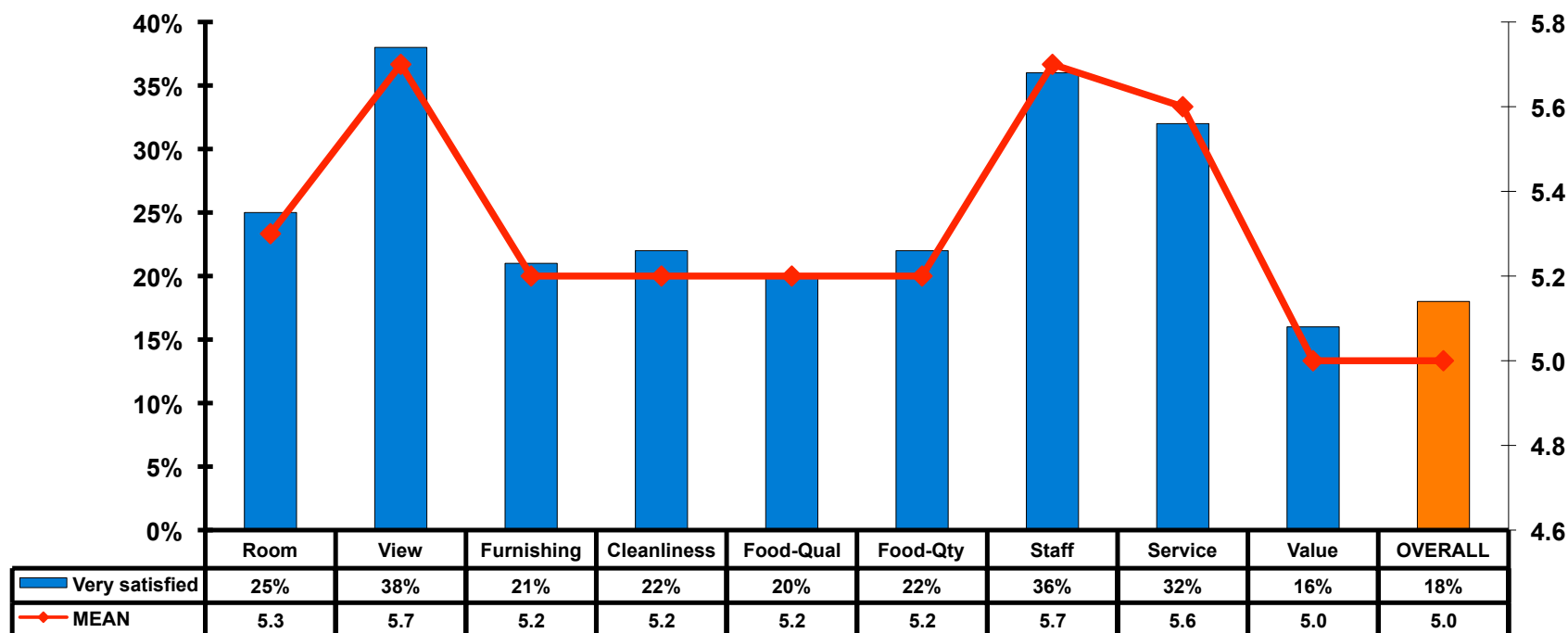
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

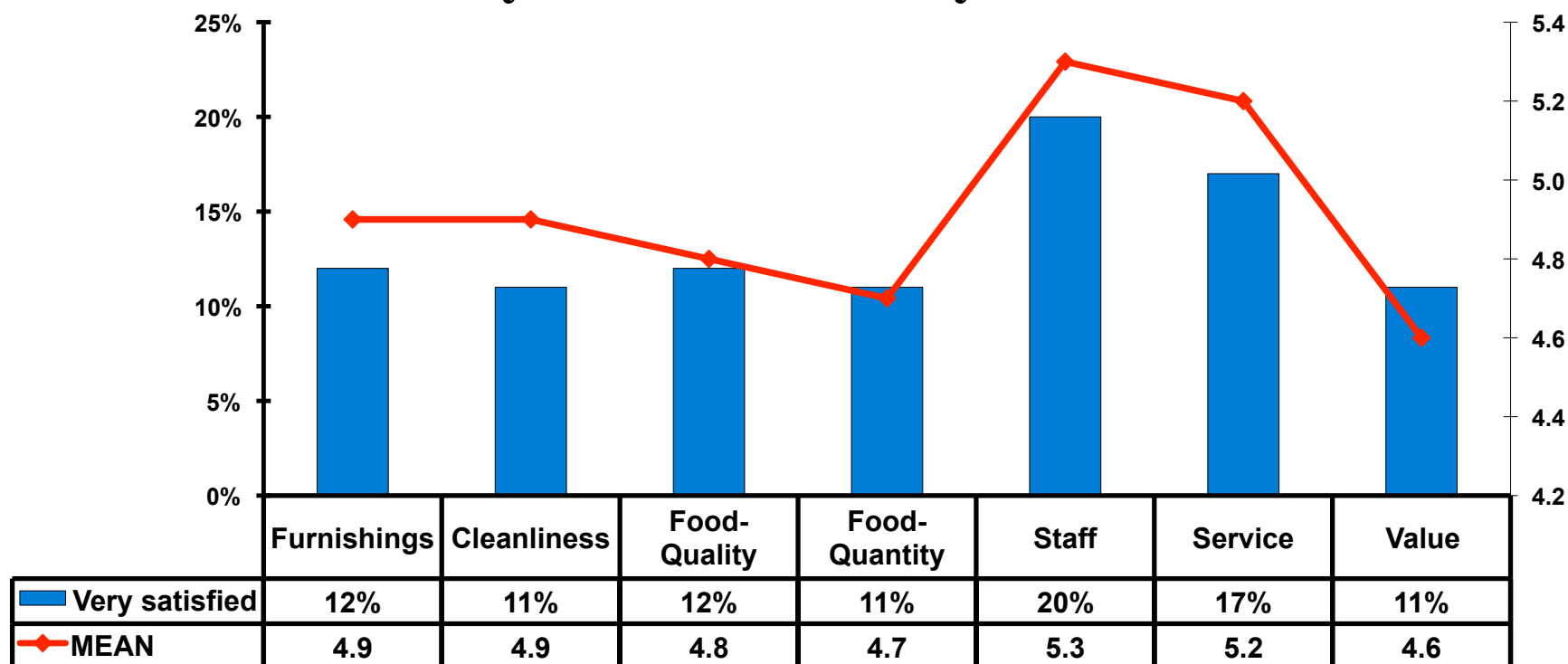
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

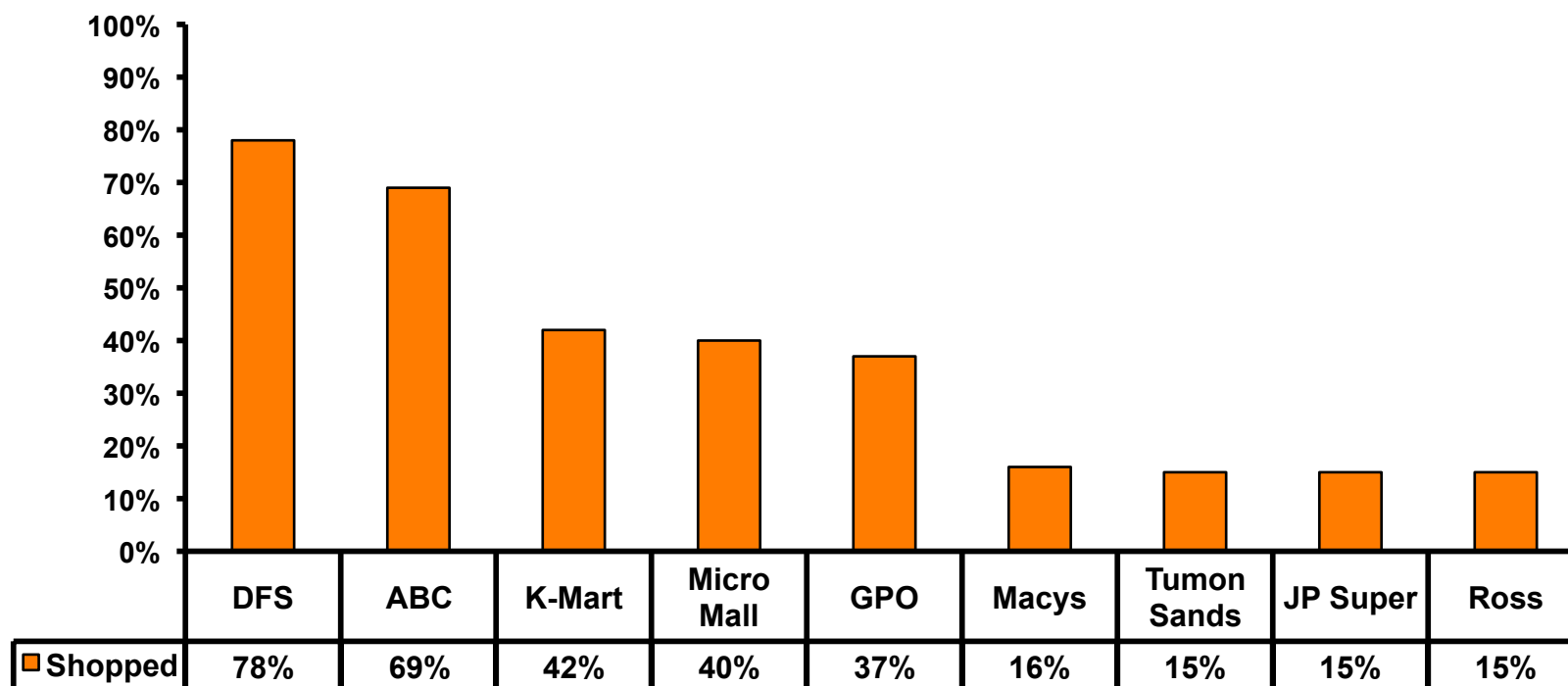
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

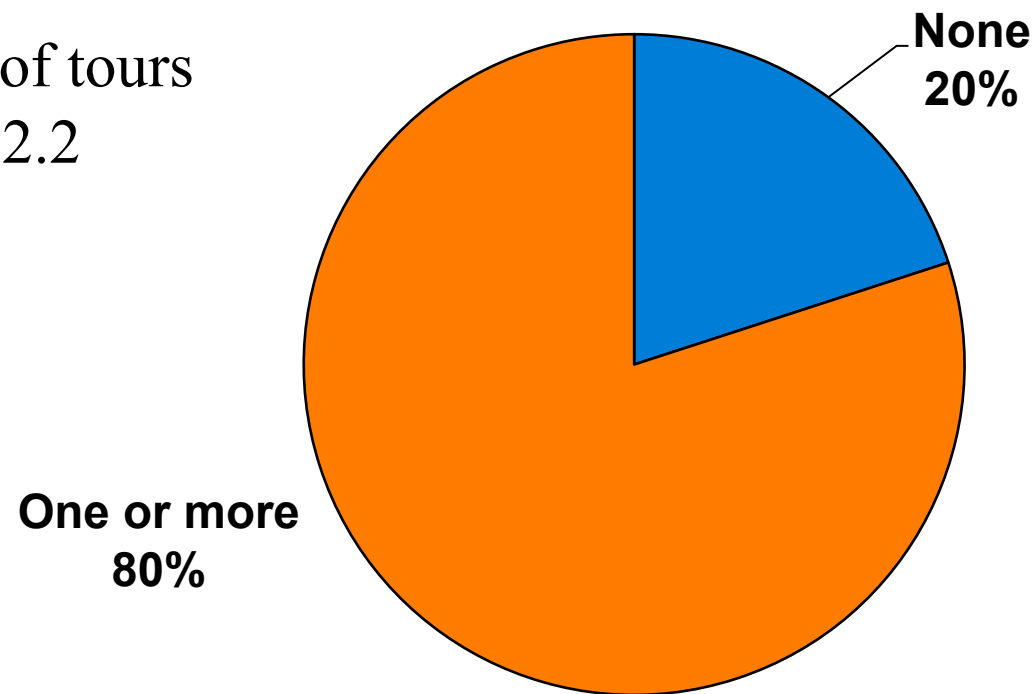
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>46%</b>	Score of 6 to 7 = <b>41%</b>
Score of 4 to 5 = <b>45%</b>	Score of 4 to 5 = <b>48%</b>
Score 1 to 3 = <b>9%</b>	Score 1 to 3 = <b>10%</b>
<b>MEAN = 5.1</b>	<b>MEAN = 5.0</b>

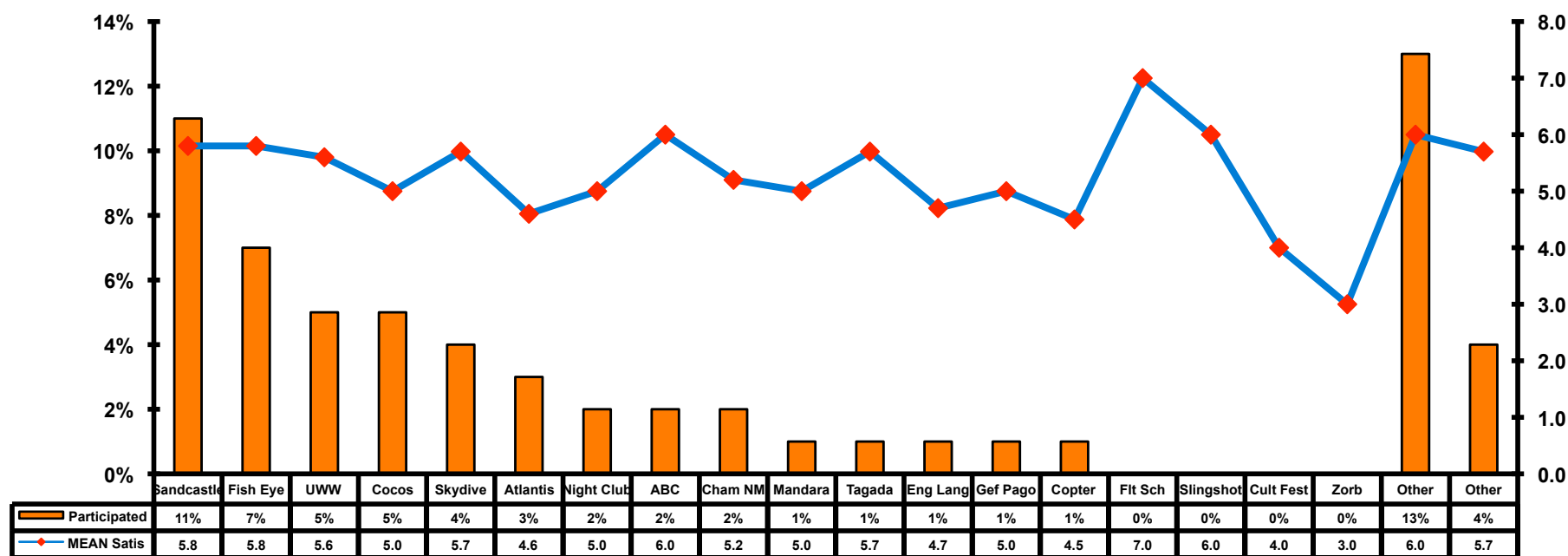
# Optional Tour Participation

- Average number of tours participated in is 2.2



# Optional Tours

## Participation & Satisfaction





# Day Tours Satisfaction

**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>46%</b>	Score of 6 to 7 = <b>37%</b>
Score of 4 to 5 = <b>50%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>9%</b>
<b>MEAN = 5.2</b>	<b>MEAN = 5.0</b>

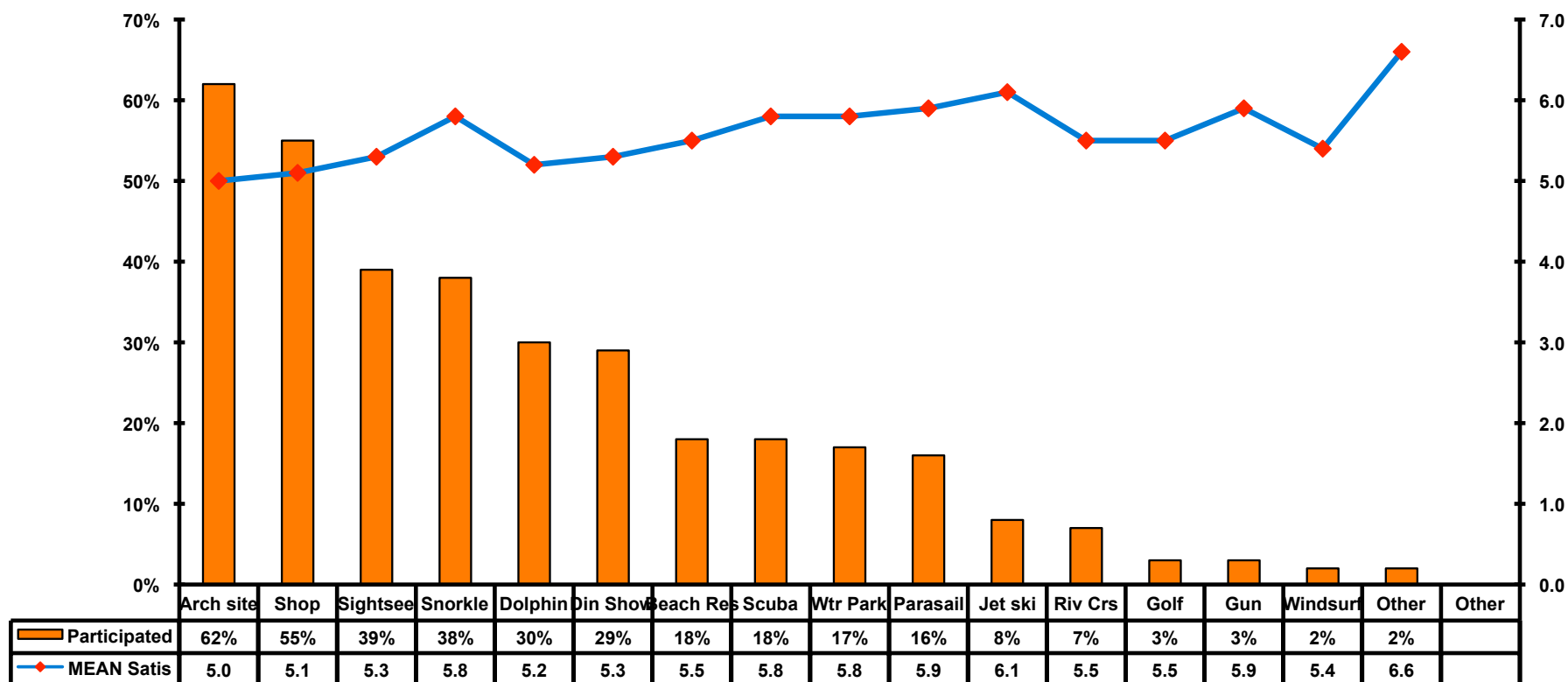
# Night Tours Satisfaction

7pt Rating Scale

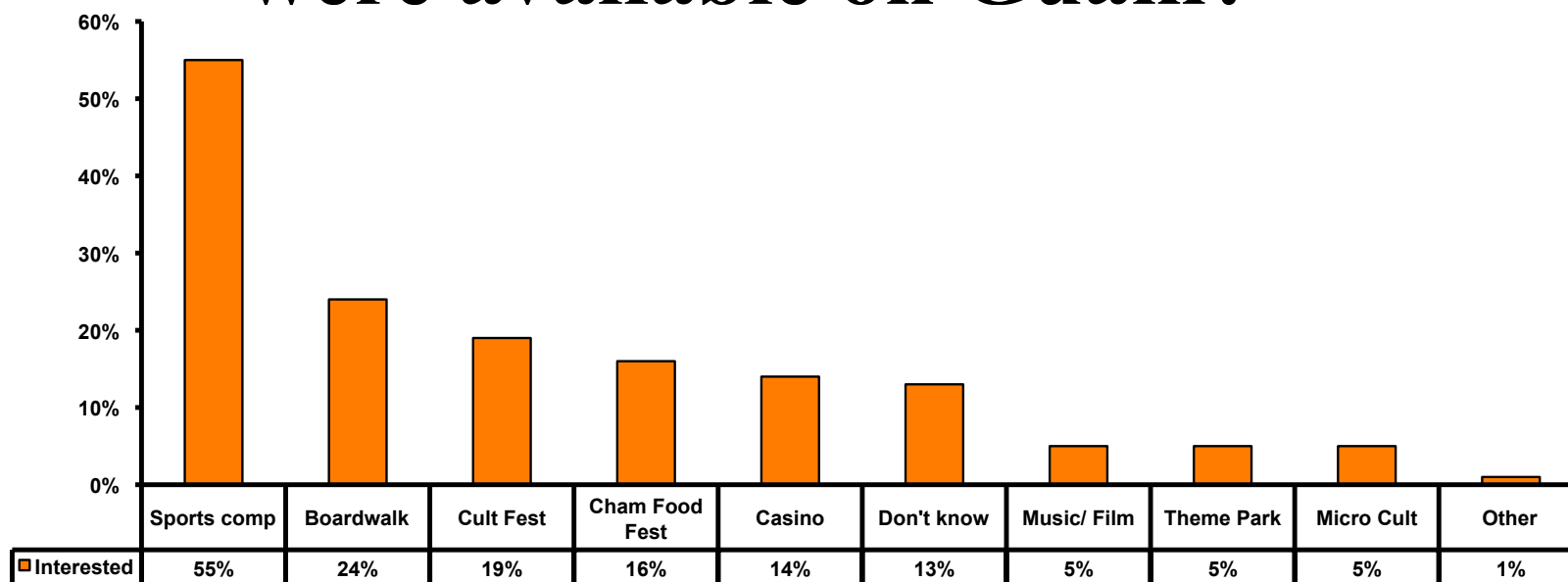
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>29%</b>	Score of 6 to 7 = <b>28%</b>
Score of 4 to 5 = <b>60%</b>	Score of 4 to 5 = <b>57%</b>
Score 1 to 3 = <b>11%</b>	Score 1 to 3 = <b>16%</b>
<b>MEAN = 4.7</b>	<b>MEAN = 4.6</b>

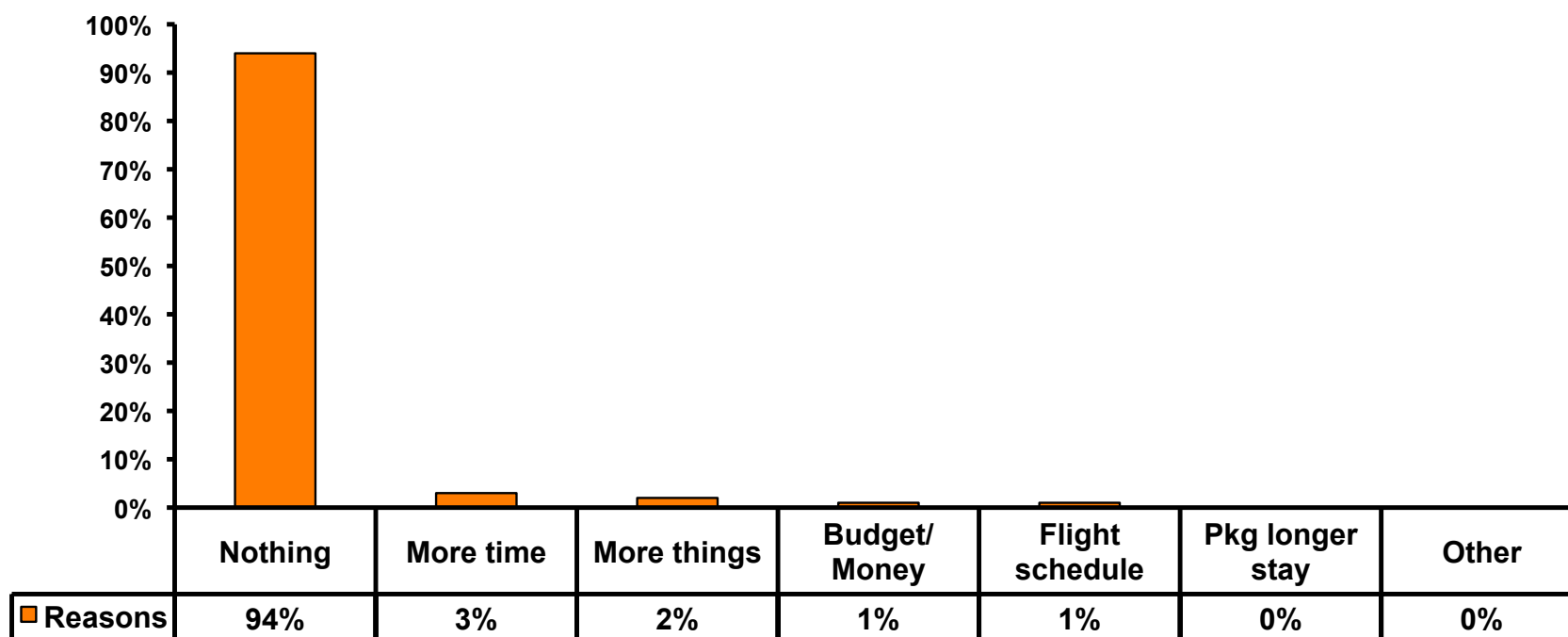
# Satisfaction with Other Activities



# Which activities or attractions would you most likely participate in if they were available on Guam?



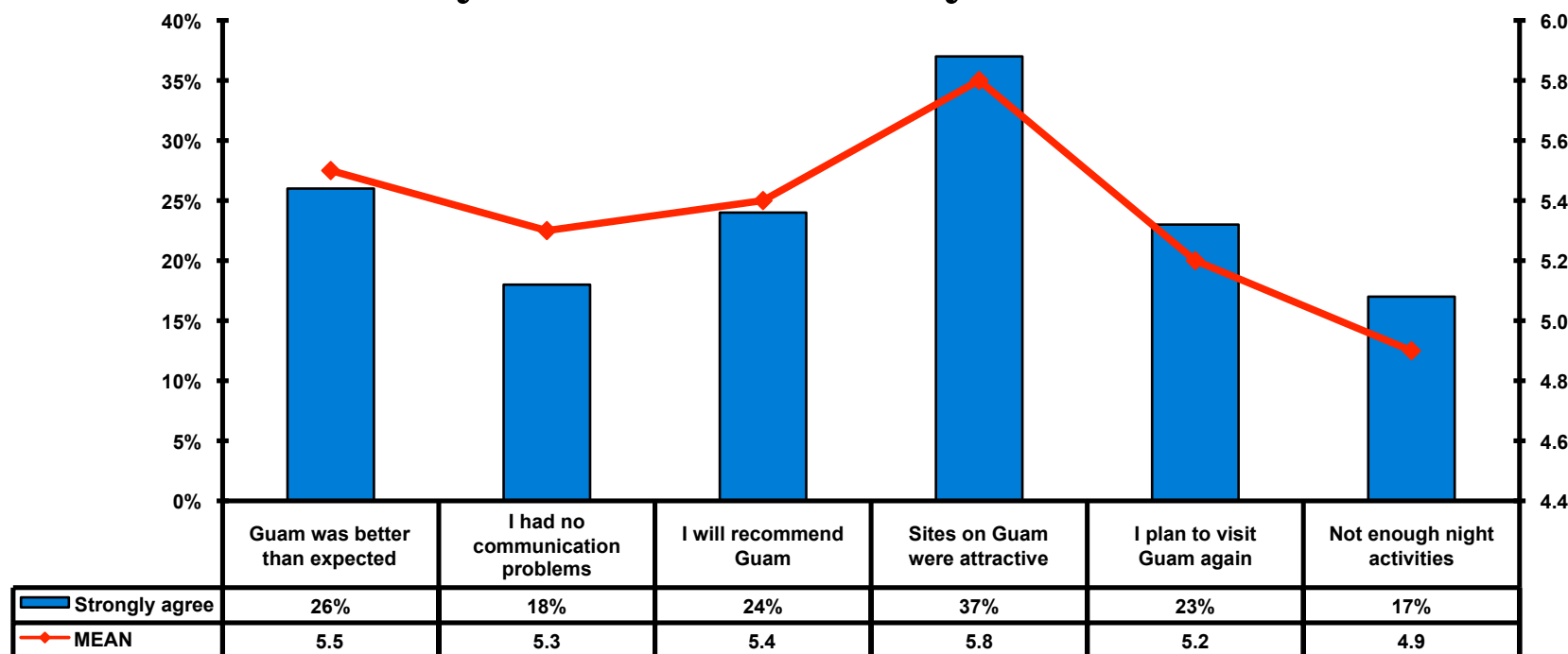
# What would it take to make you want to stay an extra day on Guam?



# On-Island Perceptions

7pt Rating Scale

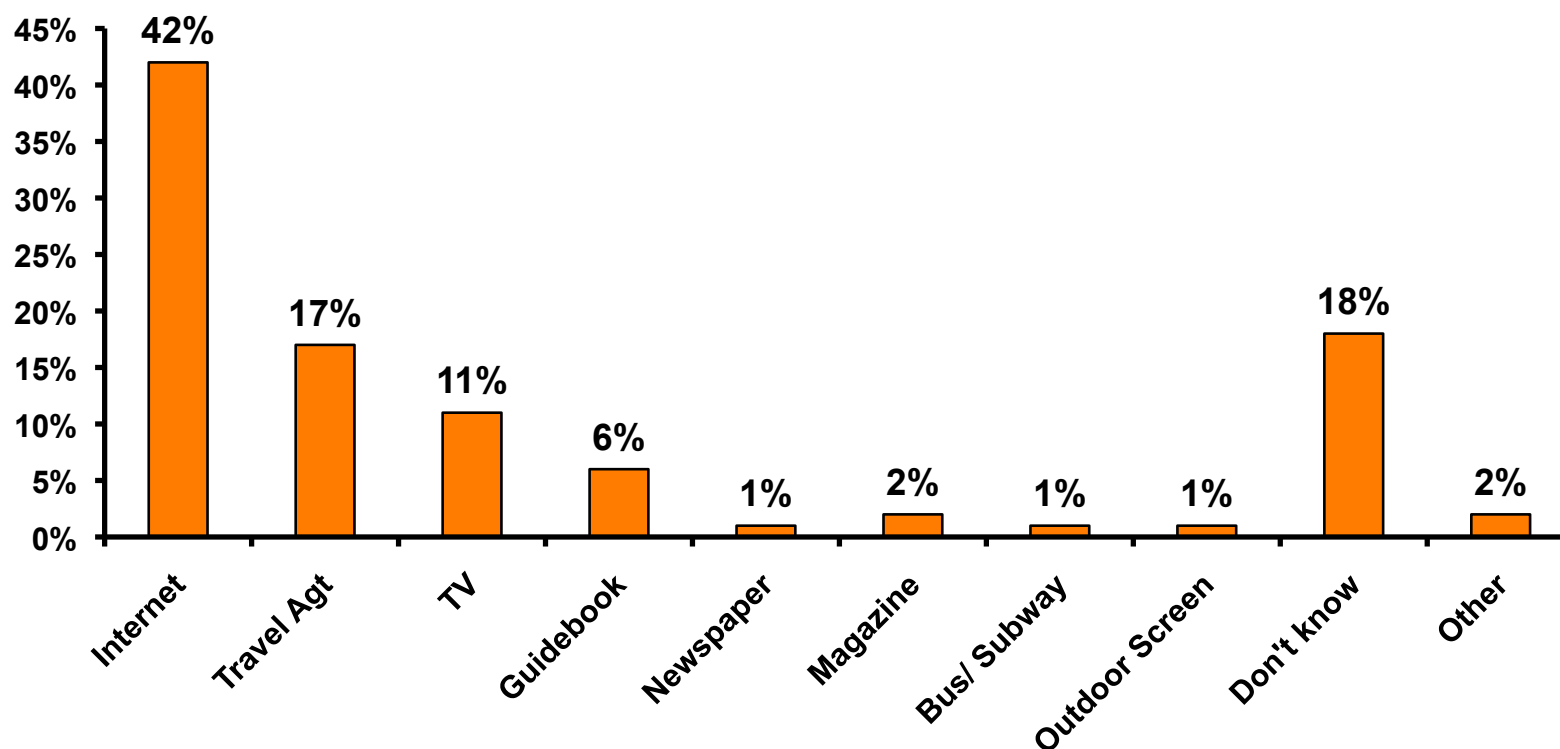
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

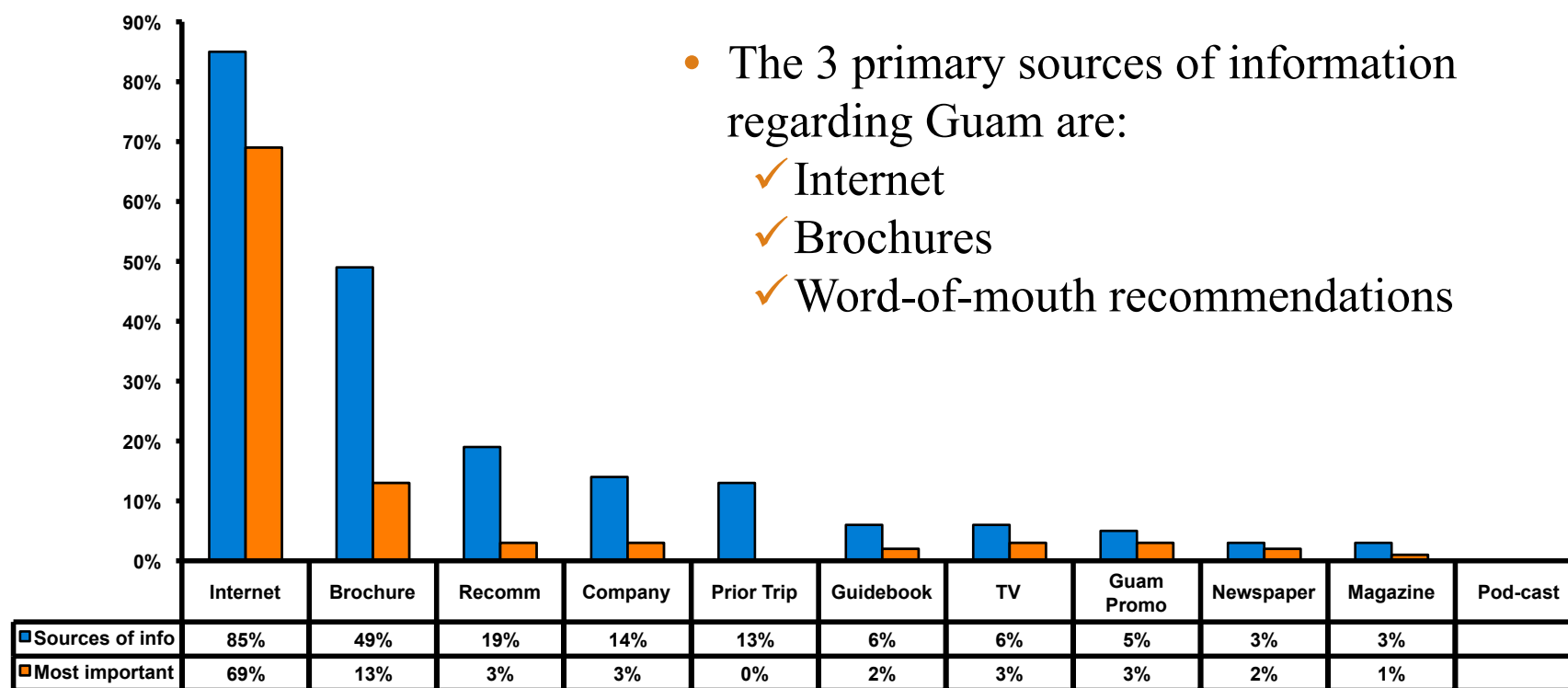
# Guam Promotion - Media

## Past 90 days



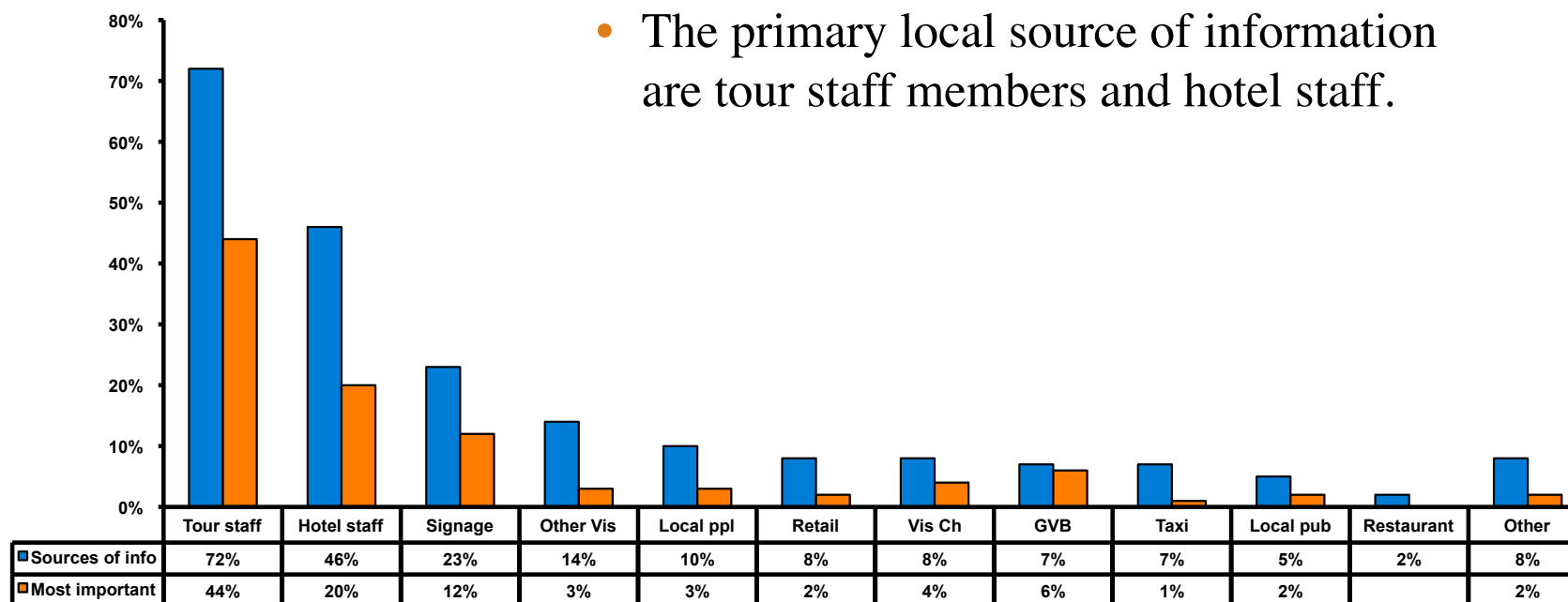


# Sources of Information Pre-arrival



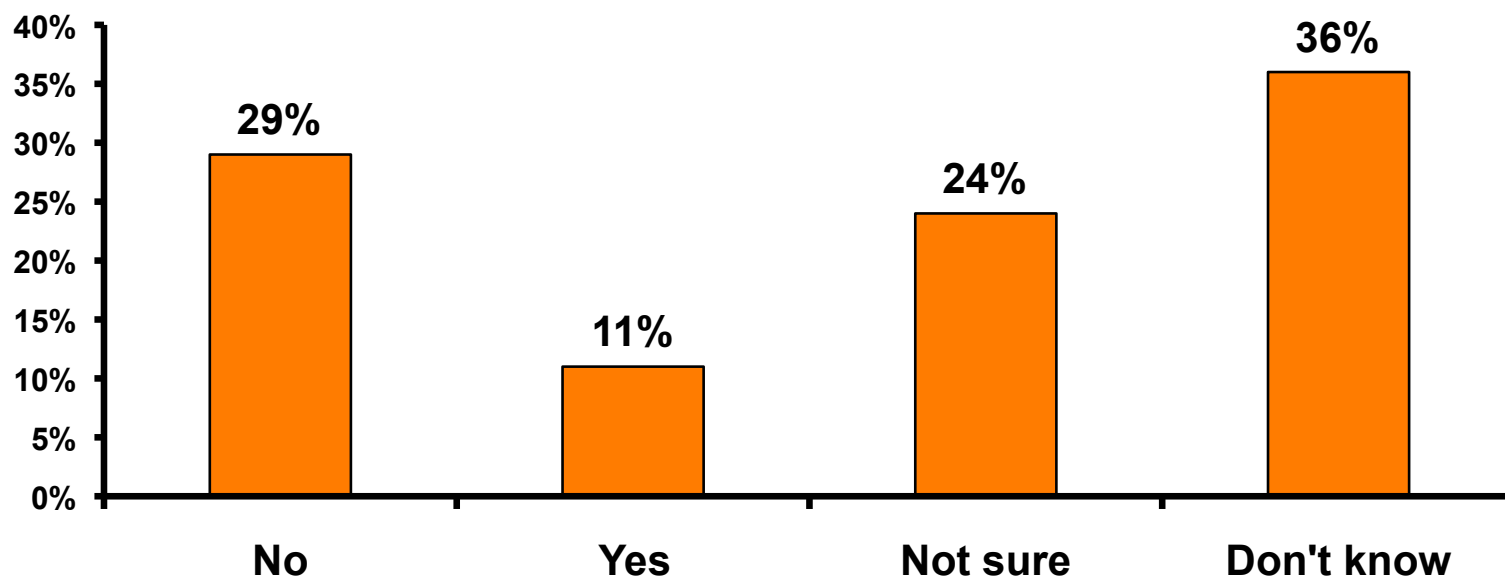
# Sources of Information Post-arrival

- The primary local source of information are tour staff members and hotel staff.



# SECTION 6 **OTHER ISSUES**

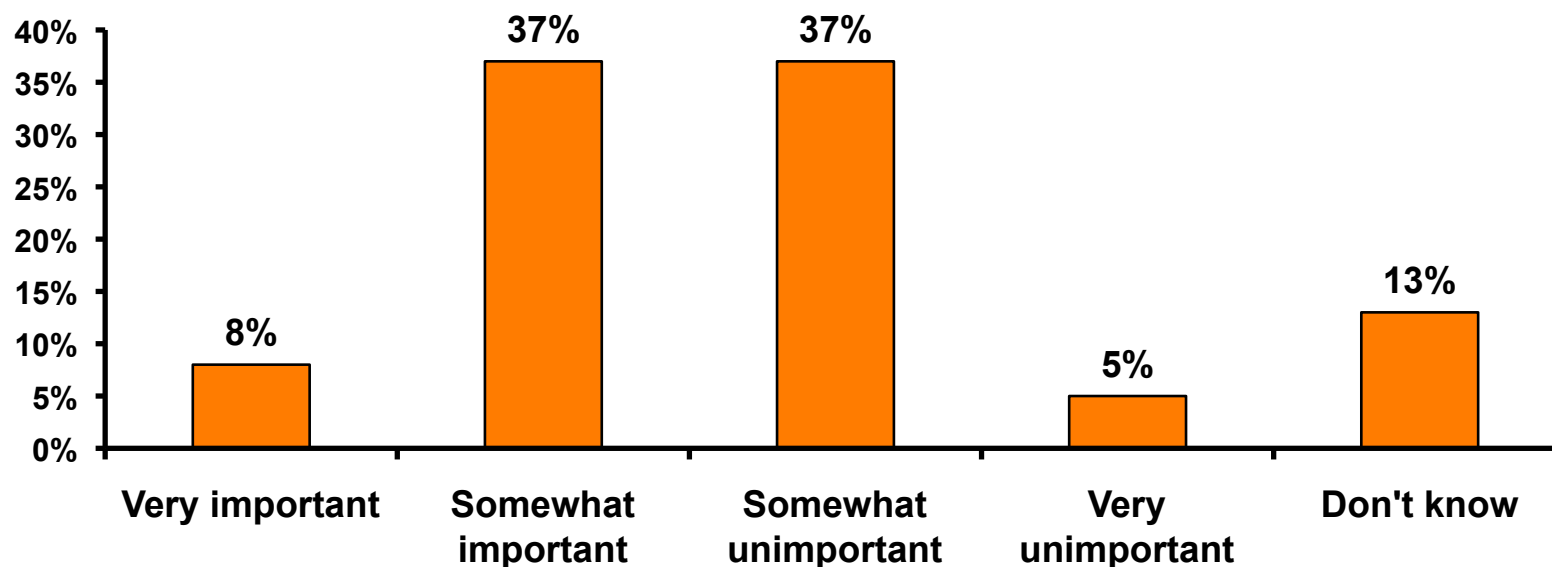
## Good time to spend money on travel outside of Korea - Overall



# Good time to spend money on travel outside of Korea by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No	100%	31%	27%	31%	17%	33%	30%	22%	30%	42%
	Yes		12%	11%	11%		8%	14%	11%	7%	8%
	Not sure		20%	25%	22%	50%	14%	23%	31%	24%	8%
	Do not know		37%	36%	36%	33%	44%	33%	36%	39%	42%
Total	Count	2	81	212	45	12	36	118	109	67	12

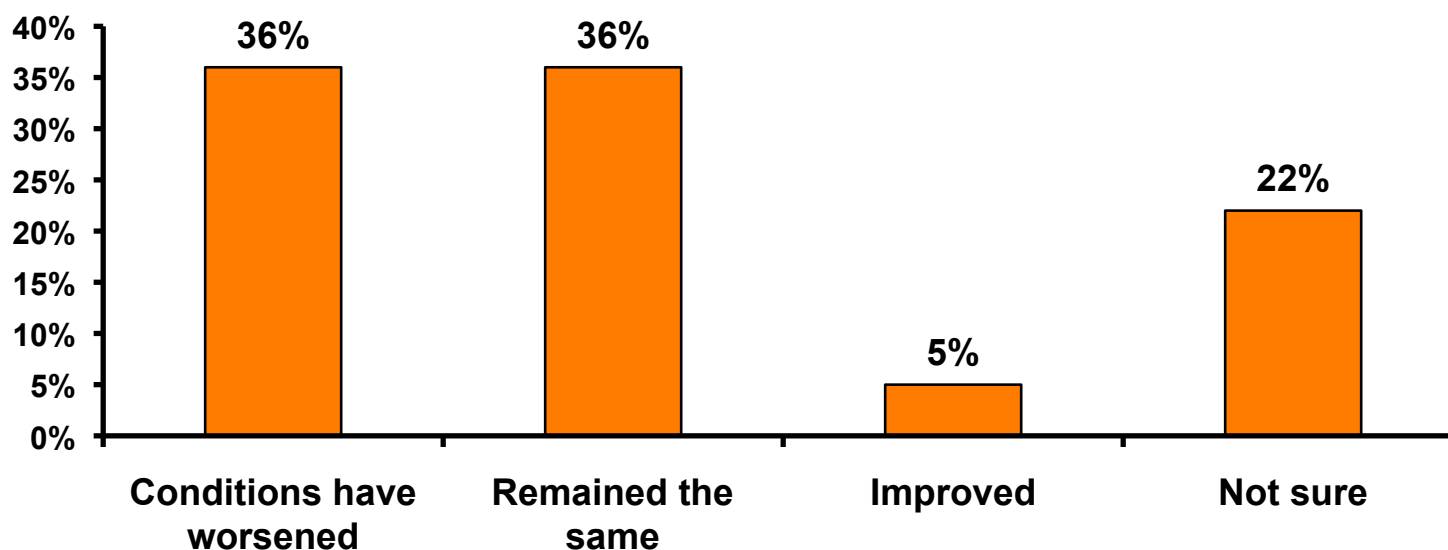
# The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



# The importance of the state of the Korean economy in decision to travel outside of Korea by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.23	Very unimportant		6%	5%	7%		3%	5%	6%	4%	
	Somewhat unimportant		19%	43%	47%	25%	36%	34%	38%	45%	17%
	Somewhat important	50%	40%	36%	33%	50%	33%	37%	39%	34%	33%
	Very important	50%	14%	6%	7%		17%	6%	7%	3%	33%
	Don't know		22%	10%	7%	25%	11%	18%	9%	13%	17%
Total	Count	2	81	211	45	12	36	117	109	67	12

# Rating Korean Economy Compared to 12 months ago

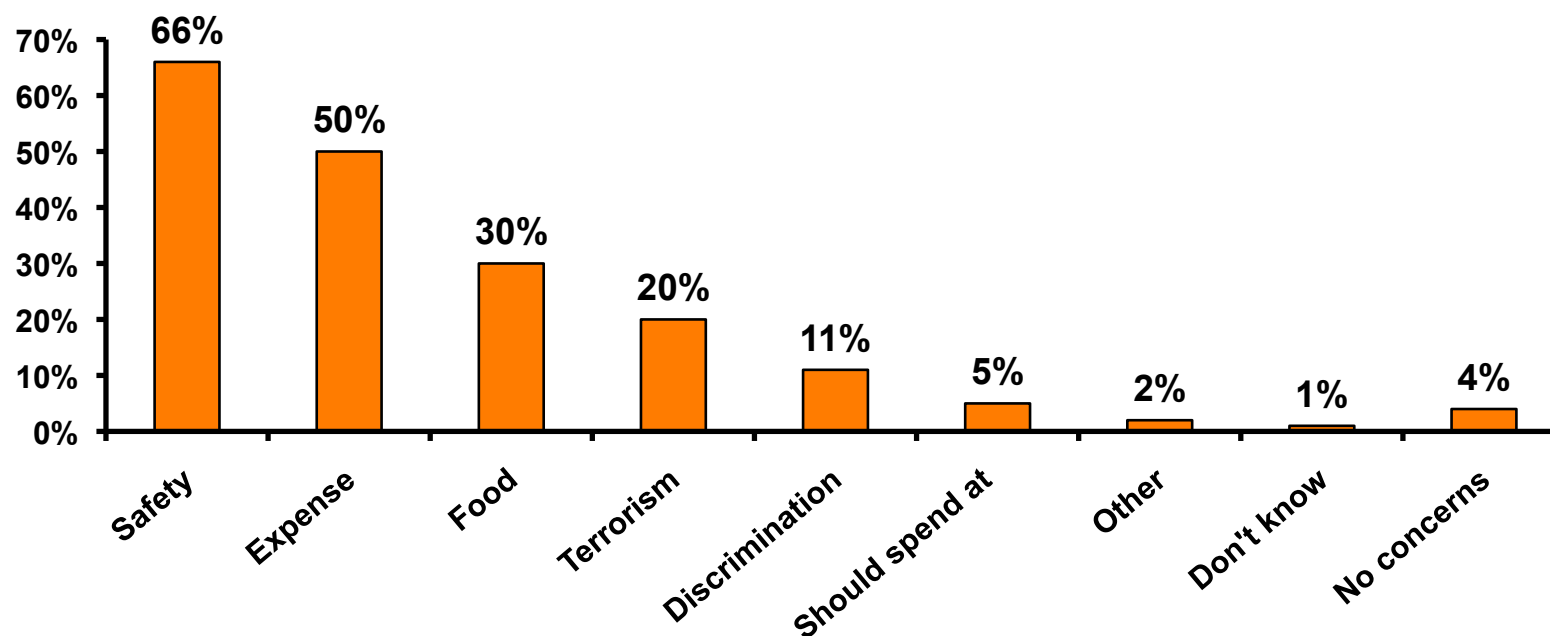




# Rating Korean Economy Compared to 12 months ago by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.21	Conditions have worsened	50%	35%	38%	24%	42%	50%	39%	32%	27%	42%
	Conditions have remained the same		32%	36%	51%	33%	28%	35%	41%	40%	25%
	Conditions have improved		7%	4%	7%	8%	3%	5%	8%	4%	
	Do not know	50%	26%	22%	18%	17%	19%	21%	19%	28%	33%
Total	Count	2	81	211	45	12	36	118	108	67	12

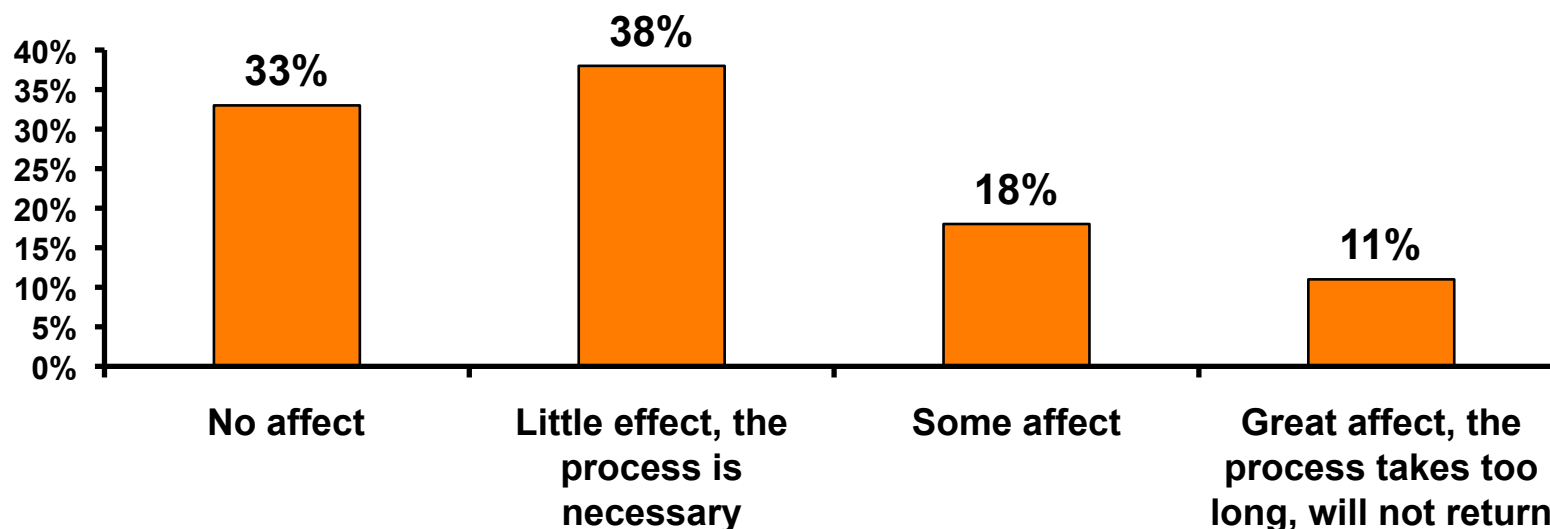
# Concerns about travel outside of Korea - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.24	Safety at my destination	50%	62%	69%	63%	58%	58%	61%	73%	67%	55%
	Expense	50%	57%	50%	44%	42%	42%	53%	48%	56%	27%
	Food		31%	31%	26%	42%	42%	37%	27%	20%	18%
	Terrorism	50%	28%	19%	16%	8%	36%	16%	20%	15%	64%
	Spending money abroad when it should be spent at home		7%	4%	2%	8%	6%	6%	3%	2%	18%
	No concerns		7%	3%	5%			4%	5%	6%	9%
	Other		4%	2%			3%	3%	2%	3%	
	Do not know		2%	0%	2%			3%	1%		
Total	Cases	2	81	210	43	12	36	116	109	66	11

# Security Screening/ Immigration Process at Guam International Airport

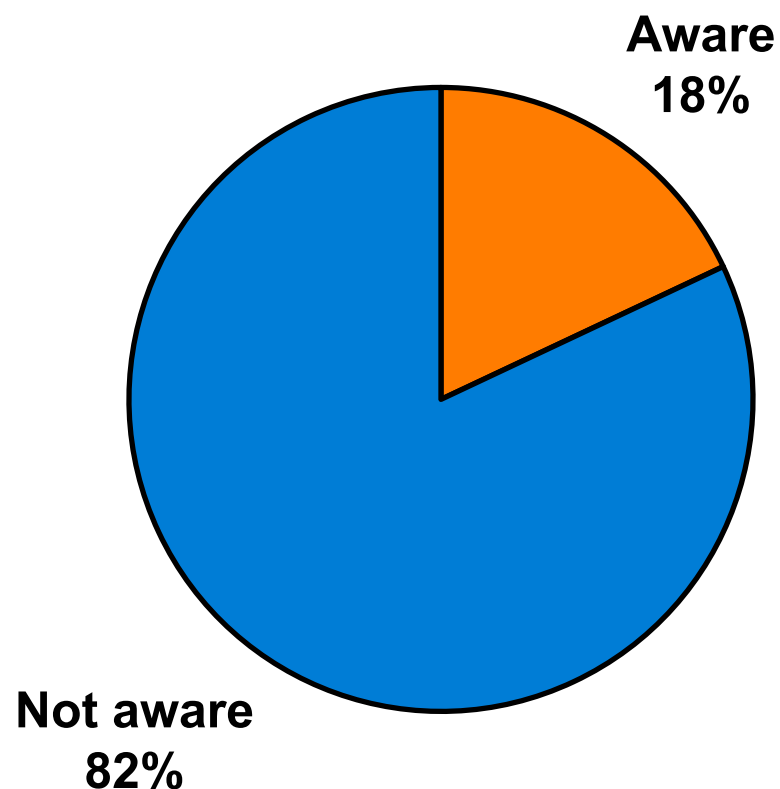


## **Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum**

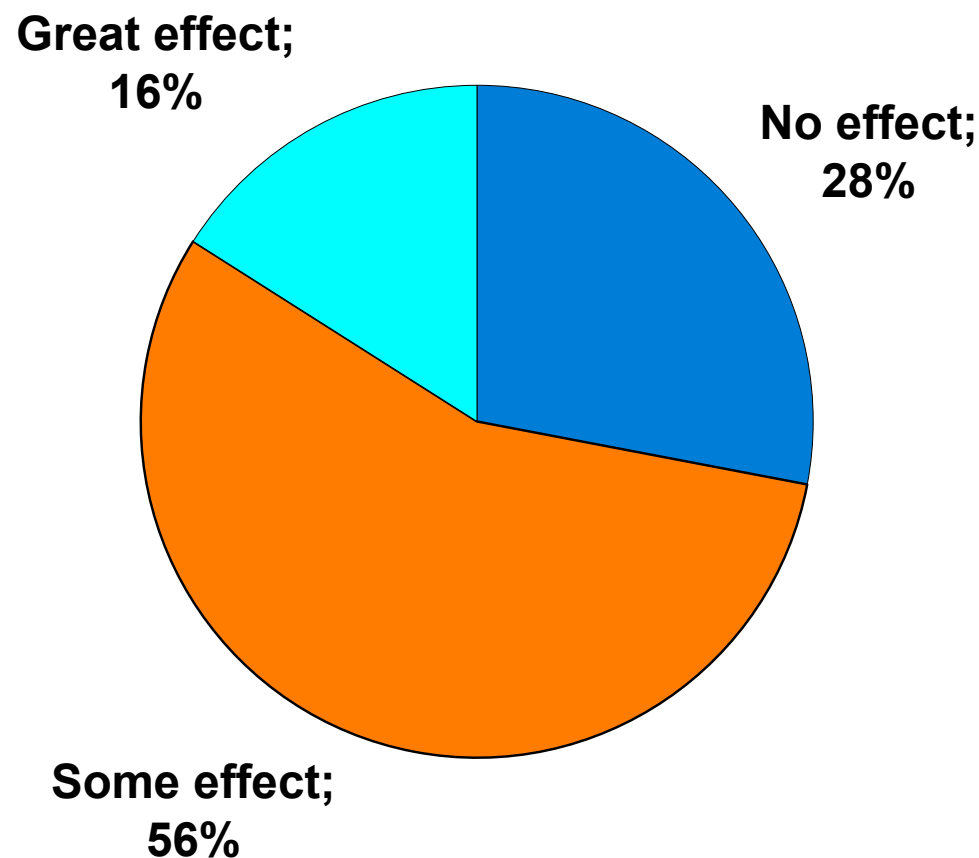
- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **9%**
- Neutral (Score 4-5) – **41%**
- Disagree (Score 1-3) – **51%**

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## Awareness of U.S. Military troops moving from Japan to Guam



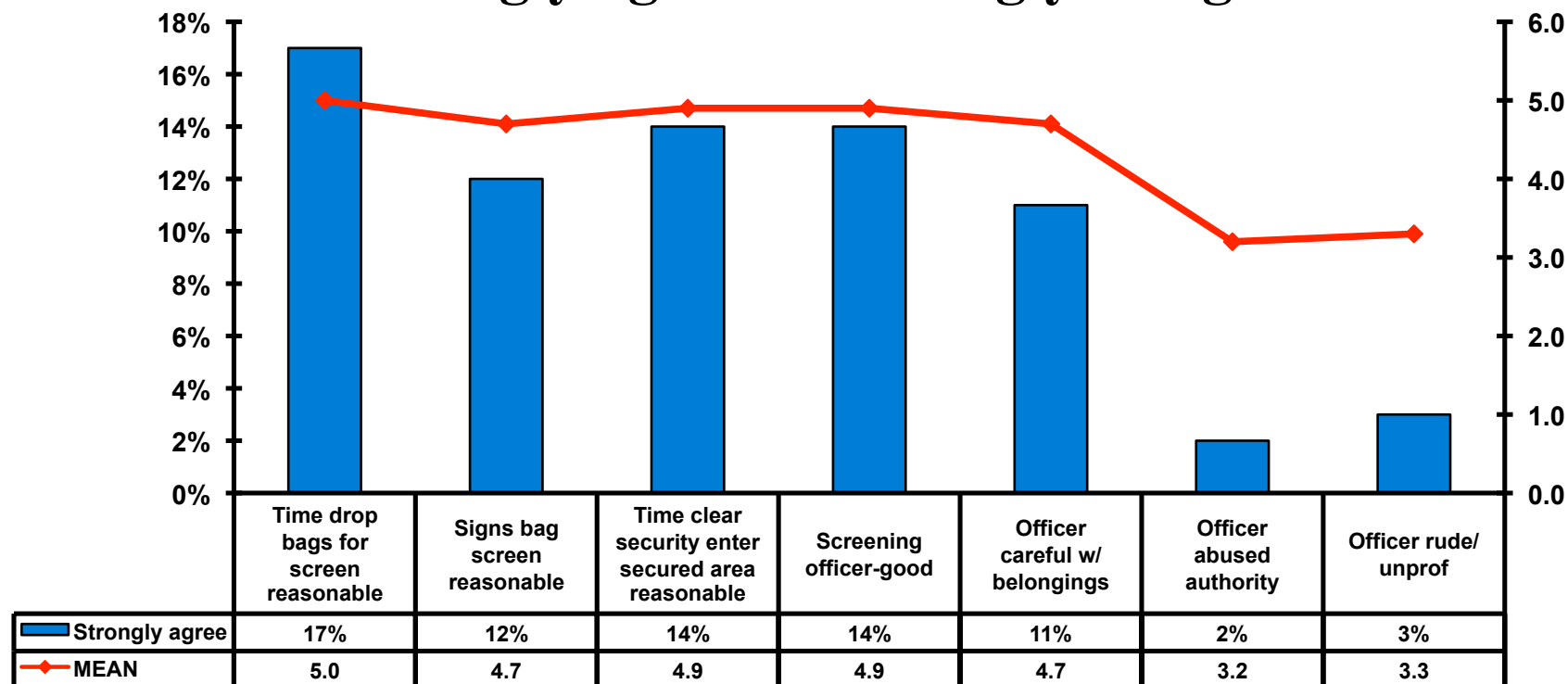
# Effects of US military troop movement on future trips to Guam



# Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree





# Likelihood of travel outside of Korea within the next 6 to 24 months

