



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2013

AUGUST 2013



Prepared by: QMark Research

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Background & Methodology

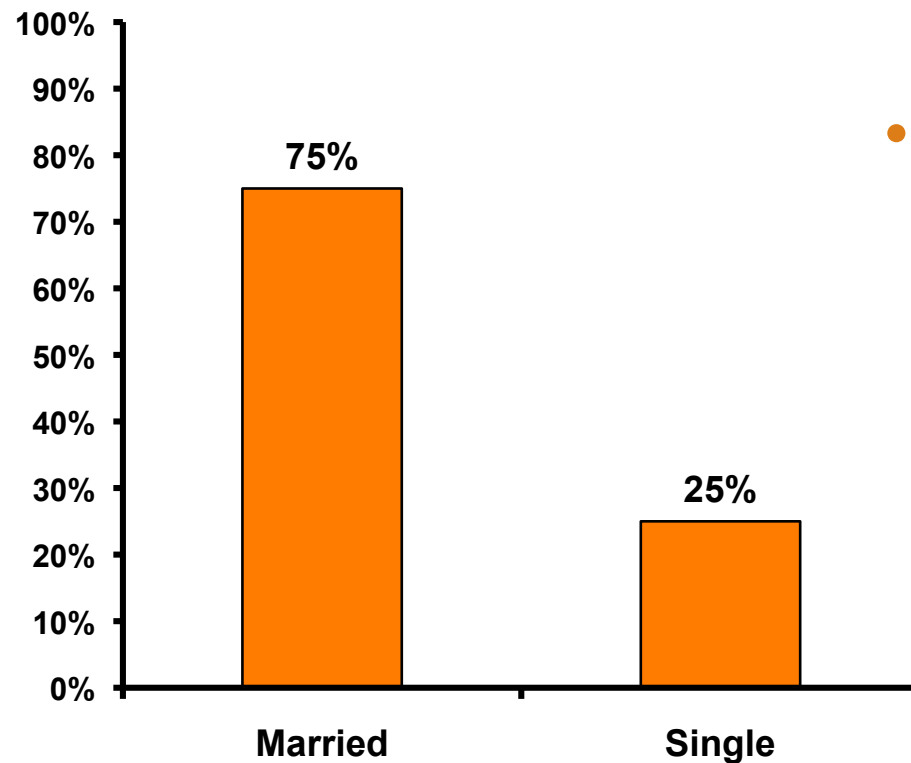
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing 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 **350** 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.

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.

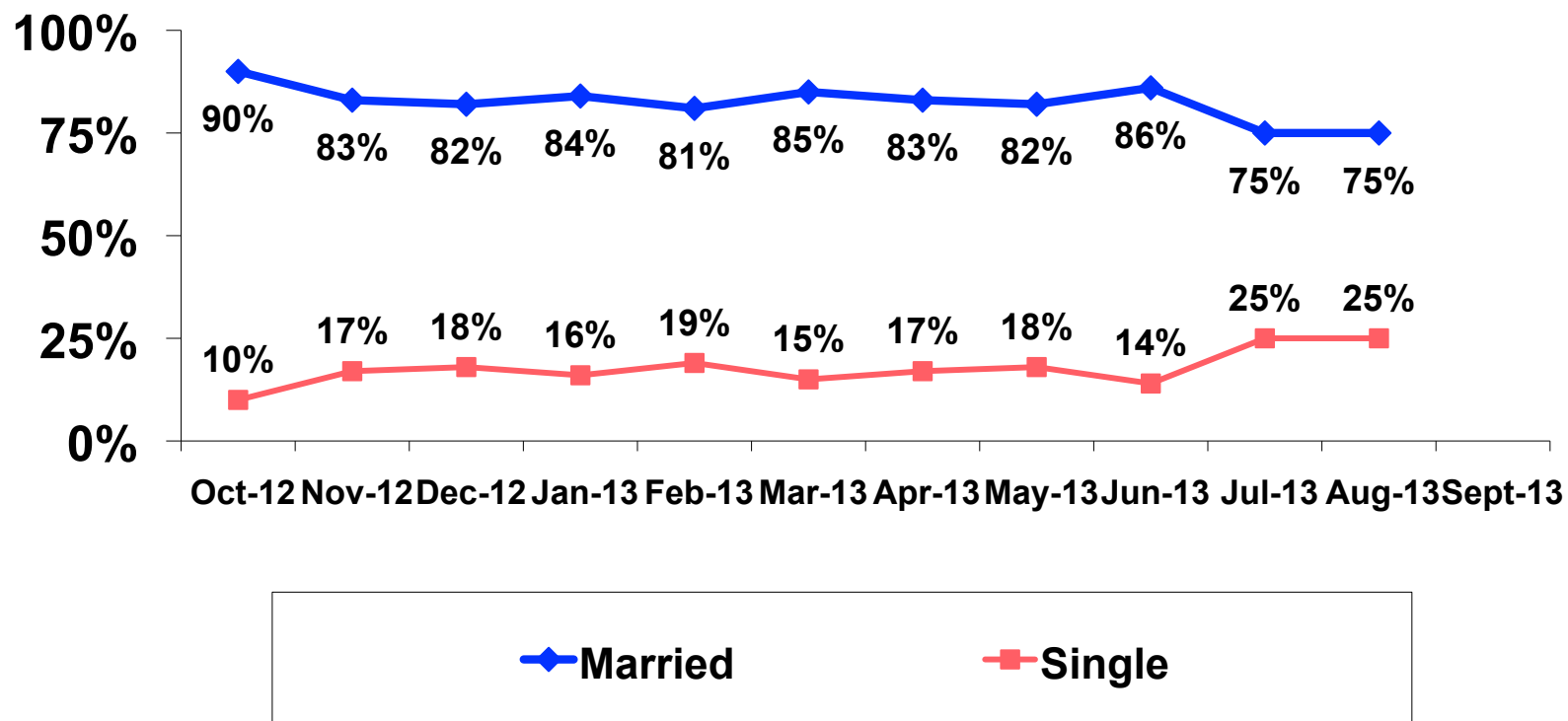
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

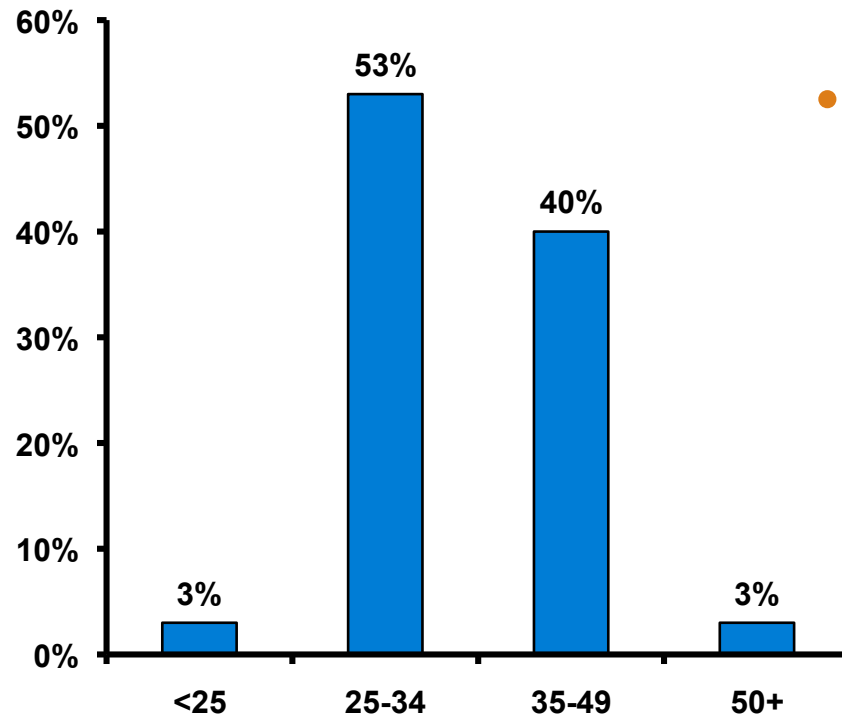


- Majority of Korean visitors are married.

Marital Status

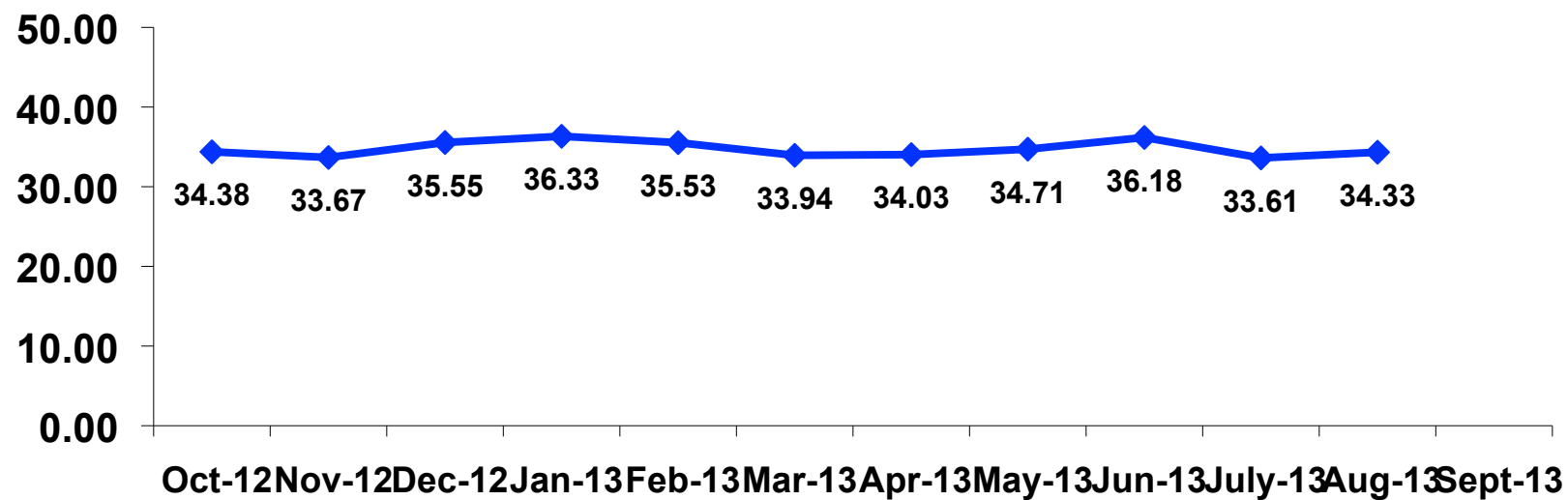


Age - Overall

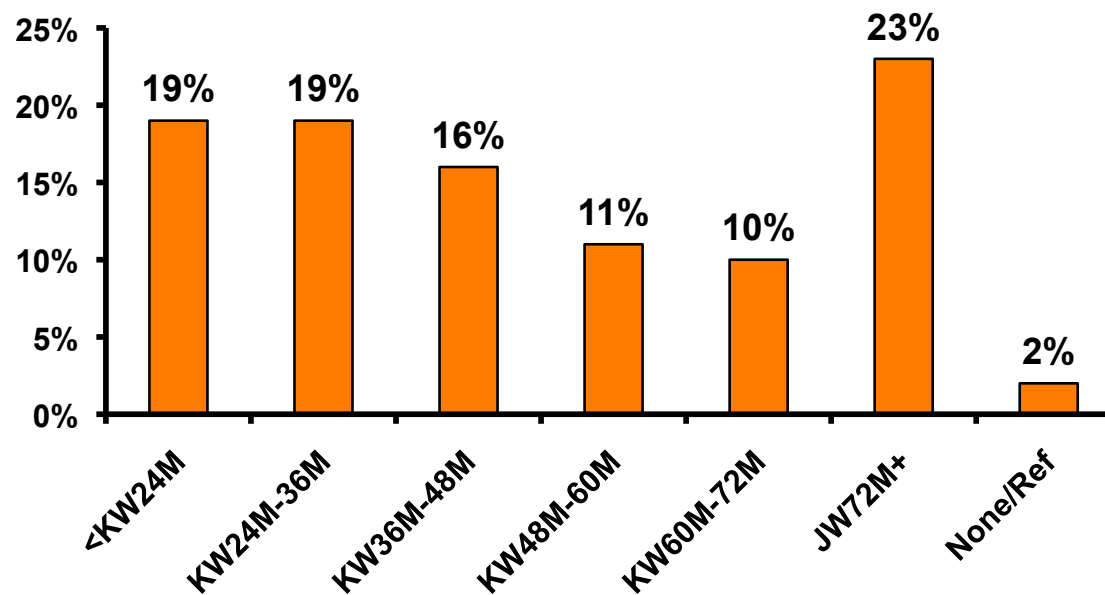


- The average age of the respondents is 34.33 years of age.

Average Age

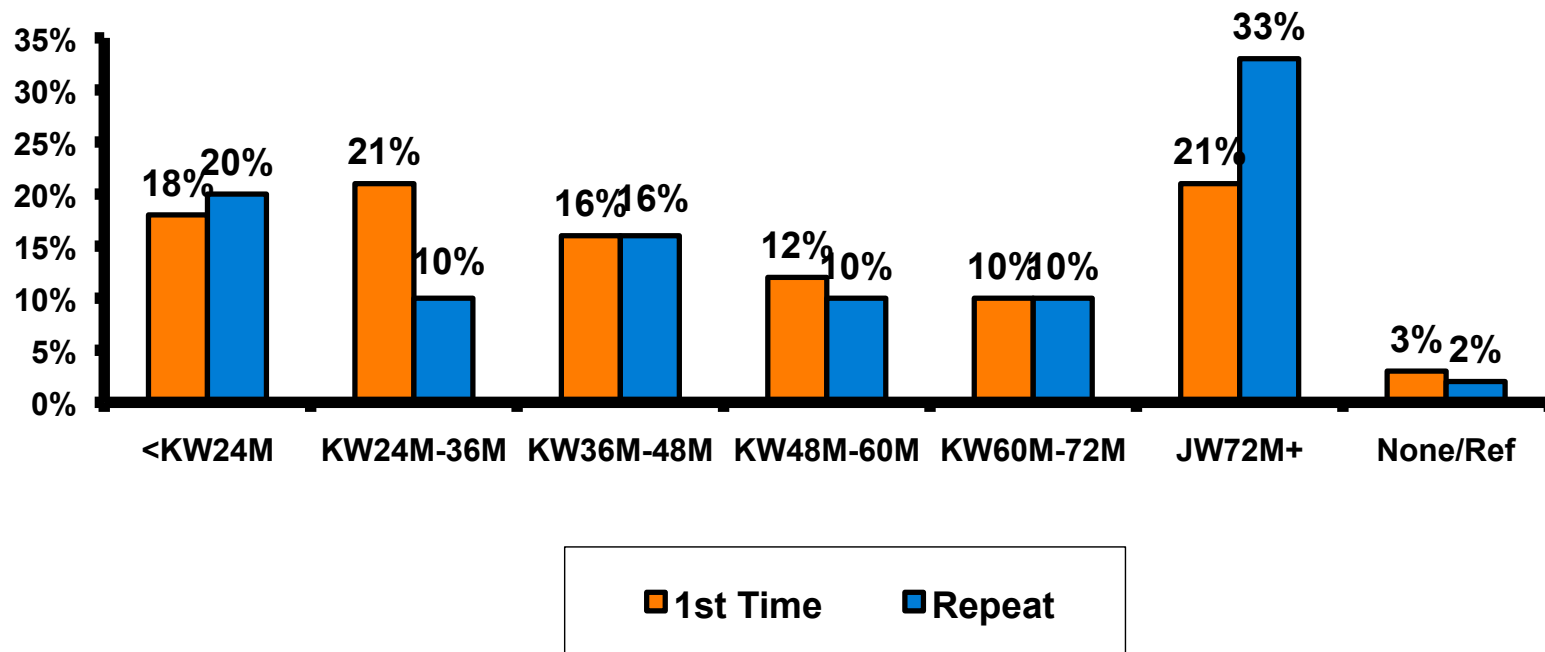


Personal Income



• KW1,093.66=\$1

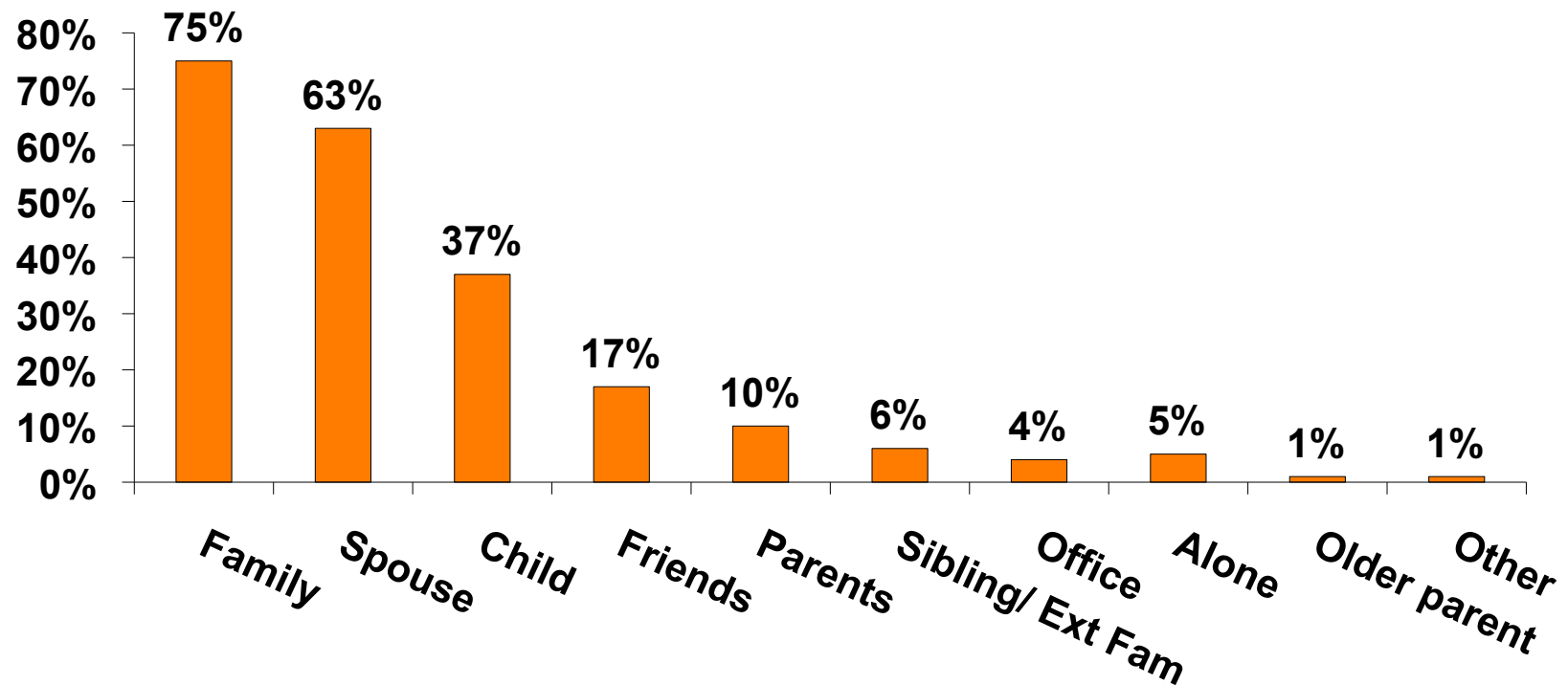
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	25	10	15	1	23	1	
		Column N %	8%	6%	9%	14%	13%	1%	
	KW12.0M-KW24.0M	Count	35	13	21	1	25	9	
		Column N %	11%	8%	13%	14%	14%	7%	
	KW24.0M-KW36.0M	Count	63	29	34	3	44	15	1
		Column N %	19%	17%	22%	43%	25%	11%	9%
	KW36.0M-KW48.0M	Count	52	30	21	2	30	18	2
		Column N %	16%	18%	13%	29%	17%	14%	18%
	KW48.0M-KW60.0M	Count	37	19	18		22	12	3
		Column N %	11%	11%	11%		12%	9%	27%
	KW60.0M-KW72.0M	Count	32	17	15		12	20	
		Column N %	10%	10%	9%		7%	15%	
	KW72.0M+	Count	76	47	29		16	55	5
		Column N %	23%	28%	18%		9%	42%	45%
	No Income	Count	8	3	5		6	1	
		Column N %	2%	2%	3%		3%	1%	
	Total	Count	328	168	158	7	178	131	11

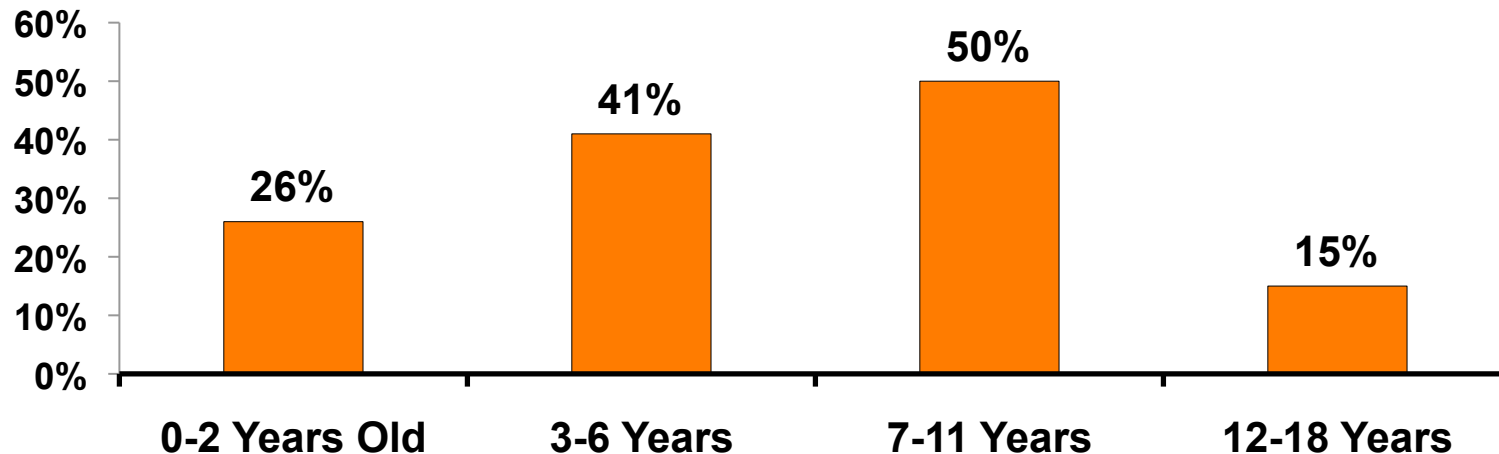
Travel Companions



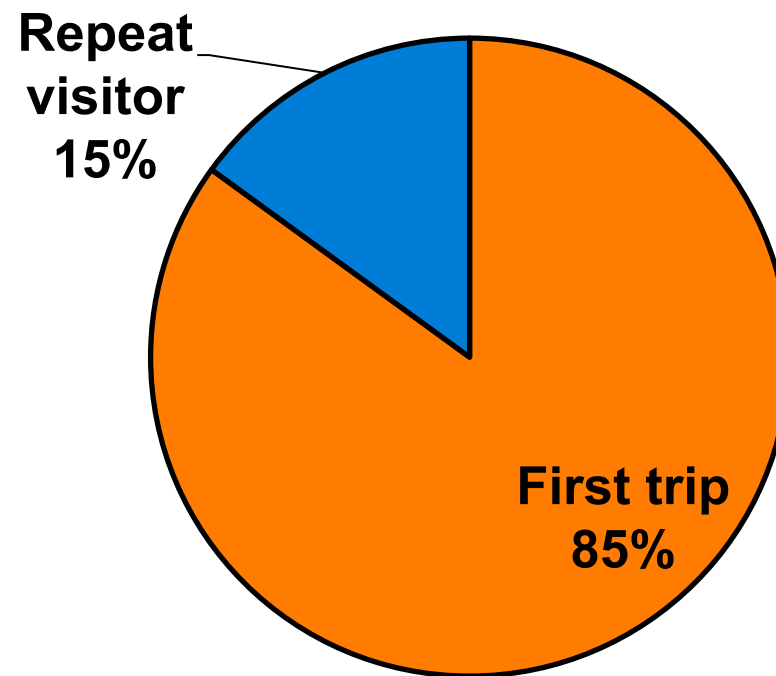
Number of Children Travel Party

N=130 total respondents traveling with children.

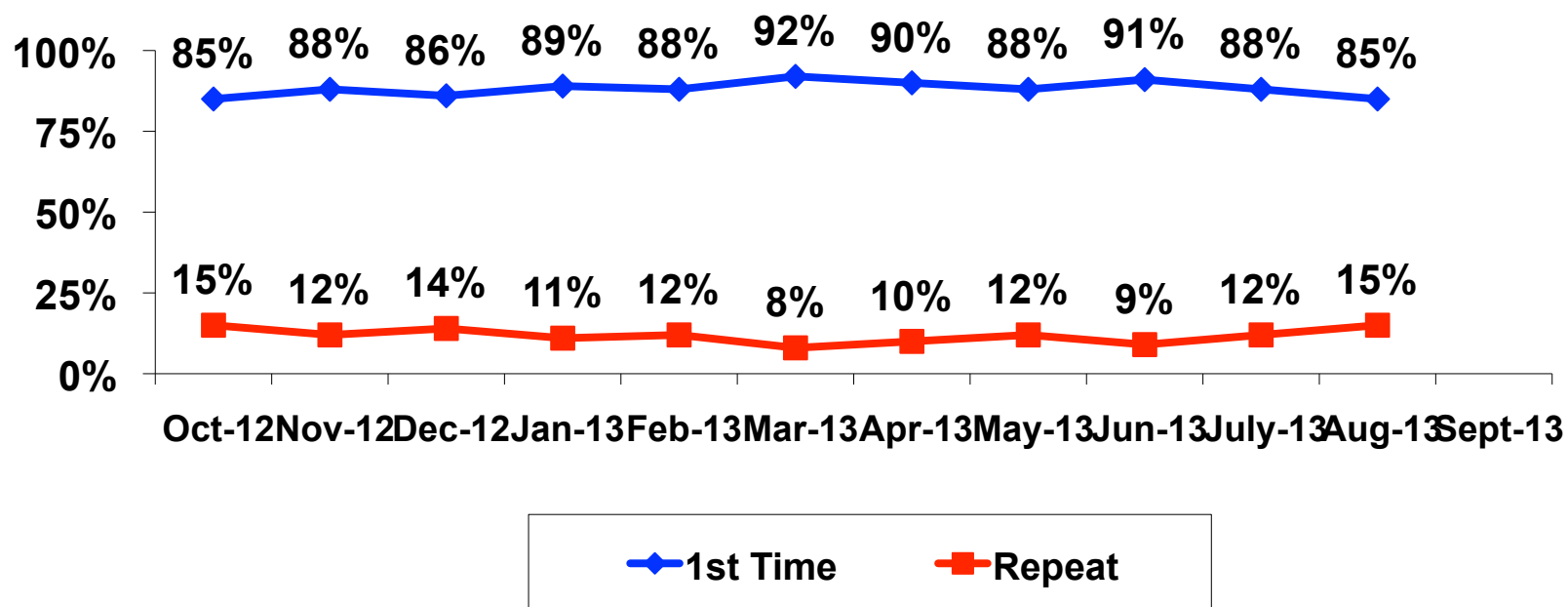
(Of those N=130 respondents, there is a total of 201 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



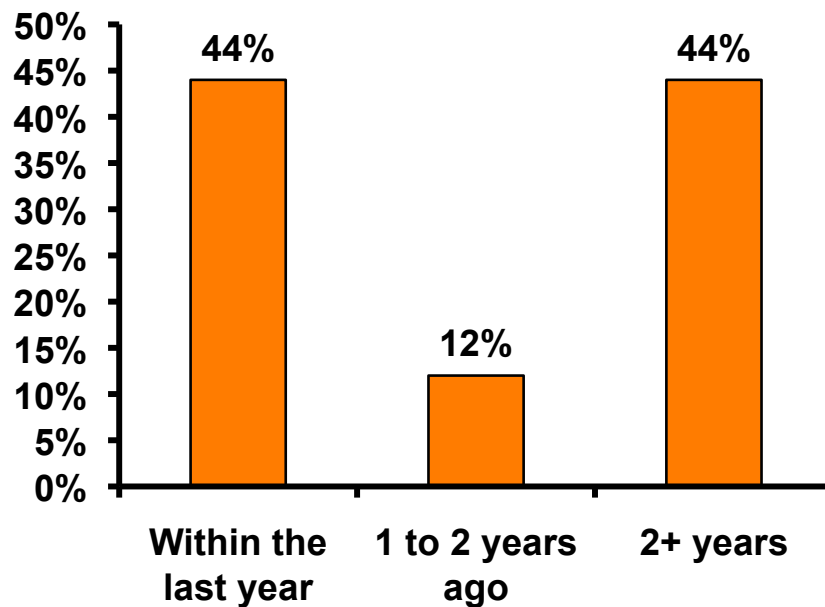
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	182	154	28
		Column N %	52%	52%	54%
	Female	Count	165	141	24
		Column N %	48%	48%	46%
AGE	Total	Count	347	295	52
	18-24	Count	11	9	2
		Column N %	3%	3%	4%
	25-34	Count	185	158	27
		Column N %	53%	54%	52%
	35-49	Count	139	120	19
		Column N %	40%	41%	37%
	50+	Count	12	8	4
		Column N %	3%	3%	8%
	Total	Count	347	295	52

- Repeat visitors and 1st time visitors mirror each other in this month

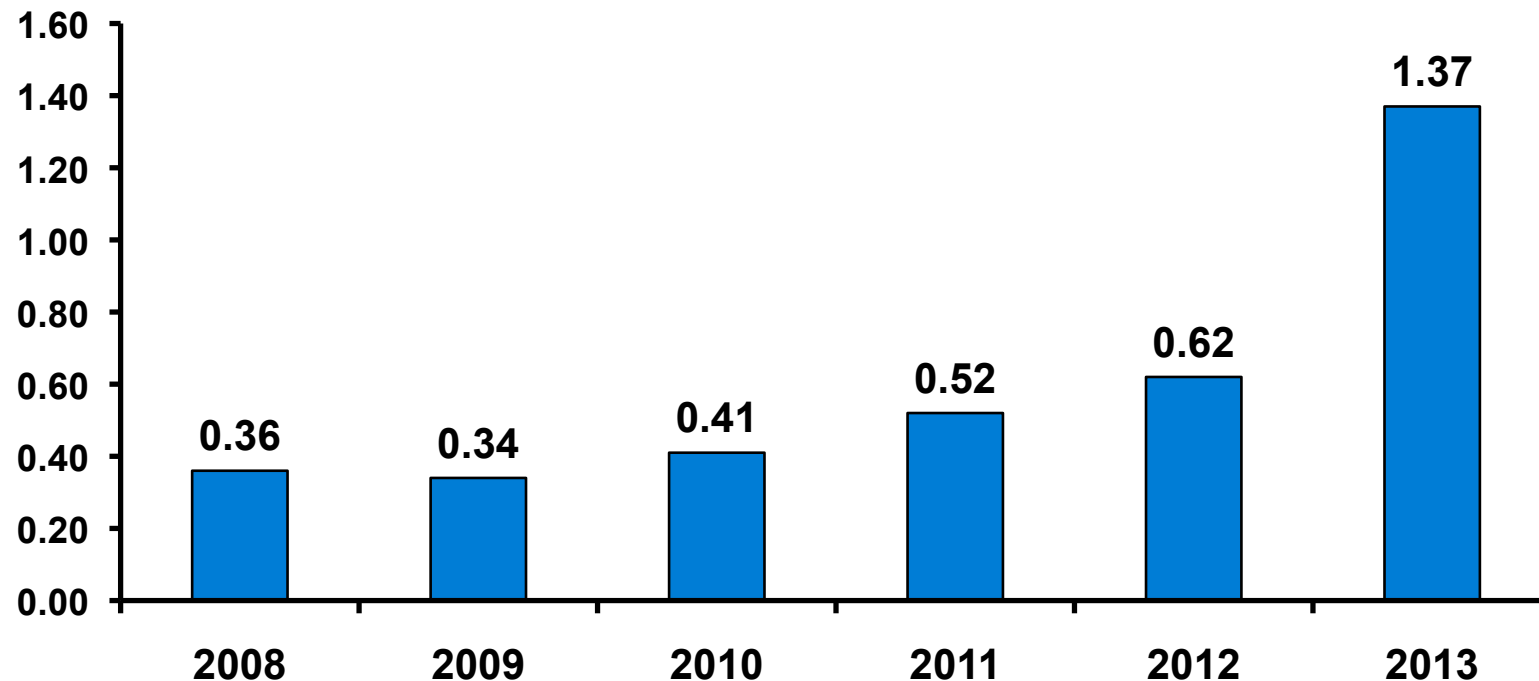
Repeat Visitors Last Trip

n = 50



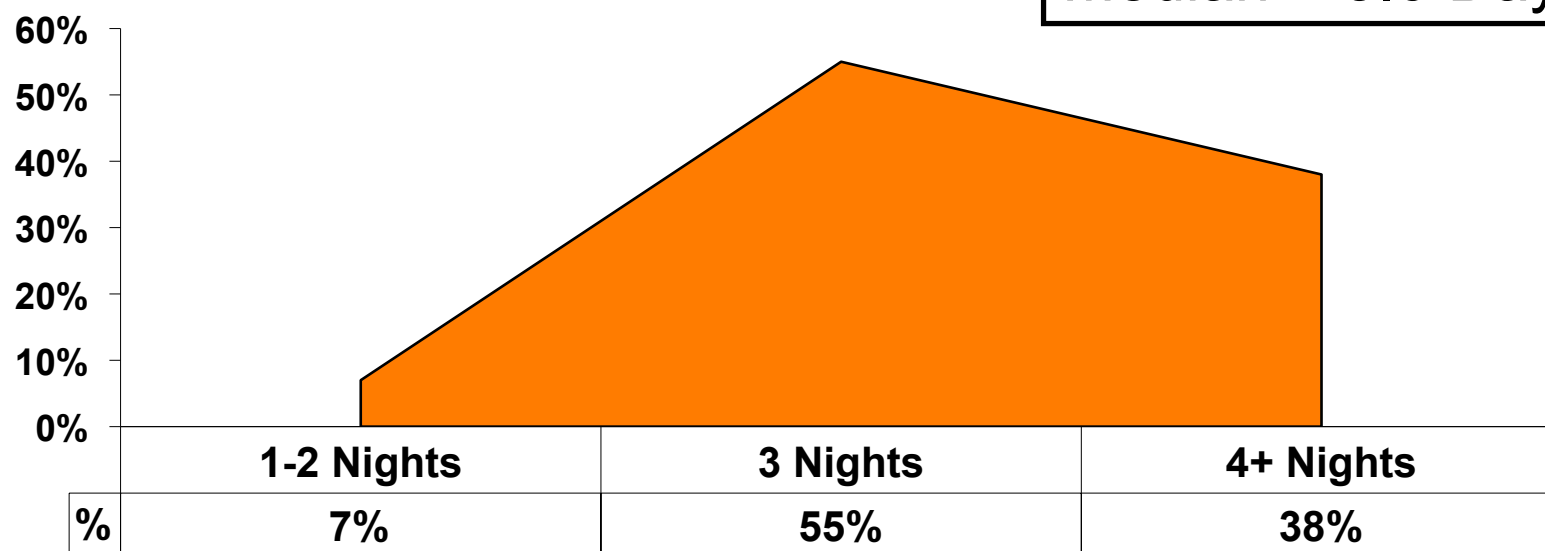
- The average repeat visitor has been to Guam 2.60 times.
- Half of repeat visitors have been here within the last year.

Average Number Overnight Trips (2008-2013) (2 nights or more)

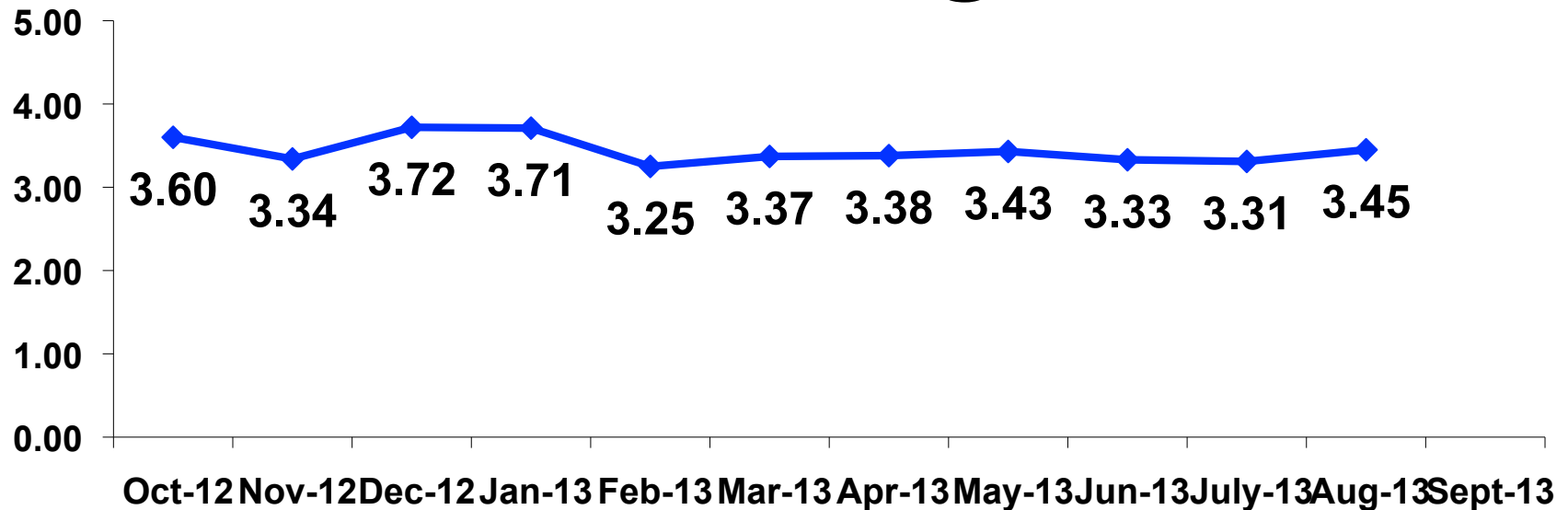


Length of Stay

Mean = 3.45 Days
Median = 3.0 Days



Average Length of Stay Tracking

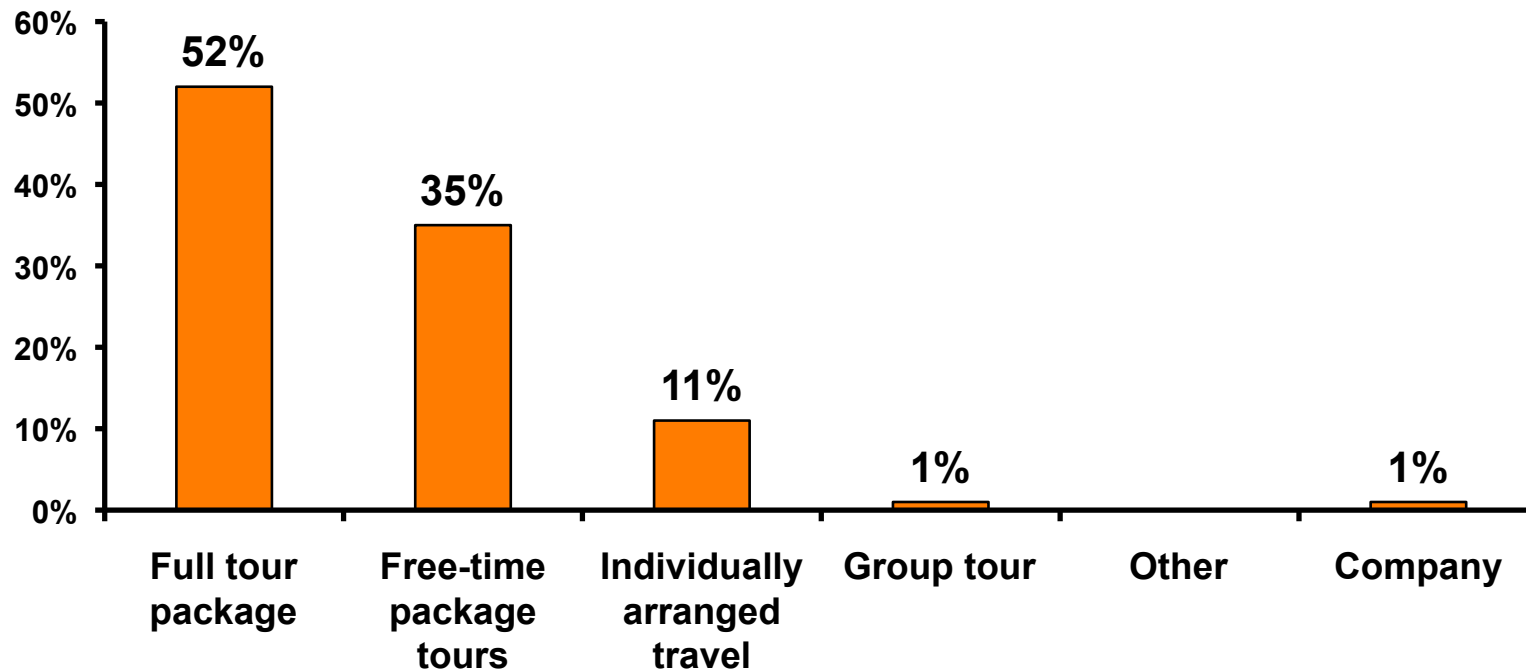


Occupation by Income

		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	31%	4%	17%	37%	37%	46%	28%	39%
	Housewife/ Homemaker	14%		20%	6%	19%	8%	16%	50%
	Student	12%	84%	40%	2%				25%
	Professional/ Specialist/ Tech	11%		3%	8%	13%	19%	16%	16%
	Self-employed	11%		6%	11%	12%	8%	16%	13%
	Manager/ Admin	4%			6%	4%		3%	13%
	Service worker/ Private hse worker	3%		3%	10%	2%	3%		
	Professor/ Teacher/ After-school	3%			2%	4%		6%	4%
	Govt- Executive	2%			6%	2%		3%	1%
	Govt- Manager	2%			3%	2%	3%	6%	1%
	Other	2%			5%	2%	3%	3%	
	Skilled worker	2%			3%		5%		3%
	Sales worker/ Clerical	2%	12%	3%		2%		3%	
	Govt- office worker non-mgr	1%		6%		2%	3%		
	Freelancer	1%		3%			3%		
	Unemployed	0%			2%				
	Total Count	338	25	35	63	52	37	32	75 8

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

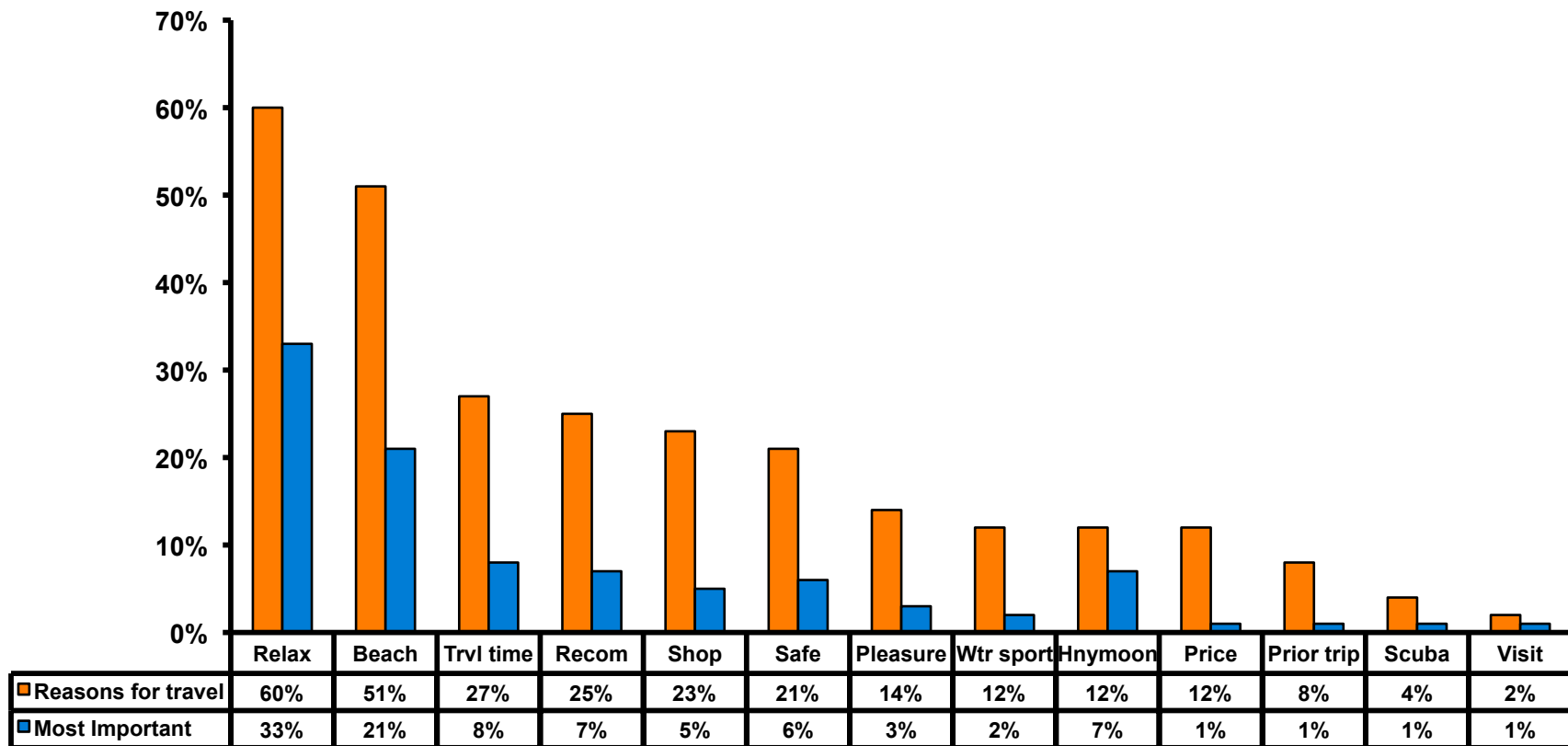


Accommodation by Income

Average length of stay: 3.45 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	49%	52%	49%	34%	37%	35%	59%	70%	38%
	Hyatt Regency Guam	16%	28%	23%	23%	10%	19%	13%	9%	13%
	Sheraton Laguna Guam	7%	4%	3%	7%	16%	3%	9%	4%	25%
	Outrigger Guam Resort	6%	4%	9%	10%	14%	5%		4%	
	Hotel Nikko Guam	4%			5%	4%	8%	9%	4%	
	Hilton Guam Resort	4%		6%	7%	2%	8%		1%	
	Onward Beach Resort	3%	4%		5%			3%	4%	13%
	Holiday Resort Guam	3%		3%	7%	4%	5%			
	Westin Resort Guam	2%		3%		4%	3%	3%	3%	
	Home stay/ friend/ relative	2%		3%		4%	5%		1%	
	Guam Plaza Hotel	1%			2%	2%	3%			
	Guam Marriott Resort	1%	8%		2%					13%
	Other	1%				2%		3%		
	Leo Palace Resort	1%				2%	3%			
	Bayview Hotel	0%					3%			
	Guam Aurora Resort	0%		3%						
	Total Count	346	25	35	61	51	37	32	76	8

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Relaxation,
- Guam's natural beauty/ beaches and
- Travel time

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	60%	36%	62%	59%	67%	62%	57%
	Natural beauty	51%	45%	51%	50%	58%	50%	52%
	Short travel time	27%	18%	24%	31%	25%	22%	32%
	Recomm- friend/family/trvl agnt	25%	27%	23%	28%	25%	26%	25%
	Shopping	23%	18%	30%	15%		17%	28%
	Safe	21%	36%	14%	28%	25%	17%	25%
	Pleasure	14%	9%	13%	13%	25%	13%	14%
	Water sports	12%		10%	16%	8%	12%	13%
	Honeymoon	12%	27%	18%	4%		11%	13%
	Price	12%	9%	16%	7%		9%	13%
	Previous trip	8%	9%	7%	8%	25%	10%	7%
	Scuba	4%		5%	3%		4%	4%
	Visit friends/ Relatives	2%		2%	2%	8%	2%	3%
	Other	2%		2%	2%		3%	1%
	Company/ Business Trip	1%		2%	1%	8%	1%	2%
	Organized sports	1%			3%		1%	2%
	Company Sponsored	1%		2%	1%		1%	1%
	Golf	1%		1%	1%		1%	1%
	Career Cert/ Testing	1%		1%			1%	1%
	Married/ Attn wedding	0%		1%			1%	
	Total	Count	346	11	182	138	12	180

Motivation 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
Q5A	Relax	60%	68%	50%	63%	45%	64%	69%	70%	38%
	Natural beauty	51%	68%	47%	45%	39%	50%	50%	62%	50%
	Short travel time	27%	12%	29%	27%	20%	19%	34%	34%	38%
	Recomm- friend/family/trvl agnt	25%	52%	21%	31%	20%	8%	19%	24%	63%
	Shopping	23%	20%	18%	27%	20%	22%	41%	17%	50%
	Safe	21%		3%	15%	24%	19%	38%	29%	25%
	Pleasure	14%		21%	11%	16%	17%	19%	12%	13%
	Water sports	12%	12%	18%	5%	6%	11%	16%	20%	13%
	Honeymoon	12%	4%	15%	27%	16%	14%	3%		13%
	Price	12%	64%	12%	13%	10%	3%	9%	3%	13%
	Previous trip	8%	8%	9%	3%	6%	6%	13%	13%	13%
	Scuba	4%	8%	18%	3%	6%				
	Visit friends/ Relatives	2%		6%		6%	3%		1%	
	Other	2%			2%	4%		6%		13%
	Company/ Business Trip	1%			6%	2%				
	Organized sports	1%				2%		3%	3%	
	Company Sponsored	1%		3%		2%		3%	1%	
	Golf	1%					6%	3%		
	Career Cert/ Testing	1%			2%	2%				
	Married/ Attn wedding	0%					3%			
	Total Count	346	25	34	62	51	36	32	76	8

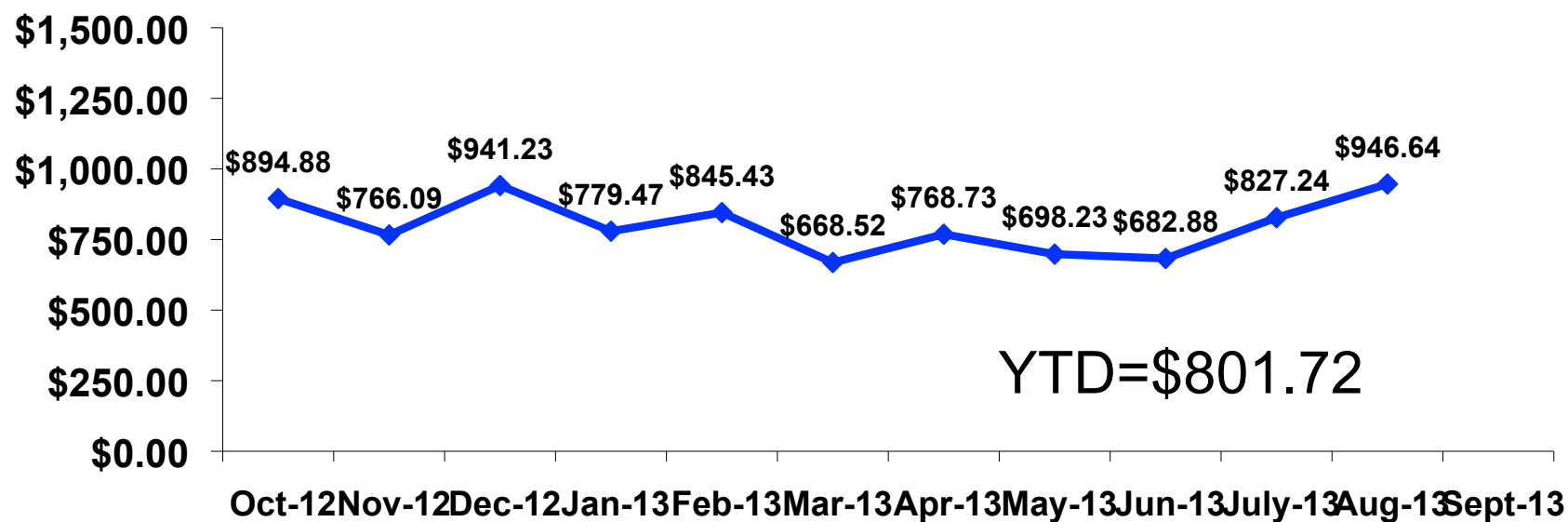
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW 1,093.66/US\$1

- \$2,133.34 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$13,715 = maximum (highest amount recorded for the entire sample)
- \$946.64 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

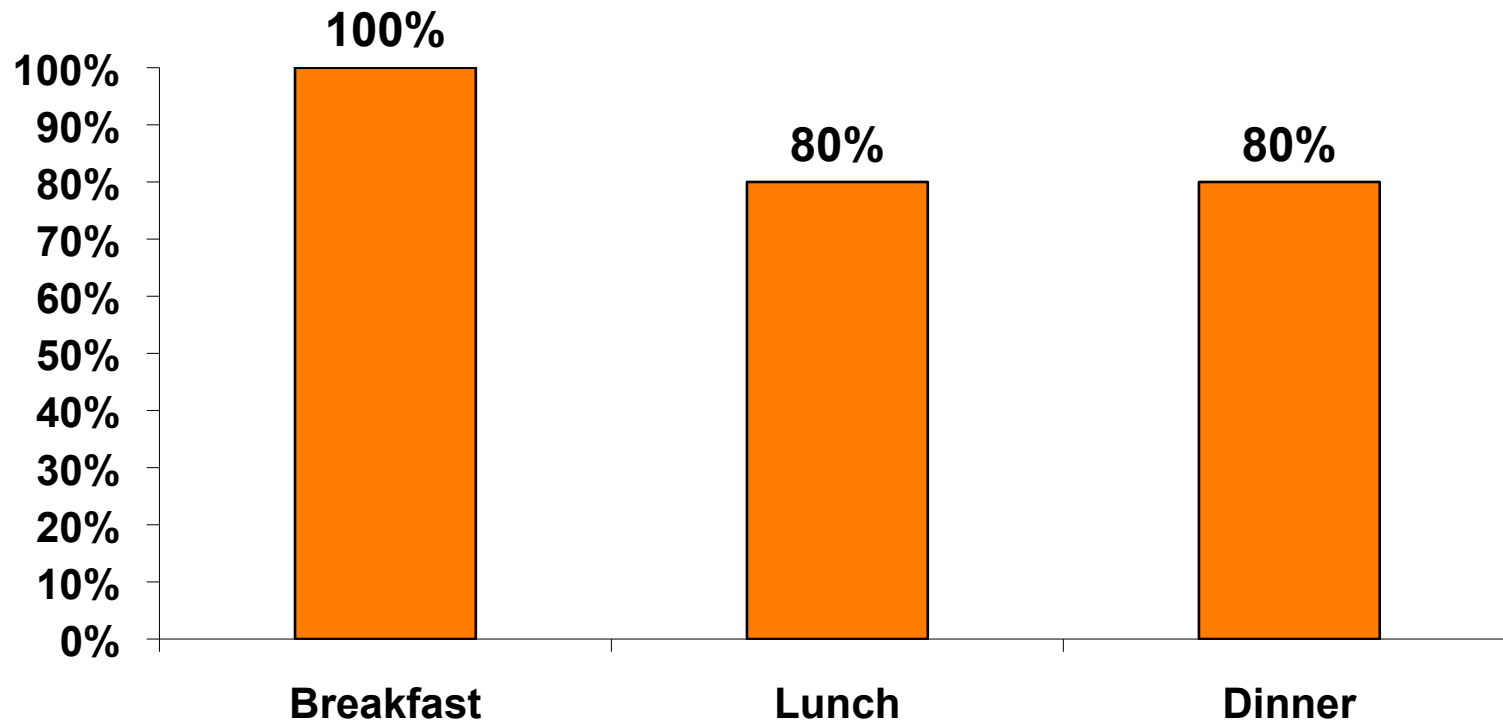
KW 1,093.66=\$1

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

	MEAN \$
Air & Accommodation package only	\$2,299.90
Air & Accommodation w/ daily meal package	\$3,150.76
Air only	\$1,562.38
Accommodation only	\$902.55
Accommodation w/ daily meal only	\$1,009.72
Food & Beverages in Hotel	\$231.64
Ground transportation – Korea	\$91.93
Ground transportation – Guam	\$97.97
Optional tours/ activities	\$309.58
Other expenses	\$174.56
Total Prepaid	\$2,264.38

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package
n=5

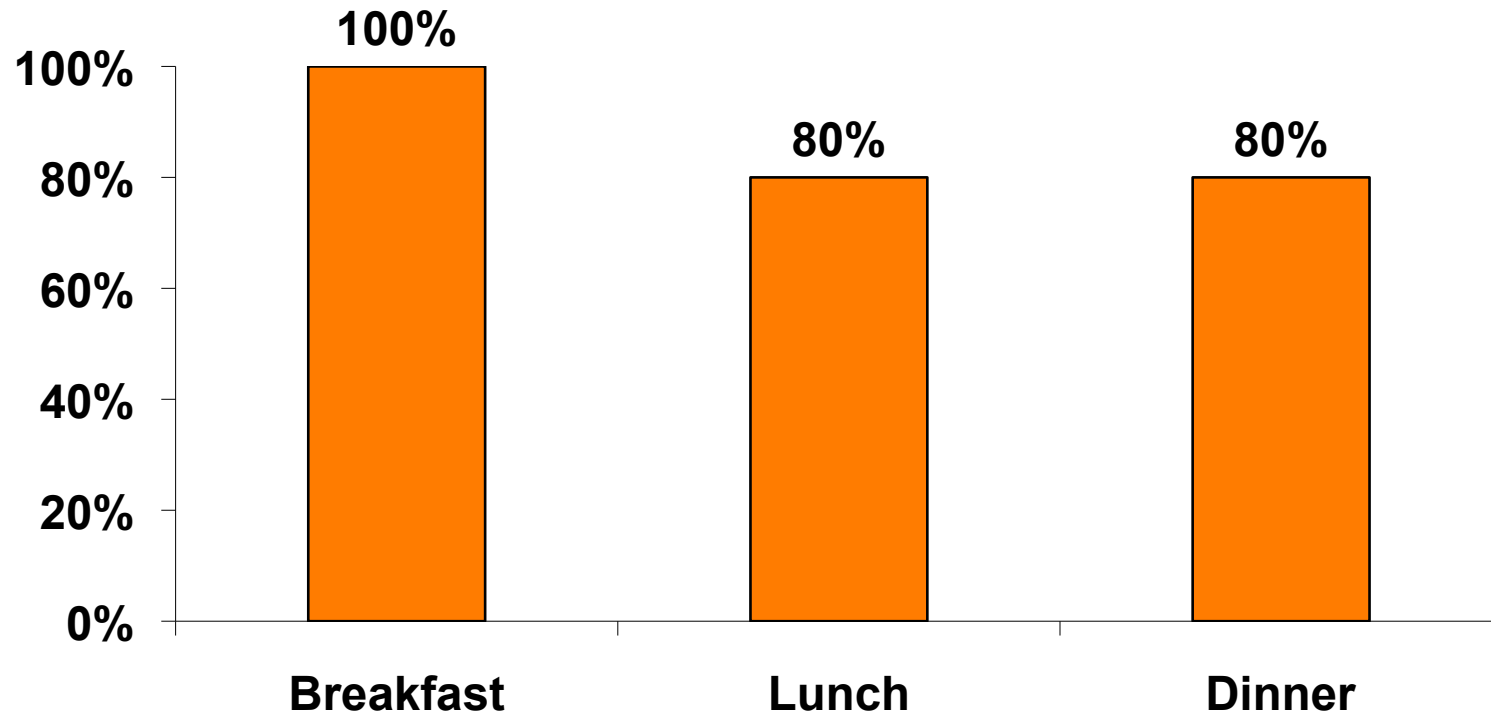


Mean=\$3,150.76 per travel party

Prepaid Meal Breakdown

Accommodations with Daily Meal Package

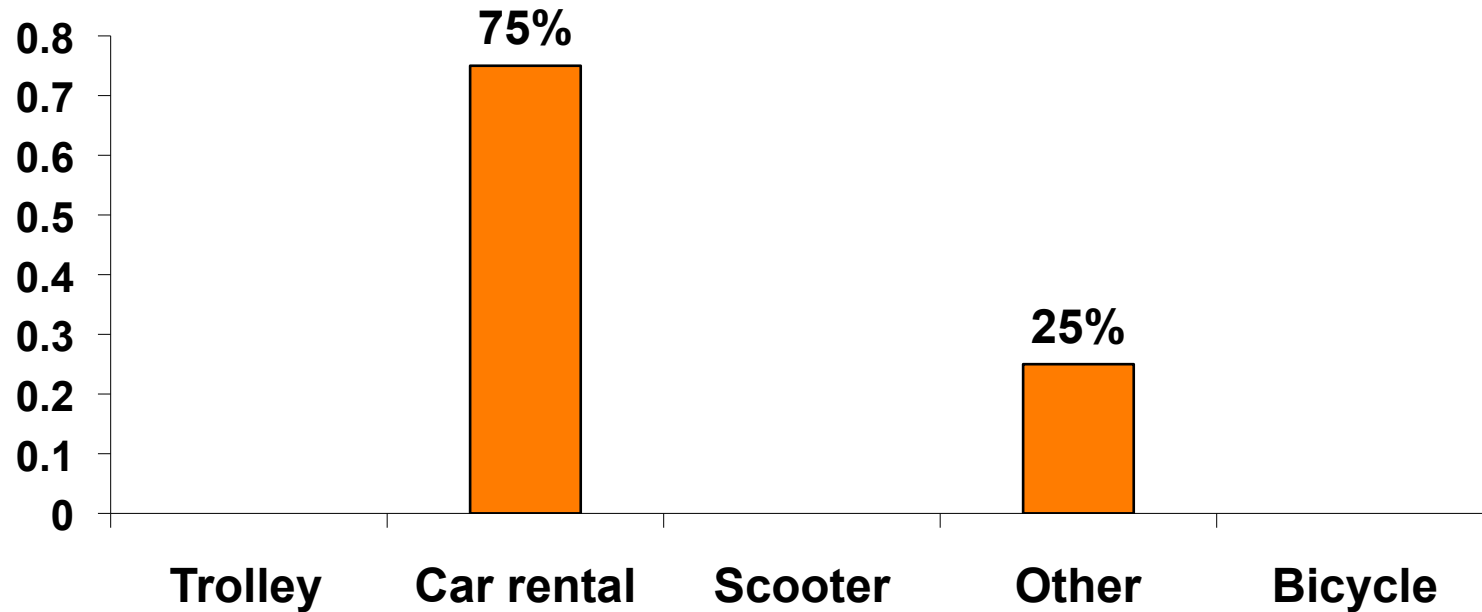
n=5



Mean=\$1,009.72 per travel party

Prepaid Ground Transportation

n=4

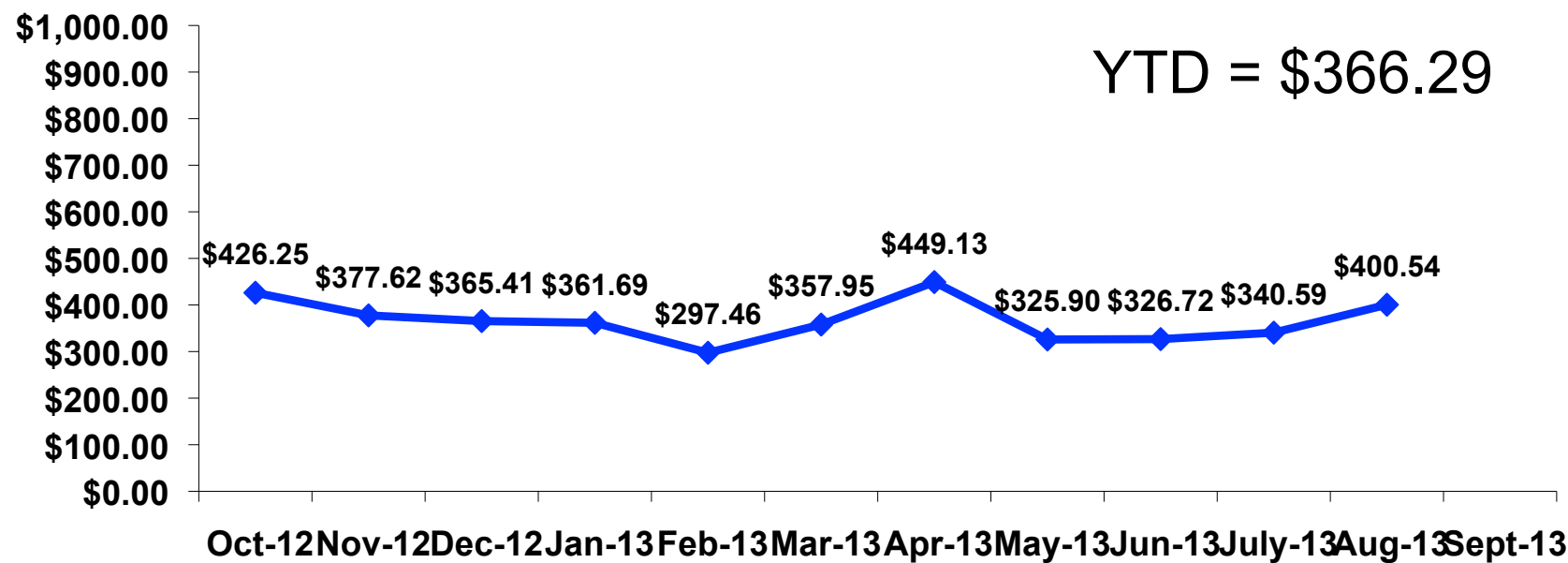


Mean=\$97.97 per travel party

On-Island Expenditures

- \$968.57 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$400.54 = overall mean average per person on-island expenditure

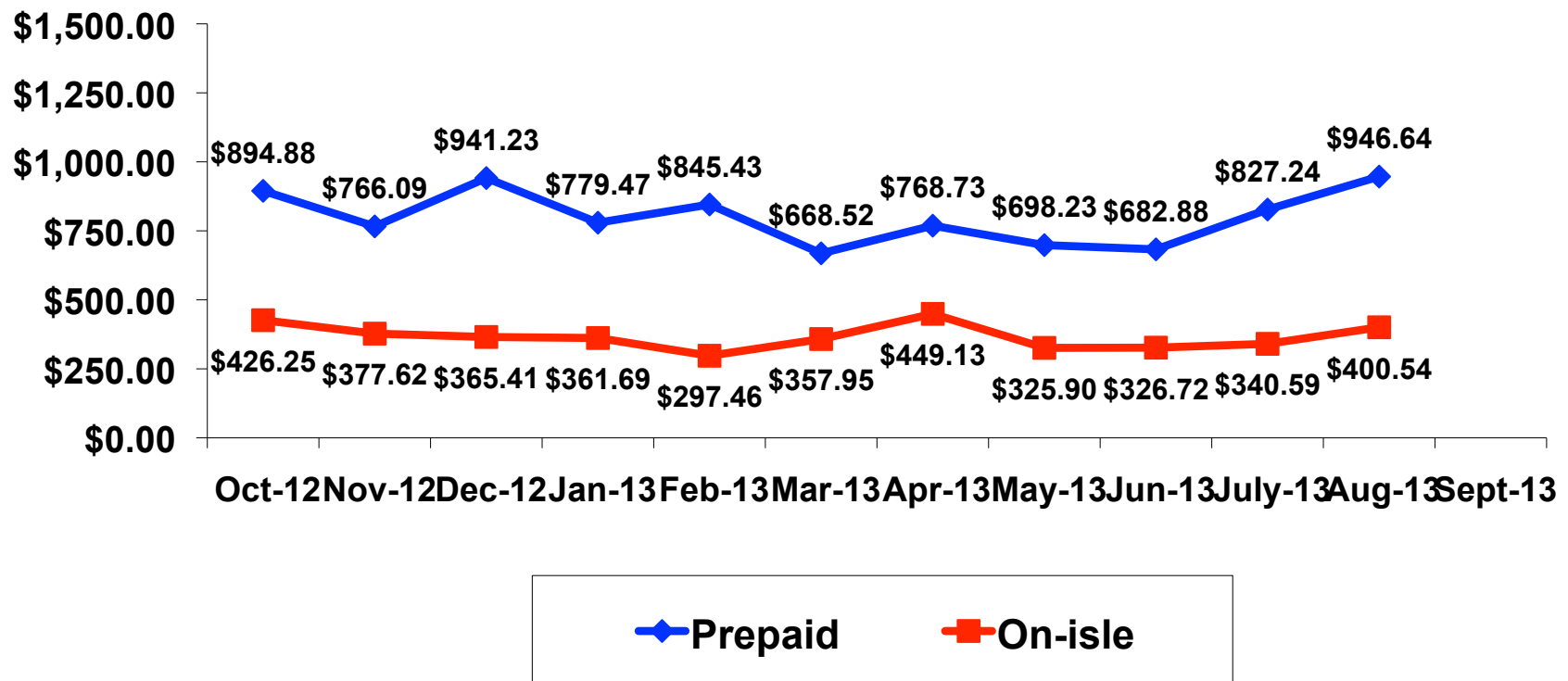
On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$801.72

On-Isle YTD = \$366.29



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	\$400.54	\$391.43	\$417.02	\$800.00	\$437.87	\$343.64	\$333.58	\$556.48	\$442.68	\$326.02	\$404.80
	Median	\$278	\$283	\$300	\$800	\$325	\$225	\$300	\$463	\$343	\$210	\$200
	Minimum	\$0	\$0	\$0	\$200	\$0	\$0	\$0	\$0	\$0	\$0	\$150
	Maximum	\$2,250	\$2,250	\$2,000	\$1,400	\$2,250	\$1,750	\$800	\$1,500	\$2,000	\$1,750	\$1,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$91.22	\$83.08	\$101.24	\$55.45	\$62.27	\$135.94	\$75.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$45.43	\$44.88	\$46.87	\$0.91	\$46.56	\$51.94	\$5.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$69.63	\$75.24	\$64.62	\$75.45	\$70.31	\$67.40	\$97.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$117.77	\$124.82	\$112.09	\$112.73	\$114.97	\$118.13	\$190.83
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$220.38	\$209.64	\$235.74	\$24.55	\$208.06	\$260.72	\$177.50
	Median	\$0	\$0	\$0	\$0	\$0	\$80	\$0
GIFT- OTHER	Mean	\$119.33	\$102.95	\$139.27	\$79.09	\$129.46	\$115.09	\$79.17
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$48.67	\$49.08	\$48.56	\$36.82	\$48.18	\$53.76	\$20.33
	Median	\$0	\$0	\$0	\$0	\$8	\$0	\$0
OTHER	Mean	\$251.88	\$259.97	\$247.42	\$628.64	\$169.71	\$280.42	\$239.17
	Median	\$0	\$0	\$0	\$250	\$0	\$0	\$0
TOTAL	Mean	\$968.57	\$961.20	\$992.13	\$1,013.64	\$848.28	\$1,095.76	\$884.08
	Median	\$650	\$665	\$650	\$1,000	\$600	\$670	\$805

On-Island Expenditures

First Timers & Repeaters

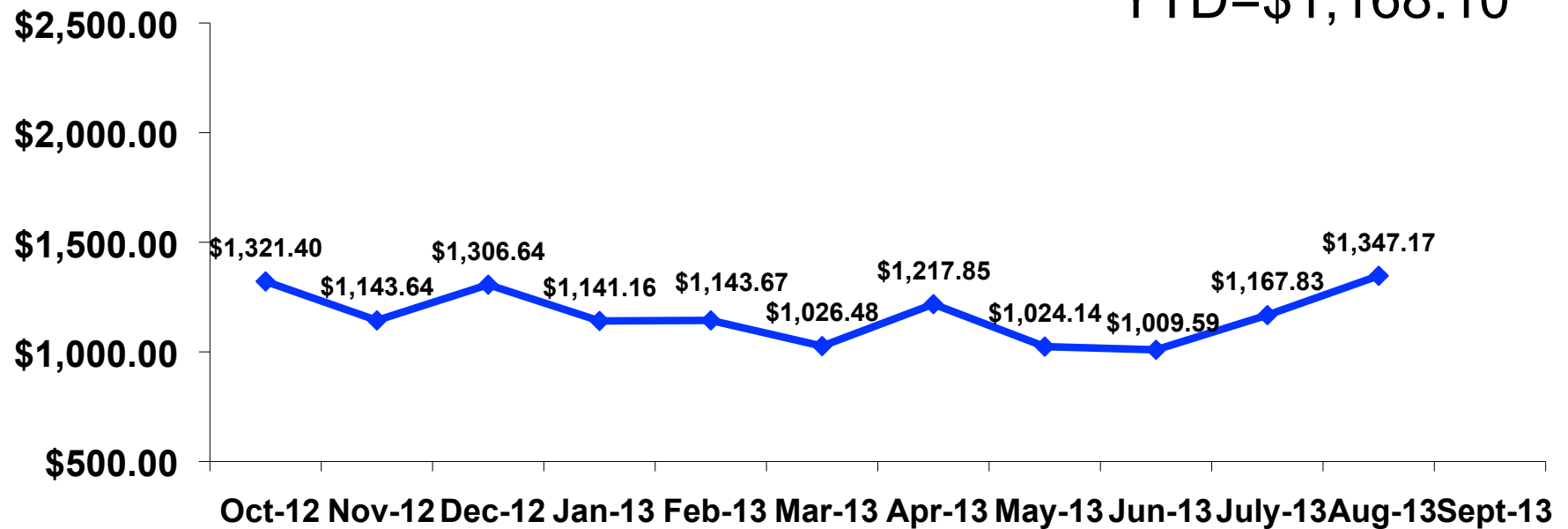
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$91.22	\$92.92	\$81.66
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$45.43	\$45.63	\$44.36
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$69.63	\$64.72	\$97.17
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$117.77	\$122.94	\$88.79
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$220.38	\$212.91	\$262.21
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$119.33	\$118.98	\$121.32
	Median	\$0	\$0	\$0
TRANS	Mean	\$48.67	\$47.97	\$52.58
	Median	\$0	\$0	\$16
OTHER	Mean	\$251.88	\$221.98	\$419.43
	Median	\$0	\$0	\$0
TOTAL	Mean	\$968.57	\$932.90	\$1,168.47
	Median	\$650	\$650	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,347.17 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$14,015 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,168.10

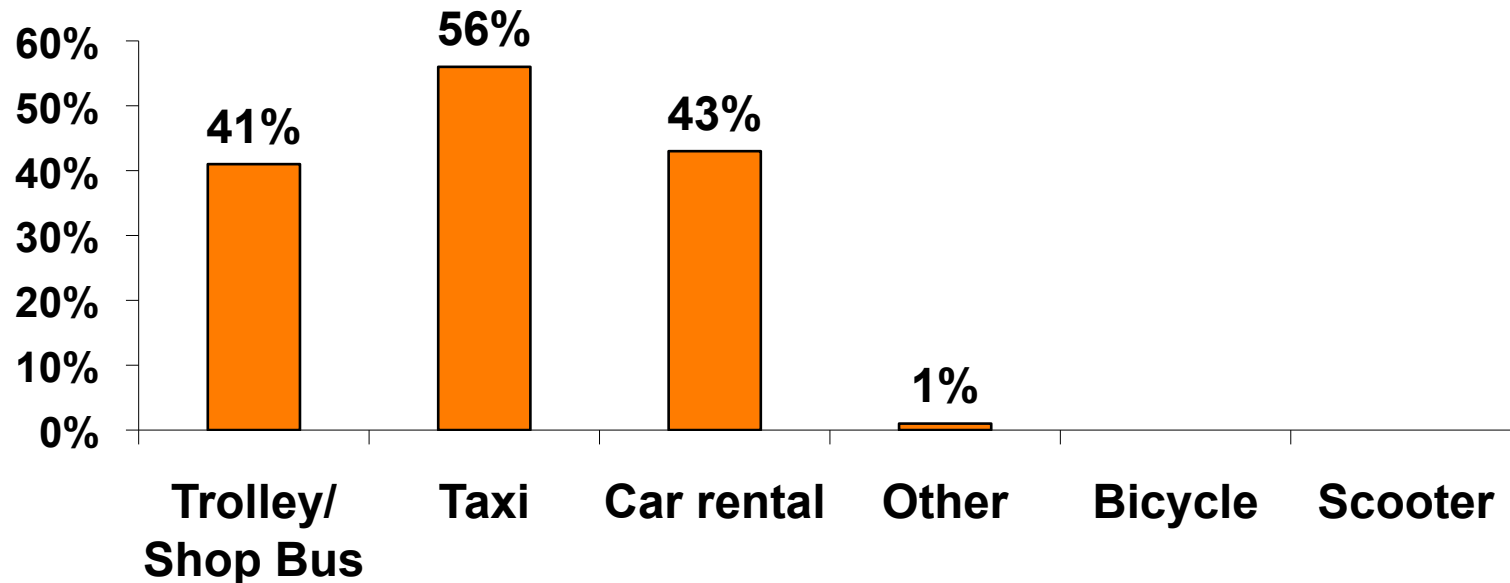


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$91.22
Food & beverage in fast food restaurant/ convenience store	\$45.43
Food & beverage at restaurants or drinking establishments outside a hotel	\$69.63
Optional tours and activities	\$117.77
Gifts/ souvenirs for yourself/companions	\$220.38
Gifts/ souvenirs for friends/family at home	\$119.33
Local transportation	\$48.67
Other expenses not covered	\$251.88
Average Total	\$968.57

Local Transportation

n=129



Mean=\$48.67 per travel party

Guam Airport Expenditures

- \$56.56 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

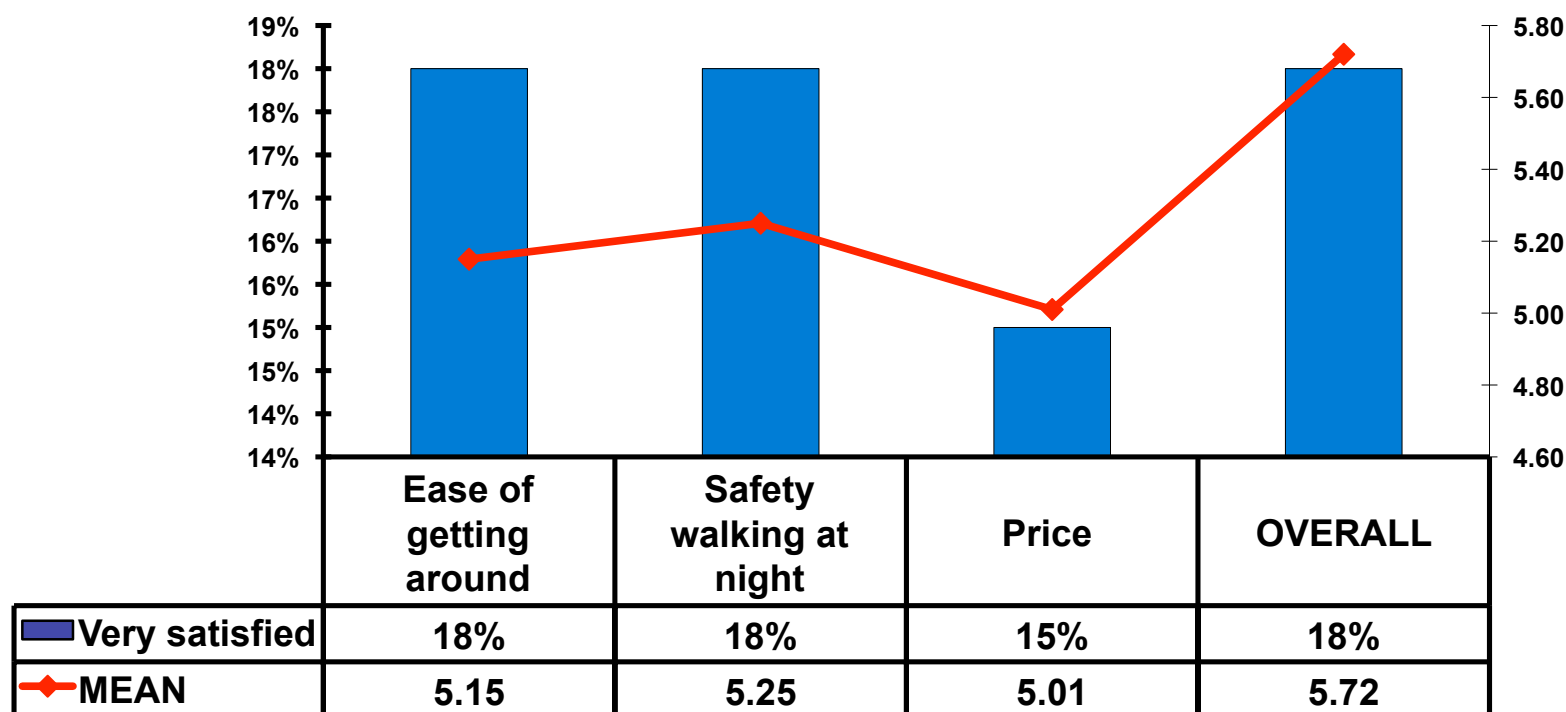
	MEAN \$
Food & Beverages	\$5.08
Gifts/Souvenirs Self	\$17.30
Gifts/Souvenirs Others	\$34.06
Total	\$56.56

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

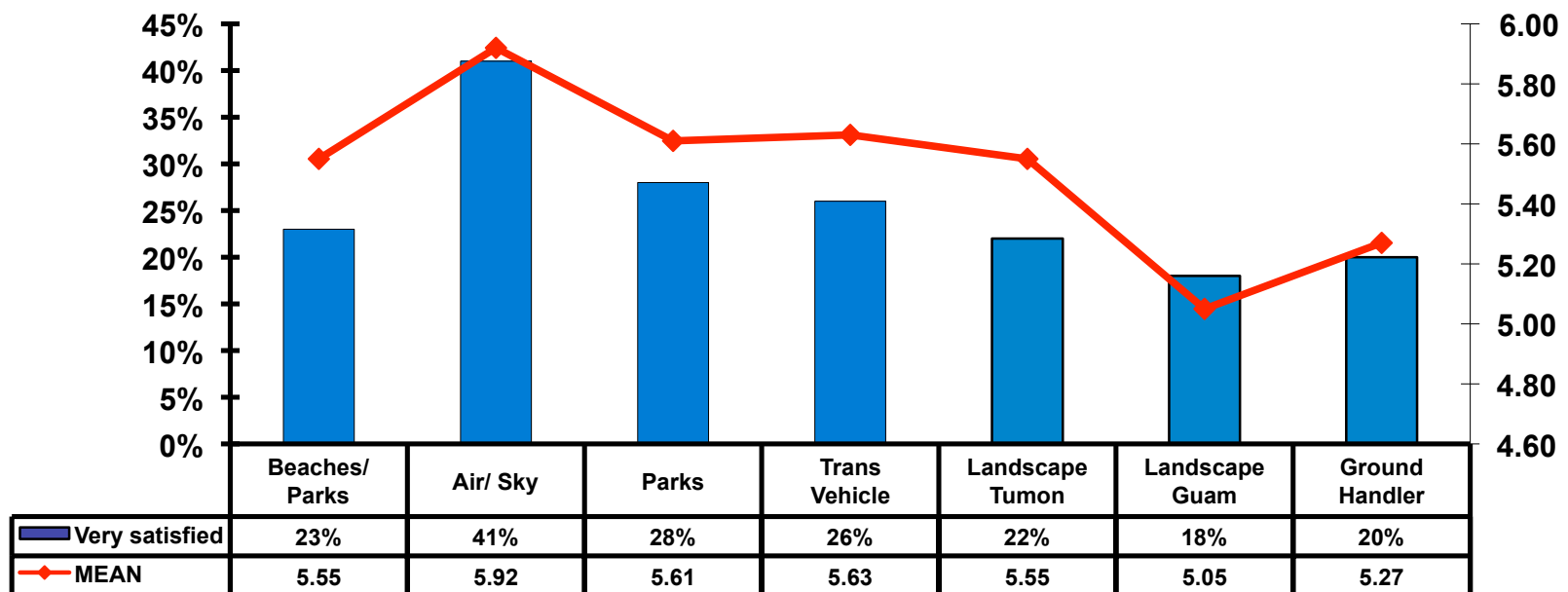
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

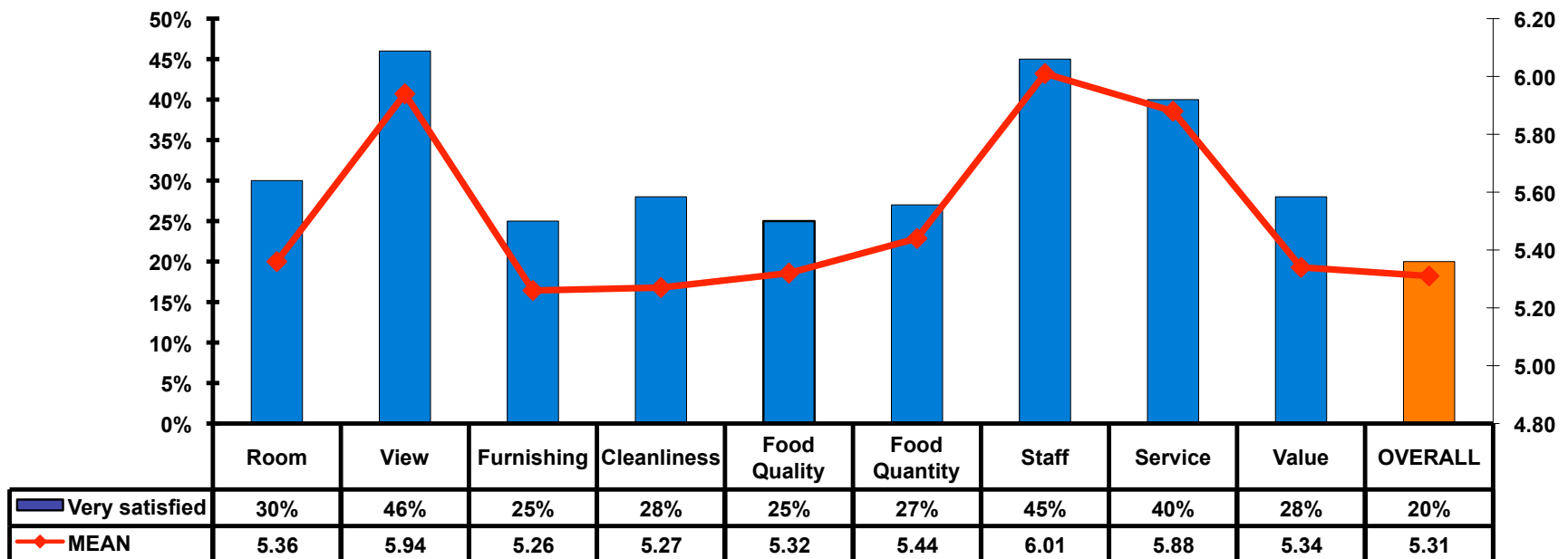
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

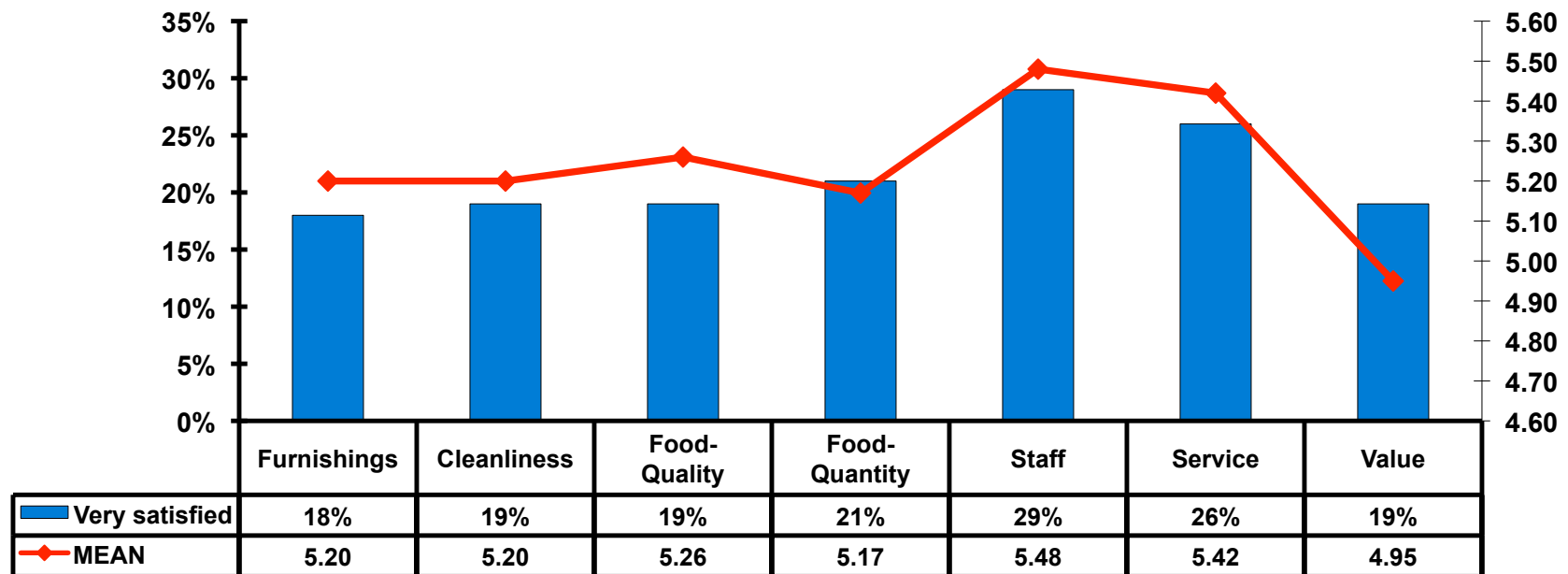
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

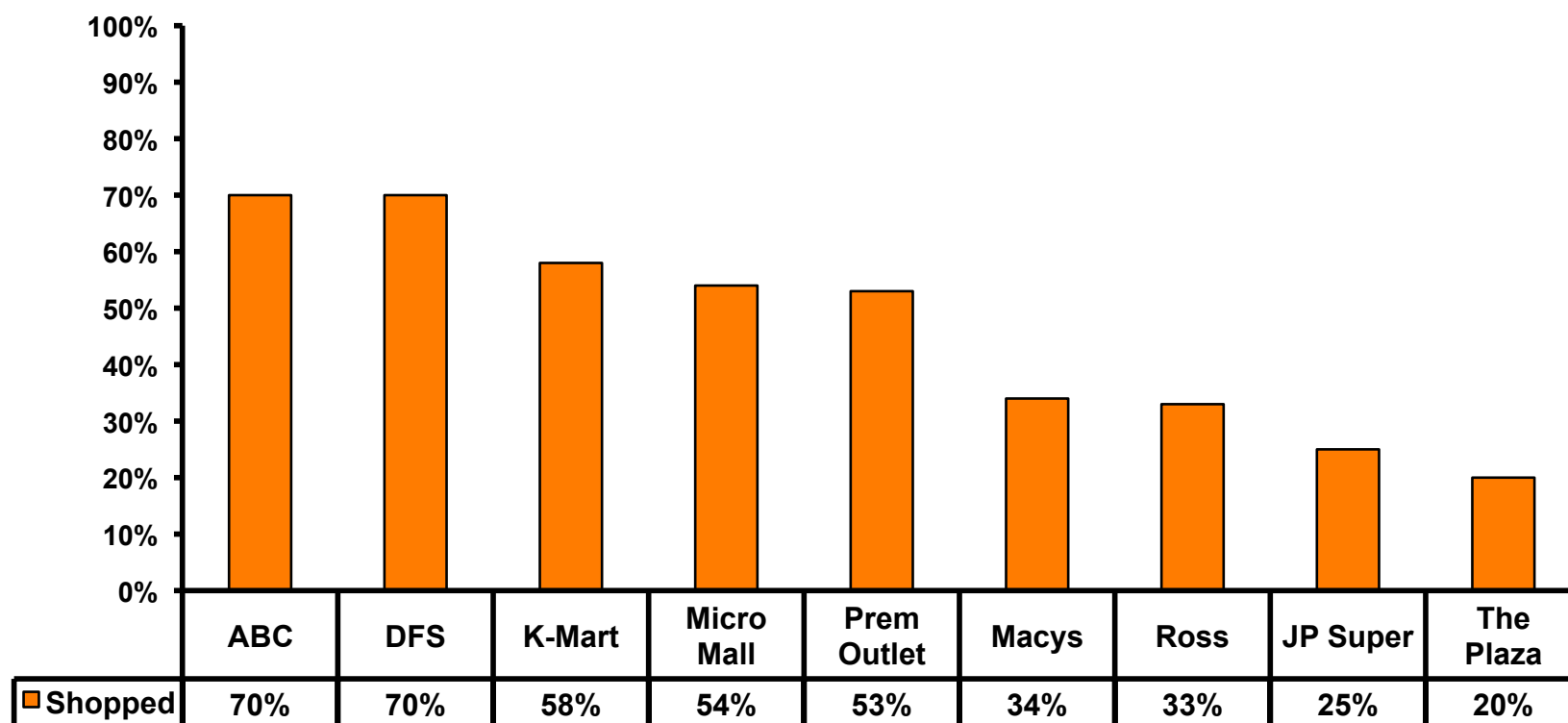
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

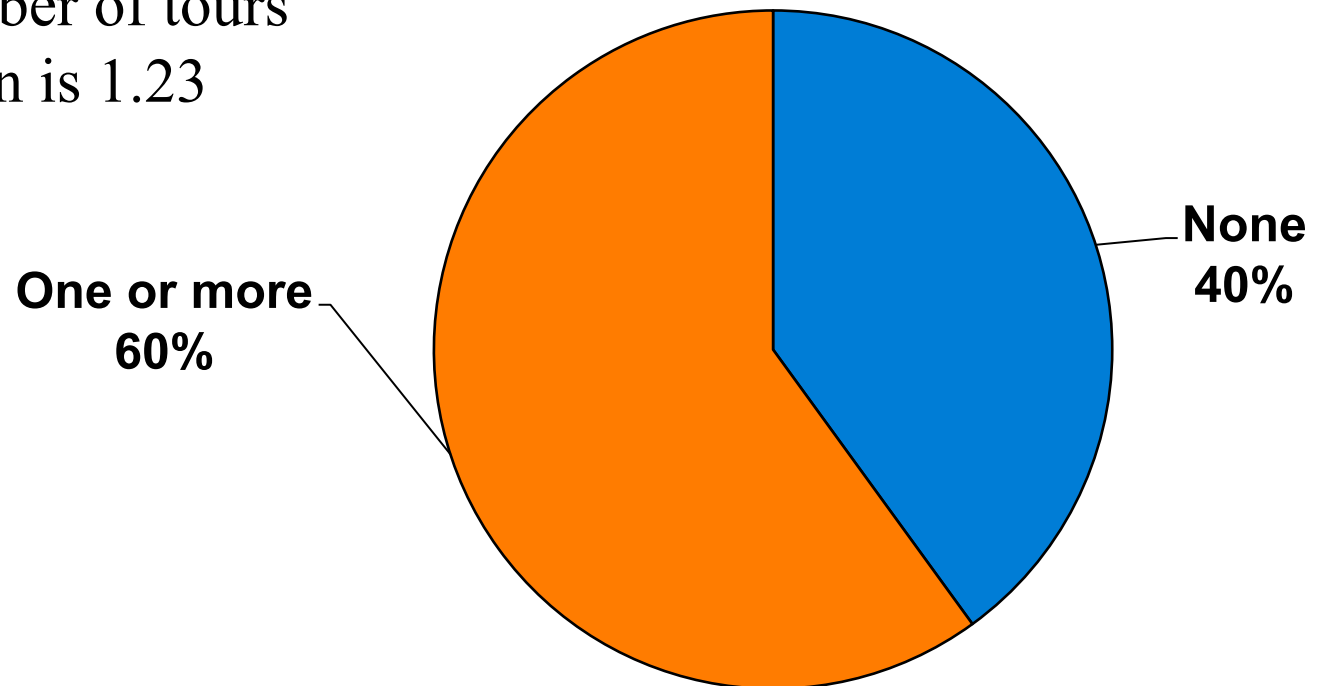
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 53%	Score of 6 to 7 = 51%
Score of 4 to 5 = 41%	Score of 4 to 5 = 41%
Score 1 to 3 = 6%	Score 1 to 3 = 8%
MEAN = 5.41	MEAN = 5.29

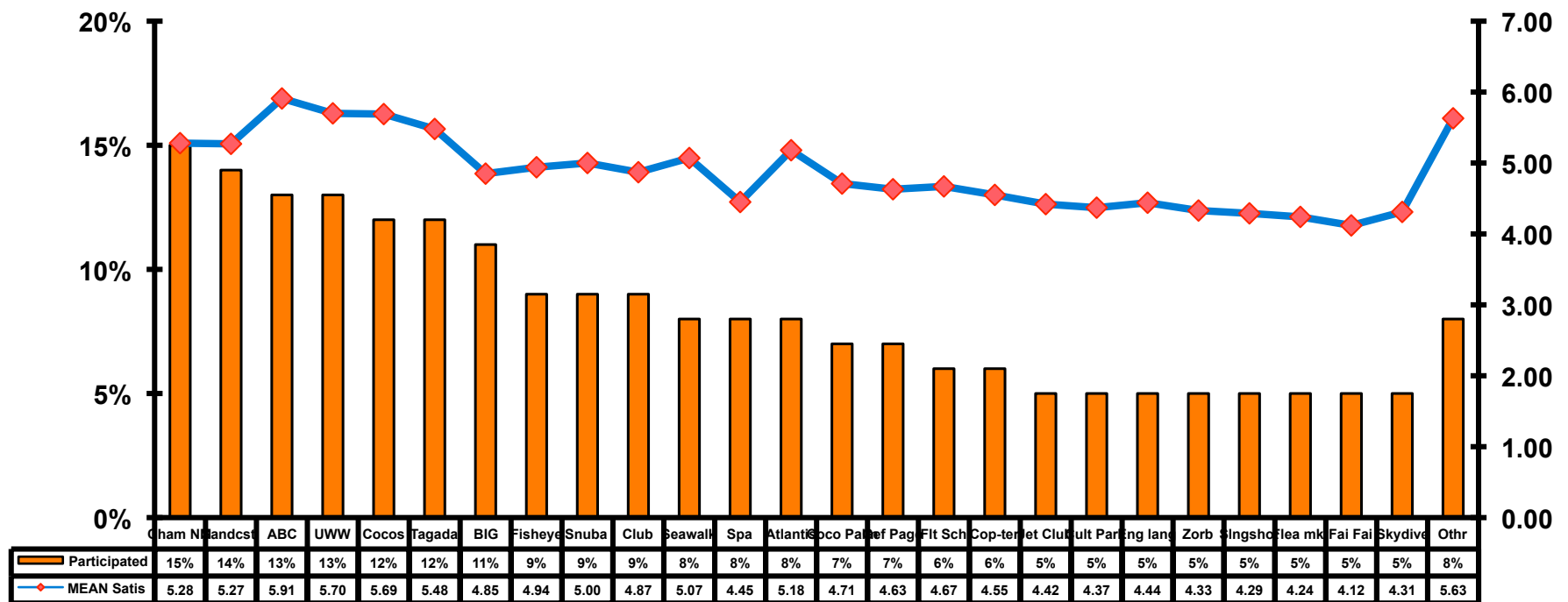
Optional Tour Participation

- Average number of tours participated in is 1.23



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 = 47%	Score of 6 to 7 = 42%
Score of 4 to 5 = 48%	Score of 4 to 5 = 49%
Score 1 to 3 = 6%	Score 1 to 3 = 10%
MEAN = 5.24	MEAN = 5.06

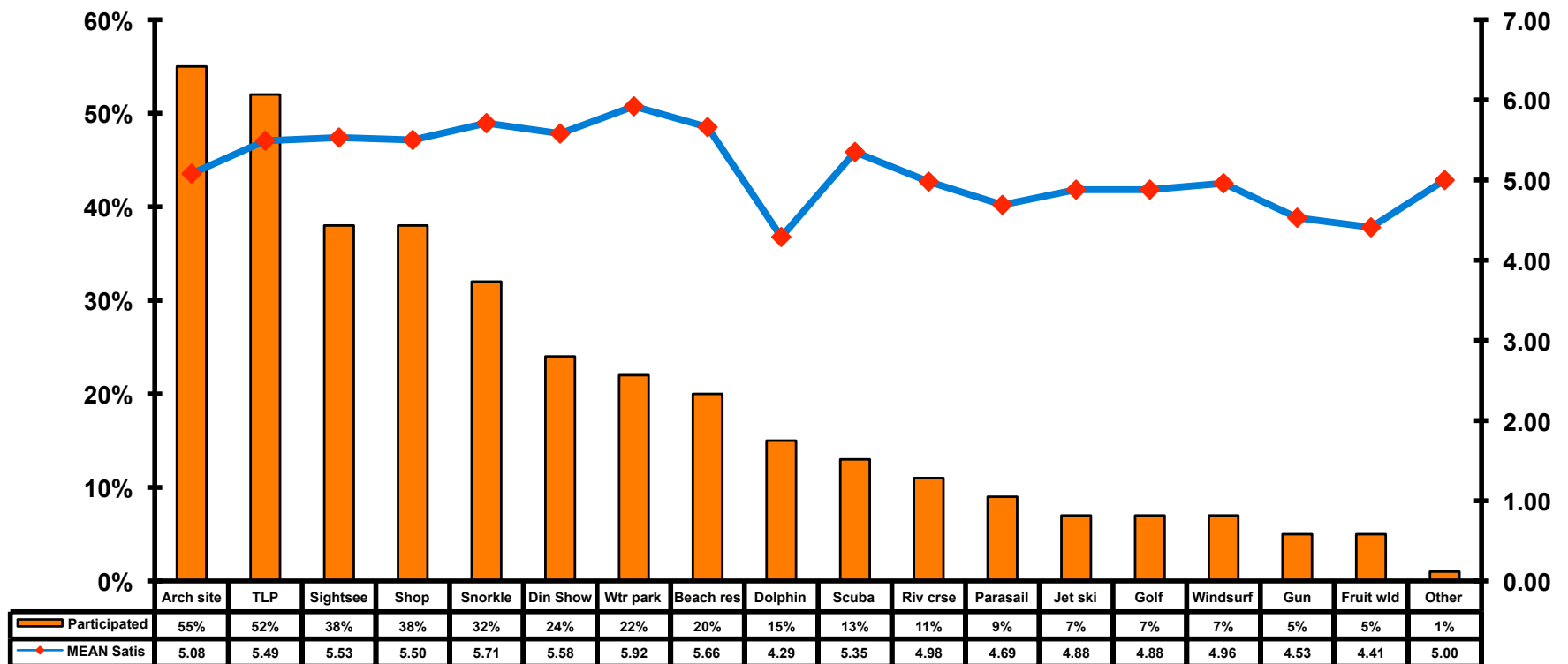
Night Tours Satisfaction

7pt Rating Scale

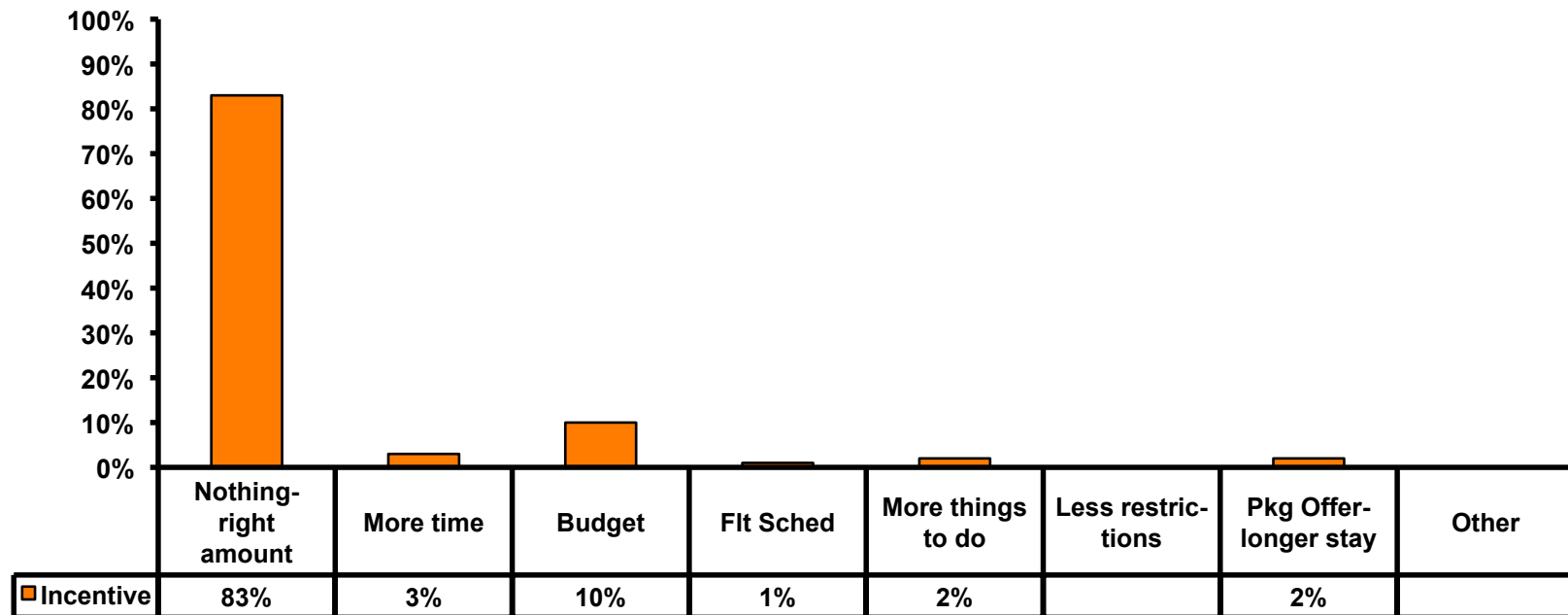
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 36%	Score of 6 to 7 = 36%
Score of 4 to 5 = 52%	Score of 4 to 5 = 52%
Score 1 to 3 = 12%	Score 1 to 3 = 12%
MEAN = 4.84	MEAN = 4.84

Satisfaction with Other Activities



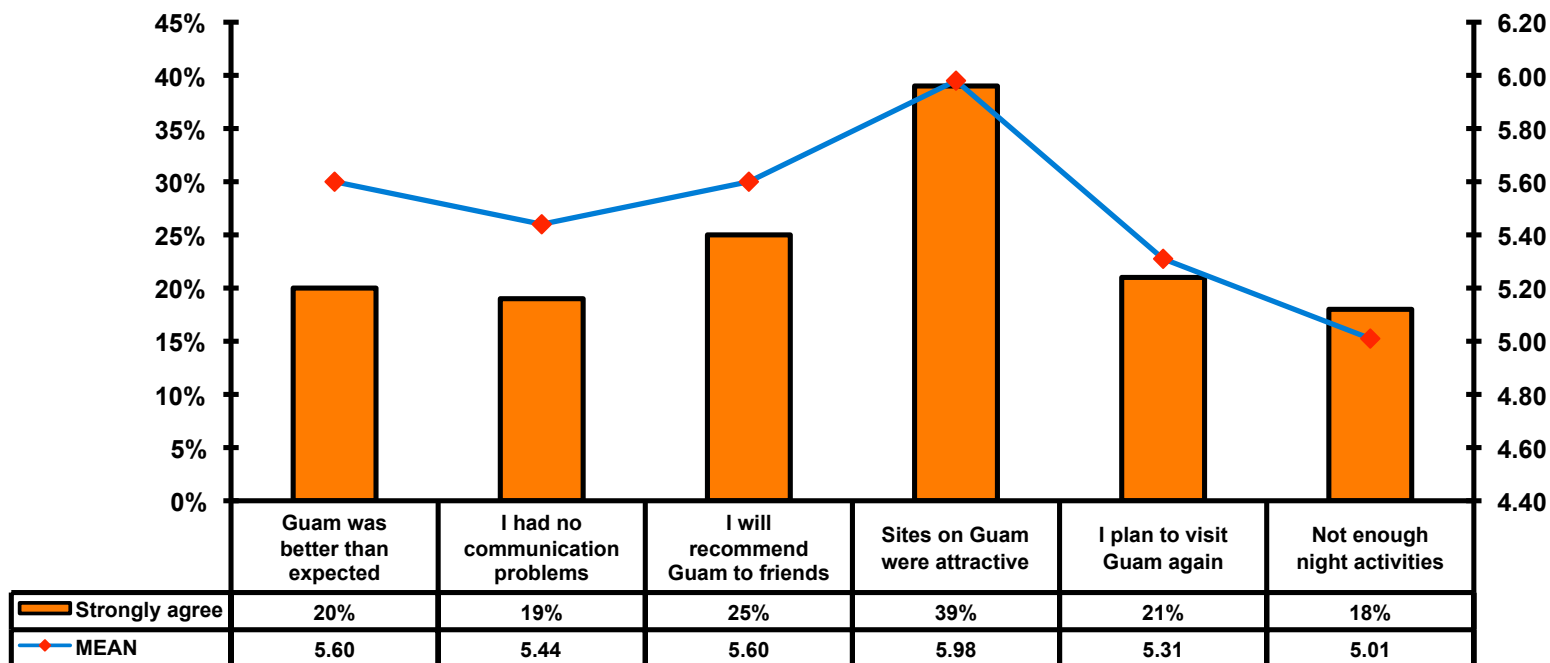
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

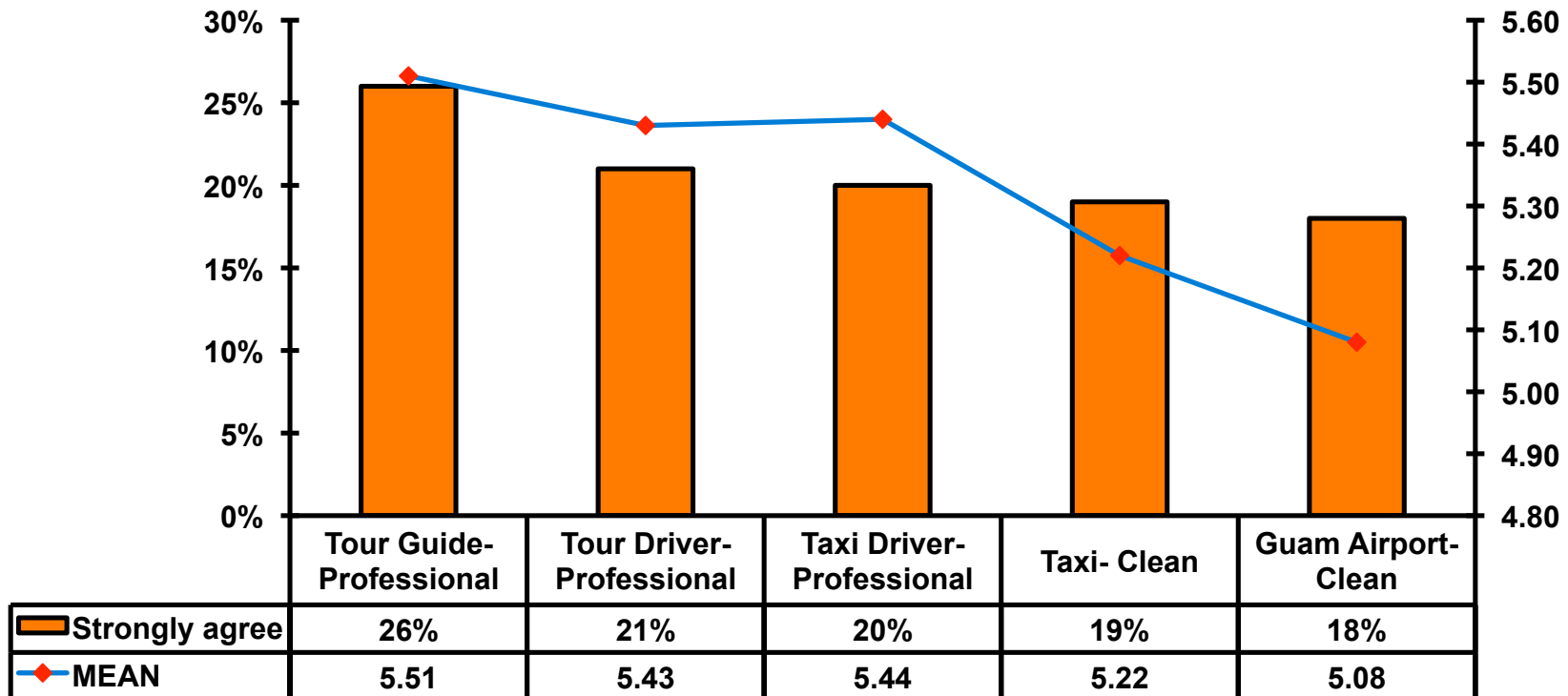
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

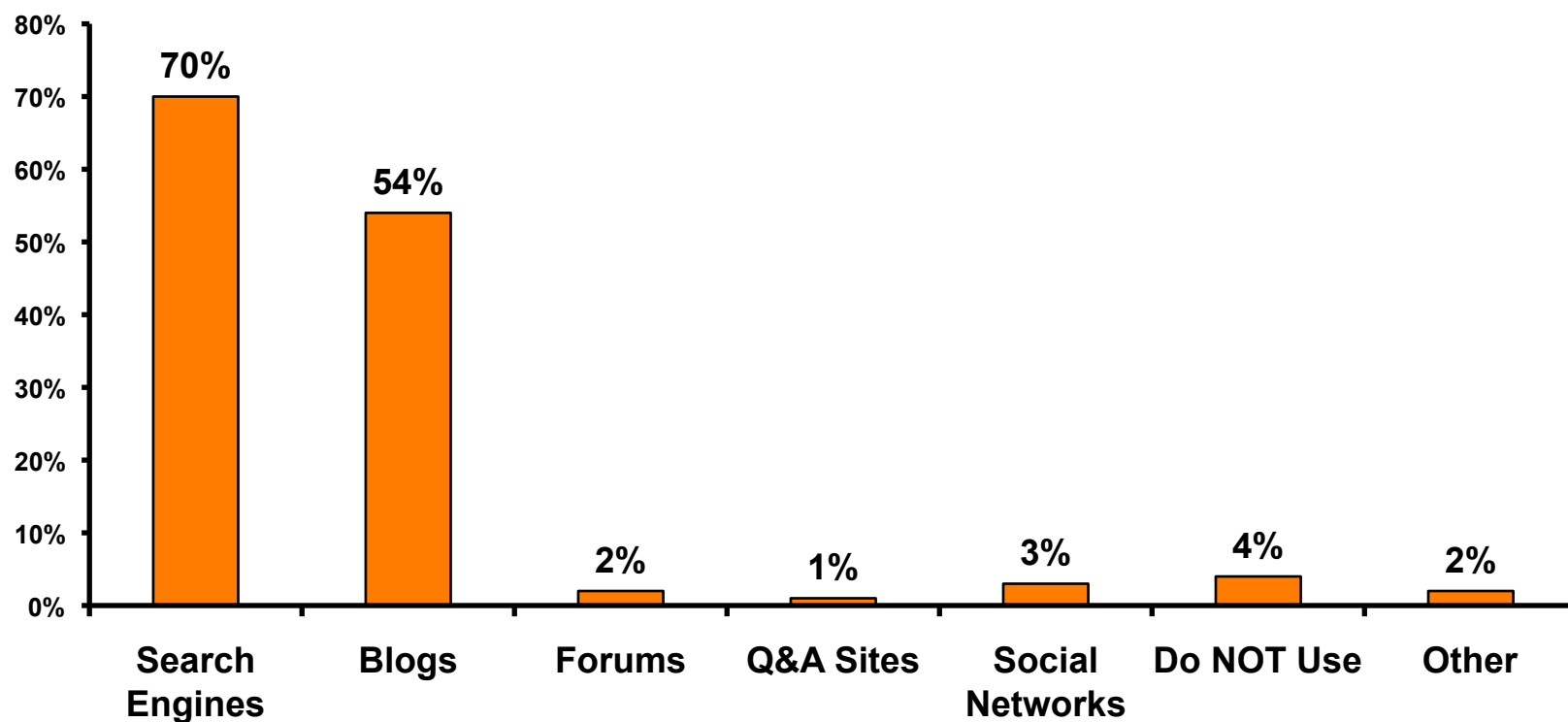
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



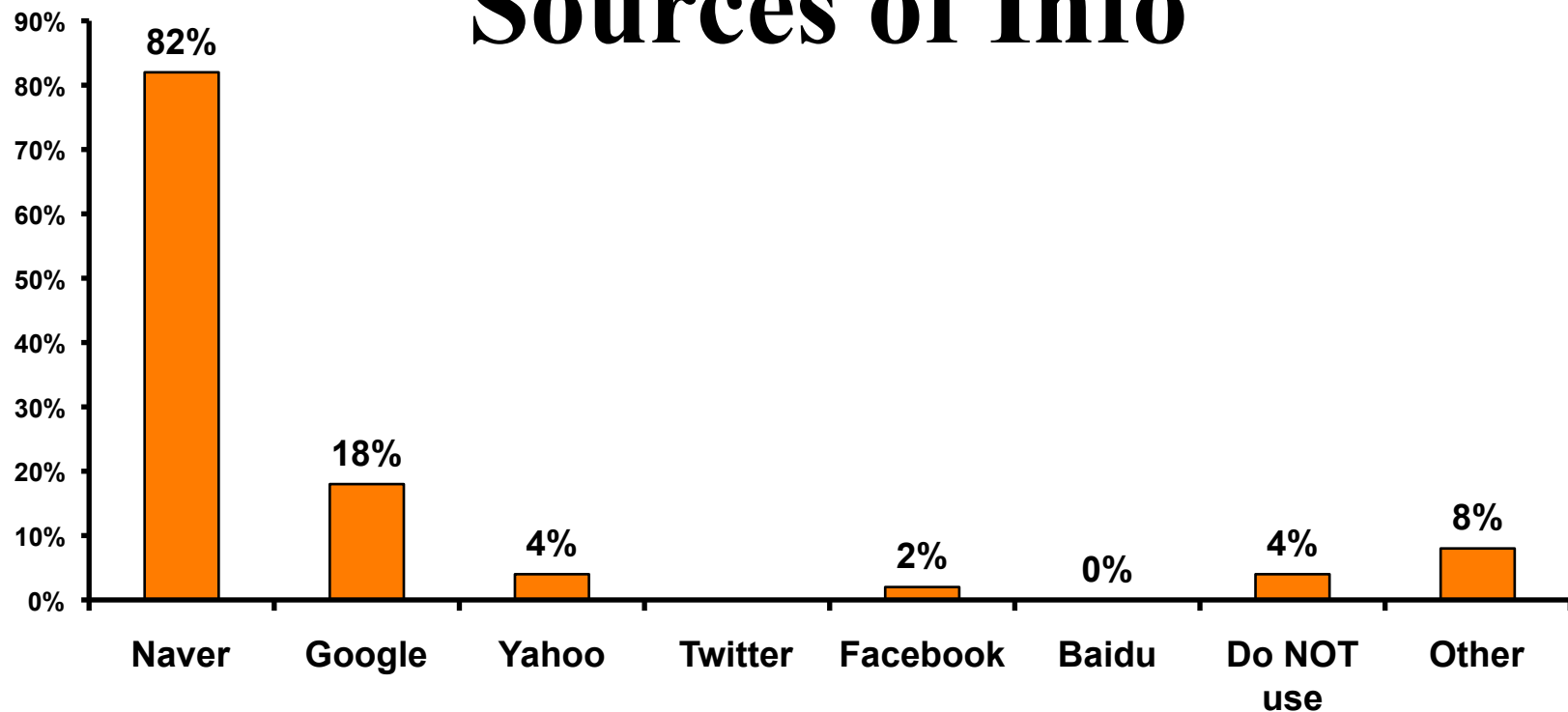
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

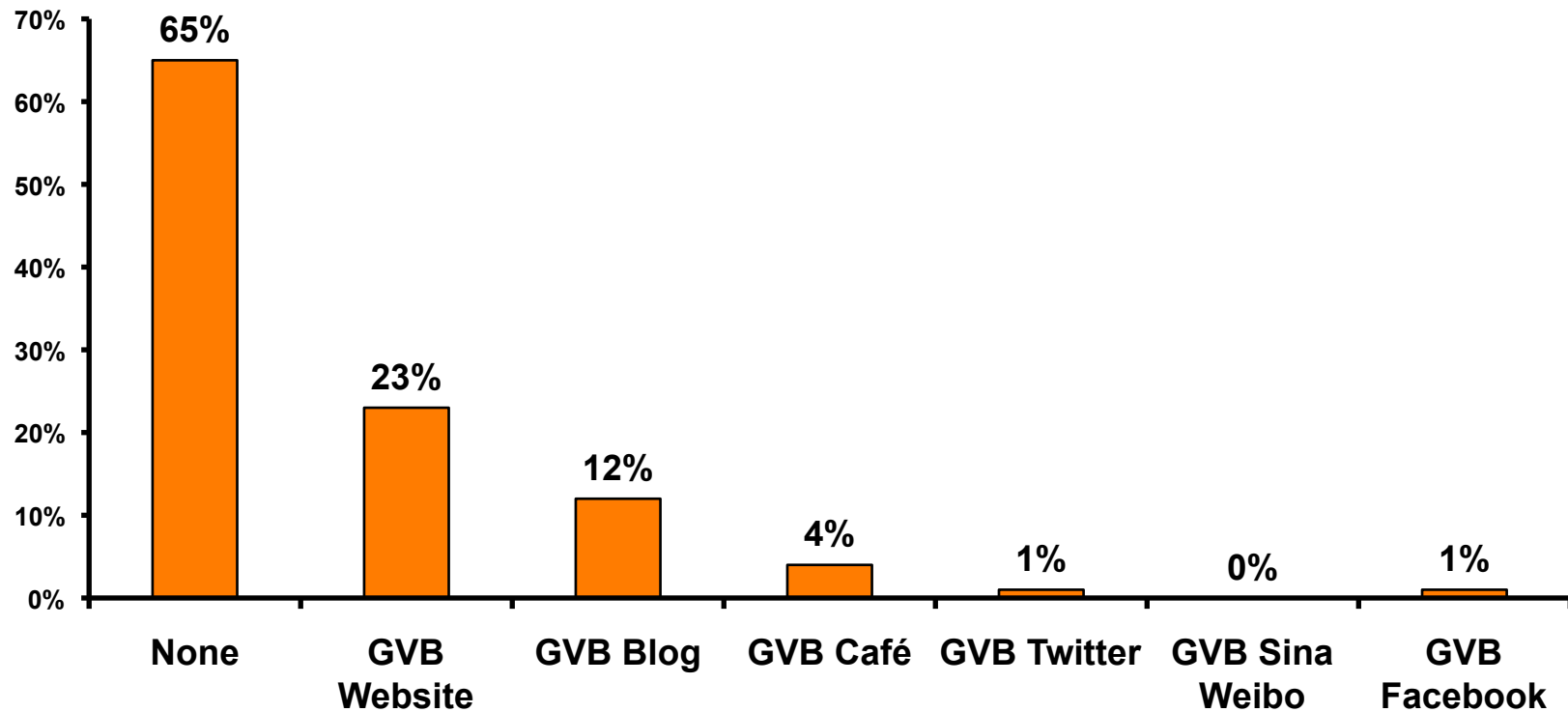


Internet- Things To Do

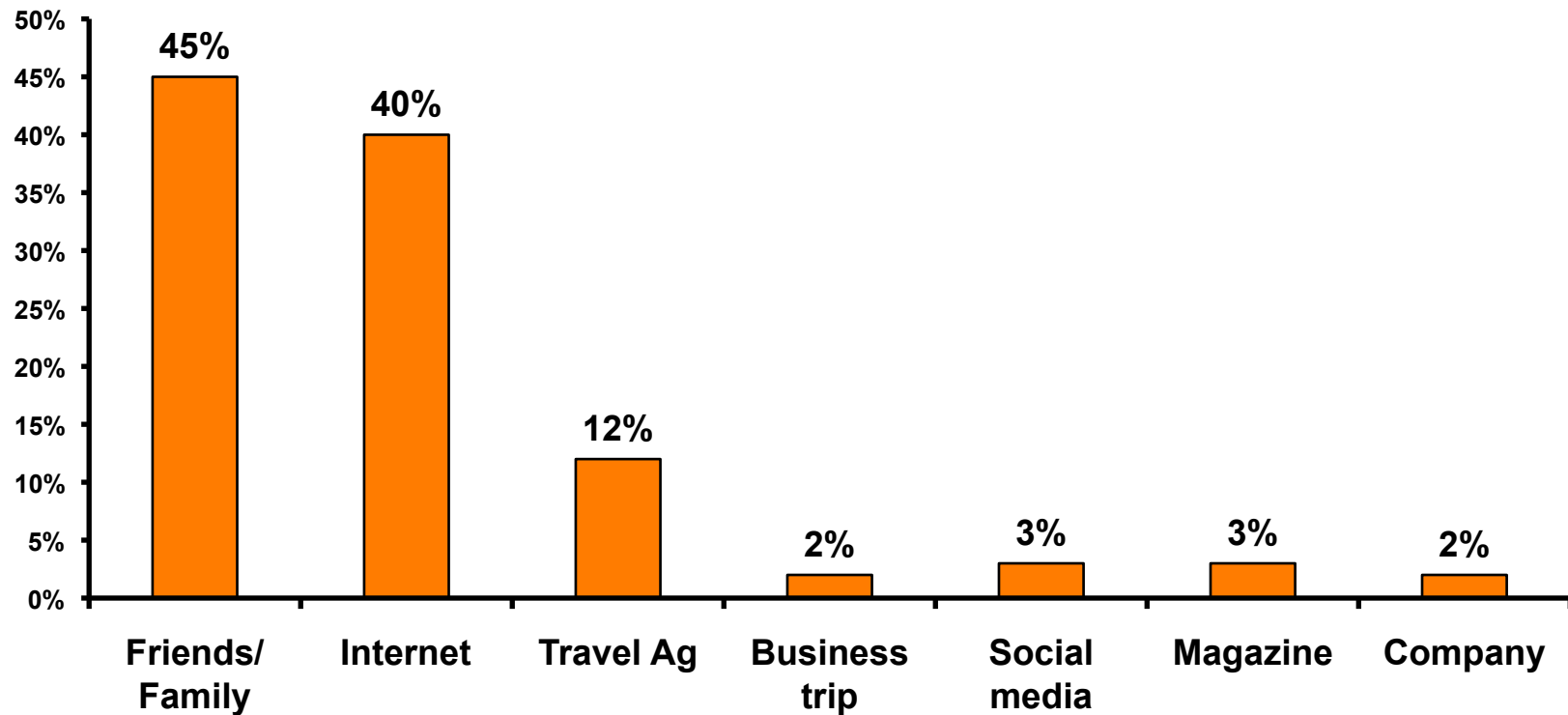
Sources of Info



Internet- GVB Sources

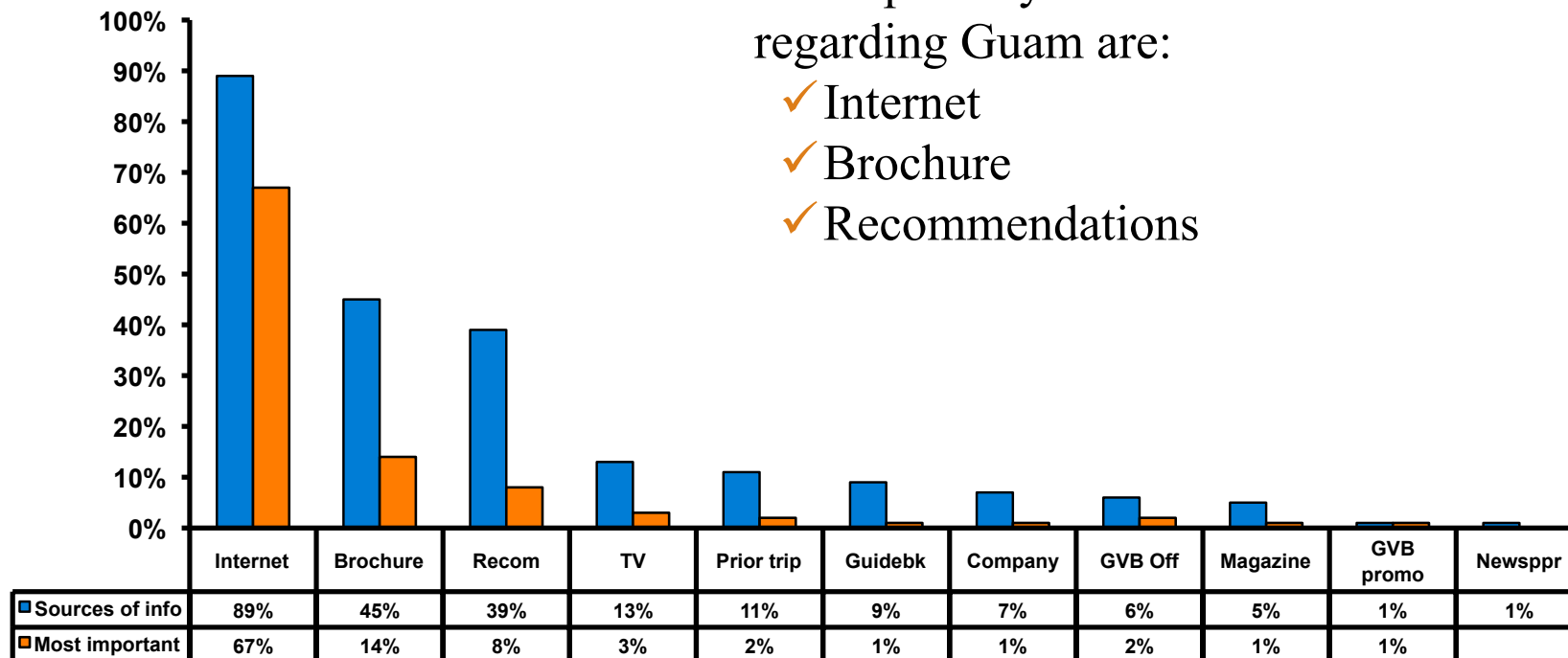


Travel Motivation- Info Sources



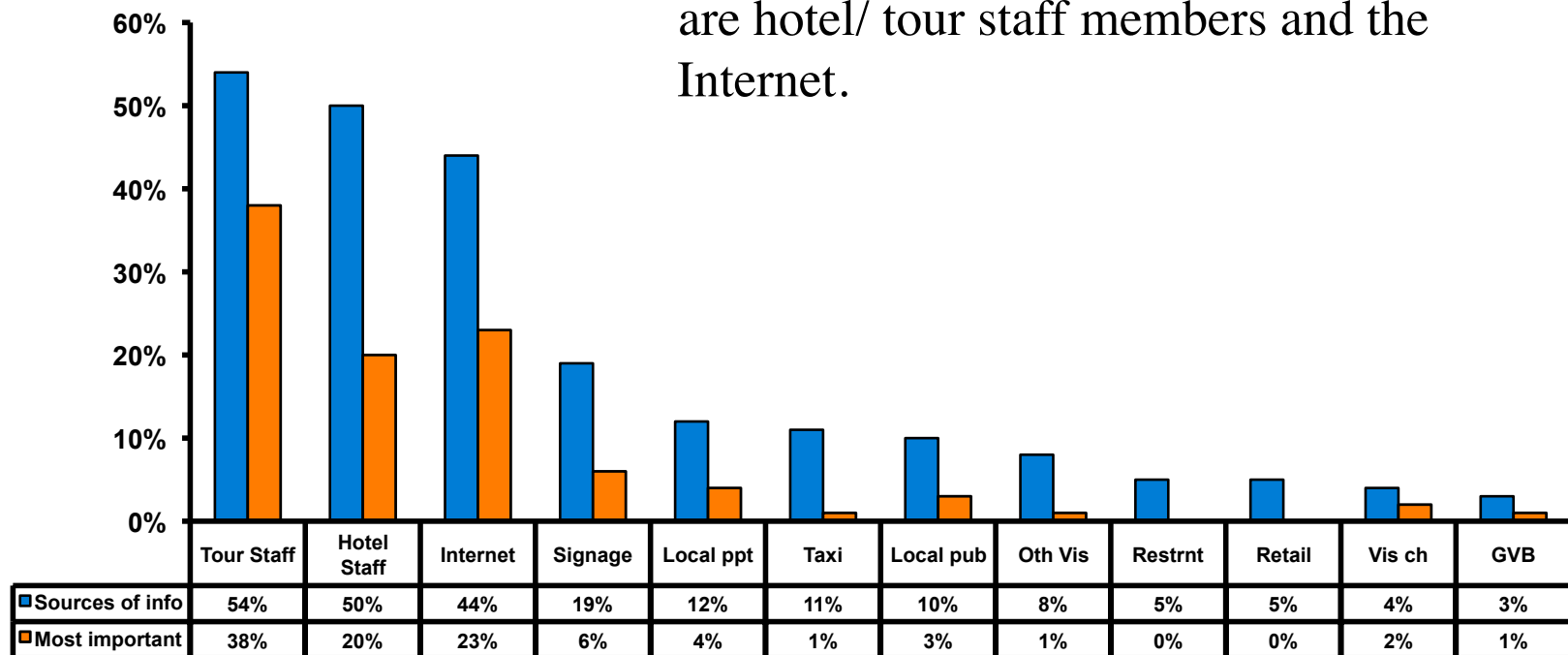
Sources of Information Pre-arrival

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



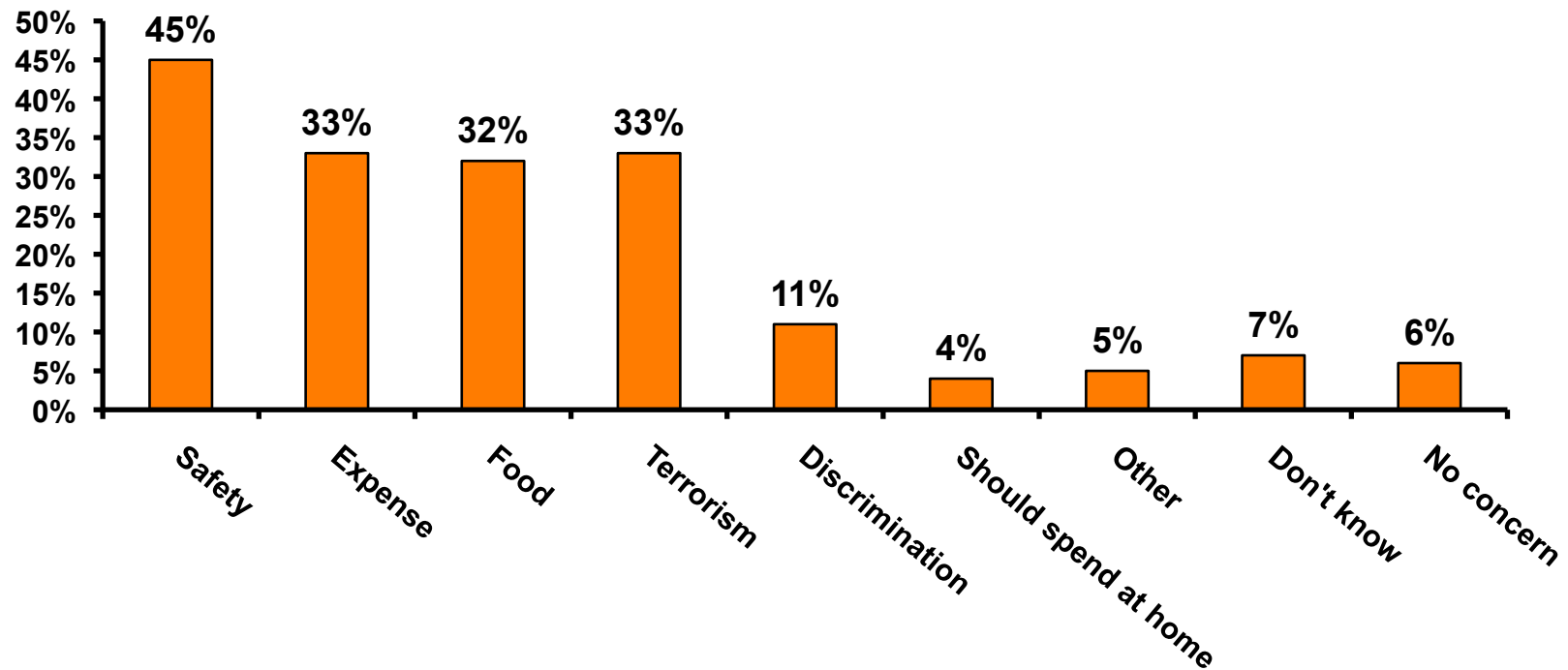
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

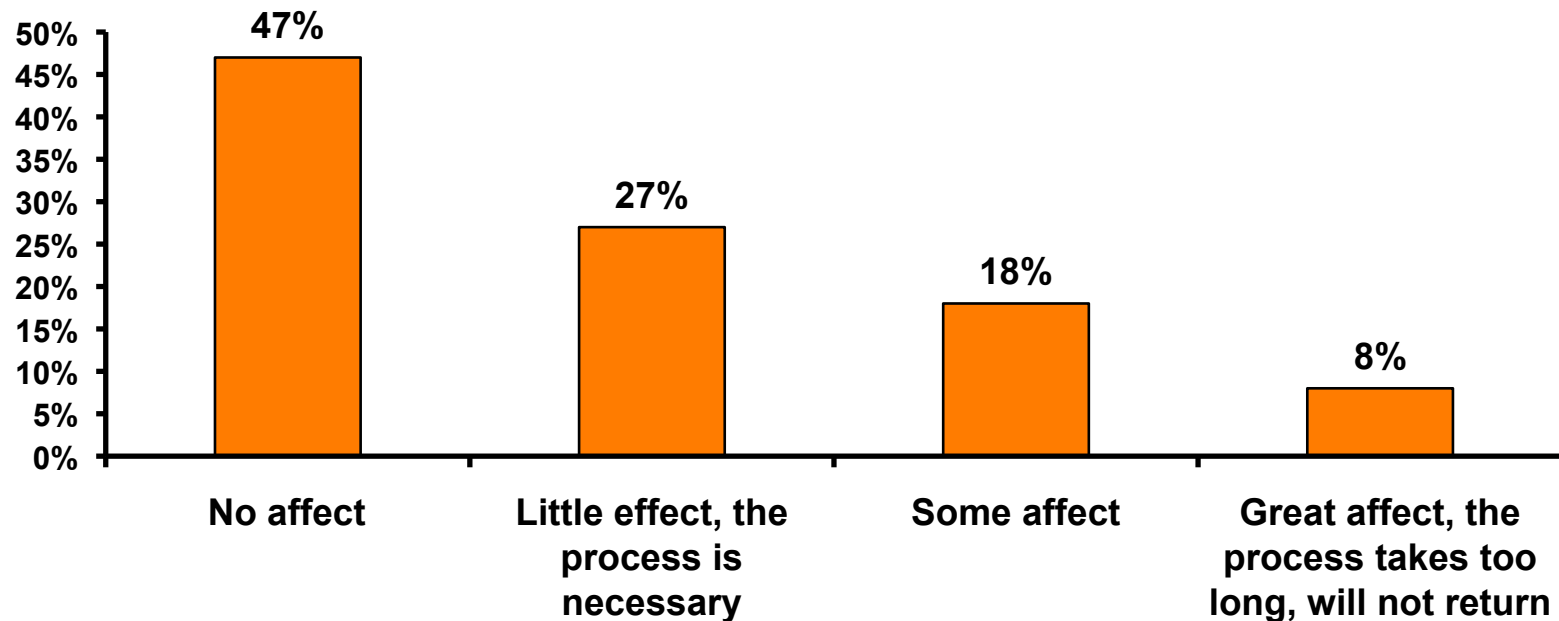
Concerns about travel outside of Korea - Overall



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	45%	27%	44%	47%	42%	12%	54%	49%	56%	41%	41%	50%	38%
	Expense	33%	55%	31%	31%	42%	16%	20%	37%	37%	49%	31%	32%	38%
	Terrorism	33%	45%	34%	29%	42%	60%	23%	30%	33%	24%	31%	38%	50%
	Food	32%	45%	34%	29%	42%		26%	37%	40%	41%	38%	34%	25%
	Discrimination against Koreans	11%	9%	10%	12%	17%	4%		8%	13%	14%	16%	16%	25%
	Don't know	7%	18%	5%	9%	17%	4%		8%		5%	9%	5%	13%
	No concerns	6%		5%	7%	8%		6%	2%	8%	3%	6%	11%	13%
	Other	5%		2%	8%	8%	8%		5%	4%	8%	3%	7%	
	Should spend at home	4%	9%	5%	2%	8%		3%	5%	10%	11%		1%	
	Total Count	350	11	185	139	12	25	35	63	52	37	32	76	8

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

