



# GUAM VISITORS BUREAU

## Korean Visitor Tracker Exit Profile

### FY2013

### JULY 2013



**Prepared by: QMark Research**

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# Background & Methodology

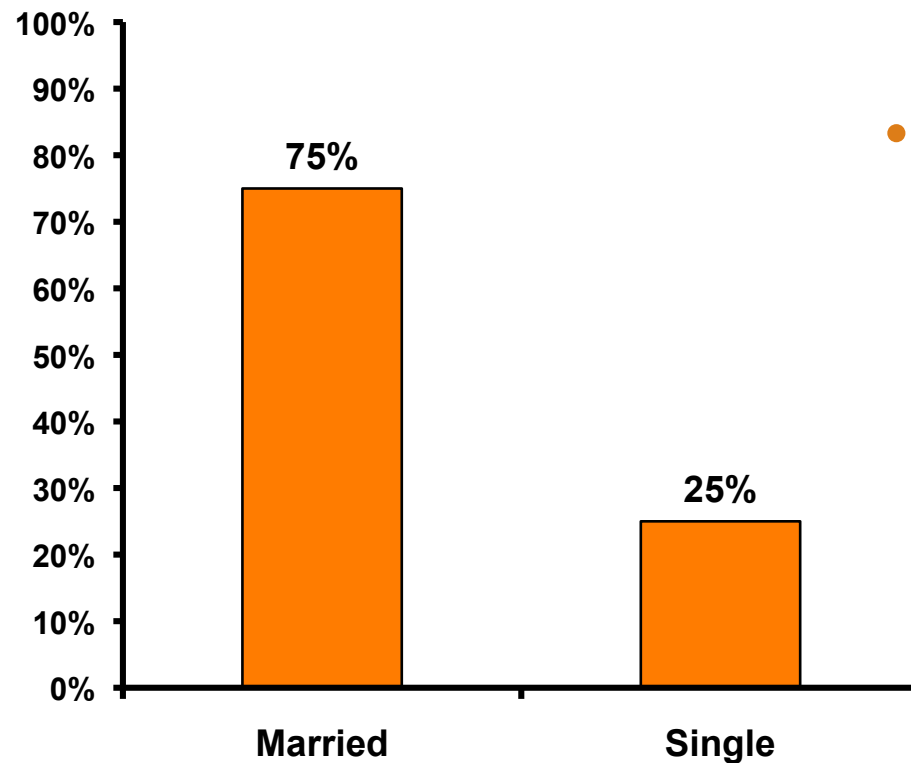
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing 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 **351** 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.

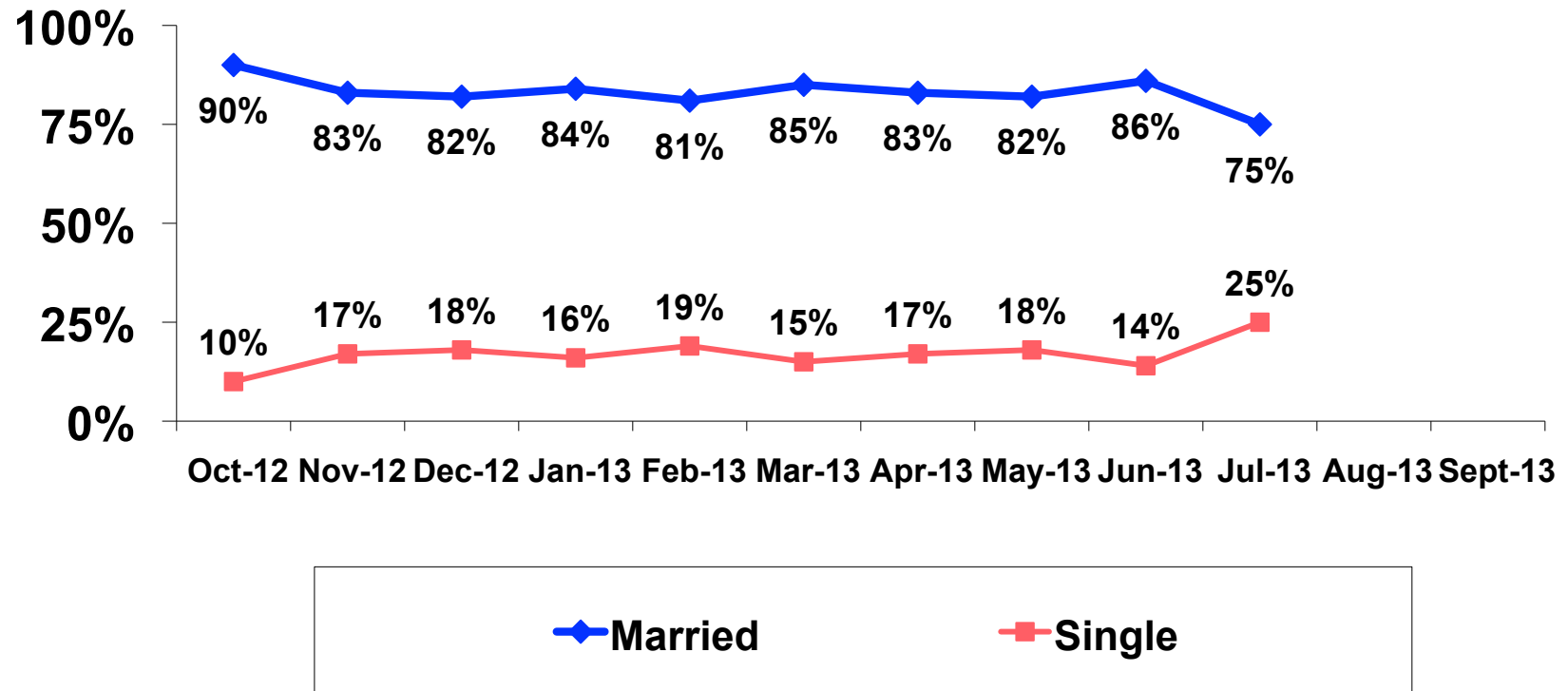
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

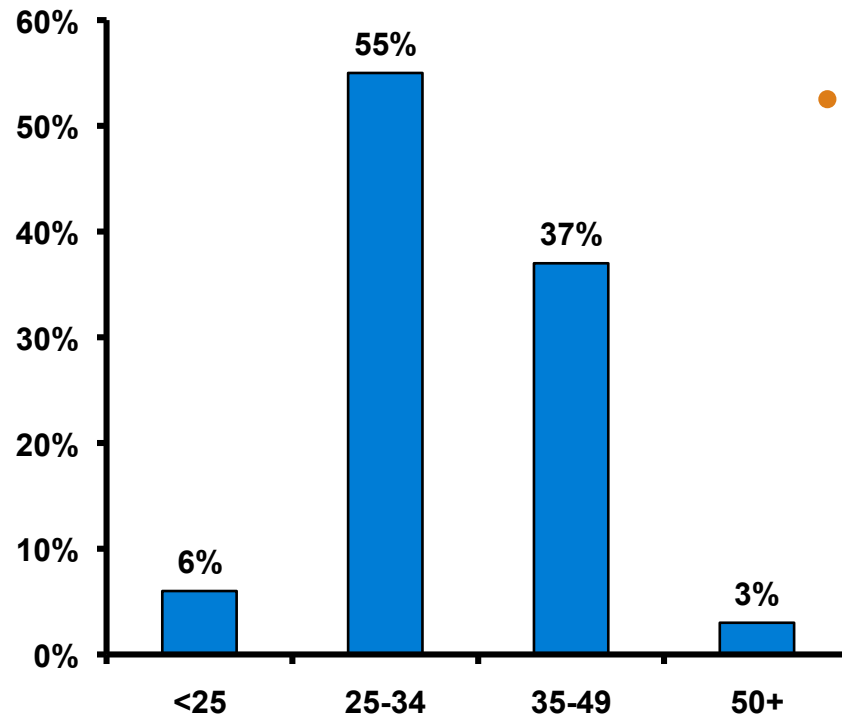


- Majority of Korean visitors are married.

# Marital Status

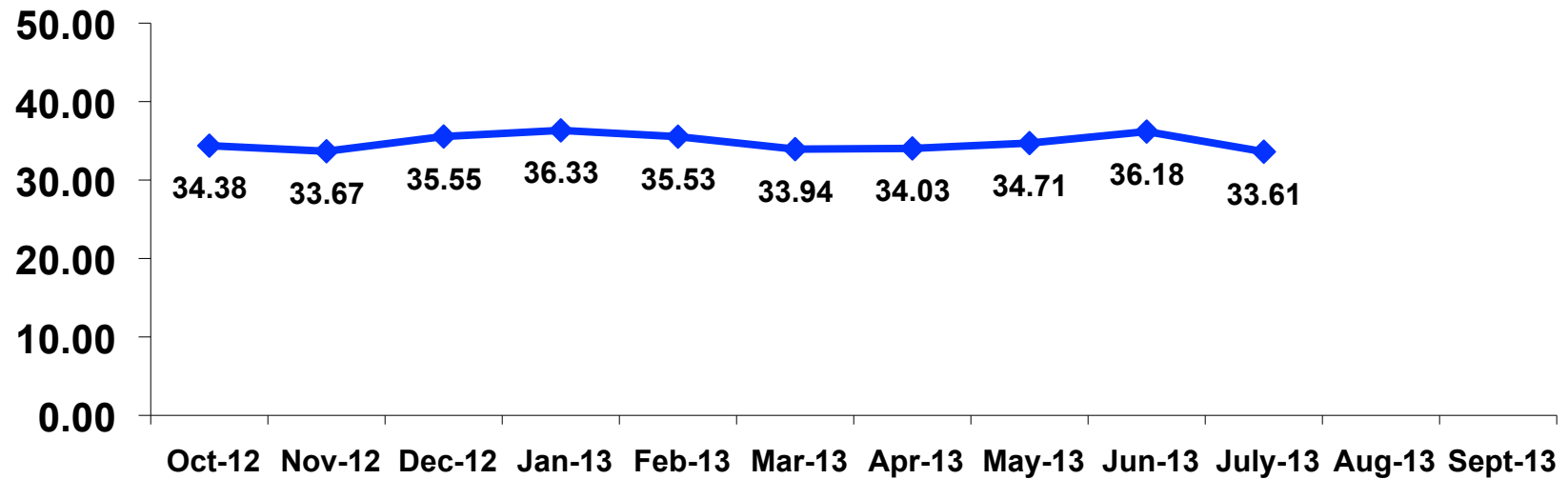


# Age - Overall



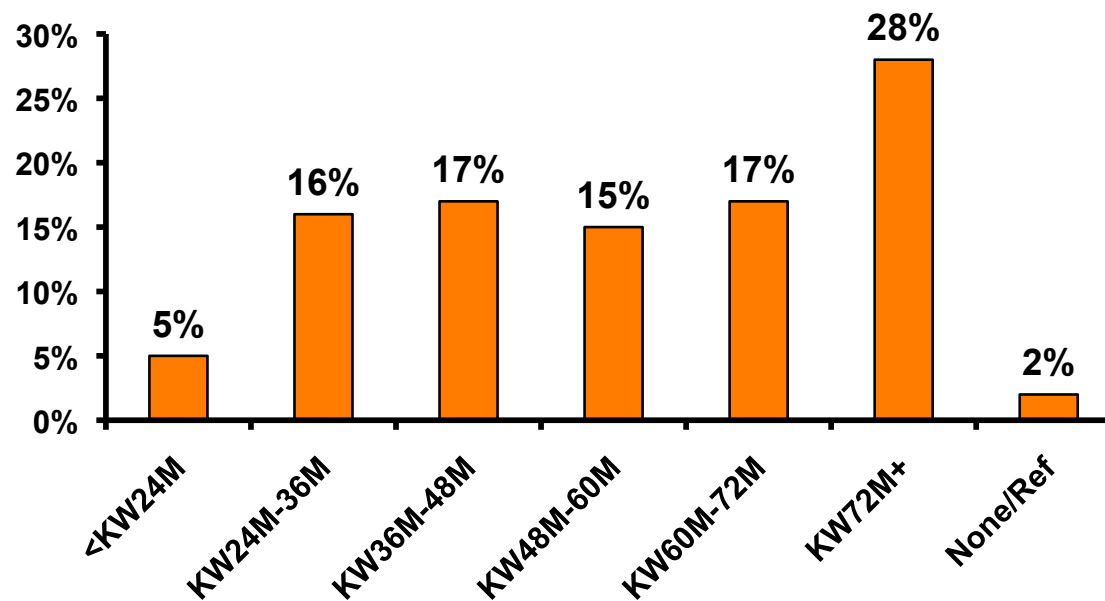
- The average age of the respondents is 33.61 years of age.

# Average Age



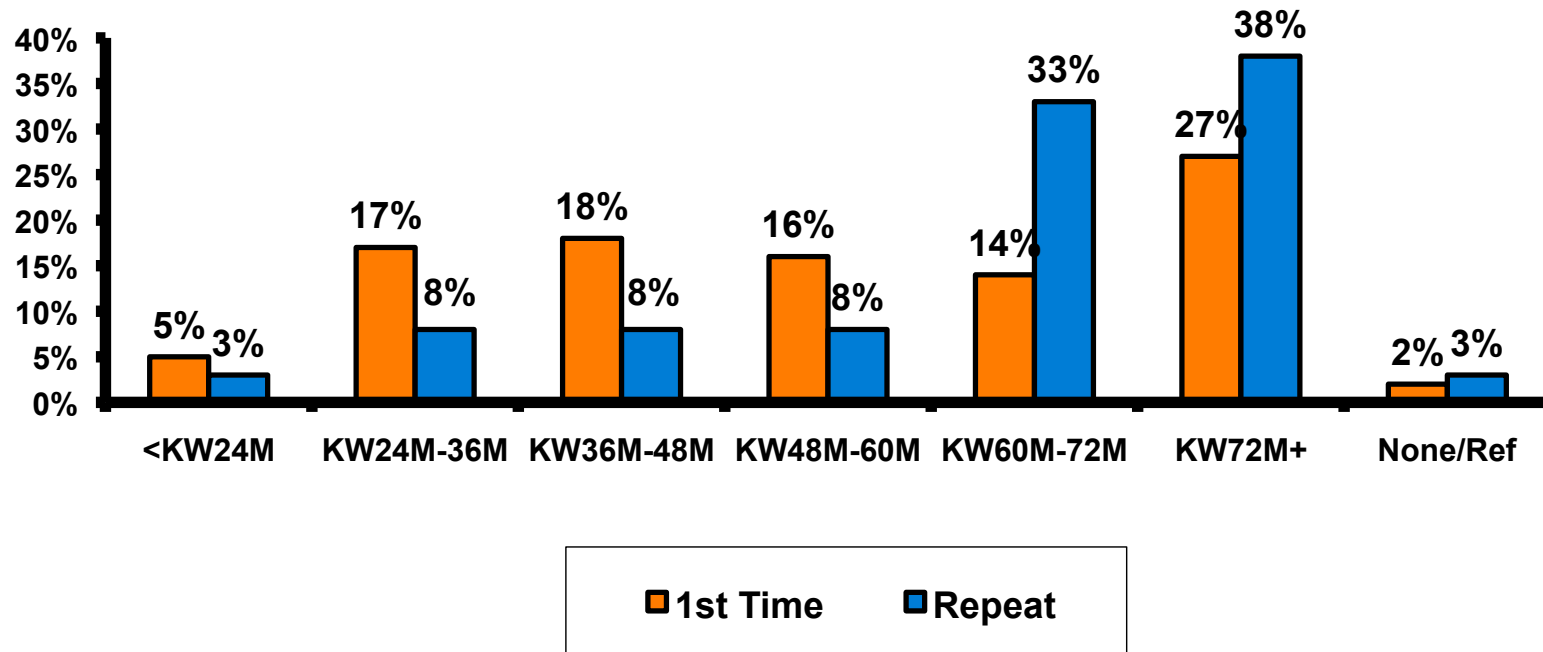


# Personal Income



• KW1113.97=\$1

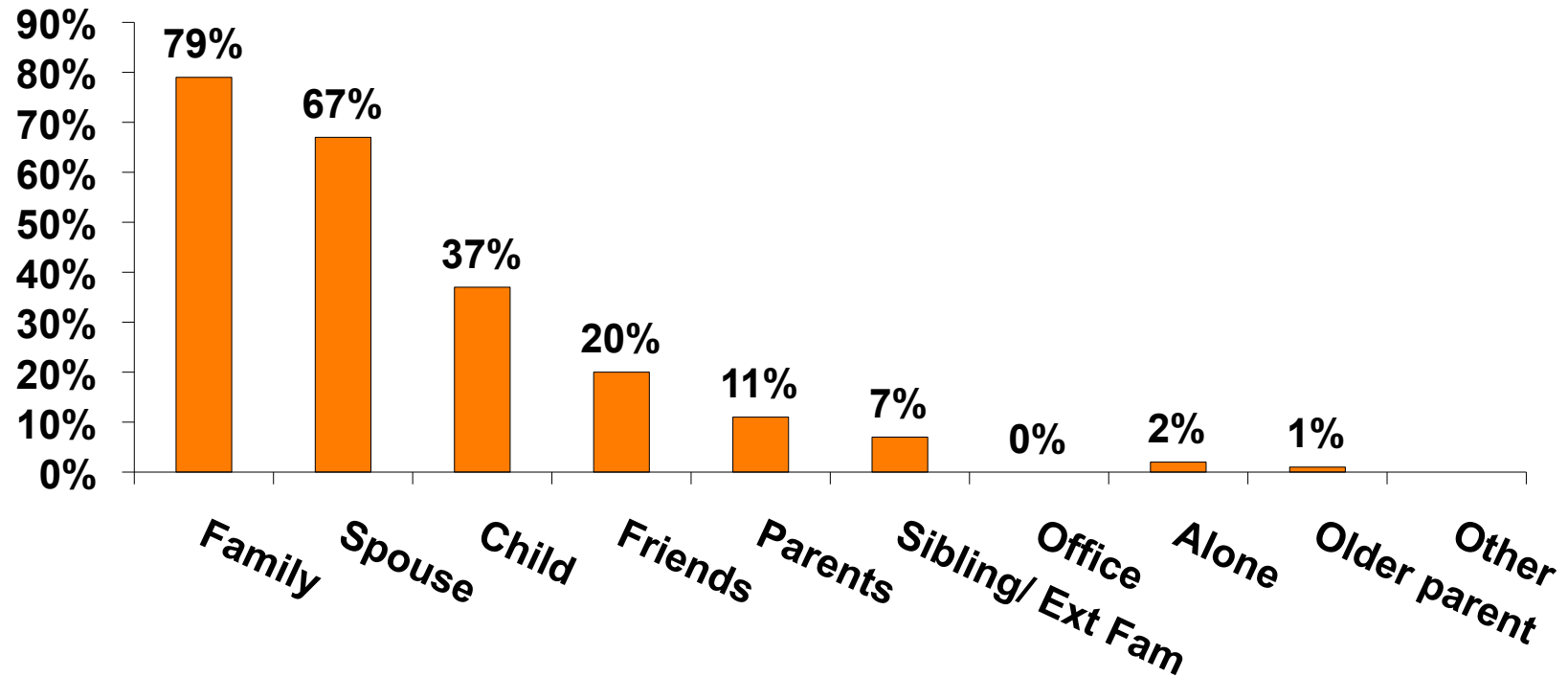
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	6	1	5	1	3		2
		Column N %	2%	1%	3%	6%	2%		22%
	KW12.0M-KW24.0M	Count	11	3	8	3	6	2	
		Column N %	3%	2%	5%	17%	3%	2%	
	KW24.0M-KW36.0M	Count	54	23	31	4	43	6	
		Column N %	16%	13%	19%	22%	24%	5%	
	KW36.0M-KW48.0M	Count	56	32	24		41	13	1
		Column N %	17%	19%	15%		23%	11%	11%
	KW48.0M-KW60.0M	Count	51	28	23		29	18	2
		Column N %	15%	16%	14%		16%	15%	22%
	KW60.0M-KW72.0M	Count	55	29	26	2	24	26	2
		Column N %	17%	17%	16%	11%	13%	21%	22%
	KW72.0M+	Count	93	53	40	4	30	56	2
		Column N %	28%	31%	25%	22%	17%	46%	22%
	No Income	Count	7	2	5	4	2	1	
		Column N %	2%	1%	3%	22%	1%	1%	
	Total	Count	333	171	162	18	178	122	9

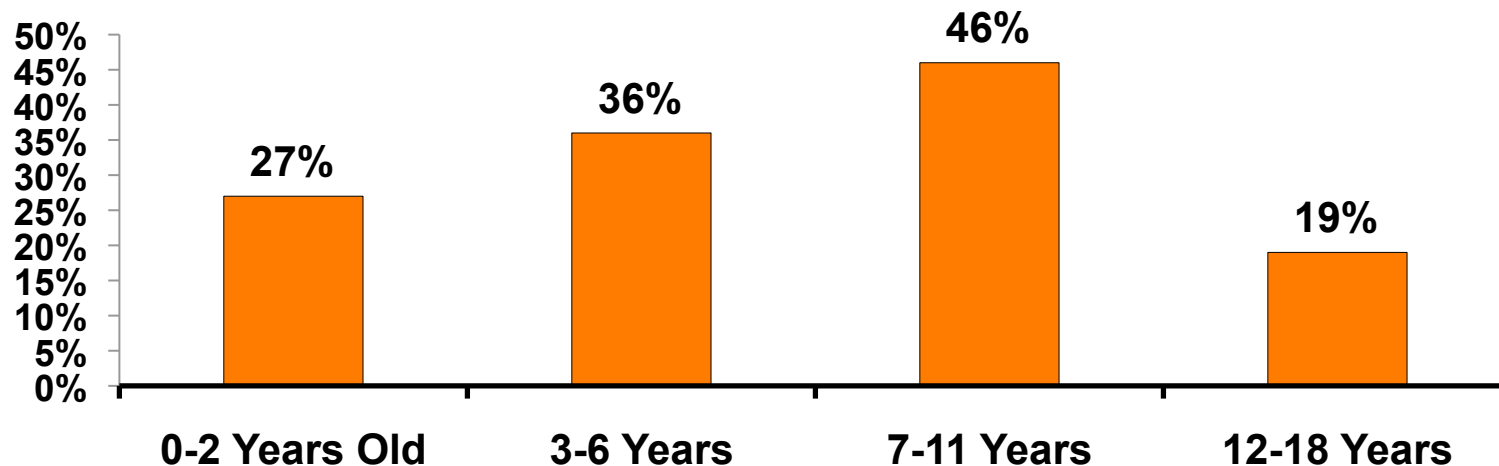
# Travel Companions



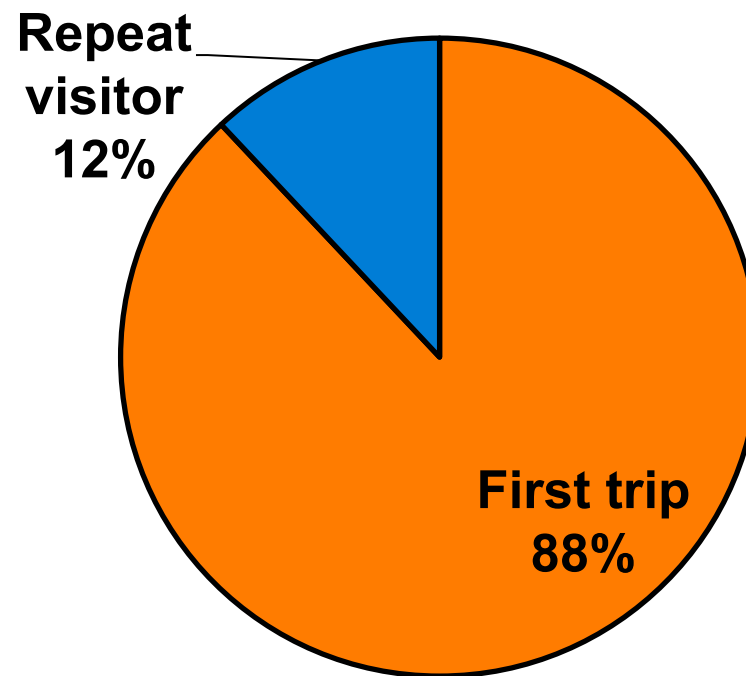
# Number of Children Travel Party

N=129 total respondents traveling with children.

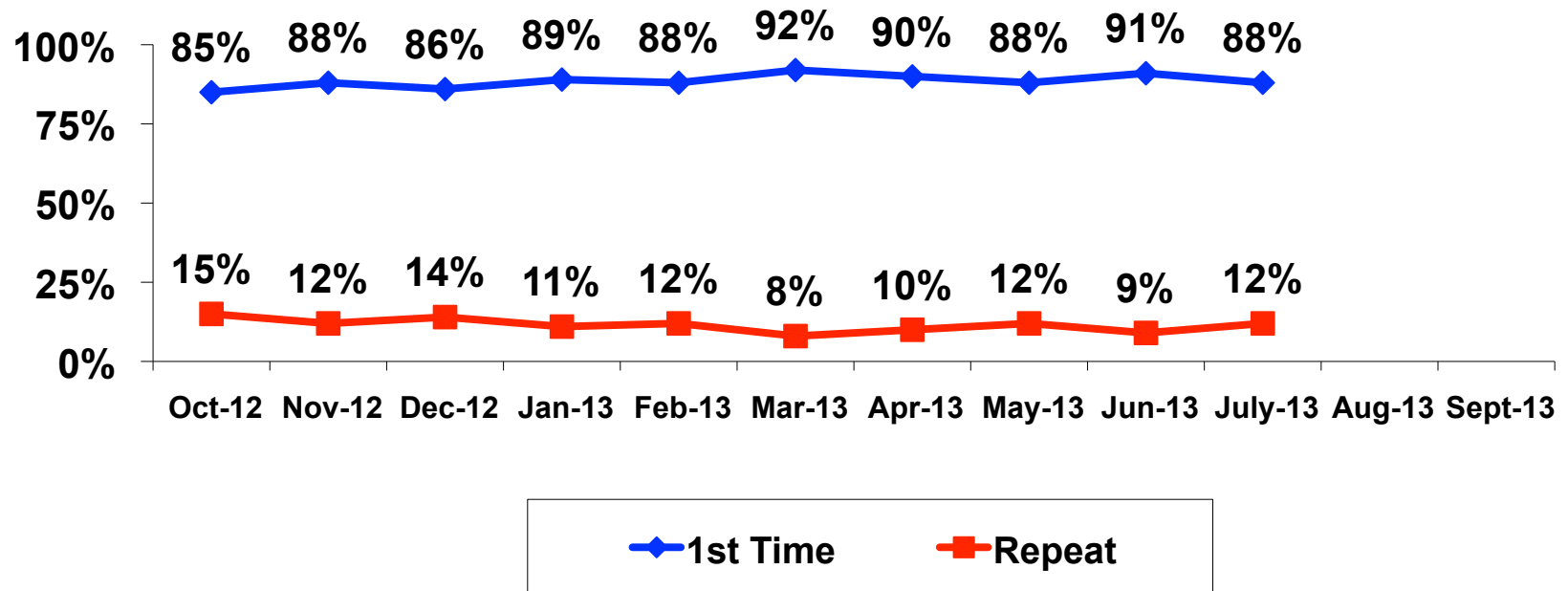
(Of those N=129 respondents, there is a total of 198 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

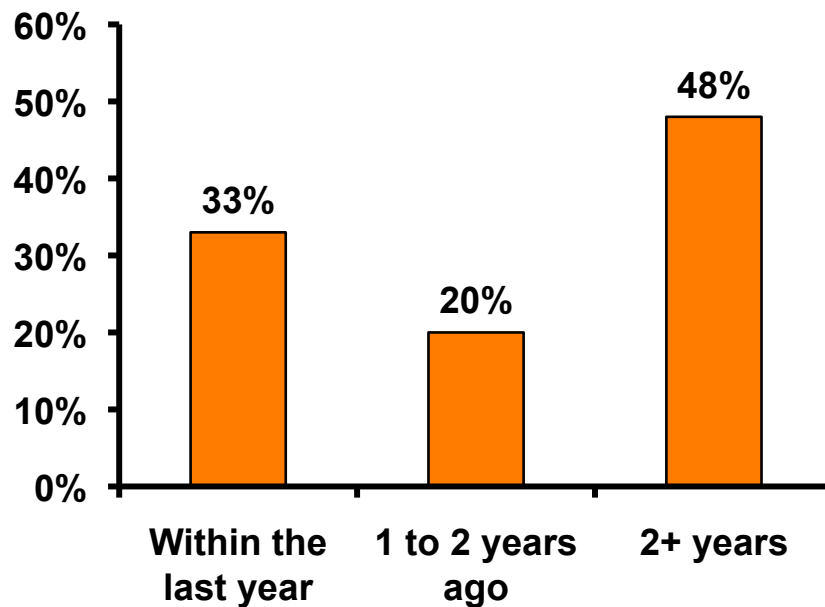
			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	176	158	18	
		Column N %	50%	51%	44%	
	Female	Count	175	151	23	
		Column N %	50%	49%	56%	
	Total		Count	351	309	41
			Column N %			
AGE	18-24	Count	21	19	2	
		Column N %	6%	6%	5%	
	25-34	Count	189	174	15	
		Column N %	55%	57%	37%	
	35-49	Count	126	103	23	
		Column N %	37%	34%	56%	
	50+	Count	9	8	1	
		Column N %	3%	3%	2%	
	Total		Count	345	304	41
			Column N %			

- Repeat visitors tend to be older on average



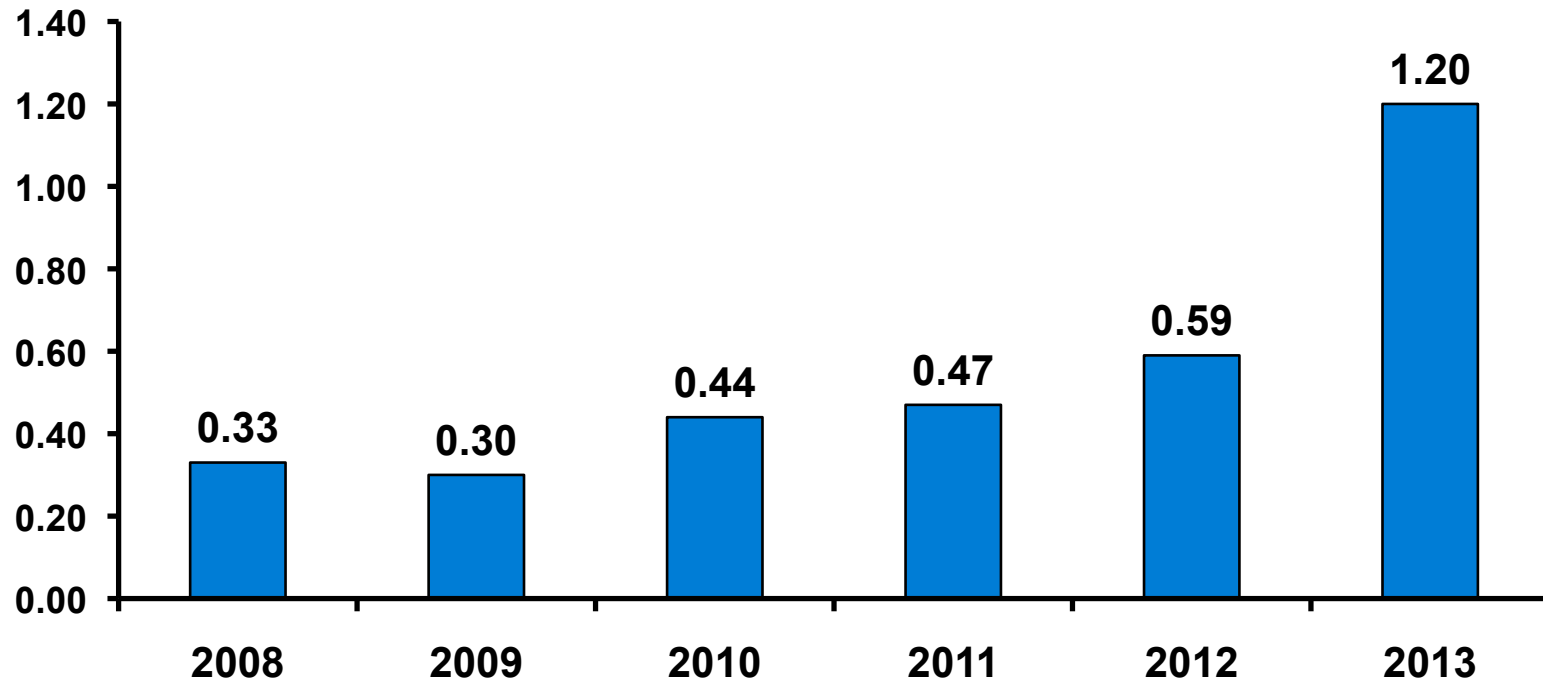
# Repeat Visitors Last Trip

n = 40



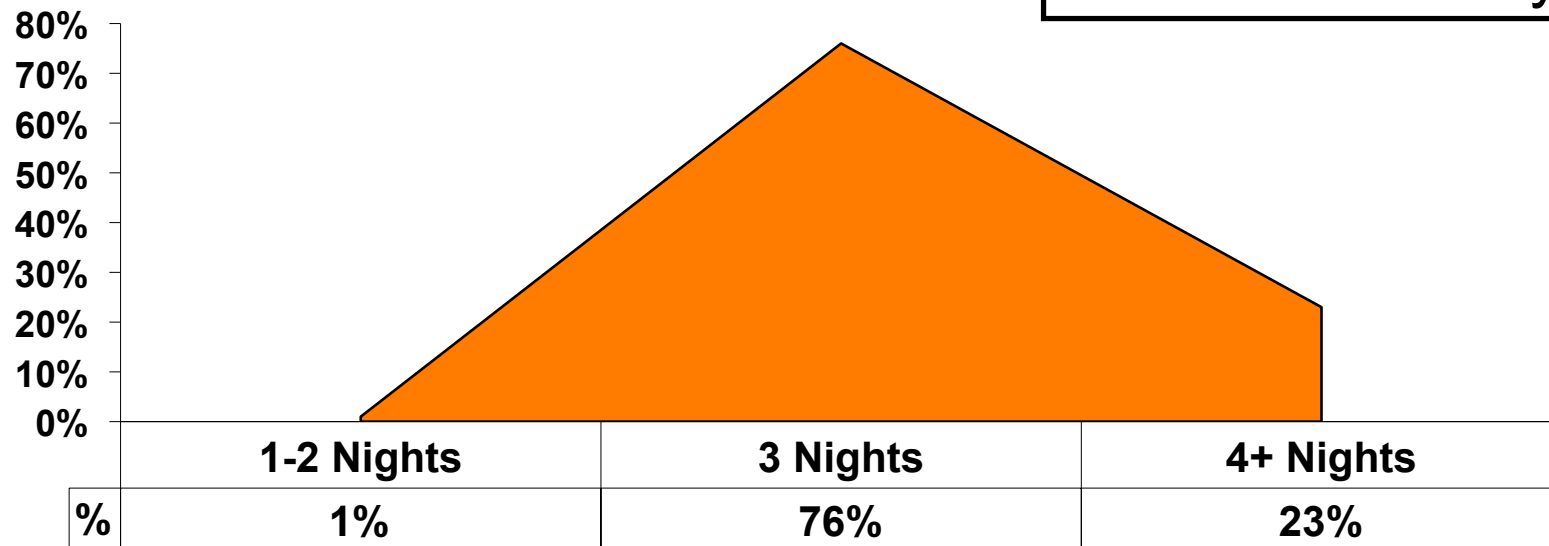
- The average repeat visitor has been to Guam 2.35 times.
- Less than half of repeat visitors have been here within the last year.

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

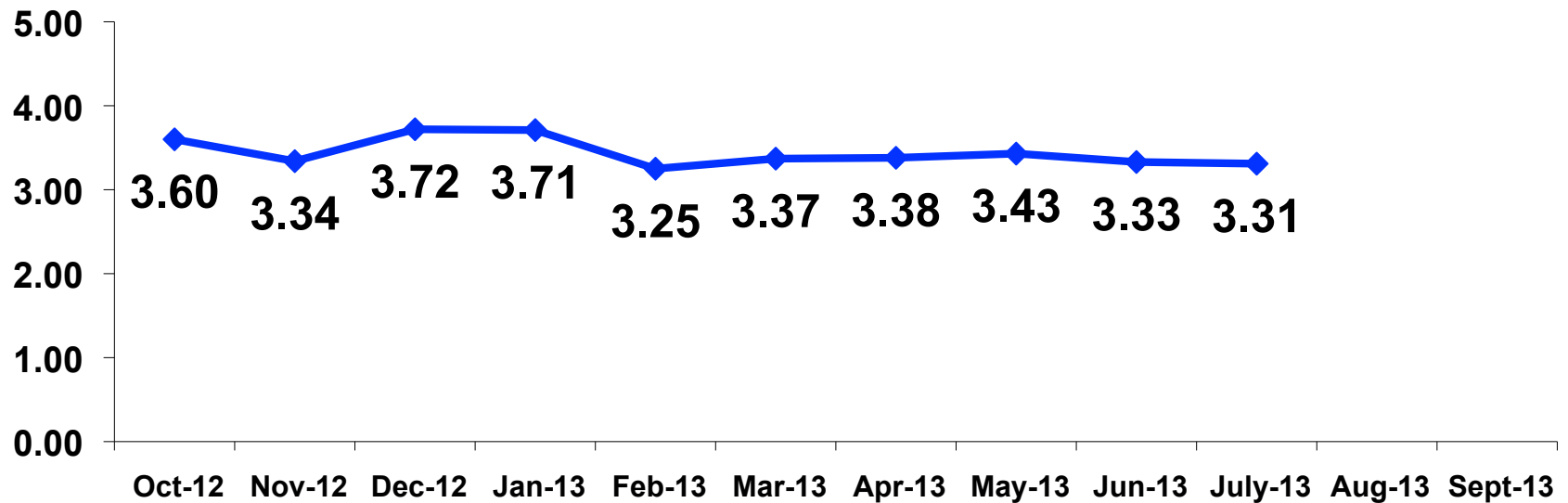


# Length of Stay

Mean = 3.31 Days  
Median = 3.0 Days



# Average Length of Stay

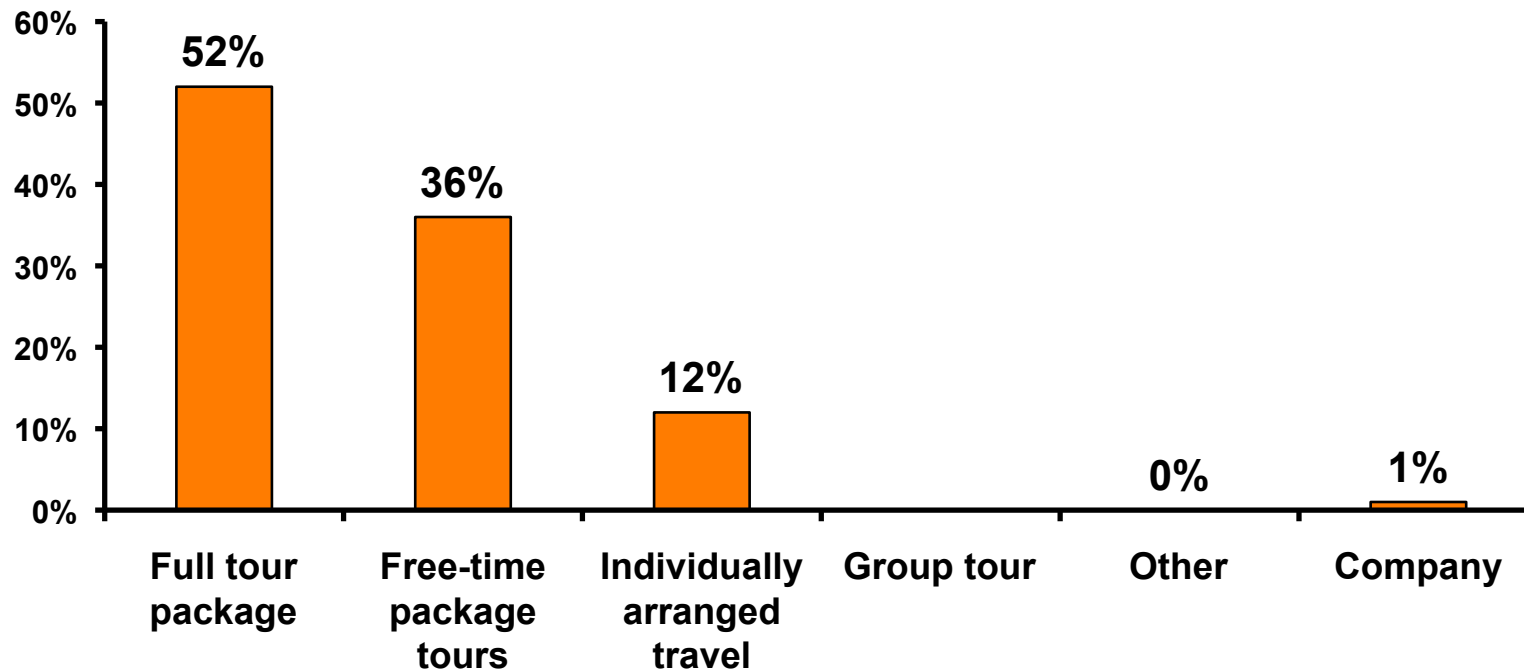


# Occupation by Income

		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+		
Q25	White Collar Office Worker	45%		36%	44%	49%	33%	41%	59%		
	Professional/ Specialist/ Tech	10%		18%	6%	13%	14%	9%	10%		
	Housewife/ Homemaker	9%	33%		4%	7%	14%	11%	8%	14%	
	Professor/ Teacher/ After-school	9%	33%	18%	13%	15%	6%	6%	3%		
	Self-employed	7%			6%		8%	20%	6%		
	Student	6%	17%	18%	4%	2%		4%	4%	86%	
	Service worker/ Private hse worker	4%			11%	4%	8%		1%		
	Manager/ Admin	3%			4%	7%	4%	2%	2%		
	Govt- office worker non-mgr	1%			4%	2%		2%	1%		
	Govt- Manager	1%			2%		6%				
	Other	1%			2%		2%		1%		
	Freelancer	1%						4%	1%		
	Skilled worker	1%	17%		2%				1%		
	Sales worker/ Clerical	1%				2%	4%				
	Govt- Executive	1%						2%	1%		
	Unemployed	0%		9%							
	Judicial	0%							1%		
	Retired	0%					2%				
	Total	Count	339	6	11	54	55	51	54	93	7

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



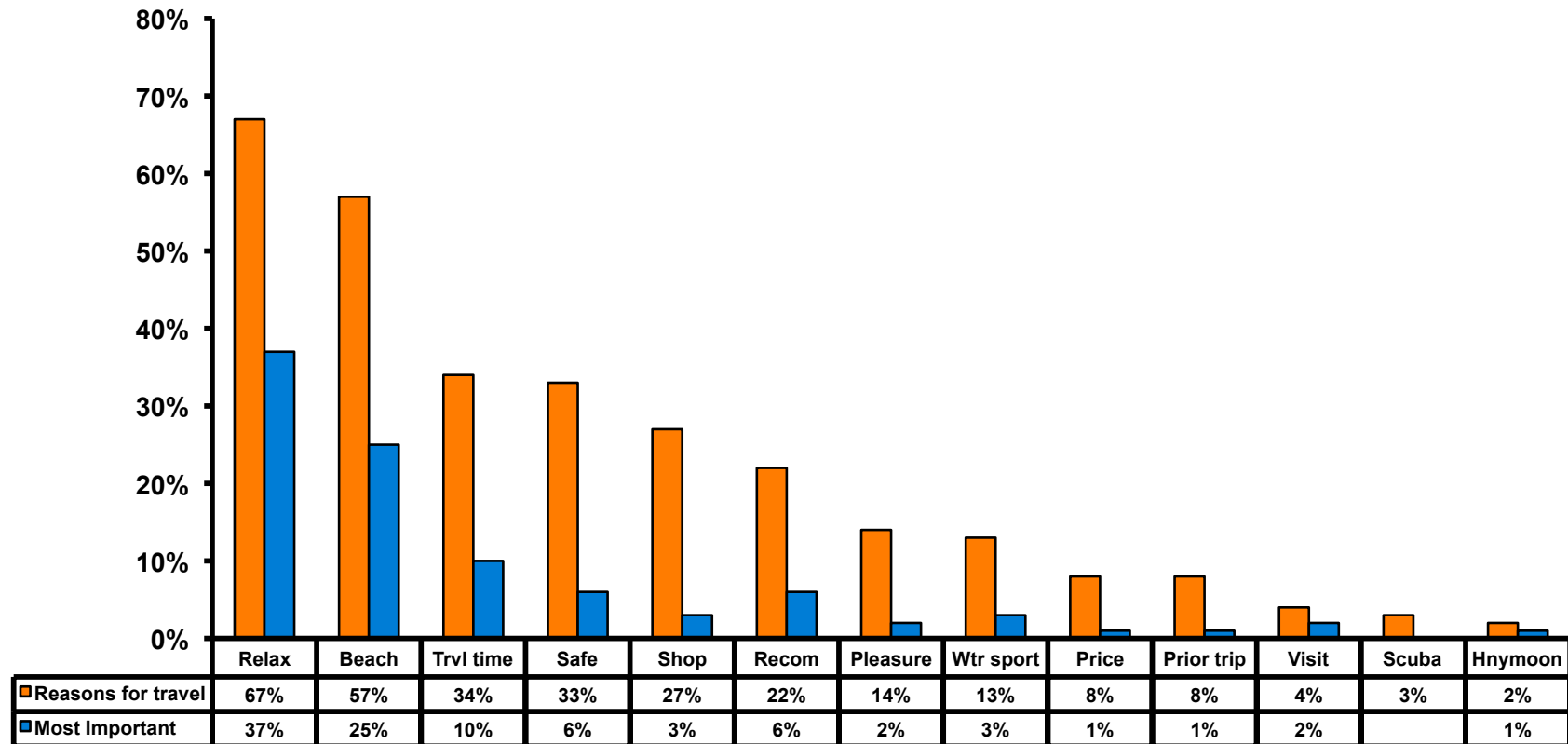
# Accommodation by Income

Average length of stay: 3.31 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	33%	40%	9%	21%	15%	40%	39%	46%	57%	
	Hyatt Regency Guam	12%			6%	11%	12%	15%	19%		
	Hotel Nikko Guam	12%	20%	9%	15%	15%	24%	13%	2%		
	Sheraton Laguna Guam	10%	20%	18%	13%	15%	4%	7%	10%		
	Outrigger Guam Resort	6%			4%	16%	6%	4%	3%		
	Holiday Resort Guam	6%	20%		8%	7%	2%	2%	8%	29%	
	Hilton Guam Resort	5%		27%	9%	4%	4%	4%	2%		
	Westin Resort Guam	4%			6%	4%		6%	5%		
	Onward Beach Resort	3%		9%	8%	4%	2%	4%	1%		
	Royal Orchid Guam	1%			2%	2%		2%			
	Guam Reef & Olive Spa	1%				5%		2%		14%	
	Guam Aurora Resort	1%			2%	2%			2%		
	Guam Marriott Resort	1%		9%	2%	2%			1%		
	Home stay/ friend/ relative	1%		9%	2%			2%			
	Bayview Hotel	1%			2%		4%				
	Tumon Bay Capital Hotel	1%		9%	2%						
	Ramada Suites Guam	0%						2%			
	Leo Palace Resort	0%					2%				
	Total	Count	346	5	11	53	55	50	54	93	7



# 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	67%	65%	70%	64%	67%	66%	69%	
	Natural beauty	57%	75%	58%	53%	56%	52%	62%	
	Short travel time	34%	15%	38%	31%	22%	30%	37%	
	Safe	33%	20%	34%	34%	33%	39%	27%	
	Shopping	27%	10%	33%	22%	11%	25%	30%	
	Recomm- friend/family/trvl agnt	22%	15%	23%	22%	22%	22%	23%	
	Pleasure	14%	25%	18%	6%		13%	14%	
	Water sports	13%	20%	14%	11%		13%	14%	
	Price	8%	5%	10%	6%	11%	7%	9%	
	Previous trip	8%	5%	6%	13%		6%	10%	
	Visit friends/ Relatives	4%	10%	5%	2%		4%	3%	
	Scuba	3%	15%	3%	2%	11%	2%	5%	
	Honeymoon	2%	5%	4%			2%	2%	
	Other	2%		2%	2%		1%	2%	
	Organized sports	2%		1%	2%	11%	1%	2%	
	Company/ Business Trip	1%		2%	1%		1%	1%	
	Career Cert/ Testing	1%		1%	1%		2%		
	Golf	1%			2%			1%	
	Married/ Attn wedding	0%			1%		1%		
	Company Sponsored	0%			1%		1%		
	Total	Count	347	20	187	126	9	174	173

# 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	67%	67%	73%	67%	69%	72%	55%	73%	86%	
	Natural beauty	57%	67%	73%	54%	51%	54%	51%	65%	100%	
	Short travel time	34%		27%	20%	36%	42%	31%	42%	43%	
	Safe	33%	17%	27%	33%	35%	26%	33%	38%	29%	
	Shopping	27%	17%	27%	31%	29%	30%	27%	26%	29%	
	Recomm- friend/family/trvl agnt	22%	17%		26%	18%	32%	18%	22%	29%	
	Pleasure	14%	17%	27%	15%	13%	10%	13%	11%	71%	
	Water sports	13%	17%	18%	15%	7%	14%	16%	11%	43%	
	Price	8%	17%	9%	11%	11%	6%	5%	8%	14%	
	Previous trip	8%			6%	5%	4%	15%	11%	14%	
	Visit friends/ Relatives	4%		9%	7%	2%	2%	4%	2%		
	Scuba	3%		18%	4%	2%	4%	2%	3%	14%	
	Honeymoon	2%			4%	4%	2%	4%			
	Other	2%				4%		2%	3%		
	Organized sports	2%	17%		2%			2%	2%	14%	
	Company/ Business Trip	1%			2%		4%		1%		
	Career Cert/ Testing	1%		9%	2%				1%		
	Golf	1%						2%	1%		
	Married/ Attn wedding	0%							1%		
	Company Sponsored	0%				2%					
	Total	Count	347	6	11	54	55	50	55	91	7

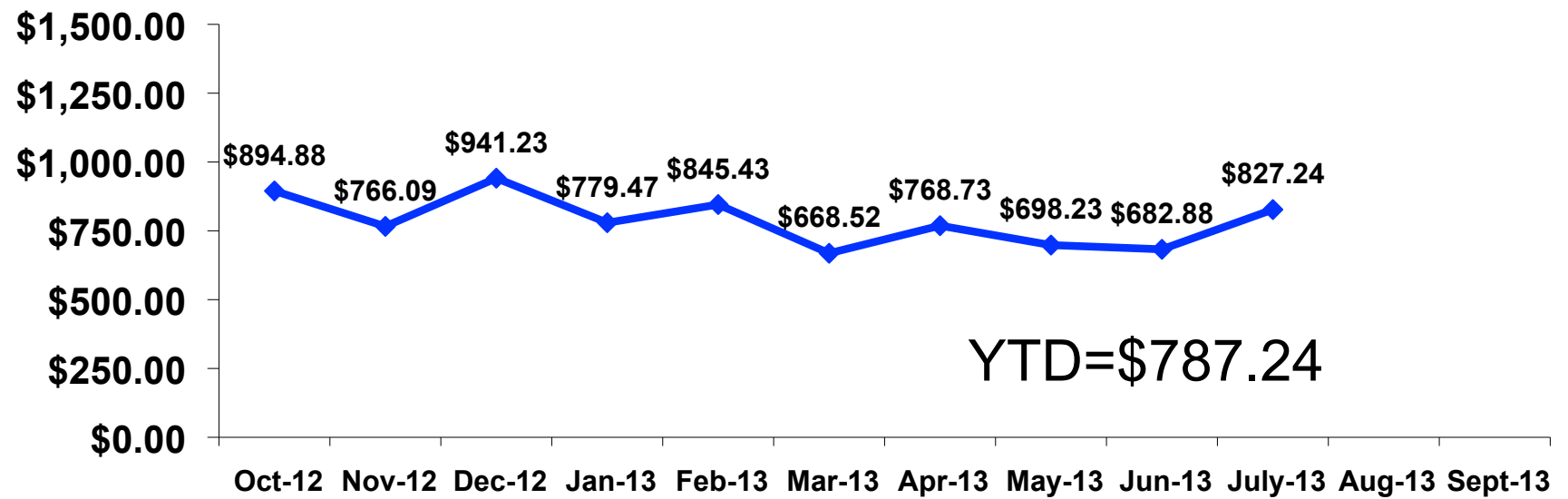
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

**KW 1,113.97/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)
- \$10,323 = maximum (highest amount recorded for the entire sample)
- \$827.24 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

## KW 1,113.97=\$1

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

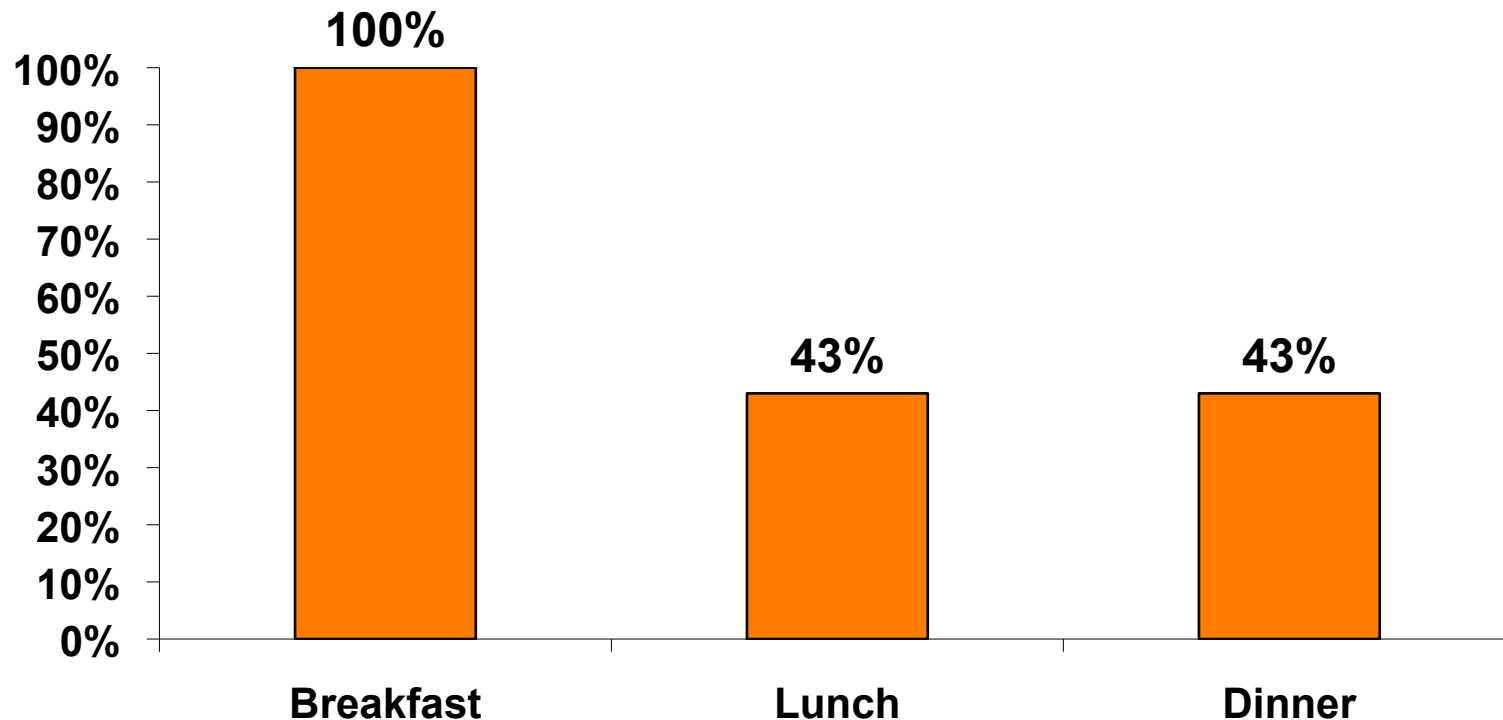
	MEAN \$
Air & Accommodation package only	\$2,894.50
Air & Accommodation w/ daily meal package	\$2,514.80
Air only	\$1,481.38
Accommodation only	\$968.84
Accommodation w/ daily meal only	\$947.96
Food & Beverages in Hotel	\$-
Ground transportation - Korea	\$59.57
Ground transportation - Guam	\$85.74
Optional tours/ activities	\$306.52
Other expenses	\$143.27
<b>Total Prepaid</b>	<b>\$2,133.34</b>



# Prepaid Meal Breakdown

## Air/ Accommodations with Daily Meal Package

n=7

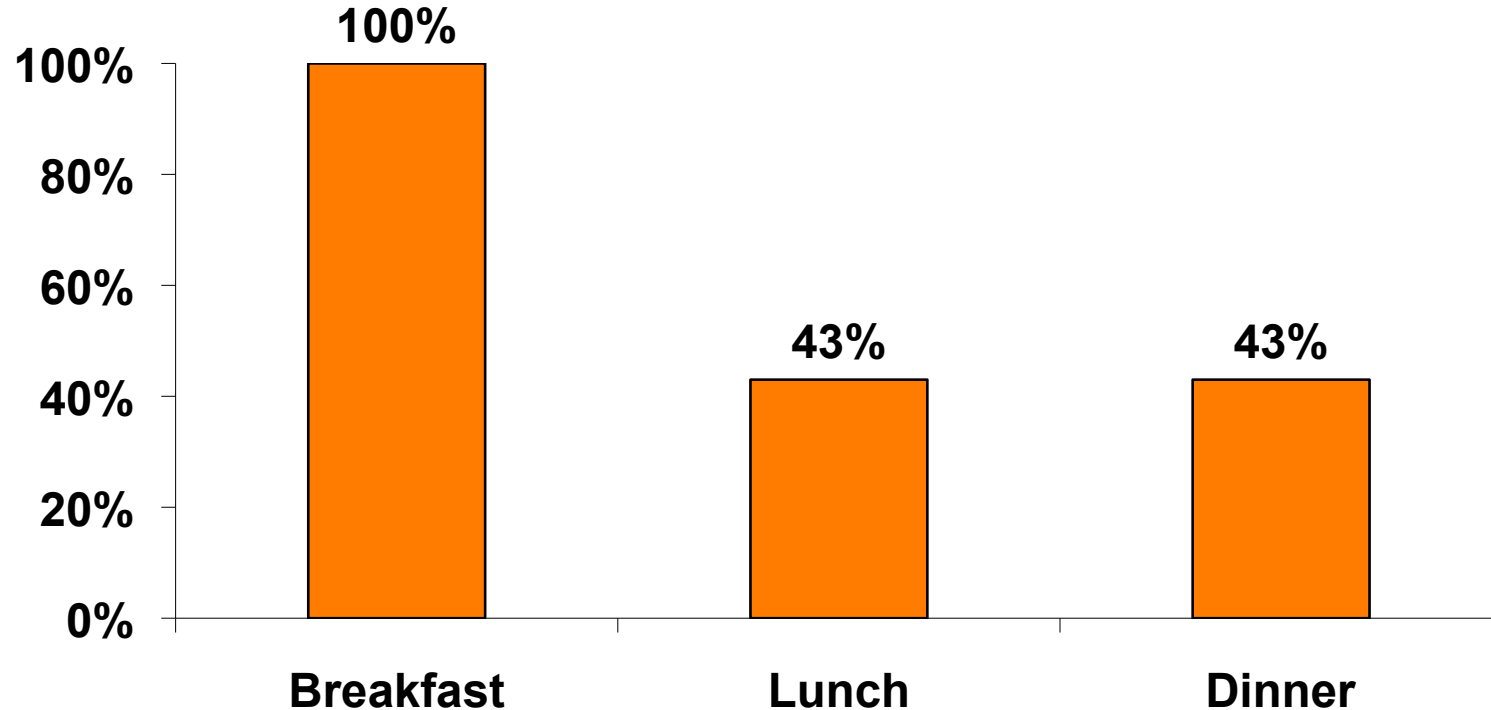


Mean=\$2,514.80 per travel party

# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

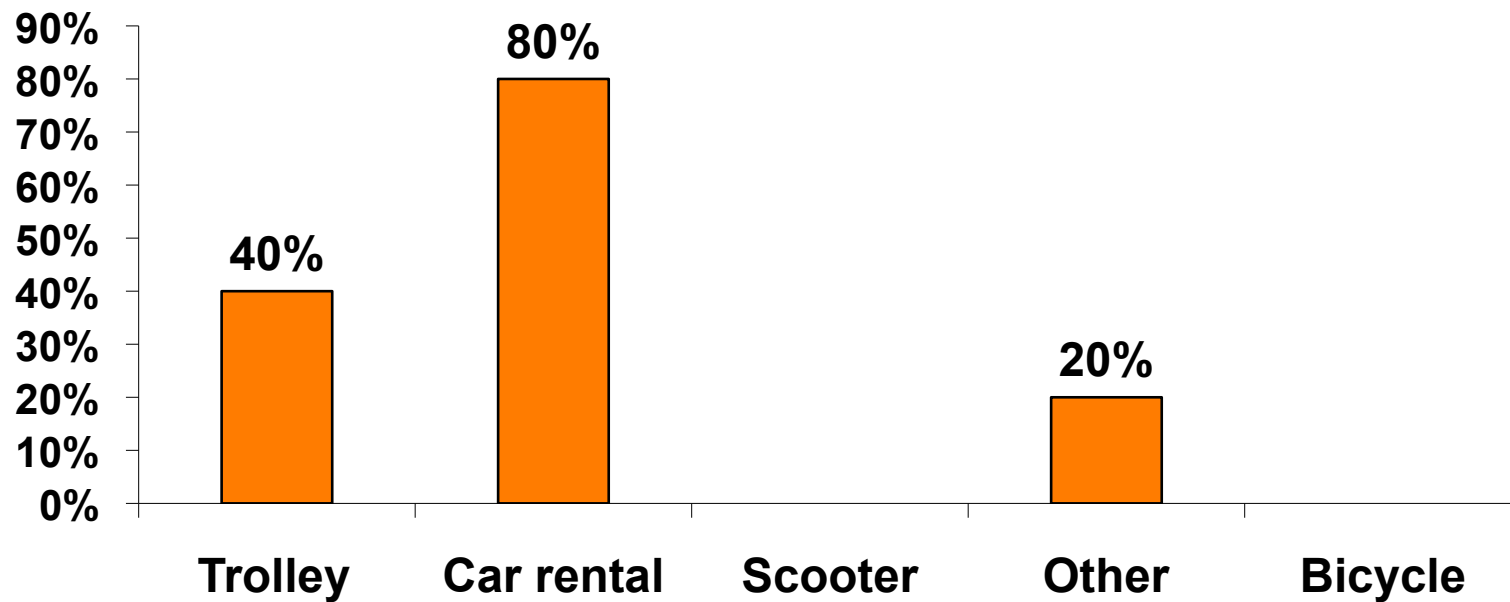
n=7



Mean=\$947.96 per travel party

# Prepaid Ground Transportation

n=5

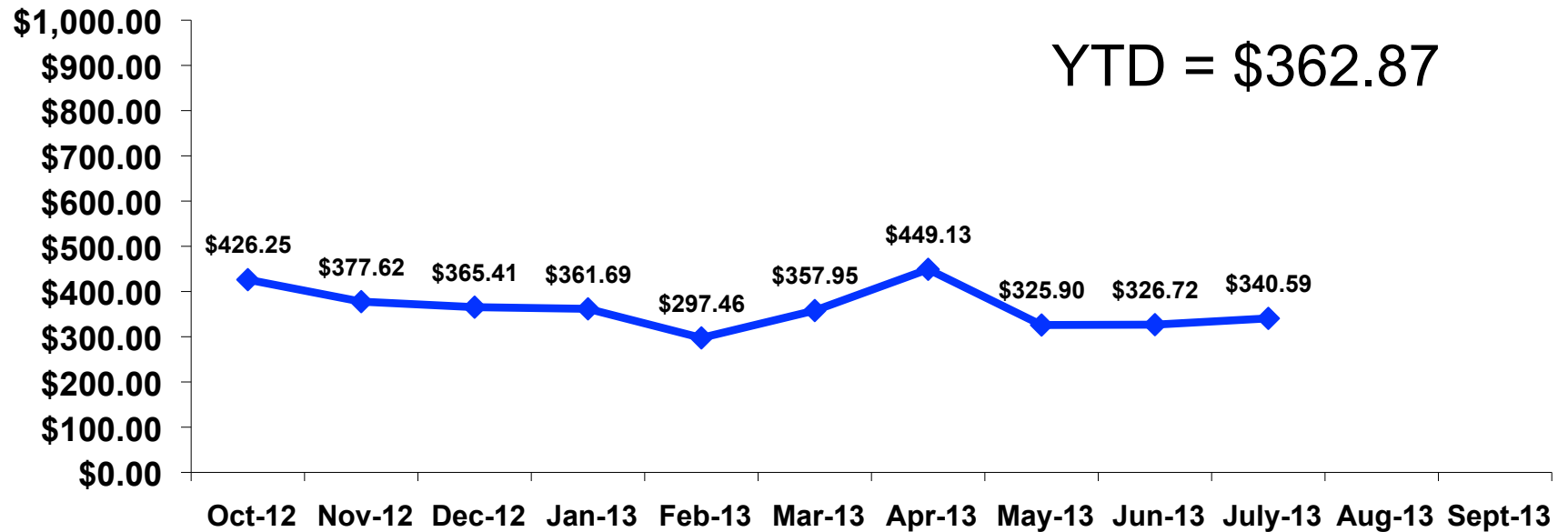


Mean=\$85.74 per travel party

# On-Island Expenditures

- \$801.47 = 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)
- \$340.59 = overall mean average per person on-island expenditure

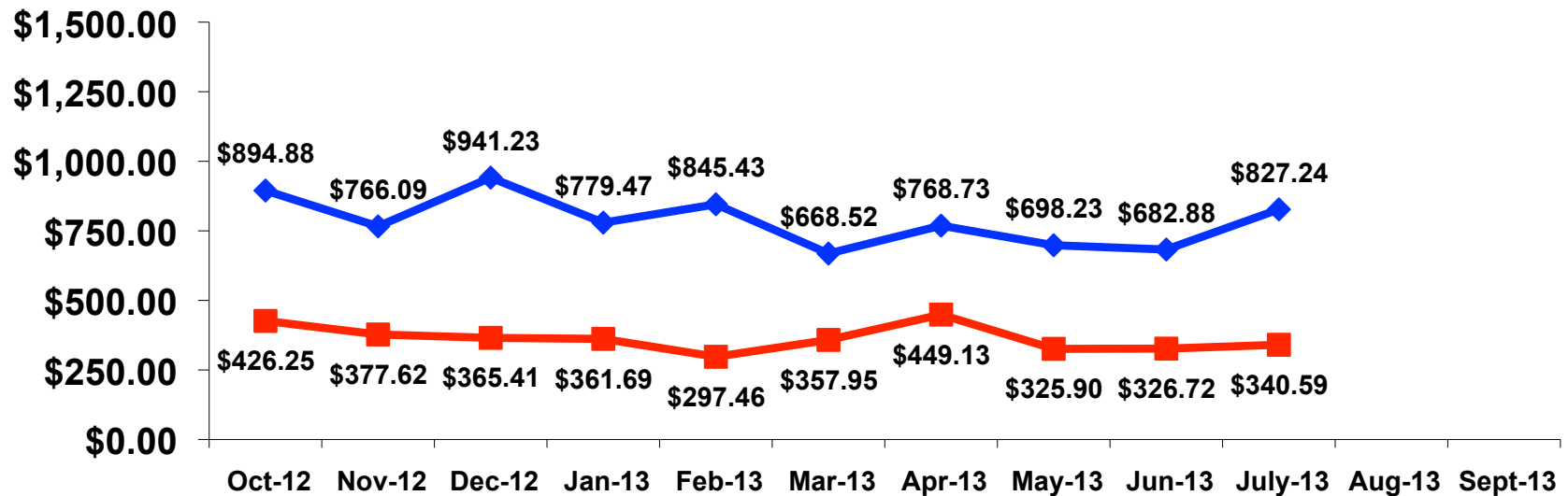
# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$787.24

On-Island YTD = \$362.87



# 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	\$340.59	\$318.98	\$362.32	\$64.60	\$373.76	\$269.06	\$139.84	\$261.91	\$416.66	\$268.35	\$797.50
	Median	\$250	\$250	\$250	\$23	\$327	\$167	\$100	\$223	\$380	\$200	\$795
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,915	\$2,915	\$1,600	\$200	\$2,915	\$1,267	\$400	\$654	\$1,500	\$1,250	\$1,600

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$52.90	\$69.38	\$36.33	\$2.71	\$48.26	\$64.47	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.51	\$28.69	\$34.34	\$27.86	\$29.24	\$34.82	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$94.81	\$93.93	\$95.71	\$52.19	\$119.70	\$71.36	\$24.44
	Median	\$0	\$0	\$0	\$0	\$40	\$0	\$0
OPT TOUR	Mean	\$94.06	\$87.75	\$100.41	\$109.29	\$91.03	\$98.38	\$80.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$157.78	\$155.19	\$160.38	\$47.62	\$193.98	\$119.44	\$133.33
	Median	\$0	\$0	\$50	\$0	\$50	\$0	\$0
GIFT- OTHER	Mean	\$87.60	\$76.69	\$98.57	\$53.29	\$89.20	\$94.21	\$22.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$43.11	\$46.64	\$39.56	\$32.57	\$52.95	\$32.21	\$6.22
	Median	\$6	\$0	\$10	\$8	\$24	\$0	\$0
OTHER	Mean	\$235.75	\$184.68	\$287.11	\$164.95	\$218.14	\$266.43	\$483.89
	Median	\$0	\$0	\$0	\$30	\$0	\$0	\$150
TOTAL	Mean	\$801.47	\$752.07	\$851.16	\$490.95	\$840.25	\$795.60	\$767.33
	Median	\$550	\$500	\$600	\$380	\$636	\$500	\$600



# On-Island Expenditures First Timers & Repeaters

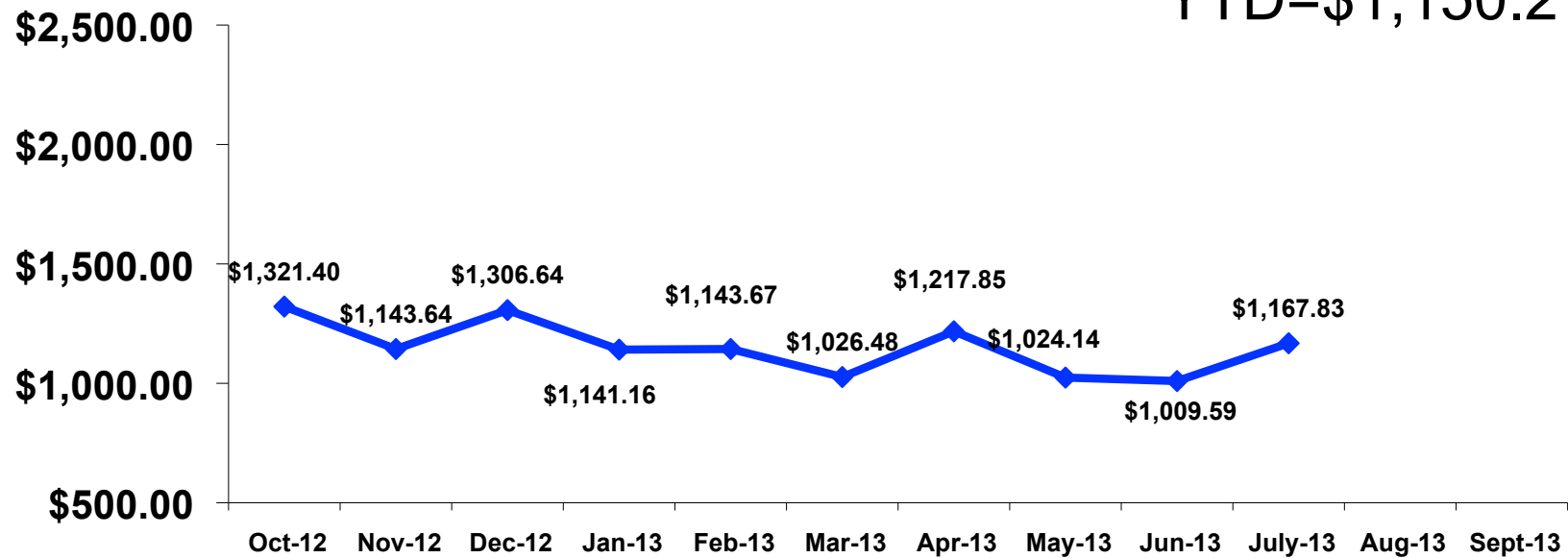
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$52.90	\$46.92	\$99.27
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$31.51	\$27.62	\$61.59
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$94.81	\$93.50	\$107.07
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$94.06	\$95.45	\$85.90
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$157.78	\$158.11	\$159.15
	Median	\$0	\$10	\$0
GIFT- OTHER	Mean	\$87.60	\$88.81	\$80.66
	Median	\$0	\$0	\$0
TRANS	Mean	\$43.11	\$42.84	\$46.22
	Median	\$6	\$10	\$0
OTHER	Mean	\$235.75	\$252.50	\$115.24
	Median	\$0	\$0	\$0
TOTAL	Mean	\$801.47	\$809.93	\$757.29
	Median	\$550	\$600	\$500

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

- \$1,167.83 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,037 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$1,150.21



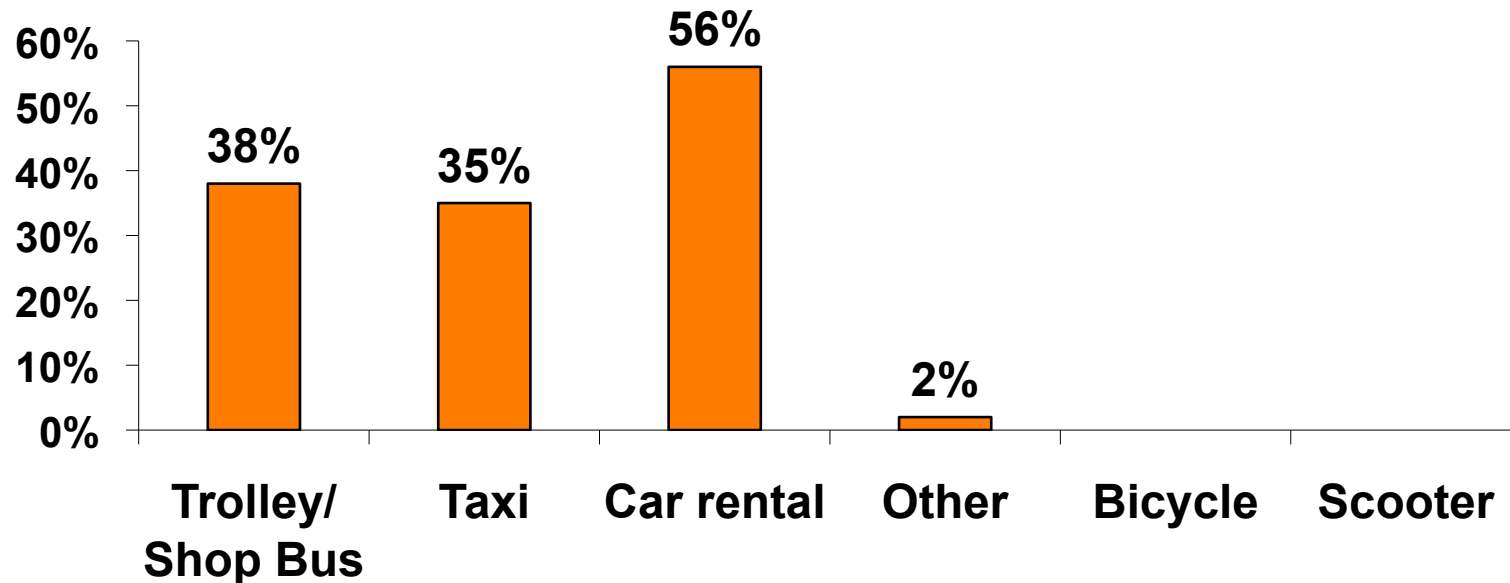
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# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$52.90
Food & beverage in fast food restaurant/ convenience store	\$31.51
Food & beverage at restaurants or drinking establishments outside a hotel	\$94.81
Optional tours and activities	\$94.06
Gifts/ souvenirs for yourself/companions	\$157.78
Gifts/ souvenirs for friends/family at home	\$87.60
Local transportation	\$43.11
Other expenses not covered	\$235.75
<b>Average Total</b>	<b>\$801.47</b>

# Local Transportation

n=164



Mean=\$43.11 per travel party

# Guam Airport Expenditures

- \$60.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)

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# Breakdown of Airport Expenditures

	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	<b>\$5.95</b>
<b>Gifts/Souvenirs Self</b>	<b>\$24.79</b>
<b>Gifts/Souvenirs Others</b>	<b>\$29.25</b>
<b>Total</b>	<b>\$60.00</b>

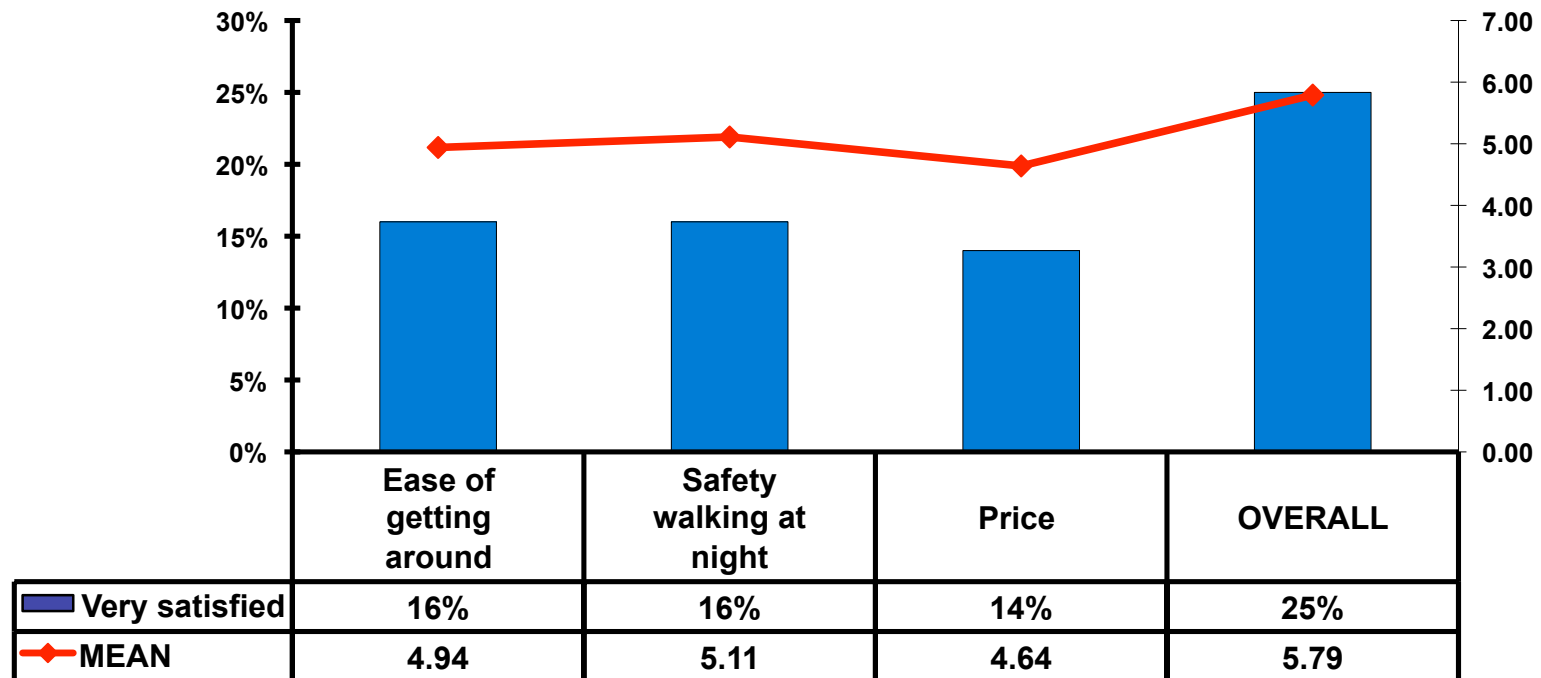
# SECTION 4 **VISITOR SATISFACTION**



# Satisfaction Scores Overall

7pt Rating Scale

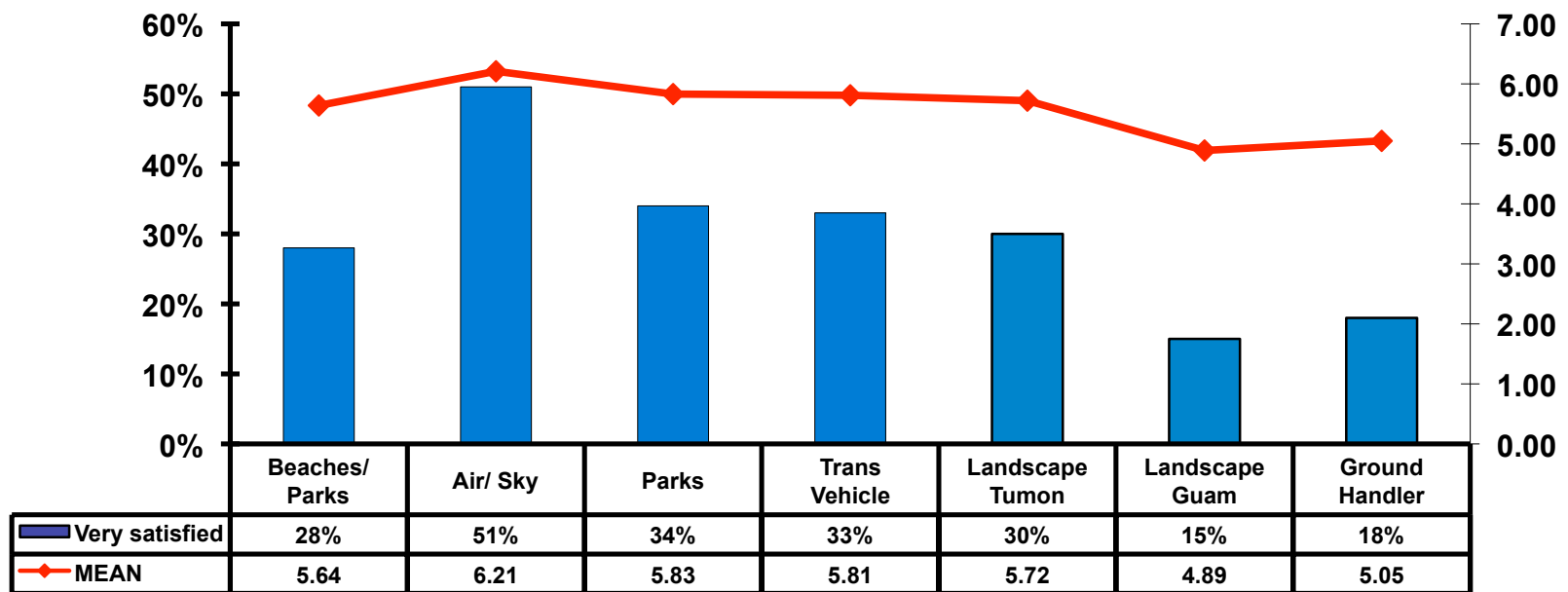
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

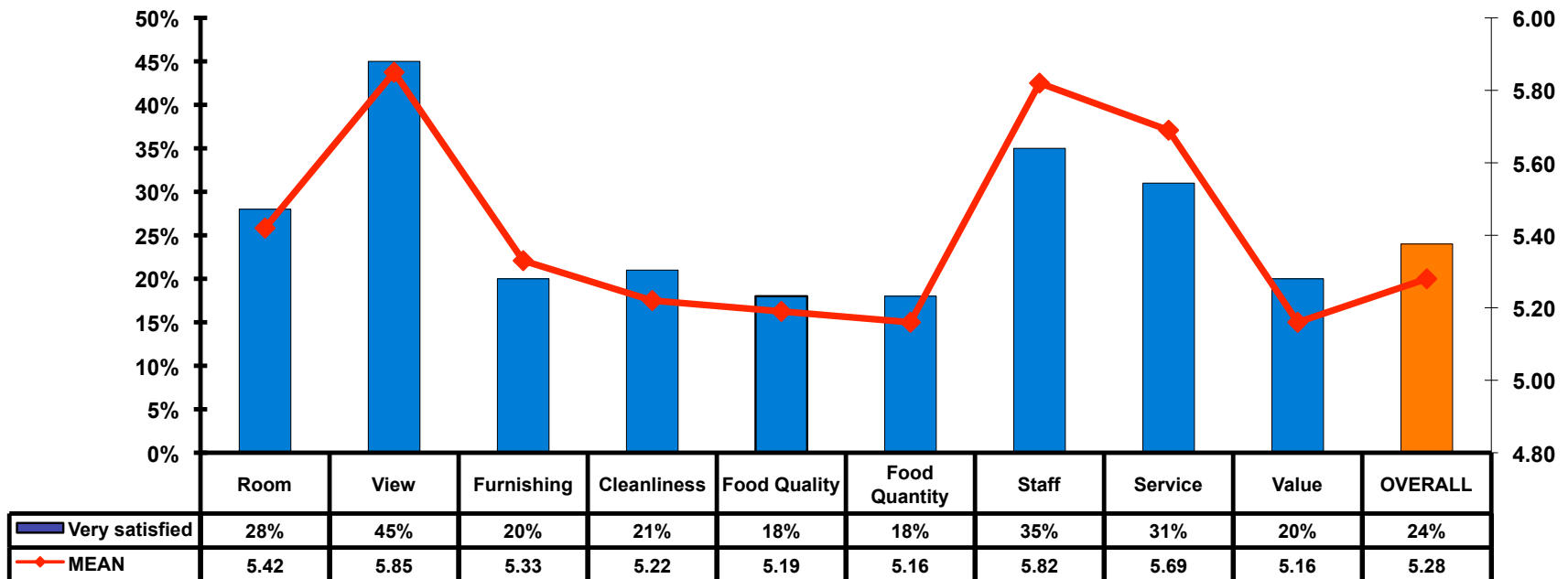
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

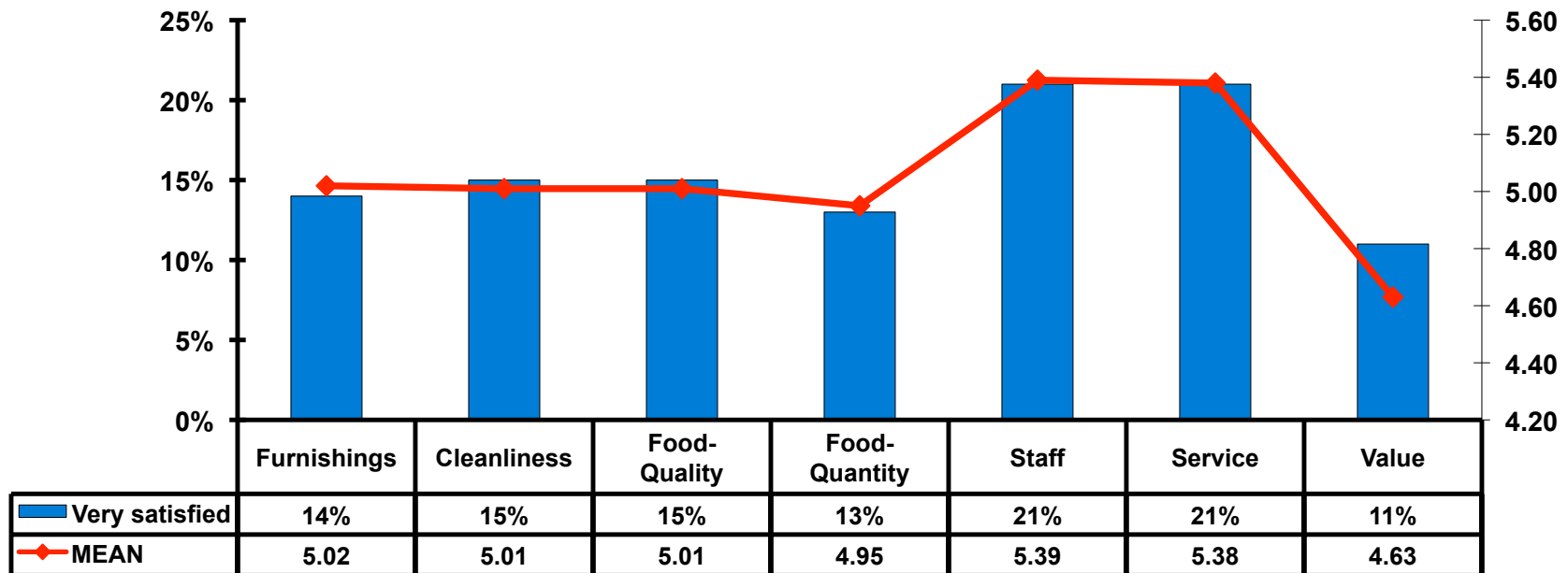
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

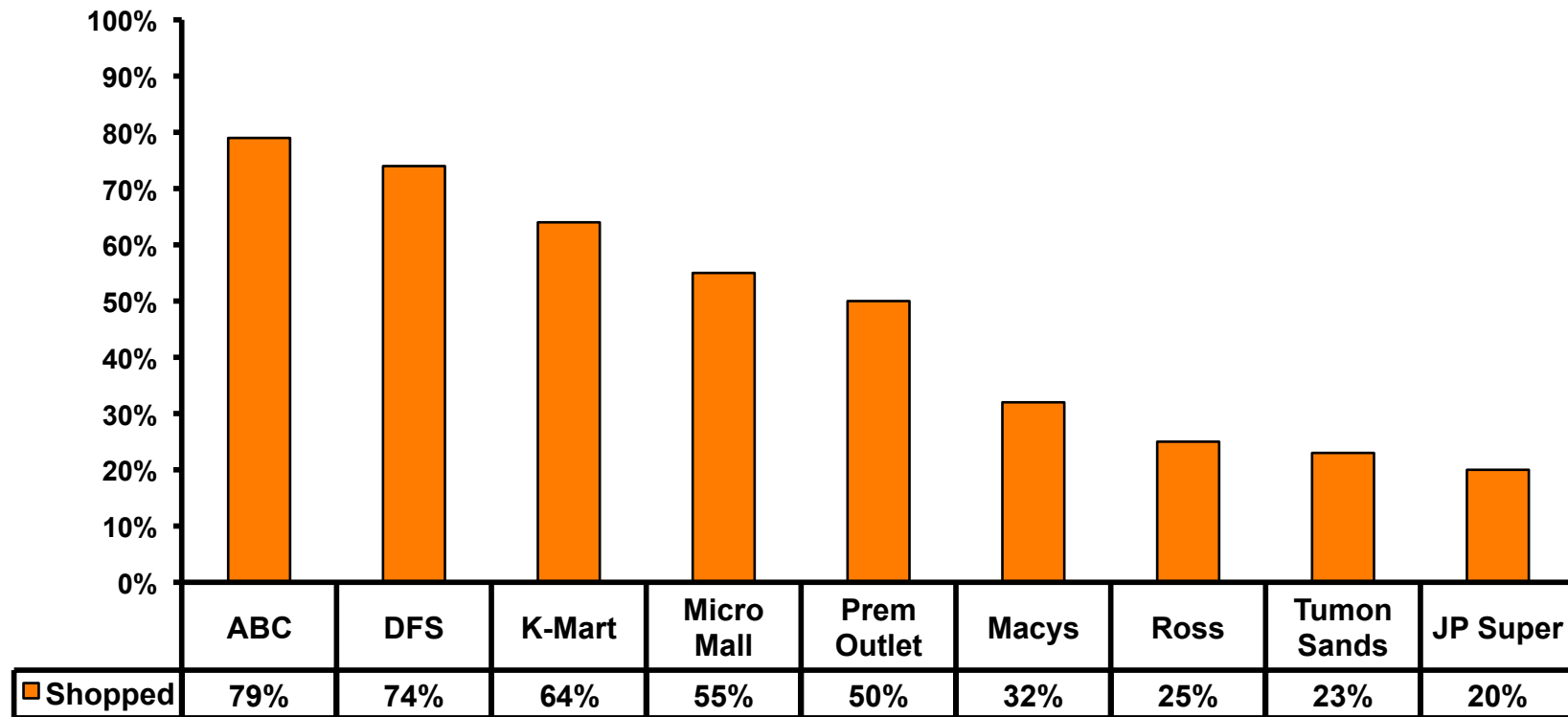
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

7pt Rating Scale

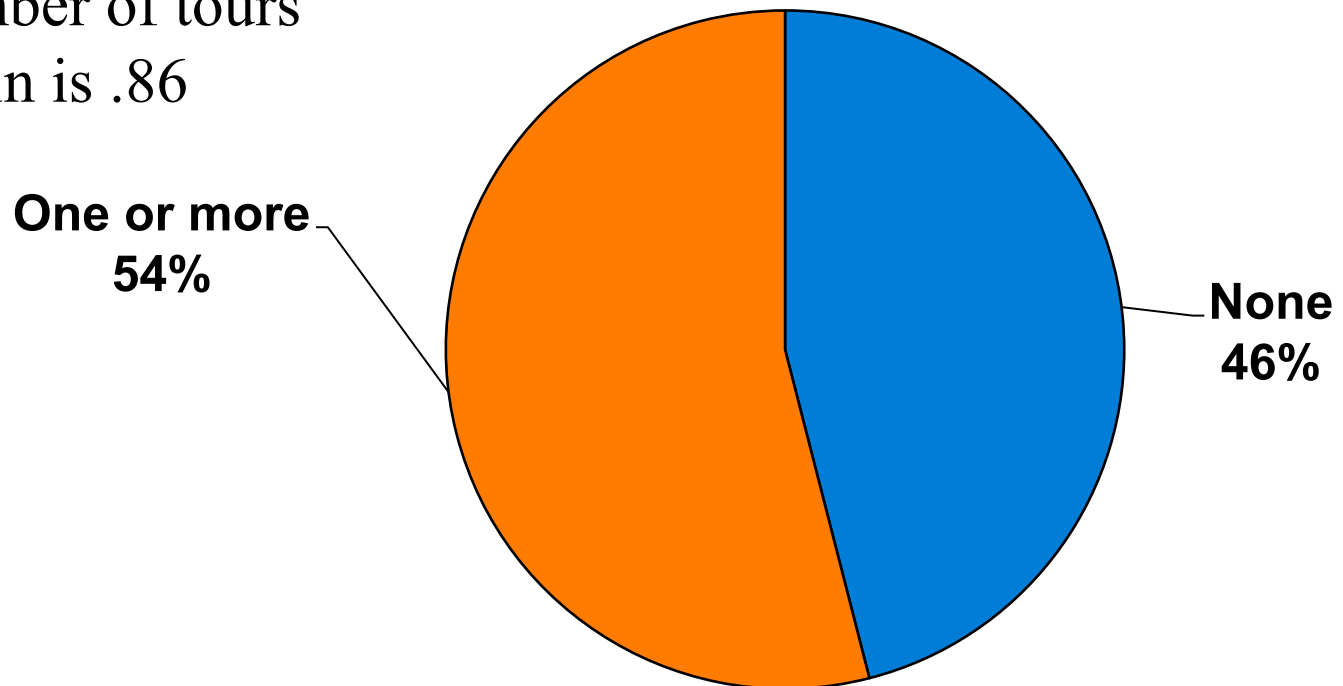
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>47%</b>	Score of 6 to 7 = <b>41%</b>
Score of 4 to 5 = <b>41%</b>	Score of 4 to 5 = <b>42%</b>
Score 1 to 3 = <b>11%</b>	Score 1 to 3 = <b>16%</b>
<b>MEAN = 5.17</b>	<b>MEAN = 4.95</b>

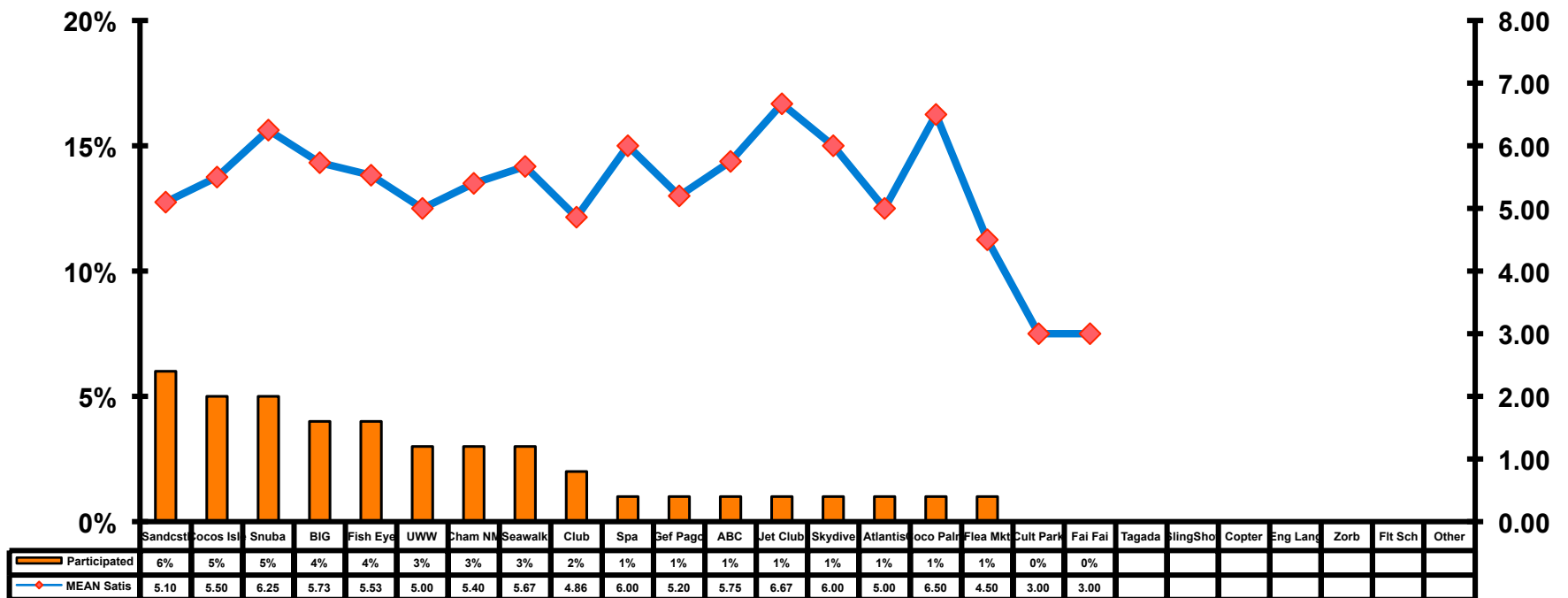
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# Optional Tour Participation

- Average number of tours participated in is .86



# 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>43%</b>	Score of 6 to 7 = <b>35%</b>
Score of 4 to 5 = <b>50%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>7%</b>	Score 1 to 3 = <b>11%</b>
<b>MEAN = 5.12</b>	<b>MEAN = 4.94</b>

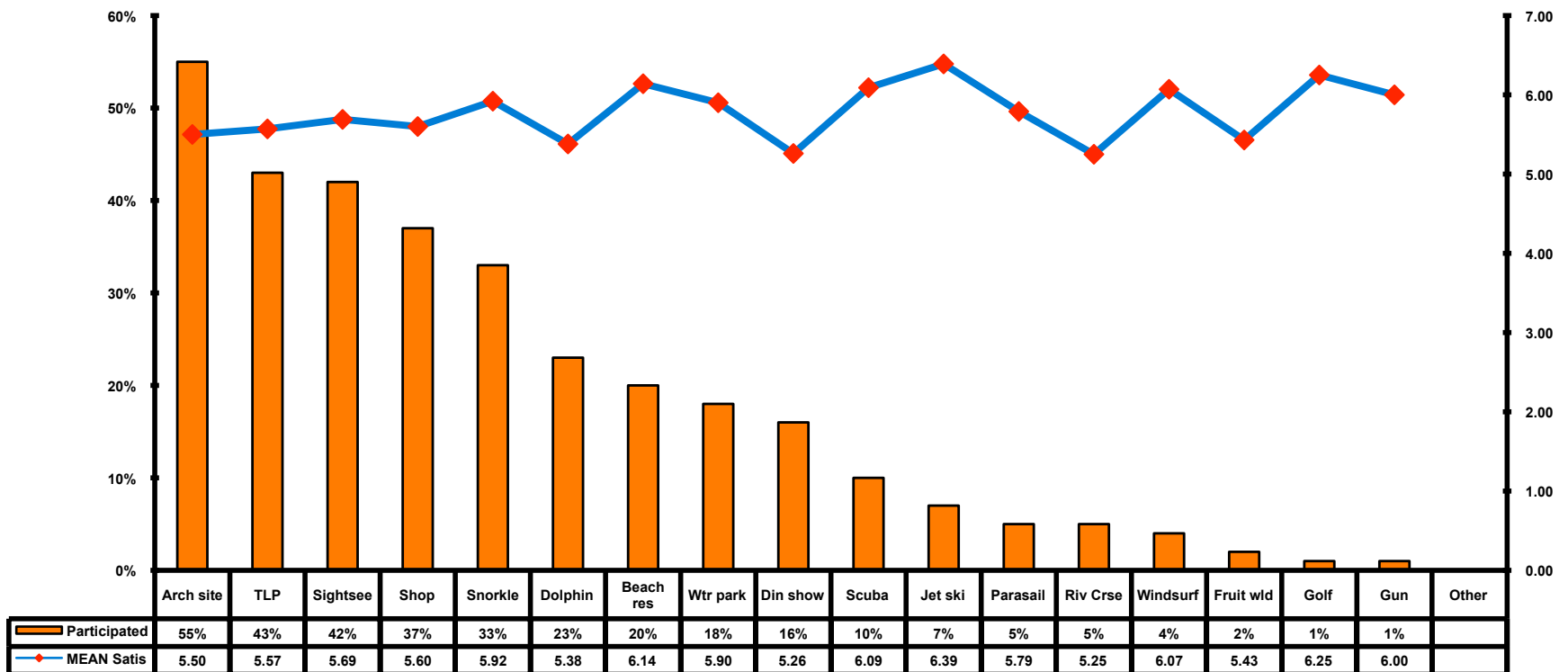
# Night Tours Satisfaction

7pt Rating Scale

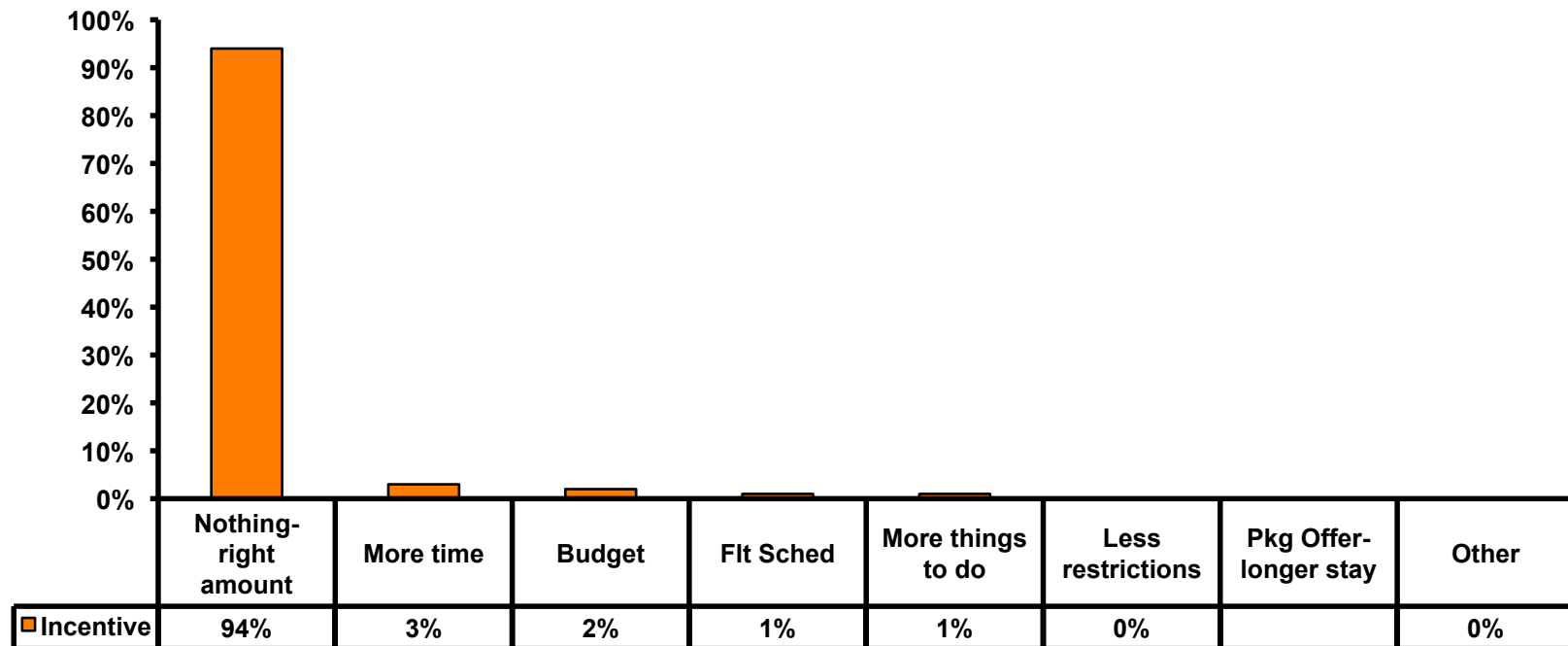
7=Very Satisfied/ 1=Very Dissatisfied

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>26%</b>	Score of 6 to 7 = <b>27%</b>
Score of 4 to 5 = <b>61%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>13%</b>	Score 1 to 3 = <b>18%</b>
<b>MEAN = 4.66</b>	<b>MEAN = 4.59</b>

# Satisfaction with Other Activities



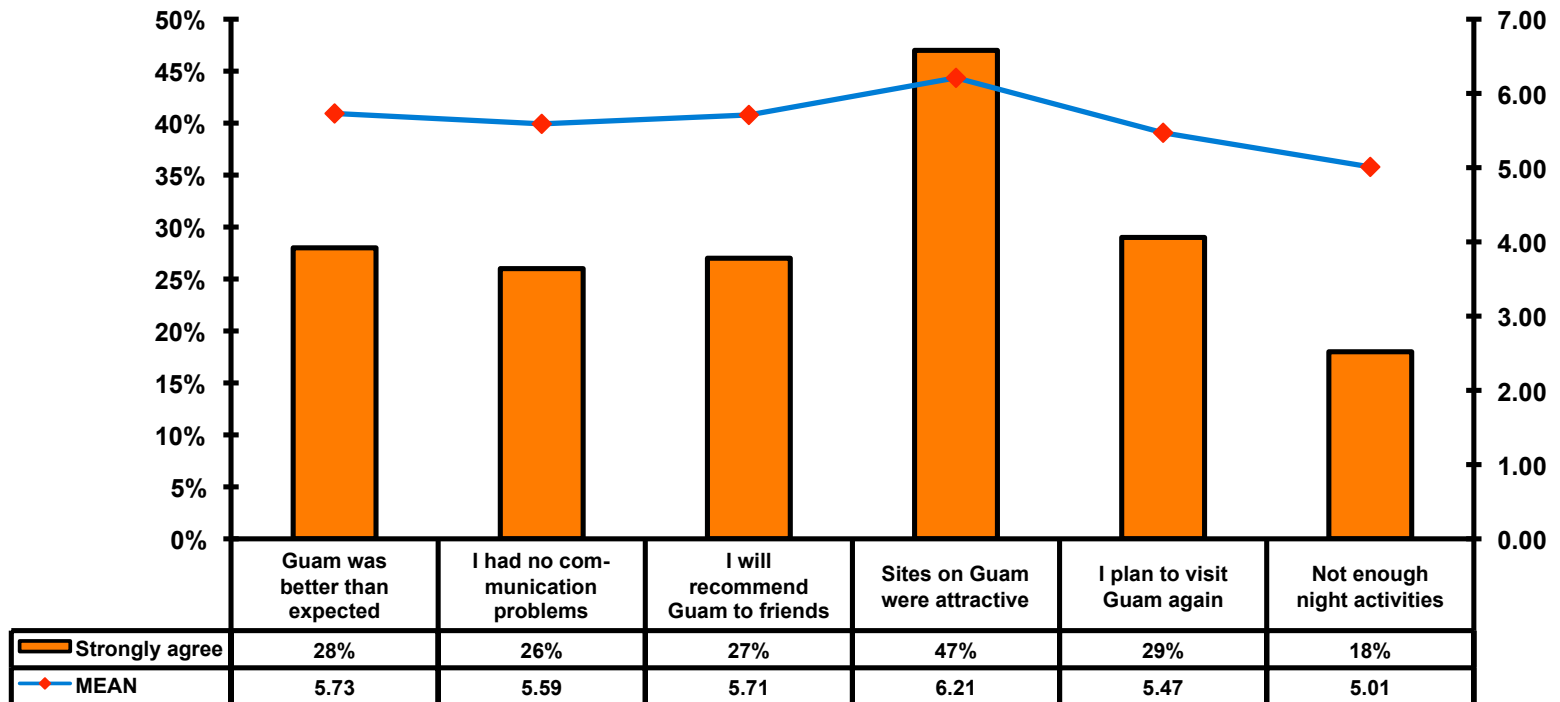
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

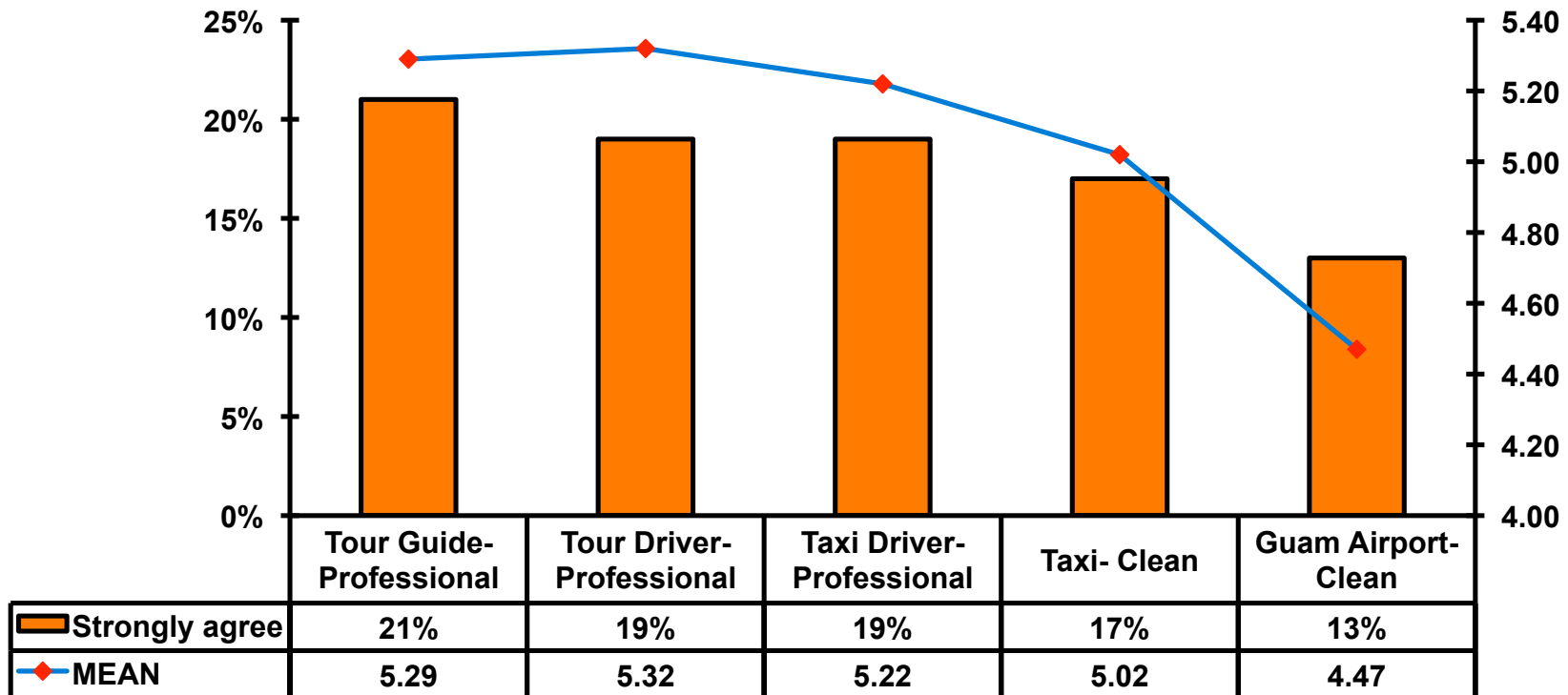
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

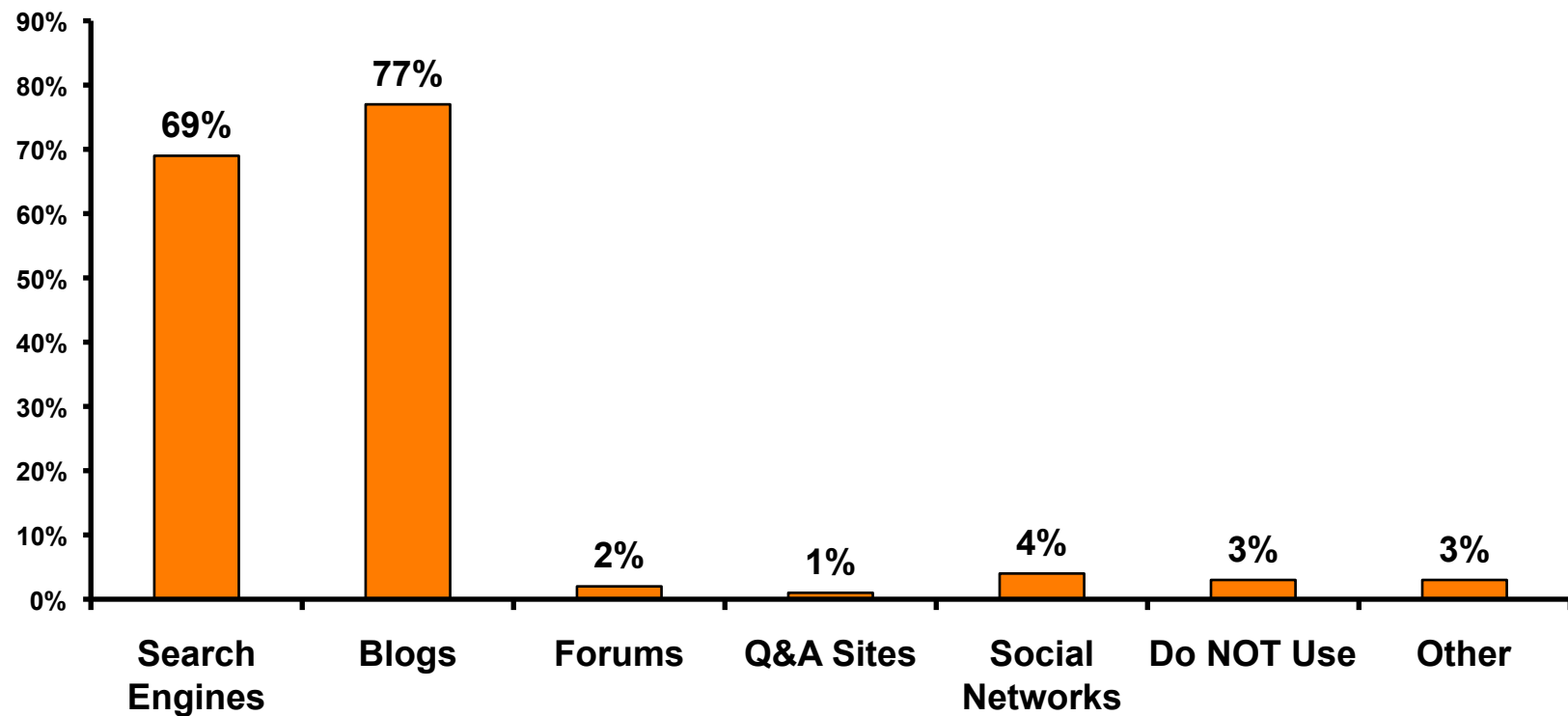
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

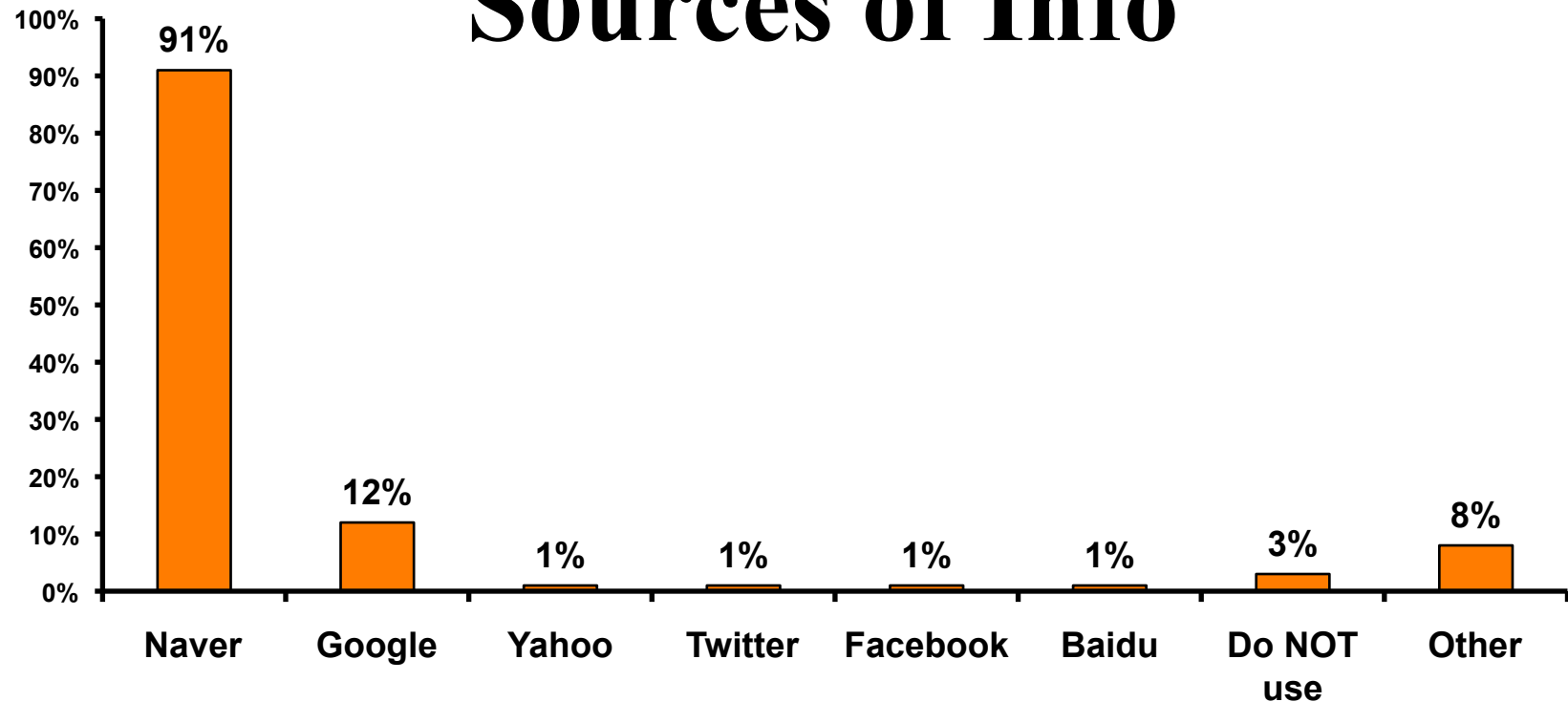
# Internet- Guam Sources of Info



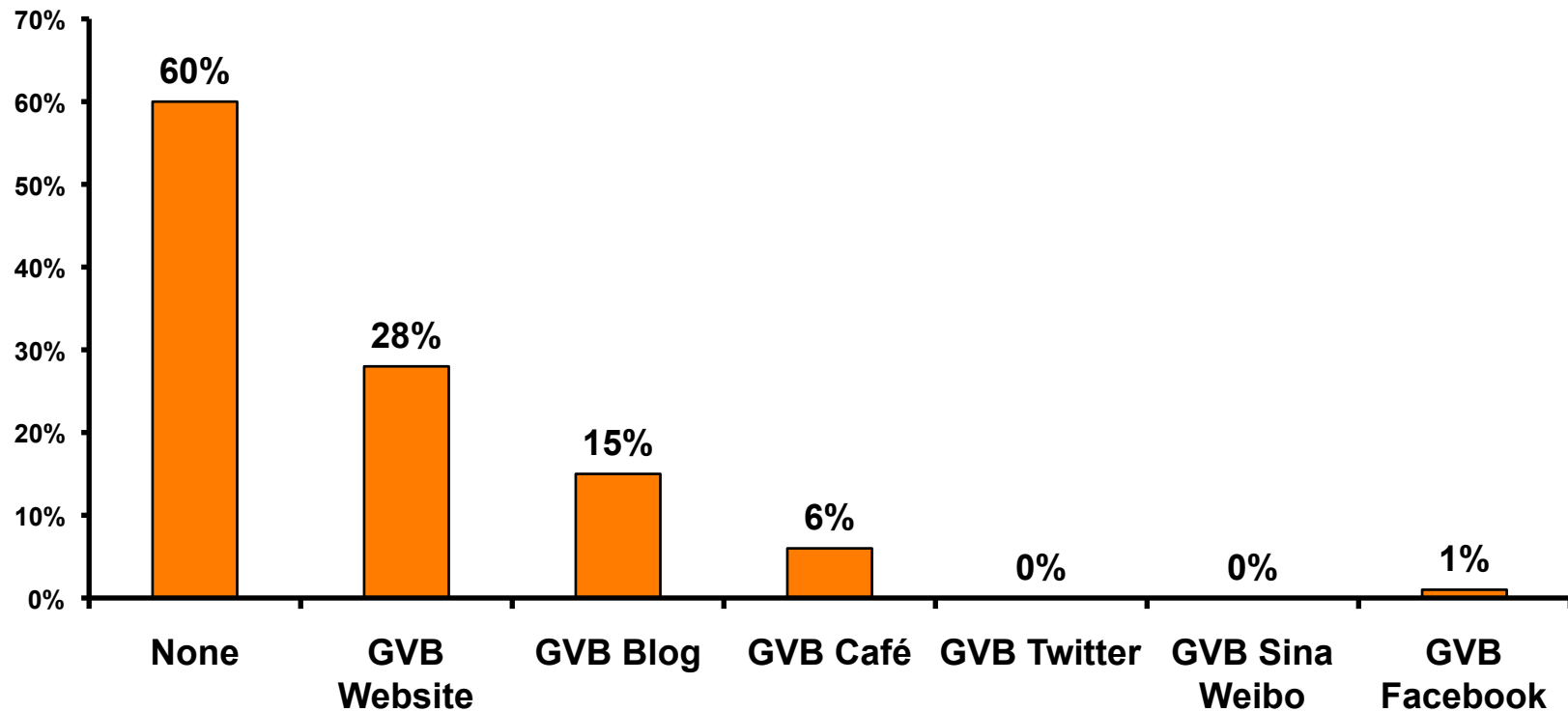


# Internet- Things To Do

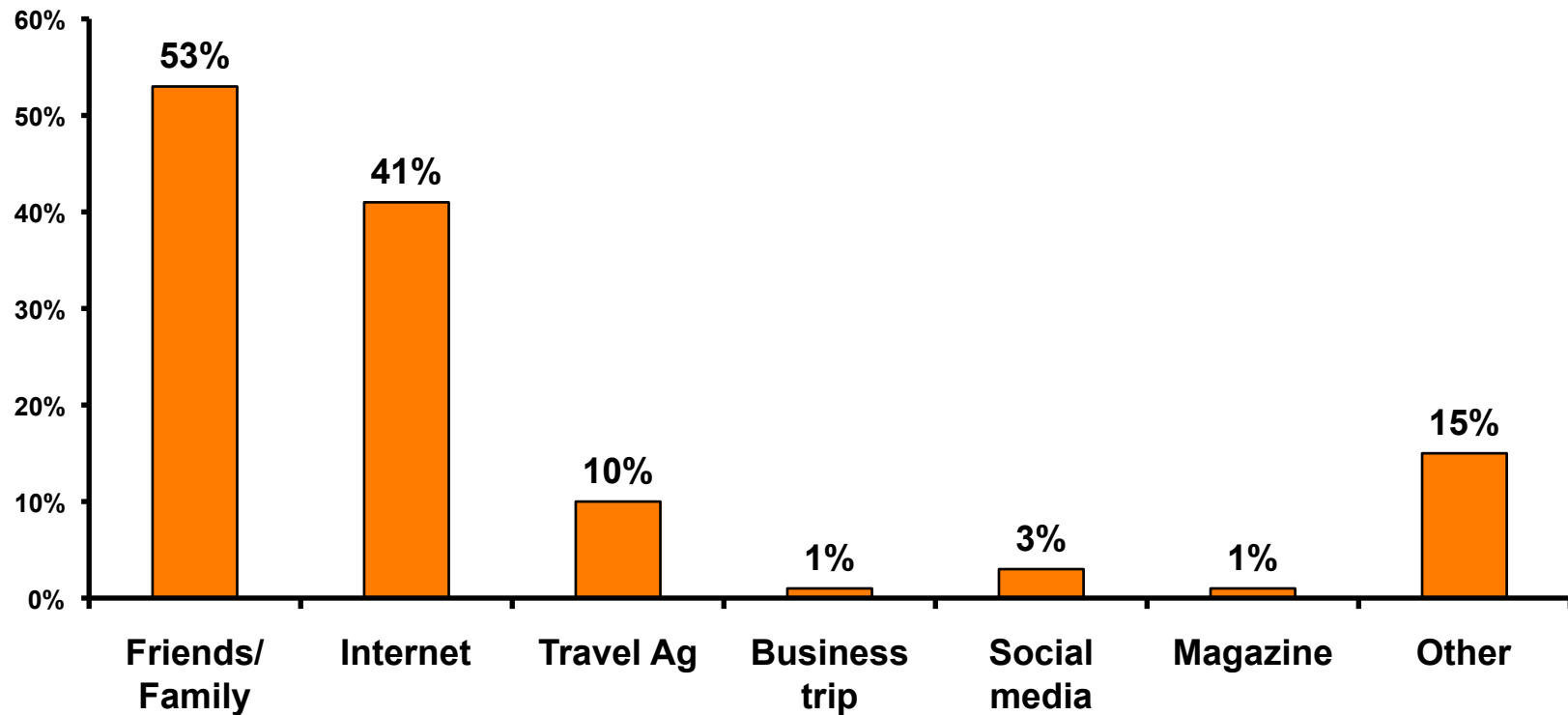
## Sources of Info



# Internet- GVB Sources

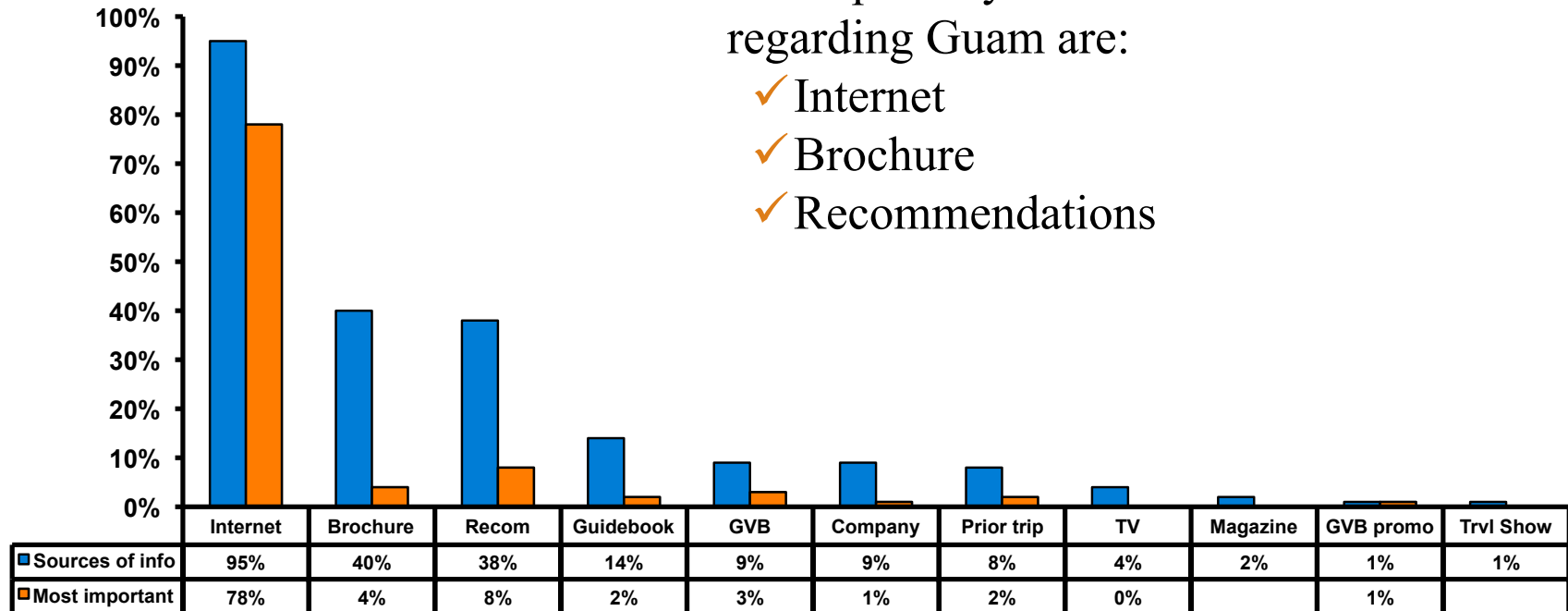


# Travel Motivation- Info Sources



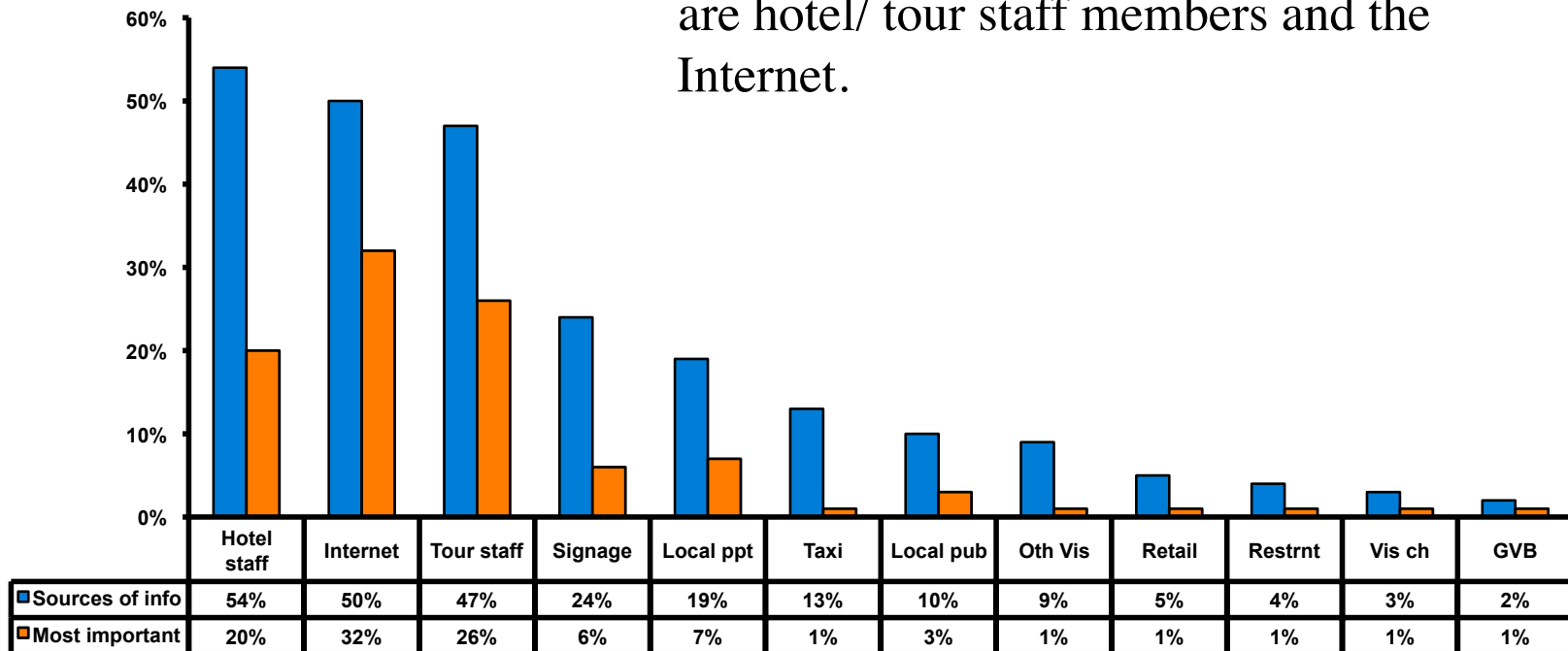
# Sources of Information Pre-arrival

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



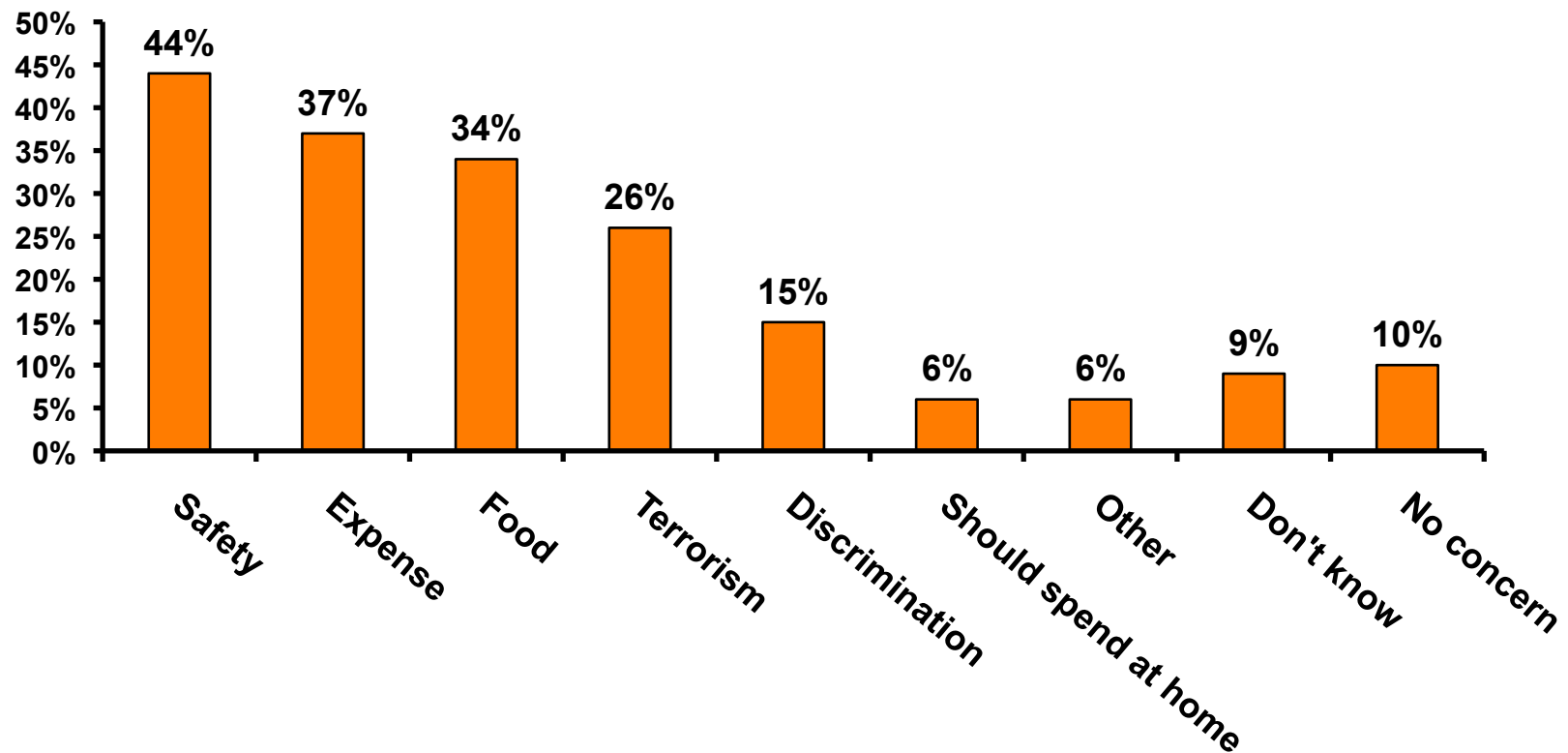
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

# Concerns about travel outside of Korea - Overall

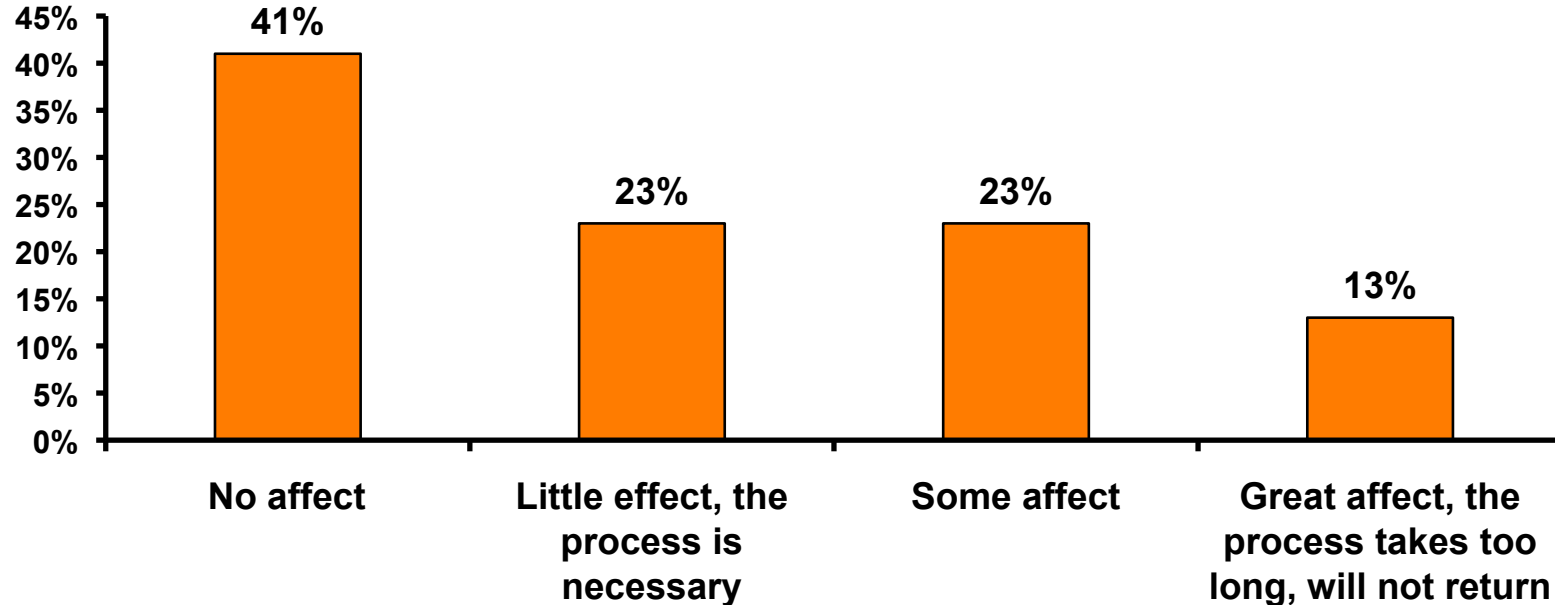


# Concerns about travel outside of Korea - By Age & Income

		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	44%	29%	40%	53%	44%	17%	36%	37%	47%	45%	44%	56%	14%	
	Expense	37%	29%	41%	34%	22%	50%	27%	31%	40%	59%	28%	38%	29%	
	Food	34%	24%	37%	32%	11%	33%	36%	26%	40%	49%	26%	32%	57%	
	Terrorism	26%	24%	27%	26%	22%		36%	31%	33%	27%	13%	29%	14%	
	Discrimination against Koreans	15%	5%	16%	17%	11%			9%	13%	20%	22%	20%	14%	
	No concerns	10%	14%	11%	8%	22%		18%	11%	7%	4%	20%	9%	29%	
	Don't know	9%	5%	9%	7%	22%	33%		9%	4%	4%	7%	10%		
	Other	6%	10%	6%	5%		17%		7%	5%	4%	7%	5%		
	Should spend at home	6%	19%	7%	2%			9%	9%	4%	2%	6%	5%	14%	
	Total	Count	349	21	188	125	9	6	11	54	55	51	54	93	7



# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

