



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **FY2013**

### **MARCH 2013**



**Prepared by: QMark Research**

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# Background & Methodology

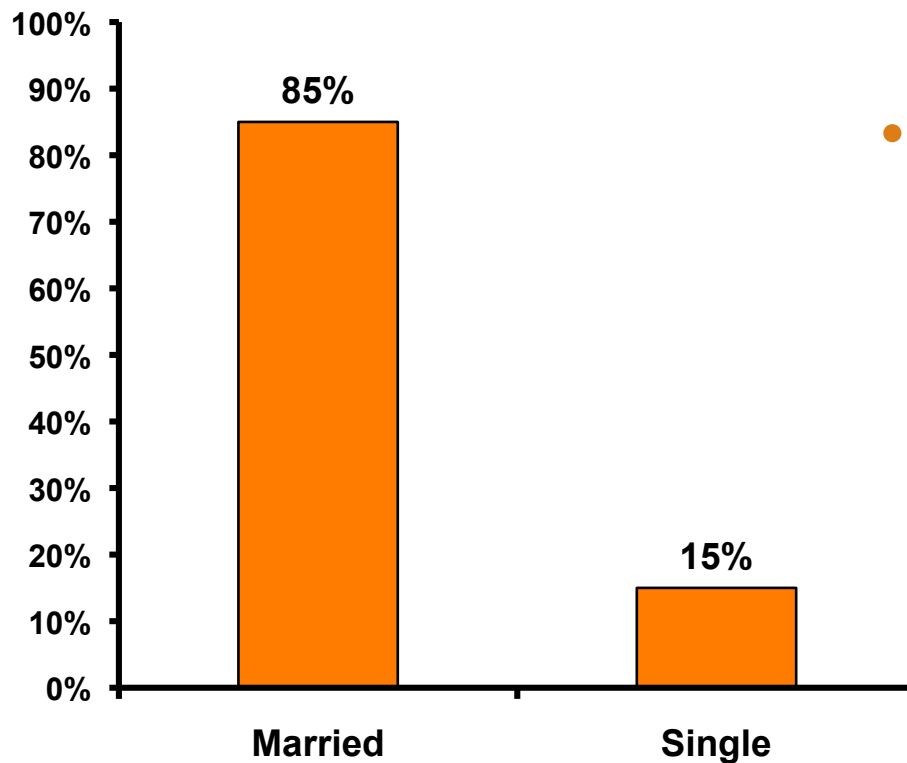
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

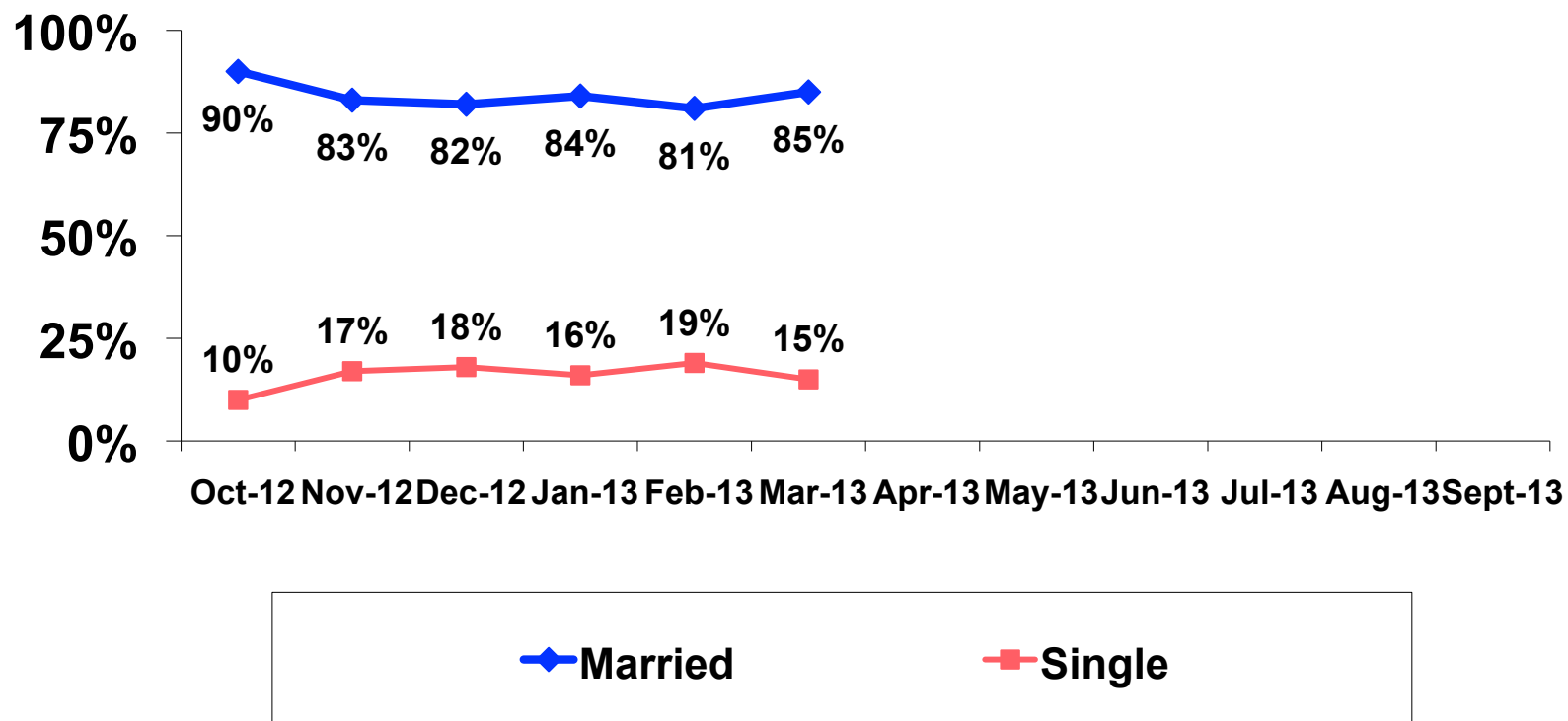
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

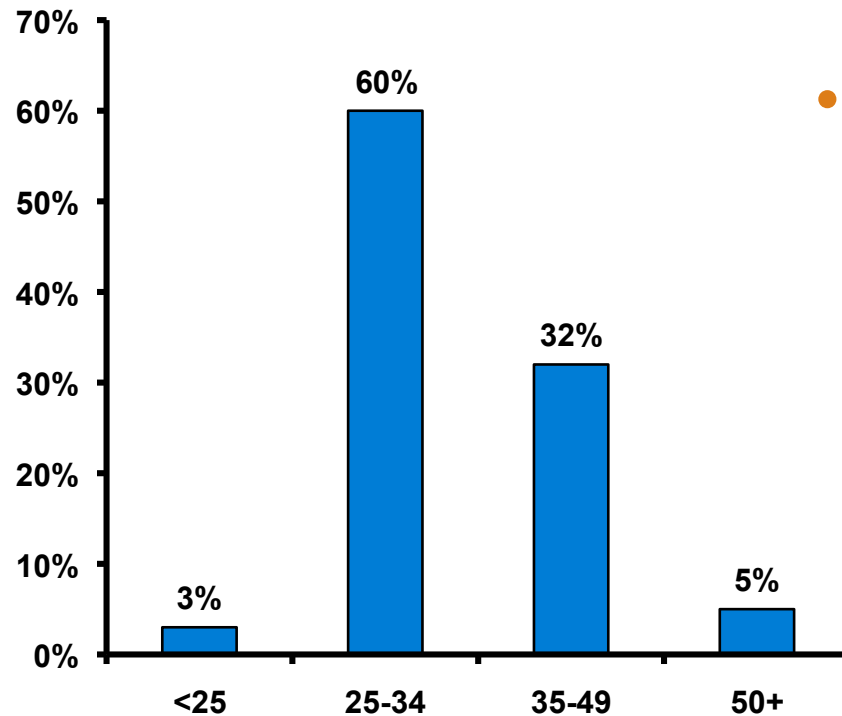


- Majority of Korean visitors are married.

# Marital Status

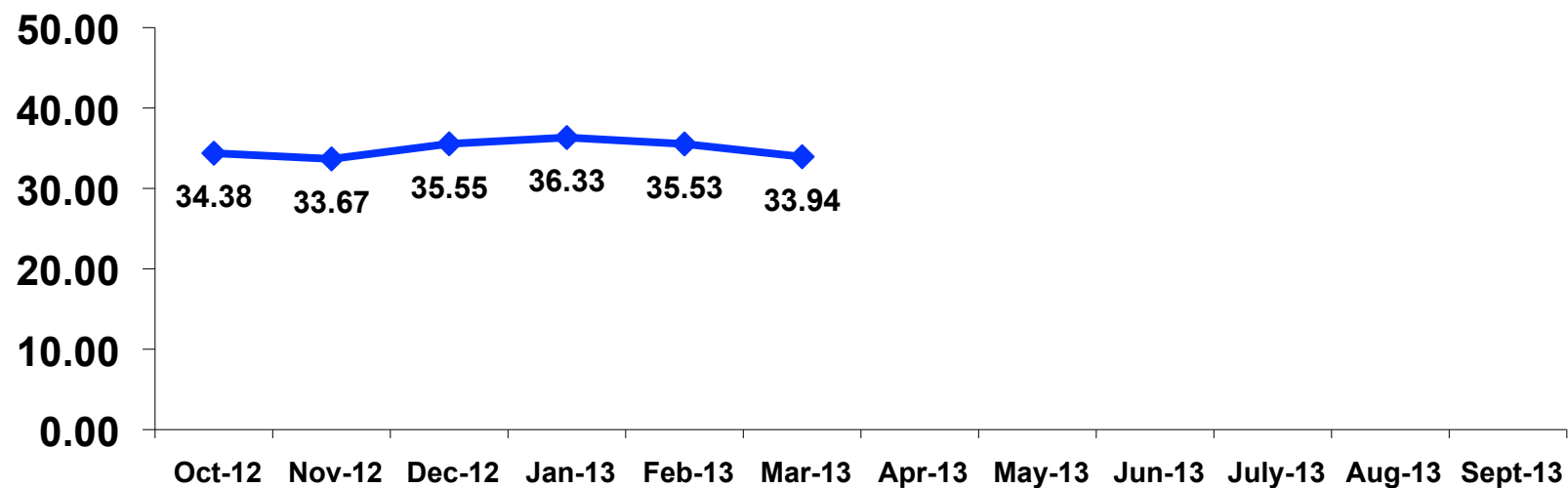


# Age - Overall



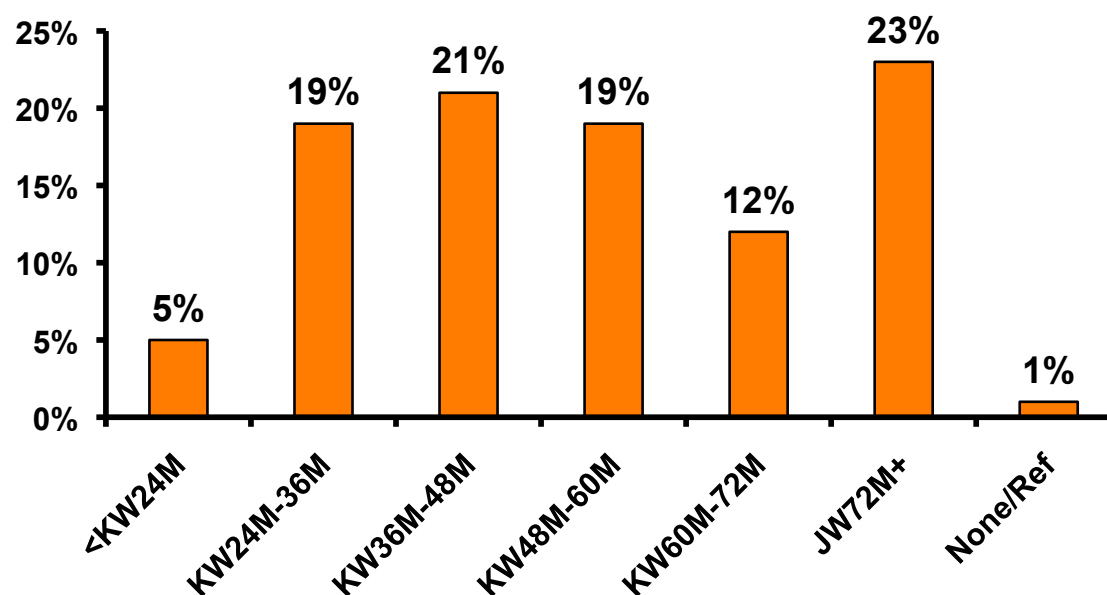
- The average age of the respondents is 33.94 years of age.

# Average Age



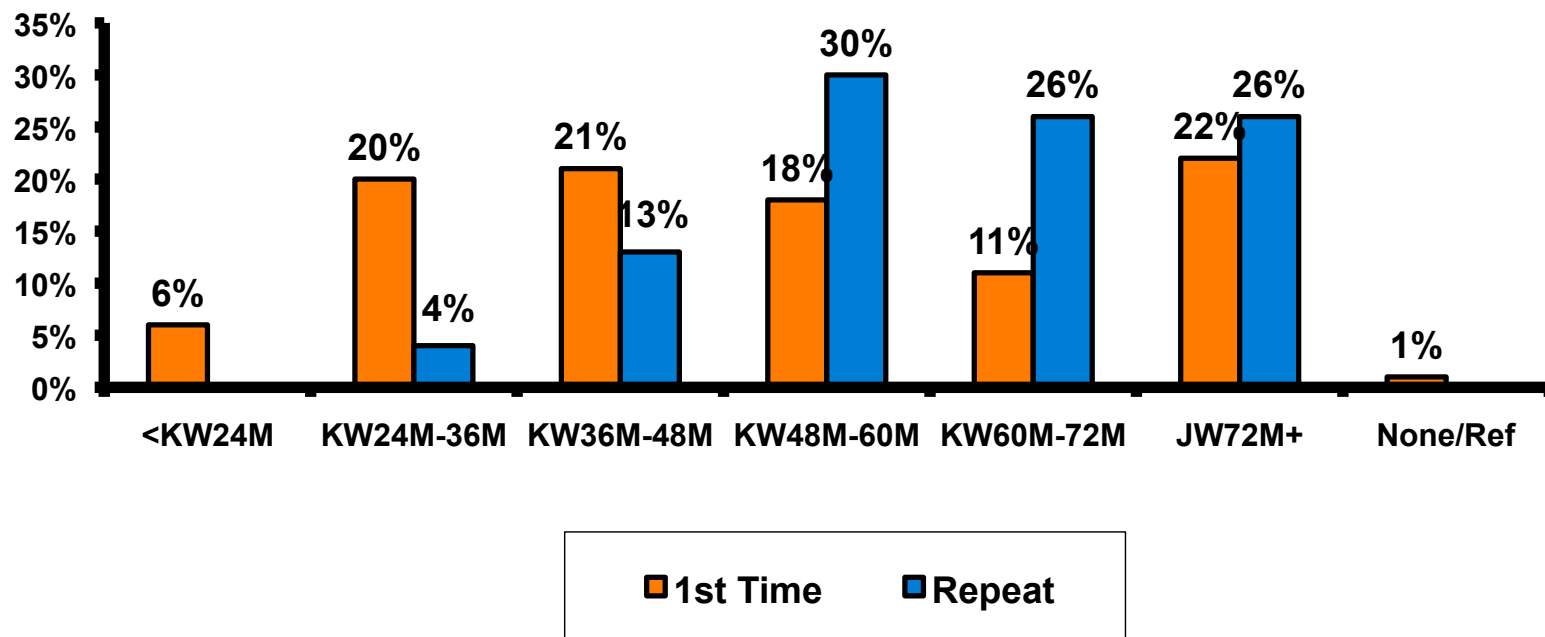


# Personal Income



• KW1103.61=\$1

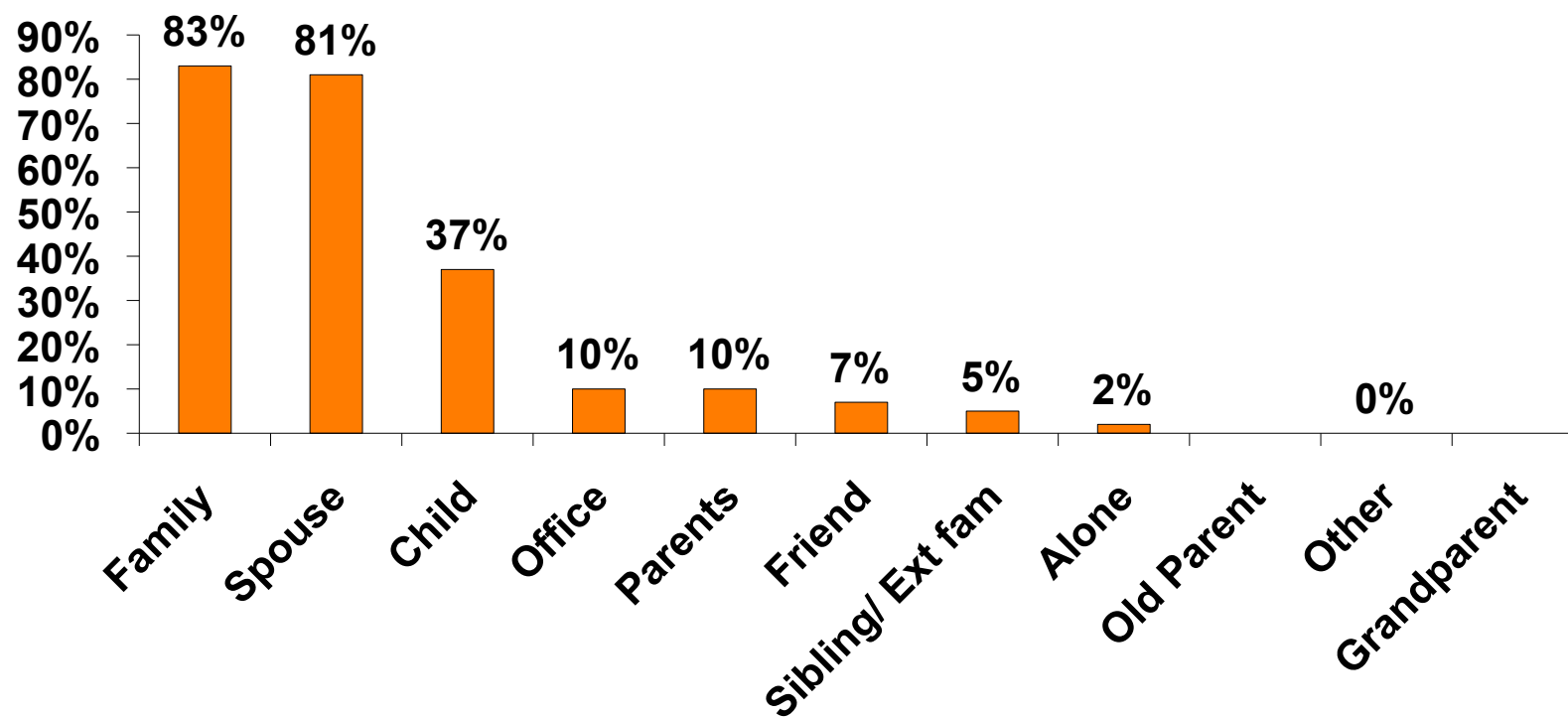
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	KW12.0M-KW24.0M	Count	15	7	8	4	11		
		Column N %	5%	5%	6%	67%	6%		
	KW24.0M-KW36.0M	Count	55	27	28		47	8	
		Column N %	19%	18%	20%		27%	8%	
	KW36.0M-KW48.0M	Count	61	30	31	1	35	21	3
		Column N %	21%	20%	22%	17%	20%	22%	25%
	KW48.0M-KW60.0M	Count	57	32	25	1	32	19	3
		Column N %	19%	21%	17%	17%	18%	20%	25%
	KW60.0M-KW72.0M	Count	36	19	17		18	18	
		Column N %	12%	13%	12%		10%	19%	
	KW72.0M+	Count	67	34	32		29	31	5
		Column N %	23%	23%	22%		17%	32%	42%
	No Income	Count	4	2	2		3		1
		Column N %	1%	1%	1%		2%		8%
	Total	Count	295	151	143	6	175	97	12

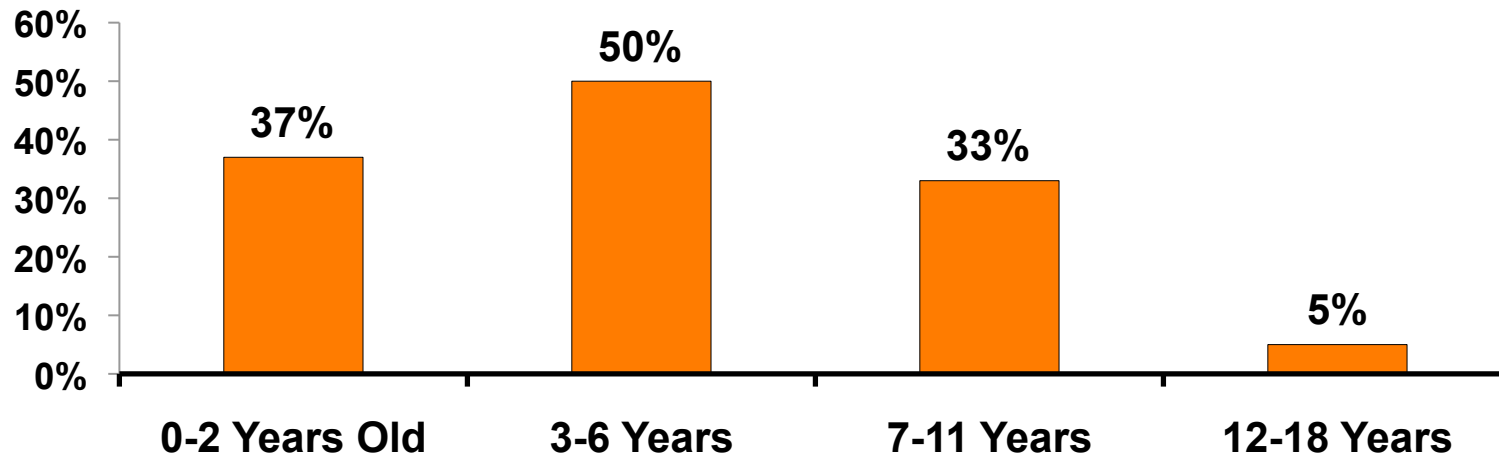
# Travel Companions



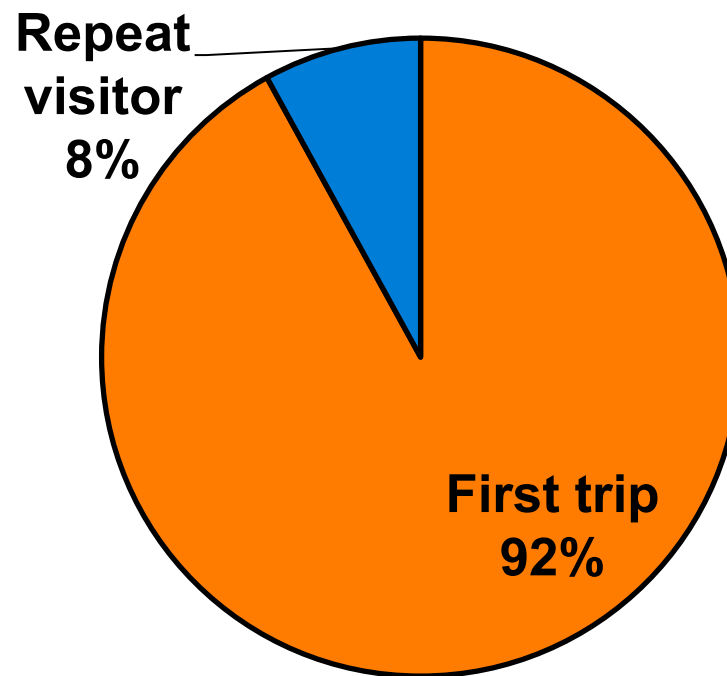
# Number of Children Travel Party

N=131 total respondents traveling with children.

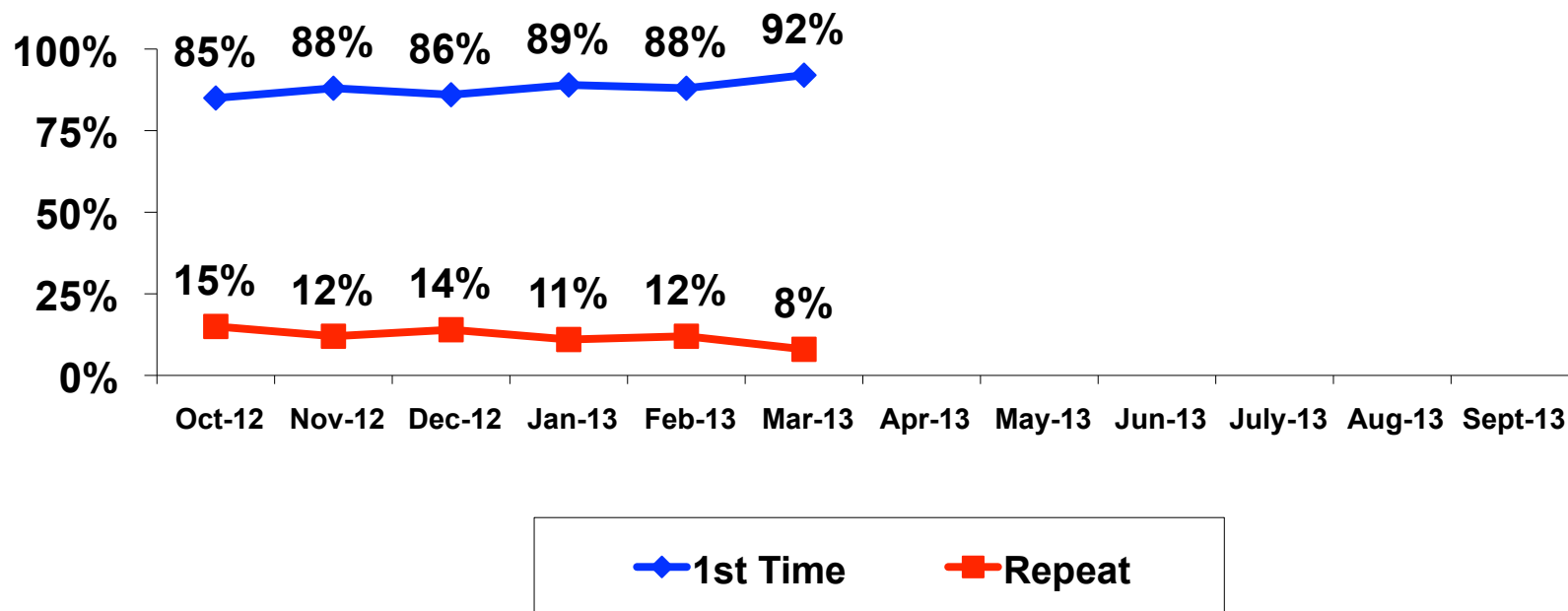
(Of those N=131 respondents, there is a total of 183 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

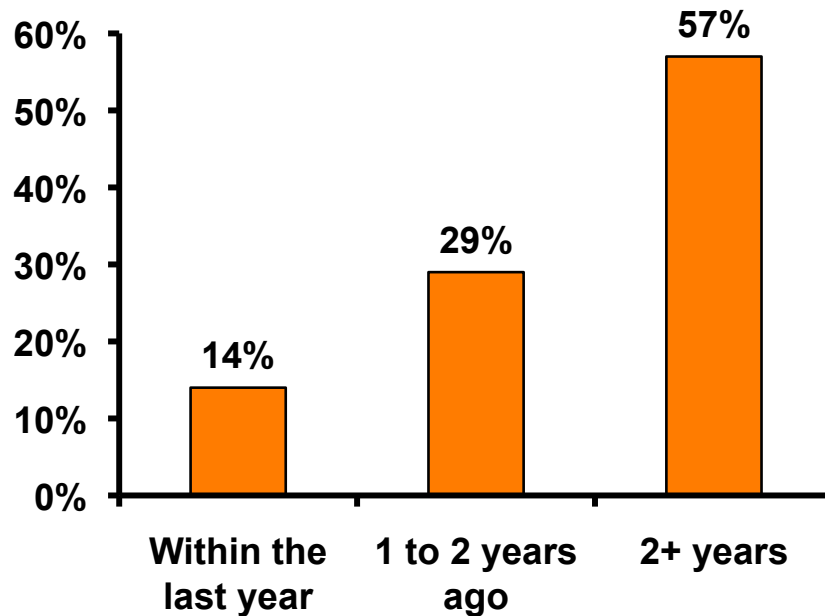
			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	175	160	14
		Column N %	50%	50%	50%
	Female	Count	175	161	14
		Column N %	50%	50%	50%
AGE	Total	Count	350	321	28
	18-24	Count	10	10	
		Column N %	3%	3%	
	25-34	Count	208	197	10
		Column N %	60%	62%	37%
	35-49	Count	109	93	16
		Column N %	32%	29%	59%
	50+	Count	18	17	1
		Column N %	5%	5%	4%
	Total	Count	345	317	27

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



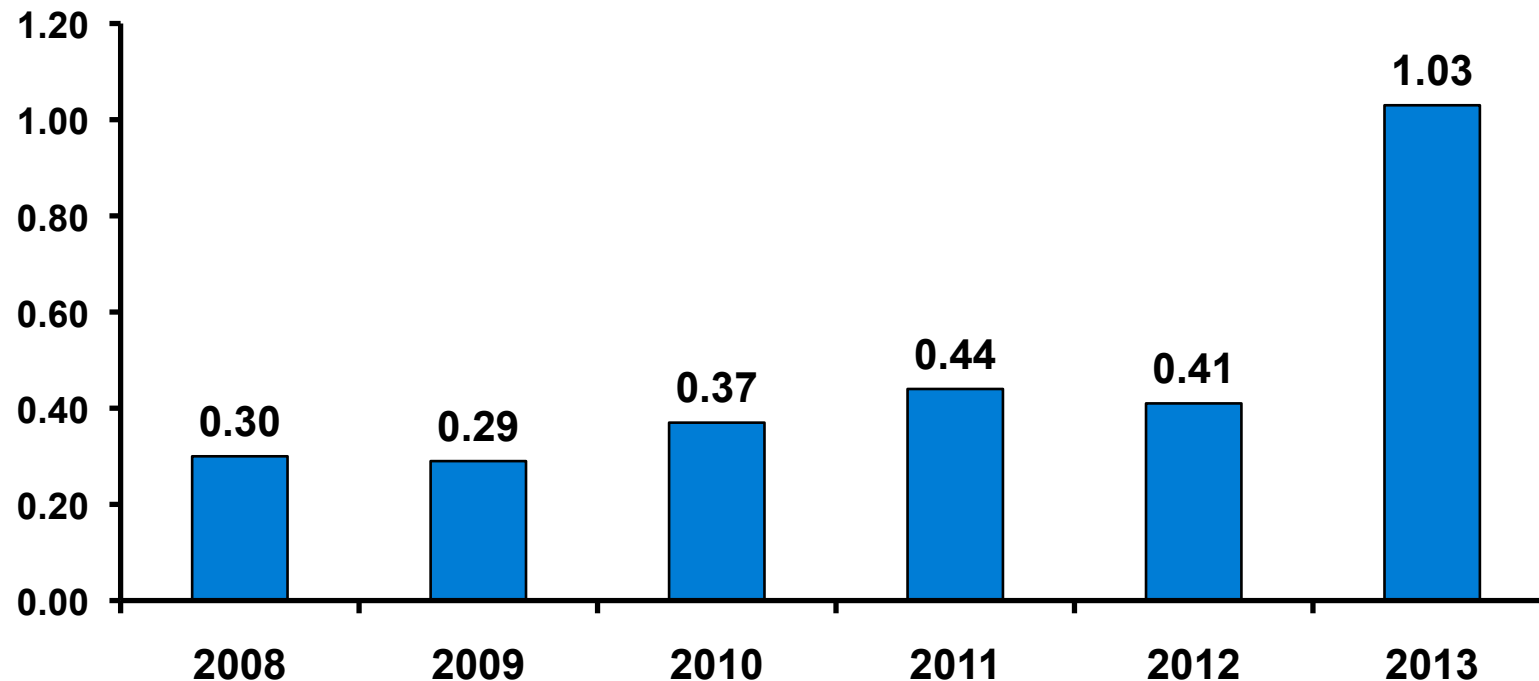
# Repeat Visitors Last Trip

n = 28



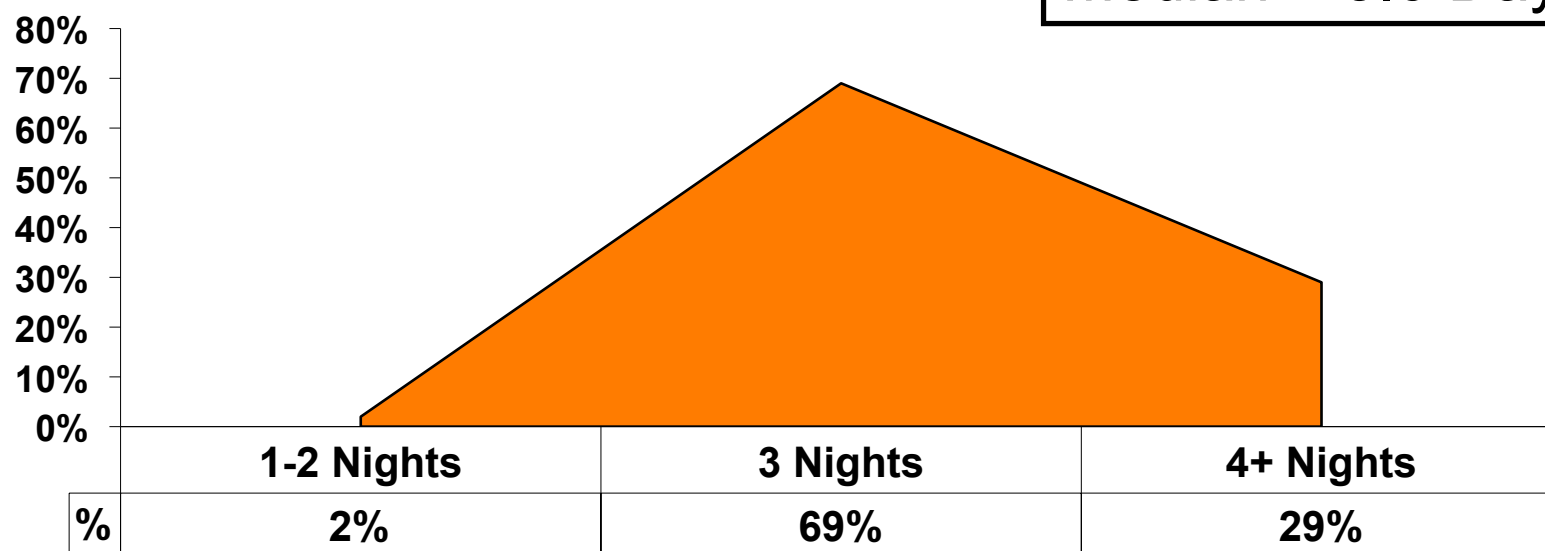
- The average repeat visitor has been to Guam 1.96 times.
- A little less than half the repeat visitors have been here within the last year.

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

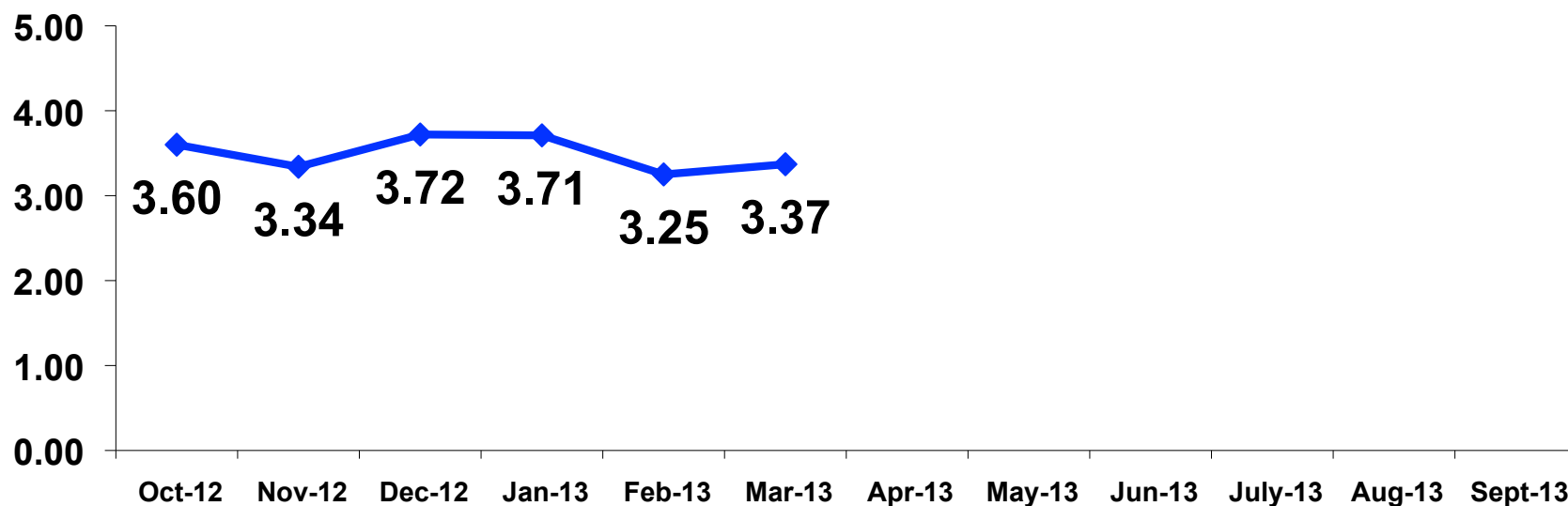


# Length of Stay

Mean = 3.37 Days  
Median = 3.0 Days



# Average Length of Stay

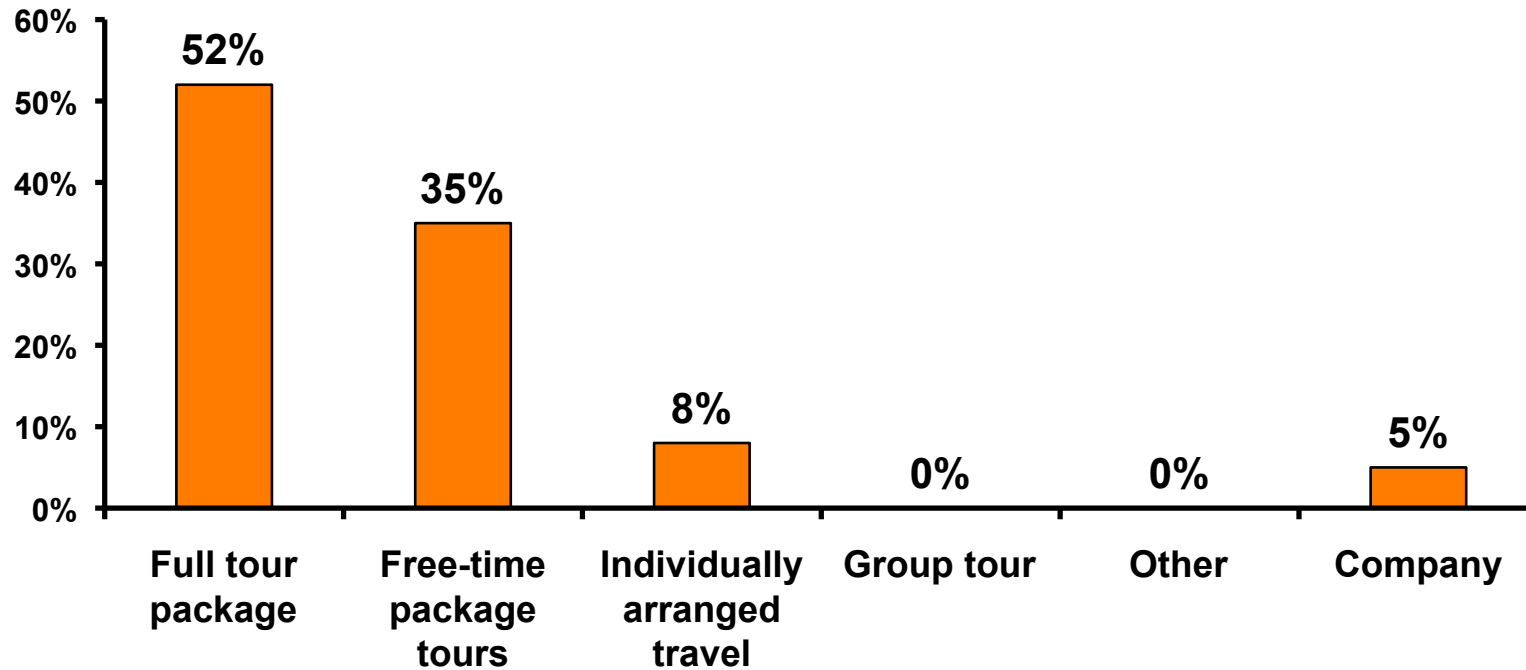


# Occupation by Income

		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	30%		33%	33%	36%	33%	24%	24%
	Housewife/ Homemaker	19%			19%	19%	16%	15%	23%
	Self-employed	14%		7%	4%	19%	16%	21%	12%
	Professional/ Specialist/ Tech	11%		20%	13%	9%	15%	12%	9%
	Professor/ Teacher/ After-school	5%		13%	4%	2%	2%	6%	9%
	Skilled worker	5%			6%	3%	5%	9%	3%
	Manager/ Admin	3%			2%	3%	4%	3%	6%
	Service worker/ Private hse worker	3%		13%	2%			3%	3%
	Unemployed	2%		7%	6%			3%	
	Govt- office worker non-mgr	2%		7%	6%				3%
	Sales worker/ Clerical	2%			2%	2%	4%	3%	2%
	Judicial	2%				2%			5%
	Freelancer	1%			2%	3%			
	Govt- Executive	1%			2%		4%	3%	
	Retired	1%					2%		
	Other	0%			2%				
	Student	0%				2%			
	Govt- Manager	0%							2%
	Total	Count	307	15	54	58	55	34	66
									4

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



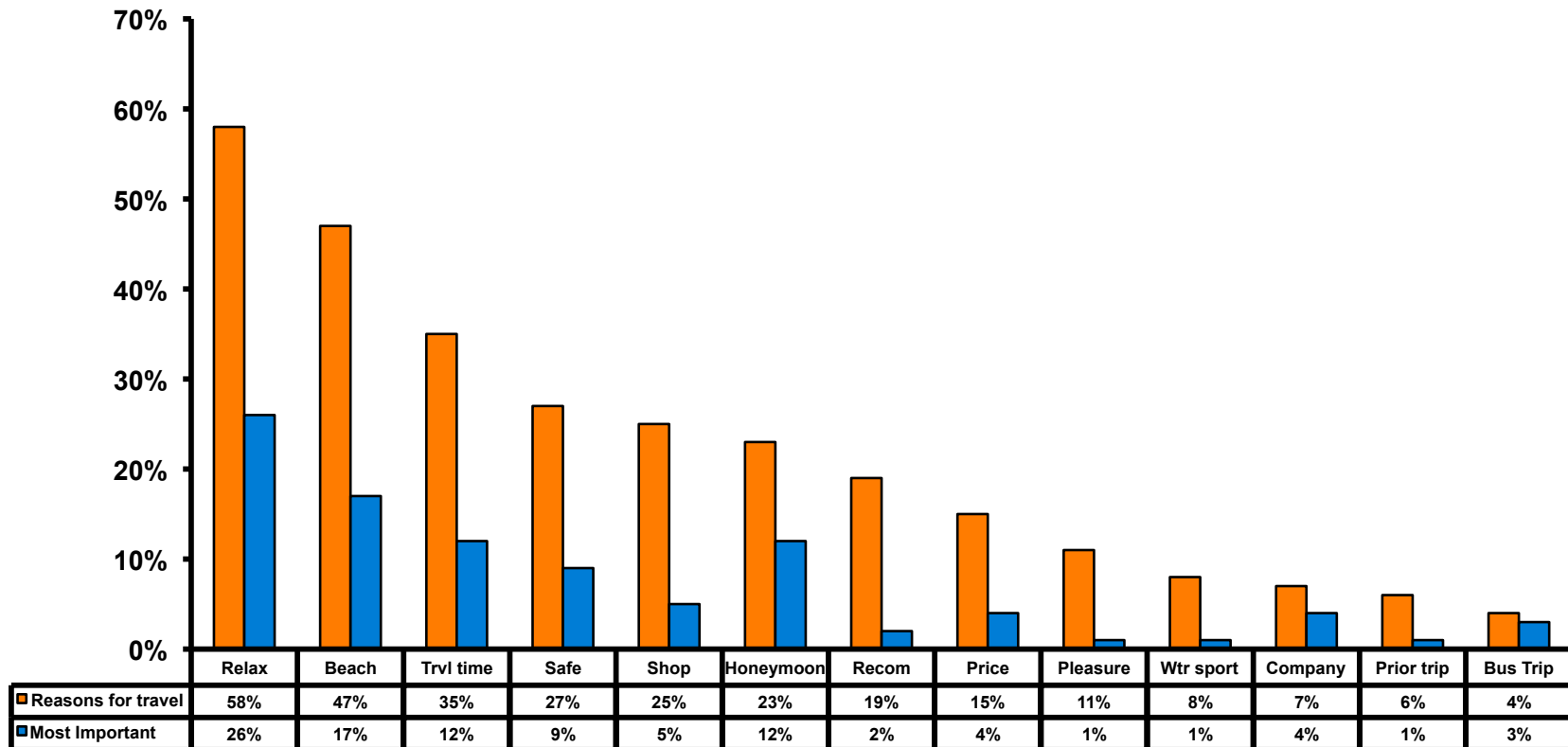
# Accommodation by Income

Average length of stay: 3.37 days

		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+
Q9	PIC Club	39%		13%	22%	47%	42%	75%	48%
	Hyatt Regency Guam	13%		20%	18%	12%	5%	6%	15%
	Sheraton Laguna Guam	11%		20%	5%	15%	9%	3%	6%
	Hotel Nikko Guam	7%			11%	8%	7%	6%	4%
	Leo Palace Resort	7%		27%	18%	5%	4%		4%
	Outrigger Guam Resort	5%			5%	5%	12%		6%
	Hilton Guam Resort	4%			5%	2%	9%	3%	4%
	Holiday Resort Guam	4%		13%	4%	2%	5%		4%
	Onward Beach Resort	3%			7%	2%	2%	3%	3%
	Westin Resort Guam	3%			4%	2%	5%	3%	3%
	Royal Orchid Guam	1%		7%					1%
	Hotel Santa Fe	0%						3%	
	Other	0%							
	Home stay/ friend/ relative	0%							
	Apartment	0%				2%			
	Condo	0%							
	Total	Count	350	15	55	60	57	36	67
									No Income
									25%
									50%
									25%
									4



# Travel Motivation - Top Responses



# **Most Important Reason for Choosing Guam**

- Relaxation,
- Guam's natural beauty/ beaches
- Honeymoon

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	58%	30%	55%	67%	65%	54%	62%
	Natural beauty	47%	50%	44%	51%	59%	42%	52%
	Short travel time	35%	30%	35%	38%	18%	22%	48%
	Safe	27%	20%	26%	32%	24%	23%	30%
	Shopping	25%	20%	23%	31%	6%	23%	26%
	Honeymoon	23%	50%	30%	11%		27%	19%
	Recomm- friend/family/trvl agnt	19%	40%	14%	25%	29%	18%	20%
	Price	15%	20%	17%	13%	6%	12%	18%
	Pleasure	11%	10%	9%	15%	12%	9%	13%
	Water sports	8%		6%	11%	6%	8%	7%
	Company Sponsored	7%	20%	8%	4%		10%	3%
	Previous trip	6%		2%	13%	6%	6%	6%
	Company/ Business Trip	4%	10%	2%	6%	12%	6%	2%
	Visit friends/ Relatives	3%		3%	2%	12%	2%	5%
	Scuba	2%		2%	1%	12%	3%	2%
	Organized sports	1%		1%	1%	6%	2%	1%
	Golf	1%		0%	1%	6%	1%	1%
	Other	1%		0%				1%
	Married/ Attn wedding	0%		0%			1%	
	Career Cert/ Testing	0%				6%	1%	
Convention/ Trade/ Conference	0%				6%	1%		
Total	Count	346	10	208	106	17	171	174

# 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	58%		27%	45%	67%	63%	64%	67%	75%
	Natural beauty	47%		40%	36%	42%	53%	44%	59%	50%
	Short travel time	35%		27%	29%	33%	26%	36%	48%	50%
	Safe	27%		7%	20%	32%	25%	33%	38%	75%
	Shopping	25%		27%	27%	27%	25%	17%	30%	25%
	Honeymoon	23%		40%	36%	25%	26%	28%	3%	75%
	Recomm- friend/family/trvl agnt	19%		27%	15%	27%	18%	14%	14%	25%
	Price	15%		7%	16%	20%	9%	11%	17%	25%
	Pleasure	11%		20%	4%	10%	9%	11%	14%	25%
	Water sports	8%		7%	7%	5%	5%	11%	14%	
	Company Sponsored	7%		27%	18%	5%	2%		3%	
	Previous trip	6%				3%	11%	11%	9%	
	Company/ Business Trip	4%			4%	7%	2%	8%		
	Visit friends/ Relatives	3%		7%			5%		6%	
	Scuba	2%			5%		4%		2%	
	Organized sports	1%			2%	2%	2%			
	Golf	1%						3%		
	Other	1%			2%				2%	
	Married/ Attn wedding	0%			2%					
	Career Cert/ Testing	0%					2%			
Convention/ Trade/ Conference	0%					2%				
Total	Count	346		15	55	60	57	36	64	4

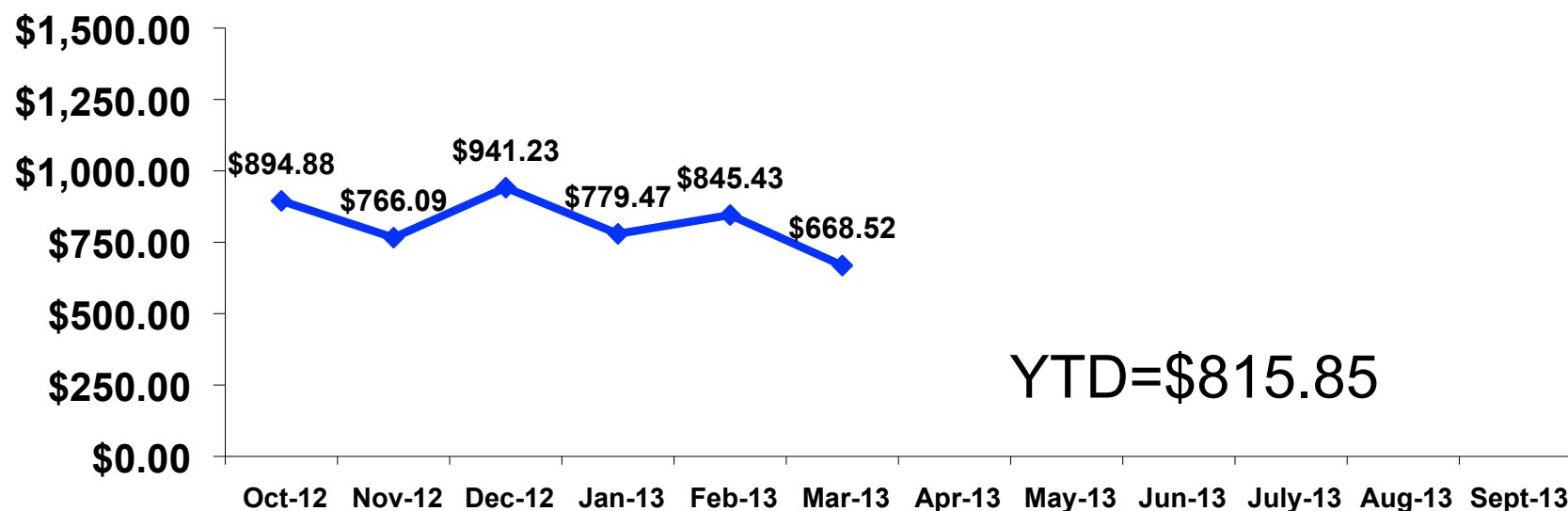
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

KW 1,103.61/US\$1

- \$1,590.17 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,061 = maximum (highest amount recorded for the entire sample)
- \$668.52 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



# Breakdown of Prepaid Expenditures

## KW 1,103.61=\$1

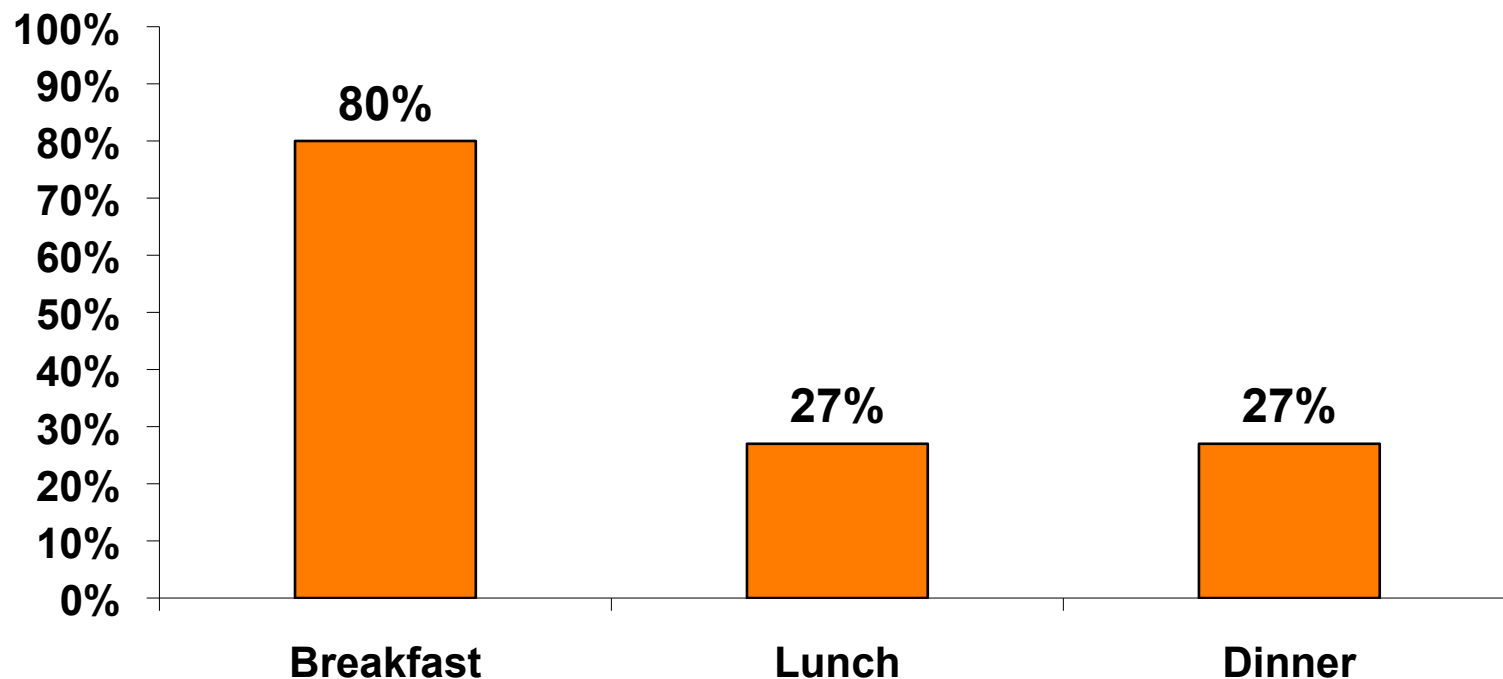
(Filter: Only those who responded/  
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,800.25
Air & Accommodation w/ daily meal package	\$2,168.90
Air only	\$1,143.04
Accommodation only	\$-
Accommodation w/ daily meal only	\$857.28
Food & Beverages in Hotel	\$194.82
Ground transportation - Korea	\$111.75
Ground transportation - Guam	\$477.98
Optional tours/ activities	\$235.59
Other expenses	\$415.62
Total Prepaid	\$1,590.17



# Prepaid Meal Breakdown

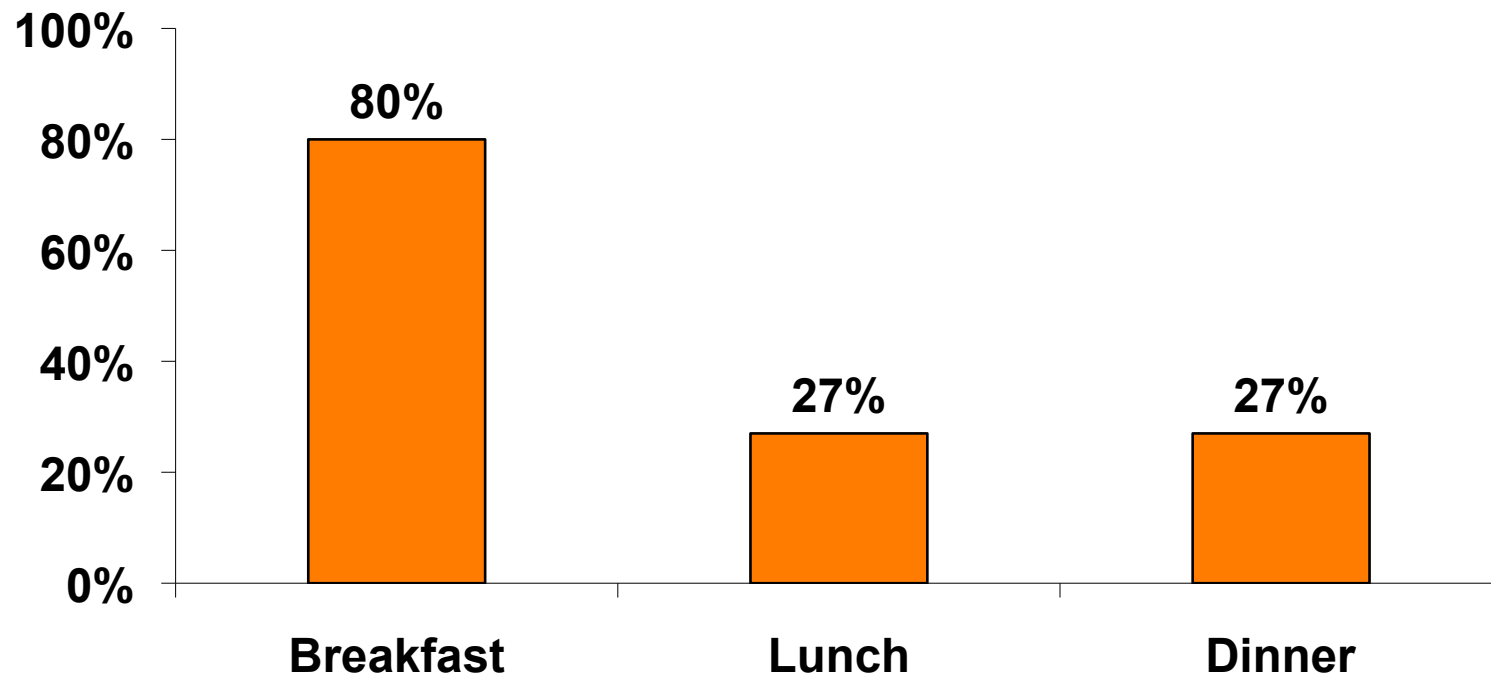
Air/ Accommodations with Daily Meal Package  
n=15



Mean=\$2,168.90 per travel party

# Prepaid Meal Breakdown

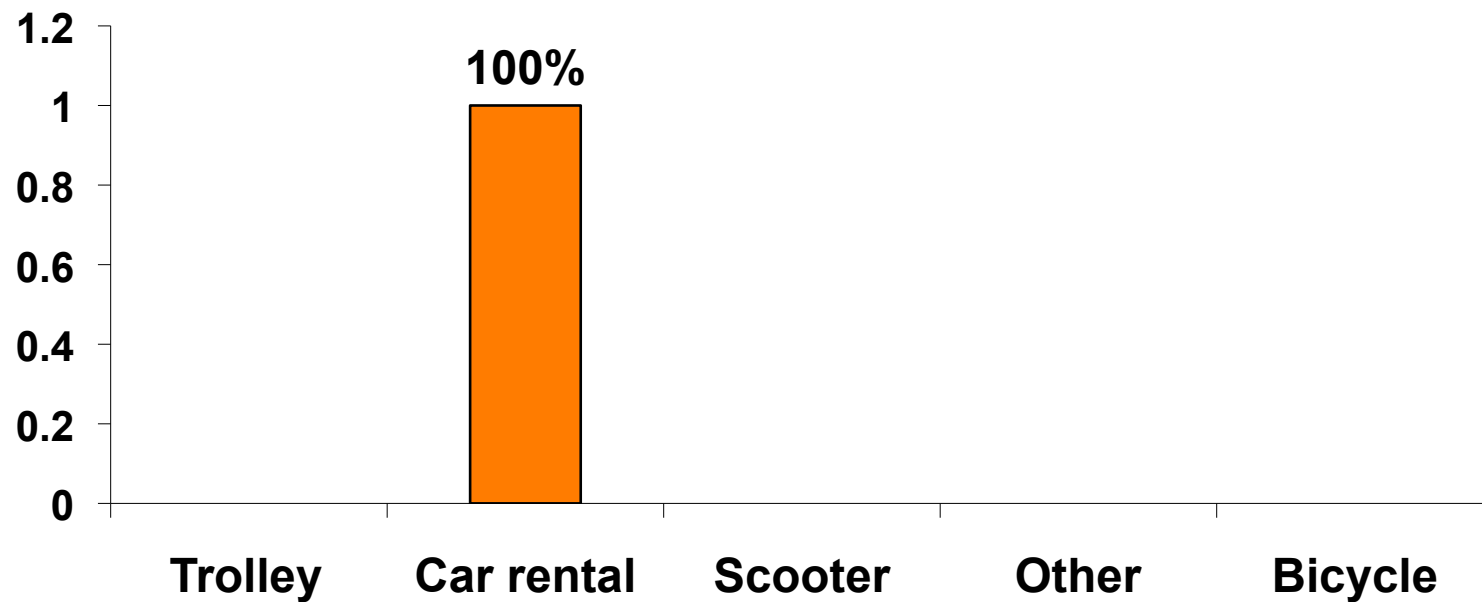
Accommodations with Daily Meal Package  
n=15



Mean=\$857.28 per travel party

## Prepaid Ground Transportation

n=3

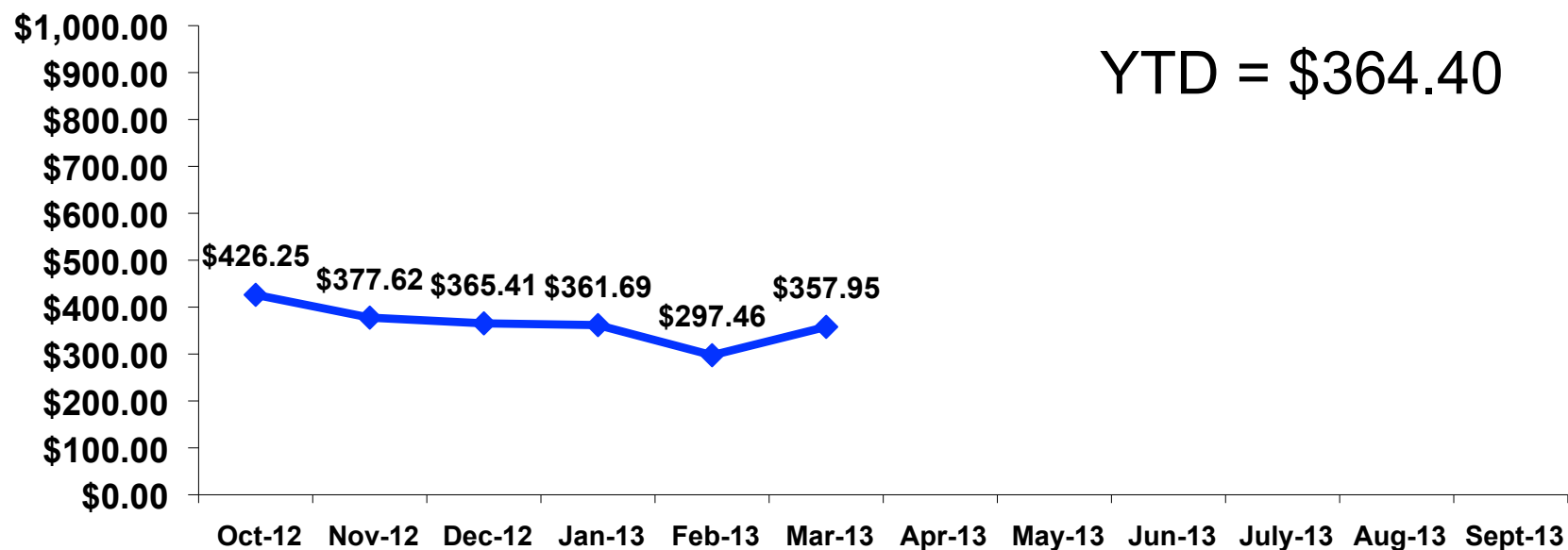


Mean=\$477.98 per travel party

# On-Island Expenditures

- \$831.72 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$15,000 = Maximum (highest amount recorded for the entire sample)
- \$357.95 = overall mean average per person on-island expenditure

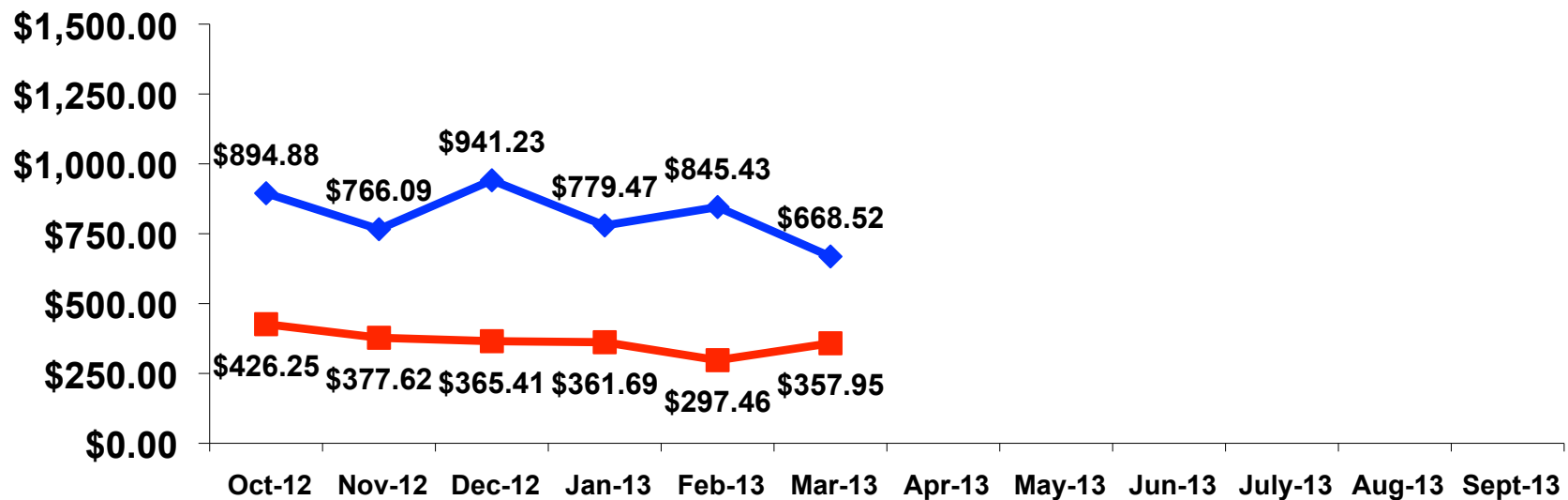
# On-Island Expenditures Per Person



# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$815.85

On-Island YTD = \$364.40



◆ Prepaid    ■ On-isle

# 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	\$357.95	\$371.67	\$341.91	\$113.75	\$433.88	\$303.21	\$340.00	\$385.00	\$330.95	\$300.11	\$668.28
	Median	\$250	\$250	\$236	\$103	\$300	\$230	\$188	\$310	\$250	\$175	\$91
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$150	\$0	\$0	\$0
	Maximum	\$2,775	\$2,775	\$2,775	\$250	\$2,775	\$2,000	\$1,050	\$750	\$1,500	\$1,600	\$2,775

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$42.77	\$48.01	\$37.78	\$7.10	\$36.95	\$35.25	\$123.06
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$38.57	\$43.47	\$33.31	\$3.00	\$31.40	\$37.94	\$131.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$64.93	\$46.81	\$79.99	\$6.50	\$48.87	\$49.26	\$370.61
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$73.81	\$78.37	\$69.39	\$13.00	\$67.01	\$86.70	\$112.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$208.89	\$235.66	\$170.74	\$24.00	\$217.91	\$201.69	\$295.56
	Median	\$0	\$0	\$0	\$0	\$0	\$40	\$0
GIFT- OTHER	Mean	\$110.17	\$107.79	\$113.19	\$12.00	\$130.52	\$90.49	\$52.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$42.62	\$46.89	\$37.93	\$6.00	\$37.62	\$49.71	\$80.39
	Median	\$0	\$0	\$0	\$0	\$0	\$24	\$0
OTHER	Mean	\$253.23	\$193.10	\$314.80	\$389.40	\$234.78	\$260.95	\$310.00
	Median	\$10	\$0	\$40	\$130	\$10	\$18	\$0
TOTAL	Mean	\$831.72	\$797.08	\$853.59	\$461.00	\$801.75	\$807.75	\$1,475.72
	Median	\$500	\$500	\$500	\$275	\$501	\$500	\$275



# On-Island Expenditures

## First Timers & Repeaters

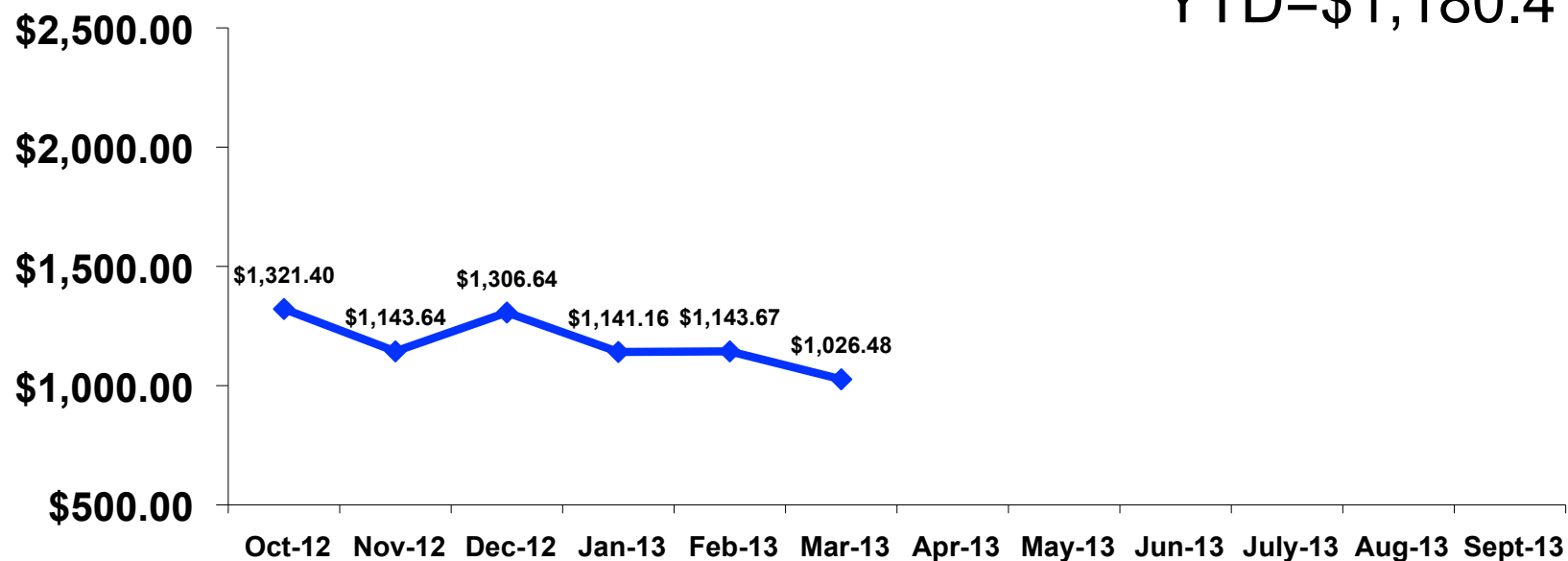
		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$42.77	\$37.34	\$106.79
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$38.57	\$36.48	\$63.93
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$64.93	\$63.57	\$82.86
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$73.81	\$75.50	\$57.04
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$208.89	\$207.28	\$234.89
	Median	\$0	\$0	\$120
GIFT- OTHER	Mean	\$110.17	\$111.40	\$100.00
	Median	\$0	\$0	\$0
TRANS	Mean	\$42.62	\$40.43	\$69.36
	Median	\$0	\$0	\$4
OTHER	Mean	\$253.23	\$244.73	\$359.96
	Median	\$10	\$10	\$28
TOTAL	Mean	\$831.72	\$813.16	\$1,074.82
	Median	\$500	\$500	\$1,000

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

- \$1,026.48 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,812 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person

YTD=\$1,180.41

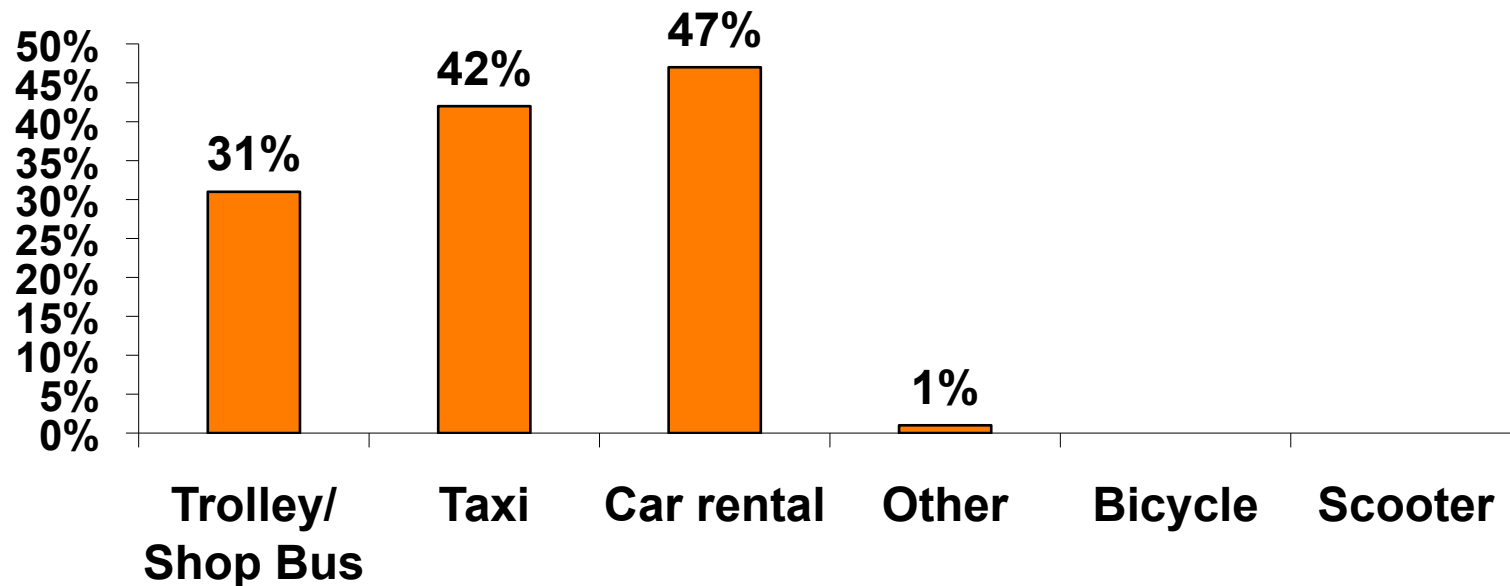


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$42.77
Food & beverage in fast food restaurant/ convenience store	\$38.57
Food & beverage at restaurants or drinking establishments outside a hotel	\$64.93
Optional tours and activities	\$73.81
Gifts/ souvenirs for yourself/companions	\$208.89
Gifts/ souvenirs for friends/family at home	\$110.17
Local transportation	\$42.62
Other expenses not covered	\$253.23
<b>Average Total</b>	<b>\$831.72</b>

# Local Transportation

n=159



Mean=\$42.62 per travel party

# Guam Airport Expenditures

- \$60.38 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,500 = Maximum (highest amount recorded for the entire sample)

# Breakdown of Airport Expenditures

	MEAN \$
<b>Food &amp; Beverages</b>	\$6.89
<b>Gifts/Souvenirs Self</b>	\$26.84
<b>Gifts/Souvenirs Others</b>	\$26.65
<b>Total</b>	<b>\$60.38</b>

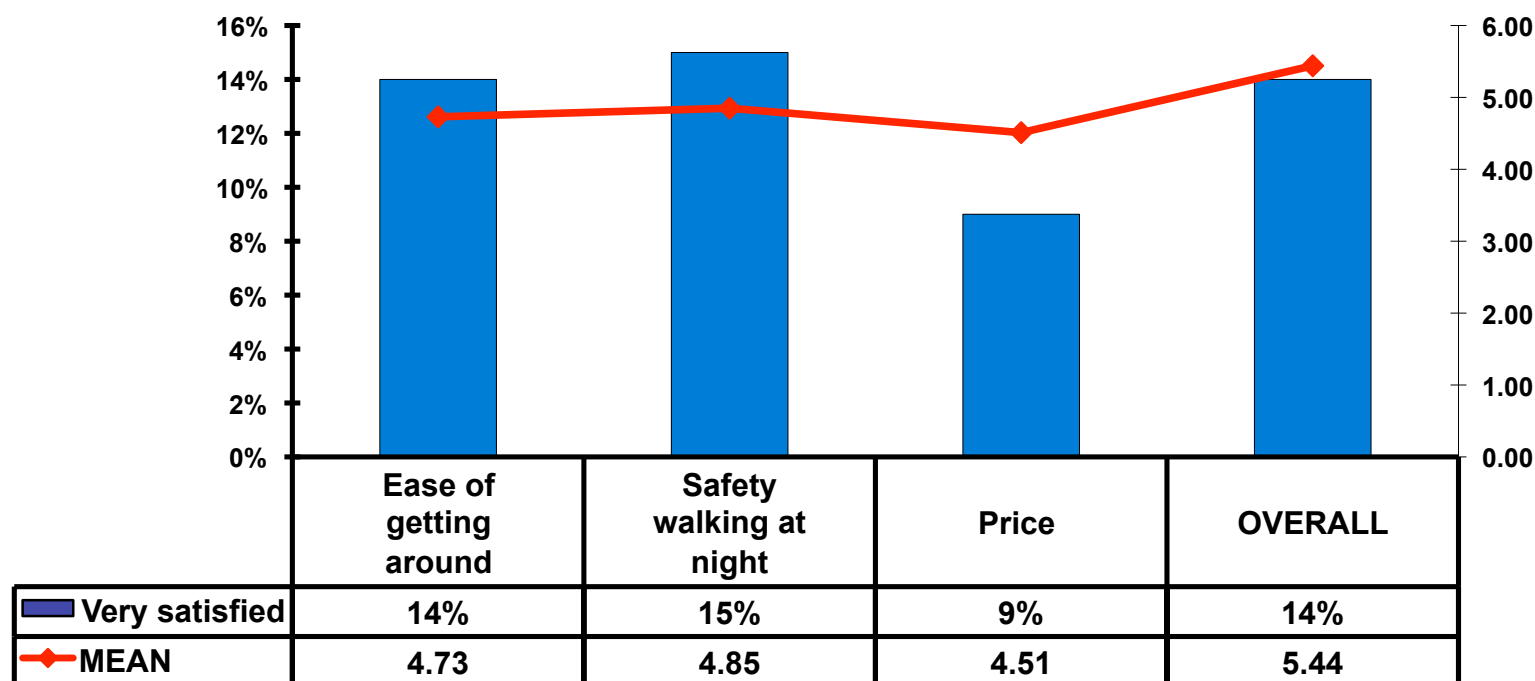
# SECTION 4 **VISITOR SATISFACTION**



# Satisfaction Scores Overall

7pt Rating Scale

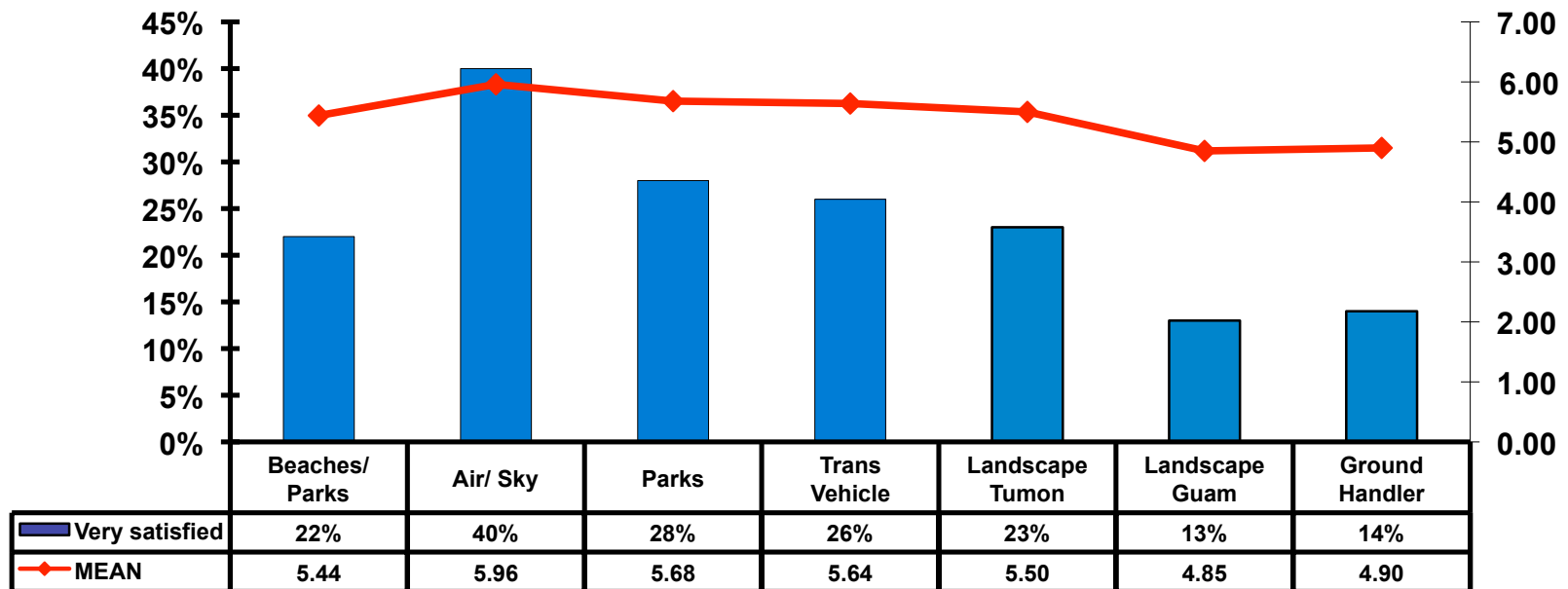
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

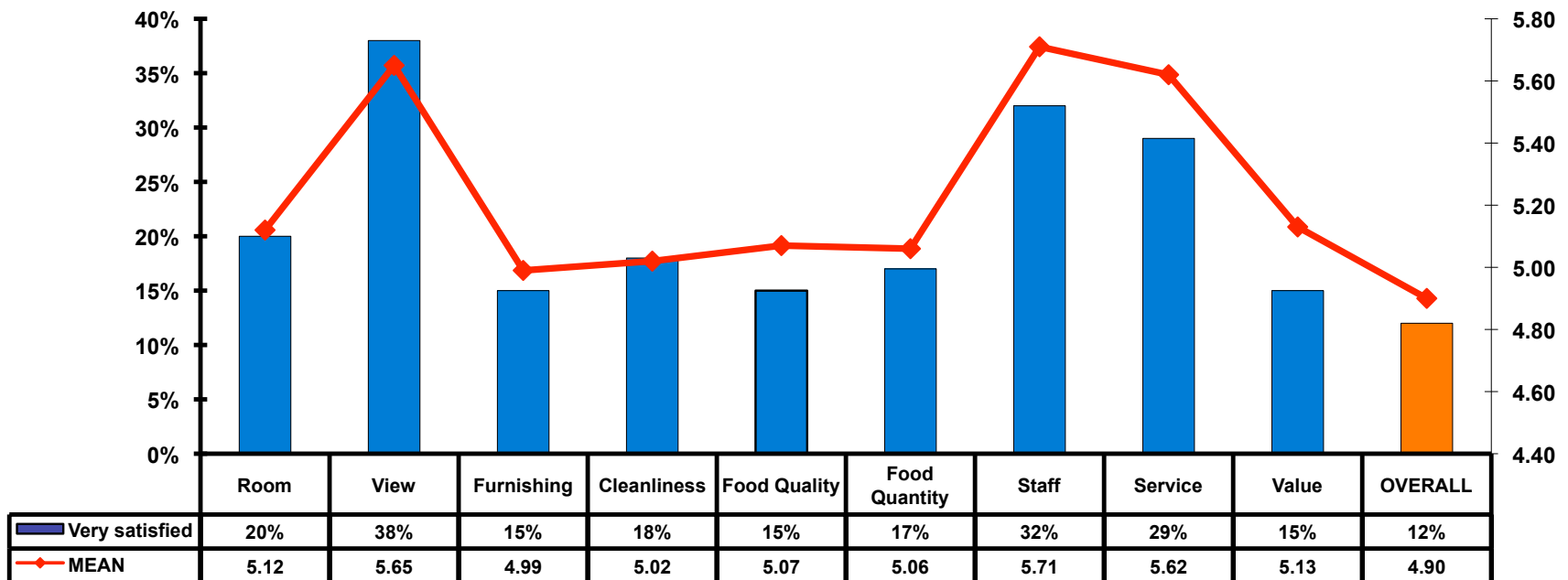
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

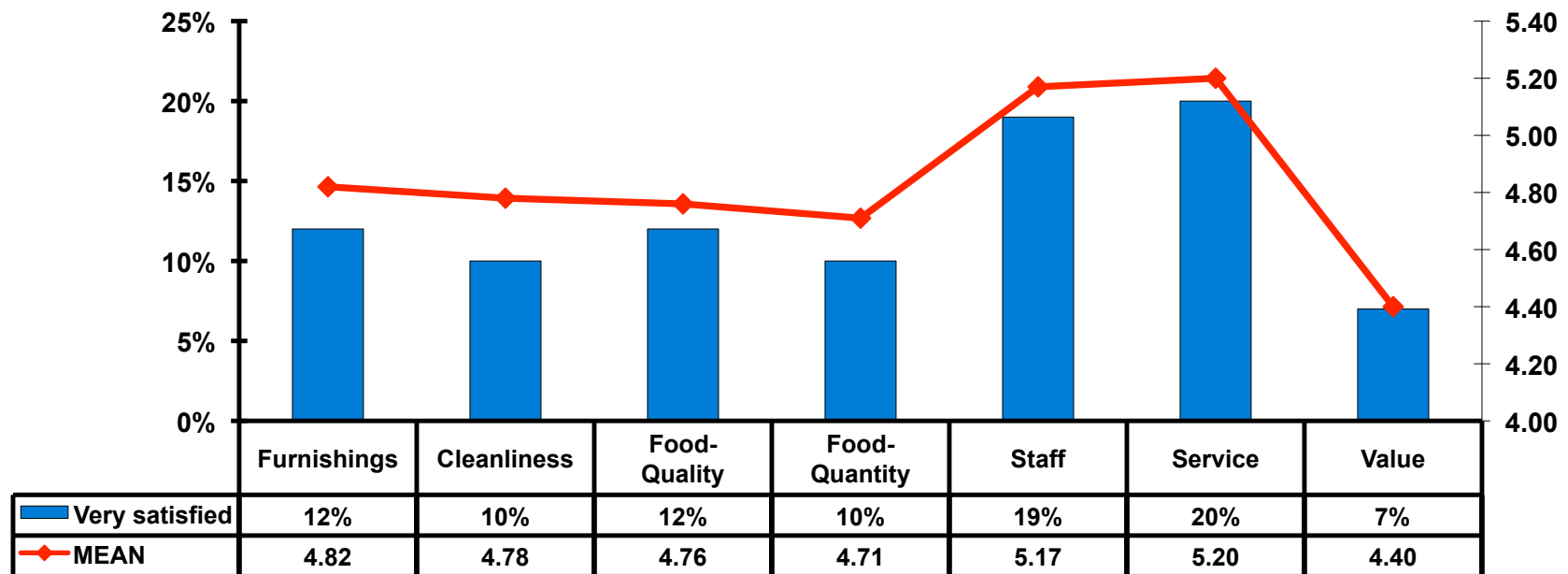
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

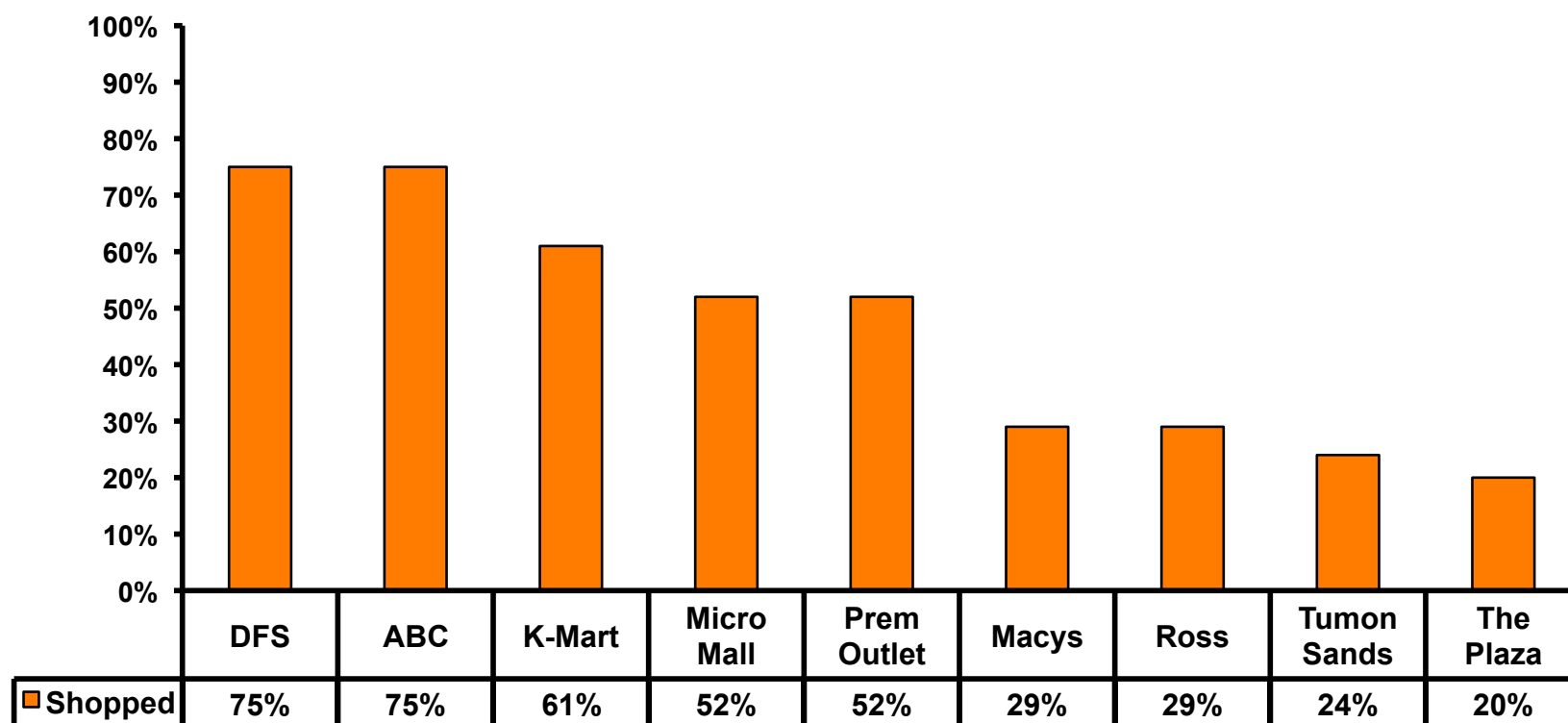
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

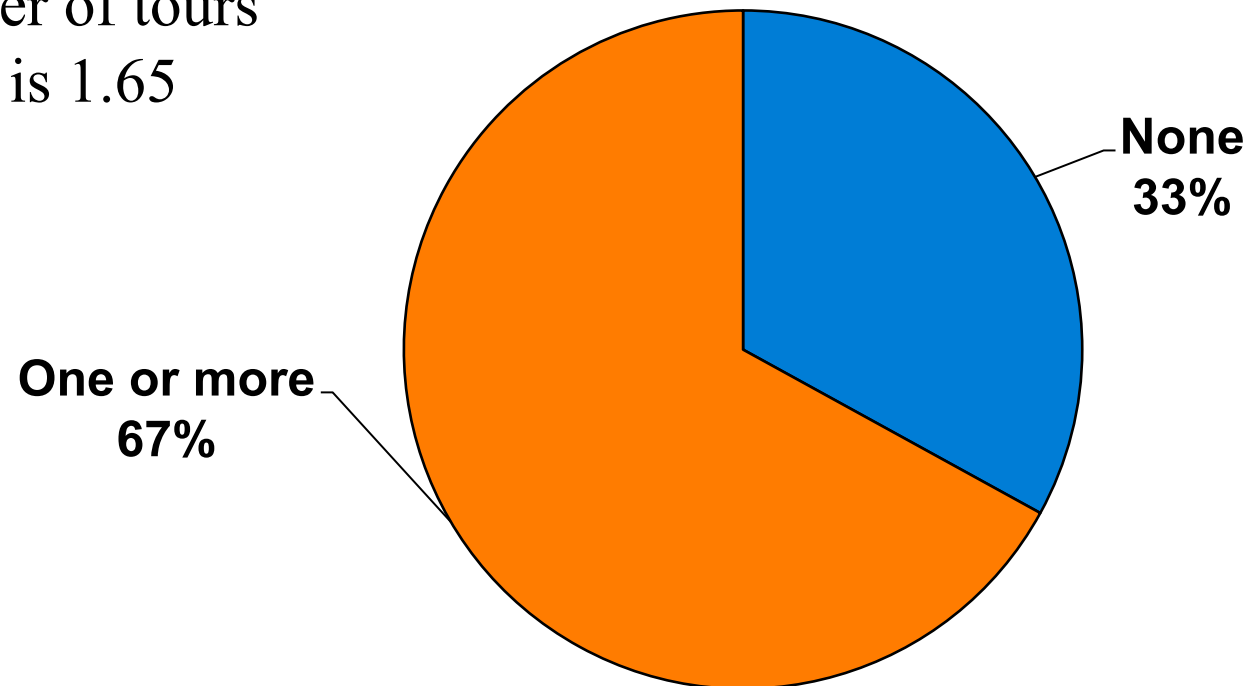
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>42%</b>	Score of 6 to 7 = <b>38%</b>
Score of 4 to 5 = <b>47%</b>	Score of 4 to 5 = <b>50%</b>
Score 1 to 3 = <b>12%</b>	Score 1 to 3 = <b>12%</b>
<b>MEAN = 5.03</b>	<b>MEAN = 4.86</b>

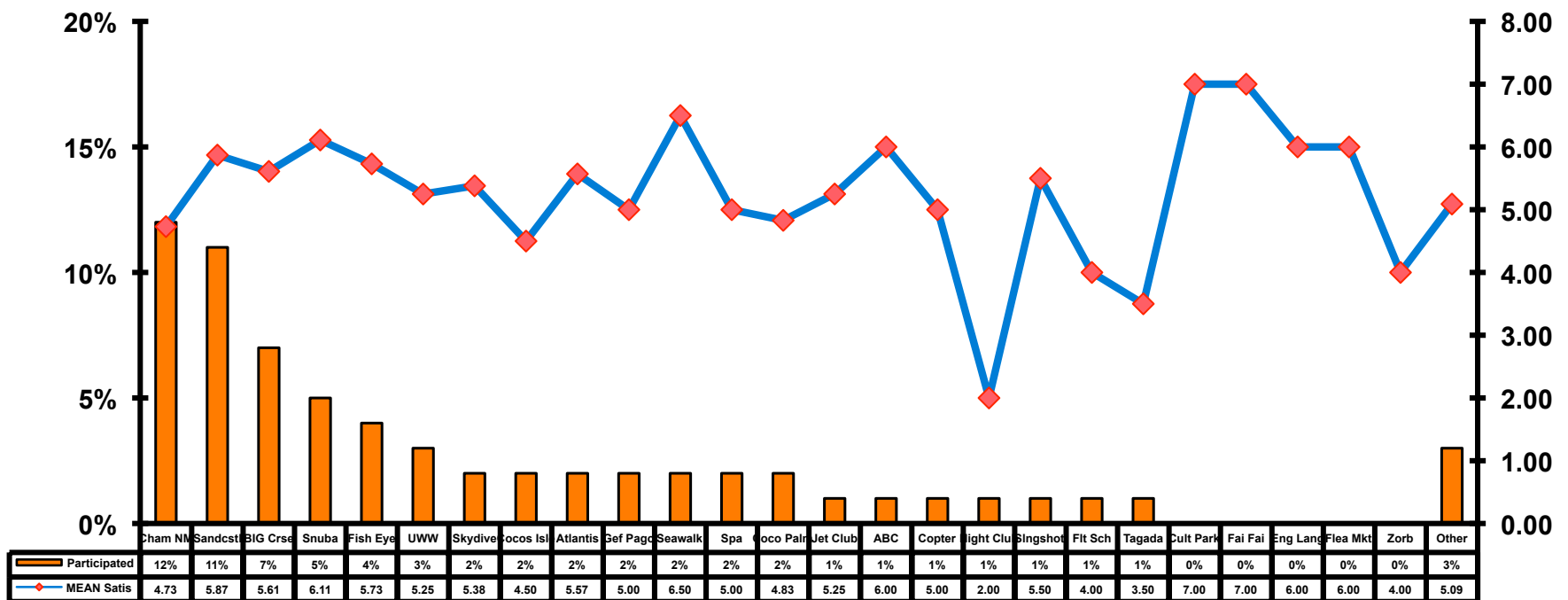
# Optional Tour Participation

- Average number of tours participated in is 1.65



# 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>32%</b>	Score of 6 to 7 = <b>26%</b>
Score of 4 to 5 = <b>60%</b>	Score of 4 to 5 = <b>63%</b>
Score 1 to 3 = <b>9%</b>	Score 1 to 3 = <b>12%</b>
<b>MEAN = 4.86</b>	<b>MEAN = 4.65</b>

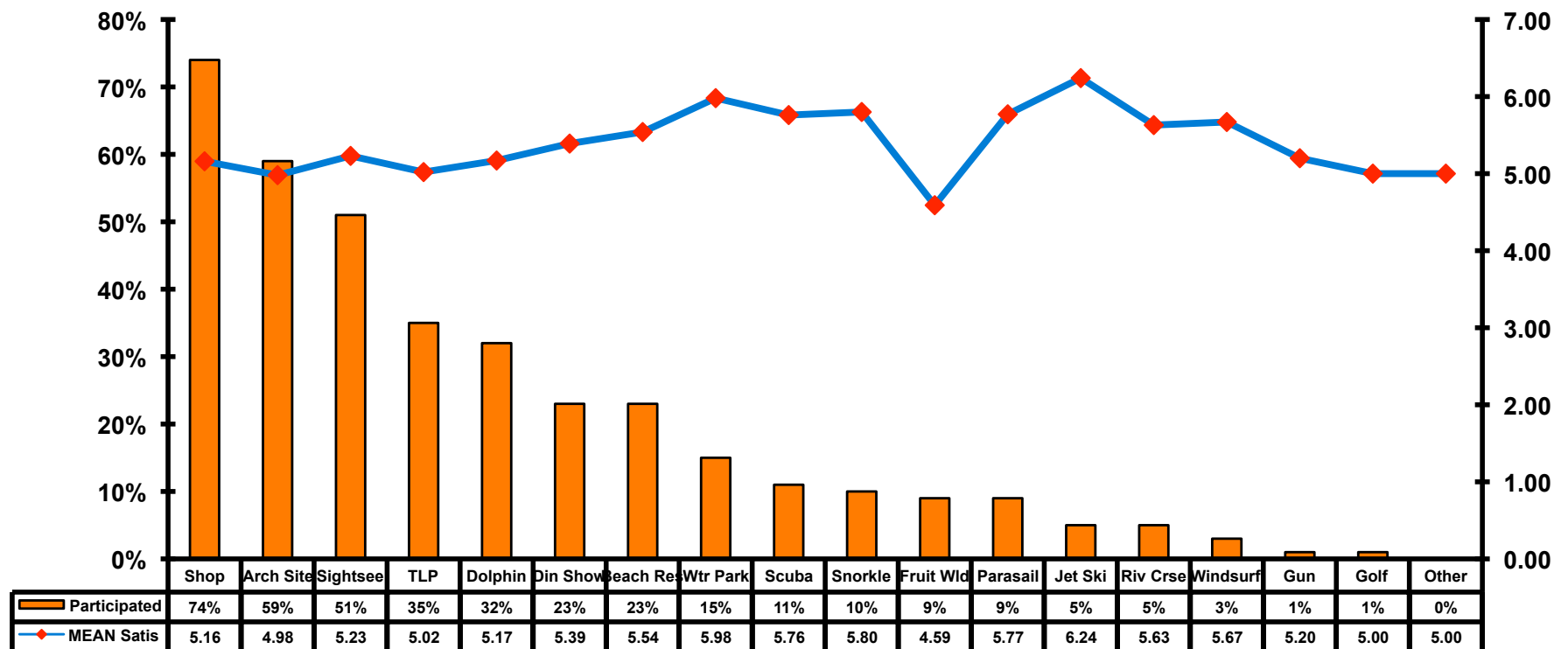
# Night Tours Satisfaction

**7pt Rating Scale**

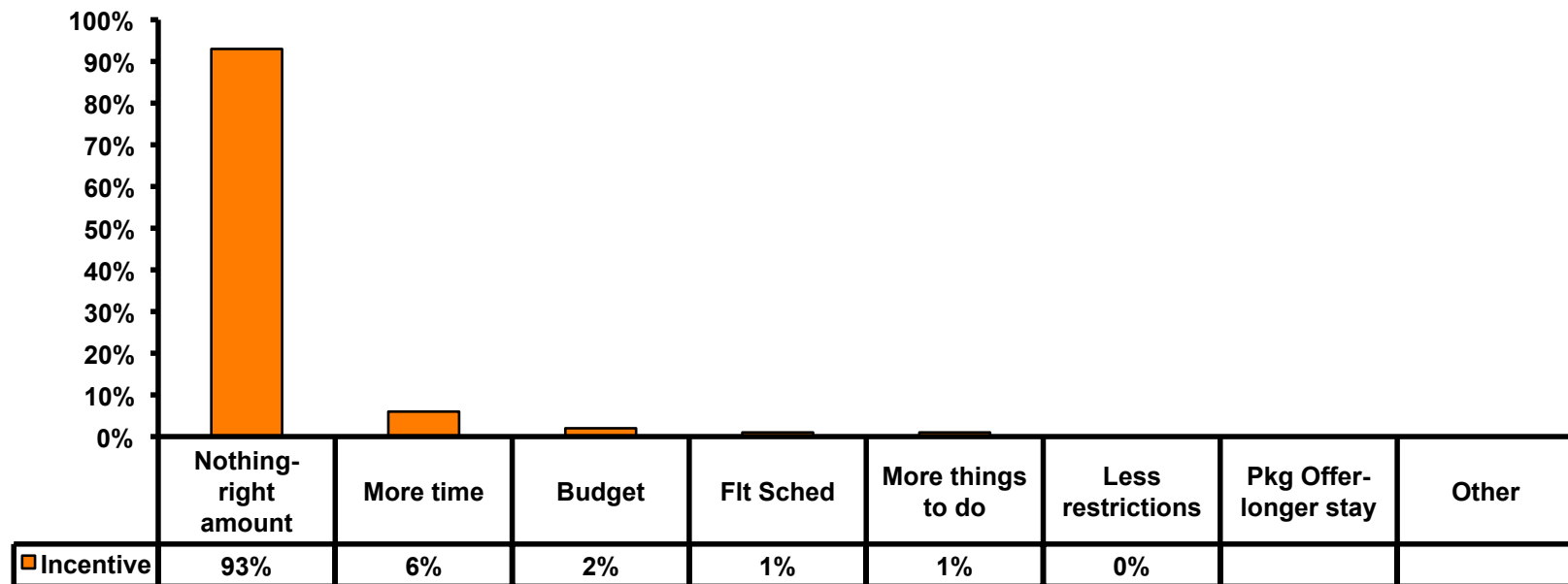
**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>21%</b>	Score of 6 to 7 = <b>20%</b>
Score of 4 to 5 = <b>66%</b>	Score of 4 to 5 = <b>64%</b>
Score 1 to 3 = <b>13%</b>	Score 1 to 3 = <b>17%</b>
<b>MEAN = 4.44</b>	<b>MEAN = 4.40</b>

# Satisfaction with Other Activities



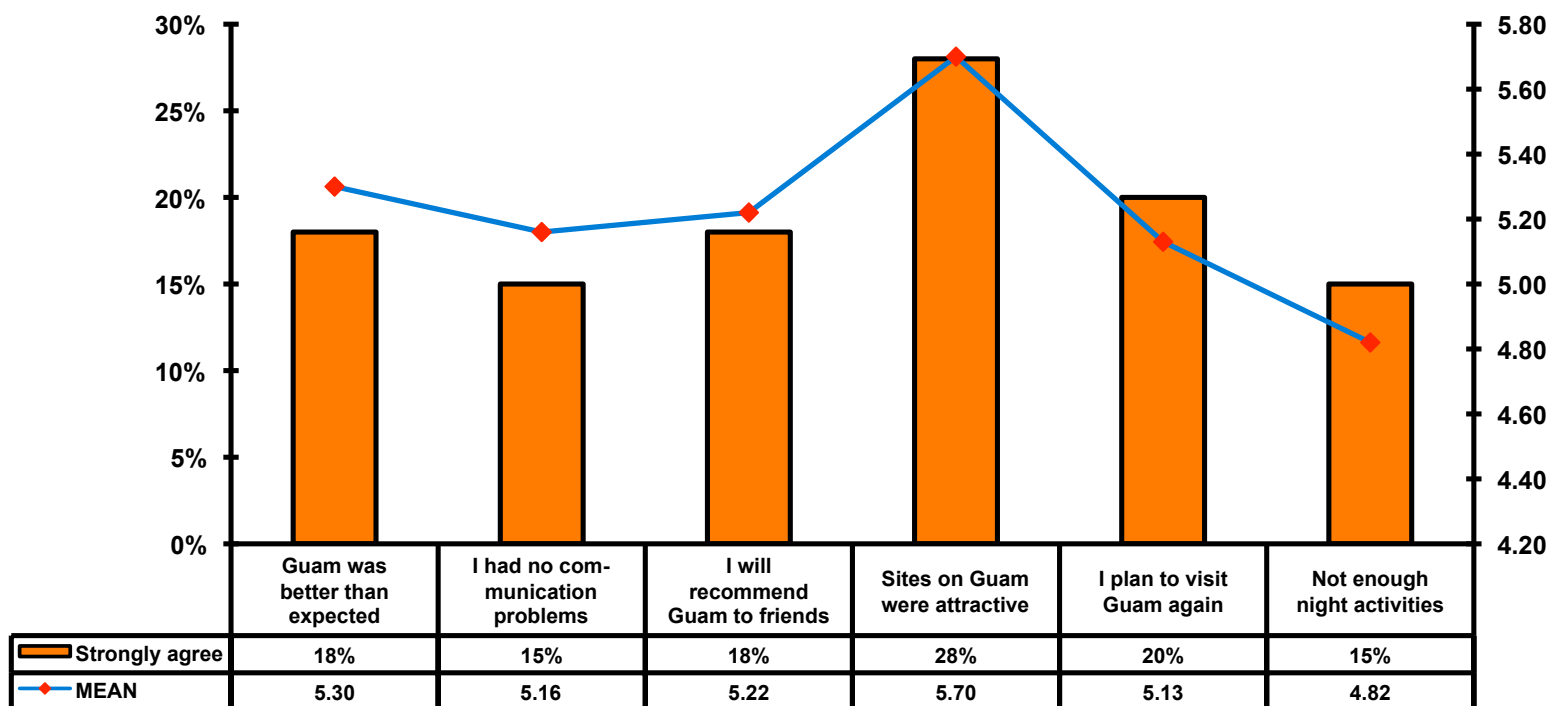
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

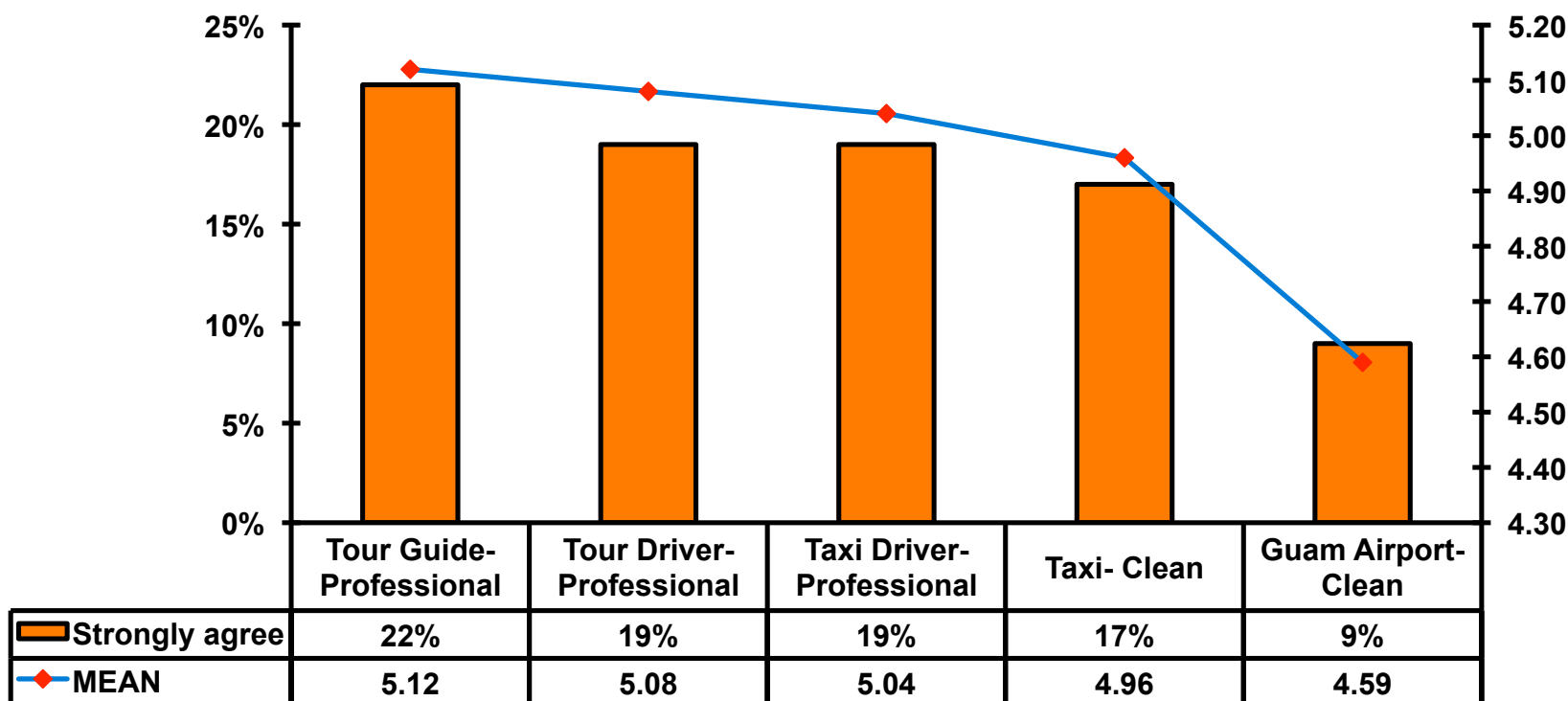
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

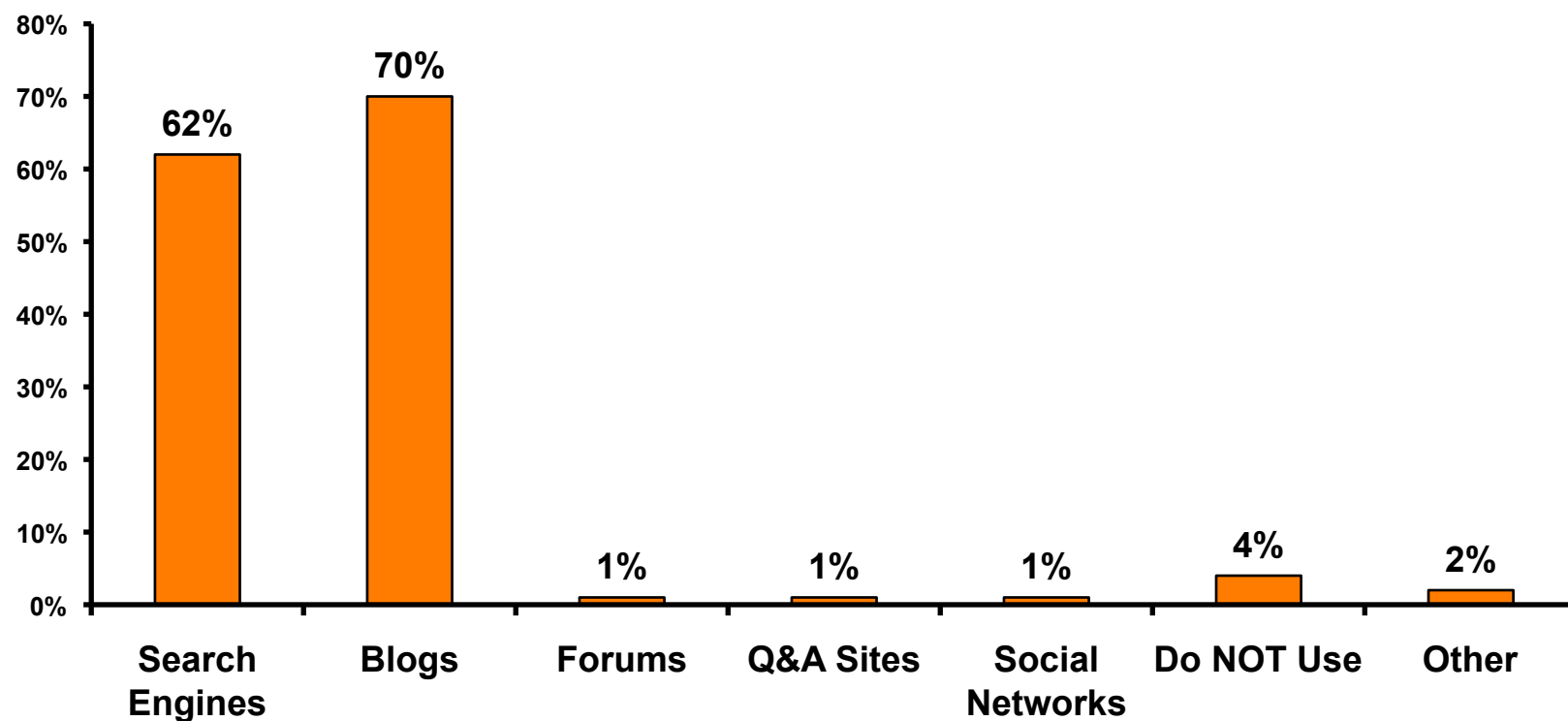
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

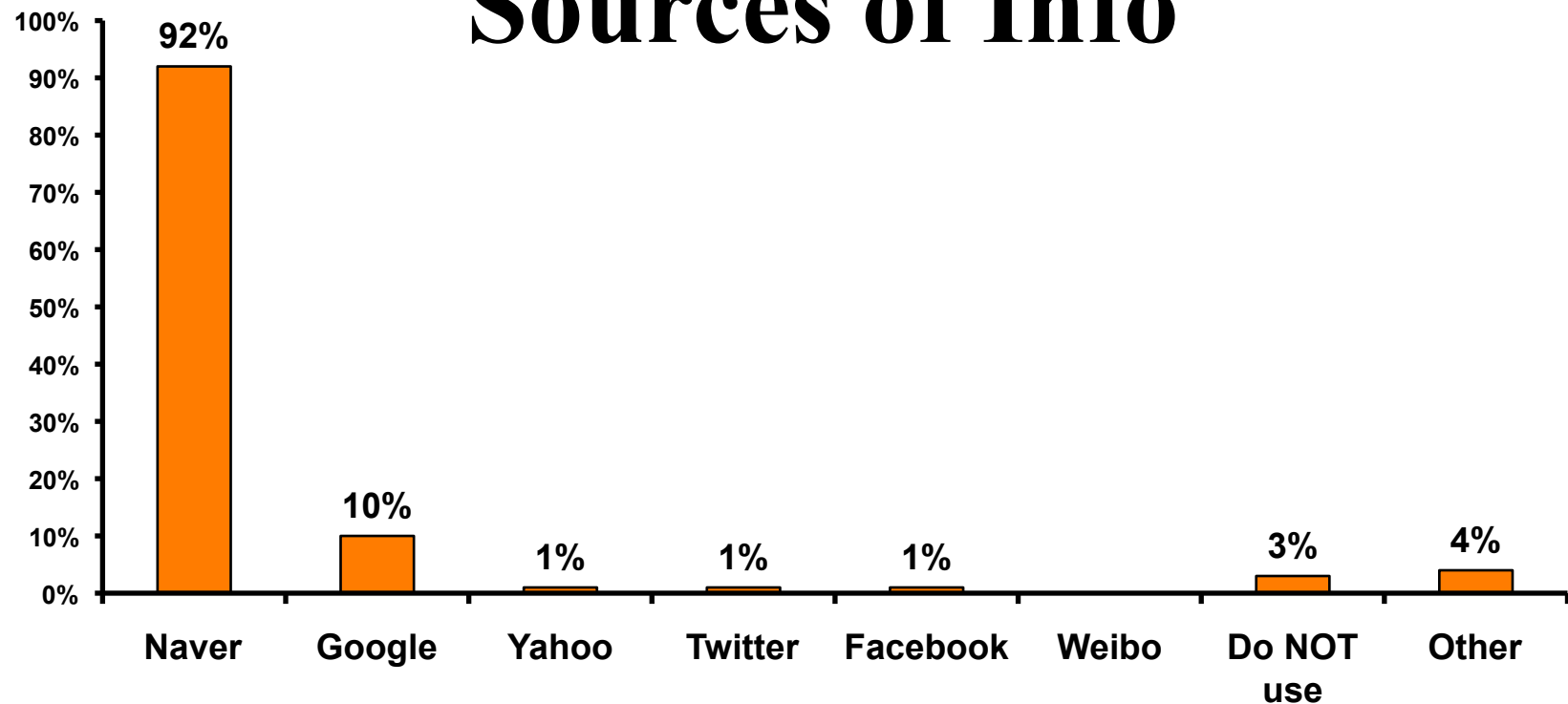
# Internet- Guam Sources of Info



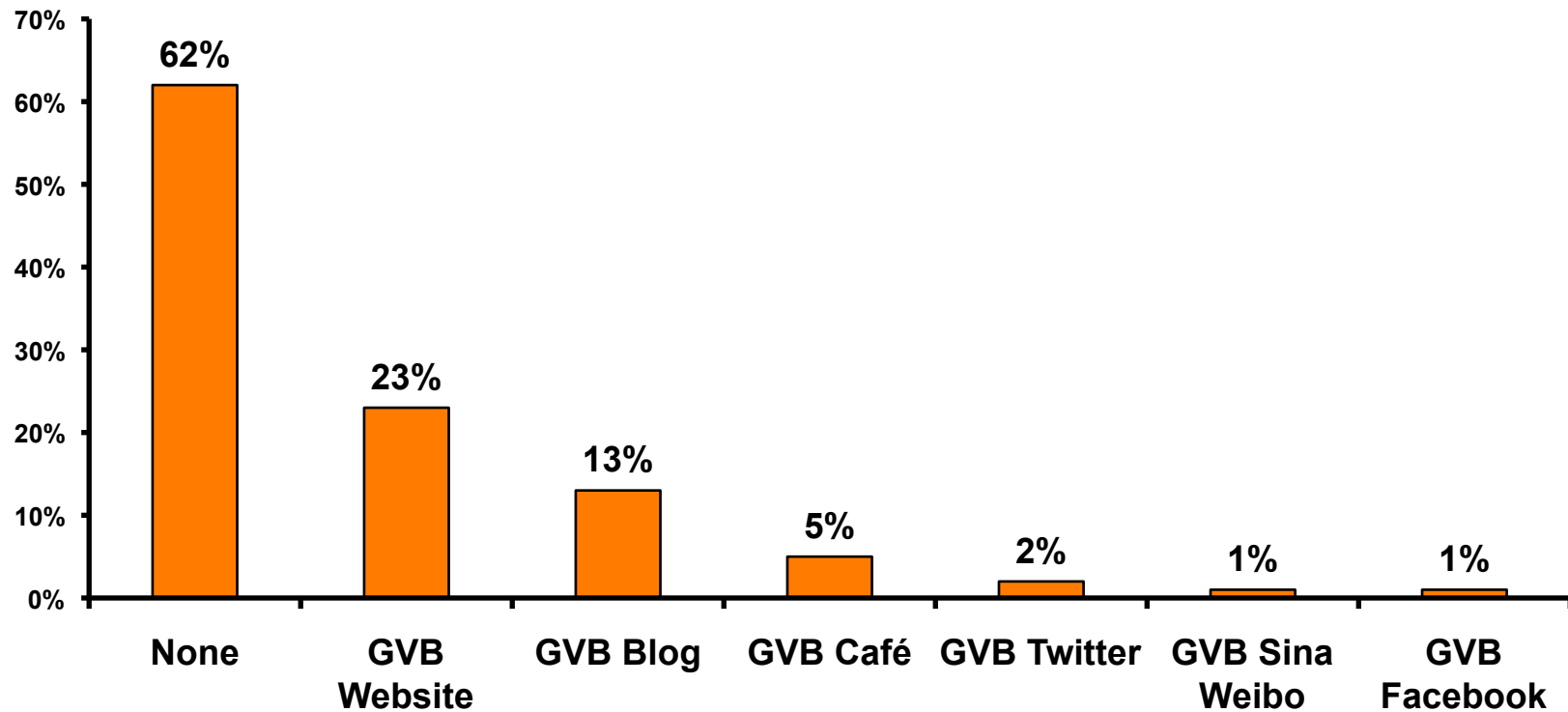


# Internet- Things To Do

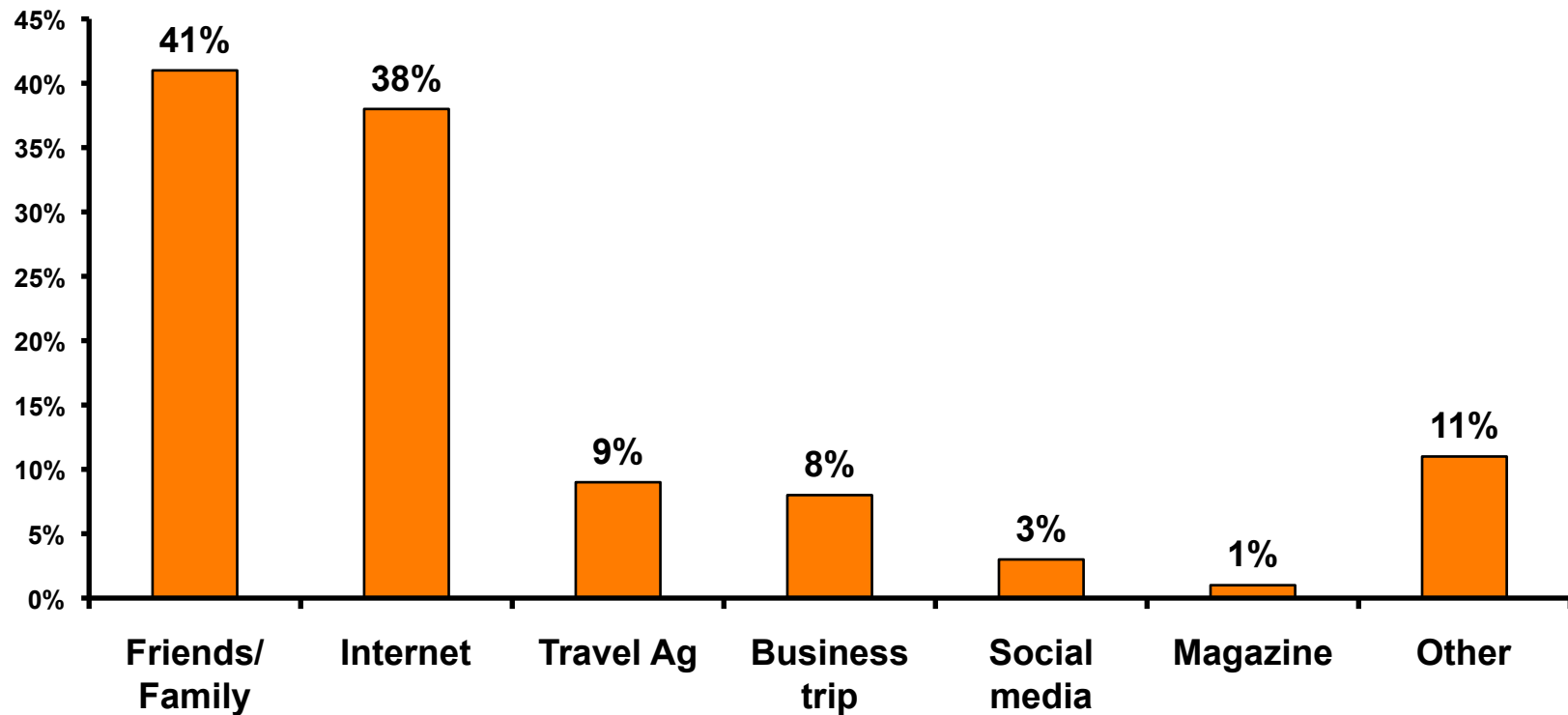
## Sources of Info



# Internet- GVB Sources

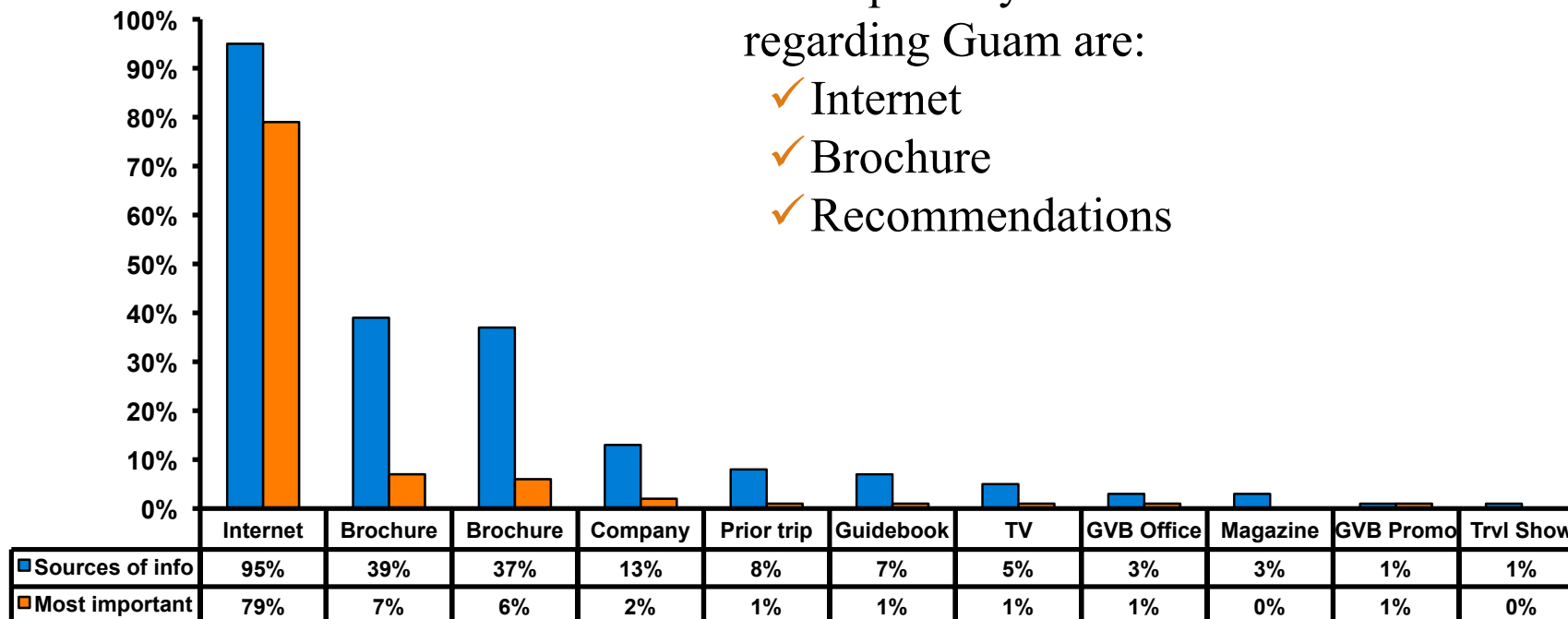


# Travel Motivation- Info Sources



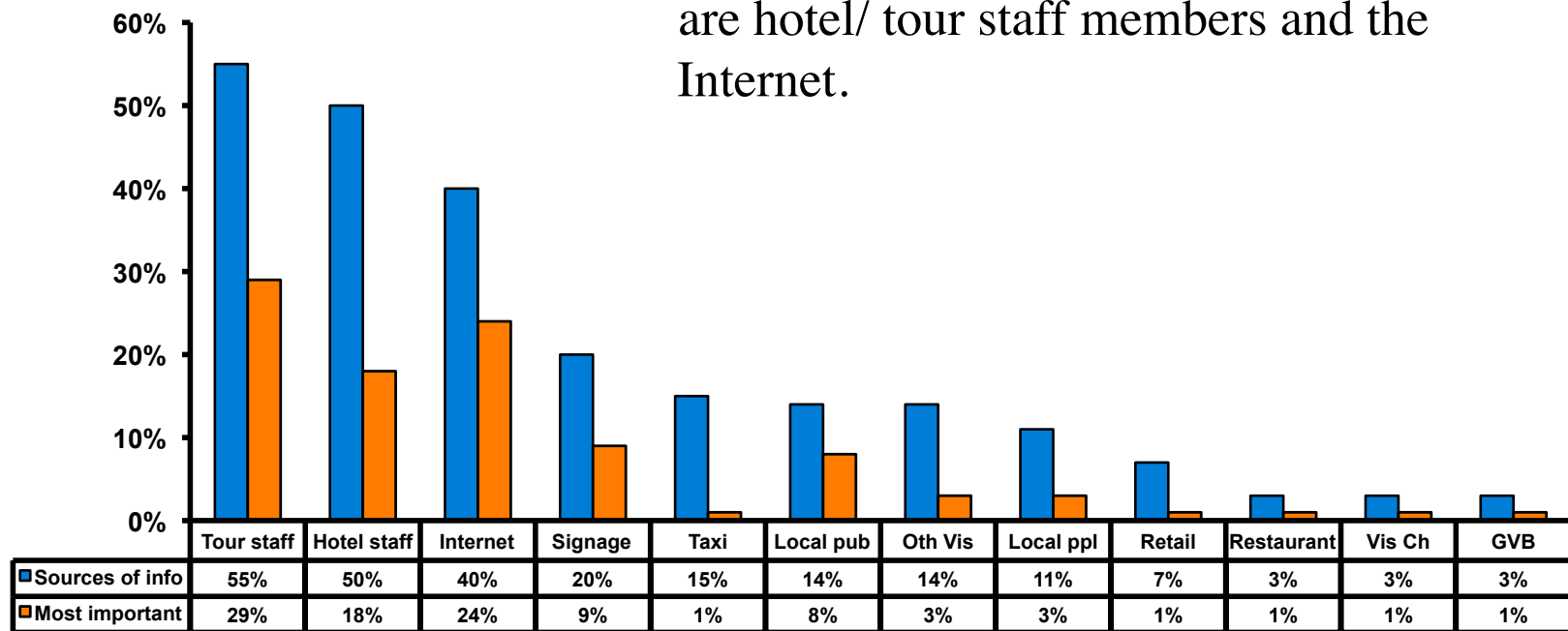
# Sources of Information Pre-arrival

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



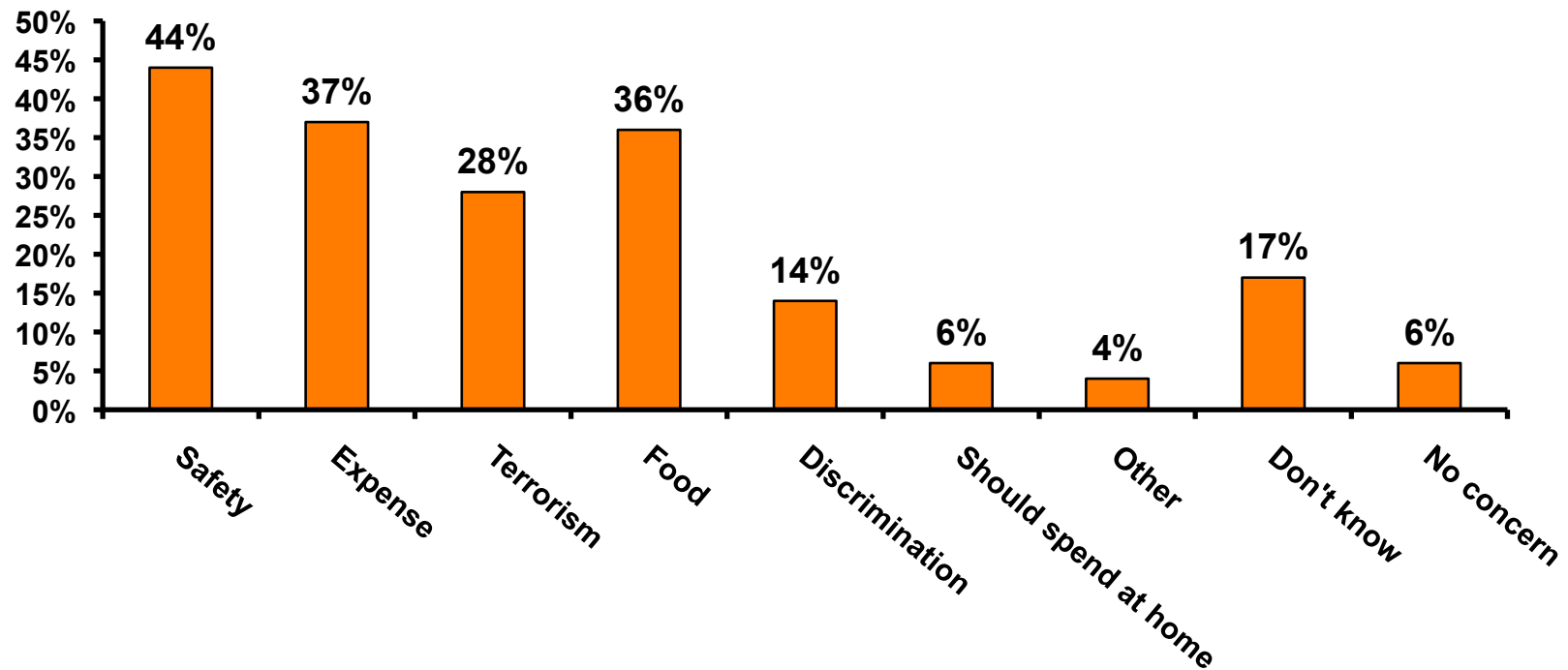
# Sources of Information Post-arrival

- 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

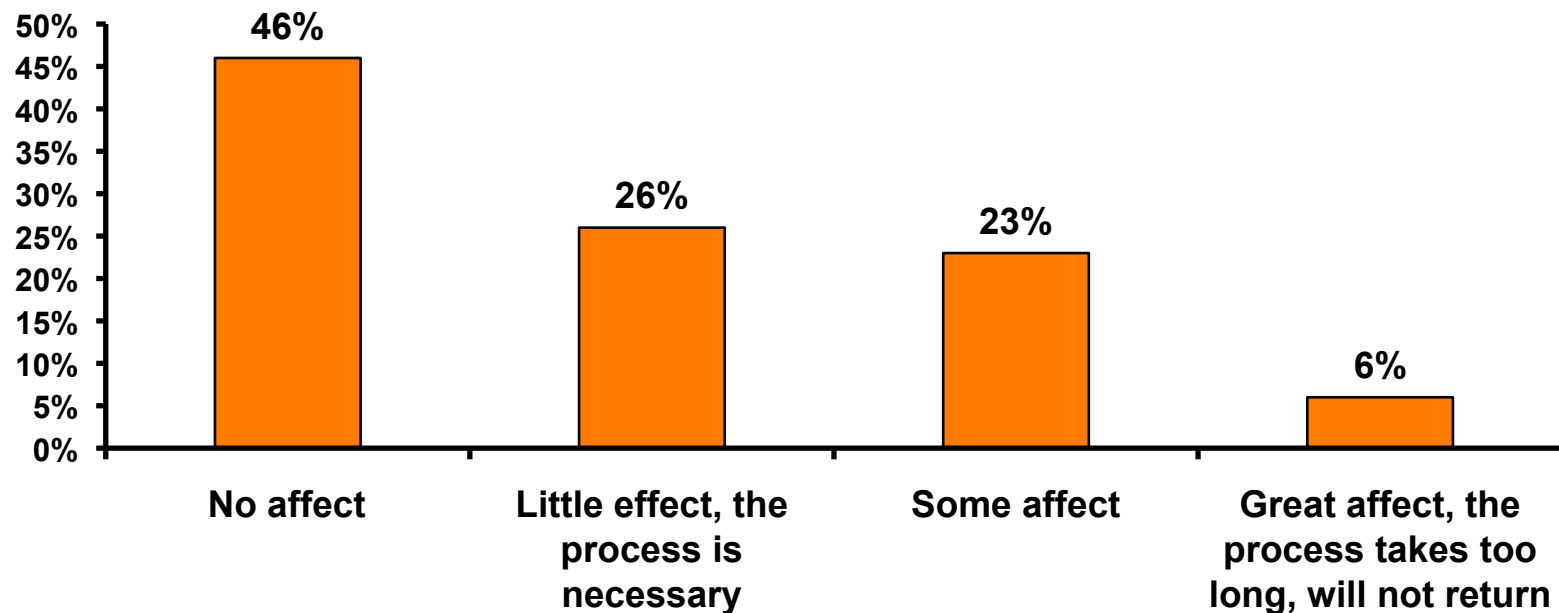


# Concerns about travel outside of Korea - By Age & Income

		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%	20%	42%	52%	39%		20%	35%	52%	45%	50%	58%	25%
	Expense	37%	50%	39%	33%	33%		53%	45%	44%	39%	39%	30%	75%
	Food	36%	40%	38%	31%	50%		47%	35%	31%	41%	50%	37%	75%
	Terrorism	28%	10%	28%	31%	17%		33%	24%	34%	34%	22%	36%	25%
	Don't know	17%	20%	17%	17%	17%		13%	9%	8%	14%	17%	12%	
	Discrimination against Koreans	14%	20%	13%	18%			20%	15%	13%	13%	11%	18%	25%
	Should spend at home	6%	10%	7%	5%	6%		7%	5%	13%	4%	6%	3%	
	No concerns	6%	10%	5%	6%	6%		13%	7%	7%	2%	3%	7%	25%
	Other	4%		7%					7%	3%	11%	3%	1%	
	Total	Count	350	10	208	108	18	15	55	61	56	36	67	4



# Security Screening/ Immigration Process at Guam International Airport



# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

