



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2013

OCTOBER 2012



Prepared by: QMark Research

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Background & Methodology

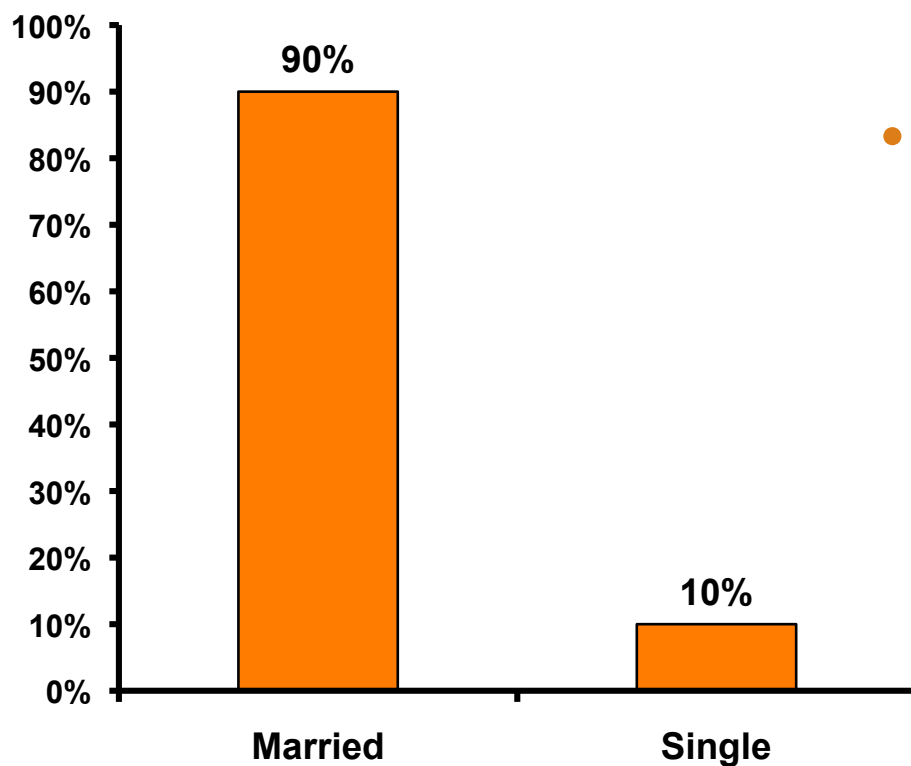
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

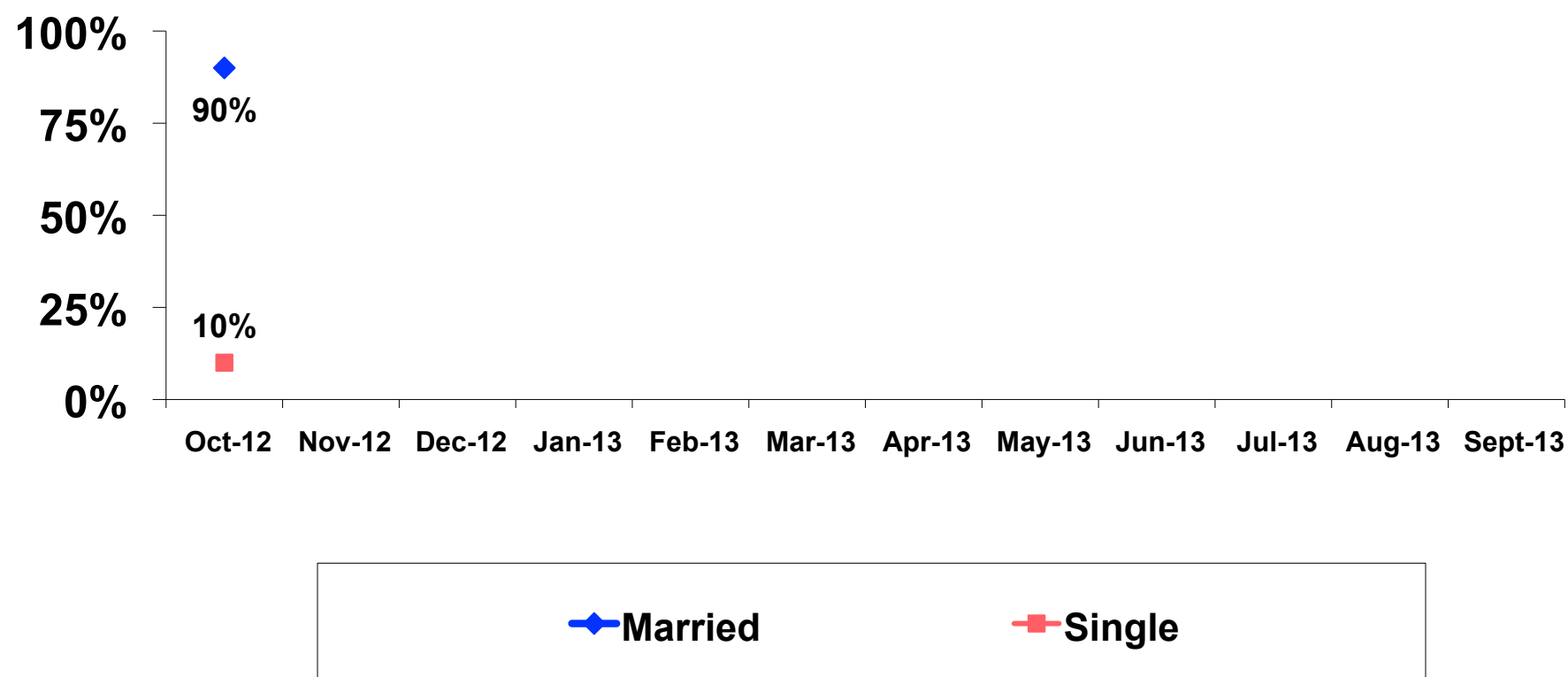
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

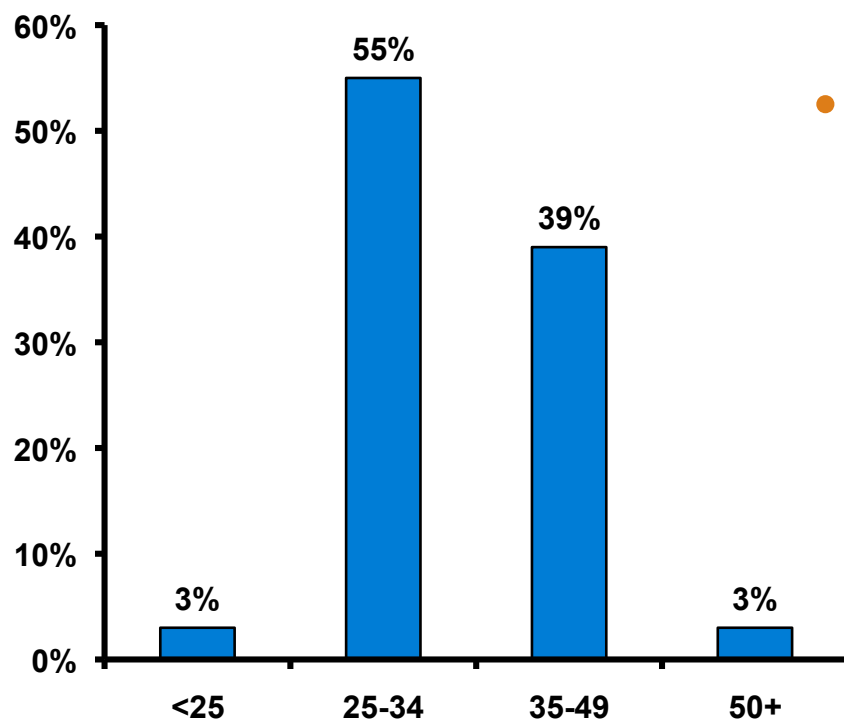


- Majority of Korean visitors are married.

Marital Status

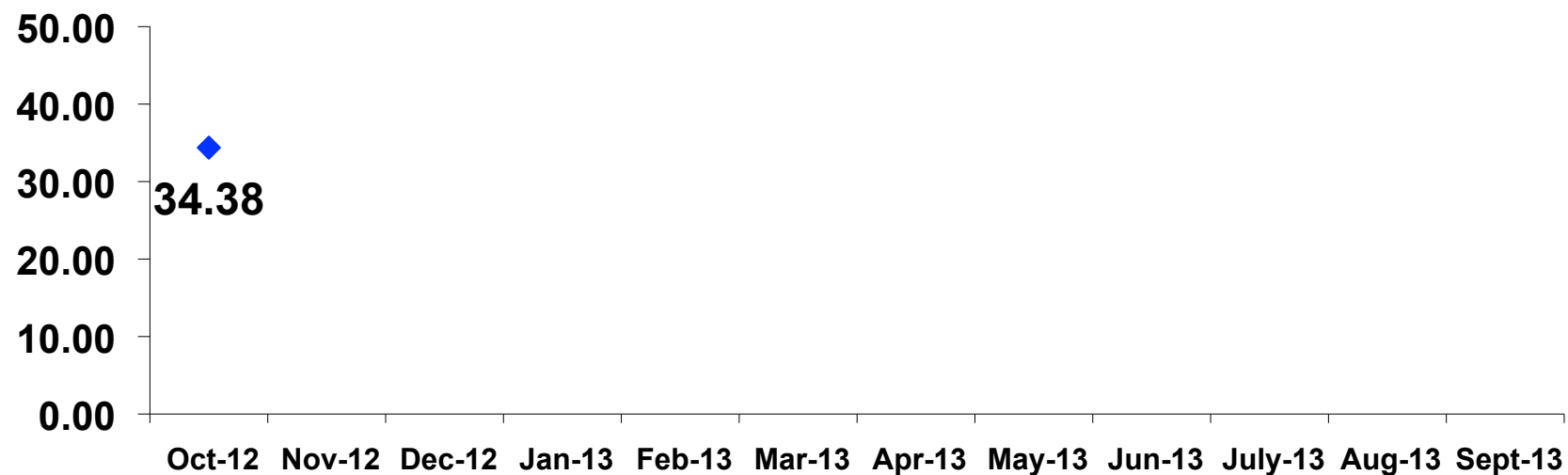


Age - Overall

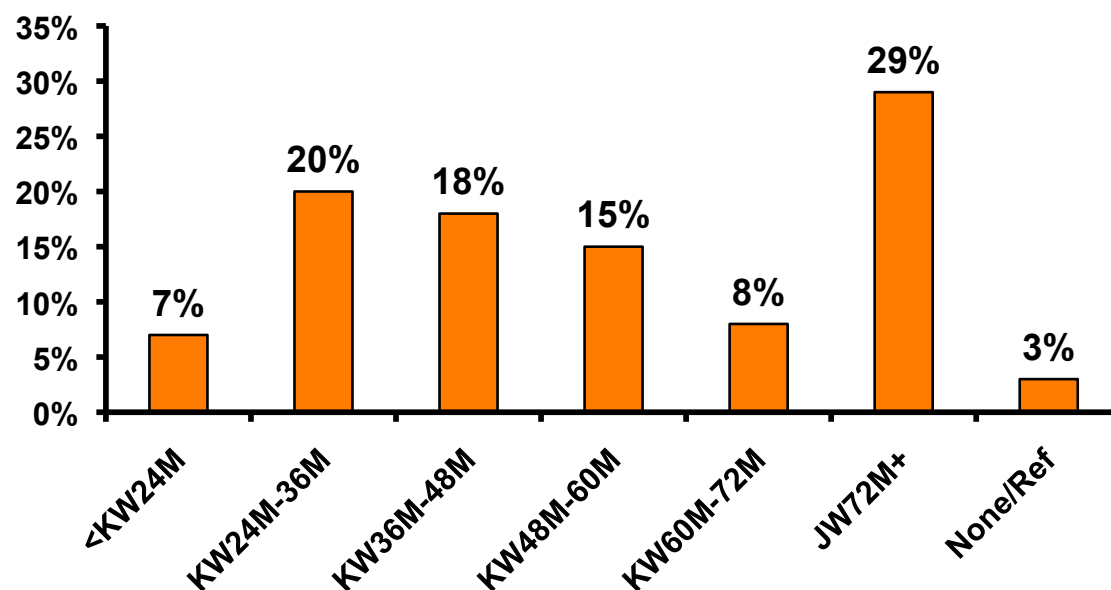


- The average age of the respondents is 34.38 years of age.

Average Age

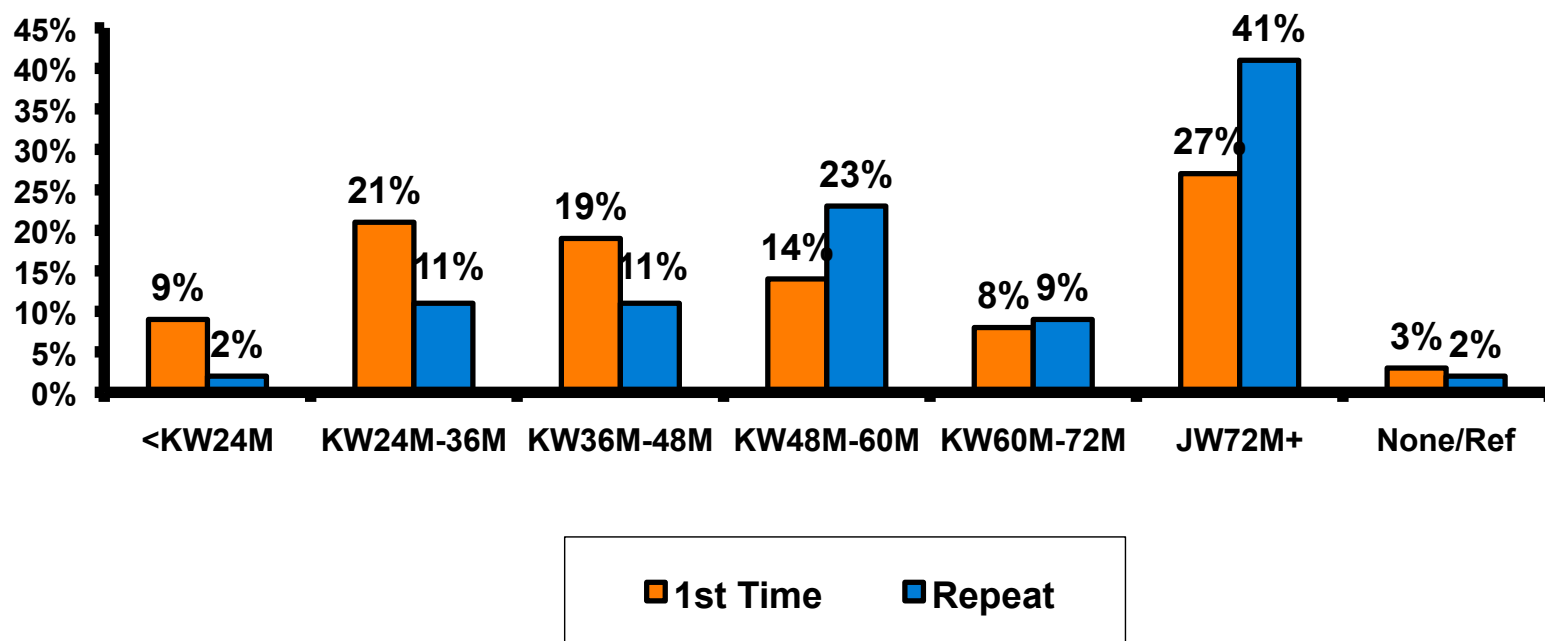


Personal Income



- KW1092.83=\$1

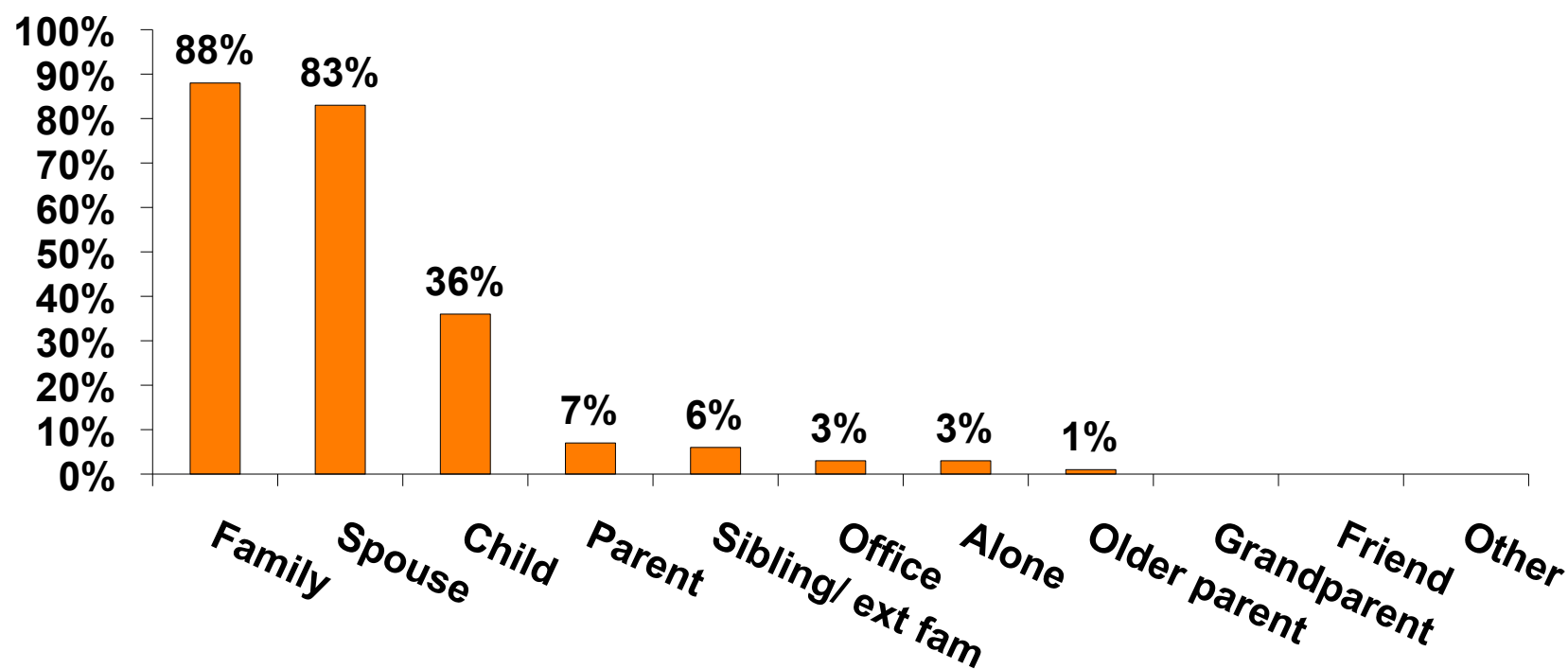
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	4	2	2	2	1	1	
		Column N %	1%	1%	1%	29%	1%	1%	
	KW12.0M-KW24.0M	Count	19	6	13	1	15	3	
		Column N %	6%	4%	8%	14%	9%	3%	
	KW24.0M-KW36.0M	Count	61	27	34		47	12	2
		Column N %	20%	18%	21%		28%	10%	17%
	KW36.0M-KW48.0M	Count	54	31	23	1	37	15	1
		Column N %	18%	21%	14%	14%	22%	13%	8%
	KW48.0M-KW60.0M	Count	46	25	21		24	20	1
		Column N %	15%	17%	13%		14%	17%	8%
	KW60.0M-KW72.0M	Count	24	11	13	1	12	10	1
		Column N %	8%	7%	8%	14%	7%	9%	8%
	KW72.0M+	Count	90	41	49	2	28	52	7
		Column N %	29%	28%	31%	29%	16%	45%	58%
	No Income	Count	9	5	4		6	3	
		Column N %	3%	3%	3%		4%	3%	
Total	Count	307	148	159	7	170	116	12	

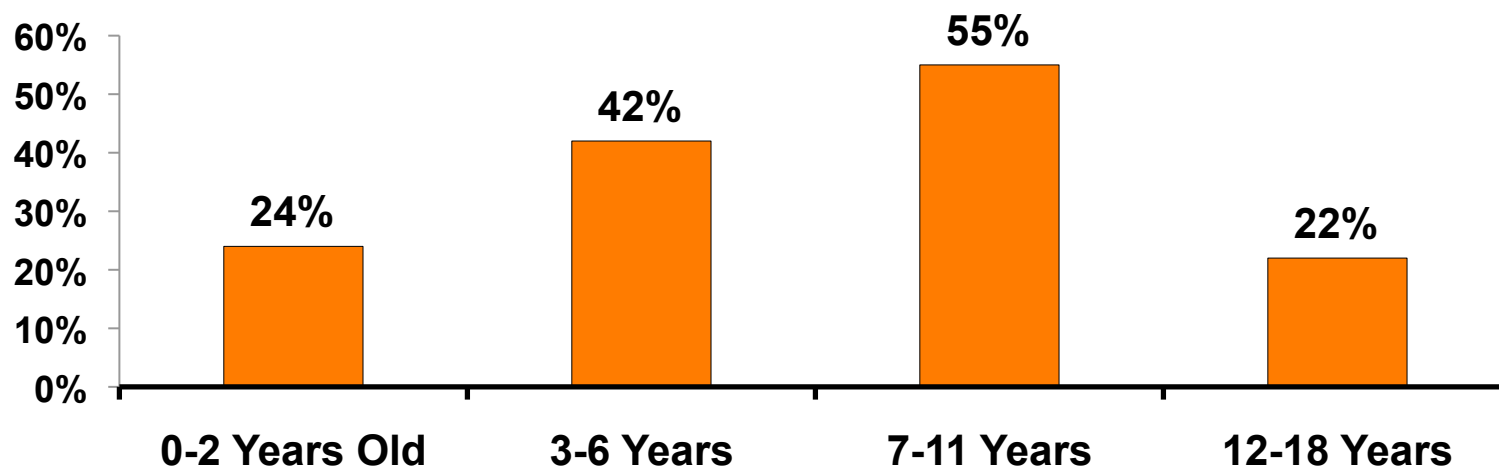
Travel Companions



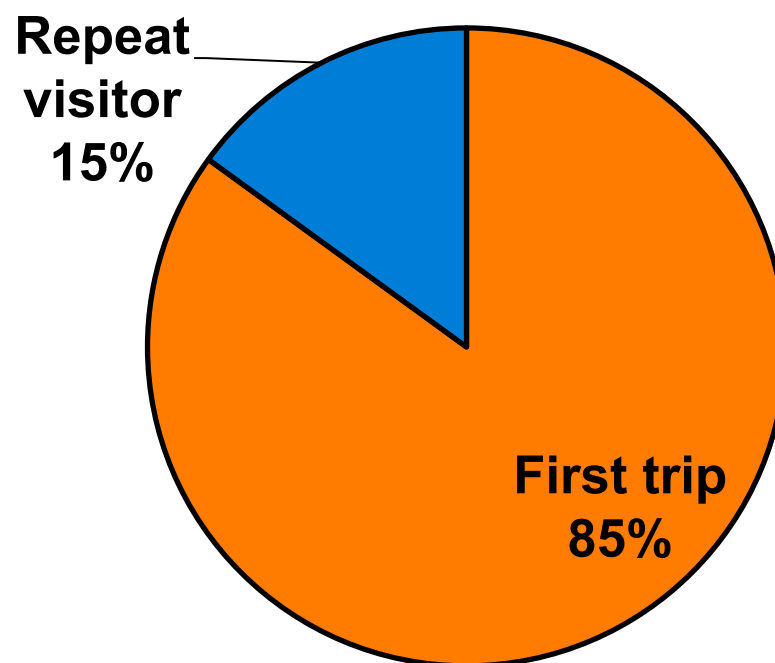
Number of Children Travel Party

N=125 total respondents traveling with children.

(Of those N=125 respondents, there is a total of 222 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



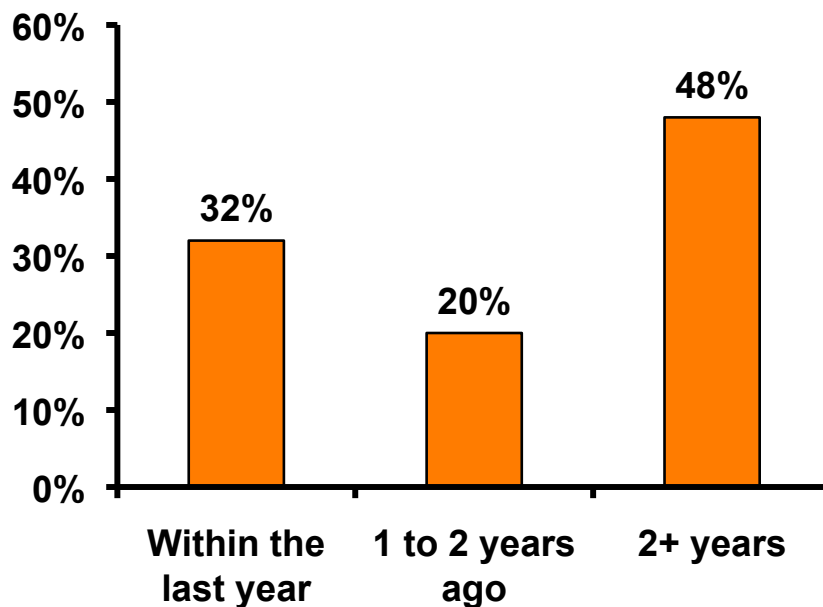
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	166	144	22
		Column N %	47%	48%	43%
	Female	Count	185	155	29
		Column N %	53%	52%	57%
AGE	Total	Count	351	299	51
	18-24	Count	9	8	1
		Column N %	3%	3%	2%
	25-34	Count	192	170	21
		Column N %	55%	57%	41%
	35-49	Count	136	108	28
		Column N %	39%	36%	55%
	50+	Count	12	11	1
		Column N %	3%	4%	2%
	Total	Count	349	297	51

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

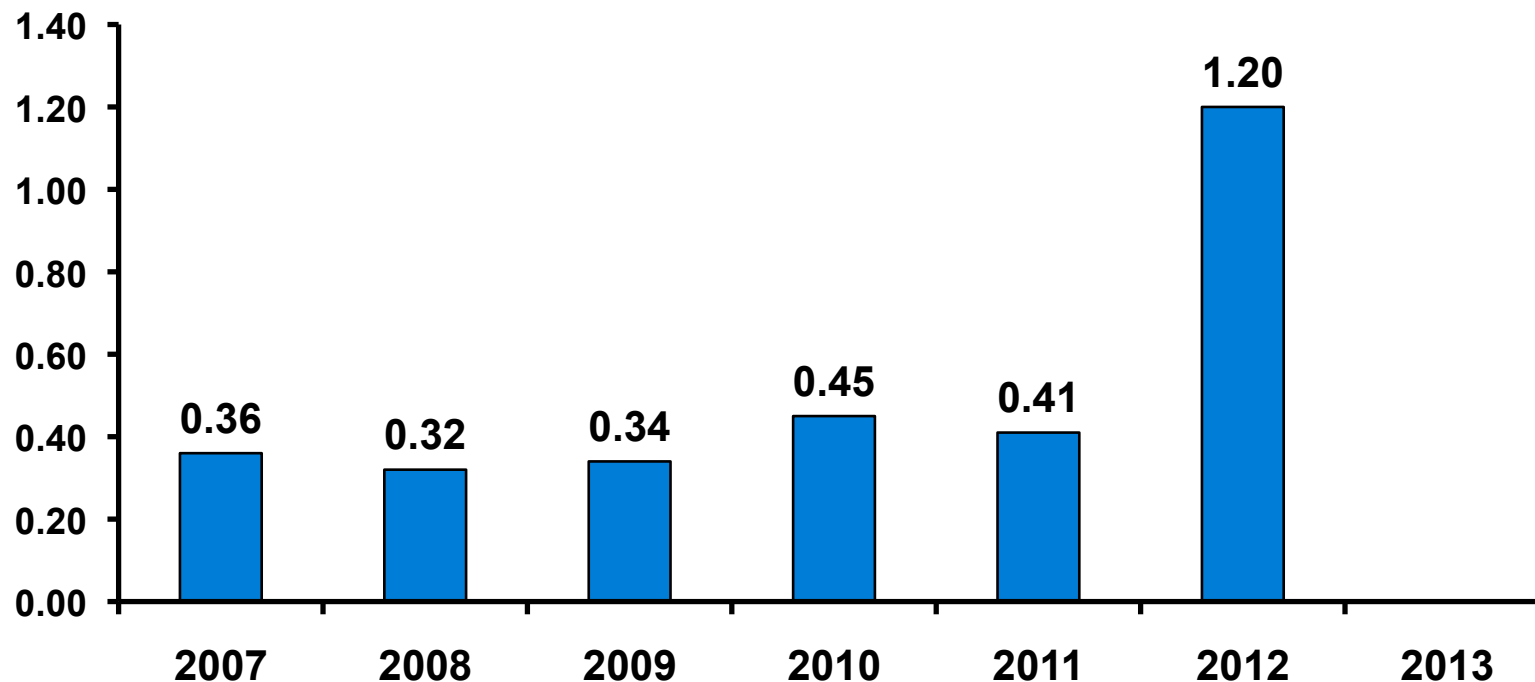
Repeat Visitors Last Trip

n = 50



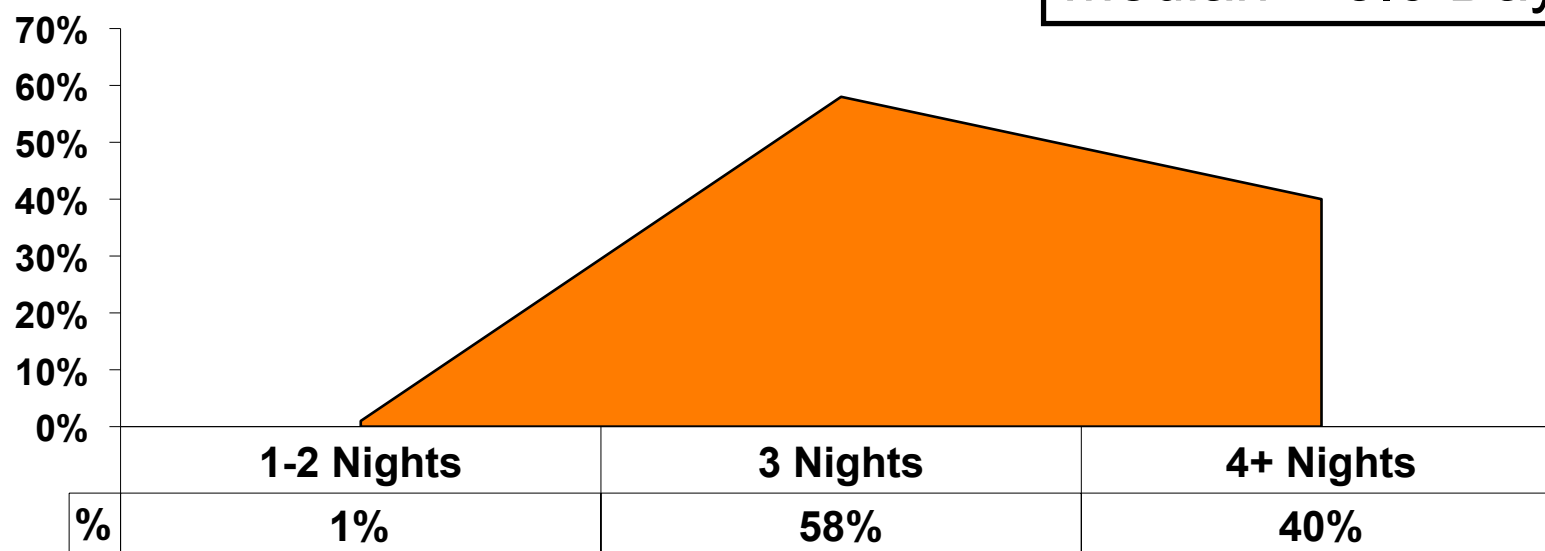
- The average repeat visitor has been to Guam 2.48 times.
- A little more than half of the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2007-2013) (2 nights or more)



Length of Stay

Mean = 3.60 Days
Median = 3.0 Days



Average Length of Stay

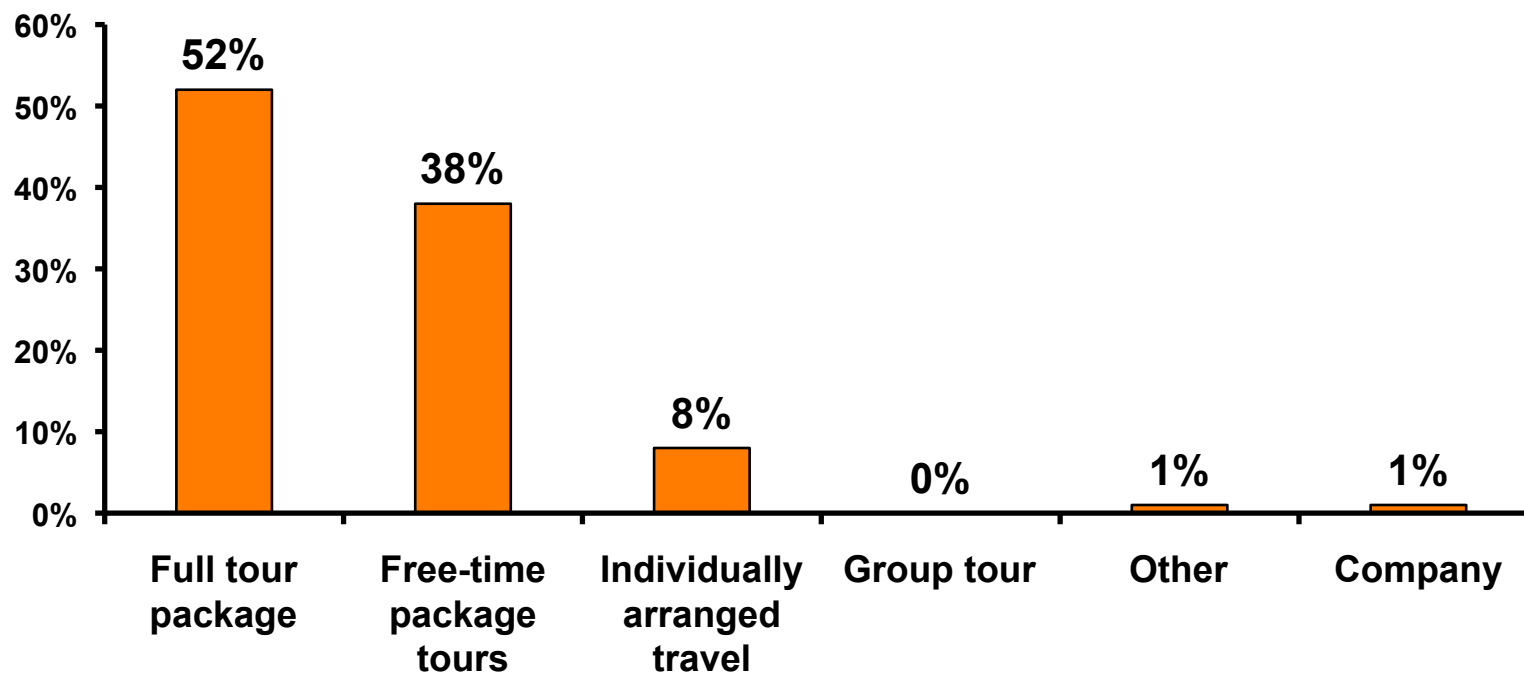


Occupation by Income

		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	29%		47%	28%	35%	32%	26%	28%	22%
	Housewife/ Homemaker	14%	25%	6%	10%	13%	14%	26%	15%	22%
	Self-employed	14%	50%	18%	7%	13%	9%	9%	19%	
	Professional/ Specialist/ Tech	13%		12%	7%	17%	18%	17%	15%	
	Professor/ Teacher/ After-school	6%			10%	2%	5%	4%	9%	
	Service worker/ Private hse worker	4%		6%	13%		2%	4%	2%	
	Unemployed	3%			3%				1%	33%
	Manager/ Admin	3%		6%		2%	2%	4%	5%	
	Other	2%		6%	3%		2%	4%	1%	
	Student	2%	25%		2%		2%	4%	1%	11%
	Skilled worker	2%			5%	2%	2%		1%	
	Sales worker/ Clerical	2%				6%	5%			
	Freelancer	2%			2%	2%	2%		1%	
	Govt- Executive	1%				4%	2%		1%	
	Govt- office worker non-mgr	1%			7%					
	Retired	1%			2%		2%			11%
	Govt- Manager	1%				4%				
	Judicial	0%			2%					
	Total Count	312	4	17	60	52	44	23	88	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

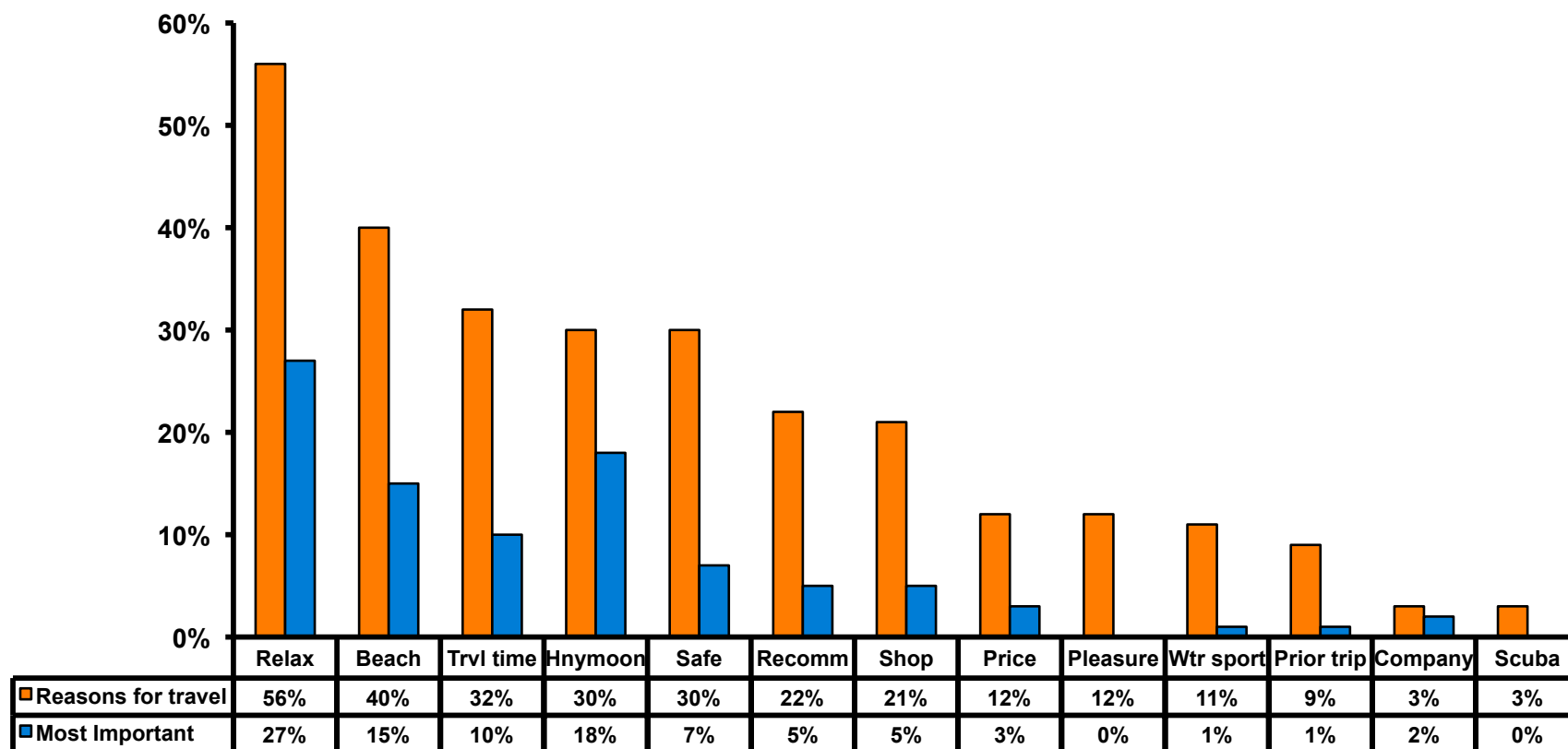


Accommodation by Income

Average length of stay: 3.60 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+	No Income
Q9	PIC Club	45%	25%	42%	39%	31%	37%	54%	59%	44%
	Hyatt Regency Guam	17%		21%	25%	30%	9%	17%	8%	11%
	Sheraton Laguna Guam	10%	50%	11%	10%	7%	9%	8%	7%	
	Hotel Nikko Guam	8%		16%	3%	13%	11%	4%	9%	22%
	Onward Beach Resort	6%			8%	2%	9%	4%	8%	
	Hilton Guam Resort	4%			7%	4%	11%	4%	1%	11%
	Outrigger Guam Resort	4%		11%	5%	4%	2%		4%	
	Westin Resort Guam	3%			3%	4%	9%	4%	2%	
	Hotel Santa Fe	1%				2%			1%	
	Ramada Suites Guam	1%	25%			2%				
	Home stay/ friend/ relative	1%					4%			
	Royal Orchid Guam	1%				2%				11%
	Guam Aurora Resort	0%						4%		
	Holiday Resort Guam	0%							1%	
	Total Count	350	4	19	61	54	46	24	90	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Relaxation,
 - Honeymoon and
 - Guam's natural beauty/ beaches
- 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	56%	33%	51%	65%	50%	54%	58%
	Natural beauty	40%	22%	34%	49%	67%	39%	42%
	Short travel time	32%	11%	35%	31%	25%	24%	40%
	Honeymoon	30%	56%	44%	13%		37%	24%
	Safe	30%	22%	24%	35%	42%	25%	34%
	Recomm- friend/family/trvl agnt	22%		20%	26%	25%	22%	21%
	Shopping	21%	11%	25%	16%	17%	15%	26%
	Price	12%		14%	11%	17%	11%	14%
	Pleasure	12%		12%	10%	25%	7%	15%
	Water sports	11%		11%	12%	8%	7%	14%
	Previous trip	9%		7%	12%	8%	5%	12%
	Company Sponsored	3%		3%	4%		2%	4%
	Scuba	3%		4%	1%		2%	3%
	Visit friends/ Relatives	3%		3%	2%		1%	4%
	Organized sports	2%		3%	1%		2%	2%
	Career Cert/ Testing	2%	11%	2%	1%		4%	
	Married/ Attn wedding	1%		2%	1%		1%	2%
	Company/ Business Trip	1%	11%		1%		1%	1%
	Other	1%	11%		1%			1%
	Golf	1%		1%	1%		1%	1%
	Convention/ Trade/ Conference	0%			1%		1%	
Total	Count	347	9	188	136	12	165	182

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	56%		42%	50%	49%	69%	63%	71%	44%
	Natural beauty	40%		21%	32%	36%	56%	46%	49%	33%
	Short travel time	32%	25%	11%	25%	28%	38%	54%	44%	11%
	Honeymoon	30%	50%	47%	53%	40%	22%	13%	10%	22%
	Safe	30%	25%	26%	15%	26%	47%	33%	43%	11%
	Recomm- friend/family/trvl agnt	22%		32%	20%	23%	16%	29%	22%	22%
	Shopping	21%	25%	11%	18%	8%	42%	8%	26%	22%
	Price	12%			13%	8%	20%	13%	18%	
	Pleasure	12%		5%	10%	6%	11%	8%	18%	11%
	Water sports	11%	25%	5%	15%	13%	4%	8%	14%	
	Previous trip	9%			2%	6%	9%	8%	18%	
	Company Sponsored	3%	25%	5%	7%			4%	1%	
	Scuba	3%	25%		7%			4%	2%	
	Visit friends/ Relatives	3%		5%		2%		4%		33%
	Organized sports	2%	25%		5%		2%		1%	
	Career Cert/ Testing	2%	25%			4%	4%			11%
	Married/ Attn wedding	1%		5%	2%			4%	1%	
	Company/ Business Trip	1%				2%	2%			11%
	Other	1%	25%						1%	
	Golf	1%				2%		4%		
Convention/ Trade/ Conference	0%					2%				
Total	Count	347	4	19	60	53	45	24	90	9

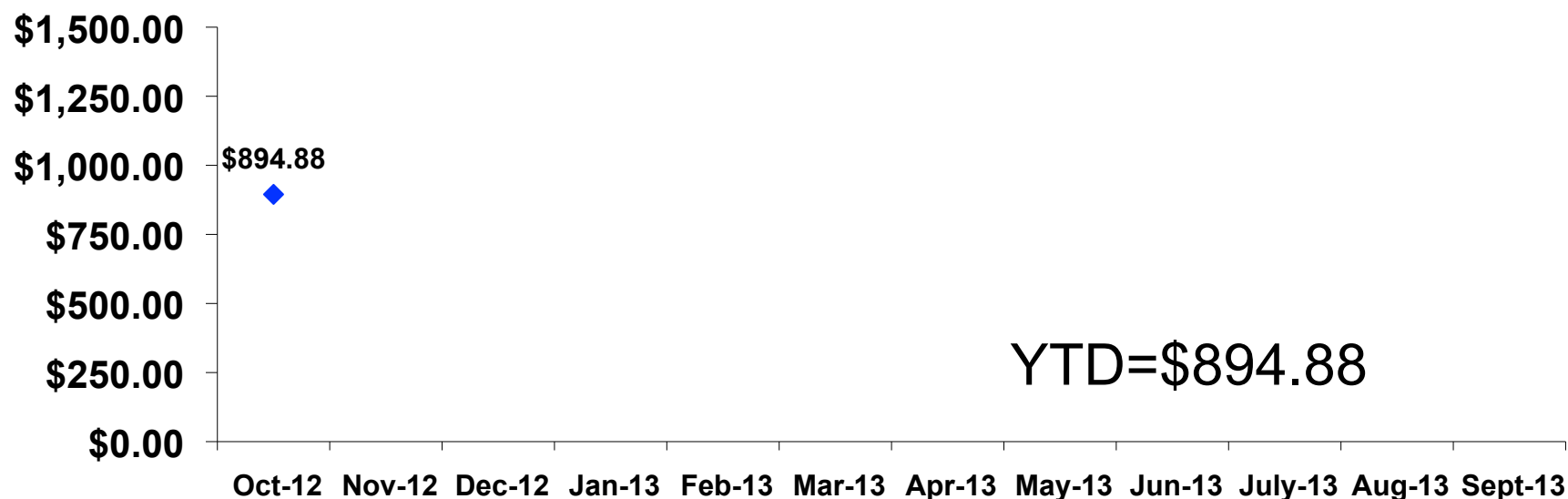
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW 1,092.83/US\$1

- \$2,128.83 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$17,844 = maximum (highest amount recorded for the entire sample)
- \$894.88 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

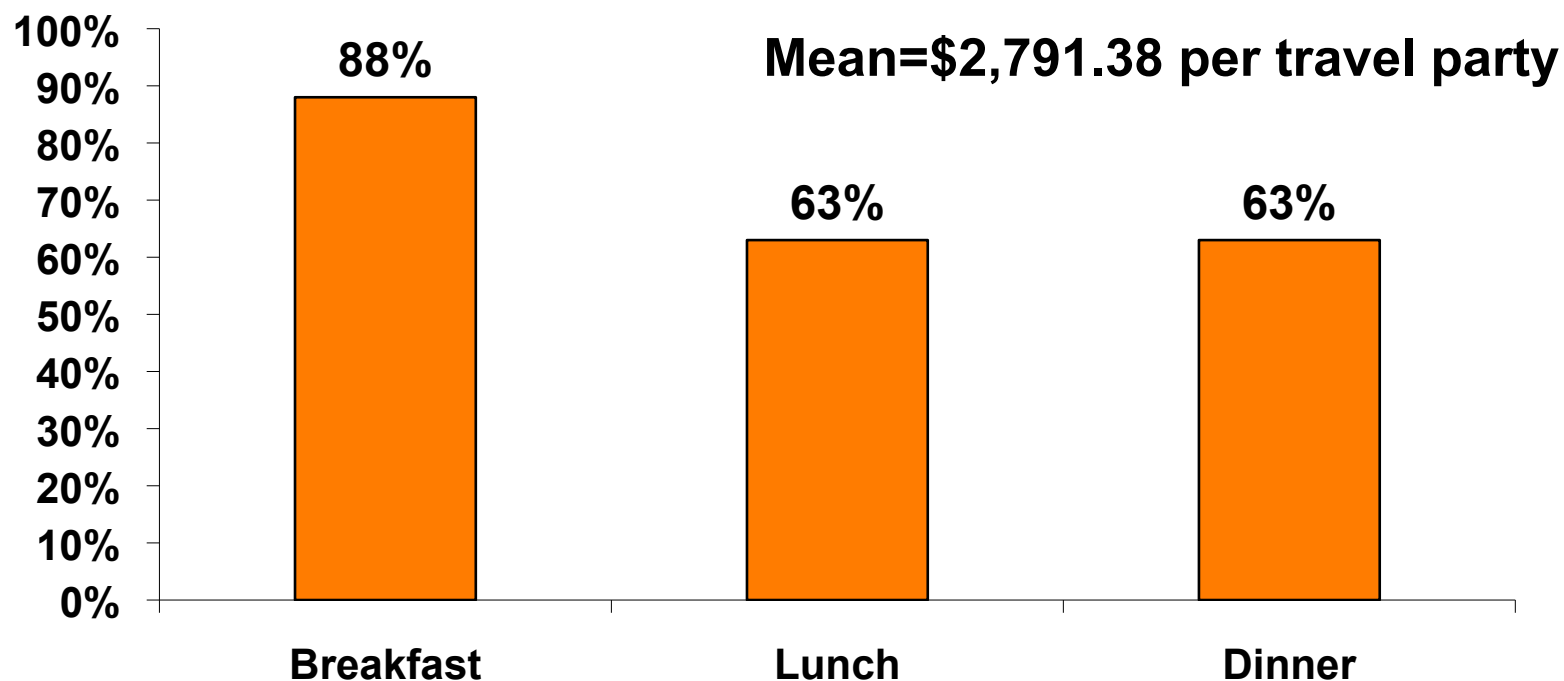
KW 1,092.83=\$1

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

	MEAN \$
Air & Accommodation package only	\$1,926.57
Air & Accommodation w/ daily meal package	\$2,791.38
Air only	\$1,167.84
Accommodation only	\$-
Accommodation w/ daily meal only	\$1,207.87
Food & Beverages in Hotel	\$-
Ground transportation- Japan	\$106.15
Ground transportation- Guam	\$247.06
Optional tours/ activities	\$208.18
Other expenses	\$458.58
Total Prepaid	\$2,128.83

Prepaid Meal Breakdown

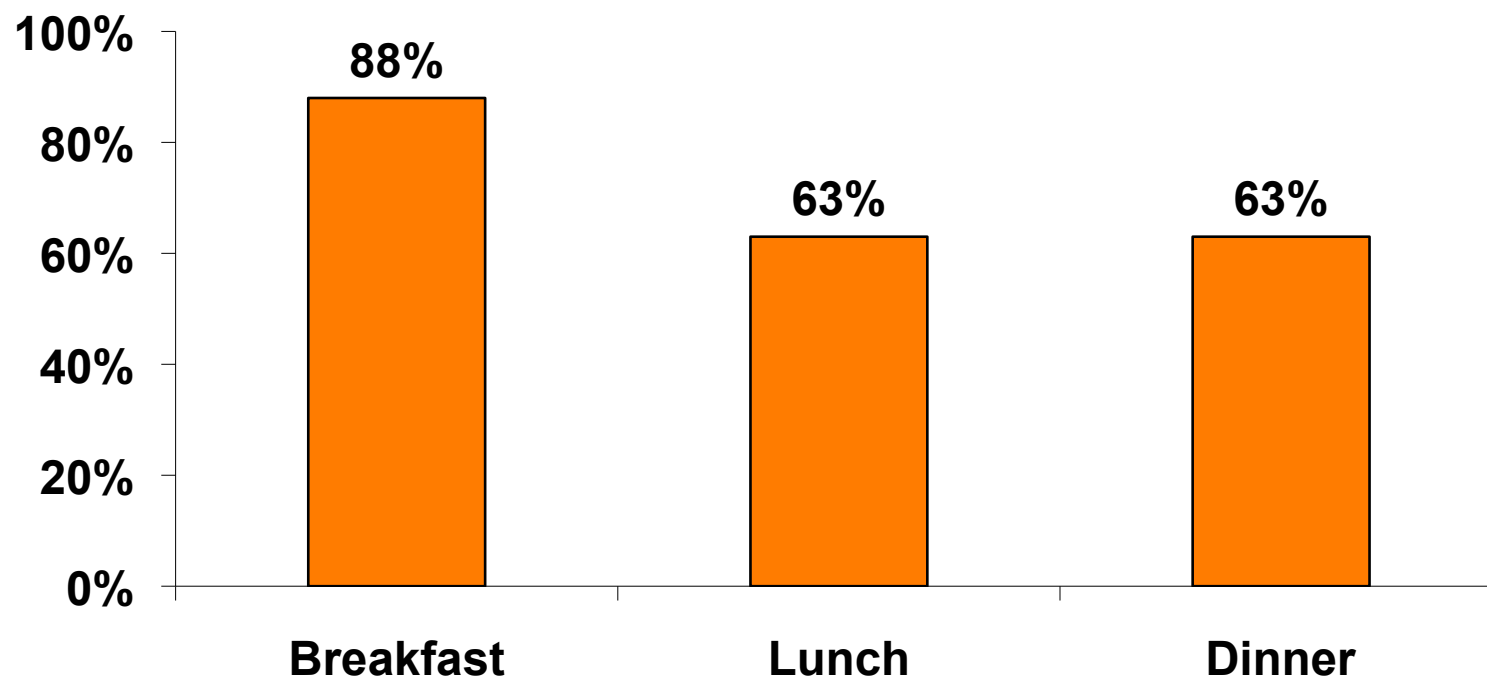
Air/ Accommodations with Daily Meal Package
n=8



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

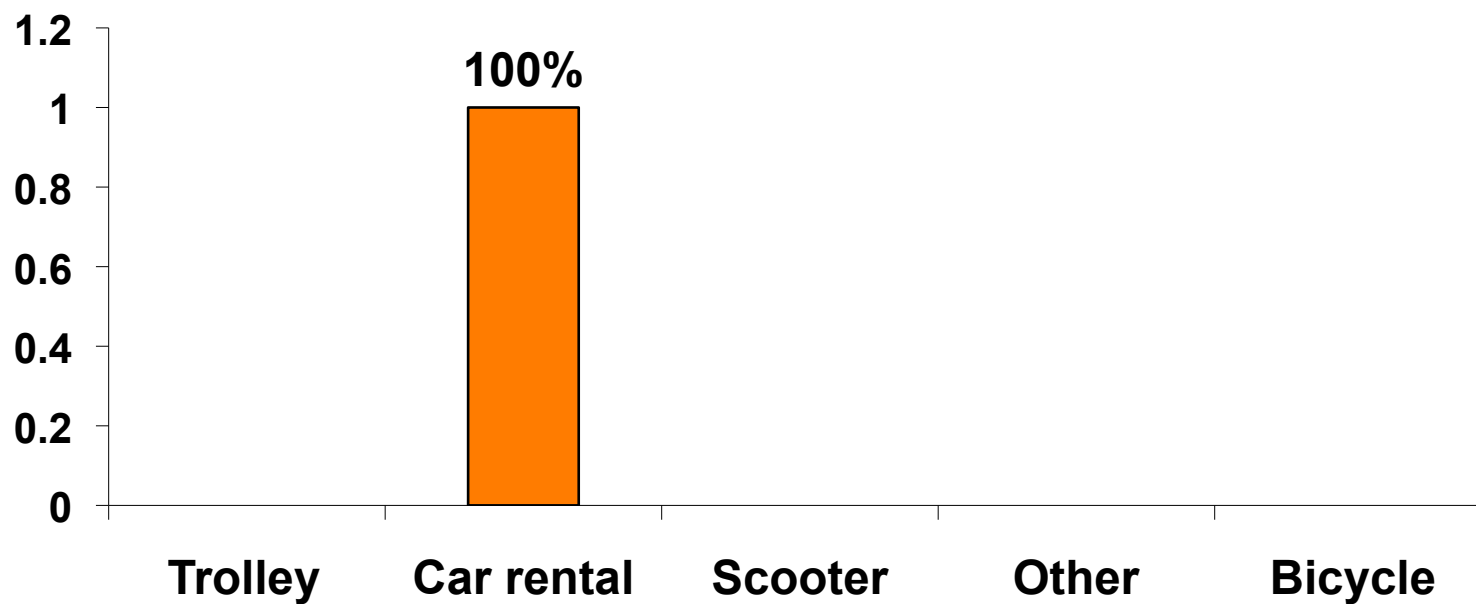
n=8



Mean=\$1,207.87per travel party

Prepaid Ground Transportation

n=2

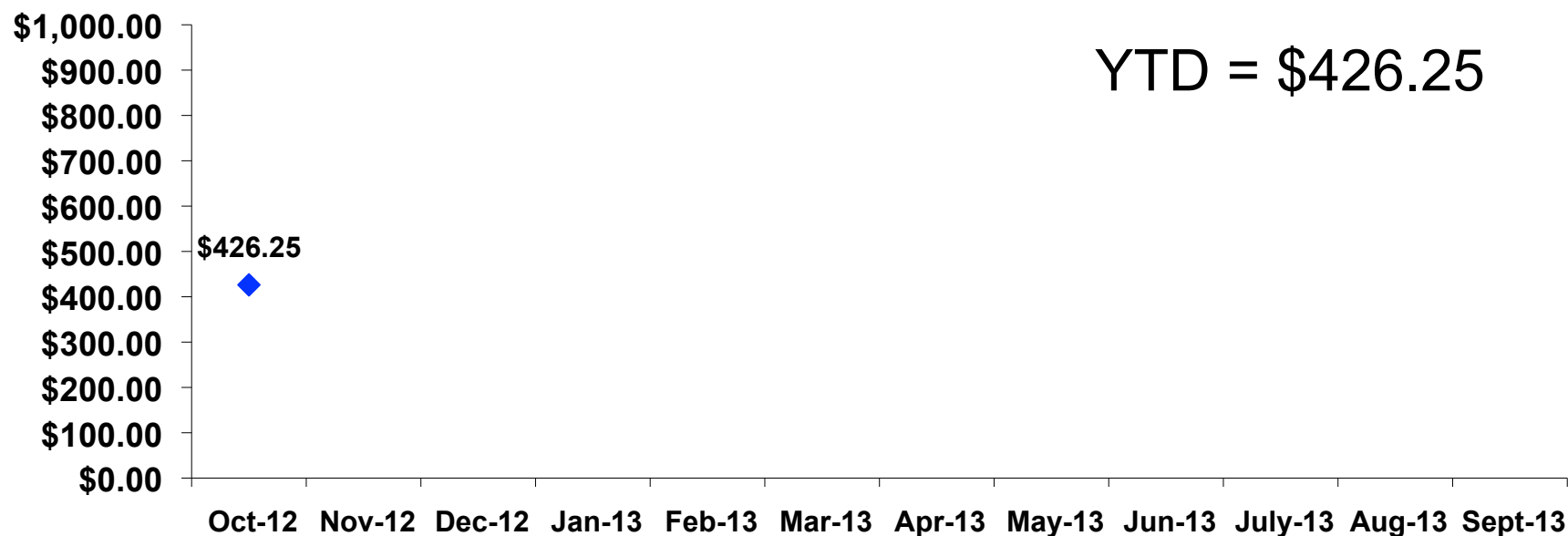


Mean=\$247.06 per travel party

On-Island Expenditures

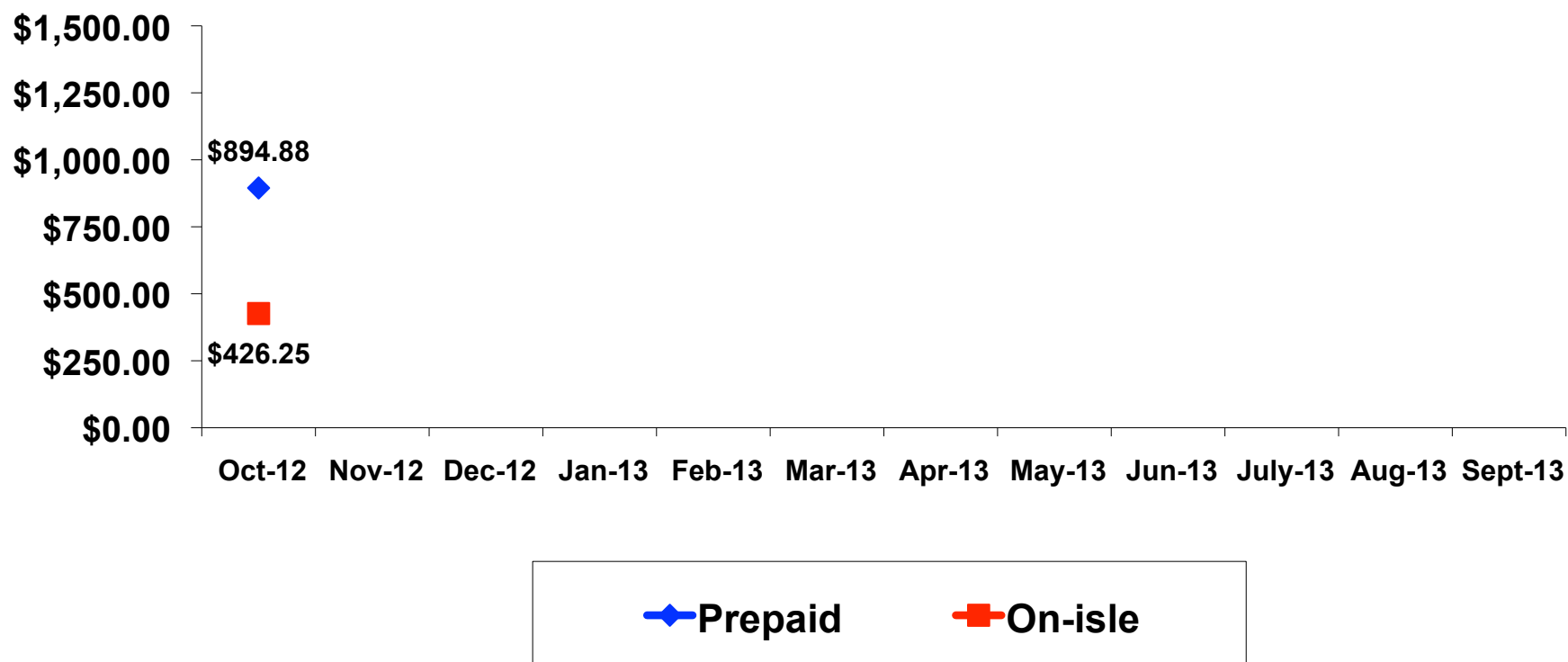
- \$934.39 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,000 = Maximum (highest amount recorded for the entire sample)
- \$426.25 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$894.88 On-Island YTD = \$426.25



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	\$426.25	\$439.08	\$414.74	\$217.50	\$579.47	\$267.90	\$682.82	\$645.80	\$468.85	\$305.62	\$412.00
	Median	\$300	\$300	\$280	\$185	\$442	\$200	\$430	\$300	\$350	\$200	\$150
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$220	\$0	\$0	\$0	\$0
	Maximum	\$3,000	\$3,000	\$3,000	\$500	\$3,000	\$1,050	\$2,175	\$1,929	\$3,000	\$2,000	\$1,500

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$49.53	\$44.19	\$54.31	\$3.89	\$39.08	\$66.51	\$66.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.58	\$26.77	\$26.41	\$26.89	\$25.45	\$27.21	\$37.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$47.42	\$52.51	\$42.83	\$48.89	\$58.64	\$31.63	\$44.08
	Median	\$0	\$0	\$0	\$20	\$0	\$0	\$0
OPT TOUR	Mean	\$90.45	\$96.93	\$84.64	\$46.67	\$92.01	\$94.57	\$58.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.24	\$254.72	\$191.21	\$181.11	\$264.12	\$150.48	\$354.17
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$13
GIFT- OTHER	Mean	\$177.89	\$172.71	\$182.54	\$291.11	\$156.23	\$139.35	\$891.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$400
TRANS	Mean	\$24.52	\$27.40	\$21.95	\$7.33	\$29.91	\$17.07	\$35.58
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$19
OTHER	Mean	\$292.64	\$312.46	\$274.86	\$119.44	\$305.92	\$303.73	\$25.00
	Median	\$20	\$50	\$10	\$0	\$19	\$75	\$0
TOTAL	Mean	\$934.39	\$1,001.05	\$874.57	\$725.33	\$982.66	\$825.90	\$1,504.08
	Median	\$700	\$750	\$600	\$220	\$700	\$600	\$930

On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$49.53	\$49.68	\$49.61
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$26.58	\$24.76	\$37.76
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$47.42	\$45.98	\$56.76
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$90.45	\$103.64	\$14.90
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.24	\$237.86	\$128.14
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$177.89	\$175.67	\$194.41
	Median	\$0	\$0	\$0
TRANS	Mean	\$24.52	\$23.65	\$30.12
	Median	\$0	\$0	\$0
OTHER	Mean	\$292.64	\$281.54	\$362.53
	Median	\$20	\$22	\$20
TOTAL	Mean	\$934.39	\$948.27	\$870.31
	Median	\$700	\$700	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,321.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,830 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

YTD=\$1,321.40

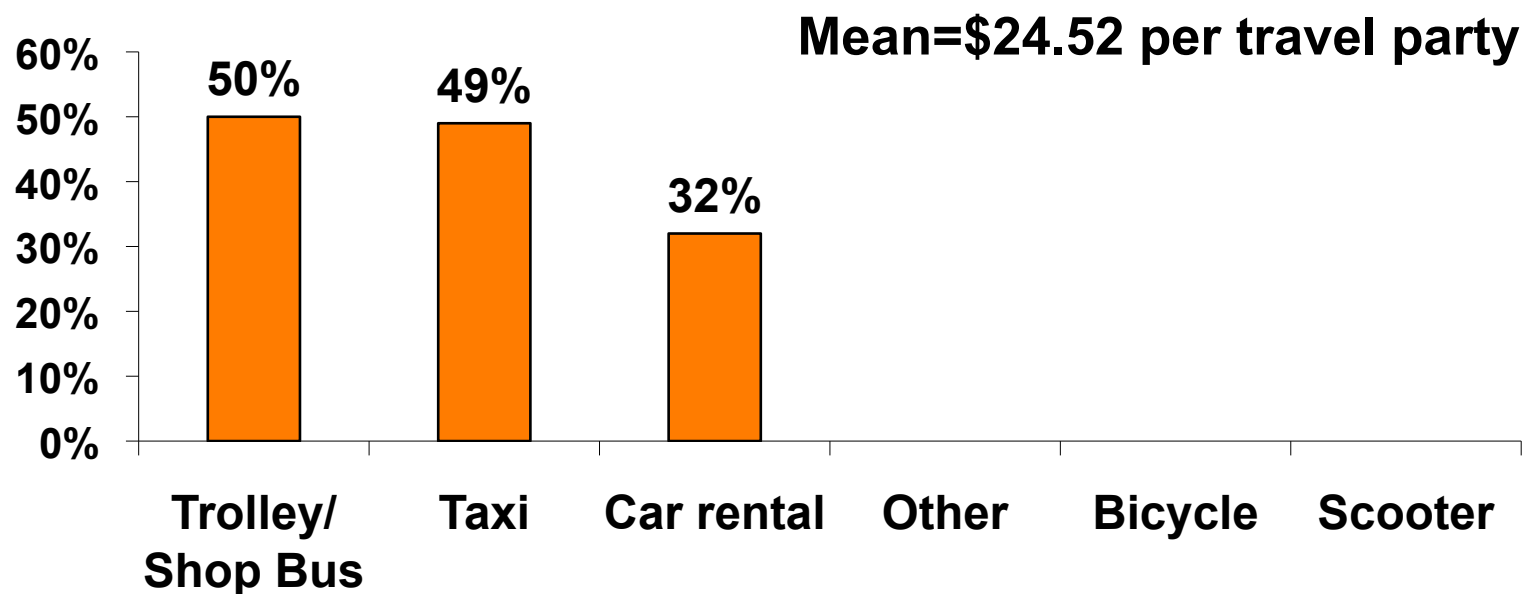


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$49.53
Food & beverage in fast food restaurant/ convenience store	\$26.58
Food & beverage at restaurants or drinking establishments outside a hotel	\$47.42
Optional tours and activities	\$90.45
Gifts/ souvenirs for yourself/companions	\$221.24
Gifts/ souvenirs for friends/family at home	\$177.89
Local transportation	\$24.52
Other expenses not covered	\$292.64
Average Total	\$934.39

Local Transportation

n=114



Guam Airport Expenditures

- \$54.60 = 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

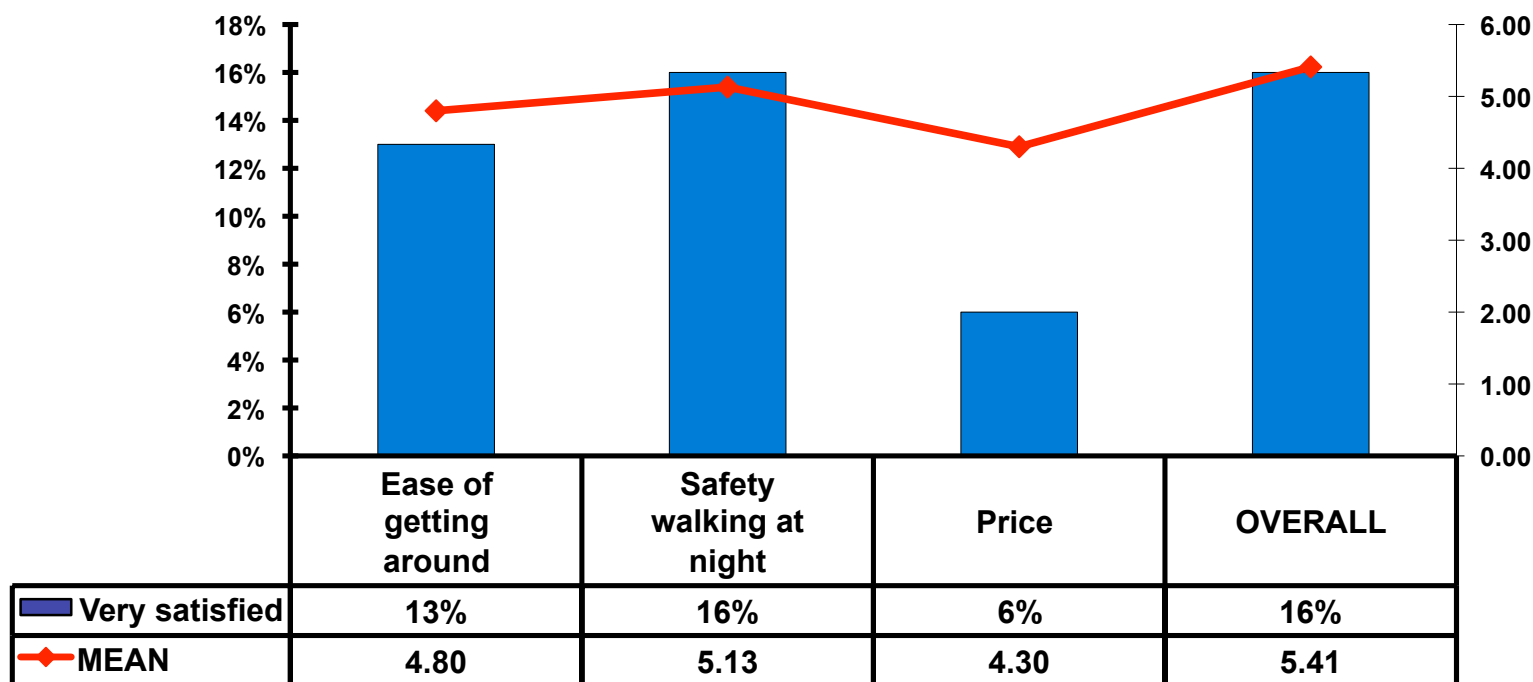
	MEAN \$
Food & Beverages	\$4.82
Gifts/Souvenirs Self	\$30.91
Gifts/Souvenirs Others	\$18.87
Total	\$54.60

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

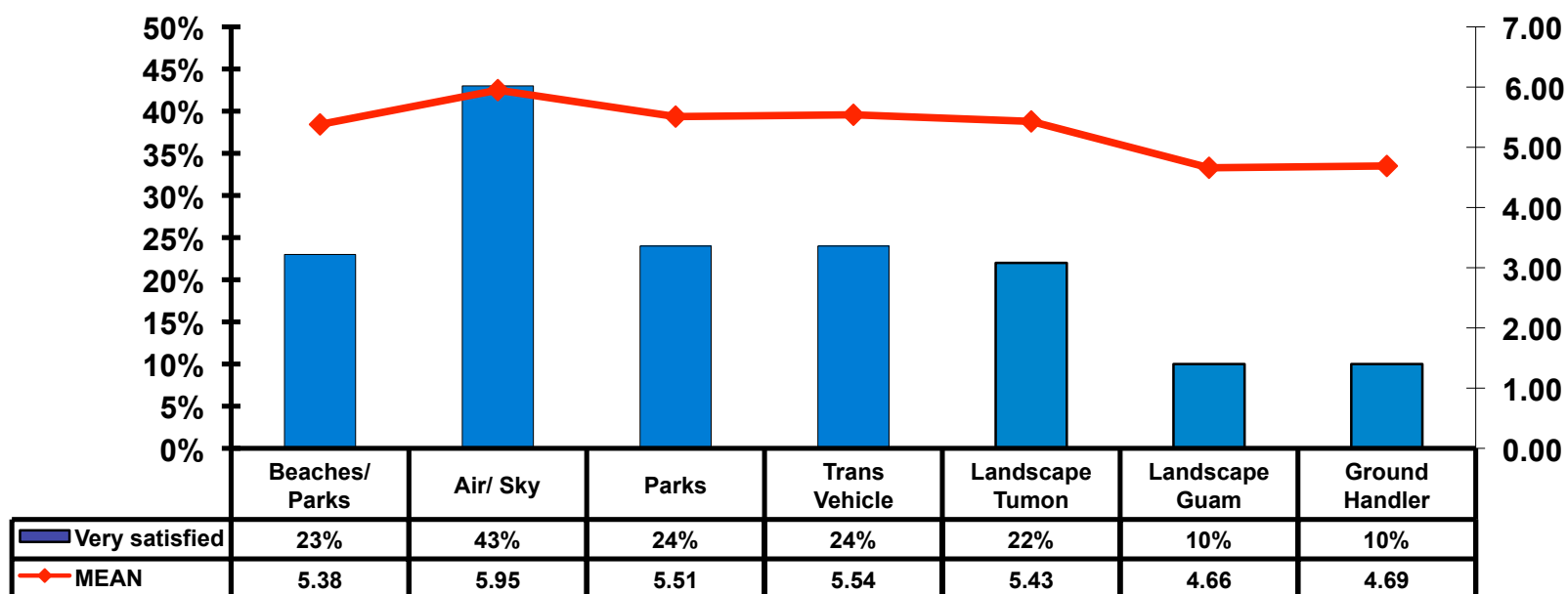
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

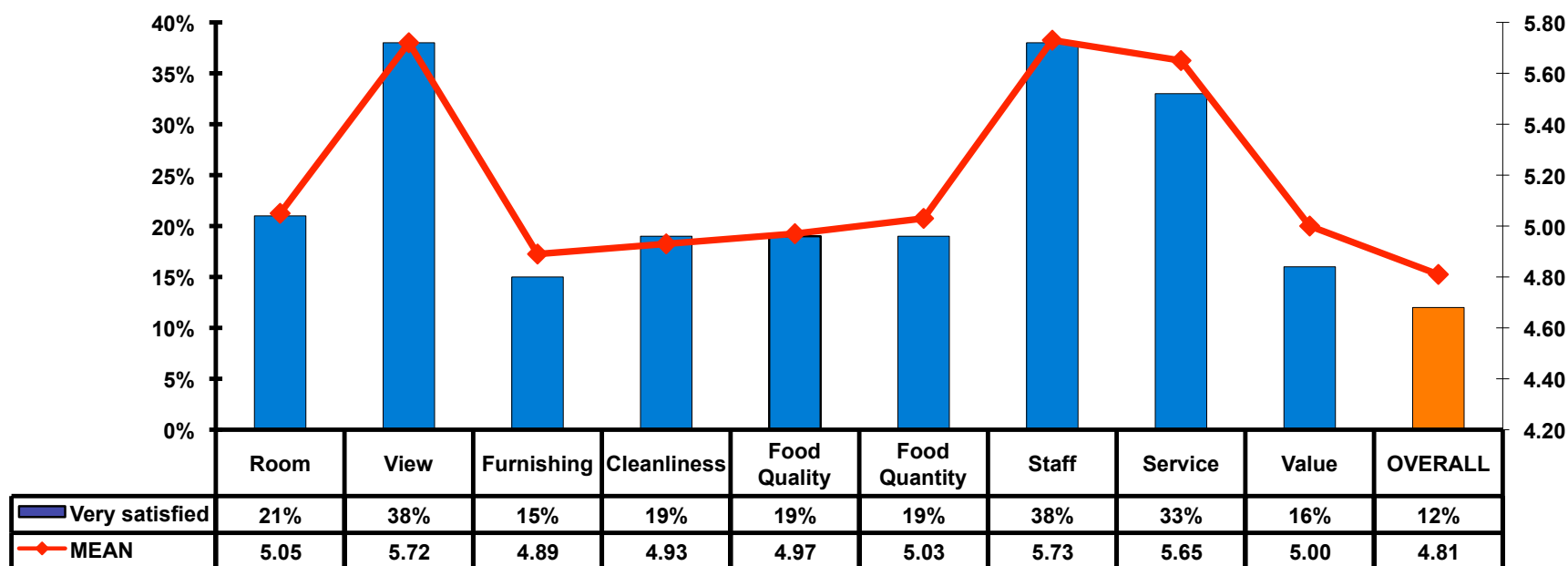
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

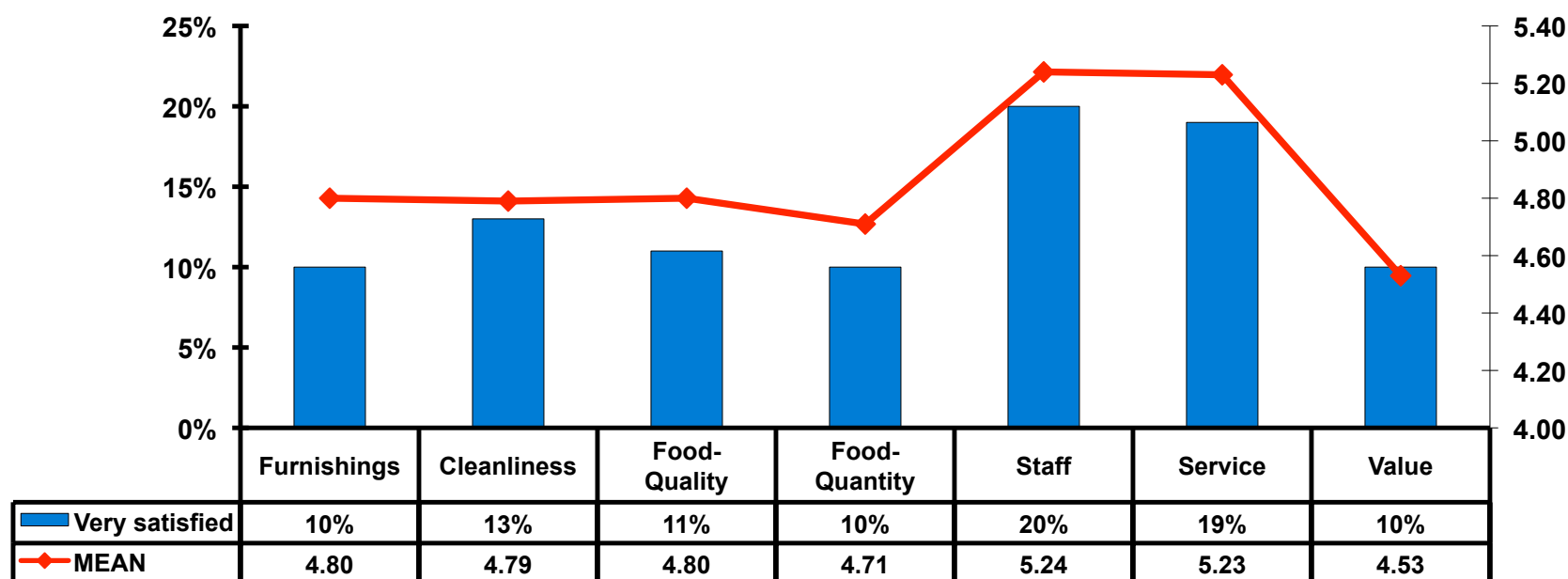
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

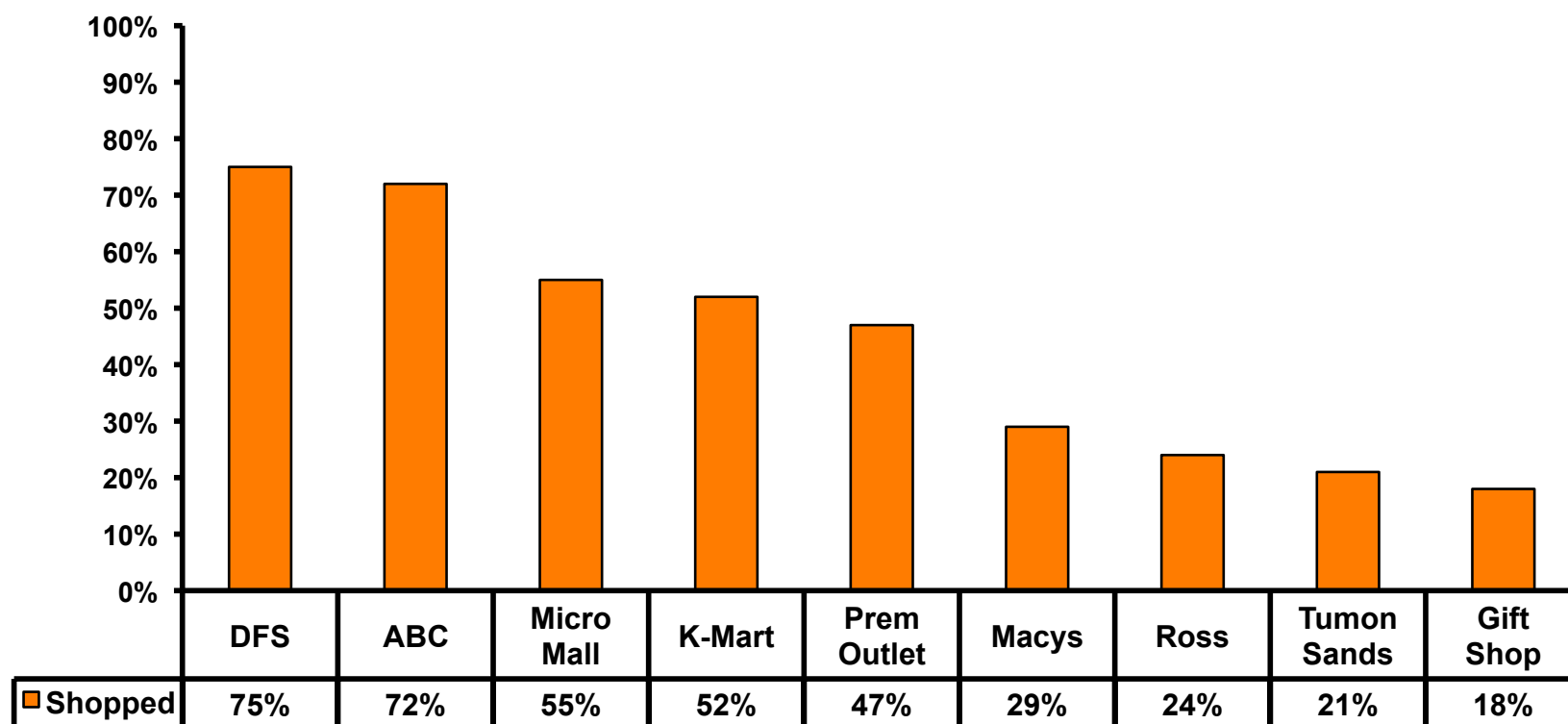
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

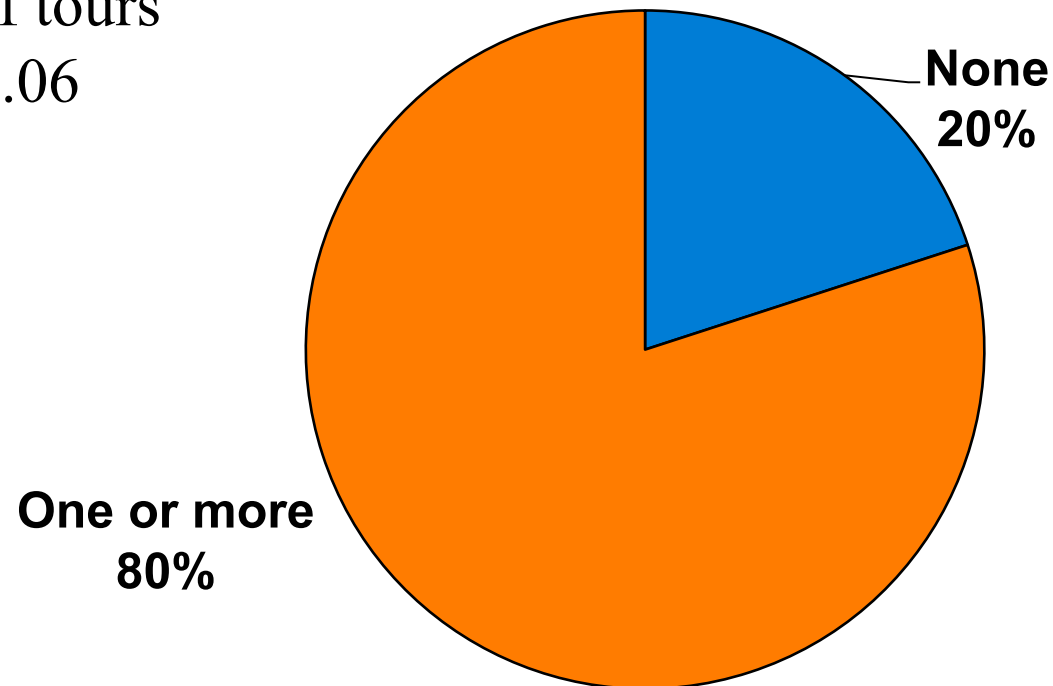
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 38%	Score of 6 to 7 = 34%
Score of 4 to 5 = 51%	Score of 4 to 5 = 52%
Score 1 to 3 = 11%	Score 1 to 3 = 14%
MEAN = 5.01	MEAN = 4.78

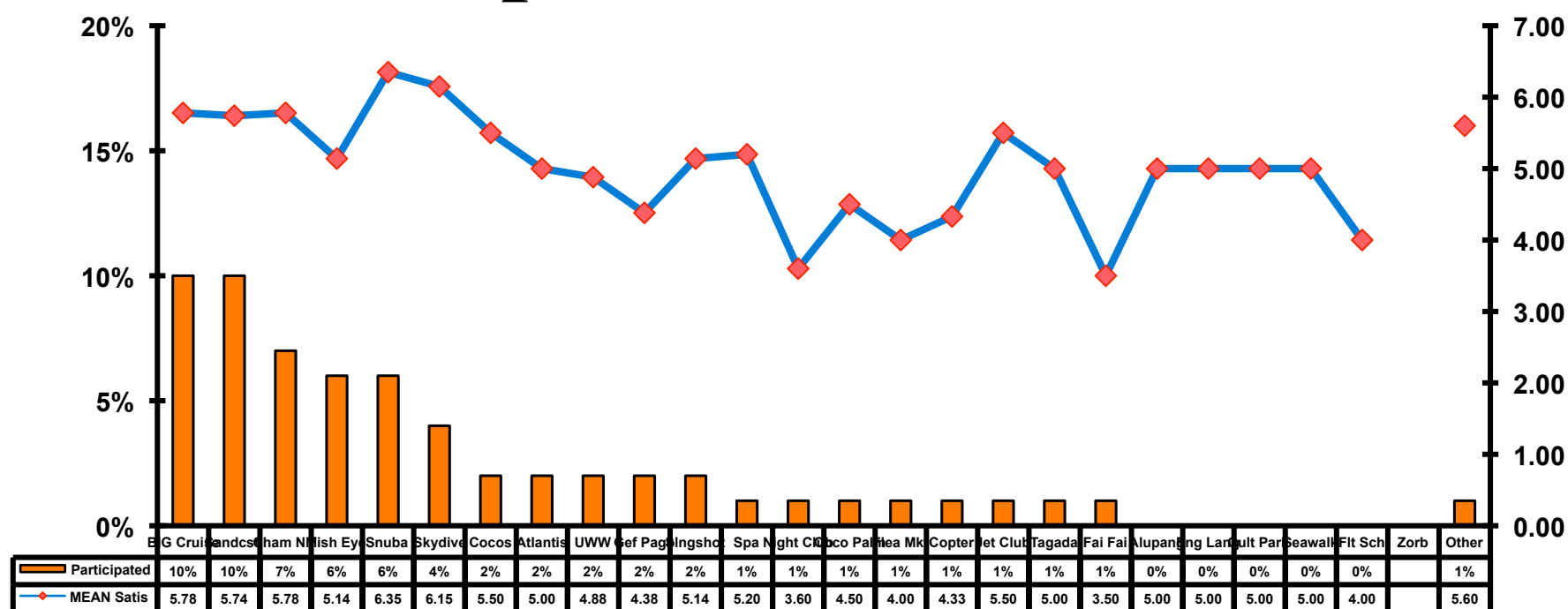
Optional Tour Participation

- Average number of tours participated in is 2.06



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 = 38%	Score of 6 to 7 = 31%
Score of 4 to 5 = 53%	Score of 4 to 5 = 54%
Score 1 to 3 = 8%	Score 1 to 3 = 15%
MEAN = 5.01	MEAN = 4.72

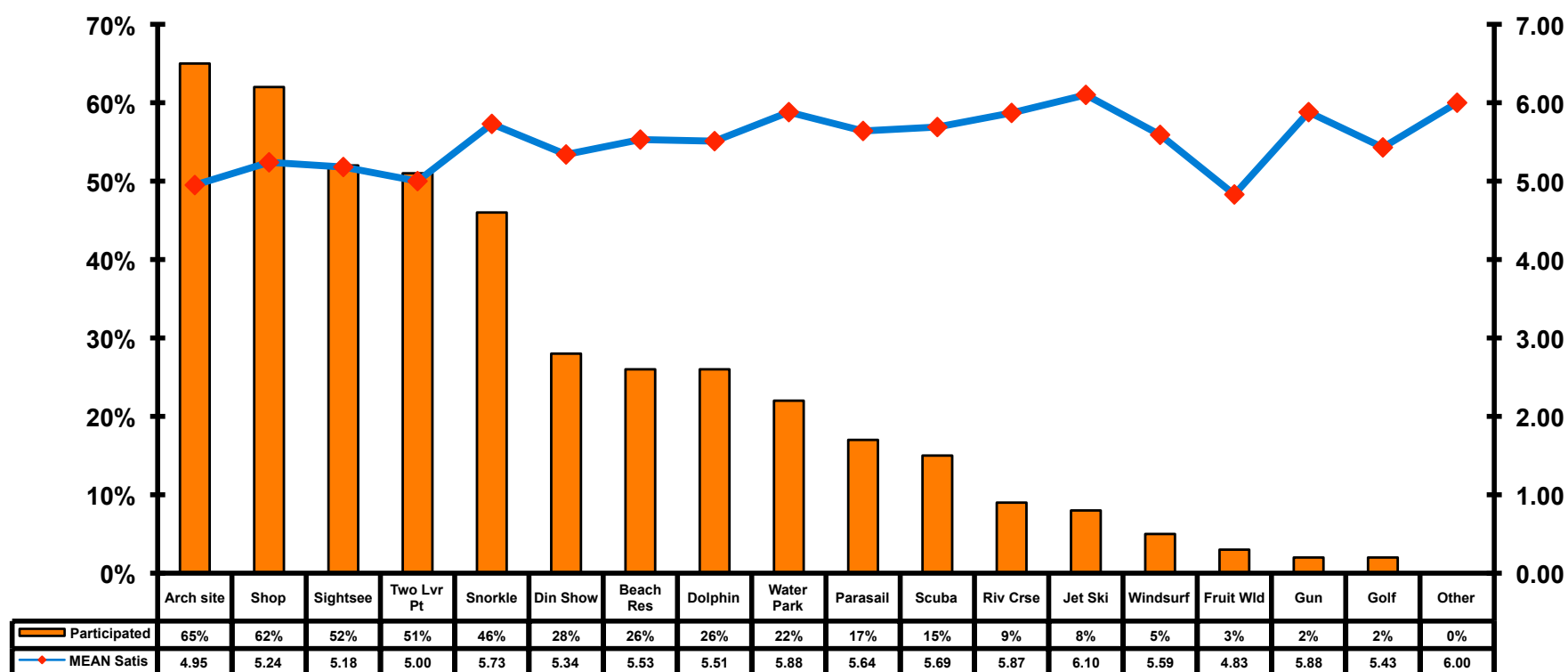
Night Tours Satisfaction

7pt Rating Scale

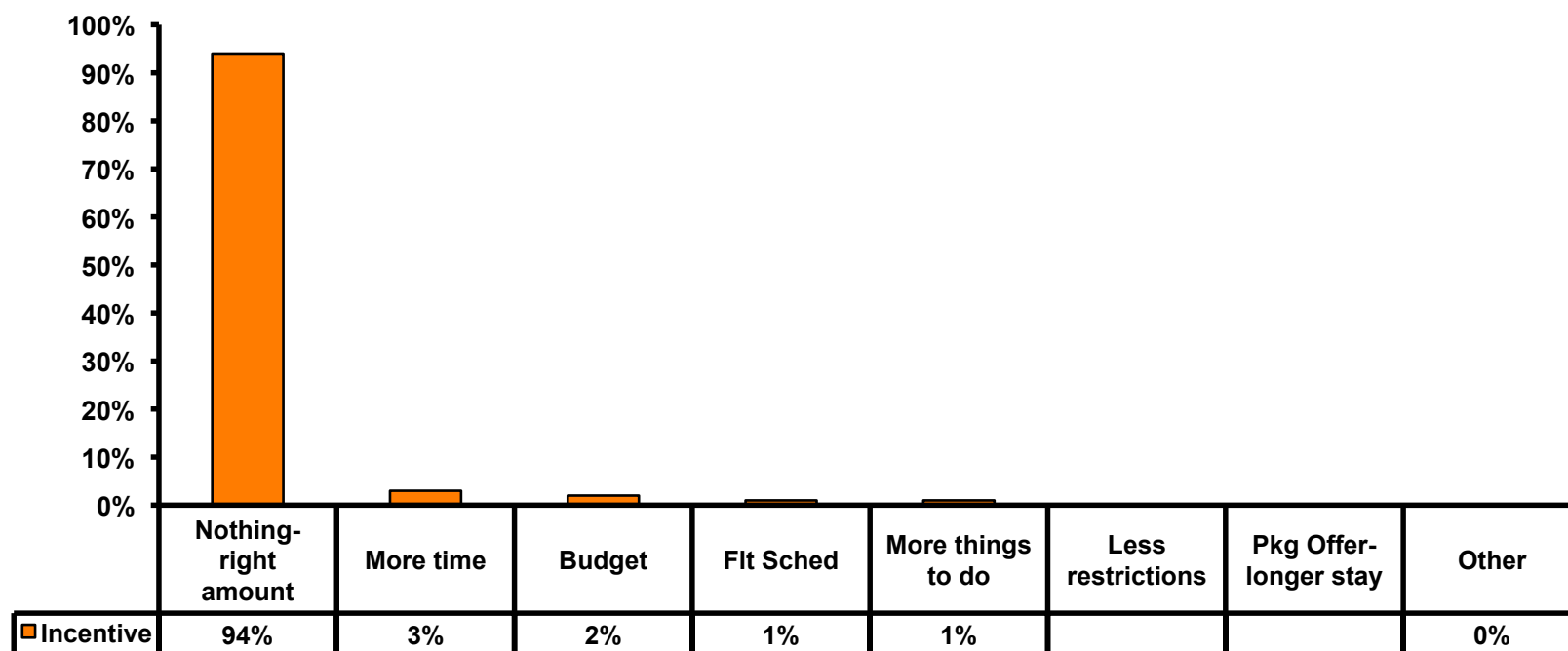
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 22%	Score of 6 to 7 = 23%
Score of 4 to 5 = 59%	Score of 4 to 5 = 57%
Score 1 to 3 = 19%	Score 1 to 3 = 22%
MEAN = 4.43	MEAN = 4.33

Satisfaction with Other Activities



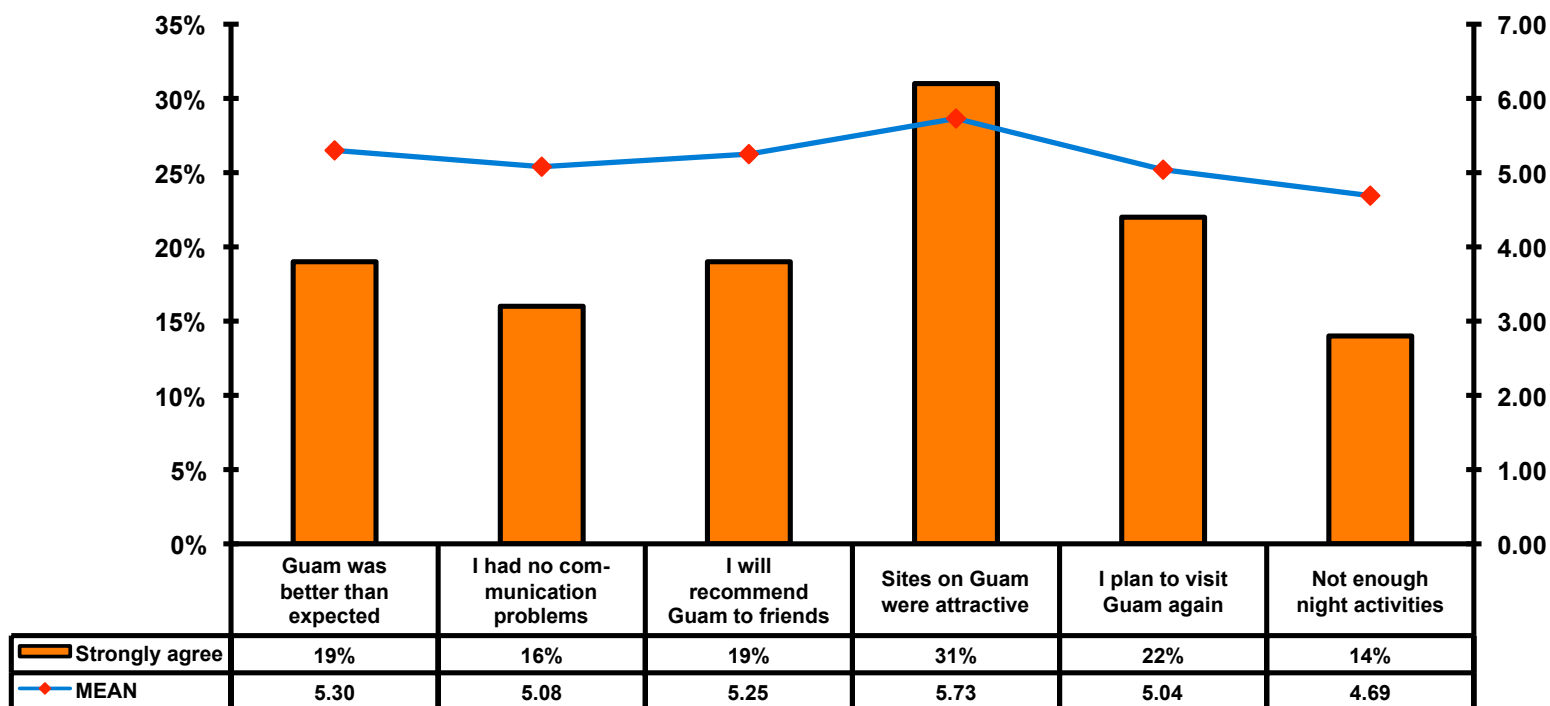
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

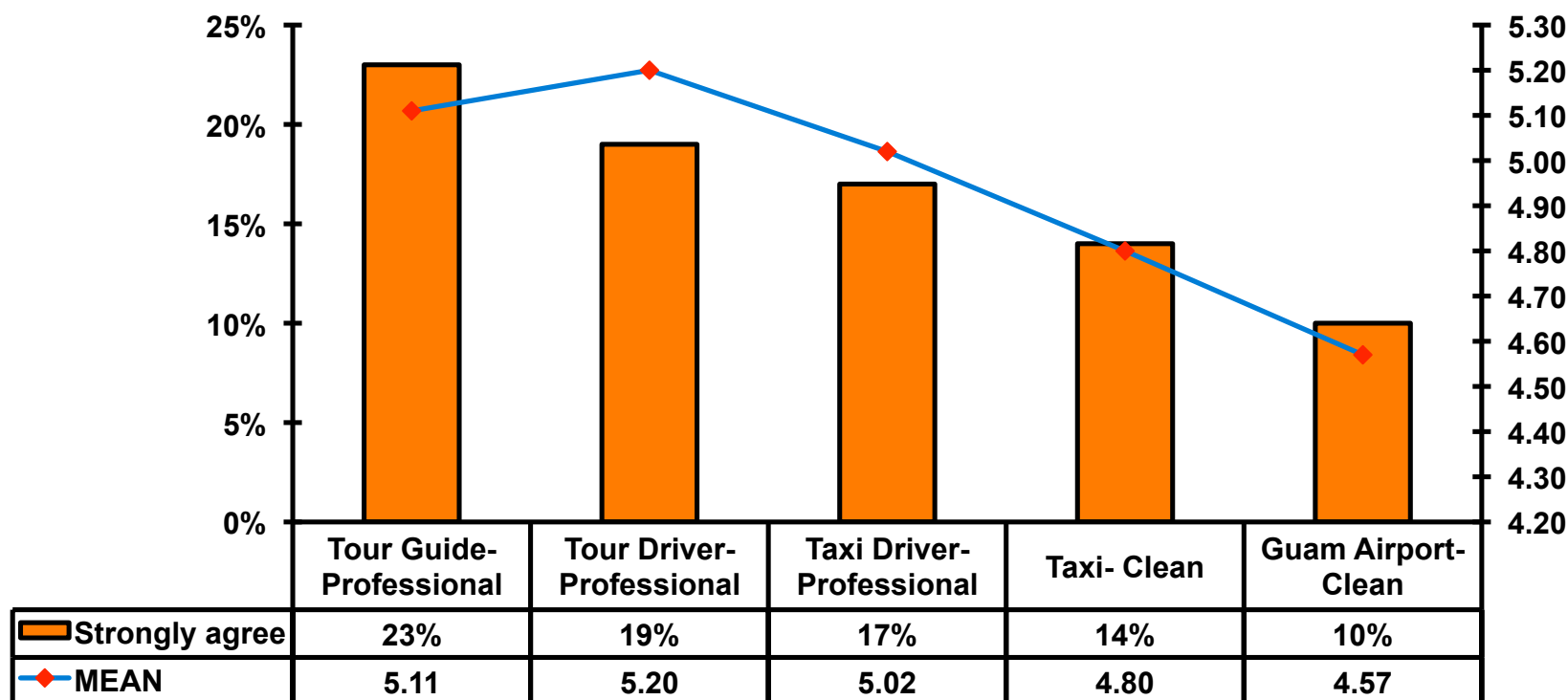
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

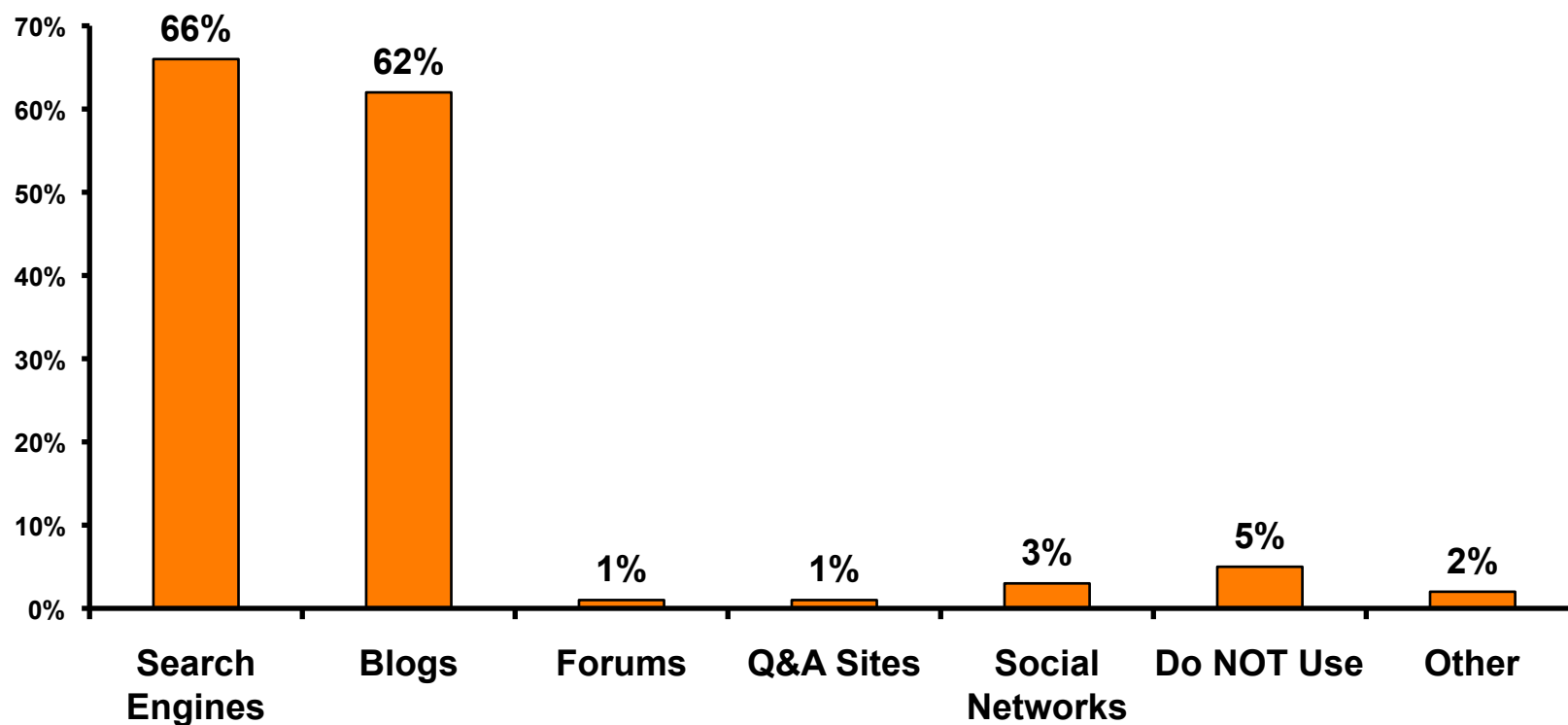
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



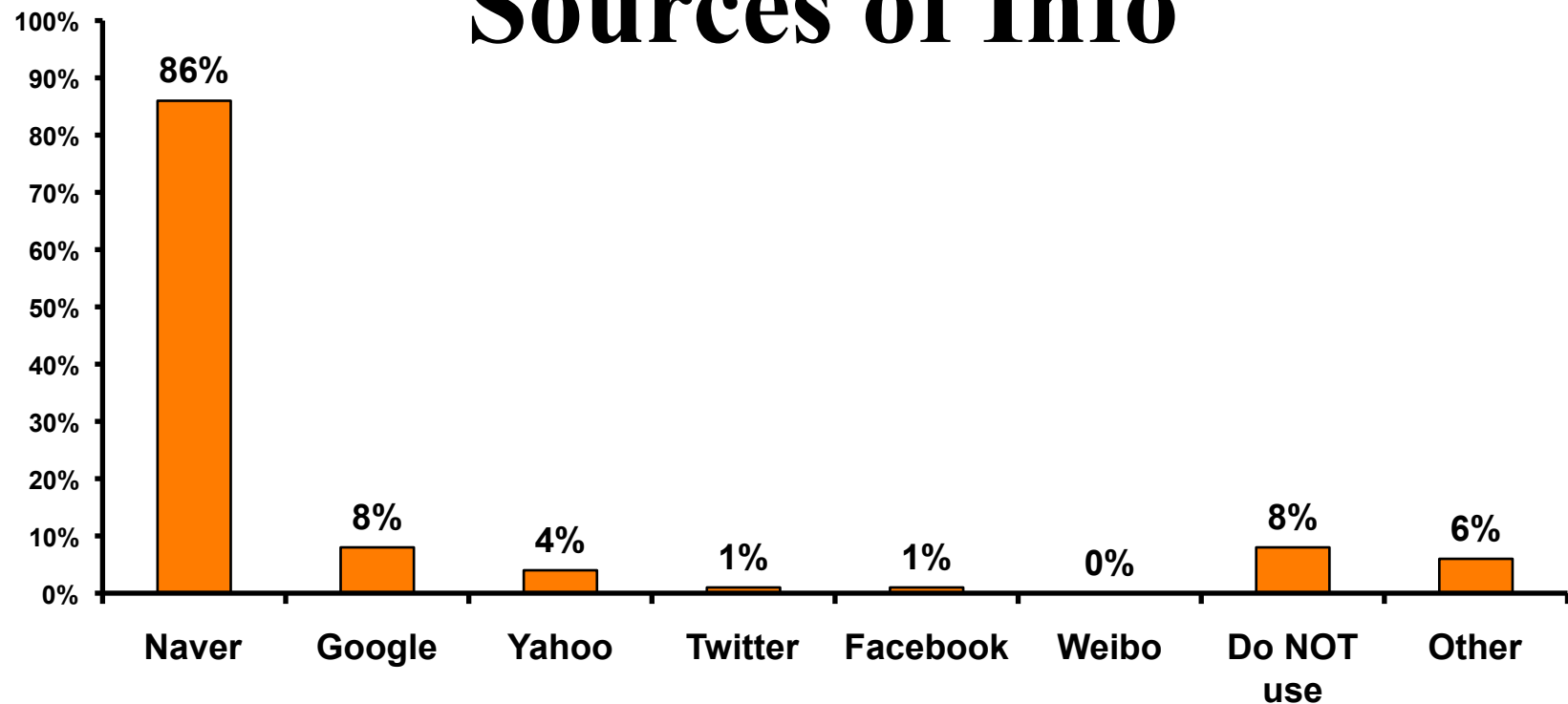
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

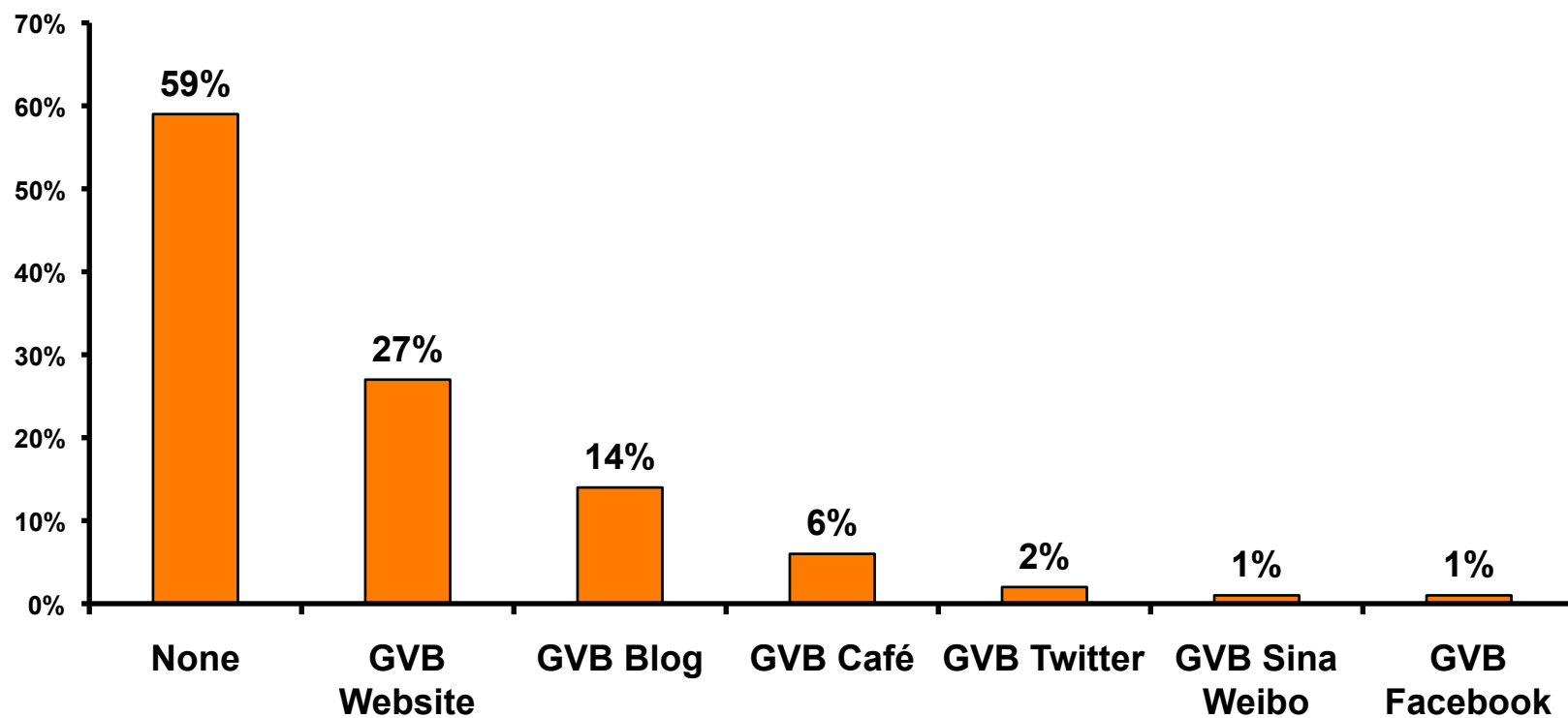


Internet- Things To Do

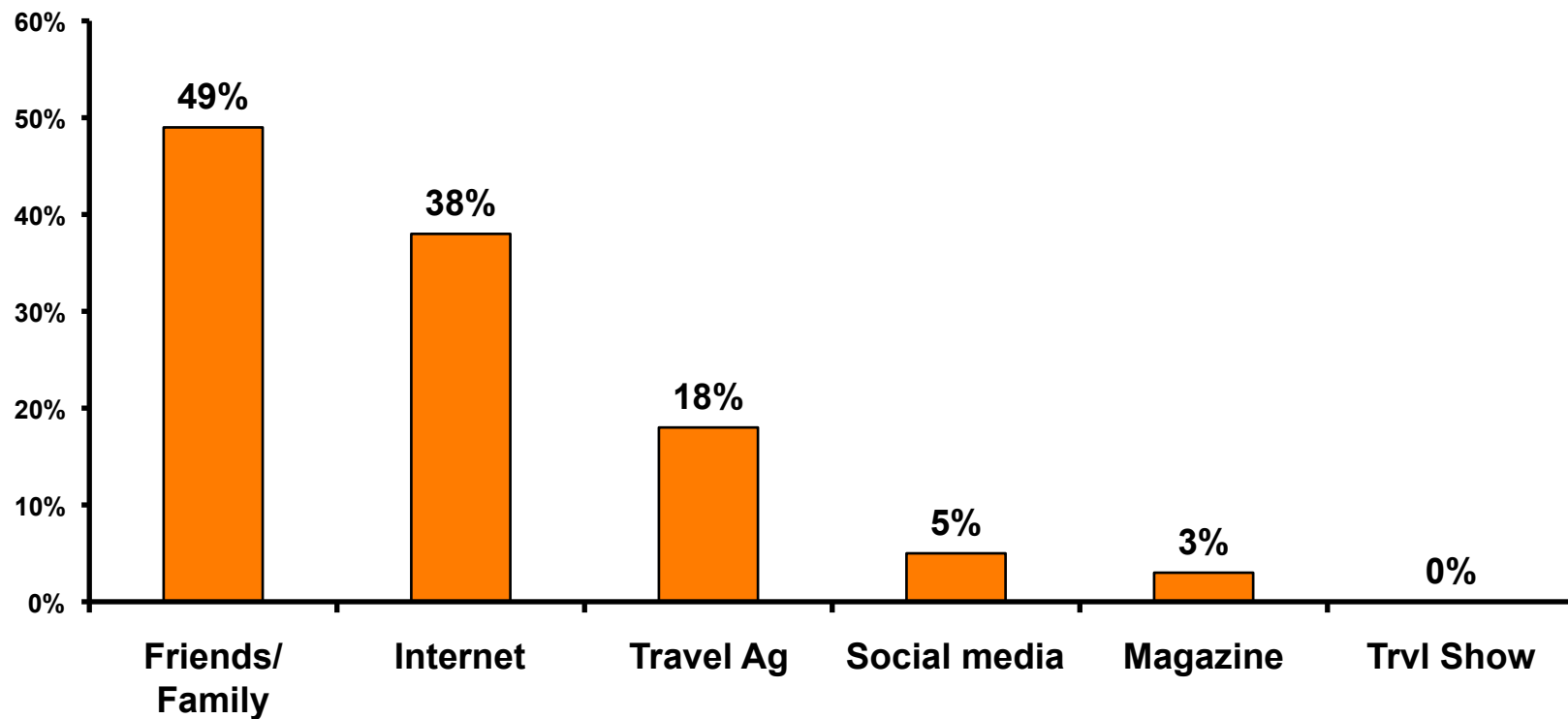
Sources of Info



Internet- GVB Sources

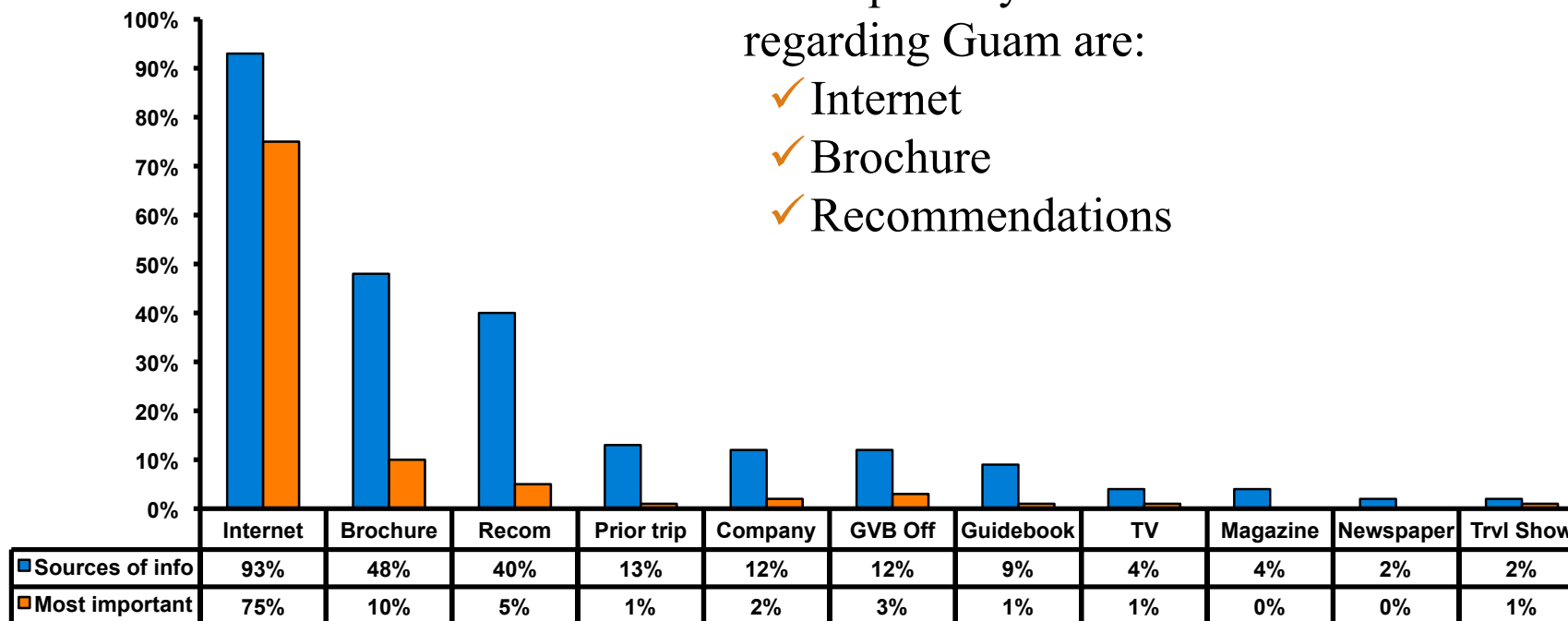


Travel Motivation- Info Sources



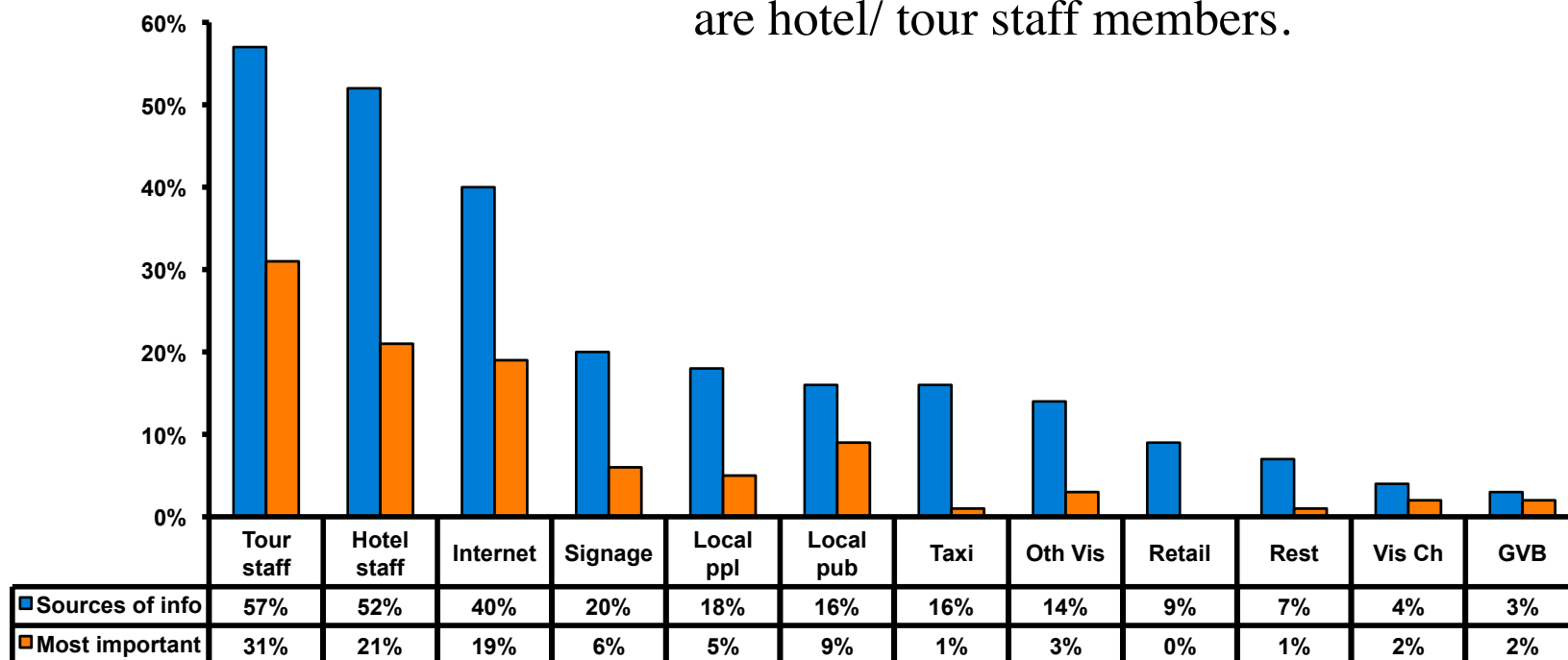
Sources of Information Pre-arrival

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



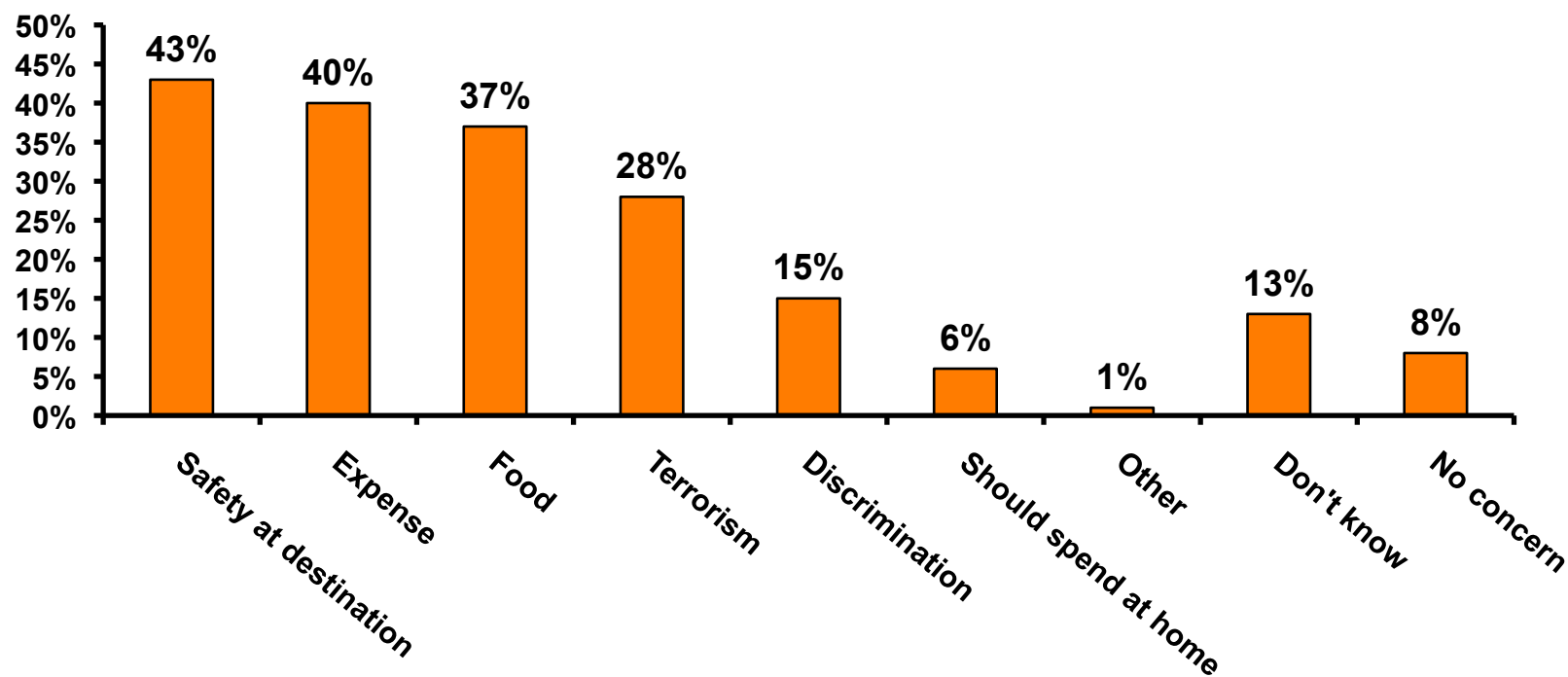
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

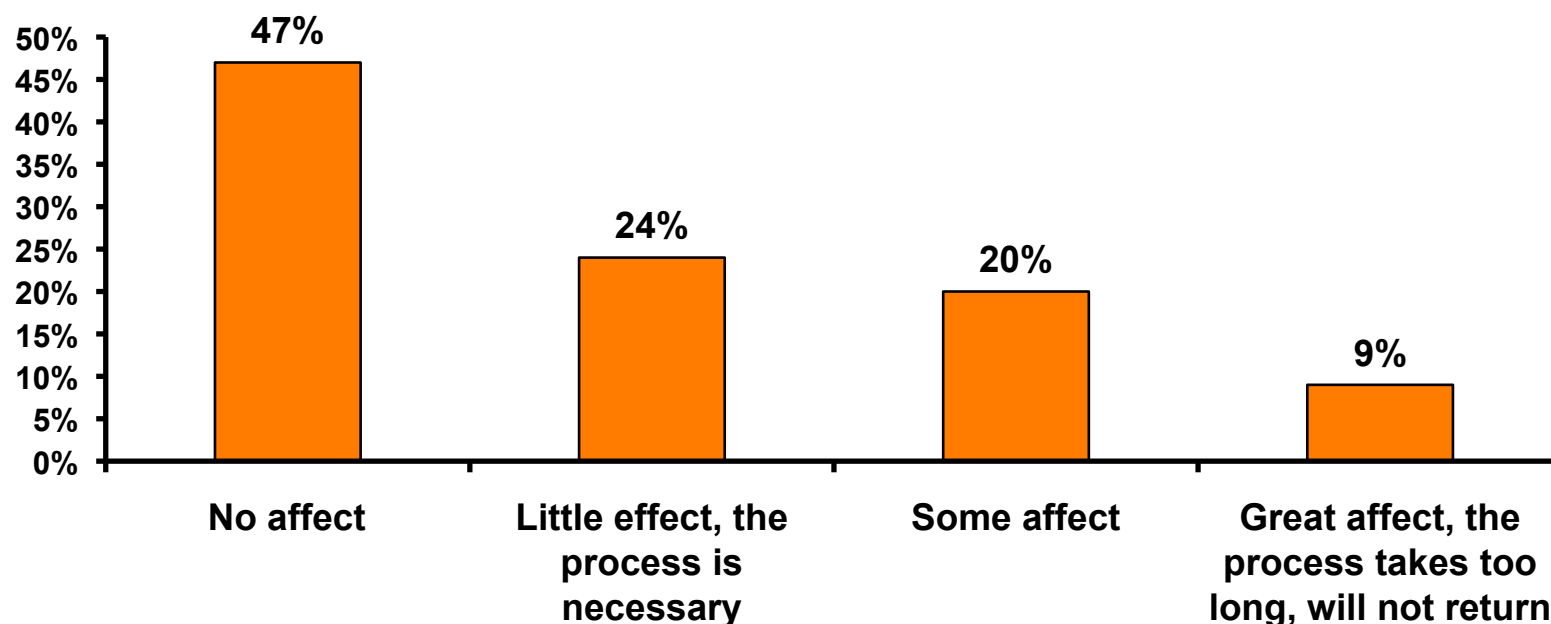
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26							
		-	18-24	25-34	35-49	50+	<KW12.0M	KW12.0M- KW24.0M	KW24.0M- KW36.0M	KW36.0M- KW48.0M	KW48.0M- KW60.0M	KW60.0M- KW72.0M	KW72.0M+	No Income
Q21	Safety	43%	11%	42%	47%	42%		44%	34%	51%	43%	52%	57%	89%
	Expense	40%	56%	40%	41%	25%	75%	44%	50%	40%	46%	48%	39%	33%
	Food	37%	44%	38%	33%	50%	50%	44%	33%	45%	41%	30%	41%	33%
	Terrorism	28%	22%	27%	27%	25%	50%	39%	21%	21%	30%	30%	33%	33%
	Discrimination against Koreans	15%	11%	14%	17%	17%	50%	22%	21%	11%	11%	13%	14%	11%
	Don't know	13%	11%	13%	15%	8%		11%	10%	6%	7%	9%	9%	
	No concerns	8%	11%	9%	7%	8%		6%	9%	6%	11%	13%	8%	11%
	Should spend at home	6%	11%	6%	4%	8%		11%	3%		9%	4%	8%	11%
	Other	1%		2%	1%				2%	4%			1%	
	Total	Count	345	9	187	135	12	4	18	58	53	46	23	90

Security Screening/ Immigration Process at Guam International Airport



Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree

