



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2014

OCTOBER 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.

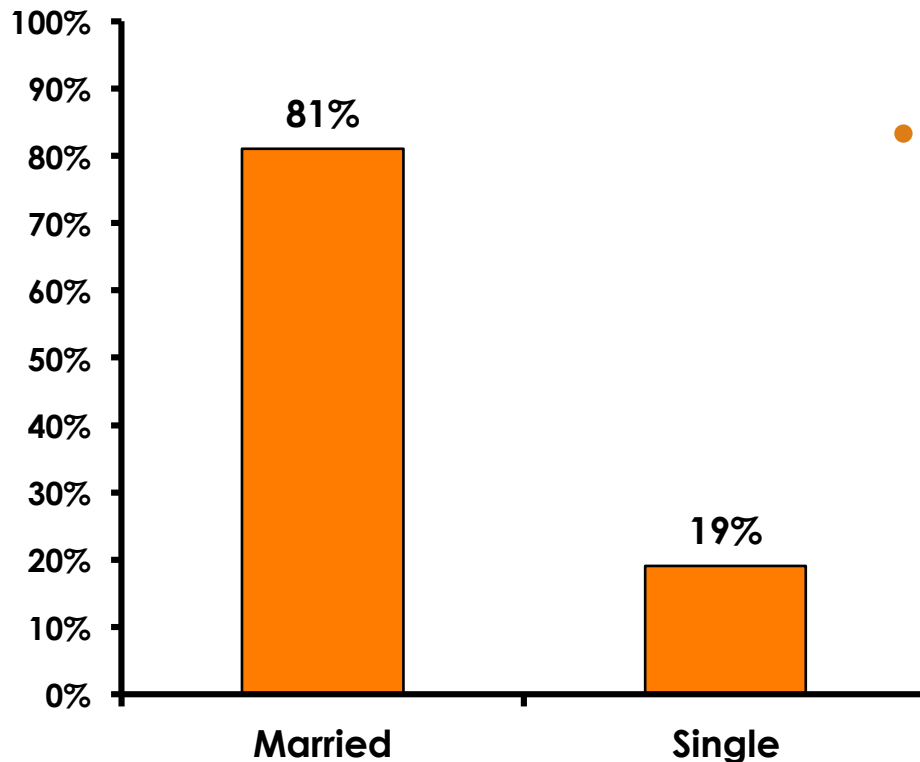
Objectives

- 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

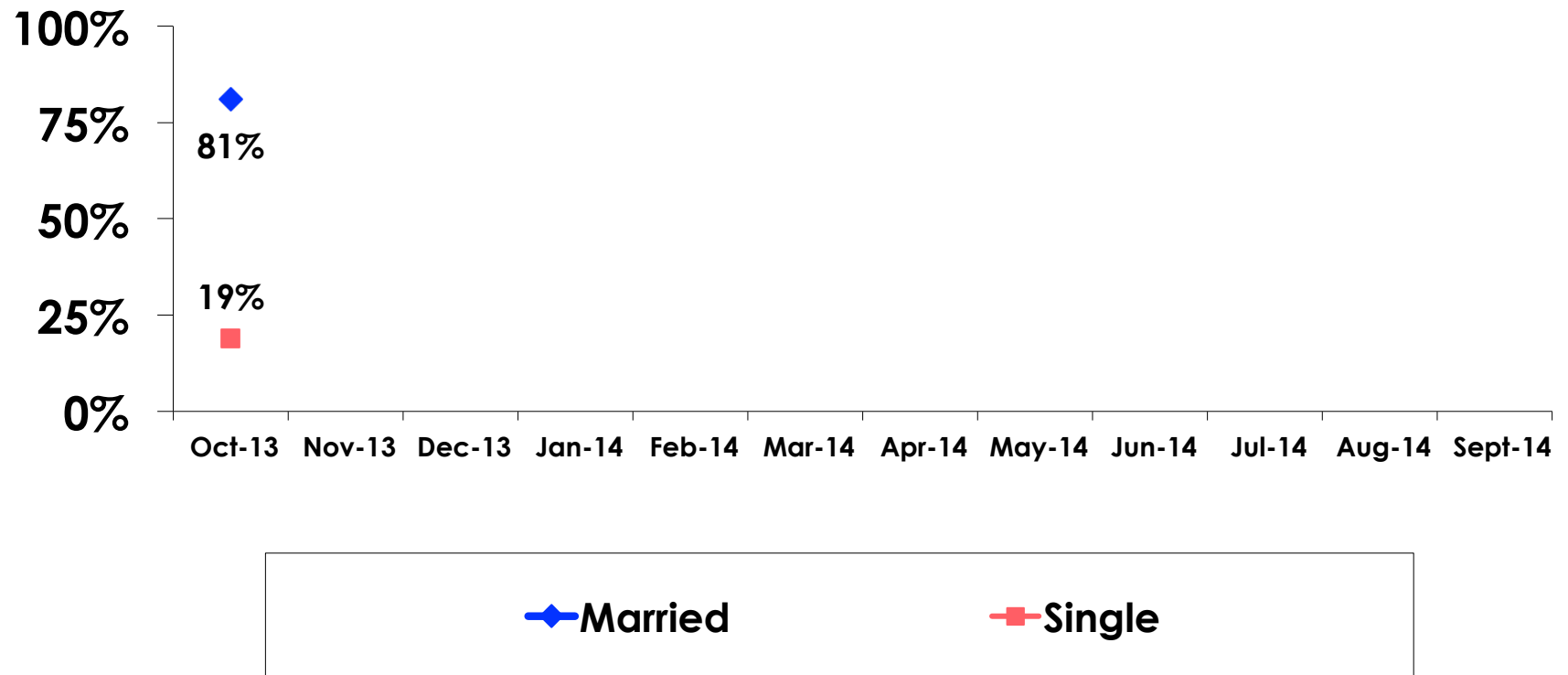
PROFILE OF RESPONDENTS

Marital Status - Overall

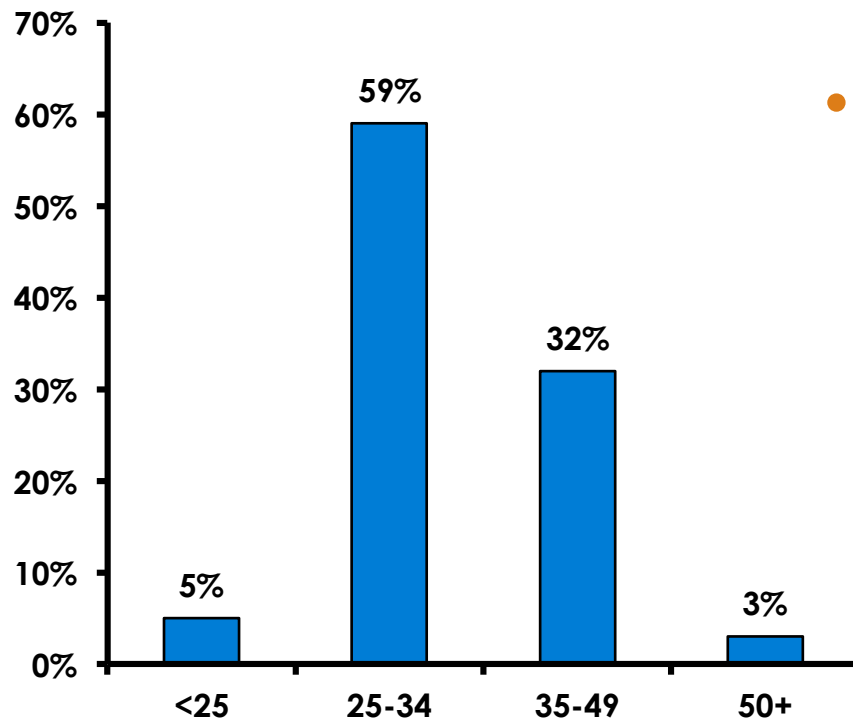


- Majority of Korean visitors are married.

Marital Status

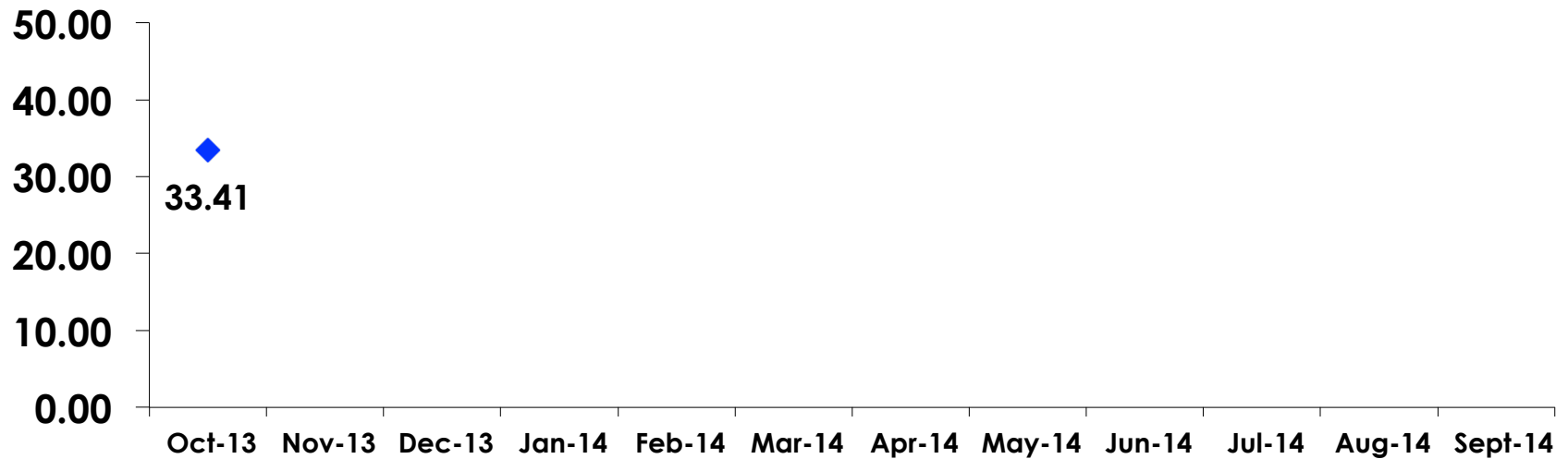


Age - Overall

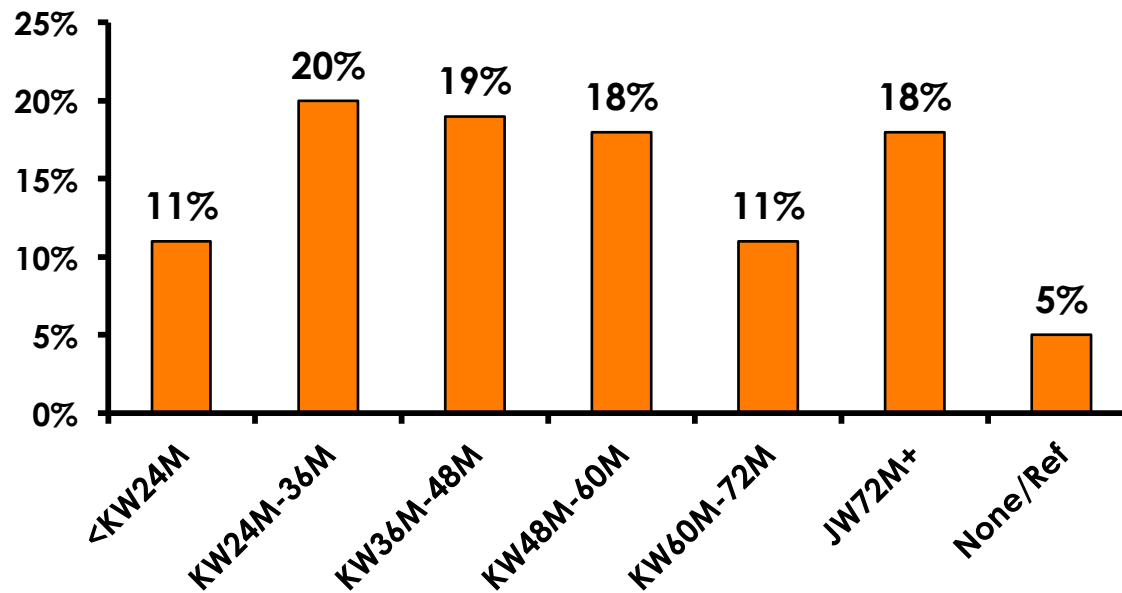


- The average age of the respondents is 33.41 years of age.

Average Age

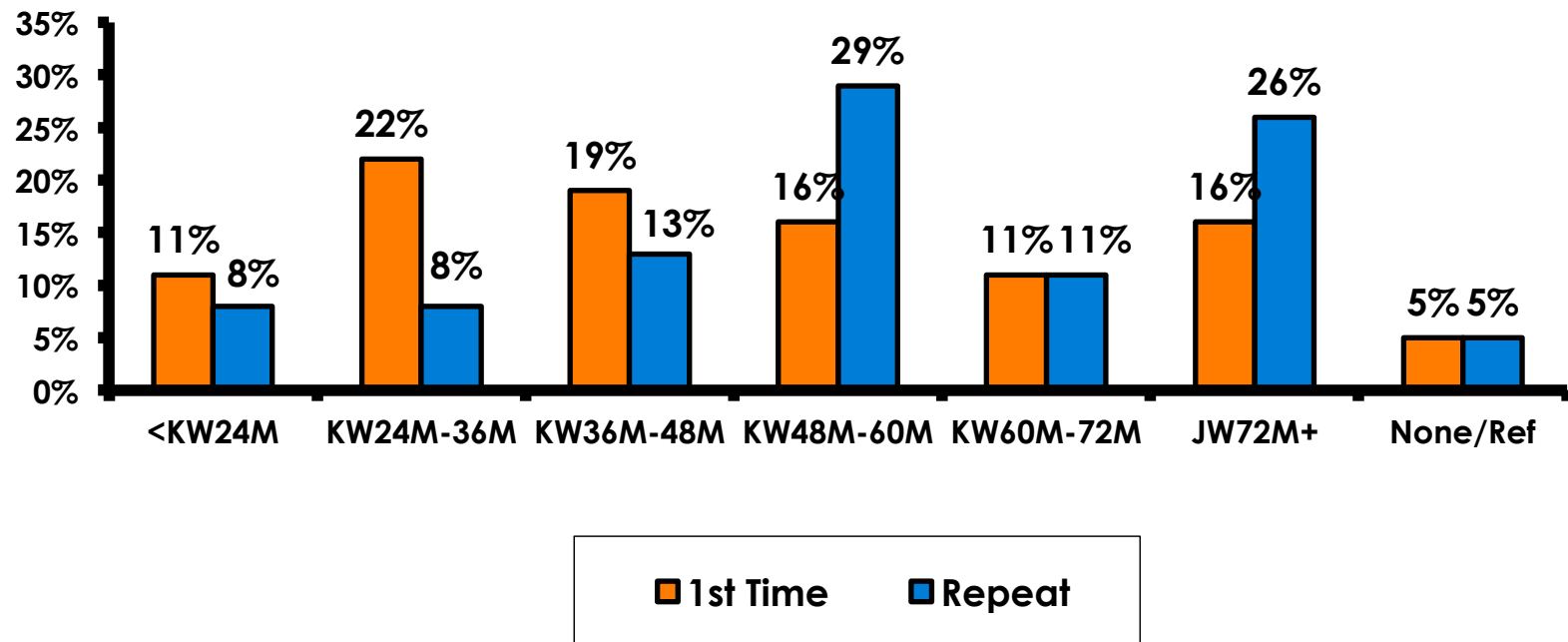


Personal Income



• KW1,058.39=\$1

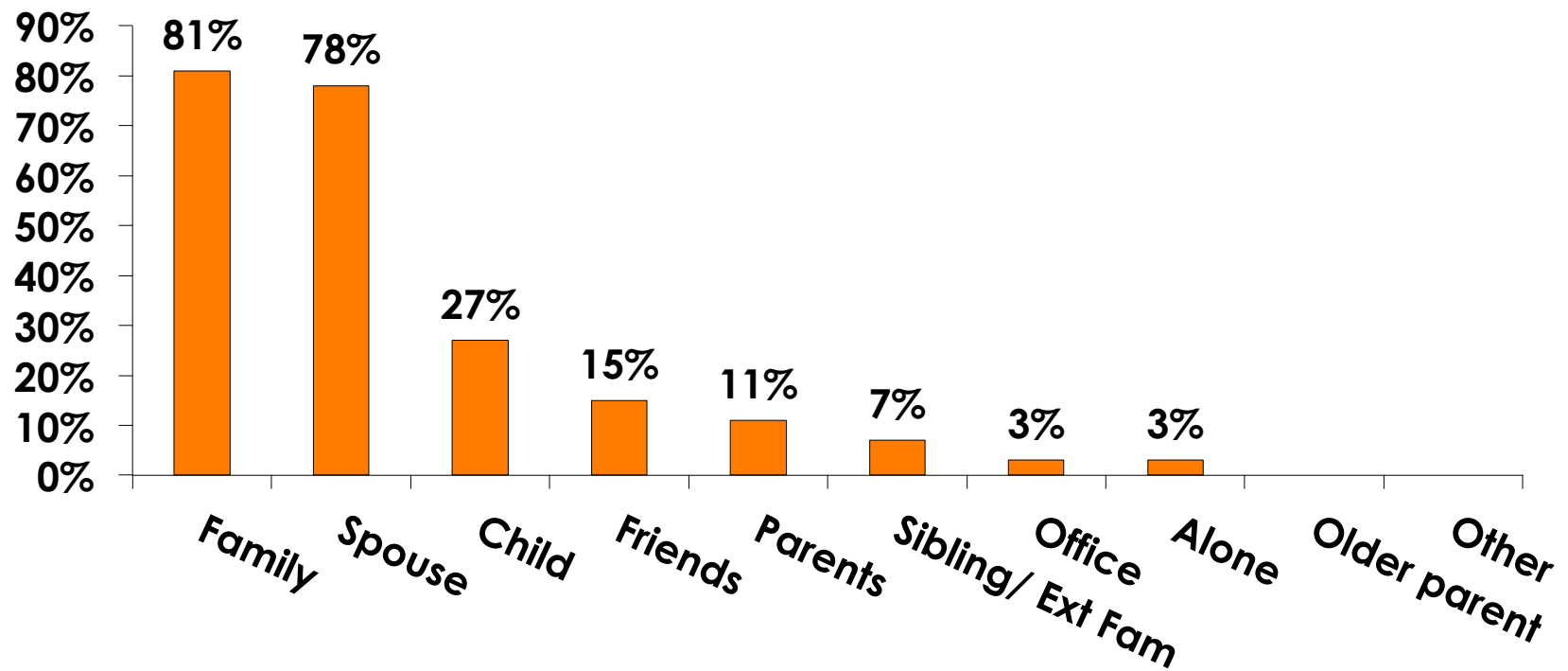
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	8	3	5	1	3	1	3
		Column N %	3%	2%	3%	8%	2%	1%	38%
	KW12.0M-KW24.0M	Count	24	9	15		20	3	1
		Column N %	8%	6%	10%		11%	3%	13%
	KW24.0M-KW36.0M	Count	64	29	35		51	12	
		Column N %	20%	18%	23%		27%	11%	
	KW36.0M-KW48.0M	Count	59	30	27	3	40	15	
		Column N %	19%	19%	18%	25%	21%	14%	
	KW48.0M-KW60.0M	Count	56	34	22	2	26	26	2
		Column N %	18%	21%	14%	17%	14%	24%	25%
	KW60.0M-KW72.0M	Count	35	19	16	1	19	15	
		Column N %	11%	12%	10%	8%	10%	14%	
	KW72.0M+	Count	56	33	23	1	22	31	2
		Column N %	18%	20%	15%	8%	12%	29%	25%
	No Income	Count	15	4	11	4	6	4	
		Column N %	5%	2%	7%	33%	3%	4%	
Total		Count	317	161	154	12	187	107	8

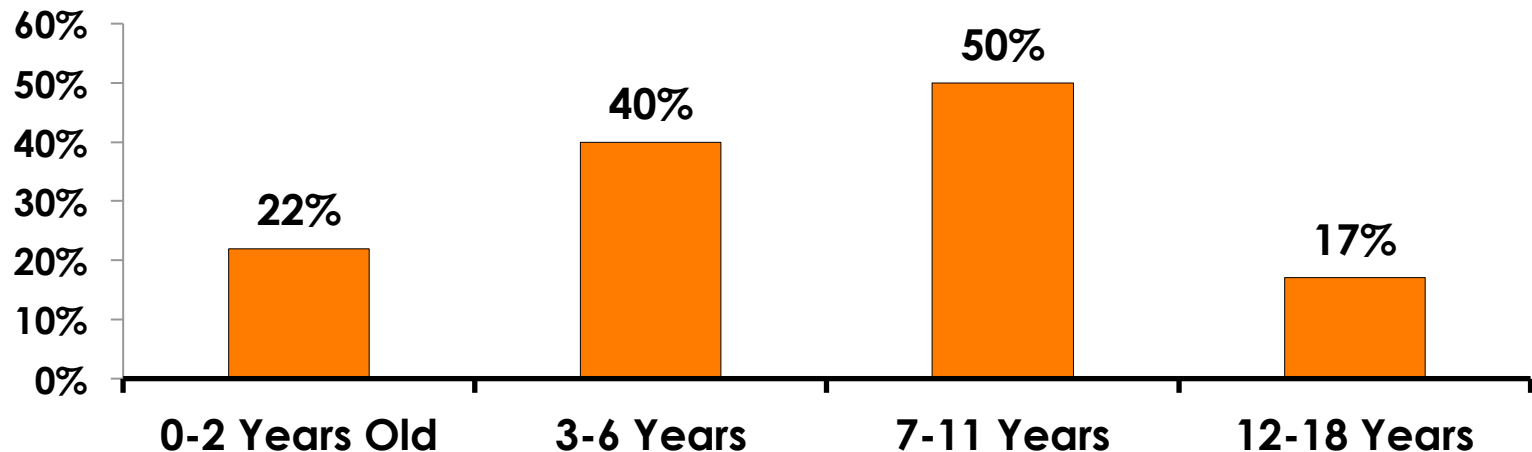
Travel Companions



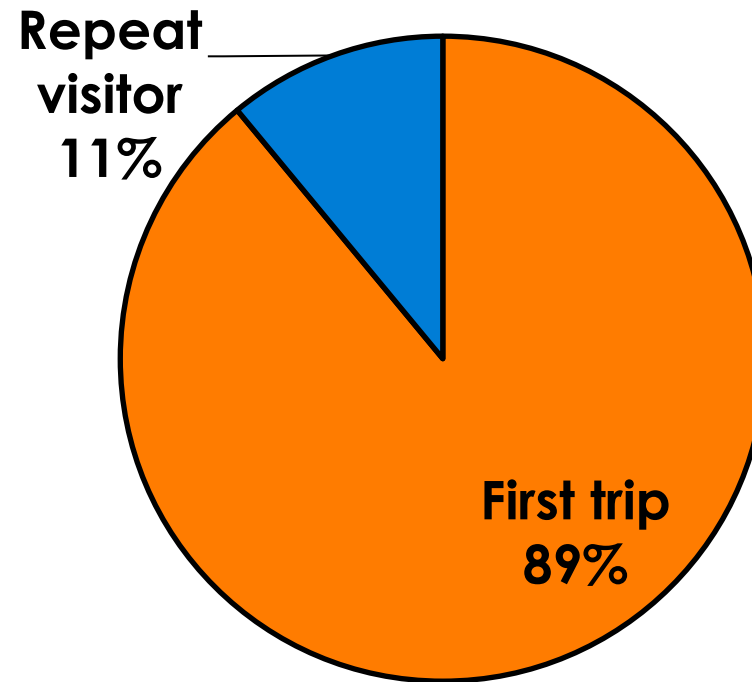
Number of Children Travel Party

N=96 total respondents traveling with children.

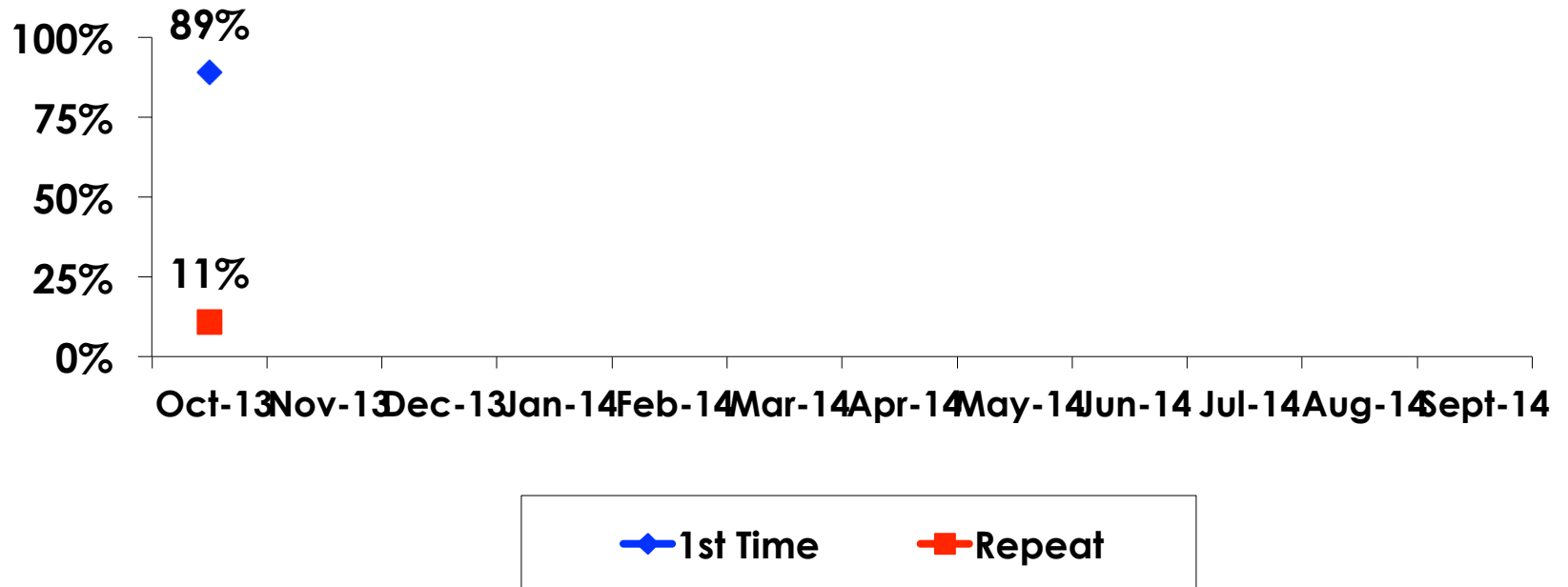
(Of those N=96 respondents, there is a total of 148 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



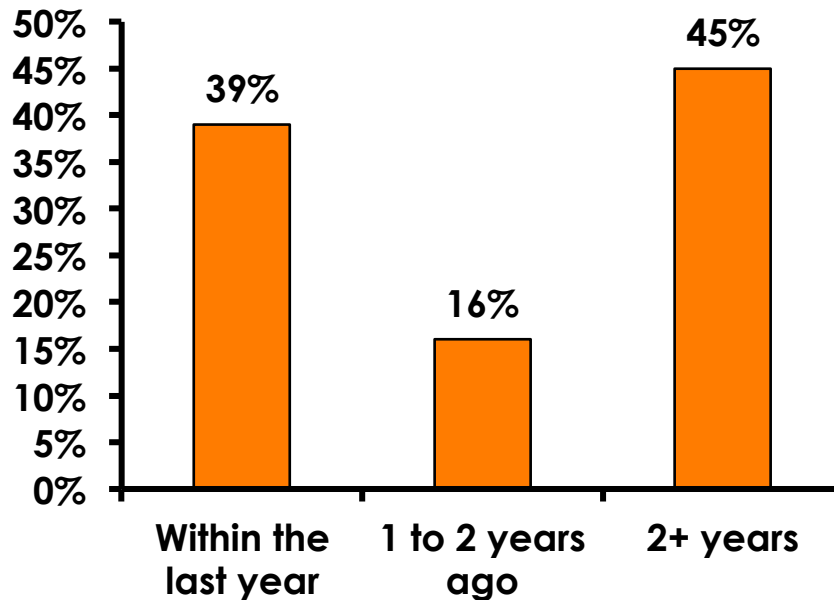
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	174	153	21
		Column N %	50%	50%	54%
	Female	Count	174	156	18
		Column N %	50%	50%	46%
AGE	Total	Count	348	309	39
	18-24	Count	18	17	1
		Column N %	5%	6%	3%
	25-34	Count	205	191	14
		Column N %	59%	62%	36%
	35-49	Count	111	90	21
		Column N %	32%	29%	54%
	50+	Count	12	9	3
		Column N %	3%	3%	8%
	Total	Count	346	307	39

- 1ST time visitors tend to be younger on average

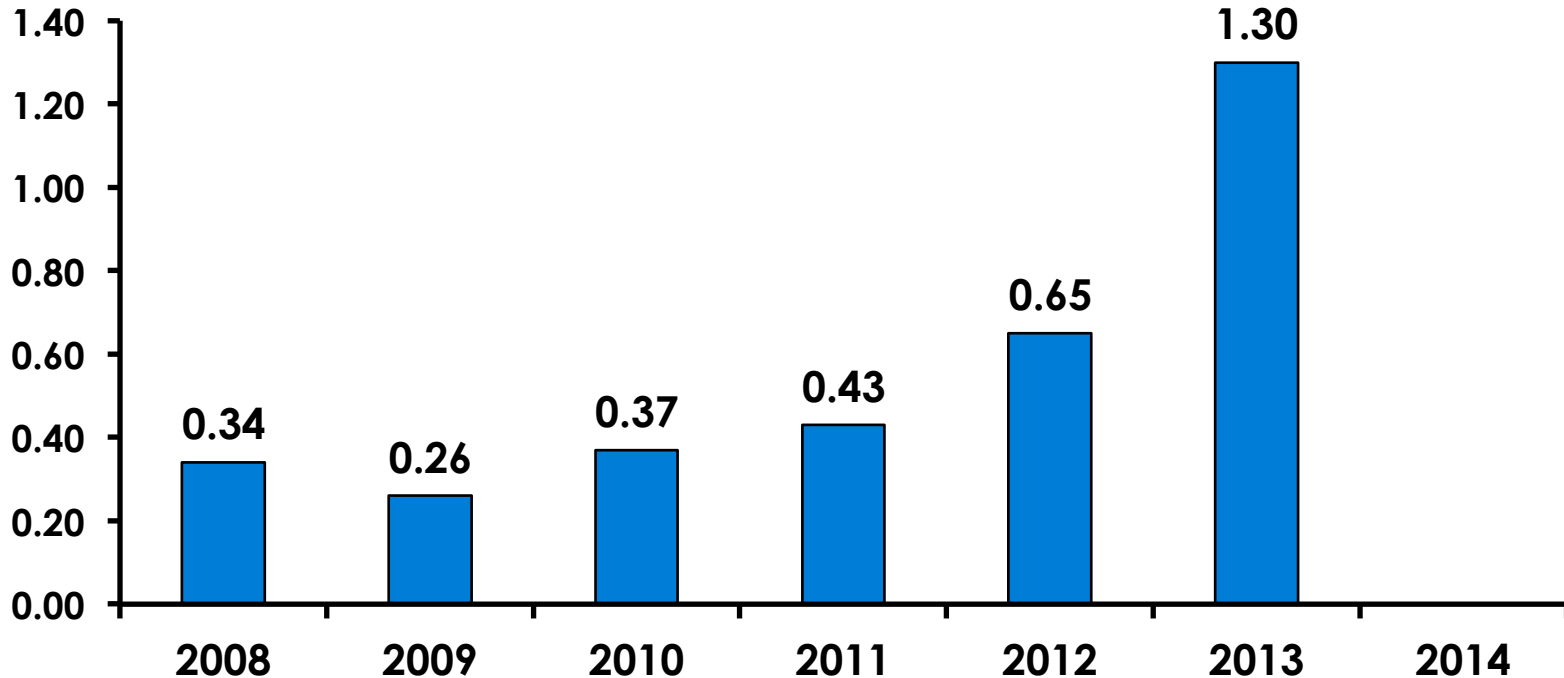
Repeat Visitors Last Trip

n = 38



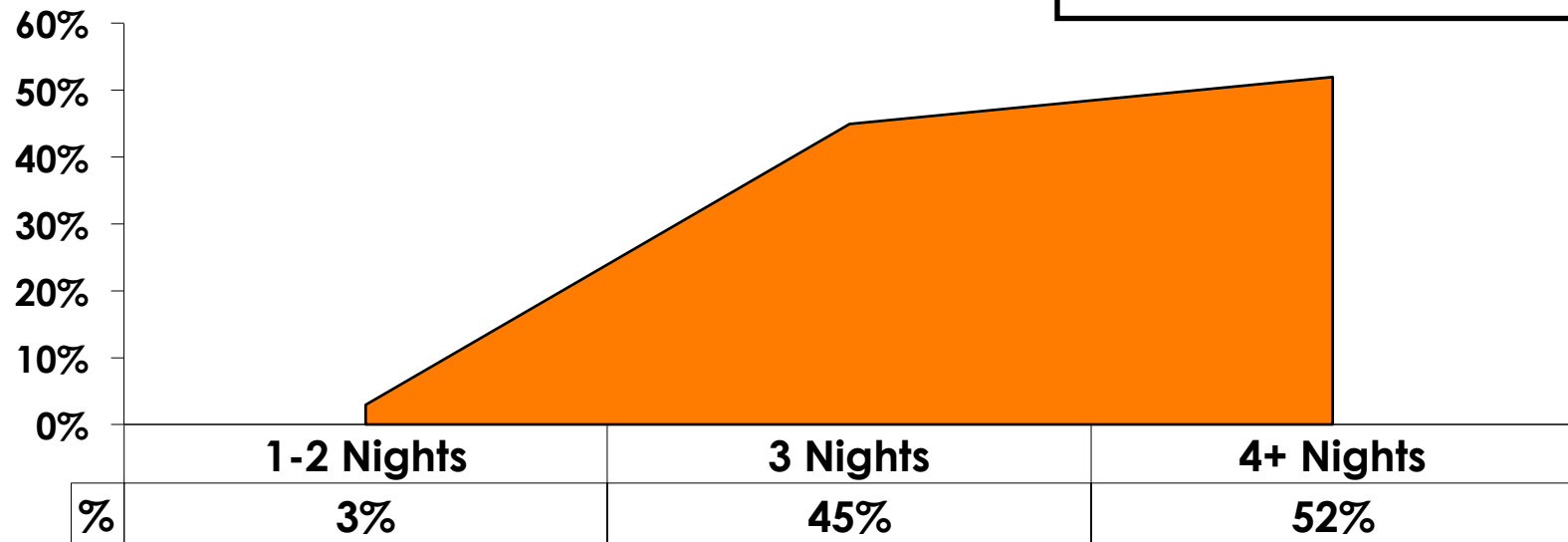
- The average repeat visitor has been to Guam 2.79 times.
- Half of repeat visitors have been here within the last year.

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

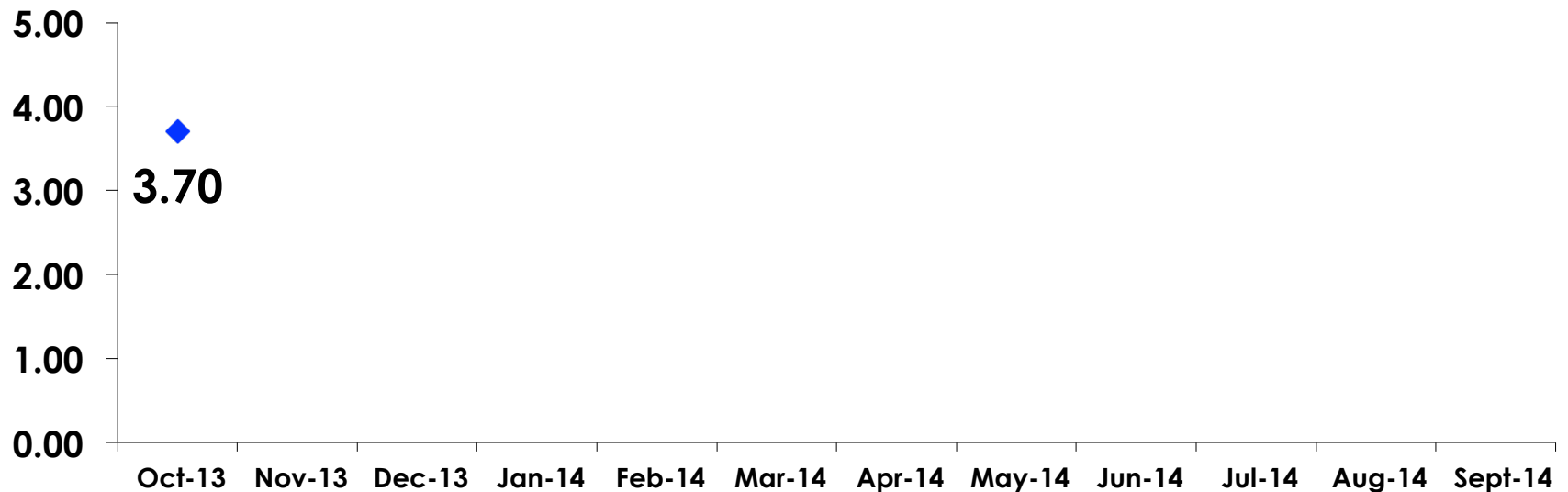


Length of Stay

Mean = 3.70 Days
Median = 4.0 Days



Average Length of Stay

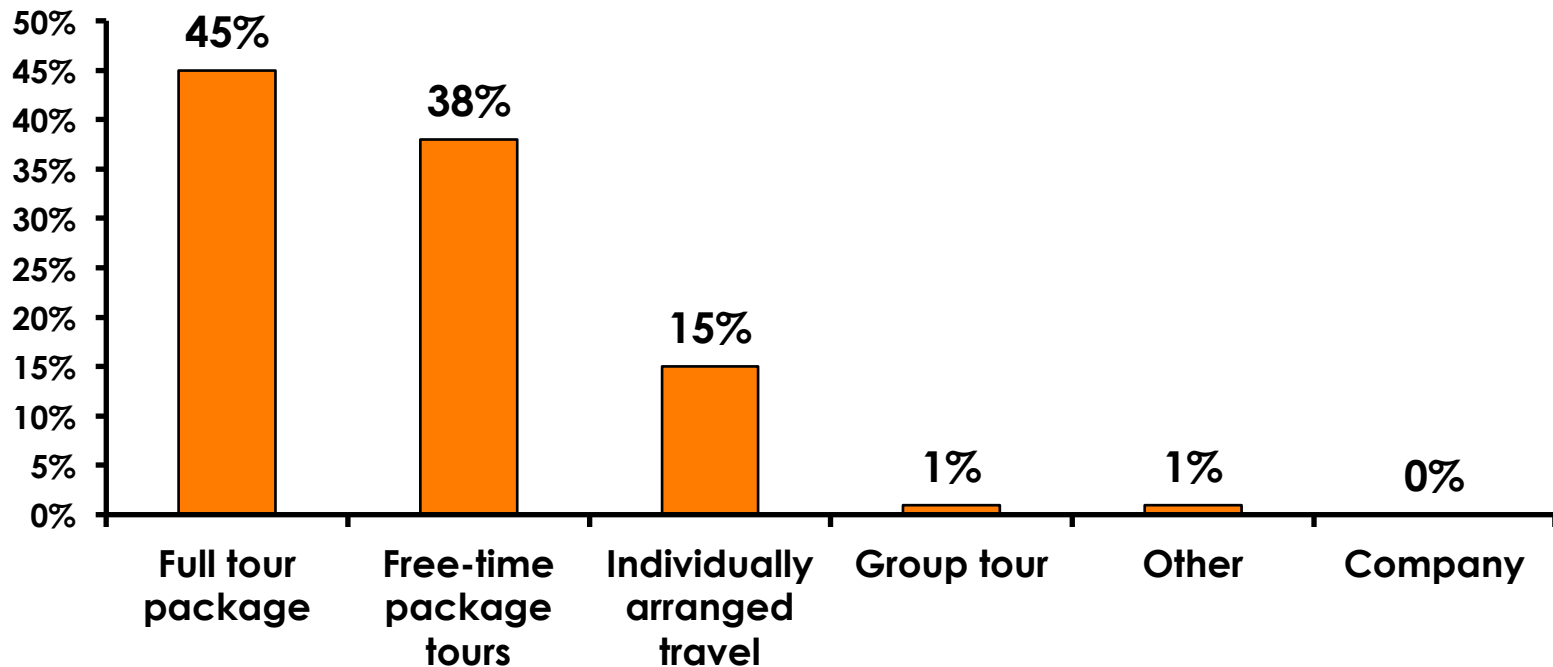


Occupation by Income

		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	25%		46%	23%	19%	32%	32%	25%	7%
	Self-employed	17%	25%	8%	17%	8%	23%	18%	29%	7%
	Professional/ Specialist/ Tech	14%	13%	13%	17%	17%	16%	9%	14%	
	Housewife/ Homemaker	12%	13%	4%	11%	10%	11%	15%	11%	40%
	Professor/ Teacher/ After-school	5%	13%	13%	9%	5%		3%	7%	
	Service worker/ Private hse worker	5%		13%	9%	7%	2%			
	Student	5%	25%			3%	2%		4%	27%
	Unemployed	3%	13%	4%	5%	3%				20%
	Freelancer	3%			5%	5%	2%	3%	4%	
	Manager/ Admin	3%			2%	3%	4%	9%	2%	
	Sales worker/ Clerical	2%				7%	2%	6%		
	Skilled worker	2%			2%	3%	4%	3%		
	Other	2%				3%		3%	2%	
	Govt- Manager	1%					4%		2%	
	Govt- office worker non-mgr	1%				3%			2%	
	Govt- Executive	0%				2%				
	Total	Count	332	8	24	64	59	56	34	56

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

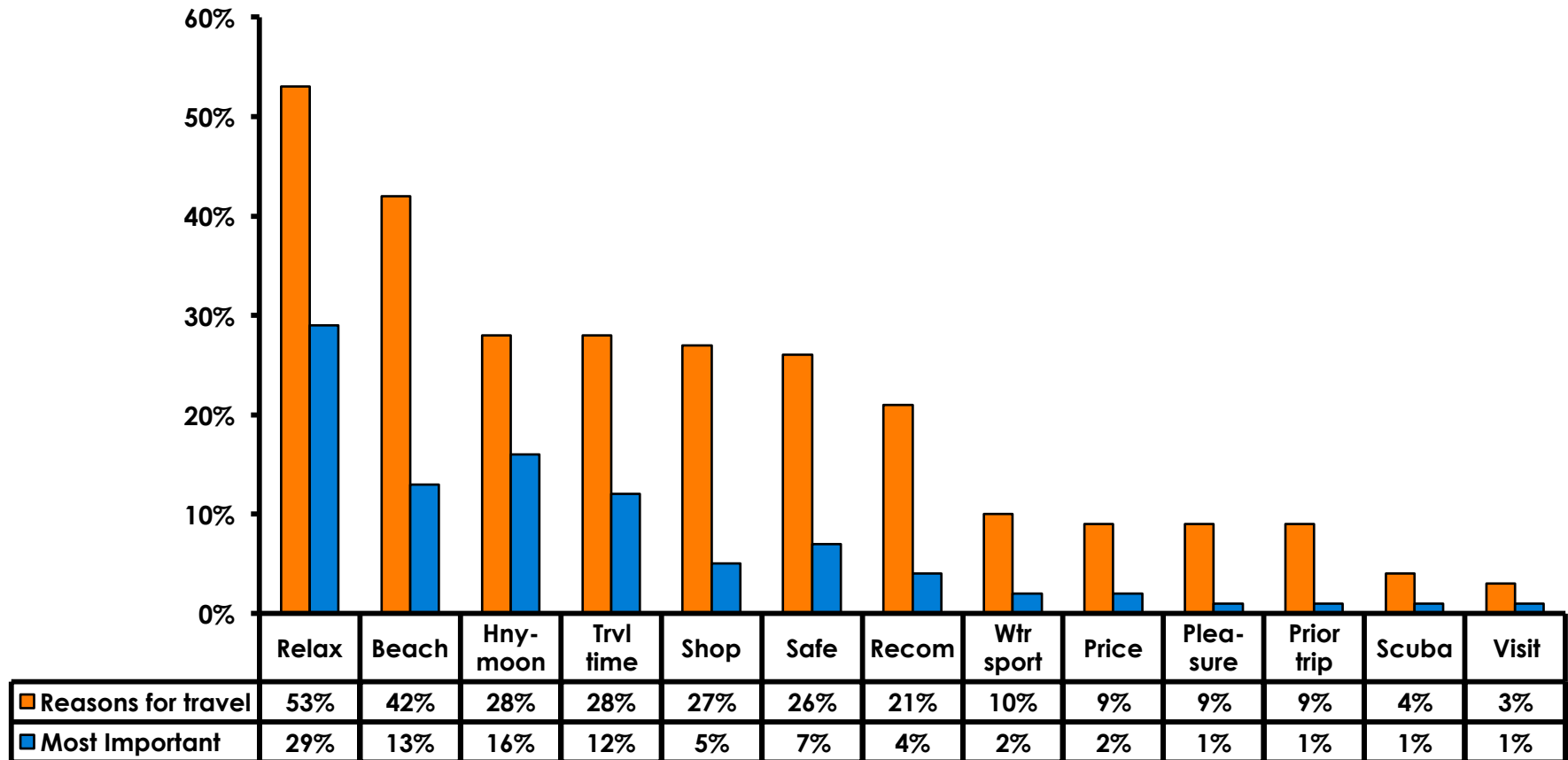


Accommodation by Income

Average length of stay: 3.70 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	39%	50%	8%	34%	34%	52%	43%	45%	40%	
	Hyatt Regency Guam	15%	25%	17%	14%	19%	11%	11%	14%	20%	
	Sheraton Laguna Guam	12%	13%	13%	14%	20%	11%	9%	5%	13%	
	Hilton Guam Resort	8%		13%	13%	10%	5%	6%	7%		
	Outrigger Guam Resort	6%		13%	6%	3%		3%	11%	7%	
	Hotel Nikko Guam	5%		17%	8%		5%	9%		7%	
	Westin Resort Guam	5%		4%		8%	2%	11%	5%	7%	
	Holiday Resort Guam	3%		4%	6%	2%			4%		
	Onward Beach Resort	1%				2%	5%		2%		
	Fiesta Resort Guam	1%					4%	3%	2%		
	Royal Orchid Guam	1%		4%	2%	2%			2%		
	Home stay/ friend/ relative	1%		4%			2%				
	Guam Reef & Olive Spa	1%					2%				
	Leo Palace Resort	1%						3%		7%	
	Guam Marriott Resort	1%						3%	2%		
	Hotel Santa Fe	1%	13%	4%							
	Bayview Hotel	1%			3%						
	Pacific Bay Hotel	0%					2%				
	Guam Plaza Hotel	0%							2%		
	Total	Count	350	8	24	64	59	56	35	56	15

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	53%	44%	55%	52%	50%	51%	56%
	Natural beauty	42%	44%	42%	41%	50%	40%	44%
	Honeymoon	28%	44%	38%	10%		32%	24%
	Short travel time	28%	6%	31%	25%	33%	24%	32%
	Shopping	27%	22%	31%	23%	8%	28%	26%
	Safe	26%	22%	23%	33%	25%	29%	23%
	Recomm- friend/family/trvl agnt	21%	17%	17%	26%	33%	17%	24%
	Water sports	10%	22%	5%	16%		9%	10%
	Price	9%		11%	10%		10%	9%
	Pleasure	9%	17%	8%	10%	17%	10%	9%
	Previous trip	9%	6%	5%	15%	8%	9%	8%
	Scuba	4%	6%	5%	4%		6%	3%
	Visit friends/ Relatives	3%	11%	2%	4%	17%	3%	4%
	Other	3%	6%	2%	5%		4%	2%
	Organized sports	2%	6%	1%	4%		2%	3%
	Married/ Attn wedding	2%		2%	2%		2%	2%
	Company Sponsored	2%		2%		8%	2%	2%
	Company/ Business Trip	1%		1%	3%		2%	1%
	Career Cert/ Testing	1%		1%	1%		1%	1%
	Golf	1%		0%	1%		1%	1%
	Total Count	348	18	203	111	12	174	172

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	53%	38%	54%	56%	44%	57%	54%	63%	40%
	Natural beauty	42%	63%	33%	39%	27%	50%	43%	50%	33%
	Honeymoon	28%	13%	54%	45%	32%	25%	17%	7%	20%
	Short travel time	28%	50%	21%	33%	24%	20%	31%	30%	40%
	Shopping	27%	50%	33%	31%	22%	30%	20%	23%	27%
	Safe	26%	38%	17%	22%	29%	30%	23%	29%	13%
	Recomm- friend/family/trvl agnt	21%	13%	17%	19%	25%	20%	23%	23%	7%
	Water sports	10%		8%	11%	17%	14%		5%	
	Price	9%	13%		8%	10%	18%	17%	5%	7%
	Pleasure	9%	25%	8%	8%	3%	16%	14%	5%	
	Previous trip	9%	25%		5%	3%	18%	9%	16%	7%
	Scuba	4%			6%	3%	9%		4%	
	Visit friends/ Relatives	3%		4%	3%	2%	5%	6%	2%	
	Other	3%				3%	2%	6%	5%	7%
	Organized sports	2%			5%		5%	3%		7%
	Married/ Attn wedding	2%			2%	3%	2%	6%		
	Company Sponsored	2%	13%		5%		2%			
	Company/ Business Trip	1%					2%	3%	5%	
	Career Cert/ Testing	1%				2%				7%
	Golf	1%				2%		3%		
Total	Count	348	8	24	64	59	56	35	56	15

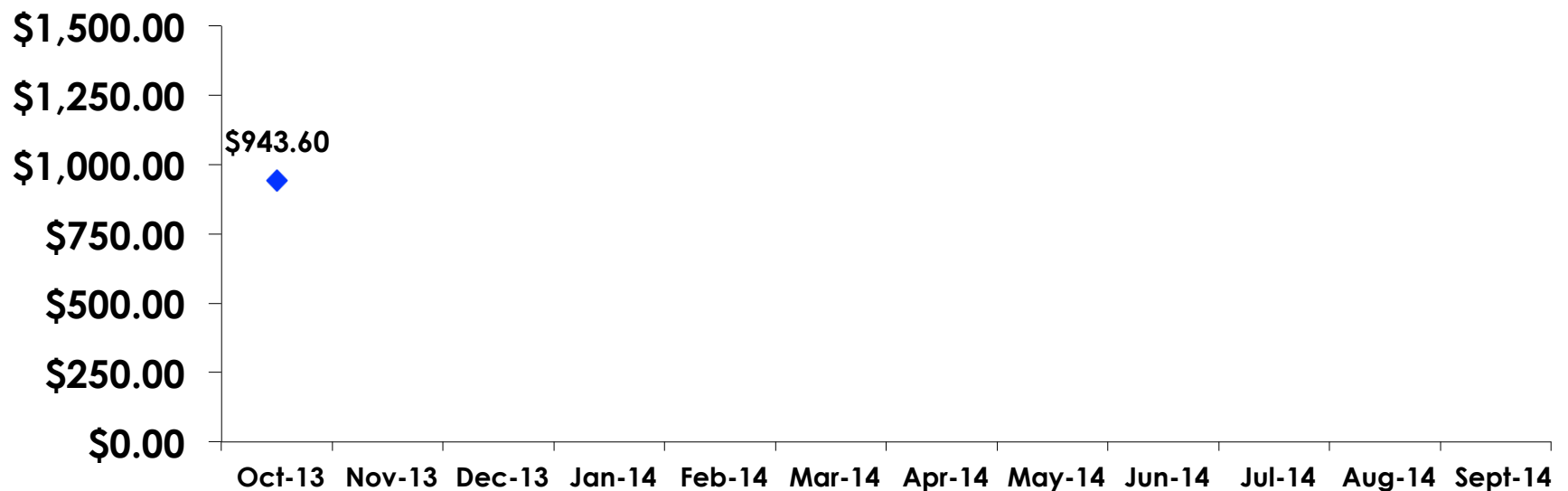
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW 1,058.39/US\$1

- \$1,962.06 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,691 = maximum (highest amount recorded for the entire sample)
- \$943.60 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



YTD=\$943.60

Breakdown of Prepaid Expenditures

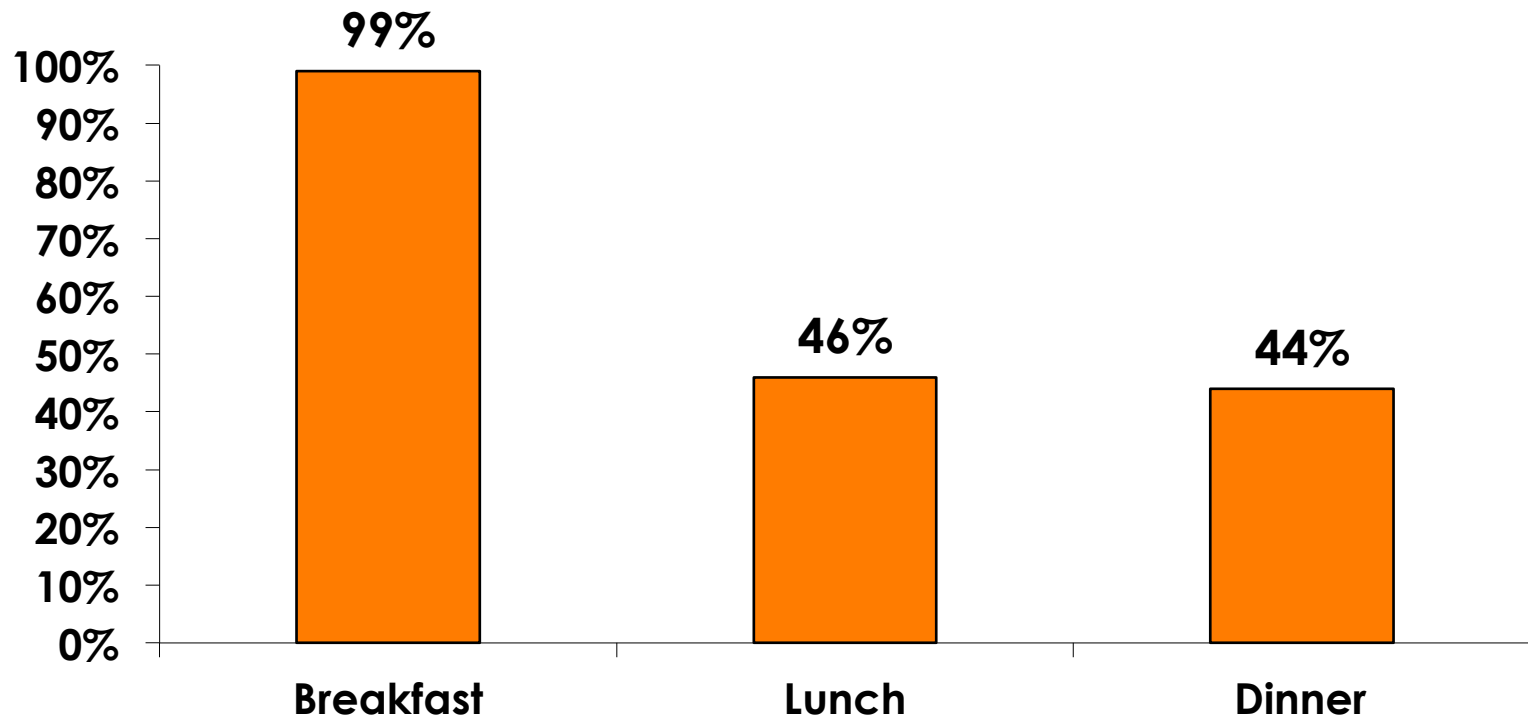
KW 1,058.39=\$1

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

	MEAN \$
Air & Accommodation package only	\$1,868.89
Air & Accommodation w/ daily meal package	\$2,663.79
Air only	\$859.92
Accommodation only	\$629.44
Accommodation w/ daily meal only	\$798.62
Food & Beverages in Hotel	\$157.47
Ground transportation – Korea	\$62.25
Ground transportation – Guam	\$132.48
Optional tours/ activities	\$292.11
Other expenses	\$444.21
Total Prepaid	\$1,962.06

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package
n=190

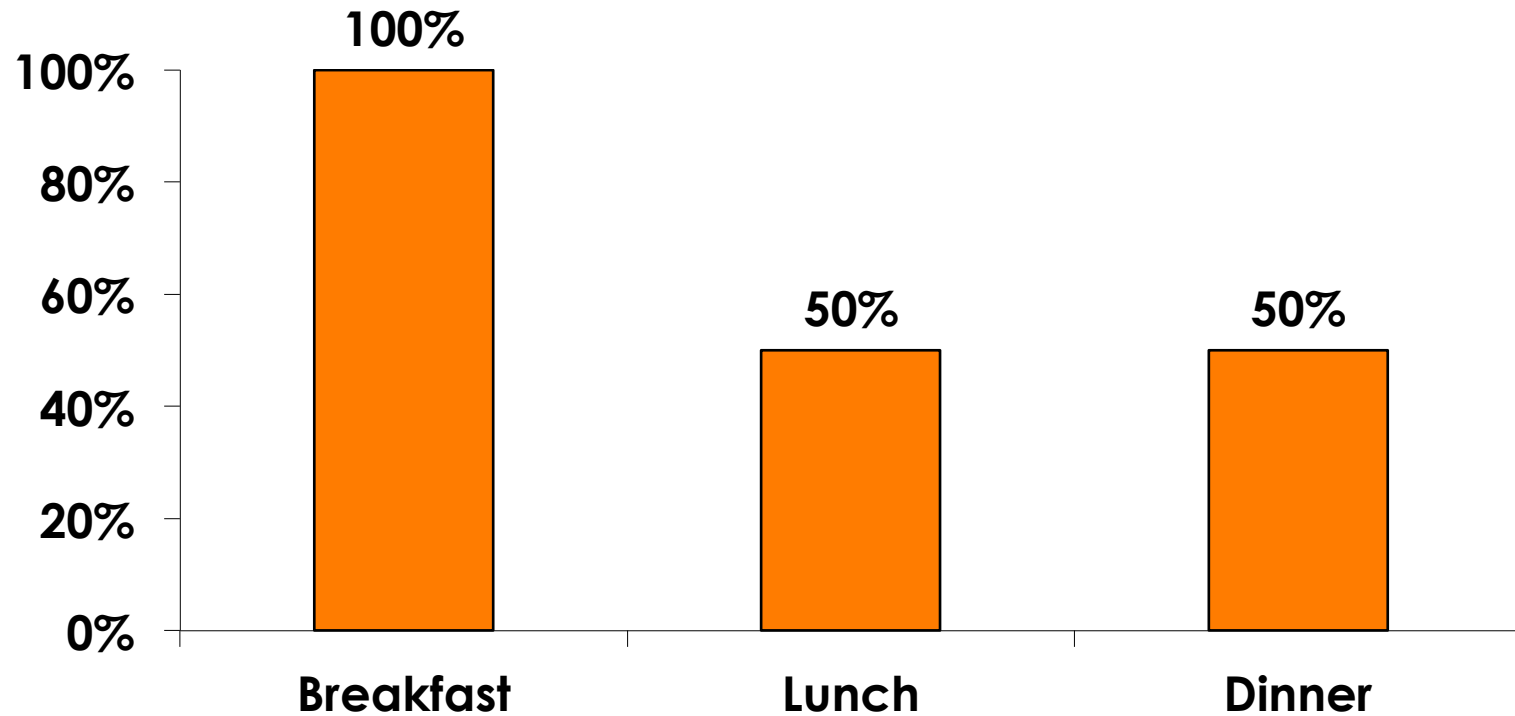


Mean=\$2,663.79 per travel party

Prepaid Meal Breakdown

Accommodations with Daily Meal Package

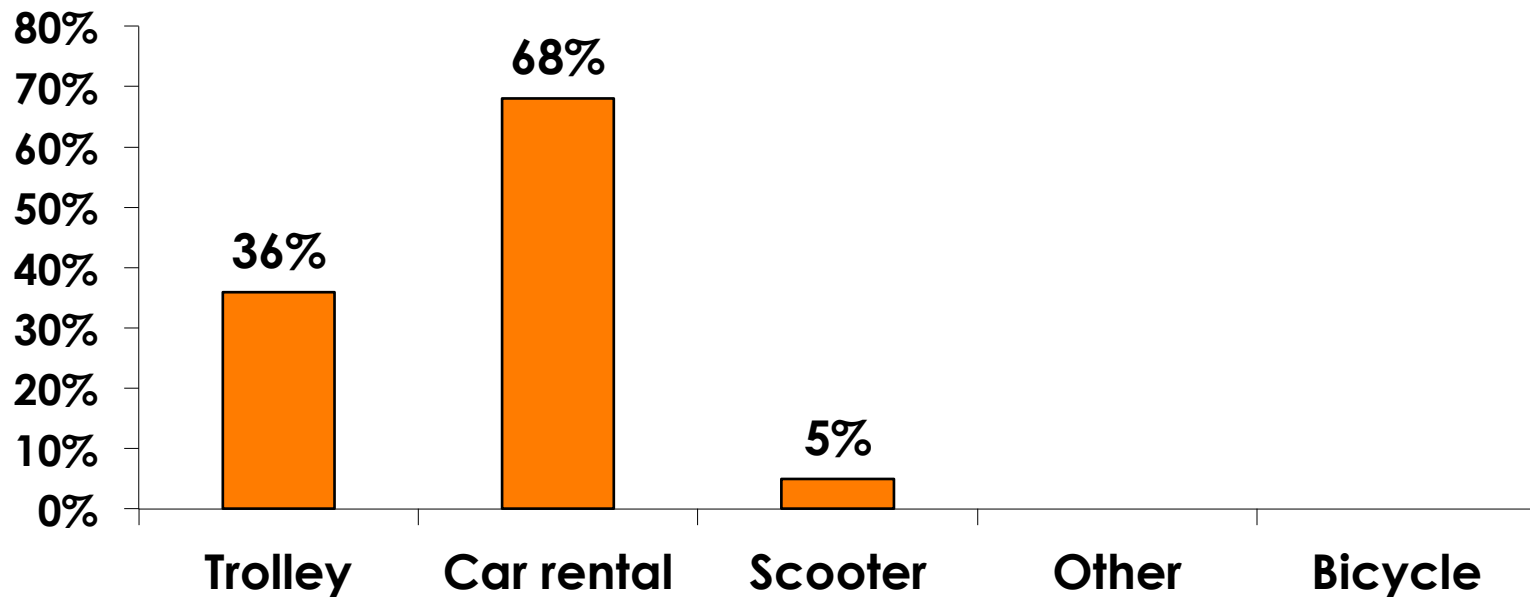
n=4



Mean=\$798.62 per travel party

Prepaid Ground Transportation

n=22



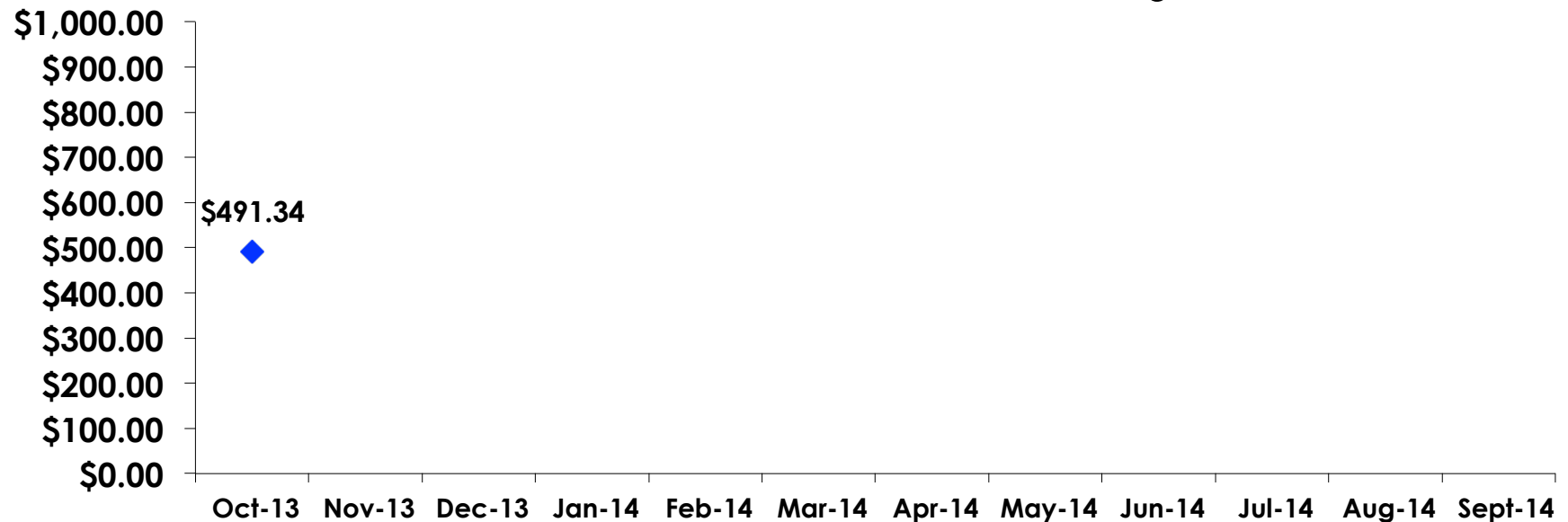
Mean=\$132.48 per travel party

On-Island Expenditures

Per Stay

- \$984.74 = 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)
- \$491.34 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person Per Stay



YTD = \$491.34

Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$943.60

On-Island YTD = \$491.34



◆ Prepaid

■ On-isle

Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$491.34	\$527.36	\$451.20	\$219.48	\$629.90	\$441.92	\$75.33	\$230.94	\$501.90	\$423.79	\$273.15
	Median	\$332	\$349	\$300	\$220	\$450	\$300	\$30	\$200	\$375	\$243	\$200
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,000	\$4,000	\$4,000	\$500	\$4,000	\$2,500	\$196	\$500	\$4,000	\$2,250	\$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	\$64.48	\$82.43	\$47.28	\$33.56	\$55.61	\$93.05	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.00	\$42.96	\$25.43	\$22.50	\$30.20	\$47.49	\$2.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$69.10	\$84.78	\$54.22	\$30.56	\$79.95	\$65.28	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$100.54	\$118.99	\$83.25	\$105.28	\$99.27	\$100.05	\$125.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$272.48	\$339.89	\$208.20	\$79.44	\$340.79	\$205.19	\$91.67
	Median	\$23	\$48	\$0	\$0	\$40	\$40	\$0
GIFT- OTHER	Mean	\$165.67	\$194.93	\$138.30	\$43.89	\$176.07	\$182.42	\$58.33
	Median	\$0	\$40	\$0	\$0	\$0	\$30	\$0
TRANS	Mean	\$45.40	\$52.76	\$38.57	\$32.56	\$48.31	\$44.80	\$35.00
	Median	\$0	\$0	\$0	\$0	\$8	\$0	\$0
OTHER	Mean	\$231.93	\$229.35	\$227.40	\$136.11	\$244.41	\$244.95	\$119.17
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$984.74	\$1,142.91	\$828.12	\$468.89	\$1,077.11	\$984.64	\$448.33
	Median	\$683	\$840	\$584	\$420	\$700	\$670	\$300

On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$64.48	\$57.13	\$123.13
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$34.00	\$32.91	\$42.72
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$69.10	\$69.66	\$64.62
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$100.54	\$106.59	\$52.31
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$272.48	\$262.21	\$354.36
	Median	\$23	\$15	\$60
GIFT- OTHER	Mean	\$165.67	\$175.60	\$86.41
	Median	\$0	\$15	\$0
TRANS	Mean	\$45.40	\$44.01	\$56.49
	Median	\$0	\$0	\$0
OTHER	Mean	\$231.93	\$227.86	\$264.38
	Median	\$0	\$0	\$0
TOTAL	Mean	\$984.74	\$977.26	\$1,044.41
	Median	\$683	\$696	\$660

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,434.94 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,779 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



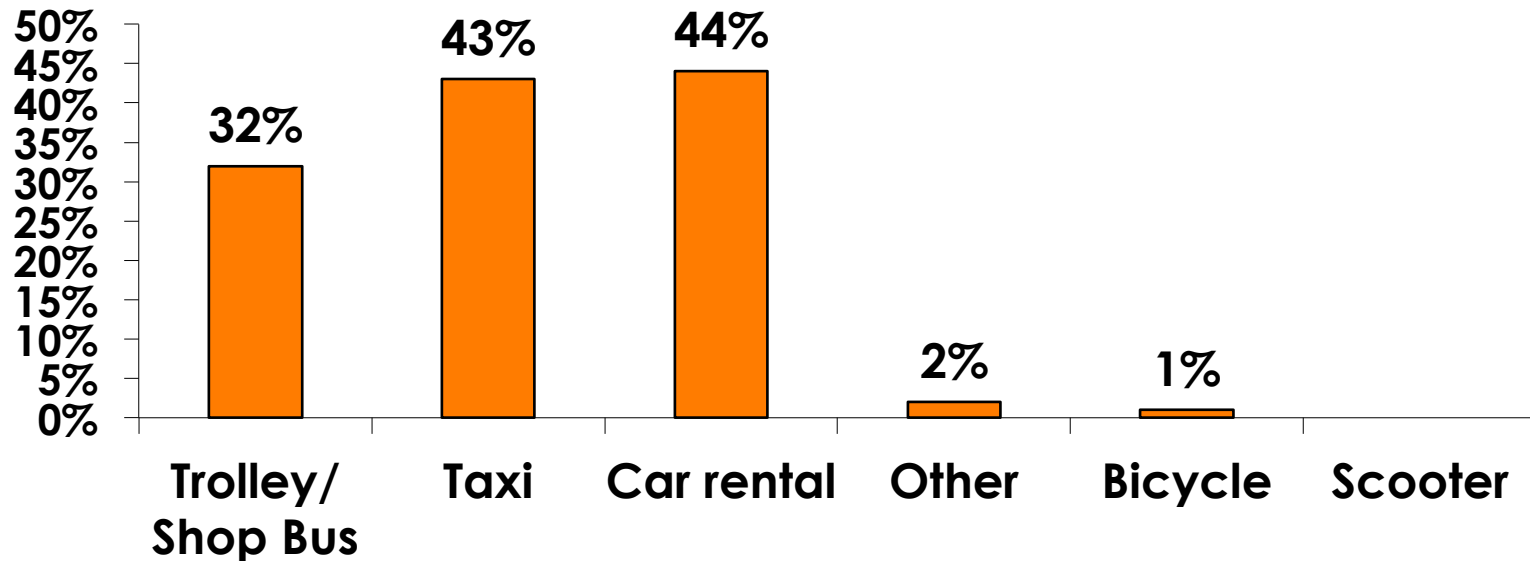
YTD=\$1,434.94

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$64.48
Food & beverage in fast food restaurant/ convenience store	\$34.00
Food & beverage at restaurants or drinking establishments outside a hotel	\$69.10
Optional tours and activities	\$100.54
Gifts/ souvenirs for yourself/companions	\$272.48
Gifts/ souvenirs for friends/family at home	\$165.67
Local transportation	\$45.40
Other expenses not covered	\$231.93
Average Total	\$984.74

Local Transportation

n=148



Mean=\$45.40 per travel party

Guam Airport Expenditures

- \$42.02 = 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

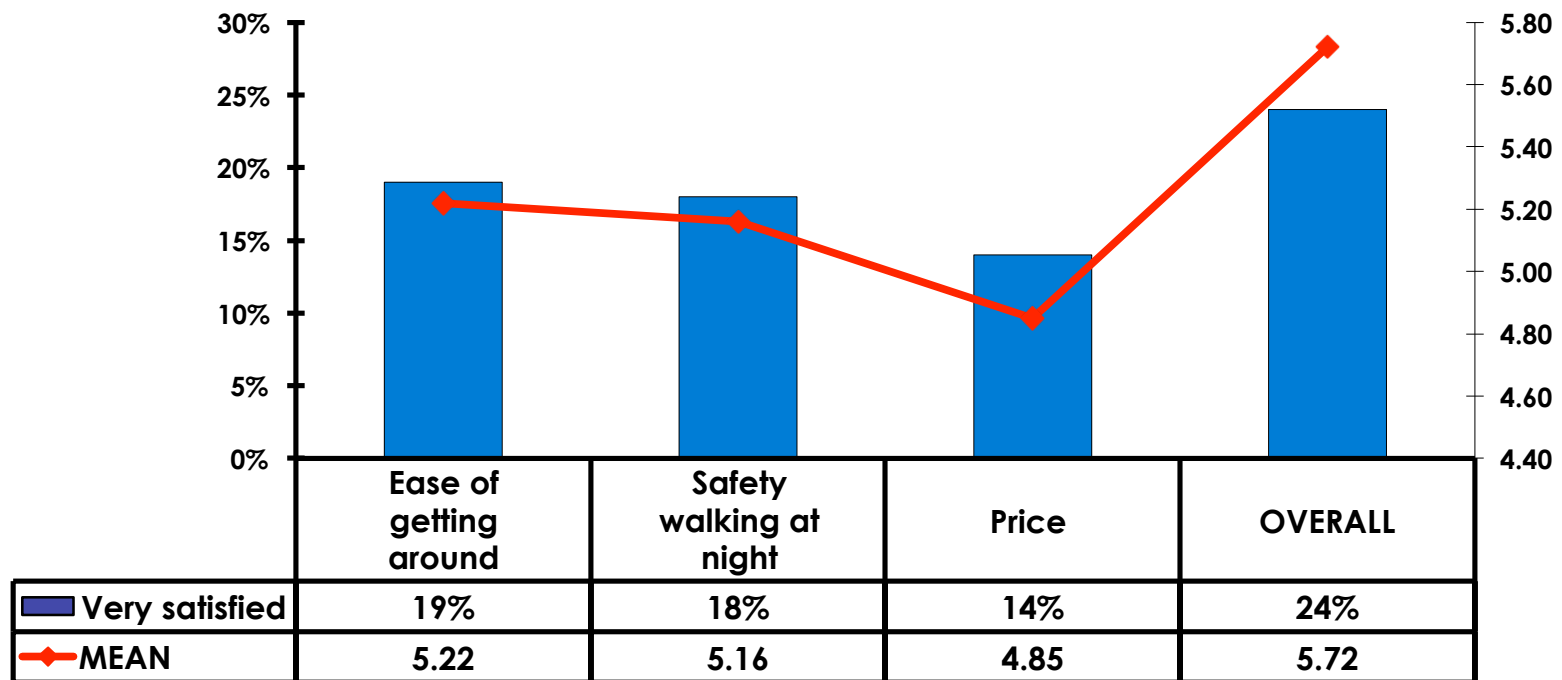
	MEAN \$
Food & Beverages	\$7.60
Gifts/Souvenirs Self	\$20.69
Gifts/Souvenirs Others	\$13.72
Total	\$42.02

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

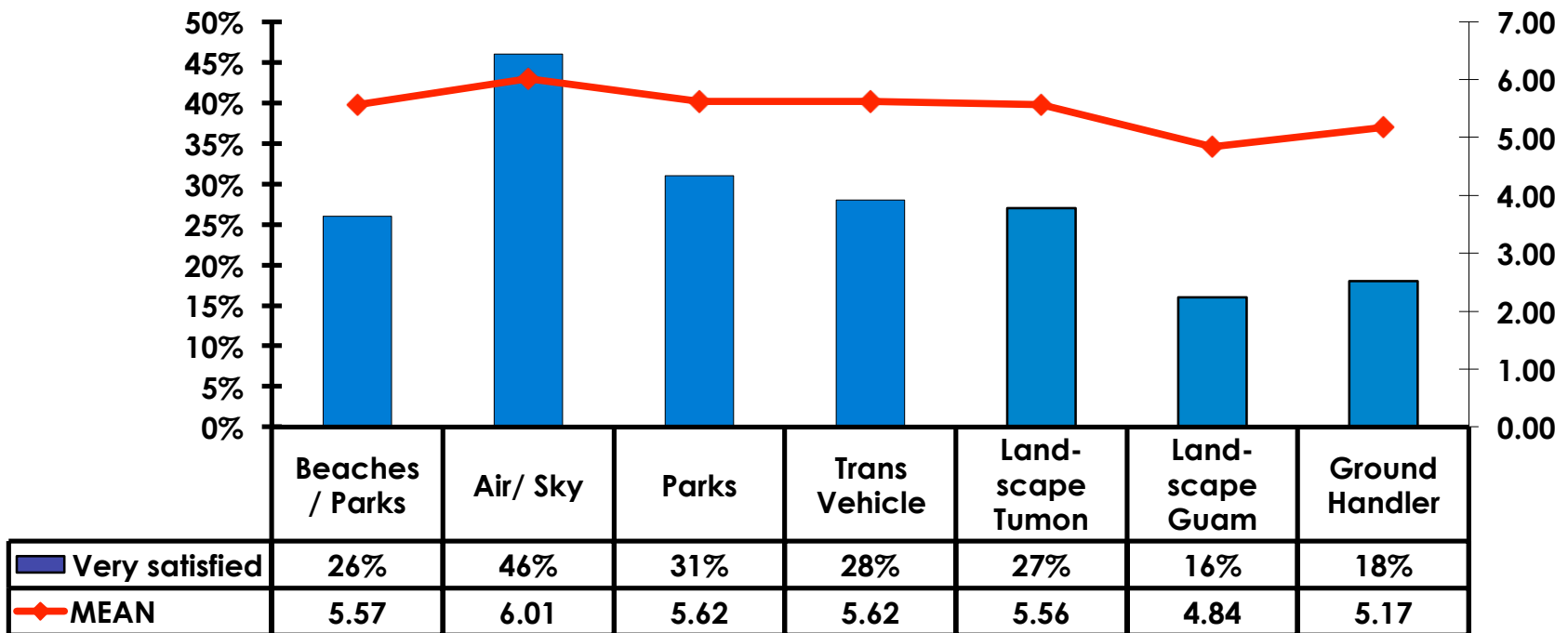
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

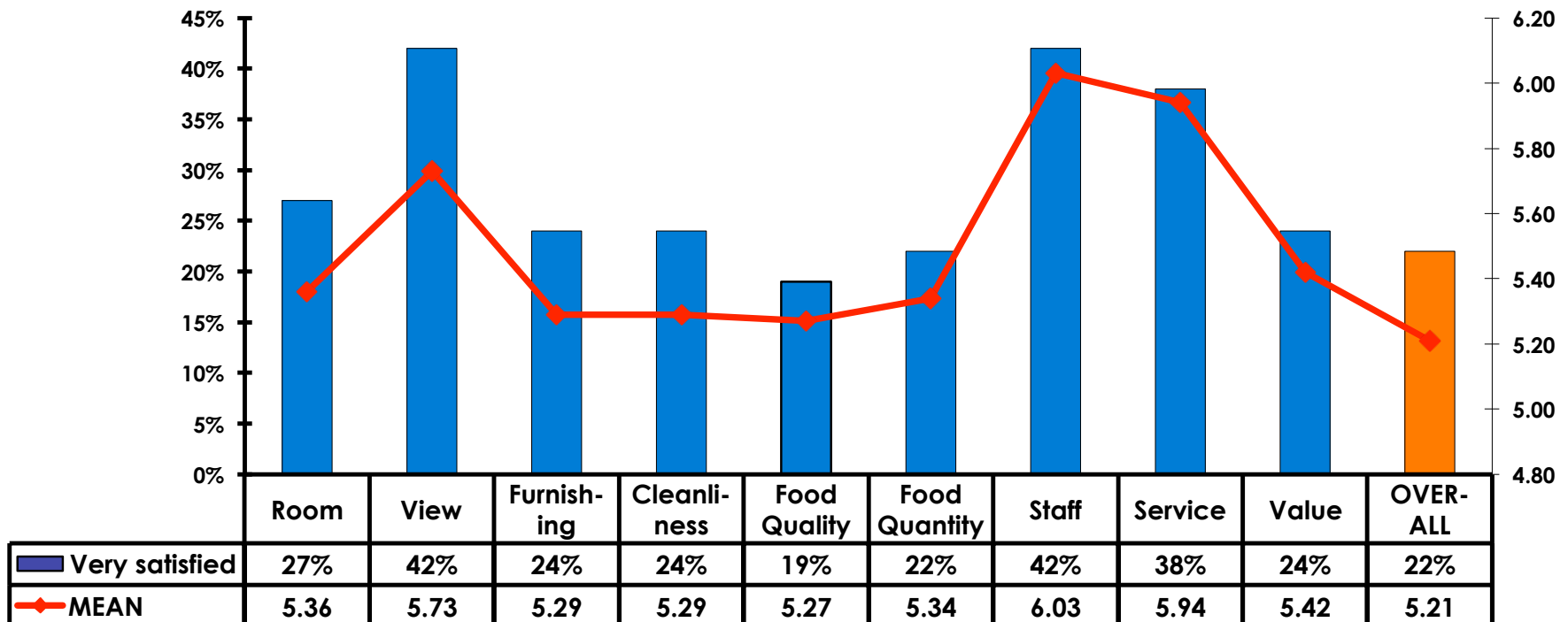
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

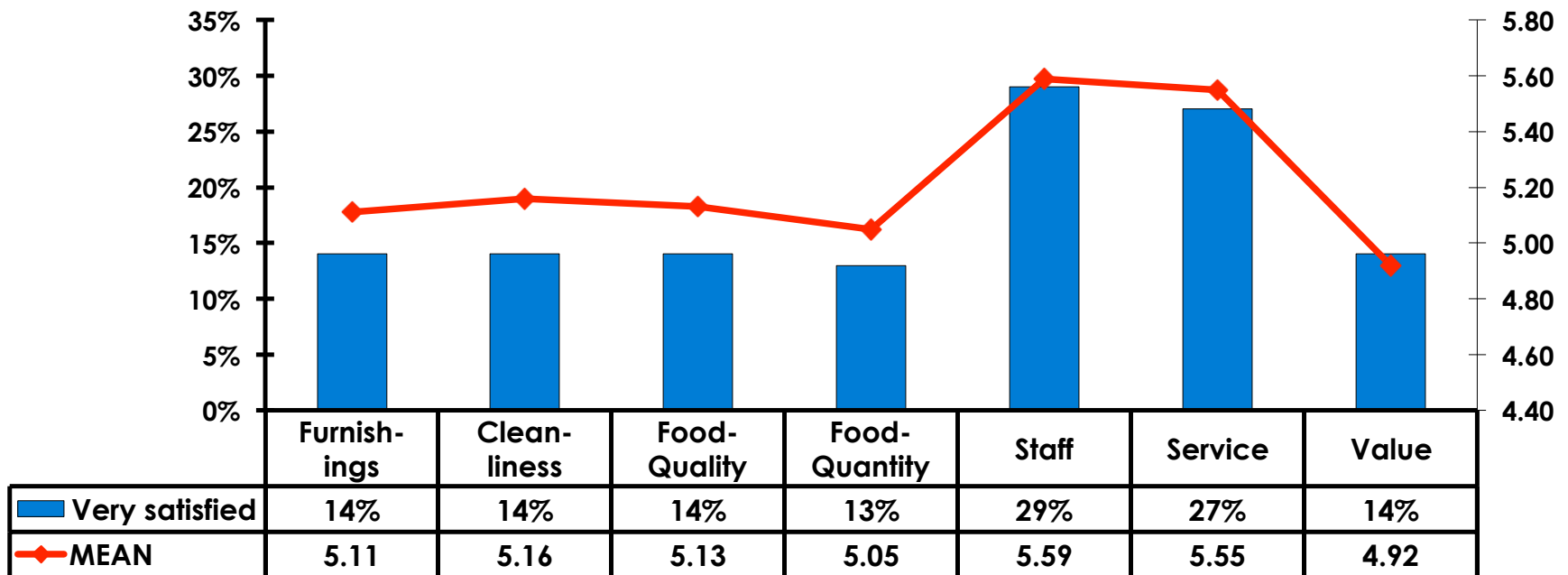
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

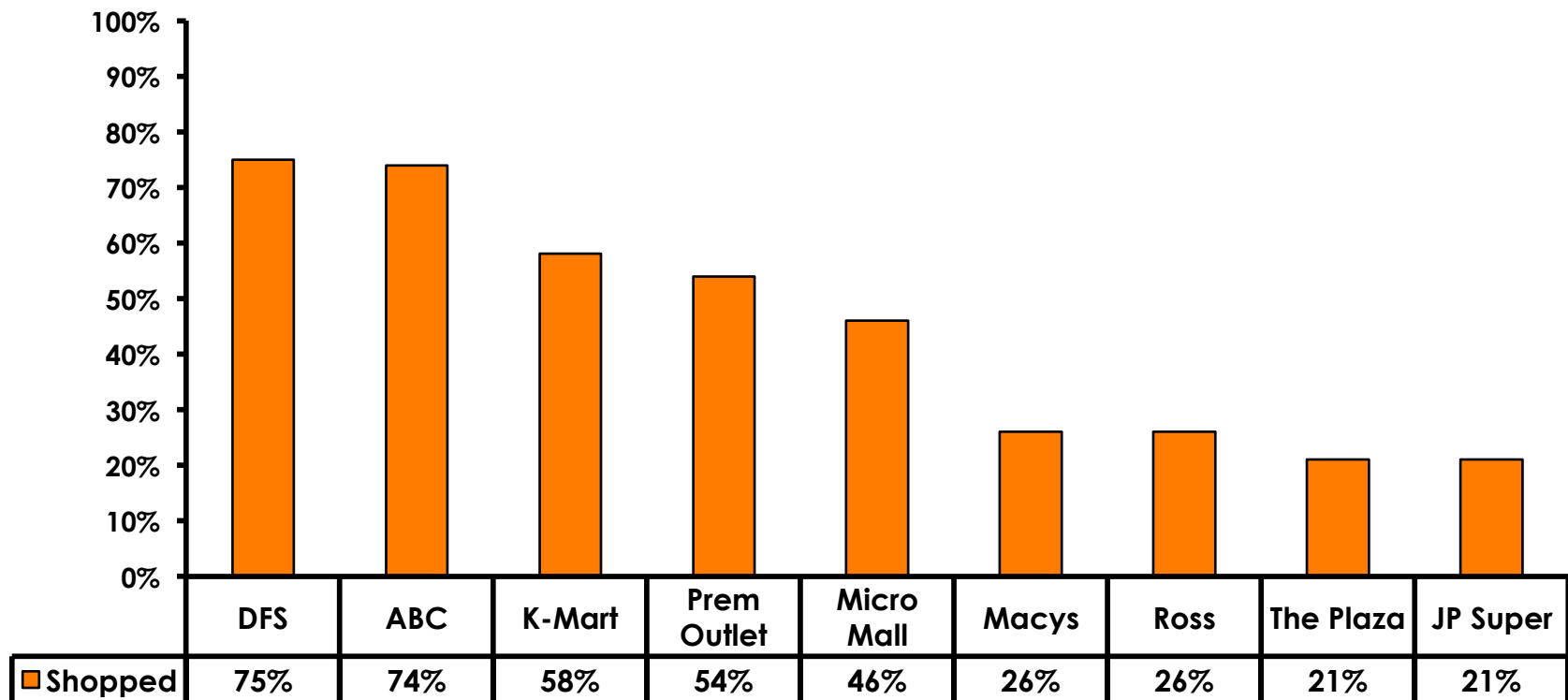
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

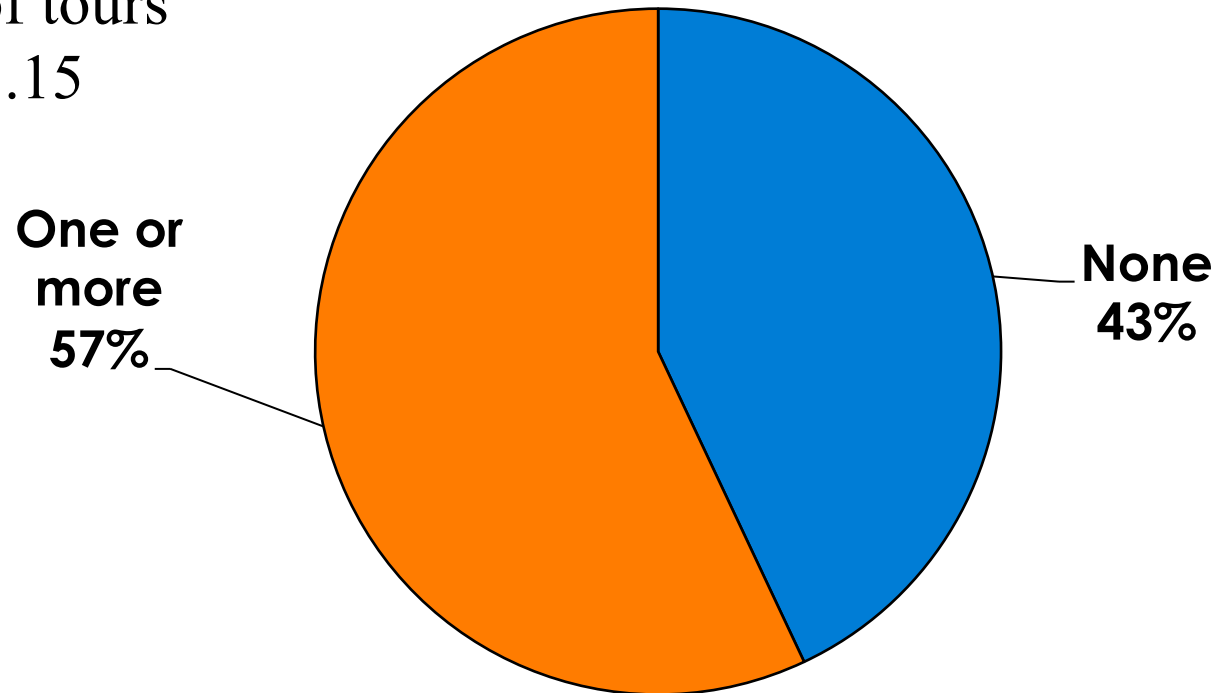
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 50%
Score of 4 to 5 = 40%	Score of 4 to 5 = 39%
Score 1 to 3 = 6%	Score 1 to 3 = 10%
MEAN = 5.40	MEAN = 5.24

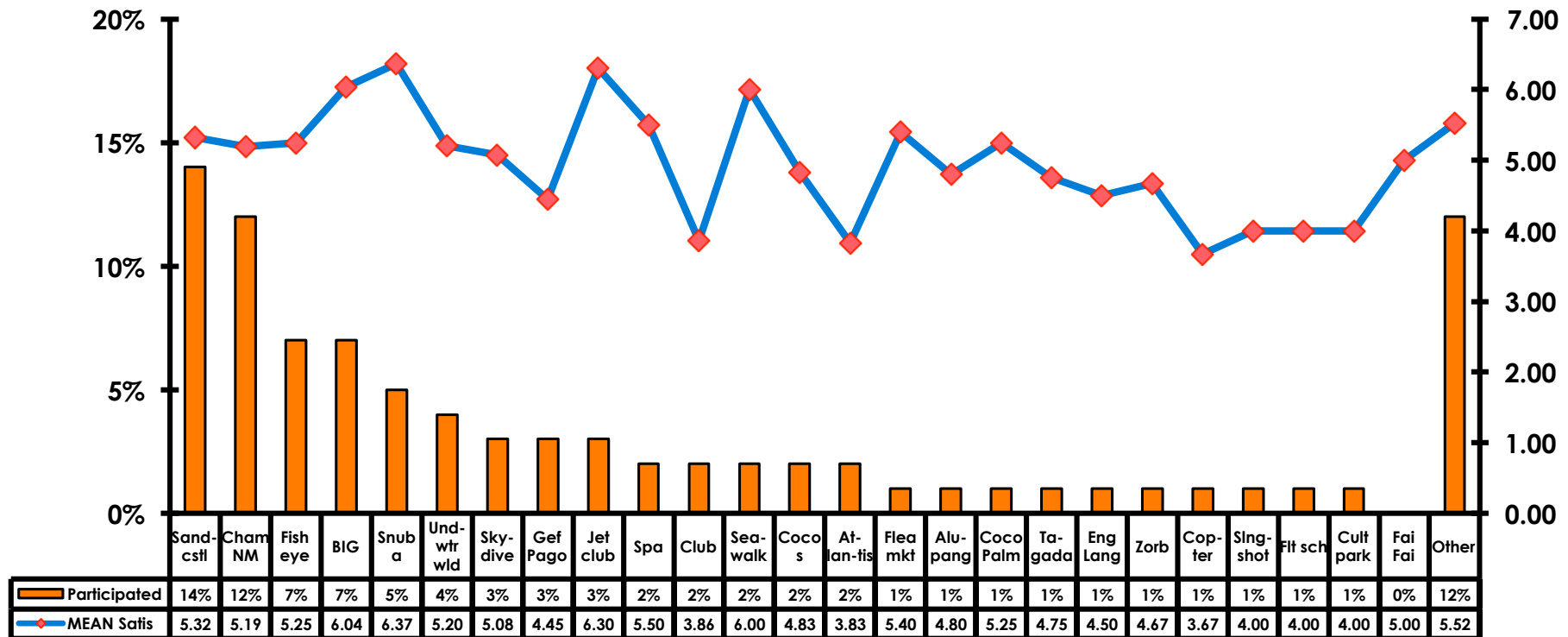
Optional Tour Participation

- Average number of tours participated in is 1.15



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 = 46%	Score of 6 to 7 = 38%
Score of 4 to 5 = 47%	Score of 4 to 5 = 50%
Score 1 to 3 = 7%	Score 1 to 3 = 12%
MEAN = 5.19	MEAN = 4.94

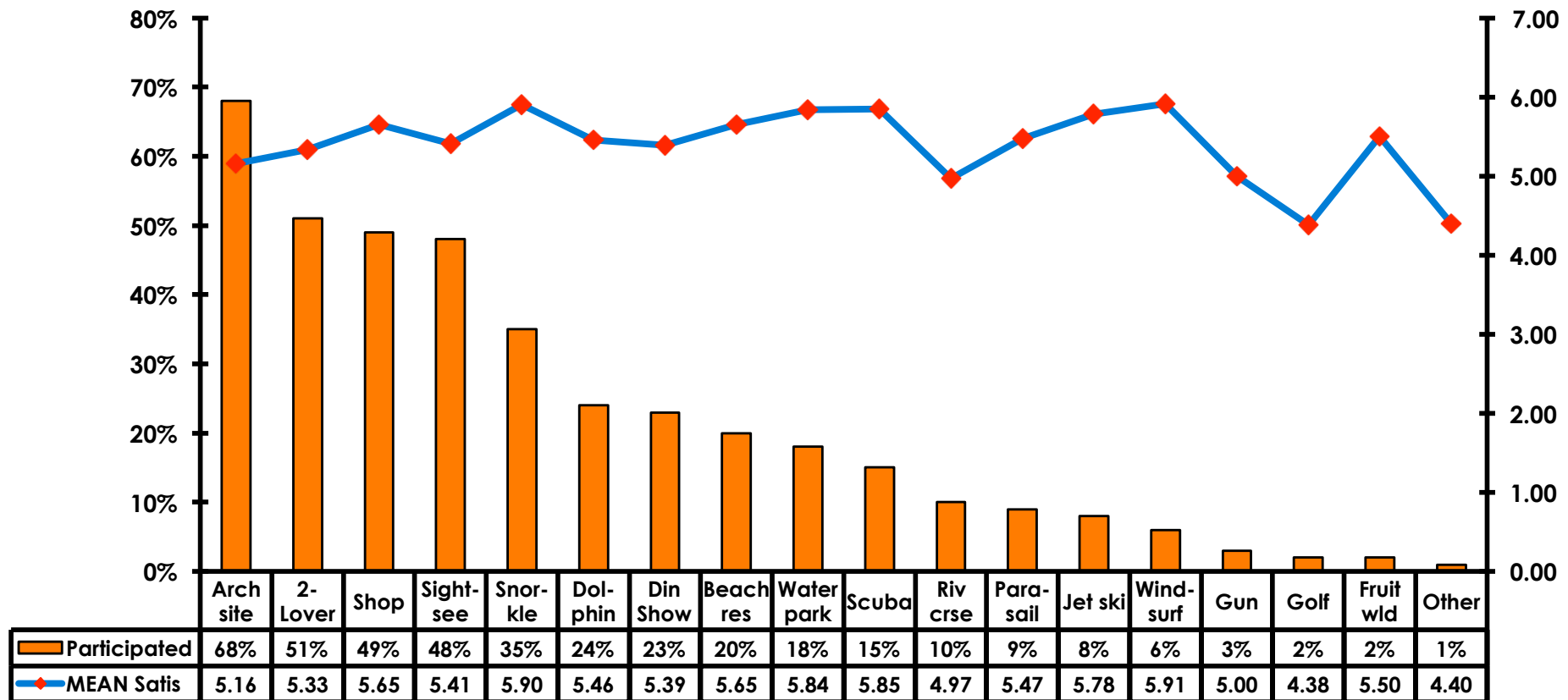
Night Tours Satisfaction

7pt Rating Scale

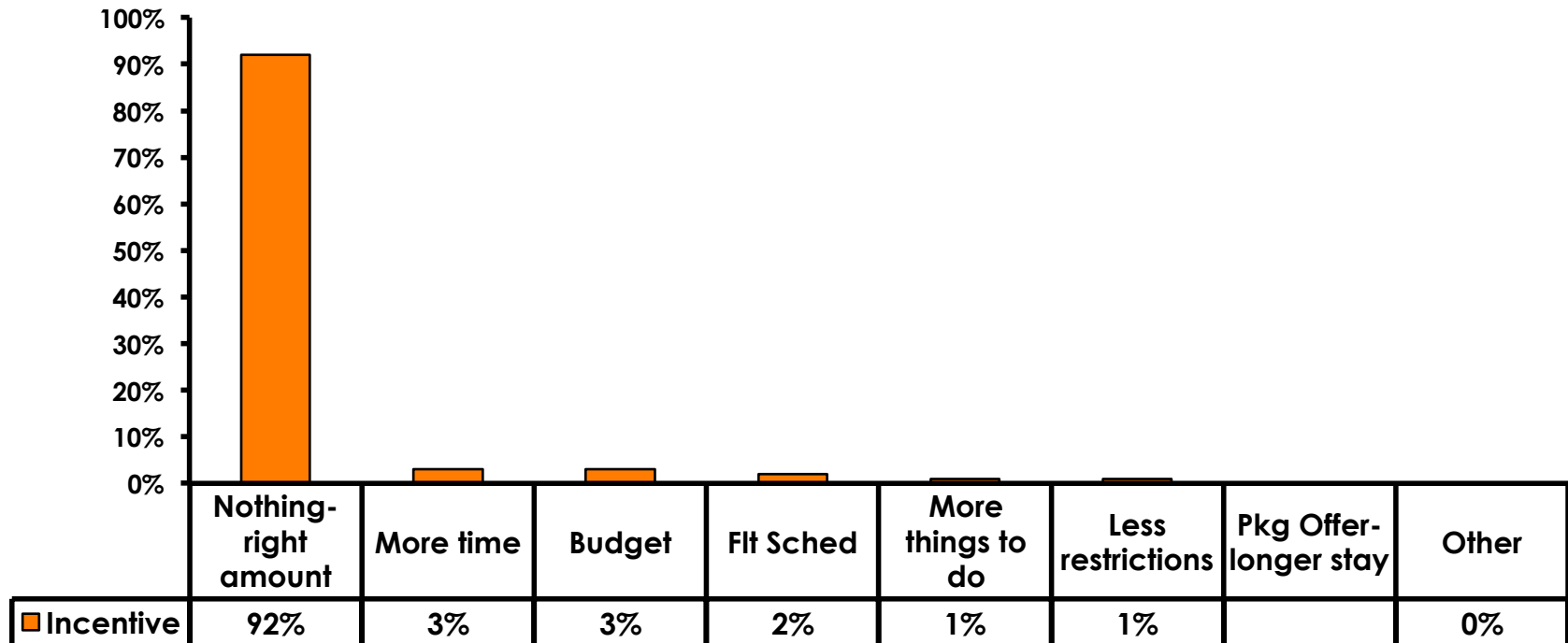
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 31%	Score of 6 to 7 = 31%
Score of 4 to 5 = 54%	Score of 4 to 5 = 53%
Score 1 to 3 = 15%	Score 1 to 3 = 16%
MEAN = 4.68	MEAN = 4.68

Satisfaction with Other Activities



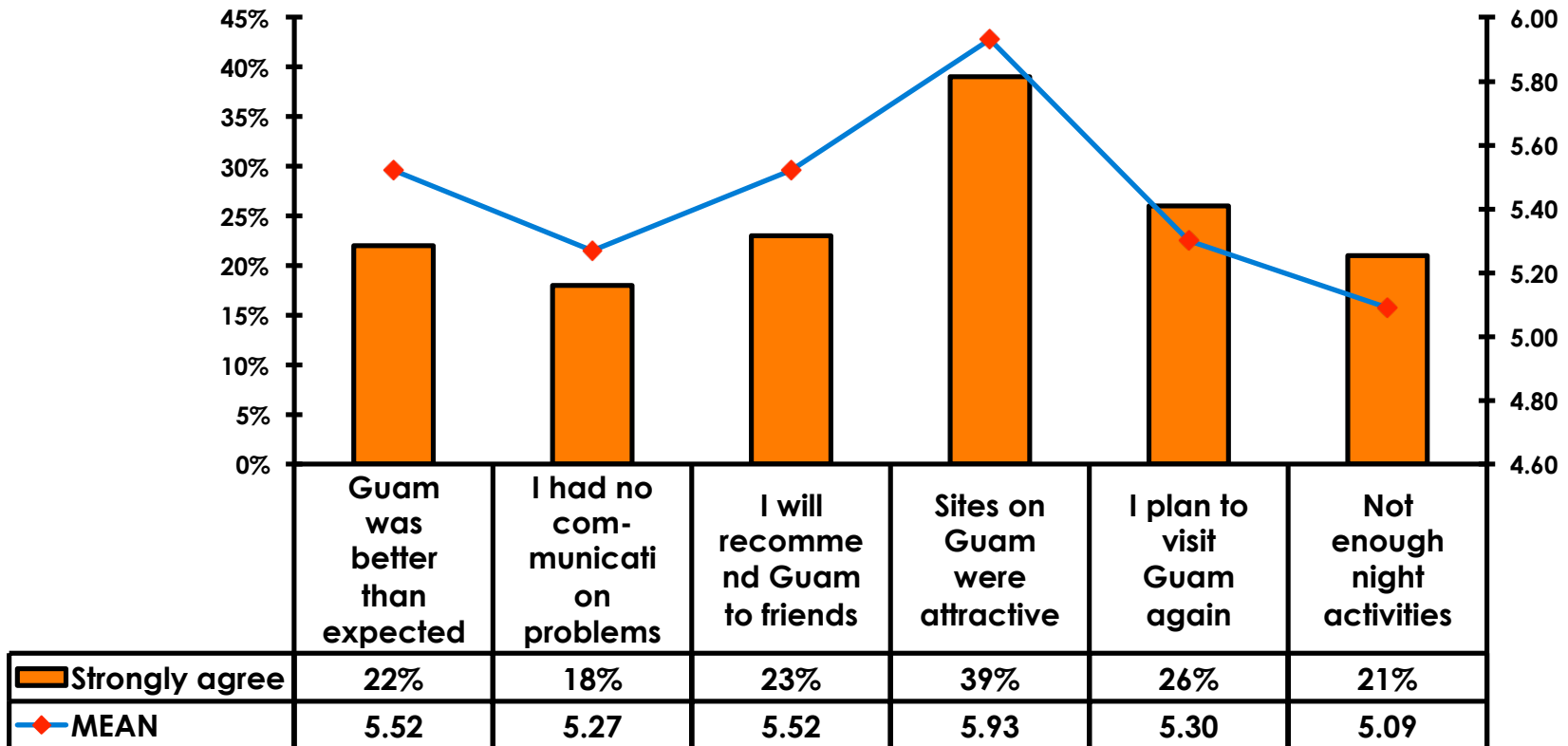
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

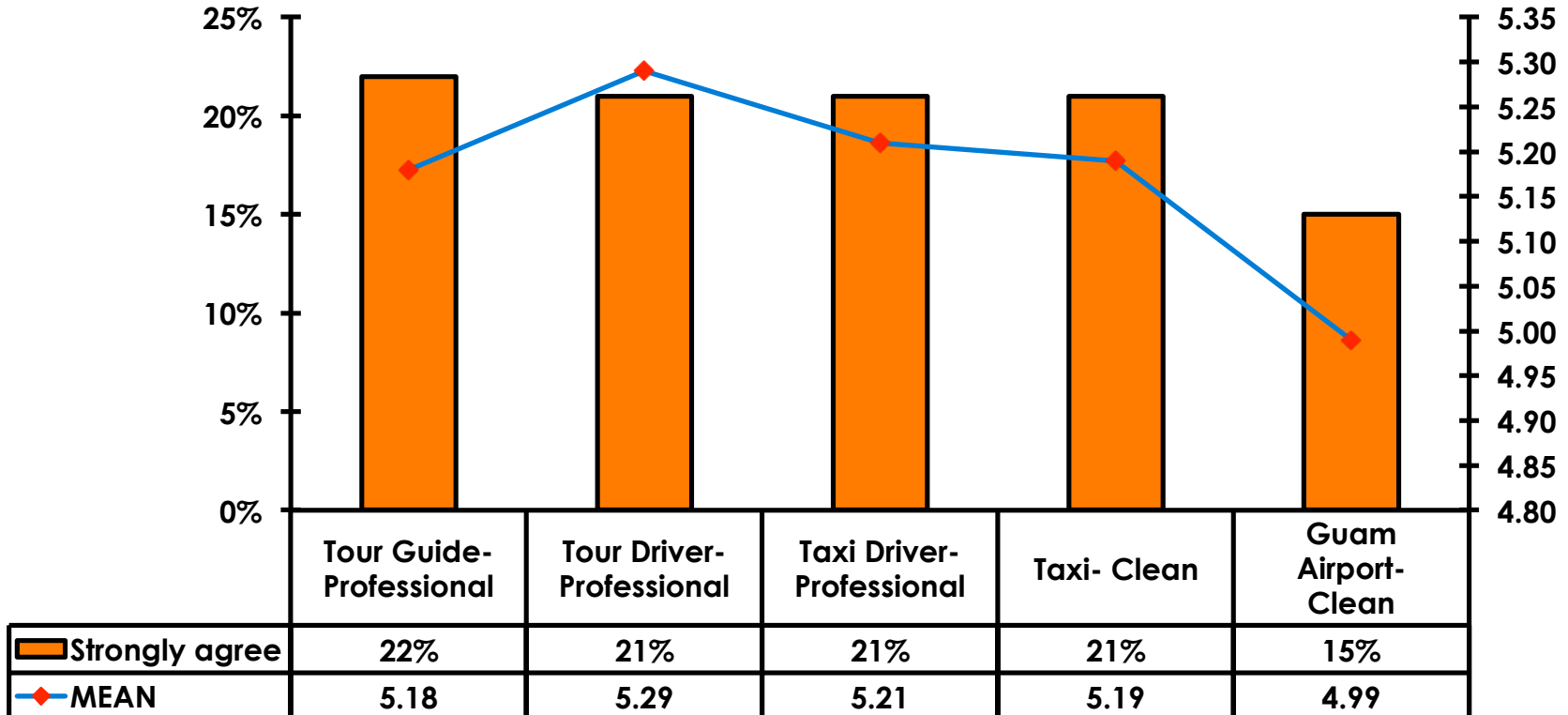
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

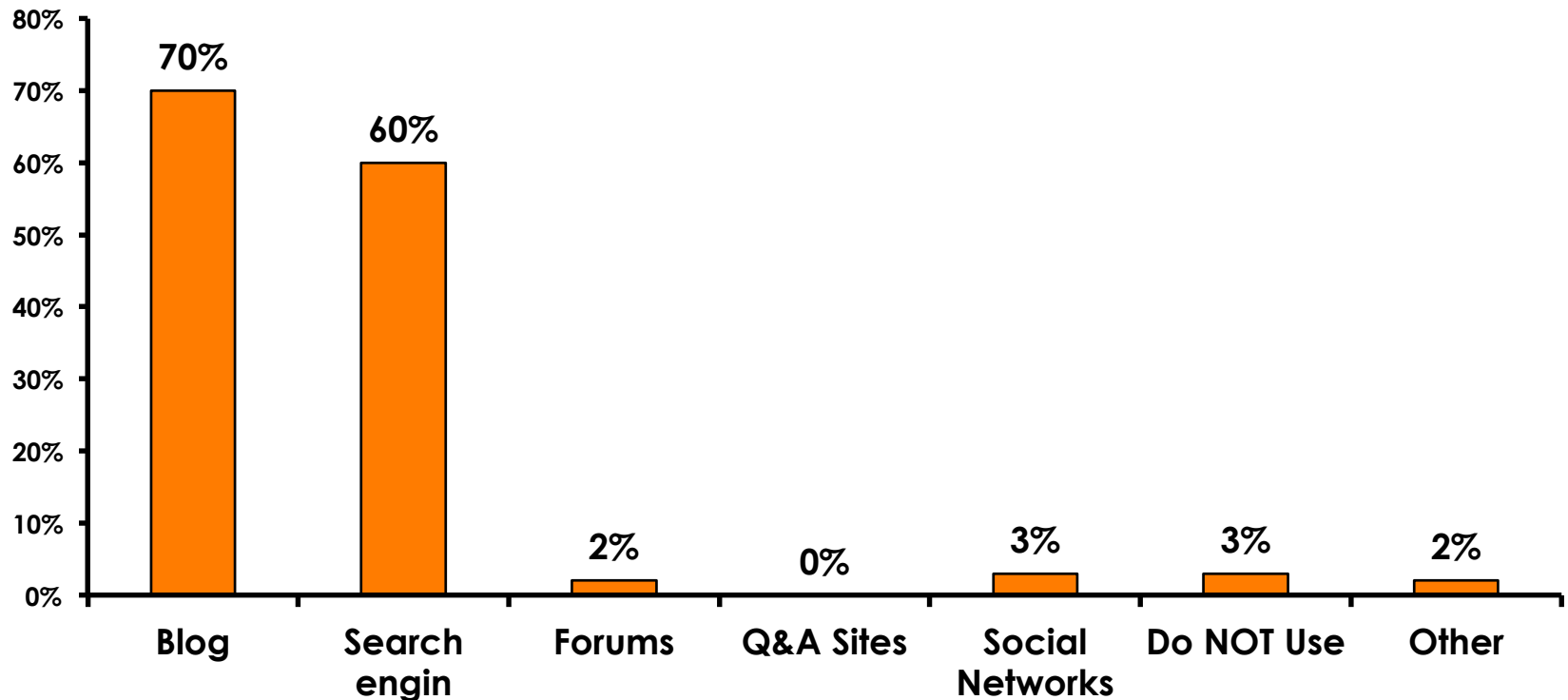
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



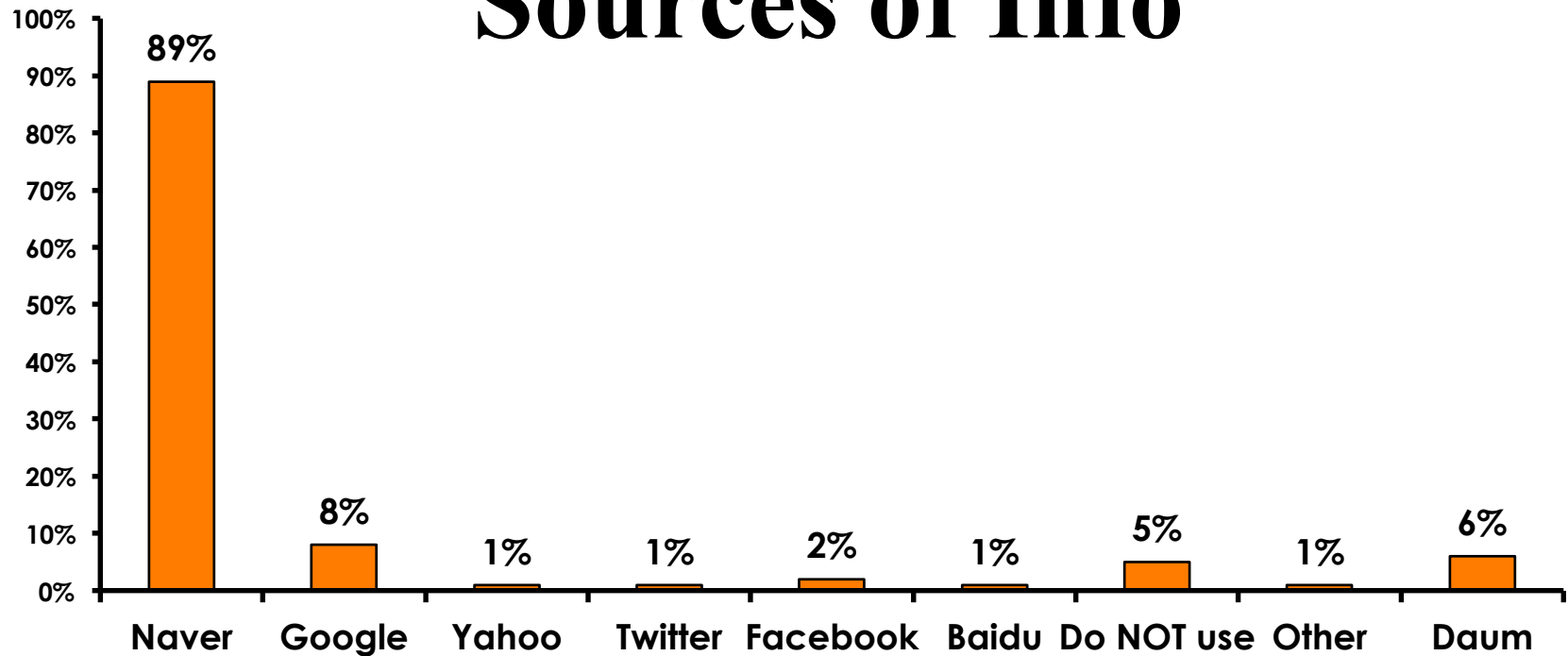
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

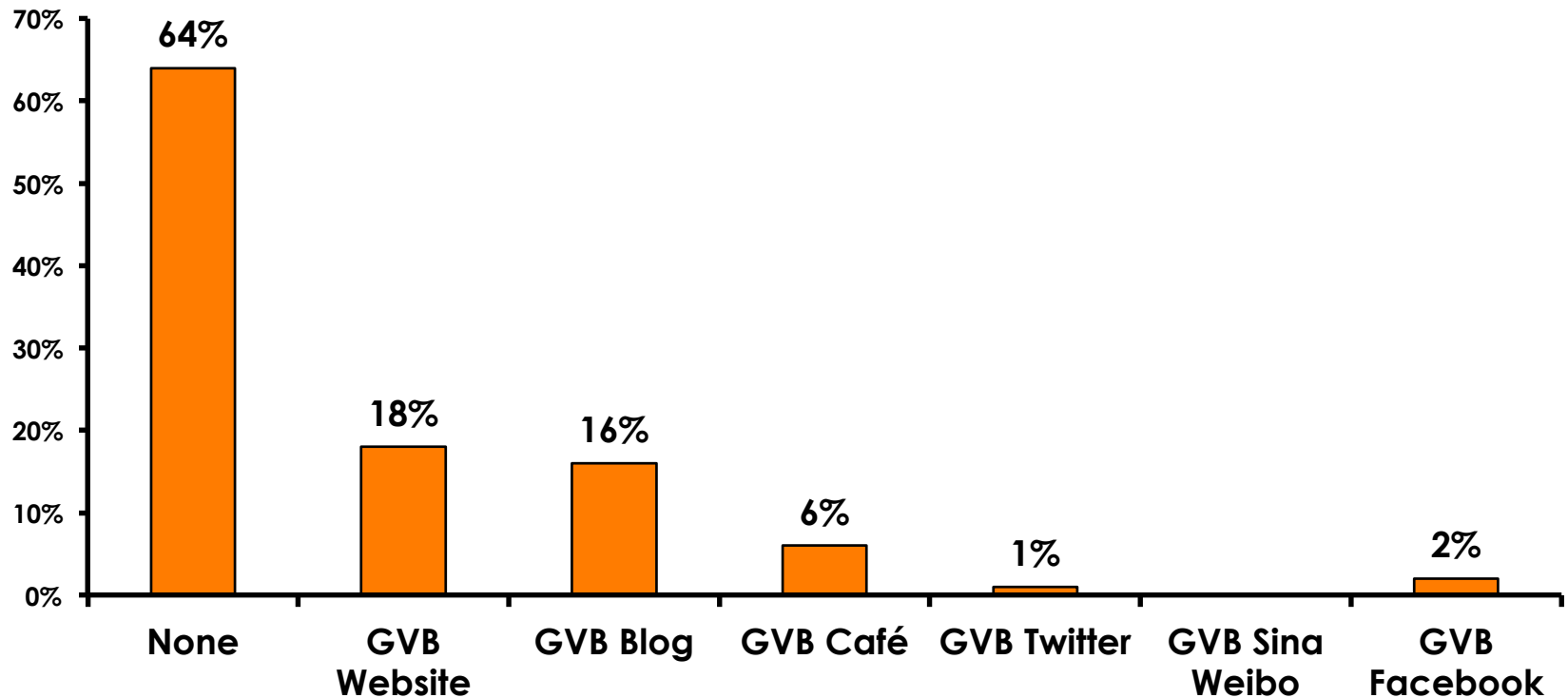


Internet- Things To Do

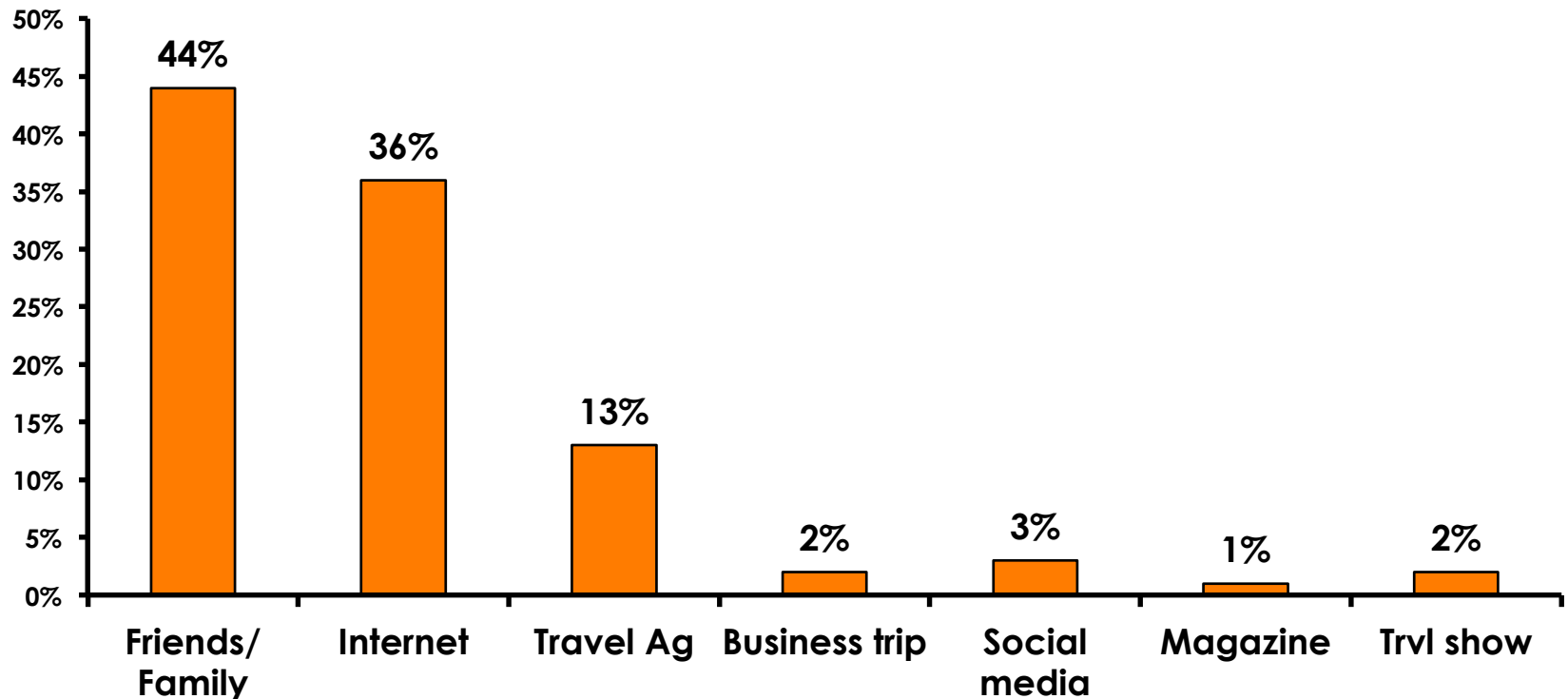
Sources of Info



Internet- GVB Sources

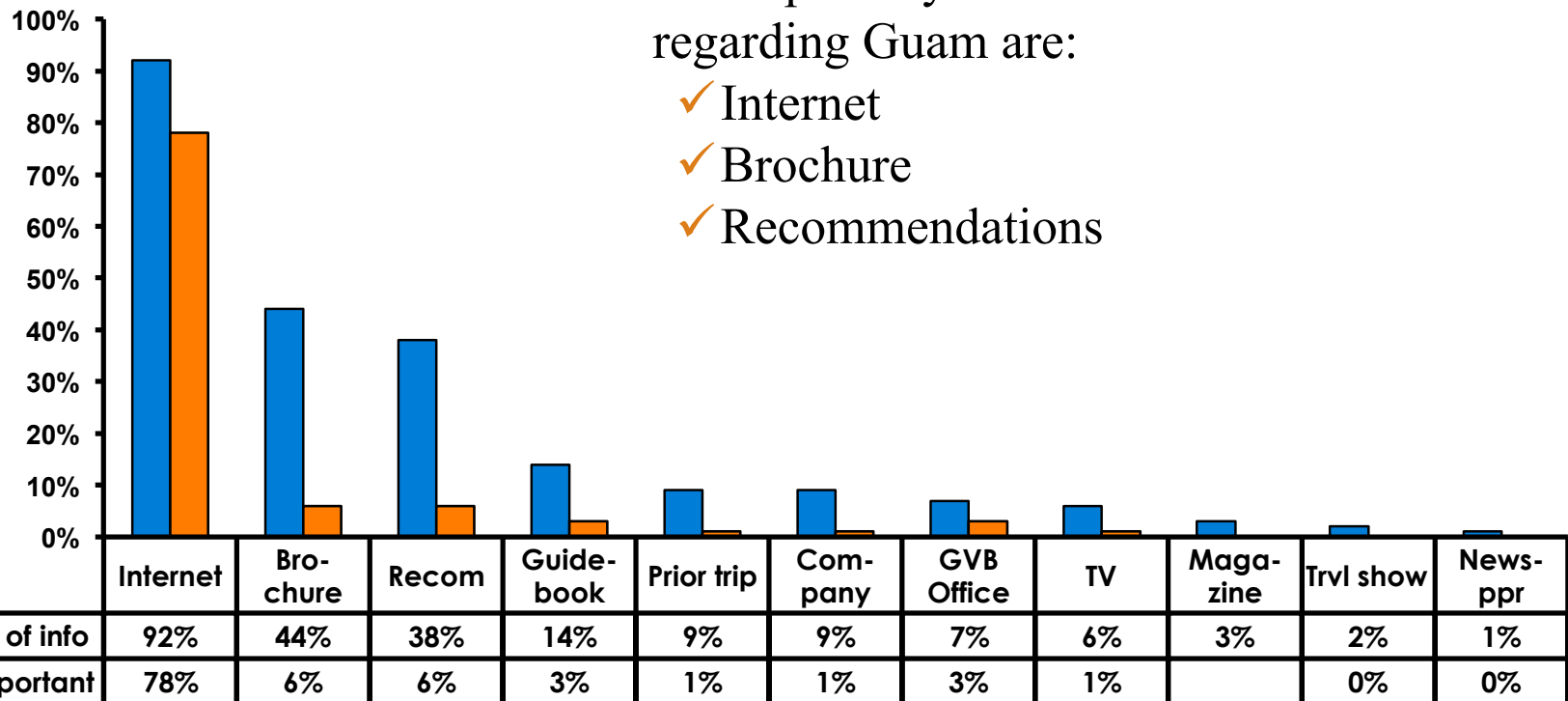


Travel Motivation- Info Sources



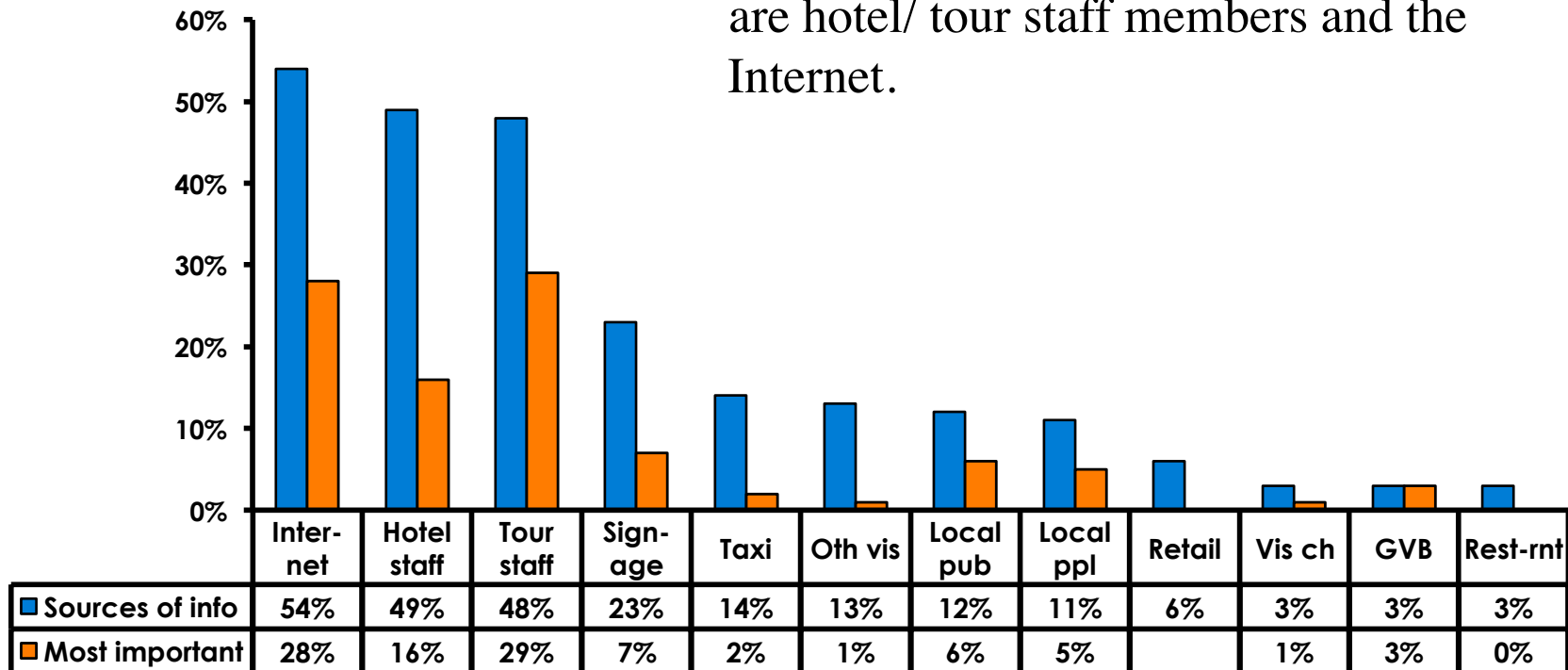
Sources of Information Pre-arrival

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



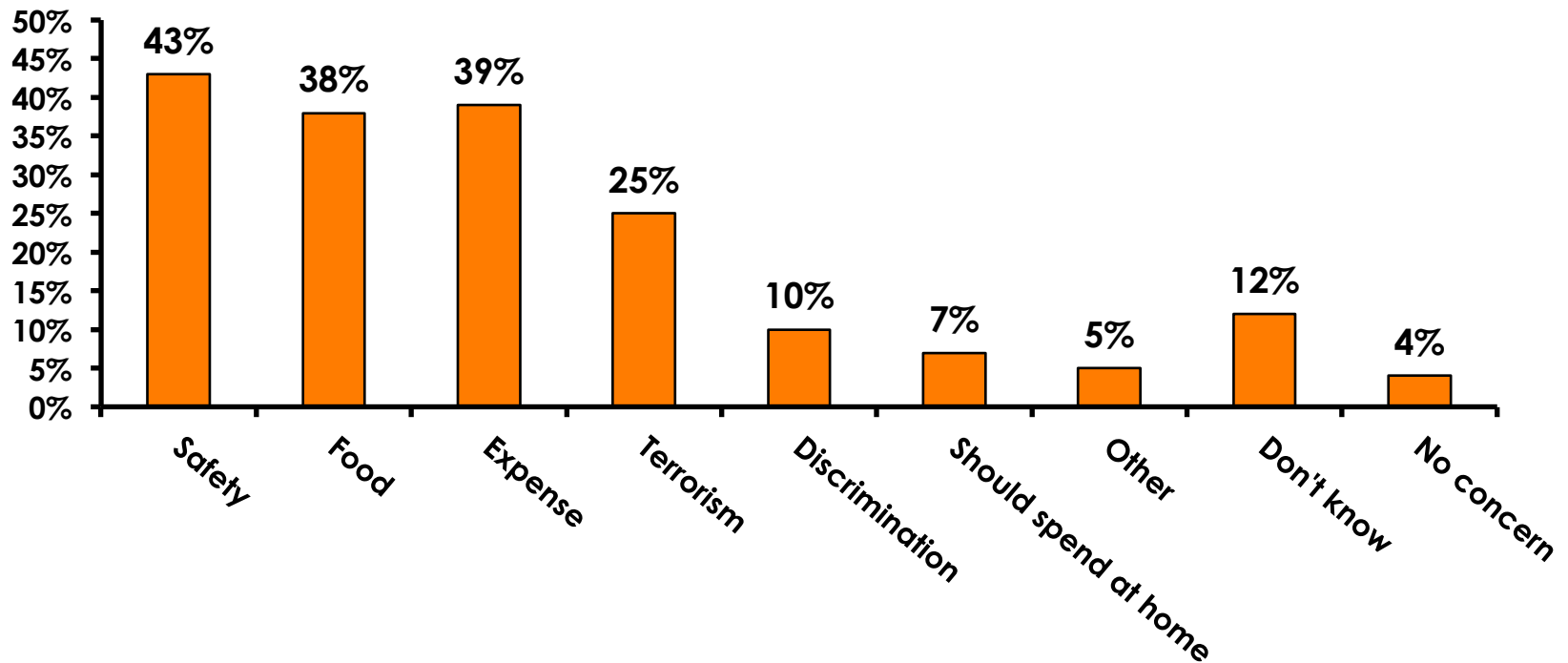
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

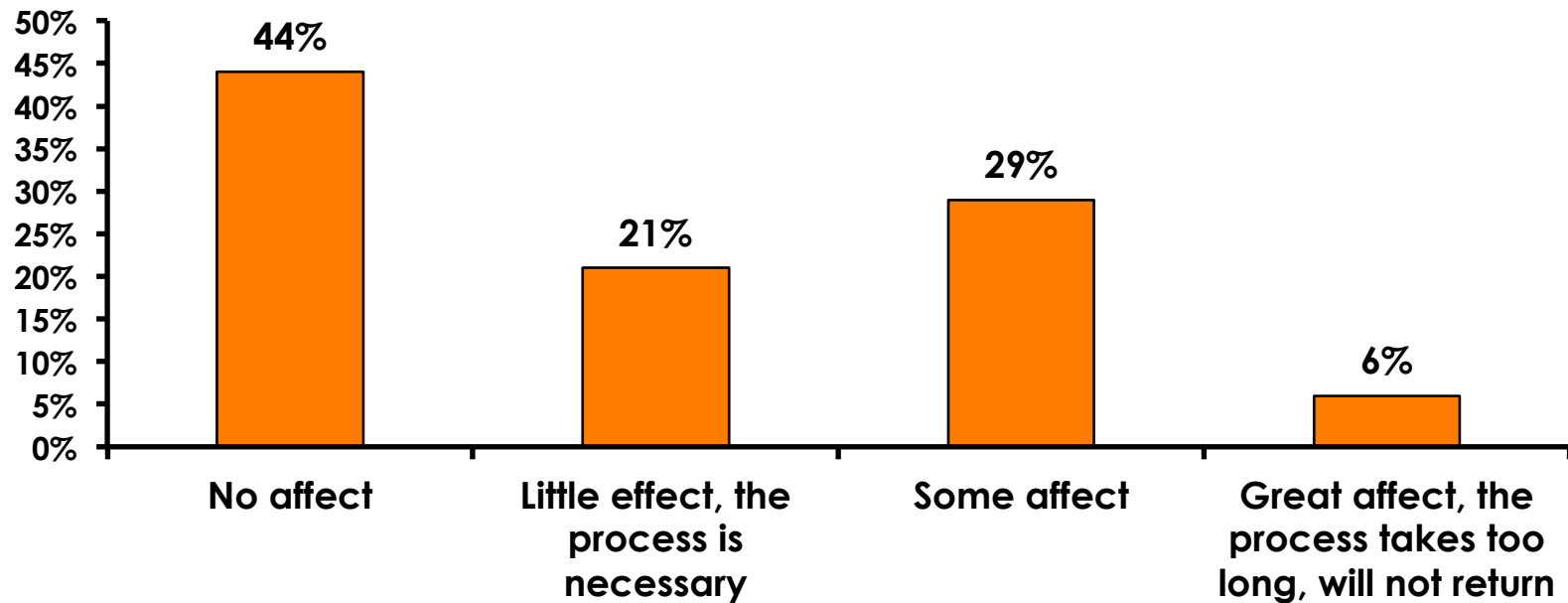
Concerns about travel outside of Korea - Overall



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	43%	22%	43%	47%	42%	50%	50%	47%	39%	54%	37%	57%	13%
	Expense	39%	39%	38%	45%	33%	63%	46%	34%	44%	38%	46%	32%	33%
	Food	38%	33%	37%	41%	33%	50%	42%	34%	42%	34%	49%	39%	33%
	Terrorism	25%	22%	24%	27%	25%	38%	13%	23%	31%	29%	17%	32%	20%
	Don't know	12%	11%	10%	11%	33%		13%	14%	10%	7%	9%	9%	7%
	Discrimination against Koreans	10%	6%	10%	11%	8%	38%	8%	8%	12%	13%	11%	9%	13%
	Should spend at home	7%	11%	11%	2%			13%	8%	8%	9%	9%	5%	7%
	Other	5%	11%	6%	4%			4%	6%	7%	2%	9%	7%	7%
	No concerns	4%	22%	3%	3%				2%	2%	5%	3%	5%	13%
	Total	Count	350	18	205	111	12	8	24	64	59	56	35	56

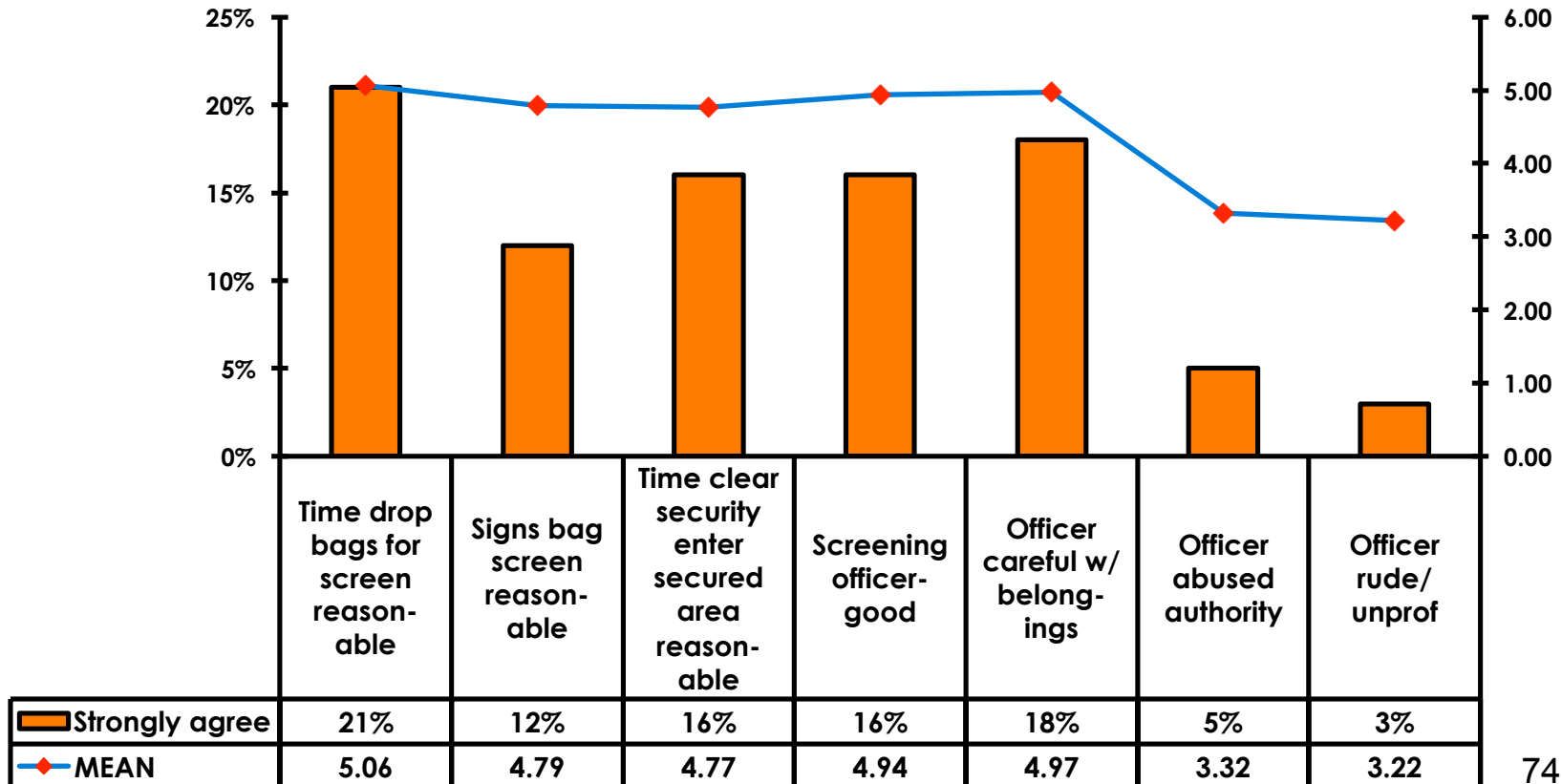
Security Screening/ Immigration Process at Guam International Airport



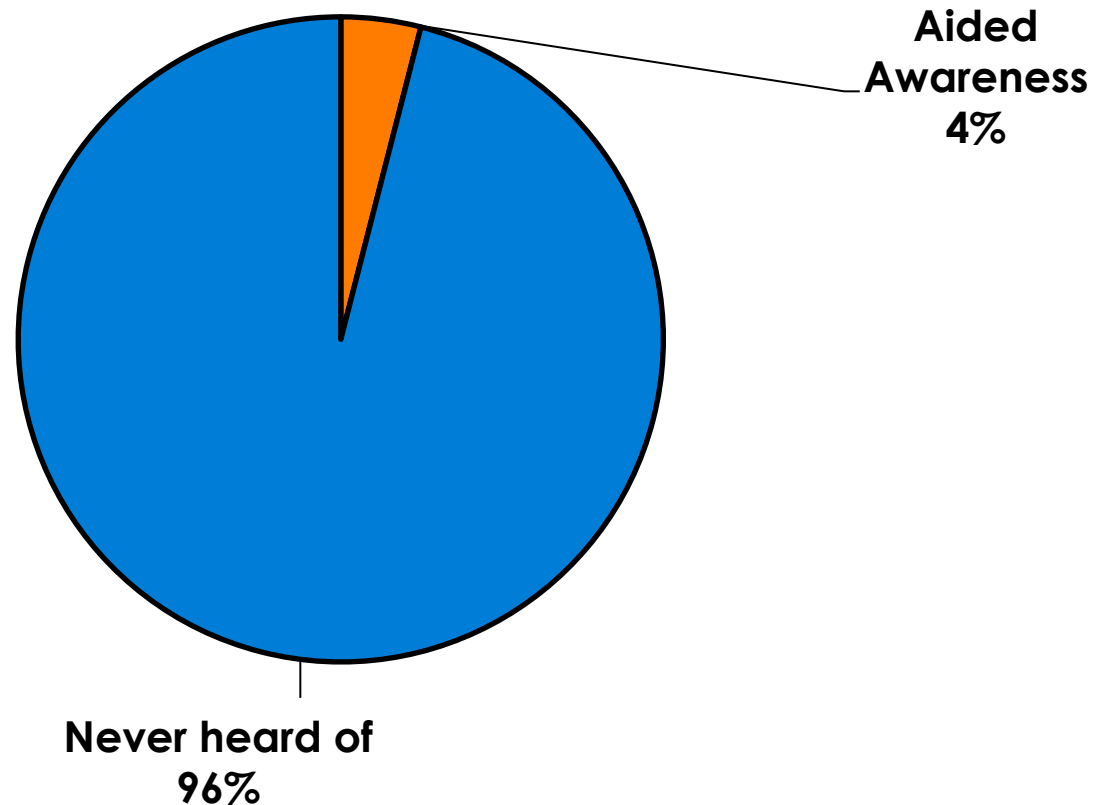
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=14

