



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2014

FEBUARY 2014



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Korean visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Korean visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

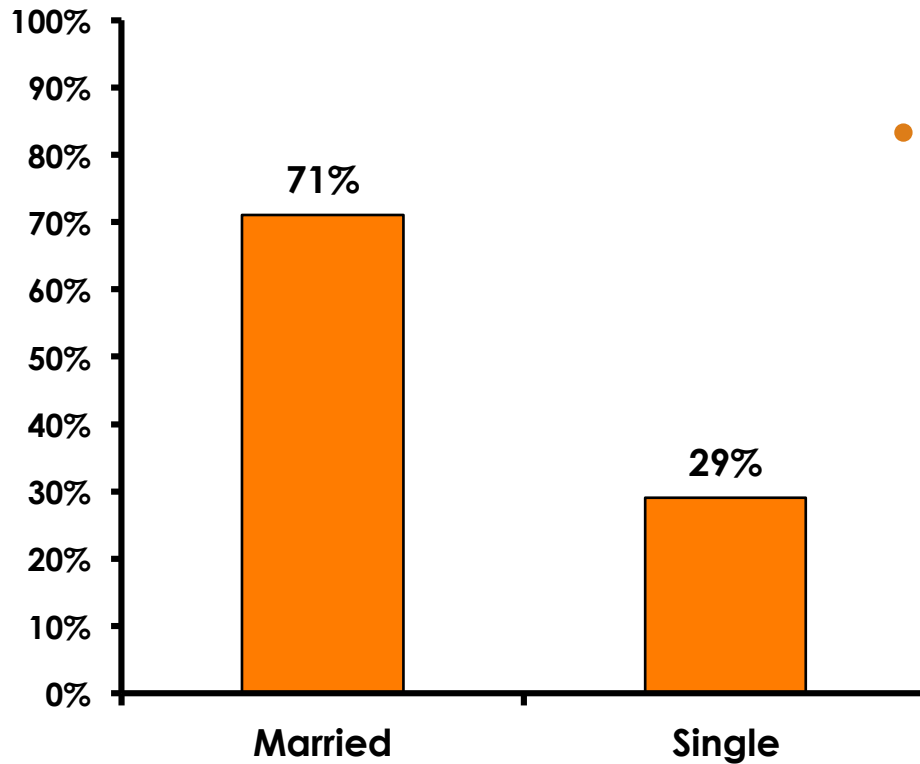
Objectives

- To monitor the effectiveness of the Korean seasonal campaigns in attracting Korean visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Korea marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

SECTION 1

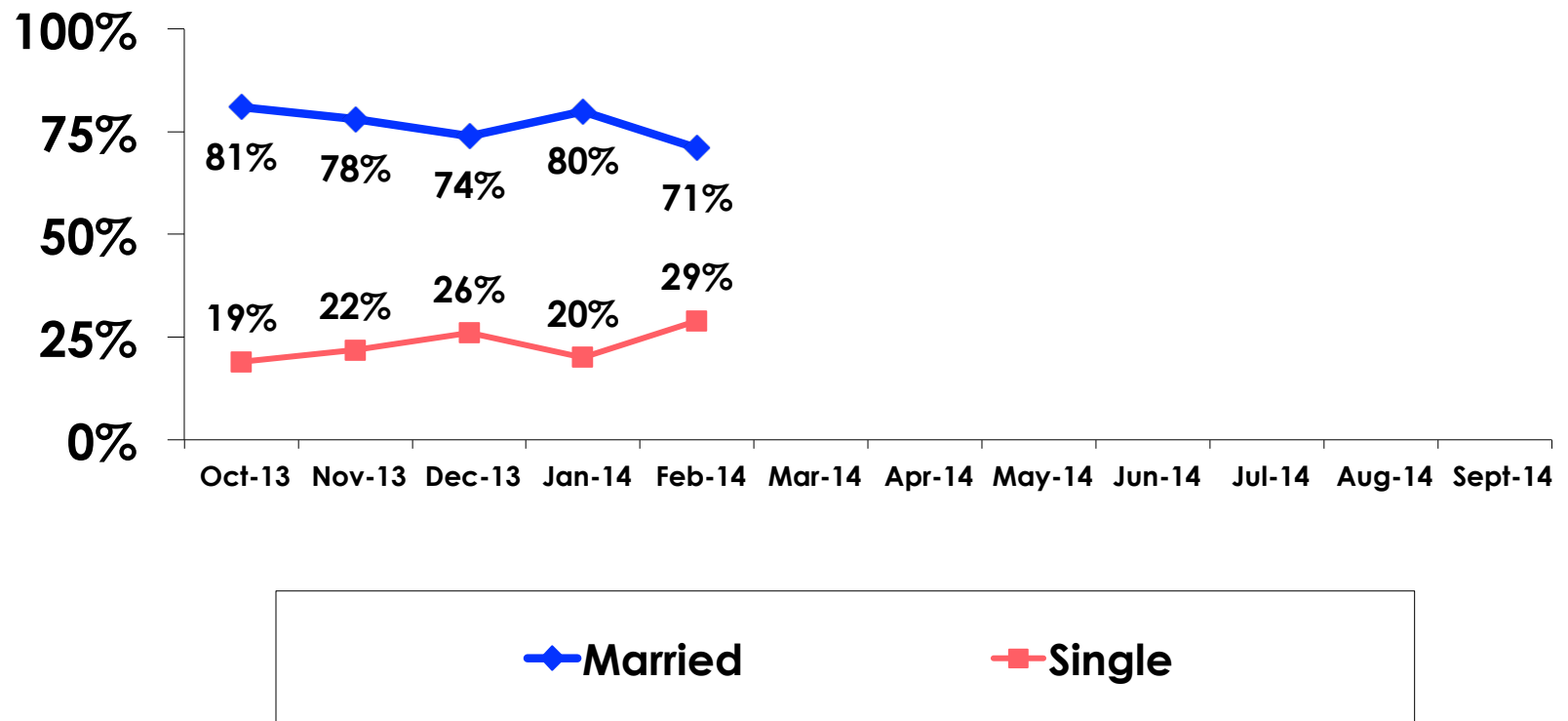
PROFILE OF RESPONDENTS

Marital Status - Overall

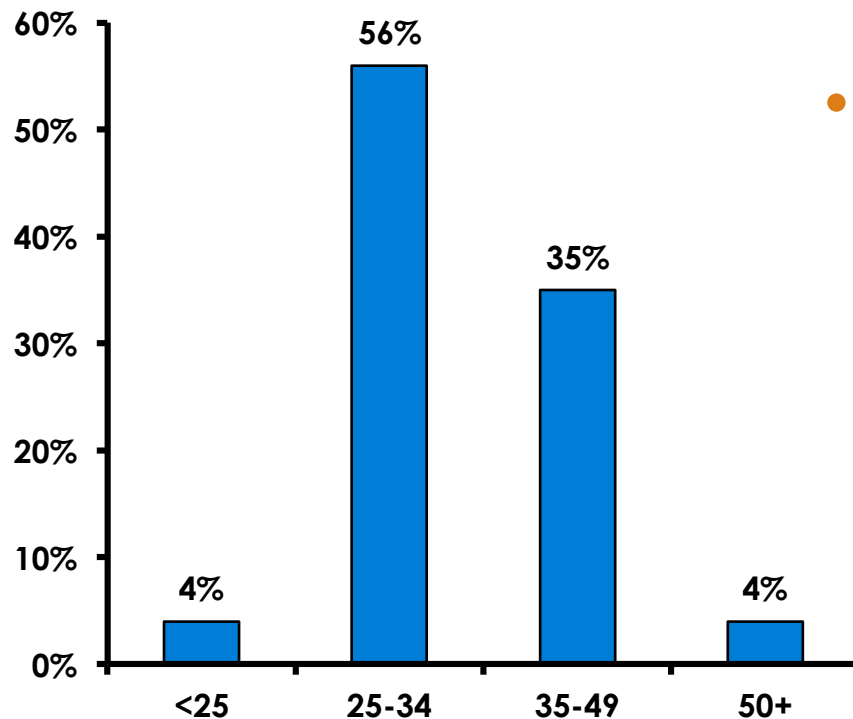


- Majority of Korean visitors are married.

Marital Status

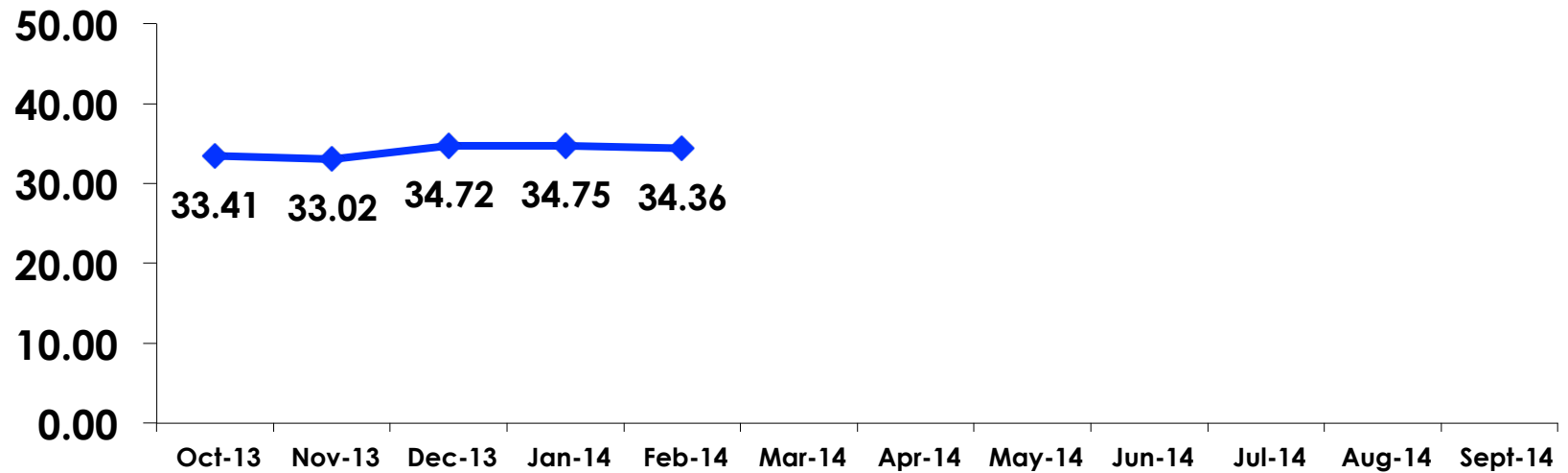


Age - Overall

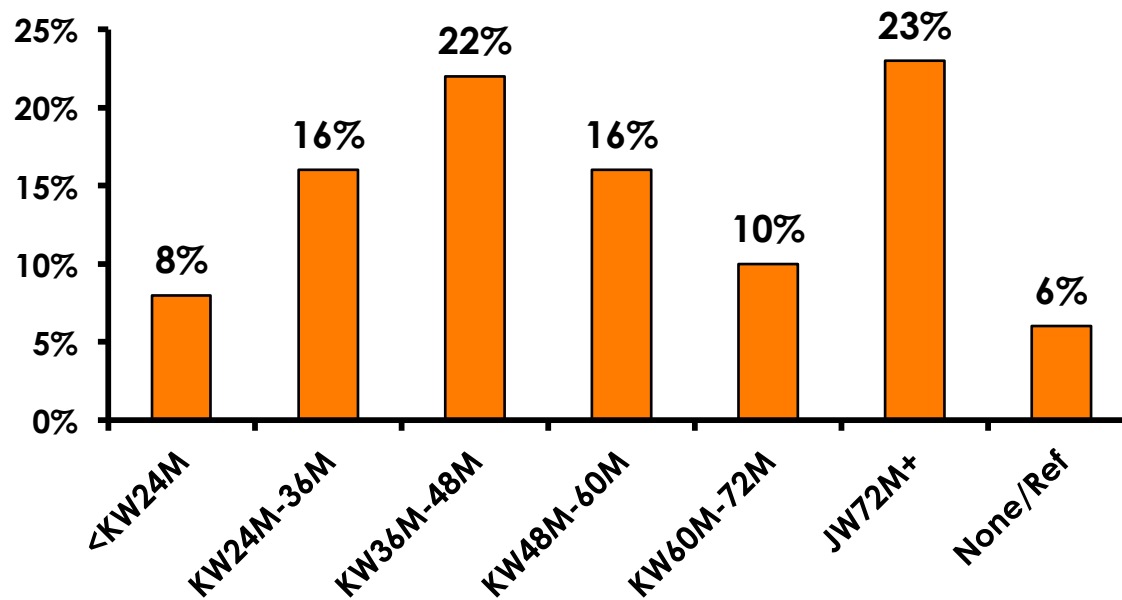


- The average age of the respondents is 34.36 years of age.

Average Age

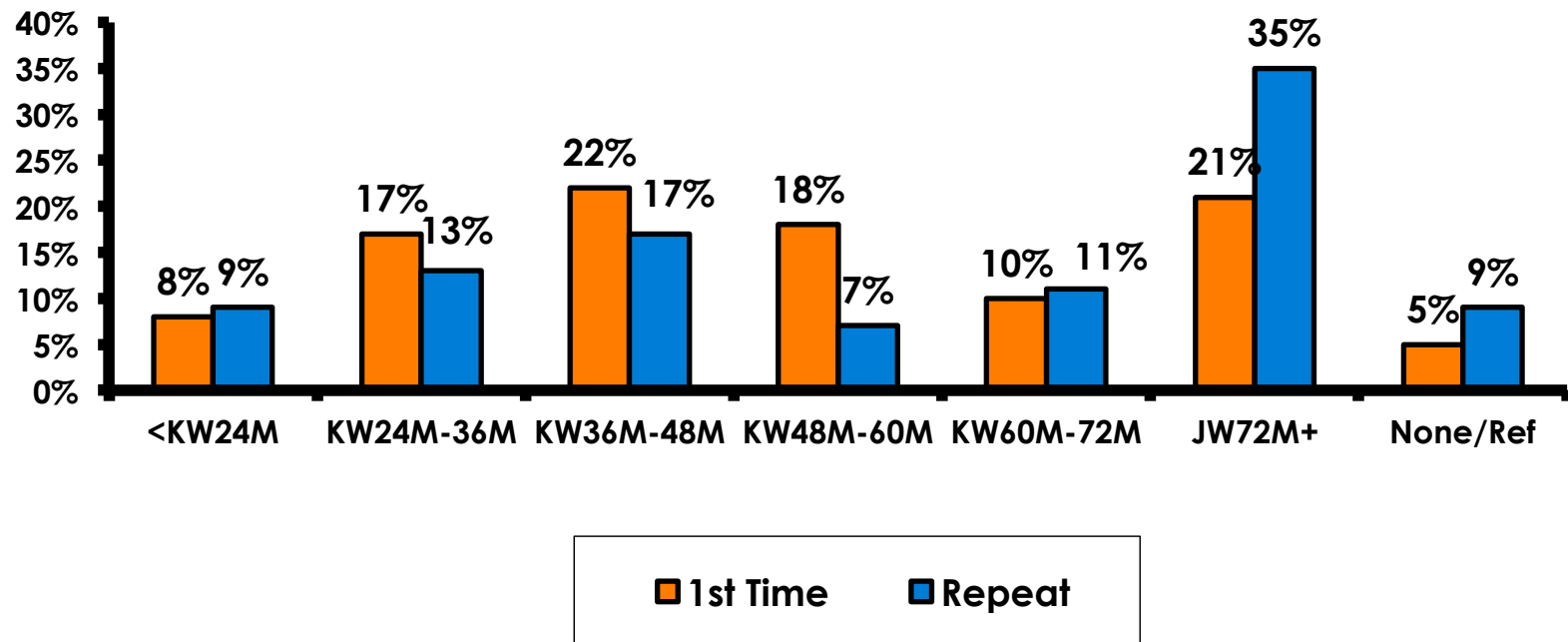


Personal Income



• KW1,069.60=\$1

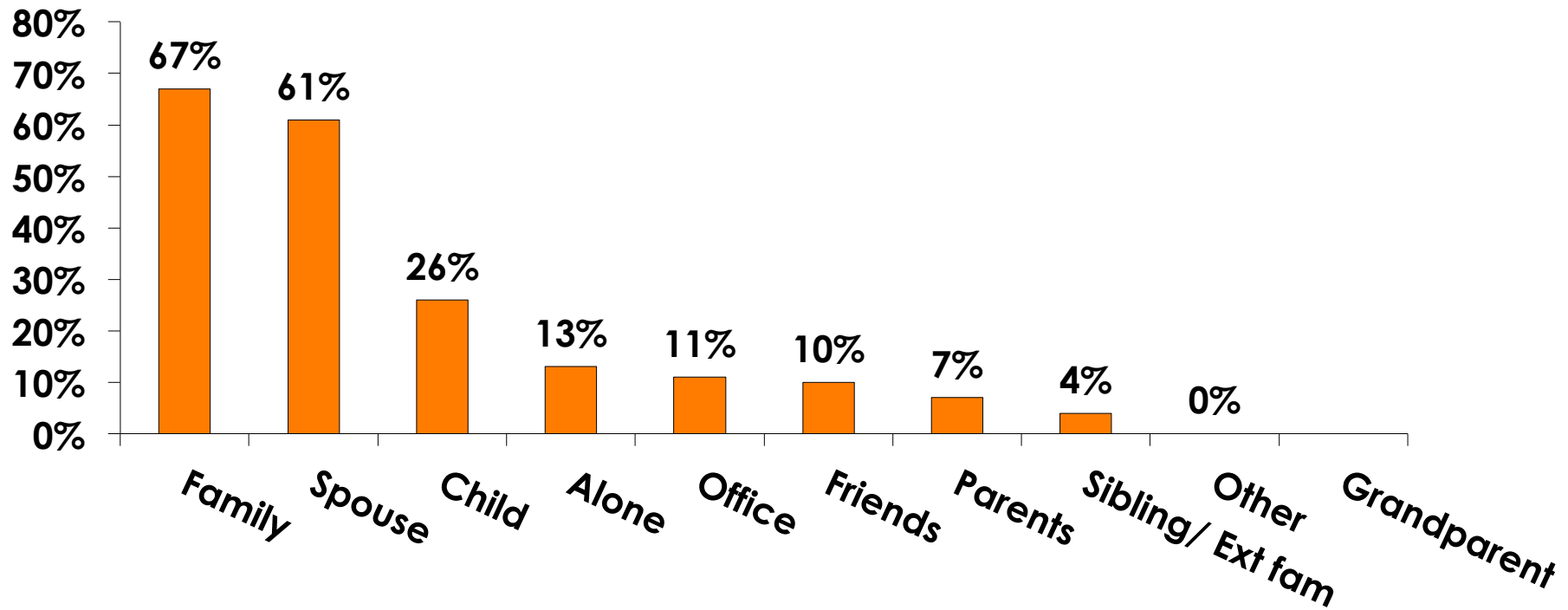
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	5	2	3		4		1
		Column N %	2%	1%	2%		2%		7%
	KW12.0M-KW24.0M	Count	20	6	14	3	10	5	2
		Column N %	6%	4%	8%	21%	5%	4%	14%
	KW24.0M-KW36.0M	Count	54	25	29	1	40	11	
		Column N %	16%	15%	17%	7%	22%	10%	
	KW36.0M-KW48.0M	Count	71	27	44	3	44	22	2
		Column N %	22%	17%	26%	21%	24%	20%	14%
	KW48.0M-KW60.0M	Count	54	28	26	5	29	19	1
		Column N %	16%	17%	16%	36%	16%	17%	7%
	KW60.0M-KW72.0M	Count	32	21	11		19	11	1
		Column N %	10%	13%	7%		10%	10%	7%
	KW72.0M+	Count	75	45	30		27	42	6
		Column N %	23%	28%	18%		15%	38%	43%
	No Income	Count	19	9	10	2	13	2	1
		Column N %	6%	6%	6%	14%	7%	2%	7%
Total		Count	330	163	167	14	186	112	14

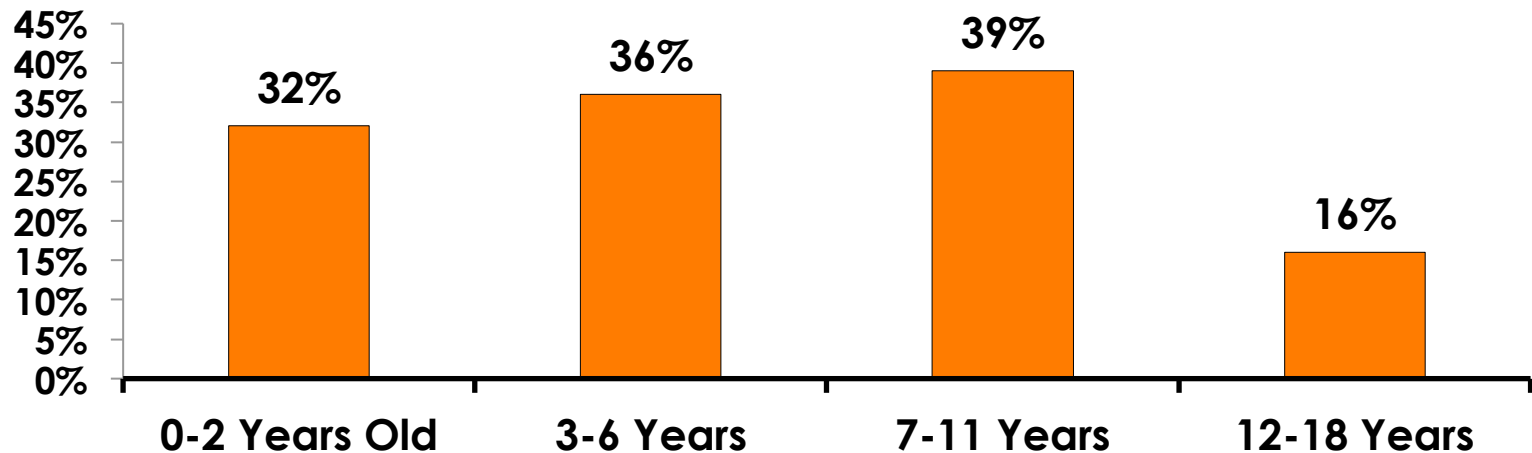
Travel Companions



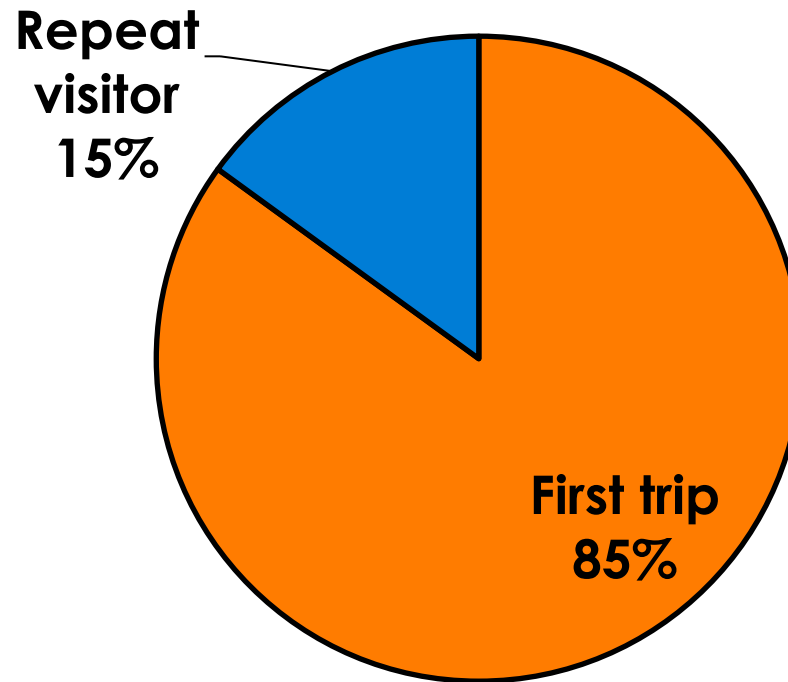
Number of Children Travel Party

N=90 total respondents traveling with children.

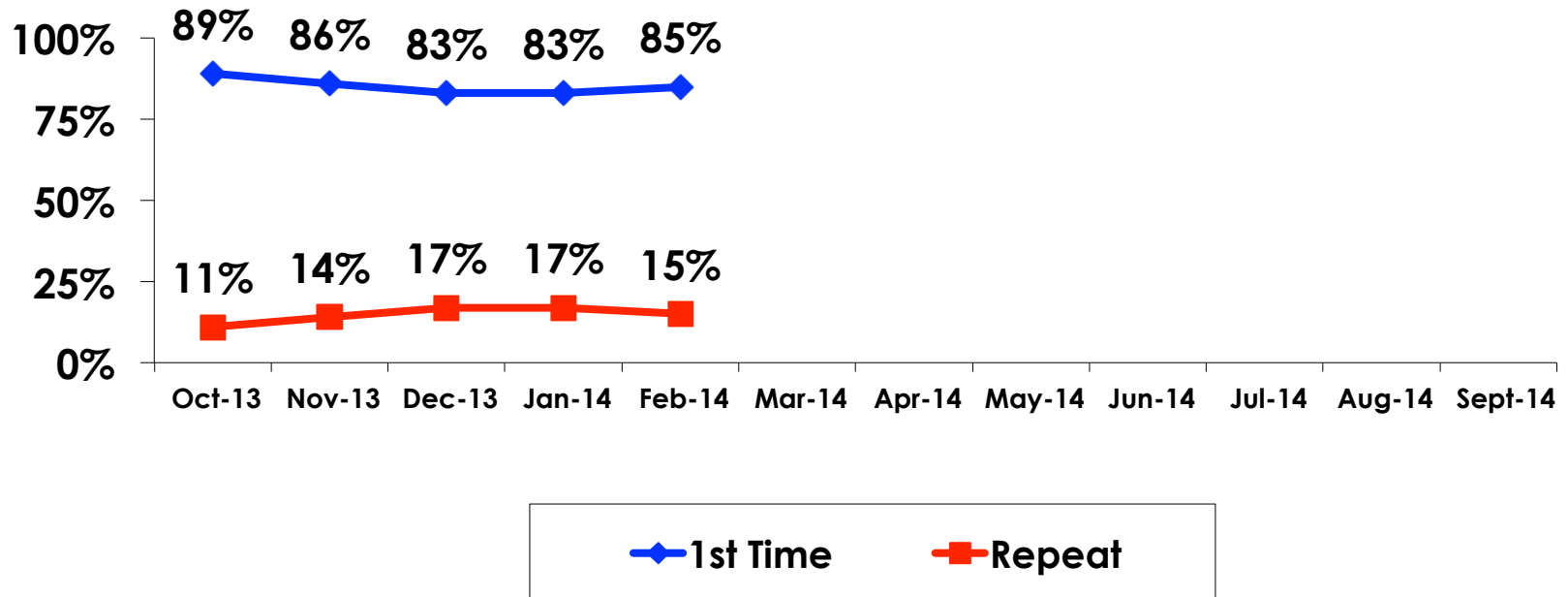
(Of those N=90 respondents, there is a total of 124 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam

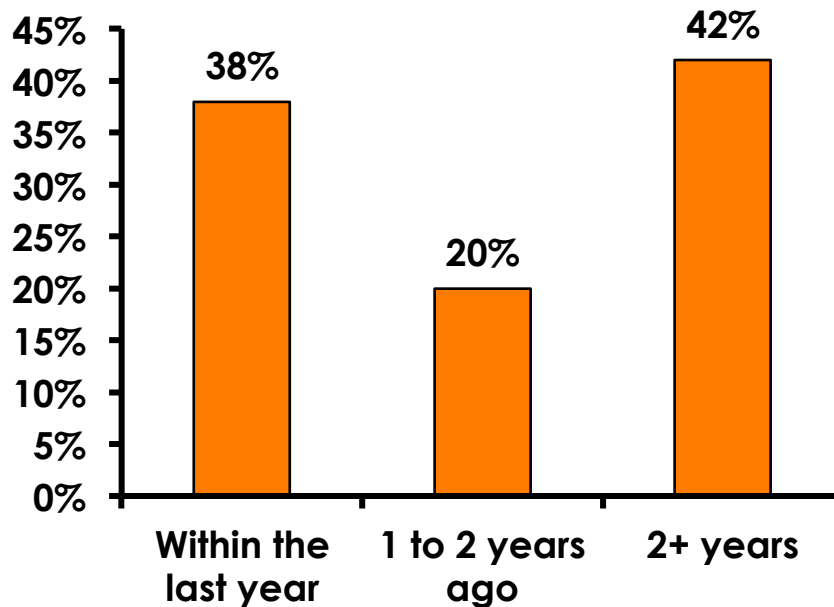


Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	175	156	19
		Column N %	50%	52%	37%
	Female	Count	175	143	32
		Column N %	50%	48%	63%
AGE	Total	Count	350	299	51
	18-24	Count	15	13	2
		Column N %	4%	4%	4%
	25-34	Count	194	175	19
		Column N %	56%	59%	39%
	35-49	Count	122	96	26
		Column N %	35%	32%	53%
	50+	Count	15	13	2
		Column N %	4%	4%	4%
	Total	Count	346	297	49

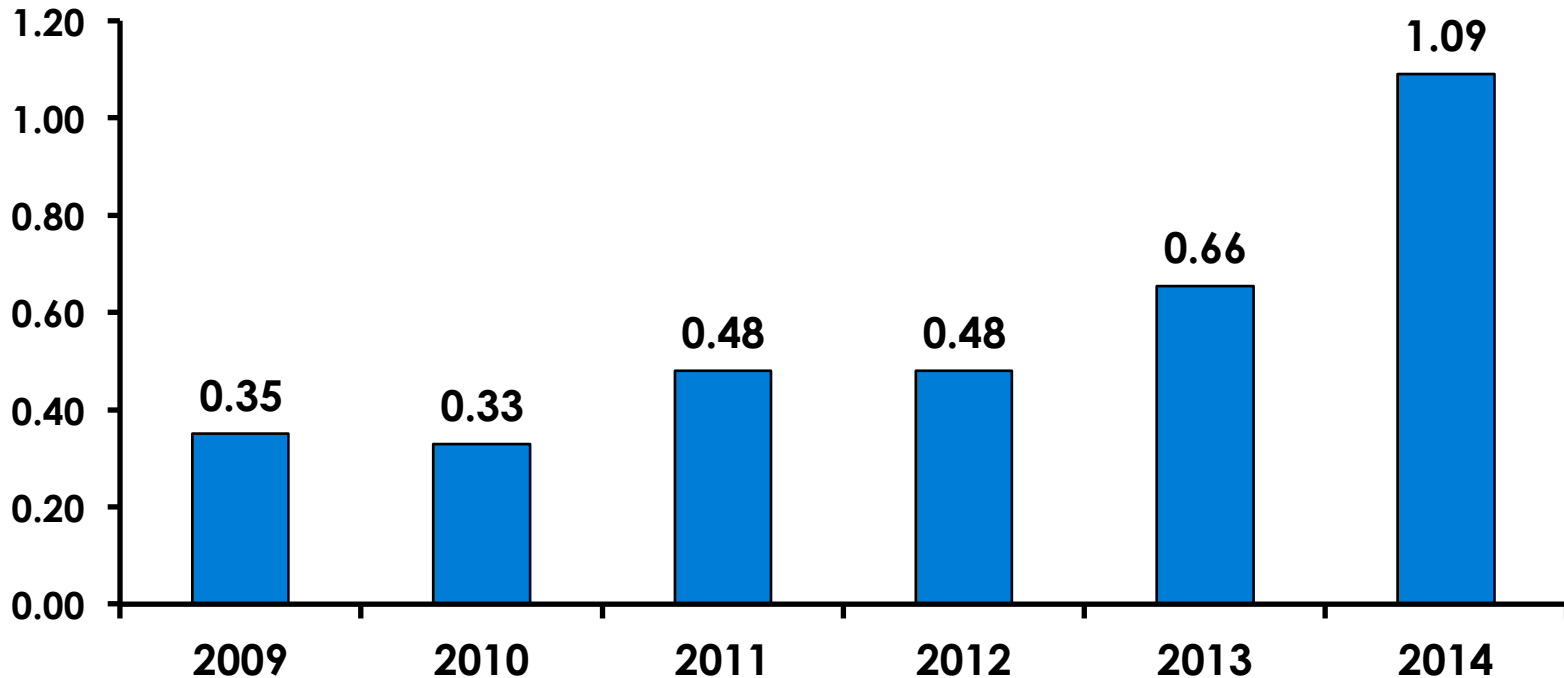
Repeat Visitors Last Trip

n = 50



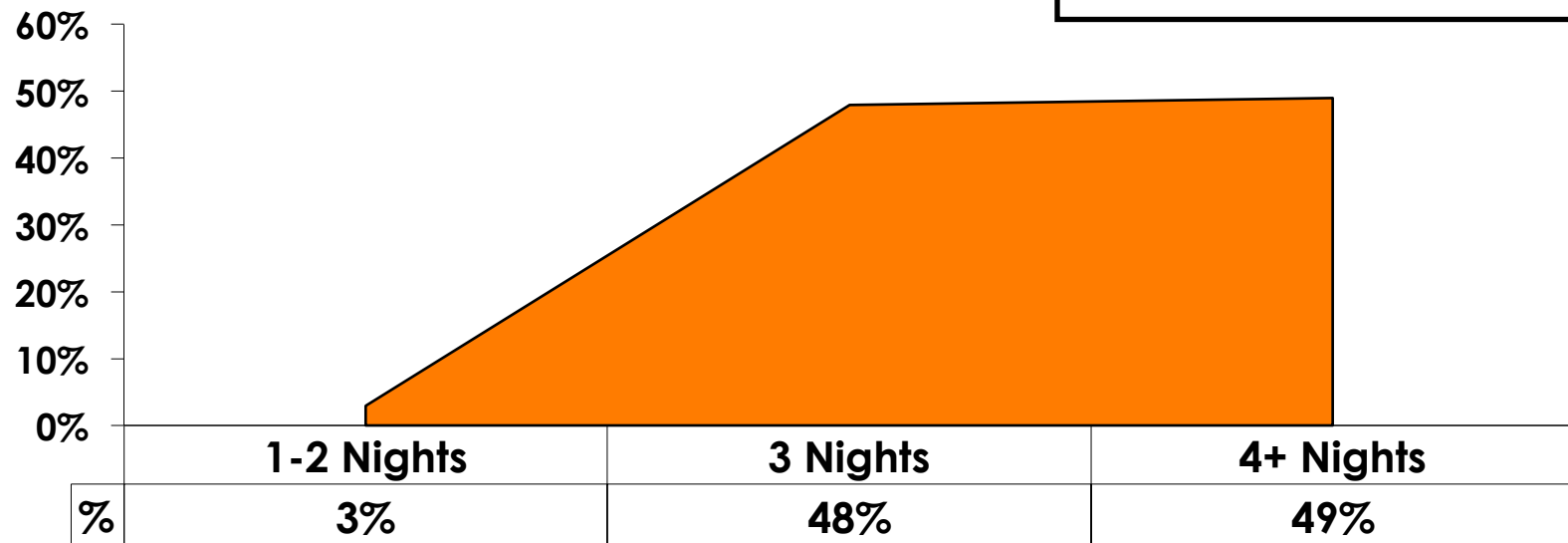
- The average repeat visitor has been to Guam 2.68 times.
- More than half of repeat visitors have been here within the last year.

Average Number Overnight Trips (2009-2014) (2 nights or more)

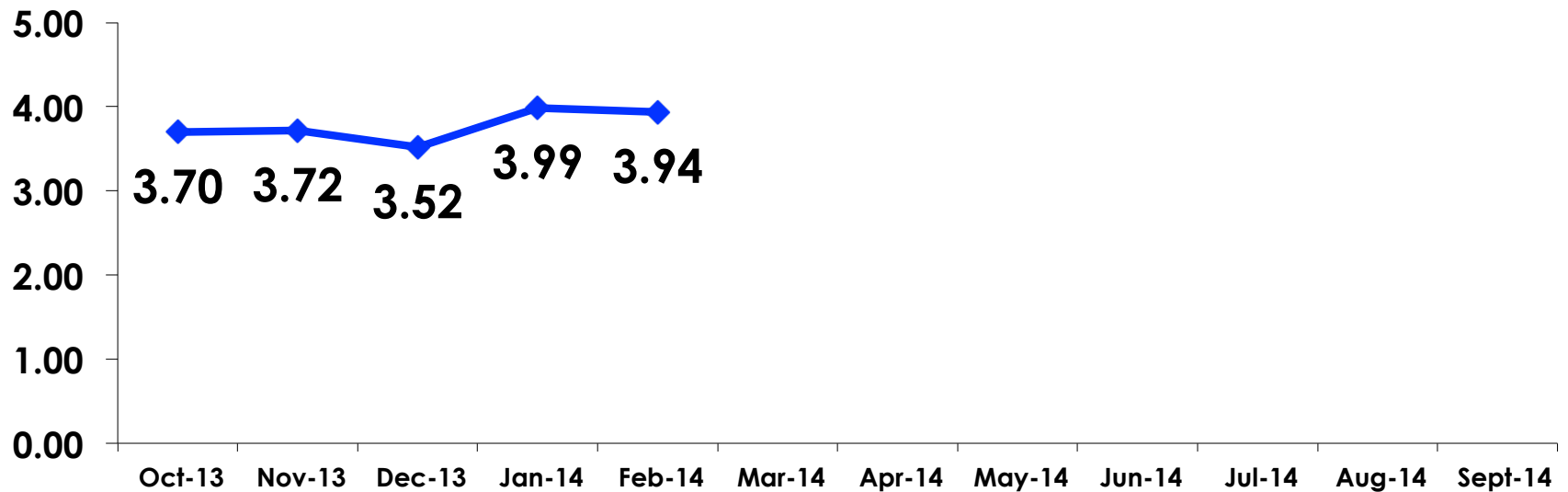


Length of Stay

Mean = 3.94 Days
Median = 3.0 Days



Average Length of Stay

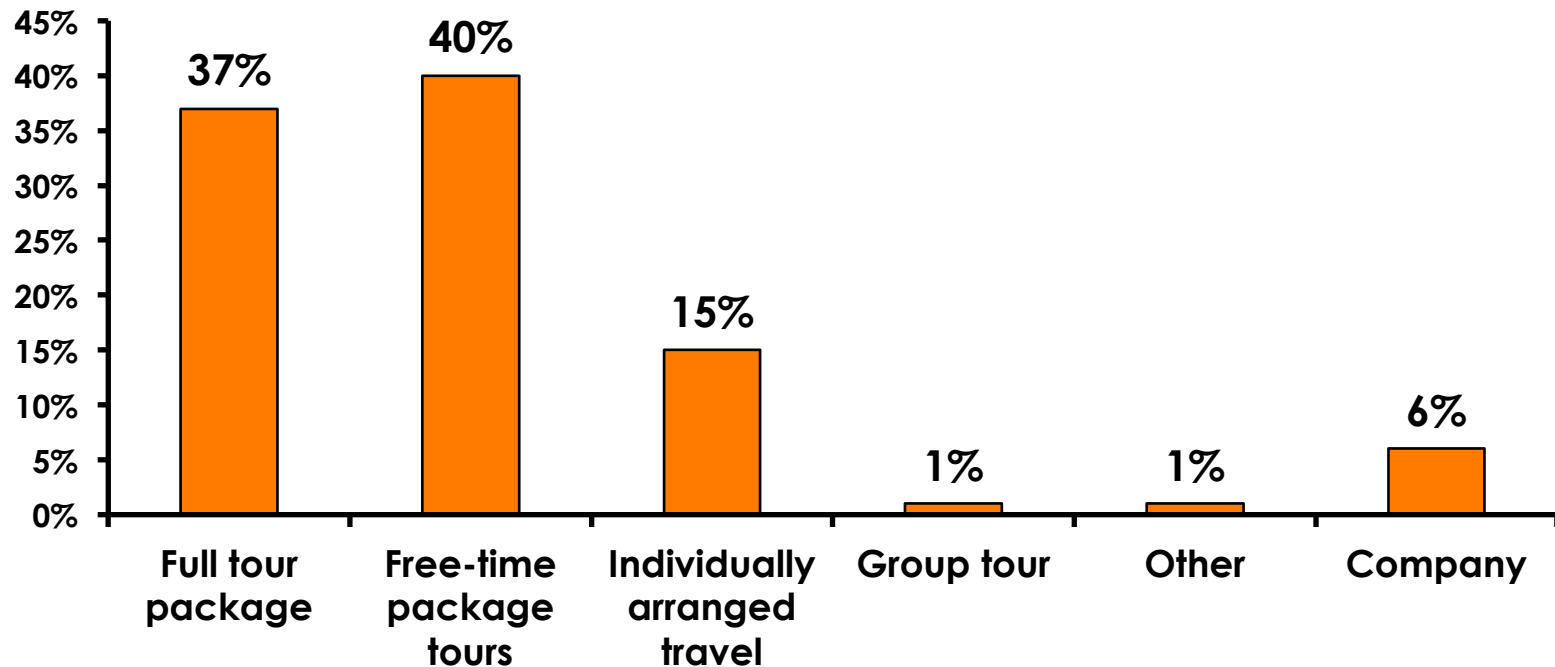


Occupation by Income

		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%		25%	45%	24%	34%	23%	38%	6%
	Self-employed	16%	40%	5%	9%	17%	15%	23%	20%	
	Professional/ Specialist/ Tech	12%		10%	13%	13%	13%	10%	15%	
	Housewife/ Homemaker	10%		25%	4%	15%	9%	6%	4%	13%
	Service worker/ Private hse worker	5%		20%	8%	8%	2%		4%	
	Manager/ Admin	4%	20%		4%	1%	4%	3%	7%	
	Sales worker/ Clerical	4%		5%	4%	8%	4%		1%	
	Student	3%		10%	2%				1%	31%
	Professor/ Teacher/ After-school	3%			2%	1%	6%	10%	1%	
	Unemployed	2%							1%	44%
	Skilled worker	2%			2%	3%	2%	10%	1%	
	Govt- office worker non-mgr	2%	20%		2%	3%		6%	3%	
	Freelancer	2%			2%	1%	6%	3%		
	Govt- Executive	2%			2%	1%	4%	6%		
	Other	1%			2%		2%			6%
	Govt- Manager	1%				3%			1%	
	Judicial	0%							1%	
	Retired	0%	20%							
Total	Count	332	5	20	53	71	53	31	74	16

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

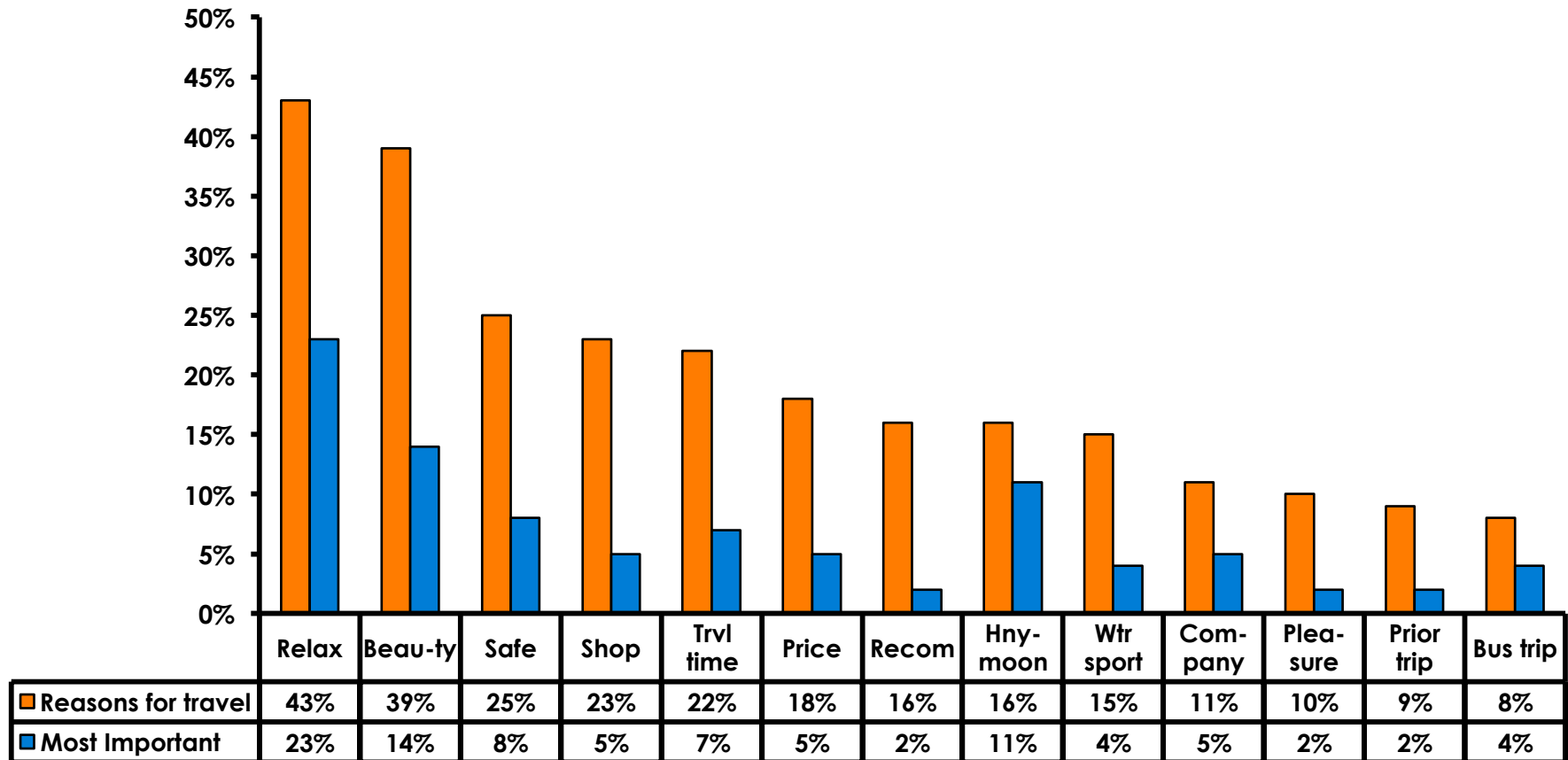


Accommodation by Income

Average length of stay: 3.94 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	38%	40%	35%	43%	30%	49%	28%	39%	21%
	Hilton Guam Resort	11%		10%	7%	13%	11%	13%	12%	5%
	Sheraton Laguna Guam	11%		10%	11%	11%	15%	13%	8%	11%
	Hyatt Regency Guam	10%	40%	15%	6%	8%	6%	9%	13%	21%
	Hotel Nikko Guam	6%		5%	9%	8%		6%	7%	11%
	Onward Beach Resort	6%		10%	7%	1%	9%		5%	11%
	Outrigger Guam Resort	4%		5%	2%	7%	4%		5%	
	Home stay/ friend/ relative	3%			4%	4%		3%	1%	11%
	Royal Orchid Guam	2%			4%	1%		6%	1%	
	Bayview Hotel	2%			4%			6%	1%	5%
	Guam Reef & Olive Spa	1%				4%		6%		
	Other	1%	20%	5%	2%	1%				
	Westin Resort Guam	1%					6%		1%	
	Leo Palace Resort	1%						9%	1%	
	Oceanview Hotel	1%			2%	1%			1%	
	Condo	1%				1%			1%	
	Pacific Bay Hotel	1%				3%				
	Holiday Resort Guam	1%				1%				5%
	Guam Marriott Resort	1%				3%				
	Fiesta Resort Guam	0%							1%	
	Apartment	0%		5%						
	Total	Count	349	5	20	54	71	53	32	75

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Relaxation,
- Guam's natural beauty/ beaches and
- 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	43%	33%	38%	49%	53%	44%	41%
	Natural beauty	39%	40%	39%	39%	47%	37%	41%
	Safe	25%	27%	21%	27%	47%	22%	27%
	Shopping	23%	27%	24%	21%	13%	23%	23%
	Short travel time	22%	13%	22%	26%	7%	17%	27%
	Price	18%	40%	20%	14%	13%	19%	18%
	Recomm- friend/family/trvl agnt	16%	33%	16%	14%	20%	13%	19%
	Honeymoon	16%	40%	20%	9%		20%	13%
	Water sports	15%	20%	12%	21%		13%	16%
	Company Sponsored	11%		10%	12%	7%	9%	13%
	Pleasure	10%	13%	9%	10%	20%	9%	10%
	Previous trip	9%	13%	6%	12%	7%	6%	11%
	Company/ Business Trip	8%	7%	7%	10%	13%	7%	9%
	Organized sports	4%	7%	3%	5%	7%	5%	2%
	Golf	4%	7%	5%	2%	7%	5%	2%
	Visit friends/ Relatives	3%	27%	2%	2%	7%	2%	5%
	Other	3%	7%	2%	4%	7%	4%	2%
	Scuba	3%	7%	4%	2%		3%	2%
	Married/ Attn wedding	2%		4%				4%
	Career Cert/ Testing	1%		1%	1%			1%
Total	Count	349	15	194	121	15	174	175

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	43%	60%	45%	31%	39%	41%	47%	56%	21%
	Natural beauty	39%	40%	60%	48%	27%	35%	38%	44%	32%
	Safe	25%	40%	35%	19%	14%	28%	34%	29%	26%
	Shopping	23%	20%	20%	31%	14%	20%	41%	21%	32%
	Short travel time	22%	40%	15%	20%	20%	17%	22%	29%	16%
	Price	18%	40%	25%	19%	11%	24%	13%	15%	37%
	Recomm- friend/family/trvl agnt	16%	60%	25%	17%	17%	19%	6%	13%	16%
	Honeymoon	16%		25%	19%	27%	20%	9%	5%	16%
	Water sports	15%	20%	20%	17%	11%	13%	9%	13%	16%
	Company Sponsored	11%		15%	20%	9%	13%	6%	7%	
	Pleasure	10%		15%	4%	13%	7%	9%	11%	21%
	Previous trip	9%		10%	6%	6%	6%	13%	12%	16%
	Company/ Business Trip	8%		5%	13%	14%	6%	3%	5%	5%
	Organized sports	4%	20%	5%	4%	3%	4%		5%	5%
	Golf	4%				6%	4%	13%	4%	
	Visit friends/ Relatives	3%		10%	4%	1%	2%	3%	1%	21%
	Other	3%		5%	2%	1%	4%	3%	3%	5%
	Scuba	3%	20%	5%	2%	3%	4%	3%	3%	
	Married/ Attn wedding	2%	20%	5%	2%	1%	4%		1%	
	Career Cert/ Testing	1%				1%				5%
	Total Count	349	5	20	54	70	54	32	75	19

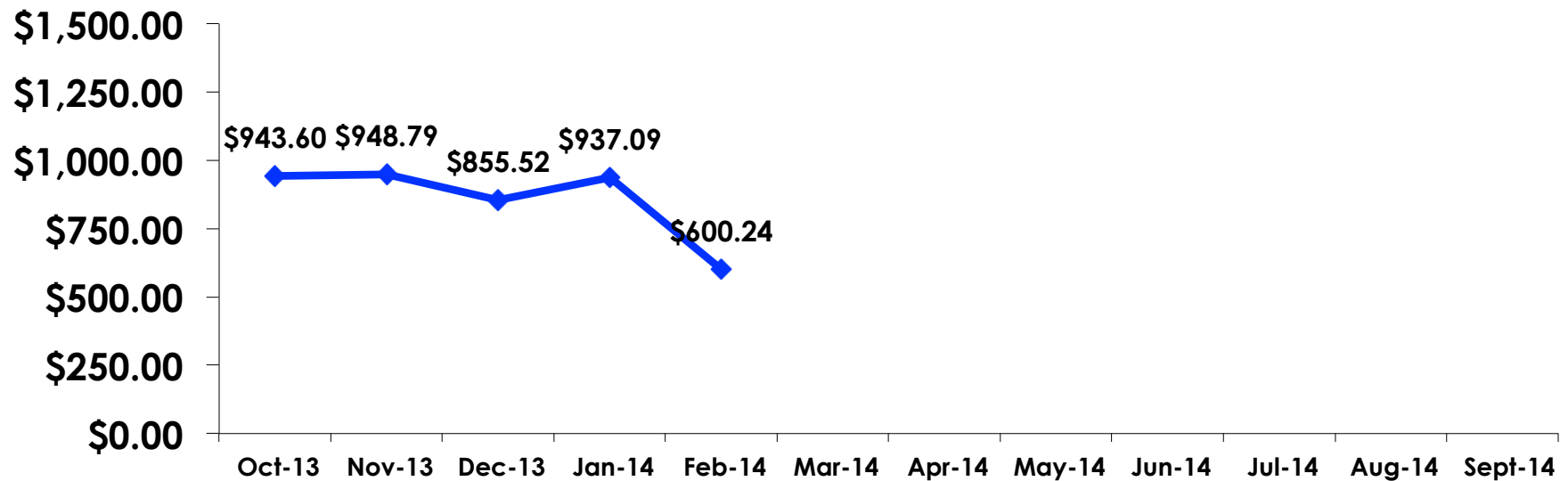
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW 1,069.60/US\$1

- \$1,318.14 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,349 = maximum (highest amount recorded for the entire sample)
- \$600.24 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person Per Trip



YTD=\$856.94

Breakdown of Prepaid Expenditures

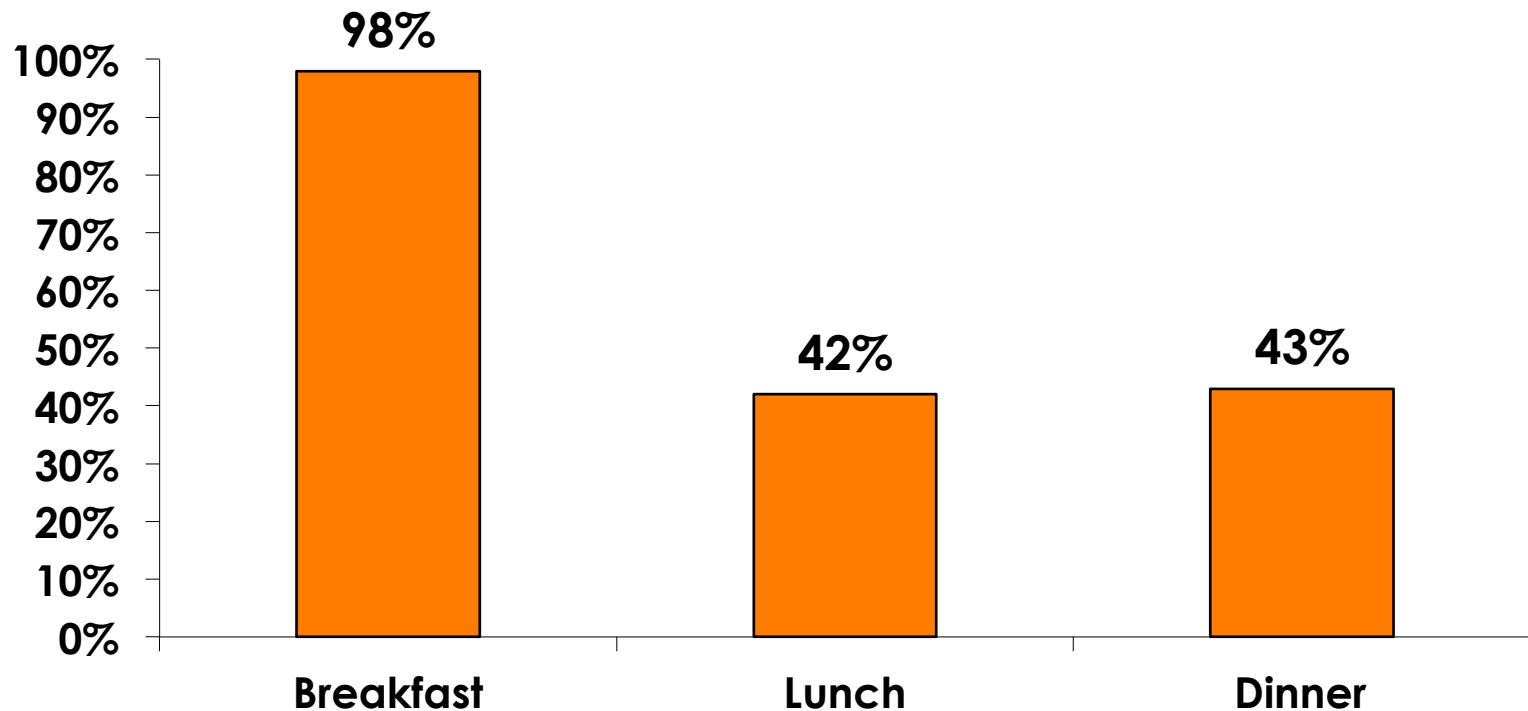
KW 1,069.60=\$1

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

	MEAN \$
Air & Accommodation package only	\$2,021.90
Air & Accommodation w/ daily meal package	\$2,283.37
Air only	\$1,201.38
Accommodation only	\$1,004.55
Accommodation w/ daily meal only	\$766.64
Food & Beverages in Hotel	\$100.50
Ground transportation – Korea	\$99.54
Ground transportation – Guam	\$161.12
Optional tours/ activities	\$272.53
Other expenses	\$506.22
Total Prepaid	\$1,318.14

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package
n=132

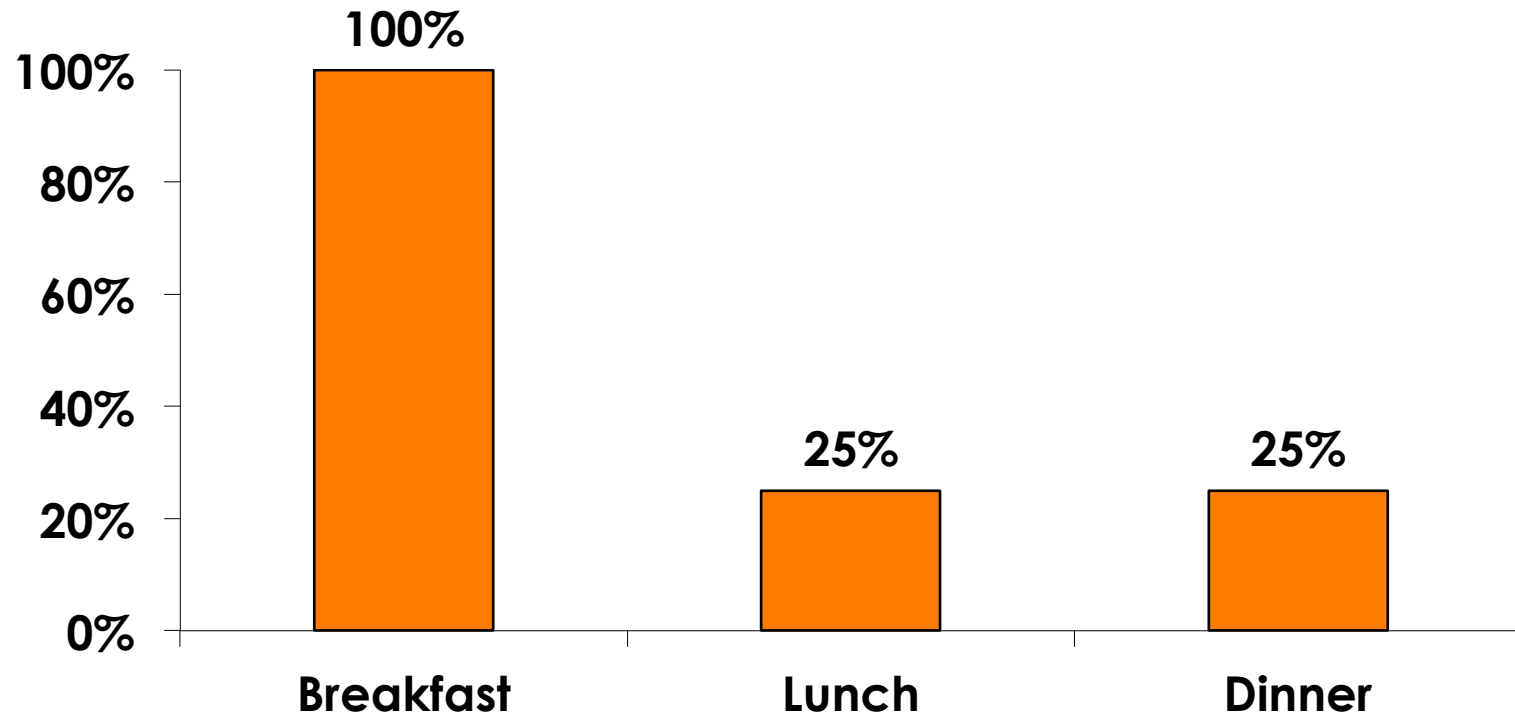


Mean=\$2,283.37 per travel party

Prepaid Meal Breakdown

Accommodations with Daily Meal Package

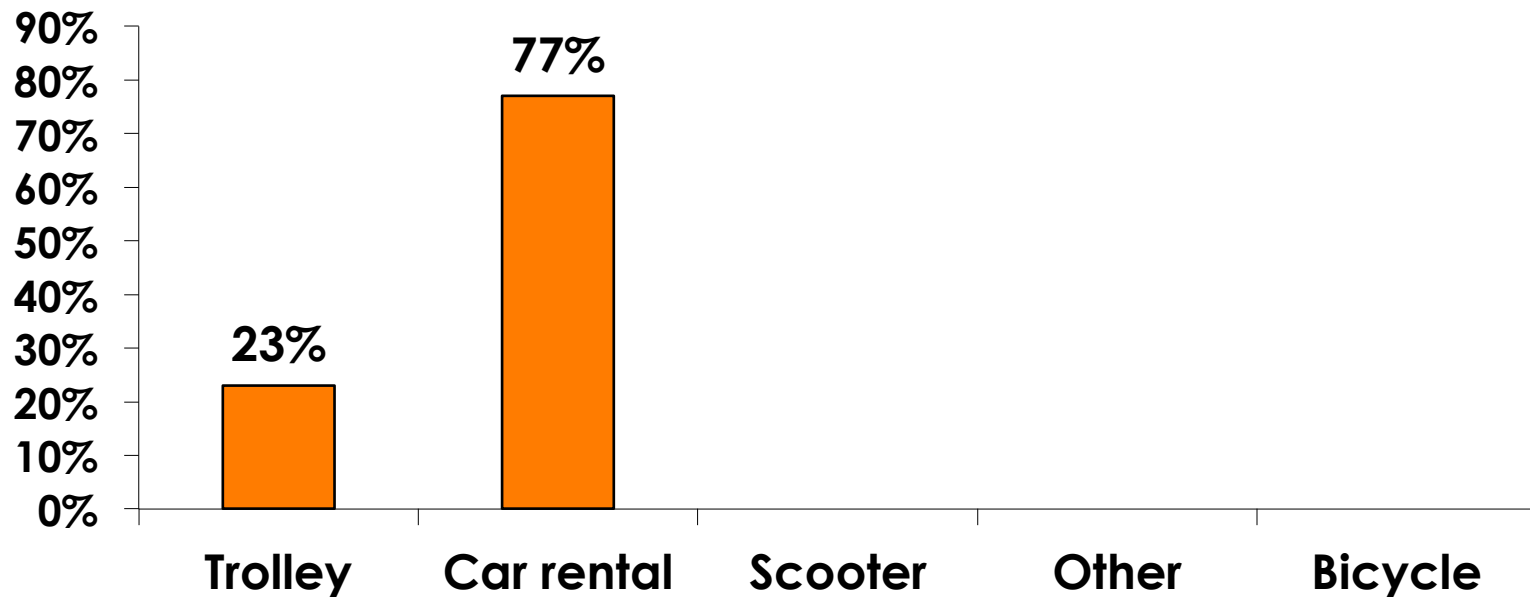
N=4



Mean=\$766.64 per travel party

Prepaid Ground Transportation

n=13

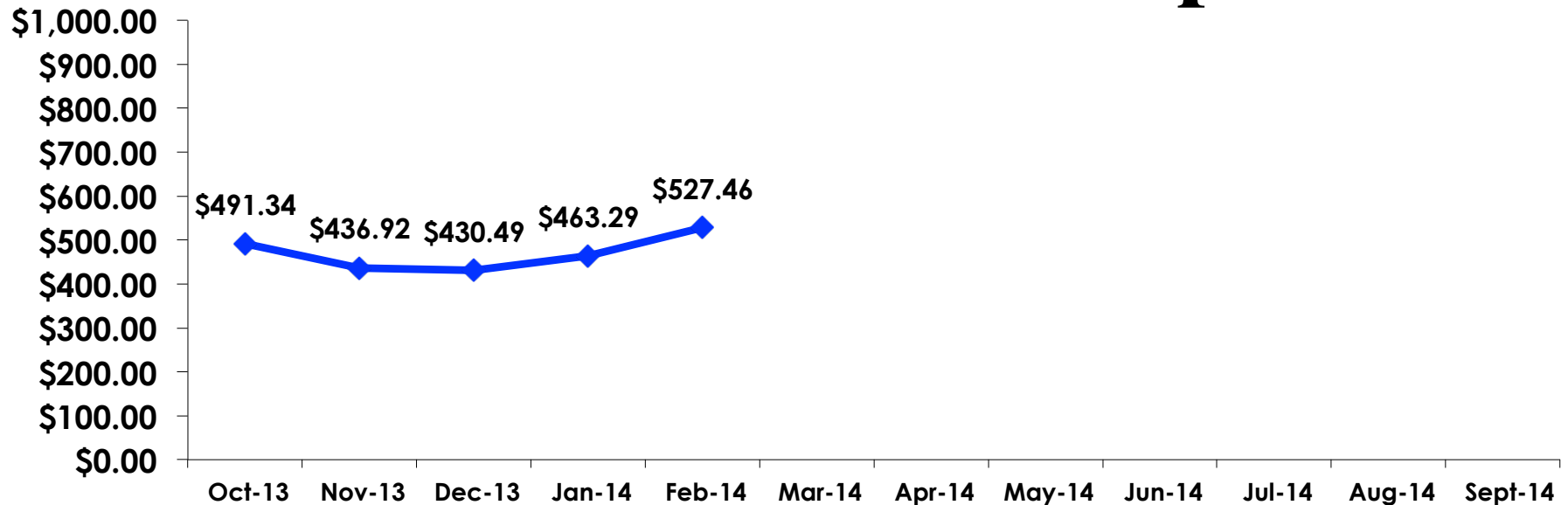


Mean=\$161.12 per travel party

On-Island Expenditures

- \$949.57 = 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)
- \$527.46 = overall mean average per person per trip on-island expenditure

On-Island Expenditures Per Person Per Trip

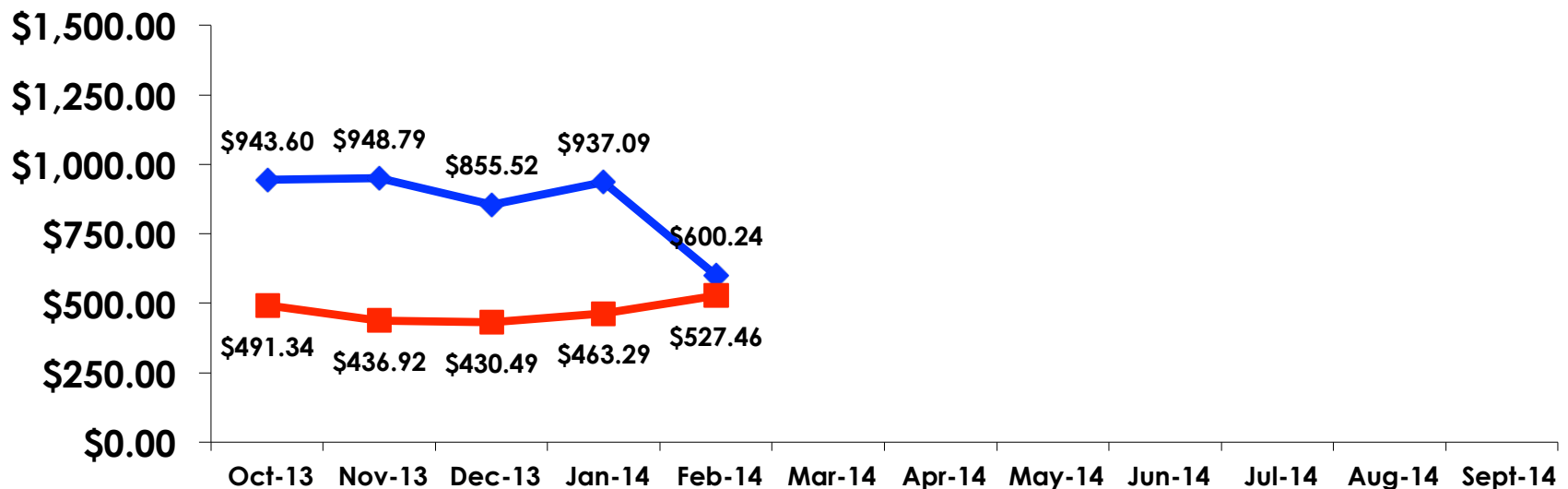


YTD = \$469.88

Prepaid / On-Island Expenditures Per Person

Prepaid YTD = \$856.94

On-Isle YTD = \$469.88



◆ 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	\$527.46	\$499.93	\$555.00	\$212.22	\$521.63	\$483.07	\$399.00	\$788.61	\$569.58	\$482.55	\$716.00
	Median	\$300	\$300	\$300	\$100	\$300	\$320	\$68	\$668	\$400	\$178	\$130
	Minimum	\$0	\$0	\$0	\$37	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$6,000	\$4,000	\$6,000	\$500	\$4,000	\$4,000	\$1,780	\$3,000	\$3,000	\$6,000	\$3,250

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$50.57	\$37.70	\$63.43	\$13.33	\$57.86	\$46.96	\$26.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.56	\$34.59	\$26.53	\$16.00	\$34.21	\$22.53	\$62.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$67.14	\$81.33	\$52.94	\$20.00	\$73.04	\$58.43	\$86.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$94.88	\$103.76	\$86.01	\$58.00	\$100.71	\$79.35	\$194.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.40	\$213.23	\$229.58	\$148.00	\$209.95	\$266.73	\$40.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- OTHER	Mean	\$154.53	\$154.54	\$154.52	\$276.67	\$151.52	\$150.86	\$61.73
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$54.06	\$59.99	\$48.13	\$28.67	\$56.38	\$56.07	\$25.93
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$278.89	\$275.17	\$282.61	\$637.33	\$252.27	\$292.98	\$224.40
	Median	\$2	\$0	\$10	\$20	\$8	\$5	\$0
TOTAL	Mean	\$949.57	\$957.14	\$942.00	\$1,198.00	\$921.27	\$995.39	\$679.67
	Median	\$600	\$630	\$600	\$700	\$630	\$600	\$130

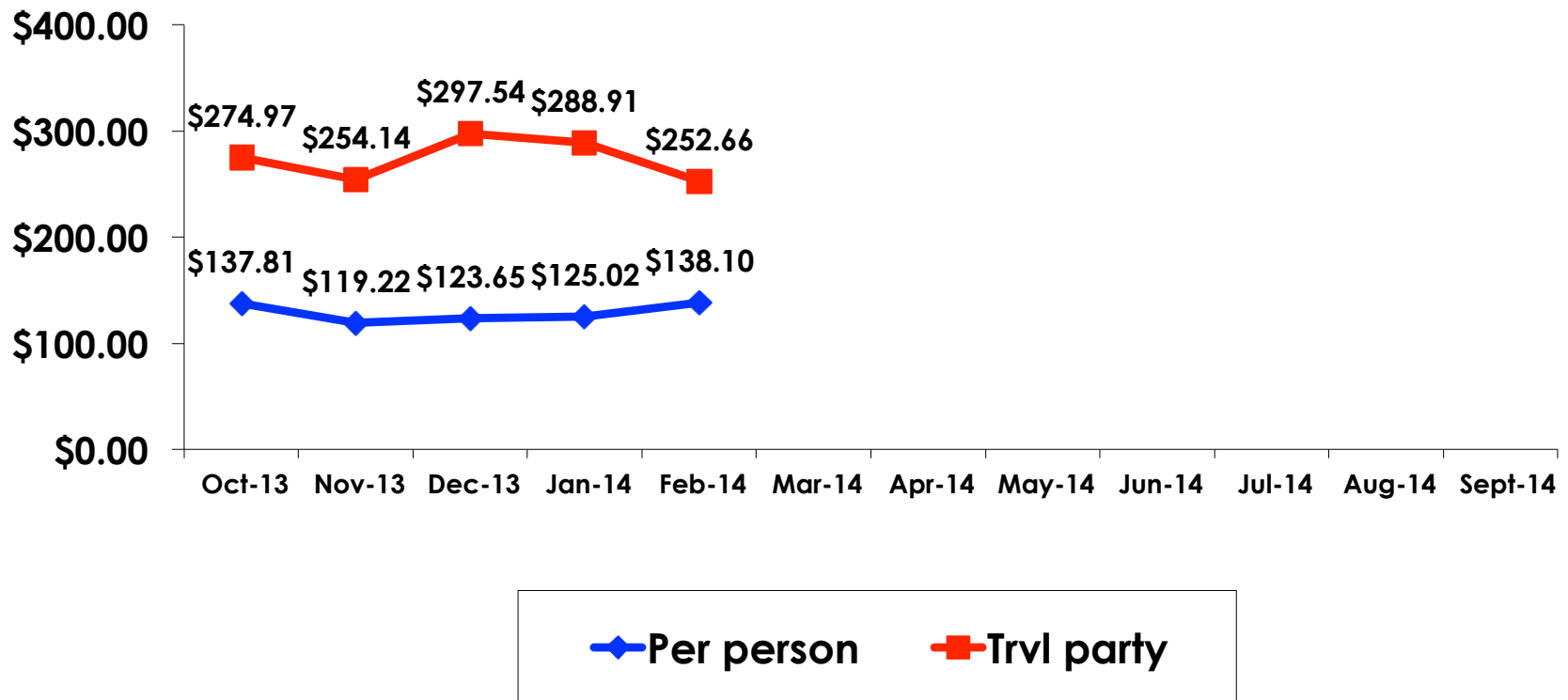
On-Island Expenditures

First time vs. Repeat

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$50.57	\$44.21	\$87.84
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.56	\$30.85	\$28.88
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$67.14	\$68.21	\$60.84
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$94.88	\$103.02	\$47.18
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$221.40	\$210.47	\$285.49
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$154.53	\$151.79	\$170.59
	Median	\$0	\$0	\$0
TRANS	Mean	\$54.06	\$52.18	\$65.08
	Median	\$0	\$0	\$0
OTHER	Mean	\$278.89	\$277.63	\$286.27
	Median	\$2	\$10	\$0
TOTAL	Mean	\$949.57	\$935.55	\$1,031.78
	Median	\$600	\$600	\$540

On-Island Expenditures Per Person Per Day

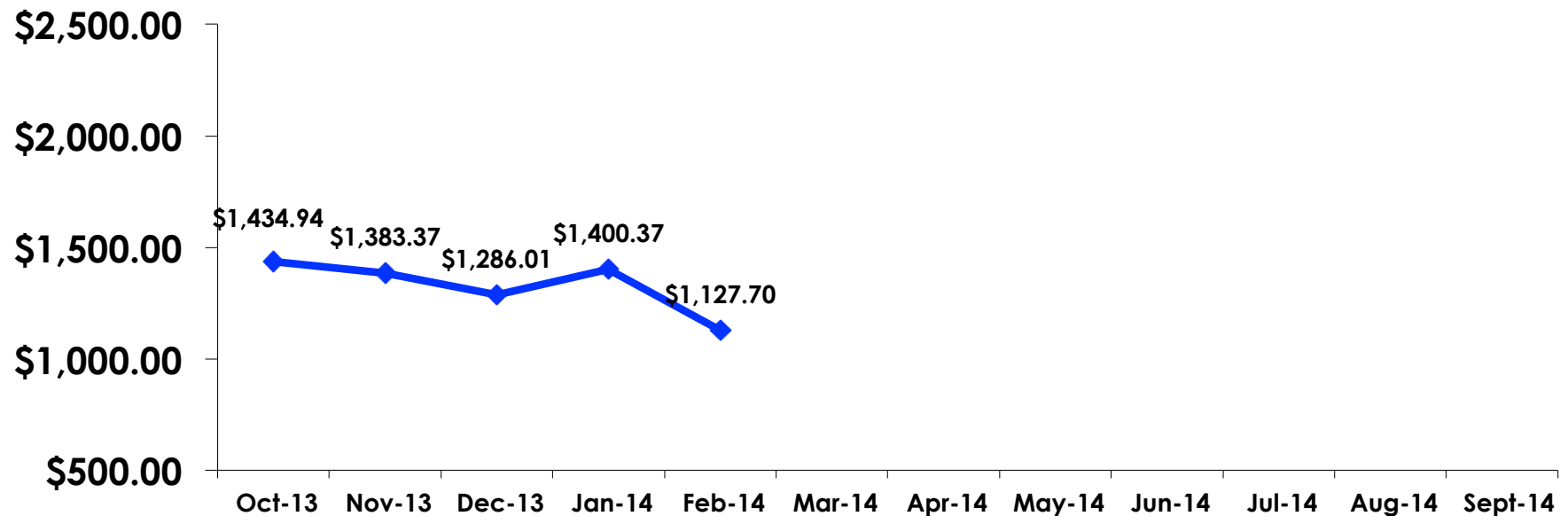
YTD Per Person = \$128.73 YTD Travel Party = \$273.73



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,127.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,767 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



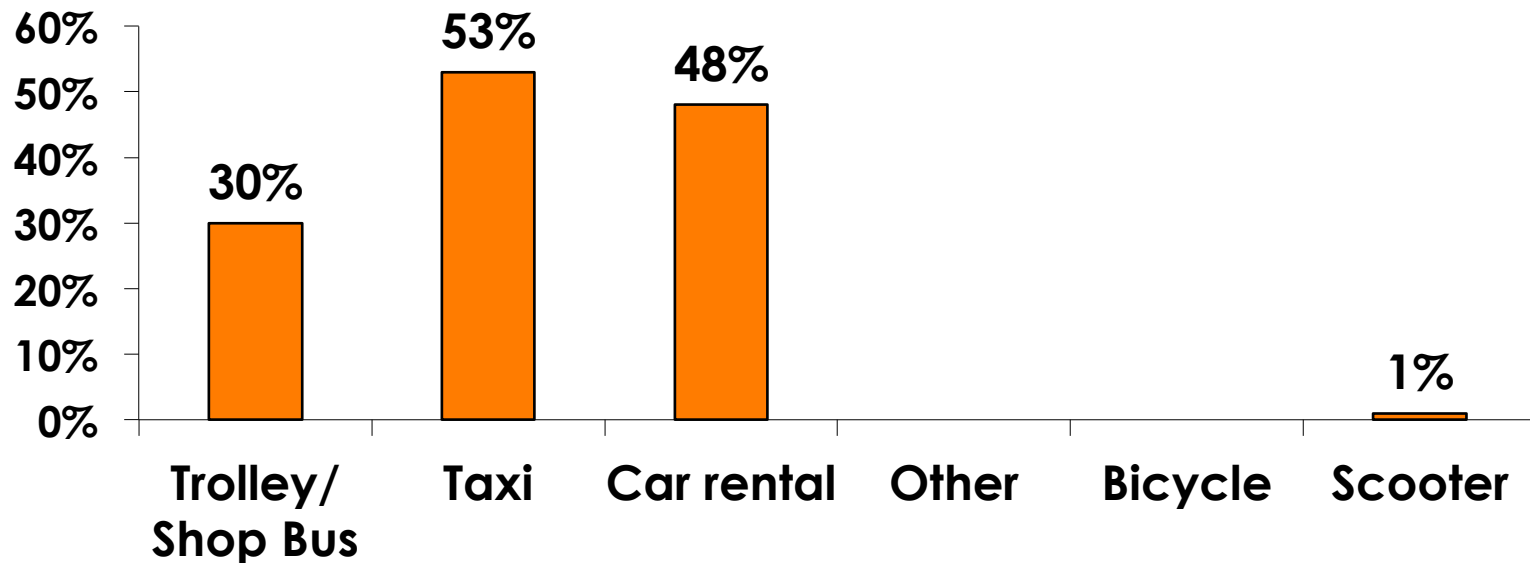
YTD=\$1,326.39

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$50.57
Food & beverage in fast food restaurant/ convenience store	\$30.56
Food & beverage at restaurants or drinking establishments outside a hotel	\$67.14
Optional tours and activities	\$94.88
Gifts/ souvenirs for yourself/companions	\$221.40
Gifts/ souvenirs for friends/family at home	\$154.53
Local transportation	\$54.06
Other expenses not covered	\$278.89
Average Total	\$949.57

Local Transportation

n=137



Mean=\$54.06 per travel party

Guam Airport Expenditures

- \$87.92 = 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	\$8.16
Gifts/Souvenirs Self	\$27.58
Gifts/Souvenirs Others	\$52.18
Total	\$87.92

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

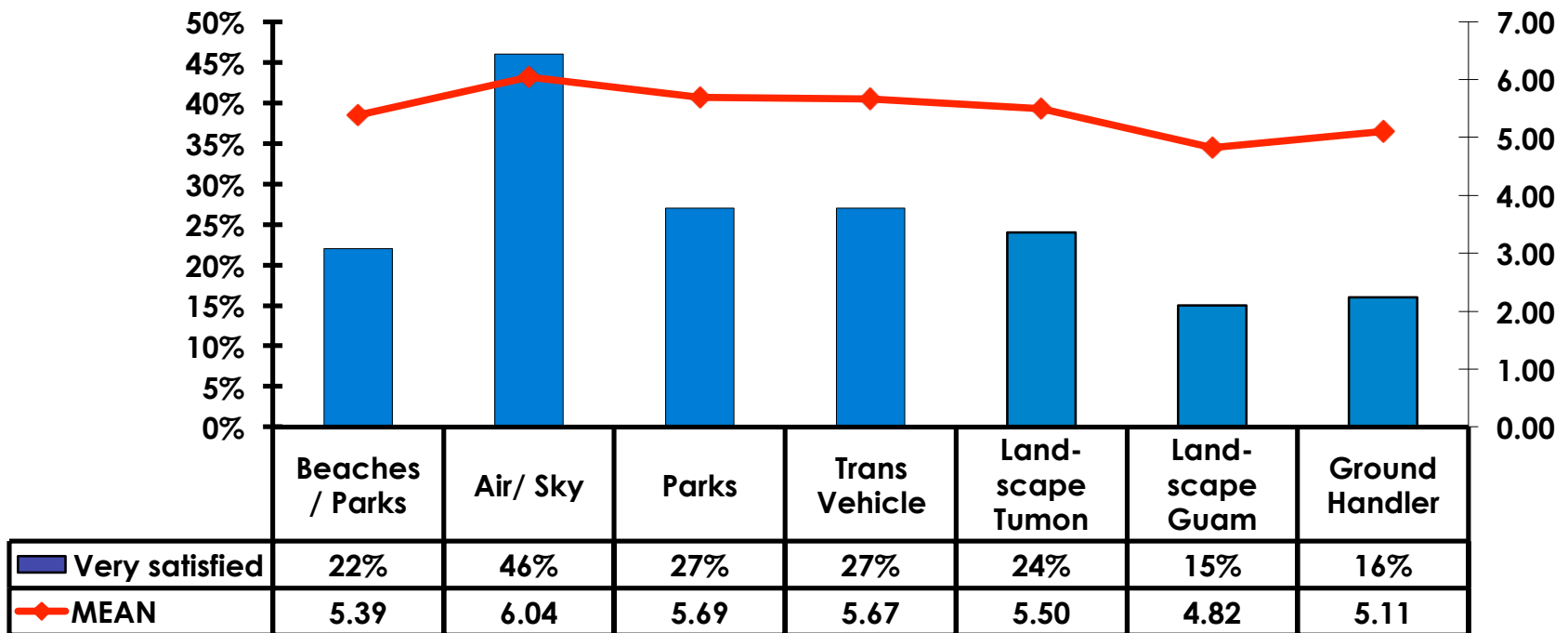
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

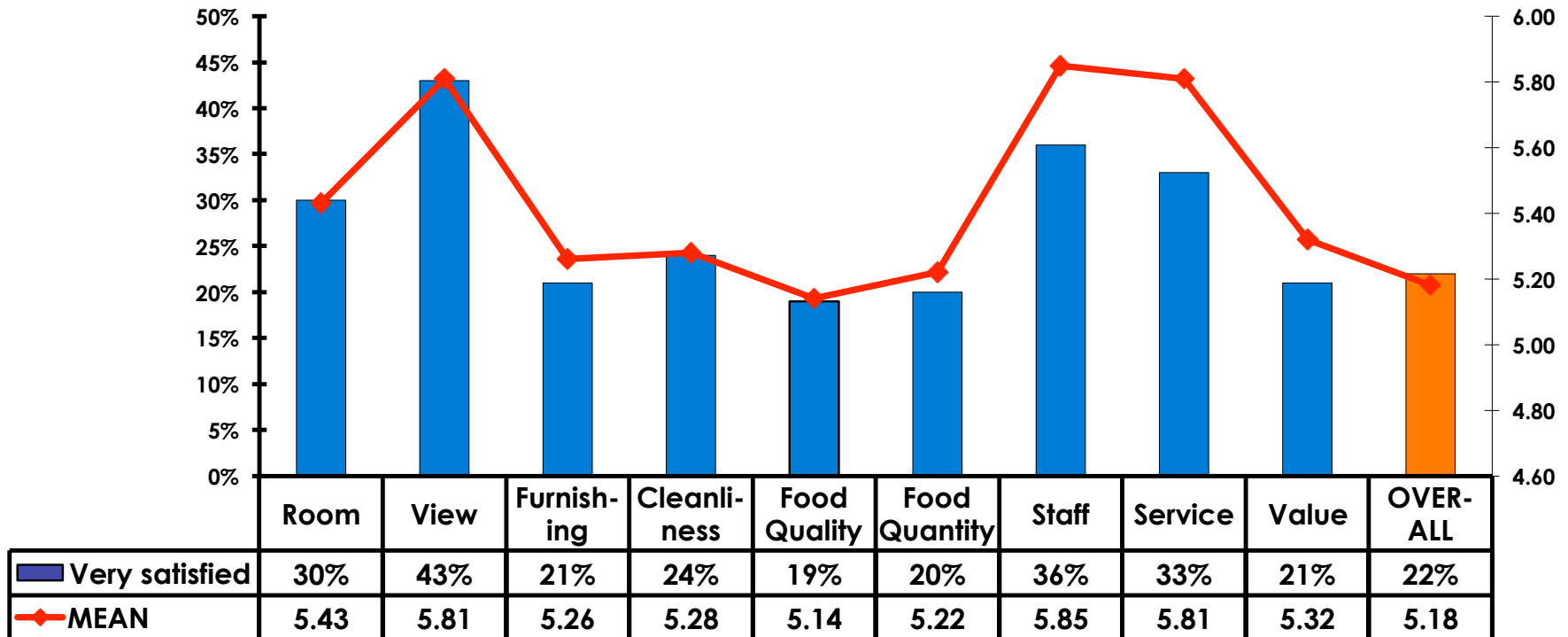
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

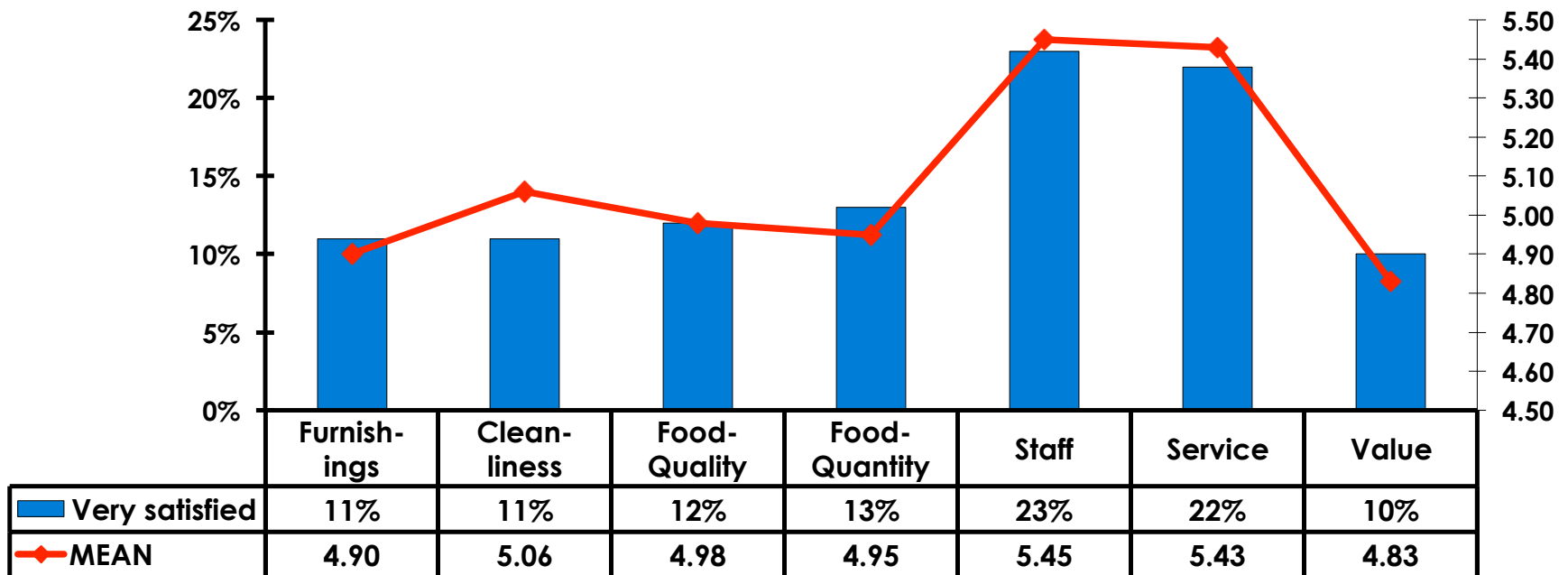
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

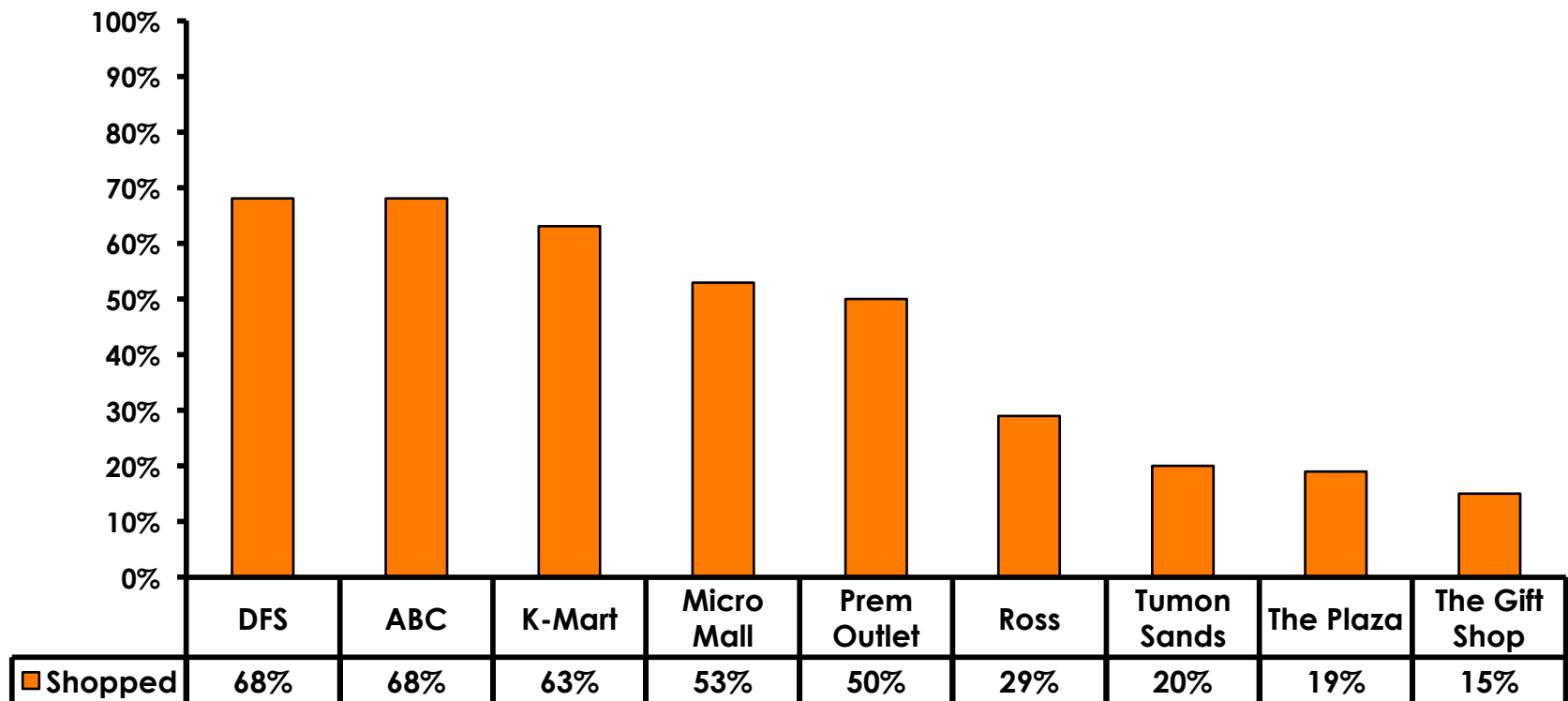
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

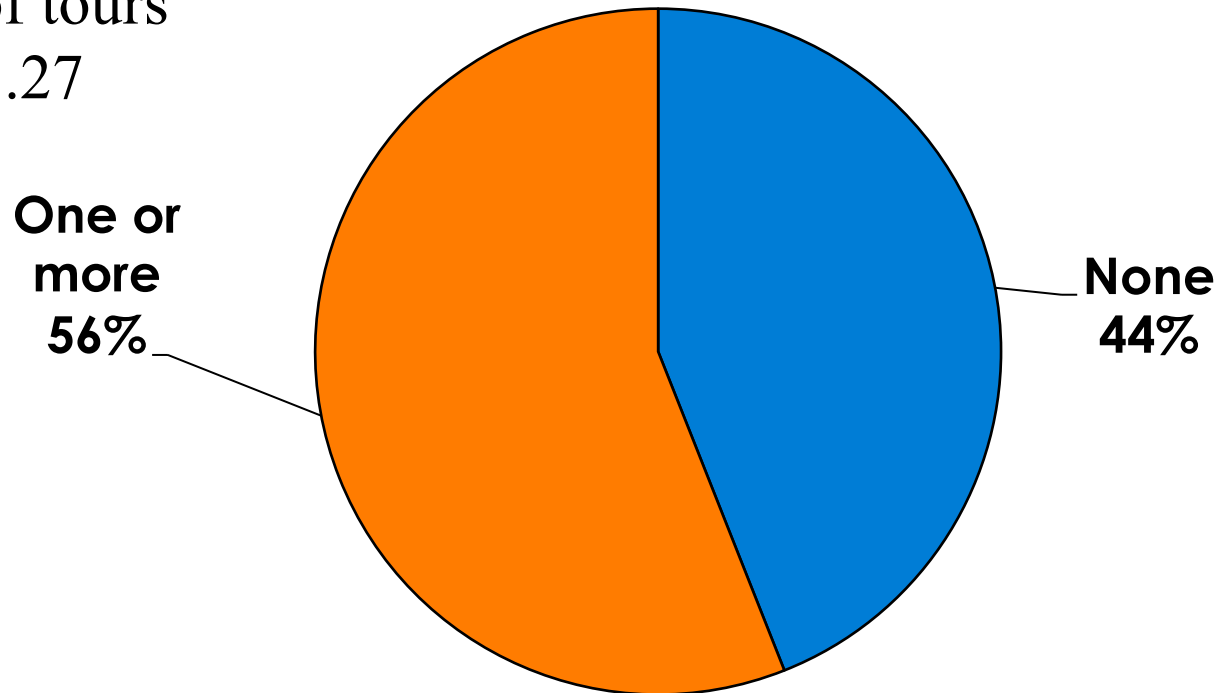
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 50%	Score of 6 to 7 = 46%
Score of 4 to 5 = 43%	Score of 4 to 5 = 45%
Score 1 to 3 = 7%	Score 1 to 3 = 9%
MEAN = 5.33	MEAN = 5.23

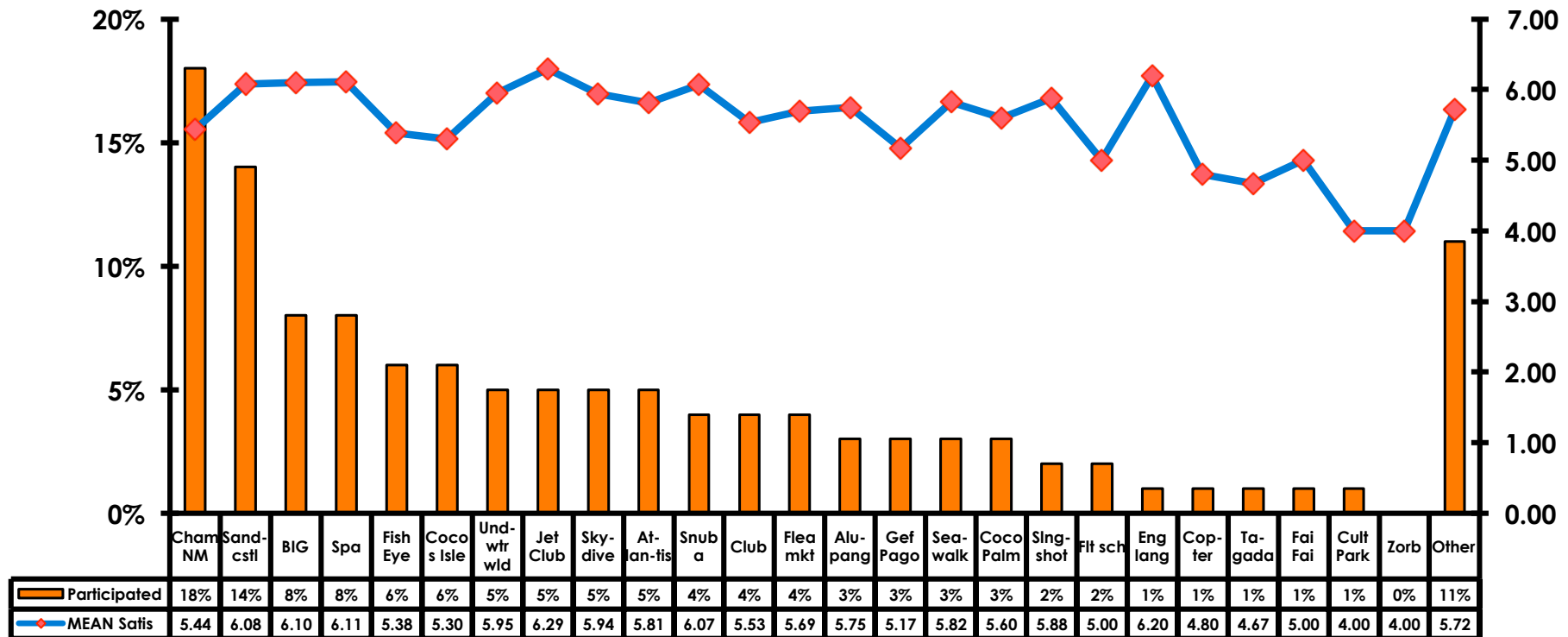
Optional Tour Participation

- Average number of tours participated in is 1.27



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 = 44%	Score of 6 to 7 = 37%
Score of 4 to 5 = 49%	Score of 4 to 5 = 54%
Score 1 to 3 = 7%	Score 1 to 3 = 9%
MEAN = 5.17	MEAN = 4.98

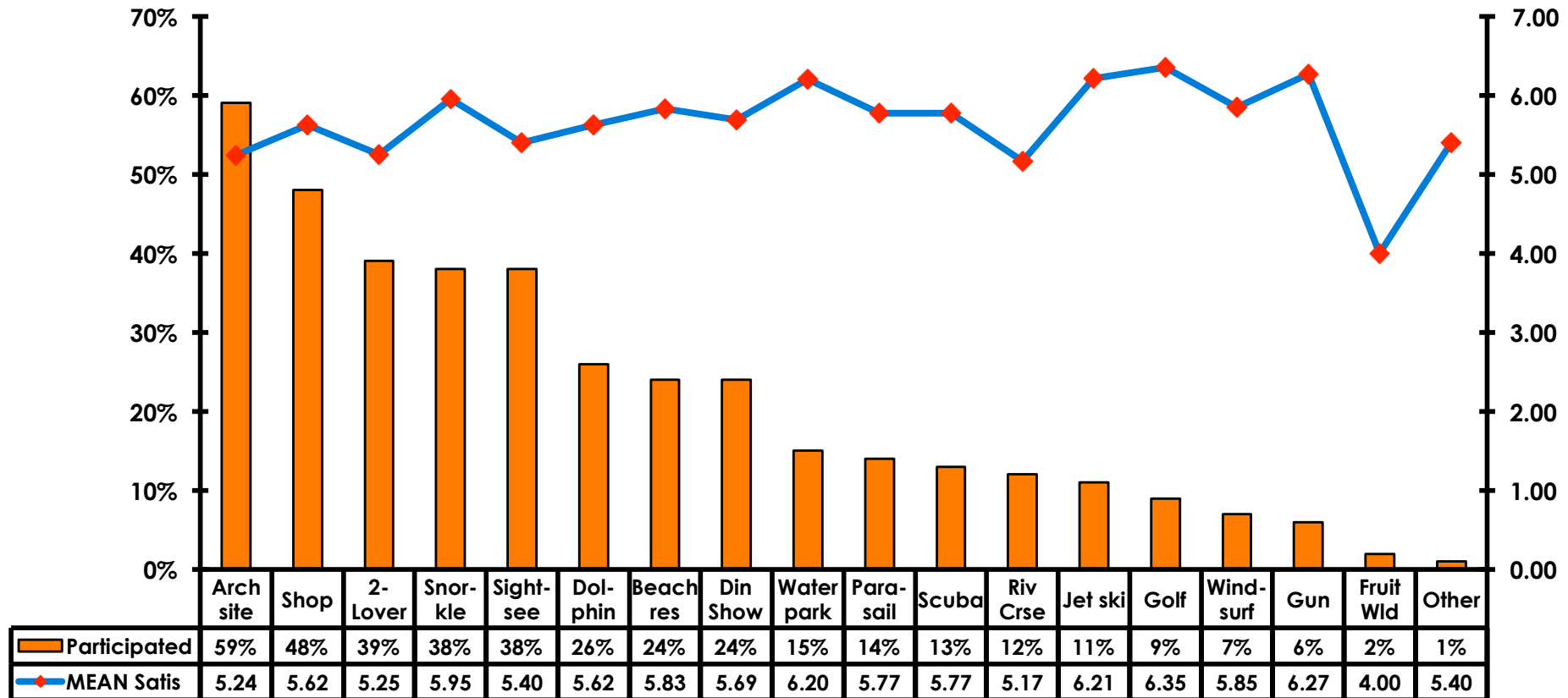
Night Tours Satisfaction

7pt Rating Scale

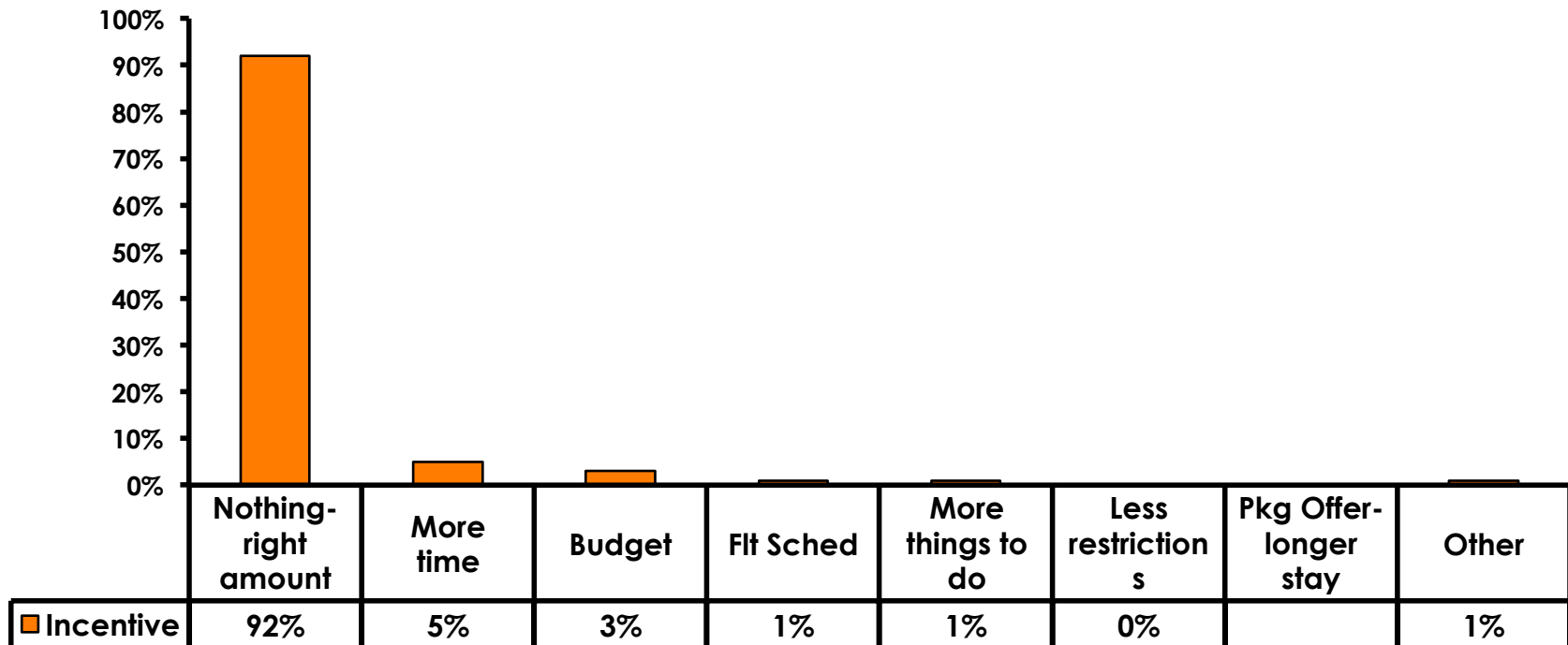
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 30%	Score of 6 to 7 = 30%
Score of 4 to 5 = 49%	Score of 4 to 5 = 51%
Score 1 to 3 = 20%	Score 1 to 3 = 19%
MEAN = 4.66	MEAN = 4.66

Satisfaction with Other Activities



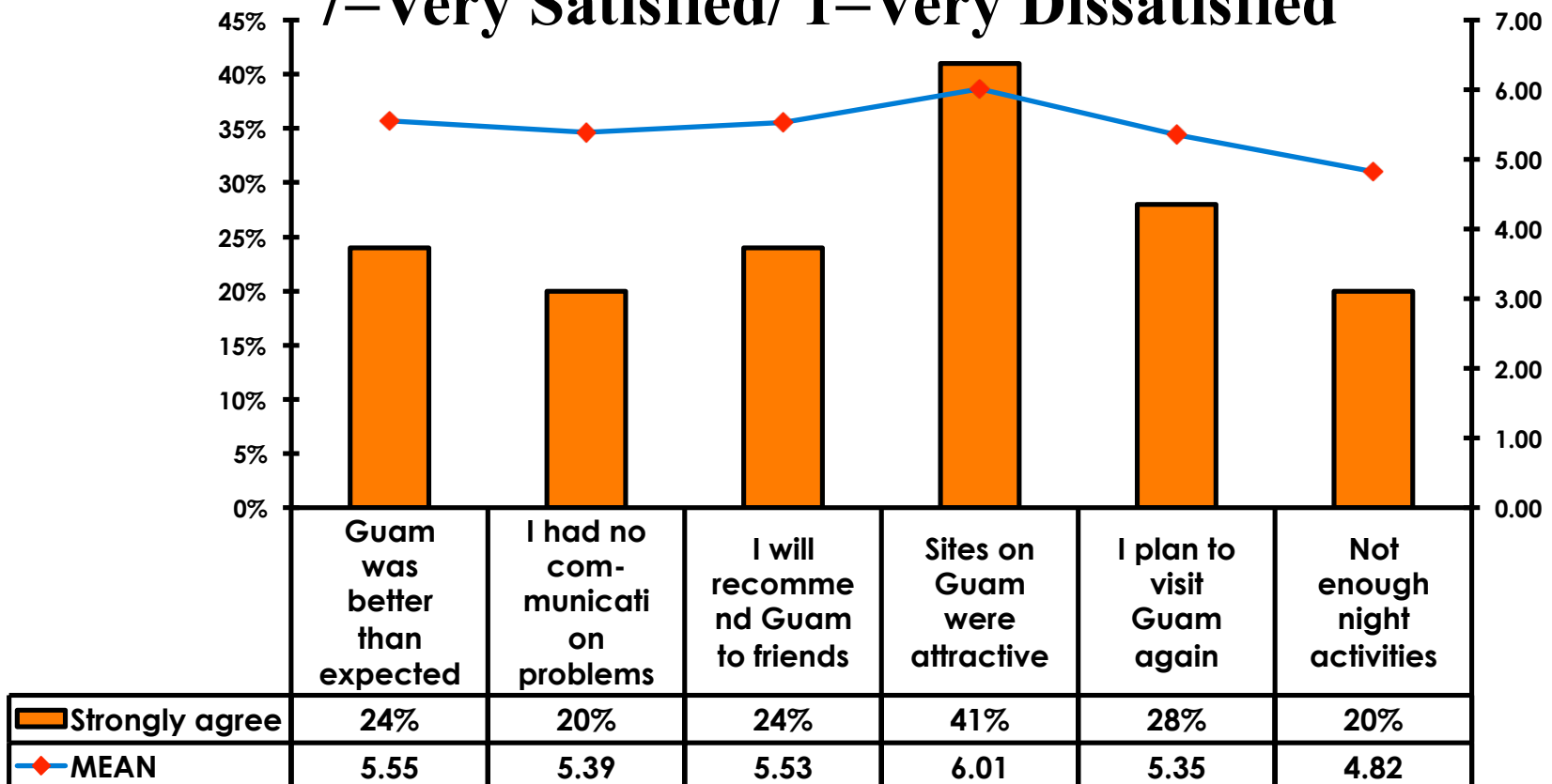
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

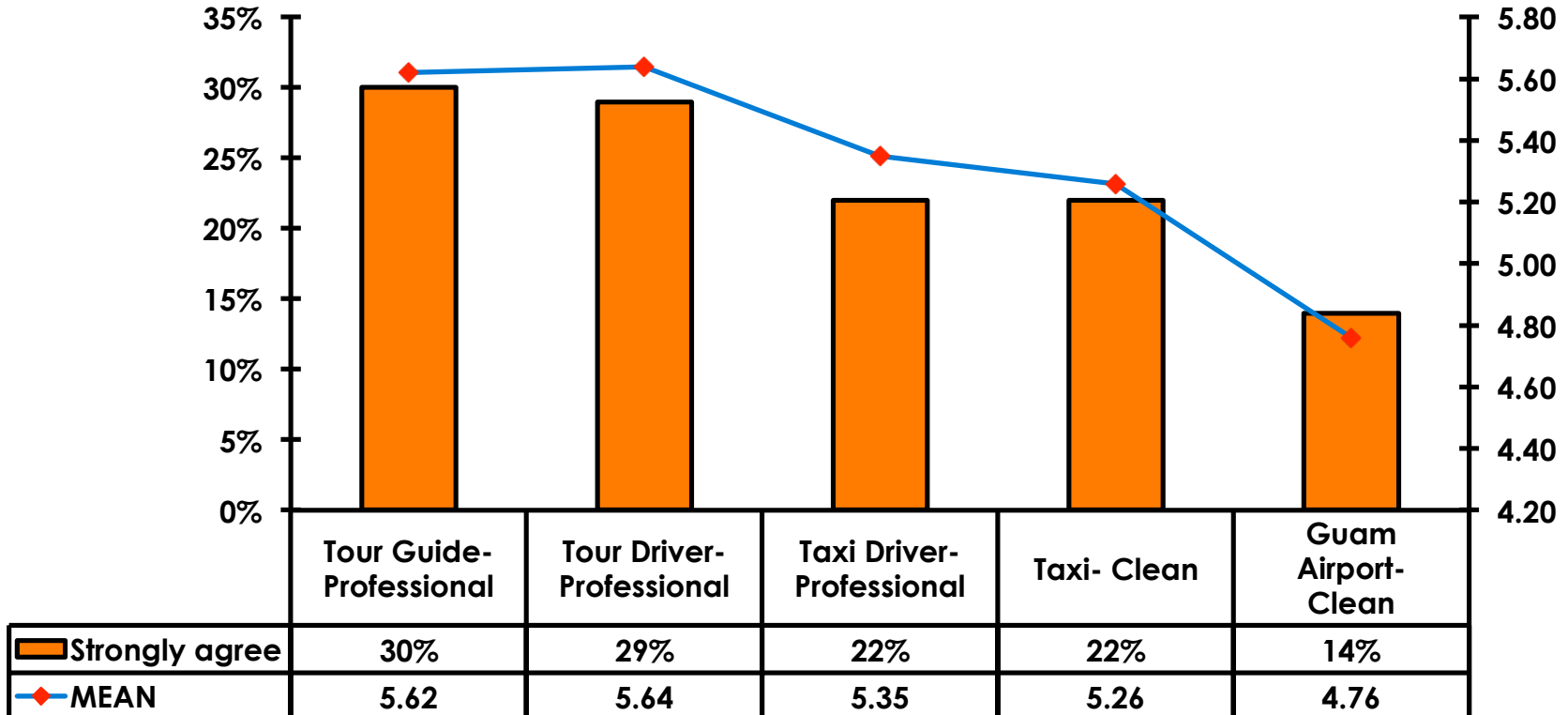
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

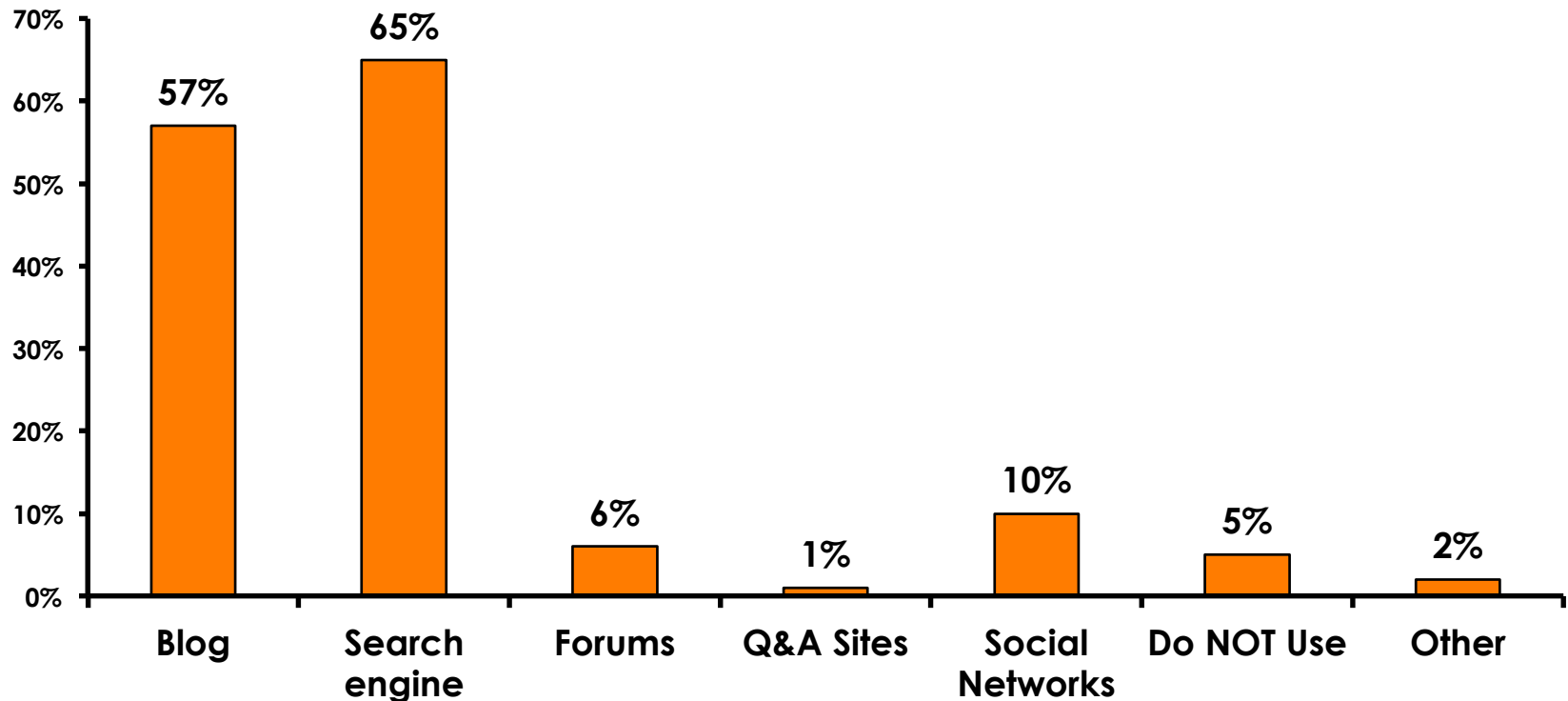
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



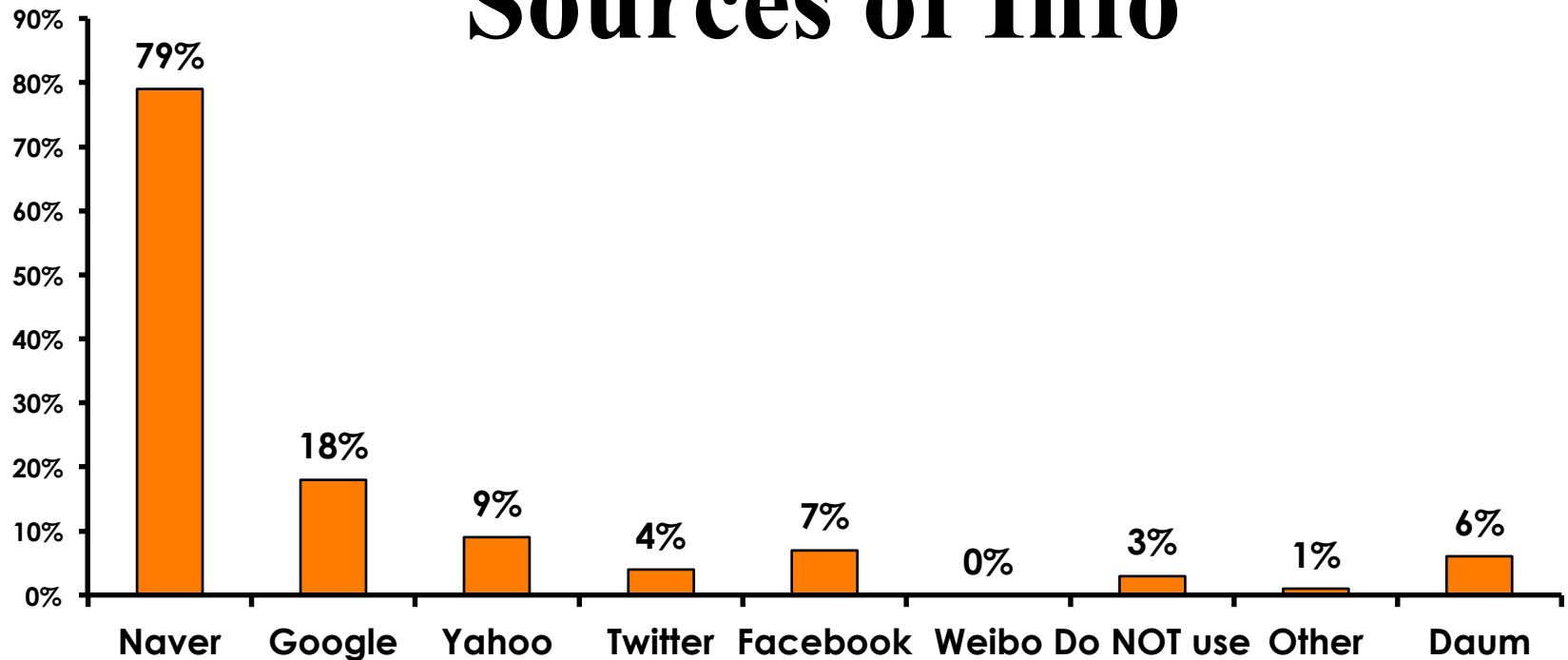
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

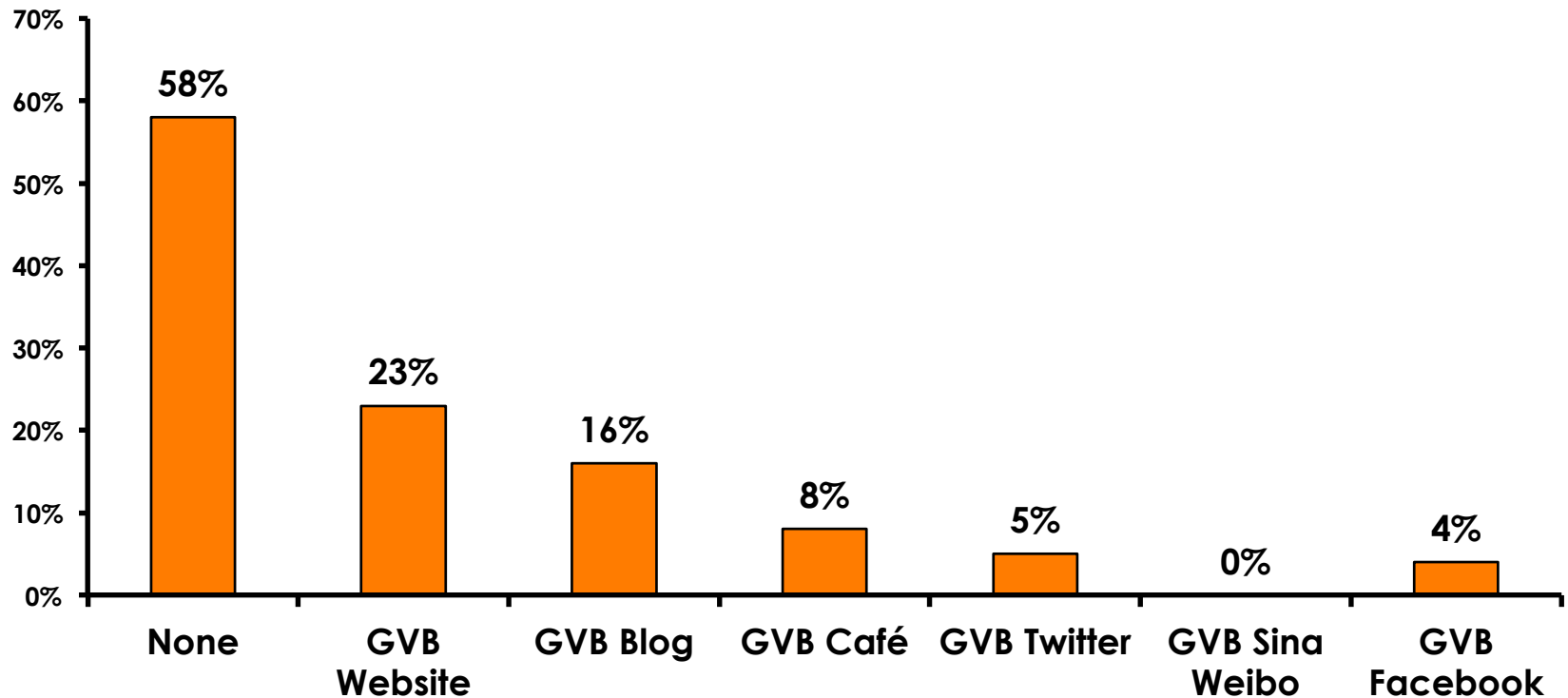


Internet- Things To Do

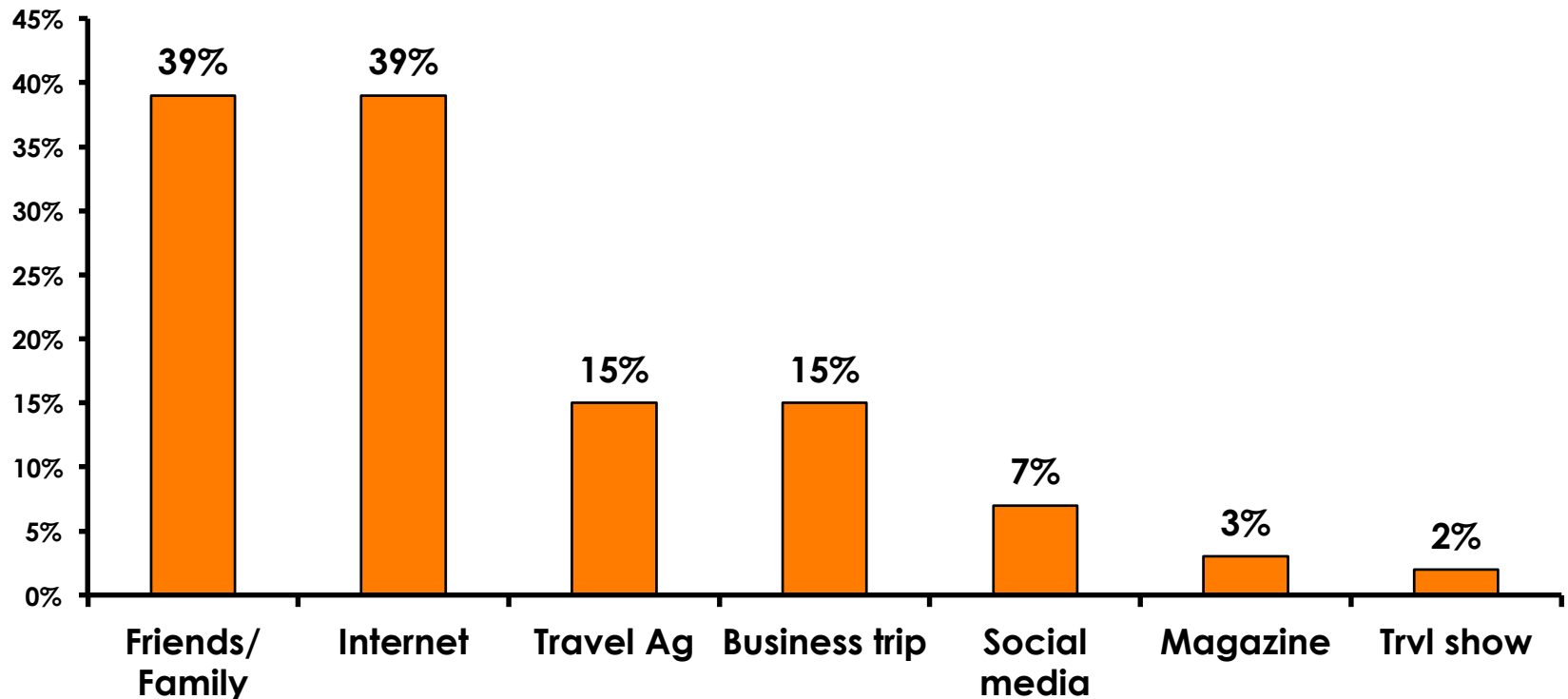
Sources of Info



Internet- GVB Sources

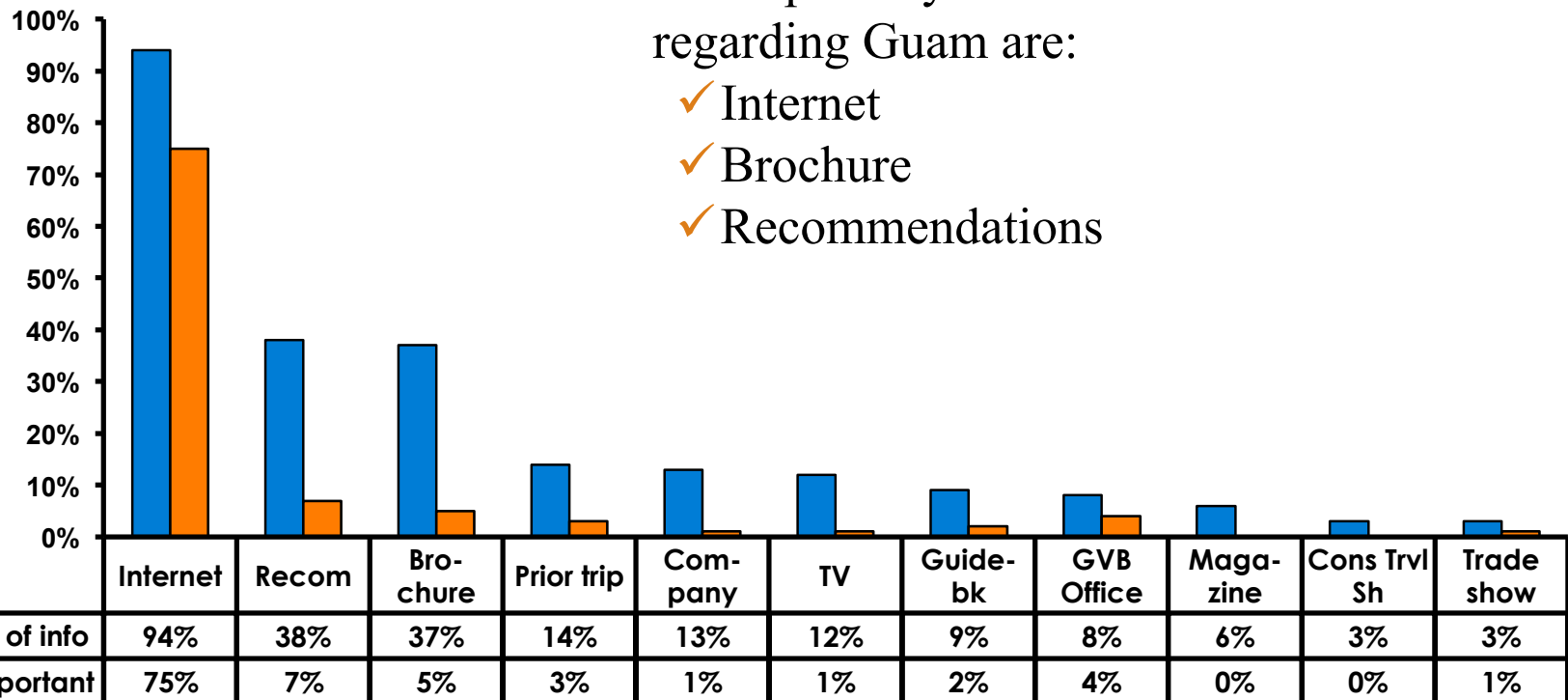


Travel Motivation- Info Sources



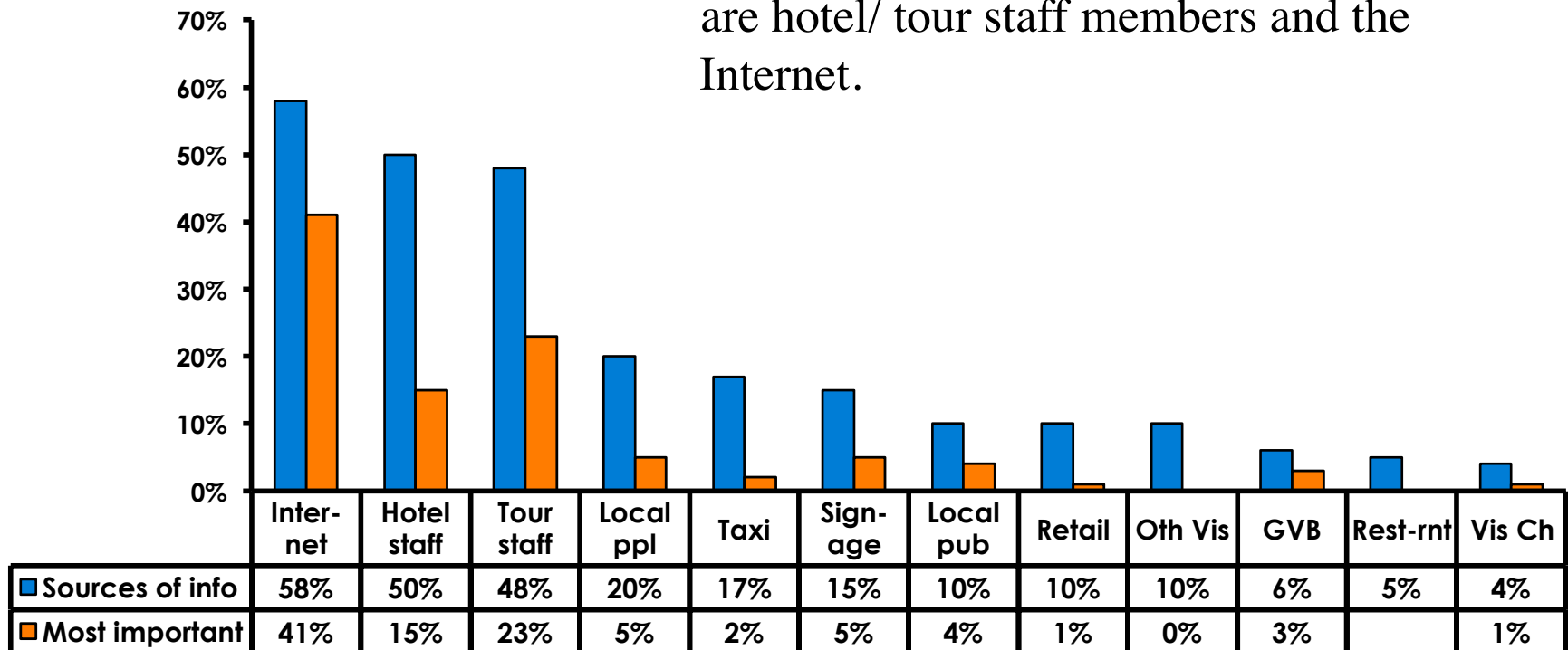
Sources of Information Pre-arrival

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



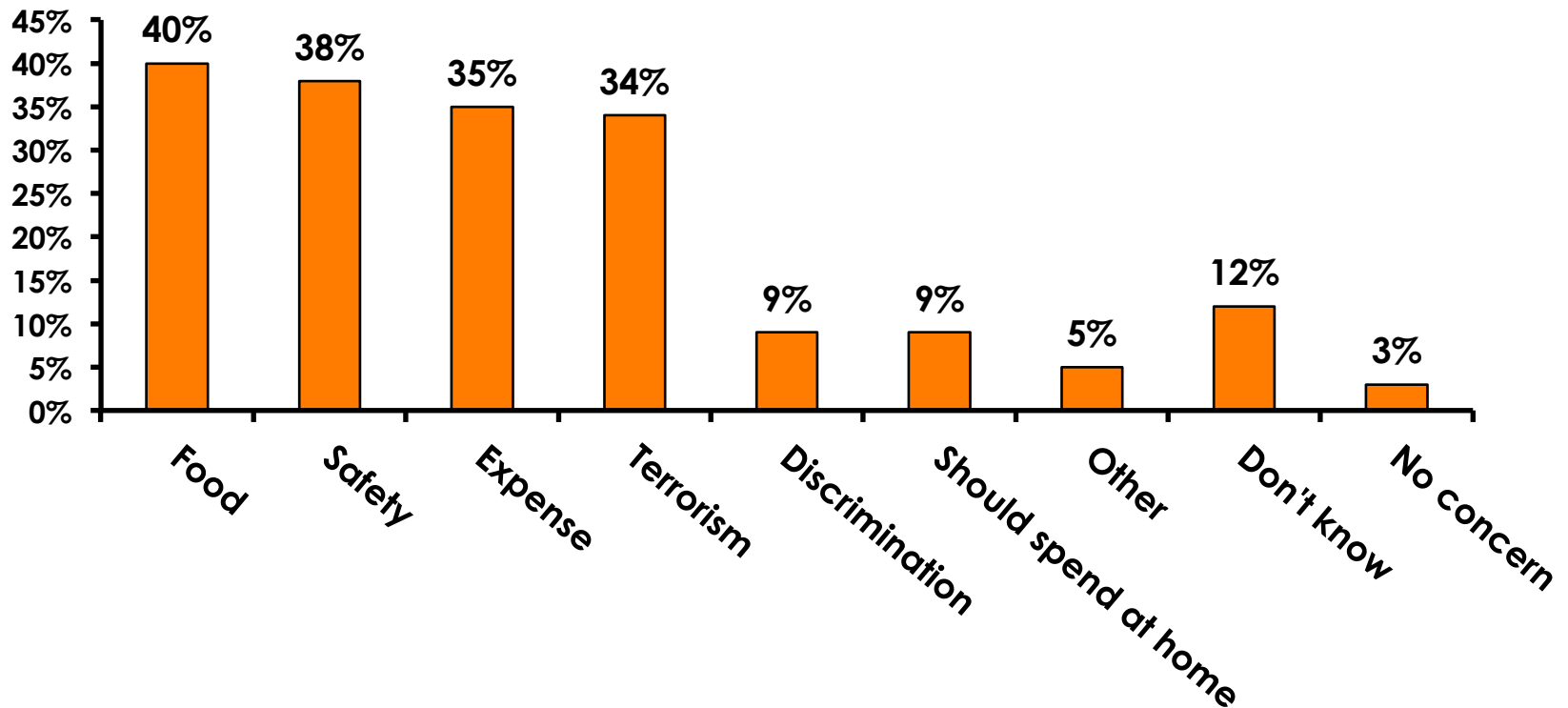
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

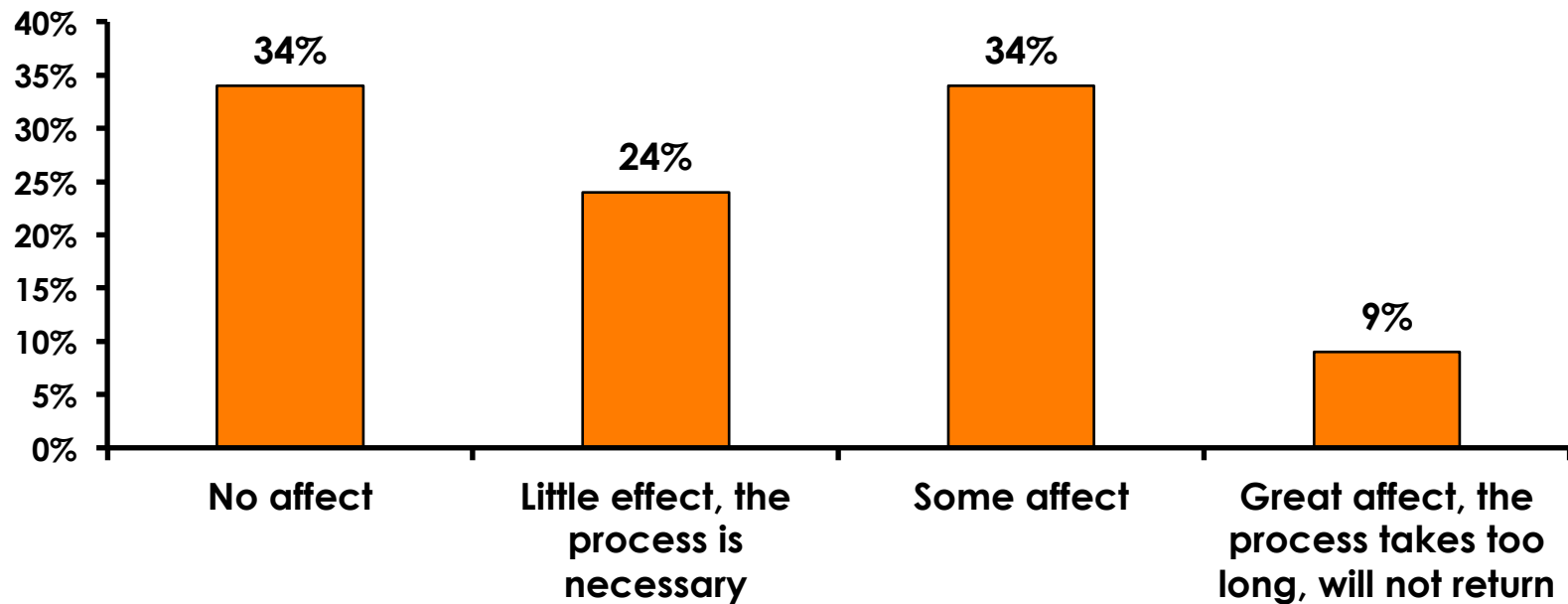
Concerns about travel outside of Korea - Overall



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	Food	40%	60%	39%	41%	27%	60%	45%	41%	38%	44%	38%	36%	50%
	Safety	38%	20%	36%	43%	27%	40%	30%	37%	37%	44%	41%	40%	28%
	Expense	35%	53%	36%	34%	13%	40%	40%	39%	32%	50%	22%	32%	28%
	Terrorism	34%	20%	37%	31%	20%	60%	20%	24%	42%	33%	31%	37%	39%
	Don't know	12%	13%	10%	14%	27%		10%	9%	10%	6%	9%	19%	11%
	Discrimination against Koreans	9%	7%	9%	11%		20%	5%	7%	14%	7%	13%	9%	
	Should spend at home	9%	20%	10%	6%	7%		15%	7%	7%	15%	9%	7%	11%
	Other	5%	20%	6%	2%	7%		10%	6%	6%	2%	6%	4%	11%
	No concerns	3%	7%	4%	2%	7%		5%	6%	3%	2%	6%	3%	6%
	Total	Count	349	15	193	122	15	5	20	54	71	54	32	75

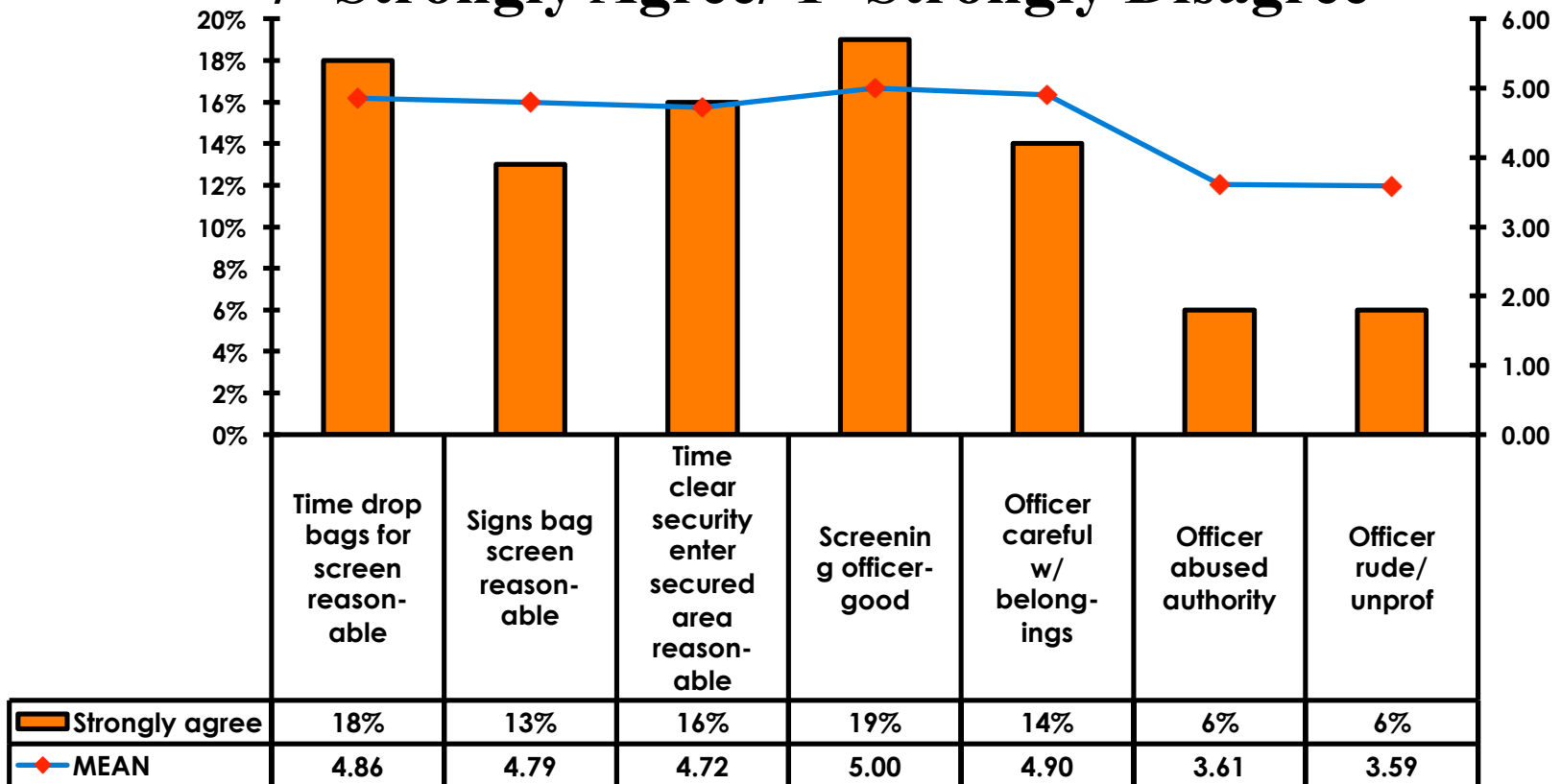
Security Screening/ Immigration Process at Guam International Airport



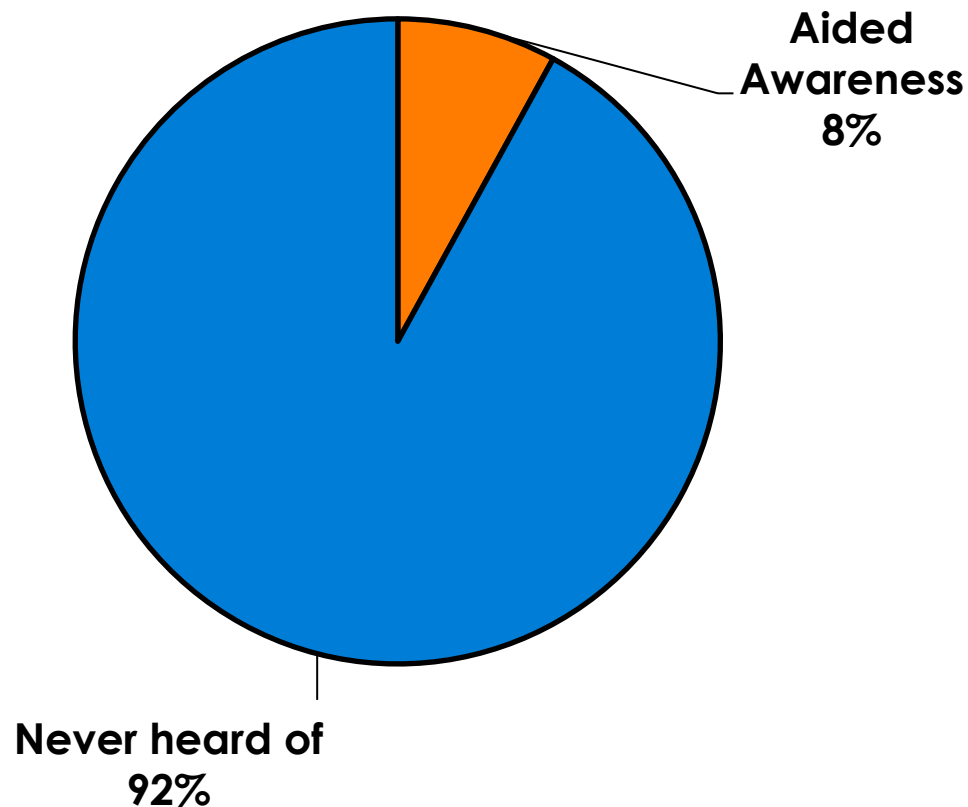
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=27

