

# GUAM VISITORS BUREAU Korean Visitor Tracker Exit Profile FY2014 JULY 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**

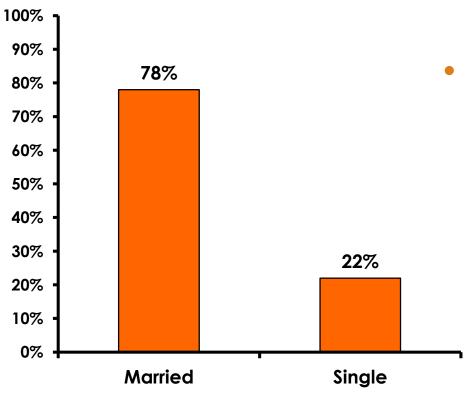
- To monitor the effectiveness of the Korean seasonal campaigns in attracting Korean visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Korea marketing plan.
- Identify significant determinants of visitor satisfaction,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



### SECTION 1 PROFILE OF RESPONDENTS



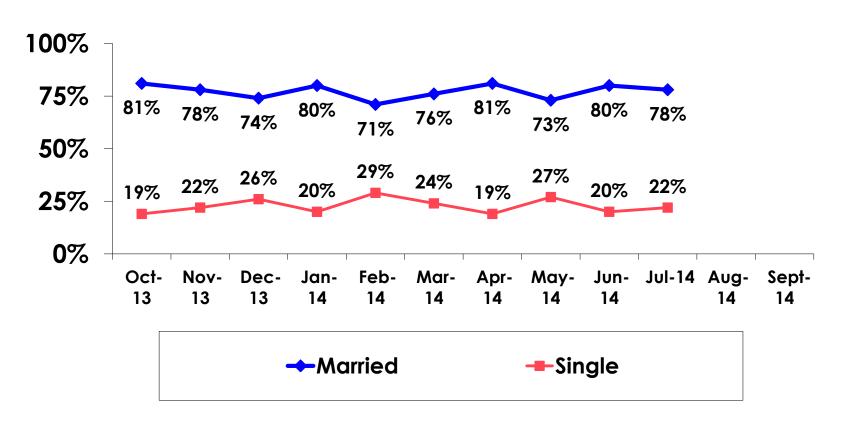
#### **Marital Status - Overall**



 Majority of Korean visitors are married.

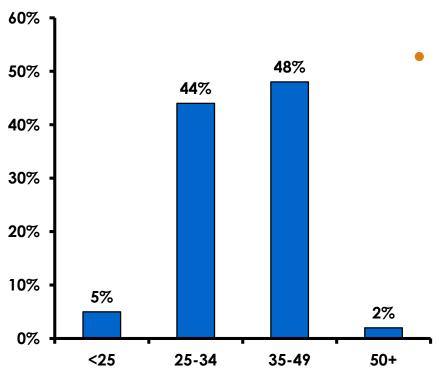


#### MARITAL STATUS





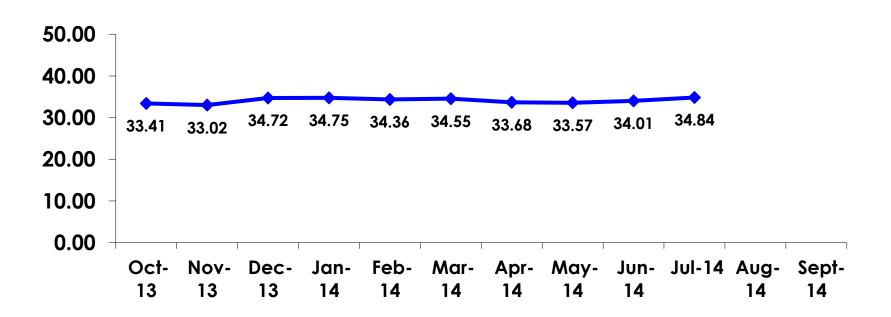
#### Age - Overall



The average age of the respondents is 34.84 years of age.

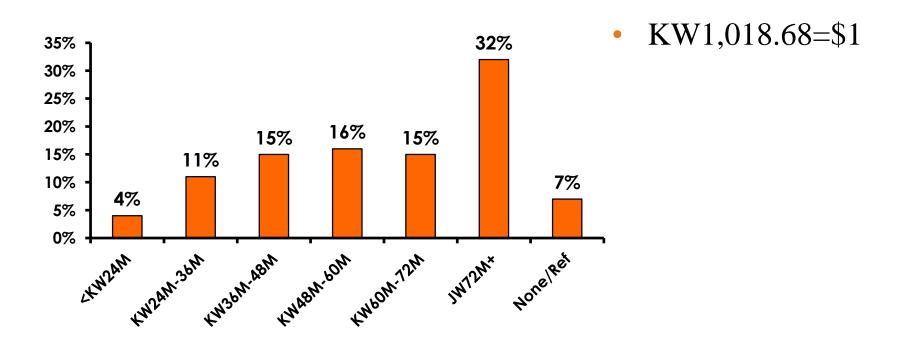


#### **AVERAGE - AGE**



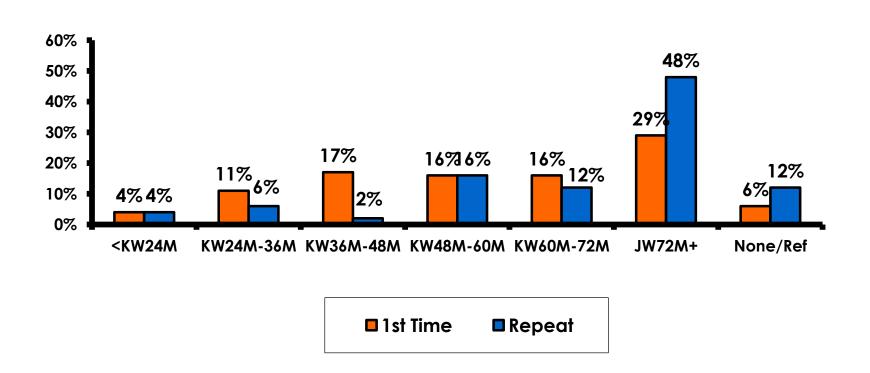


#### **Personal Income**





# Personal Income – 1st time vs. repeat



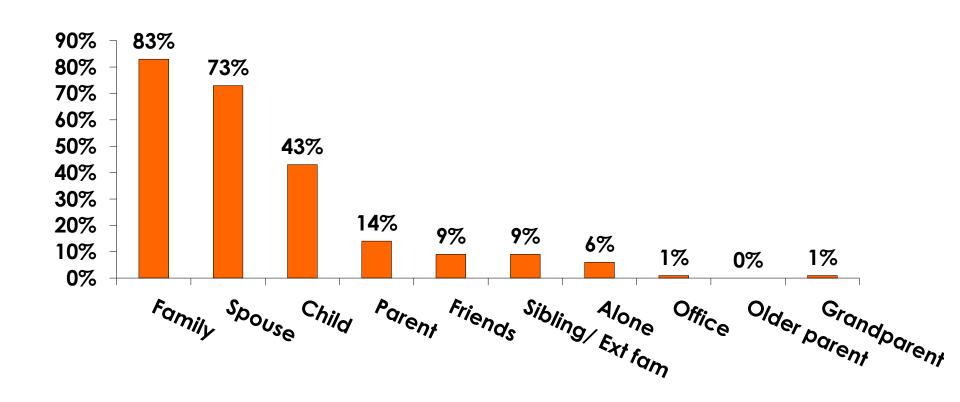


# Personal Income by Gender & Age

			TOTAL	GEN	DER		AG	E	
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<kw12.0m< td=""><td>Count</td><td>3</td><td>2</td><td>1</td><td></td><td>3</td><td></td><td></td></kw12.0m<>	Count	3	2	1		3		
		Column N %	1%	1%	1%		2%		
	KW12.0M-KW24.0M	Count	11	6	5	1	7	3	
		Column N %	3%	4%	3%	7%	5%	2%	
	KW24.0M-KW36.0M	Count	34	15	18	2	25	7	
		Column N %	11%	9%	11%	13%	18%	4%	
	KW36.0M-KW48.0M	Count	48	25	23	1	29	17	1
		Column N %	15%	15%	15%	7%	21%	11%	17%
	KW48.0M-KW60.0M	Count	52	25	27	1	26	24	1
		Column N %	16%	15%	17%	7%	18%	15%	17%
	KW60.0M-KW72.0M	Count	49	30	19	1	18	27	3
		Column N %	15%	18%	12%	7%	13%	17%	50%
	KW72.0M+	Count	102	59	43	1	25	74	1
		Column N %	32%	36%	27%	7%	18%	47%	17%
	No Income	Count	23	2	21	8	8	7	
		Column N %	7%	1%	13%	53%	6%	4%	
	Total	Count	322	164	157	15	141	159	6



#### **Travel Companions**

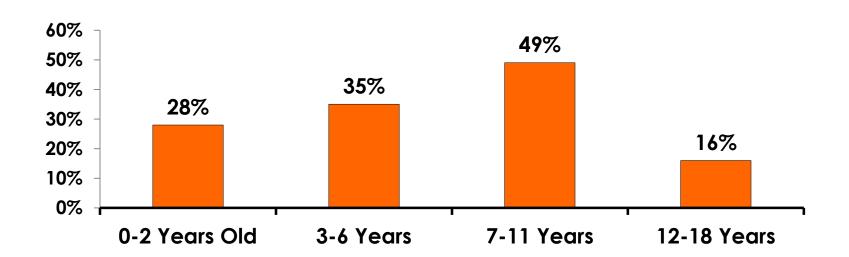




#### **Number of Children Travel Party**

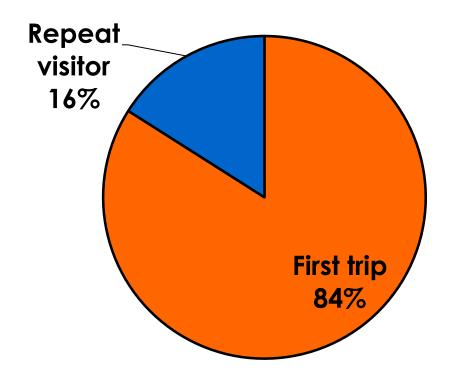
N=152total respondents traveling with children.

(Of those N=152 respondents, there is a total of 226 children 18 years or younger)



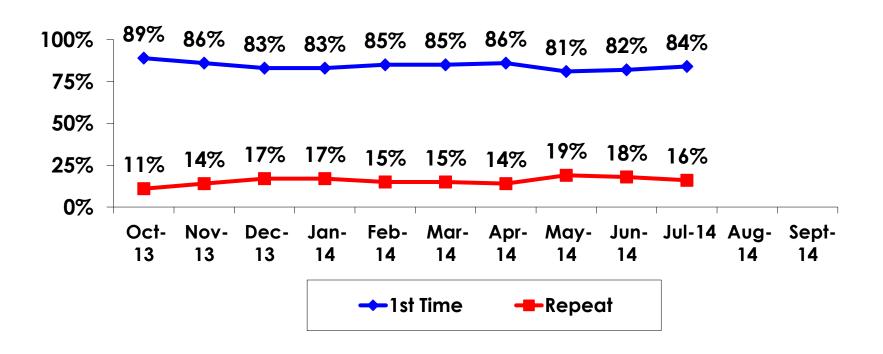


#### **Prior Trips to Guam**





#### PRIOR TRIPS TO GUAM





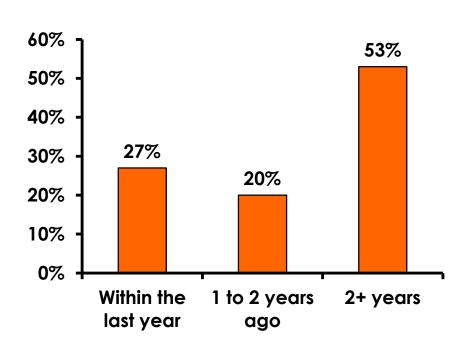
#### Trips to Guam by Age & Gender

				TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	175	155	20
		Column N %	50%	53%	35%
	Female	Count	174	137	37
		Column N %	50%	47%	65%
	Total	Count	349	292	57
AGE	18-24	Count	19	16	3
		Column N %	5%	6%	5%
	25-34	Count	154	135	19
		Column N %	44%	47%	33%
	35-49	Count	167	133	34
		Column N %	48%	46%	60%
	50+	Count	7	6	1
		Column N %	2%	2%	2%
	Total	Count	347	290	57



#### Repeat Visitors Last Trip

$$n = 55$$

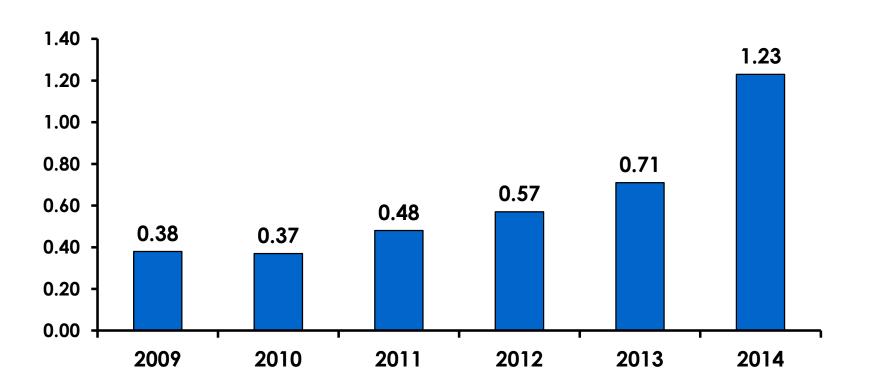


- The average repeat visitor has been to Guam 2.38 times.
- Half of repeat visitors have been here within the last year.



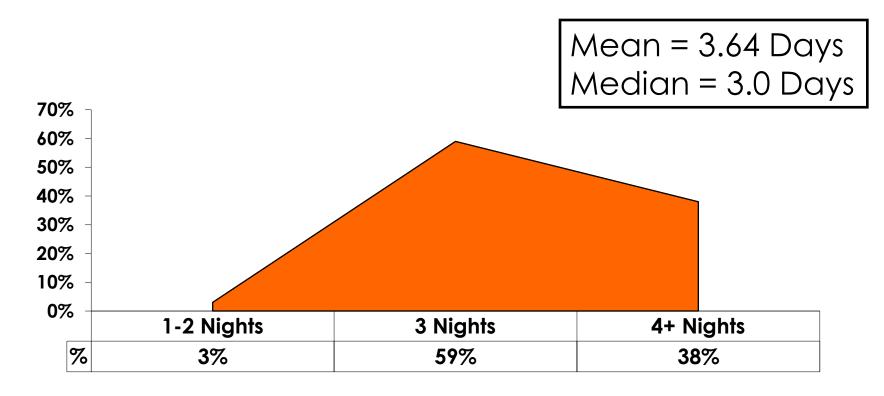
#### **Average Number Overnight Trips**

(2009-2014) (2 nights or more)



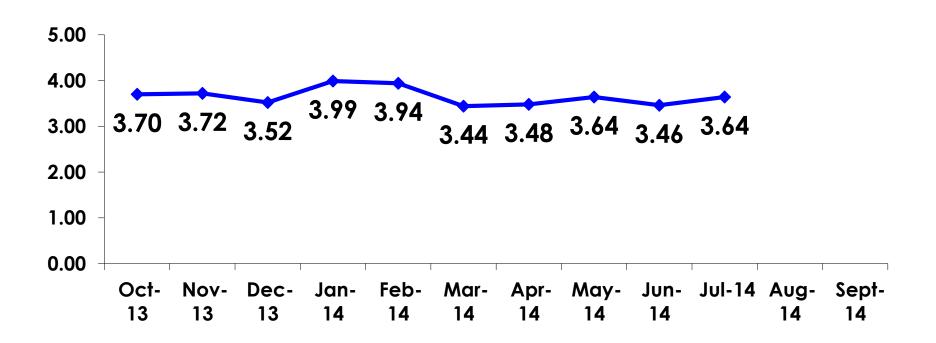


#### Length of Stay





#### **AVG LENGTH OF STAY**





#### Occupation by Income

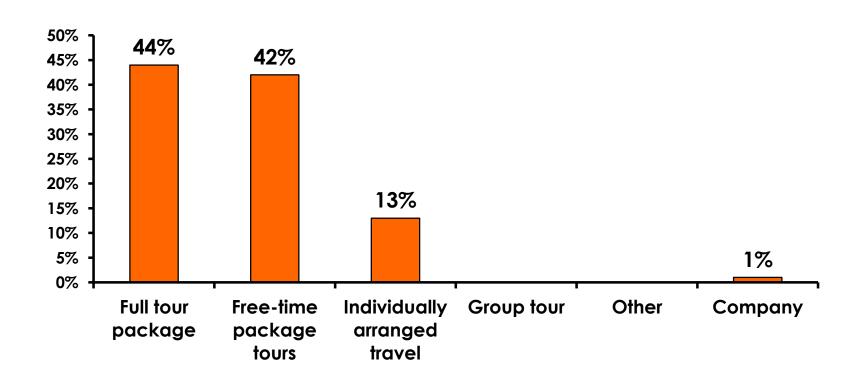
			TOTAL		Q26						
			-	<kw12.0m< th=""><th>KW12.0M- KW24.0M</th><th>KW24.0M- KW36.0M</th><th>KW36.0M- KW48.0M</th><th>KW48.0M- KW60.0M</th><th>KW60.0M- KW72.0M</th><th>KW72.0M+</th><th>No Income</th></kw12.0m<>	KW12.0M- KW24.0M	KW24.0M- KW36.0M	KW36.0M- KW48.0M	KW48.0M- KW60.0M	KW60.0M- KW72.0M	KW72.0M+	No Income
Q25	White Collar Office Worker		34%		36%	62%	21%	46%	33%	34%	5%
	Housewife/ Homemaker		15%		18%	3%	21%	12%	6%	14%	50%
	Self-employed		12%	33%	9%	9%	15%	12%	6%	18%	
	Professional/ Specialist/ Tech		10%	33%	9%	6%	13%	12%	6%	13%	
	Student		6%	33%	18%	3%		2%	4%	3%	36%
	Professor/ Teacher/ After- school		6%			6%	2%	6%	10%	8%	
	Service worker/ Private hse worker		4%			3%	13%	2%	6%		
	Manager/ Admin		3%					2%	4%	6%	
	Freelancer		2%		9%	3%		2%	6%	1%	
	Sales worker/ Clerical		2%				8%	2%	2%		
	Unemployed		2%			3%		2%		1%	9%
	Other		1%				4%		4%	1%	
	Govt- Manager		1%				2%	2%	4%		
	Judicial		1%						2%	2%	
	Farmer/ Forestry/ Fisherman		1%						4%		
	Retired		0%				2%				
	Skilled worker		0%			3%					
	Govt- office worker non- mgr		0%						2%		
	Total	Count	339	3	11	34	48	52	49	102	22



## SECTION 2 TRAVEL PLANNING



#### **Travel Planning - Overall**





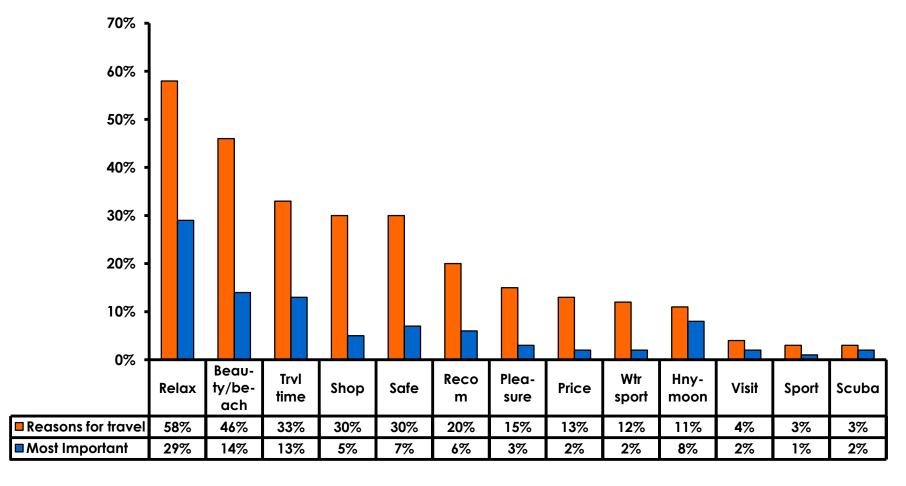
#### **Accommodation by Income**

Average length of stay: 3.64 days

			TOTAL				Q26				
			-	<kw12.0m< th=""><th>KW12.0M- KW24.0M</th><th>KW24.0M- KW36.0M</th><th>KW36.0M- KW48.0M</th><th>KW48.0M- KW60.0M</th><th>KW60.0M- KW72.0M</th><th>KW72.0M+</th><th>No Income</th></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		41%	67%	36%	15%	35%	40%	37%	60%	26%
	Hyatt Regency Guam		13%	33%	18%	21%	19%	10%	8%	12%	9%
	Sheraton Laguna Guam		8%		9%	15%	10%	8%	16%	1%	9%
	Hotel Nikko Guam		7%			18%	8%	2%	4%	5%	9%
	Hilton Guam Resort		6%		9%	6%	6%	6%	6%	3%	22%
	Westin Resort Guam		4%			3%	10%	2%	6%	2%	
	Holiday Resort Guam		4%			12%		6%	2%	2%	4%
	Onward Beach Resort		3%			3%		6%	2%	5%	
	Outrigger Guam Resort		3%		9%		4%	4%	2%	3%	
	Guam Reef & Olive Spa		2%			6%	2%	6%	4%		
	Other		2%				2%	2%	2%	3%	
	Home stay/ friend/ relative		2%		9%				4%	1%	4%
	Leo Palace Resort		1%					4%			4%
	Fiesta Resort Guam		1%		9%	3%	2%				
	Tumon Bay Capital Hotel		1%						2%	1%	4%
	Condo		1%							2%	4%
	Oceanview Hotel		1%						2%		
	Guam Marriott Resort		1%							1%	4%
	Hotel Santa Fe		0%								
ı	Apartment		0%					2%			
ı	Royal Orchid Guam		0%					2%			
	Pacific Bay Hotel		0%					2%			
ı	Bayview Hotel		0%						2%		
	Total	Count	349	3	11	34	48	52	49	102	23



#### **Travel Motivation - Top Responses**





# **Most Important Reason for Choosing Guam**

- Relaxation,
- Guam's natural beauty/ beaches and
- Short travel time are the primary reasons for visiting during this period.



#### Motivation by Age & Gender

			TOTAL		AG	ÈΕ		GENDER		
			-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Relax		58%	53%	55%	62%	33%	57%	60%	
	Natural beauty		46%	47%	40%	52%	17%	45%	47%	
	Short travel time		33%	11%	36%	32%	17%	35%	31%	
	Shopping		30%	53%	30%	29%		27%	33%	
	Safe		30%	11%	29%	32%	33%	28%	32%	
	Recomm- friend/family/trvl agnt		20%	11%	15%	24%	50%	19%	21%	
	Pleasure		15%	16%	12%	17%	17%	12%	17%	
	Price		13%	16%	16%	11%	17%	14%	12%	
	Water sports		12%	11%	12%	13%	17%	14%	10%	
	Previous trip		12%	5%	8%	17%	17%	9%	16%	
	Honeymoon		11%	11%	17%	5%		11%	10%	
	Visit friends/ Relatives		4%	11%	4%	2%	33%	2%	6%	
	Other		3%	5%	3%	4%	17%	3%	4%	
	Organized sports		3%		4%	4%		2%	5%	
	Scuba		3%	5%	5%	2%	17%	5%	2%	
	Golf		3%		3%	4%		3%	2%	
	Company Sponsored		1%	5%	1%	1%		2%	1%	
	Company/ Business Trip		1%		1%	2%		2%	1%	
	Married/ Attn wedding		1%	11%	1%			1%	1%	
	Career Cert/ Testing		1%		1%	1%		1%	1%	
	Convention/ Trade/ Conference		0%				17%		1%	
	Total	Count	349	19	154	167	6	175	173	



#### **Motivation by Income**

		TOTAL				Q26				
		-	<kw12.0m< td=""><td>KW12.0M- KW24.0M</td><td>KW24.0M- KW36.0M</td><td>KW36.0M- KW48.0M</td><td>KW48.0M- KW60.0M</td><td>KW60.0M- KW72.0M</td><td>KW72.0M+</td><td>No Income</td></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%	33%	9%	68%	67%	65%	57%	60%	48%
	Natural beauty	46%	33%	45%	50%	48%	46%	47%	45%	52%
	Short travel time	33%		9%	9%	33%	31%	47%	46%	17%
	Shopping	30%	33%		26%	33%	33%	33%	27%	48%
	Safe	30%	33%	9%	21%	23%	33%	41%	36%	9%
	Recomm- friend/family/trvl agnt	20%	67%	9%	9%	15%	27%	33%	19%	9%
	Pleasure	15%		18%	15%	13%	15%	22%	10%	22%
	Price	13%		9%	15%	8%	25%	16%	10%	13%
	Water sports	12%		9%	21%	10%	8%	16%	14%	9%
	Previous trip	12%		9%	3%	2%	13%	10%	21%	17%
	Honeymoon	11%		27%	35%	19%	8%	6%	2%	13%
	Visit friends/ Relatives	4%		9%			6%	8%	3%	4%
	Other	3%	33%	18%		2%	2%	2%	6%	
	Organized sports	3%			3%	2%	6%		6%	4%
	Scuba	3%			3%		2%	6%	3%	4%
	Golf	3%			3%		2%		6%	
	Company Sponsored	1%					2%	4%		
	Company/ Business Trip	1%		9%				4%	1%	
	Married/ Attn wedding	1%			3%					4%
	Career Cert/ Testing	1%					4%			
	Convention/ Trade/ Conference	0%						2%		
	Total Coun	349	3	11	34	48	52	49	102	23



### SECTION 3 EXPENDITURES



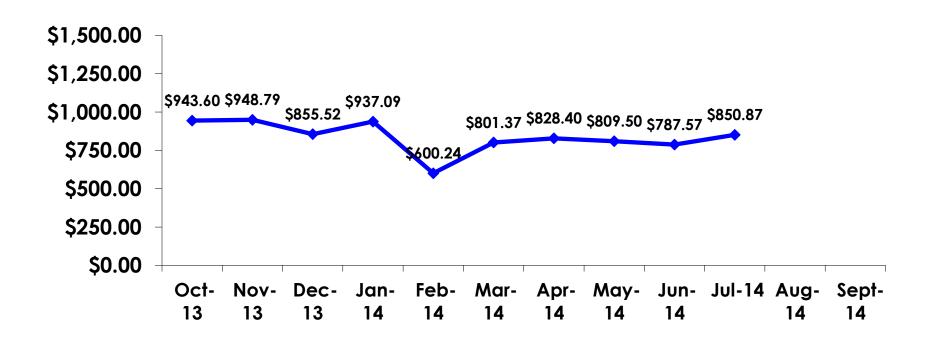
#### Prepaid Expenditures

KW 1,018.68/US\$1

- \$2,303.53 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,707 = maximum (highest amount recorded for the entire sample)
- \$850.87 = overall mean average <u>per person</u> prepaid expenditures



### PREPAID EXPENDITURES Per Person





#### Breakdown of Prepaid Expenditures KW 1,018.68=\$1

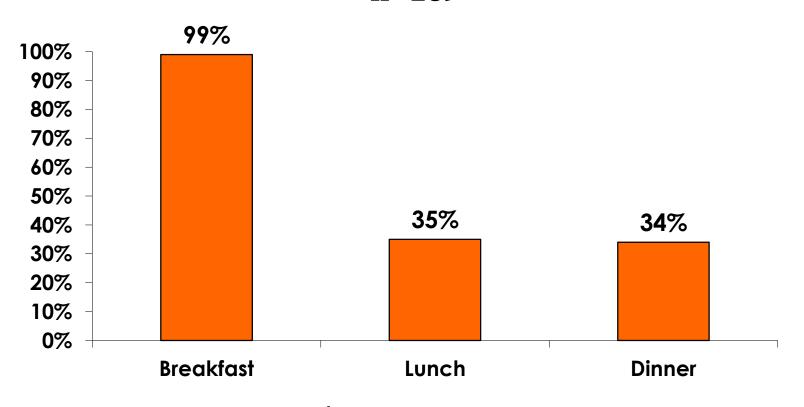
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$2,455.76
Air & Accommodation w/ daily meal package	\$3,124.20
Air only	\$1,114.38
Accommodation only	\$799.18
Accommodation w/ daily meal only	\$932.58
Food & Beverages in Hotel	\$-
Ground transportation – Korea	\$76.03
Ground transportation – Guam	\$110.79
Optional tours/ activities	\$177.85
Other expenses	\$623.61
Total Prepaid	\$2,303.53



#### PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=189

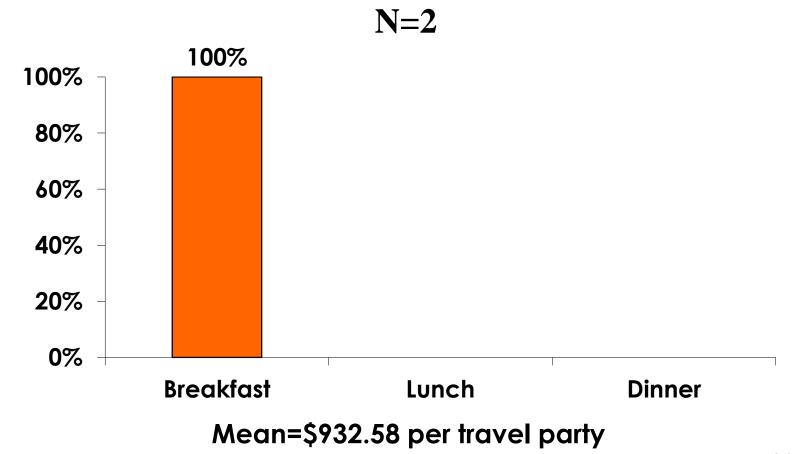


Mean=\$3,124.20 per travel party



#### PREPAID MEAL BREAKDOWN

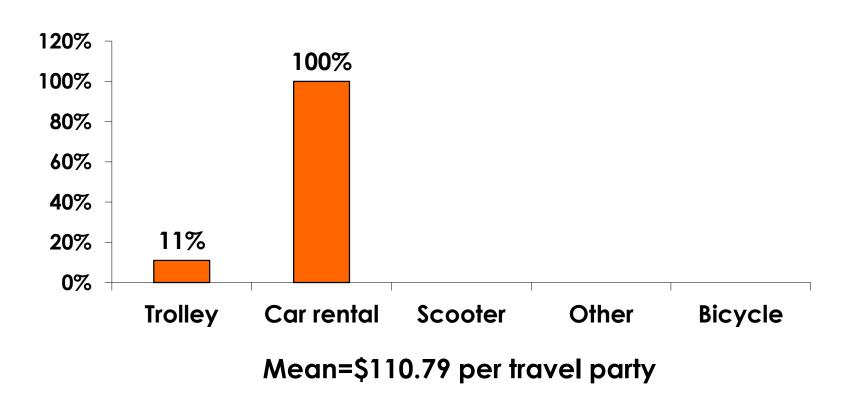
Accommodations with Daily Meal Pkg.





#### PREPAID GROUND TRANSPORTATION

n=9



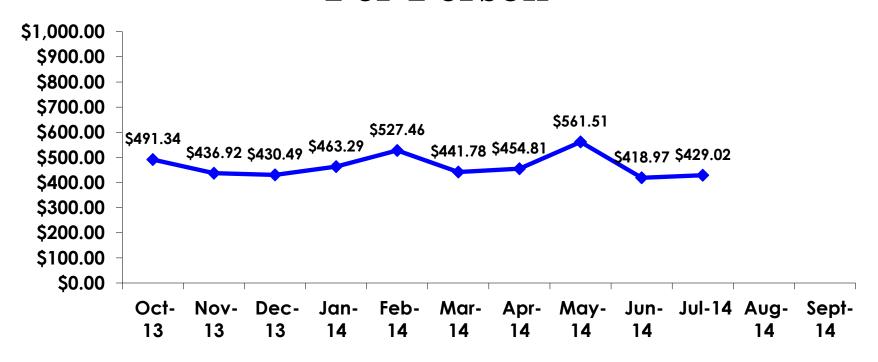


#### **On-Island Expenditures**

- \$985.72 = 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)
- \$429.02 = overall mean average <u>per person</u> onisland expenditure



### ON-ISLAND EXPENDITURES Per Person

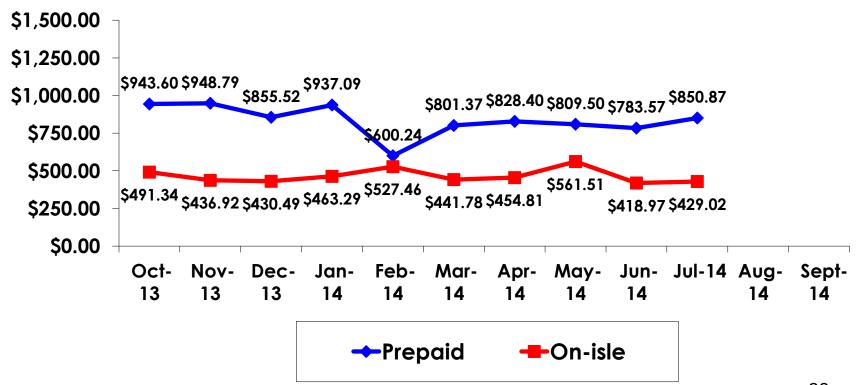


$$YTD = $465.54$$



## PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$835.82 On-Isle YTD = \$465.54





# Total On-Island Expenditure by Gender & Age

	TOTAL GENDER					GENDER								
						Ma	ile		Female					
					AGE				AGE					
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+		
PER PERSON	Mean	\$429.02	\$451.12	\$396.89	\$93.75	\$542.73	\$386.80	\$637.50	\$521.00	\$469.12	\$298.10	\$321.67		
	Median	\$267	\$325	\$250	\$94	\$381	\$258	\$525	\$175	\$384	\$165	\$165		
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
	Maximum	\$4,000	\$2,500	\$4,000	\$188	\$2,500	\$2,000	\$1,500	\$4,000	\$2,000	\$1,500	\$800		



## On-Island Expenditure Categories by Gender & Age

		TOTAL	GENE	ER		AG	E	
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$42.84	\$50.21	\$35.67	\$5.26	\$37.15	\$54.92	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.11	\$33.63	\$30.76	\$13.16	\$27.88	\$39.92	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$80.84	\$91.35	\$70.74	\$98.00	\$95.20	\$68.87	\$35.71
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPT TOUR	Mean	\$106.46	\$108.90	\$104.62	\$70.00	\$86.88	\$131.27	\$90.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$197.53	\$211.19	\$184.94	\$184.21	\$203.10	\$201.56	\$57.14
	Median	\$0	\$0	\$0	\$0	\$0	\$20	\$0
GIFT- OTHER	Mean	\$124.93	\$136.27	\$114.24	\$176.32	\$108.85	\$139.60	\$21.43
	Median	\$0	\$0	\$0	\$0	\$0	\$20	\$0
TRANS	Mean	\$49.44	\$59.98	\$39.13	\$15.00	\$53.30	\$52.66	\$2.29
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$358.36	\$365.10	\$328.93	\$574.74	\$364.48	\$322.71	\$640.57
	Median	\$1	\$20	\$0	\$0	\$20	\$0	\$0
TOTAL	Mean	\$985.72	\$1,055.32	\$896.67	\$1,136.68	\$977.16	\$996.96	\$847.14
	Median	\$750	\$800	\$650	\$500	\$800	\$700	\$600



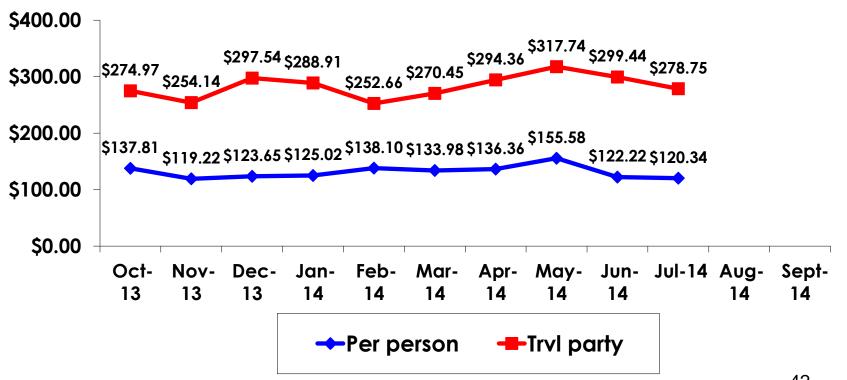
# On-Island Expenditures First time vs. Repeat

		TOTAL	TRIPST	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$42.84	\$36.80	\$73.89
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$32.11	\$31.86	\$33.42
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$80.84	\$77.39	\$98.60
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$106.46	\$110.81	\$84.12
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$197.53	\$192.28	\$224.56
	Median	\$0	\$0	\$0
GIFT- OTHER	Mean	\$124.93	\$130.41	\$96.75
	Median	\$0	\$0	\$0
TRANS	Mean	\$49.44	\$49.48	\$49.25
	Median	\$0	\$0	\$0
OTHER	Mean	\$358.36	\$351.37	\$394.28
	Median	\$1	\$20	\$0
TOTAL	Mean	\$985.72	\$972.27	\$1,054.88
	Median	\$750	\$725	\$900



## ON-ISLE EXPENDITURES – Per Day

YTD Per Person = \$131.20 YTD Travel Party = \$282.88



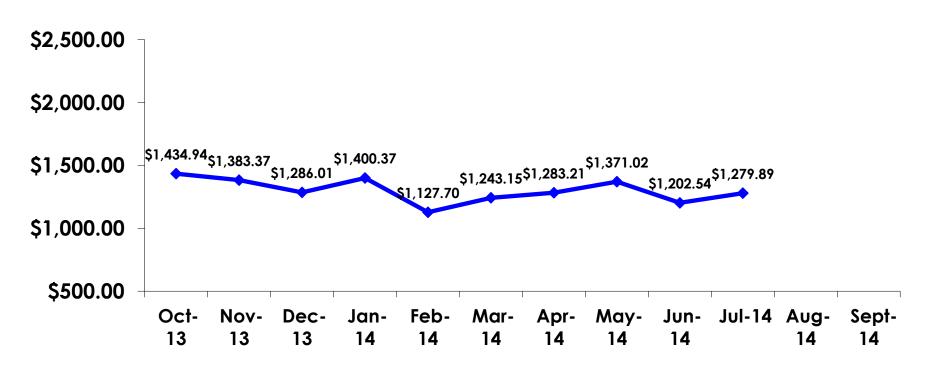


# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,279.89 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,576 = Maximum (highest amount recorded for the entire sample)



### TOTAL EXPENDITURES Per Person



YTD=\$1,301.14



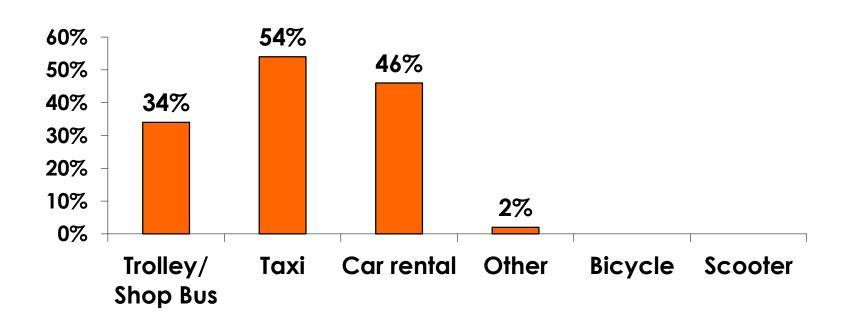
# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$42.84
Food & beverage in fast food restaurant/convenience store	\$32.11
Food & beverage at restaurants or drinking establishments outside a hotel	\$80.84
Optional tours and activities	\$106.46
Gifts/souvenirs for yourself/companions	\$197.53
Gifts/ souvenirs for friends/family at home	\$124.93
Local transportation	\$49.44
Other expenses not covered	\$358.36
Average Total	\$985.72



### **Local Transportation**

n=136



Mean=\$49.44 per travel party



### **Guam Airport Expenditures**

- \$62.68 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,700 = Maximum (highest amount recorded for the entire sample)



### Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$8.68
Gifts/Souvenirs Self	\$29.13
Gifts/Souvenirs Others	\$24.87
Total	\$62.68



## SECTION 4 VISITOR SATISFACTION

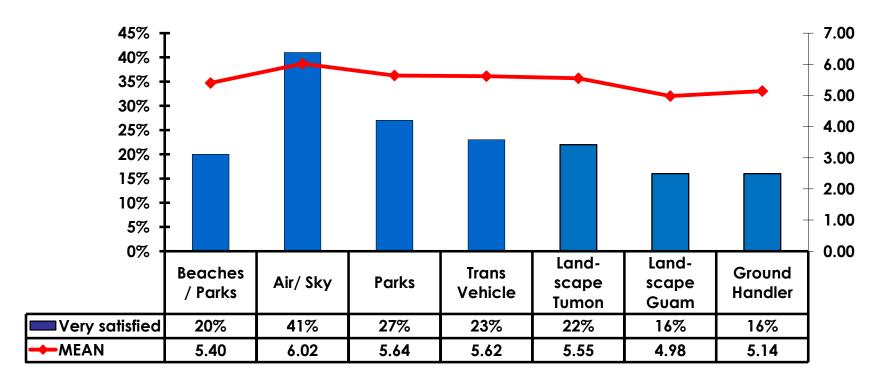


#### **Satisfaction Scores Overall**



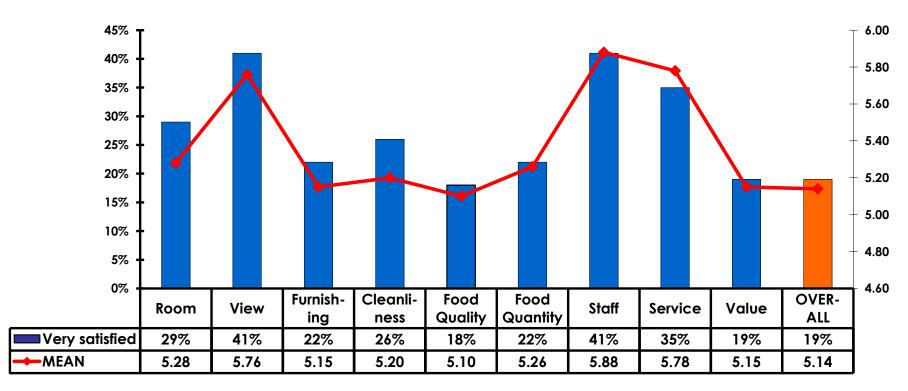


#### Satisfaction Quality/ Cleanliness



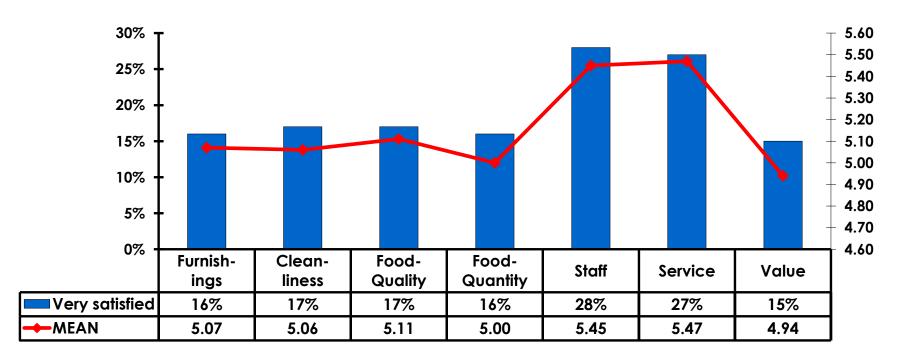


### Quality of Accommodations



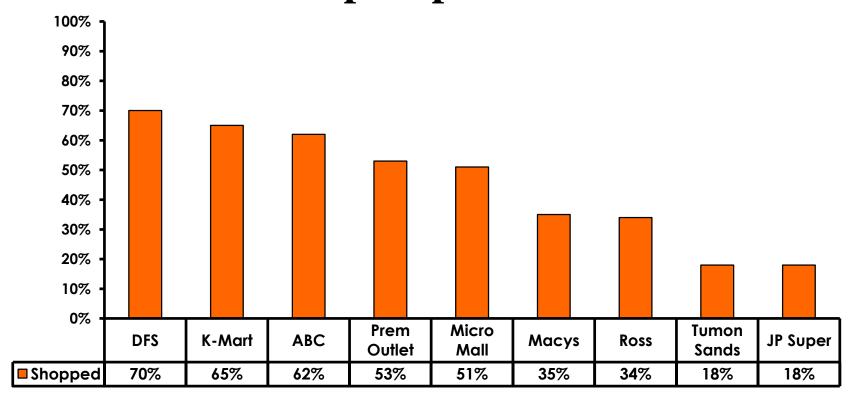


### **Quality of Dining Experience**





### Visits to Shopping Centers/Malls on Guam Top responses





### Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>54%</b>	Score of 6 to 7 = <b>51%</b>
Score of 4 to 5 = <b>37%</b>	Score of 4 to 5 = <b>39%</b>
Score 1 to 3 = <b>9</b> %	Score 1 to 3 = <b>10%</b>
MEAN = 5.36	MEAN = 5.23

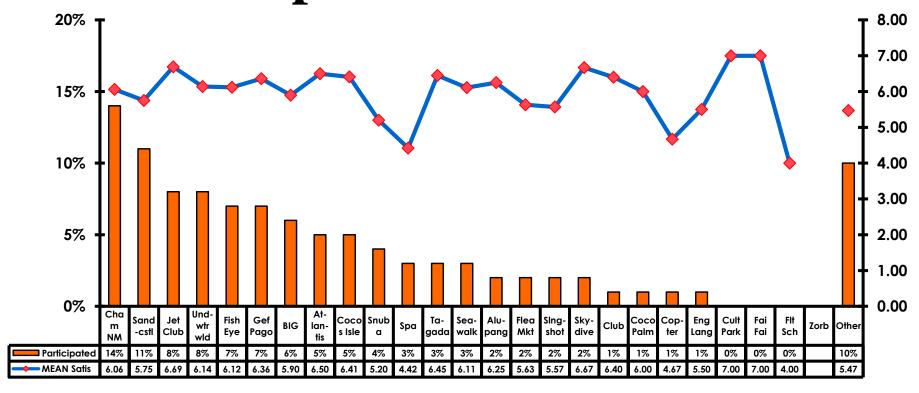


### **Optional Tour Participation**

 Average number of tours participated in is 1.33 One or None more 43% **57%**.



# Optional Tours Participation & Satisfaction





#### **Day Tours Satisfaction**

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>44%</b>	Score of 6 to 7 = <b>34%</b>
Score of 4 to 5 = <b>49%</b>	Score of 4 to 5 = <b>53</b> %
Score 1 to 3 = <b>8%</b>	Score 1 to 3 = <b>13</b> %
MEAN = 5.05	MEAN = 4.74

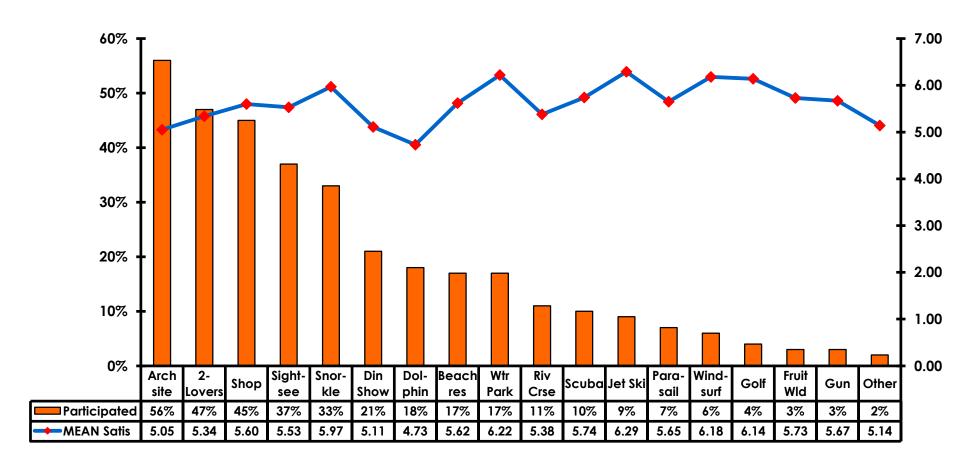


### **Night Tours Satisfaction**

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>22%</b>	Score of 6 to 7 = <b>26%</b>
Score of 4 to 5 = <b>59%</b>	Score of 4 to 5 = <b>57%</b>
Score 1 to 3 = <b>18%</b>	Score 1 to 3 = <b>17%</b>
MEAN = 4.35	MEAN = 4.44

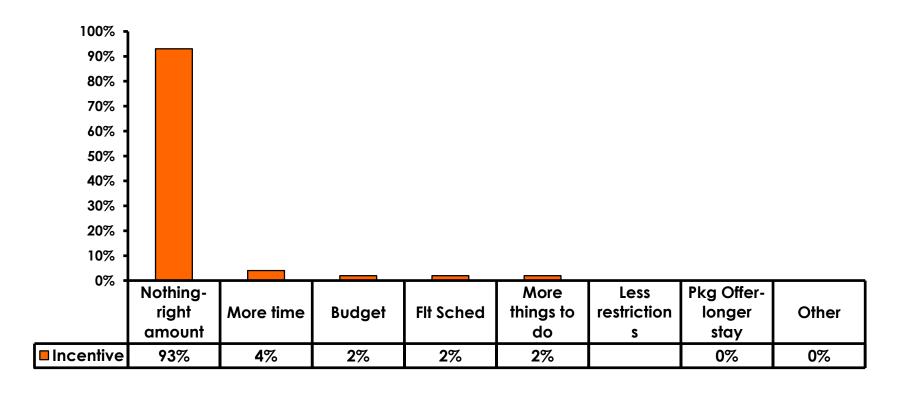


#### Satisfaction with Other Activities





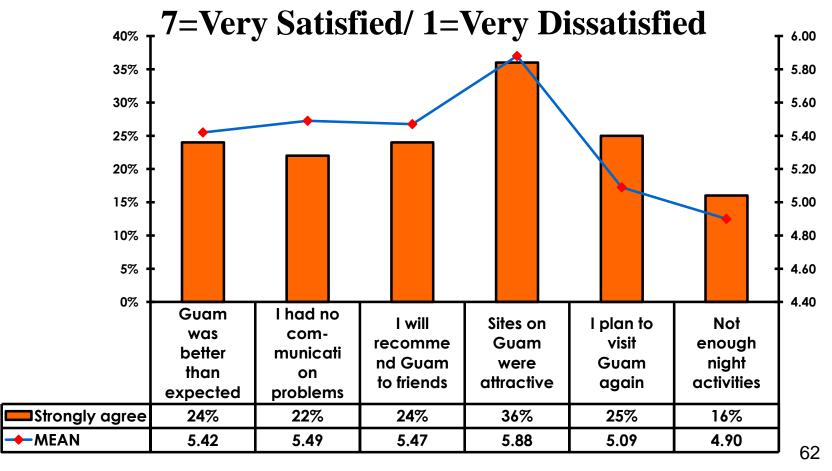
### What would it take to make you want to stay an extra day in Guam?





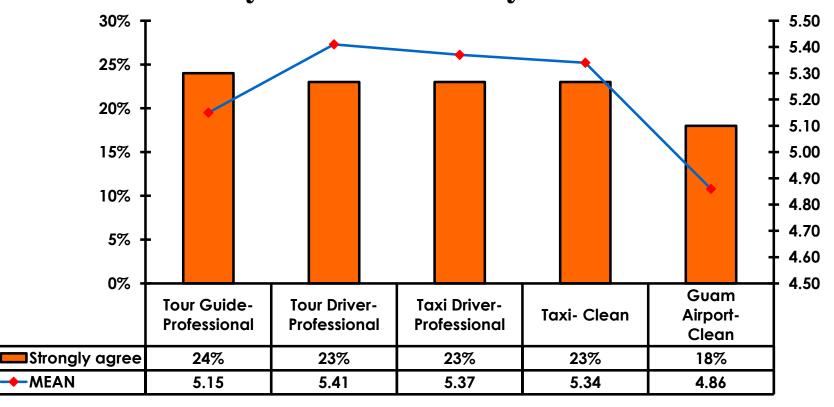
### **On-Island Perceptions**

7pt Rating Scale





### **On-Island Perceptions**

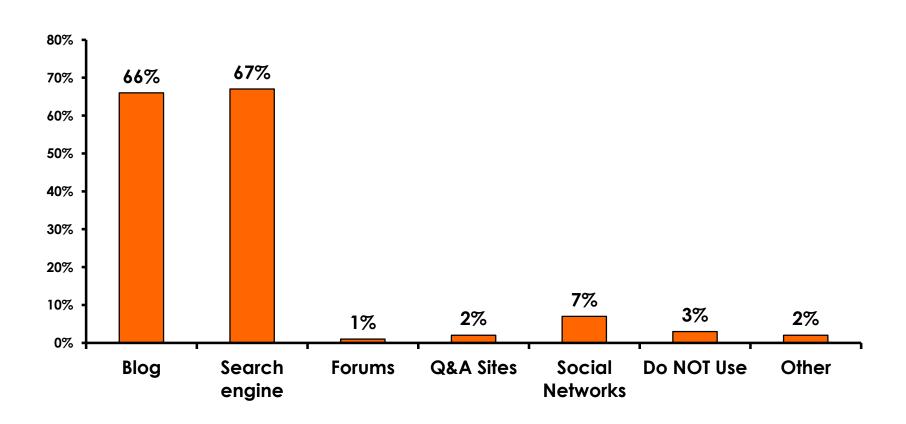




## SECTION 5 PROMOTIONS

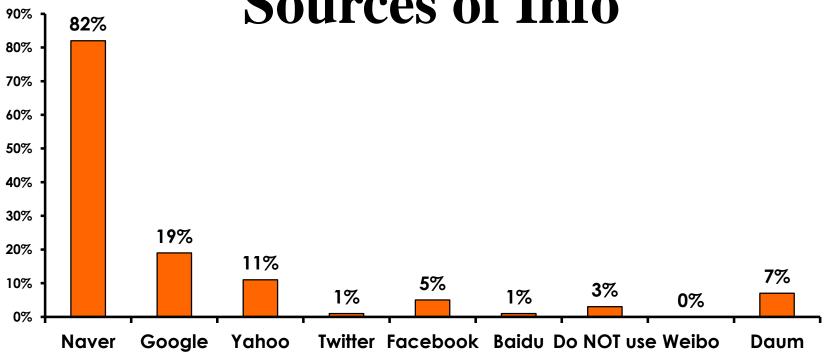


#### **Internet- Guam Sources of Info**



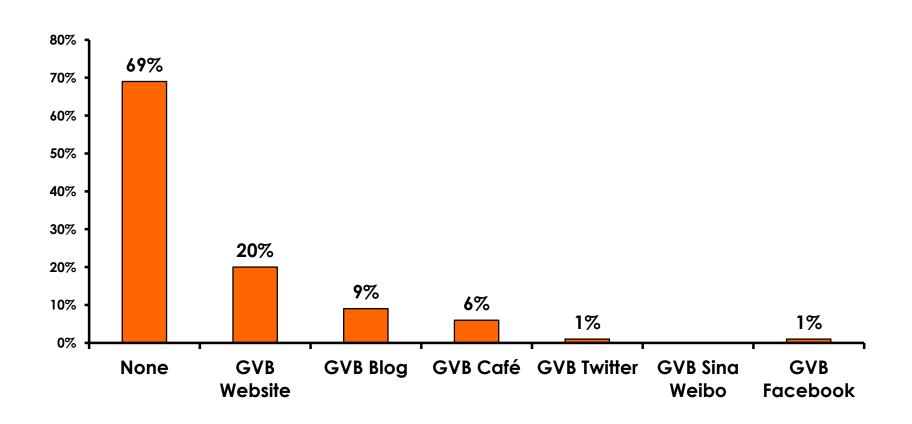


# Internet- Things To Do Sources of Info



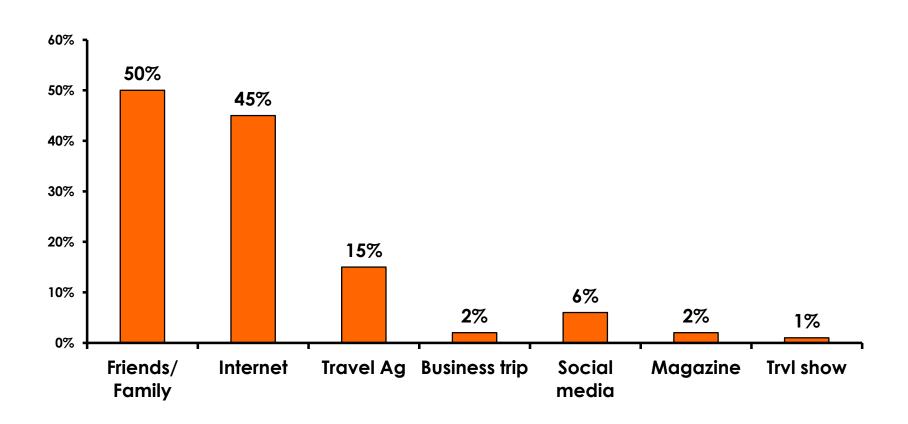


#### **Internet- GVB Sources**



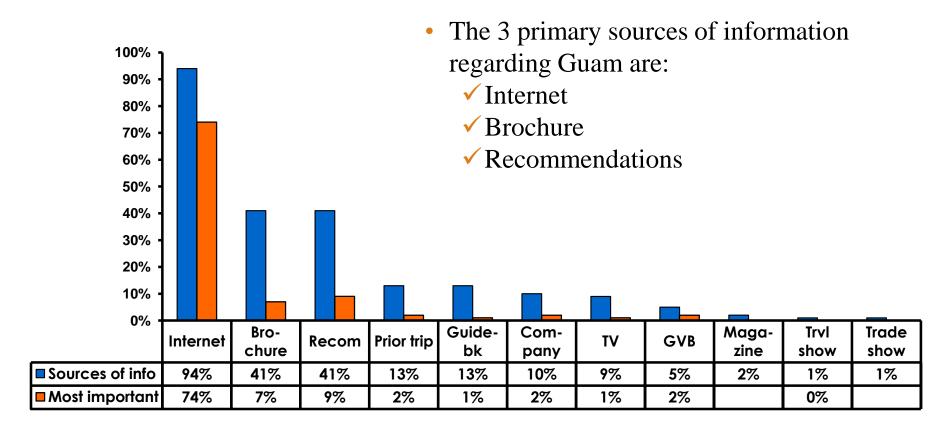


#### **Travel Motivation- Info Sources**



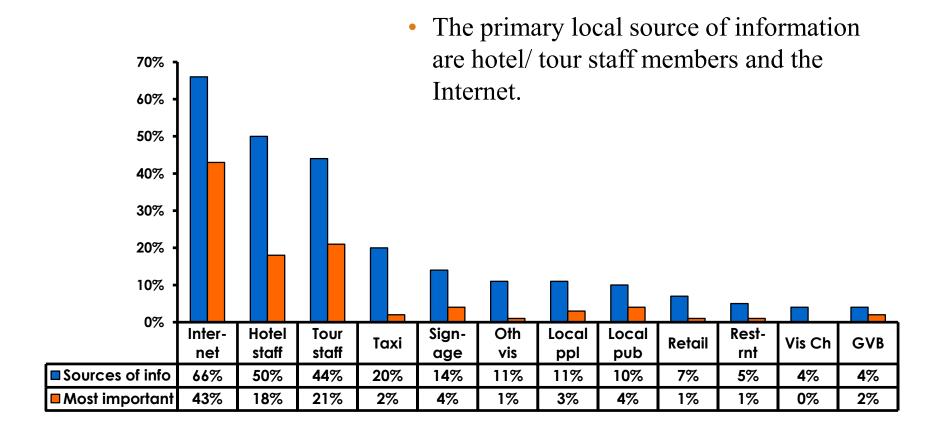


#### **Sources of Information Pre-arrival**





#### **Sources of Information Post-arrival**

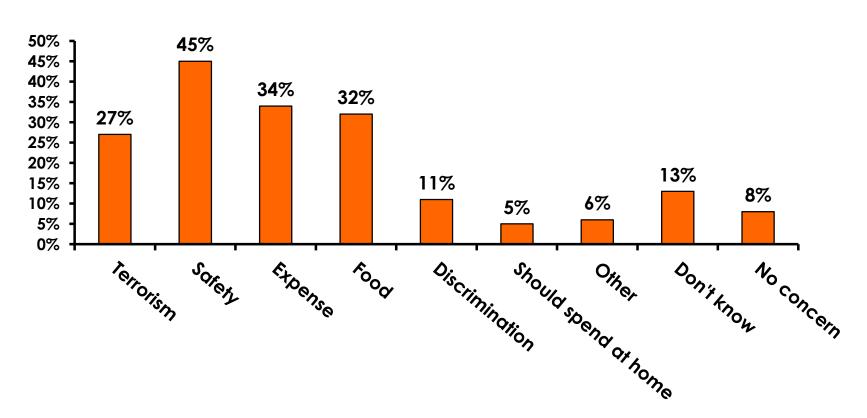




## SECTION 6 OTHER ISSUES



## Concerns about travel outside of Korea - Overall



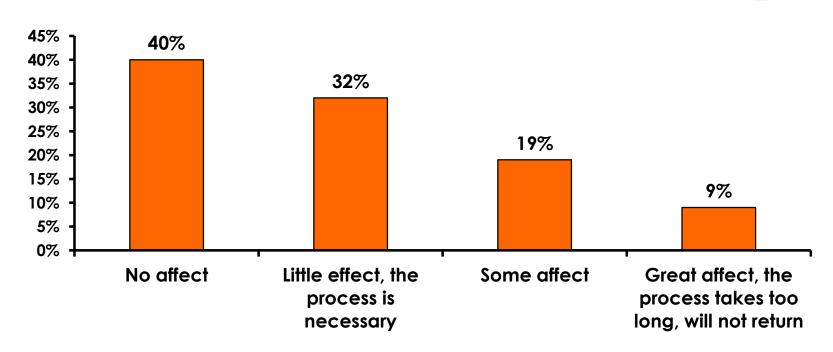


## Concerns about travel outside of Korea - By Age & Income

		TOTAL	AGE				Q26							
		-	18-24	25-34	35-49	50+	<kw12.0m< td=""><td>KW12.0M- KW24.0M</td><td>KW24.0M- KW36.0M</td><td>KW36.0M- KW48.0M</td><td>KW48.0M- KW60.0M</td><td>KW60.0M- KW72.0M</td><td>KW72.0M+</td><td>No Income</td></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	45%	42%	41%	49%	29%	67%	45%	52%	44%	54%	45%	49%	35%
	Expense	34%	37%	32%	37%	29%		36%	52%	38%	48%	41%	30%	17%
	Food	32%	53%	33%	31%		33%	36%	39%	33%	35%	35%	31%	22%
	Terrorism	27%	16%	26%	29%	29%	33%	18%	18%	27%	37%	27%	28%	17%
	Don't know	13%	11%	13%	12%	14%			21%	8%	4%	8%	11%	17%
	Discrimination against Koreans	11%	16%	9%	12%	14%		18%	18%	8%	10%	12%	9%	22%
	No concerns	8%	5%	12%	5%			18%	3%	2%	10%	12%	6%	13%
	Other	6%	11%	8%	4%		33%	9%	3%	6%		10%	7%	4%
	Should spend at home	5%	21%	4%	4%			9%	6%	6%	8%	4%	3%	4%
	Total Count	349	19	153	167	7	3	11	33	48	52	49	102	23



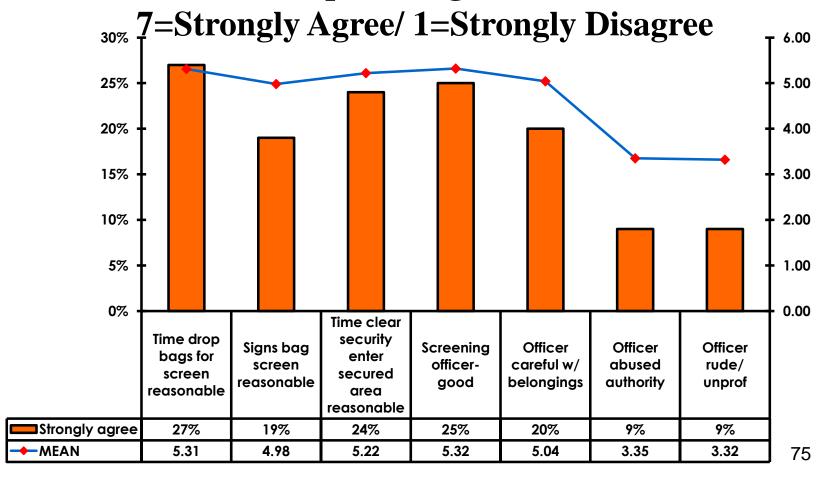
## Security Screening/Immigration Process at Guam International Airport





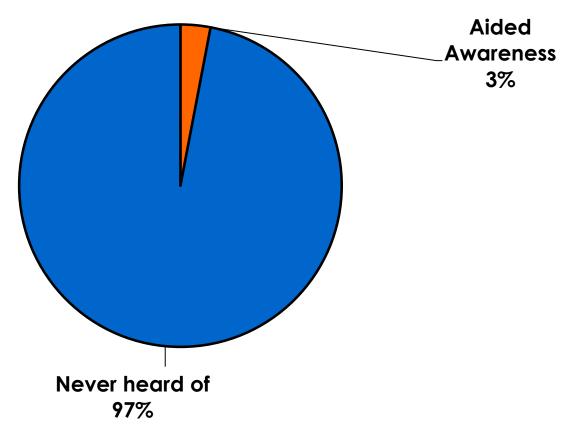
### **Airport Screening**

7pt Rating Scale





### **Shop Guam Festival**





### **Shop Guam Festival - Impact** n=12

