



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2014

MARCH 2014



Prepared by: QMark Research

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Background & Methodology

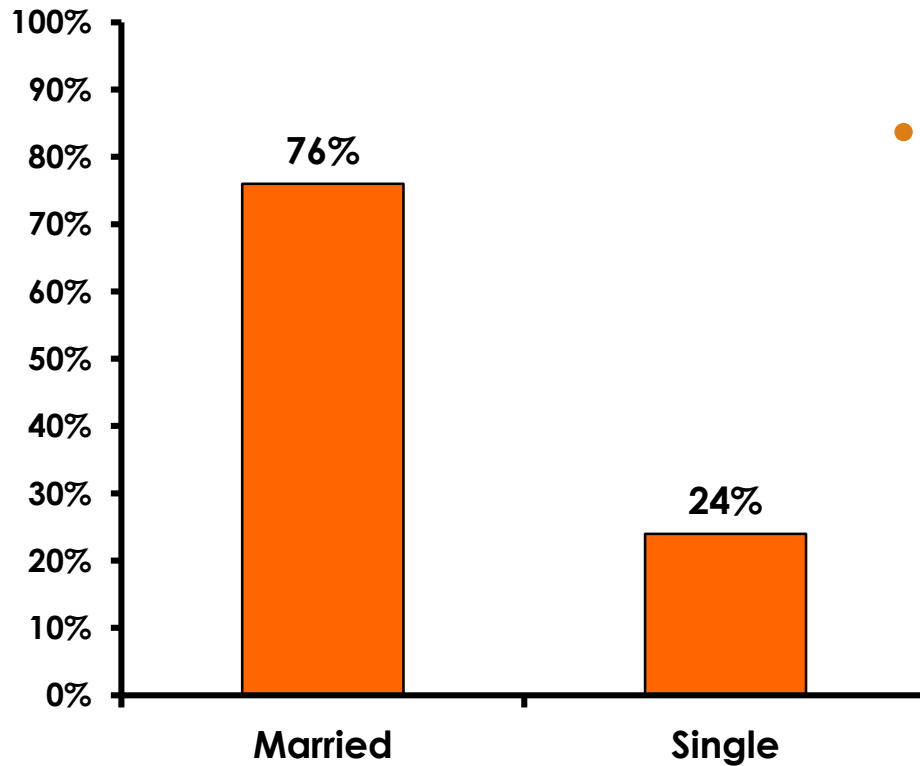
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing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

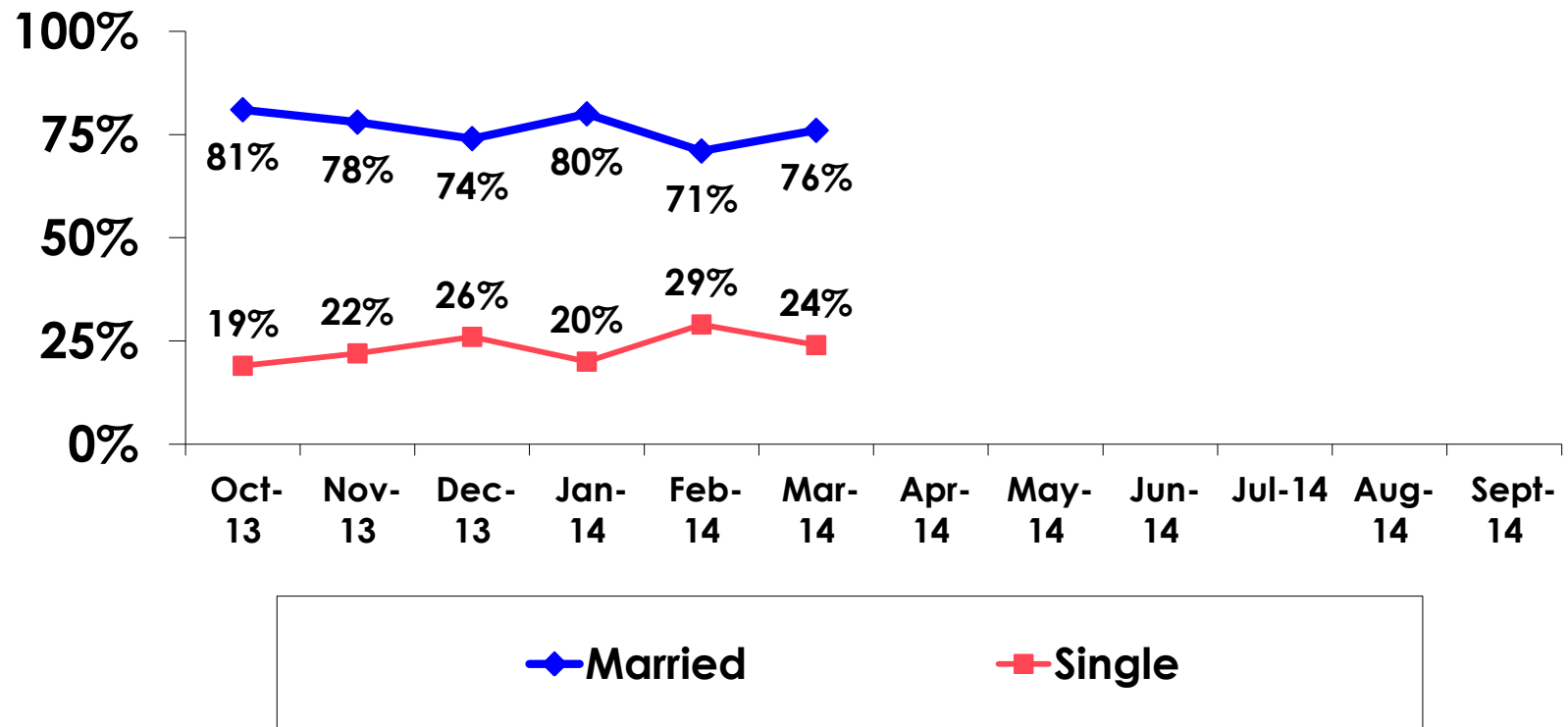
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

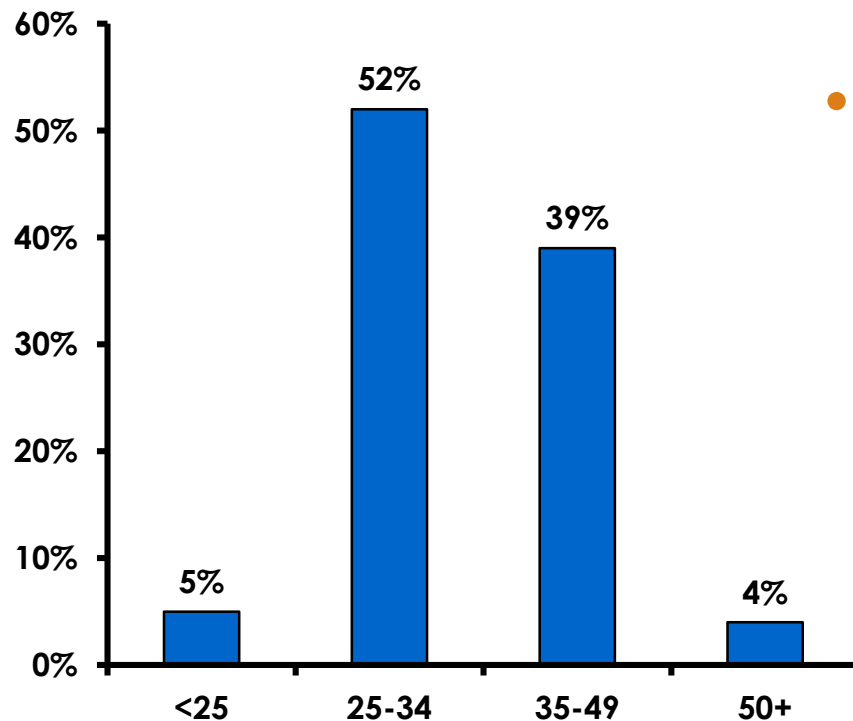


- Majority of Korean visitors are married.

MARITAL STATUS

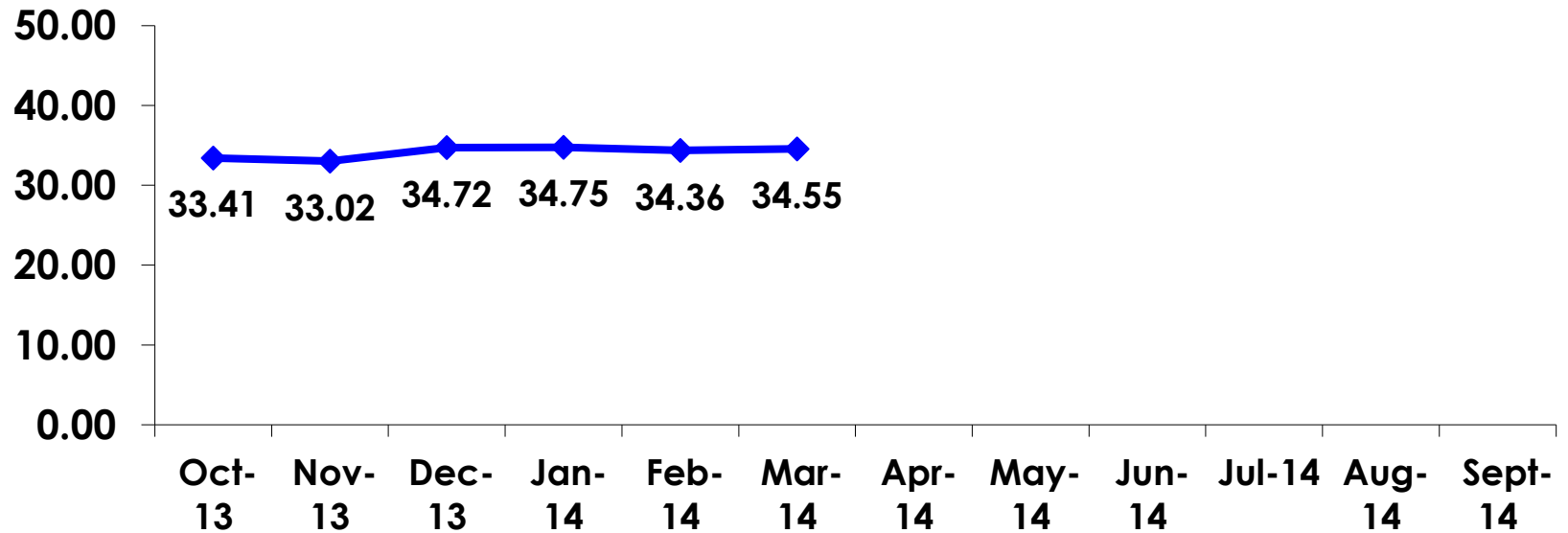


Age - Overall

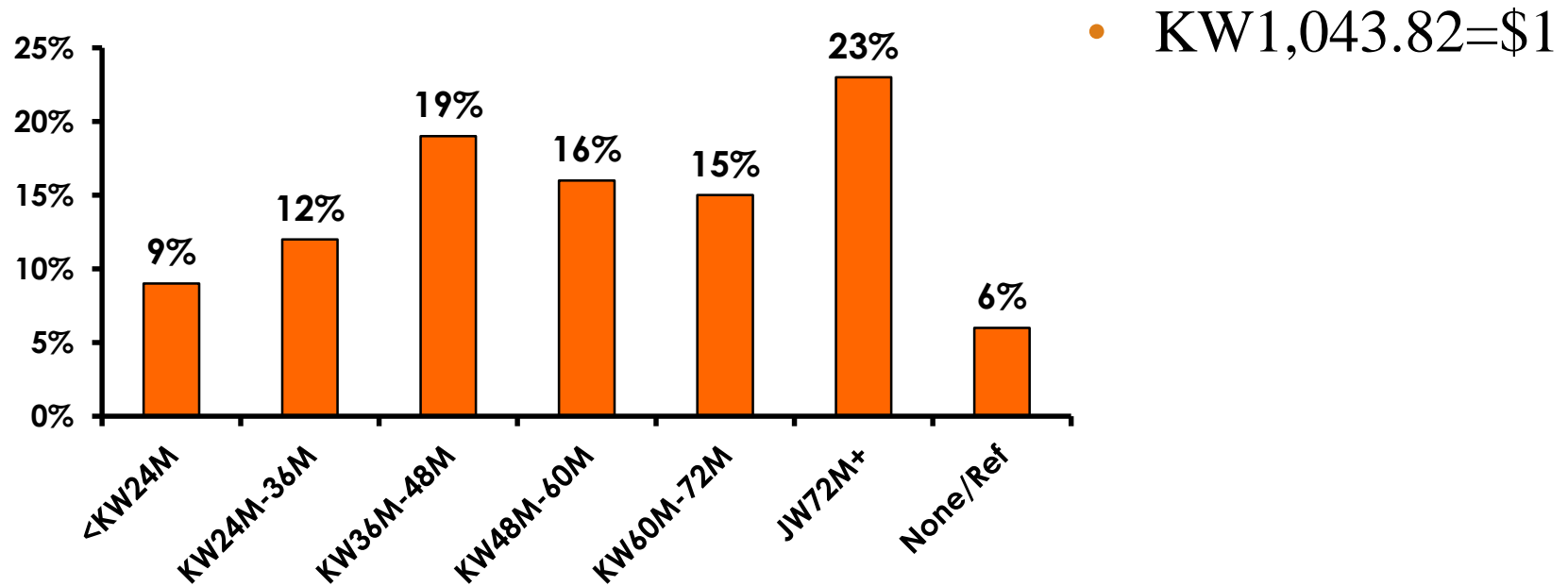


- The average age of the respondents is 34.55 years of age.

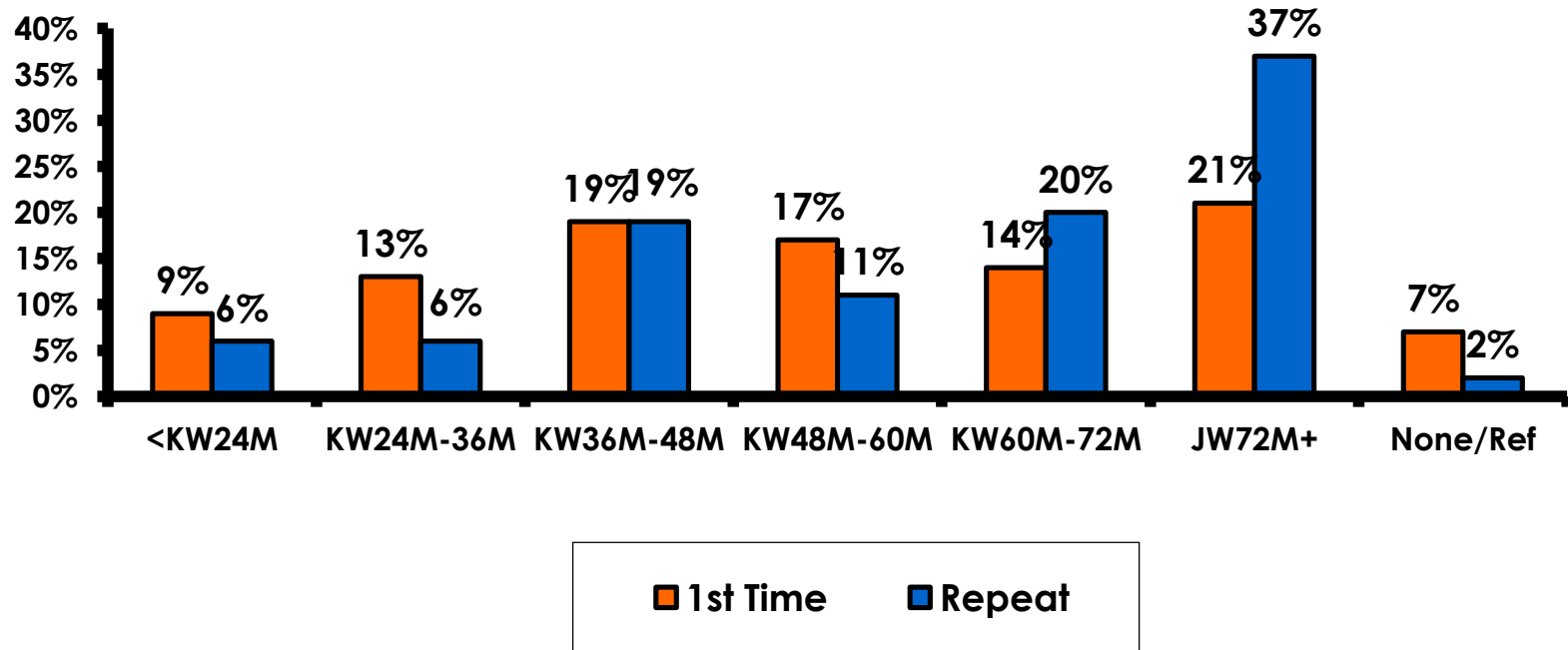
AVERAGE - AGE



Personal Income



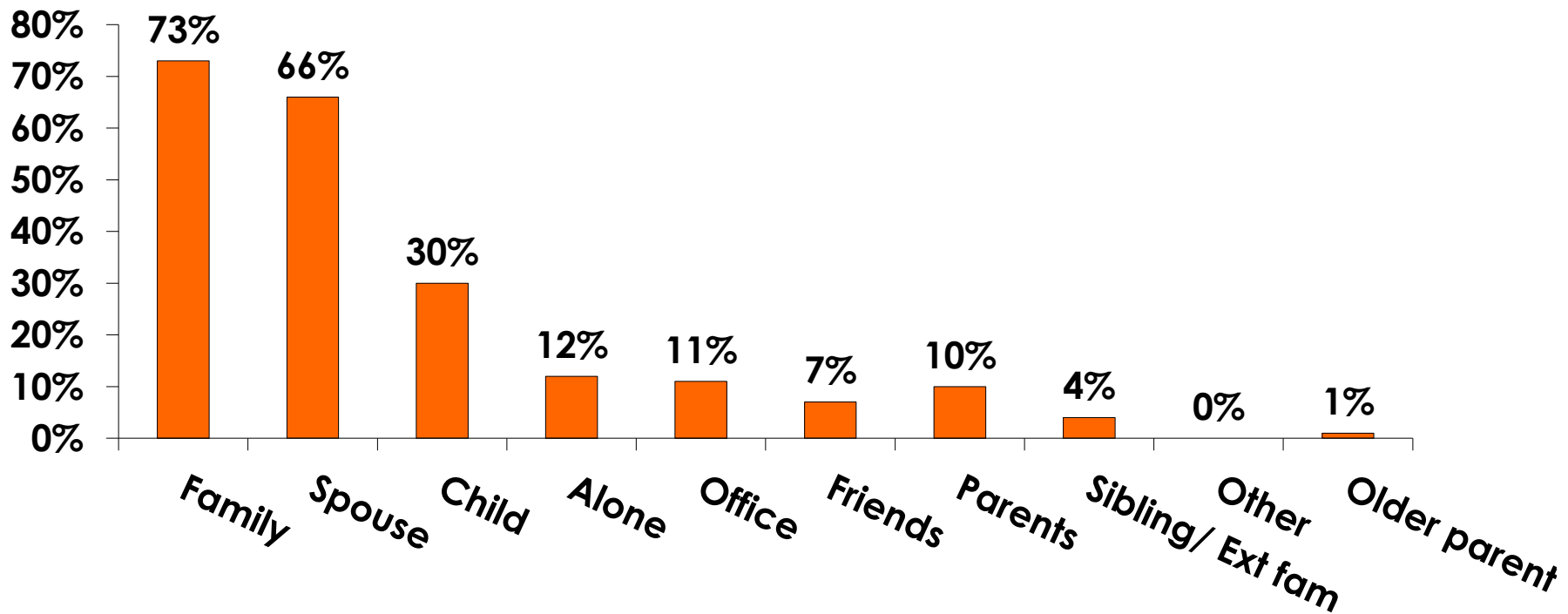
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<KW12.0M	Count	7	2	5		5	1	1
		Column N %	2%	1%	3%		3%	1%	7%
	KW12.0M-KW24.0M	Count	23	10	13		18	3	
		Column N %	7%	6%	8%		11%	2%	
	KW24.0M-KW36.0M	Count	40	19	21	4	27	8	
		Column N %	12%	11%	12%	27%	16%	6%	
	KW36.0M-KW48.0M	Count	63	28	35	2	44	13	3
		Column N %	19%	17%	21%	13%	26%	10%	21%
	KW48.0M-KW60.0M	Count	54	28	26	3	28	20	1
		Column N %	16%	17%	15%	20%	16%	16%	7%
	KW60.0M-KW72.0M	Count	49	29	20		17	28	3
		Column N %	15%	17%	12%		10%	22%	21%
	KW72.0M+	Count	78	46	32	1	20	50	6
		Column N %	23%	28%	19%	7%	12%	40%	43%
	No Income	Count	21	4	17	5	11	3	
		Column N %	6%	2%	10%	33%	6%	2%	
	Total	Count	335	166	169	15	170	126	14

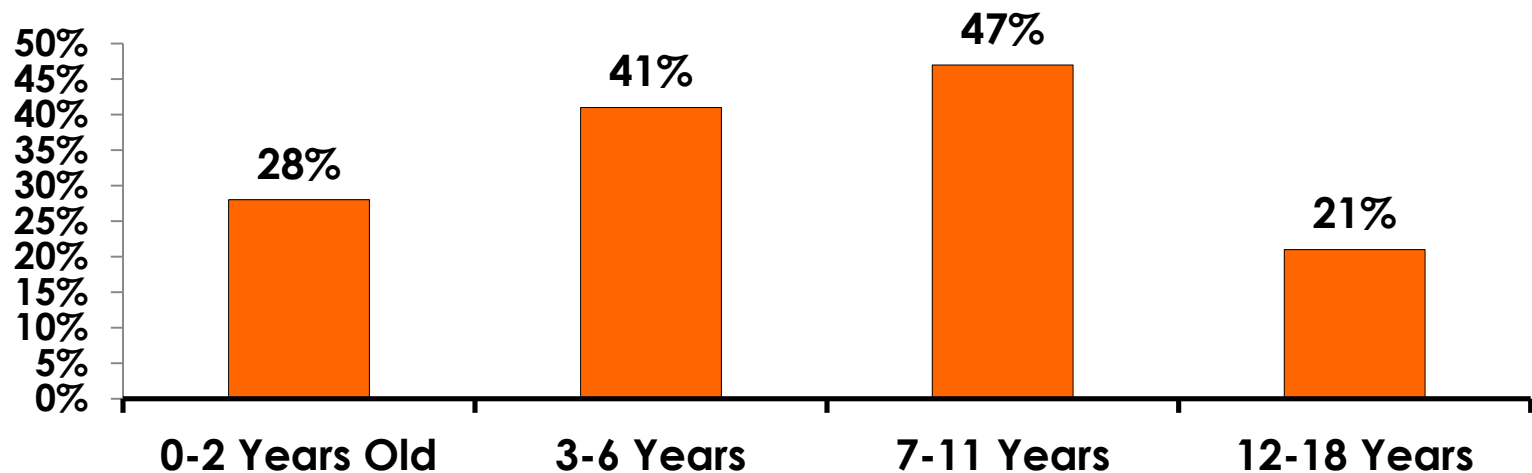
Travel Companions



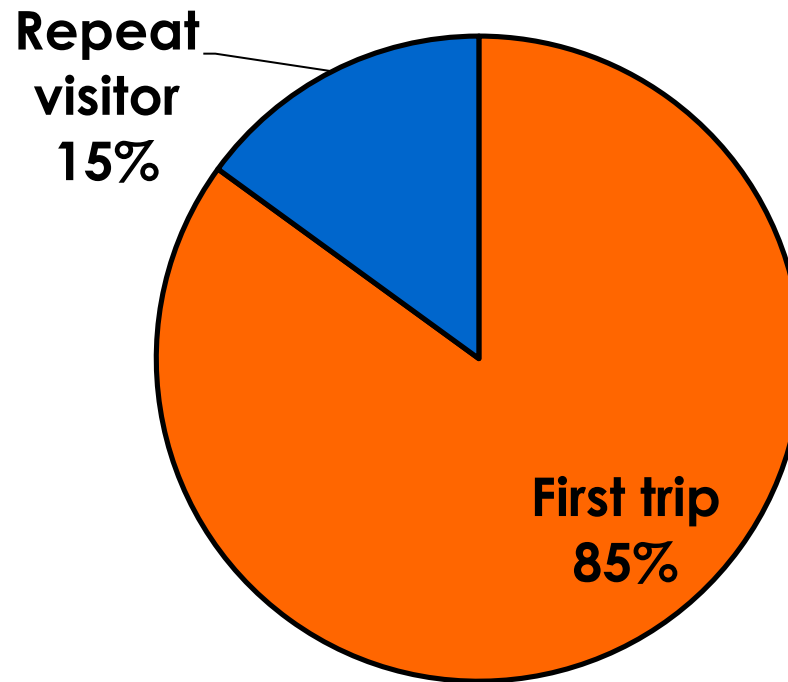
Number of Children Travel Party

N=106 total respondents traveling with children.

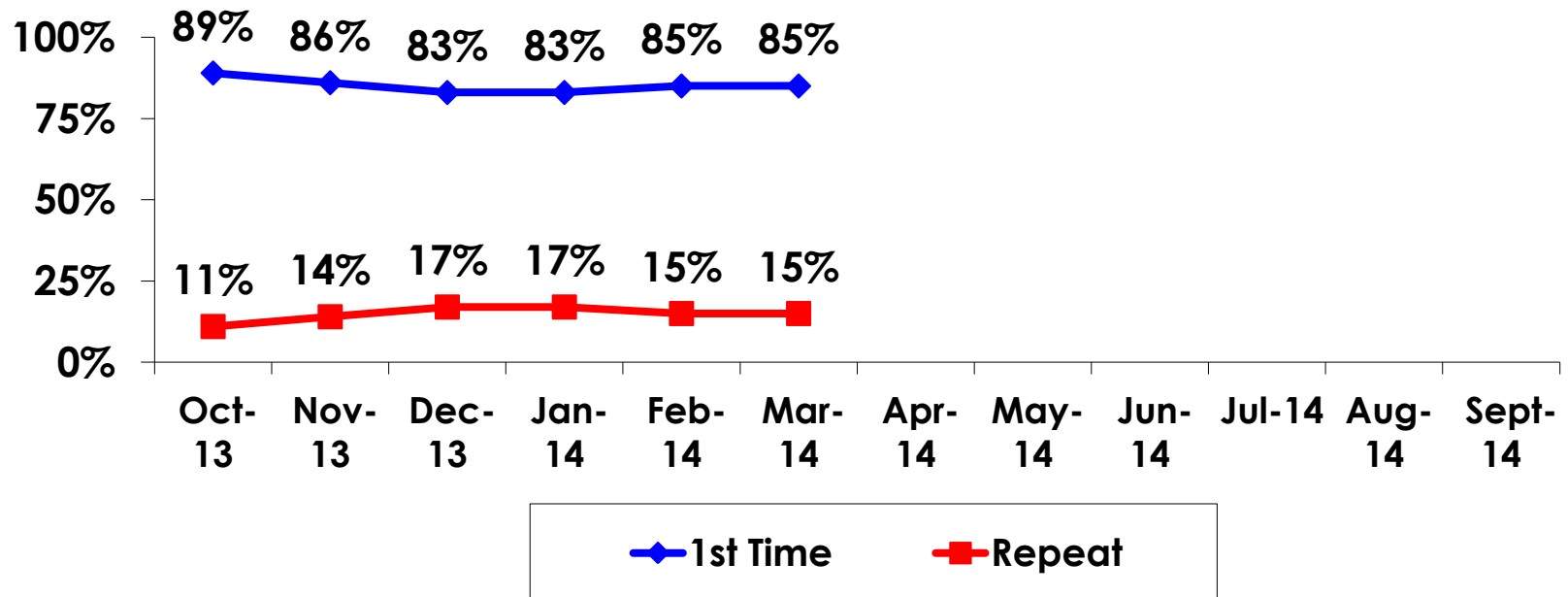
(Of those N=106 respondents, there is a total of 168 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM

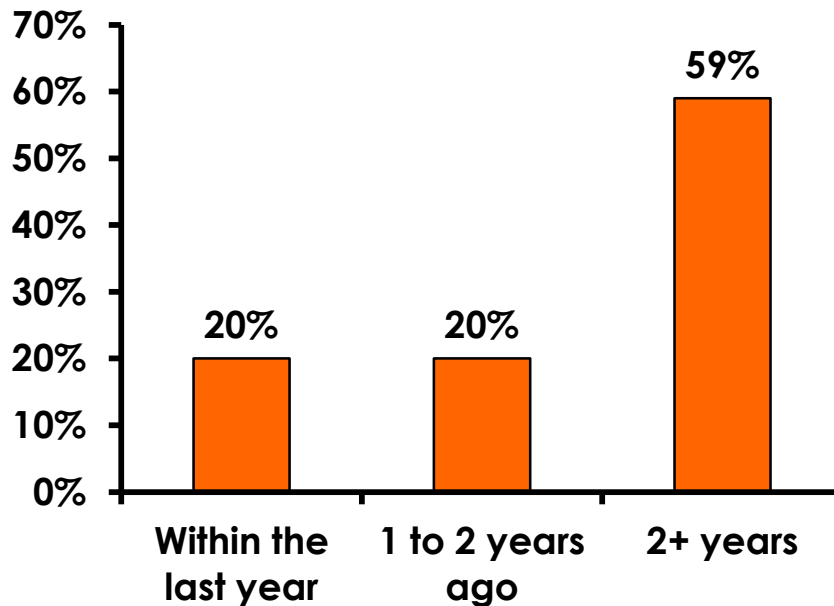


Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	175	148	27	
		Column N %	50%	50%	50%	
	Female	Count	176	149	27	
		Column N %	50%	50%	50%	
	Total	Count	351	297	54	
AGE	18-24	Count	16	14	2	
		Column N %	5%	5%	4%	
	25-34	Count	177	160	17	
		Column N %	52%	56%	32%	
	35-49	Count	133	103	30	
		Column N %	39%	36%	57%	
	50+	Count	14	10	4	
		Column N %	4%	3%	8%	
		Total	Count	340	287	53

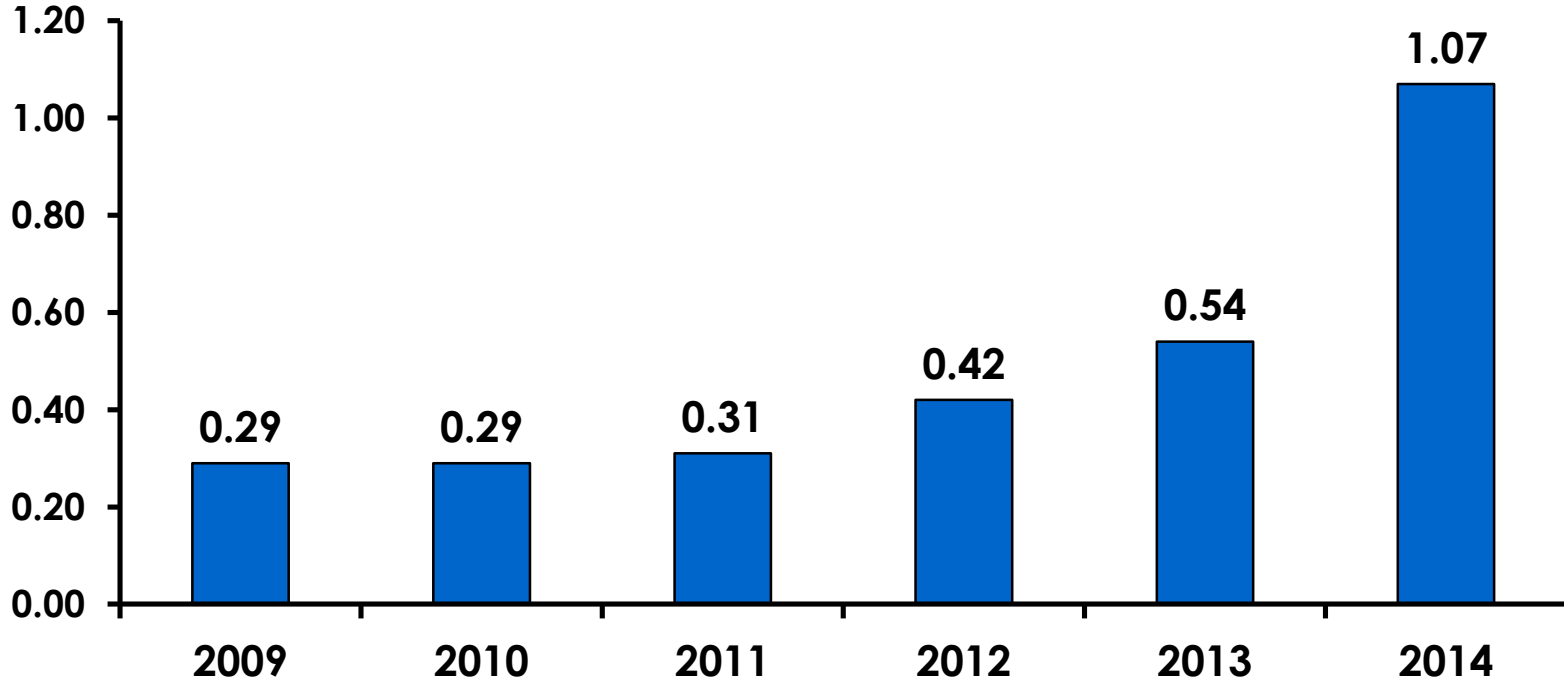
Repeat Visitors Last Trip

n = 54



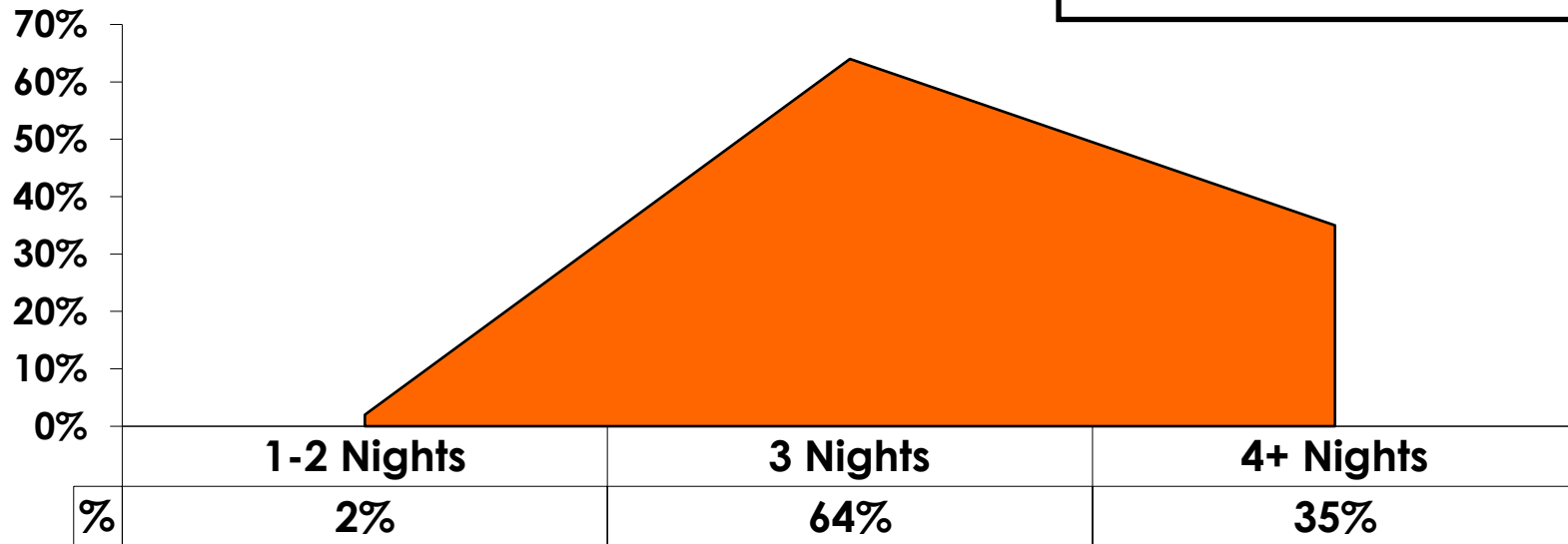
- The average repeat visitor has been to Guam 2.20 times.
- Less than half of repeat visitors have been here within the last year.

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

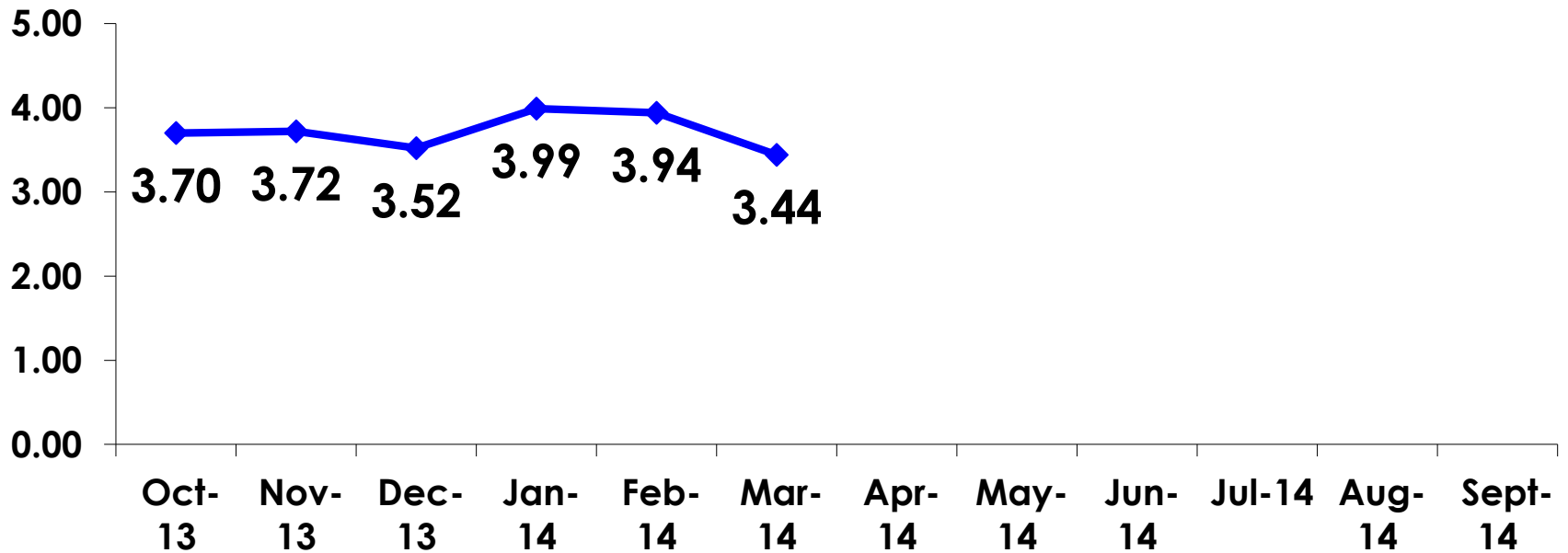


Length of Stay

Mean = 3.44 Days
Median = 3.0 Days



AVG LENGTH OF STAY

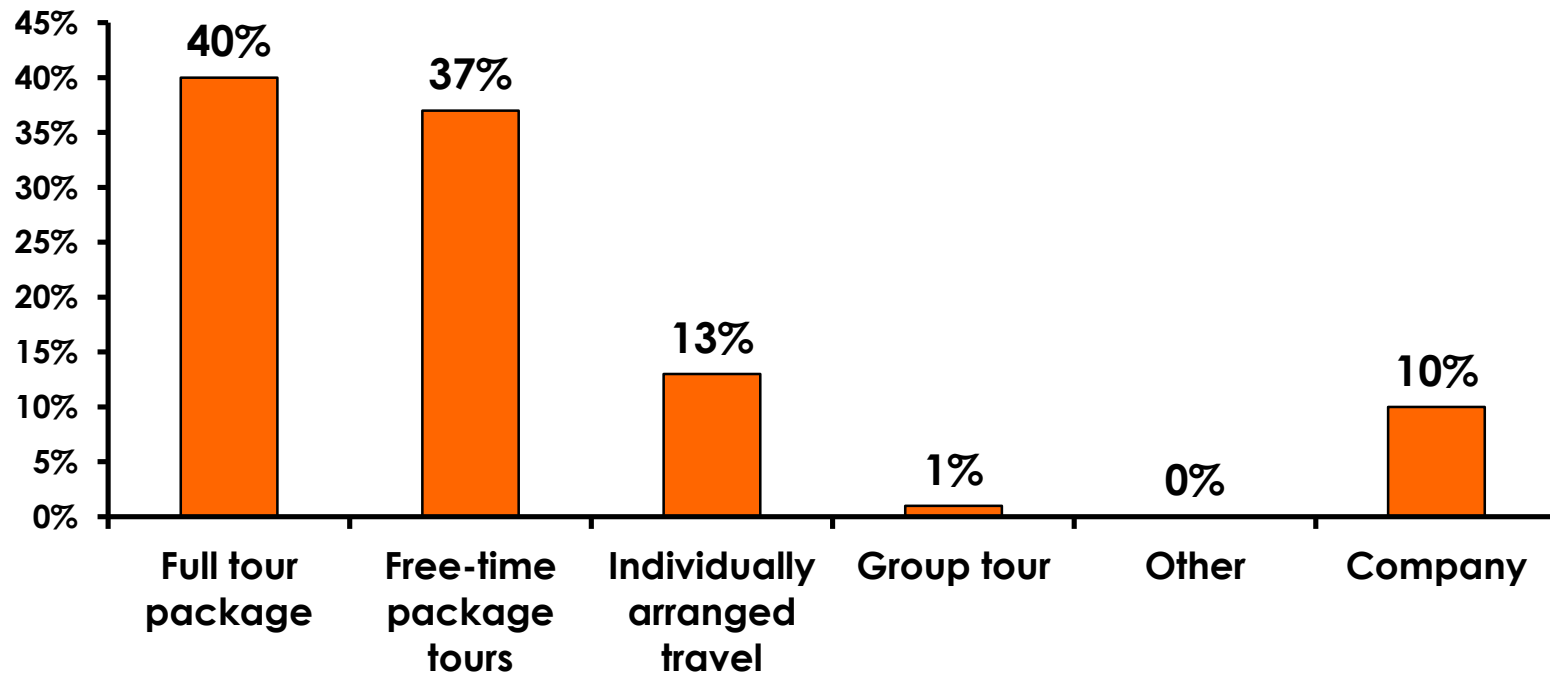


Occupation by Income

		TOTAL	Q26							No Income	
		-	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+		
Q25	White Collar Office Worker	24%	14%	30%	18%	29%	31%	23%	24%		
	Housewife/ Homemaker	15%	14%	17%	5%	16%	22%	19%	6%	35%	
	Self-employed	14%	29%	13%	15%	10%	9%	10%	23%	10%	
	Professional/ Specialist/ Tech	11%		22%	18%	11%	7%	13%	12%		
	Service worker/ Private hse worker	5%		4%	13%	6%	2%	4%	5%		
	Sales worker/ Clerical	5%			8%	3%	4%	4%	10%		
	Student	4%	29%		3%		4%			30%	
	Other	3%		4%		2%	2%	4%	5%	5%	
	Skilled worker	3%				5%	2%	10%	1%		
	Manager/ Admin	3%			3%	5%	2%	2%	5%		
	Unemployed	3%	14%		3%	2%			1%	20%	
	Professor/ Teacher/ After-school	3%		4%	3%	5%	2%	4%	1%		
	Govt- office worker non-mgr	2%			5%	5%	6%				
	Freelancer	1%			3%	3%		2%	1%		
	Govt- Executive	1%					4%	2%	3%		
	Govt- Manager	1%		4%	3%			2%	1%		
	Judicial	0%					2%				
	Retired	0%			3%						
	Farmer/ Forestry/ Fisherman	0%					2%				
	Total	Count	340	7	23	39	63	54	48	78	20

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

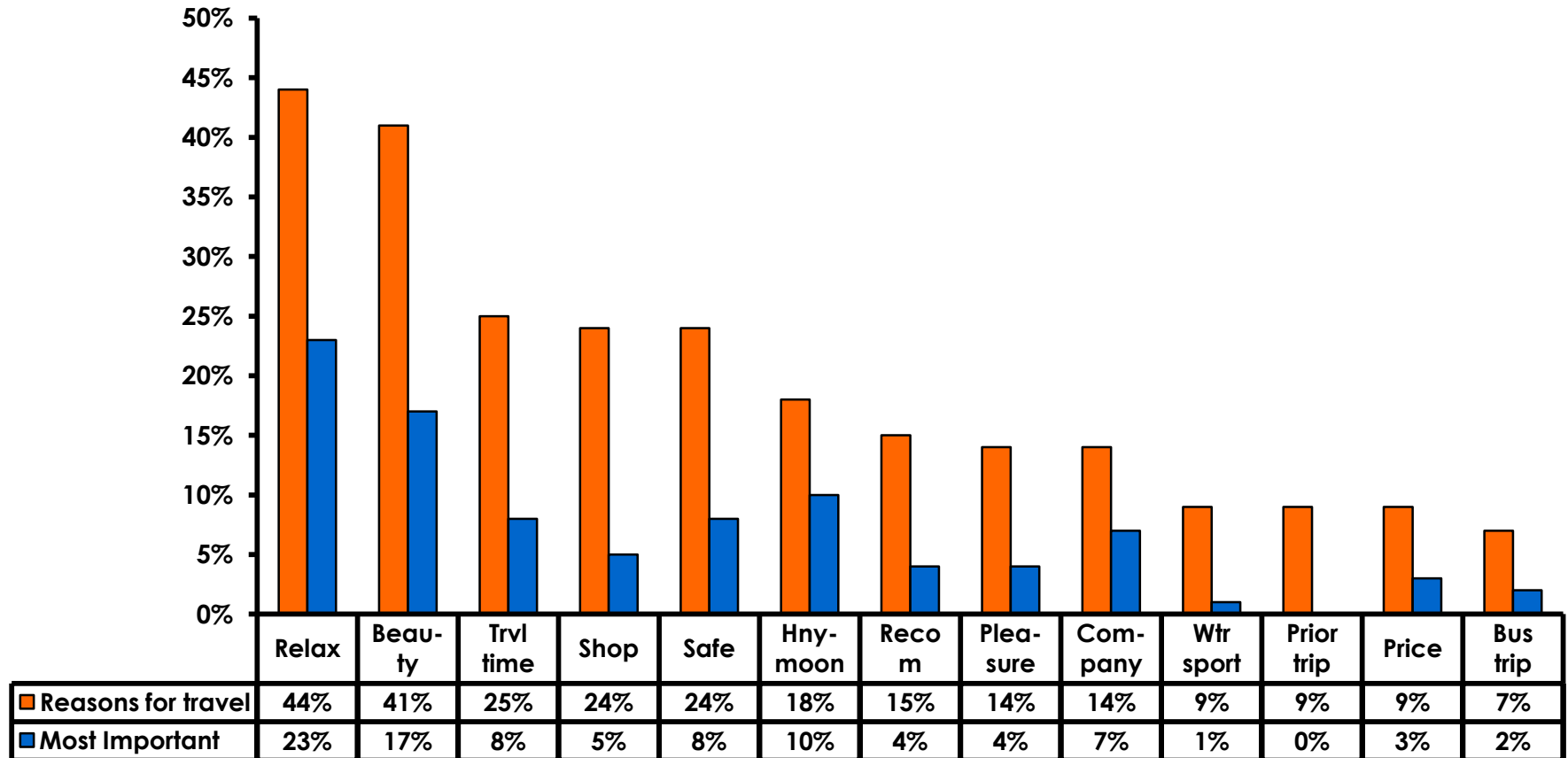


Accommodation by Income

Average length of stay: 3.44 days

		TOTAL	Q26							No Income
		-	<KW12.0M	KW12.0M-KW24.0M	KW24.0M-KW36.0M	KW36.0M-KW48.0M	KW48.0M-KW60.0M	KW60.0M-KW72.0M	KW72.0M+	
Q9	PIC Club	36%	29%	43%	33%	29%	33%	55%	37%	14%
	Hyatt Regency Guam	18%	14%	4%	5%	11%	11%	18%	40%	10%
	Sheraton Laguna Guam	9%	14%	22%	15%	16%	11%		4%	5%
	Hotel Nikko Guam	8%	14%	4%	8%	8%	11%	6%	6%	
	Westin Resort Guam	5%		4%		5%	13%	4%	3%	5%
	Outrigger Guam Resort	5%		4%	18%	6%	2%			10%
	Hilton Guam Resort	4%		4%	3%	6%	7%		1%	14%
	Home stay/ friend/ relative	3%			13%	2%	2%	2%		14%
	Onward Beach Resort	3%	14%	9%		2%	4%	4%	1%	5%
	Leo Palace Resort	2%				2%		2%	3%	10%
	Holiday Resort Guam	1%	14%		3%	3%			1%	
	Fiesta Resort Guam	1%		4%		2%	4%			
	Guam Reef & Olive Spa	1%			3%				3%	5%
	Apartment	1%				2%		2%		
	Royal Orchid Guam	1%				2%			1%	
	Pacific Bay Hotel	1%			3%			2%		
	Oceanview Hotel	1%						2%		5%
	Bayview Hotel	1%				3%				
	Guam Marriott Resort	1%				2%		2%		
	Hotel Santa Fe	0%					2%			
	Condo	0%				2%				
	Grand Plaza Hotel	0%								5%
	Total	Count	7	23	40	63	54	49	78	21

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	44%	38%	44%	46%	43%	45%	44%	
	Natural beauty	41%	38%	38%	45%	50%	38%	44%	
	Short travel time	25%	19%	25%	27%	21%	18%	32%	
	Shopping	24%	13%	27%	22%	21%	25%	23%	
	Safe	24%	13%	20%	30%	36%	22%	25%	
	Honeymoon	18%	19%	28%	5%	7%	21%	15%	
	Recomm- friend/family/trvl agnt	15%	25%	12%	18%		10%	19%	
	Pleasure	14%	25%	14%	15%	7%	13%	15%	
	Company Sponsored	14%	19%	10%	17%	21%	12%	15%	
	Water sports	9%	6%	9%	11%	7%	10%	9%	
	Previous trip	9%	6%	5%	17%		9%	9%	
	Price	9%	6%	10%	8%	7%	9%	8%	
	Company/ Business Trip	7%	13%	5%	8%	21%	7%	7%	
	Visit friends/ Relatives	3%	25%	1%	4%		2%	4%	
	Golf	3%		3%	2%		3%	2%	
	Other	3%		2%	4%		3%	2%	
	Organized sports	3%		3%	3%		3%	2%	
	Scuba	2%	6%	2%	2%		3%	1%	
	Career Cert/ Testing	1%	6%	2%			1%	2%	
	Married/ Attn wedding	1%		1%	1%		1%		
	Convention/ Trade/ Conference	1%			2%			1%	
	Total	Count	351	16	177	133	14	175	176

Motivation by Income

		TOTAL	Q26							No Income	
		-	<KW12.0M	KW12.0M- KW24.0M	KW24.0M- KW36.0M	KW36.0M- KW48.0M	KW48.0M- KW60.0M	KW60.0M- KW72.0M	KW72.0M+		
Q5A	Relax	44%	57%	39%	60%	40%	54%	51%	36%	19%	
	Natural beauty	41%	71%	26%	40%	40%	50%	51%	33%	38%	
	Short travel time	25%	29%	22%	20%	25%	24%	27%	27%	24%	
	Shopping	24%	29%	26%	30%	19%	24%	24%	24%	14%	
	Safe	24%	29%	22%	15%	25%	26%	27%	31%	10%	
	Honeymoon	18%	14%	39%	30%	27%	20%	6%	3%	29%	
	Recomm- friend/family/trvl agnt	15%		26%	23%	8%	11%	20%	14%	10%	
	Pleasure	14%		13%	23%	17%	7%	16%	15%	10%	
	Company Sponsored	14%			13%	8%	7%	20%	28%	10%	
	Water sports	9%		4%	10%	6%	13%	18%	6%		
	Previous trip	9%		9%	3%	10%	6%	14%	15%	5%	
	Price	9%	29%	17%	5%	6%	6%	12%	5%	19%	
	Company/ Business Trip	7%	29%		3%	6%	4%	4%	17%		
	Visit friends/ Relatives	3%			3%	2%	2%	2%	4%	19%	
	Golf	3%			3%	6%	2%	2%	3%	5%	
	Other	3%					6%		6%	5%	
	Organized sports	3%			8%	3%	2%	2%	1%	5%	
	Scuba	2%				3%	4%	2%		10%	
	Career Cert/ Testing	1%	14%	4%		2%	2%			5%	
	Married/ Attn wedding	1%			3%			2%			
	Convention/ Trade/ Conference	1%				2%	2%				
	Total	Count	351	7	23	40	63	54	49	78	21

SECTION 3 **EXPENDITURES**

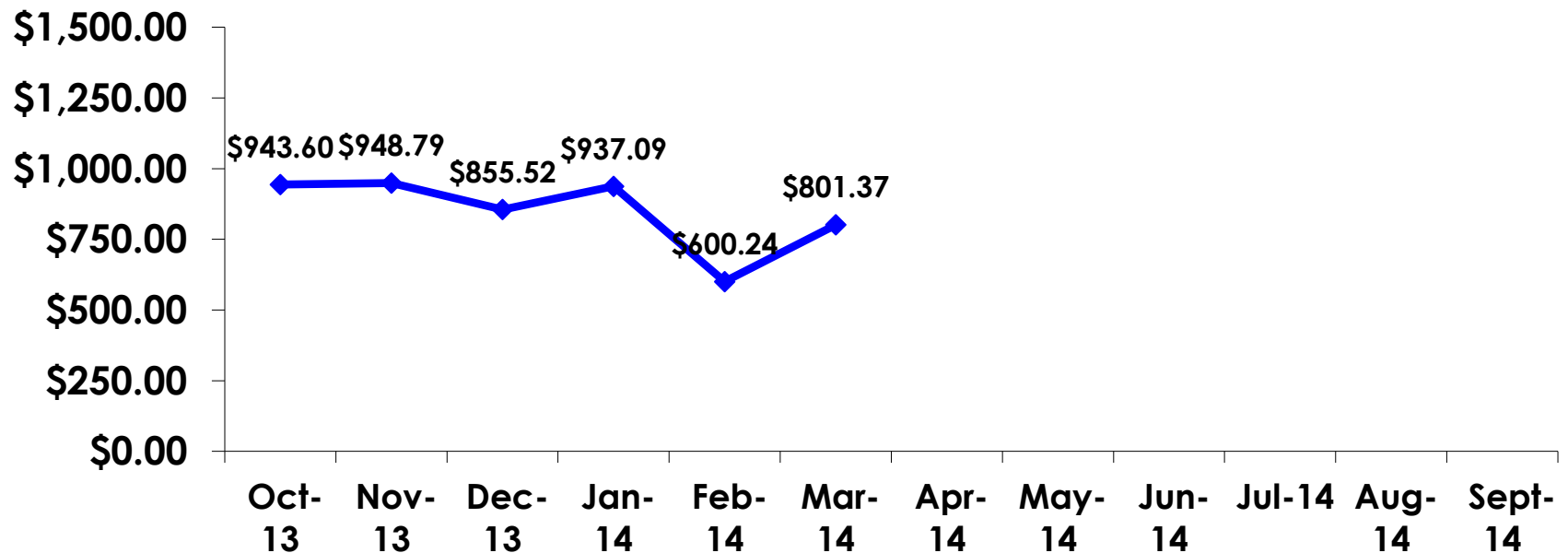
Prepaid Expenditures

KW 1,043.82/US\$1

- \$1,813.92 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$10,059 = maximum (highest amount recorded for the entire sample)
- \$801.37 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$847.65

Breakdown of Prepaid Expenditures

KW 1,043.82=\$1

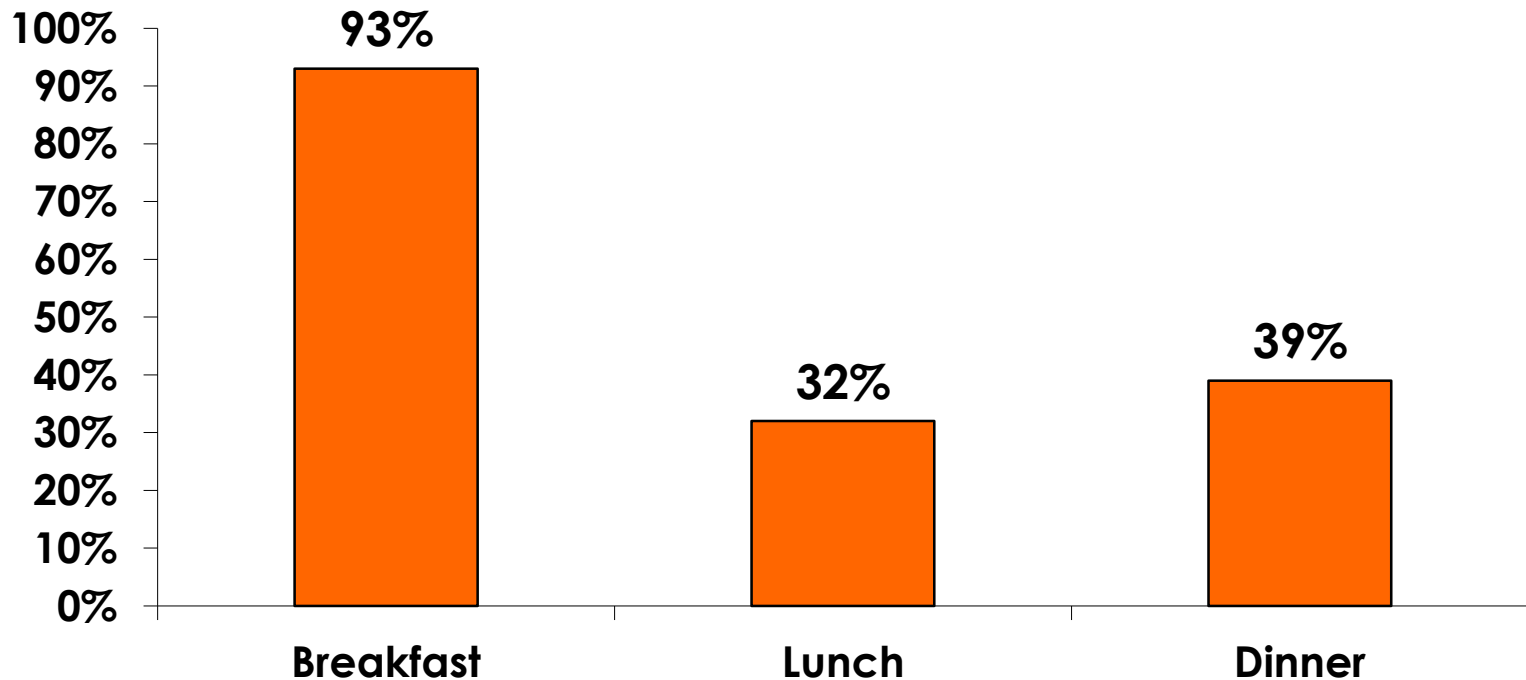
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,875.14
Air & Accommodation w/ daily meal package	\$2,519.13
Air only	\$1,156.30
Accommodation only	\$814.32
Accommodation w/ daily meal only	\$1,173.57
Food & Beverages in Hotel	\$100.59
Ground transportation – Korea	\$104.19
Ground transportation – Guam	\$148.49
Optional tours/ activities	\$298.63
Other expenses	\$320.78
Total Prepaid	\$1,813.92

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=185

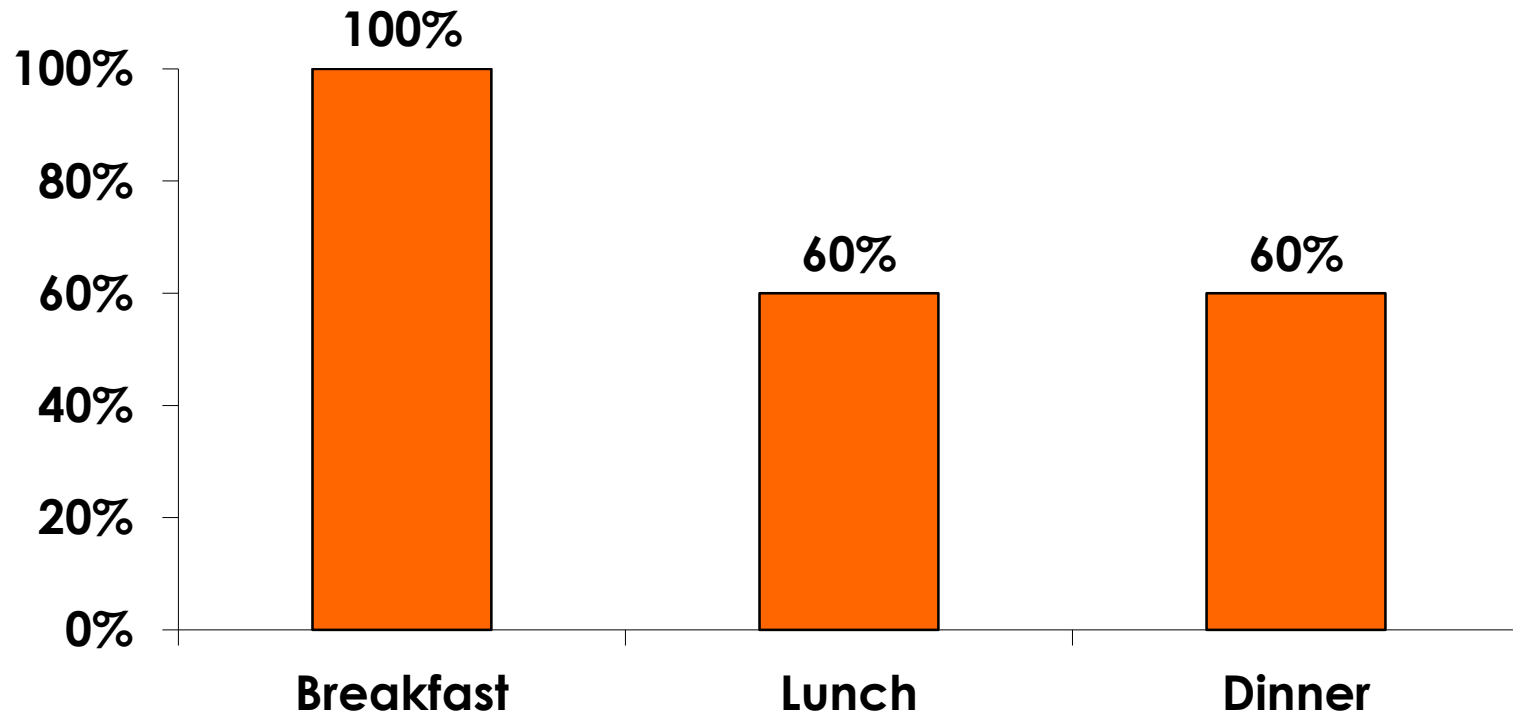


Mean=\$2,519.13 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

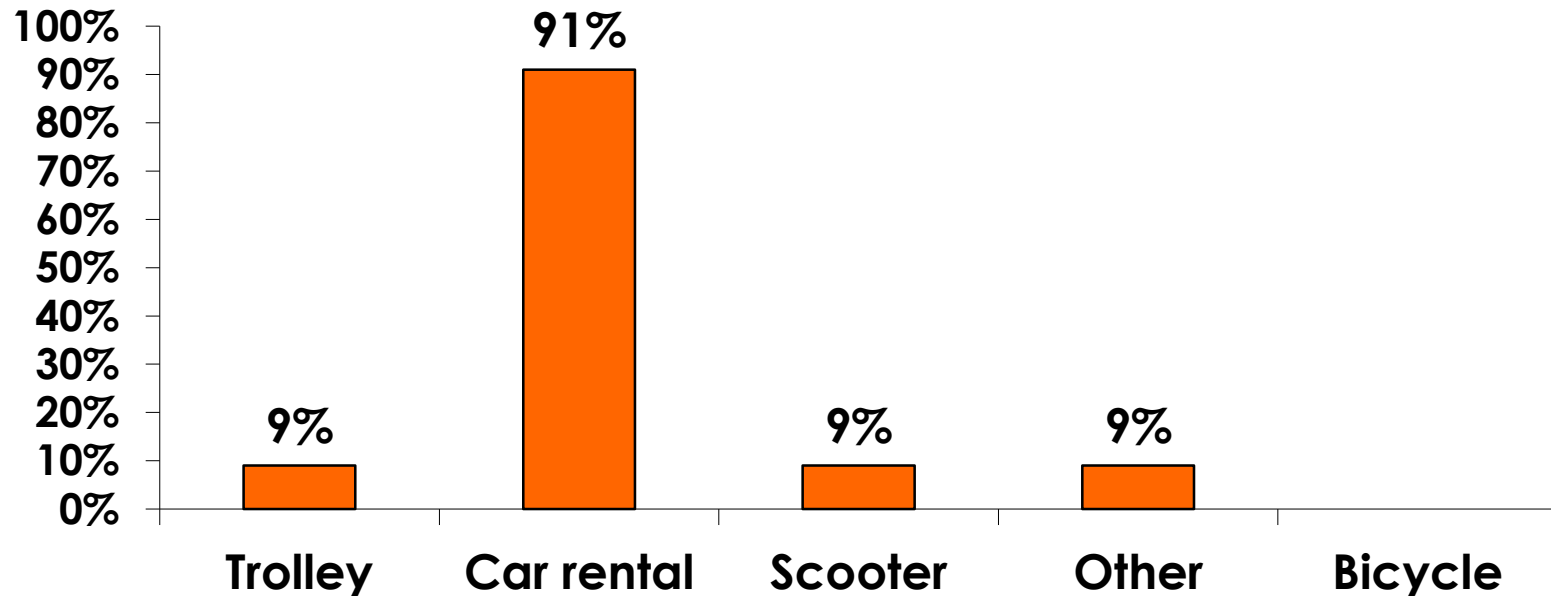
N=5



Mean=\$1,173.57 per travel party

PREPAID GROUND TRANSPORTATION

n=11



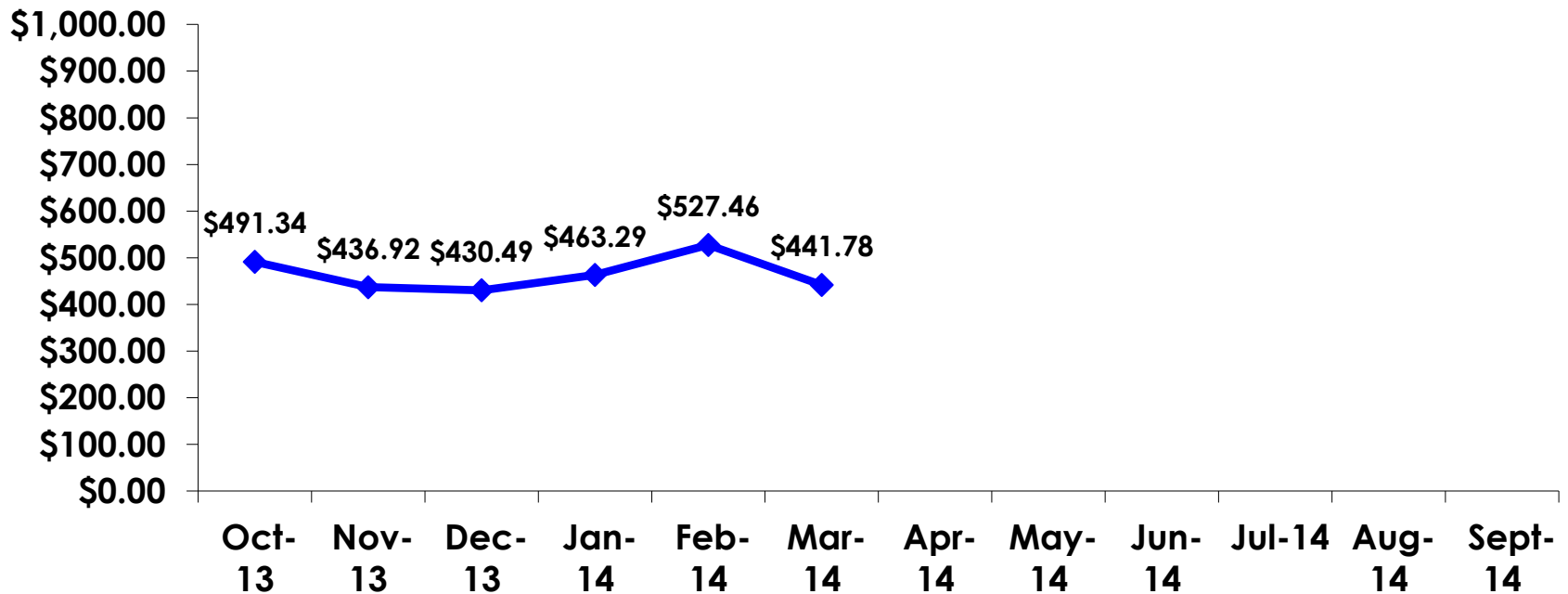
Mean=\$148.49 per travel party

On-Island Expenditures

- \$895.44 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,200 = Maximum (highest amount recorded for the entire sample)
- \$441.78 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

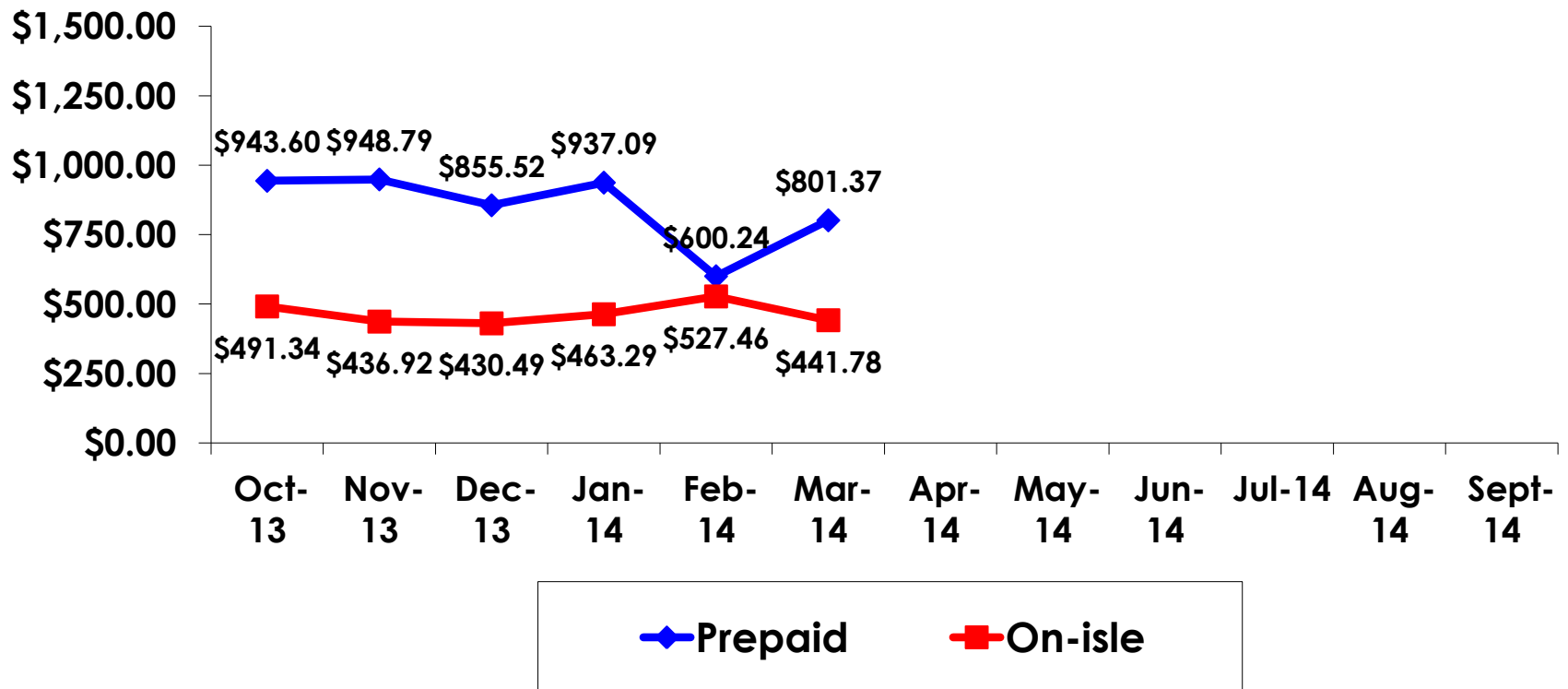


YTD = \$465.19

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$847.65

On-Isle YTD = \$465.19



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	\$441.78	\$407.79	\$475.58	.	\$475.74	\$327.21	\$673.00	\$249.88	\$535.90	\$404.31	\$781.67
	Median	\$300	\$325	\$300	.	\$400	\$250	\$240	\$288	\$323	\$211	\$500
	Minimum	\$0	\$0	\$0	.	\$0	\$0	\$125	\$0	\$0	\$0	\$0
	Maximum	\$3,000	\$1,650	\$3,000	.	\$1,550	\$1,147	\$1,650	\$700	\$3,000	\$2,500	\$2,720

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$42.34	\$54.66	\$30.09	\$0.00	\$48.20	\$29.53	\$76.43
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.46	\$28.67	\$26.25	\$13.75	\$29.63	\$27.46	\$17.14
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B RESTRNT	Mean	\$60.43	\$64.29	\$56.59	\$76.88	\$74.30	\$43.16	\$53.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$15
OPT TOUR	Mean	\$76.13	\$76.23	\$76.02	\$77.19	\$76.51	\$72.33	\$50.71
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$215.98	\$217.67	\$214.29	\$74.69	\$236.36	\$221.03	\$141.43
	Median	\$0	\$0	\$0	\$0	\$0	\$100	\$0
GIFT- OTHER	Mean	\$108.69	\$102.95	\$114.40	\$30.31	\$118.77	\$112.29	\$73.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TRANS	Mean	\$43.77	\$47.35	\$40.21	\$56.94	\$40.12	\$42.13	\$73.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$321.41	\$283.78	\$358.83	\$159.25	\$337.53	\$300.41	\$635.00
	Median	\$0	\$0	\$15	\$0	\$5	\$0	\$350
TOTAL	Mean	\$895.44	\$877.55	\$913.22	\$471.00	\$958.15	\$852.84	\$1,121.43
	Median	\$650	\$700	\$600	\$355	\$700	\$600	\$1,000

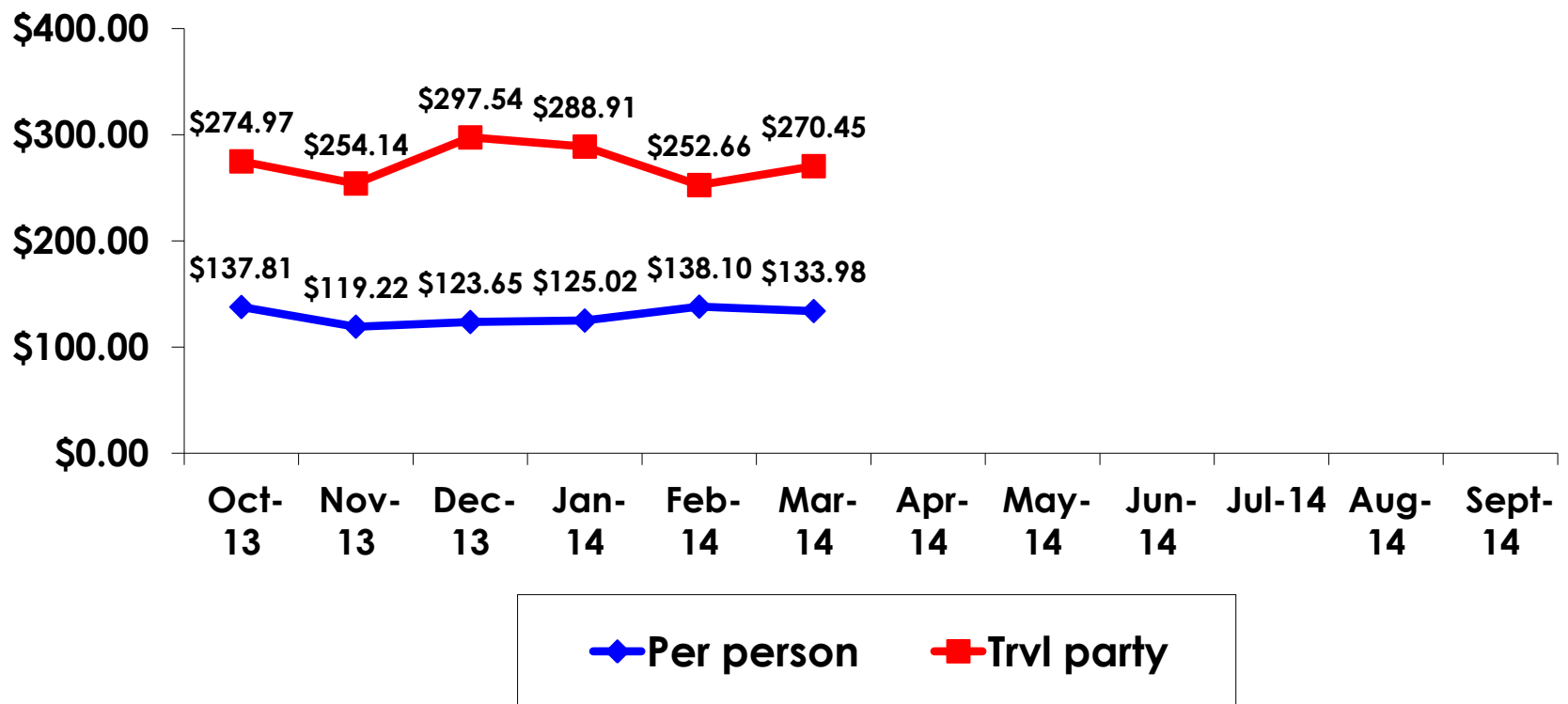
On-Island Expenditures

First time vs. Repeat

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$42.34	\$41.52	\$46.85
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$27.46	\$29.05	\$18.70
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$60.43	\$58.29	\$72.22
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$76.13	\$81.09	\$48.80
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$215.98	\$206.15	\$270.00
	Median	\$0	\$0	\$25
GIFT- OTHER	Mean	\$108.69	\$111.27	\$94.52
	Median	\$0	\$0	\$0
TRANS	Mean	\$43.77	\$40.51	\$61.69
	Median	\$0	\$0	\$15
OTHER	Mean	\$321.41	\$292.58	\$480.00
	Median	\$0	\$0	\$0
TOTAL	Mean	\$895.44	\$859.56	\$1,092.78
	Median	\$650	\$600	\$910

ON-ISLE EXPENDITURES – By Day

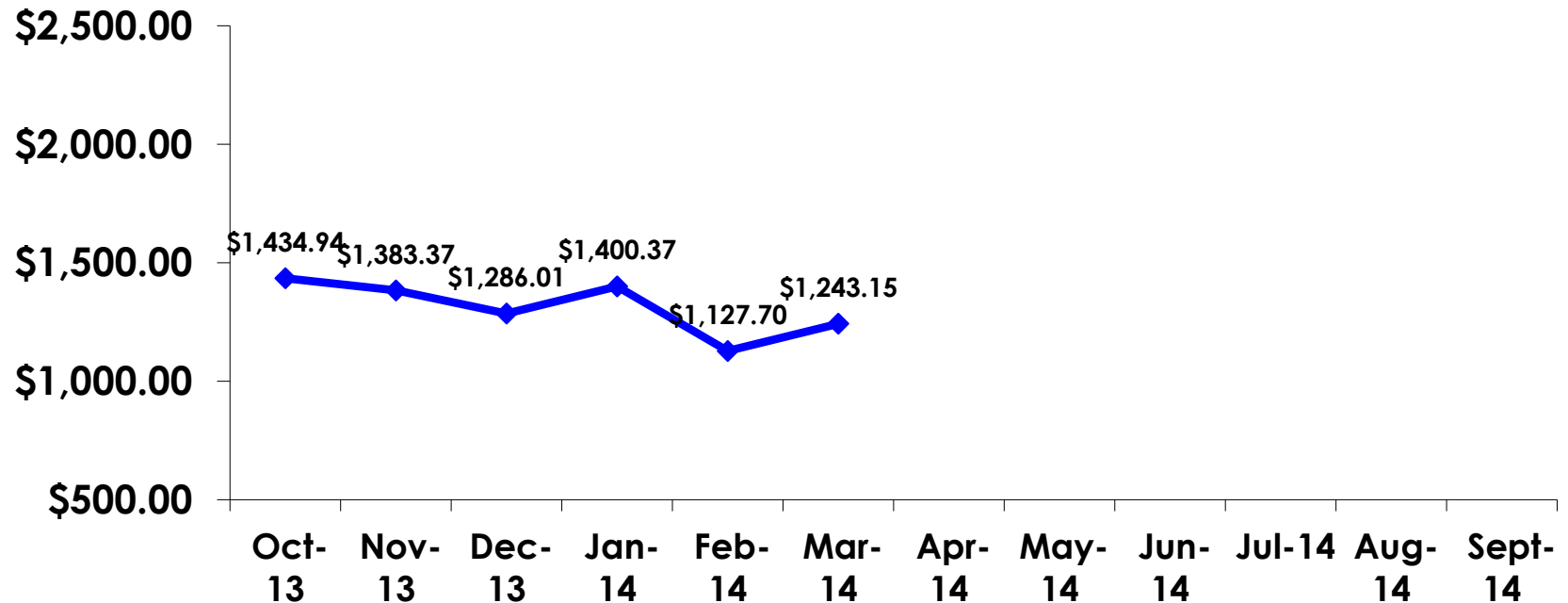
YTD Per Person = \$129.61 YTD Travel Party = \$273.18



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,243.15 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,649 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



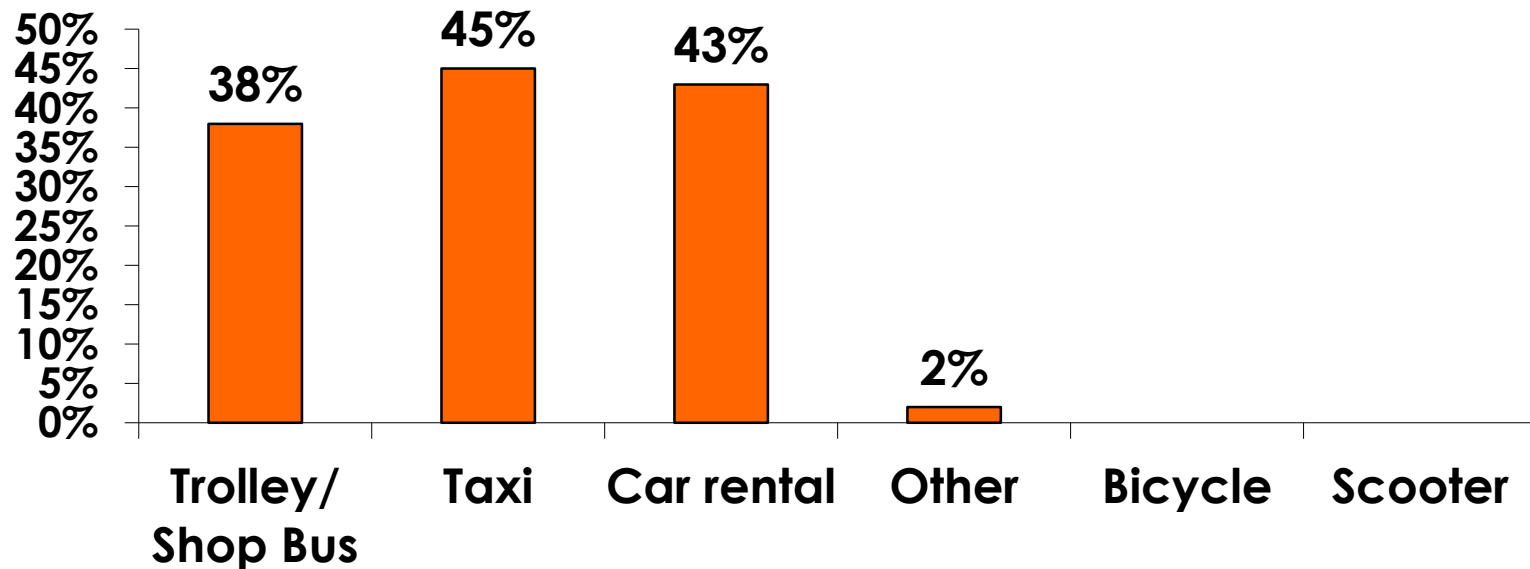
YTD=\$1,312.48

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$42.34
Food & beverage in fast food restaurant/convenience store	\$27.46
Food & beverage at restaurants or drinking establishments outside a hotel	\$60.43
Optional tours and activities	\$76.13
Gifts/ souvenirs for yourself/companions	\$215.98
Gifts/ souvenirs for friends/family at home	\$108.69
Local transportation	\$43.77
Other expenses not covered	\$321.41
Average Total	\$895.44

Local Transportation

n=148



Mean=\$43.77 per travel party

Guam Airport Expenditures

- \$56.98 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

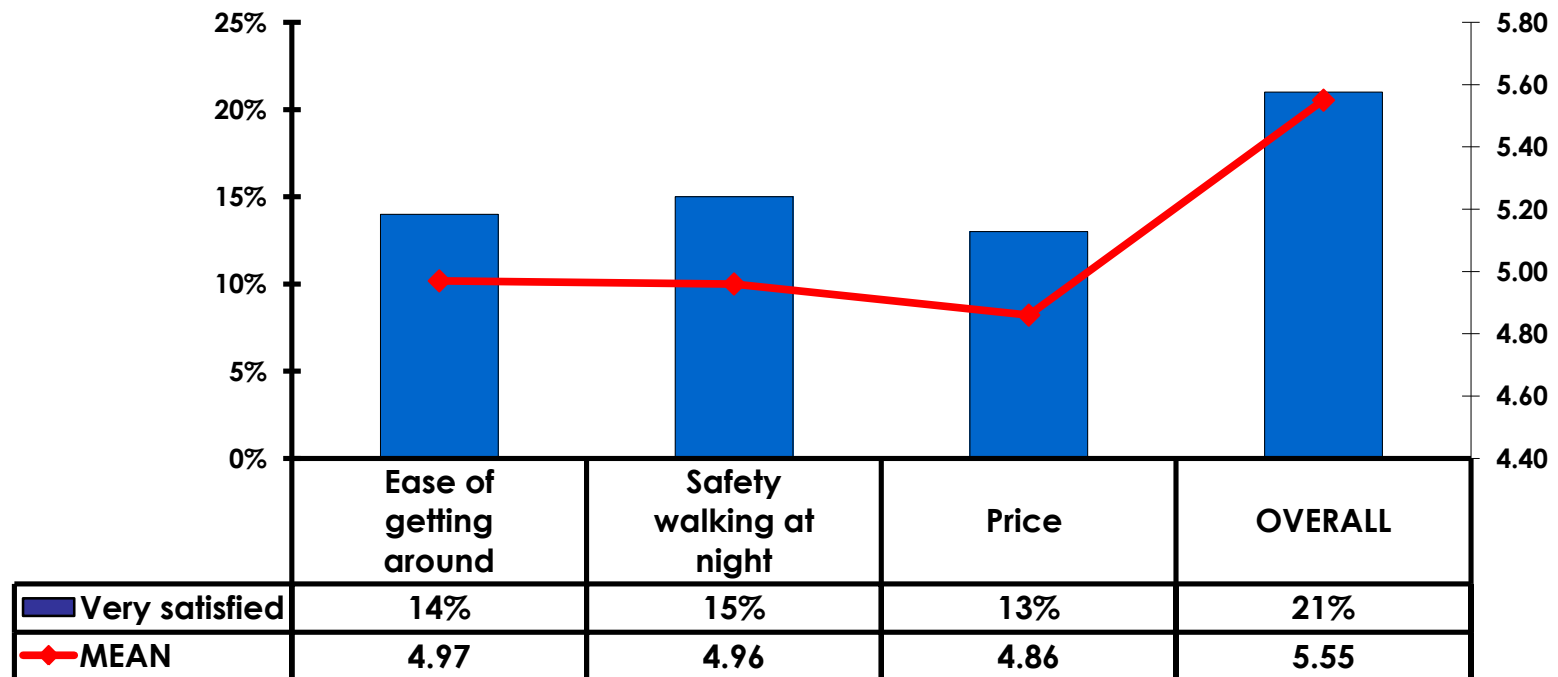
	MEAN \$
Food & Beverages	\$4.60
Gifts/Souvenirs Self	\$32.72
Gifts/Souvenirs Others	\$19.66
Total	\$56.98

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

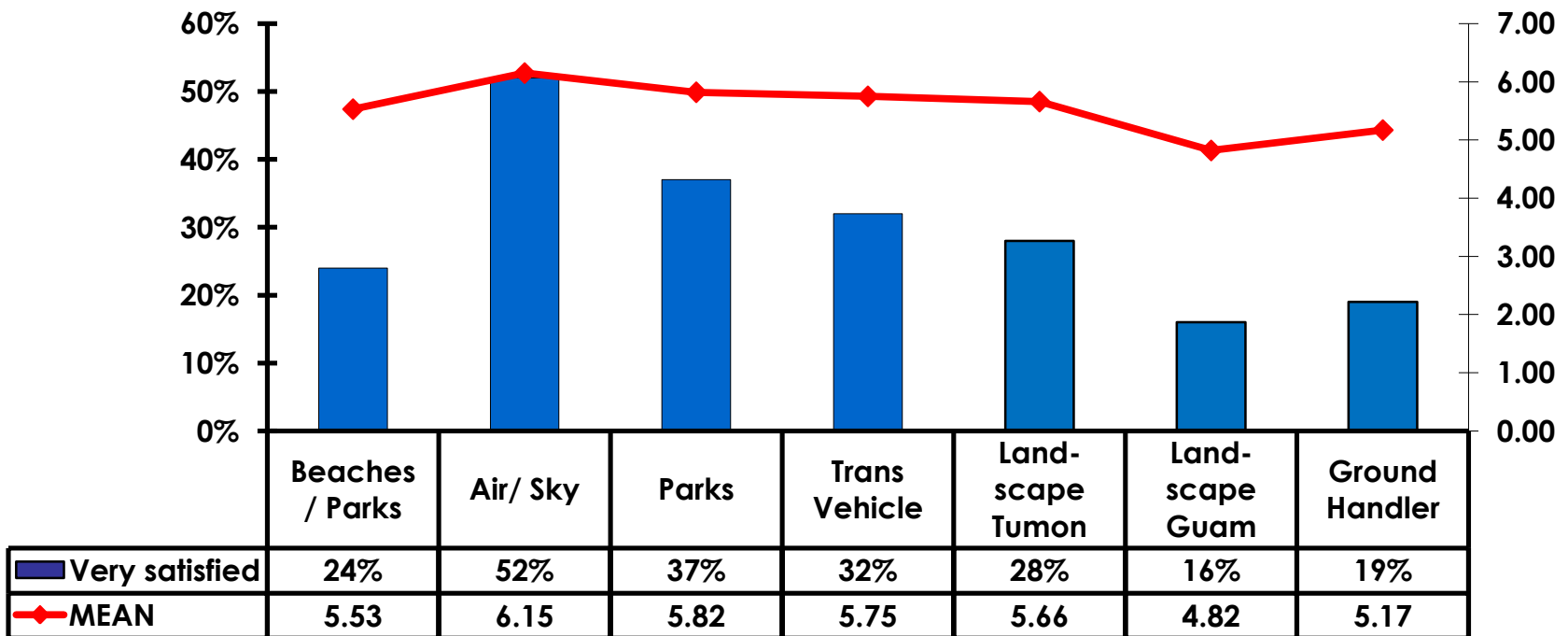
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

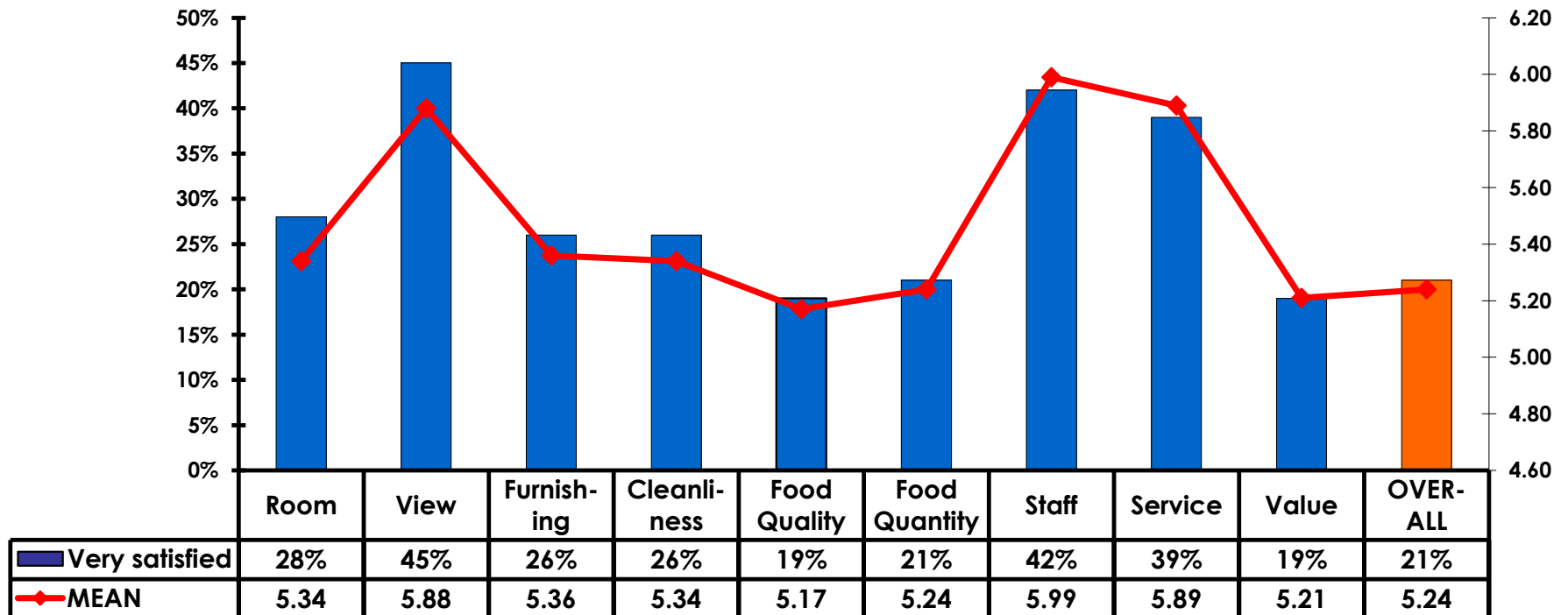
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

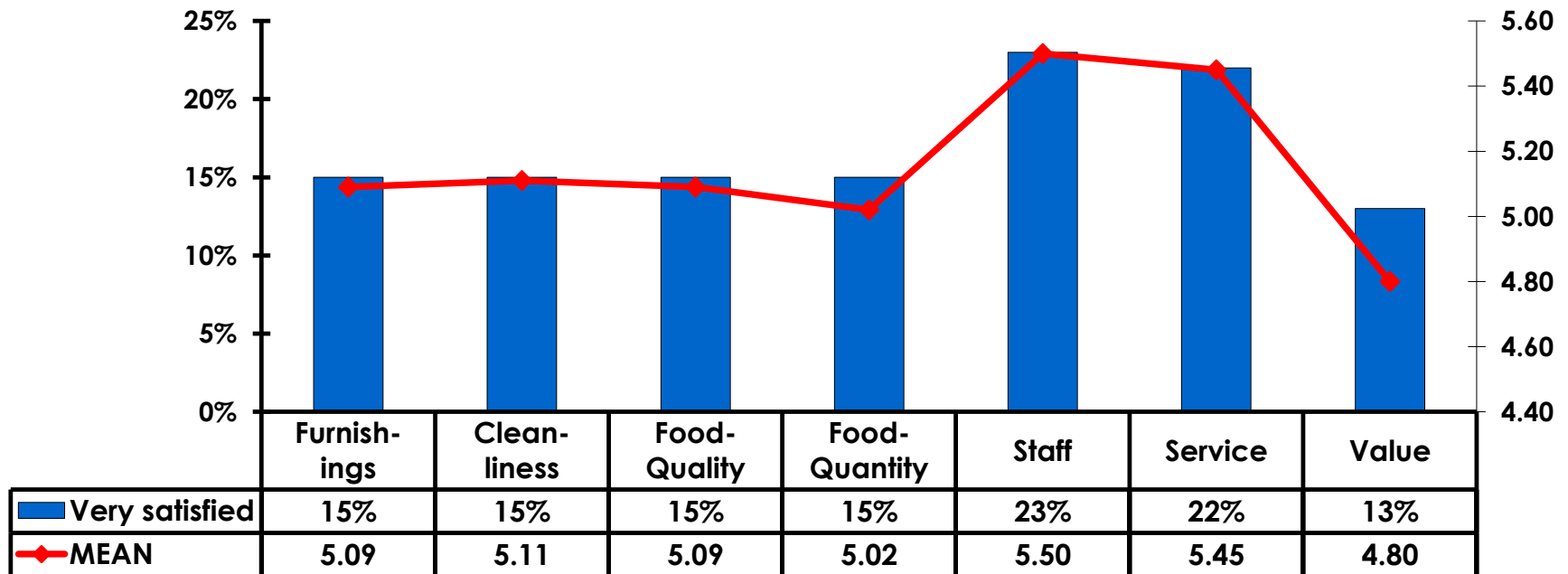
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

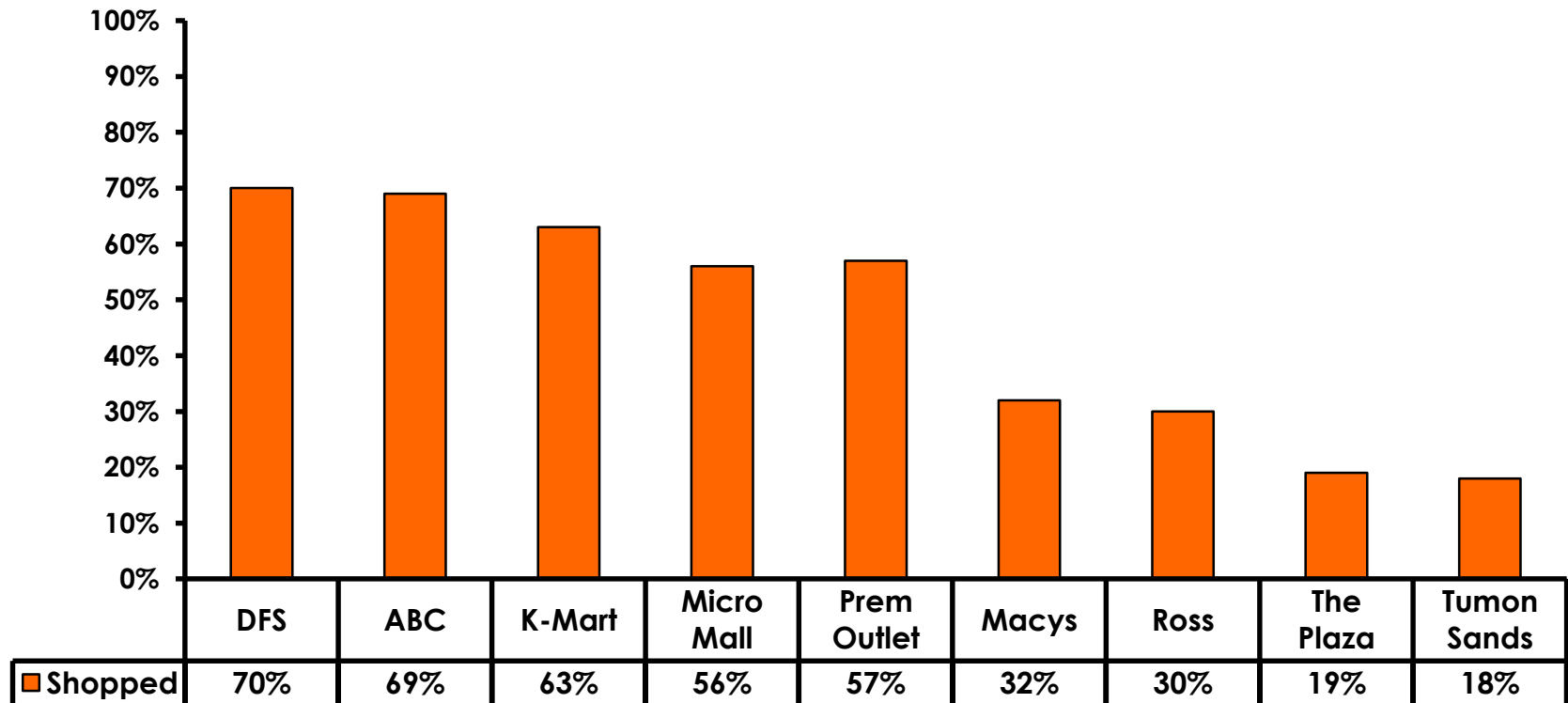
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

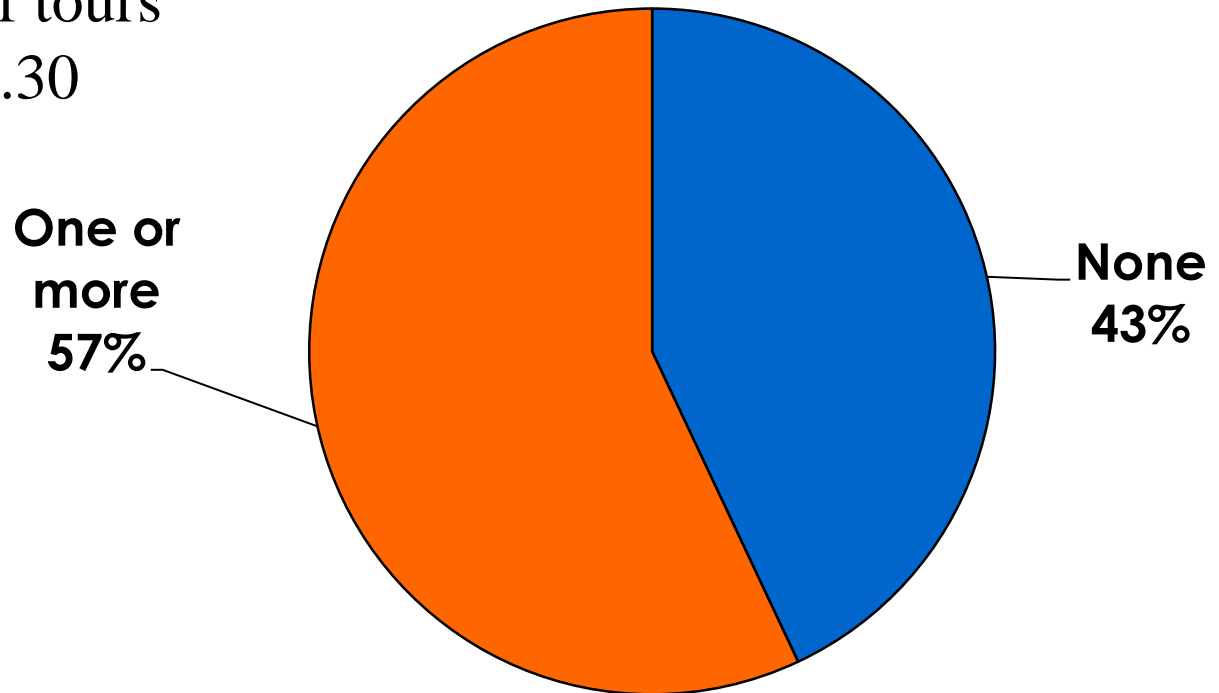
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 51%
Score of 4 to 5 = 38%	Score of 4 to 5 = 40%
Score 1 to 3 = 7%	Score 1 to 3 = 9%
MEAN = 5.40	MEAN = 5.26

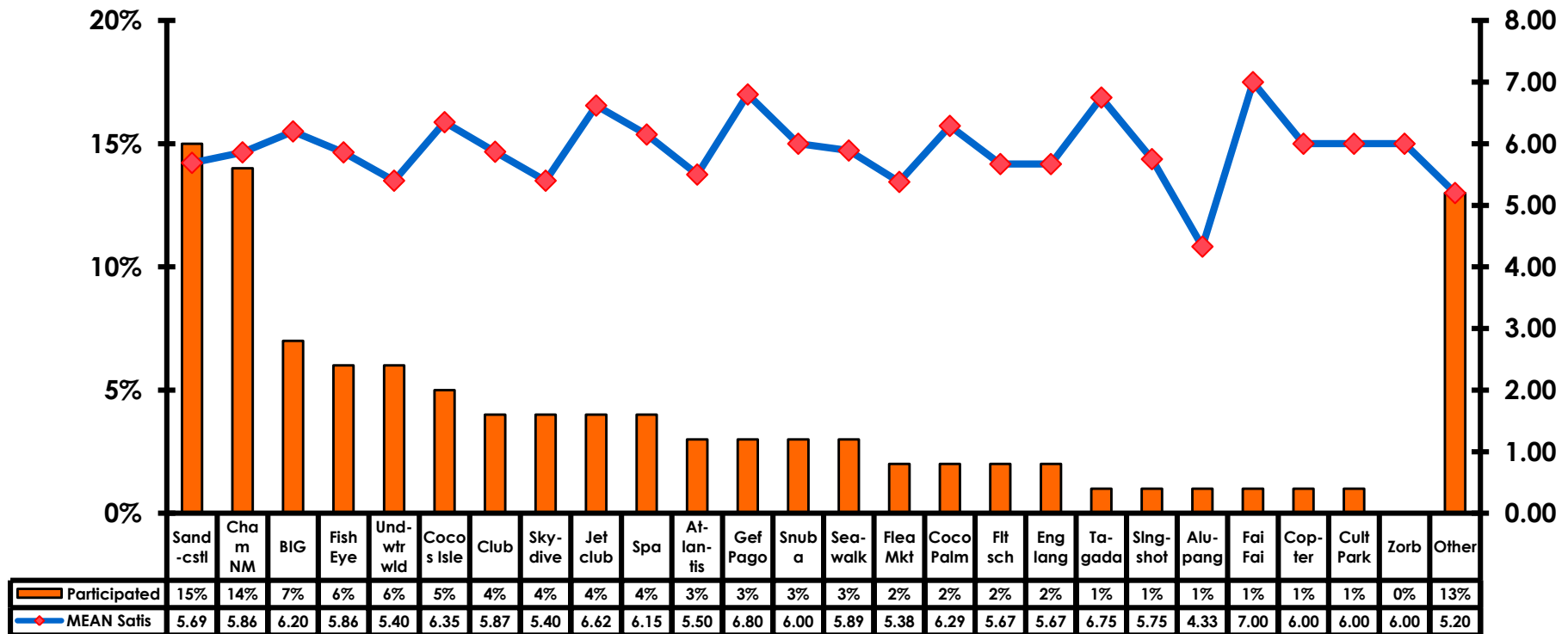
Optional Tour Participation

- Average number of tours participated in is 1.30



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 = 41%	Score of 6 to 7 = 36%
Score of 4 to 5 = 53%	Score of 4 to 5 = 53%
Score 1 to 3 = 7%	Score 1 to 3 = 12%
MEAN = 5.10	MEAN = 4.86

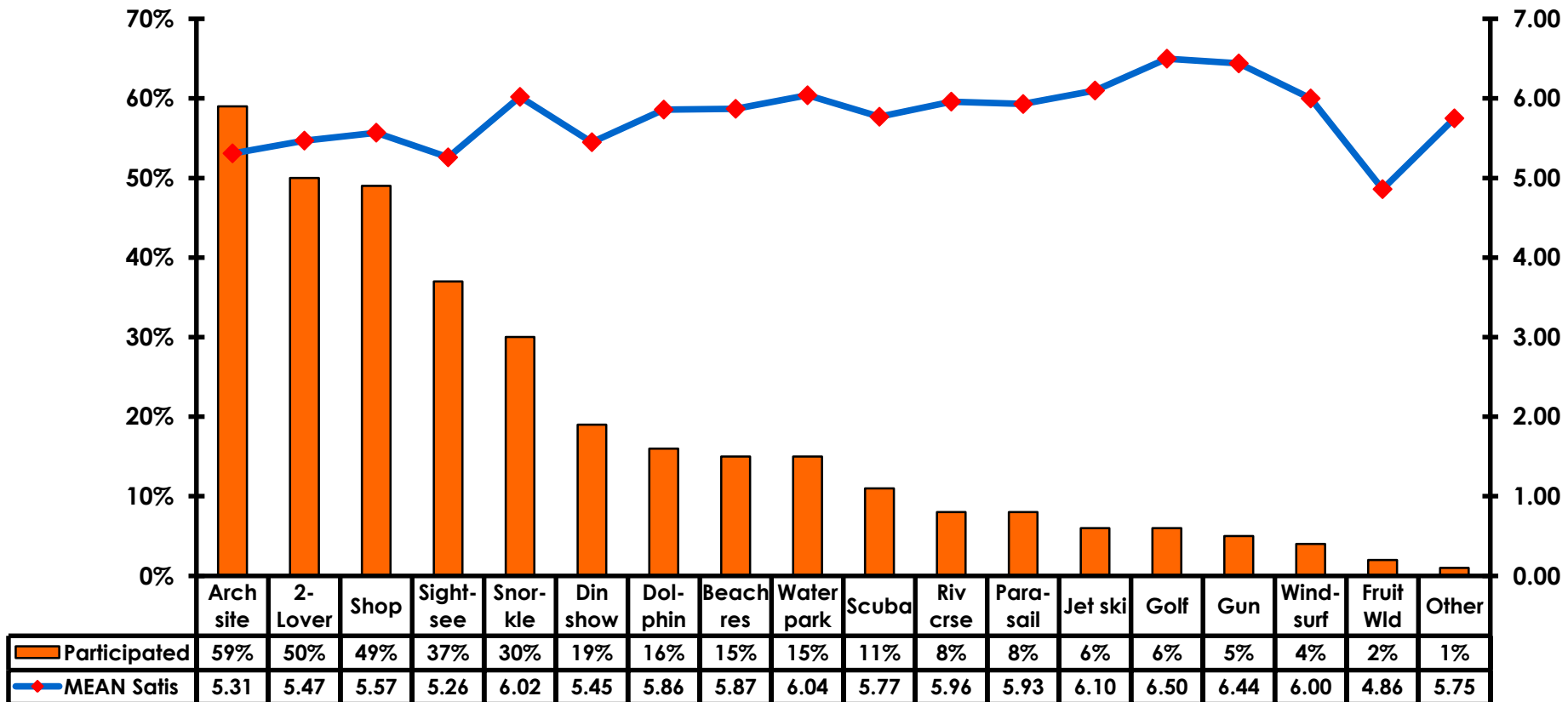
Night Tours Satisfaction

7pt Rating Scale

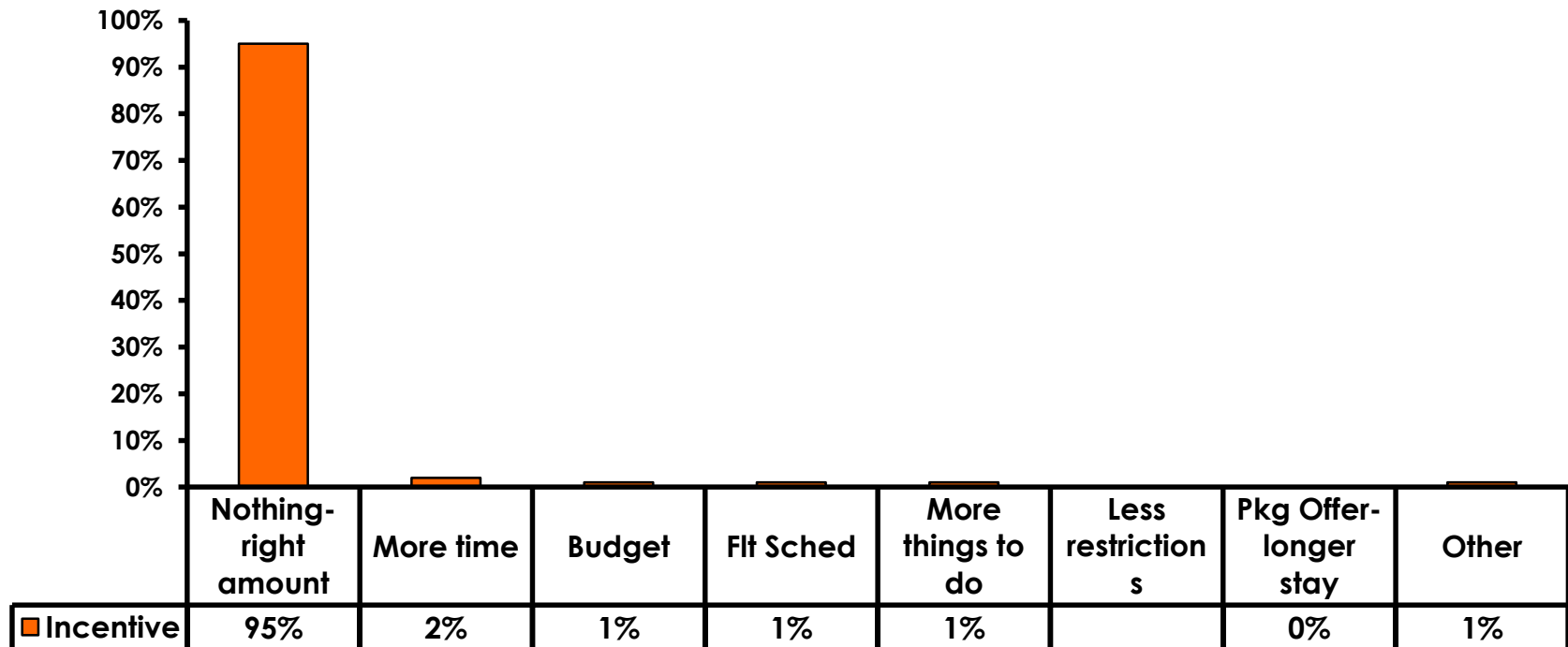
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 21%	Score of 6 to 7 = 22%
Score of 4 to 5 = 64%	Score of 4 to 5 = 61%
Score 1 to 3 = 14%	Score 1 to 3 = 17%
MEAN = 4.52	MEAN = 4.48

Satisfaction with Other Activities



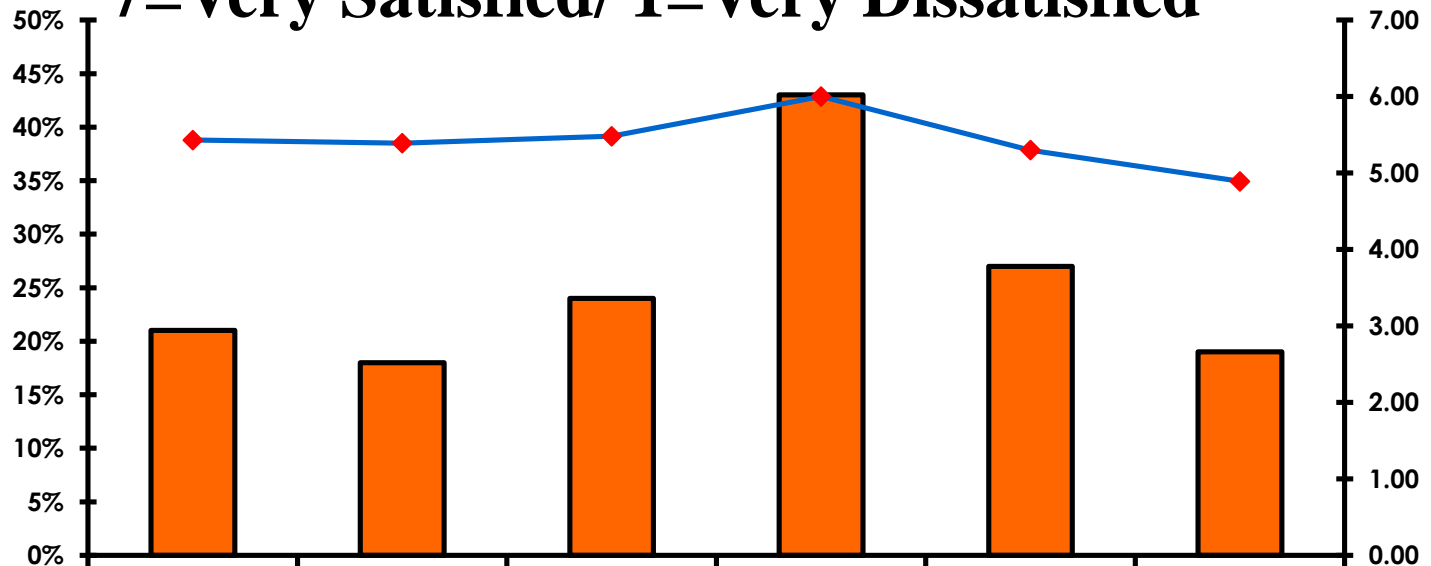
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

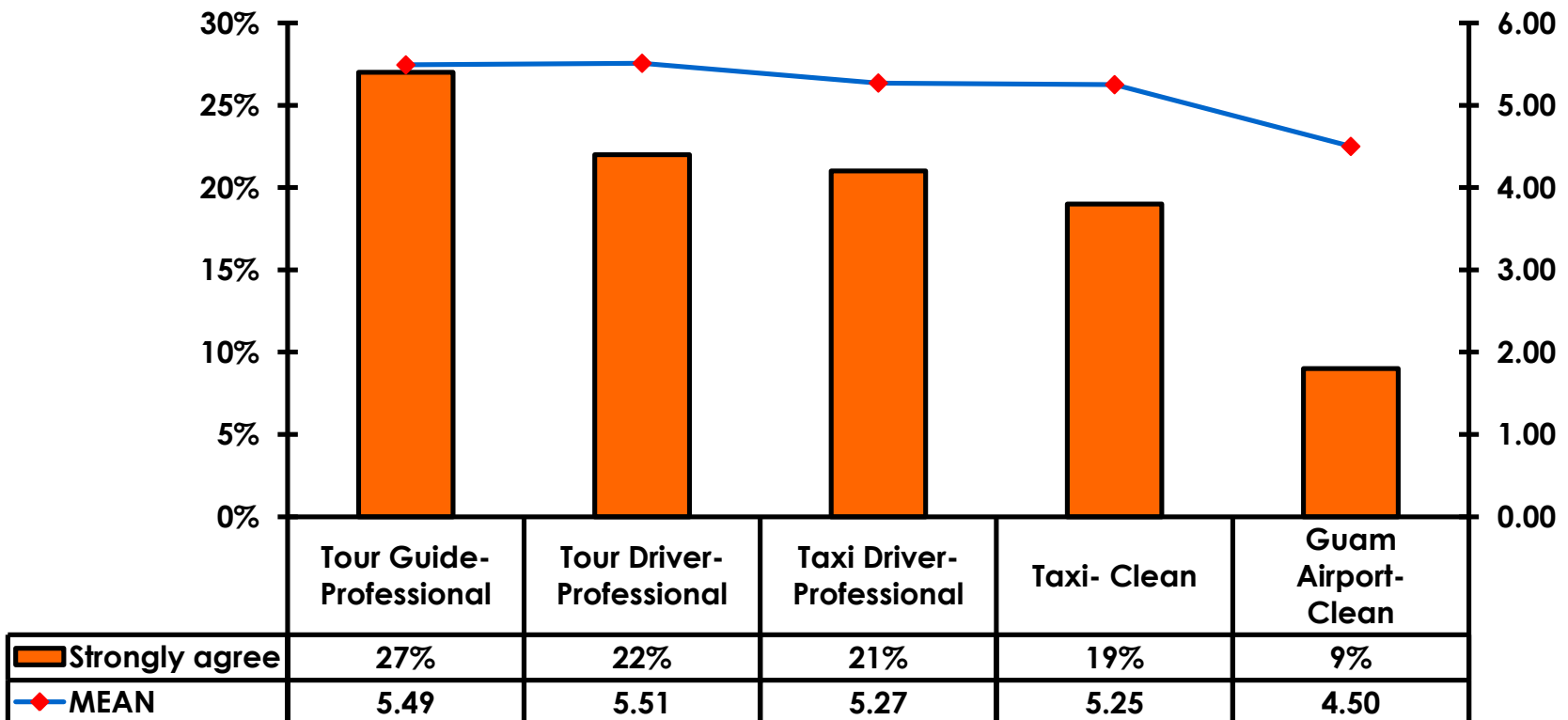


 Strongly agree	21%	18%	24%	43%	27%	19%
 MEAN	5.43	5.39	5.48	6.00	5.30	4.89

On-Island Perceptions

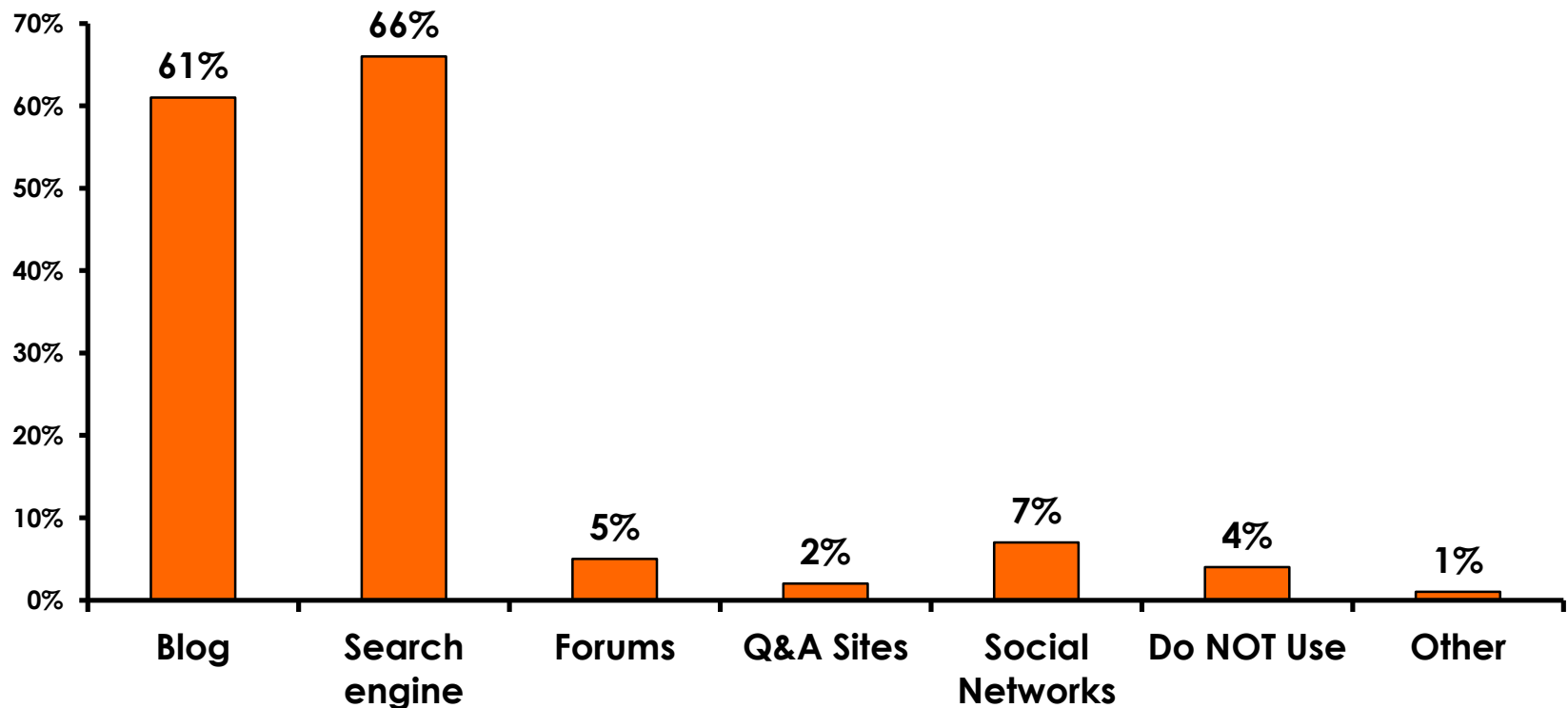
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



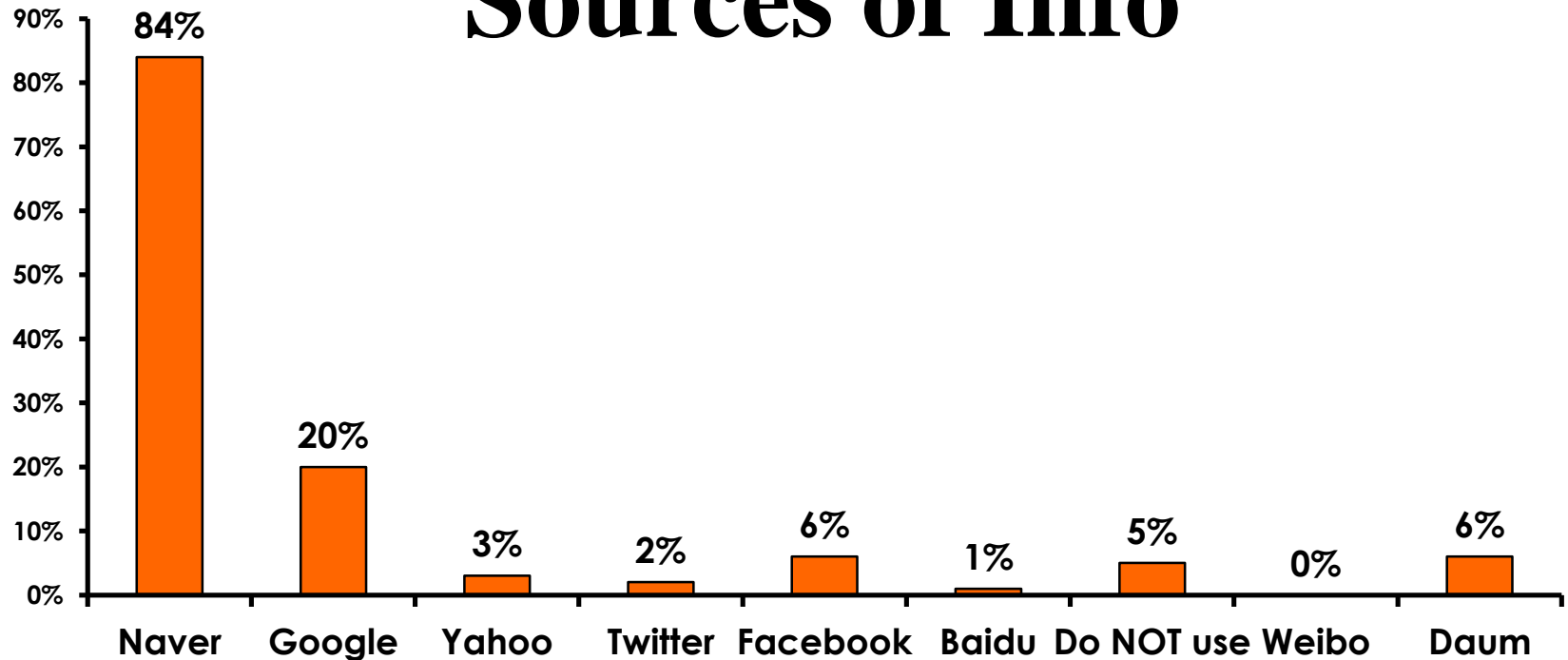
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

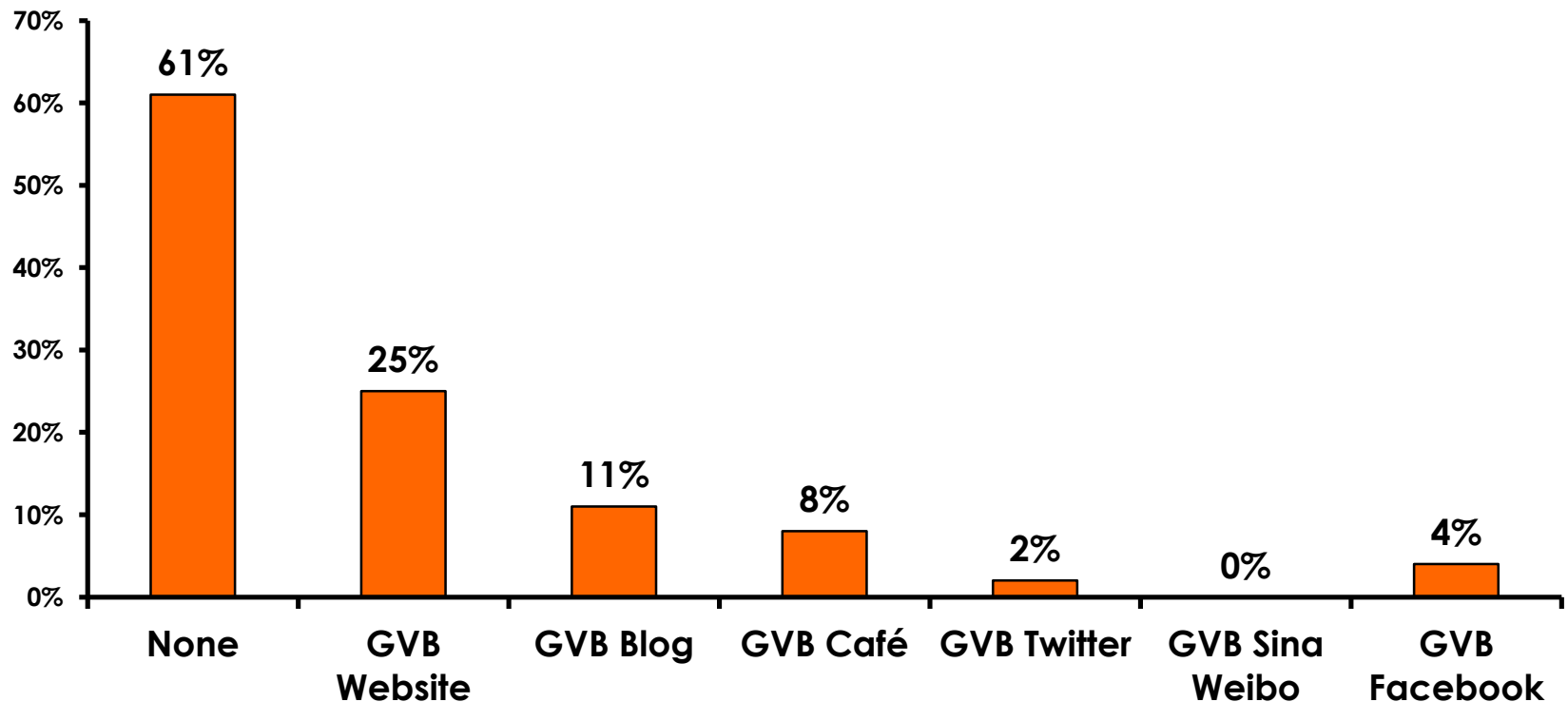


Internet- Things To Do

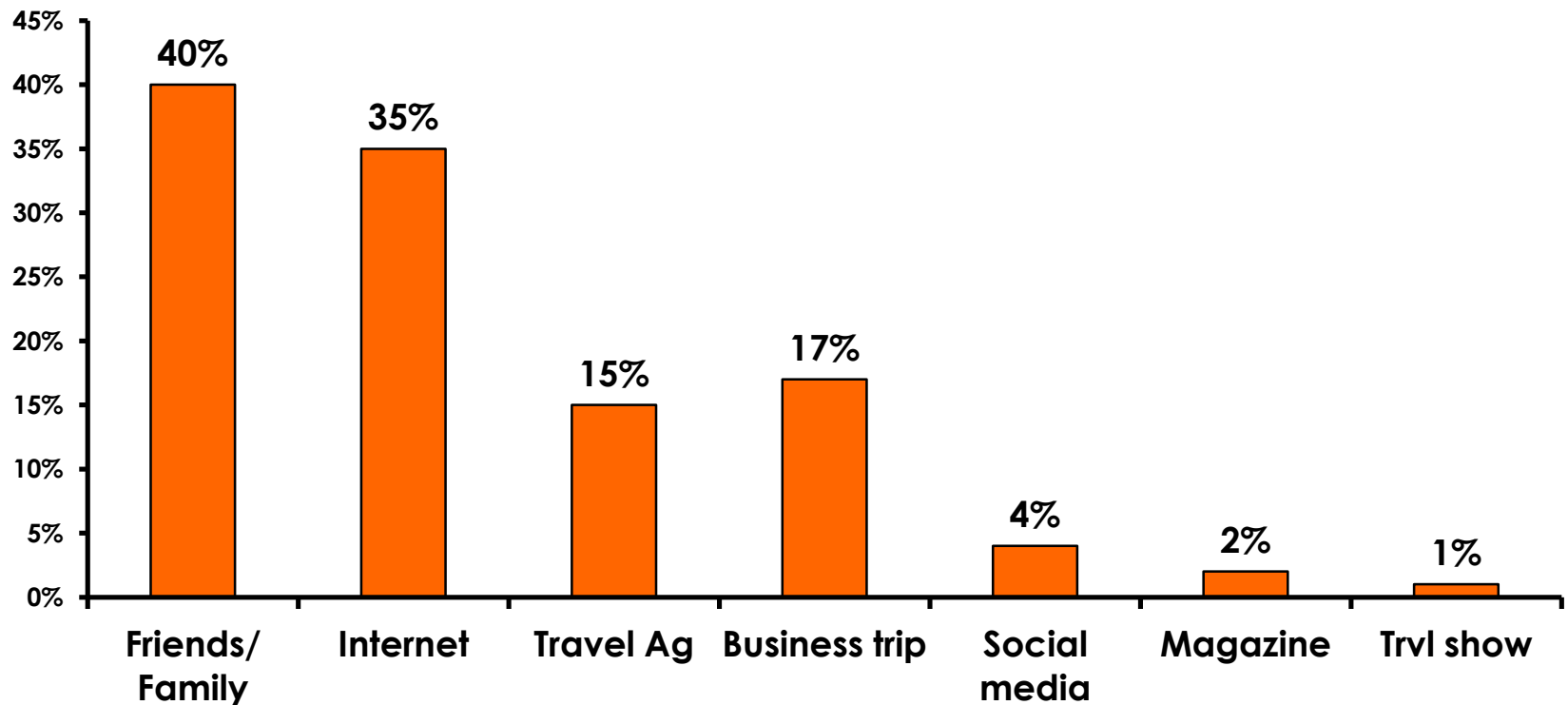
Sources of Info



Internet- GVB Sources

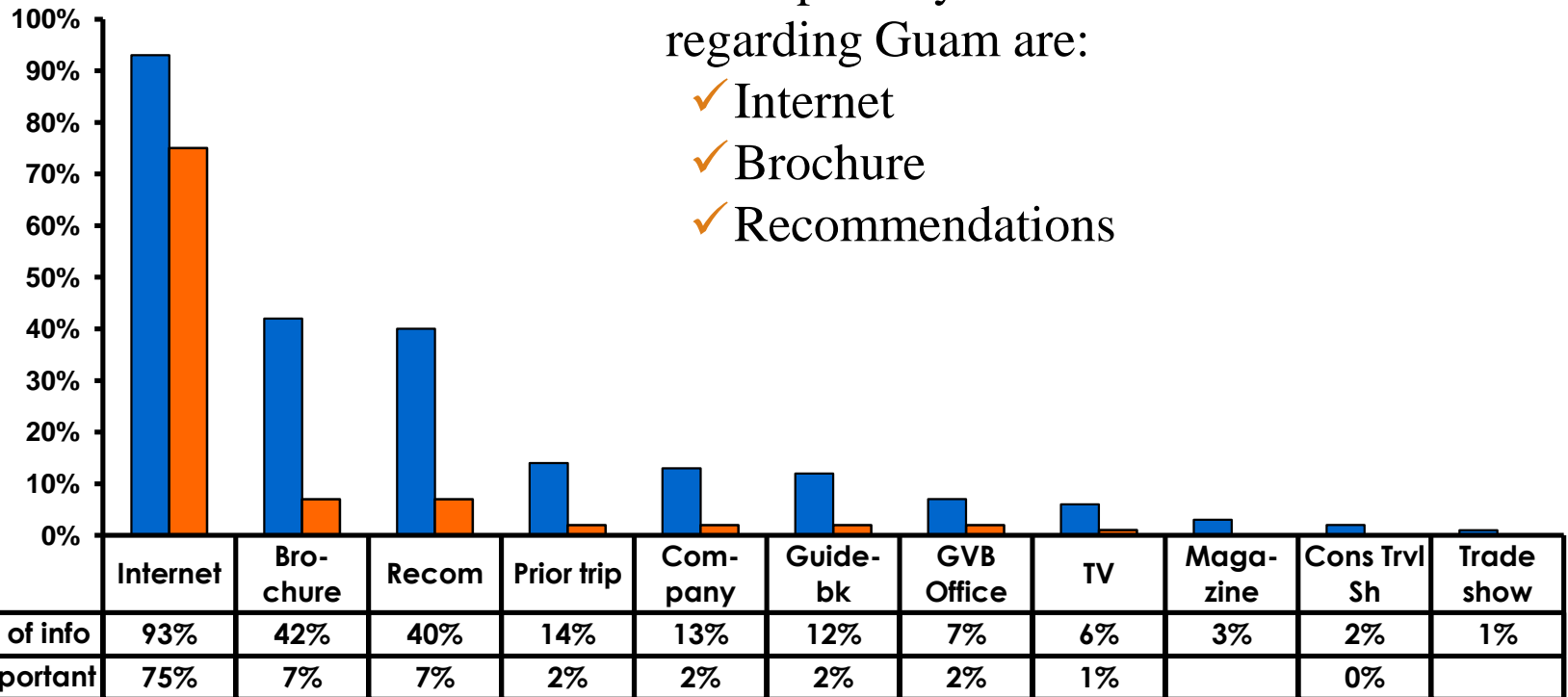


Travel Motivation- Info Sources



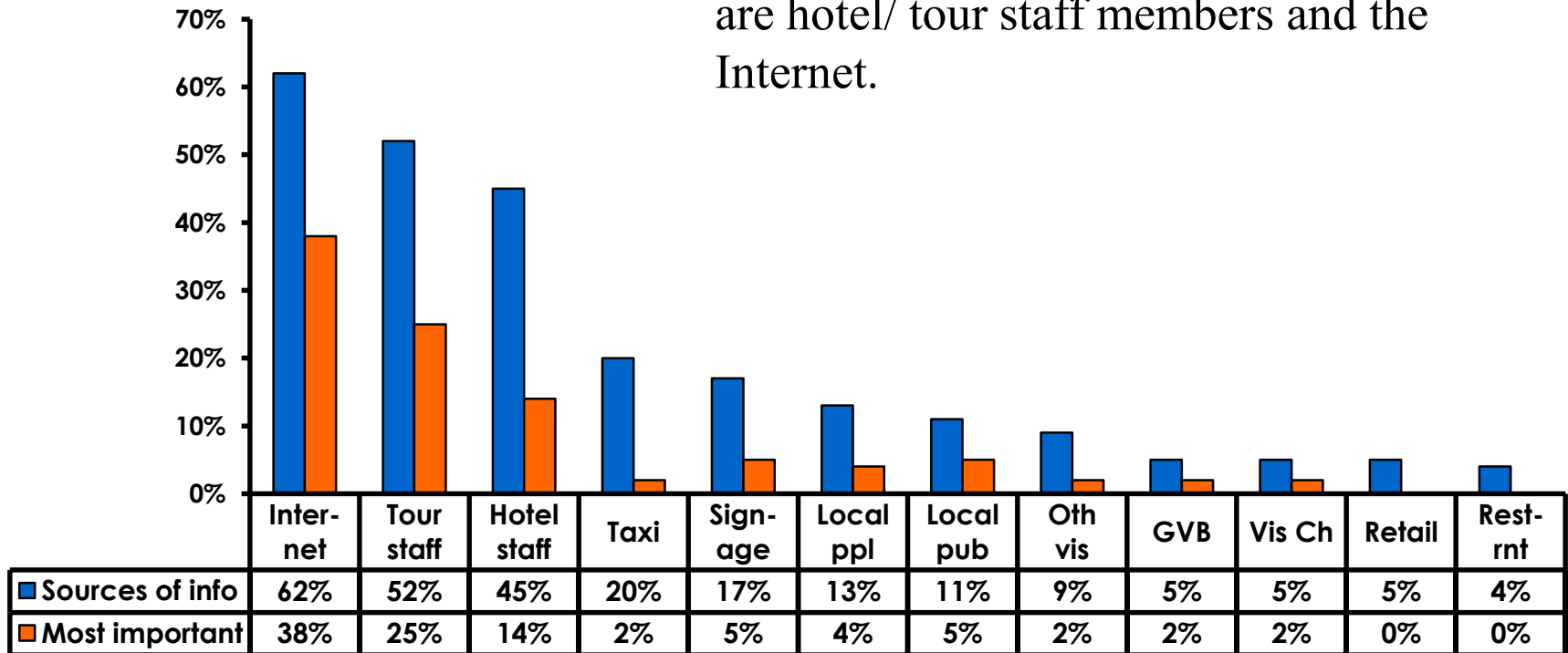
Sources of Information Pre-arrival

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



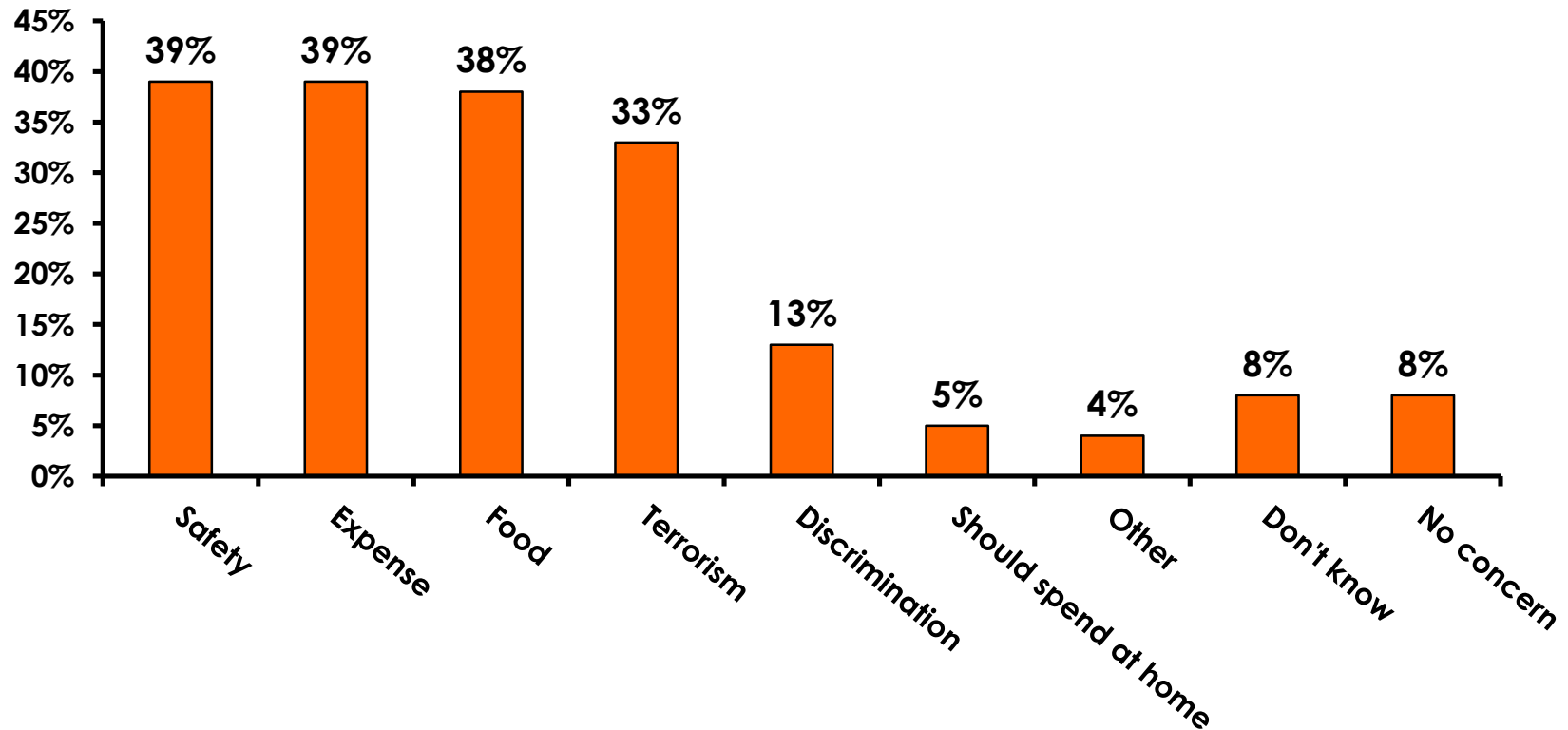
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

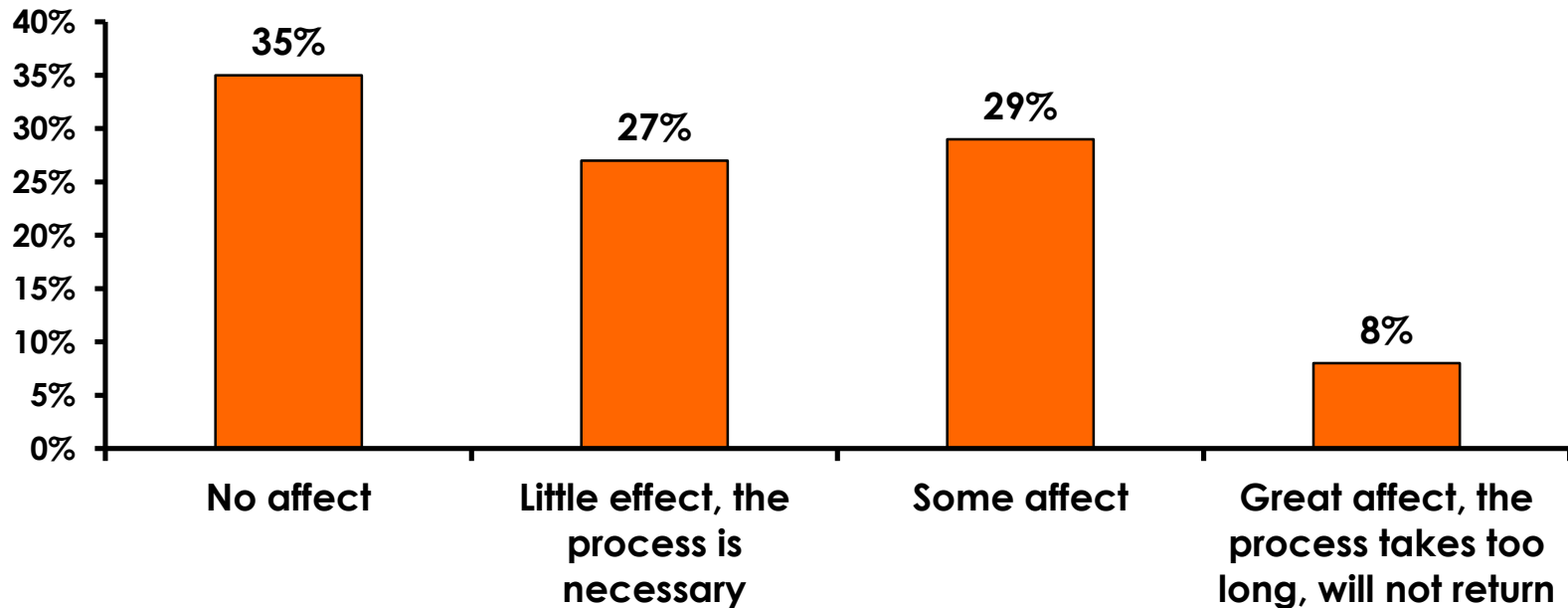
Concerns about travel outside of Korea - Overall



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	39%	38%	34%	47%	43%	14%	43%	30%	32%	43%	57%	51%	10%	
	Expense	39%	31%	39%	43%	21%	43%	35%	48%	40%	43%	31%	43%	24%	
	Food	38%	38%	40%	36%	29%	43%	52%	38%	44%	39%	33%	35%	38%	
	Terrorism	33%	50%	33%	32%	21%	43%	39%	23%	43%	33%	35%	34%	24%	
	Discrimination against Koreans	13%	6%	15%	11%	7%		9%	13%	17%	17%	16%	6%	14%	
	Don't know	8%	19%	7%	8%	7%	14%		10%	10%	9%	4%	1%	14%	
	No concerns	8%	13%	8%	9%	7%		4%	13%	5%	6%	8%	13%	10%	
	Should spend at home	5%	6%	7%	3%		29%	9%	8%	8%	2%	4%	4%	5%	
	Other	4%		5%	4%			4%	5%	3%	6%	6%	3%	5%	
	Total	Count	350	16	176	133	14	7	23	40	63	54	49	77	21

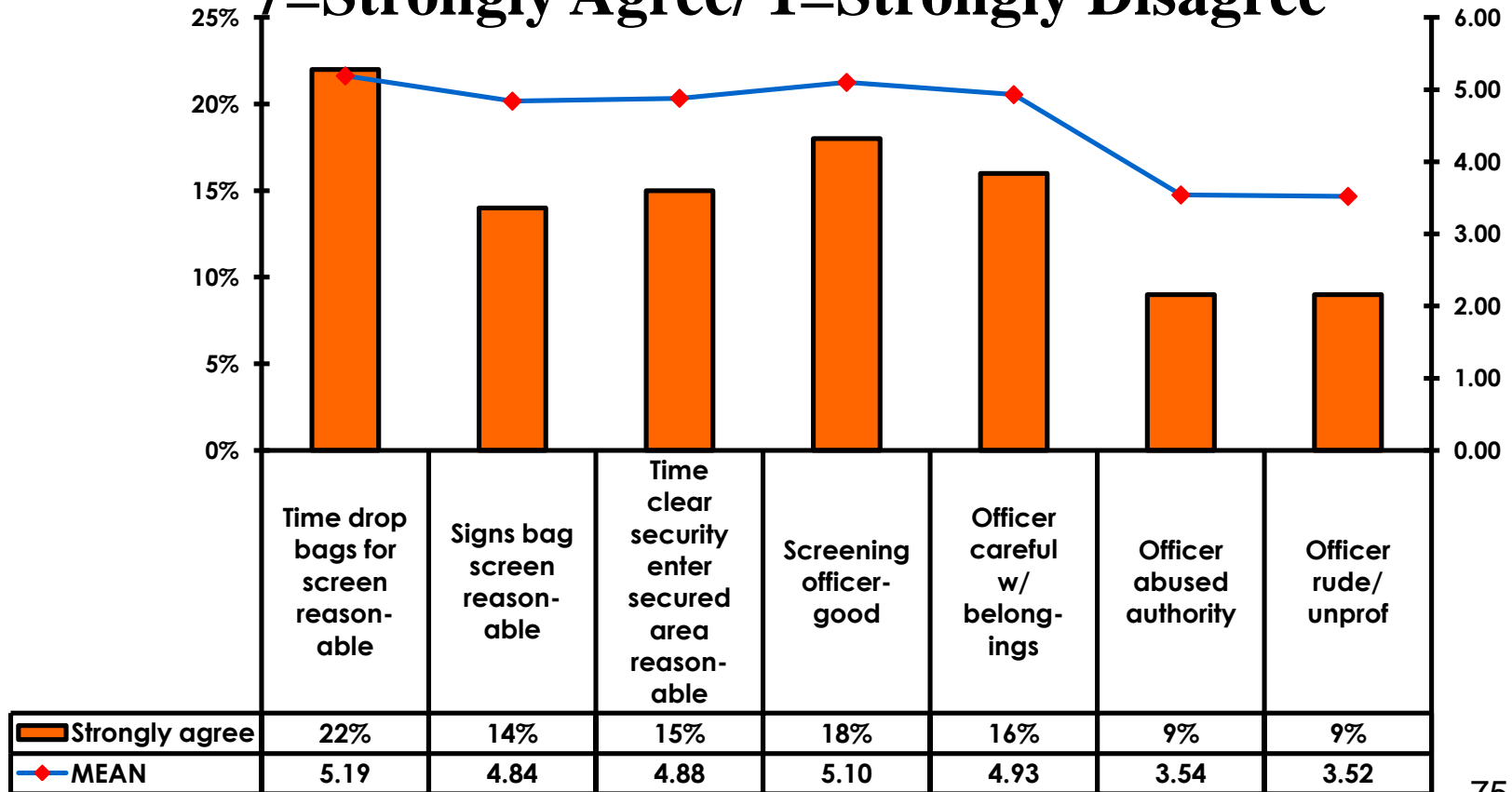
Security Screening/ Immigration Process at Guam International Airport



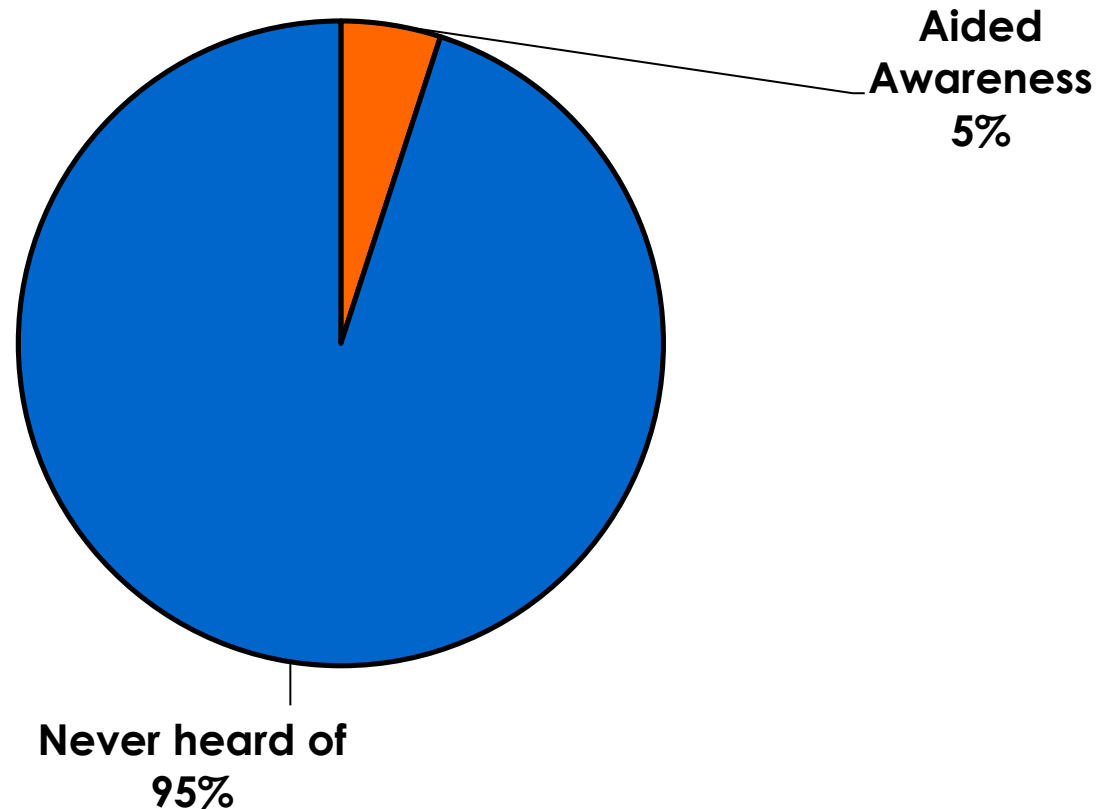
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=19

