



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **JULY 2011**



**Prepared by: QMark Research**

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# Background & Methodology

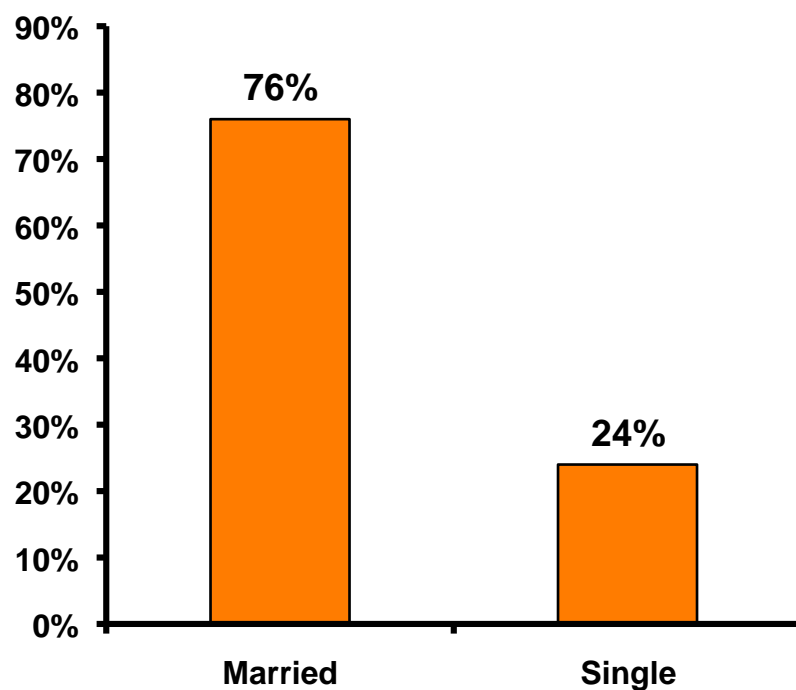
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **354** departing Korean 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 **354** is +/- 5.2 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 +/- 5.2 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 Korean marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

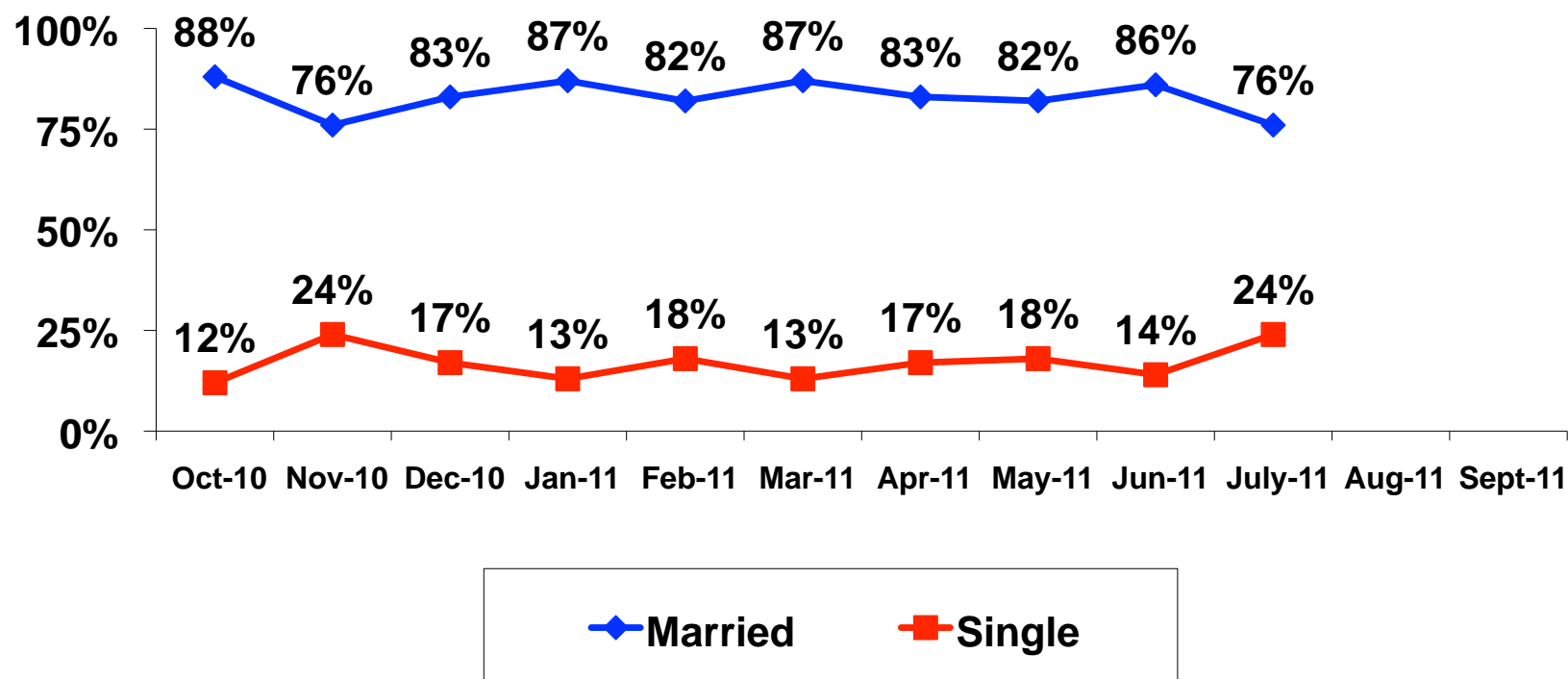
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

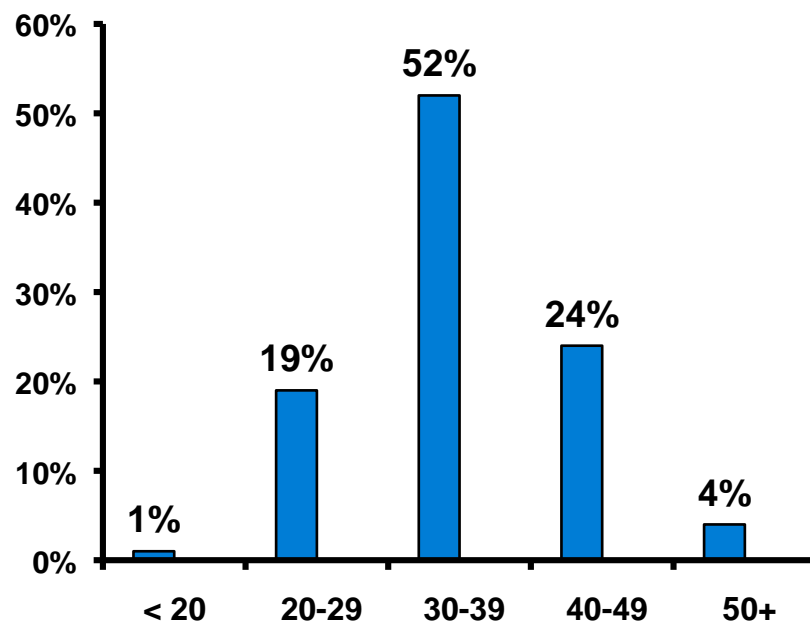


- A majority of visitors are married.

# Marital Status

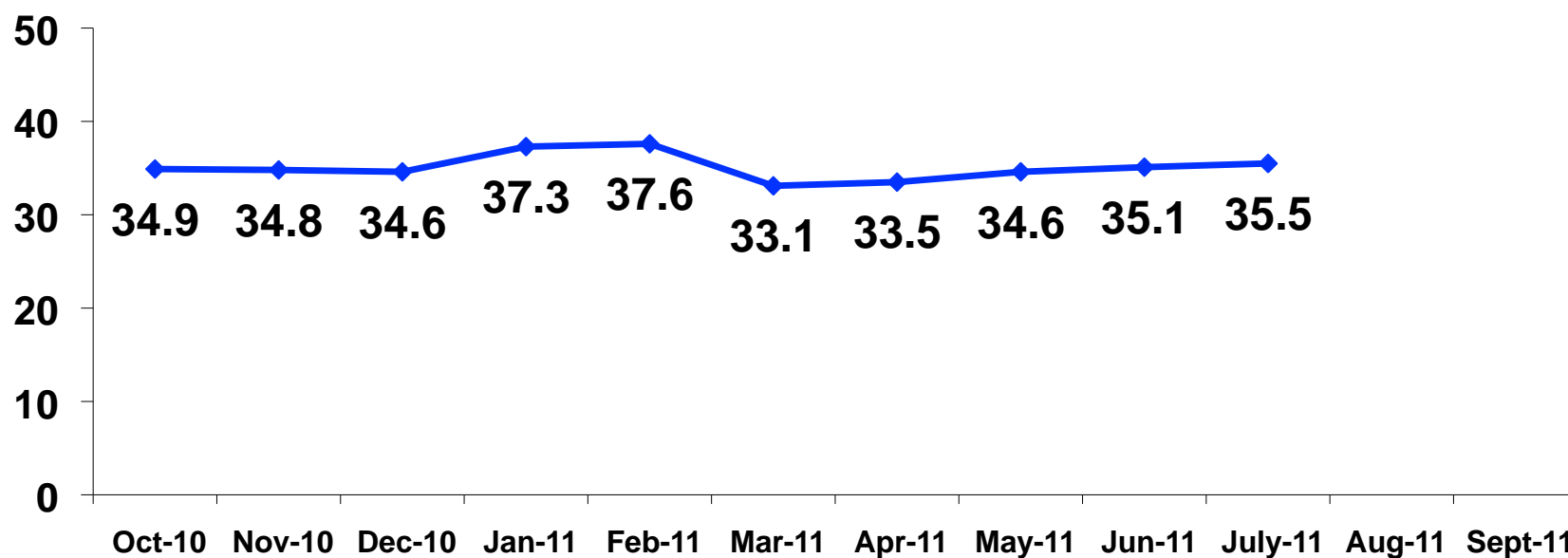


# Age - Overall



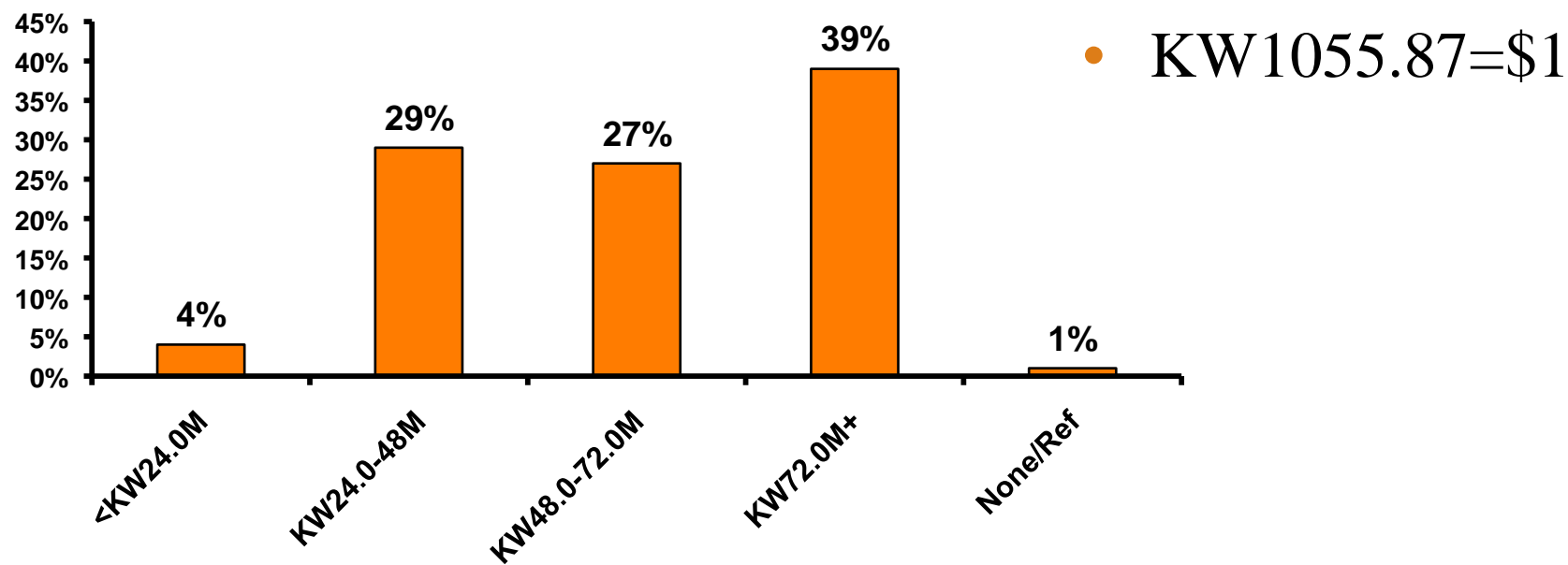
- The average age of the respondents is 35.5 years of age.

# Average Age

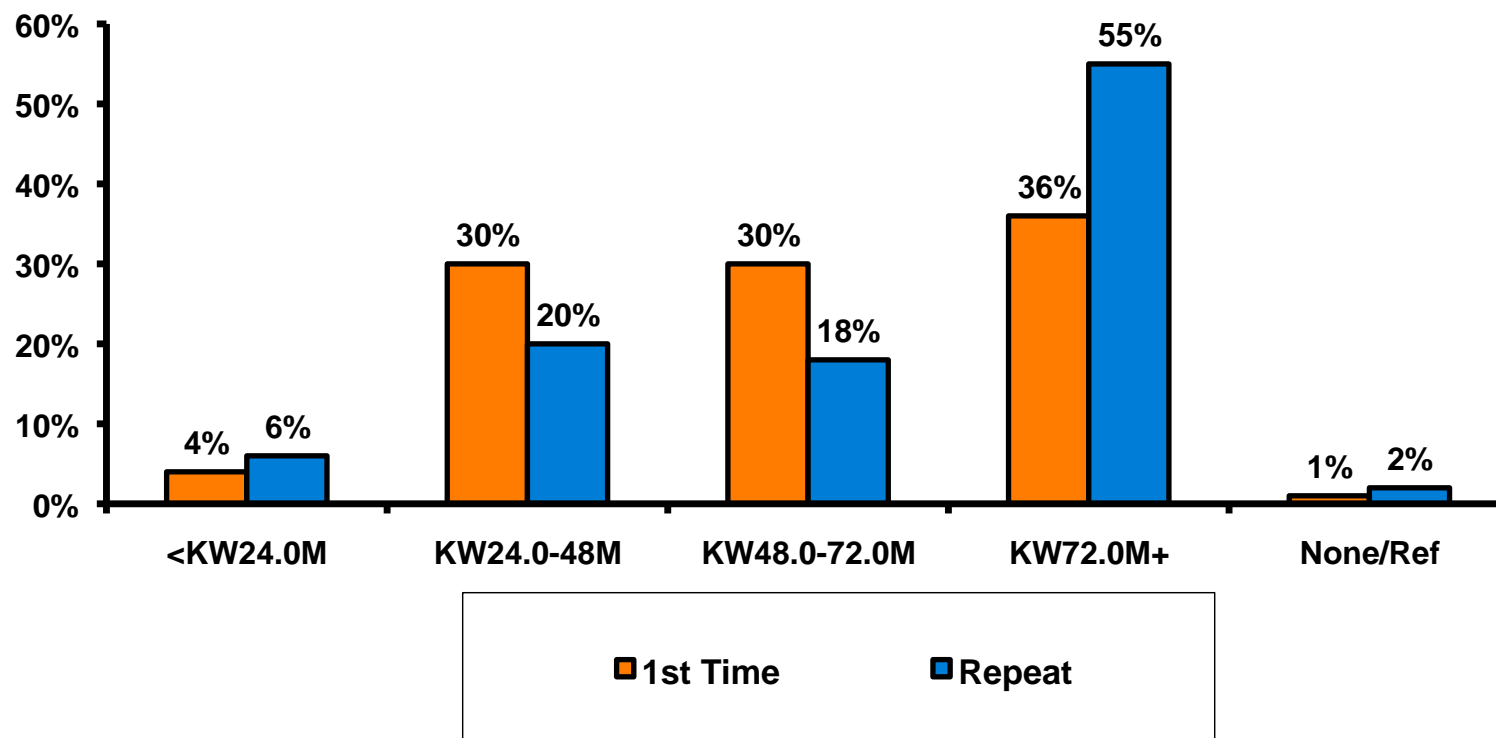




# Personal Income



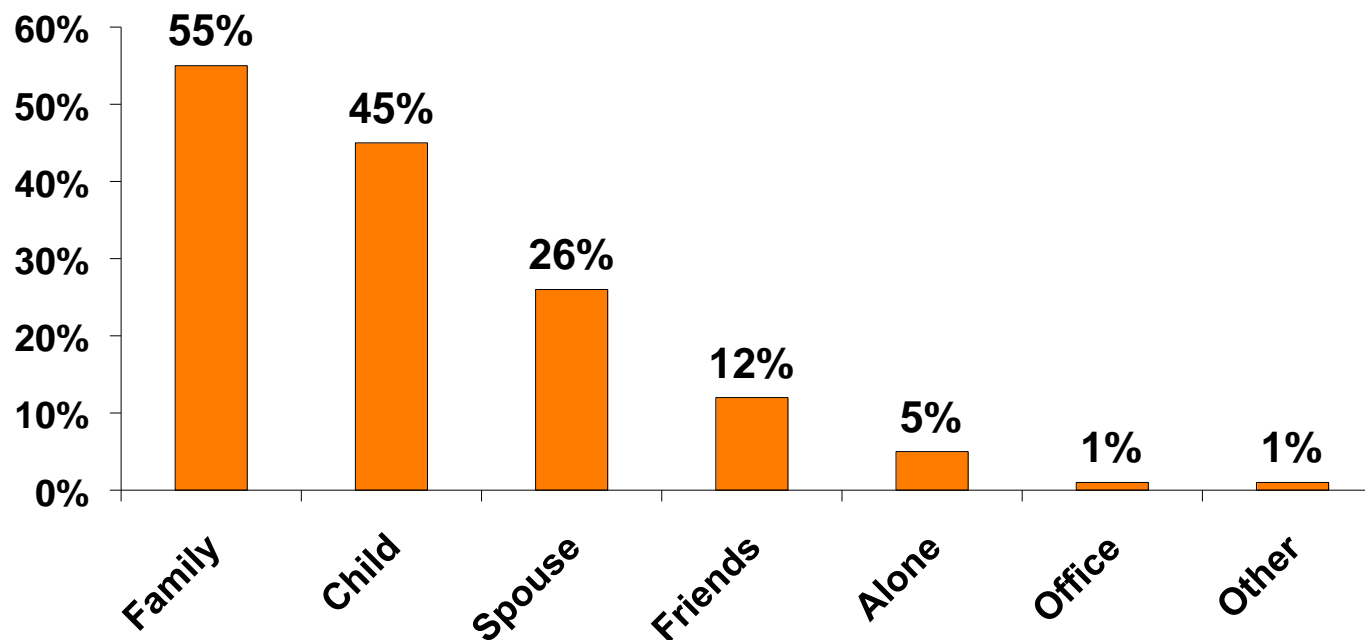
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	14	3	11		5	7	2	
			4%	2%	7%		8%	4%	2%	
	KW24.0M-KW48.0M	Count	97	34	63		32	58	6	1
			29%	20%	38%		50%	32%	7%	8%
	KW48.0M-KW72.0M	Count	95	51	44		11	59	21	4
			28%	29%	27%		17%	33%	26%	31%
	KW72.0M+	Count	131	84	47	2	14	55	52	8
			39%	48%	28%	100%	22%	31%	63%	62%
	Refused	Count	3	2	1		2		1	
			1%	1%	1%		3%		1%	
Total	Count		340	174	166	2	64	179	82	13

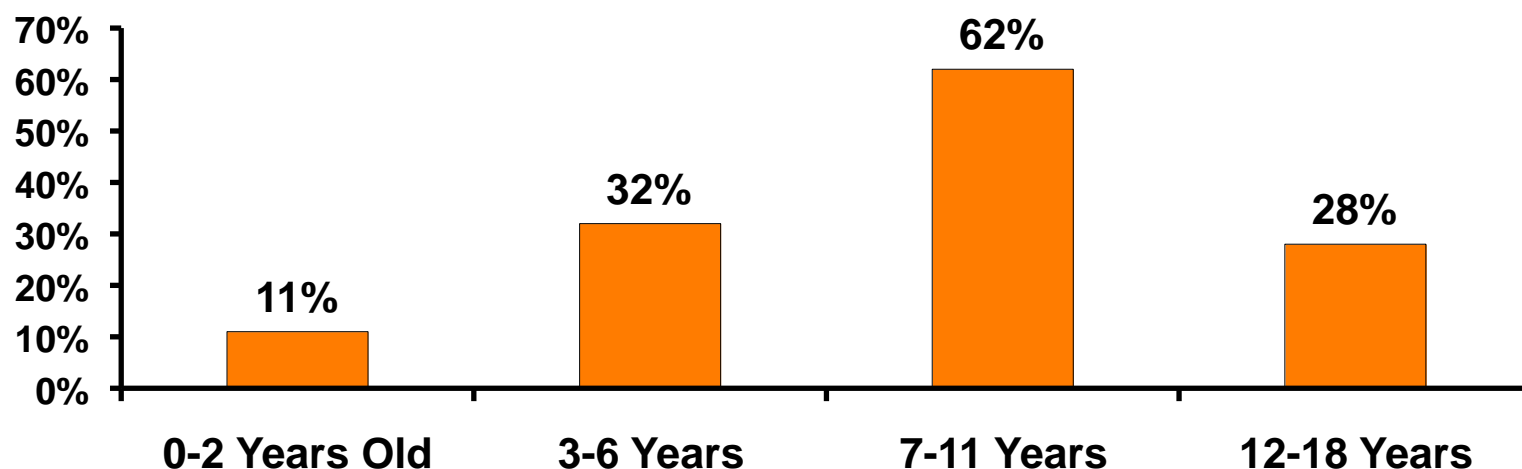
# Travel Companions



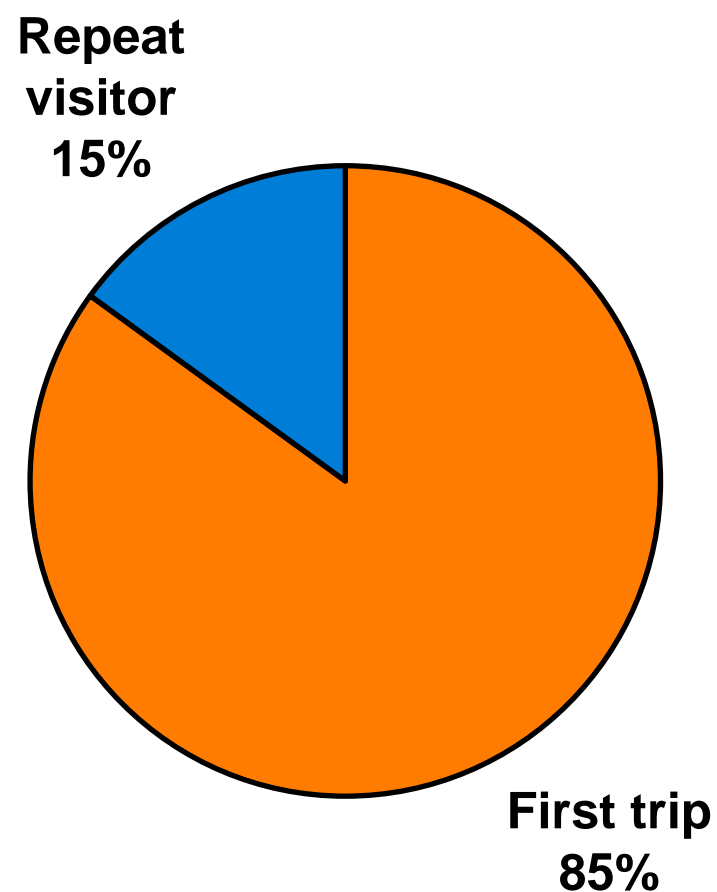
# Number of Children Travel Party

N=160 total respondents traveling with children.

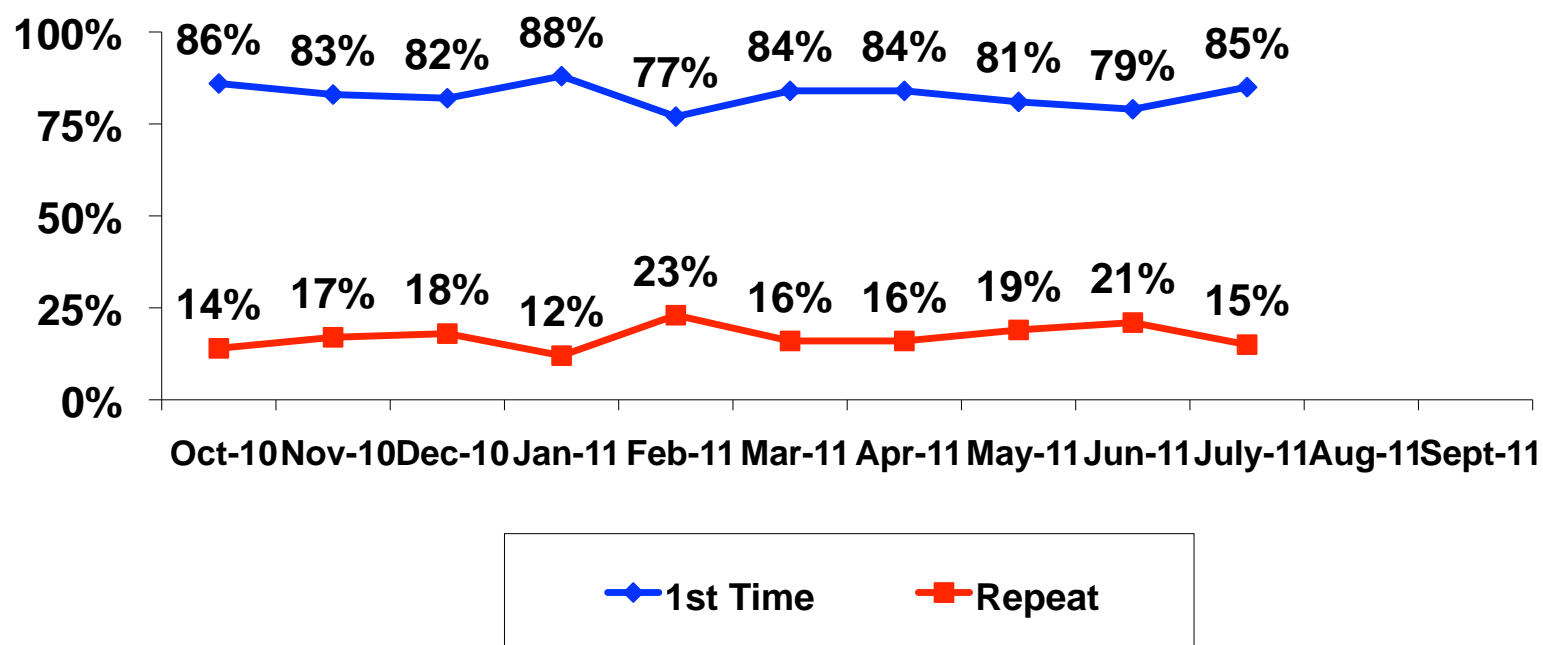
(Of those N=160 respondents, there is a total of 267 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



# Trips to Guam by Age & Gender

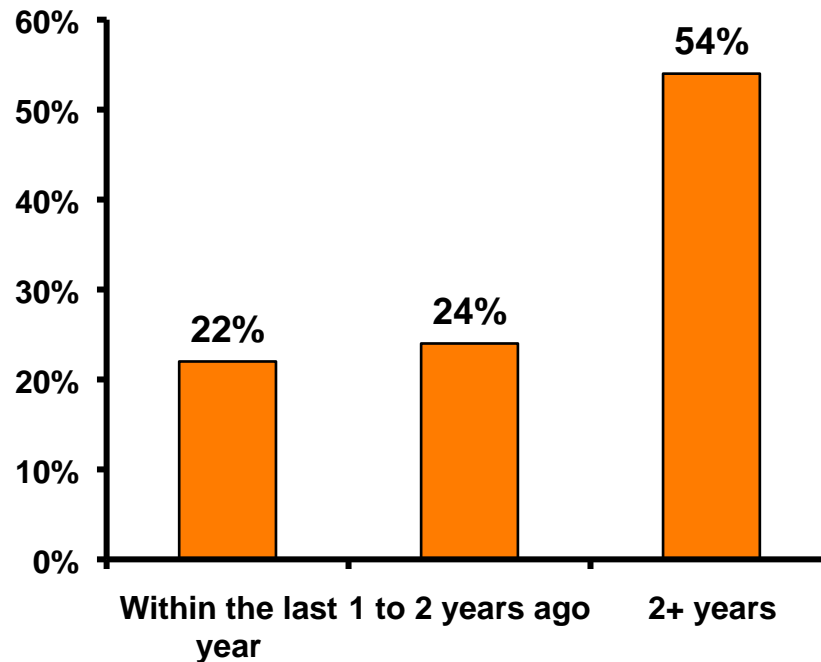
			TOTAL	TRIPS TO GUAM		
				1st	Repeat	
GENDER	Male	Count	177	154	23	
			50%	51%	43%	
	Female	Count	177	146	31	
			50%	49%	57%	
Total	Count		354	300	54	
AGE	<20	Count	2	2		
			1%	1%		
	20-29	Count	69	63	6	
			19%	21%	11%	
	30-39	Count	184	160	24	
			52%	53%	44%	
	40-49	Count	86	64	22	
			24%	21%	41%	
	50+	Count	13	11	2	
			4%	4%	4%	
	Total	Count		354	300	54

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



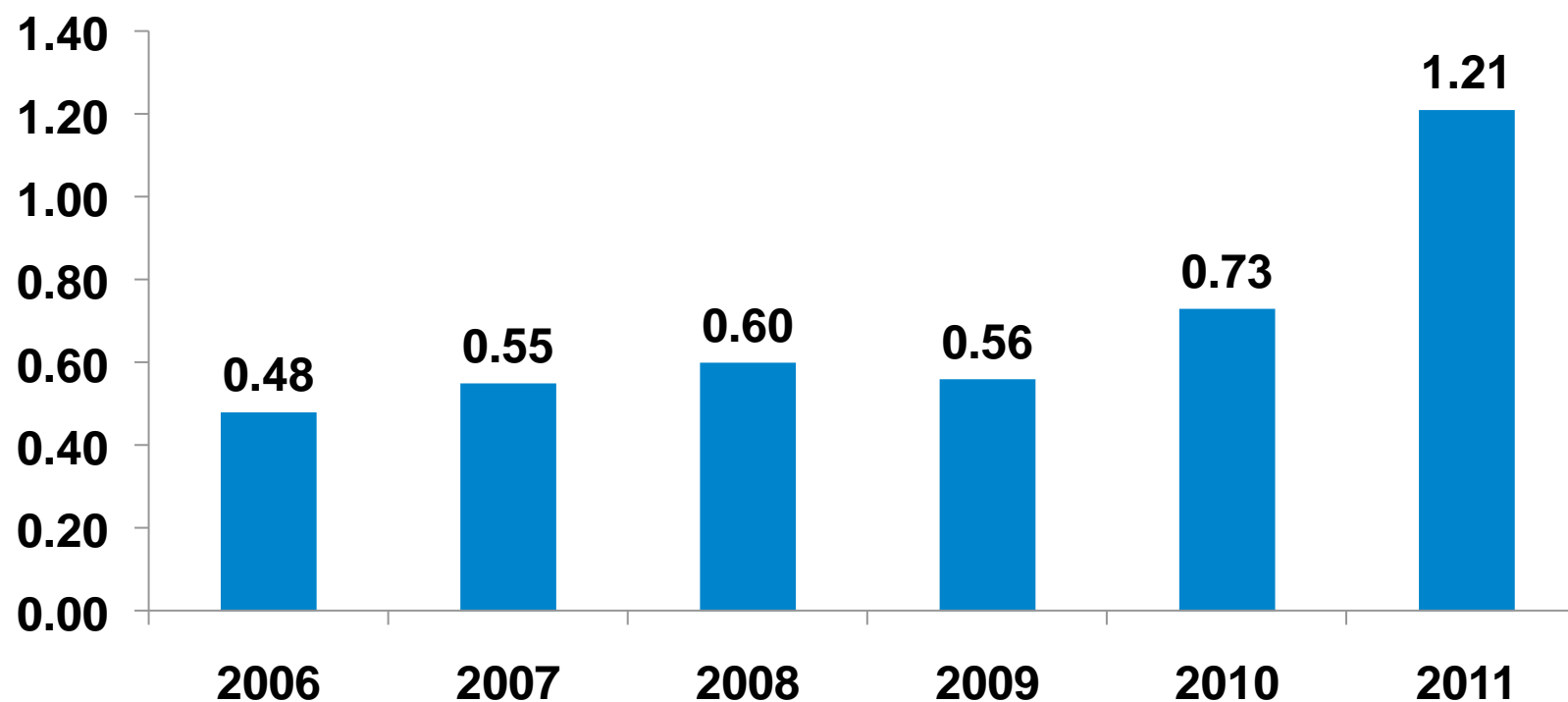
# Repeat Visitors Last Trip

n = 54

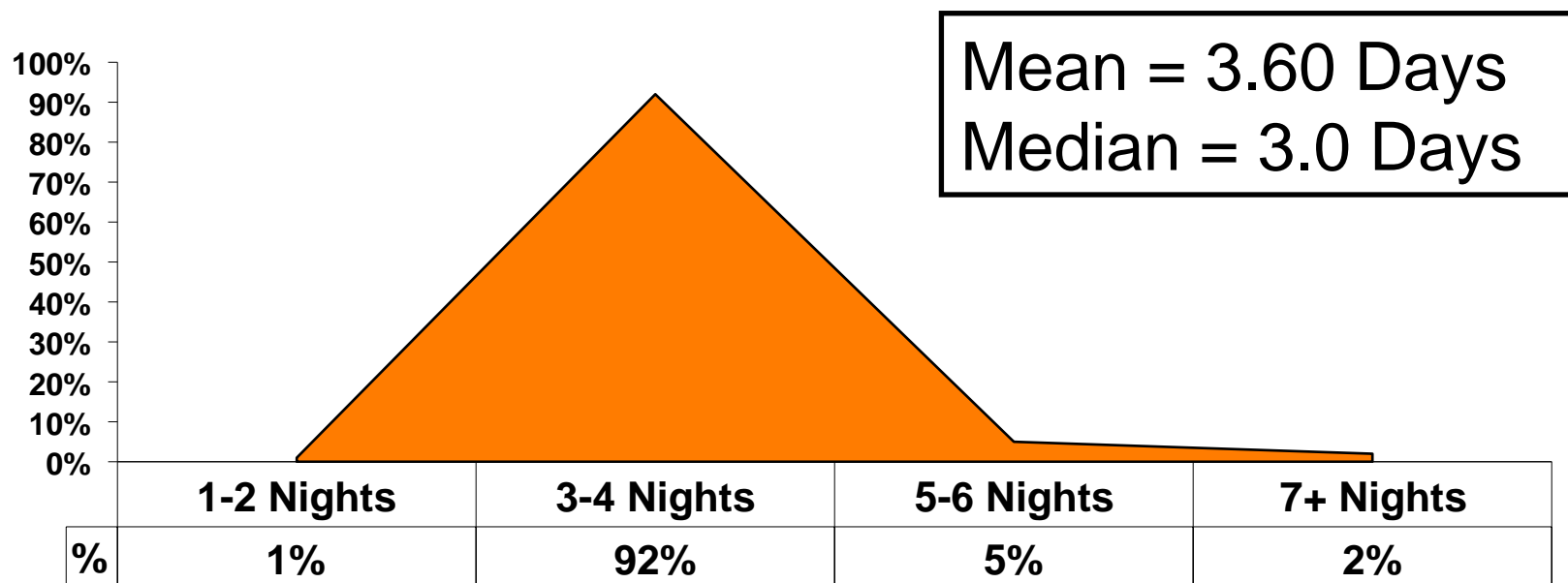


- The average repeat visitor has been to Guam 2.6 times.
- half of the repeat visitors have been to Guam within the last 2 years.

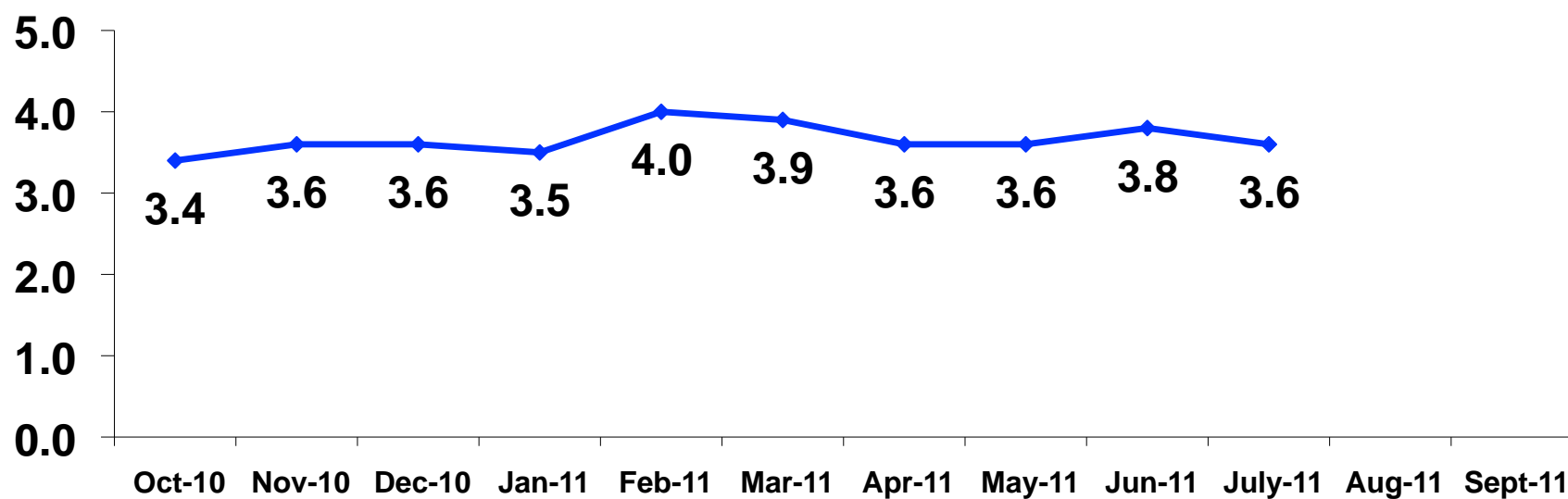
# Average Number Overnight Trips (2005-2011) (2 nights or more)



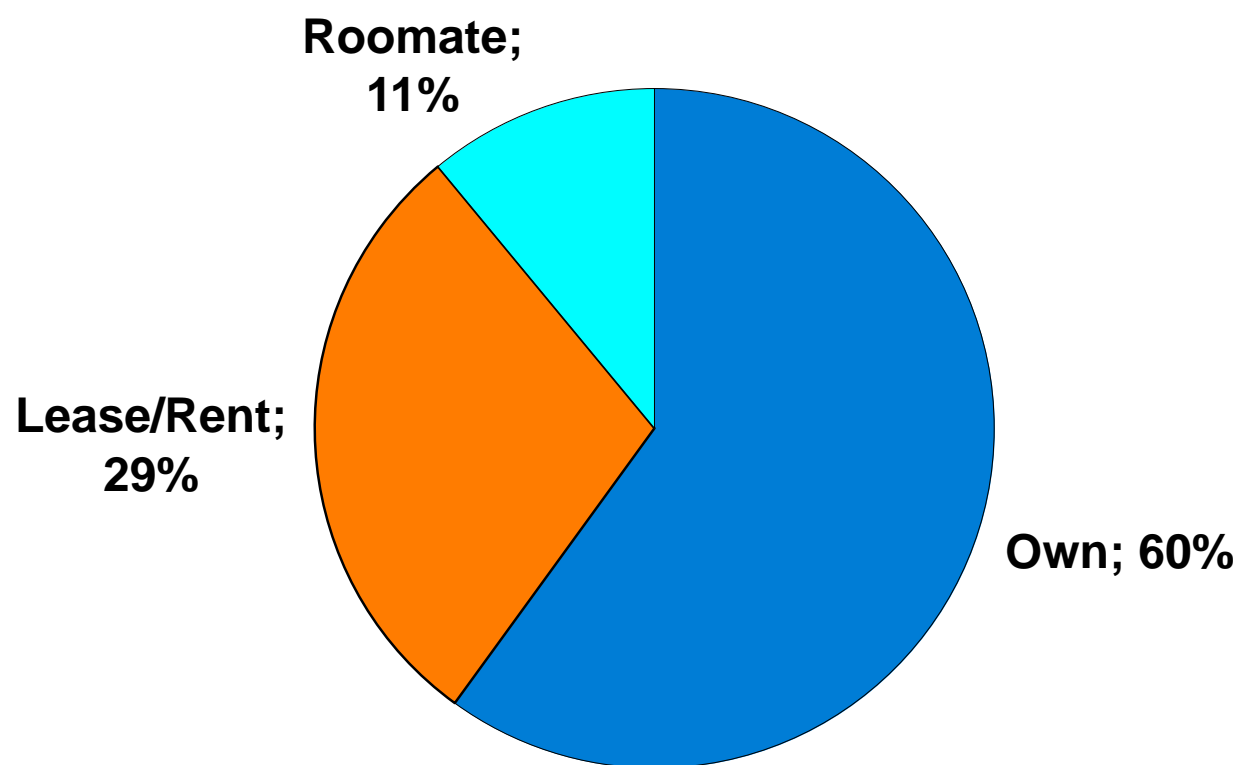
# Length of Stay



# Average Length of Stay



# Living Accommodations

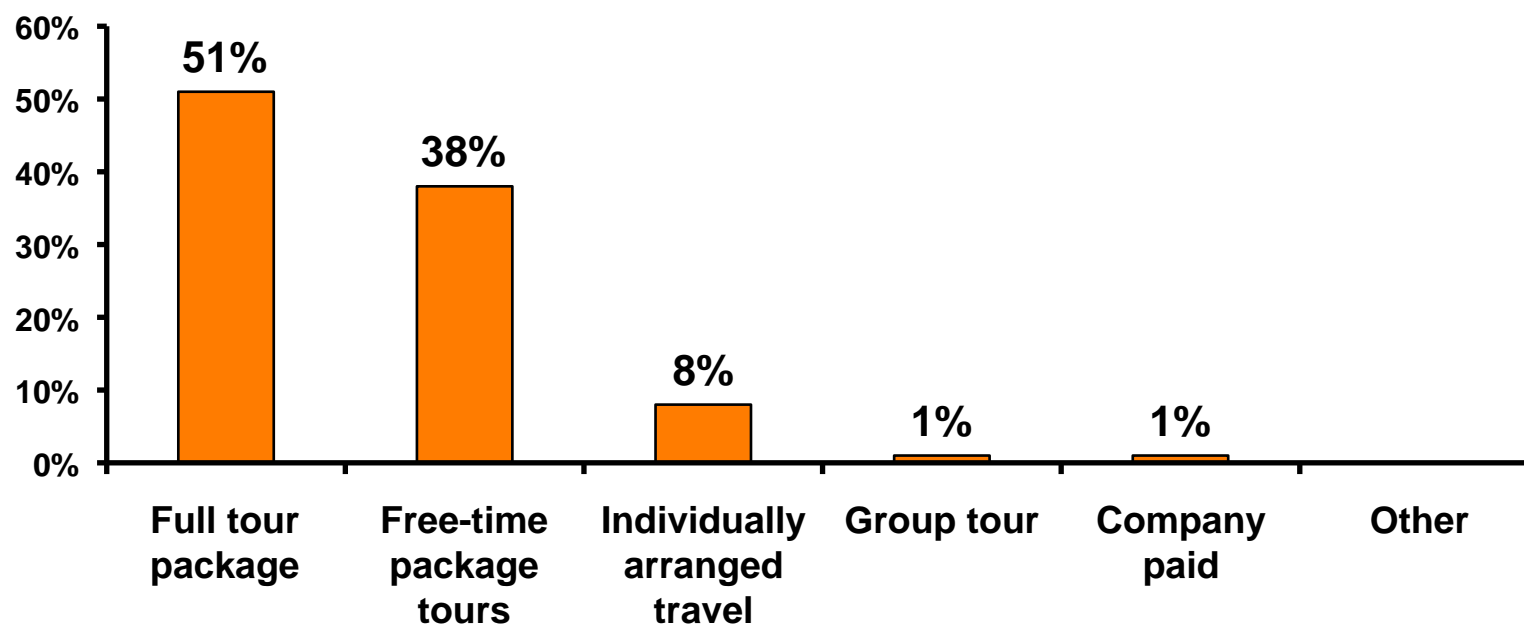


# Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	33%	21%	37%	40%	30%	33%
	Homemaker	13%	7%	11%	19%	9%	
	Self-employed	12%	14%	10%	12%	15%	33%
	Prof/Specialist/Tech	12%	14%	8%	11%	15%	
	Professor/Teacher	8%	14%	11%	4%	8%	
	Student	3%	14%	1%		5%	
	Manager	3%		1%	3%	5%	
	Skilled worker	2%		3%	1%	2%	
	Service worker	2%		6%		1%	
	Other	2%	7%		3%	2%	
	Govt-Exec	2%		2%	1%	2%	
	Free-lancer	2%	7%	3%		2%	
	Judicial	1%			1%	3%	
	Sales/Clerical	1%		1%	1%	2%	
	Govt - Office/non-mgr	1%		1%	2%	1%	
	Govt-Mgr	1%		1%	2%	1%	
	Unemployed	1%		2%			33%
Total	Count	354	14	97	95	131	3

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



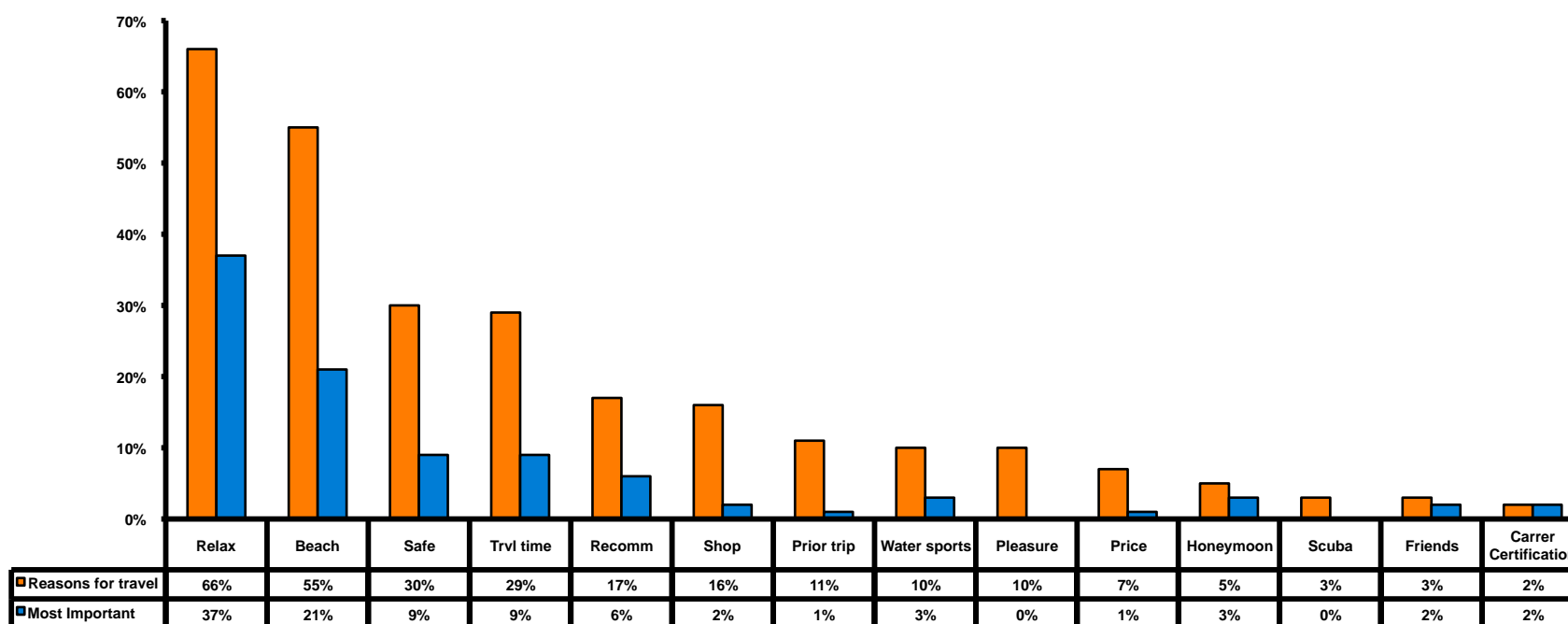


# Accommodation by Income

Average length of stay: 3.60 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	52%	54%	44%	52%	61%	67%
	Hyatt Regency Guam	11%		9%	11%	13%	
	The Westin Resort Guam	8%	23%	8%	14%	4%	
	Sheraton Laguna Resort	5%		4%	5%	5%	
	Hilton Guam Resort & Spa	5%	8%	9%	3%	2%	
	Outrigger Guam Resort	4%	8%	5%	4%	2%	
	Holiday Resort Guam	3%		3%	3%	2%	
	Hotel Nikko Guam	3%		3%	1%	3%	
	Onward Beach Resort	3%		4%	1%	3%	
	Guam Reef Hotel	2%	8%	3%	1%	1%	
	Hotel Sane Fe	1%			3%	2%	
	Royal Orchid Guam	1%		2%	2%		
	Relatives, Friends, Home Stay	1%		2%		1%	
	Fiesta Resort Guam	1%				1%	
	Days Inn Tamuning	0%		1%			
	Ramada Suites Guam	0%		1%			
Total	Count	353	13	97	95	131	3

# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

- The desire to relax,
  - Guam's natural beauty/beaches,
  - Short travel time and safety
- are the three reasons mentioned most often as the most important reason for this particular trip.

# Motivation by Age & Gender

		TOTAL	AGE					GENDER	
			<20	20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	66%	100%	64%	66%	67%	77%	71%	62%
	Beautiful seas, beaches, tropical climate	55%	50%	51%	52%	66%	54%	58%	52%
	It is a safe place to spend a vacation	30%	50%	19%	29%	38%	46%	28%	32%
	Short travel time	29%	50%	23%	35%	24%	23%	26%	33%
	Recommendation of friend, relative, travel agency	17%		17%	17%	19%	8%	16%	19%
	Shopping	16%		23%	18%	6%	8%	14%	18%
	A previous visit	11%		4%	10%	20%	15%	10%	13%
	Water sports	10%		13%	9%	9%	15%	10%	10%
	Pleasure	10%		7%	9%	14%	8%	9%	11%
	Price of the tour package	7%		7%	6%	9%	8%	9%	5%
	Honeymoon	5%		9%	6%	1%		5%	6%
	To visit friends or relatives	3%		6%	1%	4%	15%	2%	4%
	SCUBA diving	3%		1%	4%	1%	8%	3%	3%
	Other	3%		4%	3%		8%	2%	3%
	My company sponsored me	2%		3%	2%	1%	8%	3%	2%
	Career certification or testing	2%		10%	1%			2%	2%
	To golf	2%		1%	2%	4%		1%	3%
	Promotional materials from GVB	1%			1%	4%		2%	1%
	Organized Sporting Activity	1%		1%	1%	2%		2%	1%
	Company or Business trip	1%		3%	1%			1%	1%
	Special promotion	0%		1%					1%
	To get married or Attend wedding	0%		1%					1%
Total	Cases	353	2	69	184	85	13	176	177

# Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	66%	50%	65%	68%	69%	
	Beautiful seas, beaches, tropical climate	55%	43%	54%	56%	56%	33%
	It is a safe place to spend a vacation	30%	7%	29%	31%	34%	
	Short travel time	29%	29%	30%	24%	34%	
	Recommendation of friend, relative, travel agency	17%	14%	19%	17%	18%	
	Shopping	16%		21%	15%	15%	
	A previous visit	11%	14%	9%	7%	14%	33%
	Water sports	10%	7%	8%	14%	8%	33%
	Pleasure	10%	14%	8%	11%	11%	
	Price of the tour package	7%		7%	11%	6%	
	Honeymoon	5%	7%	10%	4%	2%	
	To visit friends or relatives	3%		1%	4%	2%	33%
	SCUBA diving	3%	7%	2%	2%	3%	
	Other	3%	7%	1%	3%	2%	
	My company sponsored me	2%		3%	2%	2%	
	Career certification or testing	2%		3%	1%	3%	
	To golf	2%			3%	3%	
	Promotional materials from GVB	1%		1%	2%	2%	
	Organized Sporting Activity	1%			3%	2%	
	Company or Business trip	1%	7%			2%	
Special promotion	0%		1%				
To get married or Attend wedding	0%					33%	
Total	Cases	353	14	97	95	130	3

# SECTION 3 **EXPENDITURES**

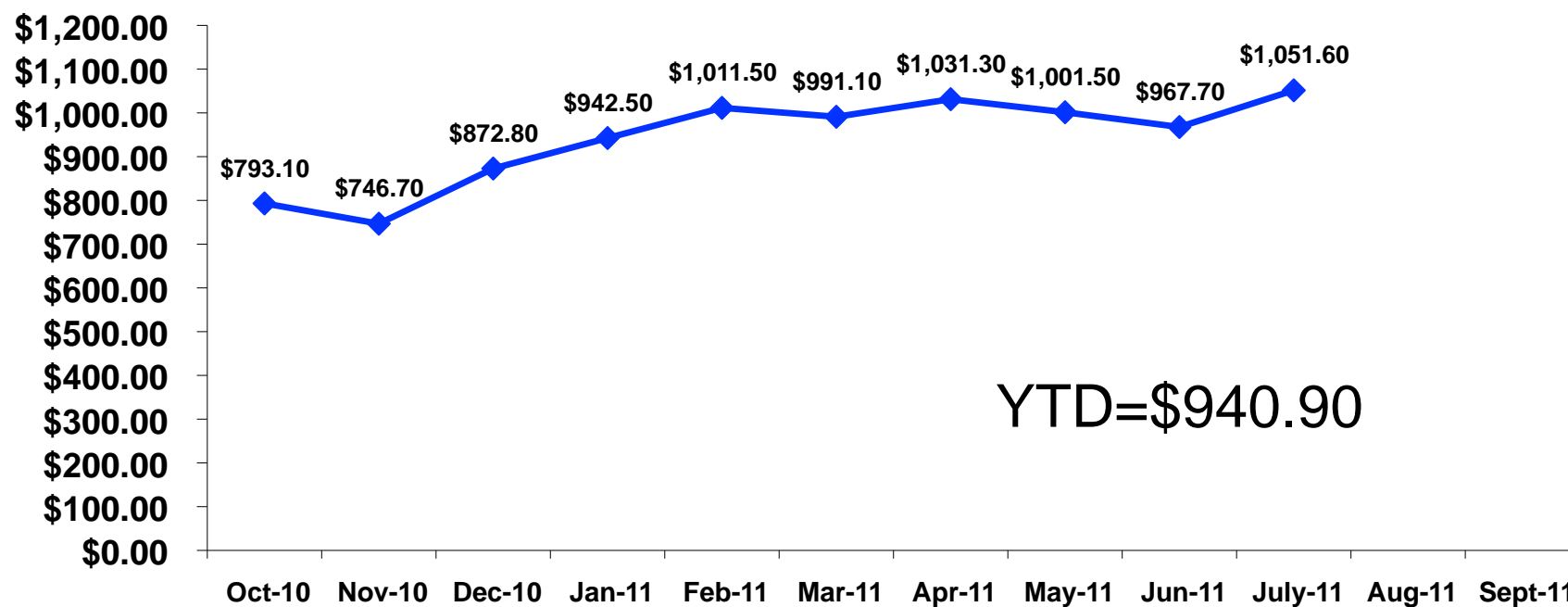
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# Prepaid Expenditures

## KW1055.87/US\$1

- \$2,751.80 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,944 = maximum (highest amount recorded for the entire sample)
- \$1,051.60 = overall mean average per person prepaid expenditures

# Prepaid Expenditures





# Breakdown of Prepaid Expenditures

KW1055.87=\$1

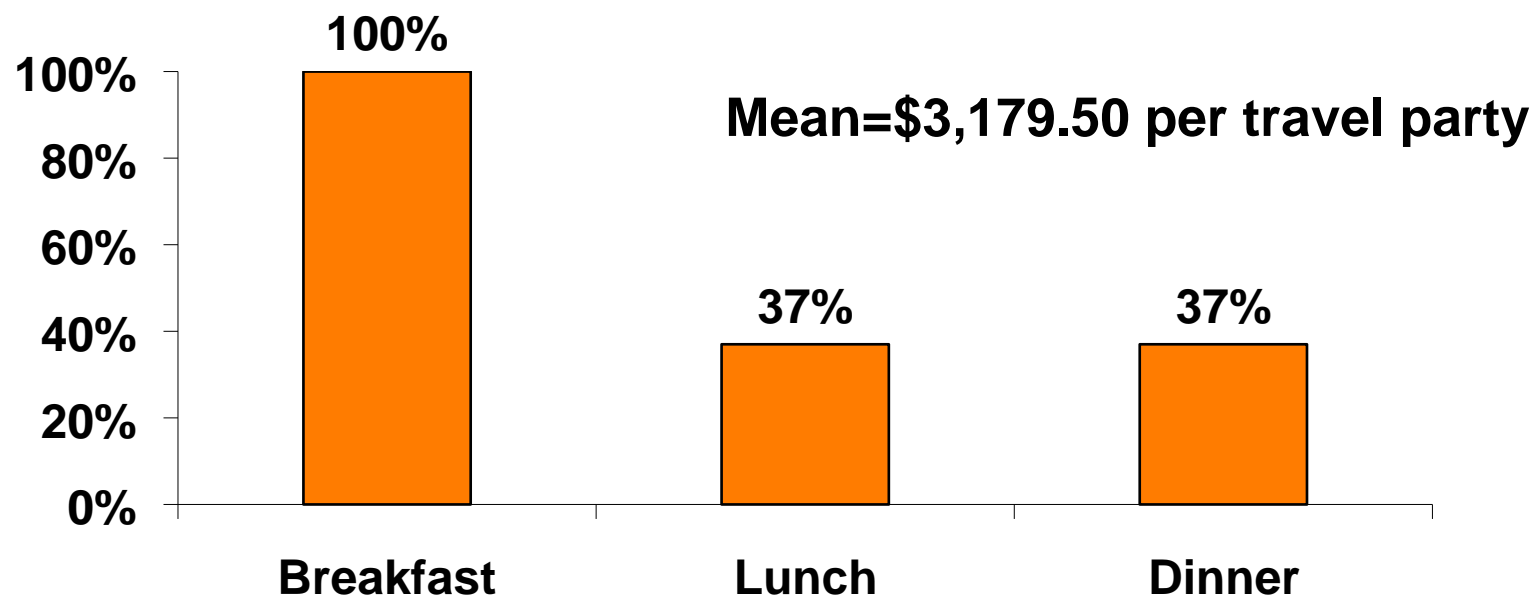
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,339.60
Air & Accommodation w/ daily meal package	\$3,179.50
Air only	\$1,082.50
Accommodation only	\$1,136.50
Accommodation w/ daily meal only	\$608.80
Food & Beverages in Hotel	\$232.00
Ground transportation- Korea	\$84.80
Ground transportation- Guam	\$239.10
Optional tours/ activities	\$283.60
Other expenses	\$333.50
Total Prepaid	\$2,751.80

# Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

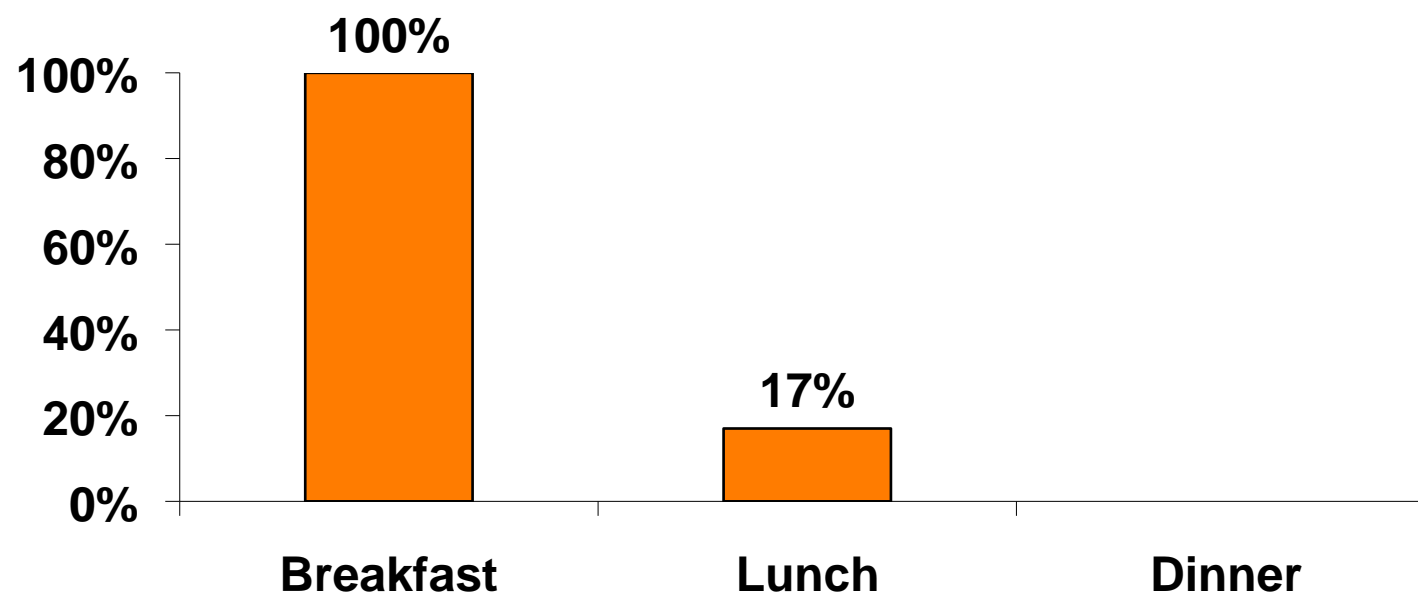
n=241



# Prepaid Meal Breakdown

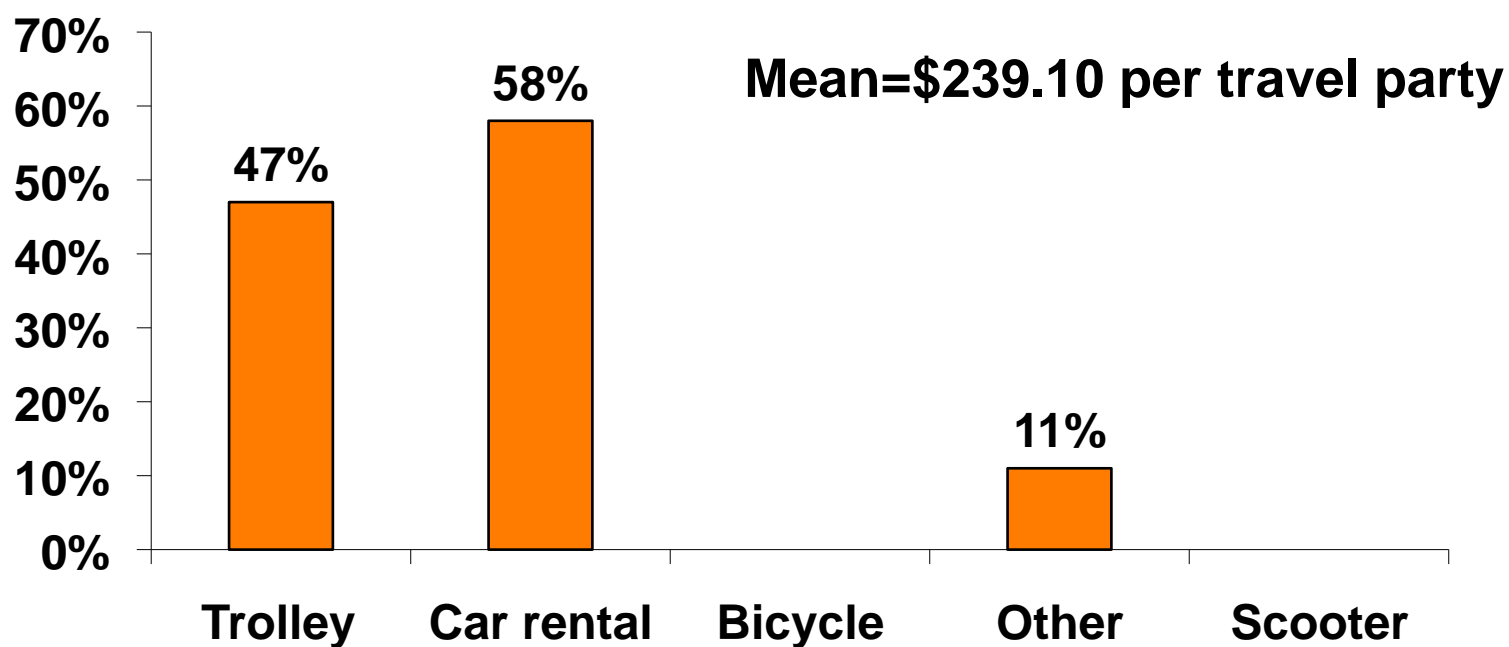
Accommodations with Daily Meal Package

n= 6



Mean= \$608.80 per travel party

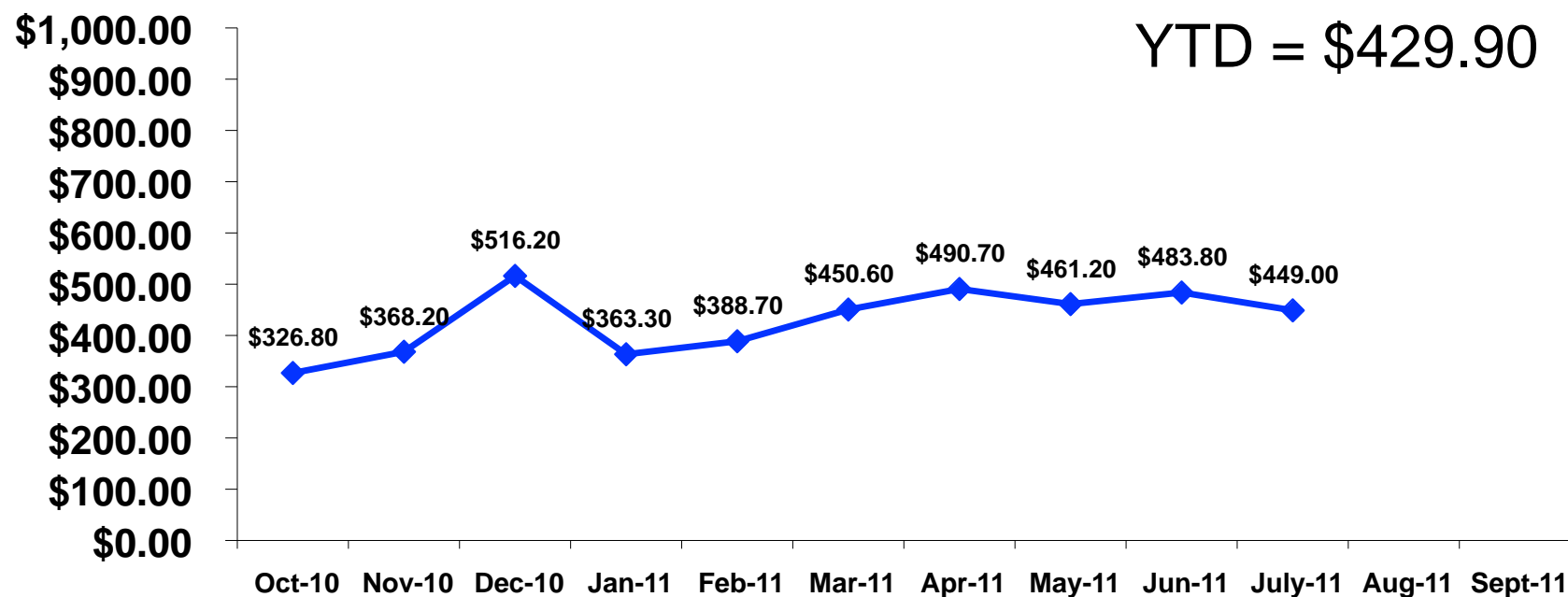
## Prepaid Ground Transportation n=19



# On-Island Expenditures

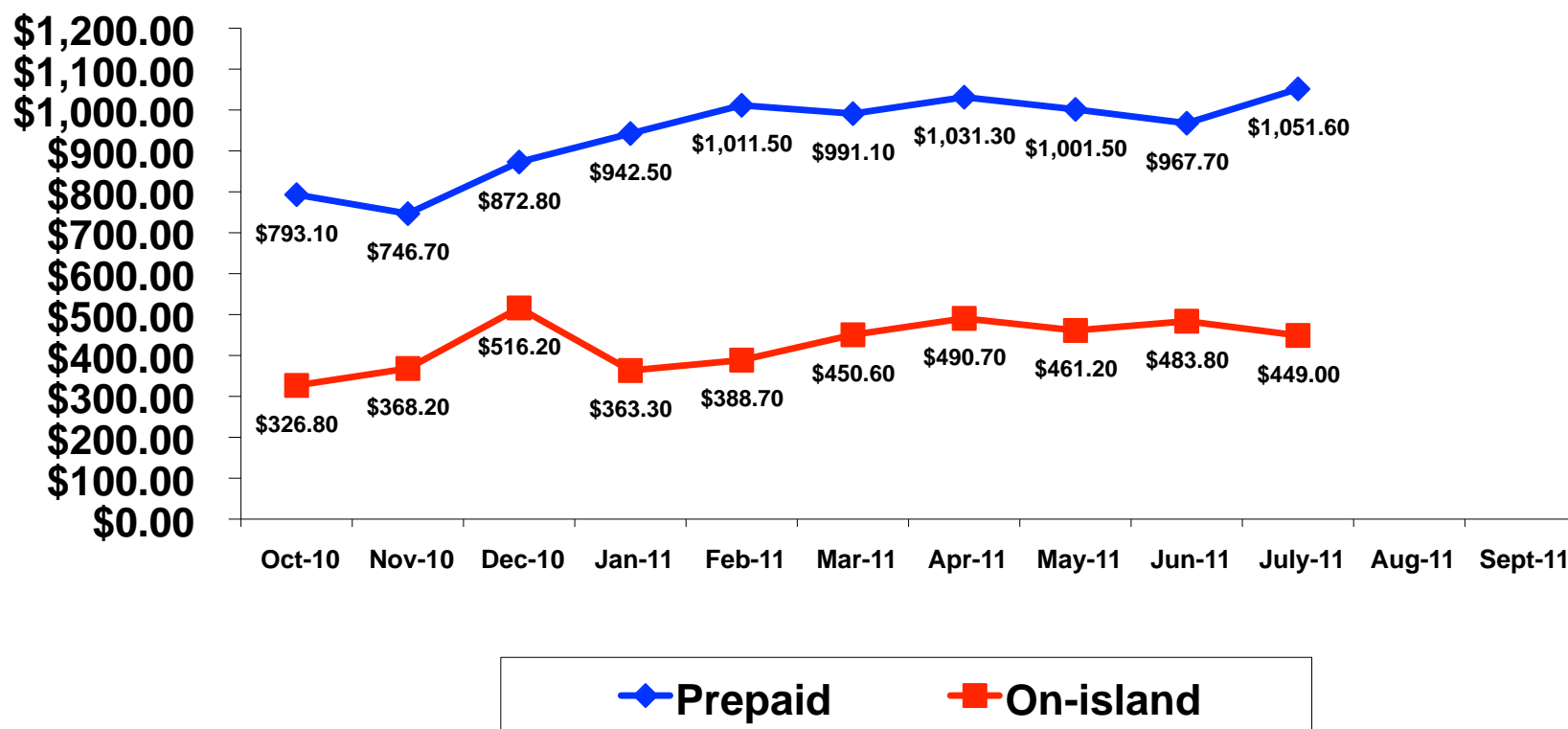
- \$1,024.10 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,100 = Maximum (highest amount recorded for the entire sample)
- \$449.00 = overall mean average per person on-island expenditure

# On-Island Expenditures



# Prepaid/On-Island Expenditures

Prepaid YTD=\$940.90 • On-Island YTD = \$429.90



# Total On-Island Expenditure by Gender & Age

		GENDER		GENDER									
		Male	Female	Male					Female				
				AGE					AGE				
				<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$1,024.14	\$1,044.91	\$1,000.00	\$638.61	\$882.30	\$1,188.00	\$2,247.27	\$1,000.00	\$876.06	\$1,098.04	\$970.63	\$150.00
	Median	\$700	\$700	\$1,000	\$440	\$700	\$700	\$2,000	\$1,000	\$550	\$700	\$950	\$150



# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$58.73	\$42.15	\$75.31	\$0.00	\$48.38	\$64.35	\$42.02	\$153.85
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$34.85	\$39.33	\$30.38	\$50.00	\$20.14	\$36.05	\$34.48	\$96.15
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$68.05	\$74.48	\$61.62	\$0.00	\$80.48	\$77.51	\$38.66	\$73.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$136.00	\$158.34	\$113.65	\$350.00	\$91.23	\$117.43	\$200.47	\$176.92
	Median	\$0	\$0	\$0	\$350	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$232.33	\$253.46	\$211.20	\$0.00	\$184.20	\$216.10	\$304.34	\$276.92
	Median	\$0	\$18	\$0	\$0	\$0	\$50	\$36	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$106.07	\$90.31	\$121.84	\$50.00	\$106.96	\$102.71	\$90.95	\$257.69
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$31.52	\$28.27	\$34.77	\$0.00	\$31.46	\$38.77	\$17.84	\$24.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$353.00	\$357.93	\$348.06	\$550.00	\$251.26	\$335.04	\$391.00	\$865.38
	Median	\$60	\$30	\$80	\$550	\$60	\$60	\$65	\$90
TOTAL ON ISLAND	Mean	\$1,024.14	\$1,044.91	\$1,003.38	\$1,000.00	\$814.12	\$994.86	\$1,119.76	\$1,924.62
	Median	\$700	\$700	\$700	\$1,000	\$500	\$700	\$775	\$2,000

# On-Island Expenditures

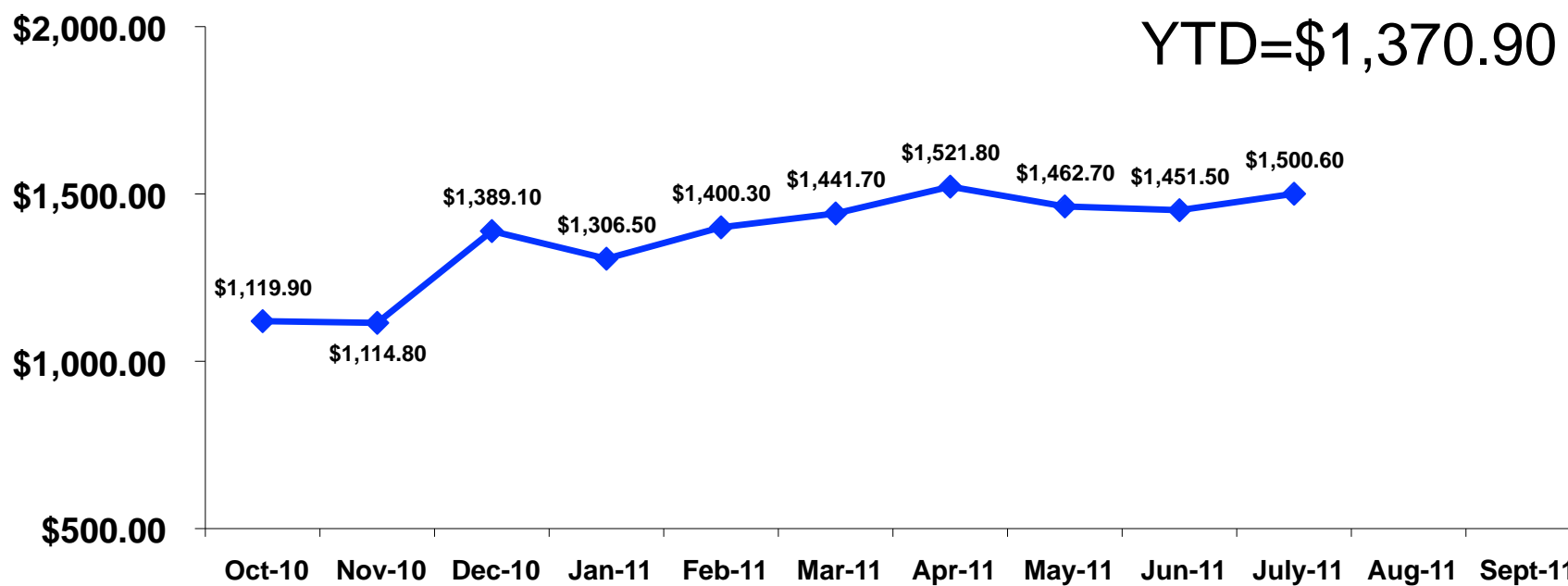
## First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$56.30	\$72.26
	Median	\$0	\$0
F&B-FF	Mean	\$32.10	\$50.11
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$70.65	\$53.61
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$143.04	\$96.85
TOUR	Median	\$0	\$0
GIFT/	Mean	\$237.18	\$205.41
SOUV-SELF	Median	\$5	\$0
GIFT/ SOUV-	Mean	\$108.09	\$94.85
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$30.06	\$39.63
	Median	\$0	\$0
OTHER EXP	Mean	\$304.83	\$620.56
	Median	\$60	\$80
TOTAL ON	Mean	\$986.50	\$1,233.28
ISLAND	Median	\$700	\$1,000

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

- \$1,500.60 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,115 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures

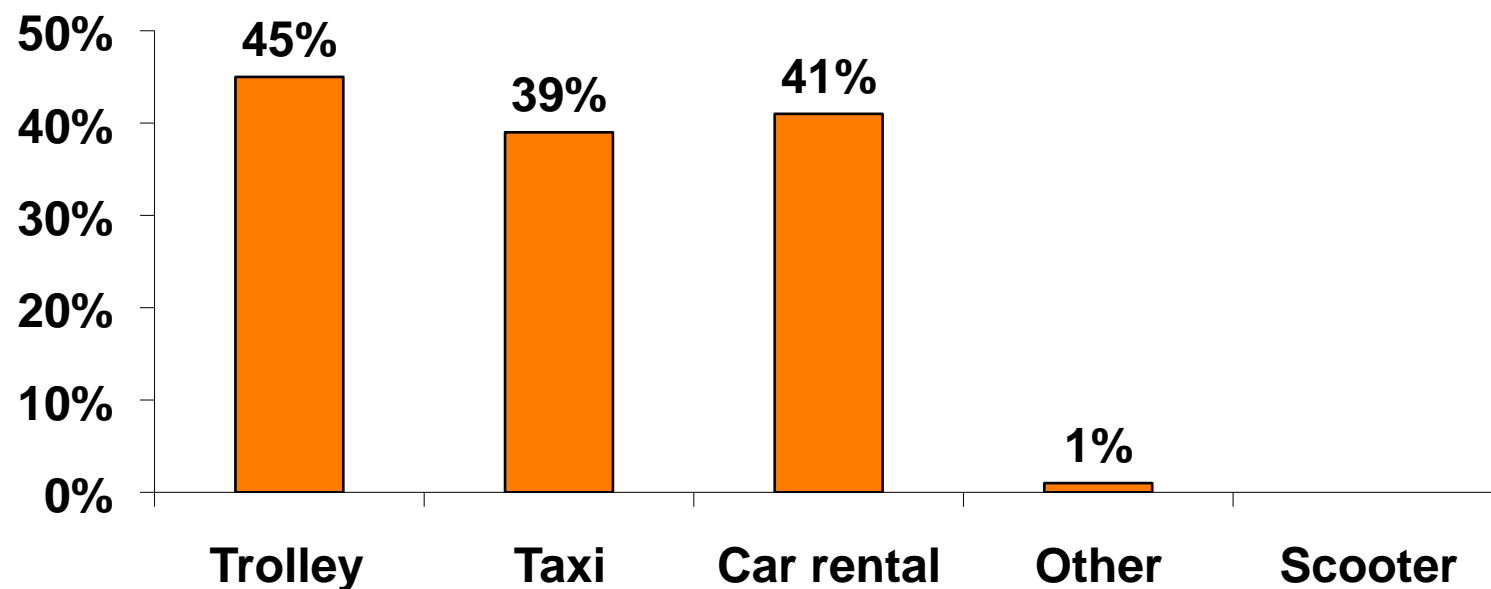


# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$58.70
Food & beverage in fast food restaurant/ convenience store	\$34.90
Food & beverage at restaurants or drinking establishments outside a hotel	\$68.00
Optional tours and activities	\$136.00
Gifts/ souvenirs for yourself/companions	\$232.30
Gifts/ souvenirs for friends/family at home	\$106.10
Local transportation	\$31.50
Other expenses not covered	\$353.00
<b>Average Total</b>	<b>\$1,024.10</b>

# Local Transportation

n=118



Mean=\$31.50 per travel party

# Guam Airport Expenditures

- \$79.20 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

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# Breakdown of Airport Expenditures

	MEAN \$
<b>Food &amp; Beverages</b>	\$4.80
<b>Gifts/Souvenirs Self</b>	\$39.90
<b>Gifts/Souvenirs Others</b>	\$34.40
<b>Total</b>	<b>\$79.20</b>

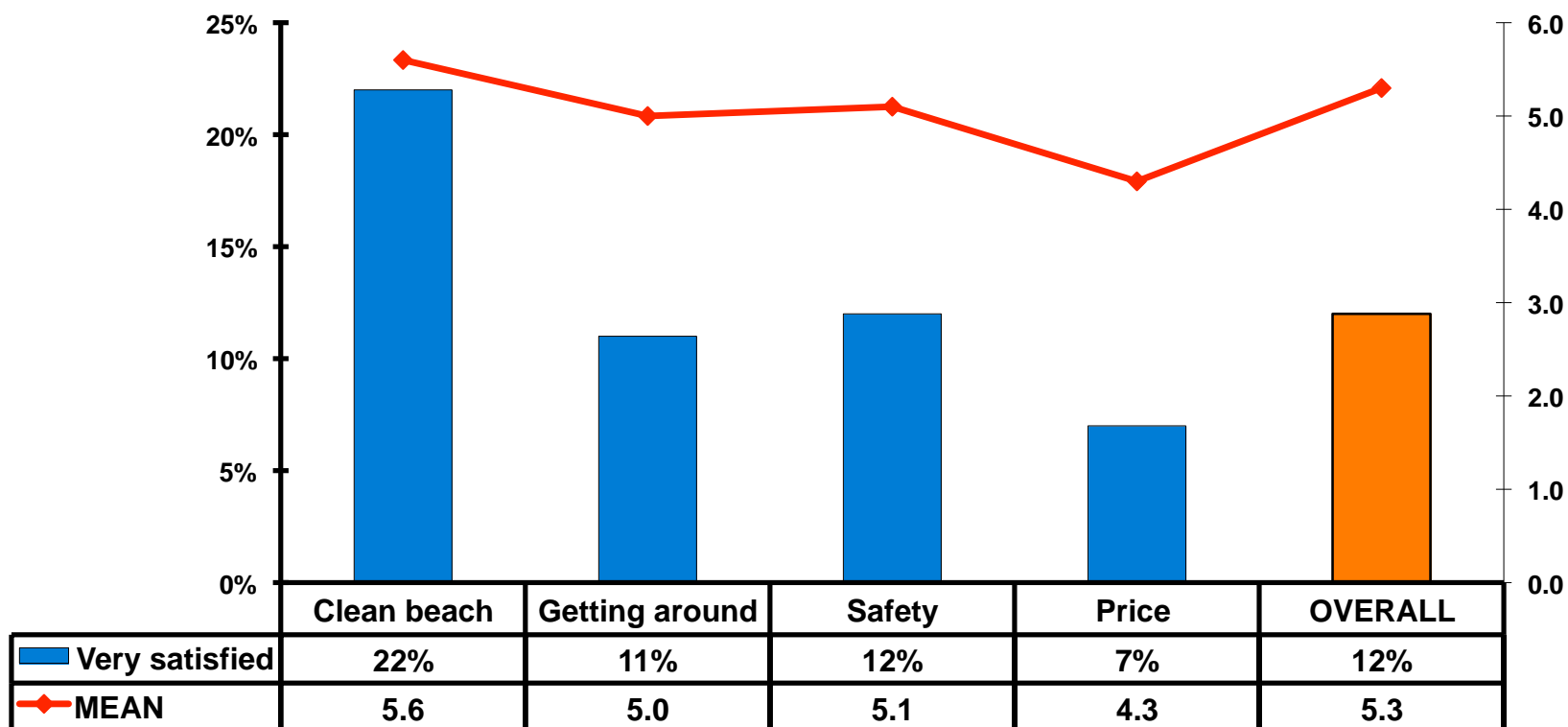


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

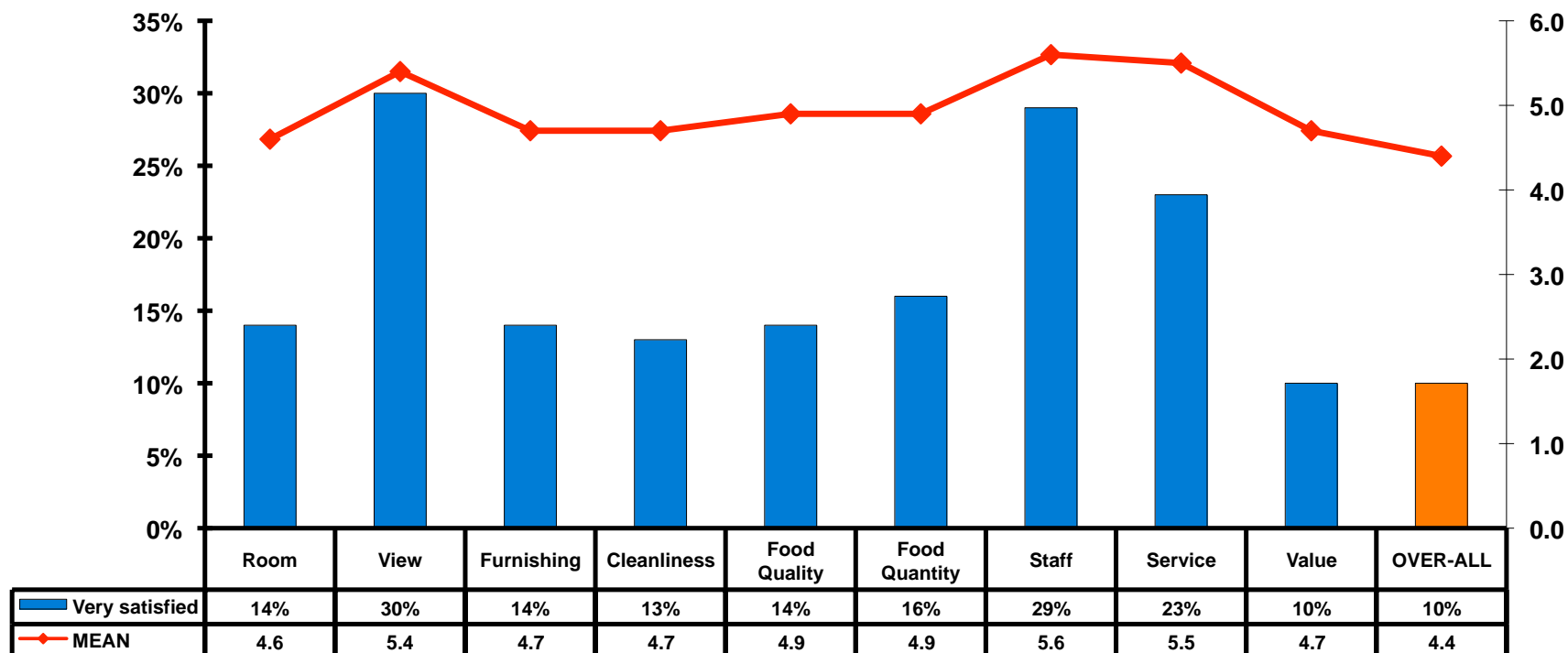
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

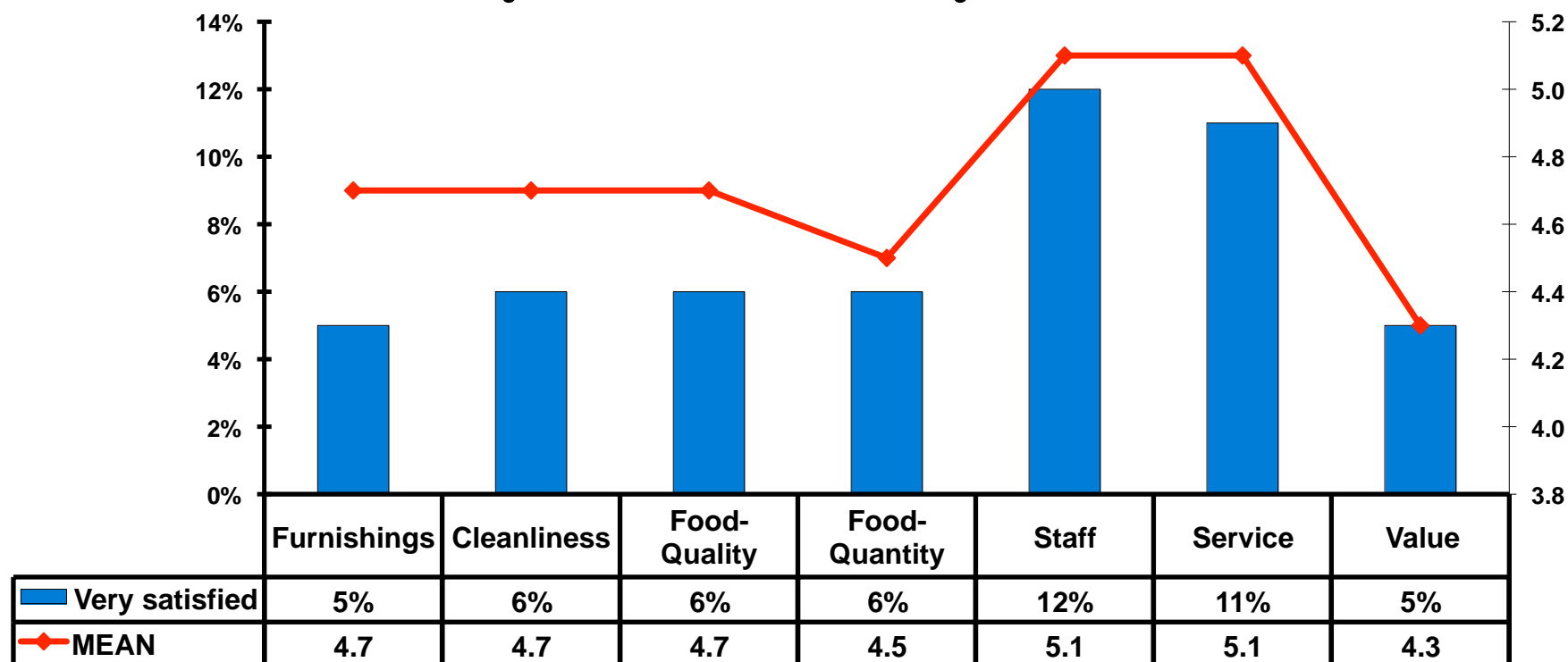
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

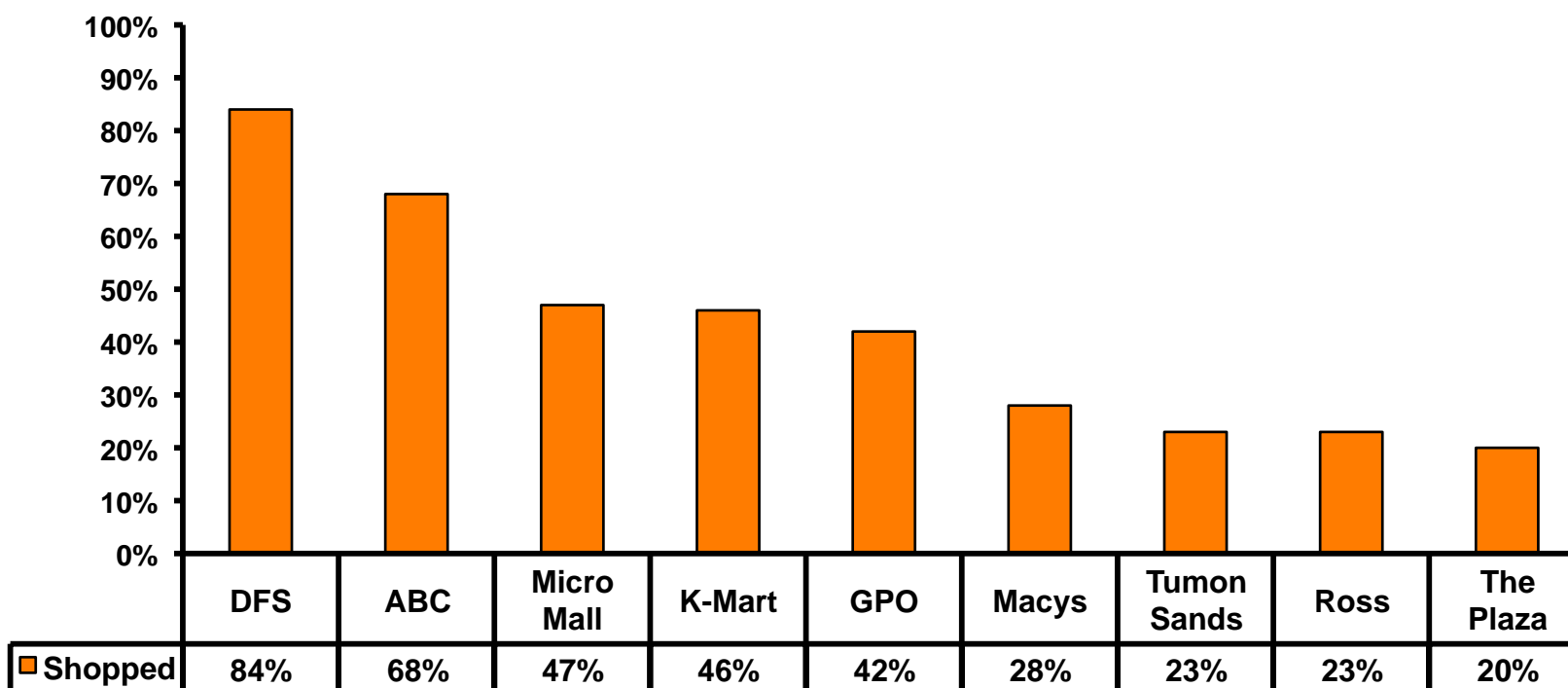
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

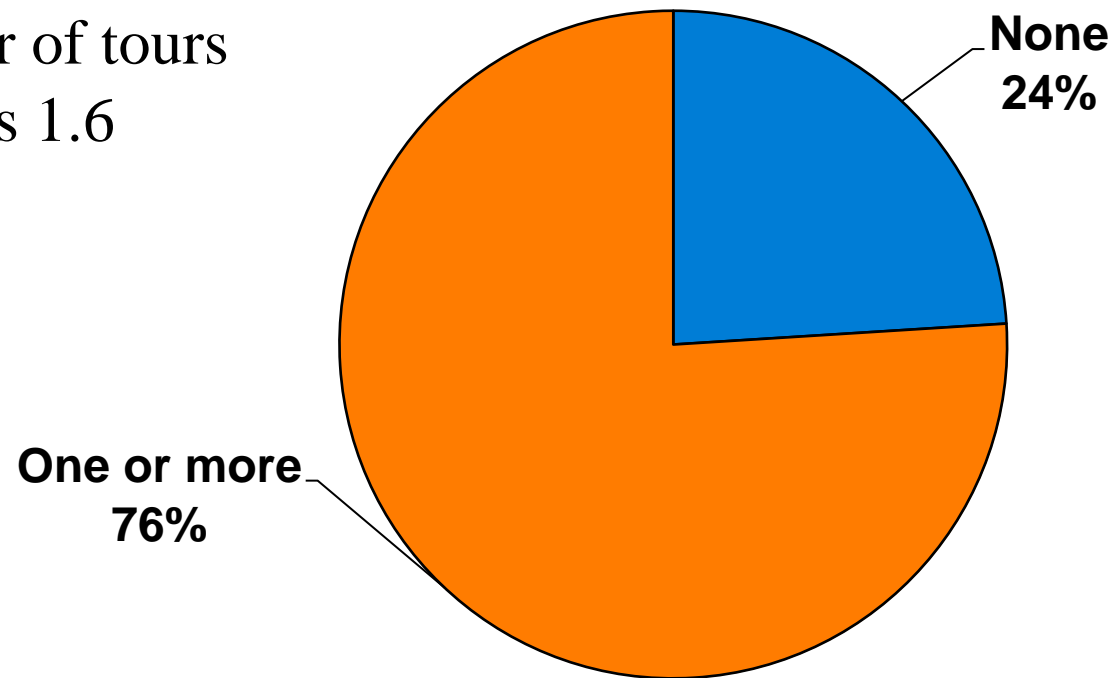
**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Shopping</b>	<b>Variety of Shopping</b>
Score of 6 to 7 = <b>46%</b>	Score of 6 to 7 = <b>41%</b>
Score of 4 to 5 = <b>46%</b>	Score of 4 to 5 = <b>47%</b>
Score 1 to 3 = <b>8%</b>	Score 1 to 3 = <b>13%</b>
<b>MEAN = 5.1</b>	<b>MEAN = 5.0</b>

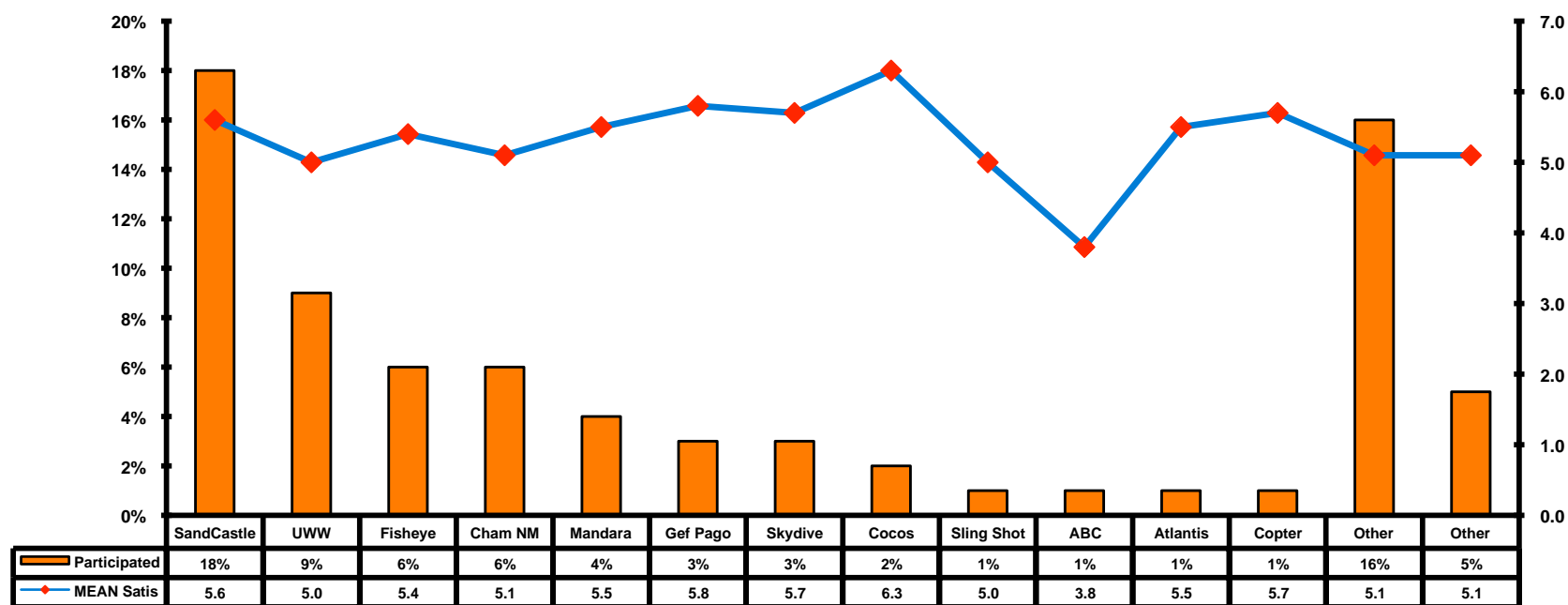
# Optional Tour Participation

- Average number of tours participated in is 1.6



# Optional Tours

## Participation & Satisfaction





# Day Tours Satisfaction

**7pt Rating Scale**

**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Day Tour</b>	<b>Variety of Day Tour</b>
Score of 6 to 7 = <b>39%</b>	Score of 6 to 7 = <b>31%</b>
Score of 4 to 5 = <b>54%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>7%</b>	Score 1 to 3 = <b>14%</b>
<b>MEAN = 5.0</b>	<b>MEAN = 4.7</b>

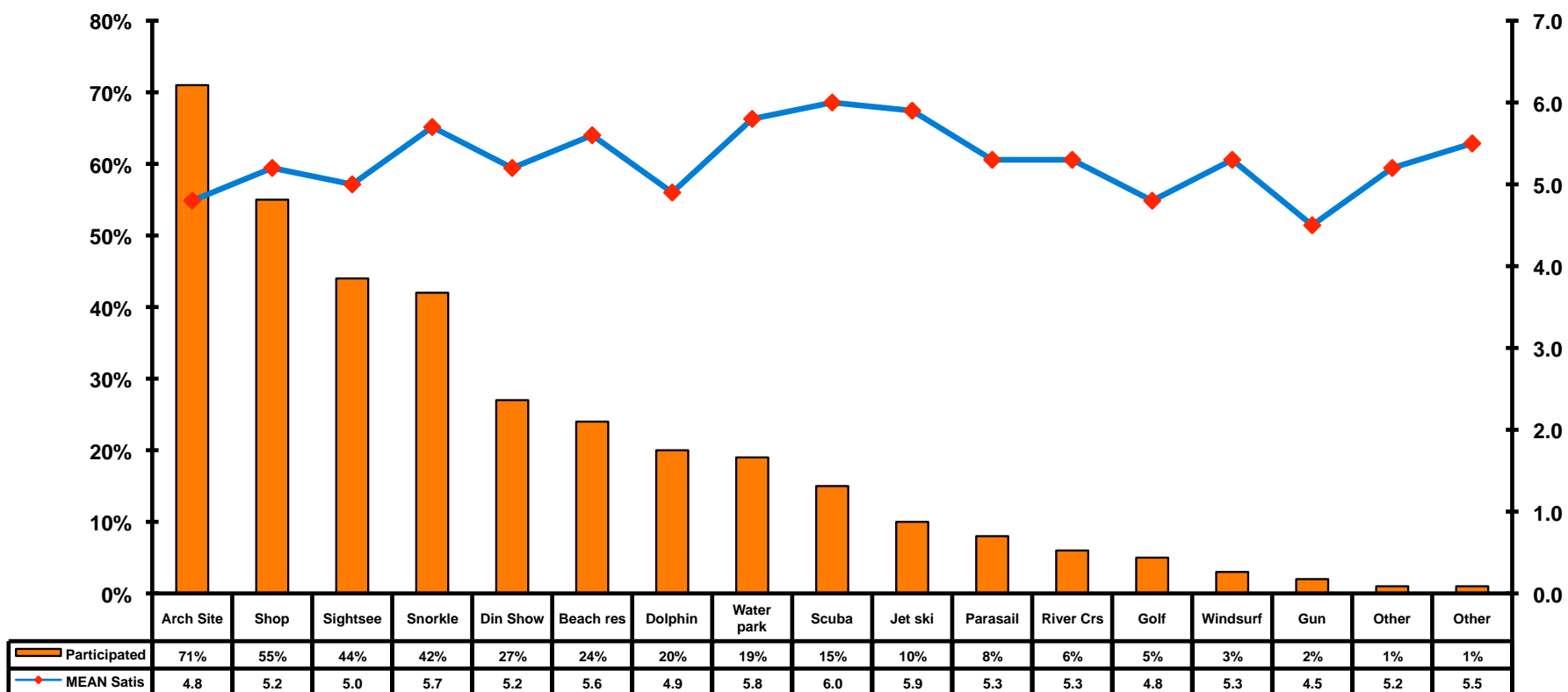
# Night Tours Satisfaction

**7pt Rating Scale**

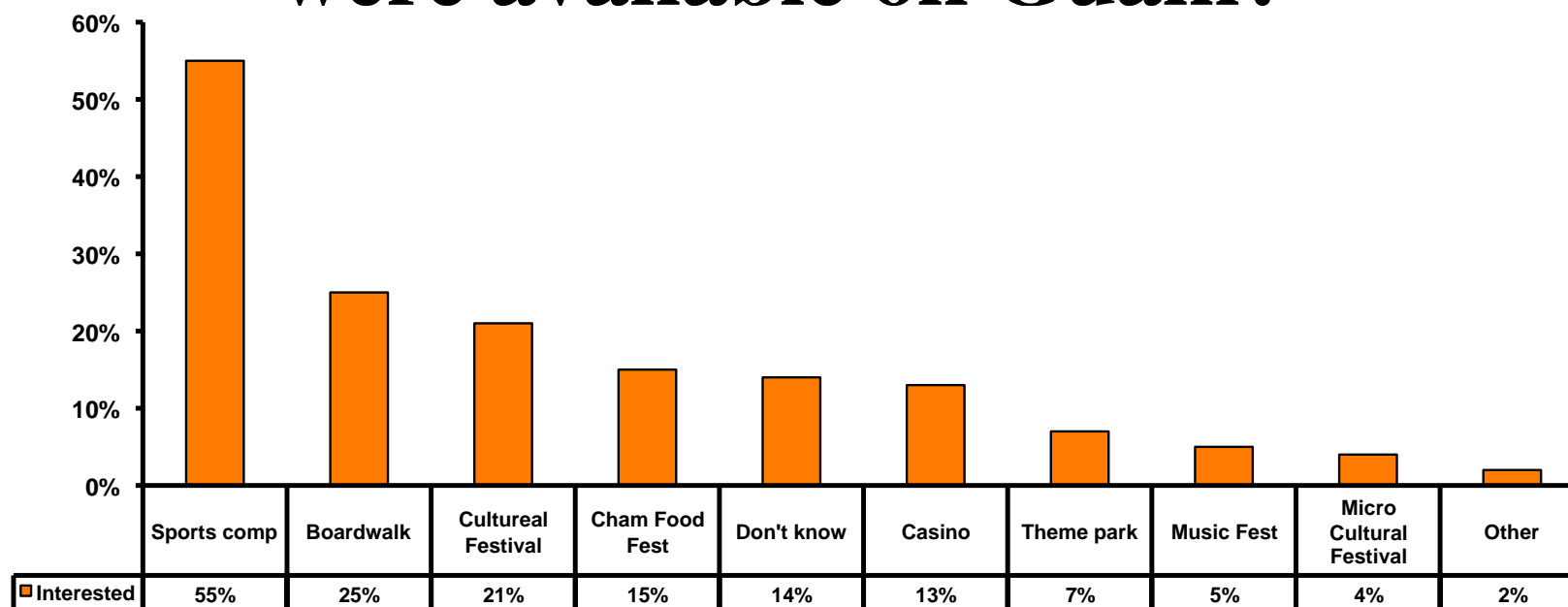
**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>24%</b>	Score of 6 to 7 = <b>23%</b>
Score of 4 to 5 = <b>61%</b>	Score of 4 to 5 = <b>56%</b>
Score 1 to 3 = <b>16%</b>	Score 1 to 3 = <b>22%</b>
<b>MEAN = 4.4</b>	<b>MEAN = 4.3</b>

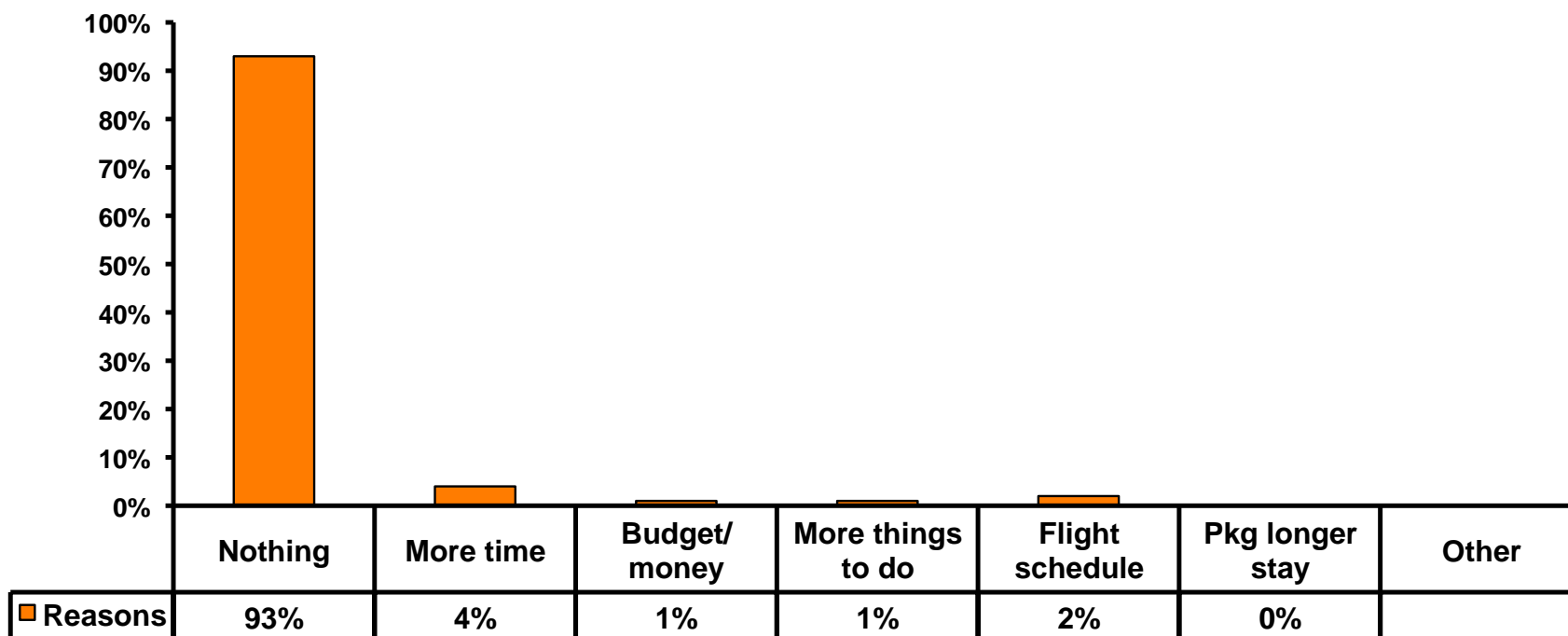
# Satisfaction with Other Activities



# Which activities or attractions would you most likely participate in if they were available on Guam?



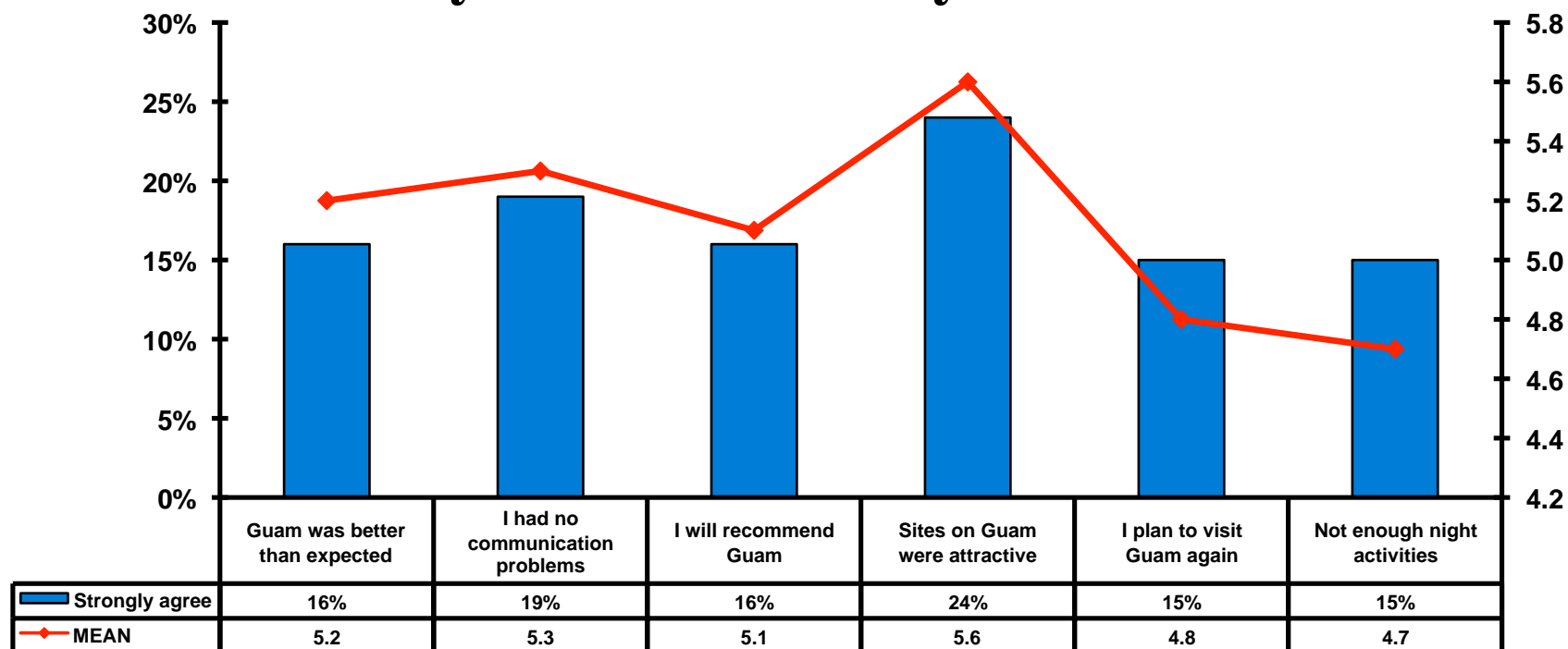
# What would it take to make you want to stay an extra day on Guam?



# On-Island Perceptions

7pt Rating Scale

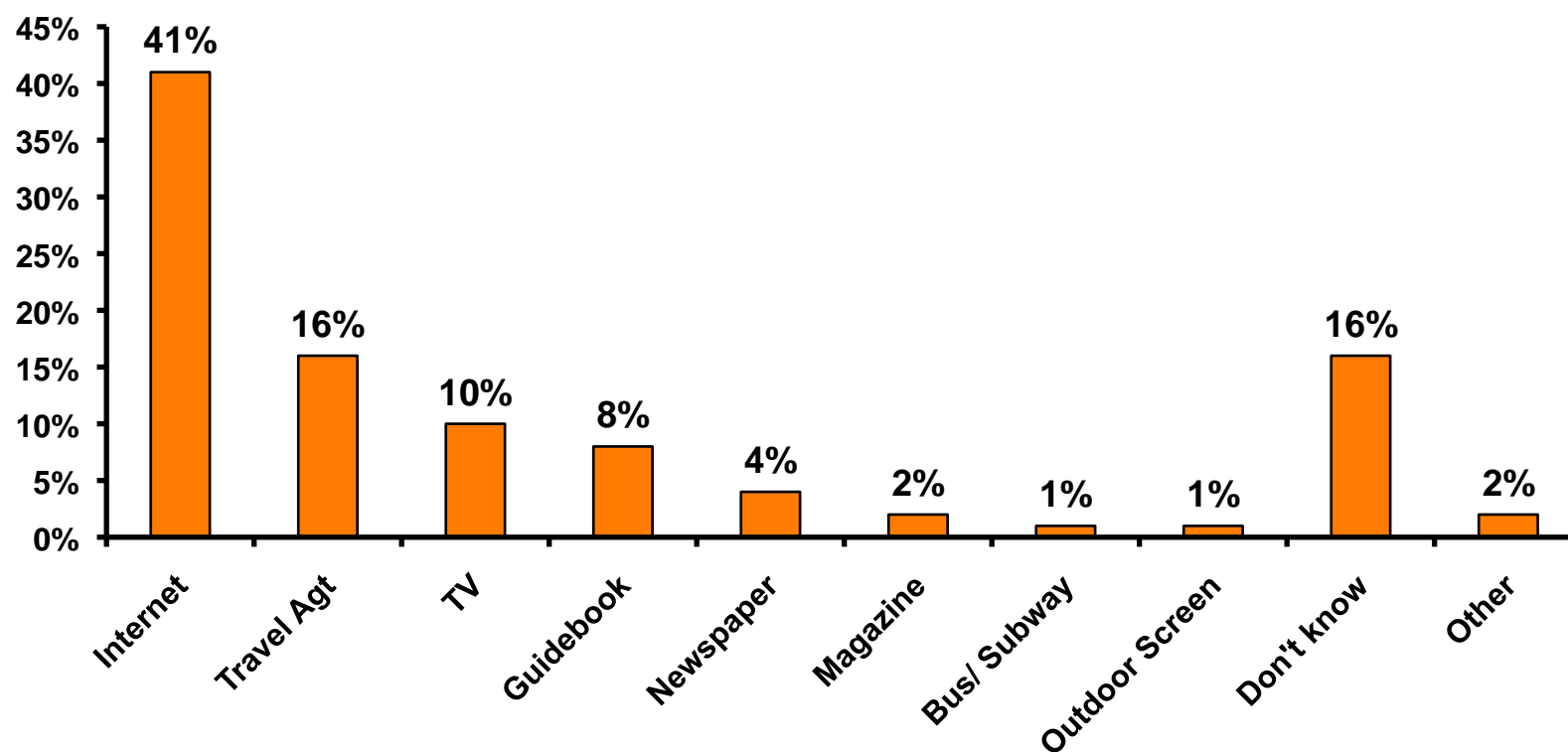
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

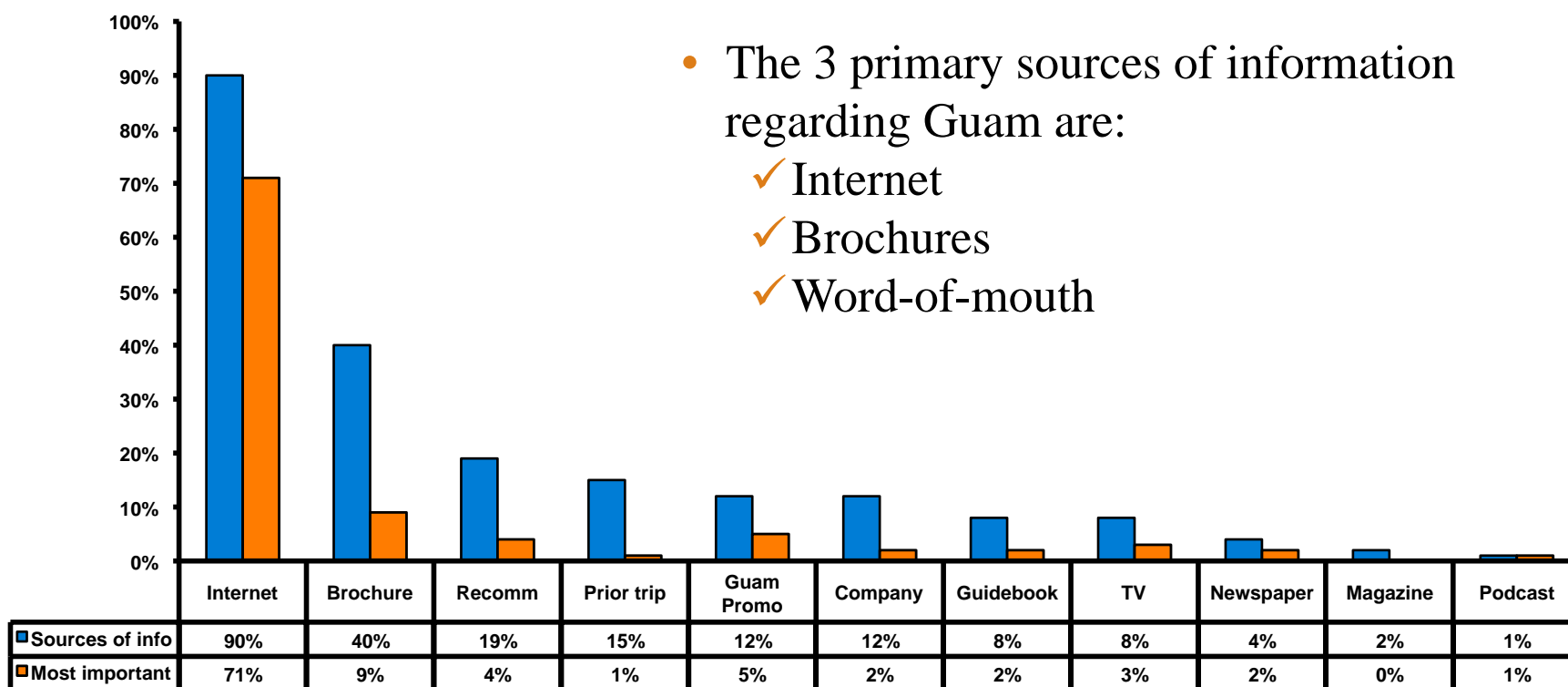
# Guam Promotion - Media

## Past 90 days



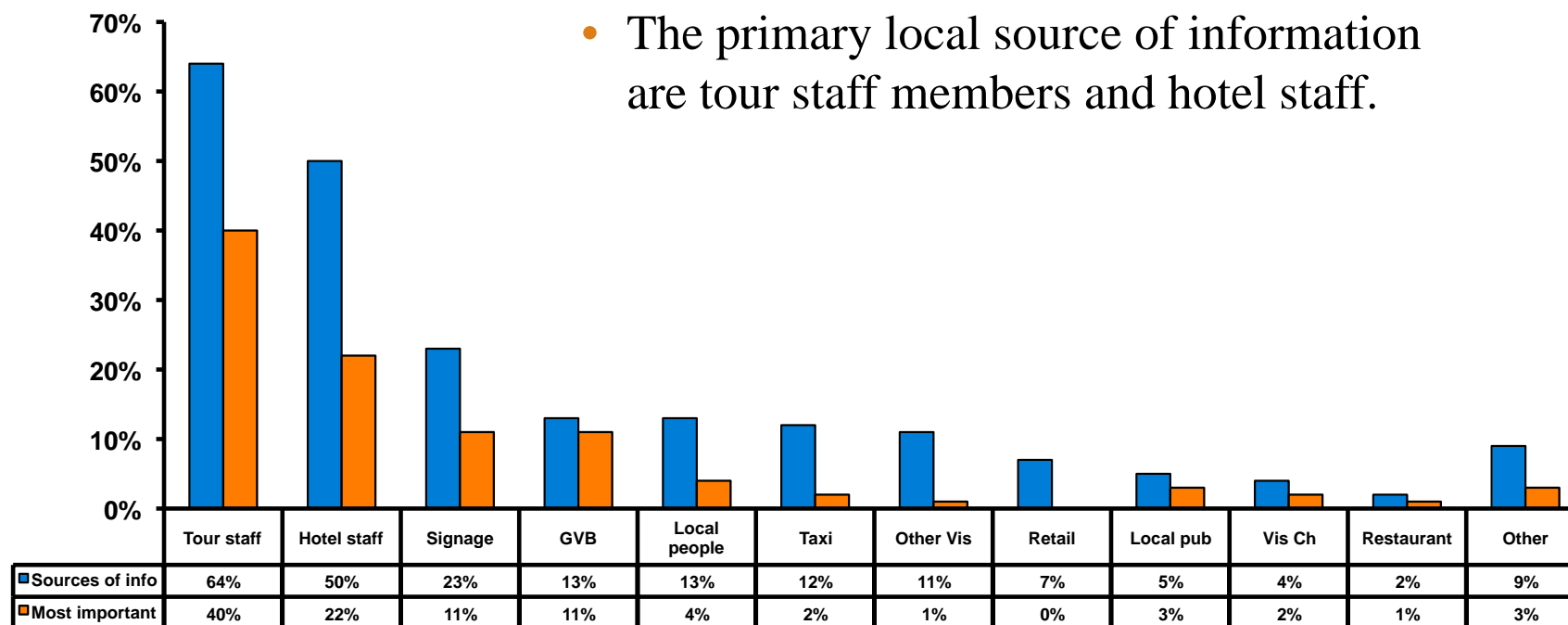


# Sources of Information Pre-arrival



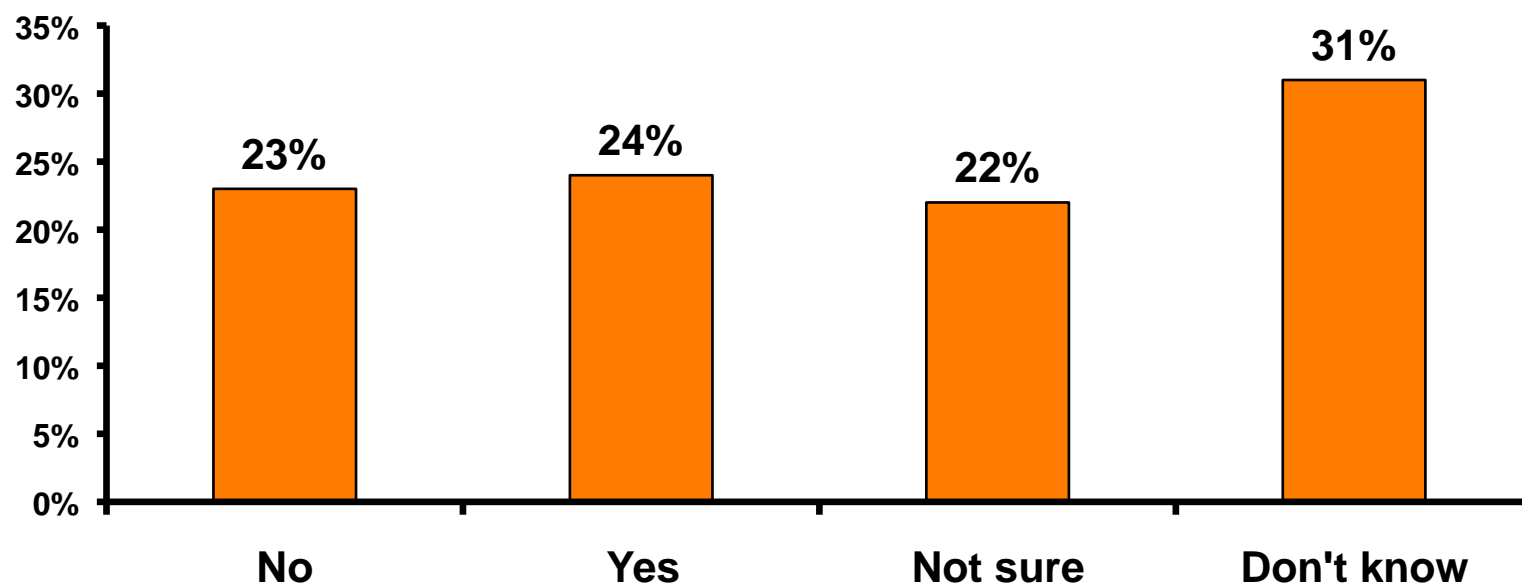
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

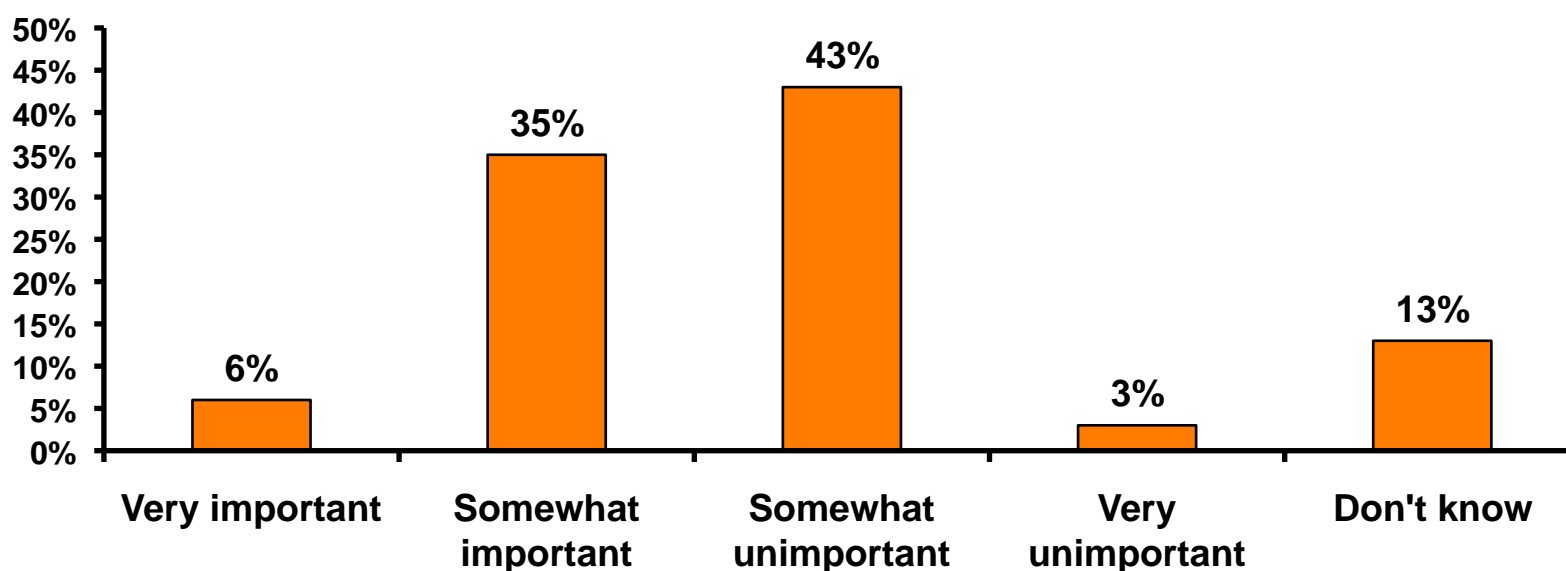
## Good time to spend money on travel outside of Korea - Overall



# Good time to spend money on travel outside of Korea by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No		14%	29%	19%		7%	30%	20%	21%	33%
	Yes	50%	35%	20%	28%	8%	29%	20%	24%	29%	
	Not sure		17%	21%	23%	62%	43%	25%	18%	22%	
	Do not know	50%	33%	30%	30%	31%	21%	26%	38%	28%	67%
Total	Count	2	69	184	86	13	14	97	95	131	3

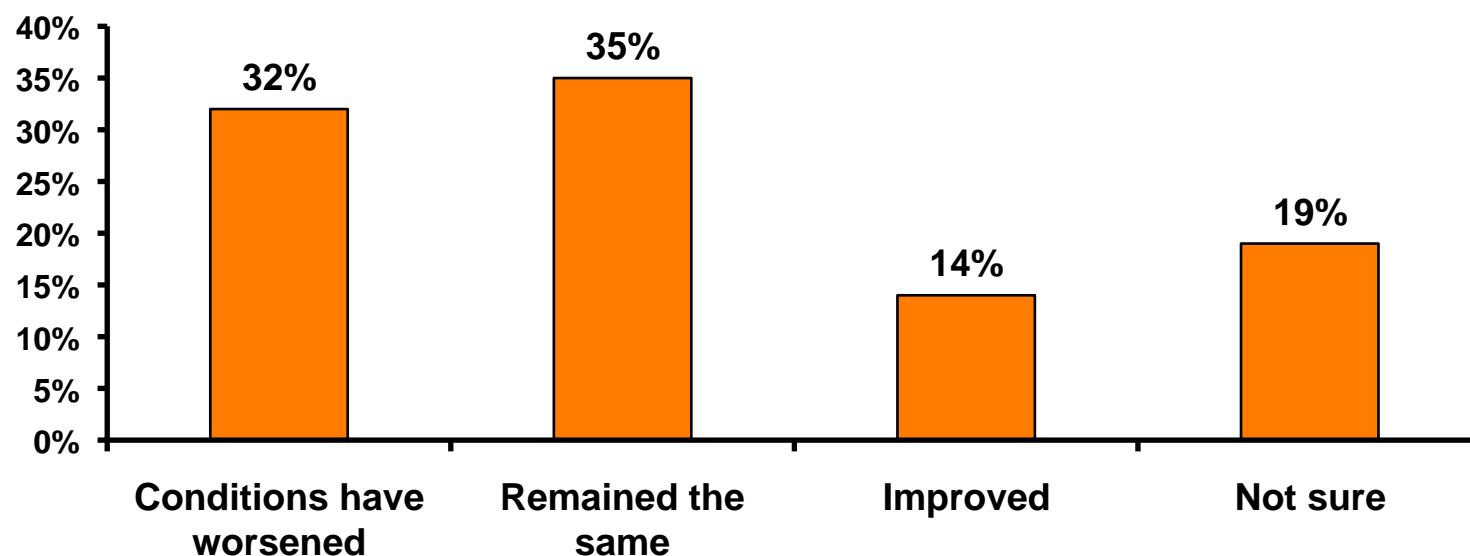
# The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



# The importance of the state of the Korean economy in decision to travel outside of Korea by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.23	Very unimportant		4%	1%	8%			1%	3%	6%	
	Somewhat unimportant		45%	45%	40%	23%	21%	45%	43%	45%	
	Somewhat important		33%	33%	40%	46%	71%	32%	36%	34%	67%
	Very important	50%	7%	5%	5%	15%		6%	5%	8%	
	Don't know	50%	10%	16%	7%	15%	7%	15%	13%	8%	33%
Total	Count	2	69	184	85	13	14	97	95	130	3

# Rating Korean Economy Compared to 12 months ago

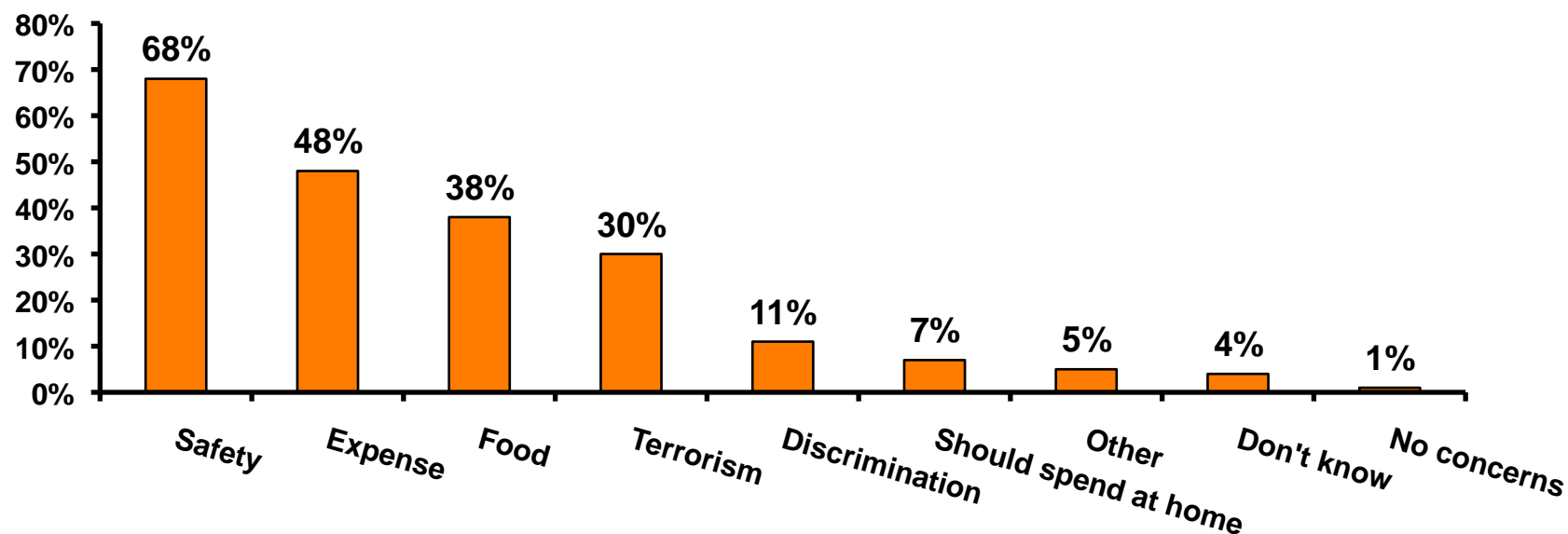




# Rating Korean Economy Compared to 12 months ago by Age & Income

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.21	Conditions have worsened	50%	30%	39%	20%	31%	43%	37%	31%	29%	67%
	Conditions have remained the same		26%	32%	50%	31%	21%	32%	40%	39%	
	Conditions have improved		19%	11%	15%	8%	21%	12%	12%	16%	
	Do not know	50%	25%	17%	15%	31%	14%	19%	18%	16%	33%
Total	Count	2	69	184	86	13	14	97	95	131	3

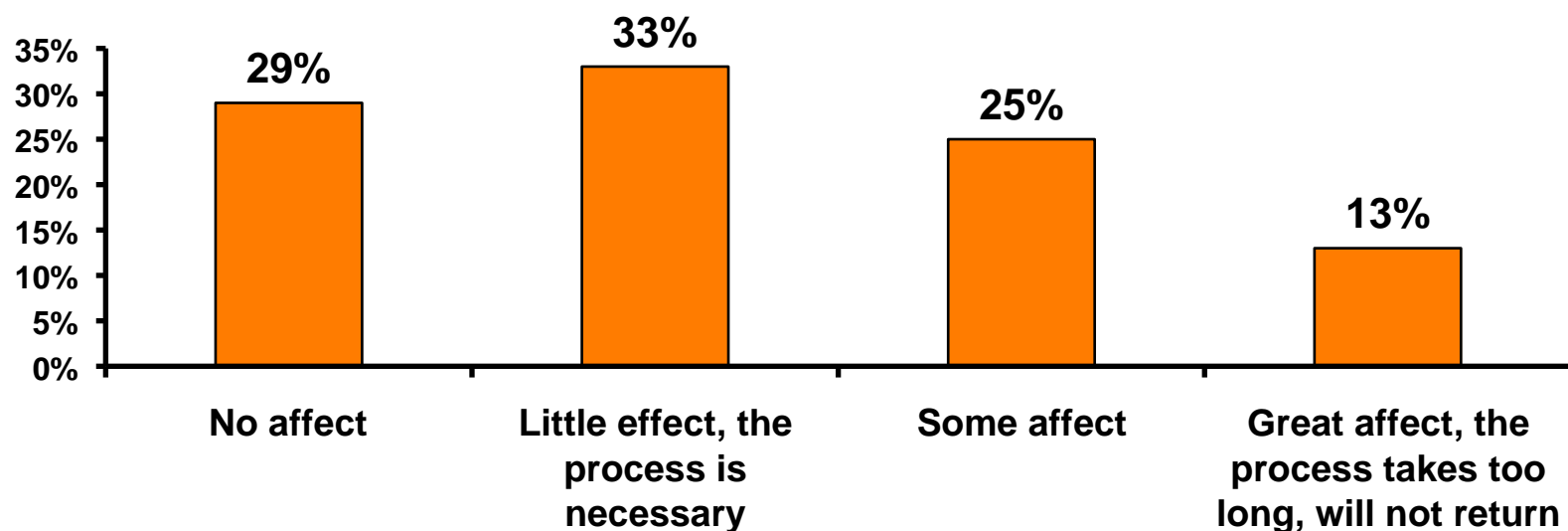
# Concerns about travel outside of Korea - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.24	Safety at my destination		64%	69%	74%	69%	79%	64%	65%	75%	100%
	Expense	50%	45%	51%	45%	46%	21%	51%	52%	45%	100%
	Food		29%	36%	53%	15%	29%	29%	48%	37%	67%
	Terrorism		36%	29%	31%	15%	43%	23%	28%	36%	33%
	Spending money abroad when it should be spent at home	50%	9%	7%	7%	8%	14%	10%	6%	6%	
	Other		6%	4%	5%	15%	7%	3%	6%	5%	
	Do not know	100%	3%	4%	2%			4%	3%	3%	
	No concerns		3%	1%	1%			3%		2%	
Total	Cases	2	69	181	86	13	14	96	94	130	3

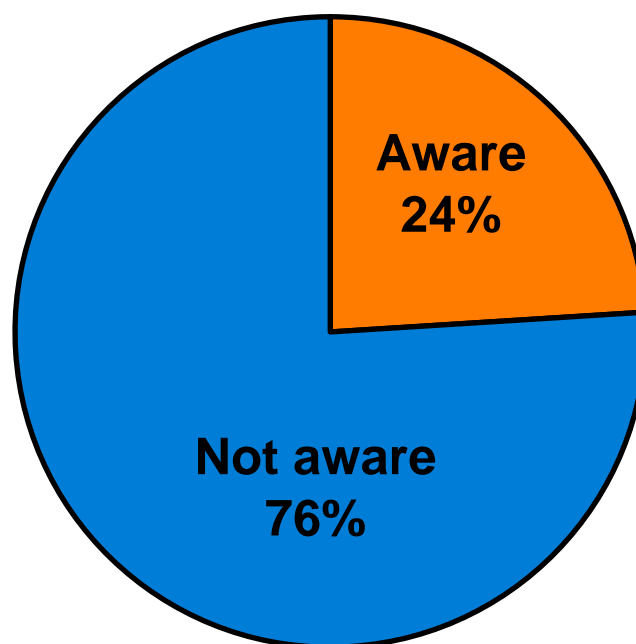
# Security Screening/ Immigration Process at Guam International Airport



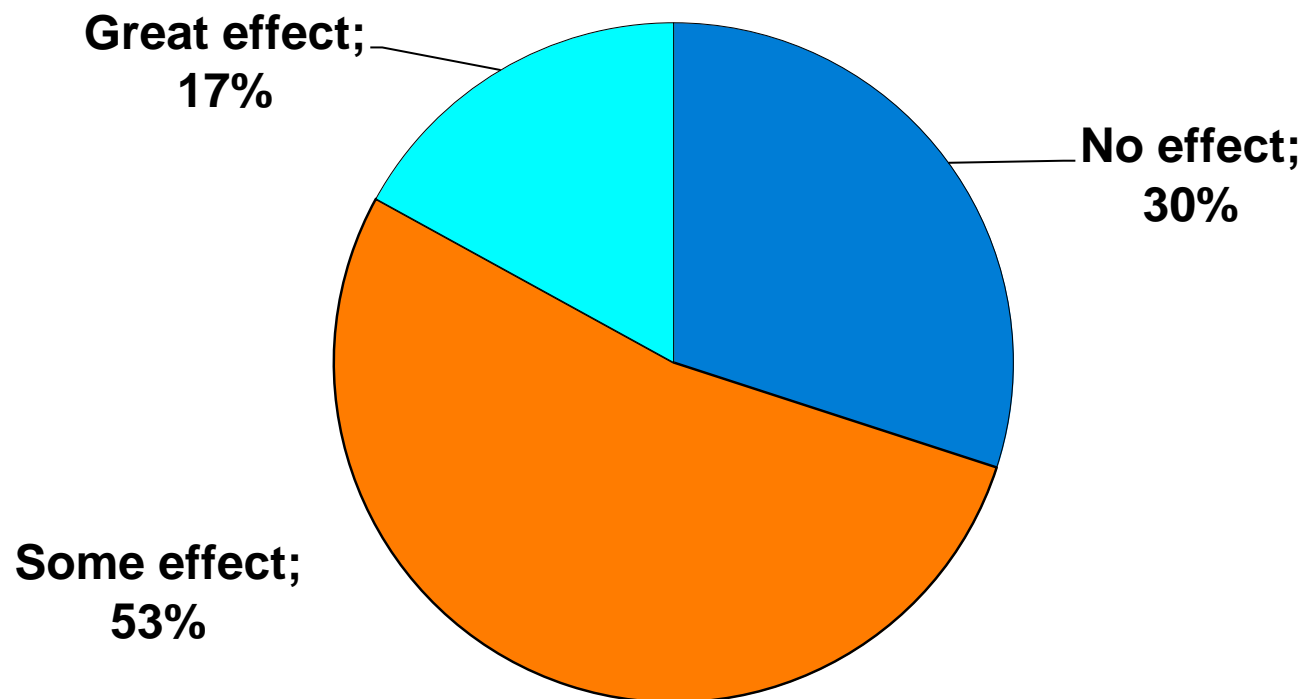
## **Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum**

- Mean Rating – **3.2** out of possible 7.0
- Agree (Score 6-7) – **9%**
- Neutral (Score 4-5) – **46%**
- Disagree (Score 1-3) – **45%**

## Awareness of U.S. Military troops moving from Japan to Guam



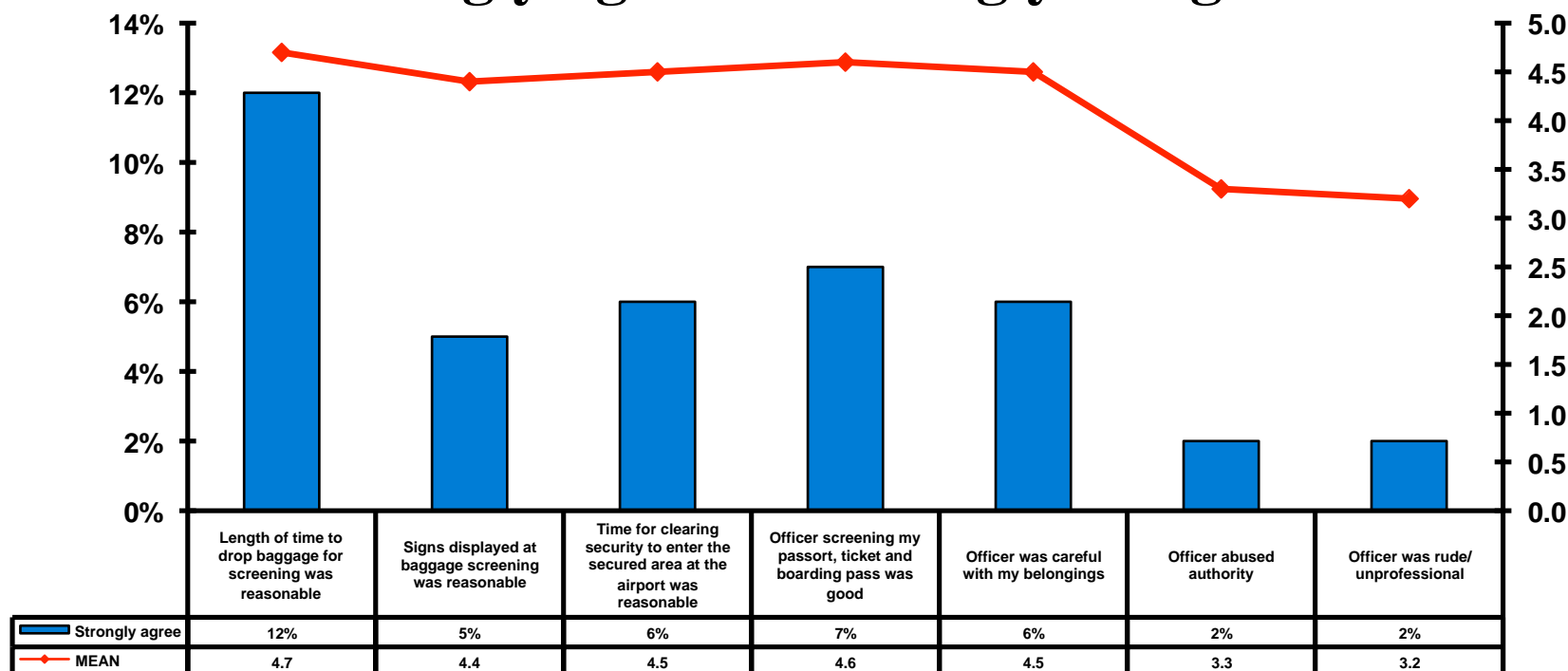
## Effects of U.S. Military troop movement on future trips to Guam



# Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree





# Likelihood of travel outside of Korea within the next 6 to 24 months

