



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **SEPTEMBER 2012**



**Prepared by: QMark Research**

*Information contained herein is the property of the Guam Visitors Bureau.*

*The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.*

# Background & Methodology

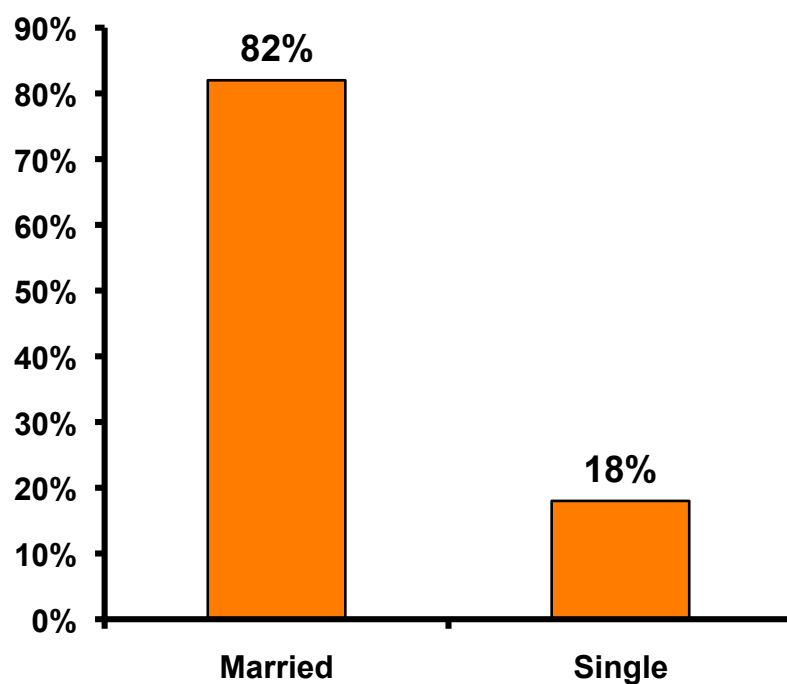
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Korean 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 +/- 5.2 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.

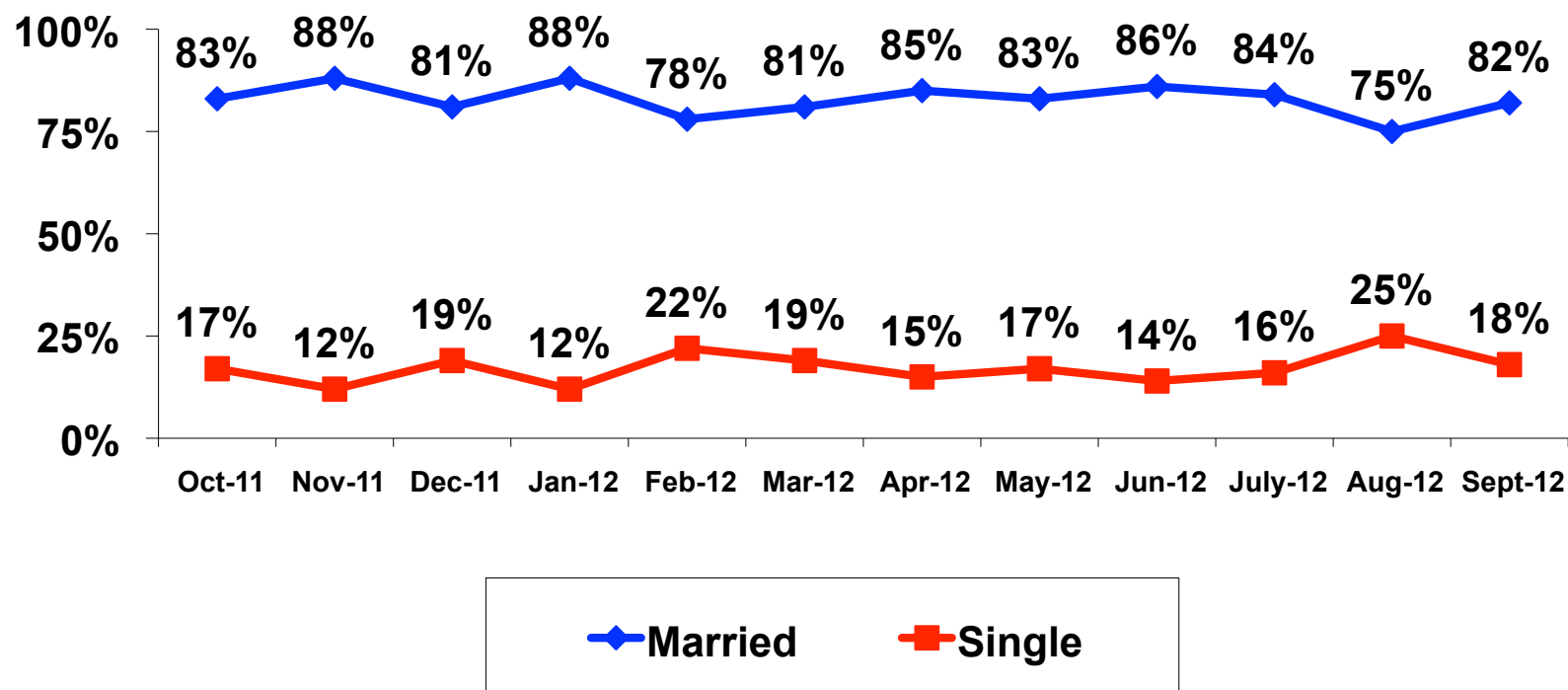
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

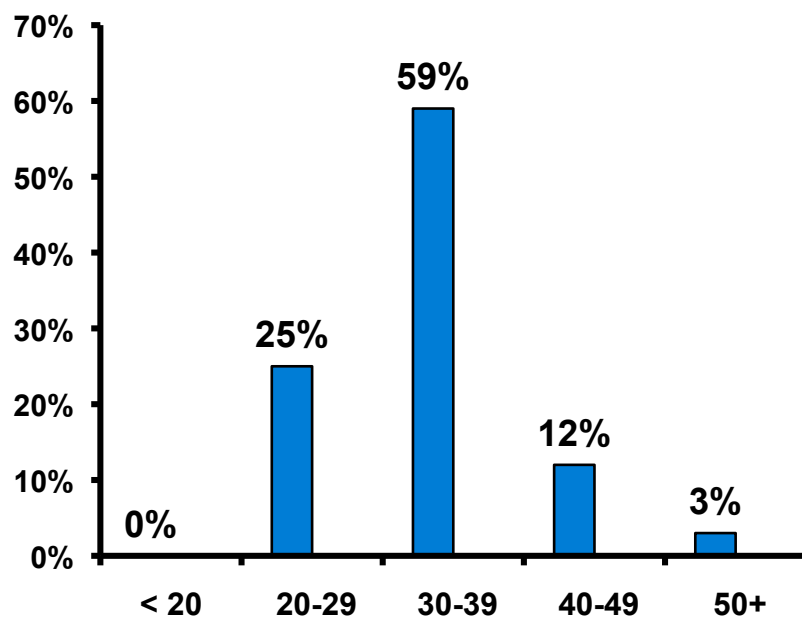


- A majority of visitors are married.

# Marital Status

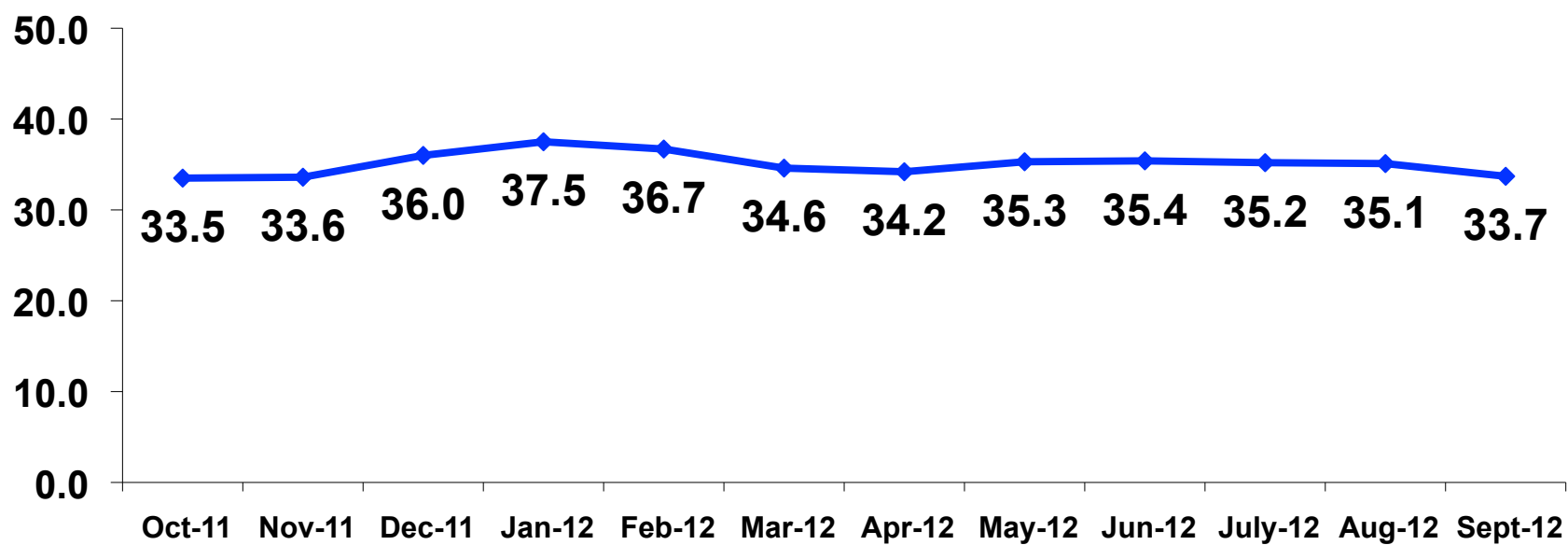


# Age - Overall



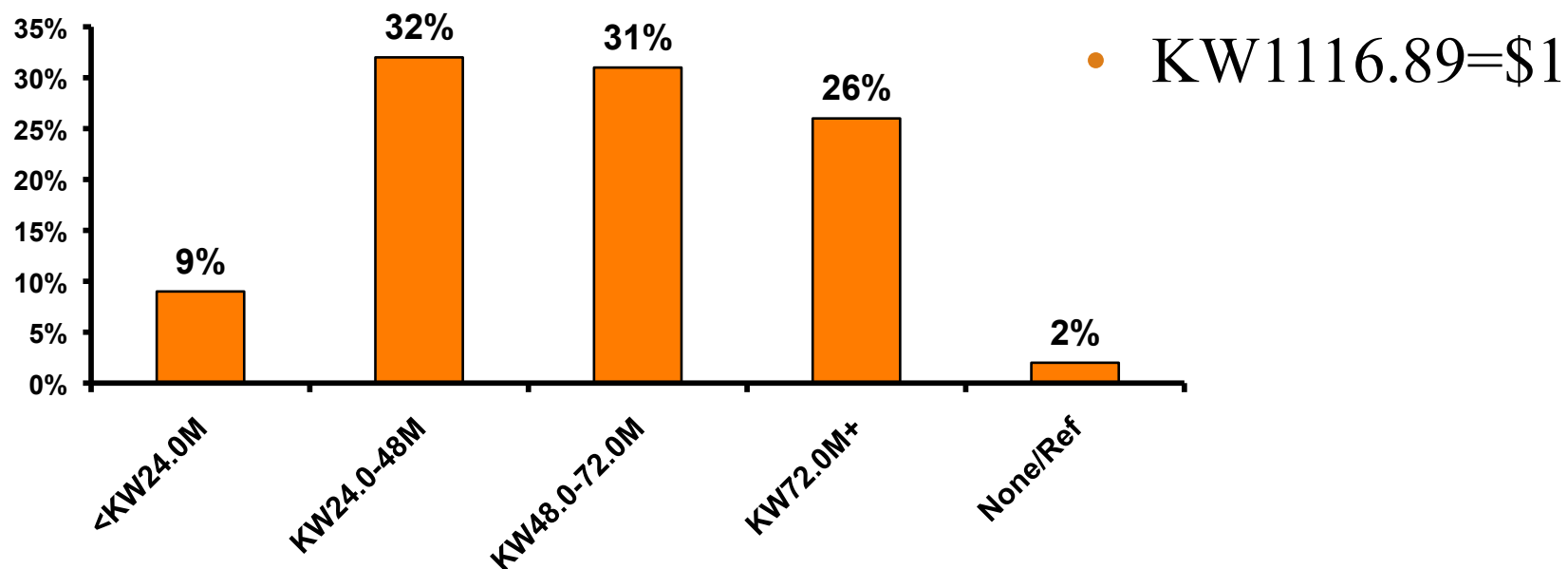
- The average age of the respondents is 33.7 years of age.

# Average Age

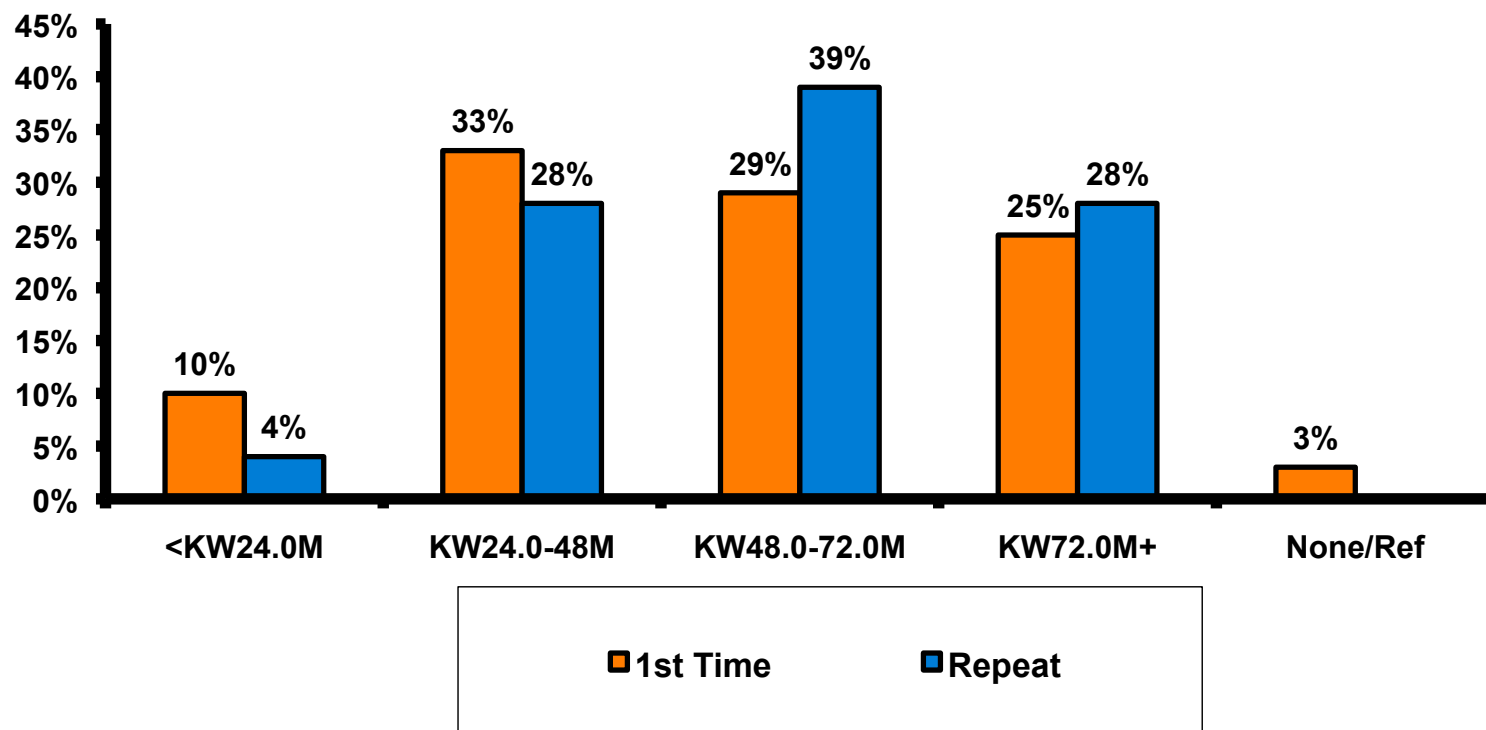




# Personal Income



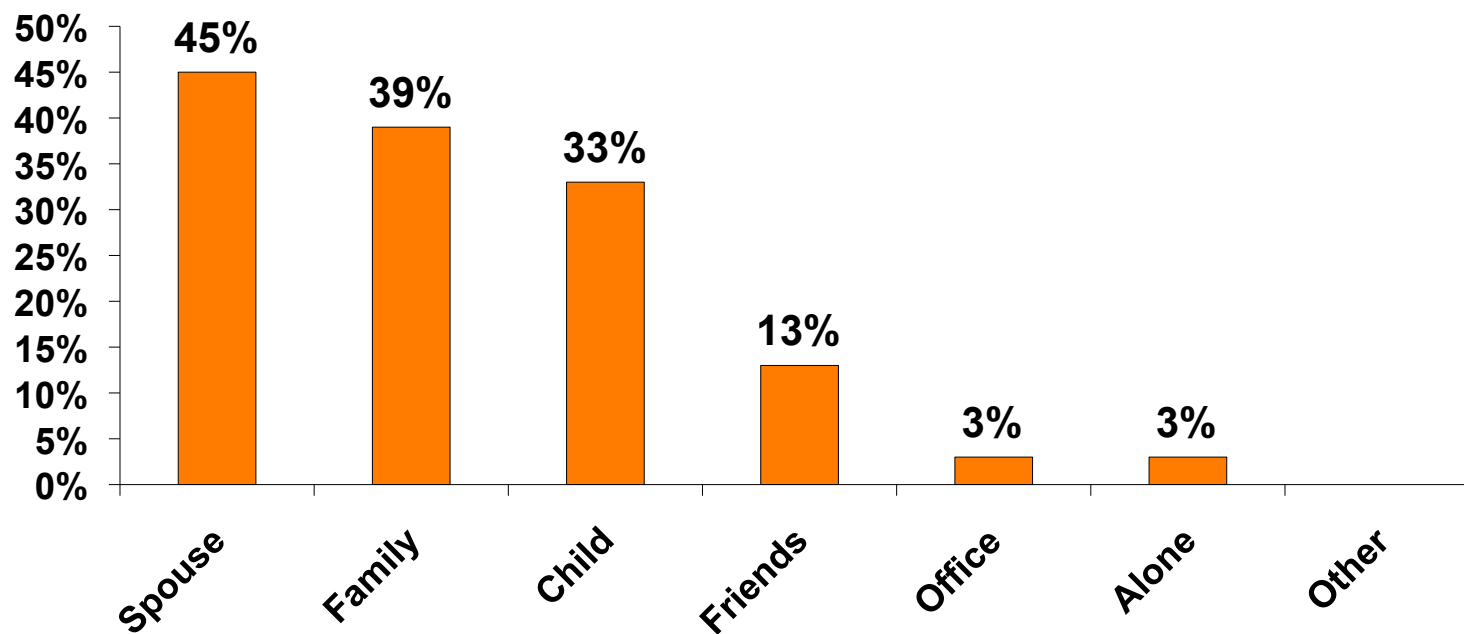
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	32	12	20		19	13		
			10%	7%	13%		22%	7%		
	KW24.0M-KW48.0M	Count	106	58	48		44	57	4	1
			32%	34%	30%		51%	30%	10%	9%
	KW48.0M-KW72.0M	Count	100	45	55		14	67	14	4
			30%	26%	34%		16%	35%	34%	36%
	KW72.0M+	Count	85	52	33	1	9	48	23	4
			26%	30%	21%	100%	10%	25%	56%	36%
	Refused	Count	8	4	4			6		2
			2%	2%	3%			3%		18%
Total	Count	331	171	160	1	86	191	41	11	

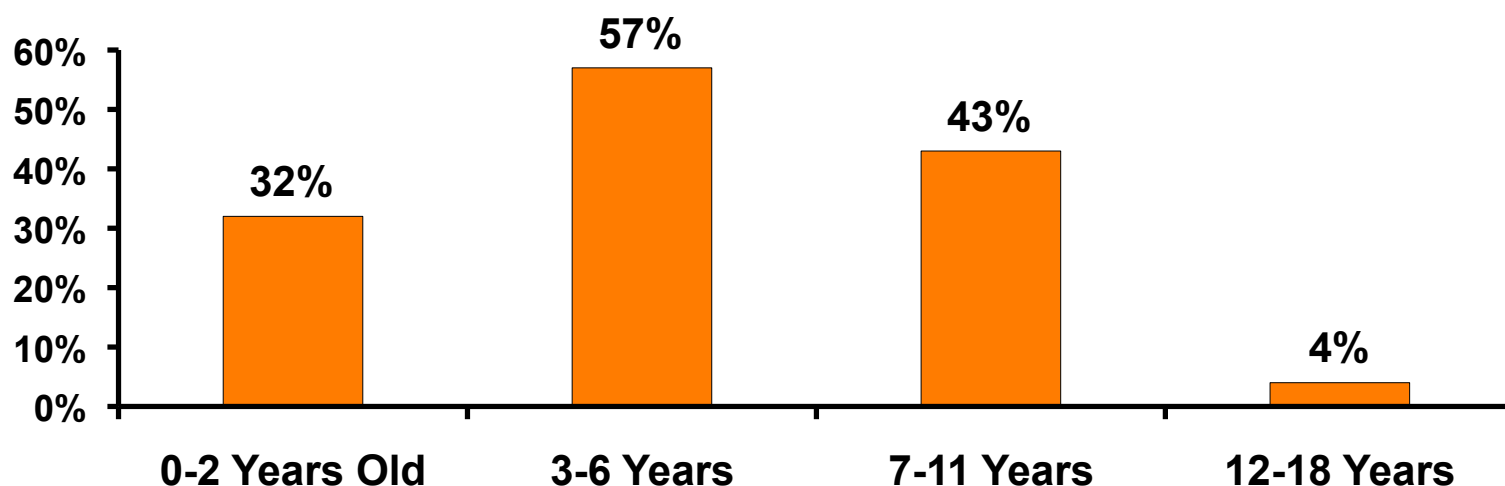
# Travel Companions



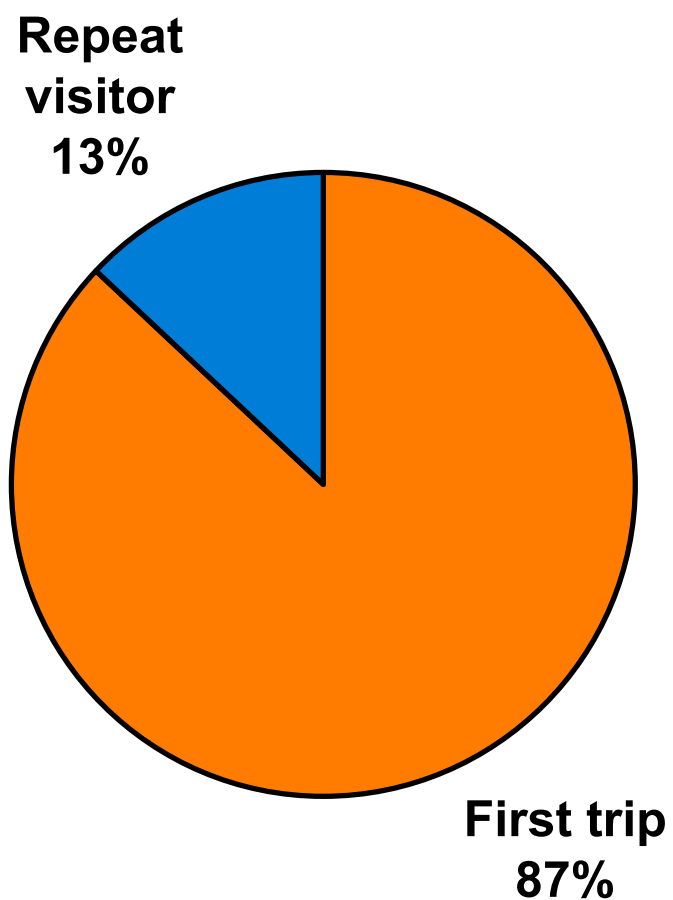
# Number of Children Travel Party

N=117 total respondents traveling with children.

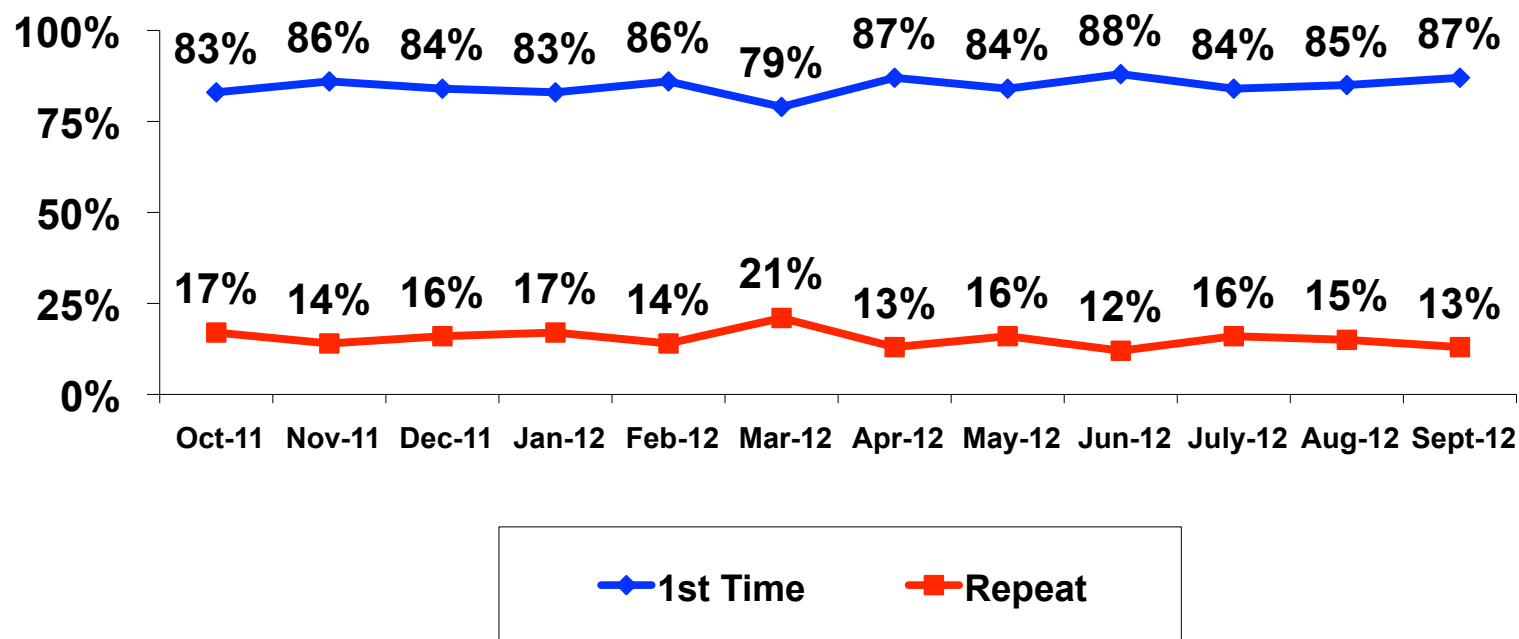
(Of those N=117 respondents, there is a total of 181 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips To Guam



# Trips to Guam by Age & Gender

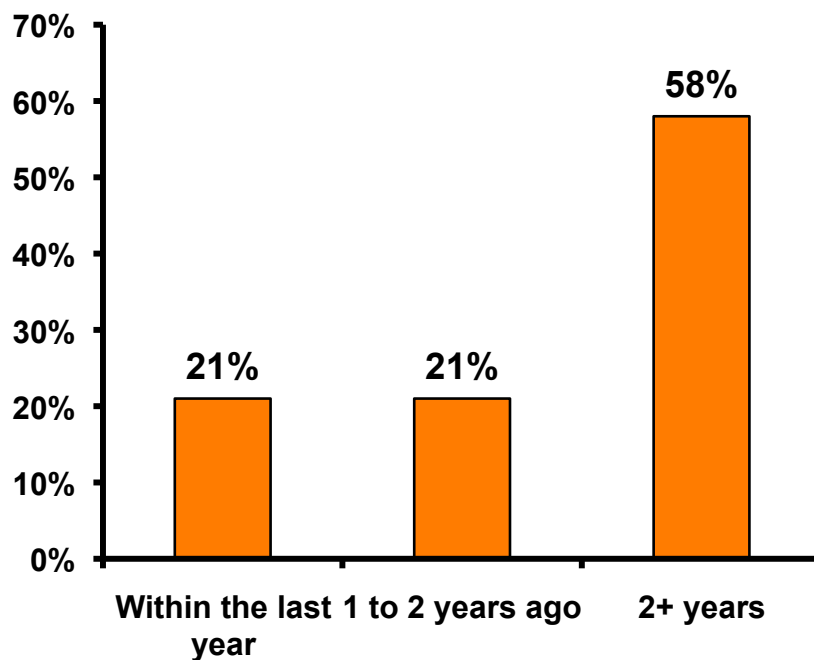
			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	177	155	21
			51%	51%	48%
	Female	Count	173	150	23
			49%	49%	52%
Total	Count		350	305	44
AGE	<20	Count	1	1	
			0%	0%	
	20-29	Count	88	82	6
			25%	27%	14%
	30-39	Count	207	179	27
			59%	59%	63%
	40-49	Count	41	33	8
			12%	11%	19%
	50+	Count	12	10	2
			3%	3%	5%
Total	Count		349	305	43

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



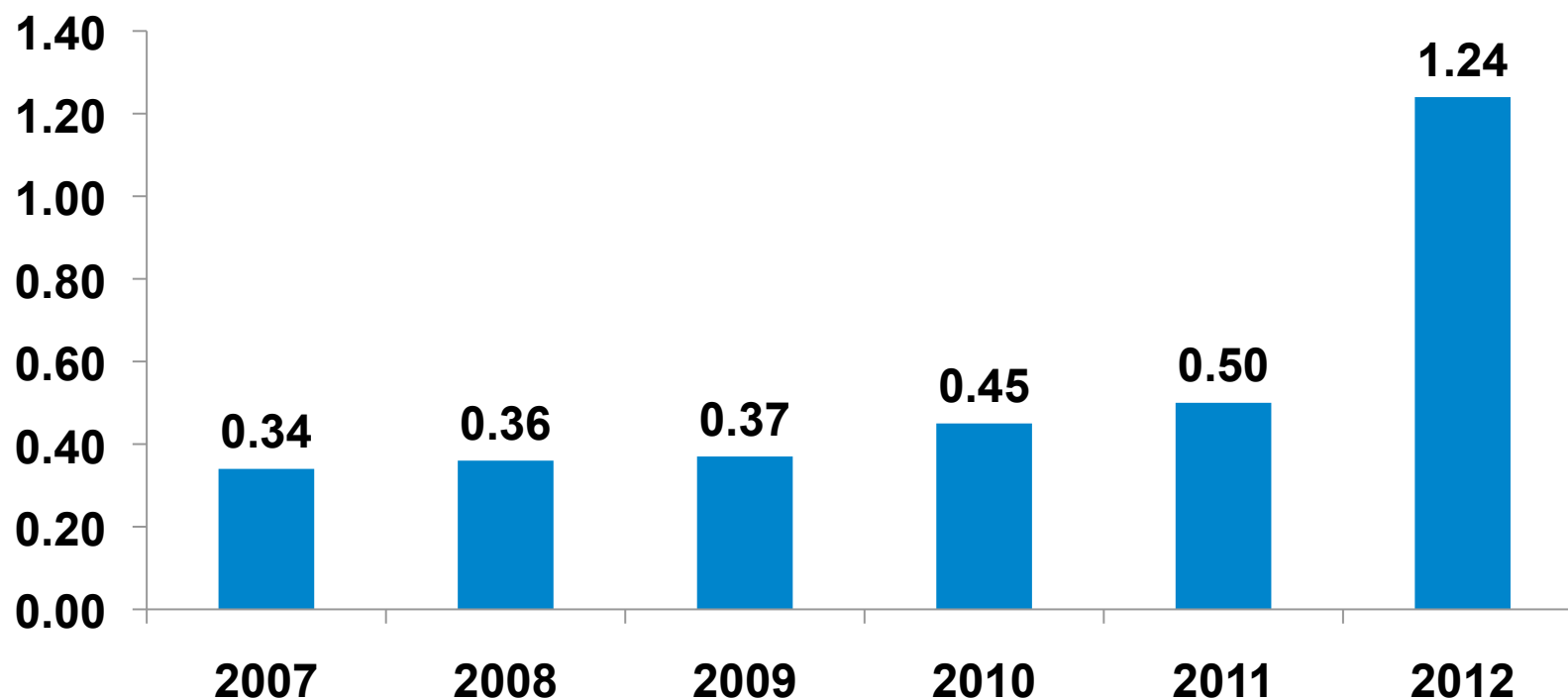
# Repeat Visitors Last Trip

n = 43



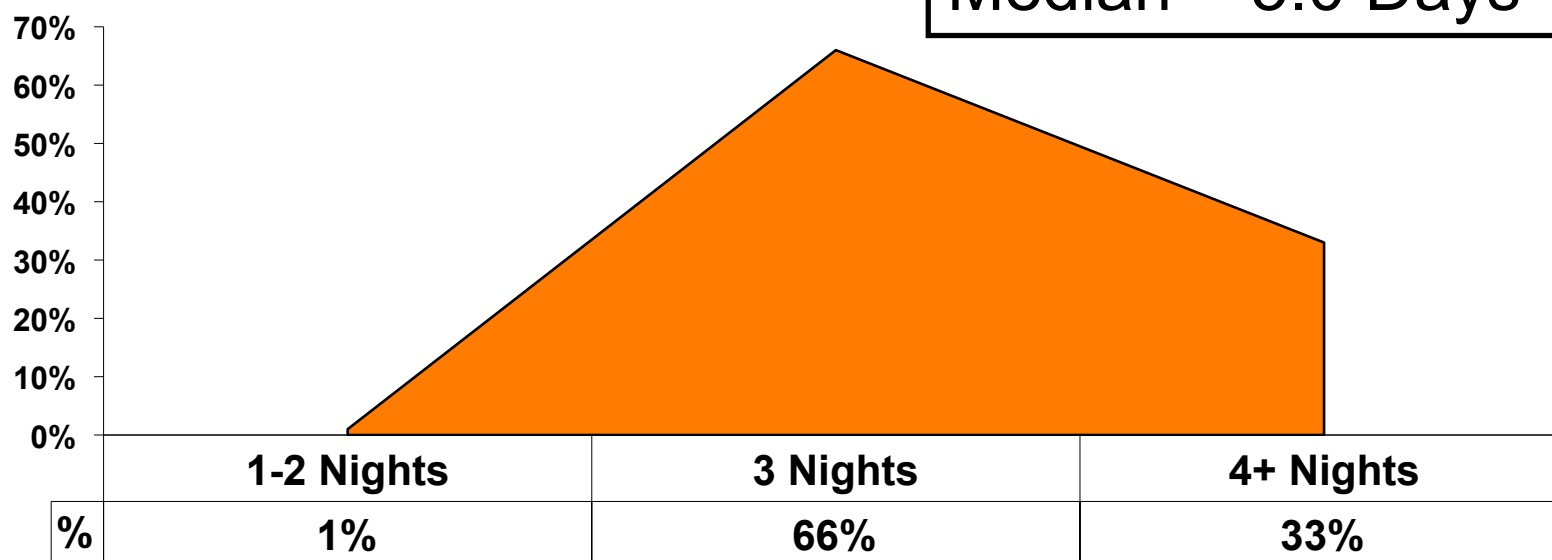
- The average repeat visitor has been to Guam 2.9 times.
- 42% of the repeat visitors have been to Guam within the last 2 years.

## Average Number Overnight Trips (2006-2012) (2 nights or more)

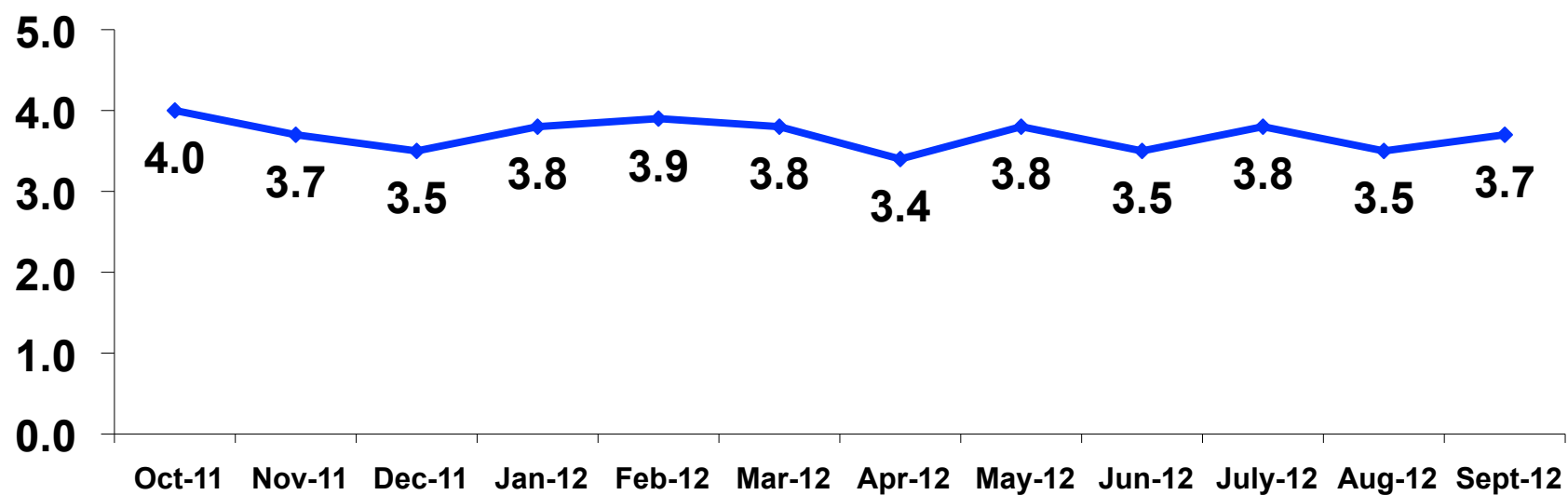


# Length of Stay

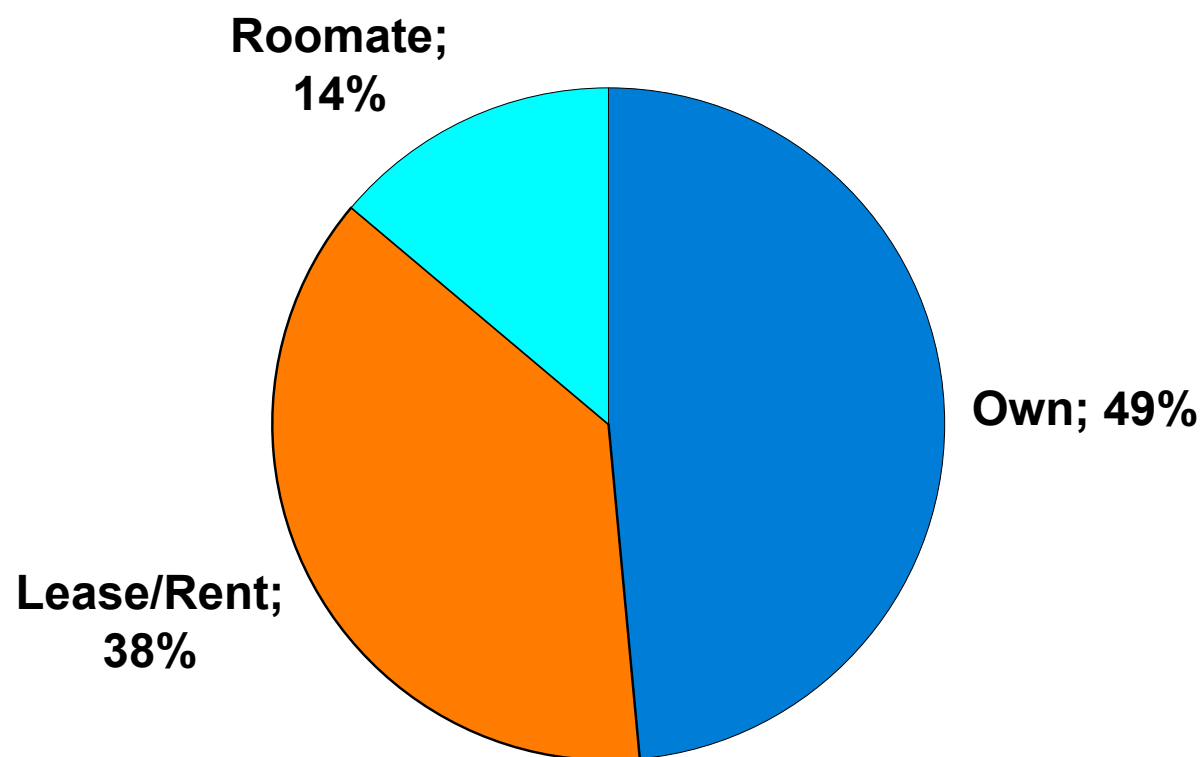
Mean = 3.70 Days  
Median = 3.0 Days



# Average Length of Stay



# Living Accommodations

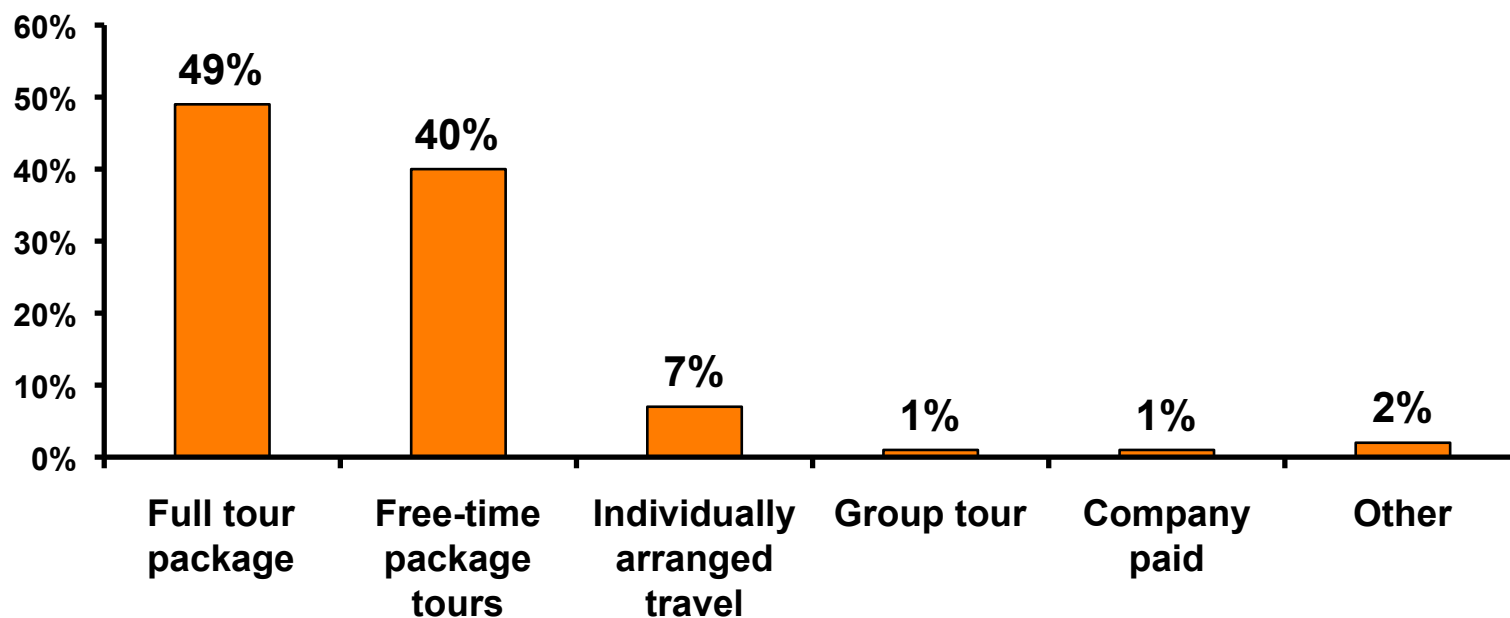


# Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	36%	29%	41%	33%	38%	13%
	Prof/Specialist/Tech	16%	13%	21%	12%	18%	13%
	Homemaker	13%	10%	7%	18%	9%	25%
	Self-employed	10%	6%	5%	13%	12%	25%
	Service worker	5%	10%	5%	5%	5%	
	Manager	3%		4%	4%	5%	
	Professor/Teacher	3%	10%	1%	4%	4%	
	Govt-Mgr	3%	3%	5%	2%	2%	
	Other	3%	6%	3%	3%	1%	
	Unemployed	2%			1%	2%	25%
	Skilled worker	1%		4%	1%		
	Student	1%	10%	1%		1%	
	Judicial	1%		3%		2%	
	Sales/Clerical	1%		3%	1%		
	Free-lancer	1%	3%		1%	1%	
	Govt - Office/non-mgr	0%			1%		
	Govt-Exec	0%			1%		
Total	Count	345	31	106	100	85	8

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall



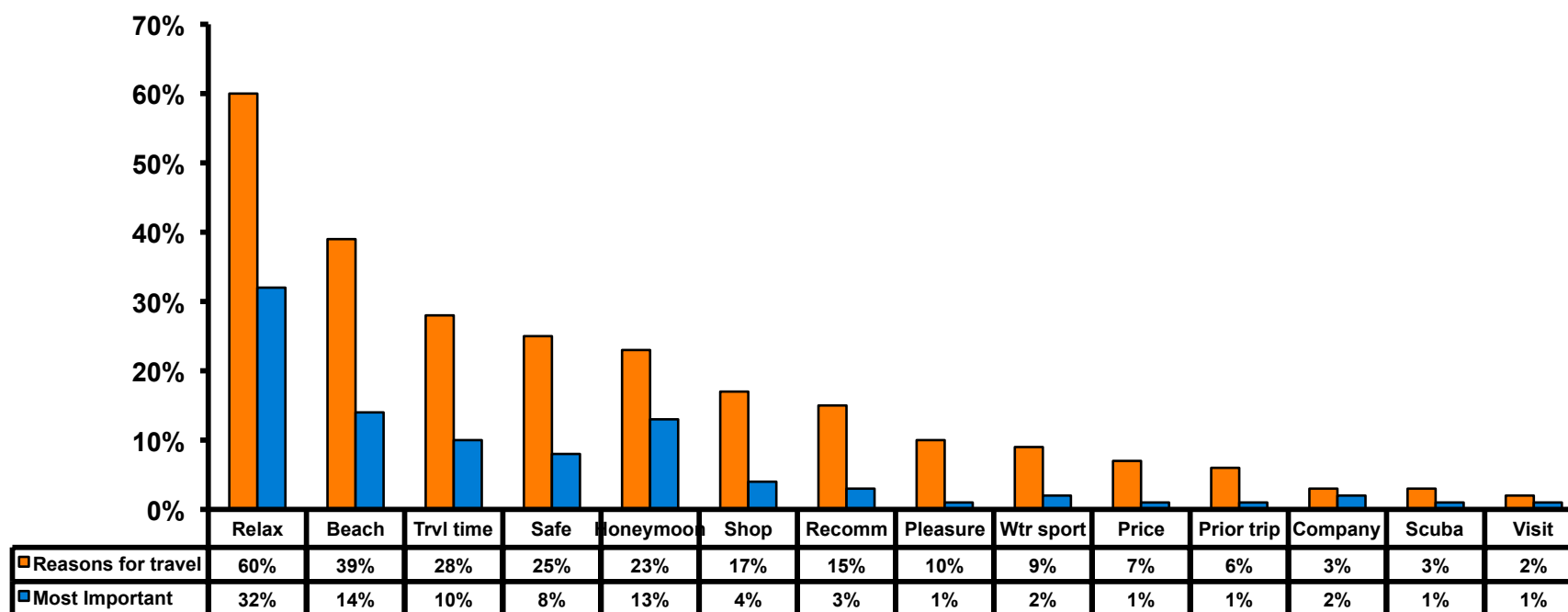


# Accommodation by Income

Average length of stay: 3.70 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	47%	28%	32%	59%	54%	63%
	Hyatt Regency Guam	14%	16%	21%	7%	12%	13%
	Sheraton Laguna Resort	12%	31%	14%	7%	7%	13%
	Hotel Nikko Guam	7%	16%	6%	7%	8%	
	The Westin Resort Guam	4%		5%	5%	5%	
	Hilton Guam Resort & Spa	4%	3%	5%	5%	4%	
	Holiday Resort Guam	3%		5%	2%	5%	
	Onward Beach Resort	3%		5%	4%	1%	
	Outrigger Guam Resort	3%	3%	4%	2%	2%	
	Hotel Sane Fe	1%		5%			
	Bayview Hotel	1%	3%		1%		
	Condominium	0%				1%	
	Apartment	0%			1%		
	Relatives, Friends, Home Stay	0%					13%
	Days Inn Tamuning	0%				1%	
	Ramada Suites Guam	0%					
Total	Count	350	32	106	100	85	8

# Travel Motivation - Top Responses



# Most Important Reason for Choosing Guam

- The desire to relax,
- Guam's natural beauty/ beaches and
- Honeymoon

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	60%	100%	58%	57%	71%	67%	57%	62%
	Beautiful seas, beaches, tropical climate	39%		35%	41%	39%	50%	37%	42%
	Short travel time	28%		35%	29%	15%	8%	25%	31%
	It is a safe place to spend a vacation	25%		28%	23%	32%	8%	24%	25%
	Honeymoon	23%		38%	21%	7%		26%	19%
	Shopping	17%		17%	20%	7%		14%	20%
	Recommendation of friend, relative, travel agency	15%		13%	17%	12%	17%	14%	16%
	Pleasure	10%		7%	12%	7%	8%	11%	9%
	Water sports	9%		7%	9%	12%	25%	8%	11%
	Price of the tour package	7%		8%	7%	7%	8%	9%	6%
	A previous visit	6%		1%	8%	7%	8%	5%	8%
	Company or Business trip	3%		2%	3%	2%	8%	5%	2%
	SCUBA diving	3%		2%	3%	2%	8%	4%	2%
	Other	3%		3%	2%	5%		2%	3%
	To visit friends or relatives	2%		3%	0%	2%	25%	2%	2%
	Organized Sporting Activity	2%		3%	2%		8%	2%	2%
	My company sponsored me	2%			1%	10%		2%	2%
	Promotional materials from GVB	2%		1%	2%			1%	2%
	To get married or Attend wedding	2%		3%	1%	2%		2%	1%
	To golf	1%	100%		0%			1%	1%
	Special promotion	1%	100%		0%			1%	1%
	Career certification or testing	0%			0%				1%
Total	Cases	350	1	88	207	41	12	177	173

# Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	60%	59%	54%	69%	56%	50%
	Beautiful seas, beaches, tropical climate	39%	44%	35%	44%	40%	38%
	Short travel time	28%	22%	30%	25%	28%	50%
	It is a safe place to spend a vacation	25%	25%	19%	34%	25%	13%
	Honeymoon	23%	31%	42%	11%	8%	25%
	Shopping	17%	9%	21%	22%	11%	25%
	Recommendation of friend, relative, travel agency	15%	22%	10%	15%	16%	13%
	Pleasure	10%	13%	8%	9%	14%	
	Water sports	9%	13%	7%	6%	16%	13%
	Price of the tour package	7%	6%	10%	6%	6%	13%
	A previous visit	6%	6%	5%	10%	6%	
	Company or Business trip	3%	3%	5%	2%	4%	
	SCUBA diving	3%	6%	3%	3%	2%	
	Other	3%	6%	1%	4%	2%	
	To visit friends or relatives	2%	6%	1%	2%	1%	25%
	Organized Sporting Activity	2%	3%	2%	3%	2%	
	My company sponsored me	2%				8%	
	Promotional materials from GVB	2%		4%	2%		
	To get married or Attend wedding	2%	3%	1%	2%	2%	
	To golf	1%				2%	
	Special promotion	1%			1%	1%	
	Career certification or testing	0%			1%		
Total	Cases	350	32	106	100	85	8

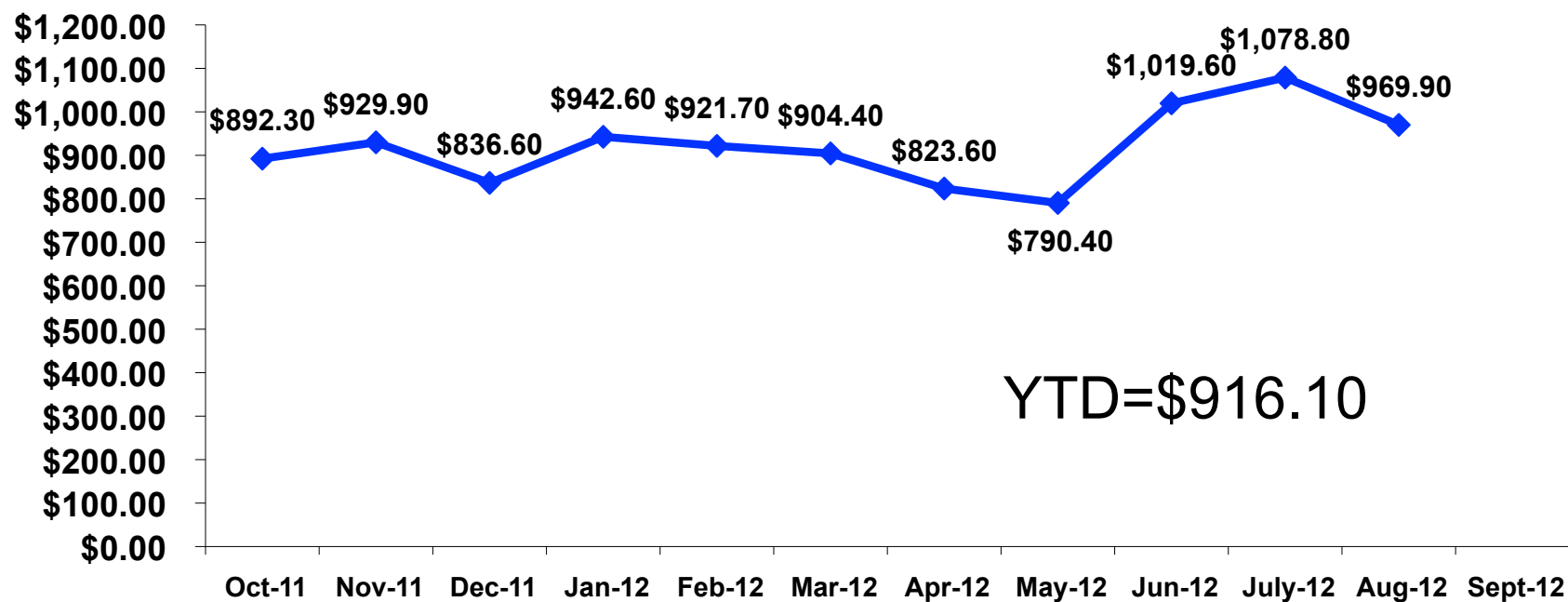
# SECTION 3 **EXPENDITURES**

# Prepaid Expenditures

KW1116.89/US\$1

- \$2,171.40 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$8,953 = maximum (highest amount recorded for the entire sample)
- \$969.90 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person





# **Breakdown of Prepaid Expenditures**

**KW1116.89=\$1**

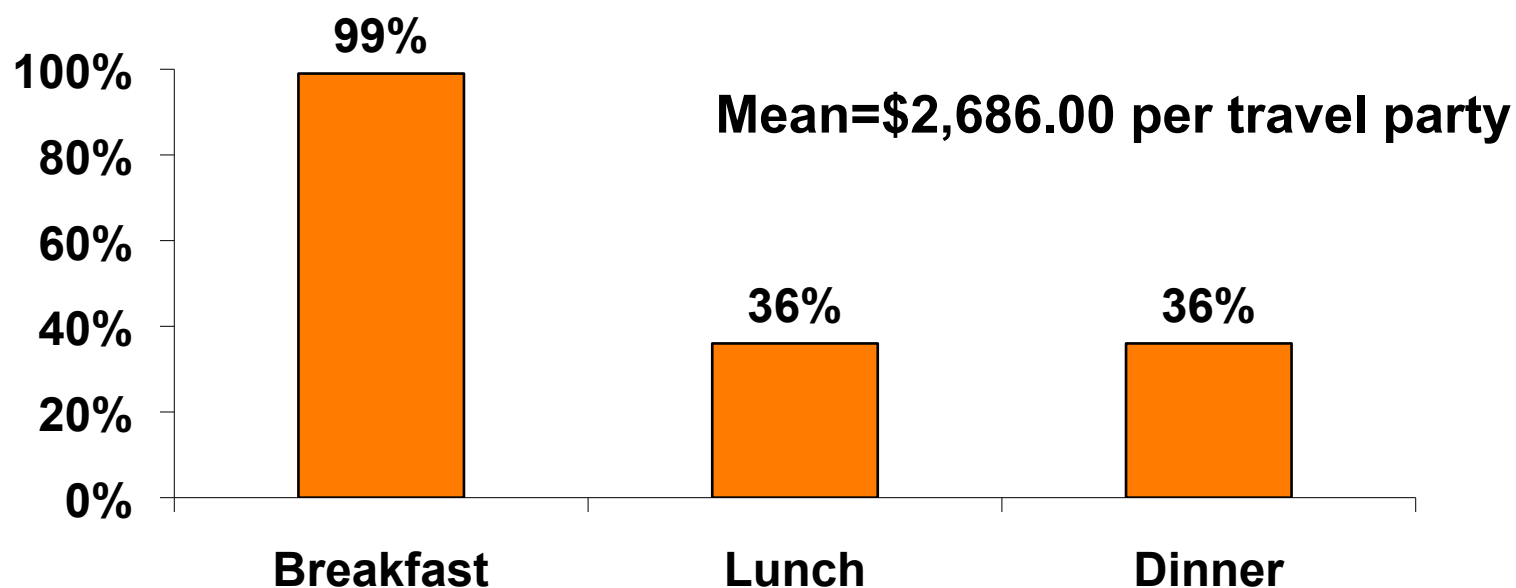
**(Filter: Only those who responded)**

	MEAN \$
Air & Accommodation package only	\$1,934.70
Air & Accommodation w/ daily meal package	\$2,686.00
Air only	\$1,018.50
Accommodation only	\$895.30
Accommodation w/ daily meal only	\$629.70
Food & Beverages in Hotel	\$179.10
Ground transportation – Korea	\$75.80
Ground transportation – Guam	\$180.90
Optional tours/ activities	\$375.10
Other expenses	\$455.20
Total Prepaid	\$2,171.40

# Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

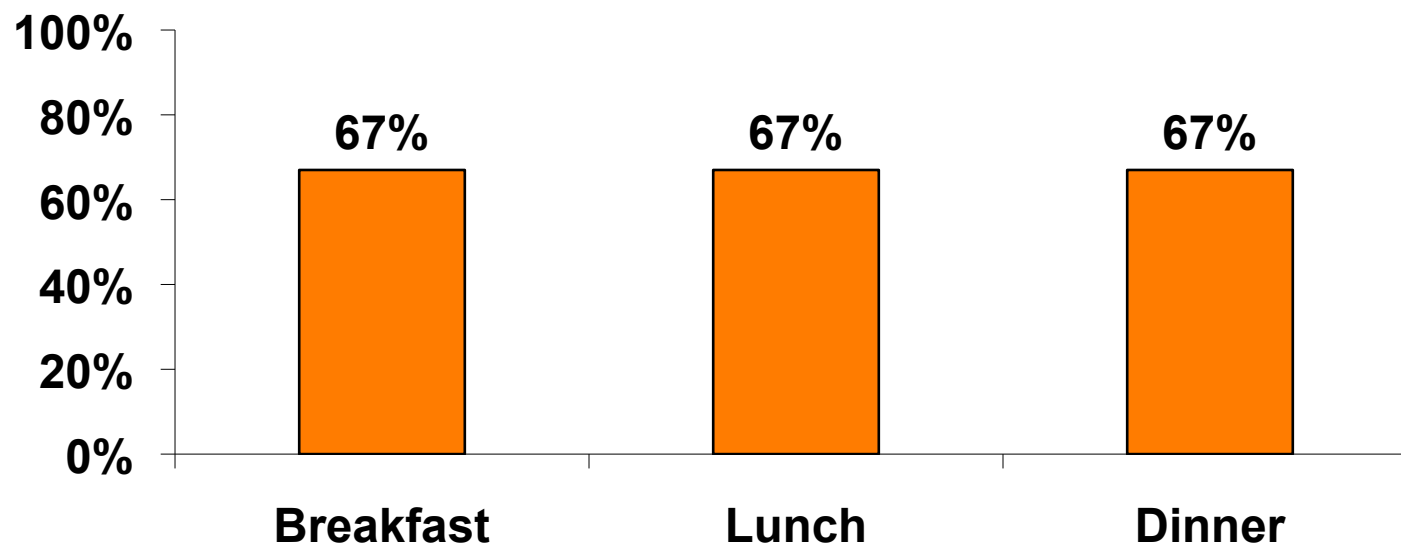
n=221



# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

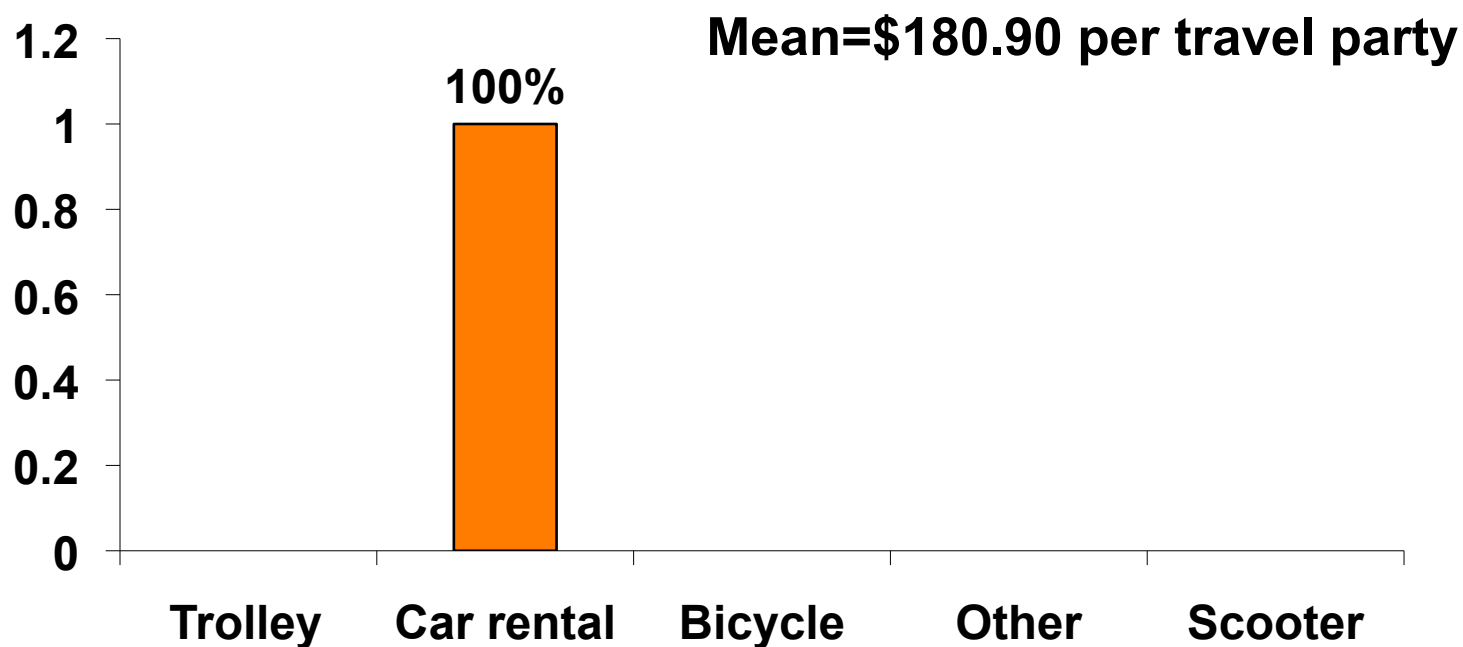
n= 6



Mean= \$629.70 per travel party

## Prepaid Ground Transportation

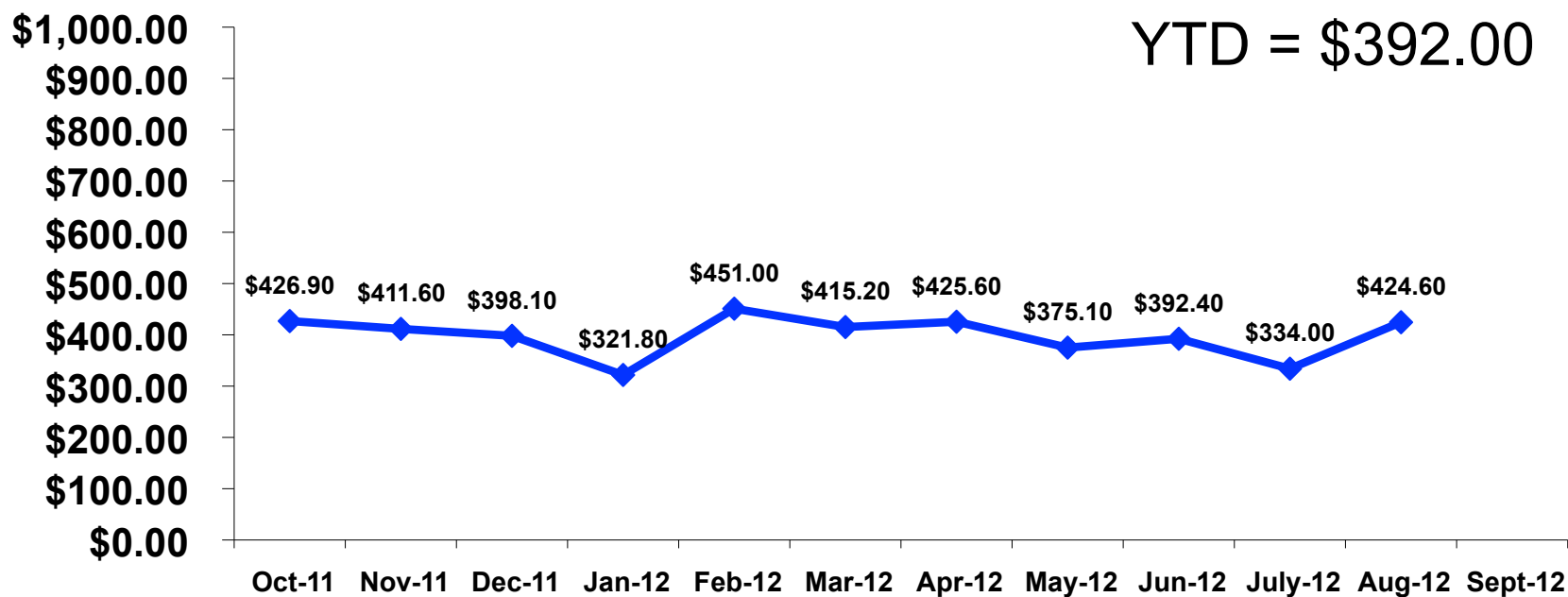
N=2



# On-Island Expenditures

- \$864.20 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$424.60 = overall mean average per person on-island expenditure

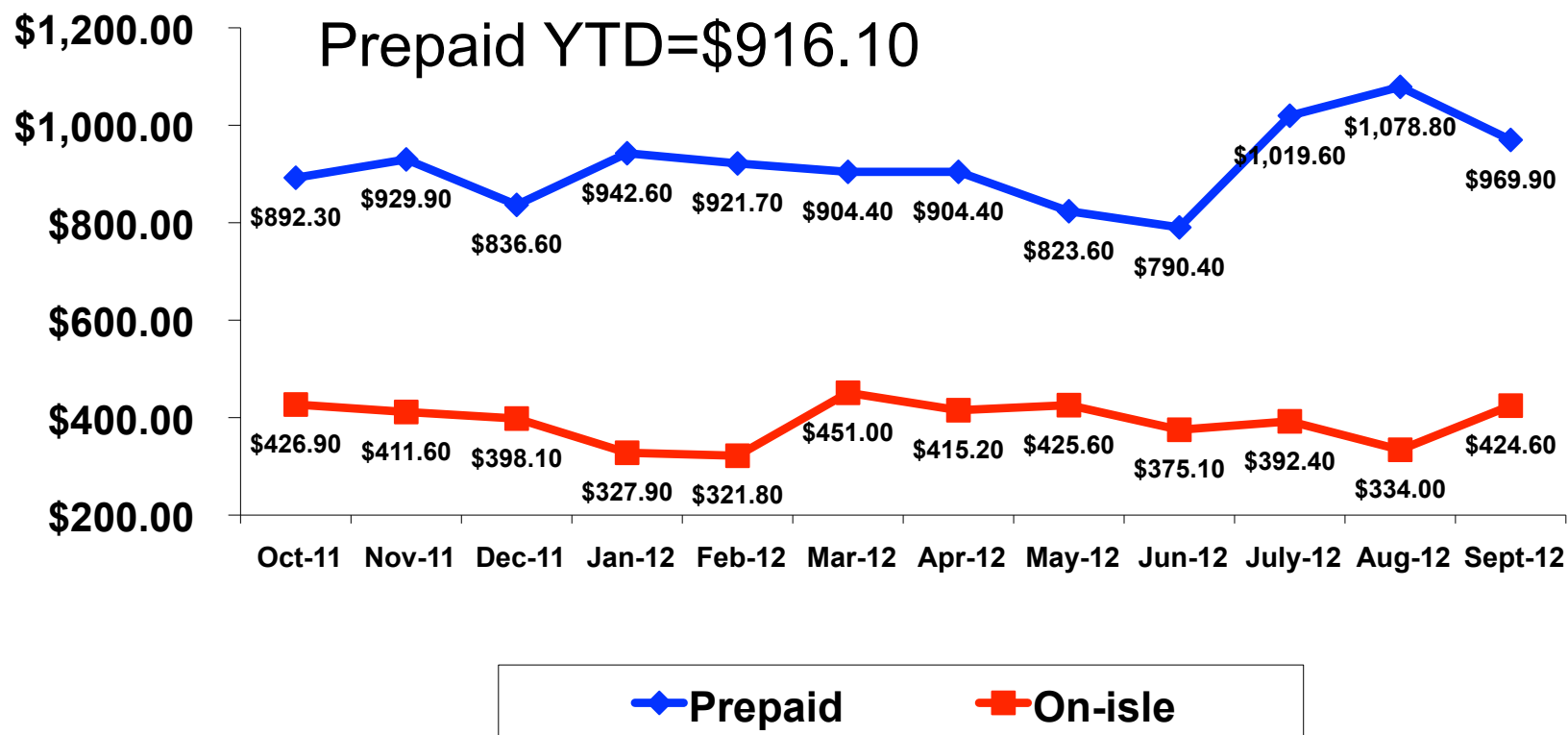
# On-Island Expenditures Per Person



# Prepaid / On-Island Expenditures Per Person

On-Island YTD = \$392.00

Prepaid YTD=\$916.10



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
			Male	Female	Male				Female				
					AGE				AGE				
					20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$864.20	\$862.43	\$866.02	\$771.19	\$830.08	\$891.29	\$1,556.25	\$2,000.00	\$1,041.52	\$820.63	\$569.20	\$25 00
	Median	\$520	\$500	\$580	\$655	\$500	\$500	\$425	\$2,000	\$705	\$500	\$492	\$0



# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$57.79	\$69.15	\$46.10	\$0.00	\$20.54	\$58.04	\$151.51	\$12.92
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$20.56	\$21.28	\$19.81	\$0.00	\$21.34	\$20.69	\$22.32	\$10.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$53.53	\$50.10	\$57.08	\$100.00	\$59.05	\$55.61	\$39.88	\$25.00
	Median	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$81.82	\$81.69	\$81.95	\$0.00	\$89.31	\$77.46	\$106.24	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$188.09	\$216.82	\$158.52	\$0.00	\$173.35	\$208.15	\$136.34	\$137.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$121.26	\$144.84	\$96.98	\$800.00	\$112.77	\$122.08	\$138.93	\$40.83
	Median	\$0	\$0	\$0	\$800	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$33.30	\$31.79	\$34.87	\$200.00	\$35.59	\$33.30	\$31.20	\$10.83
	Median	\$0	\$0	\$0	\$200	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$306.09	\$245.65	\$368.65	\$0.00	\$431.20	\$251.14	\$188.76	\$794.33
	Median	\$10	\$0	\$60	\$0	\$50	\$5	\$30	\$0
TOTAL ON ISLAND	Mean	\$864.20	\$862.43	\$866.02	\$2,000.00	\$943.22	\$825.42	\$812.73	\$1,045.83
	Median	\$520	\$500	\$580	\$2,000	\$700	\$500	\$500	\$50

# On-Island Expenditures

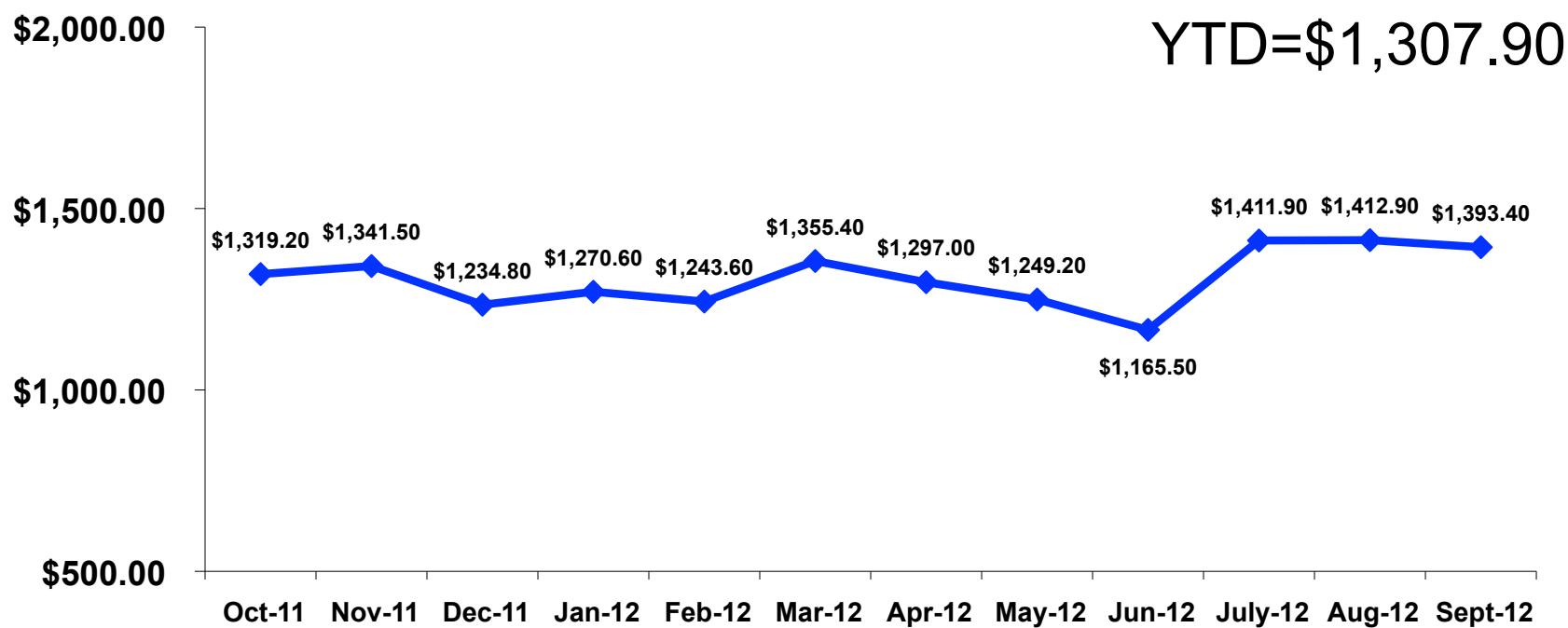
## First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$63.17	\$21.91
	Median	\$0	\$0
F&B-FF	Mean	\$18.76	\$22.05
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$53.34	\$56.02
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$85.19	\$60.45
TOUR	Median	\$0	\$0
GIFT/	Mean	\$190.47	\$171.34
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$123.84	\$106.16
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$32.66	\$31.64
	Median	\$0	\$0
OTHER EXP	Mean	\$304.50	\$323.98
	Median	\$10	\$0
TOTAL ON	Mean	\$874.04	\$792.93
ISLAND	Median	\$522	\$500

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

- \$1,393.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,701 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person



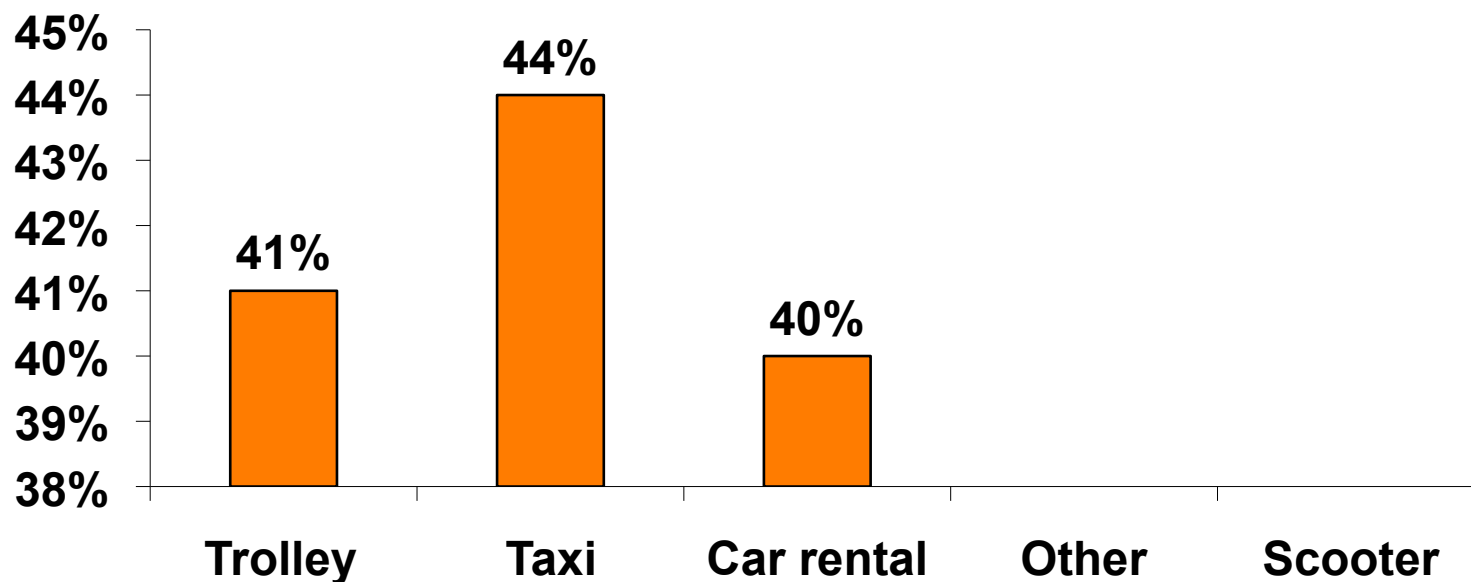
---

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$57.80
Food & beverage in fast food restaurant/ convenience store	\$20.60
Food & beverage at restaurants or drinking establishments outside a hotel	\$53.50
Optional tours and activities	\$81.80
Gifts/ souvenirs for yourself/companions	\$188.10
Gifts/ souvenirs for friends/family at home	\$121.30
Local transportation	\$33.30
Other expenses not covered	\$306.10
<b>Average Total</b>	<b>\$864.20</b>

# Local Transportation

n=138



Mean=\$33.30 per travel party

# Guam Airport Expenditures

- \$60.90 = 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	\$13.40
Gifts/Souvenirs Self	\$27.60
Gifts/Souvenirs Others	\$20.00
Total	\$60.90

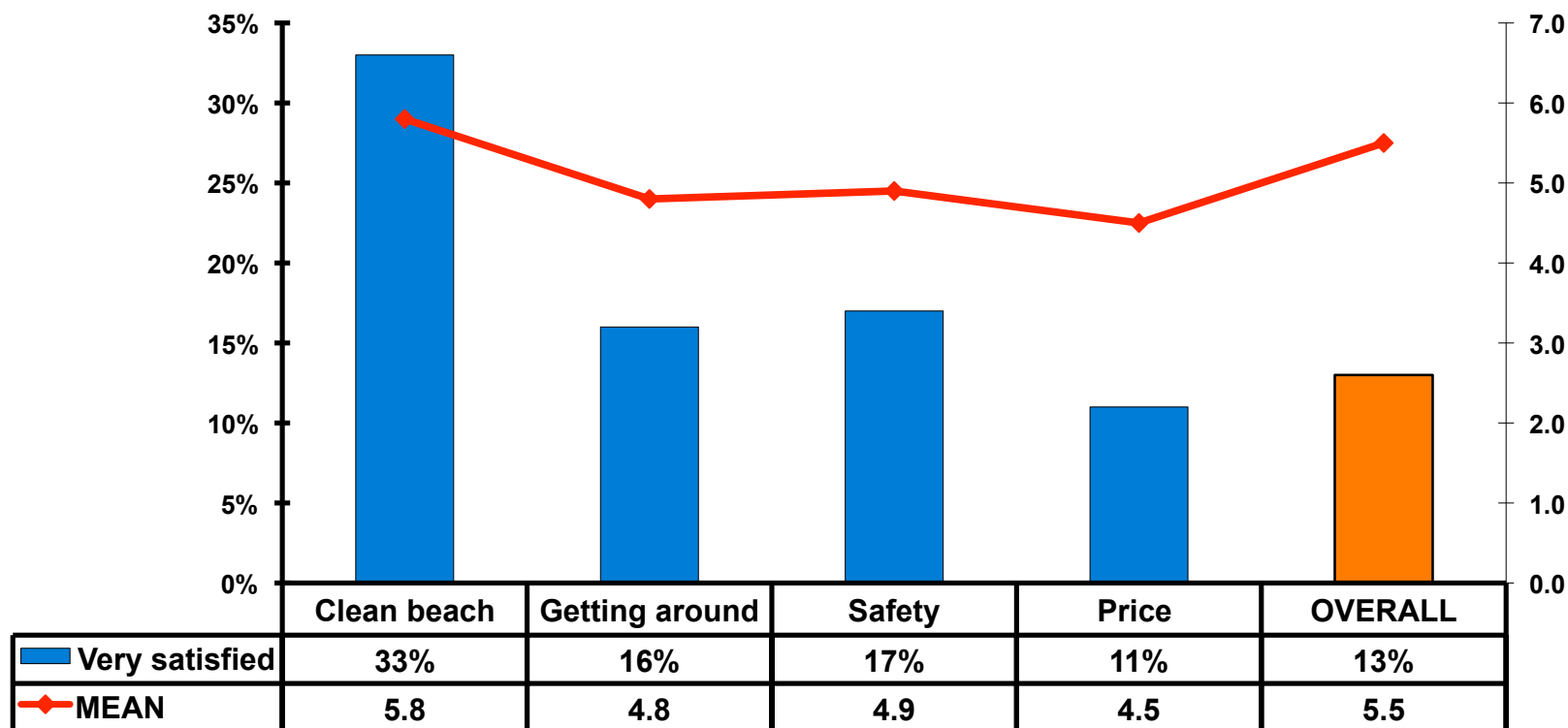


# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

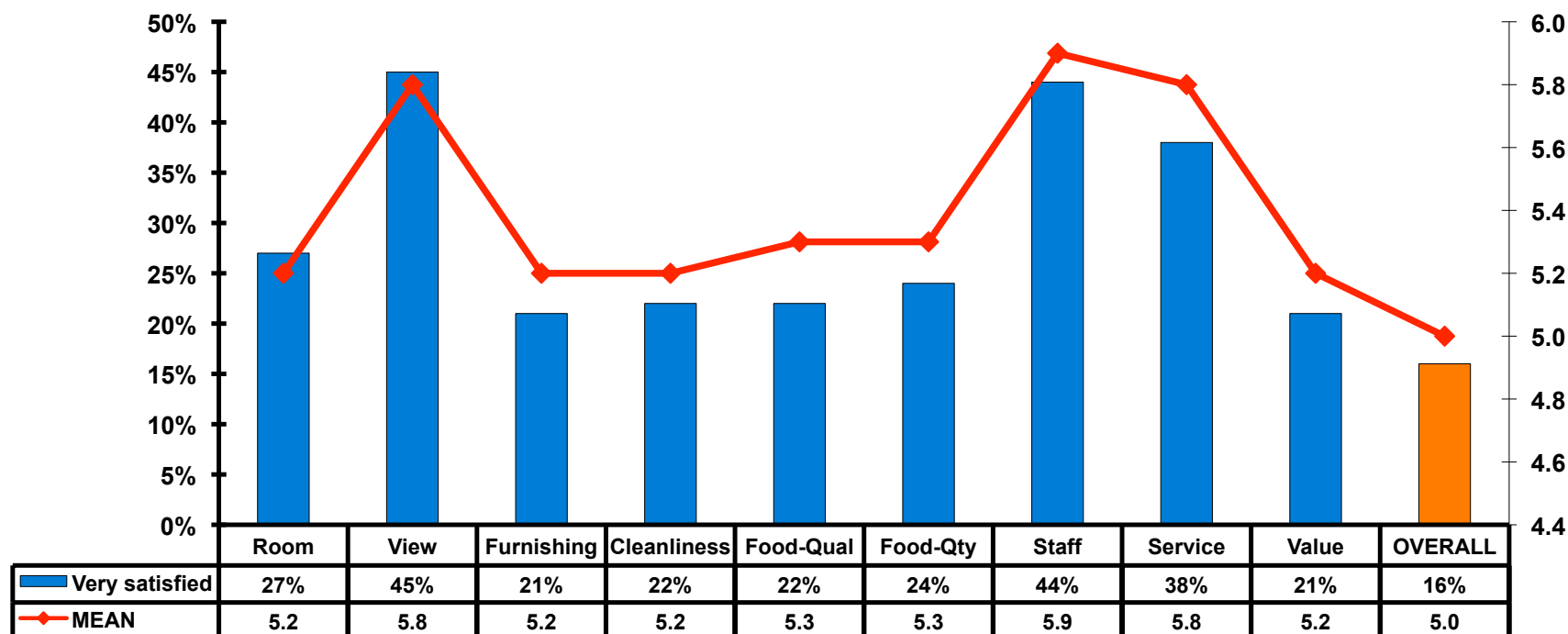
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

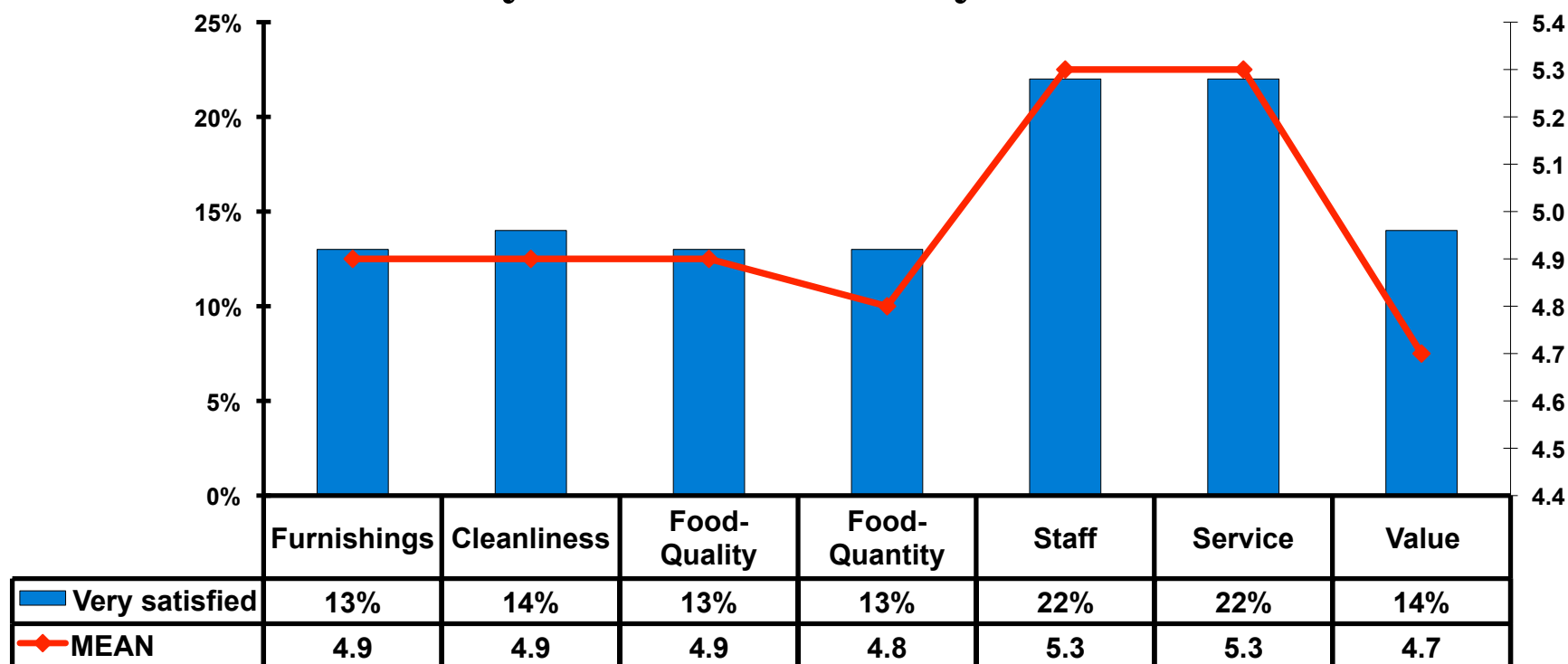
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

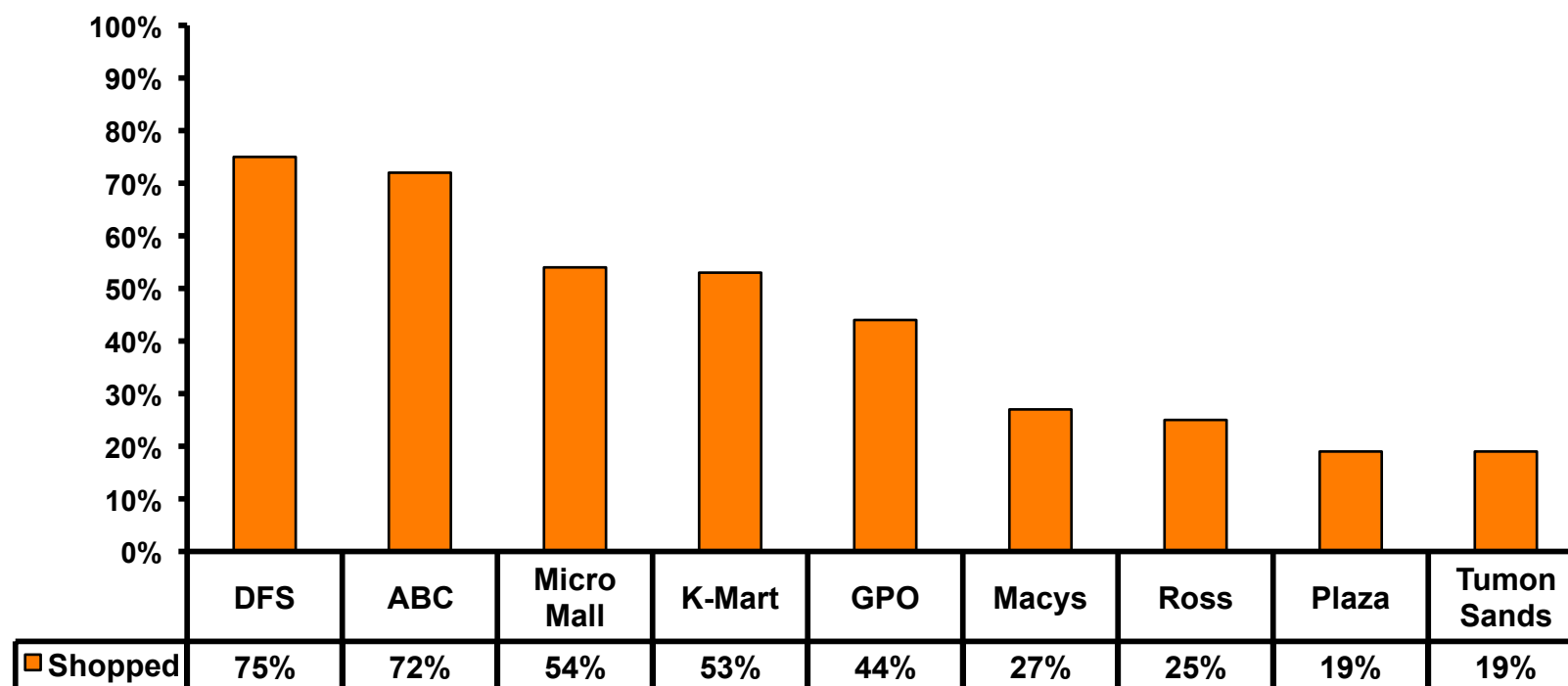
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

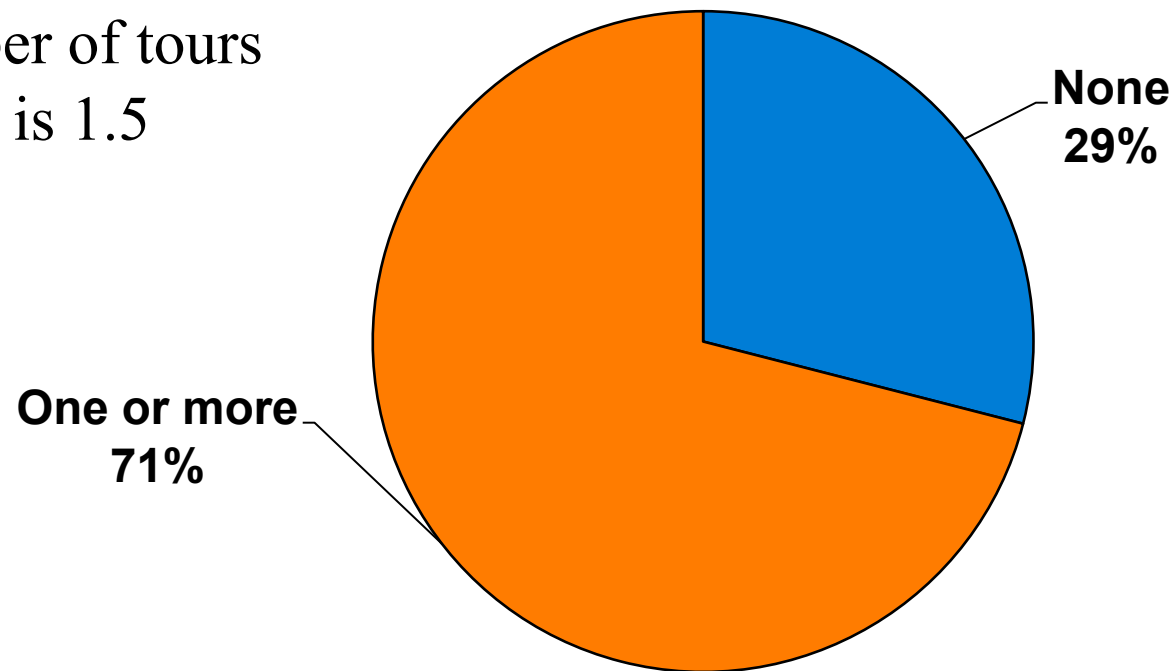
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>47%</b>	Score of 6 to 7 = <b>43%</b>
Score of 4 to 5 = <b>45%</b>	Score of 4 to 5 = <b>45%</b>
Score 1 to 3 = <b>8%</b>	Score 1 to 3 = <b>12%</b>
<b>MEAN = 5.2</b>	<b>MEAN = 5.0</b>

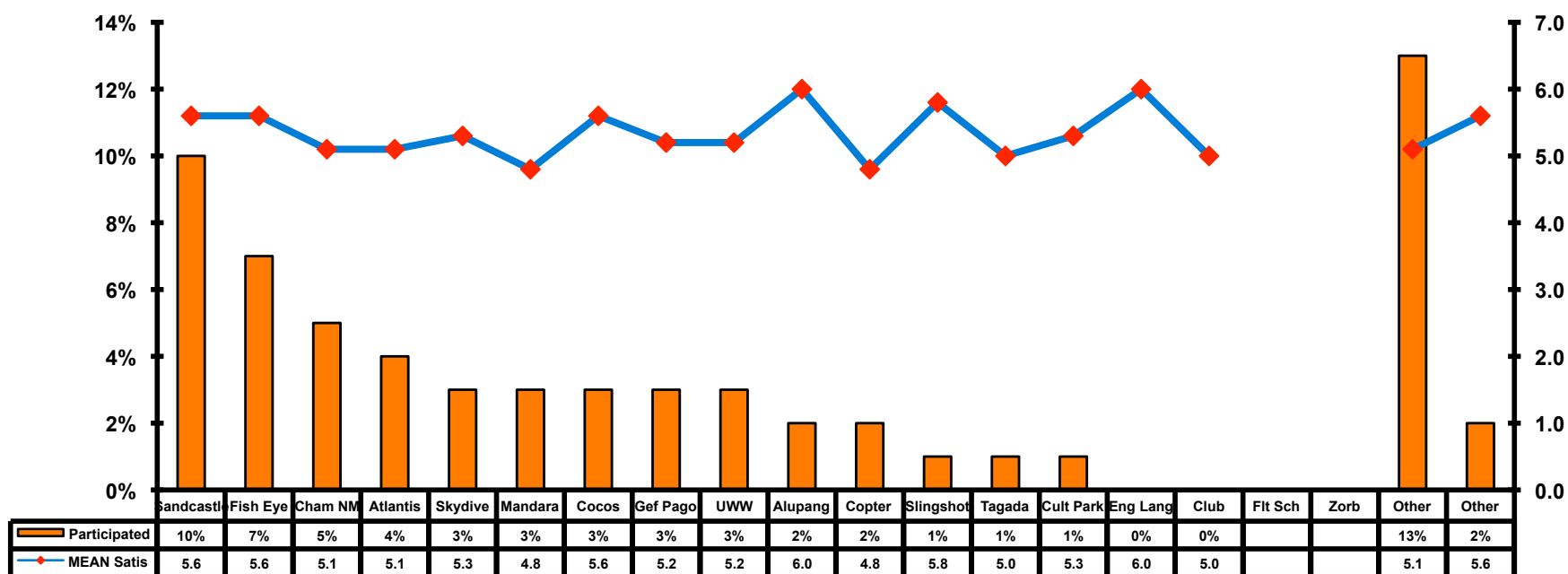
# Optional Tour Participation

- Average number of tours participated in is 1.5



# 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>41%</b>	Score of 6 to 7 = <b>33%</b>
Score of 4 to 5 = <b>50%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>9%</b>	Score 1 to 3 = <b>13%</b>
<b>MEAN = 5.0</b>	<b>MEAN = 4.8</b>

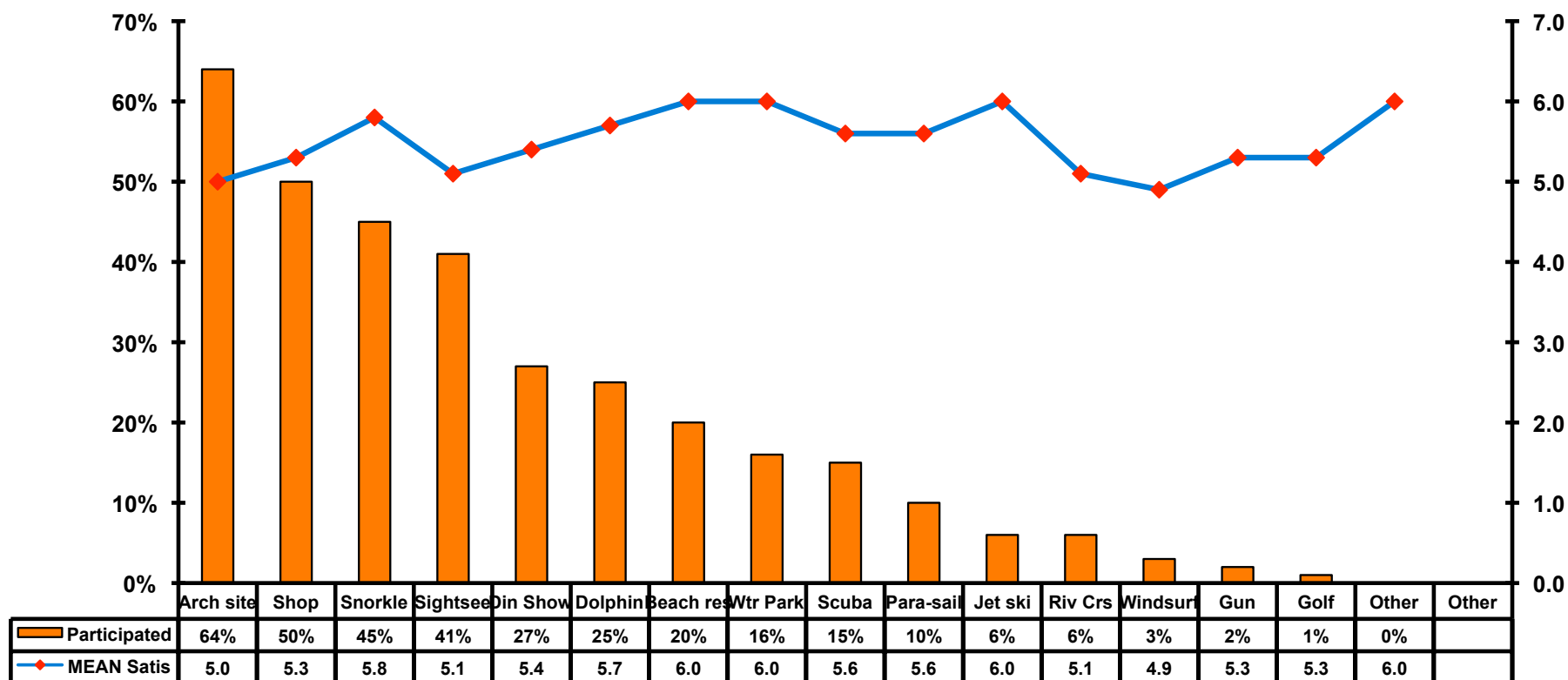
# Night Tours Satisfaction

**7pt Rating Scale**

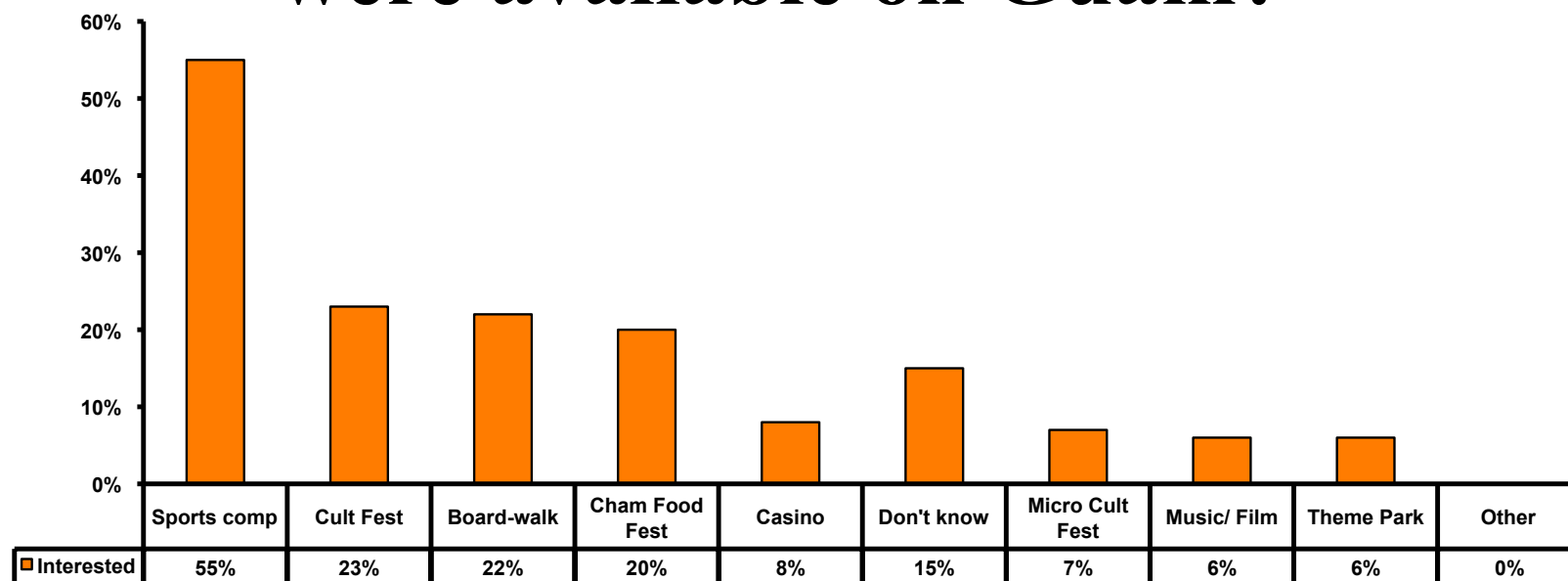
**7=Very Satisfied/ 1=Very Dissatisfied**

<b>Quality of Night Tour</b>	<b>Variety of Night Tour</b>
Score of 6 to 7 = <b>26%</b>	Score of 6 to 7 = <b>24%</b>
Score of 4 to 5 = <b>56%</b>	Score of 4 to 5 = <b>55%</b>
Score 1 to 3 = <b>18%</b>	Score 1 to 3 = <b>20%</b>
<b>MEAN = 4.5</b>	<b>MEAN = 4.5</b>

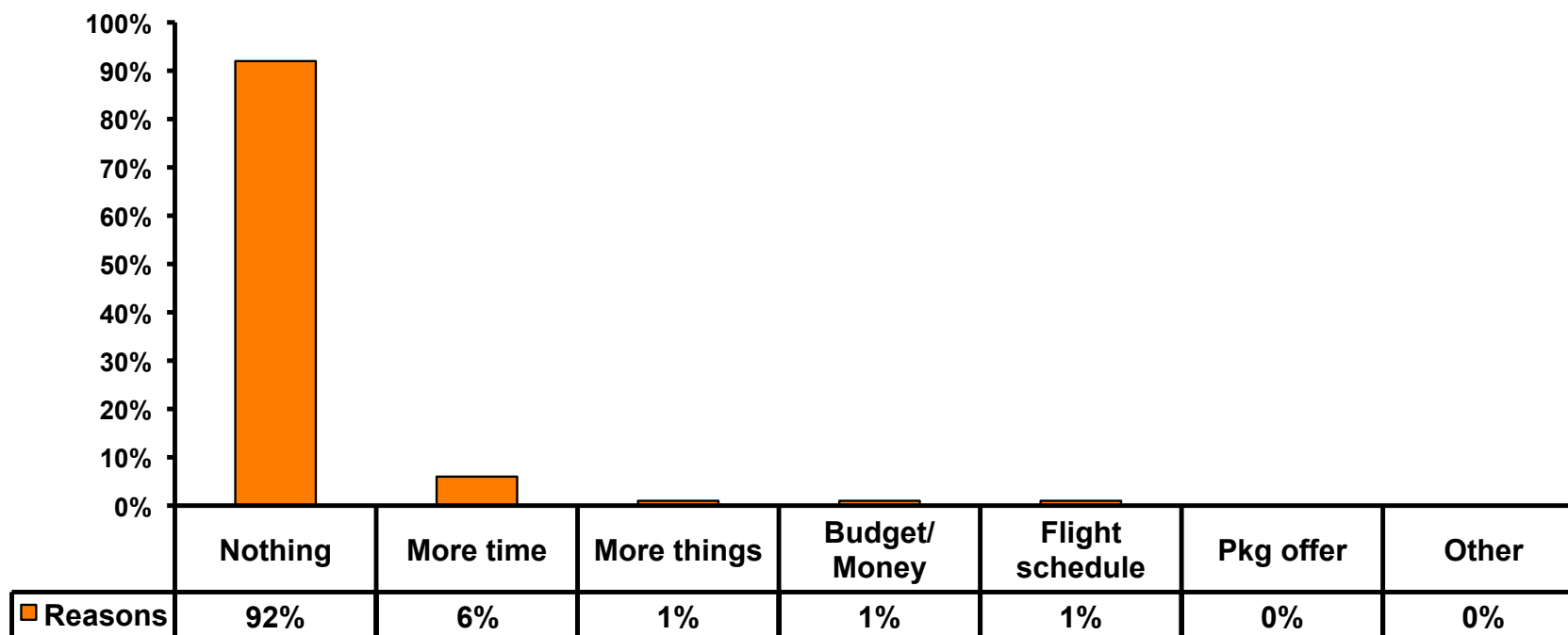
# Satisfaction with Other Activities



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



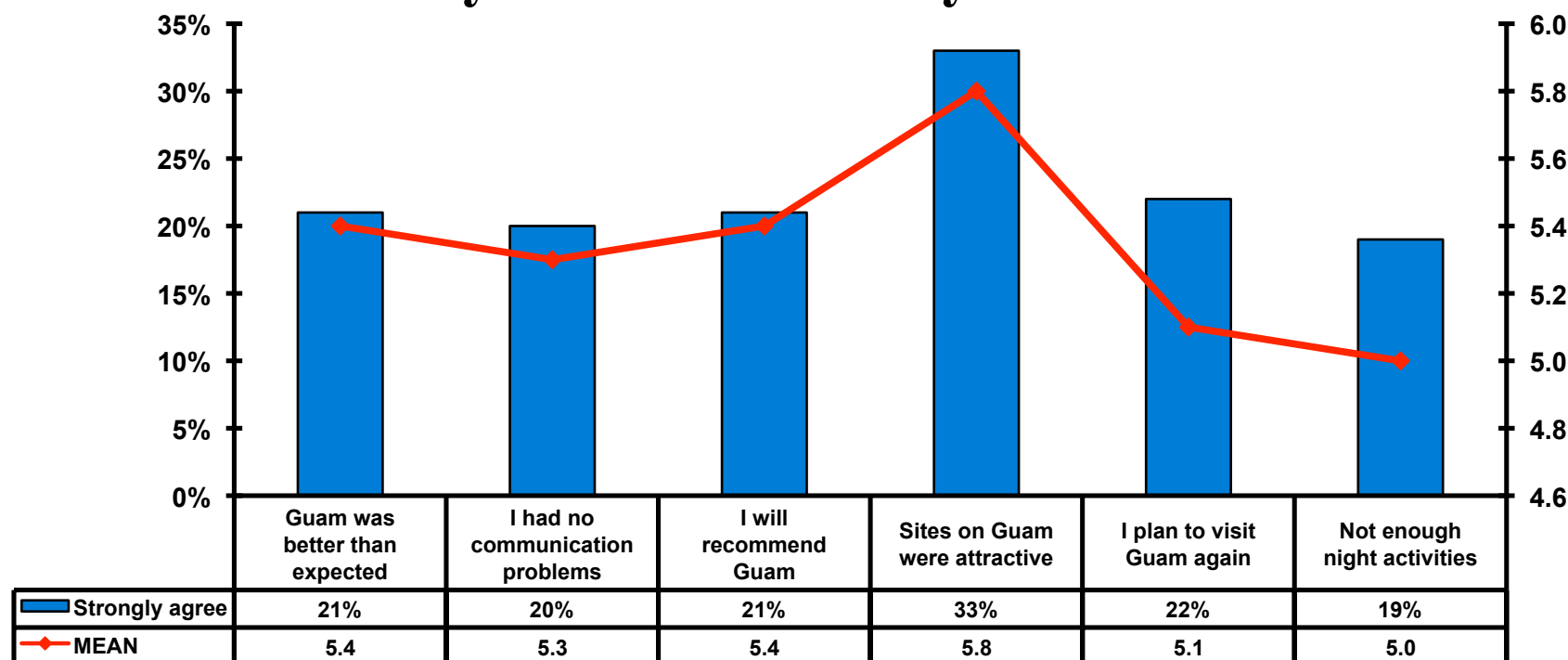
# What would it take to make you want to stay an extra day on Guam?



# On-Island Perceptions

7pt Rating Scale

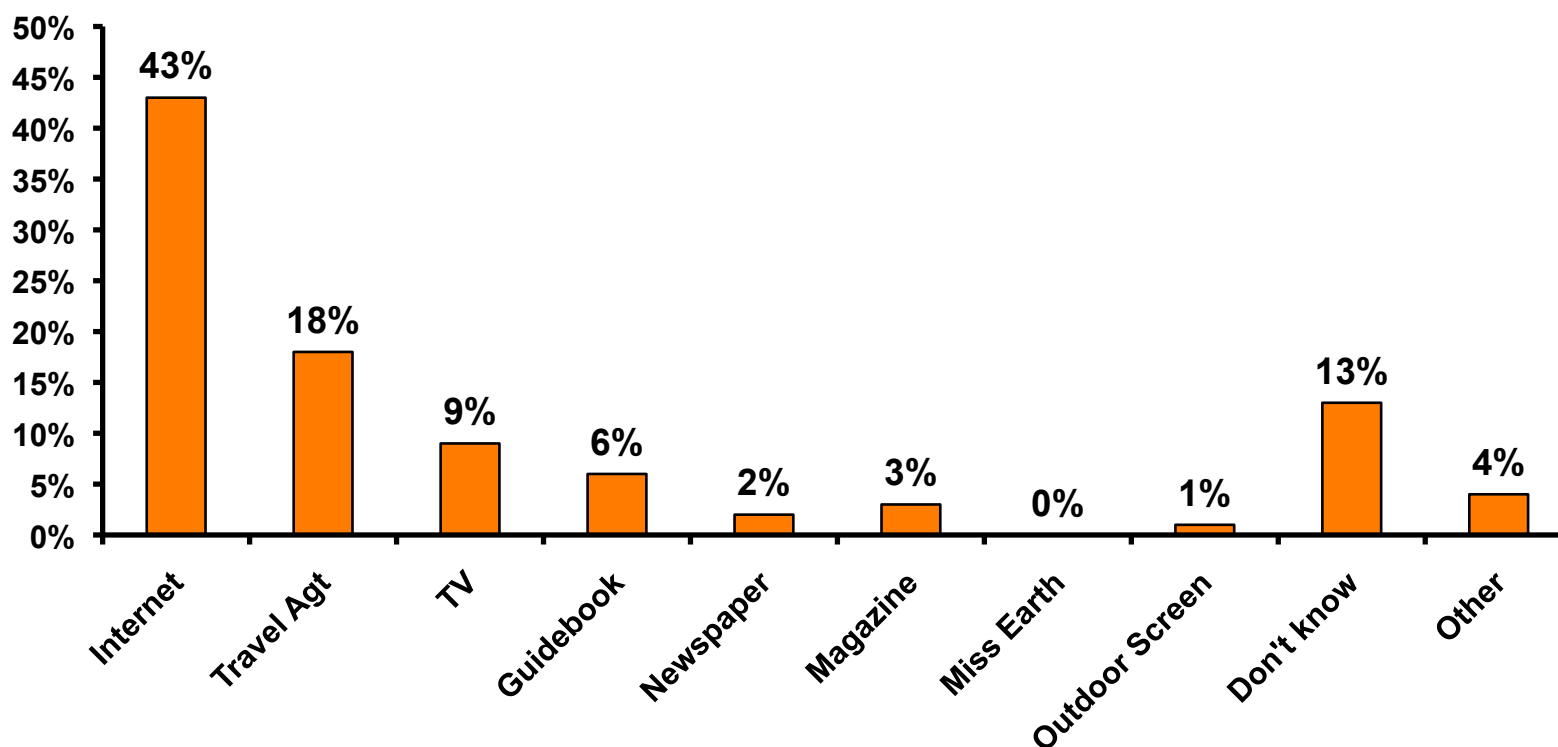
7=Very Satisfied/ 1=Very Dissatisfied



# SECTION 5 **PROMOTIONS**

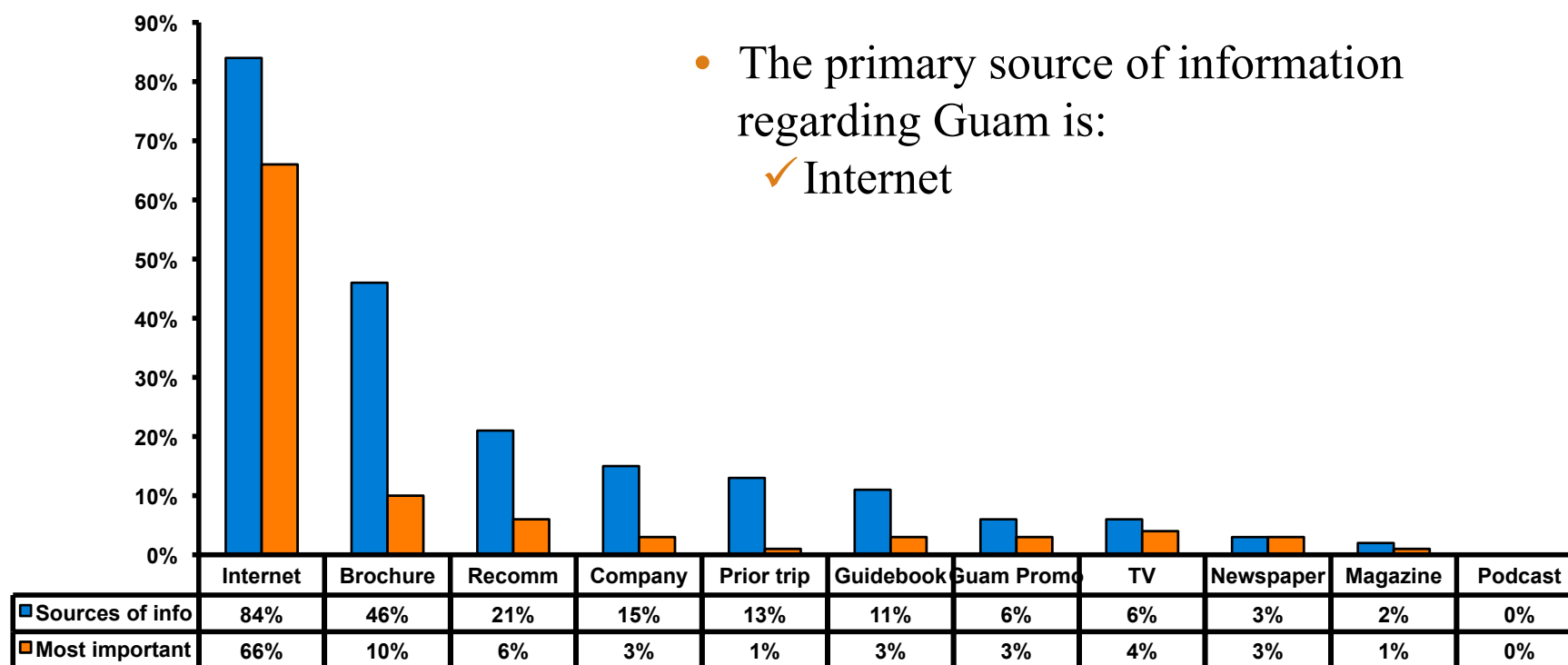
# Guam Promotion - Media

## Past 90 days



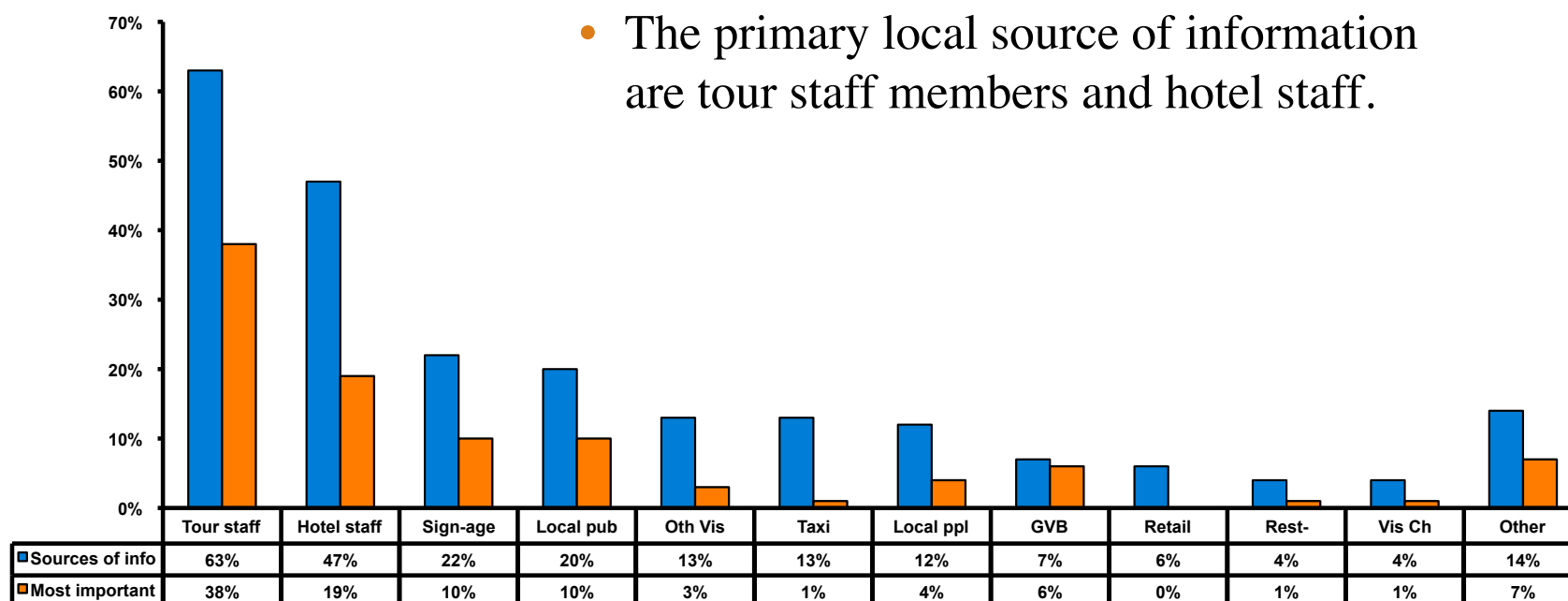


# Sources of Information Pre-arrival



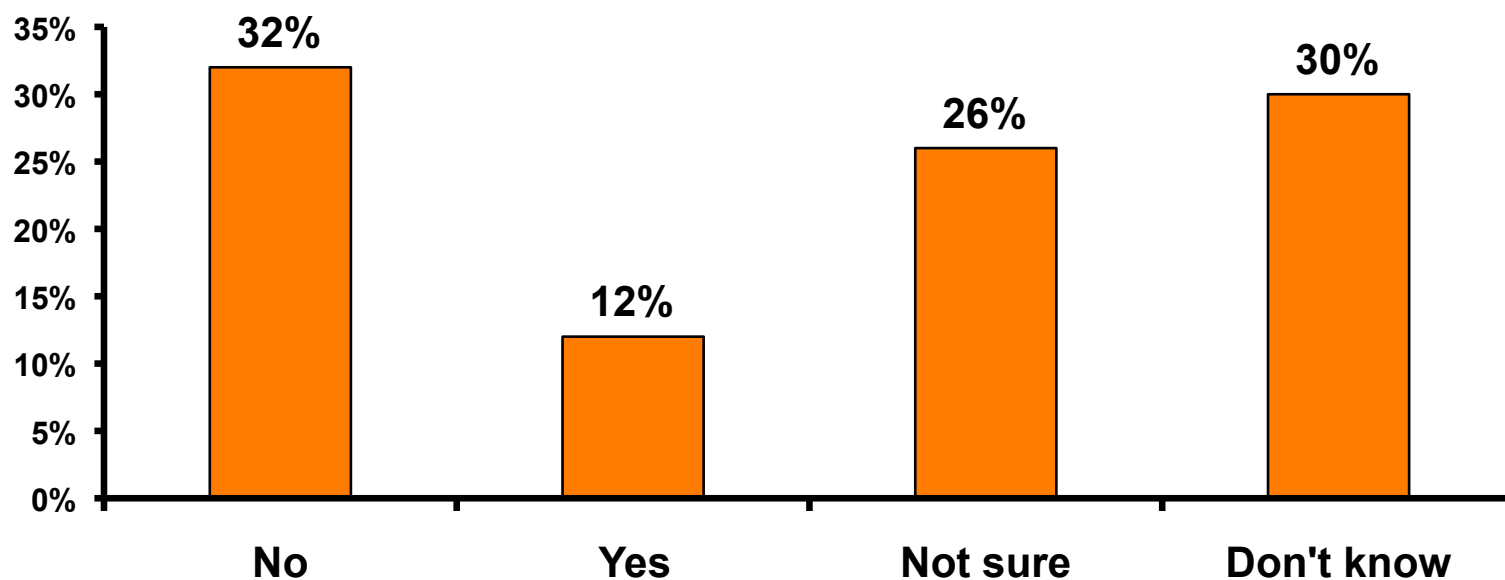
# Sources of Information Post-arrival

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



# SECTION 6 **OTHER ISSUES**

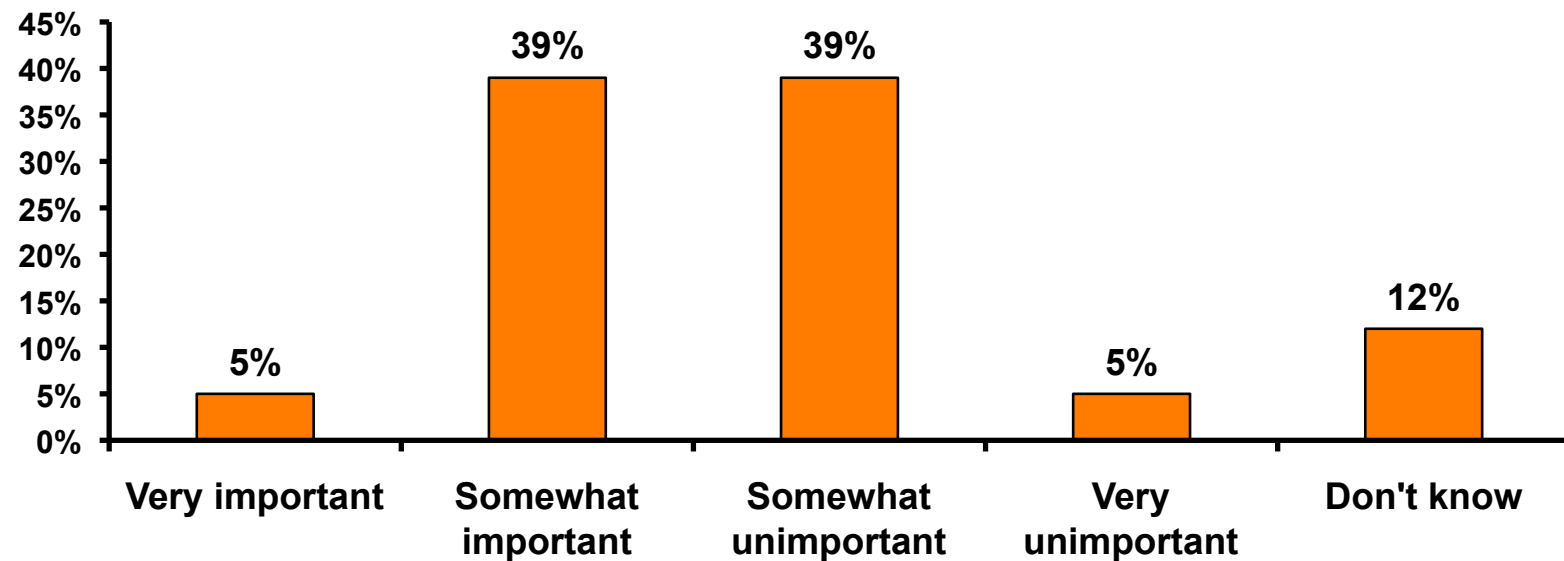
## Good time to spend money on travel outside of Korea - Overall



# 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		26%	33%	41%	17%	25%	37%	30%	32%	13%
	Yes		14%	12%	10%	8%	6%	12%	9%	15%	13%
	Not sure		28%	24%	29%	50%	25%	28%	24%	29%	25%
	Do not know	100%	32%	32%	20%	25%	44%	23%	37%	24%	50%
Total	Count	1	88	207	41	12	32	106	100	85	8

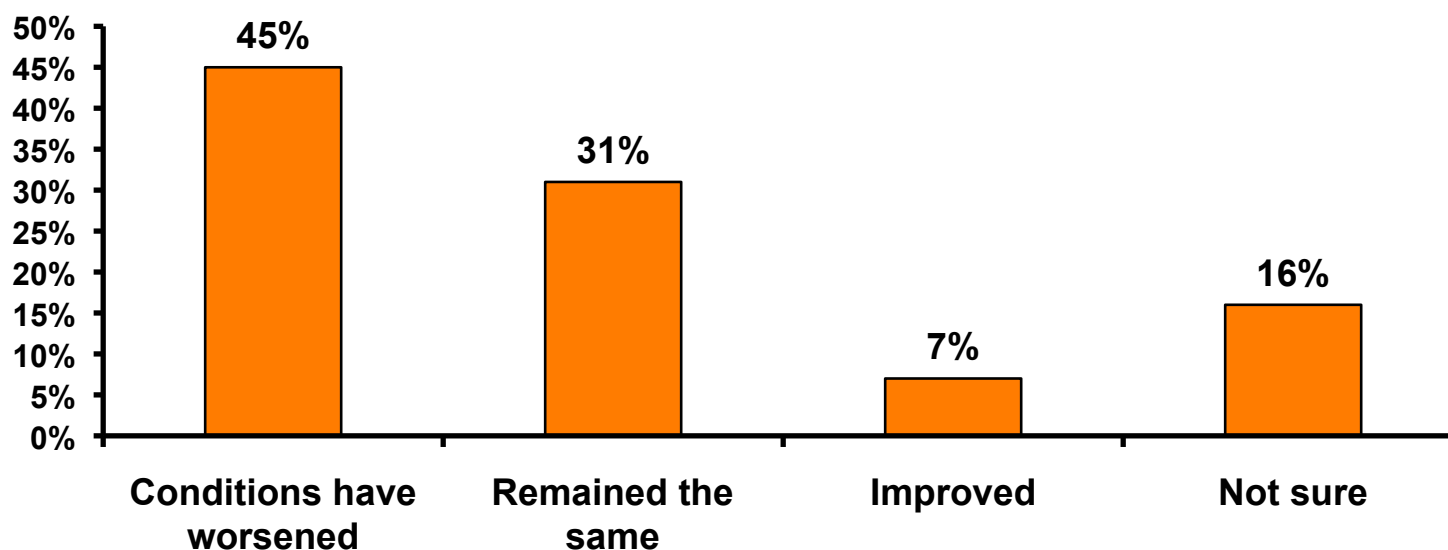
# The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



# 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		6%	4%	5%	8%	9%	1%	7%	5%	
	Somewhat unimportant		41%	37%	44%	50%	25%	36%	37%	52%	38%
	Somewhat important		38%	41%	44%	17%	38%	46%	40%	31%	25%
	Very important		3%	6%		8%	9%	6%	6%	2%	
	Don't know	100%	13%	13%	7%	17%	19%	11%	10%	11%	38%
Total	Count	1	88	207	41	12	32	106	100	85	8

# Rating Korean Economy Compared to 12 months ago

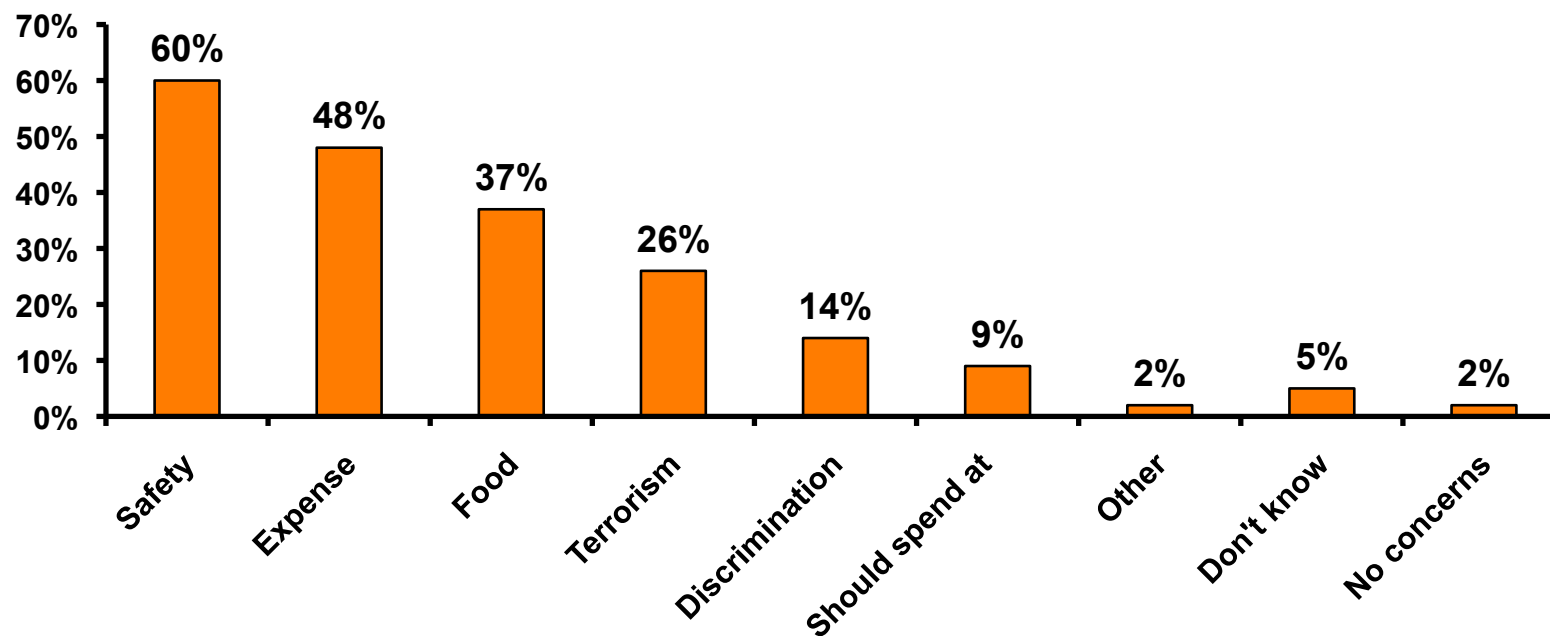




# Rating Korean Economy Compared to 12 months ago by Age & Income

		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		42%	45%	46%	58%	41%	42%	57%	39%	38%
	Conditions have remained the same	100%	25%	32%	39%	33%	31%	30%	23%	44%	13%
	Conditions have improved		9%	7%	7%			12%	6%	7%	13%
	Do not know		24%	15%	7%	8%	28%	16%	14%	11%	38%
Total	Count	1	88	207	41	12	32	106	100	85	8

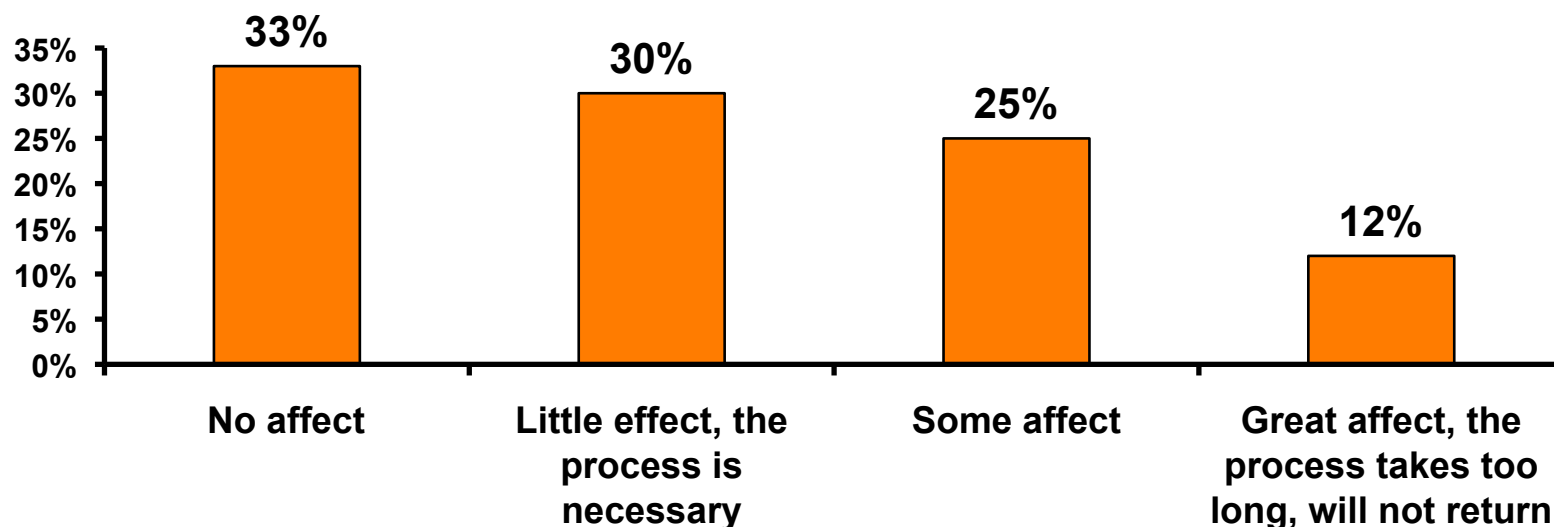
# Concerns about travel outside of Korea - Overall



# 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		56%	62%	63%	67%	59%	55%	68%	63%	25%
	Expense		54%	46%	59%	25%	56%	44%	53%	46%	38%
	Food		40%	35%	44%	25%	47%	34%	36%	40%	38%
	Terrorism		32%	24%	27%	17%	38%	23%	20%	34%	25%
	Spending money abroad when it should be spent at home		15%	7%	7%		13%	16%	5%	6%	
	Do not know		1%	6%	7%	17%		4%	9%	4%	25%
	Other		2%	3%				3%	3%	1%	13%
	No concerns	100%	1%	3%			3%	5%		2%	
Total	Cases	1	87	203	41	12	32	105	99	82	8

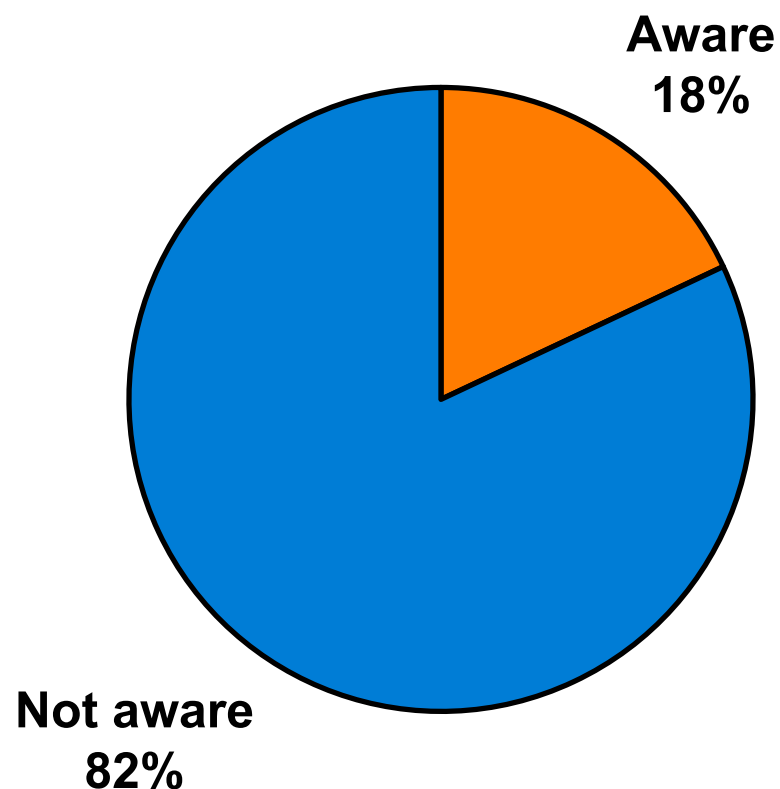
# Security Screening/ Immigration Process at Guam International Airport



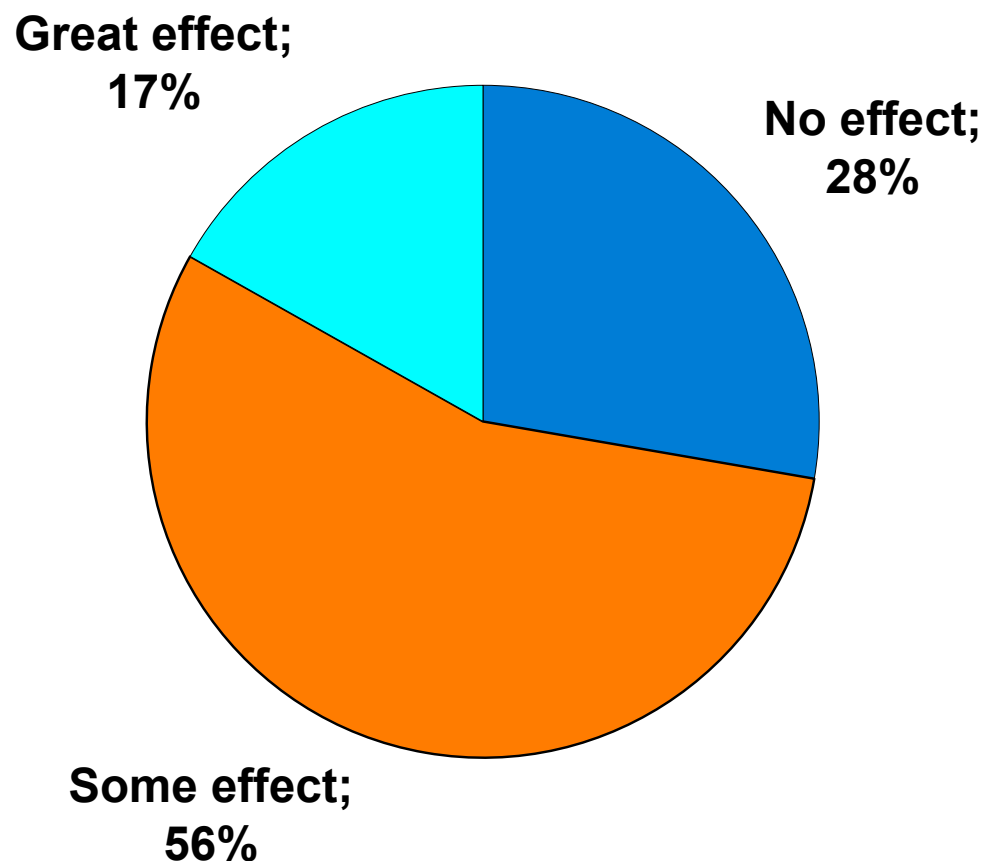
## **Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum**

- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **11%**
- Neutral (Score 4-5) – **37%**
- Disagree (Score 1-3) – **53%**

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



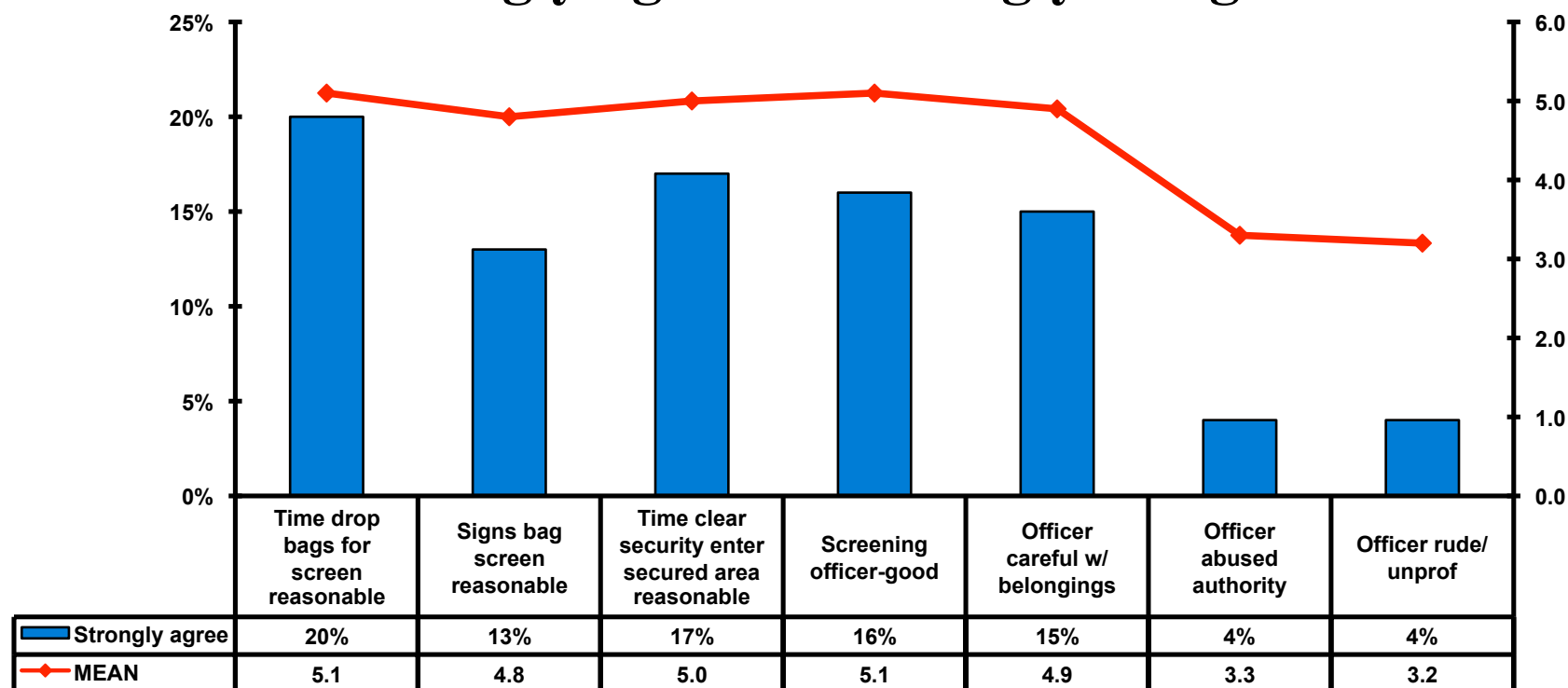
# Effects of U.S. military troop movement on future trips to Guam



# Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree





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

