



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

AUGUST 2011



Prepared by: QMark Research

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Background & Methodology

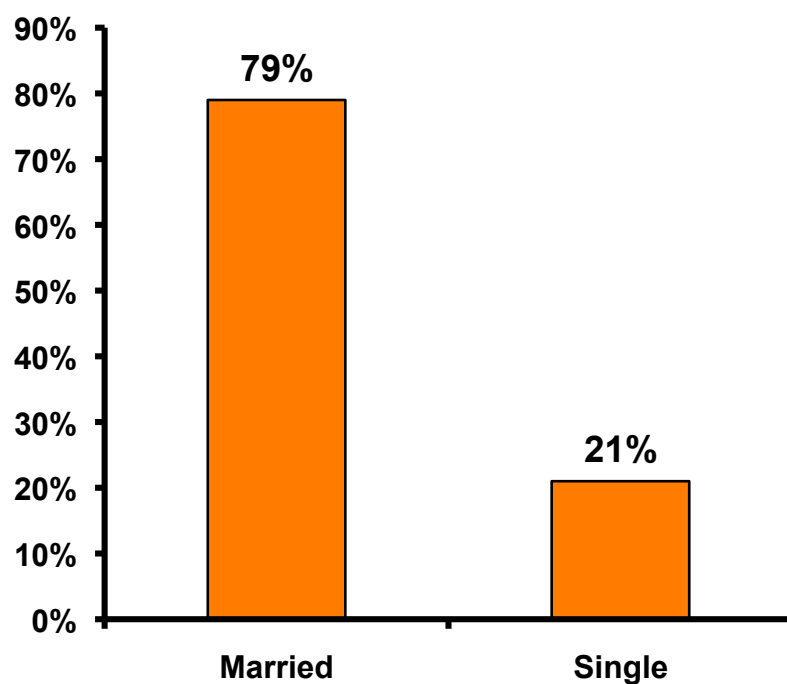
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **354** departing Korean 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.

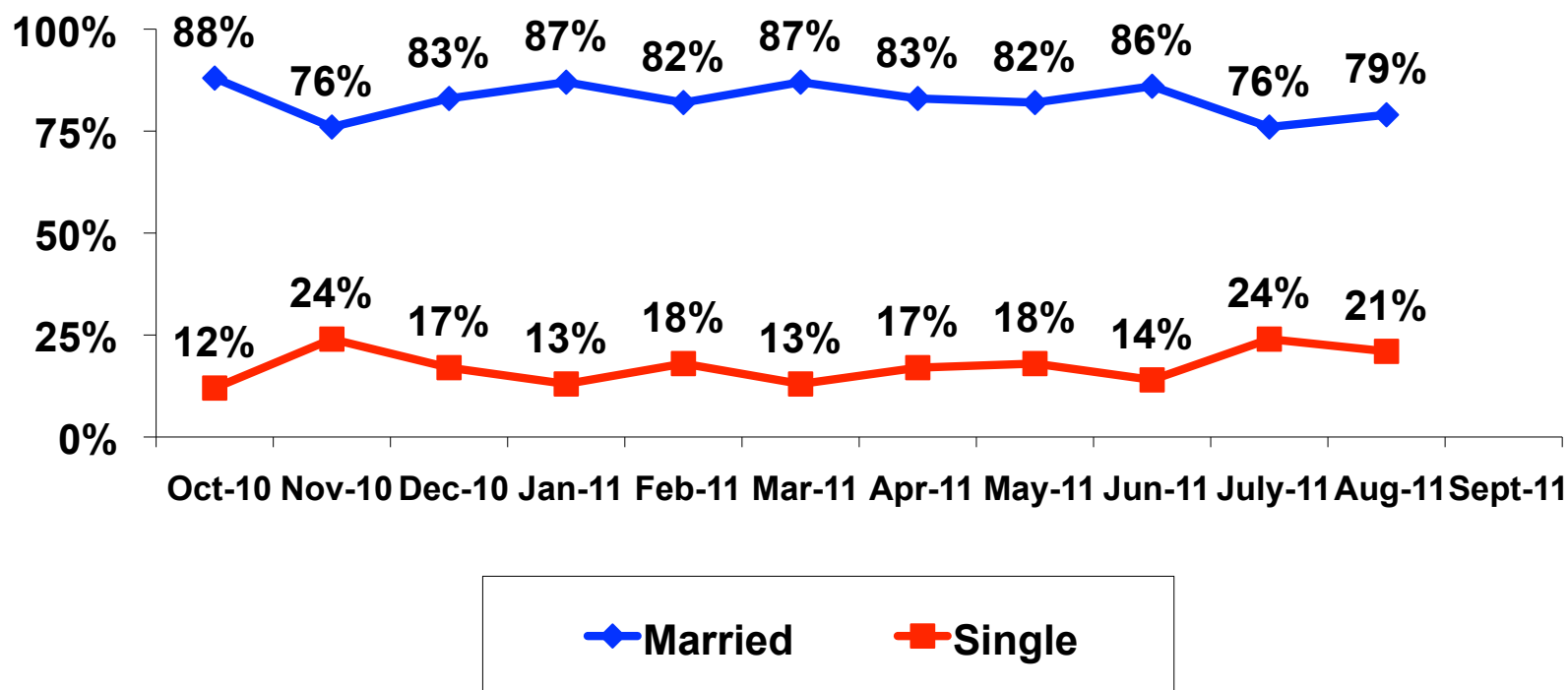
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

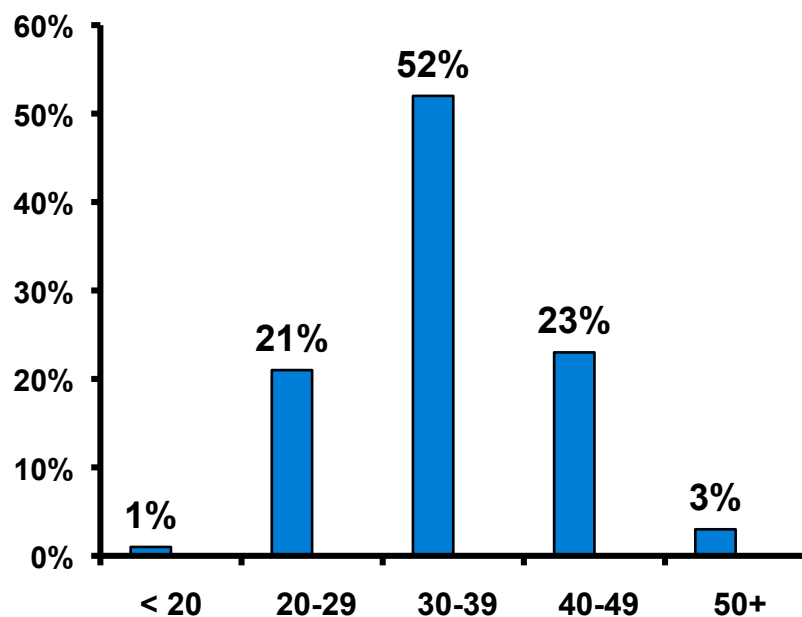


- A majority of visitors are married.

Marital Status

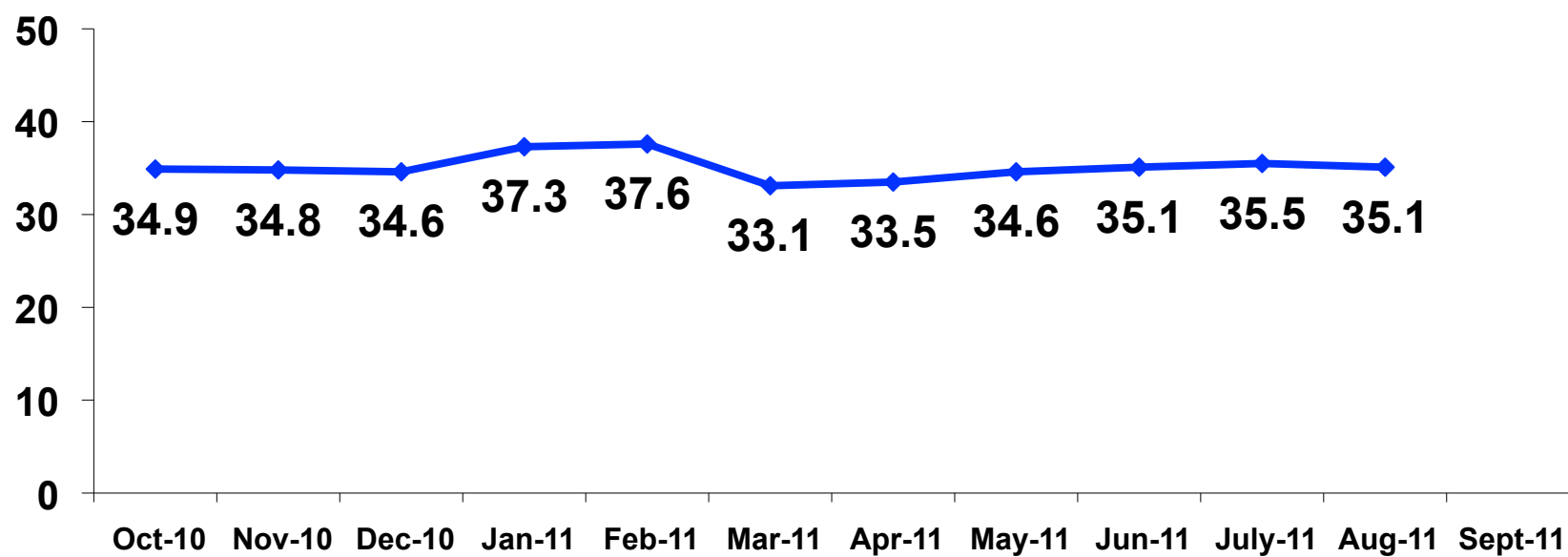


Age - Overall

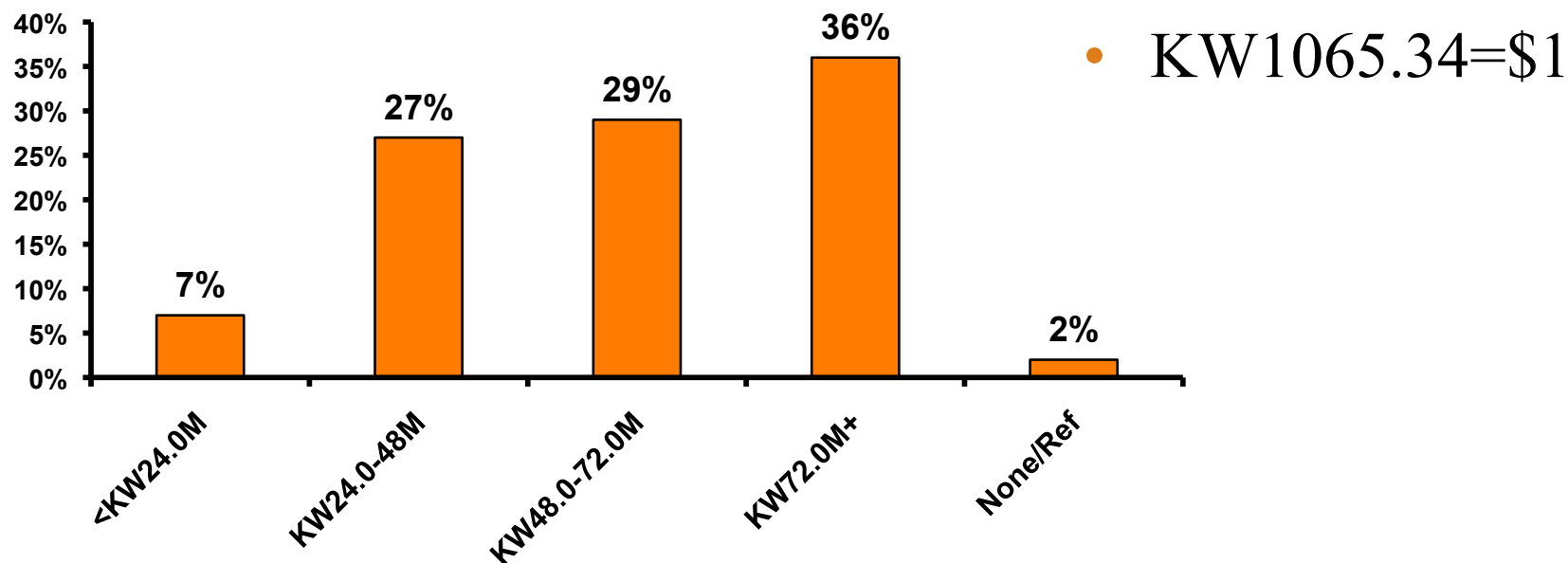


- The average age of the respondents is 35.1 years of age.

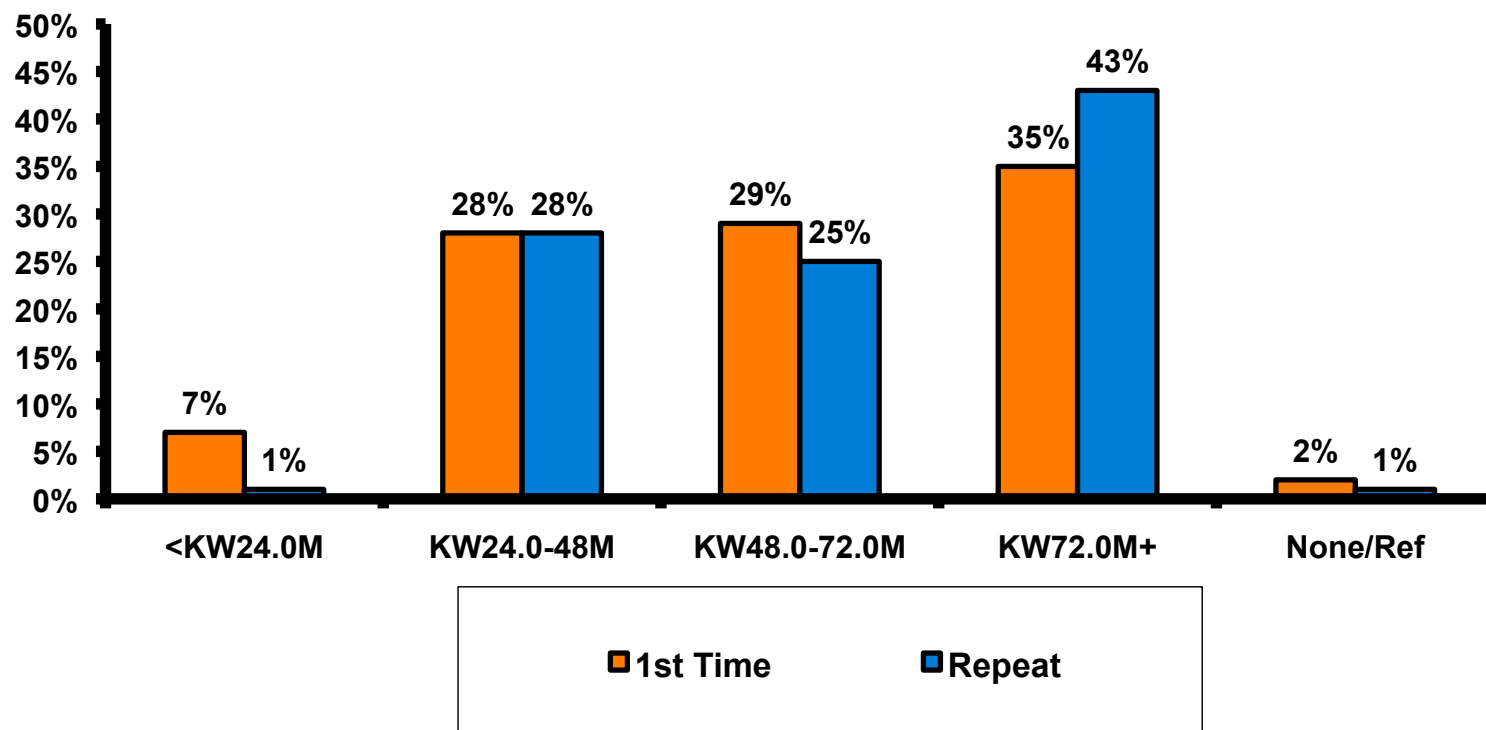
Average Age



Personal Income



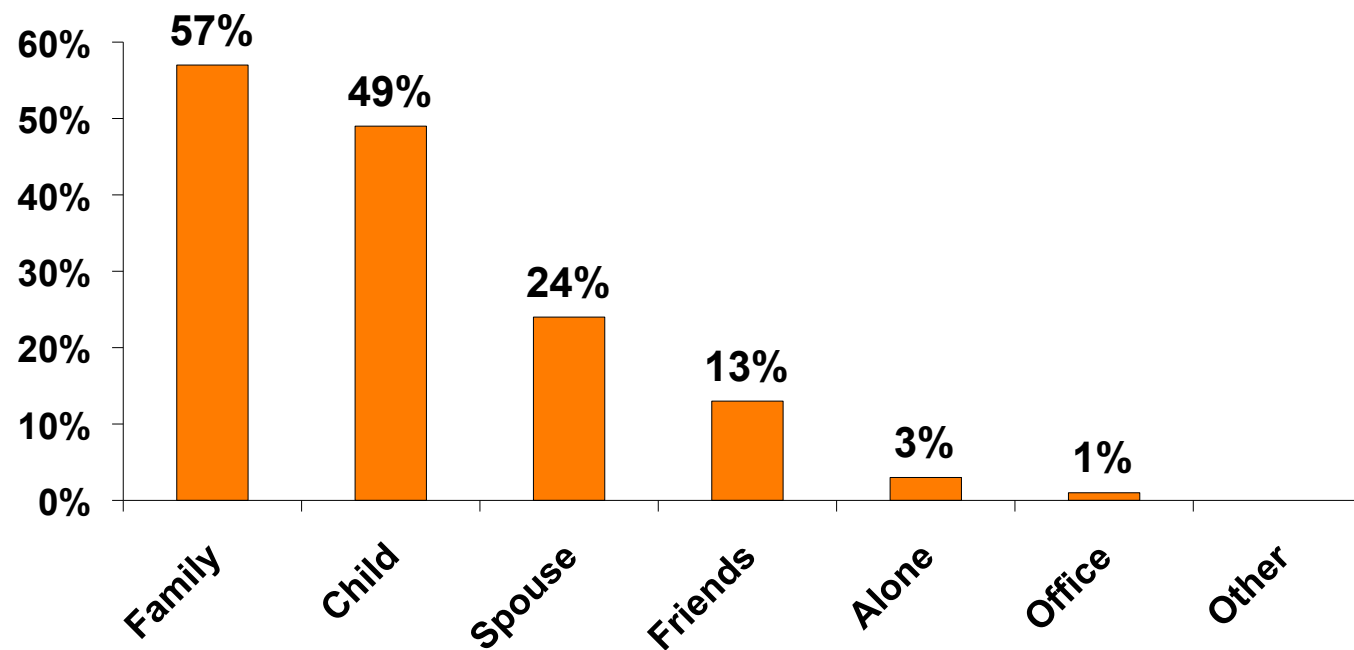
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	21	3	18	11	10		
			6%	2%	11%	16%	6%		
	KW24.0M-KW48.0M	Count	91	38	53	28	52	9	2
			28%	23%	33%	41%	29%	12%	25%
	KW48.0M-KW72.0M	Count	93	56	37	16	56	20	1
			28%	33%	23%	24%	31%	26%	13%
	KW72.0M+	Count	119	69	50	11	56	47	5
			36%	41%	31%	16%	31%	62%	63%
	Refused	Count	6	2	4	2	4		
			2%	1%	2%	3%	2%		
Total	Count	330	168	162	68	178	76	8	

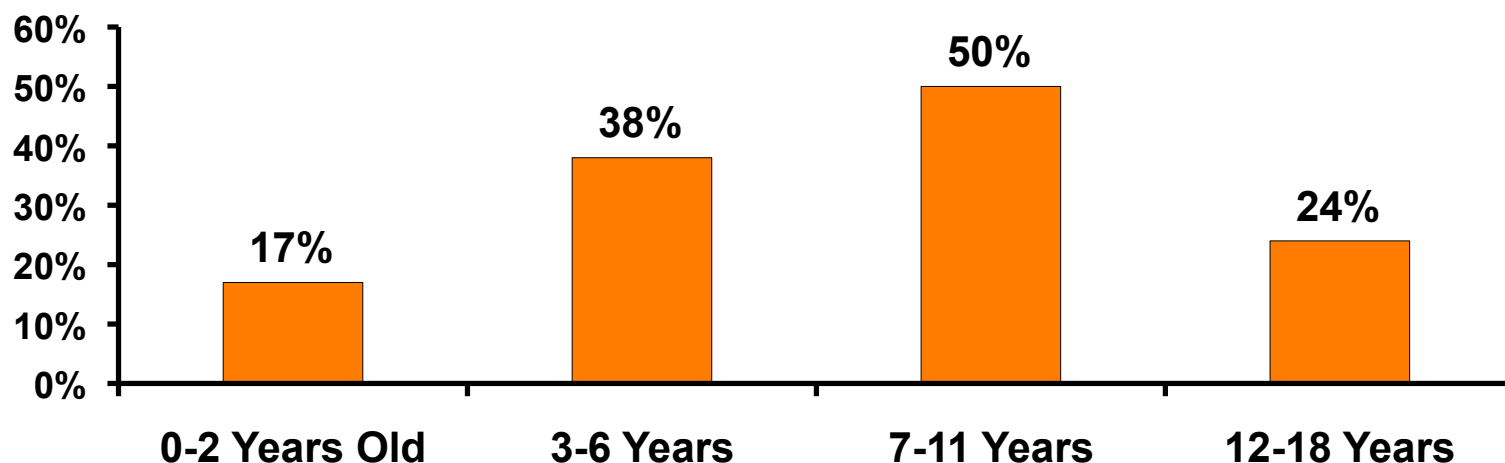
Travel Companions



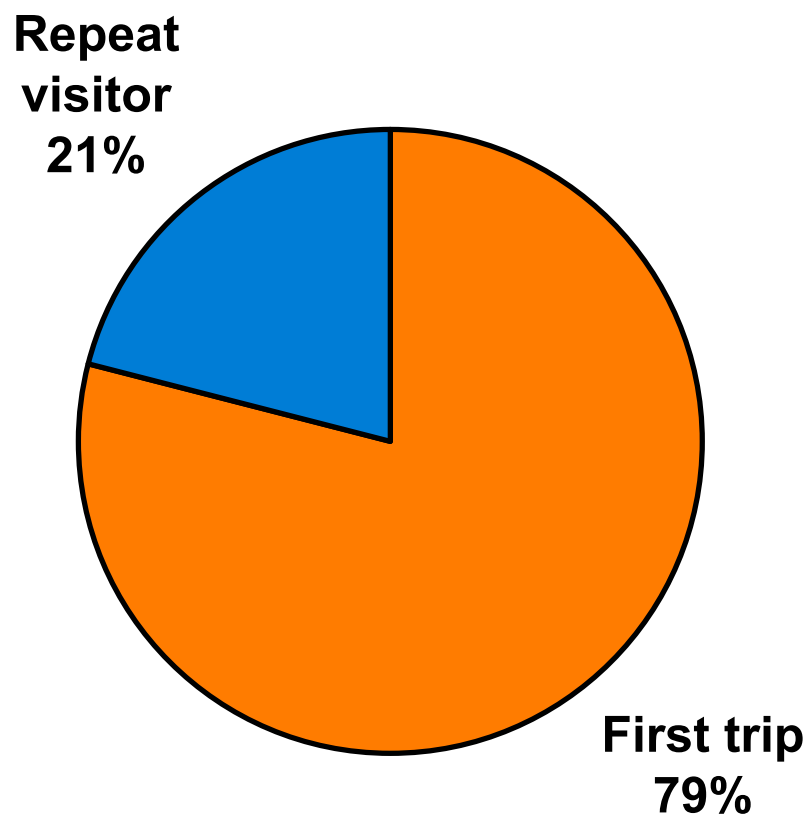
Number of Children Travel Party

N=173 total respondents traveling with children.

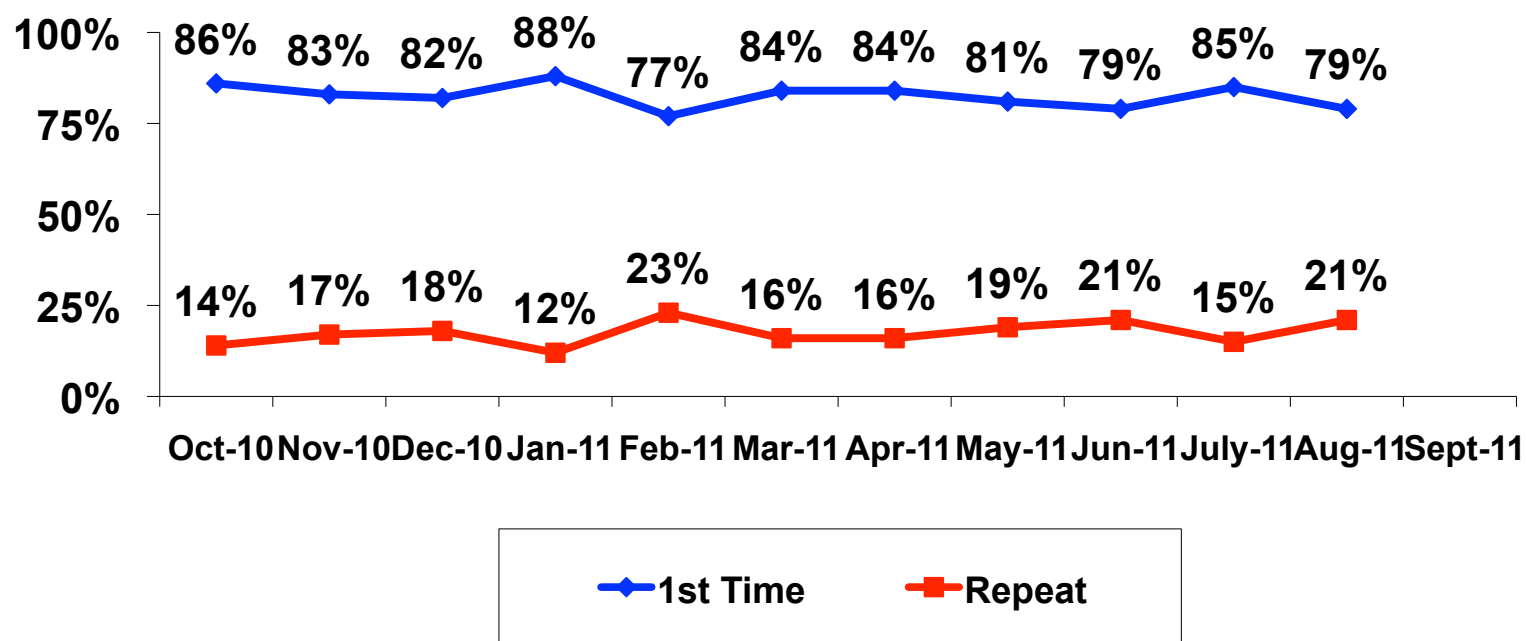
(Of those N=173 respondents, there is a total of 267 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



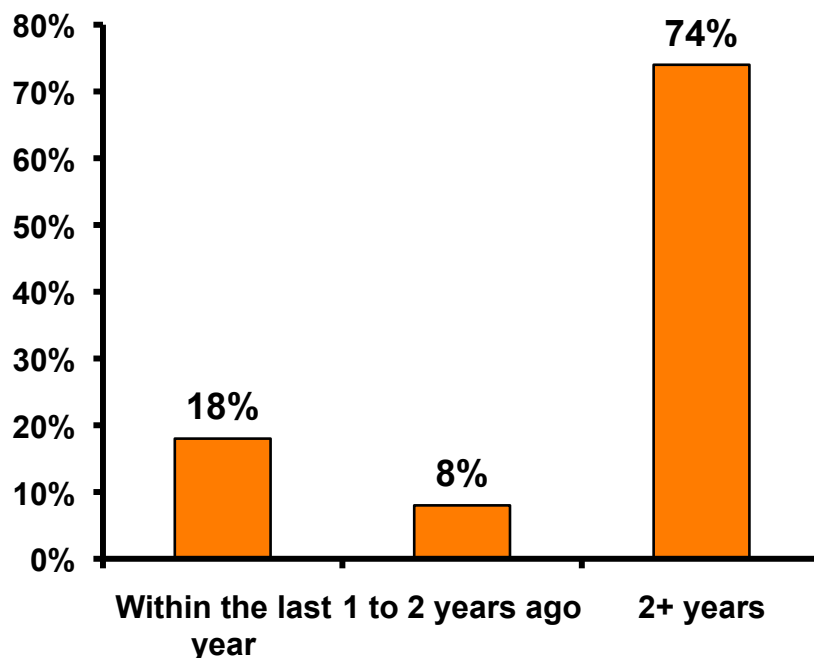
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	177	142	32
			50%	51%	43%
	Female	Count	177	135	42
			50%	49%	57%
Total	Count		354	277	74
AGE	<20	Count	3	1	2
			1%	0%	3%
	20-29	Count	75	67	7
			21%	24%	9%
	30-39	Count	185	143	41
			52%	52%	55%
	40-49	Count	81	60	20
			23%	22%	27%
50+	Count	10	6	4	
		3%	2%	5%	
Total	Count		354	277	74

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

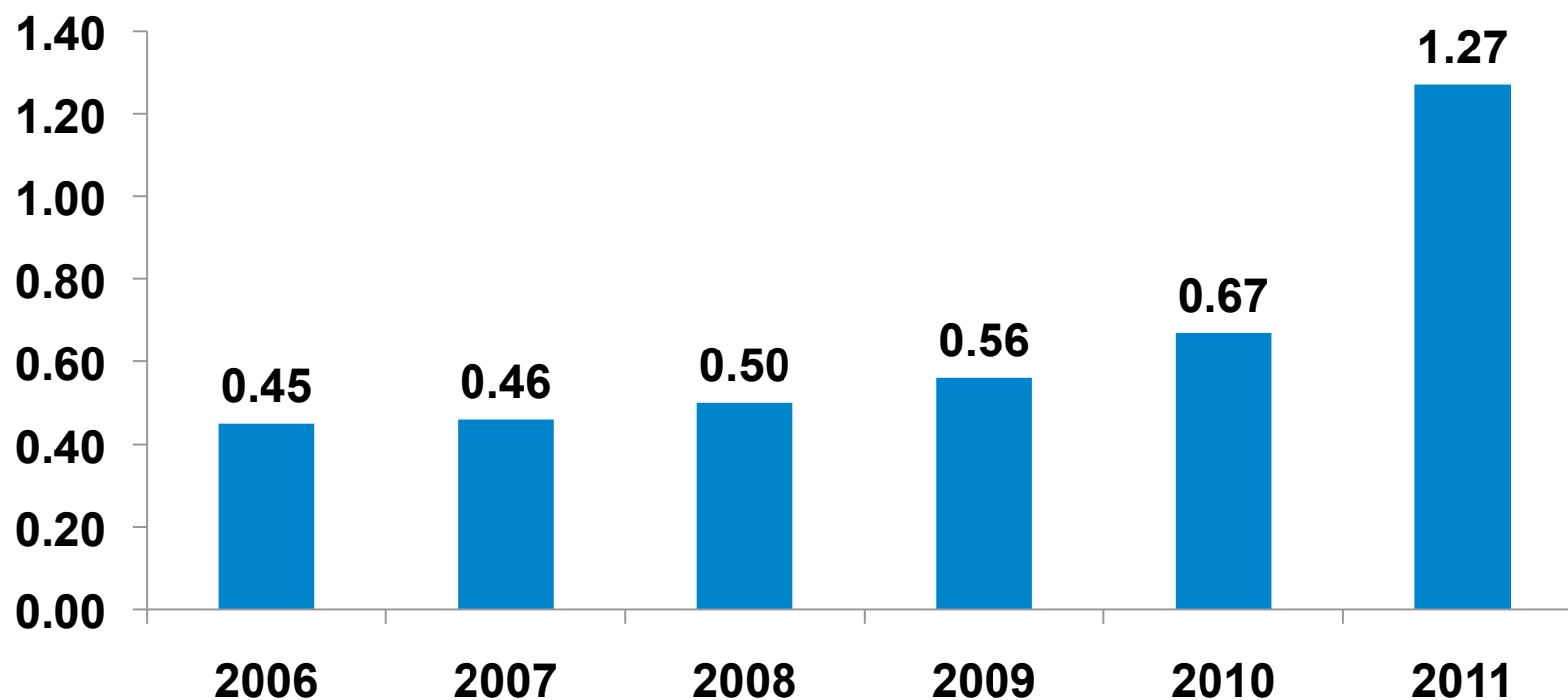
Repeat Visitors Last Trip

n = 72

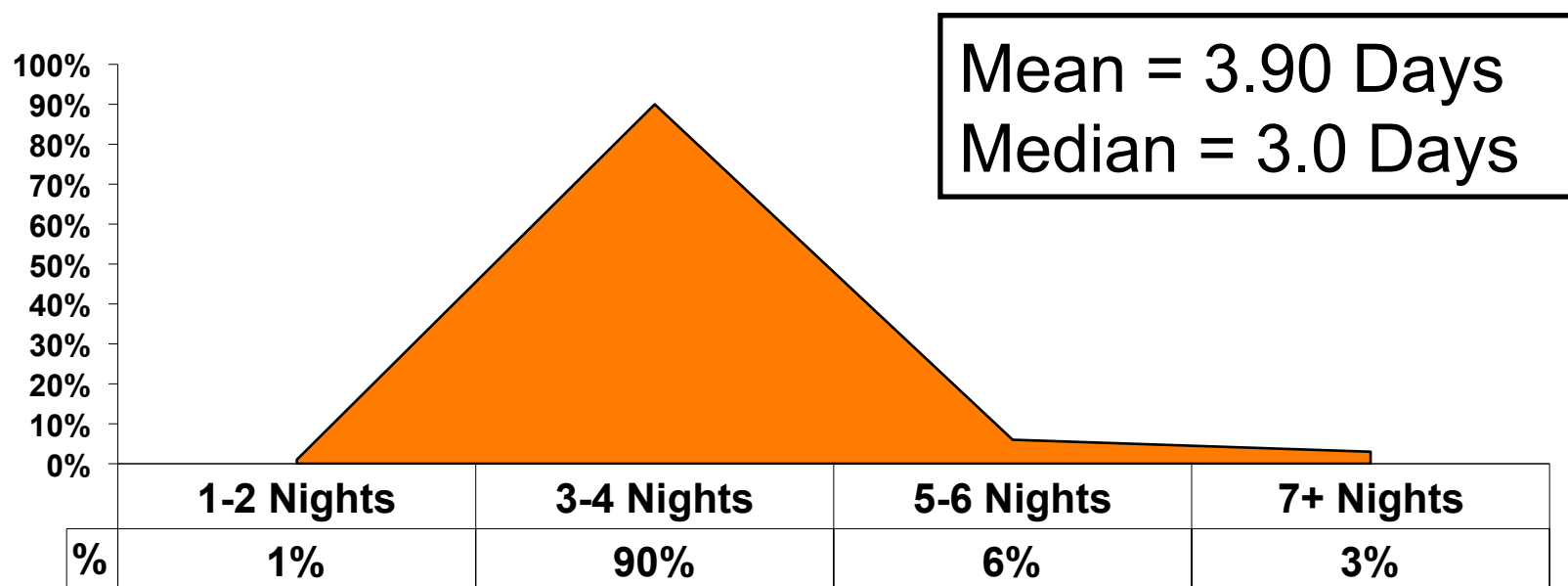


- The average repeat visitor has been to Guam 2.3 times.
- For most repeat visitors it has been at least 2 years since their last visit.

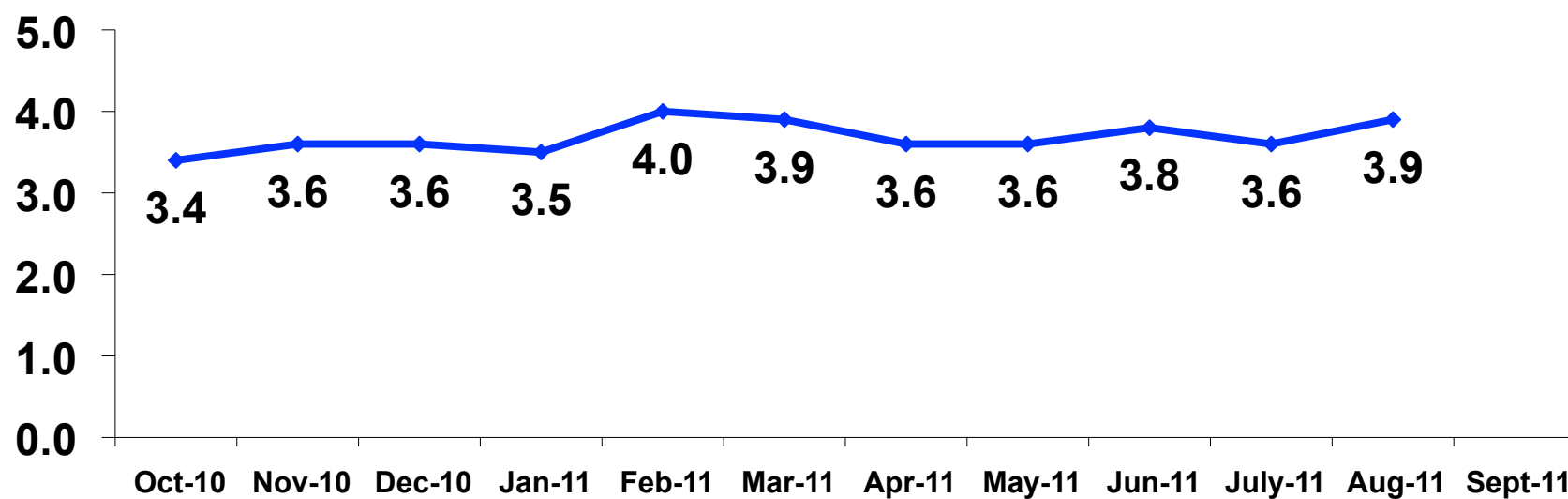
Average Number Overnight Trips (2005-2011) (2 nights or more)



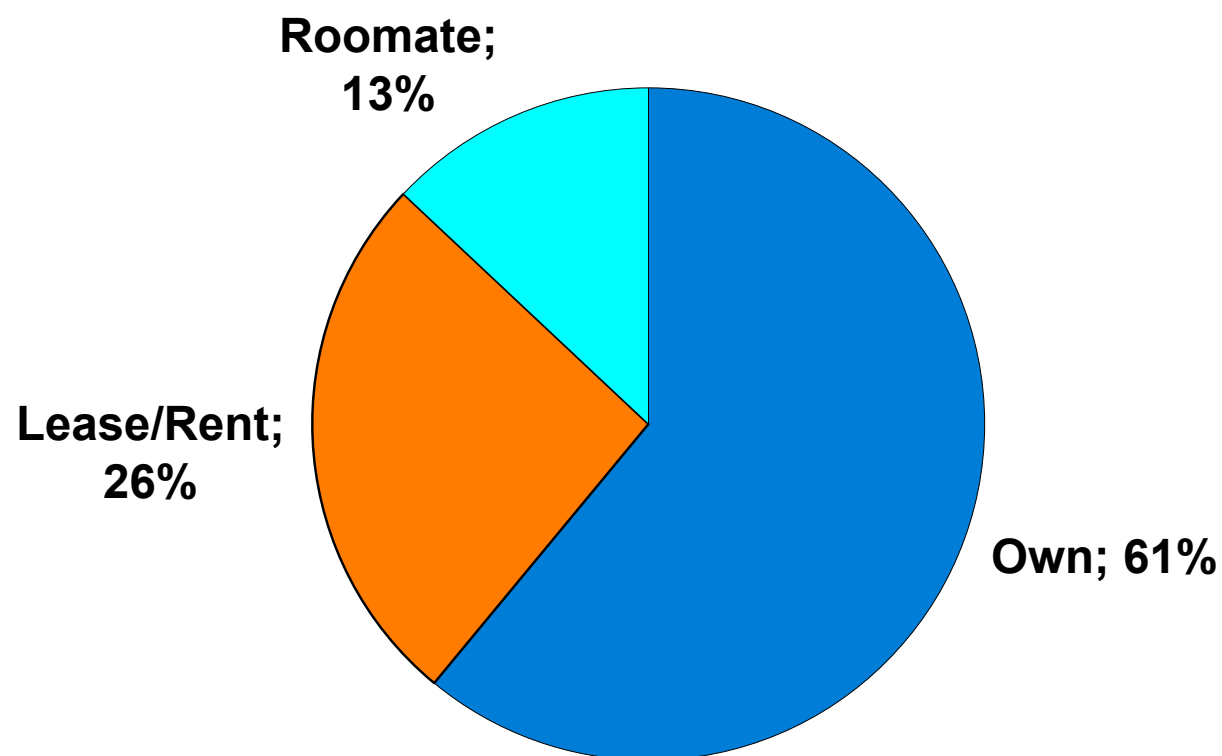
Length of Stay



Average Length of Stay



Living Accommodations

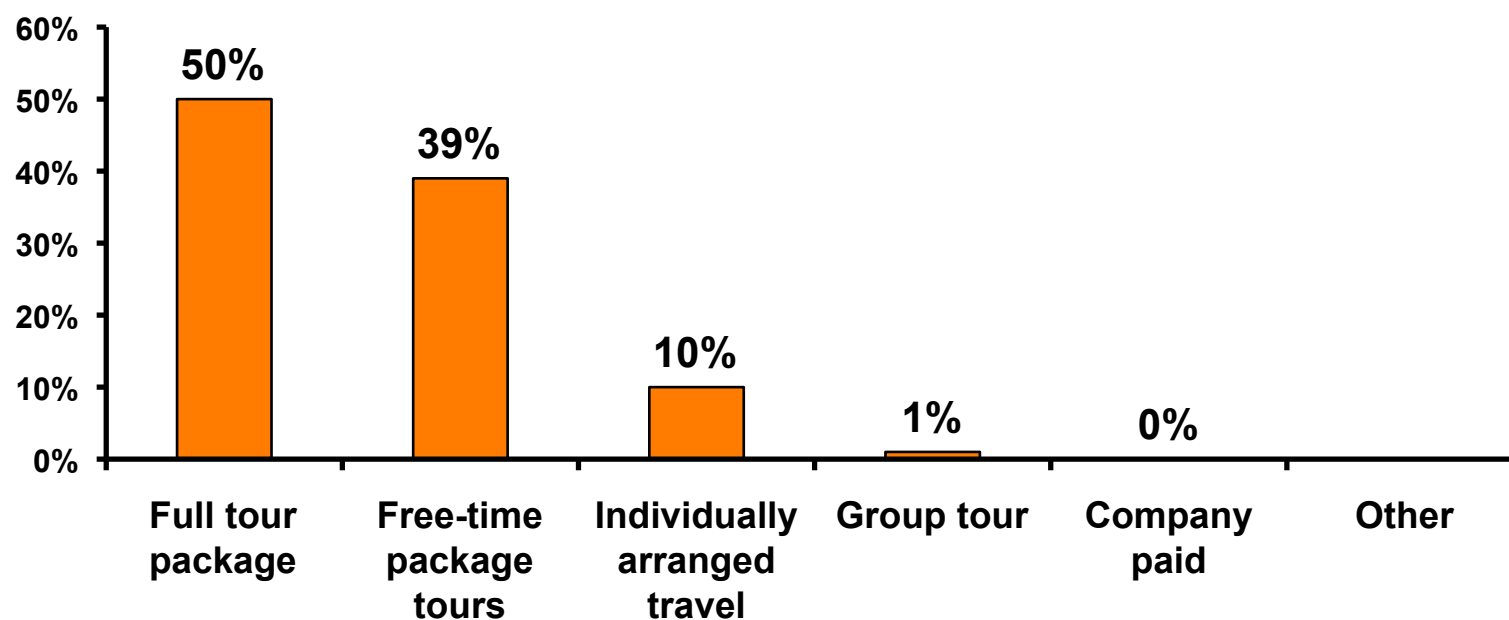


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	36%	28%	35%	46%	34%	
	Self-employed	16%	22%	15%	5%	23%	17%
	Professor/Teacher	11%	33%	15%	9%	8%	
	Homemaker	10%		8%	14%	8%	50%
	Prof/Specialist/Tech	8%	6%	9%	6%	11%	
	Manager	4%		1%	6%	5%	
	Service worker	3%	11%	4%	1%	3%	
	Student	3%		1%	2%	1%	17%
	Sales/Clerical	2%		4%	2%	1%	
	Skilled worker	2%		4%	1%	1%	
	Govt-Mgr	1%			2%	1%	
	Judicial	1%			1%	2%	
	Govt - Office/non-mgr	1%		1%		1%	
	Govt-Exec	1%		1%	1%		
	Free-lancer	1%		1%	1%		
	Other	1%			1%	1%	
	Unemployed	1%					17%
Total	Count	344	18	89	93	119	6

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

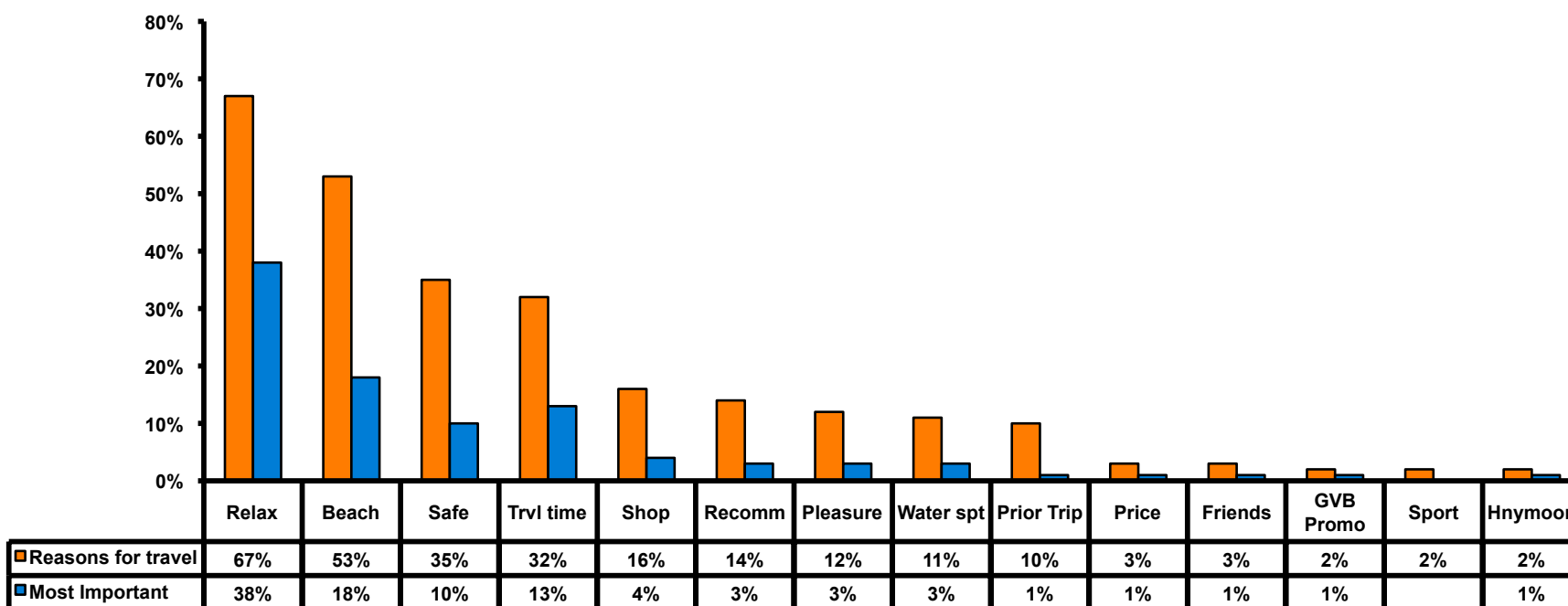


Accommodation by Income

Average length of stay: 3.90 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	47%	24%	46%	41%	53%	50%
	Sheraton Laguna Resort	9%	29%	9%	12%	5%	
	The Westin Resort Guam	8%	5%	8%	5%	10%	17%
	Hyatt Regency Guam	7%		2%	10%	9%	17%
	Hotel Nikko Guam	5%		4%	8%	5%	
	Hilton Guam Resort & Spa	5%	10%	2%	6%	5%	
	Outrigger Guam Resort	4%		4%	6%	3%	17%
	Onward Beach Resort	3%	10%	6%	2%	3%	
	Royal Orchid Guam	2%	5%	4%	3%		
	Holiday Resort Guam	2%	10%	1%	3%	1%	
	Guam Reef Hotel	2%	5%			3%	
	Hotel Sane Fe	1%		3%	1%	1%	
	Relatives, Friends, Home Stay	1%		2%	1%		
	Ramada Suites Guam	1%	5%	2%		1%	
	Apartment	1%		1%	1%		
	Fiesta Resort Guam	1%		1%		1%	
	Bayview Hotel	1%				1%	
	Guam Marriott Resort Hotel	0%		1%			
	Leo Palace Resort	0%		1%			
	Grand Plaza Hotel	0%					
Total	Count	352	21	89	93	119	6

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
- Guam's natural beauty/beaches and
- Short travel time

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	67%	67%	61%	67%	74%	40%	71%	63%
	Beautiful seas, beaches, tropical climate	53%	33%	56%	49%	57%	70%	51%	54%
	It is a safe place to spend a vacation	35%		29%	32%	51%	30%	37%	33%
	Short travel time	32%		36%	34%	23%	30%	27%	36%
	Shopping	16%		23%	17%	9%		15%	16%
	Recommendation of friend, relative, travel agency	14%	33%	16%	15%	12%		10%	18%
	Pleasure	12%	33%	16%	11%	11%	10%	15%	10%
	Water sports	11%		8%	12%	11%	10%	11%	11%
	A previous visit	10%	67%		14%	6%	20%	9%	10%
	Price of the tour package	3%		5%	1%	7%		4%	3%
	To visit friends or relatives	3%	100%	4%	1%	5%		2%	4%
	Other	2%		1%	2%	2%	10%	3%	1%
	Company or Business trip	2%		1%	1%	2%	10%	2%	1%
	Promotional materials from GVB	2%			2%	2%	10%	3%	1%
	Honeymoon	2%		1%	3%			2%	1%
	Organized Sporting Activity	2%		3%	2%	1%		2%	1%
	SCUBA diving	1%		3%	1%	1%		1%	1%
	To golf	1%			2%			1%	1%
	Career certification or testing	1%		1%	1%			1%	1%
	My company sponsored me	0%				1%		1%	
	Convention, Conference, Trade show	0%		1%					1%
	Special promotion	0%		1%					1%
Total	Cases	353	3	75	184	81	10	177	176

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	67%	65%	68%	63%	74%	50%
	Beautiful seas, beaches, tropical climate	53%	60%	44%	54%	61%	33%
	It is a safe place to spend a vacation	35%	15%	29%	32%	45%	67%
	Short travel time	32%	40%	26%	35%	34%	17%
	Shopping	16%	5%	13%	20%	17%	17%
	Recommendation of friend, relative, travel agency	14%	25%	9%	15%	14%	17%
	Pleasure	12%	25%	11%	9%	16%	
	Water sports	11%	15%	8%	9%	15%	
	A previous visit	10%	5%	8%	10%	10%	
	Price of the tour package	3%	5%	3%	4%	3%	
	To visit friends or relatives	3%	5%	3%	1%	2%	
	Other	2%	5%	1%	2%	3%	
	Promotional materials from GVB	2%		1%	1%	3%	
	Organized Sporting Activity	2%	5%	2%		3%	
	Honeymoon	2%		3%	2%		
	Company or Business trip	2%		2%	2%		
	SCUBA diving	1%		1%	2%		
	To golf	1%		1%	1%	1%	
	Career certification or testing	1%		1%		2%	
	My company sponsored me	0%				1%	
	Convention, Conference, Trade show	0%		1%			
	Special promotion	0%				1%	
Total	Cases	353	20	91	93	119	6

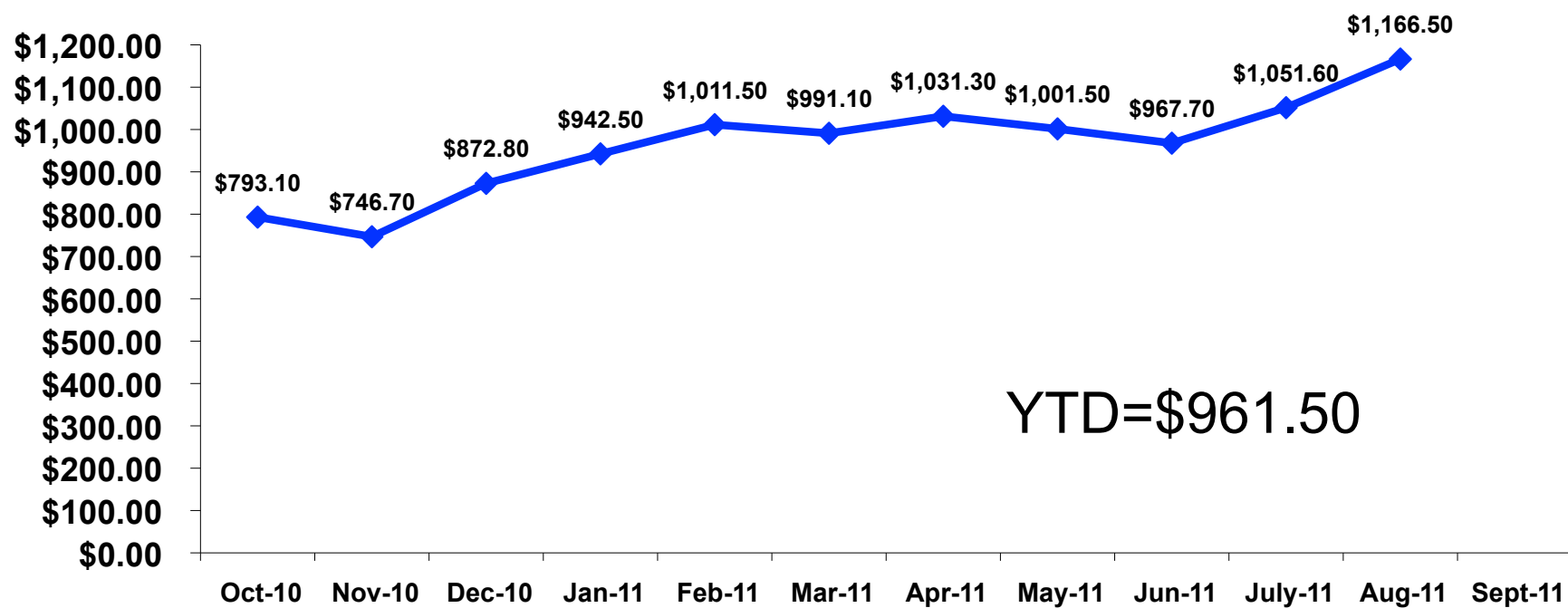
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1065.34/US\$1

- \$3,187.50 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$14,295 = maximum (highest amount recorded for the entire sample)
- \$1,166.50 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

KW1065.34=\$1

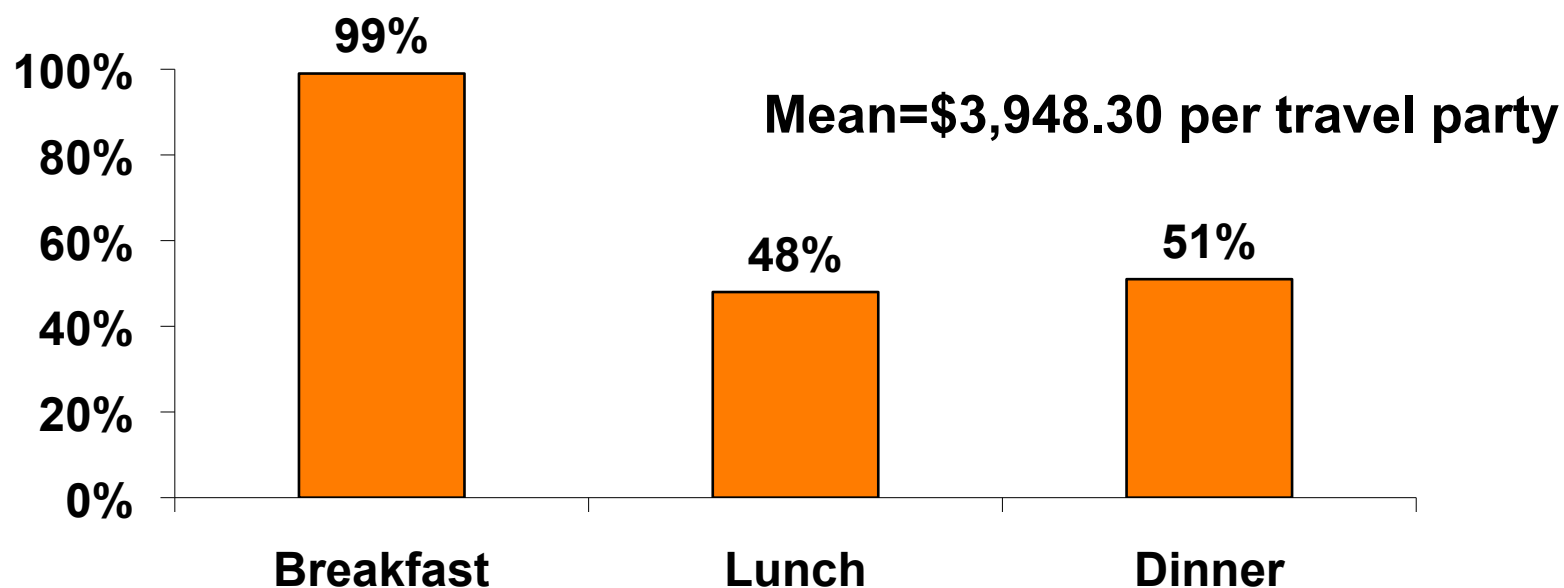
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,519.80
Air & Accommodation w/ daily meal package	\$3,948.30
Air only	\$1,842.50
Accommodation only	\$1,220.30
Accommodation w/ daily meal only	\$1,112.00
Food & Beverages in Hotel	\$207.40
Ground transportation – Korea	\$77.80
Ground transportation – Guam	\$94.40
Optional tours/ activities	\$329.90
Other expenses	\$541.30
Total Prepaid	\$3,187.50

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

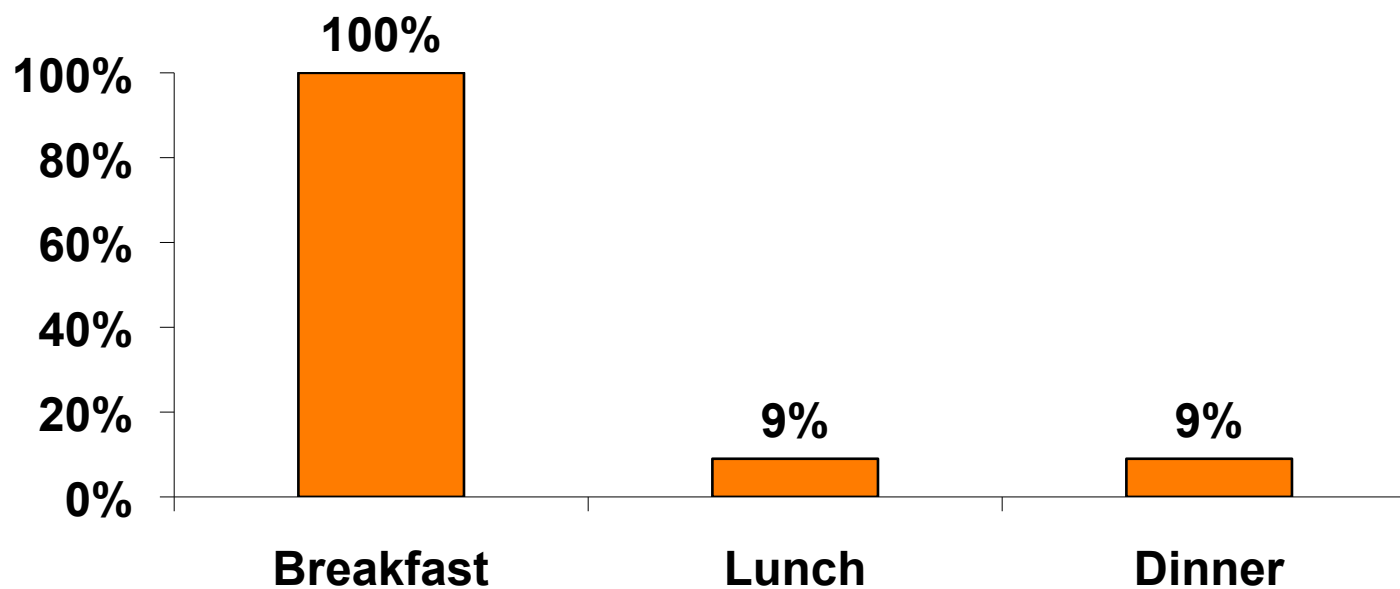
n=221



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

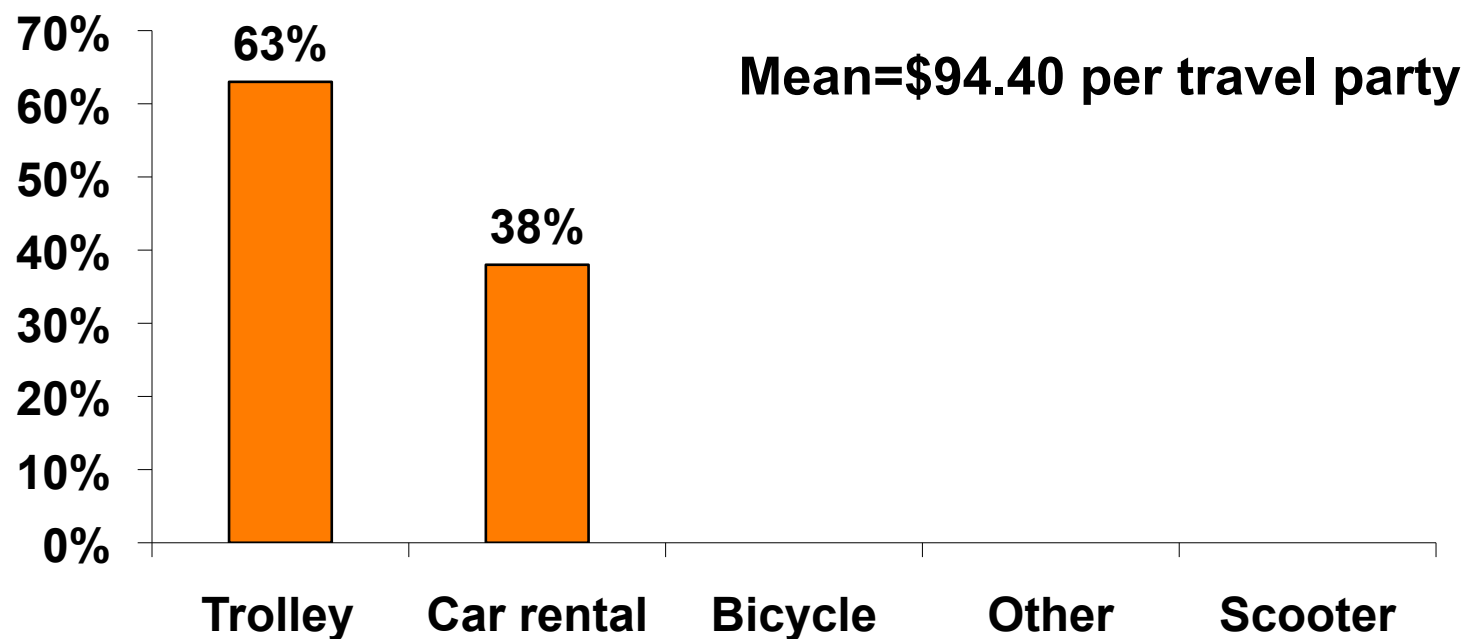
n= 11



Mean= \$1,112.00 per travel party

Prepaid Ground Transportation

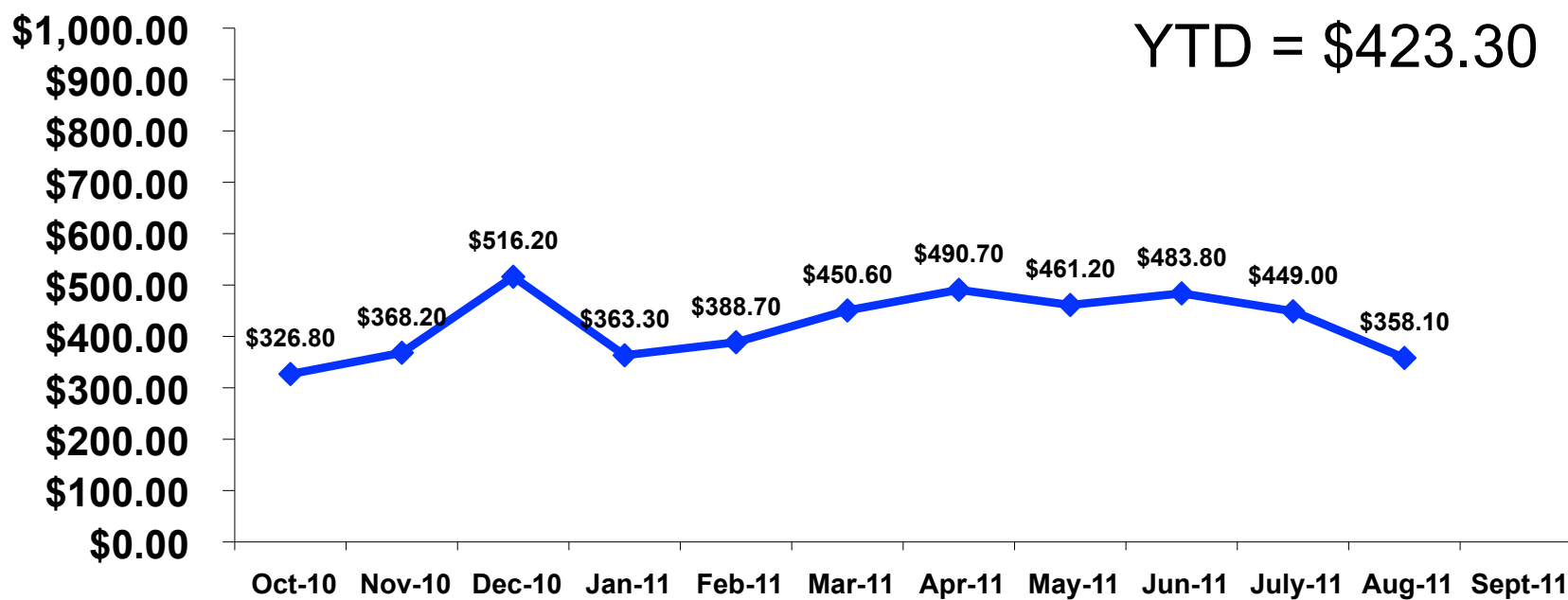
n=8



On-Island Expenditures

- \$860.50 = 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)
- \$358.10 = overall mean average per person on-island expenditure

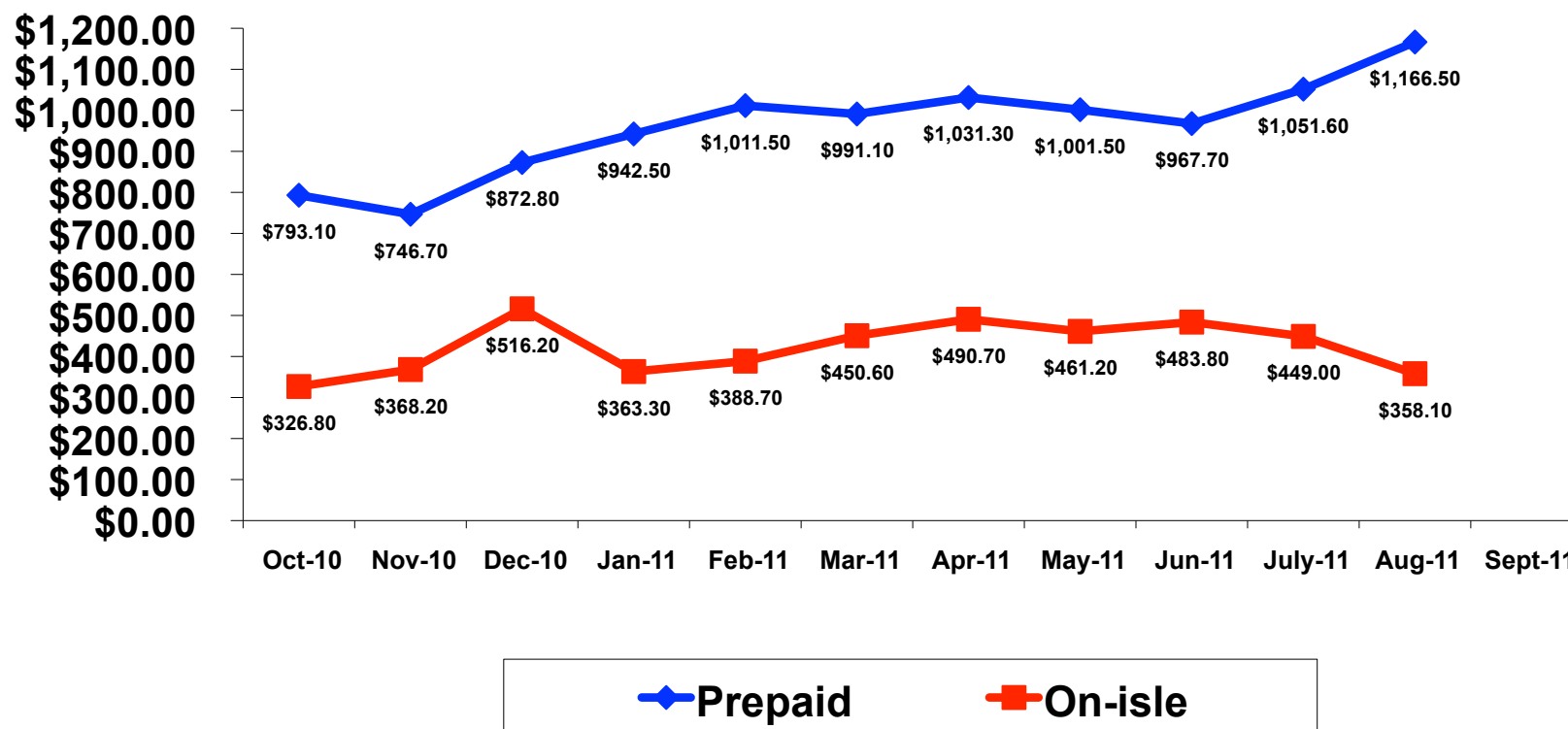
On-Island Expenditures



Prepaid / On-Island Expenditures

Prepaid YTD=\$961.50

On-Island YTD = \$423.30



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER									
					Male					Female				
					AGE					AGE				
					<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$860.49	\$1,023.58	\$697.41	\$500.00	\$1,047.27	\$1,068.75	\$967.39	\$916.67	\$0.00	\$725.30	\$677.53	\$790.67	\$330.00
	Median	\$600	\$800	\$500	\$500	\$800	\$900	\$620	\$250	\$0	\$500	\$500	\$410	\$60

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$37.03	\$43.33	\$30.73	\$33.33	\$33.65	\$37.95	\$42.77	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$31.27	\$41.94	\$20.59	\$6.67	\$10.13	\$40.54	\$33.93	\$4.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$58.27	\$69.23	\$47.30	\$0.00	\$66.63	\$71.18	\$28.89	\$12.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$107.88	\$129.47	\$86.28	\$0.00	\$84.40	\$103.02	\$151.85	\$50.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$224.21	\$290.67	\$157.75	\$10.00	\$178.01	\$255.11	\$213.01	\$154.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$82.95	\$101.43	\$64.47	\$10.00	\$90.67	\$83.17	\$63.54	\$200.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$39.07	\$45.41	\$32.73	\$0.00	\$52.56	\$41.06	\$27.20	\$9.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$285.78	\$311.24	\$260.16	\$273.33	\$303.69	\$243.09	\$372.26	\$253.00
	Median	\$43	\$60	\$30	\$0	\$40	\$40	\$65	\$0
TOTAL ON ISLAND	Mean	\$860.49	\$1,023.58	\$697.41	\$333.33	\$819.75	\$874.20	\$908.48	\$682.00
	Median	\$600	\$800	\$500	\$0	\$622	\$670	\$580	\$135

On-Island Expenditures

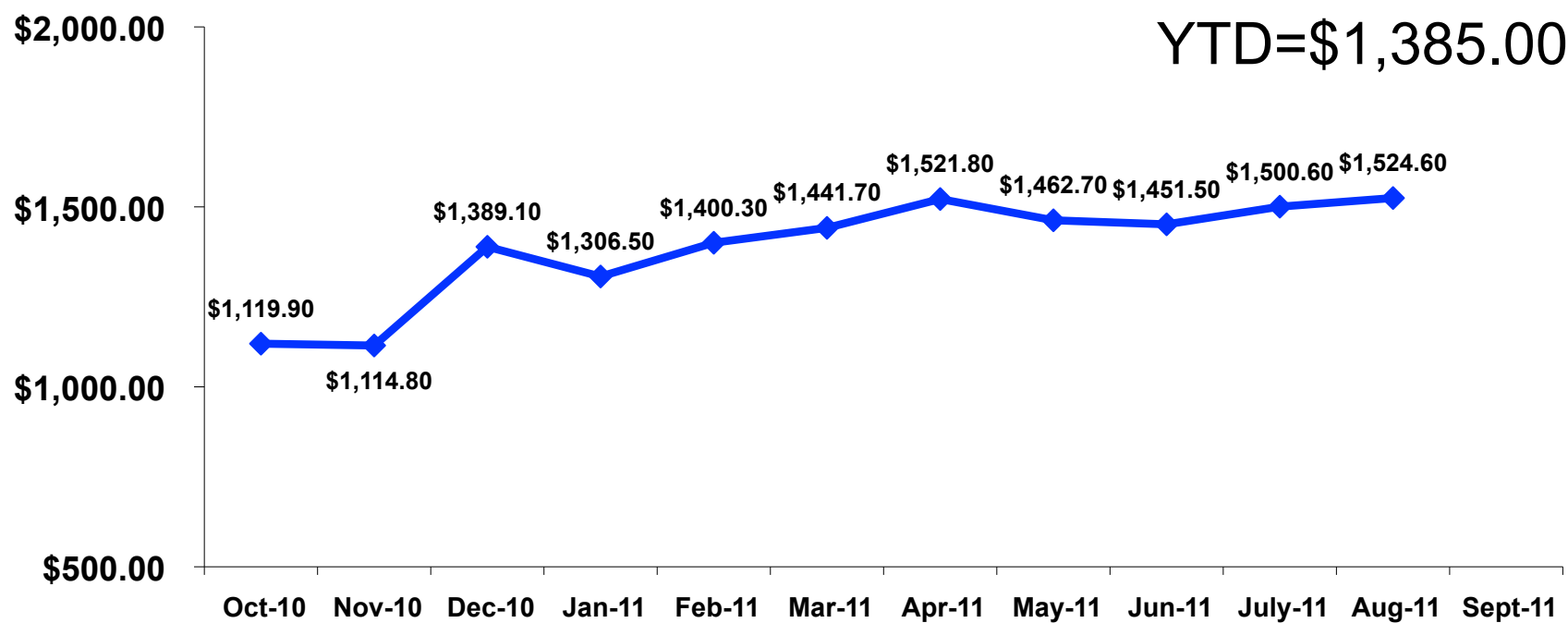
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$28.59	\$70.12
	Median	\$0	\$0
F&B-FF	Mean	\$29.13	\$40.54
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$52.66	\$78.24
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$109.22	\$107.23
TOUR	Median	\$0	\$0
GIFT/	Mean	\$223.65	\$226.76
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$86.95	\$70.00
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$39.41	\$37.24
	Median	\$0	\$0
OTHER EXP	Mean	\$277.85	\$313.42
	Median	\$43	\$47
TOTAL ON	Mean	\$839.97	\$943.15
ISLAND	Median	\$600	\$621

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,524.60 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,727 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

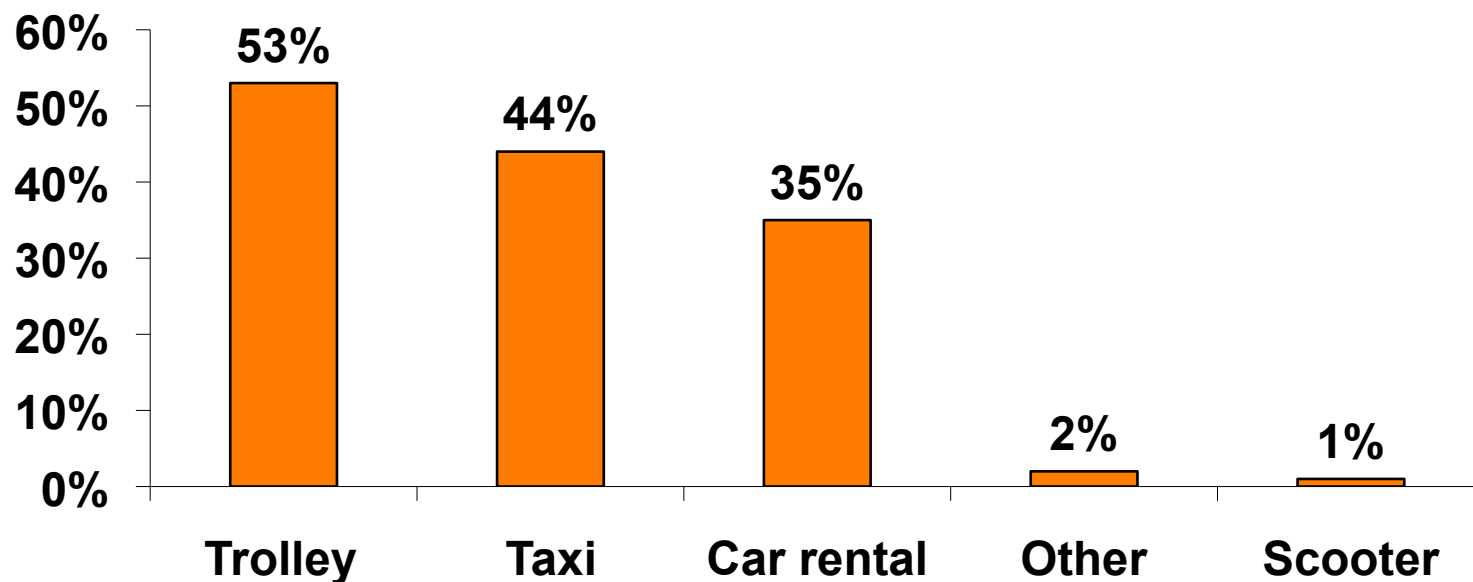


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$37.00
Food & beverage in fast food restaurant/ convenience store	\$31.30
Food & beverage at restaurants or drinking establishments outside a hotel	\$58.30
Optional tours and activities	\$107.90
Gifts/ souvenirs for yourself/companions	\$224.20
Gifts/ souvenirs for friends/family at home	\$82.90
Local transportation	\$39.10
Other expenses not covered	\$285.80
Average Total	\$860.50

Local Transportation

n=133



Mean=\$39.10 per travel party

Guam Airport Expenditures

- \$44.50 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,400 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

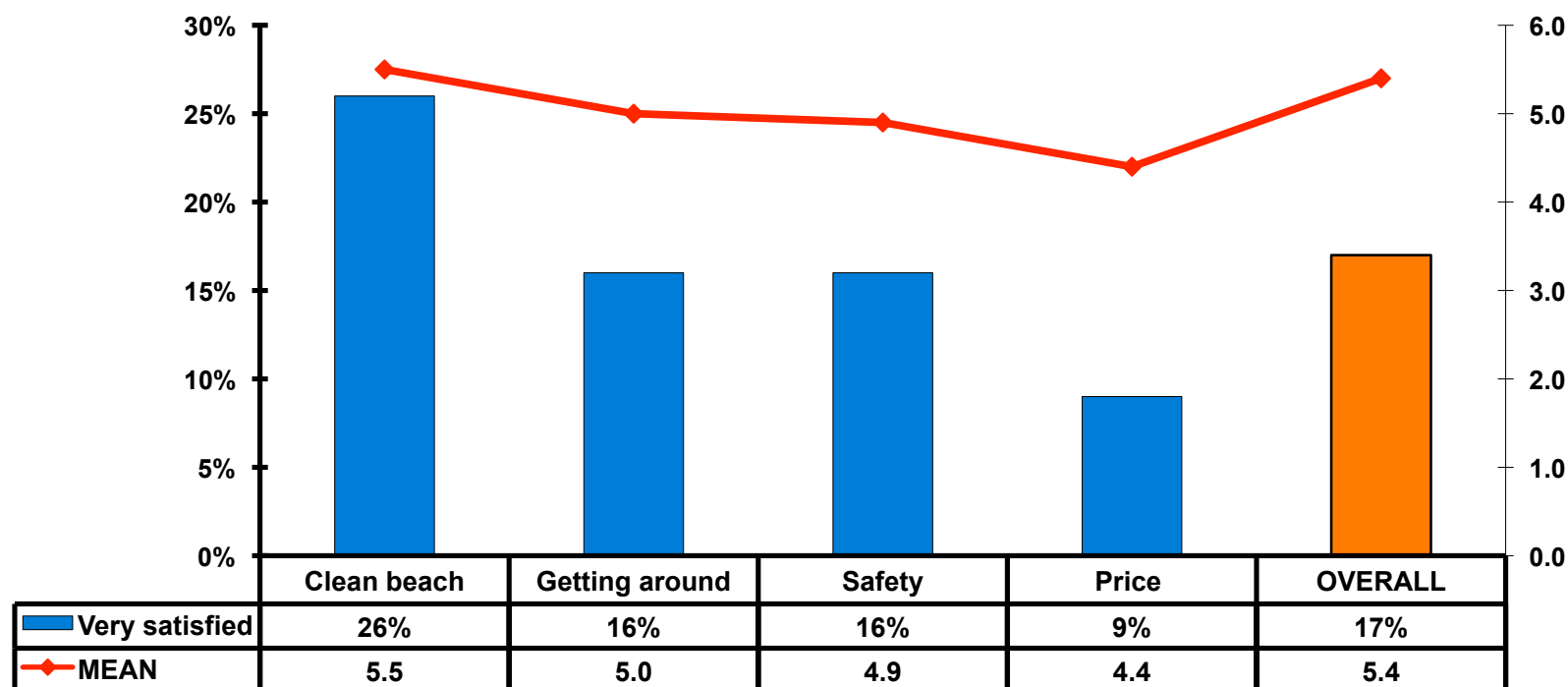
	MEAN \$
Food & Beverages	\$6.40
Gifts/Souvenirs Self	\$25.50
Gifts/Souvenirs Others	\$12.90
Total	\$44.50

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

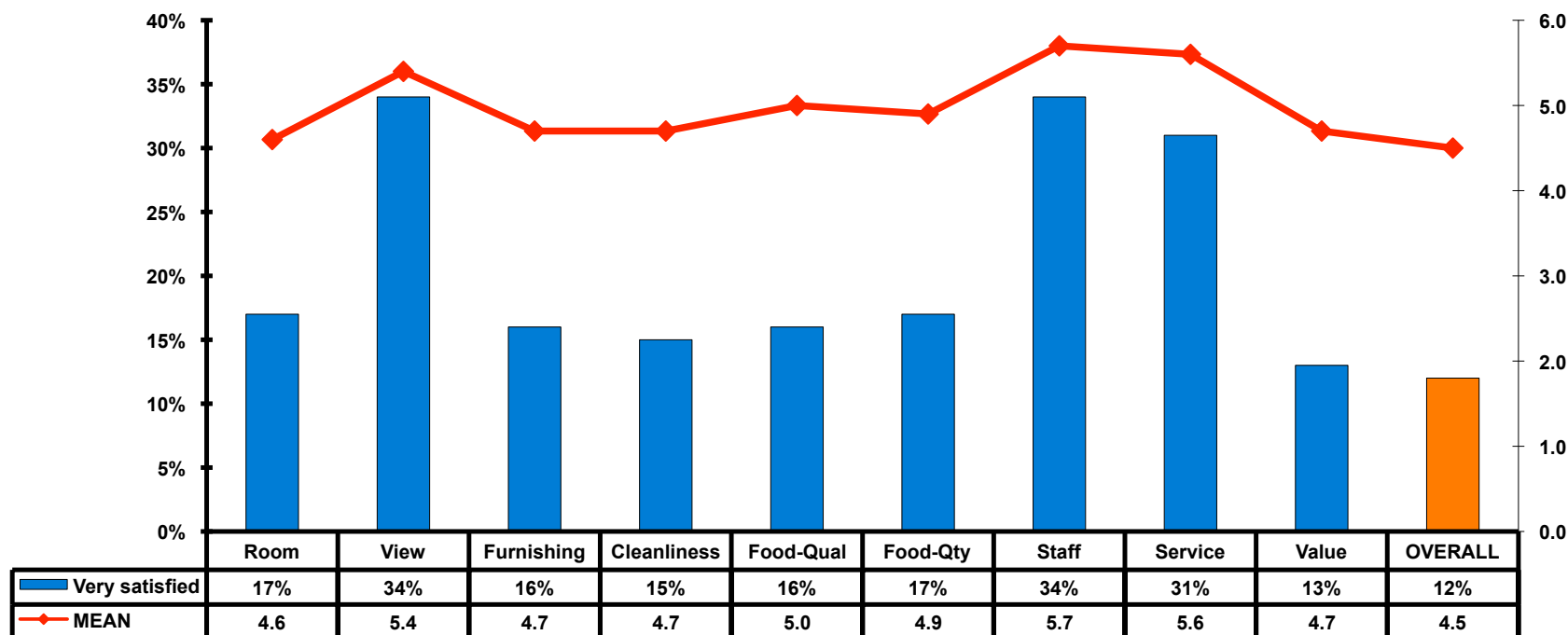
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

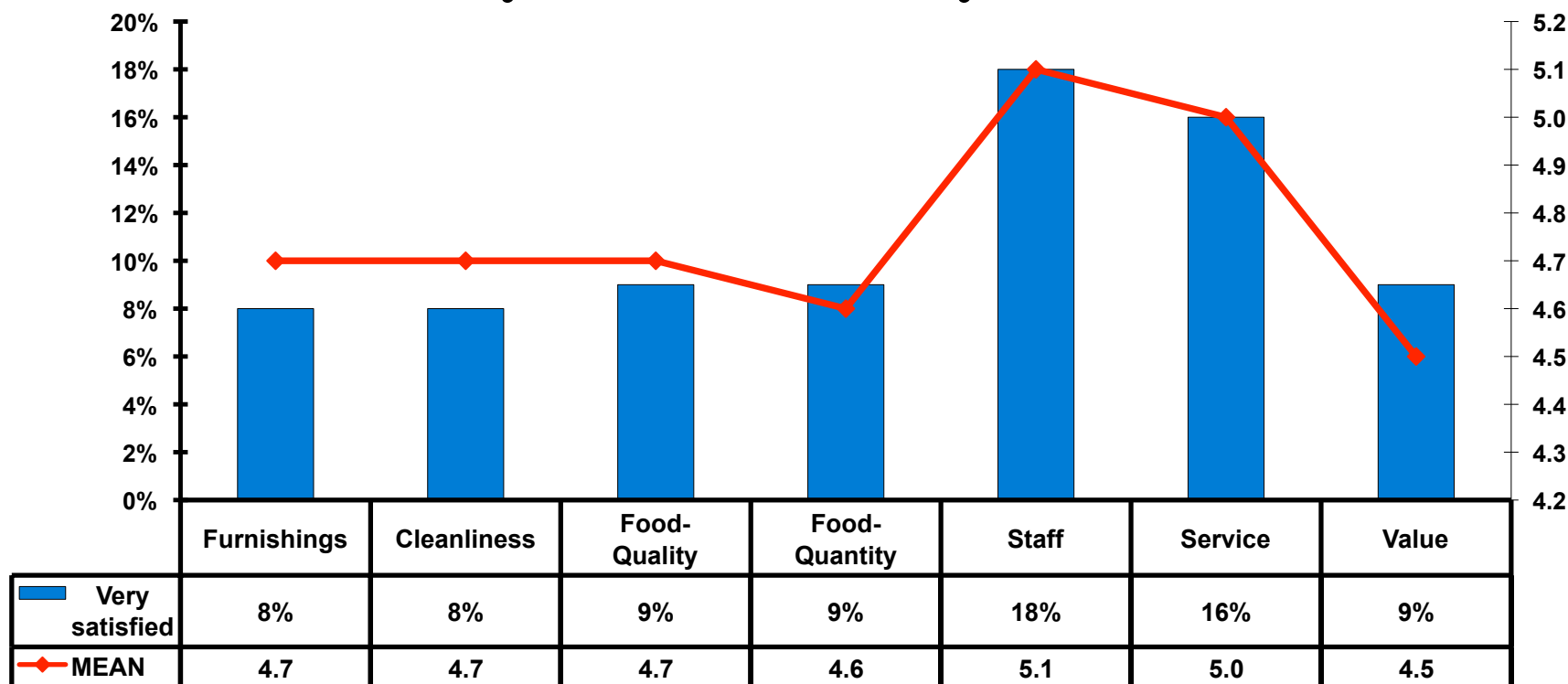
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

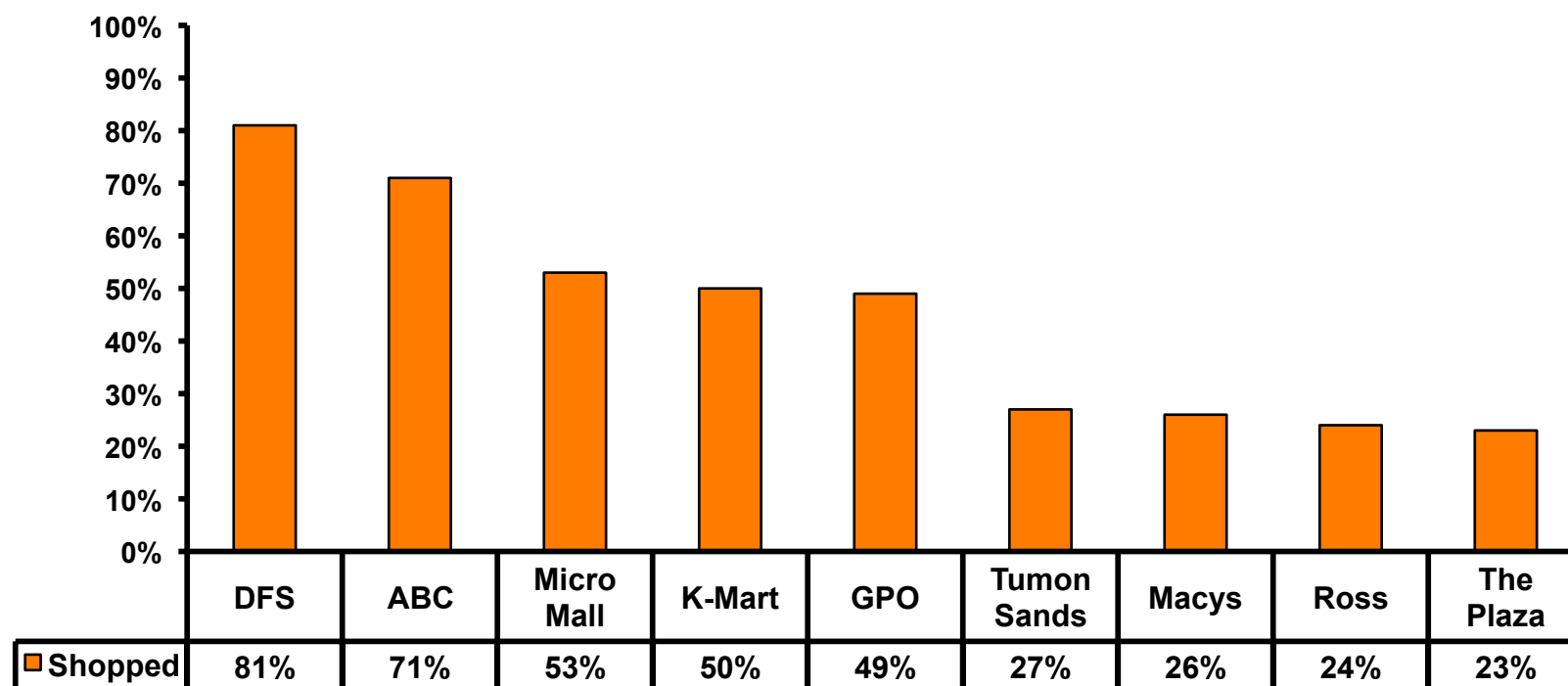
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

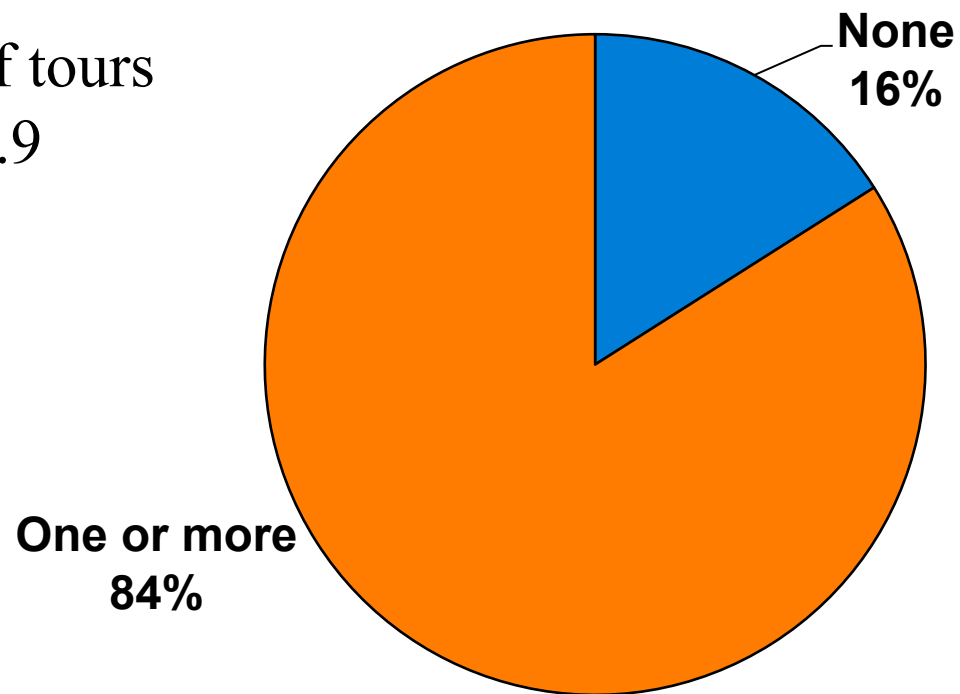
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 44%	Score of 6 to 7 = 39%
Score of 4 to 5 = 50%	Score of 4 to 5 = 49%
Score 1 to 3 = 7%	Score 1 to 3 = 11%
MEAN = 5.2	MEAN = 5.0

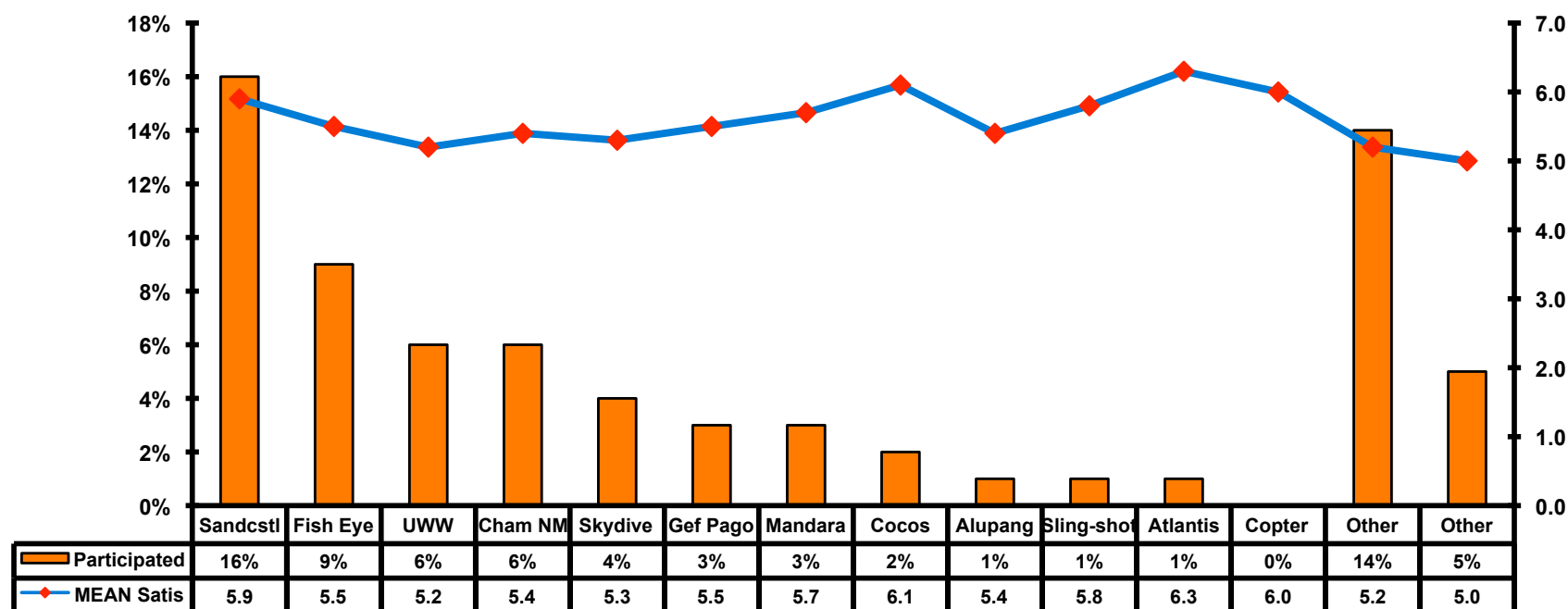
Optional Tour Participation

- Average number of tours participated in is 1.9



Optional Tours

Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 44%	Score of 6 to 7 = 30%
Score of 4 to 5 = 59%	Score of 4 to 5 = 55%
Score 1 to 3 = 8%	Score 1 to 3 = 15%
MEAN = 4.9	MEAN = 4.7

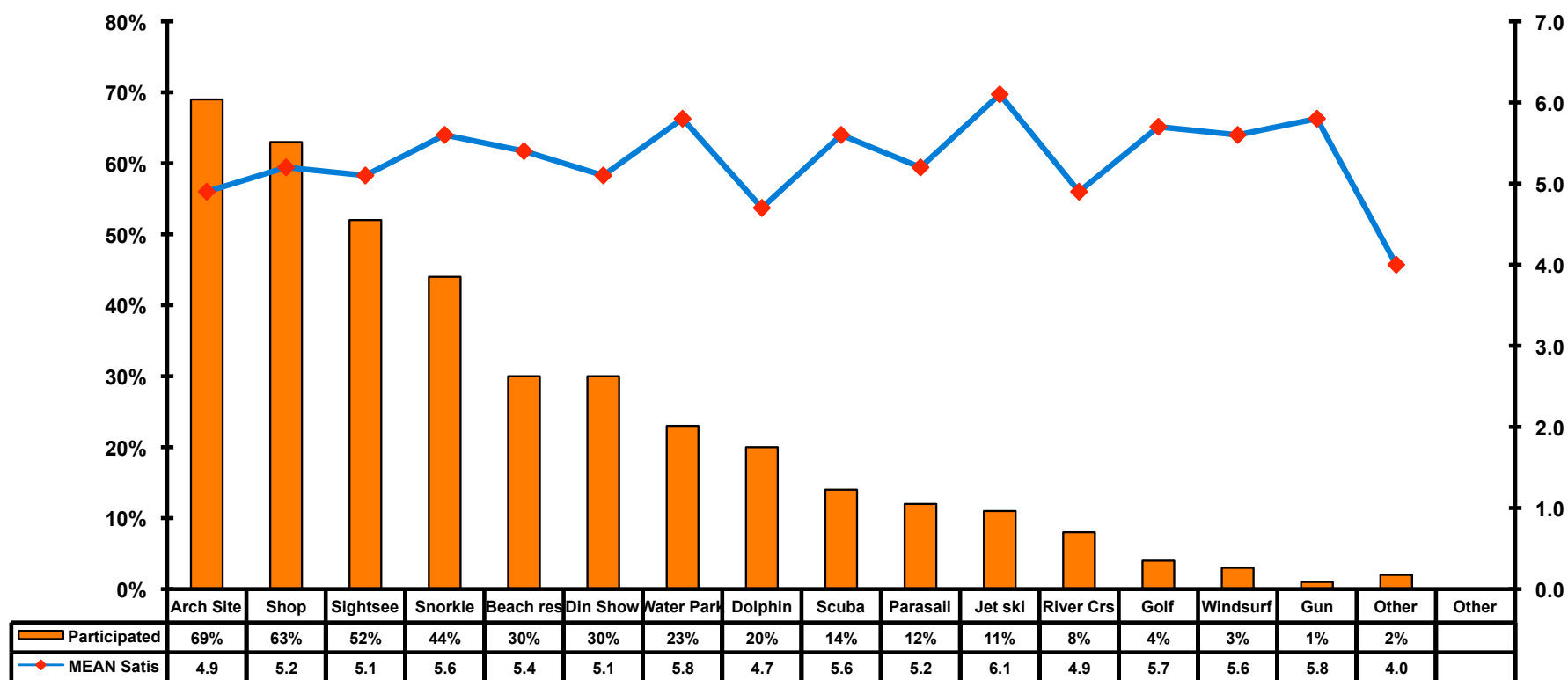
Night Tours Satisfaction

7pt Rating Scale

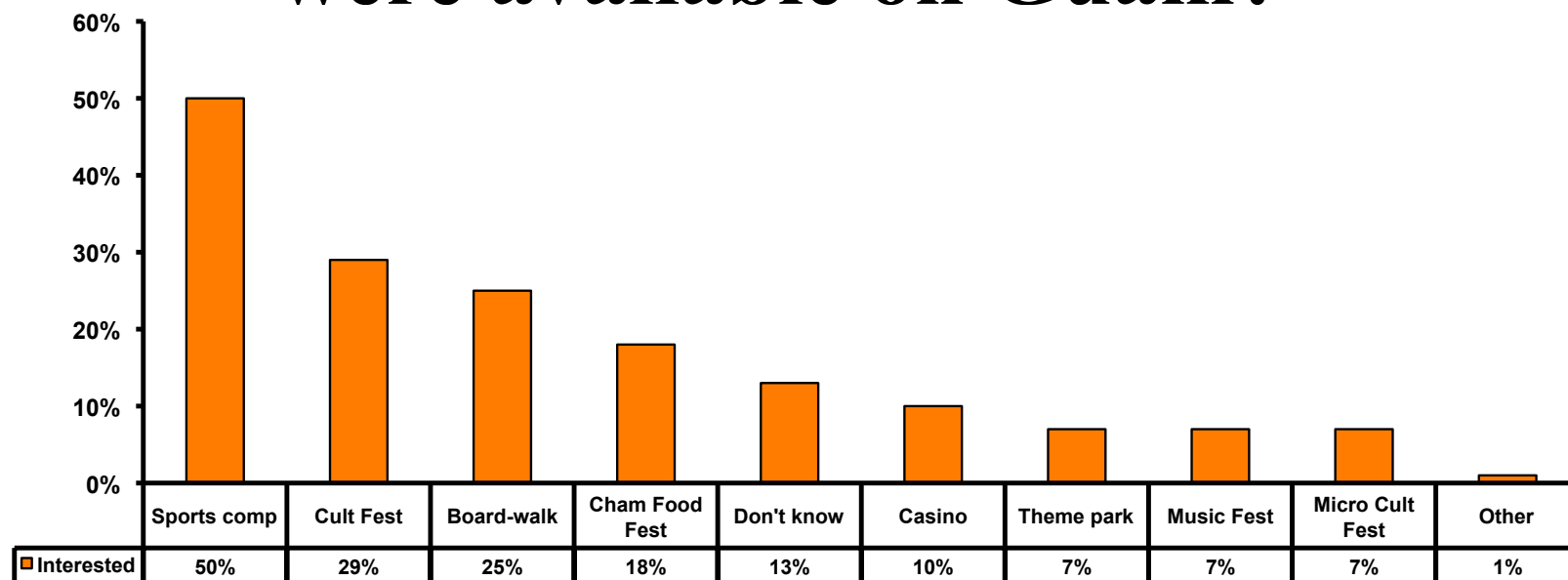
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 22%	Score of 6 to 7 = 20%
Score of 4 to 5 = 63%	Score of 4 to 5 = 59%
Score 1 to 3 = 15%	Score 1 to 3 = 20%
MEAN = 4.4	MEAN = 4.3

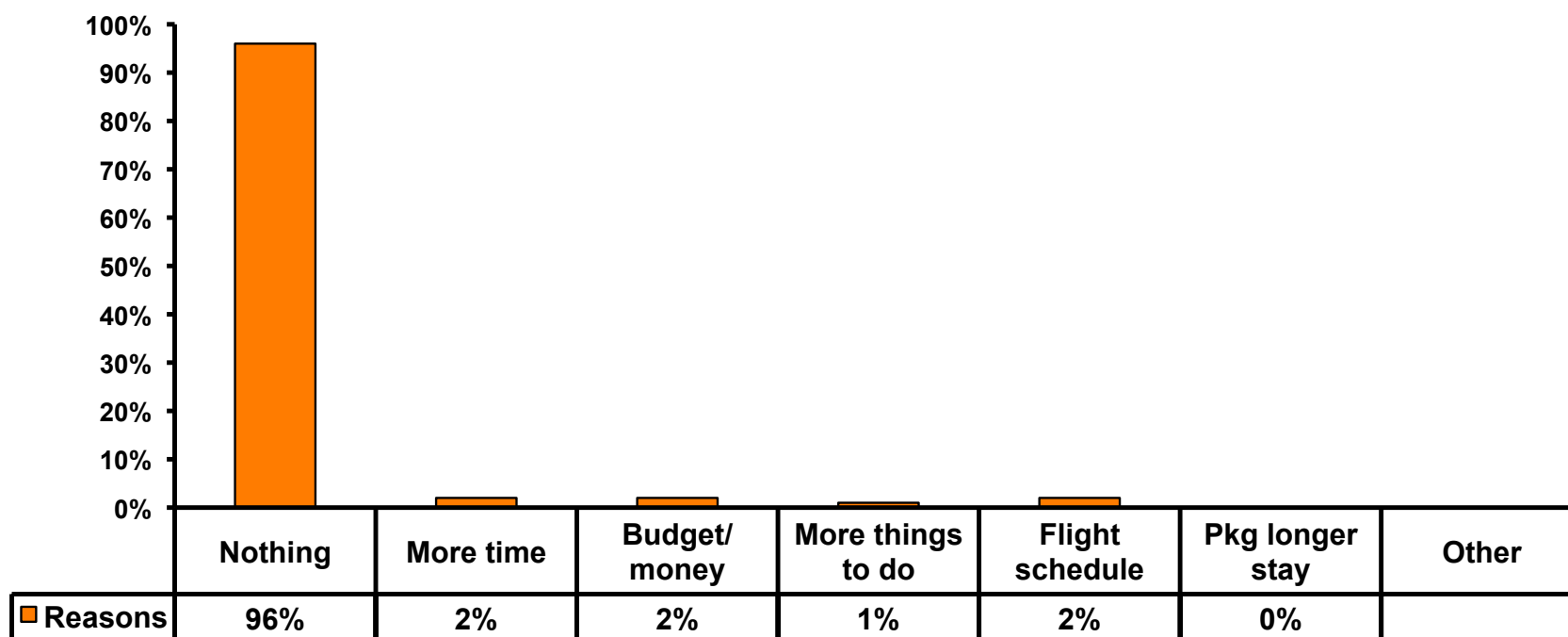
Satisfaction with Other Activities



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



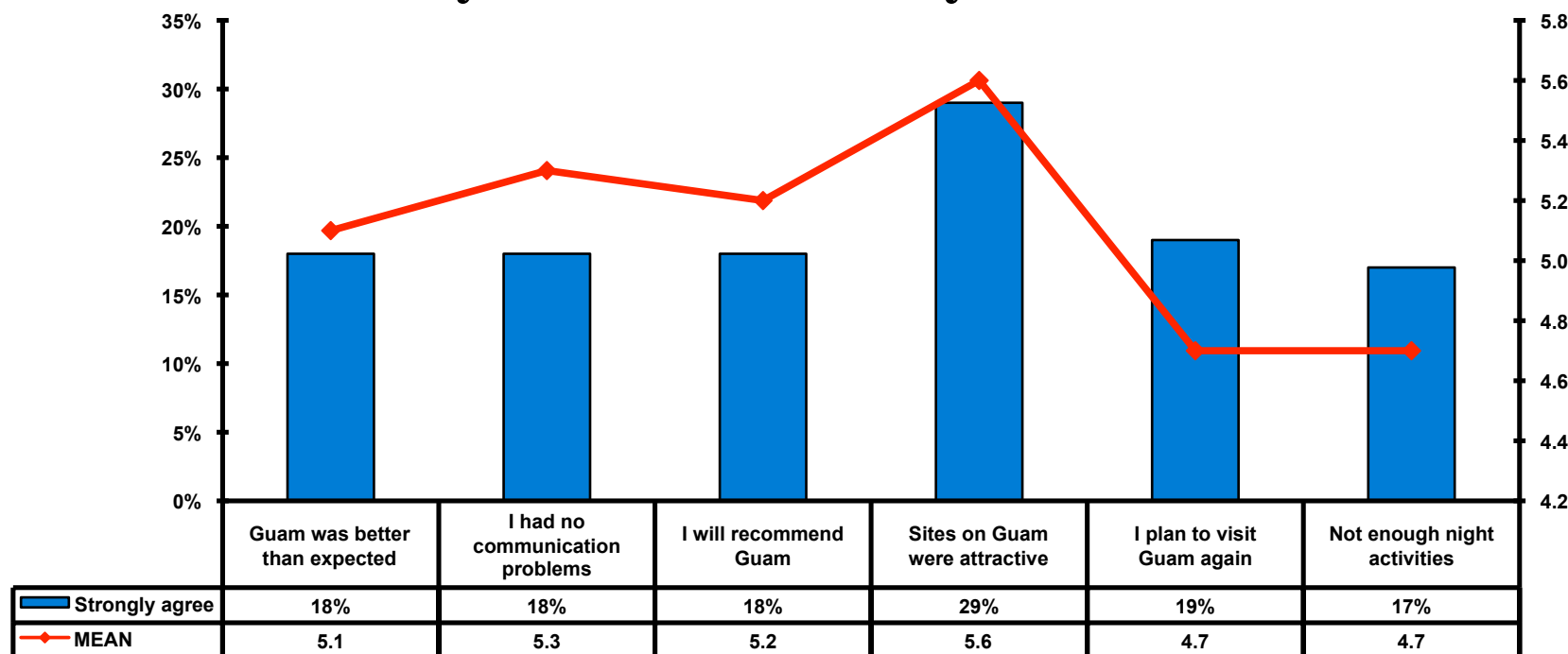
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

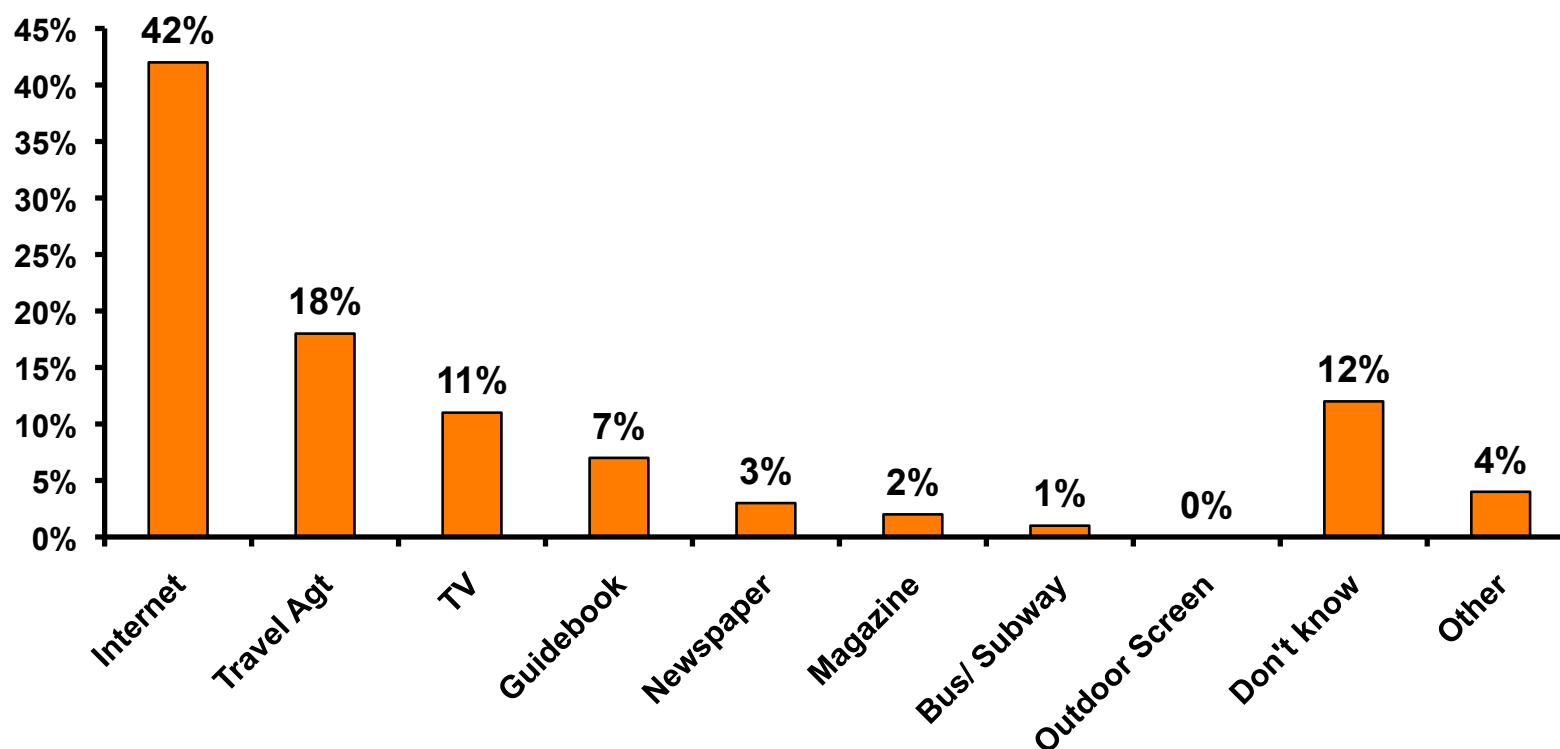
7=Very Satisfied/ 1=Very Dissatisfied



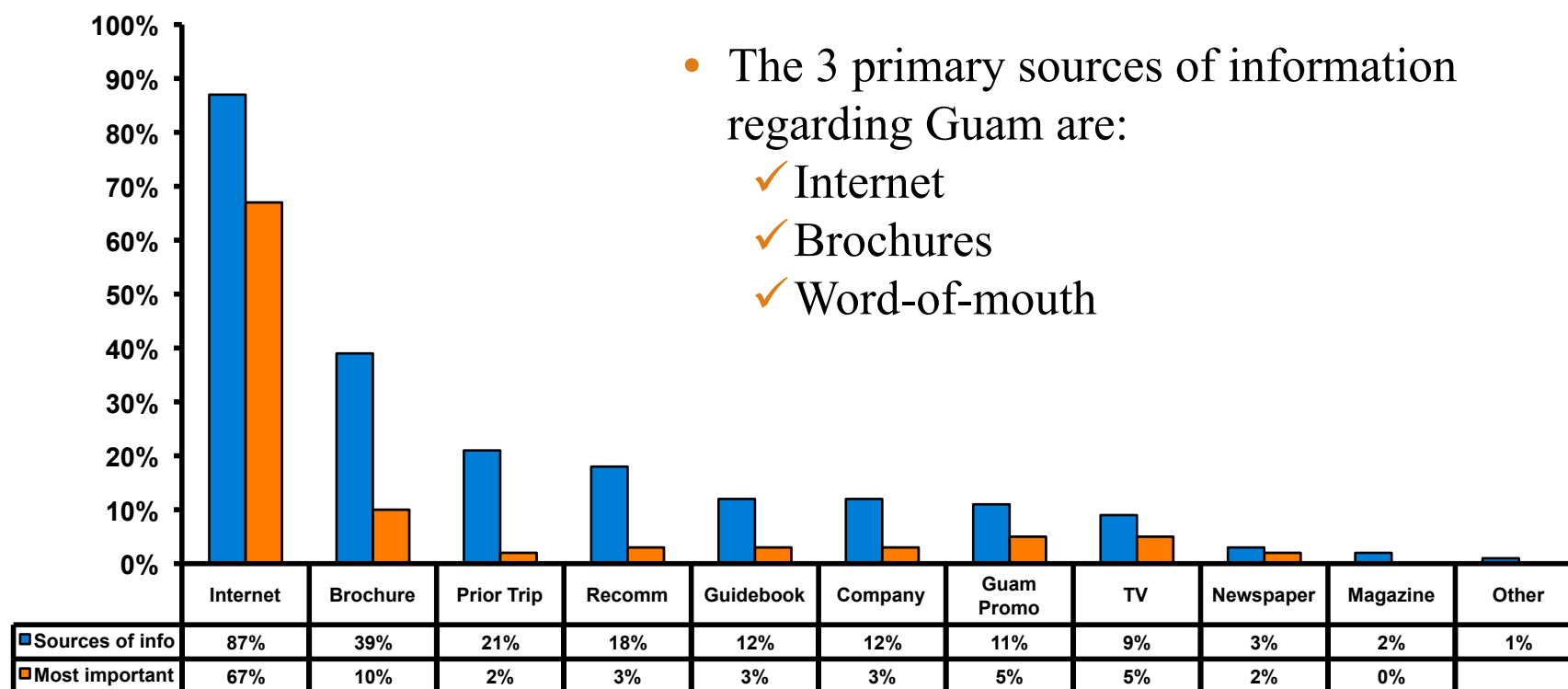
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

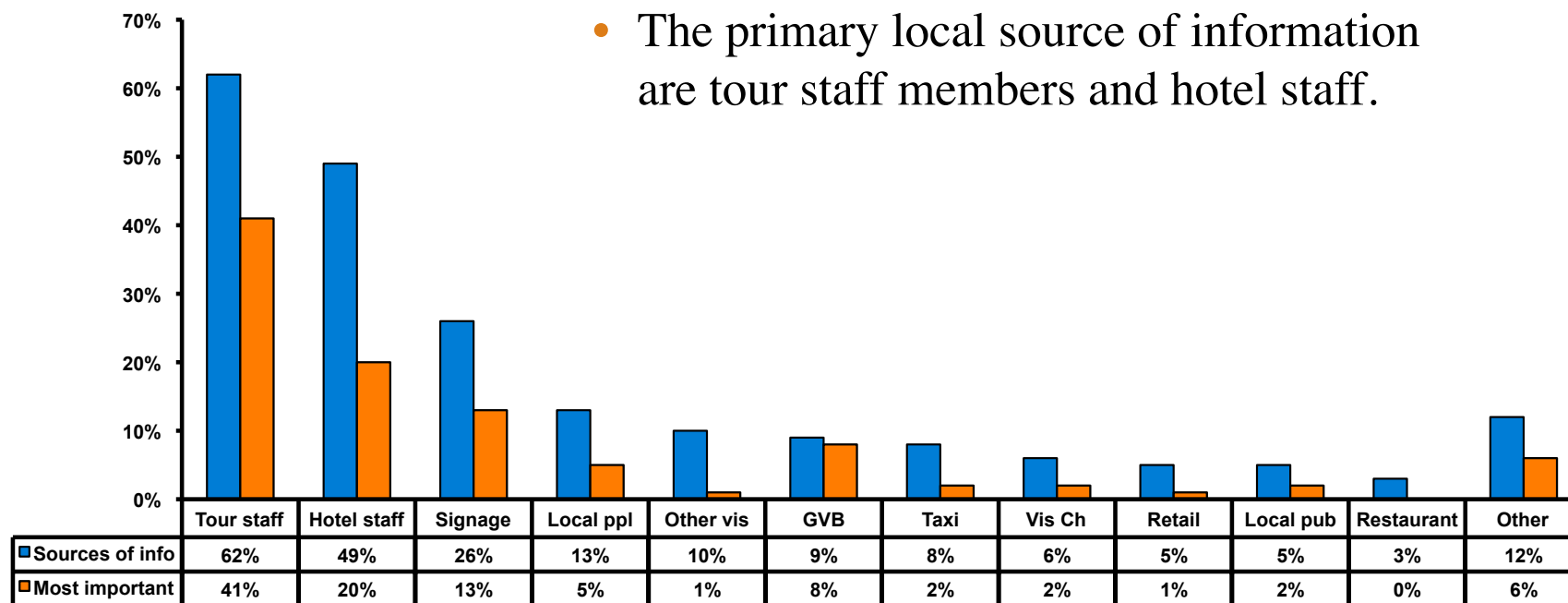


Sources of Information Pre-arrival



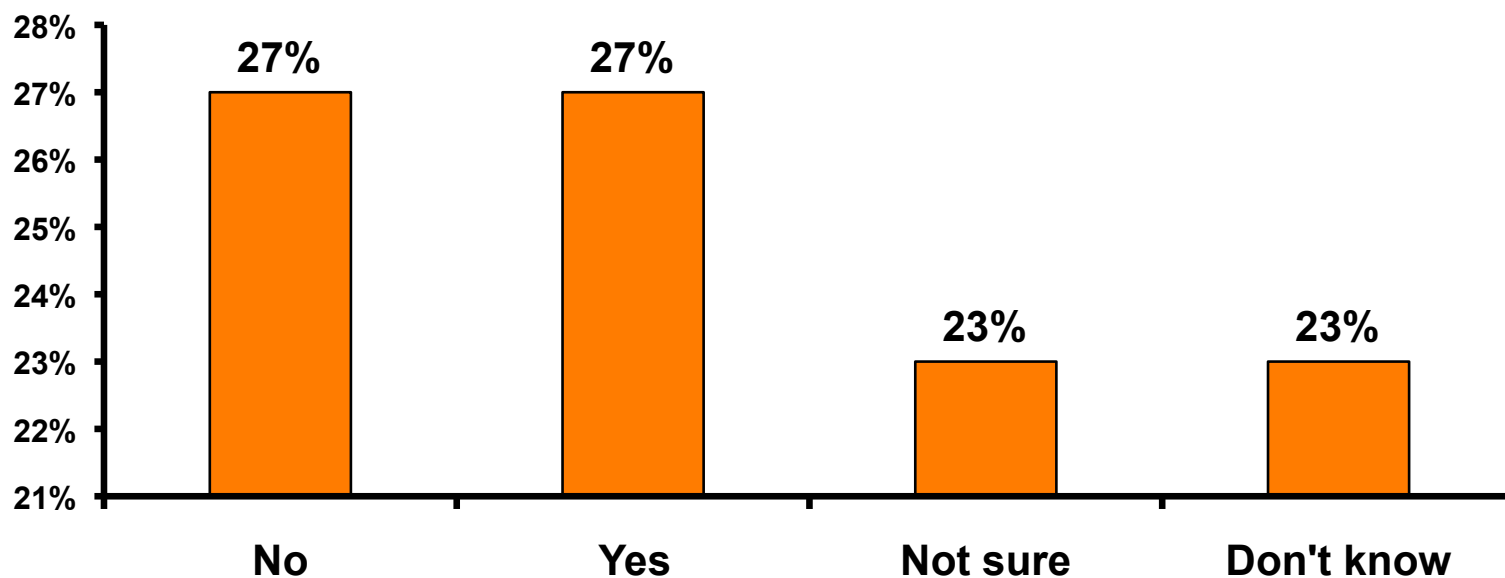
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

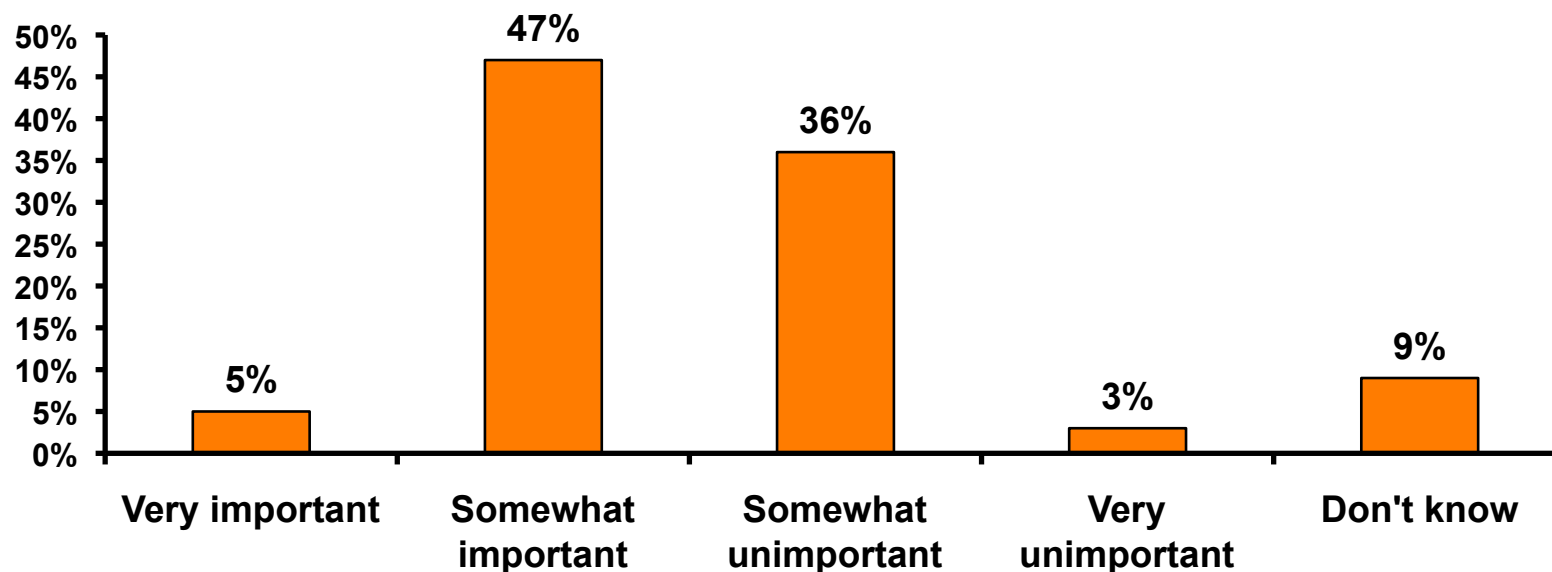
Good time to spend money on travel outside of Korea - Overall



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	33%	19%	29%	31%	33%	29%	25%	24%	31%	33%
	Yes	33%	29%	26%	26%	33%	19%	24%	31%	29%	50%
	Not sure	33%	19%	24%	23%	22%	33%	22%	25%	23%	
	Do not know		33%	21%	20%	11%	19%	29%	20%	18%	17%
Total	Count	3	75	185	81	9	21	91	93	119	6

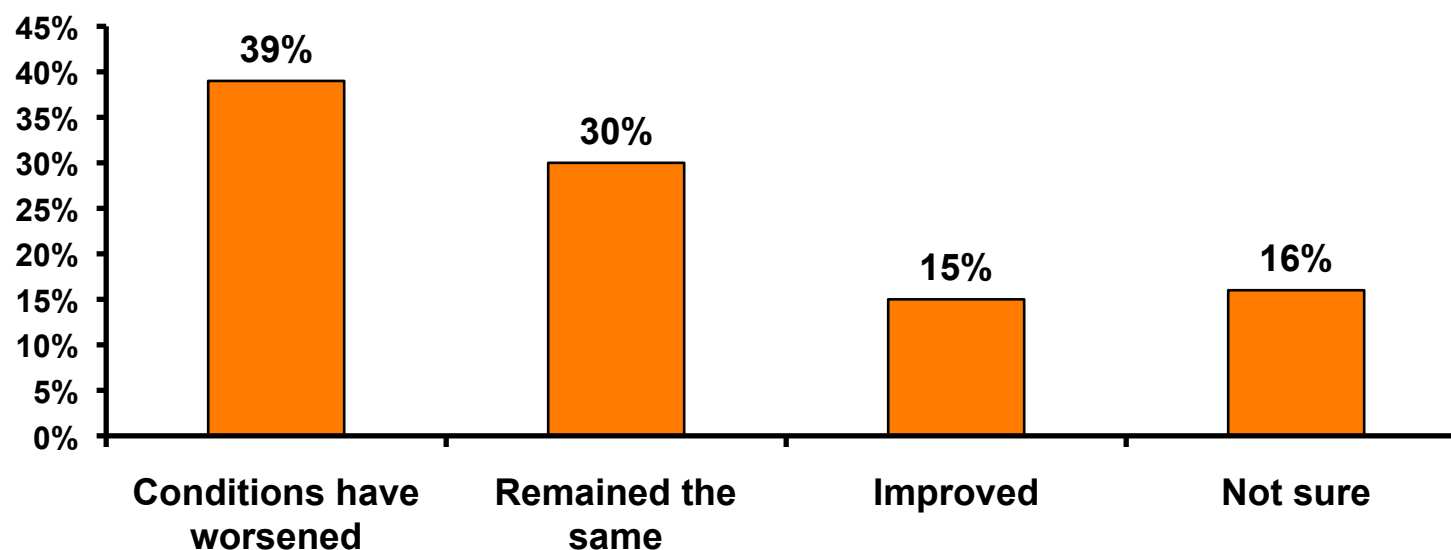
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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		3%	3%	1%	22%	5%	1%	5%	3%	
	Somewhat unimportant		33%	34%	44%	33%	19%	31%	44%	43%	33%
	Somewhat important	33%	48%	50%	43%	22%	71%	53%	42%	42%	67%
	Very important	67%	3%	4%	5%	22%		2%	2%	6%	
	Don't know		13%	9%	6%		5%	13%	6%	7%	
Total	Count	3	75	185	81	9	21	91	93	119	6

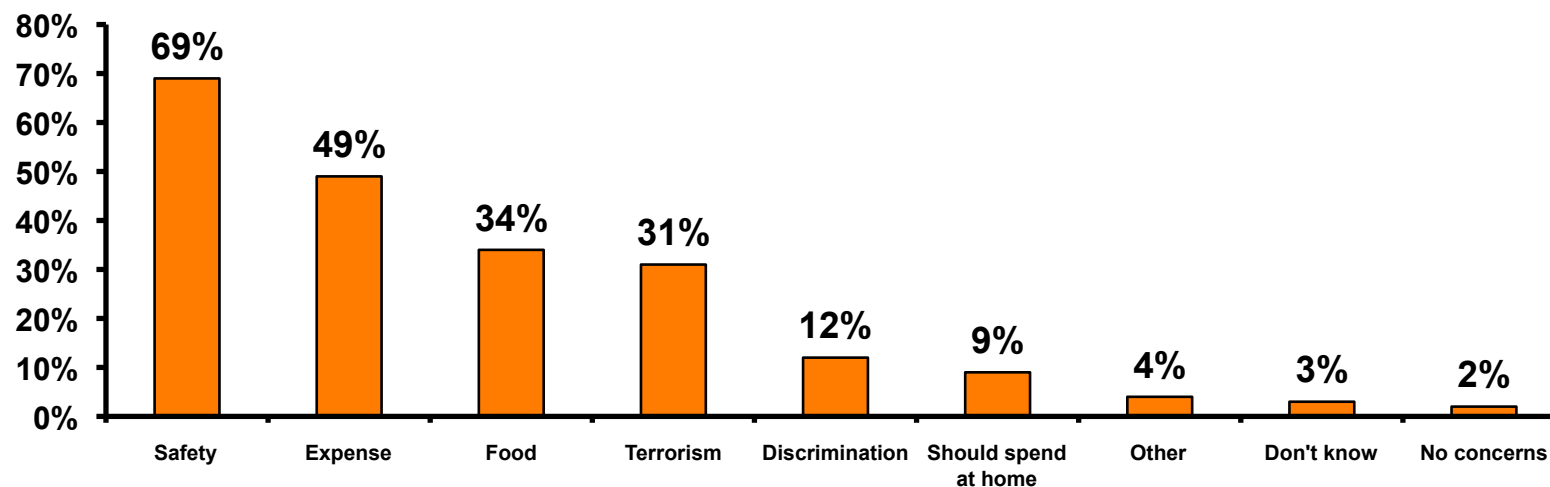
Rating Korean Economy Compared to 12 months ago



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	33%	41%	39%	36%	40%	33%	38%	45%	35%	67%
	Conditions have remained the same		26%	31%	33%	30%	14%	29%	28%	37%	33%
	Conditions have improved	33%	14%	14%	17%	20%	19%	12%	13%	18%	
	Do not know	33%	20%	16%	14%	10%	33%	21%	14%	9%	
Total	Count	3	74	185	81	10	21	91	93	119	6

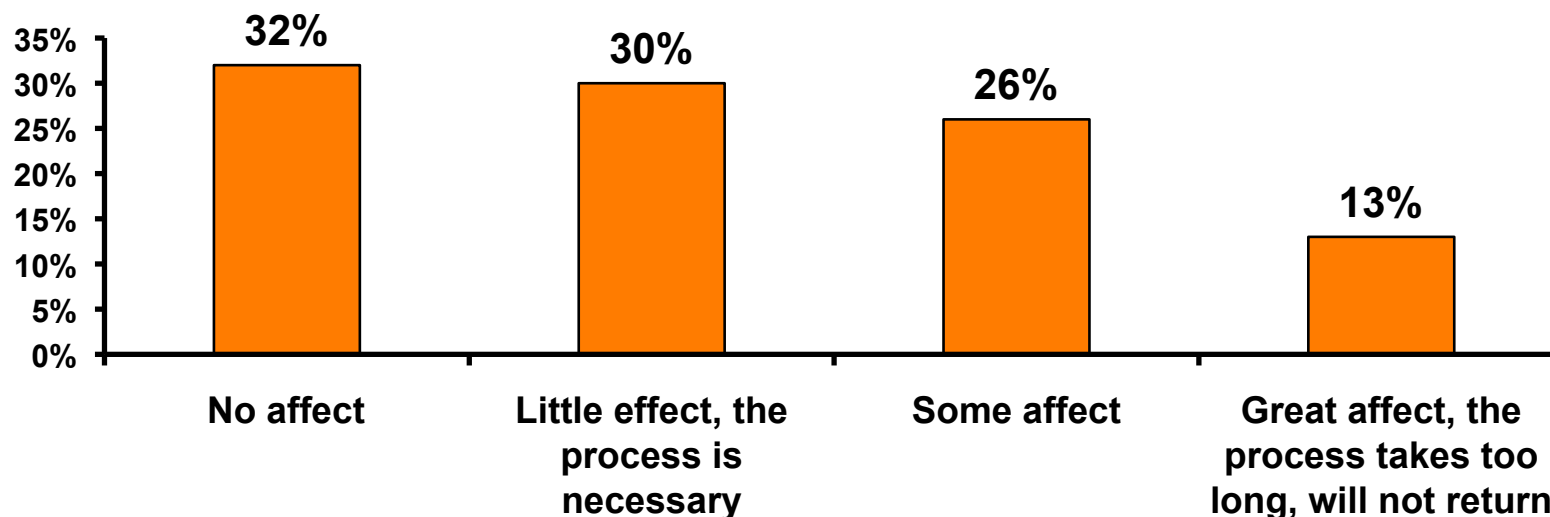
Concerns about travel outside of Korea - Overall



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	33%	63%	71%	70%	80%	67%	66%	67%	77%	67%
	Expense	67%	52%	51%	45%	30%	62%	46%	49%	51%	50%
	Food	33%	29%	38%	36%		19%	38%	38%	31%	33%
	Terrorism	33%	25%	34%	33%	10%	29%	30%	33%	30%	33%
	Spending money abroad when it should be spent at home	33%	11%	9%	5%	10%	19%	8%	7%	10%	
	Other	33%	3%	4%	3%	10%		5%	2%	4%	
	Do not know		8%	2%	1%	10%		5%	1%	2%	1.7%
	No concerns		3%	1%	4%			2%	3%	2%	
Total	Cases	3	75	184	80	10	21	91	91	119	6

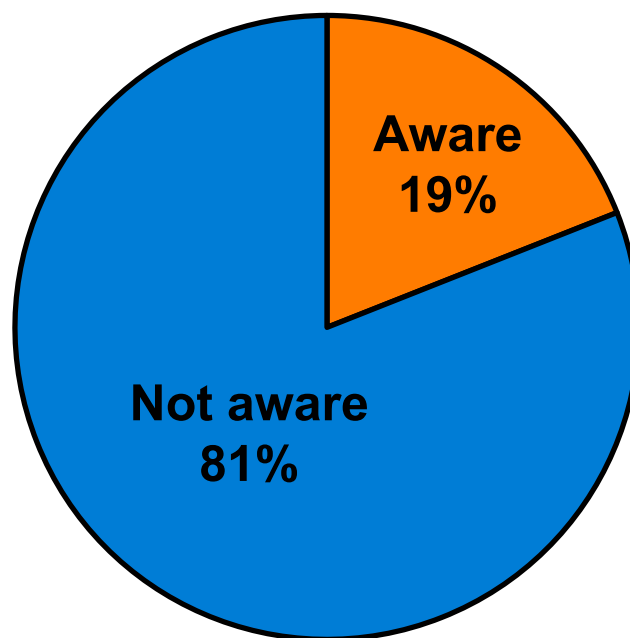
Security Screening/ Immigration Process at Guam International Airport



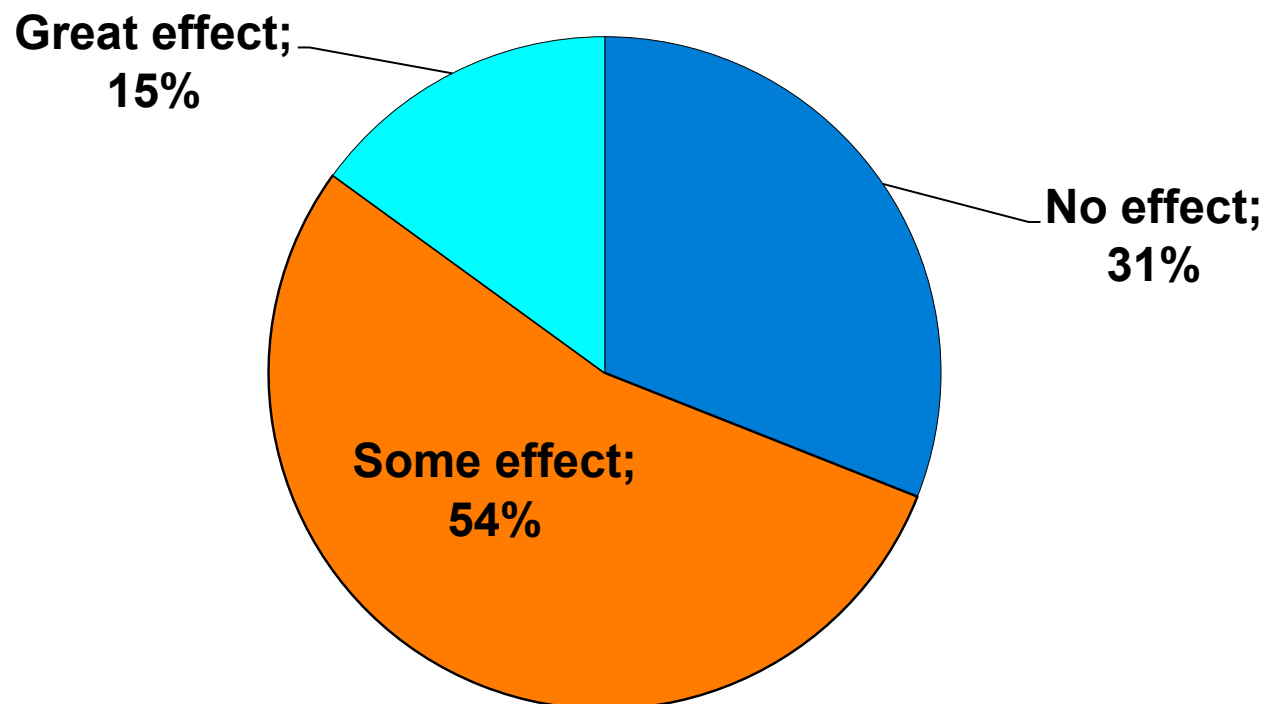
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.3** out of possible 7.0
- Agree (Score 6-7) – **15%**
- Neutral (Score 4-5) – **38%**
- Disagree (Score 1-3) – **48%**

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



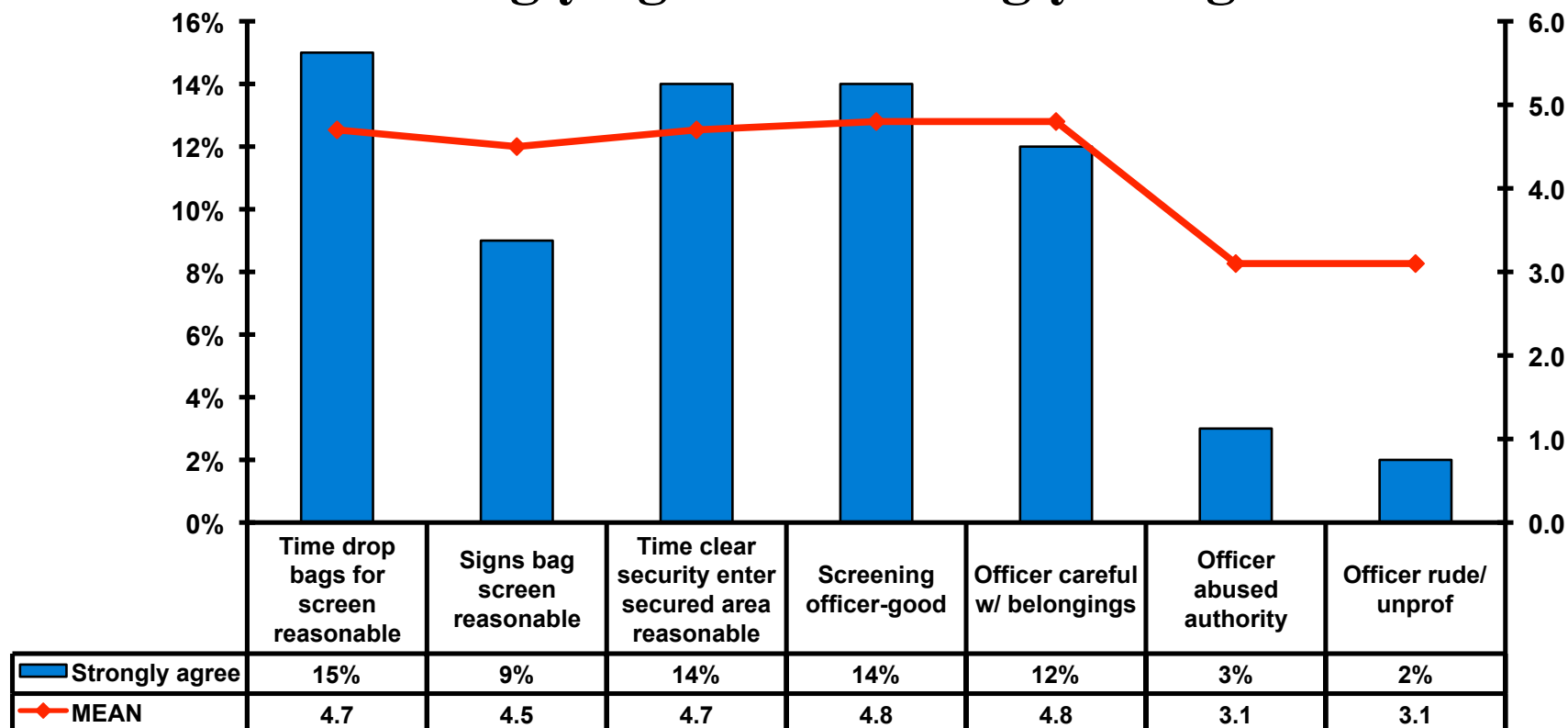
Effects of U.S. Military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

