



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

AUGUST 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

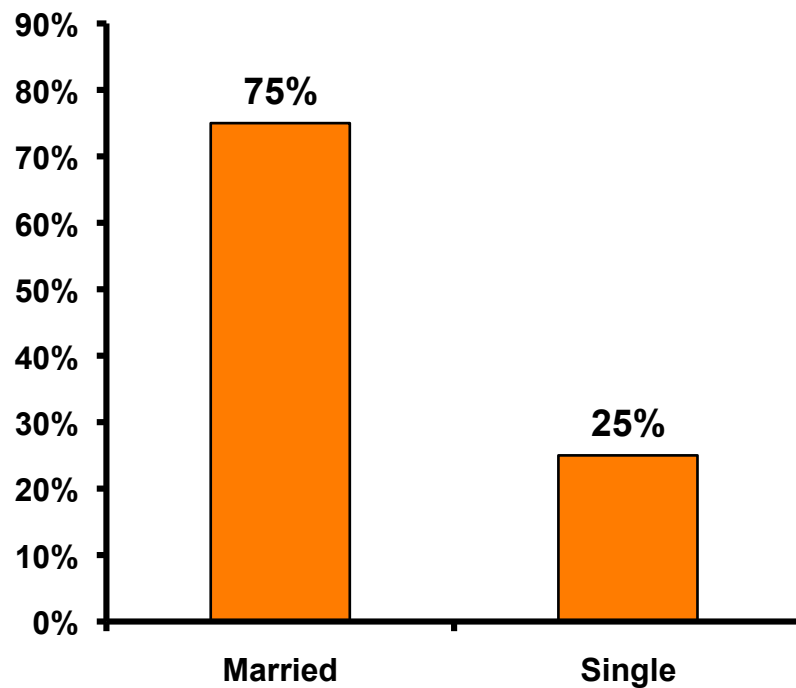
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing Korean 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 +/- 5.2 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.

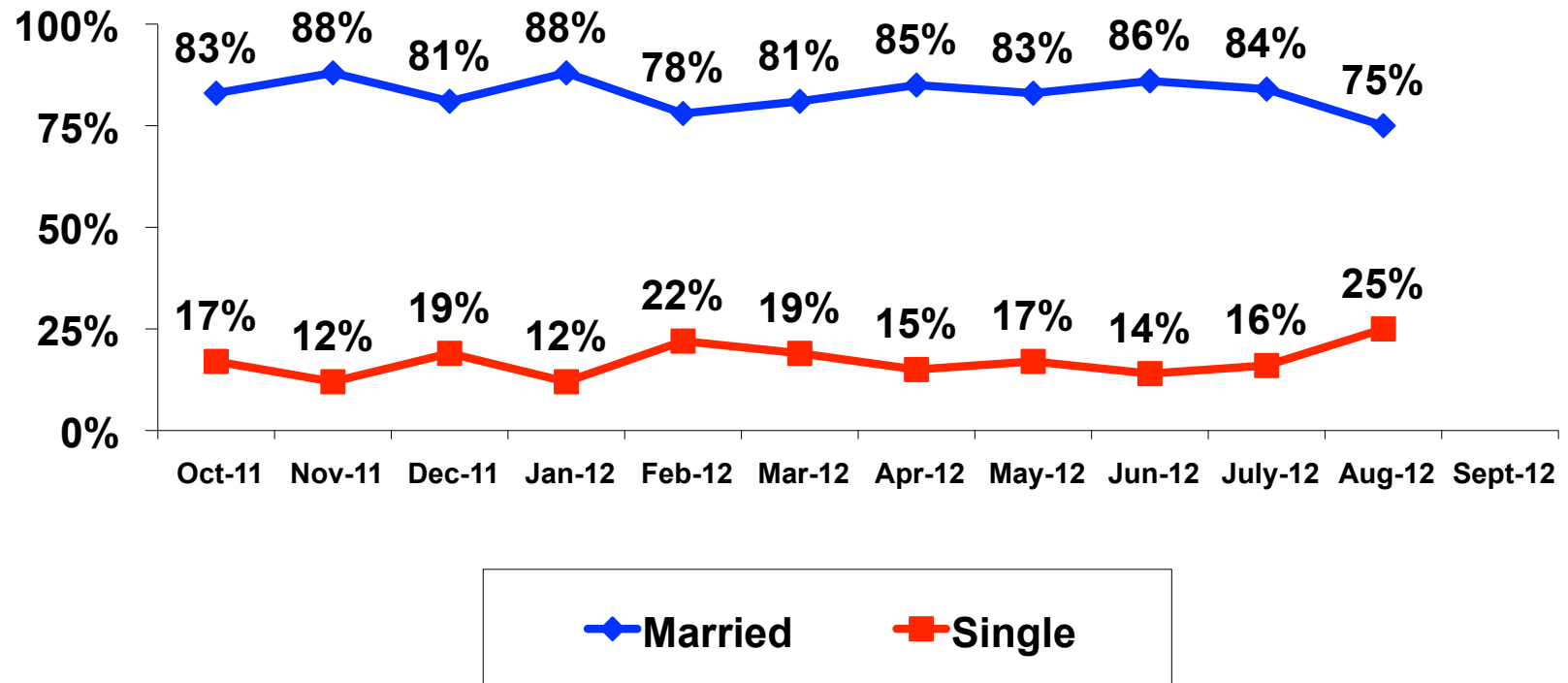
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

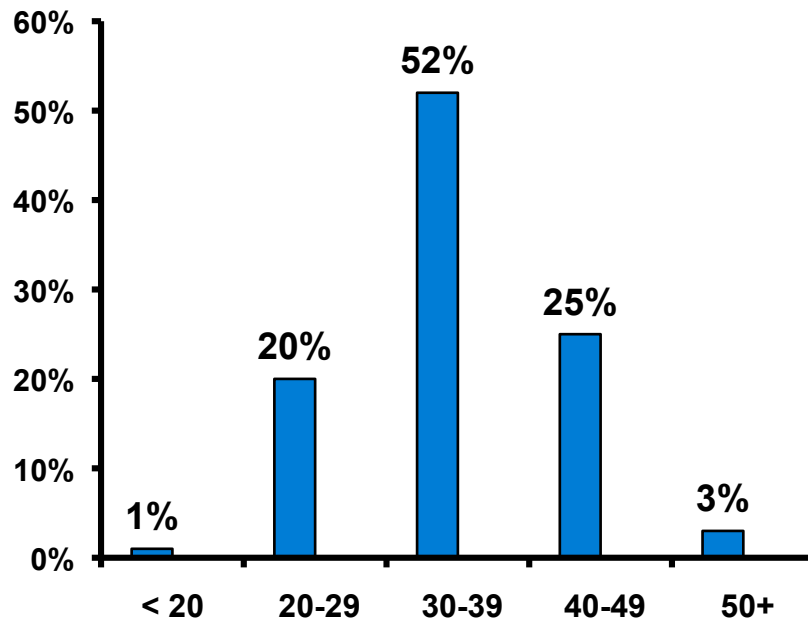


- A majority of visitors are married.

Marital Status

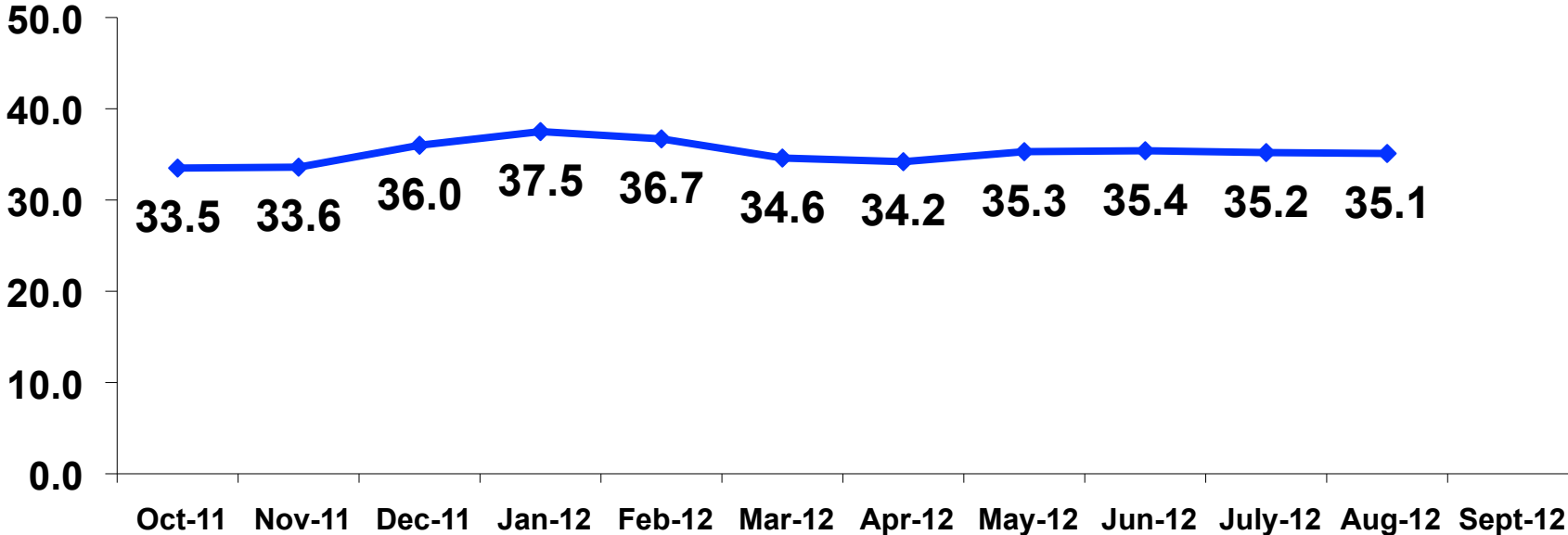


Age - Overall

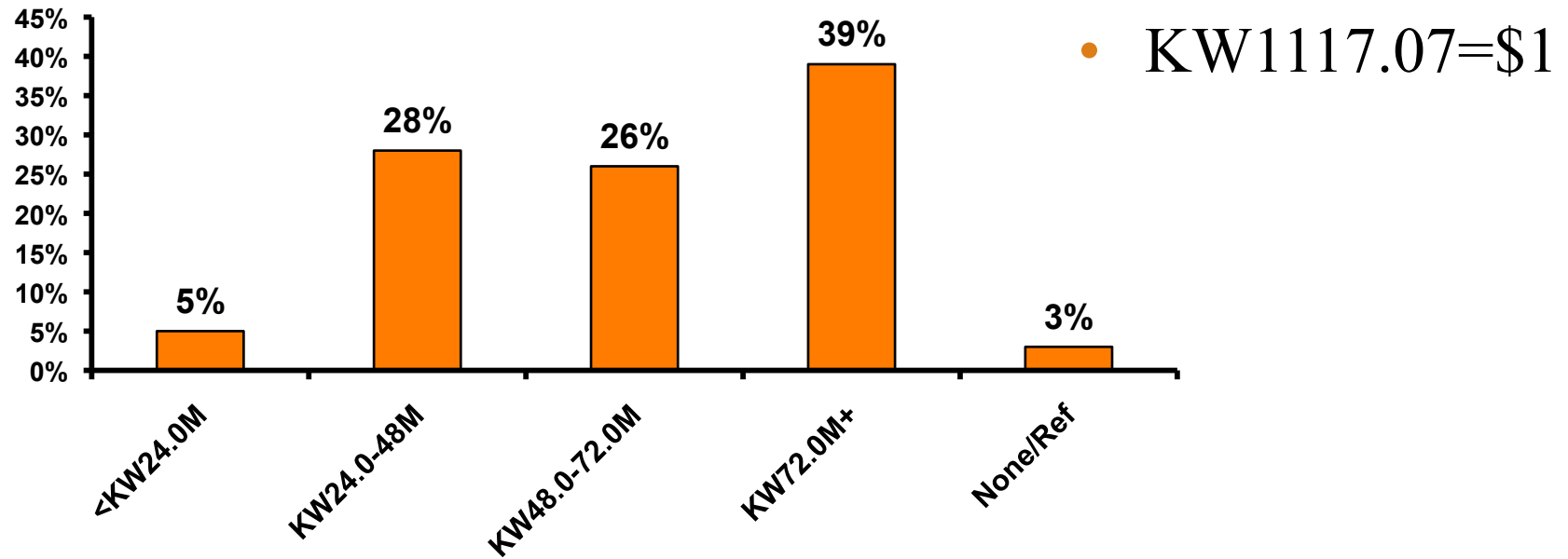


- The average age of the respondents is 35.1 years of age.

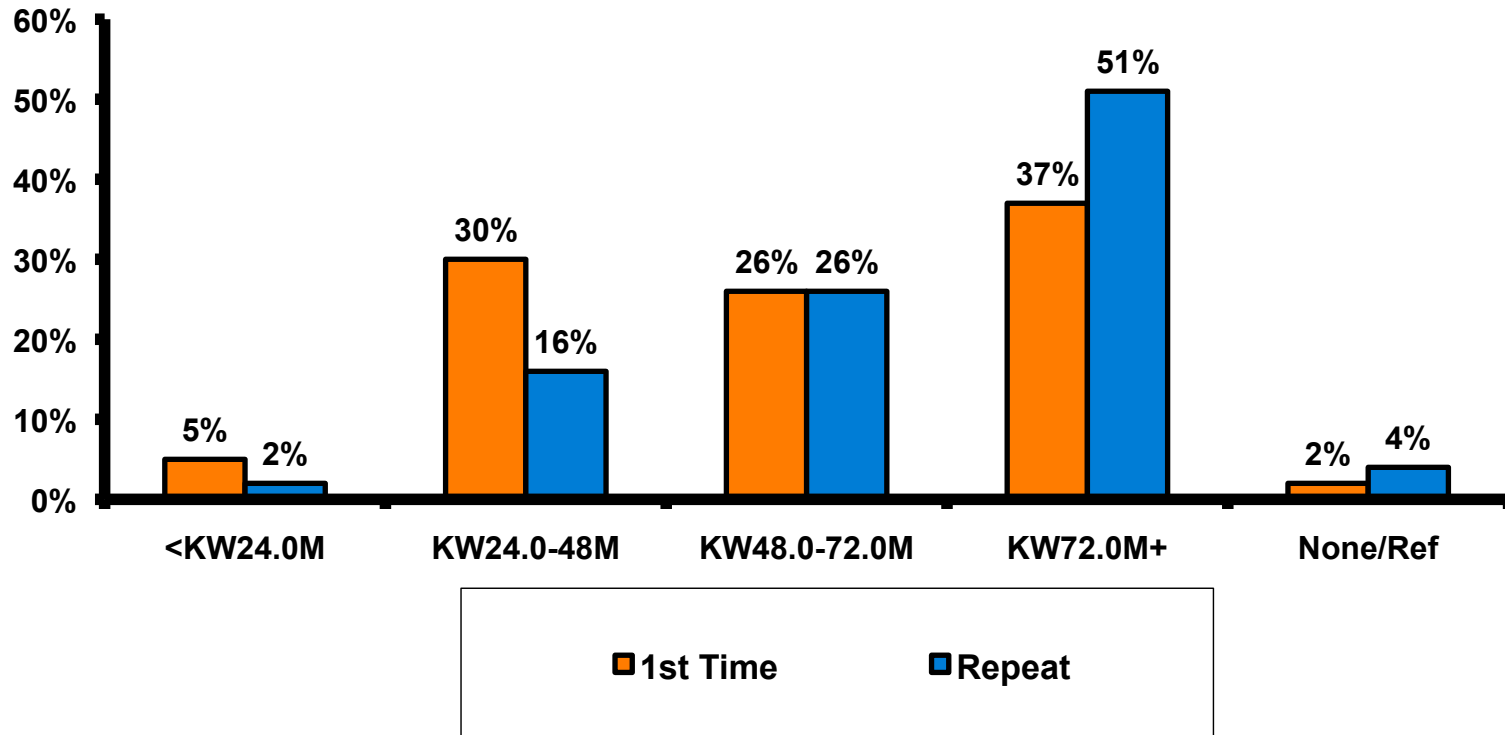
Average Age



Personal Income



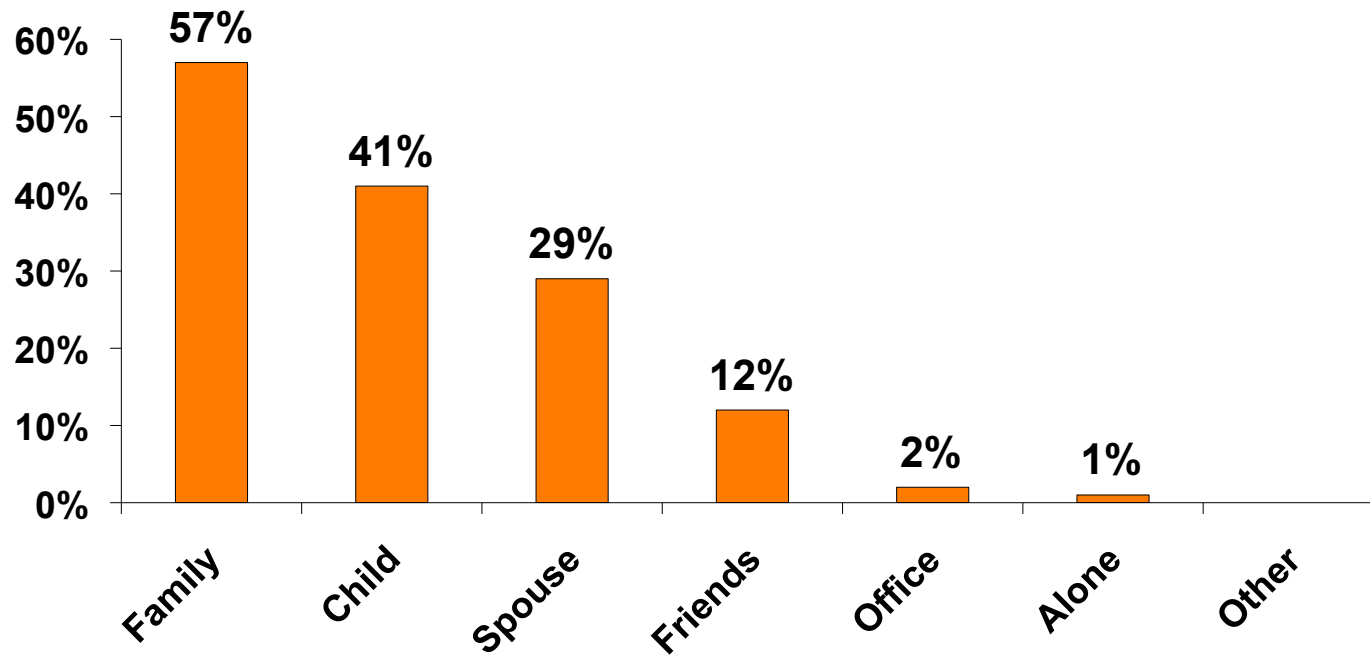
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

	TOTAL	GENDER		AGE					
		Male	Female	<20	20-29	30-39	40-49	50+	
PERSONAL INCOME <KW24.0M	Count	16	1	15		9	7		
		5%	1%	9%		13%	4%		
KW24.0M-KW48.0M	Count	94	37	57		24	55	14	1
		28%	22%	34%		35%	31%	18%	11%
KW48.0M-KW72.0M	Count	87	48	39		14	57	15	1
		26%	29%	23%		21%	32%	19%	11%
KW72.0M+	Count	131	75	56	2	20	54	49	6
		39%	45%	33%	67%	29%	31%	61%	67%
Refused	Count	9	6	3	1	1	4	2	1
		3%	4%	2%	33%	1%	2%	3%	11%
Total	Count	337	167	170	3	68	177	80	9

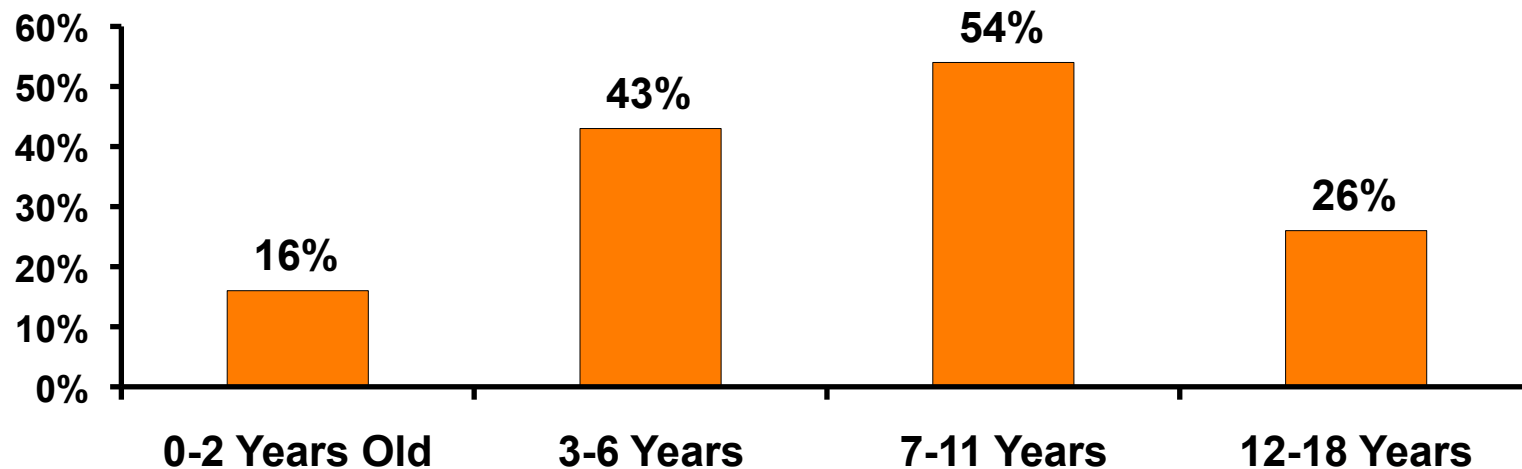
Travel Companions



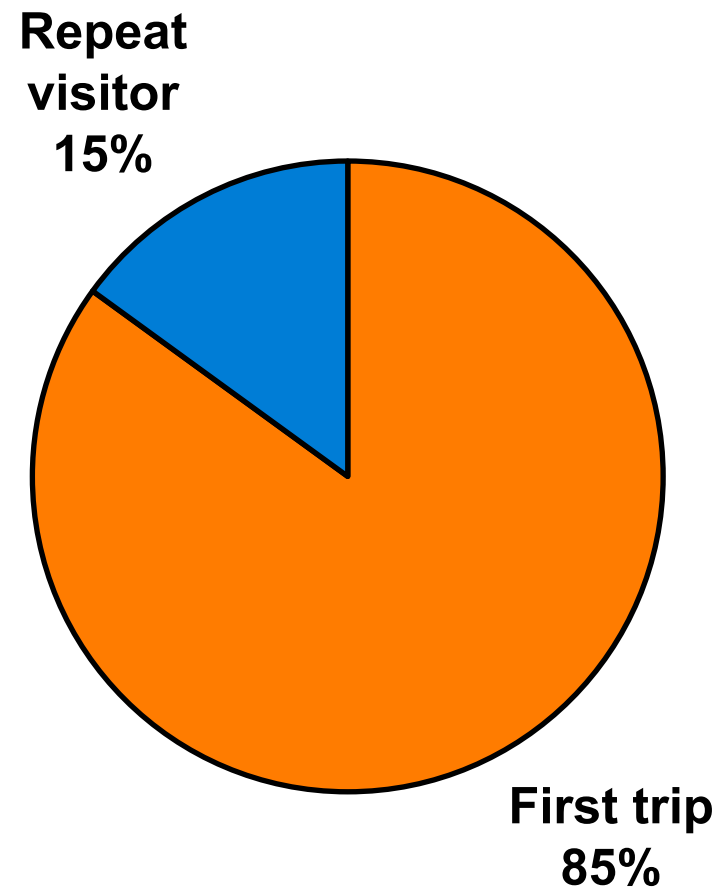
Number of Children Travel Party

N=144 total respondents traveling with children.

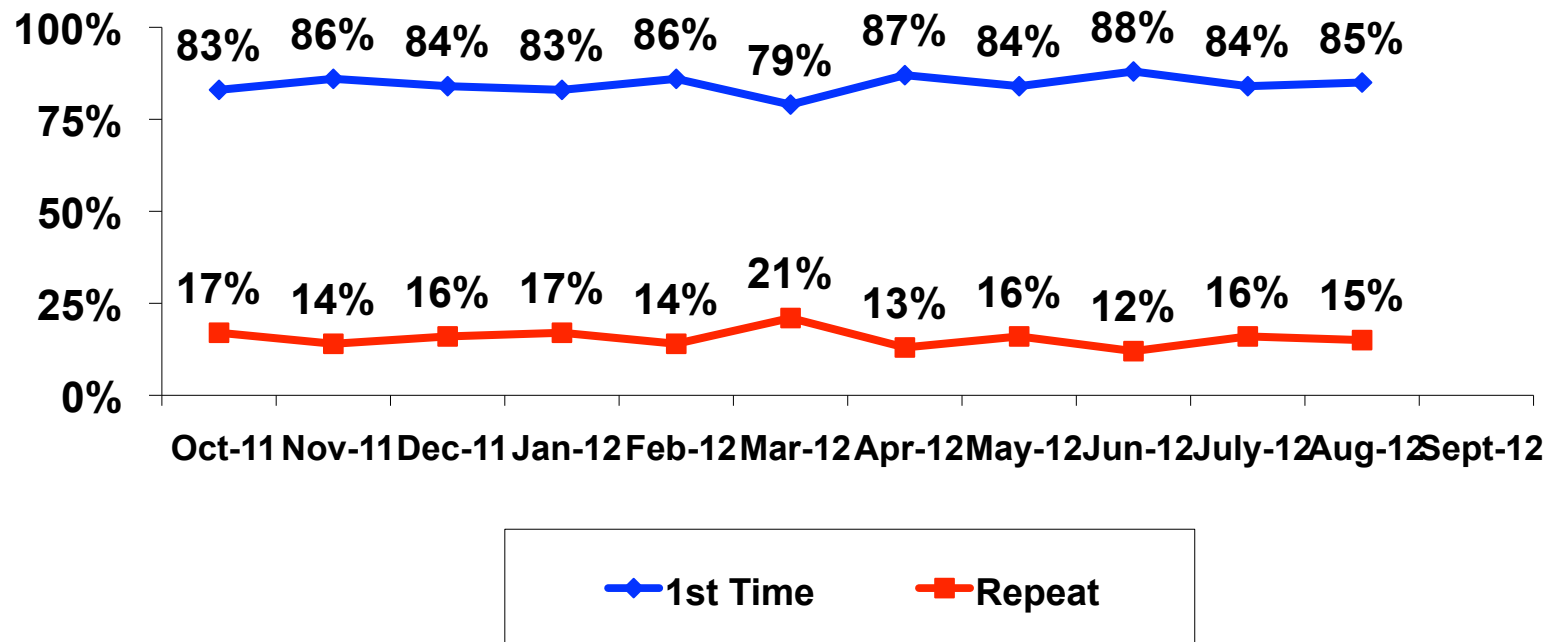
(Of those N=144 respondents, there is a total of 238 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



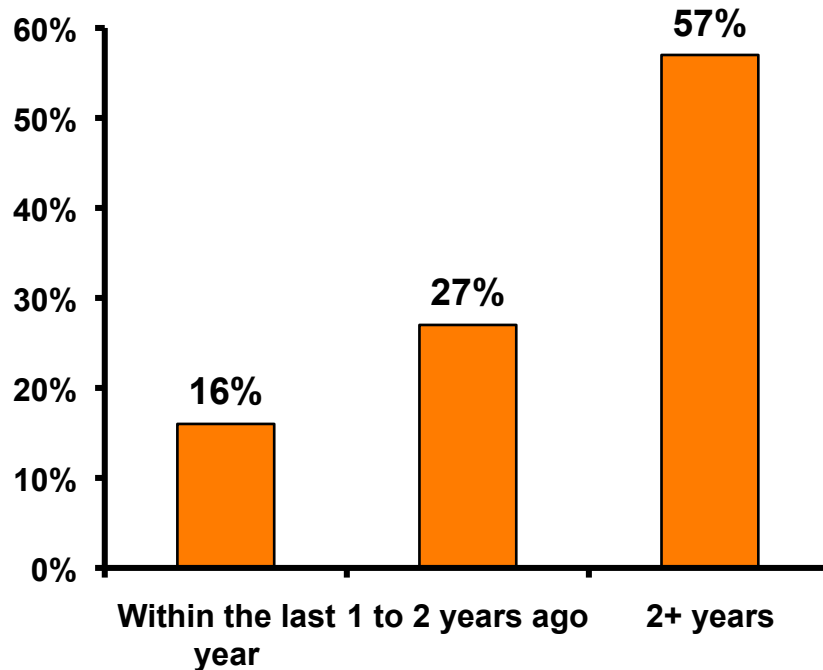
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	175	148	27
			50%	49%	53%
	Female	Count	176	151	24
			50%	51%	47%
Total		Count	351	299	51
AGE	<20	Count	4	4	
			1%	1%	
	20-29	Count	71	67	3
			20%	22%	6%
	30-39	Count	181	155	26
			52%	52%	51%
	40-49	Count	86	64	22
		25%	21%	43%	
	50+	Count	9	9	
			3%	3%	
Total		Count	351	299	51

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

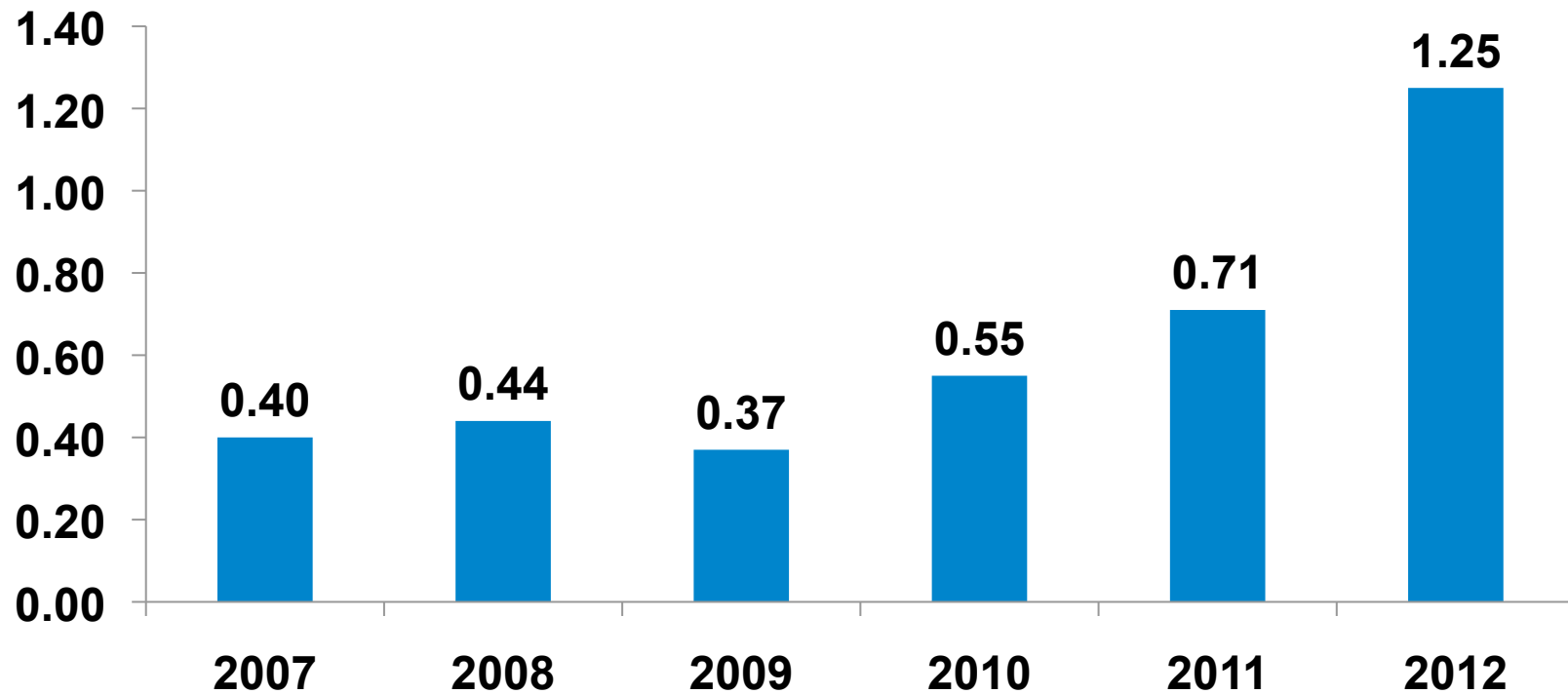
Repeat Visitors Last Trip

n = 49



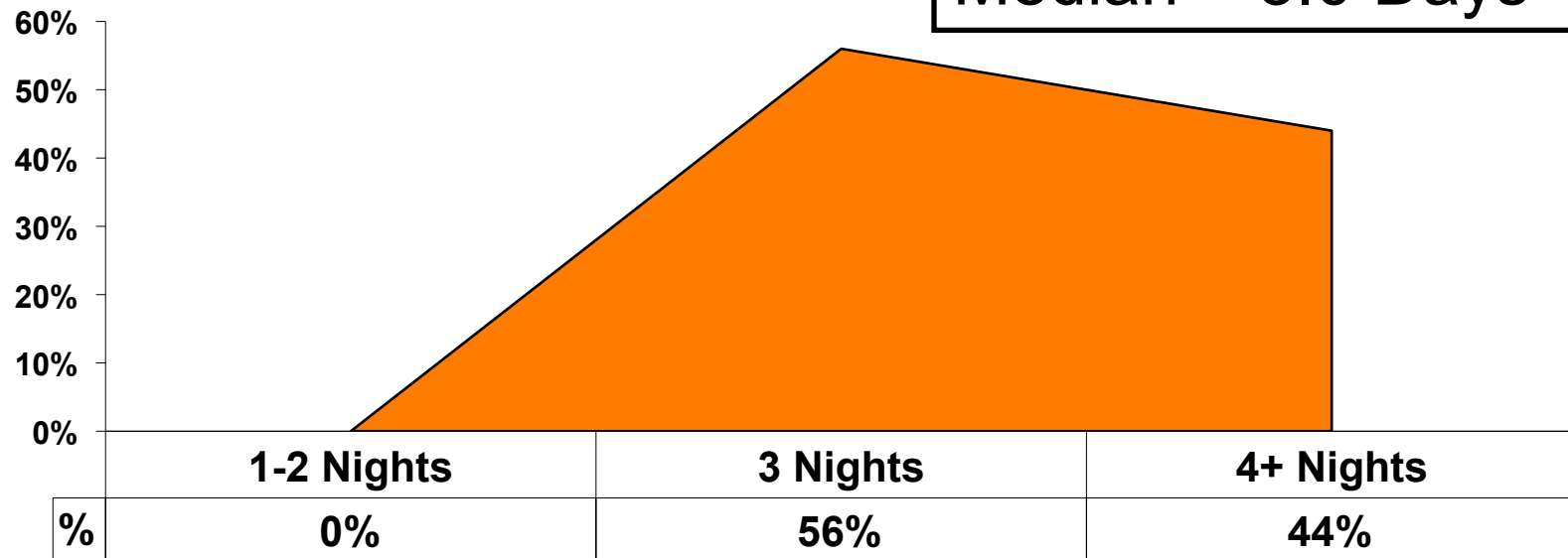
- The average repeat visitor has been to Guam 2.3 times.
- 43% of the repeat visitors have been to Guam within the last 2 years.

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

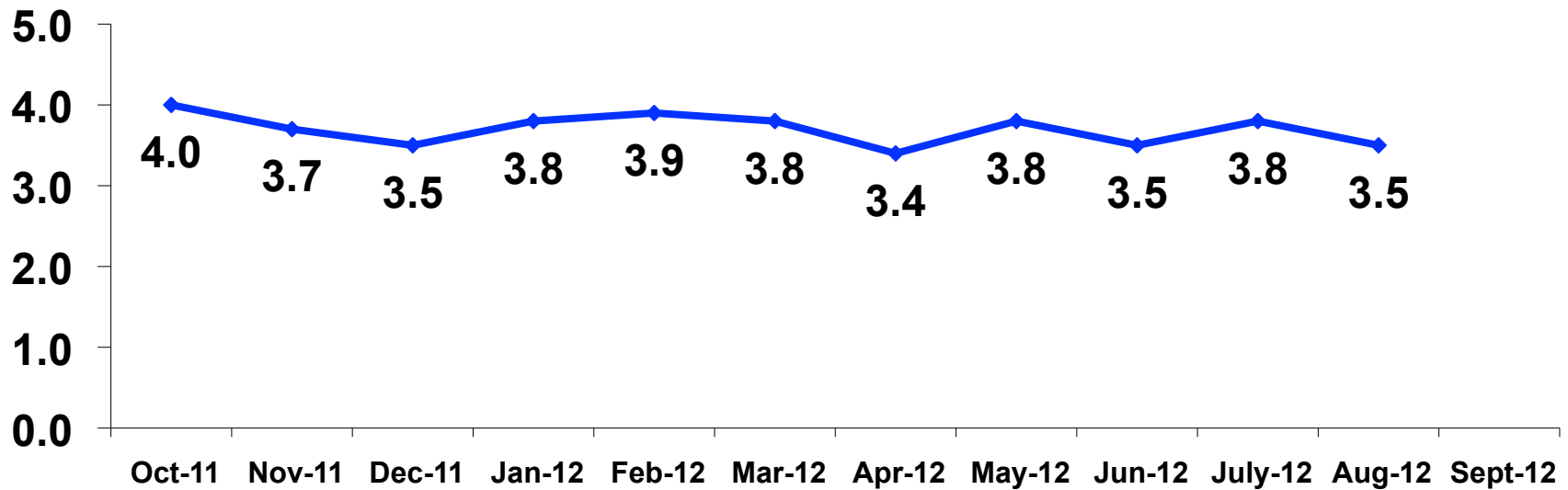


Length of Stay

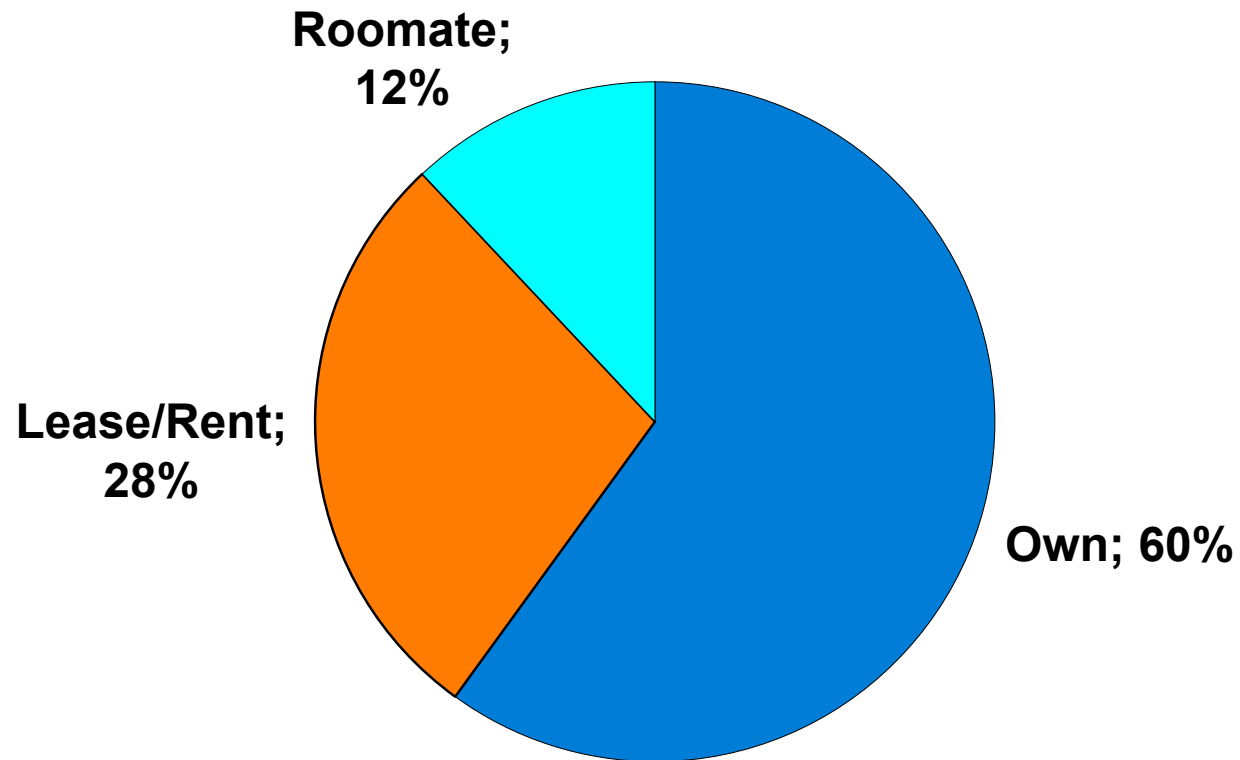
Mean = 3.50 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

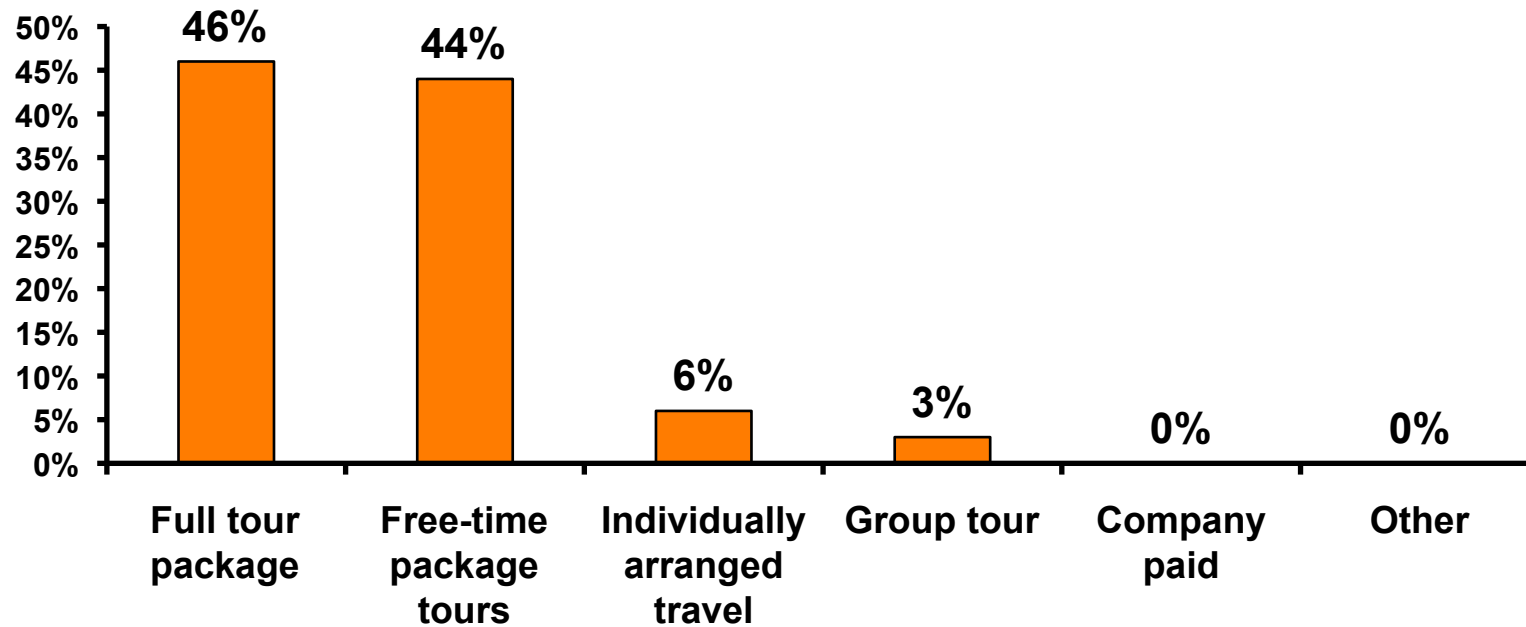


Occupation by Income

	TOTAL	PERSONAL INCOME				
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29 White Collar-Office	30%	25%	30%	34%	29%	
Prof/Specialist/Tech	15%	13%	13%	14%	20%	
Self-employed	15%	6%	11%	20%	15%	11%
Professor/Teacher	11%	19%	17%	9%	7%	11%
Homemaker	7%	6%	6%	8%	5%	11%
Student	5%	19%	2%		5%	22%
Skilled worker	3%		4%	3%	4%	
Manager	3%		1%	2%	6%	
Service worker	3%		7%	1%	1%	
Sales/Clerical	2%		1%	5%	2%	
Other	2%	6%	1%	2%	2%	11%
Govt - Office/non-mgr	1%		2%		2%	
Unemployed	1%	6%			1%	33%
Govt-Mgr	1%		2%		2%	
Free-lancer	1%		1%	1%		
Retired	0%		1%			
Govt-Exec	0%					
Total Count	349	16	94	87	130	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

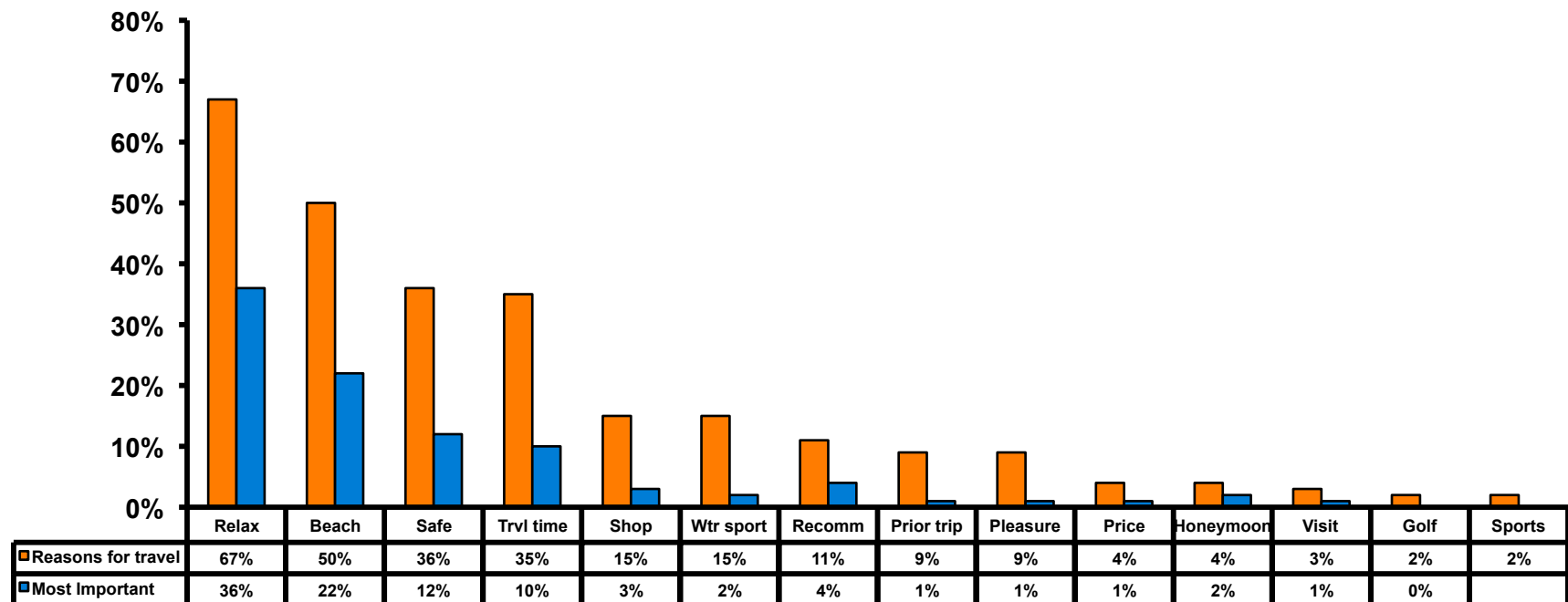


Accommodation by Income

Average length of stay: 3.50 days

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.9	Pacific Islands Club PIC	40%	25%	31%	39%	50%	22%
	Hyatt Regency Guam	12%	13%	10%	13%	15%	11%
	Hotel Nikko Guam	8%	6%	14%	10%	3%	
	Sheraton Laguna Resort	8%	19%	10%	7%	5%	22%
	Hilton Guam Resort & Spa	7%	13%	6%	6%	8%	11%
	Holiday Resort Guam	7%	13%	9%	5%	5%	11%
	Outrigger Guam Resort	6%	13%	7%	8%	3%	11%
	The Westin Resort Guam	4%		3%	6%	4%	
	Onward Beach Resort	3%		3%	2%	3%	
	Relatives, Friends, Home Stay	1%		2%	1%	1%	
	Leo Palace Resort	1%		1%	1%	1%	
	Guam Reef Hotel	1%		1%		1%	11%
	Bayview Hotel	1%		1%		1%	
	Hotel Sane Fe	1%		1%			
	Guam Marriott Resort Hotel	0%				1%	
	Guam Aurora Resort Villa & Spa	0%			1%		
	Pacific Bay Hotel	0%				1%	
	Royal Orchid Guam	0%			1%		
	Fiesta Resort Guam	0%		1%			
Total	Count	351	16	94	87	131	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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%	50%	68%	69%	63%	78%	62%	72%	
Beautiful seas, beaches, tropical climate	50%	75%	54%	56%	35%	44%	46%	55%	
It is a safe place to spend a vacation	36%	25%	28%	38%	41%	22%	34%	38%	
Short travel time	35%		34%	38%	30%	56%	27%	43%	
Recommendation of friend, relative, travel agency	15%	25%	17%	16%	12%	22%	16%	15%	
Shopping	15%		20%	15%	13%	22%	13%	18%	
Water sports	11%		14%	10%	13%	11%	10%	13%	
A previous visit	9%		3%	10%	15%		11%	7%	
Pleasure	9%	25%	11%	9%	8%		5%	13%	
Price of the tour package	4%		7%	3%	1%	11%	3%	5%	
Honeymoon	4%		10%	3%	1%		6%	1%	
To visit friends or relatives	3%			3%	7%		4%	2%	
To golf	2%			3%	2%		2%	2%	
Organized Sporting Activity	2%			3%	1%	11%	3%	1%	
My company sponsored me	2%			1%	5%	11%	3%		
SCUBA diving	1%			1%	2%	11%	2%	1%	
Other	1%			1%	2%		1%	1%	
Company or Business trip	1%				2%		1%		
Promotional materials from GVB	1%			1%			1%	1%	
Career certification or testing	0%		1%				1%		
To get married or Attend wedding	0%			1%			1%		
Special Interest Tour	0%			1%			1%		
Total	Cases	351	4	71	181	86	9	175	176

Motivation by Income

	TOTAL	PERSONAL INCOME					Refused
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+		
Q.5 Just to relax	67%	69%	68%	68%	70%	44%	
Beautiful seas, beaches, tropical climate	50%	69%	50%	52%	51%	22%	
It is a safe place to spend a vacation	36%	38%	34%	33%	40%	44%	
Short travel time	35%	50%	29%	41%	34%	44%	
Shopping	15%	31%	17%	13%	16%	11%	
Recommendation of friend, relative, travel agency	15%	25%	15%	16%	11%	22%	
Water sports	11%	6%	13%	11%	11%	11%	
A previous visit	9%	6%	9%	10%	9%	11%	
Pleasure	9%		14%	7%	9%		
Price of the tour package	4%		6%	2%	4%		
Honeymoon	4%	6%	7%	5%			
To visit friends or relatives	3%		4%	2%	3%		
To golf	2%	6%	1%	2%	3%		
Organized Sporting Activity	2%	6%	1%		3%	11%	
My company sponsored me	2%		1%	1%	3%		
SCUBA diving	1%		1%	2%	2%		
Other	1%		1%	1%	2%		
Company or Business trip	1%			1%	1%		
Promotional materials from GVB	1%				2%		
Career certification or testing	0%				1%		
To get married or Attend wedding	0%		1%				
Special Interest Tour	0%				1%		
Total Cases	351	16	94	87	131	9	

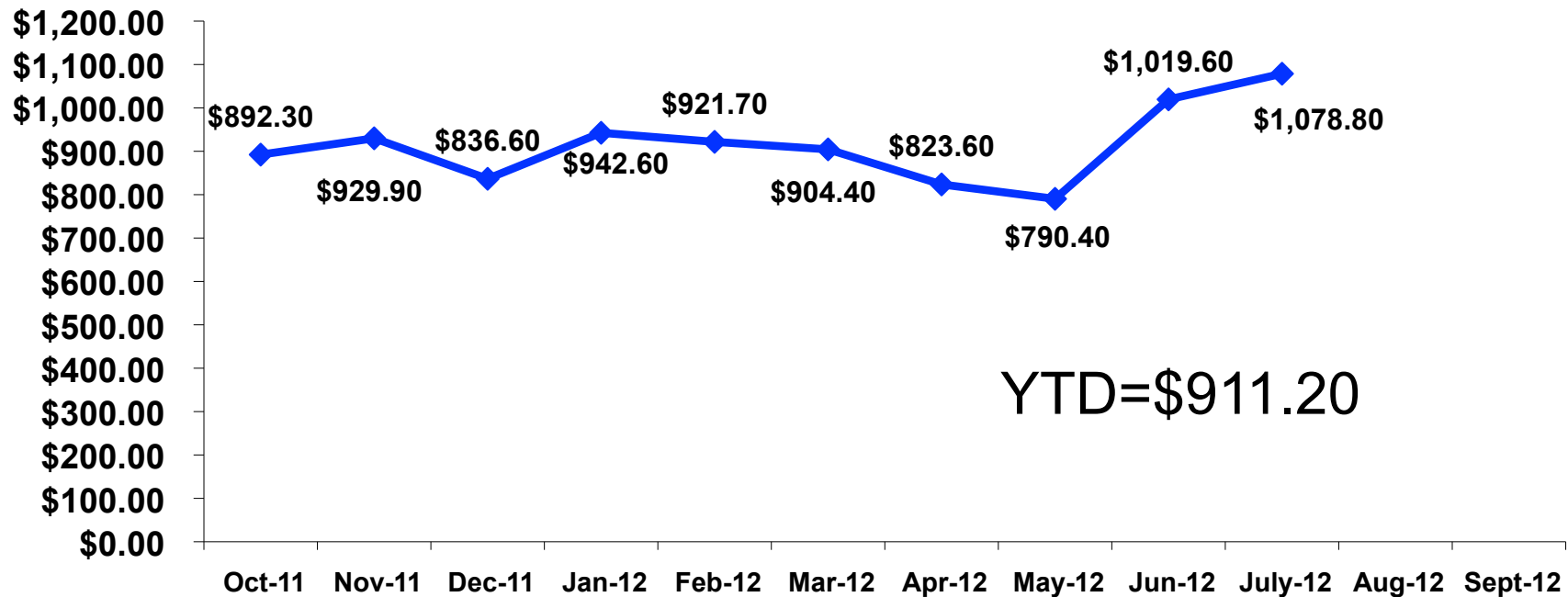
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1117.07/US\$1

- \$3,160.20 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$21,037 = maximum (highest amount recorded for the entire sample)
- \$1,078.80 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

KW1117.07=\$1

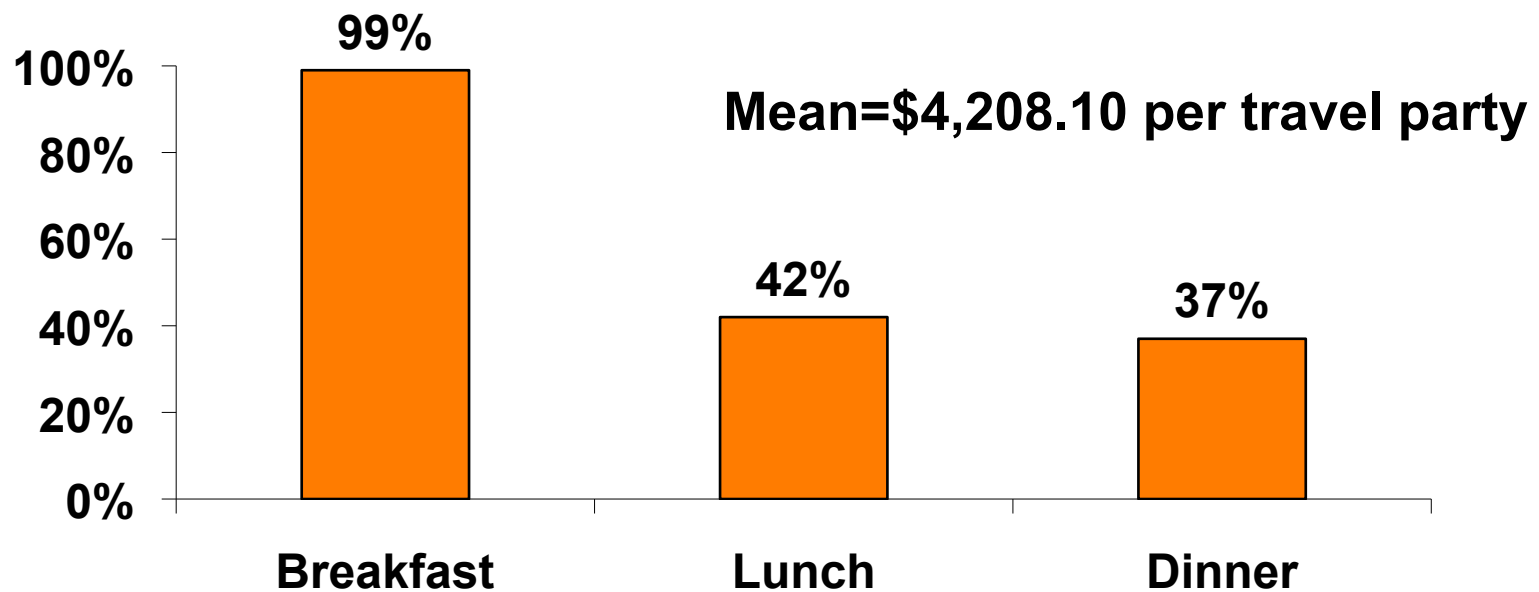
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,913.00
Air & Accommodation w/ daily meal package	\$4,208.10
Air only	\$1,853.10
Accommodation only	\$-
Accommodation w/ daily meal only	\$1,850.10
Food & Beverages in Hotel	\$71.60
Ground transportation- Korea	\$12.50
Ground transportation- Guam	\$185.80
Optional tours/ activities	\$595.30
Other expenses	\$648.40
Total Prepaid	\$3,160.20

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

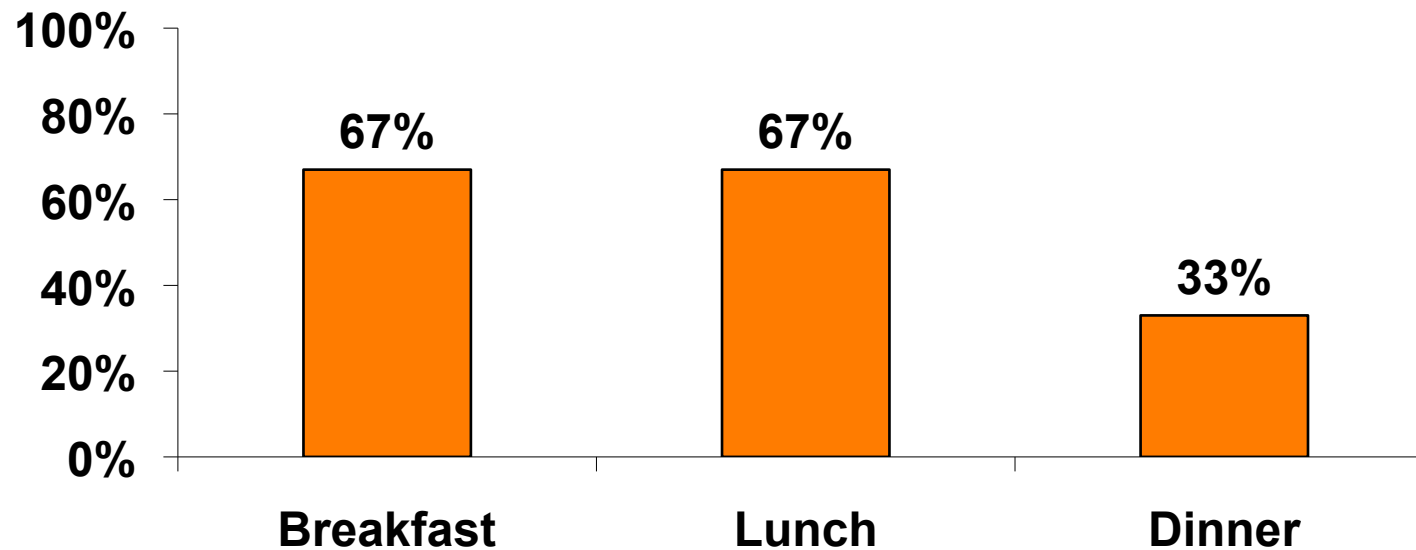
n=208



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

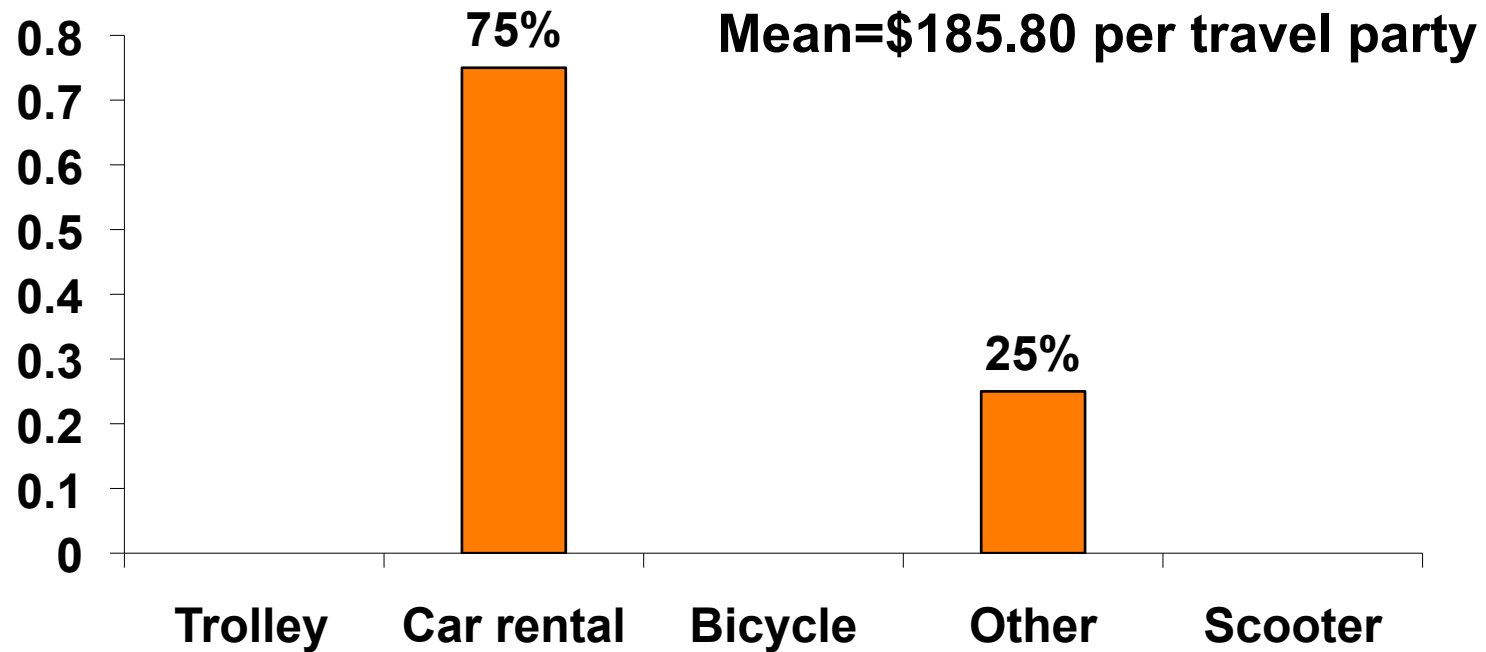
n= 3



Mean= \$1,850.10 per travel party

Prepaid Ground Transportation

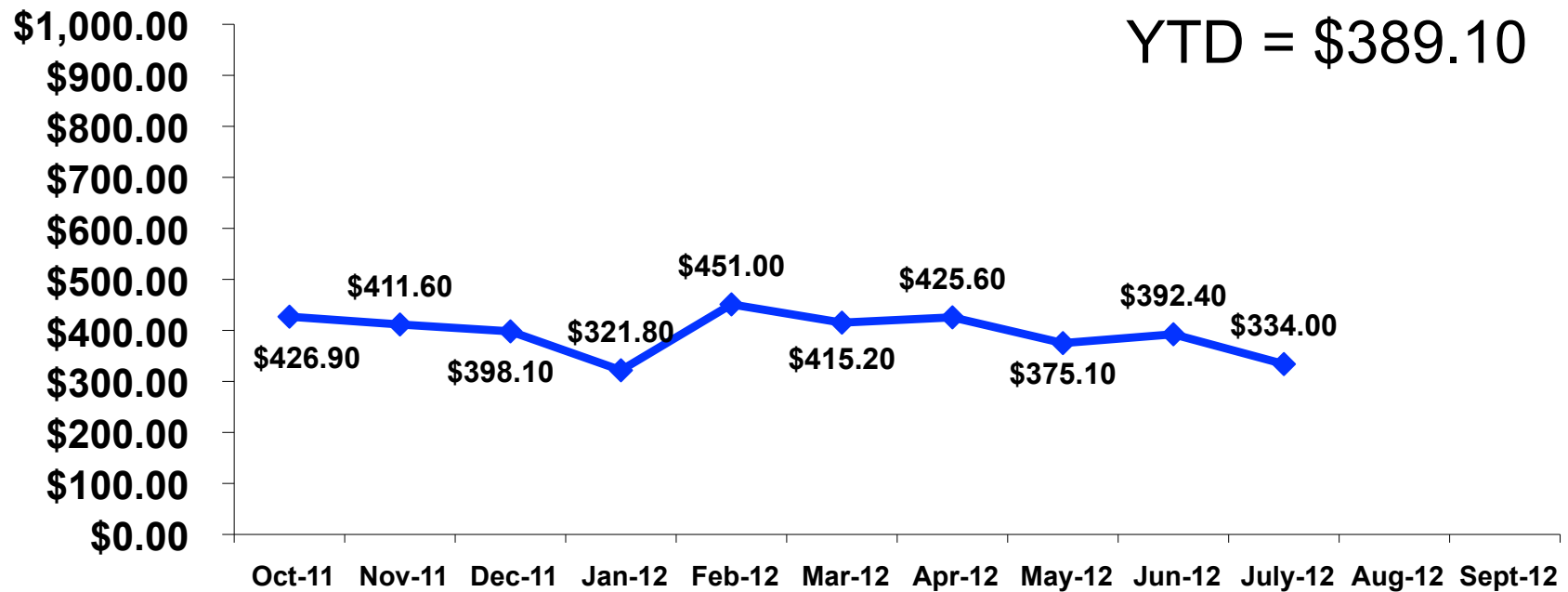
N=4



On-Island Expenditures

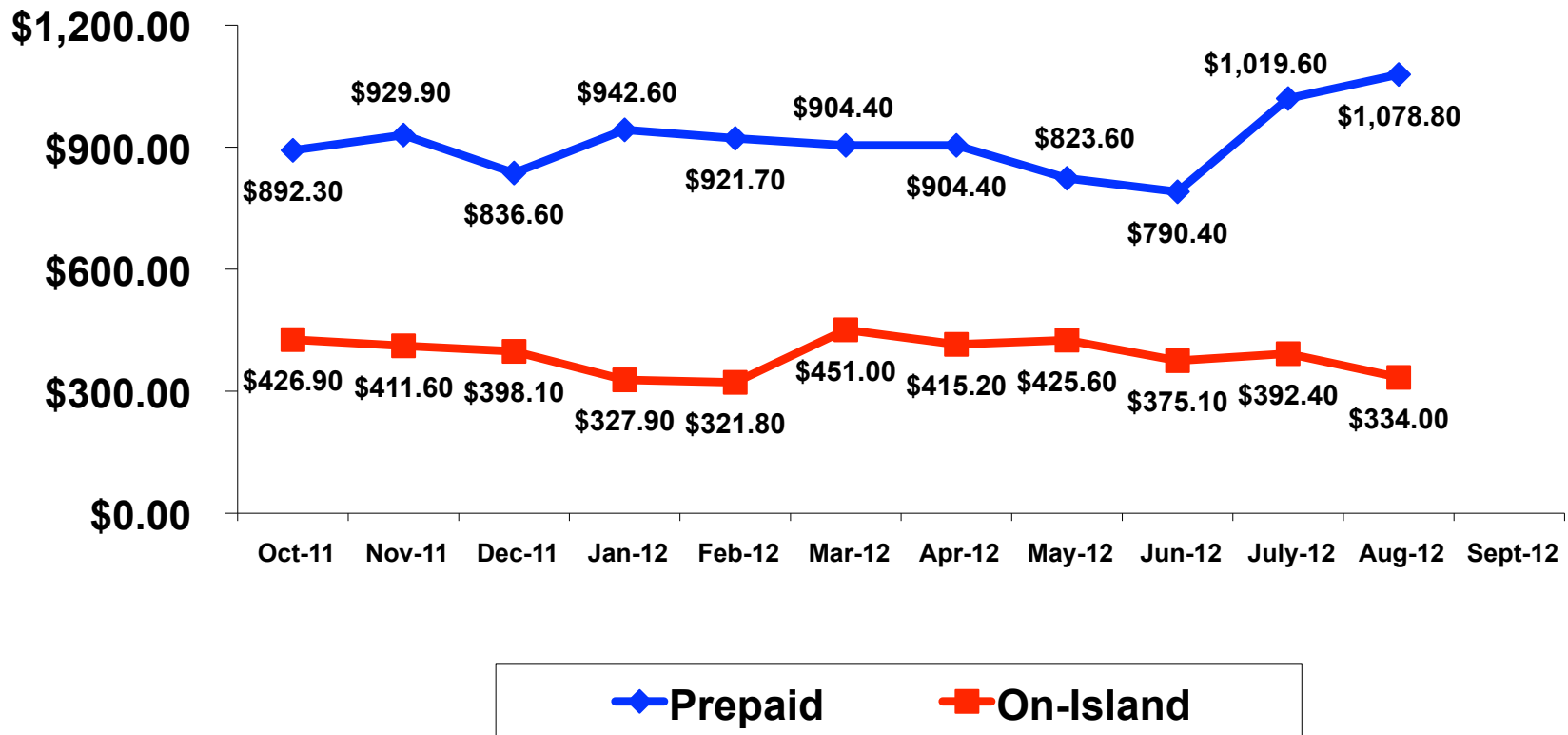
- \$889.70 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,700 = Maximum (highest amount recorded for the entire sample)
- \$334.00 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

On-Island YTD = \$389.10 Prepaid YTD=\$911.20



Total On-Island Expenditure by Gender & Age

	TOTAL	GENDER		GENDER									
		Male	Female	Male					Female				
				AGE									
				<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A Mean	\$889.66	\$896.01	\$883.34	\$386.67	\$1,034.57	\$987.77	\$791.57	\$493.75	\$0.00	\$912.17	\$709.57	\$1,423.07	\$2,300.00
Median	\$695	\$700	\$613	\$200	\$700	\$730	\$725	\$225	\$0	\$600	\$565	\$900	\$2,300

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$67.89	\$61.21	\$74.54	\$12.50	\$47.72	\$63.71	\$100.72	\$22.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$27.91	\$30.19	\$25.64	\$10.00	\$28.31	\$22.09	\$42.42	\$11.11
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$72.93	\$74.33	\$71.53	\$67.50	\$91.41	\$78.83	\$43.84	\$88.89
	Median	\$0	\$0	\$0	\$35	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$143.01	\$112.94	\$173.08	\$100.00	\$139.14	\$151.80	\$144.77	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$171.90	\$194.23	\$149.70	\$50.00	\$150.32	\$172.45	\$209.90	\$22.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/SOUV- F&F AT HOME	Mean	\$82.48	\$90.64	\$74.36	\$0.00	\$84.15	\$87.46	\$80.73	\$22.22
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$40.17	\$37.03	\$43.28	\$0.00	\$61.65	\$38.55	\$28.99	\$27.78
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$305.50	\$295.63	\$315.30	\$50.00	\$364.74	\$258.62	\$348.14	\$500.00
	Median	\$10	\$10	\$10	\$0	\$10	\$10	\$80	\$0
TOTAL ON ISLAND	Mean	\$889.66	\$896.01	\$883.34	\$290.00	\$951.82	\$837.14	\$997.17	\$694.44
	Median	\$695	\$700	\$613	\$180	\$625	\$700	\$750	\$250

On-Island Expenditures

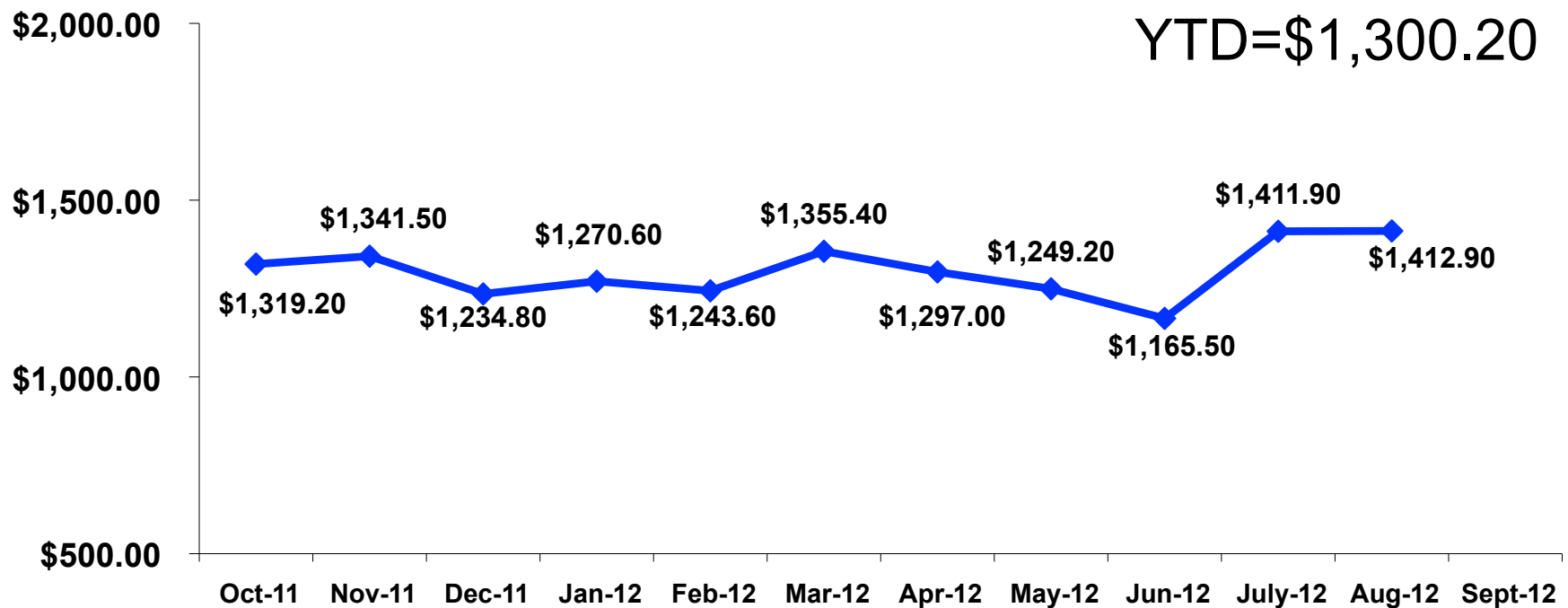
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$51.01	\$168.20
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$27.88	\$27.45
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$76.48	\$53.53
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$145.68	\$127.84
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$159.12	\$249.80
	Median	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$85.84	\$64.37
	Median	\$0	\$0
LOCAL TRANS	Mean	\$41.96	\$29.04
	Median	\$0	\$0
OTHER EXP	Mean	\$303.30	\$251.12
	Median	\$15	\$0
TOTAL ON ISLAND	Mean	\$865.33	\$971.29
	Median	\$695	\$660

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,412.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,628 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

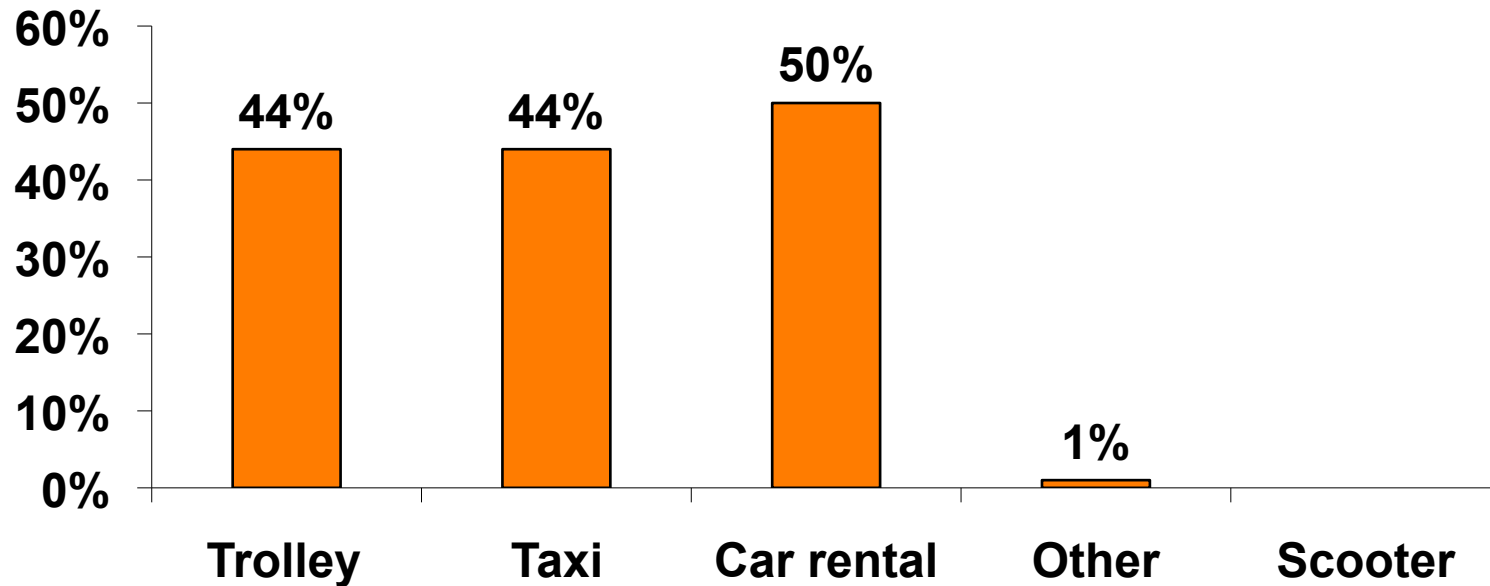


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$67.90
Food & beverage in fast food restaurant/ convenience store	\$27.90
Food & beverage at restaurants or drinking establishments outside a hotel	\$72.90
Optional tours and activities	\$143.00
Gifts/ souvenirs for yourself/companions	\$171.90
Gifts/ souvenirs for friends/family at home	\$82.50
Local transportation	\$40.20
Other expenses not covered	\$305.50
Average Total	\$889.70

Local Transportation

n=117



Mean=\$40.20 per travel party

Guam Airport Expenditures

- \$40.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

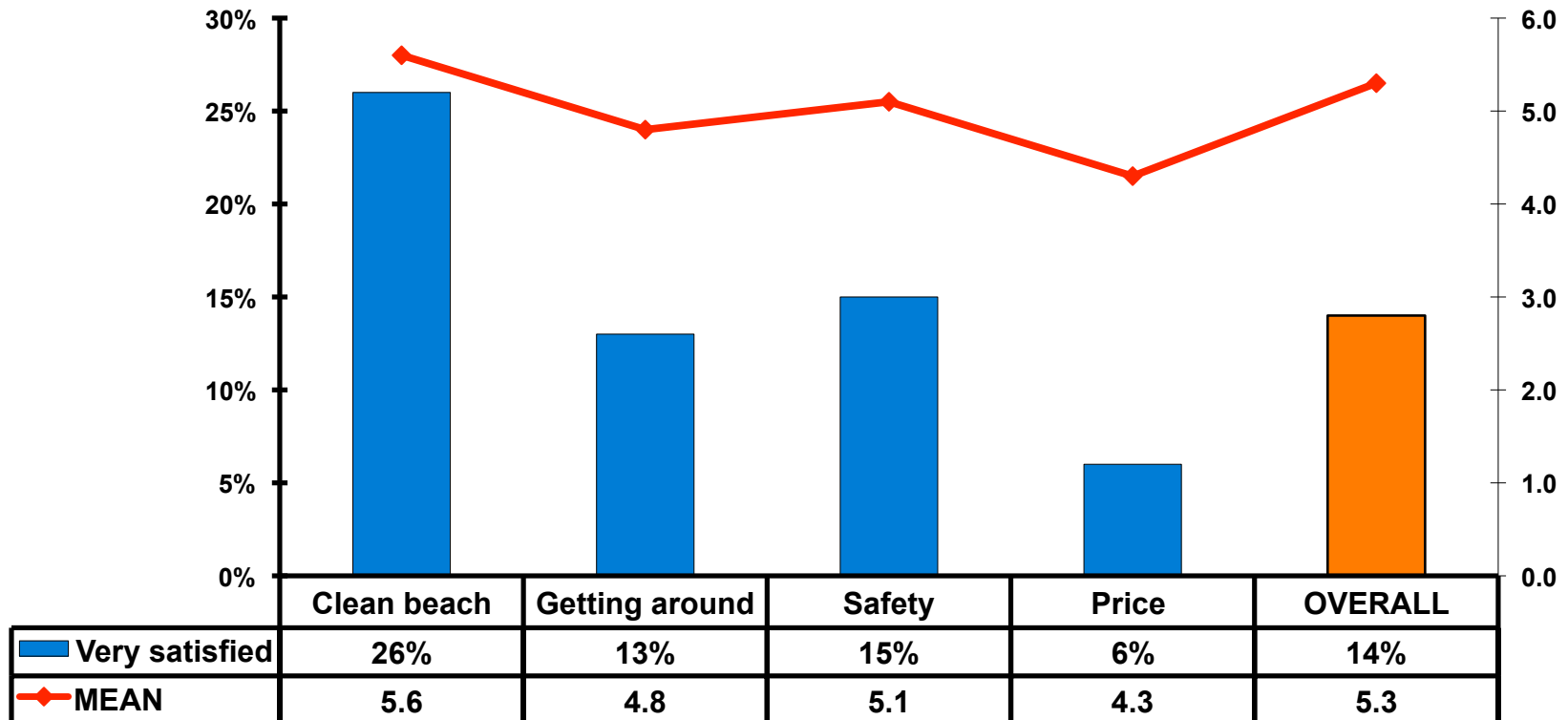
	MEAN \$
Food & Beverages	\$5.70
Gifts/Souvenirs Self	\$19.70
Gifts/Souvenirs Others	\$14.60
Total	\$40.00

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

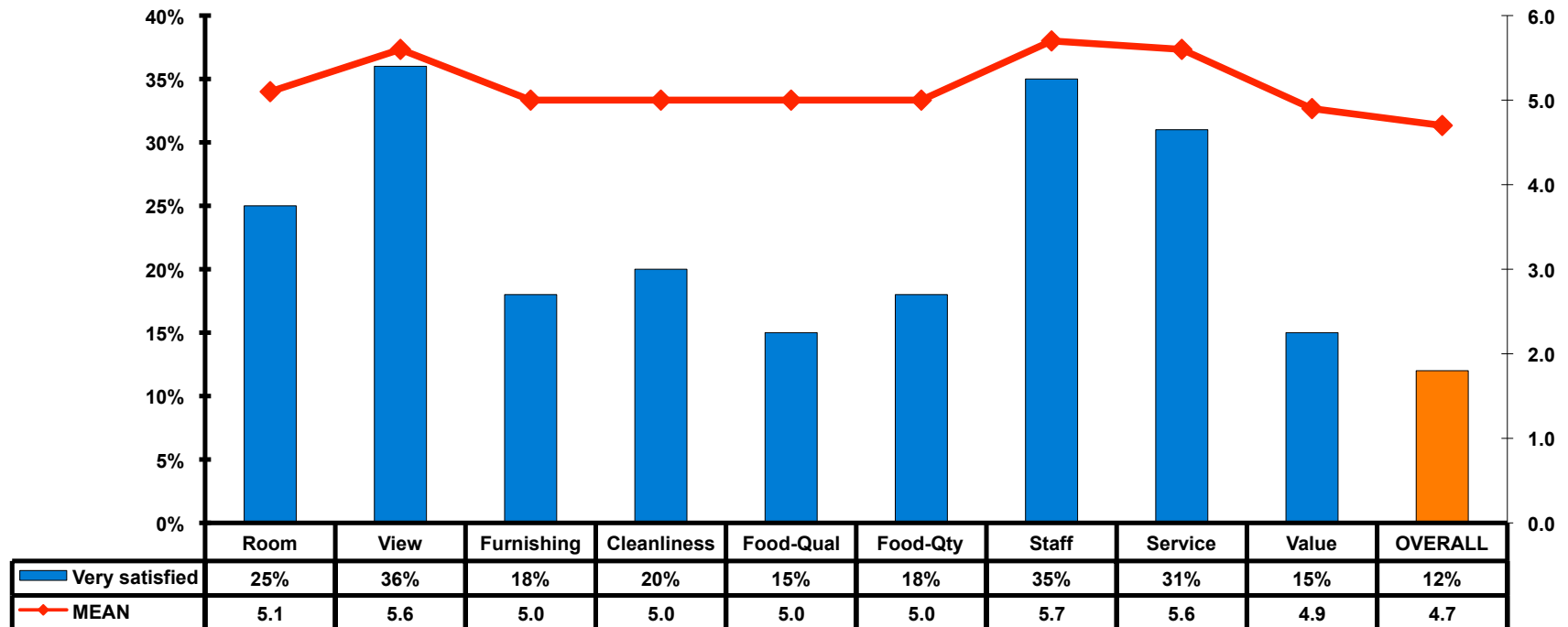
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

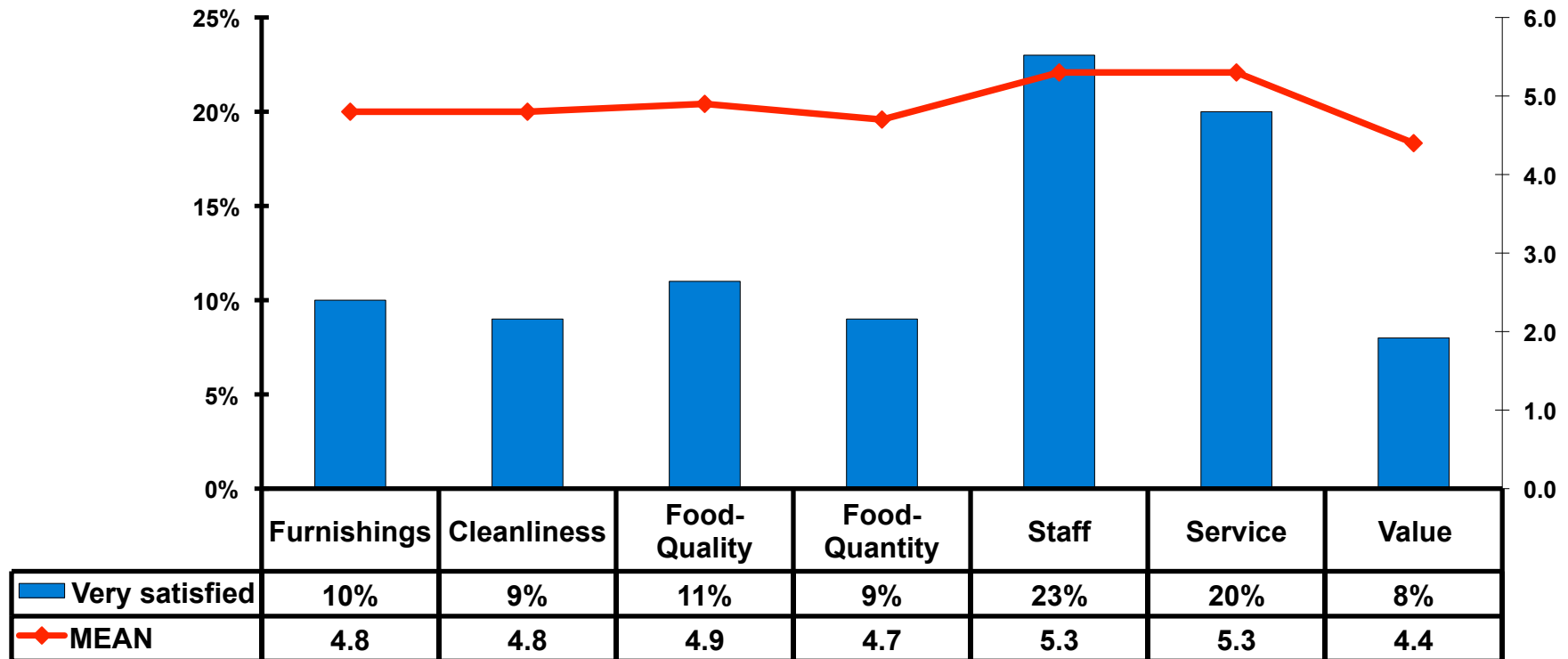
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

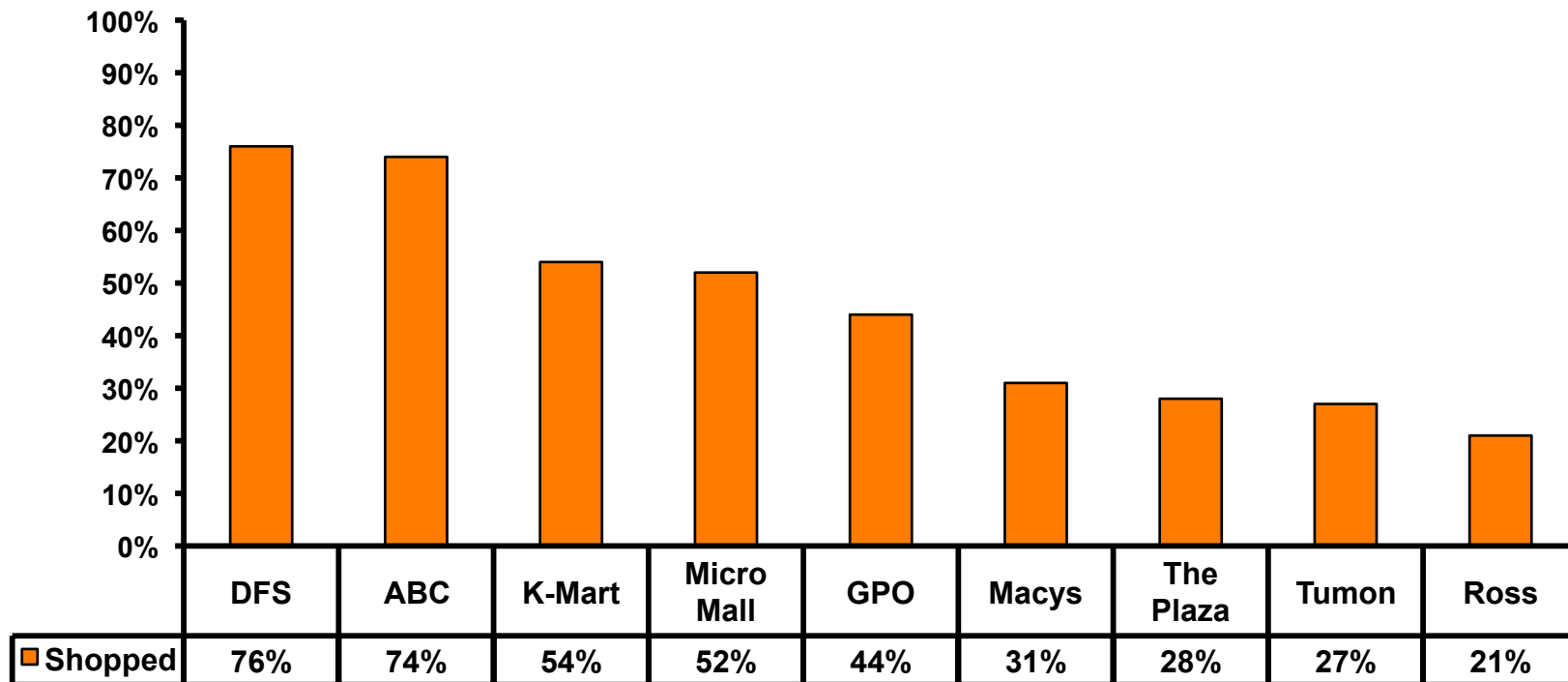
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

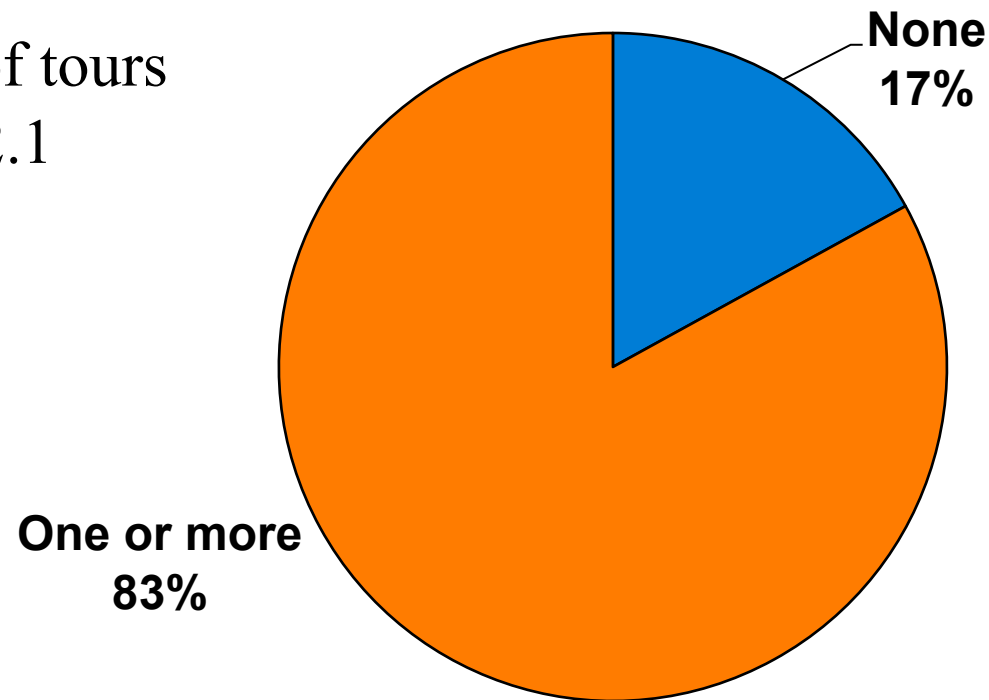
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 39%	Score of 6 to 7 = 36%
Score of 4 to 5 = 53%	Score of 4 to 5 = 48%
Score 1 to 3 = 9%	Score 1 to 3 = 17%
MEAN = 5.0	MEAN = 4.8

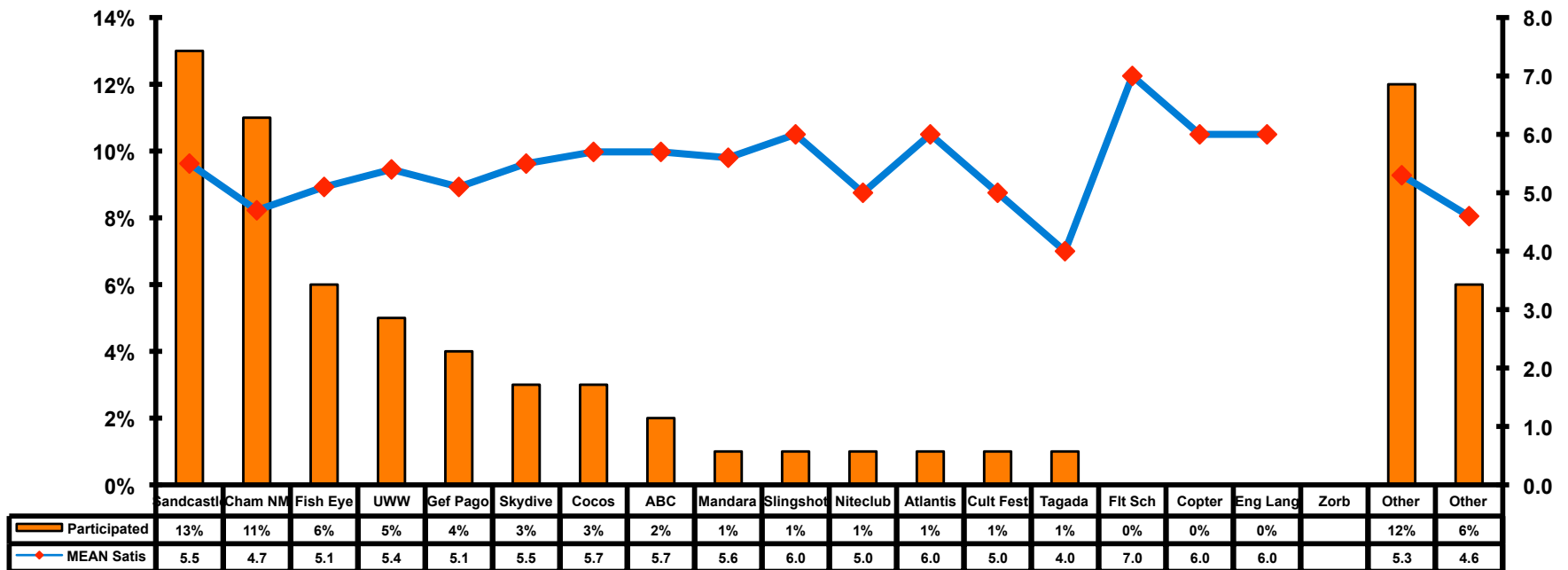
Optional Tour Participation

- Average number of tours participated in is 2.1



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 = 36%	Score of 6 to 7 = 31%
Score of 4 to 5 = 57%	Score of 4 to 5 = 56%
Score 1 to 3 = 7%	Score 1 to 3 = 14%
MEAN = 5.0	MEAN = 4.8

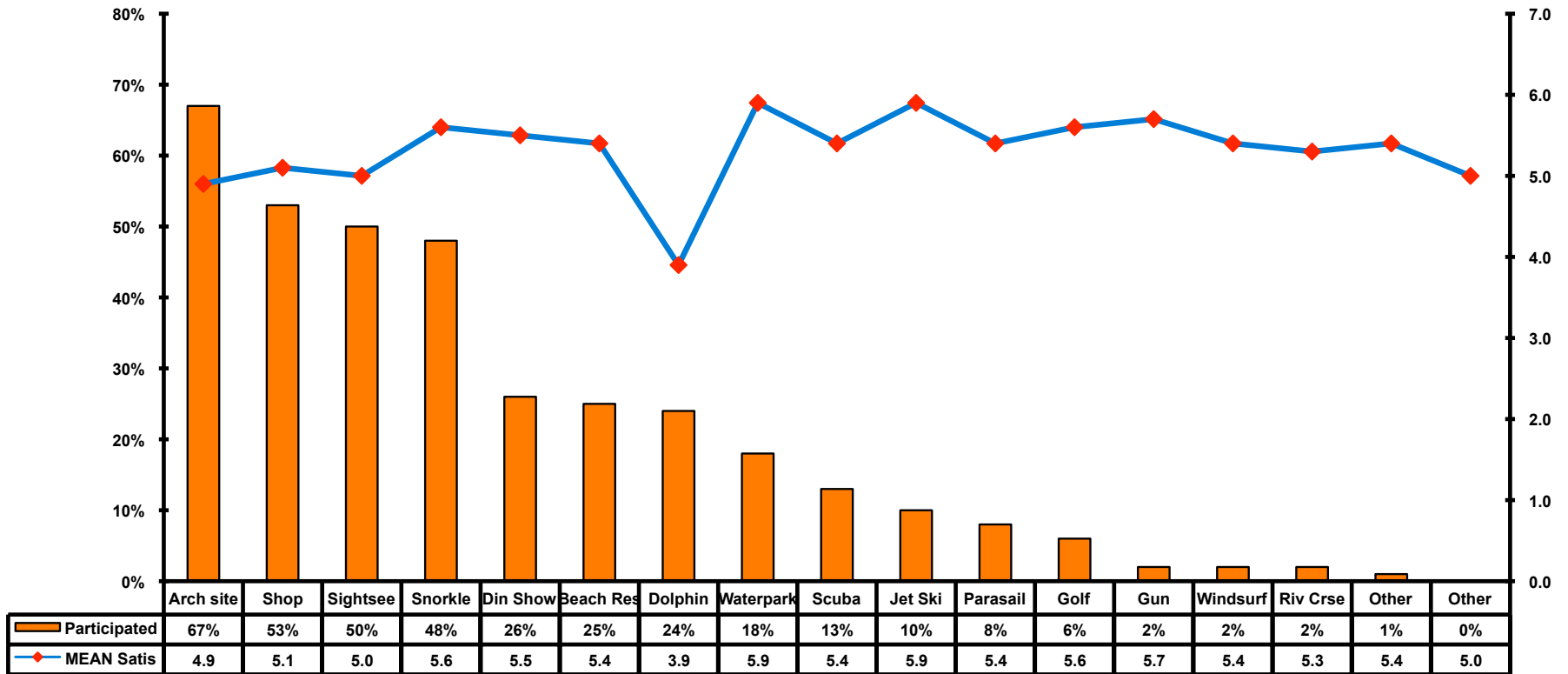
Night Tours Satisfaction

7pt Rating Scale

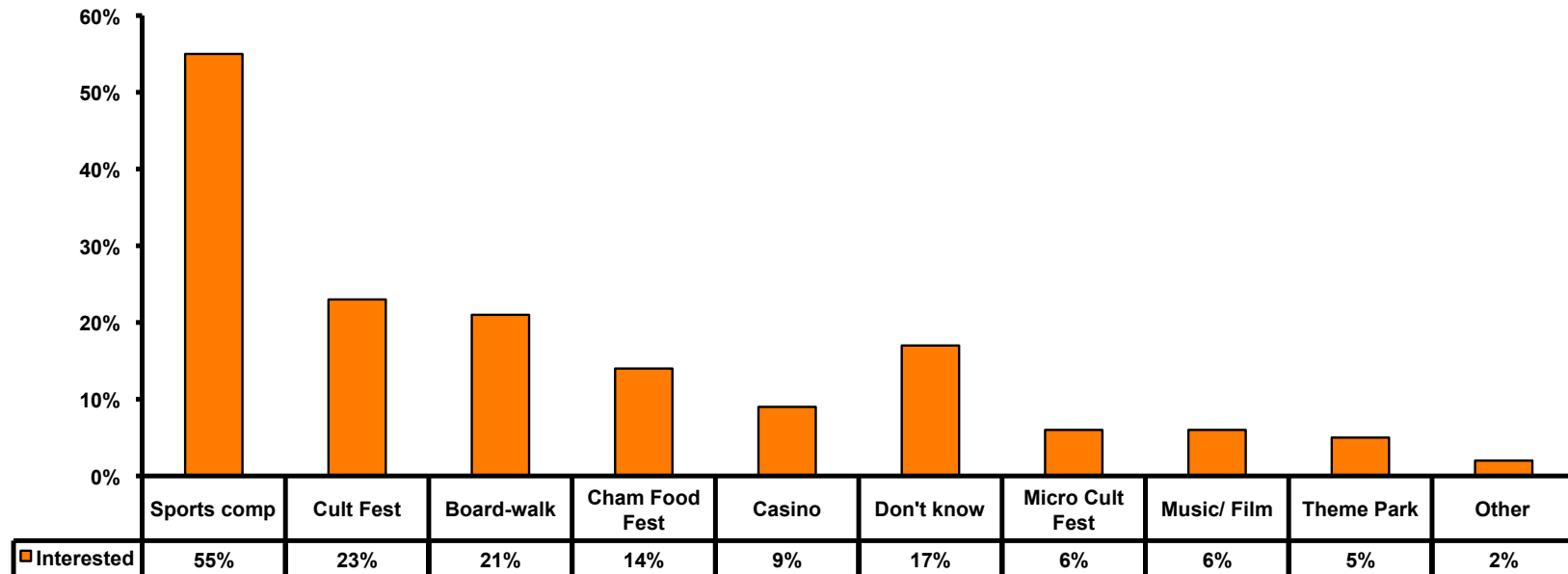
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 22%	Score of 6 to 7 = 18%
Score of 4 to 5 = 62%	Score of 4 to 5 = 61%
Score 1 to 3 = 15%	Score 1 to 3 = 21%
MEAN = 4.4	MEAN = 4.3

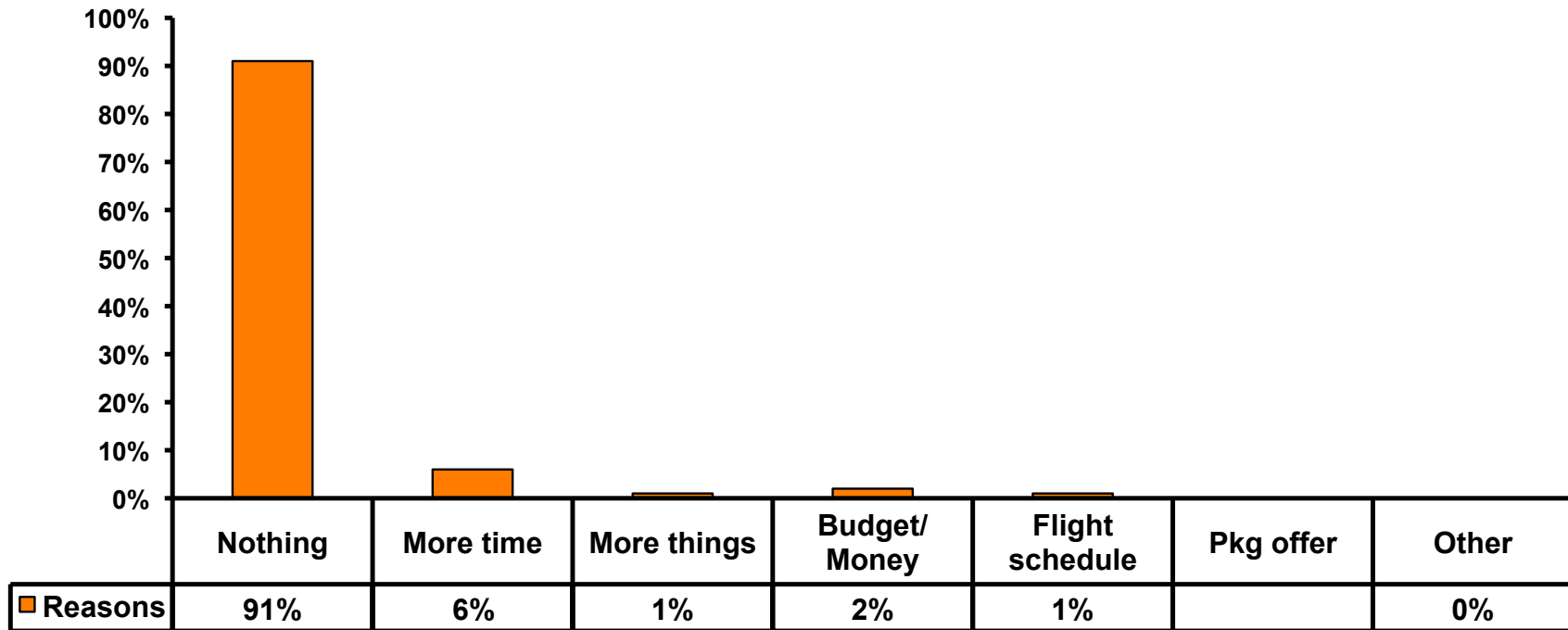
Satisfaction with Other Activities



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



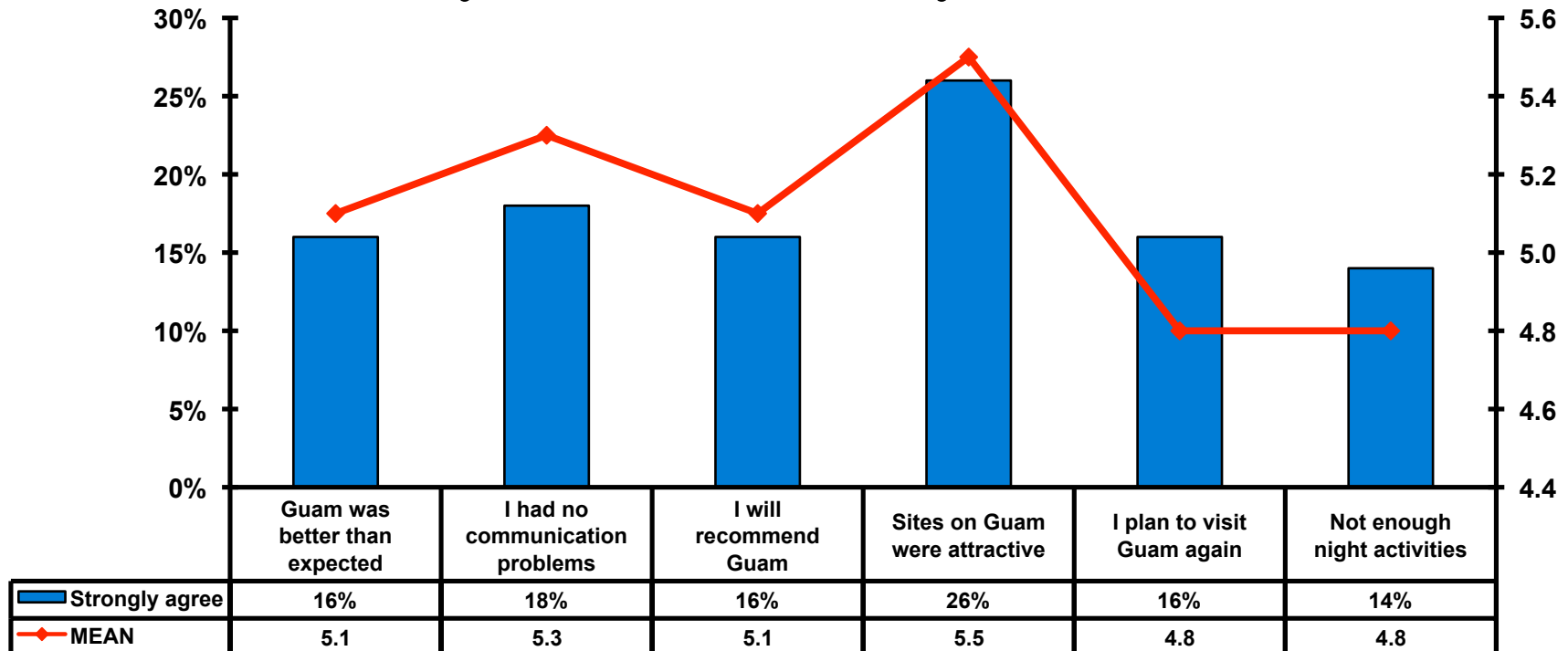
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

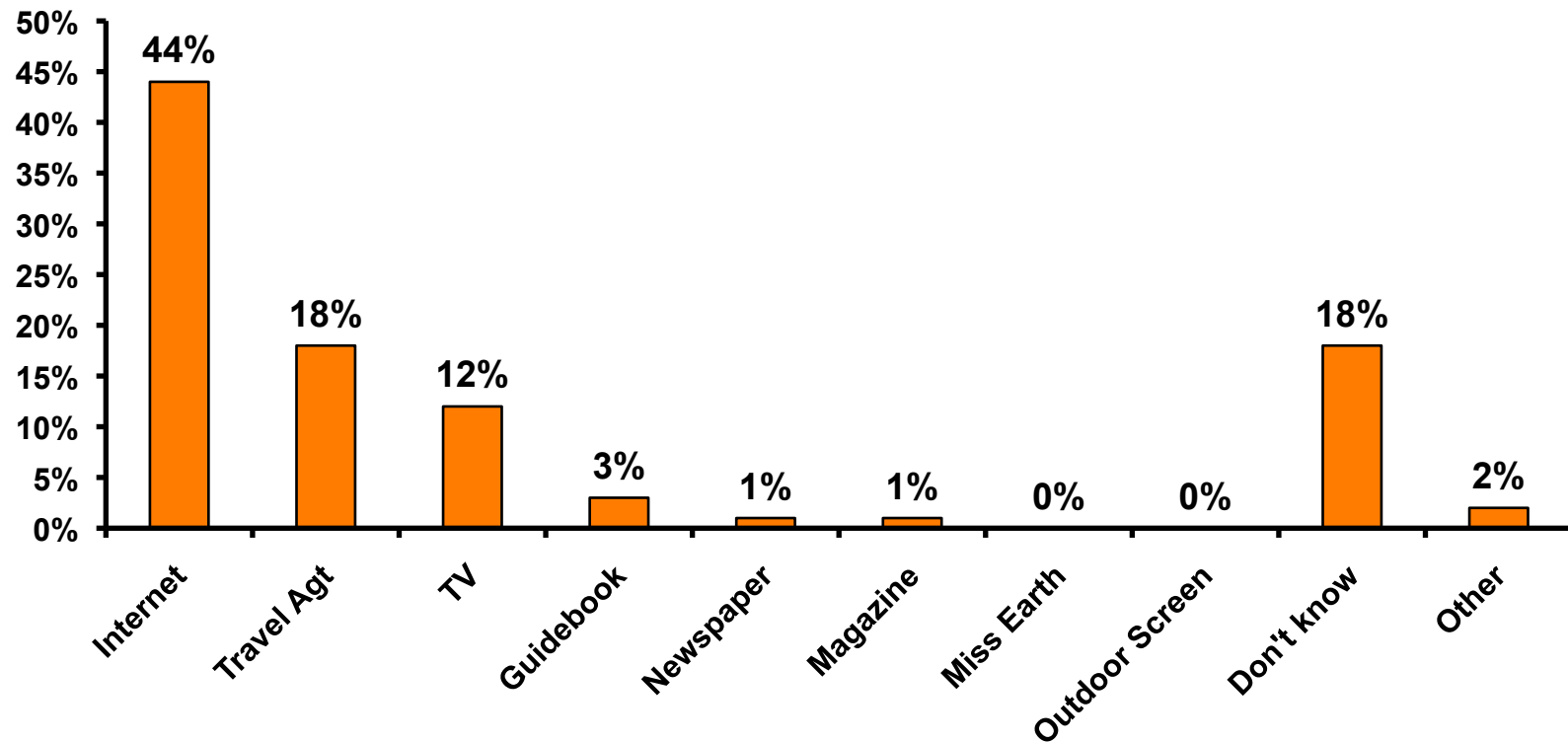
7=Very Satisfied/ 1=Very Dissatisfied



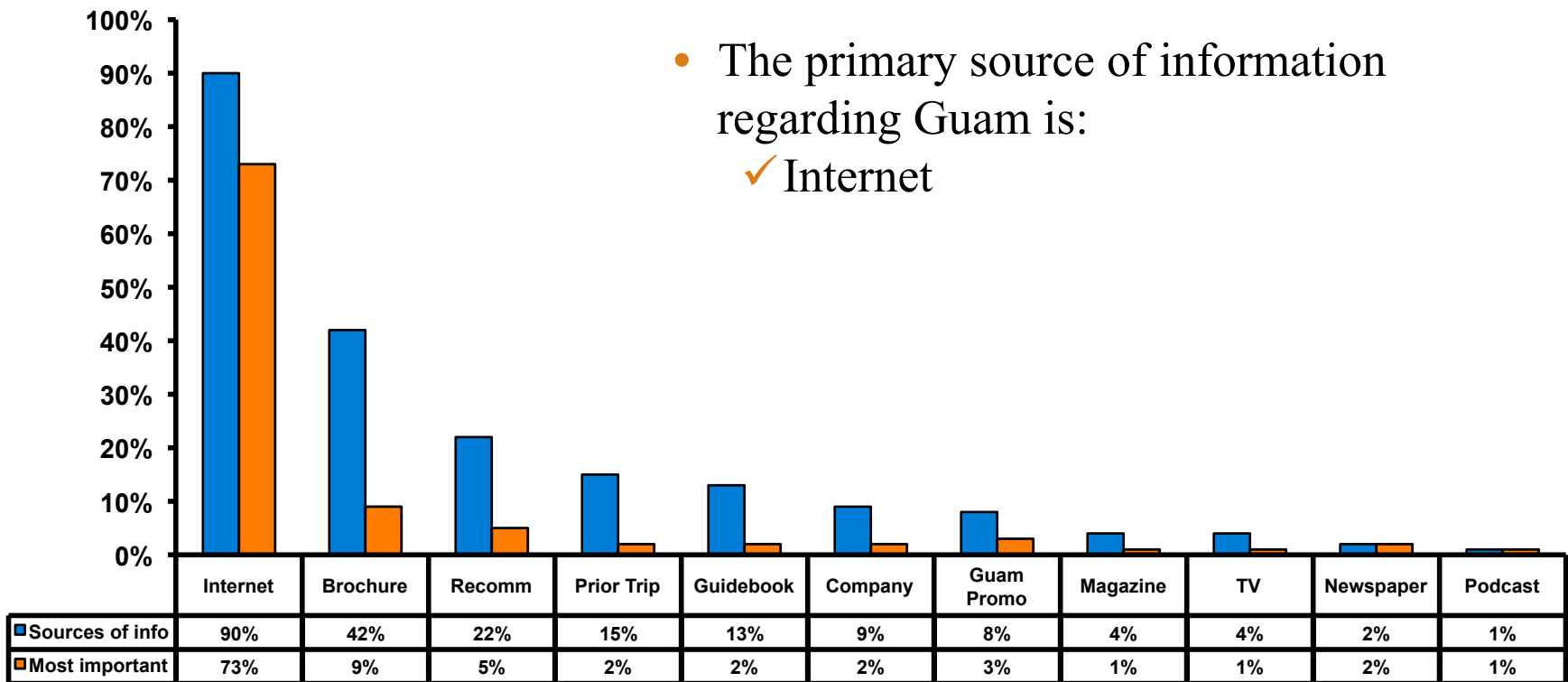
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

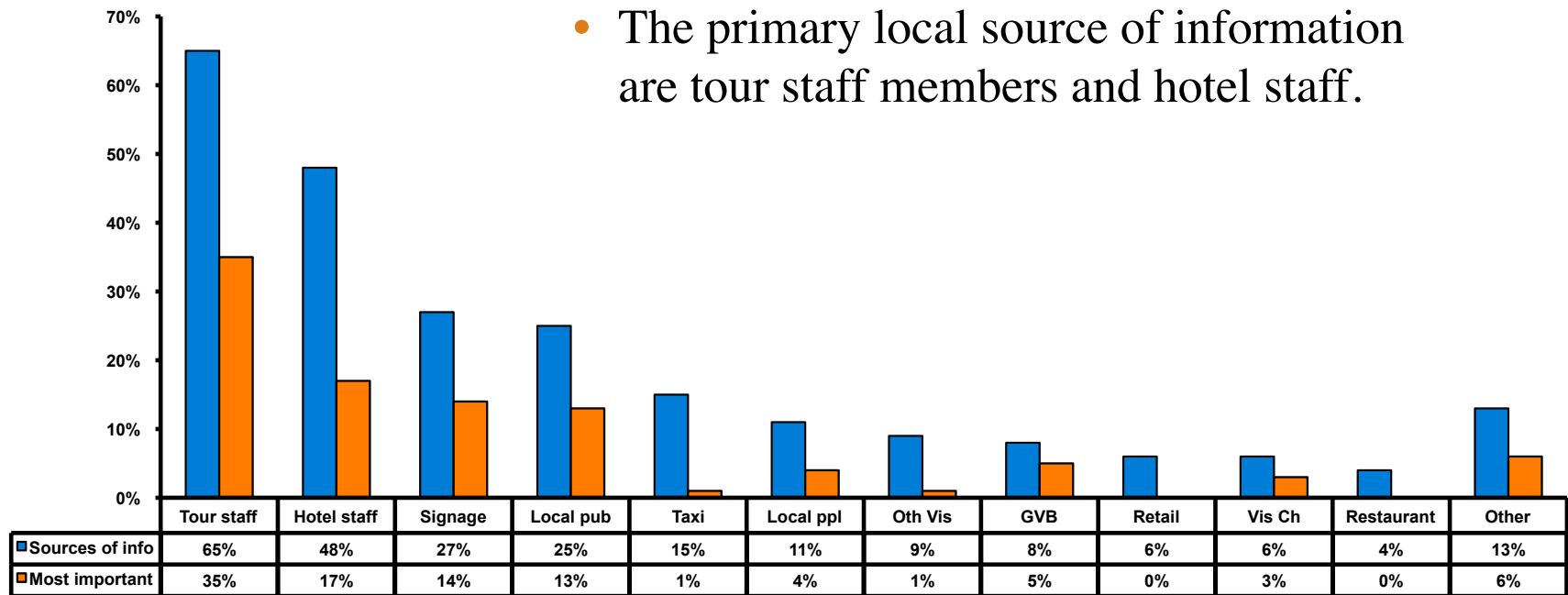


Sources of Information Pre-arrival



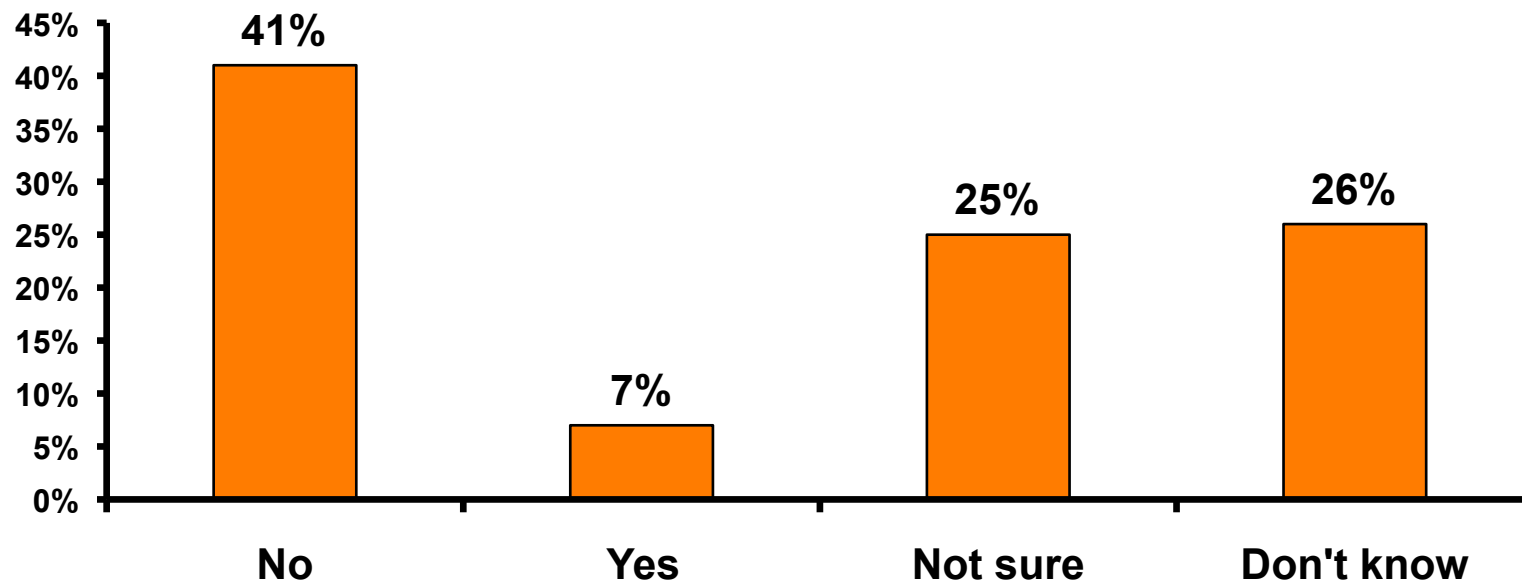
Sources of Information Post-arrival

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



SECTION 6
OTHER ISSUES

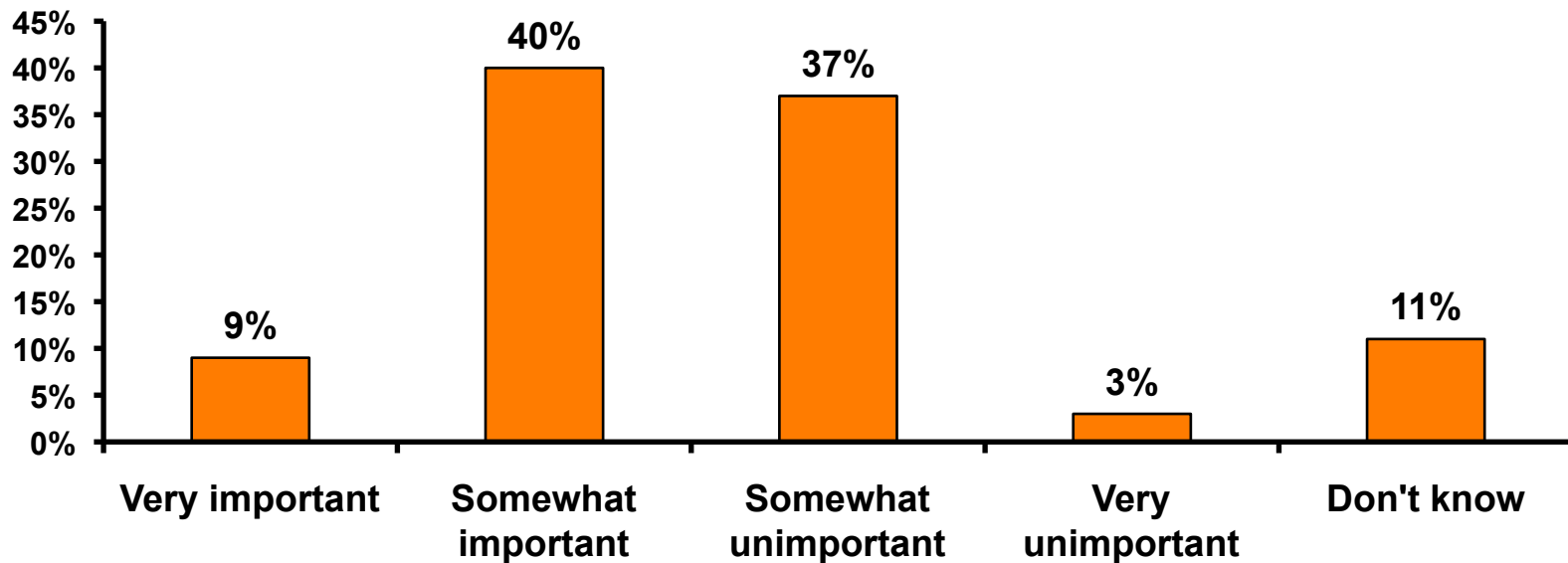
Good time to spend money on travel outside of Korea - Overall



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	50%	36%	44%	42%	33%	50%	43%	38%	44%	11%
	Yes	25%	4%	7%	8%	22%	6%	6%	7%	8%	22%
	Not sure		37%	23%	23%	11%	38%	22%	30%	24%	22%
	Do not know	25%	23%	27%	27%	33%	6%	29%	25%	24%	44%
Total	Count	4	70	181	86	9	16	94	87	131	9

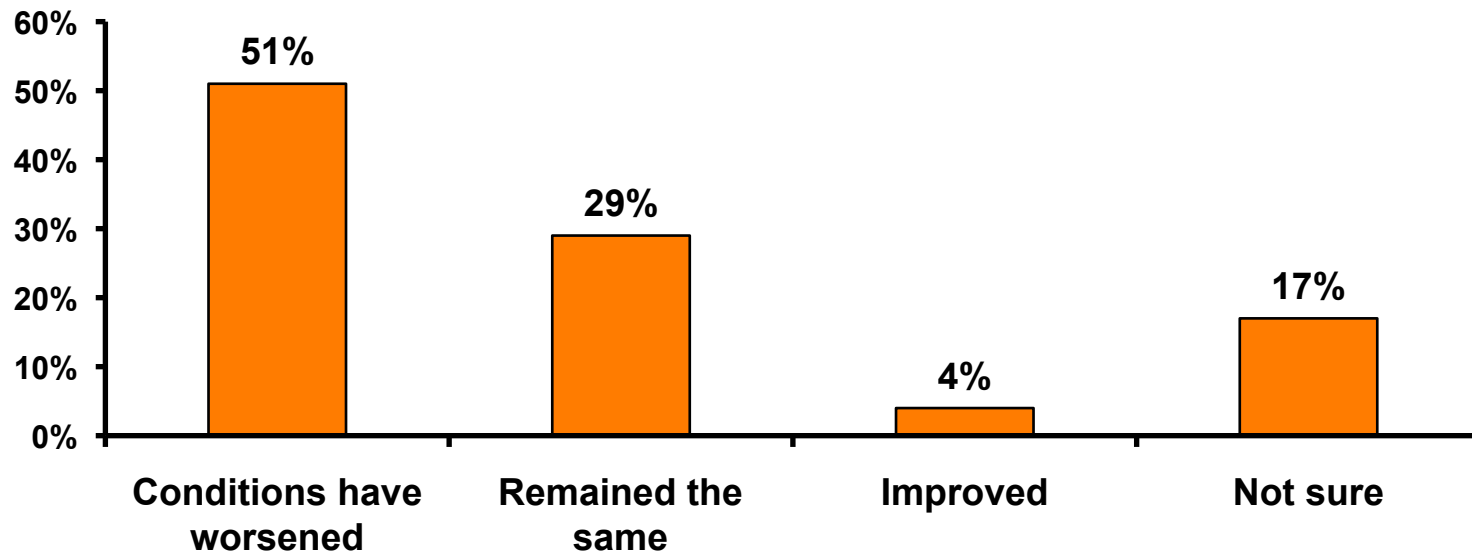
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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%	2%	5%		6%	2%	2%	3%	
	Somewhat unimportant	75%	33%	40%	32%	44%	25%	29%	44%	42%	44%
	Somewhat important	25%	41%	38%	45%	33%	69%	42%	43%	35%	44%
	Very important		9%	8%	9%	11%		11%	3%	11%	
	Don't know		12%	12%	9%	11%		16%	8%	9%	11%
Total	Count	4	69	181	85	9	16	93	87	130	9

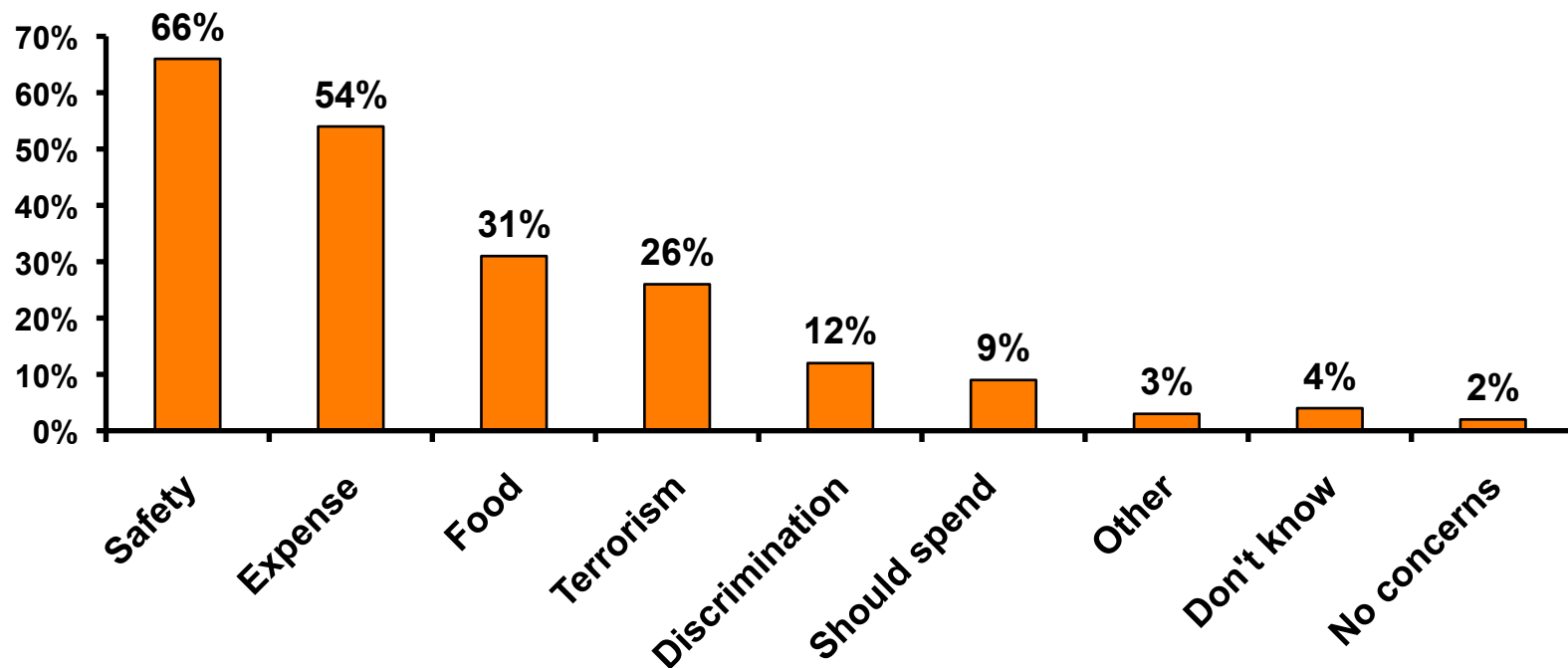
Rating Korean Economy Compared to 12 months ago



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%	37%	49%	63%	67%	50%	54%	49%	50%	44%
	Conditions have remained the same		33%	31%	20%	33%	6%	24%	38%	27%	33%
	Conditions have improved	50%	9%	2%	3%		6%	5%		5%	
	Do not know		21%	18%	14%		38%	16%	13%	17%	22%
Total	Count	4	70	181	86	9	16	94	87	131	9

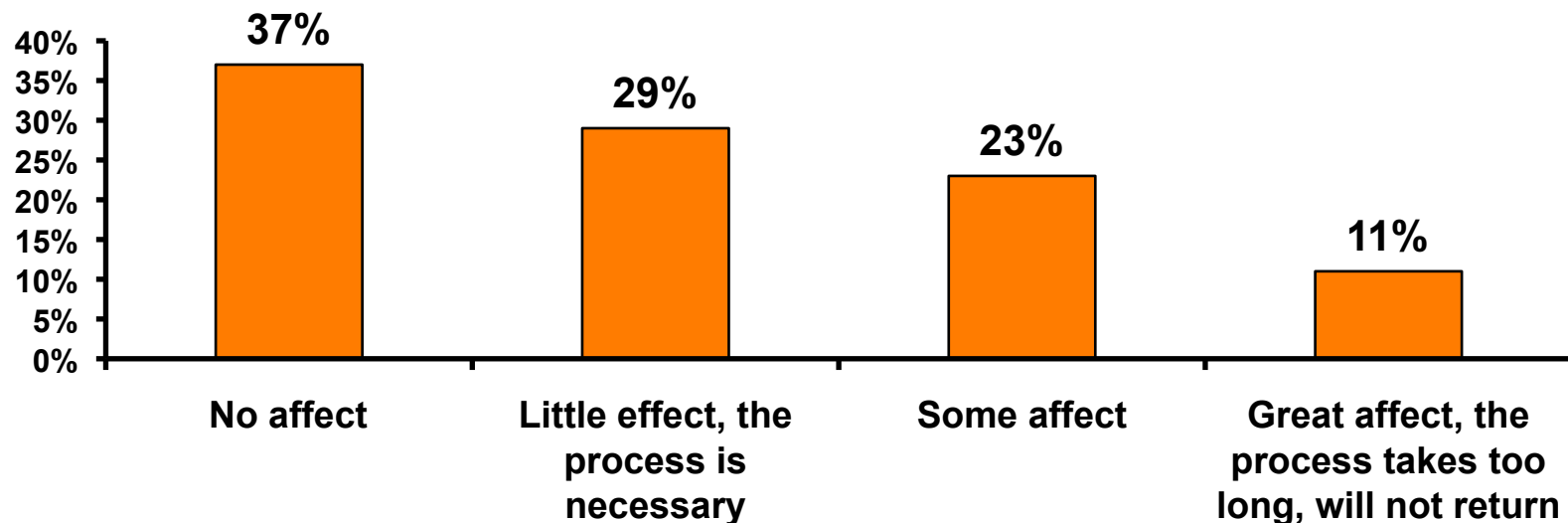
Concerns about travel outside of Korea - Overall



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	50%	56%	67%	71%	78%	44%	69%	63%	69%	67%	
Expense	50%	53%	58%	49%	56%	56%	60%	55%	51%	33%	
Food	50%	24%	31%	36%	22%	31%	30%	24%	38%	11%	
Terrorism	25%	24%	27%	24%	44%	31%	28%	23%	27%	33%	
Spending money abroad when it should be spent at home	25%	10%	8%	9%	11%		10%	7%	12%		
Do not know		4%	4%	4%	11%	19%	2%	1%	4%	22%	
Other		6%	2%	1%		6%	3%	2%	2%		
No concerns	25%	3%	3%				2%	3%	2%		
Total	Cases	4	70	180	85	9	16	94	86	130	9

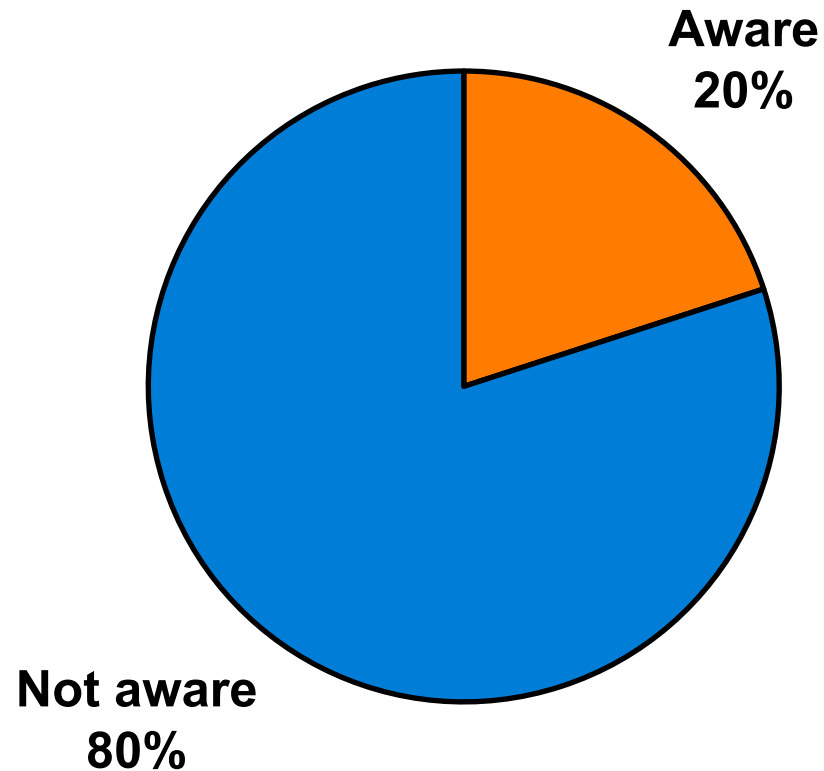
Security Screening/ Immigration Process at Guam International Airport



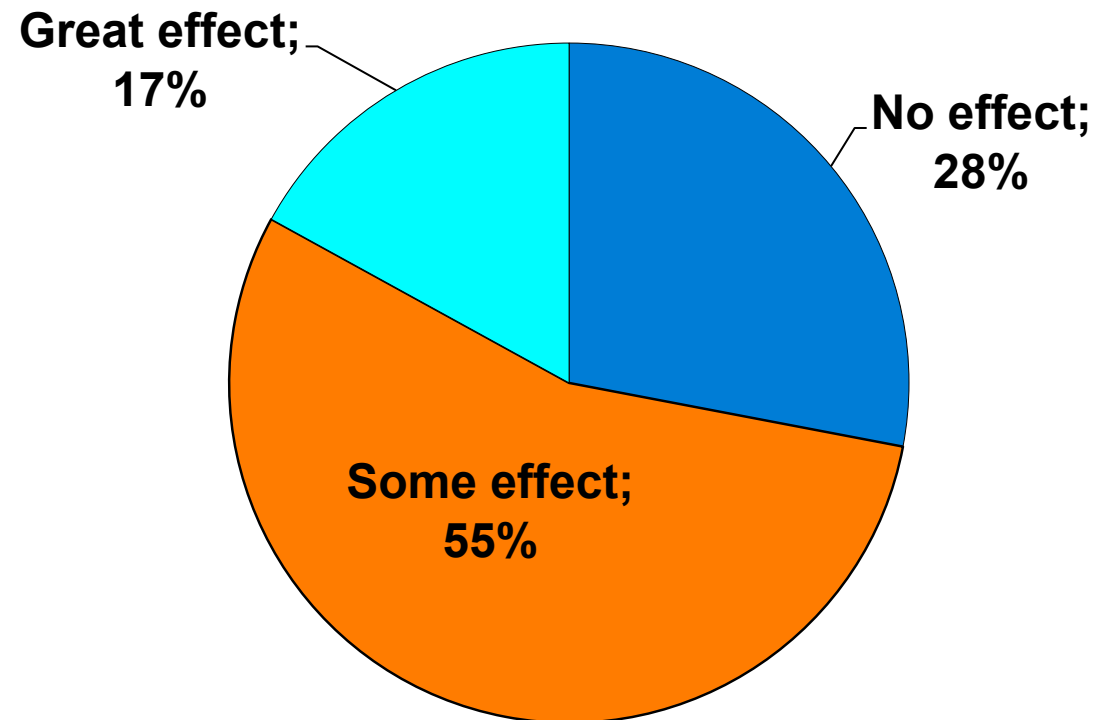
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.0** out of possible 7.0
- Agree (Score 6-7) – **8%**
- Neutral (Score 4-5) – **39%**
- Disagree (Score 1-3) – **53%**

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



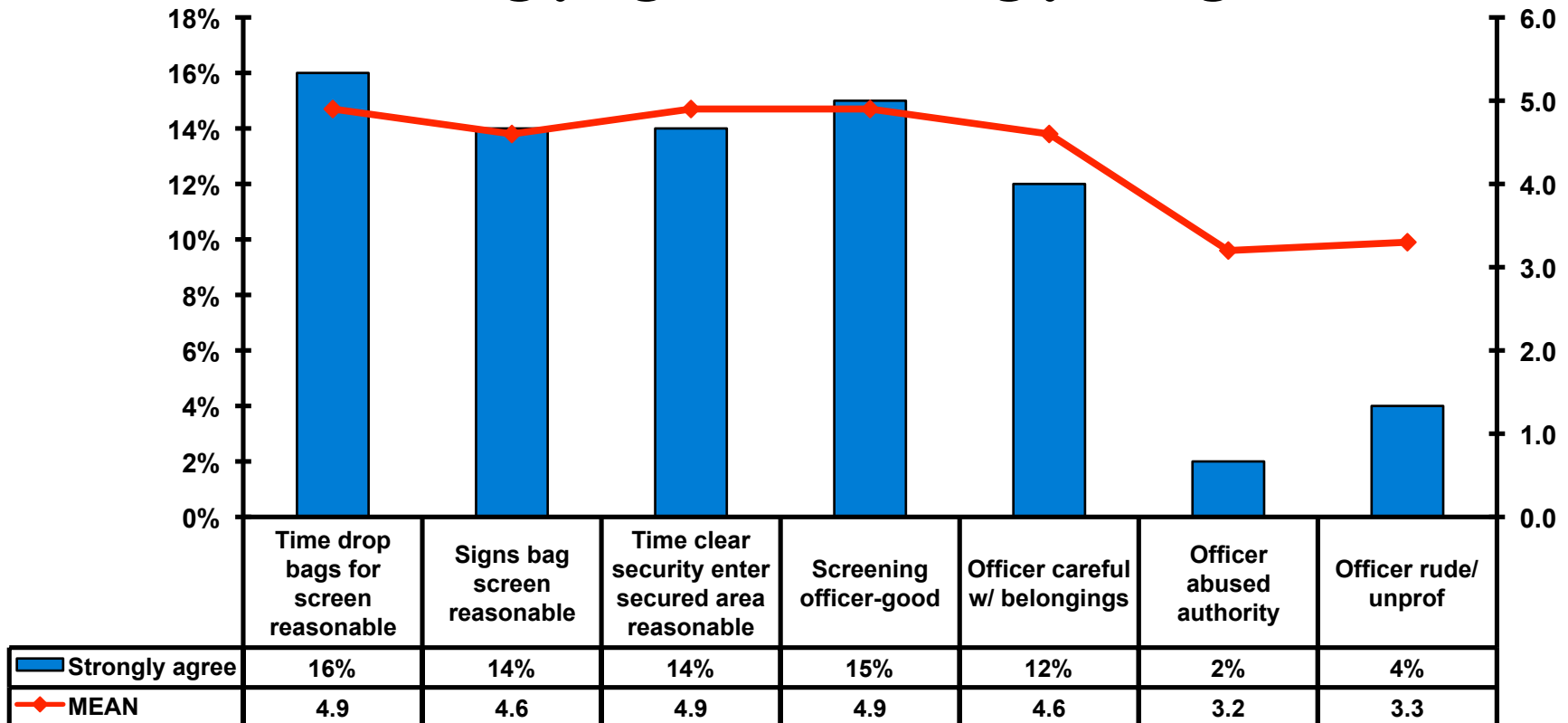
Effects of U.S. military troop movement on future trips to Guam



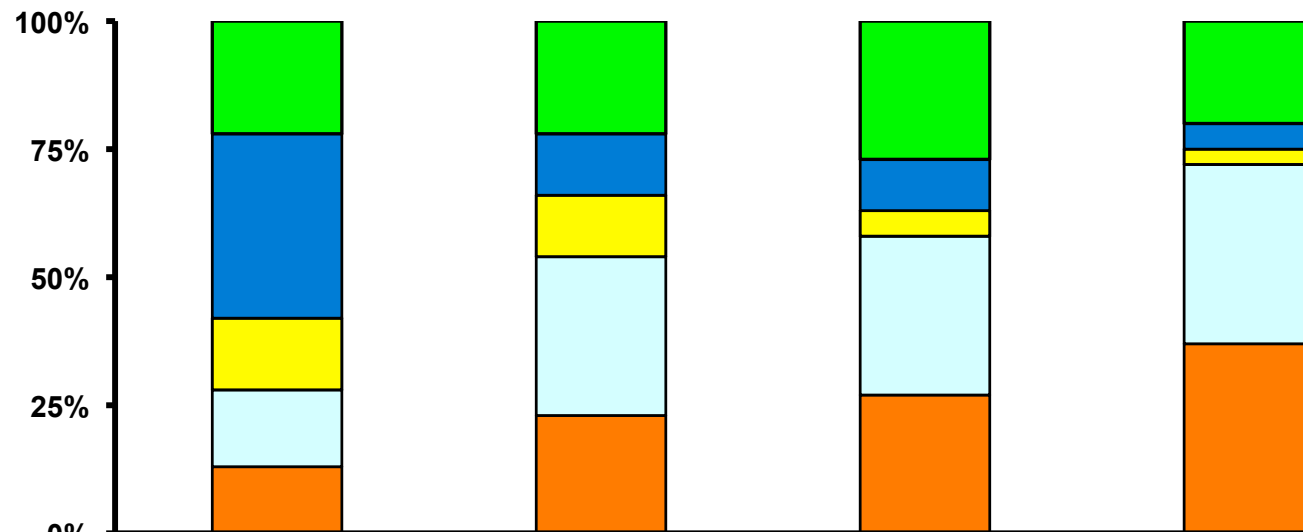
Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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



	6 months	12 months	18 months	24 months
■ Unsure	22%	22%	27%	20%
■ Very unlikely	36%	12%	10%	5%
■ Somewhat unlikely	14%	12%	5%	3%
■ Somewhat likely	15%	31%	31%	35%
■ Very likely	13%	23%	27%	37%