



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

DECEMBER 2009



Prepared by: QMark Research

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Background & Methodology

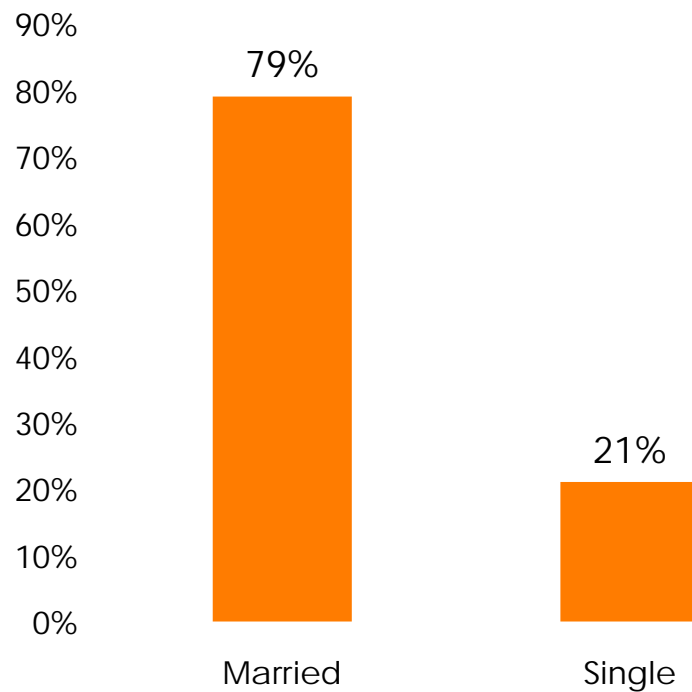
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing Korean 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 **353** 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.

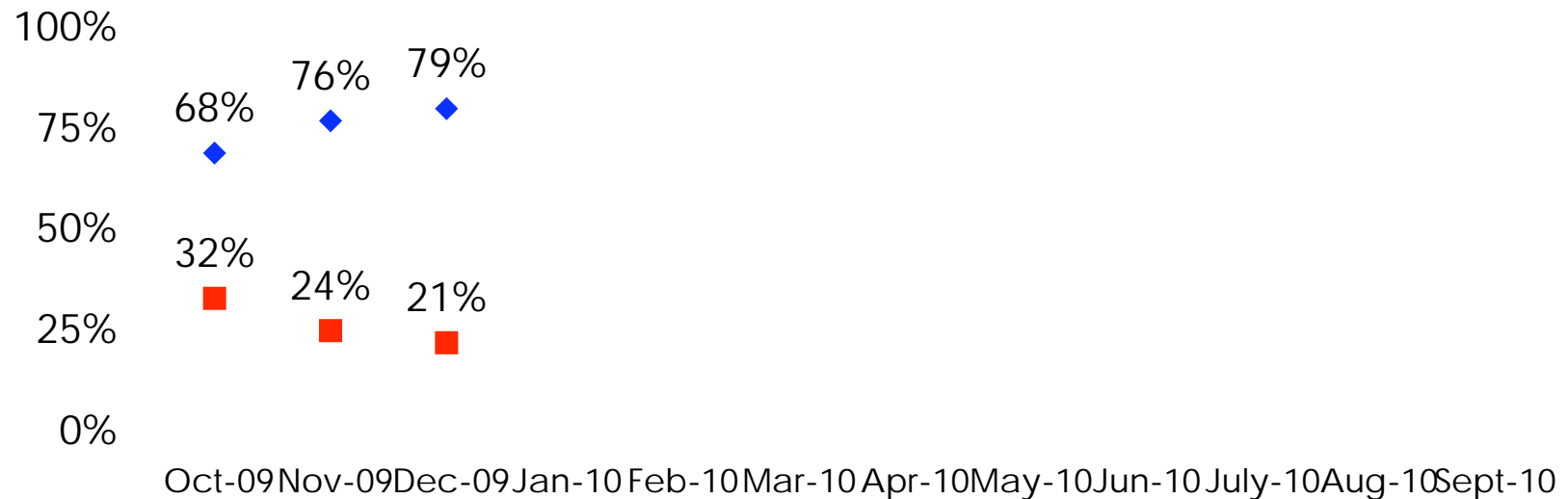
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall



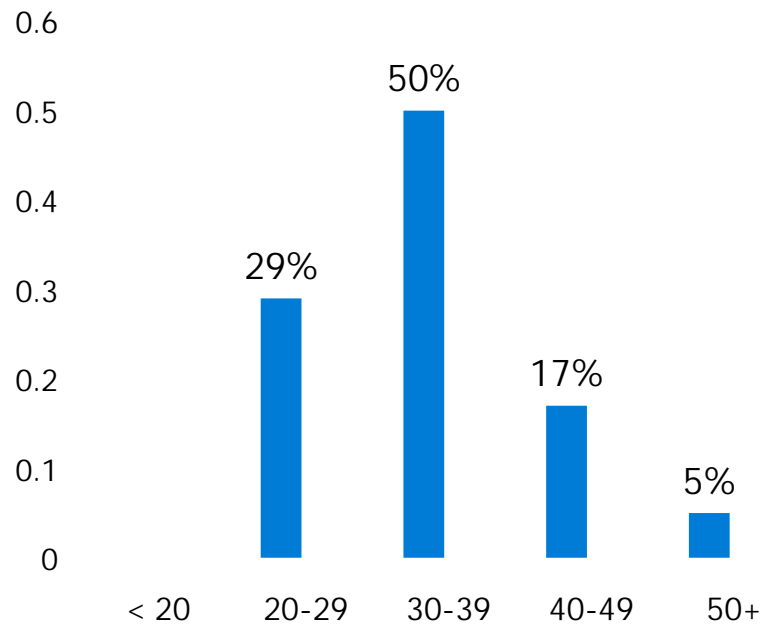
- A majority of visitors are married.

Marital Status



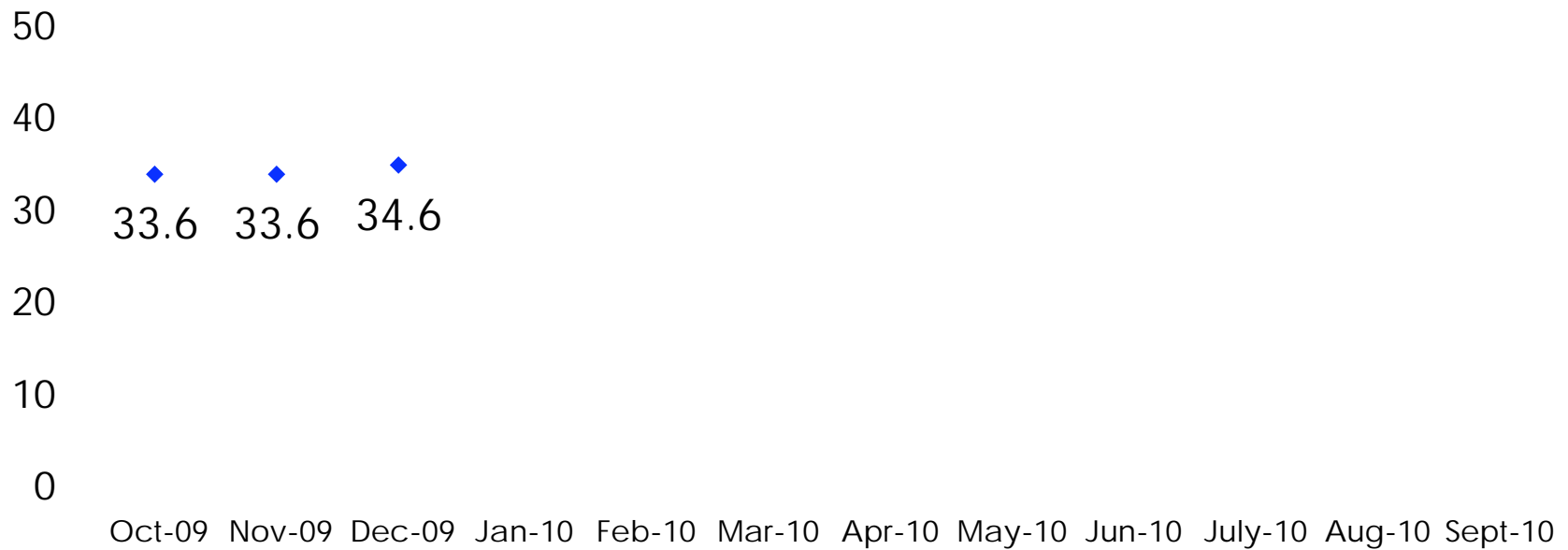
◆ Married ■ Single

Age - Overall

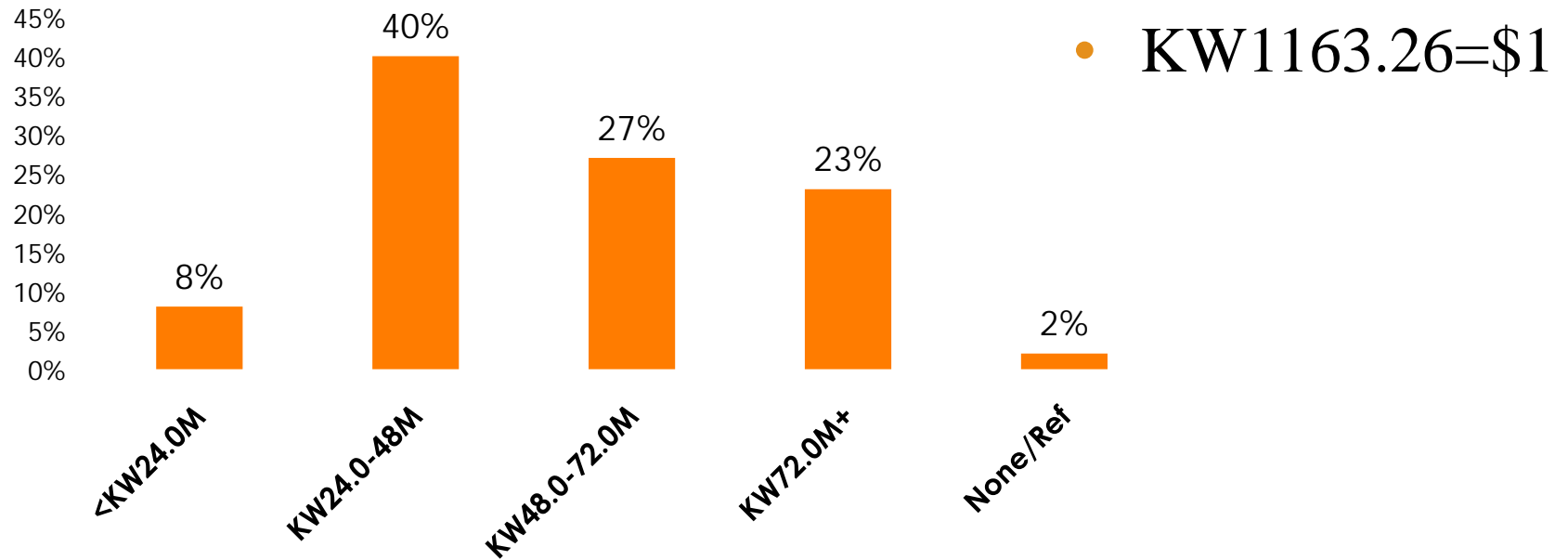


- The average age of the respondents is 34.6 years of age.

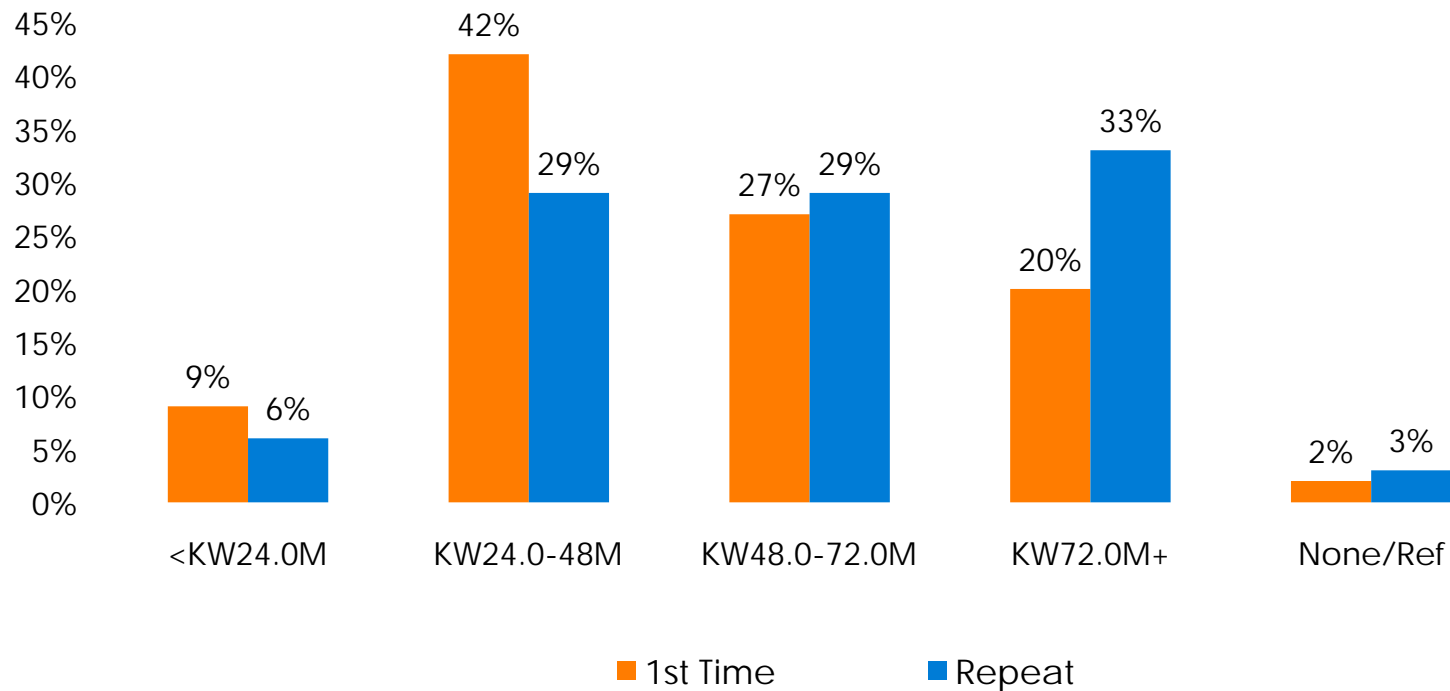
Average - Age



Personal Income



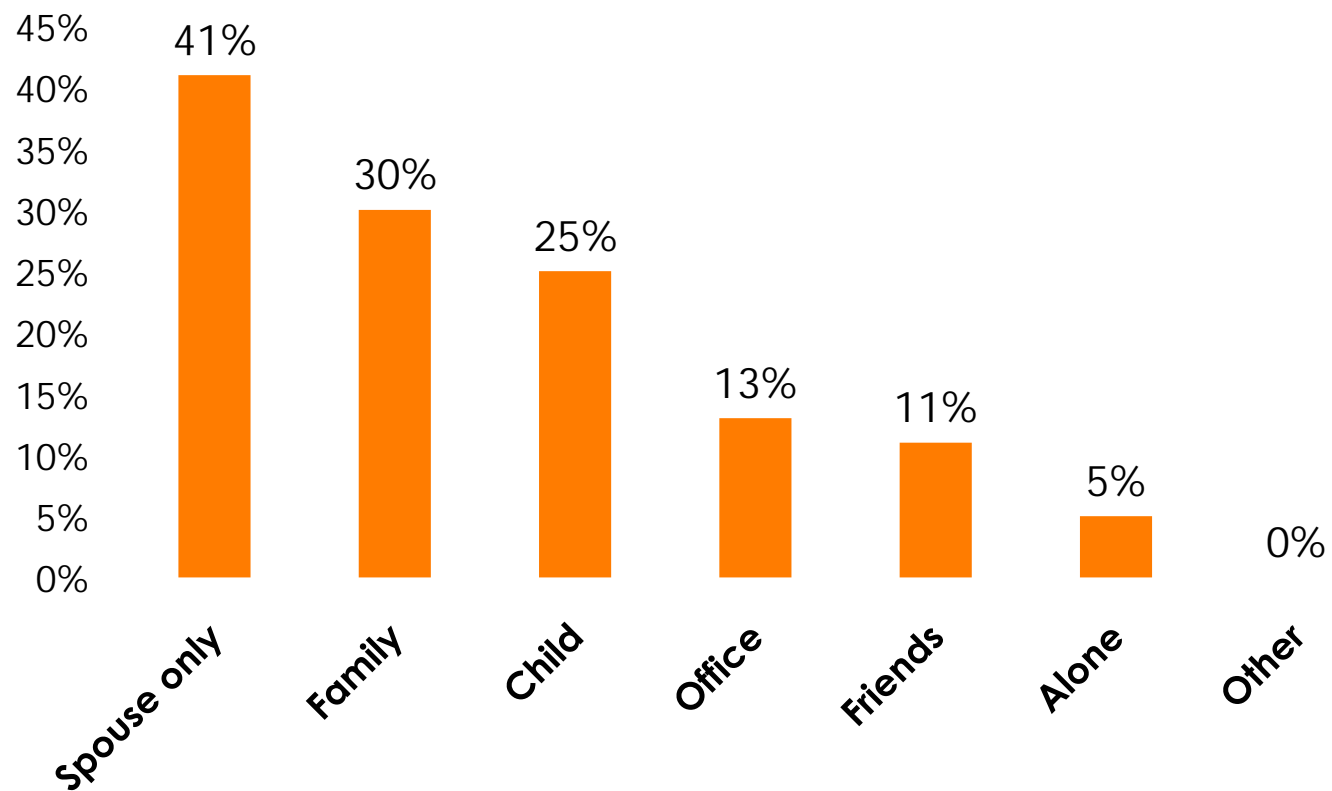
Personal Income 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	27	13	14	13	12	1	1
			8%	7%	8%	13%	7%	2%	6%
	KW24.0M-KW48.0M	Count	136	57	79	58	57	17	4
			40%	32%	48%	58%	35%	28%	25%
	KW48.0M-KW72.0M	Count	93	52	41	21	46	20	6
			27%	30%	25%	21%	28%	33%	38%
	KW72.0M+	Count	77	51	26	5	46	21	5
			23%	29%	16%	5%	28%	35%	31%
	Refused	Count	8	3	5	3	4	1	
			2%	2%	3%	3%	2%	2%	
Total	Count		341	176	165	100	165	60	16

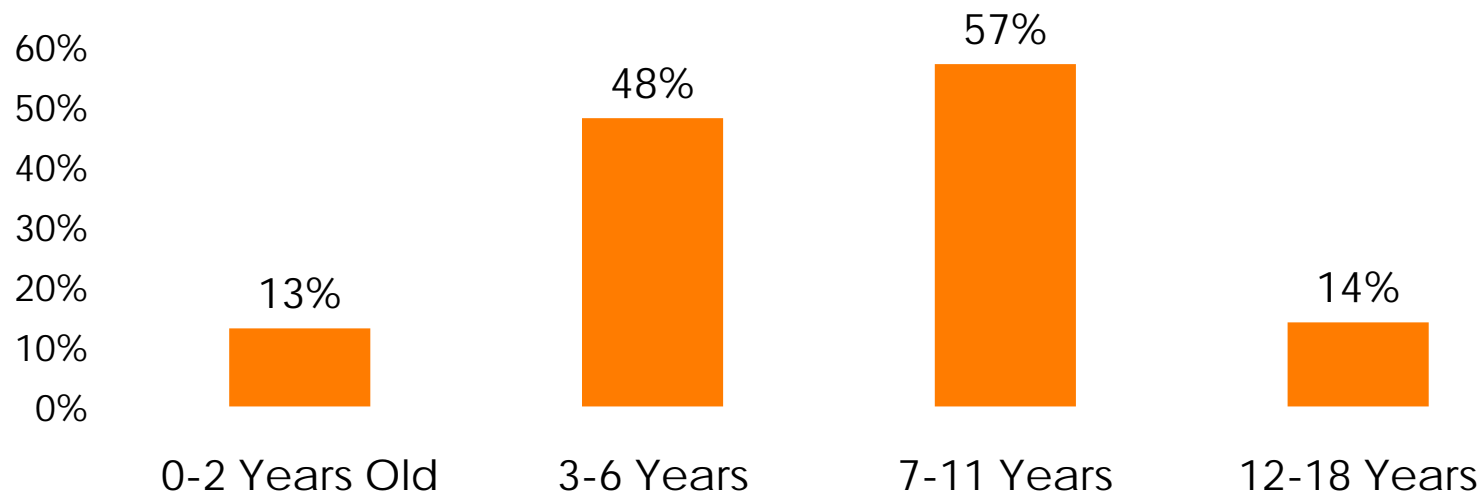
Travel Companions



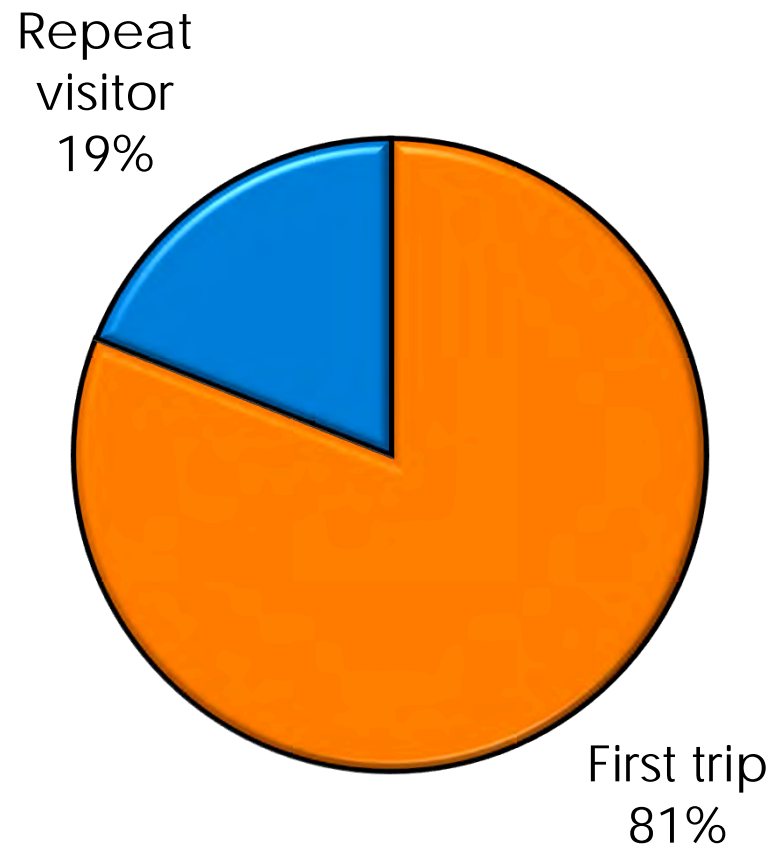
Number of Children Travel Party

N=107 total respondents traveling with children.

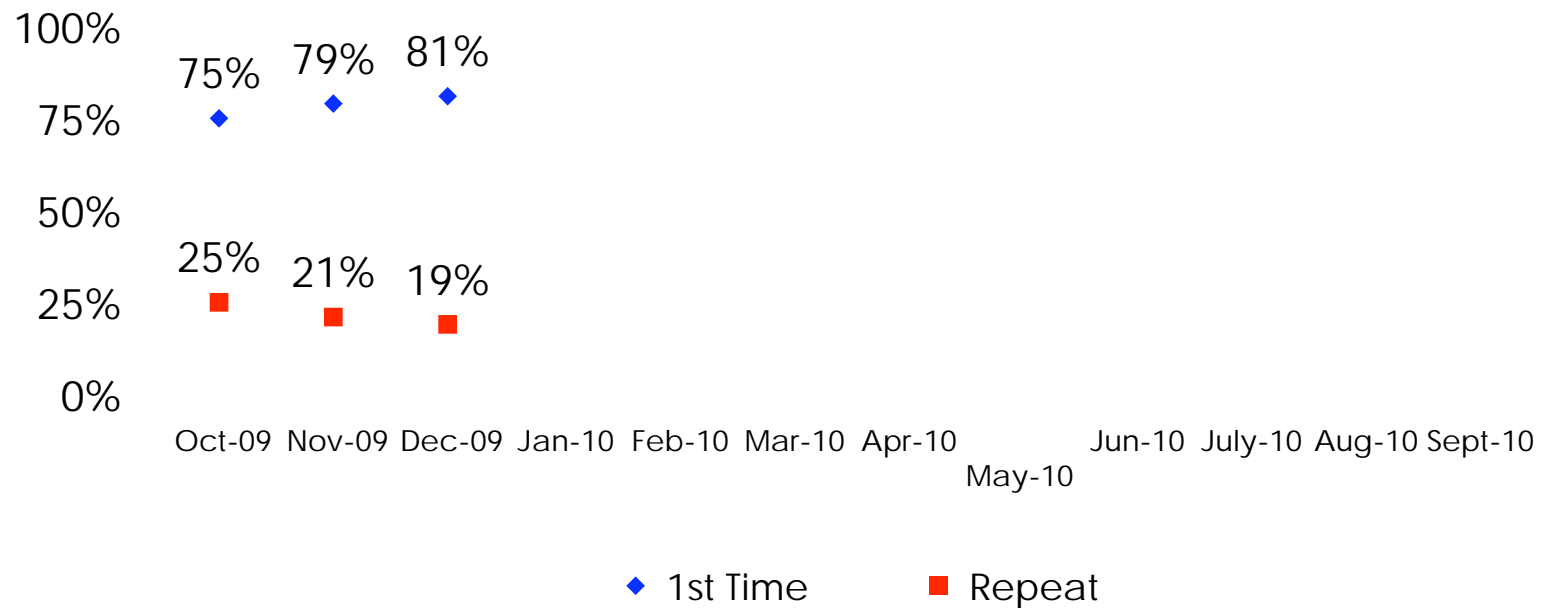
(Of those N=107 respondents, there is a total of 136 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



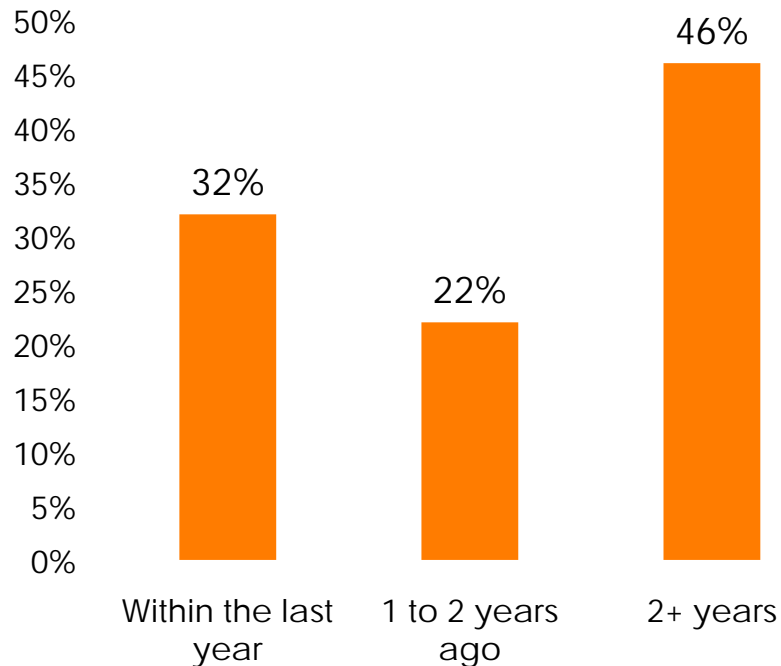
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	177	142	35
			50%	49%	53%
	Female	Count	176	145	31
			50%	51%	47%
Total		Count	353	287	66
AGE	20-29	Count	101	89	12
			29%	31%	18%
	30-39	Count	175	148	27
			50%	52%	41%
	40-49	Count	61	39	22
			17%	14%	33%
	50+	Count	16	11	5
			5%	4%	8%
Total		Count	353	287	66

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

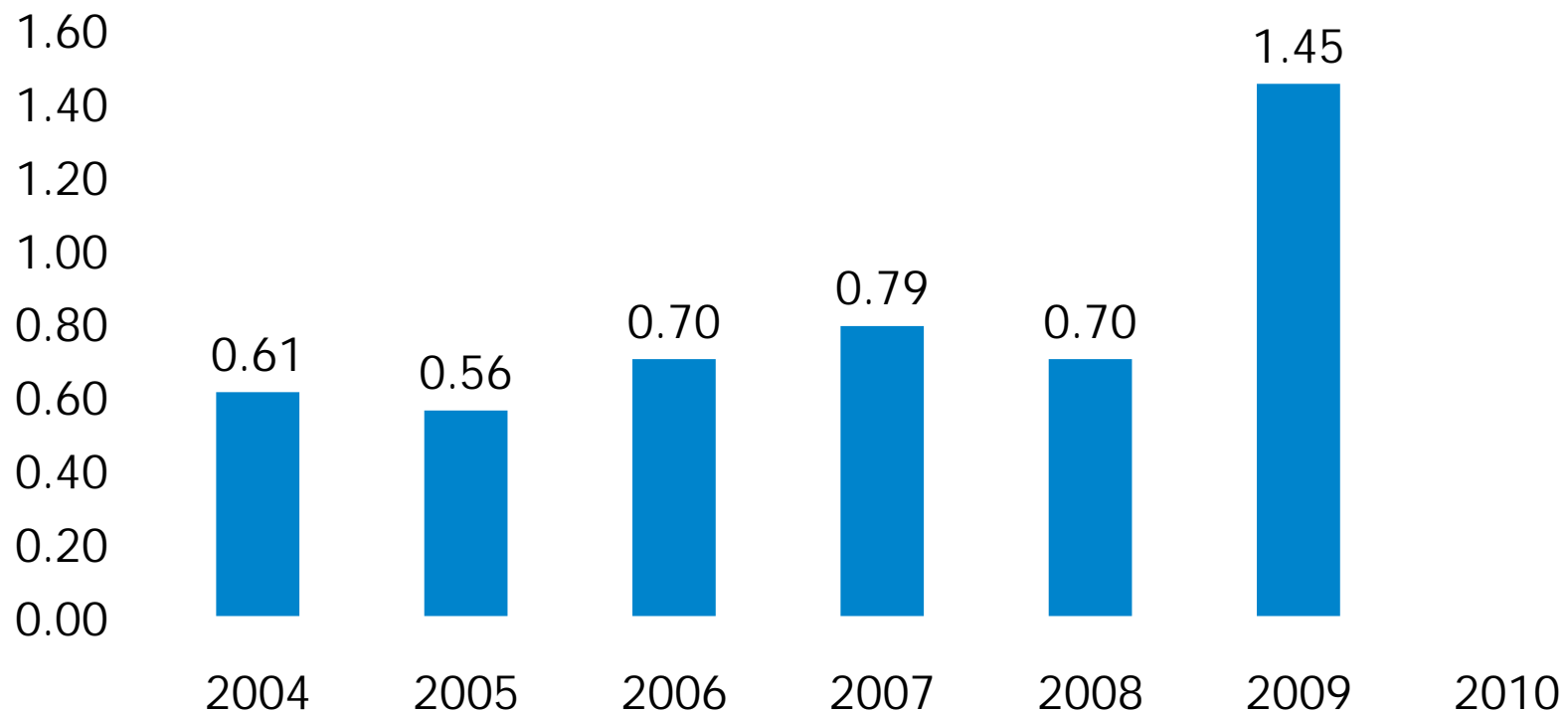
Repeat Visitors Last Trip

n = 65

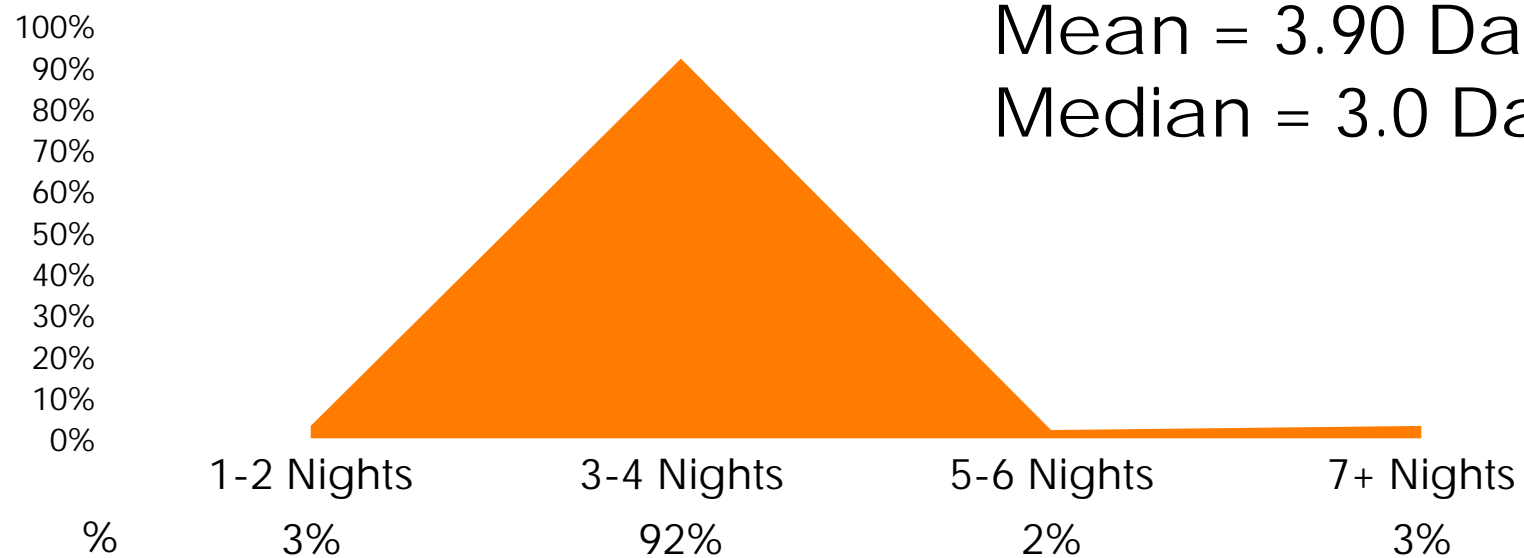


- The average repeat visitor has been to Guam 4.1 times.
- Two-thirds of the repeat visitors have been to Guam within the last 2 years.

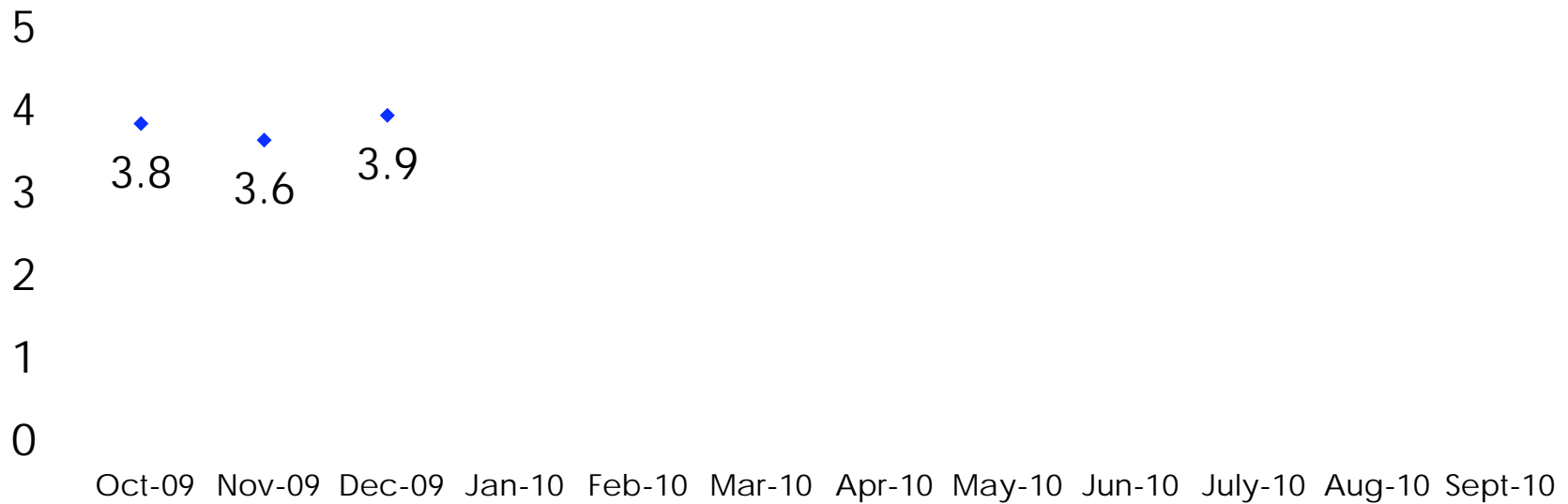
Average Number Overnight Trips (2004-2010) (2 nights or more)



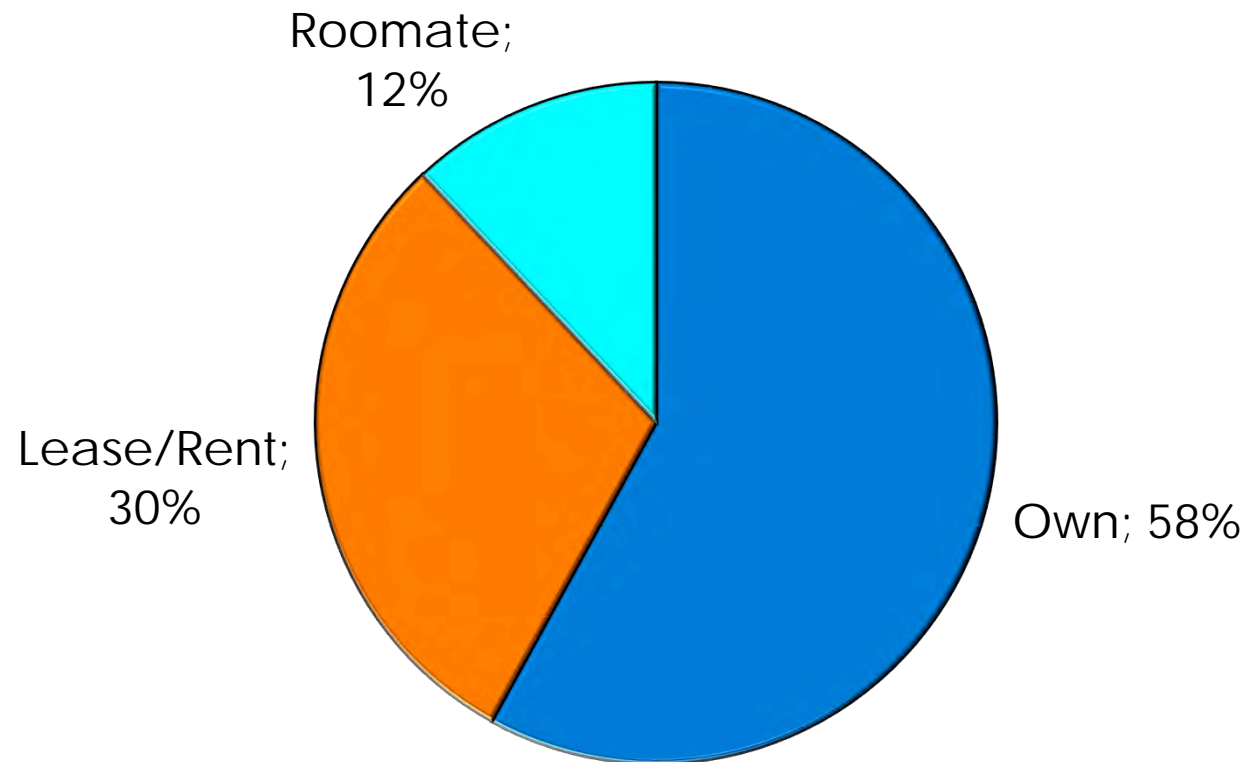
Length of Stay



Average Length of Stay Tracking



Living Accommodations

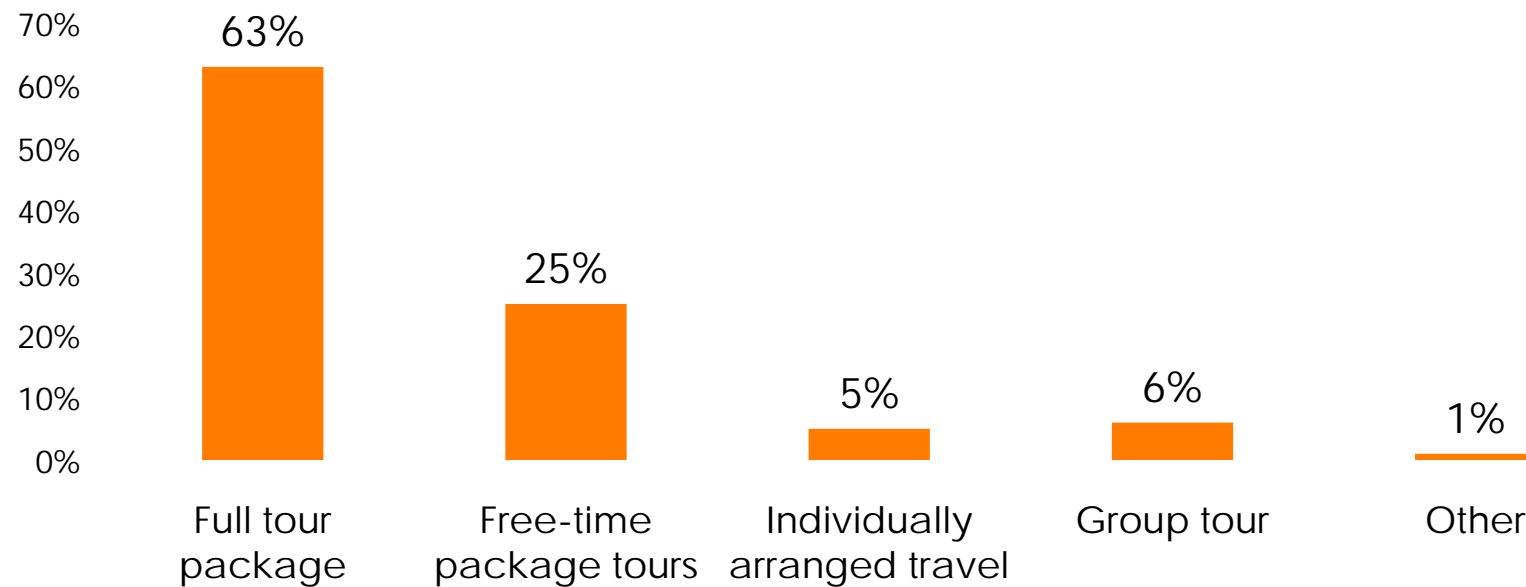


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.29	White Collar-Office	32%	22%	32%	38%	34%	
	Self-employed	15%	11%	10%	19%	17%	13%
	Prof/Specialist/Tech	11%	11%	14%	5%	17%	
	Homemaker	10%	11%	8%	13%	5%	25%
	Service worker	7%	19%	9%	3%	4%	13%
	Manager	6%	11%	5%	6%	8%	
	Professor/Teacher	5%		3%	4%	8%	13%
	Sales/Clerical	4%	4%	6%	4%	3%	
	Free-lancer	3%		5%	4%		
	Govt-Exec	2%	7%	2%		1%	
	Govt - Office/non-mgr	1%		2%	1%	1%	
	Govt-Mgr	1%	4%	2%		1%	
	Other	1%		2%		1%	
	Student	1%		1%			13%
	Unemployed	1%					25%
	Skilled worker	0%		1%			
	Farmer	0%		1%			
	Judicial	0%			1%		
Total	Count	350	27	133	93	77	8

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

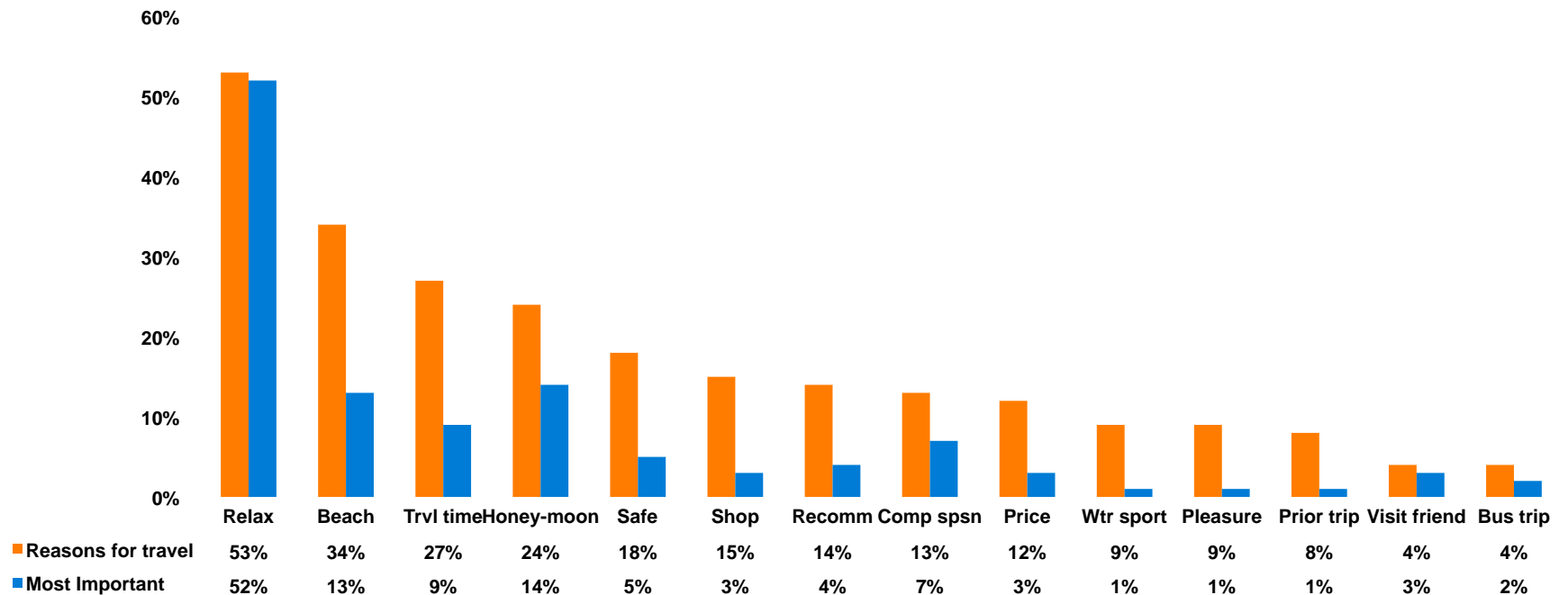


Accommodation by Income

Average length of stay: 3.90 days

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.9	Pacific Islands Club PIC	54%	52%	47%	57%	62%	50%
	Onward Beach Resort	9%	4%	12%	8%	9%	
	Hyatt Regency Guam	8%	15%	10%	5%	6%	
	Sheraton Laguna Resort	8%	7%	11%	5%	5%	13%
	The Westin Resort Guam	5%	11%	3%	7%	5%	25%
	Hilton Guam Resort & Spa	5%		8%	5%	1%	
	Relatives, Friends, Home Stay	3%		4%	2%	3%	
	Holiday Resort Guam	3%		1%	4%	3%	
	Ohana Bayview Hotel	1%		1%	3%		
	Hotel Sane Fe	1%			1%	1%	13%
	Leo Palace Resort	1%				3%	
	Outrigger Guam Resort	1%		1%	1%		
	Other	1%		1%	1%		
	Ramada Suites Guam	1%	7%				
	Guam Marriott Resort Hotel	0%		1%			
	Hotel Nikko Guam	0%	4%				
	Apartment	0%				1%	
Total	Count	351	27	135	92	77	8

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

are the three reasons mentioned most often as the most important reason for this particular trip.

Motivation by Age & Gender

	TOTAL	AGE				GENDER	
		20-29	30-39	40-49	50+	Male	Female
Q.5 Just to relax	53%	54%	54%	51%	38%	55%	51%
Beautiful seas, beaches, tropical climate	34%	43%	29%	34%	38%	26%	43%
Short travel time	27%	24%	31%	20%	25%	22%	32%
Honeymoon	24%	35%	26%	3%		26%	21%
It is a safe place to spend a vacation	18%	18%	21%	15%	13%	16%	20%
Shopping	15%	11%	18%	15%	6%	11%	18%
Recommendation of friend, relative, travel agency	14%	19%	11%	13%	6%	16%	11%
My company sponsored me	13%	8%	13%	21%	6%	11%	14%
Price of the tour package	12%	6%	13%	18%	13%	13%	11%
Water sports	9%	6%	10%	11%	19%	10%	9%
Pleasure	9%	11%	6%	8%	19%	6%	11%
A previous visit	8%	4%	5%	18%	25%	9%	7%
To visit friends or relatives	4%	5%	2%	7%	6%	2%	6%
Company or Business trip	4%	3%	2%	8%	13%	6%	1%
To golf	2%	2%	1%	5%	6%	2%	2%
SCUBA diving	2%	3%	1%	2%	6%	3%	1%
Promotional materials from GVB	2%	3%	1%	2%		2%	1%
To get married or Attend wedding	1%	1%	2%			2%	1%
Organized Sporting Activity	1%	2%	1%	2%			2%
Other	1%	1%	2%				2%
Career certification or testing	1%		2%			2%	
Special promotion	0%		1%				1%
Total Cases	352	100	175	61	16	176	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	53%	50%	49%	57%	57%	75%
Beautiful seas, beaches, tropical climate	34%	35%	28%	43%	34%	50%
Short travel time	27%	23%	22%	32%	27%	25%
Honeymoon	24%	42%	35%	17%	6%	13%
It is a safe place to spend a vacation	18%	23%	18%	26%	12%	13%
Shopping	15%	4%	12%	20%	17%	25%
Recommendation of friend, relative, travel agency	14%	12%	15%	12%	13%	25%
My company sponsored me	13%	12%	18%	8%	8%	13%
Price of the tour package	12%	15%	10%	10%	17%	13%
Water sports	9%	8%	6%	16%	9%	
Pleasure	9%	4%	9%	9%	5%	25%
A previous visit	8%	8%	4%	13%	9%	
To visit friends or relatives	4%	8%	4%	3%	3%	
Company or Business trip	4%	4%	3%	5%	3%	13%
To golf	2%		2%		6%	
SCUBA diving	2%	4%	2%	1%	1%	13%
Promotional materials from GVB	2%	4%	1%	2%		
To get married or Attend wedding	1%		2%	2%		
Organized Sporting Activity	1%		1%	2%	1%	
Other	1%		1%	2%	1%	
Career certification or testing	1%	4%		1%	1%	
Special promotion	0%					
Total Cases	352	26	136	93	77	8

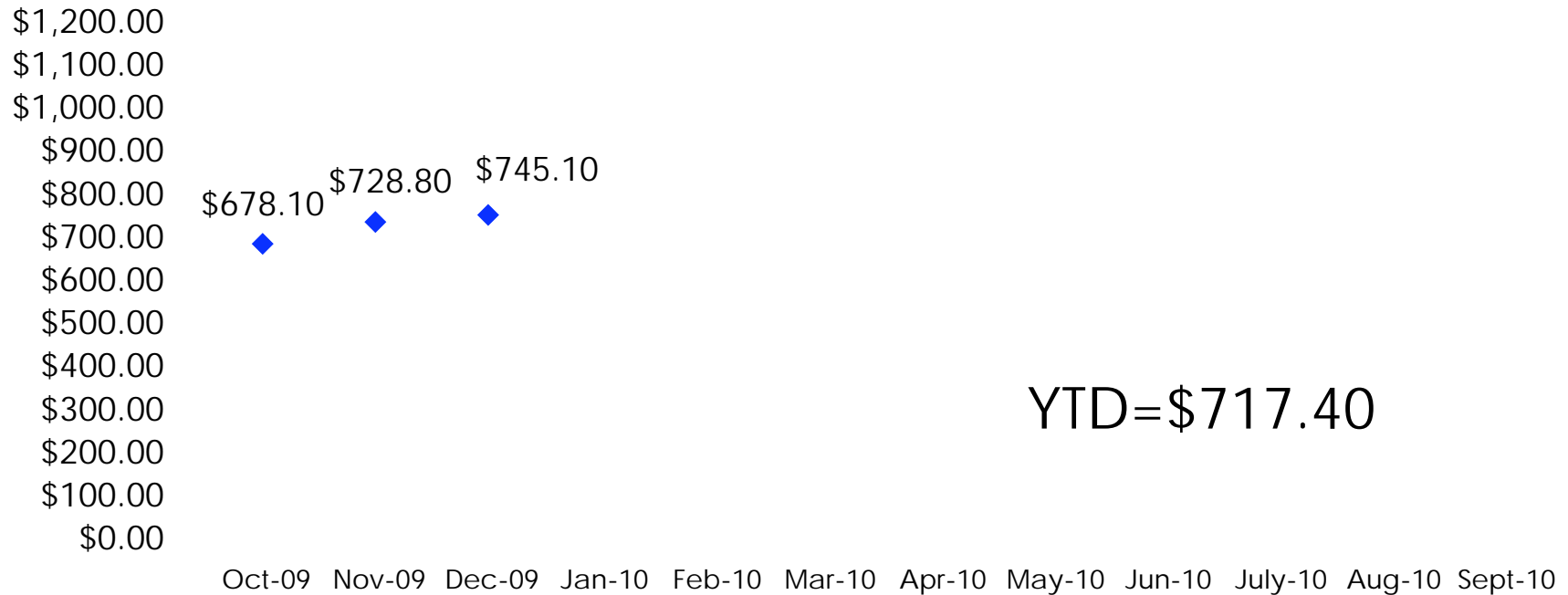
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1163.26/US\$1

- \$1,590.00 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$8,596 = maximum (highest amount recorded for the entire sample)
- \$745.10 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

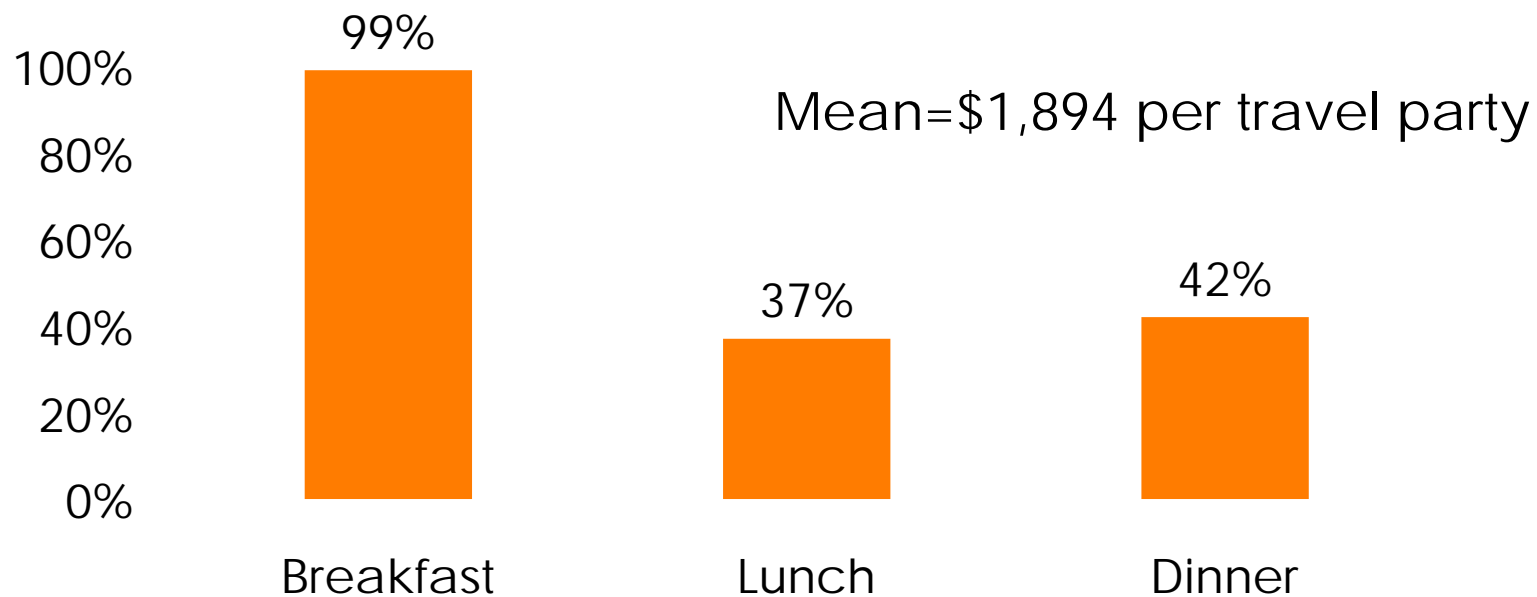
KW1163.26=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,203
Air & Accommodation w/ daily meal package	\$1,894
Air only	\$576
Accommodation only	\$409
Accommodation w/ daily meal only	\$1,246
Food & Beverages in Hotel	\$195
Ground transportation – Korea	\$70
Ground transportation – Guam	\$85
Optional tours/ activities	\$246
Other expenses	\$534
Total Prepaid	\$1,590

Prepaid Meal Breakdown

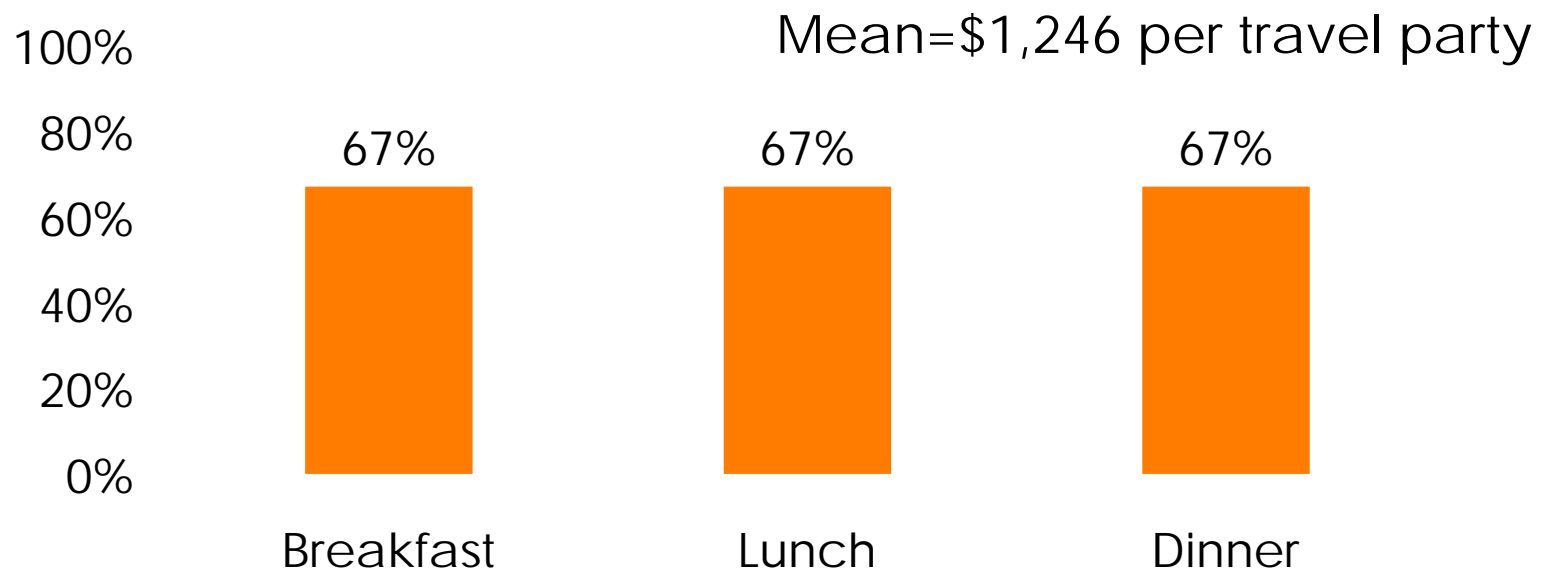
Air/ Accommodations with Daily Meal Package n=191



Prepaid Meal Breakdown

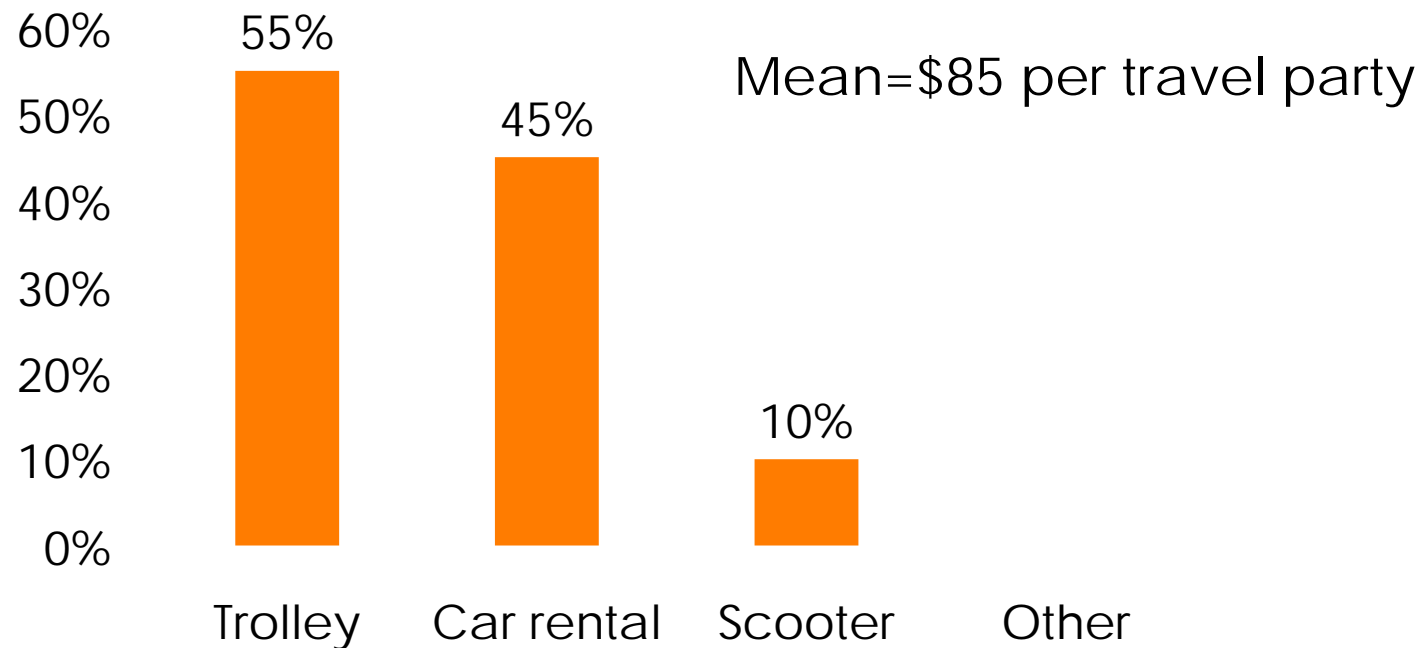
Accommodations with Daily Meal Pkg.

n=3



Prepaid Ground Transportation

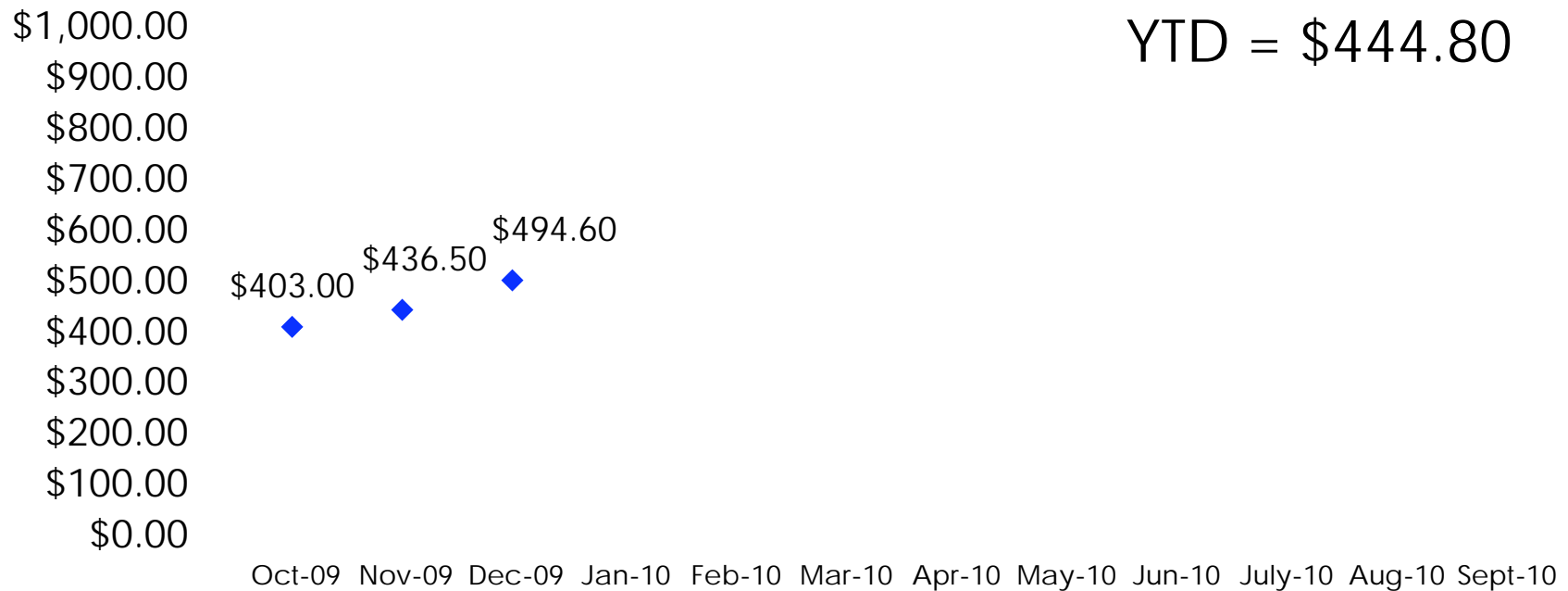
n=20



On-Island Expenditures

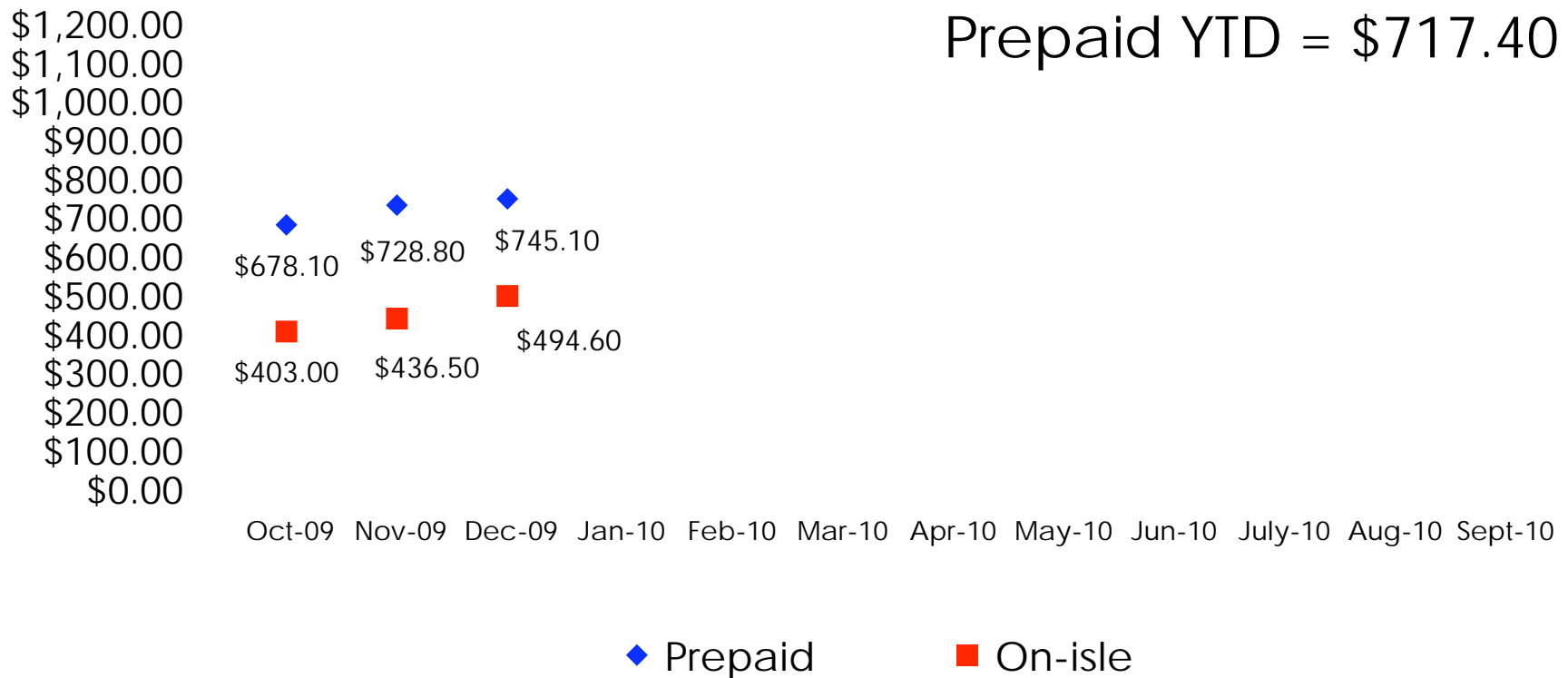
- \$917.20 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$30,000 = Maximum (highest amount recorded for the entire sample)
- \$494.60 = overall mean average per person on-island expenditure

On-island Expenditures



Prepaid/On-Island Expenditures

On-Island YTD = \$444.80
 Prepaid YTD = \$717.40



Total On-Island Expenditure by Gender & Age

	TOTAL	GENDER		GENDER							
		Male	Female	Male				Female			
				AGE				AGE			
				20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A Mean	\$917.18	\$991.32	\$842.61	\$957.94	\$843.99	\$1,497.14	\$798.75	\$769.17	\$710.58	\$1,369.67	\$1,240.00
Median	\$550	\$600	\$501	\$650	\$600	\$500	\$560	\$445	\$522	\$648	\$430

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$74.21	\$123.74	\$24.40	\$52.09	\$24.58	\$264.05	\$32.94
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$28.23	\$36.05	\$20.36	\$38.23	\$21.99	\$32.88	\$15.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$49.28	\$62.69	\$35.80	\$30.03	\$40.15	\$112.52	\$29.63
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$104.84	\$103.18	\$106.52	\$109.33	\$103.59	\$90.49	\$145.00
	Median	\$0	\$0	\$0	\$75	\$0	\$0	\$90
GIFT/ SOUV-SELF	Mean	\$189.09	\$189.97	\$188.21	\$187.63	\$200.14	\$153.59	\$212.75
	Median	\$0	\$0	\$20	\$20	\$0	\$20	\$22
GIFT/SOUV- F&F AT HOME	Mean	\$146.42	\$182.50	\$110.14	\$104.46	\$135.10	\$263.03	\$90.63
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$27.80	\$23.19	\$32.44	\$19.98	\$24.86	\$37.49	\$72.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$290.40	\$258.85	\$322.13	\$284.43	\$233.73	\$457.70	\$310.13
	Median	\$30	\$45	\$30	\$30	\$30	\$60	\$80
TOTAL ON ISLAND	Mean	\$917.18	\$991.32	\$842.61	\$830.85	\$784.53	\$1,442.81	\$909.05
	Median	\$550	\$600	\$501	\$500	\$600	\$590	\$560

On-Island Expenditures

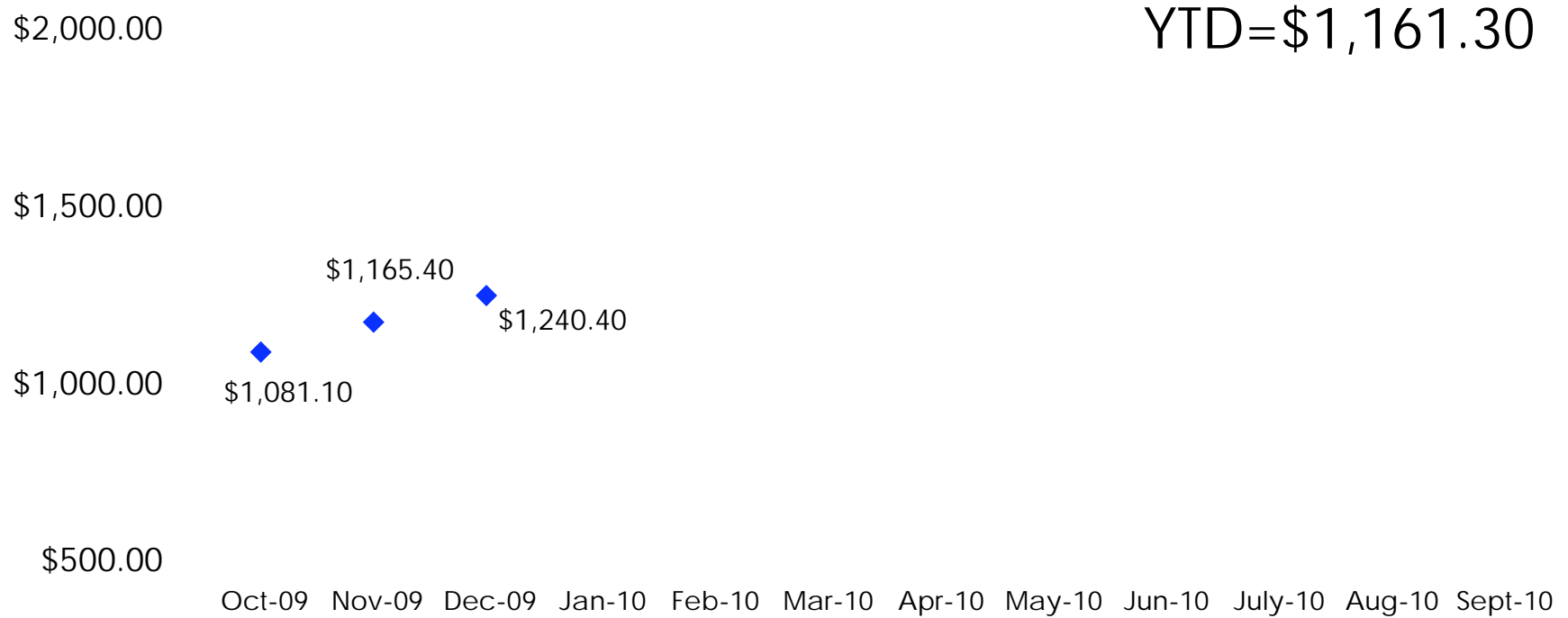
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$31.36	\$260.56
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$20.32	\$62.59
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$32.73	\$121.29
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$110.51	\$80.23
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$194.89	\$163.85
	Median	\$0	\$0
GIFT/SOUV- F&F AT HOME	Mean	\$119.67	\$262.74
	Median	\$0	\$0
LOCAL TRANS	Mean	\$19.49	\$63.94
	Median	\$0	\$0
OTHER EXP	Mean	\$272.42	\$368.61
	Median	\$30	\$60
TOTAL ON ISLAND	Mean	\$806.46	\$1,398.64
	Median	\$501	\$700

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,240.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$33,868 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

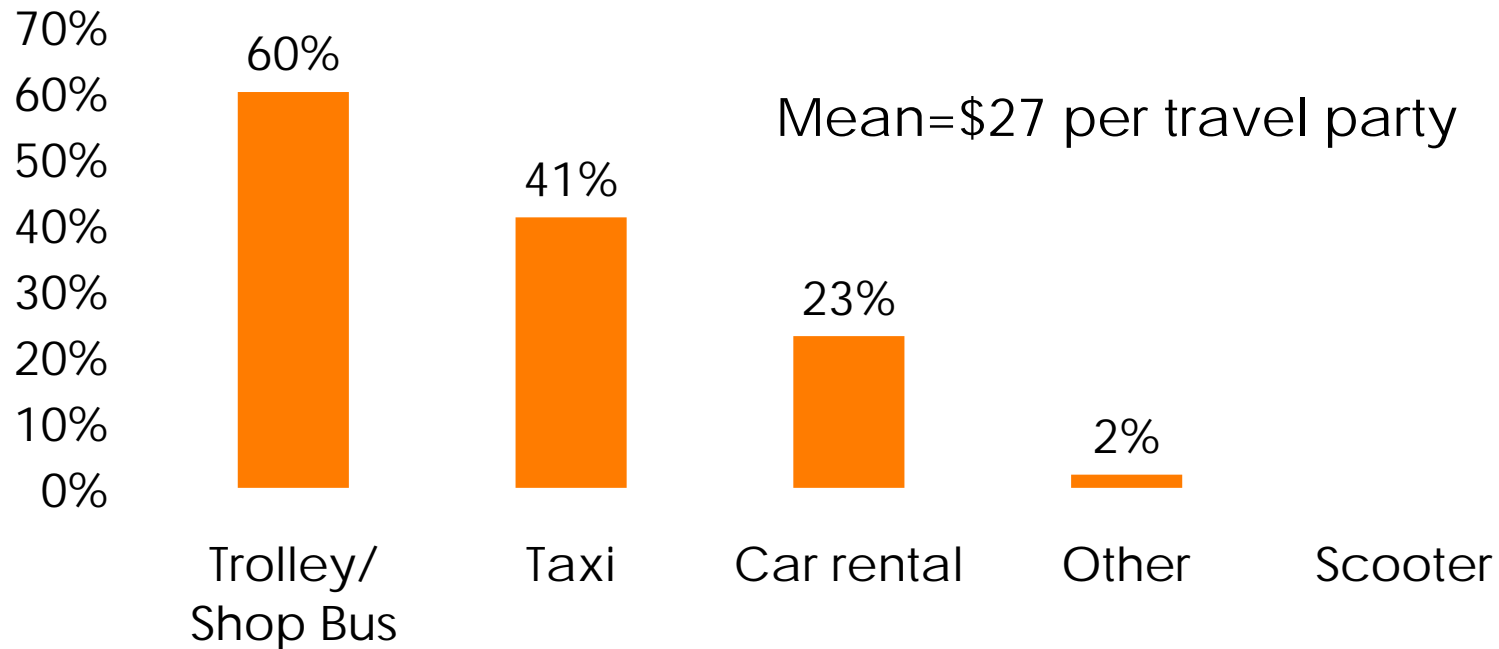


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$74.20
Food & beverage in fast food restaurant/ convenience store	\$28.20
Food & beverage at restaurants or drinking establishments outside a hotel	\$49.30
Optional tours and activities	\$104.80
Gifts/ souvenirs for yourself/companions	\$189.10
Gifts/ souvenirs for friends/family at home	\$146.40
Local transportation	\$27.80
Other expenses not covered	\$290.40
Average Total	\$917.20

Local Transportation

n=122



Guam Airport Expenditures

- \$60.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

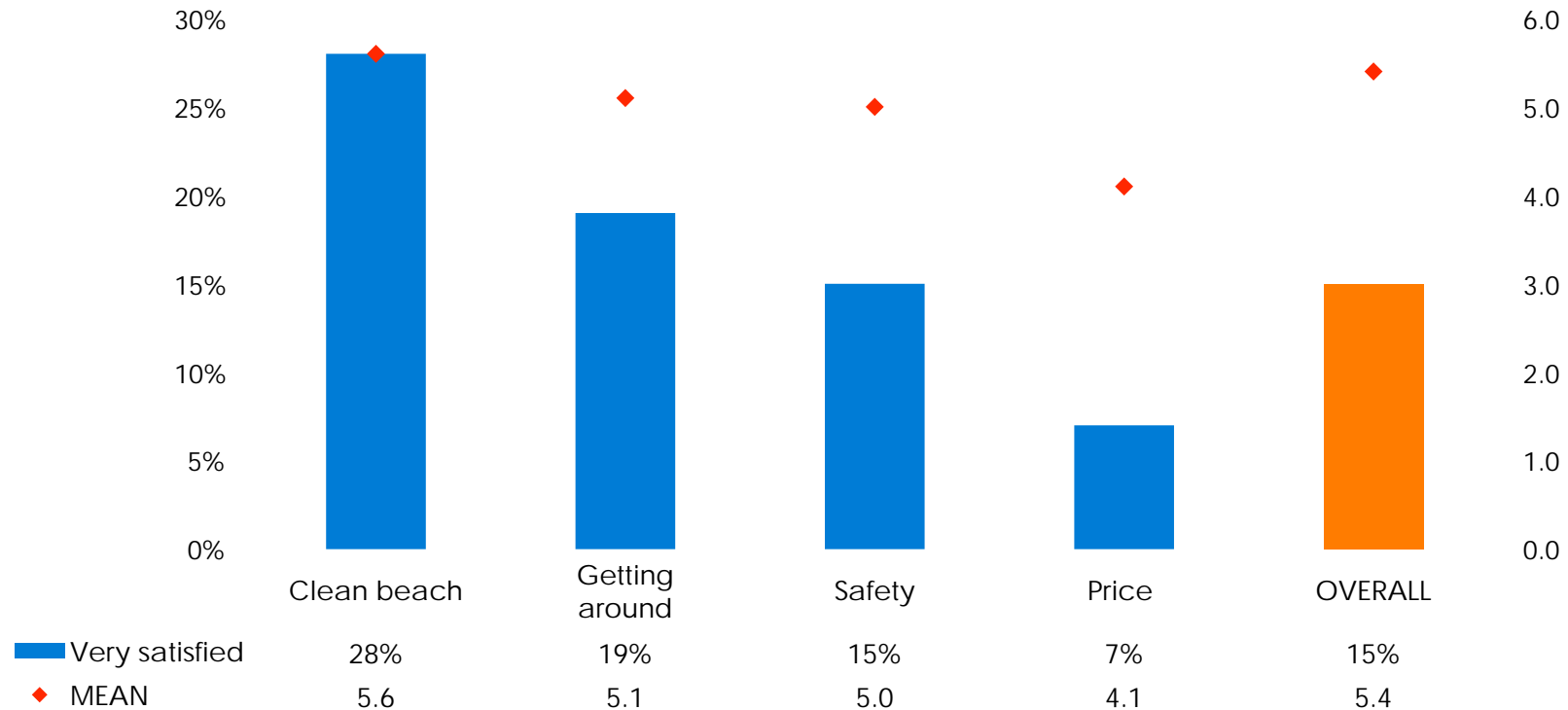
	MEAN \$
Food & Beverages	\$5.40
Gifts/Souvenirs Self	\$38.50
Gifts/Souvenirs Others	\$17.00
Total	\$60.70

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Guam Perceptions

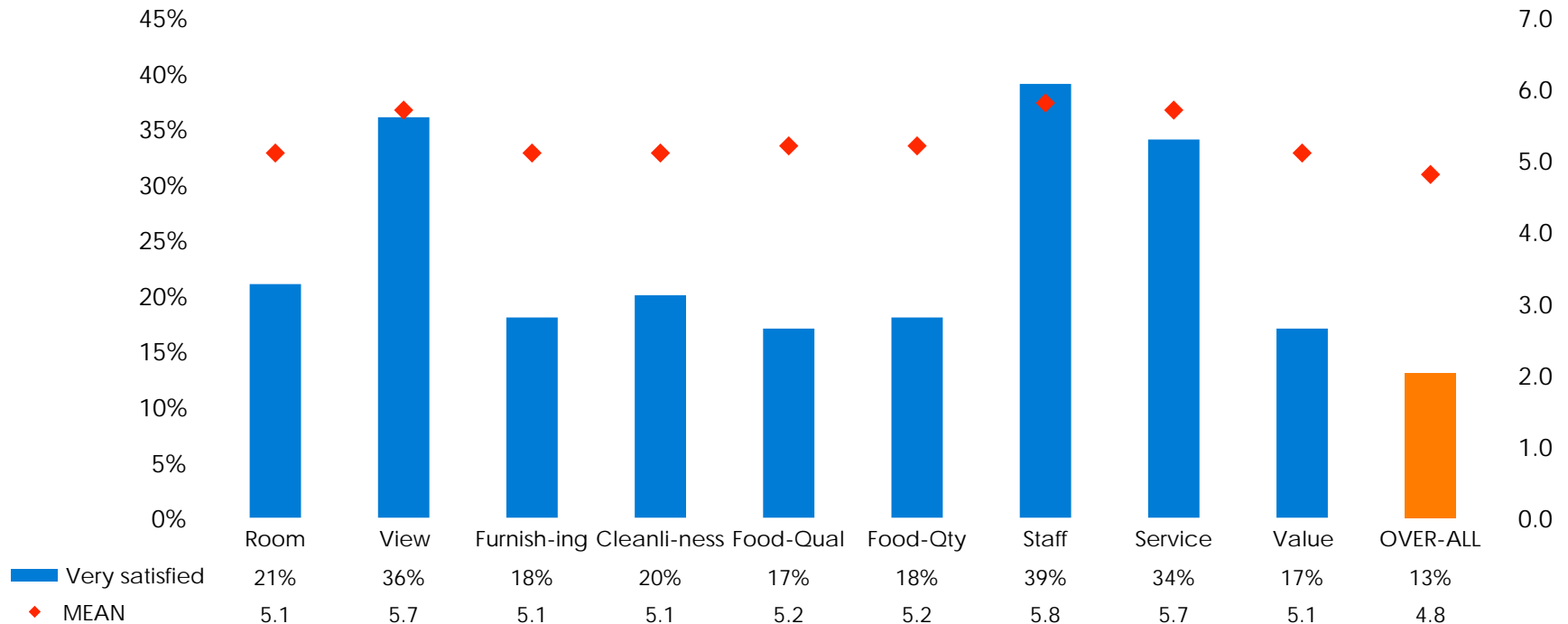


◆ Clean beach/park	5.5	5.7	5.6
■ Ease getting around	4.8	5.0	5.1
■ Safe walk night	4.8	4.9	5.0
▲ Price	4.1	4.1	4.1
■ Overall	5.4	5.4	5.4

Quality of Accommodations

7pt Rating Scale

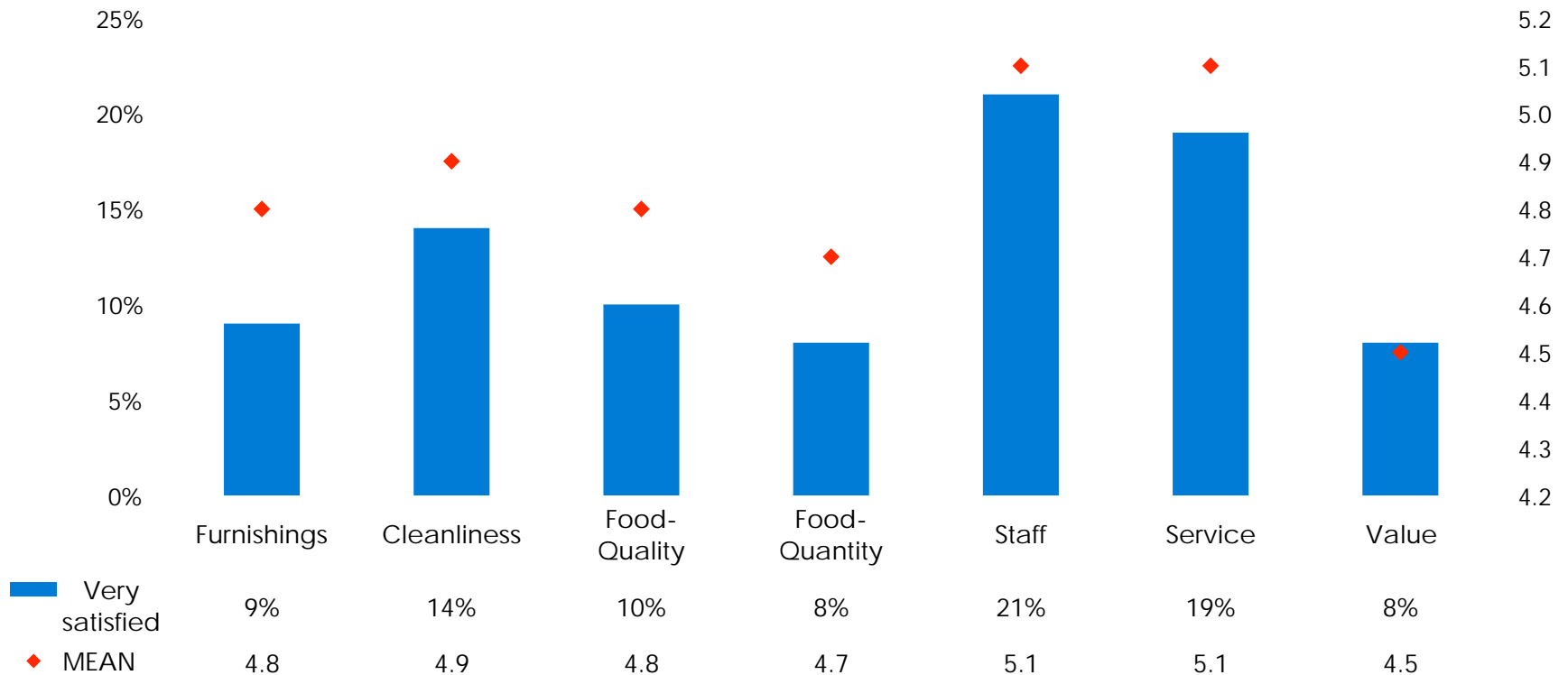
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

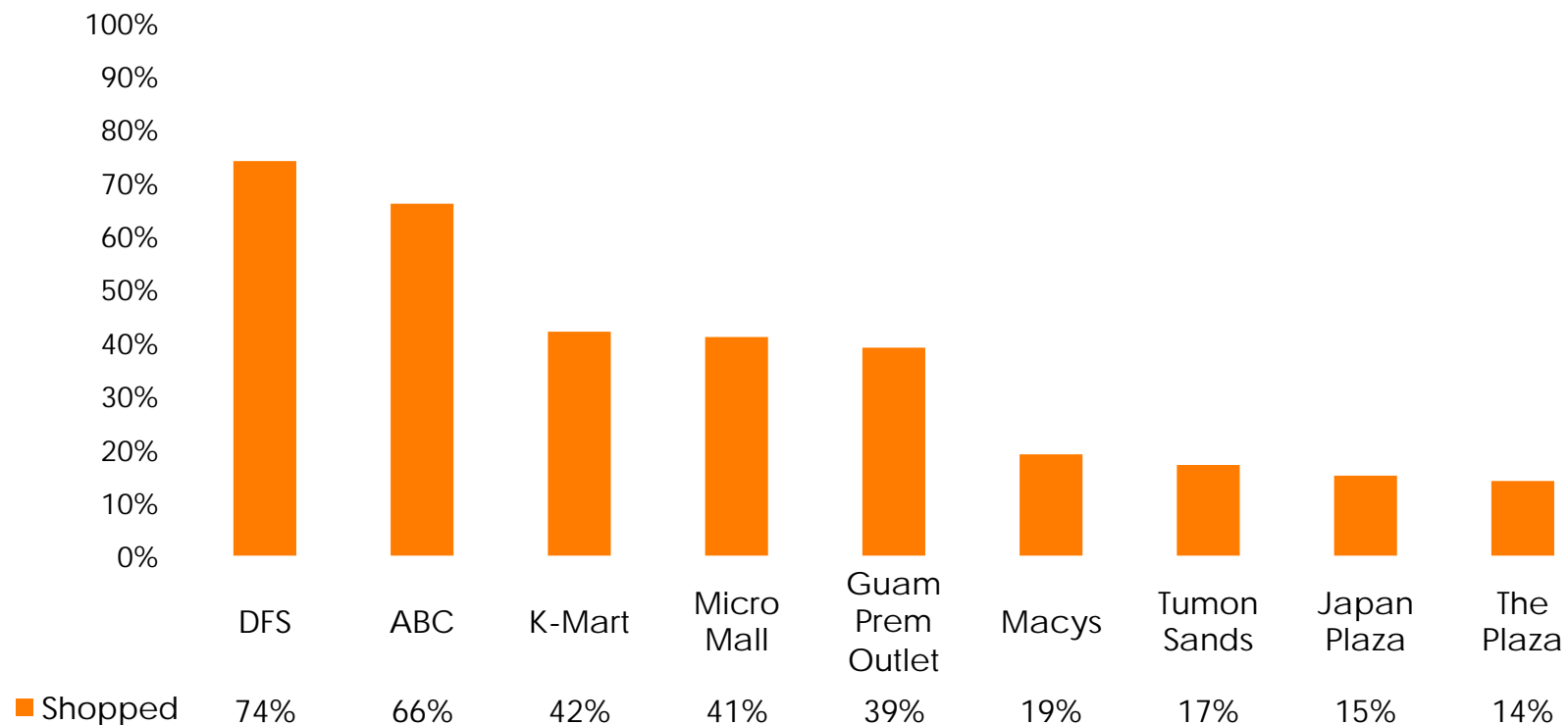
7pt Rating Scale

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

r

Quality of Shopping

Variety of Shopping

Score of 6 to 7 = 38%

Score of 6 to 7 = 34%

Score of 4 to 5 = 49%

Score of 4 to 5 = 46%

Score 1 to 3 = 12%

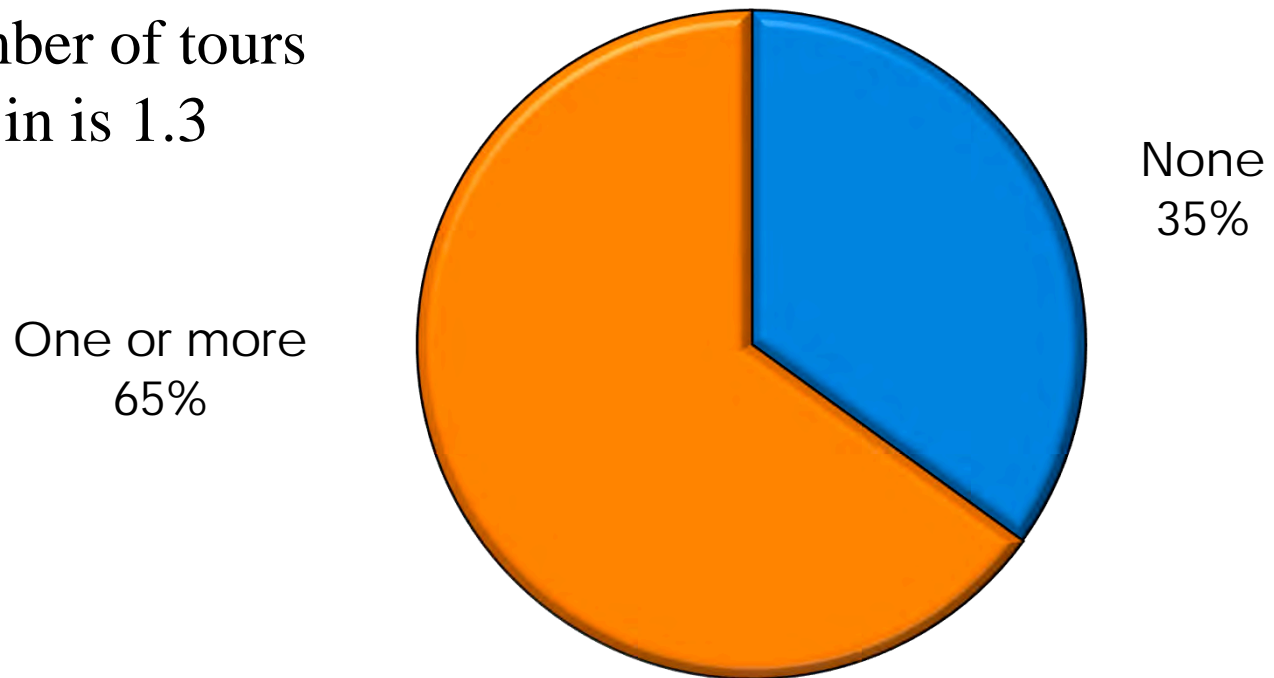
Score 1 to 3 = 20%

MEAN = 4.9

MEAN = 4.7

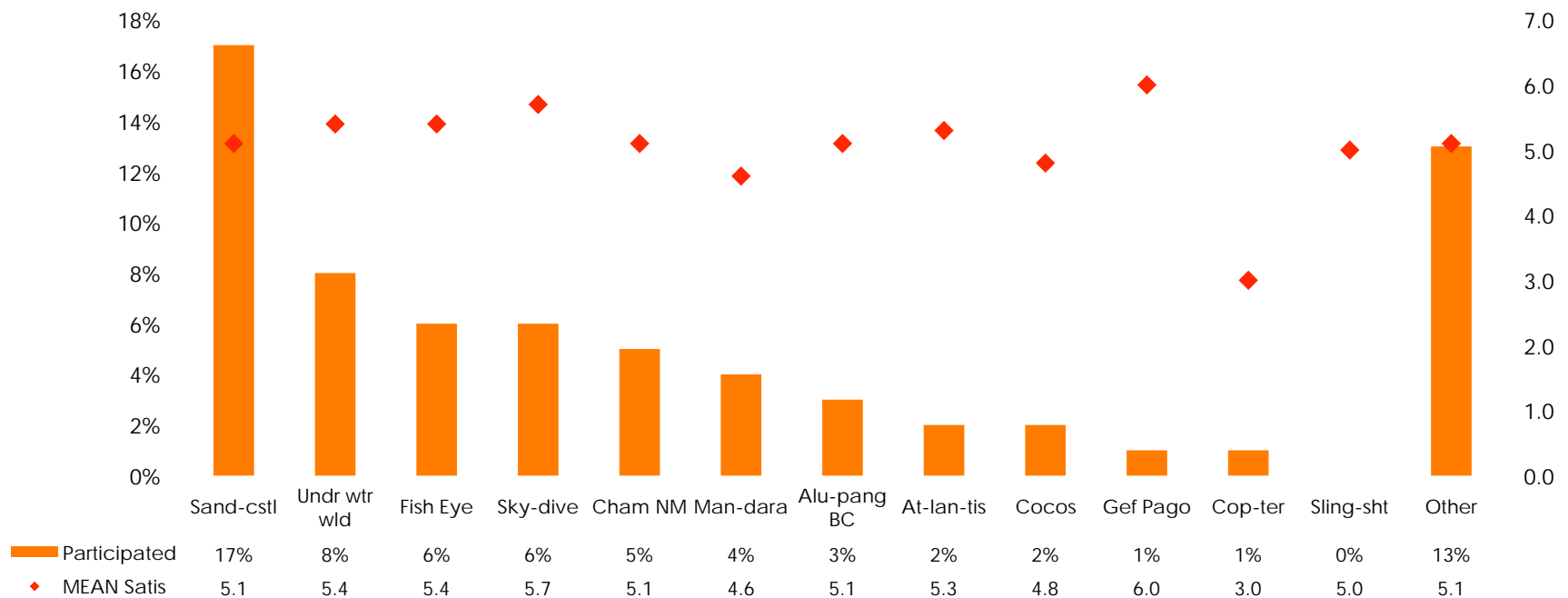
Optional Tour Participation

- Average number of tours participated in is 1.3



Optional Tours

Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

r

Quality of Day Tour

Score of 6 to 7 = 35%

Score of 4 to 5 = 56%

Score 1 to 3 = 9%

MEAN = 4.9

Variety of Day Tour

Score of 6 to 7 = 26%

Score of 4 to 5 = 60%

Score 1 to 3 = 13%

MEAN = 4.6

Night Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

r

Quality of Night Tour

Score of 6 to 7 = 21%

Score of 4 to 5 = 59%

Score 1 to 3 = 20%

MEAN = 4.3

Variety of Night Tour

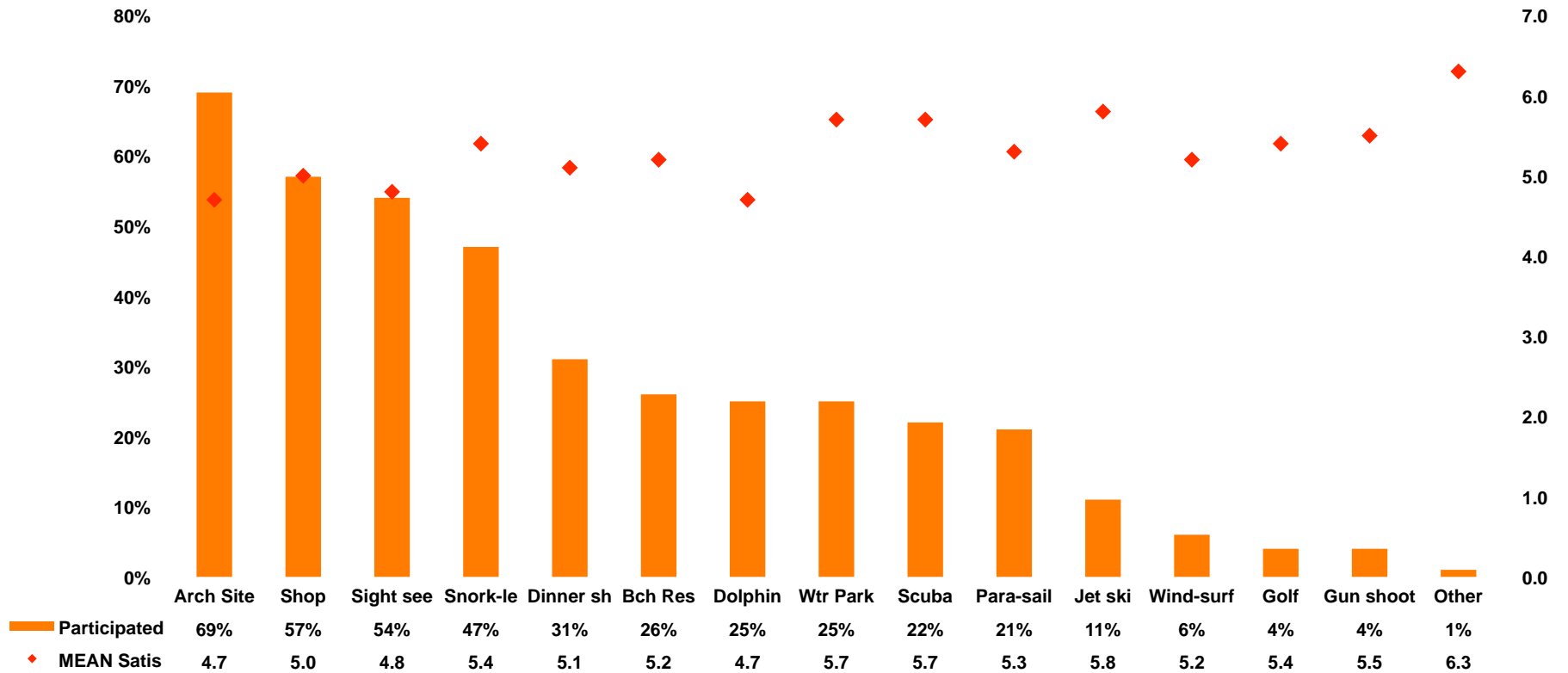
Score of 6 to 7 = 19%

Score of 4 to 5 = 58%

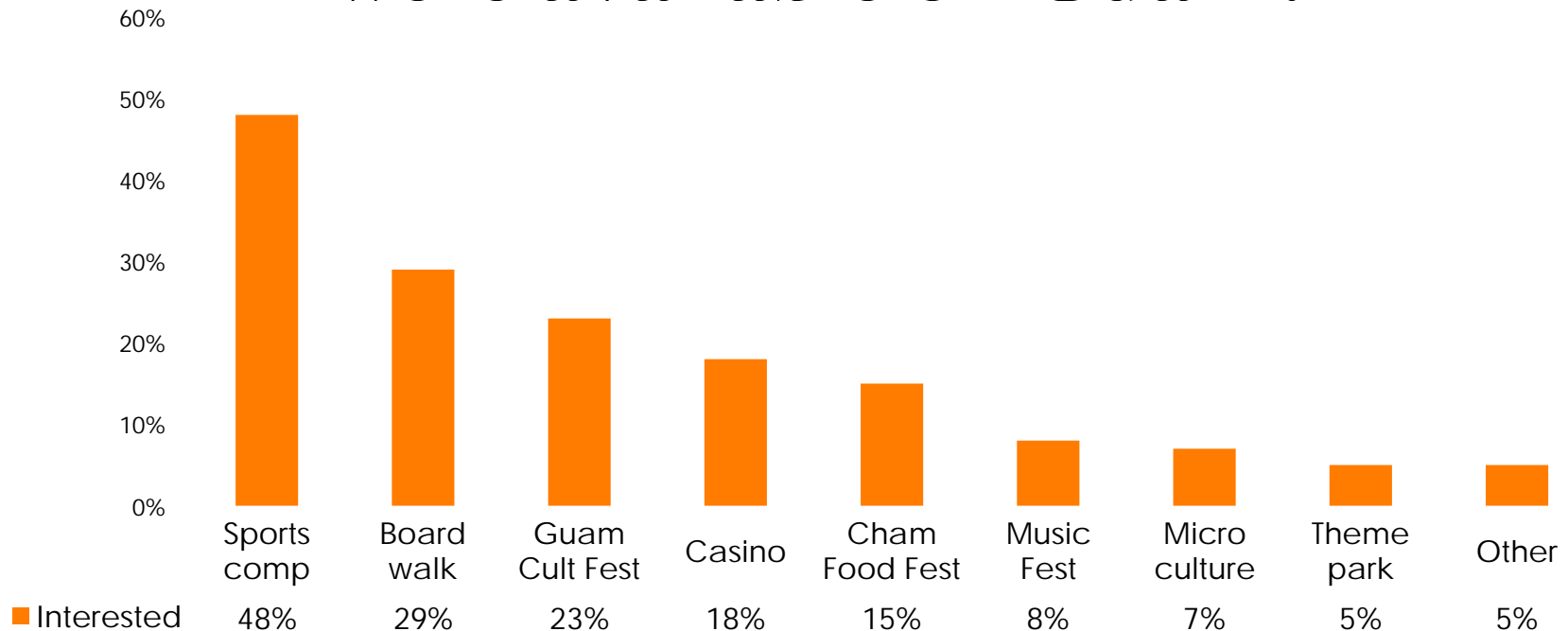
Score 1 to 3 = 24%

MEAN = 4.1

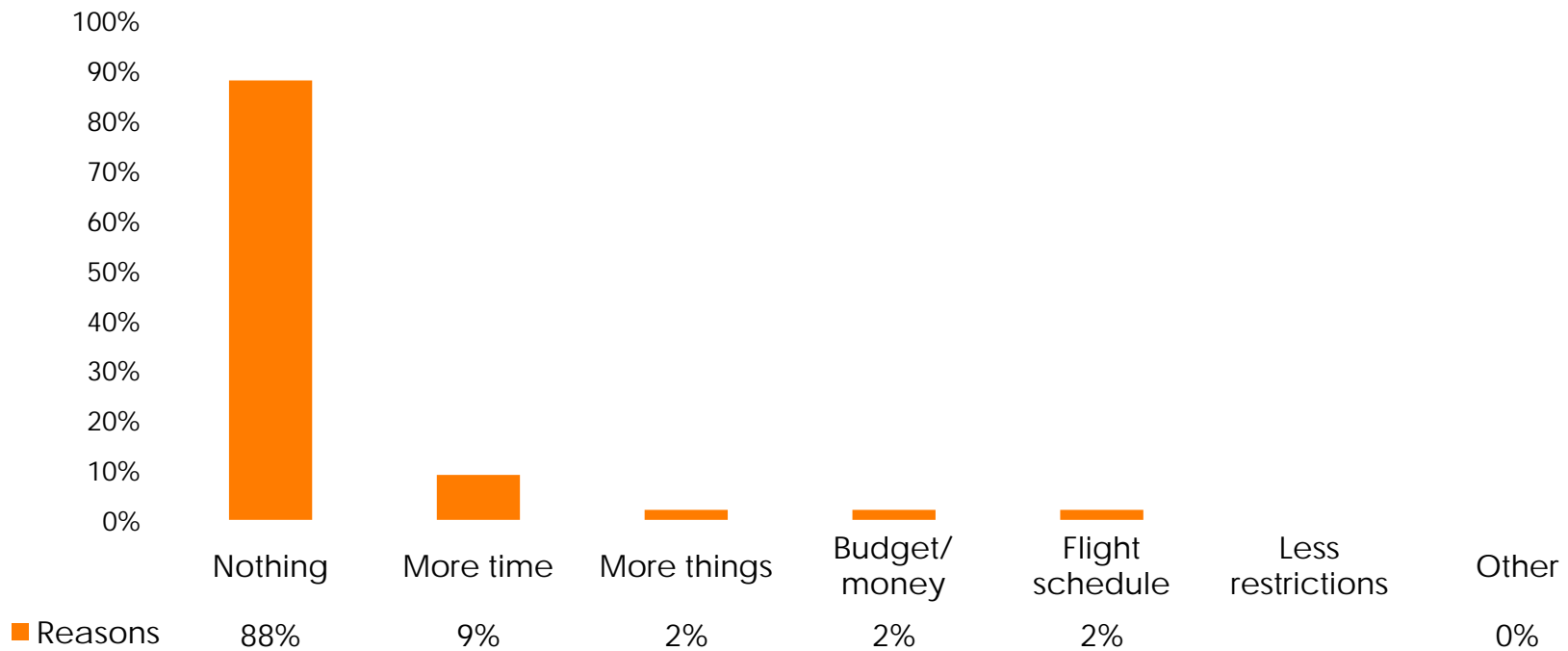
Satisfaction with Other Activities



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



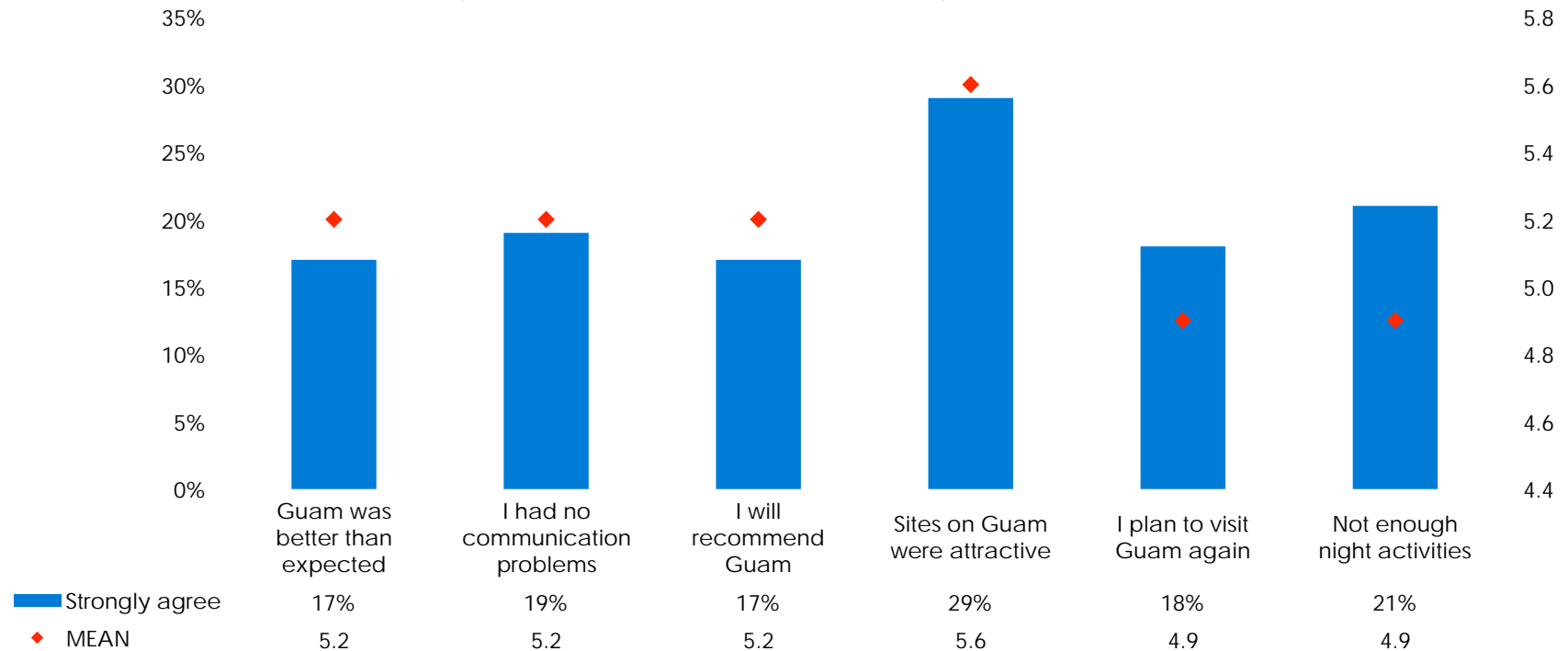
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

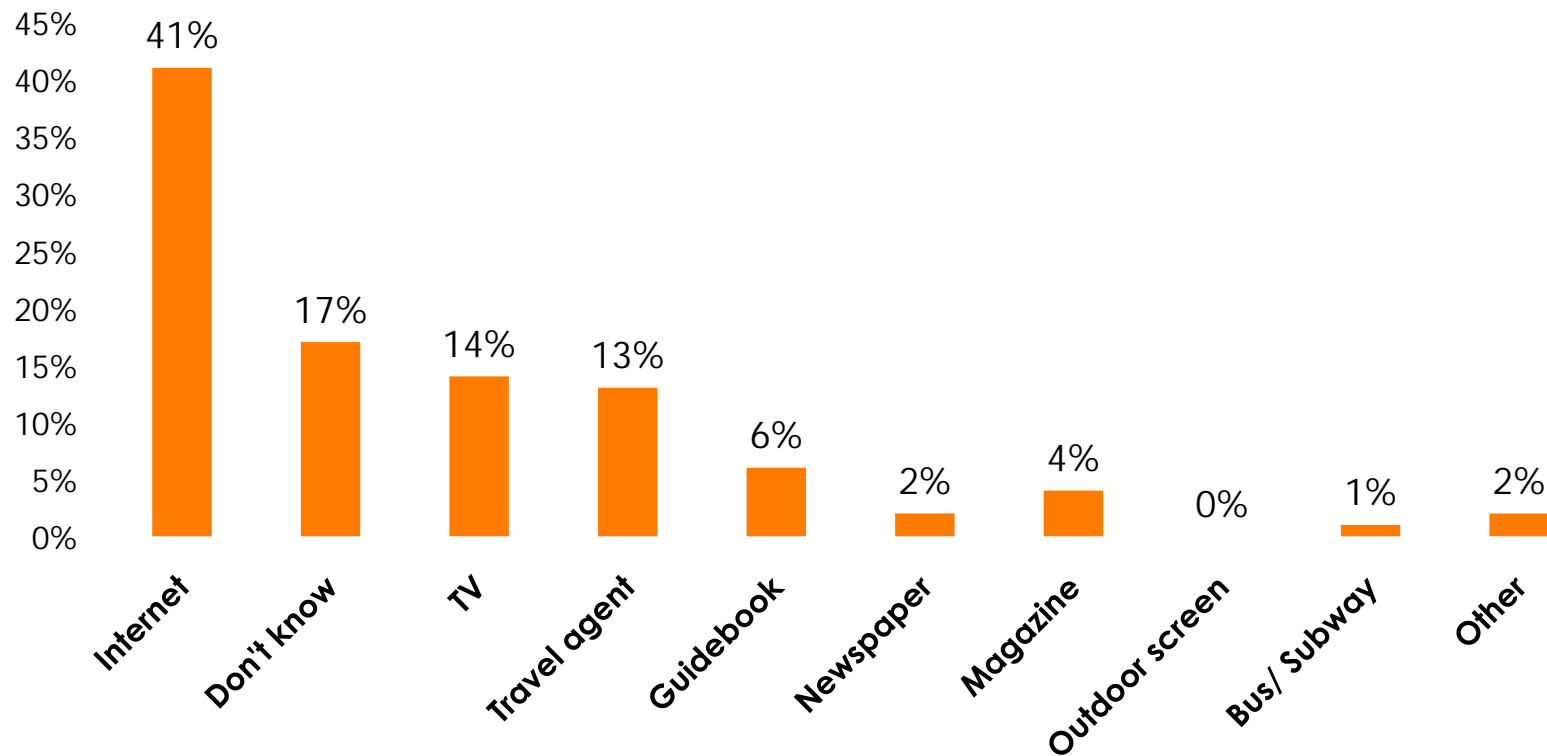
7=Very Satisfied/ 1=Very Dissatisfied



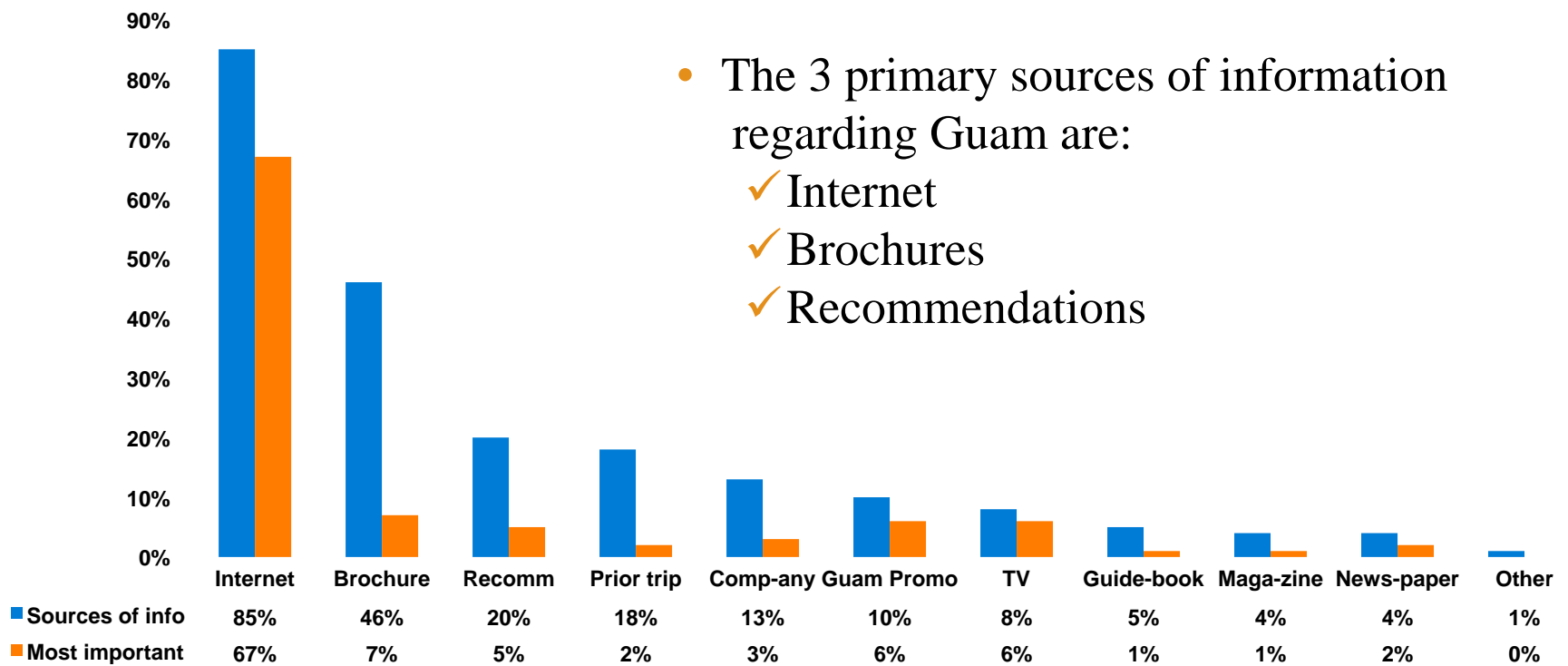
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

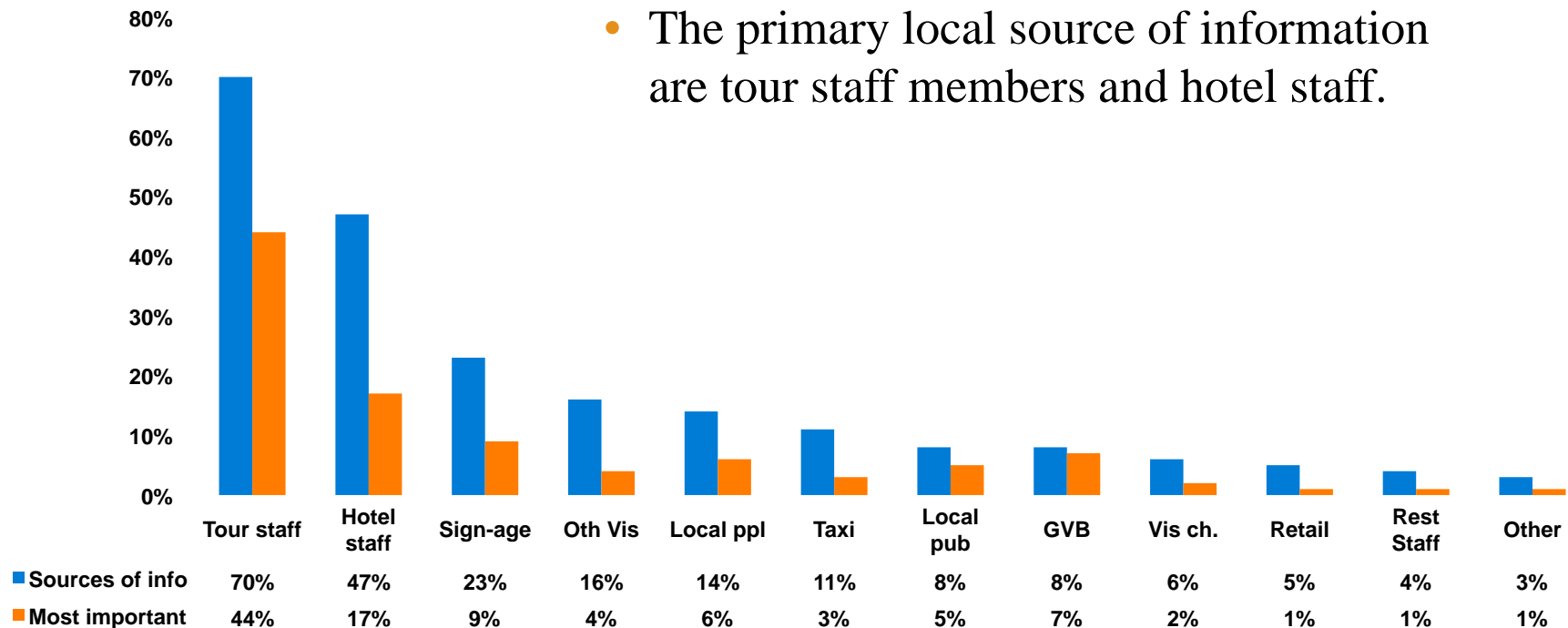


Sources of Information Pre-arrival



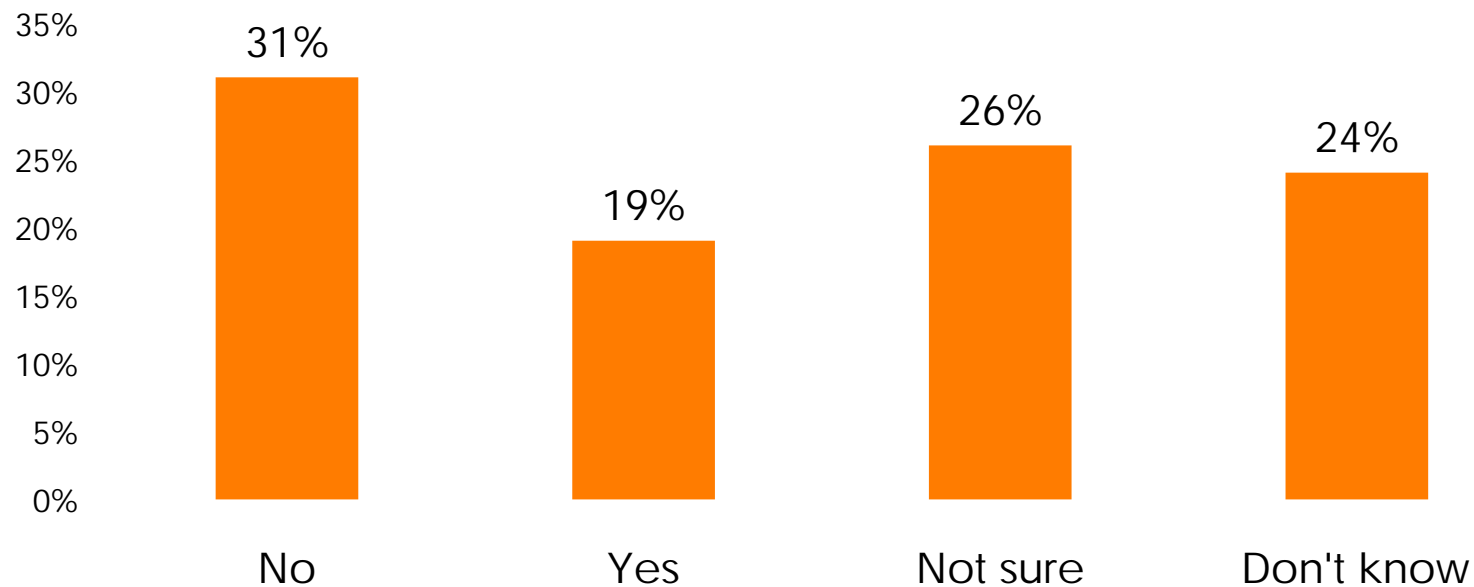
Sources of Information Post-arrival

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



SECTION 6
OTHER ISSUES

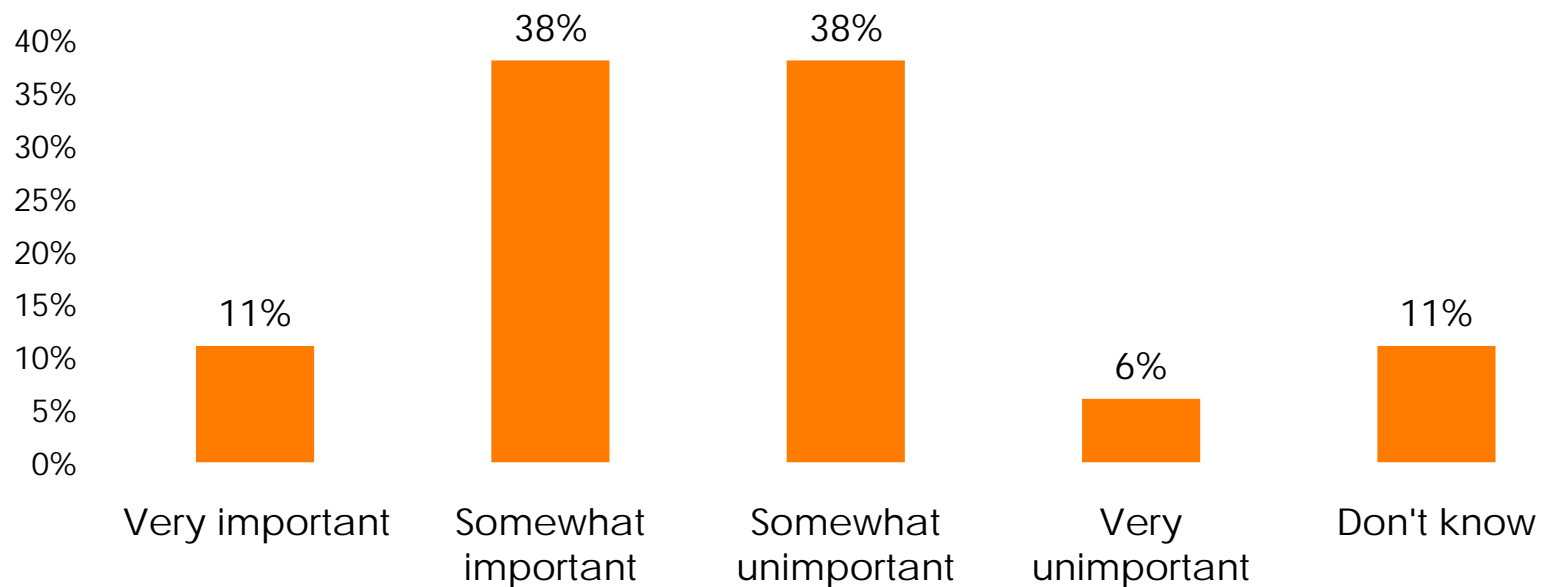
Good time to spend money on travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No	37%	30%	25%	38%	41%	36%	29%	25%	
	Yes	16%	19%	21%	25%	15%	19%	17%	26%	13%
	Not sure	16%	30%	33%	13%	15%	20%	31%	32%	2.5%
	Do not know	32%	20%	21%	25%	30%	25%	23%	17%	6.3%
Total	Count	101	175	61	16	27	136	93	77	8

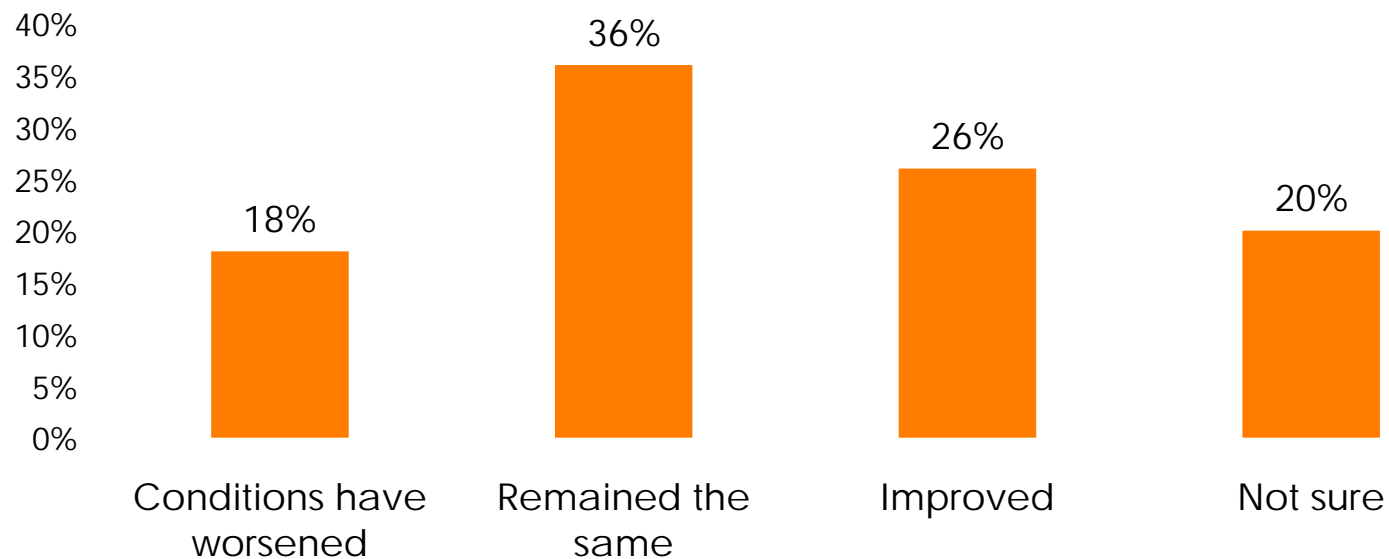
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				Refused
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.23	Very unimportant	6%	6%	3%	19%	7%	7%	6%	5%	
	Somewhat unimportant	30%	42%	43%	25%	30%	32%	38%	52%	38%
	Somewhat important	36%	39%	42%	25%	33%	36%	47%	34%	13%
	Very important	7%	6%	8%	6%	7%	9%	5%	5%	
	Don't know	22%	7%	3%	25%	22%	16%	3%	4%	50%
Total	Count	101	175	60	16	27	135	93	77	8

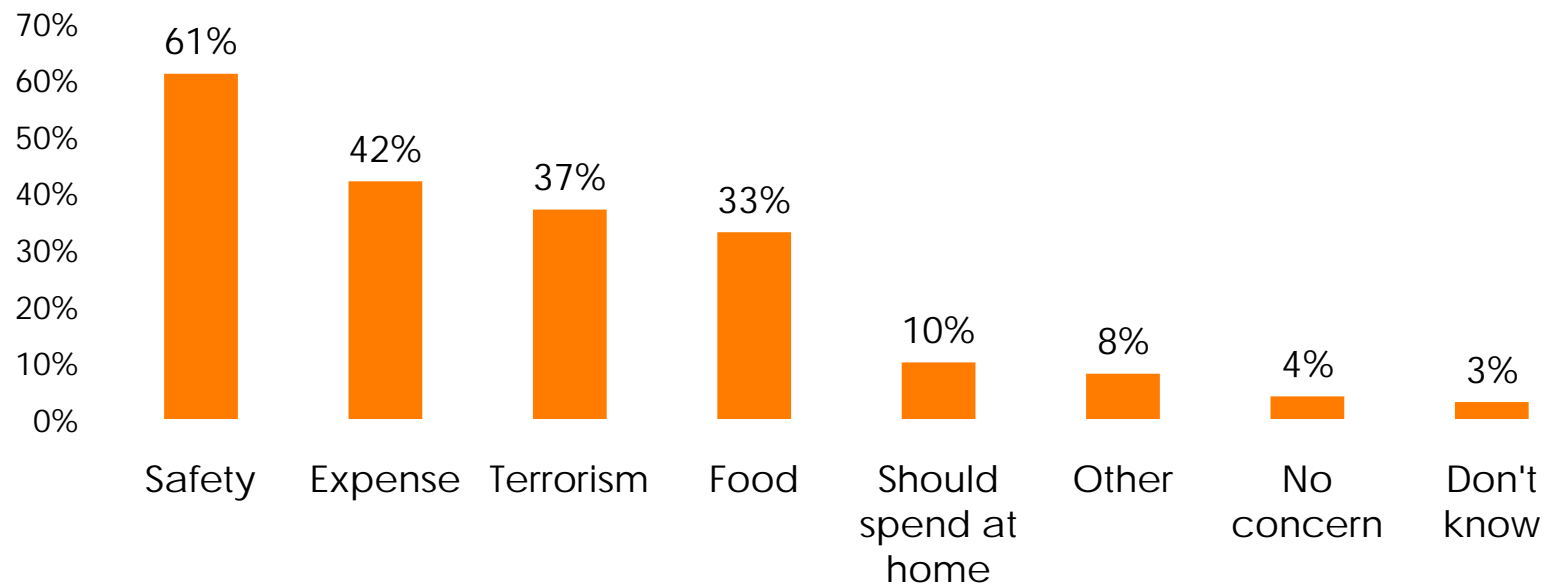
Rating Korean Economy Compared to 12 months ago



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

		AGE				PERSONAL INCOME				
		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	25%	17%	11%	19%	15%	20%	18%	16%	
	Conditions have remained the same	26%	39%	48%	25%	19%	32%	47%	38%	38%
	Conditions have improved	19%	31%	23%	31%	33%	24%	23%	35%	13%
	Do not know	31%	14%	18%	25%	33%	25%	12%	12%	50%
Total	Count	101	175	61	16	27	136	93	77	8

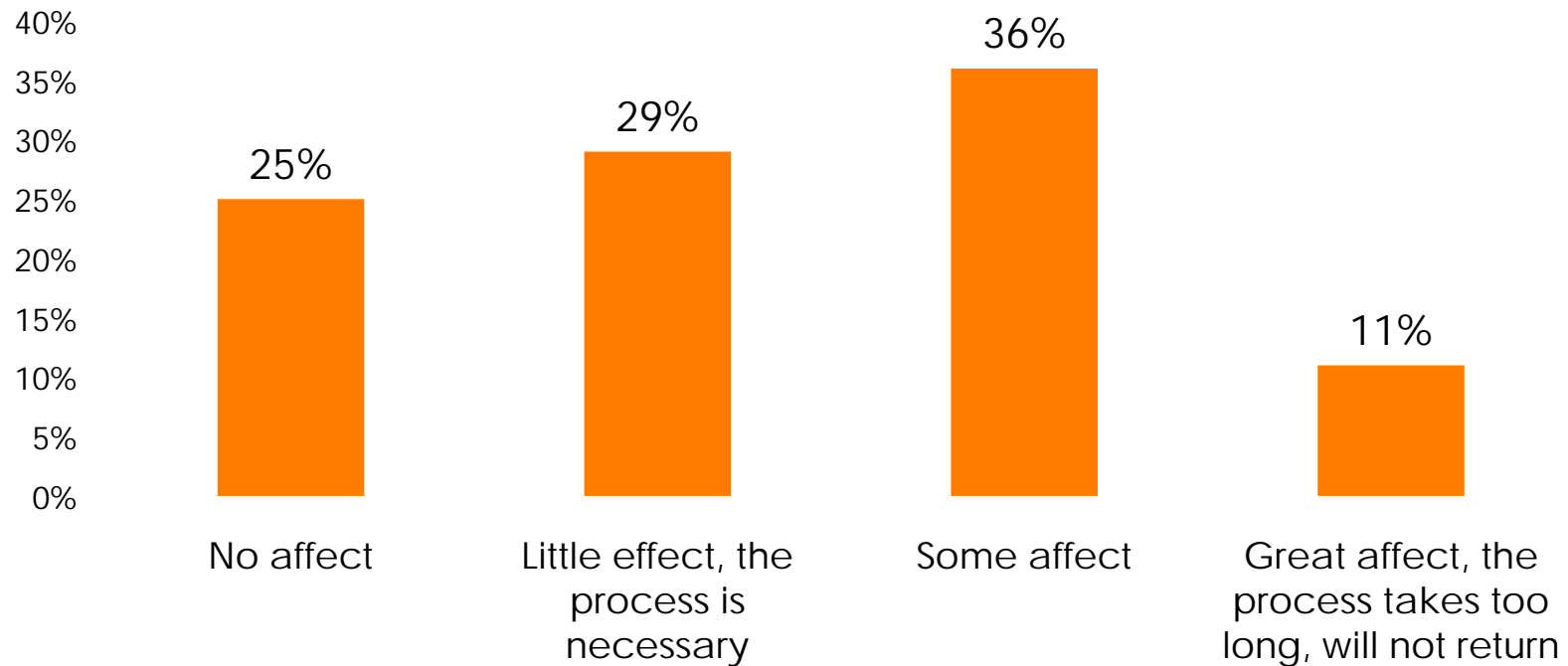
Concerns about travel outside of Korea - Overall



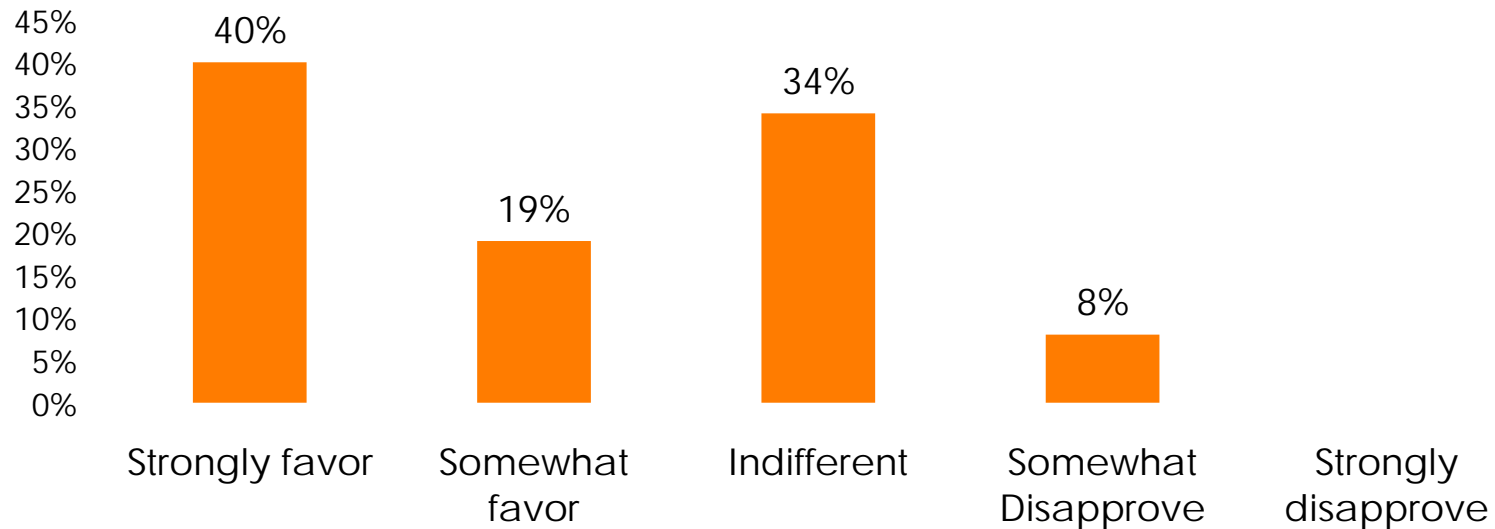
Concerns about travel outside of Korea - By Age & Income

		AGE				PERSONAL INCOME				Refused
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.24	Safety at my destination	61%	62%	64%	50%	67%	56%	68%	64%	38%
	Expense	47%	41%	43%	25%	26%	52%	43%	34%	13%
	Terrorism	38%	35%	41%	25%	30%	31%	35%	48%	38%
	Food	31%	35%	34%	25%	26%	40%	30%	27%	25%
	Spending money abroad when it should be spent at home	17%	8%	3%	13%	7%	15%	8%	5%	13%
	Other	10%	9%	5%	6%	7%	7%	5%	13%	13%
	No concerns	3%	3%	7%	13%	4%	1%	8%	6%	13%
	Do not know	2%	3%	2%		4%	3%	2%	1%	13%
Total	Cases	101	175	61	16	27	136	93	77	8

Security Screening/ Immigration Process at Guam International Airport



Increase Drinking Age to 21



Increase Drinking Age to 21 by Gender & Age

		AGE				GENDER	
		20-29	30-39	40-49	50+	Male	Female
Q.28	Strongly Favor	47%	36%	40%	44%	43%	37%
	Somewhat favor	13%	20%	23%	25%	15%	22%
	Indifferent	35%	36%	27%	31%	34%	34%
	Somewhat disapprove	6%	9%	10%		9%	7%
Total	Count	101	173	60	16	176	174

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) – 12%
- Neutral (Score 4-5) – 40%
- Disagree (Score 1-3) – 49%

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

