



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

DECEMBER 2010



Prepared by: QMark Research

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Background & Methodology

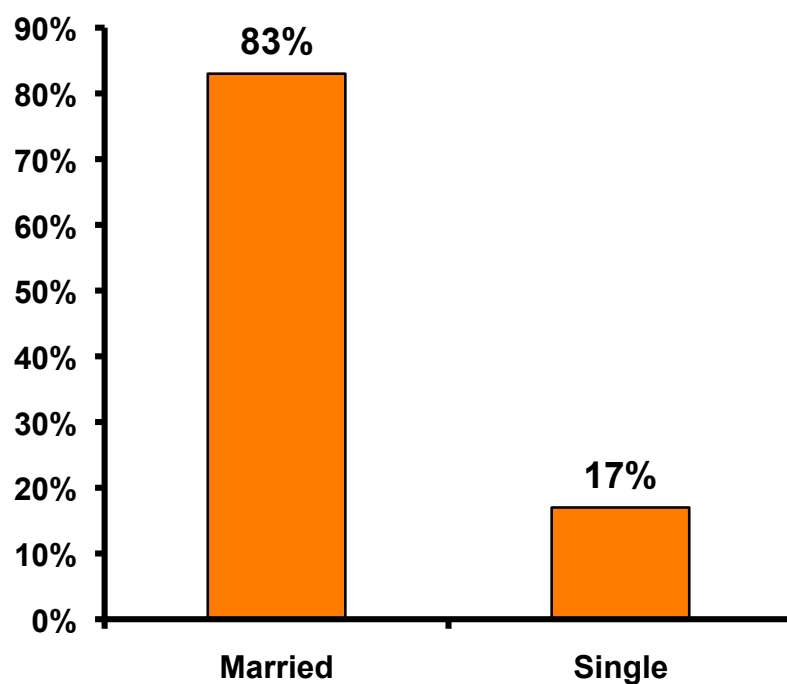
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **354** departing Korean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

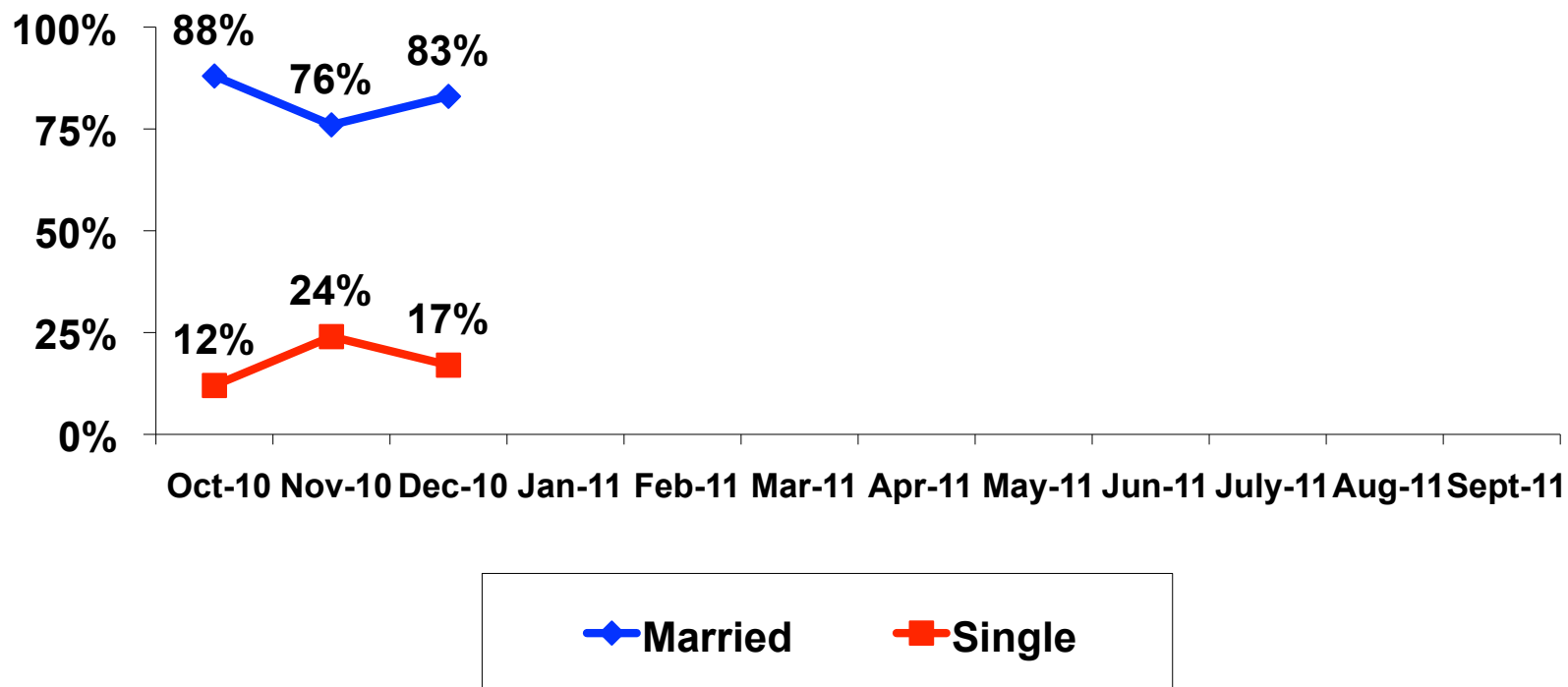
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

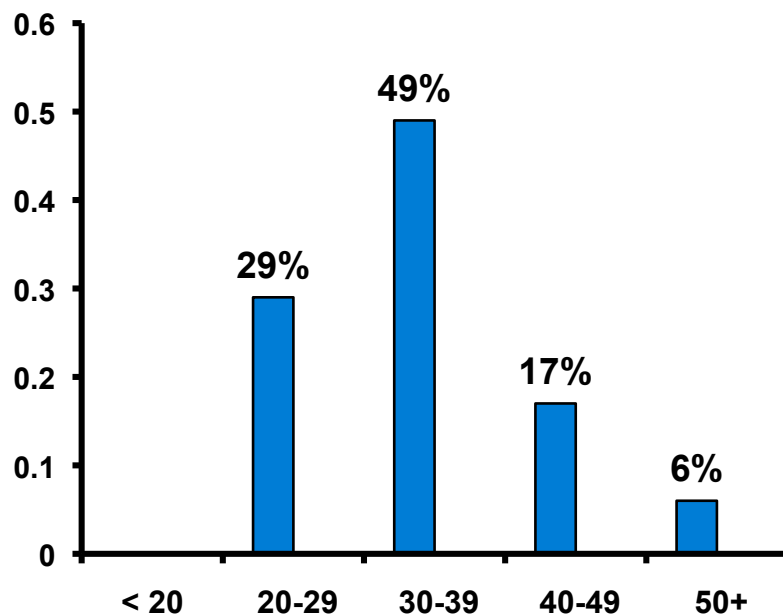


- A majority of visitors are married.

Marital Status

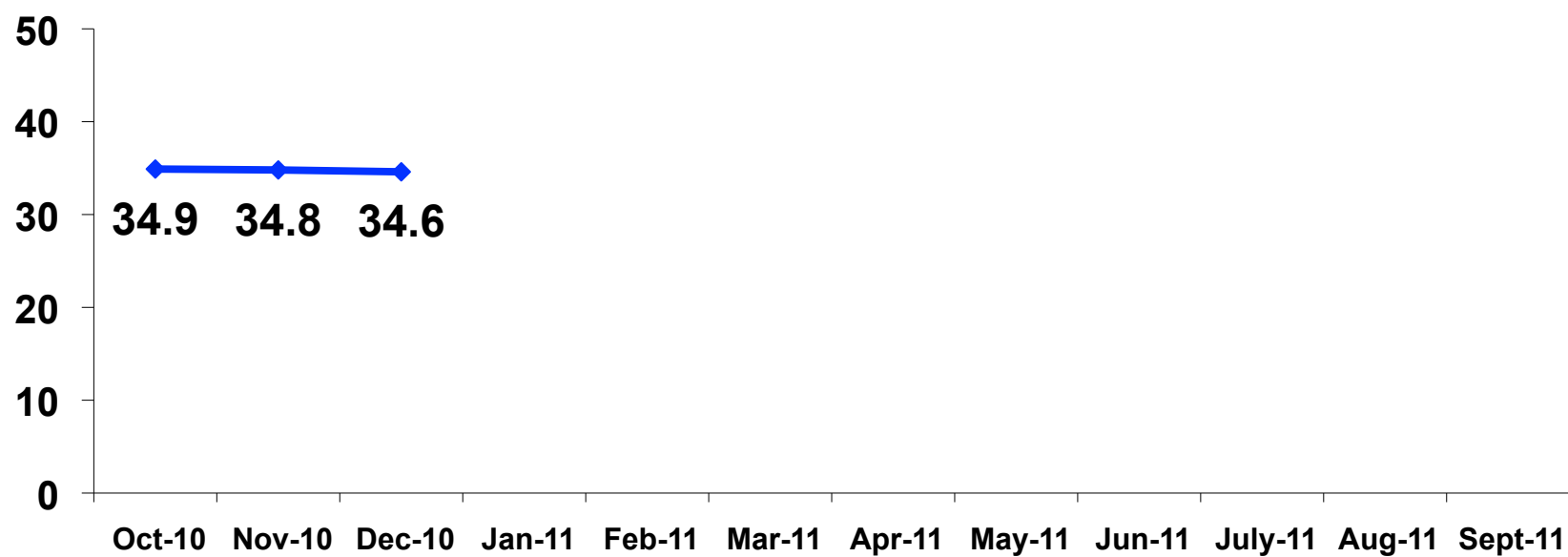


Age - Overall

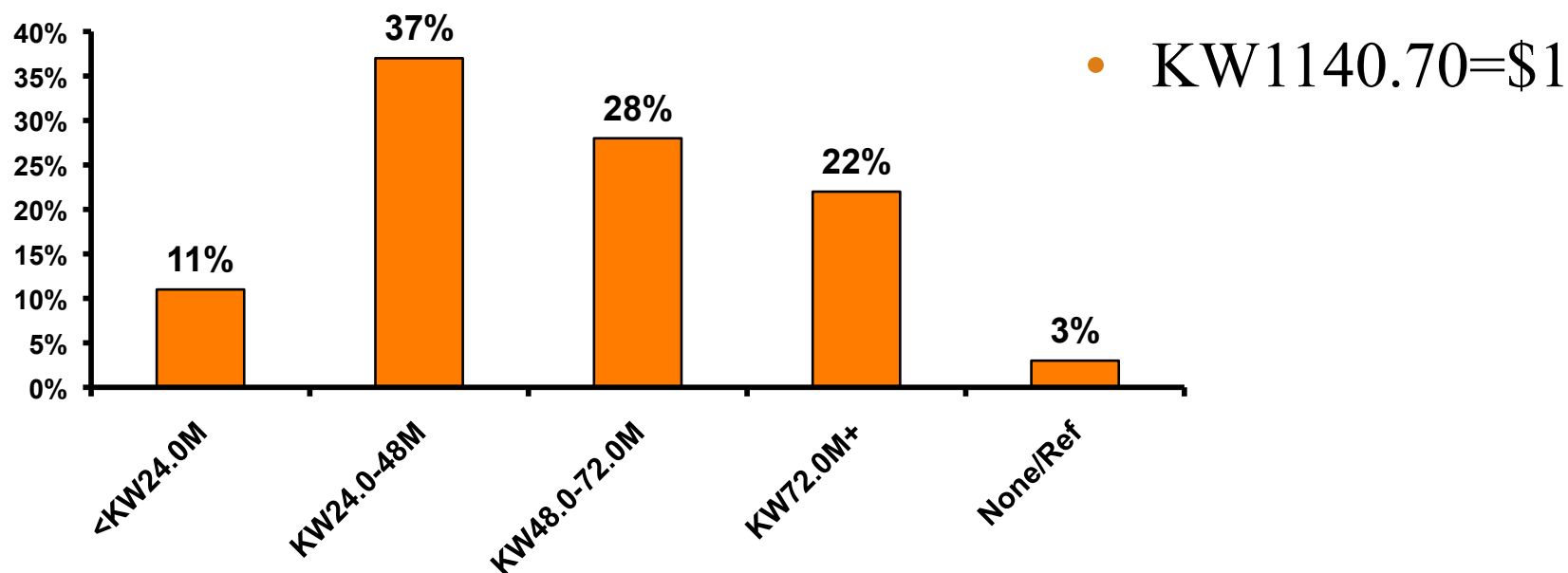


- The average age of the respondents is 34.6 years of age.

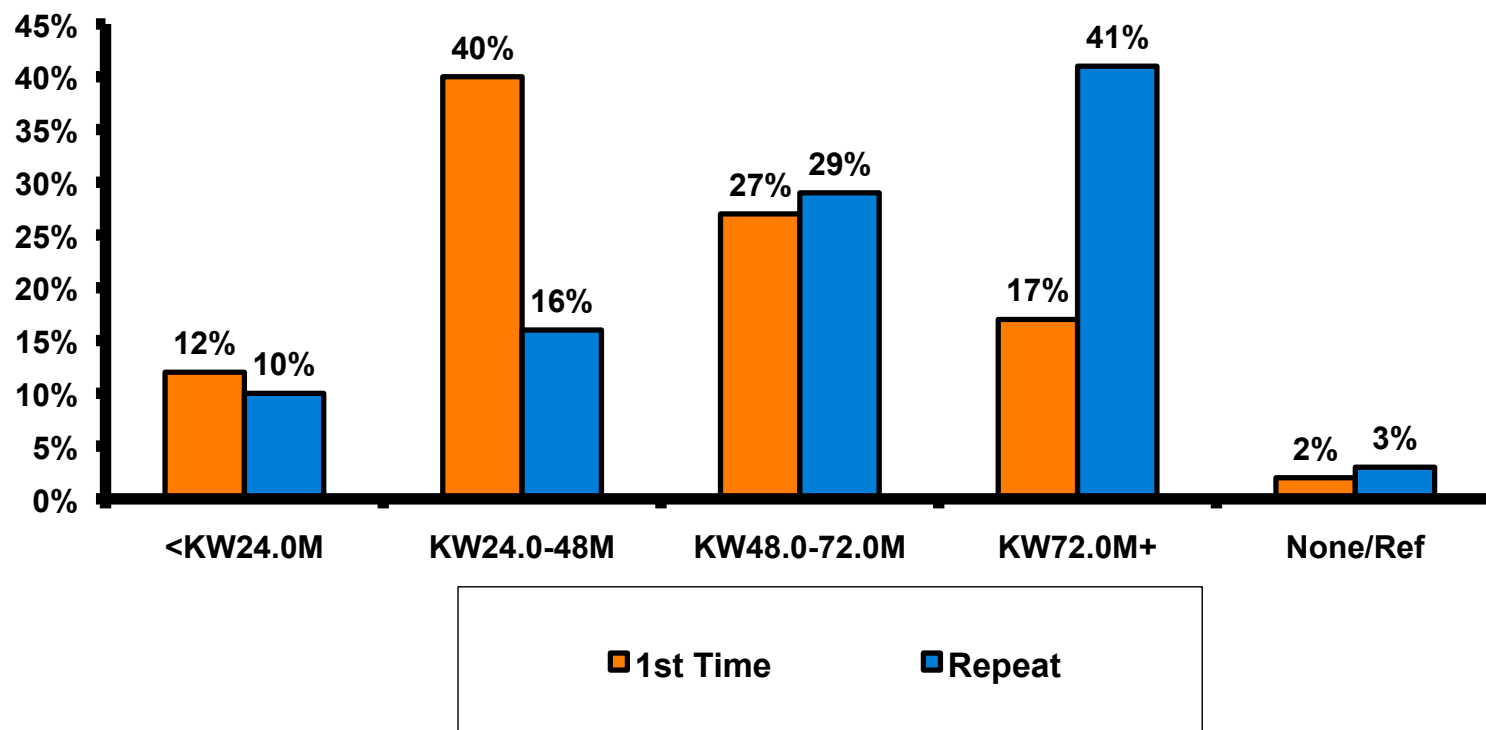
Average Age



Personal Income



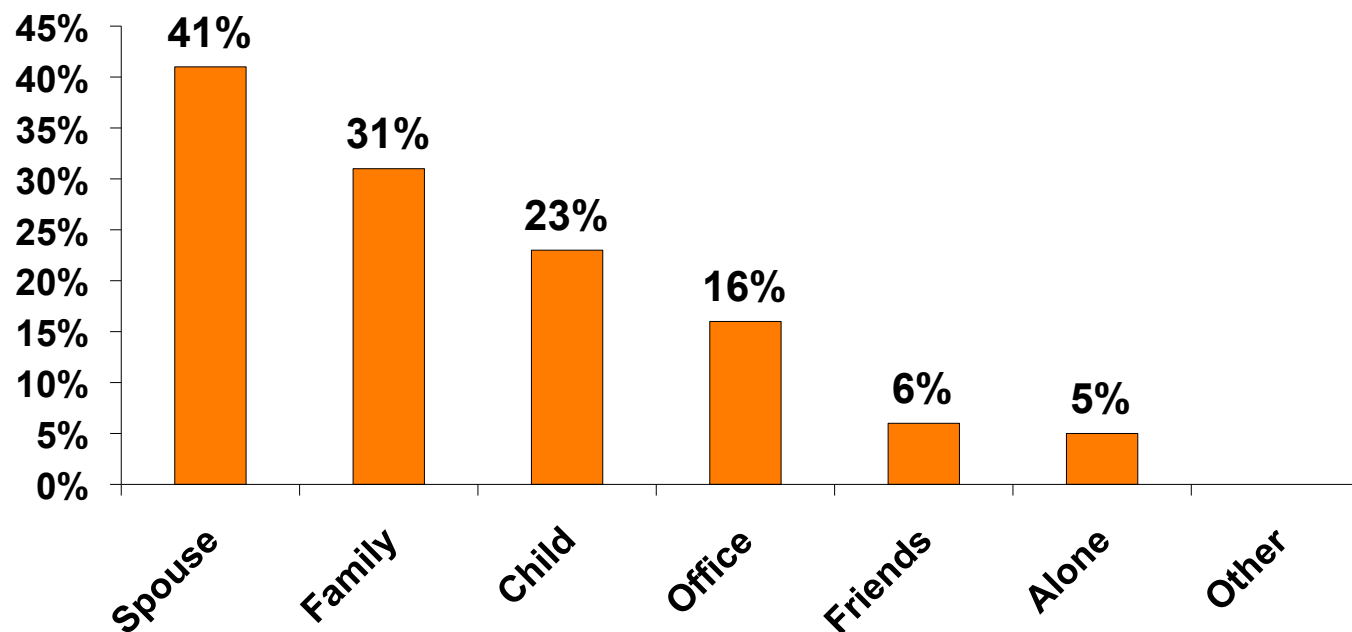
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	39	14	25	23	11	3	2
			11%	8%	15%	23%	6%	5%	12%
	KW24.0M-KW48.0M	Count	127	70	57	49	69	7	2
			37%	40%	33%	49%	40%	12%	12%
	KW48.0M-KW72.0M	Count	97	47	50	18	52	23	4
			28%	27%	29%	18%	30%	40%	24%
	KW72.0M+	Count	75	42	33	7	35	24	9
			22%	24%	19%	7%	20%	41%	53%
	Refused	Count	9	2	7	4	4	1	
			3%	1%	4%	4%	2%	2%	
Total	Count	347	175	172	101	171	58	17	

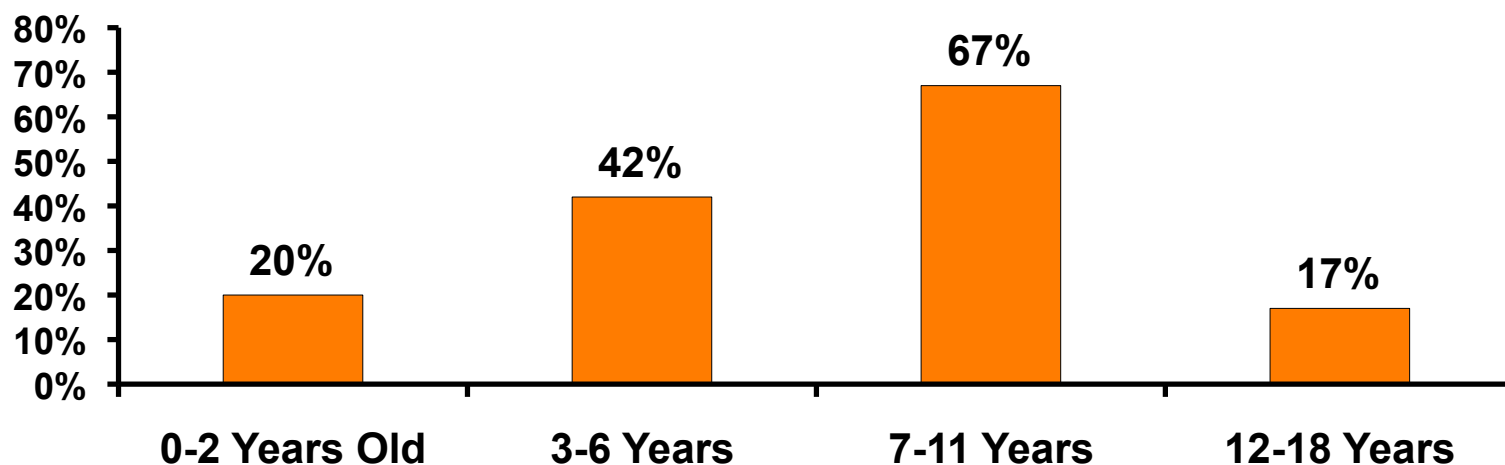
Travel Companions



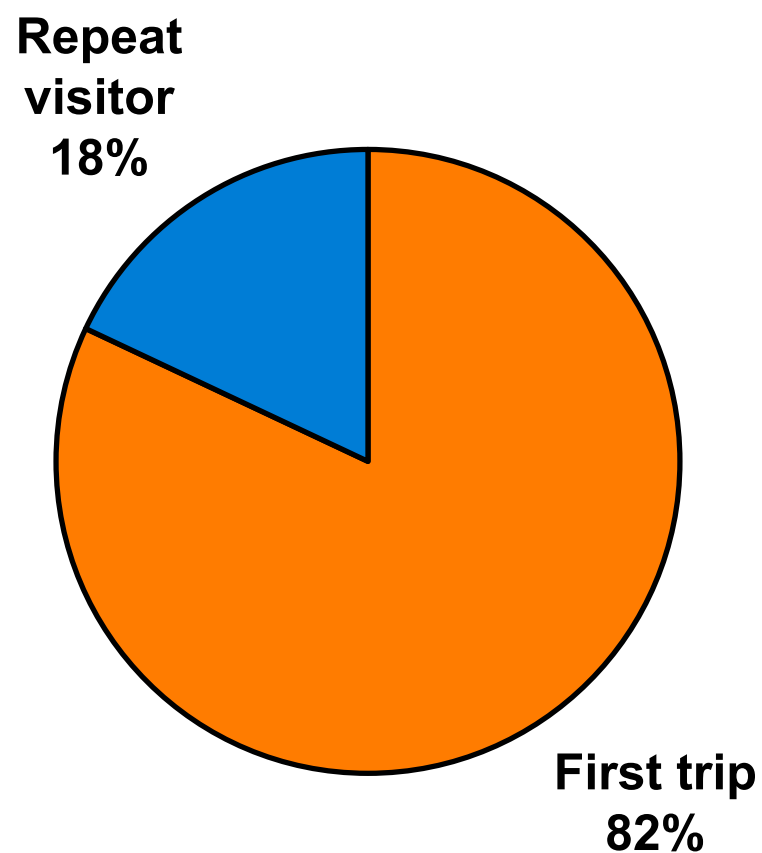
Number of Children Travel Party

N=82 total respondents traveling with children.

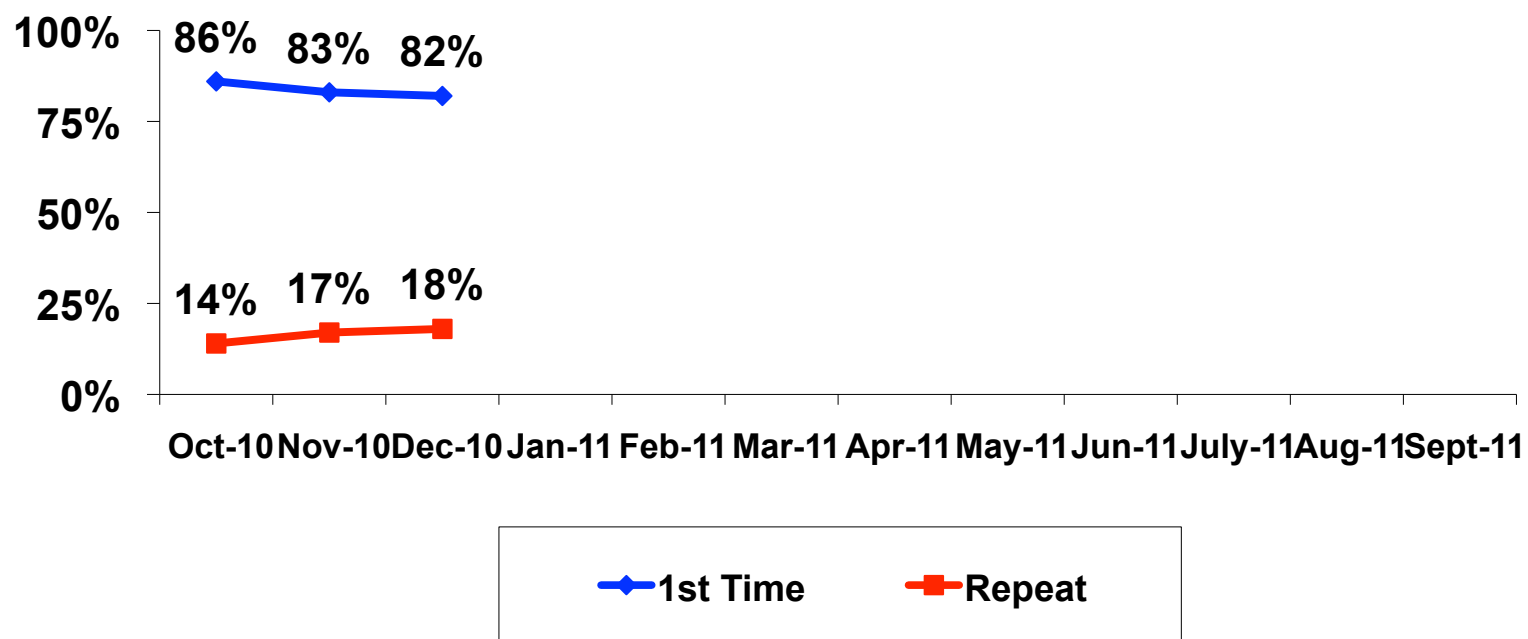
(Of those N=82 respondents, there is a total of 137 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



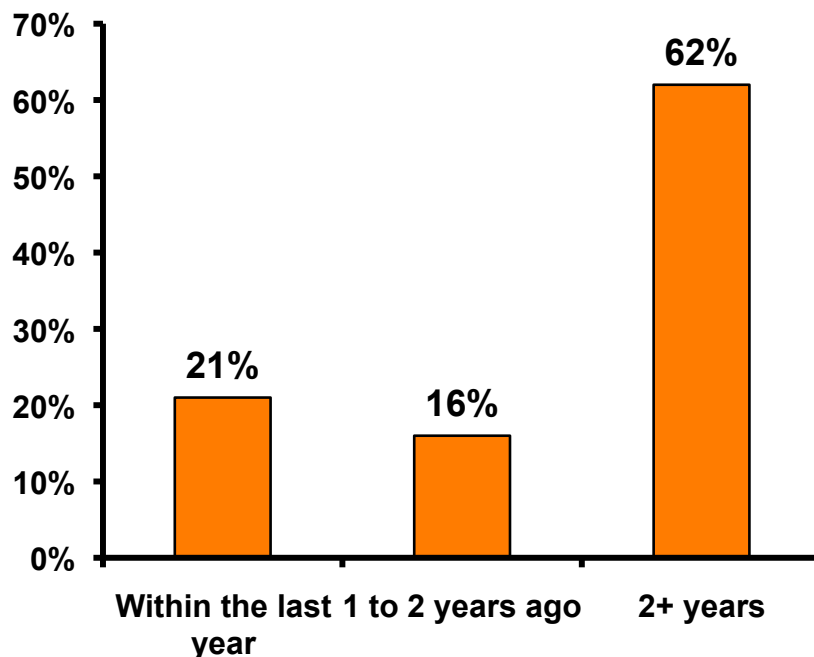
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	178	151	27
			50%	52%	44%
	Female	Count	176	141	35
			50%	48%	56%
Total		Count	354	292	62
AGE	20-29	Count	103	99	4
			29%	34%	6%
	30-39	Count	172	136	36
			49%	47%	58%
	40-49	Count	59	45	14
			17%	15%	23%
	50+	Count	20	12	8
			6%	4%	13%
Total		Count	354	292	62

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

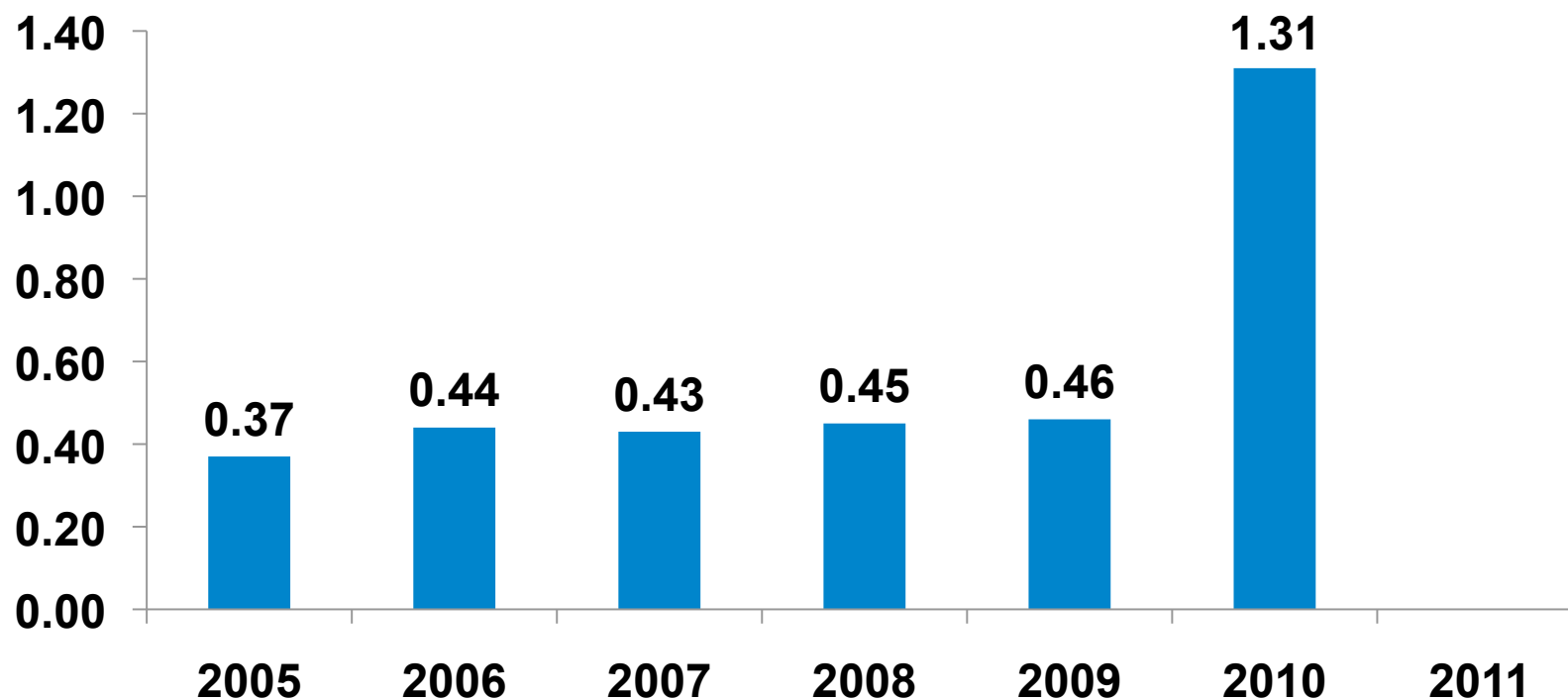
Repeat Visitors Last Trip

n = 61

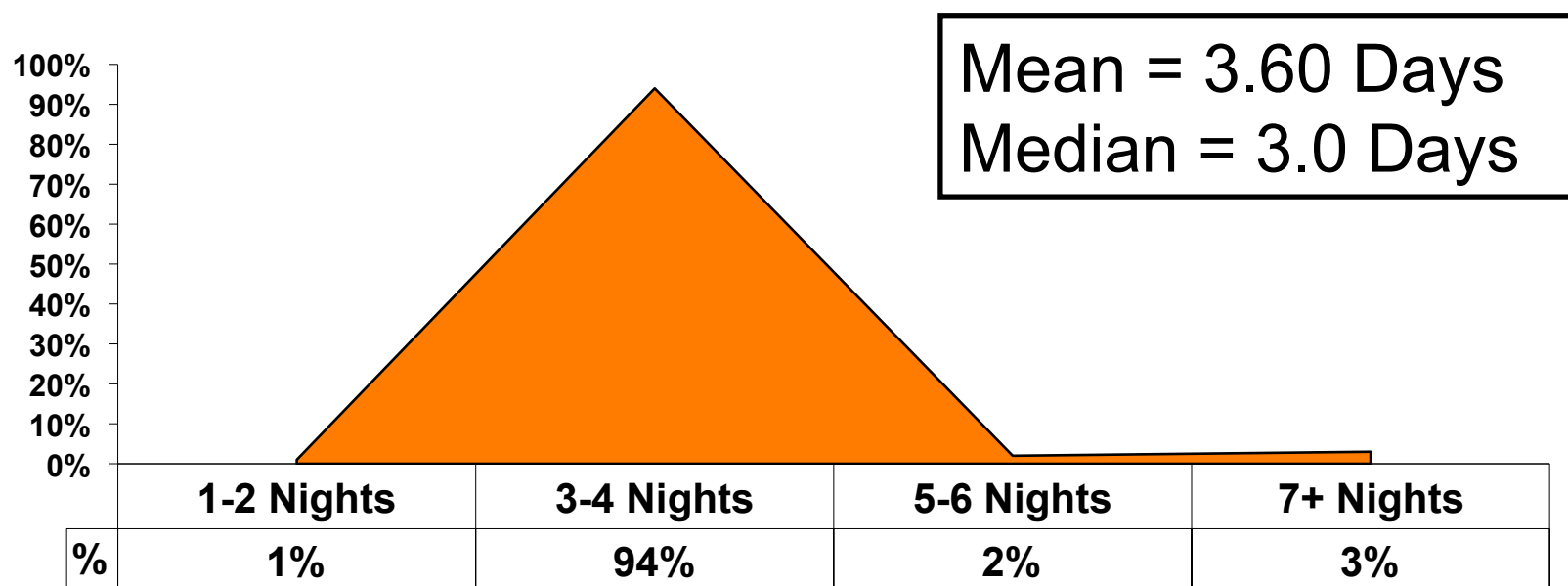


- The average repeat visitor has been to Guam 2.6 times.
- Roughly 1/3 of the repeat visitors have been to Guam within the last 2 years.

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



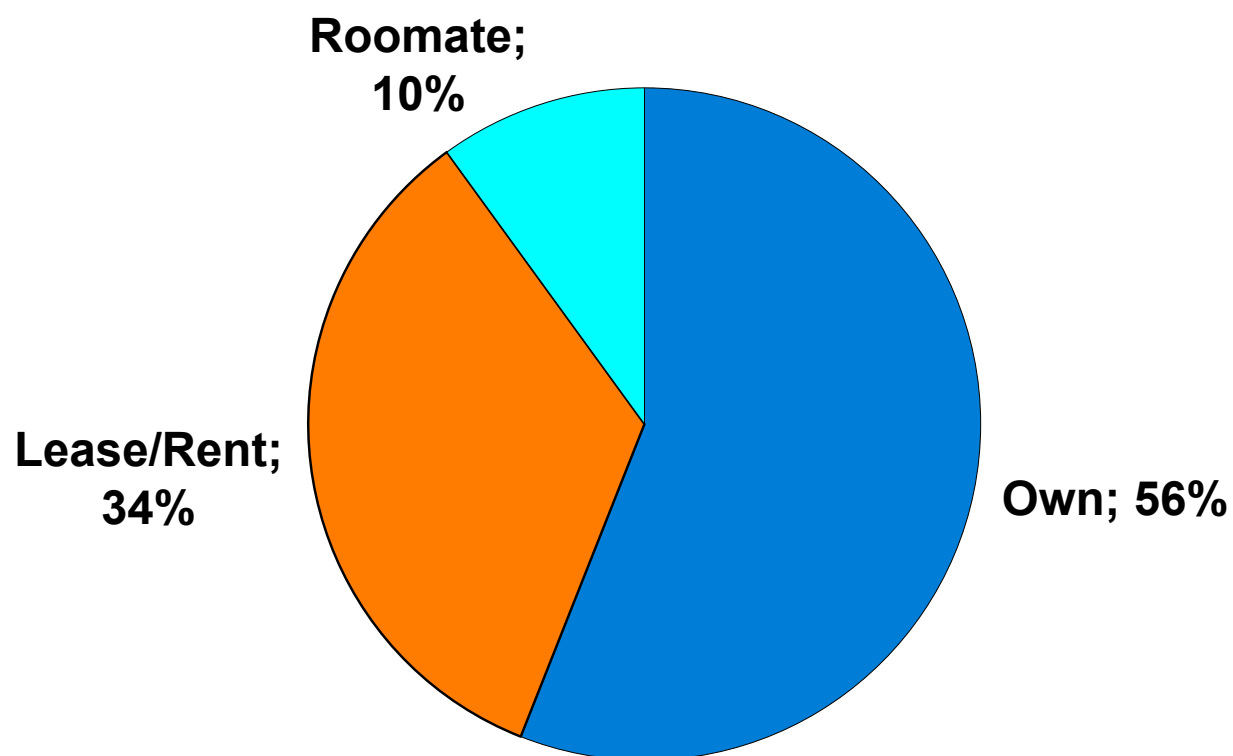
Length of Stay



Average Length of Stay



Living Accommodations

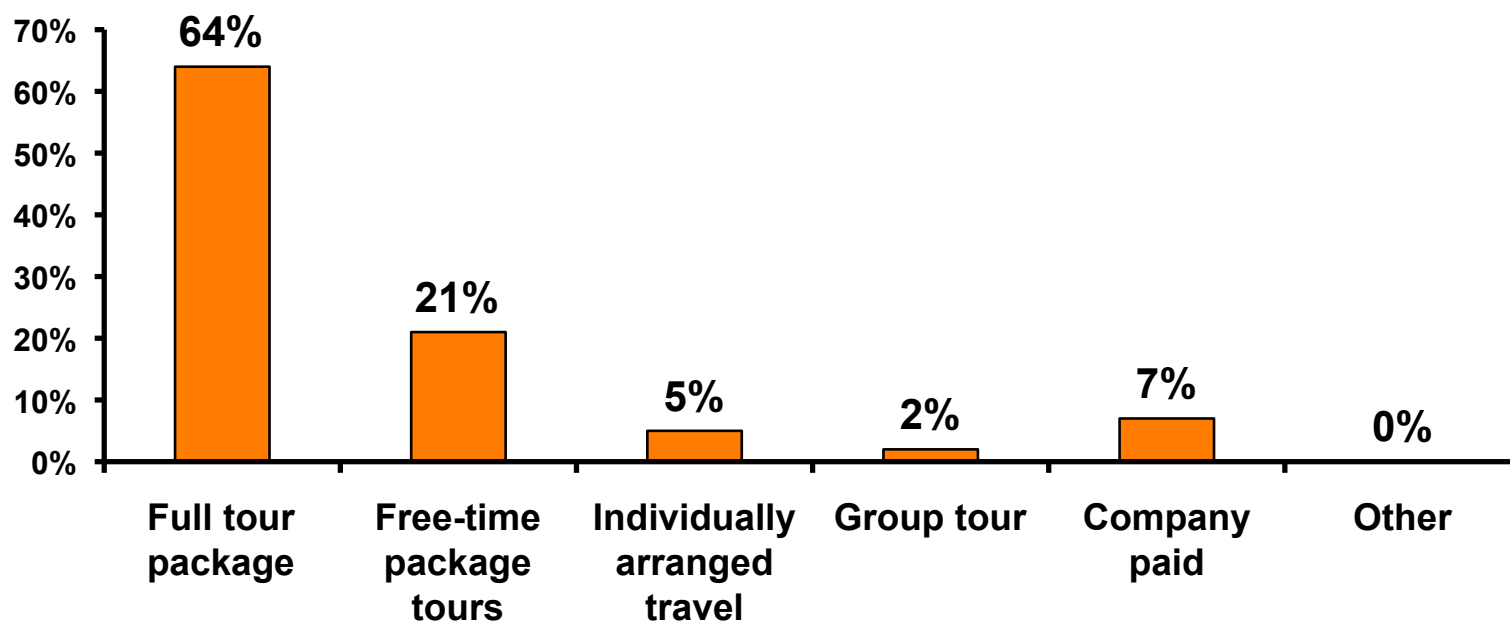


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	31%	24%	39%	34%	19%	11%
	Self-employed	16%	16%	9%	12%	32%	11%
	Homemaker	11%	11%	6%	14%	12%	33%
	Prof/Specialist/Tech	11%	13%	10%	12%	12%	
	Service worker	6%	16%	8%	3%	3%	
	Sales/Clerical	5%		6%	7%	4%	
	Professor/Teacher	5%	5%	6%	4%	5%	
	Govt-Mgr	2%		2%	2%	4%	
	Unemployed	2%	5%	1%	1%		22%
	Skilled worker	2%	3%	2%	2%		
	Govt - Office/non-mgr	1%		3%	1%		
	Govt-Exec	1%		3%		1%	
	Other	1%			2%	4%	
	Manager	1%	3%		2%	1%	
	Student	1%	3%	1%			22%
	Free-lancer	1%		2%		1%	
	Farmer	1%	3%		1%		
	Judicial	0%			1%		
Total	Count	351	38	127	97	73	9

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

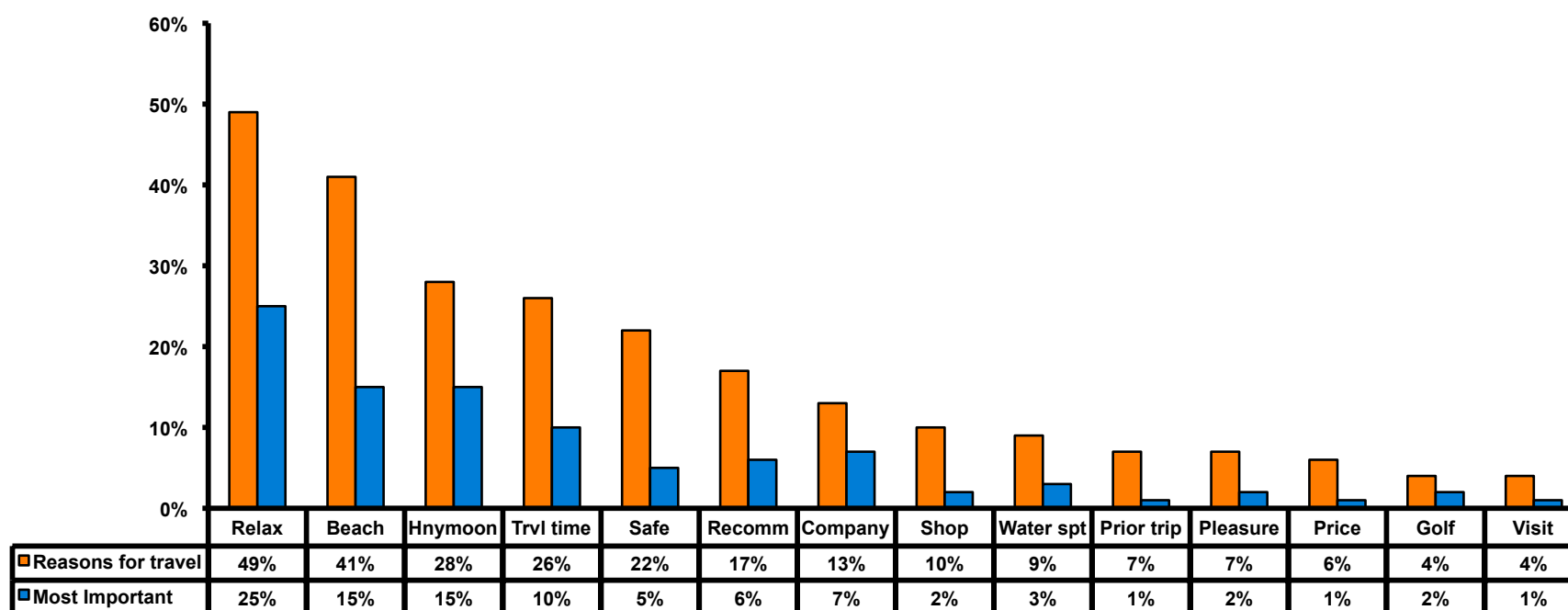


Accommodation by Income

Average length of stay: 3.60 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	52%	51%	46%	53%	61%	56%
	Hyatt Regency Guam	15%	15%	15%	14%	16%	11%
	Sheraton Laguna Resort	8%	10%	13%	7%	1%	
	The Westin Resort Guam	6%	3%	6%	8%	8%	
	Onward Beach Resort	5%	8%	6%	4%	4%	
	Guam Reef Hotel	3%	3%	5%	3%		11%
	Outrigger Guam Resort	3%	3%	4%	2%	1%	
	Hilton Guam Resort & Spa	3%		2%	3%	4%	
	Hotel Nikko Guam	1%	3%	1%	1%	1%	
	Relatives, Friends, Home Stay	1%		1%	1%	1%	11%
	Leo Palace Resort	1%	3%	1%	1%		
	Holiday Resort Guam	1%	3%	1%	1%		
	Other	1%			1%		11%
	Guam Marriott Resort Hotel	0%				1%	
	Royal Orchid Guam	0%					
Total	Count	354	39	127	97	75	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
 - Honeymoon and
 - Guam's natural beauty/beaches
- 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	49%	41%	51%	59%	40%	46%	53%
	Beautiful seas, beaches, tropical climate	41%	35%	44%	42%	30%	37%	44%
	Honeymoon	28%	50%	27%	2%		32%	24%
	Short travel time	26%	17%	32%	27%	10%	28%	23%
	It is a safe place to spend a vacation	22%	17%	20%	37%	10%	23%	21%
	Recommendation of friend, relative, travel agency	17%	20%	17%	15%	5%	18%	16%
	My company sponsored me	13%	16%	12%	10%	15%	13%	13%
	Shopping	10%	11%	12%	2%	10%	7%	13%
	Water sports	9%	7%	9%	10%	10%	10%	7%
	A previous visit	7%	2%	10%	8%	10%	5%	10%
	Pleasure	7%	7%	7%	10%	5%	7%	8%
	Price of the tour package	6%	4%	7%	5%	5%	6%	5%
	To golf	4%	2%	2%	8%	20%	8%	1%
	To visit friends or relatives	4%	3%	4%	2%	15%	6%	2%
	Company or Business trip	4%	6%	2%		15%	3%	4%
	SCUBA diving	3%	2%	2%	5%	10%	5%	2%
	Organized Sporting Activity	2%	2%	1%	3%	5%	2%	2%
	Other	2%		2%	5%		2%	2%
	Promotional materials from GVB	1%	2%	1%	2%		1%	2%
	To get married or Attend wedding	1%	3%				1%	1%
	Convention, Conference, Trade show	1%	2%				1%	1%
	Special promotion	0%		1%				1%
Total	Cases	352	102	171	59	20	177	175

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	49%	41%	46%	56%	51%	44%
	Beautiful seas, beaches, tropical climate	41%	35%	43%	41%	39%	44%
	Honeymoon	28%	35%	45%	22%	7%	22%
	Short travel time	26%	30%	18%	24%	41%	11%
	It is a safe place to spend a vacation	22%	24%	18%	23%	24%	33%
	Recommendation of friend, relative, travel agency	17%	11%	20%	16%	13%	22%
	My company sponsored me	13%	24%	11%	10%	15%	
	Shopping	10%	11%	8%	15%	8%	
	Water sports	9%	5%	7%	10%	12%	
	A previous visit	7%	8%	4%	7%	13%	11%
	Pleasure	7%	5%	6%	8%	9%	11%
	Price of the tour package	6%	8%	5%	4%	8%	11%
	To golf	4%	5%	2%	4%	7%	
	To visit friends or relatives	4%		3%	5%	3%	11%
	Company or Business trip	4%	5%	1%	4%	5%	11%
	SCUBA diving	3%		6%	1%	1%	
	Organized Sporting Activity	2%	5%	1%	1%	3%	
	Other	2%		2%	1%	4%	
	Promotional materials from GVB	1%		2%	1%	1%	
	To get married or Attend wedding	1%	3%	2%			
Convention, Conference, Trade show	1%			1%	1%		
Special promotion	0%		1%				
Total	Cases	352	37	127	97	75	9

SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1140.70/US\$1

- \$1,976.30 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$17,533 = maximum (highest amount recorded for the entire sample)
- \$872.80 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

KW1140.70=\$1

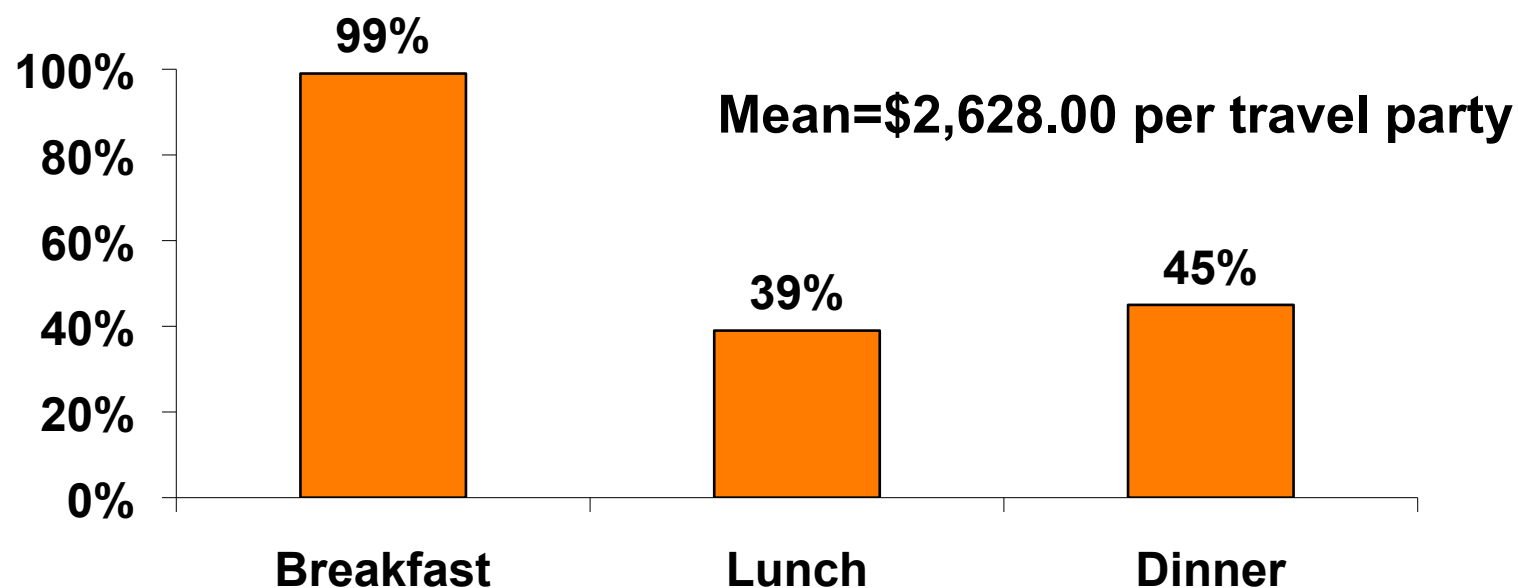
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,160.70
Air & Accommodation w/ daily meal package	\$2,628.00
Air only	\$958.50
Accommodation only	\$876.70
Accommodation w/ daily meal only	\$876.70
Food & Beverages in Hotel	\$95.60
Ground transportation - Korea	\$55.40
Ground transportation - Guam	\$45.50
Optional tours/ activities	\$421.20
Other expenses	\$453.60
Total Prepaid	\$1,976.30

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

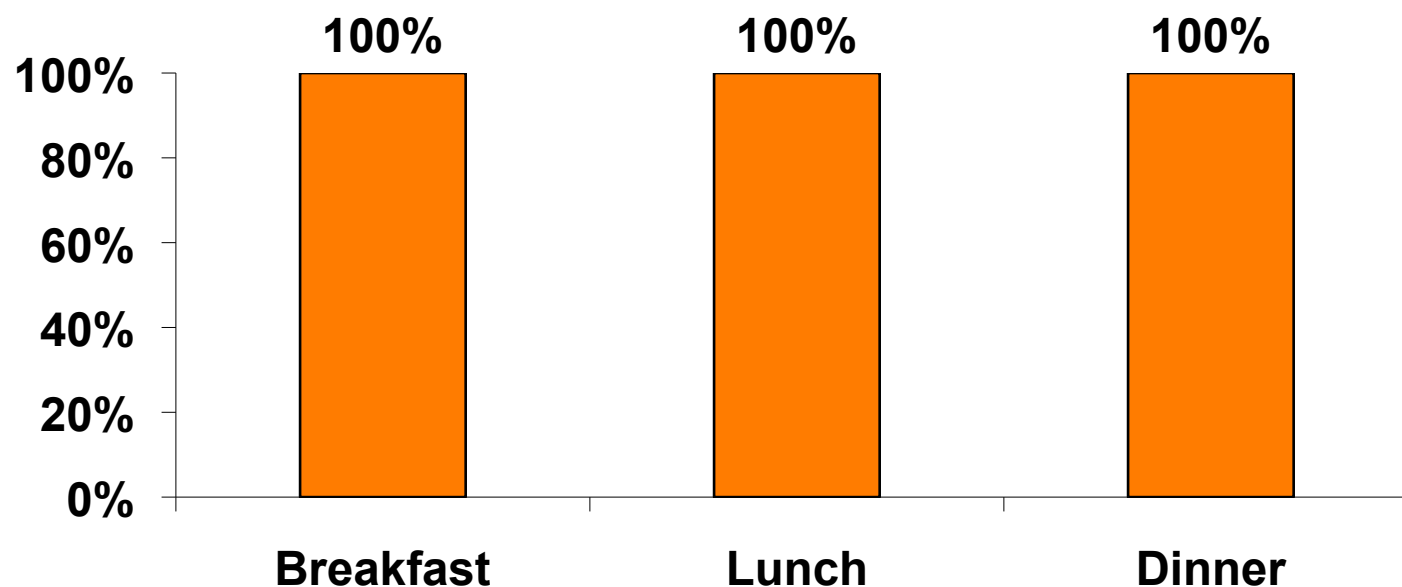
n=173



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

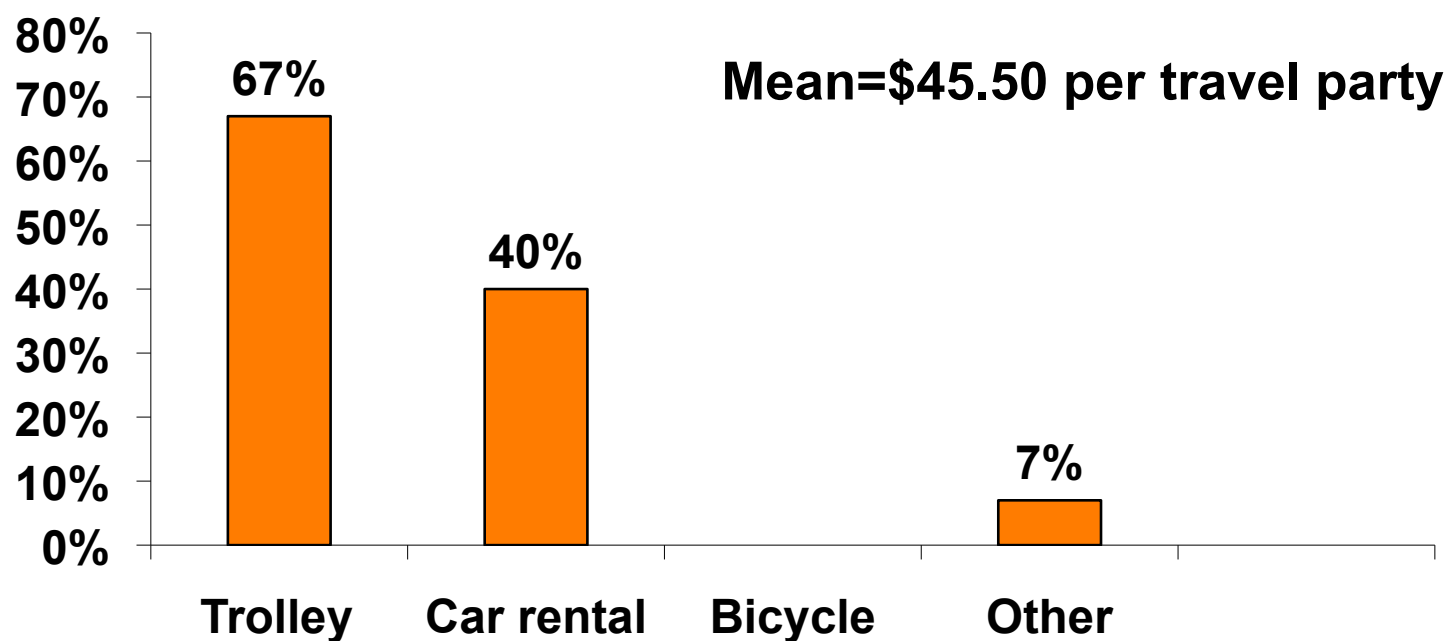
n=1



Mean= \$876.70 per travel party

Prepaid Ground Transportation

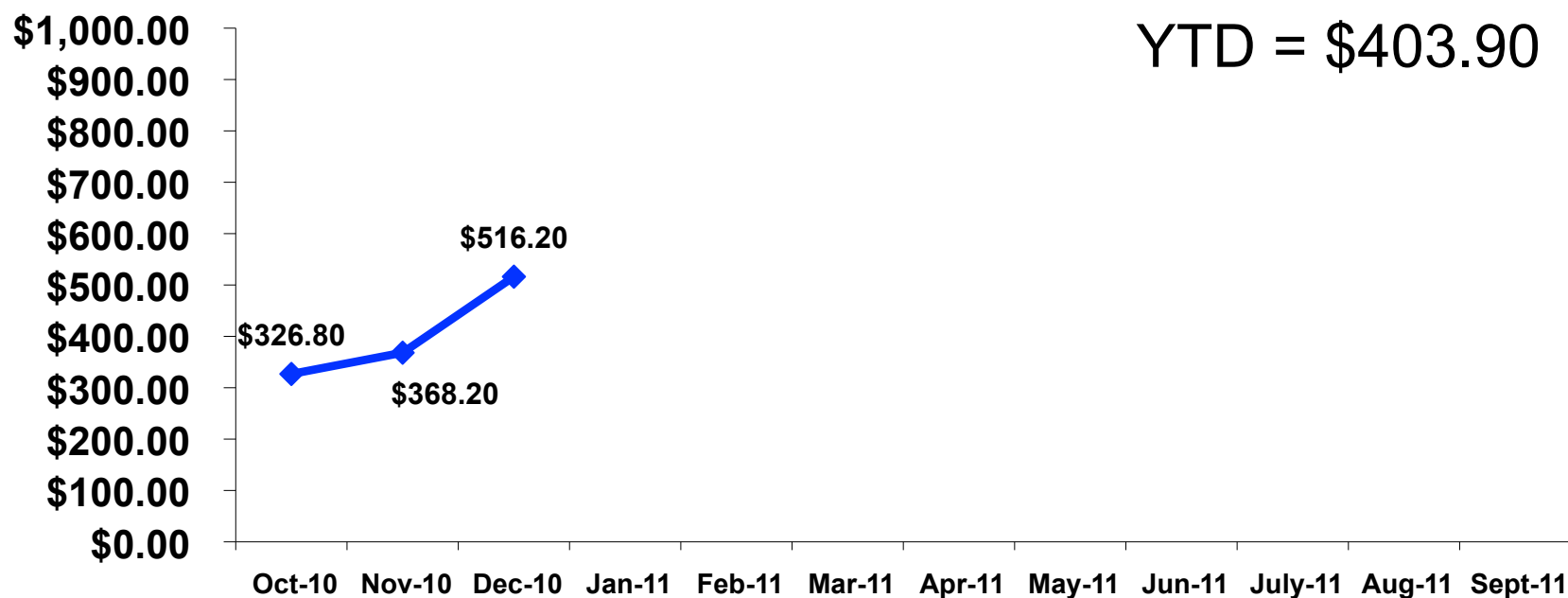
n=15



On-Island Expenditures

- \$976.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,830 = Maximum (highest amount recorded for the entire sample)
- \$516.20 = overall mean average per person on-island expenditure

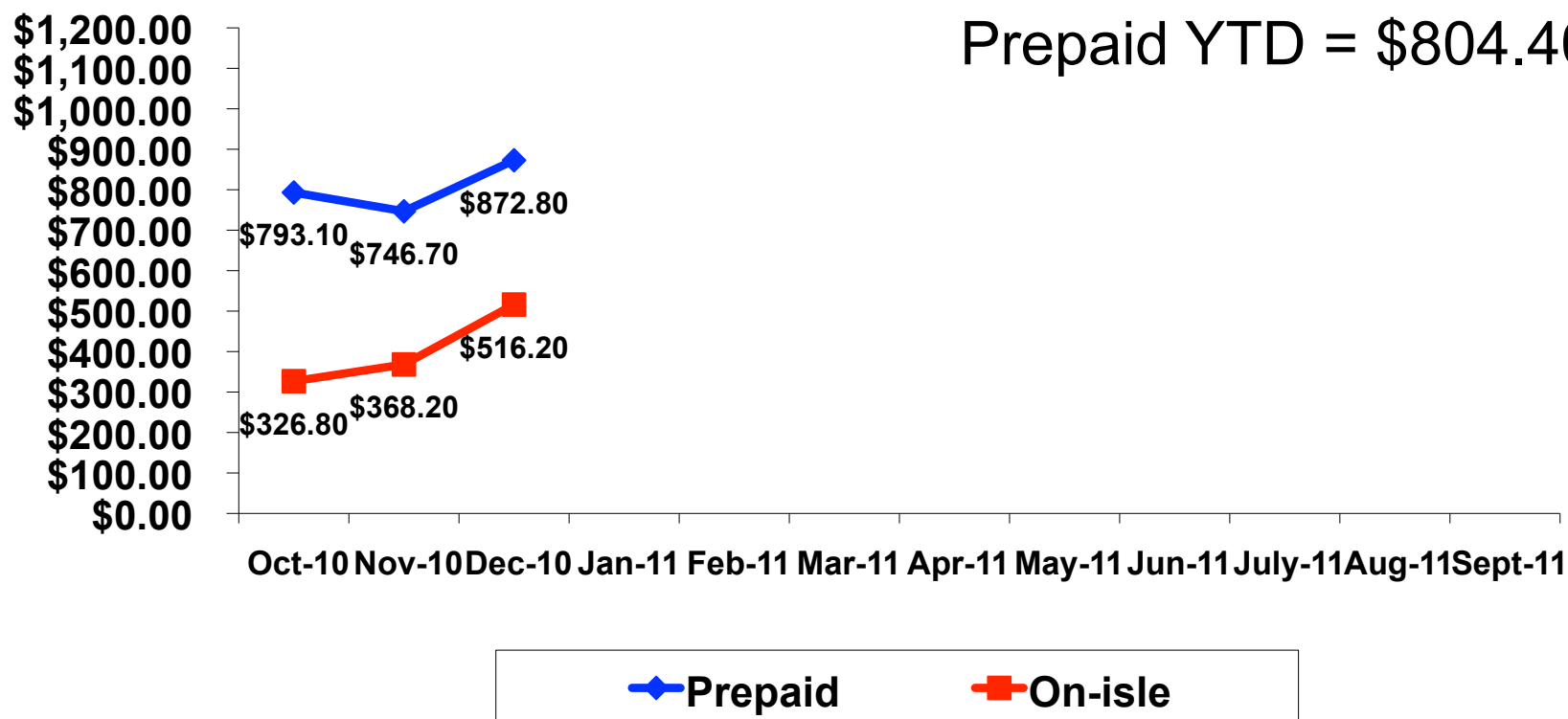
On-Island Expenditures



Prepaid / On-Island Expenditures

On-Island YTD = \$403.90

Prepaid YTD = \$804.40



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
					20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$976.82	\$1,017.65	\$935.53	\$989.11	\$920.26	\$1,194.32	\$1,335.77	\$935.55	\$950.58	\$895.04	\$910.00
	Median	\$615	\$700	\$598	\$625	\$700	\$900	\$715	\$600	\$586	\$600	\$530

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$31.93	\$40.65	\$23.05	\$8.64	\$26.07	\$66.64	\$98.65
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$17.82	\$22.81	\$12.73	\$11.57	\$21.17	\$20.00	\$14.35
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$36.49	\$45.96	\$26.85	\$21.30	\$44.81	\$29.66	\$62.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$144.62	\$180.42	\$108.21	\$124.97	\$148.23	\$198.37	\$55.25
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$254.03	\$205.72	\$303.16	\$266.89	\$273.31	\$122.69	\$410.00
	Median	\$0	\$0	\$10	\$19	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$149.54	\$161.13	\$137.75	\$186.78	\$137.66	\$155.58	\$44.00
	Median	\$0	\$0	\$0	\$20	\$0	\$0	\$0
LOCAL TRANS	Mean	\$18.87	\$18.46	\$19.30	\$17.30	\$17.20	\$22.19	\$31.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$330.79	\$350.77	\$310.69	\$335.50	\$269.66	\$452.37	\$470.50
	Median	\$20	\$10	\$28	\$10	\$30	\$6	\$20
TOTAL ON ISLAND	Mean	\$976.82	\$1,017.65	\$935.53	\$955.31	\$934.19	\$1,067.51	\$1,186.75
	Median	\$615	\$700	\$598	\$600	\$600	\$700	\$565

On-Island Expenditures

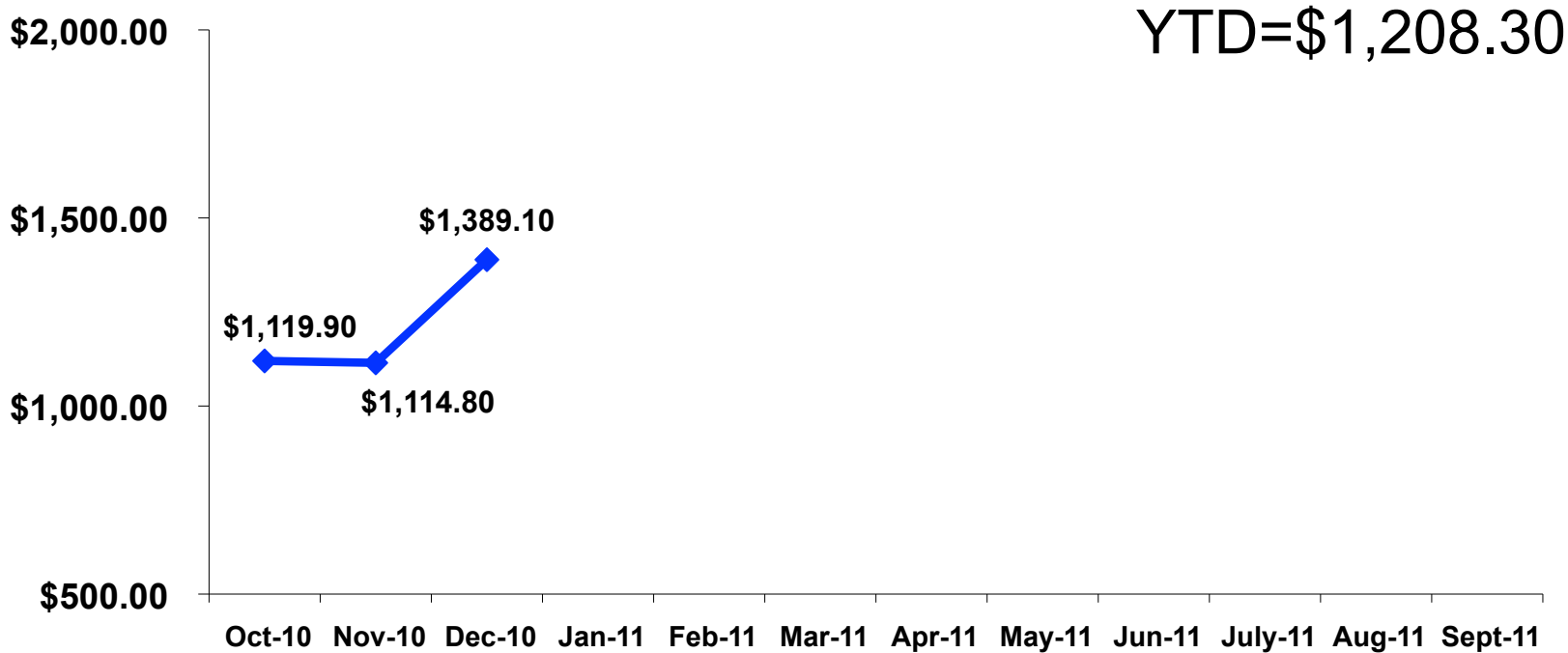
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$27.64	\$52.05
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$15.33	\$29.50
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$22.99	\$99.84
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$147.42	\$131.52
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$223.03	\$399.52
	Median	\$0	\$60
GIFT/ SOUV- F&F AT HOME	Mean	\$160.38	\$98.68
	Median	\$0	\$0
LOCAL TRANS	Mean	\$13.88	\$42.29
	Median	\$0	\$0
OTHER EXP	Mean	\$308.17	\$436.94
	Median	\$12	\$30
TOTAL ON ISLAND	Mean	\$910.26	\$1,290.32
	Median	\$600	\$782

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,389.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,035 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

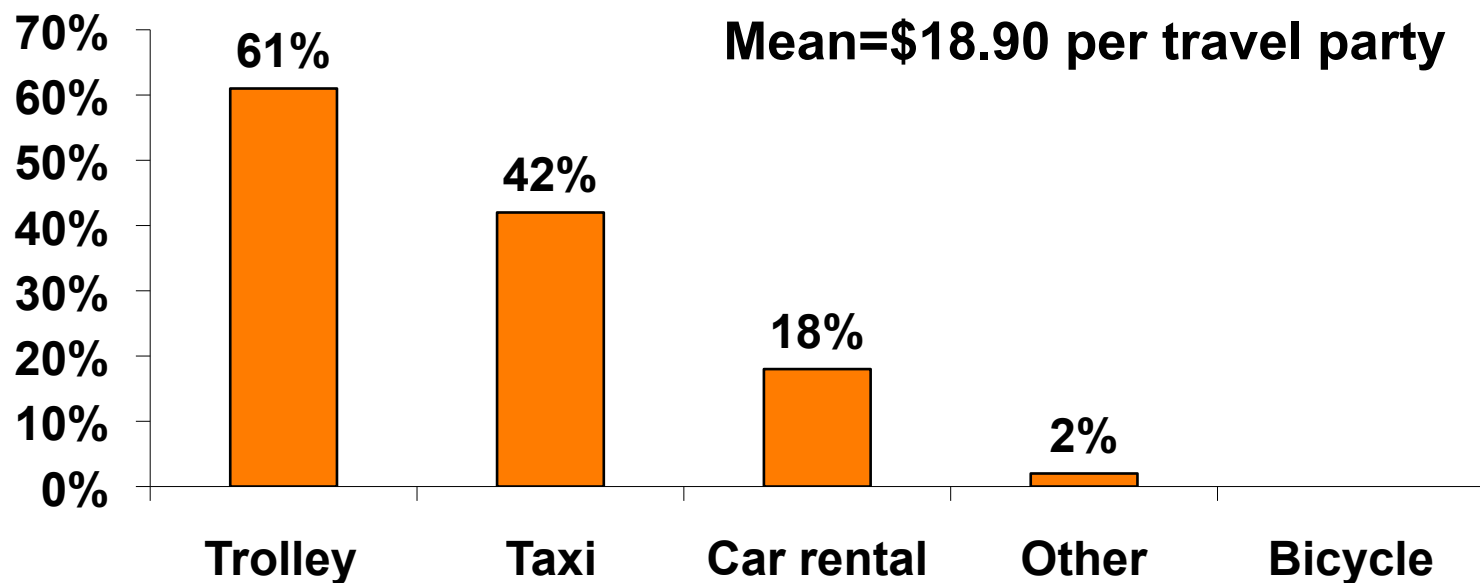


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$31.90
Food & beverage in fast food restaurant/ convenience store	\$17.80
Food & beverage at restaurants or drinking establishments outside a hotel	\$36.50
Optional tours and activities	\$144.60
Gifts/ souvenirs for yourself/companions	\$254.00
Gifts/ souvenirs for friends/family at home	\$149.50
Local transportation	\$18.90
Other expenses not covered	\$330.80
Average Total	\$976.80

Local Transportation

n=85



Guam Airport Expenditures

- \$91.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,030 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

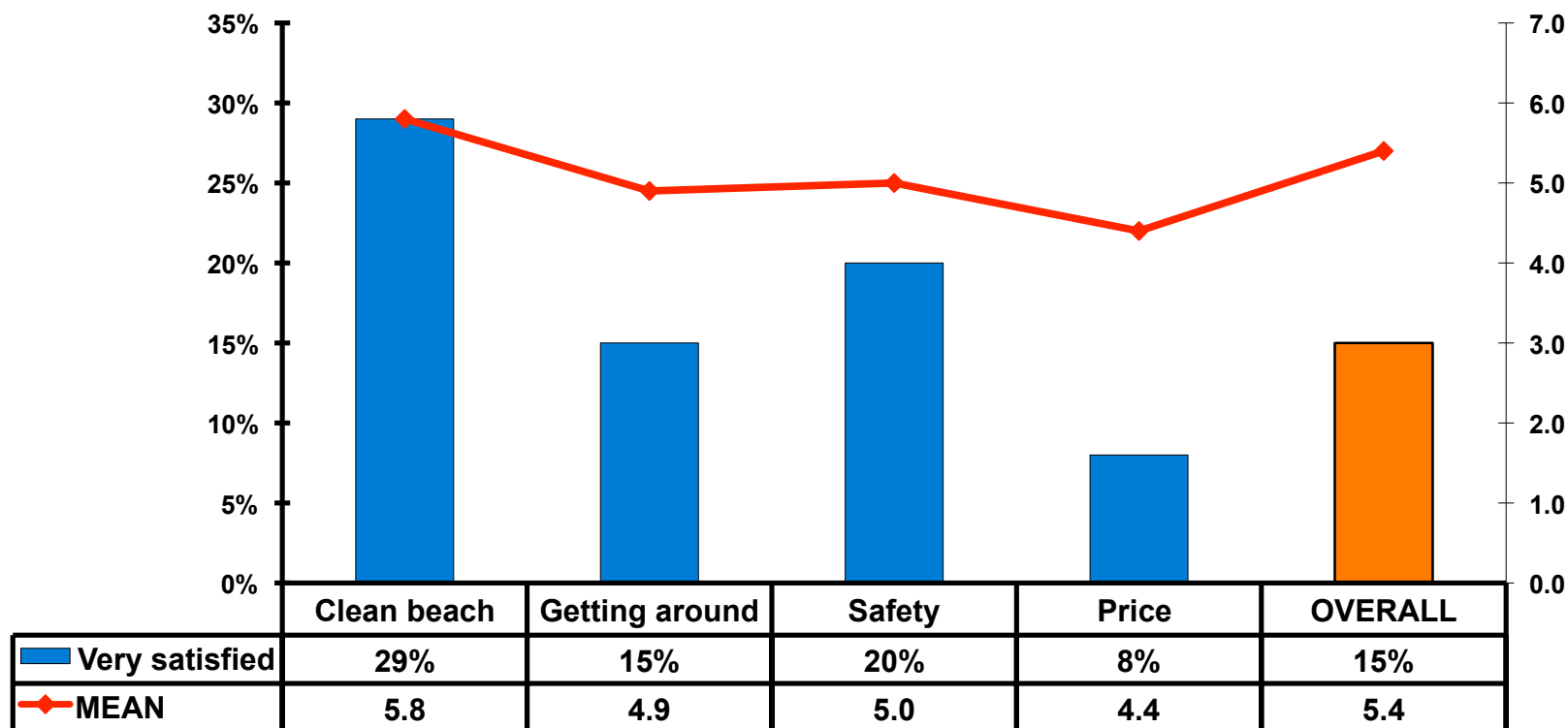
	MEAN \$
Food & Beverages	\$4.90
Gifts/Souvenirs Self	\$38.40
Gifts/Souvenirs Others	\$47.90
Total	\$91.10

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

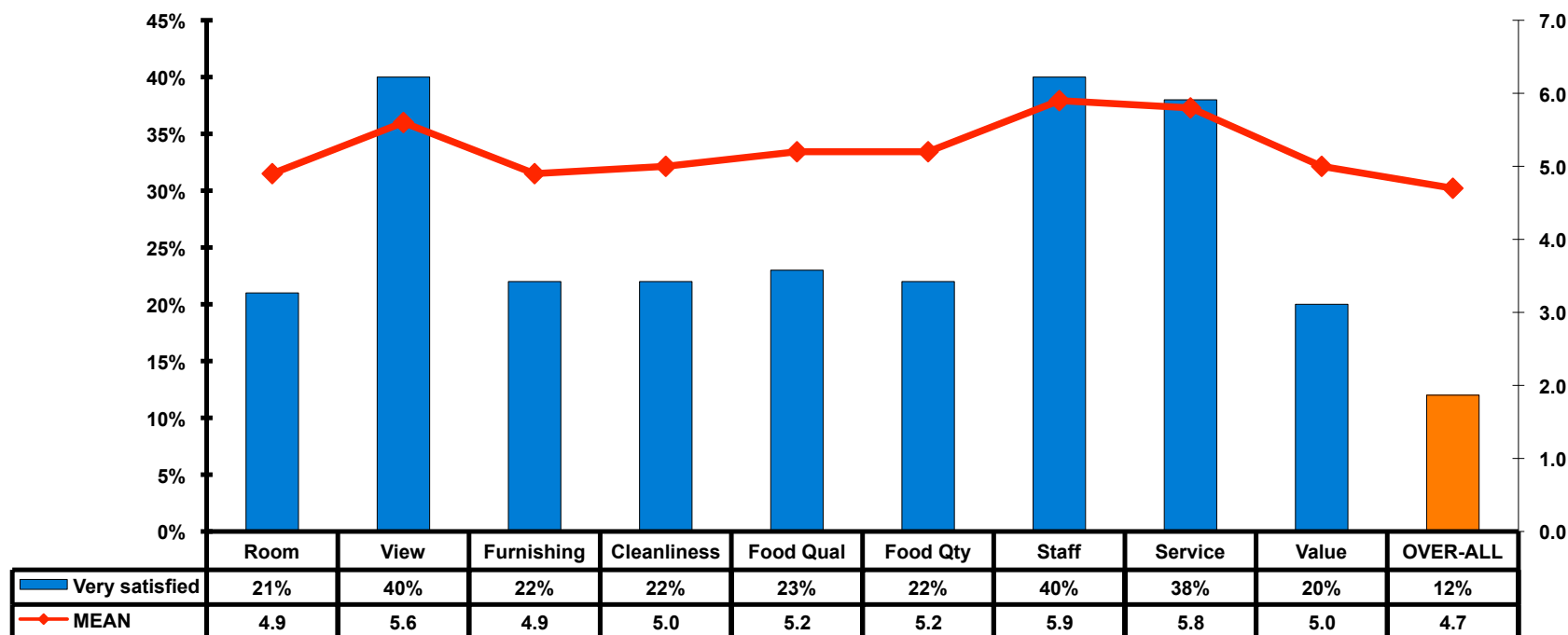
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

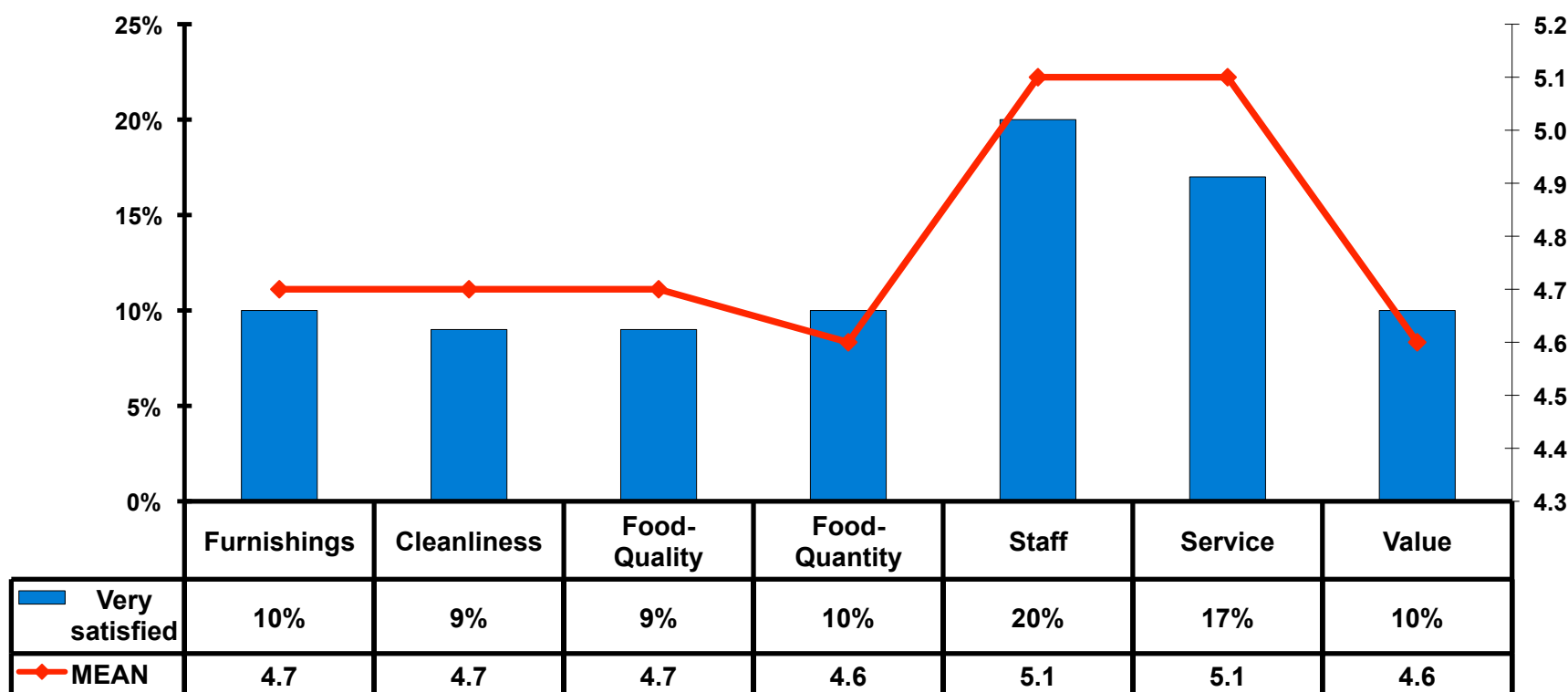
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

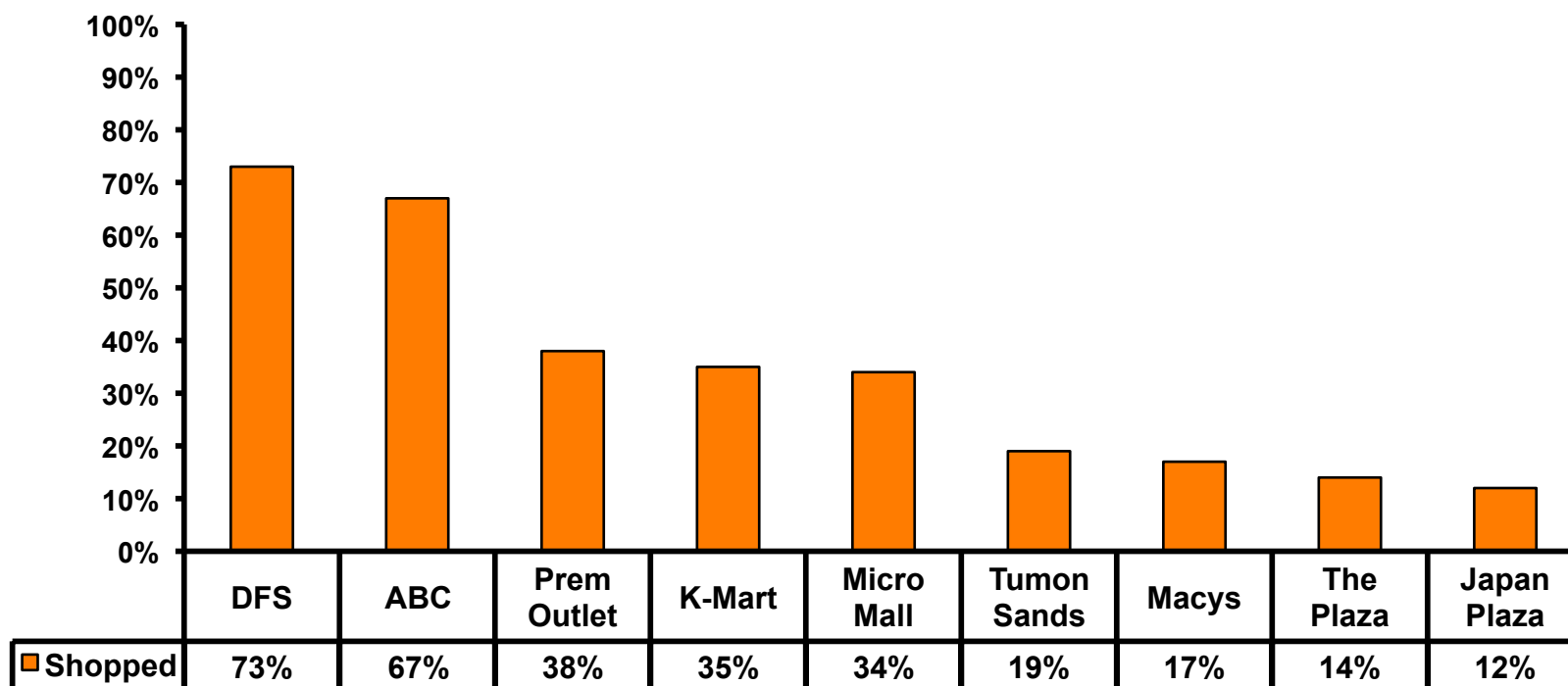
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

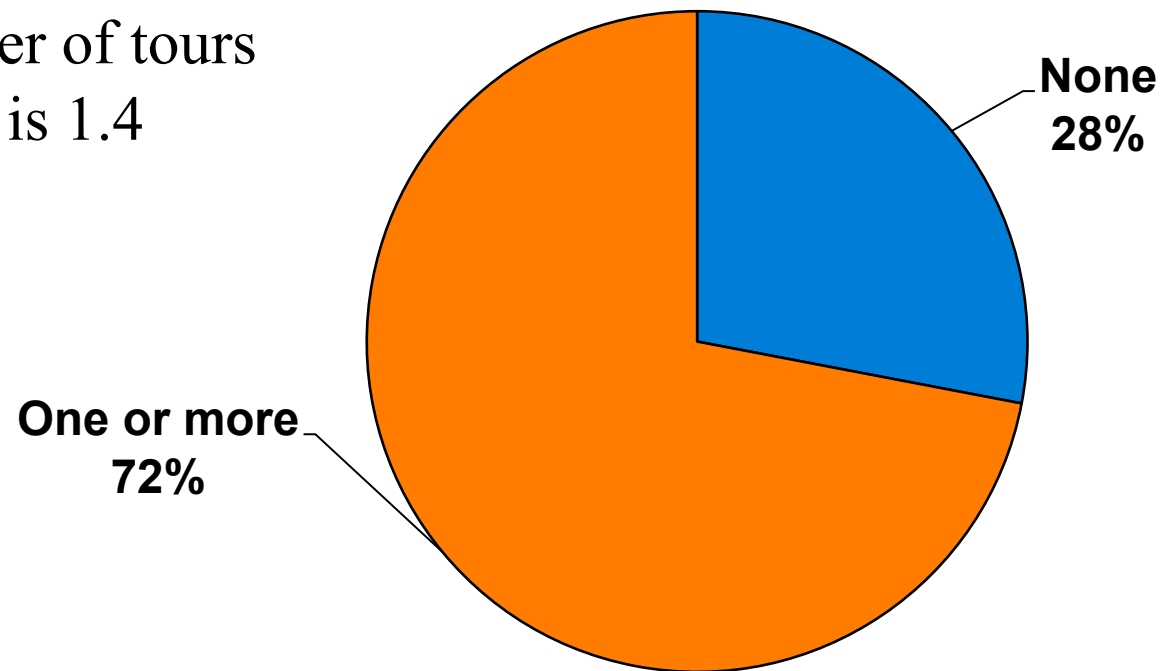
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 47%	Score of 6 to 7 = 40%
Score of 4 to 5 = 45%	Score of 4 to 5 = 49%
Score 1 to 3 = 8%	Score 1 to 3 = 11%
MEAN = 5.2	MEAN = 5.0

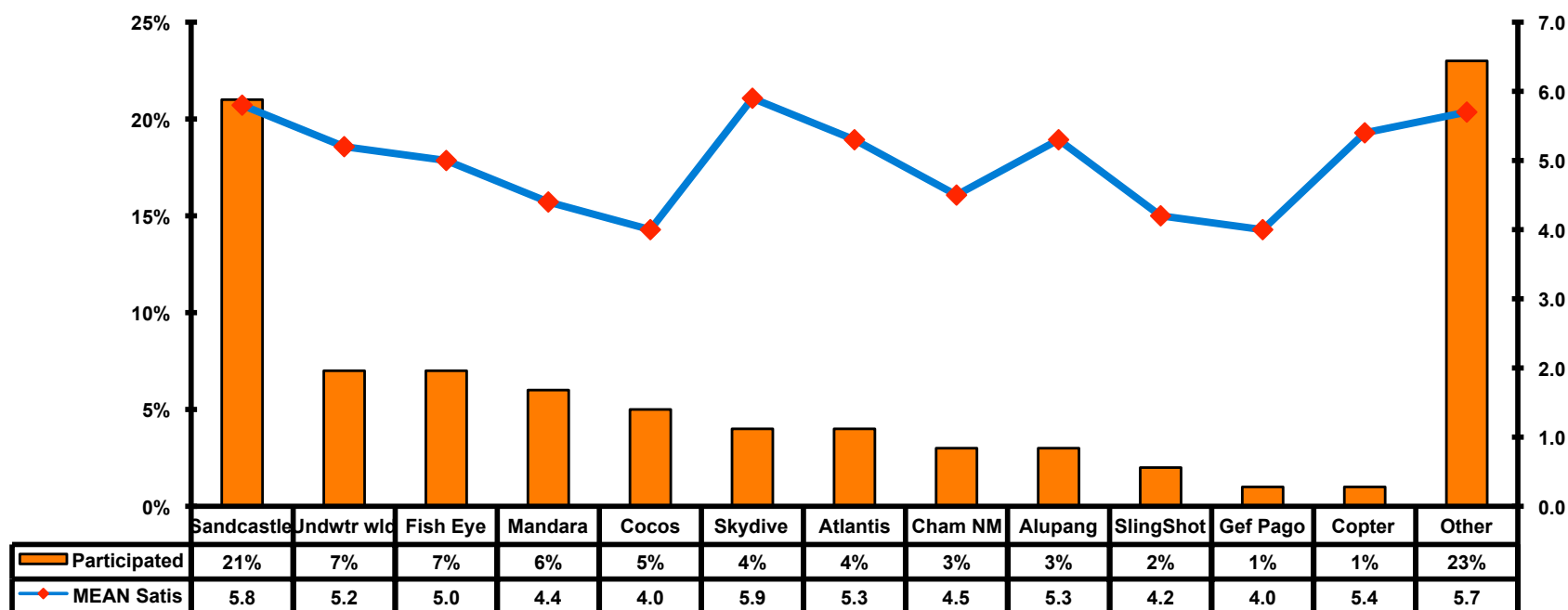
Optional Tour Participation

- Average number of tours participated in is 1.4



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 = 41%	Score of 6 to 7 = 35%
Score of 4 to 5 = 50%	Score of 4 to 5 = 50%
Score 1 to 3 = 8%	Score 1 to 3 = 16%
MEAN = 5.1	MEAN = 4.8

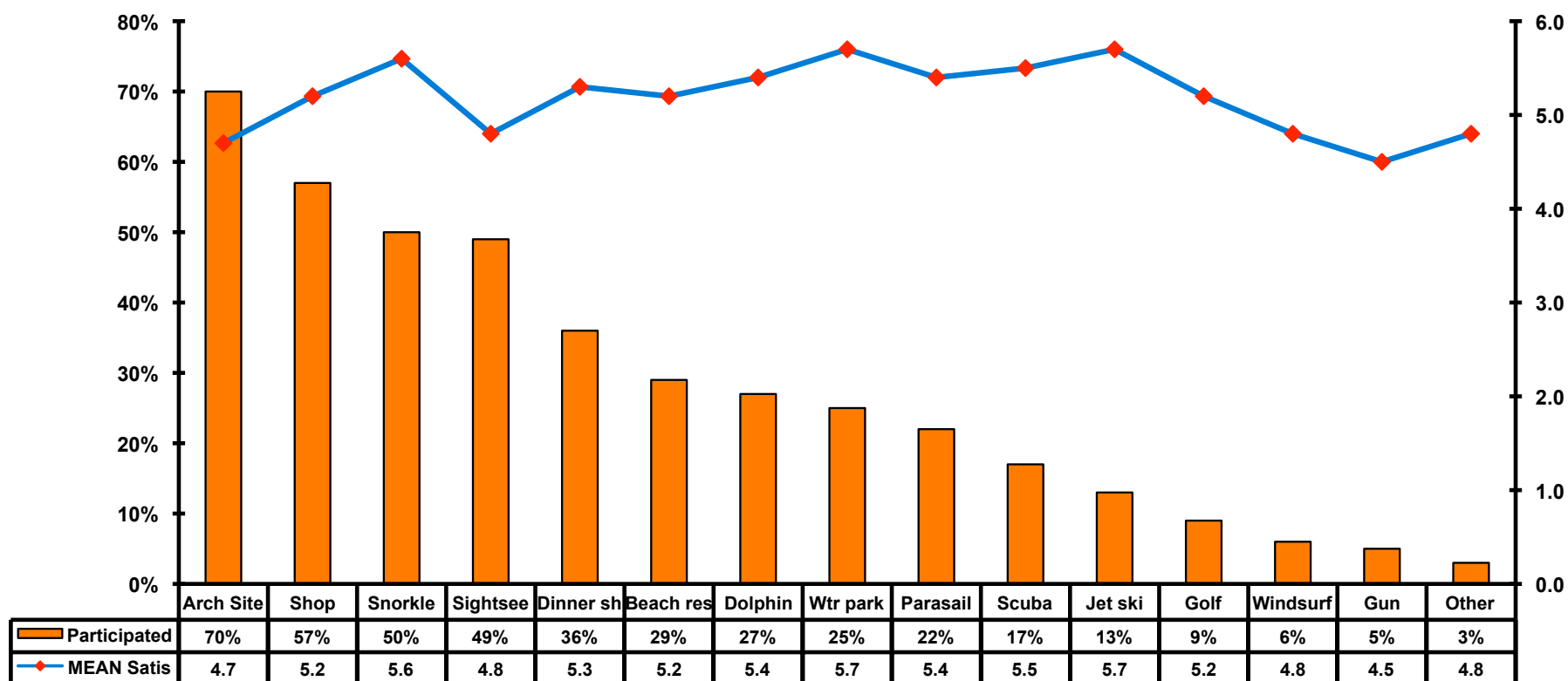
Night Tours Satisfaction

7pt Rating Scale

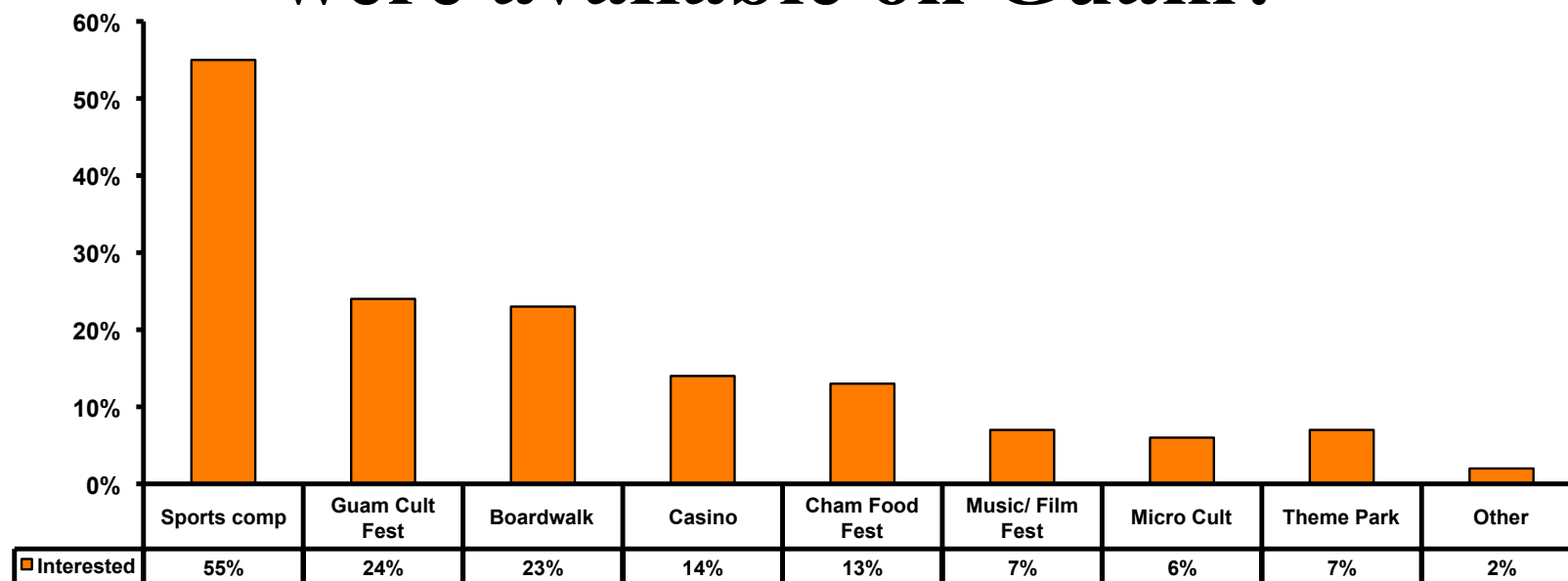
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 28%	Score of 6 to 7 = 23%
Score of 4 to 5 = 56%	Score of 4 to 5 = 57%
Score 1 to 3 = 17%	Score 1 to 3 = 20%
MEAN = 4.6	MEAN = 4.4

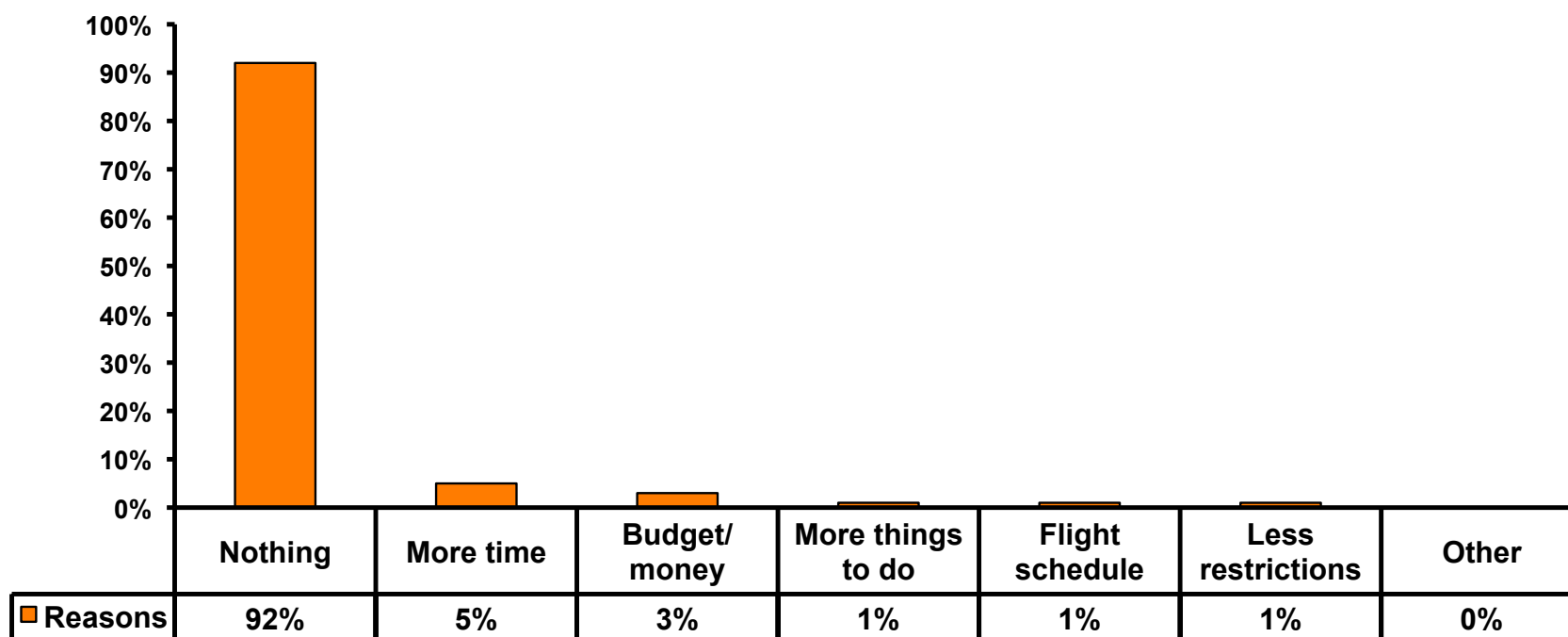
Satisfaction with Other Activities



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



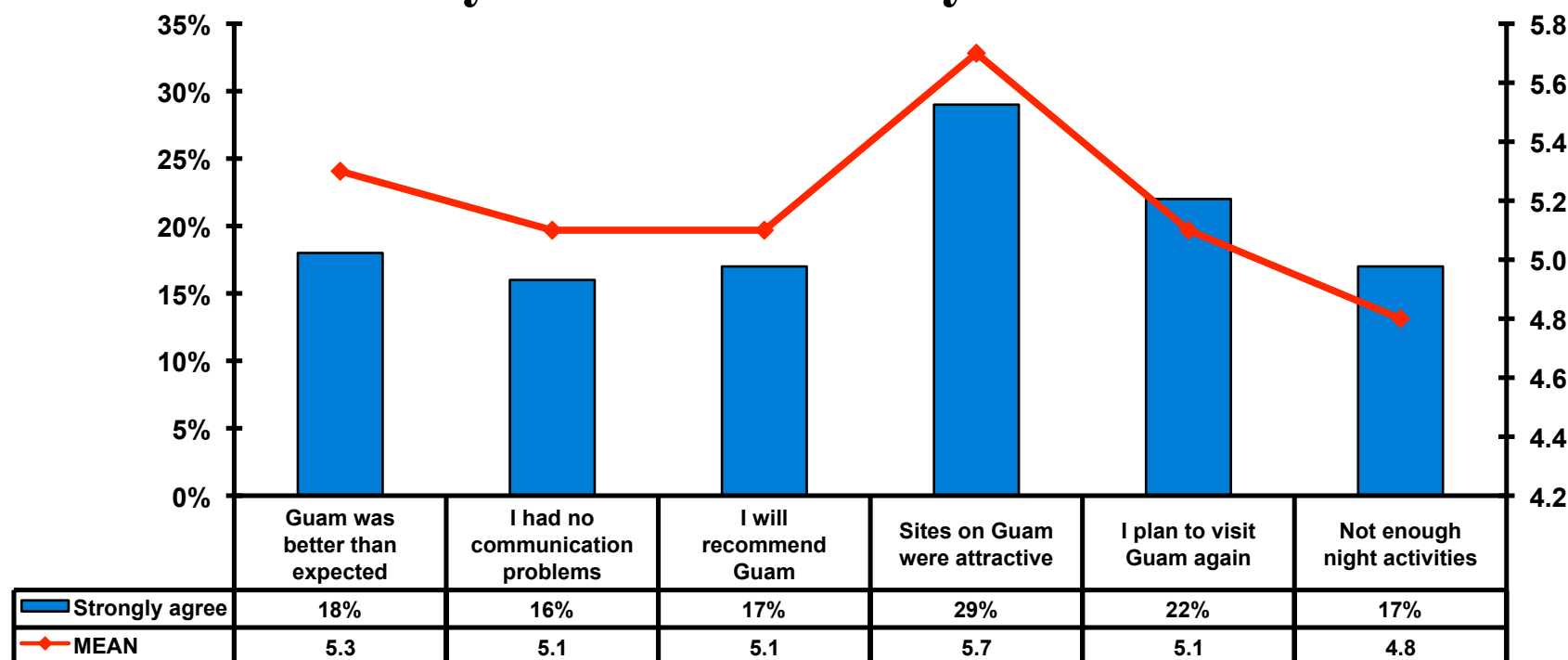
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

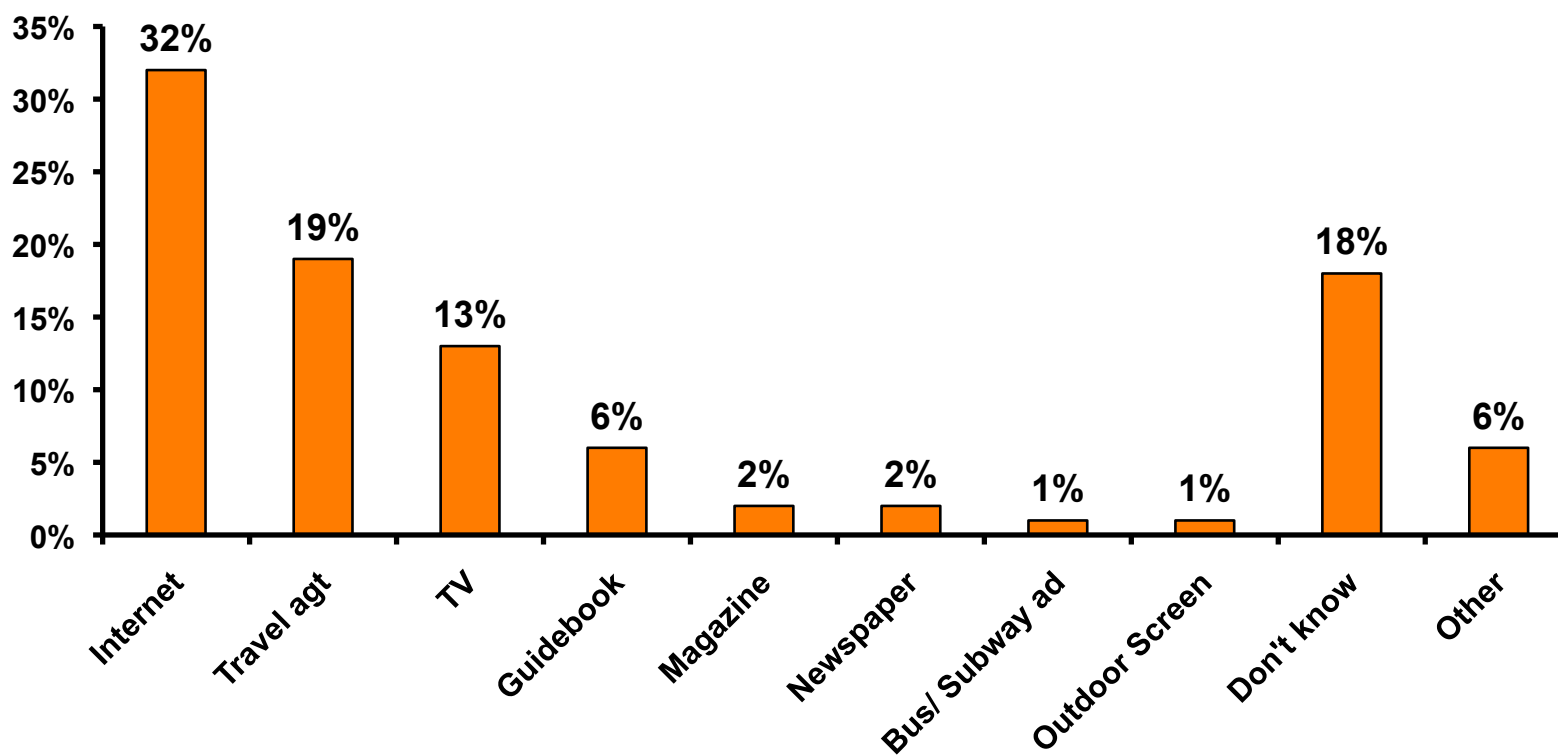
7=Very Satisfied/ 1=Very Dissatisfied



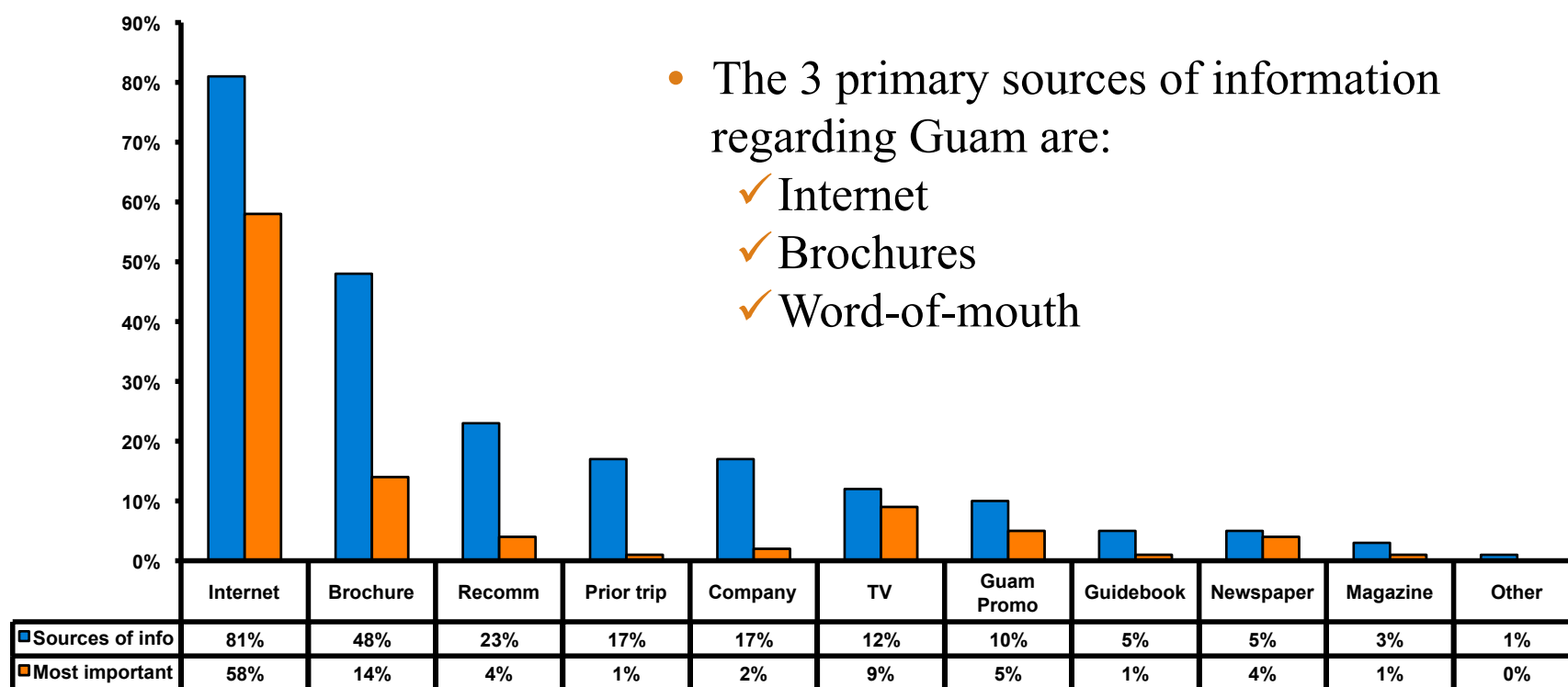
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

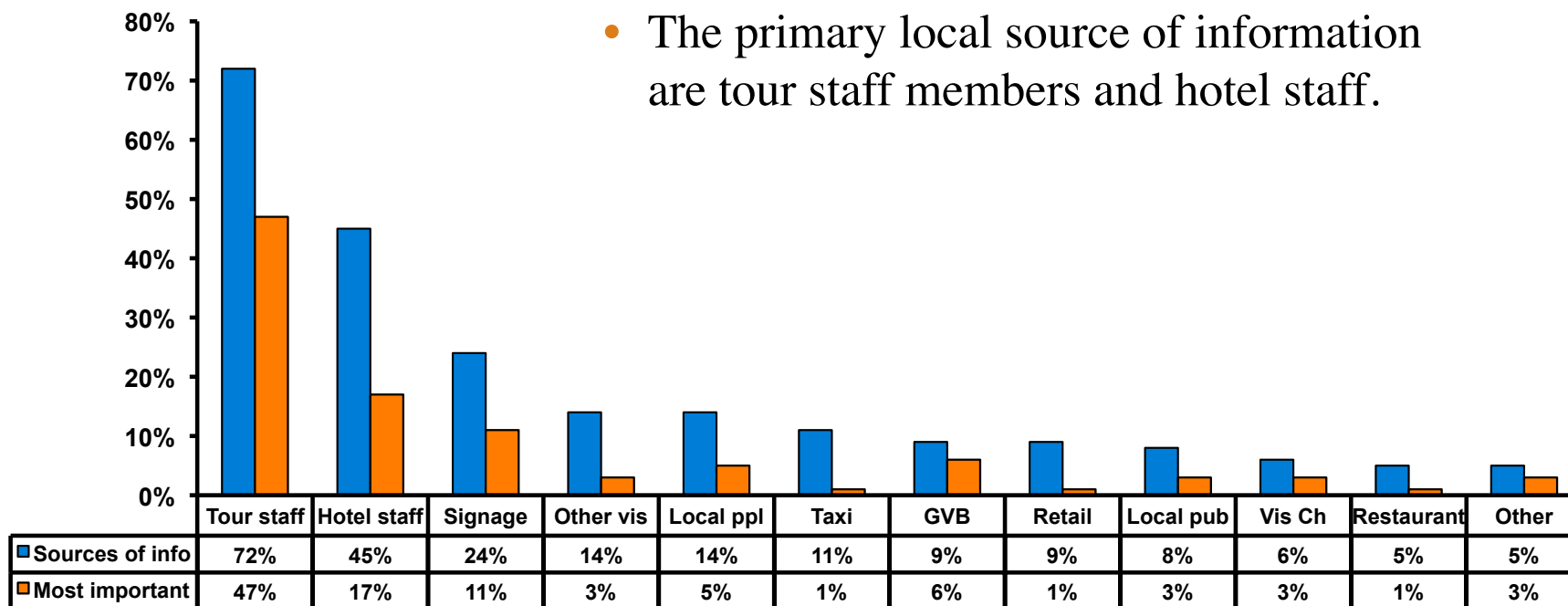


Sources of Information Pre-arrival



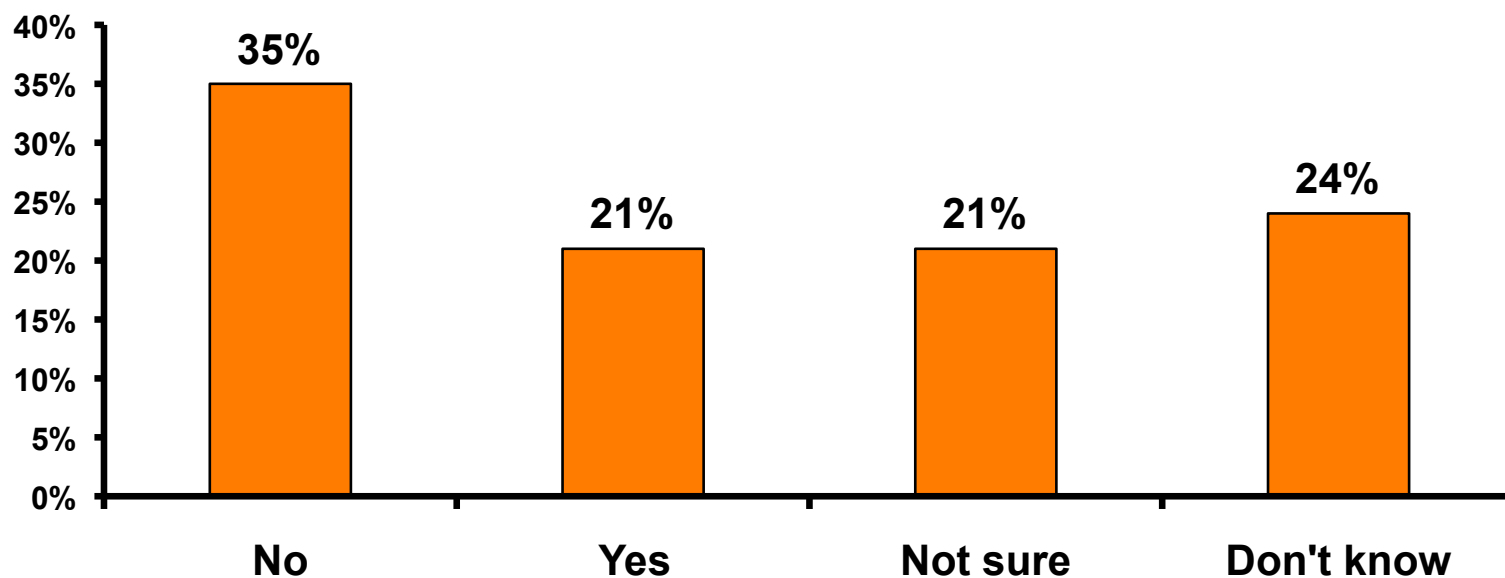
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

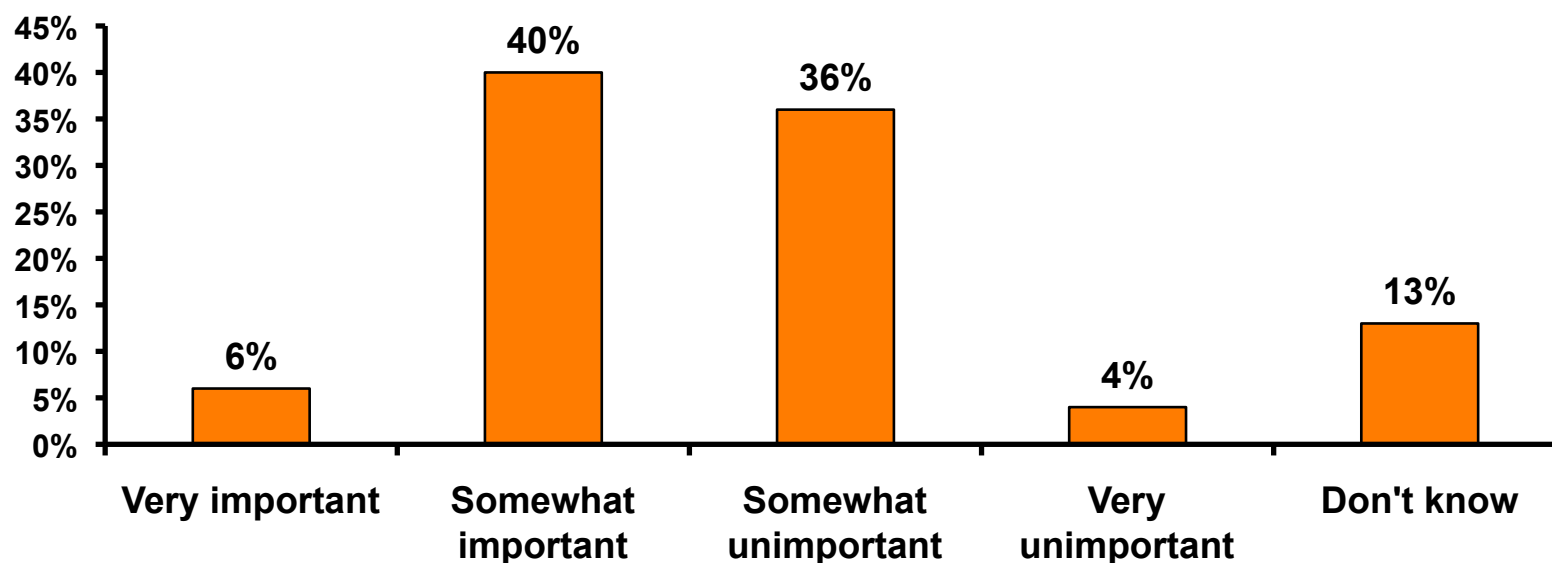
Good time to spend money on travel outside of Korea - Overall



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	38%	37%	24%	35%	36%	35%	36%	32%	22%
	Yes	18%	20%	27%	20%	15%	22%	19%	25%	11%
	Not sure	17%	22%	25%	25%	18%	19%	20%	28%	33%
	Do not know	27%	22%	24%	20%	31%	24%	26%	15%	33%
Total	Count	103	172	59	20	39	127	97	75	9

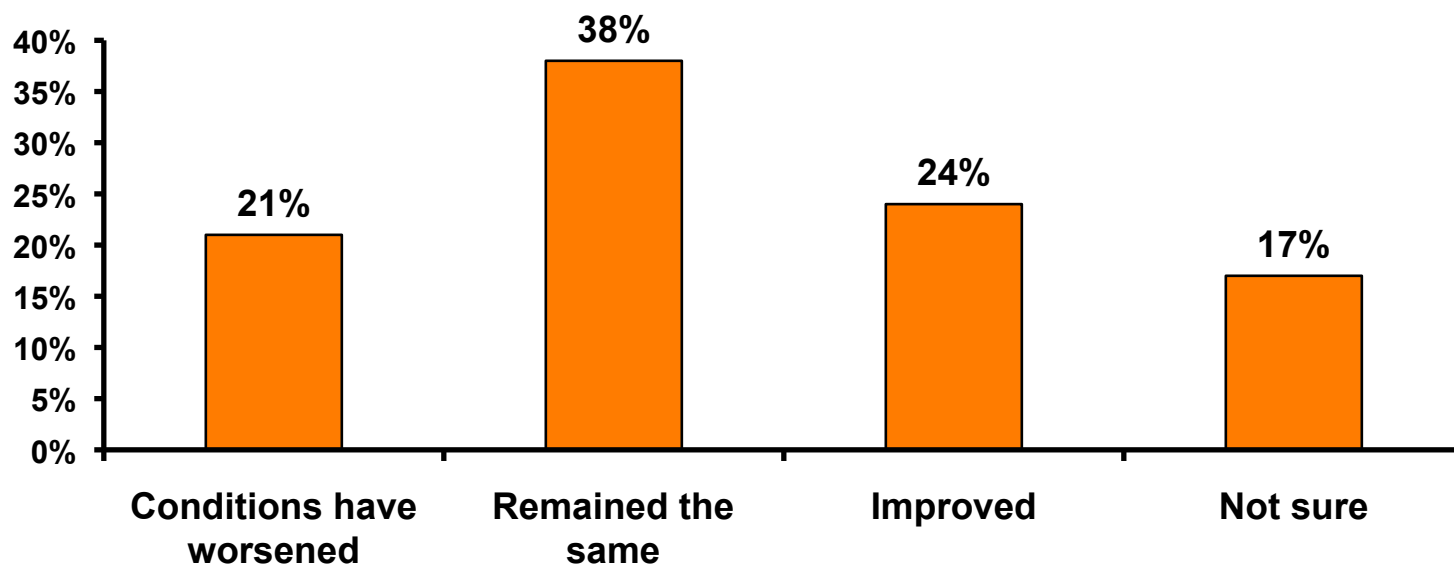
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.23	Very unimportant	5%	4%	3%	5%	8%	5%	5%	1%	
	Somewhat unimportant	31%	41%	36%	20%	28%	32%	41%	43%	44%
	Somewhat important	47%	35%	42%	45%	38%	44%	34%	40%	44%
	Very important	2%	7%	7%	20%	5%	6%	3%	11%	
	Don't know	16%	12%	12%	10%	21%	13%	16%	5%	11%
Total	Count	103	172	59	20	39	127	97	75	9

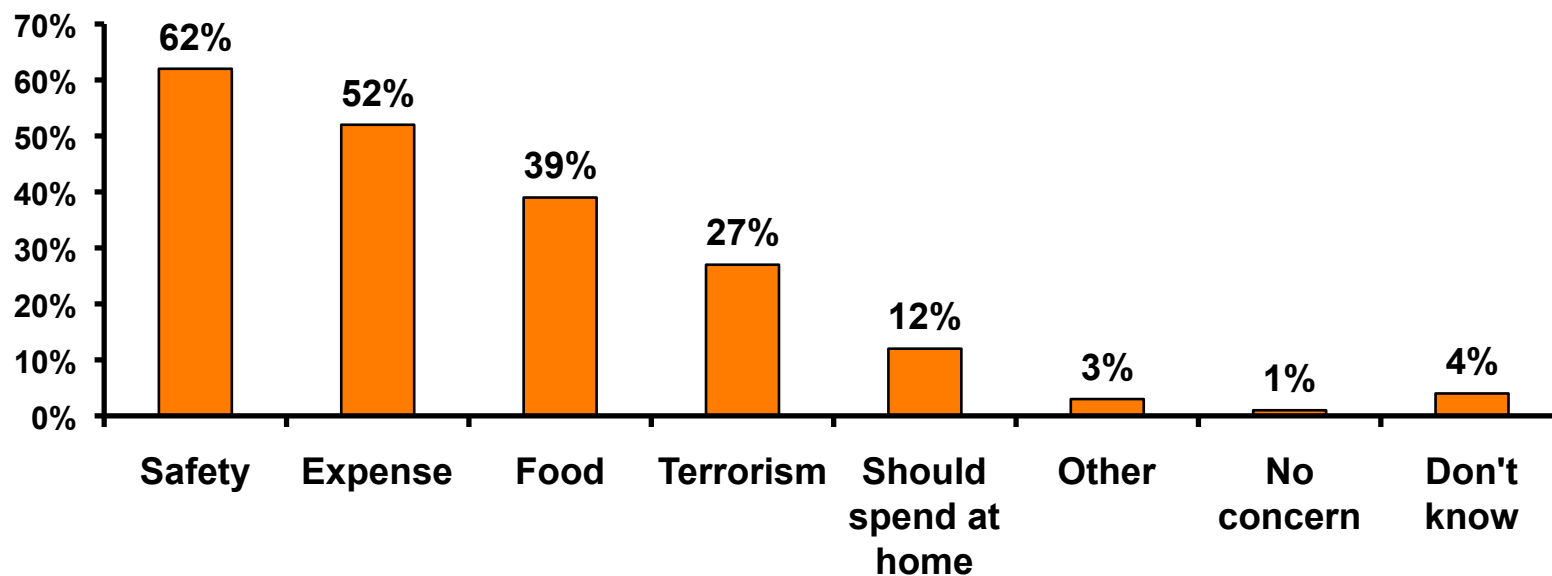
Rating Korean Economy Compared to 12 months ago



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	24%	19%	17%	25%	23%	26%	18%	15%	22%
	Conditions have remained the same	31%	44%	36%	30%	28%	34%	45%	41%	33%
	Conditions have improved	23%	23%	28%	30%	15%	22%	21%	39%	11%
	Do not know	21%	14%	19%	15%	33%	17%	17%	5%	33%
Total	Count	103	171	58	20	39	126	96	75	9

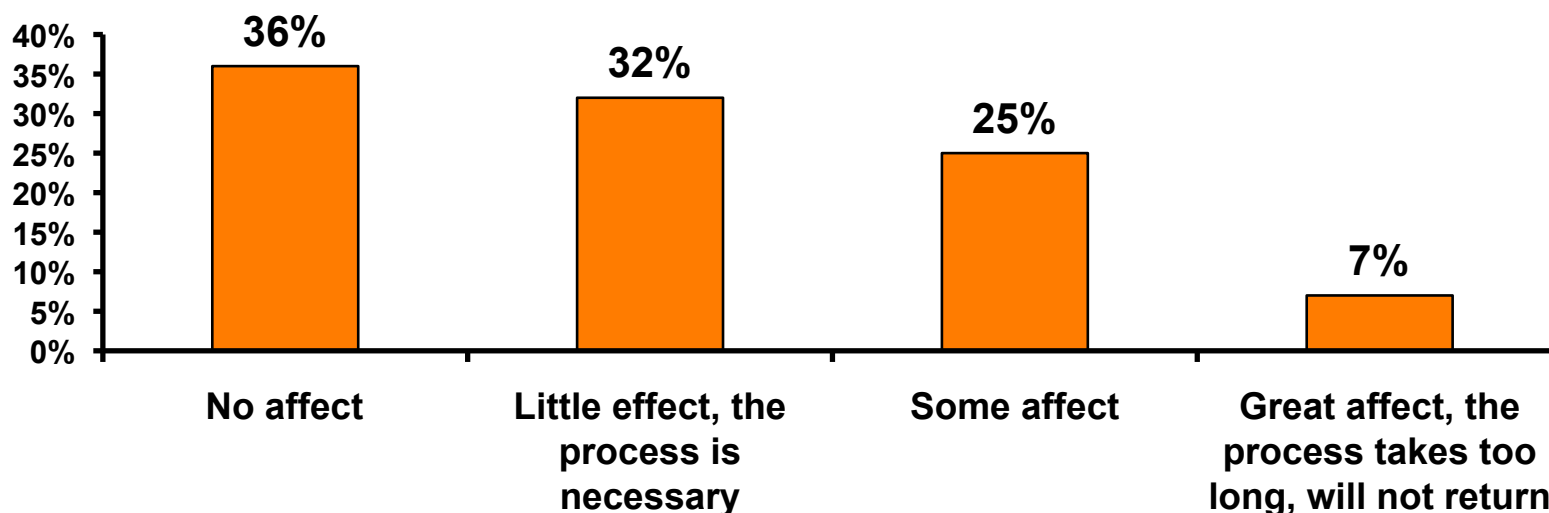
Concerns about travel outside of Korea - Overall



Concerns about 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.24	Safety at my destination	60%	61%	68%	65%	56%	62%	66%	65%	44%
	Expense	57%	54%	39%	45%	54%	52%	59%	47%	22%
	Food	42%	33%	53%	30%	38%	39%	41%	41%	
	Terrorism	40%	23%	20%	20%	33%	31%	22%	26%	22%
	Spending money abroad when it should be spent at home	10%	13%	10%	20%	13%	11%	12%	14%	11%
	Do not know	2%	2%	8%	15%	5%	3%	3%	3%	11%
	Other	3%	4%	2%	5%	3%	2%	4%	3%	11%
	No concerns	1%	1%	2%			1%	1%	1%	
Total	Cases	103	171	59	20	39	127	97	74	9

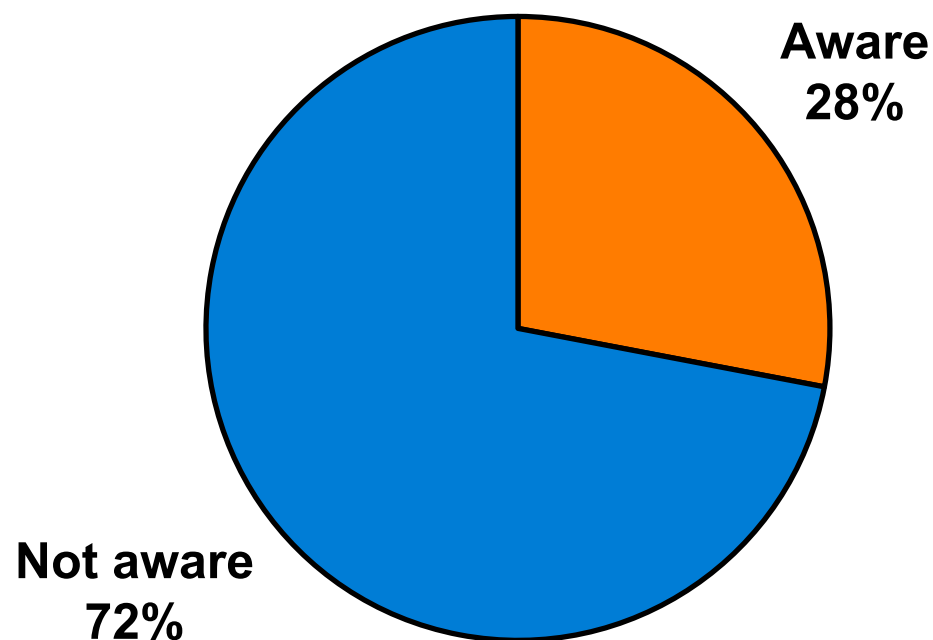
Security Screening/ Immigration Process at Guam International Airport



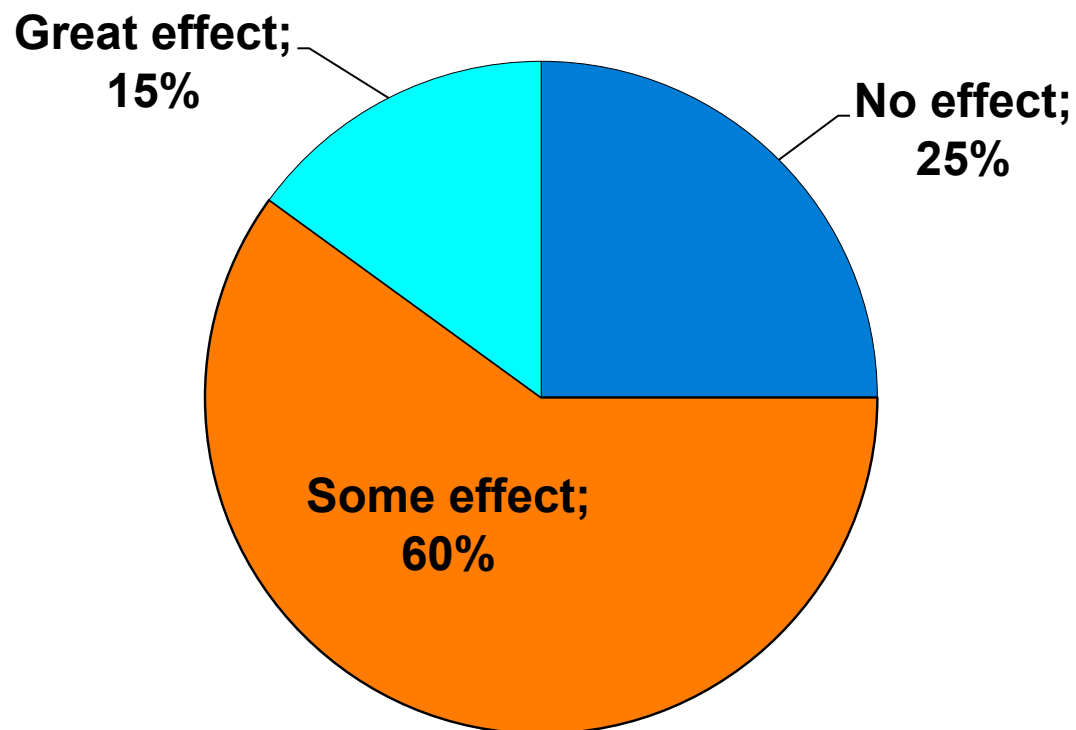
Hotel Room Surcharge by \$3.00 Per day/ Per room to help build Guam Museum

- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **8%**
- Neutral (Score 4-5) – **42%**
- Disagree (Score 1-3) – **50%**

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



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



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

