



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FEBRUARY 2010



Prepared by: QMark Research

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Background & Methodology

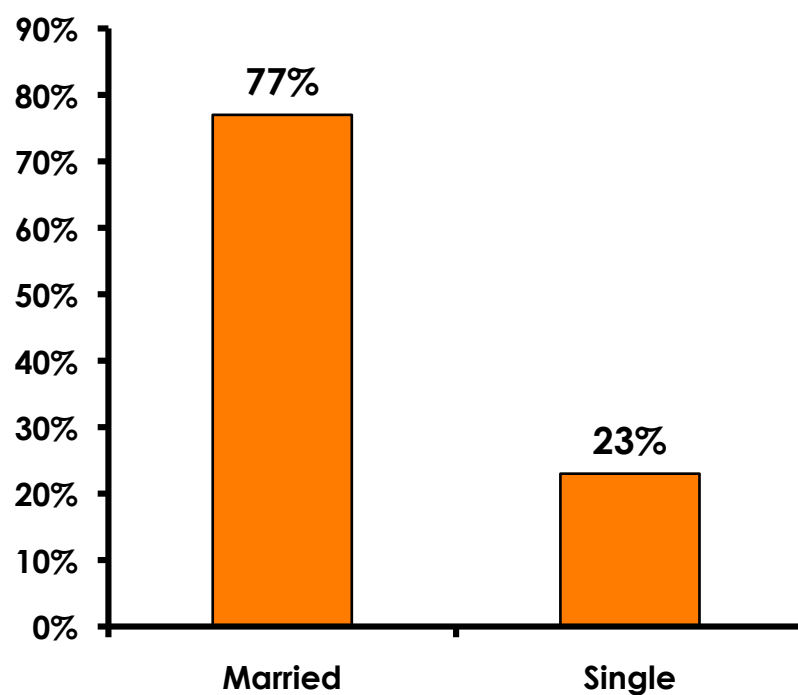
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean 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 **352** 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.

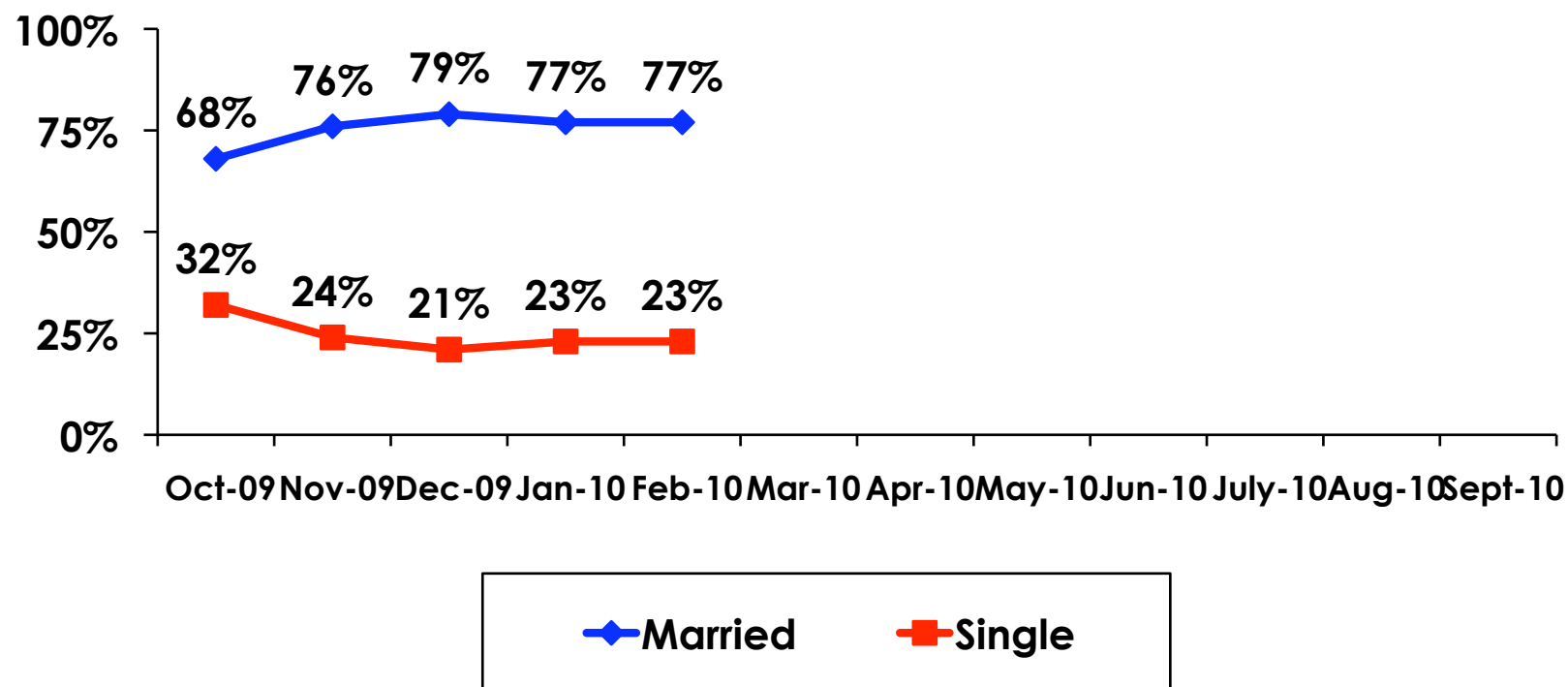
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

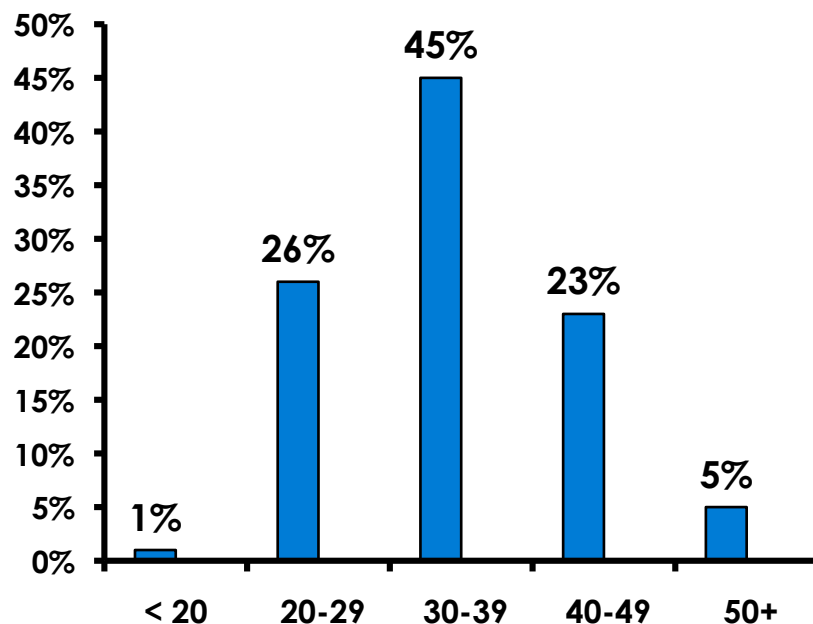


- A majority of visitors are married.

Marital Statis

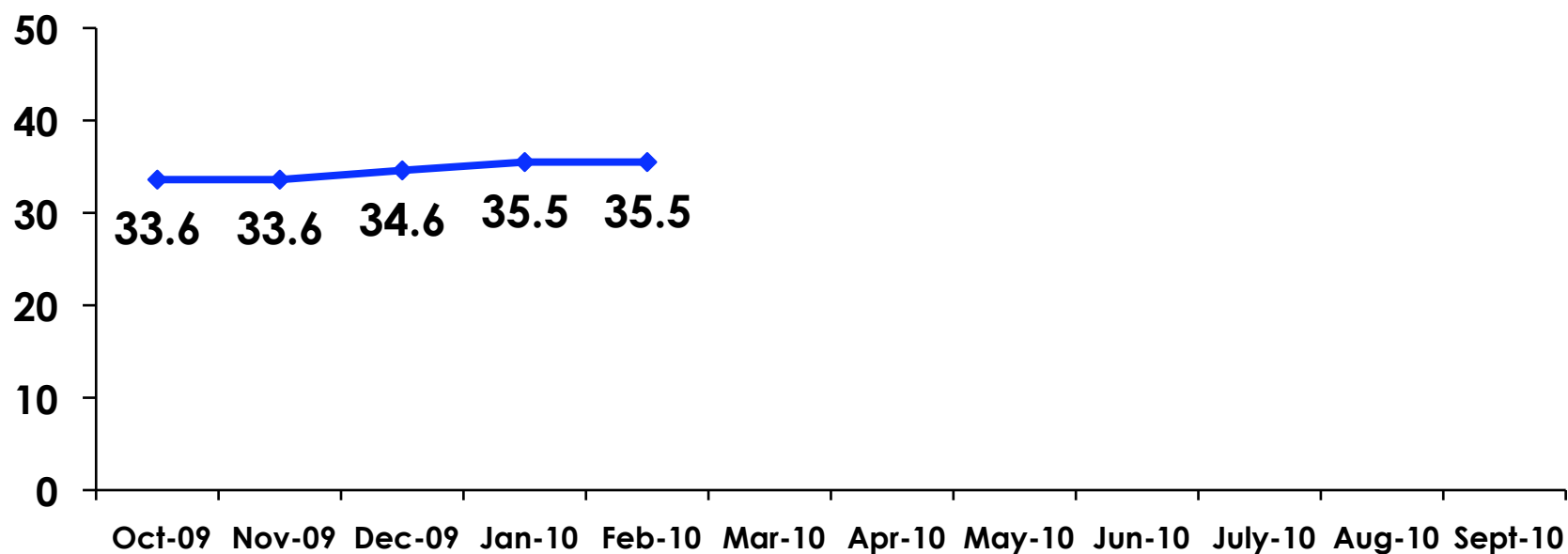


Age - Overall

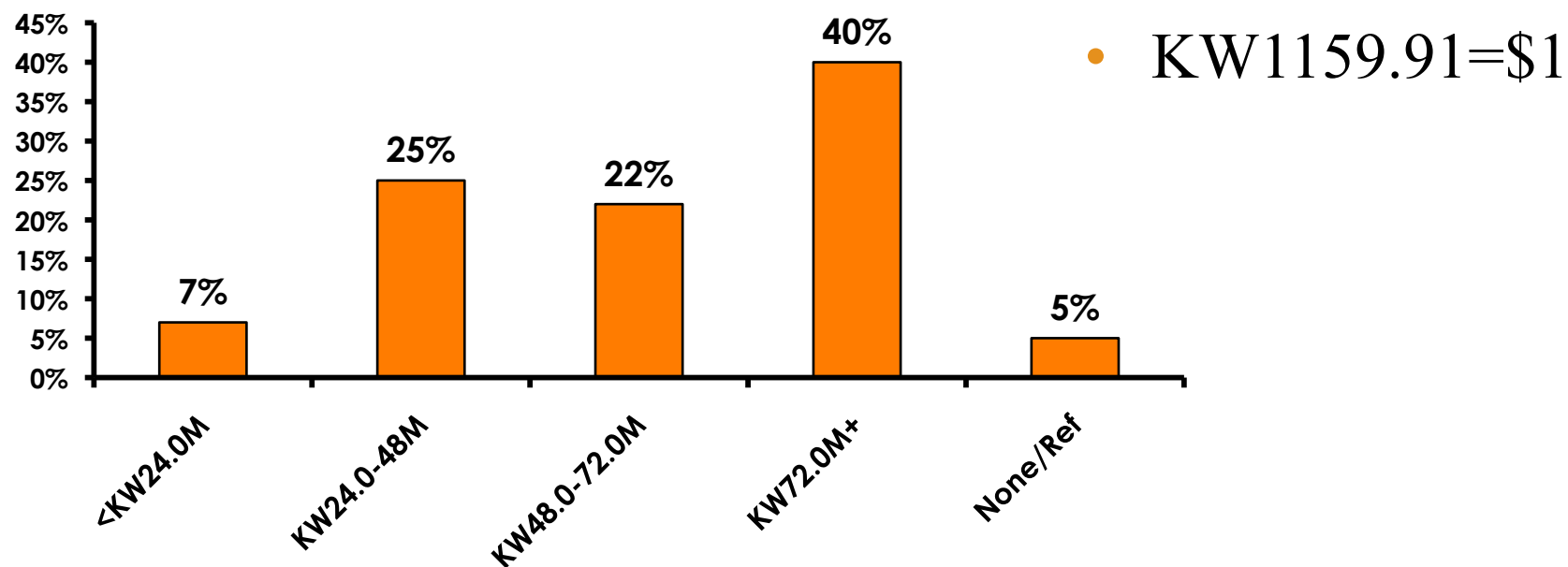


- The average age of the respondents is 35.5 years of age.

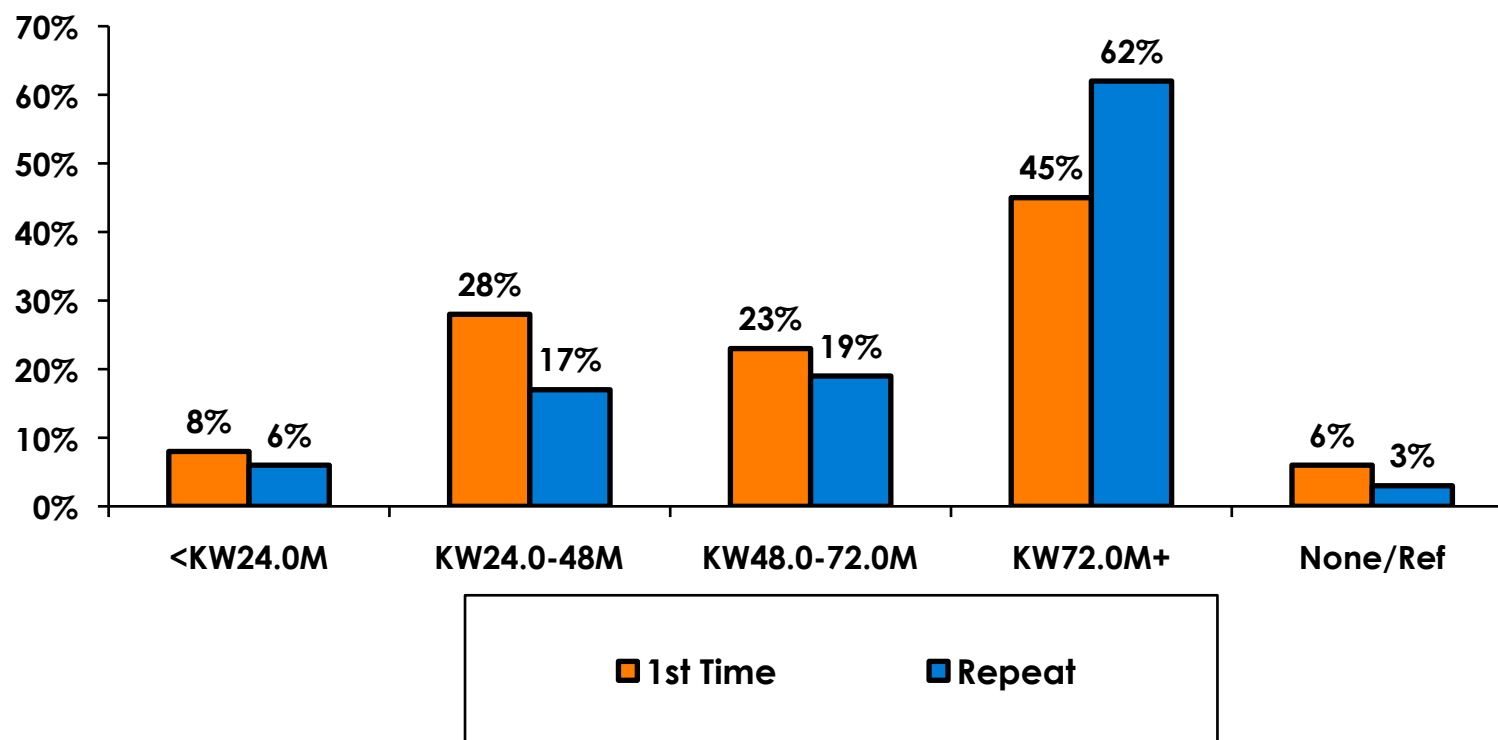
Average Age



Personal Income



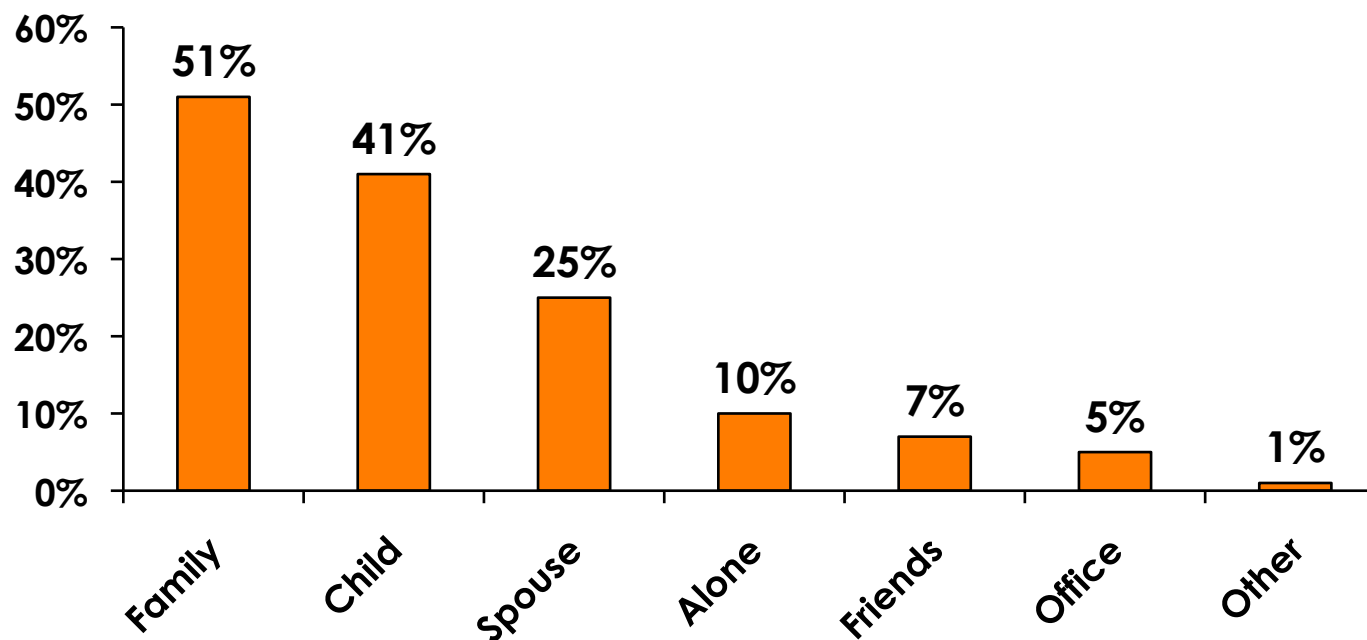
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	25	12	13		16	7	2	
			7%	7%	8%		18%	4%	3%	
	KW24.0M-KW48.0M	Count	86	34	52		27	44	12	3
			25%	20%	31%		31%	28%	15%	17%
	KW48.0M-KW72.0M	Count	77	48	29		12	39	20	6
			23%	28%	17%		14%	25%	25%	33%
	KW72.0M+	Count	136	73	63	1	20	63	44	8
			40%	42%	38%	50%	23%	40%	56%	44%
	Refused	Count	18	7	11	1	12	3	1	1
			5%	4%	7%	50%	14%	2%	1%	6%
Total	Count	342	174	168	2	87	156	79	18	

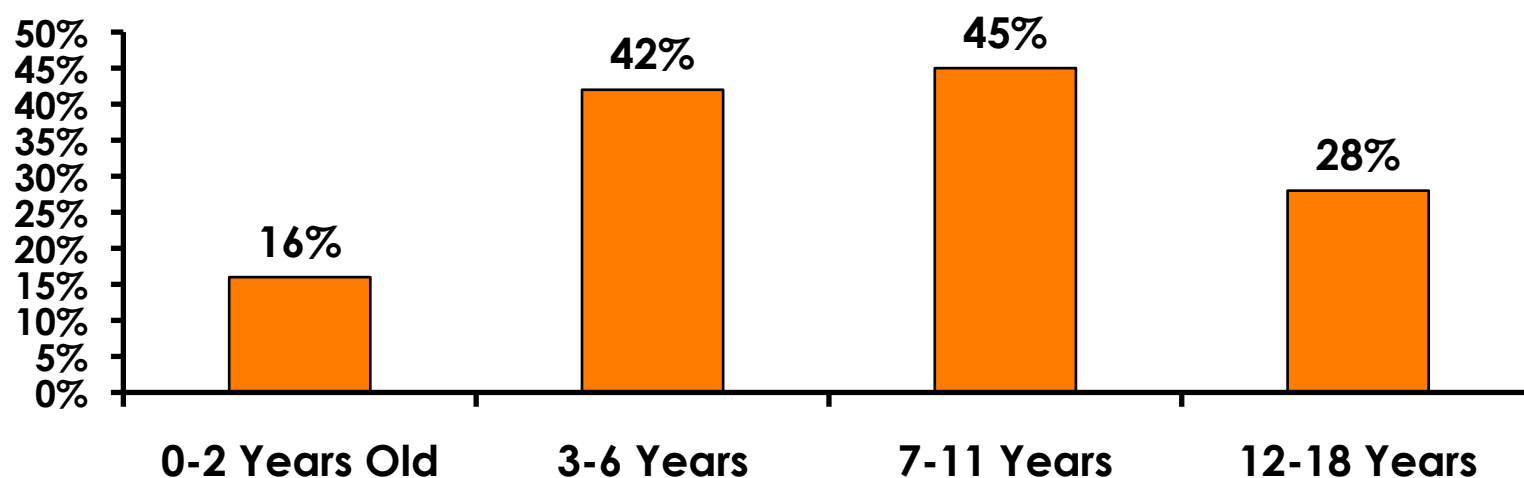
Travel Companions



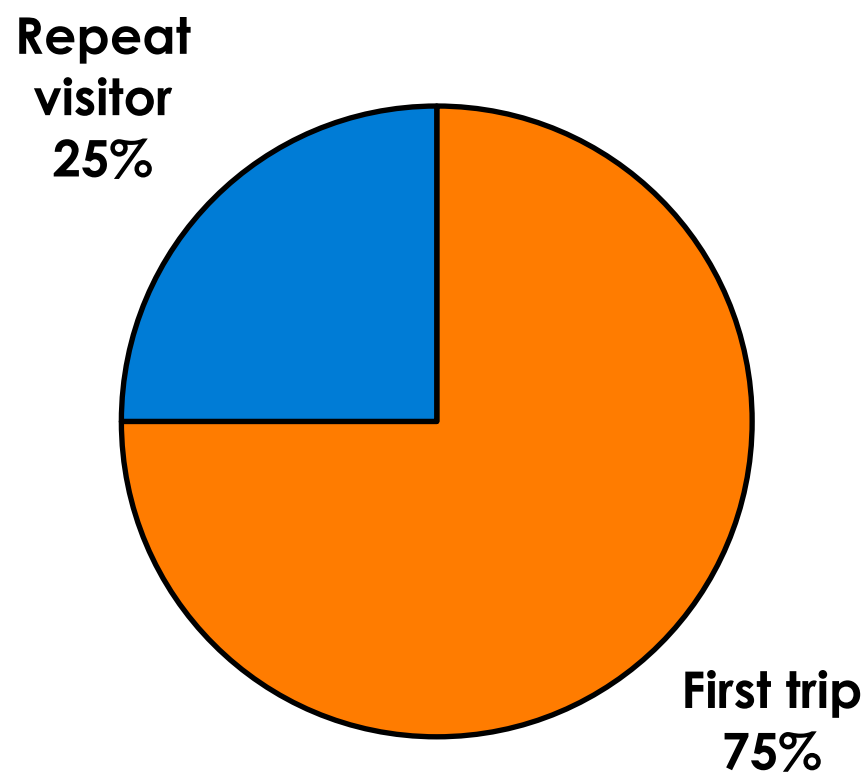
Number of Children Travel Party

N=144 total respondents traveling with children.

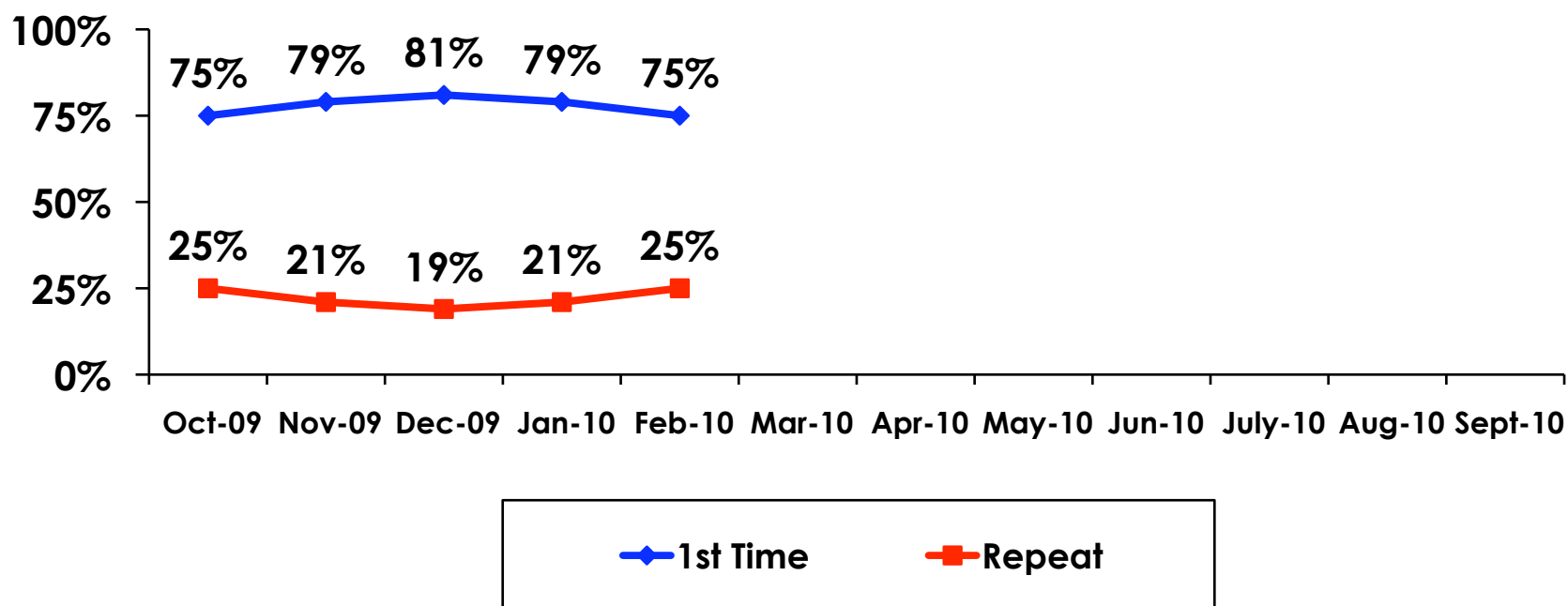
(Of those N=144 respondents, there is a total of 223 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



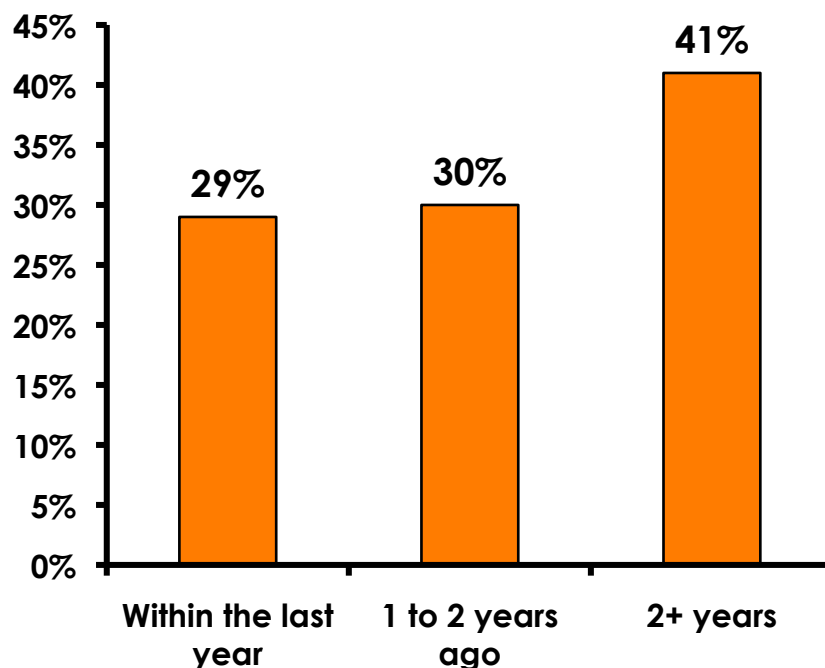
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	177	128	49
			50%	48%	56%
	Female	Count	175	136	39
			50%	52%	44%
Total	Count		352	264	88
AGE	<20	Count	2	2	
			1%	1%	
	20-29	Count	92	75	17
			26%	28%	19%
	30-39	Count	157	118	39
			45%	45%	44%
	40-49	Count	82	54	28
			23%	20%	32%
	50+	Count	19	15	4
			5%	6%	5%
Total	Count		352	264	88

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

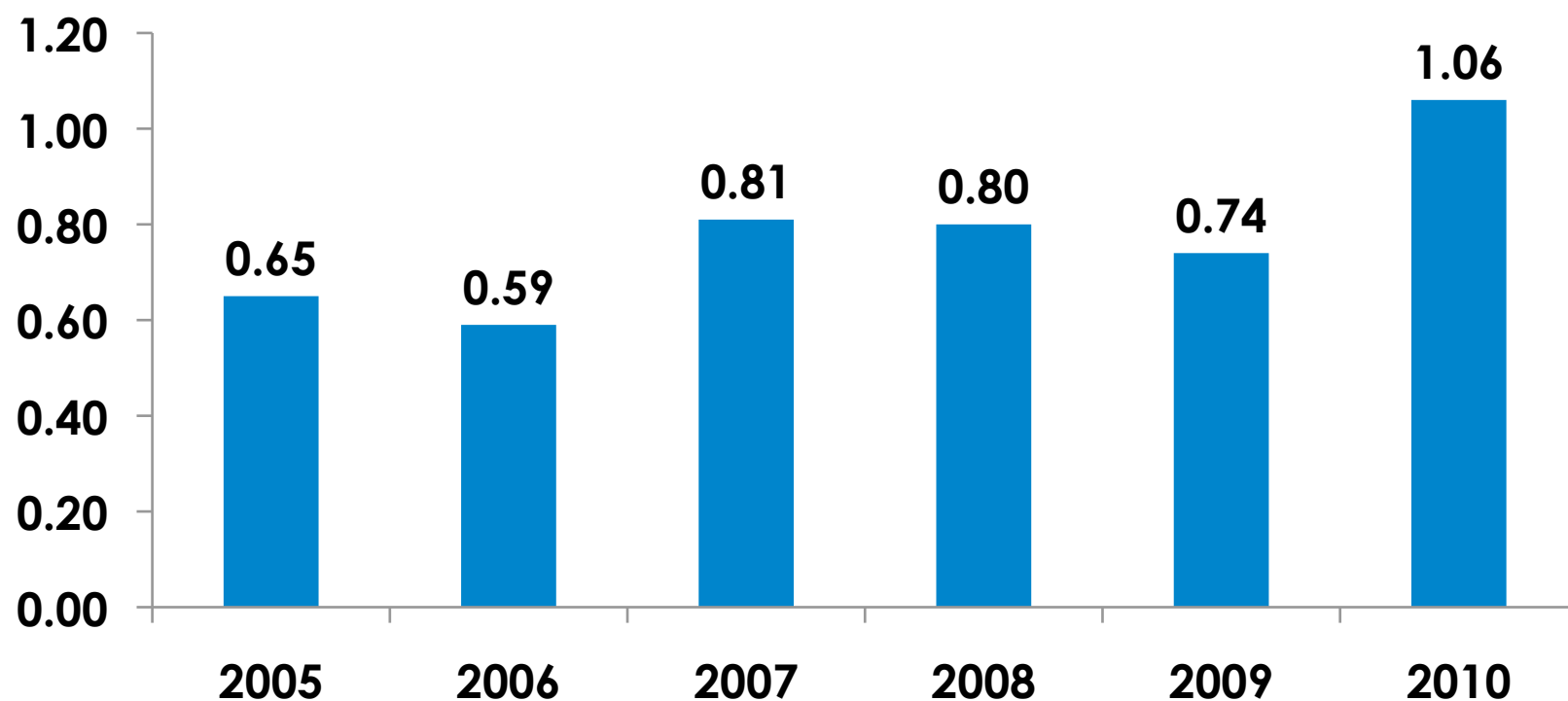
Repeat Visitors Last Trip

n = 83

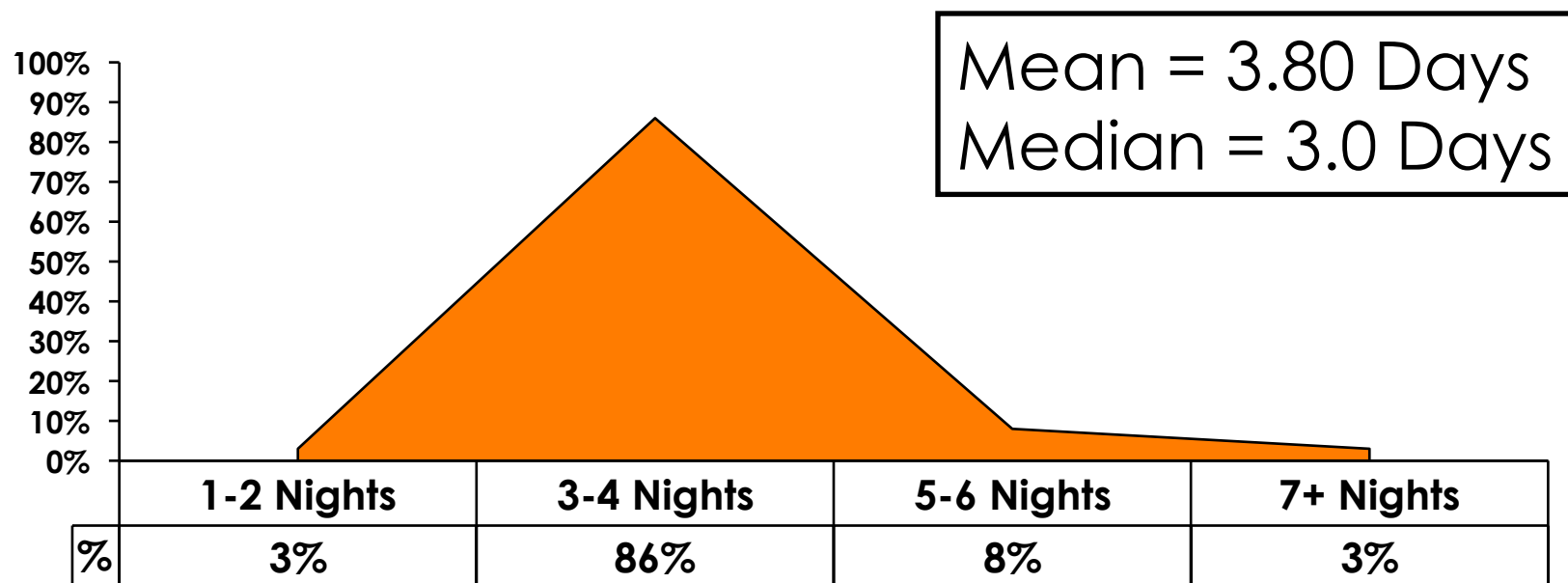


- The average repeat visitor has been to Guam 2.8 times.
- A majority of the repeat visitors have been to Guam within the last 2 years.

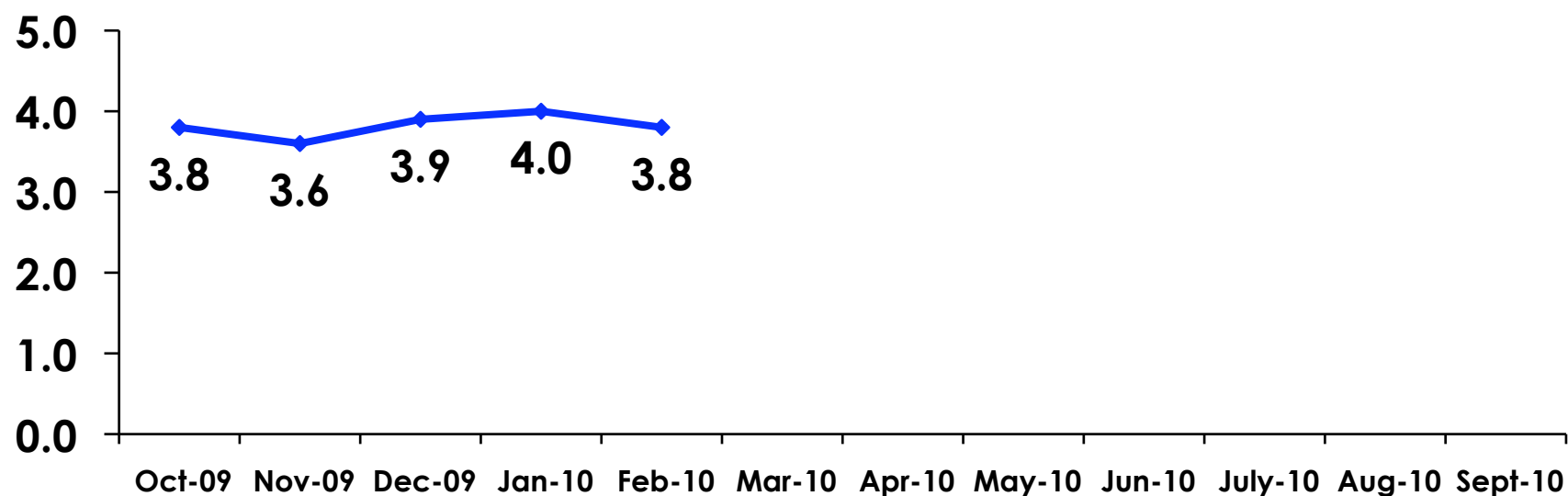
Average Number Overnight Trips (2004-2010) (2 nights or more)



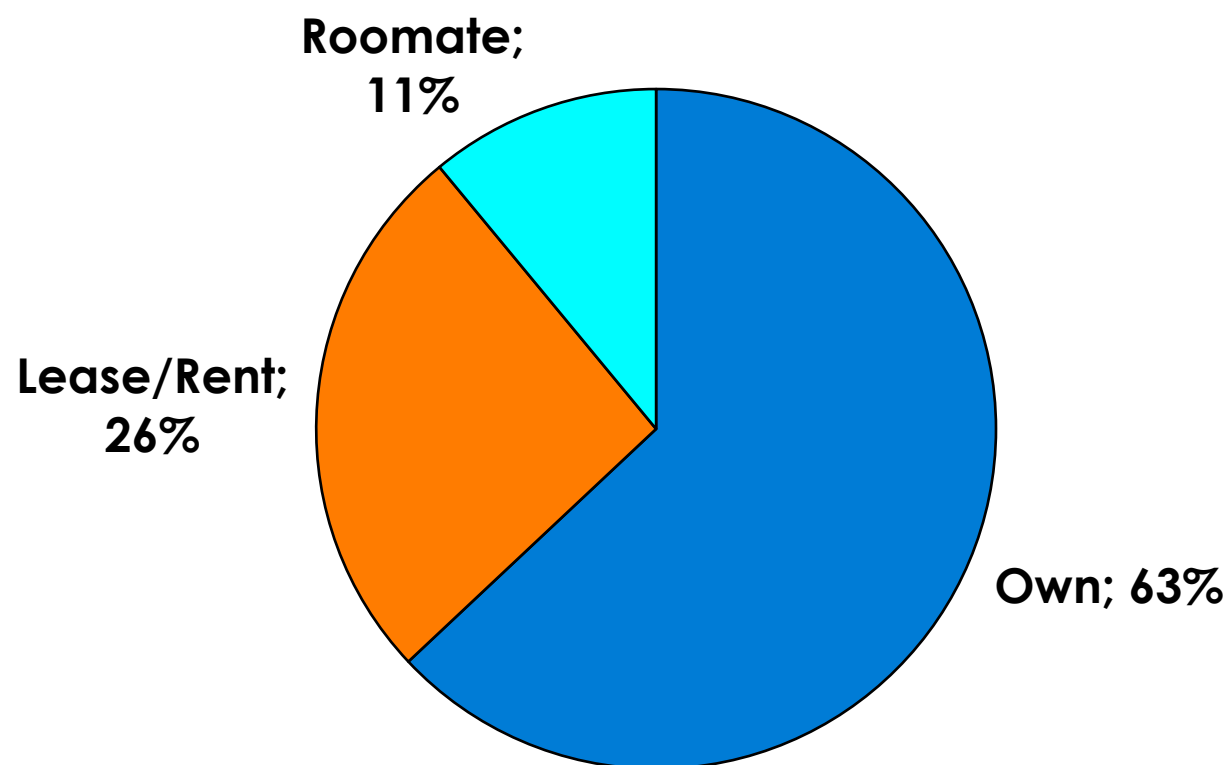
Length of Stay



Average Length of Stay



Living Accommodations

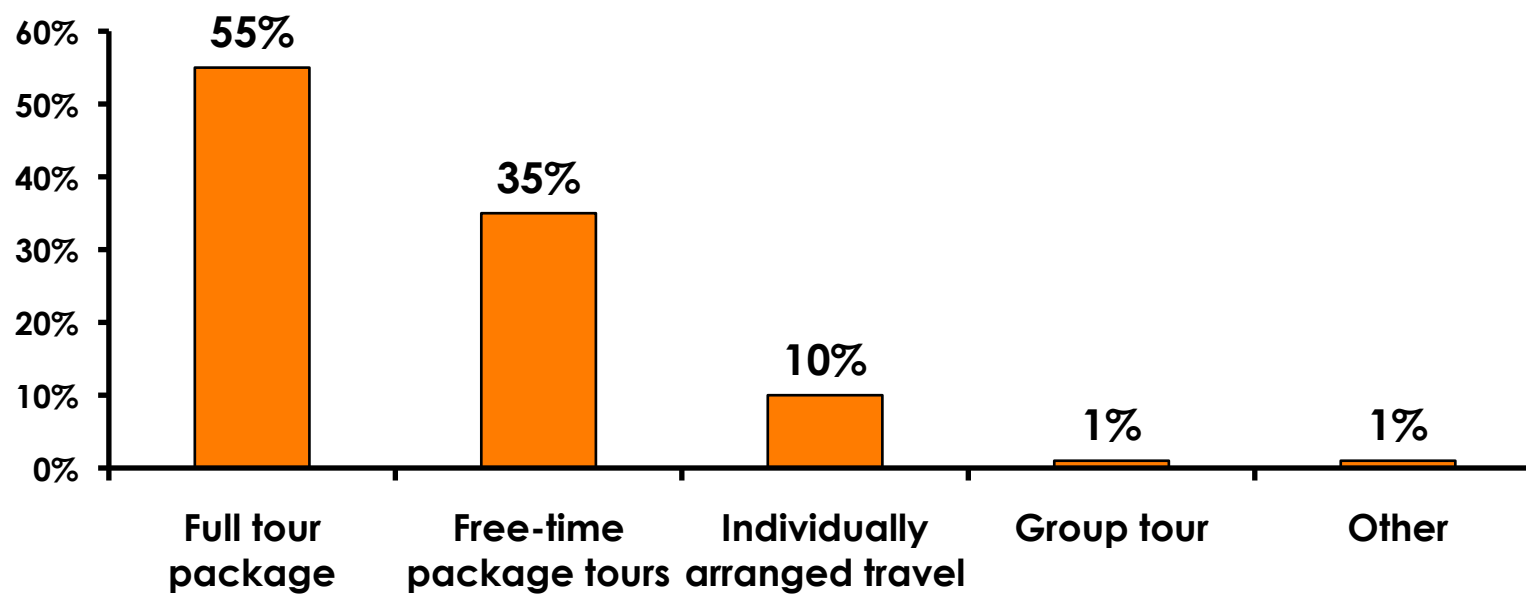


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	22%	29%	28%	26%	19%	
	Self-employed	17%	4%	11%	17%	23%	11%
	Prof/Specialist/Tech	15%	17%	13%	16%	17%	6%
	Homemaker	12%	4%	14%	9%	13%	17%
	Student	11%	13%	7%	1%	8%	61%
	Professor/Teacher	7%	13%	6%	12%	7%	
	Manager	3%		1%	3%	6%	
	Service worker	3%	8%	5%	3%	1%	
	Skilled worker	2%	4%	1%	7%		
	Other	2%		4%		2%	
	Unemployed	1%	4%	1%	1%	1%	6%
	Sales/Clerical	1%		2%		1%	
	Govt - Office/non-mgr	1%		2%	1%		
	Govt-Exec	1%		1%		1%	
	Retired	1%			3%	1%	
	Govt-Mgr	1%		2%			
	Free-lancer	1%		1%	1%		
	Judicial	0%	4%				
Total	Count	349	24	85	76	136	18

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

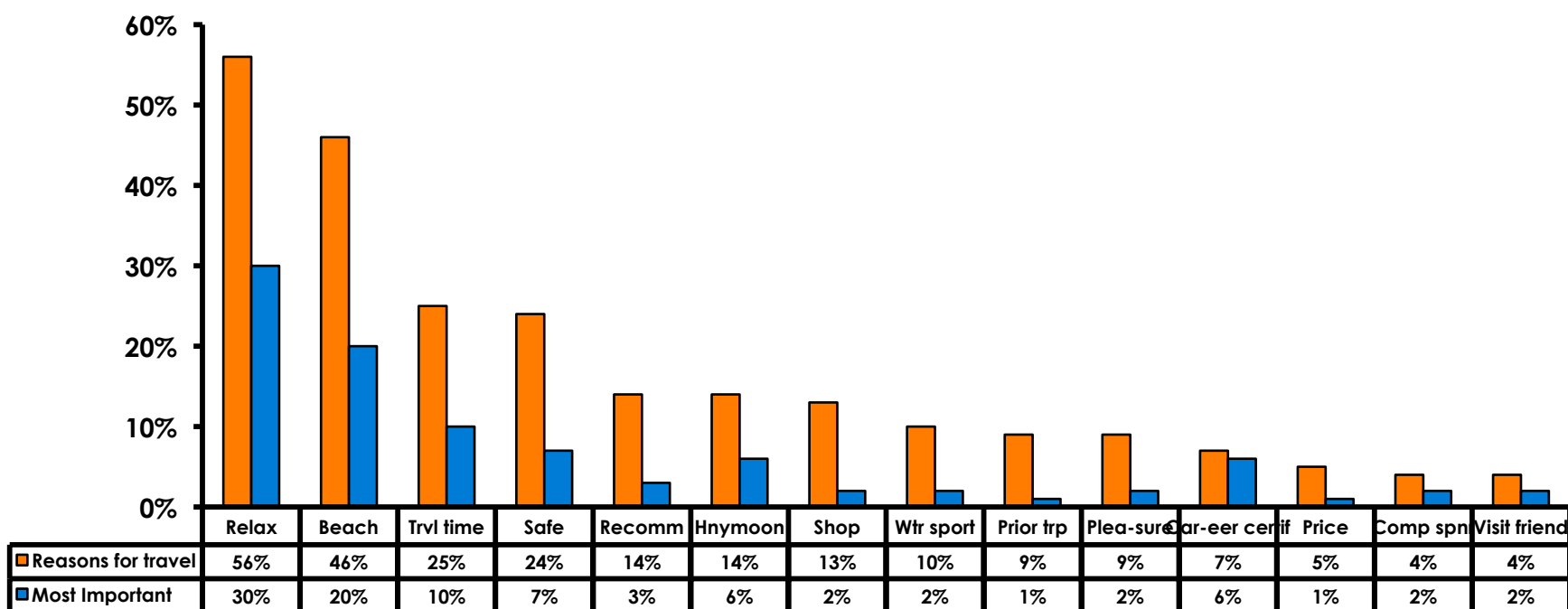


Accommodation by Income

Average length of stay: 3.80 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	54%	44%	48%	56%	61%	47%
	The Westin Resort Guam	9%	8%	6%	9%	10%	12%
	Sheraton Laguna Resort	7%	8%	15%	9%	2%	
	Hyatt Regency Guam	5%	8%	7%	5%	3%	
	Onward Beach Resort	4%	12%	5%	1%	4%	
	Hilton Guam Resort & Spa	3%		3%	4%	3%	
	Leo Palace Resort	3%		2%	3%	4%	
	Holiday Resort Guam	3%	4%	3%	3%	2%	6%
	Relatives, Friends, Home Stay	2%	8%	2%		2%	6%
	Ramada Suites Guam	2%	4%		3%	1%	6%
	Hotel Sane Fe	2%		1%	1%	3%	
	Outrigger Guam Resort	1%		1%	1%	1%	6%
	Ohana Bayview Hotel	1%			1%	1%	6%
	Guam Marriott Resort Hotel	1%			1%	1%	
	Royal Orchid Guam	1%			1%	1%	
	Condominium	1%		1%			6%
	Other	1%		2%			
	Guam Reef Hotel	0%			1%		
	Hotel Nikko Guam	0%	4%				
	Japan Plaza Hotel	0%		1%			
	Apartment	0%					6%
	Days Inn Tamuning	0%		1%			
	Fiesta Resort Guam	0%				1%	
	Total	Count	351	25	86	77	136

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	56%	100%	46%	59%	60%	63%	52%	61%
	Beautiful seas, beaches, tropical climate	46%	50%	39%	46%	52%	47%	39%	53%
	Short travel time	25%	50%	20%	31%	22%	16%	22%	29%
	It is a safe place to spend a vacation	24%		14%	29%	27%	26%	18%	30%
	Recommendation of friend, relative, travel agency	14%		13%	17%	12%	11%	14%	15%
	Honeymoon	14%		30%	12%	2%		15%	13%
	Shopping	13%		15%	18%	5%	5%	7%	19%
	Water sports	10%		7%	15%	5%	5%	10%	9%
	A previous visit	9%		4%	11%	12%		9%	9%
	Pleasure	9%		11%	8%	7%	11%	5%	12%
	Career certification or testing	7%		18%	5%	1%		10%	5%
	Price of the tour package	5%		7%	5%	4%		5%	5%
	To visit friends or relatives	4%		3%	3%	5%	11%	7%	1%
	My company sponsored me	4%		2%	6%	2%		3%	5%
	To golf	3%		1%	3%	2%	26%	5%	2%
	Company or Business trip	3%		1%	2%	6%	11%	6%	1%
	SCUBA diving	2%		2%	2%	1%	5%	2%	2%
	Promotional materials from GVB	2%		1%	2%	2%	5%	2%	2%
	Other	2%		2%	2%		11%	2%	2%
	Organized Sporting Activity	1%		2%	1%	1%		2%	1%
	To get married or Attend wedding	1%			1%	1%		1%	1%
	Special promotion	0%			1%			1%	
Total	Cases	352	2	92	157	82	19	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	56%	44%	41%	62%	65%	50%
	Beautiful seas, beaches, tropical climate	46%	28%	44%	48%	51%	28%
	Short travel time	25%	12%	26%	18%	36%	6%
	It is a safe place to spend a vacation	24%	20%	23%	23%	28%	11%
	Recommendation of friend, relative, travel agency	14%	20%	12%	19%	10%	17%
	Honeymoon	14%	32%	21%	13%	6%	22%
	Shopping	13%	16%	15%	8%	15%	17%
	Water sports	10%	8%	12%	8%	10%	17%
	A previous visit	9%	12%	5%	6%	14%	6%
	Pleasure	9%	12%	5%	5%	12%	11%
	Career certification or testing	7%	4%	9%	5%	4%	33%
	Price of the tour package	5%	8%	6%	4%	4%	
	To visit friends or relatives	4%	4%	6%	3%	4%	6%
	My company sponsored me	4%	4%	9%	3%	1%	
	To golf	3%		1%	4%	5%	
	Company or Business trip	3%	4%	2%	6%	2%	
	SCUBA diving	2%	4%	3%	1%	1%	
	Promotional materials from GVB	2%		3%	1%	1%	6%
	Other	2%		1%	4%	2%	
	Organized Sporting Activity	1%	4%			2%	
	To get married or Attend wedding	1%		2%		1%	
	Special promotion	0%				1%	
Total	Cases	352	25	86	77	136	18

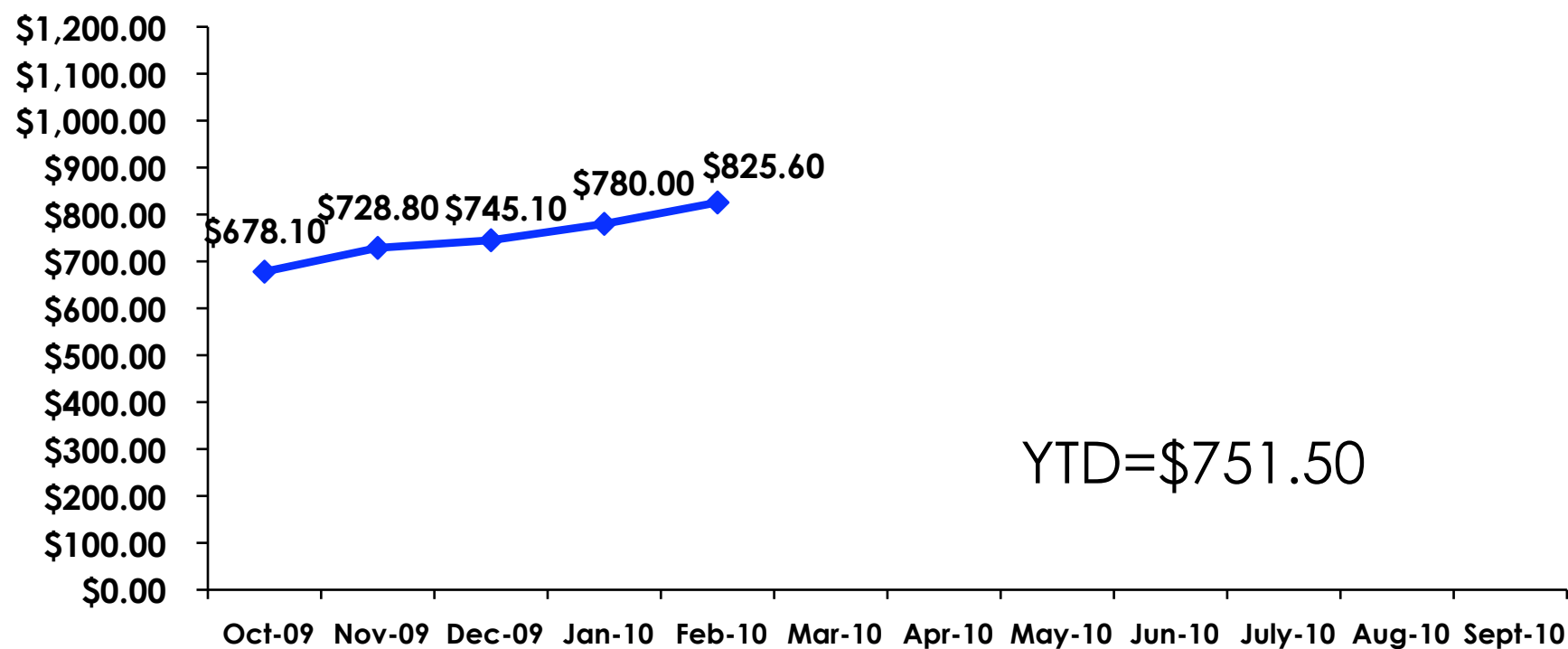
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1159.91/US\$1

- \$2,145.70 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$12,932 = maximum (highest amount recorded for the entire sample)
- \$825.60 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

KW1159.91=\$1

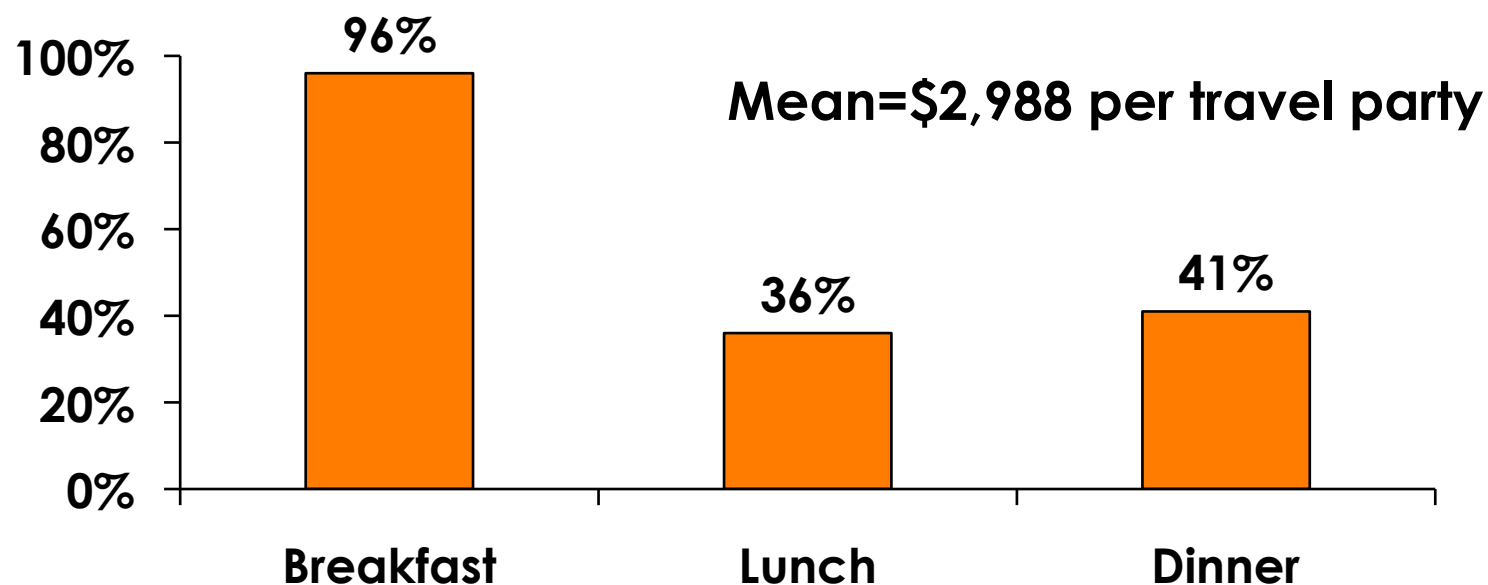
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,974
Air & Accommodation w/ daily meal package	\$2,988
Air only	\$823
Accommodation only	\$258
Accommodation w/ daily meal only	\$810
Food & Beverages in Hotel	\$208
Ground transportation – Korea	\$51
Ground transportation – Guam	\$97
Optional tours/ activities	\$267
Other expenses	\$512
Total Prepaid	\$2,145

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

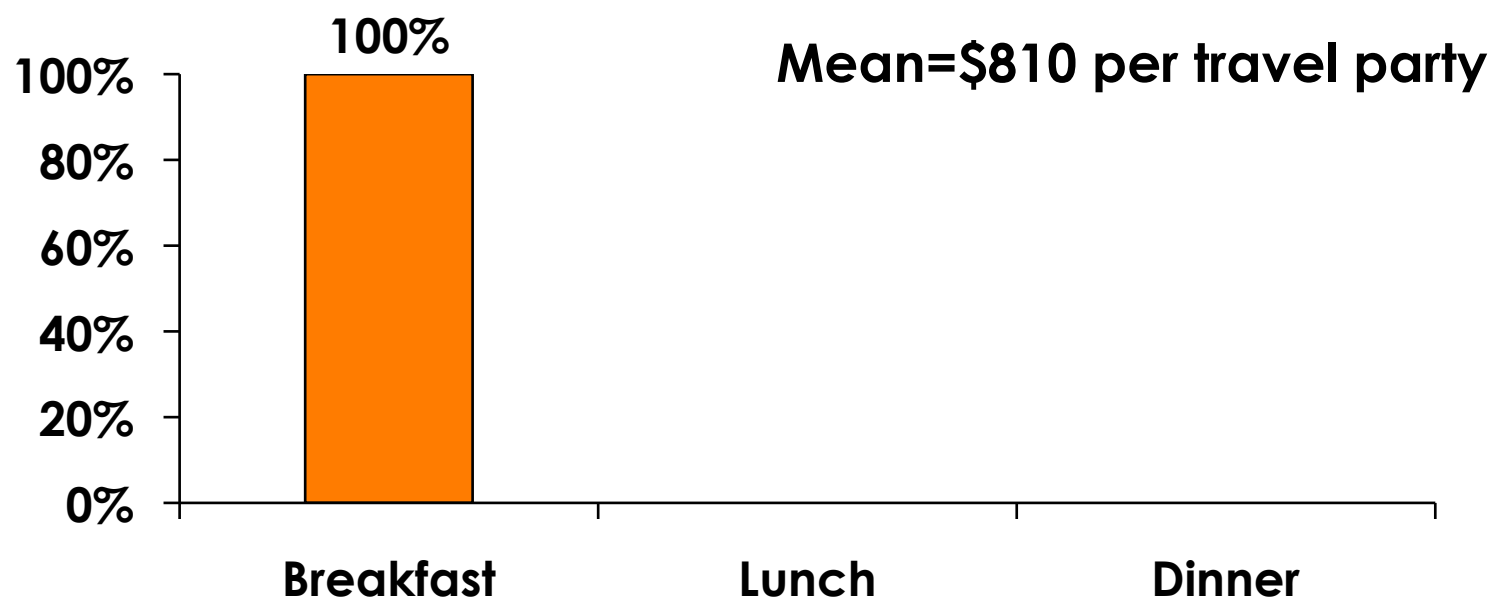
n=158



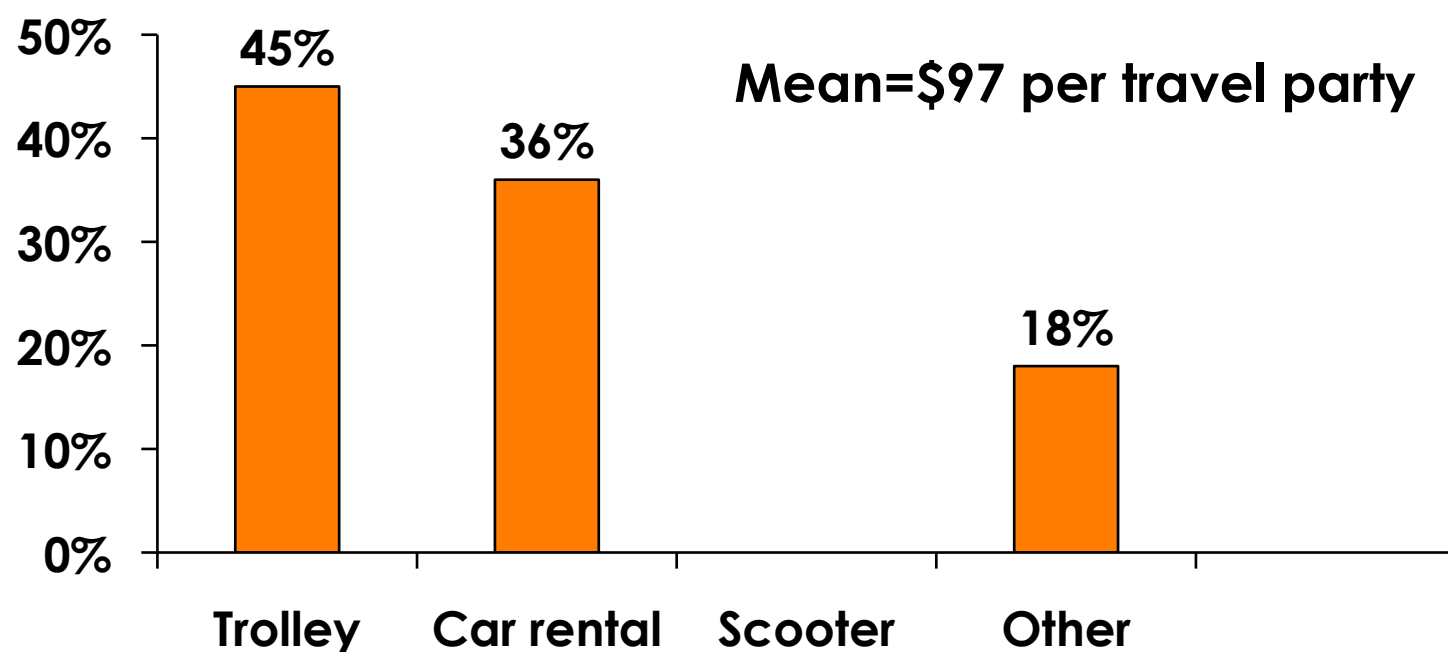
Prepaid Meal Breakdown

Accommodations with Daily Meal Package

n=2



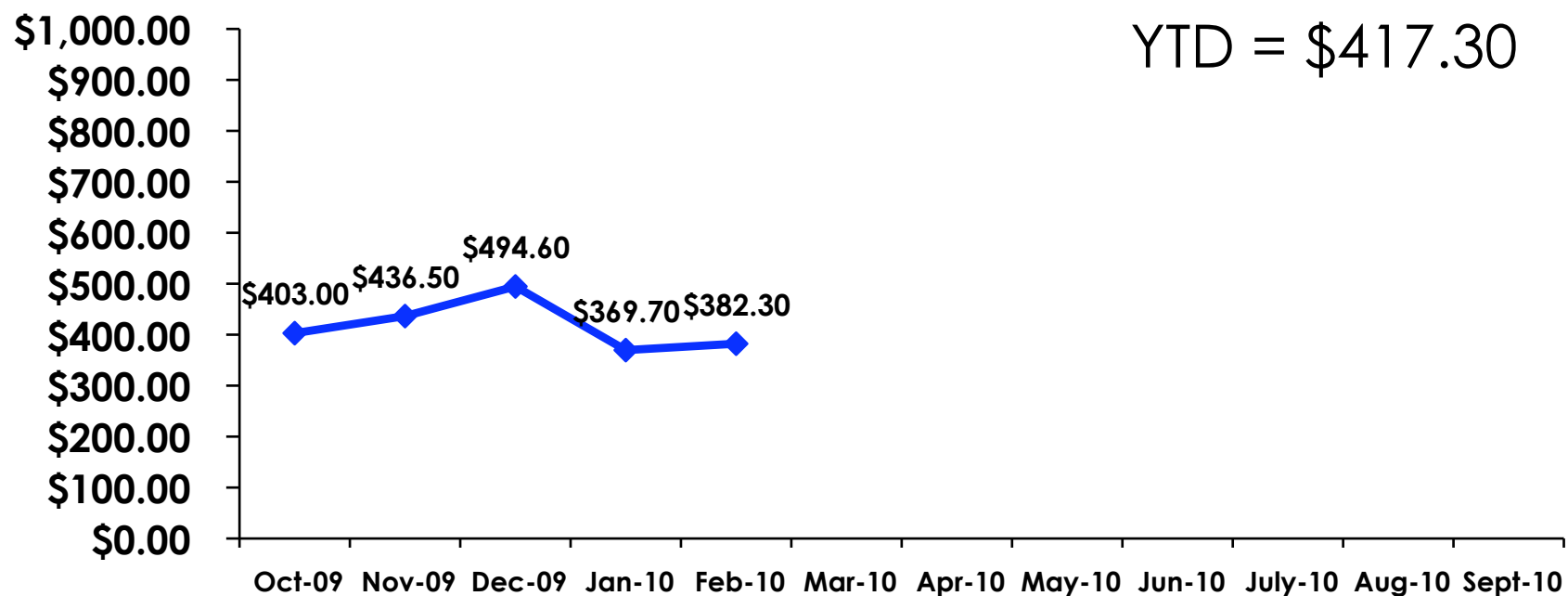
Prepaid Ground Transportation n=11



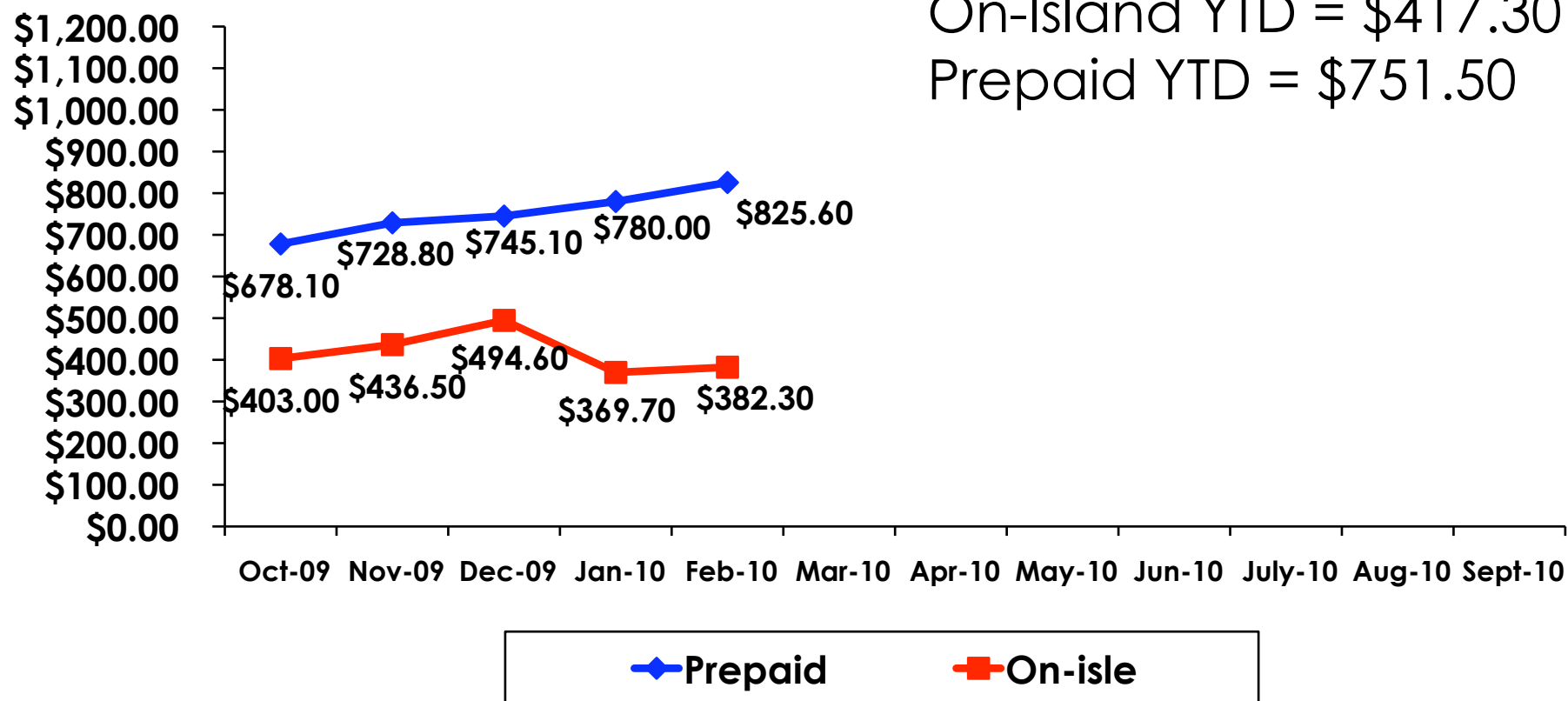
On-Island Expenditures

- \$964.60 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$13,500 = Maximum (highest amount recorded for the entire sample)
- \$382.30 = overall mean average per person on-island expenditure

On-Island Expenditures



Prepaid/On-Island Expenditures



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
			Male	Female	Male				Female				
					AGE				AGE				
					20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$964.57	\$907.38	\$1,022.42	\$707.92	\$822.84	\$954.55	\$1,745.00	\$700.00	\$888.55	\$1,078.47	\$1,169.20	\$760.00
	Median	\$600	\$600	\$600	\$500	\$500	\$800	\$925	\$700	\$600	\$600	\$580	\$600

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$58.11	\$60.98	\$55.21	\$0.00	\$11.79	\$66.65	\$96.52	\$52.11
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$27.09	\$27.56	\$26.61	\$0.00	\$18.28	\$33.68	\$26.40	\$21.05
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$34.91	\$30.53	\$39.34	\$0.00	\$30.87	\$45.57	\$20.06	\$34.21
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$126.83	\$133.62	\$119.97	\$0.00	\$102.83	\$126.37	\$150.98	\$156.05
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$216.15	\$170.41	\$262.41	\$0.00	\$186.75	\$239.01	\$221.33	\$170.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$116.58	\$105.70	\$127.59	\$0.00	\$107.26	\$120.57	\$125.41	\$102.89
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$28.02	\$20.32	\$35.81	\$0.00	\$18.85	\$26.76	\$41.80	\$26.26
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$356.88	\$358.25	\$355.49	\$700.00	\$341.24	\$289.59	\$363.66	\$923.21
	Median	\$60	\$70	\$60	\$700	\$45	\$60	\$80	\$120
TOTAL ON ISLAND	Mean	\$964.57	\$907.38	\$1,022.42	\$700.00	\$817.87	\$948.21	\$1,046.17	\$1,485.79
	Median	\$600	\$600	\$600	\$700	\$575	\$550	\$700	\$820

On-Island Expenditures

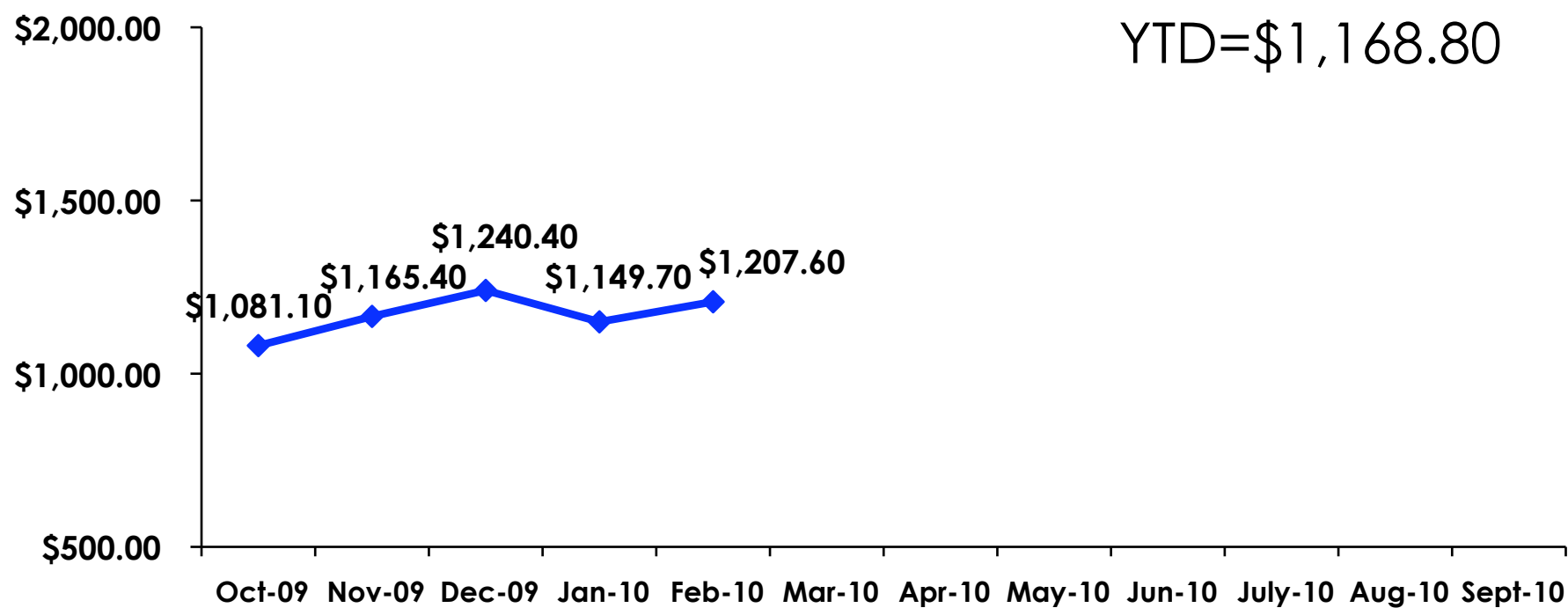
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$42.43	\$105.16
	Median	\$0	\$0
F&B-FF	Mean	\$29.09	\$21.07
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$28.71	\$53.51
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$150.78	\$55.00
TOUR	Median	\$0	\$0
GIFT/	Mean	\$204.30	\$251.70
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$122.86	\$97.76
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$23.39	\$41.90
	Median	\$0	\$0
OTHER EXP	Mean	\$337.43	\$415.23
	Median	\$67	\$15
TOTAL ON	Mean	\$938.99	\$1,041.33
ISLAND	Median	\$600	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,207.60 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,528 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

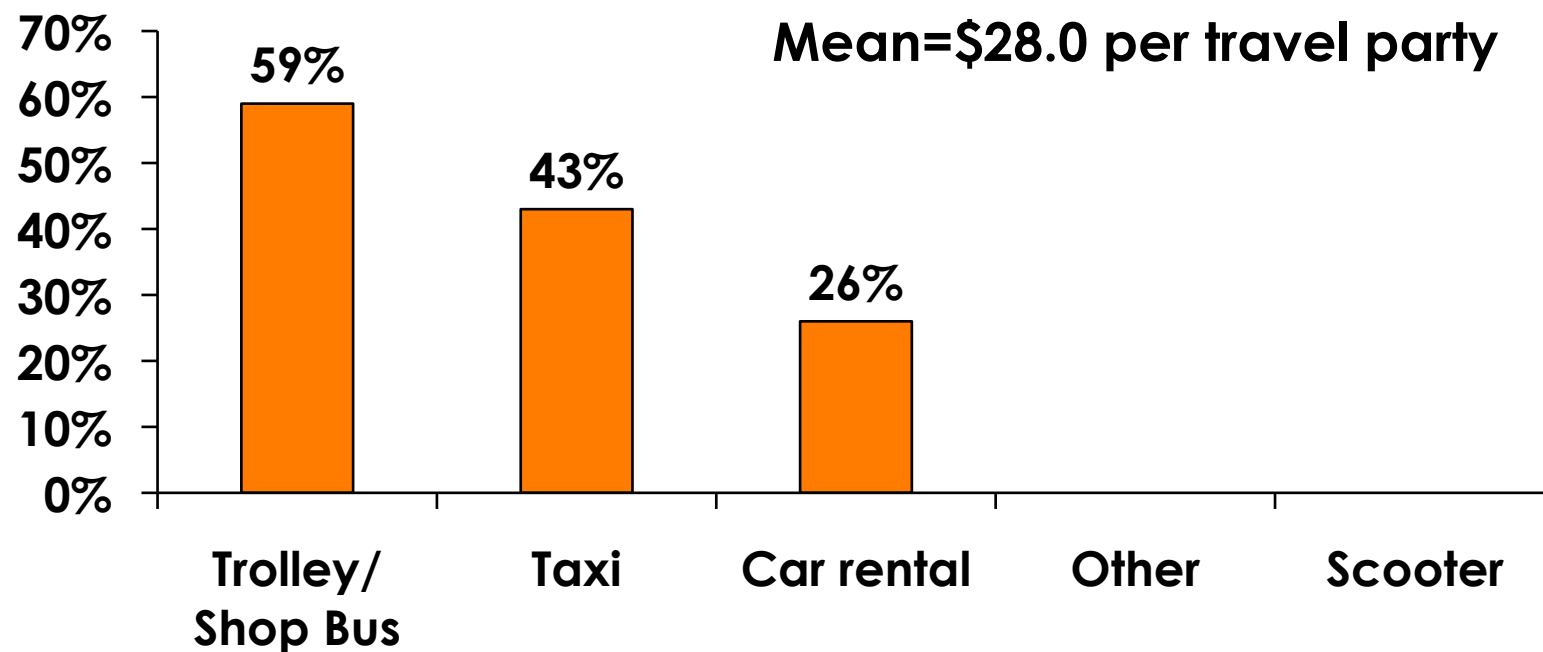


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$58.10
Food & beverage in fast food restaurant/ convenience store	\$27.10
Food & beverage at restaurants or drinking establishments outside a hotel	\$34.90
Optional tours and activities	\$126.80
Gifts/ souvenirs for yourself/companions	\$216.20
Gifts/ souvenirs for friends/family at home	\$116.60
Local transportation	\$28.00
Other expenses not covered	\$356.90
Average Total	\$964.60

Local Transportation

n=105



Guam Airport Expenditures

- \$47.90 = 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

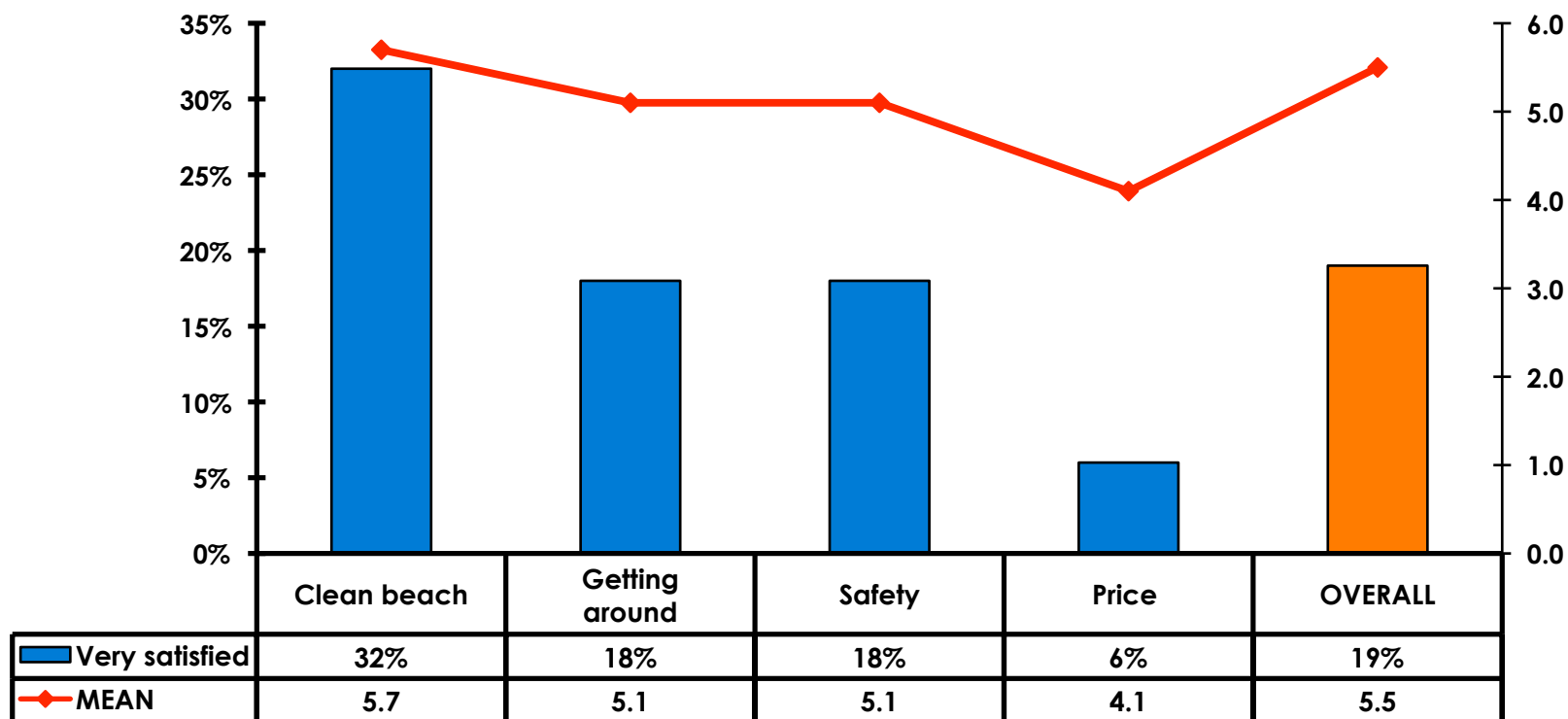
	MEAN \$
Food & Beverages	\$3.30
Gifts/Souvenirs Self	\$27.90
Gifts/Souvenirs Others	\$16.70
Total	\$47.90

SECTION 4 **VISITOR SATISFACTION**

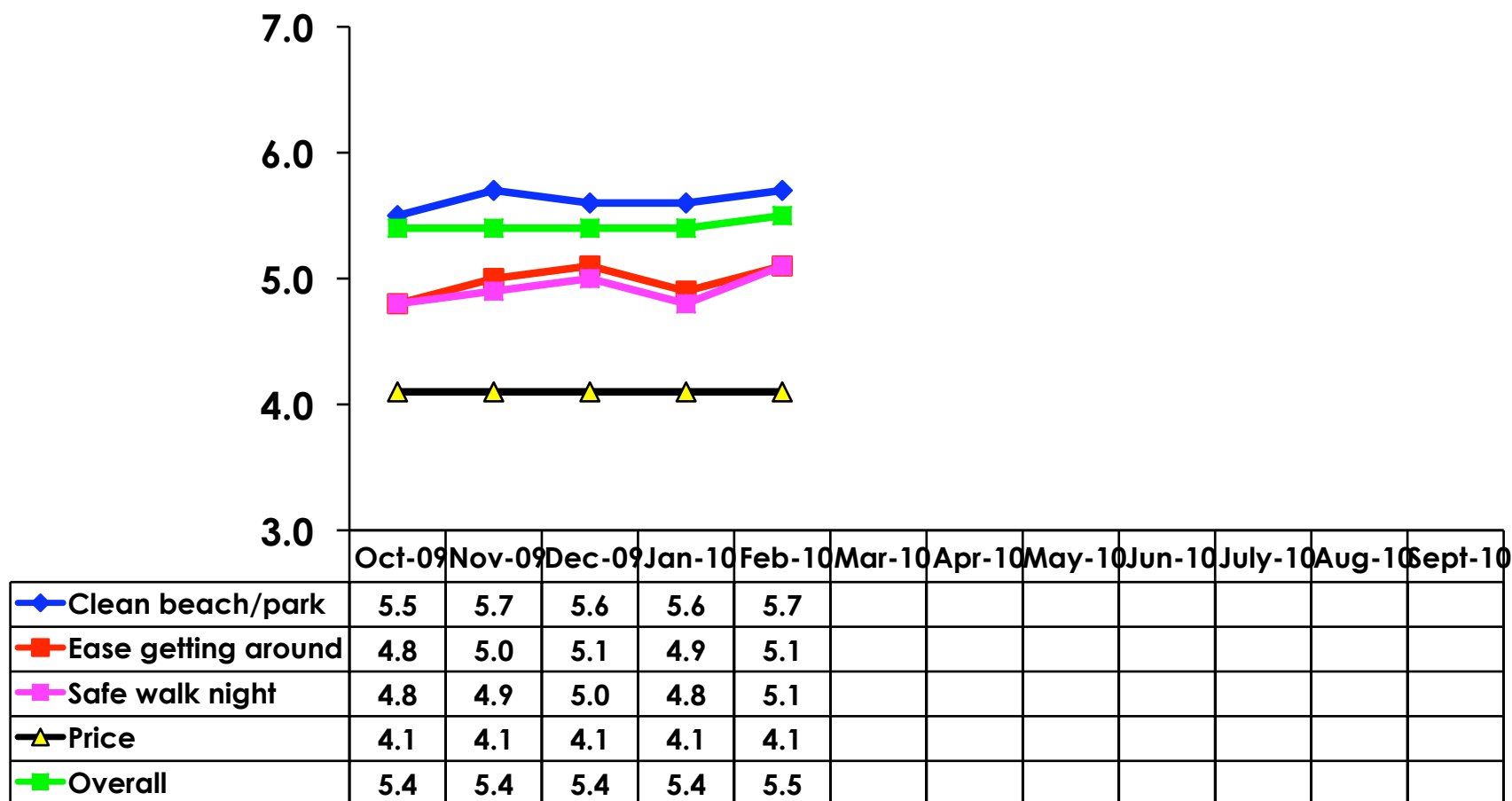
Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



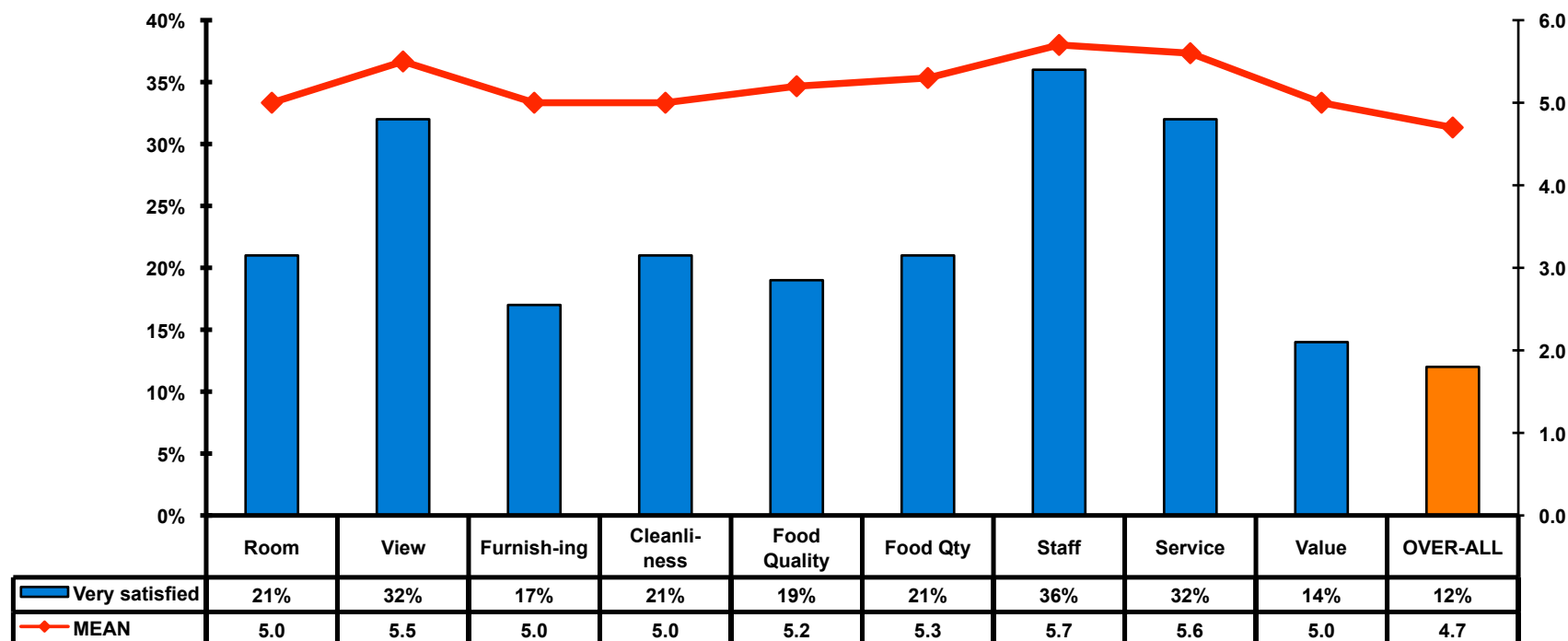
Guam Perceptions



Quality of Accommodations

7pt Rating Scale

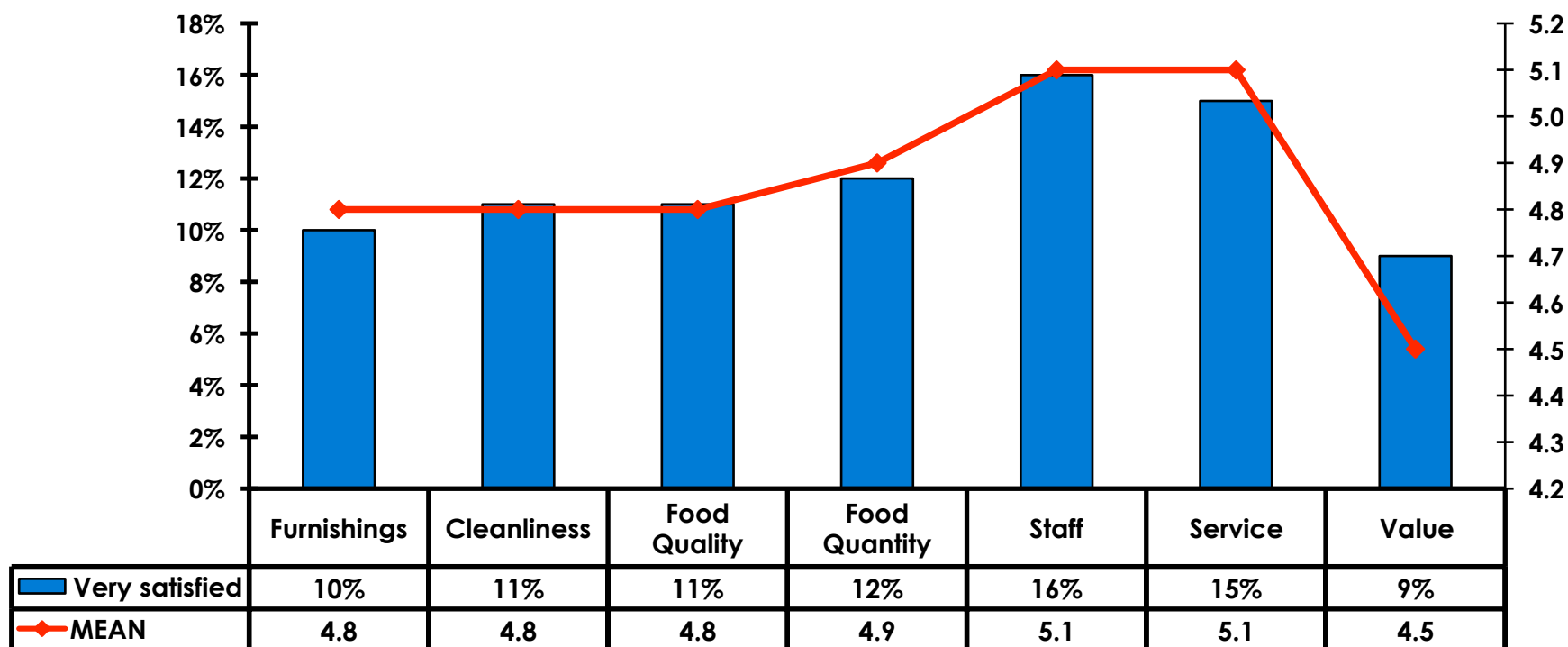
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

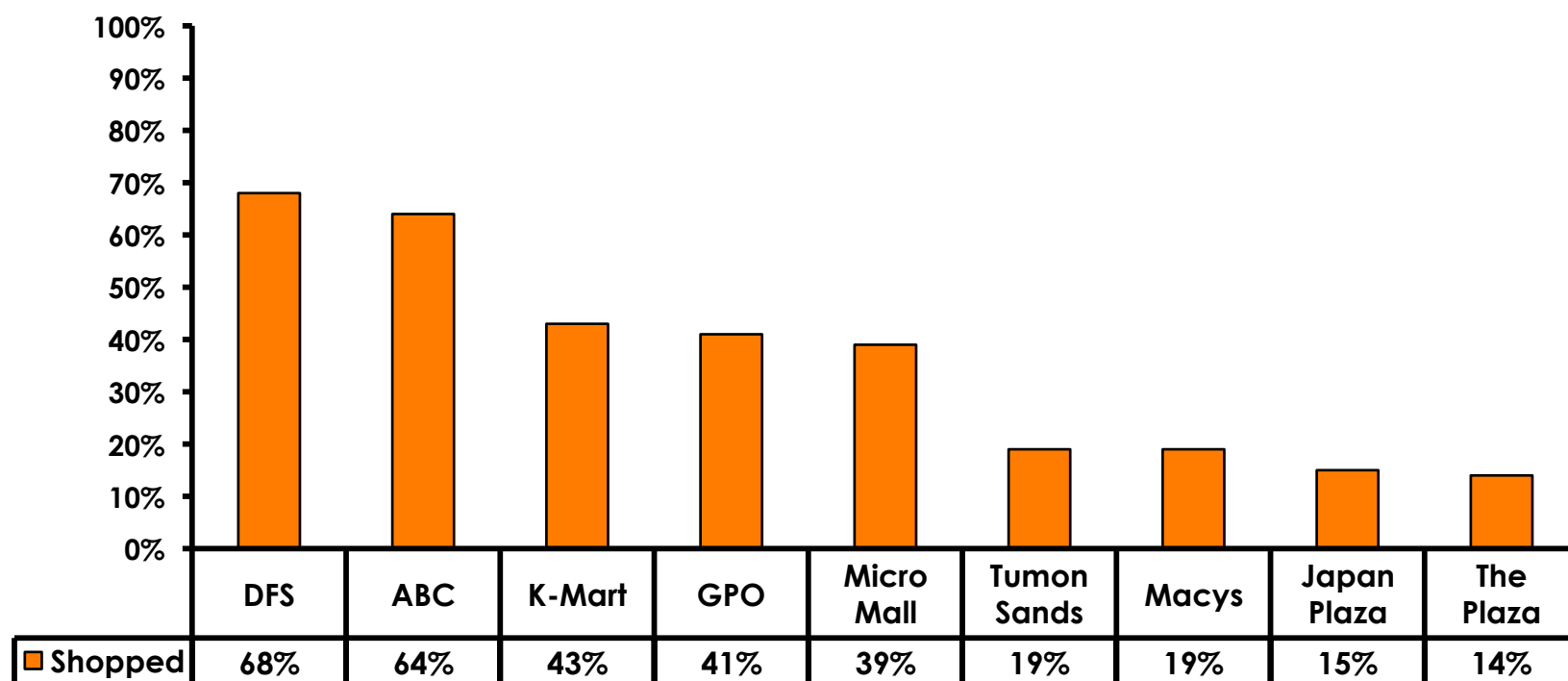
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

7pt Rating Scale

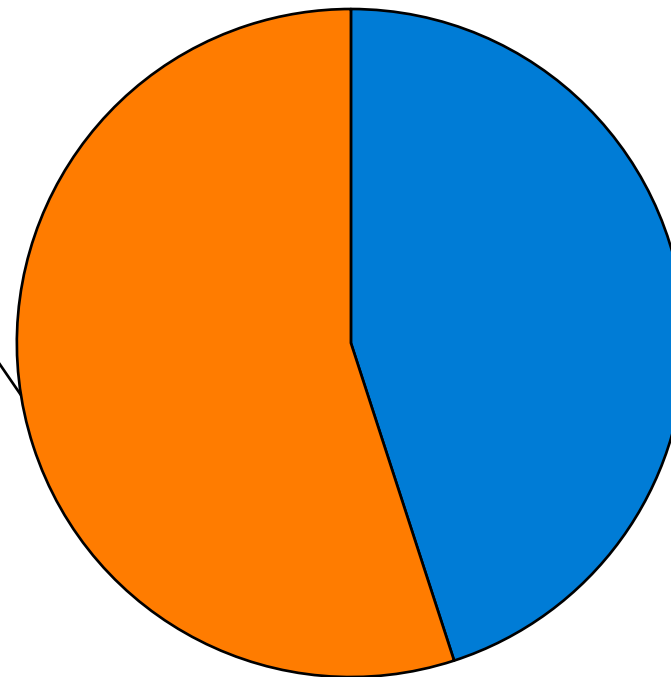
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 42%	Score of 6 to 7 = 36%
Score of 4 to 5 = 47%	Score of 4 to 5 = 48%
Score 1 to 3 = 11%	Score 1 to 3 = 17%
MEAN = 5.0	MEAN = 4.8

Optional Tour Participation

- Average number of tours participated in is 1.1

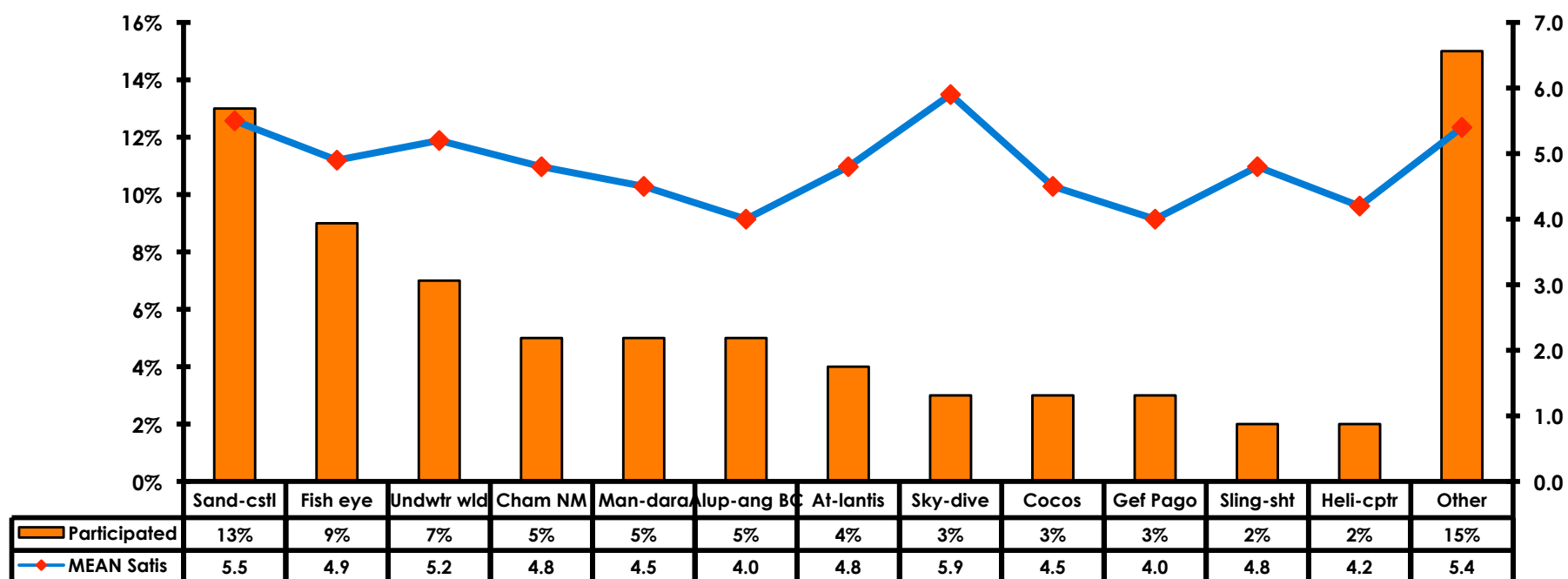
**One or more
55%**



**None
45%**

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 = 34%
Score of 4 to 5 = 50%	Score of 4 to 5 = 56%
Score 1 to 3 = 9%	Score 1 to 3 = 10%
MEAN = 5.1	MEAN = 4.8

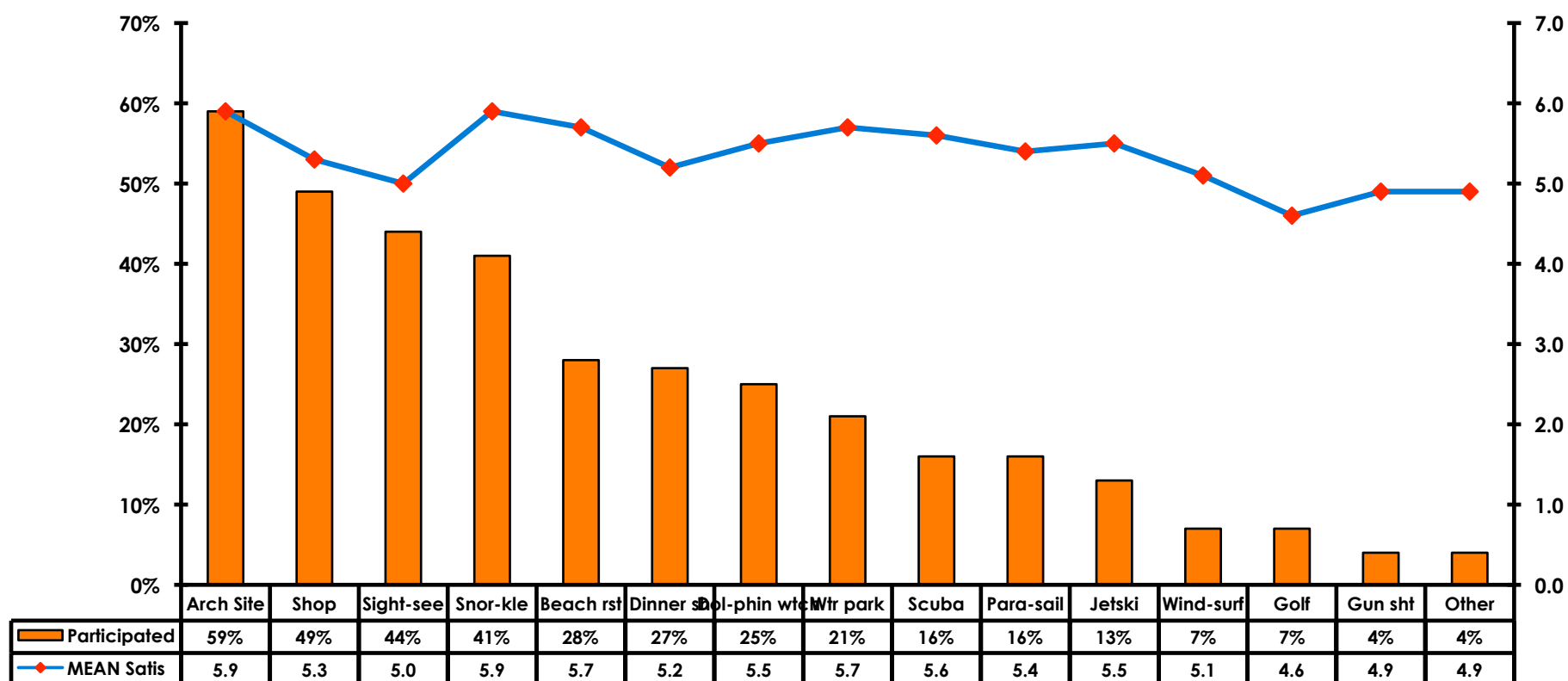
Night Tours Satisfaction

7pt Rating Scale

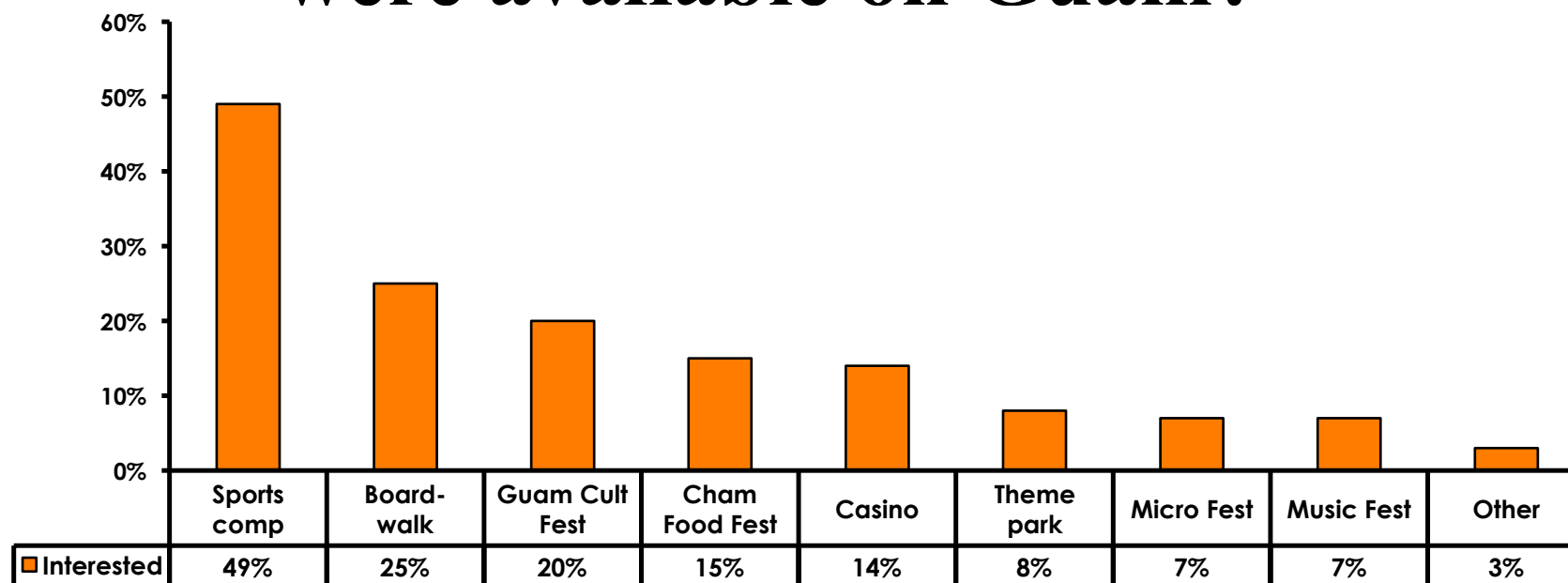
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 25%	Score of 6 to 7 = 22%
Score of 4 to 5 = 59%	Score of 4 to 5 = 59%
Score 1 to 3 = 16%	Score 1 to 3 = 19%
MEAN = 4.5	MEAN = 4.4

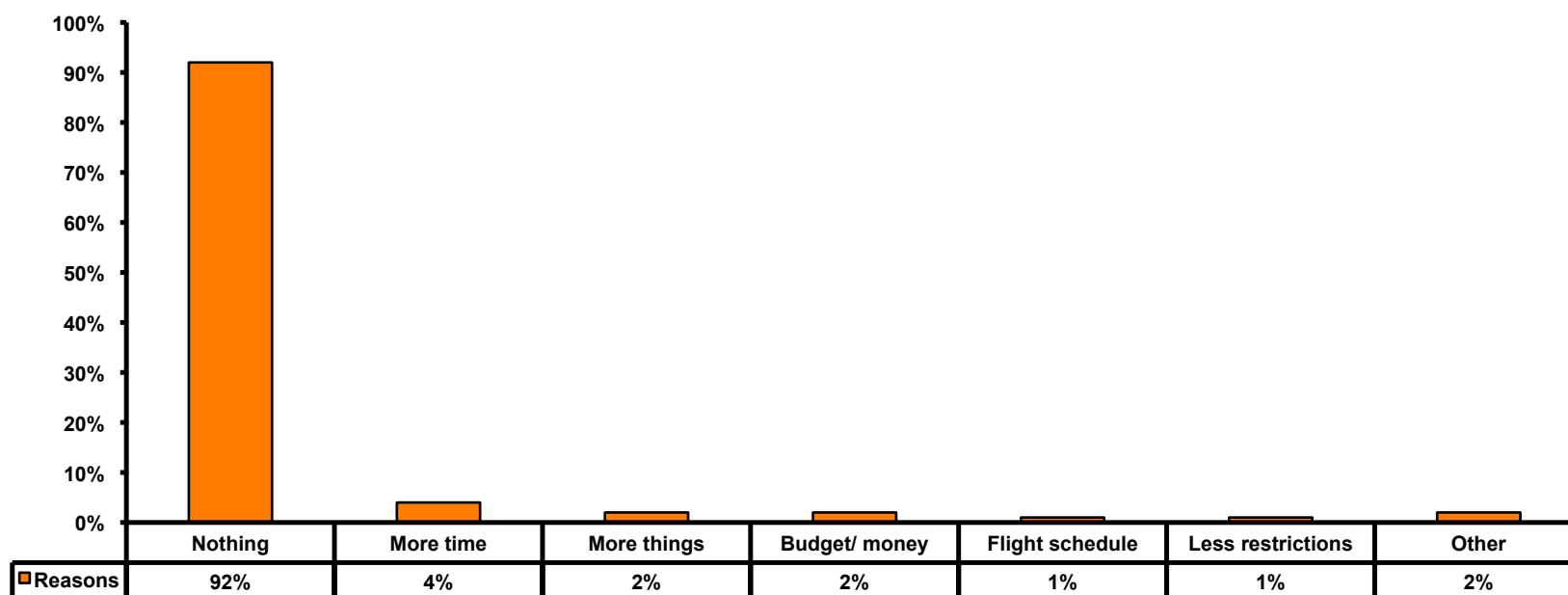
Satisfaction with Other Activities



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



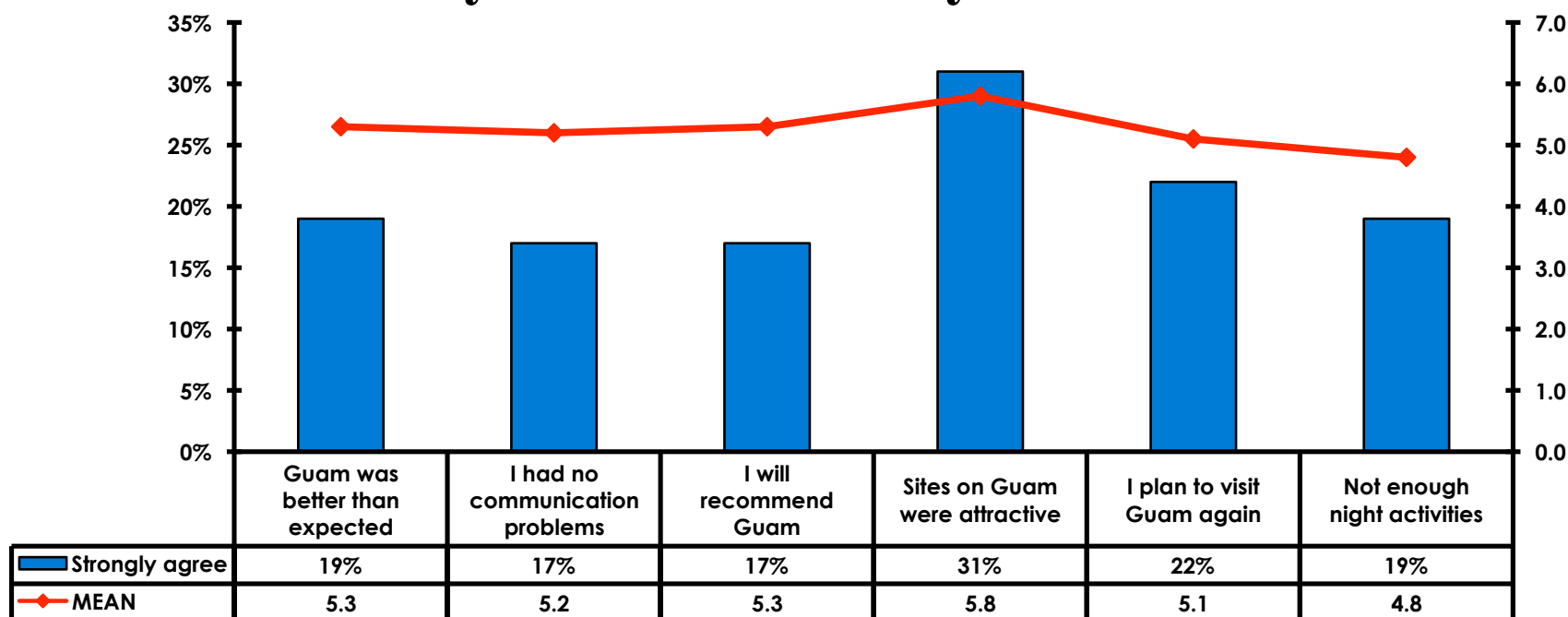
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

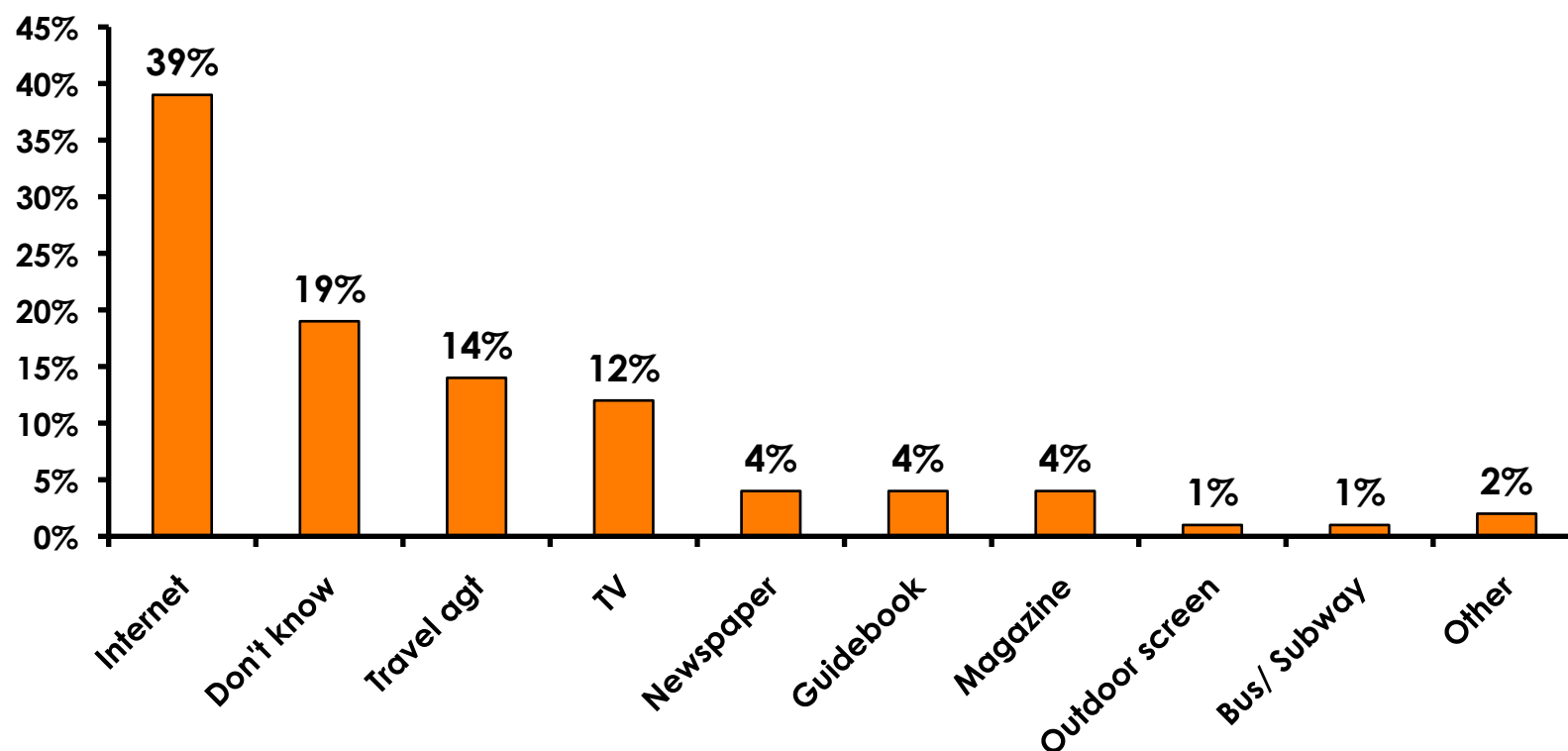
7=Very Satisfied/ 1=Very Dissatisfied



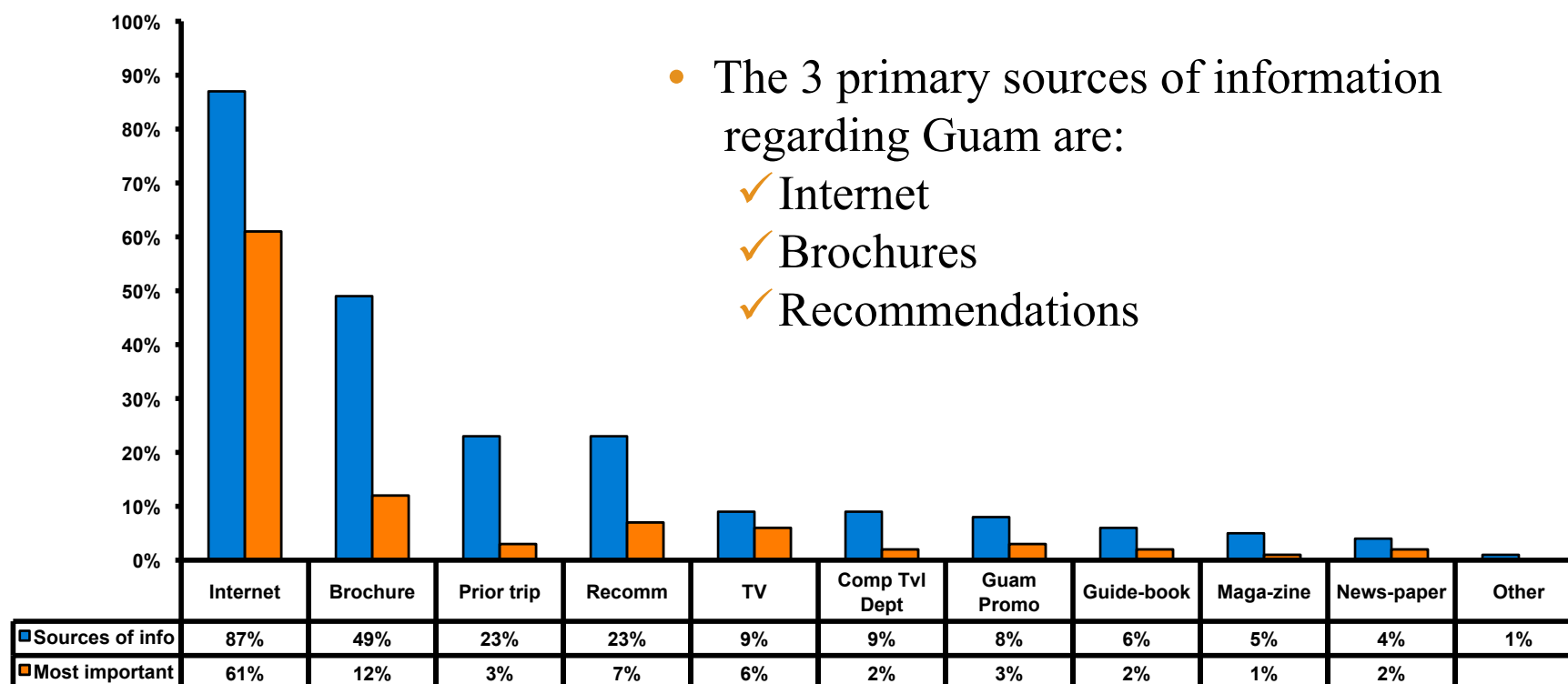
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

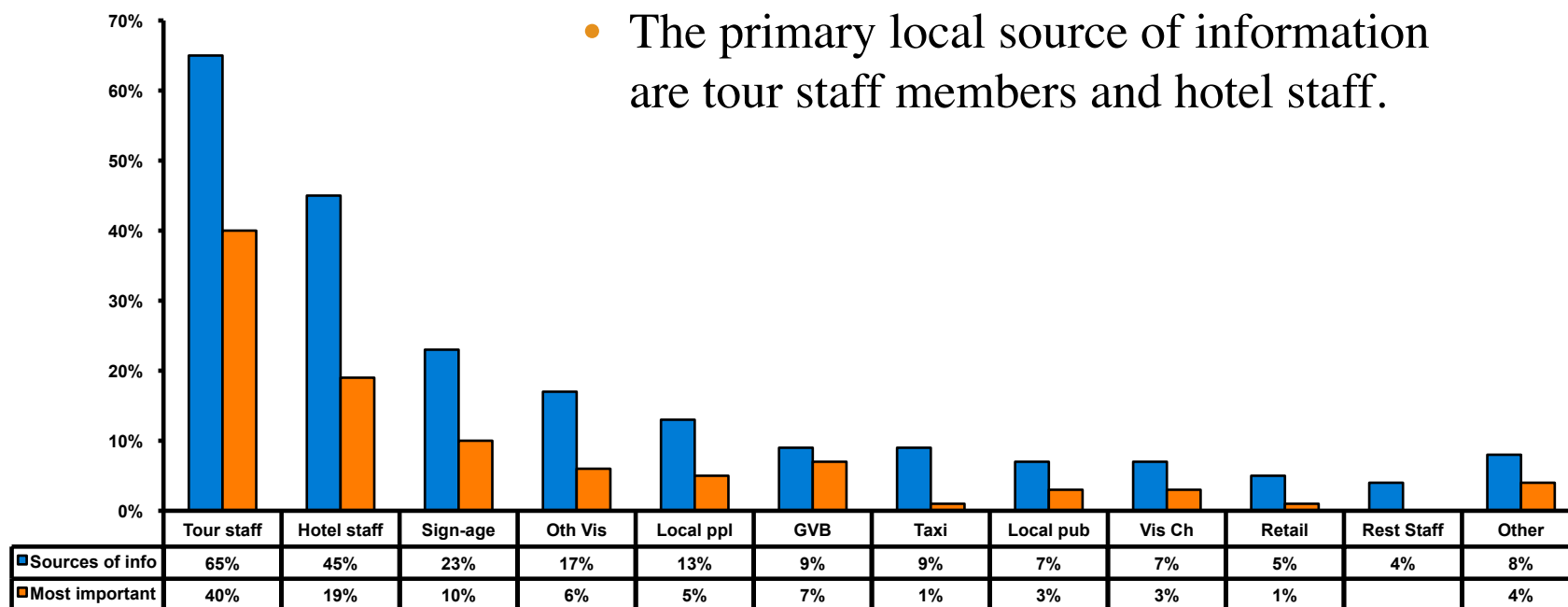


Sources of Information Pre-arrival



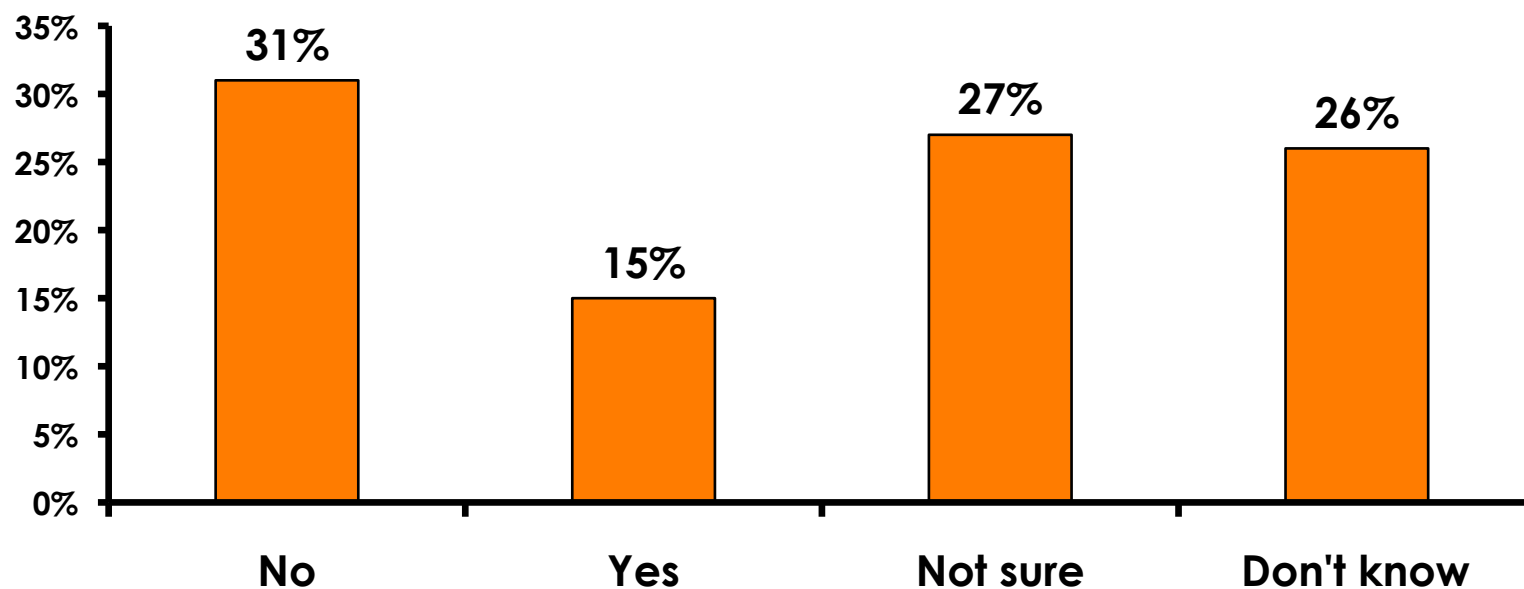
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

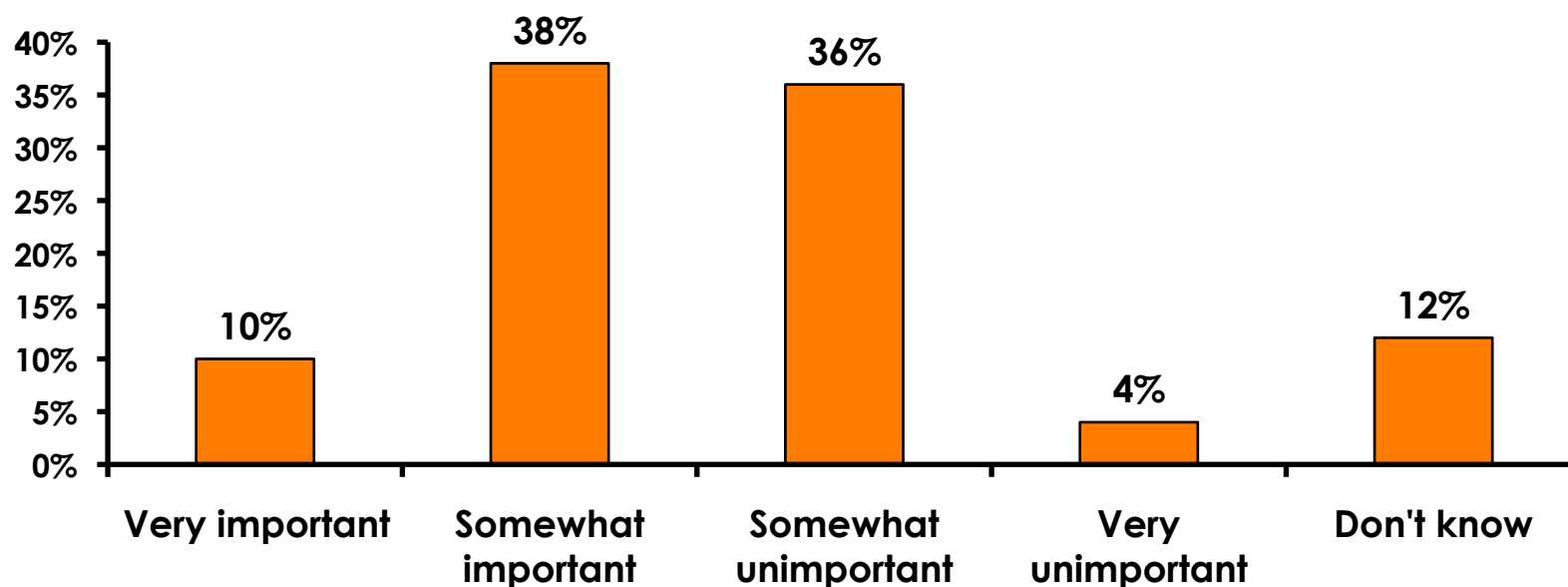
Good time to spend money on travel outside of Korea - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No		24%	34%	37%	32%	16%	36%	32%	28%	50%
	Yes	50%	18%	14%	12%	11%	8%	12%	12%	20%	17%
	Not sure	50%	25%	28%	30%	21%	32%	27%	32%	26%	11%
	Do not know		33%	25%	21%	37%	44%	25%	23%	26%	22%
Total	Count	2	92	155	82	19	25	85	77	135	18

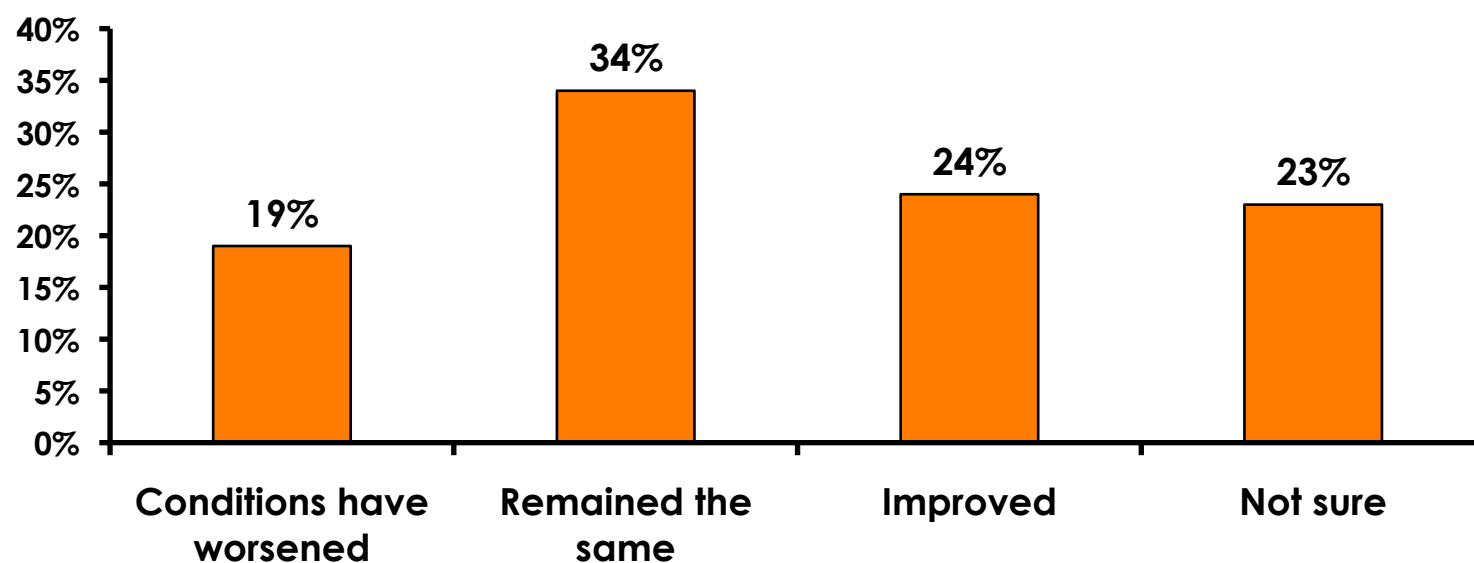
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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%	5%	4%			5%	8%	3%	
	Somewhat unimportant	50%	30%	38%	32%	53%	20%	33%	30%	47%	11%
	Somewhat important	50%	39%	37%	40%	37%	24%	40%	43%	32%	67%
	Very important		12%	8%	12%	5%	16%	11%	10%	9%	6%
	Don't know		15%	12%	12%	5%	40%	12%	9%	9%	17%
Total	Count	2	92	156	82	19	25	85	77	136	18

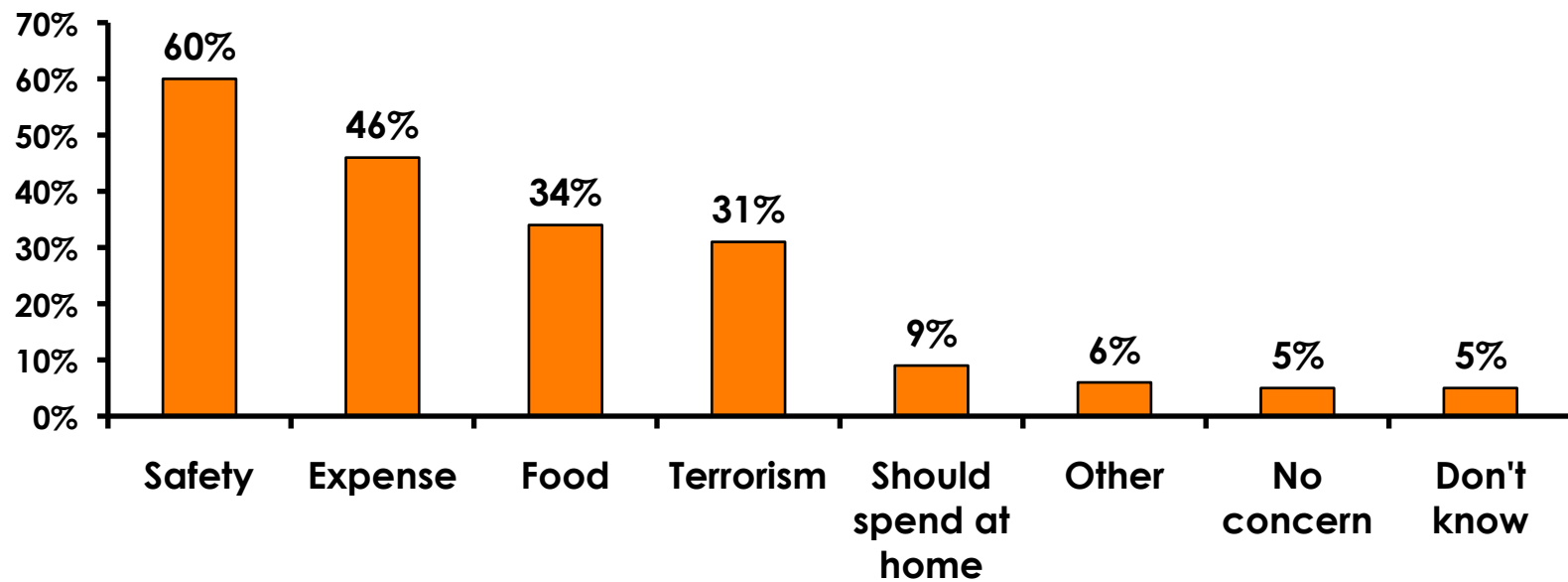
Rating Korean Economy Compared to 12 months ago



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		17%	22%	15%	17%	8%	27%	21%	14%	28%
	Conditions have remained the same		36%	33%	38%	22%	48%	33%	32%	33%	28%
	Conditions have improved	50%	23%	21%	28%	39%	12%	18%	30%	27%	22%
	Do not know	50%	24%	24%	20%	22%	32%	22%	17%	25%	22%
Total	Count	2	92	156	82	18	25	85	77	135	18

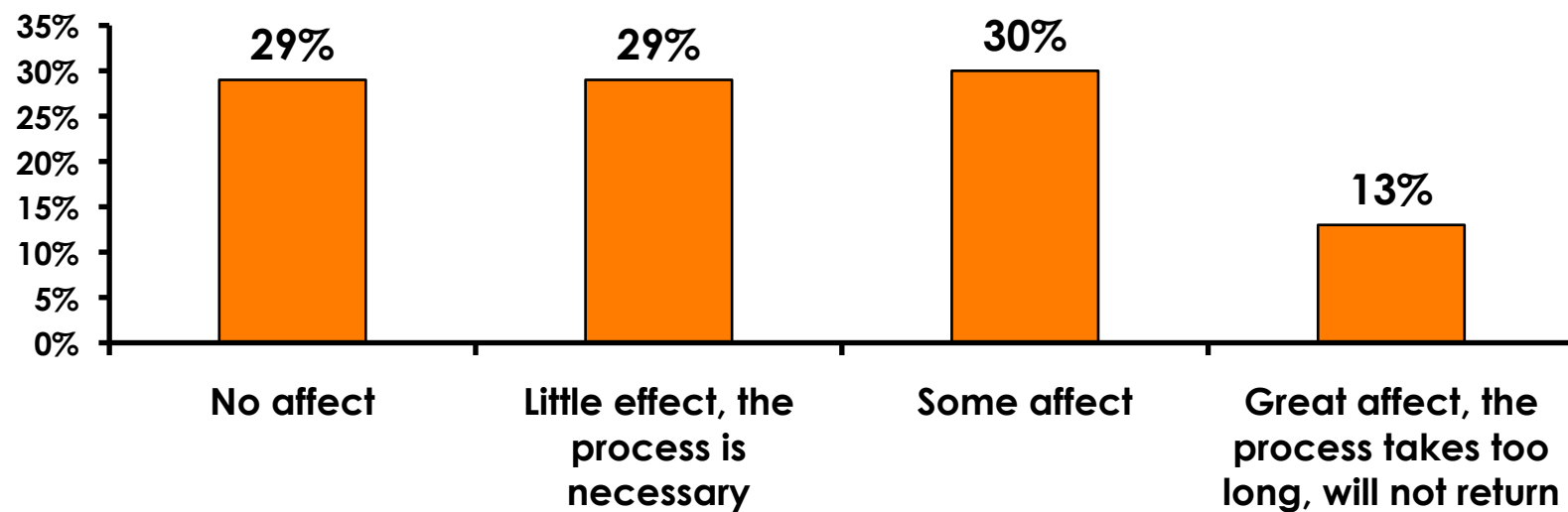
Concerns about travel outside of Korea - Overall



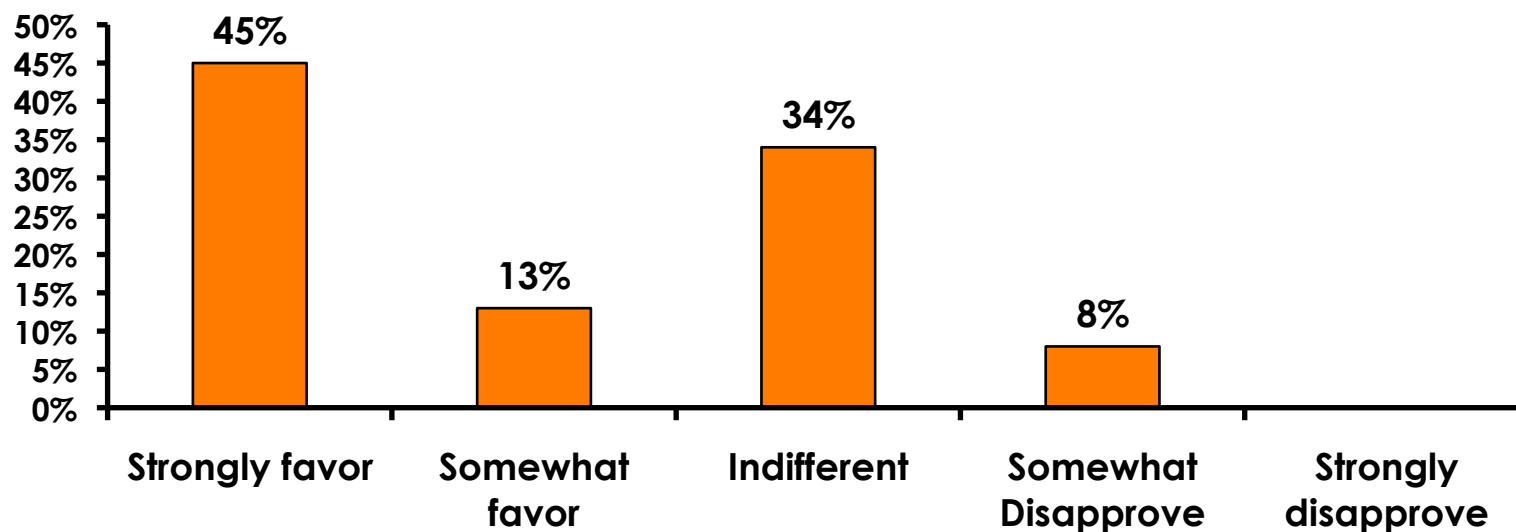
Concerns about travel outside of Korea - By Age & Income

		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		57%	65%	57%	58%	36%	67%	66%	60%	50%
	Expense		51%	47%	44%	32%	48%	58%	39%	42%	50%
	Food		37%	33%	34%	37%	16%	39%	38%	35%	17%
	Terrorism	50%	27%	32%	30%	37%	28%	31%	31%	30%	17%
	Spending money abroad when it should be spent at home		13%	6%	7%	11%	20%	15%	4%	5%	11%
	Other		7%	5%	5%	16%	4%	5%	5%	7%	11%
	No concerns	50%	2%	7%	4%	5%	12%	4%	4%	7%	
	Do not know		7%	5%	5%		12%	4%	3%	6%	11%
Total	Cases	2	92	156	82	19	25	85	77	136	18

Security Screening/ Immigration Process at Guam International Airport



Increase Drinking Age to 21



Increase Drinking Age to 21 by Gender & Age

		AGE					GENDER	
		<20	20-29	30-39	40-49	50+	Male	Female
Q.28	Strongly Favor	50%	36%	48%	47%	47%	50%	39%
	Somewhat favor		13%	13%	16%	5%	10%	17%
	Indifferent	50%	43%	31%	28%	47%	33%	36%
	Somewhat disapprove		8%	8%	9%		7%	9%
Total	Count	2	91	157	81	19	177	173

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

- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **11%**
- Neutral (Score 4-5) – **38%**
- Disagree (Score 1-3) – **51%**

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

