



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

JULY 2010



Prepared by: QMark Research

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Background & Methodology

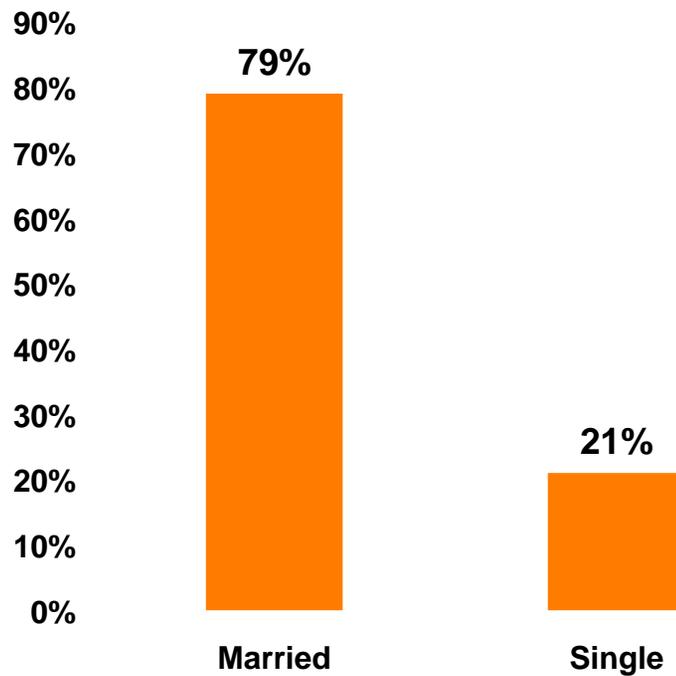
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

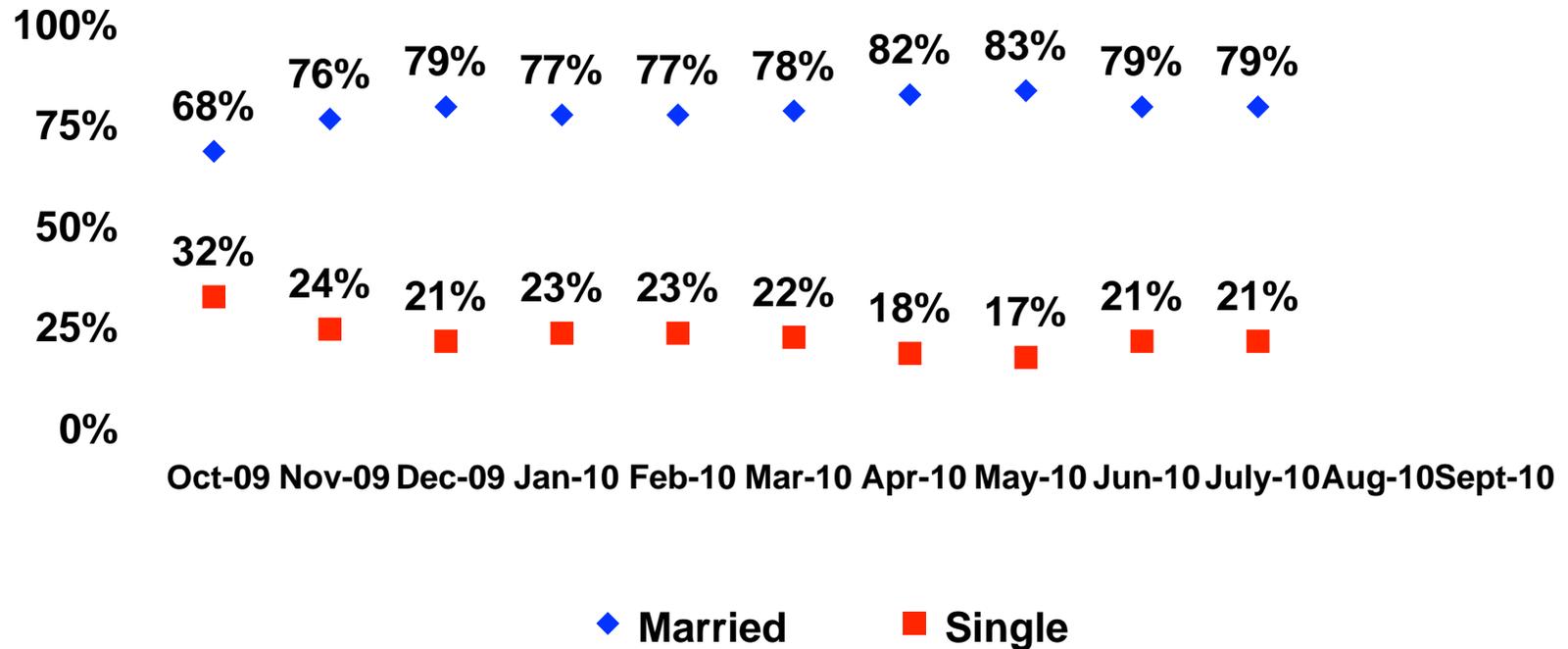
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

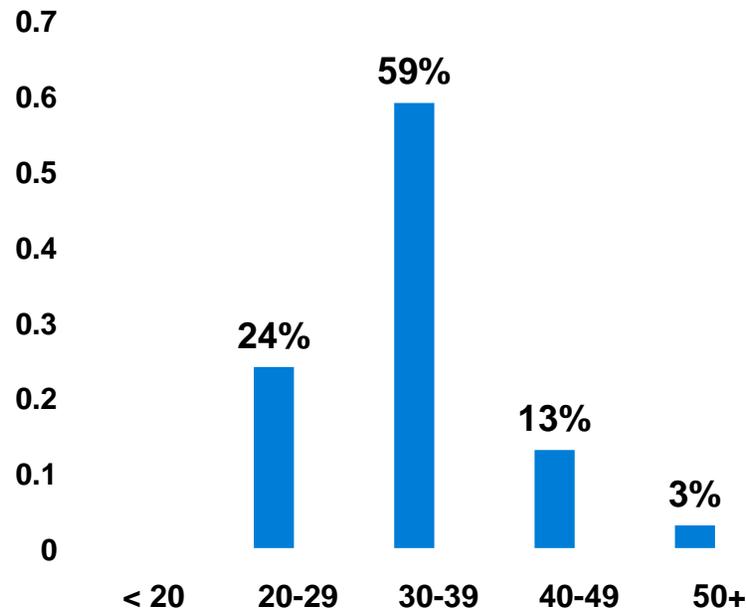


- A majority of visitors are married.

Marital Status

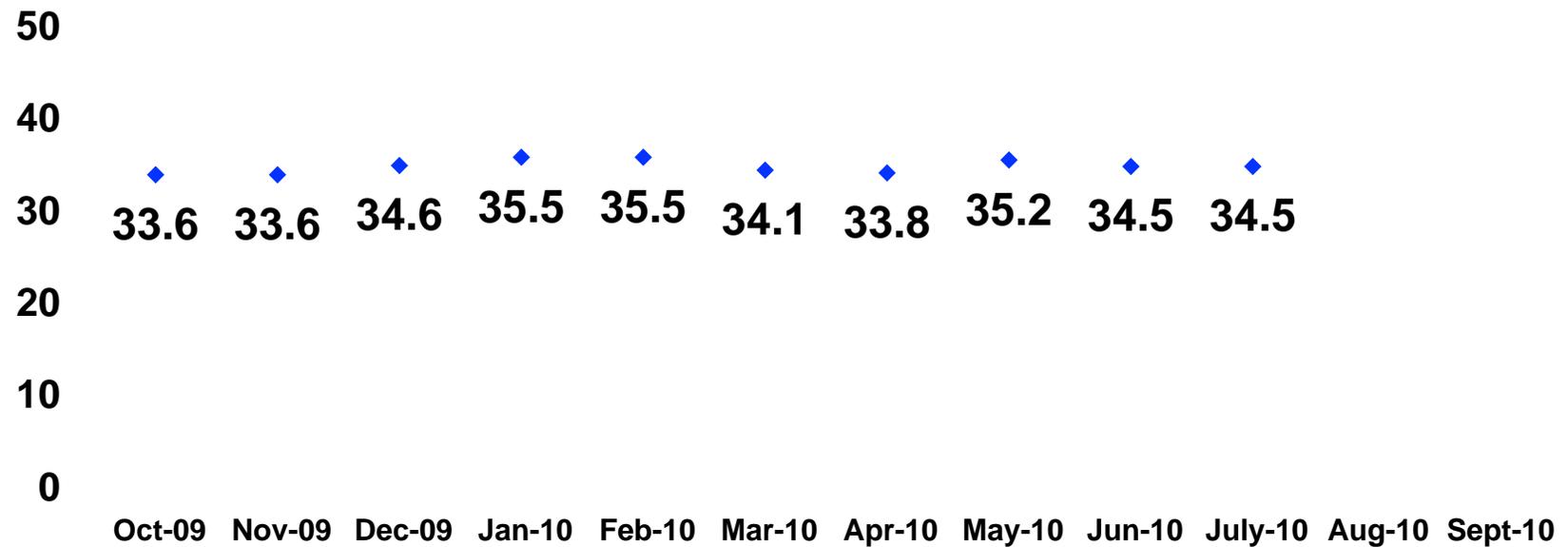


Age - Overall

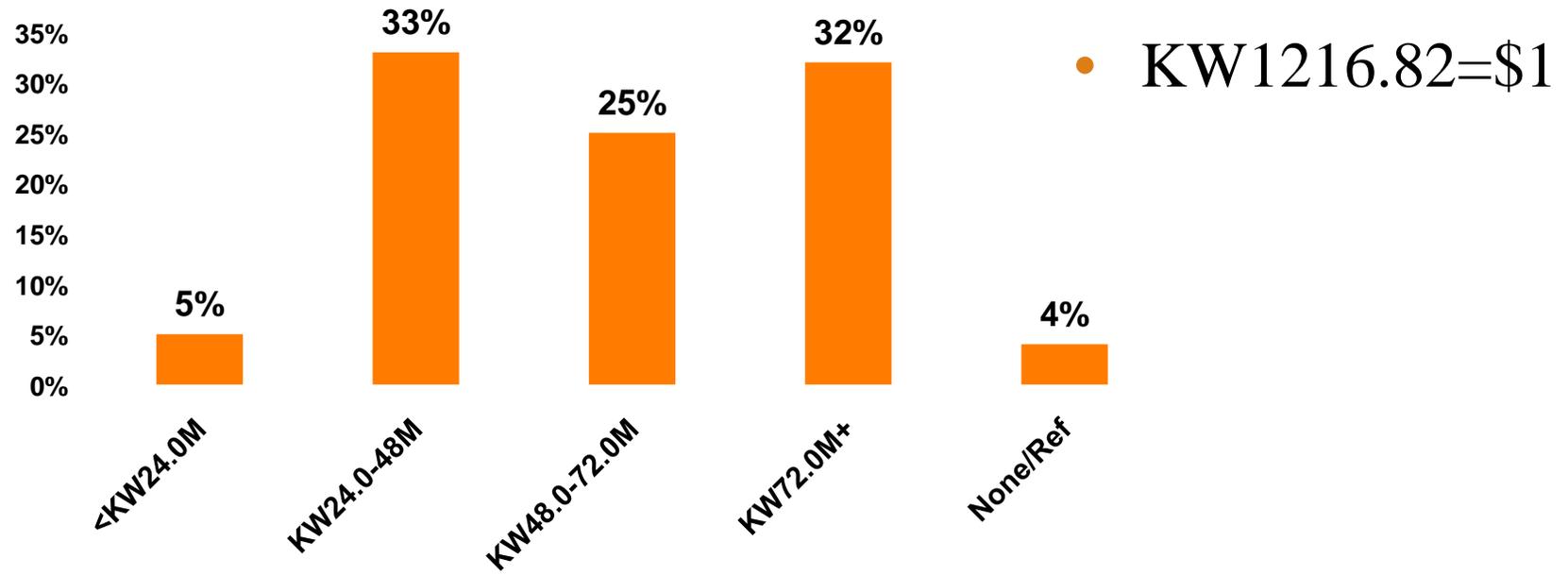


- The average age of the respondents is 34.5 years of age.

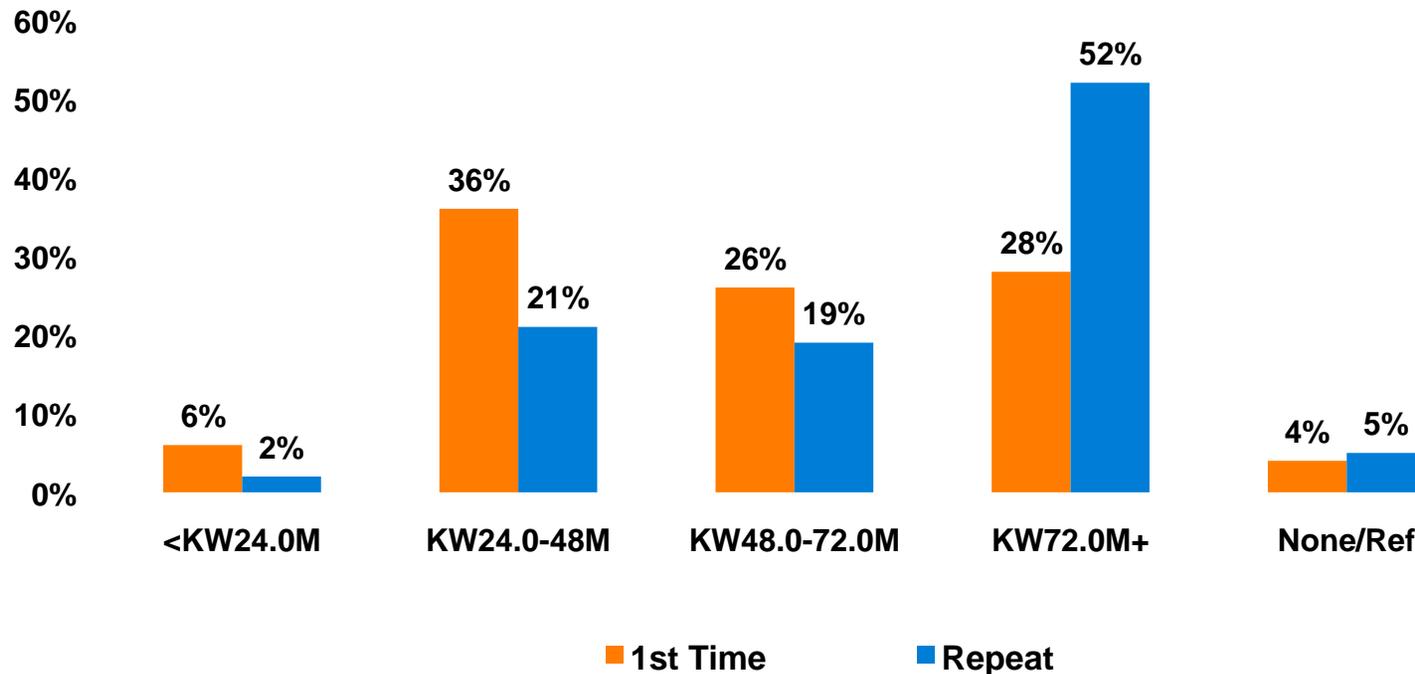
Average Age



Personal Income



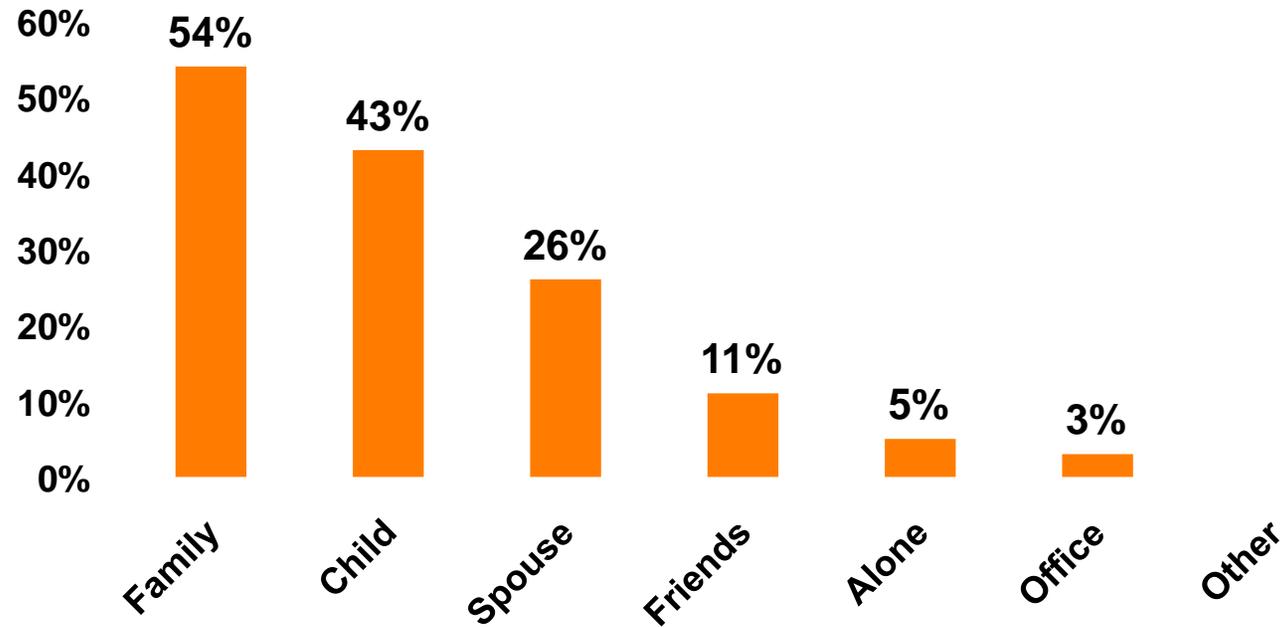
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

	TOTAL	GENDER		AGE				
		Male	Female	20-29	30-39	40-49	50+	
PERSONAL INCOME <KW24.0M	Count	19	6	13	9	8	1	1
		6%	3%	8%	11%	4%	2%	8%
KW24.0M-KW48.0M	Count	114	54	60	42	64	6	2
		33%	31%	36%	52%	32%	13%	17%
KW48.0M-KW72.0M	Count	85	50	35	9	57	14	5
		25%	29%	21%	11%	28%	30%	42%
KW72.0M+	Count	109	56	53	14	67	24	4
		32%	33%	31%	17%	33%	52%	33%
Refused	Count	14	6	8	7	6	1	
		4%	3%	5%	9%	3%	2%	
Total	Count	341	172	169	81	202	46	12

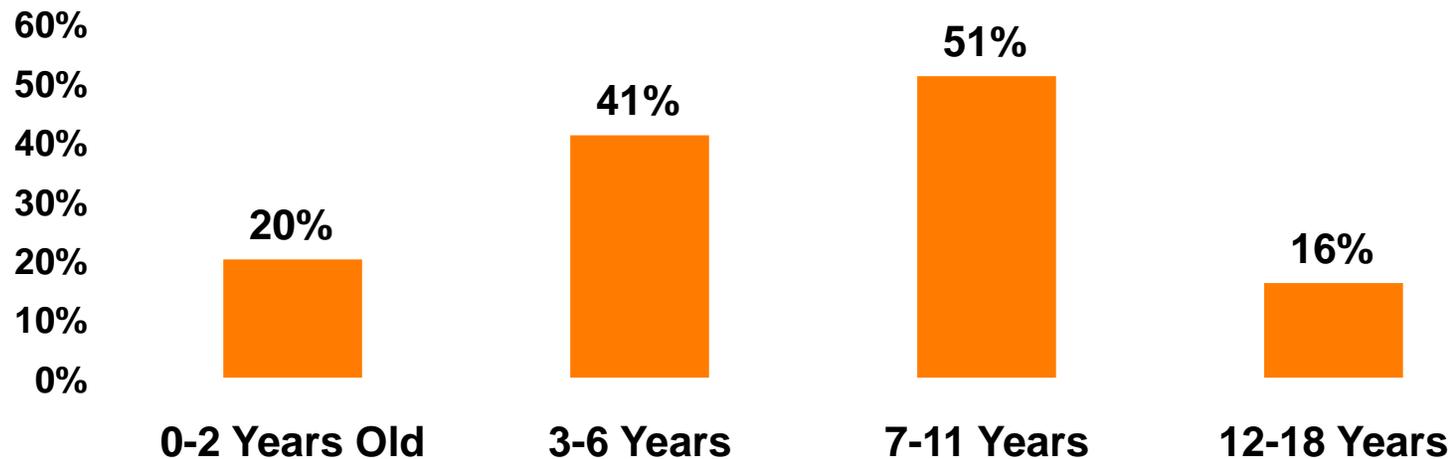
Travel Companions



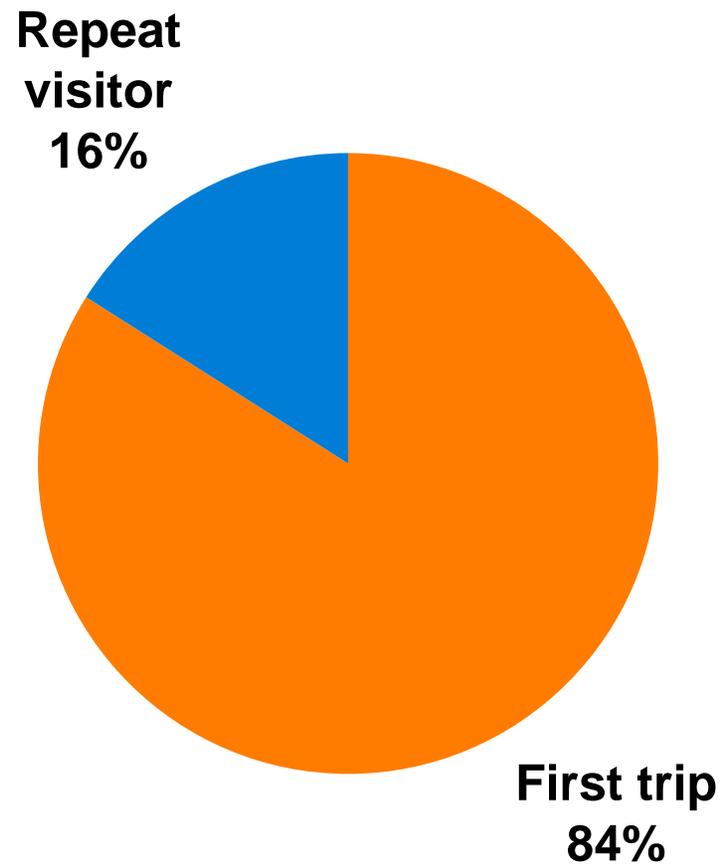
Number of Children Travel Party

N=152 total respondents traveling with children.

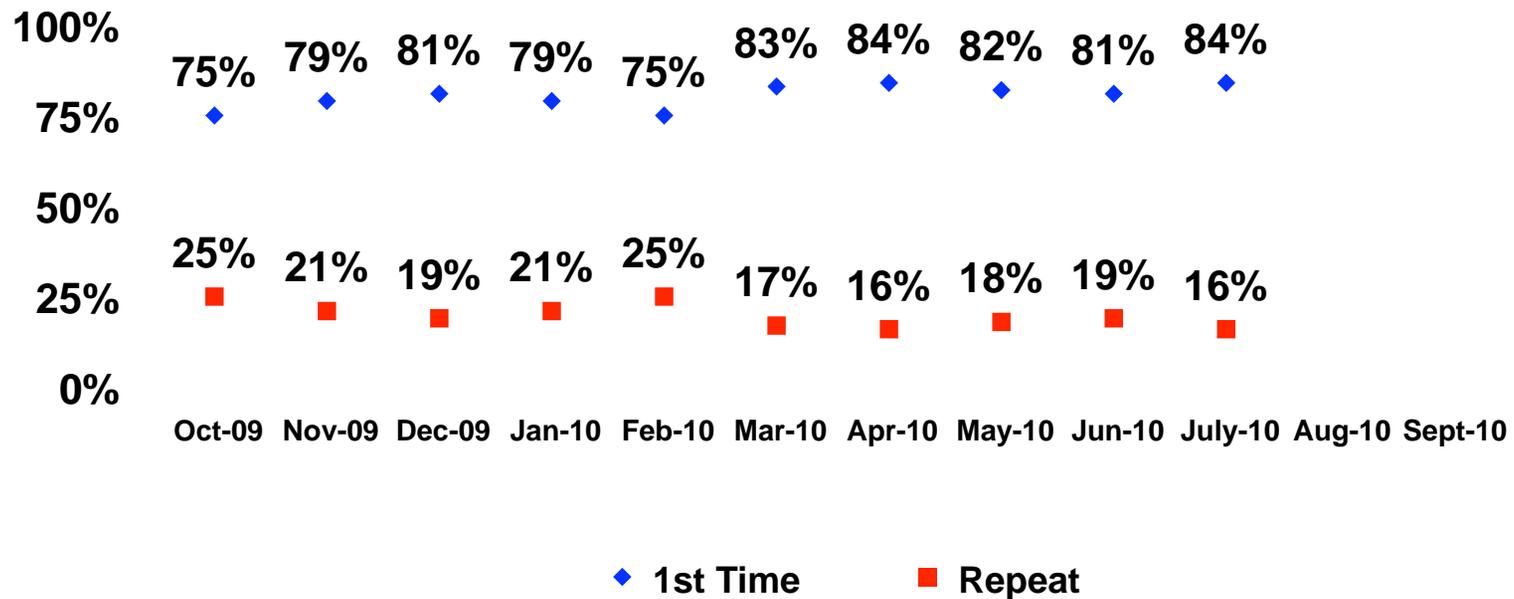
(Of those N=152 respondents, there is a total of 230 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



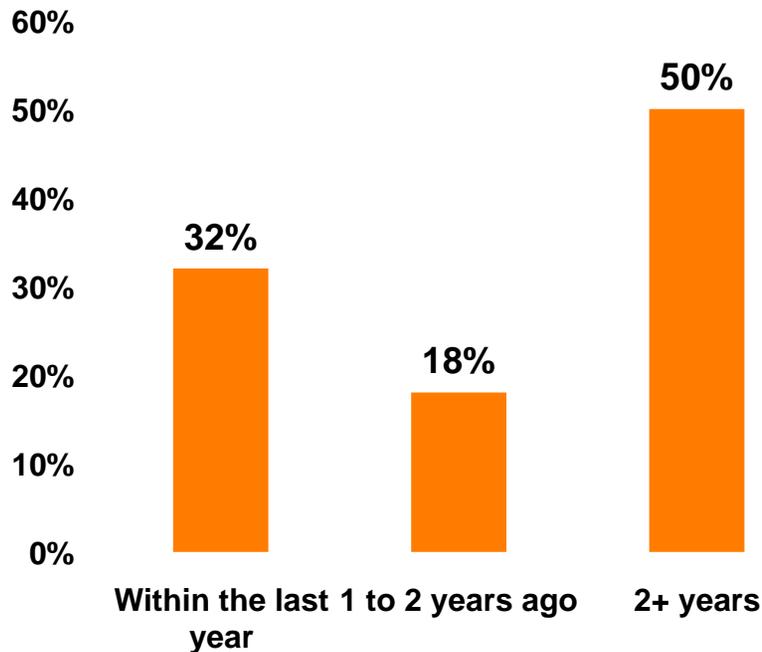
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	175	149	26
			50%	50%	46%
	Female	Count	177	147	30
			50%	50%	54%
Total		Count	352	296	56
AGE	20-29	Count	85	77	8
			24%	26%	14%
	30-39	Count	208	175	33
			59%	59%	59%
	40-49	Count	47	34	13
			13%	11%	23%
	50+	Count	12	10	2
			3%	3%	4%
Total		Count	352	296	56

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

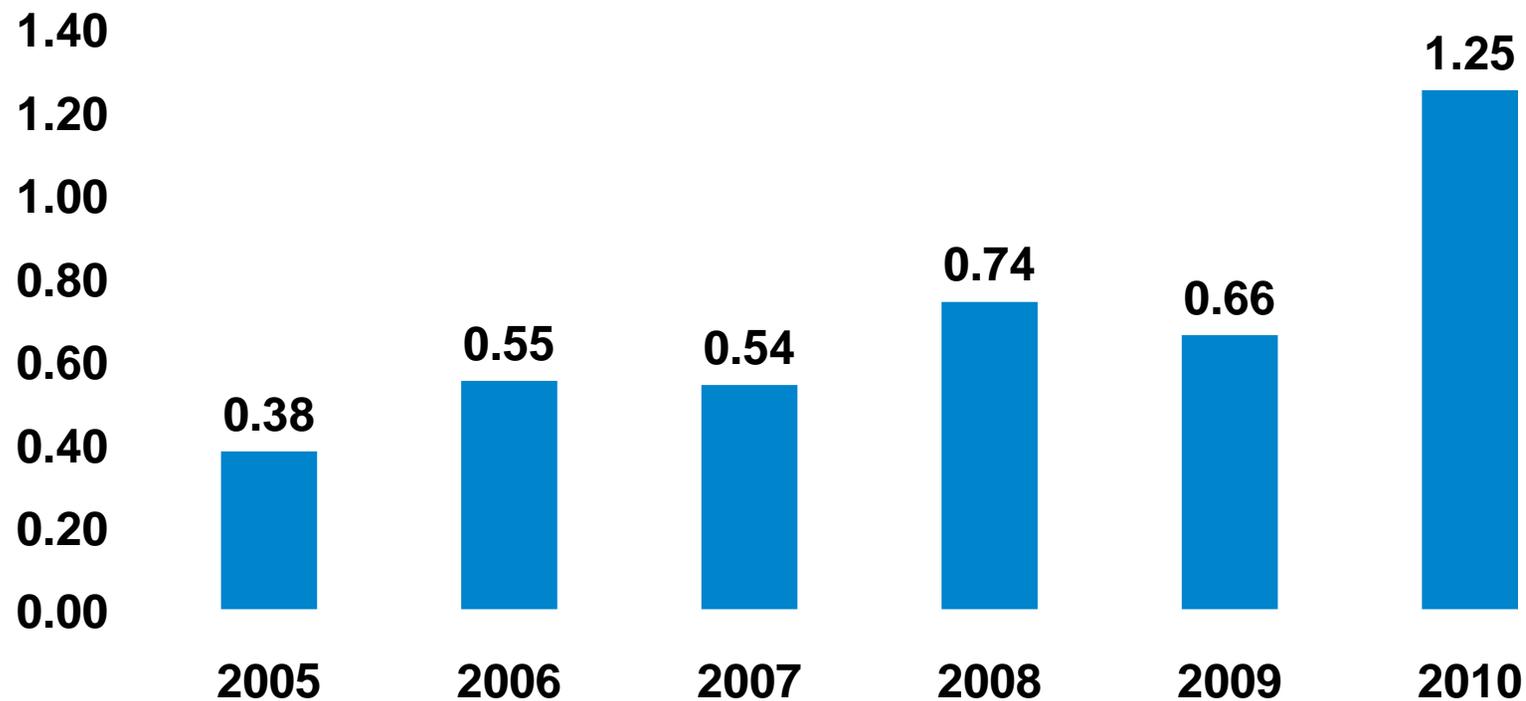
Repeat Visitors Last Trip

n = 56

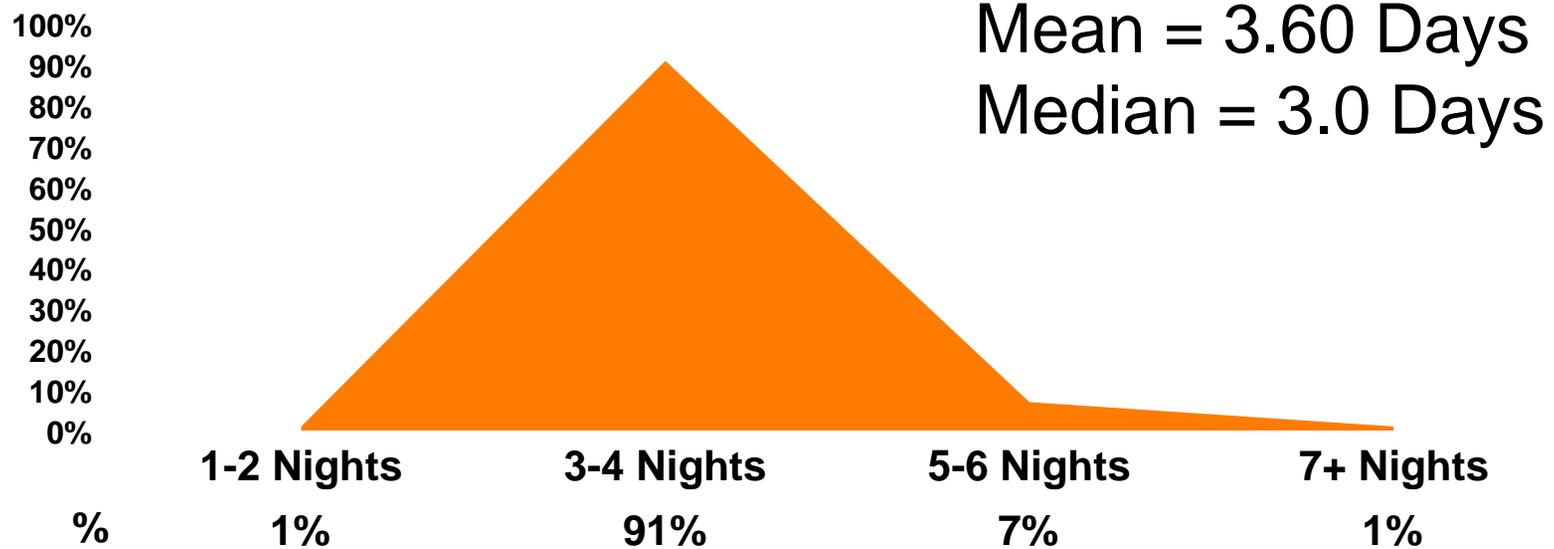


- The average repeat visitor has been to Guam 3.4 times.
- A little less than half of the repeat visitors have been to Guam within the last 2 years.

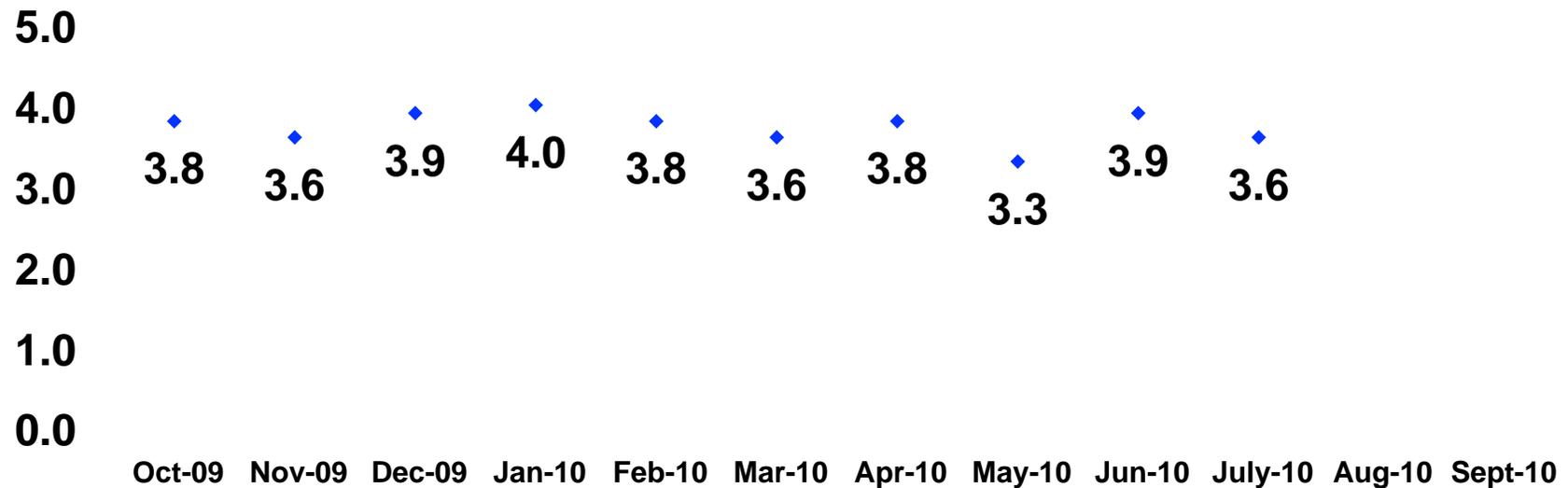
Average Number Overnight Trips (2004-2010) (2 nights or more)



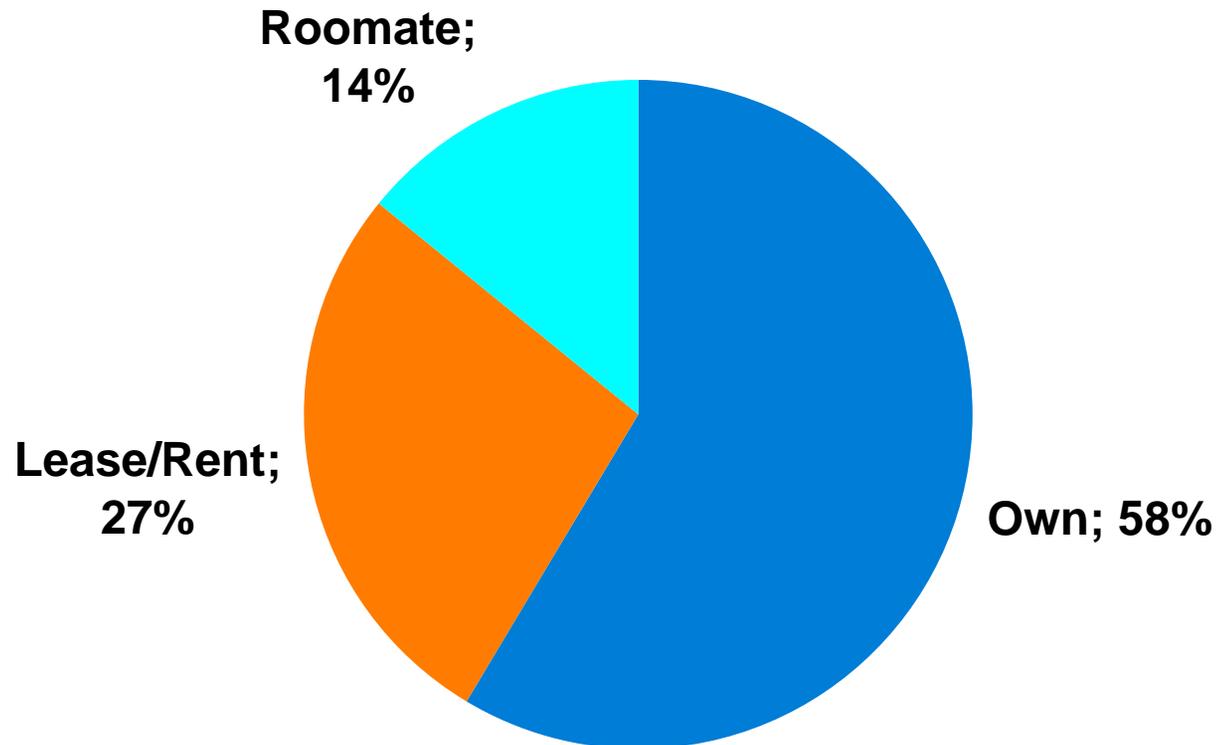
Length of Stay



Average Length of Stay



Living Accommodations

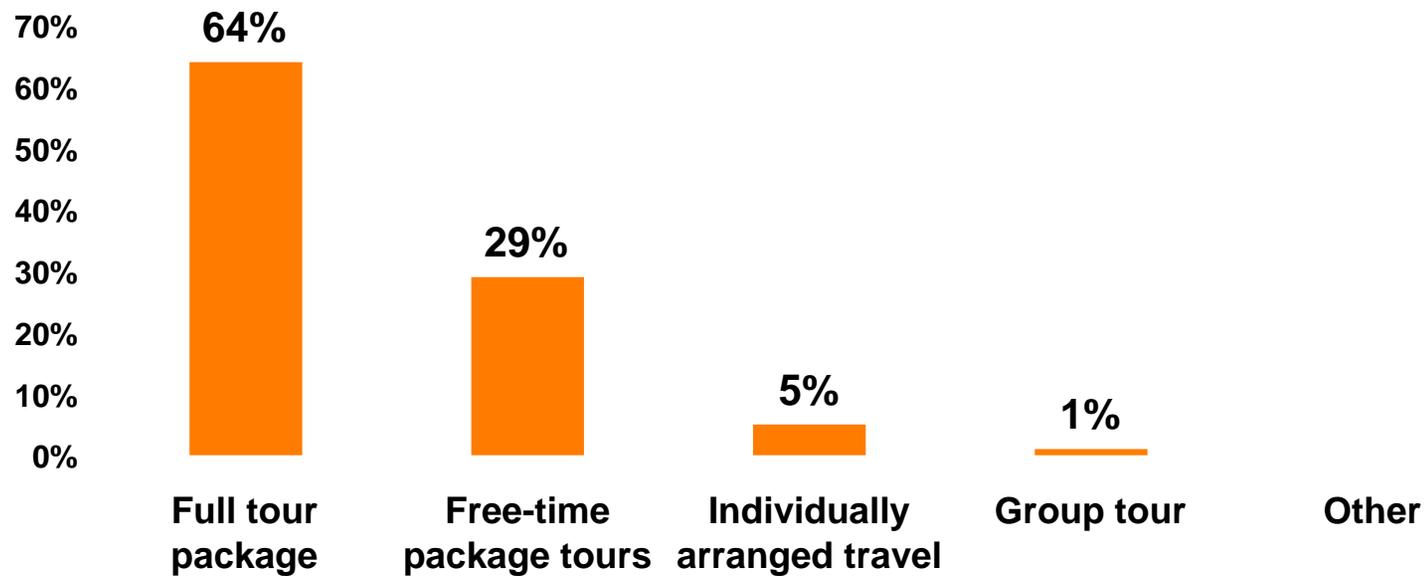


Occupation by Income

	TOTAL	GENDER		AGE				
		Male	Female	20-29	30-39	40-49	50+	
PERSONAL INCOME <KW24.0M	Count	19	6	13	9	8	1	1
		6%	3%	8%	11%	4%	2%	8%
KW24.0M-KW48.0M	Count	114	54	60	42	64	6	2
		33%	31%	36%	52%	32%	13%	17%
KW48.0M-KW72.0M	Count	85	50	35	9	57	14	5
		25%	29%	21%	11%	28%	30%	42%
KW72.0M+	Count	109	56	53	14	67	24	4
		32%	33%	31%	17%	33%	52%	33%
Refused	Count	14	6	8	7	6	1	
		4%	3%	5%	9%	3%	2%	
Total	Count	341	172	169	81	202	46	12

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

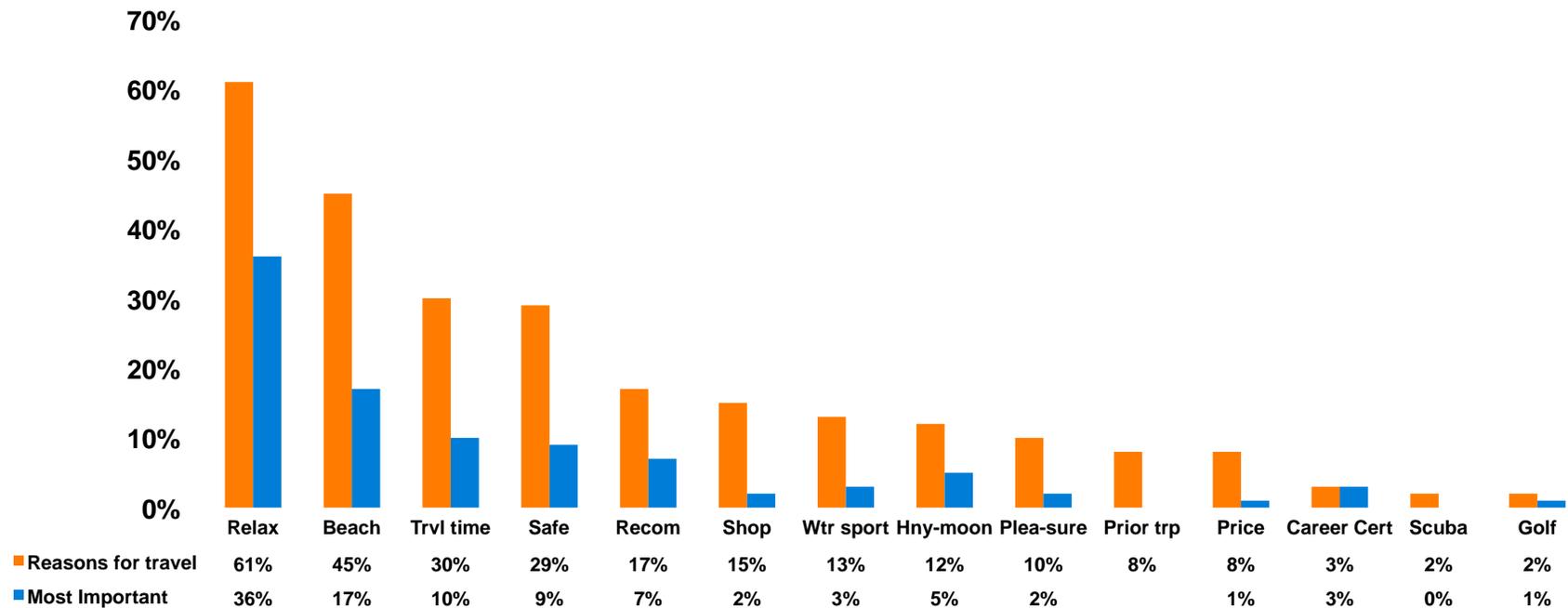


Accommodation by Income

Average length of stay: 3.60 days

	TOTAL	PERSONAL INCOME				
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29 White Collar-Office	34%	26%	41%	36%	31%	7%
Self-employed	16%	32%	10%	24%	16%	
Prof/Specialist/Tech	12%	5%	13%	6%	18%	
Homemaker	10%	11%	4%	12%	12%	29%
Professor/Teacher	6%		5%	6%	7%	
Student	5%	11%	2%	1%	5%	36%
Service worker	4%	5%	9%	1%	3%	
Manager	4%		4%	5%	6%	
Free-lancer	3%	11%	4%		1%	
Sales/Clerical	2%		4%	2%	1%	
Govt-Exec	2%		2%	5%		
Unemployed	1%		1%			21%
Govt-Mgr	1%		1%		1%	
Skilled worker	1%		1%		1%	
Govt - Office/non-mgr	0%		1%			
Retired	0%					7%
Judicial	0%			1%		
Other	0%			1%		
Total Count	349	19	114	85	108	14

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	
			20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	61%	58%	62%	64%	50%	57%	64%
	Beautiful seas, beaches, tropical climate	45%	42%	47%	47%	42%	42%	49%
	Short travel time	30%	22%	34%	26%	33%	25%	34%
	It is a safe place to spend a vacation	29%	27%	29%	23%	58%	26%	32%
	Recommendation of friend, relative, travel agency	17%	21%	16%	6%	33%	15%	19%
	Shopping	15%	18%	15%	11%	8%	14%	16%
	Water sports	13%	22%	9%	13%	8%	11%	15%
	Honeymoon	12%	19%	12%	4%		16%	8%
	Pleasure	10%	11%	9%	4%	33%	6%	13%
	A previous visit	8%	4%	9%	17%		9%	8%
	Price of the tour package	8%	5%	9%	6%	17%	9%	7%
	Career certification or testing	3%	8%	2%		8%	5%	2%
	Other	2%	2%	2%	2%	8%	2%	2%
	SCUBA diving	2%	2%	1%	4%		1%	2%
	To golf	2%		1%	6%		3%	1%
	My company sponsored me	2%	5%	1%			1%	3%
	Organized Sporting Activity	2%	4%	1%				3%
	Company or Business trip	1%		1%	6%		1%	2%
	Promotional materials from GVB	1%	1%	1%	2%		2%	1%
	To visit friends or relatives	1%		1%		8%	1%	1%
	Convention, Conference, Trade show	0%	1%					1%
	To get married or Attend wedding	0%	1%				1%	
Total	Cases	352	85	208	47	12	175	177

Motivation by Income

	TOTAL	PERSONAL INCOME				Refused
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.5 Just to relax	61%	63%	63%	65%	56%	36%
Beautiful seas, beaches, tropical climate	45%	5%	51%	42%	52%	29%
Short travel time	30%	16%	29%	27%	35%	21%
It is a safe place to spend a vacation	29%	11%	32%	27%	31%	21%
Recommendation of friend, relative, travel agency	17%	21%	13%	21%	15%	29%
Shopping	15%	5%	14%	20%	13%	14%
Water sports	13%	11%	17%	9%	11%	21%
Honeymoon	12%	37%	15%	11%	5%	21%
Pleasure	10%	21%	10%	9%	8%	14%
A previous visit	8%		4%	7%	17%	7%
Price of the tour package	8%	16%	7%	11%	6%	7%
Career certification or testing	3%	5%	2%	2%	6%	7%
Other	2%		3%	5%	1%	
SCUBA diving	2%	5%	3%	1%	1%	
To golf	2%	5%	1%	4%	1%	
My company sponsored me	2%	5%	3%		2%	
Organized Sporting Activity	2%	5%	2%		1%	14%
Company or Business trip	1%			2%	3%	
Promotional materials from GVB	1%		2%		1%	7%
To visit friends or relatives	1%	5%			1%	7%
Convention, Conference, Trade show	0%		1%			
To get married or Attend wedding	0%	5%				
Total Cases	352	19	114	85	109	14

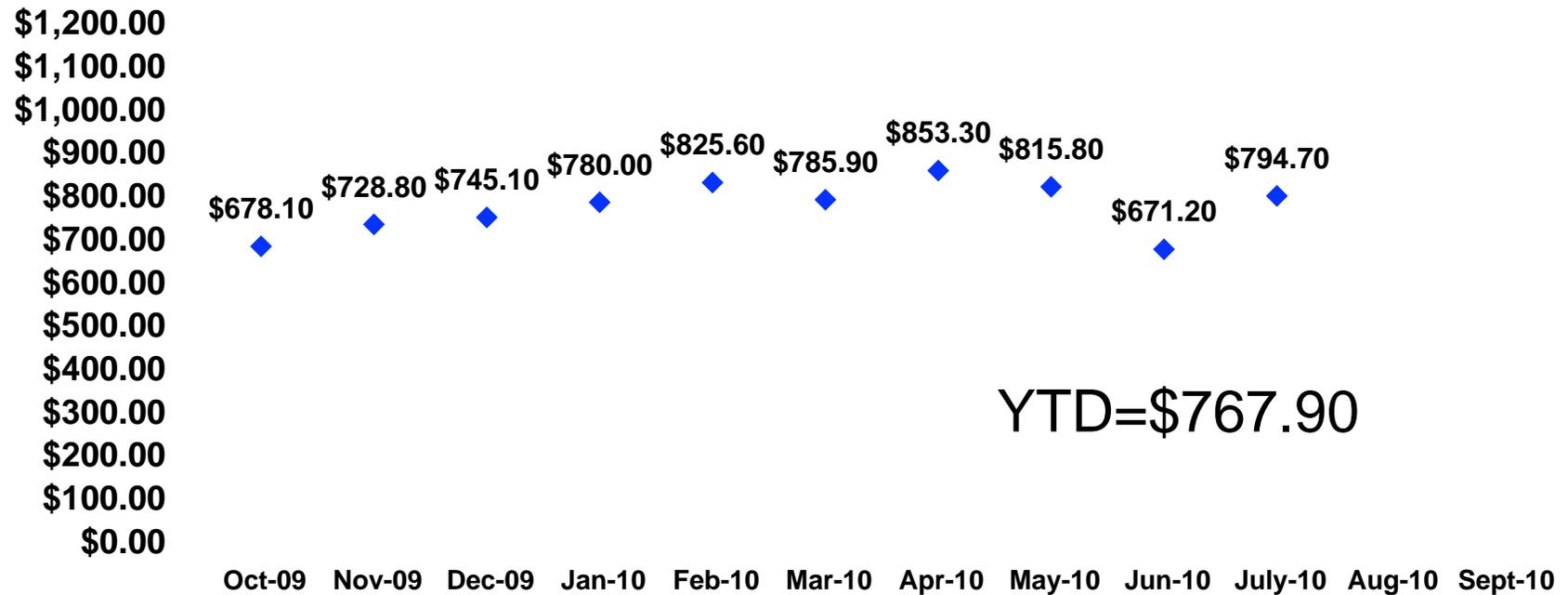
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1216.82/US\$1

- \$2,041.20 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,094 = maximum (highest amount recorded for the entire sample)
- \$794.70 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

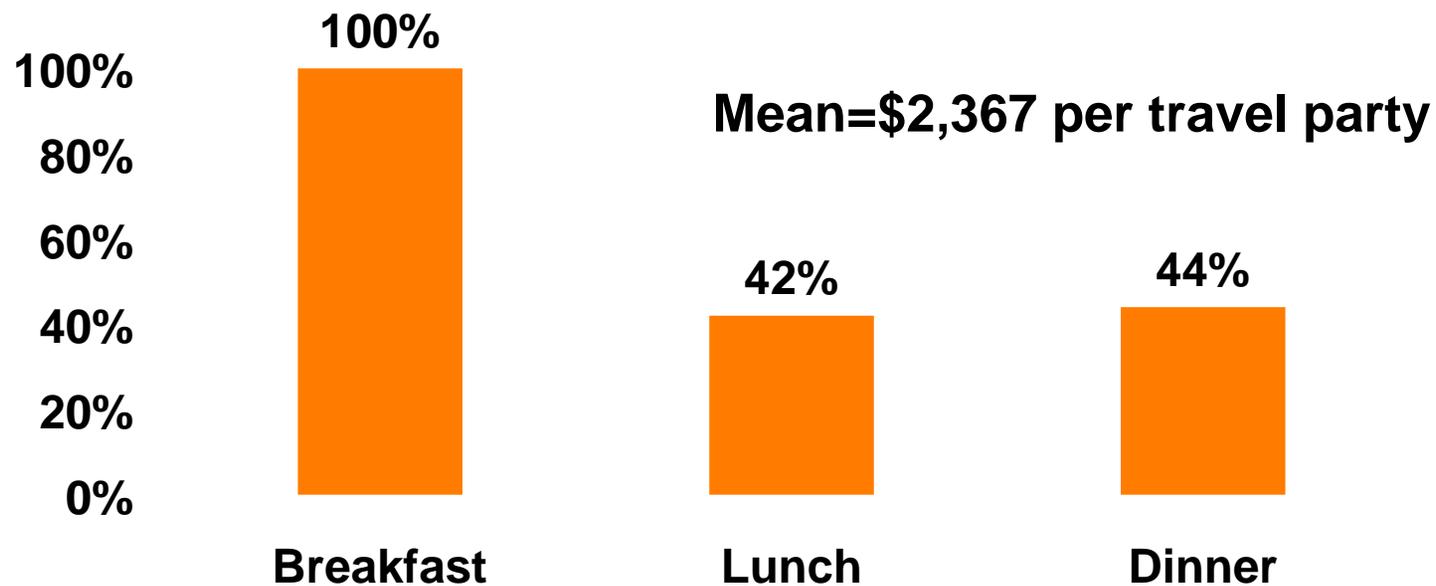
KW1216.82=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,171
Air & Accommodation w/ daily meal package	\$2,367
Air only	-
Accommodation only	\$735
Accommodation w/ daily meal only	\$610
Food & Beverages in Hotel	\$82
Ground transportation - Korea	\$60
Ground transportation - Guam	\$59
Optional tours/ activities	\$331
Other expenses	\$236
Total Prepaid	\$2,041

Prepaid Meal Breakdown

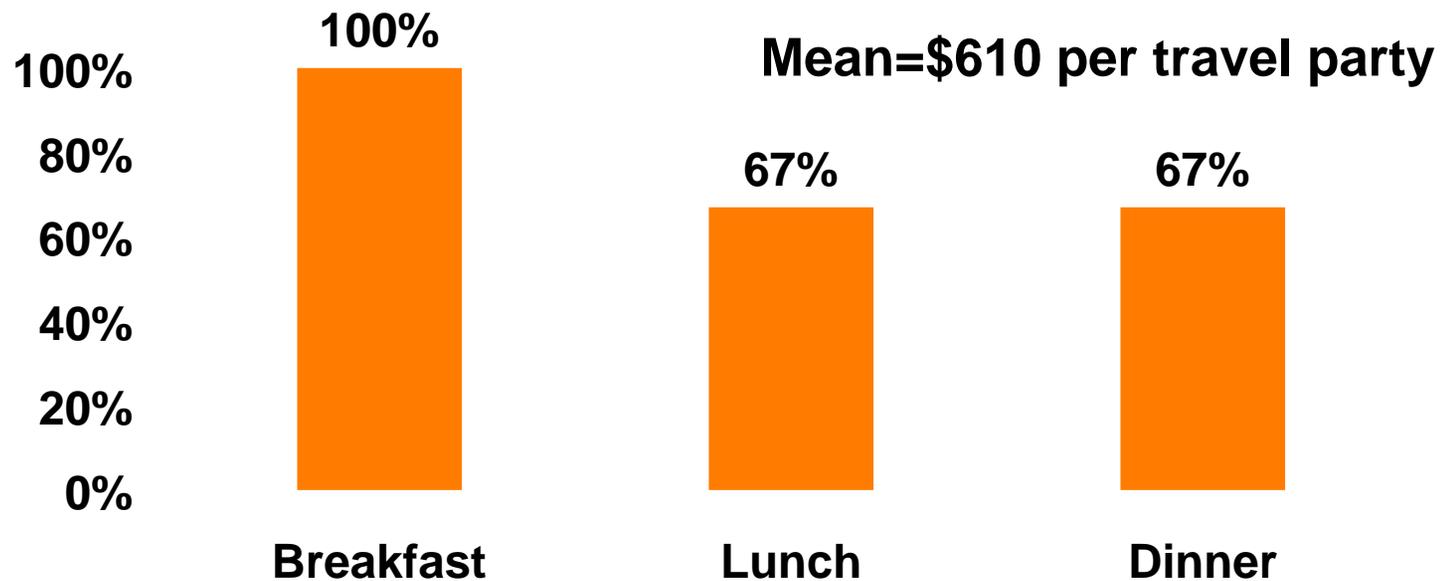
Air/ Accommodations with Daily Meal Package
n=178



Prepaid Meal Breakdown

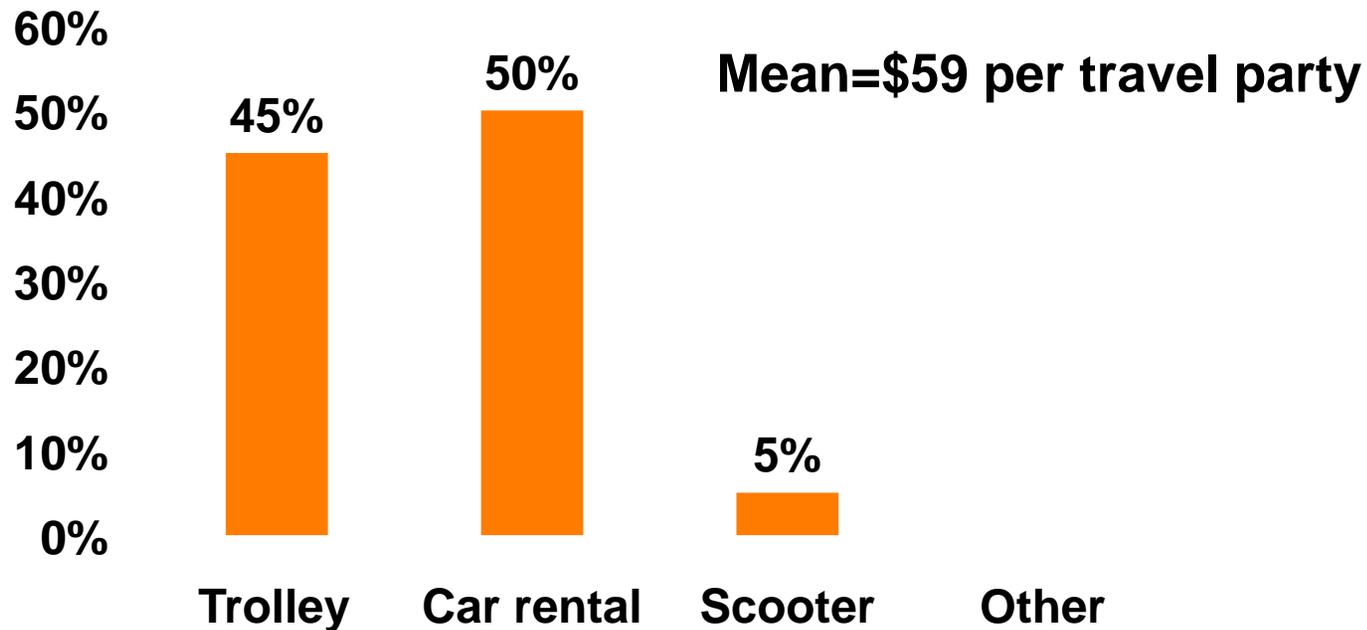
Accommodations with Daily Meal Package

n=3



Prepaid Ground Transportation

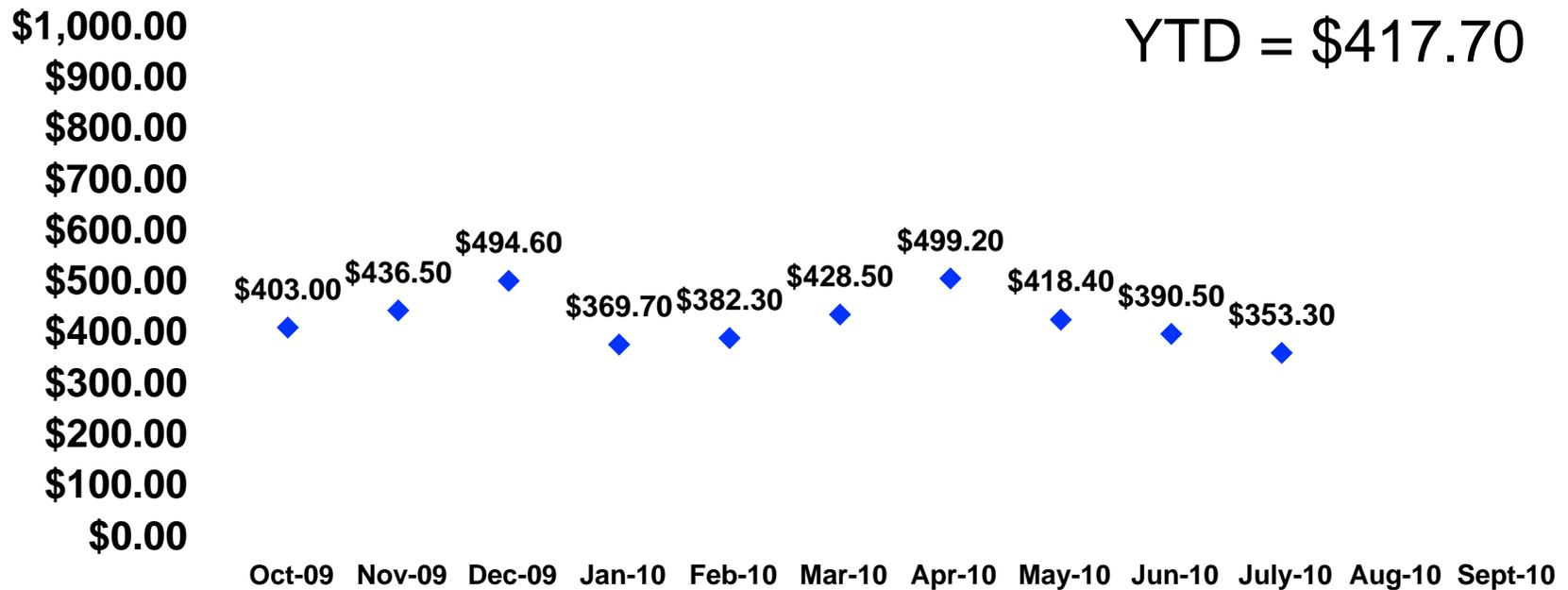
n=20



On-Island Expenditures

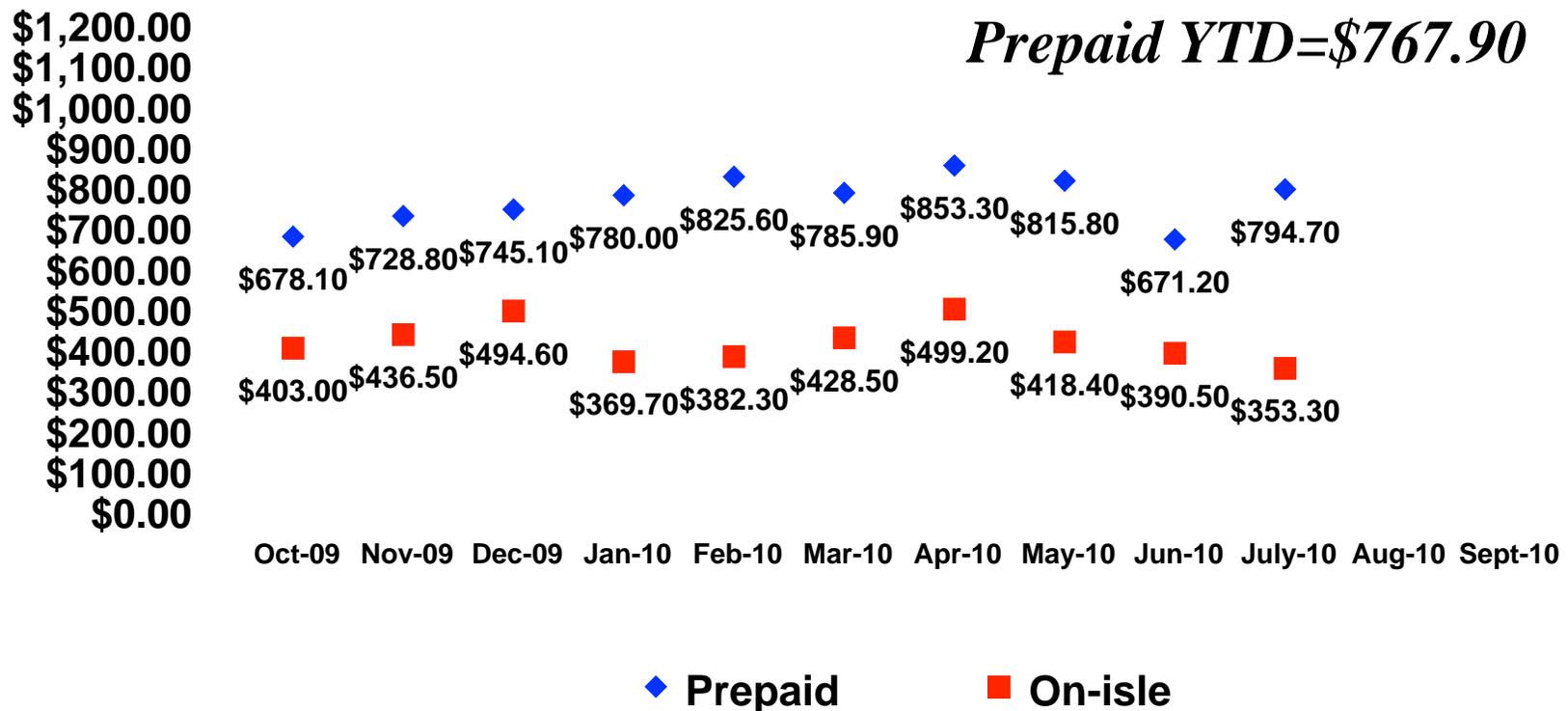
- \$890.00 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$353.30 = overall mean average per person on-island expenditure

On-Island Expenditures



Prepaid/On-Island Expenditures

On-Isle YTD = \$417.70
Prepaid YTD = \$767.90



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	\$889.97	\$936.19	\$844.27	\$746.21	\$912.70	\$1,182.65	\$778.75	\$747.72	\$909.02	\$1,022.31	\$135.50
Median	\$521	\$570	\$500	\$518	\$530	\$1,000	\$540	\$500	\$500	\$540	\$131

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$47.37	\$42.22	\$52.45	\$37.91	\$53.31	\$46.81	\$13.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$24.36	\$21.52	\$27.17	\$24.09	\$25.03	\$23.83	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$41.60	\$39.76	\$43.41	\$49.60	\$38.30	\$40.43	\$46.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$115.38	\$129.61	\$101.32	\$91.95	\$105.95	\$182.55	\$181.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$213.06	\$244.85	\$181.63	\$156.08	\$207.78	\$357.70	\$141.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$107.29	\$125.94	\$88.75	\$82.32	\$129.18	\$67.49	\$62.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$20.80	\$20.28	\$21.32	\$19.15	\$22.45	\$19.36	\$9.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$306.07	\$306.25	\$305.90	\$286.18	\$303.61	\$407.57	\$92.17
	Median	\$60	\$70	\$60	\$40	\$60	\$150	\$15
TOTAL ON ISLAND	Mean	\$889.97	\$936.19	\$844.27	\$747.29	\$910.95	\$1,138.30	\$564.33
	Median	\$521	\$570	\$500	\$500	\$505	\$750	\$365

On-Island Expenditures

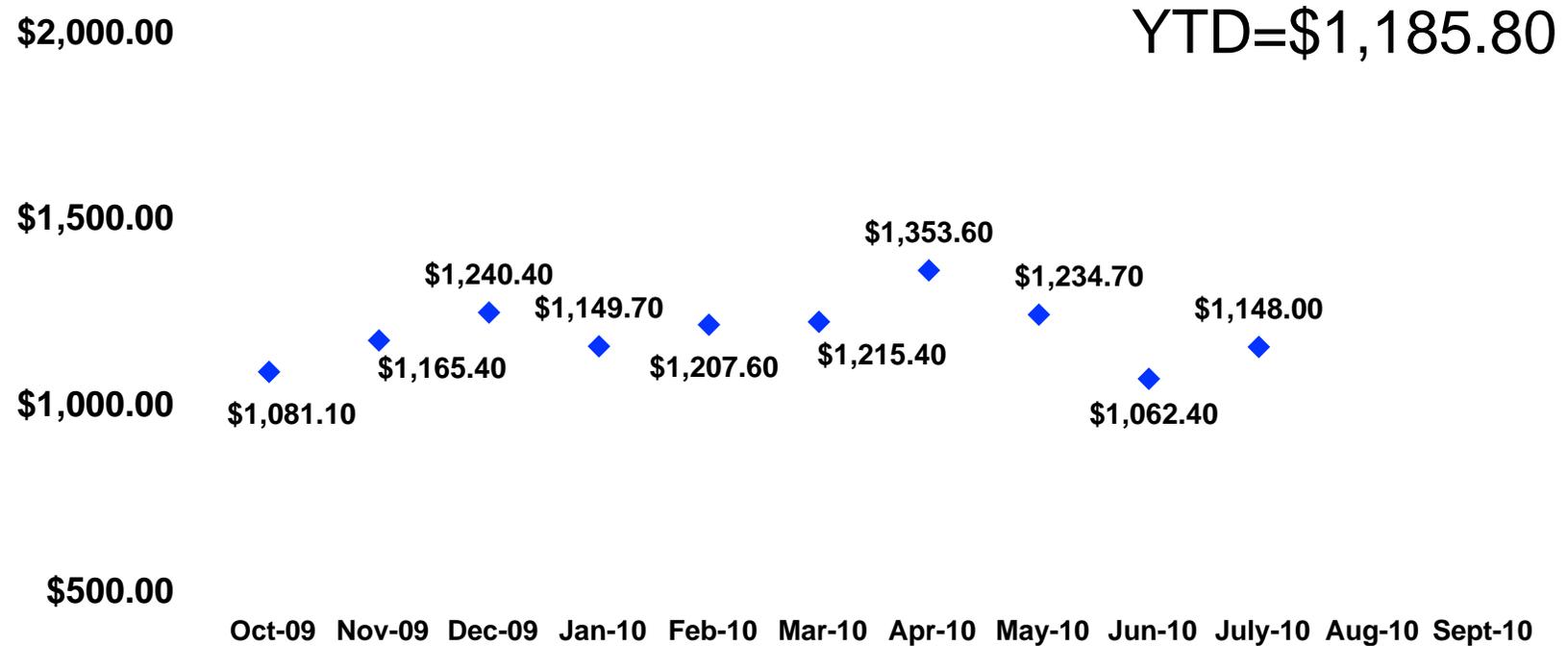
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$41.78	\$76.91
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$25.83	\$16.61
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$39.08	\$54.89
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$126.43	\$57.00
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$208.19	\$238.79
	Median	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$105.24	\$118.07
	Median	\$0	\$0
LOCAL TRANS	Mean	\$18.13	\$34.91
	Median	\$0	\$0
OTHER EXP	Mean	\$324.10	\$210.79
	Median	\$60	\$54
TOTAL ON ISLAND	Mean	\$896.33	\$856.36
	Median	\$526	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,148.0 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,938 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

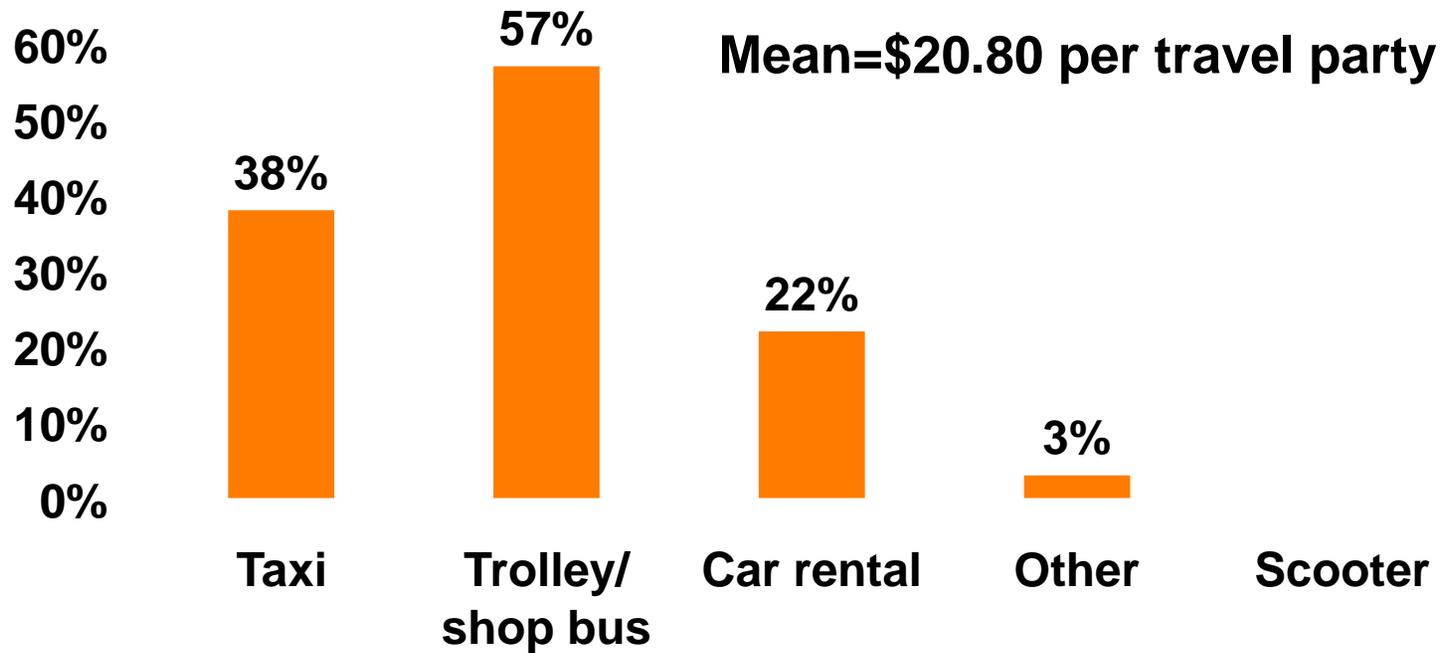


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$47.40
Food & beverage in fast food restaurant/ convenience store	\$24.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$41.60
Optional tours and activities	\$115.40
Gifts/ souvenirs for yourself/companions	\$213.10
Gifts/ souvenirs for friends/family at home	\$107.30
Local transportation	\$20.80
Other expenses not covered	\$306.10
Average Total	\$890.00

Local Transportation

n=108



Guam Airport Expenditures

- \$65.00 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

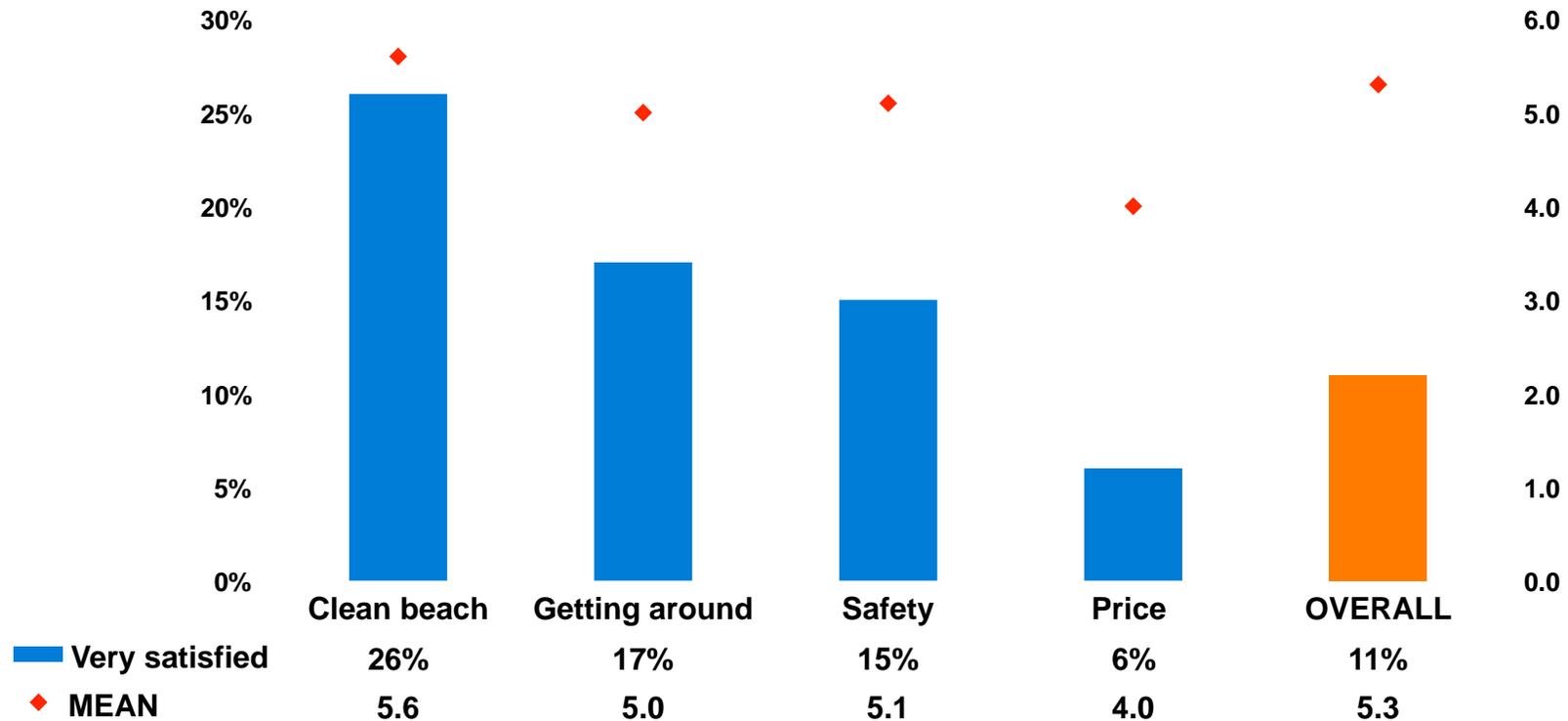
	MEAN \$
Food & Beverages	\$4.30
Gifts/Souvenirs Self	\$33.60
Gifts/Souvenirs Others	\$27.10
Total	\$65.00

SECTION 4 **VISITOR SATISFACTION**

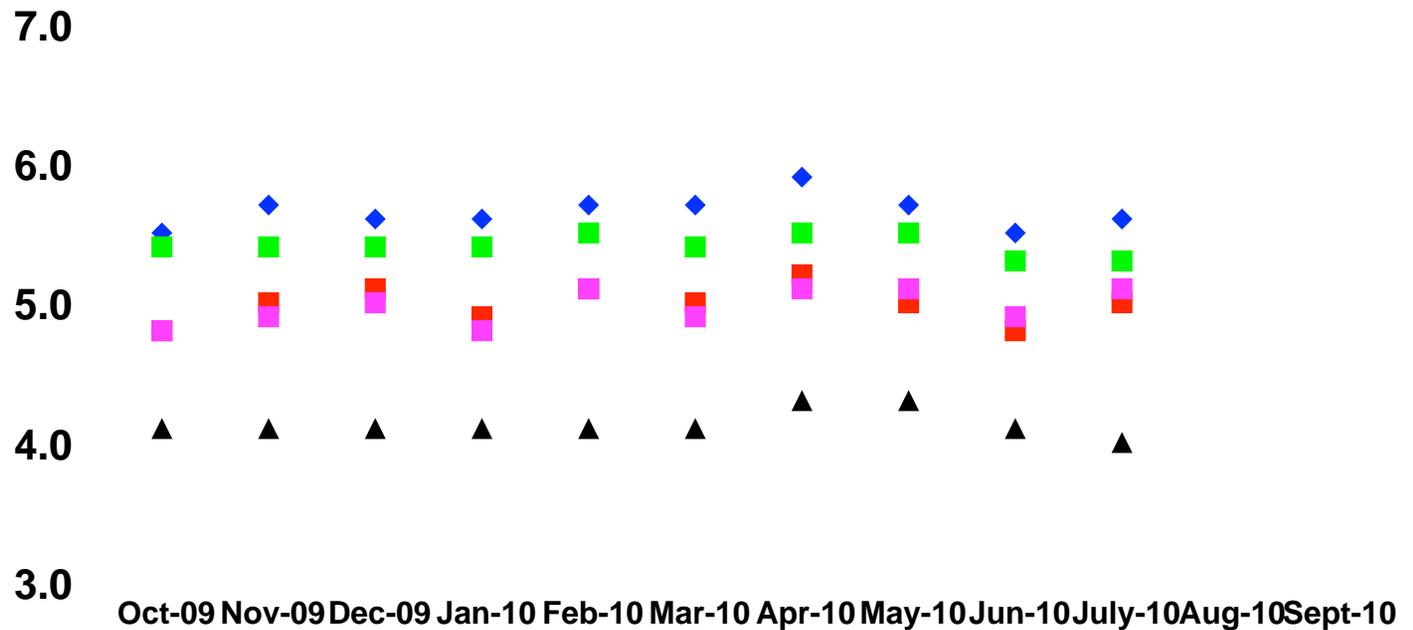
Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Guam Perceptions

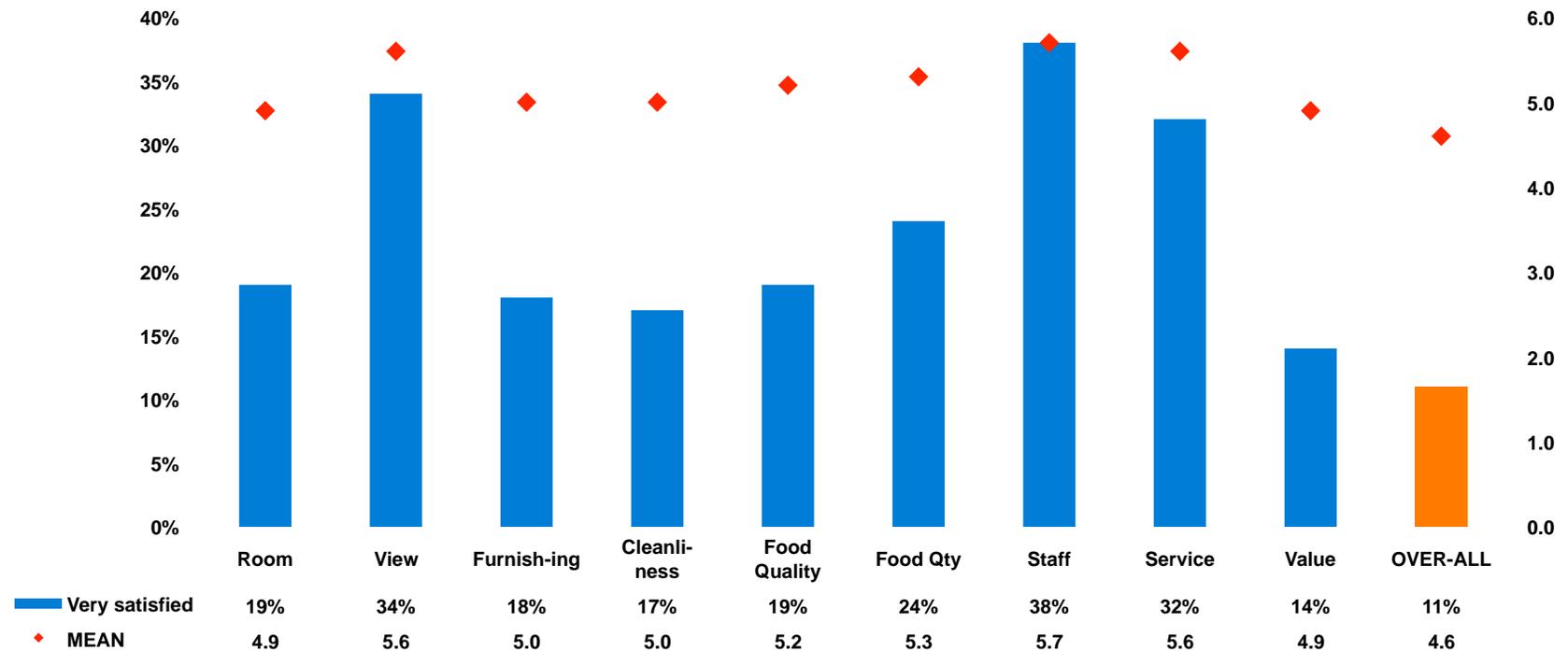


	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	July-10	Aug-10	Sept-10
◆ Clean beach/park	5.5	5.7	5.6	5.6	5.7	5.7	5.9	5.7	5.5	5.6		
■ Ease getting around	4.8	5.0	5.1	4.9	5.1	5.0	5.2	5.0	4.8	5.0		
■ Safe walk night	4.8	4.9	5.0	4.8	5.1	4.9	5.1	5.1	4.9	5.1		
▲ Price	4.1	4.1	4.1	4.1	4.1	4.1	4.3	4.3	4.1	4.0		
■ Overall	5.4	5.4	5.4	5.4	5.5	5.4	5.5	5.5	5.3	5.3		

Quality of Accommodations

7pt Rating Scale

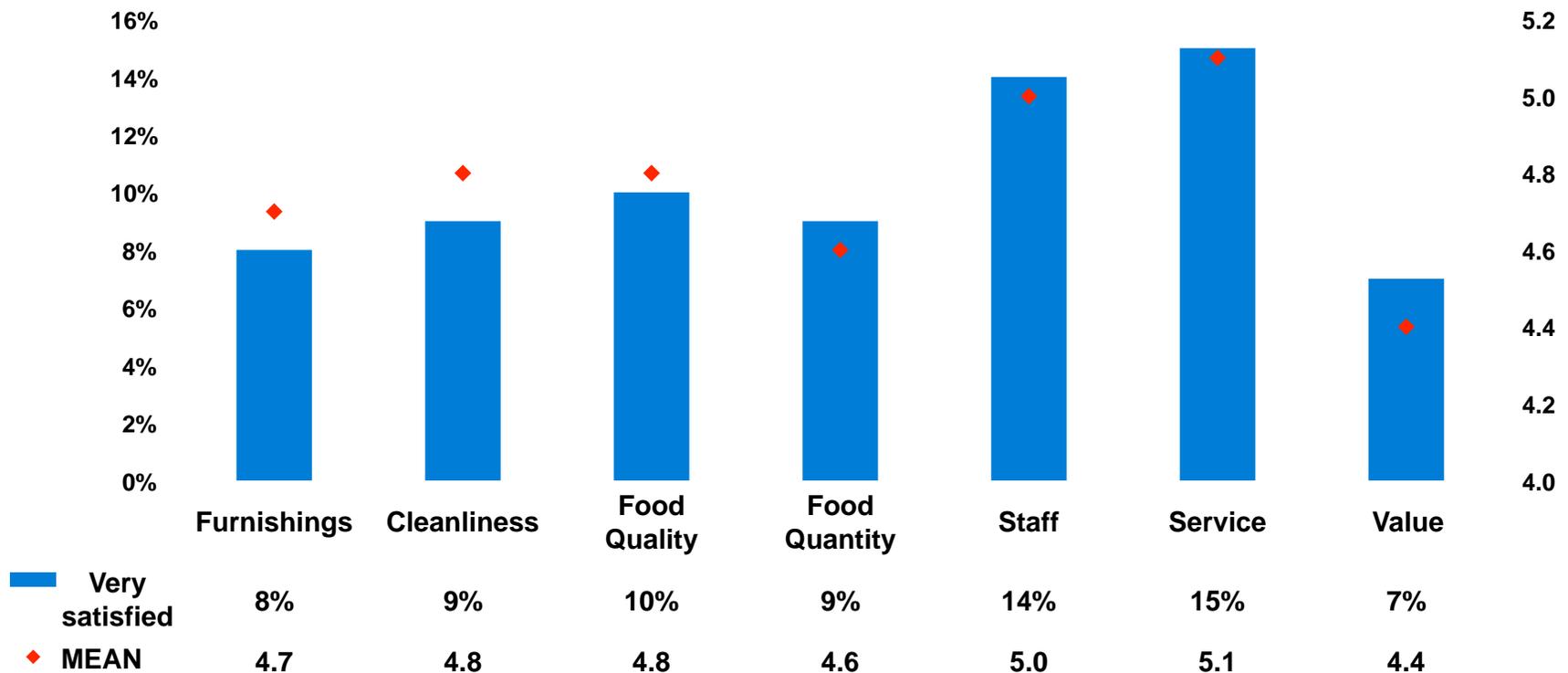
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

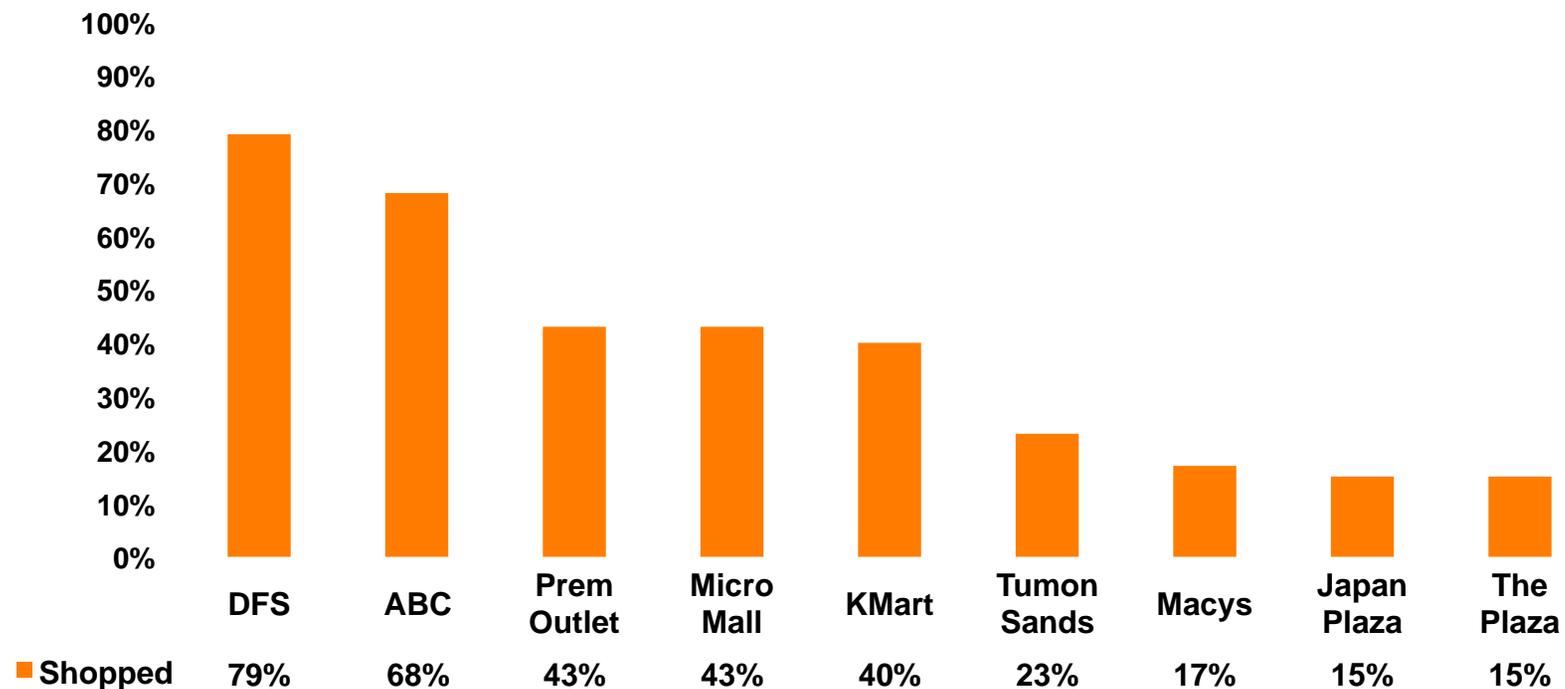
7pt Rating Scale

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

Score of 6 to 7 = **42%**

Score of 4 to 5 = **49%**

Score 1 to 3 = **9%**

MEAN = 5.0

Variety of Shopping

Score of 6 to 7 = **40%**

Score of 4 to 5 = **45%**

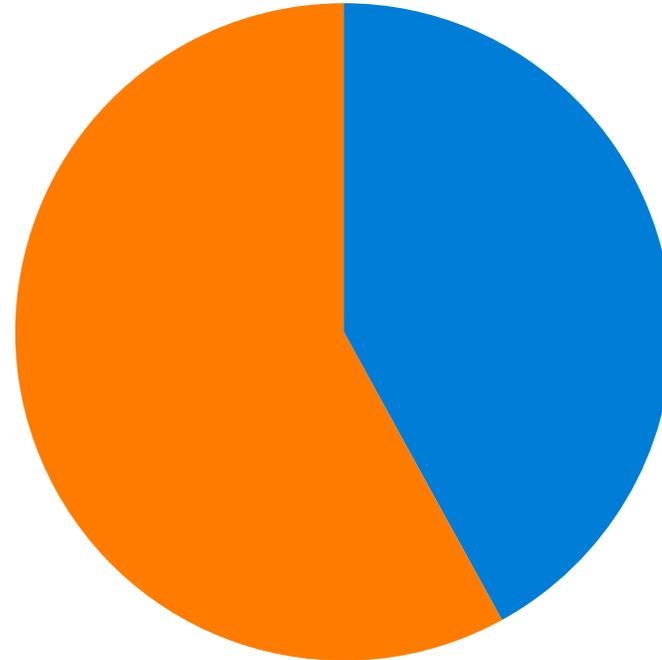
Score 1 to 3 = **15%**

MEAN = 4.9

Optional Tour Participation

- Average number of tours participated in is 1.0

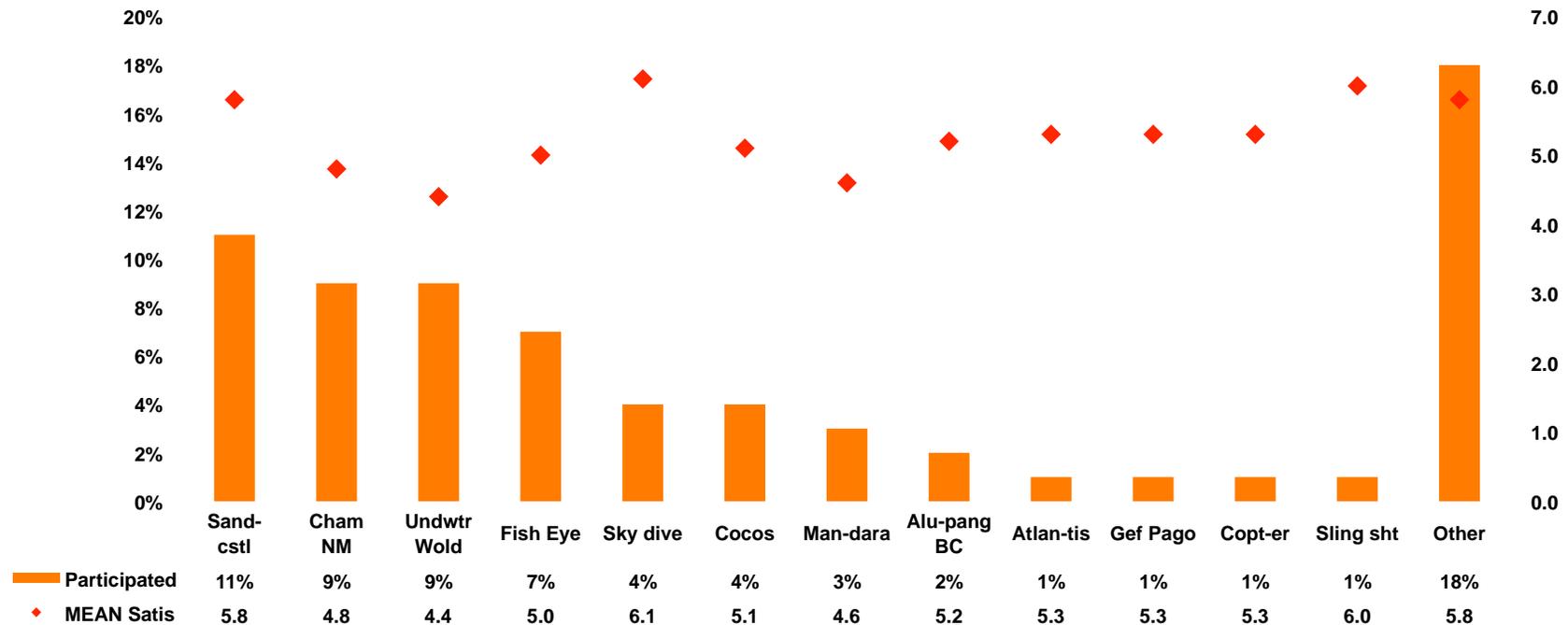
**One or more
58%**



**None
42%**

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 = **41%**

Score of 4 to 5 = **50%**

Score 1 to 3 = **9%**

MEAN = 5.0

Variety of Day Tour

Score of 6 to 7 = **34%**

Score of 4 to 5 = **49%**

Score 1 to 3 = **16%**

MEAN = 4.7

Night Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

r

Quality of Night Tour

Score of 6 to 7 = **23%**

Score of 4 to 5 = **58%**

Score 1 to 3 = **19%**

MEAN = 4.4

Variety of Night Tour

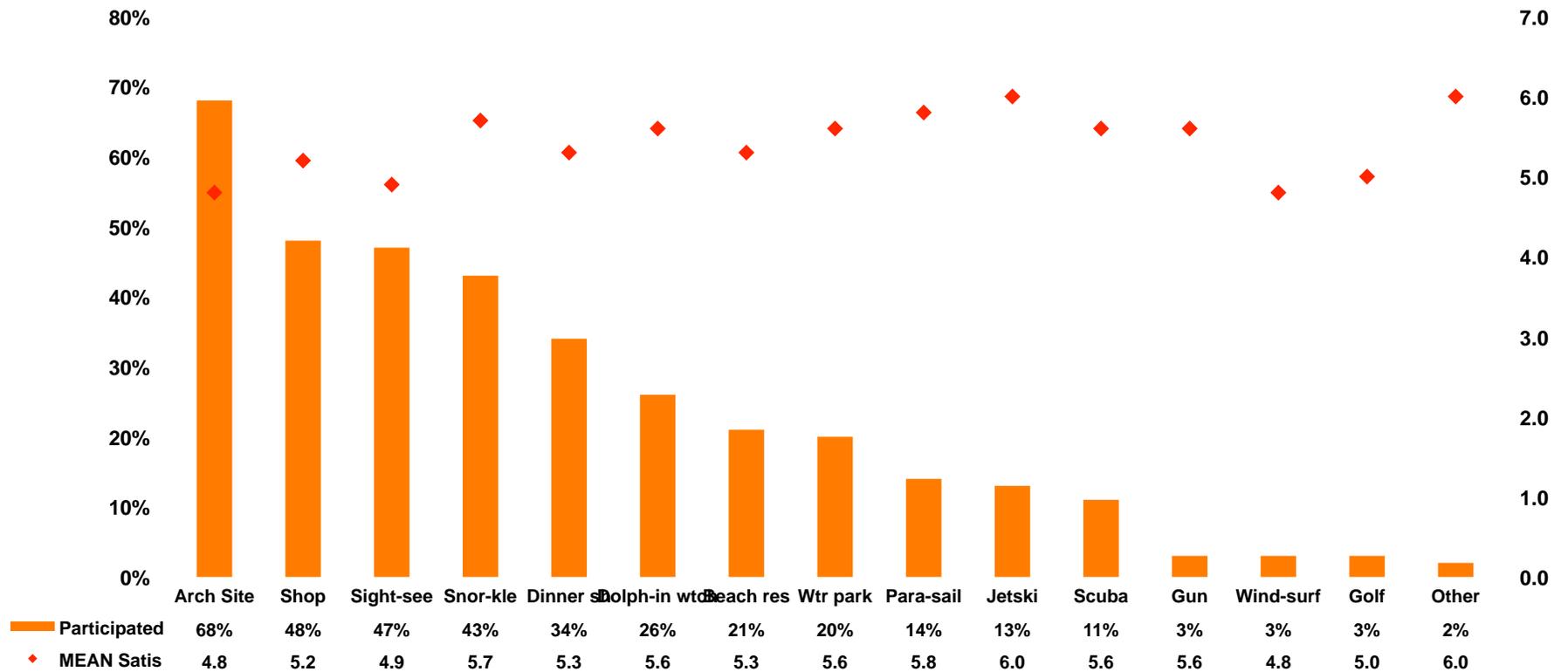
Score of 6 to 7 = **21%**

Score of 4 to 5 = **56%**

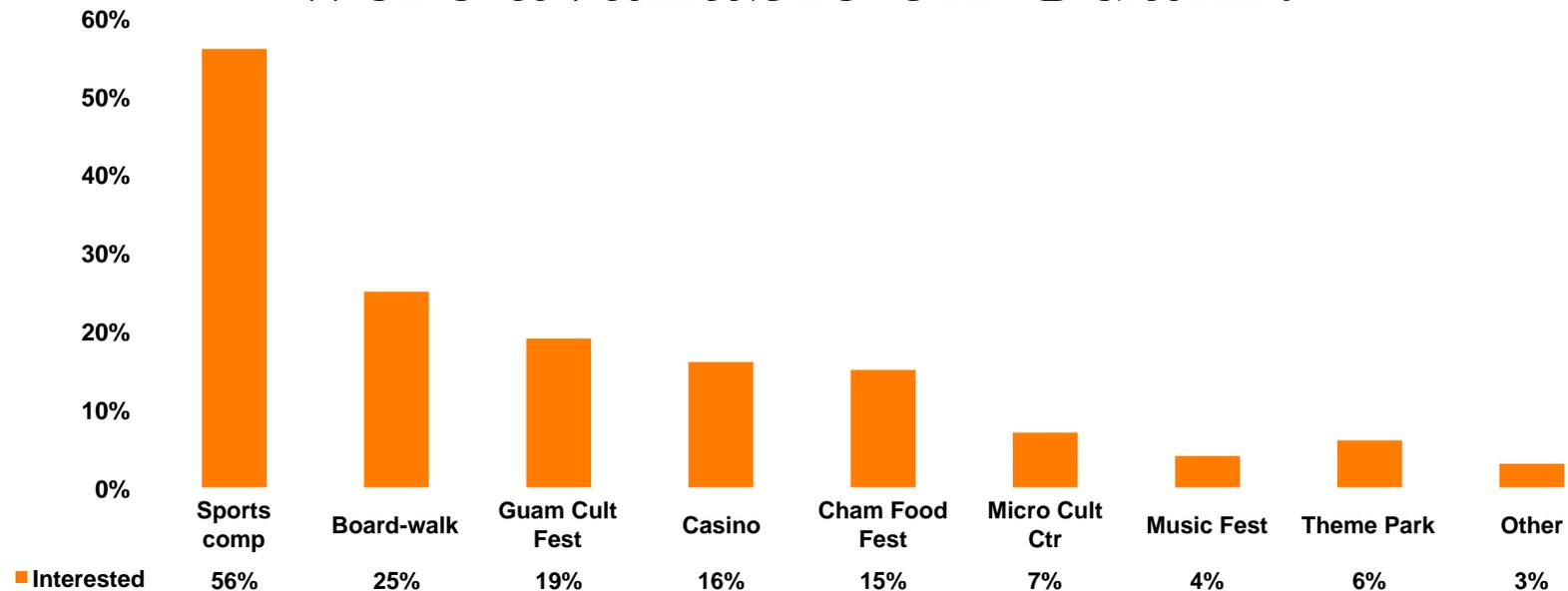
Score 1 to 3 = **22%**

MEAN = 4.3

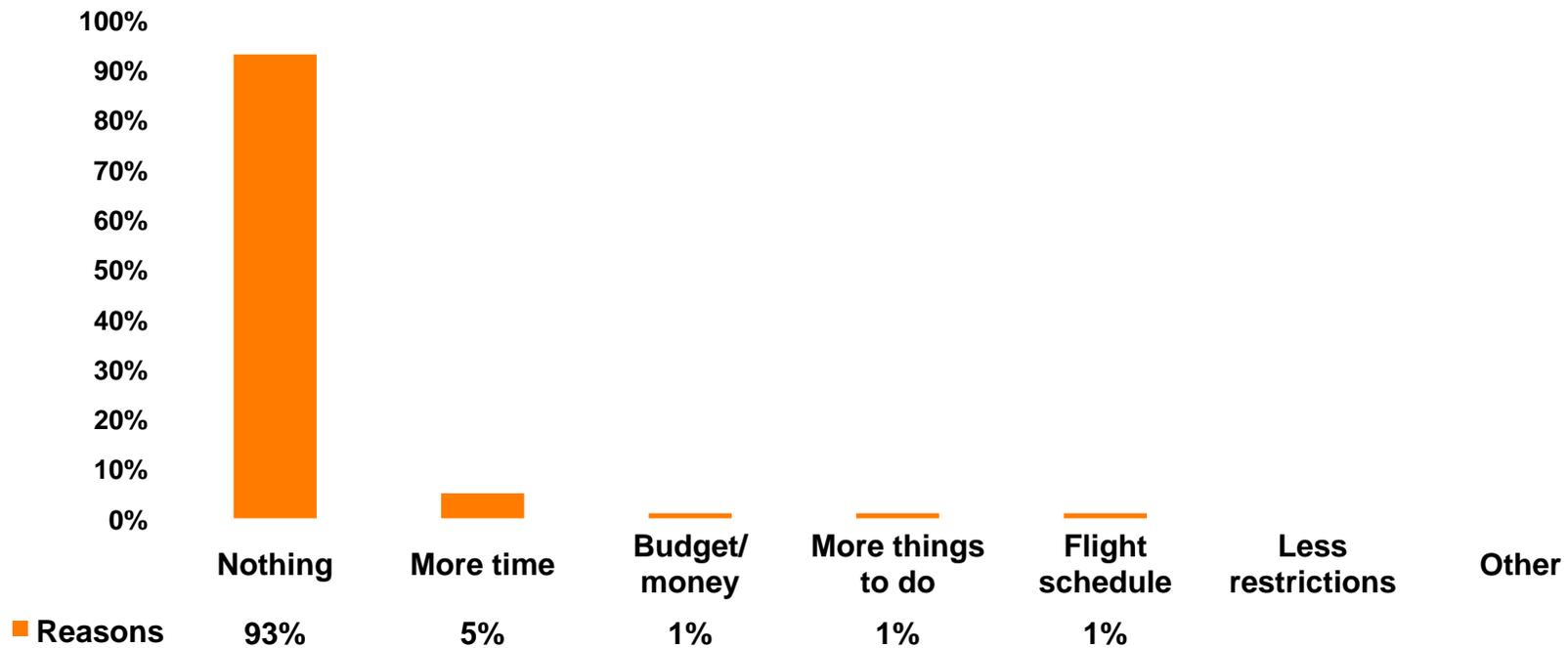
Satisfaction with Other Activities



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



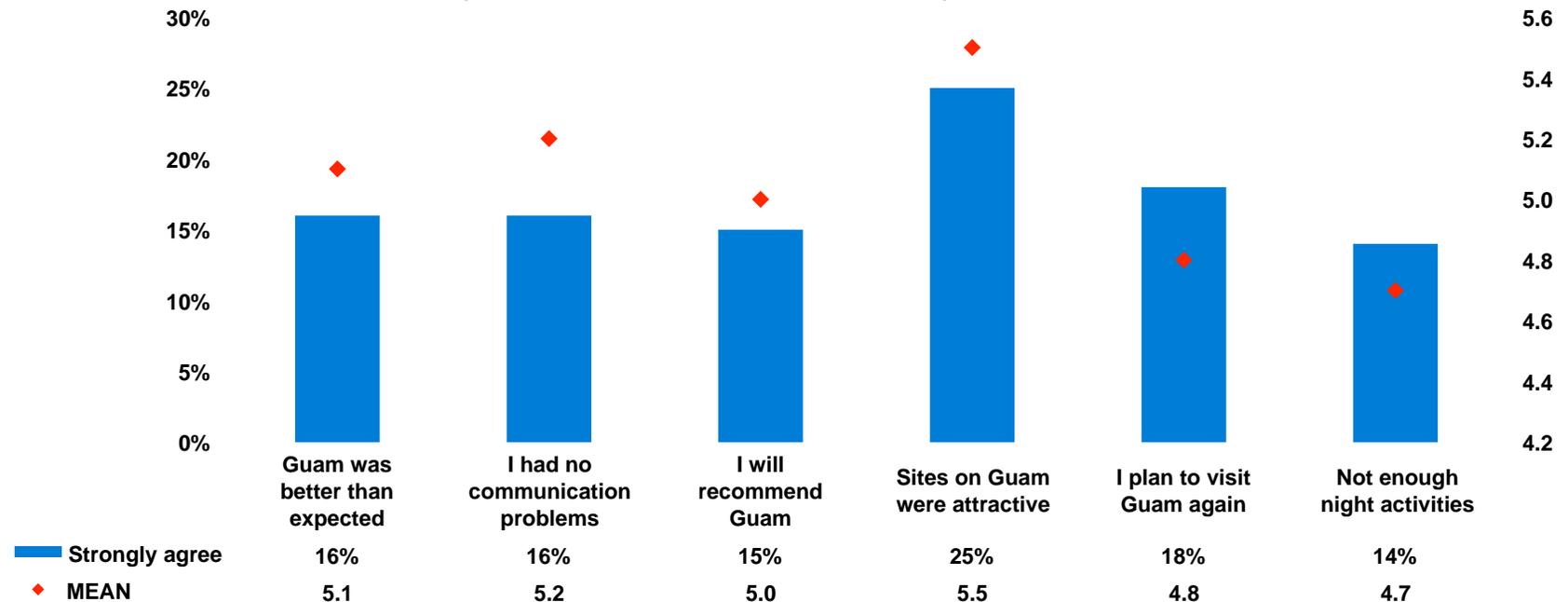
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

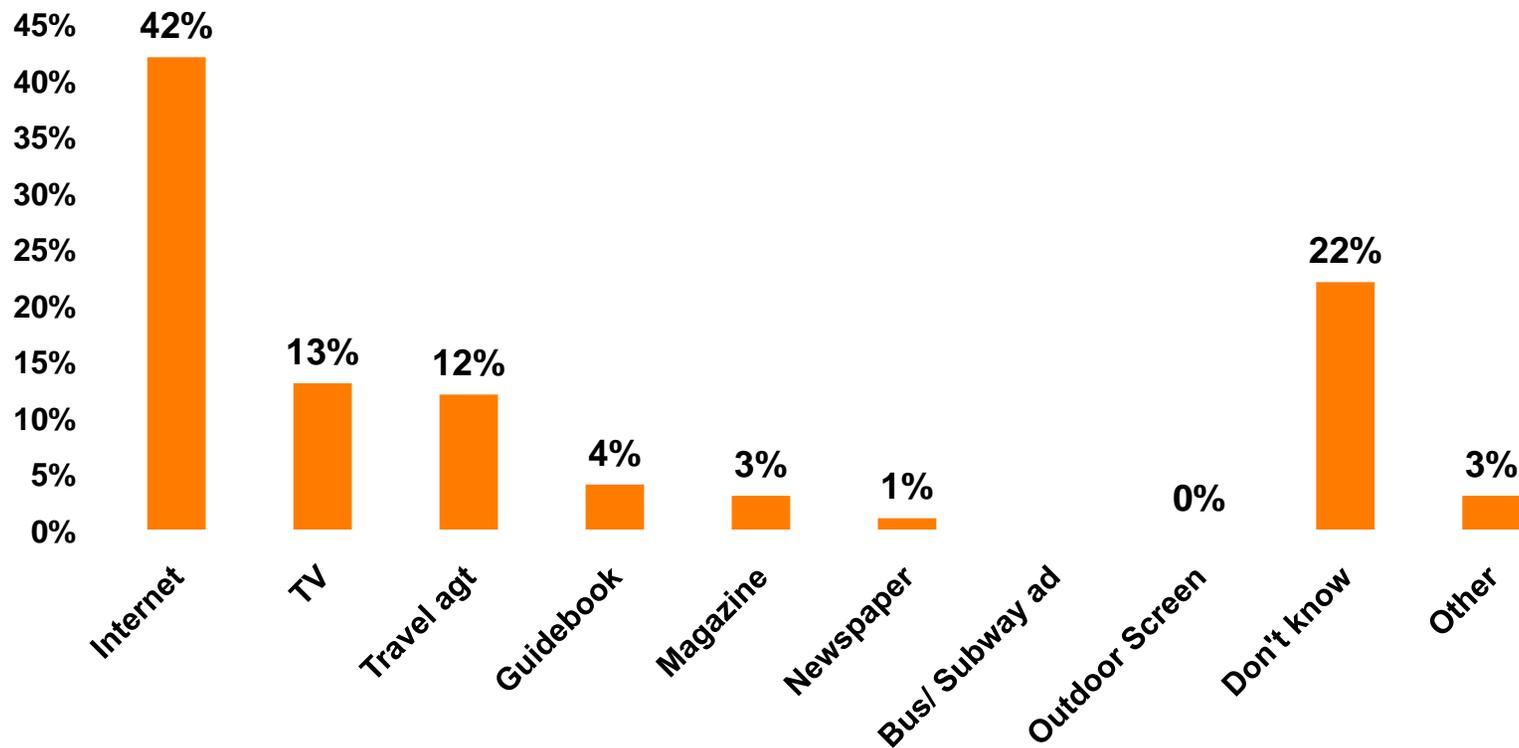
7=Very Satisfied/ 1=Very Dissatisfied



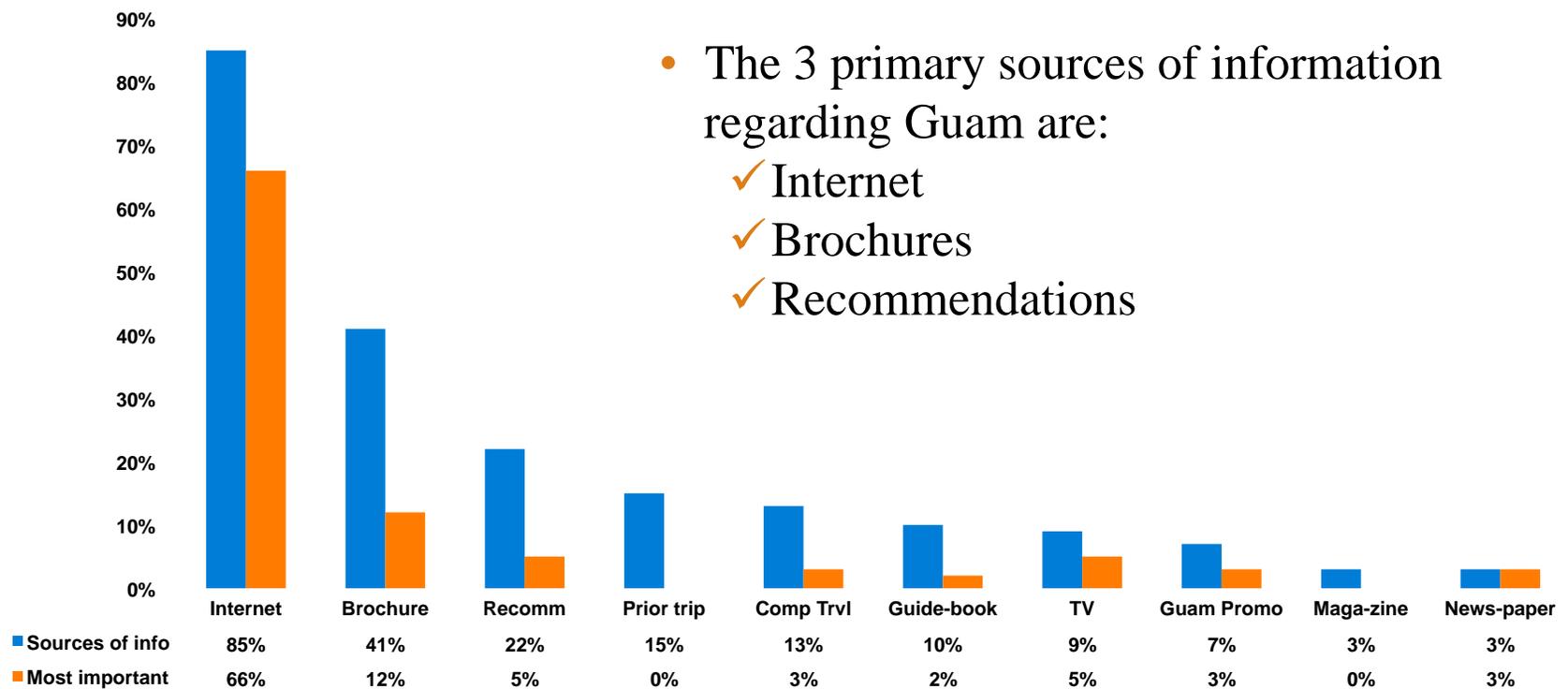
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

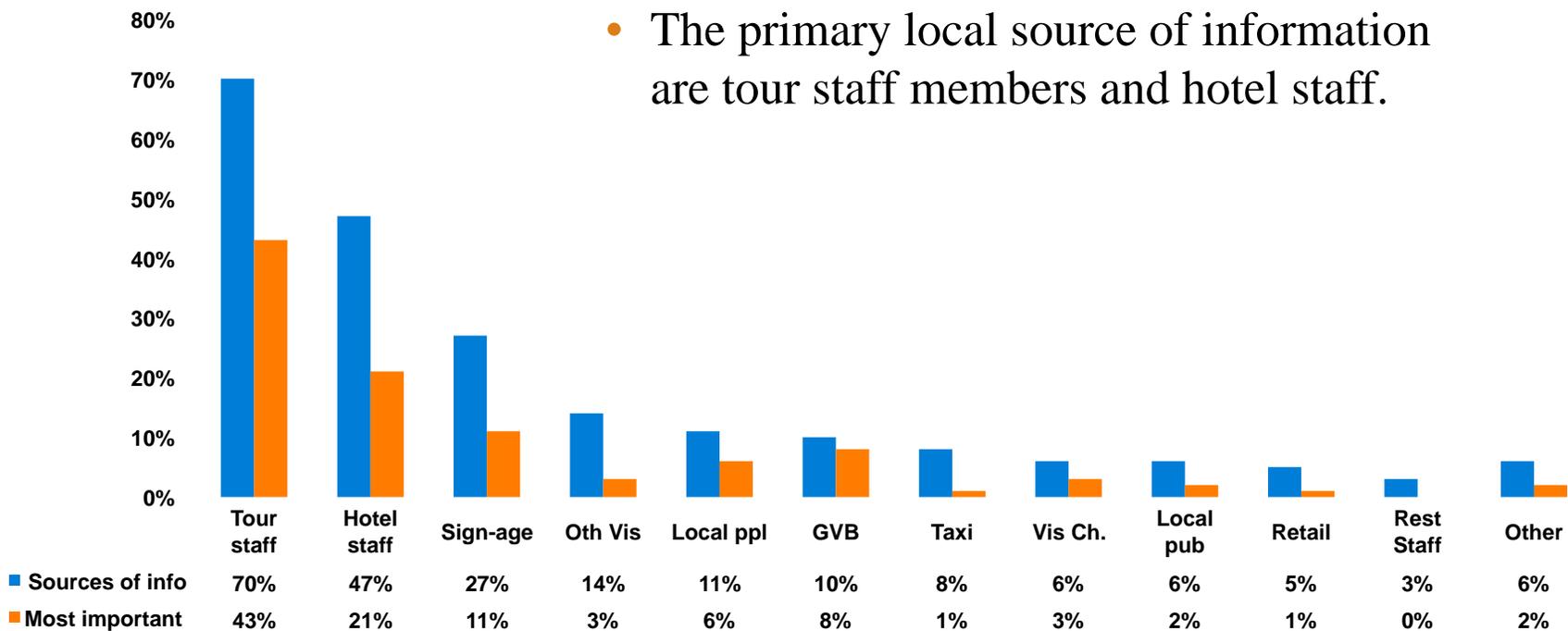


Sources of Information Pre-arrival



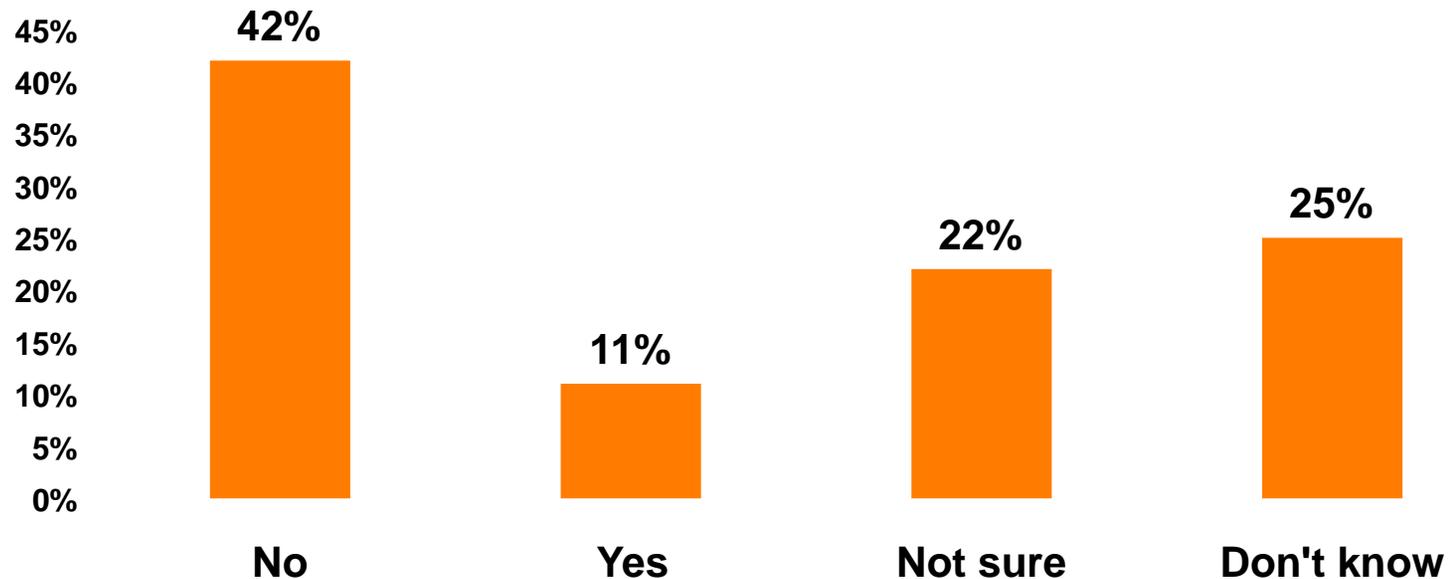
Sources of Information Post-arrival

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



SECTION 6
OTHER ISSUES

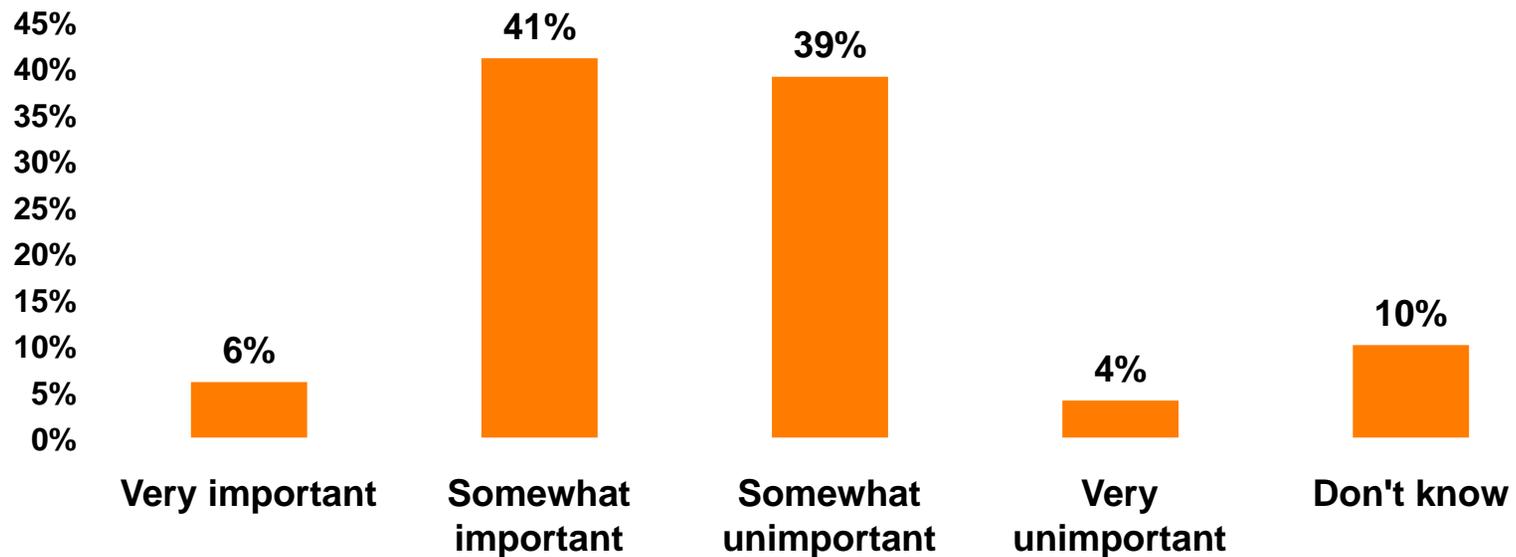
Good time to spend money on travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No	47%	43%	32%	42%	53%	44%	46%	41%	21%
	Yes	9%	11%	15%		5%	11%	14%	9%	7%
	Not sure	14%	25%	19%	42%	26%	25%	25%	19%	
	Do not know	29%	22%	34%	17%	16%	20%	15%	30%	71%
Total	Count	85	207	47	12	19	114	85	109	14

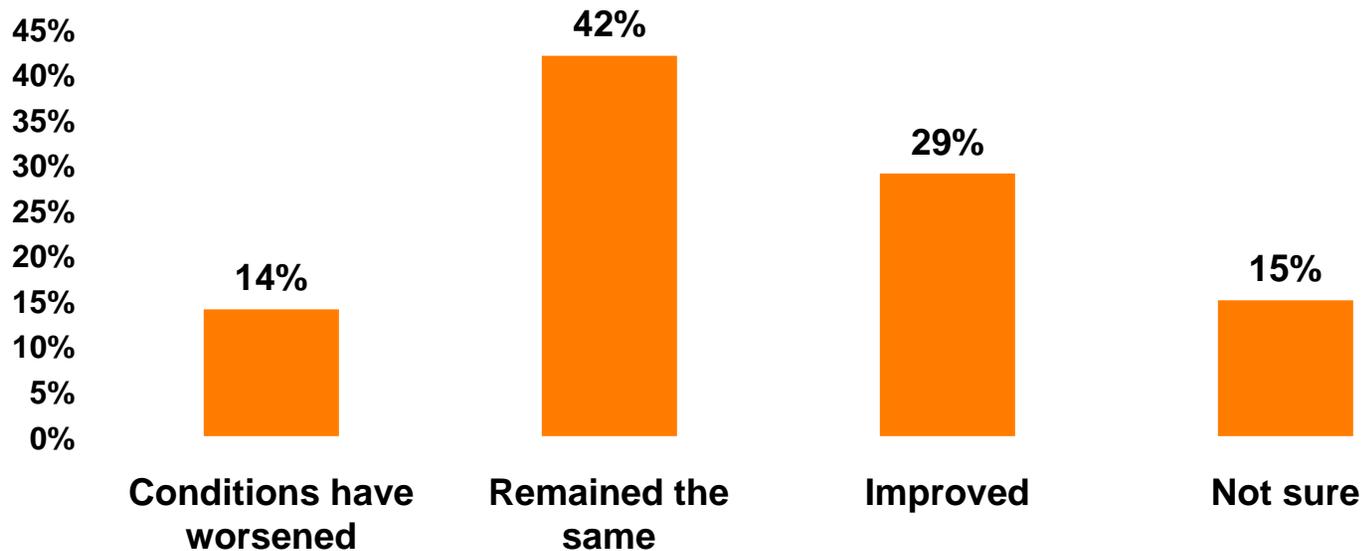
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				Refused
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.23	Very unimportant	4%	4%	6%		4%	5%	3%	14%	
	Somewhat unimportant	34%	42%	36%	33%	11%	33%	46%	36%	
	Somewhat important	44%	42%	36%	33%	58%	47%	34%	14%	
	Very important	7%	4%	9%	8%	5%	4%	9%	7%	
	Don't know	12%	8%	13%	25%	26%	11%	6%	29%	
Total	Count	85	207	47	12	19	114	85	109	14

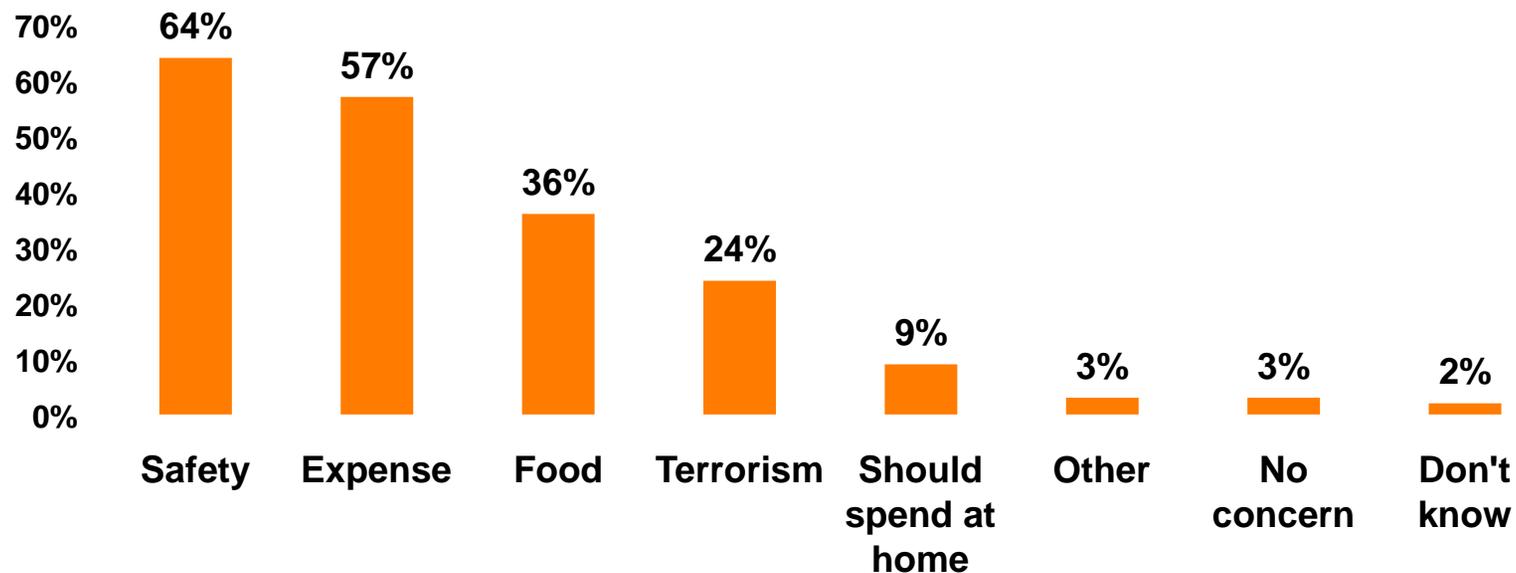
Rating Korean Economy Compared to 12 months ago



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	12%	14%	17%	17%	32%	18%	11%	12%	7%
	Conditions have remained the same	34%	47%	36%	42%	16%	40%	49%	42%	50%
	Conditions have improved	29%	28%	30%	25%	32%	32%	27%	30%	7%
	Do not know	25%	11%	17%	17%	21%	11%	13%	17%	36%
Total	Count	85	206	47	12	19	114	85	108	14

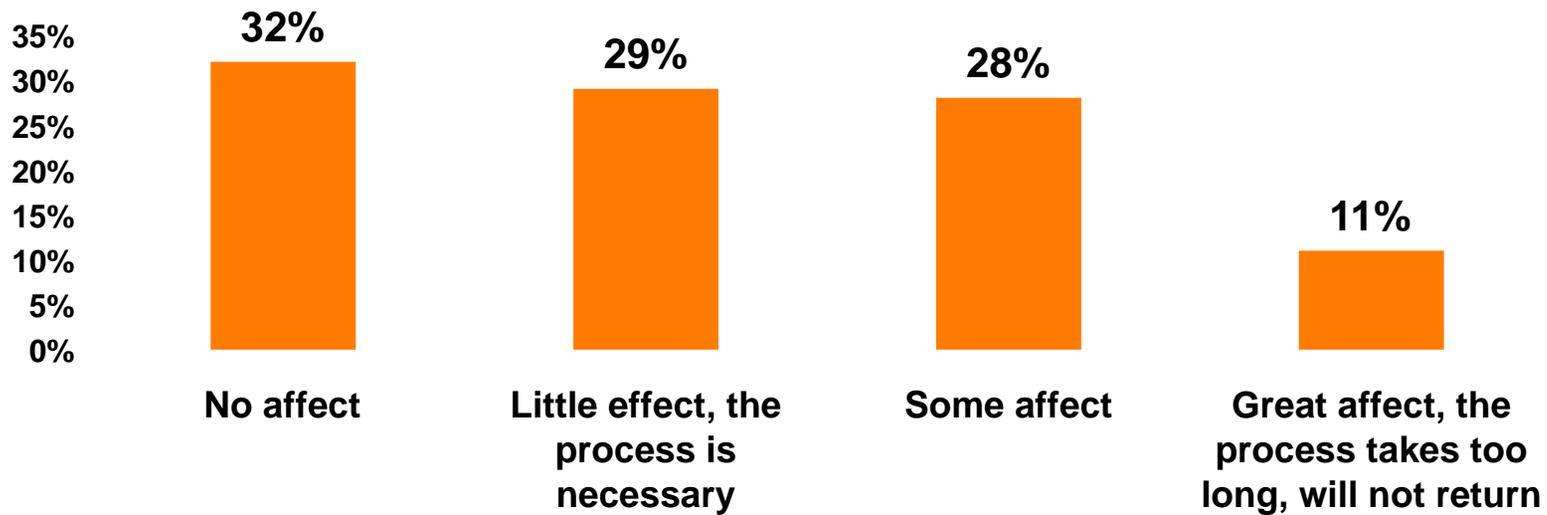
Concerns about travel outside of Korea - Overall



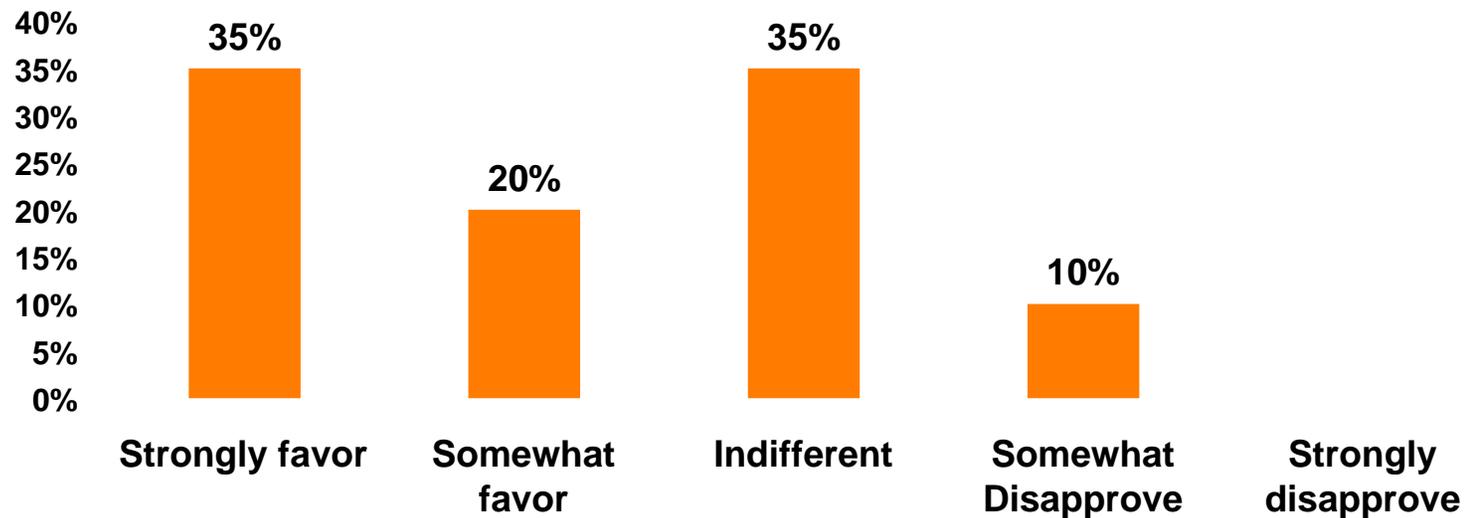
Concerns about travel outside of Korea - By Age & Income

	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	56%	69%	62%	50%	63%	66%	62%	69%	36%
Expense	65%	55%	51%	50%	63%	56%	56%	54%	71%
Food	33%	36%	38%	33%	32%	36%	39%	37%	21%
Terrorism	20%	26%	28%	8%	16%	18%	26%	33%	
Spending money abroad when it should be spent at home	12%	7%	11%	8%	21%	9%	9%	6%	
No concerns	4%	3%	2%			1%	5%	4%	
Other	2%	3%	2%			1%	2%	6%	
Do not know	2%	1%	2%	17%	5%	1%	2%	1%	7%
Total Cases	85	207	47	12	19	114	85	109	14

Security Screening/ Immigration Process at Guam International Airport



Increase Drinking Age to 21



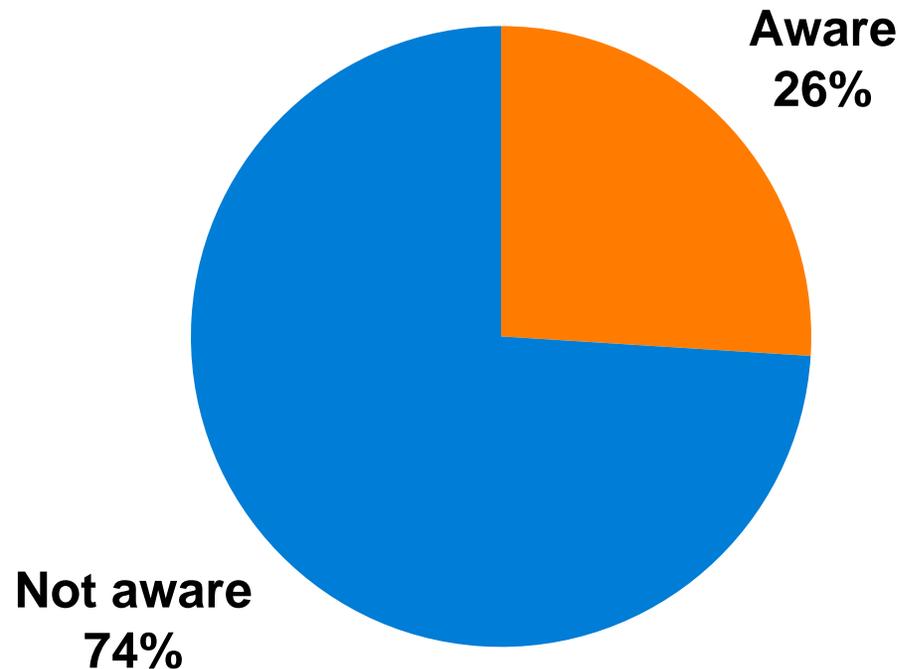
Increase Drinking Age to 21 by Gender & Age

		AGE				GENDER	
		20-29	30-39	40-49	50+	Male	Female
Q.28	Strongly Favor	20%	41%	45%	18%	39%	32%
	Somewhat favor	22%	21%	11%	36%	19%	22%
	Indifferent	45%	30%	34%	36%	32%	37%
	Somewhat disapprove	13%	8%	11%	9%	10%	9%
Total	Count	85	207	47	11	174	176

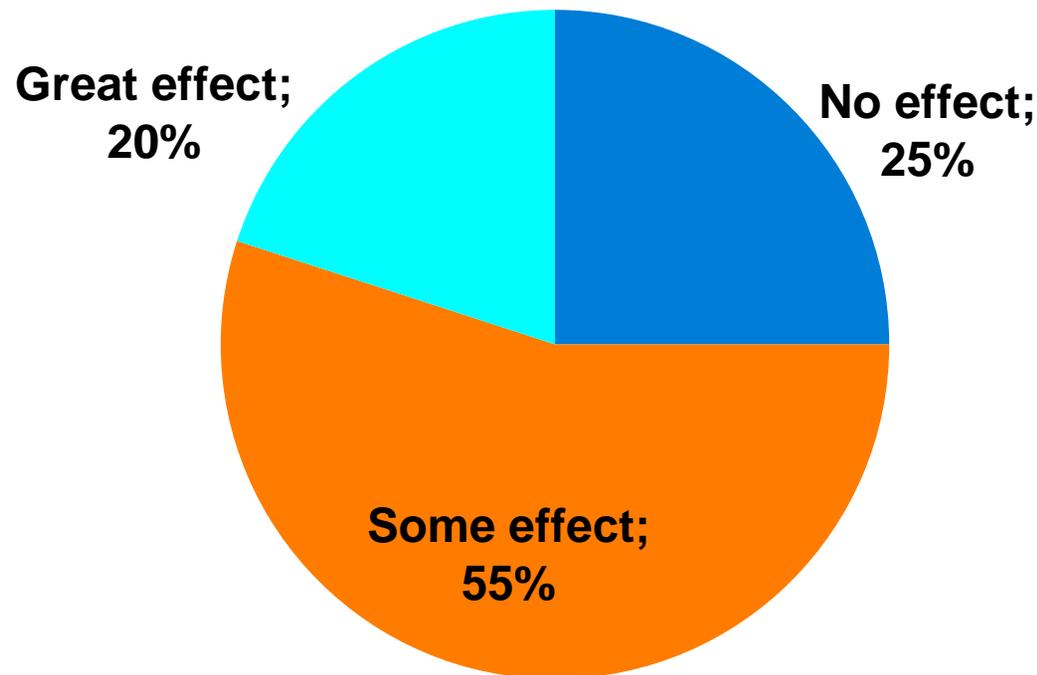
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **2.9** out of possible 7.0
- Agree (Score 6-7) – **7%**
- Neutral (Score 4-5) – **40%**
- 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



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

