



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

JULY 2012



Prepared by: QMark Research

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Background & Methodology

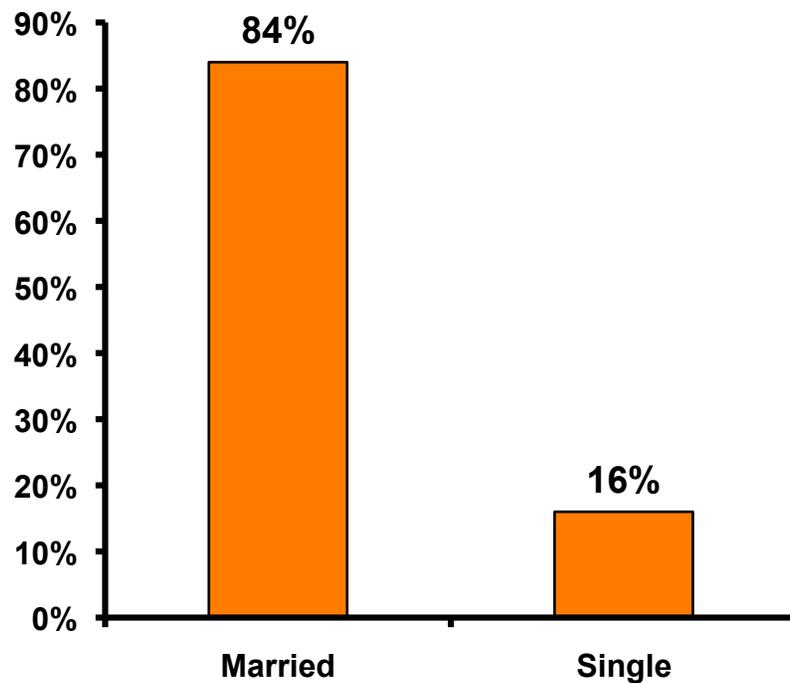
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing Korean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

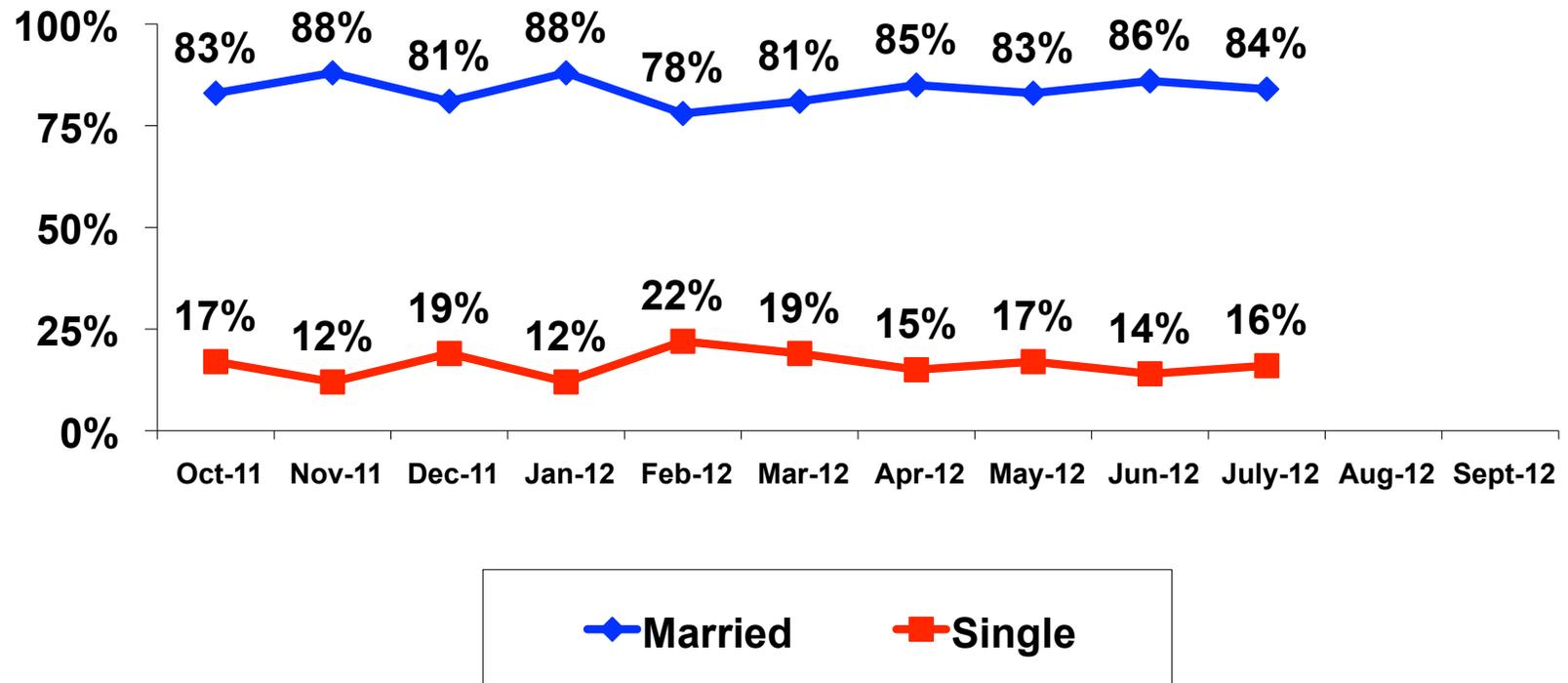
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

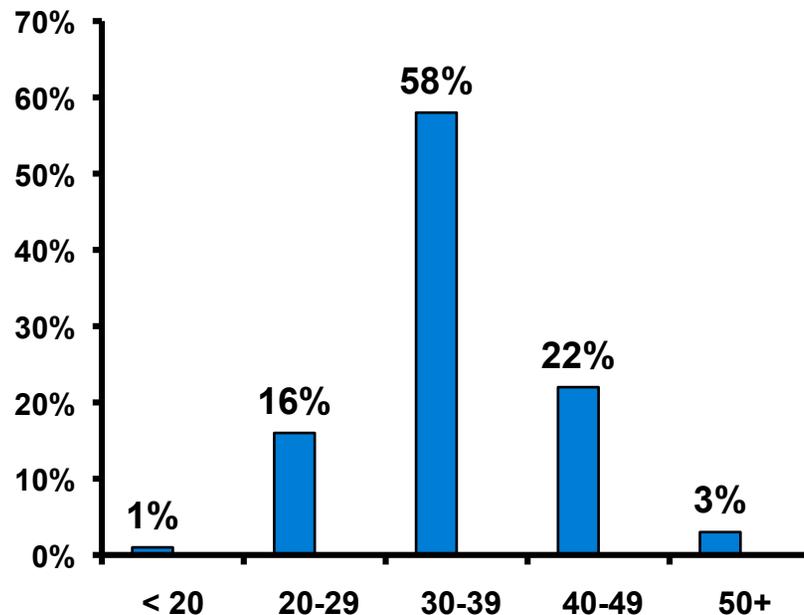


- A majority of visitors are married.

Marital Status

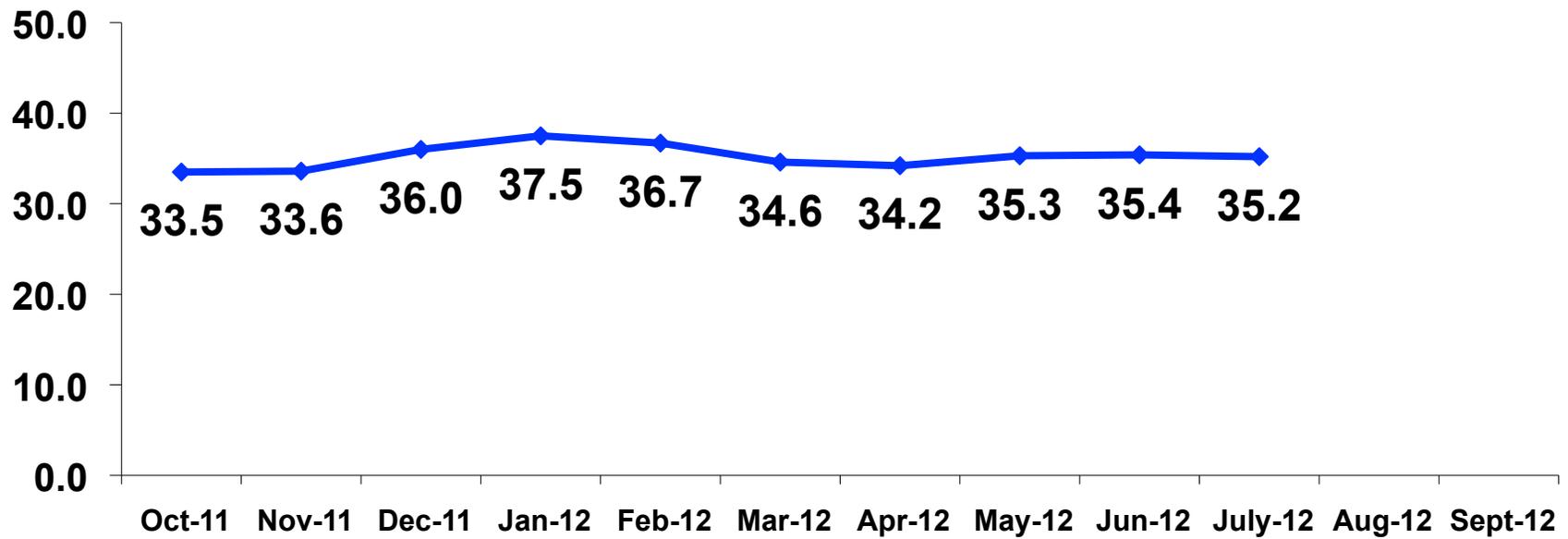


Age - Overall

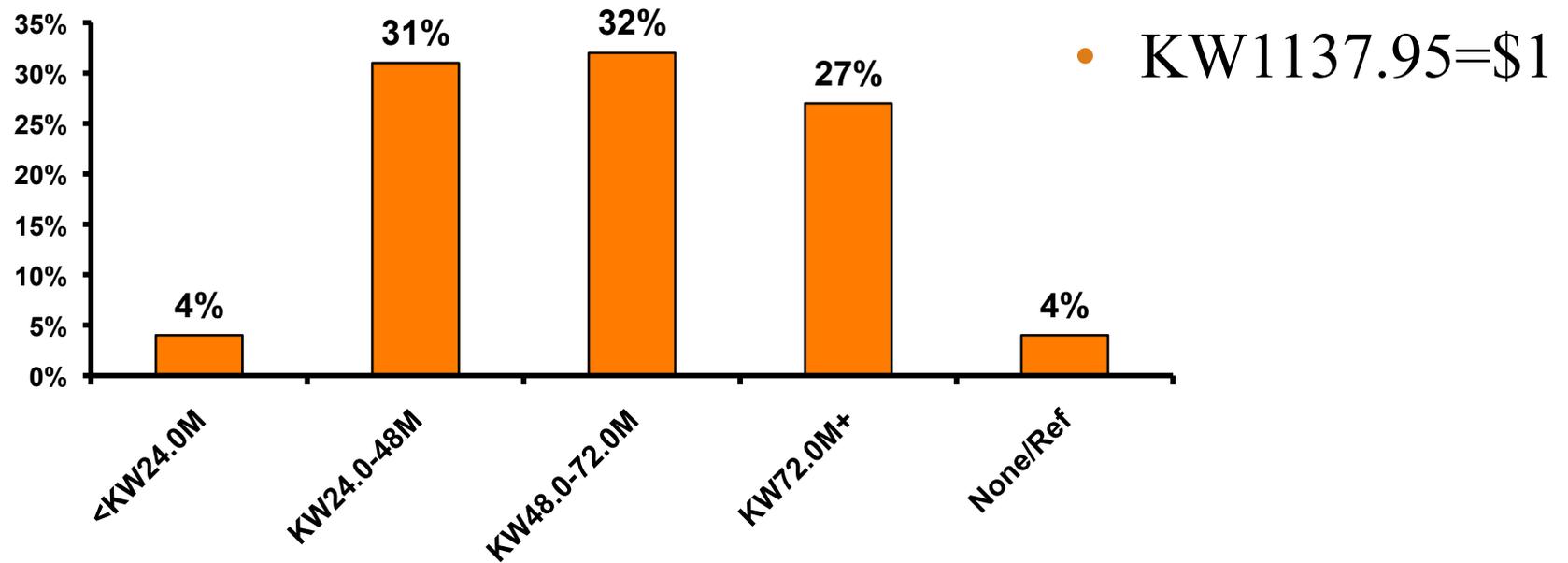


- The average age of the respondents is 35.2 years of age.

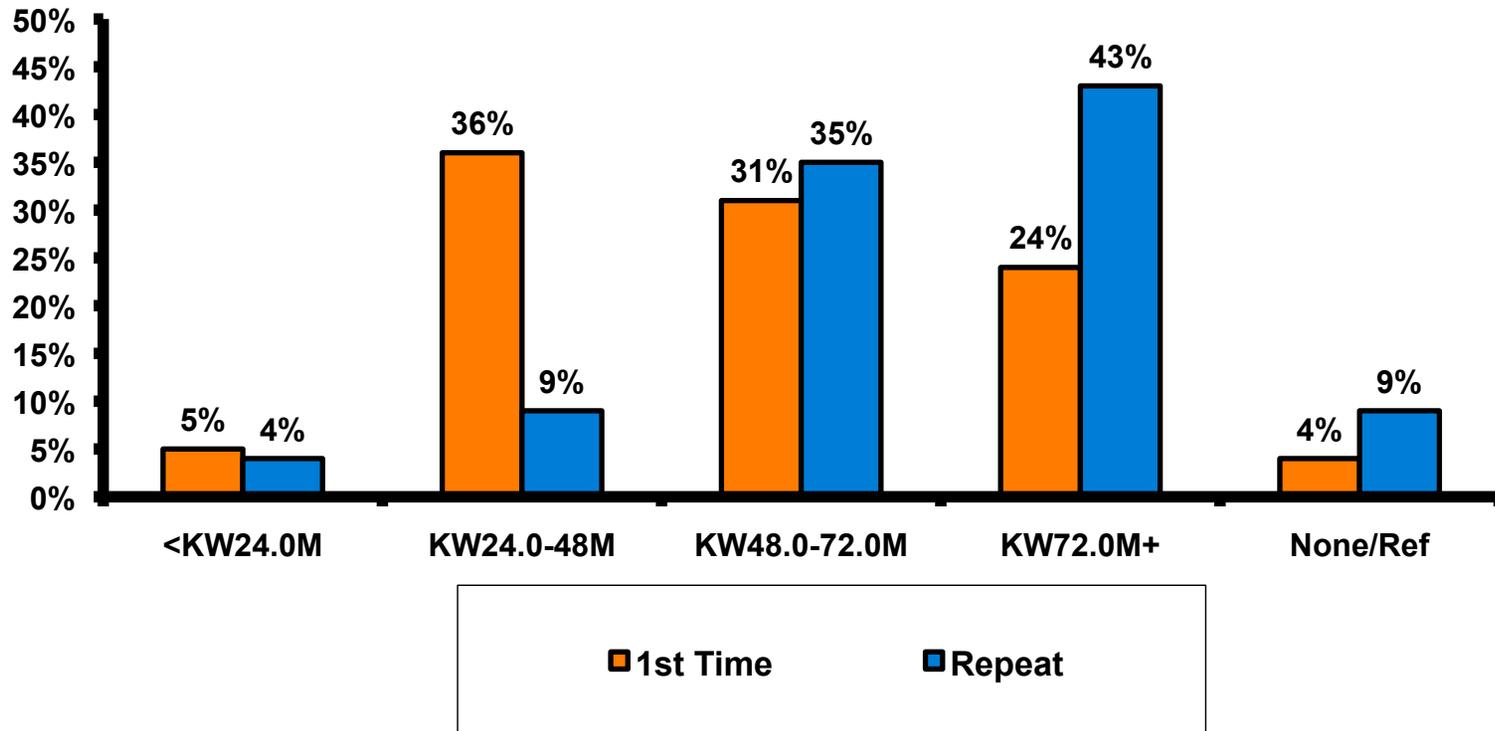
Average Age



Personal Income



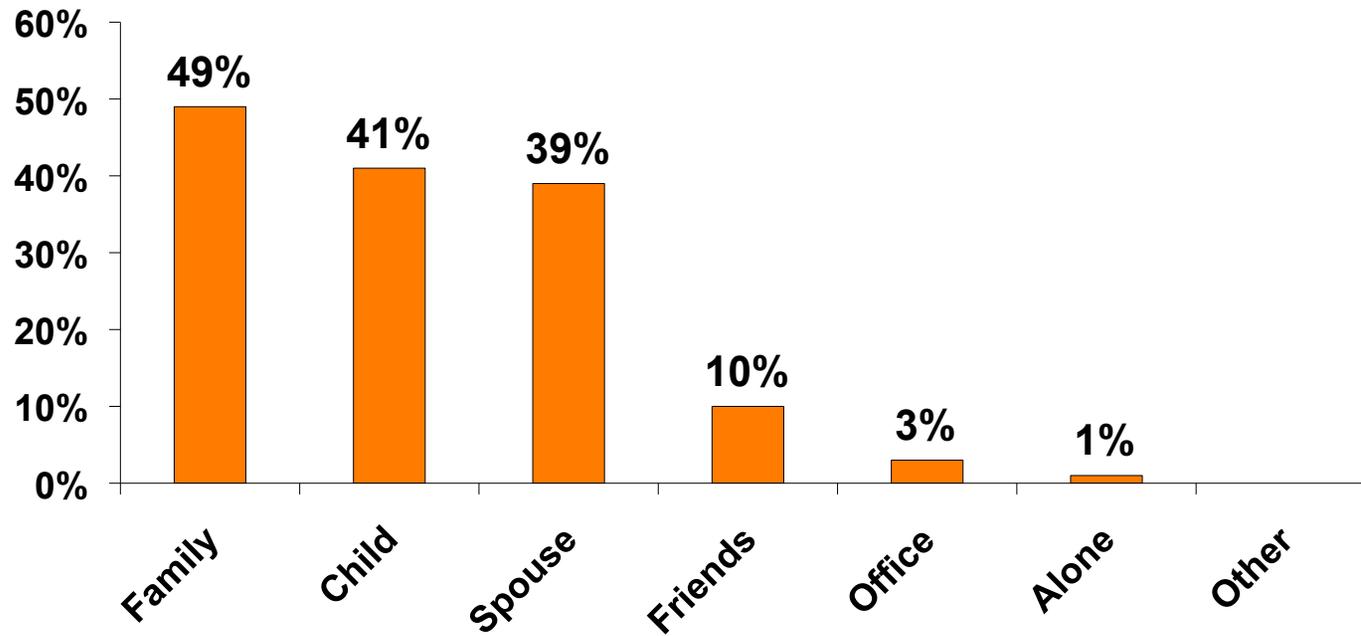
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

	TOTAL	GENDER		AGE					
		Male	Female	<20	20-29	30-39	40-49	50+	
PERSONAL INCOME <KW24.0M	Count	16	7	9	1	6	3	6	
		5%	4%	5%	33%	11%	2%	8%	
KW24.0M-KW48.0M	Count	106	48	58		28	70	6	2
		32%	28%	35%		51%	36%	8%	18%
KW48.0M-KW72.0M	Count	107	58	49		10	74	22	1
		32%	34%	30%		18%	38%	31%	9%
KW72.0M+	Count	90	53	37		4	41	38	7
		27%	31%	23%		7%	21%	53%	64%
Refused	Count	15	4	11	2	7	5		1
		4%	2%	7%	67%	13%	3%		9%
Total	Count	334	170	164	3	55	193	72	1

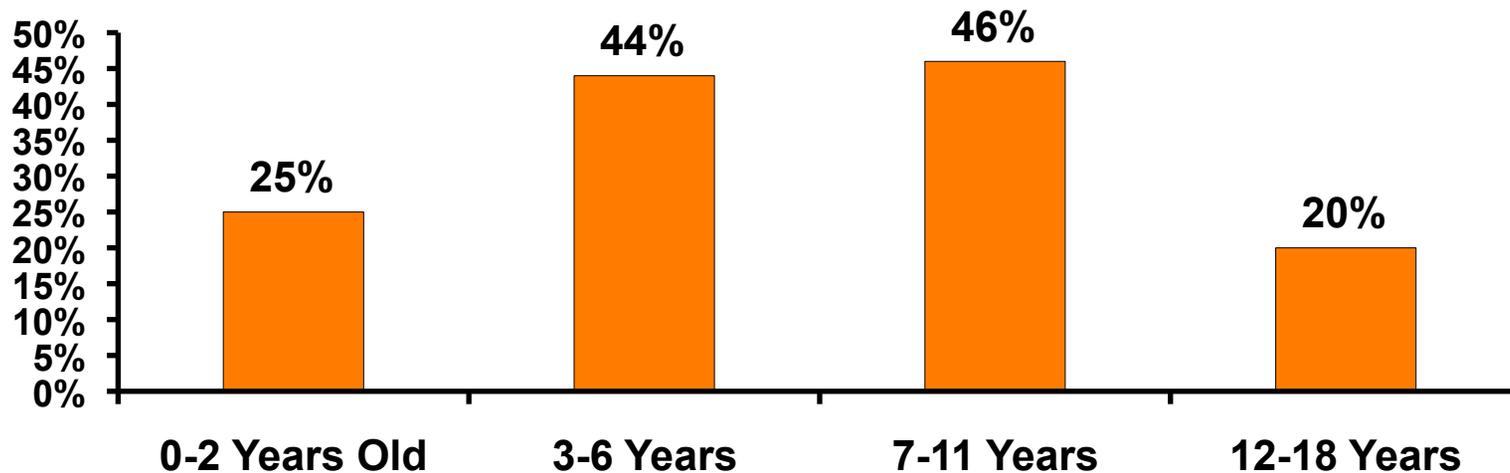
Travel Companions



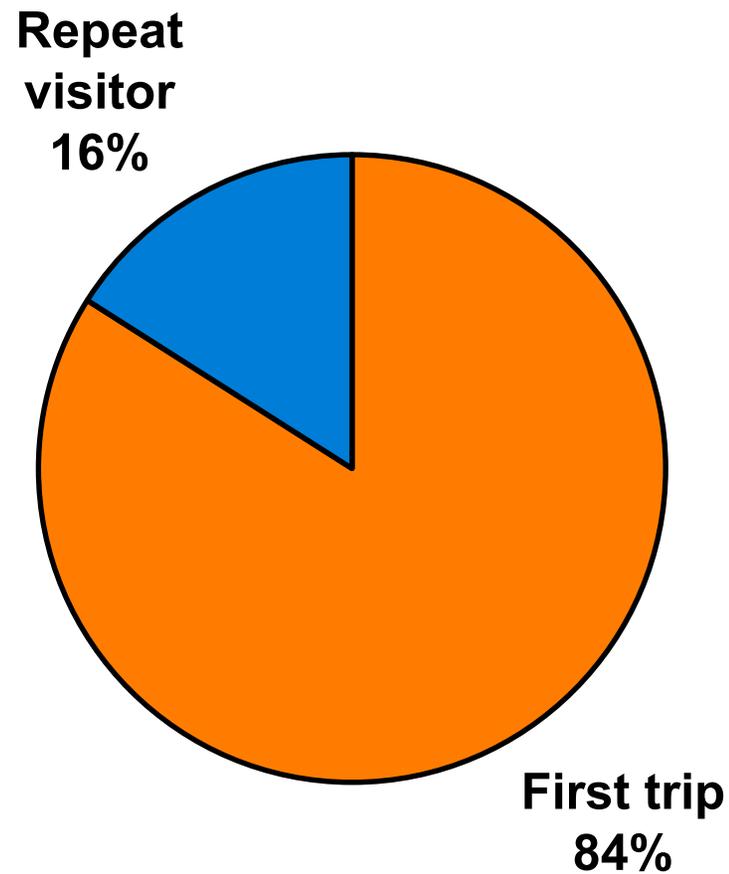
Number of Children Travel Party

N=145 total respondents traveling with children.

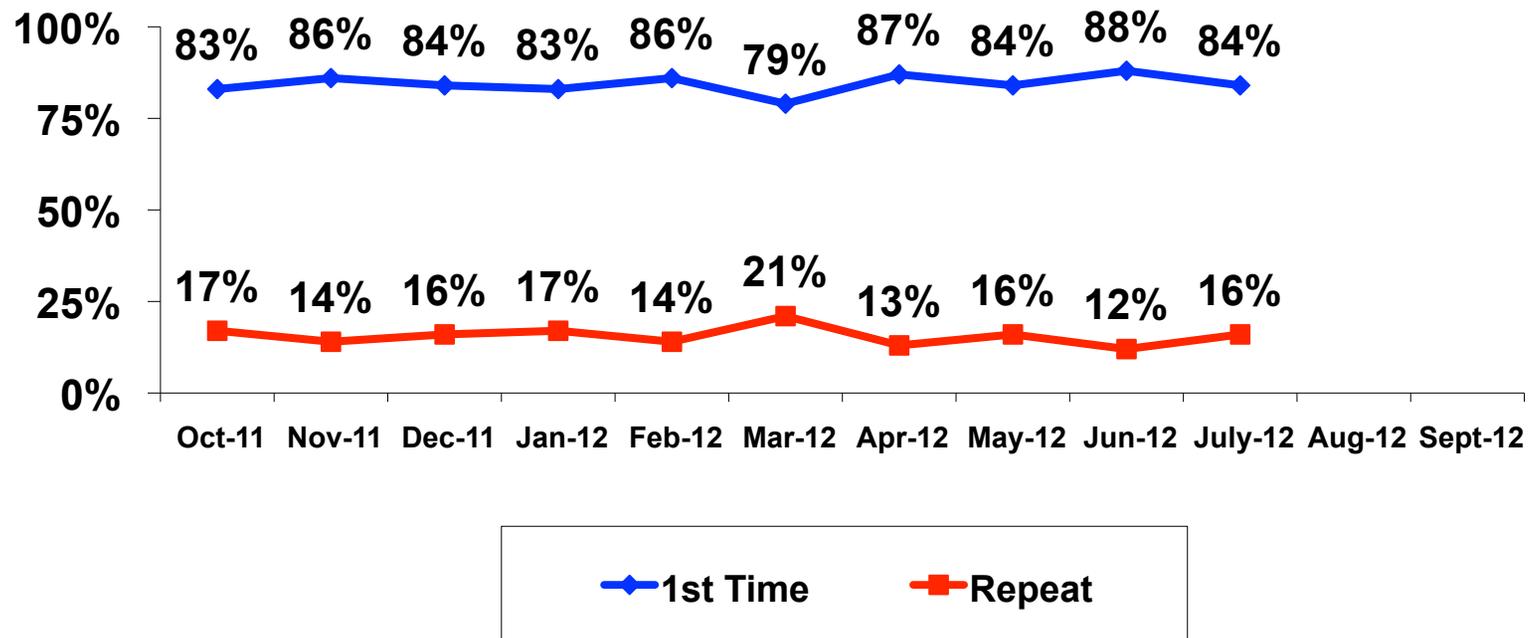
(Of those N=145 respondents, there is a total of 224 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



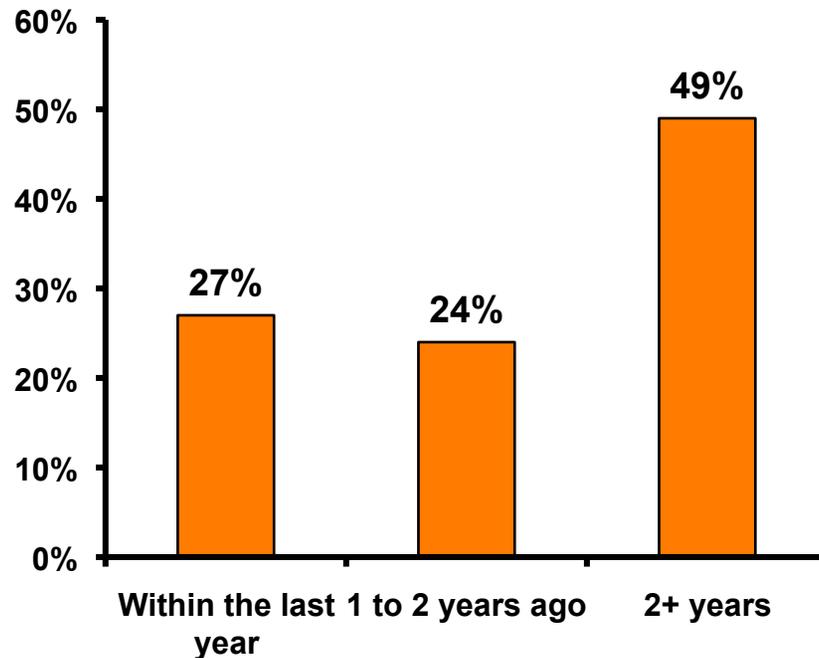
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	175	149	26
			50%	50%	46%
	Female	Count	178	148	30
			50%	50%	54%
Total		Count	353	297	56
AGE	<20	Count	3	1	2
			1%	0%	4%
	20-29	Count	58	53	5
			16%	18%	9%
	30-39	Count	204	182	22
			58%	61%	39%
	40-49	Count	77	55	22
		22%	19%	39%	
	50+	Count	11	6	5
			3%	2%	9%
Total		Count	353	297	56

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

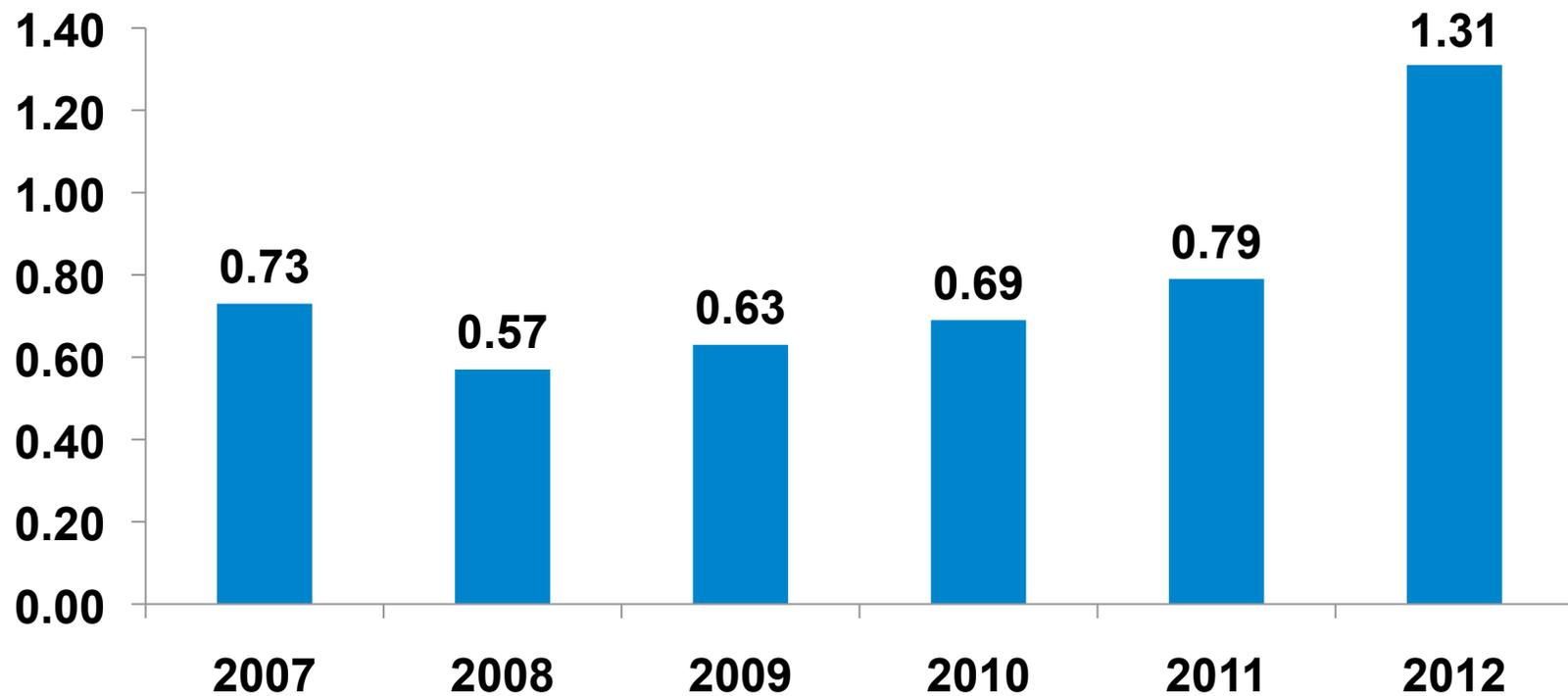
Repeat Visitors Last Trip

n = 55



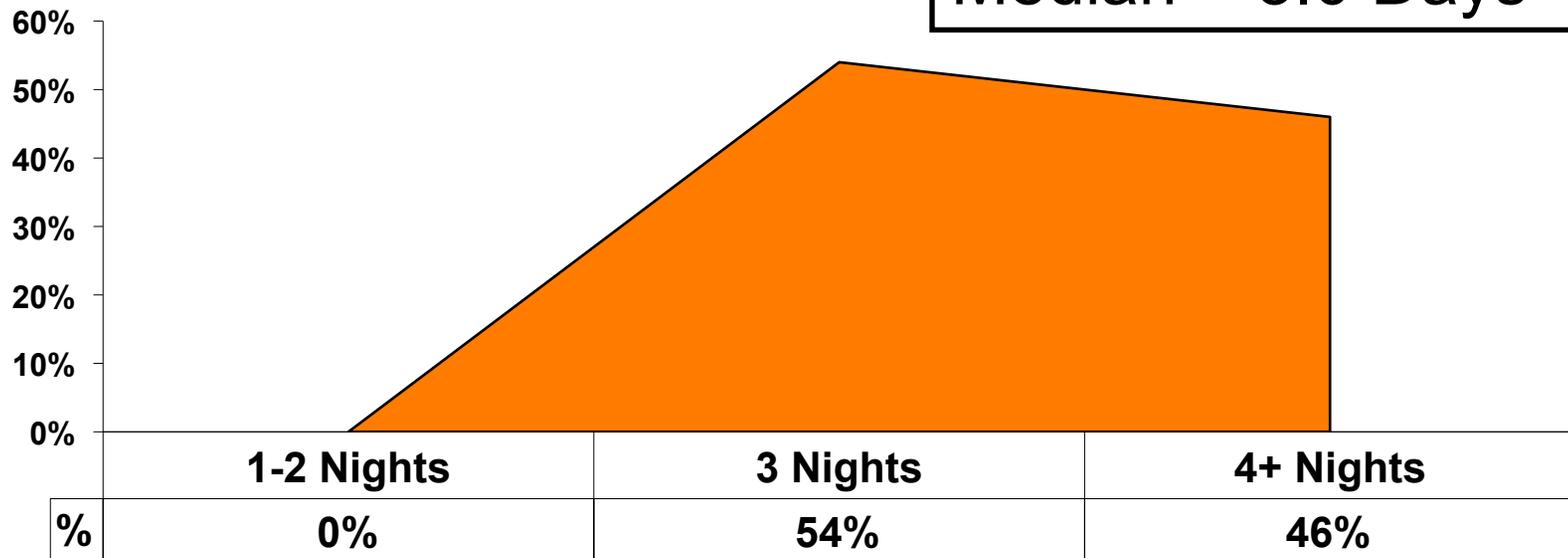
- The average repeat visitor has been to Guam 2.7 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2007-2012) (2 nights or more)

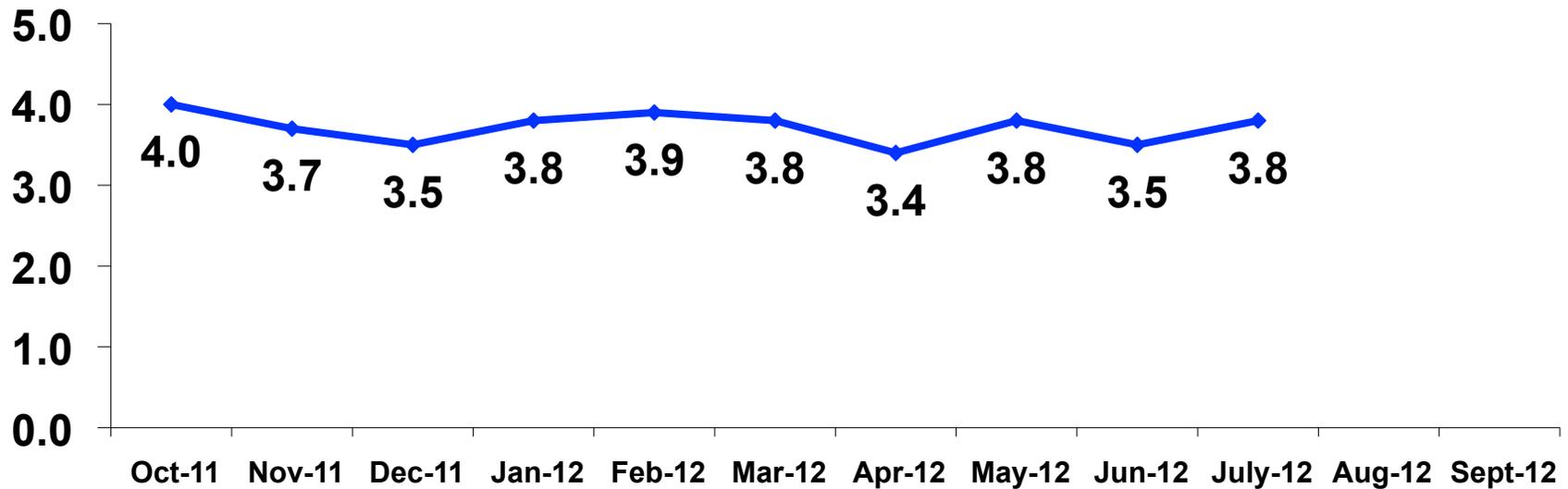


Length of Stay

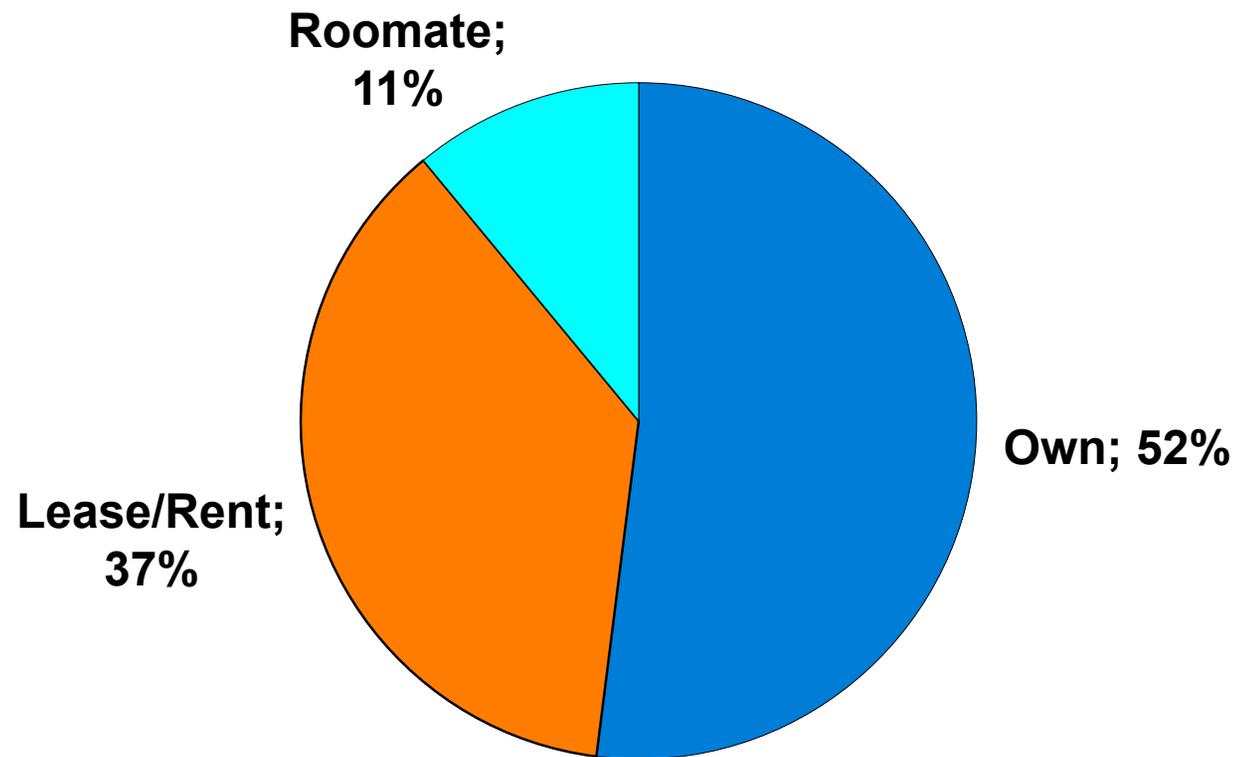
Mean = 3.80 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

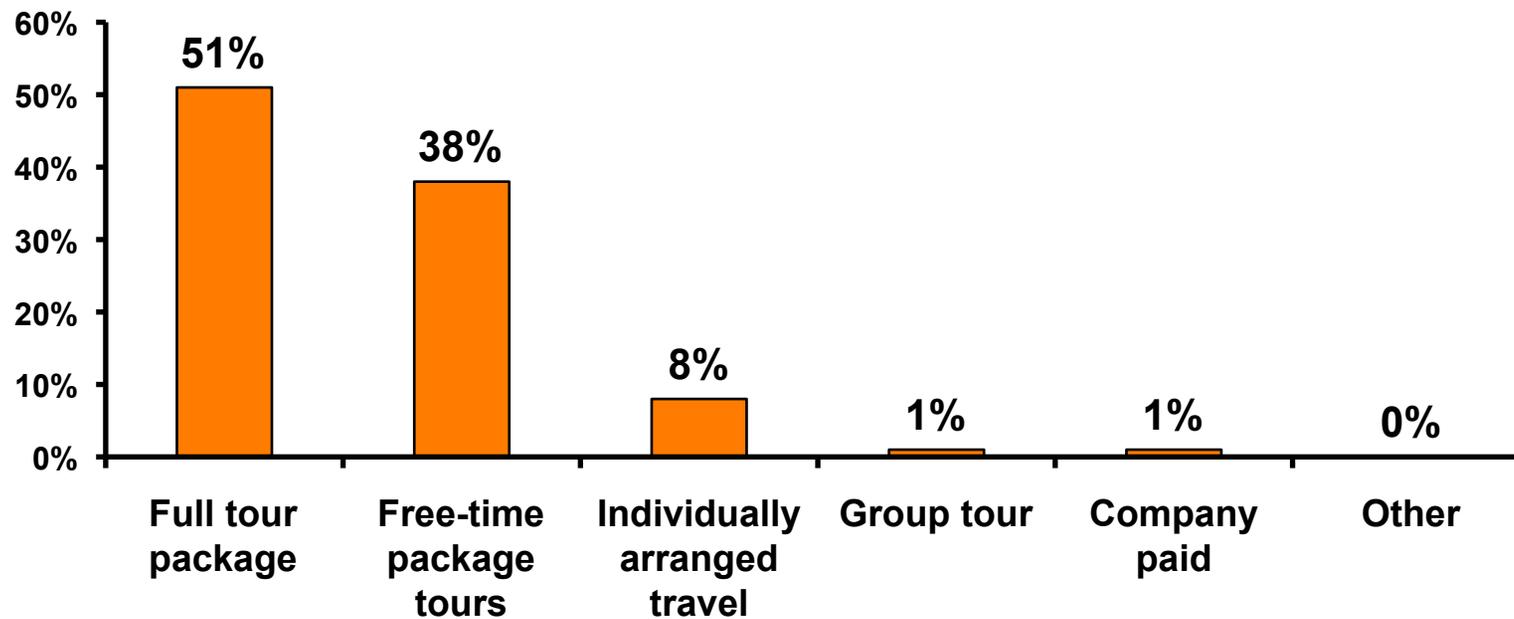


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.29	White Collar-Office	36%	13%	32%	49%	39%	
	Homemaker	16%	13%	12%	17%	10%	40%
	Prof/Specialist/Tech	12%		15%	8%	18%	
	Self-employed	11%	25%	8%	7%	18%	
	Service worker	4%	19%	8%	2%		
	Student	3%	13%		1%	2%	40%
	Manager	3%		4%	2%	6%	
	Professor/Teacher	3%	13%	3%	4%	1%	
	Sales/Clerical	2%		2%	3%	3%	
	Govt - Office/non-mgr	2%		6%	1%		
	Other	1%		4%		1%	
	Unemployed	1%	6%				20%
	Govt-Mgr	1%		3%	1%		
	Skilled worker	1%			4%		
	Govt-Exec	1%		2%	1%		
	Free-lancer	1%		1%	1%	1%	
	Farmer	0%				1%	
Total	Count	348	16	106	107	90	15

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

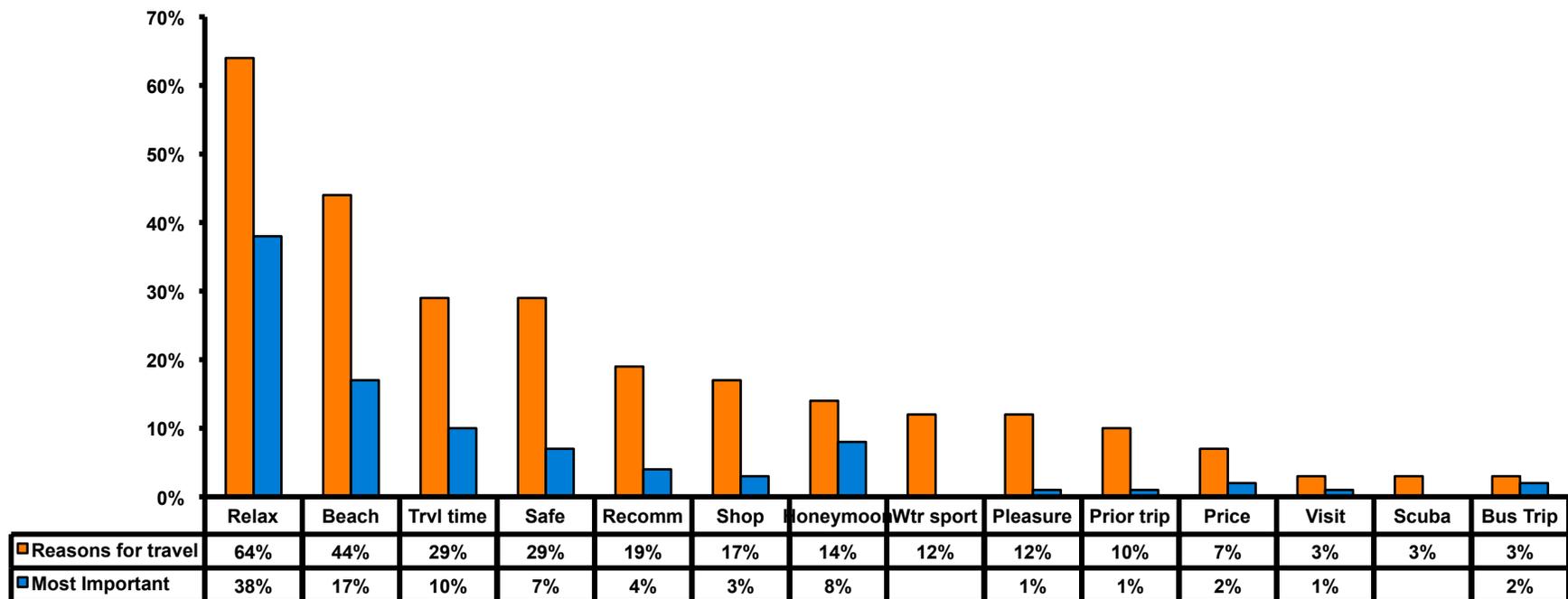


Accommodation by Income

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	57%	40%	42%	64%	70%	27%
Hyatt Regency Guam	10%	13%	15%	11%	3%	20%
Hilton Guam Resort & Spa	7%	7%	9%	6%	6%	13%
The Westin Resort Guam	5%	7%	8%	5%	3%	7%
Sheraton Laguna Resort	5%		6%	2%	7%	13%
Hotel Nikko Guam	4%	7%	5%	5%	3%	
Holiday Resort Guam	4%	20%	3%	4%		20%
Outrigger Guam Resort	2%		5%	3%		
Guam Aurora Resort Villa & Spa	1%		3%	1%	1%	
Onward Beach Resort	1%		1%	1%	1%	
Relatives, Friends, Home Stay	1%	7%	1%		1%	
Leo Palace Resort	1%		1%		1%	
Guam Reef Hotel	1%				2%	
Ramada Suites Guam	1%		2%			
Other	0%				1%	
Fiesta Resort Guam	0%		1%			
Total Count	350	15	106	107	89	15

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
- Guam's natural beauty/beaches and
- Short travel distance

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	64%		57%	64%	74%	55%	65%	63%
Beautiful seas, beaches, tropical climate	44%	67%	43%	44%	48%	27%	42%	47%
Short travel time	29%		24%	34%	25%	9%	30%	28%
It is a safe place to spend a vacation	29%		31%	28%	30%	27%	26%	31%
Recommendation of friend, relative, travel agency	19%	33%	33%	17%	13%	18%	15%	22%
Shopping	17%		16%	21%	13%		19%	15%
Honeymoon	14%		29%	16%	3%		17%	12%
Water sports	12%		14%	12%	12%		10%	13%
Pleasure	12%	33%	19%	8%	13%	18%	11%	12%
A previous visit	10%	67%	5%	6%	21%	18%	9%	11%
Price of the tour package	7%		3%	8%	10%		10%	5%
To visit friends or relatives	3%	33%		1%	6%	9%	3%	3%
Other	3%		2%	3%	3%		2%	4%
SCUBA diving	3%	33%	7%	1%	1%		2%	3%
Company or Business trip	2%		2%	0%	5%	18%	3%	1%
My company sponsored me	2%		2%	1%	4%		1%	3%
Organized Sporting Activity	2%		5%	1%	3%		1%	3%
To golf	1%			1%	1%		2%	1%
Special promotion	1%		2%	1%			1%	1%
Special Interest Tour	1%	33%		0%			1%	1%
Convention, Conference, Trade show	0%					9%	1%	
Promotional materials from GVB	0%			0%			1%	
Career certification or testing	0%			0%			1%	
To get married or Attend wedding	0%			0%			1%	
Total Cases	353	3	58	204	77	11	175	178

Motivation by Income

	TOTAL	PERSONAL INCOME					Refused
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+		
Q.5 Just to relax	64%	44%	61%	69%	73%	27%	
Beautiful seas, beaches, tropical climate	44%	50%	39%	47%	51%	47%	
Short travel time	29%	6%	23%	36%	32%	33%	
It is a safe place to spend a vacation	29%	25%	25%	33%	32%	20%	
Recommendation of friend, relative, travel agency	19%	25%	23%	17%	16%	20%	
Shopping	17%	6%	18%	20%	14%	13%	
Honeymoon	14%	31%	25%	11%	3%	13%	
Water sports	12%	6%	8%	19%	9%	13%	
Pleasure	12%		8%	13%	14%	27%	
A previous visit	10%	13%	2%	12%	18%	20%	
Price of the tour package	7%		8%	7%	9%	7%	
To visit friends or relatives	3%	13%	2%	1%	4%	7%	
Other	3%		4%	2%	4%		
SCUBA diving	3%	6%	1%	2%	4%	7%	
Company or Business trip	2%	6%	4%	1%	1%		
My company sponsored me	2%	19%	1%	2%		7%	
Organized Sporting Activity	2%	6%	2%	1%	1%	7%	
To golf	1%			3%	1%		
Special promotion	1%		2%				
Special Interest Tour	1%		1%			7%	
Convention, Conference, Trade show	0%					7%	
Promotional materials from GVB	0%				1%		
Career certification or testing	0%		1%				
To get married or Attend wedding	0%		1%				
Total Cases	353	16	106	107	90	15	

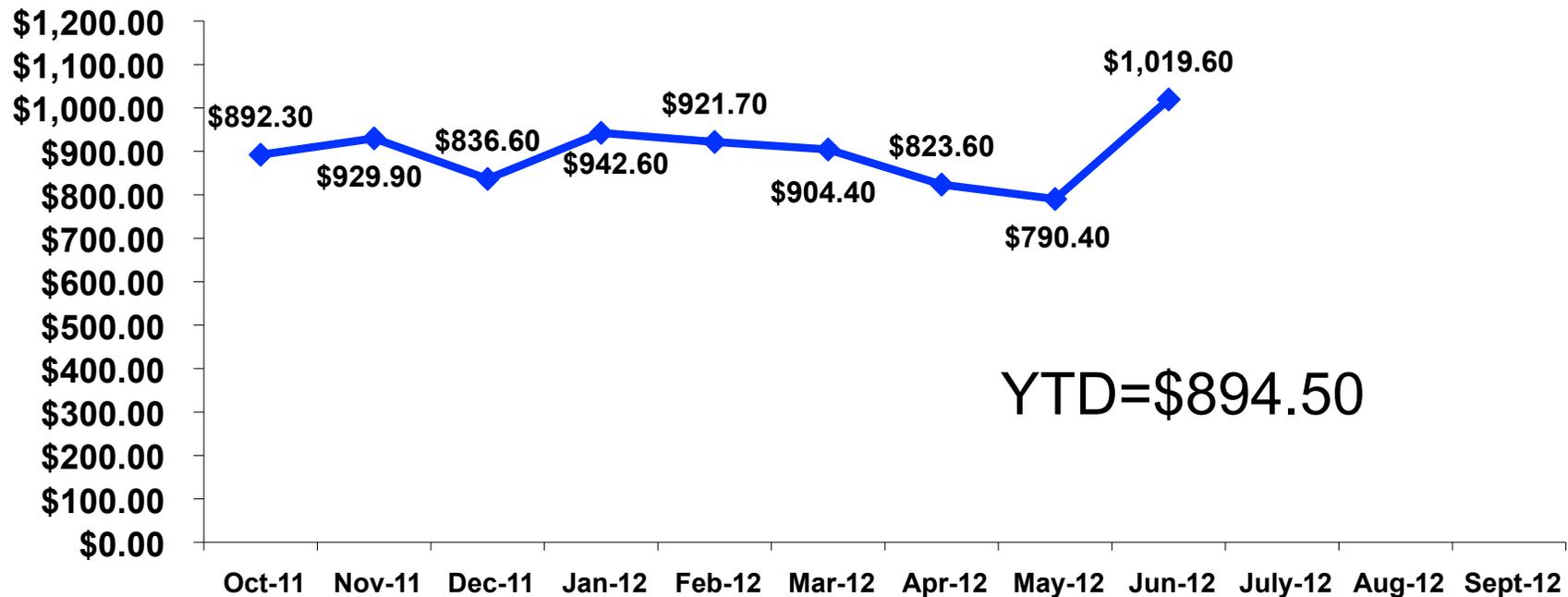
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1137.95/US\$1

- \$2,627.10 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,666 = maximum (highest amount recorded for the entire sample)
- \$1,019.60 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

KW1137.95=\$1

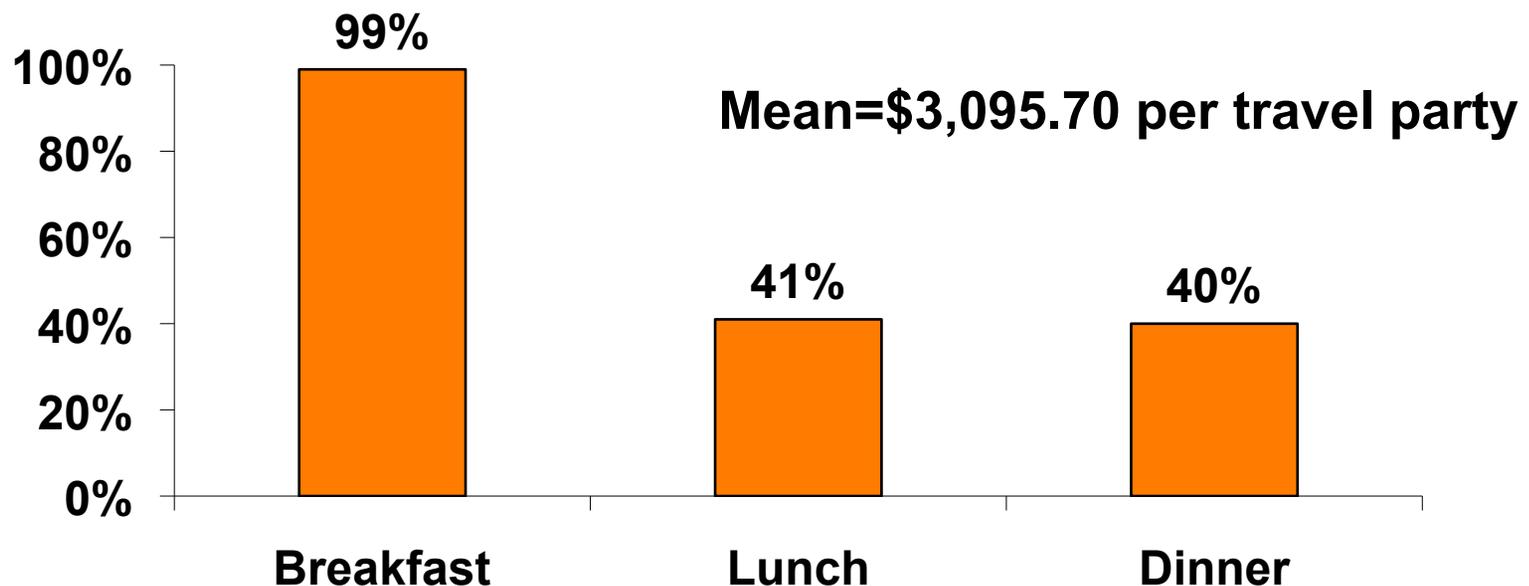
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,541.90
Air & Accommodation w/ daily meal package	\$3,095.70
Air only	\$1,274.20
Accommodation only	\$732.90
Accommodation w/ daily meal only	\$958.80
Food & Beverages in Hotel	\$236.60
Ground transportation- Korea	\$65.40
Ground transportation- Guam	\$266.60
Optional tours/ activities	\$532.70
Other expenses	\$342.40
Total Prepaid	\$2,627.10

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

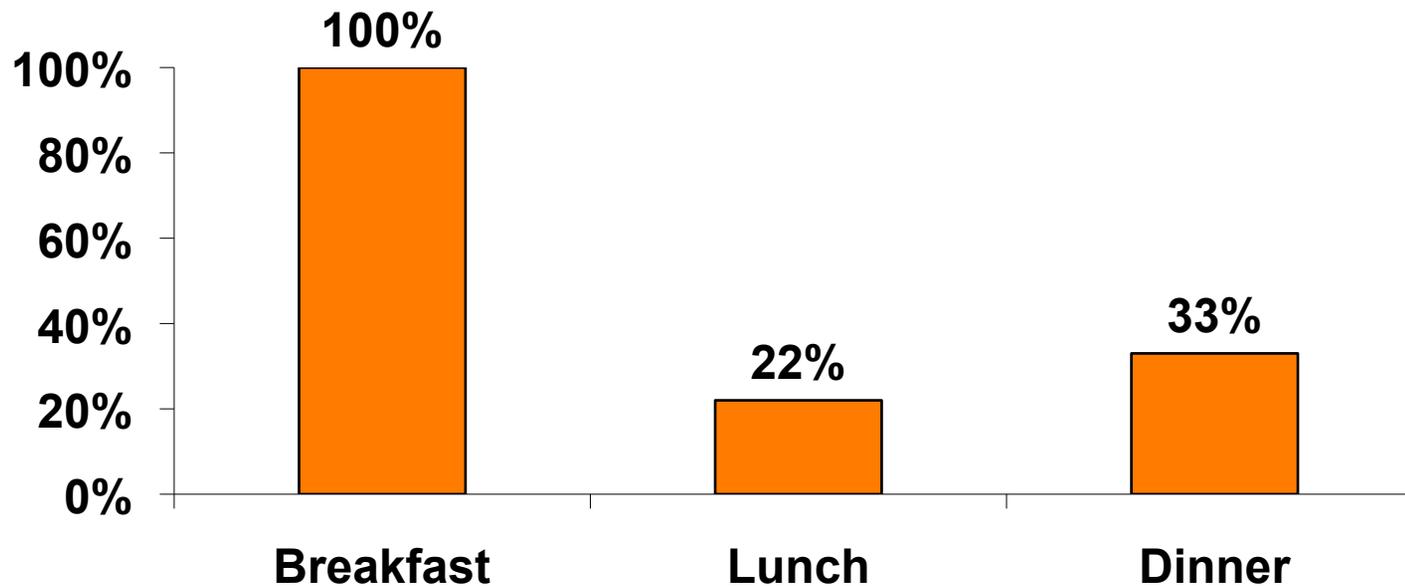
n=227



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

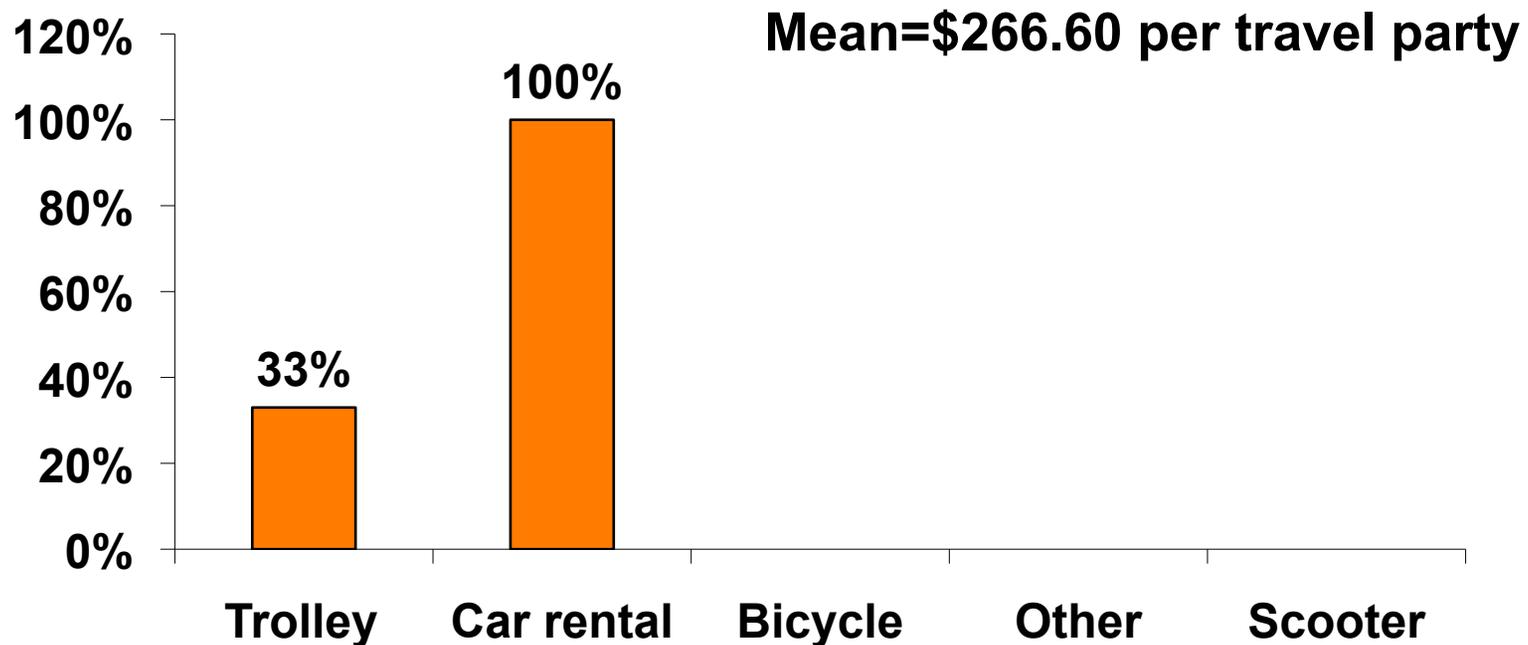
n= 9



Mean= \$1,097.50 per travel party

Prepaid Ground Transportation

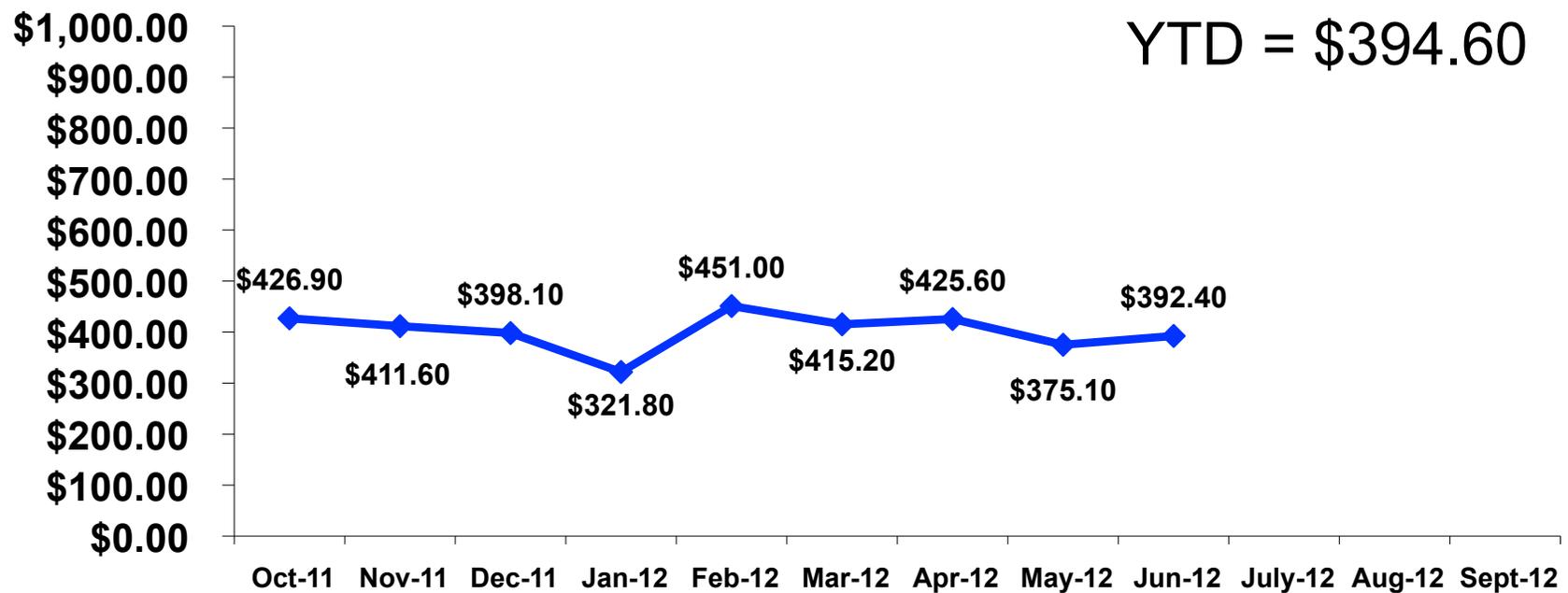
N=3



On-Island Expenditures

- \$901.50 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,000 = Maximum (highest amount recorded for the entire sample)
- \$392.40 = overall mean average per person on-island expenditure

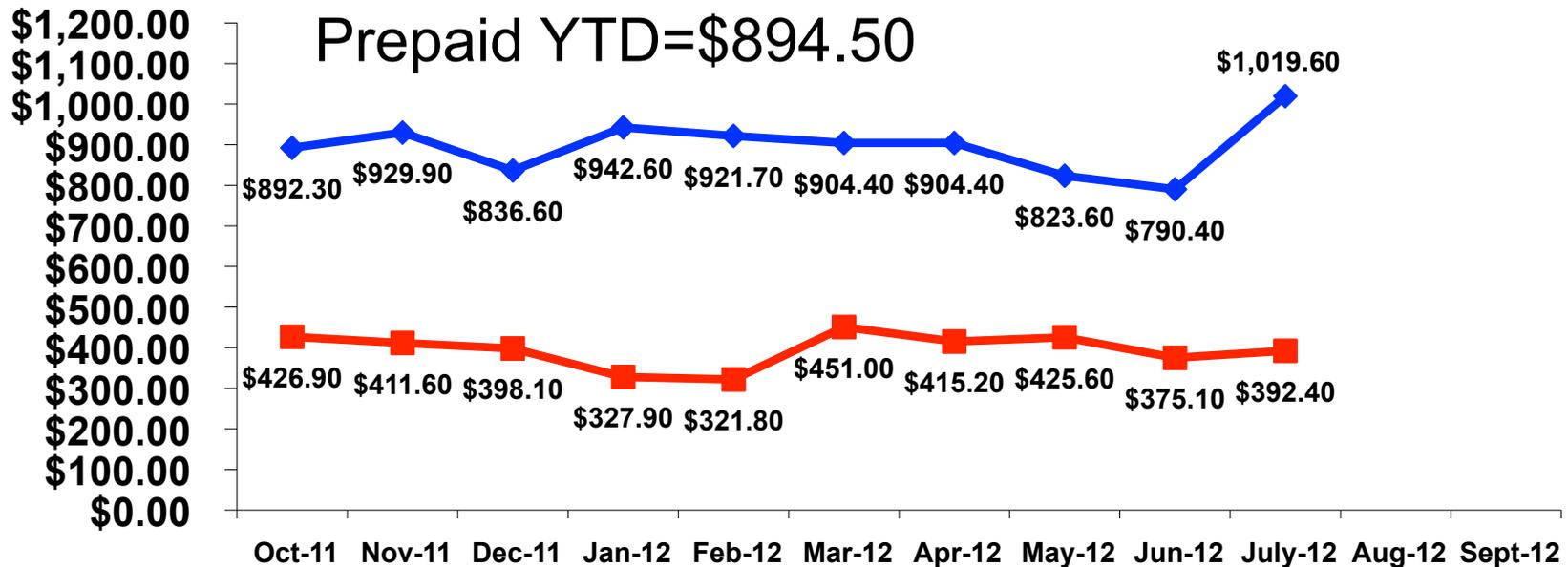
On-Island Expenditures Per Person



Prepaid/On-Island Expenditures Per Person

On-Isle YTD = \$394.60

Prepaid YTD = \$894.50



Total On-Island Expenditure by Gender & Age

	TOTAL	GENDER		GENDER									
		Male	Female	Male					Female				
				AGE					AGE				
				<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A Mean	\$901.52	\$922.33	\$881.06	\$185.00	\$985.58	\$921.31	\$744.63	\$1,879.44	\$700.00	\$1,059.46	\$794.06	\$887.07	\$1,178.57
Median	\$650	\$700	\$600	\$185	\$800	\$800	\$550	\$750	\$700	\$813	\$600	\$500	\$1,179

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$37.03	\$29.70	\$44.19	\$5.00	\$45.72	\$30.15	\$40.73	\$106.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF	Mean	\$25.33	\$28.82	\$21.90	\$6.67	\$25.41	\$25.77	\$26.84	\$10.00
REST/CONV	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE	Mean	\$51.33	\$49.81	\$52.82	\$0.00	\$48.57	\$52.35	\$57.16	\$17.00
HOTEL/ REST	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL	Mean	\$115.78	\$138.42	\$93.65	\$0.00	\$121.98	\$106.67	\$122.47	\$236.10
TOUR	Median	\$0	\$0	\$0	\$0	\$75	\$0	\$0	\$0
GIFT/	Mean	\$217.00	\$252.09	\$182.31	\$433.33	\$293.34	\$214.53	\$146.82	\$300.00
SOUV-SELF	Median	\$0	\$12	\$0	\$0	\$10	\$50	\$0	\$0
GIFT/SOUV-	Mean	\$124.73	\$129.86	\$119.66	\$140.00	\$143.61	\$121.75	\$130.23	\$29.00
F&F AT HOME	Median	\$0	\$0	\$0	\$20	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$46.73	\$56.79	\$36.78	\$83.33	\$31.95	\$30.78	\$38.78	\$508.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$316.80	\$289.64	\$343.51	\$193.33	\$341.02	\$282.38	\$228.62	\$1,597.00
	Median	\$20	\$0	\$30	\$130	\$20	\$2	\$40	\$455
TOTAL ON	Mean	\$901.52	\$922.33	\$881.06	\$528.33	\$1,044.18	\$859.56	\$798.27	\$1,752.01
ISLAND	Median	\$650	\$700	\$600	\$400	\$813	\$700	\$500	\$750

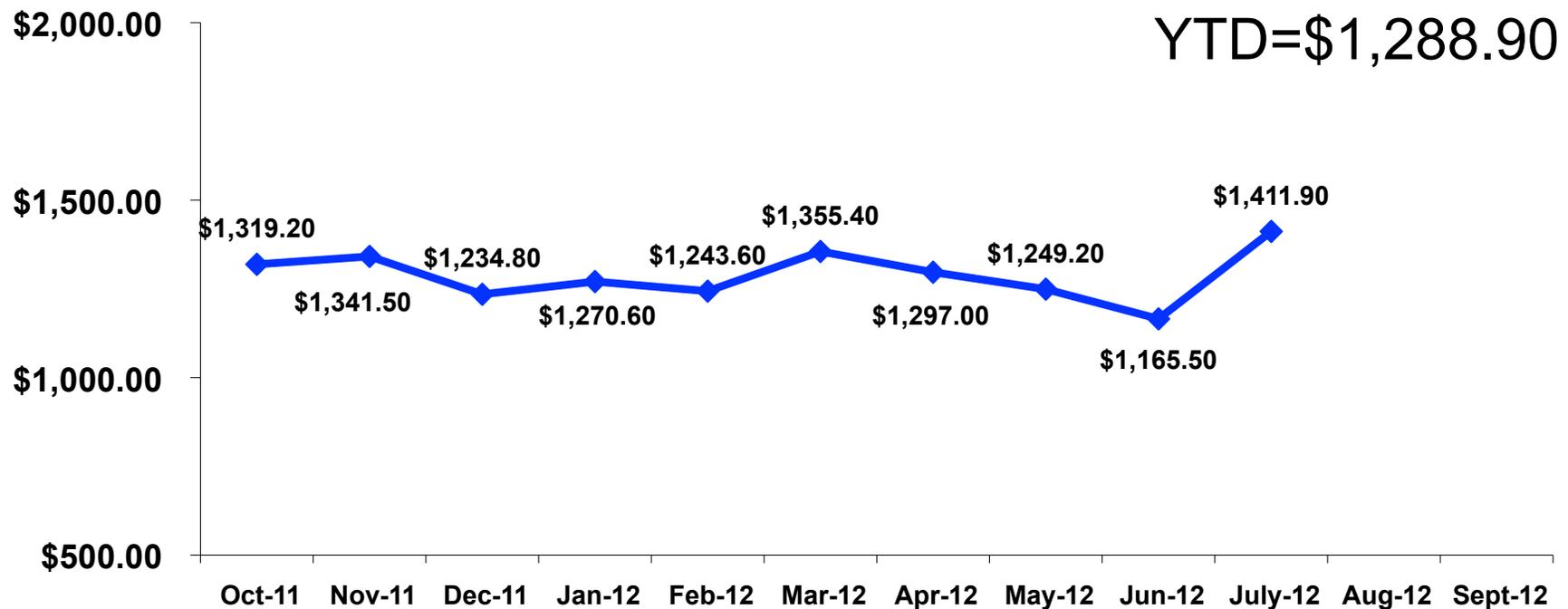
On-Island Expenditures First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$33.13	\$57.50
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$25.59	\$23.96
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$50.11	\$57.77
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$126.93	\$56.88
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$208.56	\$261.61
	Median	\$6	\$0
GIFT/SOUV- F&F AT HOME	Mean	\$136.31	\$63.54
	Median	\$0	\$0
LOCAL TRANS	Mean	\$27.84	\$146.59
	Median	\$0	\$0
OTHER EXP	Mean	\$268.31	\$572.27
	Median	\$20	\$45
TOTAL ON ISLAND	Mean	\$871.83	\$1,058.96
	Median	\$656	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,411.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,406 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

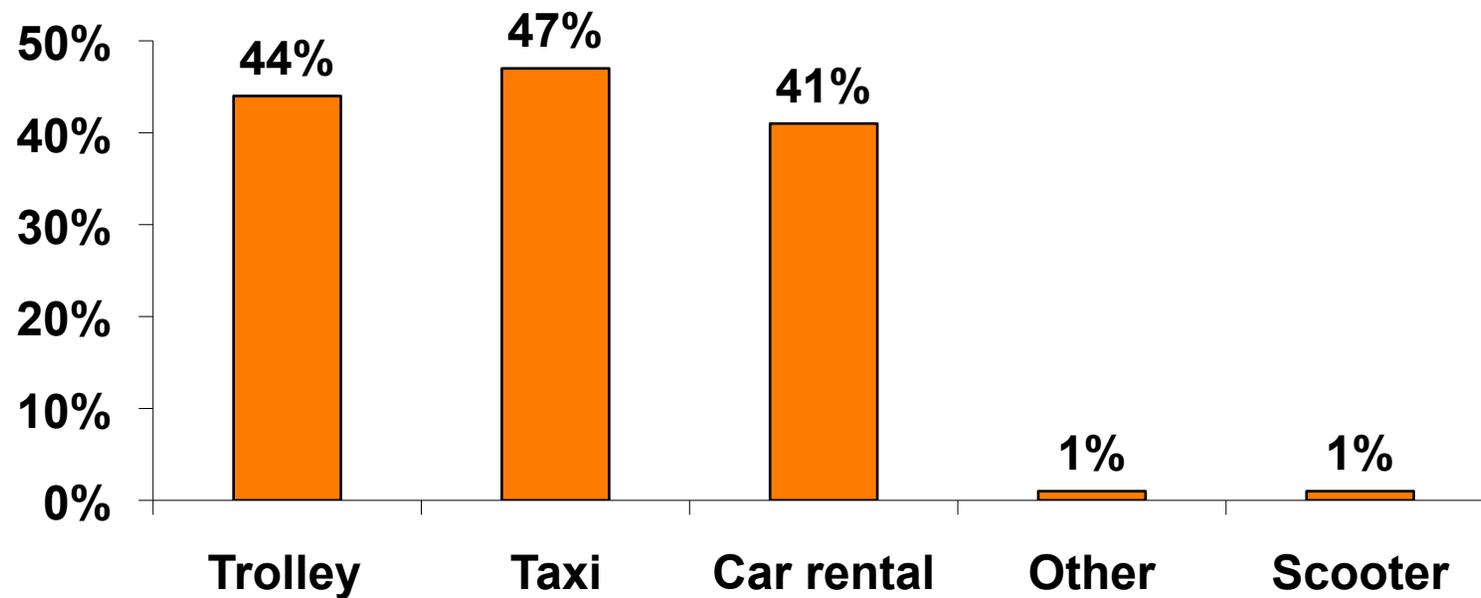


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$37.00
Food & beverage in fast food restaurant/ convenience store	\$25.30
Food & beverage at restaurants or drinking establishments outside a hotel	\$51.30
Optional tours and activities	\$115.80
Gifts/ souvenirs for yourself/companions	\$217.00
Gifts/ souvenirs for friends/family at home	\$124.70
Local transportation	\$46.70
Other expenses not covered	\$316.80
Average Total	\$901.50

Local Transportation

n=122



Mean=\$46.70 per travel party

Guam Airport Expenditures

- \$62.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

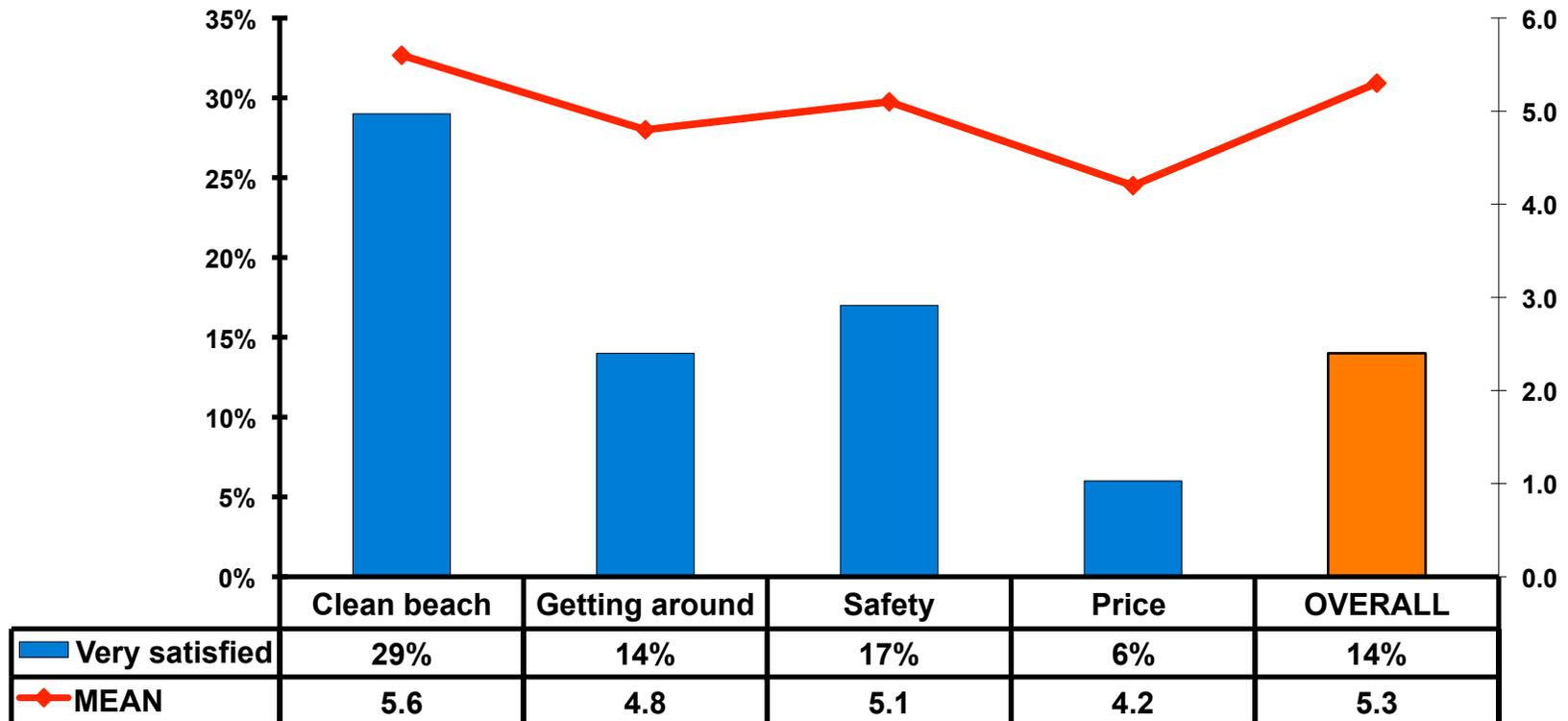
	MEAN \$
Food & Beverages	\$5.20
Gifts/Souvenirs Self	\$38.30
Gifts/Souvenirs Others	\$18.50
Total	\$62.10

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

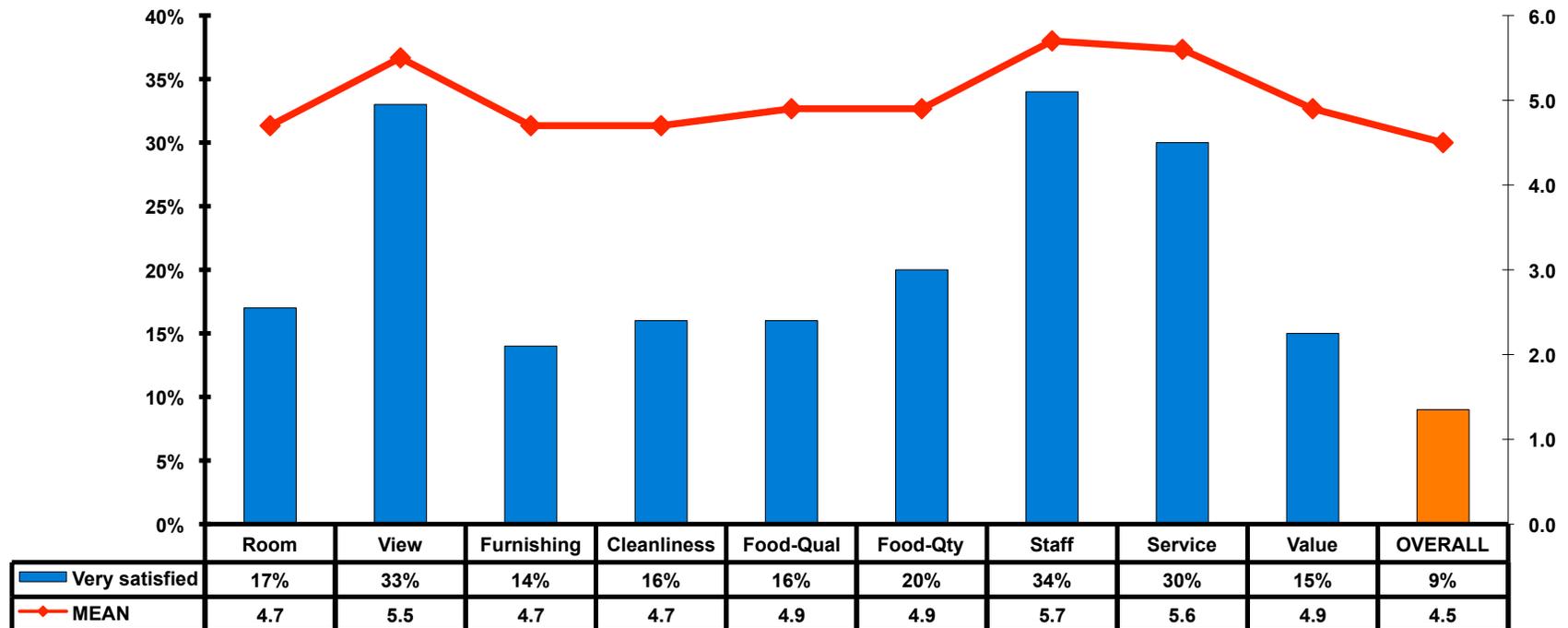
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

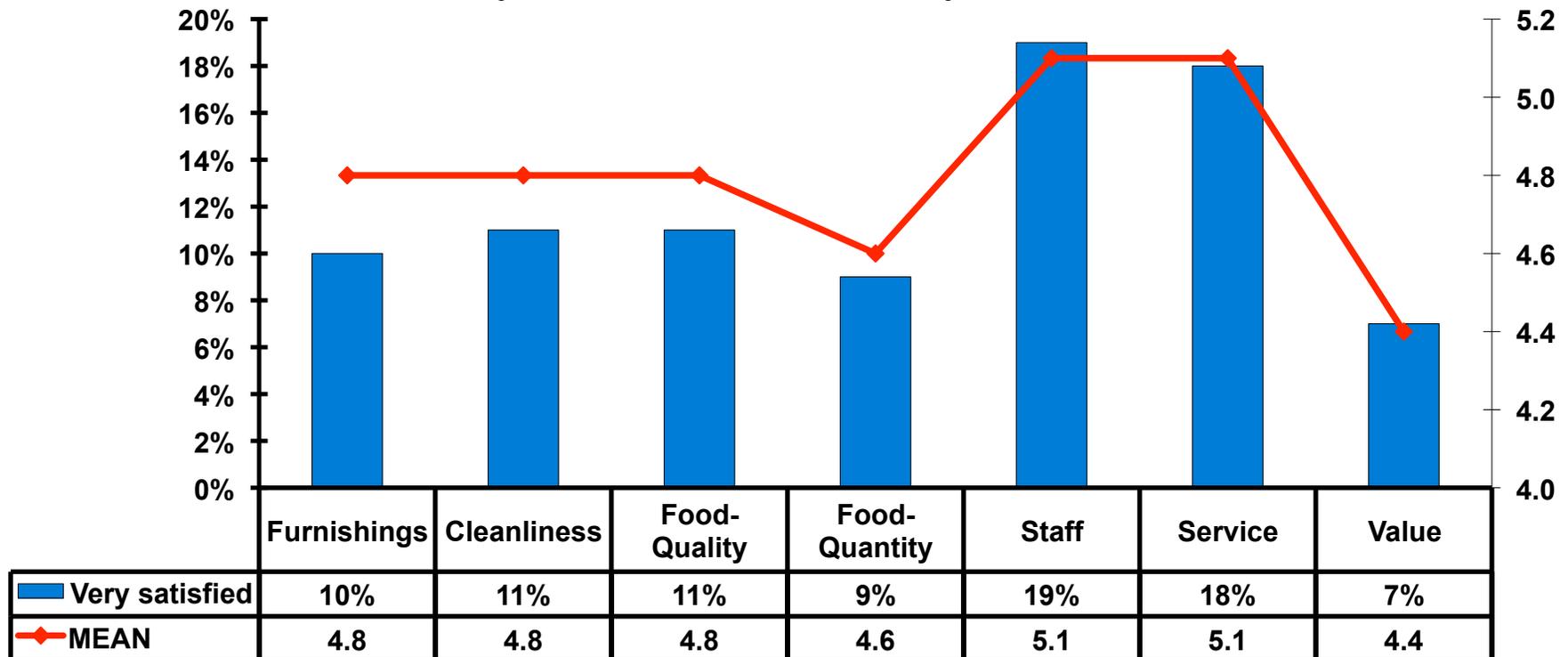
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

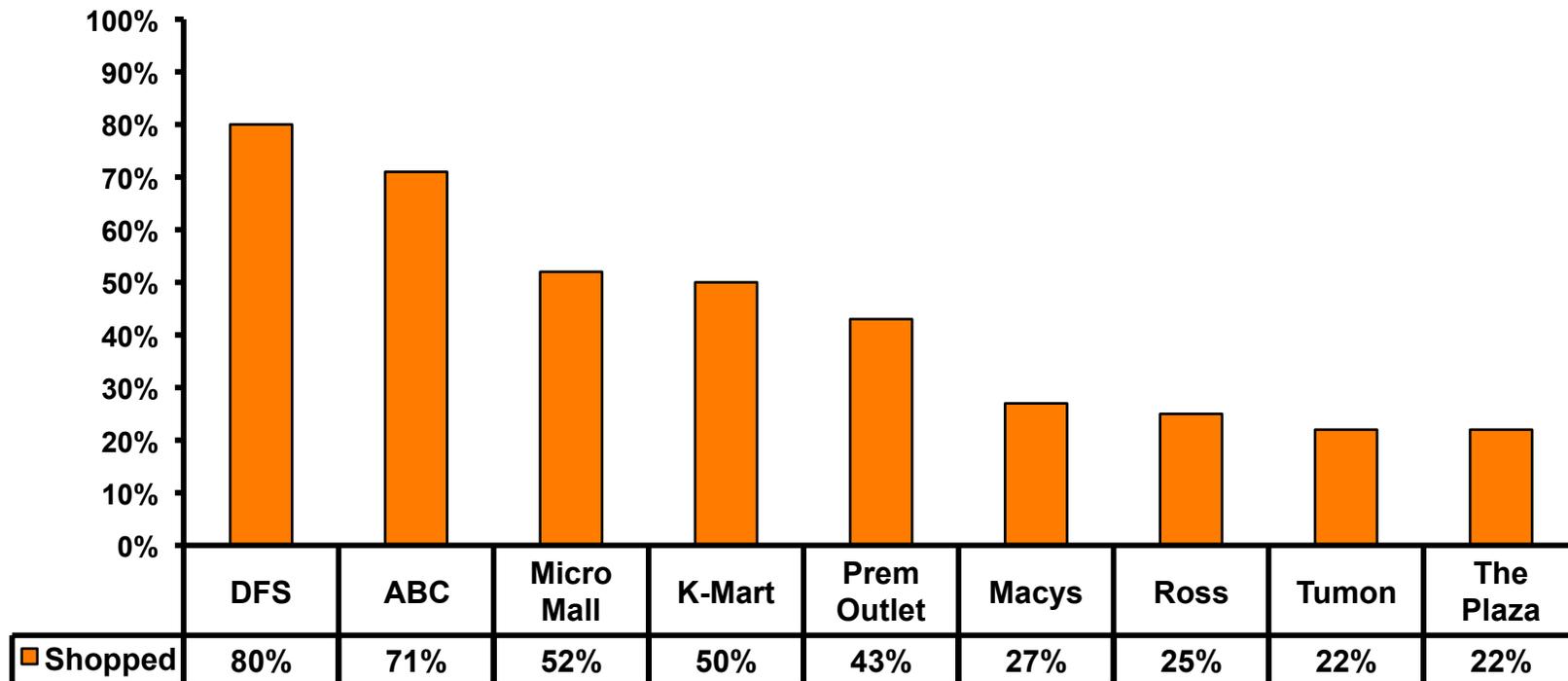
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

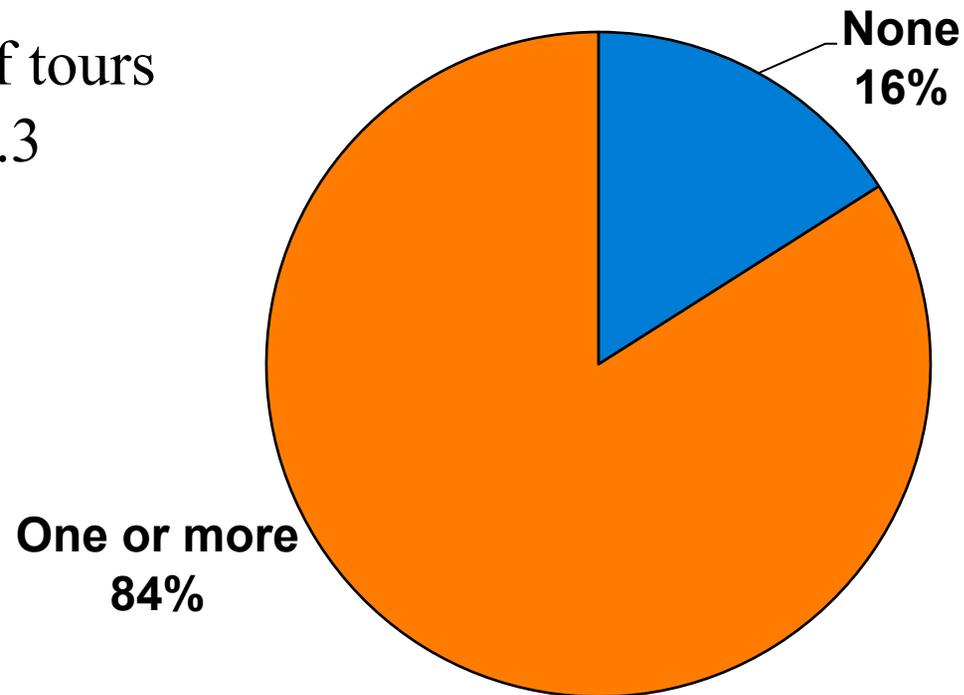
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 42%	Score of 6 to 7 = 37%
Score of 4 to 5 = 50%	Score of 4 to 5 = 50%
Score 1 to 3 = 7%	Score 1 to 3 = 14%
MEAN = 5.1	MEAN = 4.9

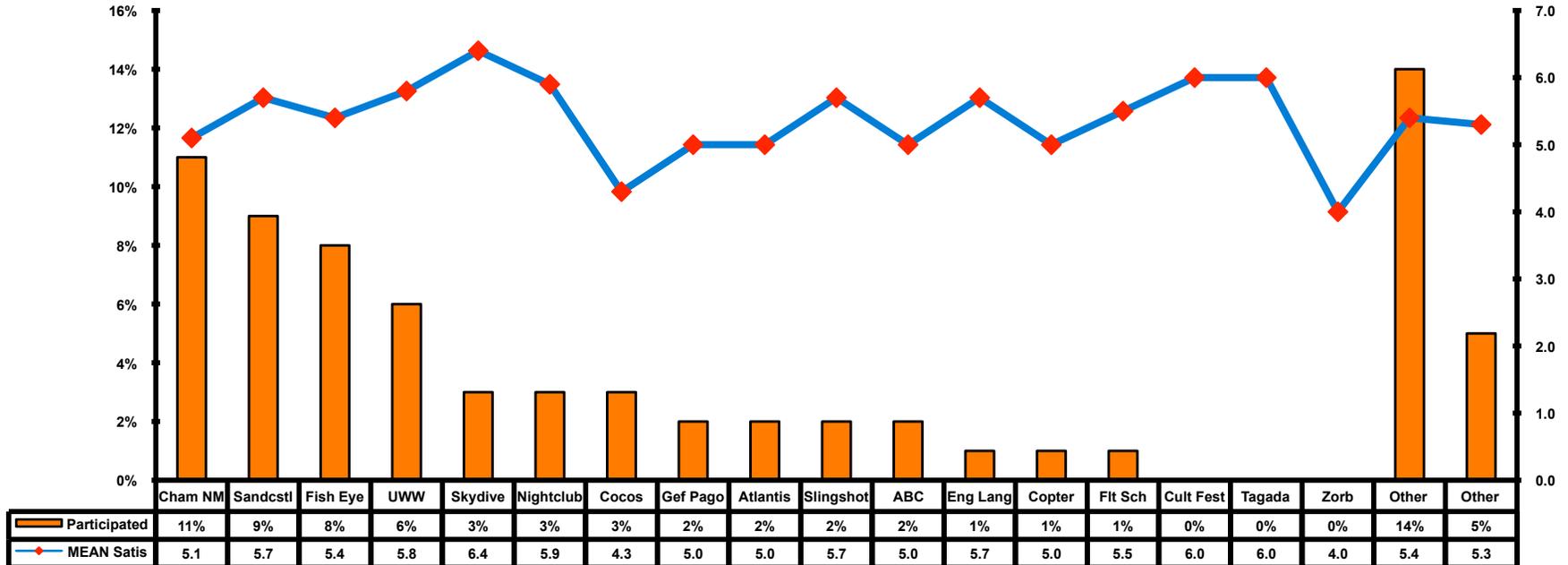
Optional Tour Participation

- Average number of tours participated in is 2.3



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 = 33%
Score of 4 to 5 = 50%	Score of 4 to 5 = 54%
Score 1 to 3 = 10%	Score 1 to 3 = 13%
MEAN = 5.0	MEAN = 4.7

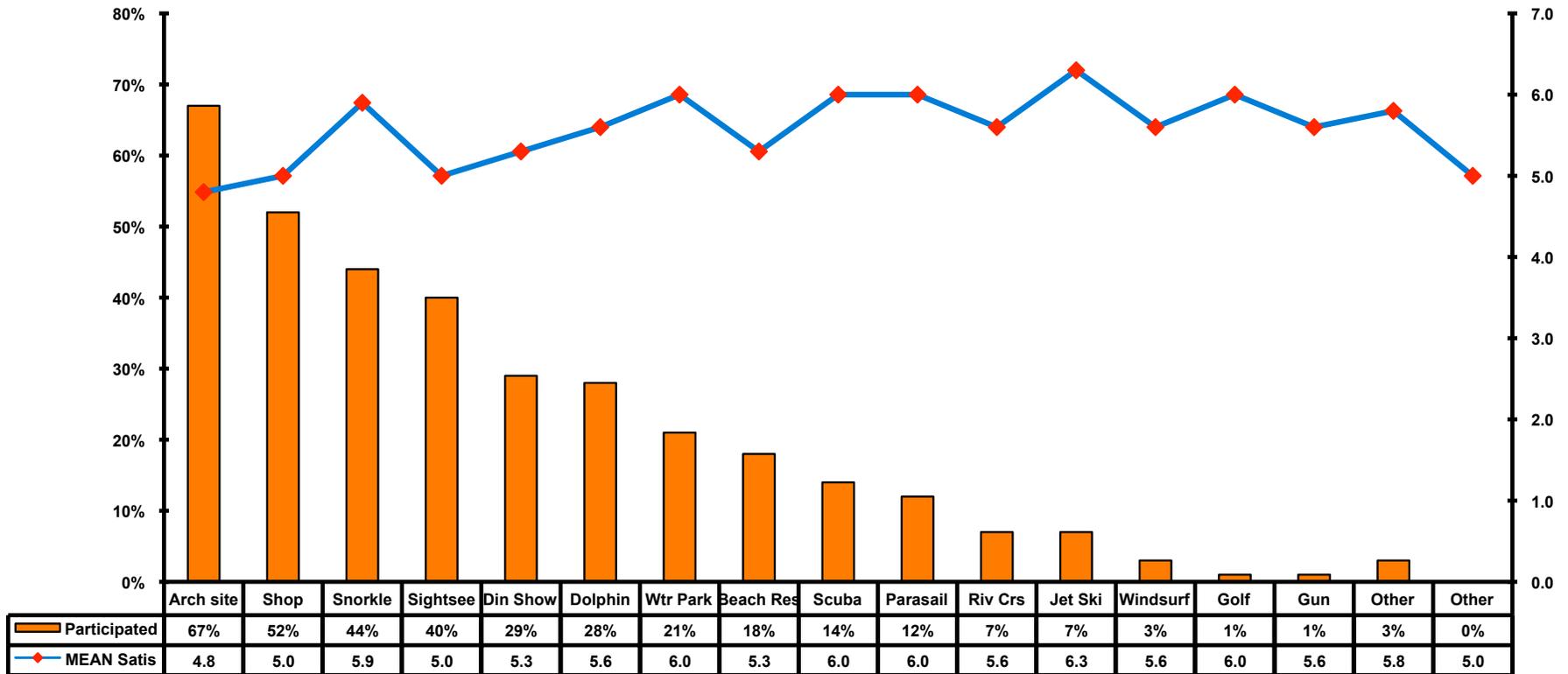
Night Tours Satisfaction

7pt Rating Scale

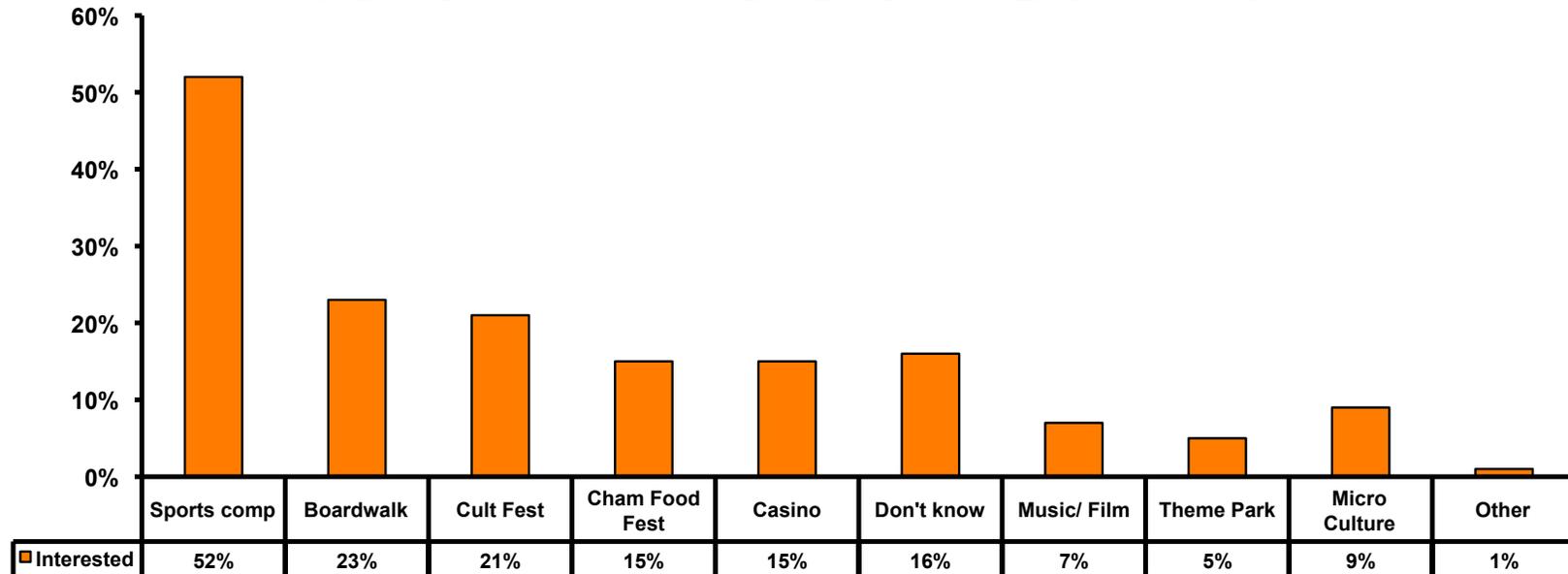
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 23%	Score of 6 to 7 = 24%
Score of 4 to 5 = 63%	Score of 4 to 5 = 60%
Score 1 to 3 = 14%	Score 1 to 3 = 17%
MEAN = 4.5	MEAN = 4.4

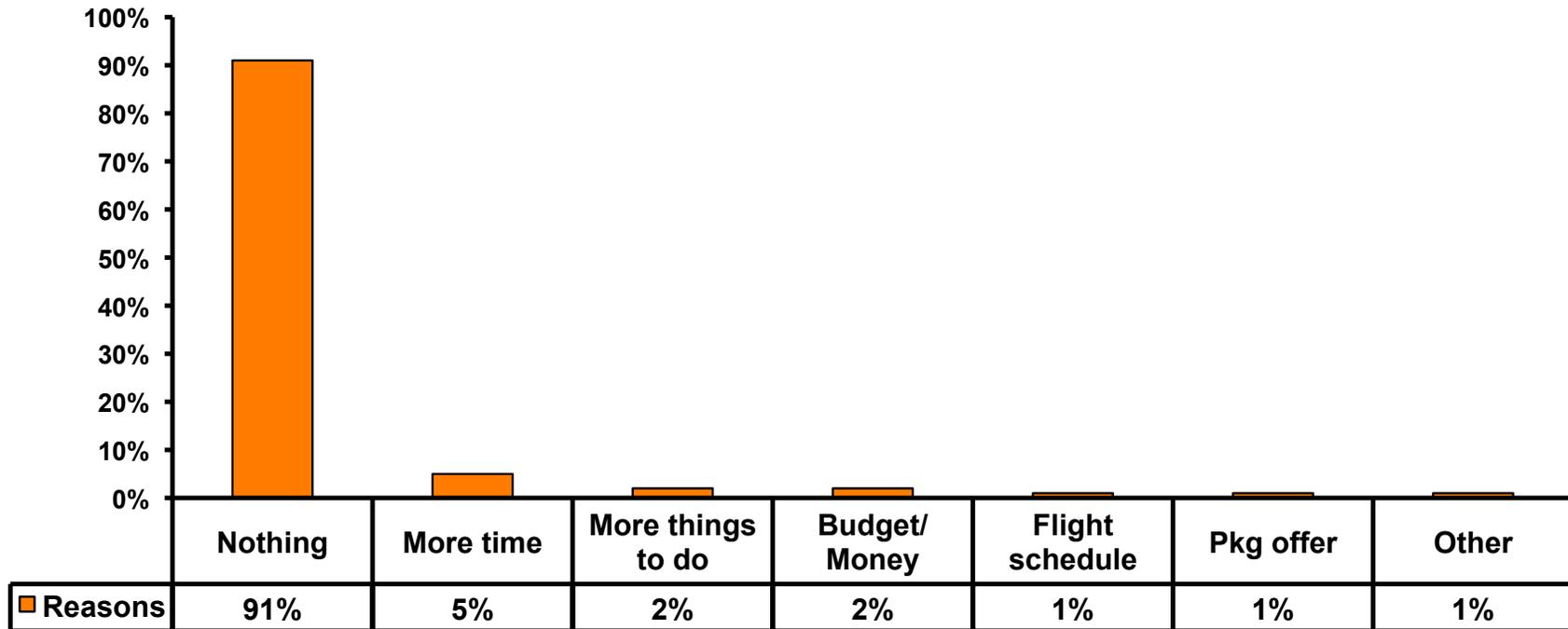
Satisfaction with Other Activities



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



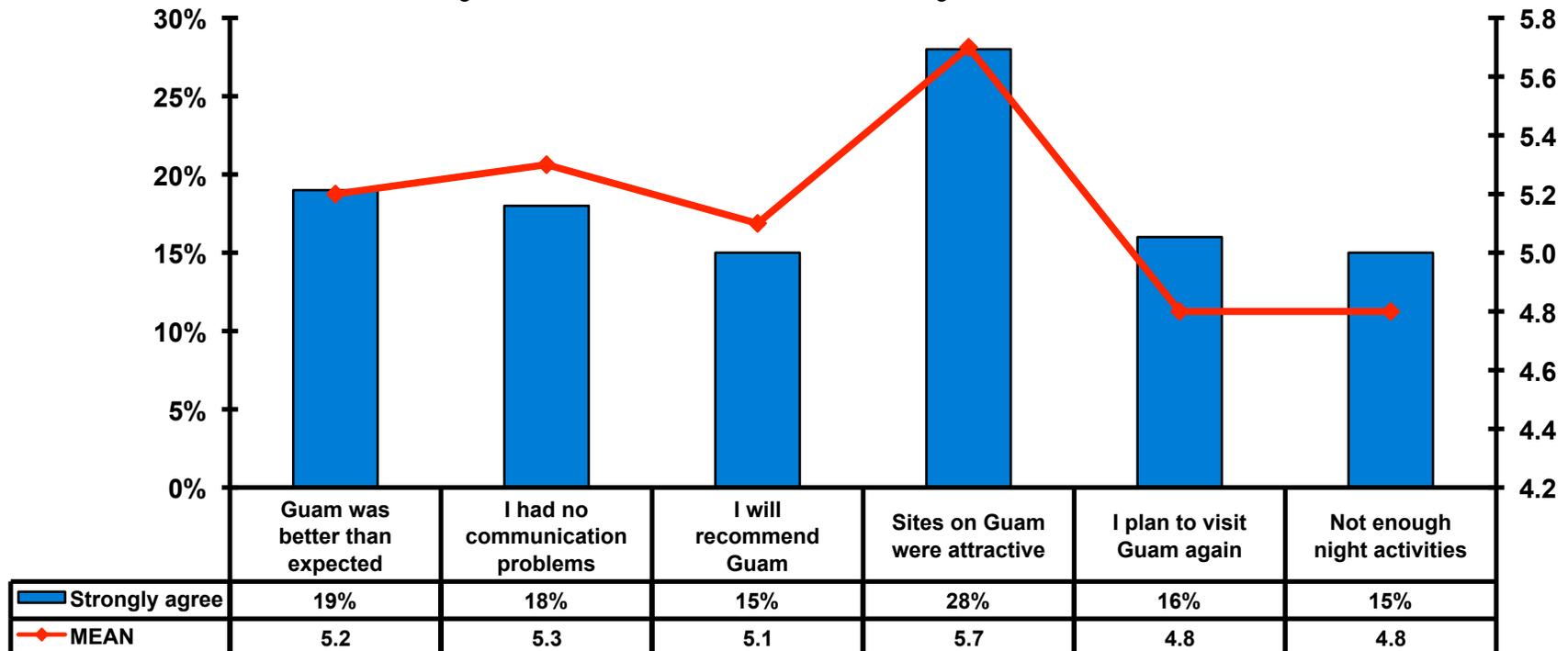
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

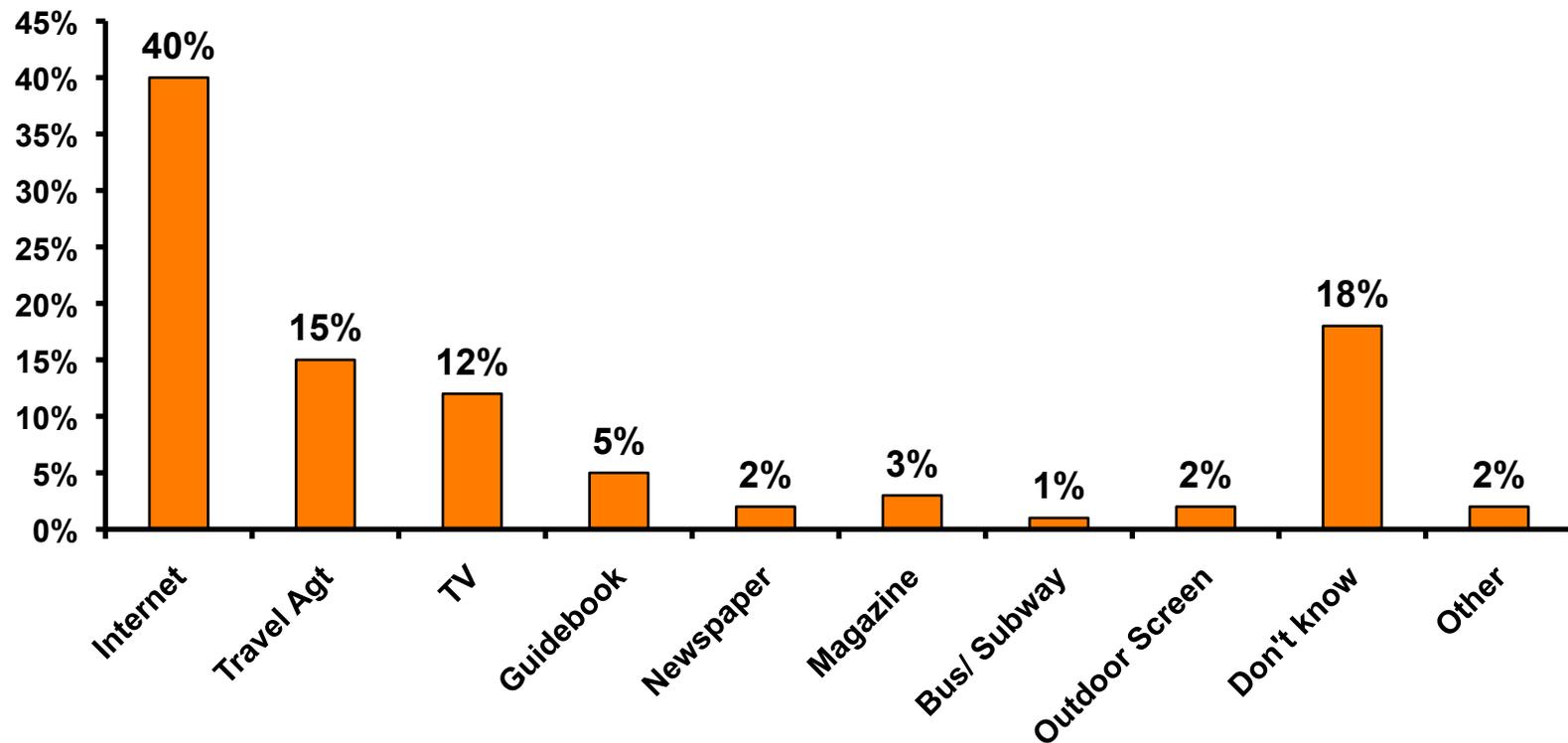
7=Very Satisfied/ 1=Very Dissatisfied



SECTION 5 **PROMOTIONS**

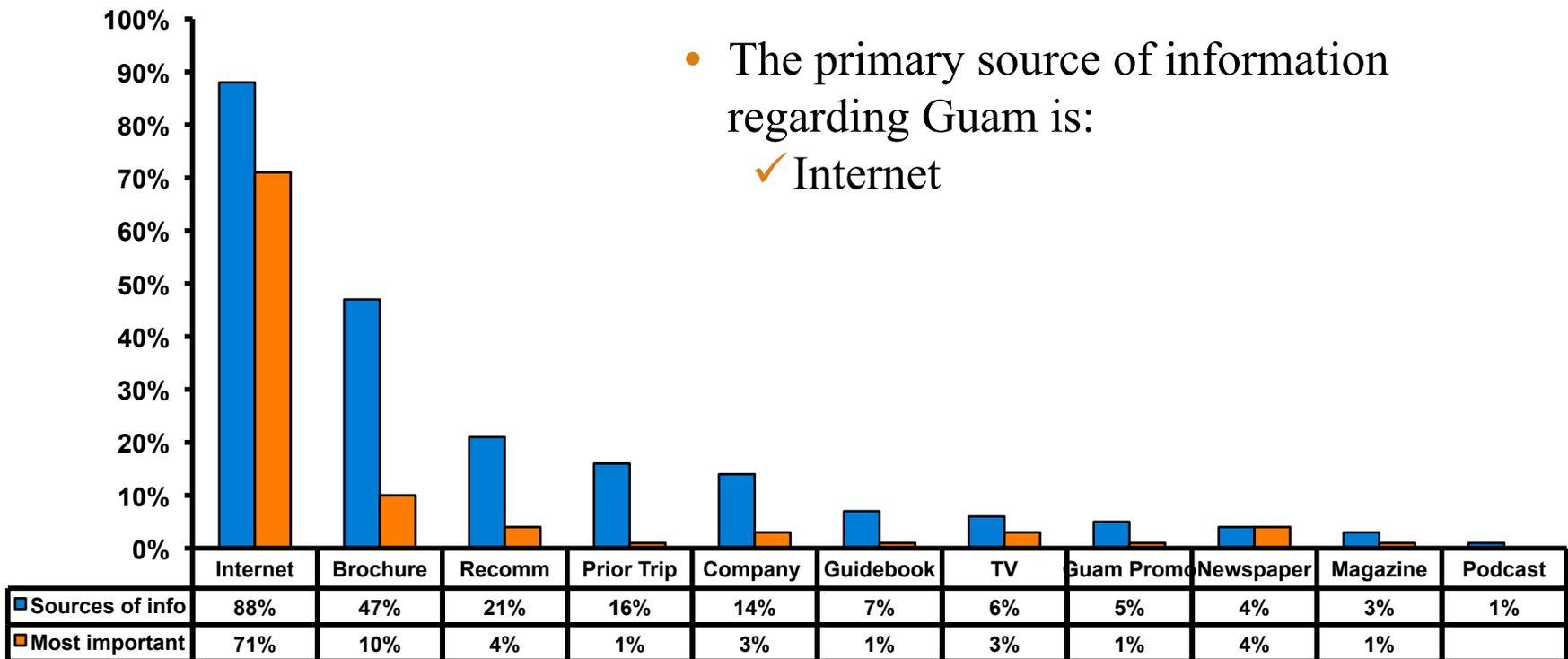
Guam Promotion - Media

Past 90 days



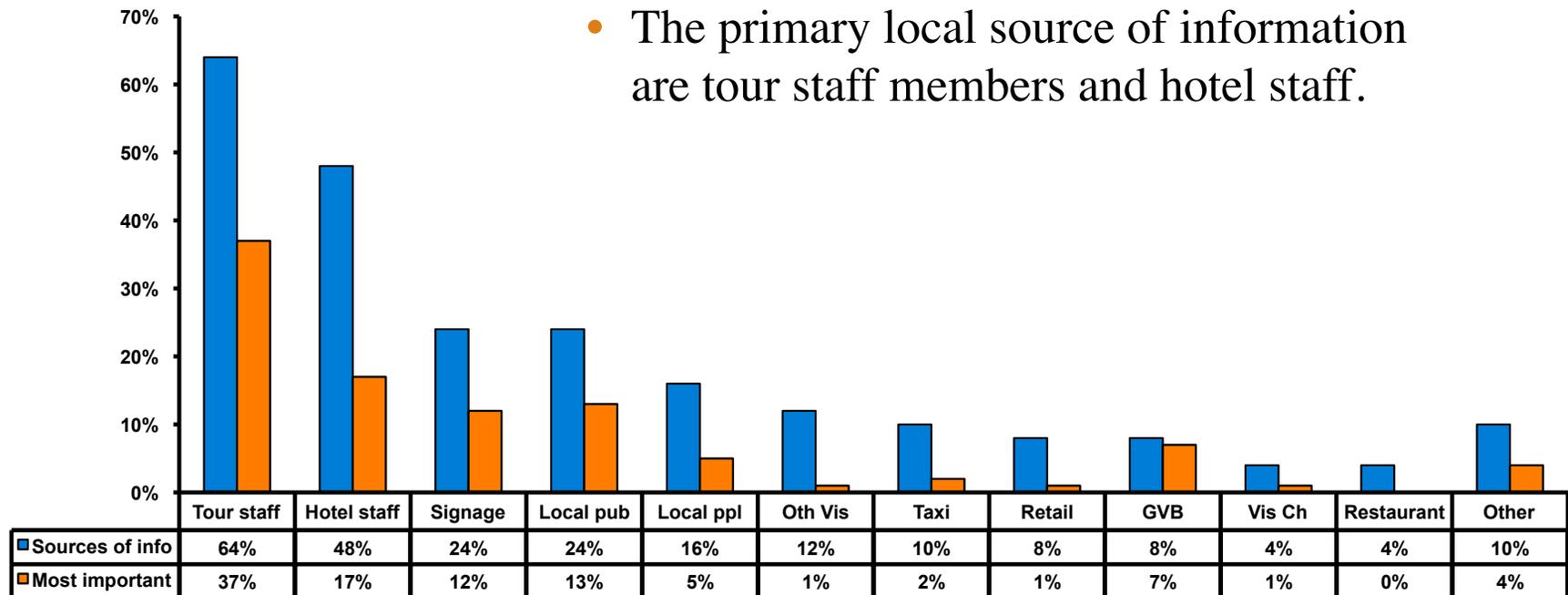
Sources of Information Pre-arrival

- The primary source of information regarding Guam is:
 ✓ Internet



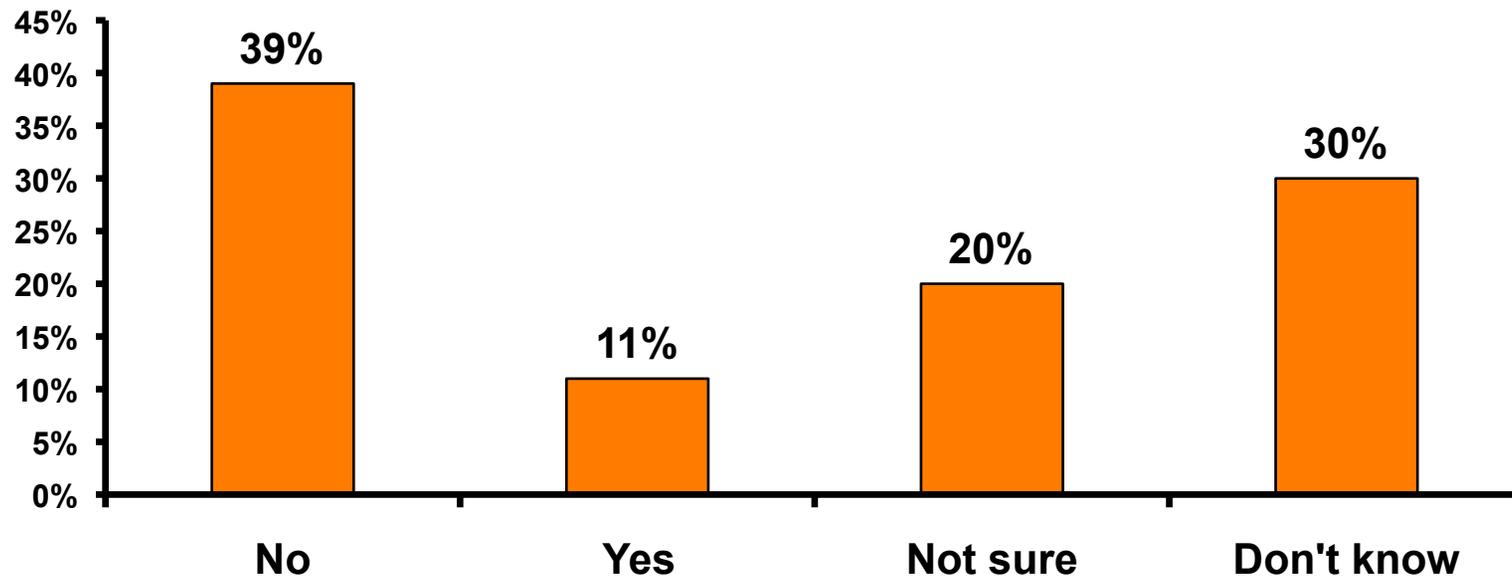
Sources of Information Post-arrival

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



SECTION 6
OTHER ISSUES

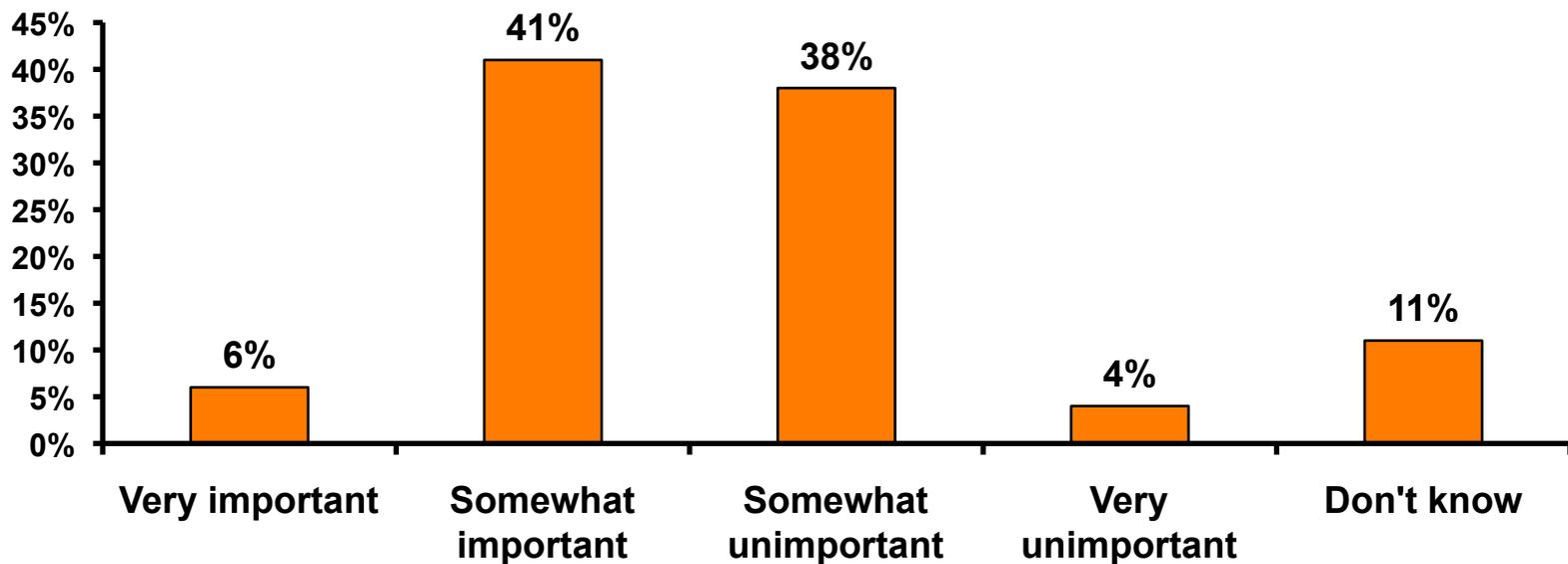
Good time to spend money on travel outside of Korea - Overall



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	33%	28%	39%	42%	82%	44%	41%	35%	43%	33%
	Yes	33%	17%	7%	16%	9%	19%	5%	10%	17%	20%
	Not sure		16%	23%	21%		13%	24%	21%	17%	13%
	Do not know	33%	40%	31%	22%	9%	25%	31%	34%	23%	33%
Total	Count	3	58	204	77	11	16	106	107	90	15

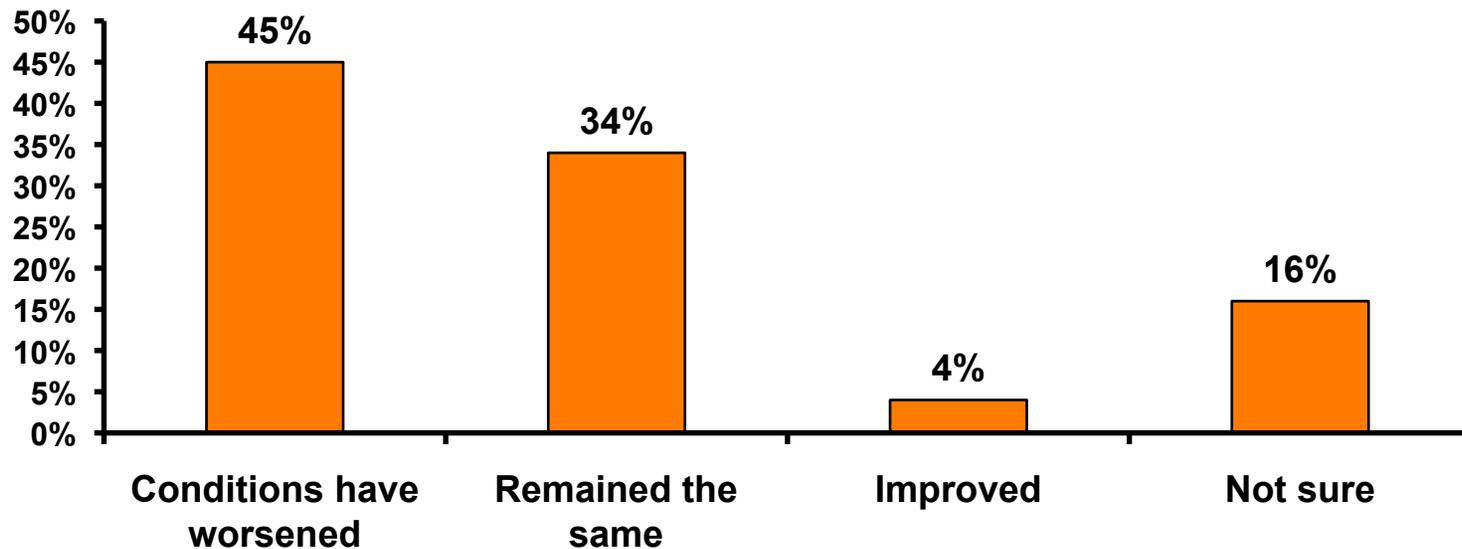
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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		5%	3%	5%		3%	7%	1%	7%	
	Somewhat unimportant		34%	43%	32%	25%	34%	45%	47%	13%	
	Somewhat important	33%	38%	39%	48%	27%	50%	45%	35%	40%	
	Very important	33%	10%	4%	1%	45%	6%	7%	7%	3%	
	Don't know	33%	12%	11%	13%		19%	11%	7%	9%	
Total	Count	3	58	204	77	11	16	106	107	90	

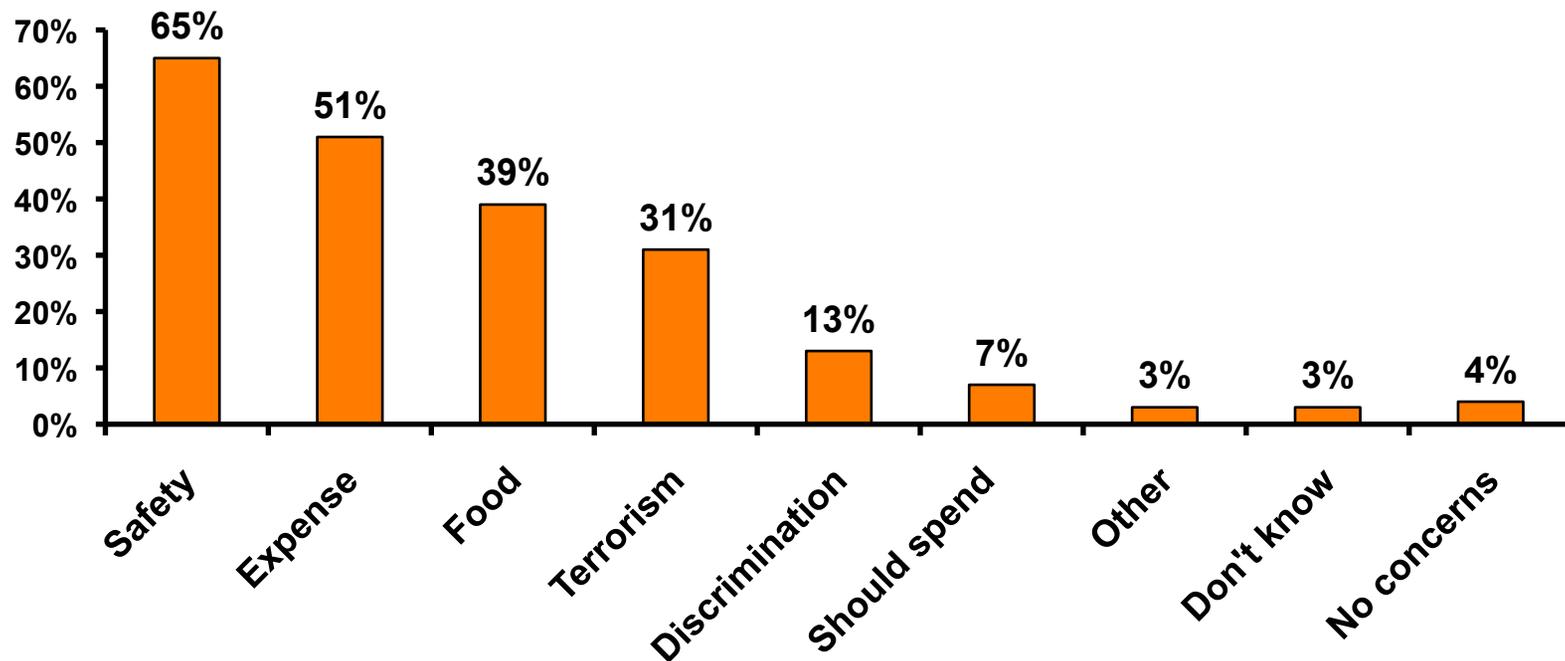
Rating Korean Economy Compared to 12 months ago



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	100%	36%	43%	53%	55%	38%	50%	39%	49%	47%
	Conditions have remained the same		41%	35%	27%	45%	25%	32%	36%	41%	20%
	Conditions have improved		5%	4%	5%		13%	2%	4%	3%	20%
	Do not know		17%	18%	14%		25%	16%	21%	7%	13%
Total	Count	3	58	204	77	11	16	106	107	90	15

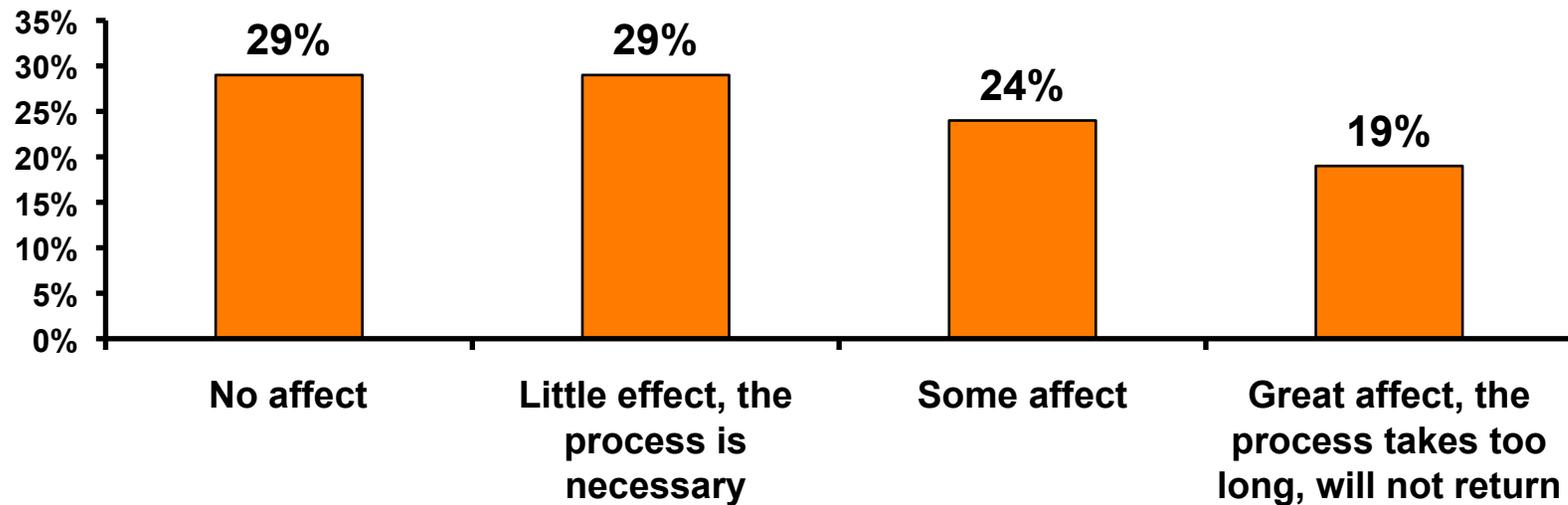
Concerns about travel outside of Korea - Overall



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	67%	62%	66%	67%	55%	50%	61%	71%	68%	80%
	Expense	100%	64%	50%	45%	27%	50%	54%	55%	40%	67%
	Food	33%	38%	43%	32%	36%	38%	39%	39%	42%	33%
	Terrorism		24%	35%	29%	27%	25%	33%	27%	42%	20%
	Spending money abroad when it should be spent at home	33%	5%	7%	5%	36%	13%	8%	8%	5%	7%
	No concerns		5%	2%	7%			4%	4%	5%	
	Other	33%	3%	3%	1%			5%	2%	3%	7%
	Do not know		2%	3%	5%		6%	3%	2%	5%	
Total	Cases	3	58	202	75	11	16	106	107	88	15

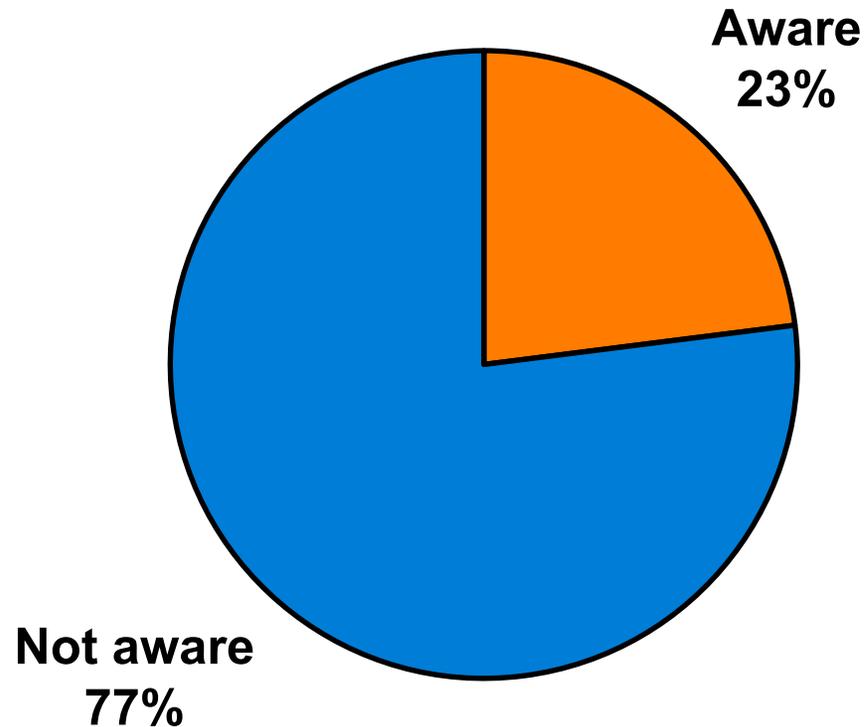
Security Screening/ Immigration Process at Guam International Airport



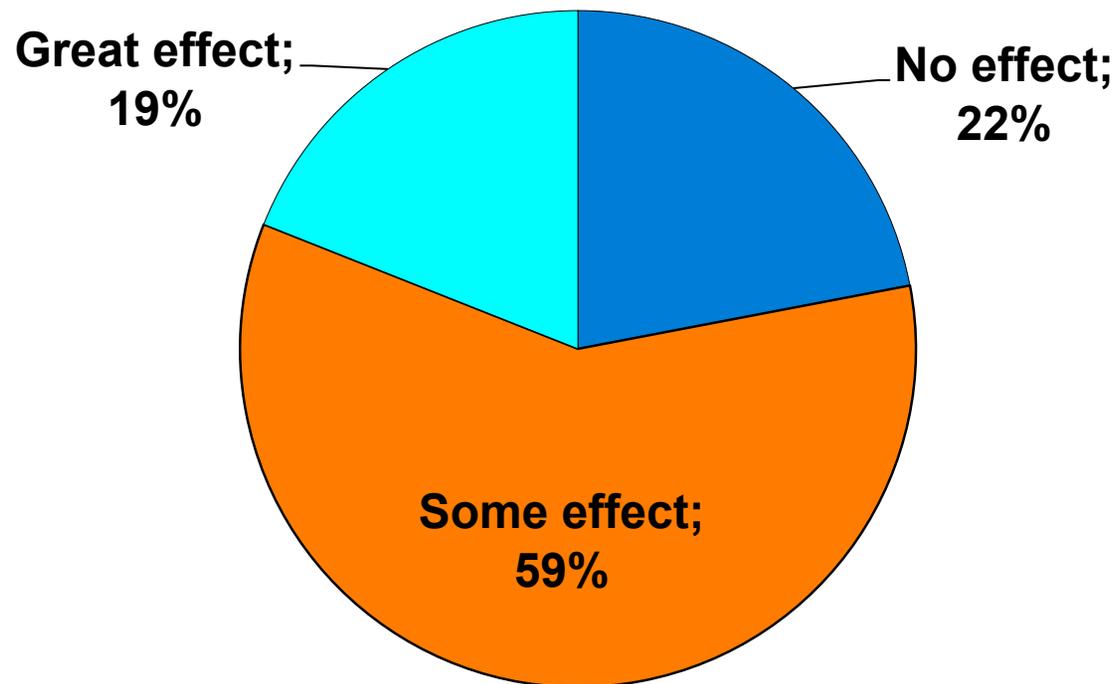
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **10%**
- Neutral (Score 4-5) – **40%**
- Disagree (Score 1-3) – **50%**

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



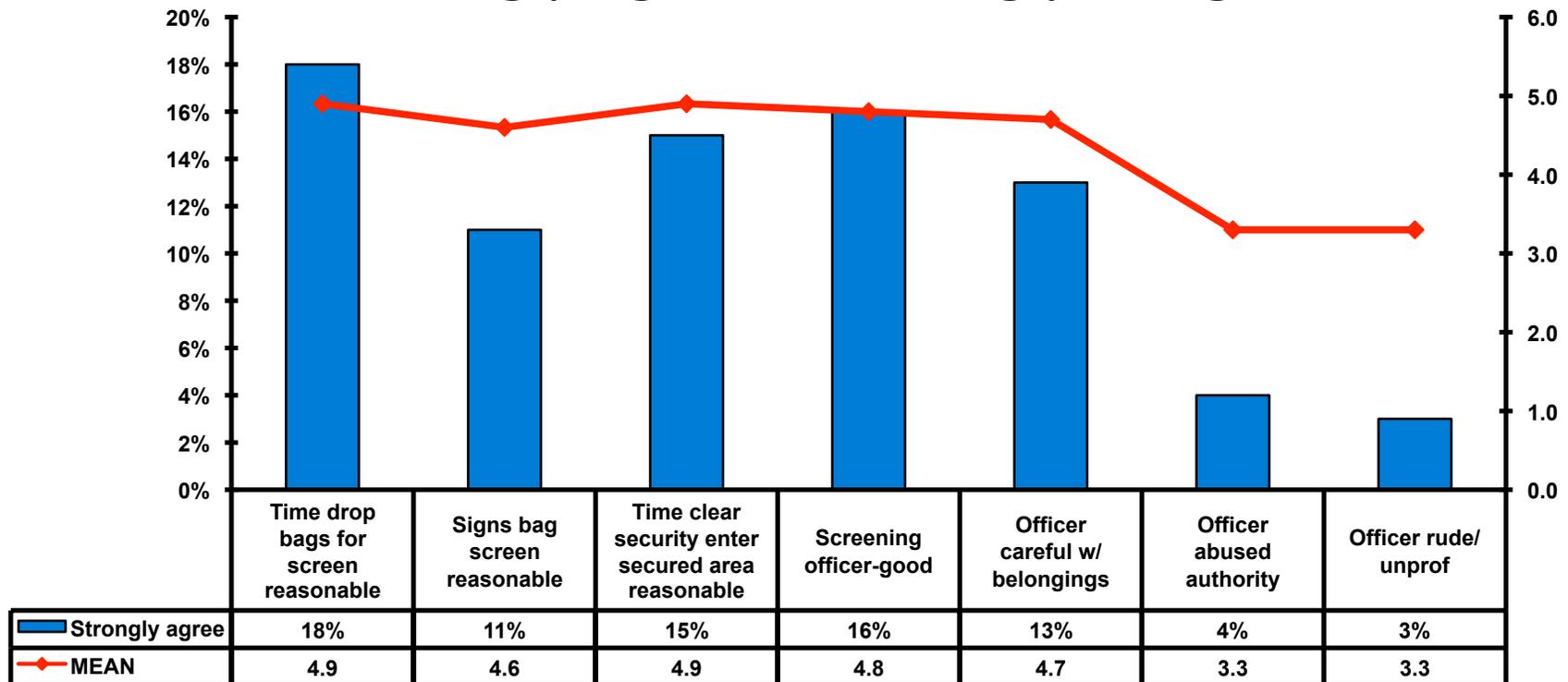
Effects of U.S. military troop movement on future trips to Guam



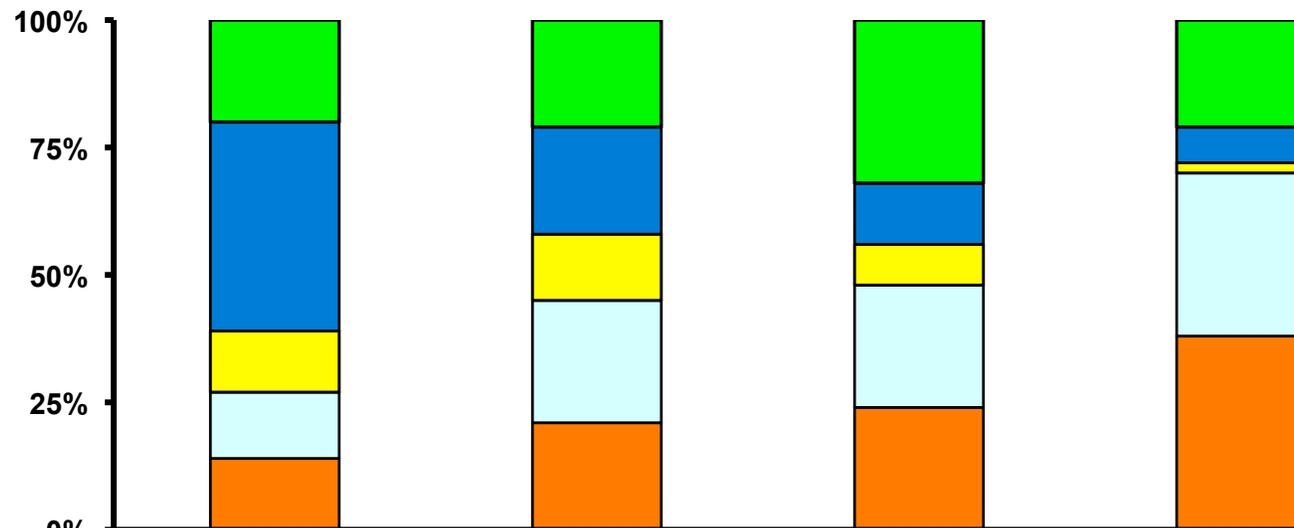
Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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



	6 months	12 months	18 months	24 months
■ Unsure	20%	21%	32%	21%
■ Very unlikely	41%	21%	12%	7%
■ Somewhat unlikely	12%	13%	8%	2%
■ Somewhat likely	13%	24%	24%	32%
■ Very likely	14%	21%	24%	38%