



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

JUNE 2011



Prepared by: QMark Research

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Background & Methodology

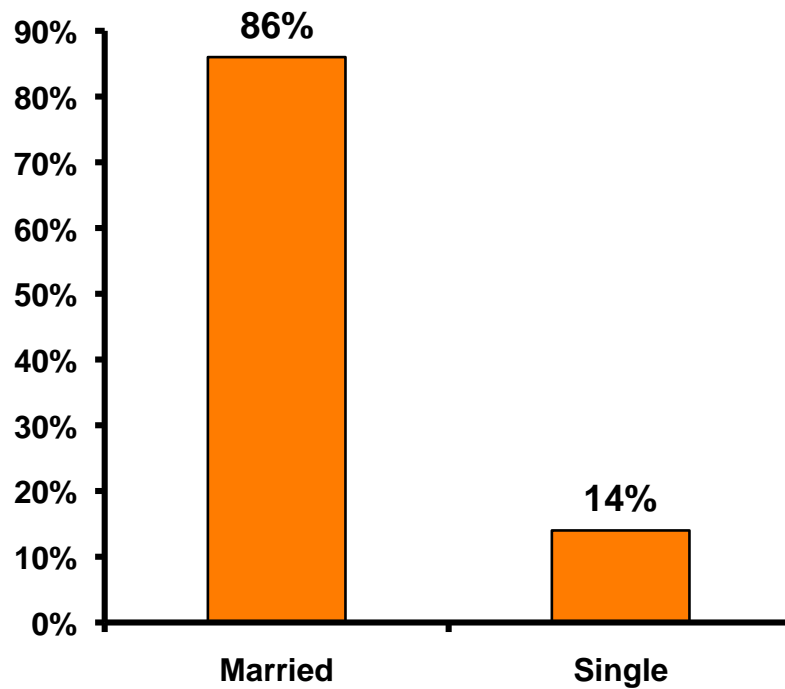
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

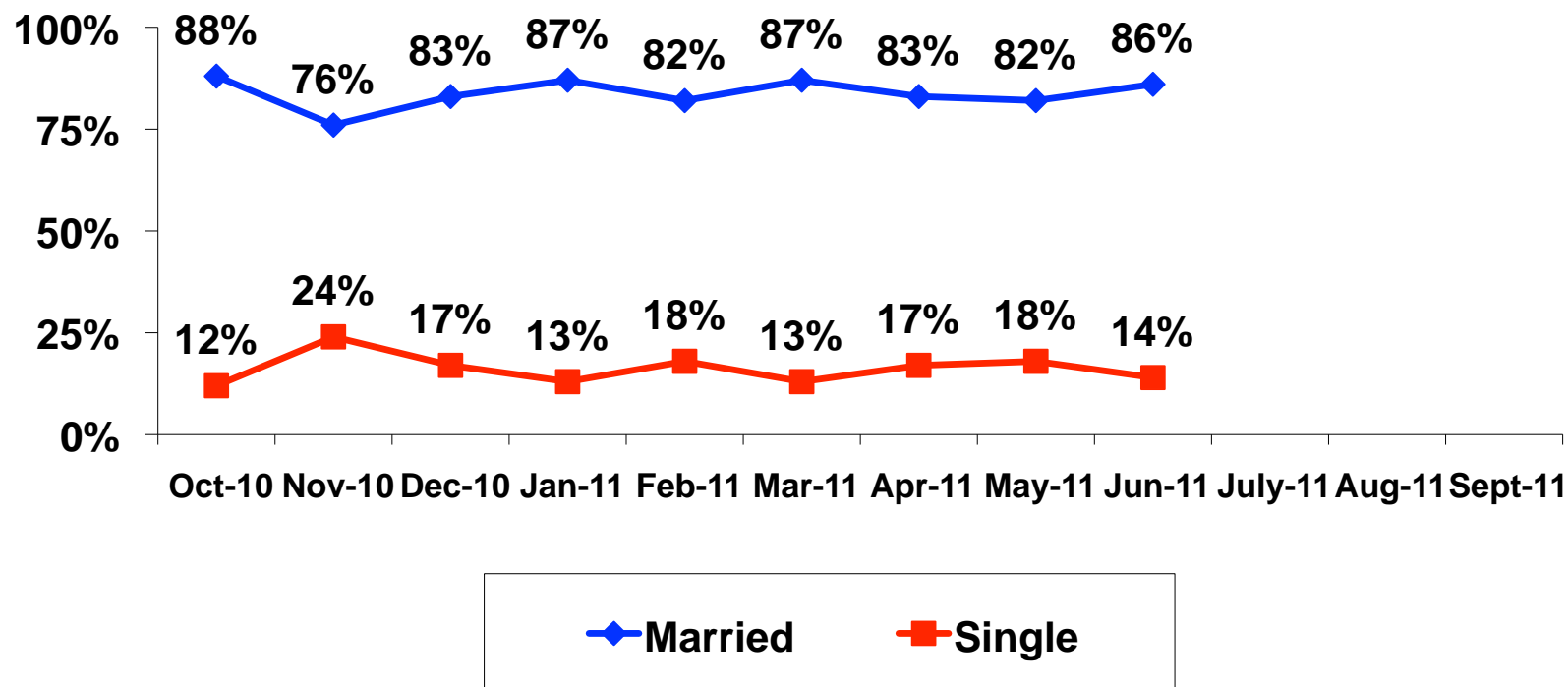
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

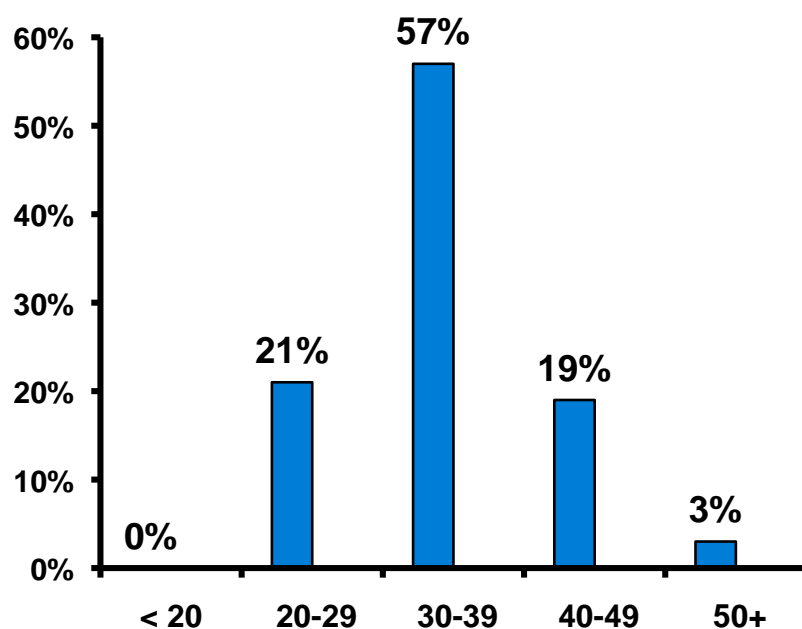


- A majority of visitors are married.

MARITAL STATUS

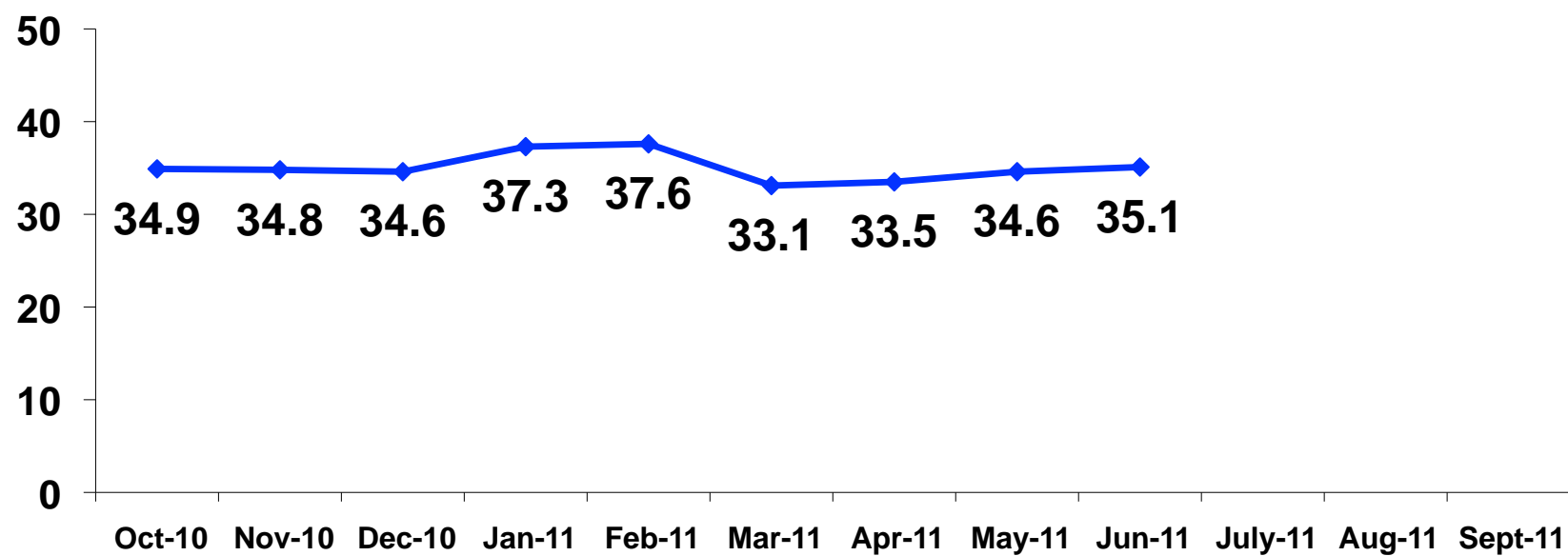


Age - Overall

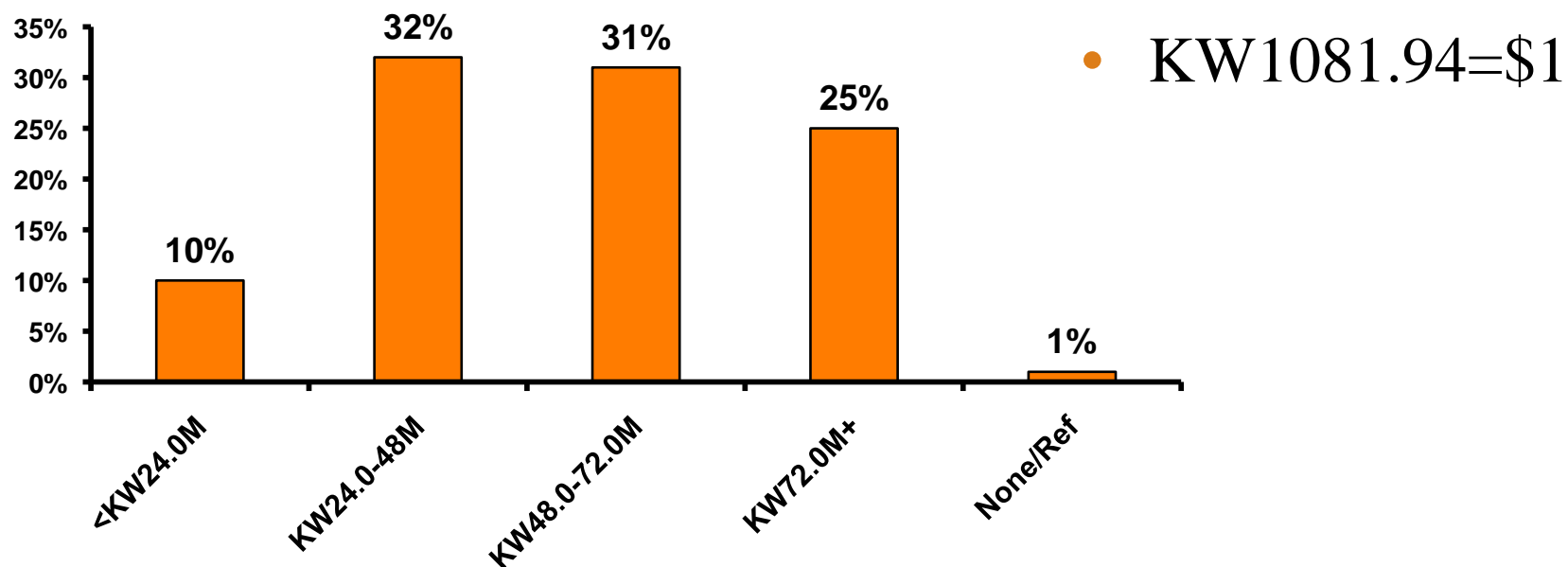


- The average age of the respondents is 35.1 years of age.

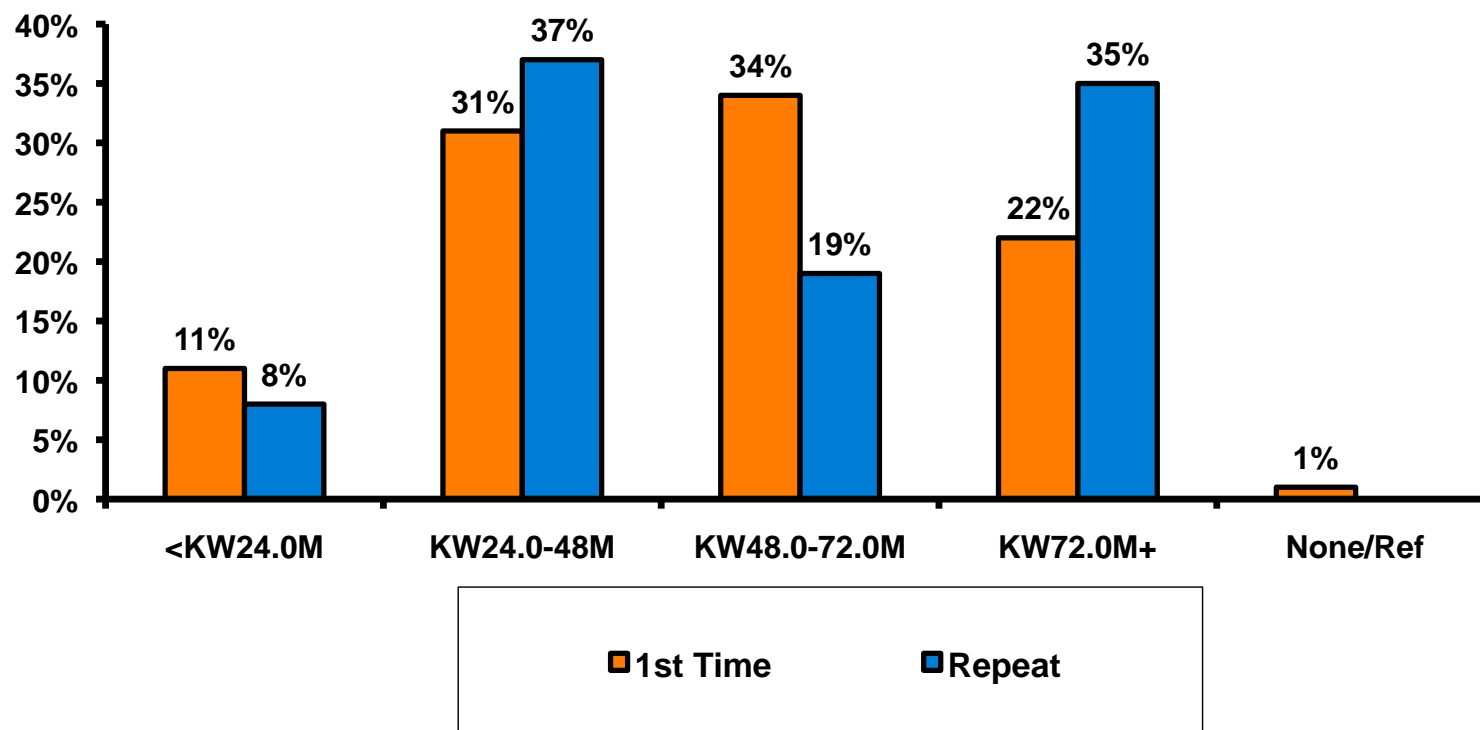
AVERAGE - AGE



Personal Income



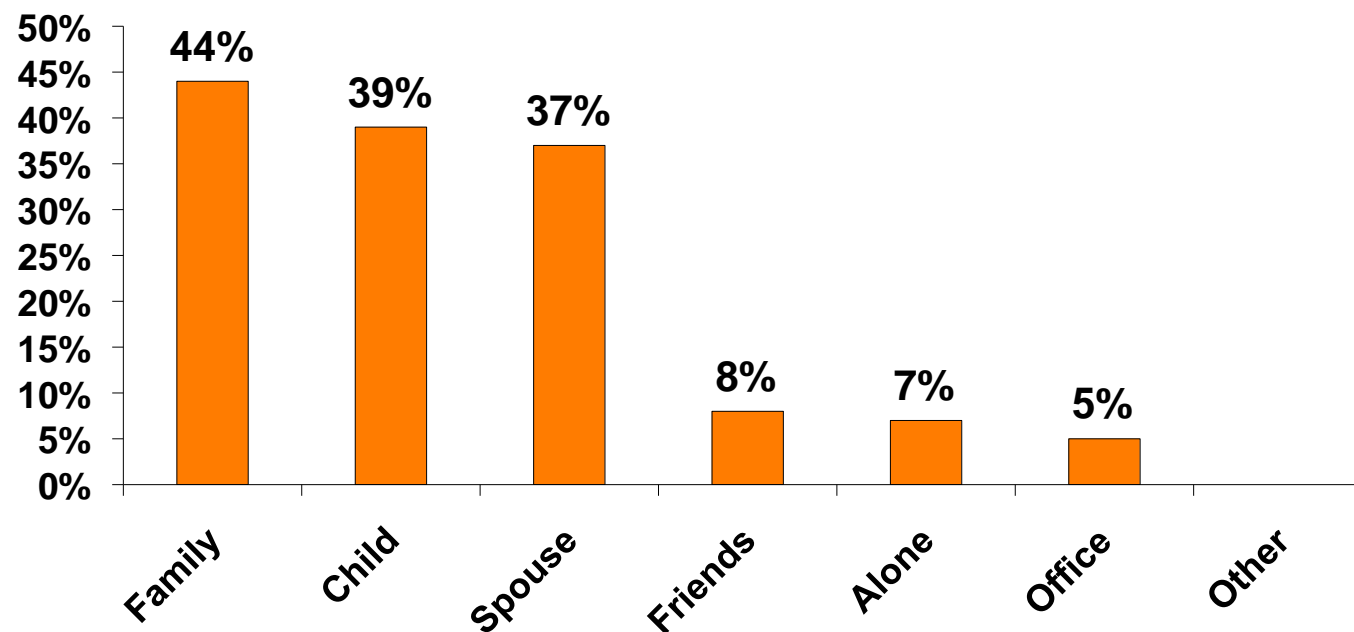
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	35	11	24		18	14	2	1
			10%	6%	15%		26%	7%	3%	11%
	KW24.0M-KW48.0M	Count	110	55	55	1	29	63	13	4
			33%	32%	33%	100%	41%	33%	21%	44%
	KW48.0M-KW72.0M	Count	104	55	49		14	62	26	2
			31%	32%	30%		20%	32%	41%	22%
	KW72.0M+	Count	83	48	35		8	51	22	2
			25%	28%	21%		11%	26%	35%	22%
	Refused	Count	4	2	2		1	3		
			1%	1%	1%		1%	2%		
Total	Count	336	171	165	1	70	193	63	9	

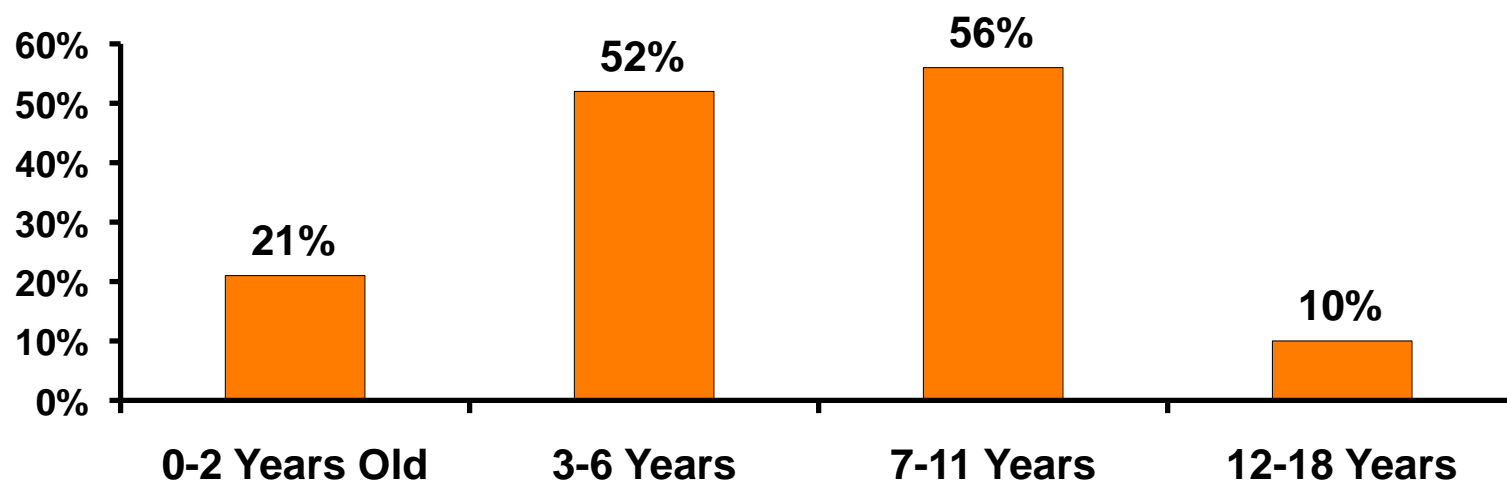
Travel Companions



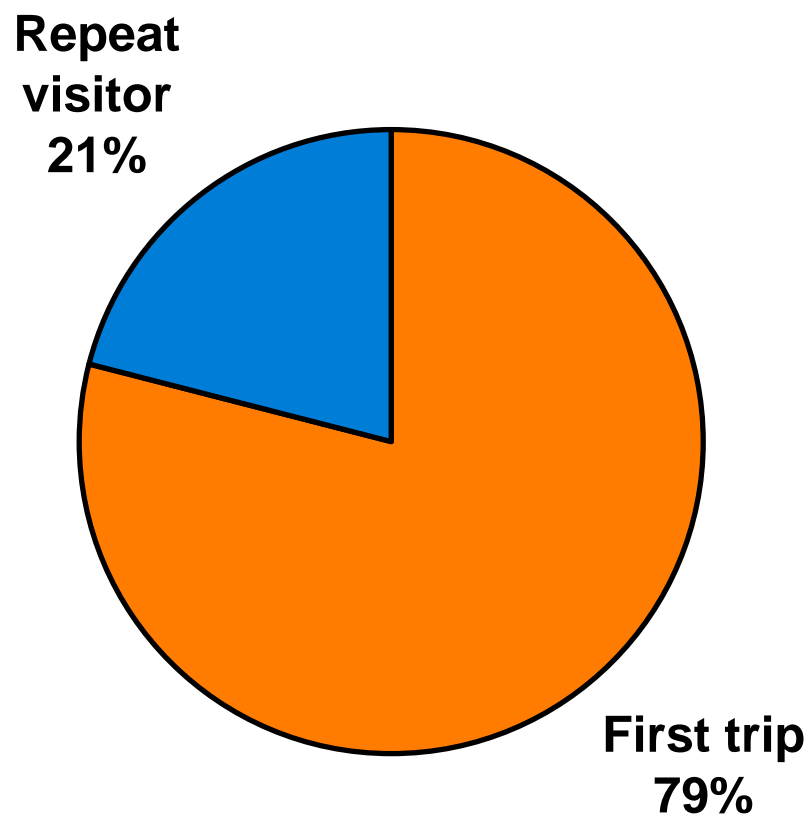
Number of Children Travel Party

N=137 total respondents traveling with children.

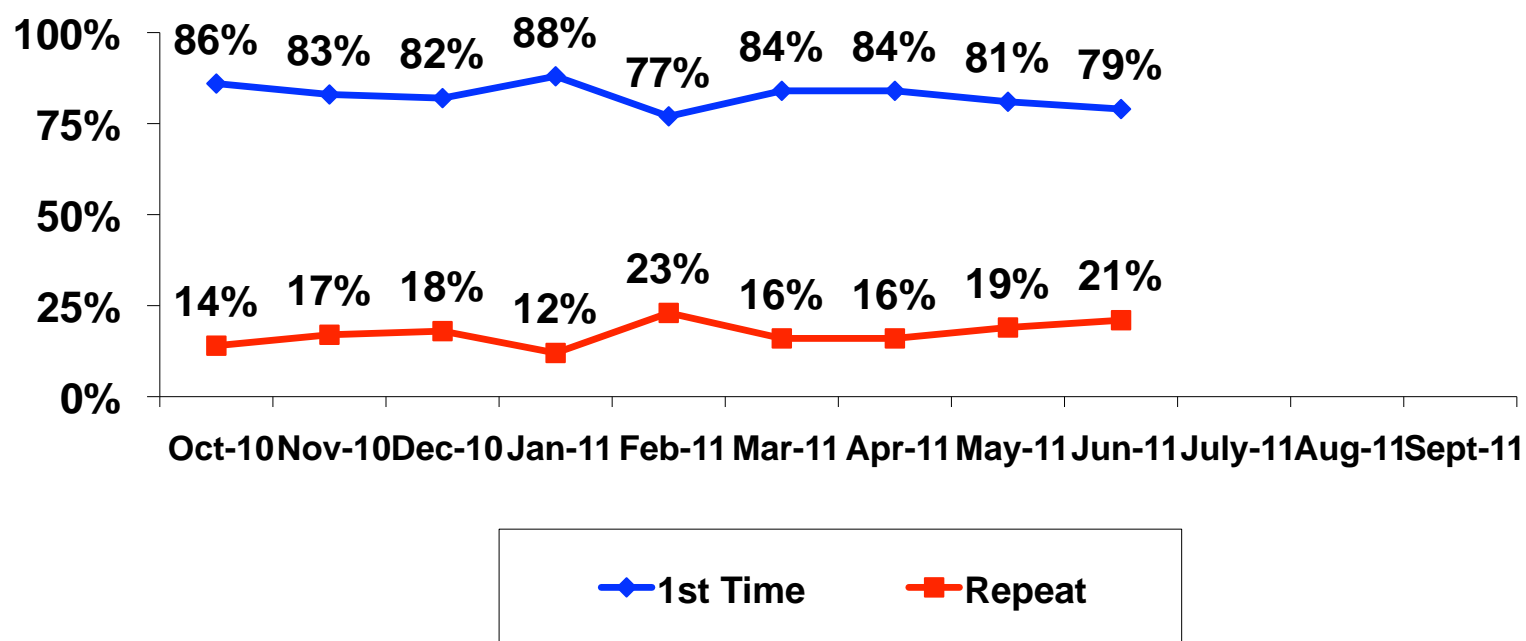
(Of those N=137 respondents, there is a total of **226** children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



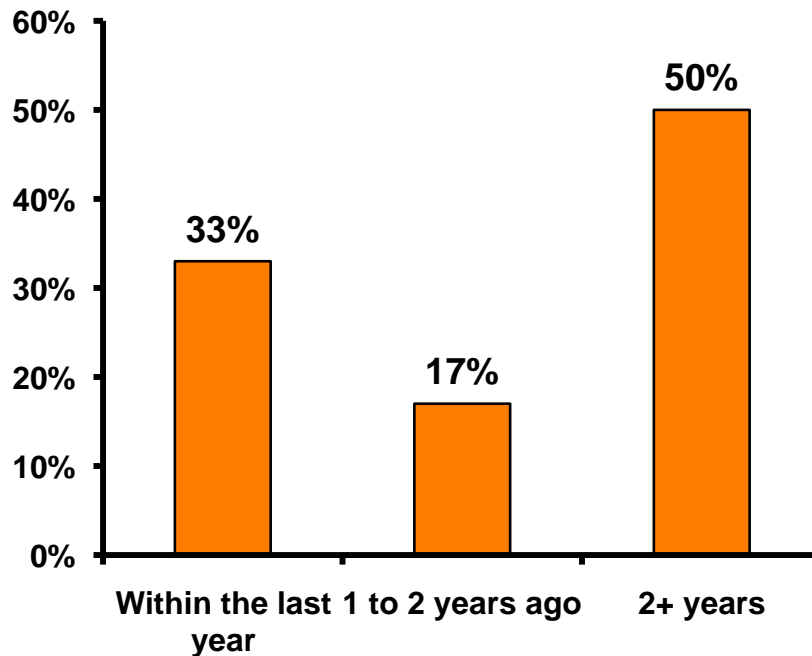
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	176	131	44
			50%	47%	60%
	Female	Count	176	147	29
			50%	53%	40%
Total	Count		352	278	73
AGE	<20	Count	1	1	
			0%	0%	
	20-29	Count	74	68	6
			21%	24%	8%
	30-39	Count	200	156	43
			57%	56%	59%
	40-49	Count	67	47	20
			19%	17%	27%
	50+	Count	10	6	4
			3%	2%	5%
Total	Count		352	278	73

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

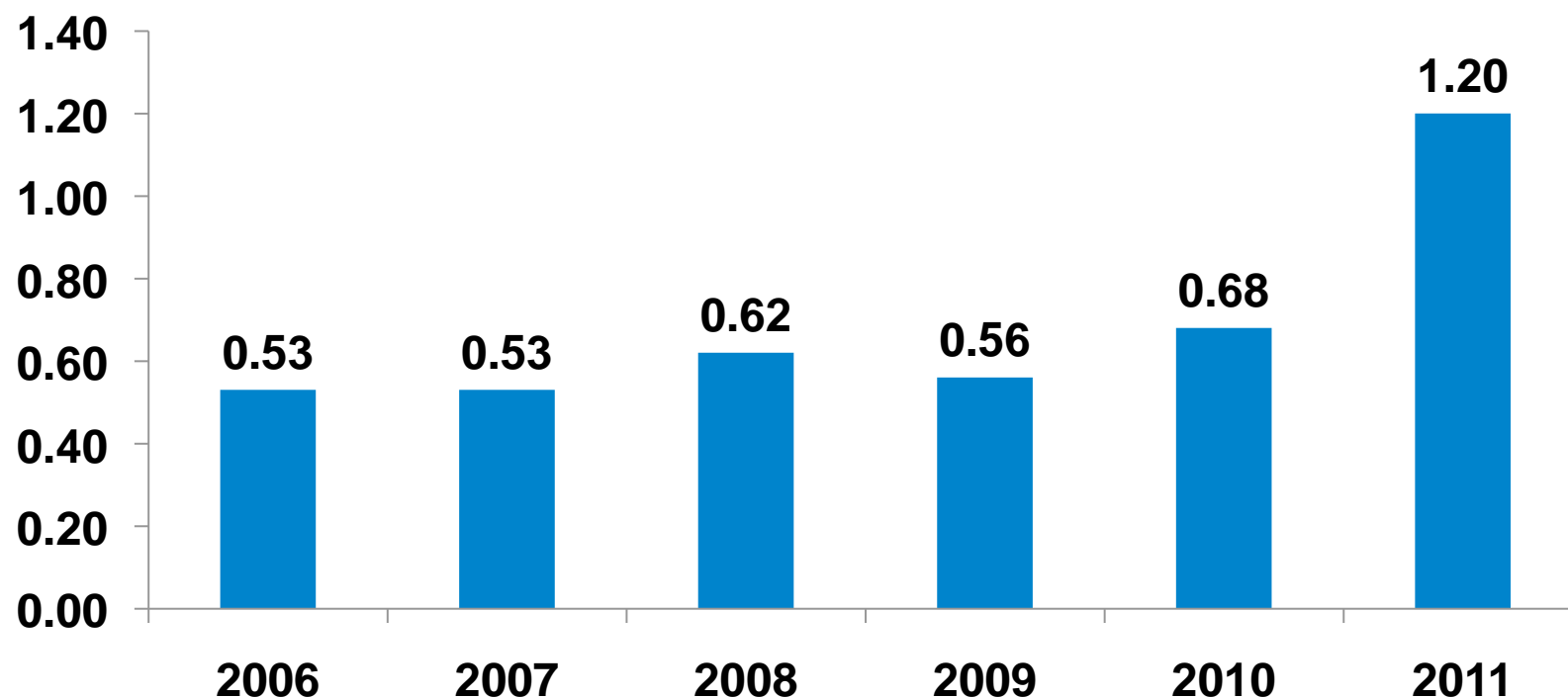
Repeat Visitors Last Trip

n = 72

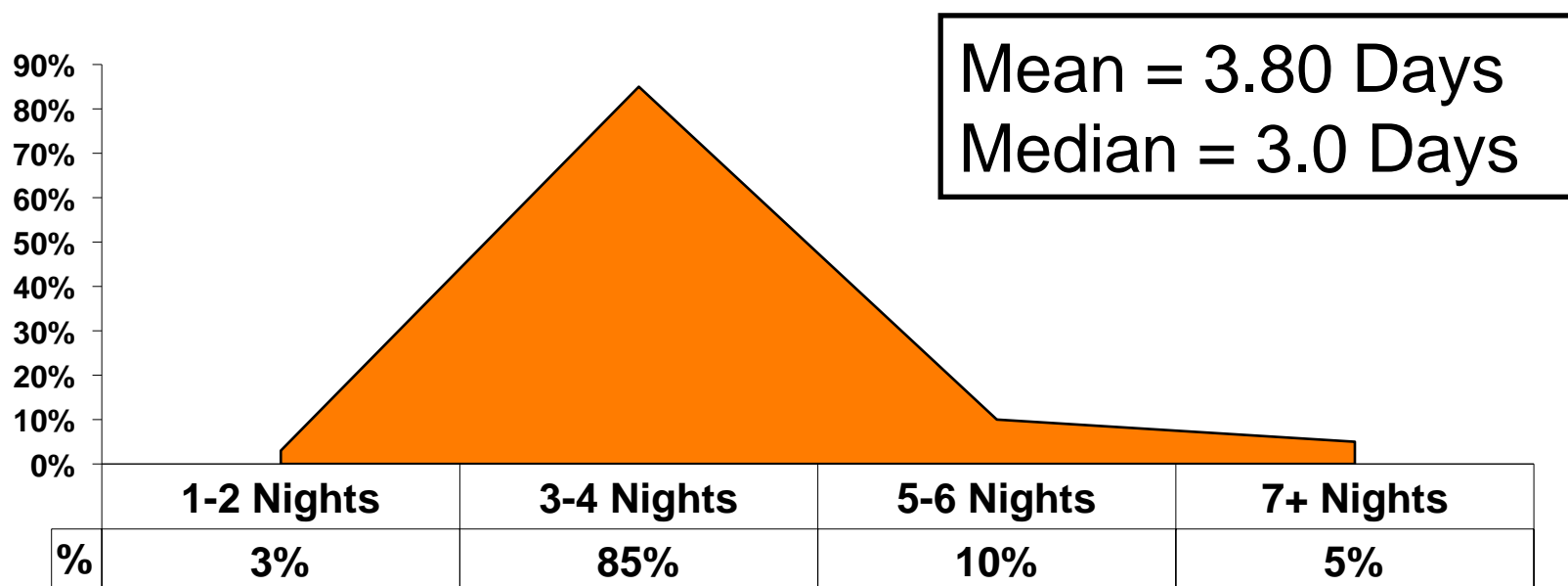


- The average repeat visitor has been to Guam 4.0 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

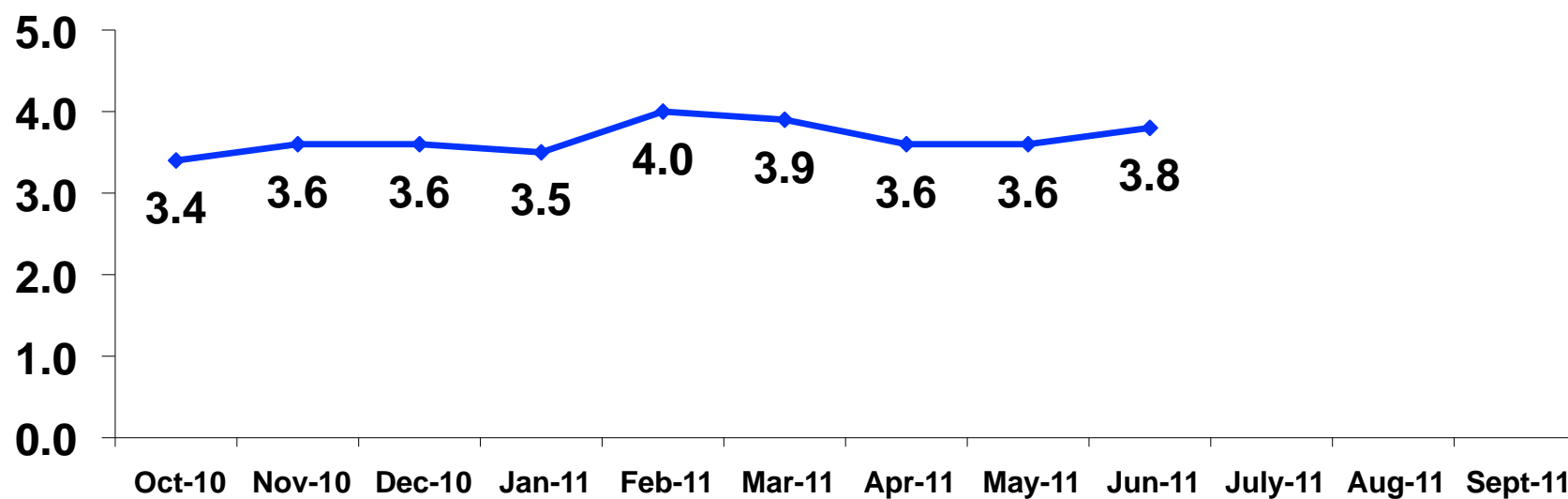
Average Number Overnight Trips (2006-2011) (2 nights or more)



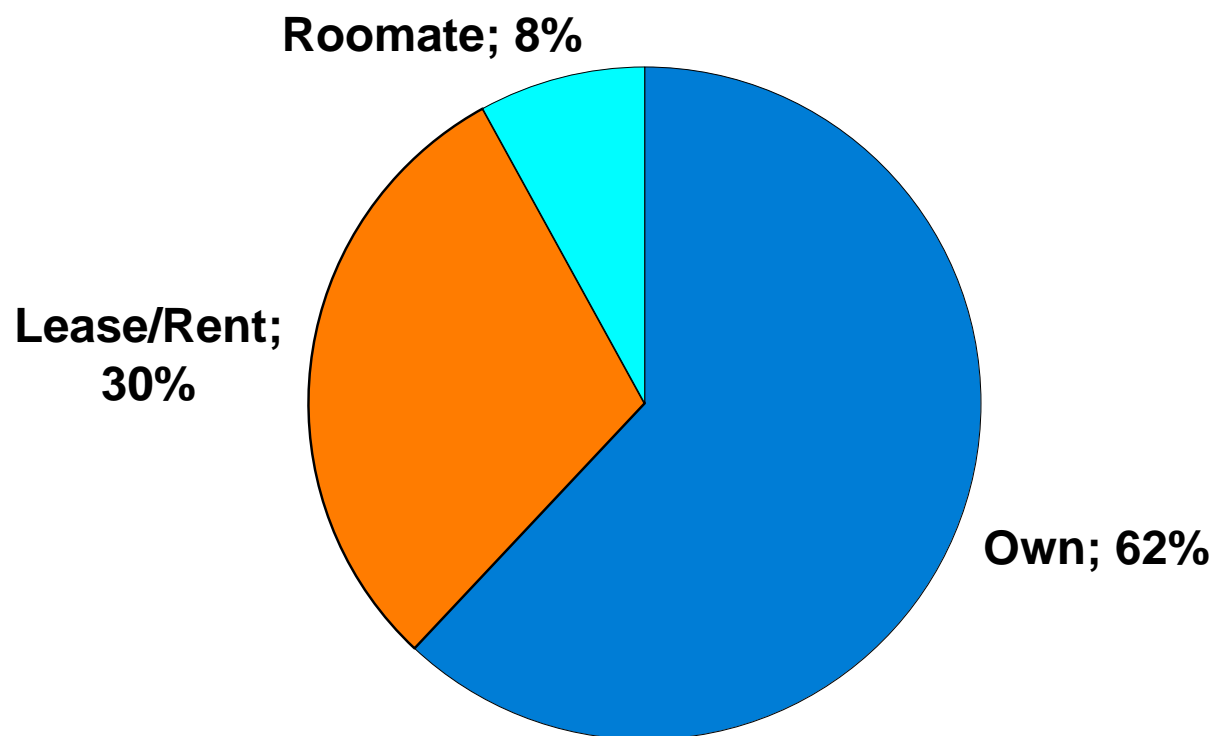
Length of Stay



AVG LENGTH OF STAY



Living Accommodations

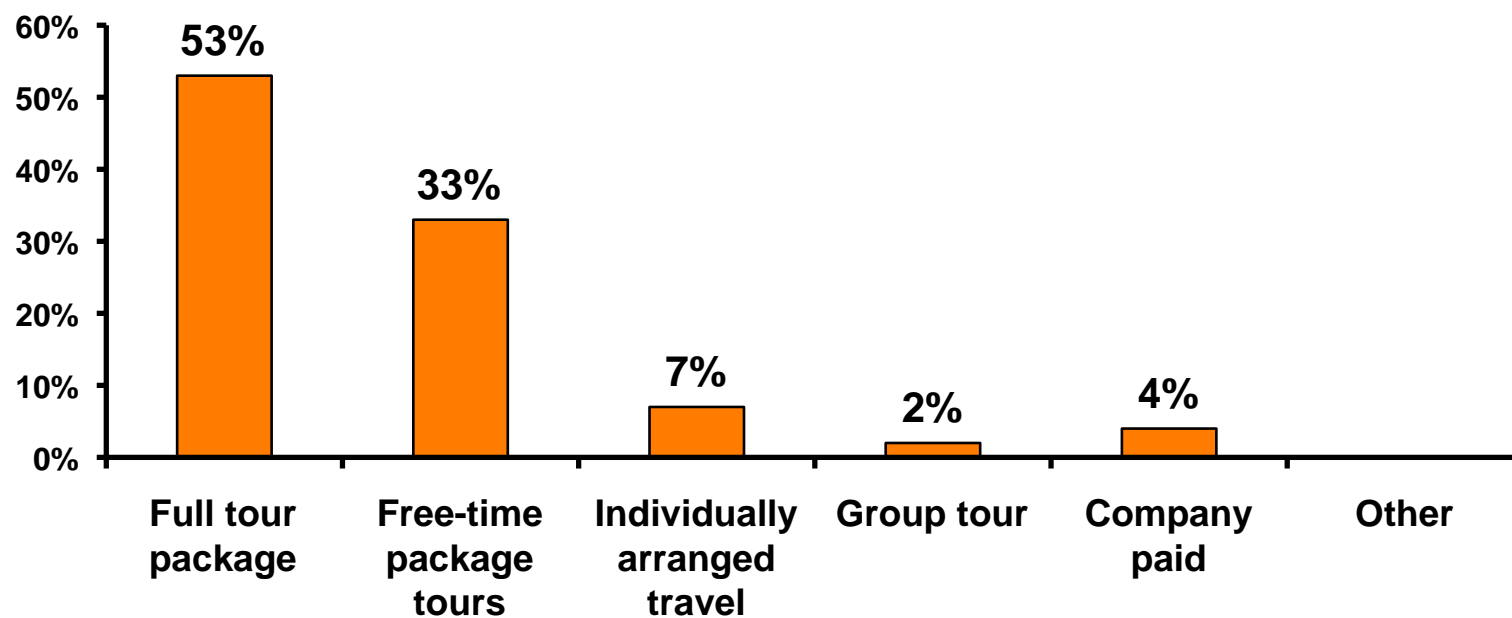


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	32%	29%	30%	35%	35%	100%
	Self-employed	18%	18%	18%	16%	22%	
	Homemaker	13%	9%	13%	15%	11%	
	Prof/Specialist/Tech	10%	9%	7%	9%	16%	
	Service worker	6%	12%	7%	5%	5%	
	Professor/Teacher	4%	3%	5%	2%	4%	
	Manager	3%		2%	5%	4%	
	Unemployed	3%	3%	3%	2%		
	Govt - Office/non-mgr	2%		3%	2%	1%	
	Govt-Mgr	2%		2%	4%		
	Sales/Clerical	1%		3%	2%		
	Free-lancer	1%	3%	4%			
	Govt-Exec	1%	6%	1%		1%	
	Skilled worker	1%	3%	2%	1%		
	Student	1%	3%		2%		
	Other	1%	3%		1%	1%	
	Judicial	1%				1%	
	Farmer	0%		1%			
Total	Count	348	34	110	102	83	4

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

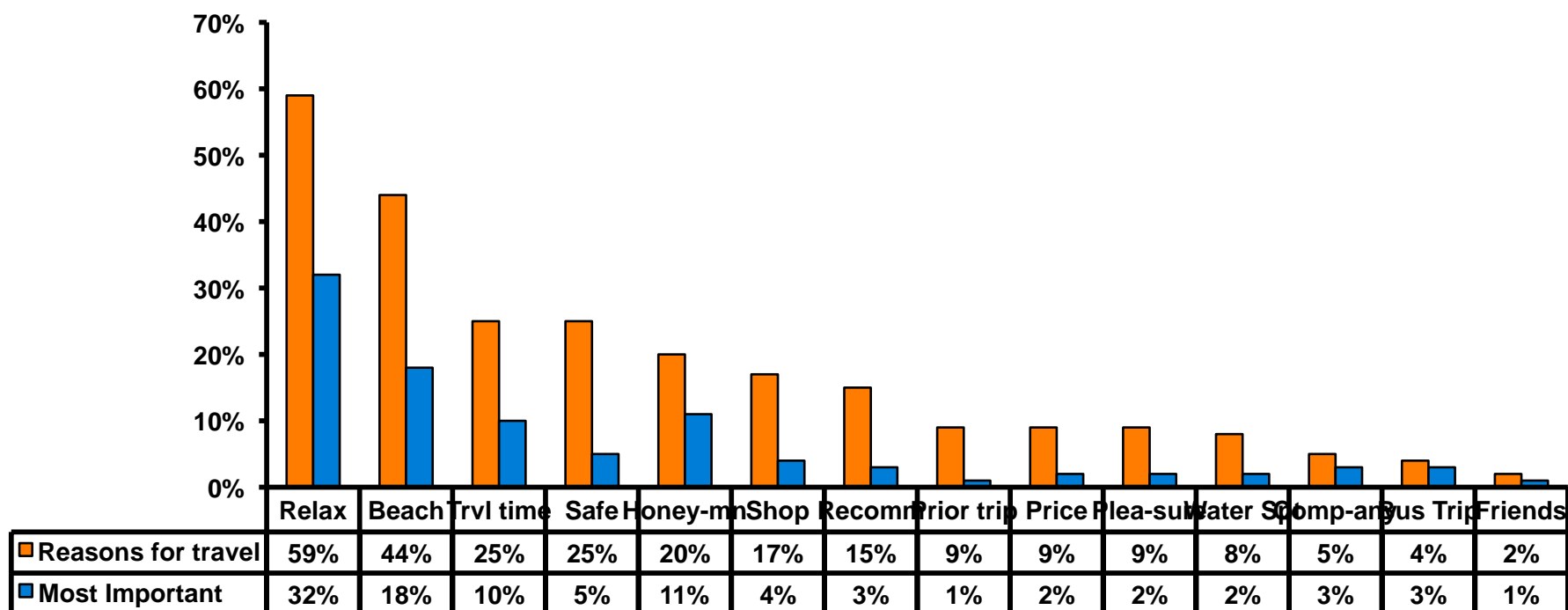


Accommodation by Income

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	58%	63%	50%	60%	63%	50%
	Hyatt Regency Guam	10%	11%	12%	10%	8%	25%
	The Westin Resort Guam	7%	6%	6%	8%	7%	
	Sheraton Laguna Resort	6%		9%	8%	1%	
	Hotel Nikko Guam	5%	3%	6%	5%	6%	
	Onward Beach Resort	4%	6%	3%	4%	5%	25%
	Outrigger Guam Resort	3%	3%	3%	2%	2%	
	Hilton Guam Resort & Spa	2%	3%	3%	1%	1%	
	Relatives, Friends, Home Stay	1%	3%	1%	2%	1%	
	Guam Marriott Resort Hotel	1%		3%	1%		
	Fiesta Resort Guam	1%		2%		1%	
	Hotel Sane Fe	1%	3%	1%		1%	
	Holiday Resort Guam	0%			1%		
	Guam Reef Hotel	0%				1%	
	Japan Plaza Hotel	0%		1%			
	Royal Orchid Guam	0%		1%			
	Ramada Suites Guam	0%				1%	
Total	Count	350	35	108	104	83	4

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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

Motivation by Age & Gender

		TOTAL	AGE					GENDER	
			<20	20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	59%		47%	65%	56%	50%	56%	62%
	Beautiful seas, beaches, tropical climate	44%		40%	41%	52%	90%	41%	46%
	Short travel time	25%	100%	18%	29%	23%		19%	31%
	It is a safe place to spend a vacation	25%		15%	29%	24%	10%	22%	28%
	Honeymoon	20%		45%	16%	9%		21%	19%
	Shopping	17%		27%	18%	6%		14%	21%
	Recommendation of friend, relative, travel agency	15%		11%	19%	9%		10%	20%
	A previous visit	9%		5%	10%	11%	30%	14%	5%
	Price of the tour package	9%		10%	11%	6%		10%	9%
	Pleasure	9%		4%	9%	15%		10%	8%
	Water sports	8%		7%	9%	8%		7%	8%
	My company sponsored me	5%			5%	14%	10%	6%	5%
	Company or Business trip	4%		4%	5%	3%		7%	1%
	To visit friends or relatives	2%			2%	3%	20%	2%	2%
	To golf	2%		1%	1%	8%		3%	1%
	Promotional materials from GVB	2%		1%	2%	6%		3%	2%
	Other	2%			3%	2%	10%	1%	3%
	Special promotion	1%			1%	3%		1%	2%
	Organized Sporting Activity	1%			2%	2%		1%	1%
	Career certification or testing	1%		1%	1%	2%		1%	1%
	SCUBA diving	1%		1%	1%			1%	
Total	Cases	349	1	73	199	66	10	176	173

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	59%	40%	52%	63%	70%	75%
	Beautiful seas, beaches, tropical climate	44%	37%	37%	48%	52%	25%
	Short travel time	25%	11%	24%	24%	30%	50%
	It is a safe place to spend a vacation	25%	17%	23%	29%	23%	
	Honeymoon	20%	31%	32%	19%	4%	
	Shopping	17%	23%	17%	17%	16%	25%
	Recommendation of friend, relative, travel agency	15%	6%	14%	13%	23%	25%
	Price of the tour package	9%	6%	8%	12%	10%	25%
	A previous visit	9%	9%	8%	6%	16%	
	Pleasure	9%	6%	5%	13%	11%	
	Water sports	8%	6%	6%	10%	7%	
	My company sponsored me	5%	6%	5%	9%	4%	
	Company or Business trip	4%	11%	5%	2%	5%	
	To visit friends or relatives	2%	3%	3%	2%	2%	
	Promotional materials from GVB	2%		2%	5%	1%	
	To golf	2%		1%	2%	5%	
	Other	2%	6%	1%	1%	2%	
	Special promotion	1%	3%	2%	1%		
	Organized Sporting Activity	1%			2%	2%	
	Career certification or testing	1%		1%	2%		
SCUBA diving	1%			2%			
Total	Cases	349	35	109	104	82	4

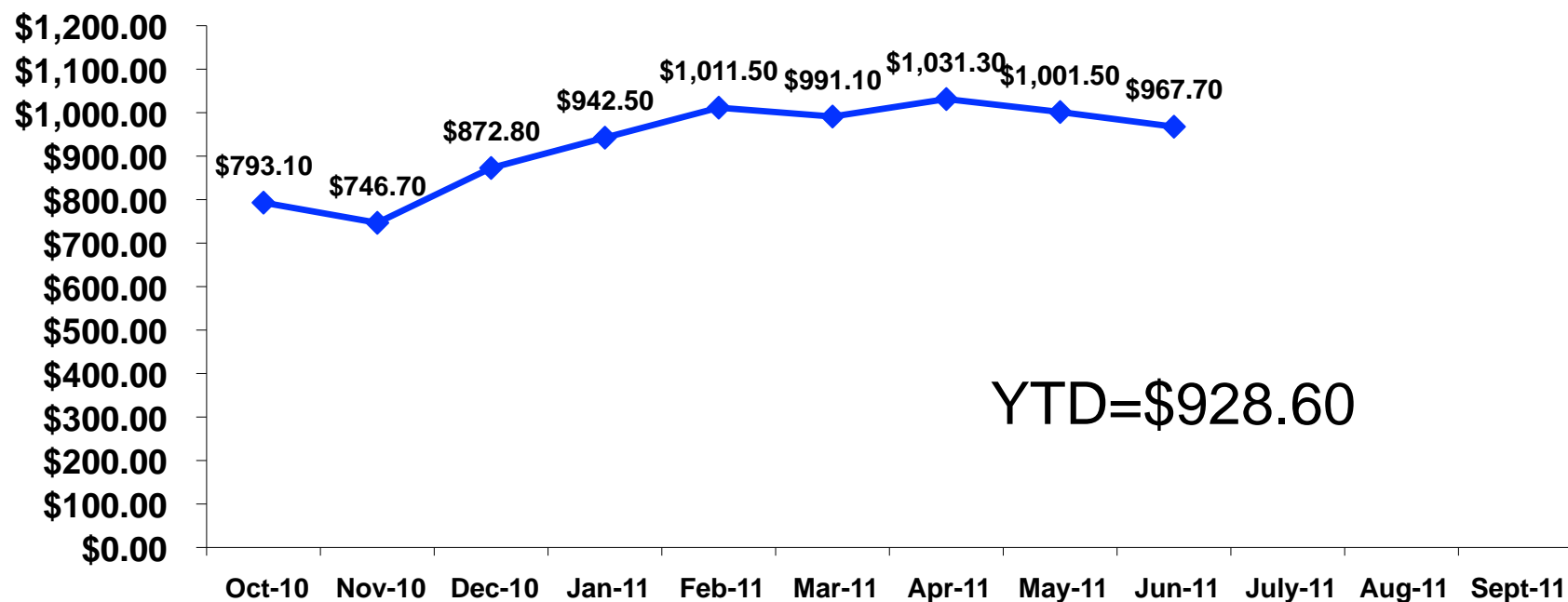
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1081.94/US\$1

- \$2,381.80 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,712 = maximum (highest amount recorded for the entire sample)
- \$967.70 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES



Breakdown of Prepaid Expenditures

KW1081.94=\$1

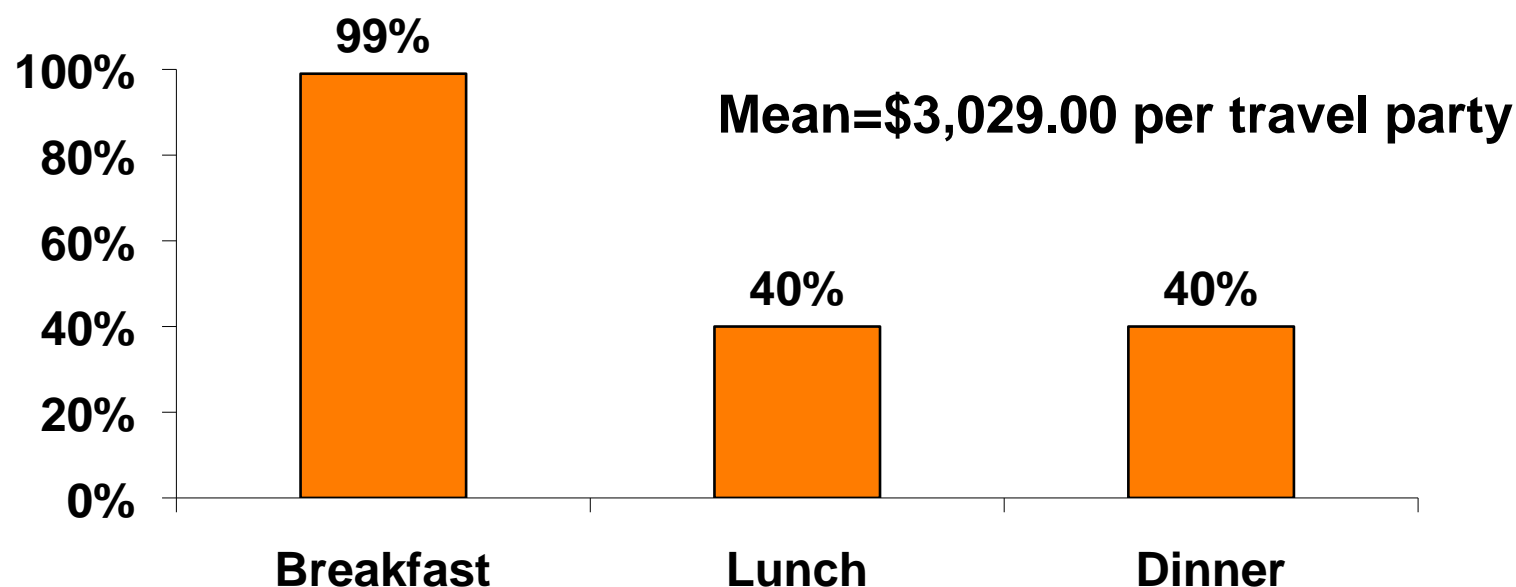
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,123.00
Air & Accommodation w/ daily meal package	\$3,029.00
Air only	\$607.80
Accommodation only	\$462.10
Accommodation w/ daily meal only	\$1,250.50
Food & Beverages in Hotel	\$220.20
Ground transportation – Korea	\$119.40
Ground transportation – Guam	\$150.70
Optional tours/ activities	\$351.00
Other expenses	\$614.30
Total Prepaid	\$2,381.80

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

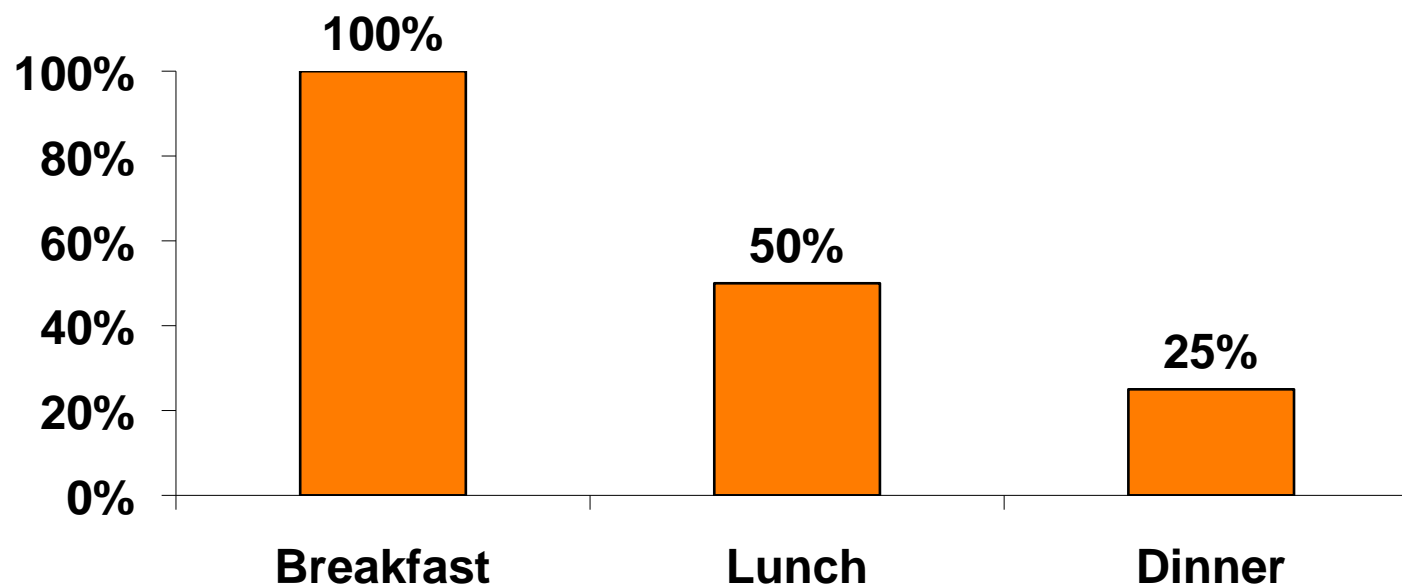
n=201



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

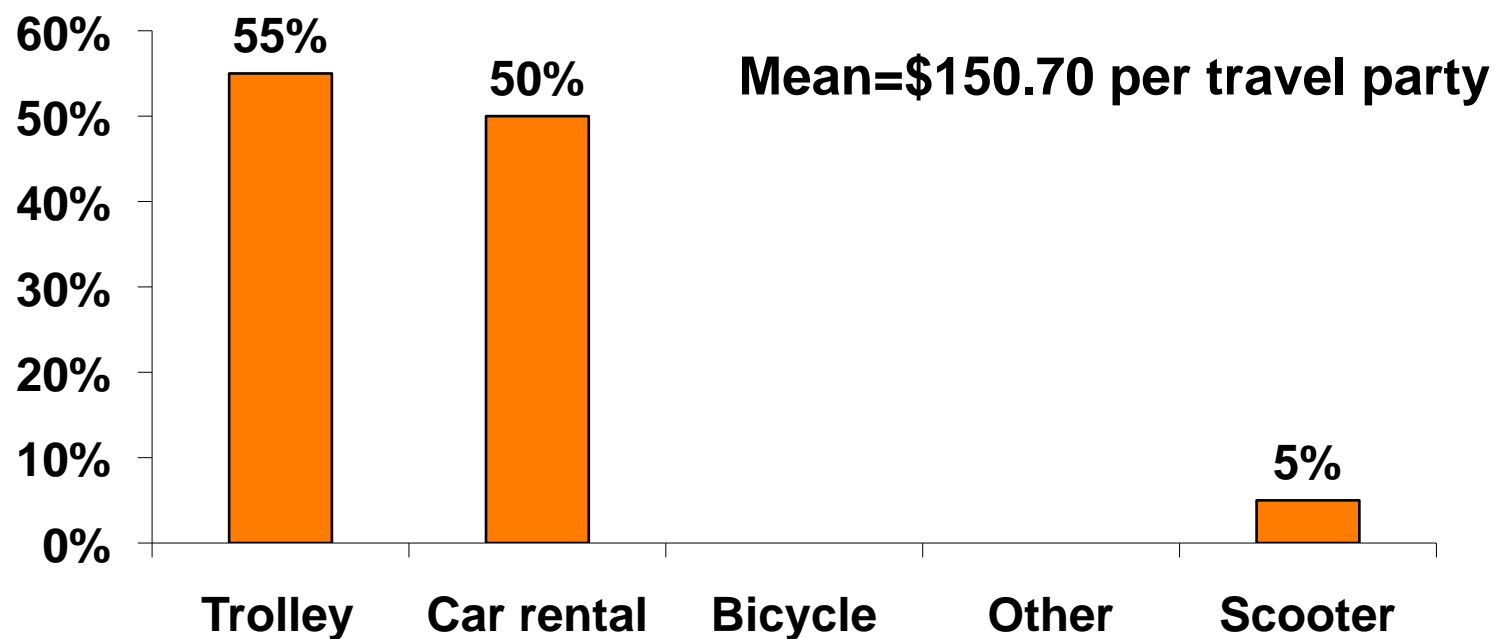
n= 4



Mean= \$1,250.50 per travel party

PREPAID GROUND TRANSPORTATION

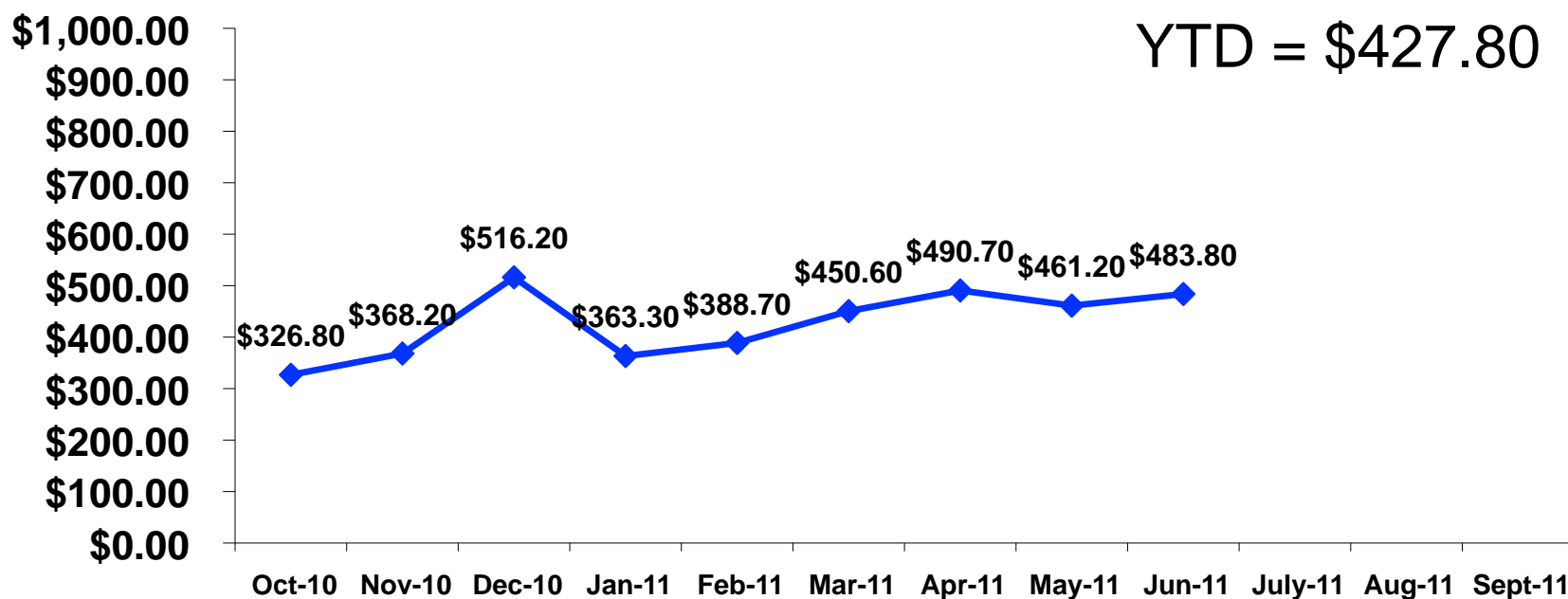
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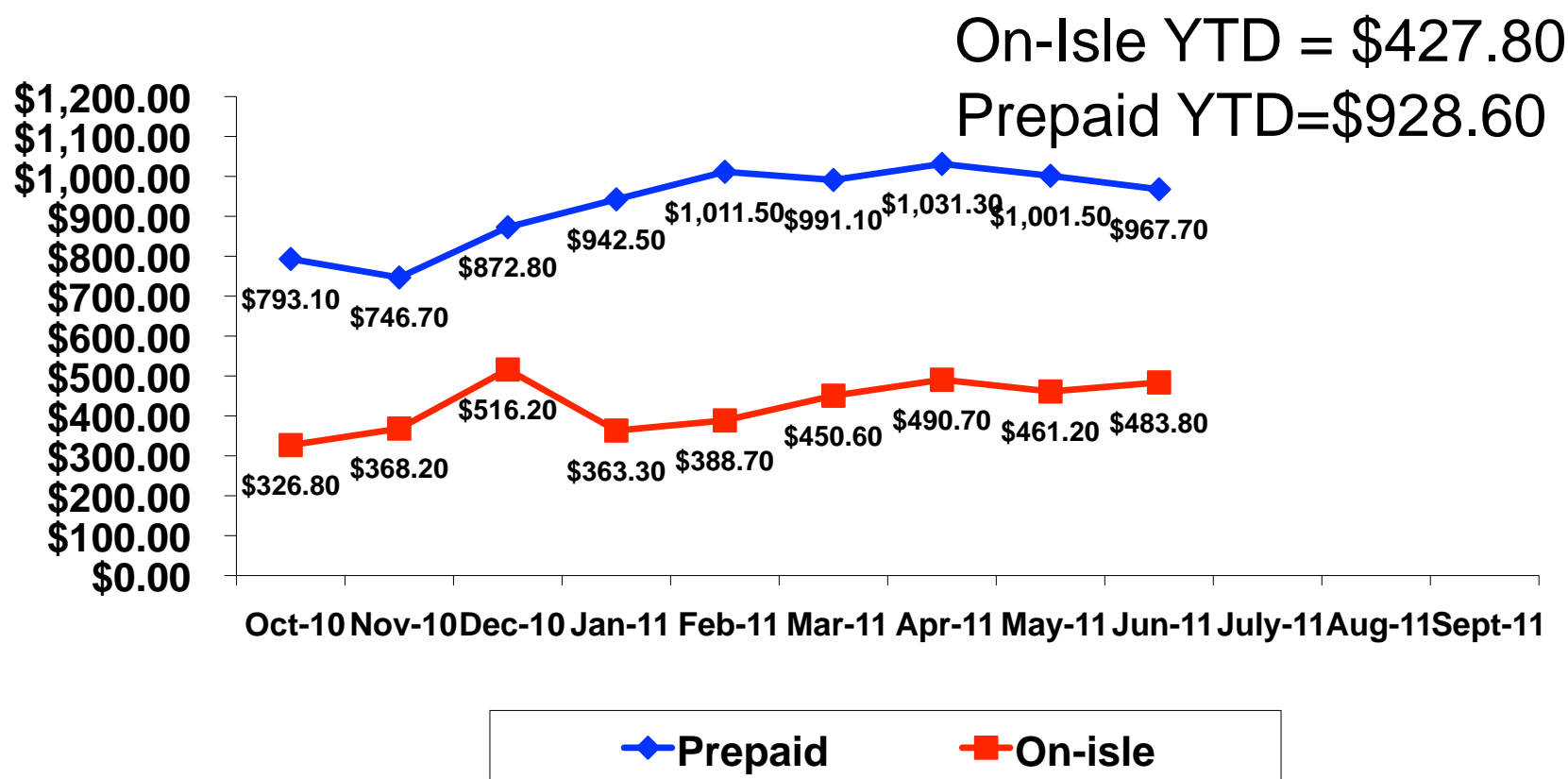
On-Island Expenditures

- \$1,023.90 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$9,000 = Maximum (highest amount recorded for the entire sample)
- \$483.80 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES



PREPAID/ ON-ISLE EXPENDITURES



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
					Male					Female			
					AGE					AGE			
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$1,023.87	\$974.98	\$1,072.76	\$110.00	\$992.31	\$976.17	\$988.42	\$940.00	\$1,054.40	\$1,167.38	\$713.42	\$1,000.00
	Median	\$680	\$620	\$700	\$110	\$700	\$646	\$600	\$560	\$700	\$800	\$500	\$1,000

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$41.93	\$46.35	\$37.52	\$0.00	\$28.09	\$50.51	\$30.60	\$53.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$34.41	\$38.41	\$30.41	\$0.00	\$35.77	\$30.18	\$28.43	\$152.50
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$40.68	\$42.02	\$39.34	\$0.00	\$38.68	\$41.41	\$47.39	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$88.73	\$91.47	\$85.99	\$0.00	\$115.34	\$86.90	\$71.48	\$53.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$257.81	\$215.00	\$300.62	\$0.00	\$278.89	\$275.15	\$217.61	\$50.00
	Median	\$0	\$0	\$0	\$0	\$0	\$50	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$159.01	\$145.28	\$172.73	\$0.00	\$187.97	\$153.57	\$135.04	\$230.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$21.11	\$22.69	\$19.52	\$0.00	\$21.01	\$20.36	\$26.91	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$370.16	\$353.73	\$386.51	\$110.00	\$300.89	\$406.52	\$334.54	\$413.50
	Median	\$20	\$5	\$50	\$110	\$10	\$50	\$50	\$0
TOTAL ON ISLAND	Mean	\$1,023.87	\$974.98	\$1,072.76	\$110.00	\$1,032.58	\$1,073.69	\$889.91	\$952.00
	Median	\$680	\$620	\$700	\$110	\$700	\$700	\$500	\$560

On-Island Expenditures

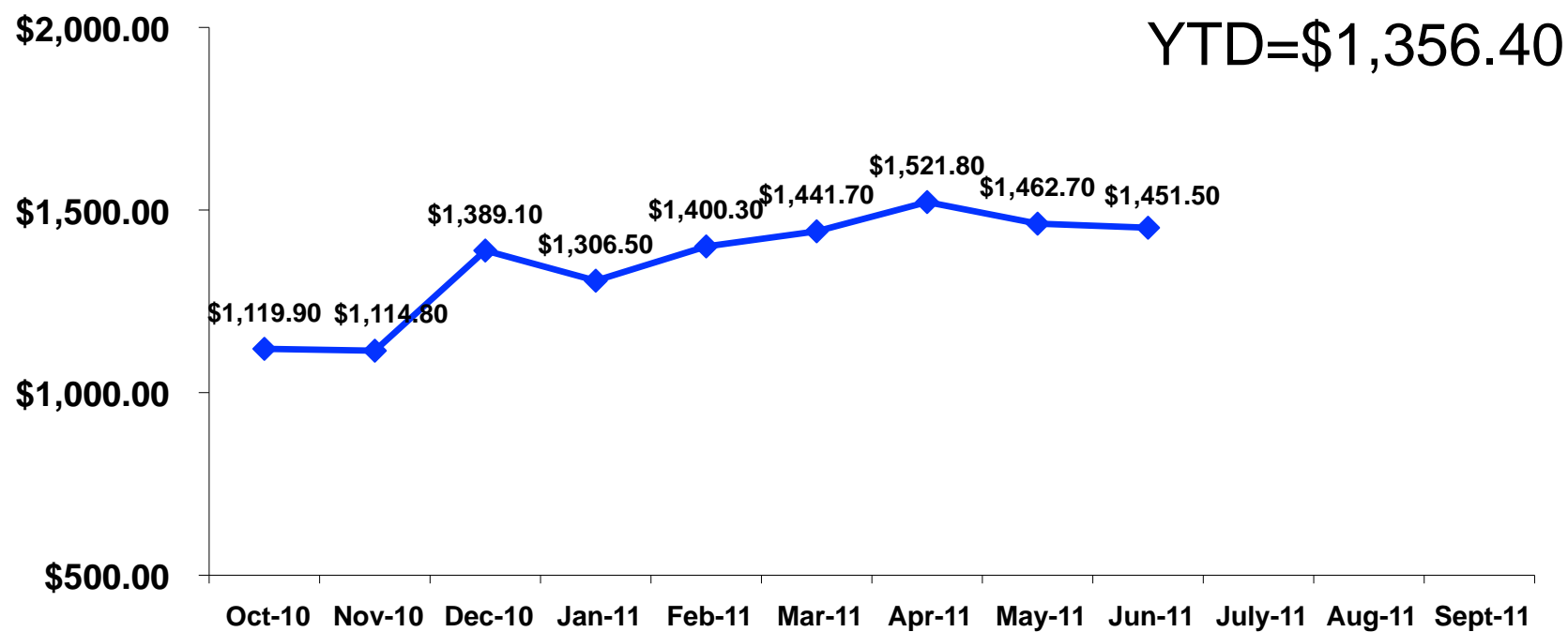
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$41.13	\$45.56
	Median	\$0	\$0
F&B-FF	Mean	\$30.55	\$49.59
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$32.37	\$72.88
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$98.48	\$52.81
TOUR	Median	\$0	\$0
GIFT/	Mean	\$275.10	\$195.48
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$167.40	\$129.25
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$17.62	\$34.64
	Median	\$0	\$0
OTHER EXP	Mean	\$336.27	\$503.84
	Median	\$40	\$0
TOTAL ON	Mean	\$1,005.64	\$1,107.33
ISLAND	Median	\$690	\$650

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,451.50 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,932 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES

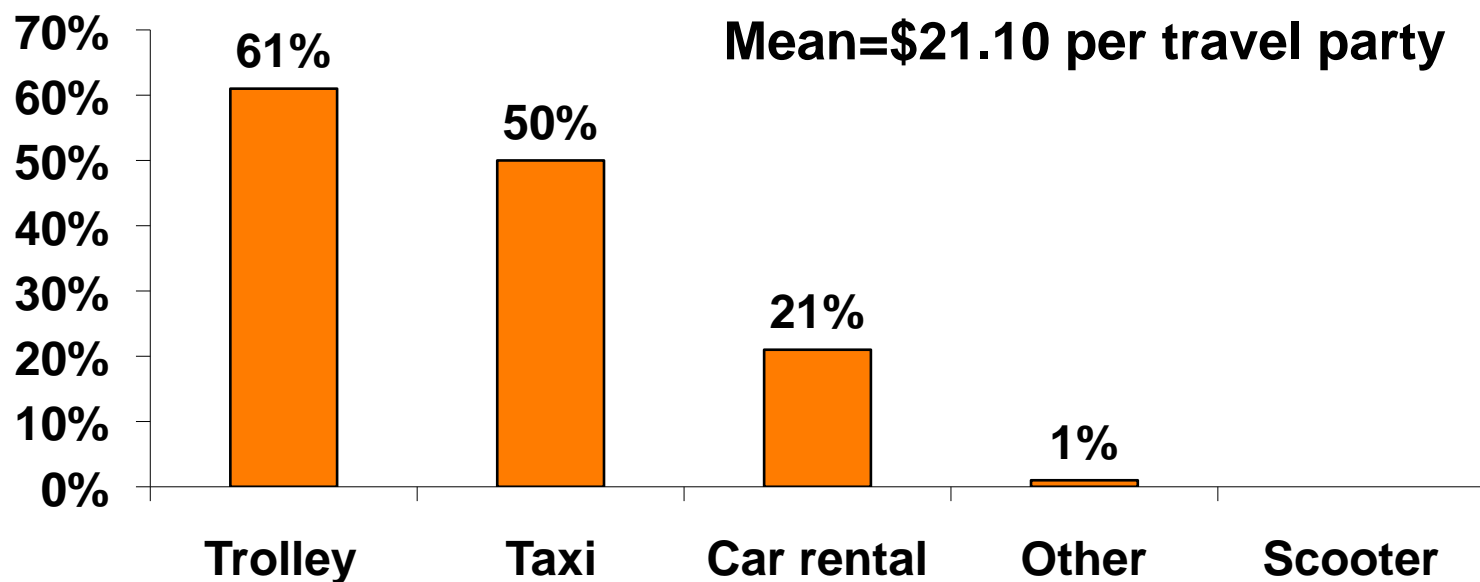


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$41.90
Food & beverage in fast food restaurant/ convenience store	\$34.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$40.70
Optional tours and activities	\$88.70
Gifts/ souvenirs for yourself/companions	\$257.80
Gifts/ souvenirs for friends/family at home	\$159.00
Local transportation	\$21.10
Other expenses not covered	\$370.20
Average Total	\$1,023.90

Local Transportation

n=101



Guam Airport Expenditures

- \$91.20 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$3,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

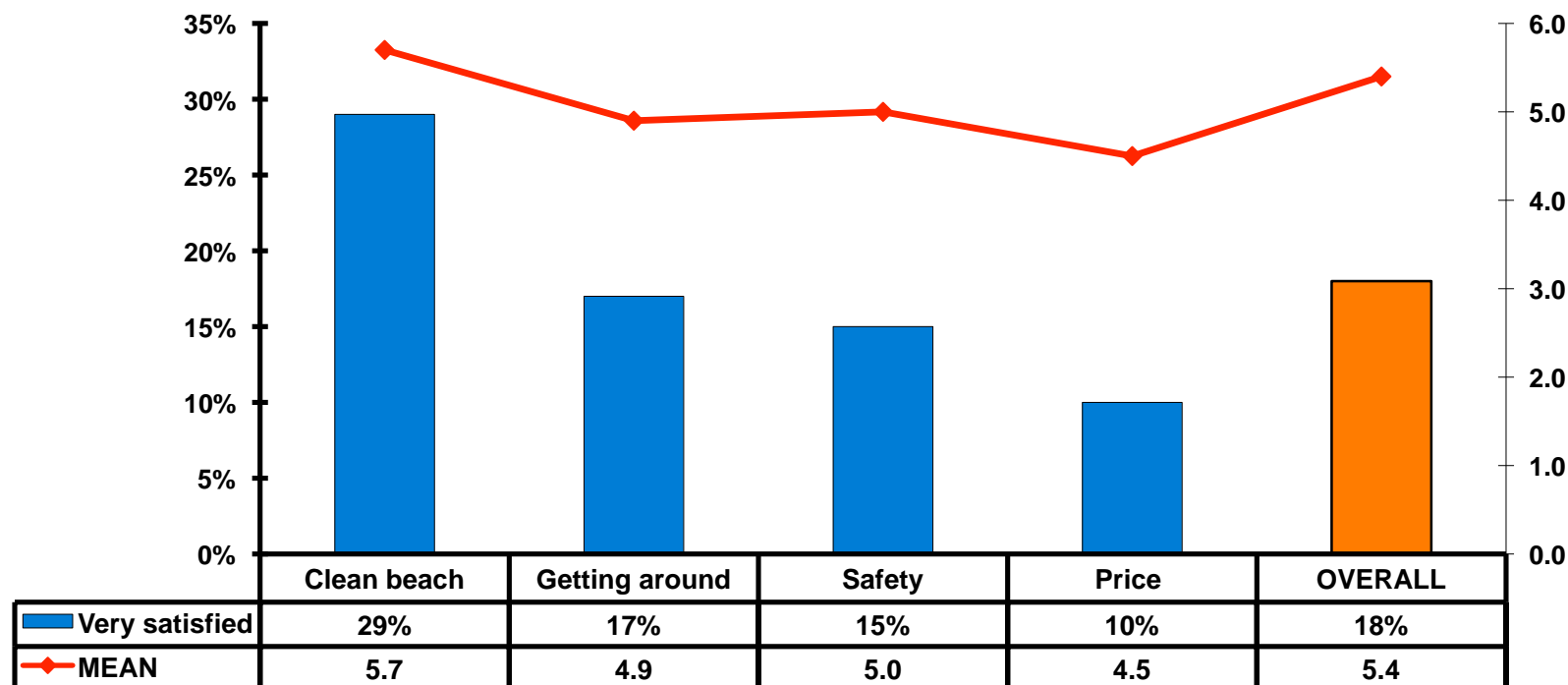
	MEAN \$
Food & Beverages	\$7.80
Gifts/Souvenirs Self	\$43.00
Gifts/Souvenirs Others	\$40.50
Total	\$91.20

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

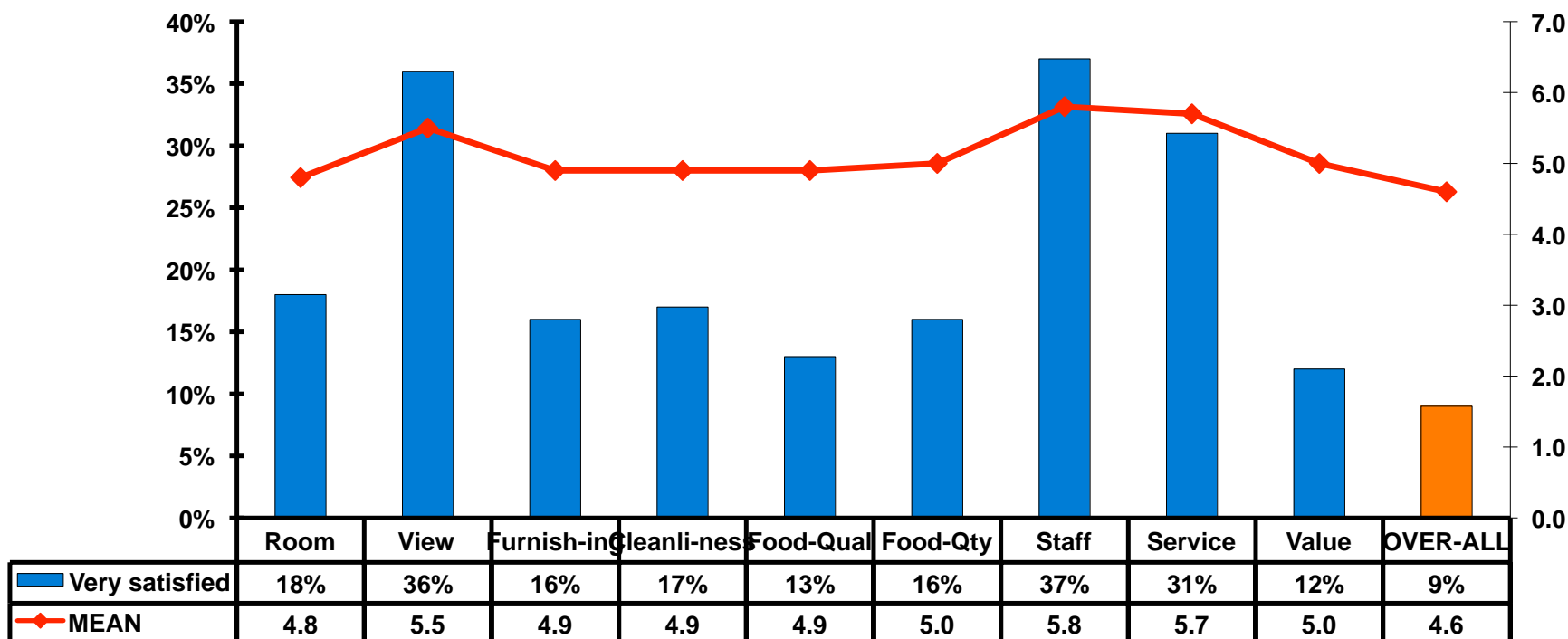
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

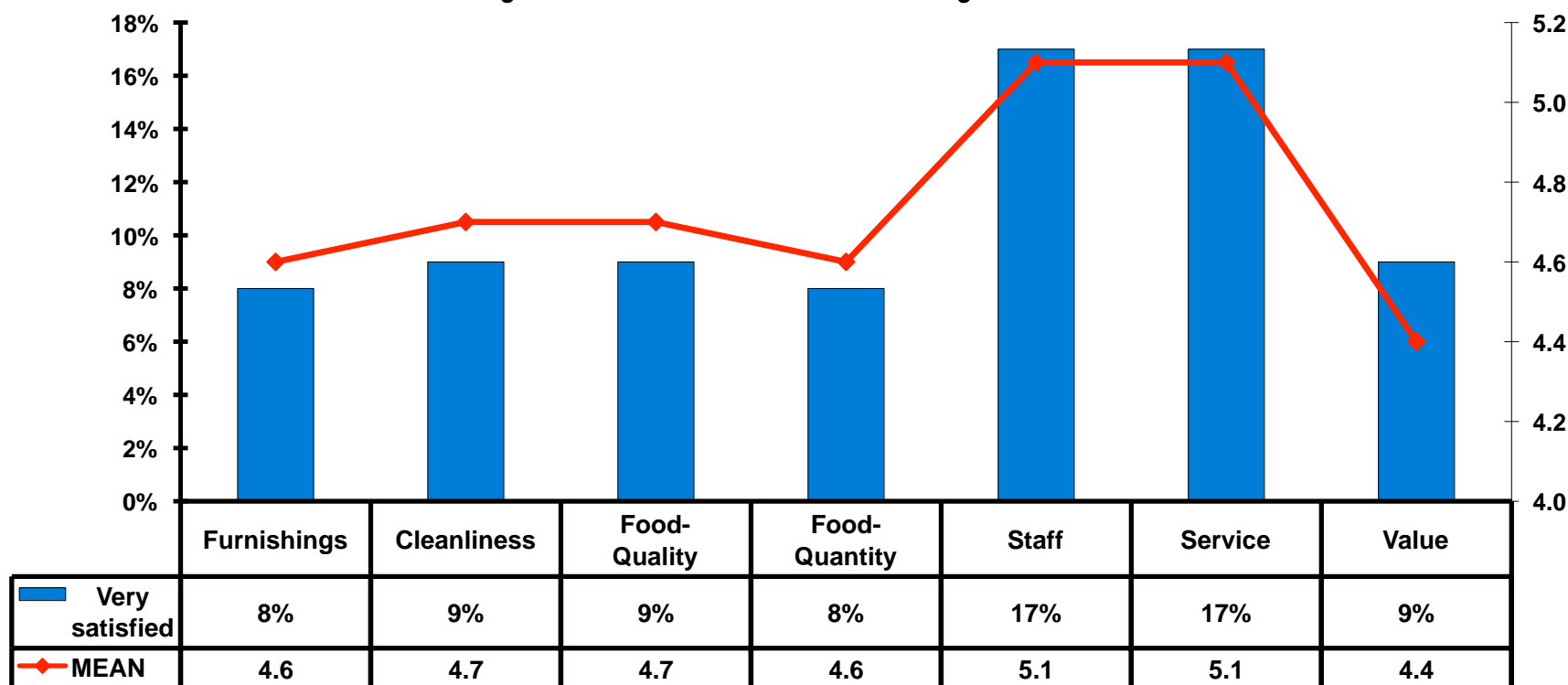
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

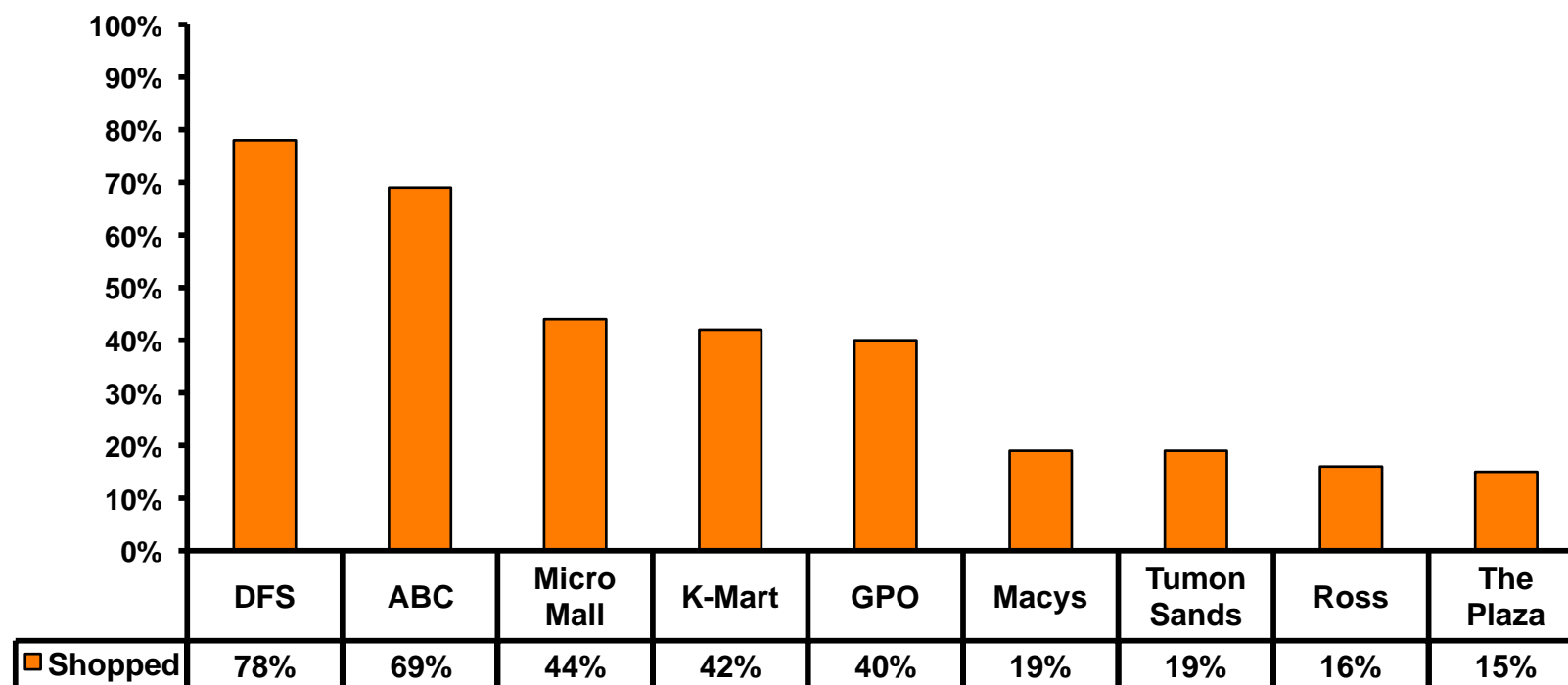
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

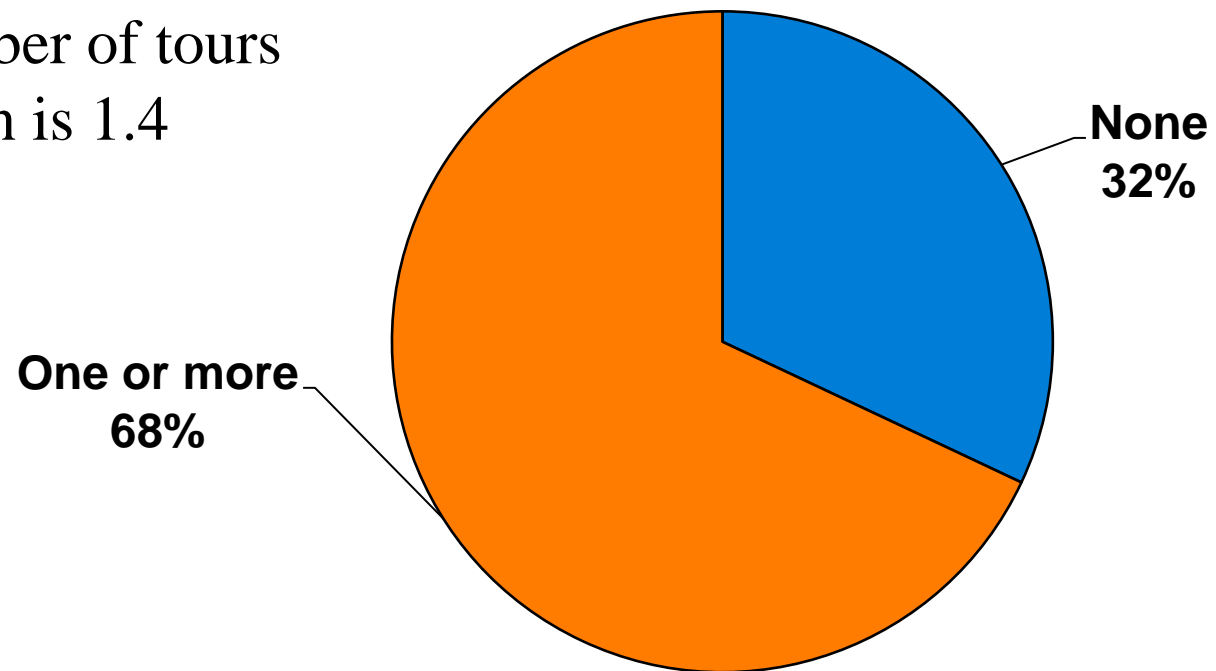
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 48%	Score of 6 to 7 = 44%
Score of 4 to 5 = 45%	Score of 4 to 5 = 45%
Score 1 to 3 = 7%	Score 1 to 3 = 12%
MEAN = 5.3	MEAN = 5.1

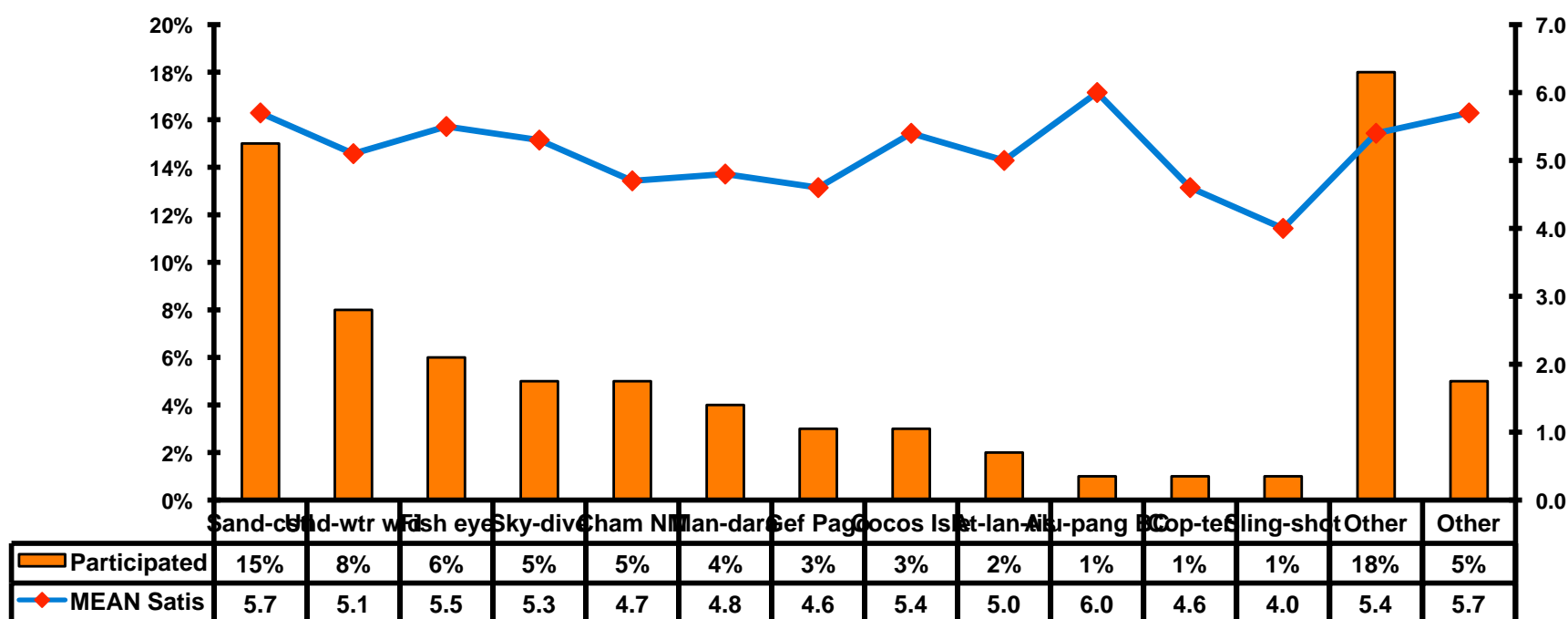
Optional Tour Participation

- 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 = 39%	Score of 6 to 7 = 33%
Score of 4 to 5 = 49%	Score of 4 to 5 = 52%
Score 1 to 3 = 11%	Score 1 to 3 = 15%
MEAN = 5.0	MEAN = 4.8

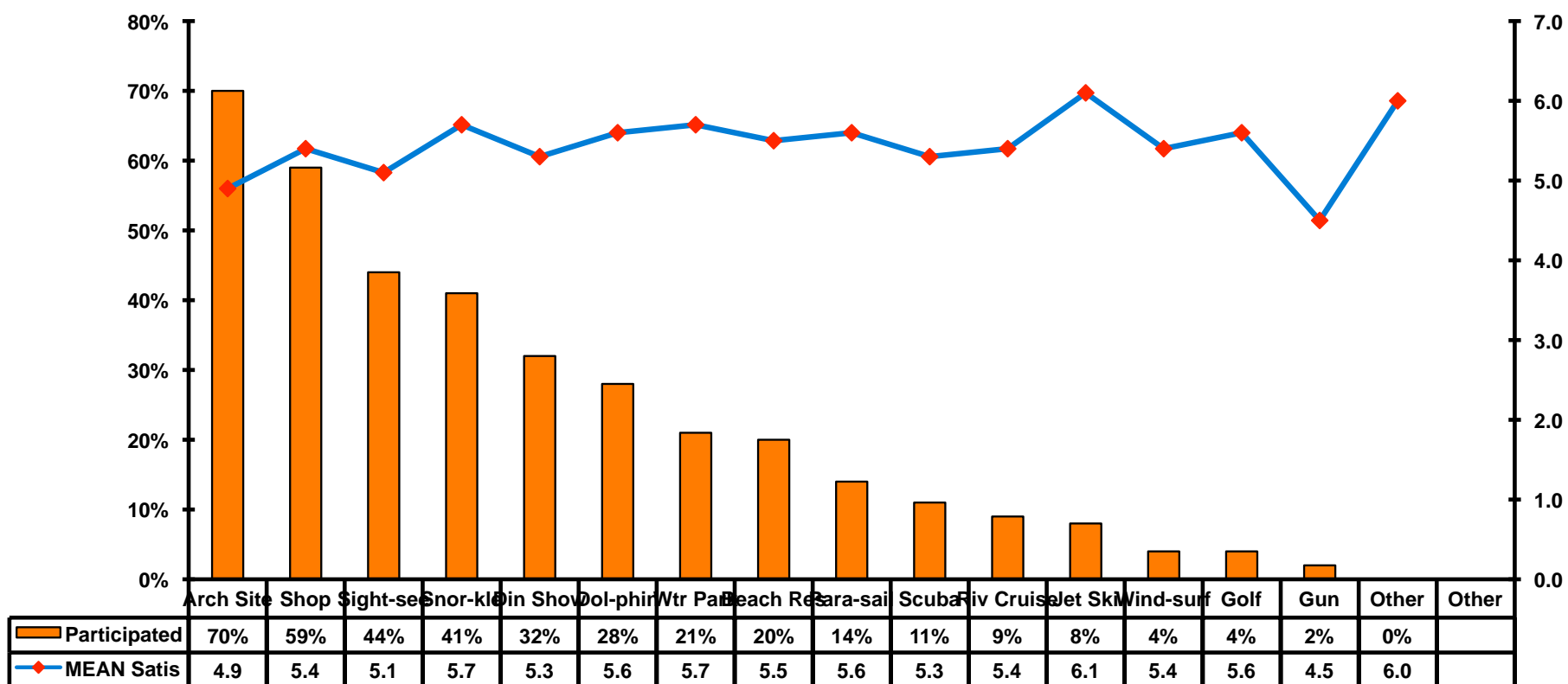
Night Tours Satisfaction

7pt Rating Scale

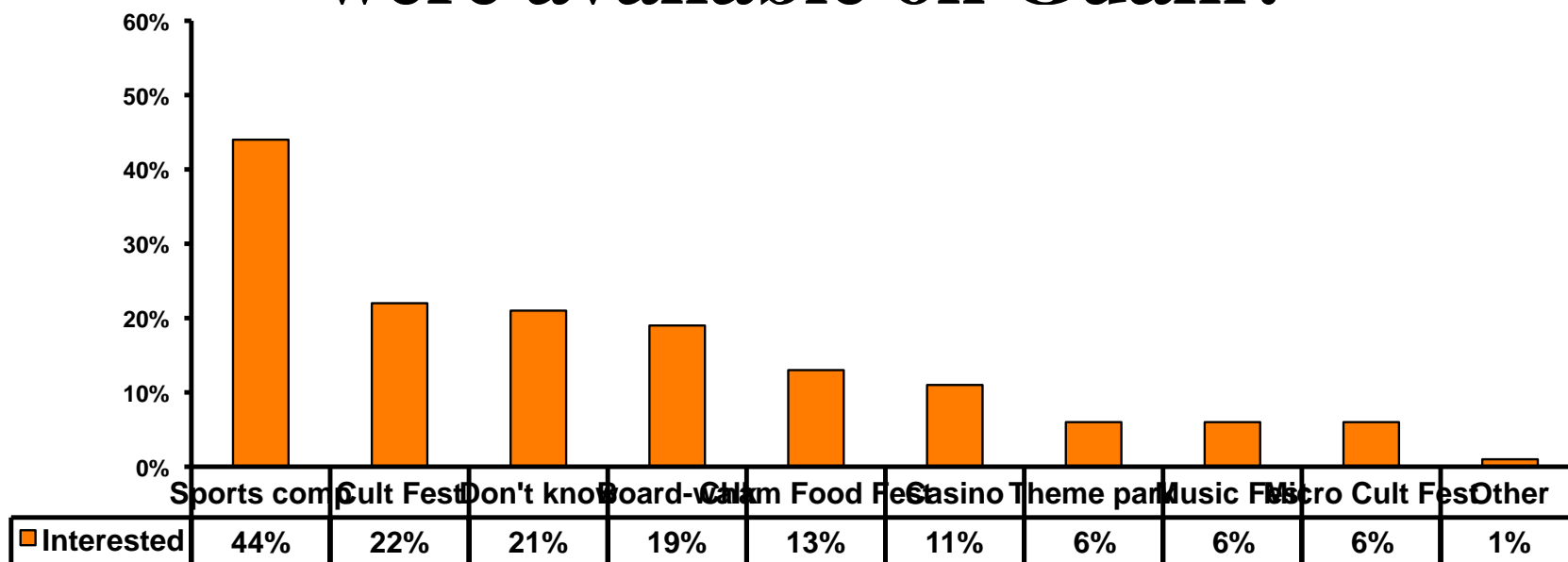
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 26%	Score of 6 to 7 = 23%
Score of 4 to 5 = 56%	Score of 4 to 5 = 56%
Score 1 to 3 = 18%	Score 1 to 3 = 22%
MEAN = 4.5	MEAN = 4.4

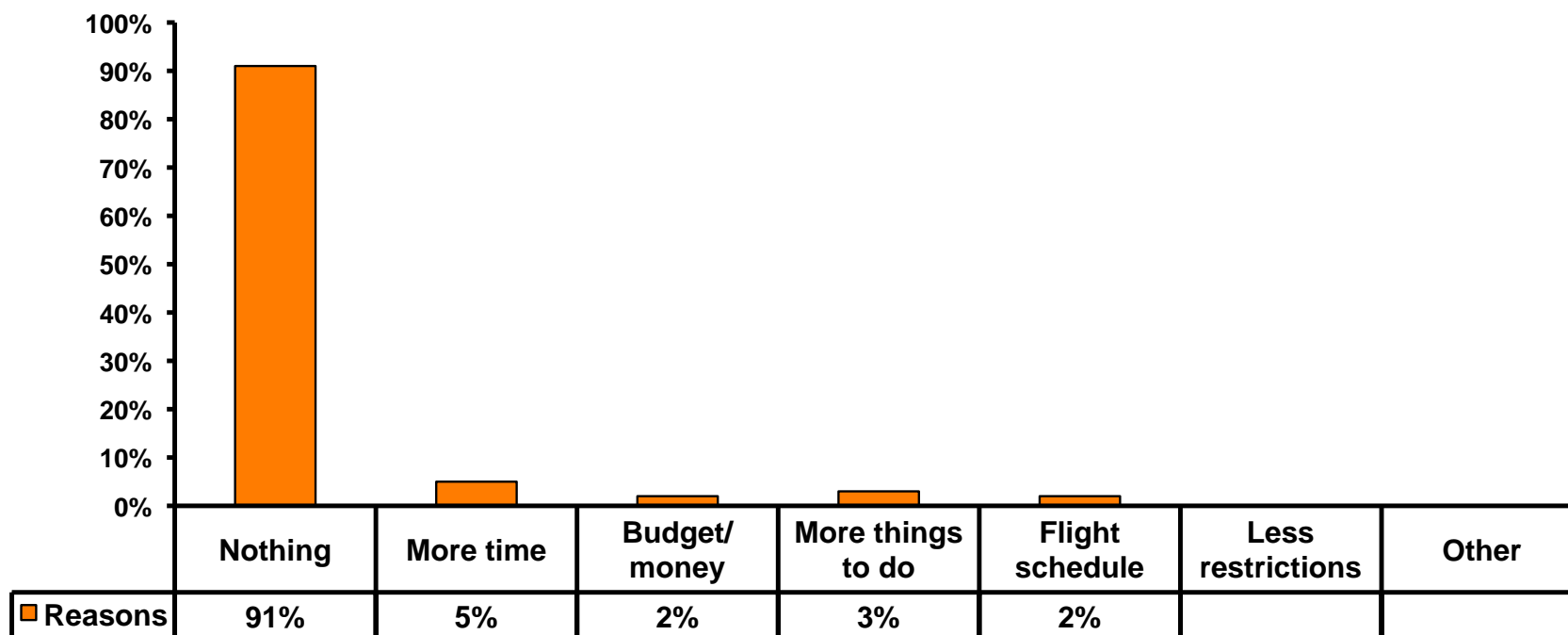
Satisfaction with Other Activities



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



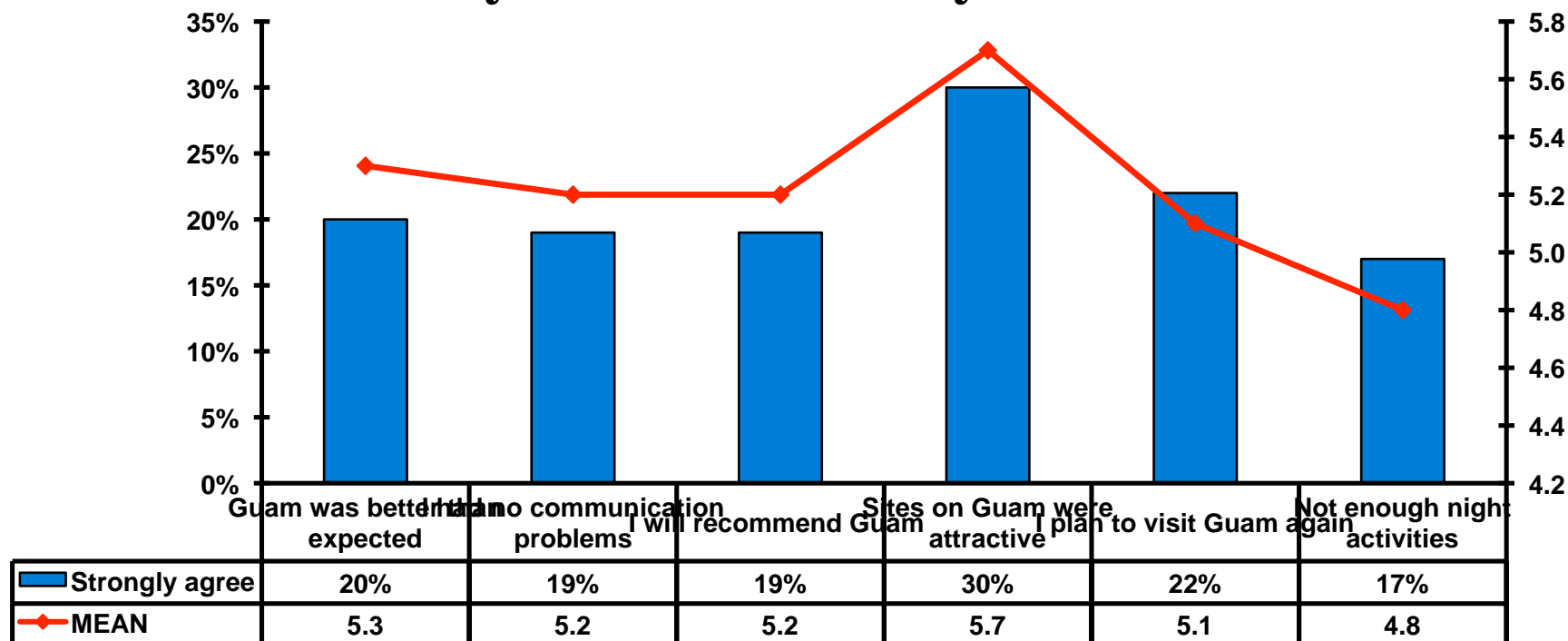
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

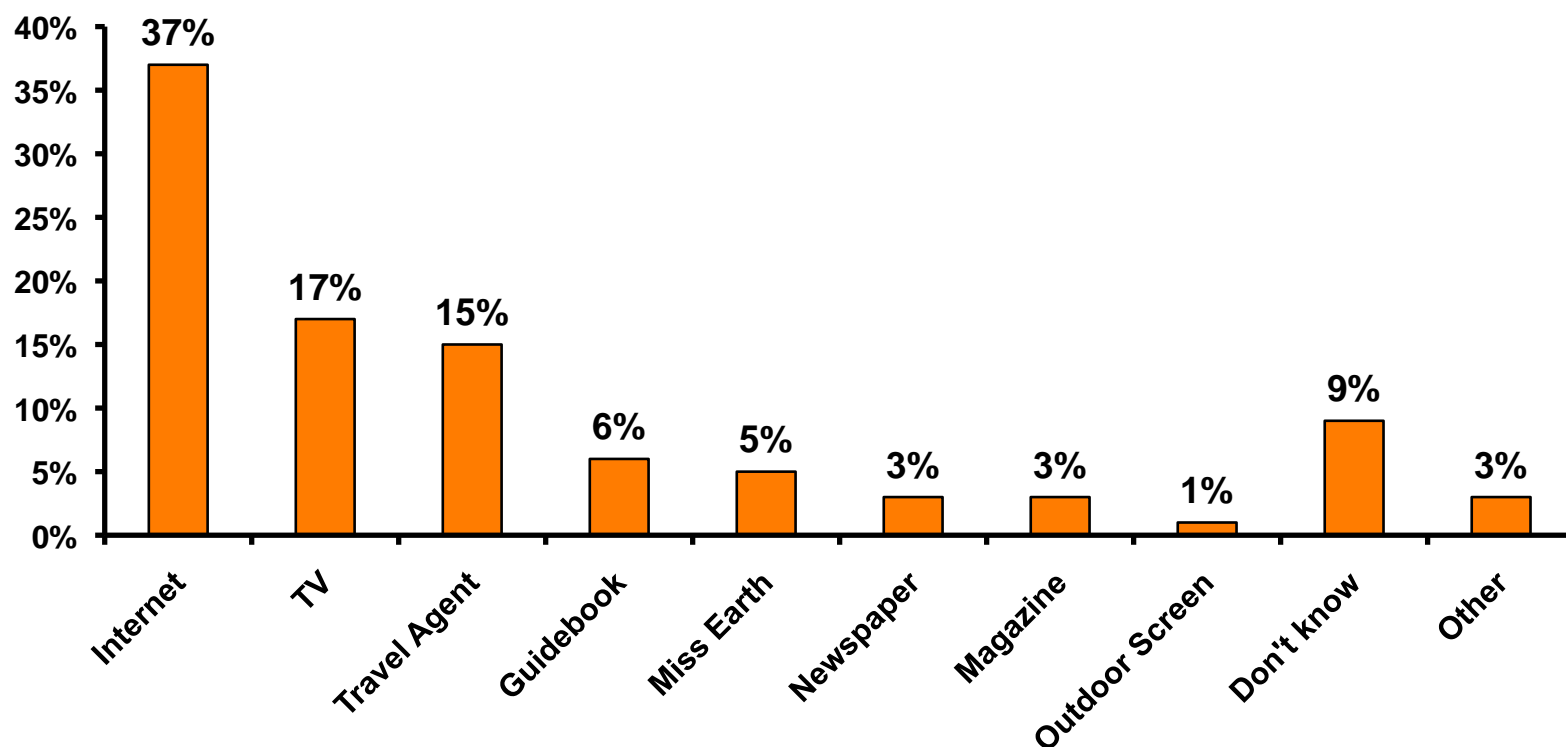
7=Very Satisfied/ 1=Very Dissatisfied



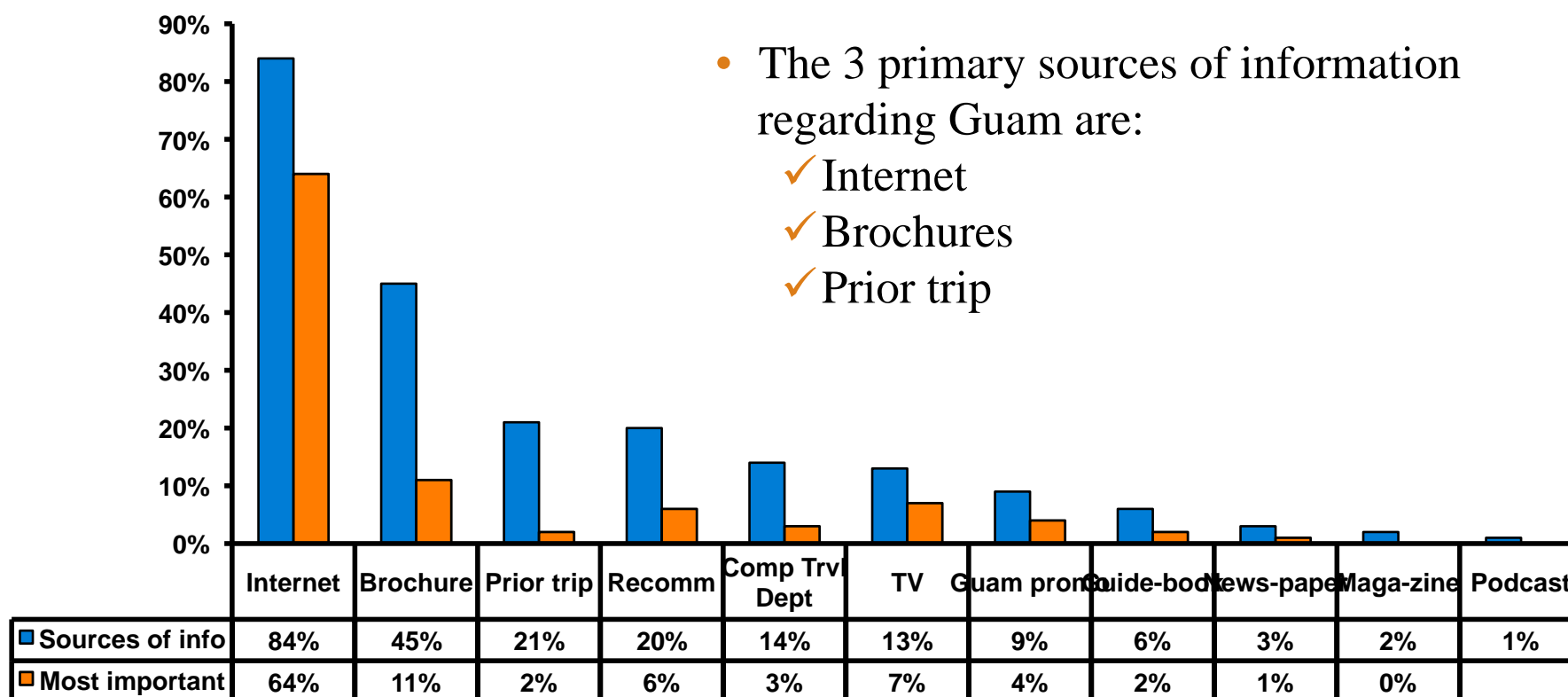
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

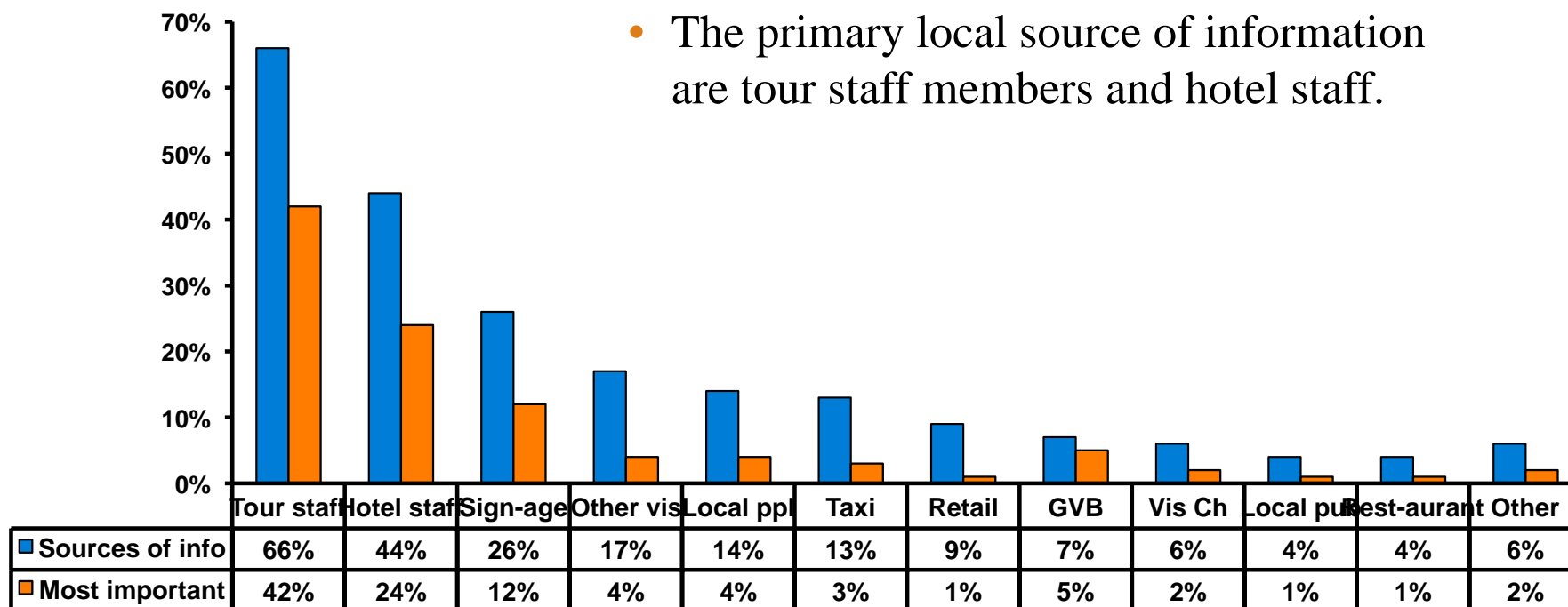


Sources of Information Pre-arrival



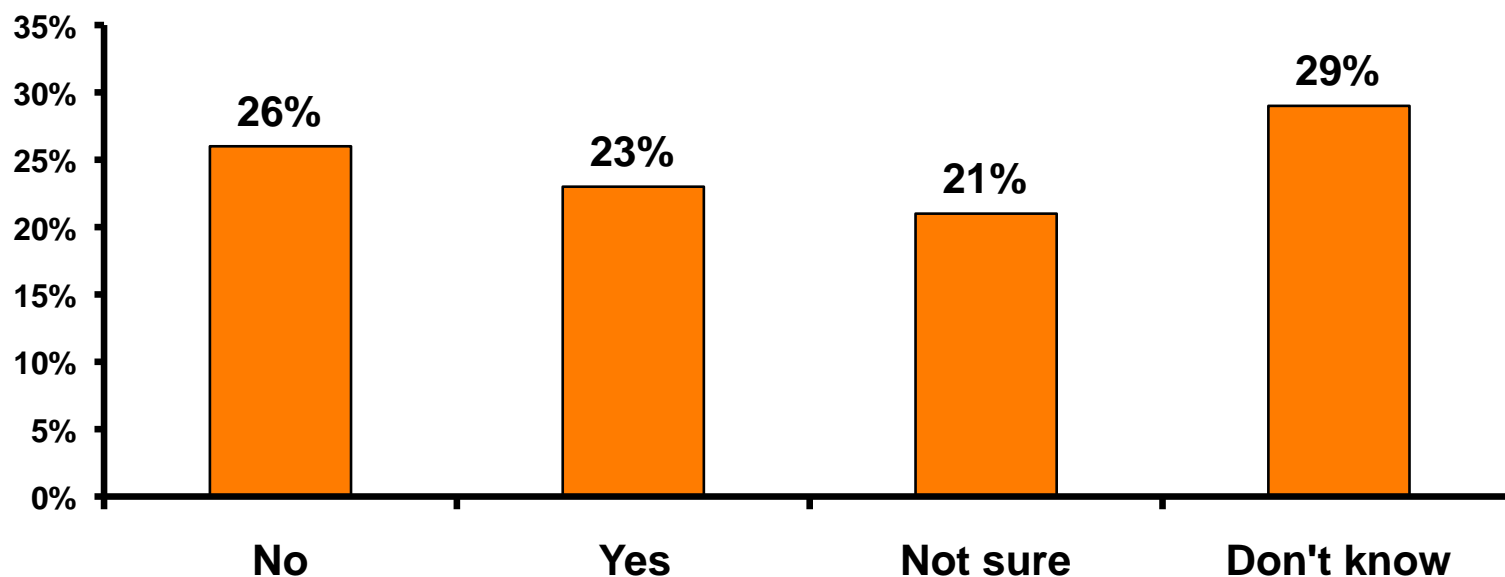
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

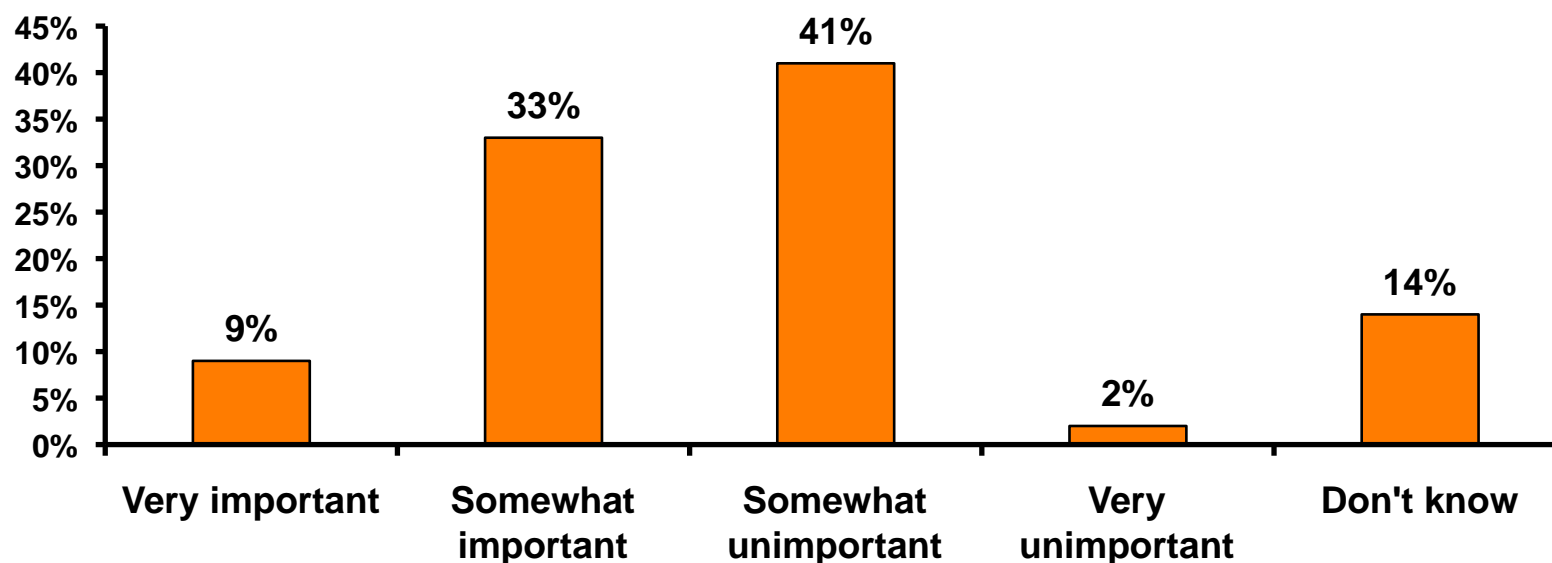
Good time to spend money on travel outside of Korea - Overall



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		26%	29%	22%	20%	37%	29%	24%	22%	
	Yes		22%	25%	19%	40%	9%	21%	23%	34%	25%
	Not sure	100%	19%	21%	25%	20%	11%	18%	27%	22%	75%
	Do not know		34%	27%	33%	20%	43%	32%	26%	23%	
Total	Count	1	74	200	67	10	35	110	104	83	4

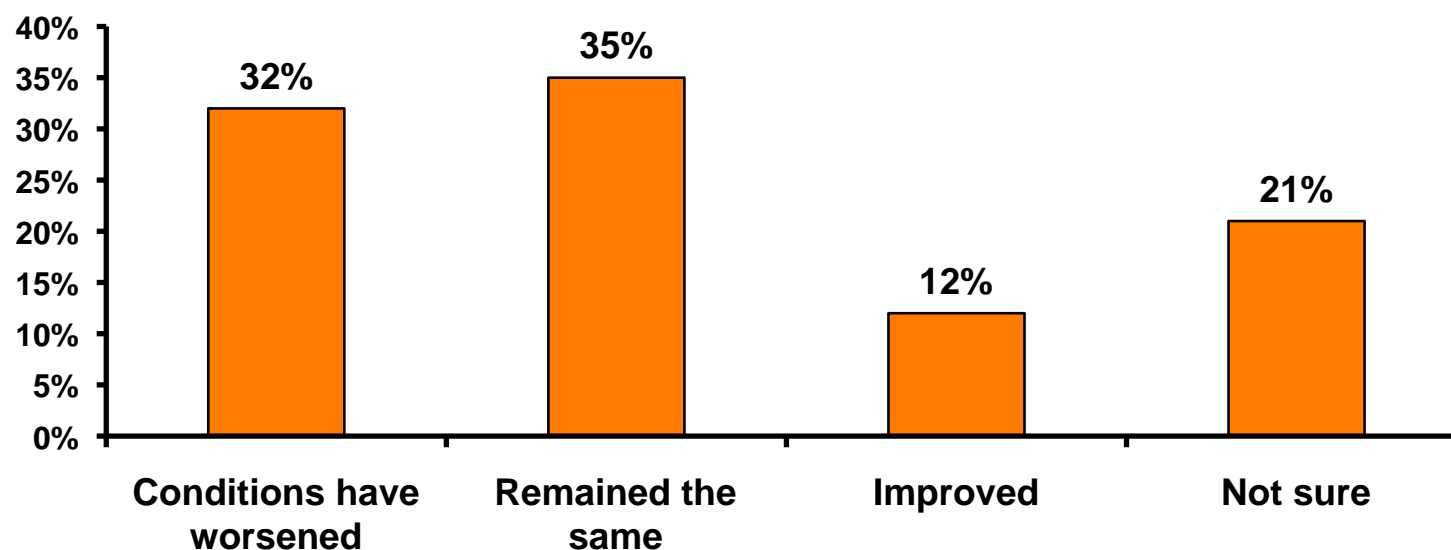
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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%	2%	4%			3%	3%	2%	
	Somewhat unimportant	100%	34%	44%	42%	40%	31%	35%	44%	52%	25%
	Somewhat important		34%	33%	34%	40%	31%	35%	36%	29%	25%
	Very important		12%	9%	3%	20%	14%	10%	6%	7%	25%
	Don't know		18%	13%	16%		23%	17%	12%	10%	25%
Total	Count	1	74	200	67	10	35	110	104	83	4

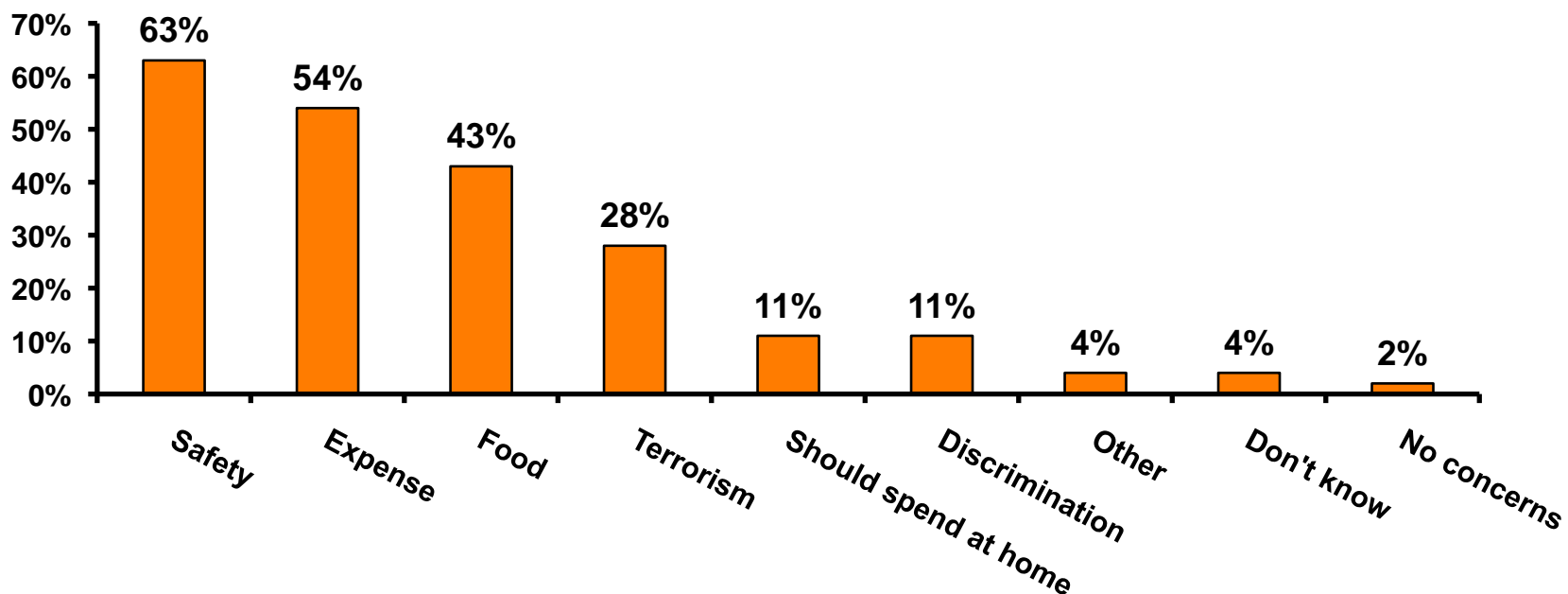
Rating Korean Economy Compared to 12 months ago



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		27%	32%	36%	30%	29%	34%	28%	33%	75%
	Conditions have remained the same	100%	22%	38%	39%	40%	24%	34%	35%	45%	
	Conditions have improved		15%	12%	10%	10%	6%	14%	18%	8%	
	Do not know		36%	18%	15%	20%	41%	18%	19%	14%	25%
Total	Count	1	73	199	67	10	34	109	104	83	4

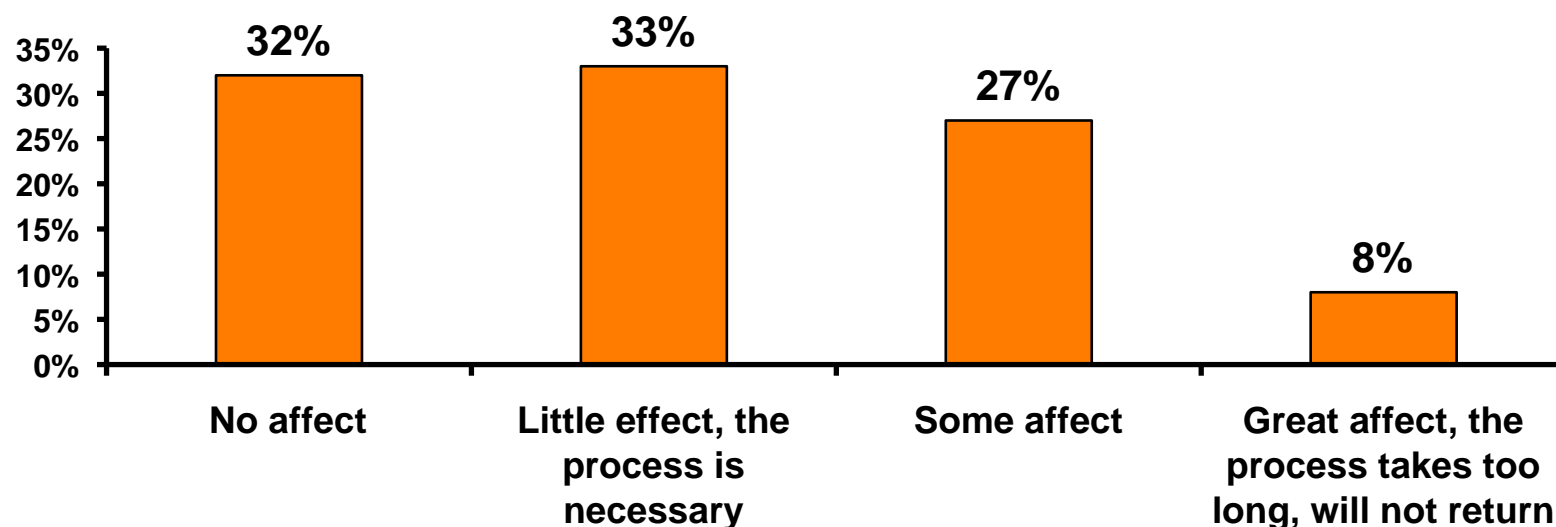
Concerns about travel outside of Korea - Overall



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%	67%	63%	50%	43%	65%	72%	60%	
	Expense		57%	57%	43%	40%	49%	58%	54%	48%	50%
	Food	100%	49%	44%	34%	30%	46%	40%	48%	41%	50%
	Terrorism		28%	33%	13%	30%	23%	25%	35%	23%	
	Spending money abroad when it should be spent at home		16%	10%	10%	10%	14%	15%	8%	7%	25%
	Other	100%	4%	3%	4%			4%	3%	7%	
	Do not know		7%	2%	4%	10%	9%	3%	3%	1%	25%
	No concerns		1%	2%	4%			1%	4%	4%	
Total	Cases	1	74	200	67	10	35	110	104	83	4

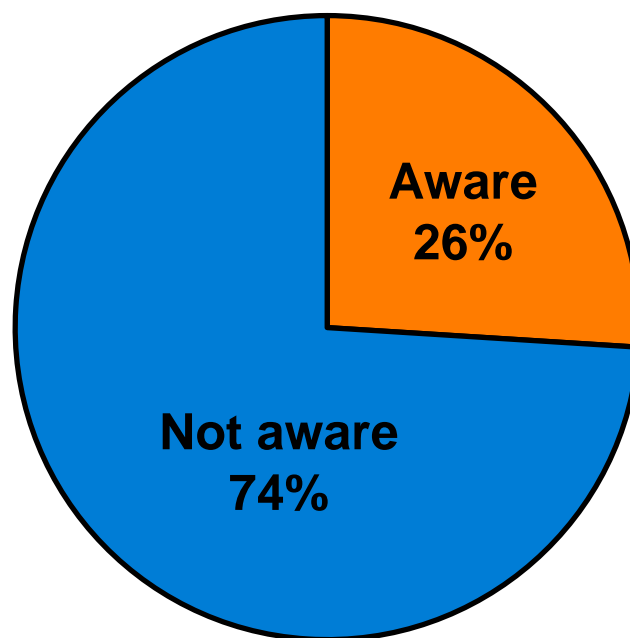
Security Screening/ Immigration Process at Guam International Airport



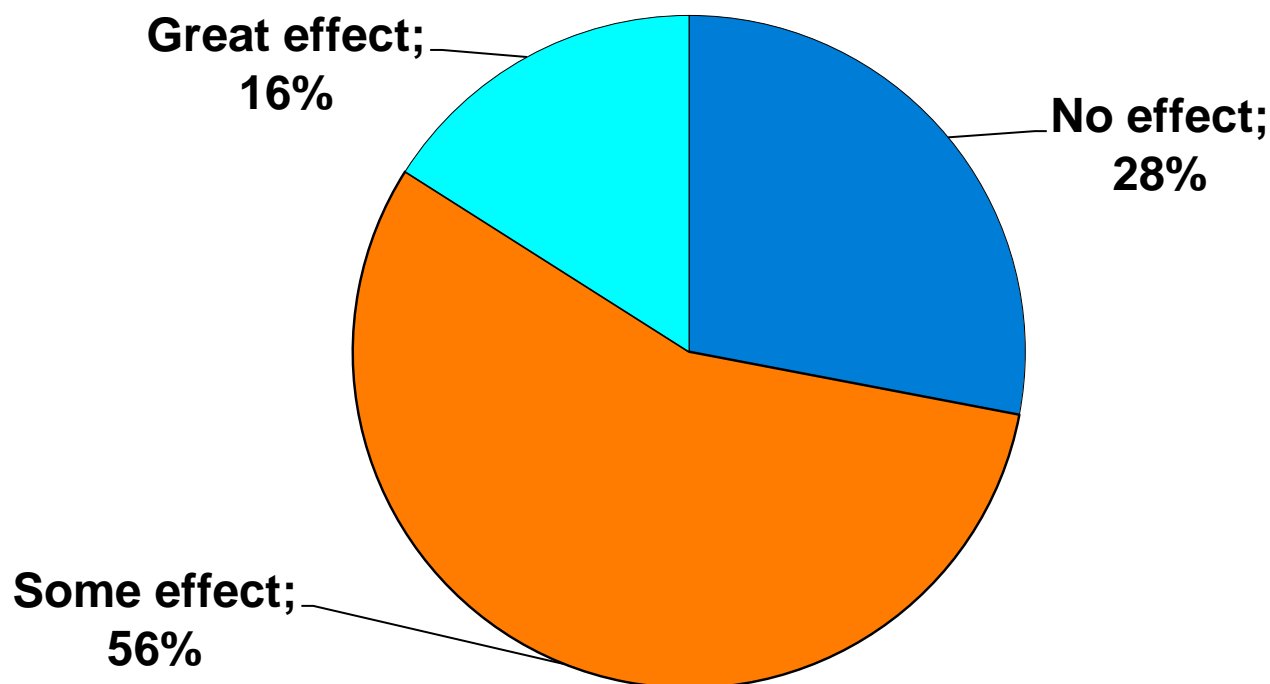
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.0** out of possible 7.0
- Agree (Score 6-7) – **10%**
- Neutral (Score 4-5) – **38%**
- Disagree (Score 1-3) – **51%**

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

