



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

JUNE 2012



Prepared by: QMark Research

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Background & Methodology

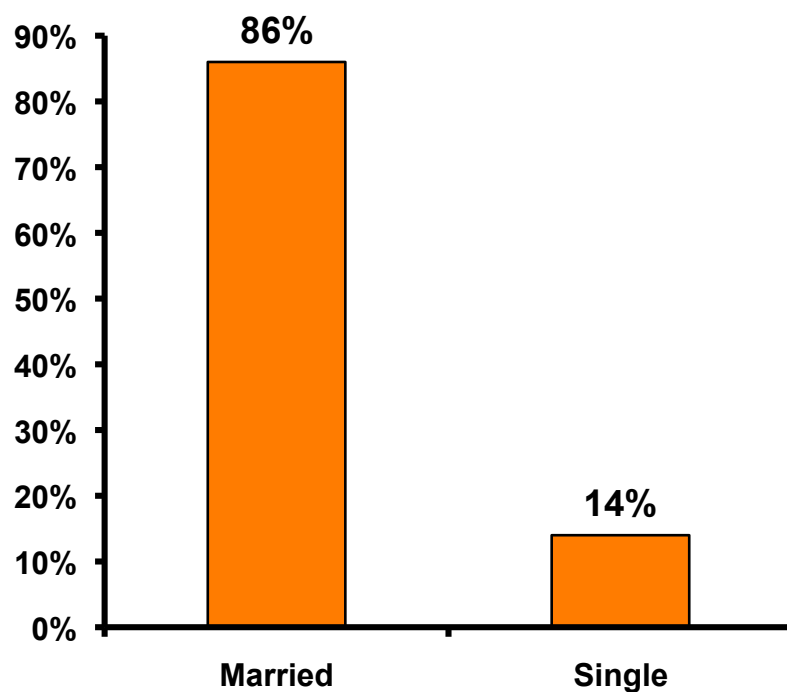
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

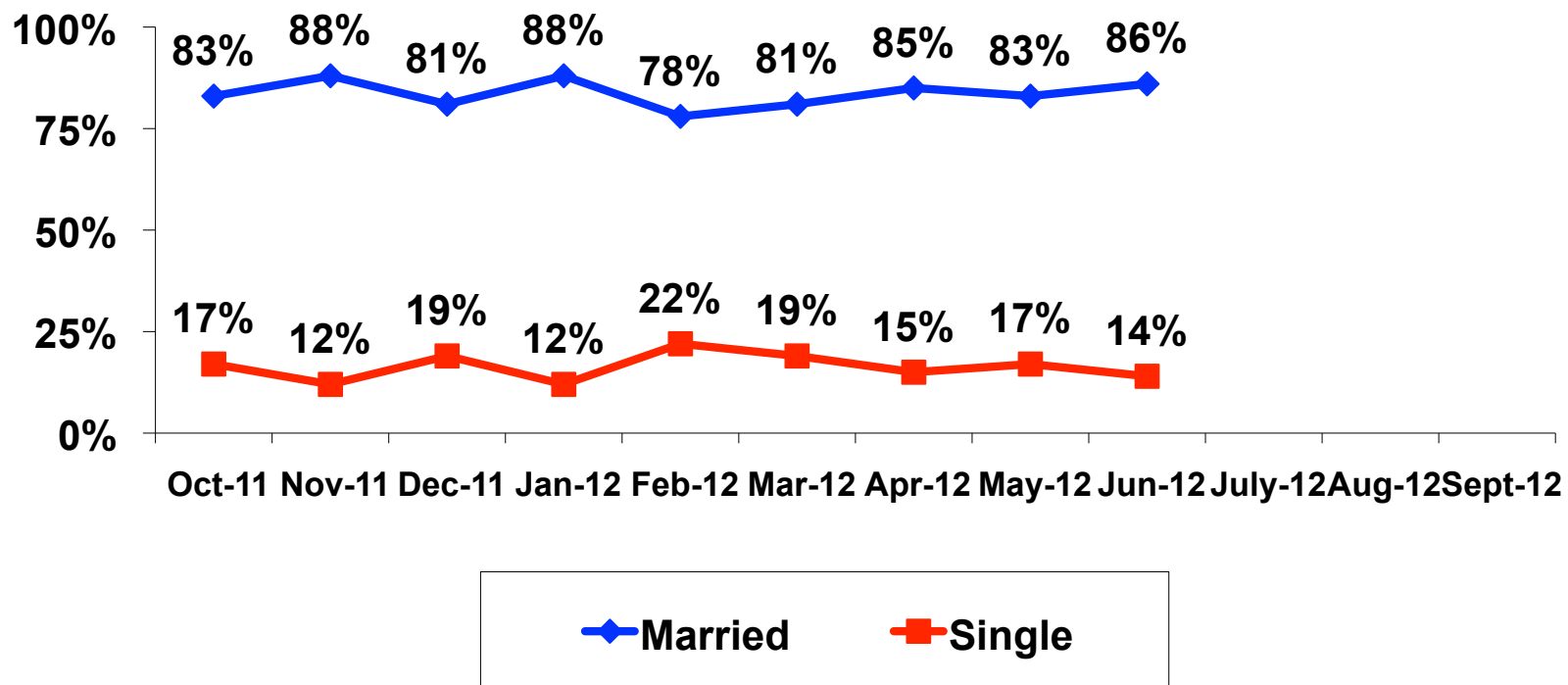
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

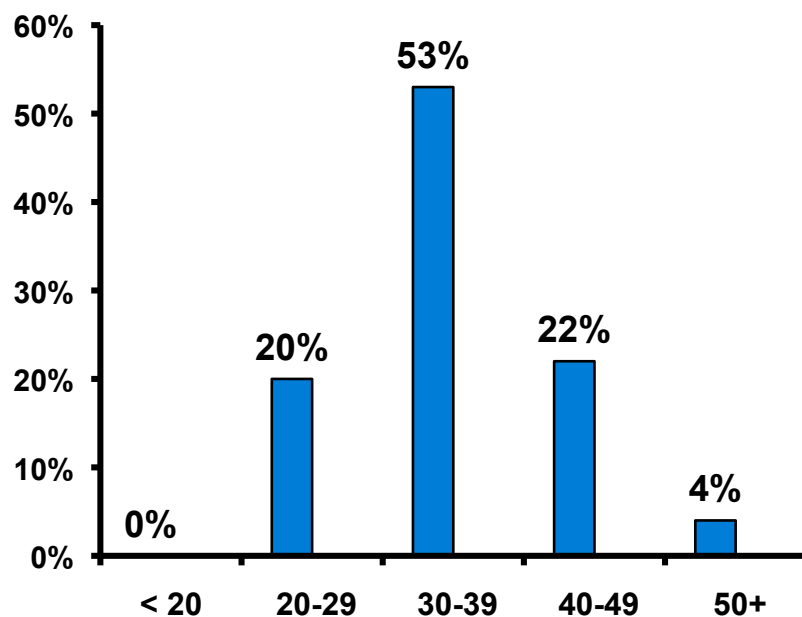


- A majority of visitors are married.

Marital Status

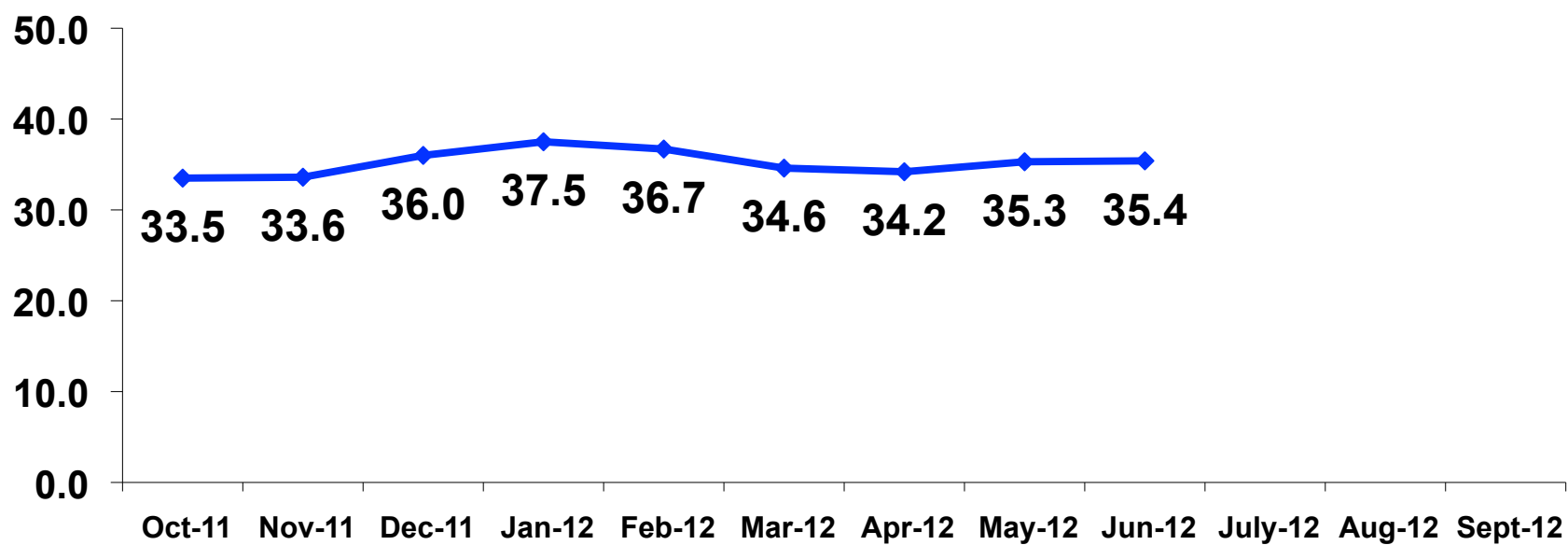


Age - Overall

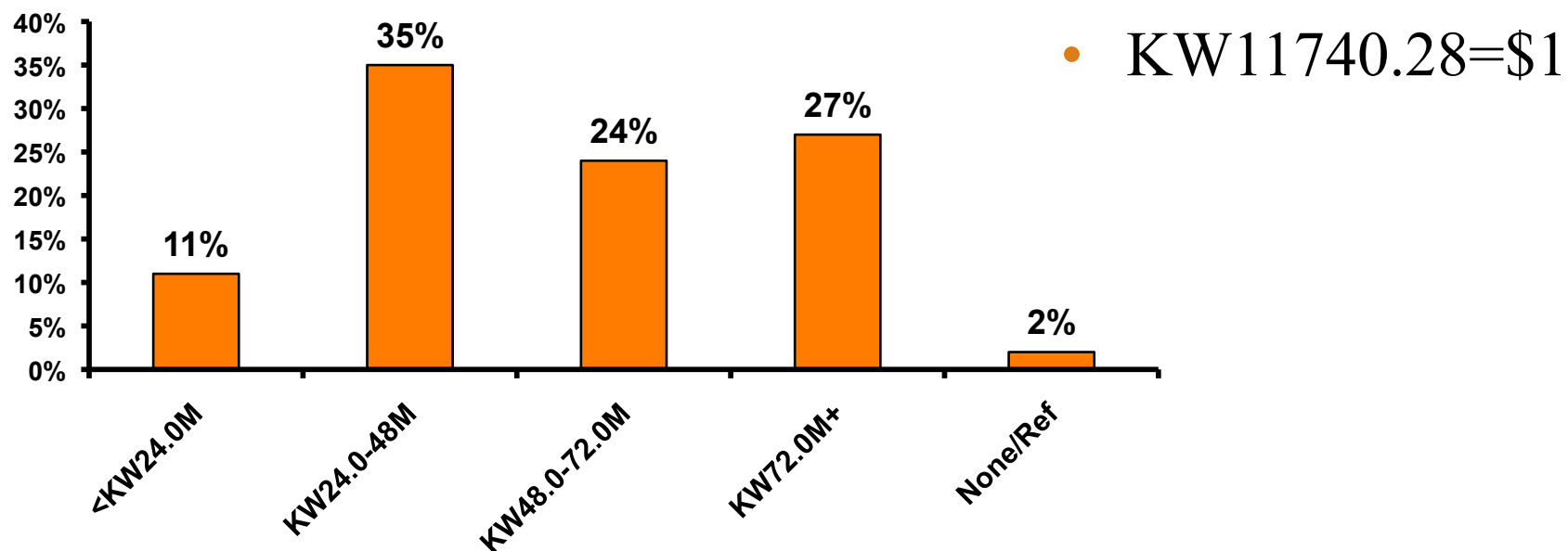


- The average age of the respondents is 35.4 years of age.

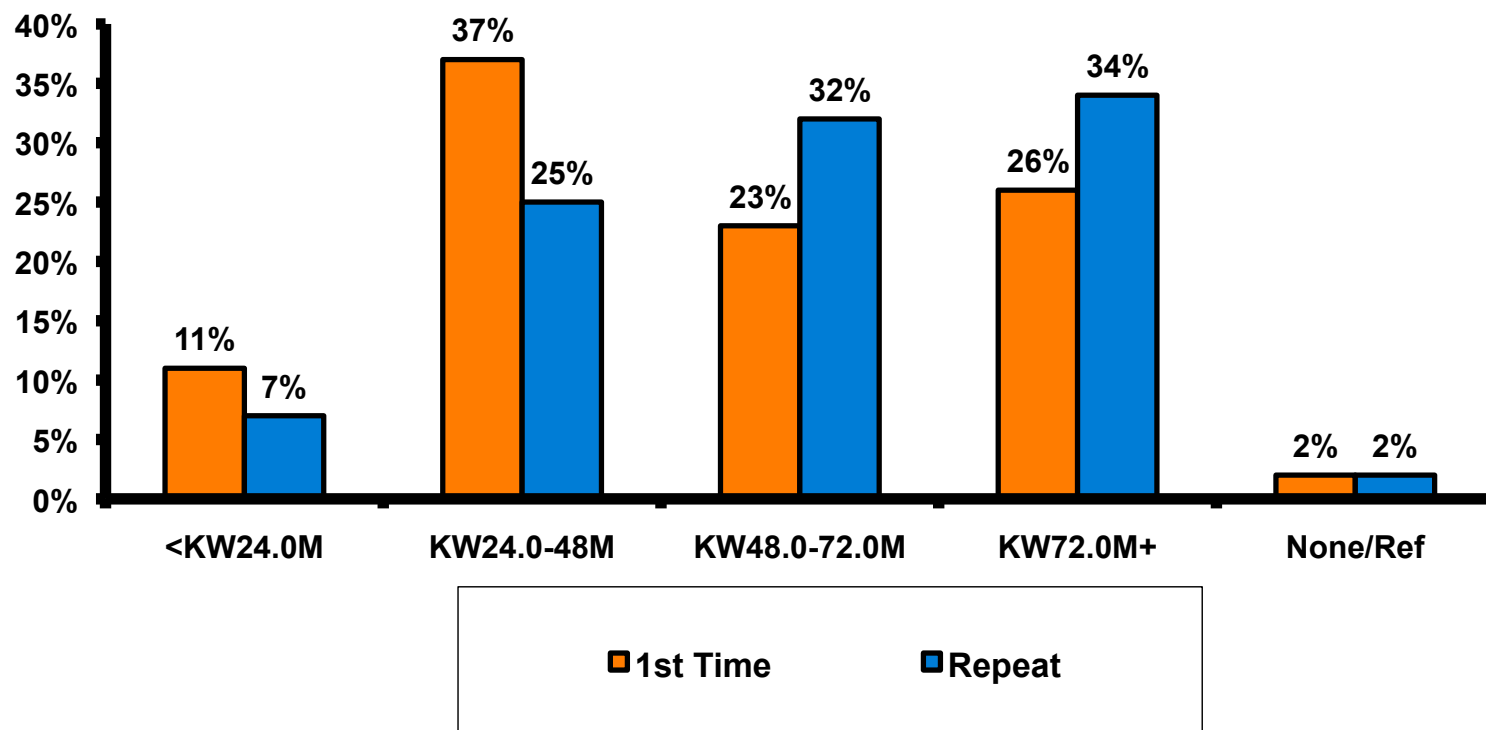
Average Age



Personal Income



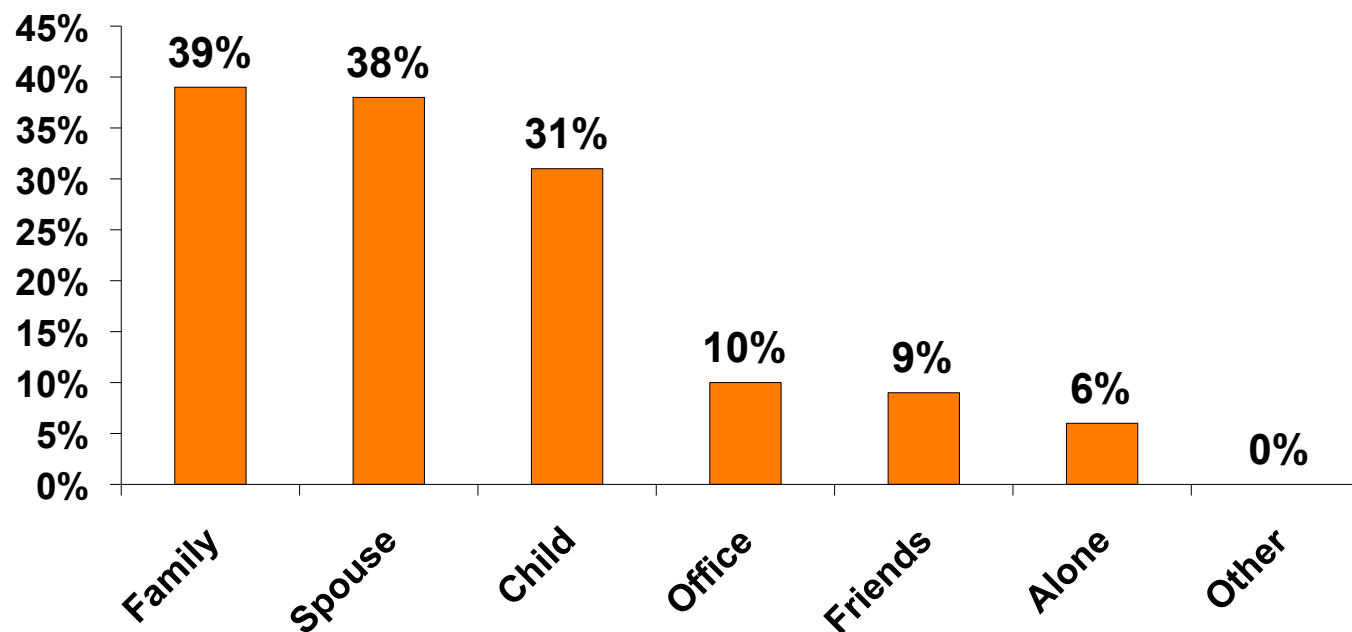
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	38	11	27	13	16	7	2
			11%	6%	16%	19%	9%	9%	14%
	KW24.0M-KW48.0M	Count	118	60	58	26	68	19	5
			35%	35%	35%	38%	38%	25%	36%
	KW48.0M-KW72.0M	Count	82	43	39	18	46	16	2
			24%	25%	24%	26%	26%	21%	14%
	KW72.0M+	Count	91	54	37	9	44	33	5
			27%	32%	22%	13%	25%	43%	36%
	Refused	Count	7	3	4	2	4	1	
			2%	2%	2%	3%	2%	1%	
Total	Count	336	171	165	68	178	76	14	

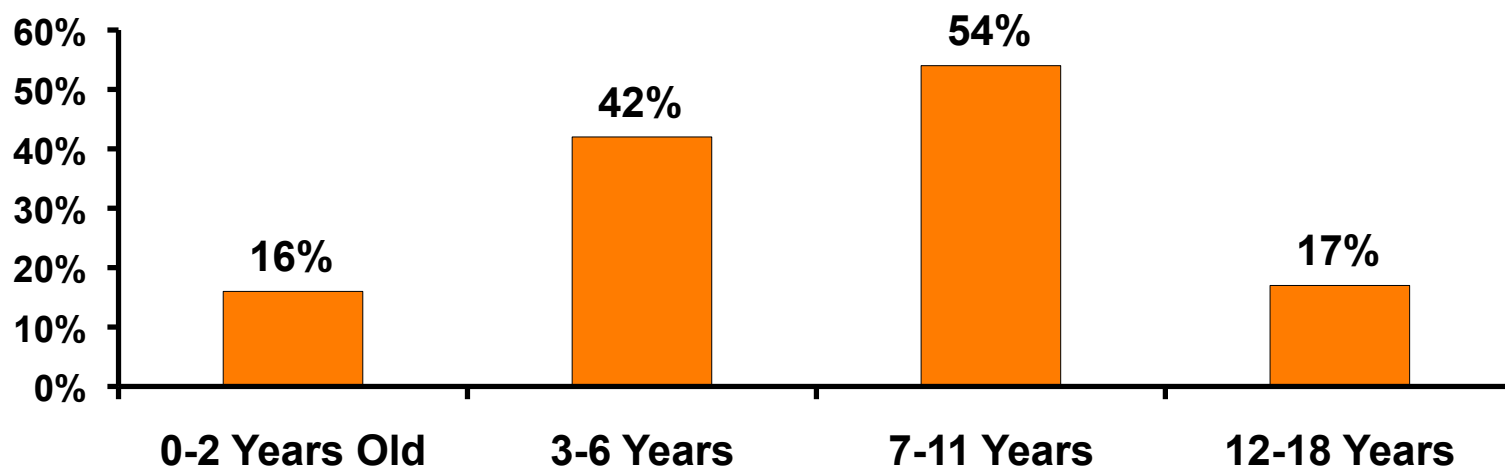
Travel Companions



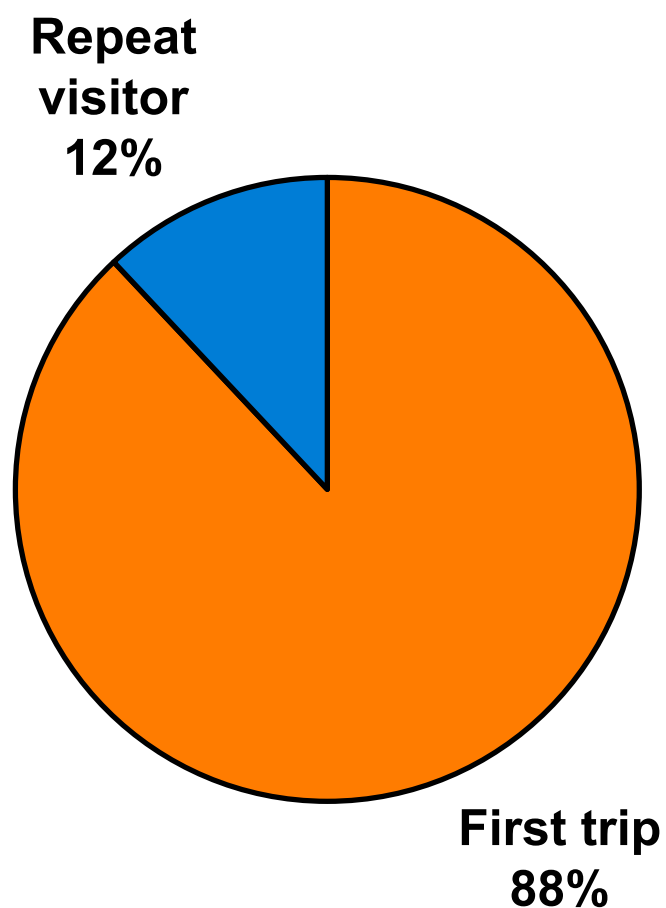
Number of Children Travel Party

N=109 total respondents traveling with children.

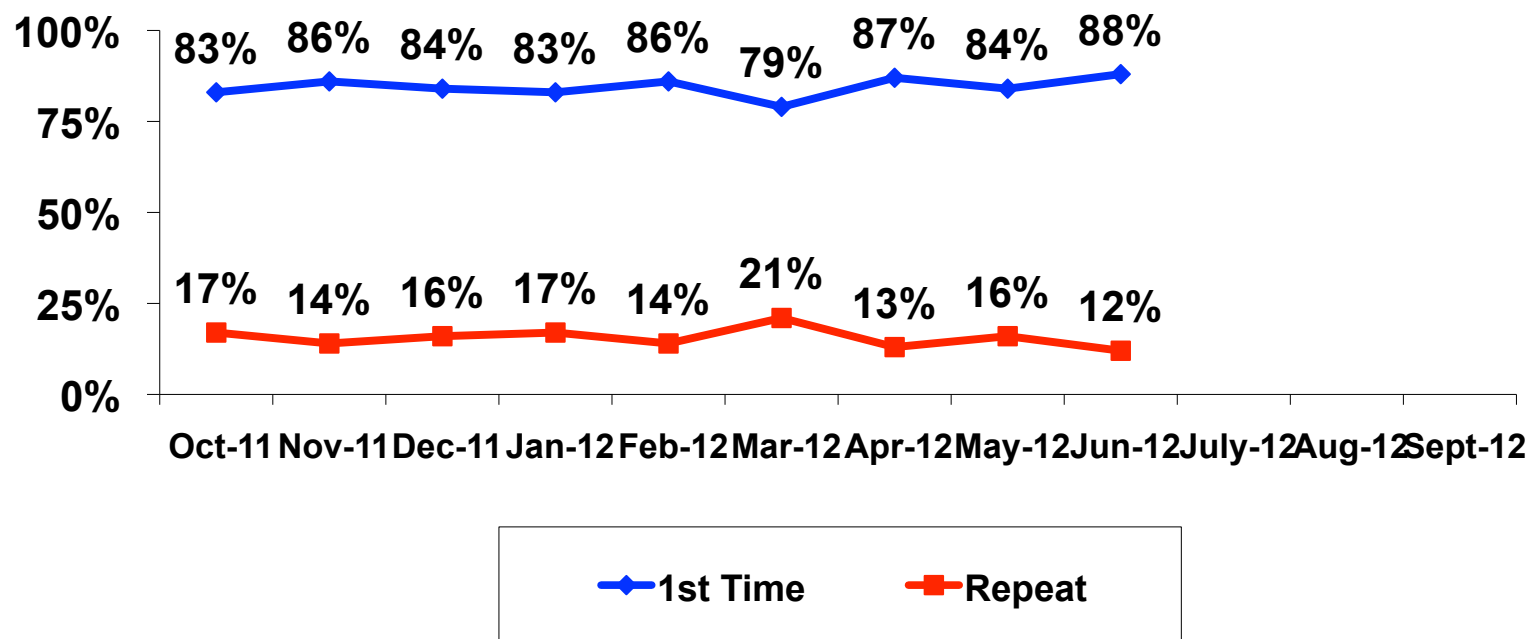
(Of those N=109 respondents, there is a total of 180 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



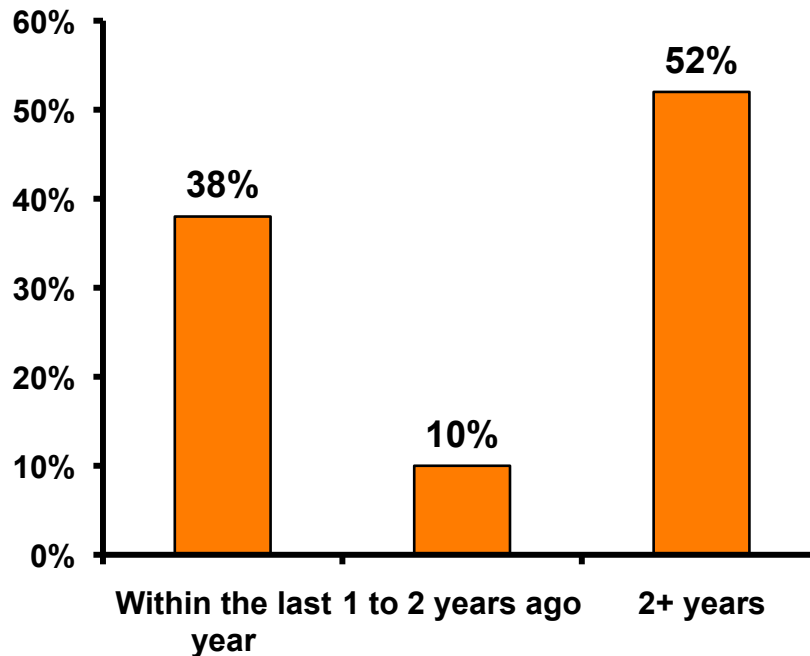
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	175	151	24
			50%	49%	57%
	Female	Count	177	159	18
			50%	51%	43%
Total	Count		352	310	42
AGE	<20	Count	1	1	
			0%	0%	
	20-29	Count	71	66	5
			20%	21%	12%
	30-39	Count	186	167	19
			53%	54%	45%
	40-49	Count	79	63	16
			22%	20%	38%
	50+	Count	15	13	2
			4%	4%	5%
Total	Count		352	310	42

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

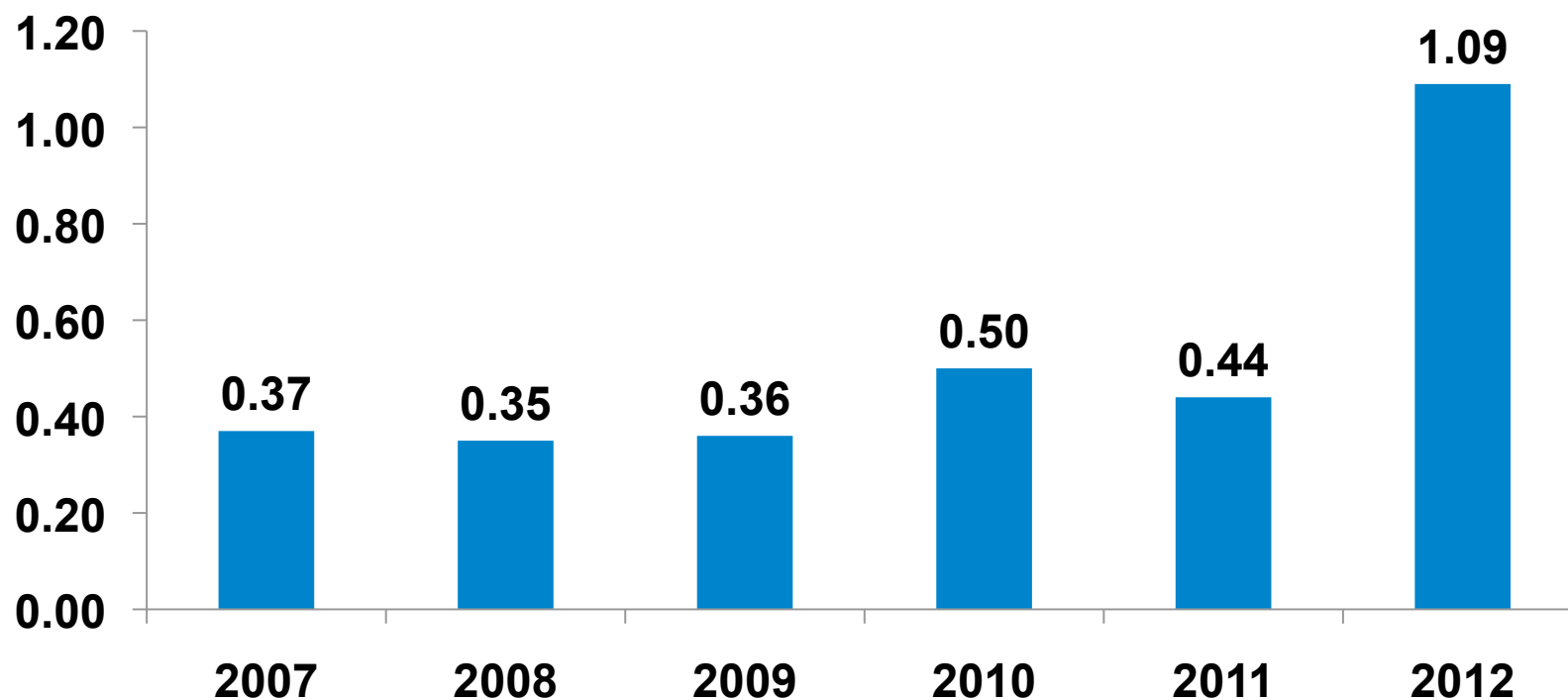
Repeat Visitors Last Trip

n = 42



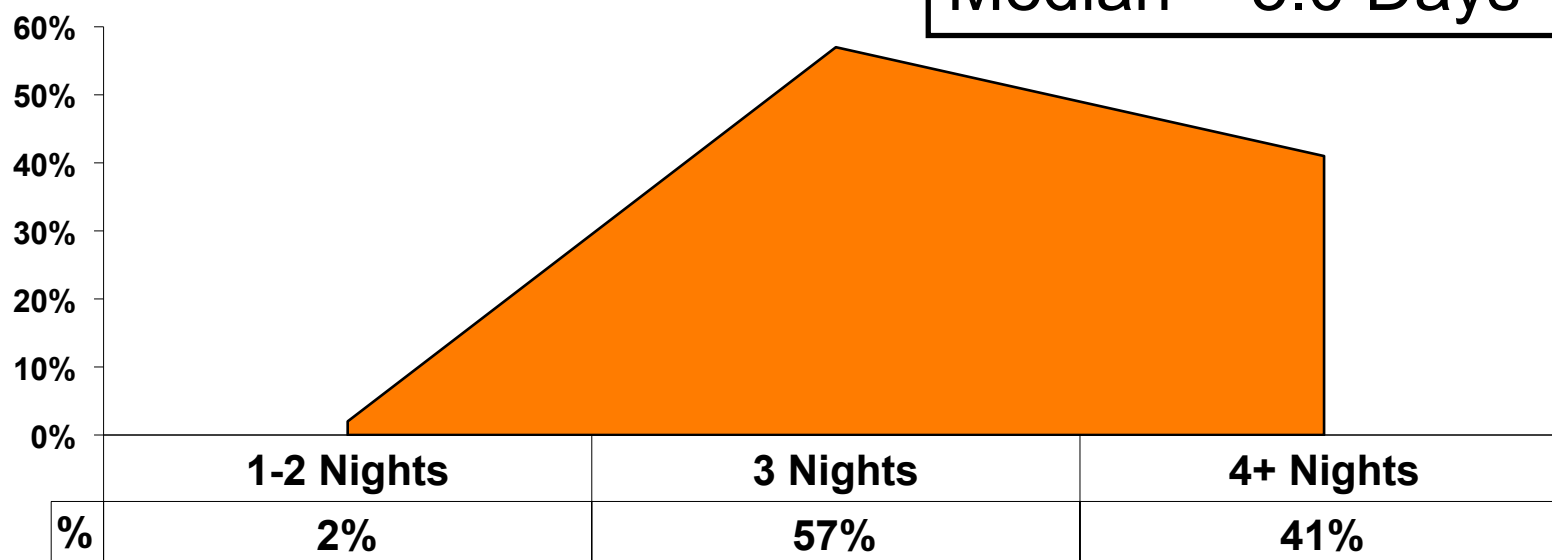
- The average repeat visitor has been to Guam 2.9 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2006-2012) (2 nights or more)

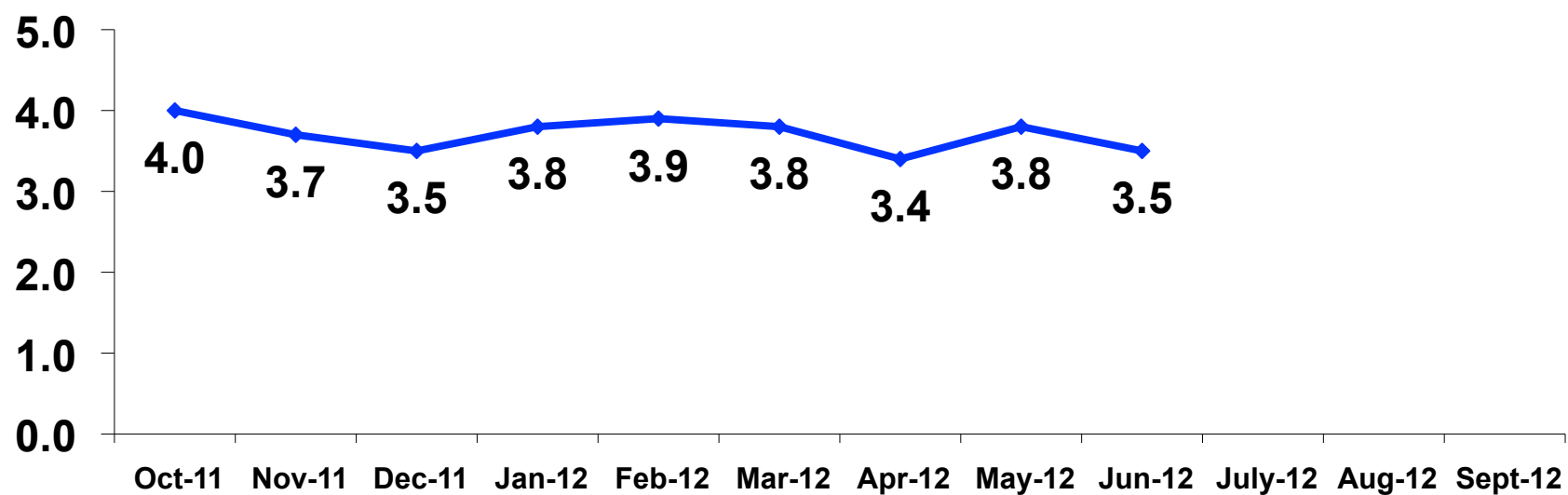


Length of Stay

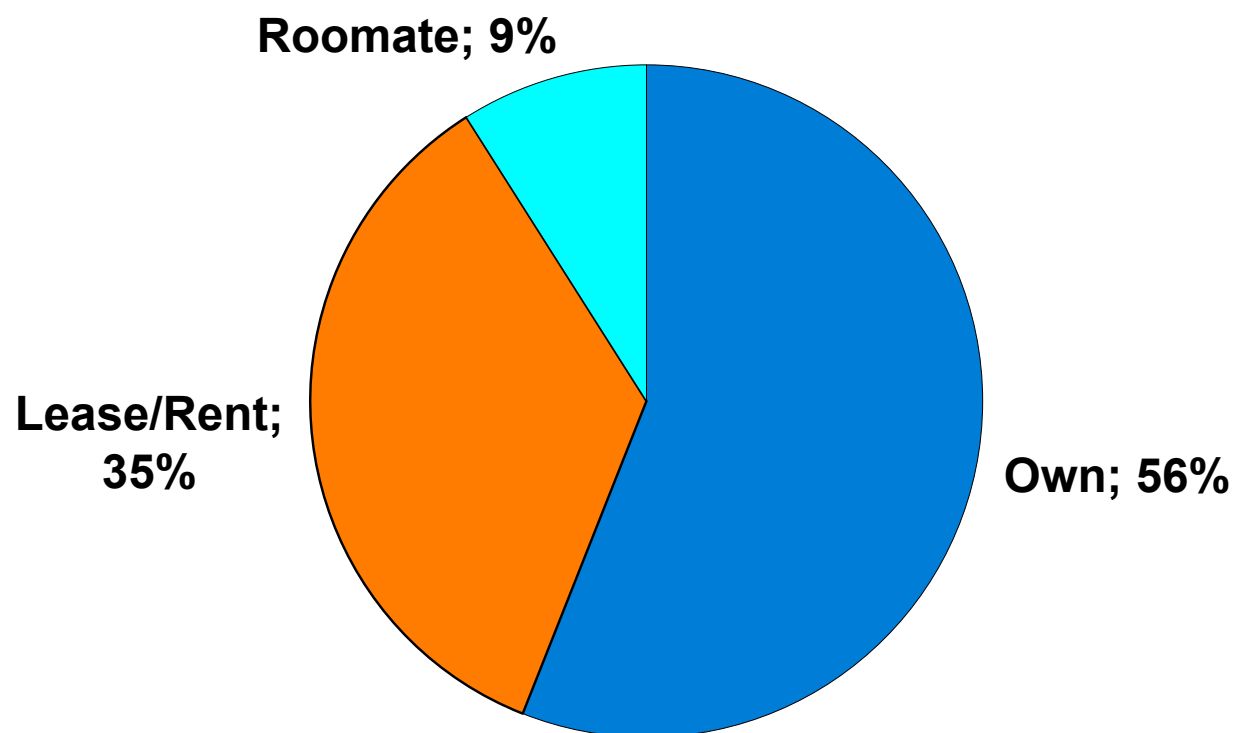
Mean = 3.50 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

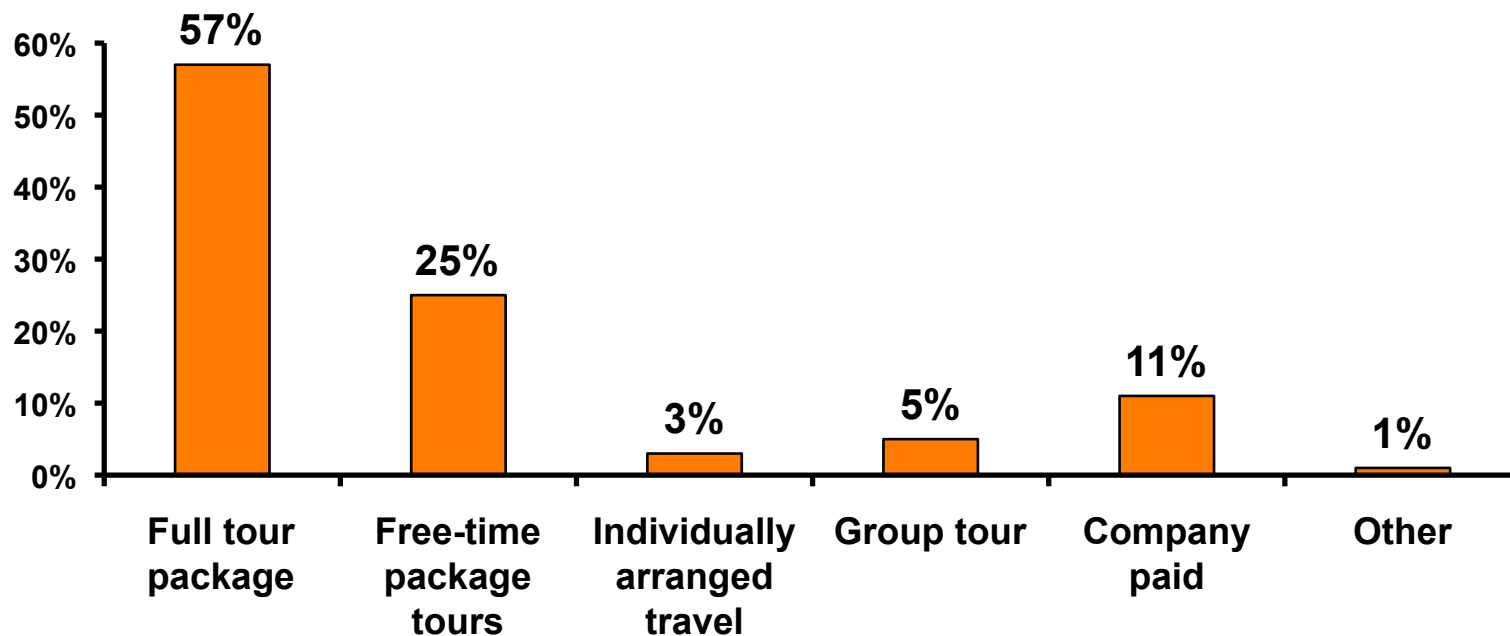


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.29	White Collar-Office	26%	8%	32%	33%	24%	43%
	Self-employed	24%	29%	18%	26%	28%	
	Prof/Specialist/Tech	10%	13%	11%	9%	11%	
	Homemaker	11%	8%	9%	9%	9%	
	Service worker	5%	18%	3%	2%	4%	
	Manager	4%	3%	3%	4%	8%	
	Other	4%	5%	5%	1%	4%	
	Professor/Teacher	3%	5%	3%	5%	3%	
	Govt-Exec	3%	3%	6%		2%	
	Sales/Clerical	3%		4%	2%	2%	
	Student	2%	5%	2%	2%		14%
	Skilled worker	1%		3%	1%	1%	
	Govt-Mgr	1%			5%		
	Govt - Office/non-mgr	1%		3%			
	Judicial	1%	3%		1%	1%	
	Free-lancer	1%		1%		1%	
	Unemployed	1%					29%
	Total	Count	349	38	117	82	90

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

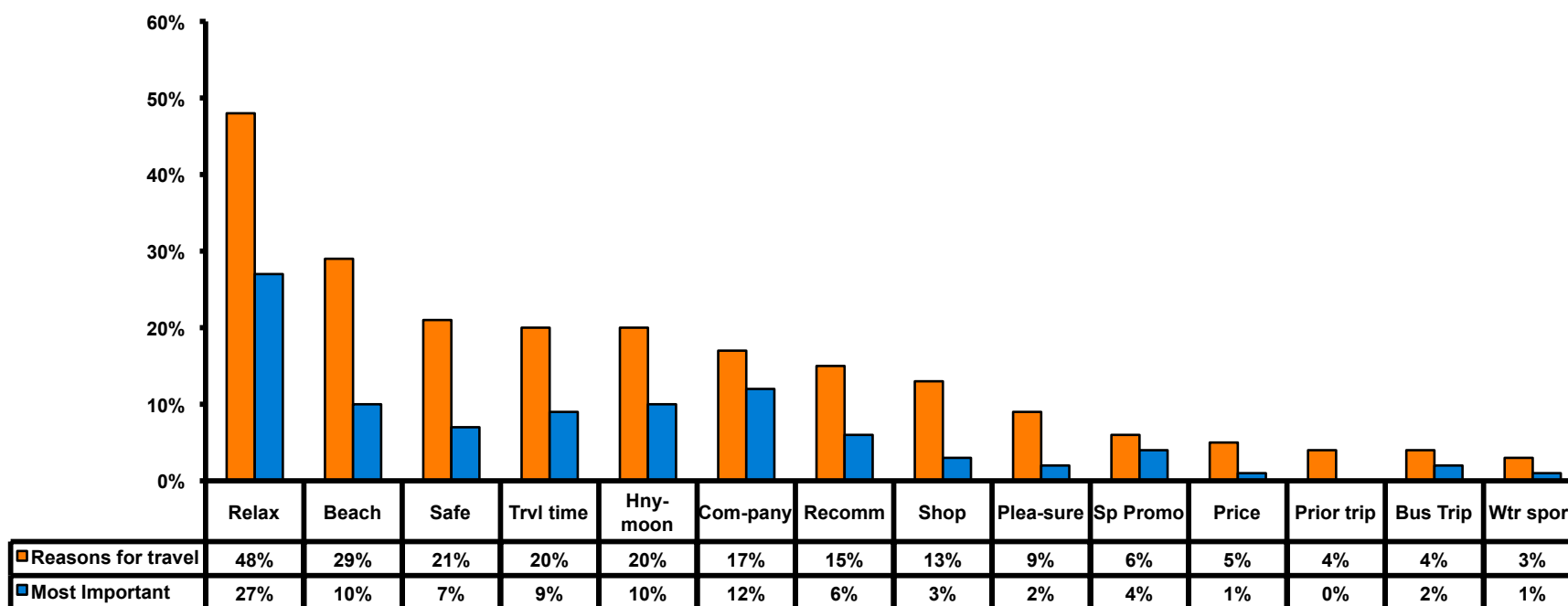


Accommodation by Income

Average length of stay: 3.50 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	65%	70%	55%	65%	84%	
	Hyatt Regency Guam	11%	5%	17%	10%	7%	43%
	Sheraton Laguna Resort	7%	8%	13%	5%	2%	
	Hilton Guam Resort & Spa	3%		2%	4%	2%	29%
	Hotel Nikko Guam	3%	3%	3%	4%		14%
	The Westin Resort Guam	2%	3%	3%	2%	1%	
	Outrigger Guam Resort	2%		2%	2%		14%
	Holiday Resort Guam	2%	3%	3%	1%		
	Onward Beach Resort	1%			5%		
	Fiesta Resort Guam	1%		2%		2%	
	Relatives, Friends, Home Stay	1%	3%			1%	
	Leo Palace Resort	0%				1%	
	Guam Reef Hotel	0%			1%		
	Oceanview Hotel	0%	3%				
	Grand Plaza Hotel	0%	3%				
	Royal Orchid Guam	0%			1%		
	Ramada Suites Guam	0%		1%			
Total	Count	351	37	118	82	91	7

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
 - Company sponsored trip,
 - Guam's natural beauty/beaches, 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	48%		39%	51%	54%	27%	49%	47%
	Beautiful seas, beaches, tropical climate	29%	100%	23%	29%	34%	40%	29%	30%
	It is a safe place to spend a vacation	21%		14%	22%	25%	27%	19%	23%
	Short travel time	20%		25%	21%	13%	13%	14%	25%
	Honeymoon	20%		44%	19%	3%		19%	20%
	My company sponsored me	17%	100%	13%	14%	23%	40%	15%	19%
	Recommendation of friend, relative, travel agency	15%		8%	19%	10%	20%	16%	14%
	Shopping	13%		14%	17%	8%		9%	18%
	Pleasure	9%		14%	7%	10%	13%	10%	9%
	Special promotion	6%		4%	5%	9%	7%	5%	7%
	Price of the tour package	5%		7%	5%	5%		4%	6%
	A previous visit	4%		4%	3%	5%	7%	3%	4%
	Company or Business trip	4%		4%	3%	3%	13%	5%	2%
	Water sports	3%		1%	2%	6%	13%	3%	4%
	Other	3%		1%	4%	3%	7%	3%	3%
	To visit friends or relatives	1%		1%	1%	3%		1%	2%
	Promotional materials from GVB	1%		1%	1%	1%		1%	1%
	To get married or Attend wedding	1%			2%			1%	1%
	SCUBA diving	1%			1%	3%		1%	1%
	To golf	1%		1%	1%	1%		2%	
	Career certification or testing	1%		1%	1%				2%
	Special Interest Tour	1%			2%			1%	1%
	Organized Sporting Activity	1%				3%		1%	1%
	Convention, Conference, Trade show	0%			1%			1%	
Total	Cases	351	1	71	185	79	15	175	176

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	48%	32%	42%	60%	53%	57%
	Beautiful seas, beaches, tropical climate	29%	18%	24%	35%	33%	43%
	It is a safe place to spend a vacation	21%	11%	24%	23%	21%	
	Short travel time	20%	16%	19%	23%	21%	
	Honeymoon	20%	16%	26%	20%	10%	29%
	My company sponsored me	17%	21%	18%	16%	18%	
	Recommendation of friend, relative, travel agency	15%	18%	9%	15%	21%	14%
	Shopping	13%	3%	15%	20%	9%	
	Pleasure	9%	8%	9%	13%	7%	
	Special promotion	6%	18%	4%	5%	5%	
	Price of the tour package	5%	8%	5%	6%	3%	
	A previous visit	4%	3%	4%	6%	2%	
	Company or Business trip	4%	3%	3%	2%	5%	14%
	Water sports	3%	3%	3%	1%	4%	14%
	Other	3%	8%	3%	1%	3%	
	To visit friends or relatives	1%	5%	1%		1%	
	Promotional materials from GVB	1%	3%	2%		1%	
	To get married or Attend wedding	1%		1%	1%	2%	
	To golf	1%				3%	
	Career certification or testing	1%		2%		1%	
Special Interest Tour	1%		2%	1%			
SCUBA diving	1%				2%		
Organized Sporting Activity	1%				2%		
Convention, Conference, Trade show	0%					14%	
Total	Cases	351	38	117	82	91	7

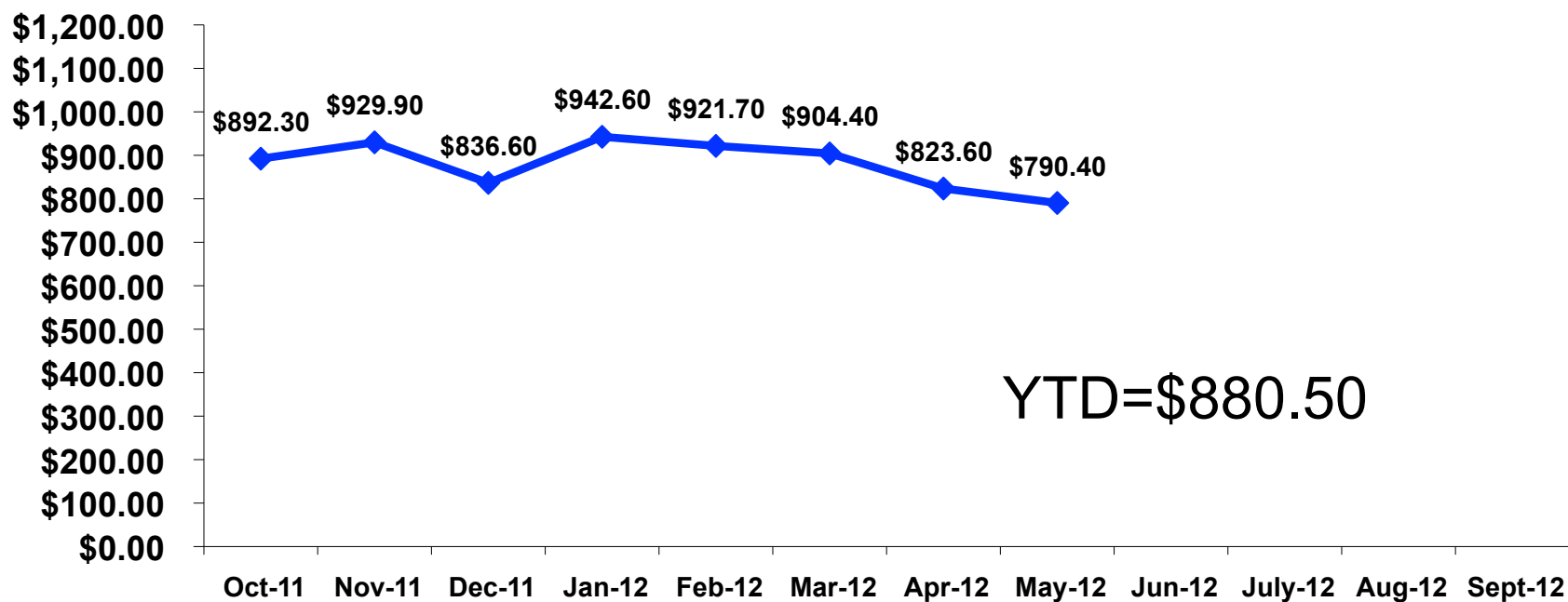
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1170.28/US\$1

- \$1,938.80 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,962 = maximum (highest amount recorded for the entire sample)
- \$790.40 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

KW1170.28=\$1

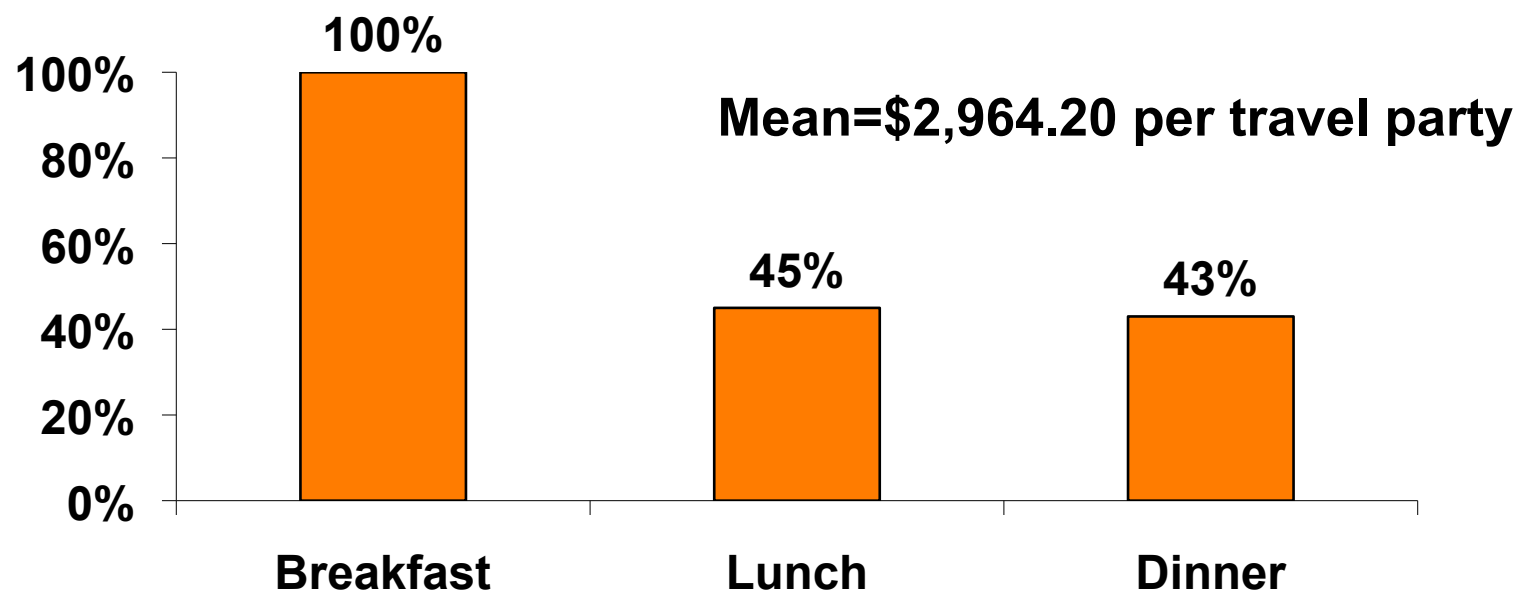
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,034.10
Air & Accommodation w/ daily meal package	\$2,964.20
Air only	\$1,251.20
Accommodation only	\$-
Accommodation w/ daily meal only	\$1,652.00
Food & Beverages in Hotel	\$-
Ground transportation - Korea	\$69.50
Ground transportation - Guam	\$-
Optional tours/ activities	\$294.10
Other expenses	\$399.00
Total Prepaid	\$1,938.80

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

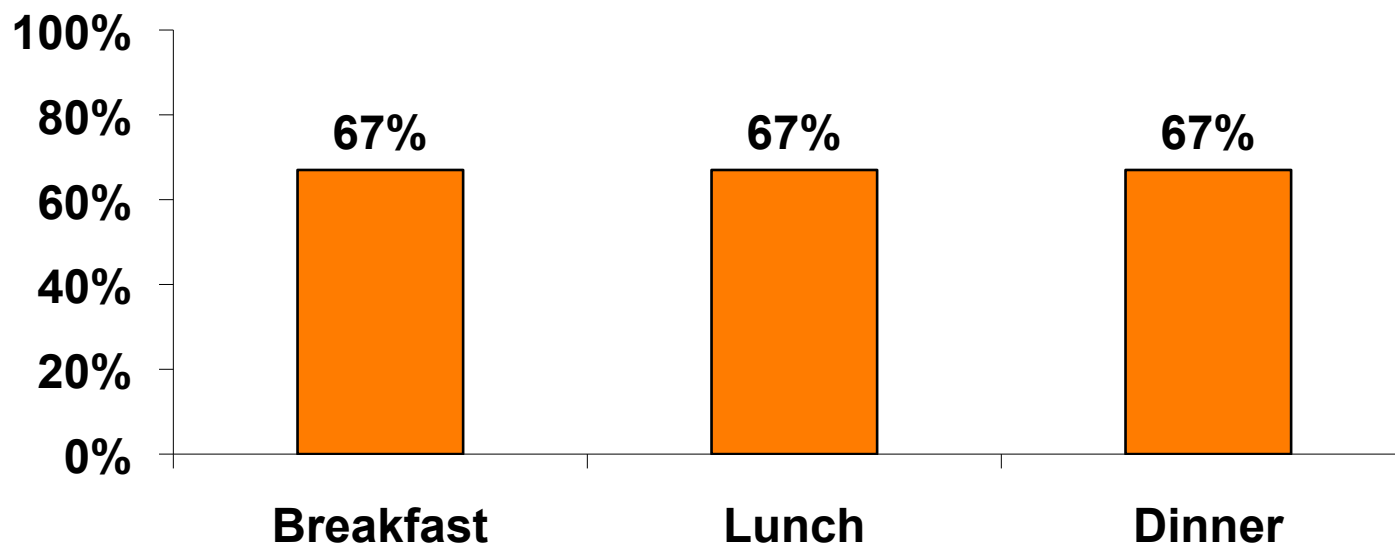
n=176



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

n= 3

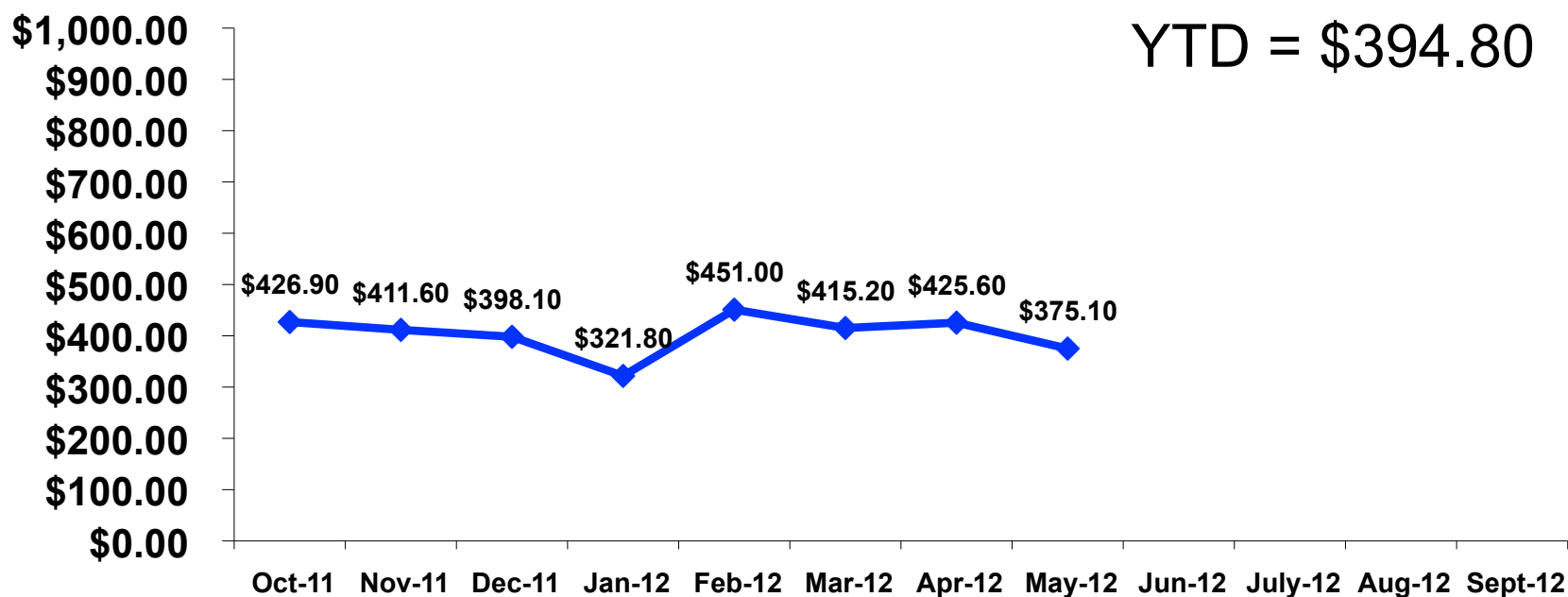


Mean= \$1,097.50 per travel party

On-Island Expenditures

- \$840.90 = 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)
- \$375.10 = overall mean average per person on-island expenditure

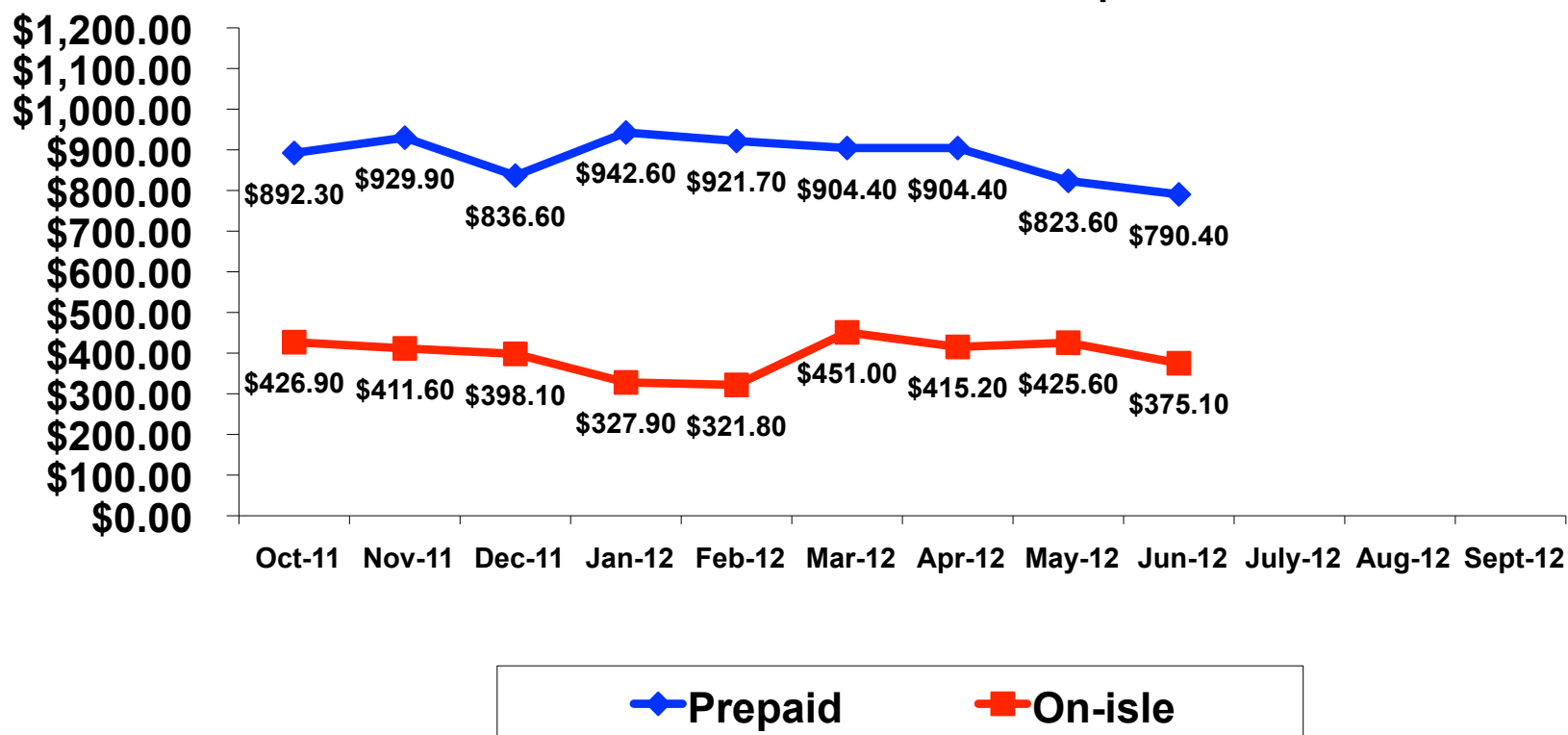
On-Island Expenditures Per Person



Prepaid/On-Island Expenditures Per Person

On-Island YTD = \$394.80

Prepaid YTD=\$880.50



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	\$840.87	\$998.91	\$684.63	\$1,226.31	\$1,045.01	\$840.61	\$854.29	\$100.00	\$819.00	\$681.29	\$509.78	\$546.25
	Median	\$553	\$600	\$500	\$750	\$600	\$500	\$1,000	\$100	\$500	\$500	\$365	\$350

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$51.23	\$76.54	\$26.49	\$0.00	\$12.46	\$47.44	\$103.42	\$13.47
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$25.55	\$26.73	\$24.40	\$0.00	\$23.85	\$31.67	\$13.96	\$20.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$43.54	\$50.09	\$37.15	\$0.00	\$37.89	\$58.32	\$21.41	\$6.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$111.98	\$116.91	\$107.16	\$75.00	\$102.82	\$110.70	\$117.78	\$143.33
	Median	\$0	\$0	\$0	\$75	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$194.65	\$241.43	\$148.92	\$0.00	\$186.96	\$215.37	\$177.37	\$78.33
	Median	\$0	\$0	\$0	\$0	\$0	\$34	\$0	\$10
GIFT/ SOUV- F&F AT HOME	Mean	\$136.17	\$159.45	\$113.41	\$0.00	\$214.89	\$114.68	\$116.81	\$138.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$18.42	\$21.06	\$15.84	\$0.00	\$26.56	\$20.02	\$9.62	\$7.20
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$258.30	\$308.54	\$209.20	\$25.00	\$332.98	\$255.99	\$193.85	\$284.00
	Median	\$10	\$30	\$0	\$25	\$15	\$10	\$0	\$70
TOTAL ON ISLAND	Mean	\$840.87	\$998.91	\$684.63	\$100.00	\$968.15	\$849.46	\$744.29	\$690.00
	Median	\$553	\$600	\$500	\$100	\$600	\$600	\$500	\$500

On-Island Expenditures

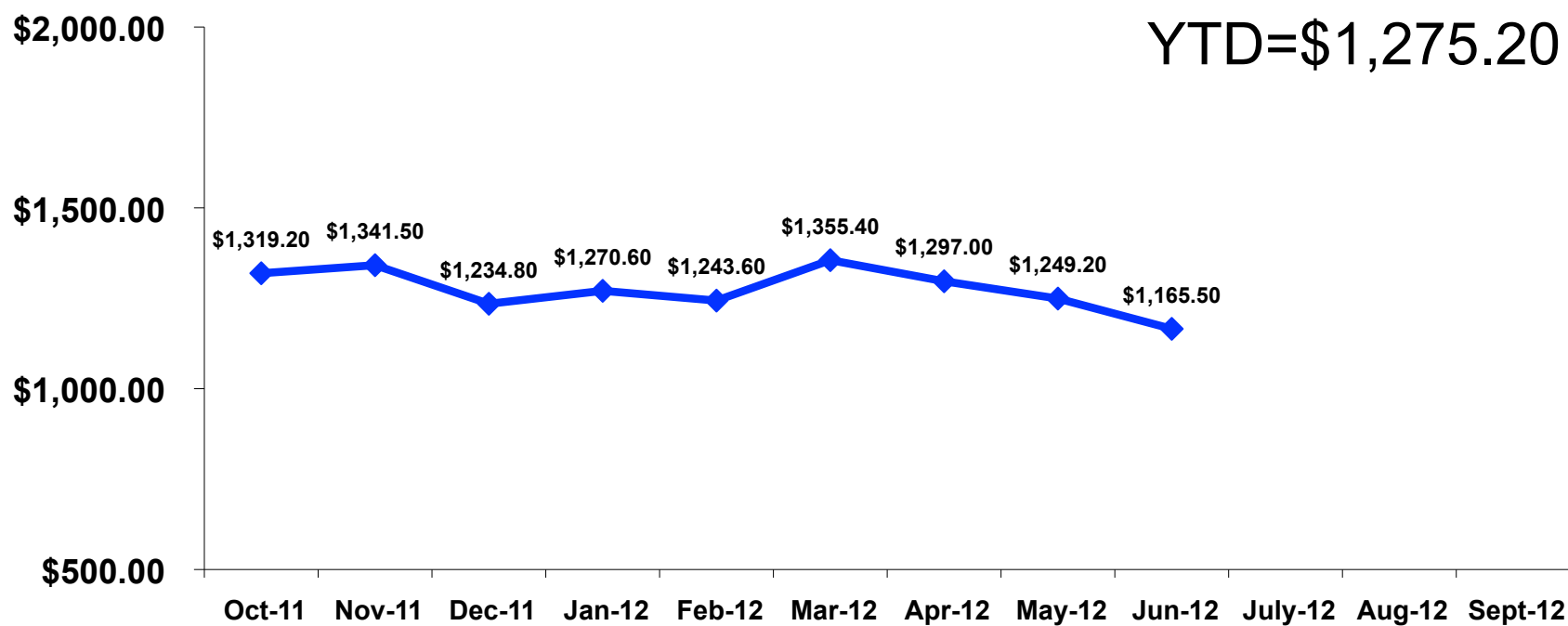
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$33.40	\$181.98
	Median	\$0	\$0
F&B-FF	Mean	\$24.49	\$33.31
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$29.74	\$144.76
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$114.03	\$96.95
TOUR	Median	\$0	\$0
GIFT/	Mean	\$184.16	\$271.55
SOUV-SELF	Median	\$0	\$75
GIFT/ SOUV-	Mean	\$129.40	\$185.81
F&F AT HOME	Median	\$0	\$8
LOCAL TRANS	Mean	\$15.71	\$38.29
	Median	\$0	\$0
OTHER EXP	Mean	\$266.74	\$196.38
	Median	\$10	\$2
TOTAL ON	Mean	\$797.93	\$1,157.83
ISLAND	Median	\$530	\$600

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,165.50 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,453 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

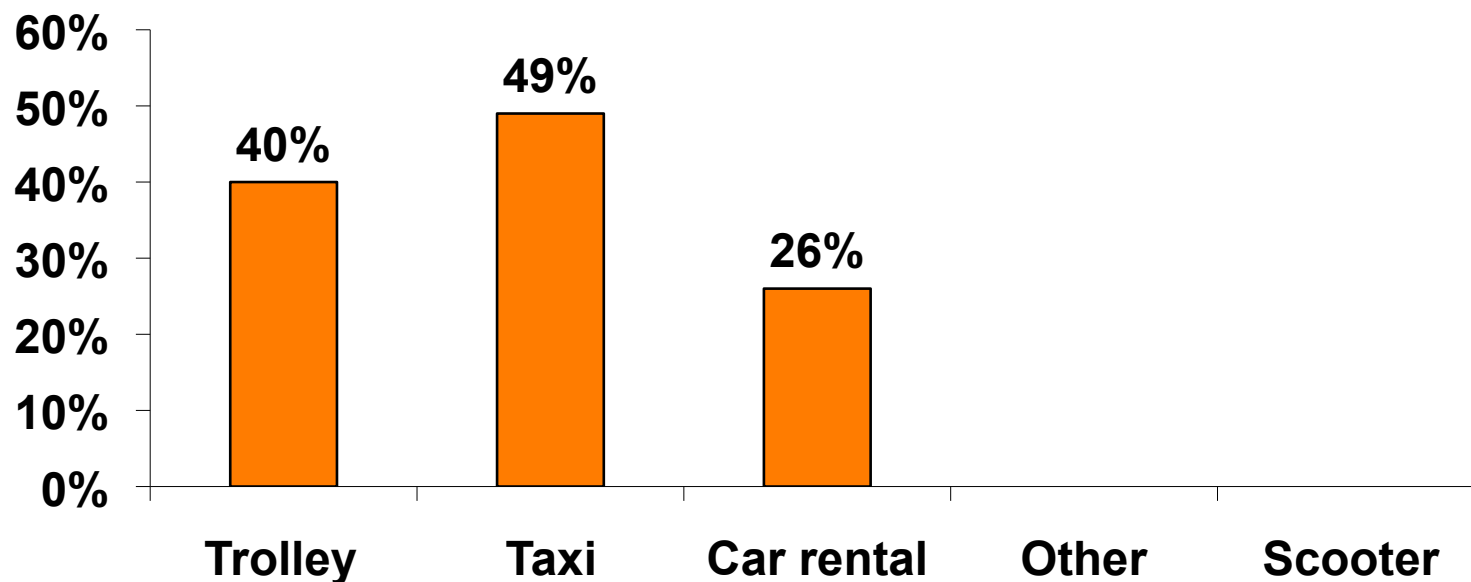


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$51.20
Food & beverage in fast food restaurant/ convenience store	\$25.50
Food & beverage at restaurants or drinking establishments outside a hotel	\$43.50
Optional tours and activities	\$112.00
Gifts/ souvenirs for yourself/companions	\$194.60
Gifts/ souvenirs for friends/family at home	\$136.20
Local transportation	\$18.40
Other expenses not covered	\$258.30
Average Total	\$840.90

Local Transportation

n=87



Mean=\$18.40 per travel party

Guam Airport Expenditures

- \$60.30 = 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

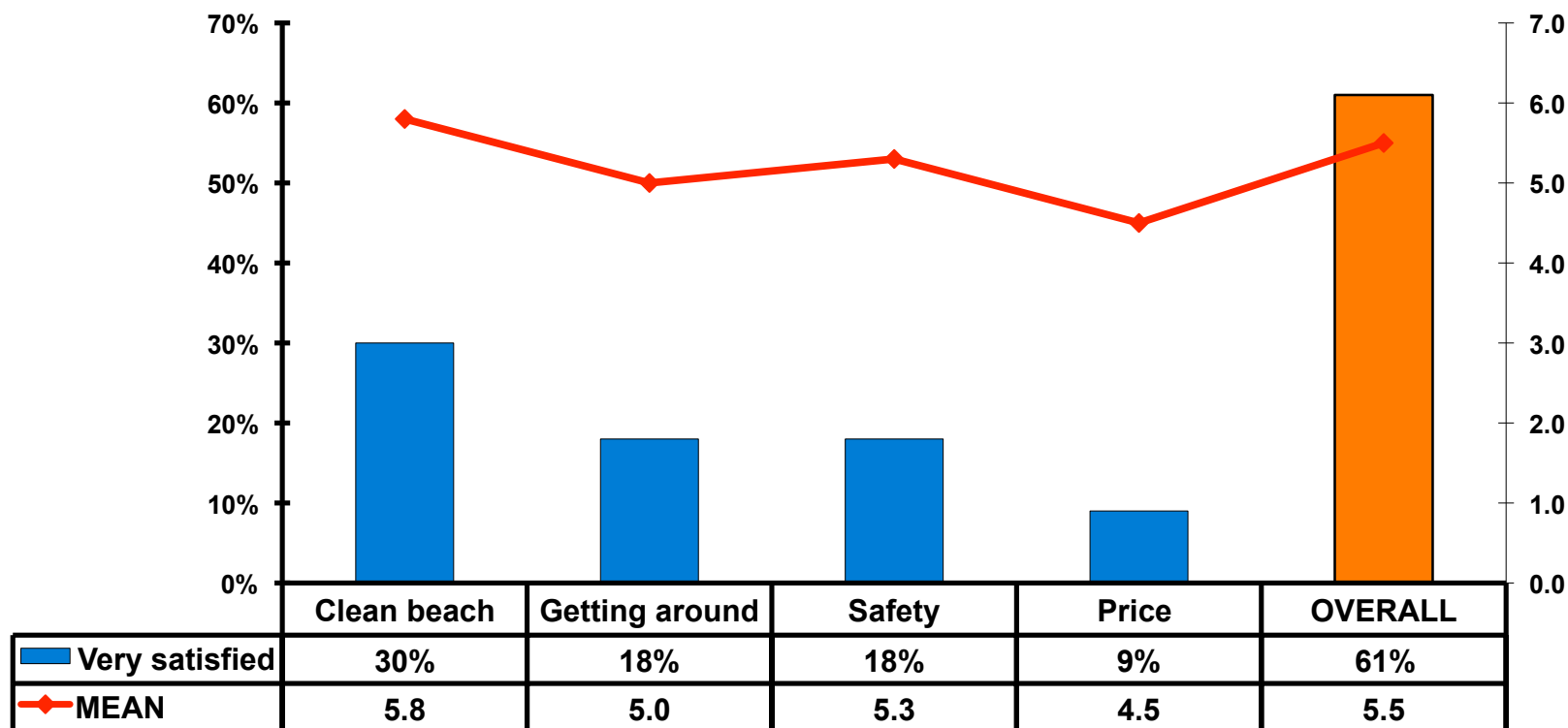
	MEAN \$
Food & Beverages	\$6.30
Gifts/Souvenirs Self	\$26.80
Gifts/Souvenirs Others	\$27.20
Total	\$60.30

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

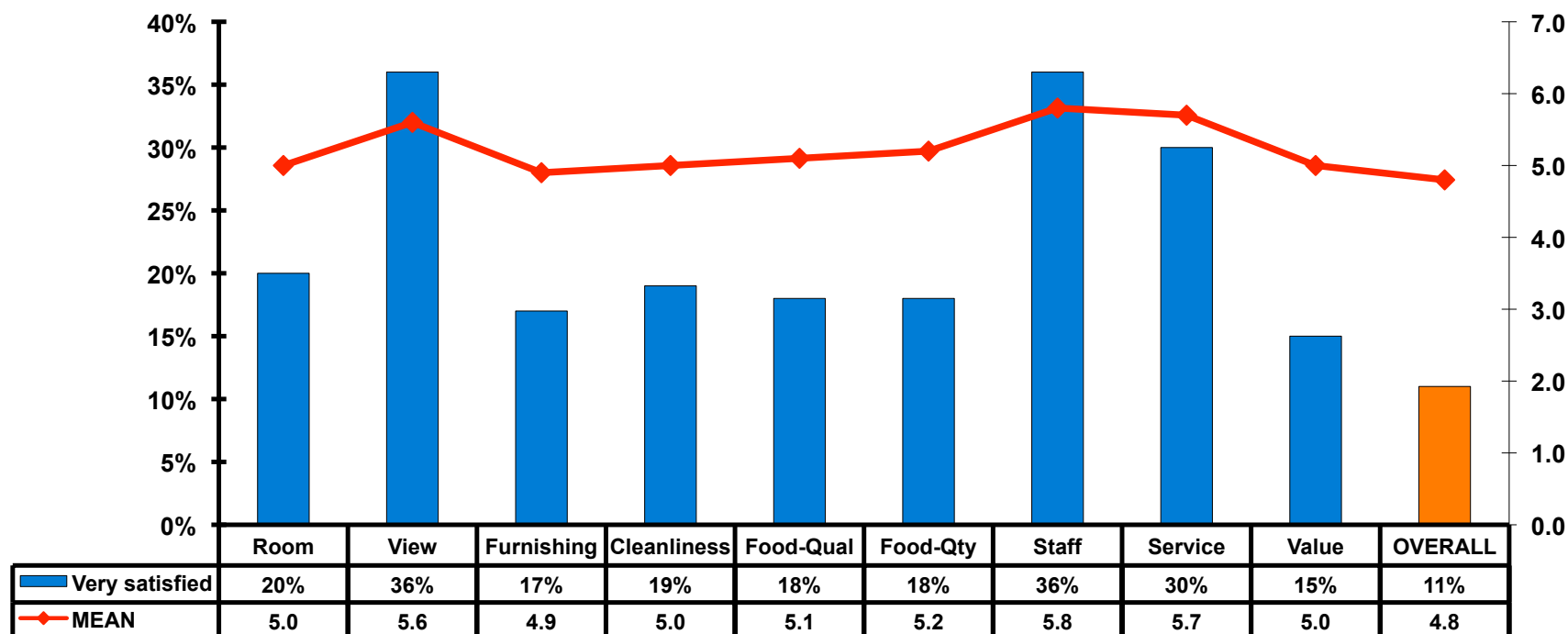
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

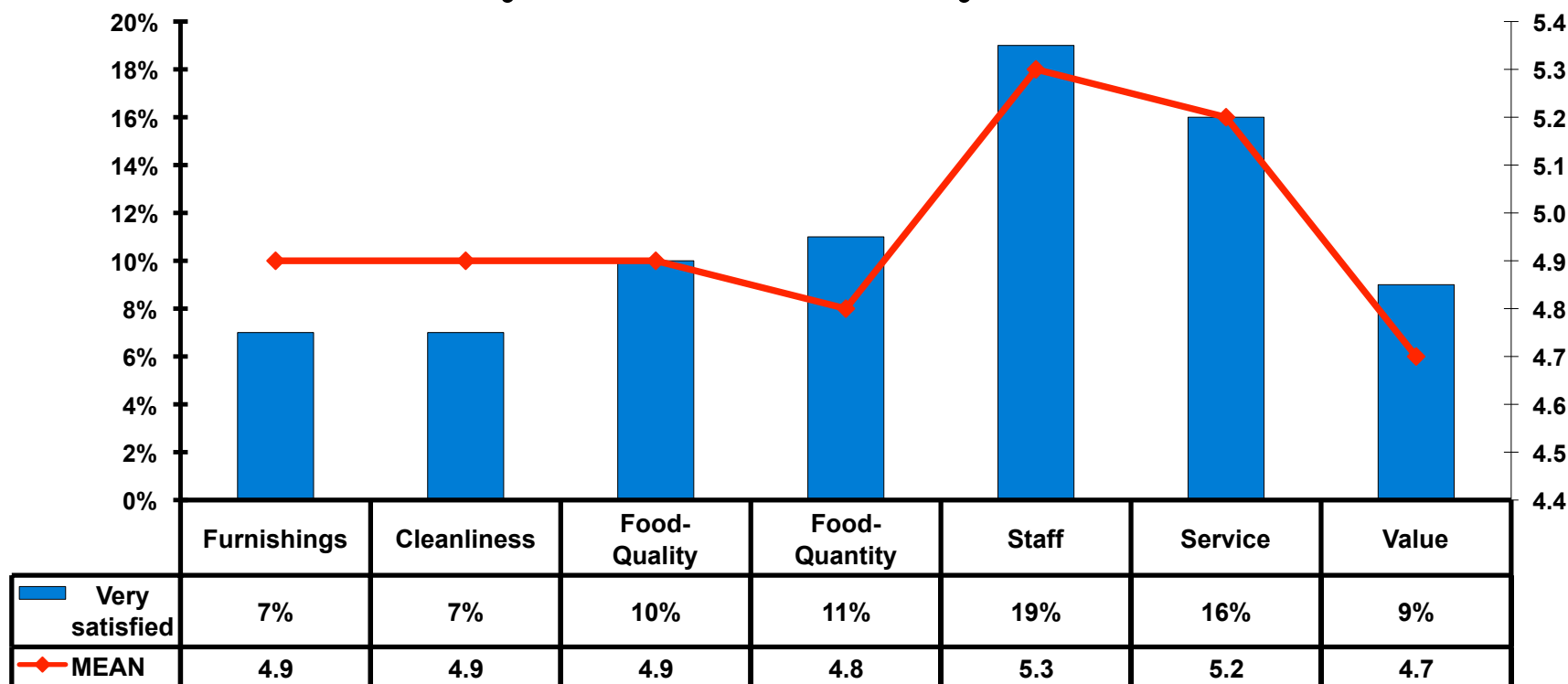
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

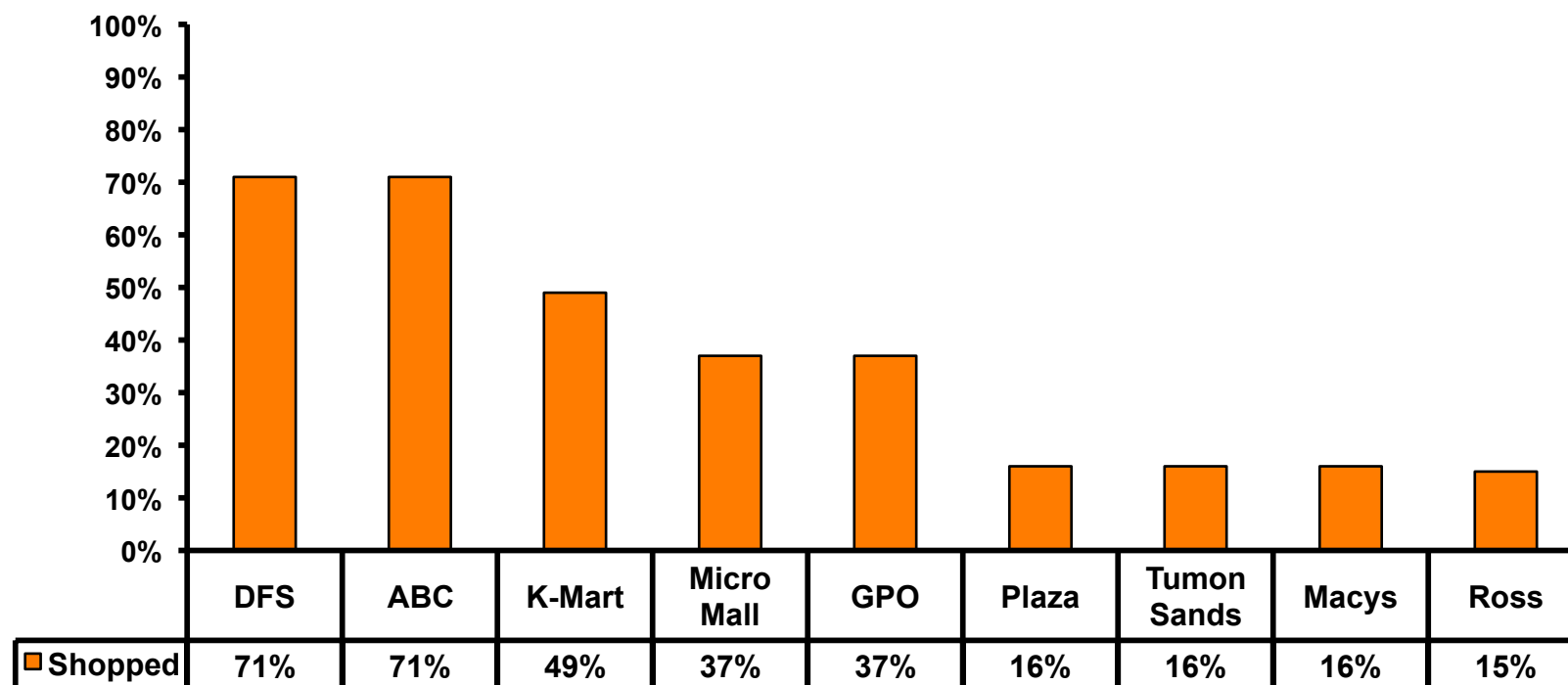
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

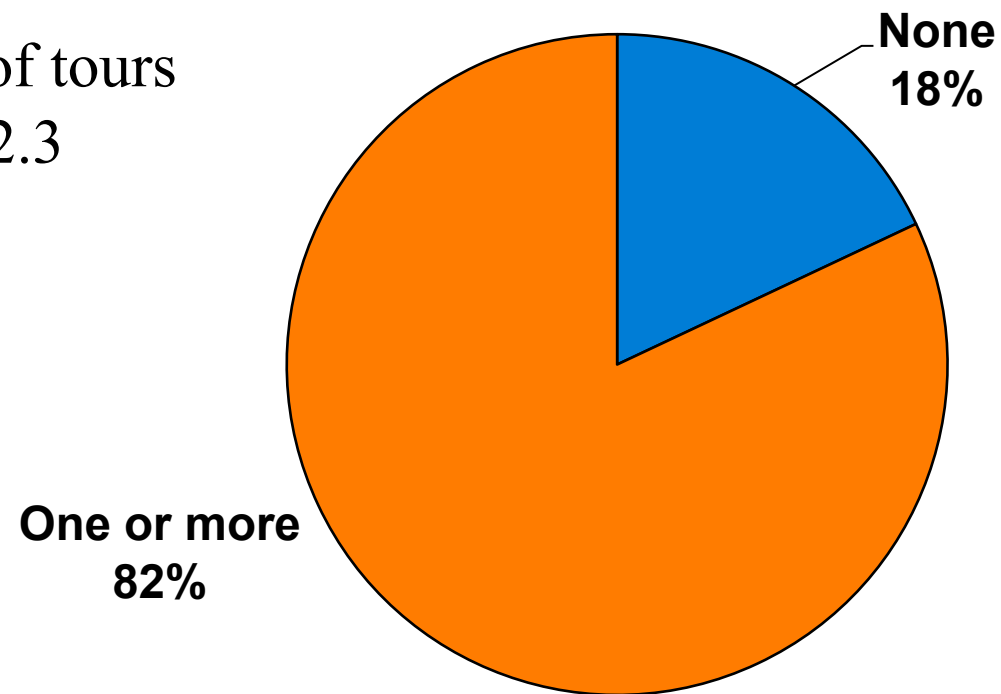
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 47%	Score of 6 to 7 = 46%
Score of 4 to 5 = 44%	Score of 4 to 5 = 41%
Score 1 to 3 = 9%	Score 1 to 3 = 13%
MEAN = 5.2	MEAN = 5.1

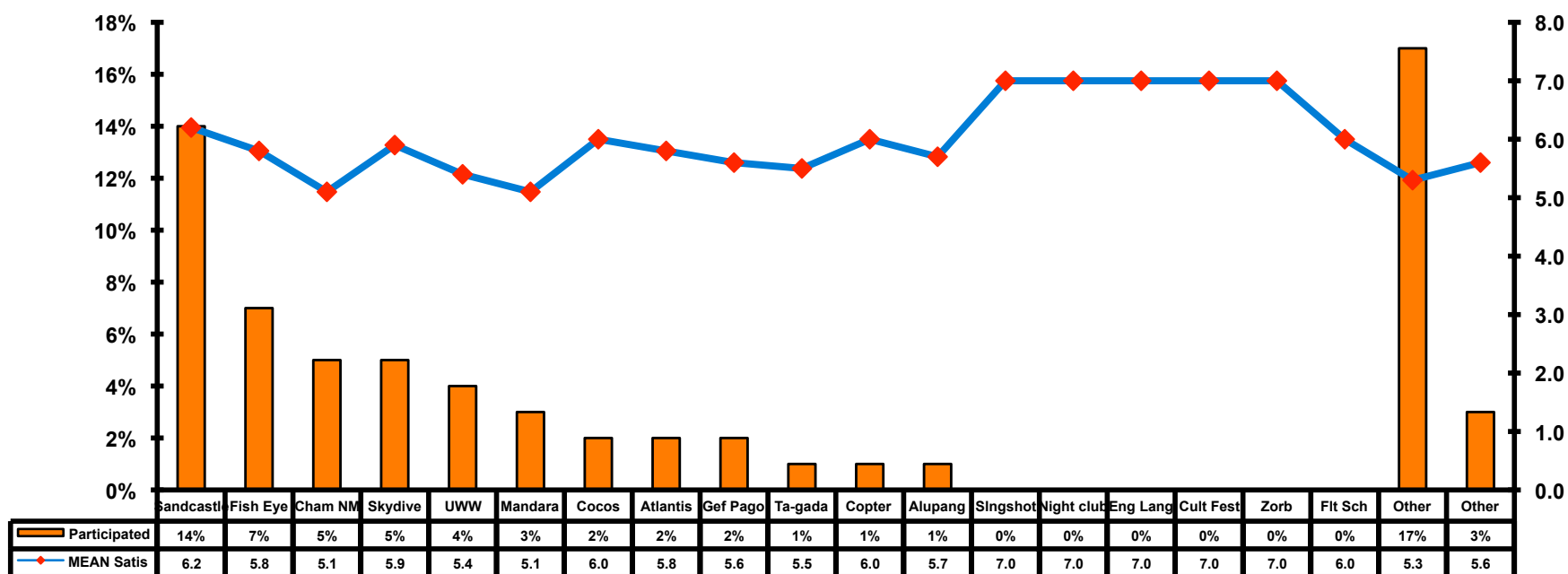
Optional Tour Participation

- 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 = 42%	Score of 6 to 7 = 36%
Score of 4 to 5 = 50%	Score of 4 to 5 = 53%
Score 1 to 3 = 6%	Score 1 to 3 = 11%
MEAN = 5.1	MEAN = 4.8

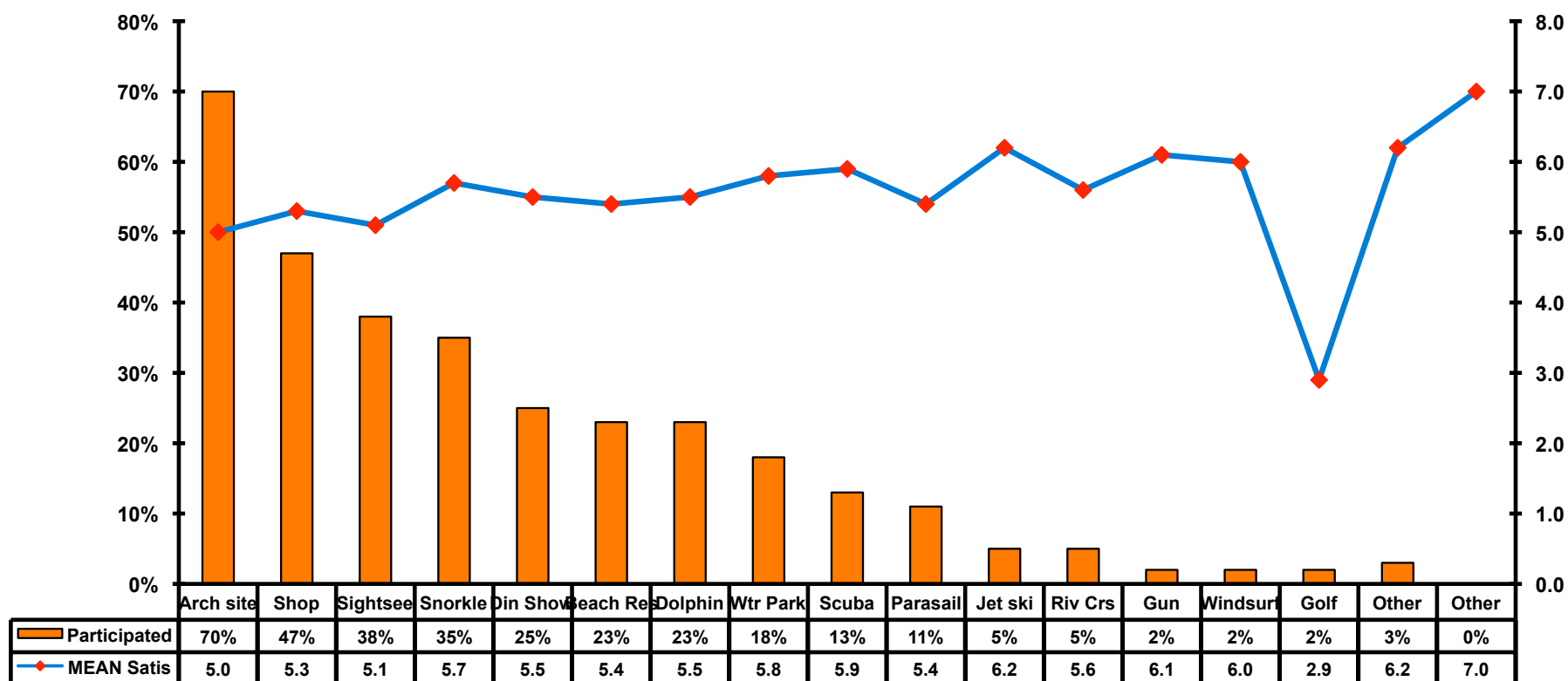
Night Tours Satisfaction

7pt Rating Scale

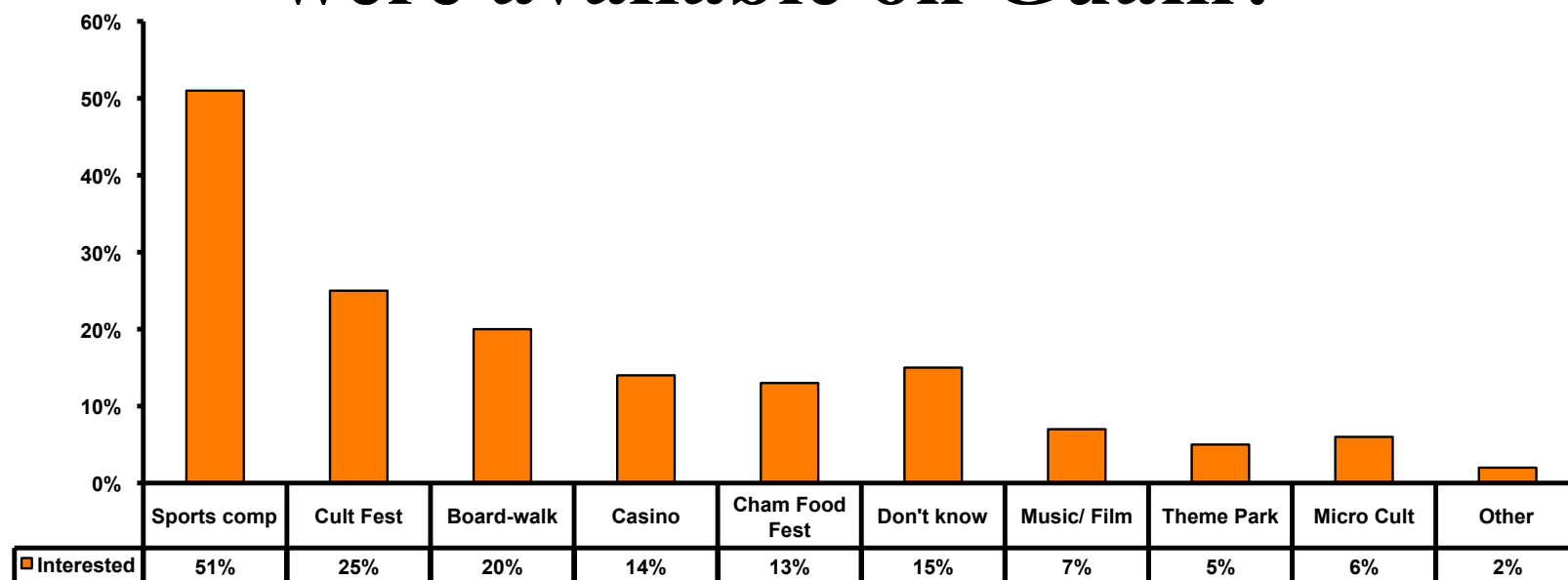
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 27%	Score of 6 to 7 = 25%
Score of 4 to 5 = 58%	Score of 4 to 5 = 58%
Score 1 to 3 = 14%	Score 1 to 3 = 17%
MEAN = 4.6	MEAN = 4.5

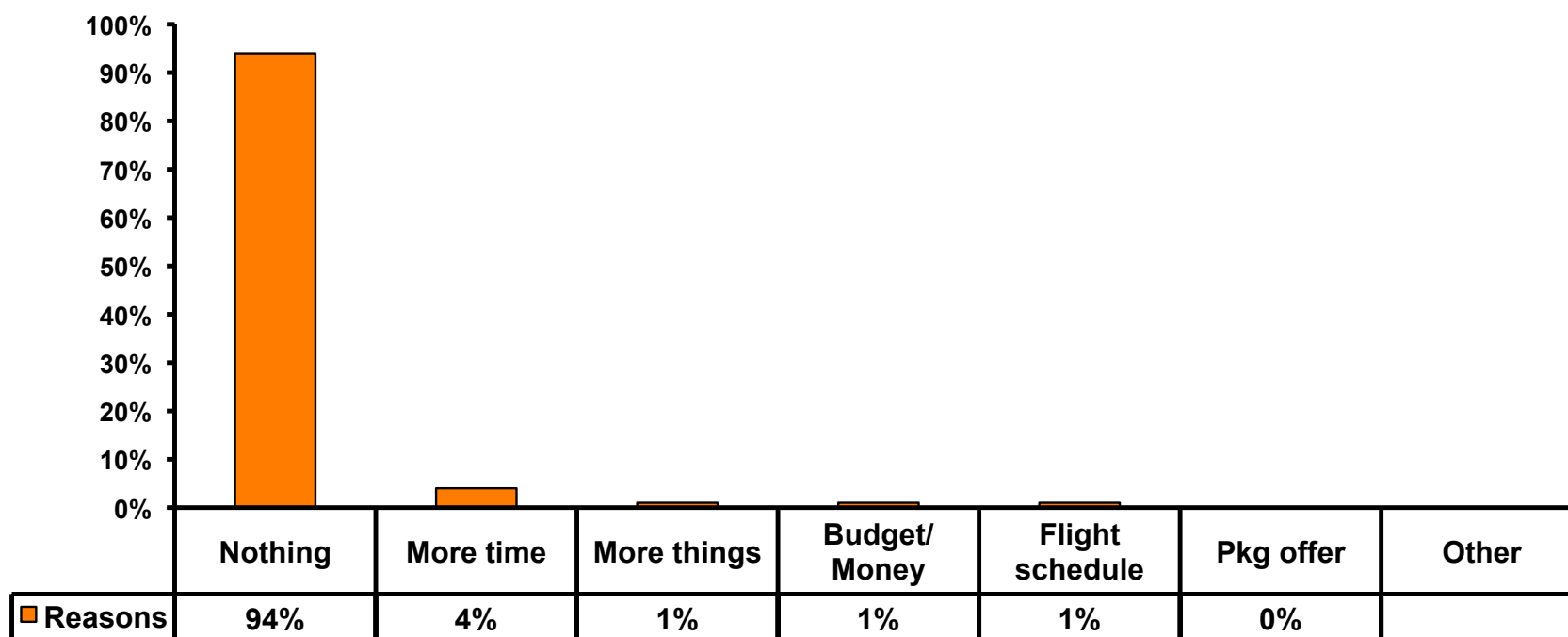
Satisfaction with Other Activities



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



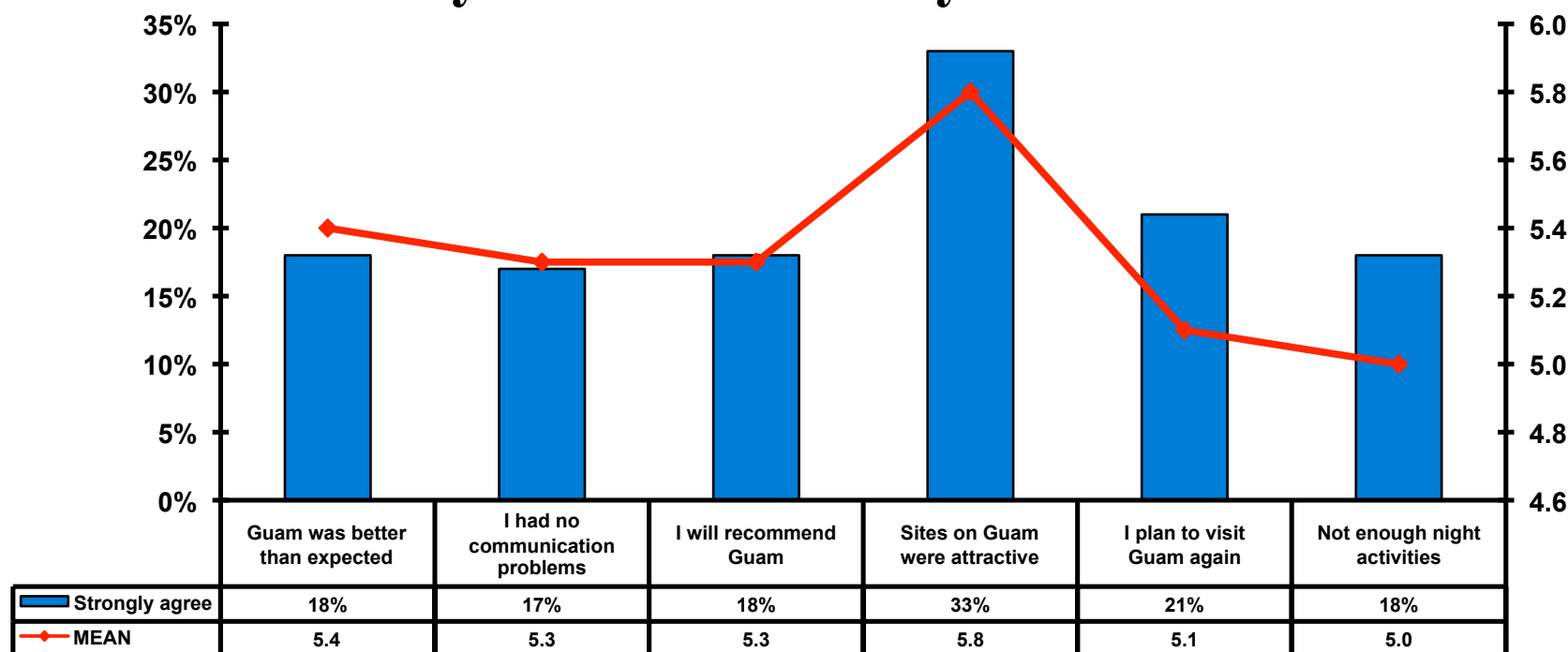
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

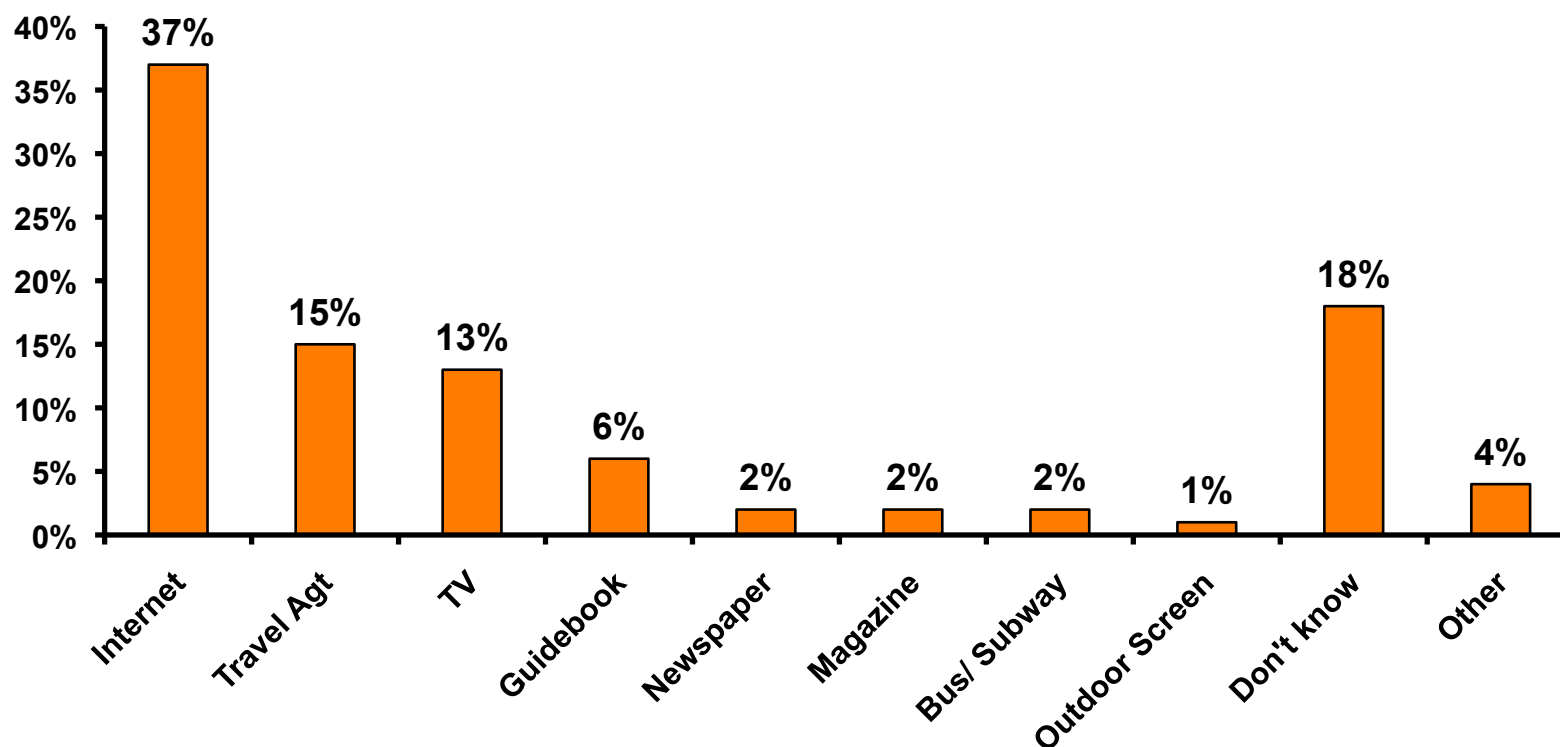
7=Very Satisfied/ 1=Very Dissatisfied



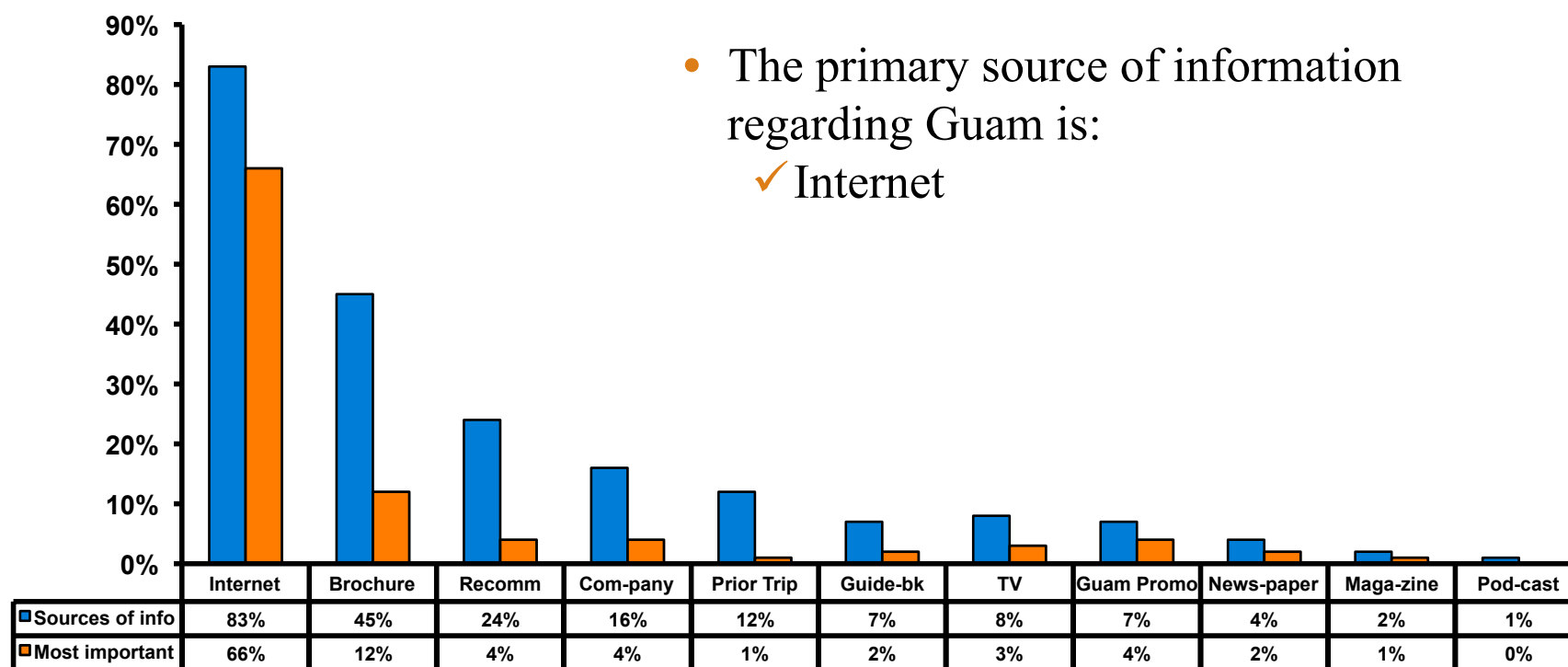
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

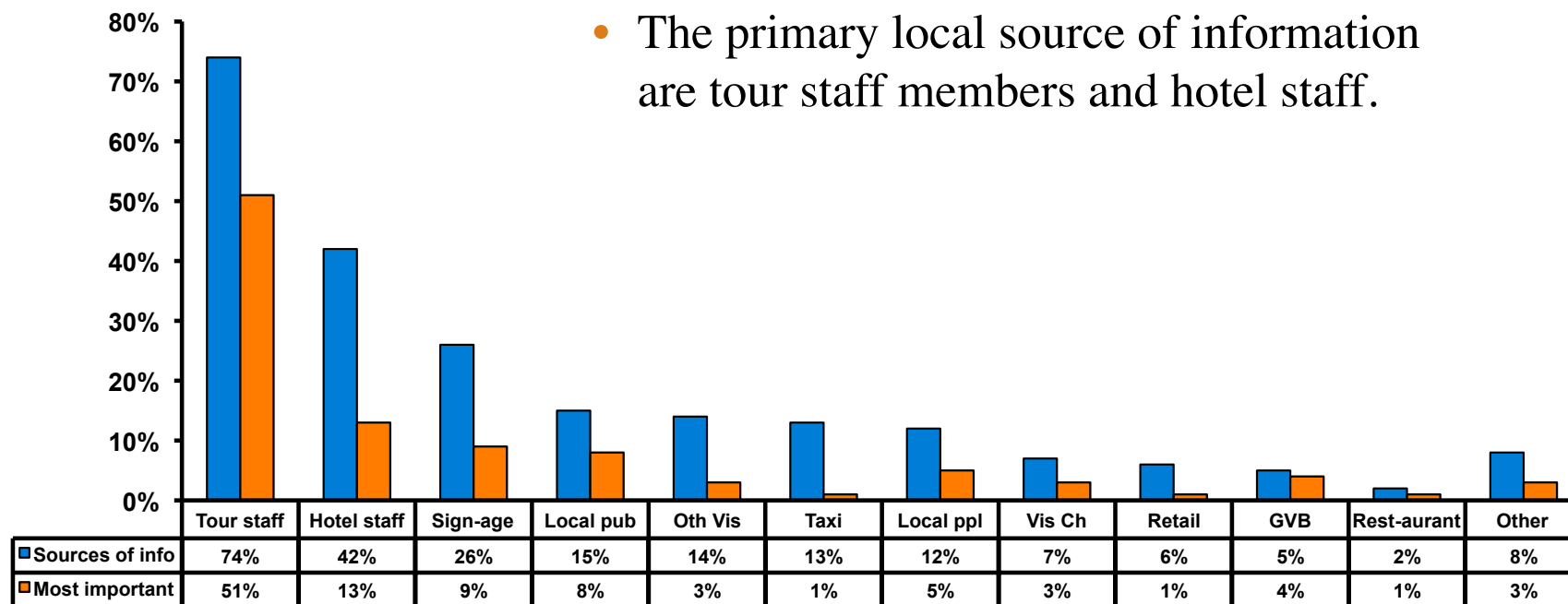


Sources of Information Pre-arrival



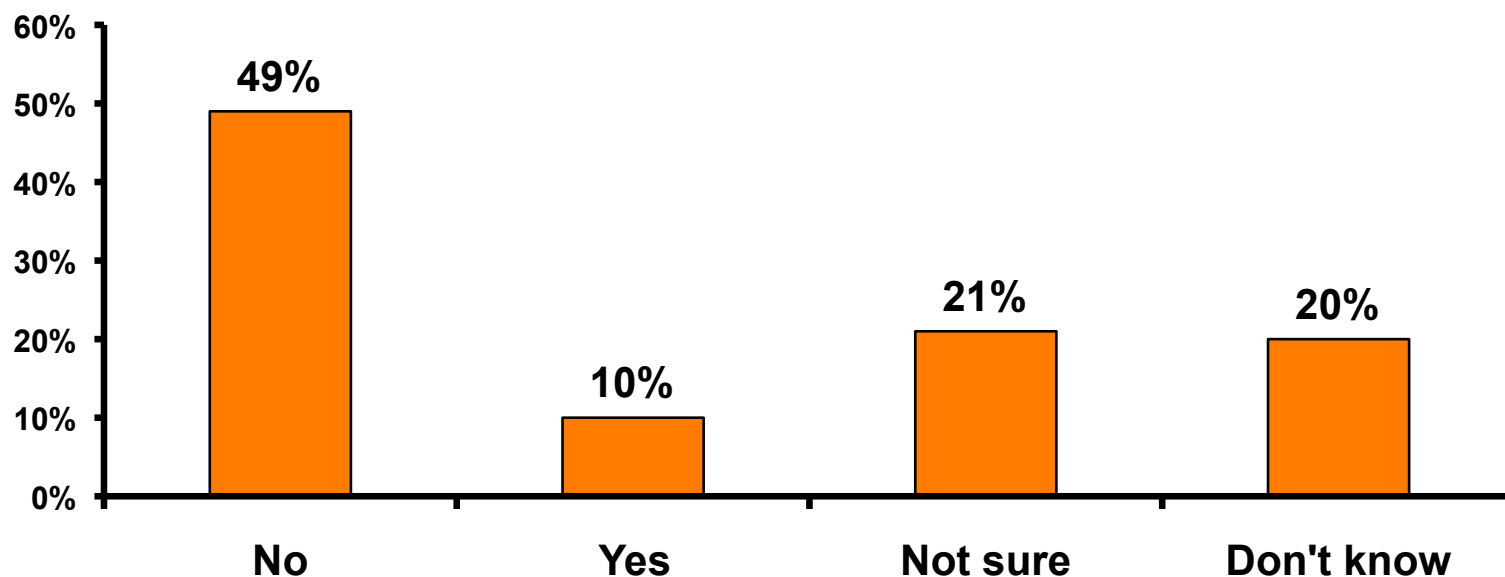
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

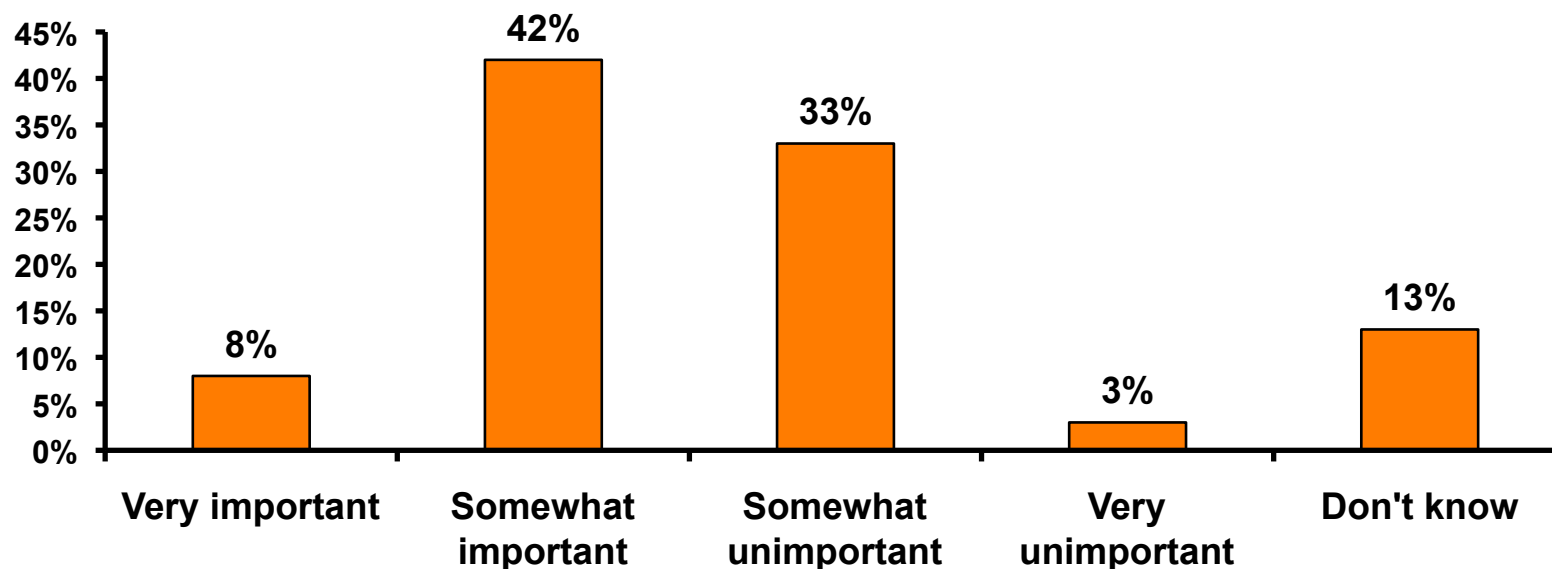
Good time to spend money on travel outside of Korea - Overall



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.21	Conditions have worsened		32%	41%	44%	33%	32%	41%	40%	43%	29%
	Conditions have remained the same		34%	41%	38%	20%	39%	36%	40%	36%	43%
	Conditions have improved		15%	3%	4%	20%	5%	5%	6%	9%	
	Do not know	100%	18%	16%	14%	27%	24%	18%	13%	12%	29%
Total	Count	1	71	186	79	15	38	118	82	91	7

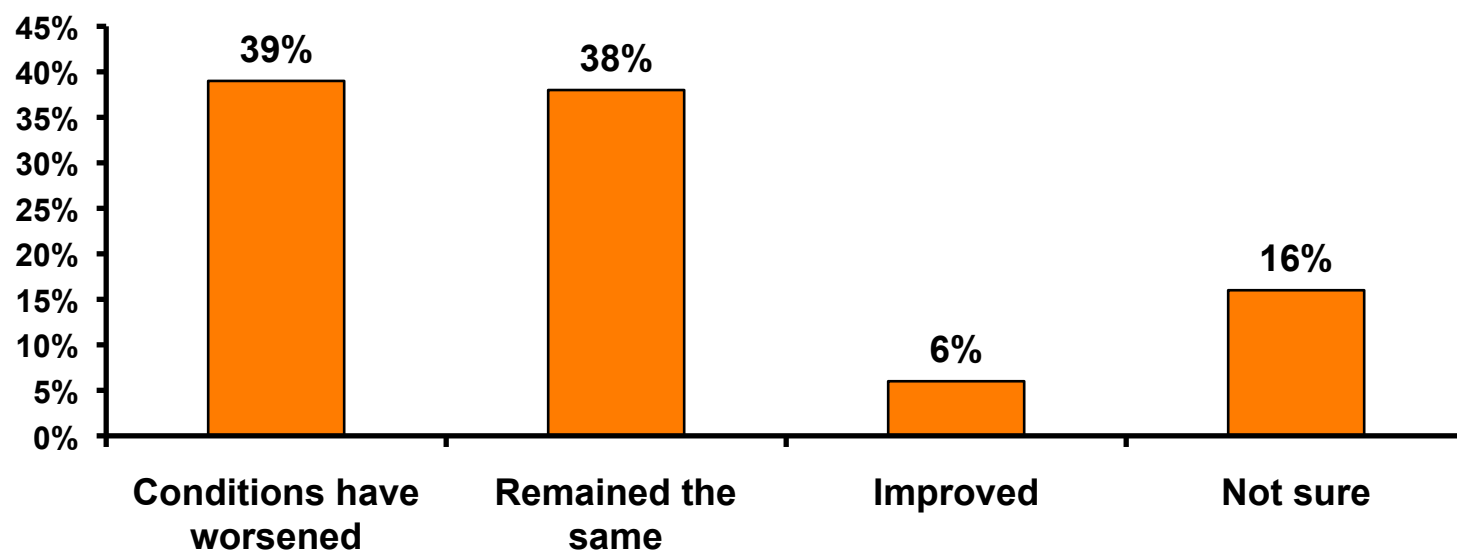
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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		4%	2%	5%		5%	3%	1%	4%	
	Somewhat unimportant		28%	35%	35%	33%	37%	34%	28%	41%	14%
	Somewhat important	100%	48%	41%	38%	53%	32%	40%	49%	43%	29%
	Very important		6%	9%	9%	7%	11%	8%	7%	8%	14%
	Don't know		14%	13%	13%	7%	16%	15%	14%	4%	43%
Total	Count	1	71	186	78	15	38	118	81	91	7

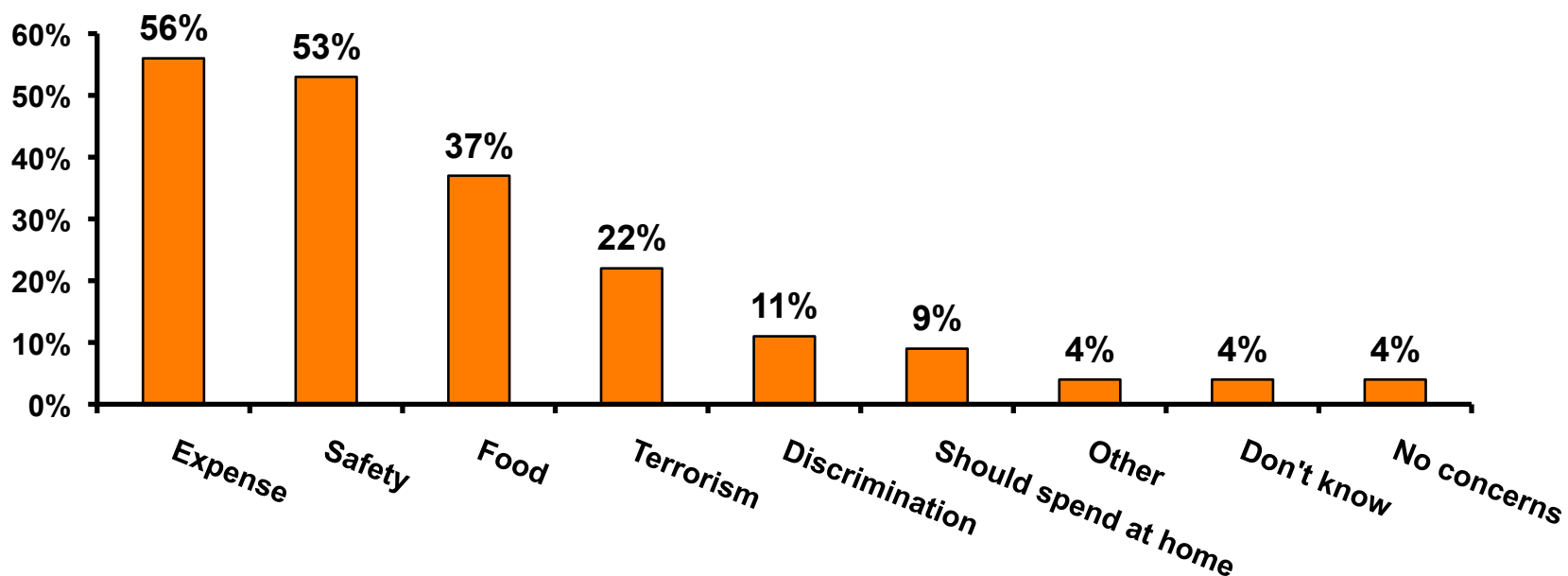
Rating Korean Economy Compared to 12 months ago



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		32%	41%	44%	33%	32%	41%	40%	43%	29%
	Conditions have remained the same		34%	41%	38%	20%	39%	36%	40%	36%	43%
	Conditions have improved		15%	3%	4%	20%	5%	5%	6%	9%	
	Do not know	100%	18%	16%	14%	27%	24%	18%	13%	12%	29%
Total	Count	1	71	186	79	15	38	118	82	91	7

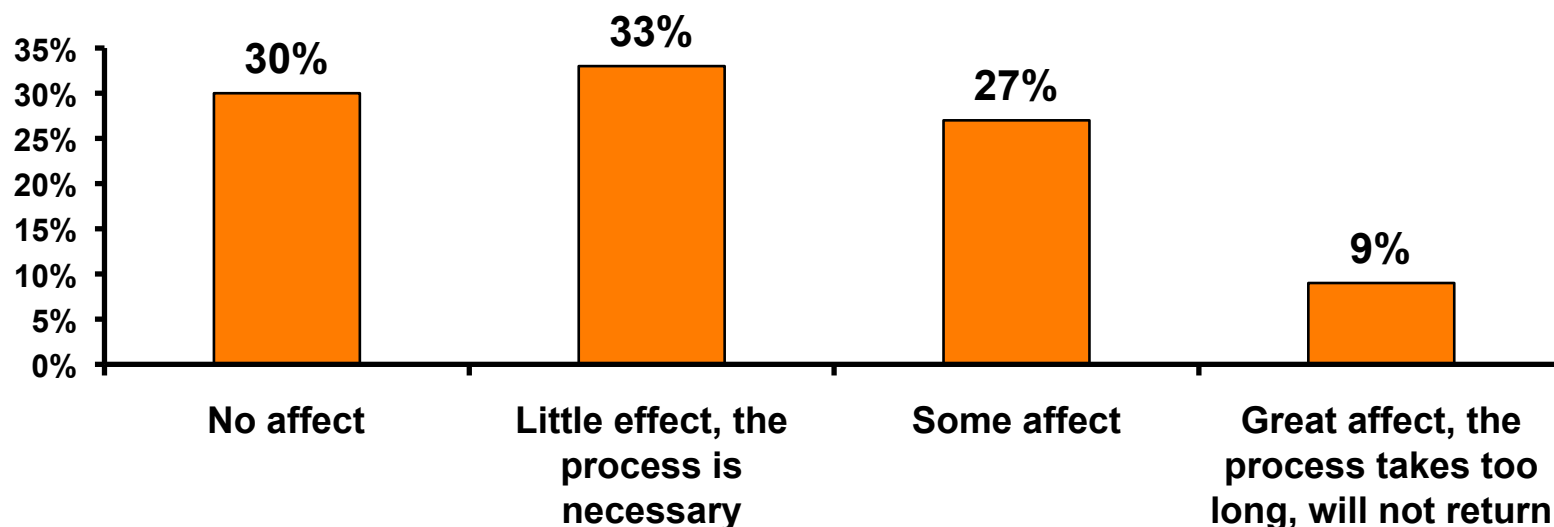
Concerns about travel outside of Korea - Overall



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	Expense	100%	61%	55%	54%	60%	68%	60%	55%	48%	43%
	Safety at my destination		57%	56%	46%	53%	43%	50%	65%	54%	43%
	Food	100%	37%	40%	31%	27%	24%	37%	43%	37%	43%
	Terrorism		26%	21%	22%	20%	22%	18%	18%	29%	43%
	Spending money abroad when it should be spent at home		9%	9%	9%	20%	8%	11%	11%	7%	1.4%
	Other		1%	4%	9%		3%	5%	5%	4%	
	Do not know		7%	5%		7%	5%	4%	7%	2%	
	No concerns		1%	4%	4%	7%	8%	3%	4%	3%	1.4%
Total	Cases	1	70	185	78	15	37	118	82	90	7

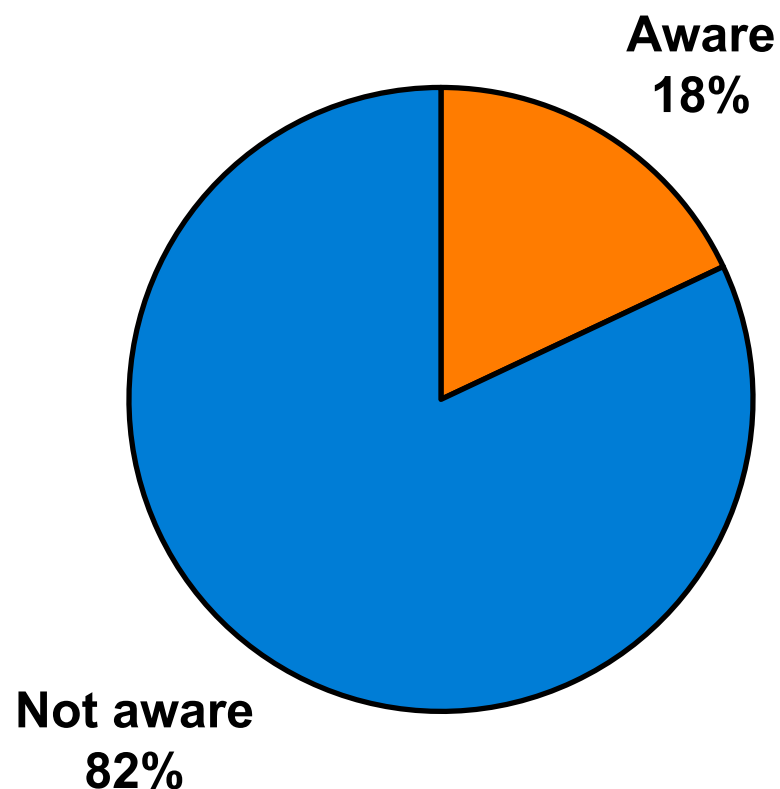
Security Screening/ Immigration Process at Guam International Airport



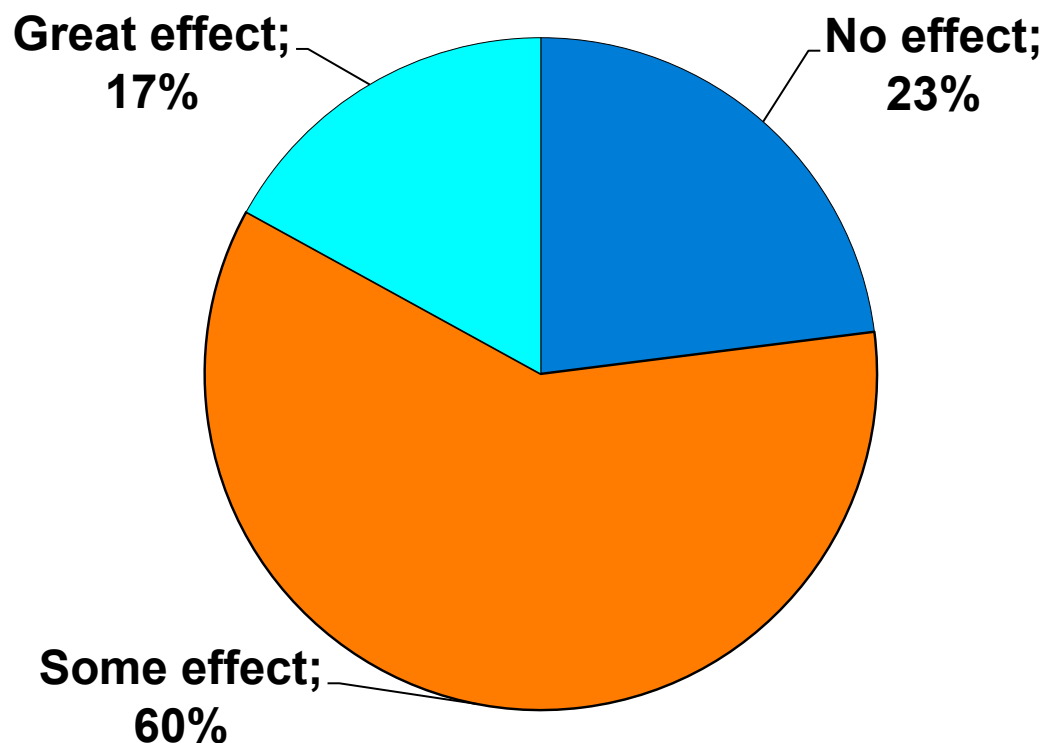
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.1** out of possible 7.0
- Agree (Score 6-7) – **8%**
- Neutral (Score 4-5) – **41%**
- Disagree (Score 1-3) – **51%**

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



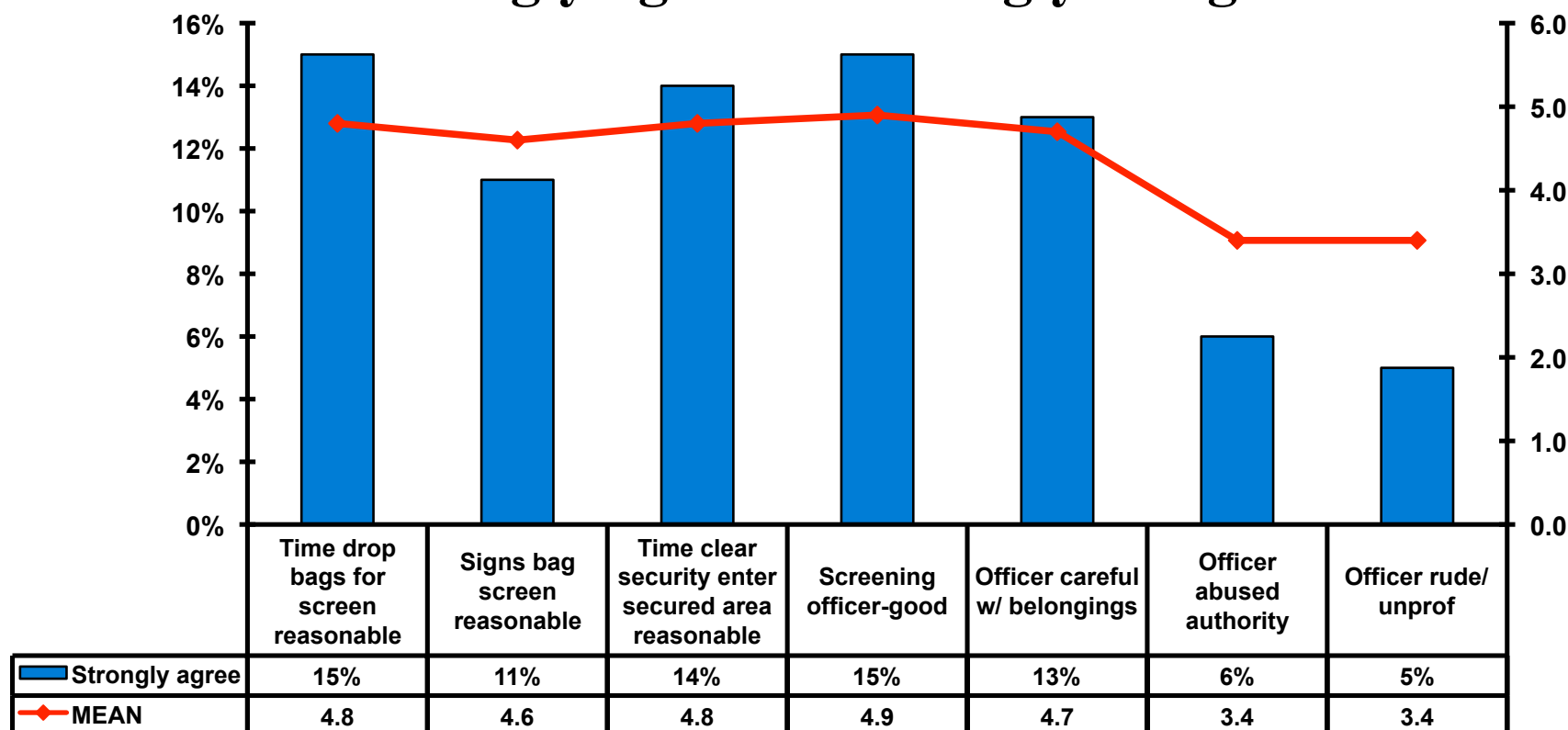
Effects of US military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

