



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

MARCH 2011



Prepared by: QMark Research

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Background & Methodology

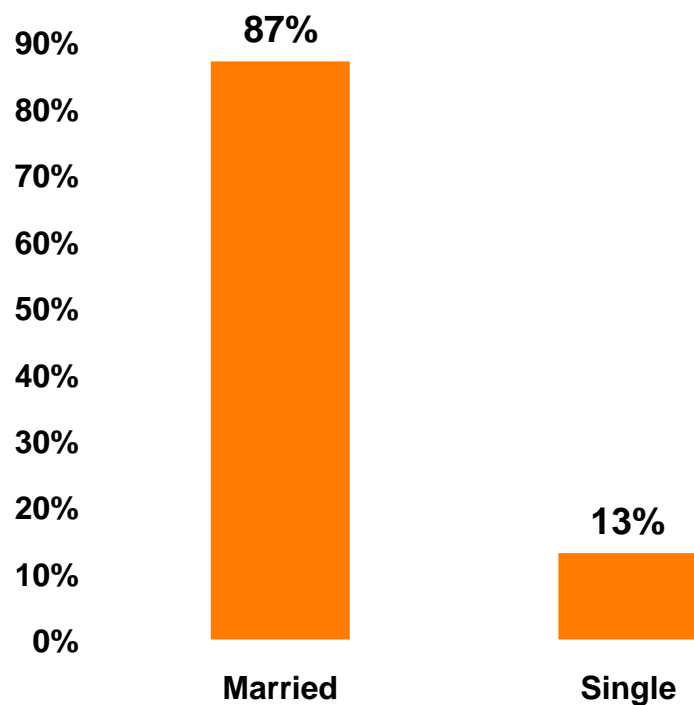
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing Korean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

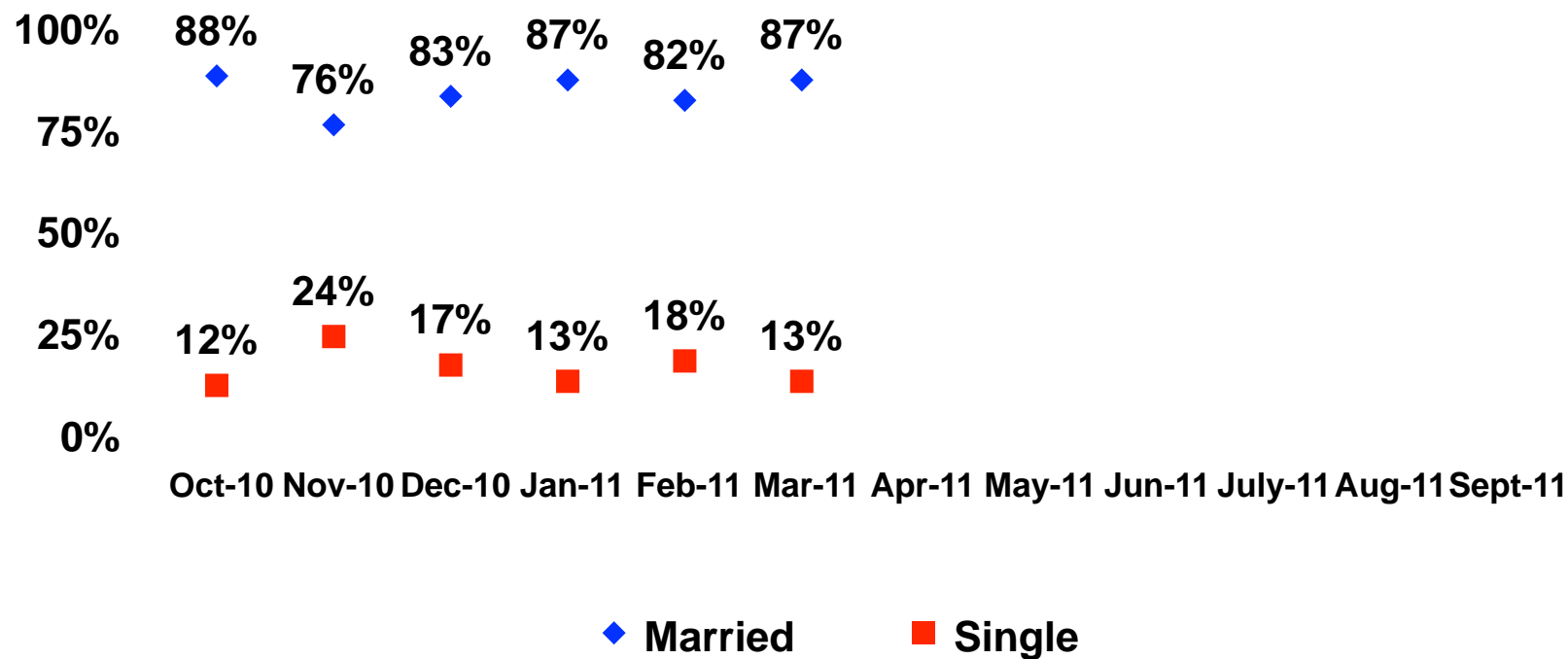
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

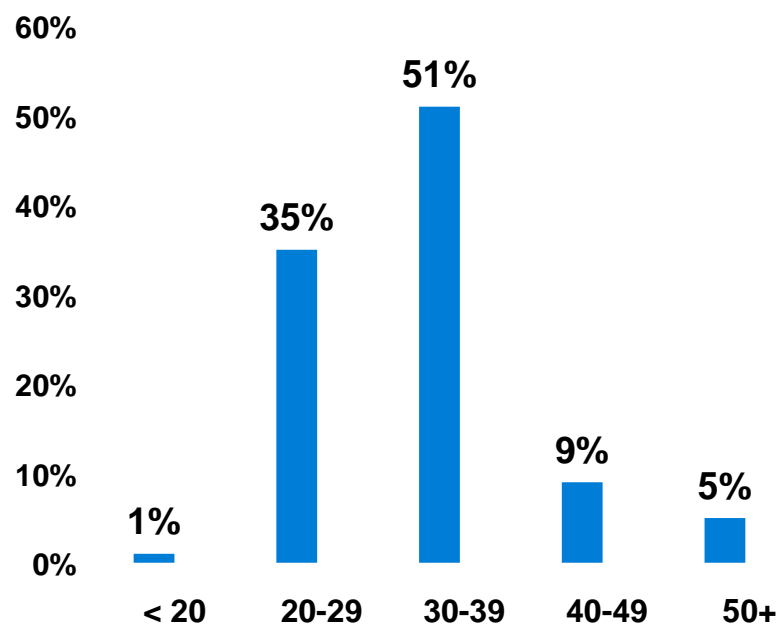


- A majority of visitors are married.

Marital Status

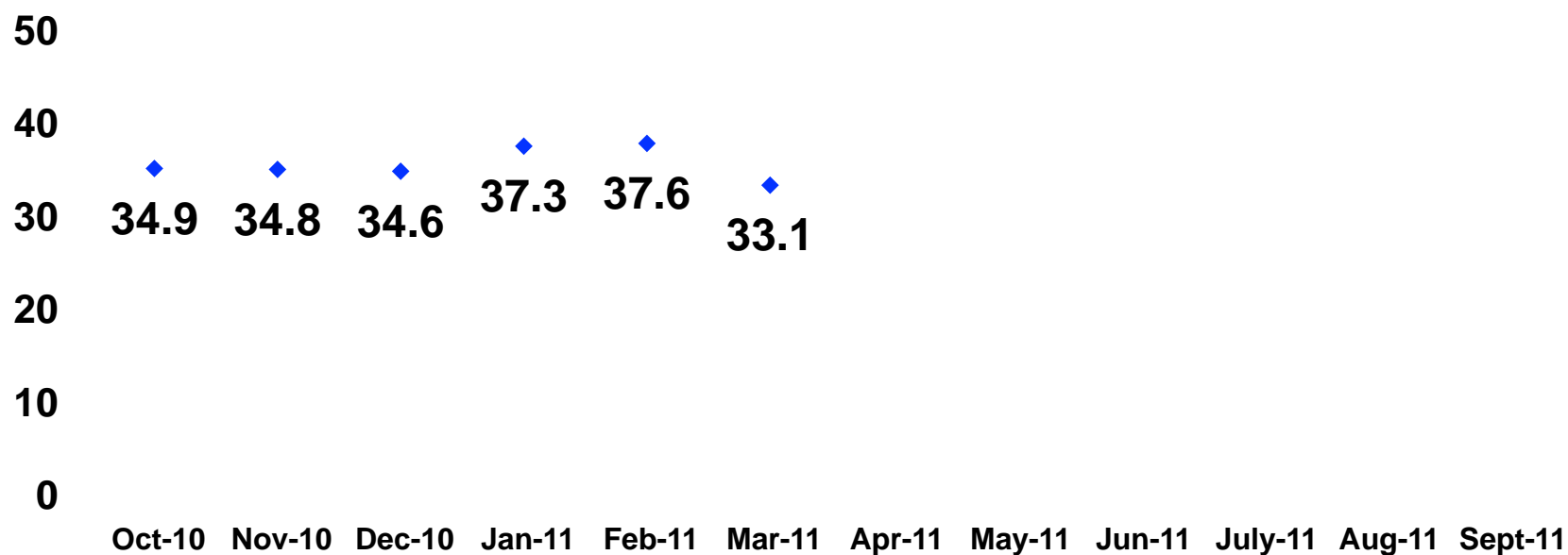


Age - Overall

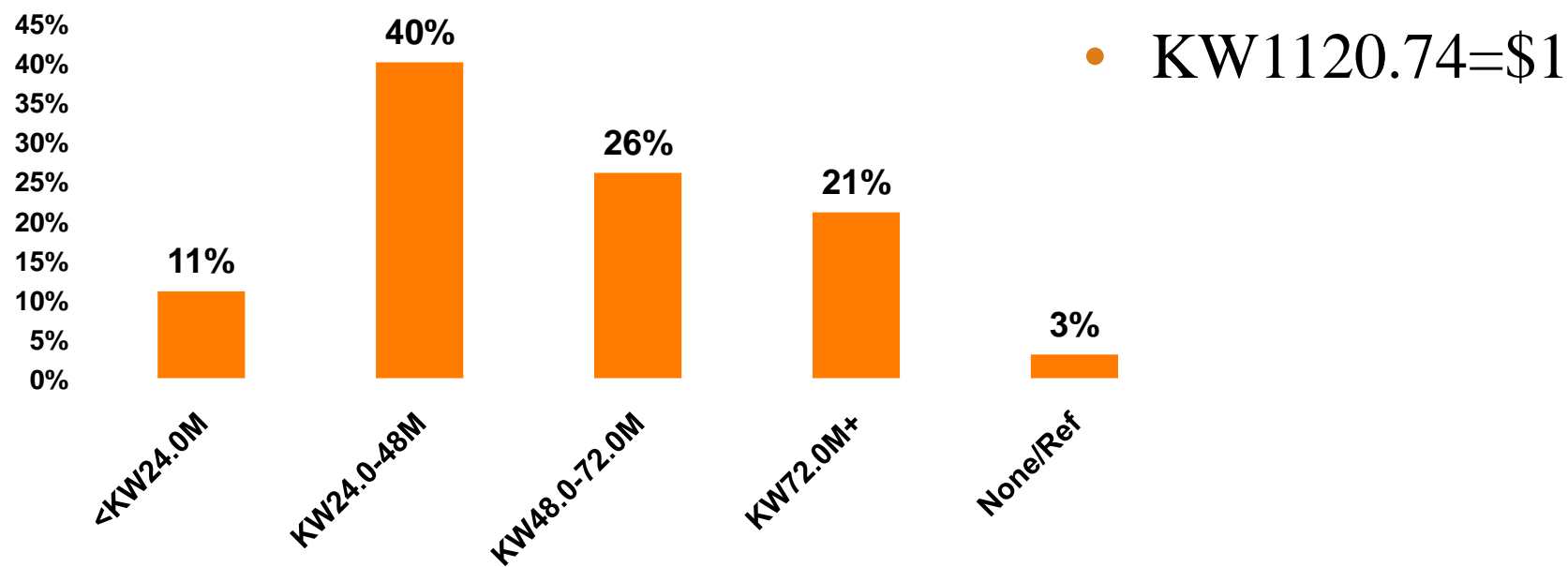


- The average age of the respondents is 33.1 years of age.

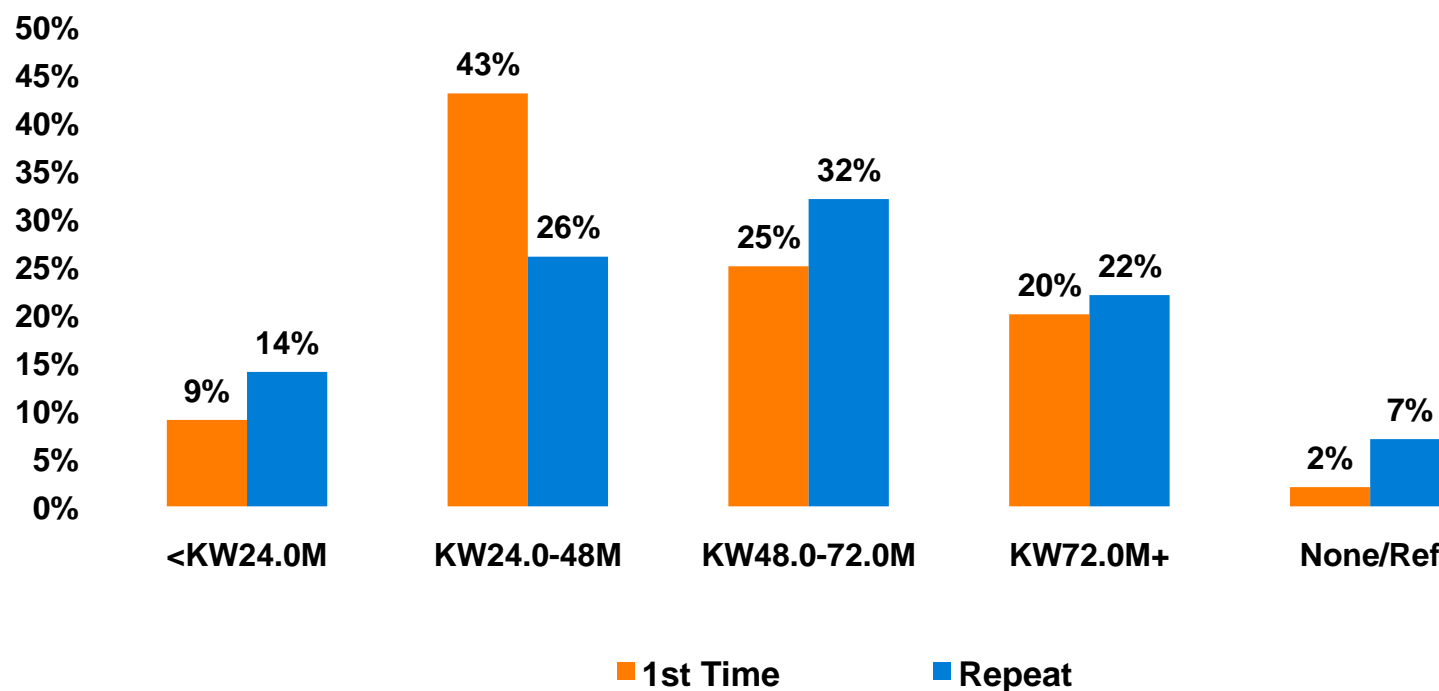
Average Age



Personal Income



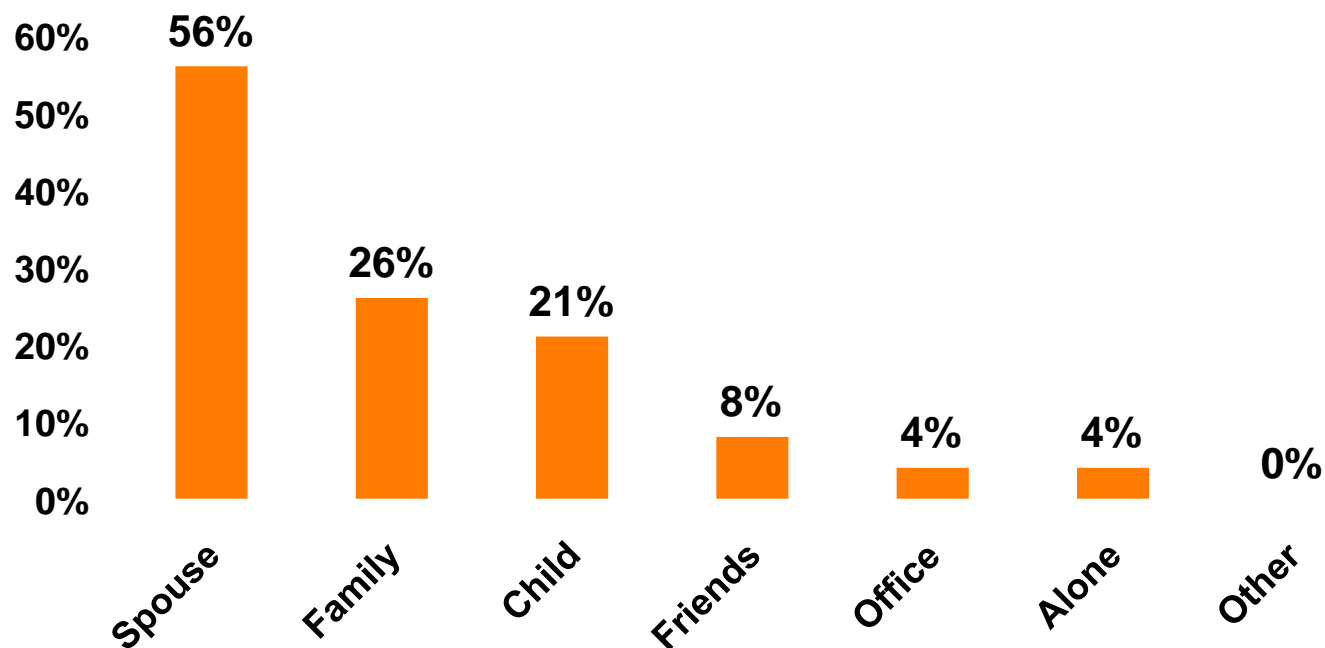
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	36	14	22		21	14		1
			10%	8%	13%		18%	8%		6%
	KW24.0M-KW48.0M	Count	138	64	74		56	72	3	7
			40%	37%	43%		48%	40%	10%	44%
	KW48.0M-KW72.0M	Count	89	46	43		23	49	15	2
			26%	27%	25%		20%	28%	48%	13%
	KW72.0M+	Count	71	46	25	1	14	37	13	6
			21%	27%	15%	50%	12%	21%	42%	38%
	Refused	Count	10	3	7	1	3	6		
			3%	2%	4%	50%	3%	3%		
Total	Count	344	173	171	2	117	178	31	16	

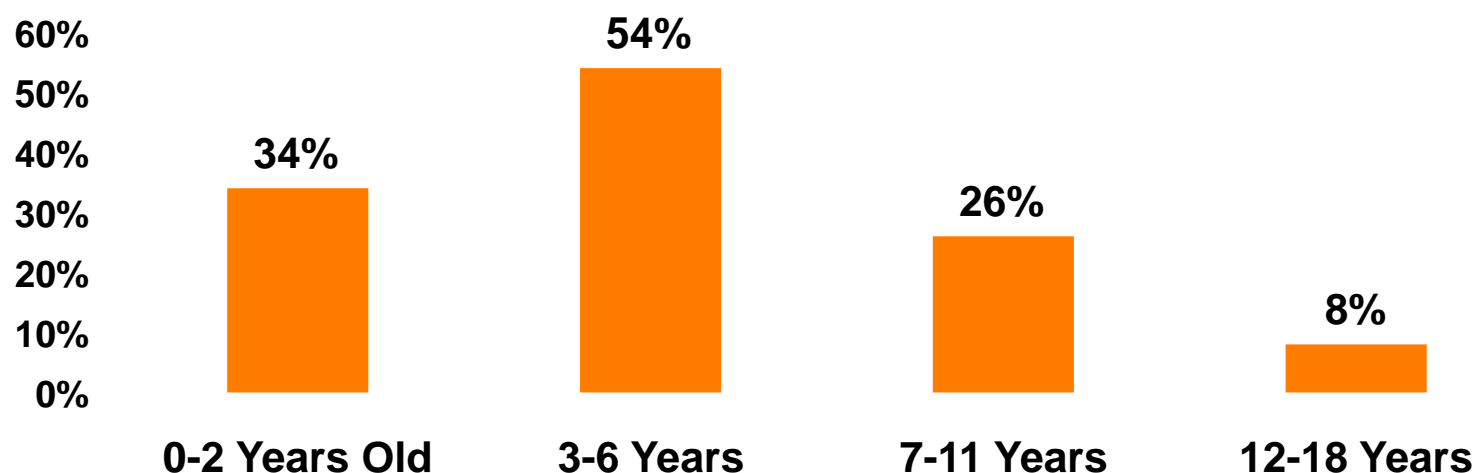
Travel Companions



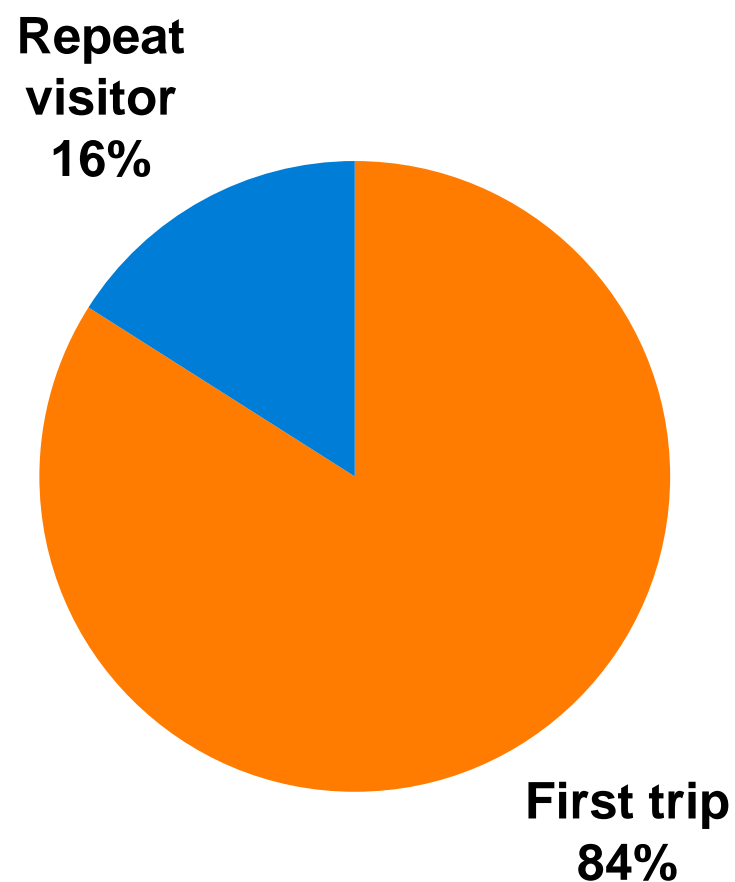
Number of Children Travel Party

N=74 total respondents traveling with children.

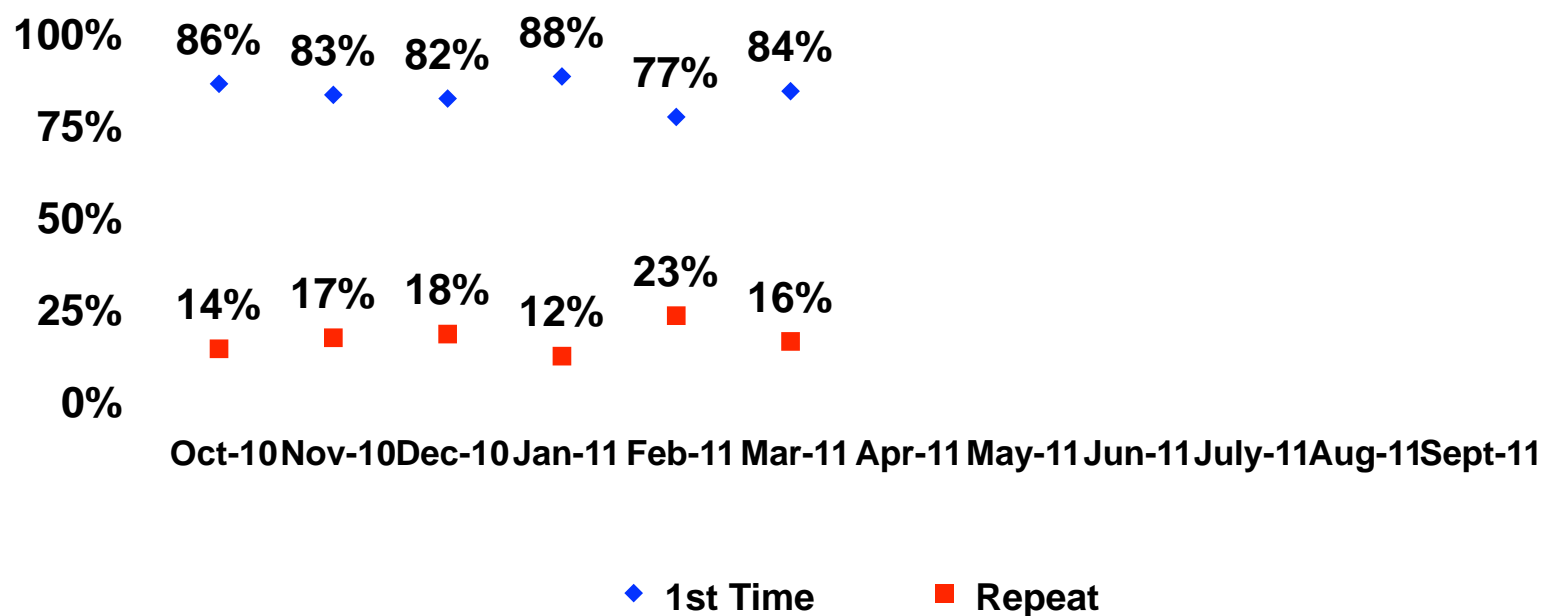
(Of those N=74 respondents, there is a total of 108 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



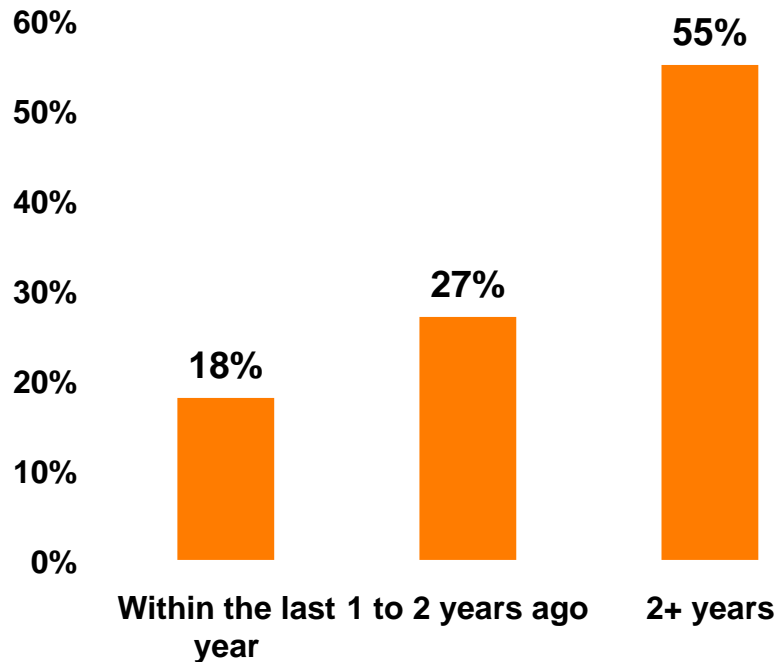
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
				1st	Repeat	
GENDER	Male	Count	177	153	24	
			50%	52%	41%	
	Female	Count	176	142	34	
			50%	48%	59%	
Total	Count		353	295	58	
AGE	<20	Count	2	1	1	
			1%	0%	2%	
	20-29	Count	122	112	10	
			35%	38%	17%	
	30-39	Count	181	151	30	
			51%	51%	52%	
	40-49	Count	31	19	12	
			9%	6%	21%	
	50+	Count	17	12	5	
			5%	4%	9%	
	Total	Count		353	295	58

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

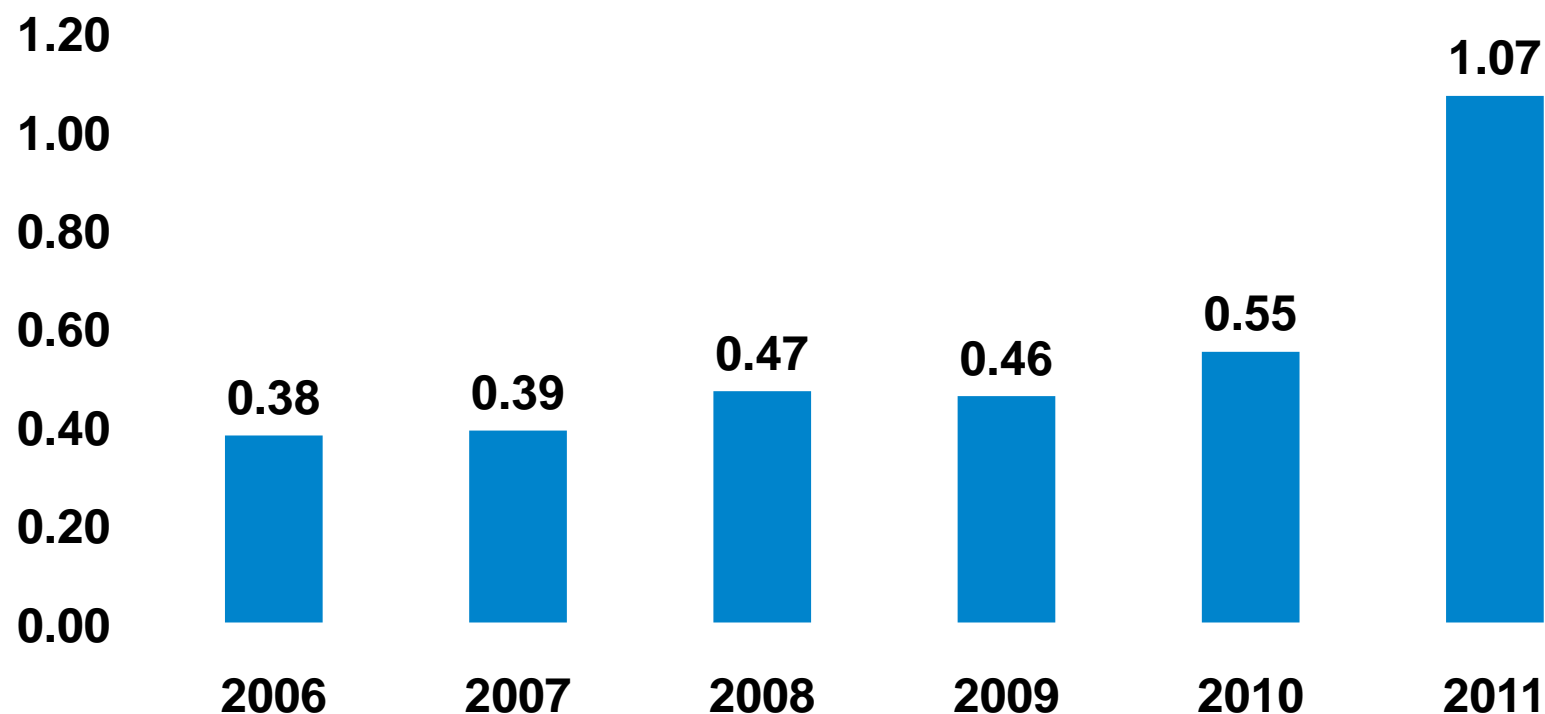
Repeat Visitors Last Trip

n = 56

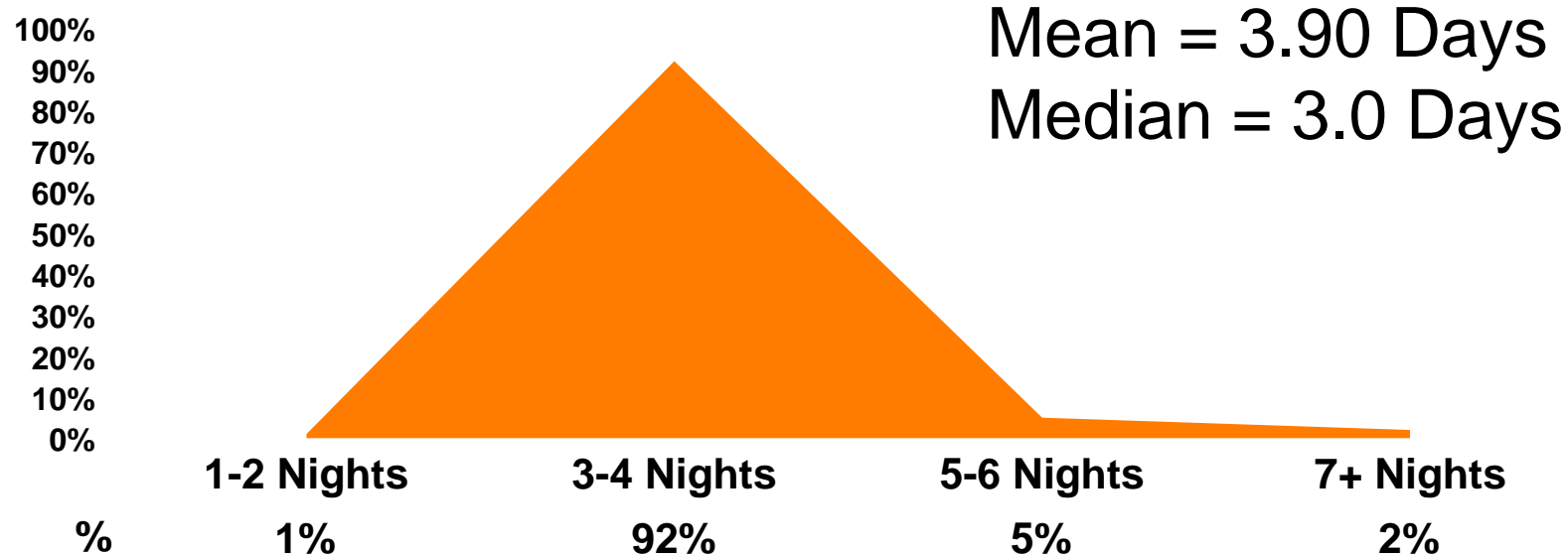


- The average repeat visitor has been to Guam 2.4 times.
- Roughly half of the repeat visitors have been to Guam within the last 2 years.

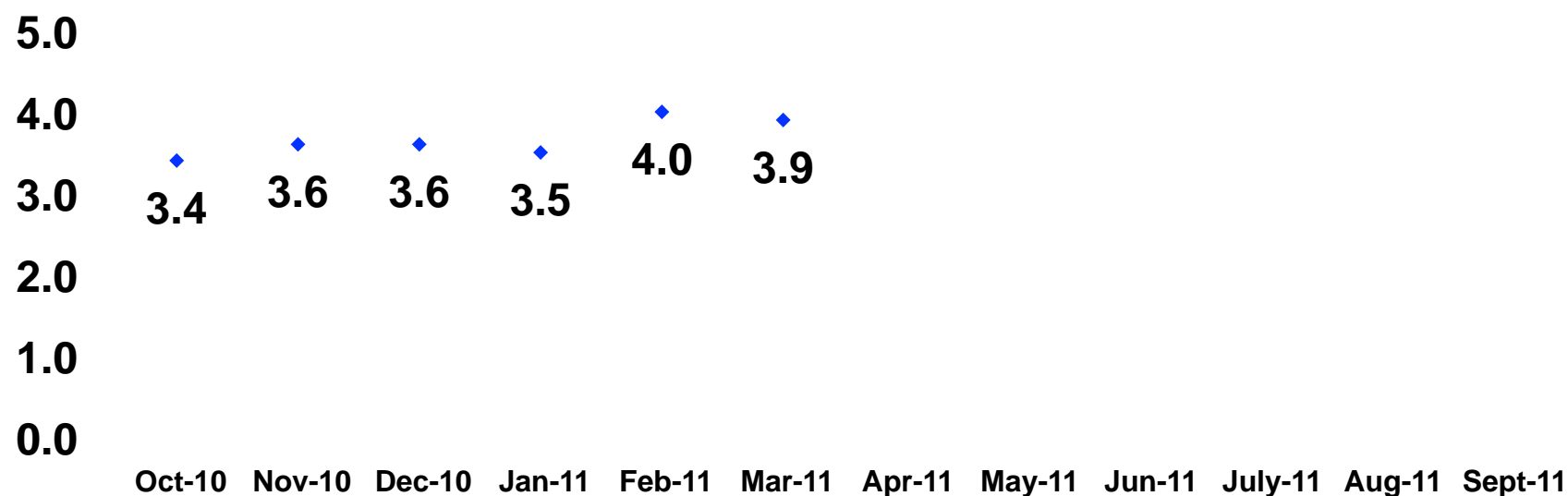
Average Number Overnight Trips (2005-2011) (2 nights or more)



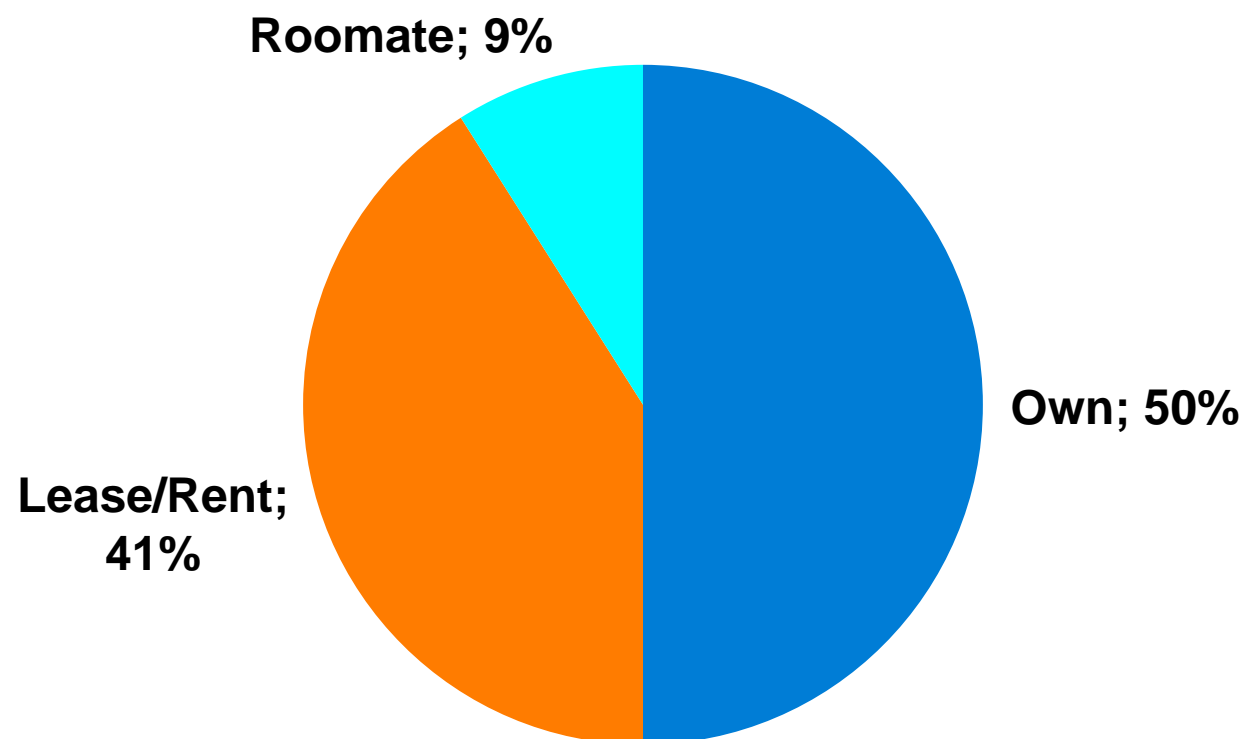
Length of Stay



Average Length of Stay



Living Accommodations

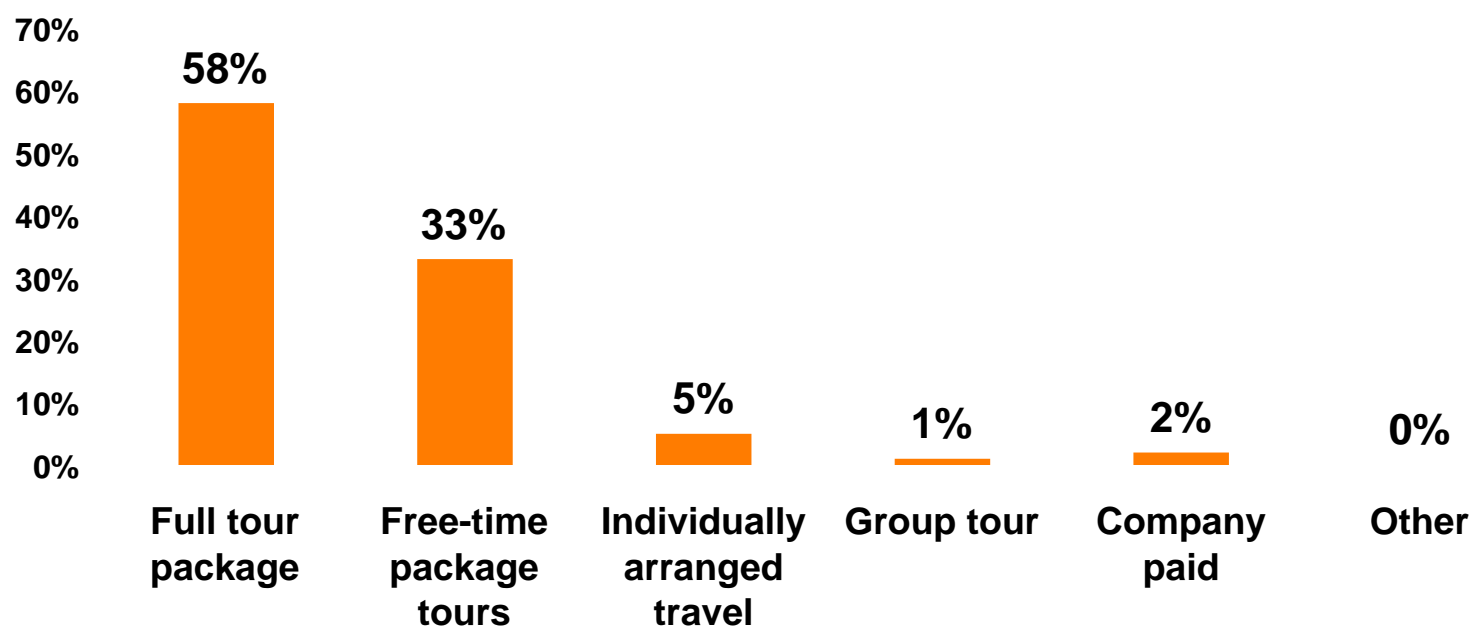


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	29%	14%	35%	35%	26%	
	Self-employed	14%	11%	9%	22%	14%	10%
	Prof/Specialist/Tech	13%	14%	12%	15%	17%	
	Homemaker	12%	8%	9%	12%	16%	30%
	Service worker	6%	14%	9%	1%	4%	
	Manager	3%	3%	3%	1%	7%	
	Professor/Teacher	3%	14%	2%	2%	1%	
	Skilled worker	3%	6%	3%	1%	4%	
	Student	3%	6%	1%		3%	40%
	Other	3%	6%	4%	1%	1%	10%
	Sales/Clerical	2%		2%	2%	1%	
	Govt - Office/non-mgr	2%		2%	3%		
	Govt-Mgr	1%	3%	1%		1%	
	Govt-Exec	1%		2%		1%	
	Unemployed	1%		1%			10%
	Retired	1%	3%	1%			
	Judicial	1%		1%	1%	1%	
	Free-lancer	1%		1%	2%		
Total	Count	351	36	137	89	70	10

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

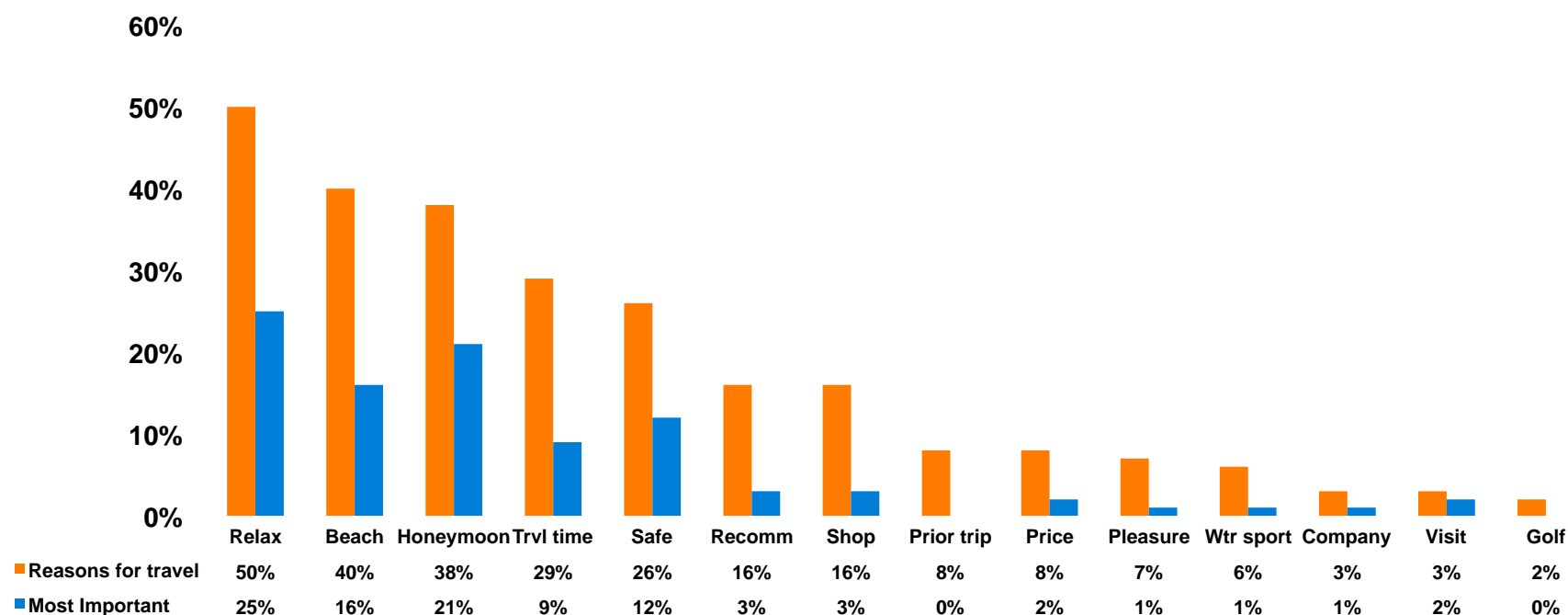


Accommodation by Income

Average length of stay: 3.90 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	43%	39%	37%	47%	49%	40%
	Hyatt Regency Guam	22%	19%	28%	18%	17%	10%
	The Westin Resort Guam	9%	3%	10%	10%	8%	20%
	Outrigger Guam Resort	6%	6%	7%	6%	6%	
	Sheraton Laguna Resort	5%	11%	6%	5%	3%	
	Hilton Guam Resort & Spa	4%	11%	3%	2%	6%	10%
	Hotel Nikko Guam	3%	3%	2%	2%	6%	
	Onward Beach Resort	2%		2%	3%	1%	
	Relatives, Friends, Home Stay	1%	3%	1%	1%		10%
	Leo Palace Resort	1%	6%	1%		1%	
	Holiday Resort Guam	1%		1%			
	Bayview Hotel	1%		1%			10%
	Royal Orchid Guam	1%			2%		
	Condominium	1%		1%	1%		
	Guam Marriott Resort Hotel	0%			1%		
	Other	0%				1%	
	Fiesta Resort Guam	0%			1%		
	Hotel Sane Fe	0%				1%	
Total	Count	352	36	138	88	71	10

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
 - Honeymoon and
 - Guam's natural beauty/beaches
- 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	50%		40%	56%	55%	65%	47%	54%
	Beautiful seas, beaches, tropical climate	40%		31%	44%	48%	53%	37%	43%
	Honeymoon	38%		61%	33%	6%		43%	34%
	Short travel time	29%		30%	30%	26%	18%	23%	35%
	It is a safe place to spend a vacation	26%		18%	28%	48%	35%	25%	28%
	Recommendation of friend, relative, travel agency	16%		14%	20%	16%		12%	20%
	Shopping	16%		13%	20%	10%	12%	13%	19%
	A previous visit	8%		3%	9%	23%	12%	6%	10%
	Price of the tour package	8%		5%	10%	10%		7%	8%
	Pleasure	7%		2%	11%		24%	6%	9%
	Water sports	6%		6%	4%	10%	18%	7%	5%
	My company sponsored me	3%		1%	3%	10%	18%	5%	2%
	Other	3%		2%	4%			3%	3%
	To visit friends or relatives	3%		3%	2%	3%		2%	3%
	To golf	2%			3%	3%	6%	3%	1%
	Company or Business trip	2%			2%	6%	18%	4%	1%
	SCUBA diving	2%		2%	2%			2%	2%
	Organized Sporting Activity	2%		2%	2%		6%	2%	2%
	Promotional materials from GVB	1%		1%	2%	3%		2%	1%
	Career certification or testing	1%	100%	1%				1%	1%
	To get married or Attend wedding	1%		2%	1%				2%
	Convention, Conference, Trade show	0%				3%		1%	
Total	Cases	353	2	122	181	31	17	177	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	50%	44%	43%	52%	66%	60%
	Beautiful seas, beaches, tropical climate	40%	19%	31%	51%	55%	30%
	Honeymoon	38%	56%	55%	29%	11%	10%
	Short travel time	29%	17%	32%	22%	41%	10%
	It is a safe place to spend a vacation	26%	14%	24%	33%	27%	30%
	Recommendation of friend, relative, travel agency	16%	17%	14%	16%	21%	10%
	Shopping	16%	14%	14%	17%	18%	20%
	A previous visit	8%	11%	7%	6%	14%	10%
	Price of the tour package	8%	8%	4%	12%	7%	
	Pleasure	7%	11%	6%	6%	13%	
	Water sports	6%	3%	5%	7%	8%	
	My company sponsored me	3%	3%	3%	3%	4%	
	Other	3%	3%	4%	1%	1%	
	To visit friends or relatives	3%	3%	1%	3%	1%	20%
	To golf	2%			6%	3%	10%
	Company or Business trip	2%		1%	7%	1%	
	Organized Sporting Activity	2%		3%	1%	1%	
	SCUBA diving	2%	6%	1%	1%		
	Promotional materials from GVB	1%		1%	1%	3%	
	Career certification or testing	1%	3%			1%	10%
	To get married or Attend wedding	1%		2%			
	Convention, Conference, Trade show	0%		1%			
Total	Cases	353	36	138	89	71	10

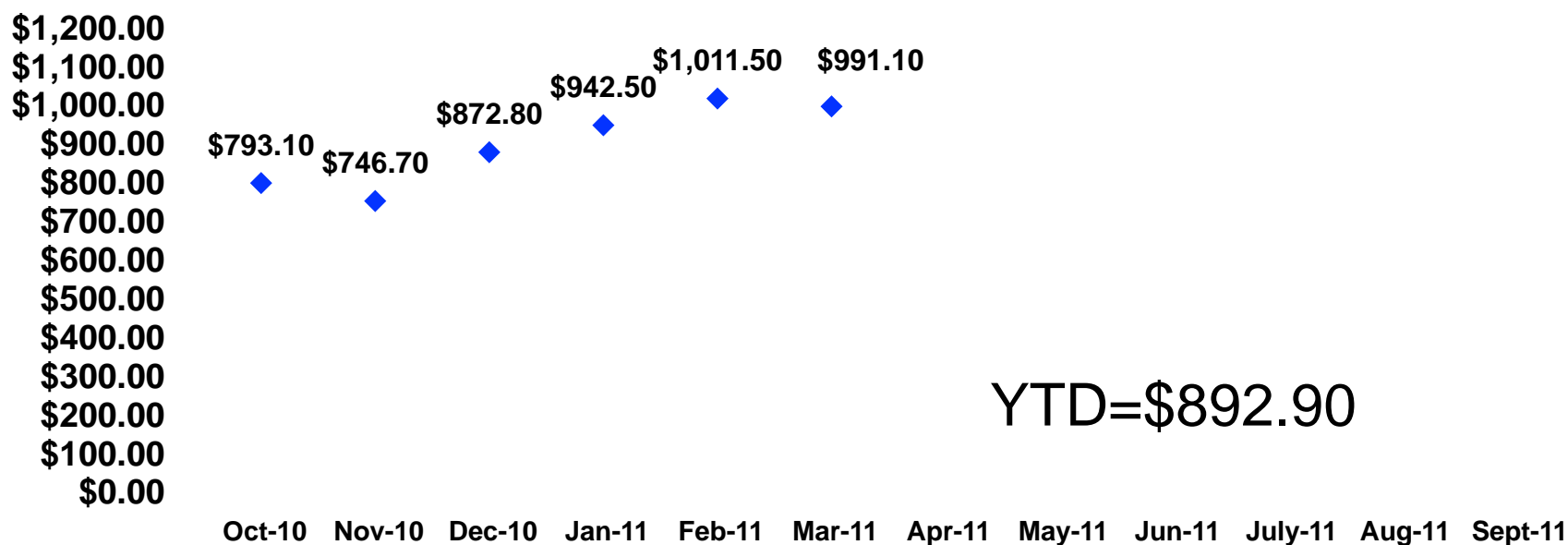
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1120.74/US\$1

- \$2,120.10 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$8,476 = maximum (highest amount recorded for the entire sample)
- \$991.10 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

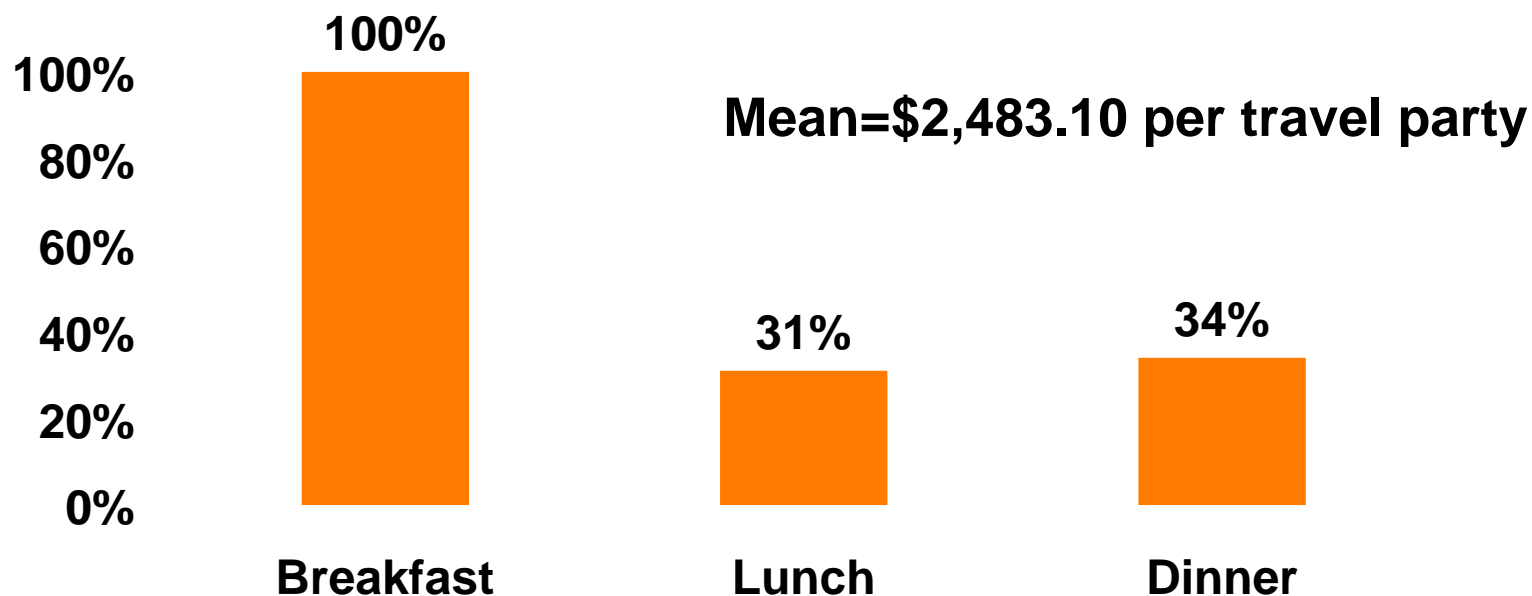
KW1120.74=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,053.80
Air & Accommodation w/ daily meal package	\$2,483.10
Air only	\$719.50
Accommodation only	\$742.00
Accommodation w/ daily meal only	\$870.00
Food & Beverages in Hotel	\$110.30
Ground transportation- Korea	\$93.40
Ground transportation- Guam	\$69.10
Optional tours/ activities	\$204.90
Other expenses	\$394.10
Total Prepaid	\$2,120.10

Prepaid Meal Breakdown

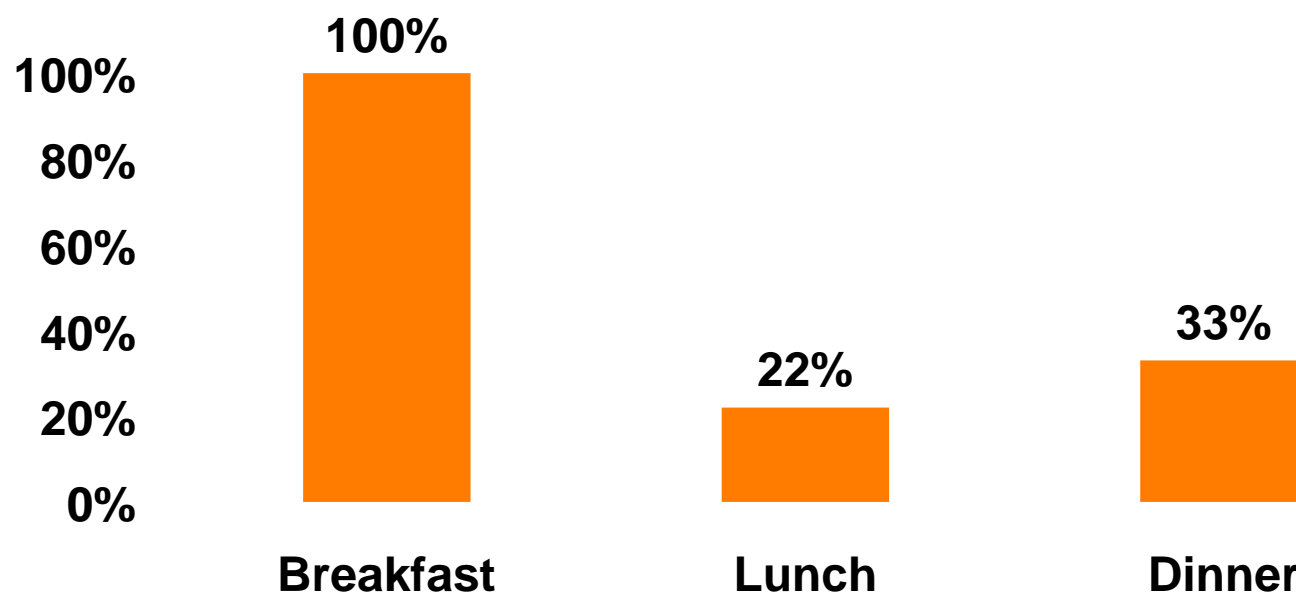
Air/ Accommodations with Daily Meal Package
n=210



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

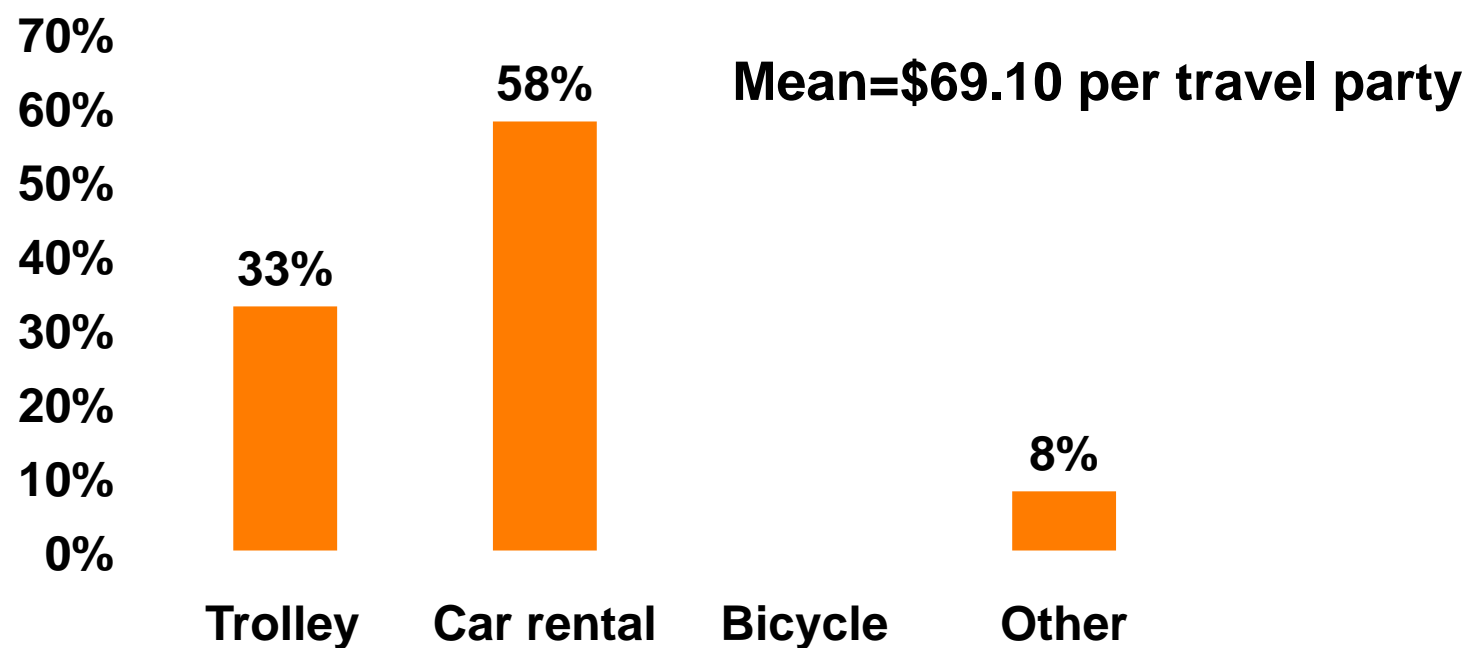
n= 9



Mean= \$870.00 per travel party

Prepaid Ground Transportation

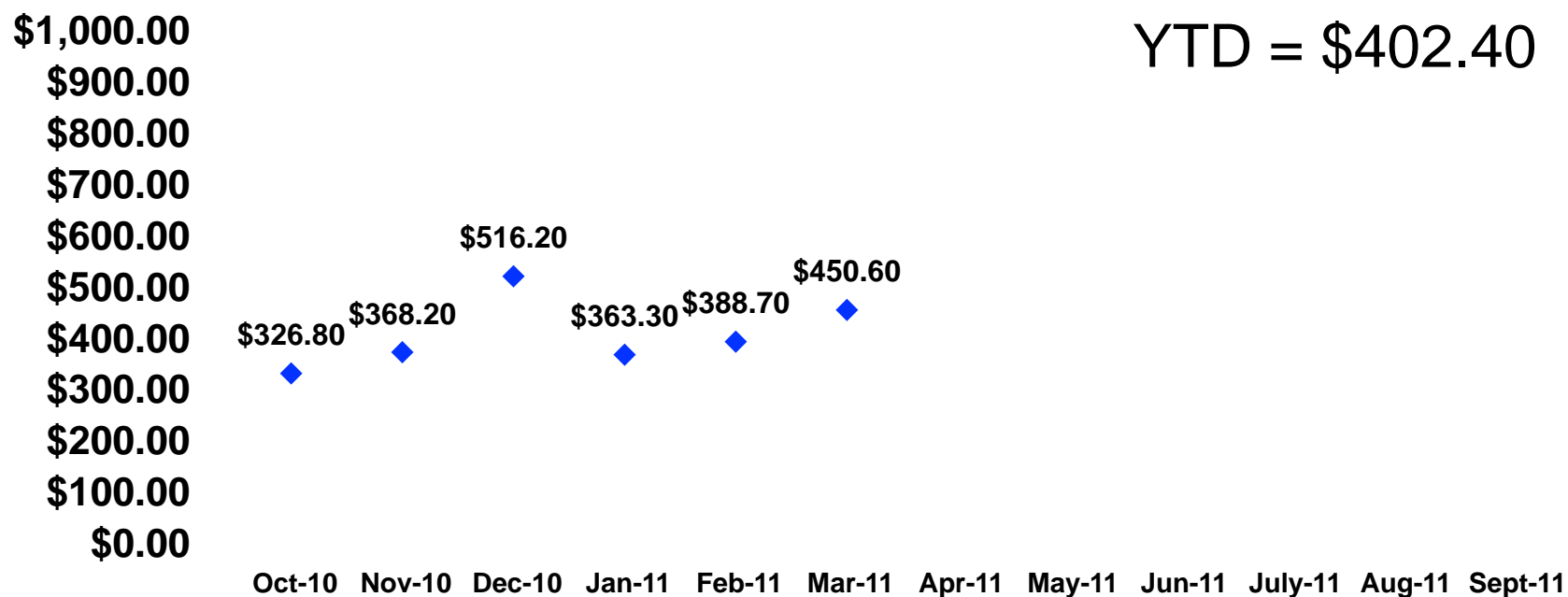
n=12



On-Island Expenditures

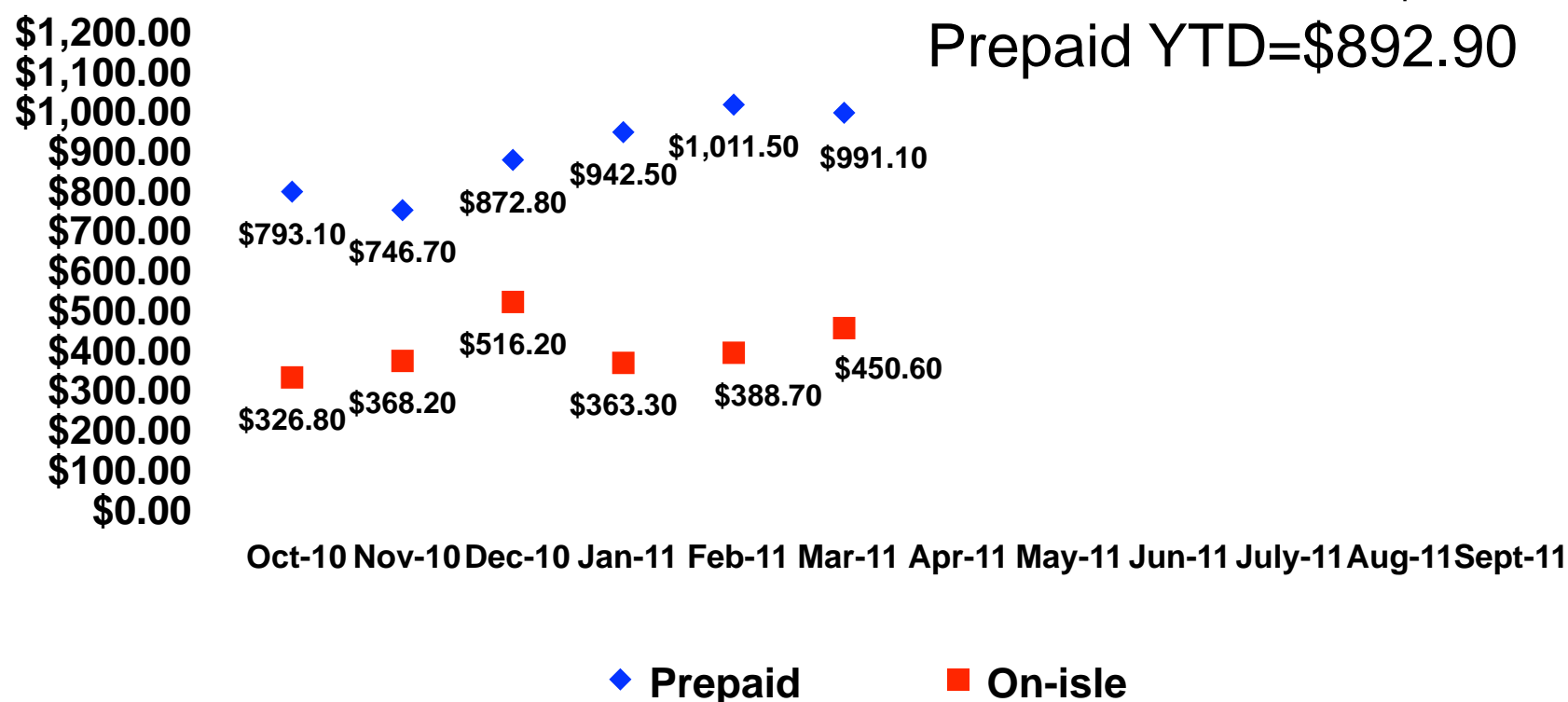
- \$927.10 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$8,000 = Maximum (highest amount recorded for the entire sample)
- \$450.60 = overall mean average per person on-island expenditure

On-Island Expenditures



Prepaid & On-island Expenditures

On-Island YTD = \$402.40
Prepaid YTD=\$892.90



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER									
					Male					Female				
					AGE					AGE				
					<20	20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$927.10	\$958.93	\$895.09	\$500.00	\$1,055.40	\$997.26	\$653.21	\$921.00	\$500.00	\$1,026.37	\$821.20	\$829.14	\$518.57
	Median	\$750	\$700	\$779	\$500	\$800	\$740	\$505	\$630	\$500	\$960	\$638	\$500	\$400

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$29.74	\$32.45	\$27.02	\$0.00	\$32.39	\$24.69	\$13.39	\$97.76
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$31.70	\$34.42	\$28.96	\$0.00	\$37.69	\$31.39	\$19.03	\$18.82
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$58.83	\$68.38	\$49.22	\$0.00	\$52.90	\$62.17	\$43.55	\$100.59
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$136.32	\$140.41	\$132.20	\$0.00	\$174.28	\$109.08	\$94.35	\$246.47
	Median	\$0	\$0	\$0	\$0	\$145	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$230.95	\$239.93	\$221.91	\$0.00	\$244.18	\$246.02	\$193.68	\$70.59
	Median	\$0	\$20	\$0	\$0	\$0	\$38	\$35	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$175.25	\$195.19	\$155.19	\$0.00	\$180.13	\$198.05	\$54.19	\$138.82
	Median	\$0	\$0	\$0	\$0	\$10	\$0	\$0	\$0
LOCAL TRANS	Mean	\$32.07	\$38.66	\$25.45	\$0.00	\$36.91	\$33.20	\$17.74	\$15.29
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$233.35	\$211.59	\$255.11	\$500.00	\$277.16	\$212.34	\$257.00	\$66.94
	Median	\$10	\$0	\$23	\$500	\$13	\$10	\$60	\$0
TOTAL ON ISLAND	Mean	\$927.10	\$958.93	\$895.09	\$500.00	\$1,037.56	\$913.61	\$692.94	\$755.29
	Median	\$750	\$700	\$779	\$500	\$925	\$700	\$500	\$600

On-Island Expenditures

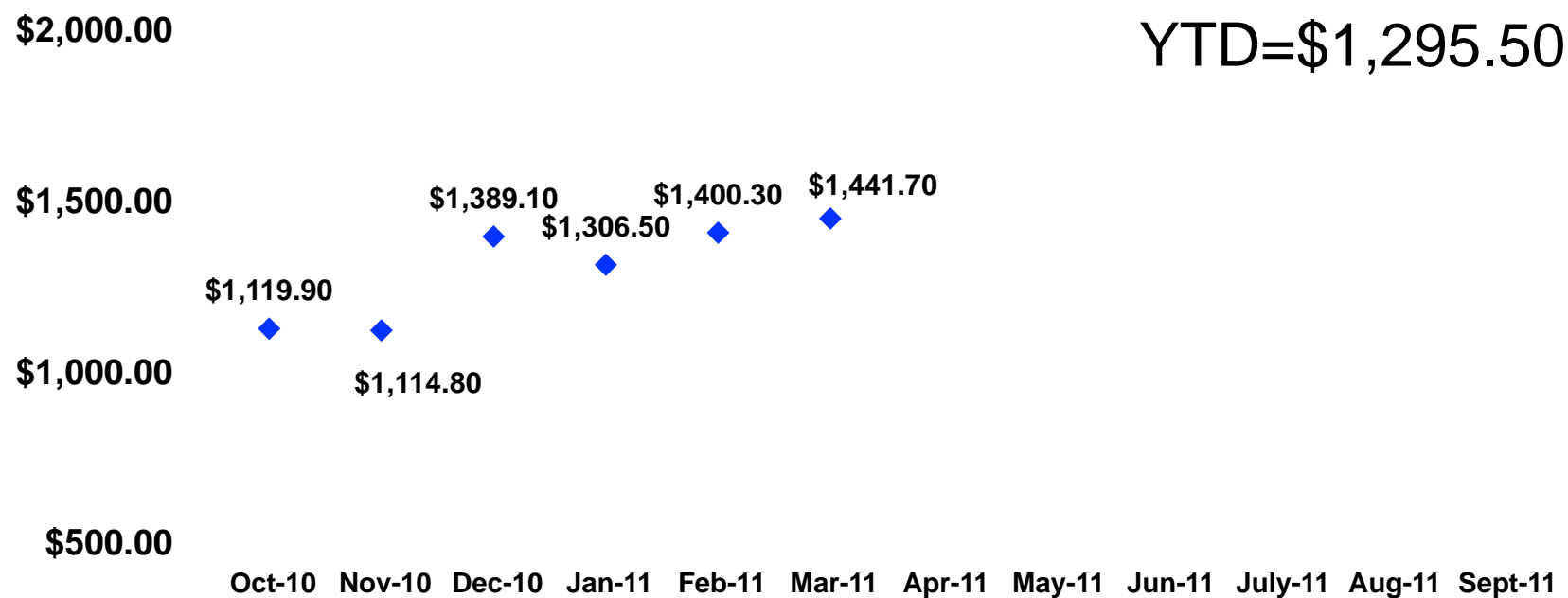
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$27.85	\$39.36
	Median	\$0	\$0
F&B-FF	Mean	\$32.53	\$27.47
	Median	\$0	\$0
REST/CONV	Mean	\$51.24	\$97.41
	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$145.71	\$88.57
	Median	\$0	\$0
HOTEL/ REST	Mean	\$232.80	\$221.52
	Median	\$0	\$85
OPTIONAL	Mean	\$183.13	\$135.17
	Median	\$0	\$0
TOUR	Mean	\$30.14	\$41.90
	Median	\$0	\$0
GIFT/	Mean	\$228.81	\$256.86
	Median	\$10	\$40
SOUV-SELF	Mean	\$931.67	\$903.83
	Median	\$767	\$685
GIFT/ SOUV-	Mean		
	Median		
F&F AT HOME	Mean		
	Median		
LOCAL TRANS	Mean		
	Median		
OTHER EXP	Mean		
	Median		
TOTAL ON ISLAND	Mean		
	Median		

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,441.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,742 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

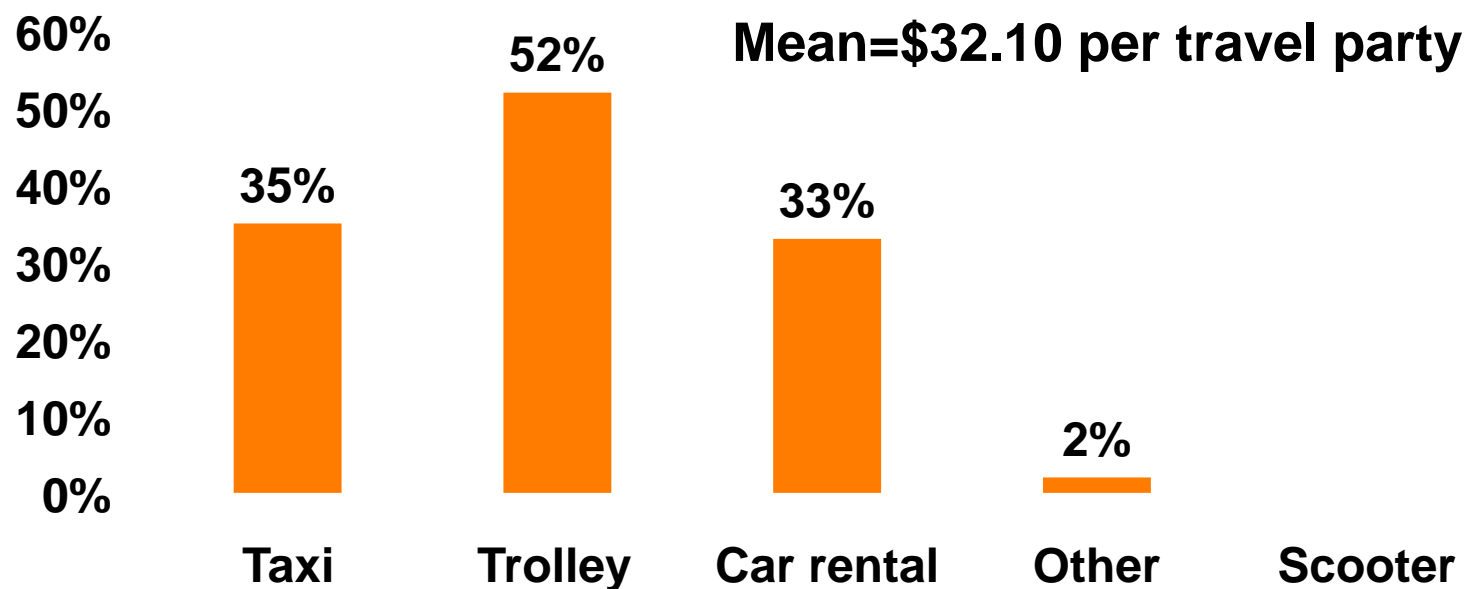


Breakdown of On-Island Expenditures

∴	MEAN \$
Food & beverage in a hotel	\$29.70
Food & beverage in fast food restaurant/ convenience store	\$31.70
Food & beverage at restaurants or drinking establishments outside a hotel	\$58.80
Optional tours and activities	\$136.30
Gifts/ souvenirs for yourself/companions	\$230.90
Gifts/ souvenirs for friends/family at home	\$175.20
Local transportation	\$32.10
Other expenses not covered	\$233.30
Average Total	\$927.10

Local Transportation

n=120



Guam Airport Expenditures

- \$71.70 = 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

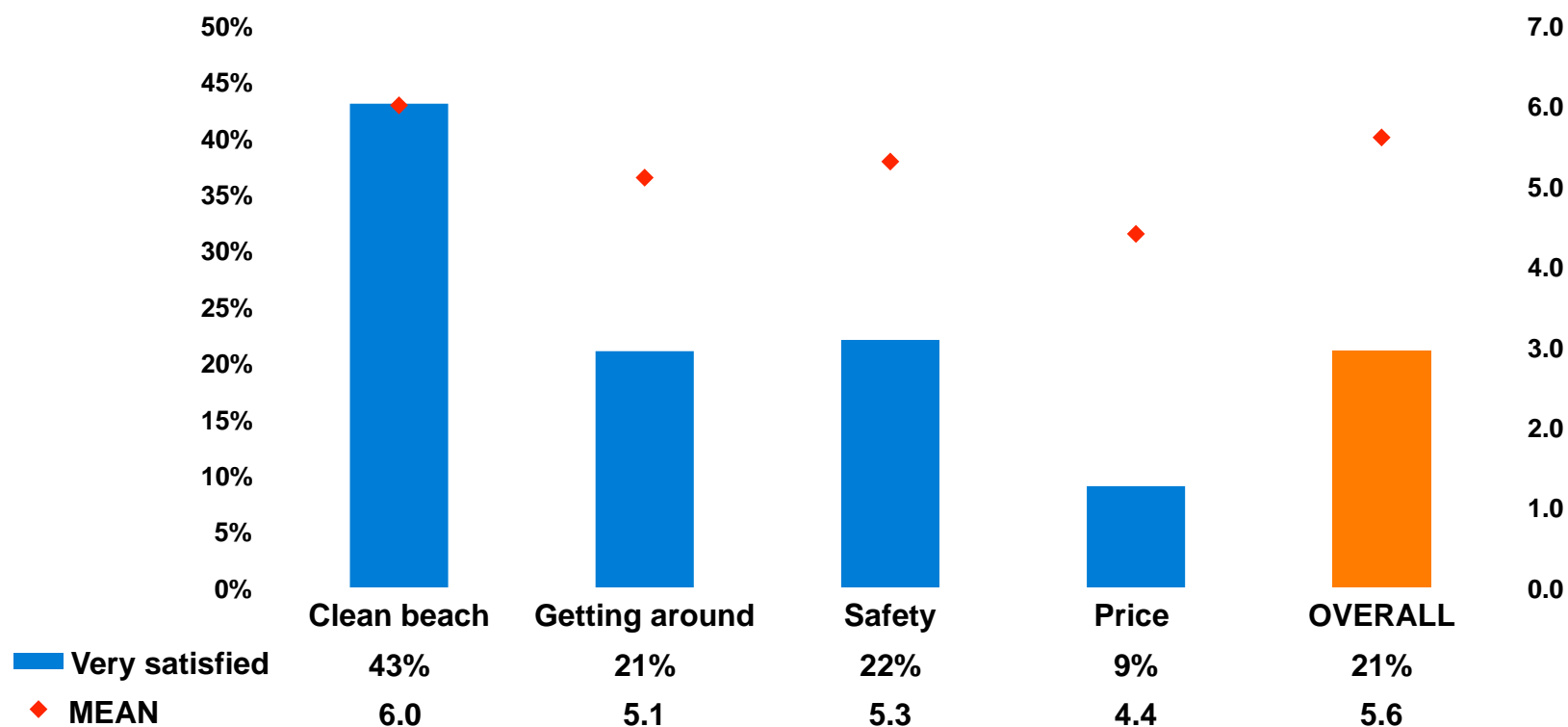
::	MEAN \$
Food & Beverages	\$4.60
Gifts/Souvenirs Self	\$41.20
Gifts/Souvenirs Others	\$25.90
Total	\$71.70

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

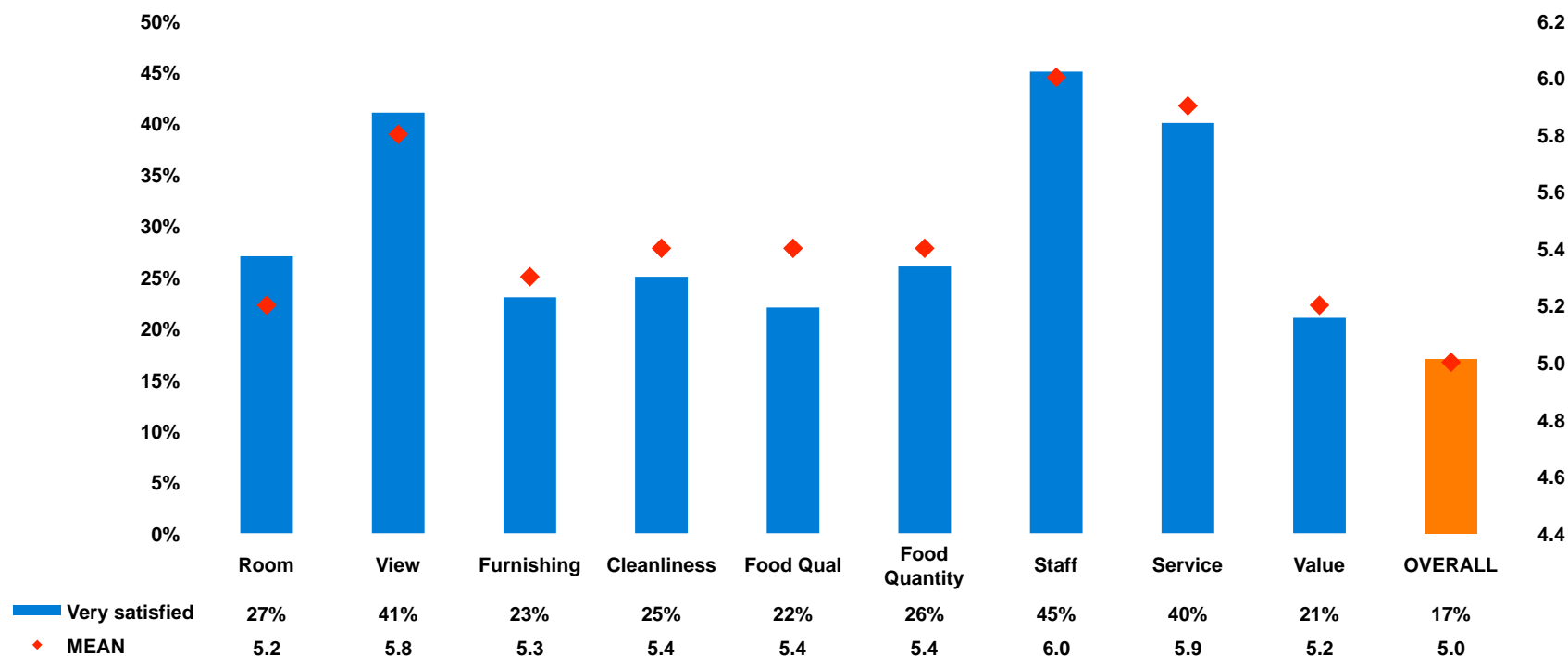
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

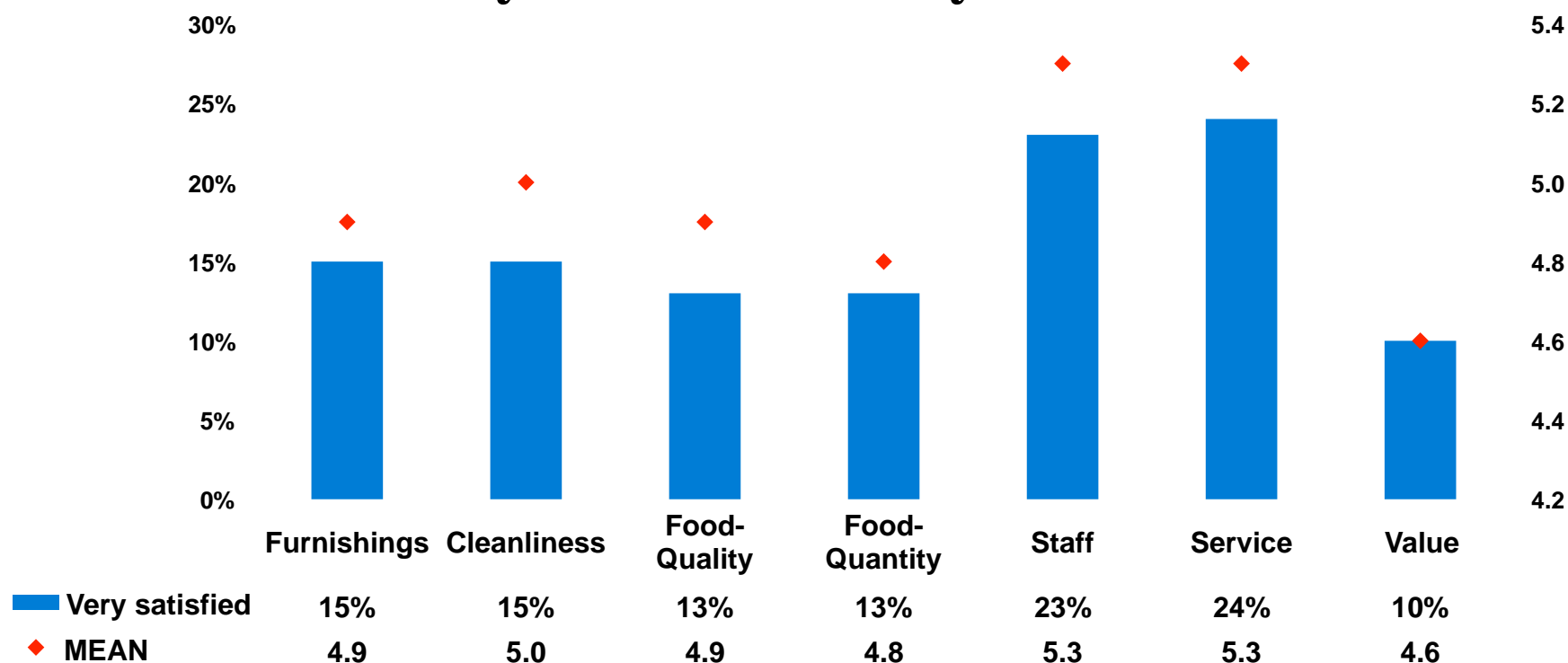
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

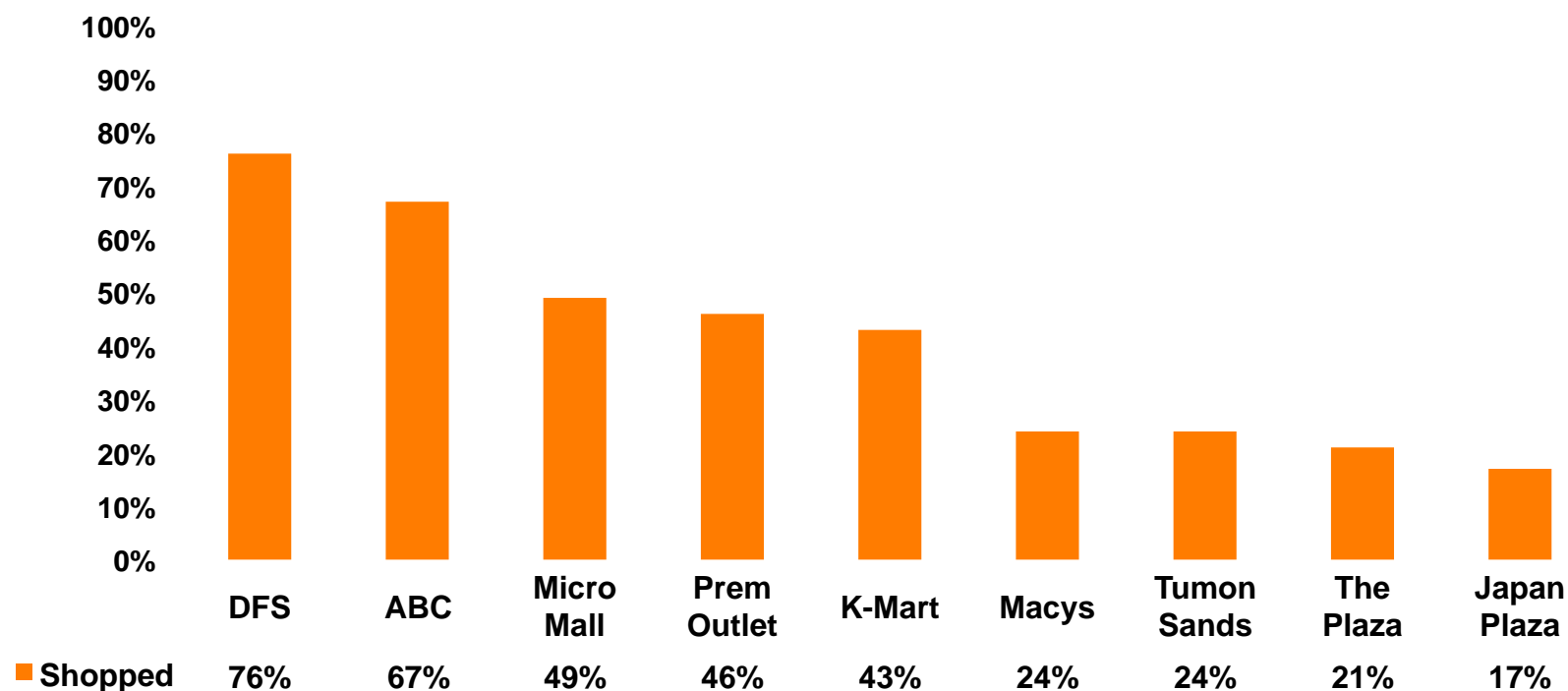
7pt Rating Scale

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

Score of 6 to 7 = **49%**

Score of 4 to 5 = **43%**

Score 1 to 3 = **8%**

MEAN = 5.2

Variety of Shopping

Score of 6 to 7 = **44%**

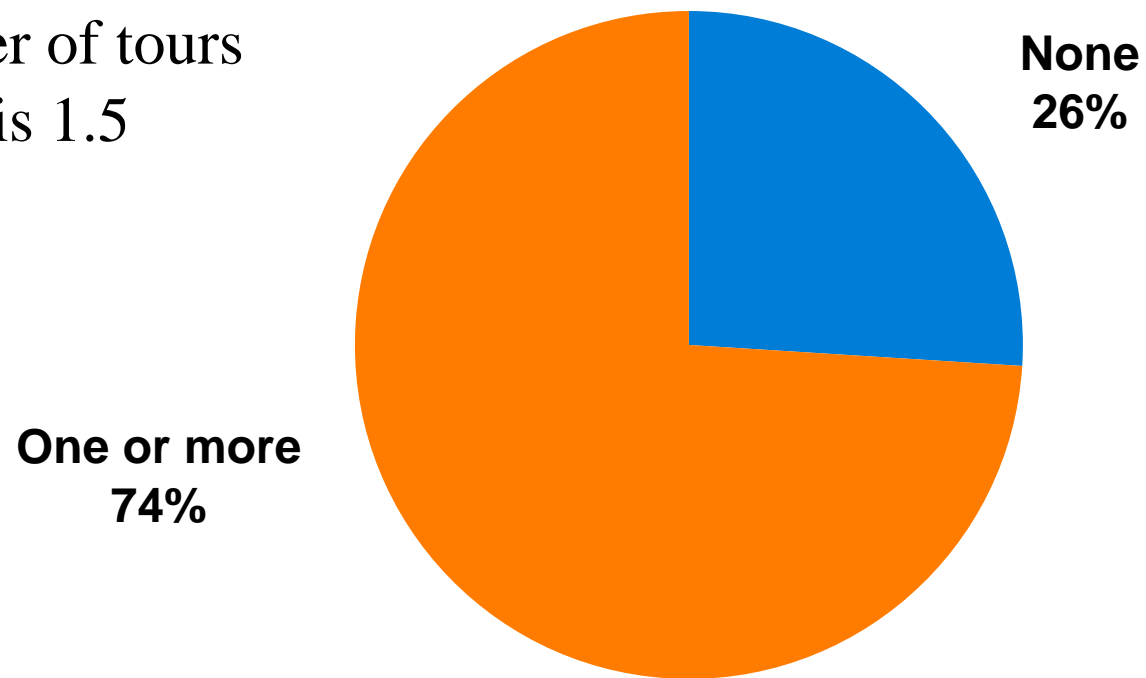
Score of 4 to 5 = **41%**

Score 1 to 3 = **15%**

MEAN = 5.0

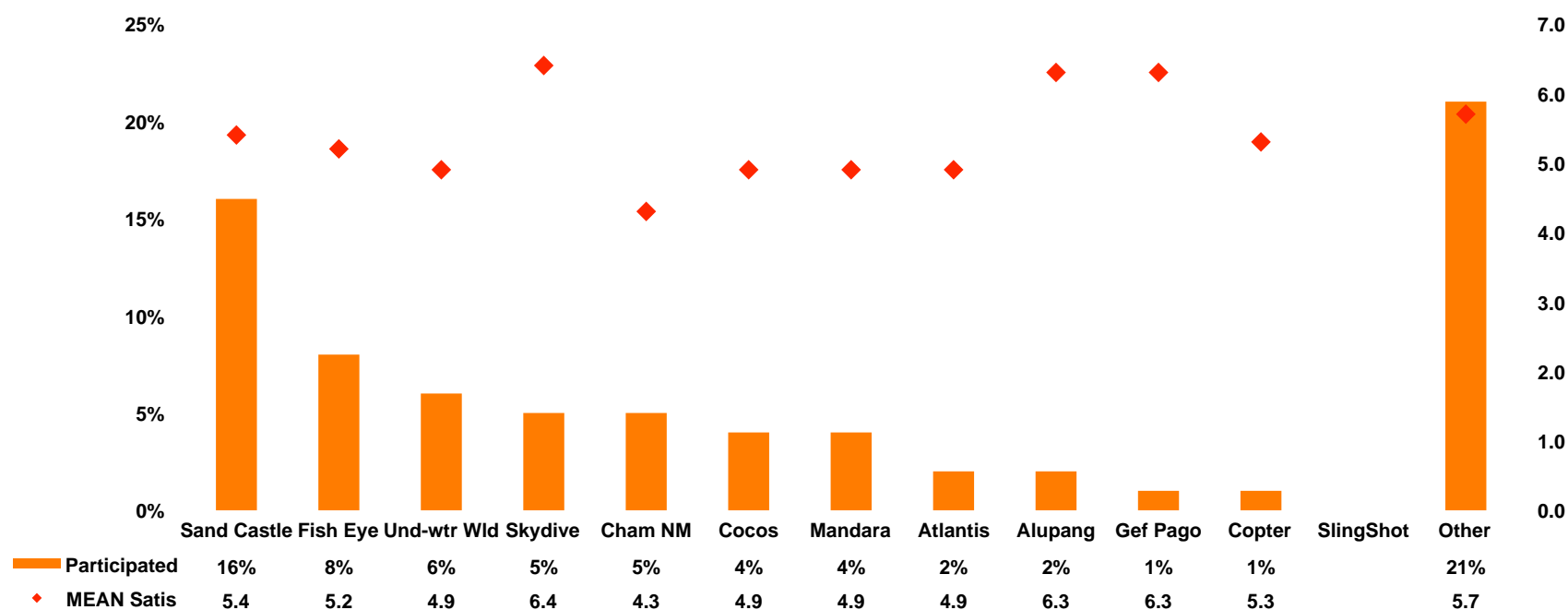
Optional Tour Participation

- Average number of tours participated in is 1.5



Optional Tours

Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

∴

Quality of Day Tour

Score of 6 to 7 = **44%**

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

Score 1 to 3 = **8%**

MEAN = 5.1

Variety of Day Tour

Score of 6 to 7 = **36%**

Score of 4 to 5 = **52%**

Score 1 to 3 = **12%**

MEAN = 4.8

Night Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

∴

Quality of Night Tour

Score of 6 to 7 = **25%**

Score of 4 to 5 = **59%**

Score 1 to 3 = **17%**

MEAN = 4.5

Variety of Night Tour

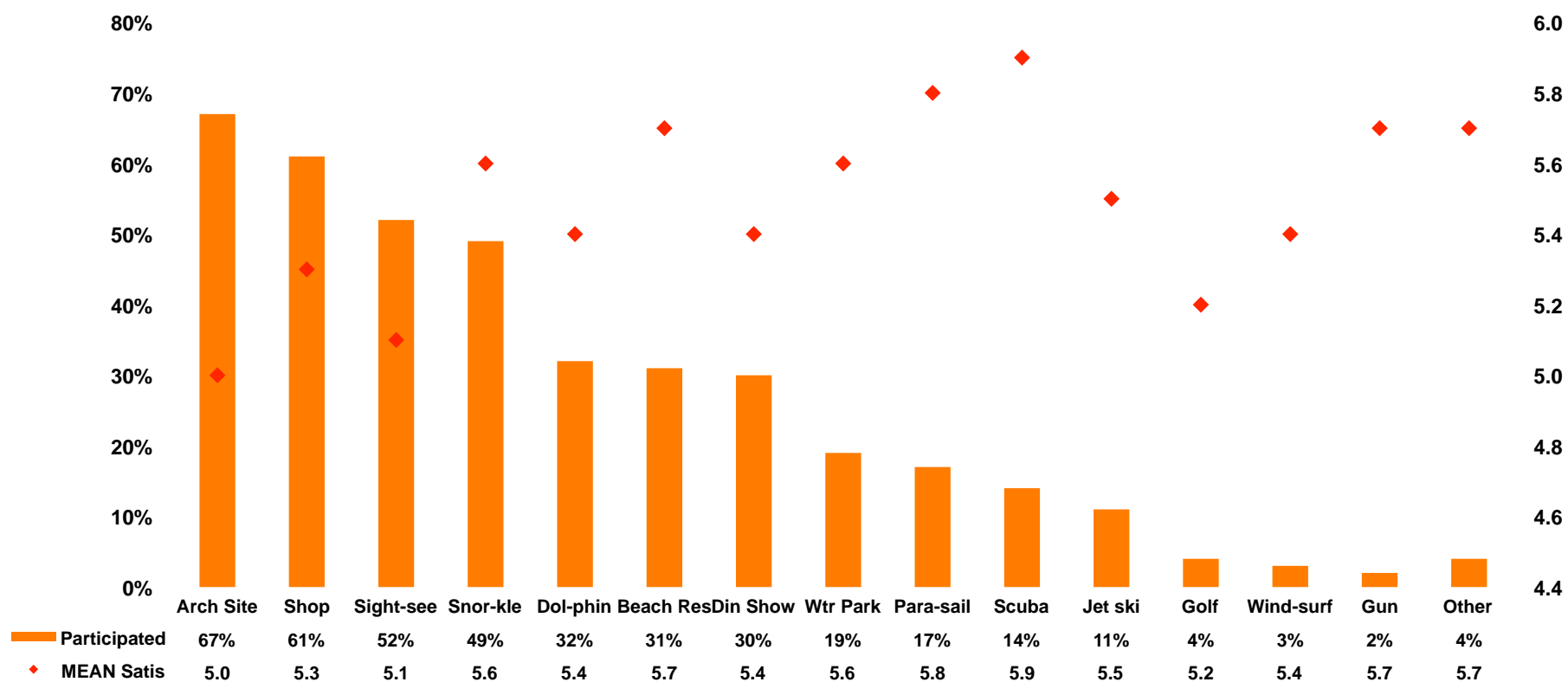
Score of 6 to 7 = **24%**

Score of 4 to 5 = **54%**

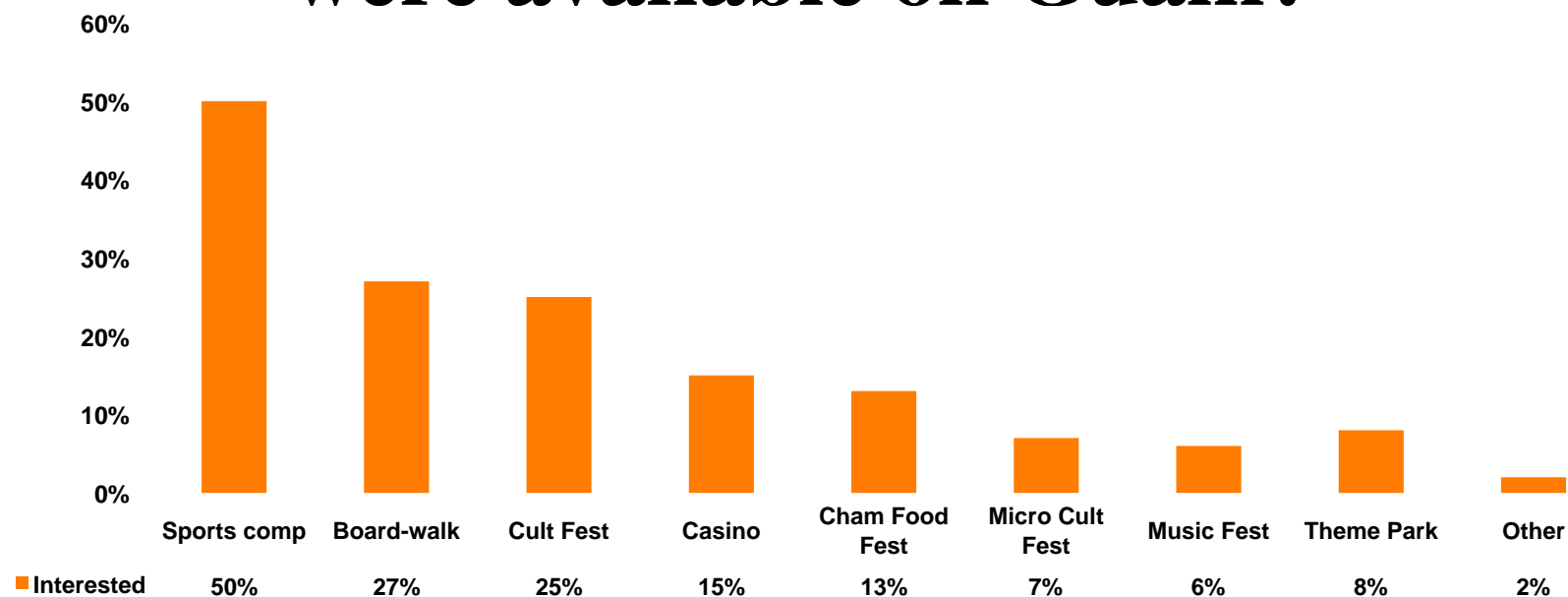
Score 1 to 3 = **22%**

MEAN = 4.3

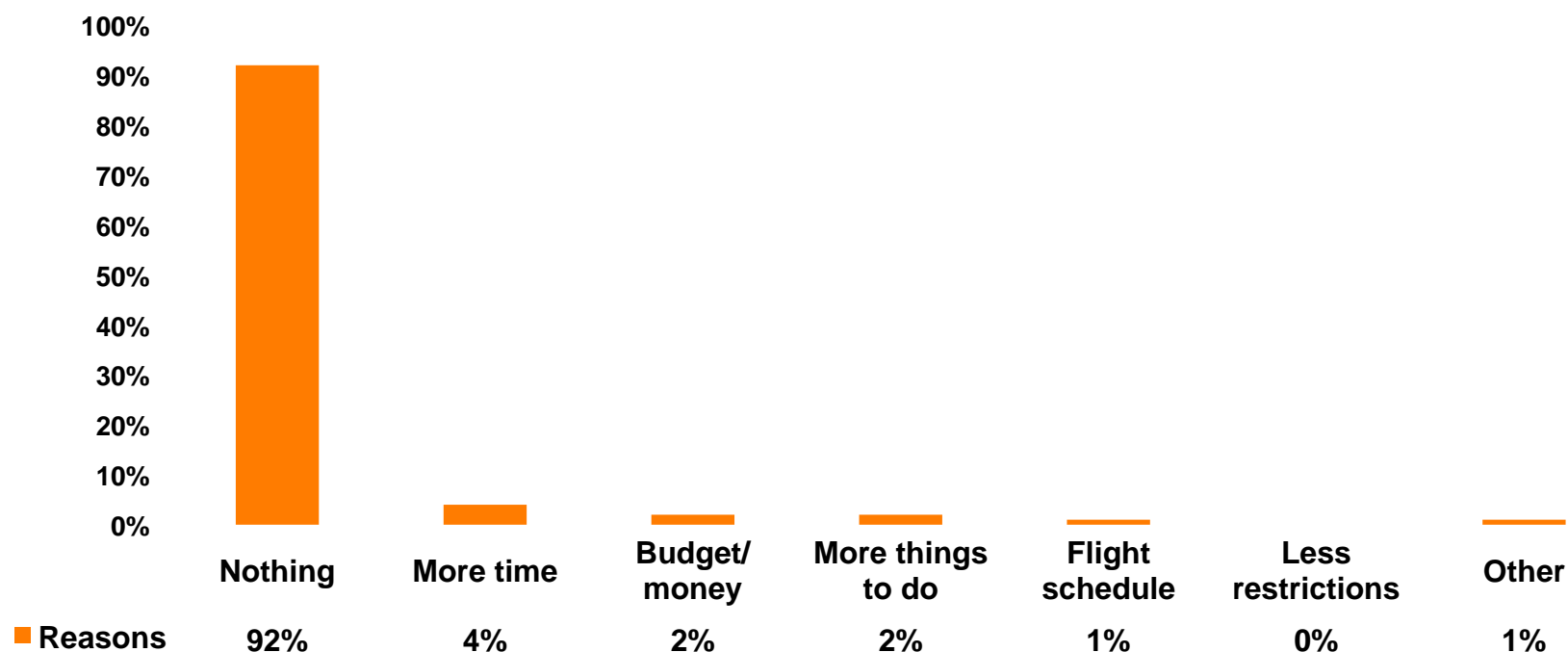
Satisfaction with Other Activities



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



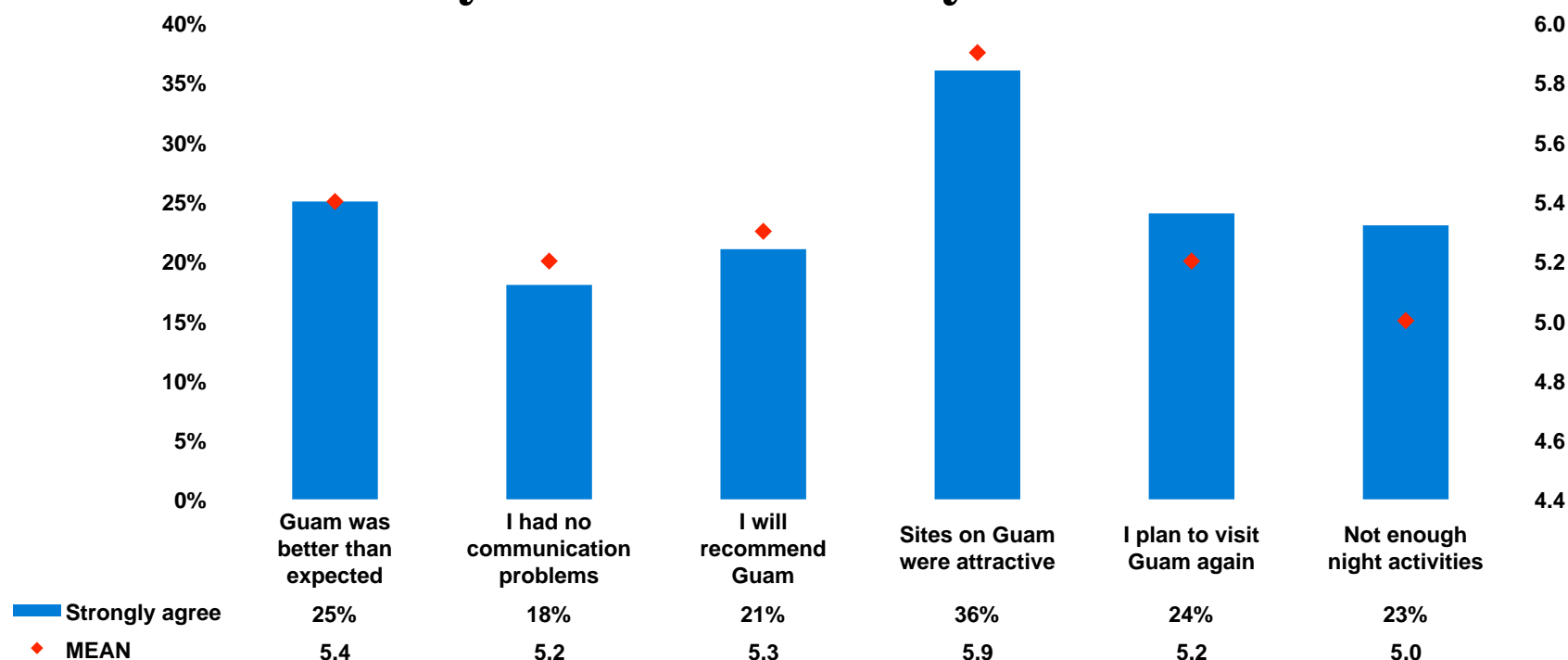
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

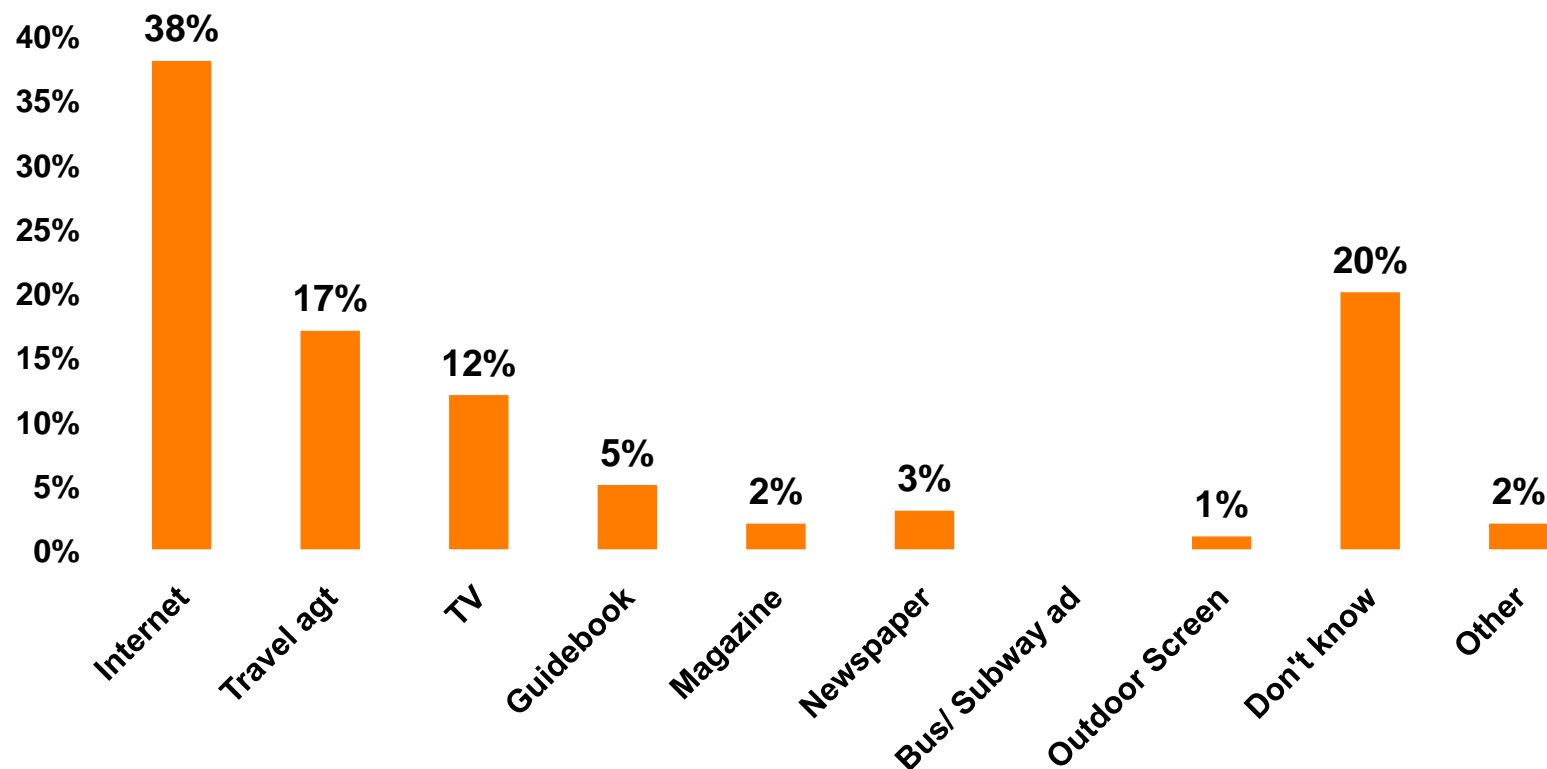
7=Very Satisfied/ 1=Very Dissatisfied



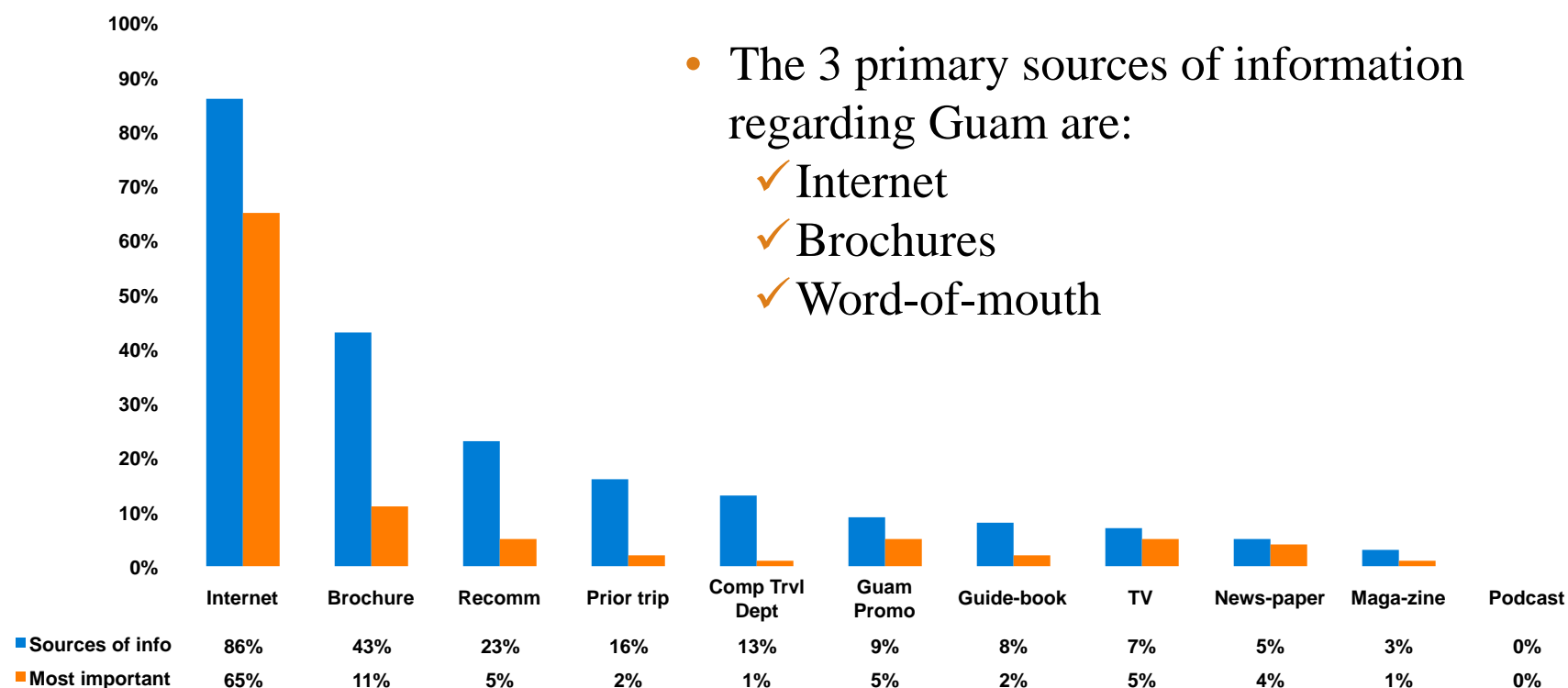
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

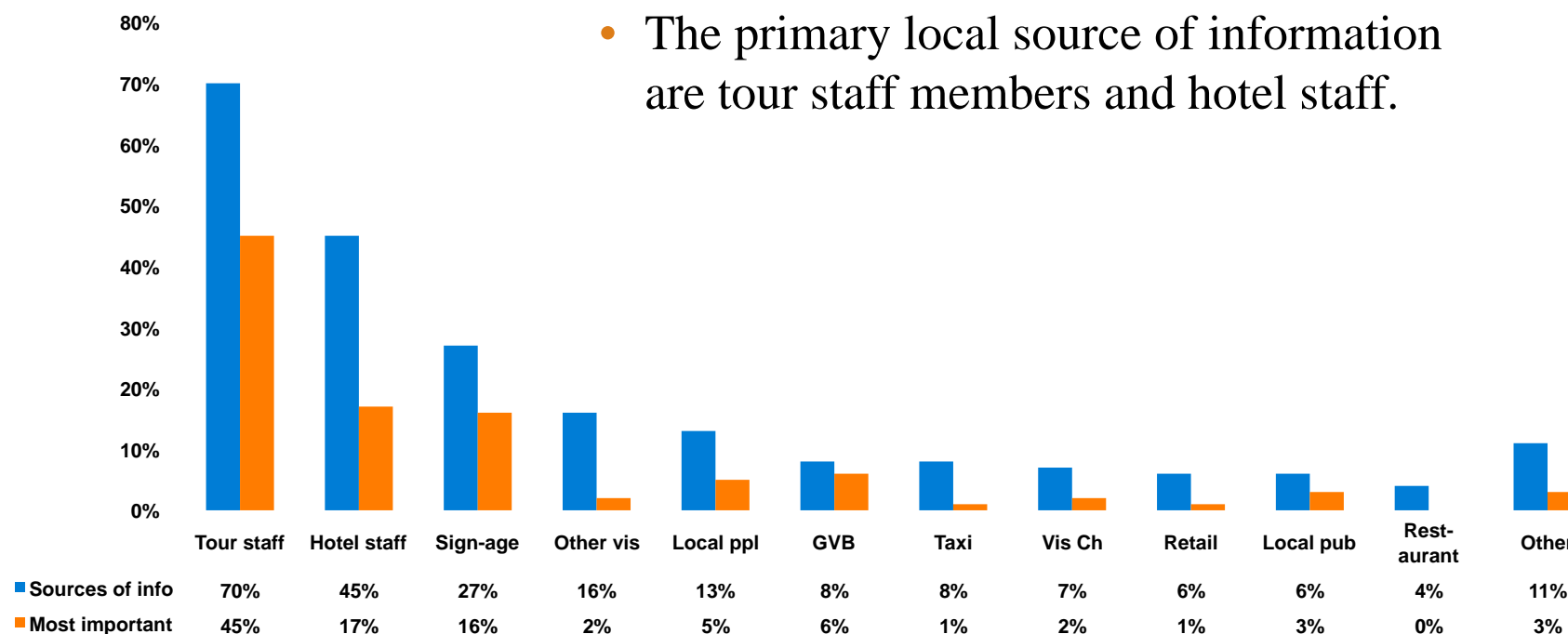
Past 90 days



Sources of Information Pre-arrival

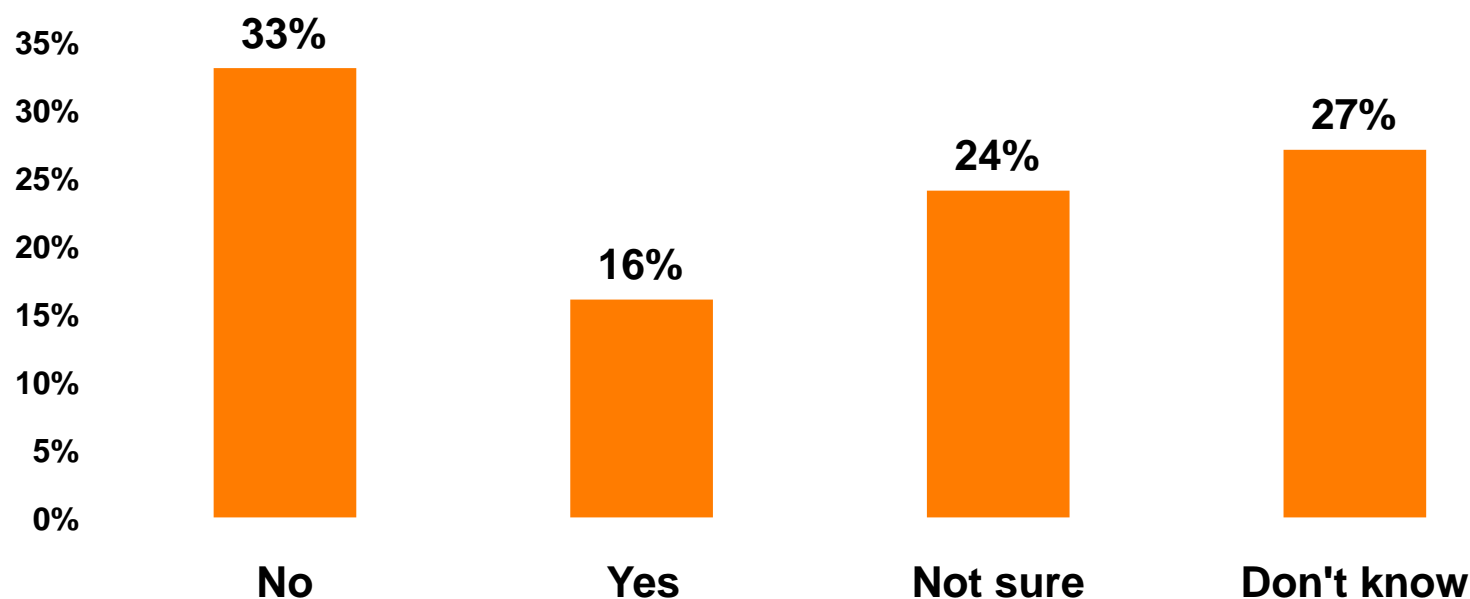


Sources of Information Post-arrival



SECTION 6 **OTHER ISSUES**

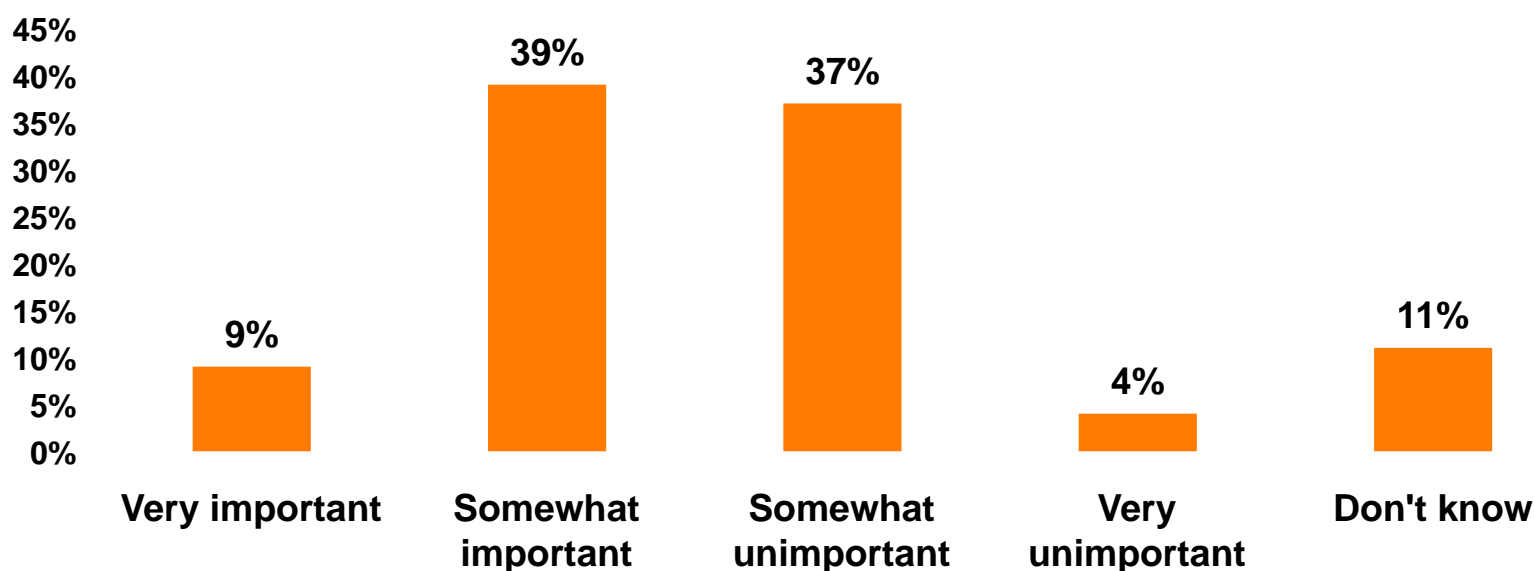
Good time to spend money on travel outside of Korea - Overall



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	100%	27%	36%	26%	47%	44%	30%	37%	30%	30%
	Yes		15%	17%	10%	24%	3%	17%	12%	27%	
	Not sure		25%	22%	29%	24%	28%	25%	24%	21%	20%
	Do not know		34%	24%	35%	6%	25%	28%	27%	23%	50%
Total	Count	2	122	181	31	17	36	138	89	71	10

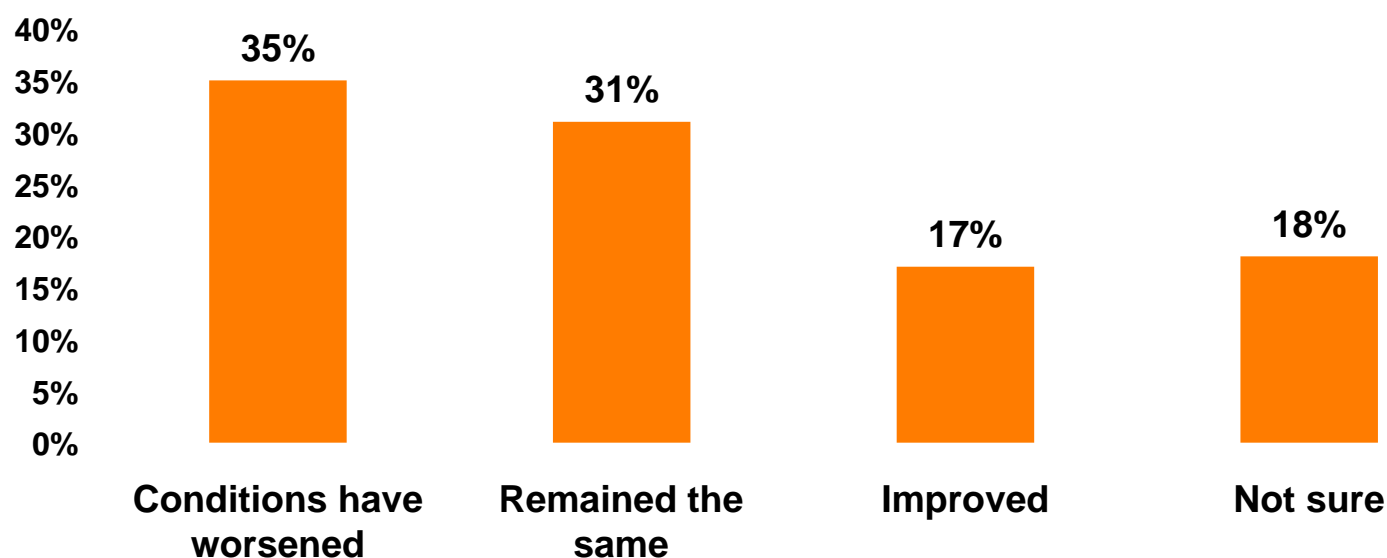
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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%	5%			11%	3%	3%	6%	
	Somewhat unimportant	50%	34%	38%	45%	35%	44%	31%	35%	52%	20%
	Somewhat important		37%	40%	42%	41%	22%	43%	43%	32%	50%
	Very important	50%	10%	9%		12%	11%	11%	7%	6%	20%
	Don't know		14%	8%	13%	12%	11%	12%	12%	4%	10%
Total	Count	2	121	181	31	17	36	137	89	71	10

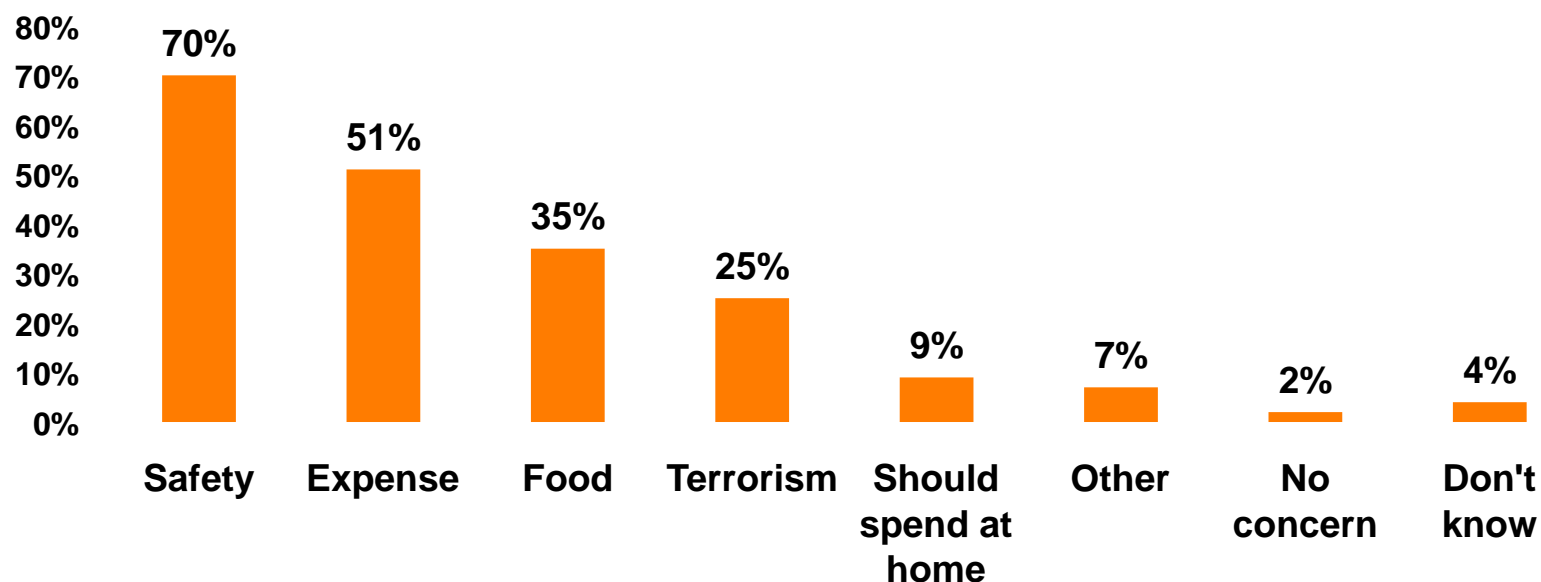
Rating Korean Economy Compared to 12 months ago



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		38%	38%	13%	24%	39%	40%	35%	27%	20%
	Conditions have remained the same		24%	33%	58%	18%	39%	28%	31%	34%	10%
	Conditions have improved	50%	15%	15%	23%	41%	3%	17%	16%	23%	20%
	Do not know	50%	24%	15%	6%	18%	19%	14%	18%	17%	50%
Total	Count	2	122	181	31	17	36	138	89	71	10

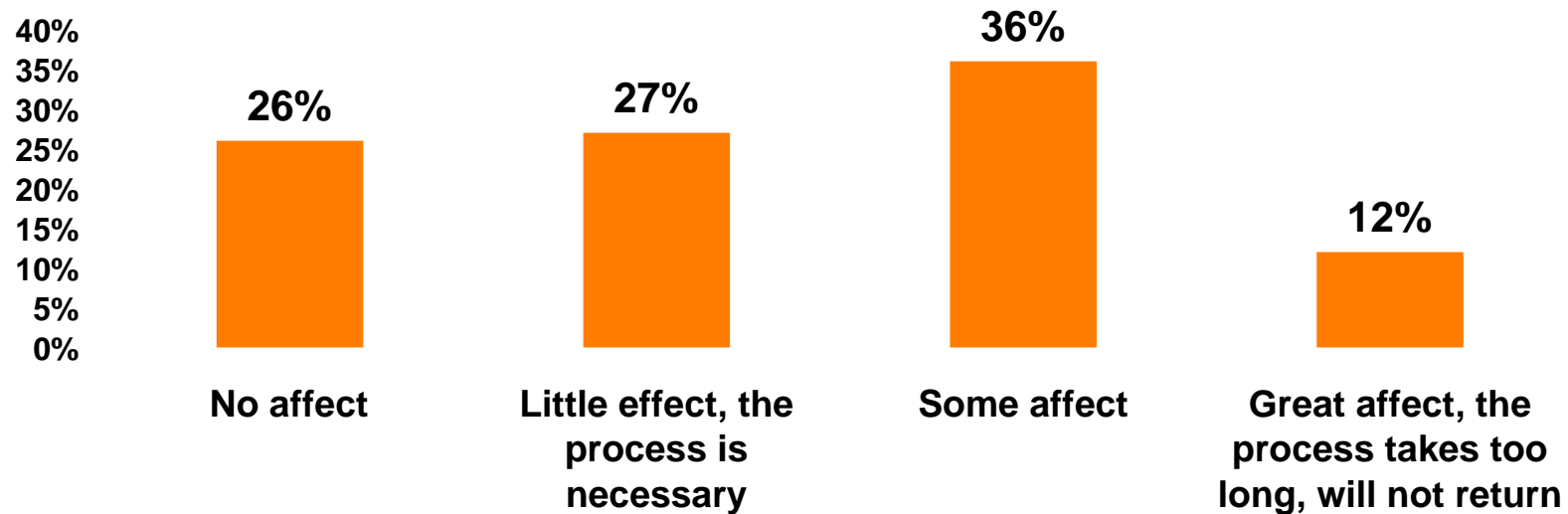
Concerns about travel outside of Korea - Overall



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	100%	66%	72%	81%	47%	75%	65%	73%	70%	80%
	Expense	50%	58%	51%	35%	24%	58%	54%	48%	41%	60%
	Food	50%	43%	29%	39%	47%	44%	28%	40%	41%	40%
	Terrorism	100%	30%	25%	10%	18%	28%	26%	20%	31%	30%
	Spending money abroad when it should be spent at home	50%	11%	8%	3%	12%	8%	13%	7%		20%
	Other		5%	7%	10%	6%	8%	6%	9%	6%	
	Do not know		5%	2%	6%	12%	6%	3%	6%	3%	
	No concerns		2%	3%			6%	1%	2%	3%	
Total	Cases	2	122	181	31	17	36	138	89	71	10

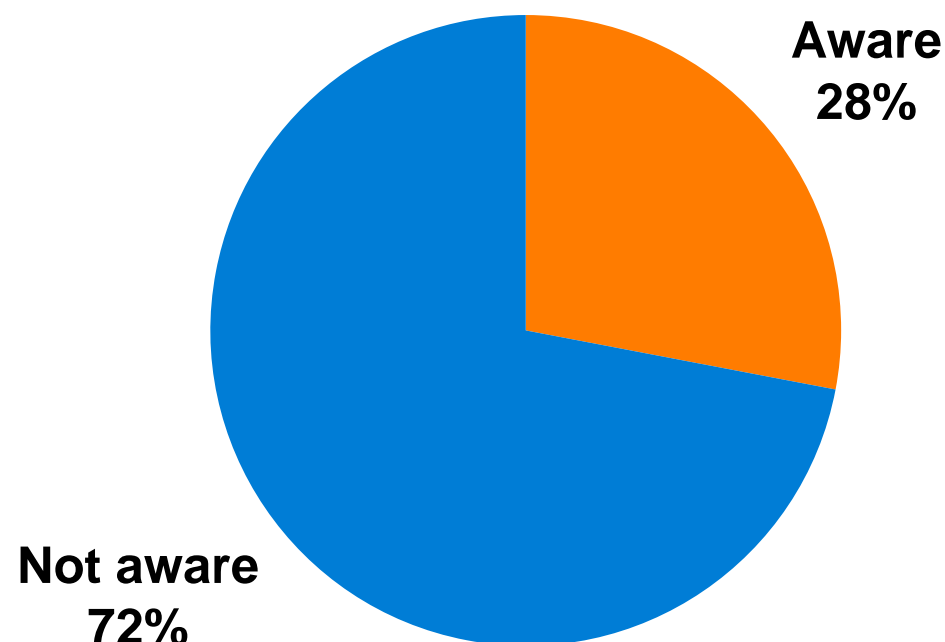
Security Screening/ Immigration Process at Guam International Airport



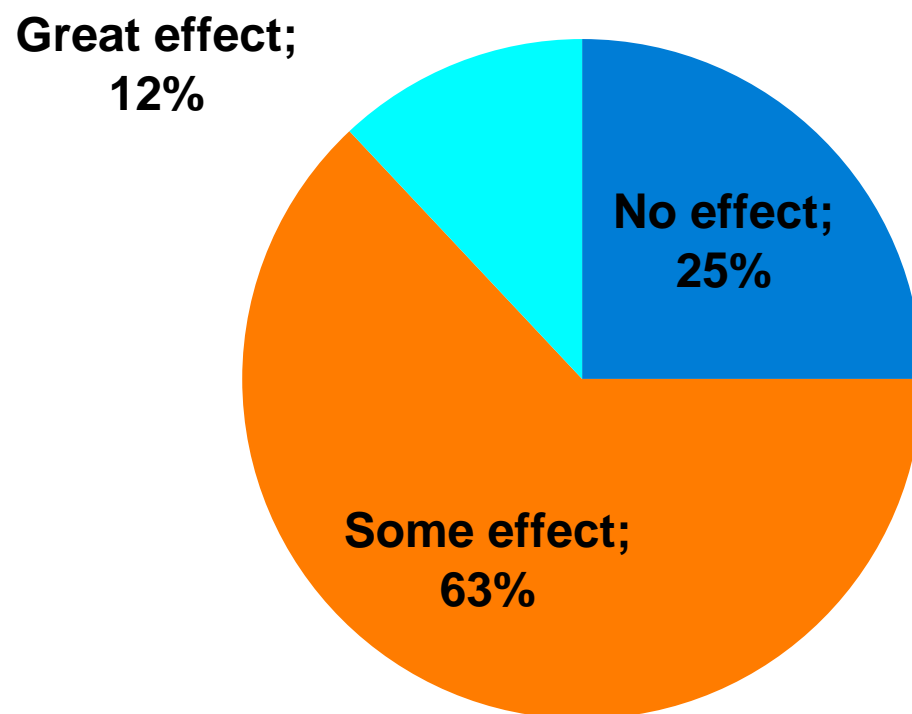
Hotel Room Surcharge by \$3.00 Per day/ Per room to help build the Guam Museum

- Mean Rating – **2.9** out of possible 7.0
- Agree (Score 6-7) – **6%**
- Neutral (Score 4-5) – **39%**
- Disagree (Score 1-3) – **55%**

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

