



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

MAY 2011



Prepared by: QMark Research

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Background & Methodology

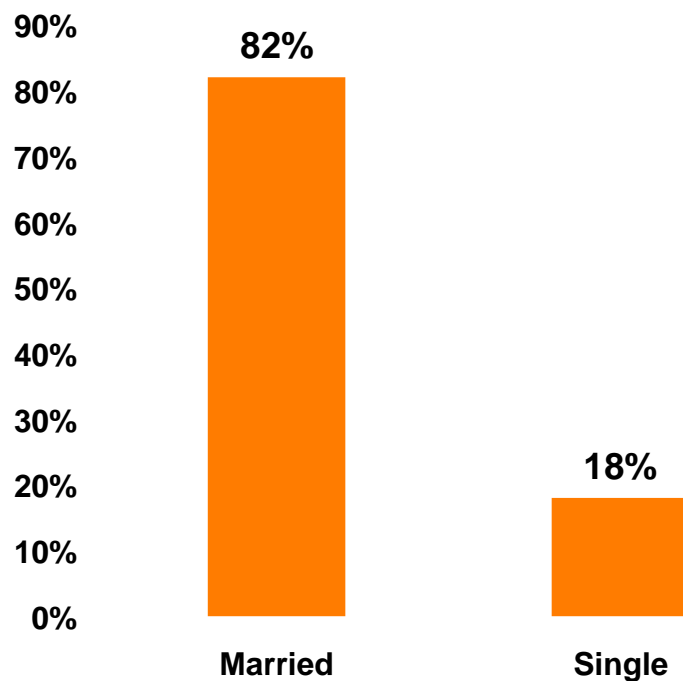
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

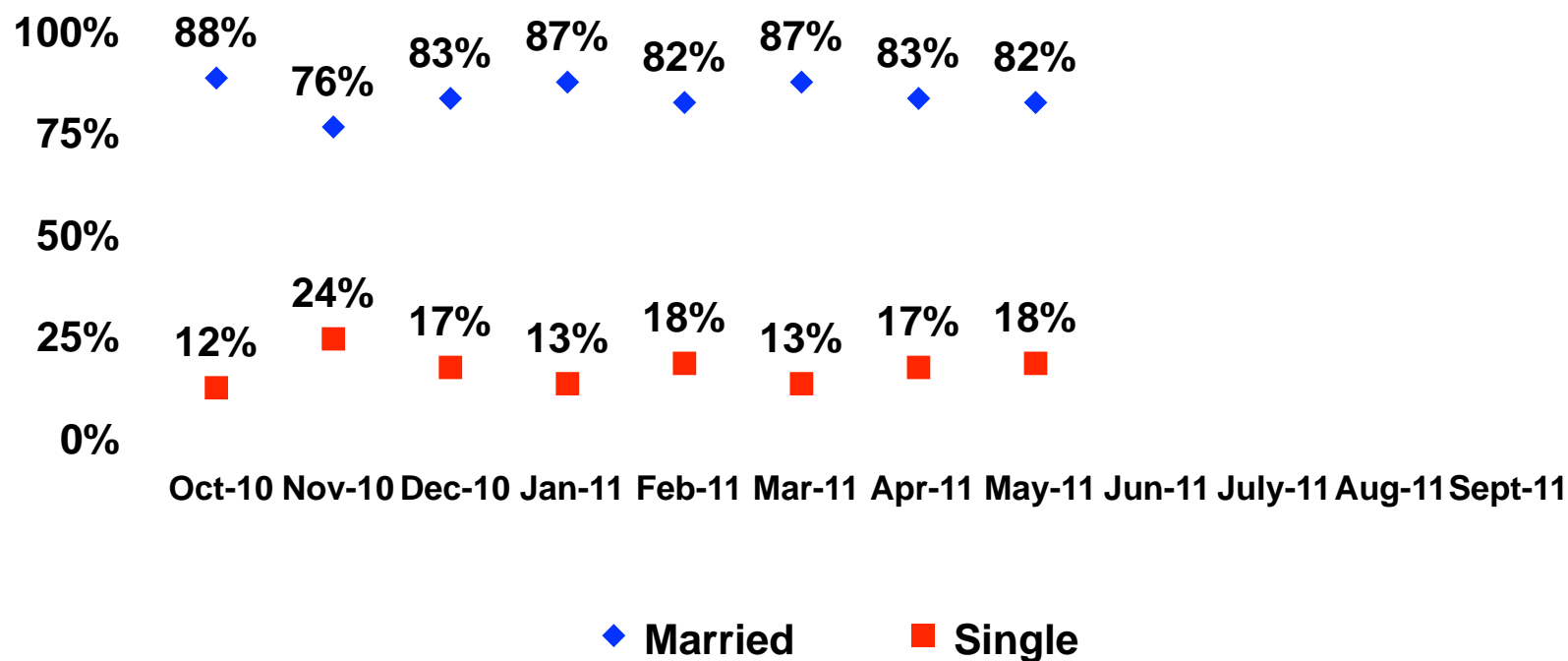
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

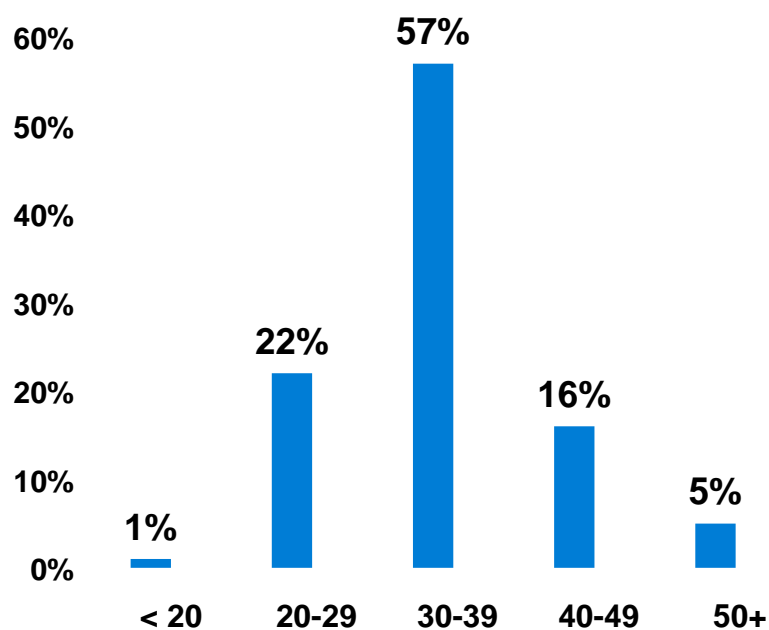


- A majority of visitors are married.

Marital Status

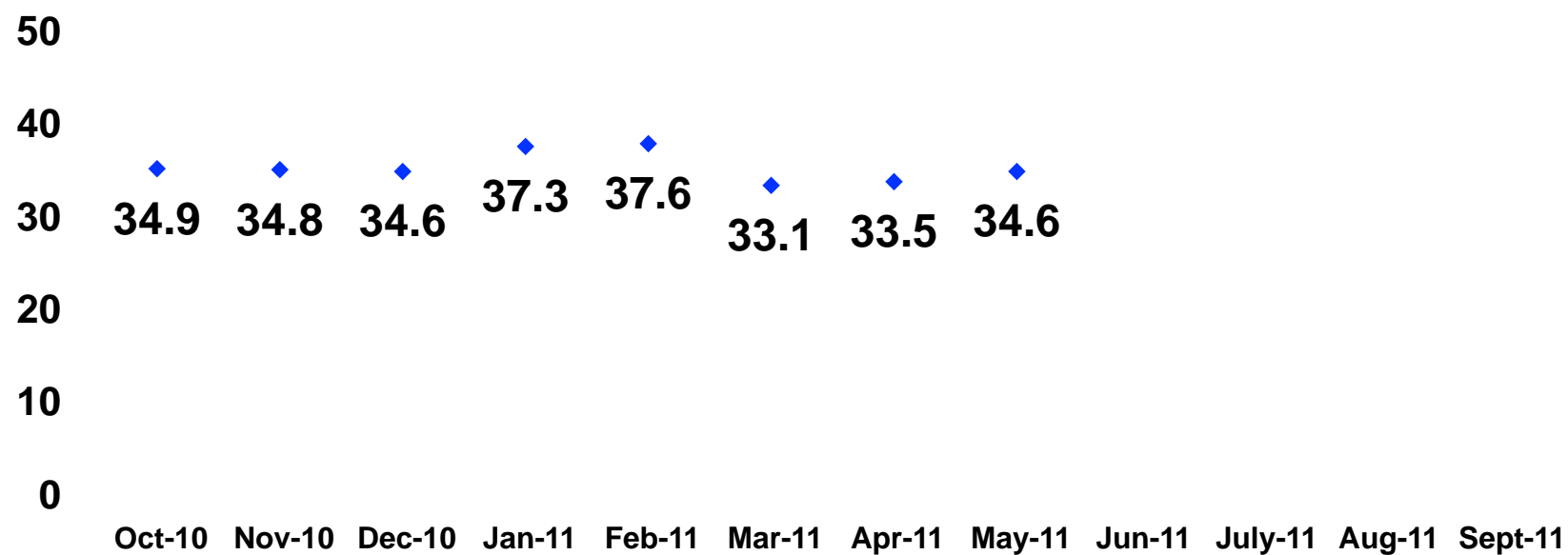


Age - Overall

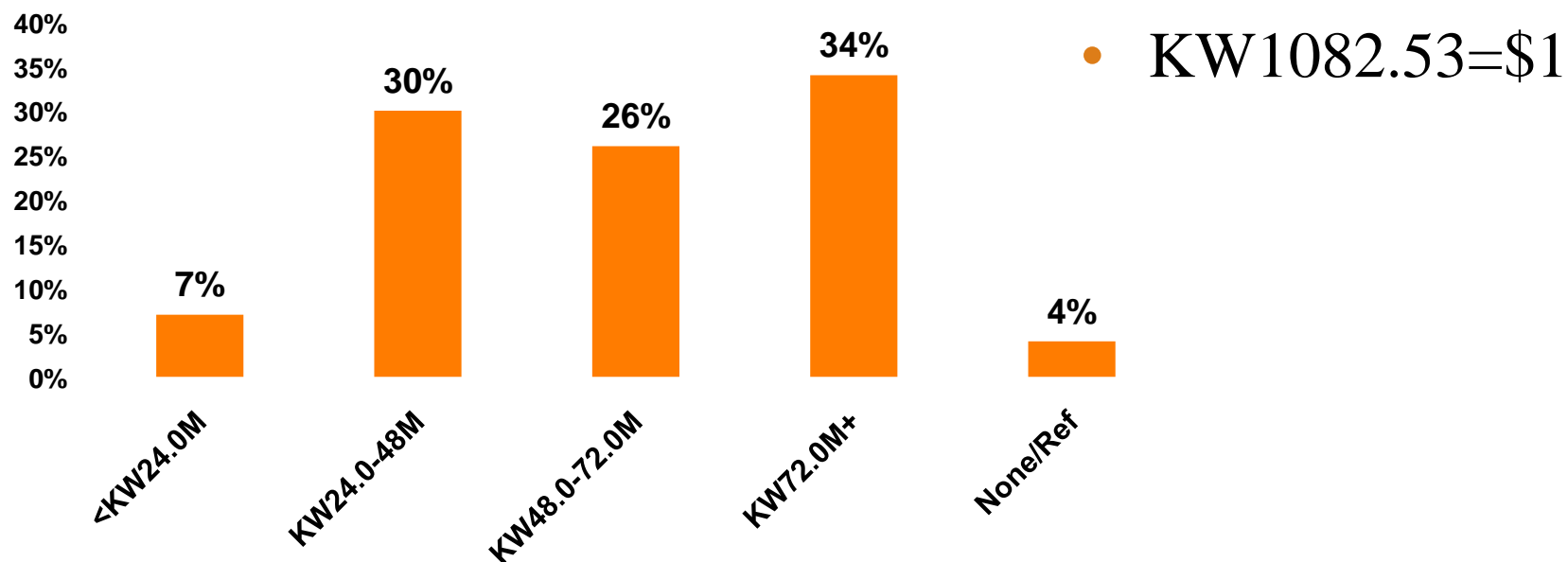


- The average age of the respondents is 34.6 years of age.

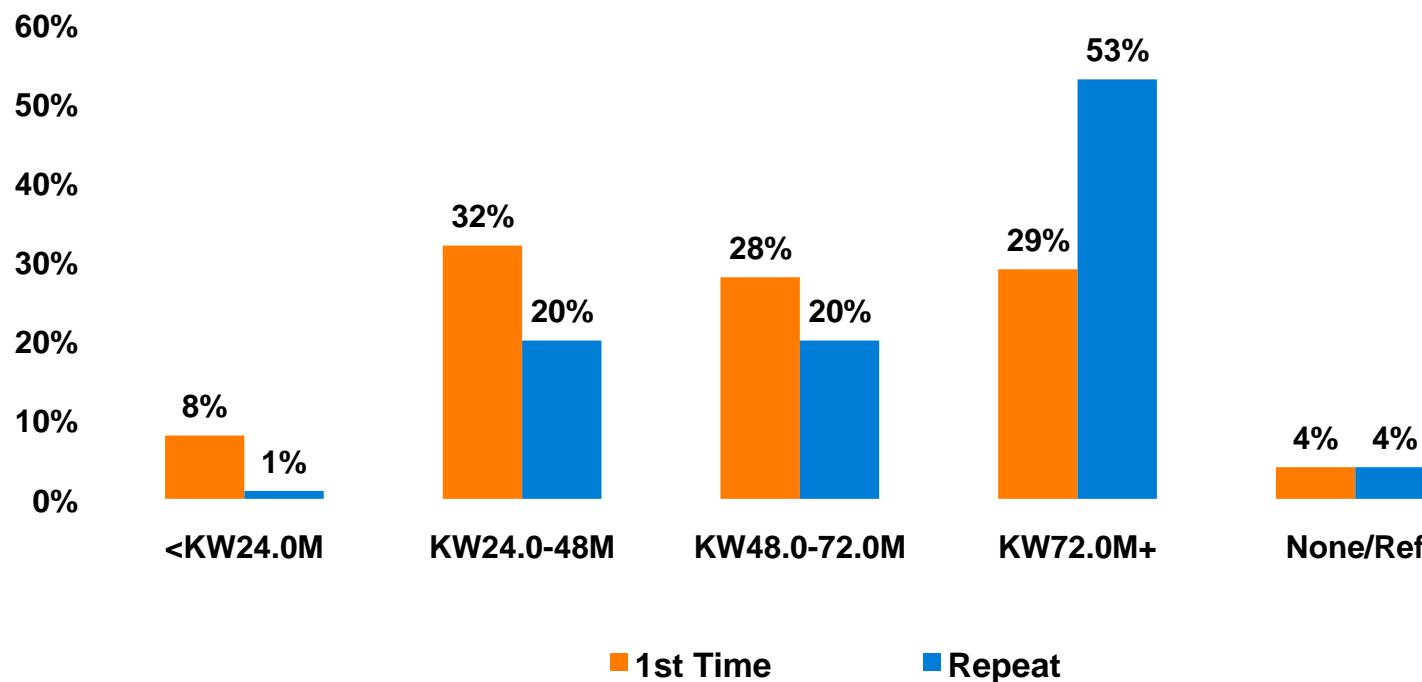
Average Age



Personal Income



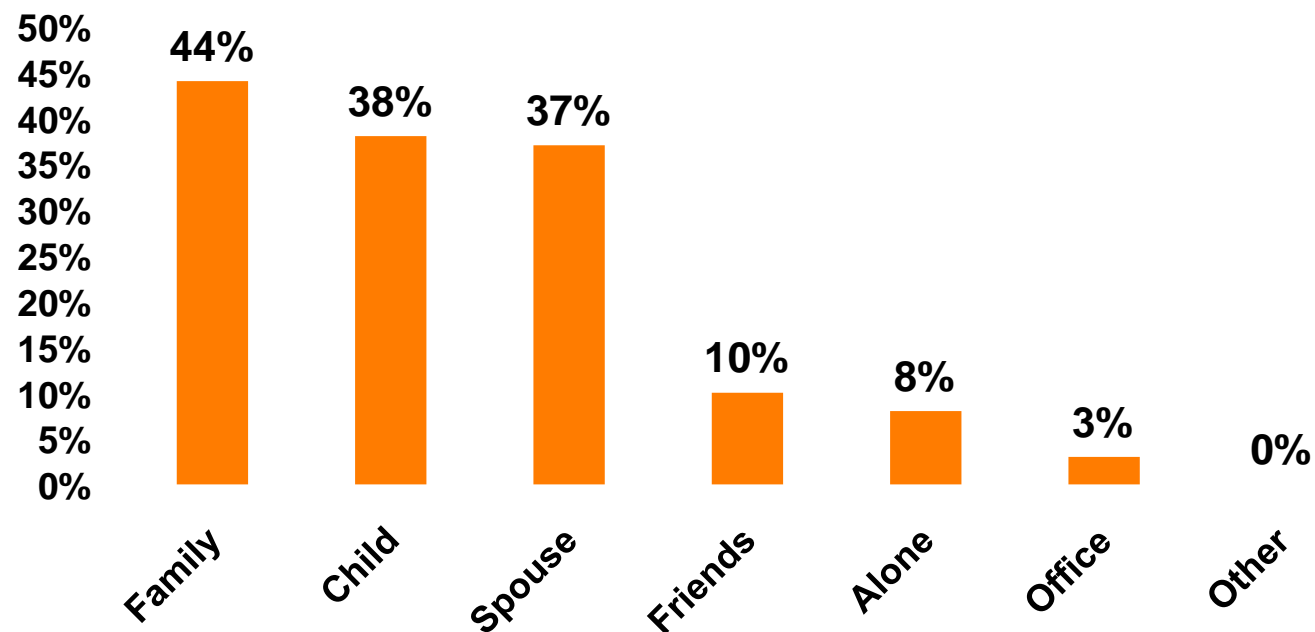
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	25	10	15		14	8	3	
			7%	6%	9%		18%	4%	5%	
	KW24.0M-KW48.0M	Count	102	46	56		33	53	10	6
			29%	26%	33%		43%	27%	18%	38%
	KW48.0M-KW72.0M	Count	90	49	41	1	14	59	13	3
			26%	28%	24%	50%	18%	30%	23%	19%
	KW72.0M+	Count	116	65	51		10	69	30	7
			34%	37%	30%		13%	35%	54%	44%
	Refused	Count	13	4	9	1	5	7		
			4%	2%	5%	50%	7%	4%		
Total	Count	346	174	172	2	76	196	56	16	

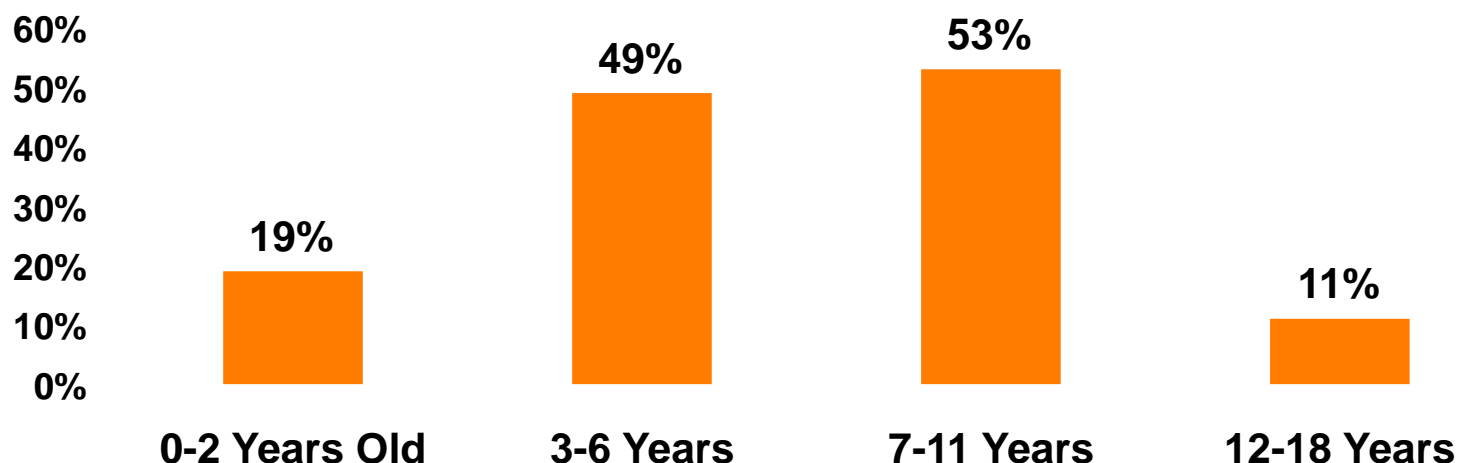
Travel Companions



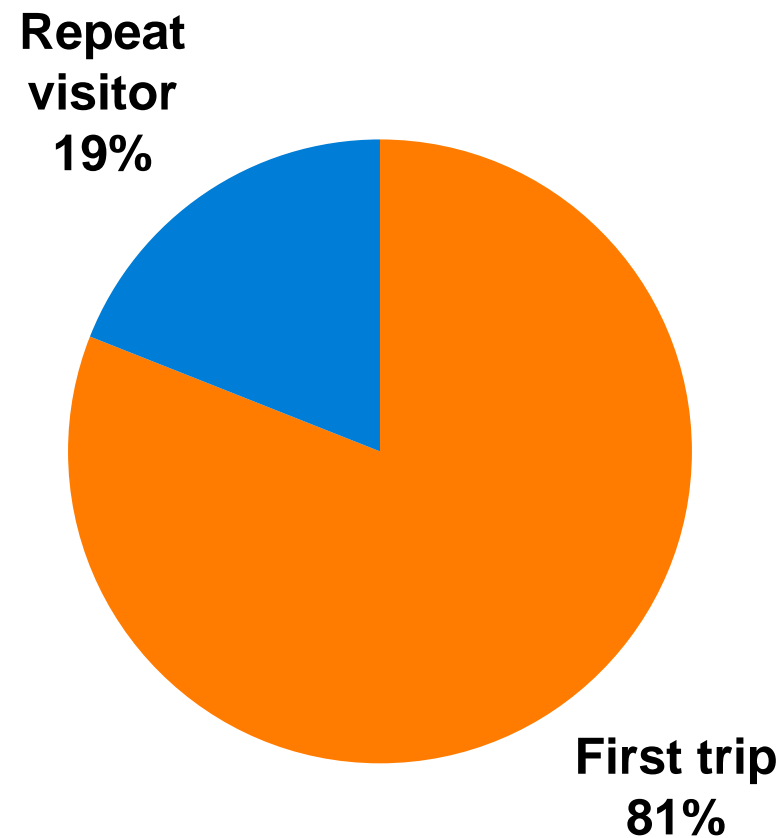
Number of Children Travel Party

N=133 total respondents traveling with children.

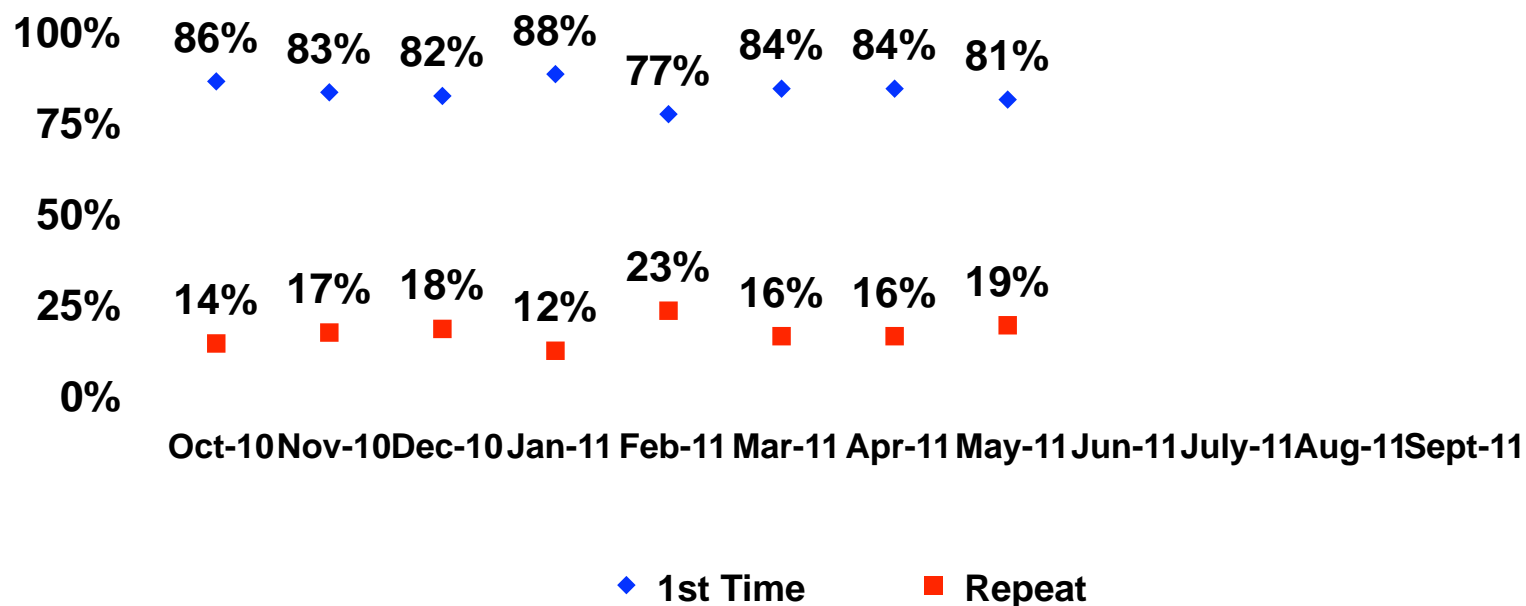
(Of those N=133 respondents, there is a total of 210 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



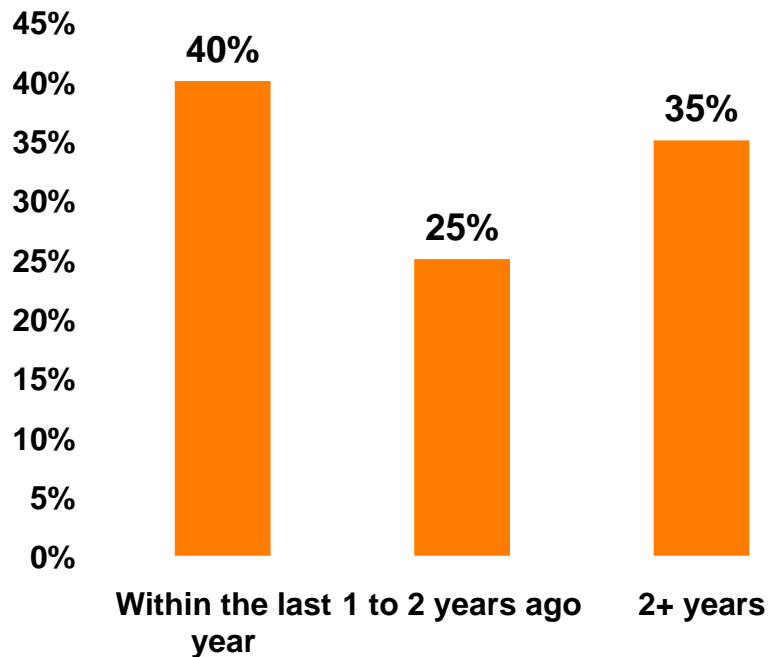
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	176	143	33
			50%	50%	49%
	Female	Count	176	141	35
			50%	50%	51%
Total	Count		352	284	68
AGE	<20	Count	2	1	1
			1%	0%	1%
	20-29	Count	79	73	6
			22%	26%	9%
	30-39	Count	199	161	38
			57%	57%	56%
	40-49	Count	56	39	17
			16%	14%	25%
	50+	Count	16	10	6
			5%	4%	9%
Total	Count		352	284	68

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

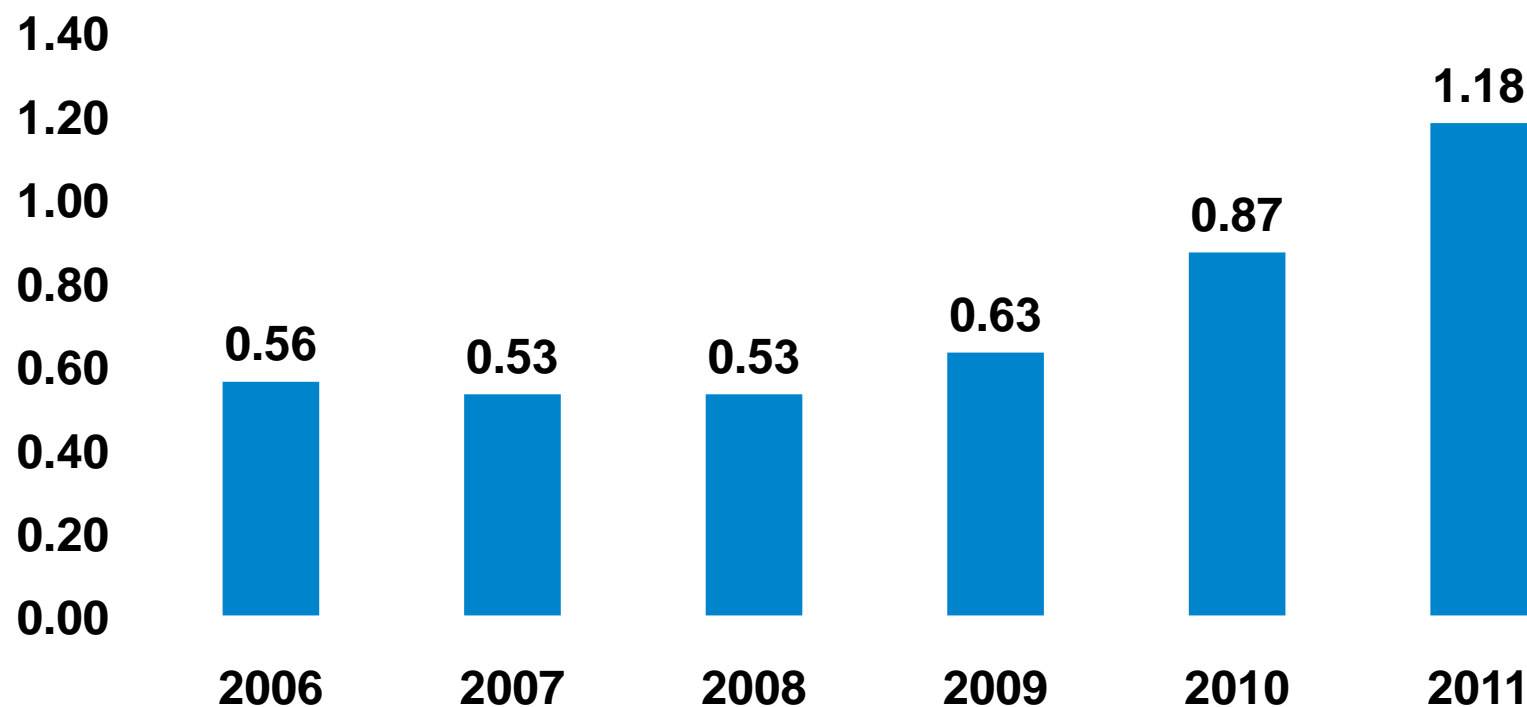
Repeat Visitors Last Trip

n = 68

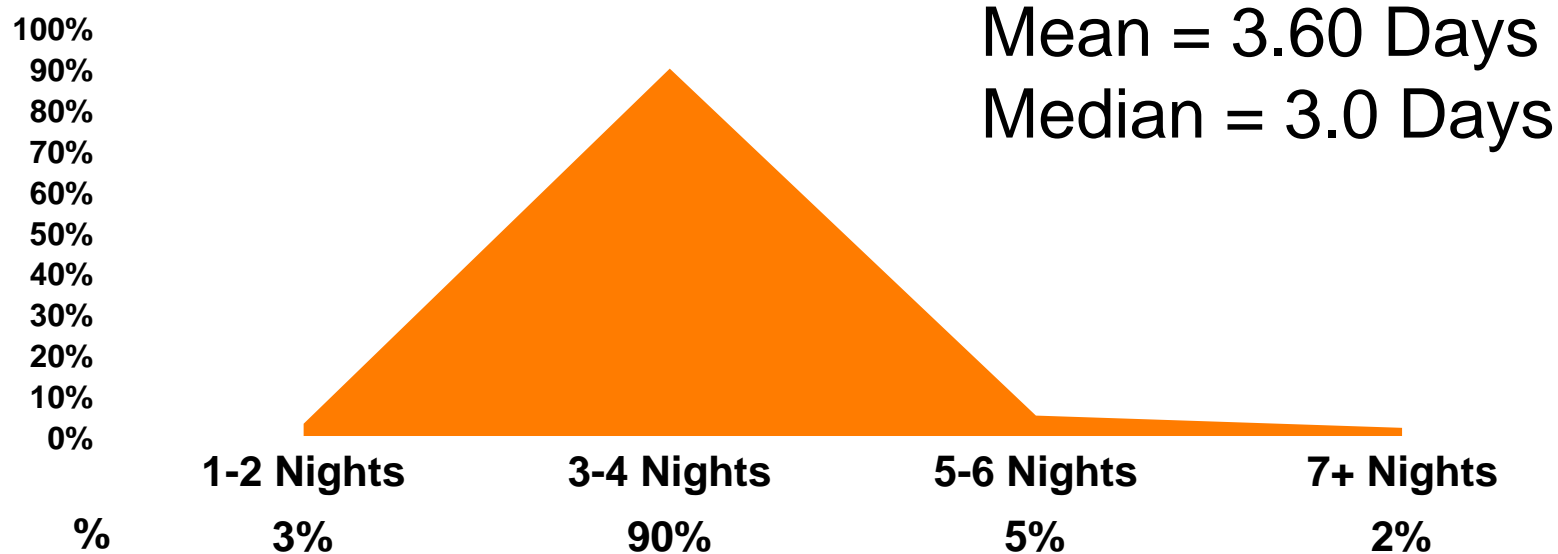


- The average repeat visitor has been to Guam 2.8 times.
- Roughly half of the repeat visitors have been to Guam within the last 2 years.

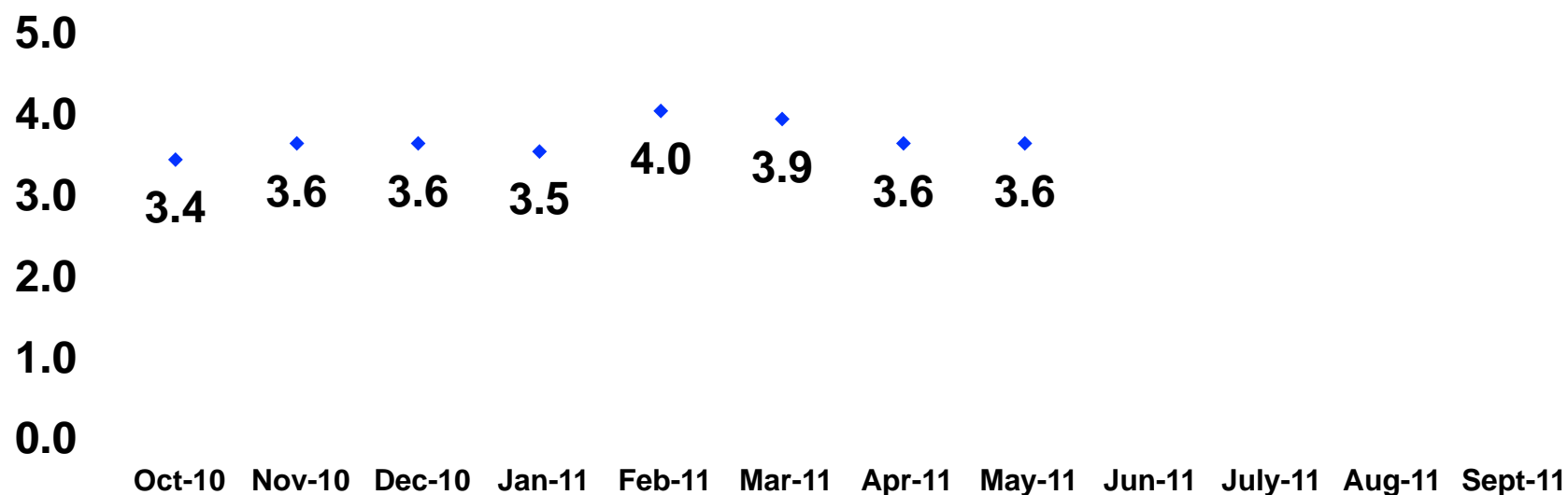
Average Number Overnight Trips (2005-2011) (2 nights or more)



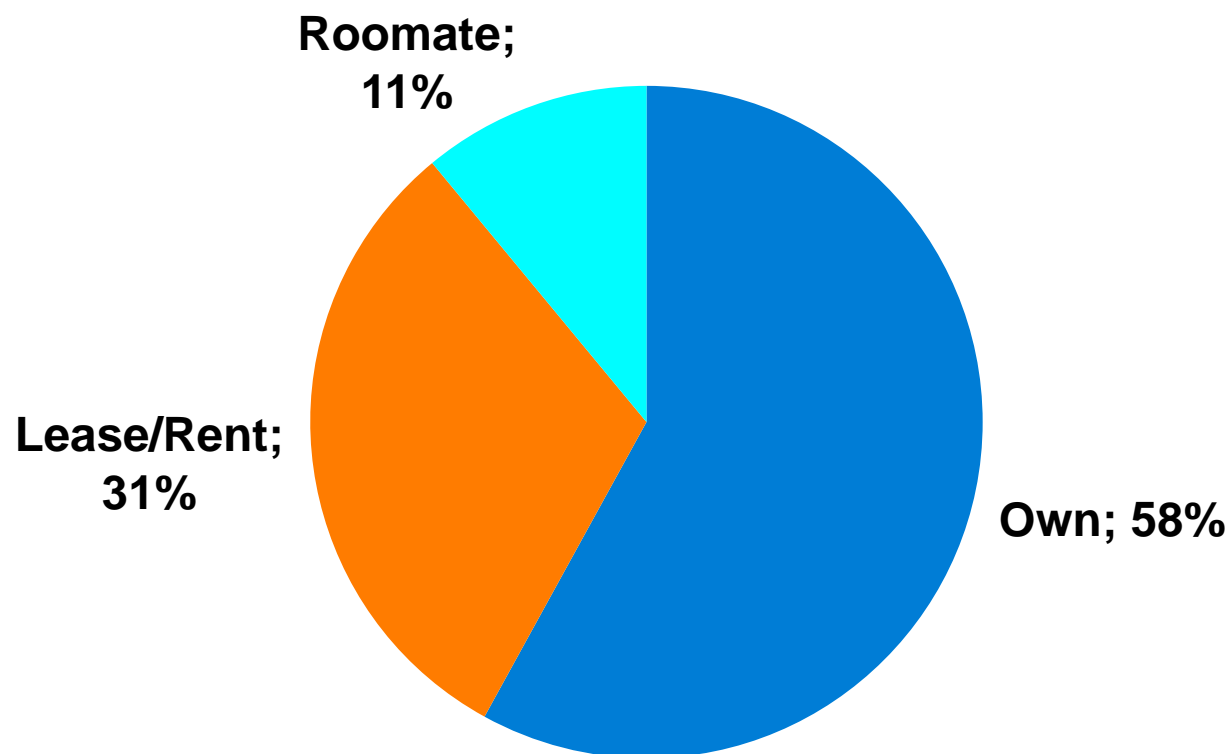
Length of Stay



Average Length of Stay



Living Accommodations

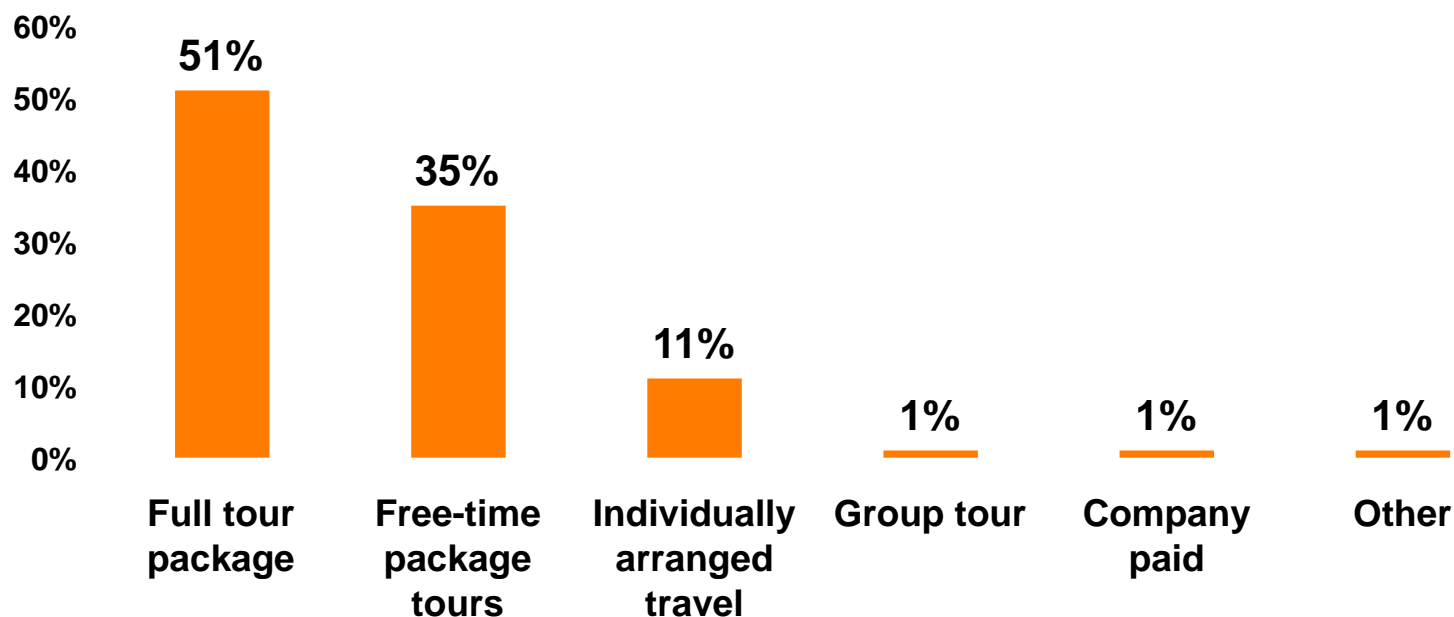


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	31%	28%	36%	37%	28%	
	Self-employed	13%	12%	11%	13%	17%	8%
	Homemaker	13%	8%	11%	14%	13%	31%
	Prof/Specialist/Tech	13%	12%	11%	12%	17%	
	Service worker	4%	8%	7%	3%	2%	
	Professor/Teacher	4%	12%	5%	3%	3%	
	Manager	3%		3%	2%	6%	
	Student	3%		2%	3%	2%	23%
	Free-lancer	2%		2%	2%	3%	8%
	Other	2%	8%	1%	1%	3%	
	Sales/Clerical	2%	4%	1%	3%	2%	
	Govt - Office/non-mgr	2%		4%	1%	1%	
	Unemployed	2%	4%	1%			31%
	Govt-Exec	1%		2%	1%	2%	
	Skilled worker	1%	4%	2%	1%		
	Judicial	1%				2%	
	Govt-Mgr	0%		1%			
	Retired	0%			1%		
Total	Count	350	25	100	90	116	13

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

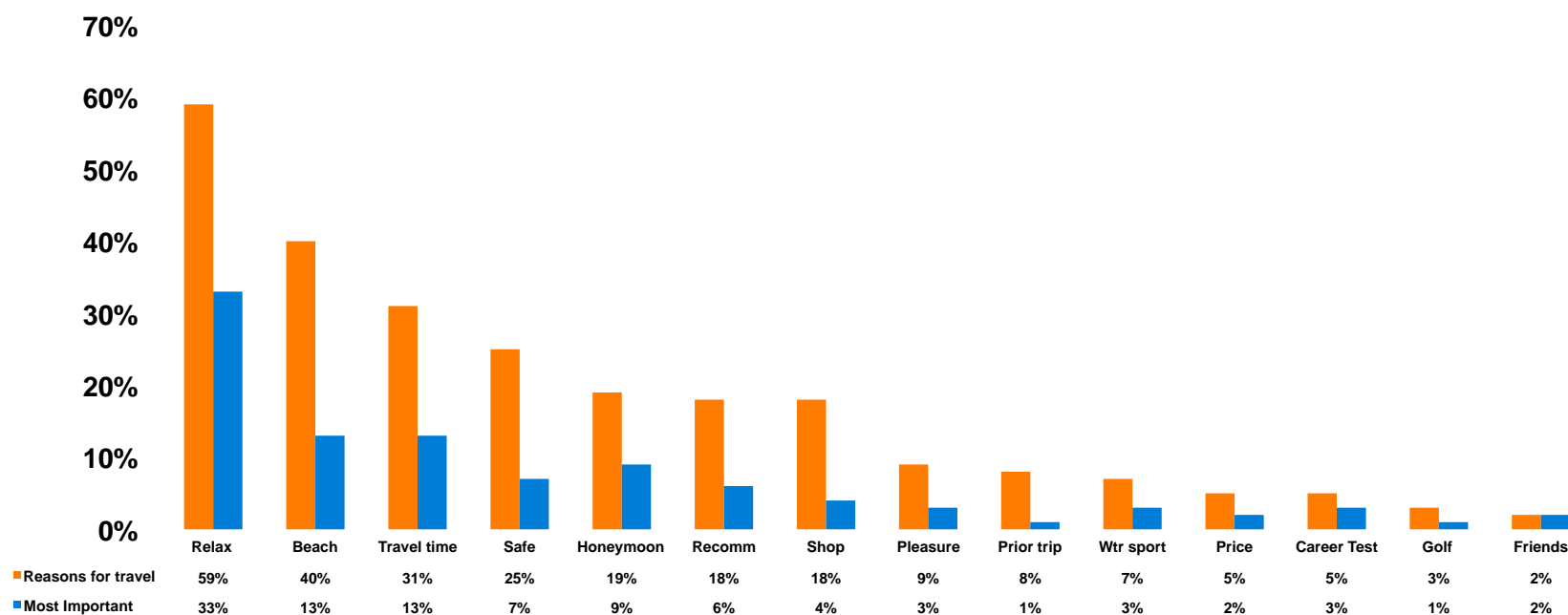


Accommodation by Income

Average length of stay: 3.60 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	48%	28%	41%	51%	58%	38%
	Hyatt Regency Guam	17%	20%	22%	14%	15%	
	The Westin Resort Guam	5%	4%	5%	4%	7%	
	Sheraton Laguna Resort	4%	12%	5%	4%	2%	
	Holiday Resort Guam	4%	8%	5%	4%	1%	8%
	Hilton Guam Resort & Spa	3%		5%	4%		23%
	Hotel Nikko Guam	3%	4%	1%	1%	4%	15%
	Relatives, Friends, Home Stay	3%	4%	1%	3%	3%	8%
	Leo Palace Resort	3%		2%	2%	4%	
	Outrigger Guam Resort	2%		5%	3%		
	Onward Beach Resort	2%		3%	2%	1%	
	Royal Orchid Guam	1%		2%	1%	1%	
	Guam Reef Hotel	1%	4%		1%	2%	
	Fiesta Resort Guam	1%		1%	2%	1%	
	Hotel Sane Fe	1%	8%	1%			
	Bayview Hotel	1%	4%			1%	
	Apartment	1%		1%		1%	
	Ramada Suites Guam	1%	4%				8%
	Japan Plaza Hotel	0%		1%			
Total	Count	351	25	101	90	116	13

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	59%	100%	49%	62%	64%	50%	55%	63%
	Beautiful seas, beaches, tropical climate	40%	50%	42%	40%	41%	19%	38%	41%
	Short travel time	31%	50%	20%	34%	38%	25%	23%	39%
	It is a safe place to spend a vacation	25%	100%	11%	26%	36%	25%	23%	26%
	Honeymoon	19%		30%	19%	7%		22%	15%
	Recommendation of friend, relative, travel agency	18%	50%	20%	19%	13%	13%	16%	20%
	Shopping	18%	100%	24%	18%	9%	13%	15%	21%
	Pleasure	9%	100%	8%	7%	20%		6%	12%
	A previous visit	8%	50%		9%	14%	19%	7%	9%
	Water sports	7%		6%	8%	7%	6%	7%	7%
	Price of the tour package	5%		3%	6%	7%	6%	4%	6%
	Career certification or testing	5%		11%	5%			7%	3%
	To golf	3%			4%	5%	6%	5%	2%
	To visit friends or relatives	2%		3%	1%	4%	13%	2%	3%
	SCUBA diving	2%		4%	2%	2%		4%	1%
	Company or Business trip	2%		5%	1%			2%	1%
	Other	2%			1%	7%		2%	1%
	My company sponsored me	1%		4%	1%			1%	2%
	Organized Sporting Activity	1%			1%	4%		1%	1%
	Promotional materials from GVB	1%		3%				1%	1%
	To get married or Attend wedding	0%		1%					1%
Total	Cases	351	2	79	198	56	16	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	59%	68%	39%	69%	69%	46%
	Beautiful seas, beaches, tropical climate	40%	52%	37%	36%	42%	31%
	Short travel time	31%	28%	31%	29%	36%	15%
	It is a safe place to spend a vacation	25%	4%	25%	28%	29%	15%
	Honeymoon	19%	40%	29%	17%	6%	23%
	Recommendation of friend, relative, travel agency	18%	8%	25%	17%	17%	8%
	Shopping	18%	20%	14%	20%	19%	31%
	Pleasure	9%	4%	11%	9%	9%	15%
	A previous visit	8%		3%	6%	18%	
	Water sports	7%		9%	7%	6%	8%
	Price of the tour package	5%	4%	6%	3%	5%	8%
	Career certification or testing	5%	8%	4%	6%	4%	8%
	To golf	3%		3%	1%	6%	8%
	To visit friends or relatives	2%		1%	3%	3%	8%
	SCUBA diving	2%	4%	3%	2%	1%	8%
	Company or Business trip	2%	12%	1%	2%		
	Other	2%		1%		4%	
	My company sponsored me	1%	8%	1%		1%	
	Organized Sporting Activity	1%		1%	1%	2%	
	Promotional materials from GVB	1%		1%	1%		
To get married or Attend wedding	0%		1%				
Total	Cases	351	25	102	90	115	13

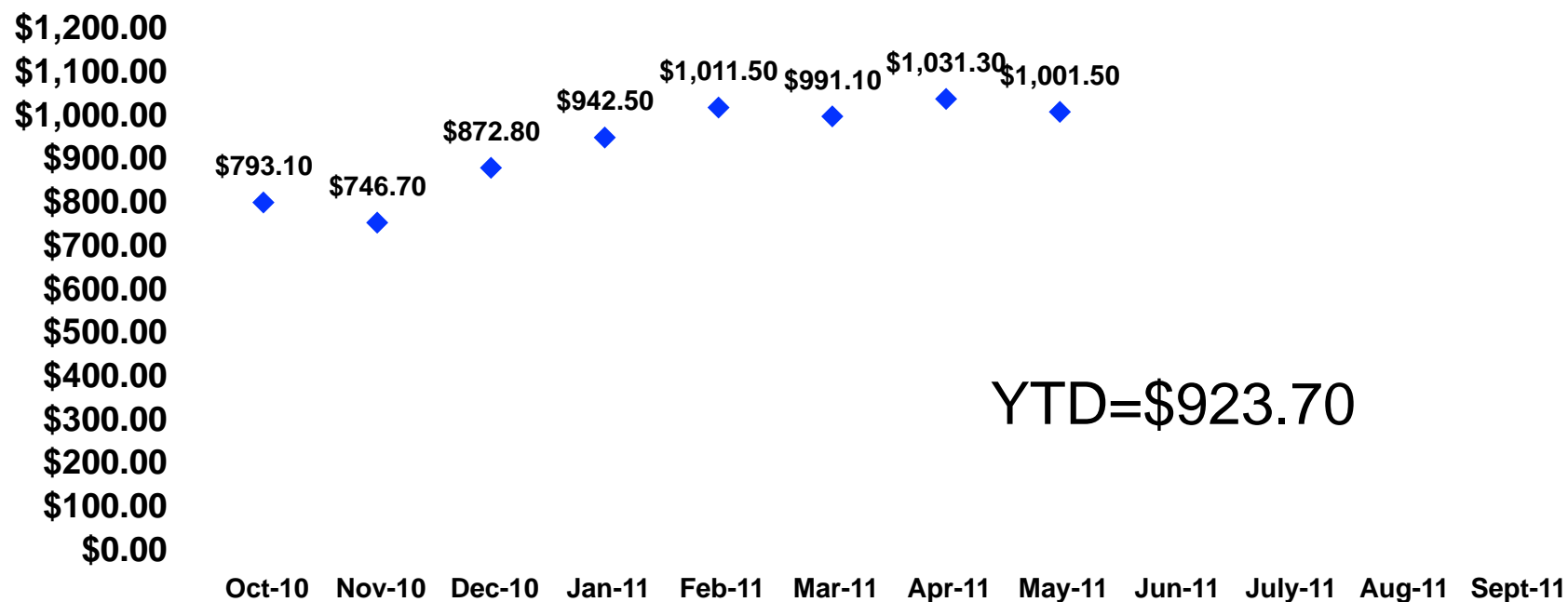
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1082.53/US\$1

- \$2,418.50 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$15,703 = maximum (highest amount recorded for the entire sample)
- \$1,001.50 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

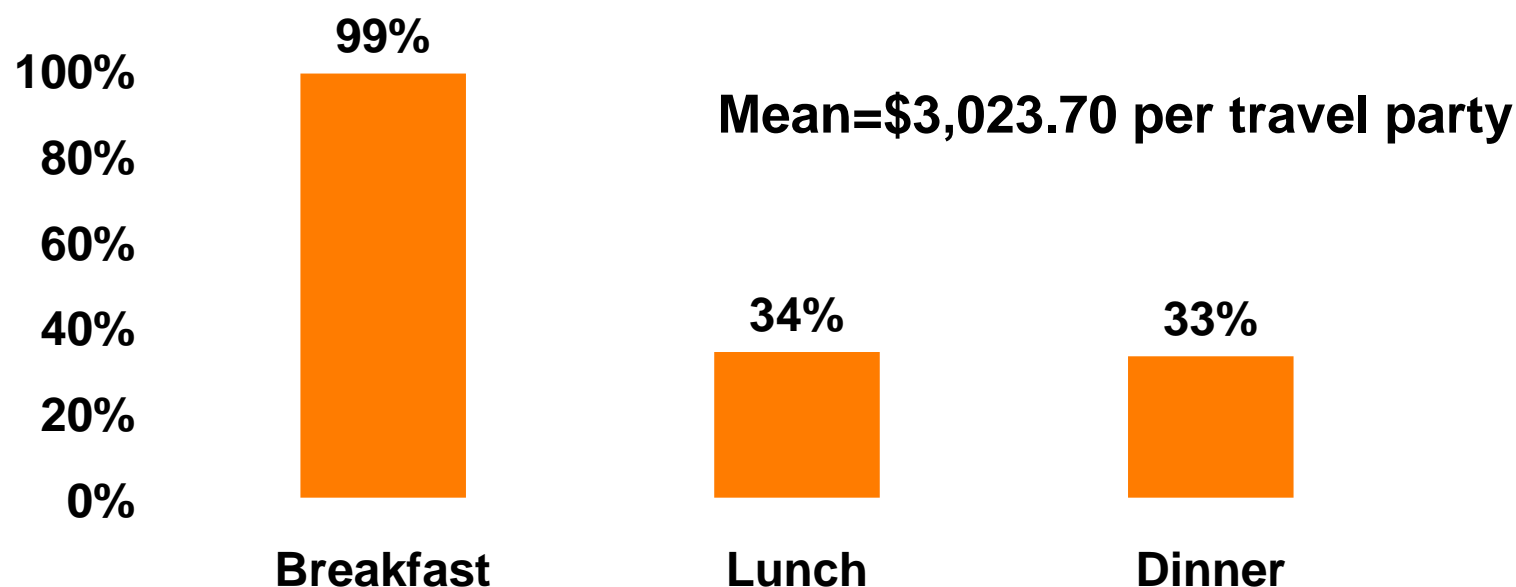
KW1082.53=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,544.40
Air & Accommodation w/ daily meal package	\$3,023.70
Air only	\$938.60
Accommodation only	\$660.50
Accommodation w/ daily meal only	\$923.90
Food & Beverages in Hotel	\$122.30
Ground transportation – Korea	\$64.70
Ground transportation – Guam	\$127.40
Optional tours/ activities	\$291.40
Other expenses	\$273.70
Total Prepaid	\$2,418.50

Prepaid Meal Breakdown

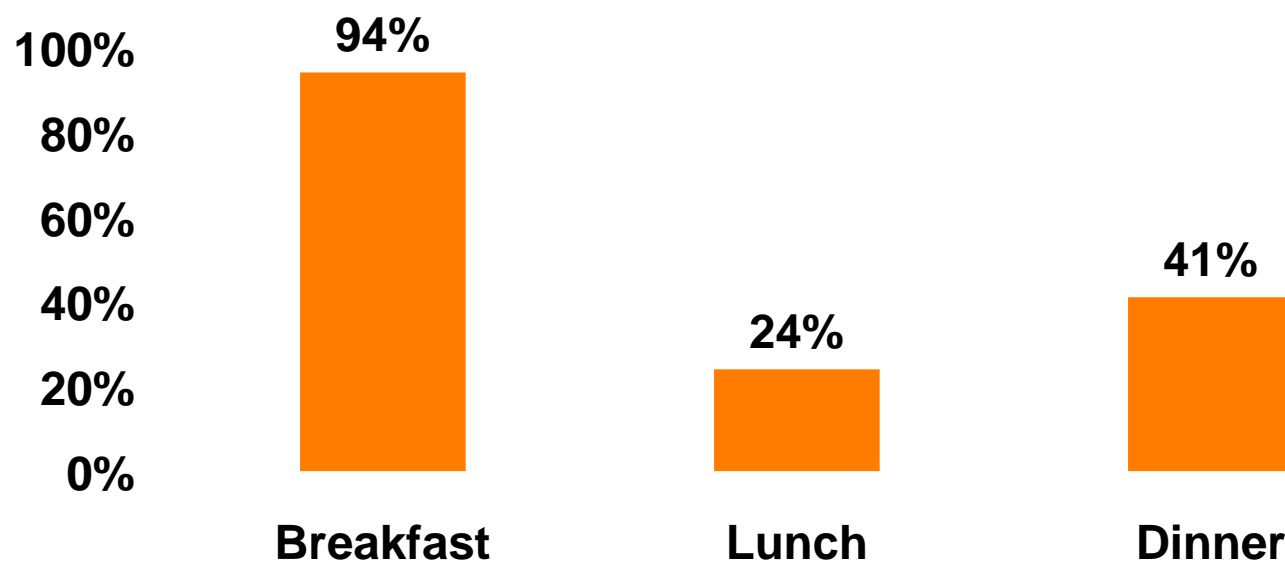
Air/ Accommodations with Daily Meal Package
n=192



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

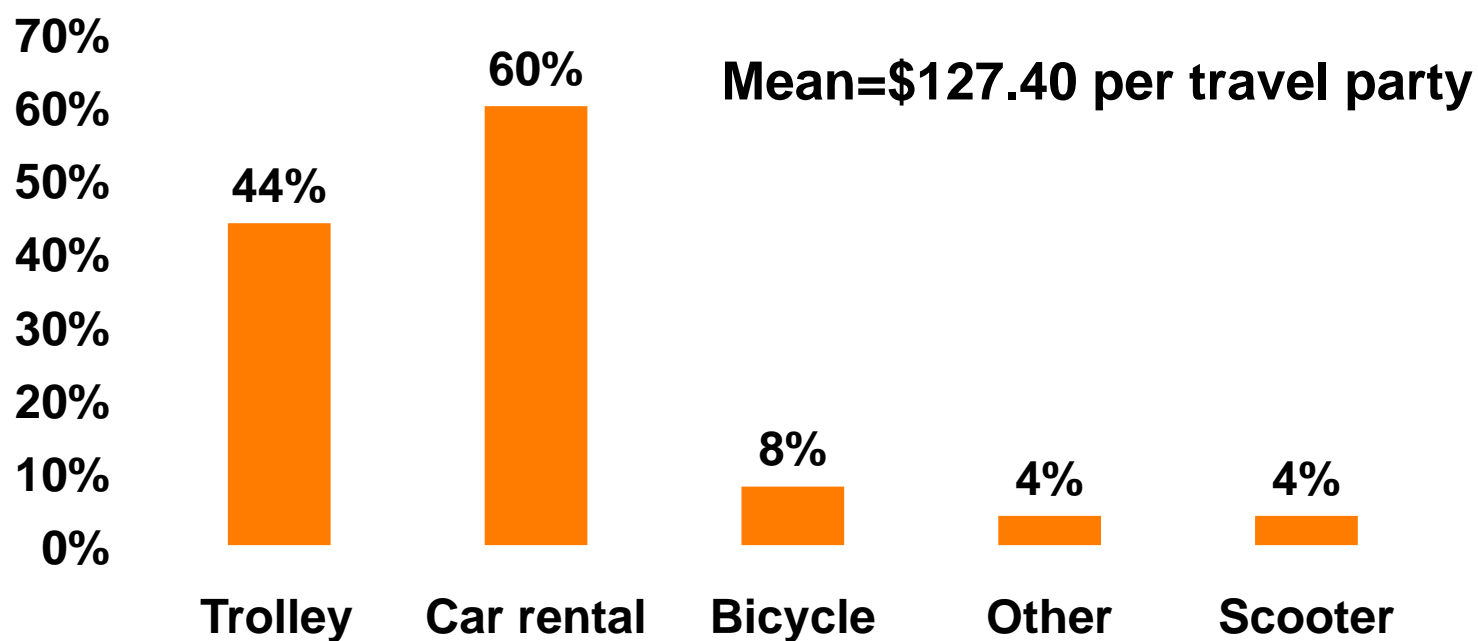
n= 17



Mean= \$923.90 per travel party

Prepaid Ground Transportation

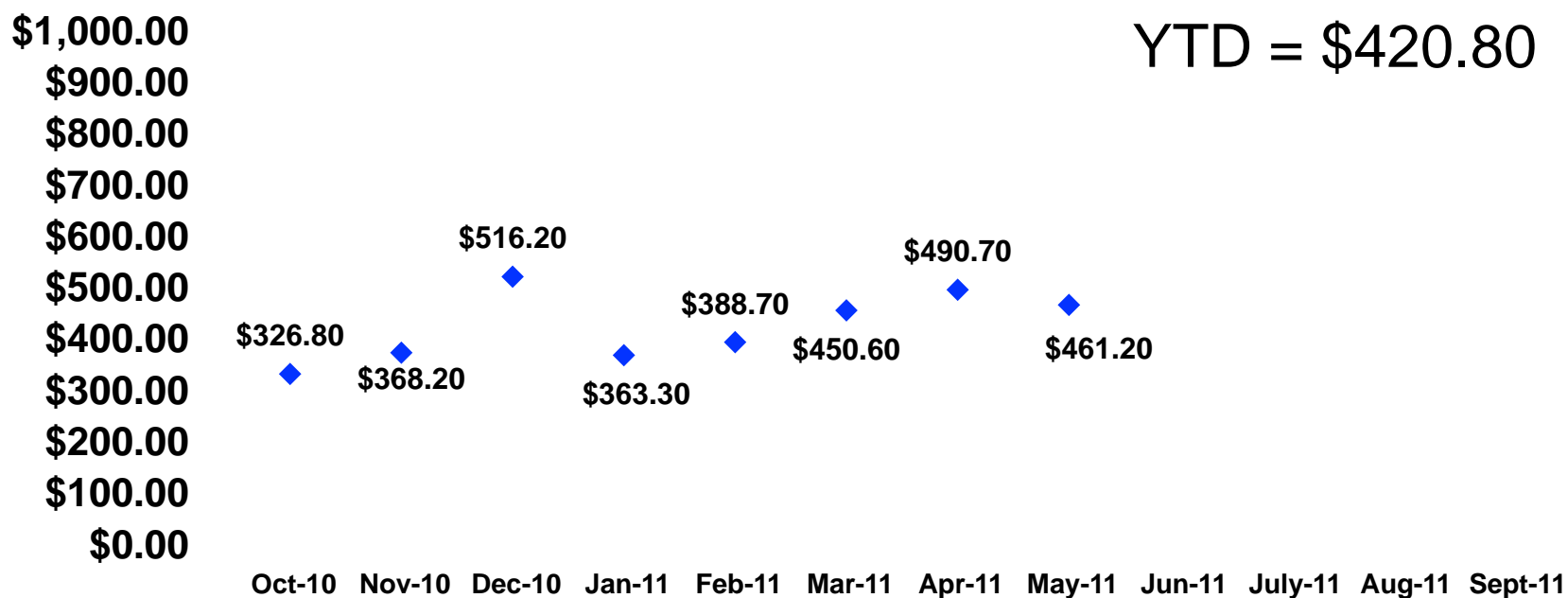
n=25



On-Island Expenditures

- \$1,146.50 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,050 = Maximum (highest amount recorded for the entire sample)
- \$461.20 = overall mean average per person on-island expenditure

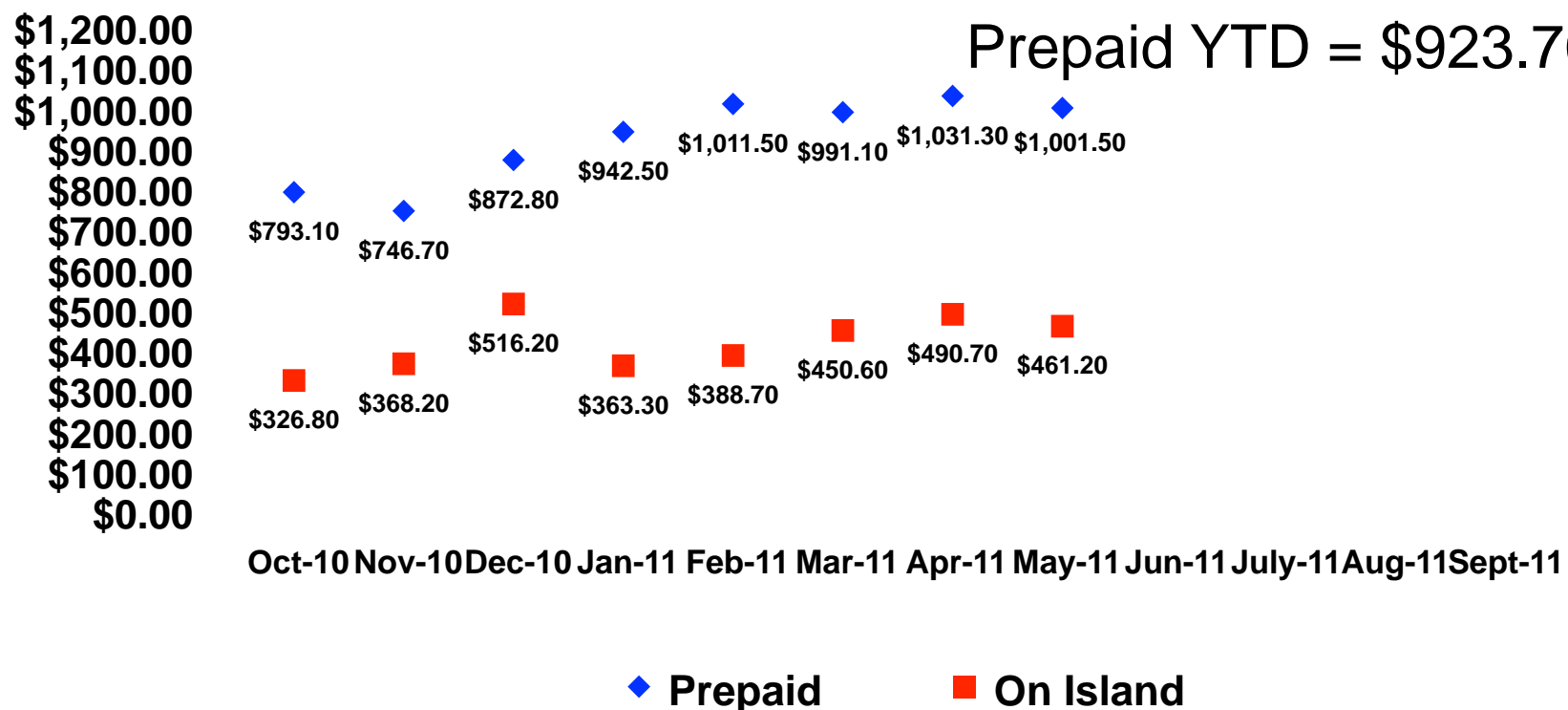
On-Island Expenditures



Prepaid & On-Island Expenditures

On-Island YTD = \$420.80

Prepaid YTD = \$923.70



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
					Male				Female				
					AGE				AGE				
					20-29	30-39	40-49	50+	<20	20-29	30-39	40-49	50+
Q.11A	Mean	\$1,146.51	\$1,283.58	\$1,009.43	\$803.89	\$1,380.03	\$1,318.08	\$1,494.00	\$1,000.00	\$864.39	\$1,129.10	\$902.88	\$816.67
	Median	\$700	\$745	\$665	\$500	\$1,000	\$725	\$500	\$1,000	\$650	\$800	\$492	\$800

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$62.57	\$74.64	\$50.50	\$0.00	\$25.10	\$78.60	\$74.31	\$15.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$38.70	\$50.05	\$27.36	\$50.00	\$21.52	\$29.92	\$66.43	\$134.38
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$65.86	\$84.85	\$46.87	\$250.00	\$65.62	\$56.56	\$54.36	\$200.00
	Median	\$0	\$0	\$0	\$250	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$126.16	\$150.19	\$102.14	\$250.00	\$82.86	\$109.60	\$205.41	\$253.13
	Median	\$0	\$0	\$0	\$250	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$337.31	\$324.85	\$349.77	\$200.00	\$243.47	\$413.69	\$279.91	\$68.75
	Median	\$12	\$5	\$23	\$200	\$0	\$100	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$141.80	\$179.92	\$103.69	\$200.00	\$110.29	\$168.87	\$105.30	\$81.25
	Median	\$0	\$0	\$0	\$200	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$32.22	\$36.39	\$28.05	\$50.00	\$35.01	\$31.07	\$40.04	\$3.13
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$343.49	\$386.31	\$300.67	\$0.00	\$258.95	\$374.86	\$323.30	\$484.38
	Median	\$20	\$0	\$30	\$0	\$0	\$10	\$70	\$275
TOTAL ON ISLAND	Mean	\$1,146.51	\$1,283.58	\$1,009.43	\$1,000.00	\$842.95	\$1,262.76	\$1,140.13	\$1,240.00
	Median	\$700	\$745	\$665	\$1,000	\$560	\$900	\$595	\$550

On-Island Expenditures

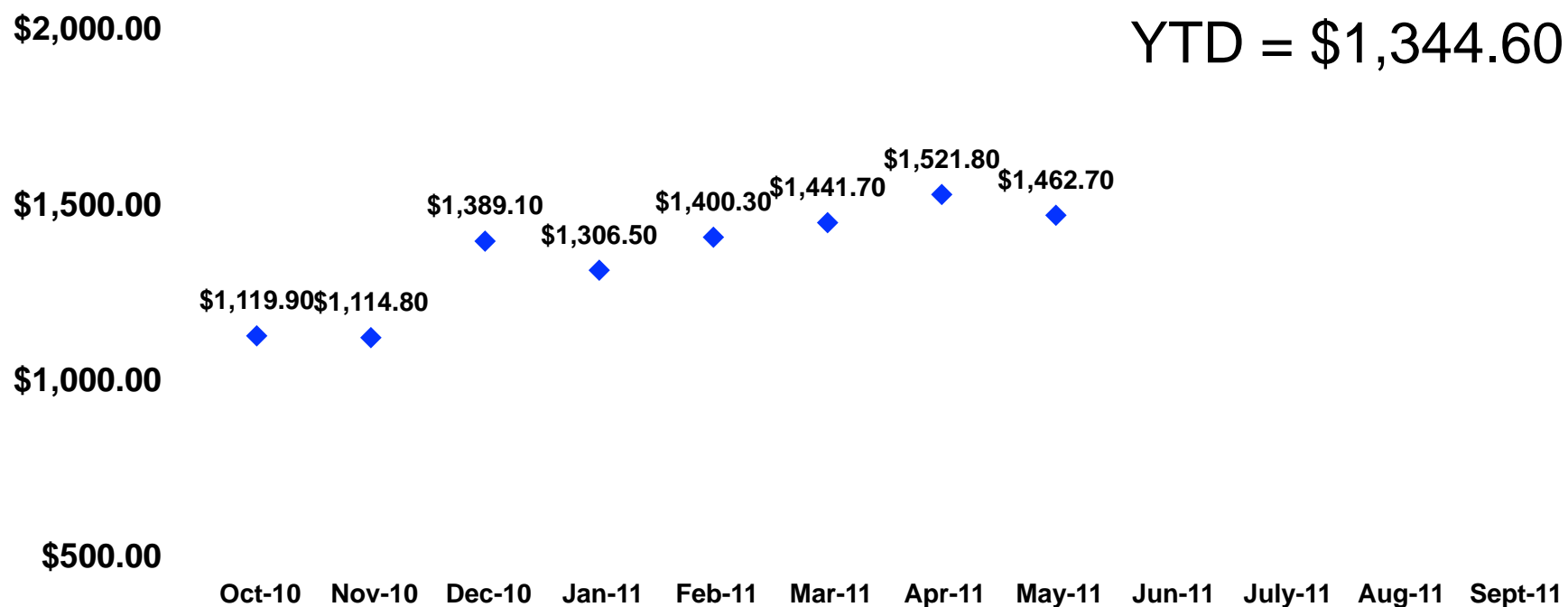
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$52.88	\$103.07
	Median	\$0	\$0
F&B-FF	Mean	\$29.91	\$75.44
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$48.88	\$136.76
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$130.79	\$106.84
TOUR	Median	\$0	\$0
GIFT/	Mean	\$327.99	\$376.25
SOUV-SELF	Median	\$50	\$0
GIFT/ SOUV-	Mean	\$137.15	\$161.25
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$29.67	\$42.88
	Median	\$0	\$0
OTHER EXP	Mean	\$334.70	\$380.21
	Median	\$20	\$0
TOTAL ON	Mean	\$1,091.48	\$1,376.34
ISLAND	Median	\$700	\$700

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,462.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,085 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

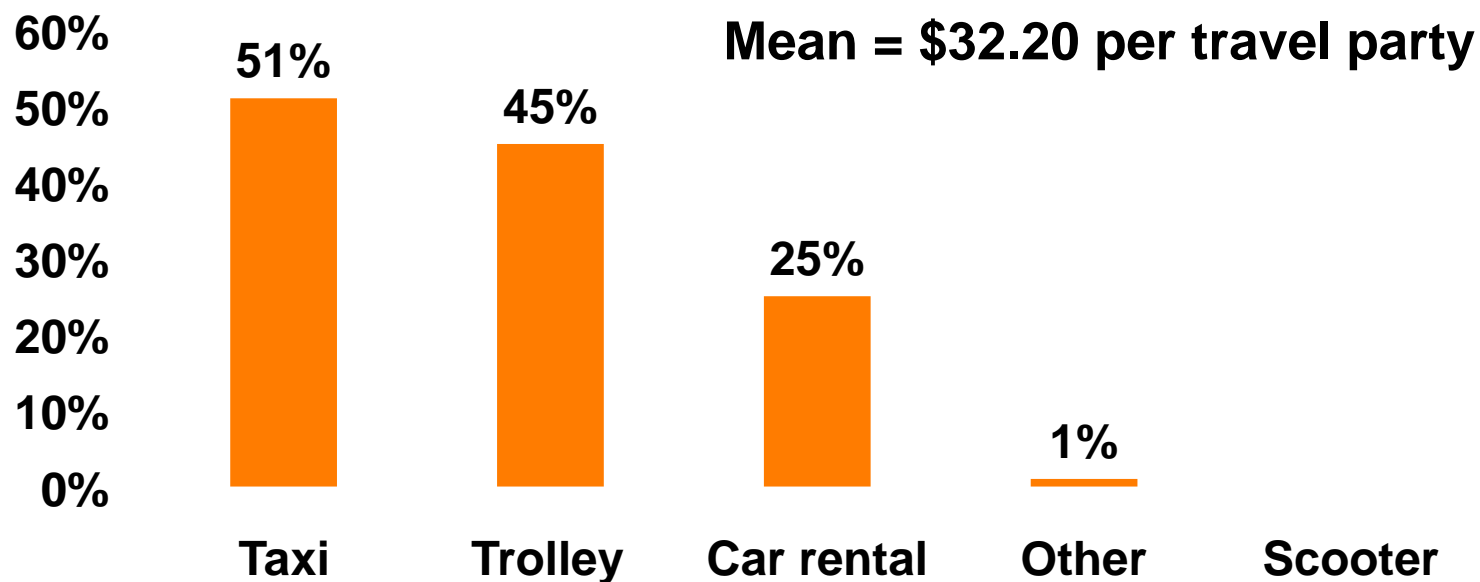


Breakdown of On-Island Expenditures

∴	MEAN \$
Food & beverage in a hotel	\$62.60
Food & beverage in fast food restaurant/ convenience store	\$38.70
Food & beverage at restaurants or drinking establishments outside a hotel	\$65.90
Optional tours and activities	\$126.20
Gifts/ souvenirs for yourself/companions	\$337.30
Gifts/ souvenirs for friends/family at home	\$141.80
Local transportation	\$32.20
Other expenses not covered	\$343.50
Average Total	\$1,146.50

Local Transportation

n=138



Guam Airport Expenditures

- \$59.30 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,500 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

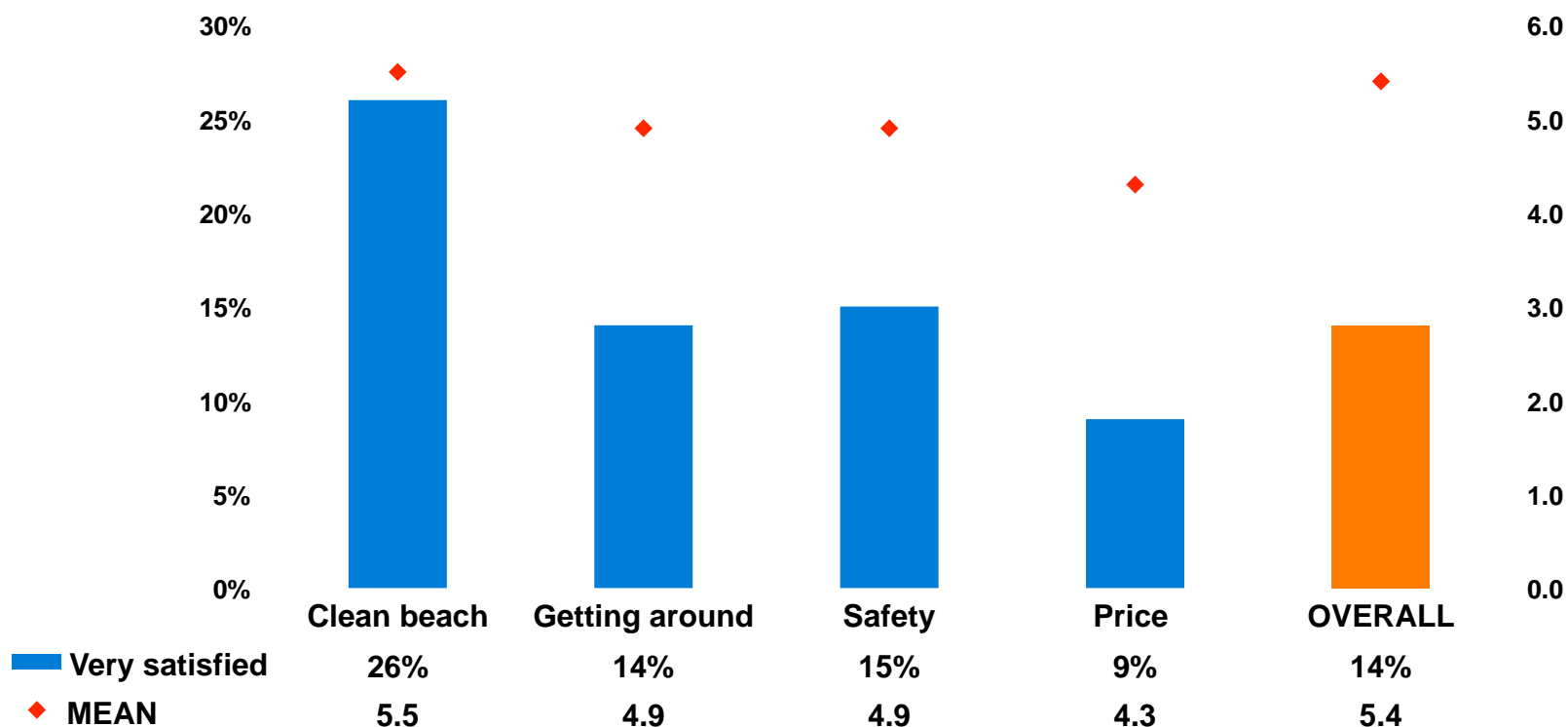
::	MEAN \$
Food & Beverages	\$6.00
Gifts/Souvenirs Self	\$29.80
Gifts/Souvenirs Others	\$23.20
Total	\$59.30

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

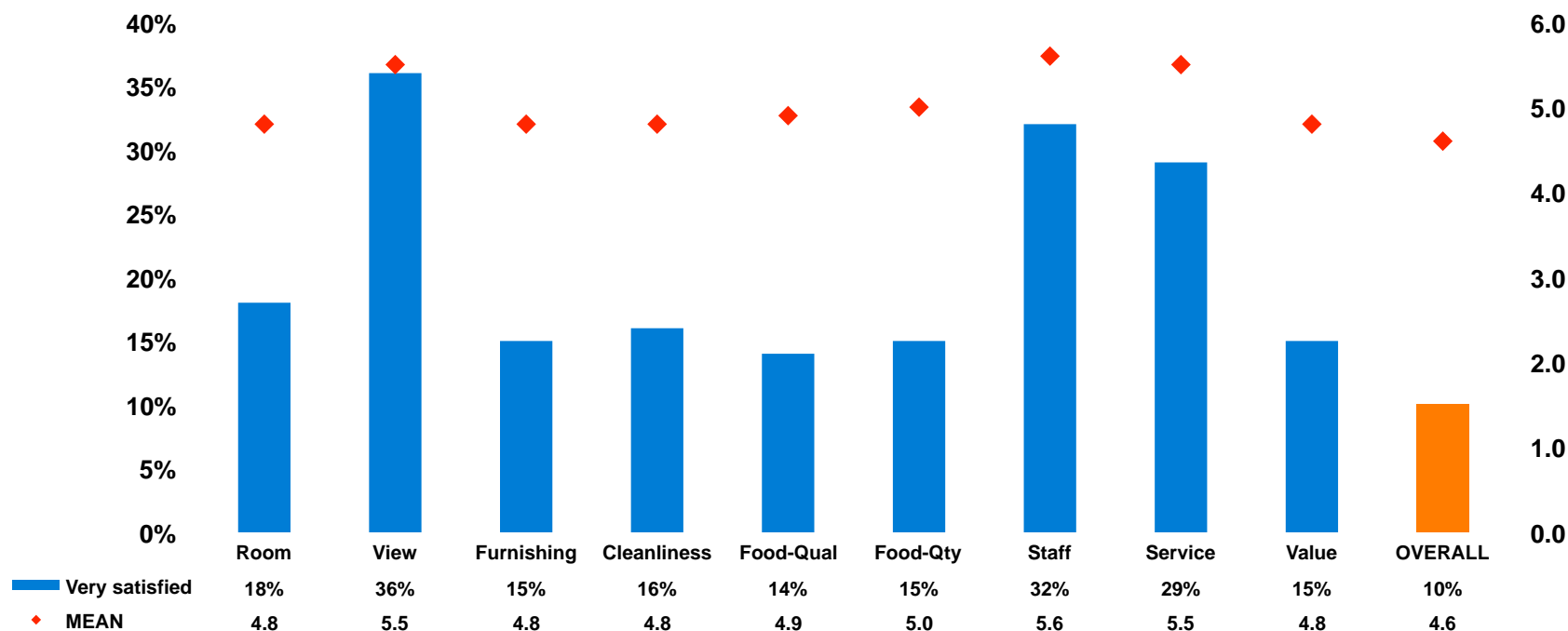
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

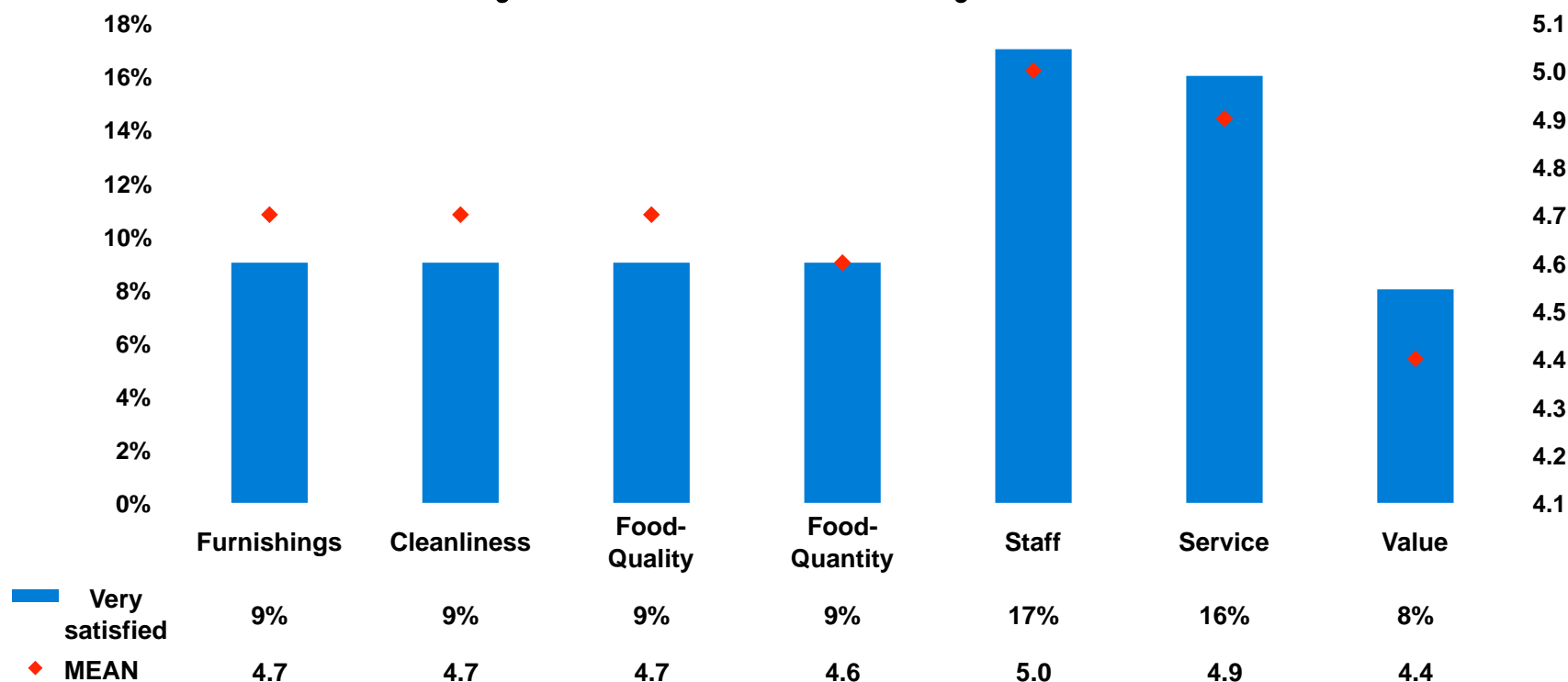
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

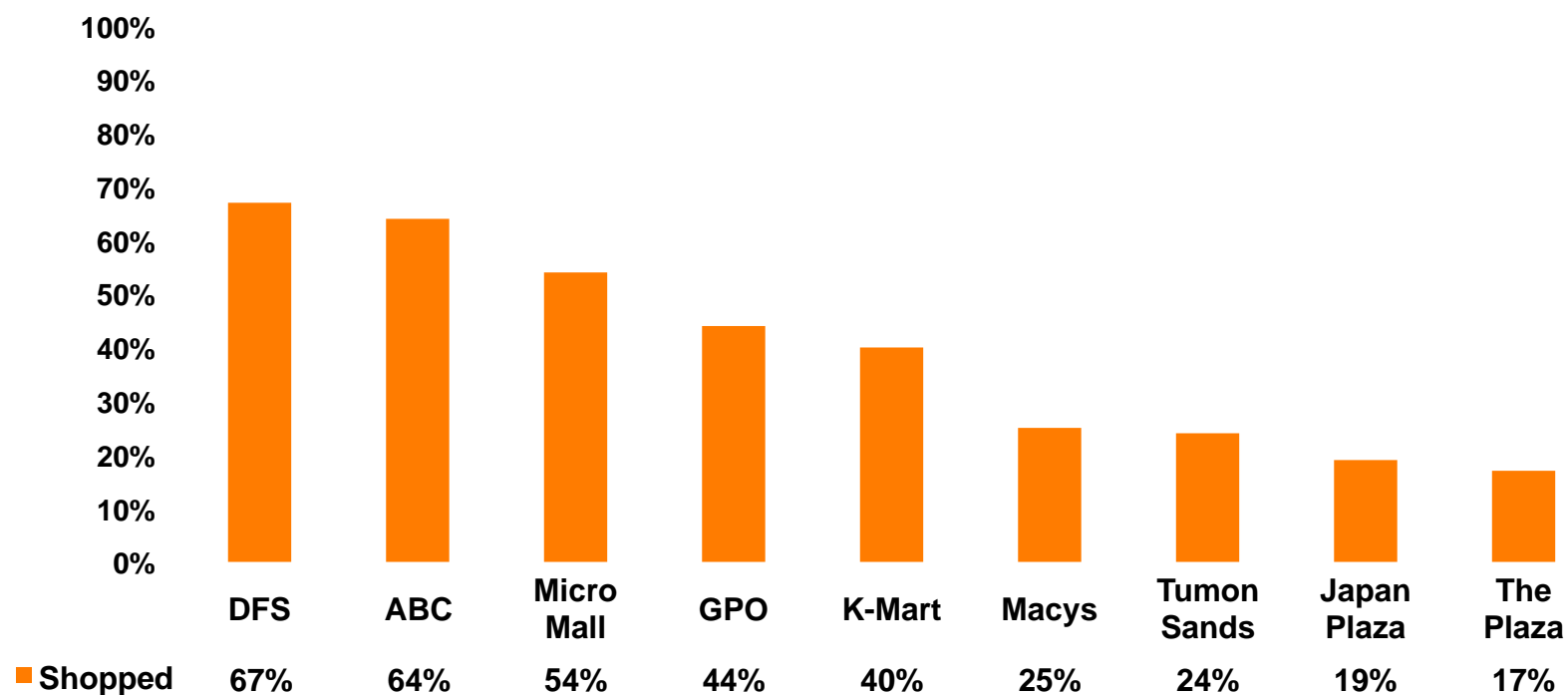
7pt Rating Scale

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

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

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

Score 1 to 3 = **11%**

MEAN = 5.1

Variety of Shopping

Score of 6 to 7 = **41%**

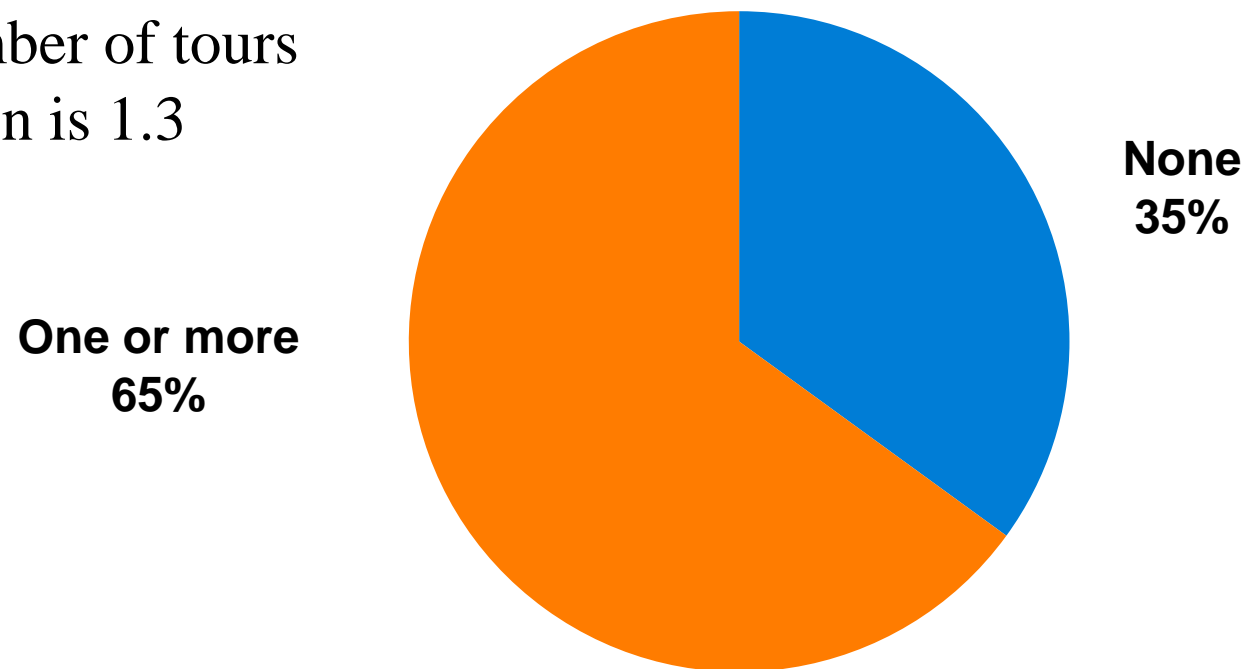
Score of 4 to 5 = **43%**

Score 1 to 3 = **15%**

MEAN = 4.9

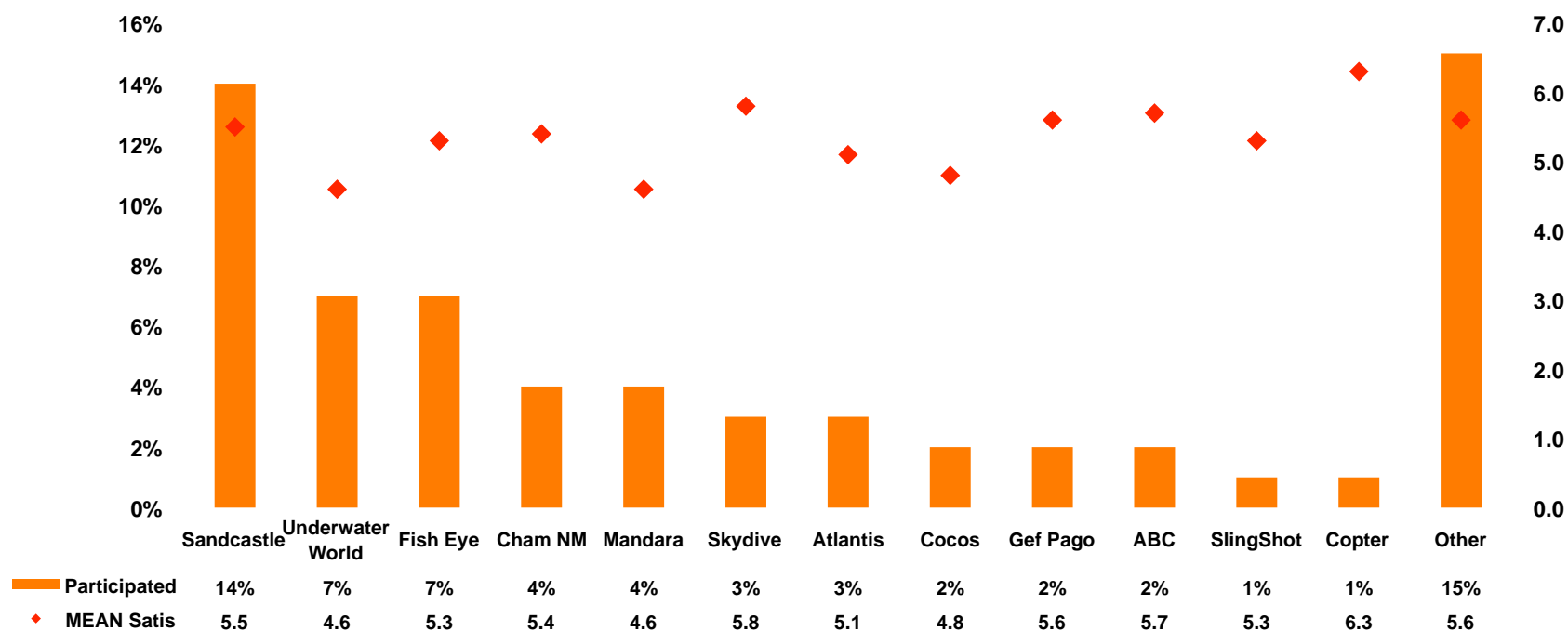
Optional Tour Participation

- Average number of tours participated in is 1.3



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 = **38%**

Score of 4 to 5 = **55%**

Score 1 to 3 = **7%**

MEAN = 5.0

Variety of Day Tour

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

Score of 4 to 5 = **53%**

Score 1 to 3 = **13%**

MEAN = 4.8

Night Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

∴

Quality of Night Tour

Score of 6 to 7 = **26%**

Score of 4 to 5 = **61%**

Score 1 to 3 = **14%**

MEAN = 4.5

Variety of Night Tour

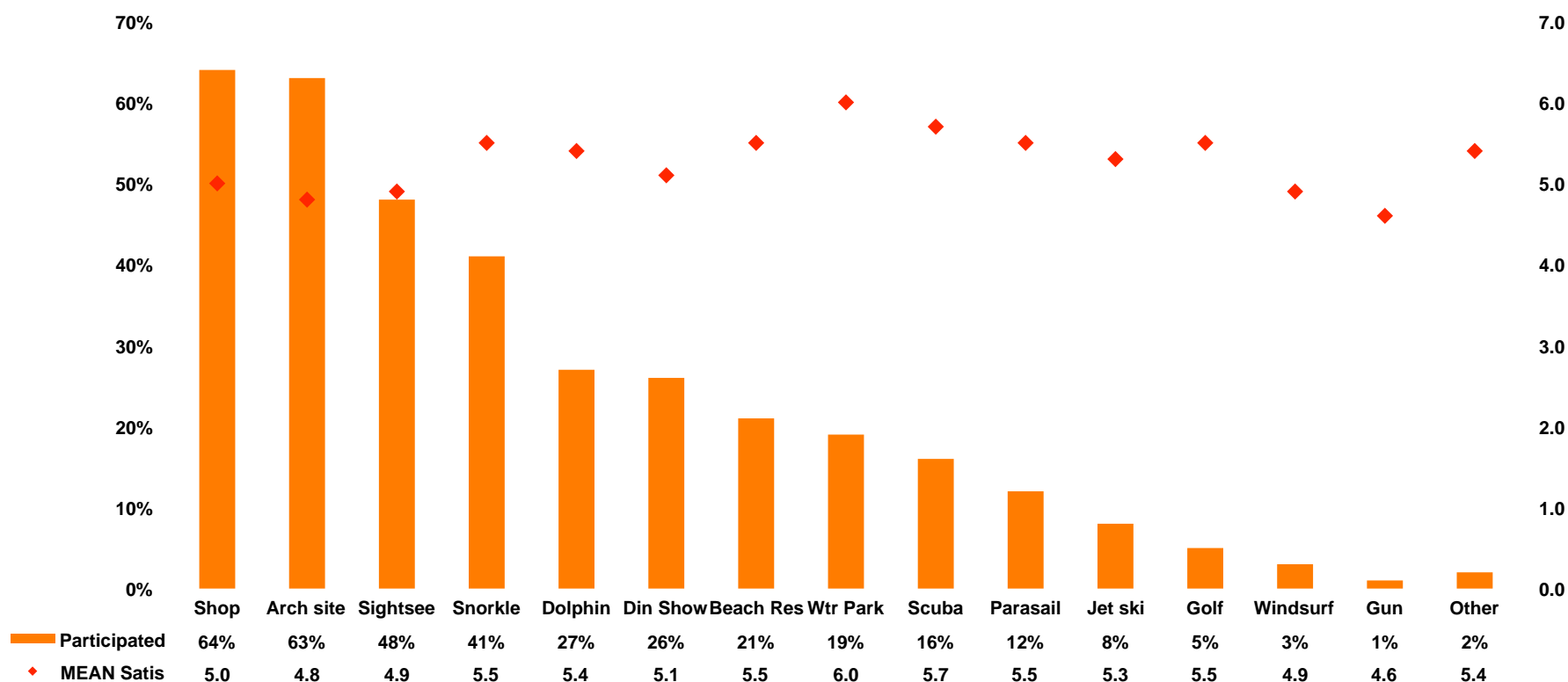
Score of 6 to 7 = **22%**

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

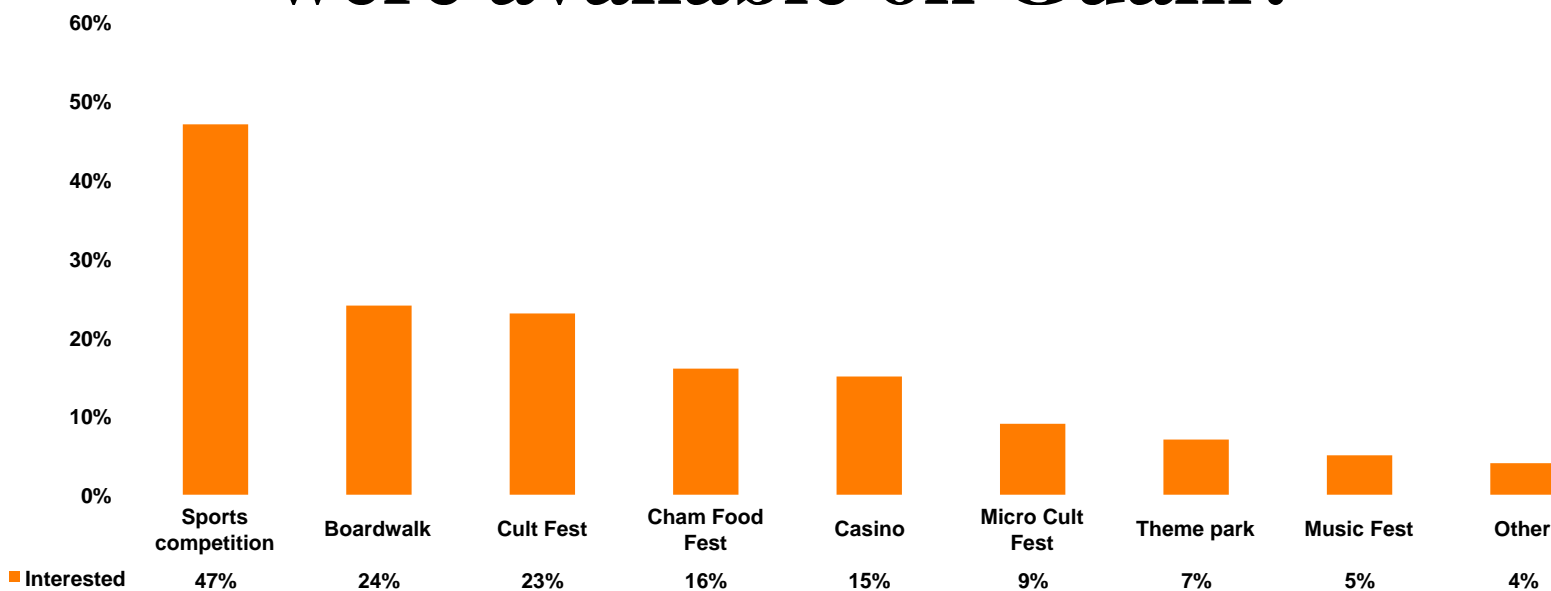
Score 1 to 3 = **20%**

MEAN = 4.3

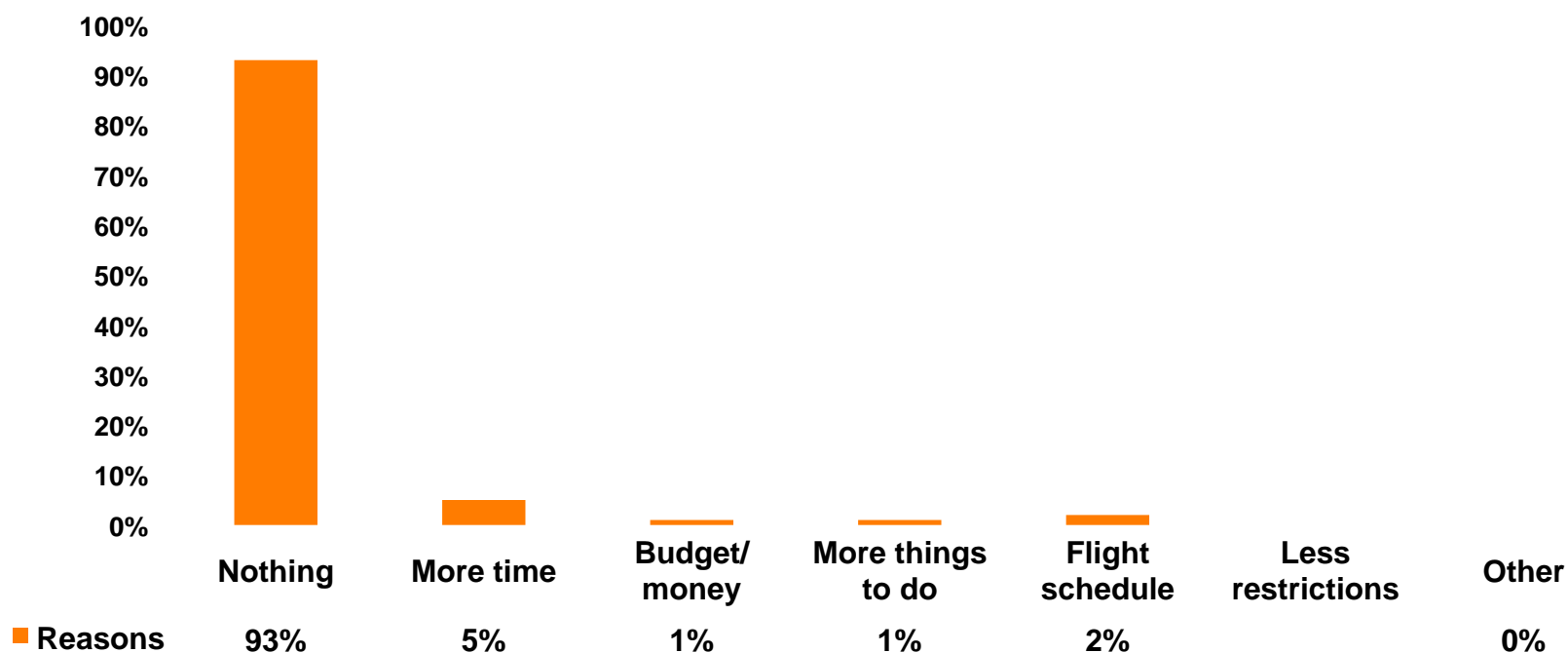
Satisfaction with Other Activities



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



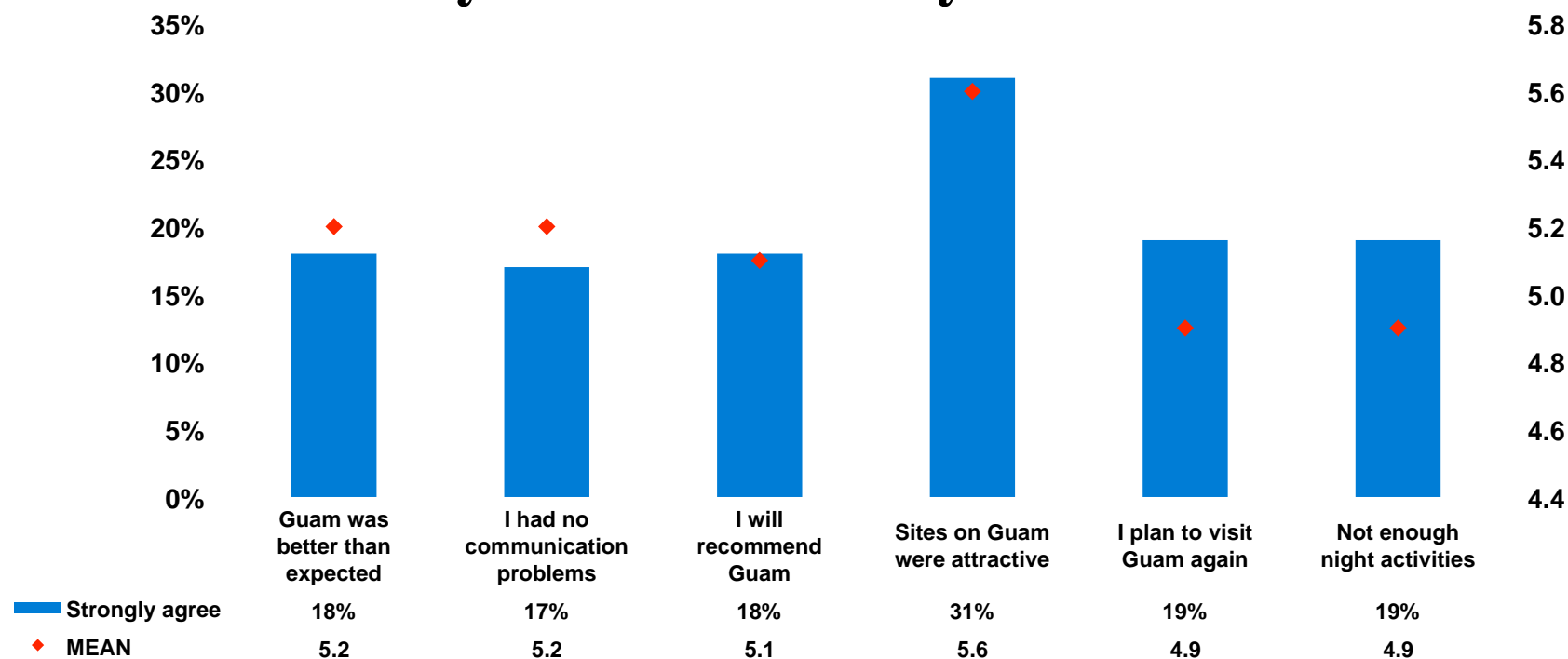
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

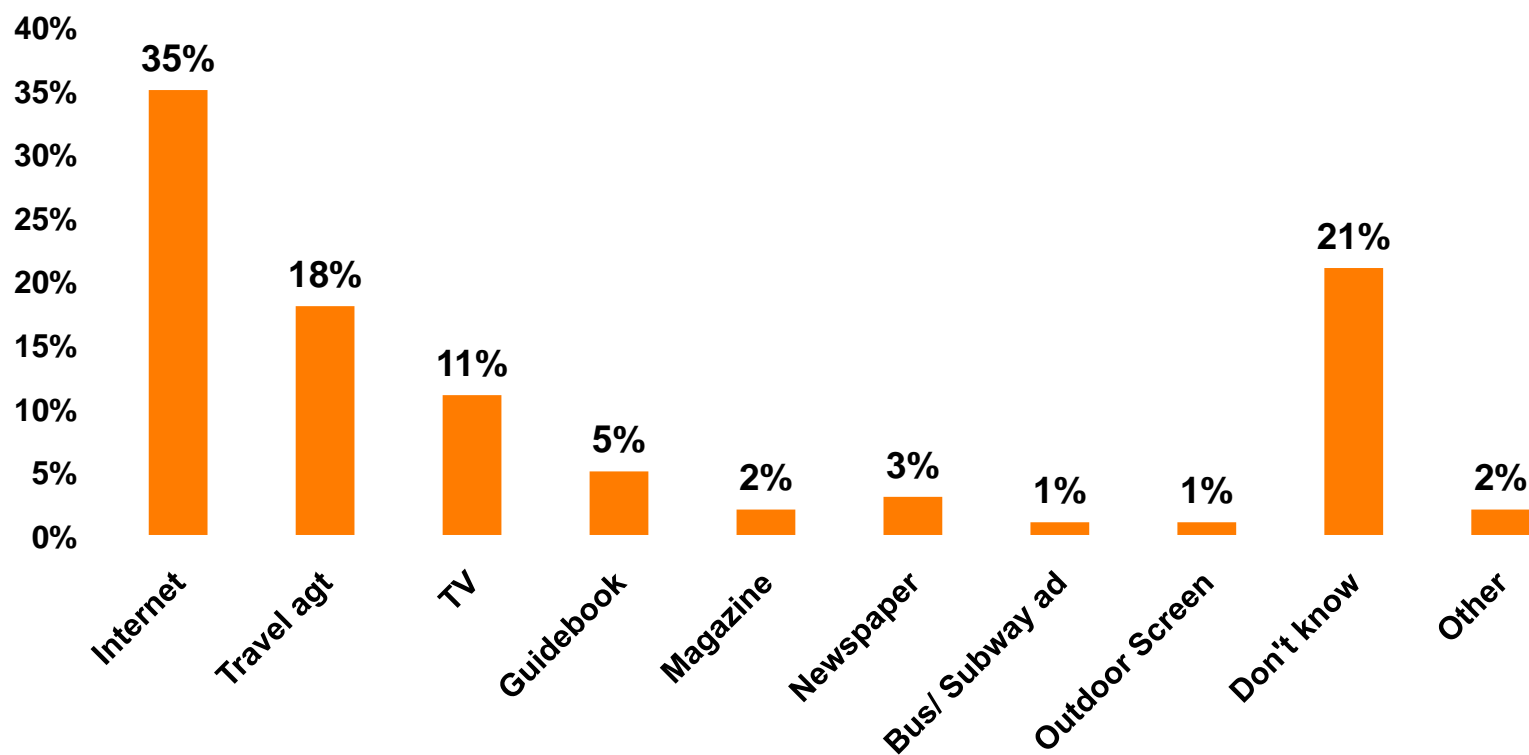
7=Very Satisfied/ 1=Very Dissatisfied



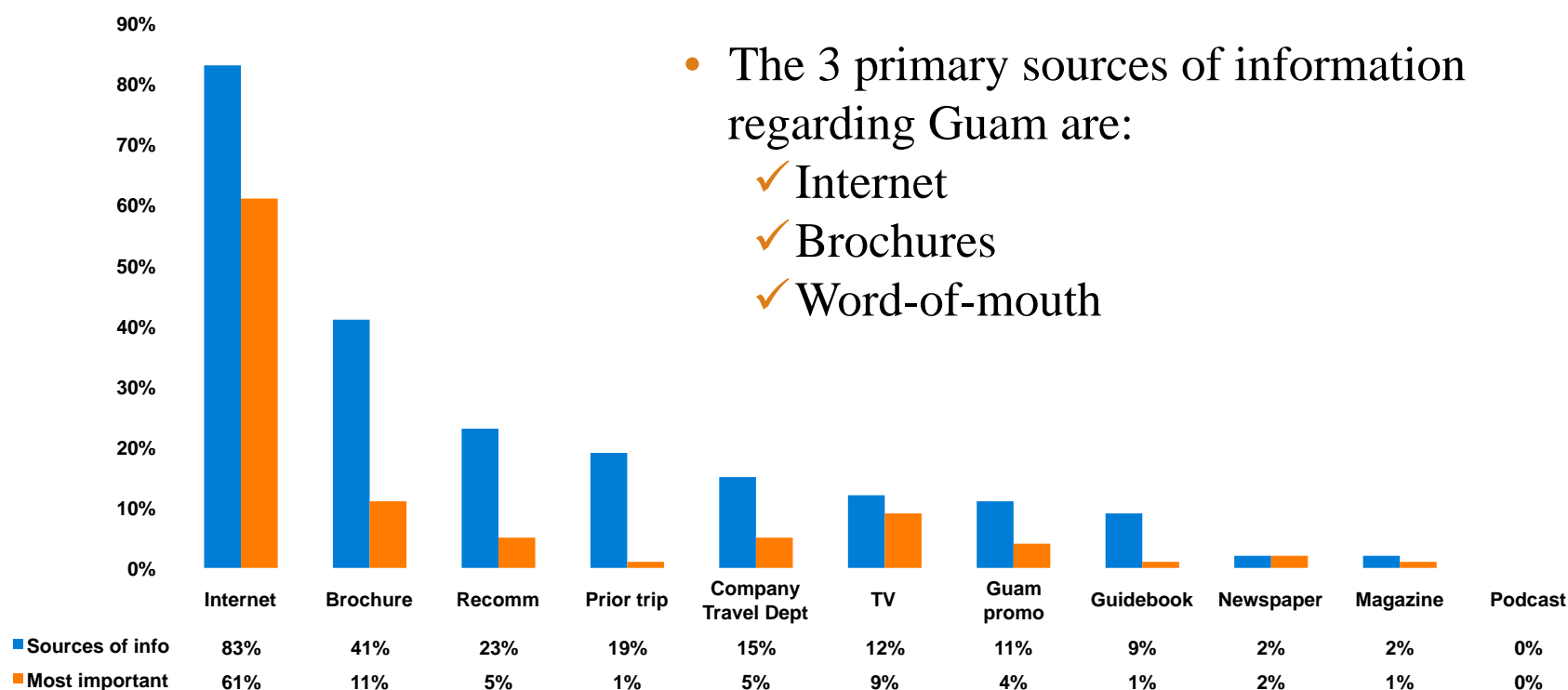
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

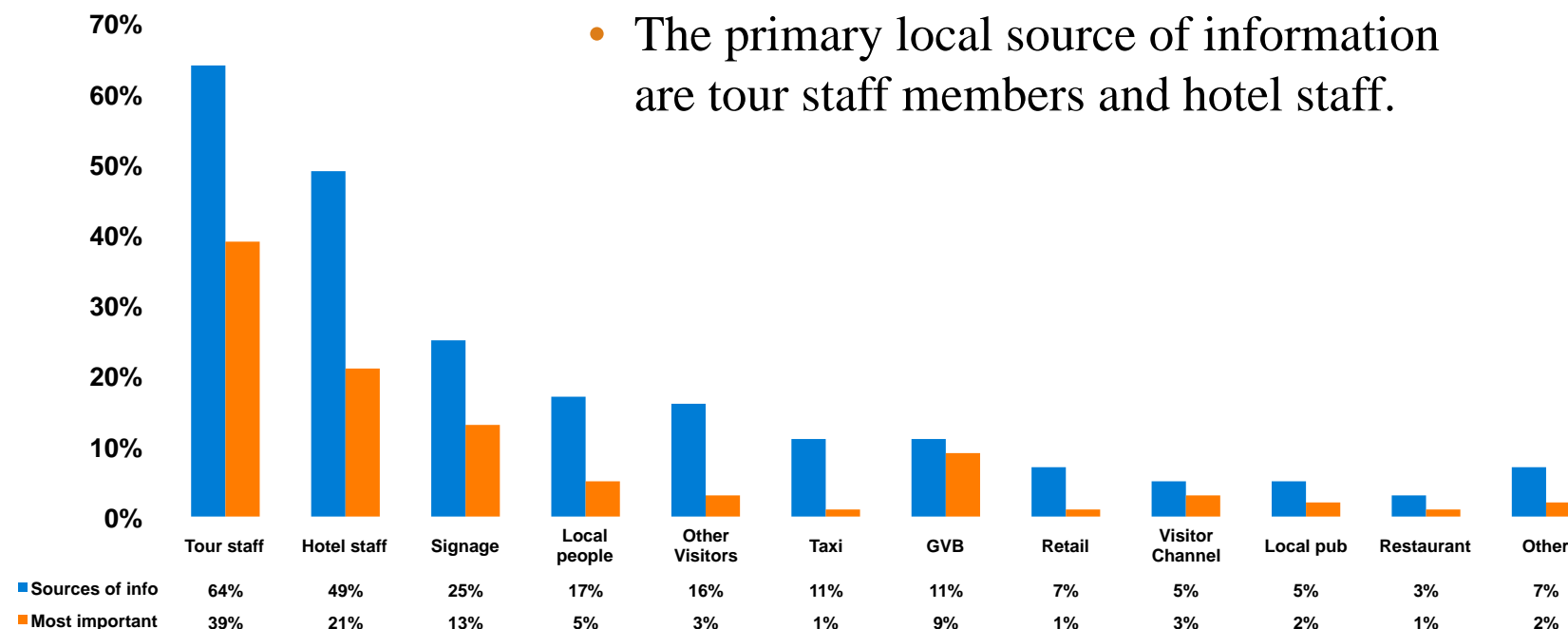
Past 90 days



Sources of Information Pre-arrival

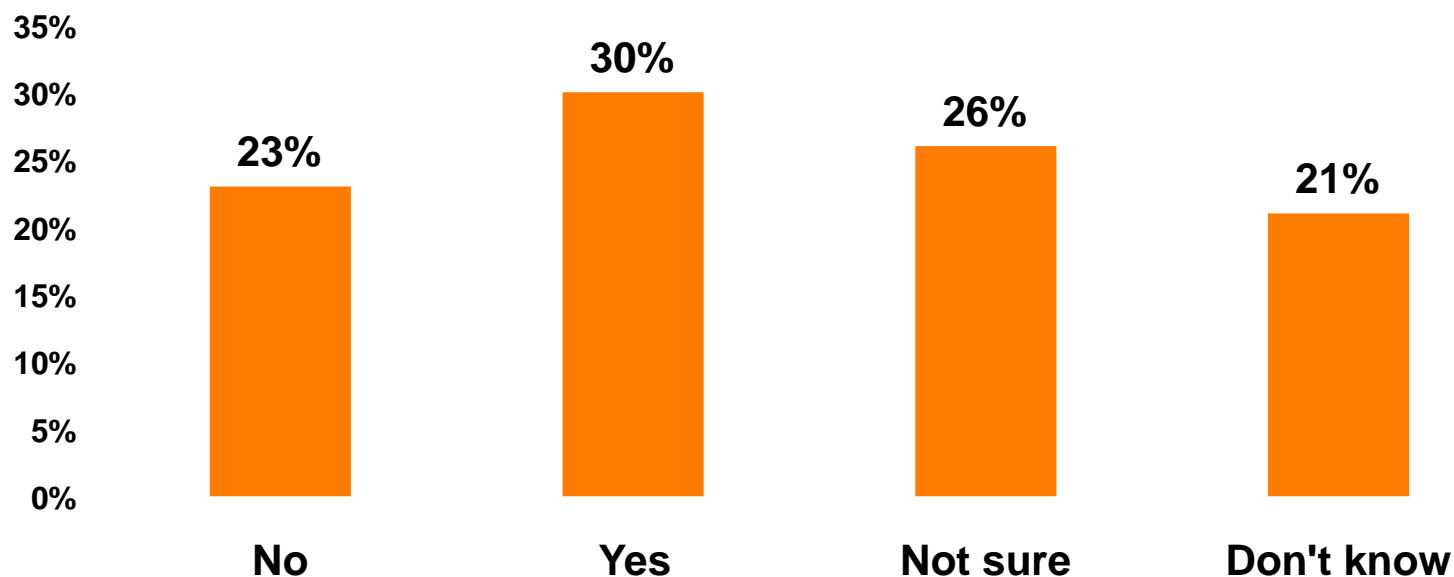


Sources of Information Post-arrival



SECTION 6 **OTHER ISSUES**

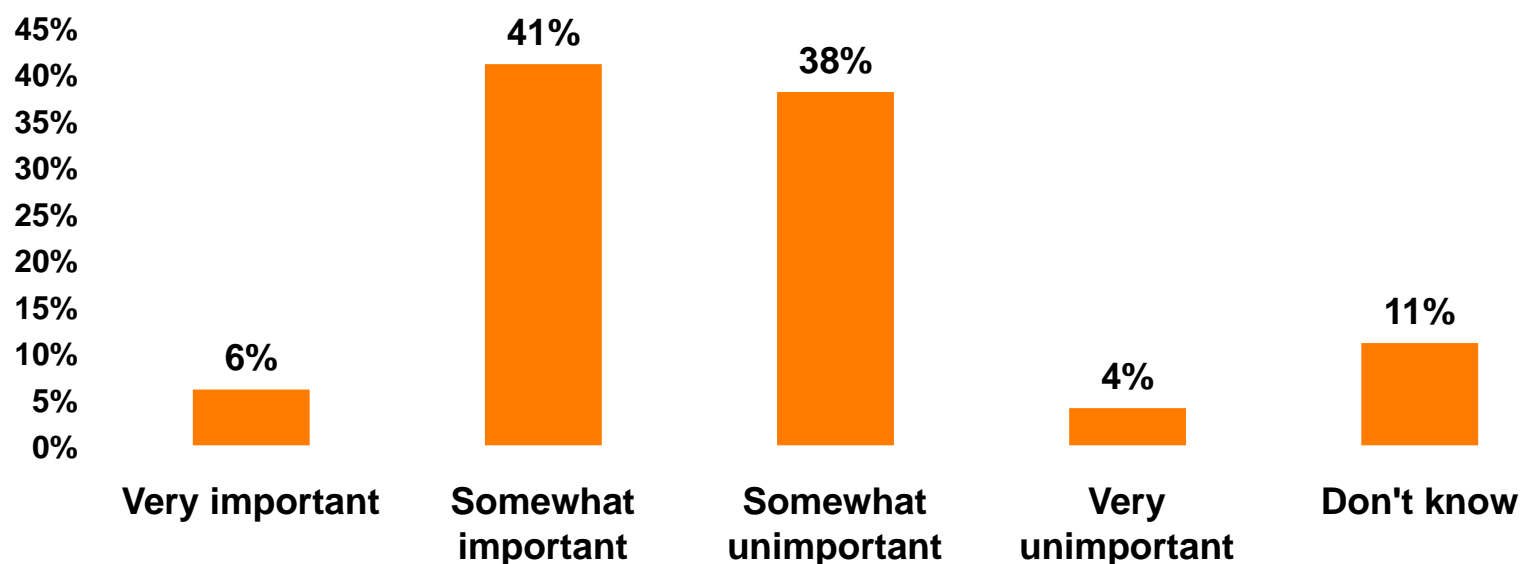
Good time to spend money on travel outside of Korea - Overall



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		22%	21%	27%	44%	32%	25%	21%	21%	23%
	Yes	50%	29%	31%	27%	38%	12%	25%	31%	38%	38%
	Not sure		18%	31%	27%	13%	24%	30%	23%	26%	8%
	Do not know	50%	32%	18%	20%	6%	32%	20%	24%	16%	31%
Total	Count	2	79	199	56	16	25	102	90	116	13

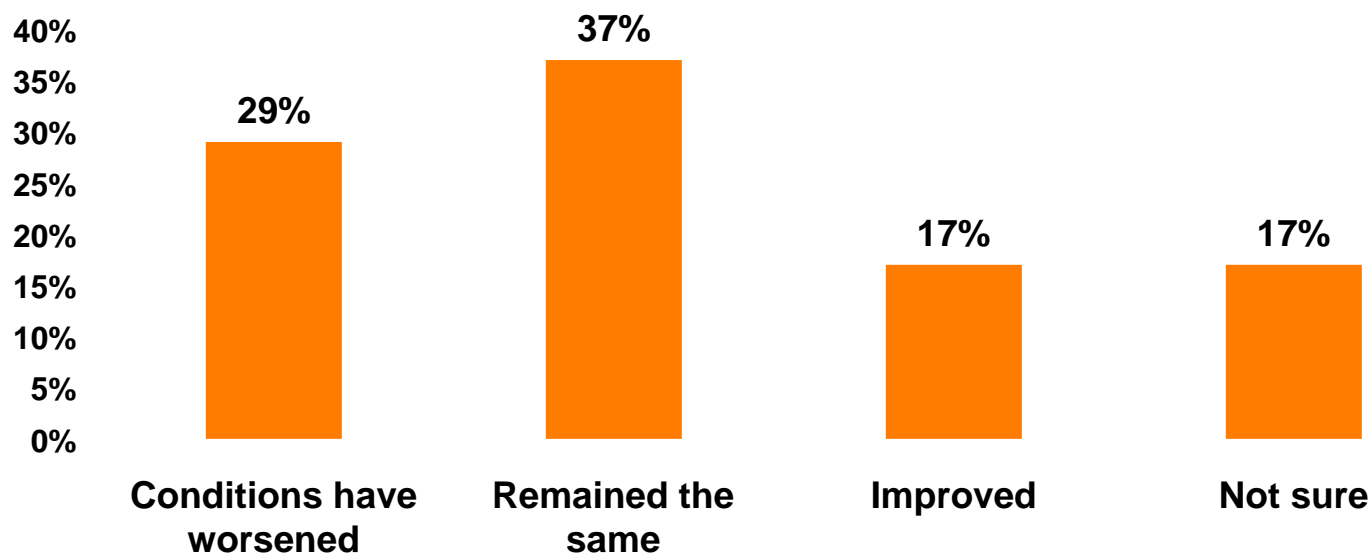
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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%	4%	2%			2%	4%	3%	23%
	Somewhat unimportant	50%	29%	37%	52%	44%	17%	40%	39%	44%	8%
	Somewhat important		41%	44%	30%	50%	54%	43%	42%	38%	31%
	Very important		9%	6%	5%		13%	5%	4%	6%	15%
	Don't know	50%	16%	8%	11%	6%	17%	10%	10%	9%	23%
Total	Count	2	79	198	56	16	24	102	90	116	13

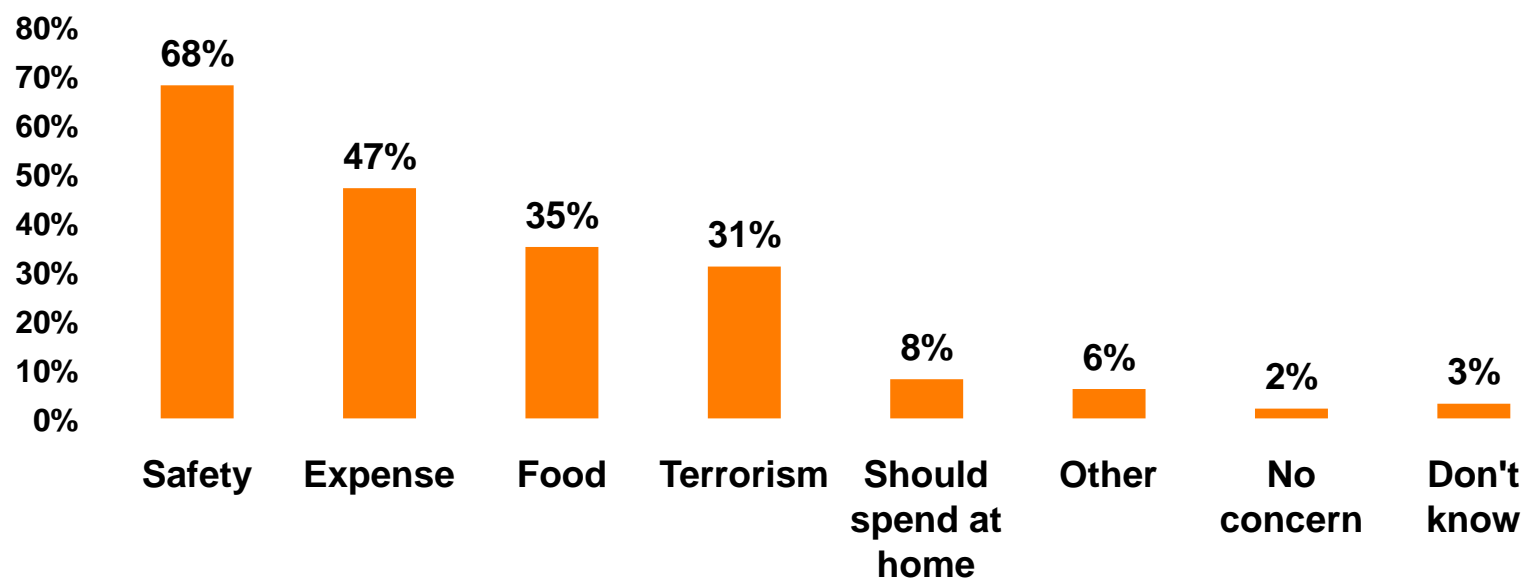
Rating Korean Economy Compared to 12 months ago



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		25%	30%	29%	44%	28%	32%	37%	22%	31%
	Conditions have remained the same	50%	41%	36%	36%	25%	40%	34%	36%	41%	35%
	Conditions have improved		10%	19%	18%	19%	4%	17%	14%	23%	
	Do not know	50%	24%	15%	18%	13%	28%	17%	13%	14%	54%
Total	Count	2	79	199	56	16	25	102	90	116	13

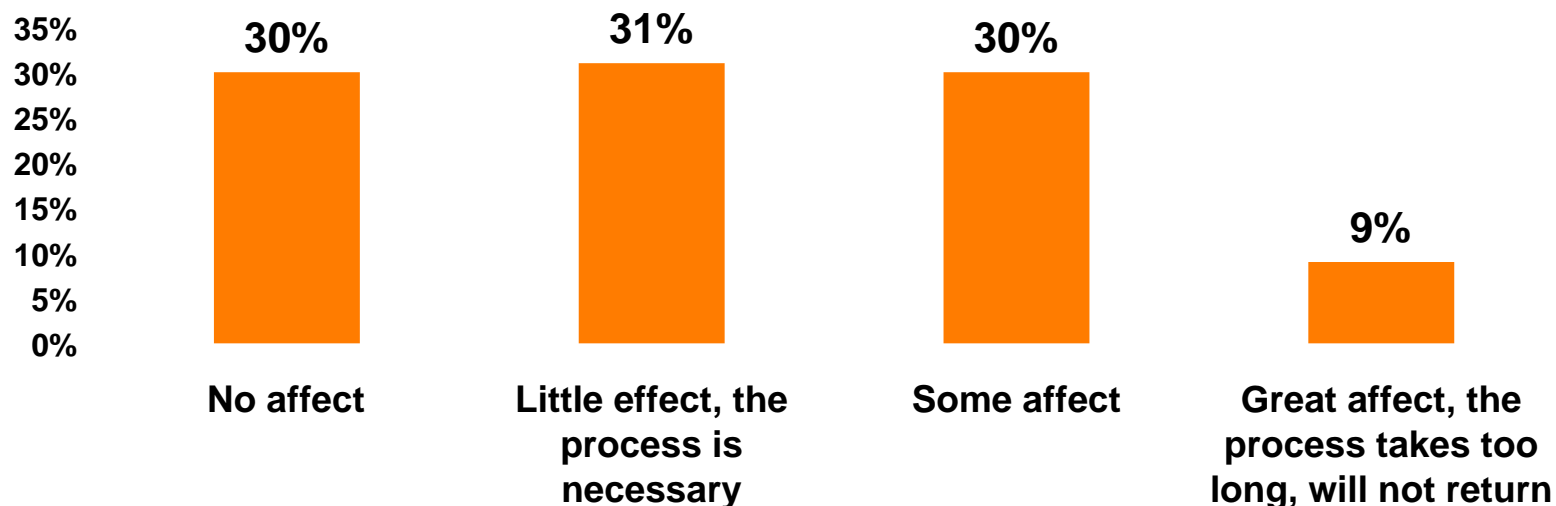
Concerns about travel outside of Korea - Overall



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%	58%	71%	71%	60%	60%	66%	70%	72%	54%
	Expense		49%	47%	48%	27%	52%	46%	47%	47%	46%
	Food		27%	39%	41%	7%	40%	30%	42%	34%	1.5%
	Terrorism		34%	32%	29%	20%	32%	32%	28%	36%	1.5%
	Spending money abroad when it should be spent at home	50%	14%	7%	4%		16%	11%	6%	6%	
	Other		6%	6%	4%	7%	12%	8%	4%	3%	8%
	Do not know	50%	6%	3%	2%		4%	2%	4%	3%	1.5%
	No concerns		3%	2%	4%	7%		3%	1%	3%	
Total	Cases	2	79	199	56	15	25	101	90	116	13

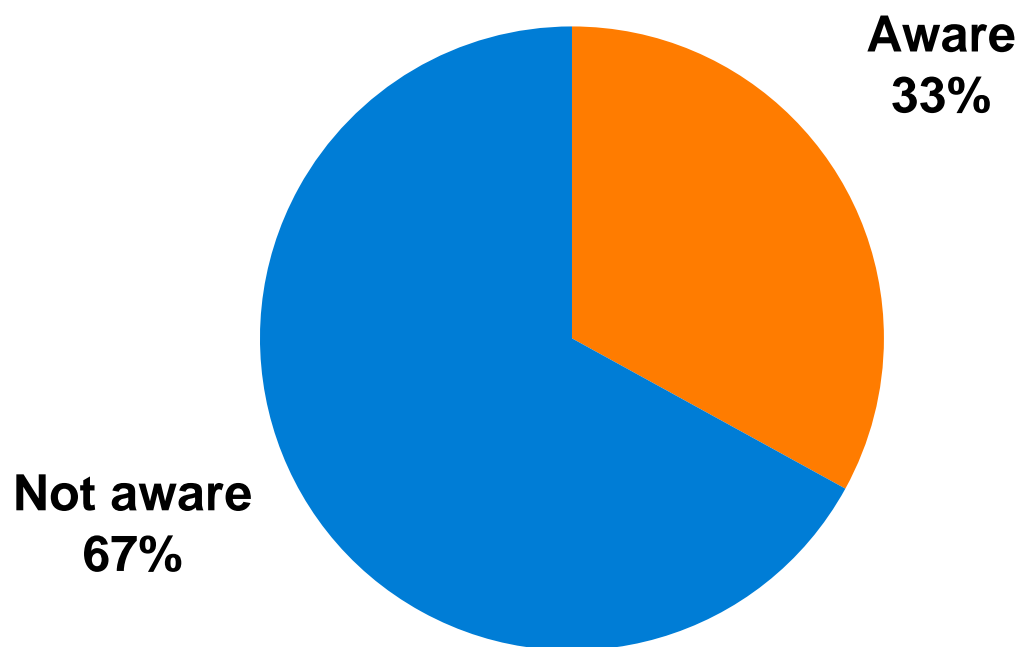
Security Screening/ Immigration Process at Guam International Airport



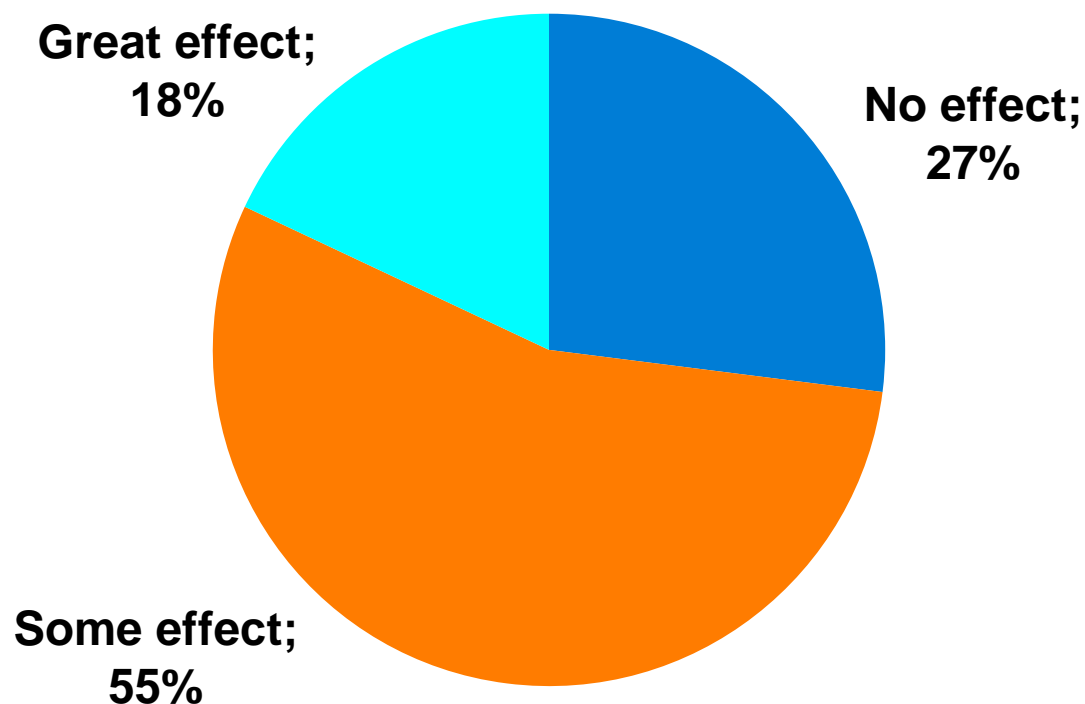
Hotel Room Surcharge by \$3.00/ Per day Per room to help build Guam Museum

- Mean Rating – **3.0** out of possible 7.0
- Agree (Score 6-7) – **13%**
- Neutral (Score 4-5) – **32%**
- 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

