



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

NOVEMBER 2010



Prepared by: QMark Research

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Background & Methodology

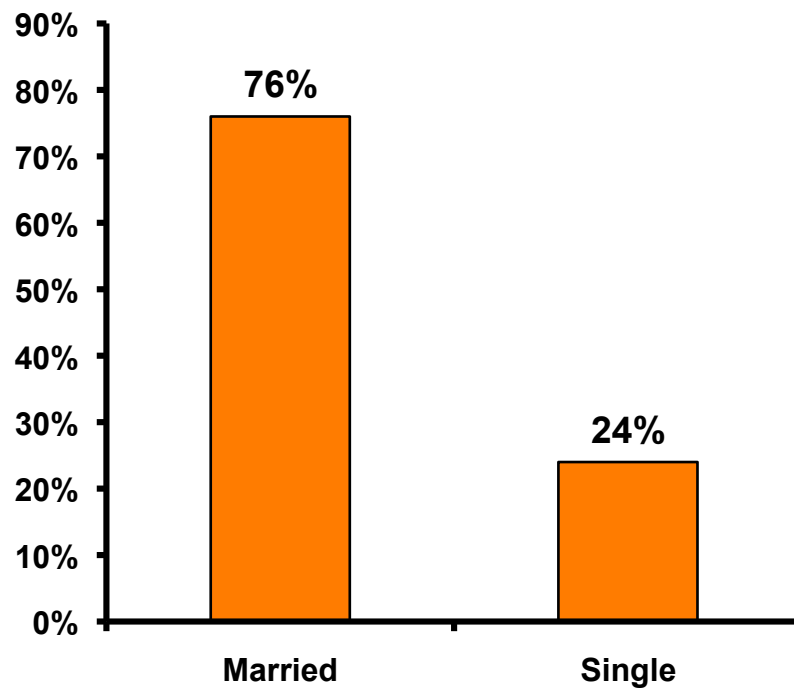
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

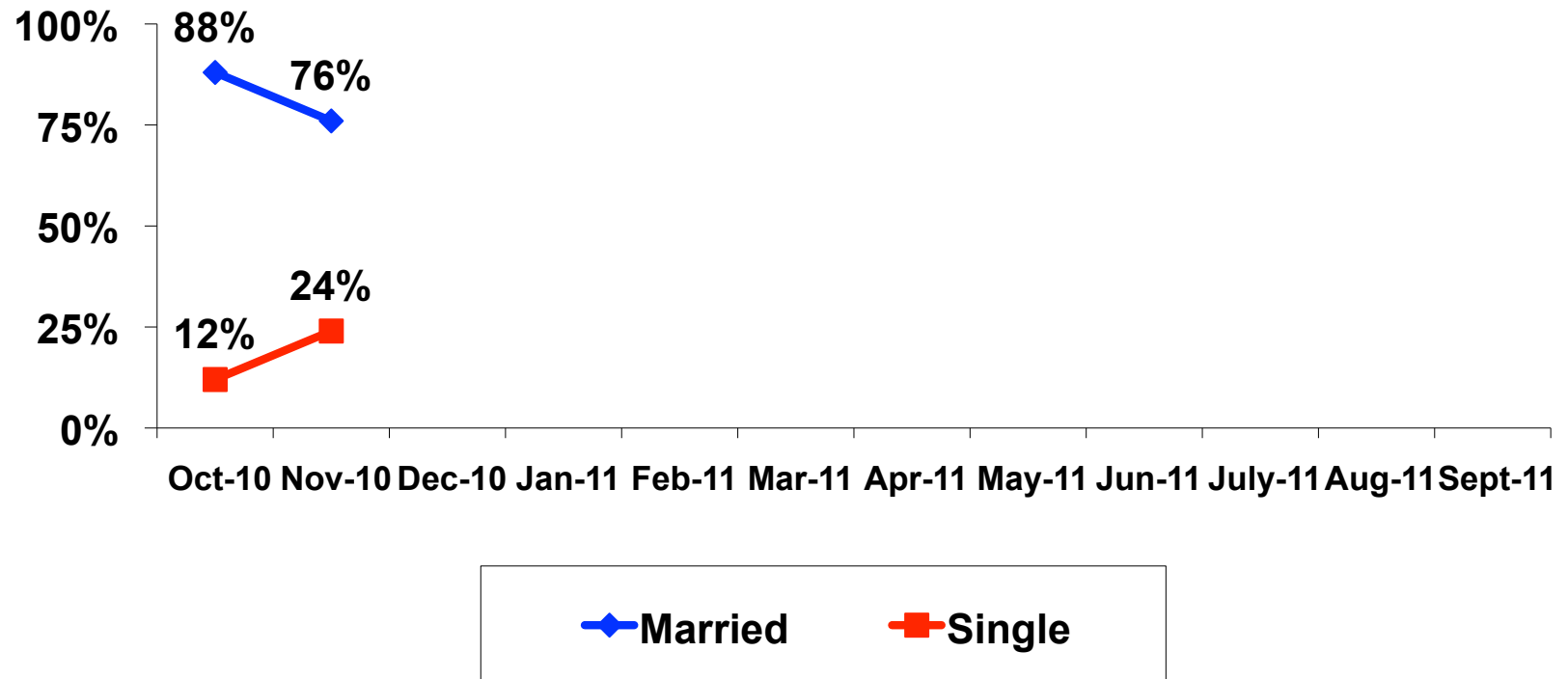
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

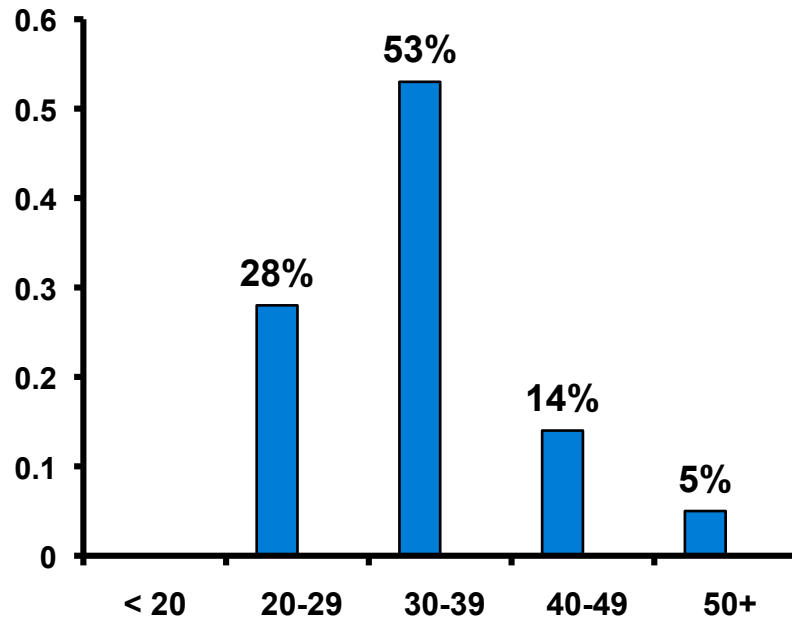


- A majority of visitors are married.

Marital Status



Age - Overall

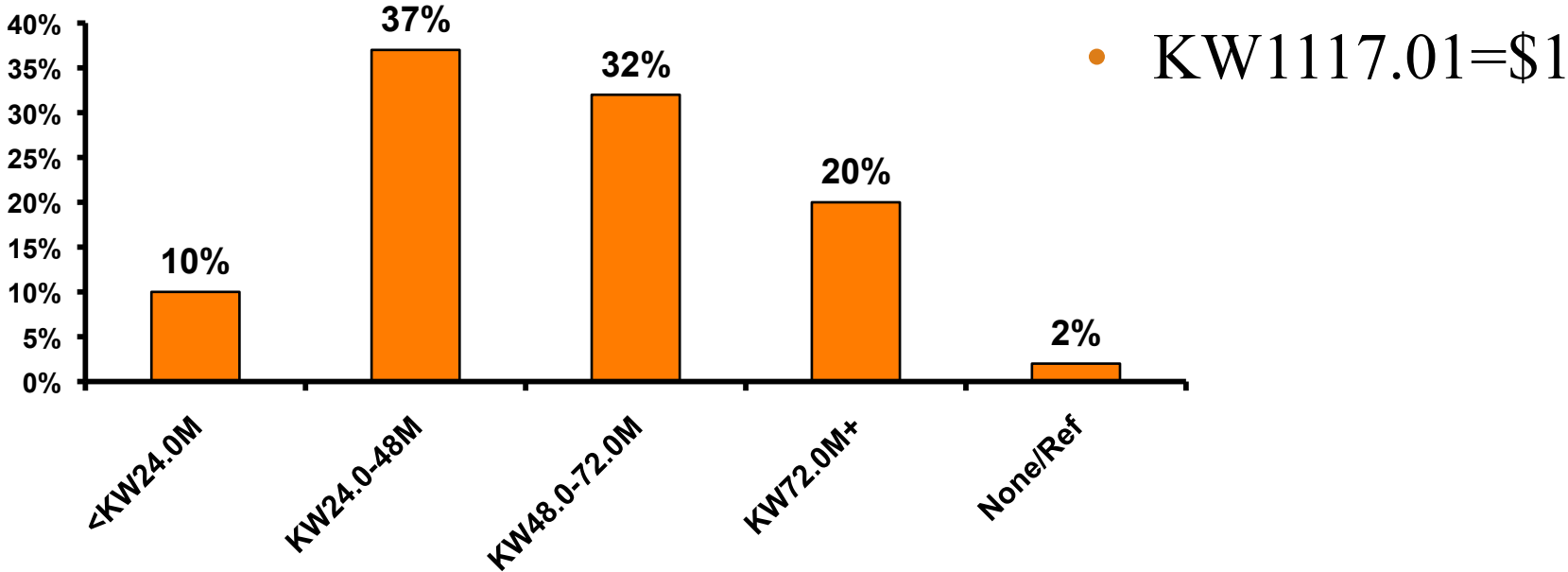


- The average age of the respondents is 34.8 years of age.

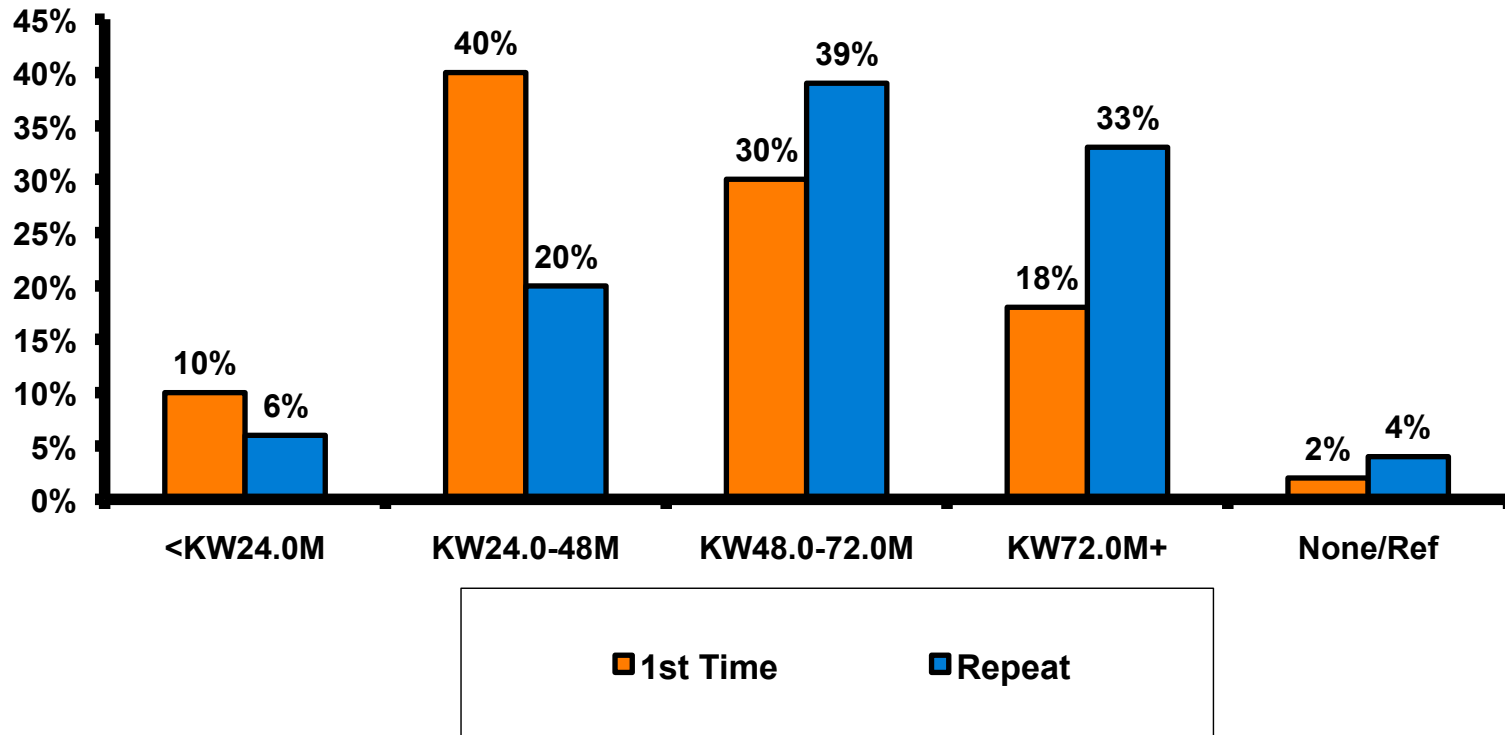
Average Age



Personal Income



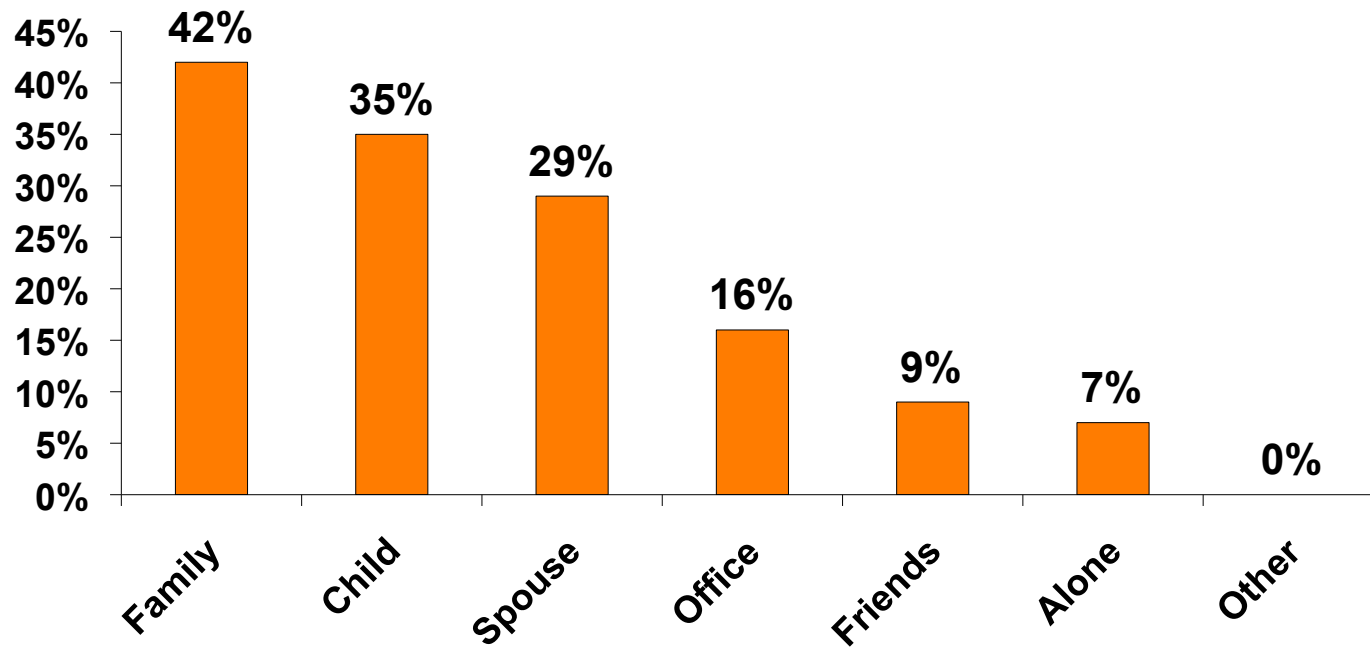
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	32	9	23	15	11	3	3
			9%	5%	13%	16%	6%	6%	17%
	KW24.0M-KW48.0M	Count	126	63	63	45	68	10	3
			37%	37%	37%	48%	37%	20%	17%
	KW48.0M-KW72.0M	Count	108	57	51	15	68	15	10
			31%	33%	30%	16%	37%	31%	56%
	KW72.0M+	Count	70	36	34	13	35	20	2
			20%	21%	20%	14%	19%	41%	11%
	Refused	Count	8	7	1	5	2	1	
			2%	4%	1%	5%	1%	2%	
Total	Count		344	172	172	93	184	49	18

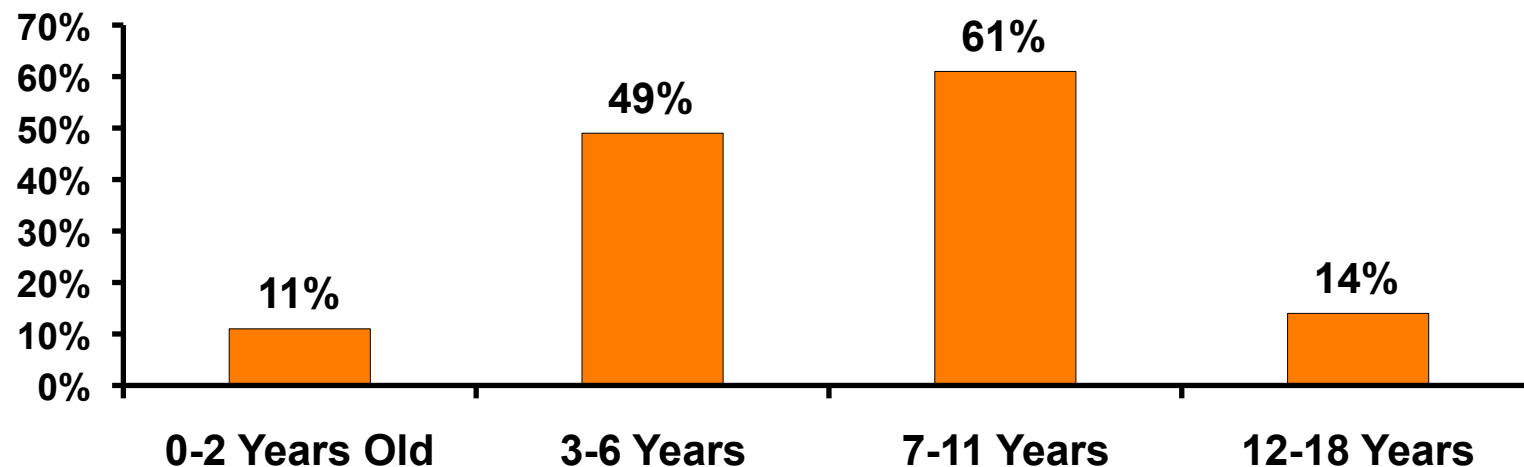
Travel Companions



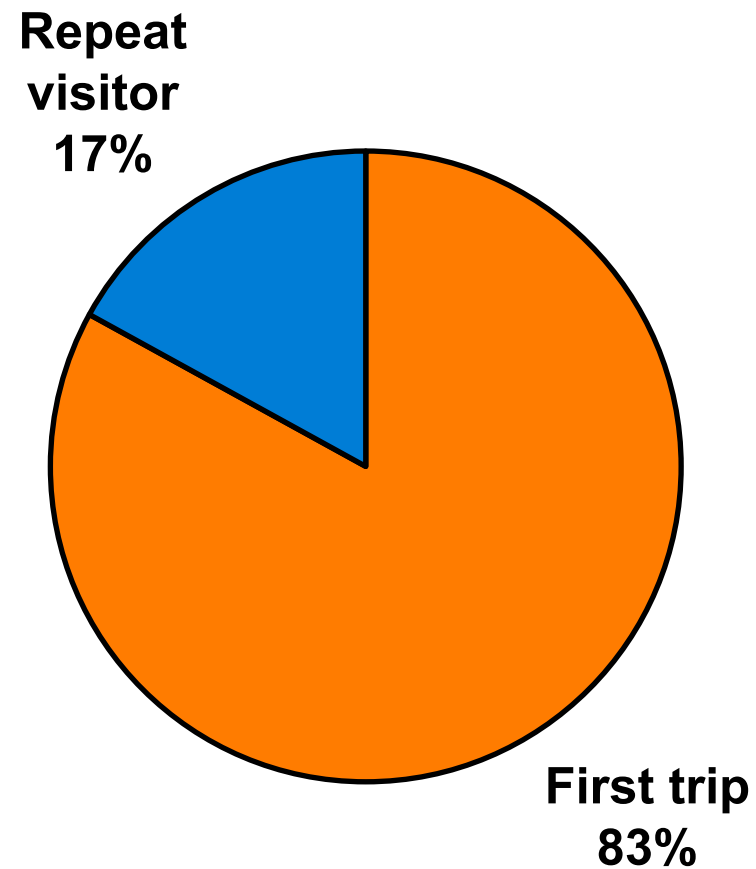
Number of Children Travel Party

N=123 total respondents traveling with children.

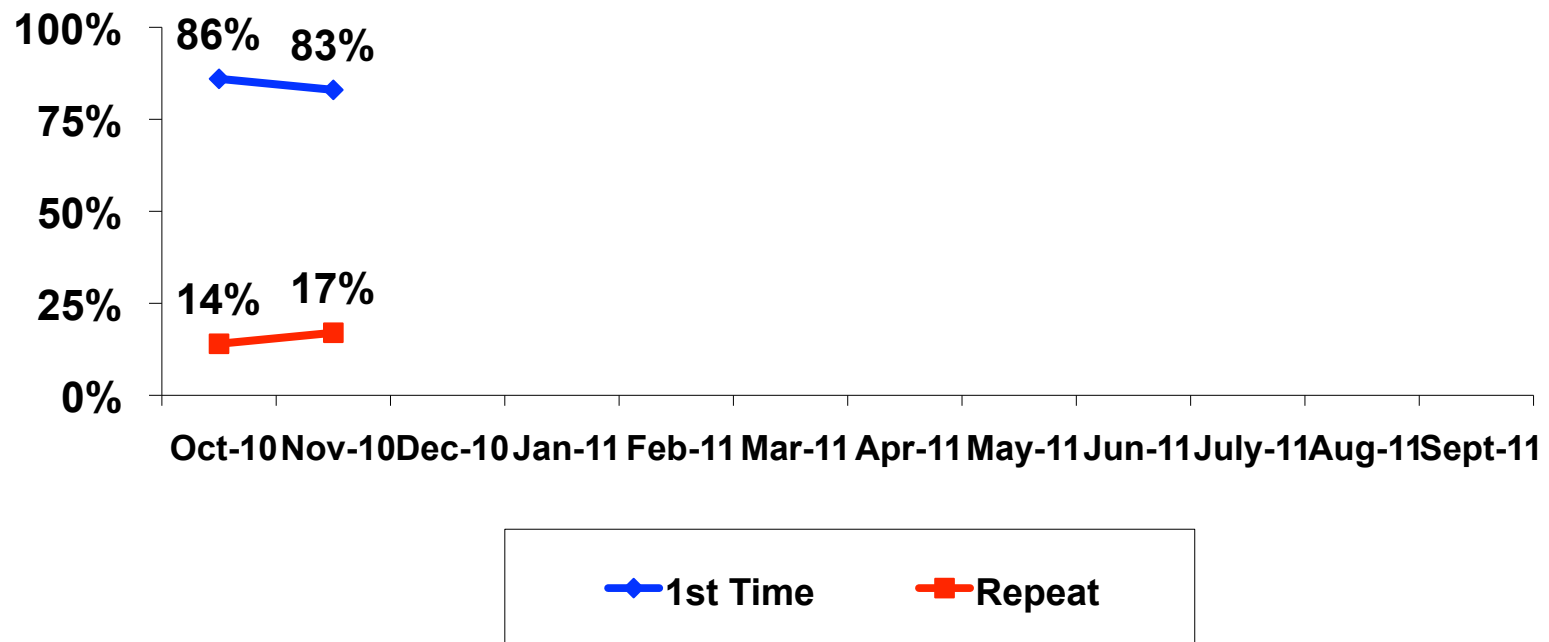
(Of those N=123 respondents, there is a total of 214 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



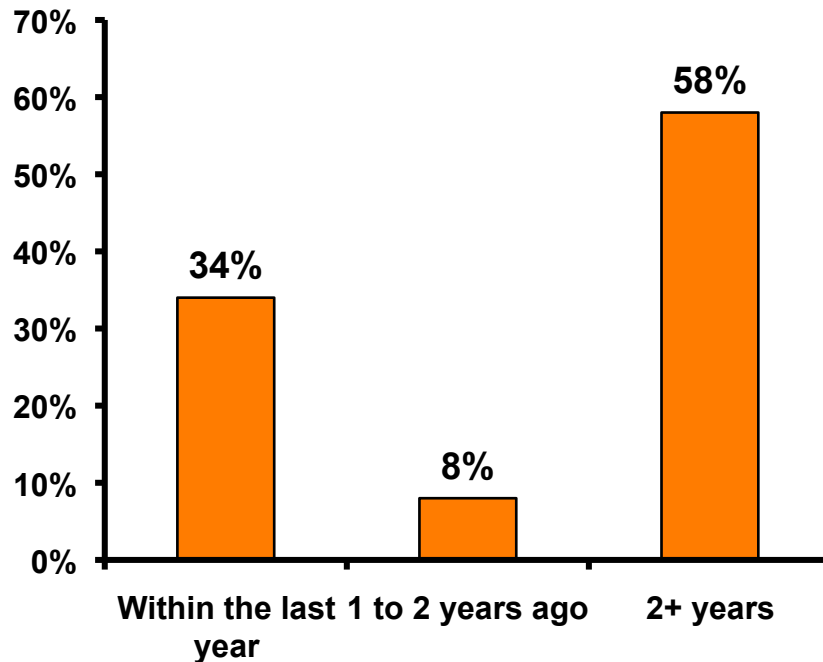
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	175	146	29
			50%	50%	48%
	Female	Count	177	146	31
			50%	50%	52%
Total		Count	352	292	60
AGE	20-29	Count	97	84	13
			28%	29%	22%
	30-39	Count	187	156	31
			53%	53%	52%
	40-49	Count	50	40	10
			14%	14%	17%
	50+	Count	18	12	6
			5%	4%	10%
Total		Count	352	292	60

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

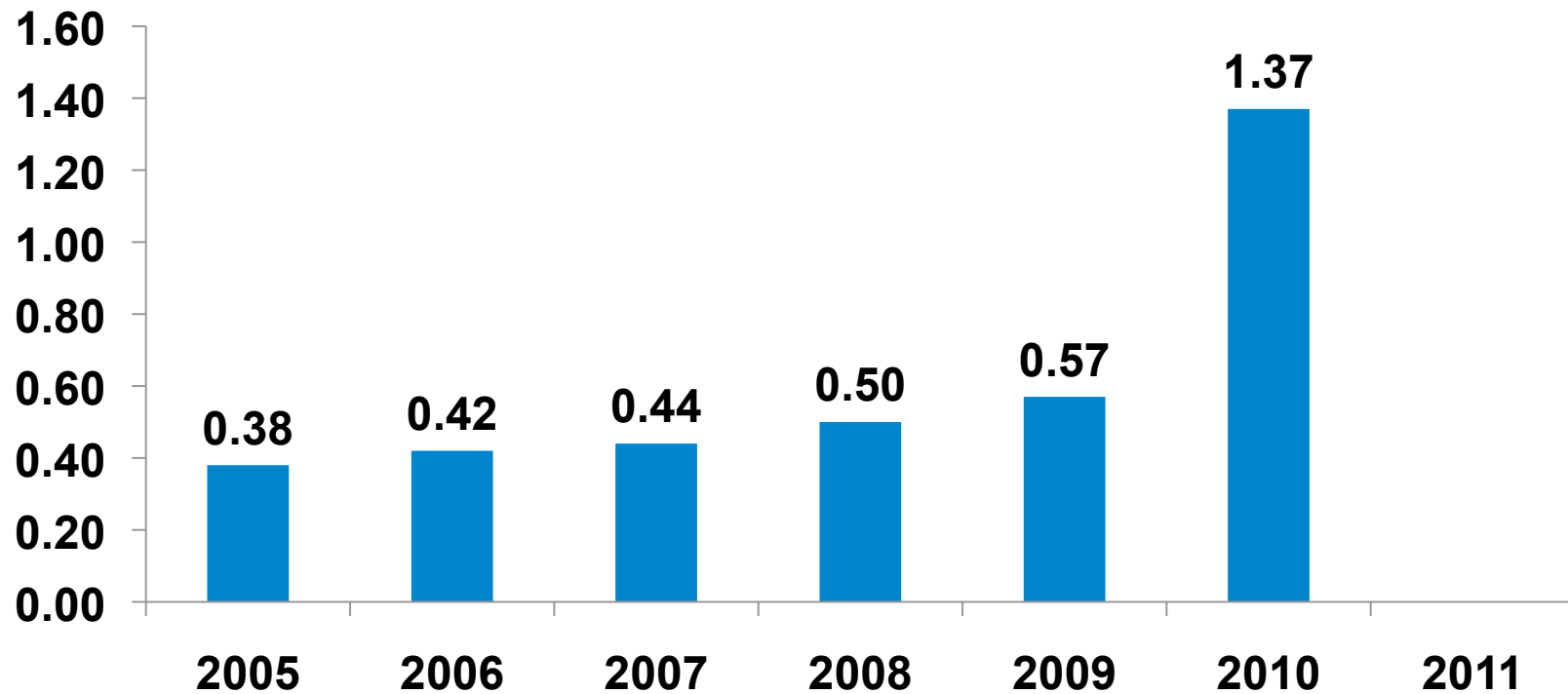
Repeat Visitors Last Trip

n = 59

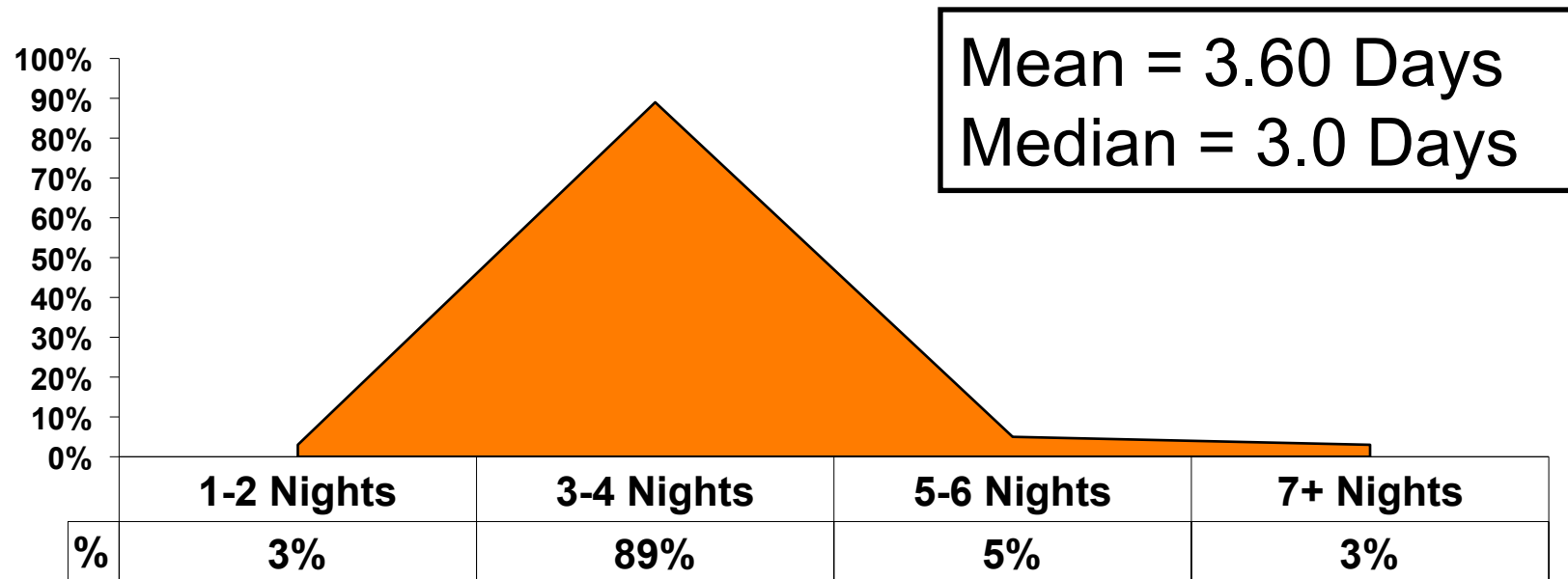


- The average repeat visitor has been to Guam 2.8 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

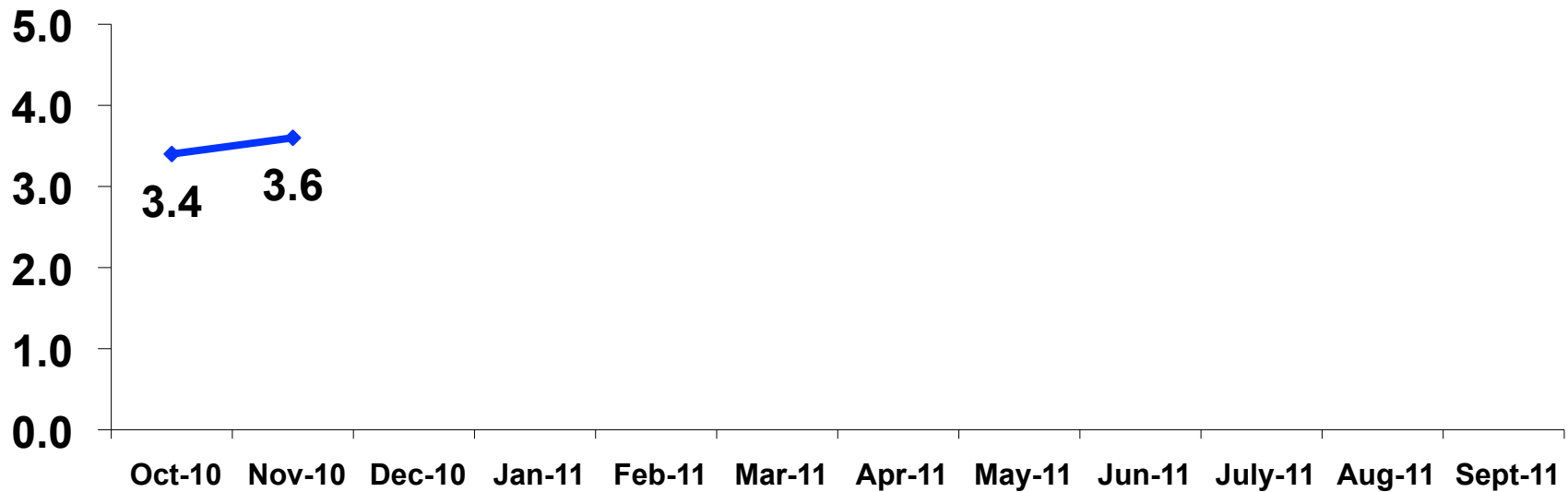
Average Number Overnight Trips (2005-2011) (2 nights or more)



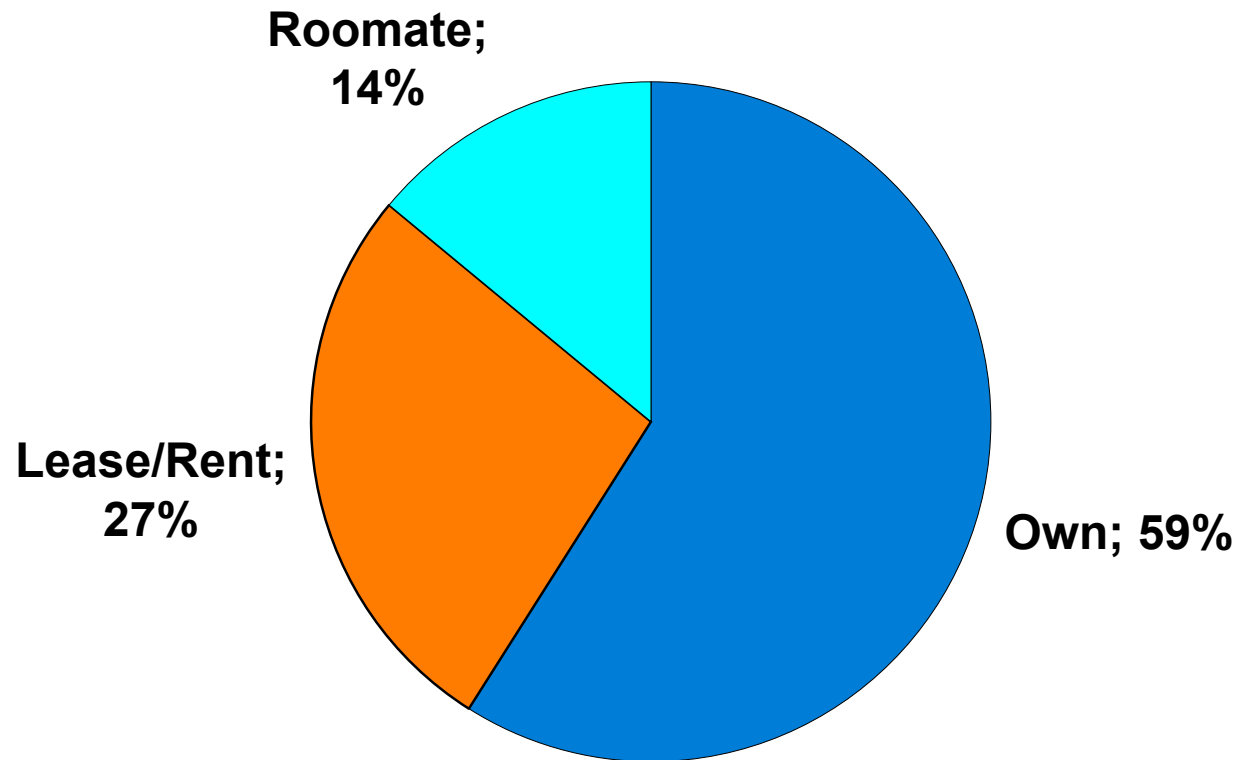
Length of Stay



Average Length of Stay



Living Accommodations

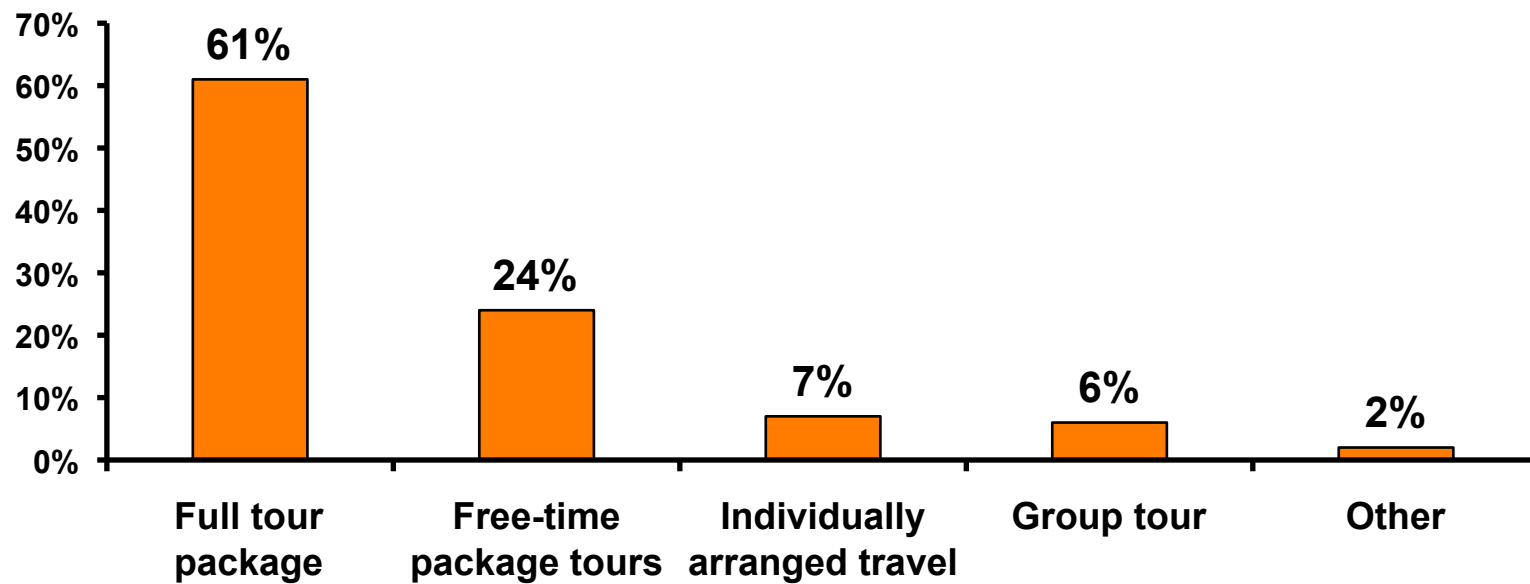


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.29	White Collar-Office	29%	6%	29%	31%	41%	25%
	Homemaker	15%	9%	11%	19%	16%	13%
	Prof/Specialist/Tech	12%	13%	11%	15%	12%	
	Self-employed	11%	6%	10%	14%	12%	
	Manager	7%	9%	6%	5%	10%	
	Service worker	4%	9%	6%	2%	1%	
	Student	4%	9%	2%	2%	3%	25%
	Professor/Teacher	3%	3%	5%	4%		
	Skilled worker	3%		6%	1%		
	Free-lancer	2%	13%	1%	2%	1%	
	Other	2%		3%	3%	1%	
	Sales/Clerical	2%	3%	4%		1%	
	Govt-Mgr	2%	9%		4%		
	Unemployed	2%		3%			25%
	Govt - Office/non-mgr	1%	6%	2%			
	Govt-Exec	1%		2%			
	Retired	1%			1%		13%
	Judicial	0%	3%				
Total	Count	350	32	126	108	68	8

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

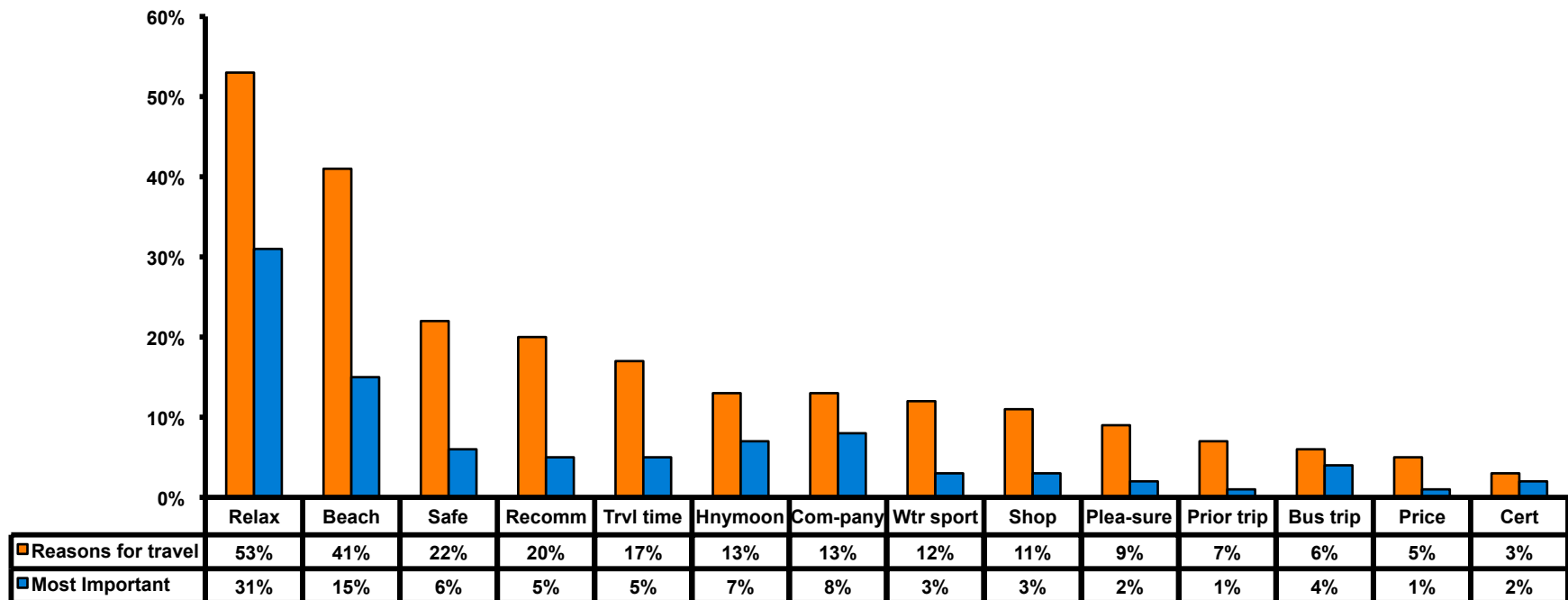


Accommodation by Income

Average length of stay: 3.60 days

	TOTAL	PERSONAL INCOME				Refused
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.9 Pacific Islands Club PIC	62%	47%	60%	65%	71%	63%
Onward Beach Resort	9%	13%	12%	6%	9%	
The Westin Resort Guam	6%	3%	5%	6%	7%	
Hyatt Regency Guam	5%	6%	6%	4%	3%	
Sheraton Laguna Resort	5%	16%	5%	4%		13%
Hilton Guam Resort & Spa	2%		2%	3%	4%	
Leo Palace Resort	2%	3%	1%	5%		
Ramada Suites Guam	1%		2%	1%	1%	13%
Holiday Resort Guam	1%			2%	1%	
Relatives, Friends, Home Stay	1%	3%		1%	1%	
Outrigger Guam Resort	1%	6%	1%			
Guam Reef Hotel	1%		2%	1%		
Japan Plaza Hotel	1%		2%			
Guam Marriott Resort Hotel	1%			2%		
Other	1%		2%			
Fiesta Resort Guam	1%	3%	1%			
Bayview Hotel	0%			1%		
Royal Orchid Guam	0%					13%
Days Inn Tamuning	0%				1%	
Hotel Sane Fe	0%		1%			
Total Count	351	32	126	108	69	8

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
 - Guam's natural beauty/beaches and
 - Company sponsored trip
- are the three reasons mentioned most often as the most important reason for this particular trip.

Motivation by Age & Gender

	TOTAL	AGE				GENDER	
		20-29	30-39	40-49	50+	Male	Female
Q.5 Just to relax	53%	47%	55%	62%	44%	48%	59%
Beautiful seas, beaches, tropical climate	41%	33%	42%	52%	39%	41%	41%
It is a safe place to spend a vacation	22%	9%	27%	26%	28%	26%	18%
Recommendation of friend, relative, travel agency	20%	16%	20%	22%	22%	17%	22%
Short travel time	17%	18%	20%	10%	11%	16%	19%
Honeymoon	13%	21%	14%			15%	12%
My company sponsored me	13%	16%	12%	6%	22%	15%	11%
Water sports	12%	15%	12%	4%	11%	9%	15%
Shopping	11%	15%	9%	12%	6%	8%	14%
Pleasure	9%	11%	9%	4%	22%	10%	8%
A previous visit	7%	2%	9%	6%	17%	6%	7%
Company or Business trip	6%	5%	5%	8%	17%	9%	3%
Price of the tour package	5%	4%	5%	8%		5%	5%
Other	5%	6%	5%	2%		4%	5%
Career certification or testing	3%	6%	2%		6%	3%	3%
To visit friends or relatives	2%	3%	1%	4%	6%	2%	2%
SCUBA diving	2%	5%	1%	4%		1%	3%
Special promotion	2%	2%	3%			1%	3%
Promotional materials from GVB	1%		2%		6%	2%	1%
Organized Sporting Activity	1%		2%		11%	1%	2%
To golf	1%	1%			17%	2%	1%
Convention, Conference, Trade show	1%			2%	11%	2%	
To get married or Attend wedding	1%		1%			1%	1%
Total Cases	352	97	187	50	18	175	177

Motivation by Income

	TOTAL	PERSONAL INCOME					Refused
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+		
Q.5 Just to relax	53%	47%	57%	55%	53%	25%	
Beautiful seas, beaches, tropical climate	41%	28%	44%	41%	40%	25%	
It is a safe place to spend a vacation	22%	22%	17%	25%	29%	13%	
Recommendation of friend, relative, travel agency	20%	38%	18%	14%	26%	13%	
Short travel time	17%	9%	12%	23%	20%		
Honeymoon	13%	25%	21%	6%	4%	25%	
My company sponsored me	13%	16%	14%	15%	10%		
Water sports	12%	6%	12%	13%	10%	38%	
Shopping	11%	19%	11%	6%	13%	25%	
Pleasure	9%	6%	6%	14%	10%	13%	
A previous visit	7%	3%	3%	10%	10%		
Company or Business trip	6%	3%	6%	7%	6%		
Price of the tour package	5%	9%	2%	5%	4%	13%	
Other	5%	9%	5%	2%	6%	13%	
Career certification or testing	3%	3%	1%	3%	6%	13%	
SCUBA diving	2%		4%	1%	1%	13%	
Special promotion	2%		2%	3%	3%		
To visit friends or relatives	2%	6%	2%	1%	1%		
Promotional materials from GVB	1%		2%	2%			
Organized Sporting Activity	1%	6%		1%	1%		
To golf	1%			2%	1%	13%	
Convention, Conference, Trade show	1%		1%	1%	1%		
To get married or Attend wedding	1%		2%				
Total Cases	352	32	126	108	70	8	

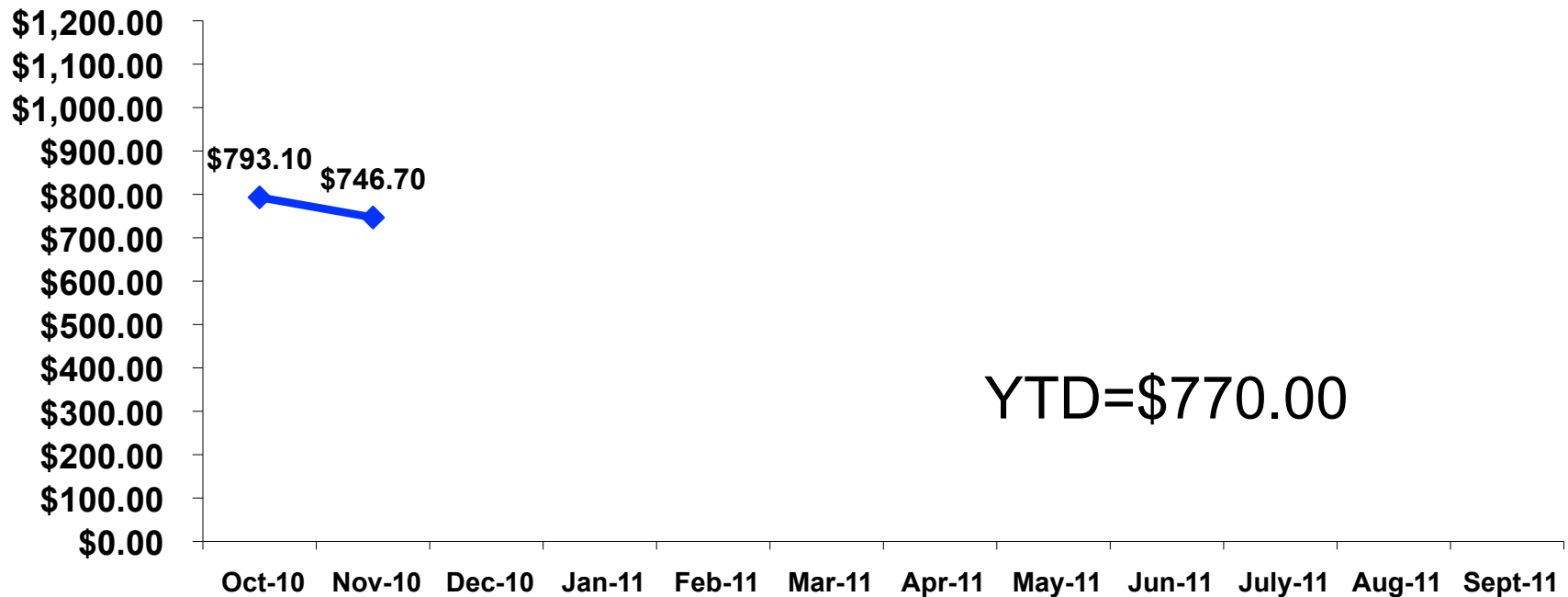
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1117.01/US\$1

- \$1,820.10 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$14,1444 = maximum (highest amount recorded for the entire sample)
- \$746.70 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

KW1117.10=\$1

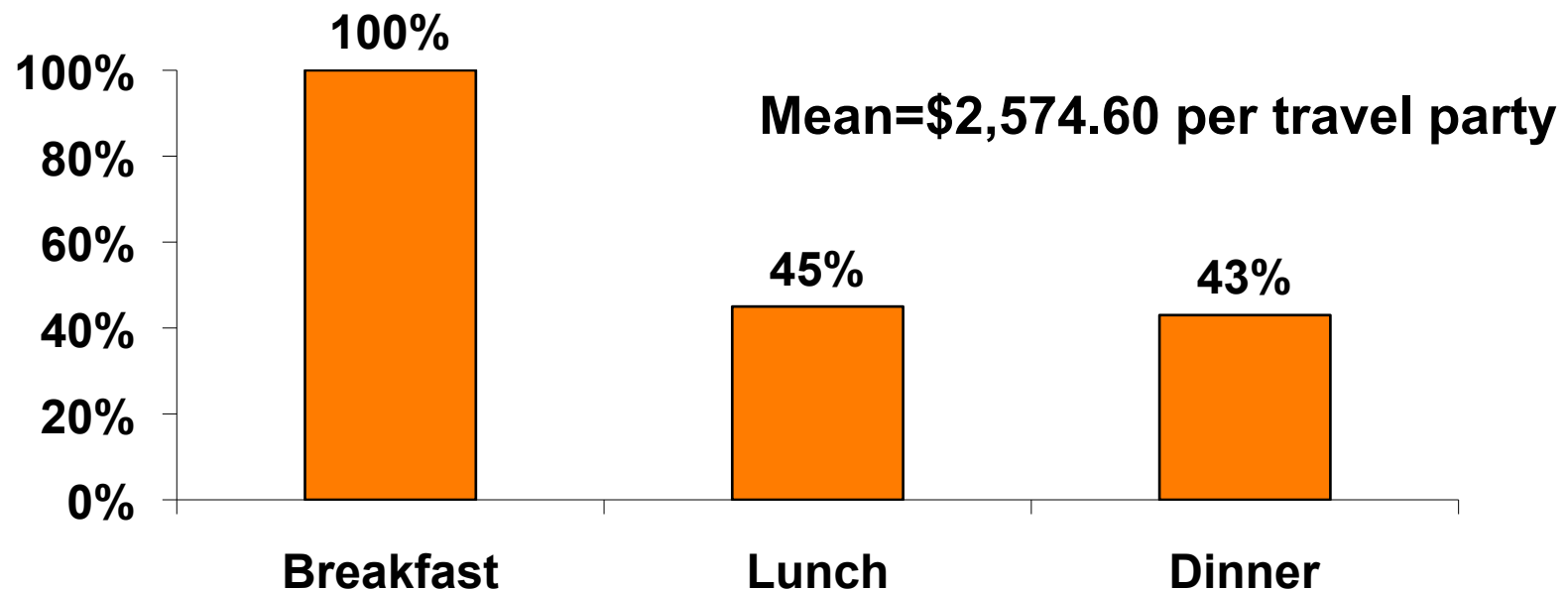
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,559.70
Air & Accommodation w/ daily meal package	\$2,574.60
Air only	\$810.80
Accommodation only	\$1,005.40
Accommodation w/ daily meal only	\$1,010.00
Food & Beverages in Hotel	\$90.60
Ground transportation- Korea	\$79.10
Ground transportation- Guam	\$95.30
Optional tours/ activities	\$355.10
Other expenses	\$407.70
Total Prepaid	\$1,820.10

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

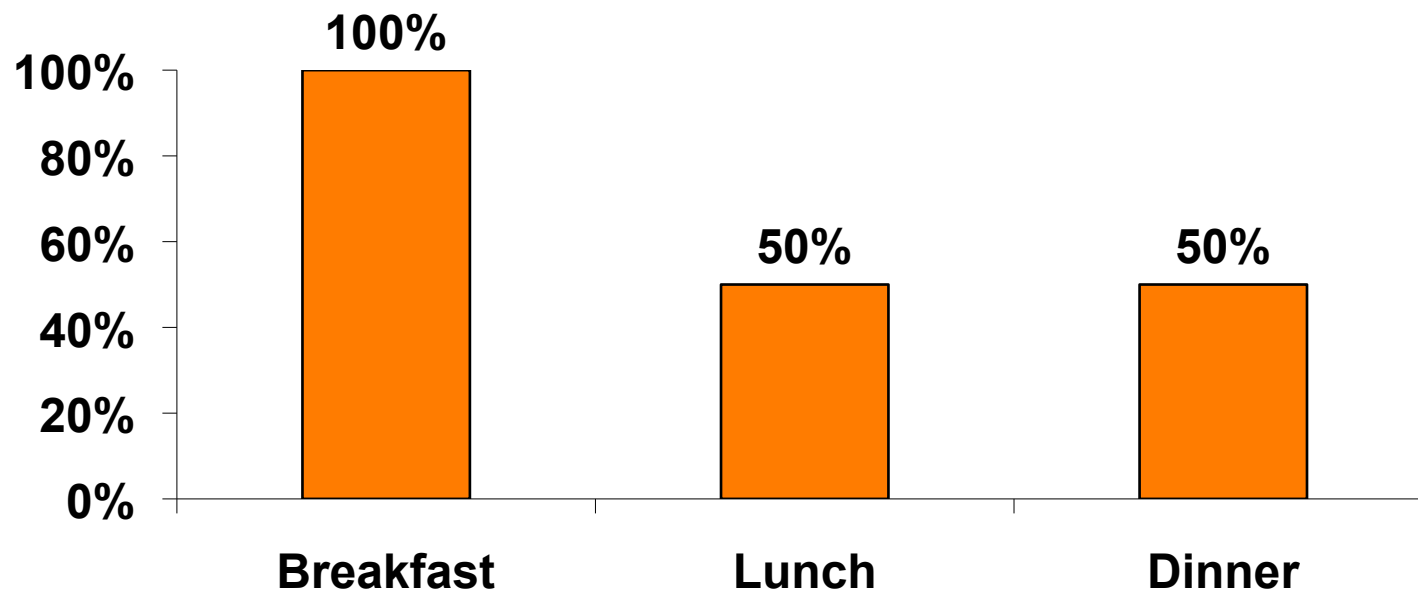
n=164



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

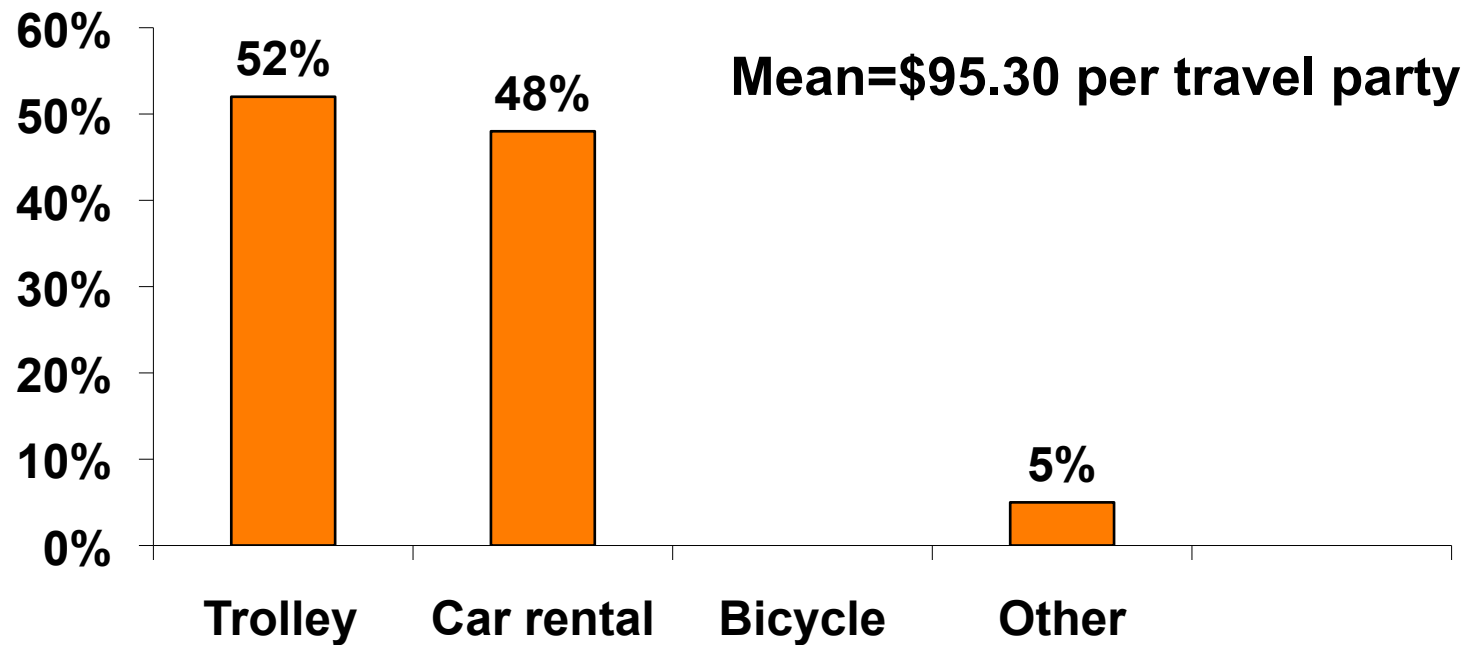
n=8



Mean= \$1,010.00 per travel party

Prepaid Ground Transportation

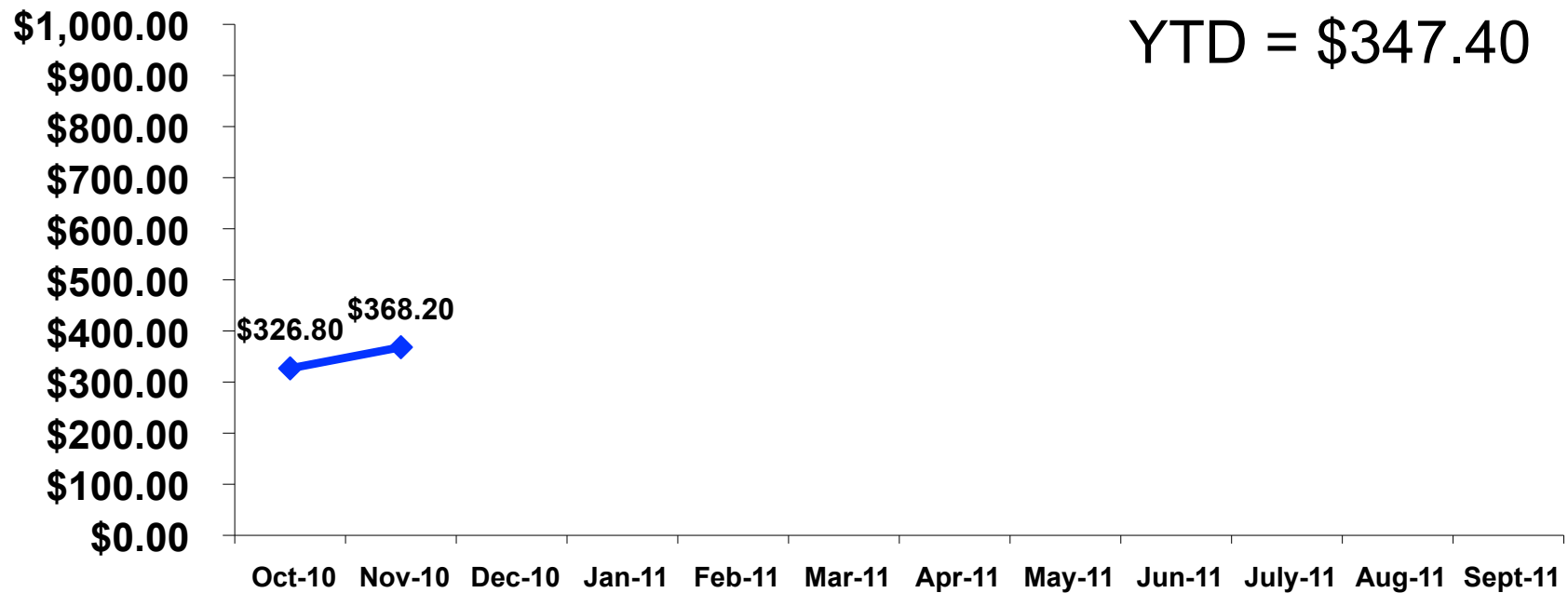
n=21



On-Island Expenditures

- \$761.60 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,000 = Maximum (highest amount recorded for the entire sample)
- \$368.20 = overall mean average per person on-island expenditure

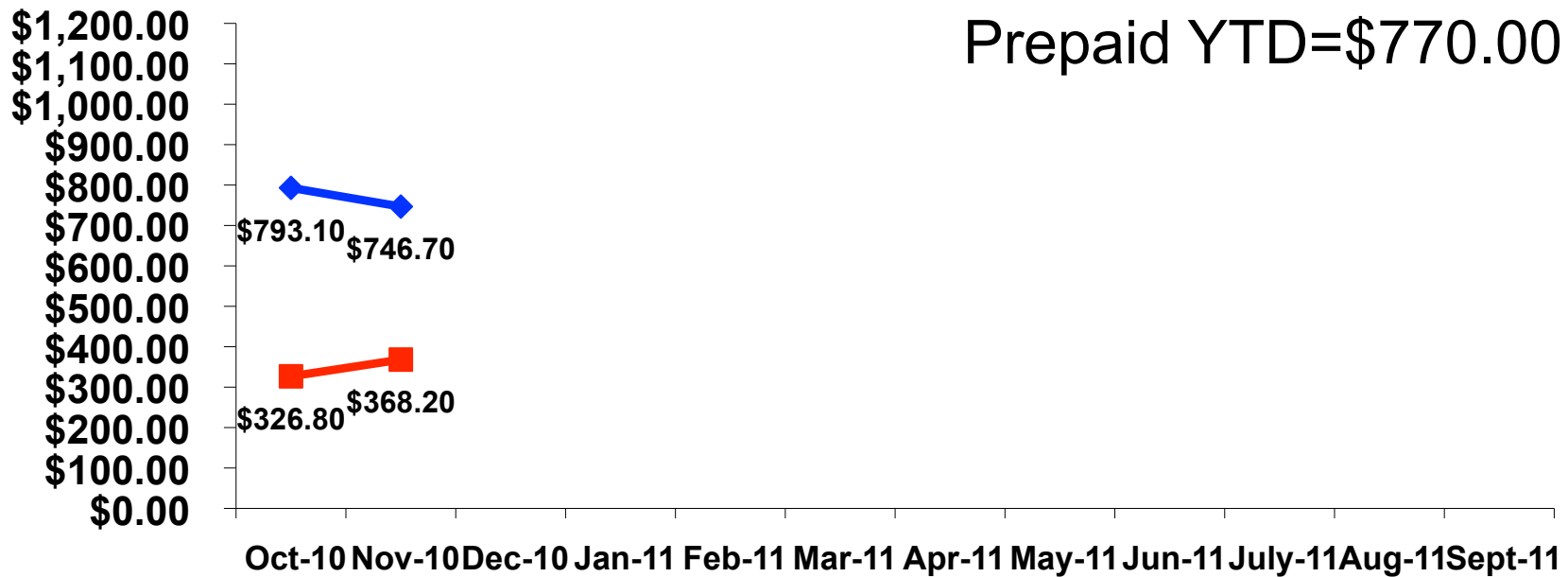
On-Island Expenditures



Prepaid & On-Island Expenditures

On-Isle YTD = \$347.40

Prepaid YTD = \$770.00



◆ Prepaid ■ On-isle

Total On-Island Expenditure by Gender & Age

		GENDER		GENDER								
		TOTAL	Male	Female	Male				Female			
					AGE				AGE			
					20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$761.62	\$793.19	\$730.40	\$754.51	\$810.75	\$770.42	\$806.38	\$737.77	\$688.88	\$776.04	\$1,134.00
	Median	\$527	\$600	\$500	\$420	\$650	\$640	\$700	\$529	\$500	\$525	\$1,010

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$41.51	\$56.45	\$26.75	\$28.23	\$41.05	\$80.36	\$10.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF	Mean	\$23.36	\$25.11	\$21.63	\$28.94	\$22.25	\$20.72	\$12.22
REST/CONV	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE	Mean	\$32.20	\$37.27	\$27.19	\$29.74	\$37.57	\$25.50	\$8.33
HOTEL/ REST	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL	Mean	\$115.27	\$115.95	\$114.60	\$110.64	\$120.80	\$109.28	\$99.56
TOUR	Median	\$0	\$0	\$60	\$78	\$0	\$0	\$0
GIFT/	Mean	\$150.29	\$166.13	\$134.54	\$179.18	\$147.47	\$101.84	\$158.33
SOUV-SELF	Median	\$0	\$0	\$0	\$15	\$0	\$0	\$75
GIFT/SOUV-	Mean	\$131.31	\$127.66	\$134.96	\$122.42	\$139.34	\$131.53	\$95.61
F&F AT HOME	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$20.17	\$21.83	\$18.52	\$19.94	\$20.68	\$17.00	\$25.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$251.12	\$242.89	\$259.26	\$226.86	\$230.61	\$289.52	\$488.33
	Median	\$25	\$10	\$30	\$4	\$30	\$40	\$35
TOTAL ON	Mean	\$761.62	\$793.19	\$730.40	\$743.81	\$754.71	\$773.12	\$897.39
ISLAND	Median	\$527	\$600	\$500	\$500	\$506	\$565	\$700

On-Island Expenditures

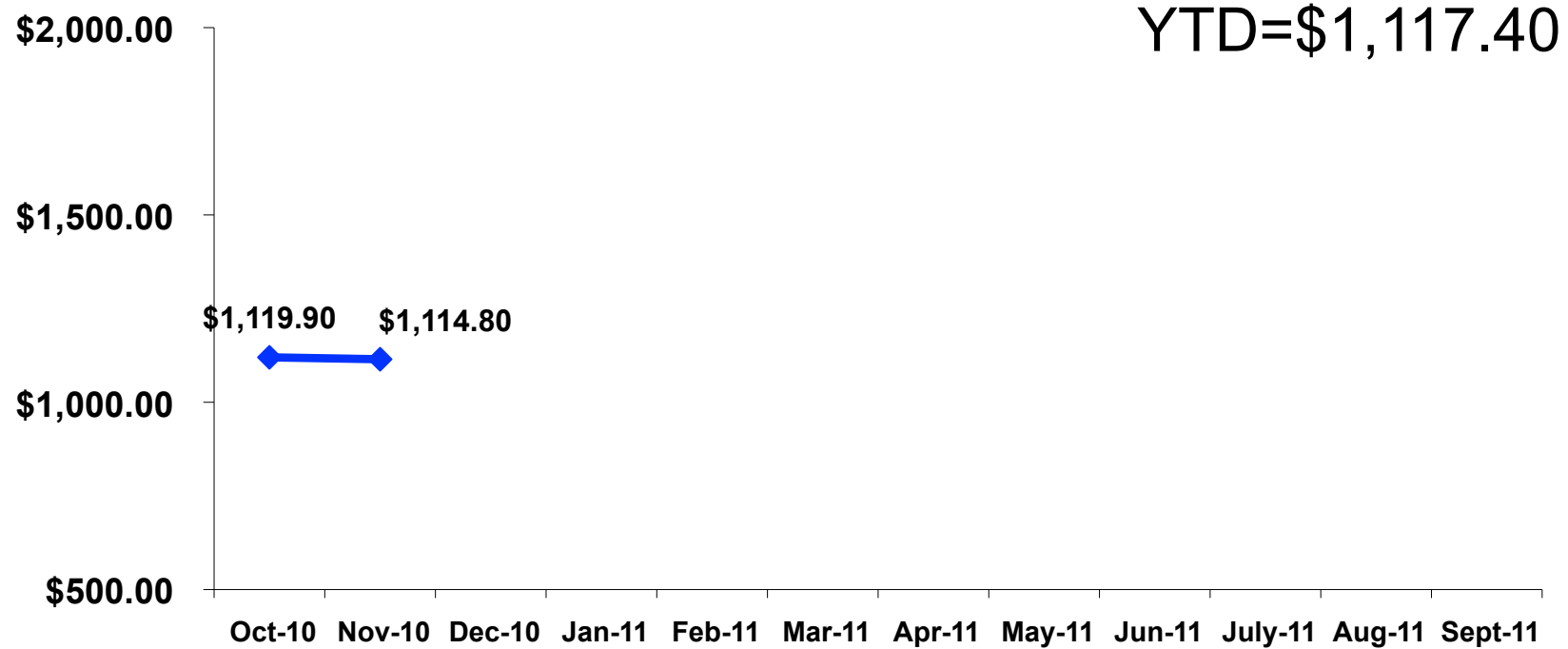
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$44.32	\$27.85
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$24.22	\$19.18
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$33.39	\$26.42
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$117.57	\$104.18
	Median	\$25	\$0
GIFT/ SOUV-SELF	Mean	\$149.48	\$154.20
	Median	\$0	\$0
GIFT/SOUV- F&F AT HOME	Mean	\$136.33	\$106.58
	Median	\$0	\$0
LOCAL TRANS	Mean	\$18.14	\$30.02
	Median	\$0	\$0
OTHER EXP	Mean	\$251.70	\$248.30
	Median	\$10	\$50
TOTAL ON ISLAND	Mean	\$771.27	\$714.62
	Median	\$538	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,114.80 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,423 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

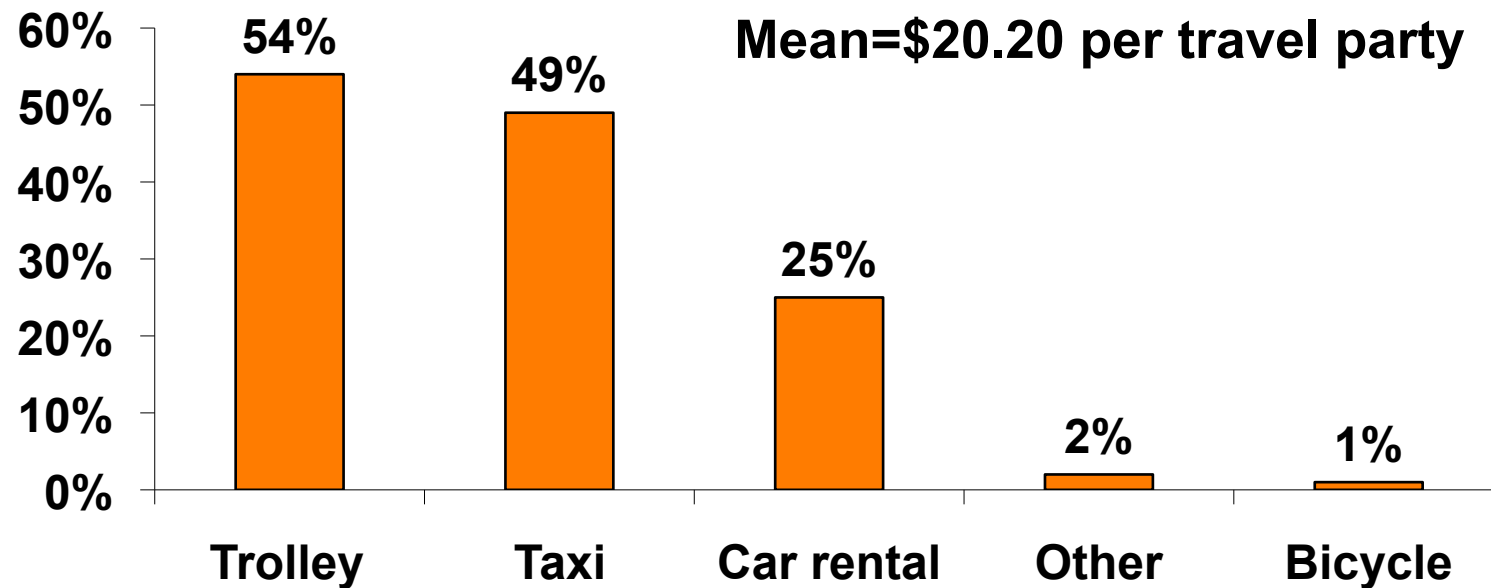


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$41.50
Food & beverage in fast food restaurant/ convenience store	\$23.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$32.20
Optional tours and activities	\$115.30
Gifts/ souvenirs for yourself/companions	\$150.30
Gifts/ souvenirs for friends/family at home	\$131.30
Local transportation	\$20.20
Other expenses not covered	\$251.10
Average Total	\$761.60

Local Transportation

n=109



Guam Airport Expenditures

- \$55.80 = 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

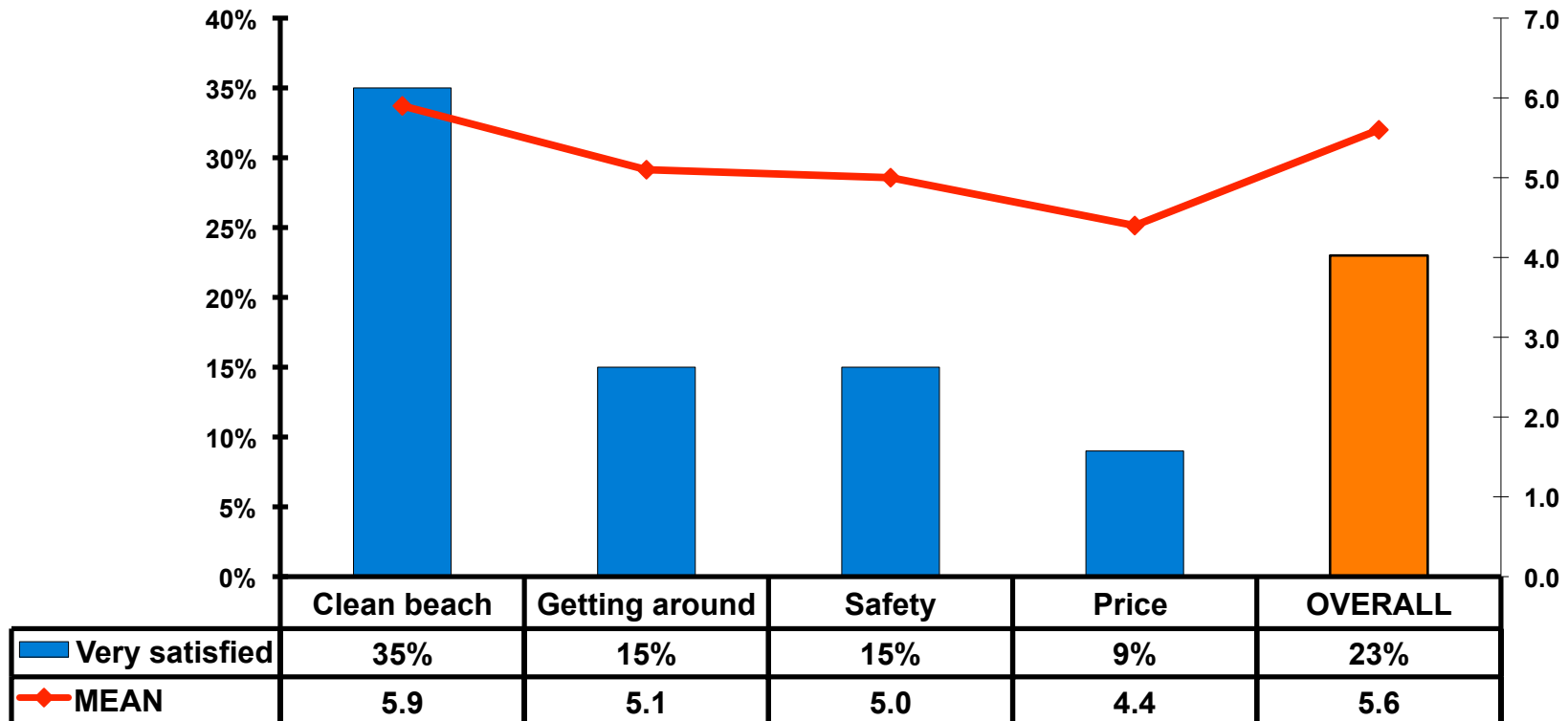
	MEAN \$
Food & Beverages	\$4.00
Gifts/Souvenirs Self	\$27.30
Gifts/Souvenirs Others	\$23.70
Total	\$55.80

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

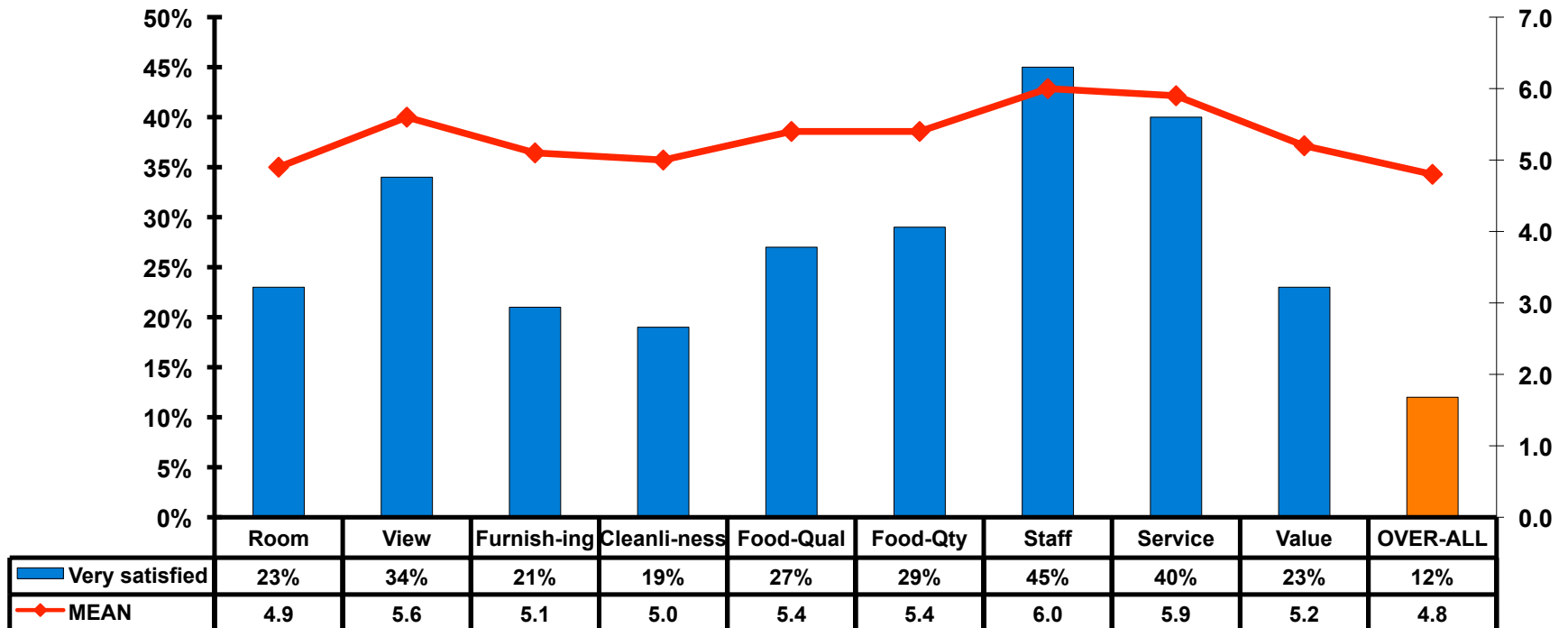
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

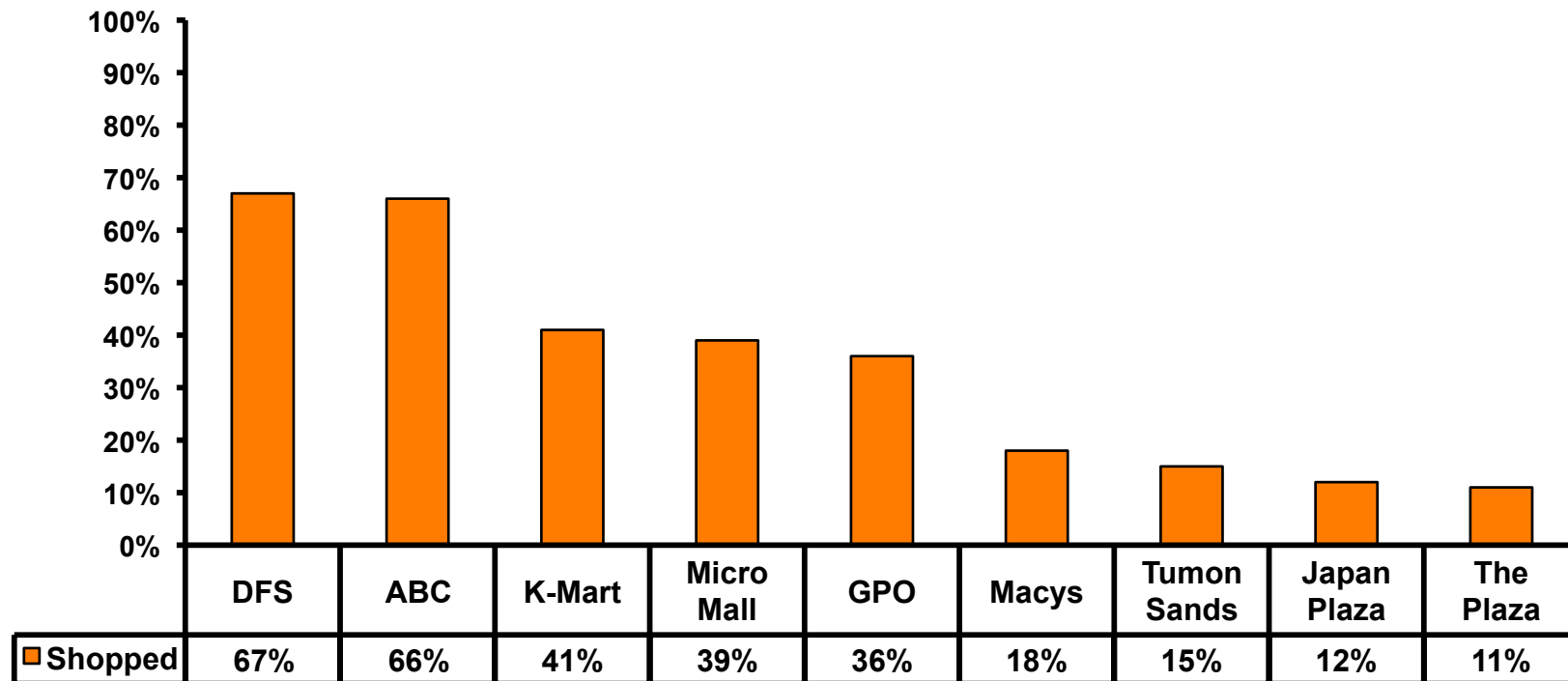
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

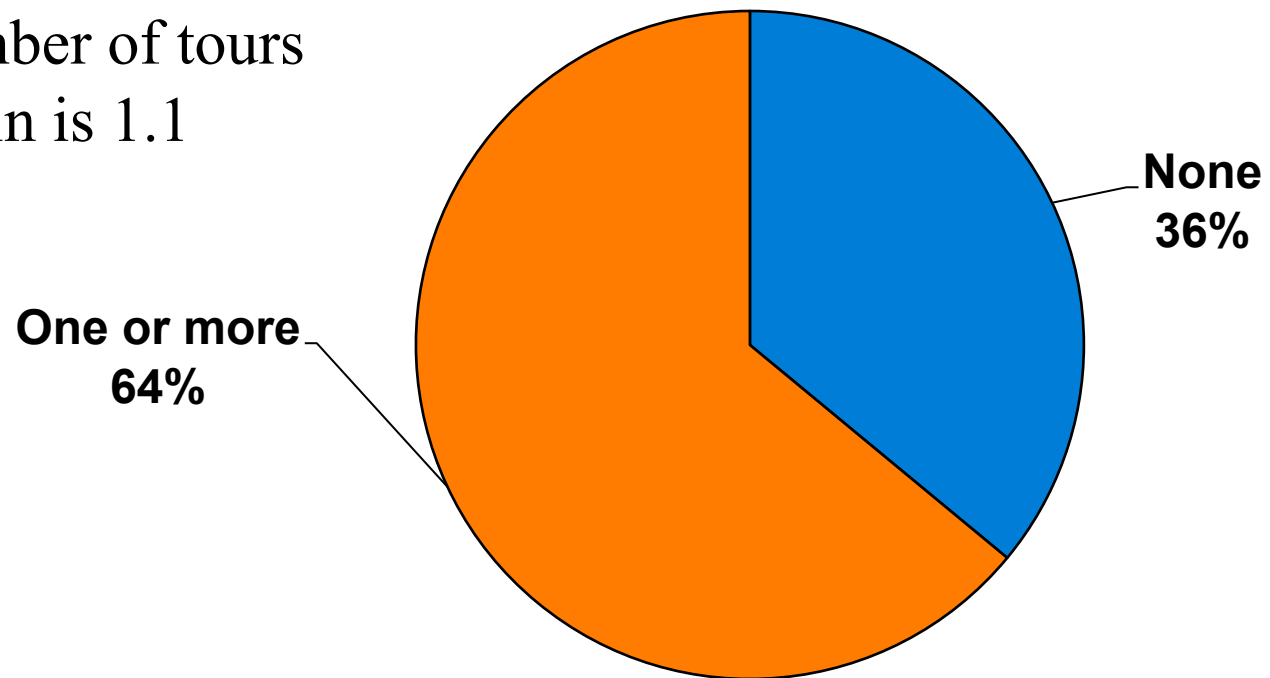
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 47%	Score of 6 to 7 = 42%
Score of 4 to 5 = 45%	Score of 4 to 5 = 45%
Score 1 to 3 = 8%	Score 1 to 3 = 13%
MEAN = 5.2	MEAN = 5.0

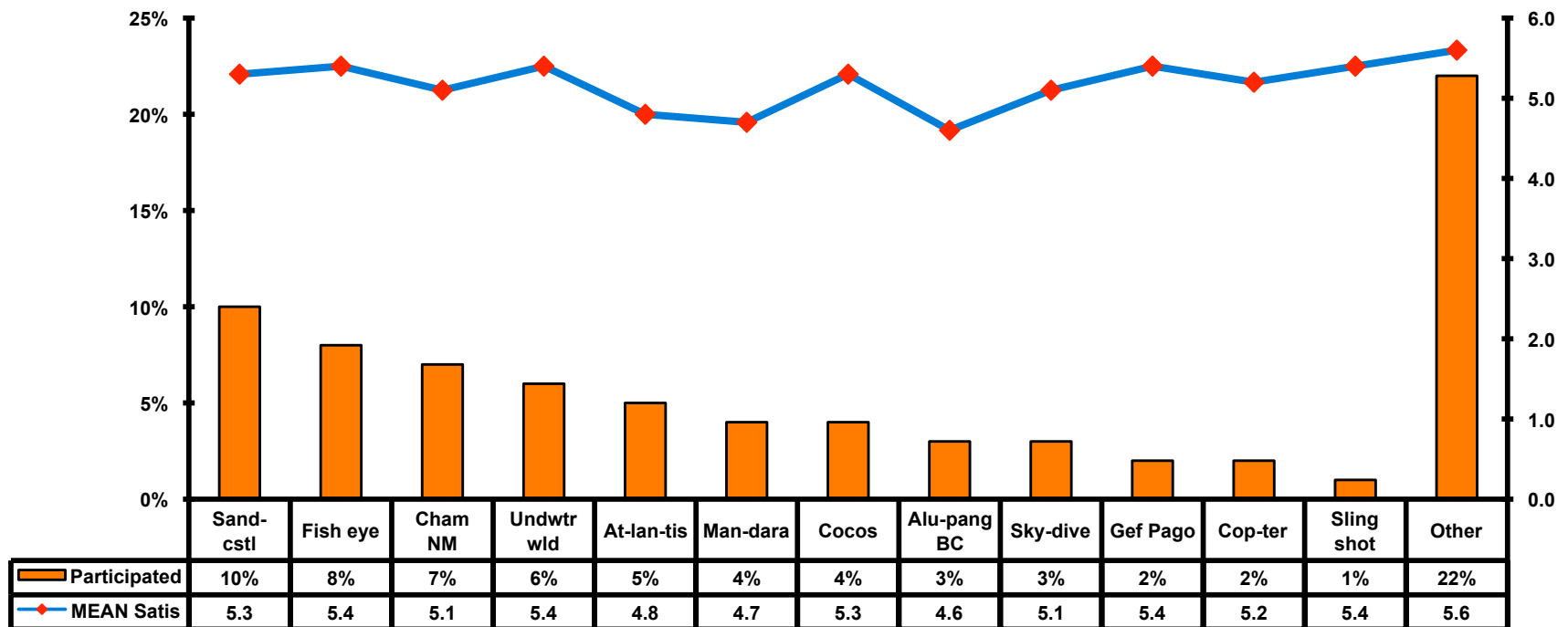
Optional Tour Participation

- Average number of tours participated in is 1.1



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 = 43%	Score of 6 to 7 = 37%
Score of 4 to 5 = 50%	Score of 4 to 5 = 52%
Score 1 to 3 = 7%	Score 1 to 3 = 10%
MEAN = 5.1	MEAN = 4.9

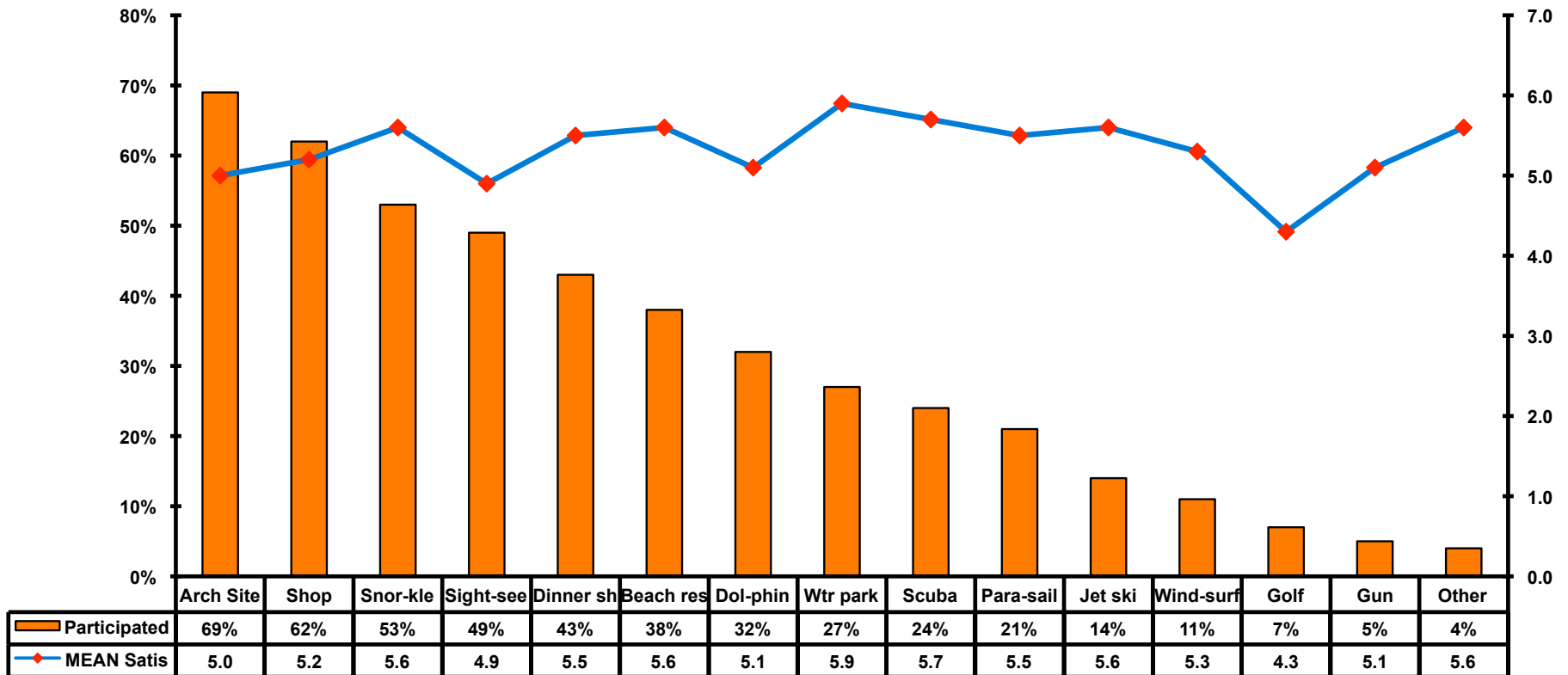
Night Tours Satisfaction

7pt Rating Scale

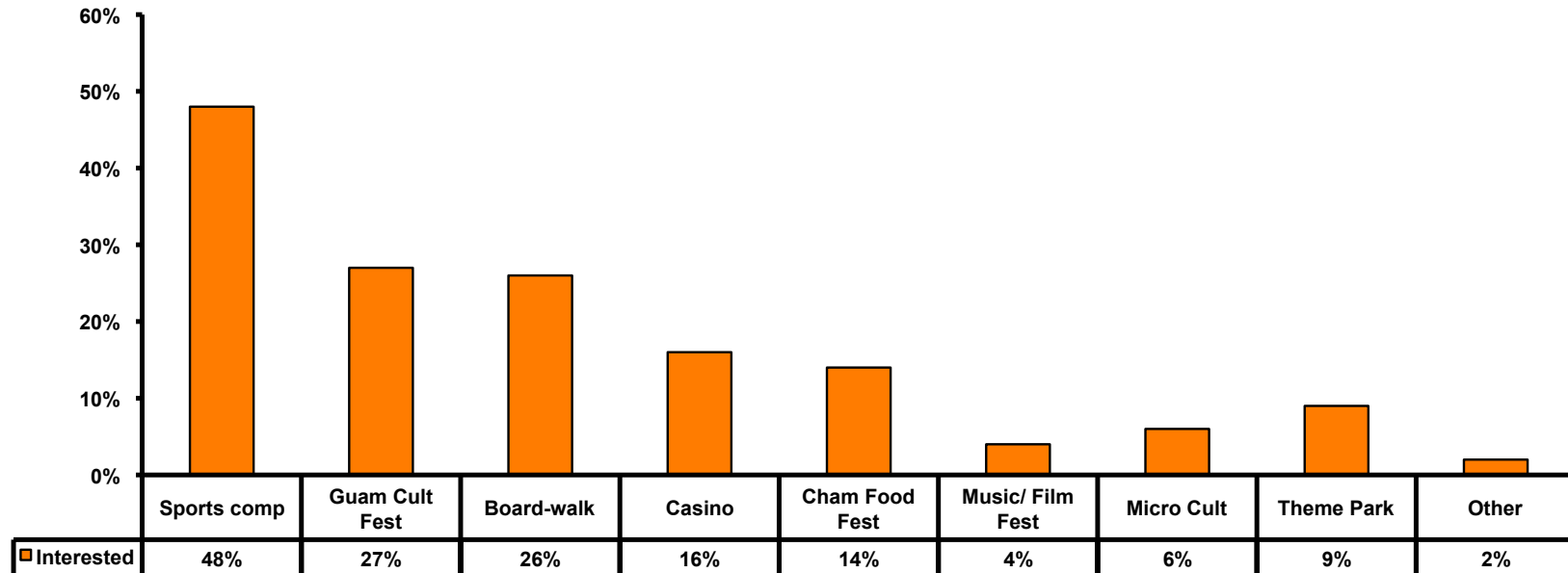
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 27%	Score of 6 to 7 = 24%
Score of 4 to 5 = 59%	Score of 4 to 5 = 58%
Score 1 to 3 = 14%	Score 1 to 3 = 18%
MEAN = 4.6	MEAN = 4.5

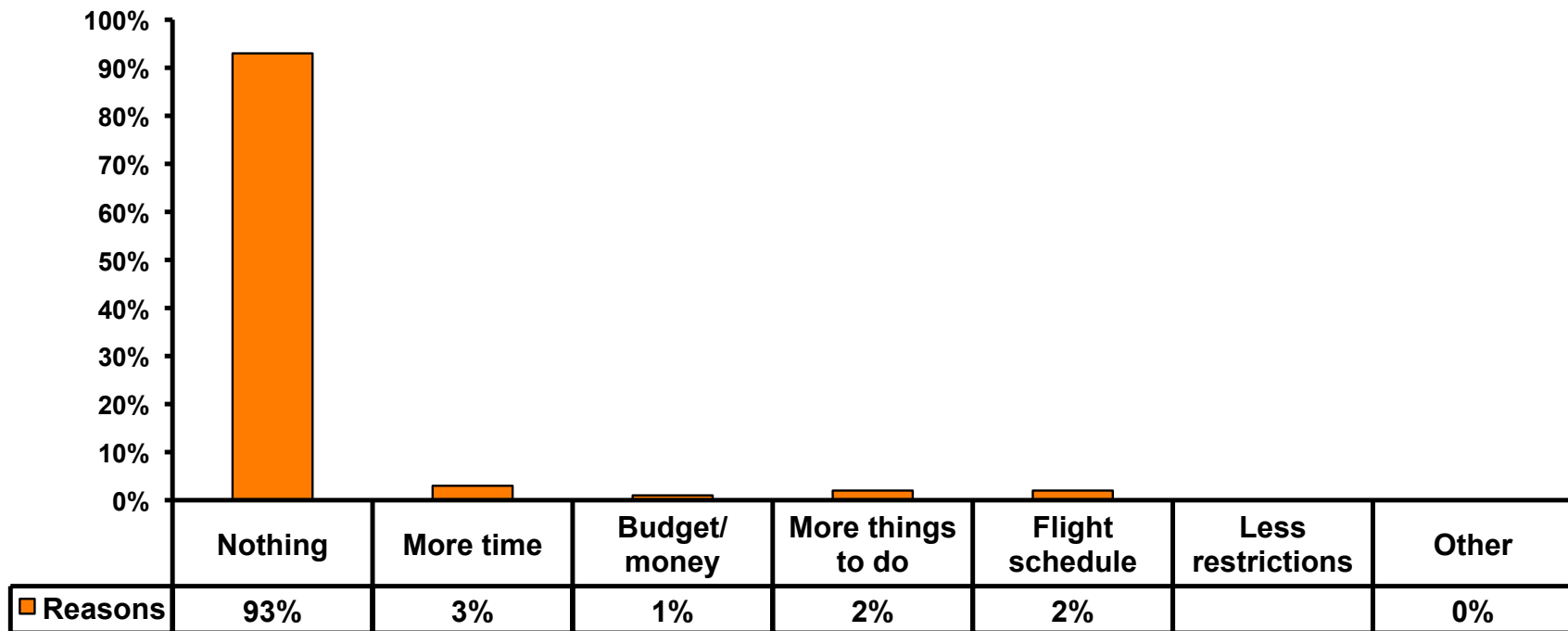
Satisfaction with Other Activities



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



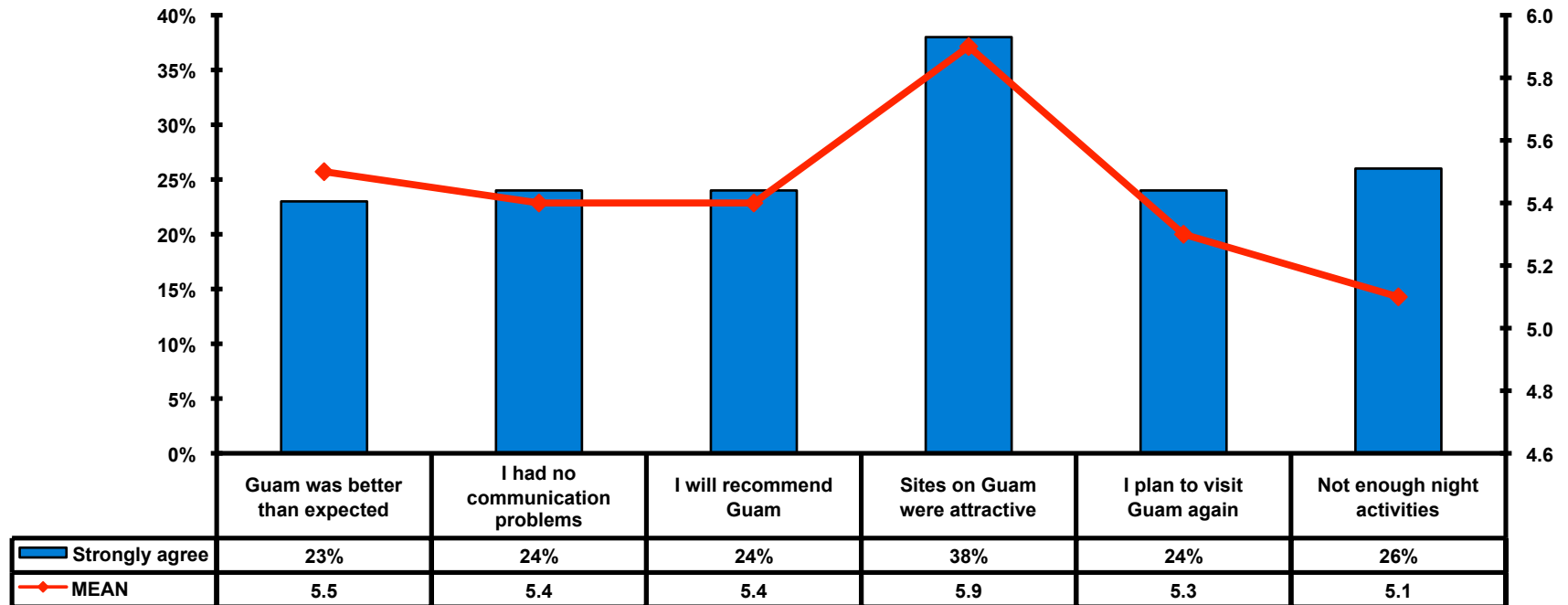
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

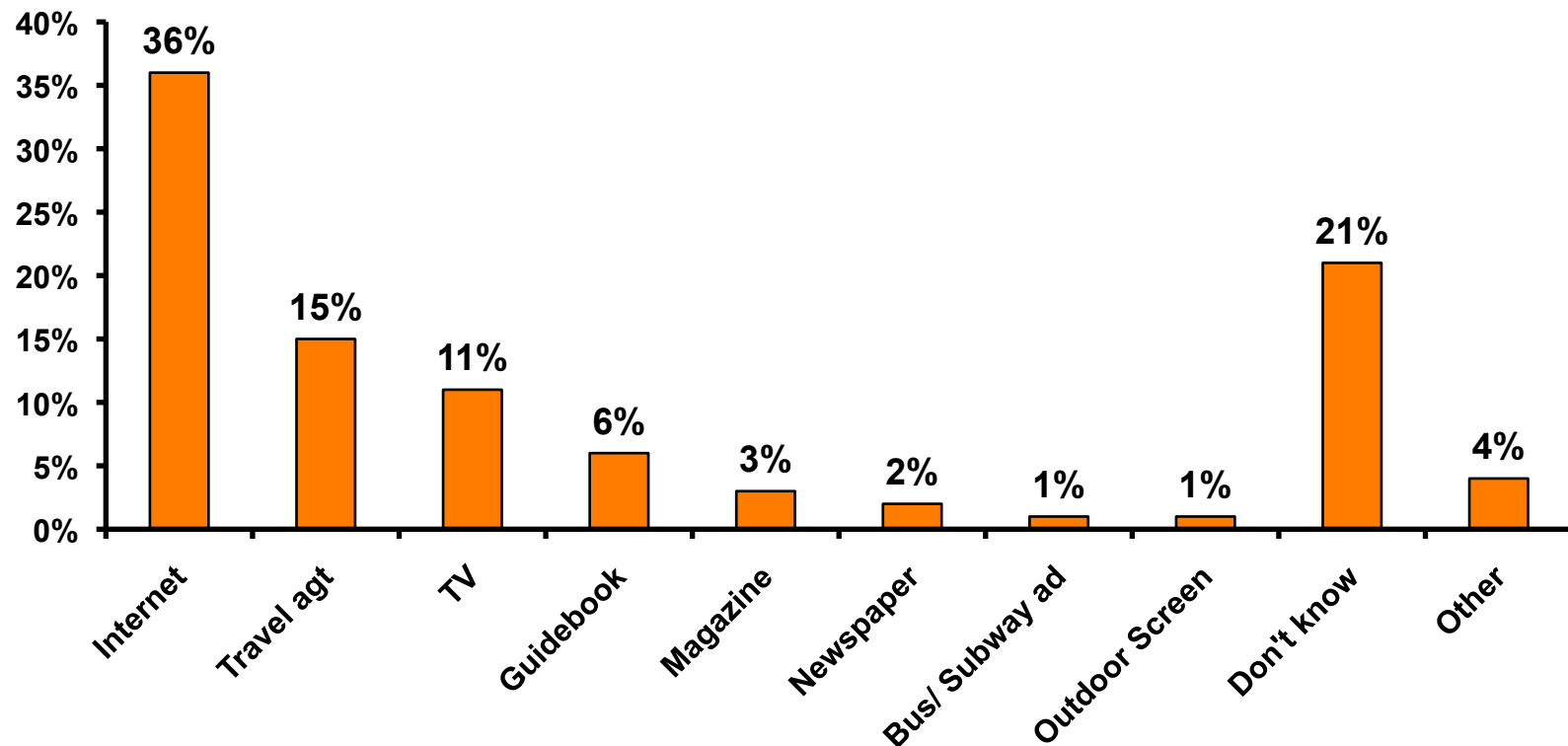
7=Very Satisfied/ 1=Very Dissatisfied



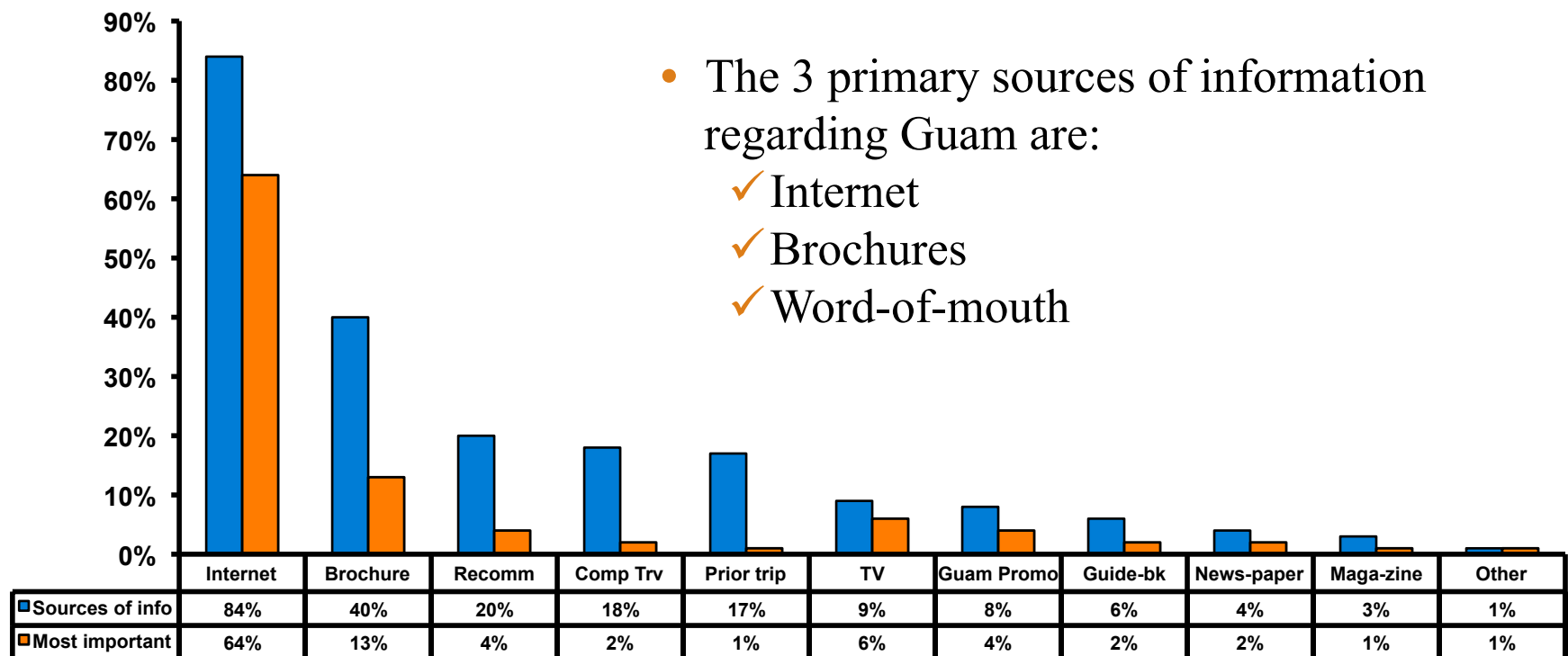
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

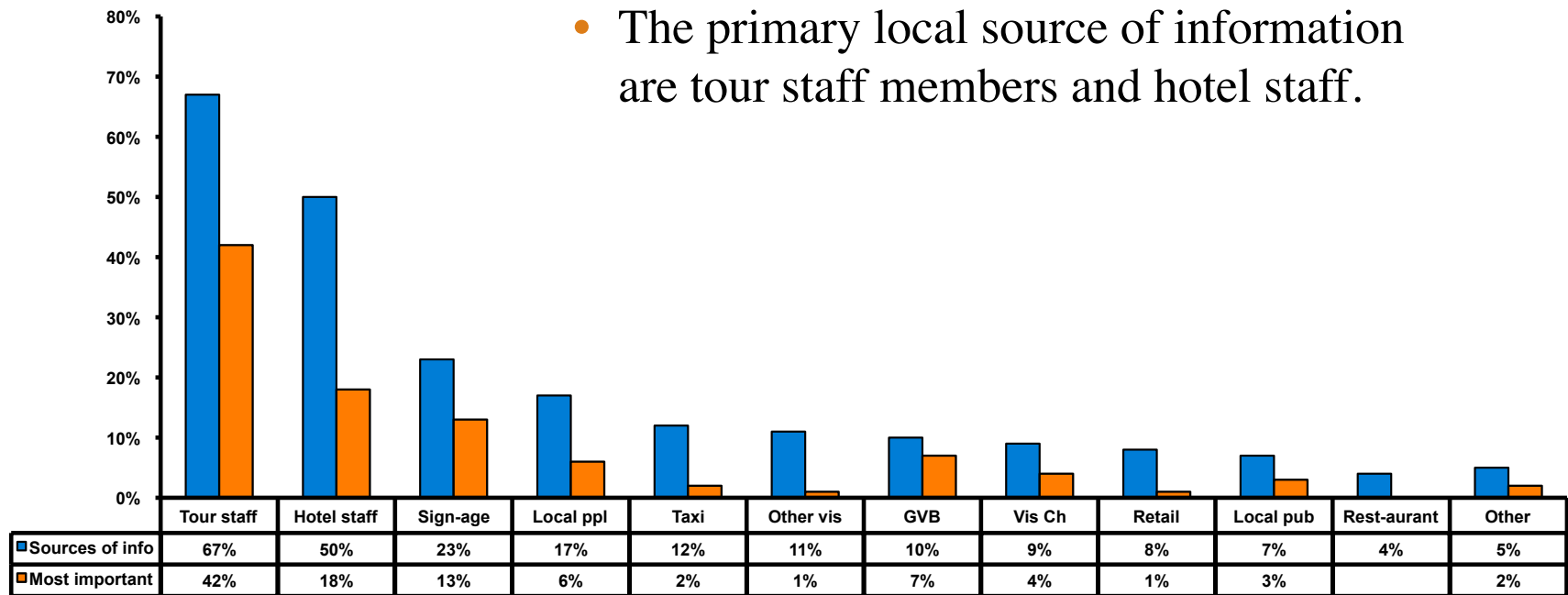


Sources of Information Pre-arrival



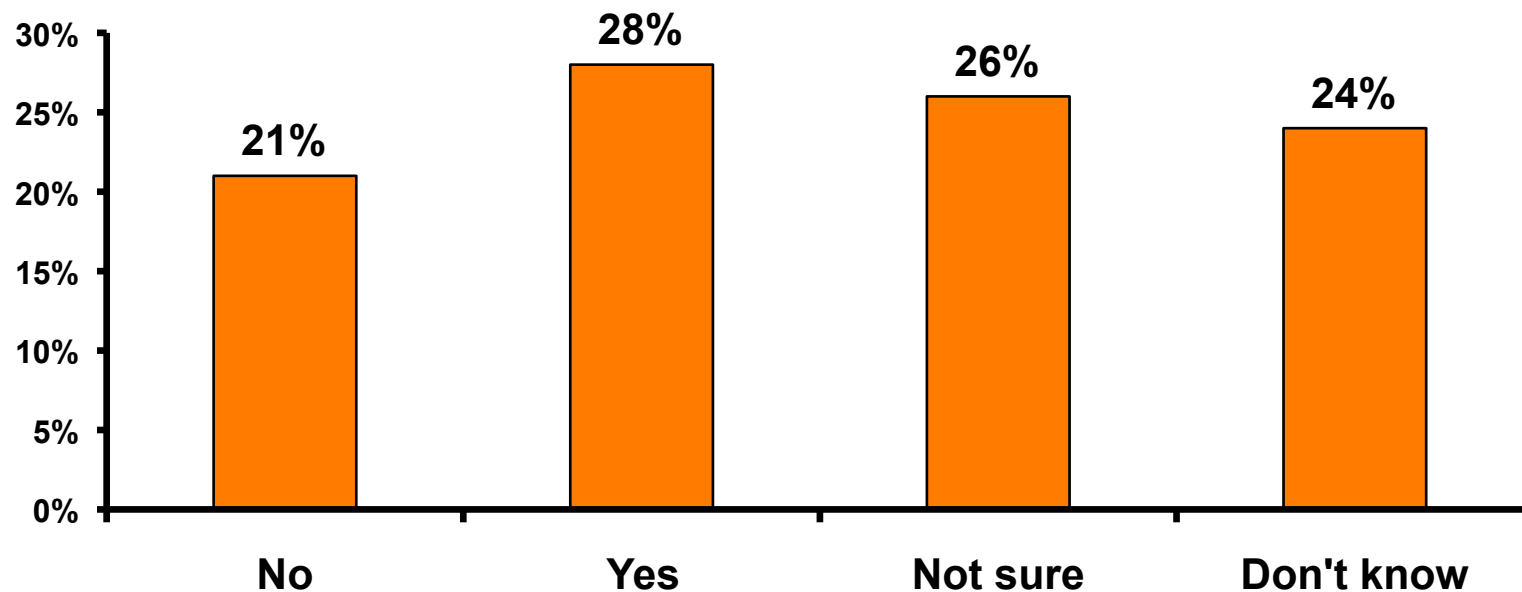
Sources of Information Post-arrival

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



SECTION 6
OTHER ISSUES

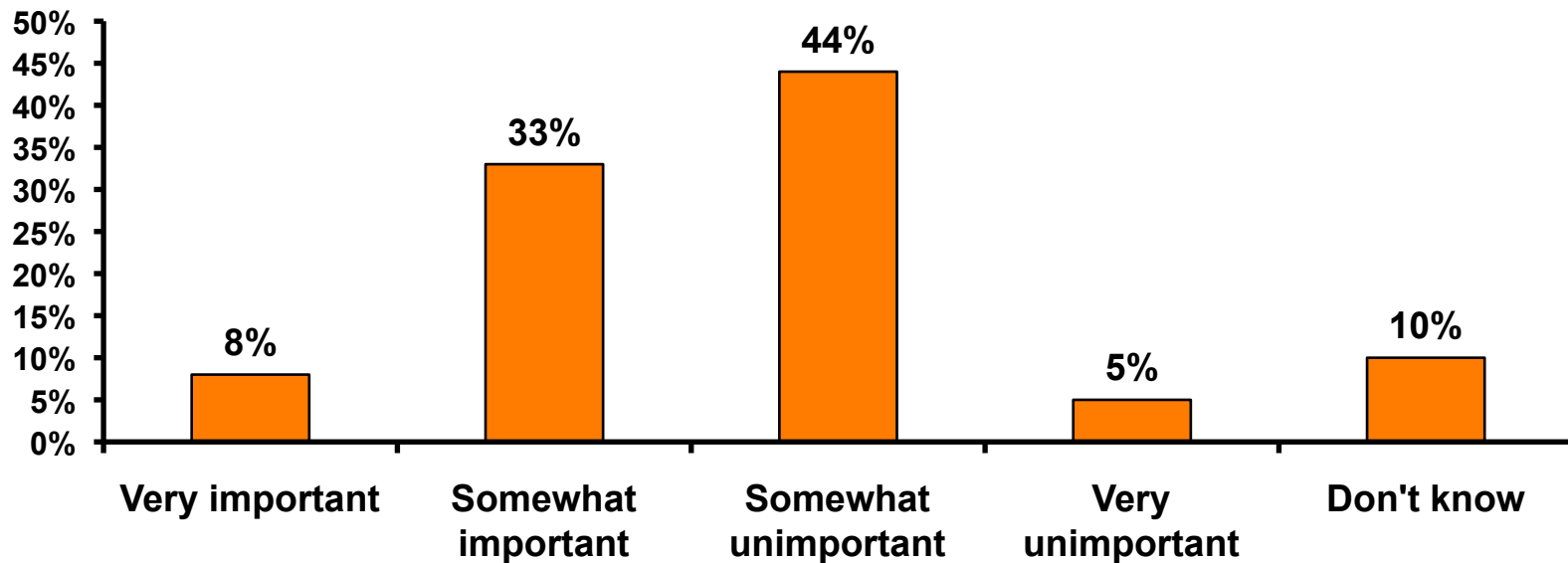
Good time to spend money on travel outside of Korea - Overall



Good time to spend money on travel outside of Korea by Age & Income

		AGE				PERSONAL INCOME				Refused
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.22	No	23%	20%	22%	17%	22%	15%	21%	29%	33%
	Yes	25%	29%	32%	33%	19%	30%	28%	31%	25%
	Not sure	30%	26%	24%	17%	31%	26%	33%	16%	
	Do not know	23%	25%	22%	33%	28%	29%	18%	24%	33%
Total	Count	97	187	50	18	32	126	108	70	8

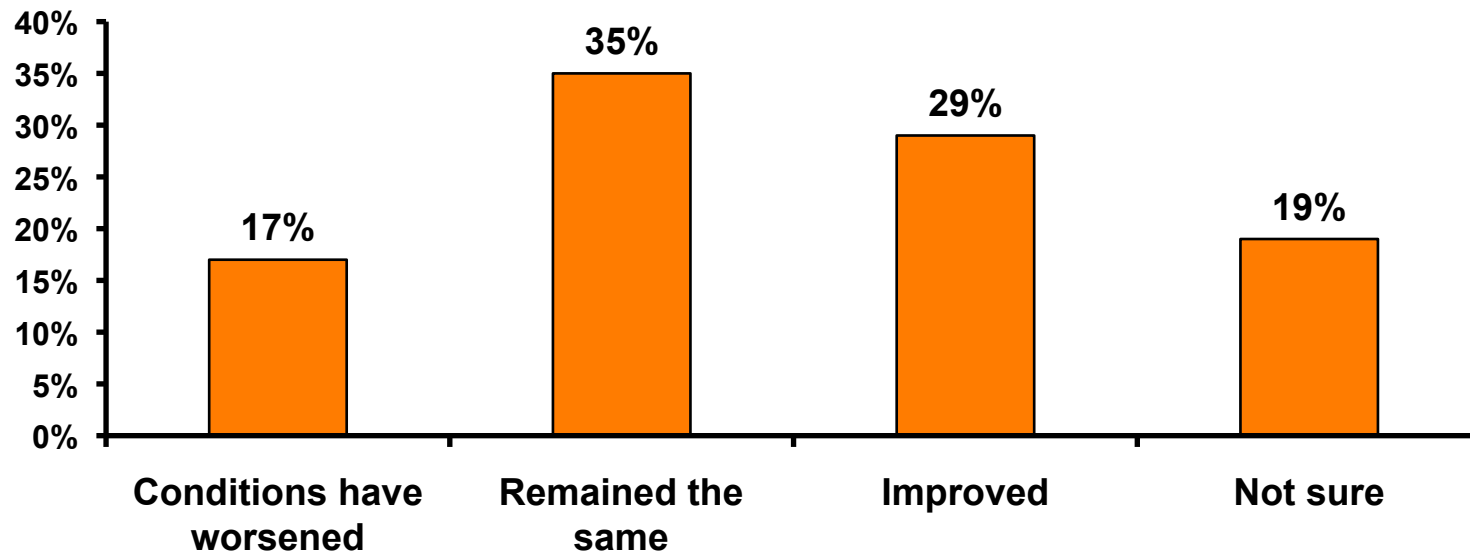
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



The importance of the state of the Korean economy in decision to travel outside of Korea by Age & Income

		AGE				PERSONAL INCOME				Refused
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.23	Very unimportant	7%	4%	4%	6%	3%	6%	5%	3%	38%
	Somewhat unimportant	39%	45%	52%	33%	34%	44%	46%	47%	13%
	Somewhat important	31%	33%	30%	44%	31%	33%	36%	30%	13%
	Very important	7%	11%	4%		19%	5%	6%	13%	
	Don't know	15%	7%	10%	17%	13%	13%	6%	7%	38%
Total	Count	97	187	50	18	32	126	108	70	8

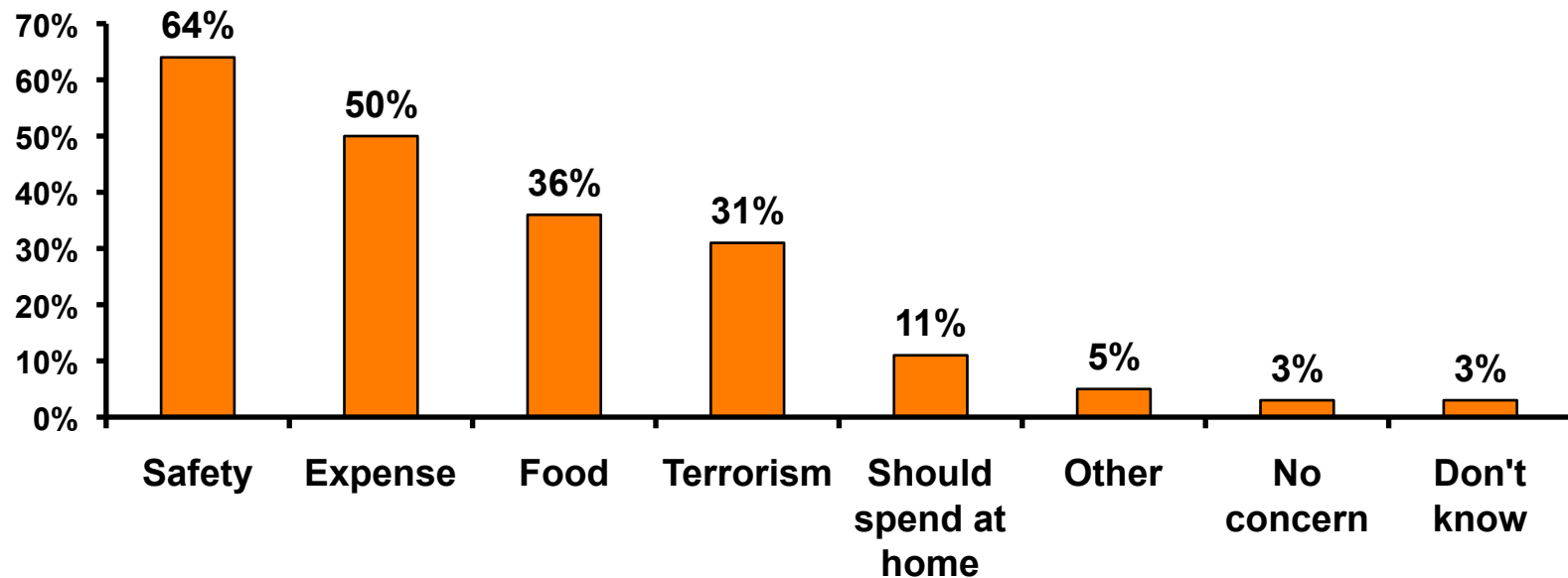
Rating Korean Economy Compared to 12 months ago



Rating Korean Economy Compared to 12 months ago by Age & Income

		AGE				PERSONAL INCOME				
		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	17%	17%	20%	17%	13%	15%	19%	17%	25%
	Conditions have remained the same	31%	37%	38%	33%	39%	39%	35%	29%	38%
	Conditions have improved	30%	28%	28%	33%	16%	27%	31%	39%	
	Do not know	22%	19%	14%	17%	32%	19%	15%	16%	38%
Total	Count	96	187	50	18	31	126	108	70	8

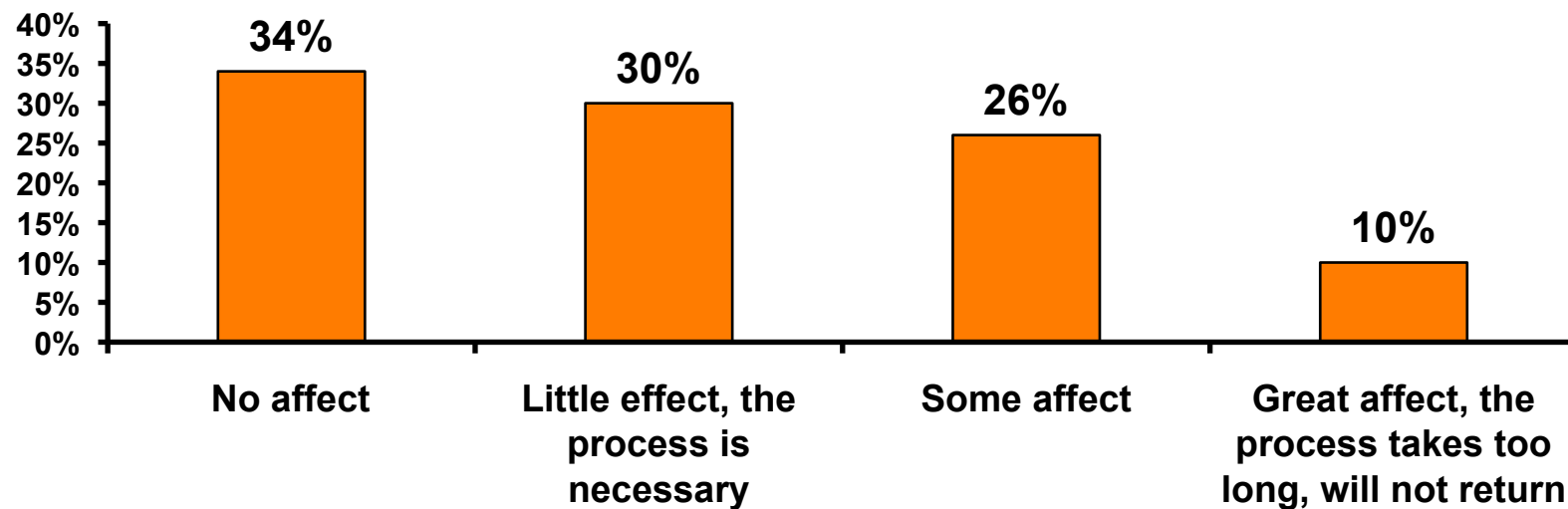
Concerns about travel outside of Korea - Overall



Concerns about travel outside of Korea - By Age & Income

		AGE				PERSONAL INCOME				
		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	53%	69%	72%	61%	50%	68%	67%	64%	13%
	Expense	49%	52%	48%	28%	47%	53%	51%	46%	50%
	Food	30%	40%	46%	6%	38%	40%	35%	36%	13%
	Terrorism	31%	34%	24%	28%	28%	34%	31%	30%	
	Spending money abroad when it should be spent at home	14%	9%	10%	17%	16%	11%	10%	11%	
	Other	4%	5%	6%		3%	6%	5%	3%	13%
	Do not know	5%	2%	2%	6%	6%	3%	1%	1%	38%
	No concerns	5%	2%		6%		4%	2%	4%	
Total	Cases	97	187	50	18	32	126	108	70	8

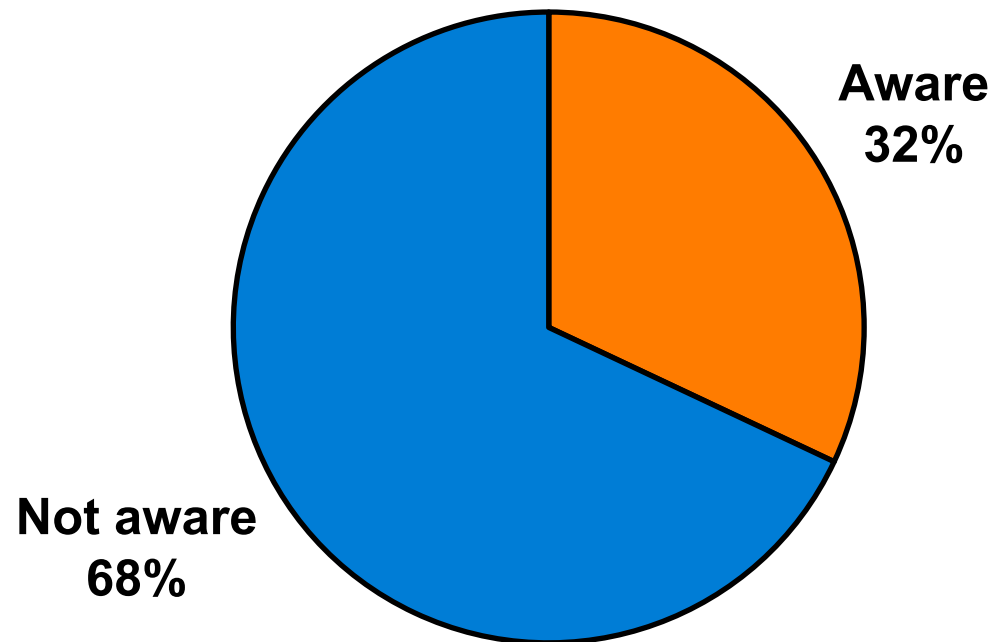
Security Screening/ Immigration Process at Guam International Airport



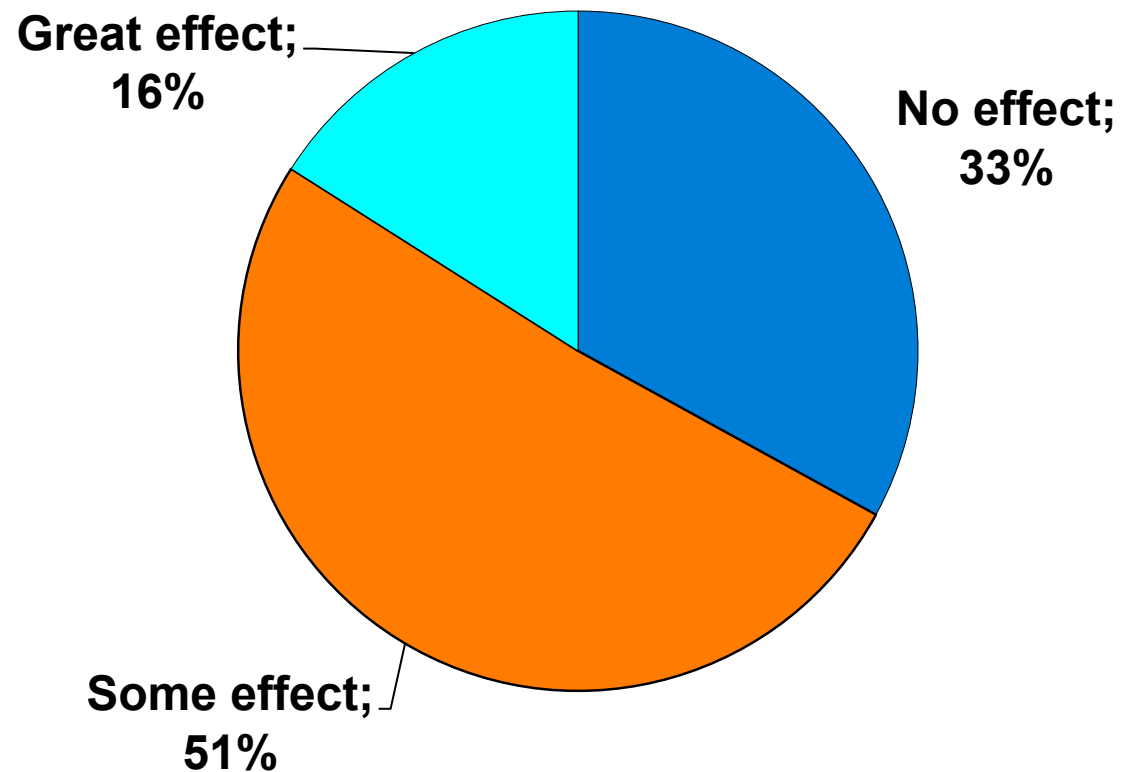
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.2** out of possible 7.0
- Agree (Score 6-7) – **12%**
- Neutral (Score 4-5) – **40%**
- Disagree (Score 1-3) – **49%**

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

