



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2010 OCTOBER 2009



Prepared by: QMark Research

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Background & Methodology

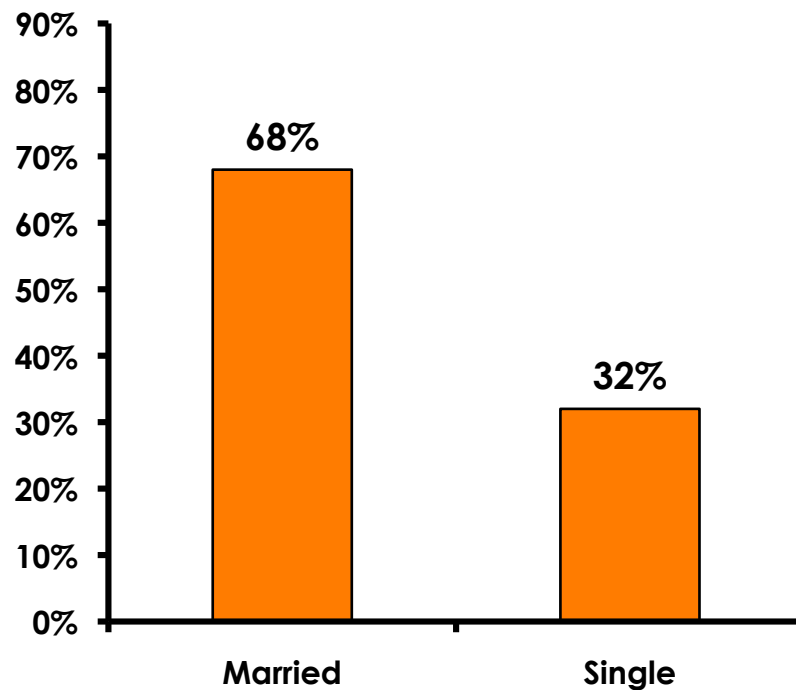
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

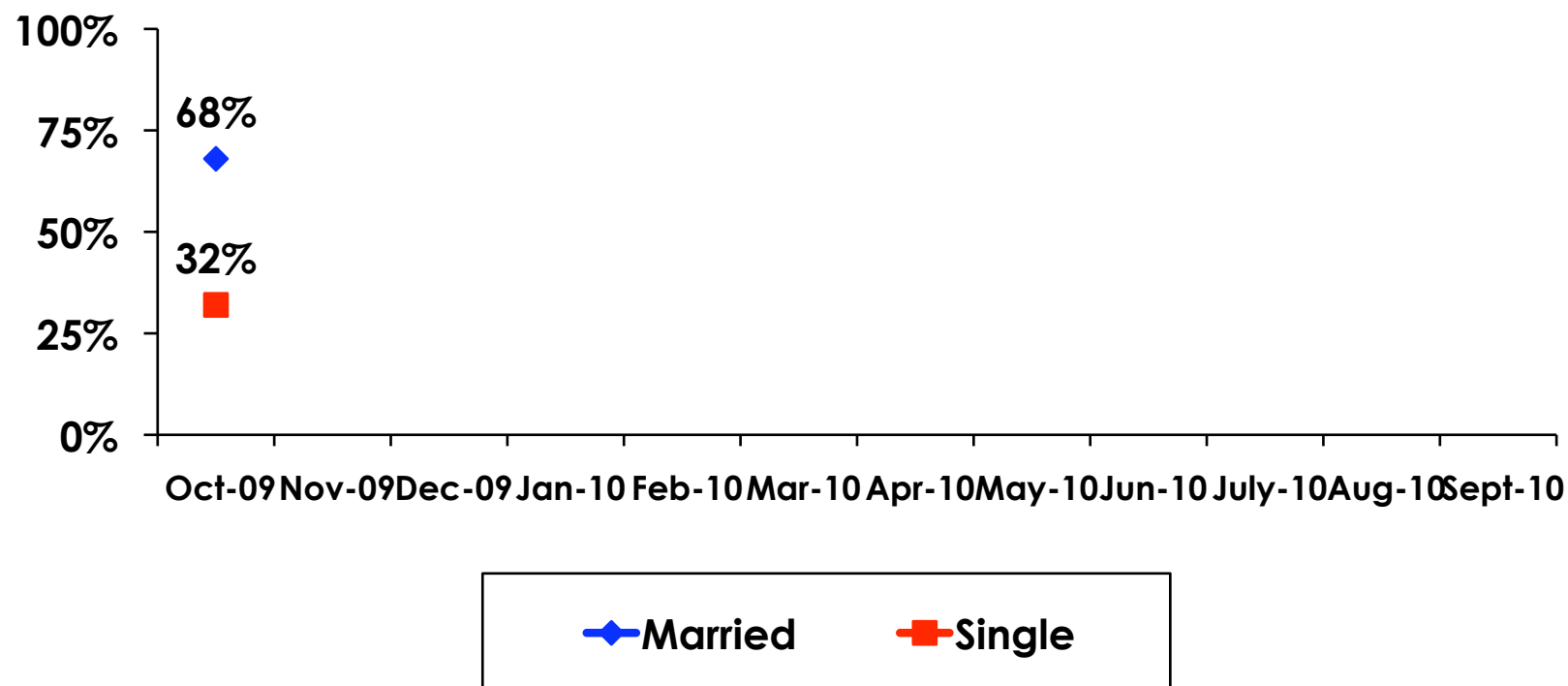
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

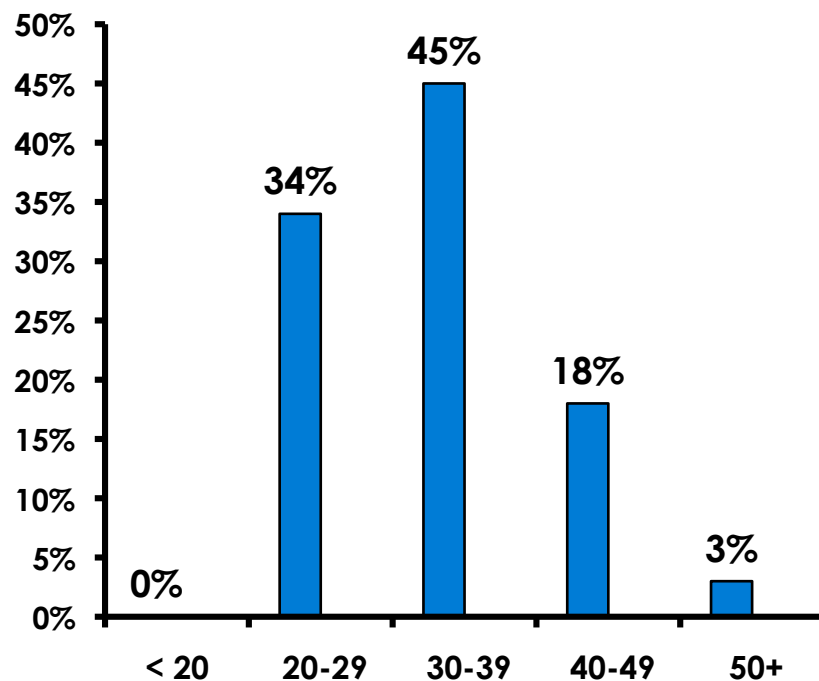


- A majority of visitors are married.

Marital Status

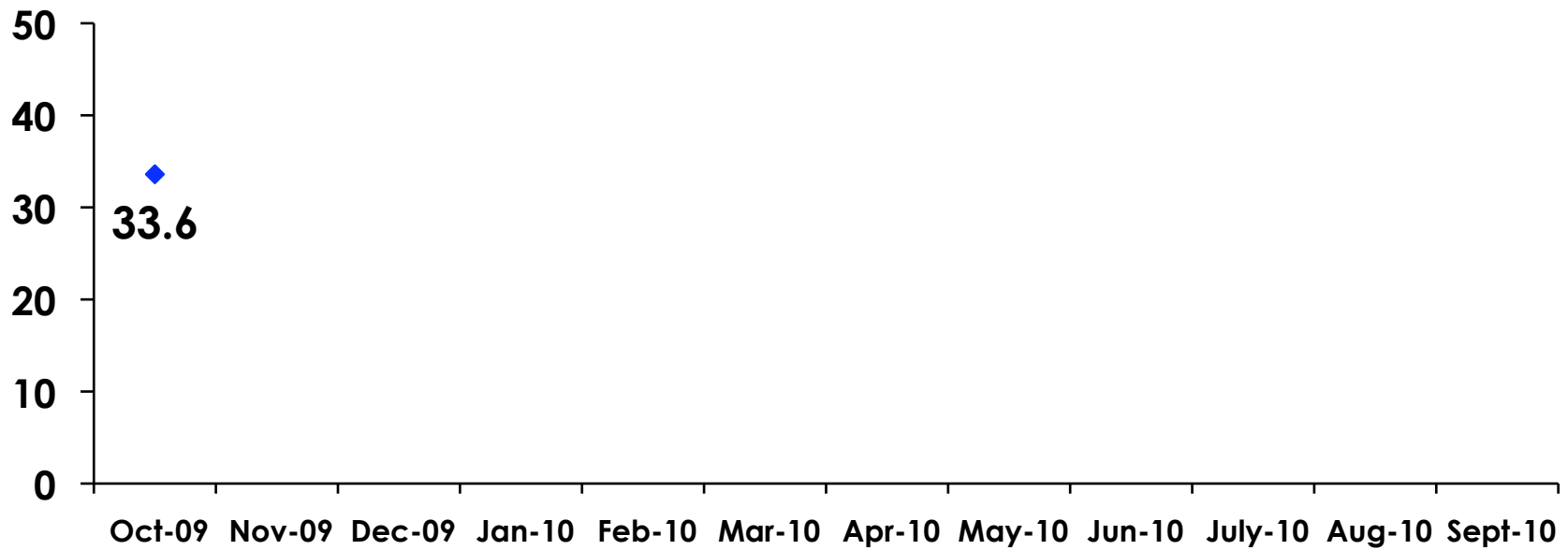


Age - Overall

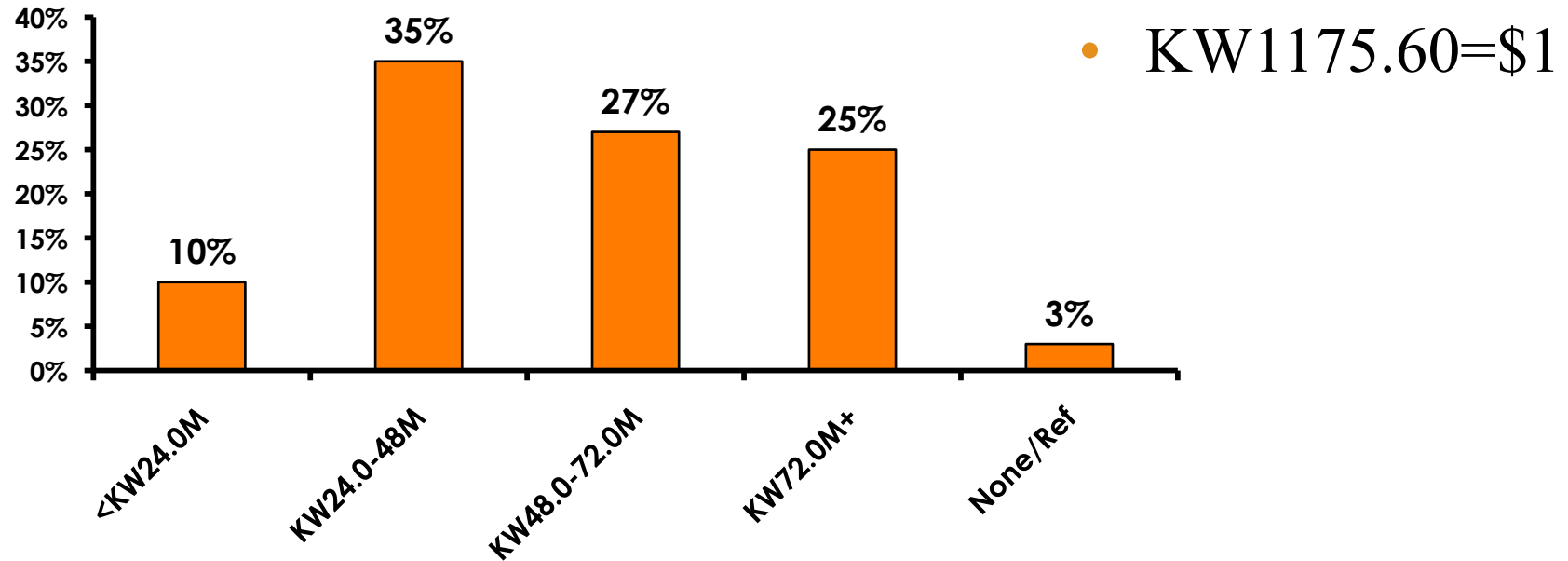


- The average age of the respondents is 33.6 years of age.

Average Age

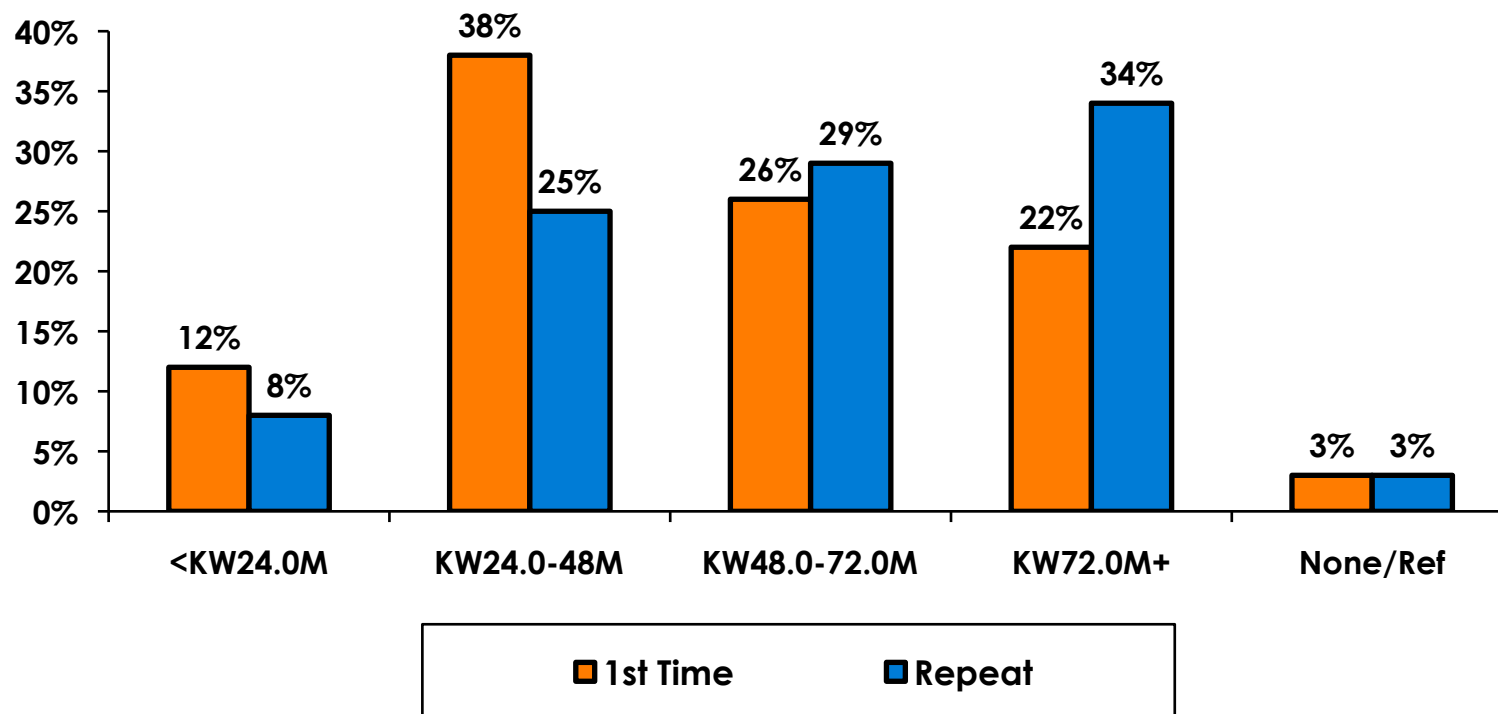


Personal Income



Personal Income

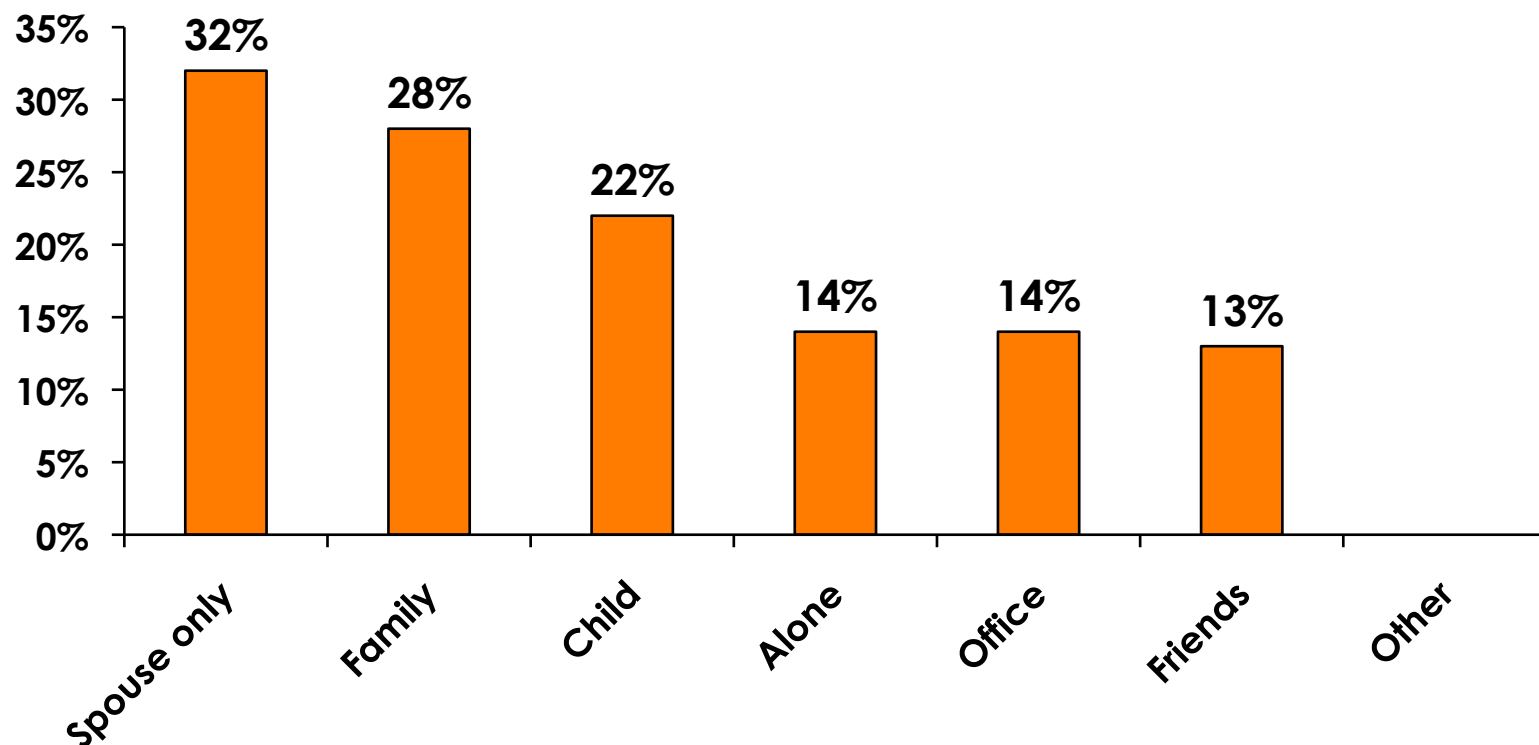
1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	36	12	24	1	26	5	2	2
			10%	7%	14%	100%	22%	3%	3%	22%
	KW24.0M-KW48.0M	Count	120	53	67		55	53	12	
			35%	31%	39%		47%	35%	19%	
	KW48.0M-KW72.0M	Count	93	53	40		13	53	26	1
			27%	31%	23%		11%	35%	41%	11%
	KW72.0M+	Count	85	49	36		18	39	23	5
			25%	29%	21%		15%	25%	37%	56%
	Refused	Count	10	4	6		6	3		1
			3%	2%	3%		5%	2%		11%
Total	Count		344	171	173	1	118	153	63	9

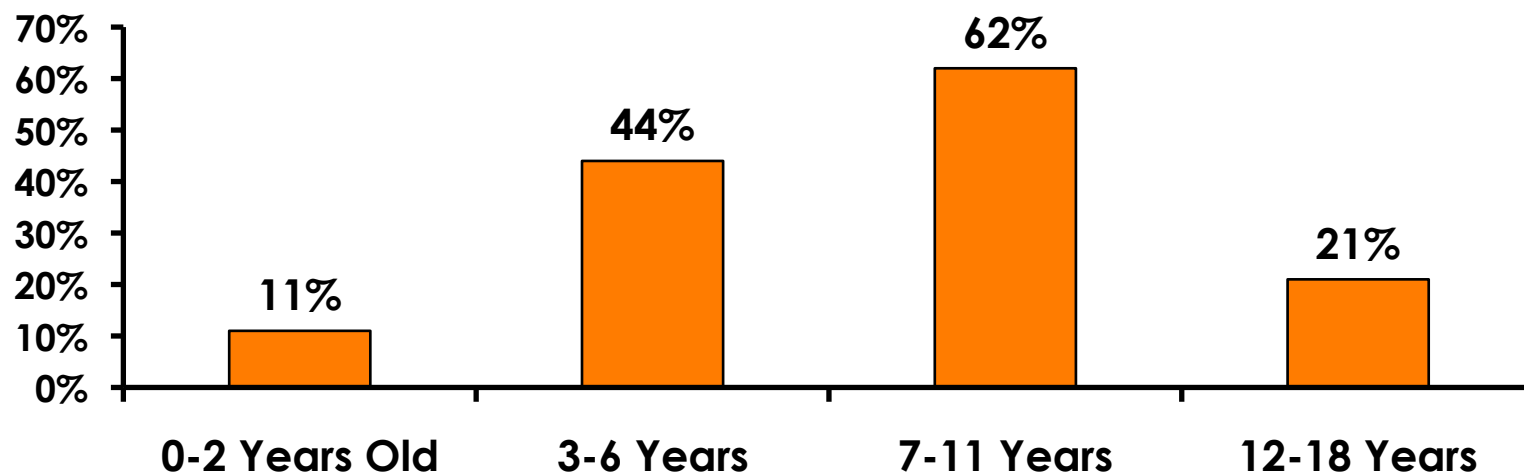
Travel Companions



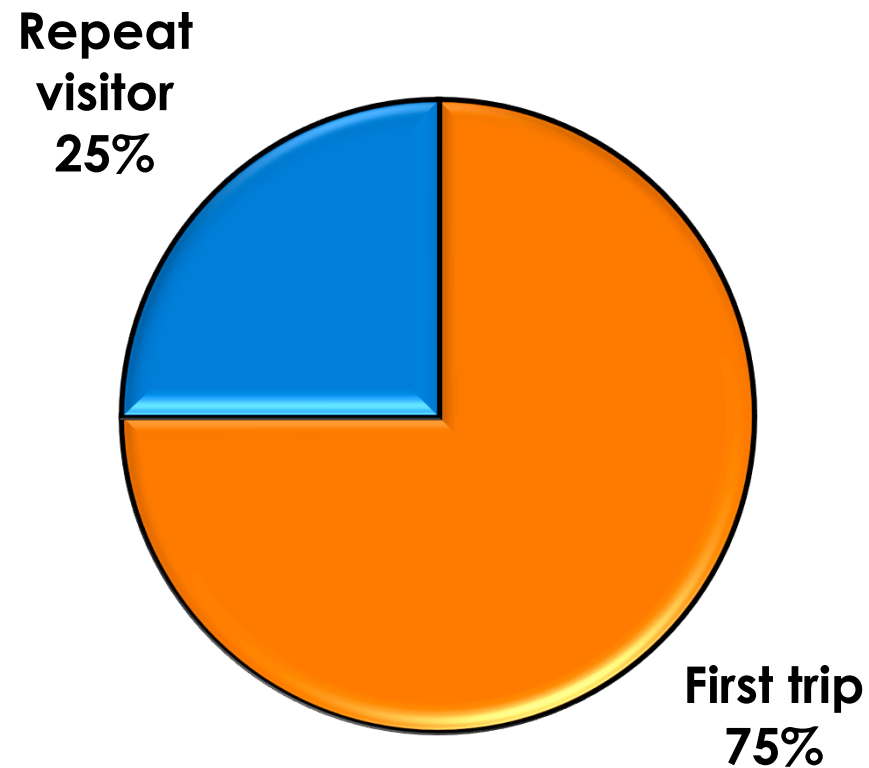
Number of Children Travel Party

N=79 total respondents traveling with children.

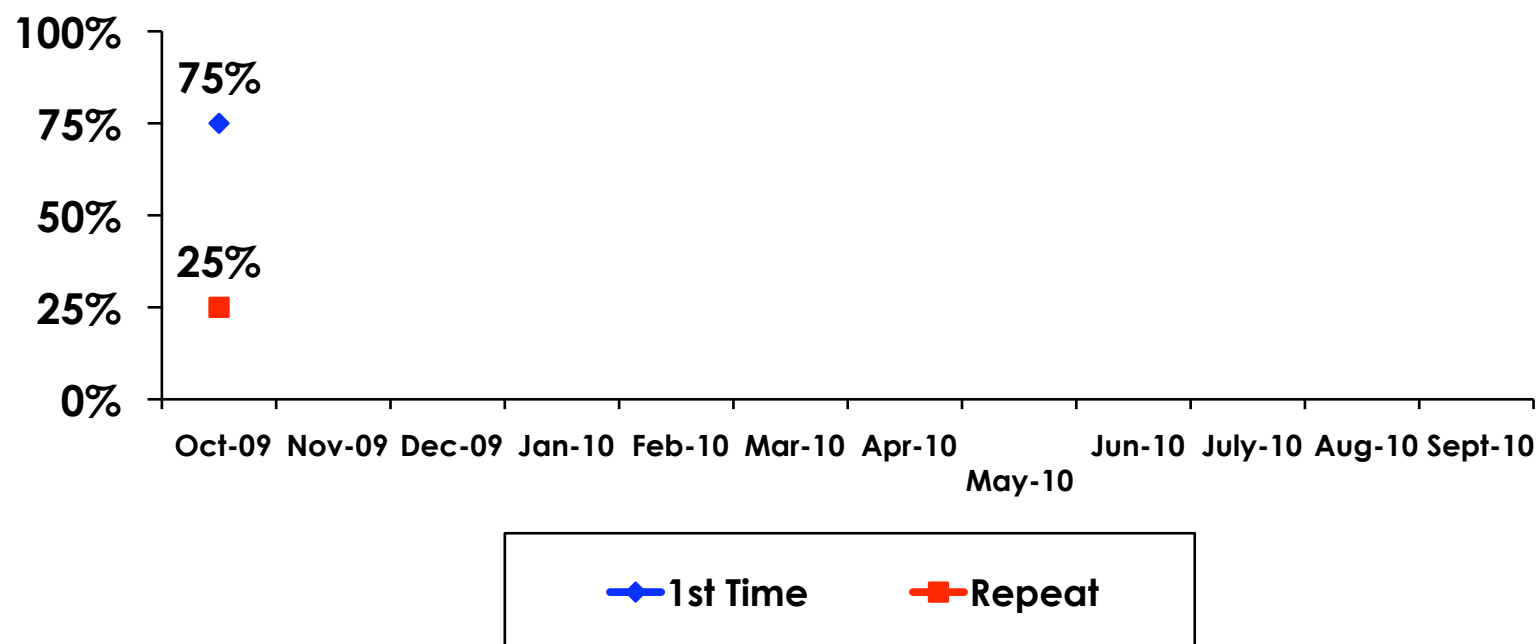
(Of those N=79 respondents, there is a total of 137 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



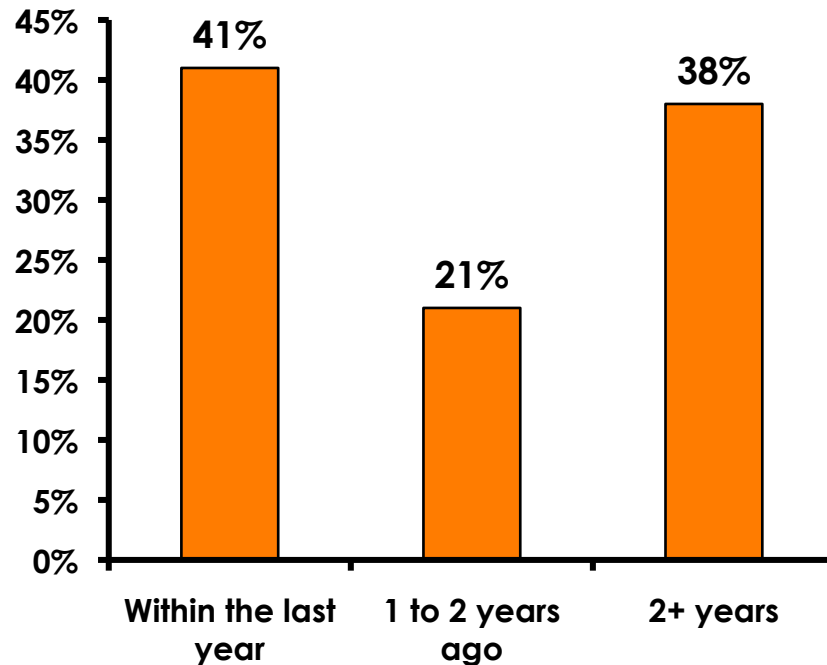
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1 st	Repeat
GENDER	Male	Count	174	135	39
			49%	51%	45%
	Female	Count	178	130	48
			51%	49%	55%
Total		Count	352	265	87
AGE	<20	Count	1	1	
			0%	0%	
	20-29	Count	119	101	18
			34%	38%	21%
	30-39	Count	158	117	41
			45%	44%	47%
	40-49	Count	65	43	22
			18%	16%	25%
	50+	Count	9	3	6
			3%	1%	7%
Total		Count	352	265	87

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

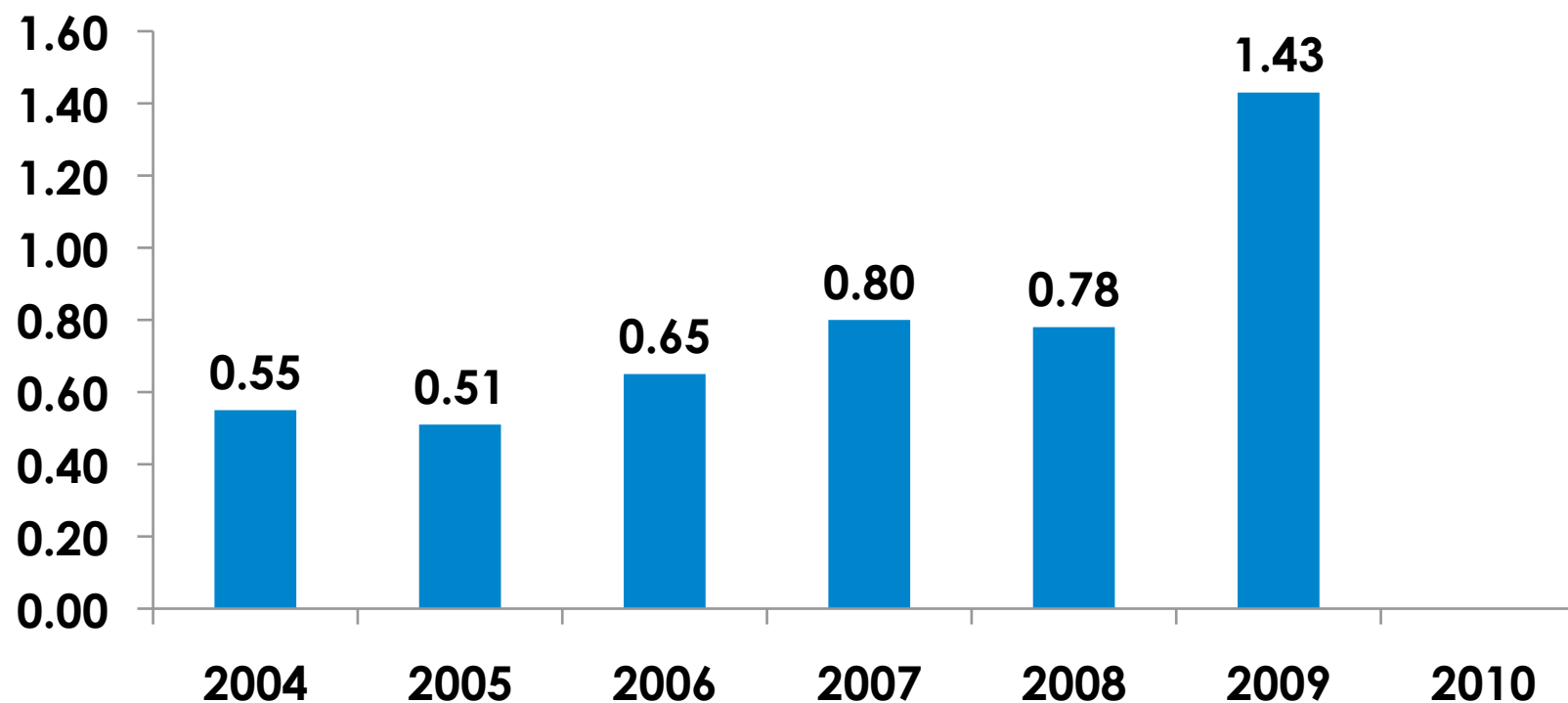
Repeat Visitors Last Trip

n = 85

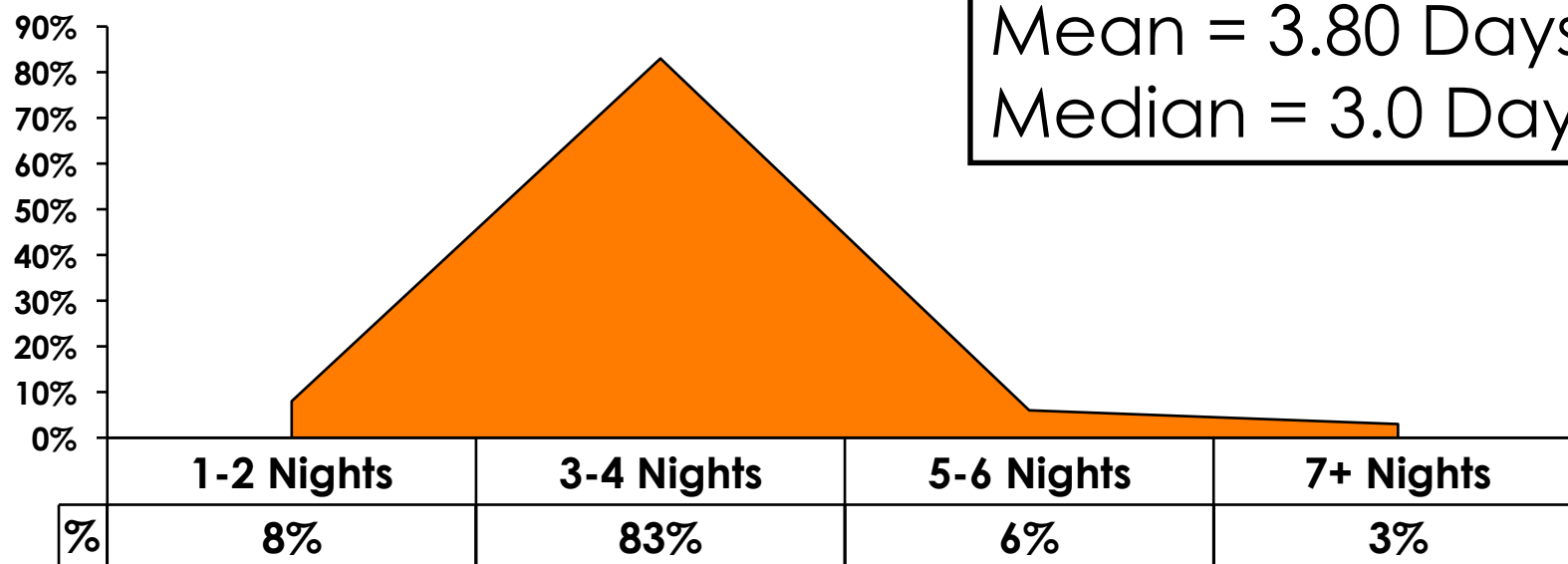


- The average repeat visitor has been to Guam 3.5 times.
- Two-thirds of the repeat visitors have been to Guam within the last 2 years.

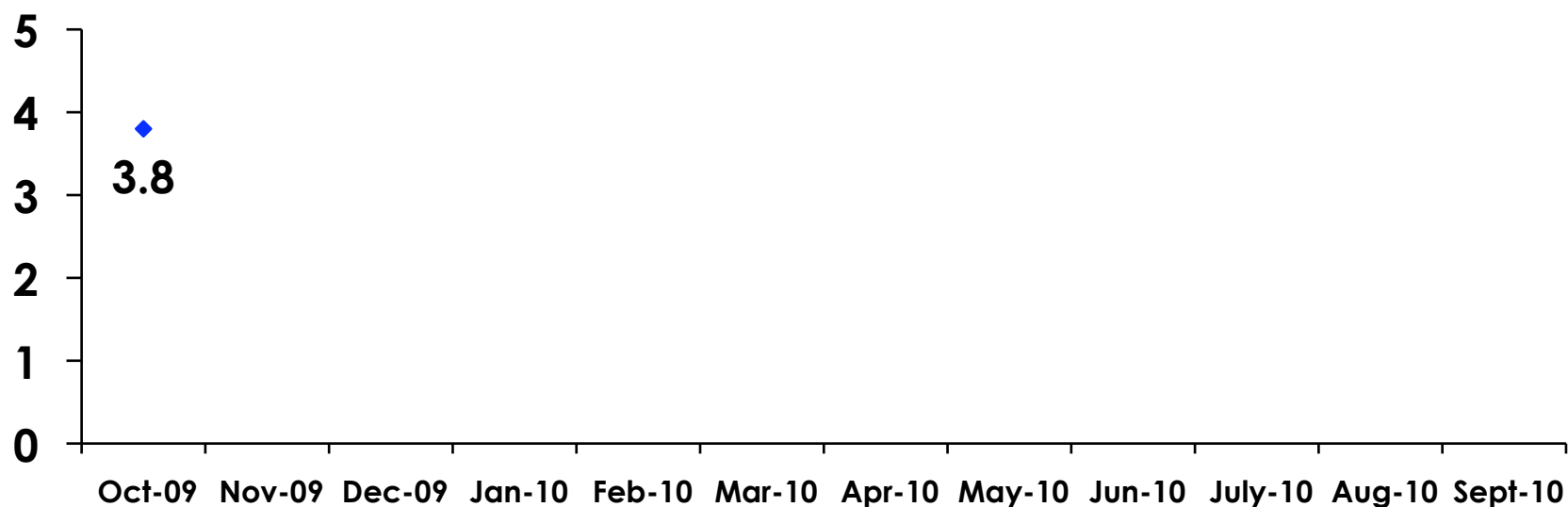
Average Number Overnight Trips (2004-2010) (2 nights or more)



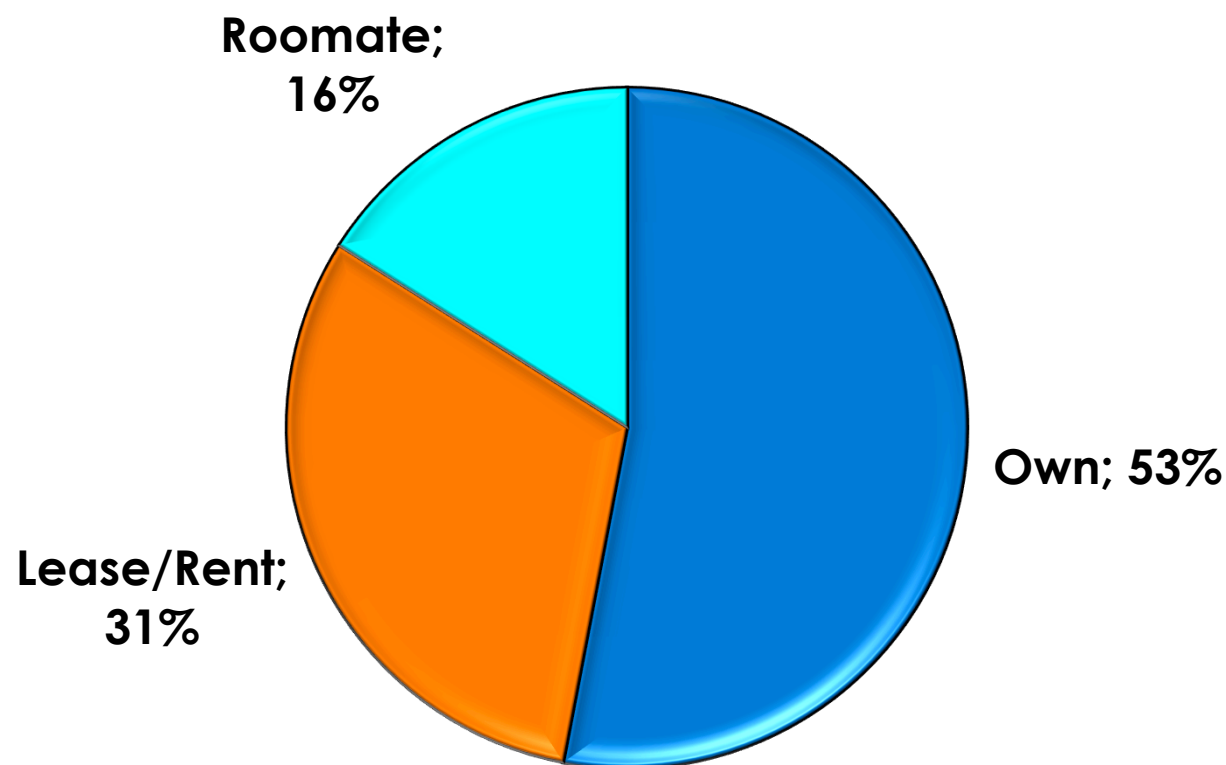
Length of Stay



Average Length of Stay



Living Accommodations

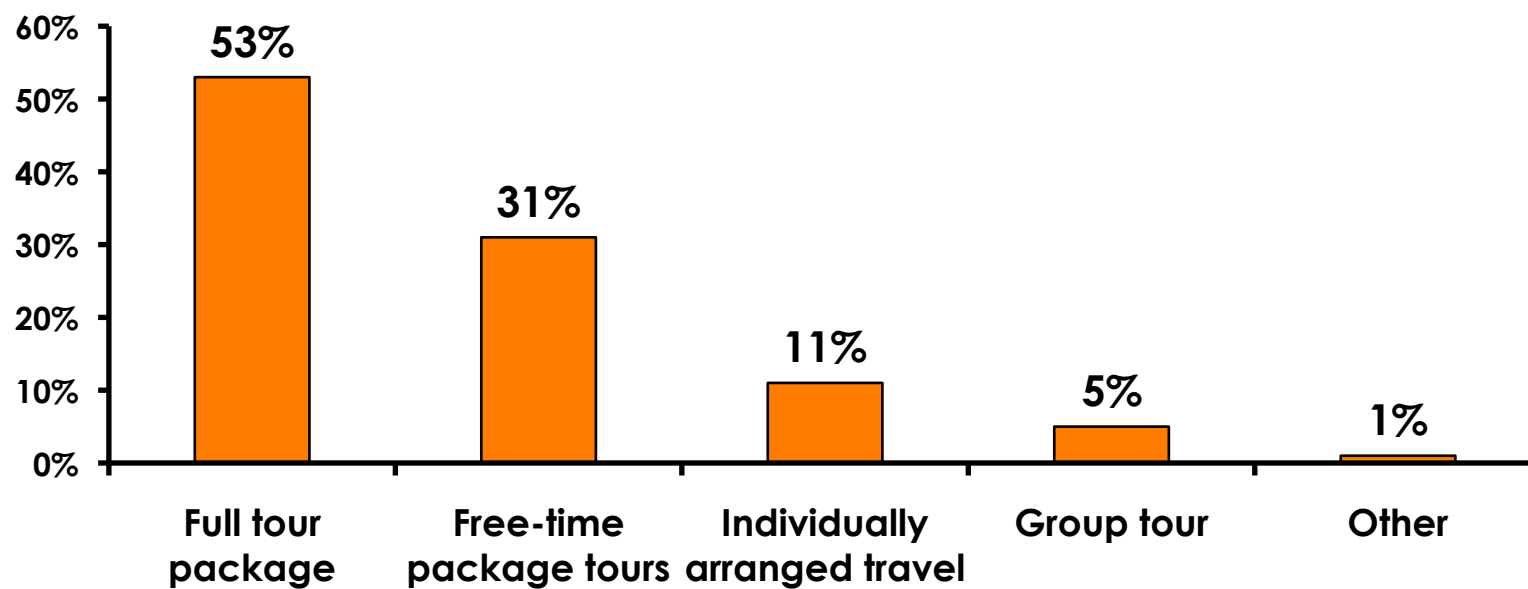


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	26%	14%	31%	27%	27%	10%
	Self-employed	17%	14%	18%	15%	19%	
	Prof/Specialist/Tech	13%	19%	13%	10%	13%	
	Homemaker	10%	3%	8%	12%	14%	
	Professor/Teacher	6%	19%	3%	10%		
	Service worker	5%	8%	7%	4%	4%	
	Manager	5%	3%	3%	6%	8%	30%
	Student	4%	8%	2%	3%	5%	
	Unemployed	3%	3%	3%	1%		
	Sales/Clerical	3%		3%	5%	2%	
	Free-lancer	3%	6%	3%	2%	1%	
	Other	2%	3%	3%	1%	1%	
	Judicial	1%			1%	2%	60%
	Govt - Office/non-mgr	1%		1%		2%	
	Govt-Mgr	1%		1%	1%	1%	
	Govt-Exec	0%			1%		
Total	Count	352	36	120	93	85	10

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

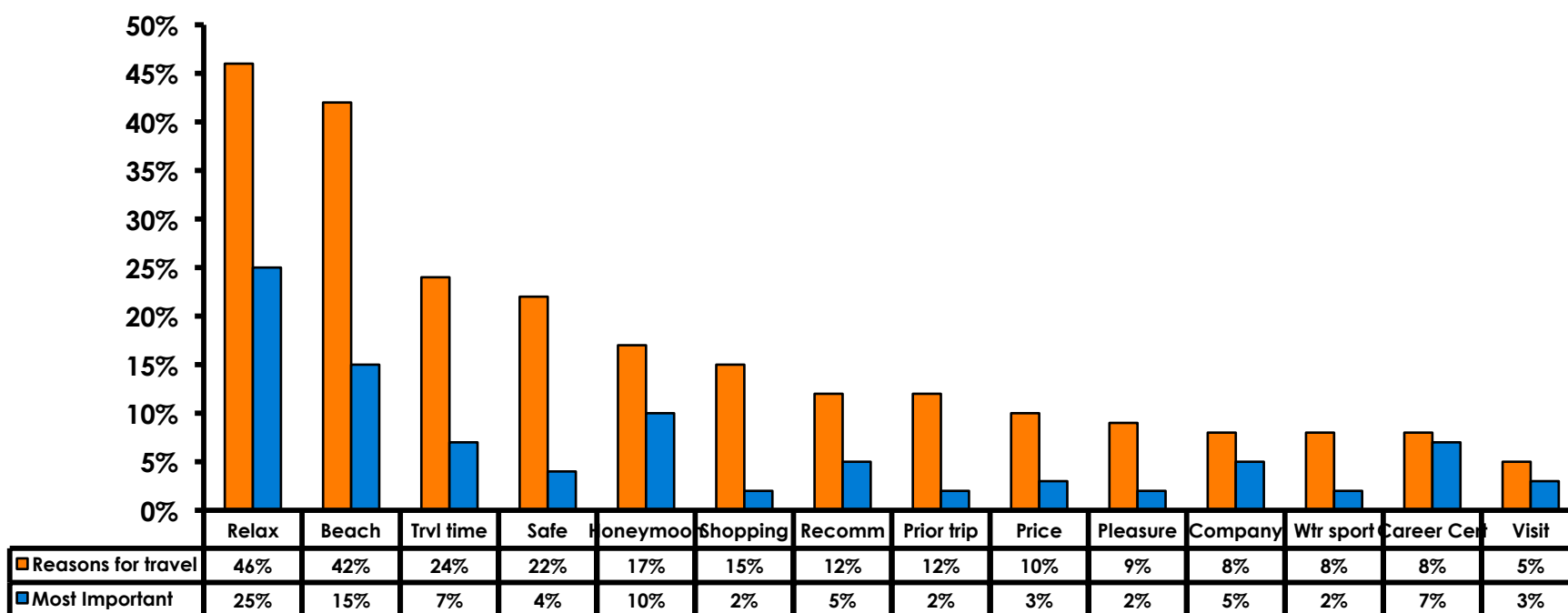


Accommodation by Income

Average length of stay: 3.80 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	46%	33%	49%	46%	48%	50%
	Hilton Guam Resort & Spa	11%	14%	10%	12%	11%	10%
	Sheraton Laguna Resort	11%	28%	10%	13%	1%	
	The Westin Resort Guam	8%	11%	9%	2%	9%	20%
	Onward Beach Resort	5%		4%	8%	6%	
	Hyatt Regency Guam	4%		1%	5%	9%	
	Ohana Bayview Hotel	3%	8%	2%	2%	2%	
	Relatives, Friends, Home Stay	3%	3%	4%	1%	2%	
	Holiday Resort Guam	2%		4%	1%	2%	
	Condominium	2%	3%	1%	1%	2%	
	Ramada Suites Guam	1%			3%	2%	
	Outrigger Guam Resort	1%		3%	1%		
	Hotel Sane Fe	1%		2%	1%		10%
	Leo Palace Resort	1%			1%	1%	
	Apartment	1%			1%	1%	
	Fiesta Resort Guam	1%		1%	1%		
	Hotel Nikko Guam	0%				1%	
	Royal Orchid Guam	0%		1%			
	Other	0%					10%
Total	Count	351	36	120	92	85	10

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

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

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

Motivation by Age & Gender

		TOTAL	AGE					GENDER	
			<20	20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	46%	100%	41%	49%	48%	33%	43%	48%
	Beautiful seas, beaches, tropical climate	42%		39%	41%	48%	67%	41%	42%
	Short travel time	24%		23%	27%	20%	33%	21%	28%
	It is a safe place to spend a vacation	22%		14%	23%	31%	33%	24%	20%
	Honeymoon	17%		23%	20%	3%		24%	11%
	Shopping	15%		16%	16%	14%		11%	20%
	Recommendation of friend, relative, travel agency	12%		16%	10%	11%	11%	9%	15%
	A previous visit	12%		7%	13%	15%	22%	8%	15%
	Price of the tour package	10%		10%	11%	6%	11%	10%	10%
	Pleasure	9%		6%	8%	15%	22%	7%	11%
	My company sponsored me	8%		8%	6%	14%		5%	11%
	Water sports	8%		8%	9%	6%		5%	11%
	Career certification or testing	8%		16%	6%			9%	7%
	To visit friends or relatives	5%	100%	1%	3%	8%	56%	4%	6%
	To golf	3%		1%	3%	6%	22%	6%	1%
	Company or Business trip	3%			2%	11%		5%	1%
	Organized Sporting Activity	3%		1%	2%	8%		4%	1%
	Other	2%		2%	3%	2%	11%	2%	3%
	SCUBA diving	2%		3%	2%			2%	1%
	Convention, Conference, Trade show	1%		1%		6%		1%	2%
	To get married or Attend wedding	1%			3%			2%	1%
	Promotional materials from GVB	1%		3%		2%		1%	1%
	Special promotion	1%		1%	2%			1%	1%
Total	Cases	352	1	119	158	65	9	174	178

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	46%	33%	48%	44%	54%	30%
	Beautiful seas, beaches, tropical climate	42%	25%	43%	43%	47%	40%
	Short travel time	24%	22%	20%	28%	27%	20%
	It is a safe place to spend a vacation	22%	11%	21%	17%	34%	10%
	Honeymoon	17%	25%	22%	16%	7%	10%
	Shopping	15%	3%	15%	19%	18%	10%
	Recommendation of friend, relative, travel agency	12%	14%	16%	8%	12%	
	A previous visit	12%	8%	7%	16%	18%	
	Price of the tour package	10%	8%	8%	11%	12%	10%
	Pleasure	9%	6%	8%	11%	11%	10%
	My company sponsored me	8%	31%	5%	11%	2%	
	Career certification or testing	8%	6%	8%	4%	11%	30%
	Water sports	8%	8%	8%	9%	7%	10%
	To visit friends or relatives	5%	6%	3%	4%	6%	10%
	To golf	3%	3%	1%	2%	8%	10%
	Company or Business trip	3%	3%	3%	2%	4%	
	Organized Sporting Activity	3%		1%	4%	4%	
	Other	2%		3%	3%	1%	
	SCUBA diving	2%		3%	2%	1%	
	To get married or Attend wedding	1%	3%	1%	1%	1%	10%
	Convention, Conference, Trade show	1%	3%	1%	1%	1%	
	Promotional materials from GVB	1%		2%	1%		10%
	Special promotion	1%		3%	1%		
Total	Cases	352	36	120	93	85	10

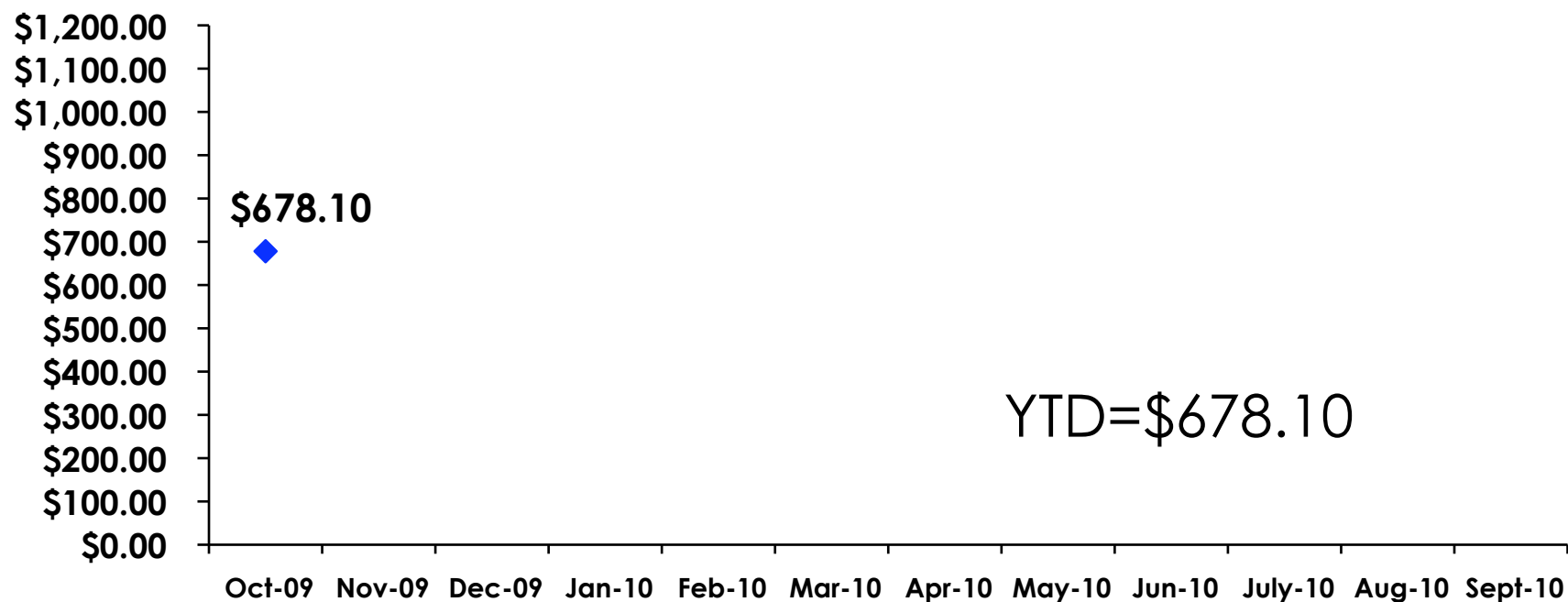
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1175.60/US\$1

- \$1,404.20 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$6,634 = maximum (highest amount recorded for the entire sample)
- \$678.10 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

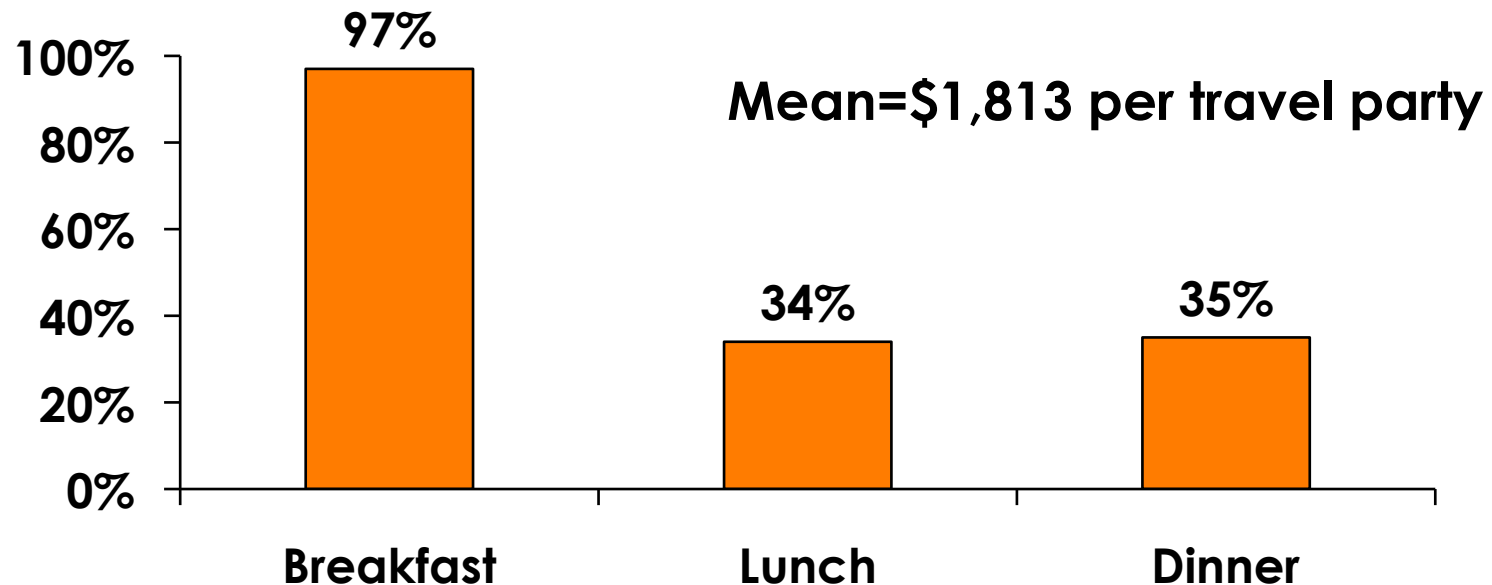
KW1175.60=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,423
Air & Accommodation w/ daily meal package	\$1,813
Air only	\$568
Accommodation only	\$424
Accommodation w/ daily meal only	\$693
Food & Beverages in Hotel	\$162
Ground transportation – Korea	\$68
Ground transportation – Guam	\$89
Optional tours/ activities	\$332
Other expenses	\$401
Total Prepaid	\$1,404

Prepaid Meal Breakdown

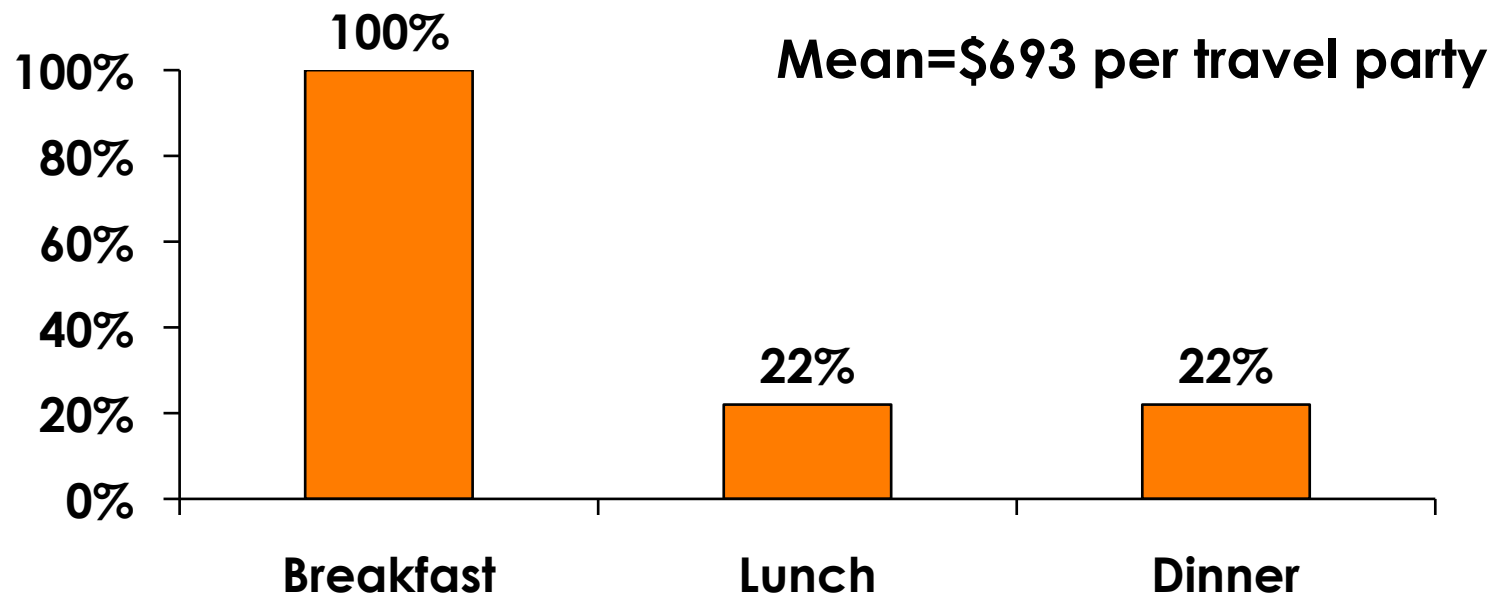
Air/ Accommodations with Daily Meal Package
n=158



Prepaid Meal Breakdown

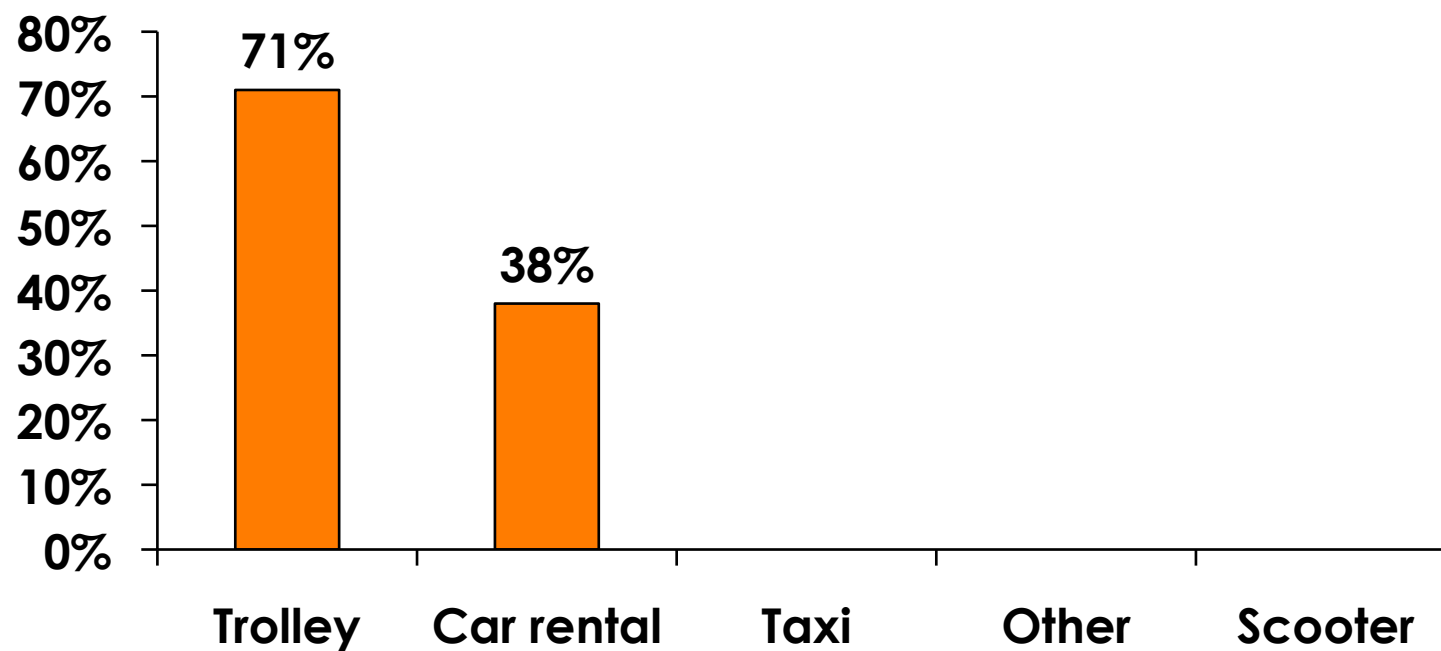
Accommodations with Daily Meal Package

n=9



Prepaid Ground Transportation

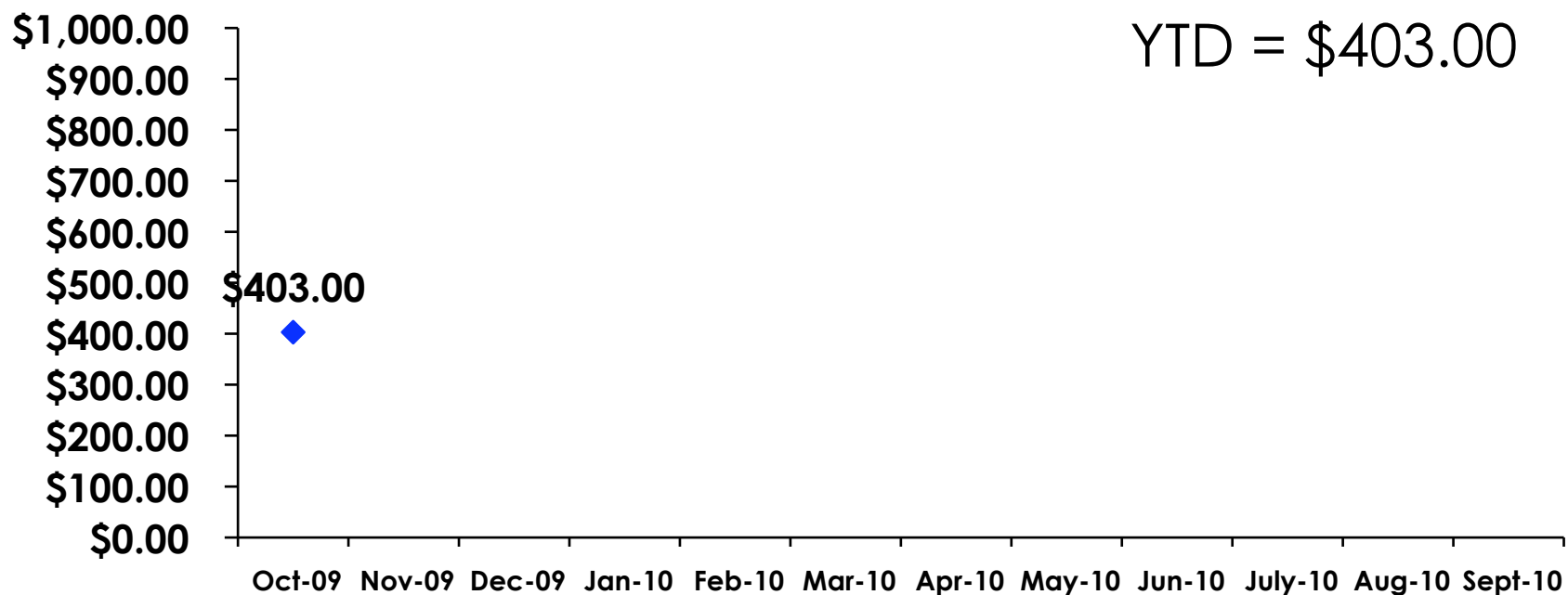
n=21



On-Island Expenditures

- \$825.30 = 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)
- \$403.00 = overall mean average per person on-island expenditure

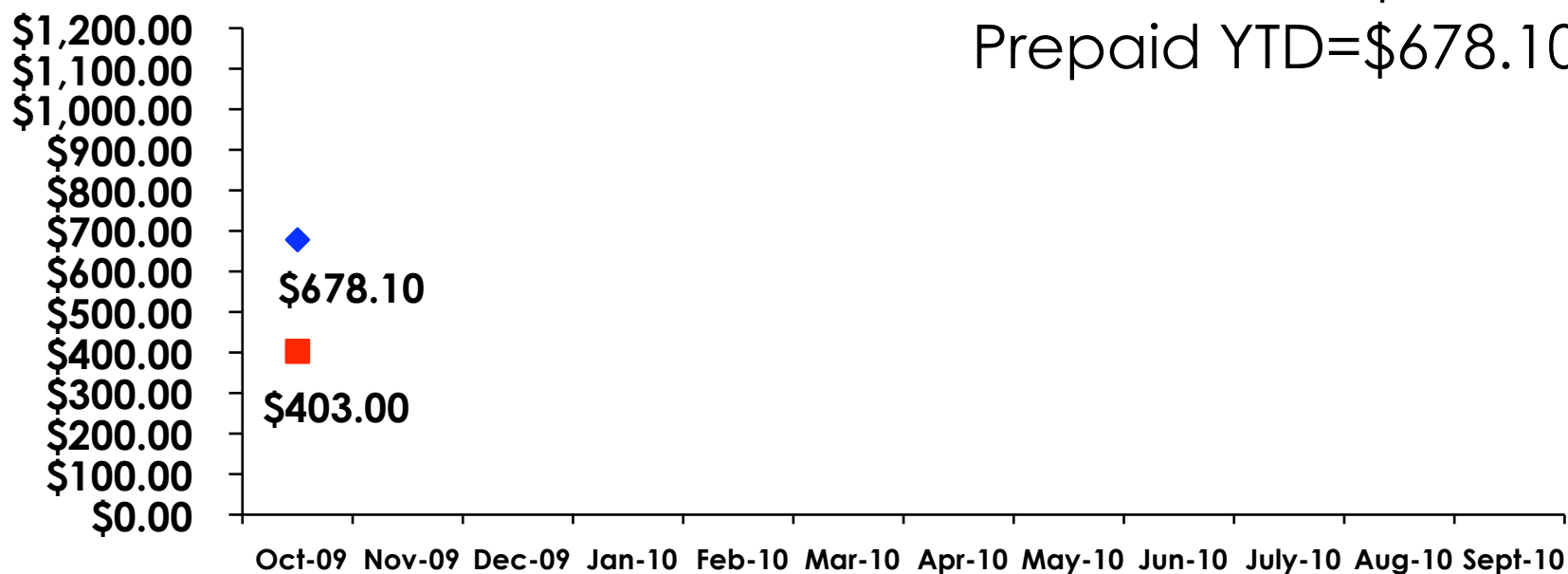
On-Island Expenditures Tracking



Prepaid / On-Island Expenditures

On-Isle YTD = \$403.00

Prepaid YTD=\$678.10



◆ Prepaid

■ On-isle

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	\$825.27	\$908.09	\$744.30	\$1,050.81	\$846.39	\$956.22	\$719.14	\$3,000.00	\$742.06	\$705.05	\$809.21	\$75.00
	Median	\$500	\$508	\$450	\$600	\$550	\$500	\$500	\$3,000	\$500	\$450	\$345	\$75

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$23.66	\$25.73	\$21.65	\$15.00	\$26.33	\$19.64	\$26.77	\$36.89
	Median	\$0	\$0	\$0	\$15	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$23.06	\$27.61	\$18.63	\$0.00	\$18.91	\$24.13	\$28.00	\$26.11
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$36.33	\$38.42	\$34.29	\$0.00	\$32.16	\$42.68	\$31.75	\$17.78
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$90.19	\$103.86	\$76.90	\$0.00	\$122.97	\$57.69	\$117.92	\$33.33
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$186.78	\$203.91	\$170.14	\$35.00	\$145.42	\$190.62	\$276.98	\$32.22
	Median	\$0	\$0	\$18	\$35	\$0	\$0	\$15	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$87.01	\$85.65	\$88.33	\$0.00	\$94.76	\$81.89	\$90.88	\$55.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$29.42	\$28.15	\$30.66	\$320.00	\$26.14	\$34.76	\$20.78	\$9.67
	Median	\$0	\$0	\$0	\$320	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$344.25	\$400.59	\$289.17	\$2,630.00	\$375.57	\$323.52	\$299.34	\$364.44
	Median	\$38	\$60	\$30	\$2,630	\$30	\$45	\$35	\$100
TOTAL ON ISLAND	Mean	\$825.27	\$908.09	\$744.30	\$3,000.00	\$838.06	\$788.24	\$892.89	\$576.00
	Median	\$500	\$508	\$450	\$3,000	\$500	\$500	\$500	\$480

On-Island Expenditures

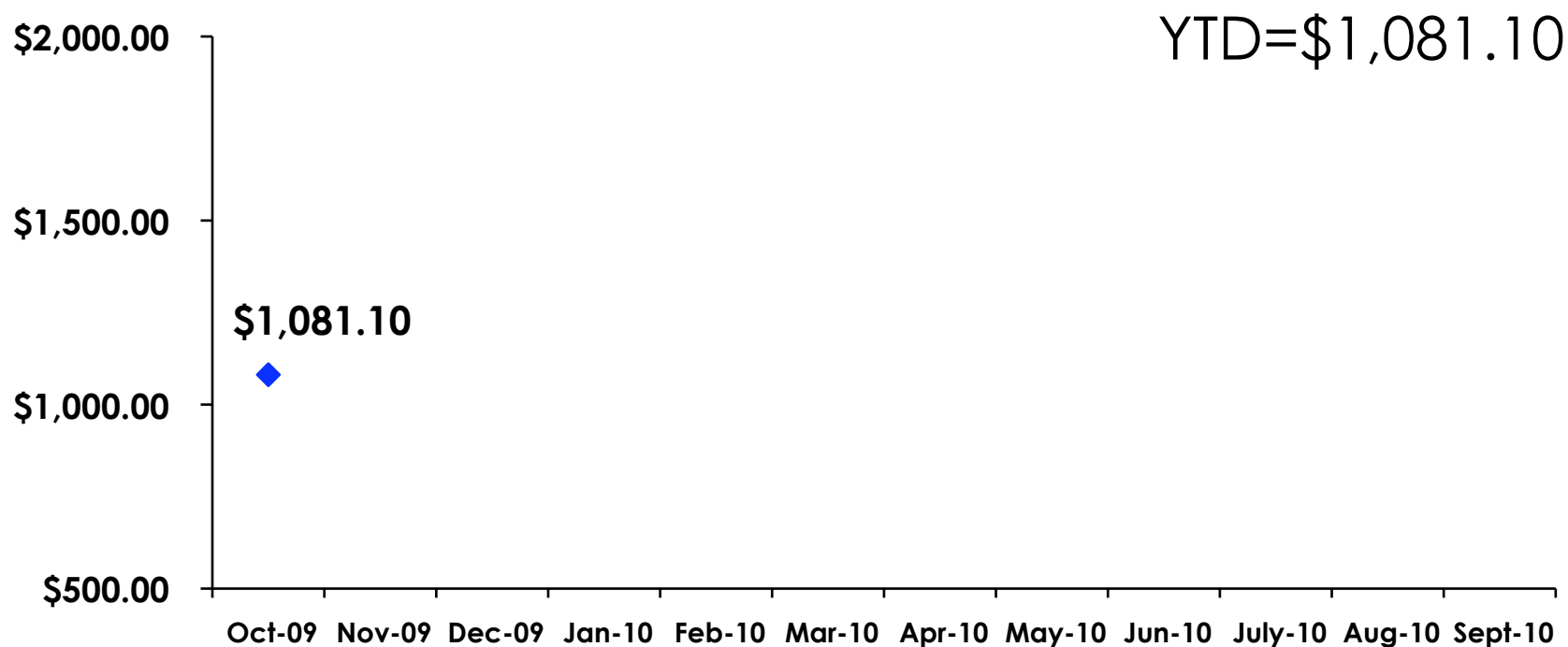
First Timers & Repeaters

		TRIPS TO GUAM	
		1 st	Repeat
F&B-HOTEL	Mean	\$20.05	\$34.60
	Median	\$0	\$0
F&B-FF	Mean	\$17.69	\$39.37
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$29.44	\$57.24
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$96.36	\$71.46
TOUR	Median	\$0	\$0
GIFT/	Mean	\$148.38	\$303.31
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$80.42	\$107.01
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$24.11	\$45.54
	Median	\$0	\$0
OTHER EXP	Mean	\$356.55	\$306.78
	Median	\$30	\$50
TOTAL ON	Mean	\$779.08	\$965.94
ISLAND	Median	\$500	\$587

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,081.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,152 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

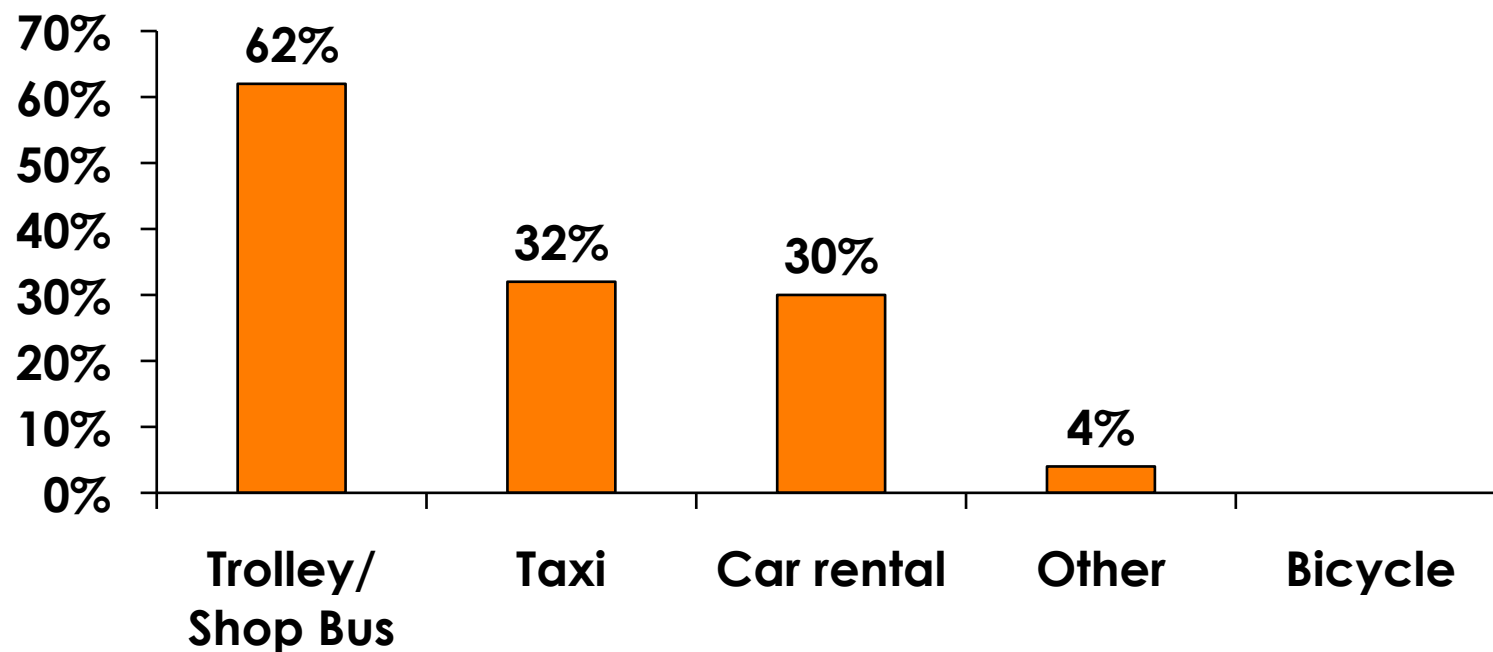


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$23.70
Food & beverage in fast food restaurant/ convenience store	\$23.10
Food & beverage at restaurants or drinking establishments outside a hotel	\$36.30
Optional tours and activities	\$90.20
Gifts/ souvenirs for yourself/companions	\$186.80
Gifts/ souvenirs for friends/family at home	\$87.00
Local transportation	\$29.40
Other expenses not covered	\$344.30
Average Total	\$825.30

Local Transportation

n=115



Guam Airport Expenditures

- \$82.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,600 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

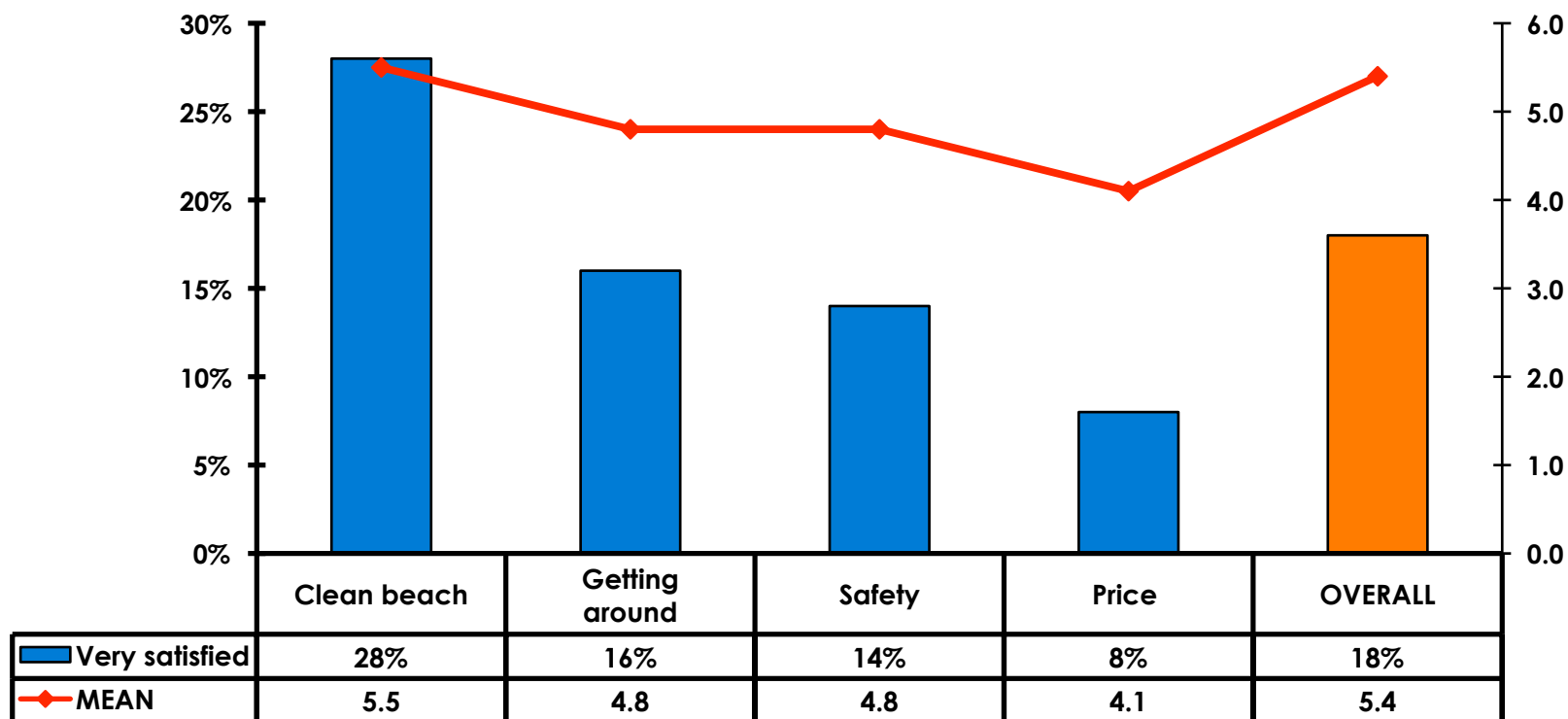
	MEAN \$
Food & Beverages	\$4.60
Gifts/Souvenirs Self	\$35.70
Gifts/Souvenirs Others	\$42.20
Total	\$82.40

SECTION 4 **VISITOR SATISFACTION**

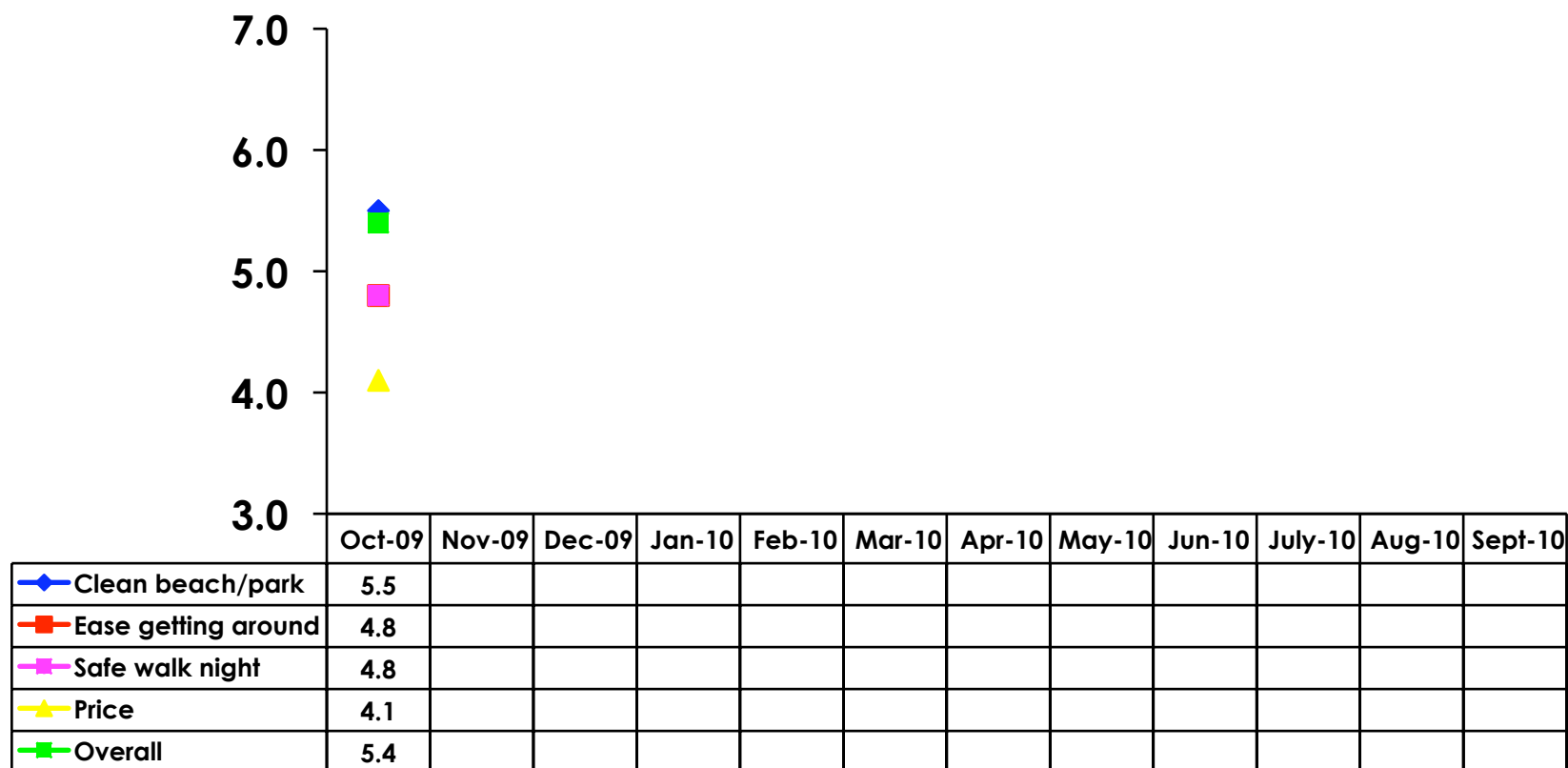
Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



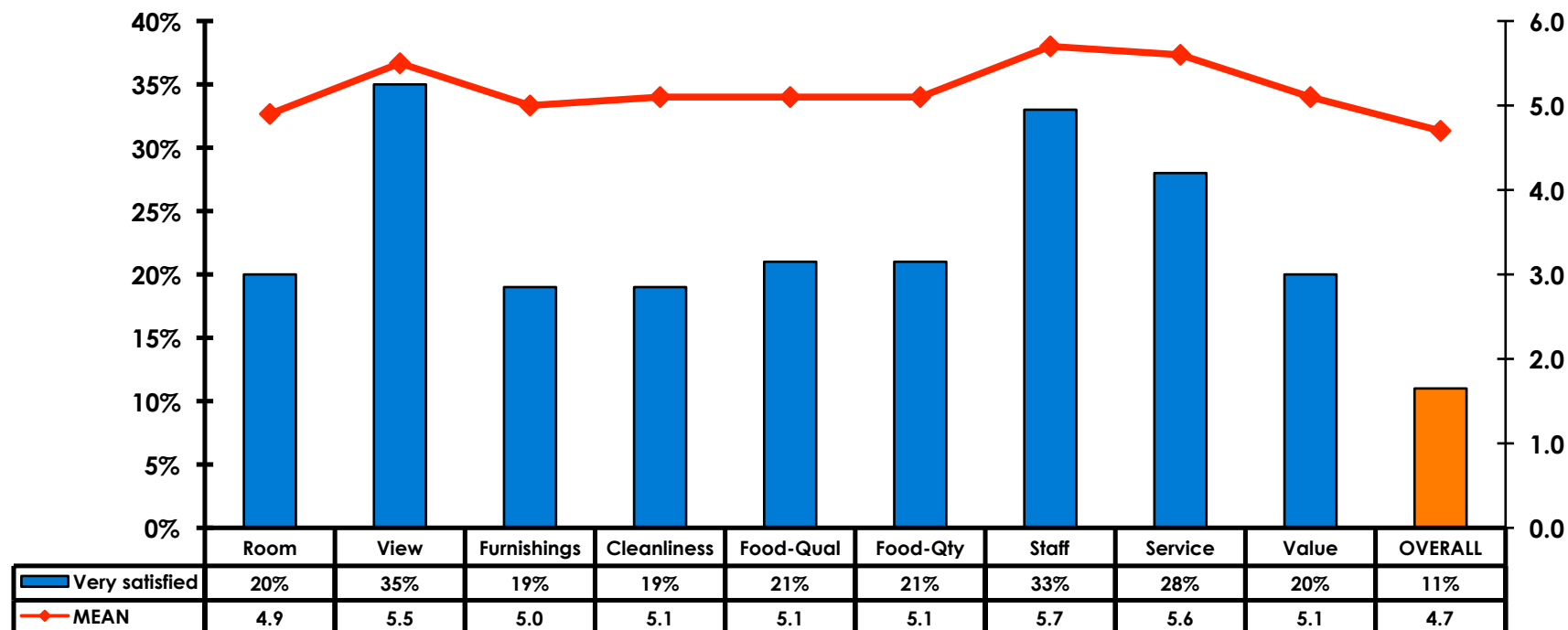
Guam Perceptions



Quality of Accommodations

7pt Rating Scale

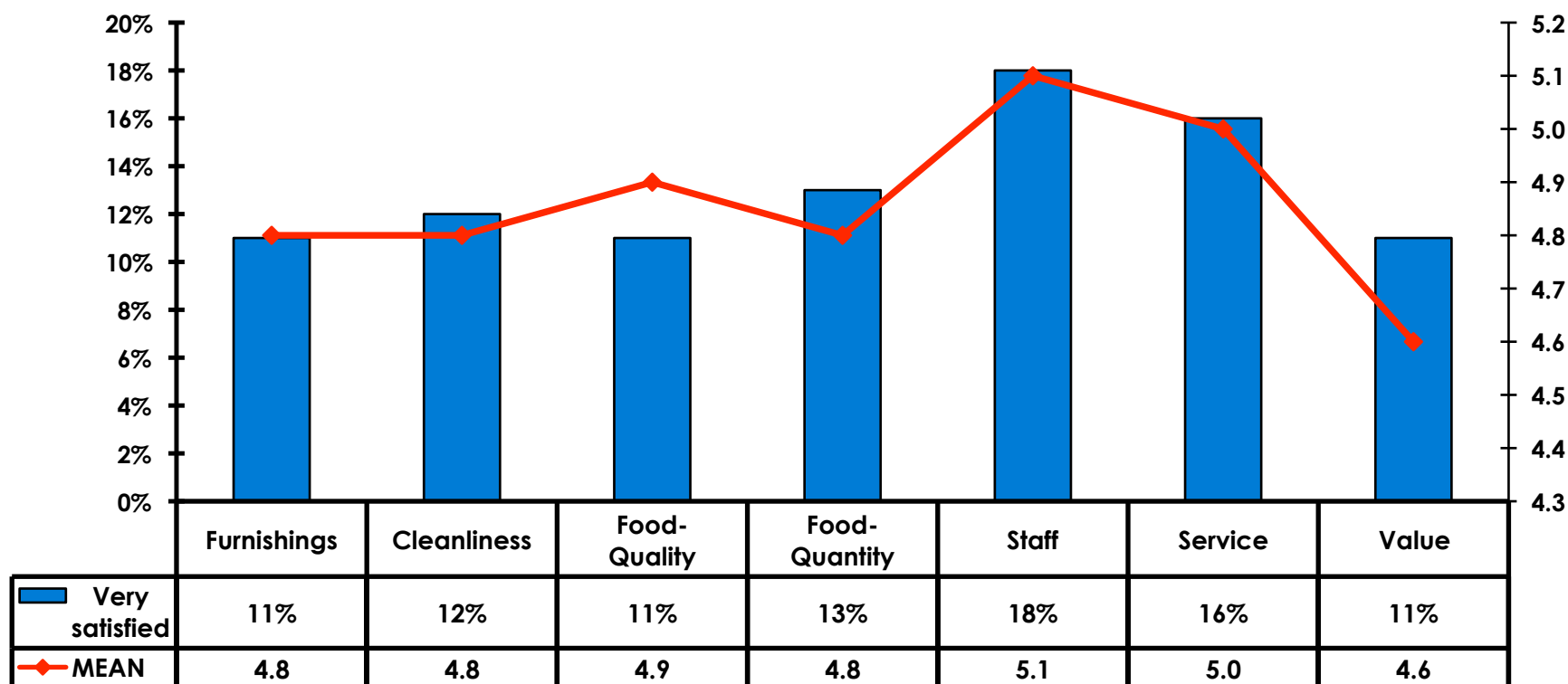
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

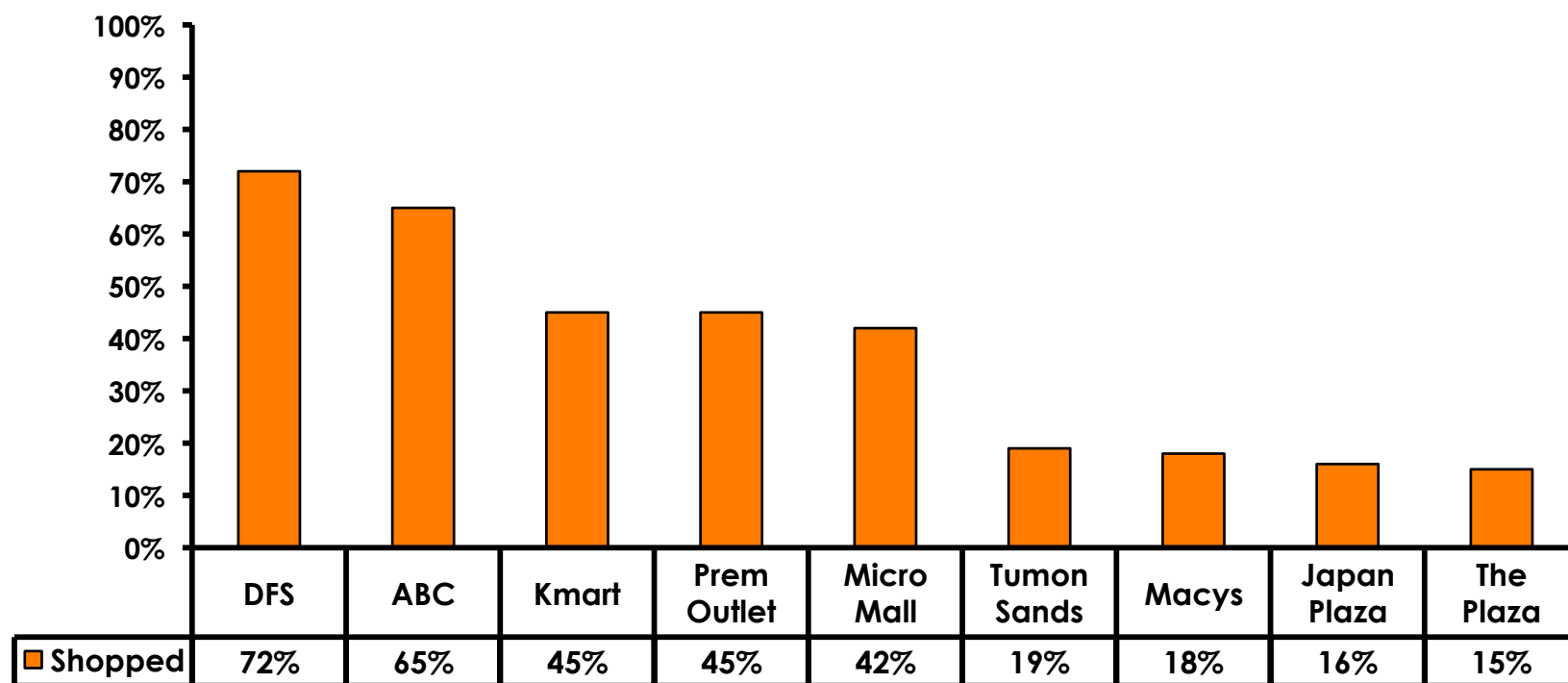
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

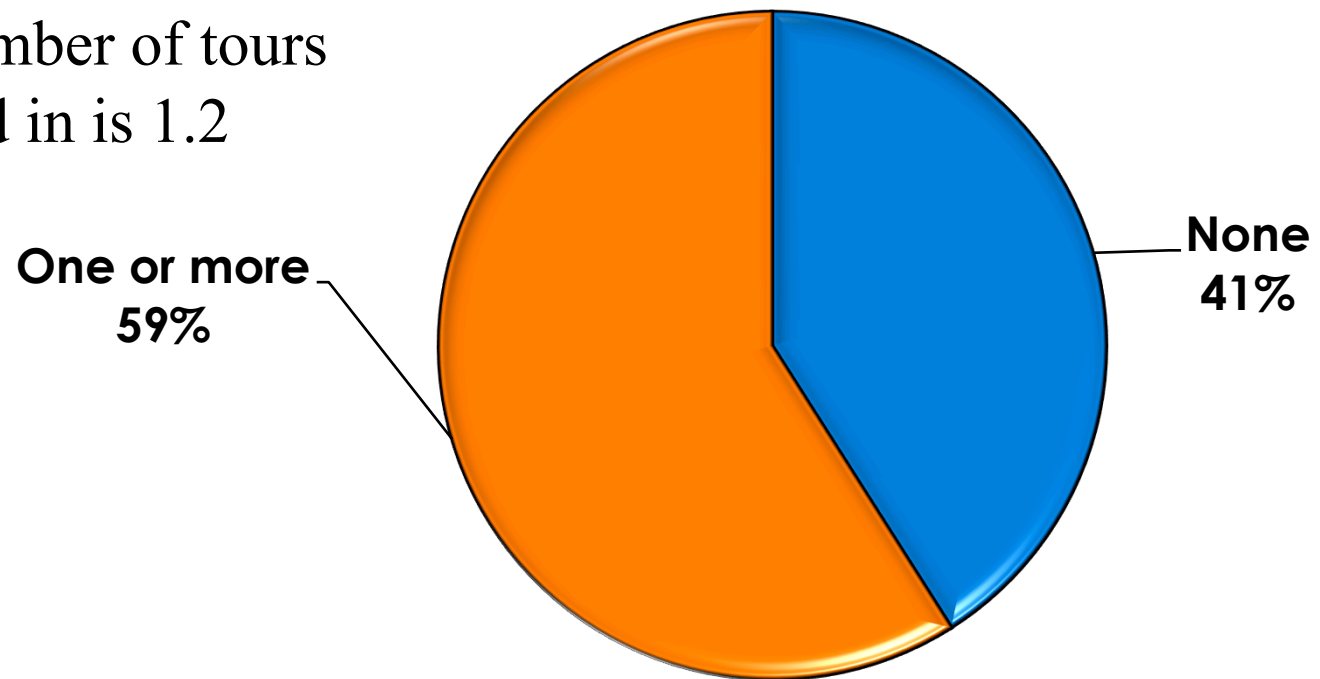
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 38%	Score of 6 to 7 = 33%
Score of 4 to 5 = 49%	Score of 4 to 5 = 46%
Score 1 to 3 = 13%	Score 1 to 3 = 21%
MEAN = 4.9	MEAN = 4.6

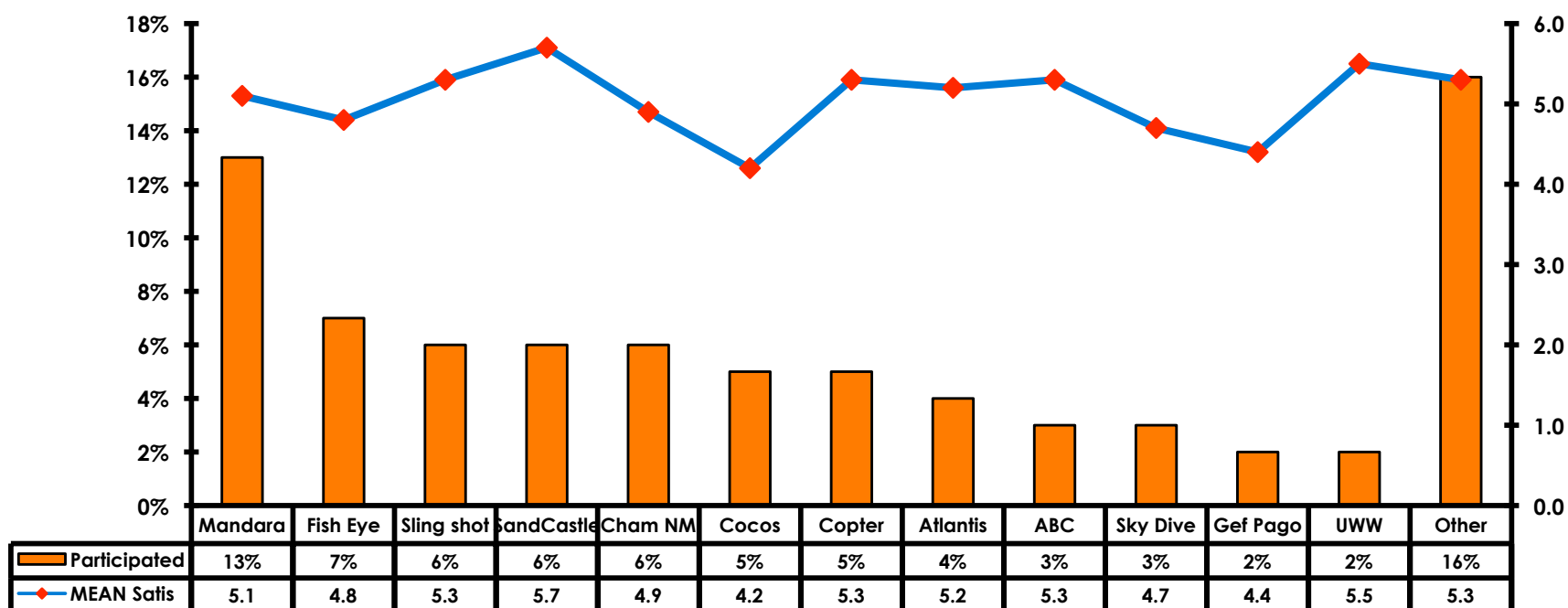
Optional Tour Participation

- Average number of tours participated in is 1.2



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 = 33%	Score of 6 to 7 = 28%
Score of 4 to 5 = 58%	Score of 4 to 5 = 56%
Score 1 to 3 = 9%	Score 1 to 3 = 15%
MEAN = 4.9	MEAN = 4.6

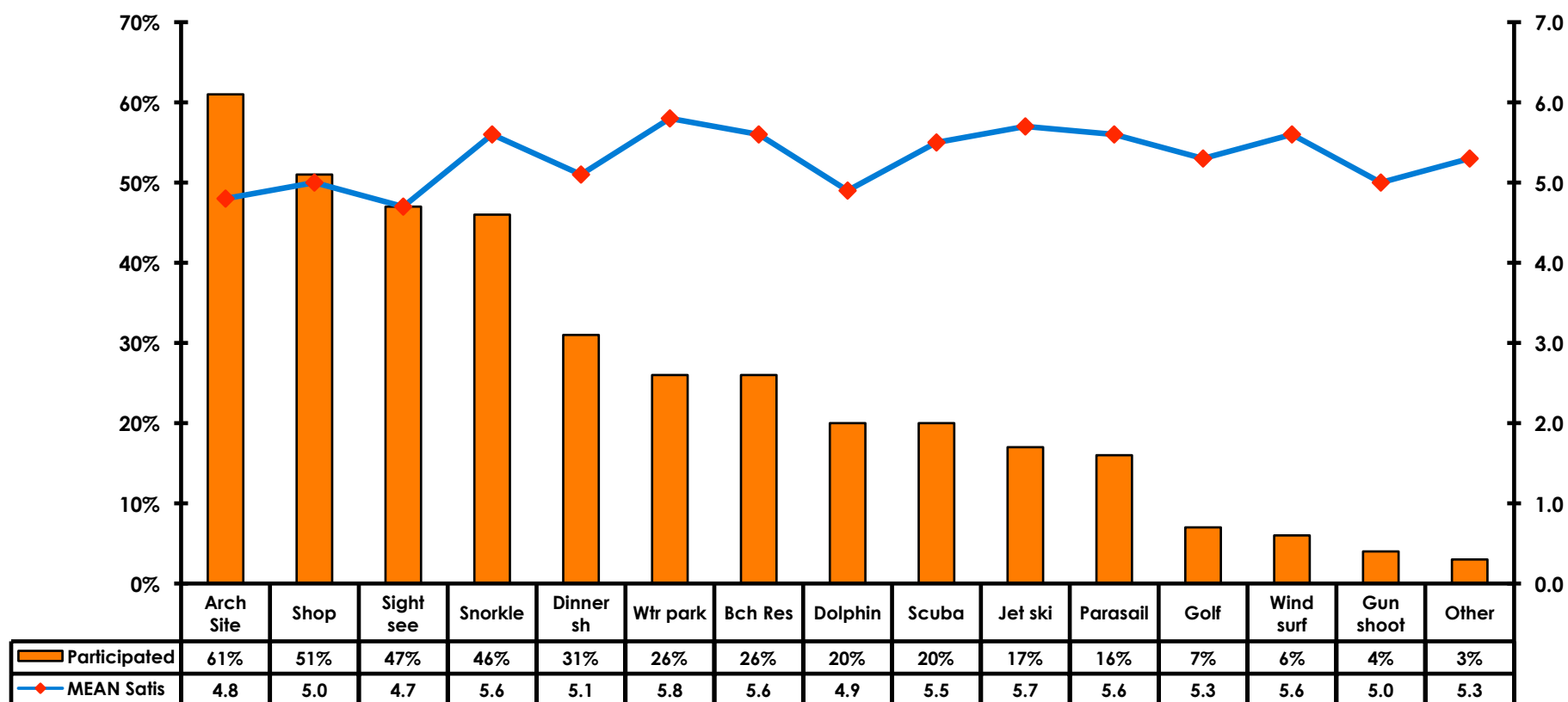
Night Tours Satisfaction

7pt Rating Scale

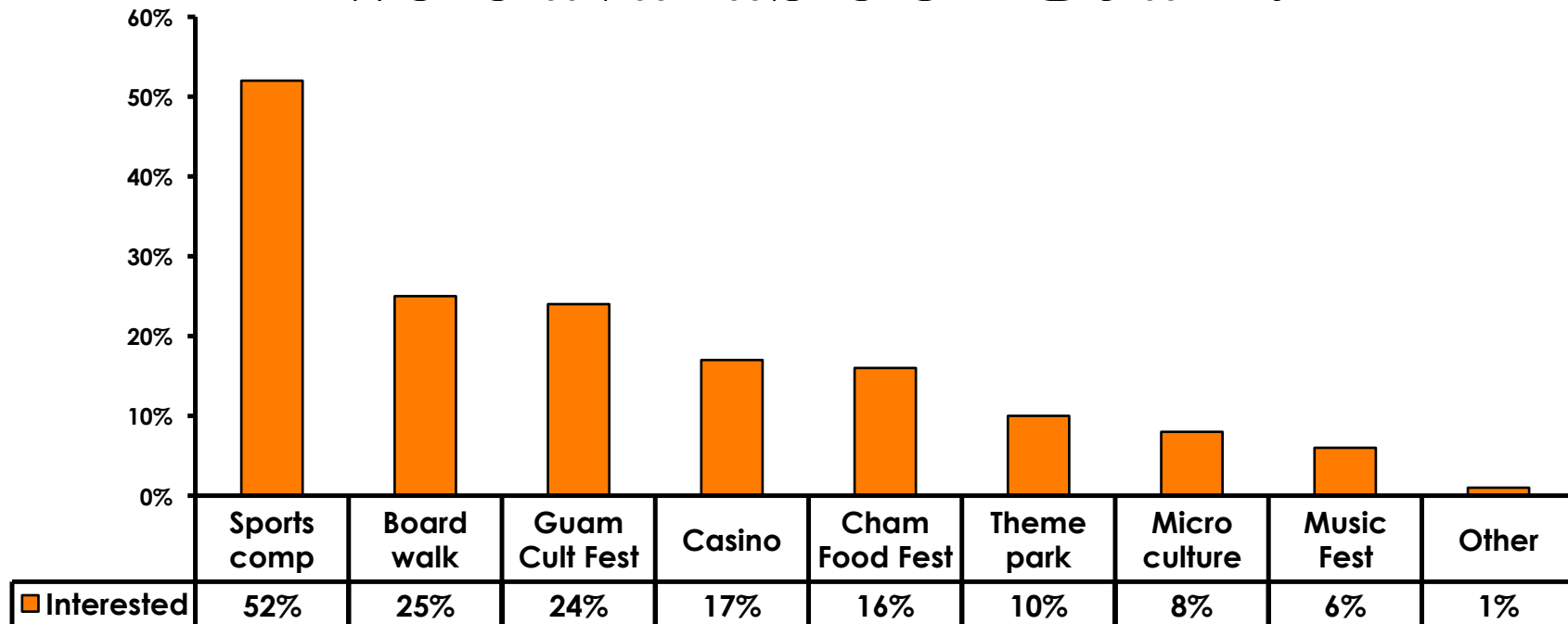
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 20%	Score of 6 to 7 = 19%
Score of 4 to 5 = 62%	Score of 4 to 5 = 58%
Score 1 to 3 = 18%	Score 1 to 3 = 22%
MEAN = 4.4	MEAN = 4.2

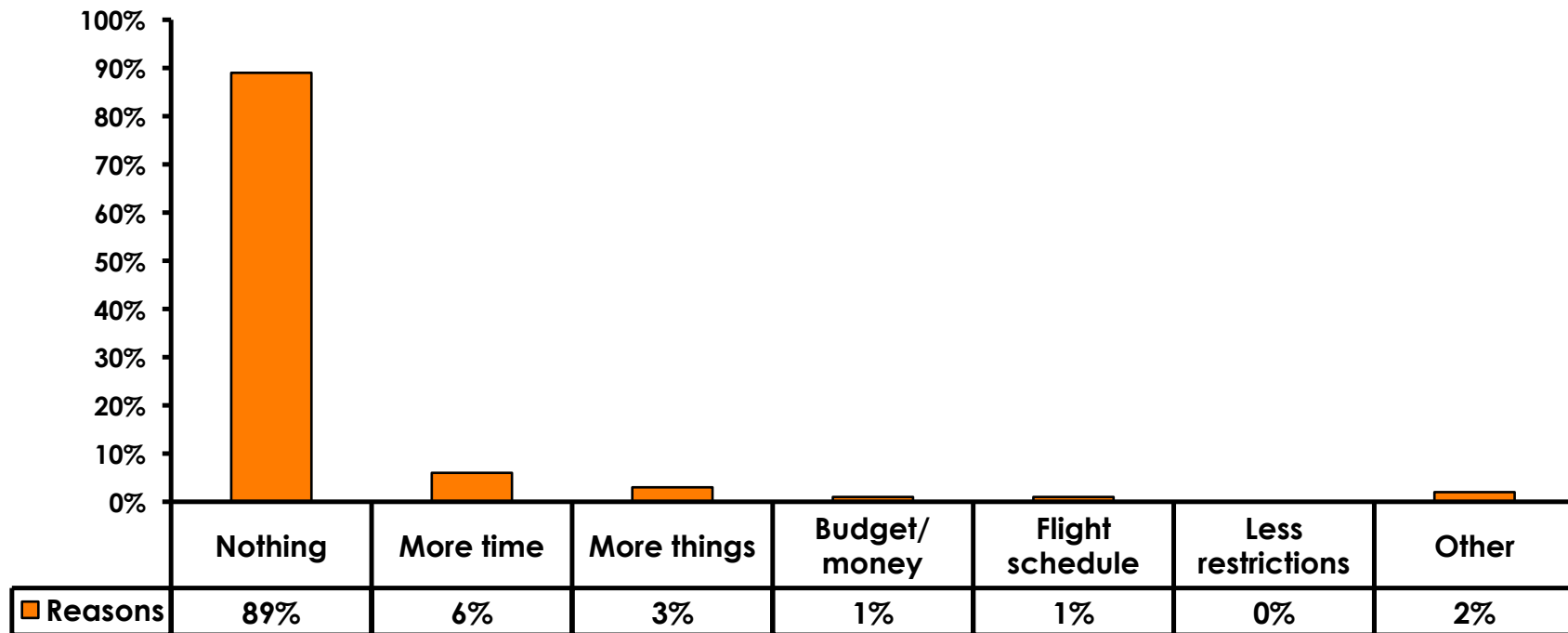
Satisfaction with Other Activities



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



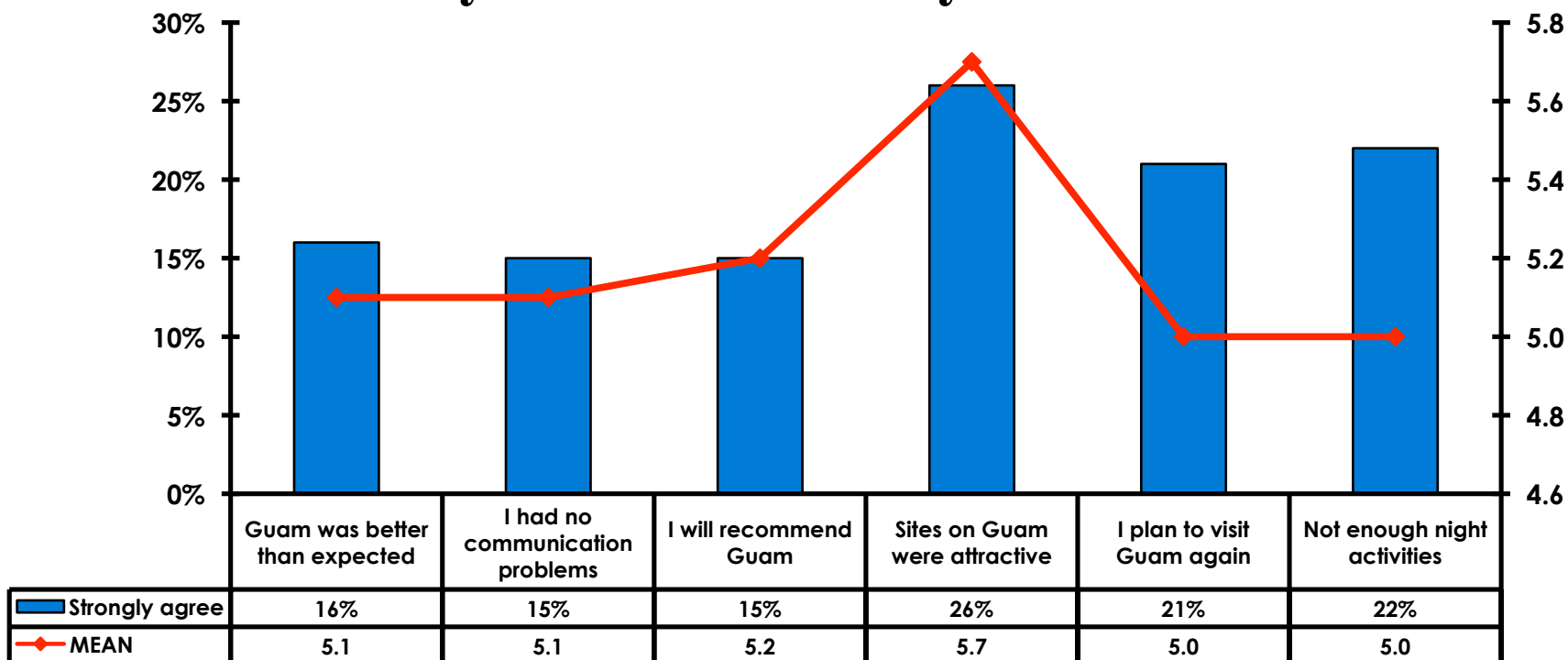
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

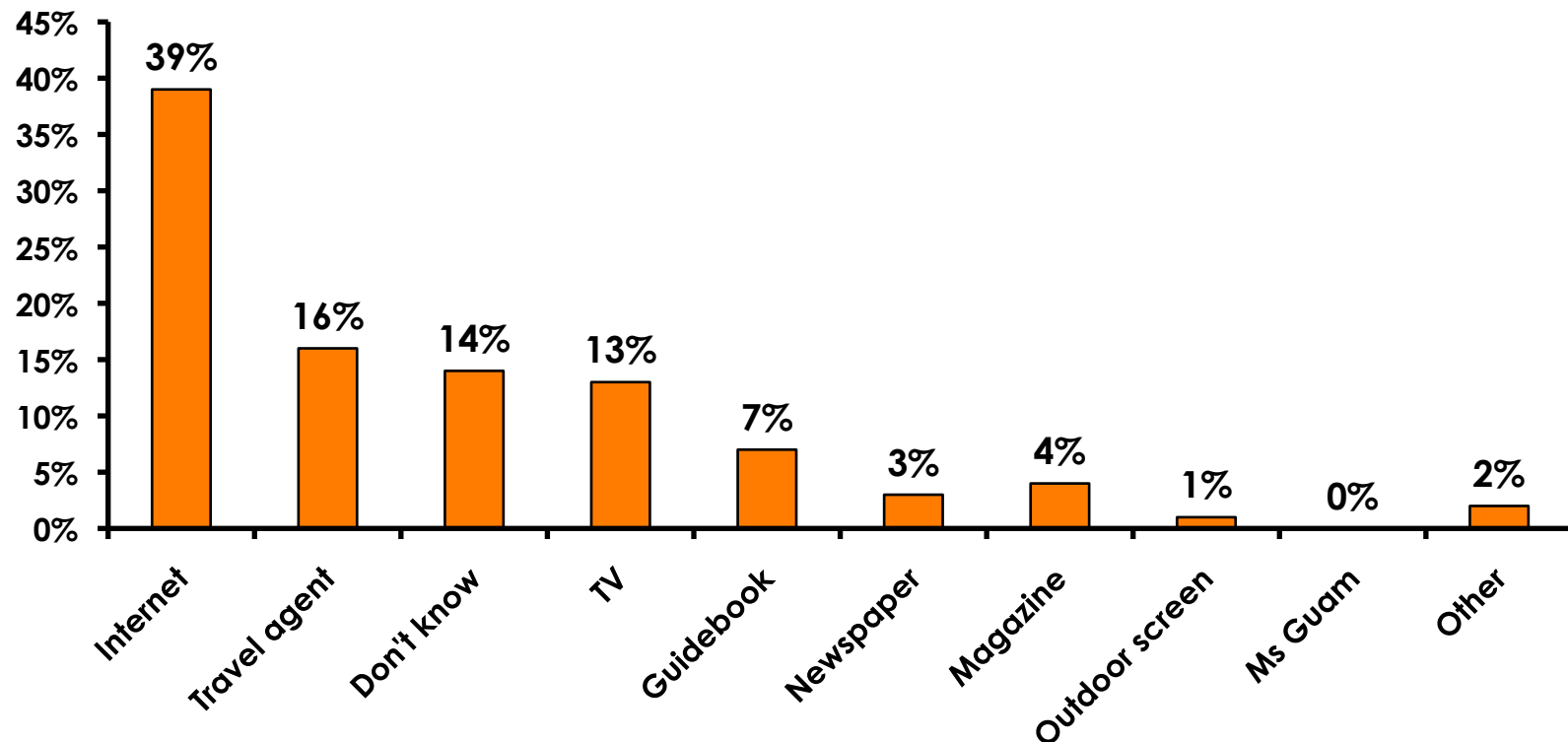
7=Very Satisfied/ 1=Very Dissatisfied



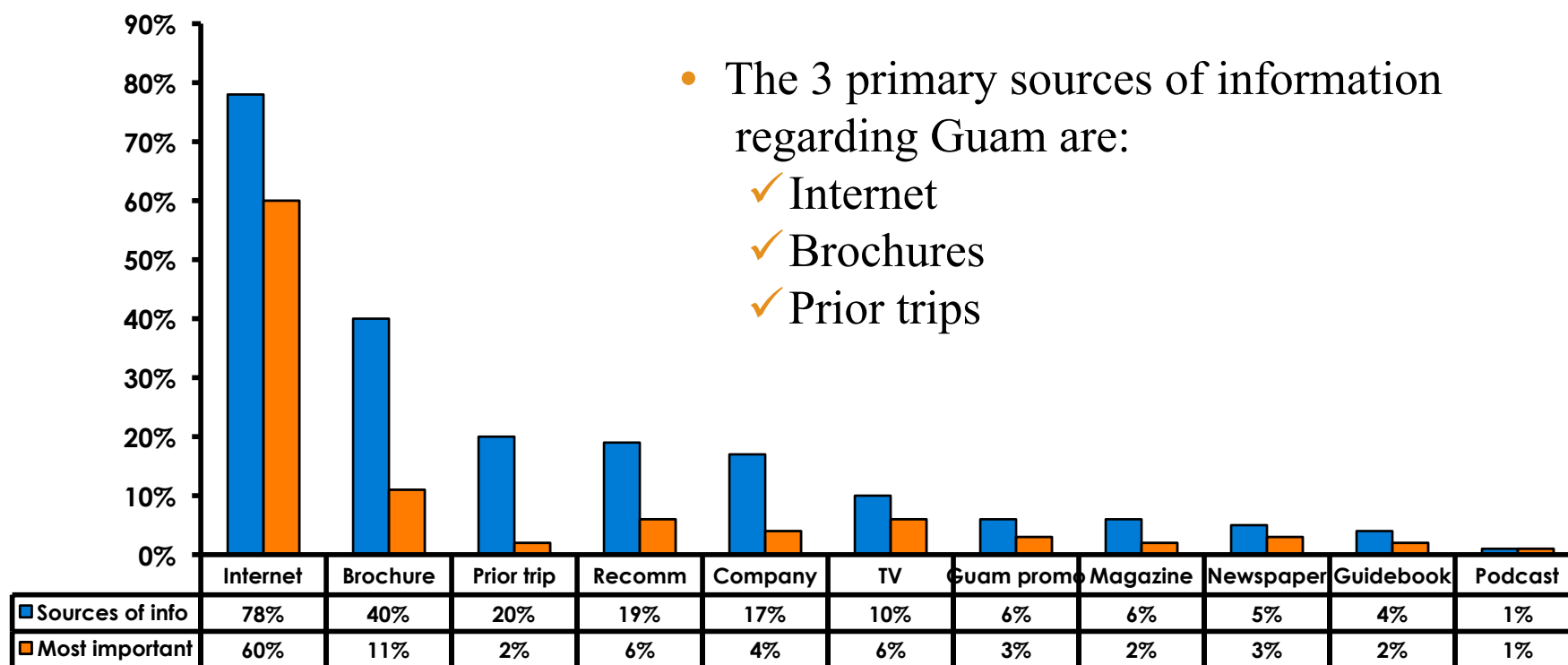
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

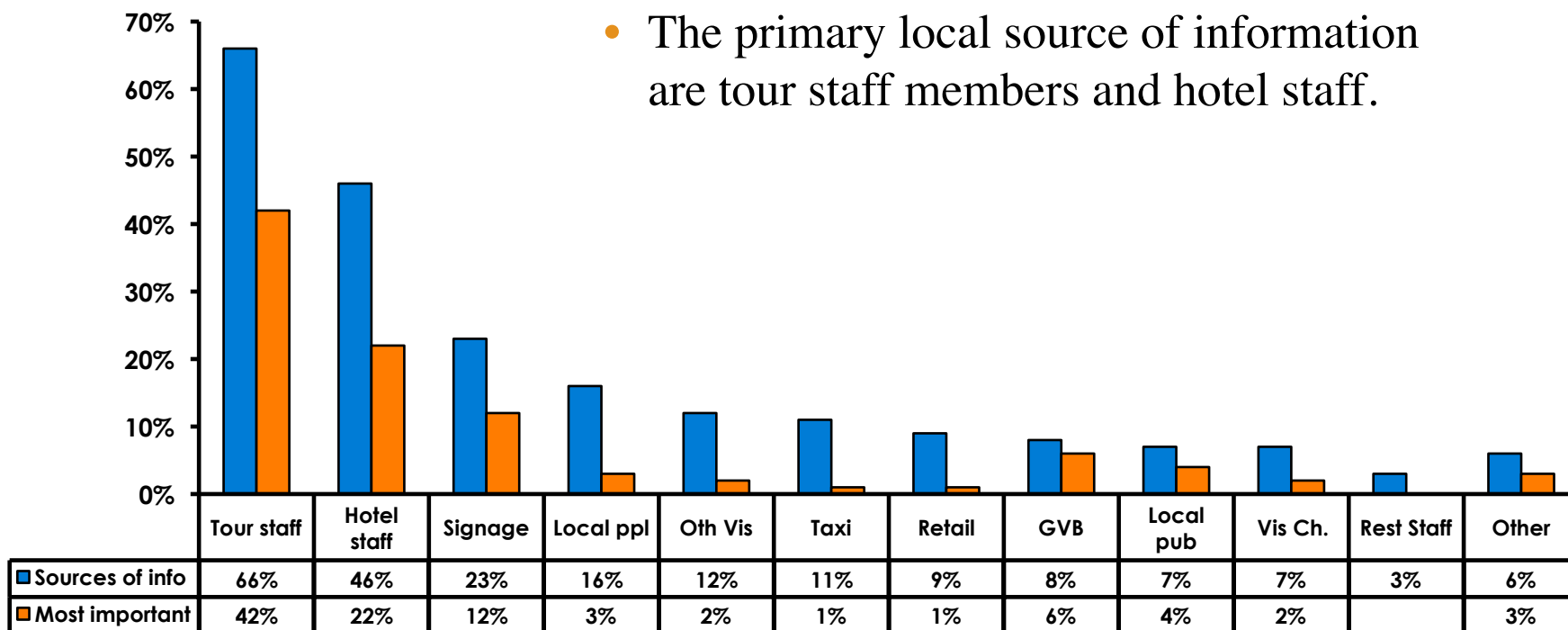


Sources of Information Pre-arrival



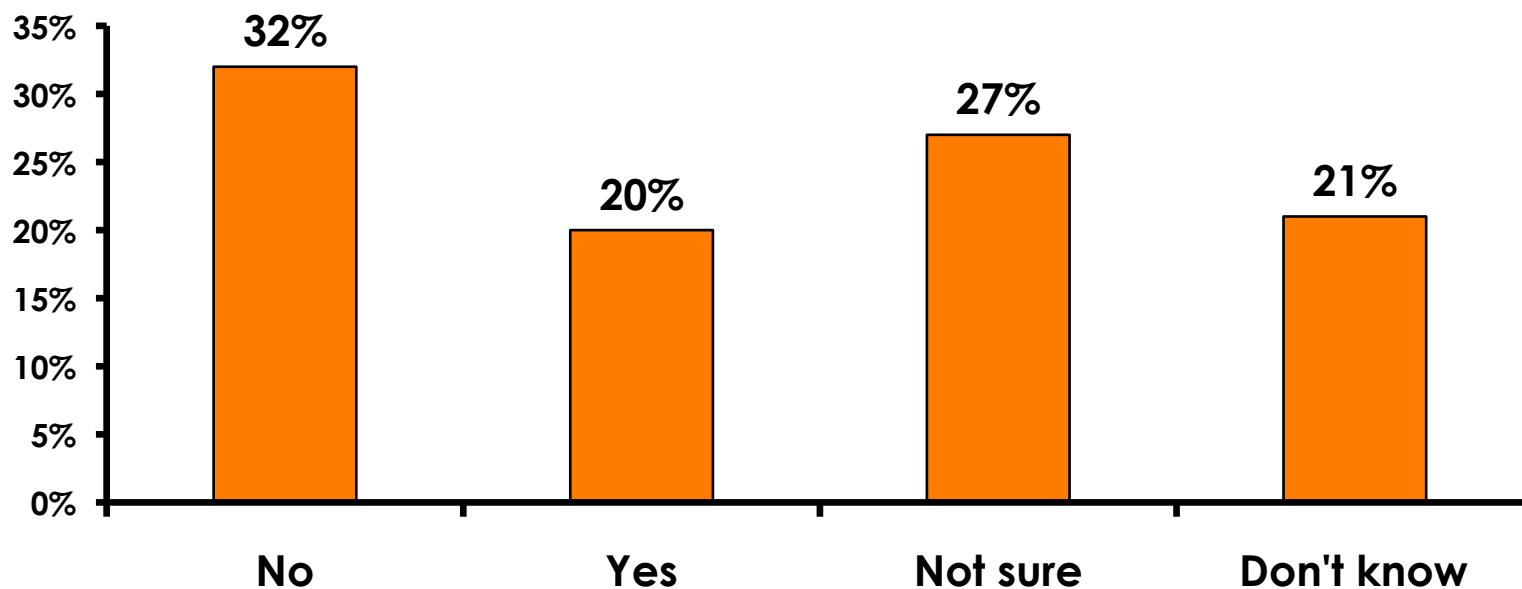
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

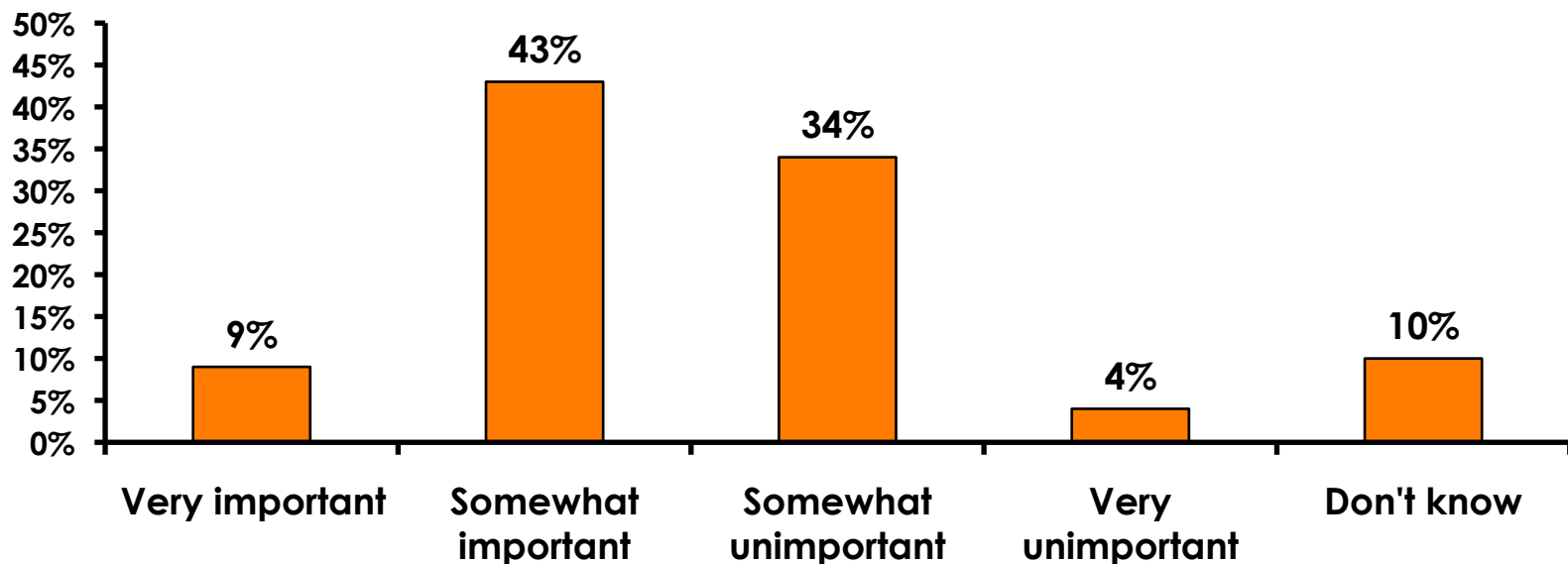
Good time to spend money on travel outside of Korea - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No		28%	36%	28%	44%	25%	33%	34%	32%	10%
	Yes	100%	28%	15%	18%	11%	36%	18%	18%	20%	20%
	Not sure		23%	29%	31%	22%	22%	26%	27%	28%	50%
	Do not know		22%	20%	23%	22%	17%	23%	20%	20%	20%
Total	Count	1	119	158	65	9	36	120	93	85	10

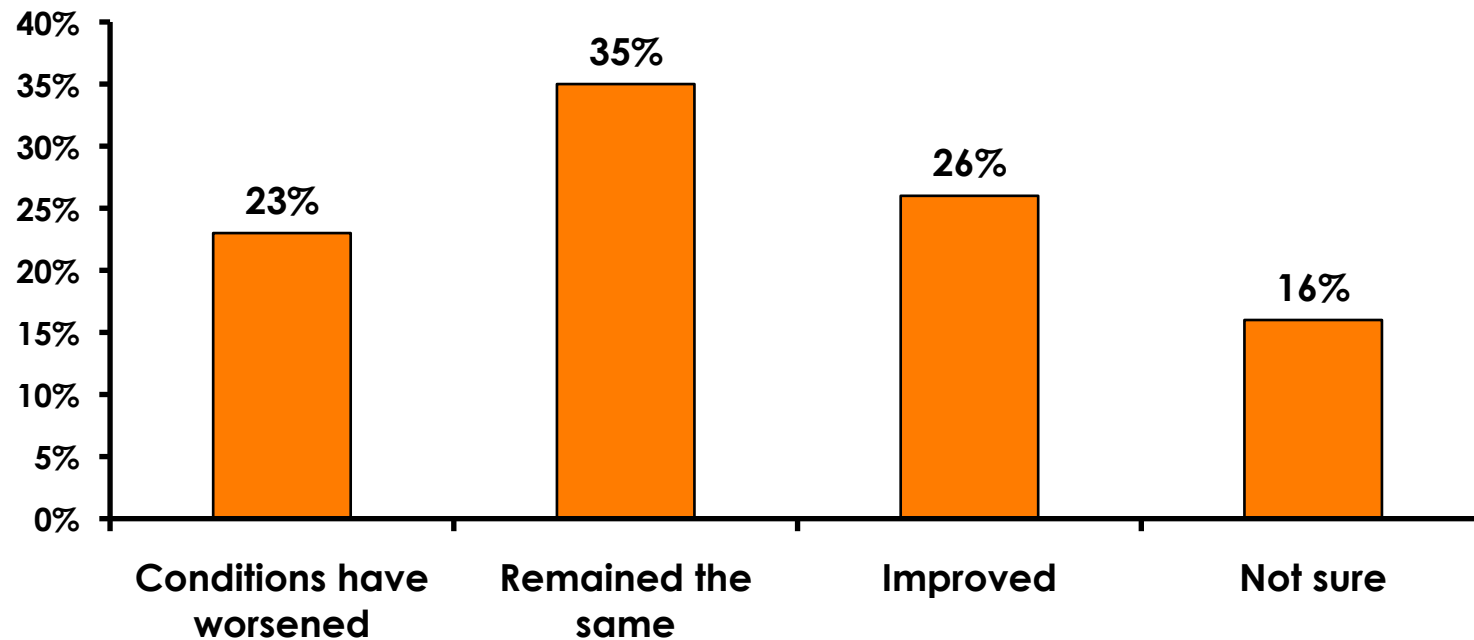
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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

		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%		6%	4%	2%	5%	
	Somewhat unimportant		30%	41%	25%	44%	28%	34%	37%	35%	40%
	Somewhat important		43%	41%	54%	22%	42%	35%	51%	47%	50%
	Very important		9%	8%	9%	33%	3%	13%	4%	11%	10%
	Don't know	100%	13%	7%	11%		22%	14%	6%	2%	
Total	Count	1	119	158	65	9	36	120	93	85	10

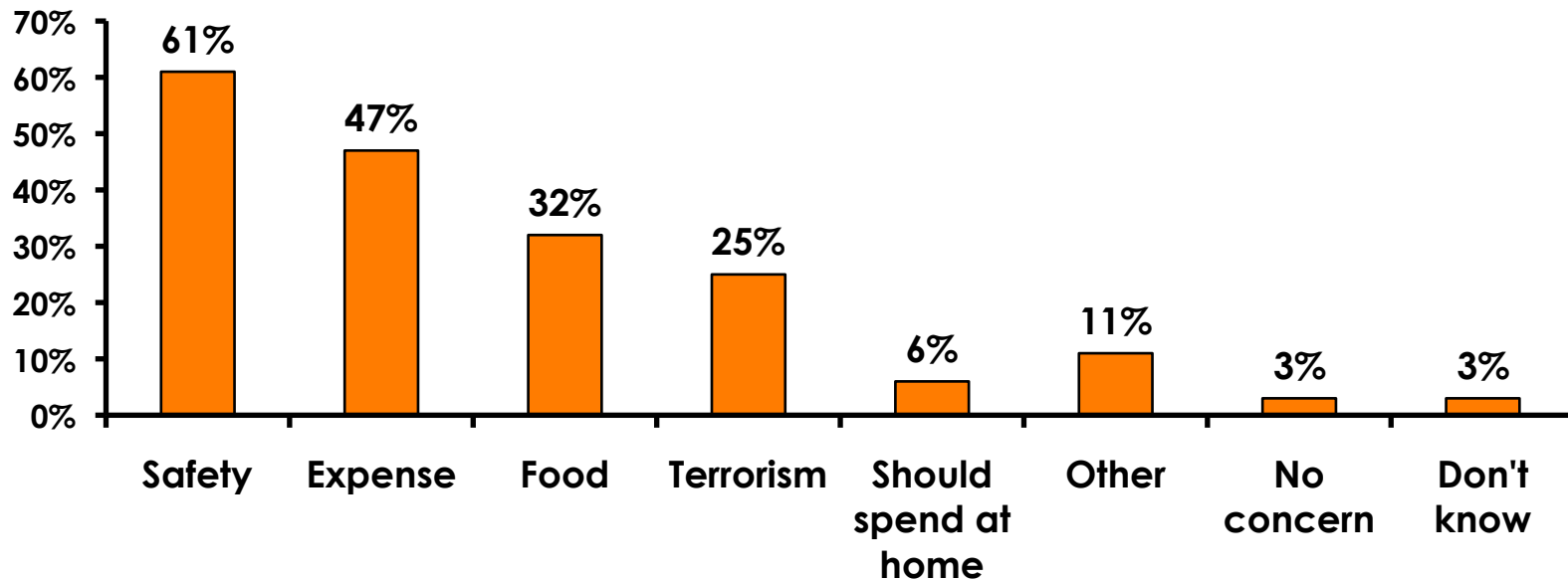
Rating Korean Economy Compared to 12 months ago



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		26%	16%	32%	44%	28%	22%	27%	16%	30%
	Conditions have remained the same		29%	42%	29%	22%	36%	37%	38%	27%	40%
	Conditions have improved		24%	27%	31%		22%	18%	26%	42%	10%
	Do not know	100%	21%	14%	8%	33%	14%	23%	10%	14%	20%
Total	Count	1	119	158	65	9	36	120	93	85	10

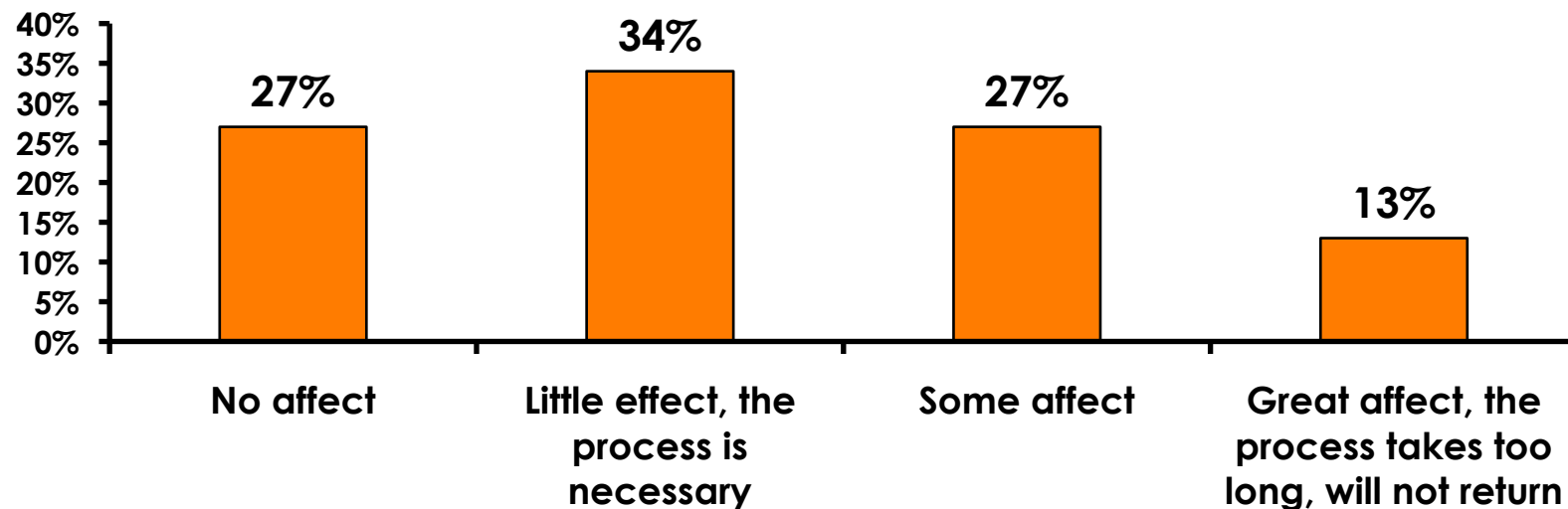
Concerns about travel outside of Korea - Overall



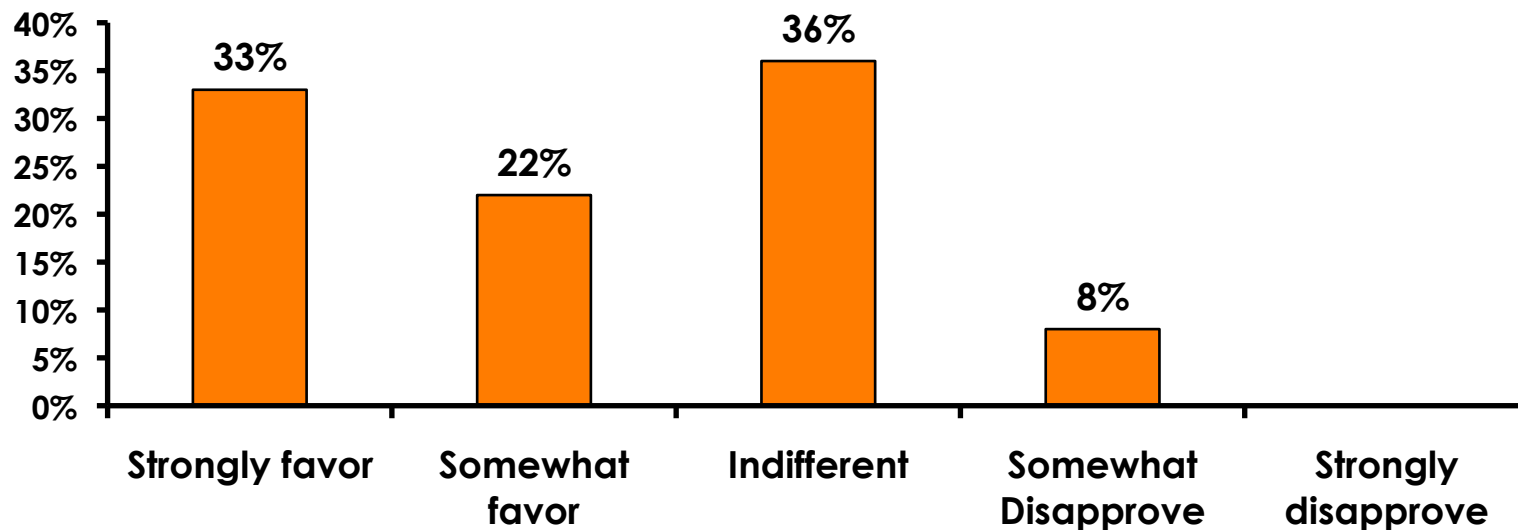
Concerns about travel outside of Korea - By Age & Income

		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		58%	63%	62%	56%	58%	54%	69%	64%	30%
	Expense		45%	46%	49%	56%	39%	49%	44%	49%	50%
	Food		28%	33%	34%	44%	25%	28%	34%	34%	30%
	Terrorism		21%	30%	23%	11%	25%	20%	30%	28%	20%
	Other		16%	9%	9%	11%	25%	8%	8%	14%	30%
	Spending money abroad when it should be spent at home		6%	6%	8%		8%	10%	3%	2%	10%
	Do not know	100%	2%	4%	3%		6%	5%	2%	2%	
	No concerns		4%	3%	2%			3%	3%	6%	
Total	Cases	1	119	158	65	9	36	120	93	85	10

Security Screening/ Immigration Process at Guam International Airport



Increase Drinking Age to 21



Increase Drinking Age to 21 by Gender & Age

		AGE					GENDER	
		<20	20-29	30-39	40-49	50+	Male	Female
Q.28	Strongly Favor		28%	34%	42%	33%	35%	32%
	Somewhat favor		22%	24%	18%	11%	25%	19%
	Indifferent		42%	35%	29%	56%	32%	40%
	Somewhat disapprove	100%	8%	7%	11%		8%	9%
Total	Count	1	118	158	65	9	173	173

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) – **8%**
- Neutral (Score 4-5) – **41%**
- Disagree (Score 1-3) – **51%**

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

