



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

OCTOBER 2010



Prepared by: QMark Research

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Background & Methodology

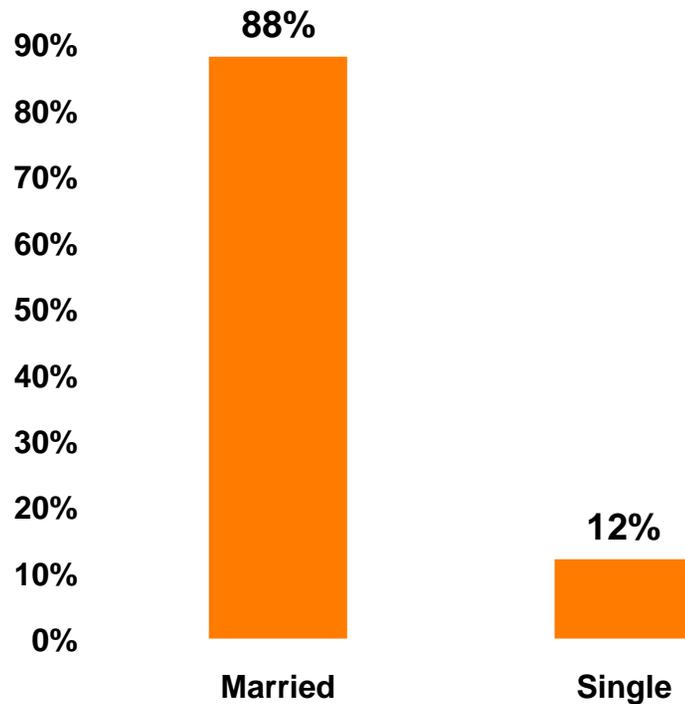
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **353** departing Korean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

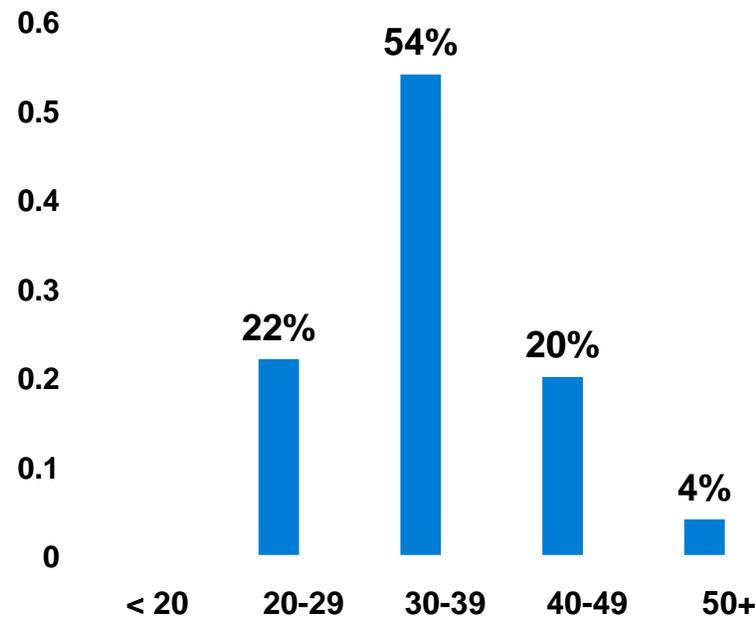


- A majority of visitors are married.

Marital Status Tracking

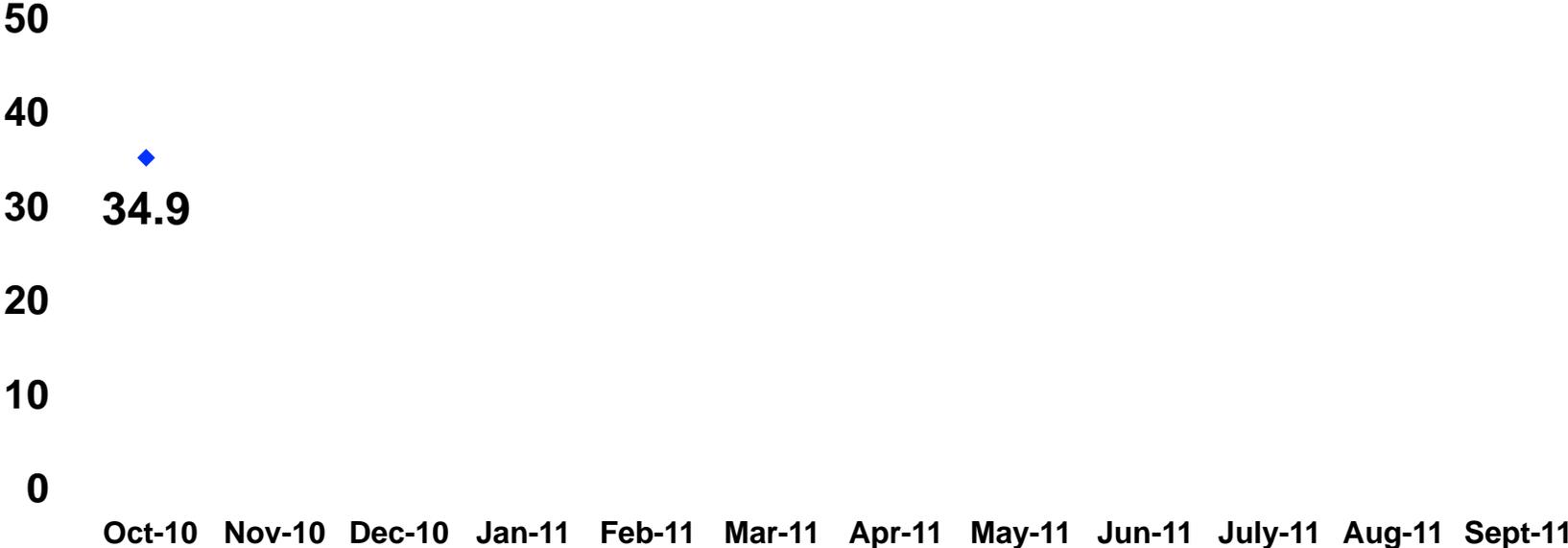


Age - Overall

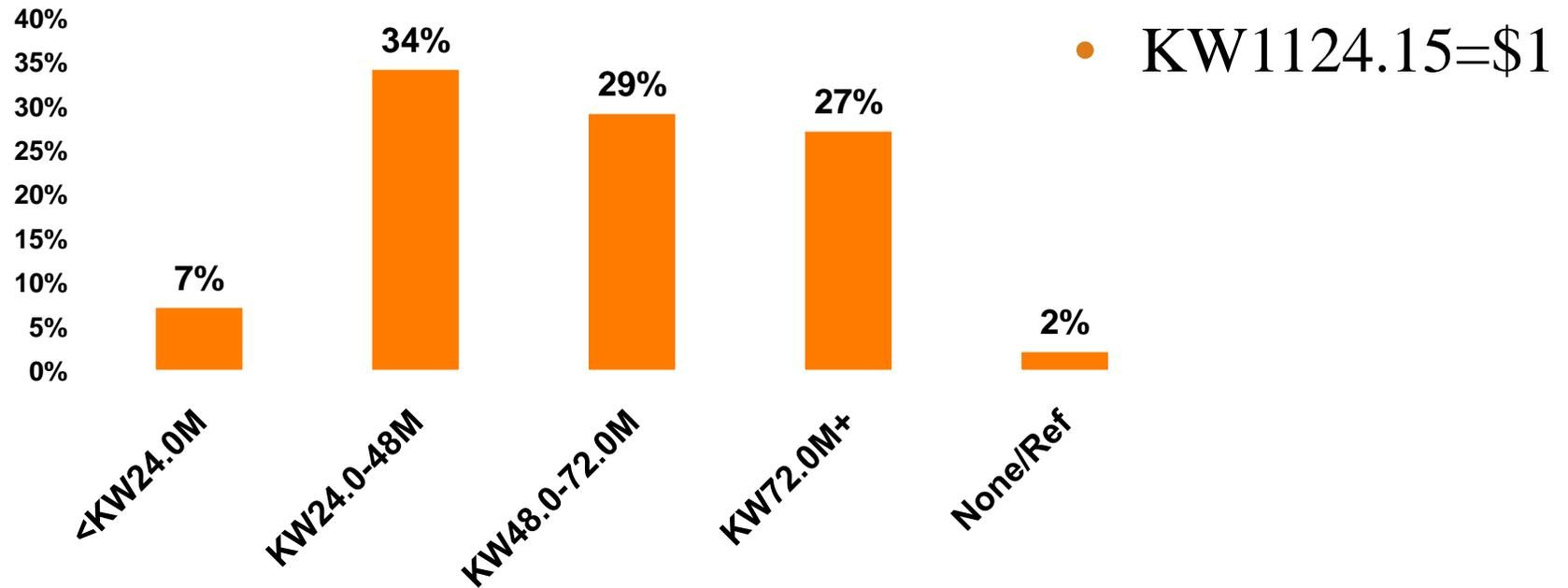


- The average age of the respondents is 34.9 years of age.

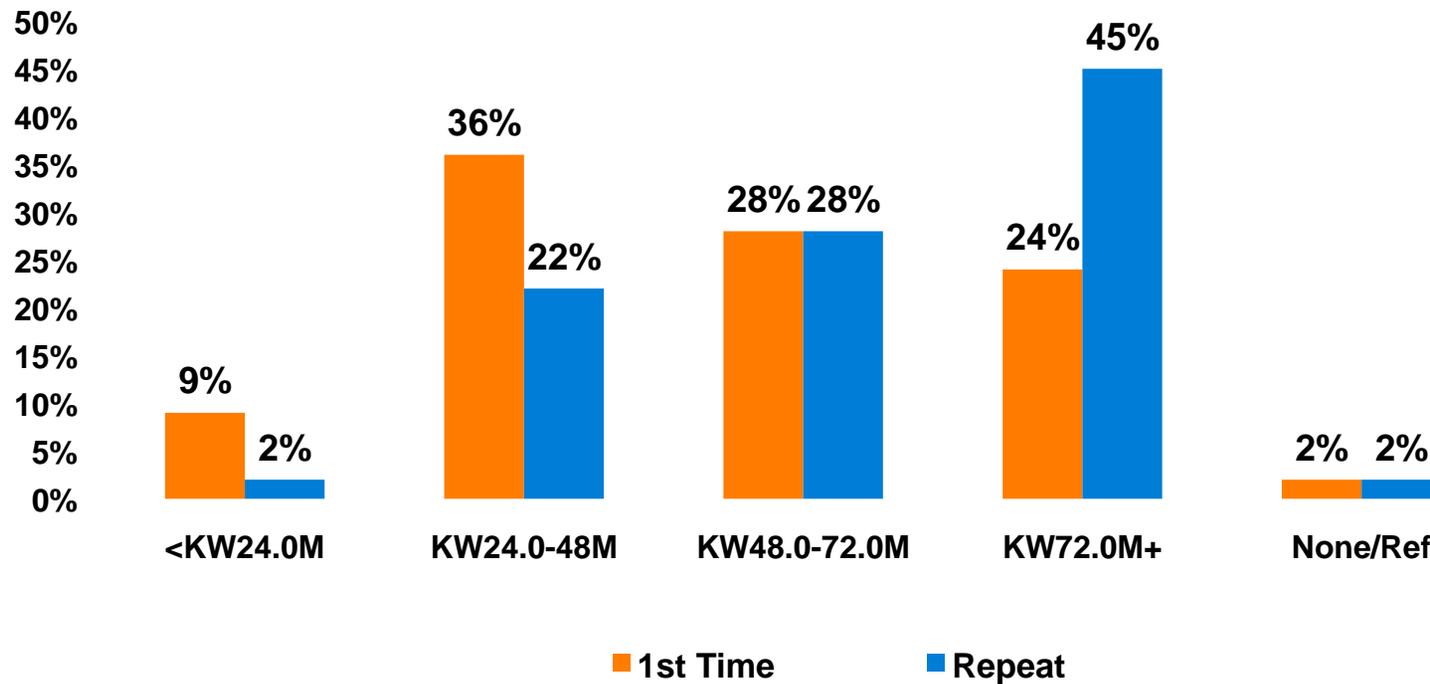
Average Age Tracking



Personal Income



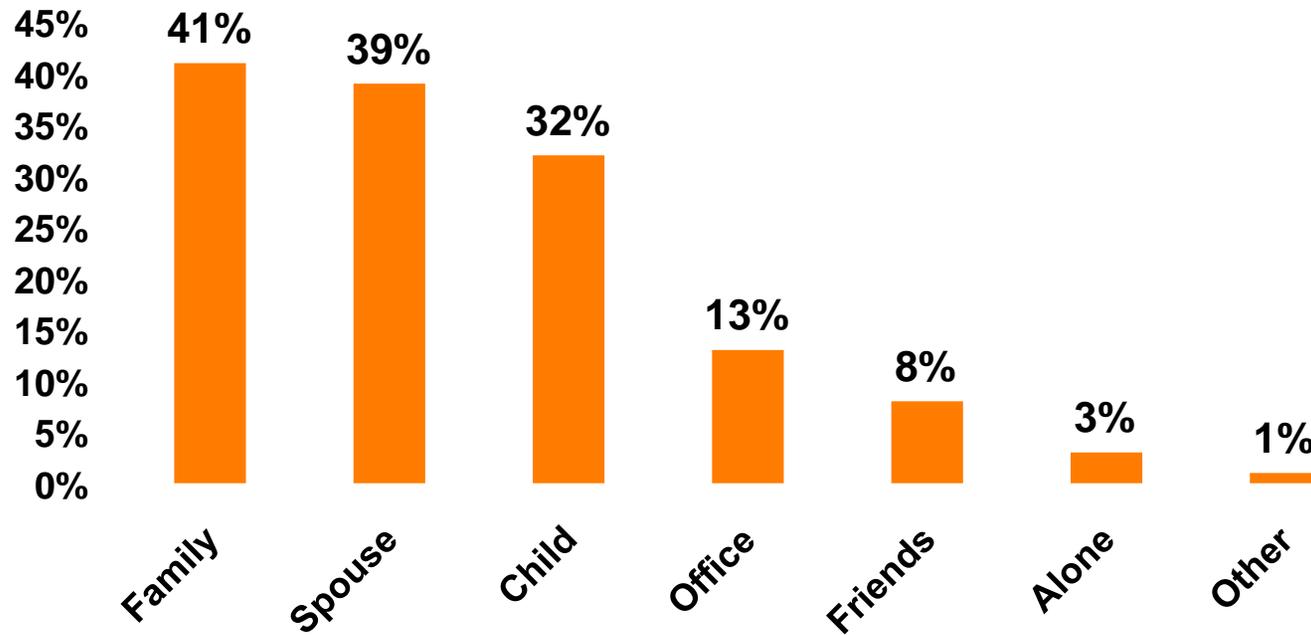
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	26	9	17	11	12	1	2
			8%	5%	10%	15%	6%	1%	15%
	KW24.0M-KW48.0M	Count	118	67	51	38	64	11	5
			34%	39%	30%	52%	34%	15%	38%
	KW48.0M-KW72.0M	Count	97	46	51	13	59	23	2
			28%	27%	30%	18%	32%	32%	15%
	KW72.0M+	Count	94	49	45	6	49	35	4
			27%	28%	26%	8%	26%	49%	31%
	Refused	Count	8	2	6	5	2	1	
			2%	1%	4%	7%	1%	1%	
Total	Count		343	173	170	73	186	71	13

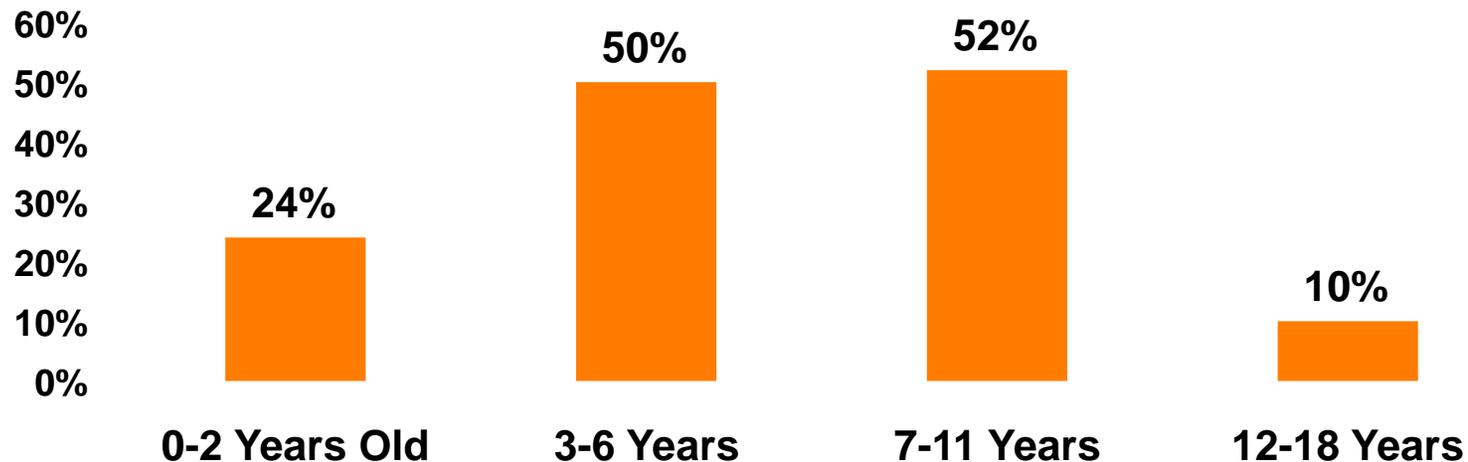
Travel Companions



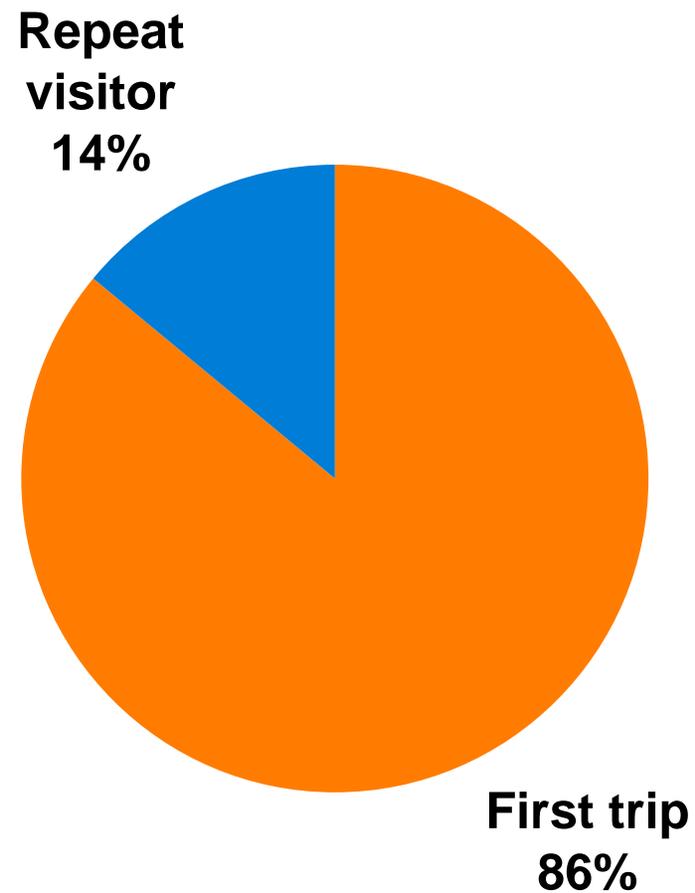
Number of Children Travel Party

N=112 total respondents traveling with children.

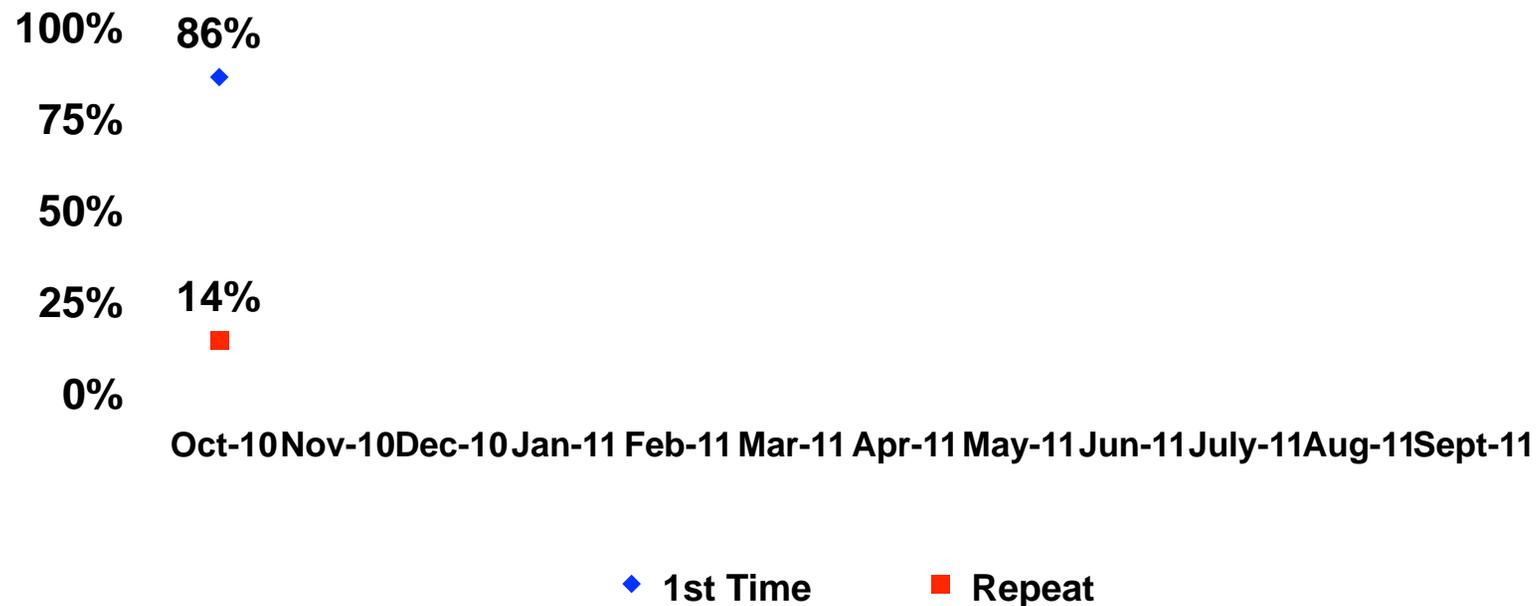
(Of those N=112 respondents, there is a total of 182 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam Tracking



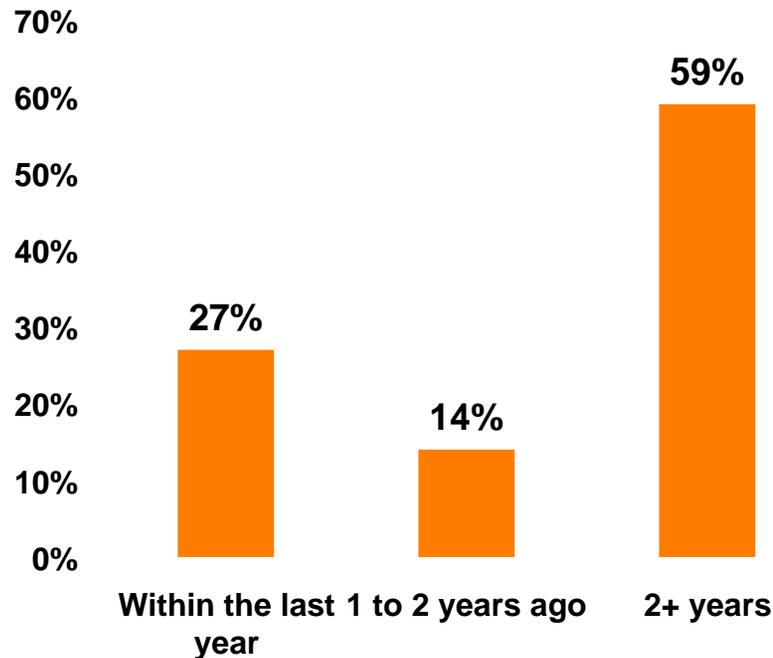
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	176	155	21
			50%	51%	41%
	Female	Count	177	147	30
			50%	49%	59%
Total		Count	353	302	51
AGE	20-29	Count	76	72	4
			22%	24%	8%
	30-39	Count	192	169	23
			54%	56%	45%
	40-49	Count	72	49	23
		20%	16%	45%	
	50+	Count	13	12	1
			4%	4%	2%
Total		Count	353	302	51

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

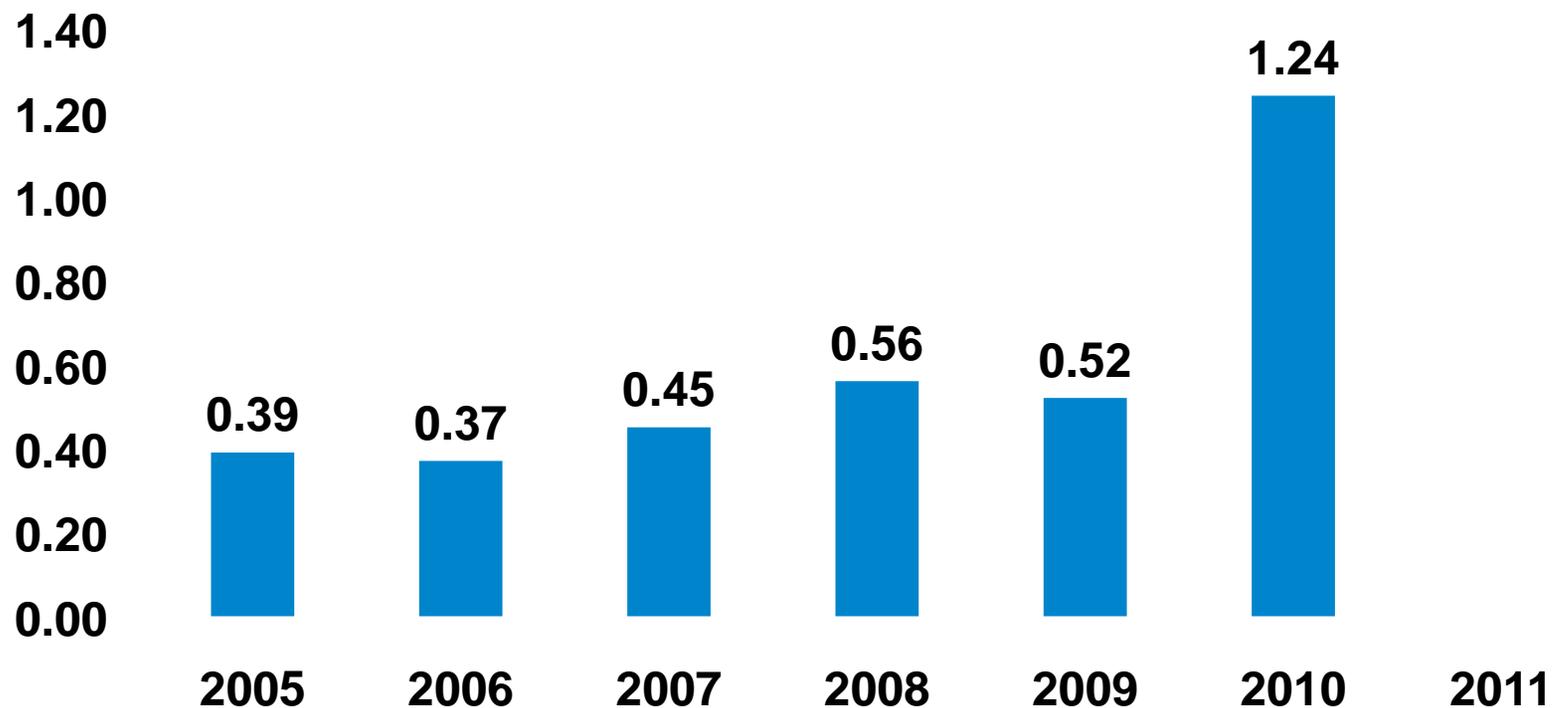
Repeat Visitors Last Trip

n = 51

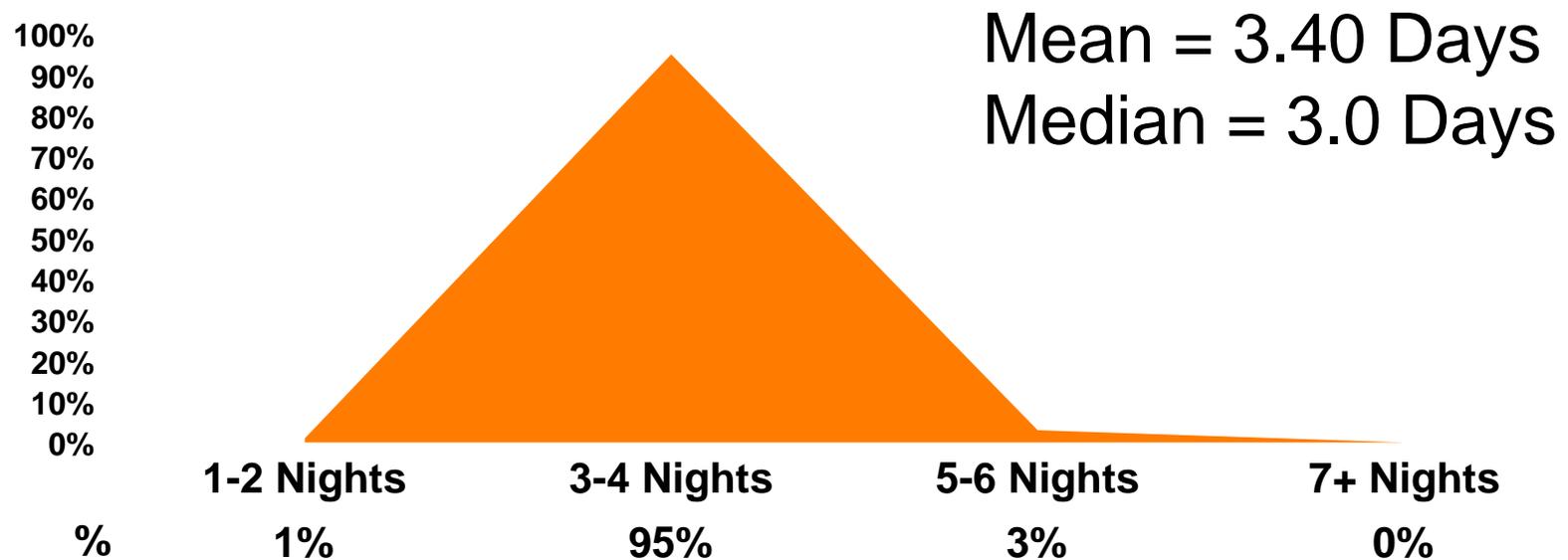


- The average repeat visitor has been to Guam 2.4 times.
- Less than half the repeat visitors have been to Guam within the last 2 years.

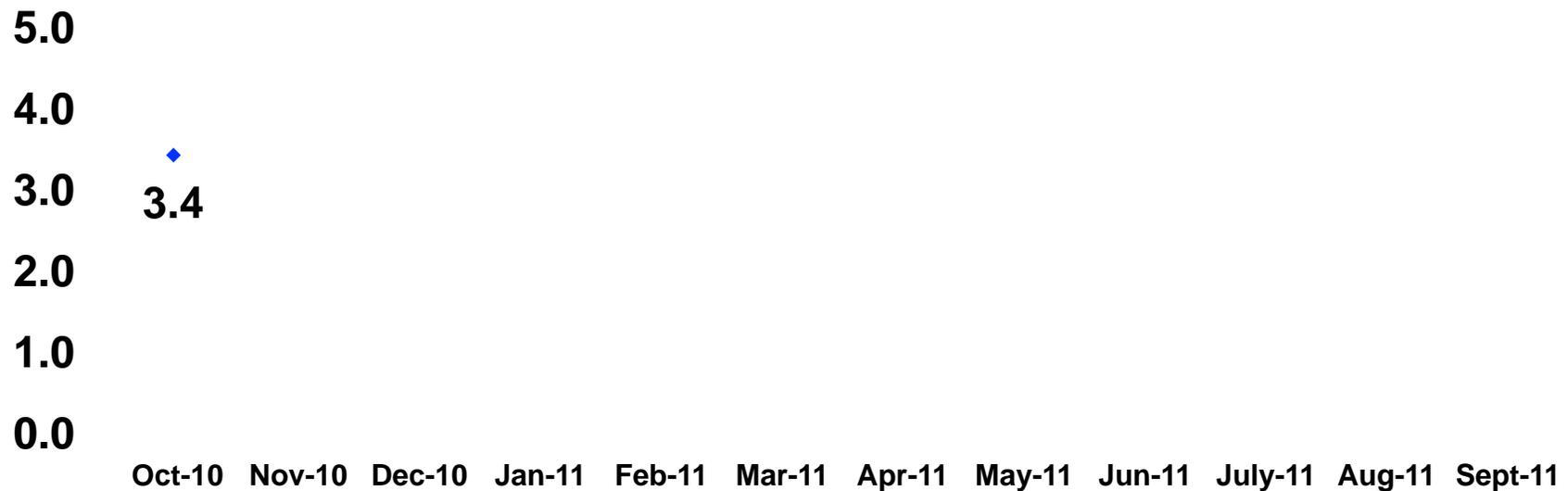
Average Number Overnight Trips (2005-2011) (2 nights or more)



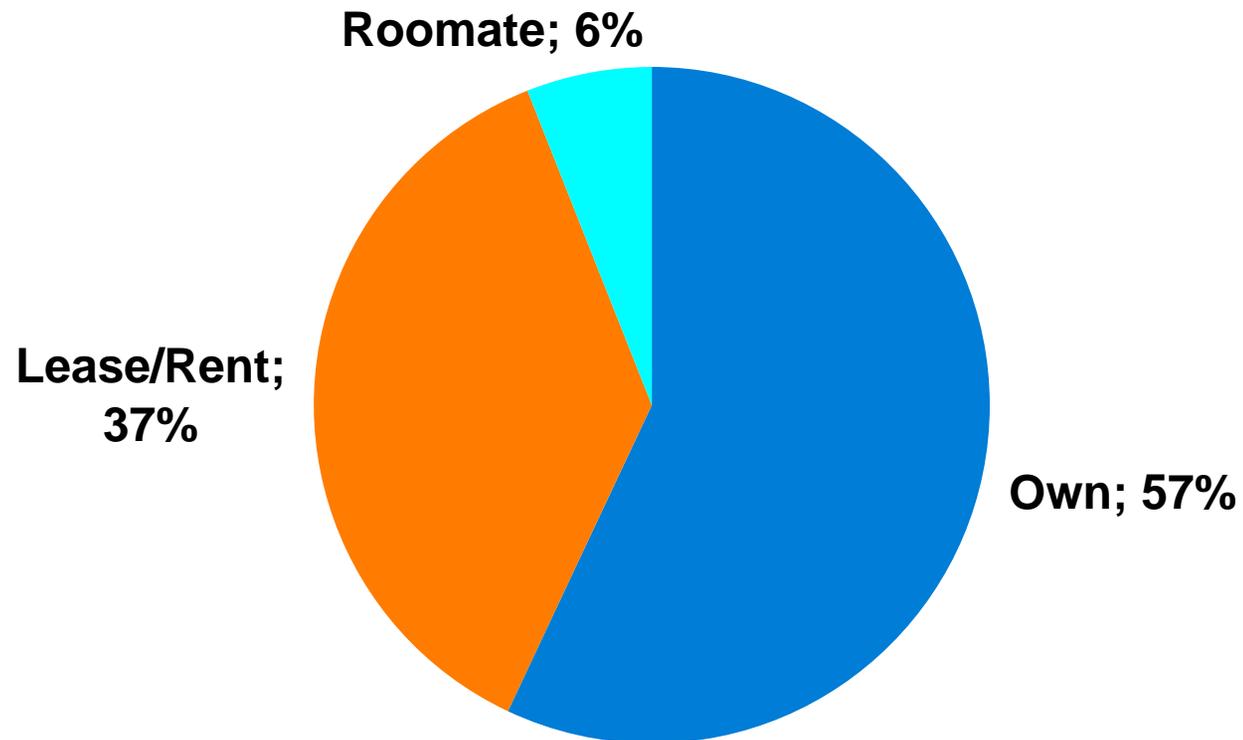
Length of Stay



Average Length of Stay Tracking



Living Accommodations

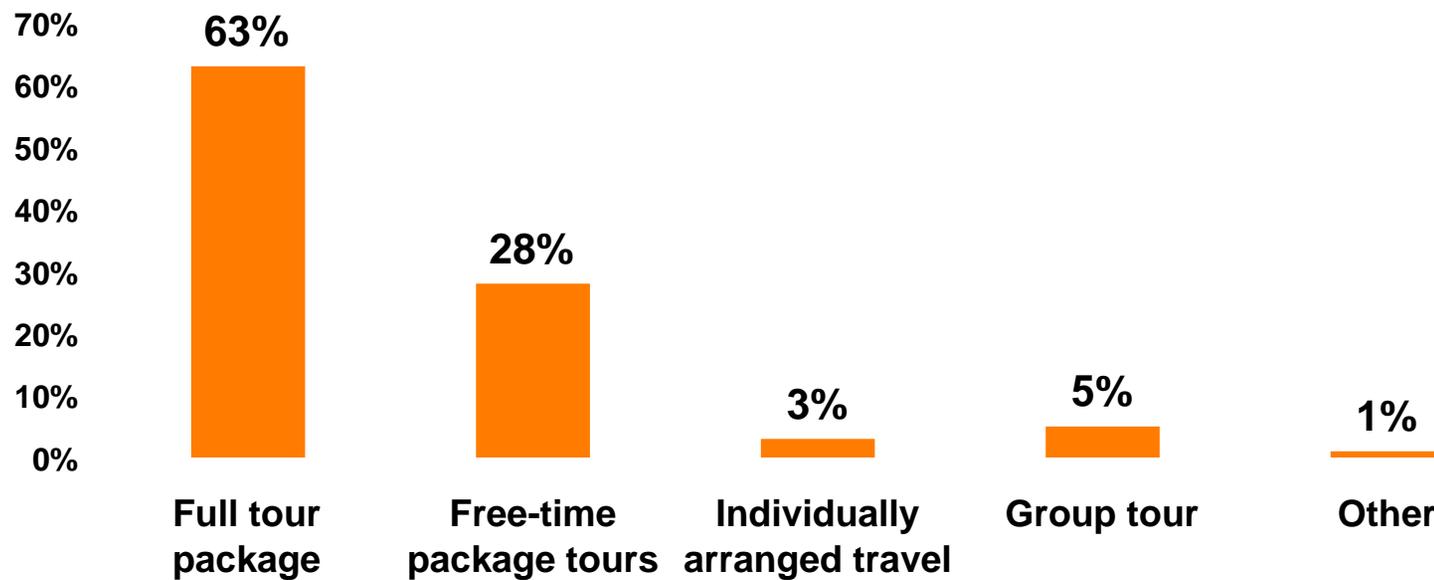


Occupation by Income

		TOTAL	PERSONAL INCOME				Refused
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	
Q.29	White Collar-Office	28%	16%	35%	24%	29%	
	Homemaker	14%	12%	11%	16%	14%	38%
	Self-employed	14%	8%	14%	13%	18%	
	Prof/Specialist/Tech	10%	12%	10%	9%	9%	25%
	Sales/Clerical	7%		4%	11%	9%	
	Service worker	6%	8%	8%	5%	3%	
	Manager	5%	8%	3%	6%	8%	
	Other	3%	8%	3%	3%	2%	
	Professor/Teacher	3%	8%		5%	2%	
	Govt - Office/non-mgr	2%	8%	4%		1%	
	Student	2%	4%	3%		2%	25%
	Skilled worker	2%		3%	3%	1%	
	Unemployed	1%	4%		1%		13%
	Govt-Exec	1%		2%		1%	
	Free-lancer	1%	4%		1%		
	Govt-Mgr	1%			1%	1%	
Total	Count	350	25	118	97	93	8

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

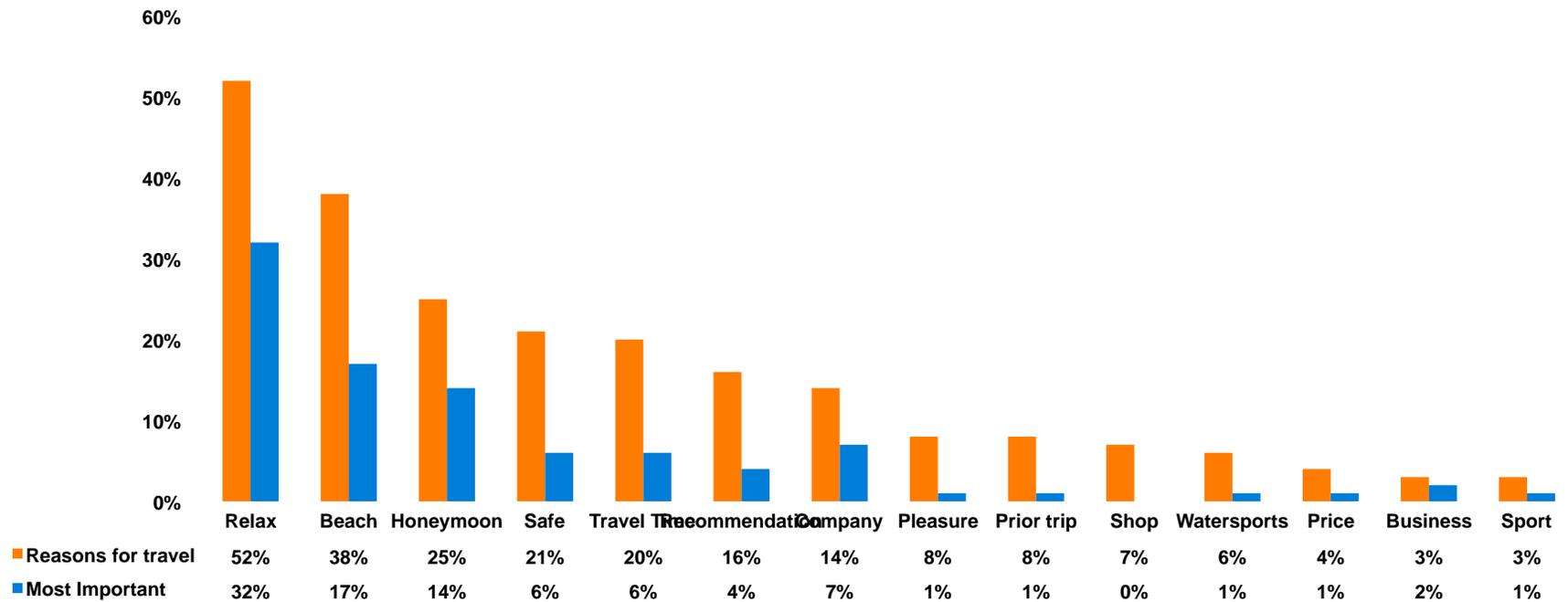


Accommodation by Income

Average length of stay: 3.40 days

	TOTAL	PERSONAL INCOME				
		<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9 Pacific Islands Club PIC	60%	46%	55%	62%	69%	63%
Sheraton Laguna Resort	9%	8%	14%	6%	3%	13%
Onward Beach Resort	8%	4%	8%	7%	12%	
Hyatt Regency Guam	8%	12%	8%	15%	1%	
The Westin Resort Guam	8%	12%	8%	5%	10%	
Holiday Resort Guam	1%	4%	2%	1%	1%	
Guam Marriott Resort Hotel	1%		1%	1%	2%	
Outrigger Guam Resort	1%	8%		2%		
Relatives, Friends, Home Stay	1%	4%			1%	13%
Hilton Guam Resort & Spa	1%	4%	2%			
Leo Palace Resort	0%		1%			
Hotel Nikko Guam	0%		1%			
Fiesta Resort Guam	0%					13%
Ramada Suites Guam	0%		1%			
Hotel Sane Fe	0%				1%	
Total Count	352	26	118	97	93	8

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
- Guam's natural beauty/beaches 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	
		20-29	30-39	40-49	50+	Male	Female
Q.5 Just to relax	52%	43%	55%	56%	31%	49%	54%
Beautiful seas, beaches, tropical climate	38%	32%	38%	46%	46%	38%	38%
Honeymoon	25%	61%	21%	4%		32%	19%
It is a safe place to spend a vacation	21%	17%	22%	21%	23%	21%	21%
Short travel time	20%	26%	21%	15%		16%	24%
Recommendation of friend, relative, travel agency	16%	13%	16%	17%	23%	13%	18%
My company sponsored me	14%	5%	13%	25%	15%	14%	14%
Pleasure	8%	4%	10%	8%	8%	7%	9%
A previous visit	8%	1%	7%	17%		5%	10%
Shopping	7%	8%	9%	4%		6%	9%
Water sports	6%	7%	5%	4%	23%	3%	8%
Price of the tour package	4%	7%	3%	6%		5%	3%
Company or Business trip	3%		3%	7%		3%	3%
Organized Sporting Activity	3%	1%	3%	4%		3%	2%
Promotional materials from GVB	2%	1%	2%	3%		3%	1%
To visit friends or relatives	2%		2%	4%		1%	2%
SCUBA diving	2%		2%	3%	8%	1%	2%
Other	2%		3%			2%	2%
Career certification or testing	1%	1%	2%	1%		1%	2%
To get married or Attend wedding	1%	1%			23%	2%	1%
To golf	1%		2%			1%	1%
Convention, Conference, Trade show	0%	1%					1%
Special promotion	0%	1%				1%	
Total Cases	353	76	192	72	13	176	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	52%	35%	52%	54%	56%	25%
Beautiful seas, beaches, tropical climate	38%	31%	33%	39%	46%	25%
Honeymoon	25%	58%	36%	22%	5%	38%
It is a safe place to spend a vacation	21%	23%	18%	22%	23%	13%
Short travel time	20%	19%	19%	19%	20%	38%
Recommendation of friend, relative, travel agency	16%	23%	14%	10%	20%	
My company sponsored me	14%	4%	10%	15%	18%	13%
Pleasure	8%	8%	5%	10%	10%	13%
A previous visit	8%	4%	6%	6%	12%	13%
Shopping	7%	4%	6%	12%	5%	13%
Water sports	6%		5%	5%	5%	25%
Price of the tour package	4%	8%	5%	5%	2%	
Company or Business trip	3%		3%	4%	4%	
Organized Sporting Activity	3%	4%	2%	3%	3%	
Promotional materials from GVB	2%		1%	4%	2%	
To visit friends or relatives	2%			2%	3%	13%
Other	2%		1%	3%	2%	
SCUBA diving	2%		1%	2%	2%	
Career certification or testing	1%		2%		2%	
To get married or Attend wedding	1%	4%	3%			
To golf	1%		2%		1%	
Convention, Conference, Trade show	0%	4%				
Special promotion	0%			1%		
Total Cases	353	26	118	97	94	8

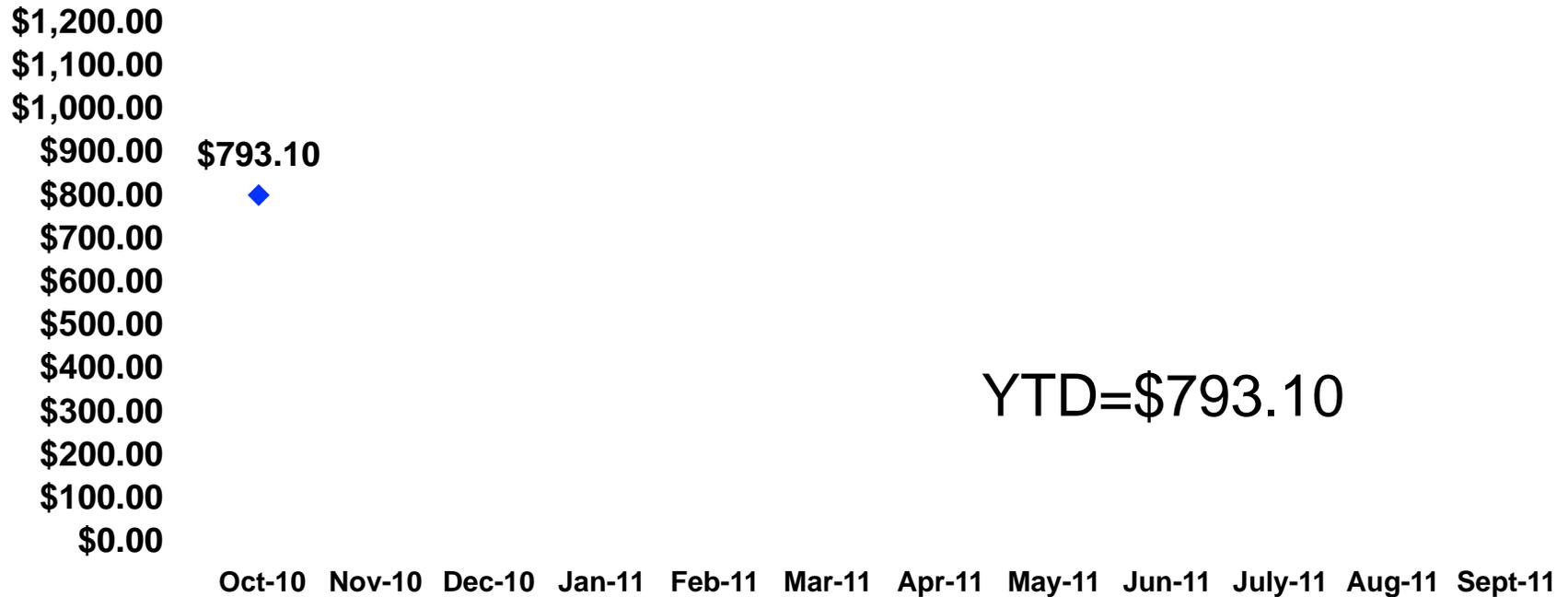
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1124.15/US\$1

- \$2,248.50 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$142,329 = maximum (highest amount recorded for the entire sample)
- \$793.10 = overall mean average per person prepaid expenditures

Prepaid Expenditures Tracking



Breakdown of Prepaid Expenditures

KW1124.15=\$1

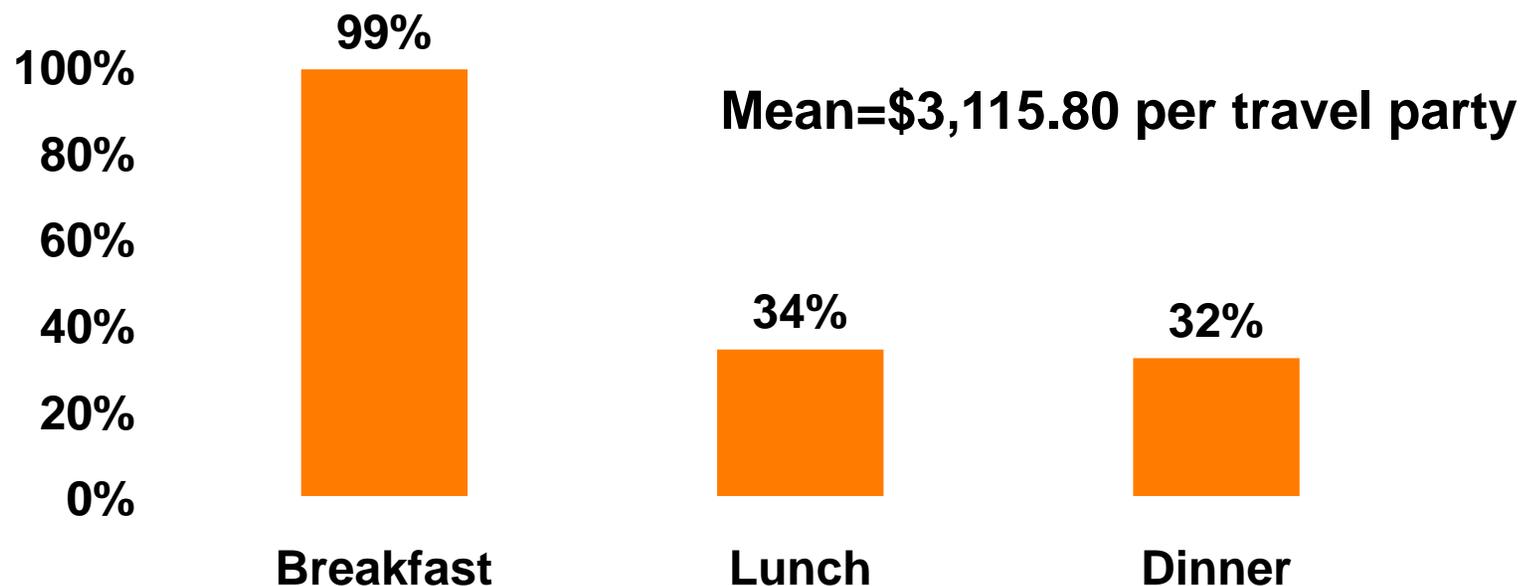
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,987.60
Air & Accommodation w/ daily meal package	\$3,115.80
Air only	\$509.30
Accommodation only	\$204.60
Accommodation w/ daily meal only	-
Food & Beverages in Hotel	\$120.70
Ground transportation- Korea	\$82.00
Ground transportation- Guam	\$92.60
Optional tours/ activities	\$289.90
Other expenses	\$532.40
Total Prepaid	\$2,248.50

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

n=188



Prepaid Meal Breakdown

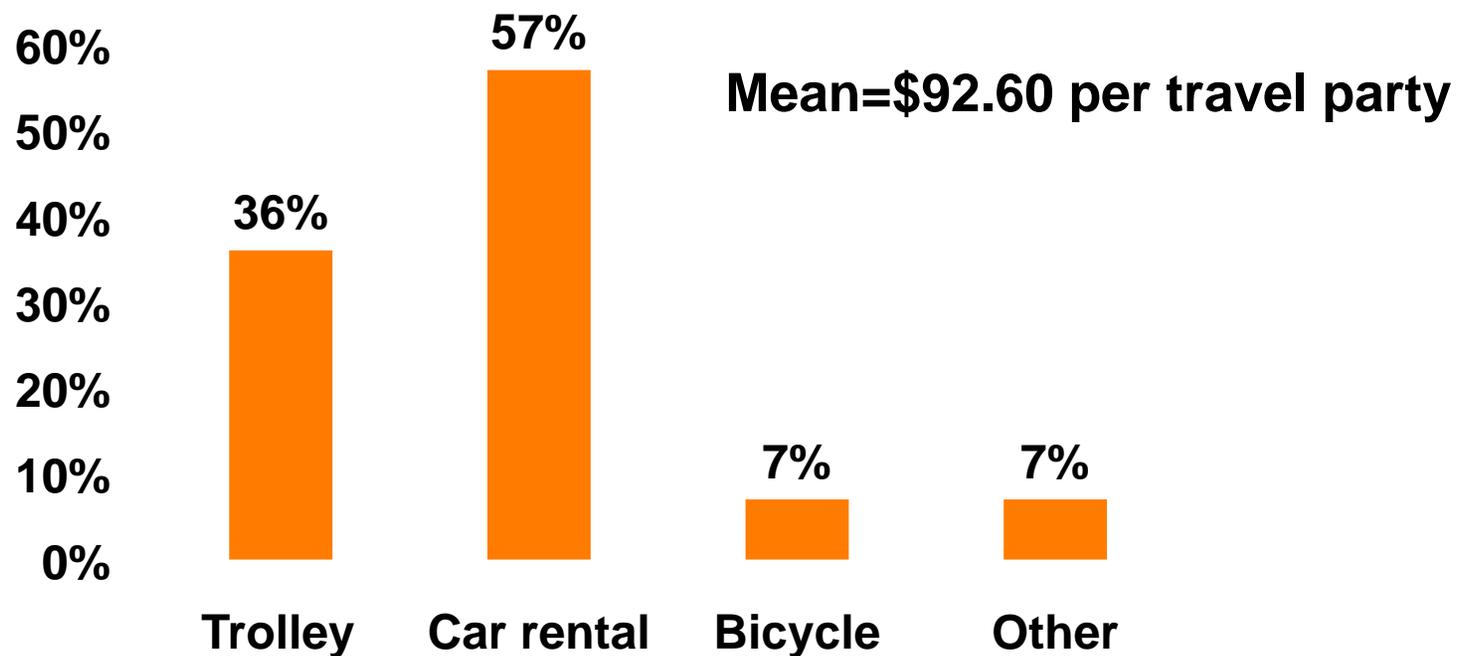
Accommodations with Daily Meal Package

n=0



Prepaid Ground Transportation

n=14



On-Island Expenditures

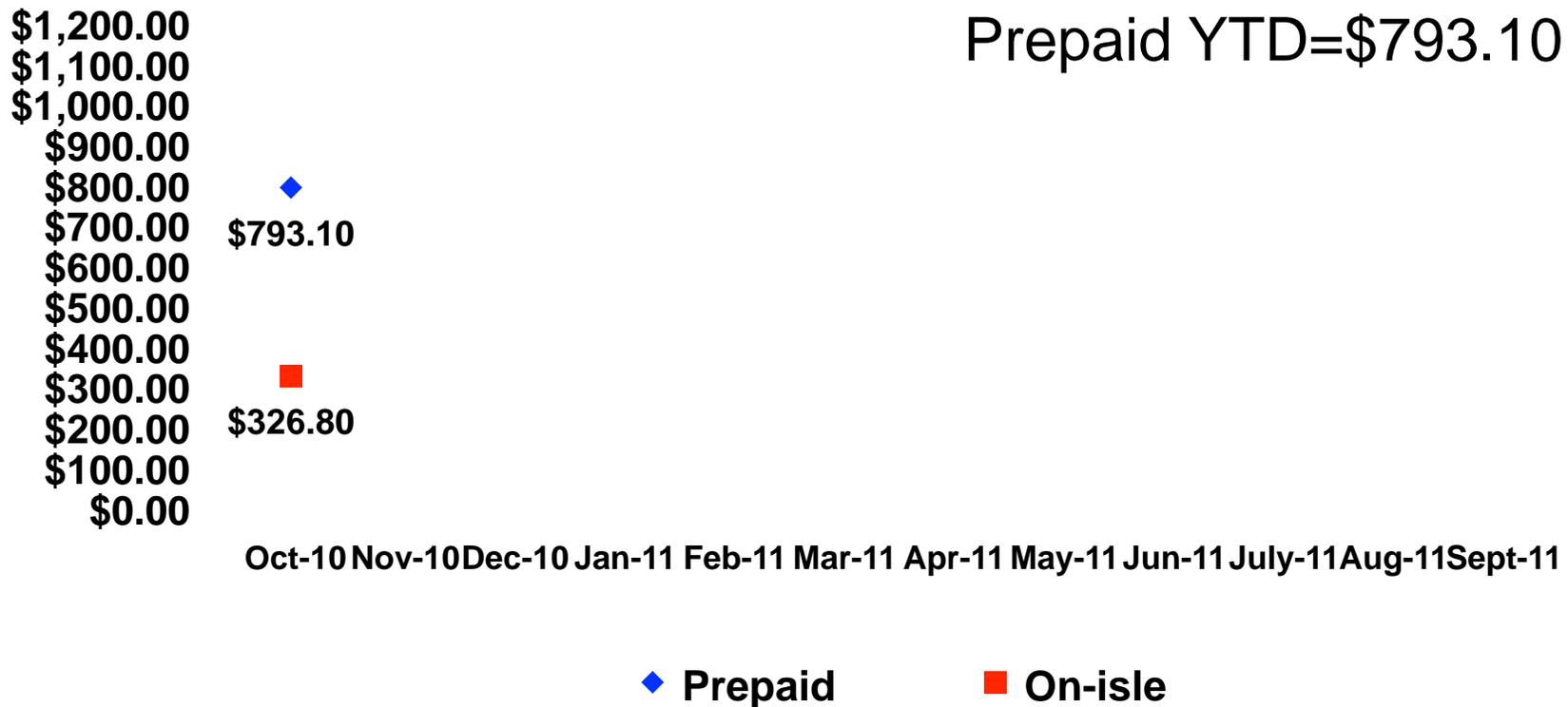
- \$733.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$326.80 = overall mean average per person on-island expenditure

On-Island Expenditures Tracking



Prepaid / On-Island Expenditures Tracking

On-Island YTD = \$326.80
Prepaid YTD = \$793.10



Total On-Island Expenditure by Gender & Age

	TOTAL	GENDER		GENDER							
		Male	Female	Male				Female			
				AGE				AGE			
				20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A Mean	\$733.81	\$752.68	\$715.05	\$582.68	\$795.41	\$810.80	\$564.29	\$701.40	\$711.19	\$811.96	\$445.00
Median	\$500	\$500	\$520	\$430	\$520	\$420	\$350	\$650	\$590	\$451	\$315

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$50.97	\$50.65	\$51.28	\$18.72	\$67.25	\$50.10	\$3.85
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$30.35	\$41.72	\$19.05	\$17.83	\$33.87	\$36.07	\$20.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$38.16	\$45.33	\$31.04	\$42.67	\$39.08	\$33.68	\$23.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$122.22	\$127.90	\$116.58	\$106.87	\$126.03	\$129.93	\$113.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$163.42	\$198.24	\$128.80	\$126.30	\$178.64	\$175.14	\$90.77
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/SOUV- F&F AT HOME	Mean	\$117.15	\$137.08	\$97.33	\$123.32	\$94.56	\$176.68	\$85.00
	Median	\$0	\$0	\$0	\$0	\$0	\$35	\$0
LOCAL TRANS	Mean	\$24.42	\$21.97	\$26.87	\$15.99	\$23.60	\$32.31	\$42.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$189.33	\$132.75	\$245.60	\$203.91	\$192.52	\$177.33	\$123.45
	Median	\$0	\$0	\$5	\$20	\$0	\$0	\$0
TOTAL ON ISLAND	Mean	\$733.81	\$752.68	\$715.05	\$652.97	\$751.99	\$811.24	\$509.23
	Median	\$500	\$500	\$520	\$500	\$545	\$435	\$350

On-Island Expenditures

First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$41.33	\$108.06
	Median	\$0	\$0
F&B-FF REST/CONV	Mean	\$26.32	\$54.22
	Median	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$32.30	\$72.86
	Median	\$0	\$0
OPTIONAL TOUR	Mean	\$131.11	\$69.61
	Median	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$154.78	\$214.63
	Median	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$118.40	\$109.71
	Median	\$0	\$0
LOCAL TRANS	Mean	\$18.12	\$61.76
	Median	\$0	\$0
OTHER EXP	Mean	\$189.25	\$189.84
	Median	\$0	\$14
TOTAL ON ISLAND	Mean	\$709.01	\$880.69
	Median	\$500	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,119.90 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,182 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

\$2,000.00

YTD=\$1,119.90

\$1,500.00

\$1,119.90

\$1,000.00

\$500.00

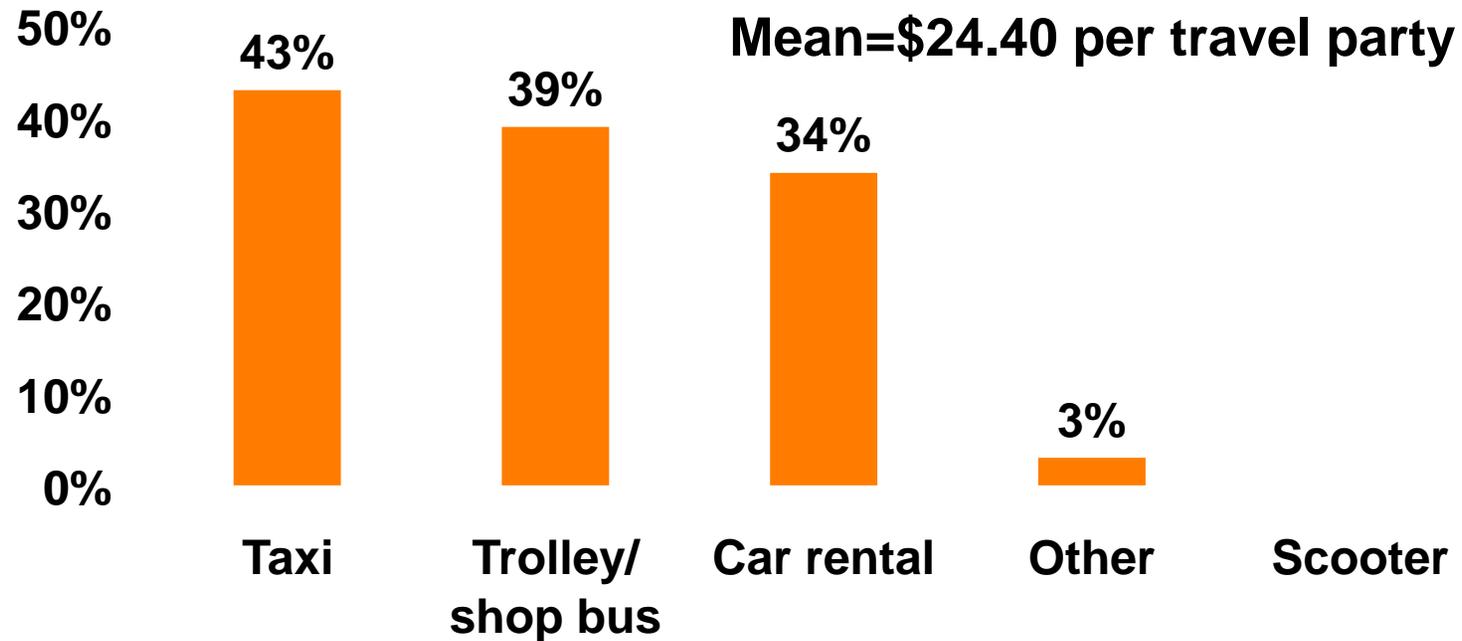
Oct-10 Nov-10 Dec-10 Jan-11 Feb-11 Mar-11 Apr-11 May-11 Jun-11 July-11 Aug-11 Sept-11

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$51.00
Food & beverage in fast food restaurant/ convenience store	\$30.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$38.20
Optional tours and activities	\$122.20
Gifts/ souvenirs for yourself/companions	\$163.40
Gifts/ souvenirs for friends/family at home	\$117.10
Local transportation	\$24.40
Other expenses not covered	\$189.30
Average Total	\$733.80

Local Transportation

n=98



Guam Airport Expenditures

- \$70.90 = 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

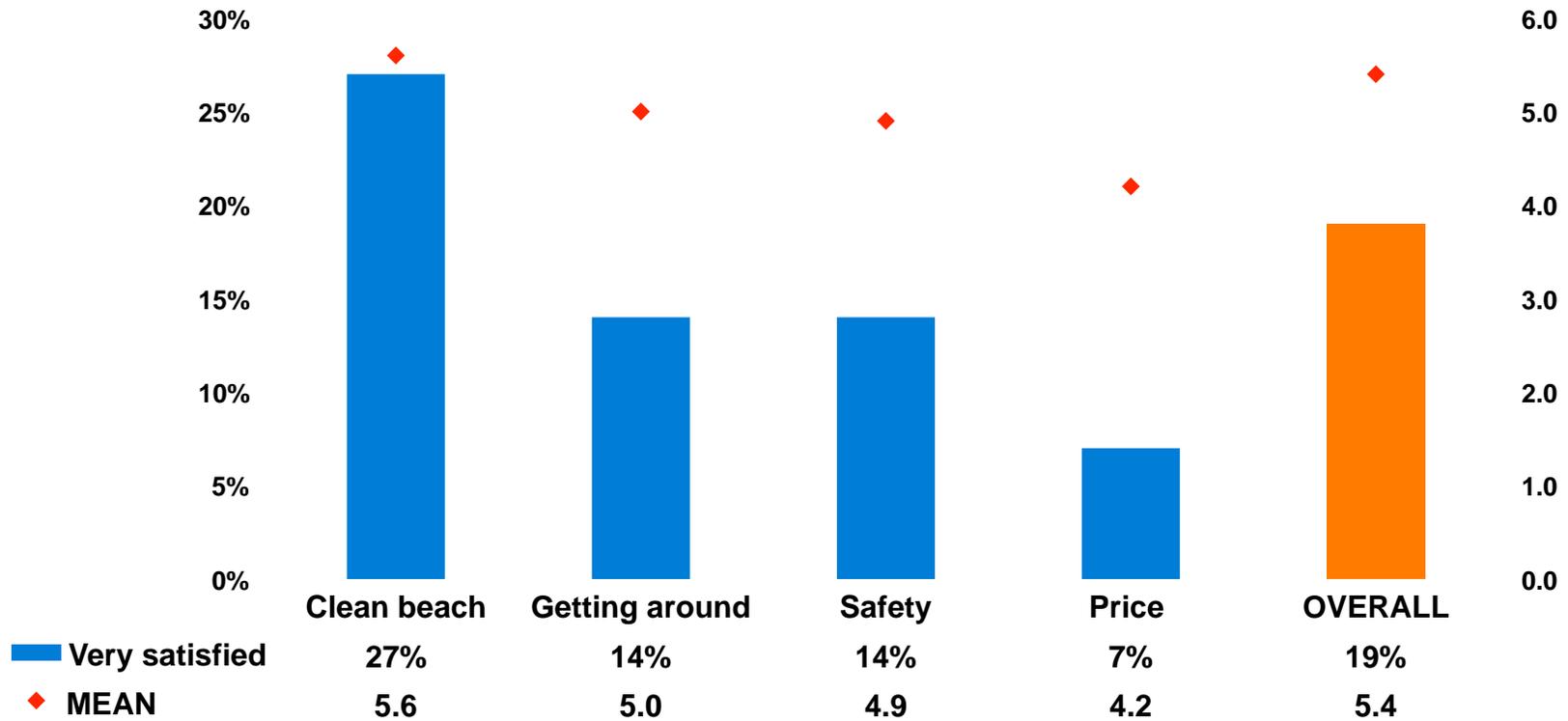
	MEAN \$
Food & Beverages	\$4.60
Gifts/Souvenirs Self	\$30.60
Gifts/Souvenirs Others	\$35.70
Total	\$70.90

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

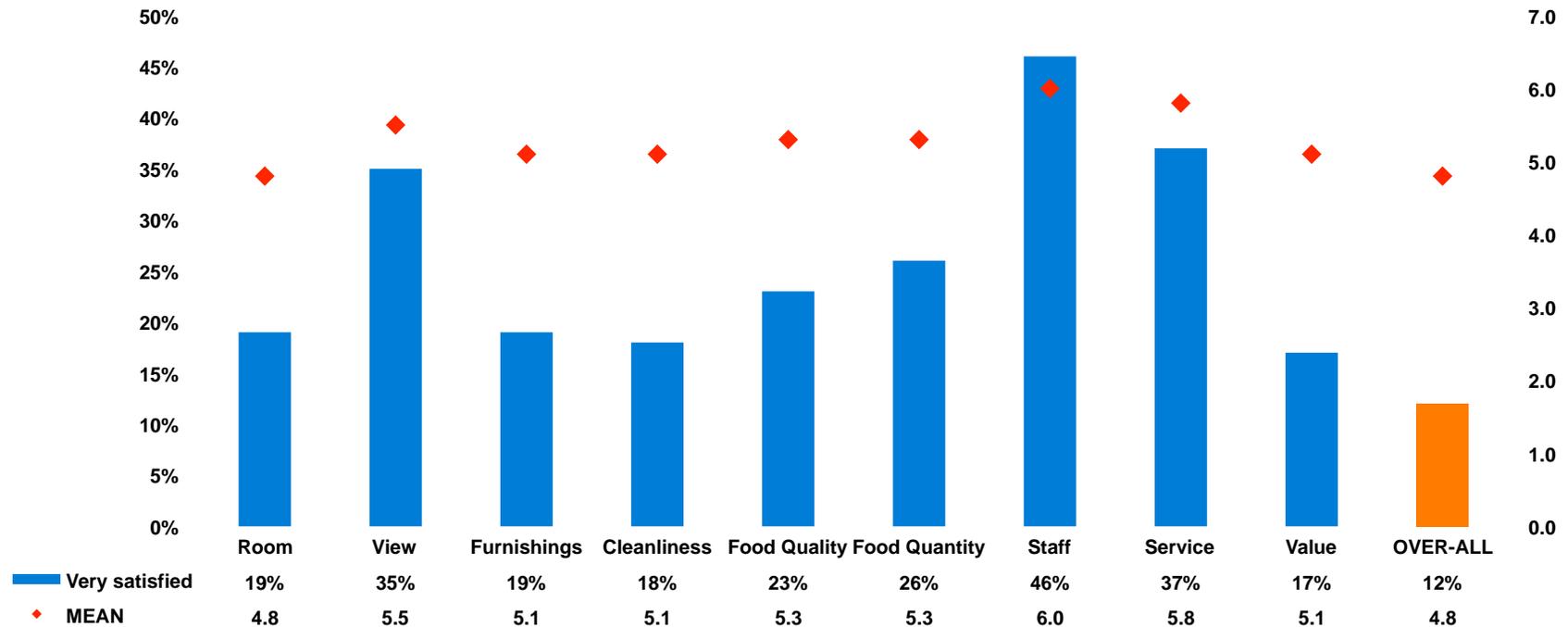
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

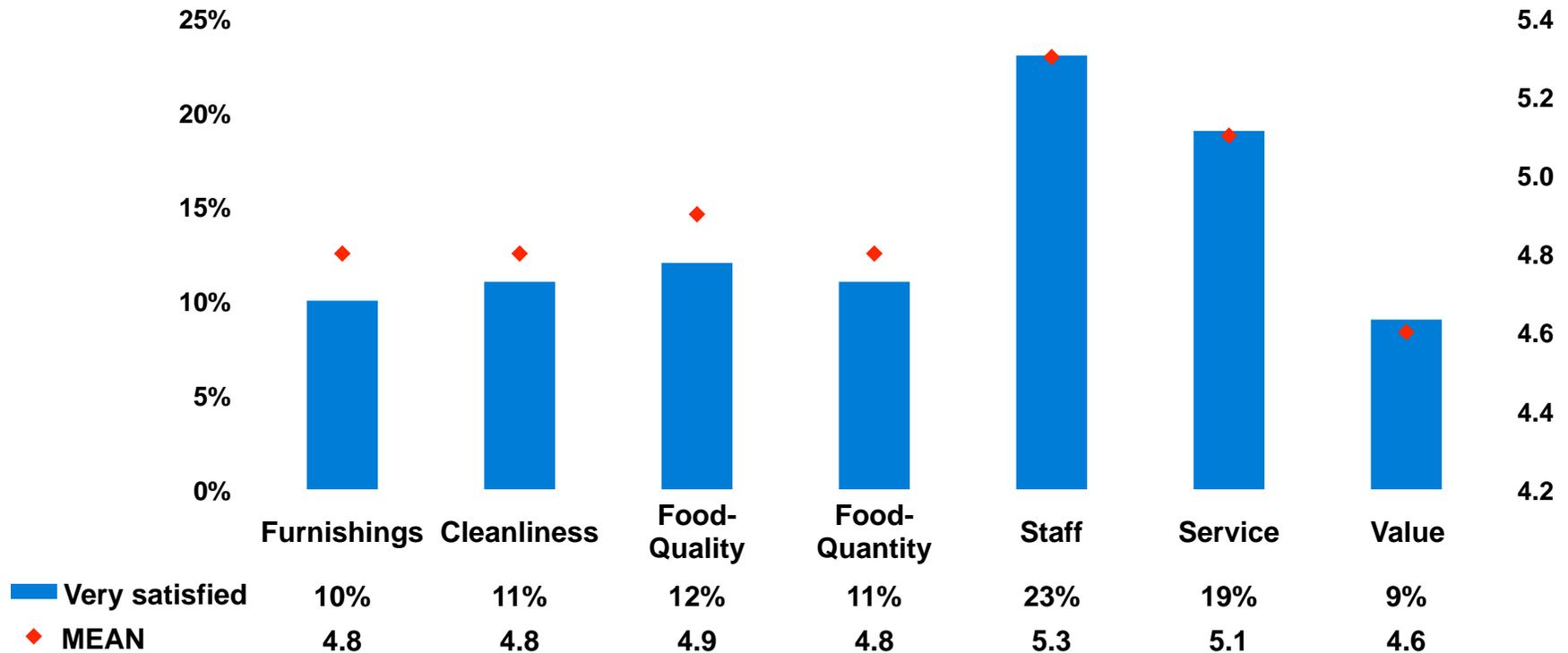
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

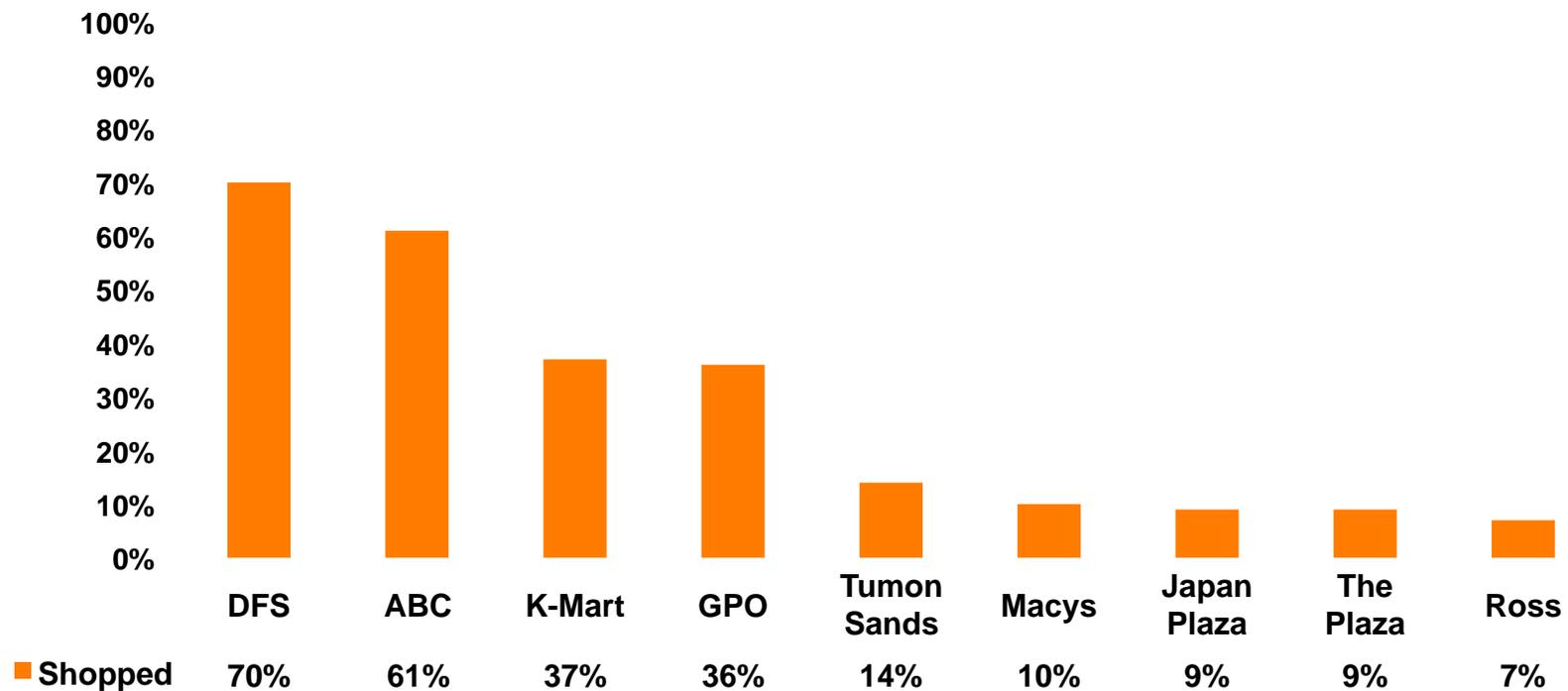
7pt Rating Scale

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 = **43%**

Score of 4 to 5 = **47%**

Score 1 to 3 = **10%**

MEAN = 5.1

Variety of Shopping

Score of 6 to 7 = **37%**

Score of 4 to 5 = **48%**

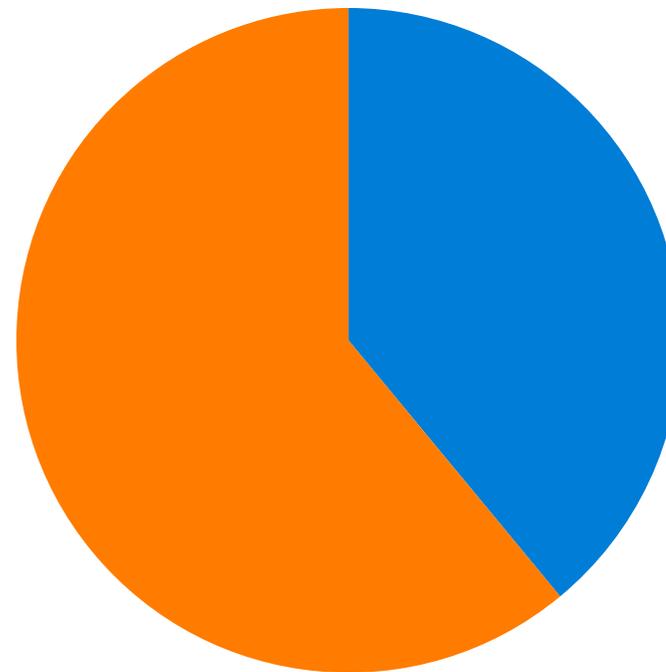
Score 1 to 3 = **14%**

MEAN = 4.9

Optional Tour Participation

- Average number of tours participated in is 1.2

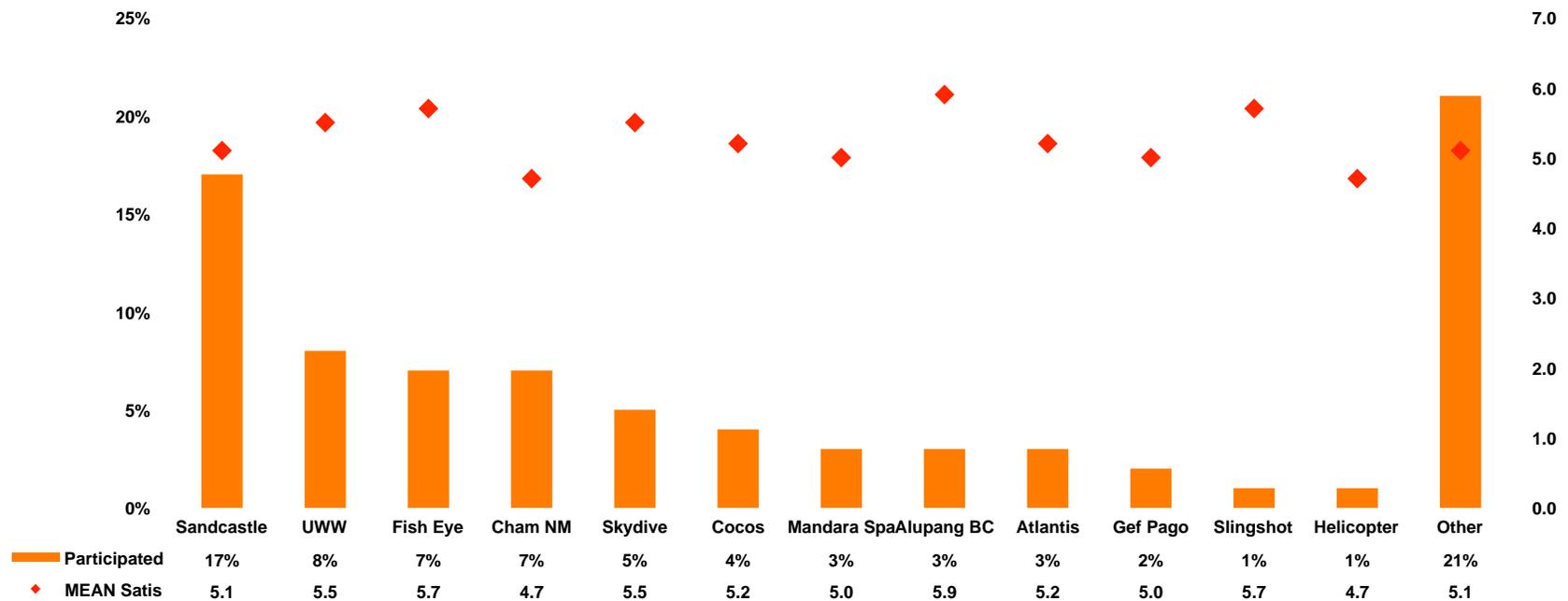
**One or more
61%**



**None
39%**

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 = **39%**

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

Score 1 to 3 = **8%**

MEAN = 5.0

Variety of Day Tour

Score of 6 to 7 = **33%**

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 = **24%**

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

Score 1 to 3 = **17%**

MEAN = 4.4

Variety of Night Tour

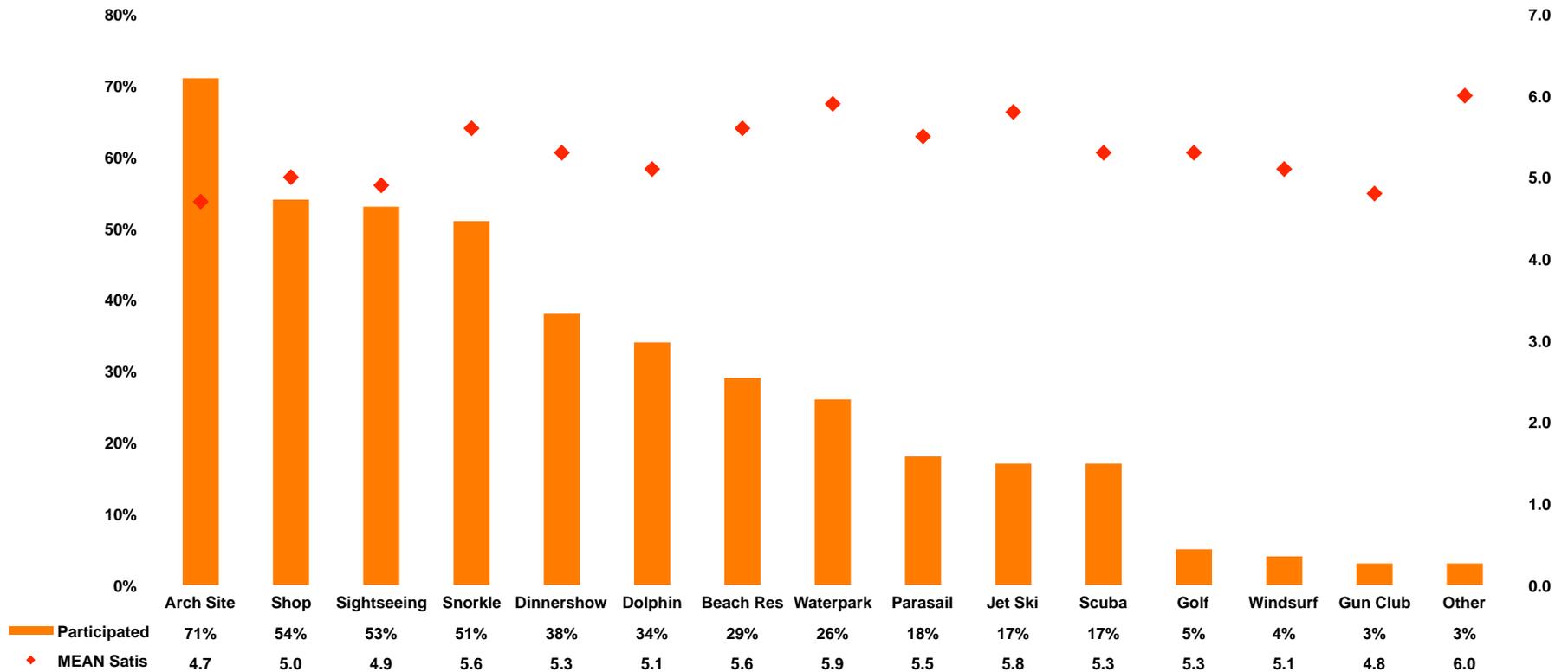
Score of 6 to 7 = **22%**

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

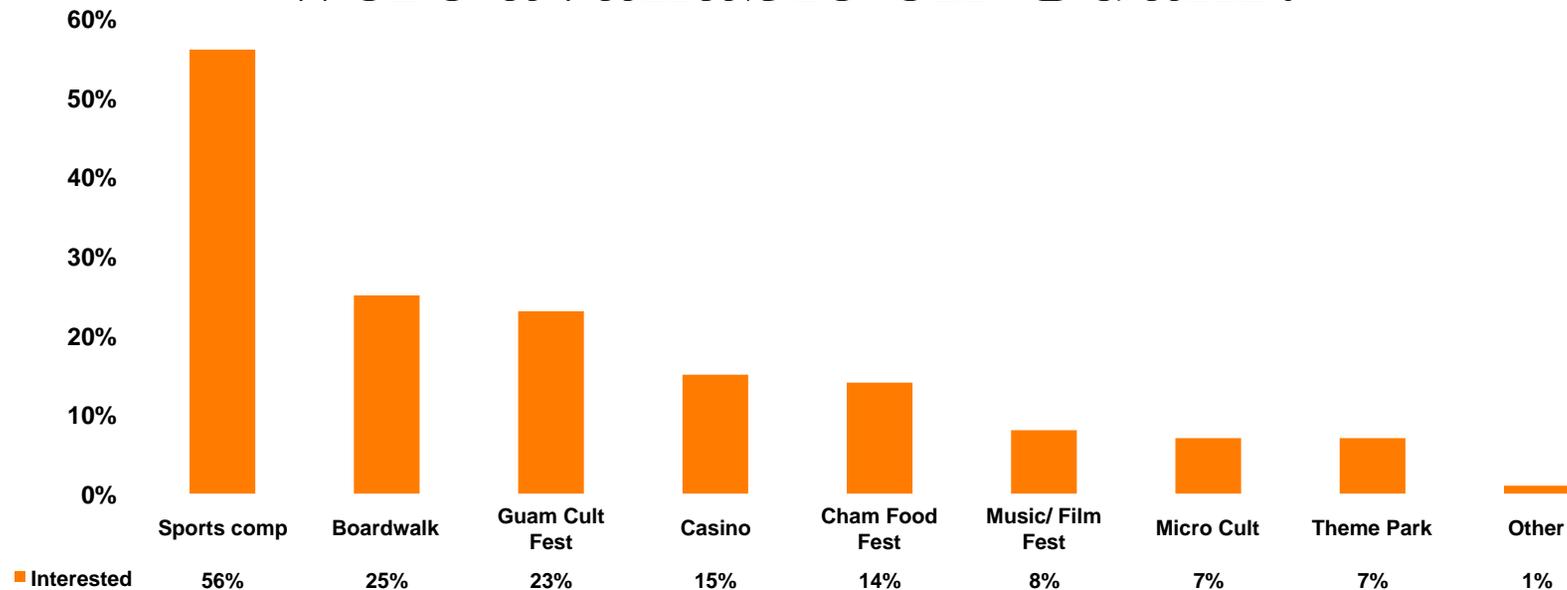
Score 1 to 3 = **19%**

MEAN = 4.4

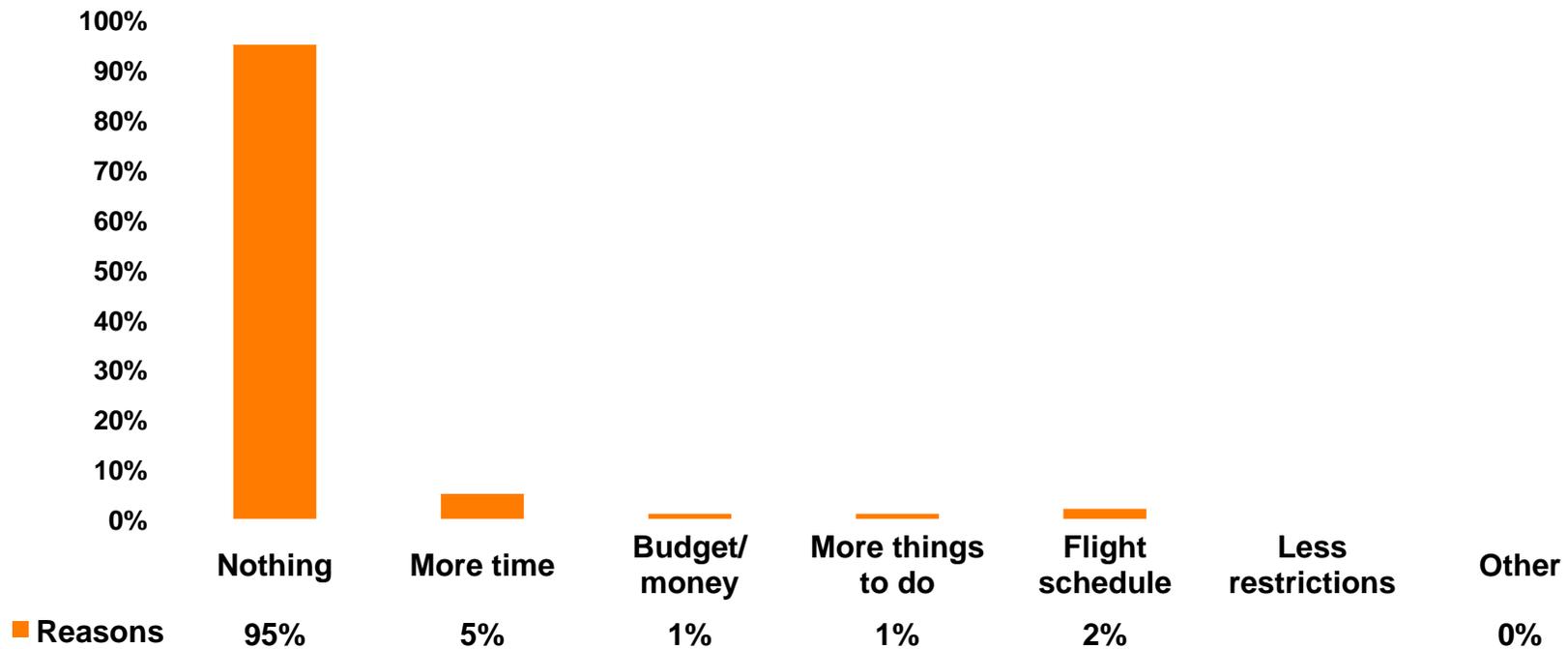
Satisfaction with Other Activities



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



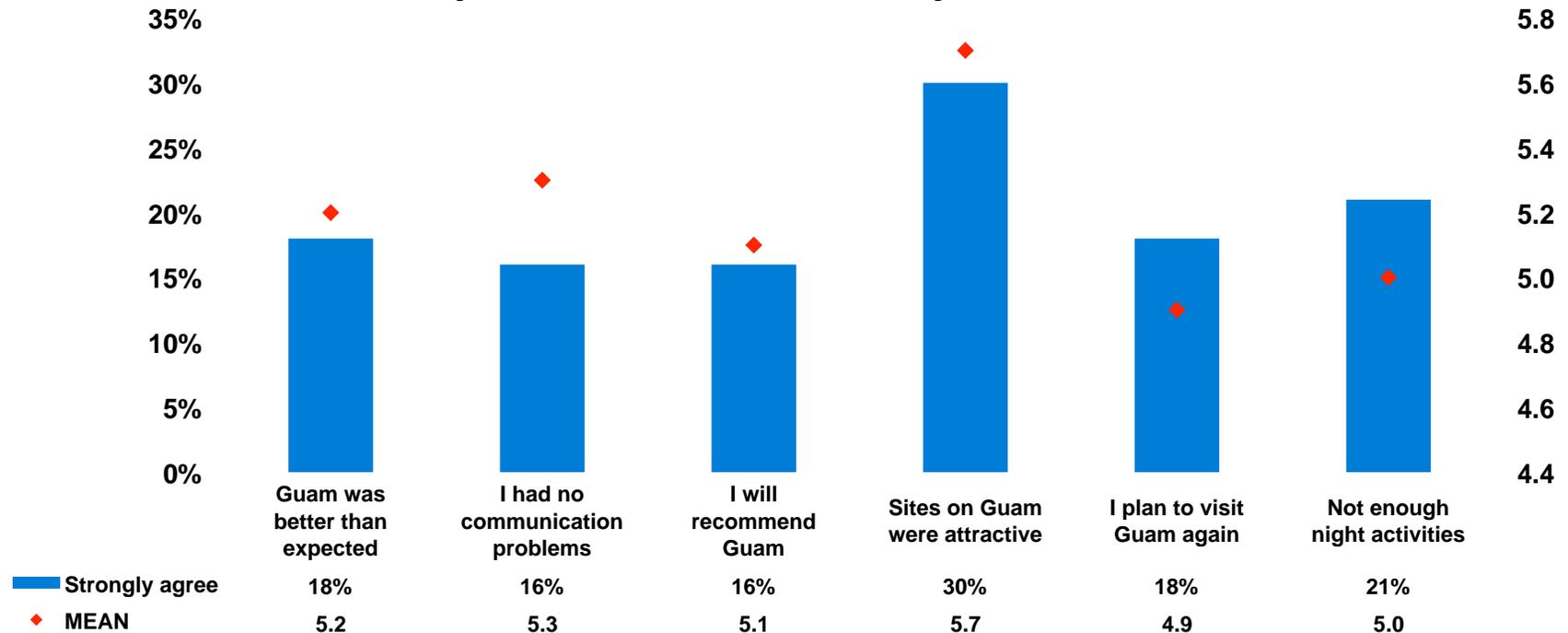
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

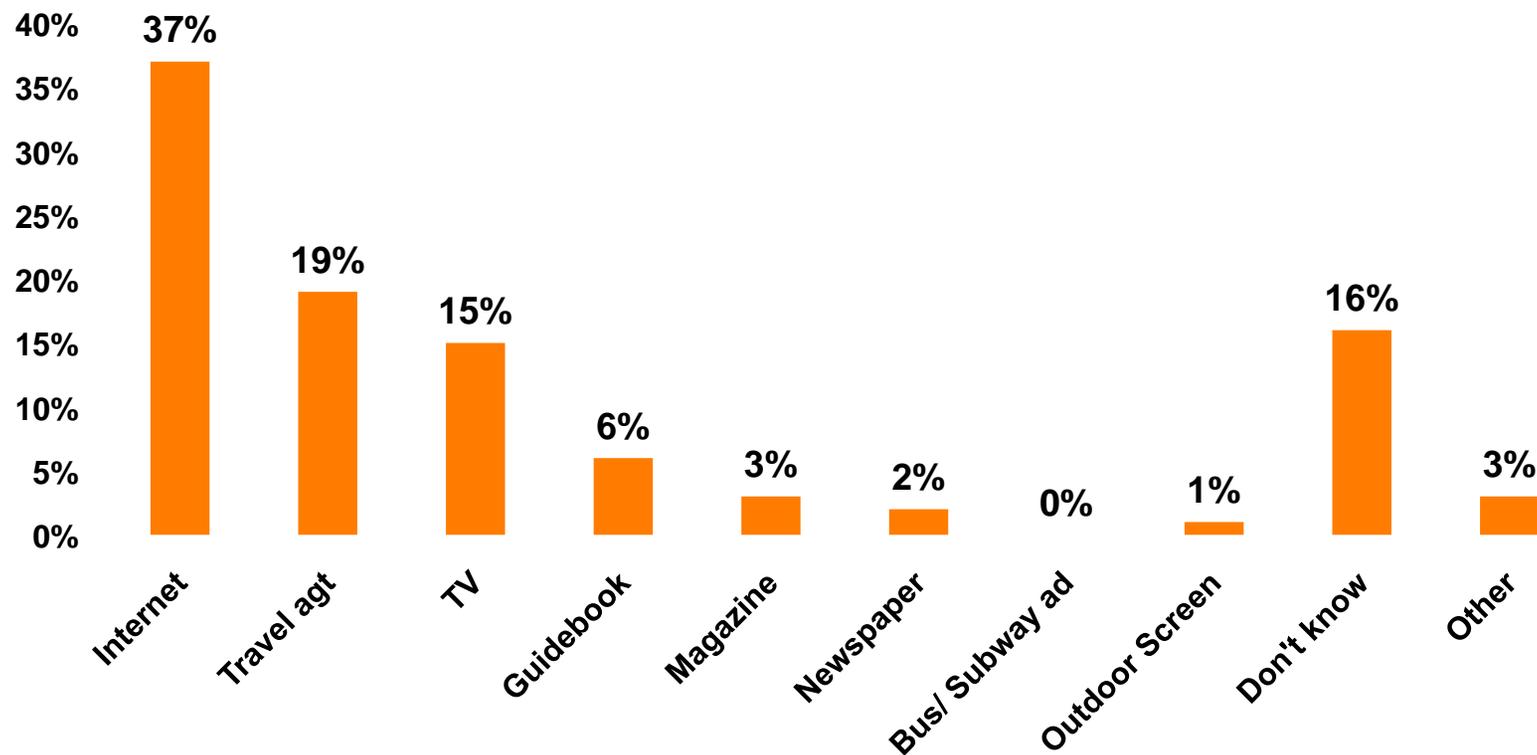
7=Very Satisfied/ 1=Very Dissatisfied



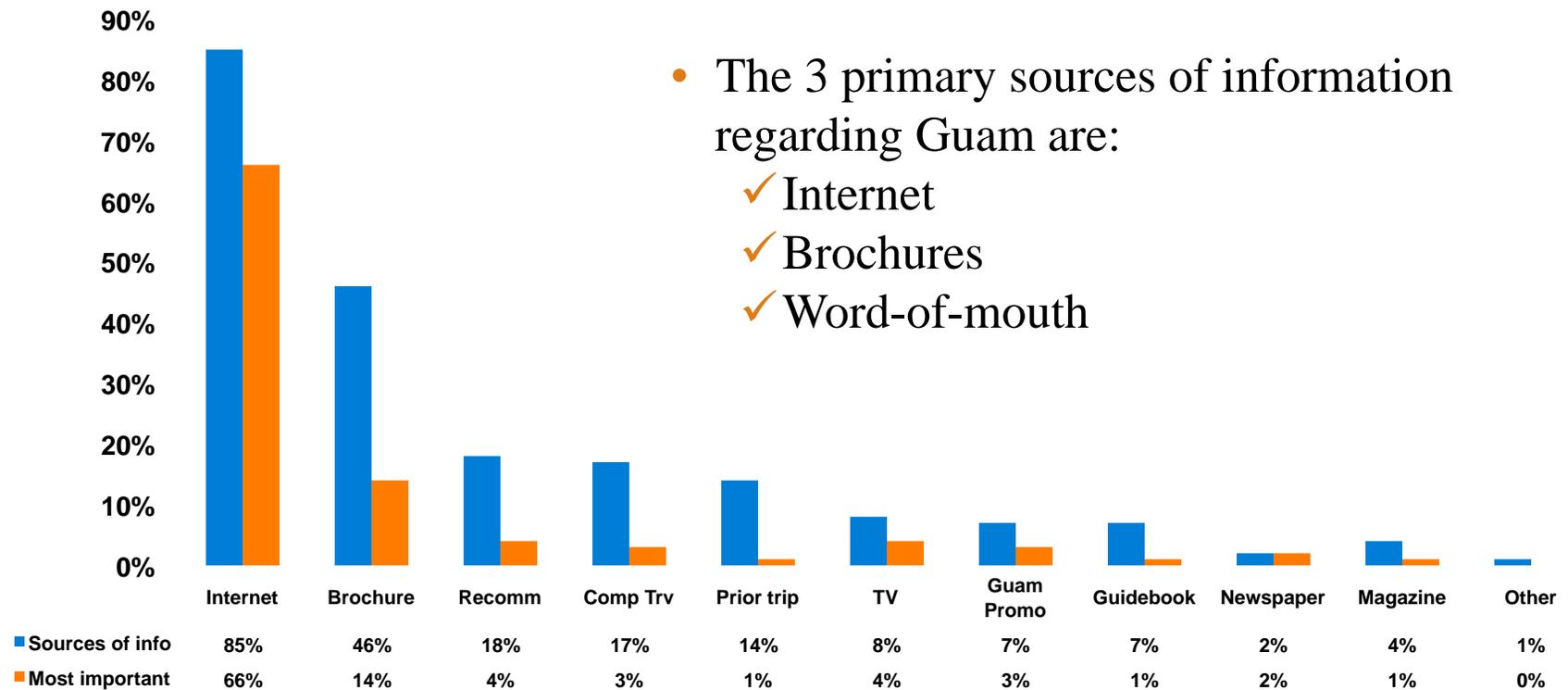
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

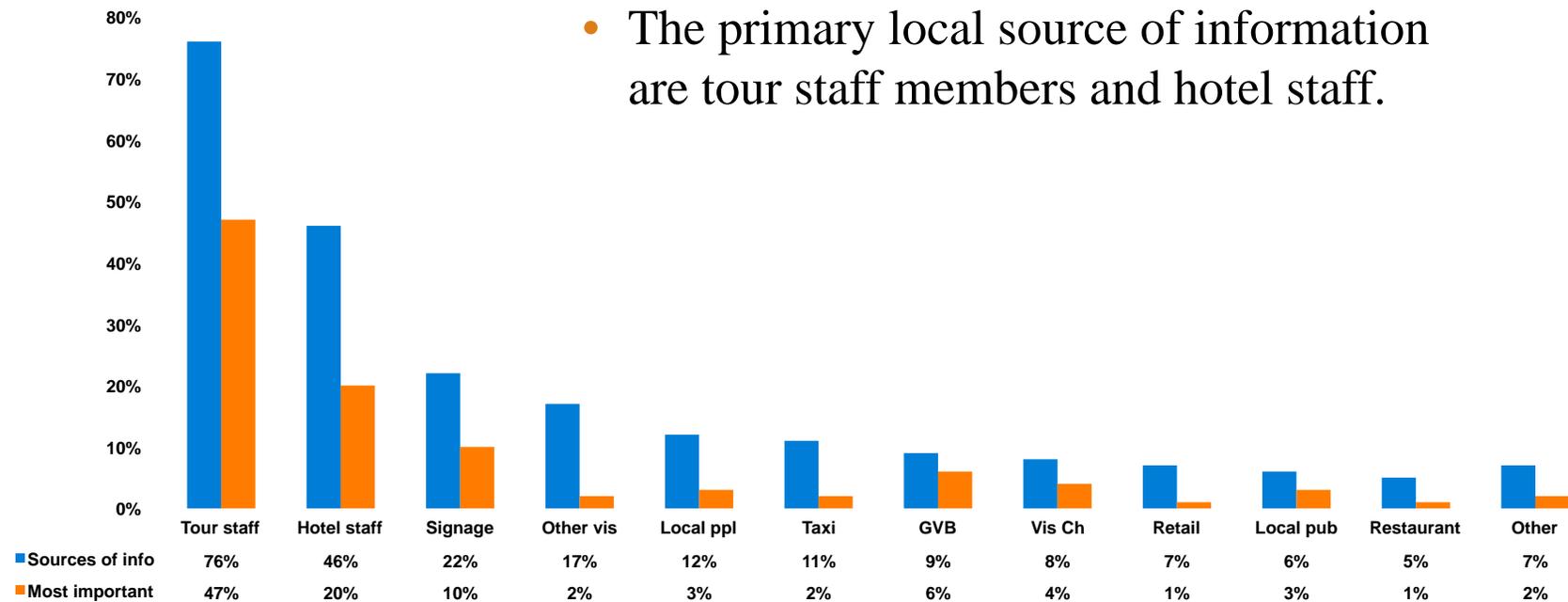
Past 90 days



Sources of Information Pre-arrival



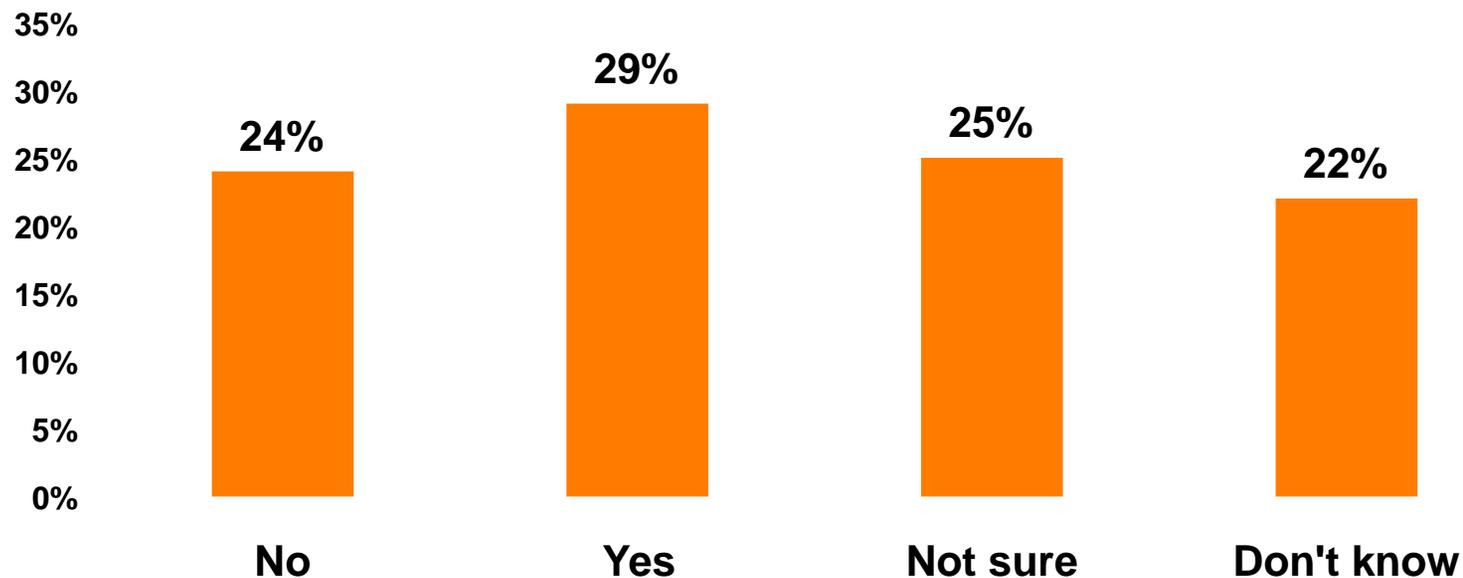
Sources of Information Post-arrival



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

SECTION 6
OTHER ISSUES

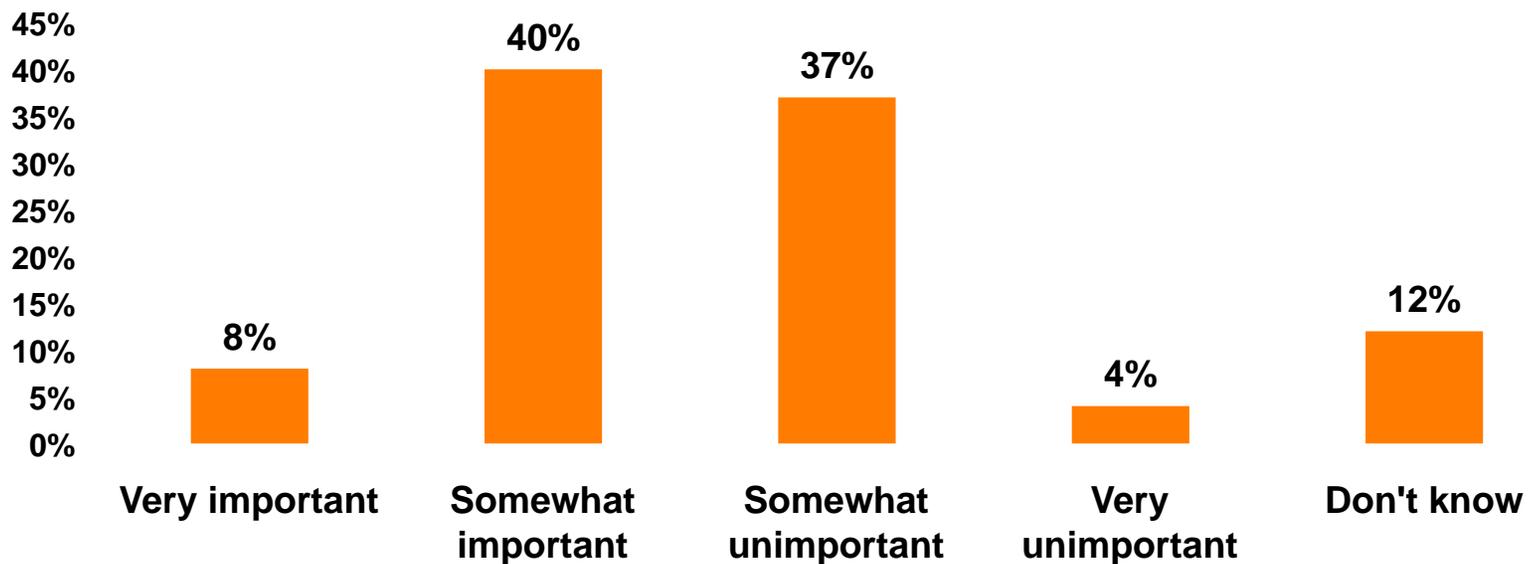
Good time to spend money on travel outside of Korea - Overall



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	24%	24%	22%	38%	23%	31%	23%	18%	13%
	Yes	32%	26%	36%	8%	31%	19%	32%	38%	33%
	Not sure	22%	28%	21%	31%	23%	27%	23%	24%	33%
	Do not know	22%	22%	21%	23%	23%	24%	23%	19%	13%
Total	Count	76	192	72	13	26	118	97	94	8

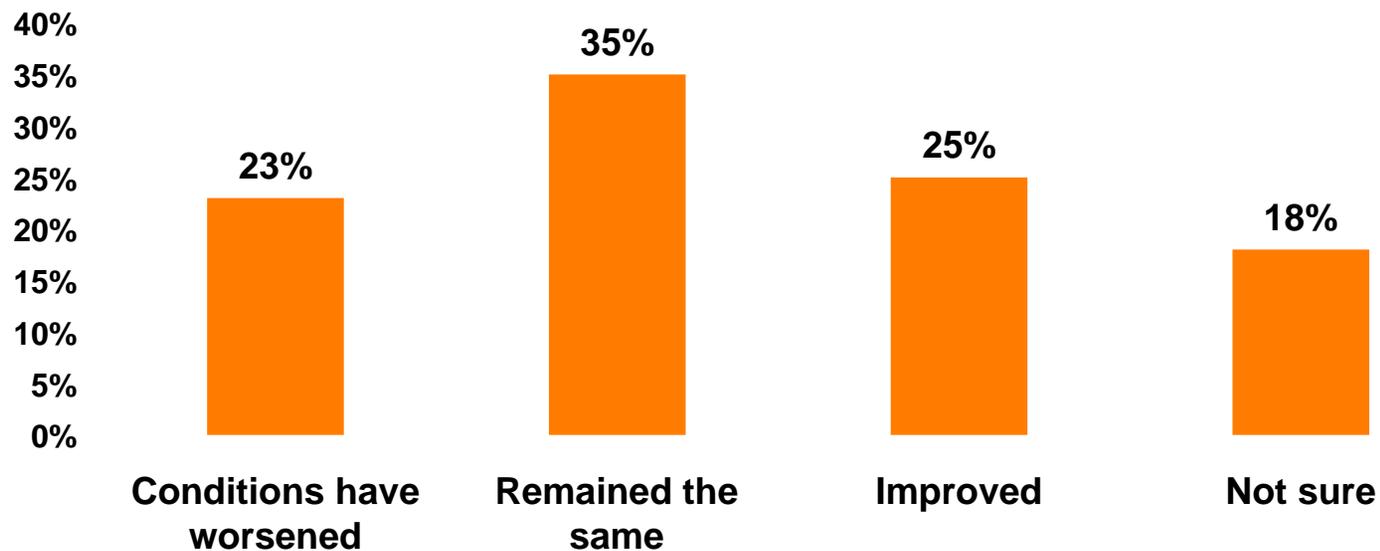
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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	4%	5%	1%		4%	3%	5%	1%	13%
	Somewhat unimportant	28%	36%	49%	31%	35%	37%	36%	38%	63%
	Somewhat important	43%	39%	35%	54%	50%	37%	39%	44%	25%
	Very important	7%	9%	8%	8%	4%	8%	12%	7%	
	Don't know	18%	11%	7%	8%	8%	14%	7%	10%	
Total	Count	76	192	72	13	26	118	97	94	8

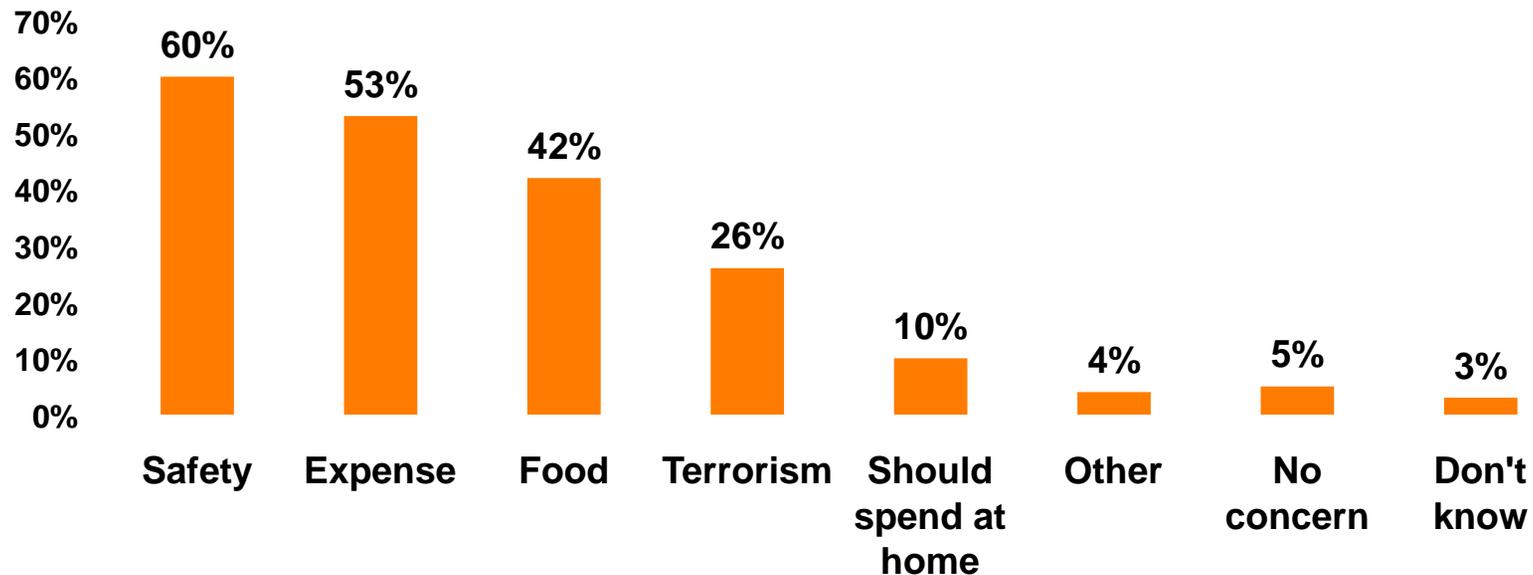
Rating Korean Economy Compared to 12 months ago



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	24%	24%	21%	15%	19%	25%	27%	17%	25%
	Conditions have remained the same	37%	33%	33%	46%	23%	40%	34%	32%	25%
	Conditions have improved	17%	25%	32%	23%	27%	13%	27%	37%	38%
	Do not know	22%	18%	14%	15%	31%	23%	12%	14%	13%
Total	Count	76	192	72	13	26	118	97	94	8

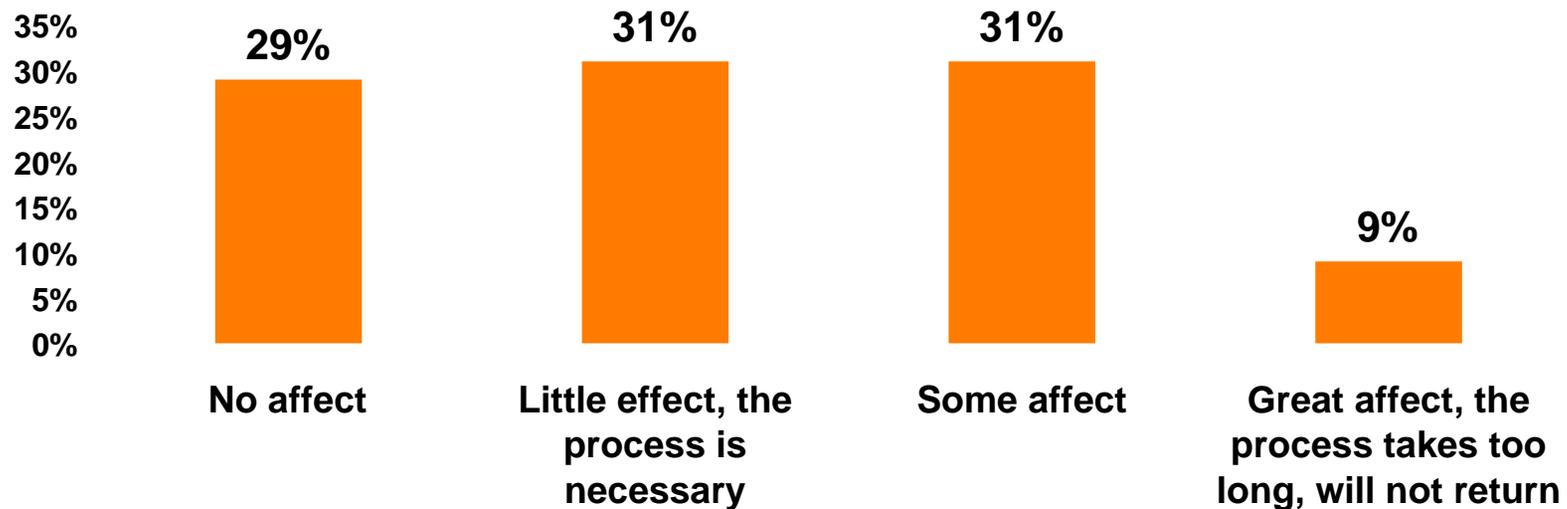
Concerns about travel outside of Korea - Overall



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	57%	61%	61%	62%	58%	57%	61%	65%	50%
	Expense	51%	55%	50%	38%	69%	55%	52%	47%	50%
	Food	45%	42%	40%	46%	58%	42%	43%	37%	50%
	Terrorism	21%	29%	25%	15%	35%	26%	27%	23%	38%
	Spending money abroad when it should be spent at home	9%	12%	7%	8%	19%	9%	10%	9%	25%
	No concerns	7%	3%	6%	8%	8%	7%	2%	4%	
	Other	7%	3%	6%	8%	8%	4%	4%	3%	
	Do not know	5%	2%	3%	8%	4%	4%		3%	
Total	Cases	76	190	72	13	26	118	97	94	8

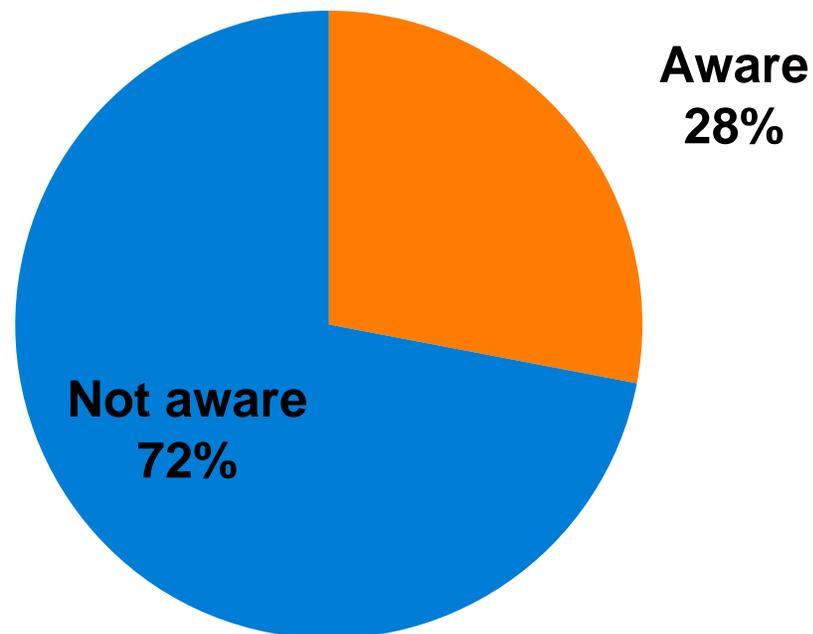
Security Screening/ Immigration Process at Guam International Airport



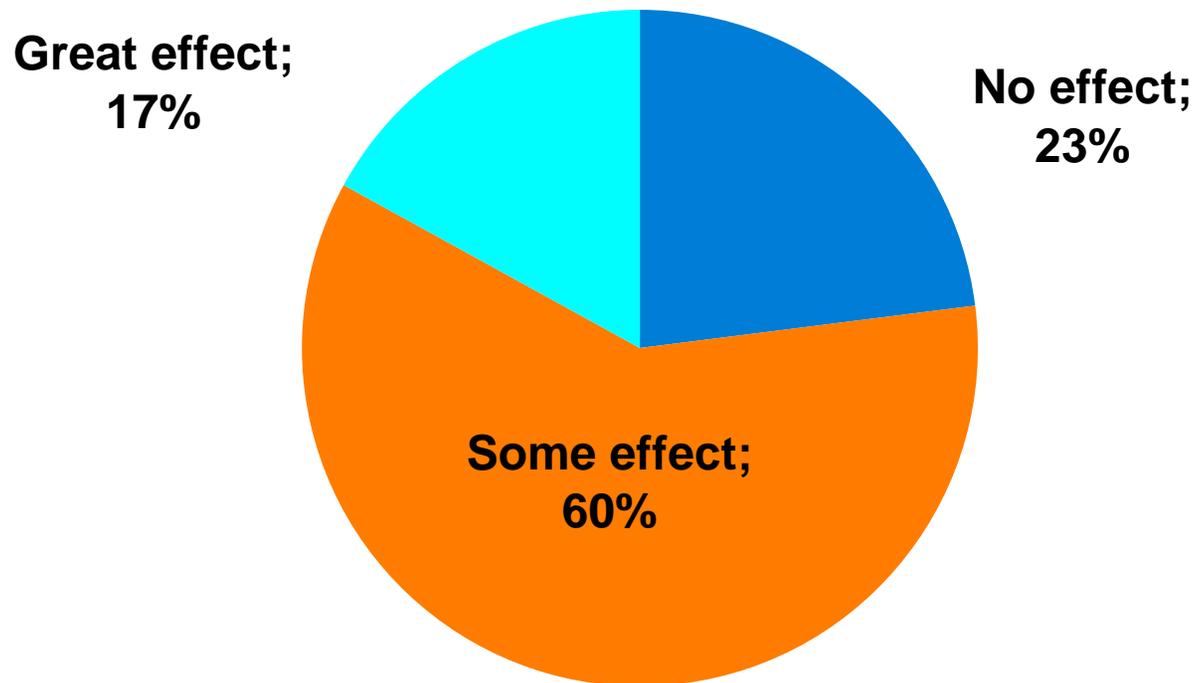
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **3.2** out of possible 7.0
- Agree (Score 6-7) – **9%**
- Neutral (Score 4-5) – **44%**
- Disagree (Score 1-3) – **46%**

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

