



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

OCTOBER 2011



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.

Background & Methodology

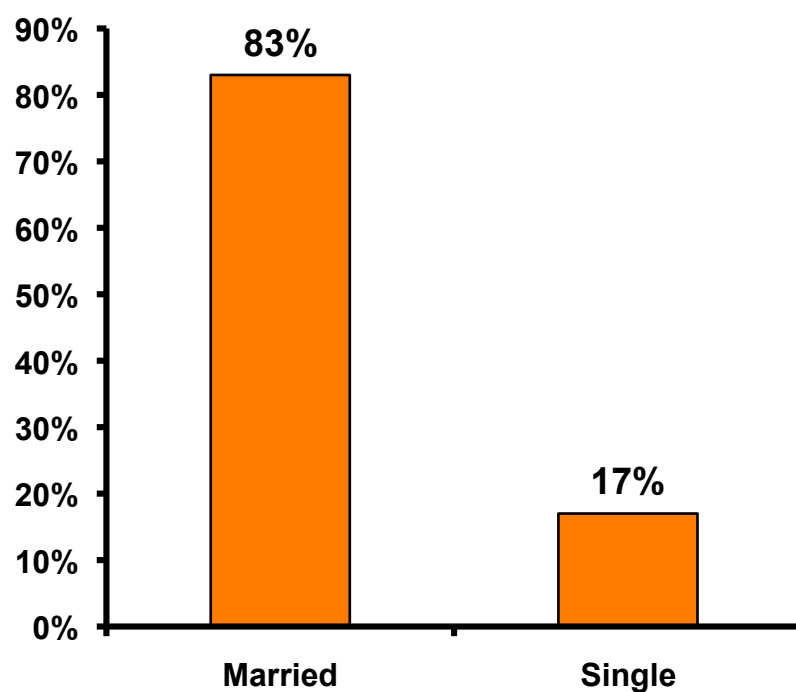
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

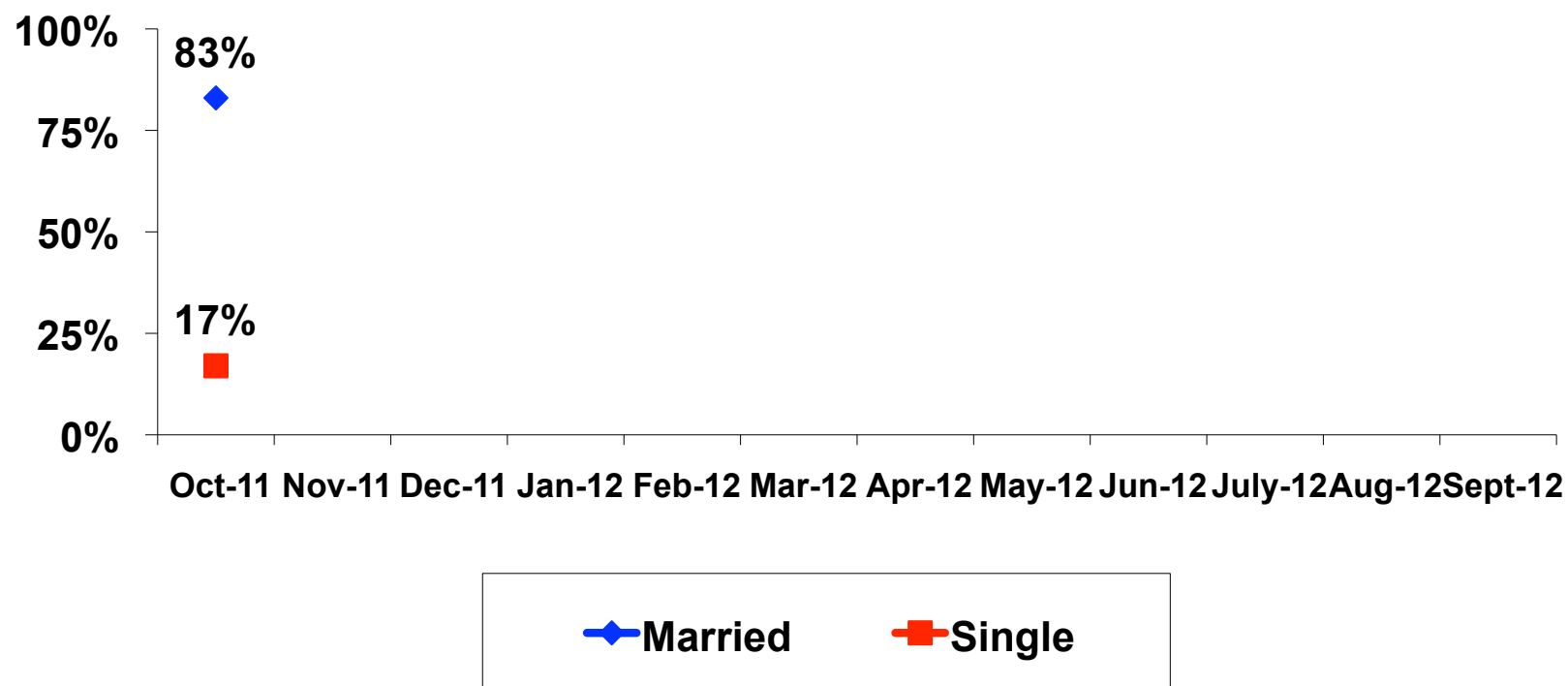
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

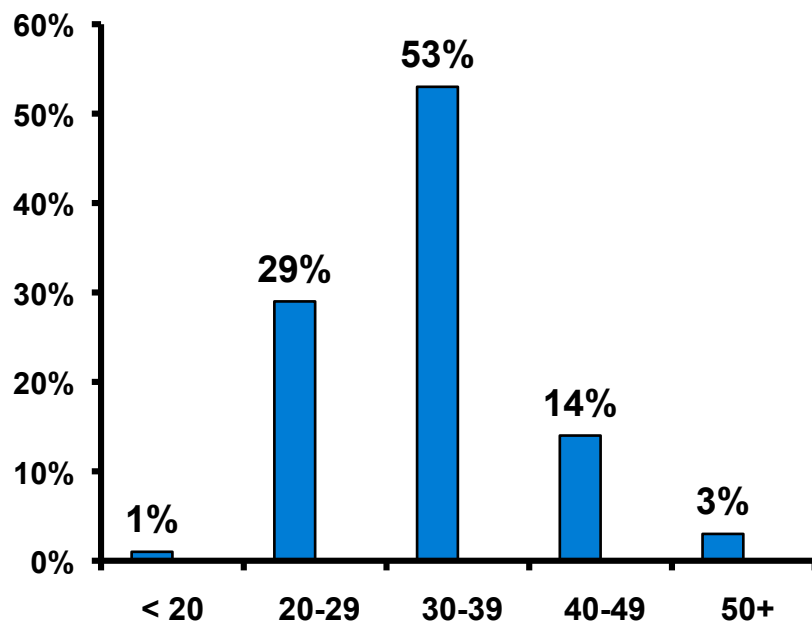


- A majority of visitors are married.

Marital Status Tracking



Age - Overall

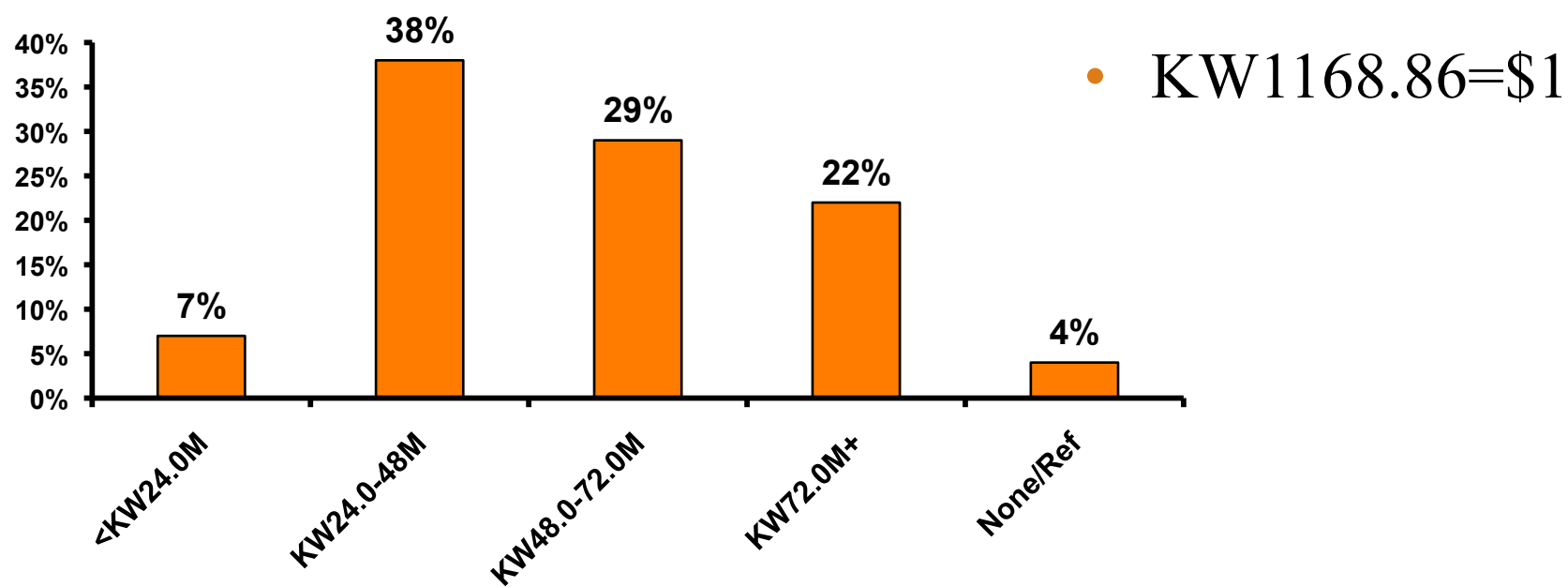


- The average age of the respondents is 33.5 years of age.

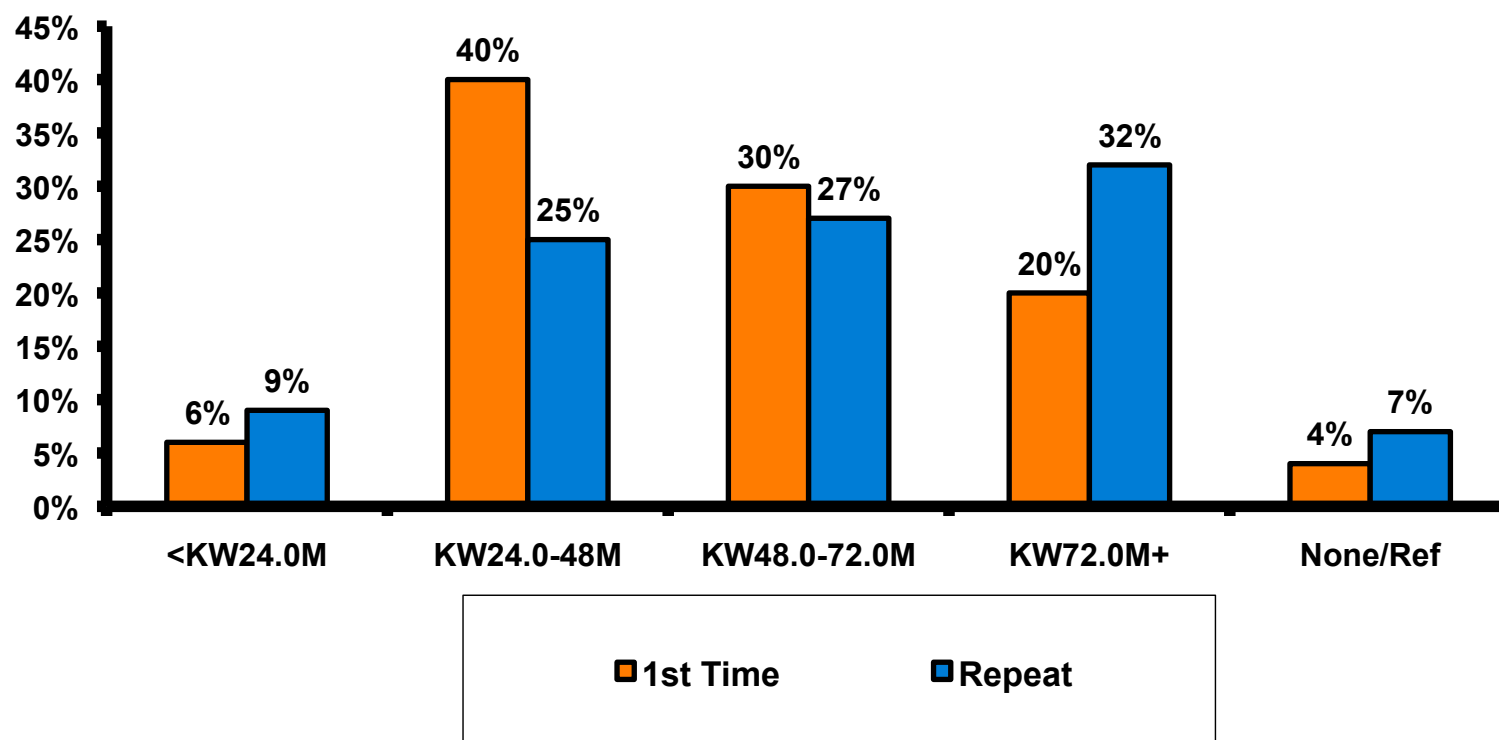
Average Tracking



Personal Income



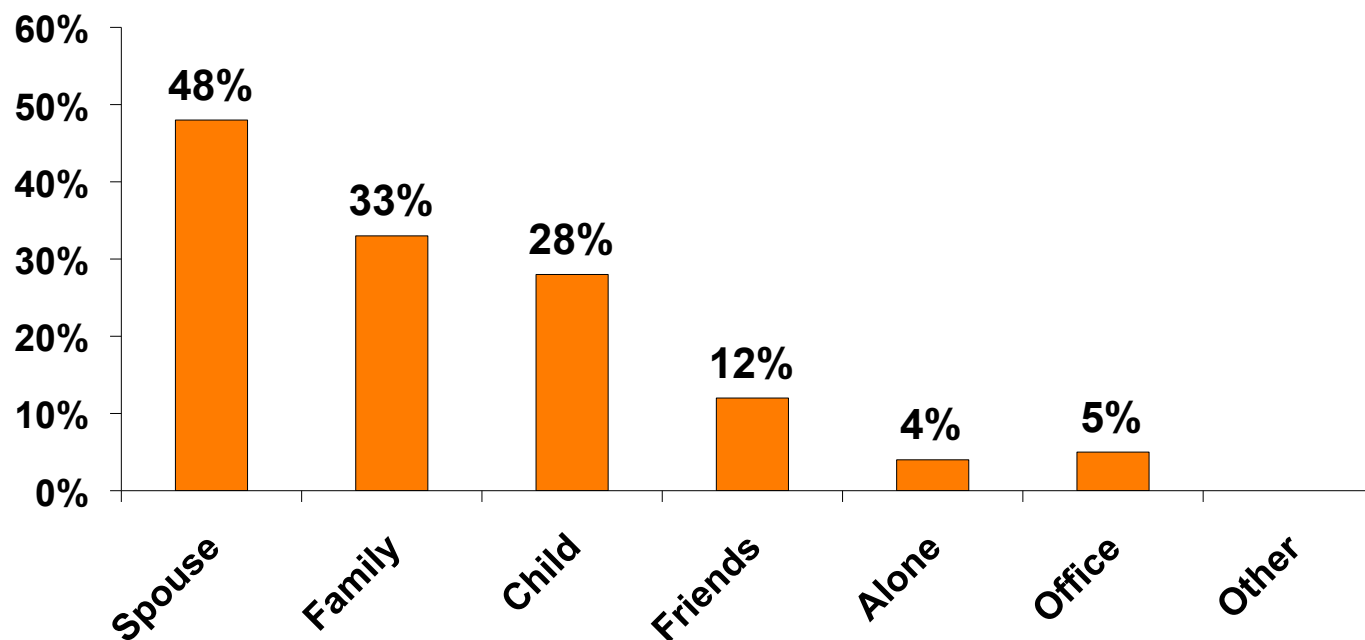
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE				
				Male	Female	<20	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	23	8	15		15	7	1	
			7%	5%	9%		16%	4%	2%	
	KW24.0M-KW48.0M	Count	131	55	76		48	70	9	4
			38%	32%	45%		50%	38%	18%	44%
	KW48.0M-KW72.0M	Count	101	63	38	1	20	56	22	2
			29%	36%	22%	50%	21%	30%	44%	22%
	KW72.0M+	Count	74	39	35		7	47	17	3
			22%	23%	21%		7%	25%	34%	33%
	Refused	Count	14	8	6	1	6	6	1	
			4%	5%	4%	50%	6%	3%	2%	
Total	Count		343	173	170	2	96	186	50	9

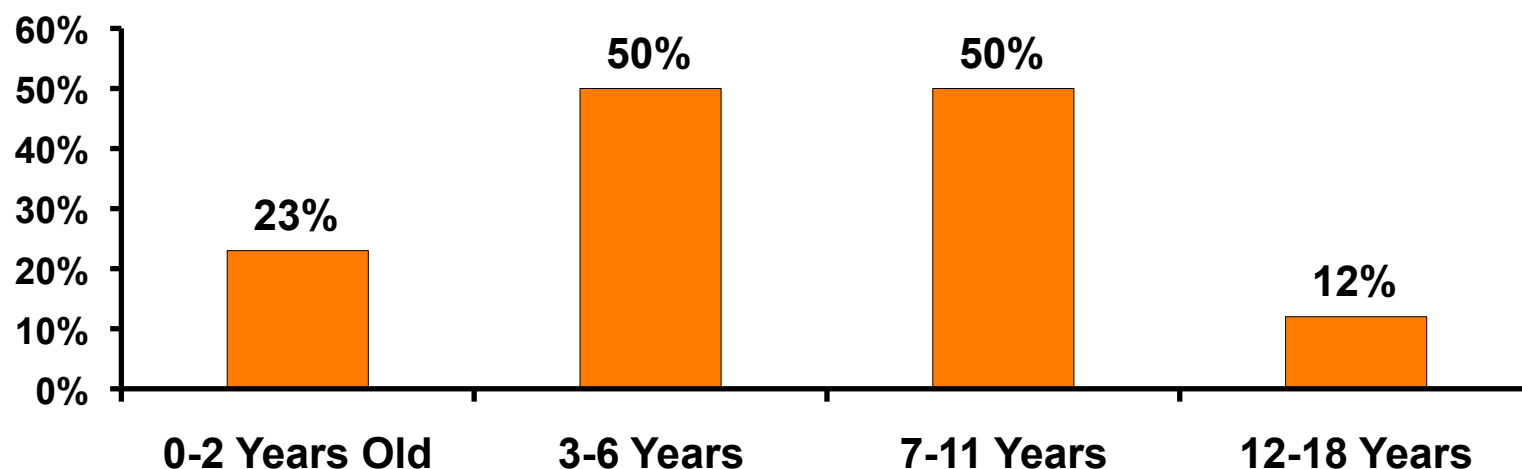
Travel Companions



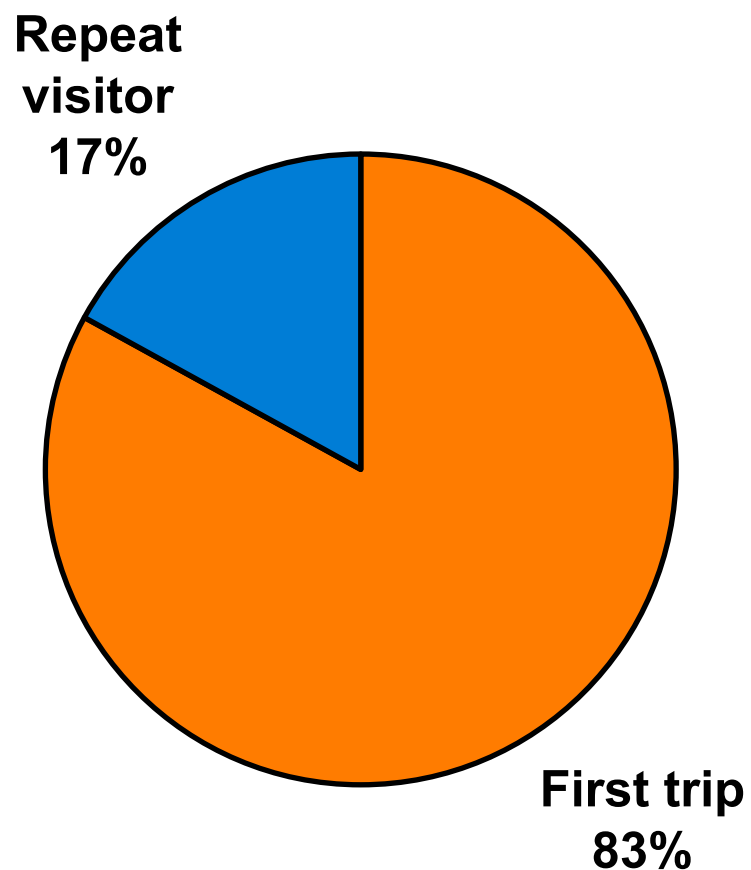
Number of Children Travel Party

N=100 total respondents traveling with children.

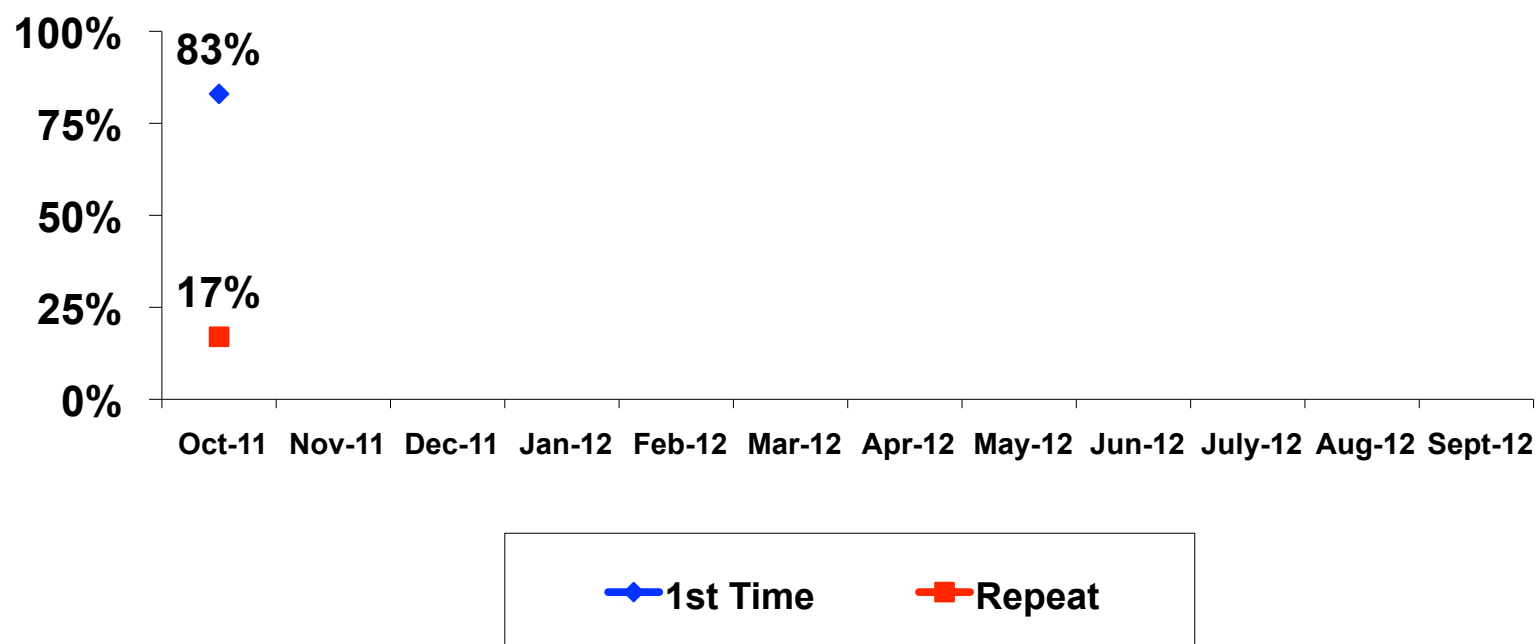
(Of those N=100 respondents, there is a total of 161 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



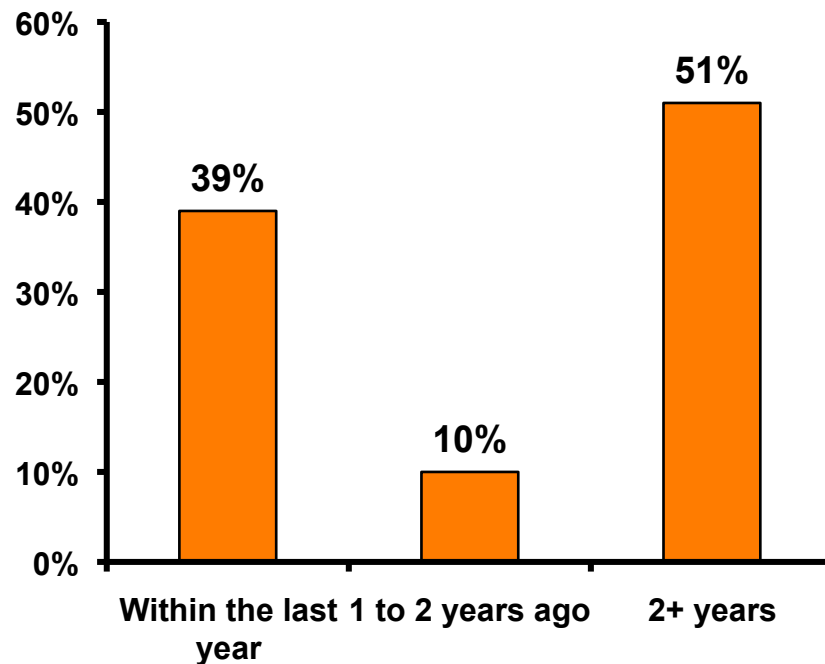
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	176	147	29
			50%	51%	48%
	Female	Count	176	143	31
			50%	49%	52%
Total	Count		352	290	60
AGE	<20	Count	2		2
			1%		3%
	20-29	Count	102	90	10
			29%	31%	17%
	30-39	Count	188	160	28
			53%	55%	47%
	40-49	Count	50	35	15
			14%	12%	25%
	50+	Count	10	5	5
			3%	2%	8%
	Total	Count	352	290	60

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

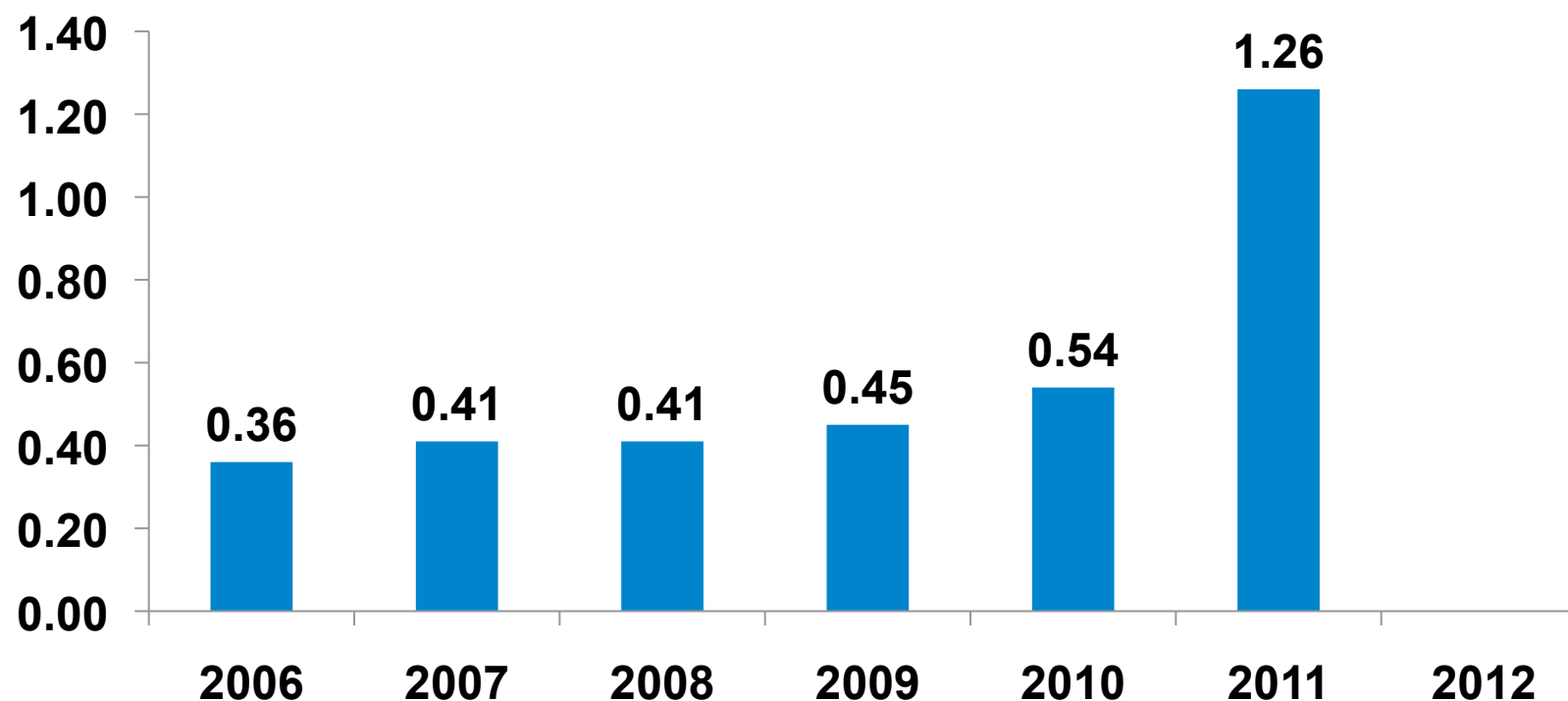
Repeat Visitors Last Trip

n = 59



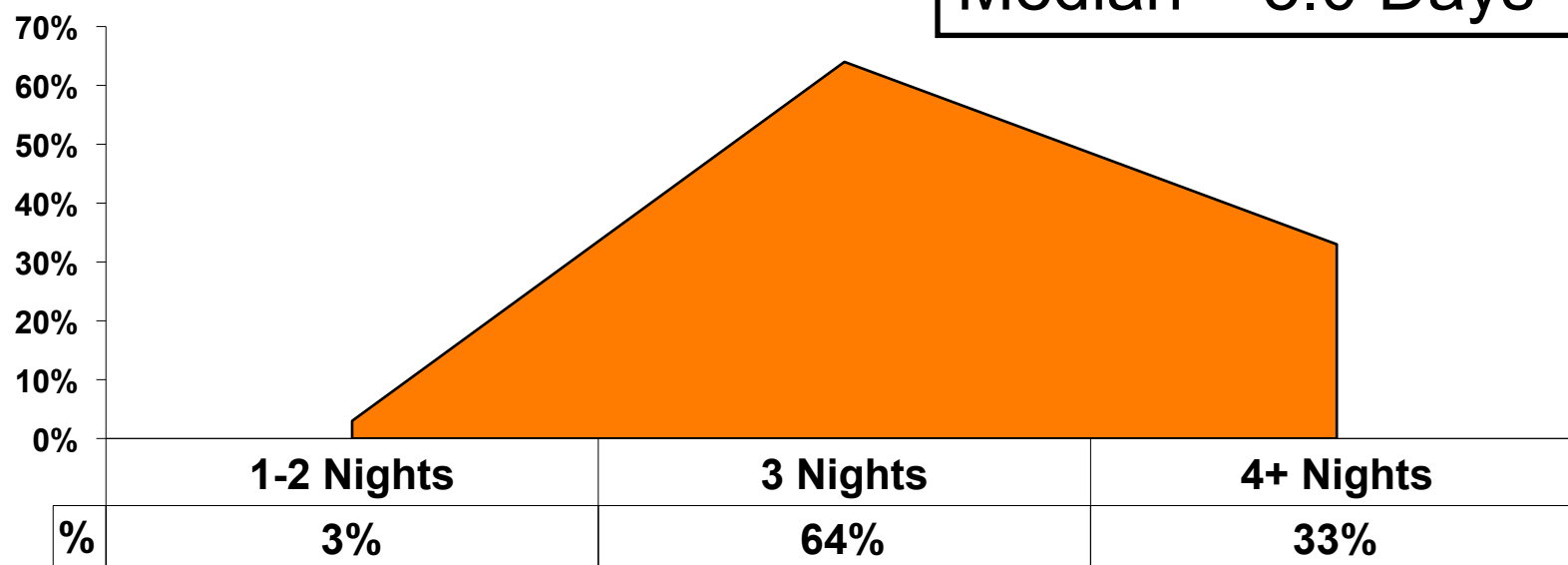
- The average repeat visitor has been to Guam 2.7 times.
- Half the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2006-2012) (2 nights or more)

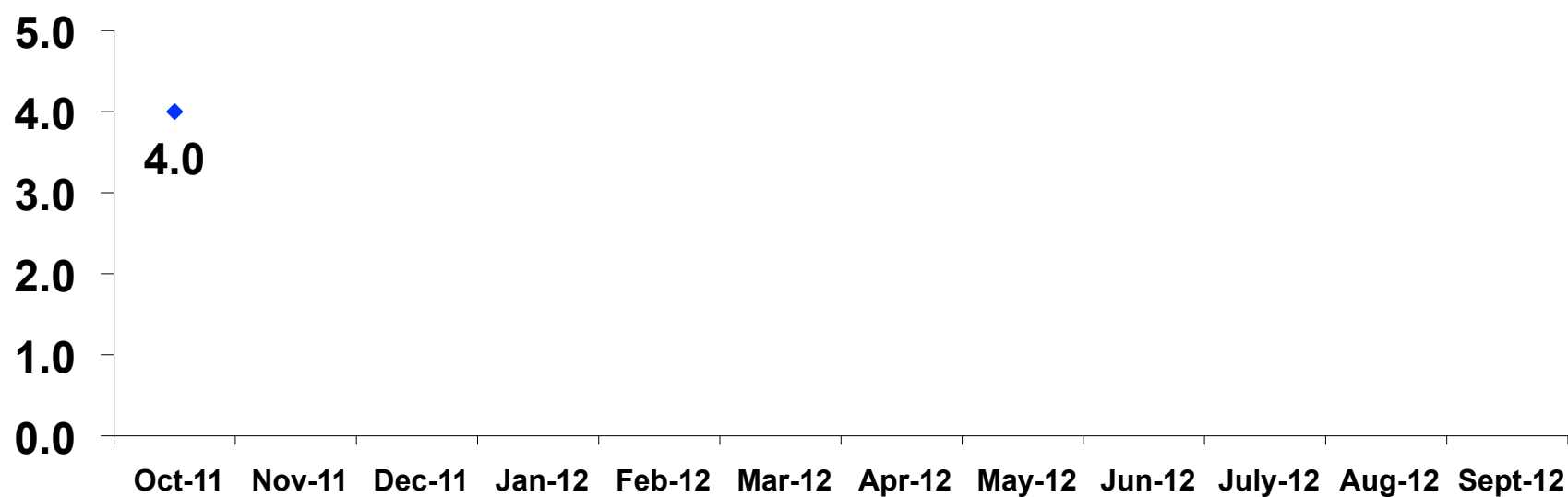


Length of Stay

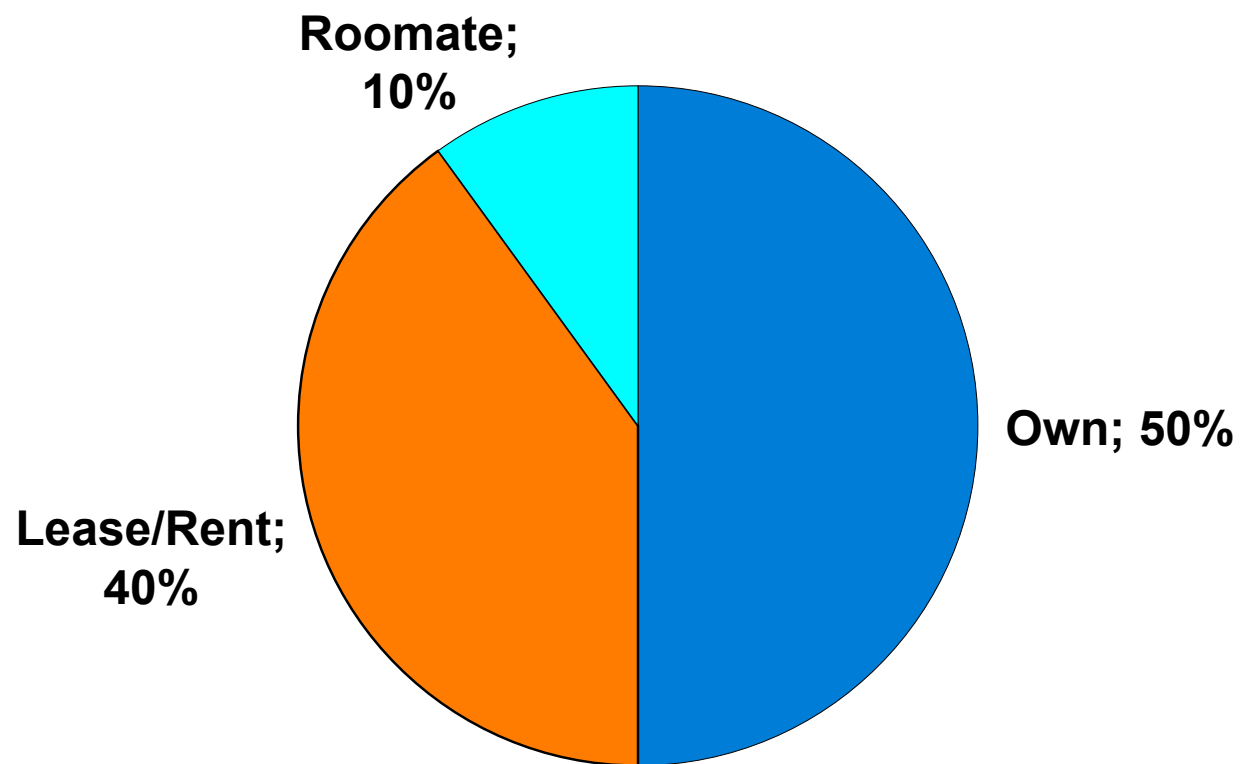
Mean = 4.00 Days
Median = 3.0 Days



Average Length of Stay



Living Accommodations

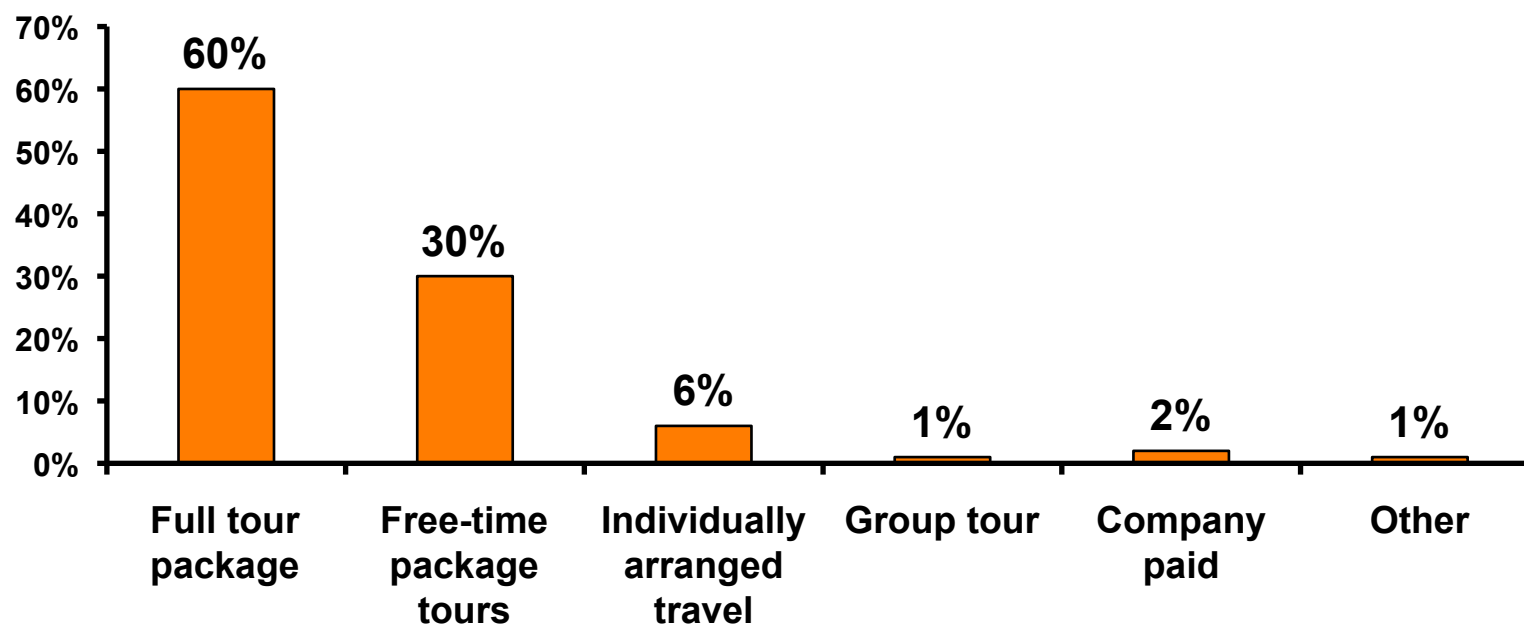


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	30%	22%	30%	34%	32%	
	Self-employed	16%	13%	14%	14%	19%	29%
	Prof/Specialist/Tech	14%	13%	15%	13%	19%	
	Homemaker	12%	13%	12%	11%	12%	14%
	Service worker	4%	9%	6%	4%	1%	
	Professor/Teacher	4%		8%	4%		
	Manager	3%	4%	3%	4%	4%	
	Skilled worker	3%		2%	4%	3%	7%
	Unemployed	3%	4%	2%	1%		29%
	Student	2%	9%		1%		21%
	Govt-Exec	2%		1%	3%	3%	
	Other	2%		1%	3%	3%	
	Sales/Clerical	1%		1%	2%	3%	
	Govt - Office/non-mgr	1%	4%	3%			
	Govt-Mgr	1%		2%			
	Free-lancer	1%	9%	1%			
	Judicial	1%			1%	1%	
Total	Count	347	23	130	99	73	14

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

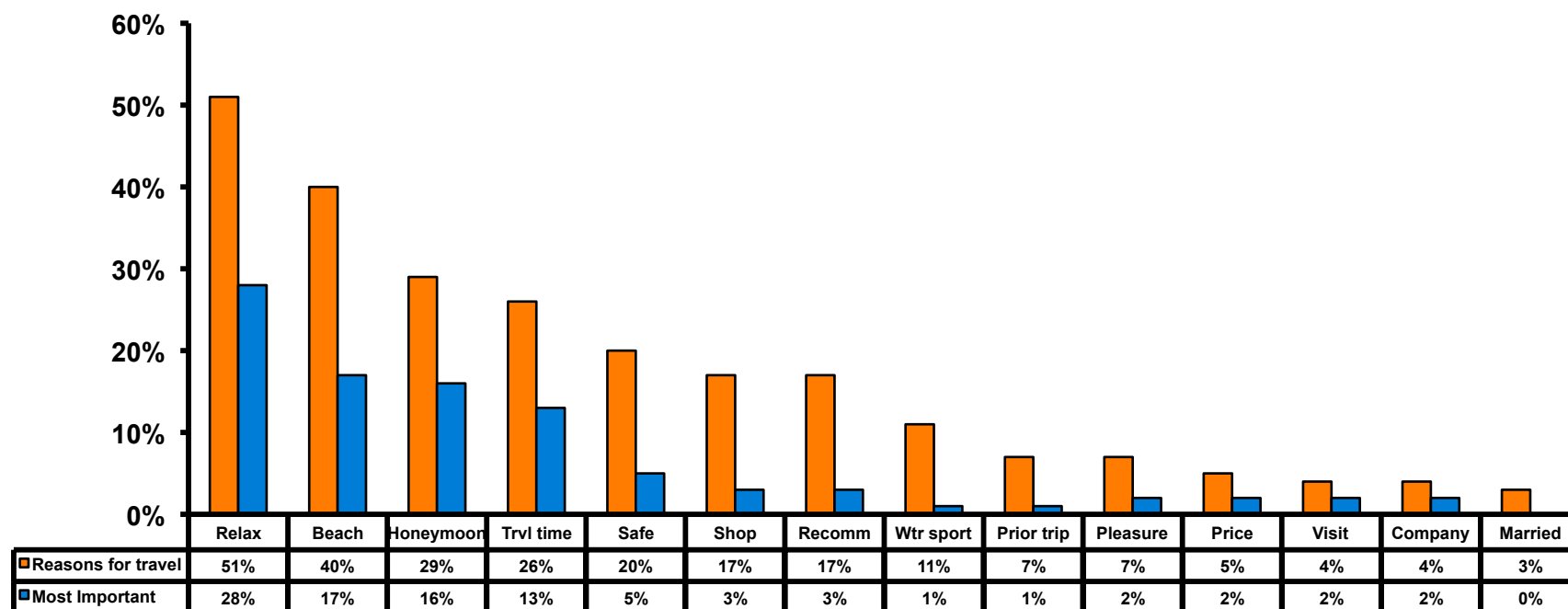


Accommodation by Income

Average length of stay: 4.00 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	49%	26%	44%	57%	62%	43%
	Hyatt Regency Guam	17%	22%	19%	13%	15%	21%
	Sheraton Laguna Resort	9%	4%	11%	8%	7%	
	The Westin Resort Guam	7%	13%	9%	5%	4%	7%
	Outrigger Guam Resort	6%	4%	7%	6%	4%	14%
	Hilton Guam Resort & Spa	3%	9%	2%	4%		
	Holiday Resort Guam	2%	4%	2%	2%	3%	
	Hotel Nikko Guam	2%		4%	1%	1%	
	Pacific Bay Hotel	1%	13%				7%
	Royal Orchid Guam	1%		1%	1%		7%
	Relatives, Friends, Home Stay	1%			1%	1%	
	Guam Marriott Resort Hotel	1%			1%	1%	
	Apartment	1%		1%		1%	
	Japan Plaza Hotel	0%			1%		
	Grand Plaza Hotel	0%		1%			
	Onward Beach Resort	0%		1%			
	Fiesta Resort Guam	0%	4%				
	Ramada Suites Guam	0%		1%			
Total	Count	352	23	131	101	74	14

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	20-29	30-39	40-49	50+	Male	Female
Q.5	Just to relax	51%		52%	48%	68%	20%	45%	57%
	Beautiful seas, beaches, tropical climate	40%		42%	38%	44%	60%	41%	40%
	Honeymoon	29%		44%	29%	4%		30%	28%
	Short travel time	26%		23%	31%	18%	20%	24%	28%
	It is a safe place to spend a vacation	20%		14%	22%	28%	10%	20%	20%
	Shopping	17%	50%	22%	16%	12%		14%	20%
	Recommendation of friend, relative, travel agency	17%		17%	15%	24%	10%	16%	18%
	Water sports	11%		11%	9%	22%		11%	11%
	A previous visit	7%	50%	4%	6%	18%	10%	7%	8%
	Pleasure	7%		10%	5%	6%	20%	4%	10%
	Price of the tour package	5%		4%	6%	6%		5%	6%
	To visit friends or relatives	4%	50%	6%	3%		30%	3%	6%
	My company sponsored me	4%		3%	4%	6%		4%	3%
	To get married or Attend wedding	3%		3%	3%		10%	1%	4%
	SCUBA diving	2%		3%	2%	2%	10%	3%	2%
	Company or Business trip	2%		3%	1%	2%	20%	3%	1%
	Promotional materials from GVB	1%		1%	2%	2%		2%	1%
	Organized Sporting Activity	1%		1%	2%	2%		1%	2%
	Other	1%			2%	2%		2%	
	Special promotion	1%		2%		2%		1%	1%
	Career certification or testing	1%		2%	1%			1%	1%
	To golf	0%				2%		1%	
Total	Cases	352	2	102	188	50	10	176	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	51%	39%	47%	55%	54%	57%
	Beautiful seas, beaches, tropical climate	40%	39%	38%	39%	43%	50%
	Honeymoon	29%	35%	40%	24%	12%	43%
	Short travel time	26%	17%	24%	29%	32%	7%
	It is a safe place to spend a vacation	20%	13%	23%	19%	23%	7%
	Recommendation of friend, relative, travel agency	17%	9%	14%	20%	20%	29%
	Shopping	17%	22%	20%	15%	15%	7%
	Water sports	11%		6%	15%	18%	7%
	A previous visit	7%	9%	5%	8%	12%	
	Pleasure	7%		8%	9%	7%	
	Price of the tour package	5%	4%	6%	2%	8%	14%
	To visit friends or relatives	4%	9%	4%	2%	4%	14%
	My company sponsored me	4%		2%	6%	7%	
	To get married or Attend wedding	3%	9%	2%	3%		
	SCUBA diving	2%		2%	2%	4%	
	Company or Business trip	2%	4%	2%	4%		
	Promotional materials from GVB	1%		2%	3%		
	Organized Sporting Activity	1%		2%	1%	1%	
	Other	1%			2%	3%	
	Special promotion	1%			2%		7%
	Career certification or testing	1%		1%	1%		
To golf	0%			1%			
Total	Cases	352	23	131	101	74	14

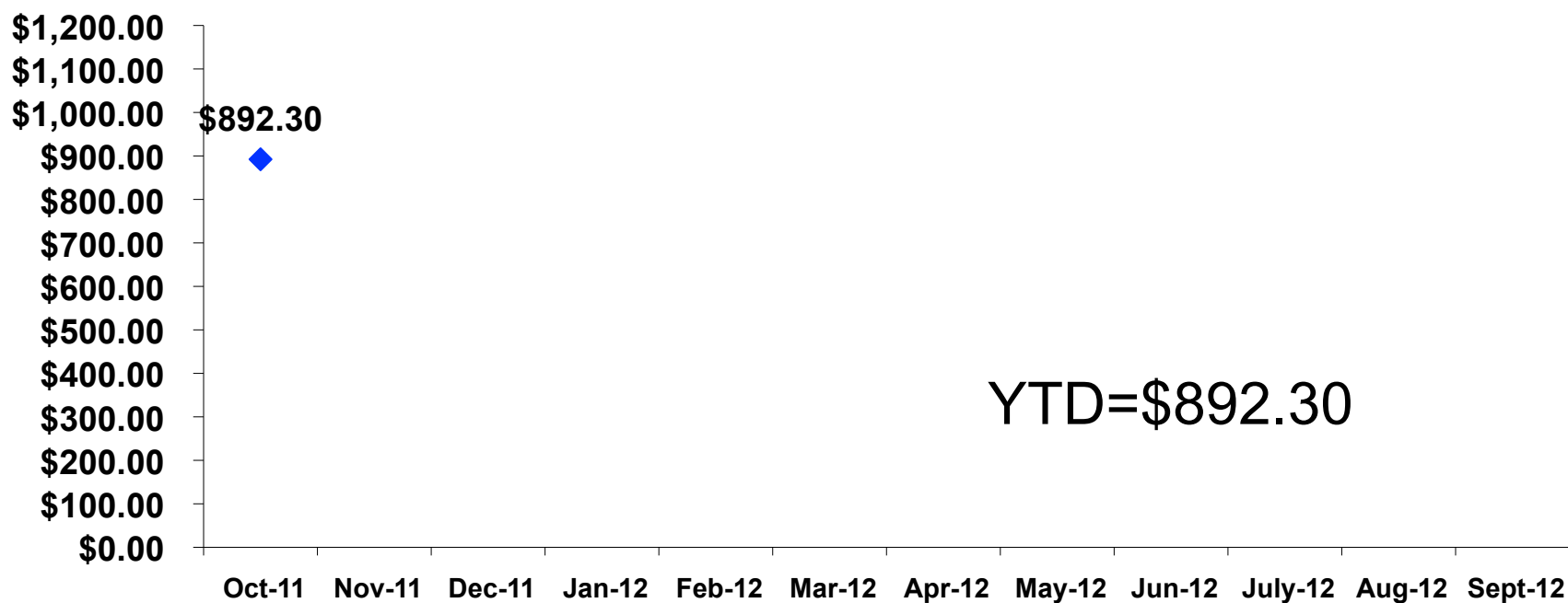
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1168.86/US\$1

- \$1,923.90 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$7,699 = maximum (highest amount recorded for the entire sample)
- \$892.30 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



Breakdown of Prepaid Expenditures

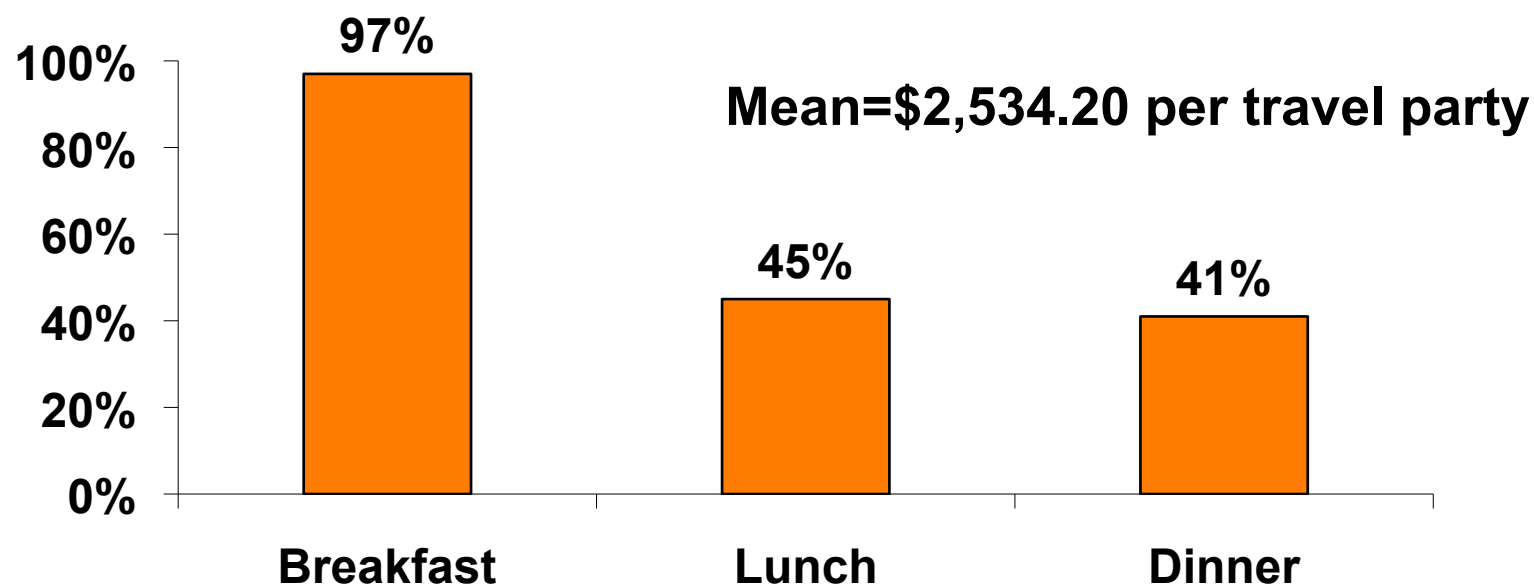
KW1168.86=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$1,989.60
Air & Accommodation w/ daily meal package	\$2,534.20
Air only	\$751.20
Accommodation only	\$1,565.60
Accommodation w/ daily meal only	\$958.20
Food & Beverages in Hotel	\$6.40
Ground transportation- Korea	\$111.00
Ground transportation- Guam	\$69.20
Optional tours/ activities	\$223.40
Other expenses	\$407.70
Total Prepaid	\$1,923.90

Prepaid Meal Breakdown

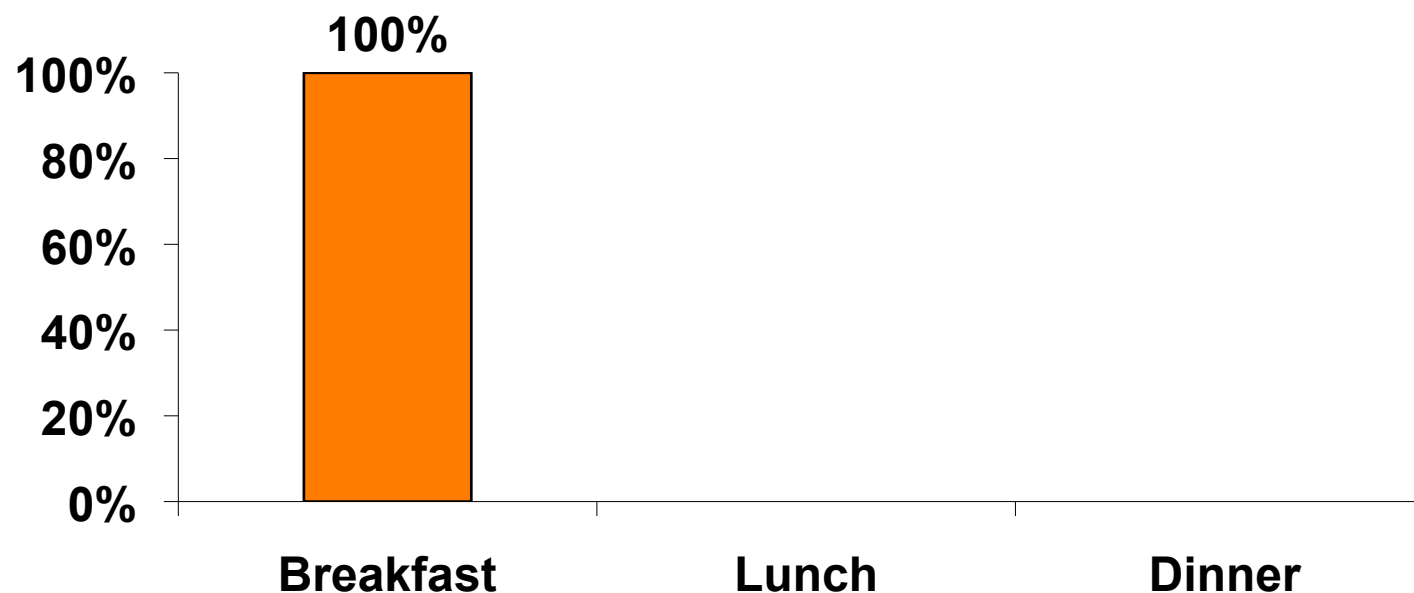
Air/ Accommodations with Daily Meal Package
n=198



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

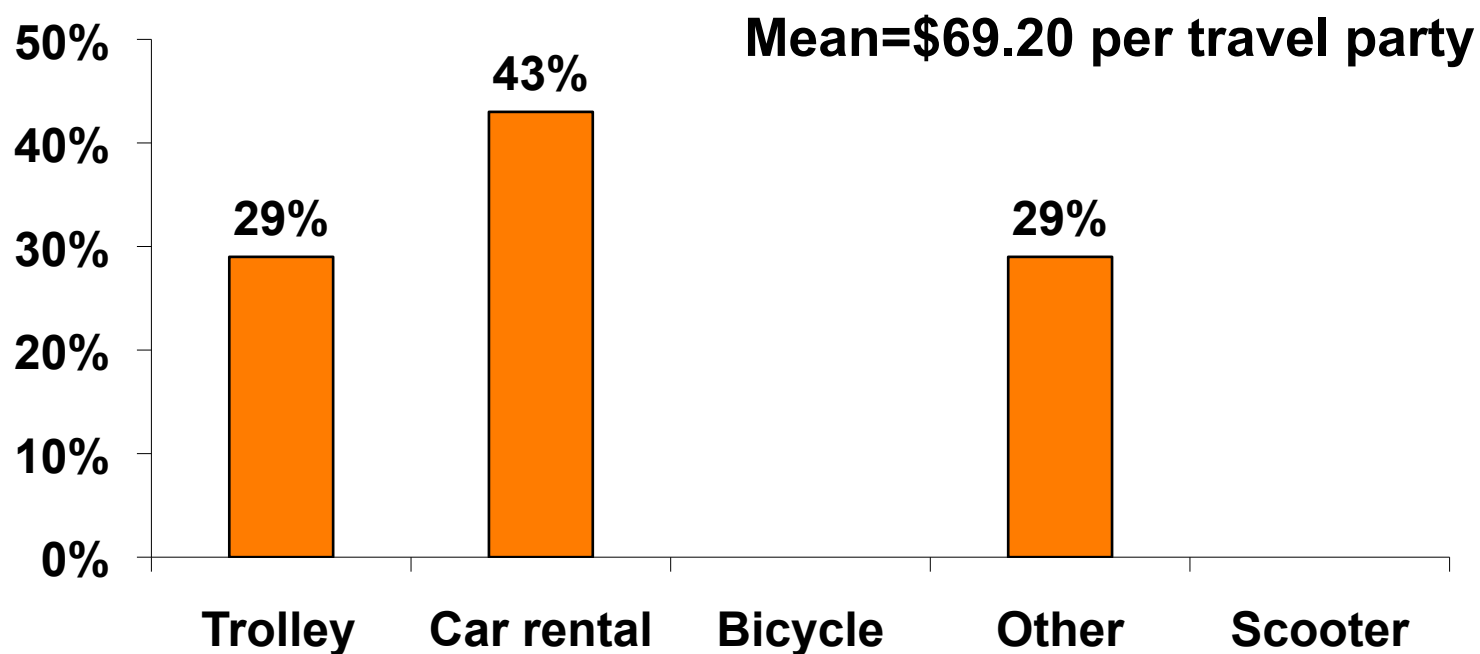
n= 5



Mean= \$958.20 per travel party

Prepaid Ground Transportation

n=7



On-Island Expenditures

- \$913.70 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,500 = Maximum (highest amount recorded for the entire sample)
- \$426.90 = overall mean average per person on-island expenditure

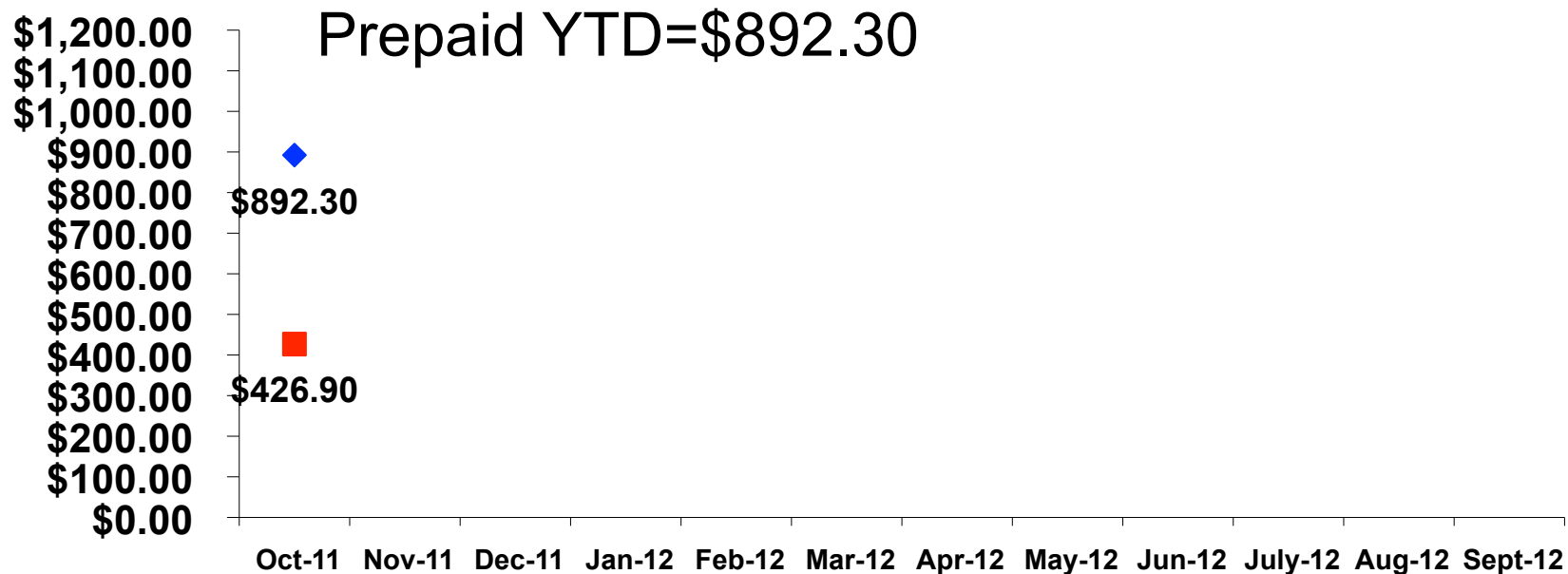
On-Island Expenditures Per Person



Prepaid/ On-Island Expenditures Per Person

On-Island YTD = \$426.90

Prepaid YTD=\$892.30



◆ Prepaid

■ On-isle

Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER								
			Male	Female	Male					Female			
					AGE					AGE			
					<20	20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$913.66	\$988.78	\$838.54	\$715.00	\$1,024.28	\$966.14	\$831.23	\$2,113.33	\$766.94	\$869.71	\$1,065.40	\$357.50
	Median	\$550	\$600	\$500	\$715	\$800	\$600	\$560	\$90	\$466	\$600	\$1,000	\$215

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE				
			Male	Female	<20	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$36.35	\$61.69	\$11.01	\$0.00	\$8.75	\$48.61	\$55.29	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$24.56	\$32.61	\$16.51	\$100.00	\$19.75	\$29.50	\$17.68	\$0.00
	Median	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$32.13	\$34.09	\$30.18	\$50.00	\$22.84	\$36.09	\$39.92	\$10.00
	Median	\$0	\$0	\$0	\$50	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$104.43	\$108.43	\$100.43	\$0.00	\$105.64	\$97.23	\$154.08	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$216.23	\$246.63	\$185.84	\$450.00	\$186.15	\$240.41	\$202.60	\$90.00
	Median	\$0	\$0	\$0	\$450	\$0	\$0	\$20	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$112.45	\$117.81	\$107.09	\$100.00	\$120.73	\$120.40	\$80.66	\$40.00
	Median	\$0	\$0	\$0	\$100	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$20.25	\$17.59	\$22.91	\$10.00	\$15.96	\$19.74	\$34.40	\$5.00
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$364.28	\$369.94	\$358.63	\$5.00	\$369.25	\$325.22	\$335.05	\$1,266.00
	Median	\$30	\$0	\$40	\$5	\$35	\$20	\$32	\$15
TOTAL ON ISLAND	Mean	\$913.66	\$988.78	\$838.54	\$715.00	\$867.85	\$917.41	\$901.48	\$1,411.00
	Median	\$550	\$600	\$500	\$715	\$500	\$600	\$580	\$105

On-Island Expenditures

First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$15.35	\$139.05
	Median	\$0	\$0
F&B-FF	Mean	\$18.74	\$53.50
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$32.52	\$31.33
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$111.17	\$74.25
TOUR	Median	\$0	\$0
GIFT/	Mean	\$214.36	\$231.17
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$113.46	\$110.80
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$15.58	\$43.17
	Median	\$0	\$0
OTHER EXP	Mean	\$388.95	\$251.83
	Median	\$30	\$0
TOTAL ON	Mean	\$913.77	\$934.93
ISLAND	Median	\$590	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,319.20 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person

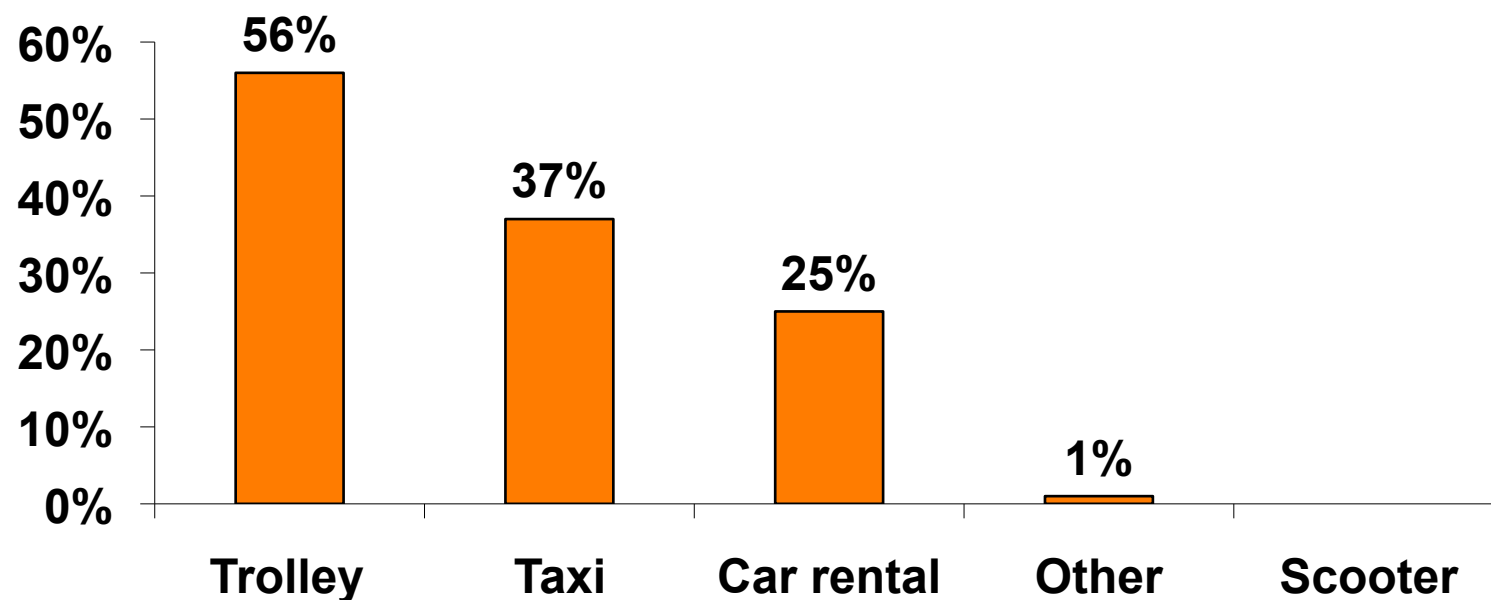


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$36.30
Food & beverage in fast food restaurant/ convenience store	\$24.60
Food & beverage at restaurants or drinking establishments outside a hotel	\$32.10
Optional tours and activities	\$104.40
Gifts/ souvenirs for yourself/companions	\$216.20
Gifts/ souvenirs for friends/family at home	\$112.40
Local transportation	\$20.30
Other expenses not covered	\$364.30
Average Total	\$913.70

Local Transportation

n=89



Mean=\$20.30 per travel party

Guam Airport Expenditures

- \$59.10 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,200 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

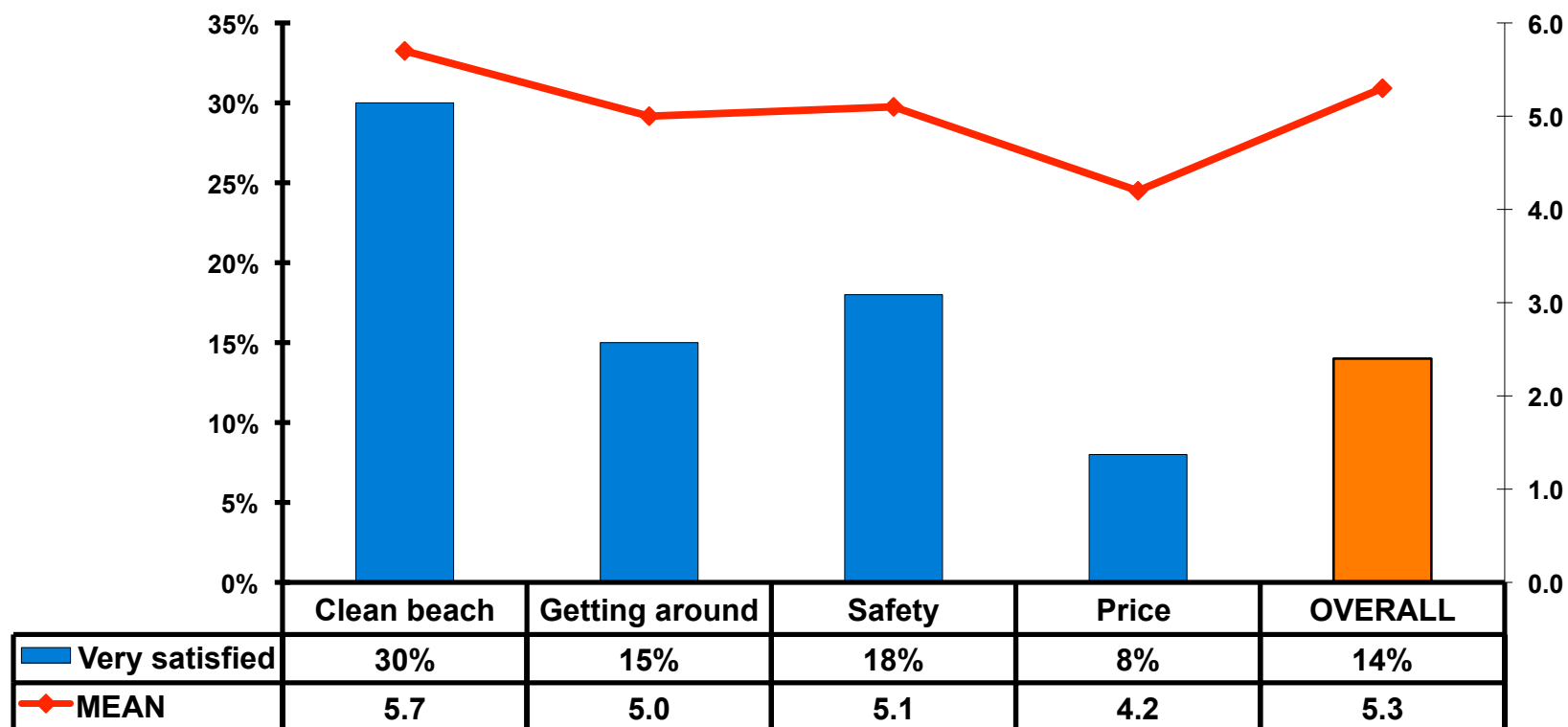
	MEAN \$
Food & Beverages	\$6.20
Gifts/Souvenirs Self	\$37.80
Gifts/Souvenirs Others	\$14.90
Total	\$59.10

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

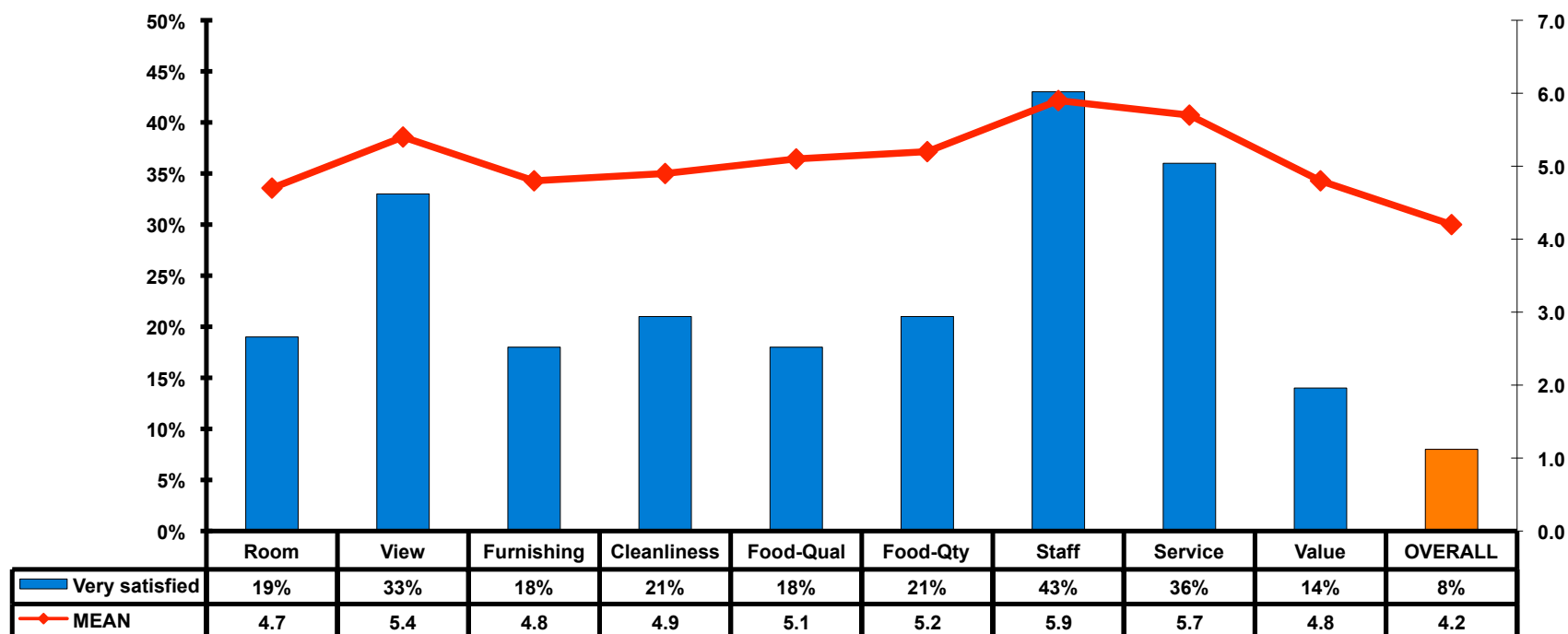
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

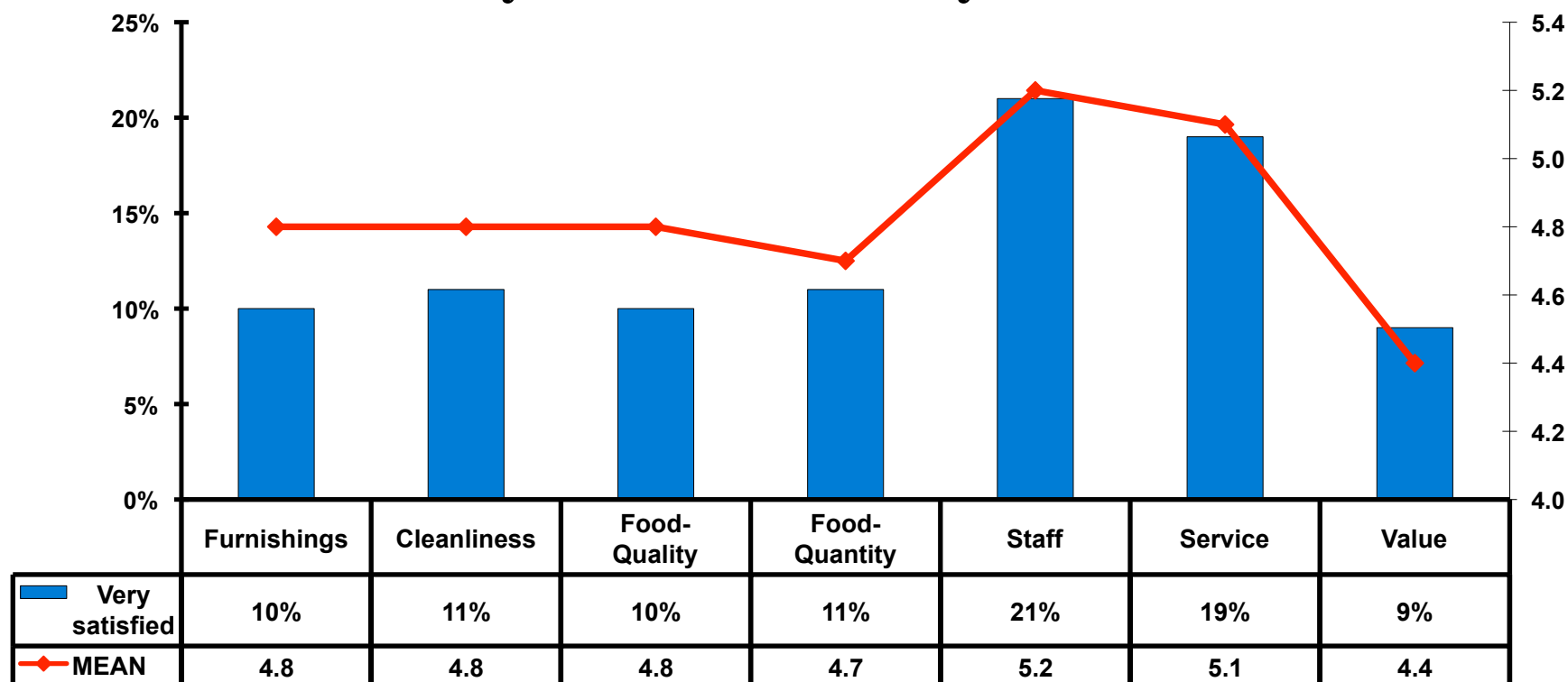
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

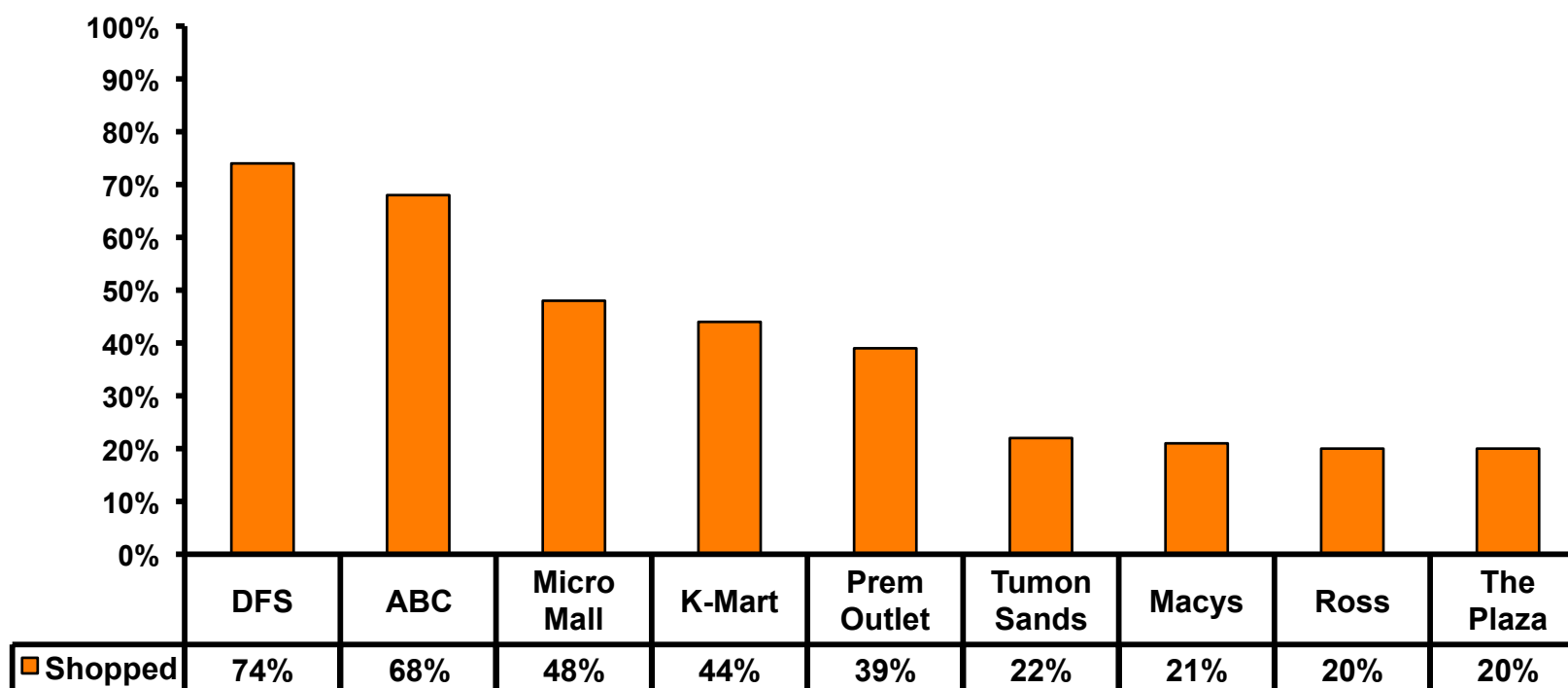
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

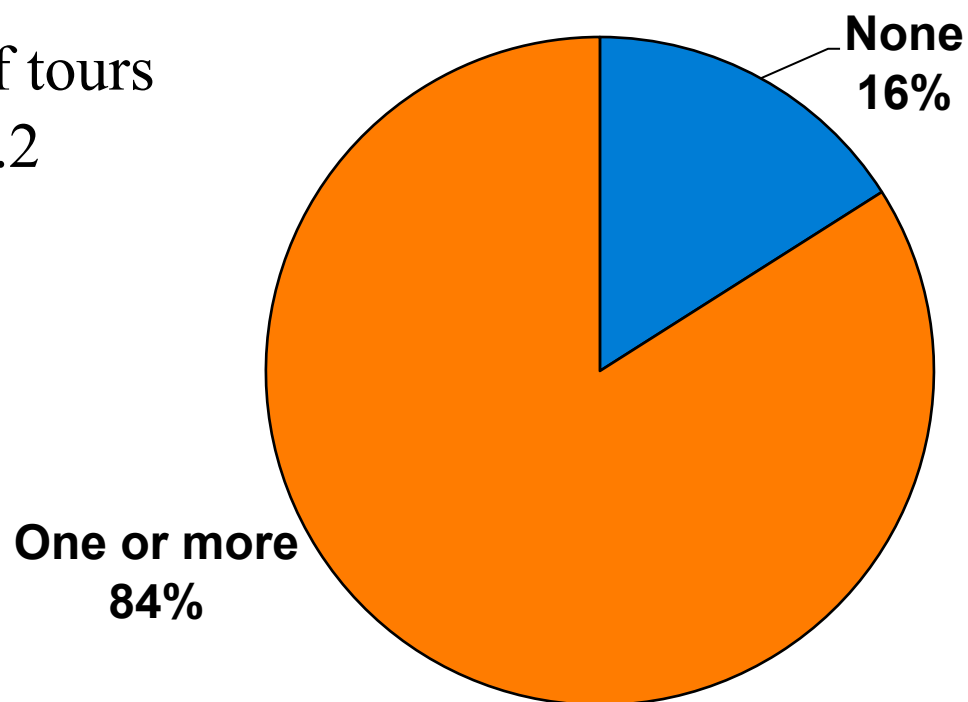
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 51%	Score of 6 to 7 = 46%
Score of 4 to 5 = 40%	Score of 4 to 5 = 42%
Score 1 to 3 = 9%	Score 1 to 3 = 13%
MEAN = 5.2	MEAN = 5.0

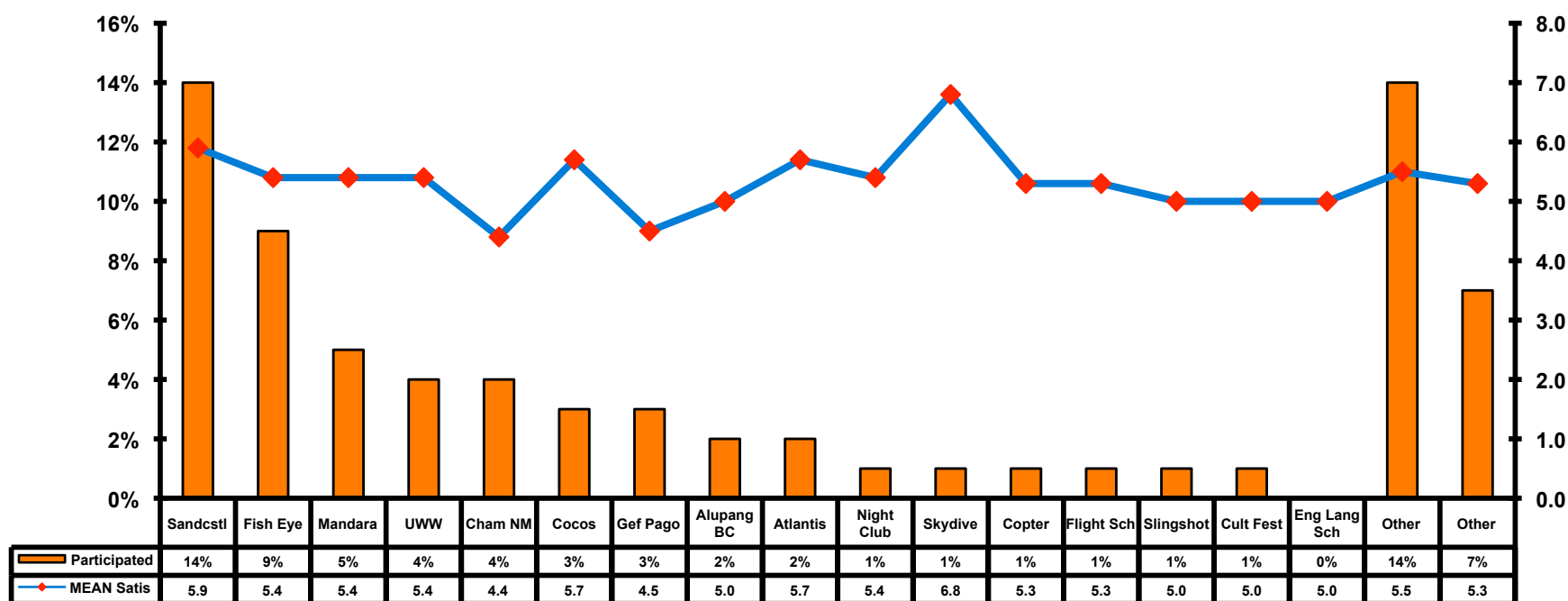
Optional Tour Participation

- Average number of tours participated in is 2.2



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 = 43%	Score of 6 to 7 = 35%
Score of 4 to 5 = 48%	Score of 4 to 5 = 53%
Score 1 to 3 = 9%	Score 1 to 3 = 12%
MEAN = 5.0	MEAN = 4.8

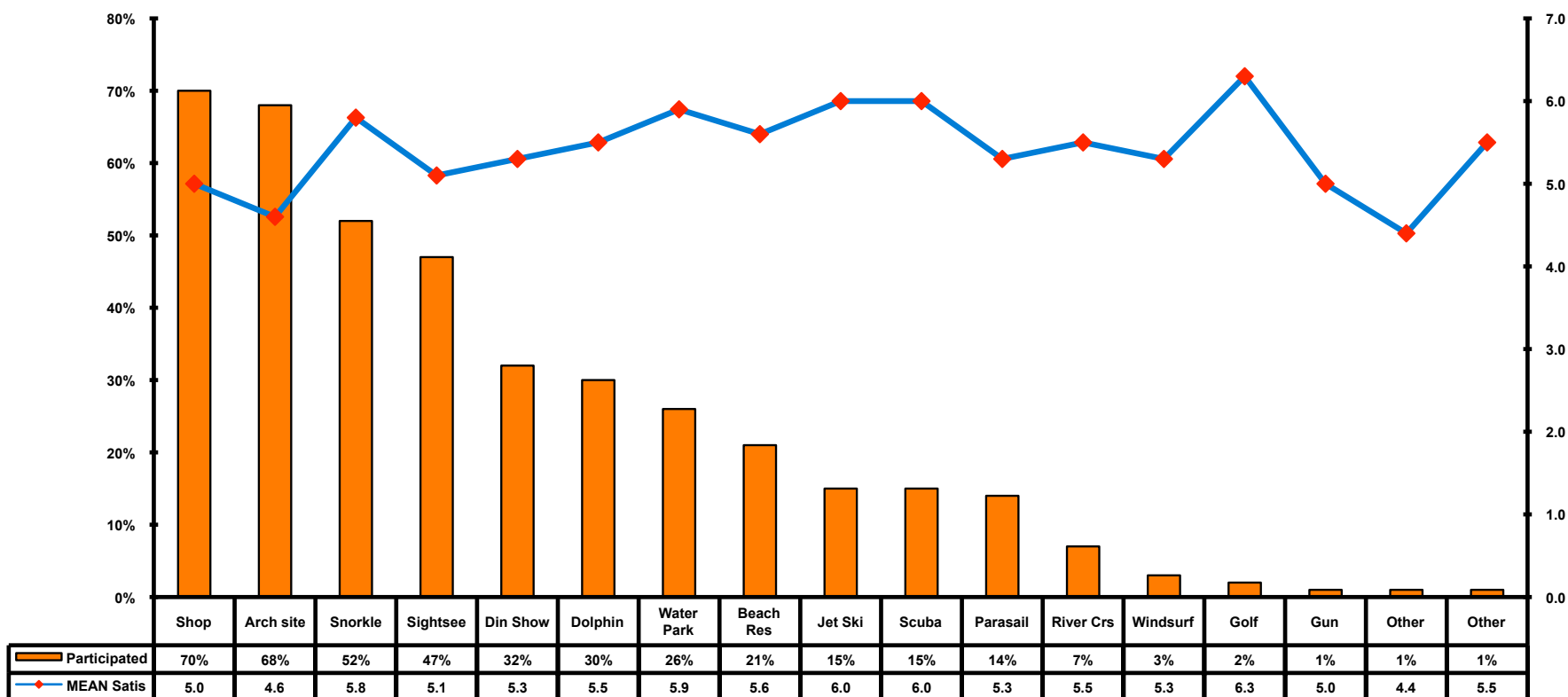
Night Tours Satisfaction

7pt Rating Scale

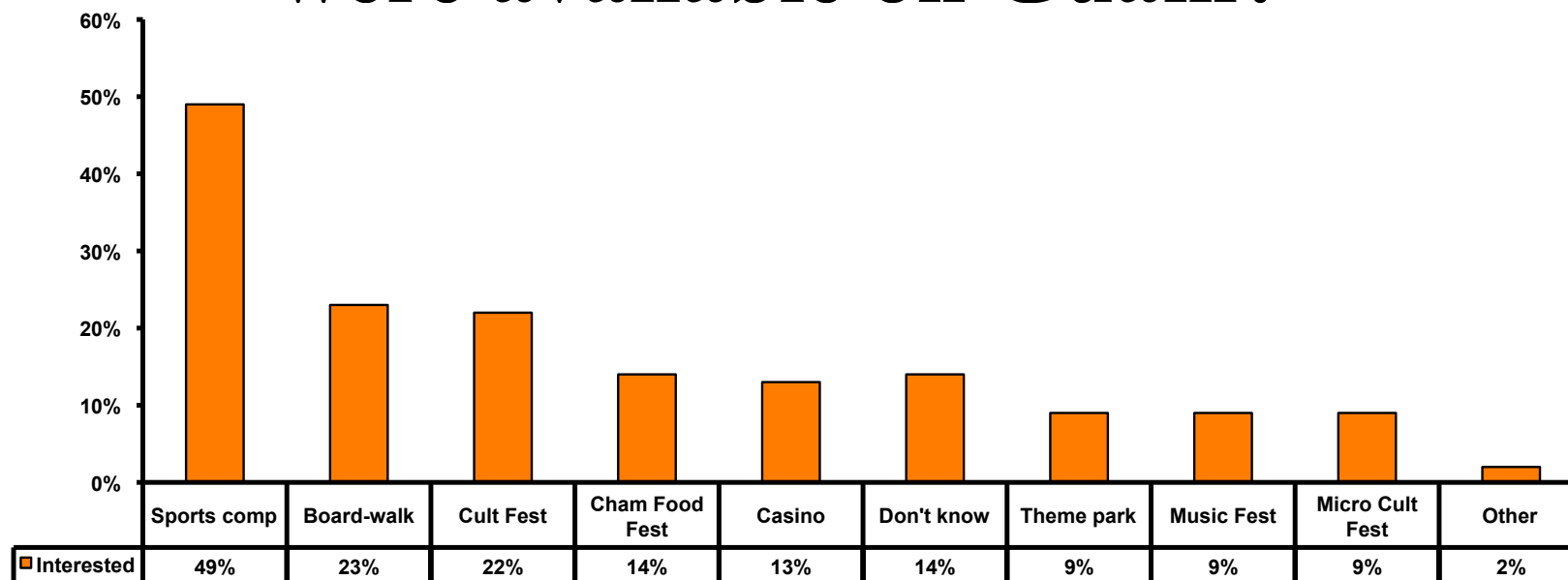
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 32%	Score of 6 to 7 = 29%
Score of 4 to 5 = 53%	Score of 4 to 5 = 53%
Score 1 to 3 = 16%	Score 1 to 3 = 19%
MEAN = 4.6	MEAN = 4.4

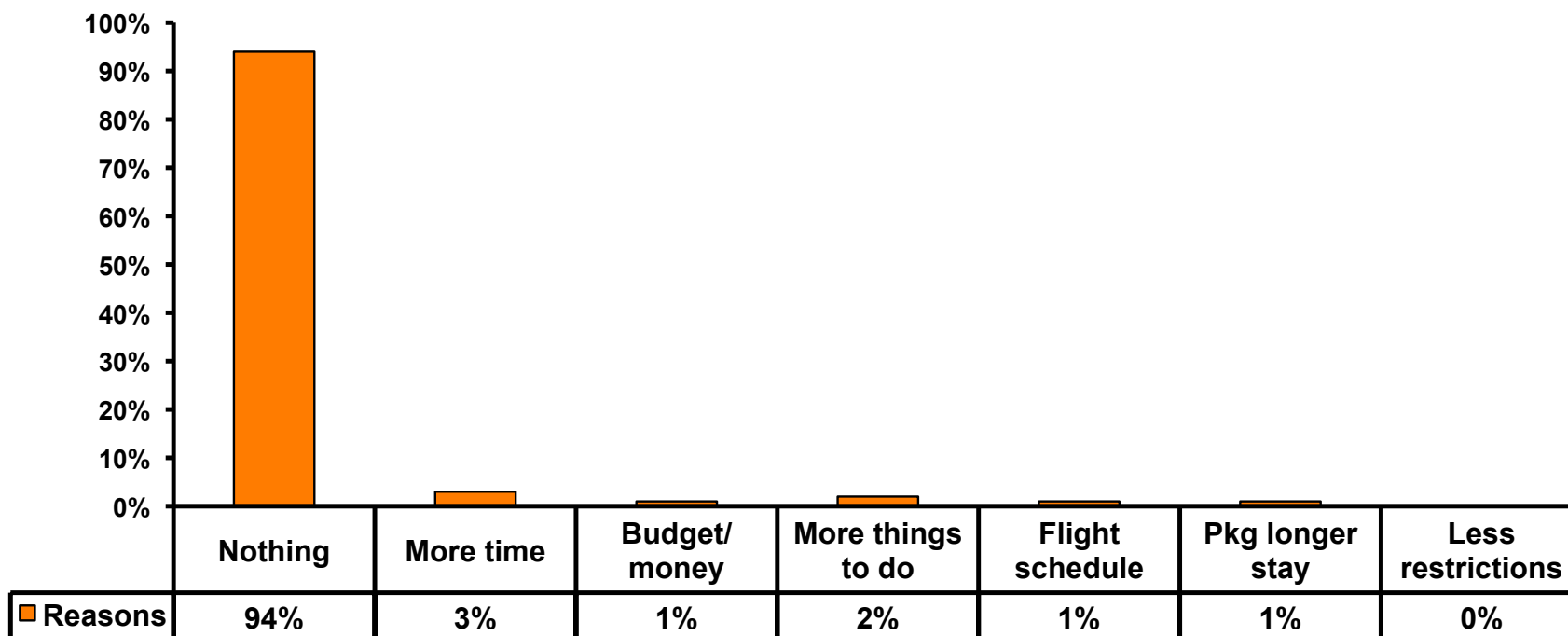
Satisfaction with Other Activities



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



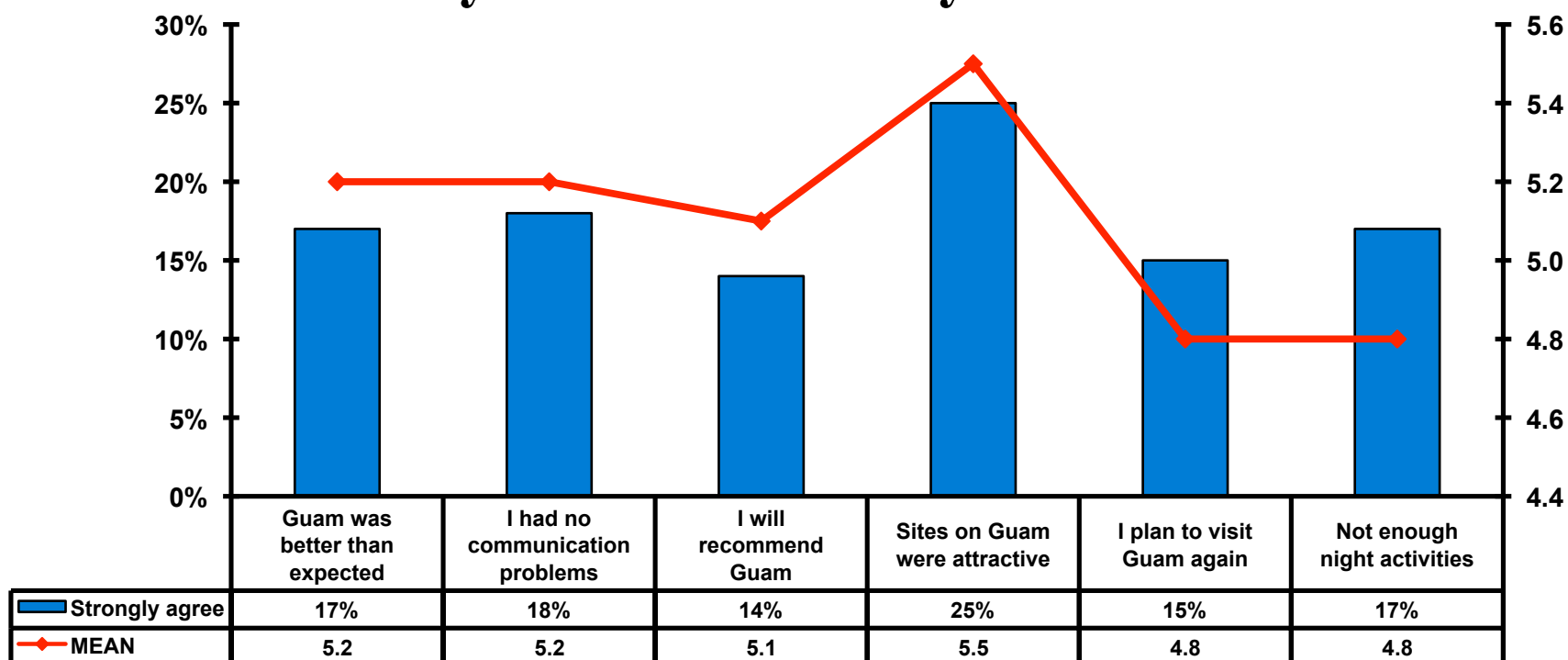
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

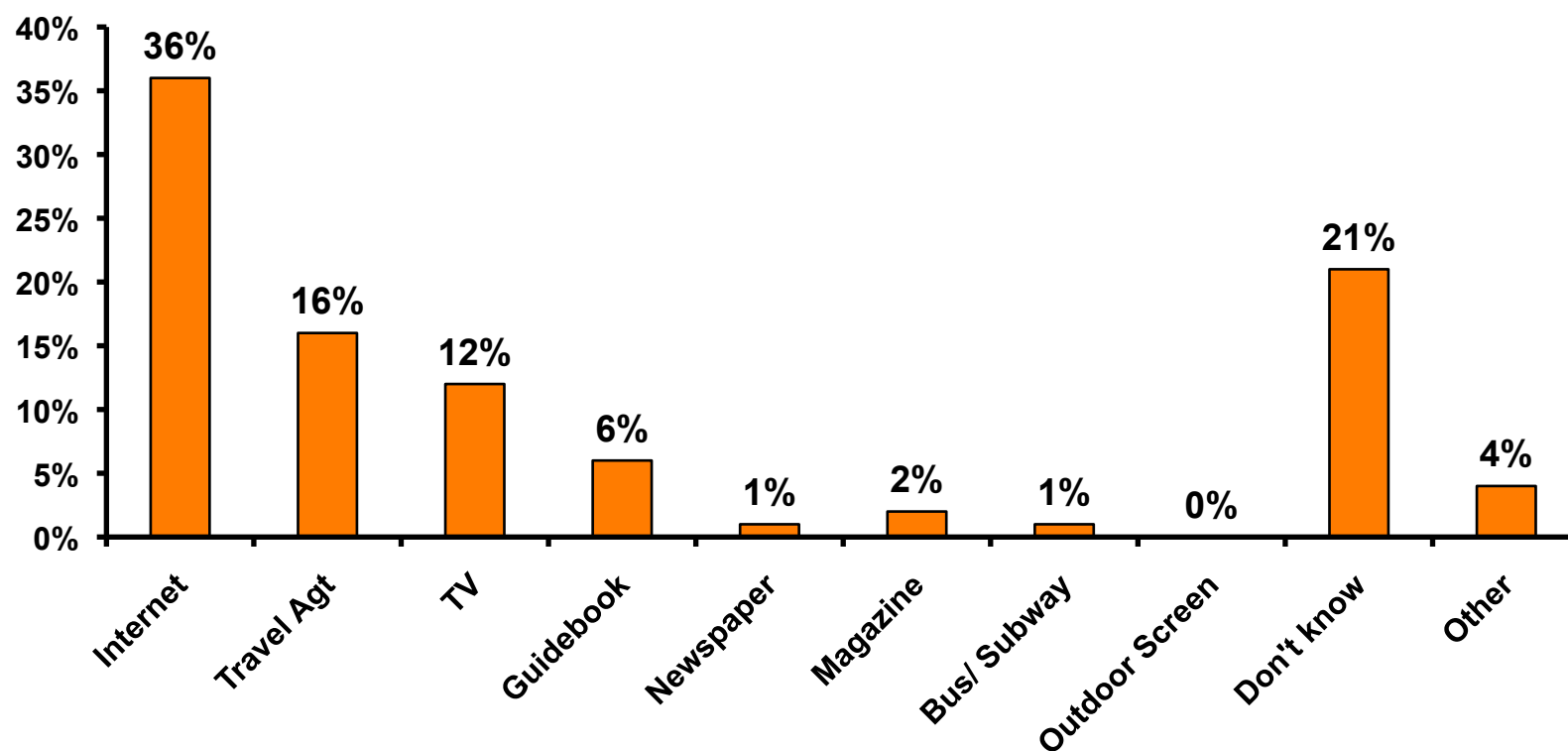
7=Very Satisfied/ 1=Very Dissatisfied



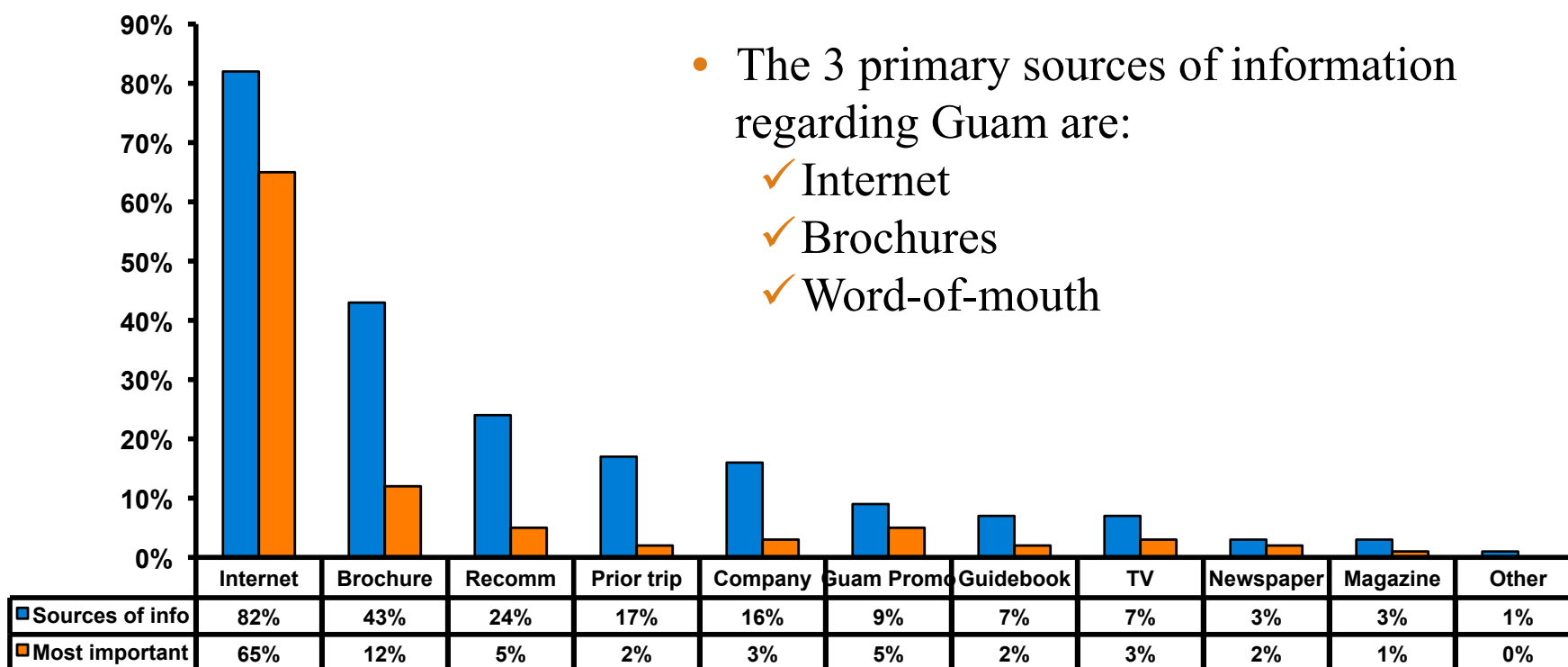
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

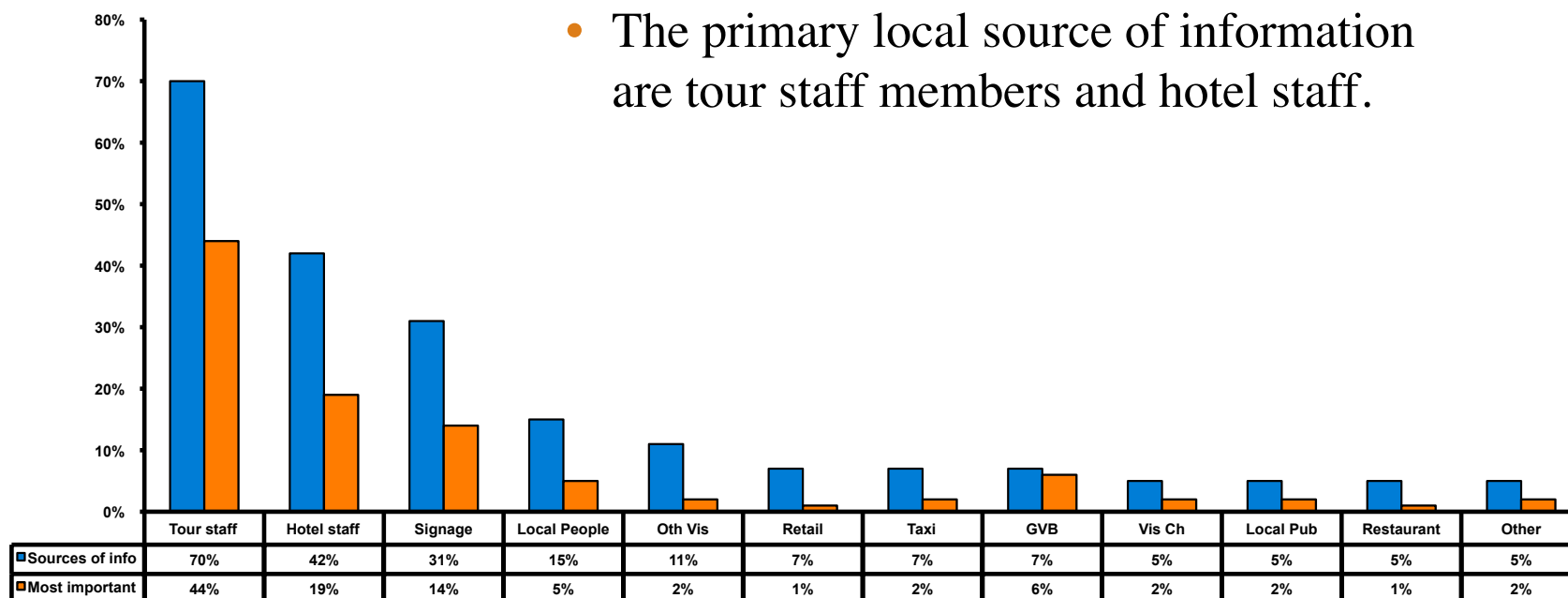


Sources of Information Pre-arrival



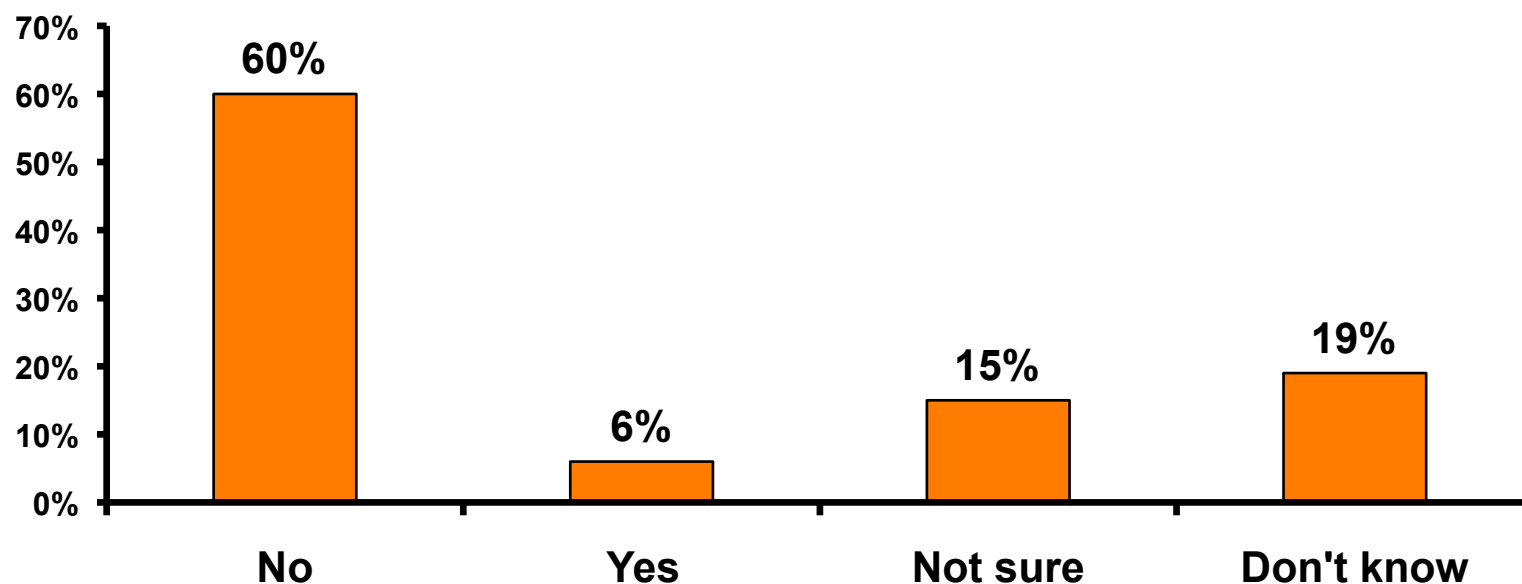
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

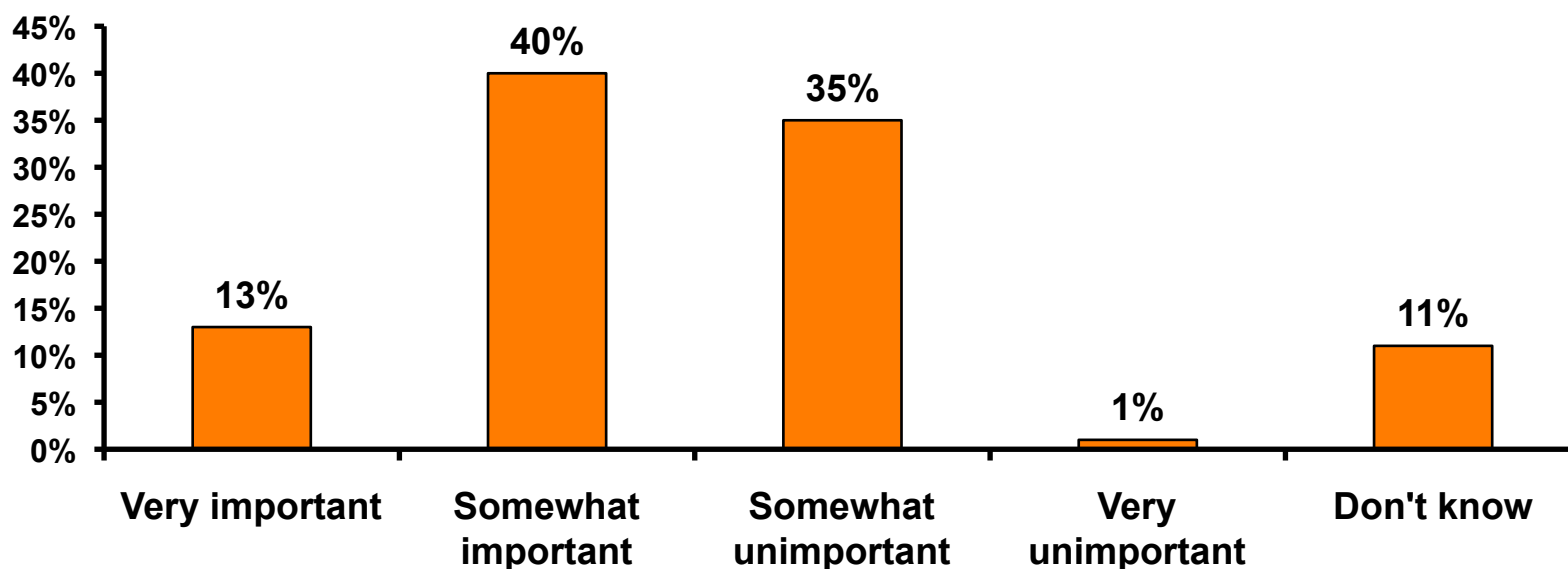
Good time to spend money on travel outside of Korea - Overall



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

		AGE					PERSONAL INCOME				
		<20	20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No	50%	58%	60%	68%	30%	65%	59%	53%	68%	57%
	Yes	50%	7%	6%	4%		17%	5%	7%	3%	14%
	Not sure		16%	13%	20%	30%	9%	15%	21%	9%	21%
	Do not know		20%	21%	8%	40%	9%	21%	19%	20%	7%
Total	Count	2	102	188	50	10	23	131	101	74	14

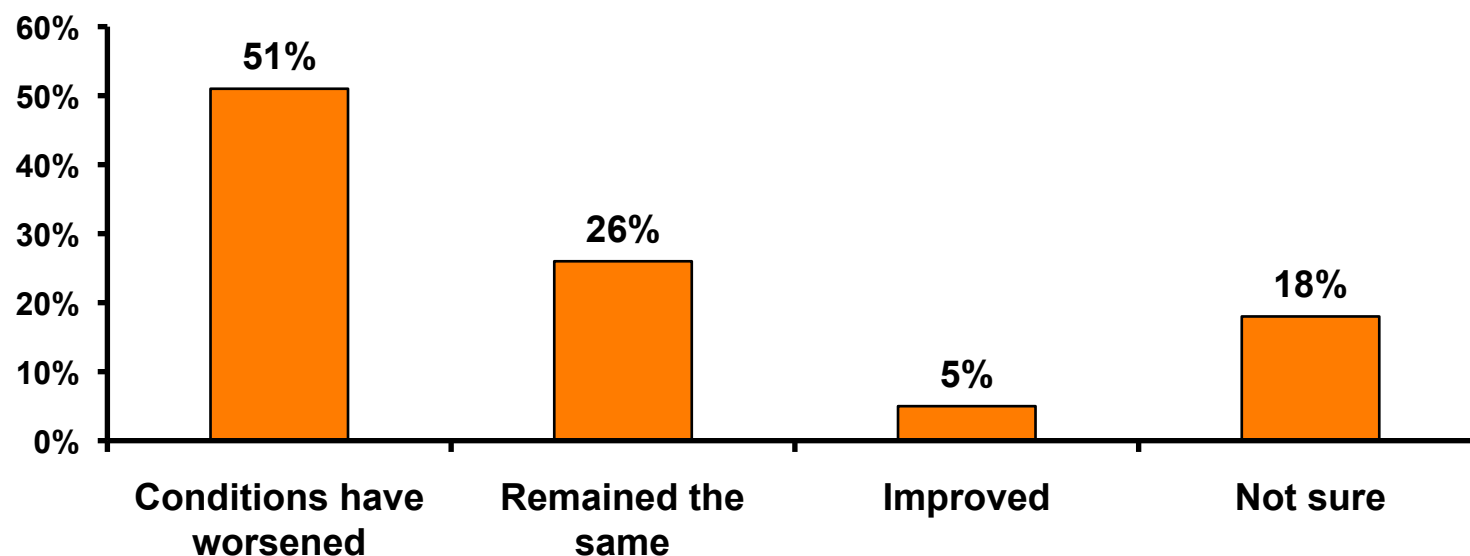
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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		2%	1%		20%	5%	1%	2%	1%	
	Somewhat unimportant	50%	35%	35%	35%	30%	27%	35%	36%	39%	7%
	Somewhat important		37%	42%	47%	20%	41%	38%	40%	47%	29%
	Very important	50%	15%	12%	10%	10%	18%	12%	10%	8%	50%
	Don't know		12%	11%	8%	20%	9%	14%	11%	4%	14%
Total	Count	2	101	187	49	10	22	131	99	74	14

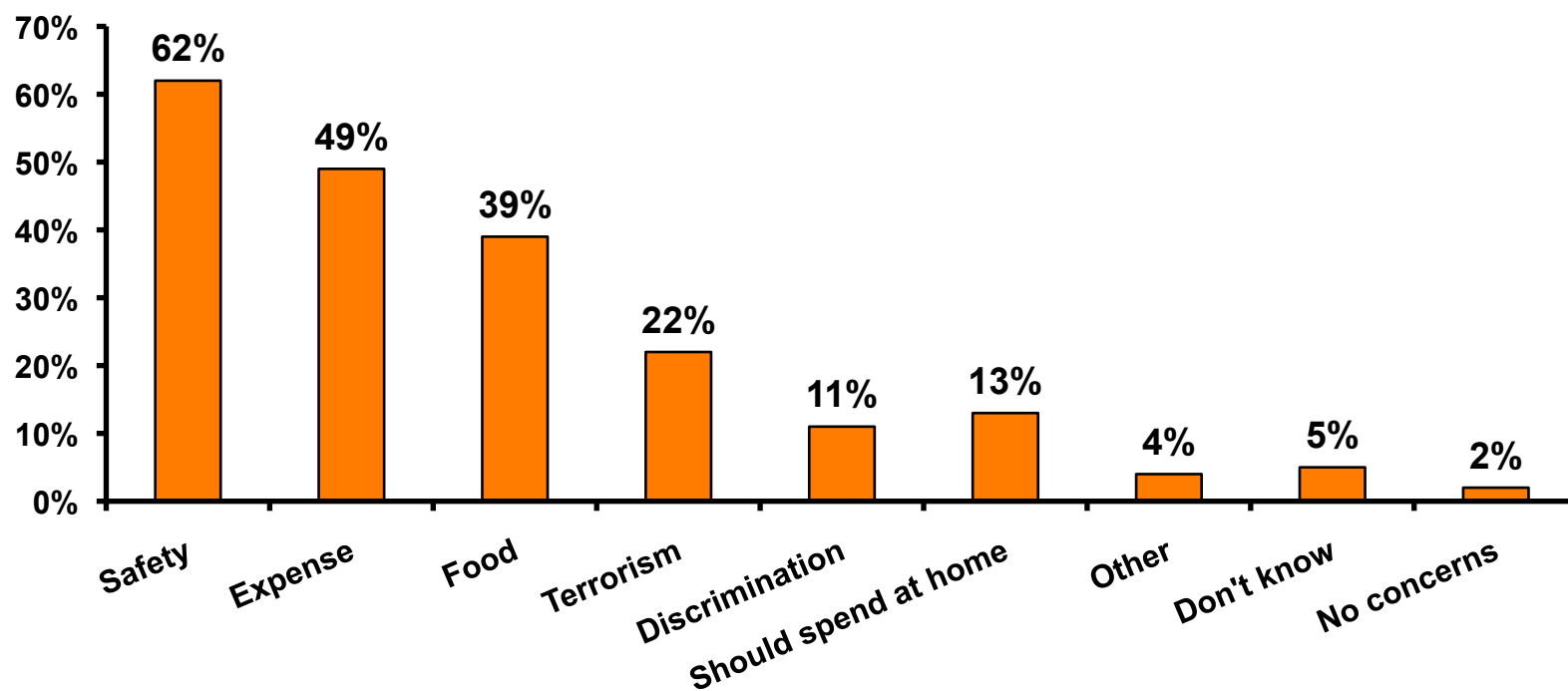
Rating Korean Economy Compared to 12 months ago



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	50%	57%	49%	44%	80%	70%	54%	45%	49%	43%
	Conditions have remained the same	50%	24%	26%	32%	10%	9%	24%	30%	27%	36%
	Conditions have improved		7%	5%	2%			7%	5%	4%	
	Do not know		13%	20%	22%	10%	22%	15%	21%	20%	21%
Total	Count	2	102	188	50	10	23	131	101	74	14

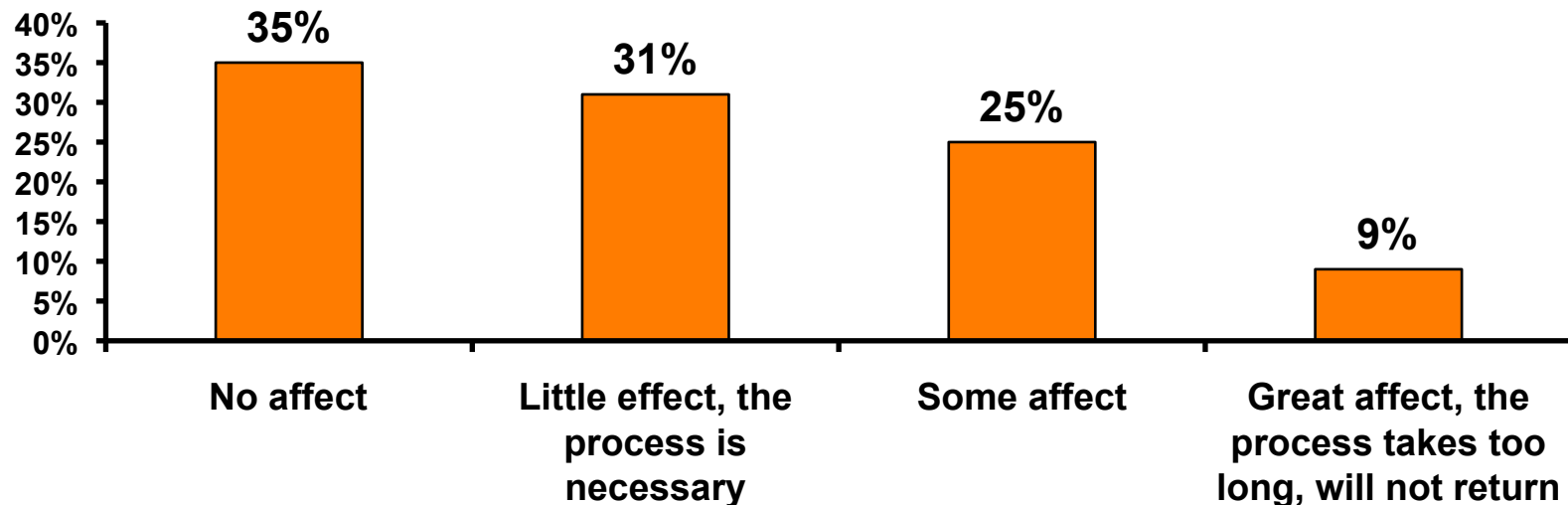
Concerns about travel outside of Korea - Overall



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%	62%	63%	67%	60%	57%	63%	61%	64%	86%
	Expense		55%	51%	47%	10%	57%	48%	50%	54%	43%
	Food		40%	39%	41%	40%	30%	34%	45%	43%	36%
	Terrorism		25%	19%	33%		13%	23%	27%	20%	1.4%
	Spending money abroad when it should be spent at home		18%	12%	6%	20%	13%	12%	13%	9%	29%
	Do not know		4%	5%	6%	10%	4%	6%	3%	4%	7%
	Other		5%	4%	2%		9%	3%	3%	4%	1.4%
	No concerns		2%	2%				3%	1%		7%
Total	Cases	1	102	185	49	10	23	129	98	74	14

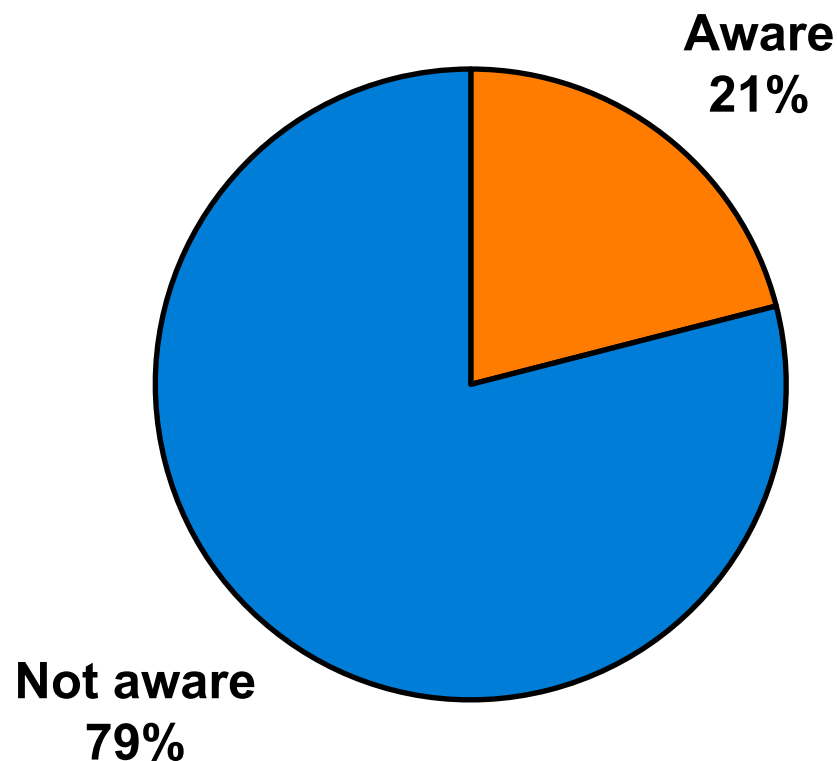
Security Screening/ Immigration Process at Guam International Airport



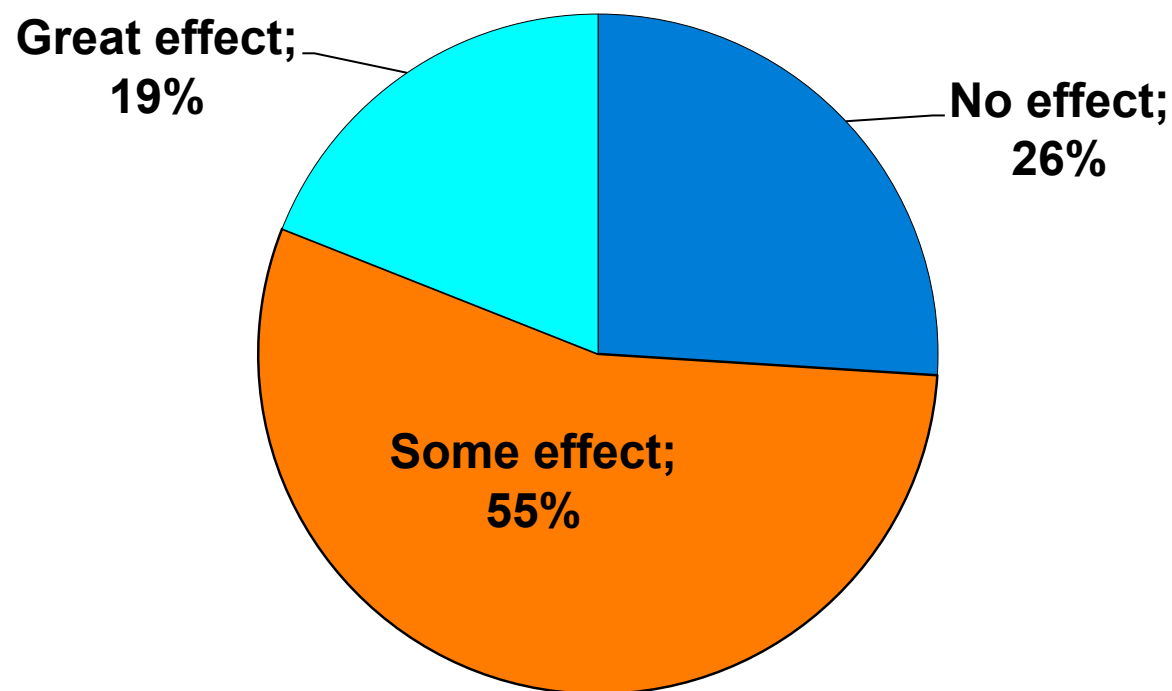
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **2.7** out of possible 7.0
- Agree (Score 6-7) – **6%**
- Neutral (Score 4-5) – **35%**
- Disagree (Score 1-3) – **60%**

Awareness of U.S. Military troops moving from Japan to Guam



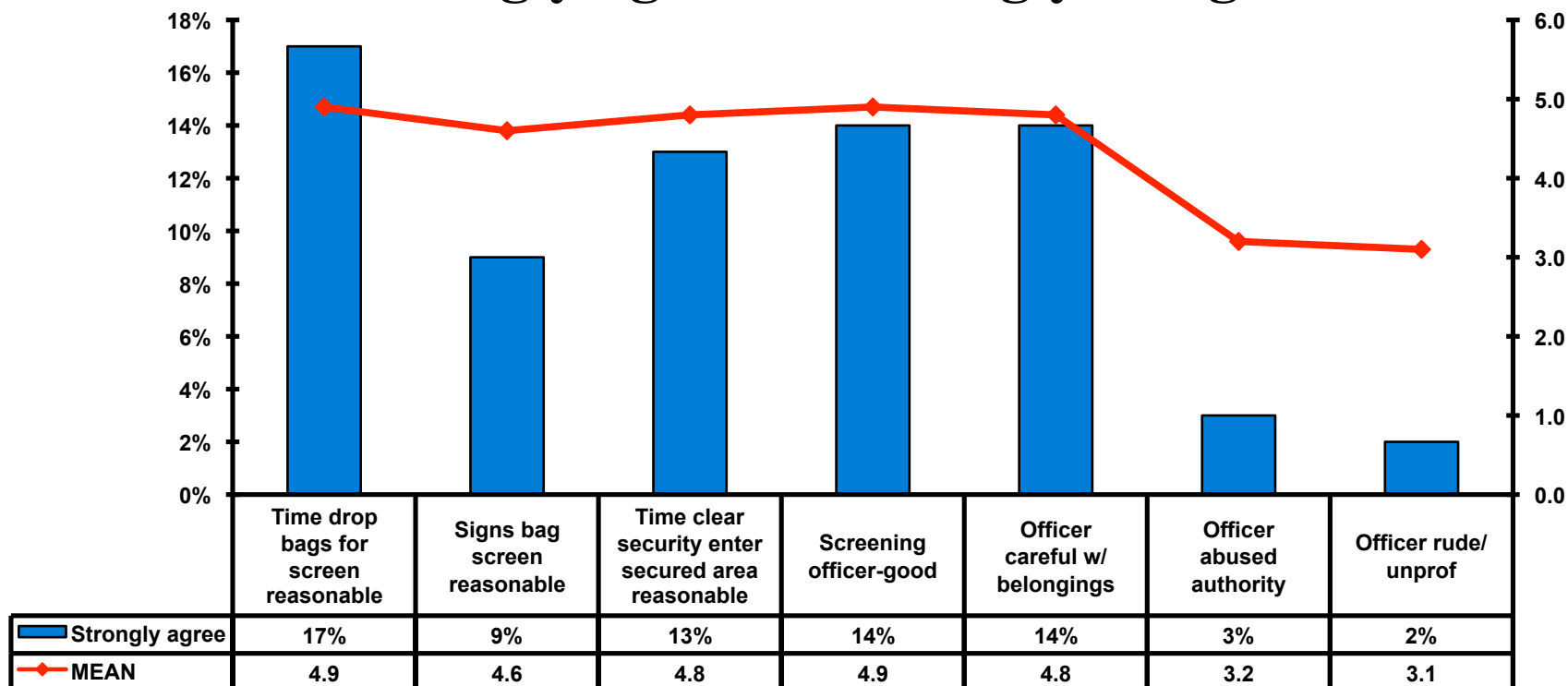
Effects of US military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

