



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

SEPTEMBER 2010



Prepared by: QMark Research

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Background & Methodology

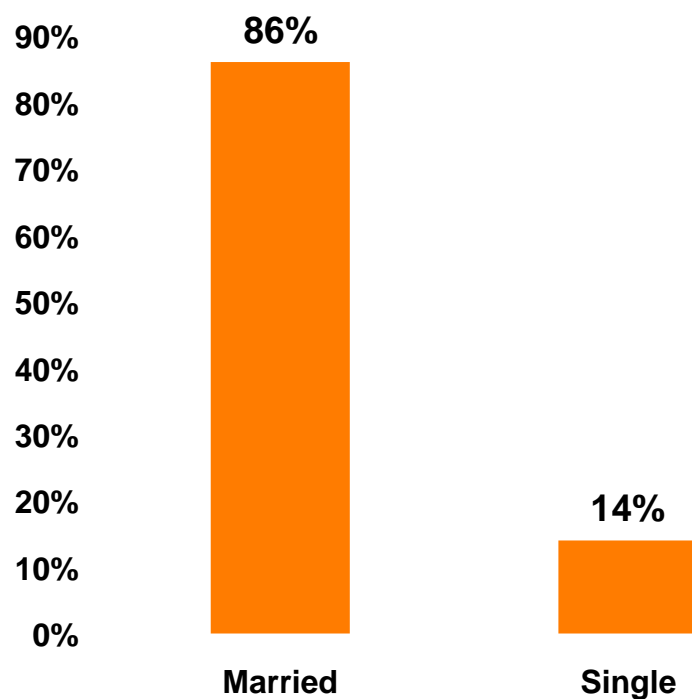
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

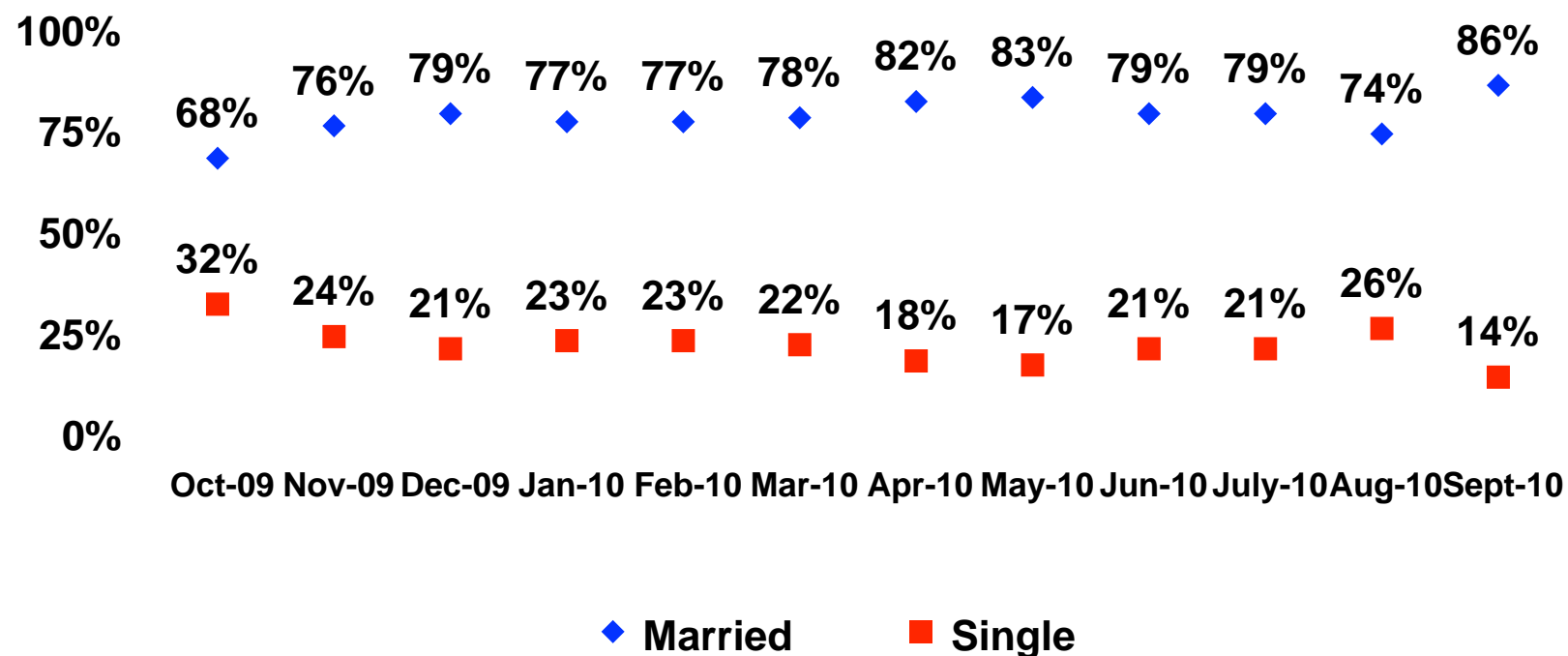
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

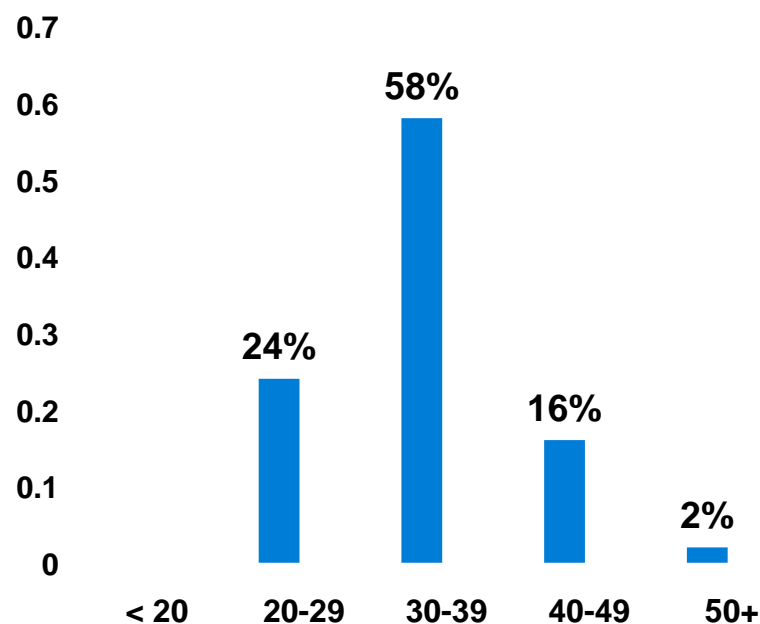


- A majority of visitors are married.

Marital Status

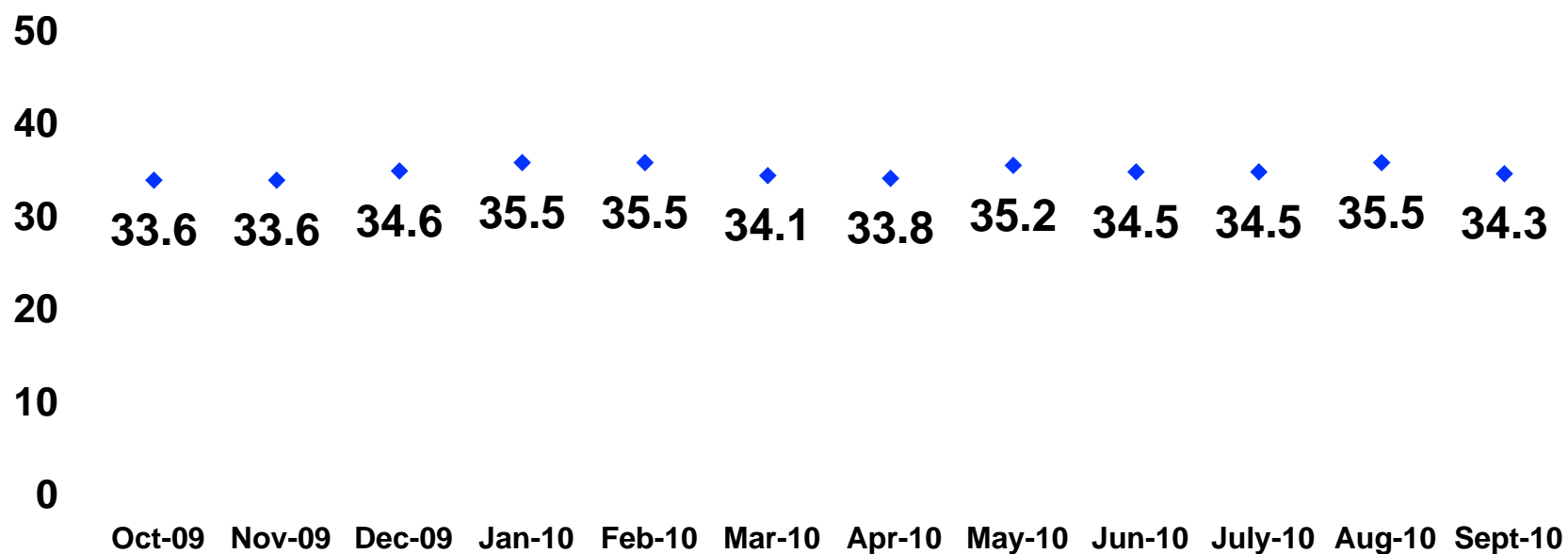


Age - Overall

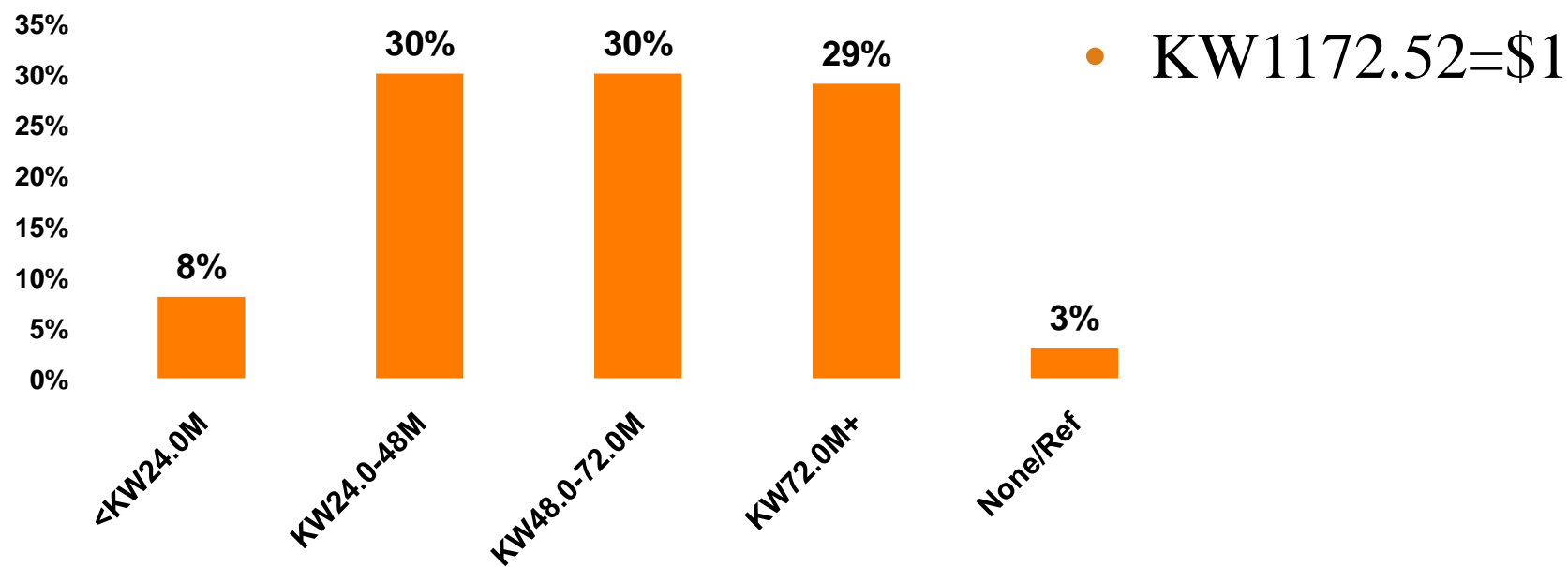


- The average age of the respondents is 34.3 years of age.

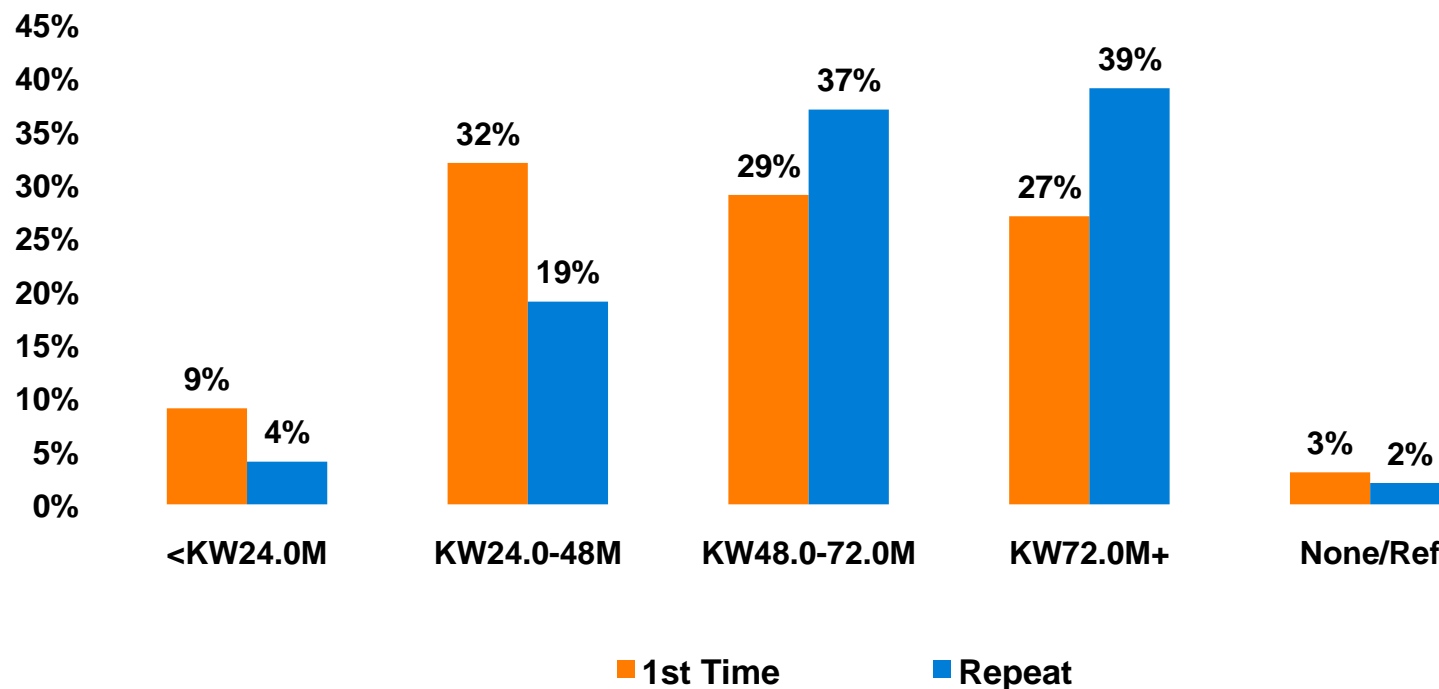
Average Age



Personal Income



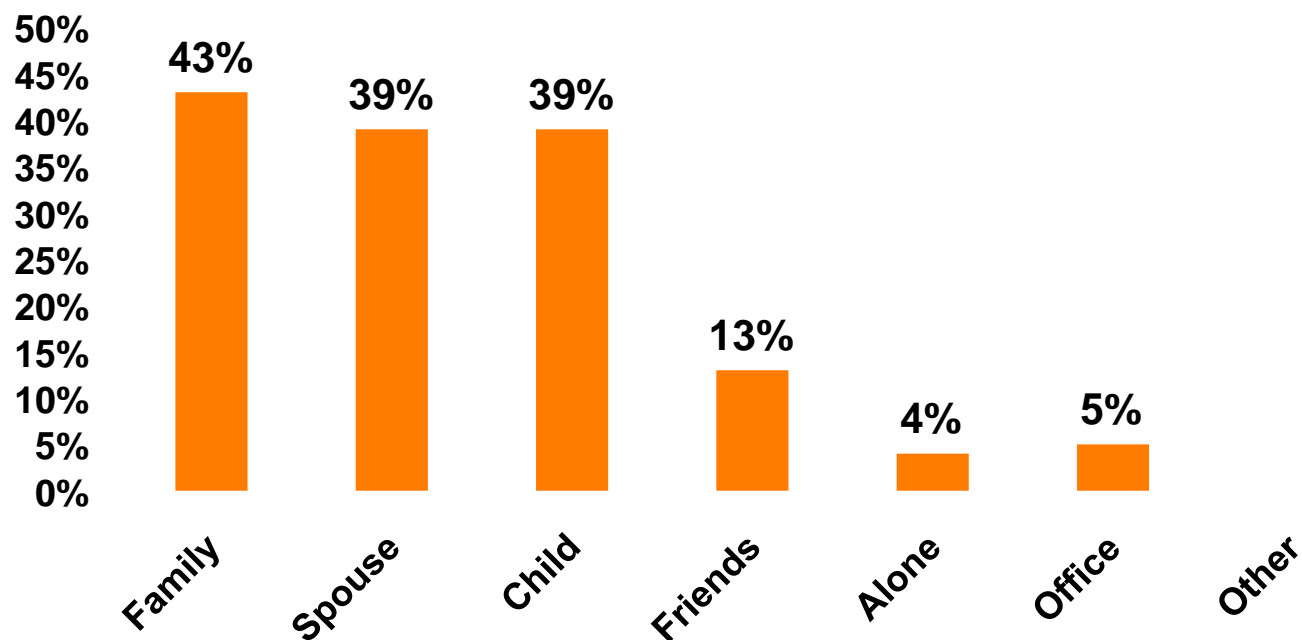
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	28	8	20	14	11	3	
			8%	5%	12%	17%	6%	5%	
	KW24.0M-KW48.0M	Count	103	54	49	38	55	8	2
			30%	31%	28%	45%	28%	15%	29%
	KW48.0M-KW72.0M	Count	105	50	55	18	72	14	1
			30%	29%	32%	21%	36%	25%	14%
	KW72.0M+	Count	101	55	46	9	59	29	4
			29%	32%	27%	11%	30%	53%	57%
	Refused	Count	9	6	3	5	3	1	
			3%	3%	2%	6%	2%	2%	
Total	Count	346	173	173	84	200	55	7	

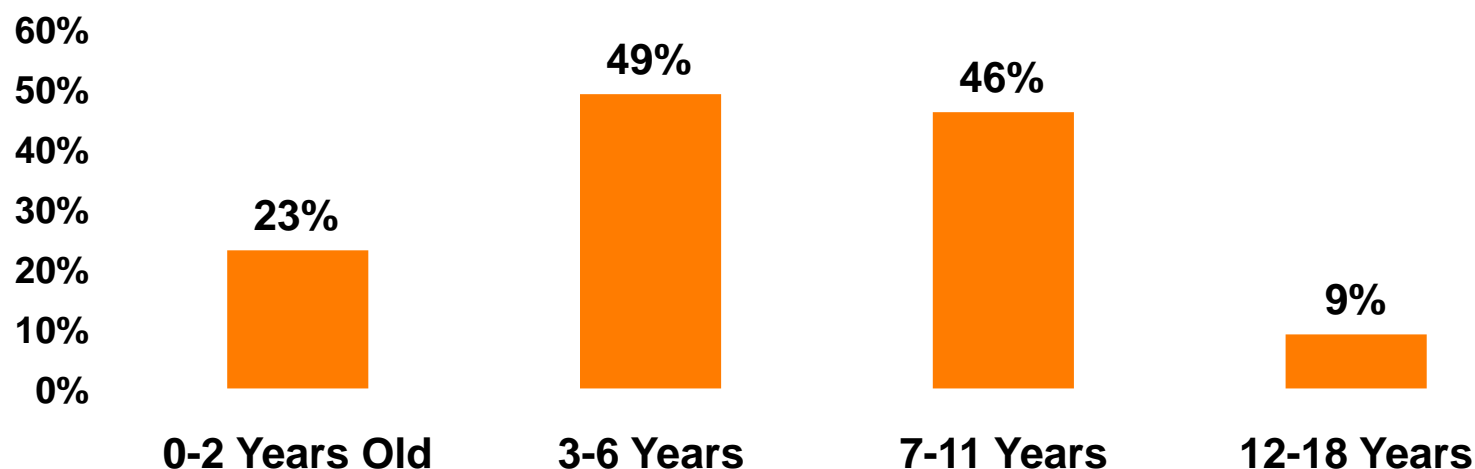
Travel Companions



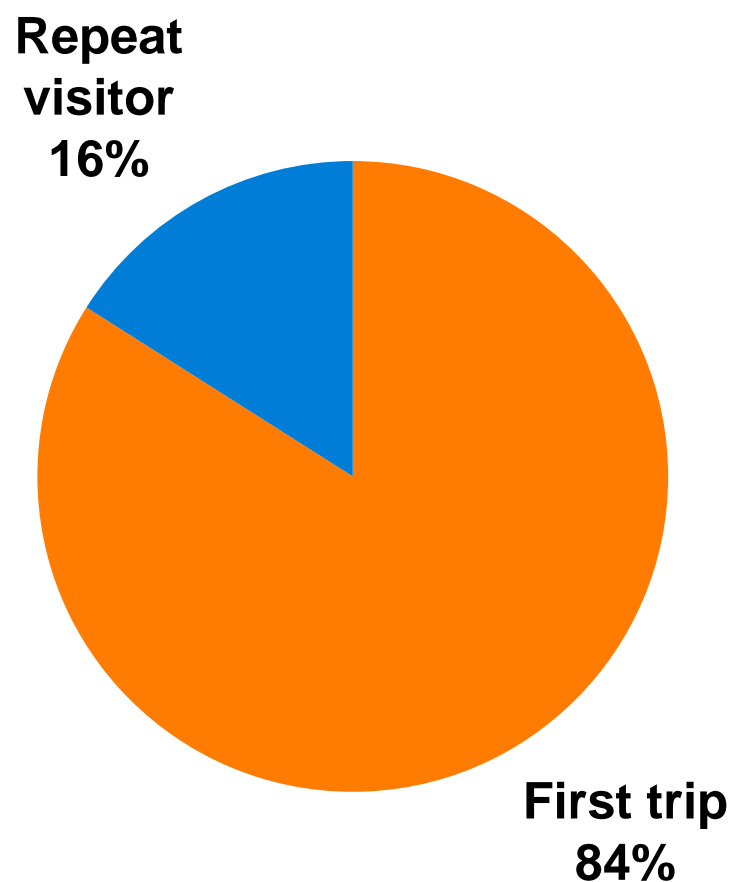
Number of Children Travel Party

N=136 total respondents traveling with children.

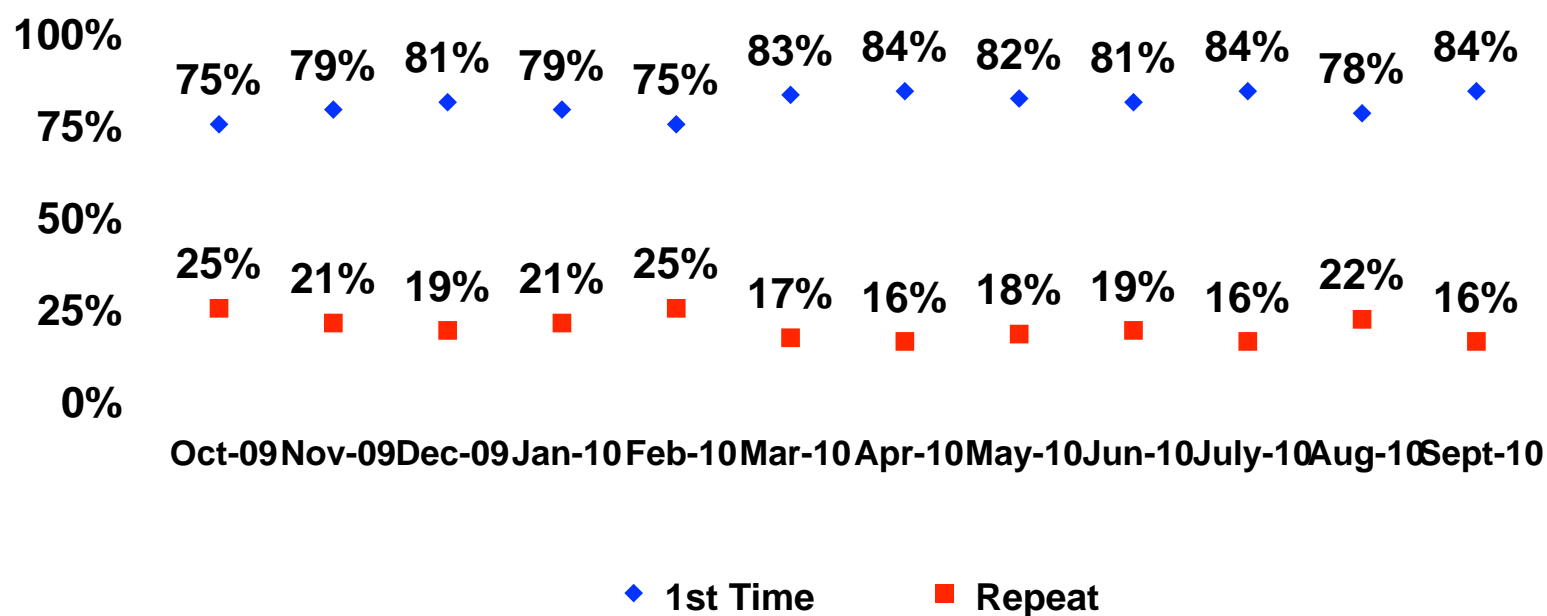
(Of those N=136 respondents, there is a total of 206 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



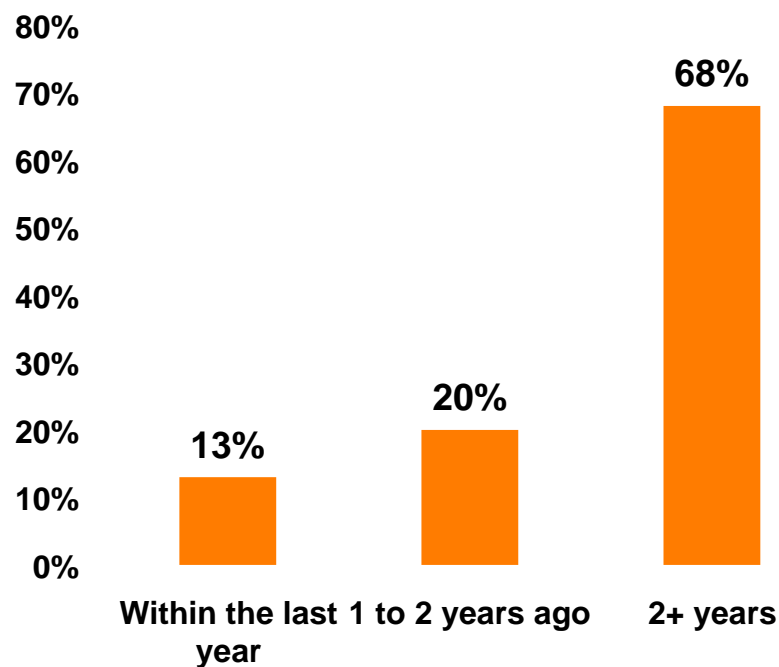
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	176	151	25
			50%	51%	44%
	Female	Count	176	143	32
			50%	49%	56%
Total		Count	352	294	57
AGE	20-29	Count	86	81	4
			24%	28%	7%
	30-39	Count	204	172	32
			58%	59%	56%
	40-49	Count	55	39	16
			16%	13%	28%
	50+	Count	7	2	5
			2%	1%	9%
Total		Count	352	294	57

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

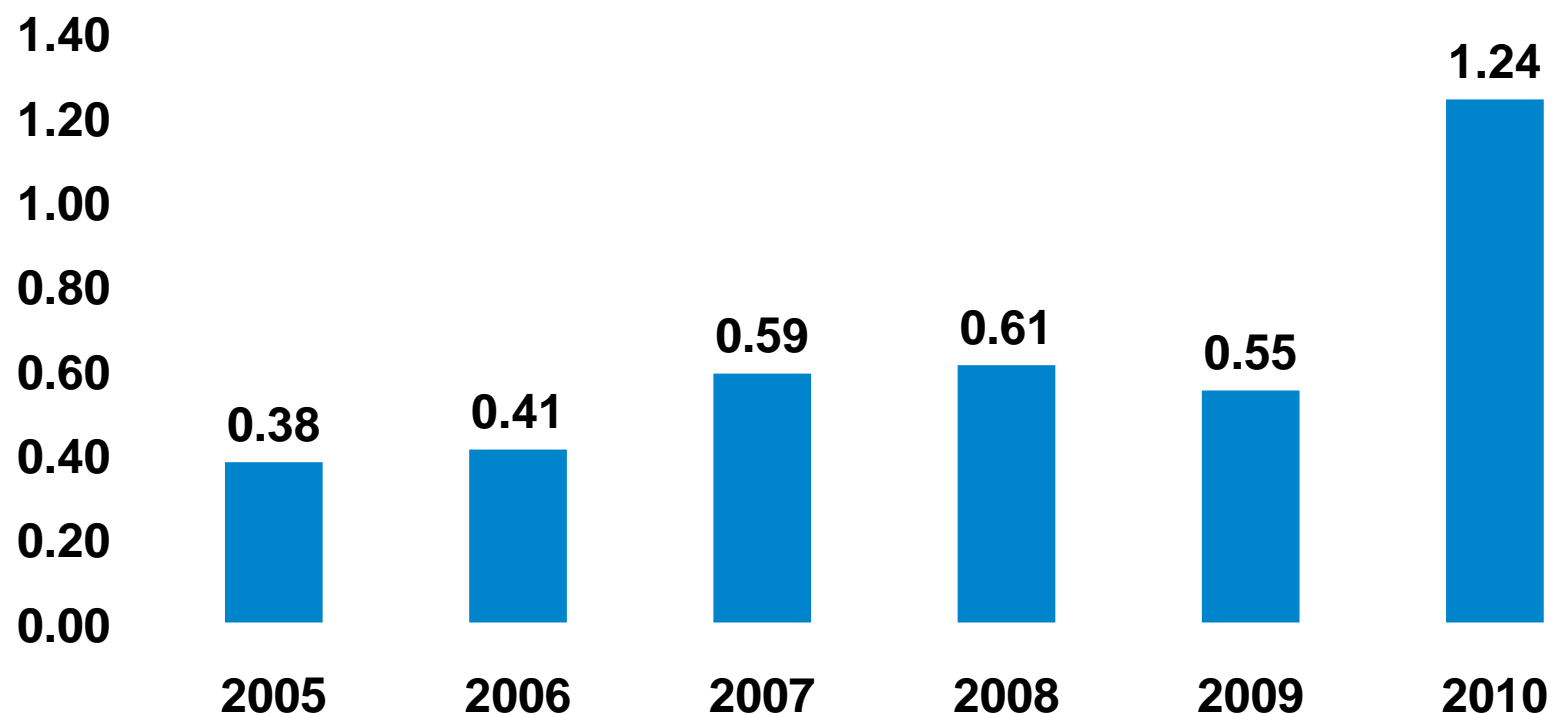
Repeat Visitors Last Trip

n = 56

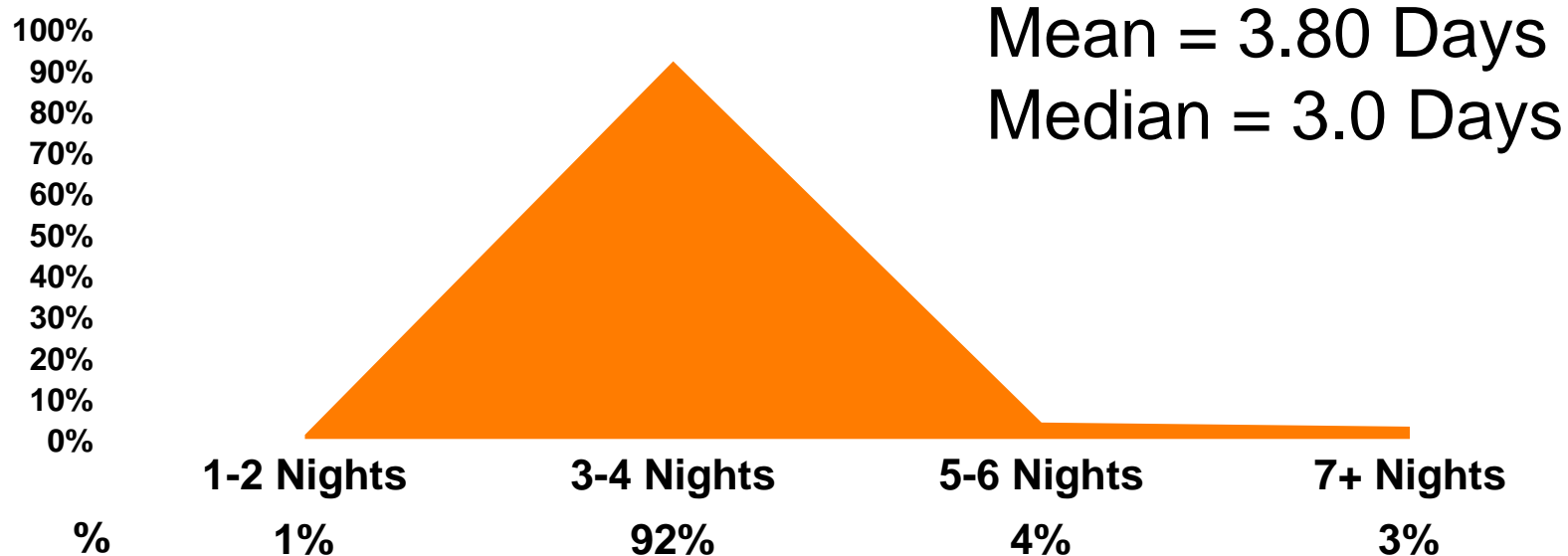


- The average repeat visitor has been to Guam 2.8 times.
- A little less than a third of the repeat visitors have been to Guam within the last 2 years.

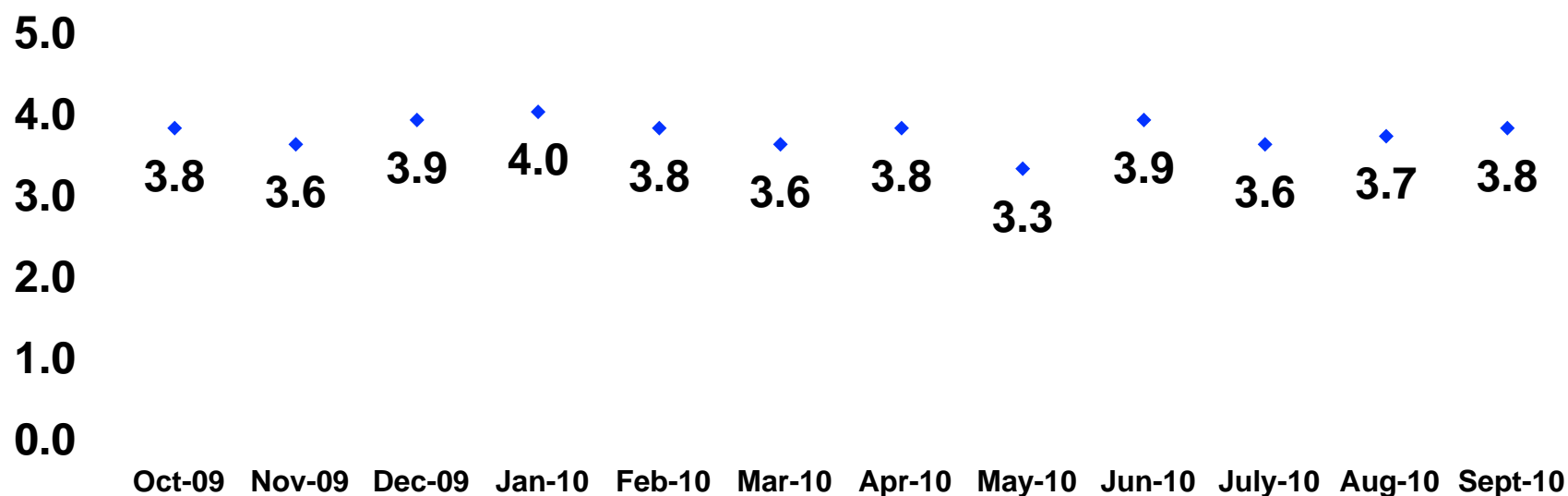
Average Number Overnight Trips (2004-2010) (2 nights or more)



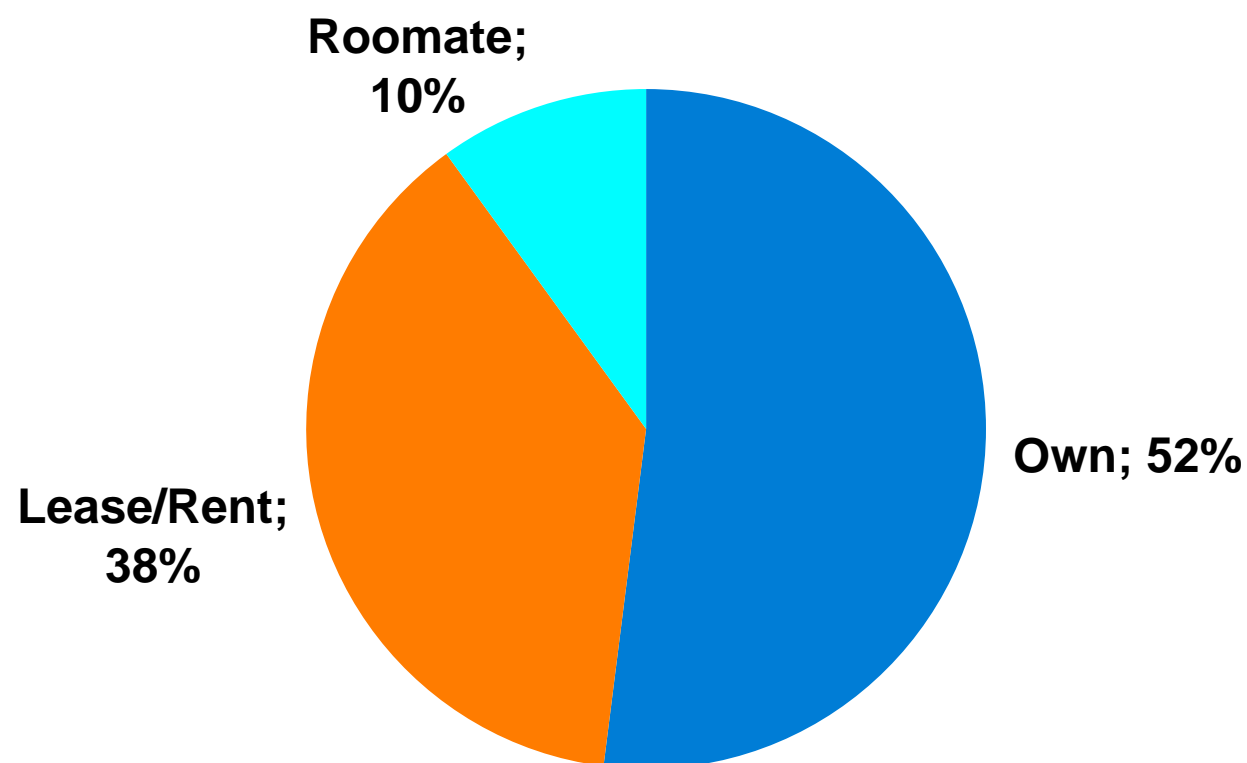
Length of Stay



Average Length of Stay



Living Accommodations

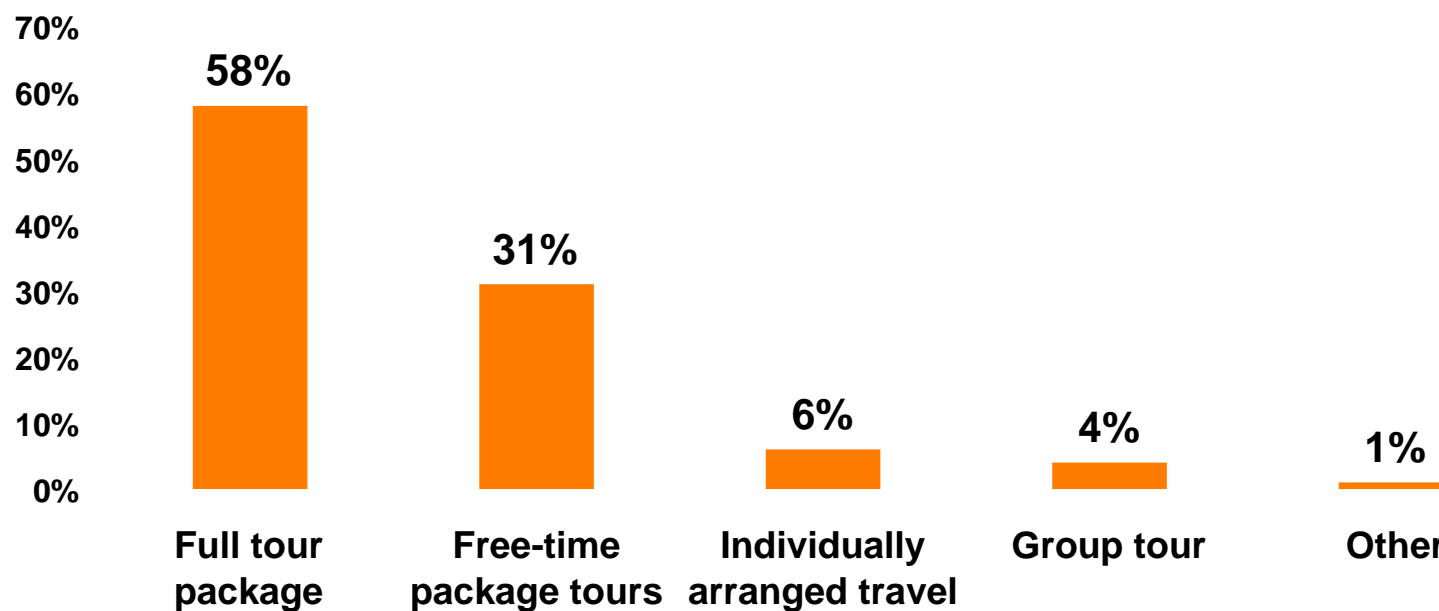


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	34%	18%	43%	39%	29%	11%
	Prof/Specialist/Tech	14%	4%	16%	14%	19%	
	Self-employed	14%	11%	12%	11%	20%	
	Homemaker	12%	7%	6%	12%	15%	22%
	Service worker	6%	18%	7%	9%		
	Manager	4%		5%	4%	5%	
	Professor/Teacher	2%	7%	3%	1%	2%	
	Student	2%	4%			1%	56%
	Other	2%	4%	2%	1%	3%	
	Govt - Office/non-mgr	2%	4%	2%	3%		
	Govt-Exec	2%		3%	2%	1%	
	Skilled worker	1%	7%	1%	2%		
	Govt-Mgr	1%	4%			3%	
	Free-lancer	1%	7%	1%	1%		
	Sales/Clerical	1%	4%		1%	1%	
	Judicial	1%				2%	
	Unemployed	1%	4%				11%
	Retired	0%		1%			
	Total	Count	352	28	103	105	101

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

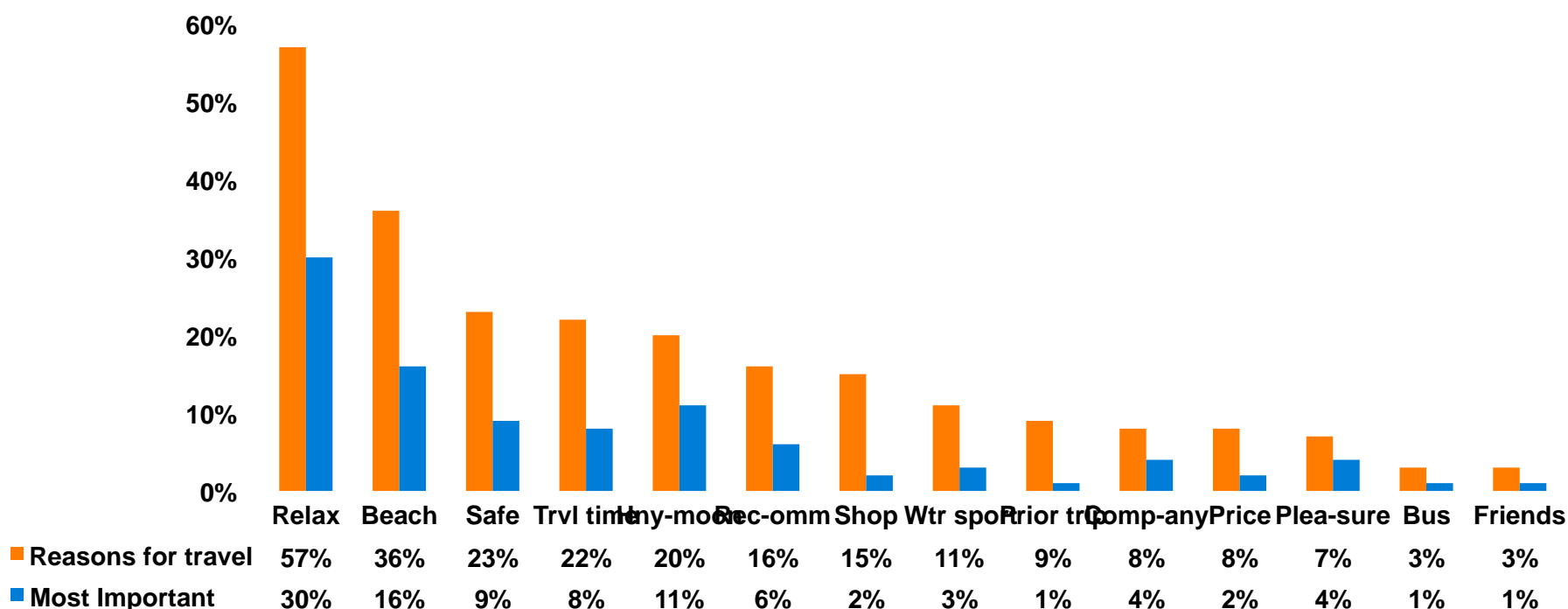


Accommodation by Income

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	57%	36%	53%	68%	59%	56%
	Hilton Guam Resort & Spa	9%	14%	7%	3%	16%	
	Hyatt Regency Guam	9%	7%	7%	11%	9%	
	Sheraton Laguna Resort	7%	14%	13%	4%	3%	11%
	The Westin Resort Guam	7%	11%	11%	3%	5%	
	Onward Beach Resort	3%	7%	4%	2%	1%	11%
	Outrigger Guam Resort	1%	4%		2%	1%	
	Holiday Resort Guam	1%		1%	1%	1%	
	Condominium	1%		1%	1%	1%	
	Relatives, Friends, Home Stay	1%		1%		2%	
	Fiesta Resort Guam	1%			3%		
	Guam Marriott Resort Hotel	1%		1%			11%
	Leo Palace Resort	1%		1%		1%	
	Guam Aurora Resort	1%	4%		1%		
	Hotel Nikko Guam	1%		1%	1%		
	Ohana Bayview Hotel	1%	4%		1%		
	Days Inn Tamuning	0%				1%	
	Hotel Sane Fe	0%					11%
Total	Count	352	28	103	105	101	9

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
- Guam's natural beauty/beaches and
- Safety

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	57%	51%	57%	61%	71%	58%	55%
	Beautiful seas, beaches, tropical climate	36%	34%	38%	33%	14%	38%	34%
	It is a safe place to spend a vacation	23%	21%	25%	19%	29%	22%	24%
	Short travel time	22%	29%	22%	13%	14%	18%	26%
	Honeymoon	20%	40%	17%	6%		23%	18%
	Recommendation of friend, relative, travel agency	16%	12%	19%	11%	29%	18%	15%
	Shopping	15%	16%	15%	9%	14%	15%	14%
	Water sports	11%	15%	8%	19%	14%	14%	9%
	A previous visit	9%	1%	9%	15%	43%	7%	10%
	Price of the tour package	8%	10%	8%	4%		11%	5%
	My company sponsored me	8%	1%	7%	20%	14%	7%	8%
	Pleasure	7%	10%	6%	7%		6%	9%
	Company or Business trip	3%	1%	2%	7%	29%	3%	3%
	To visit friends or relatives	3%	3%	1%	6%	14%	2%	3%
	SCUBA diving	2%	1%	2%	2%		3%	
	Promotional materials from GVB	2%	1%	2%			3%	1%
	To golf	1%	1%		2%	43%	2%	1%
	Organized Sporting Activity	1%		2%			3%	
	Other	1%		2%	2%		1%	2%
	To get married or Attend wedding	1%	1%	0%				1%
	Career certification or testing	0%	1%				1%	
Total	Cases	351	86	204	54	7	175	176

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	57%	36%	62%	55%	61%	44%
	Beautiful seas, beaches, tropical climate	36%	29%	29%	43%	37%	33%
	It is a safe place to spend a vacation	23%	14%	21%	29%	26%	11%
	Short travel time	22%	29%	17%	23%	27%	11%
	Honeymoon	20%	46%	35%	15%	4%	11%
	Recommendation of friend, relative, travel agency	16%	11%	19%	11%	20%	11%
	Shopping	15%	7%	18%	10%	16%	33%
	Water sports	11%	4%	13%	9%	15%	22%
	A previous visit	9%	4%	4%	10%	14%	11%
	Price of the tour package	8%	14%	9%	7%	5%	22%
	My company sponsored me	8%	7%	4%	9%	11%	
	Pleasure	7%	4%	4%	7%	10%	44%
	Company or Business trip	3%		3%	3%	5%	
	To visit friends or relatives	3%	7%	2%		5%	
	SCUBA diving	2%		3%	2%	1%	
	Promotional materials from GVB	2%		2%	1%	2%	11%
	To golf	1%		3%		2%	
	Organized Sporting Activity	1%			2%	3%	
	Other	1%			4%	1%	
		To get married or Attend wedding	1%		1%	1%	
	Career certification or testing	0%					11%
Total	Cases	351	28	102	105	101	9

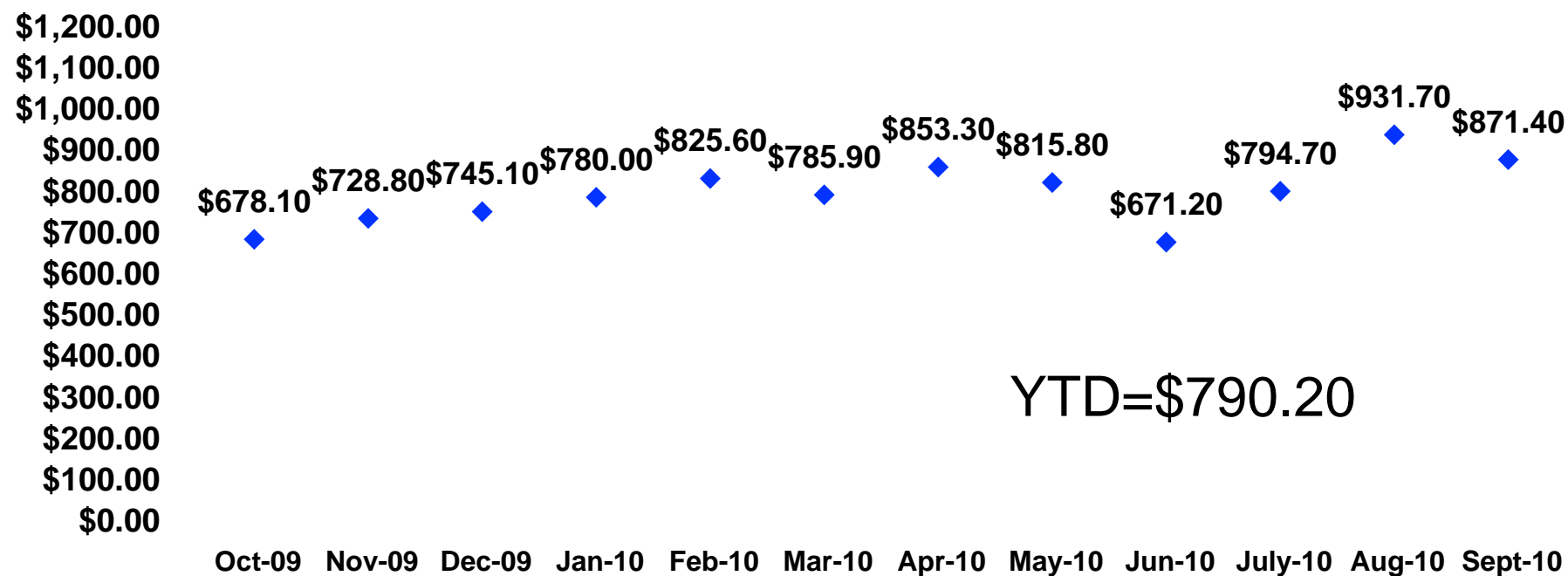
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1172.52/US\$1

- \$2,057.40 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$9,893 = maximum (highest amount recorded for the entire sample)
- \$871.40 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

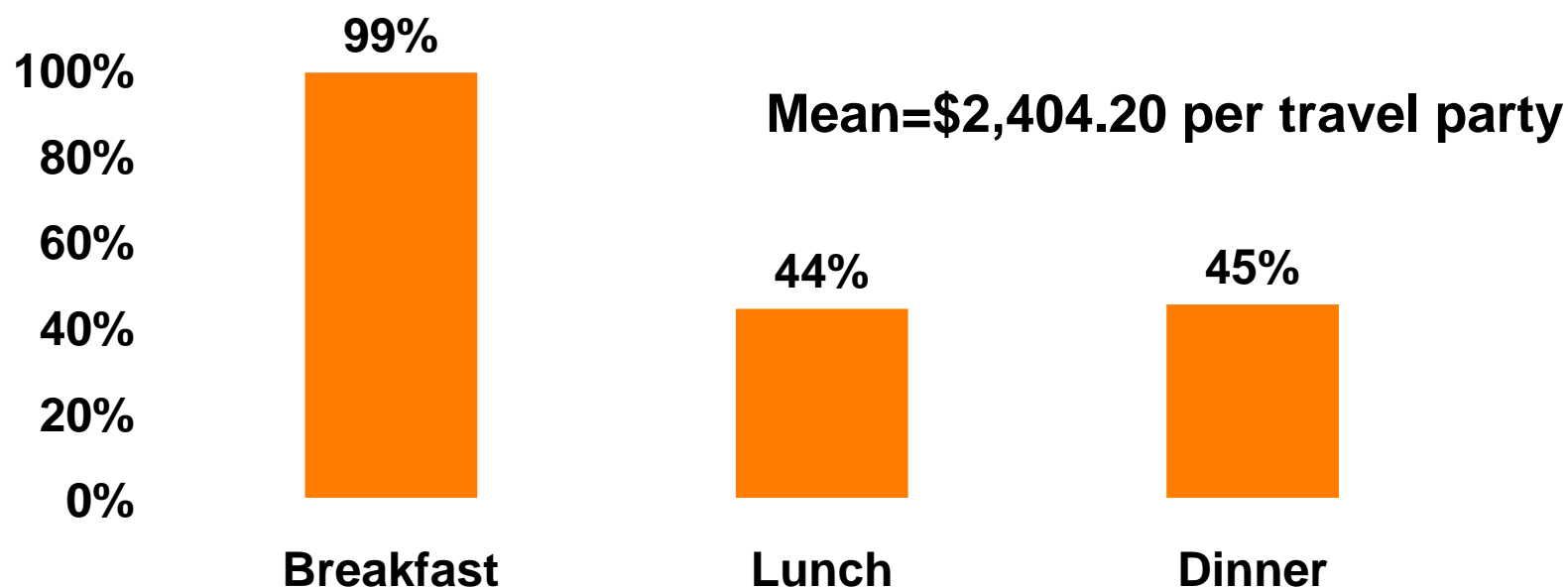
KW1172.52=\$1

(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,248.10
Air & Accommodation w/ daily meal package	\$2,404.20
Air only	\$581.40
Accommodation only	\$978.00
Accommodation w/ daily meal only	\$1,705.70
Food & Beverages in Hotel	\$96.70
Ground transportation- Korea	\$68.20
Ground transportation- Guam	\$130.20
Optional tours/ activities	\$273.40
Other expenses	\$436.50
Total Prepaid	\$2,057.40

Prepaid Meal Breakdown

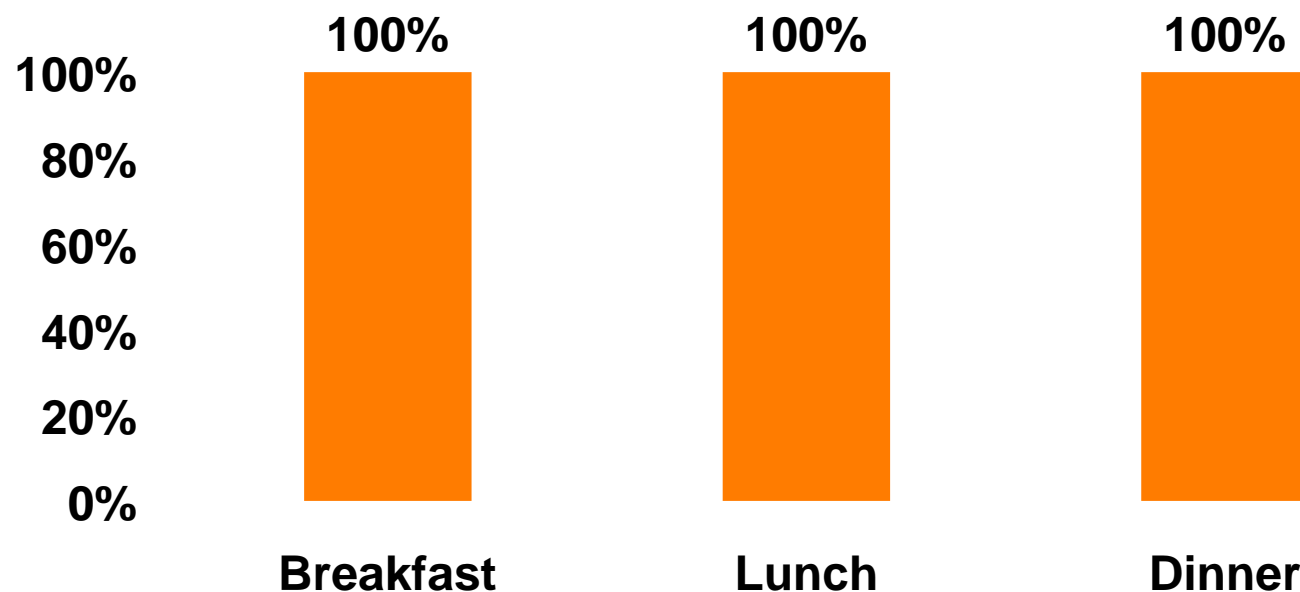
Air/ Accommodations with Daily Meal Package
n=164



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

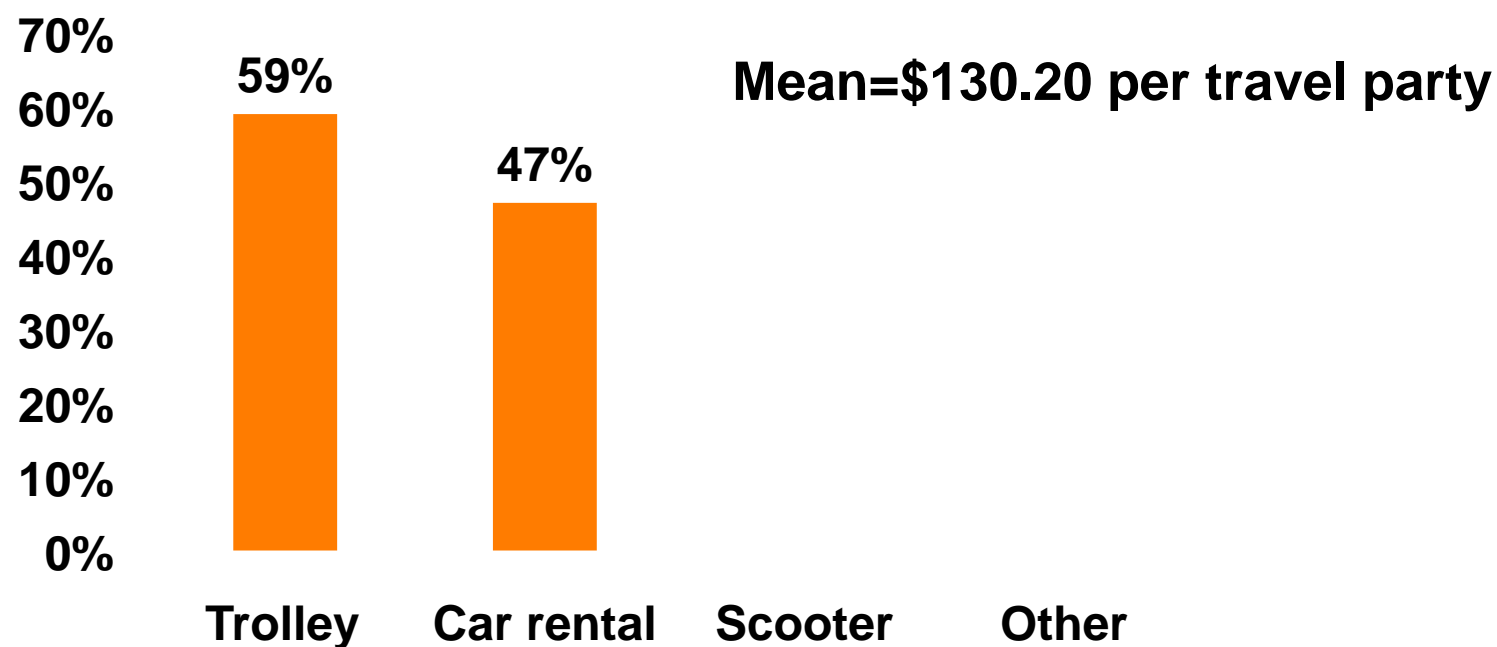
n=1



Mean=\$1,705.70 per travel party

Prepaid Ground Transportation

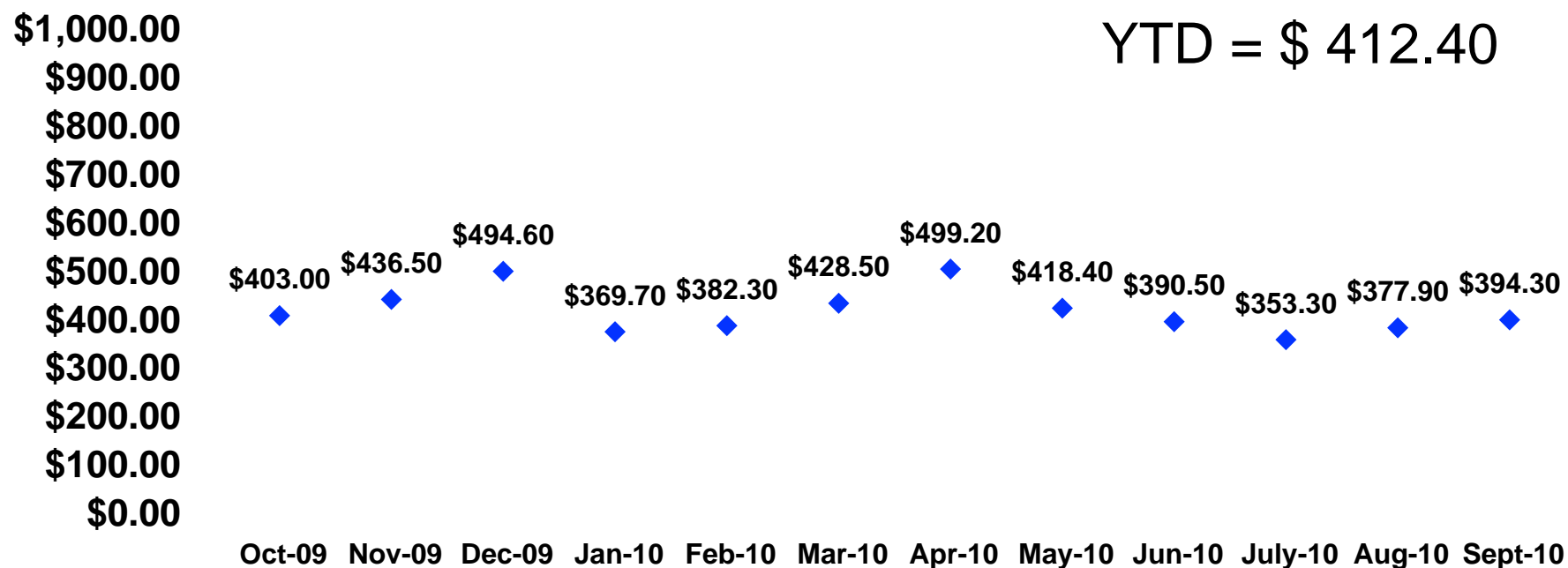
n=17



On-Island Expenditures

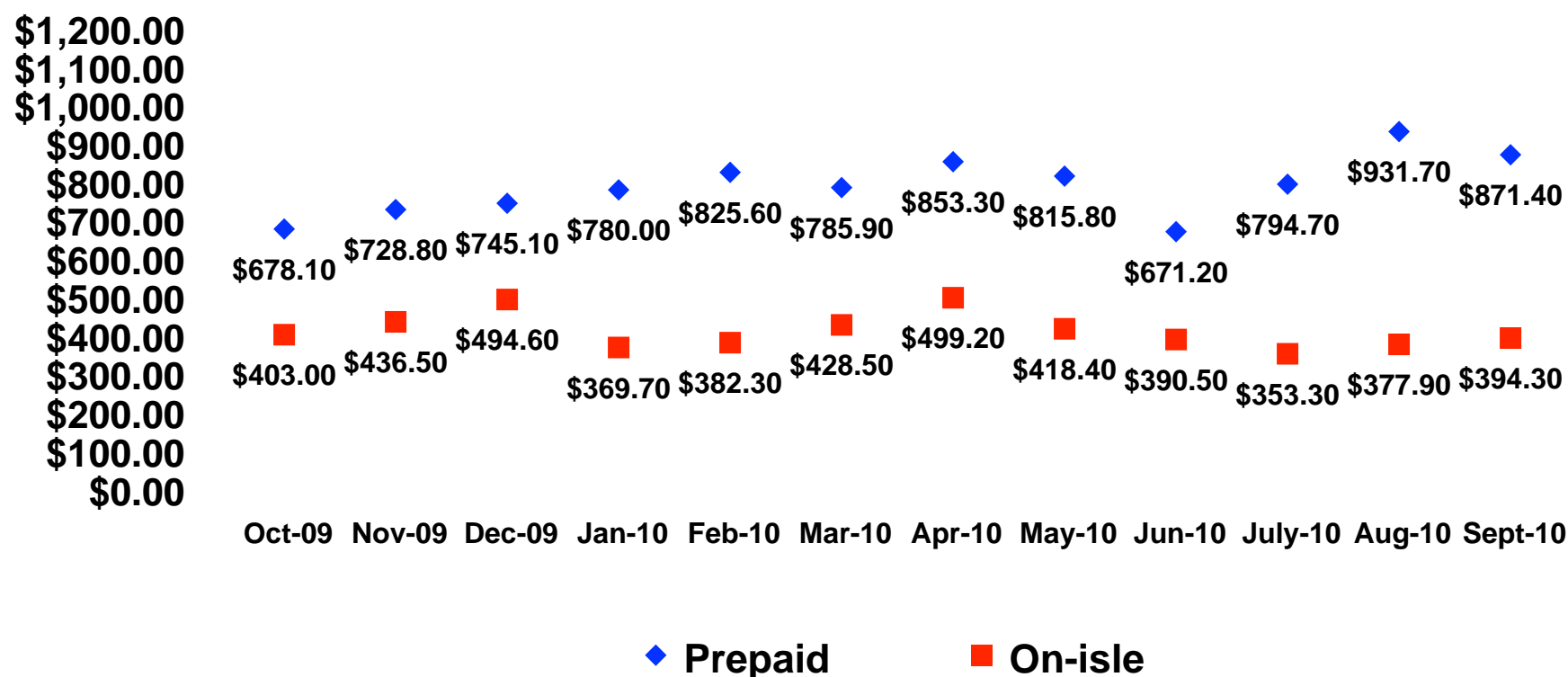
- \$862.70 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,000 = Maximum (highest amount recorded for the entire sample)
- \$394.30 = overall mean average per person on-island expenditure

On-Island Expenditures



Prepaid/On-Island Expenditures

On-Island YTD = \$412.40
Prepaid YTD=\$790.20



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	\$862.69	\$916.21	\$809.18	\$1,384.60	\$671.83	\$1,227.42	\$1,710.00	\$1,016.99	\$617.16	\$1,150.84	\$250.00
	Median	\$511	\$500	\$600	\$830	\$420	\$500	\$1,000	\$800	\$502	\$836	\$250

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$36.25	\$42.96	\$29.54	\$53.40	\$33.21	\$25.33	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$16.21	\$14.89	\$17.53	\$16.19	\$17.37	\$13.64	\$2.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$35.10	\$41.52	\$28.68	\$35.21	\$34.10	\$24.91	\$142.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$108.63	\$107.71	\$109.55	\$121.78	\$90.26	\$166.36	\$28.57
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$164.92	\$153.93	\$175.91	\$202.27	\$142.66	\$173.16	\$290.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$95.16	\$65.94	\$124.38	\$120.35	\$86.56	\$94.33	\$42.86
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$20.32	\$23.02	\$17.63	\$25.74	\$20.16	\$15.05	\$0.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER EXP	Mean	\$385.71	\$465.54	\$306.34	\$549.34	\$220.65	\$688.18	\$785.71
	Median	\$24	\$10	\$30	\$70	\$2	\$50	\$200
TOTAL ON ISLAND	Mean	\$862.69	\$916.21	\$809.18	\$1,123.85	\$646.64	\$1,200.96	\$1,292.86
	Median	\$511	\$500	\$600	\$800	\$500	\$580	\$500

On-Island Expenditures

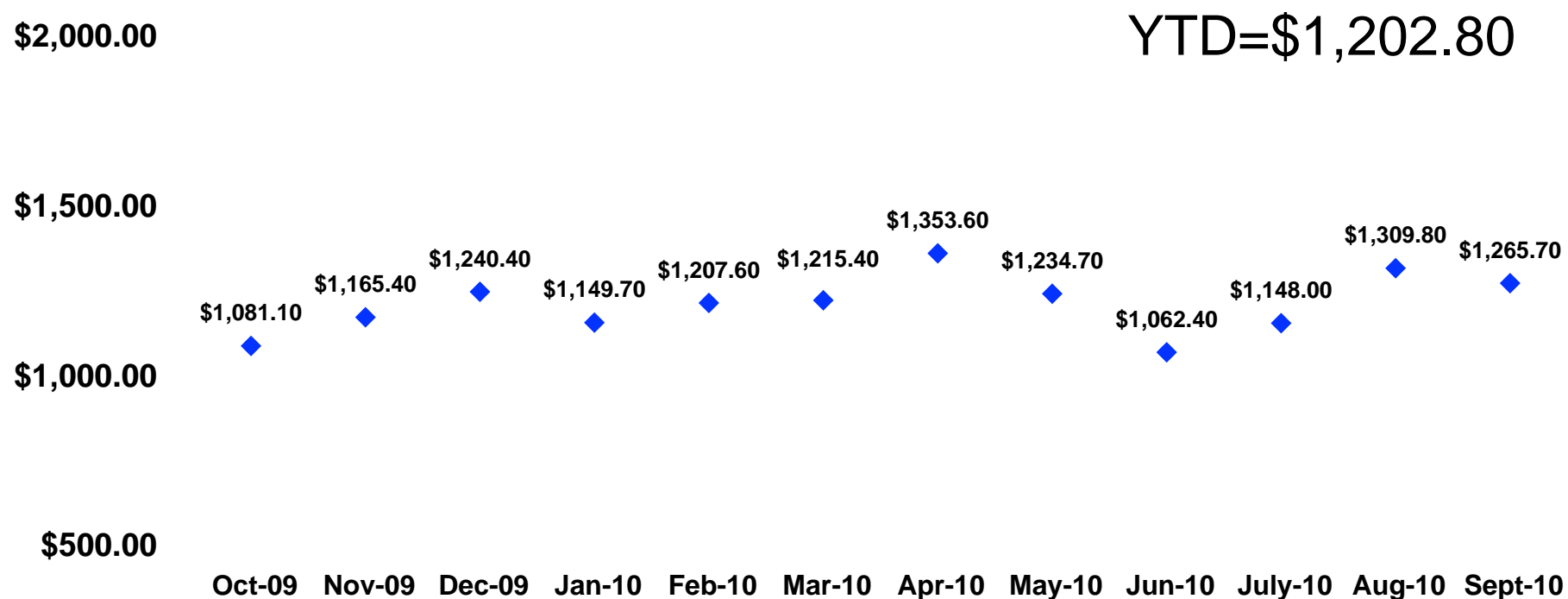
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$33.73	\$49.88
	Median	\$0	\$0
F&B-FF	Mean	\$16.04	\$17.37
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$26.96	\$74.65
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$121.05	\$45.05
TOUR	Median	\$0	\$0
GIFT/	Mean	\$151.41	\$237.47
SOUV-SELF	Median	\$0	\$0
GIFT/ SOUV-	Mean	\$96.49	\$89.98
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$18.14	\$31.26
	Median	\$0	\$0
OTHER EXP	Mean	\$410.43	\$256.56
	Median	\$15	\$60
TOTAL ON	Mean	\$872.18	\$814.87
ISLAND	Median	\$538	\$500

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,265.70 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,972 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

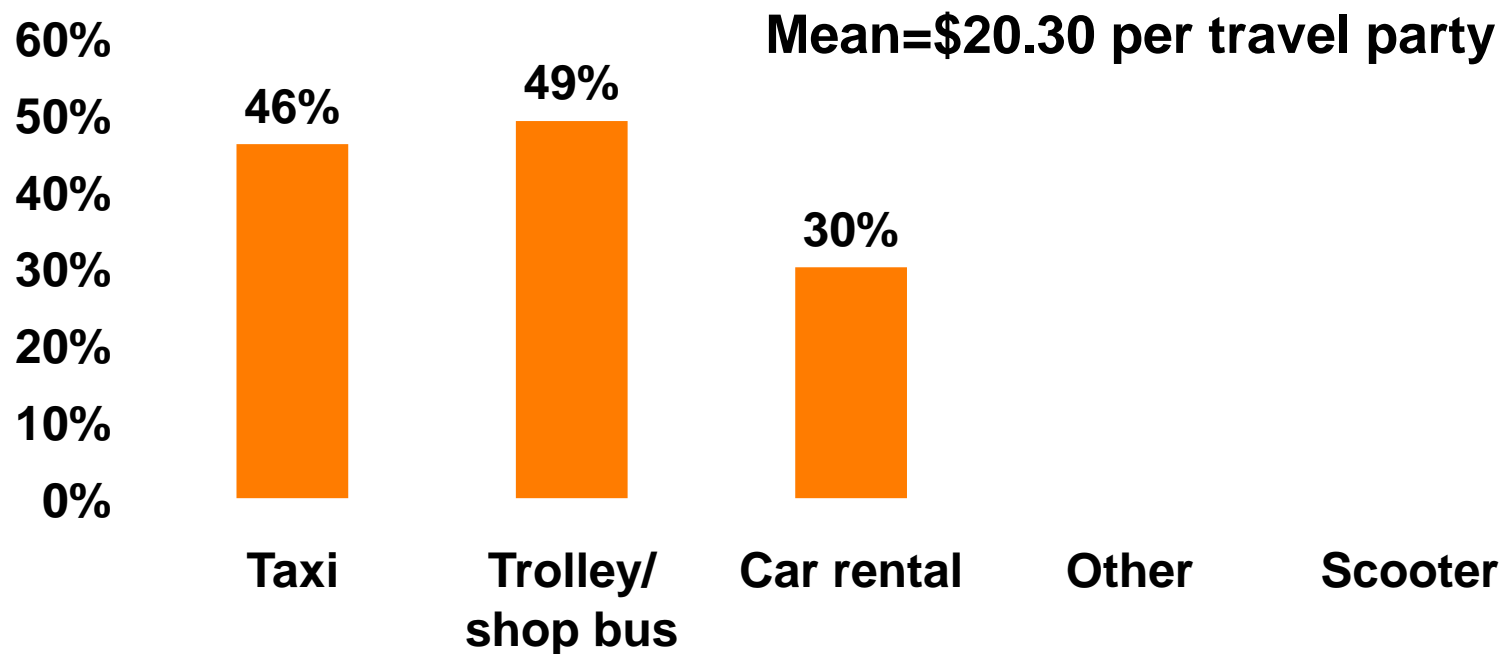


Breakdown of On-Island Expenditures

⋮	MEAN \$
Food & beverage in a hotel	\$36.30
Food & beverage in fast food restaurant/ convenience store	\$16.20
Food & beverage at restaurants or drinking establishments outside a hotel	\$35.10
Optional tours and activities	\$108.60
Gifts/ souvenirs for yourself/companions	\$164.90
Gifts/ souvenirs for friends/family at home	\$95.20
Local transportation	\$20.30
Other expenses not covered	\$385.70
Average Total	\$862.70

Local Transportation

n=92



Guam Airport Expenditures

- \$58.20 = 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

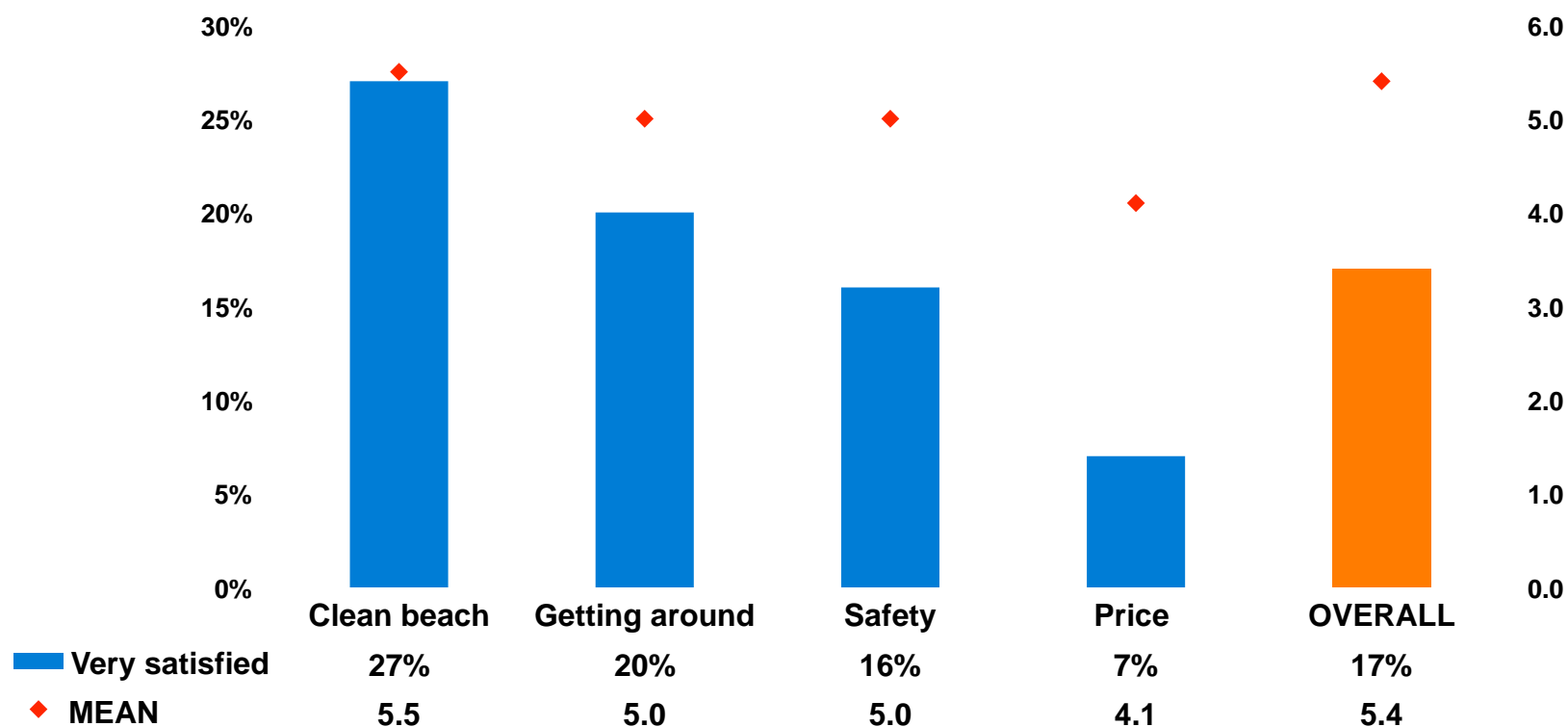
::	MEAN \$
Food & Beverages	\$4.50
Gifts/Souvenirs Self	\$29.30
Gifts/Souvenirs Others	\$24.40
Total	\$58.20

SECTION 4 **VISITOR SATISFACTION**

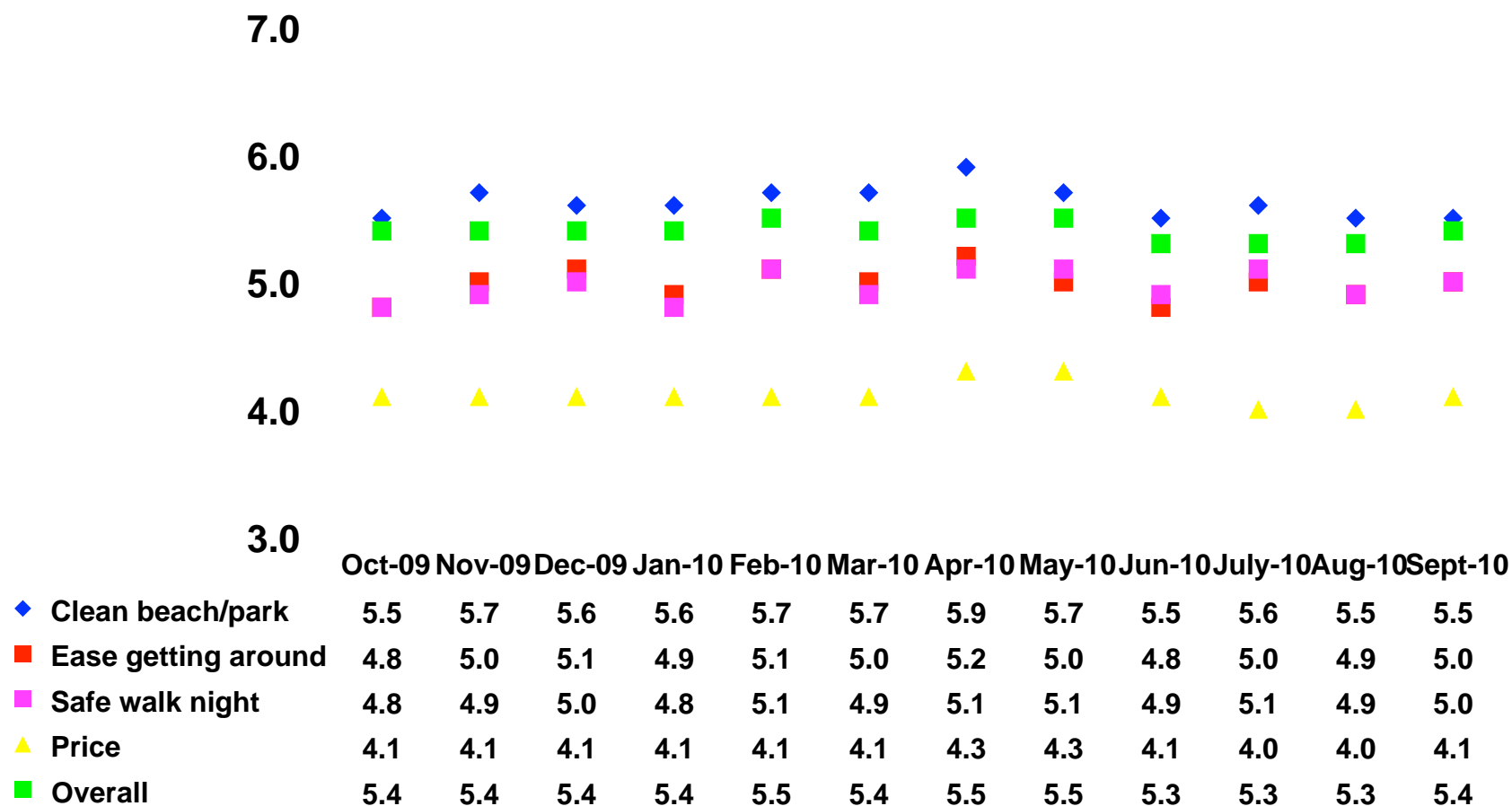
Satisfaction Scores Overall

7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



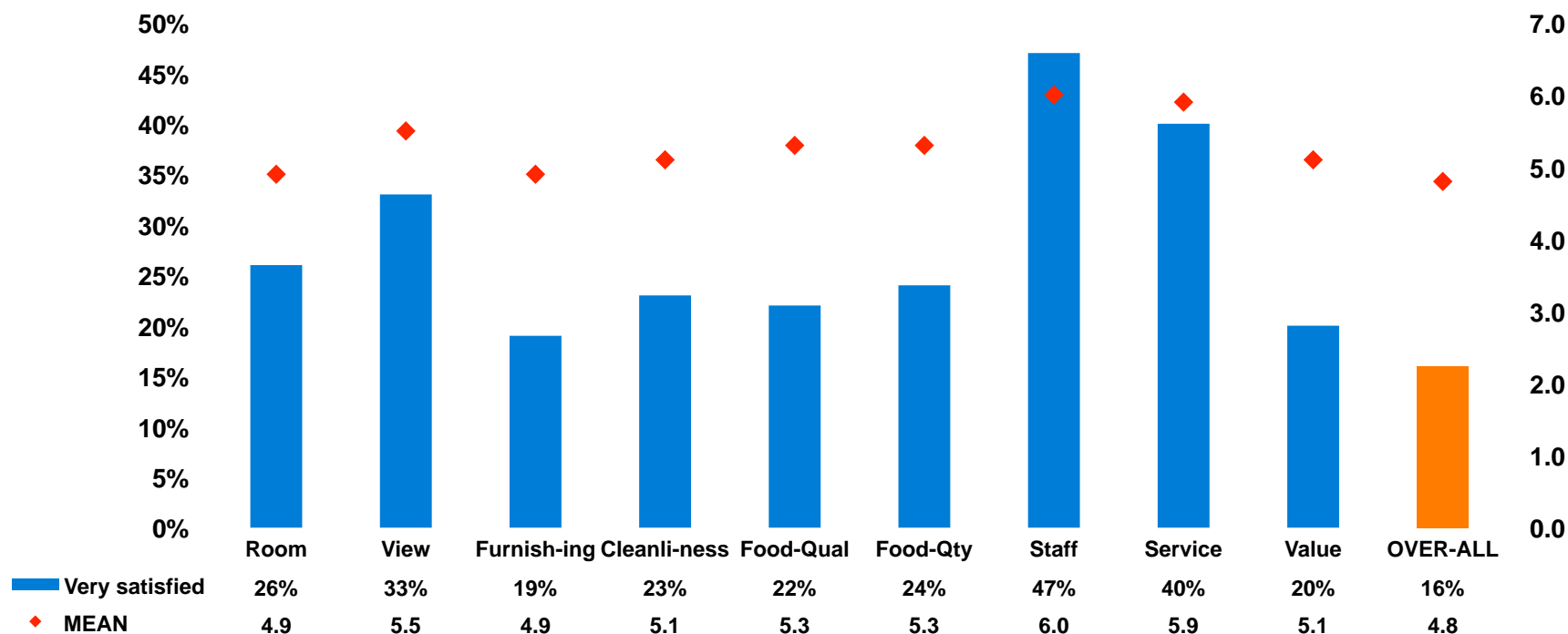
Guam Perceptions



Quality of Accommodations

7pt Rating Scale

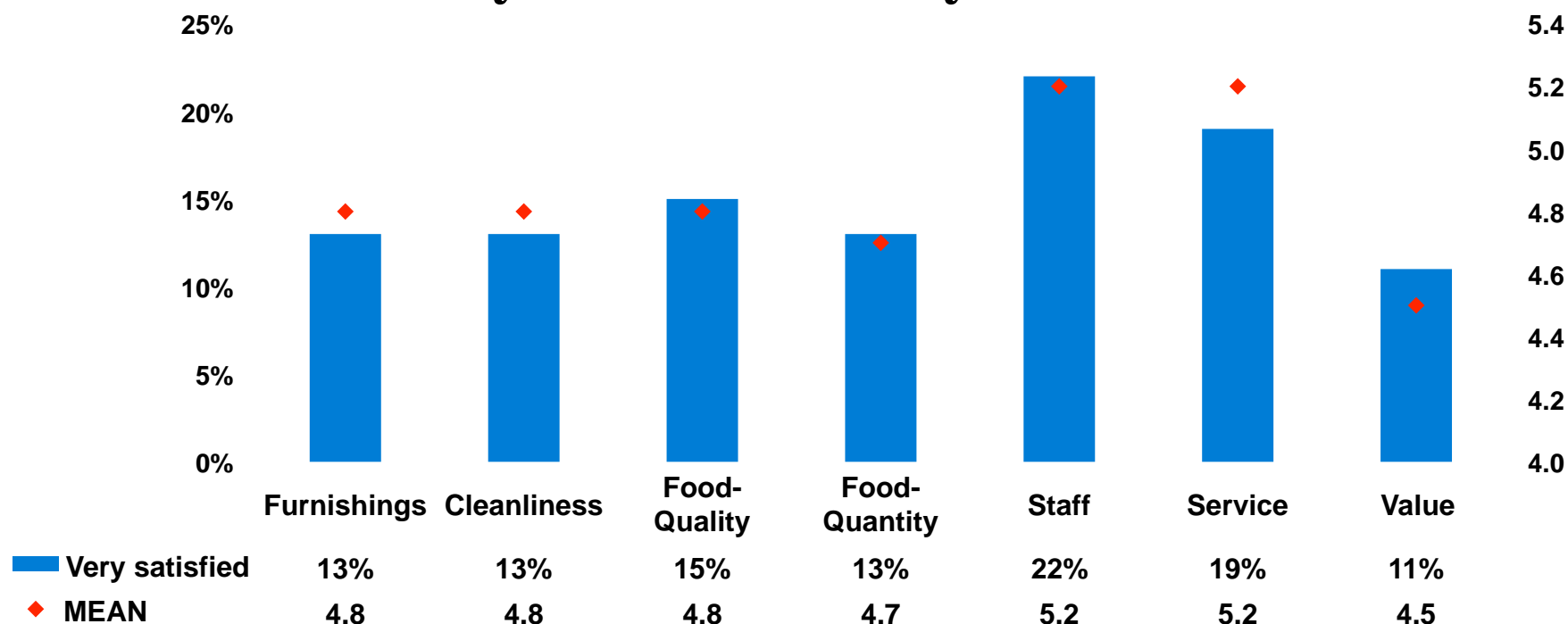
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

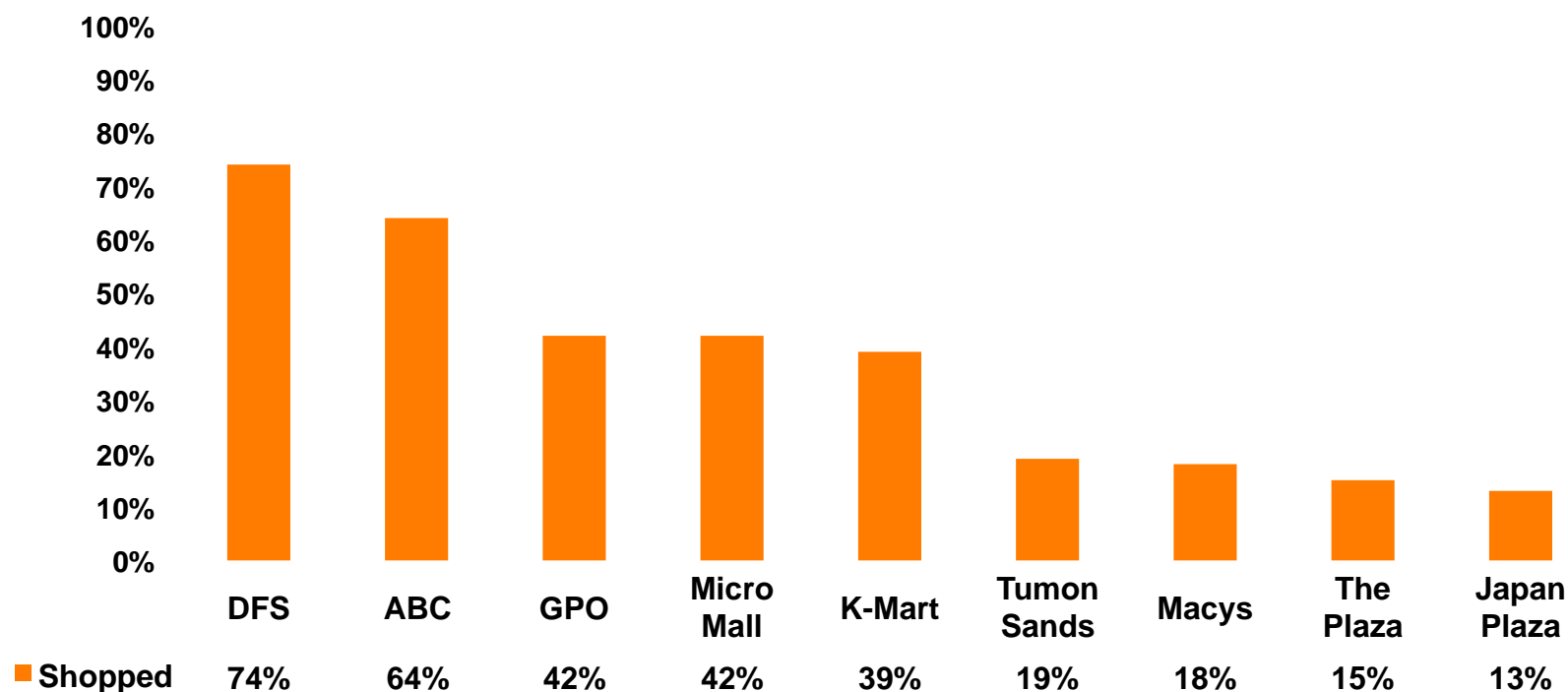
7pt Rating Scale

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

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

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

Score 1 to 3 = **14%**

MEAN = 4.9

Variety of Shopping

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

Score of 4 to 5 = **41%**

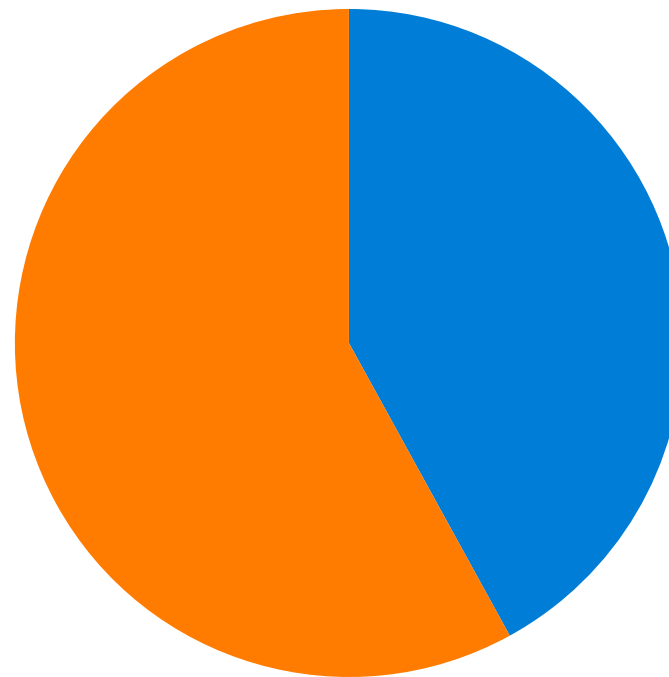
Score 1 to 3 = **18%**

MEAN = 4.8

Optional Tour Participation

- Average number of tours participated in is 1.1

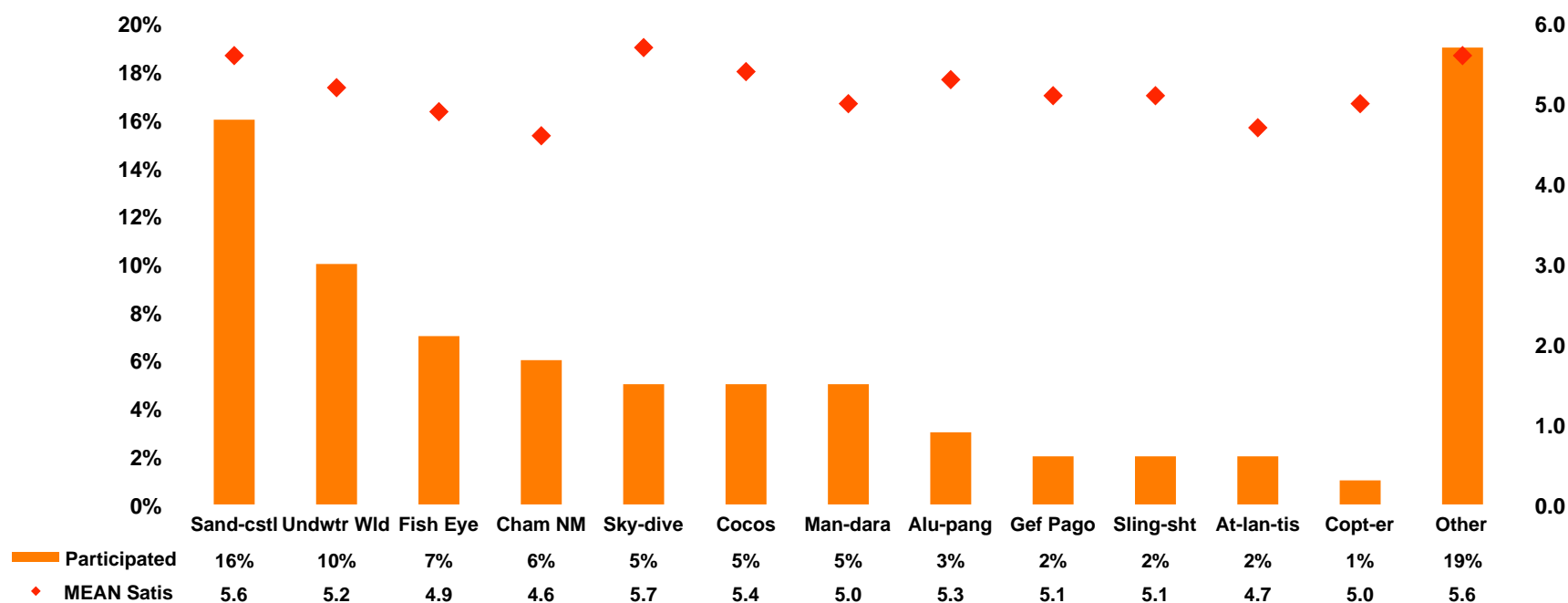
**One or more
58%**



**None
42%**

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 = **44%**

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

Score 1 to 3 = **8%**

MEAN = 5.1

Variety of Day Tour

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

Score of 4 to 5 = **56%**

Score 1 to 3 = **12%**

MEAN = 4.8

Night Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

∴

Quality of Night Tour

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

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

Score 1 to 3 = **16%**

MEAN = 4.5

Variety of Night Tour

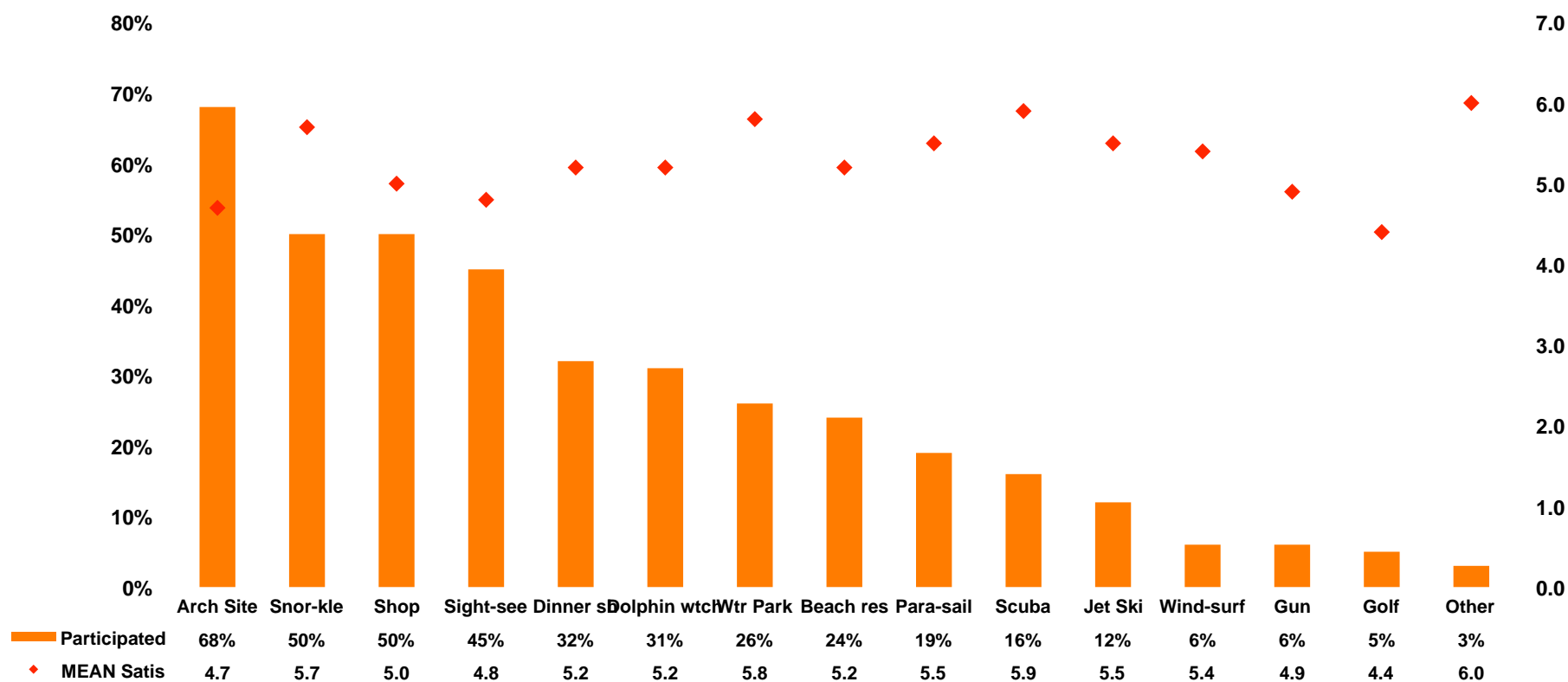
Score of 6 to 7 = **23%**

Score of 4 to 5 = **57%**

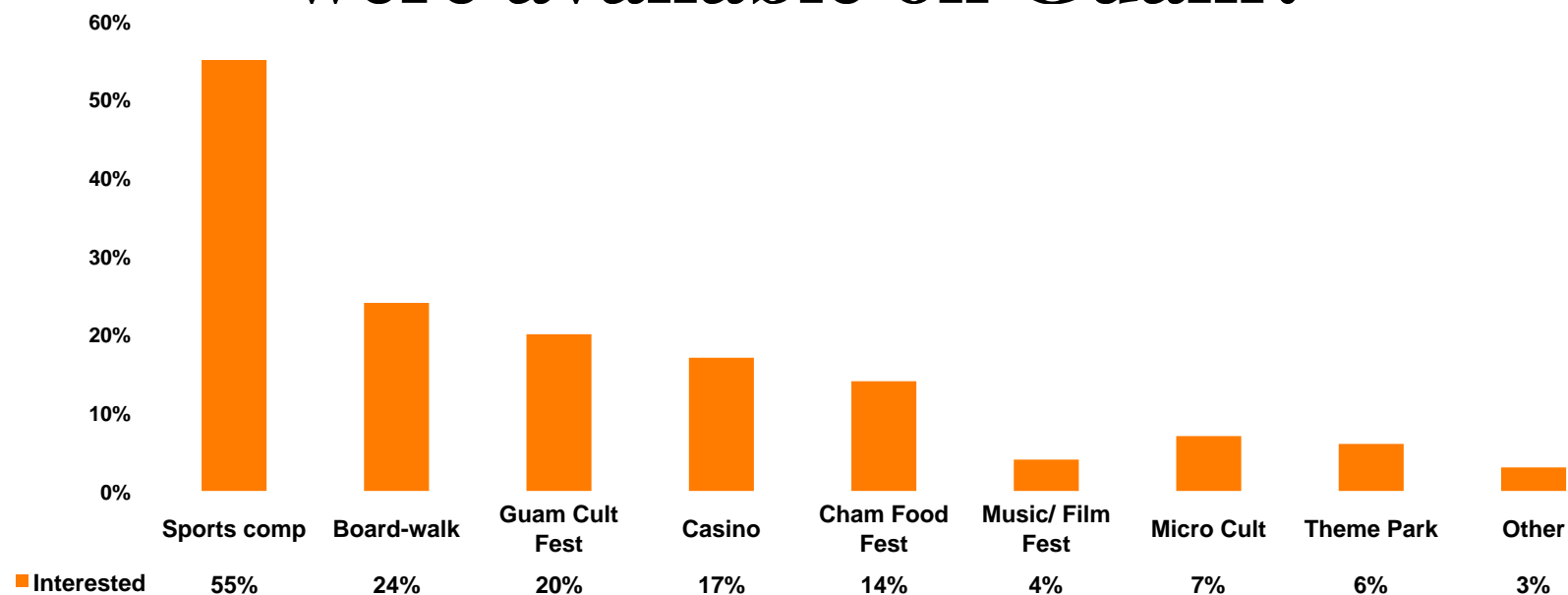
Score 1 to 3 = **20%**

MEAN = 4.4

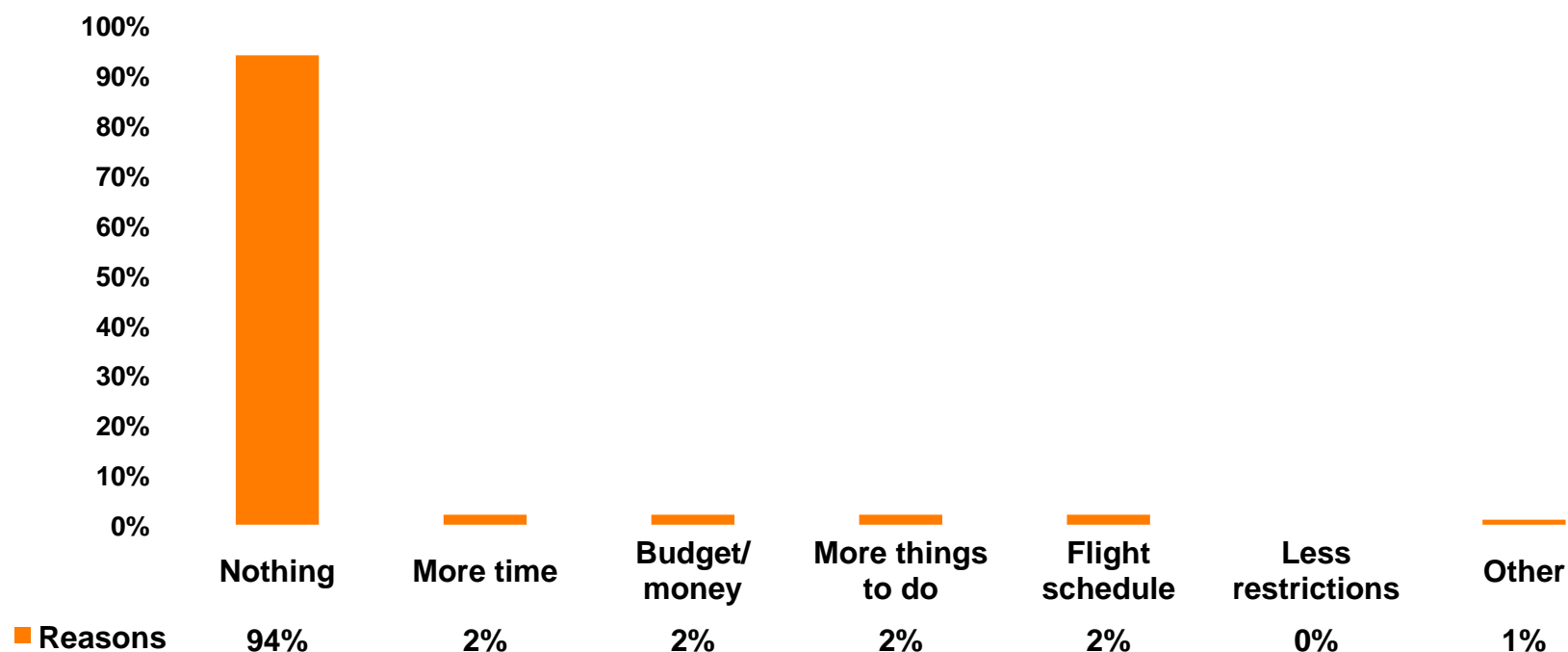
Satisfaction with Other Activities



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



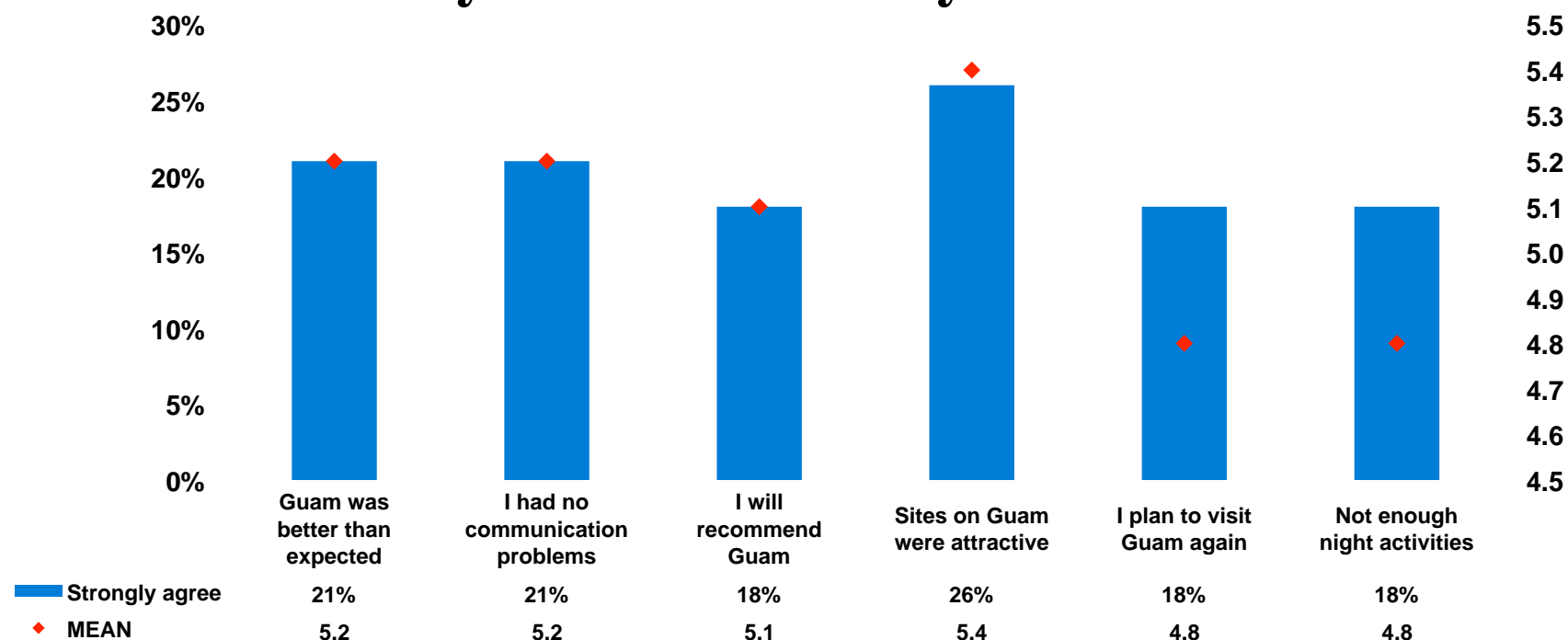
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

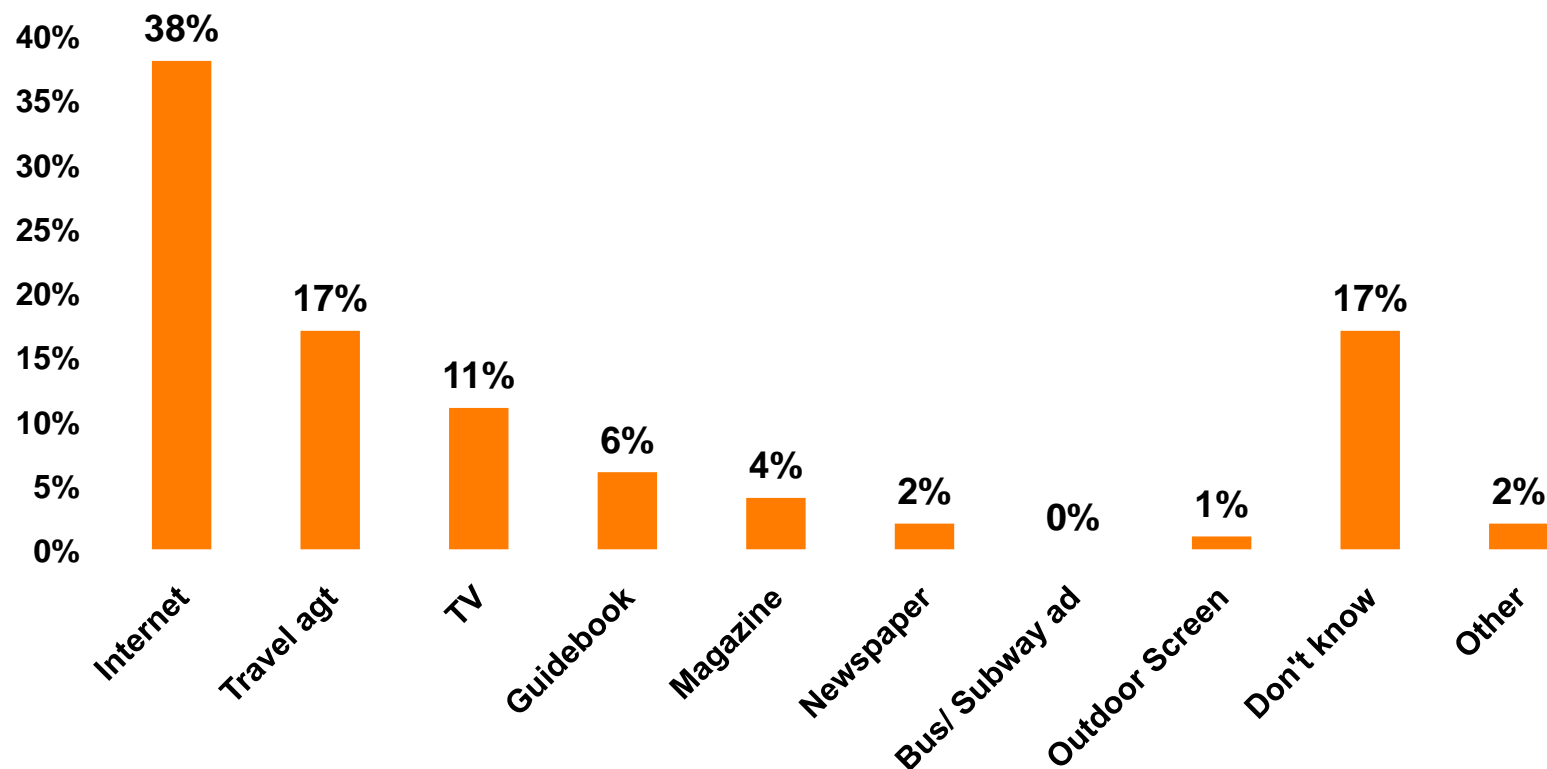
7=Very Satisfied/ 1=Very Dissatisfied



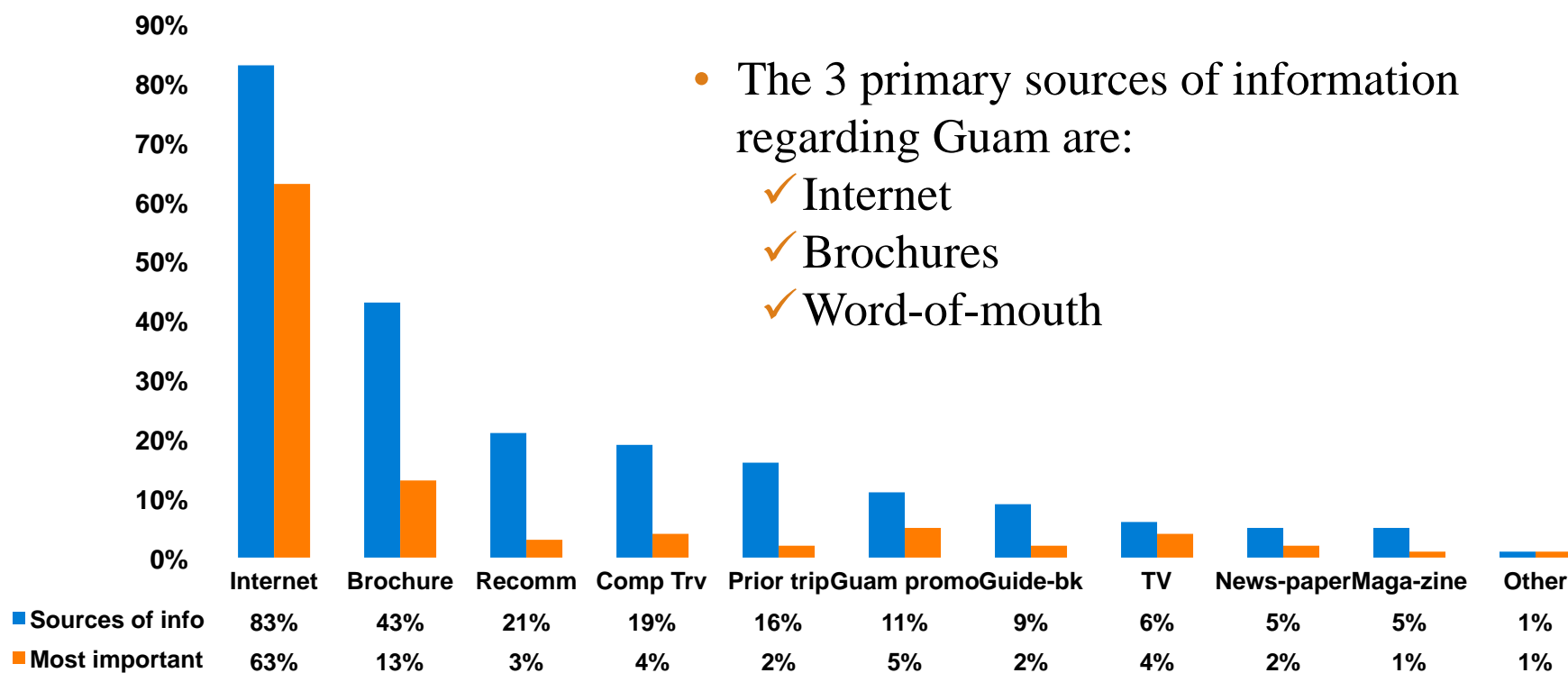
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

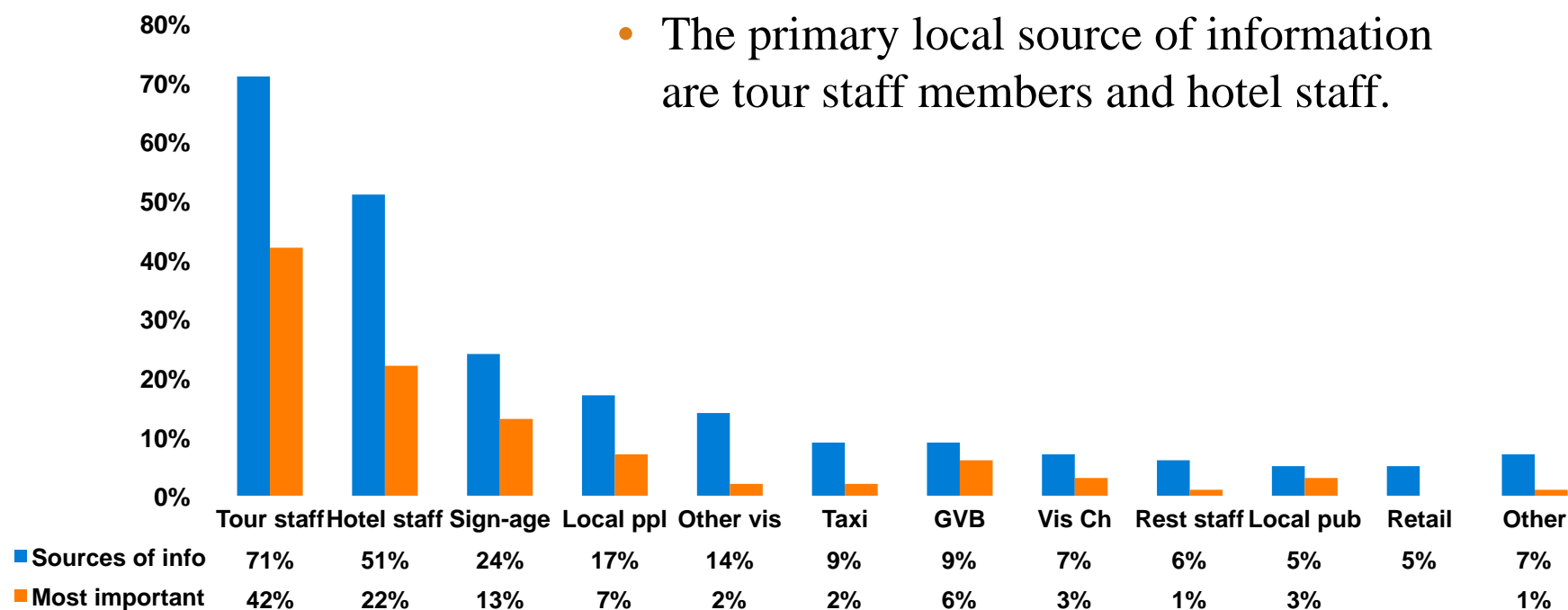


Sources of Information Pre-arrival



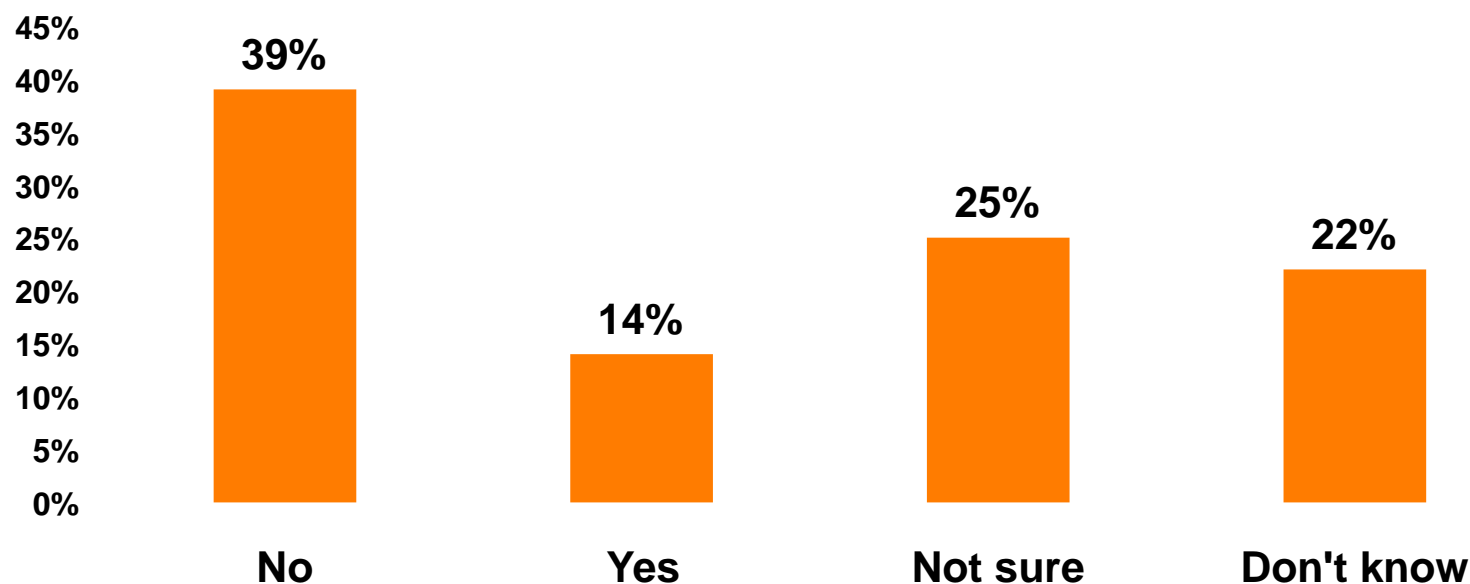
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

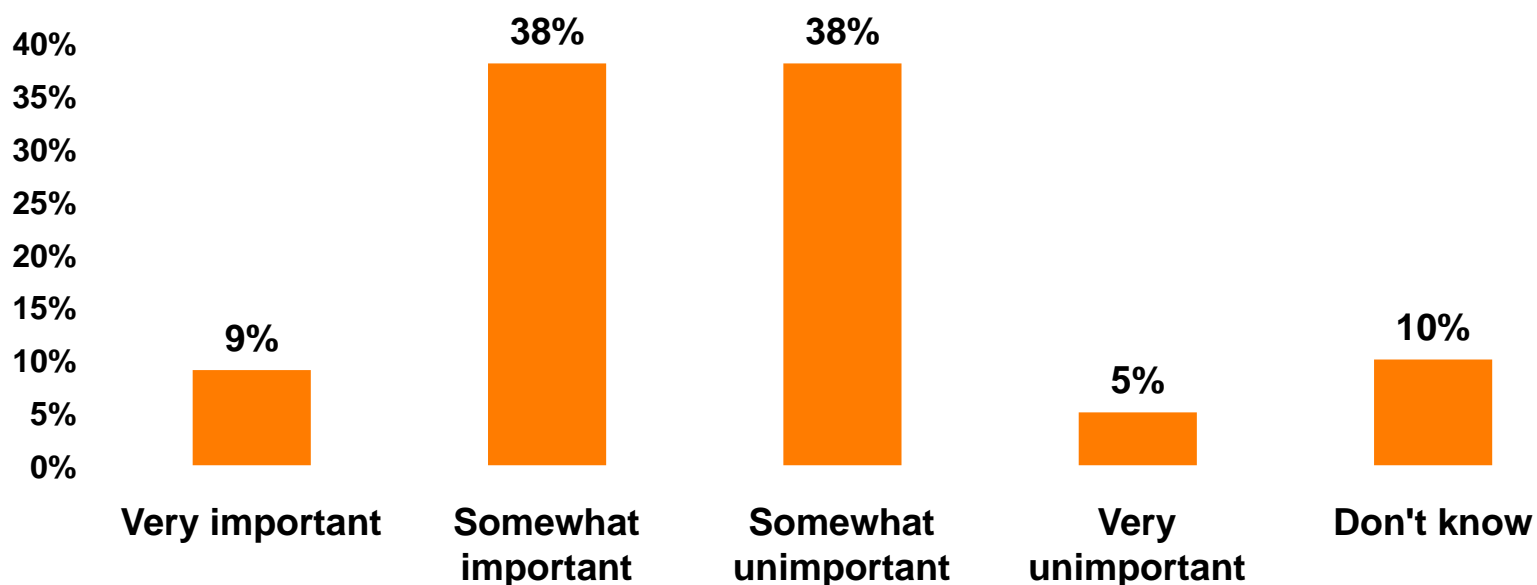
Good time to spend money on travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.22	No	43%	36%	35%	86%	46%	41%	41%	35%	11%
	Yes	10%	15%	18%	14%	14%	16%	12%	16%	11%
	Not sure	23%	24%	35%		11%	23%	26%	30%	22%
	Do not know	23%	25%	13%		29%	20%	21%	20%	55%
Total	Count	86	204	55	7	28	103	105	101	9

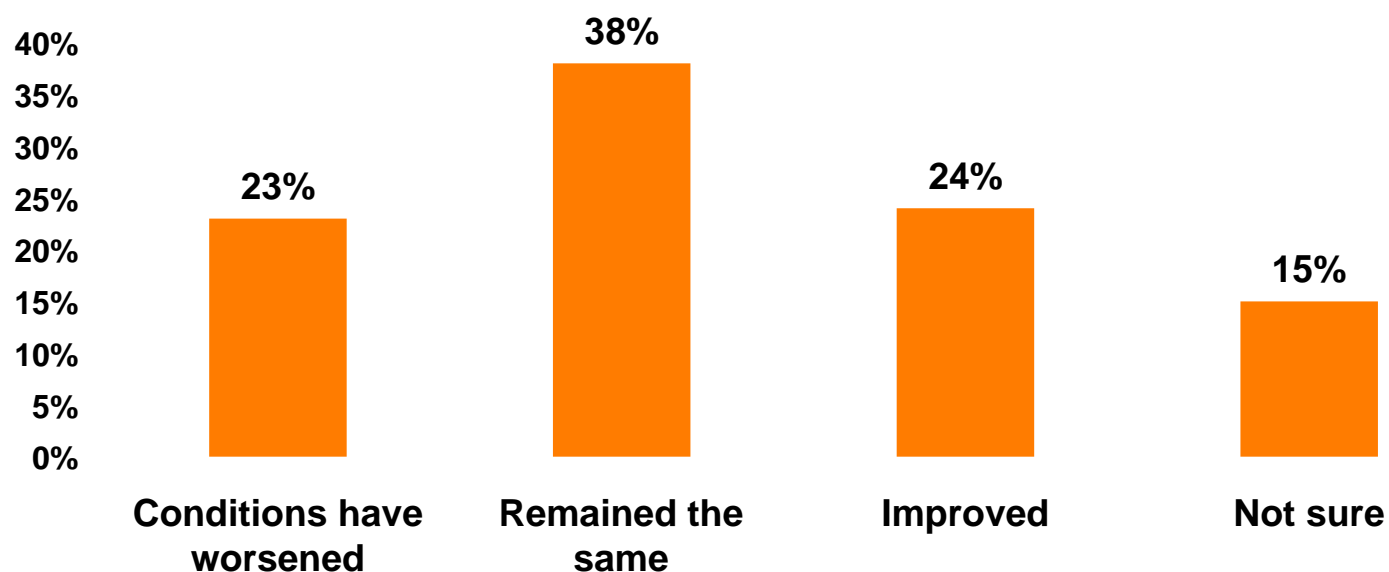
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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

		AGE				PERSONAL INCOME				
		20-29	30-39	40-49	50+	<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.23	Very unimportant	2%	6%	5%		4%	4%	5%	7%	
	Somewhat unimportant	33%	40%	36%	29%	18%	44%	33%	43%	22%
	Somewhat important	38%	37%	45%	43%	43%	35%	44%	34%	56%
	Very important	13%	7%	7%	29%	11%	7%	9%	10%	11%
	Don't know	14%	10%	5%		25%	10%	10%	7%	11%
Total	Count	85	204	55	7	28	102	105	101	9

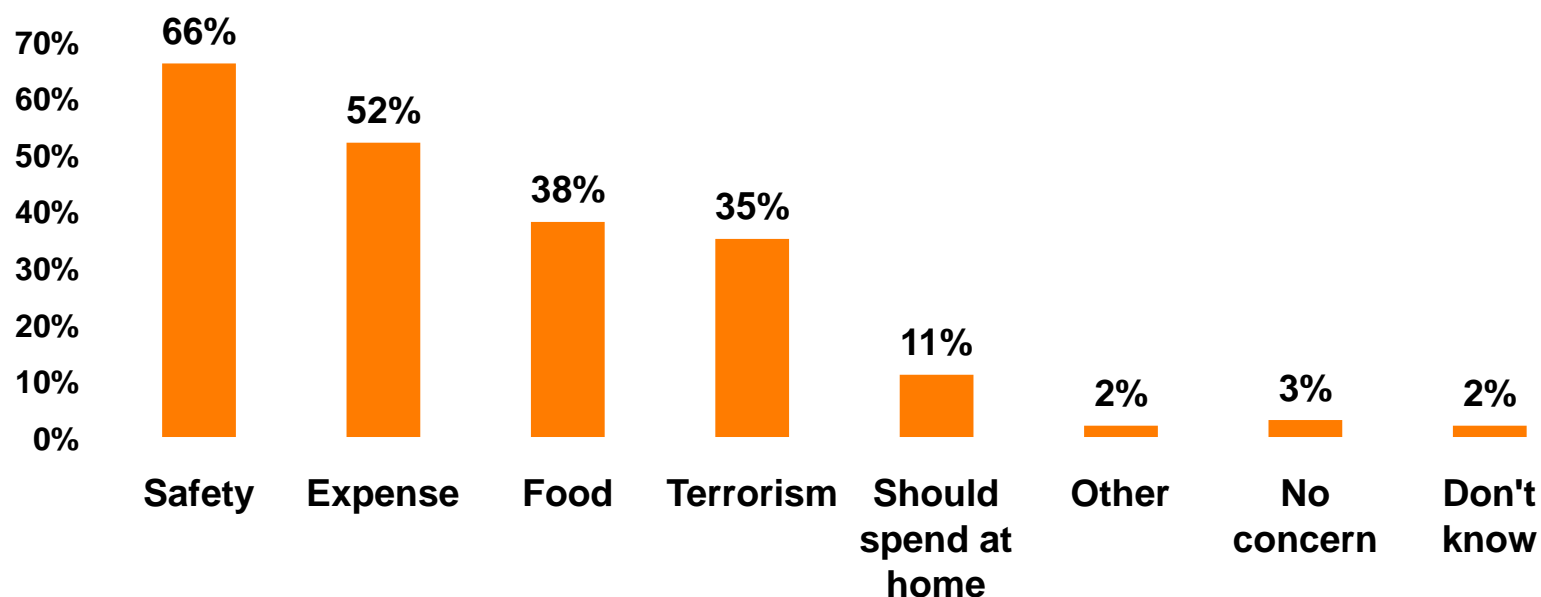
Rating Korean Economy Compared to 12 months ago



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	26%	22%	20%	57%	29%	26%	26%	16%	11%
	Conditions have remained the same	40%	40%	35%	14%	25%	45%	43%	32%	33%
	Conditions have improved	23%	21%	35%	29%	21%	18%	22%	33%	33%
	Do not know	12%	18%	11%		25%	11%	10%	20%	22%
Total	Count	86	204	55	7	28	103	105	101	9

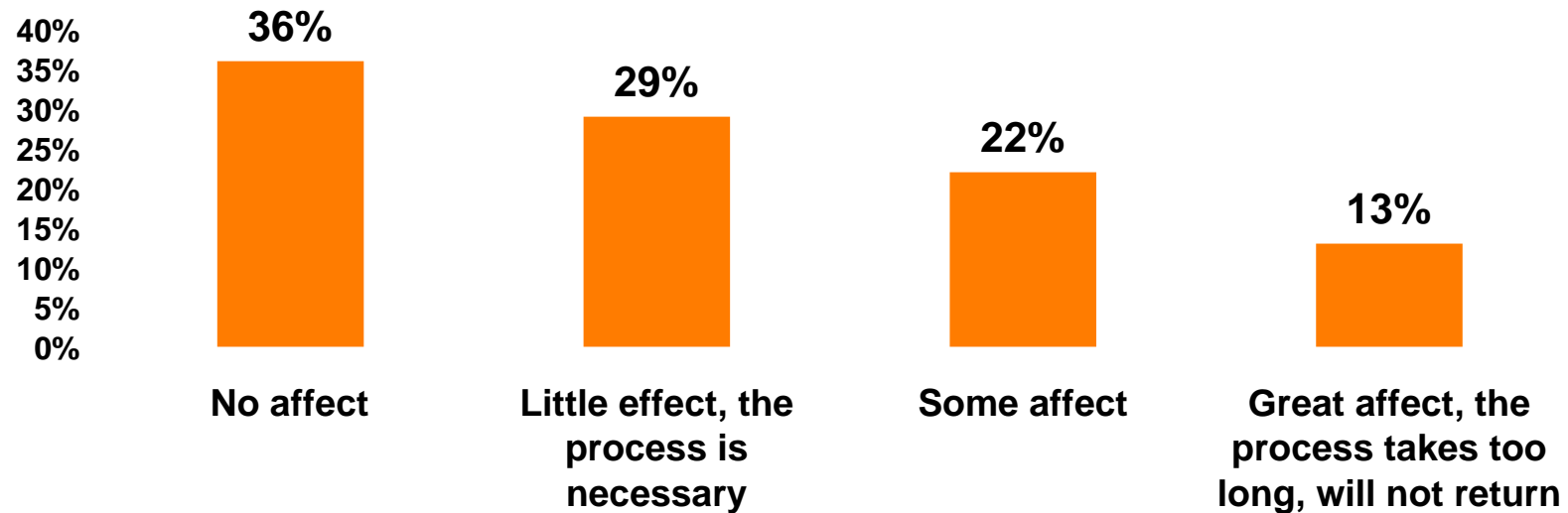
Concerns about travel outside of Korea - Overall



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	58%	68%	76%	57%	46%	66%	73%	67%	56%
	Expense	63%	50%	40%	71%	64%	55%	54%	43%	56%
	Food	44%	35%	40%	43%	64%	37%	36%	34%	44%
	Terrorism	29%	39%	31%	43%	32%	31%	38%	40%	22%
	Spending money abroad when it should be spent at home	14%	10%	5%	57%	7%	11%	14%	11%	
	No concerns	2%	3%	5%			3%	1%	7%	
	Other	2%	1%	4%			3%	2%	1%	11%
	Do not know	2%	2%				2%	1%	3%	
Total	Cases	86	204	55	7	28	103	105	101	9

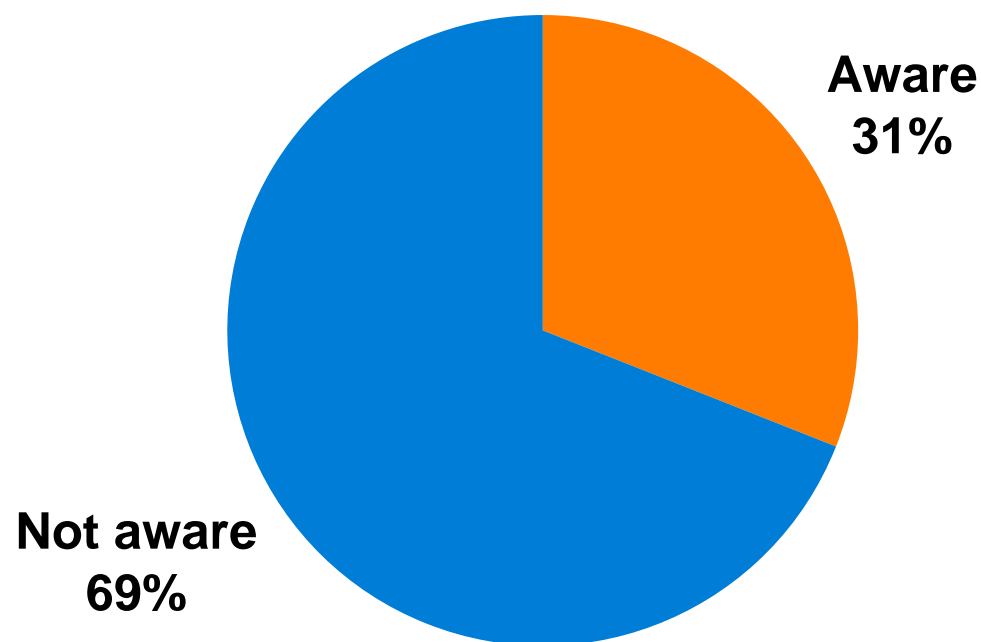
Security Screening/ Immigration Process at Guam International Airport



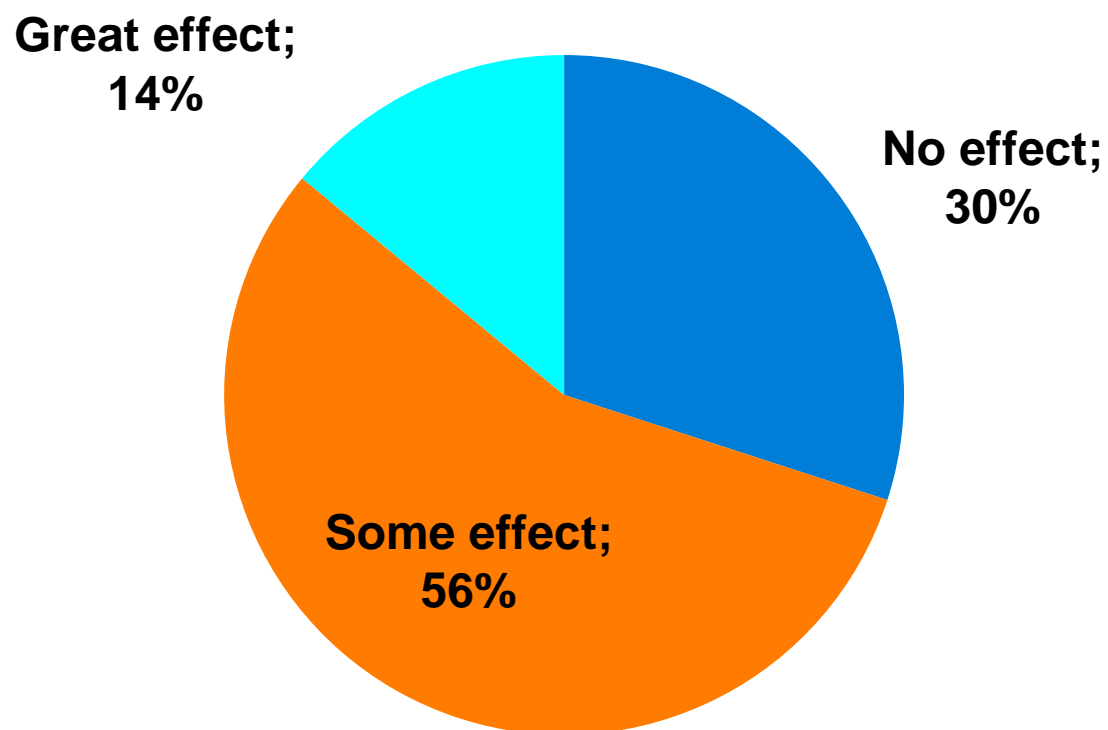
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **2.8** out of possible 7.0
- Agree (Score 6-7) – **11%**
- Neutral (Score 4-5) – **30%**
- Disagree (Score 1-3) – **59%**

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

