



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

SEPTEMBER 2011



Prepared by: QMark Research

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Background & Methodology

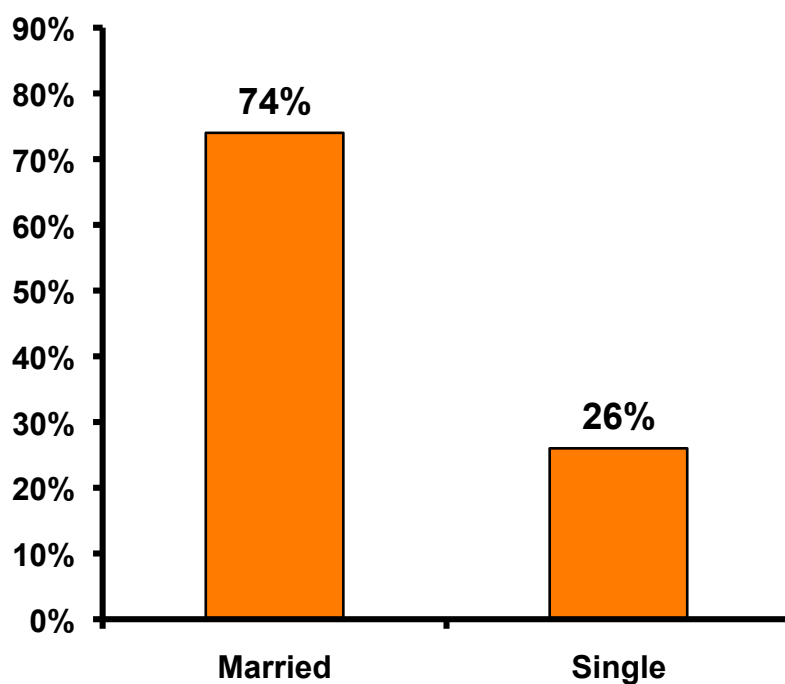
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Korean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

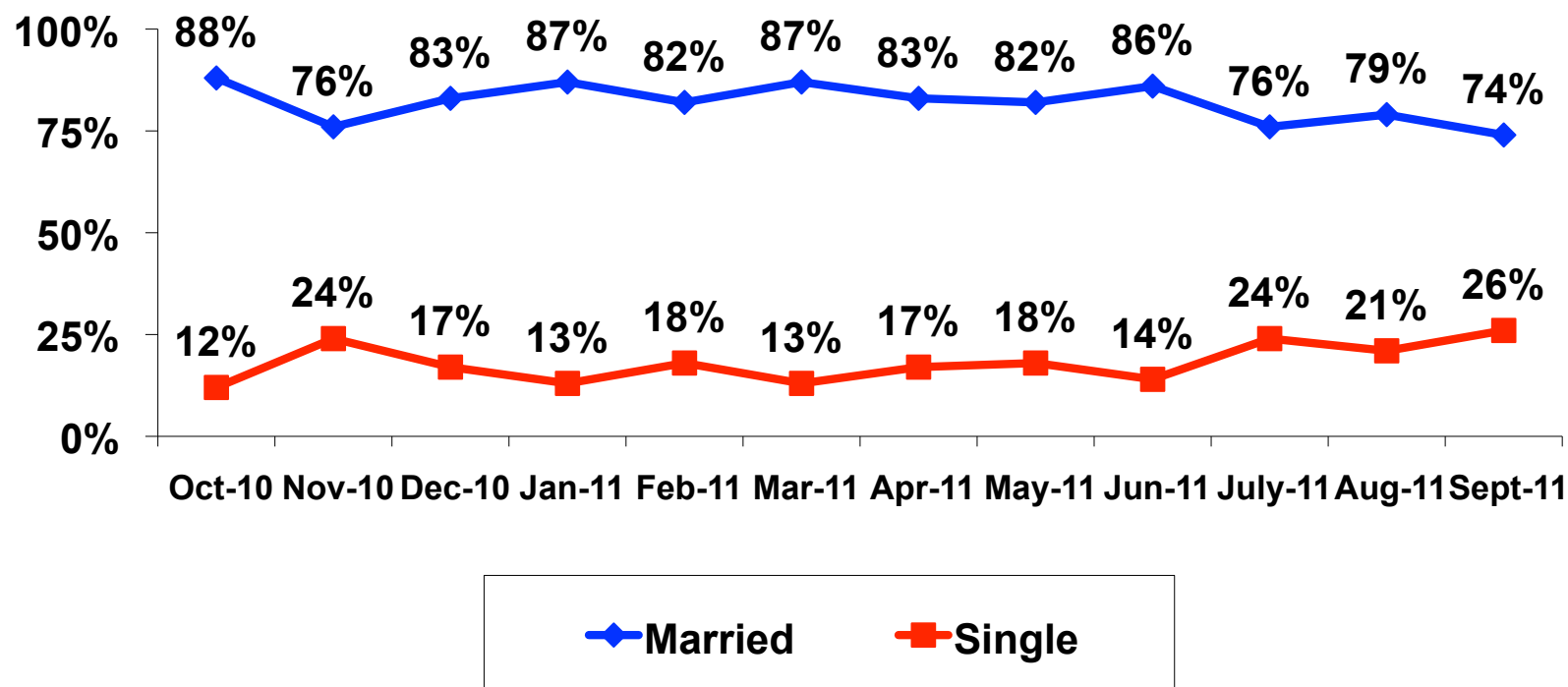
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

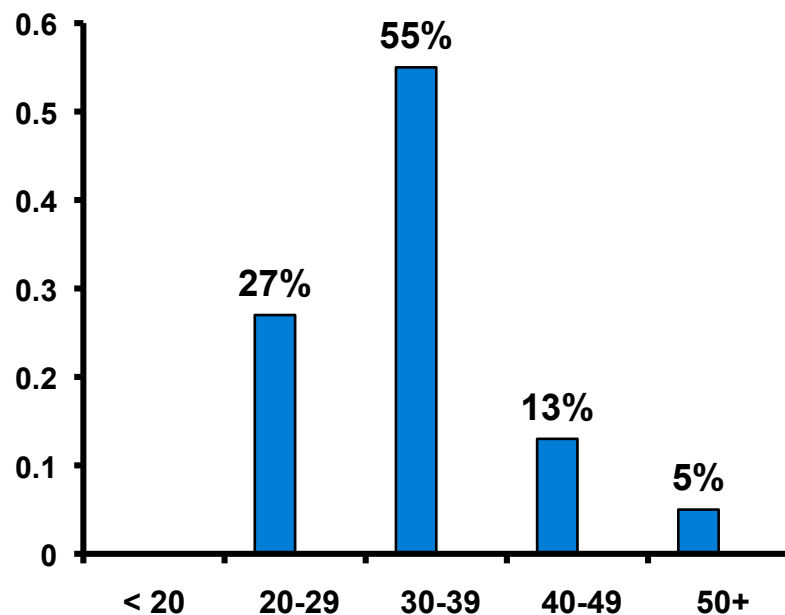


- A majority of visitors are married.

Marital Status

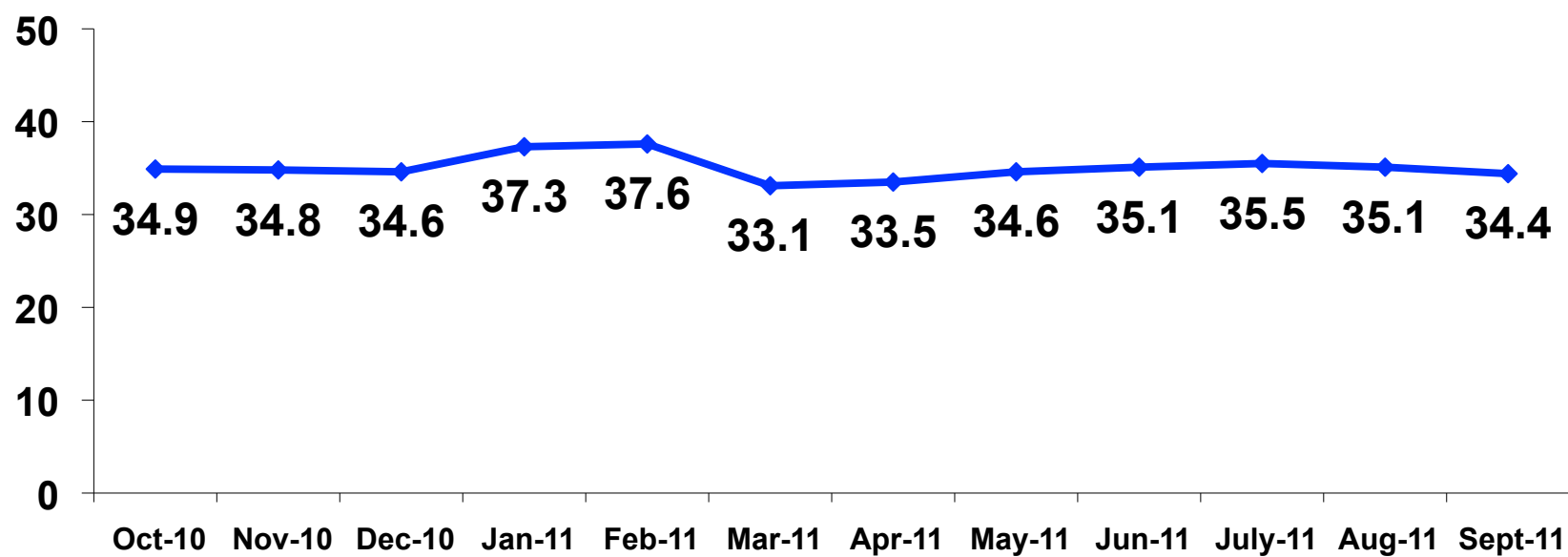


Age - Overall

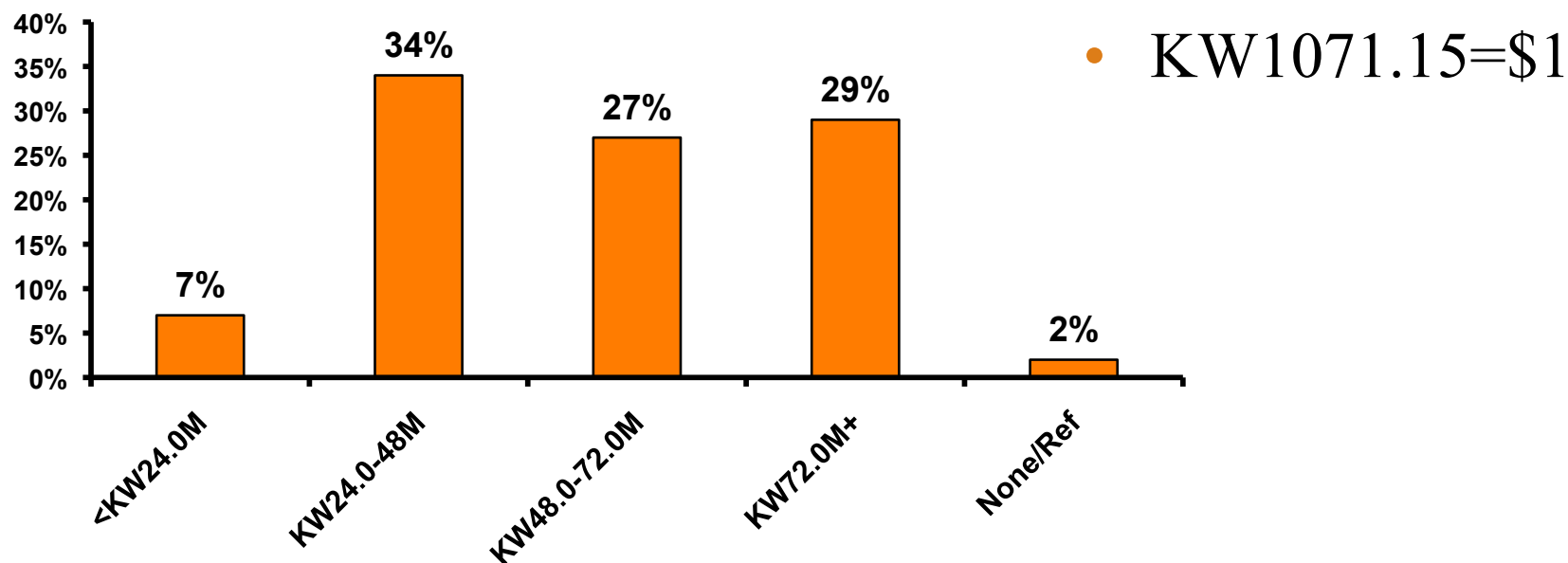


- The average age of the respondents is 34.4 years of age.

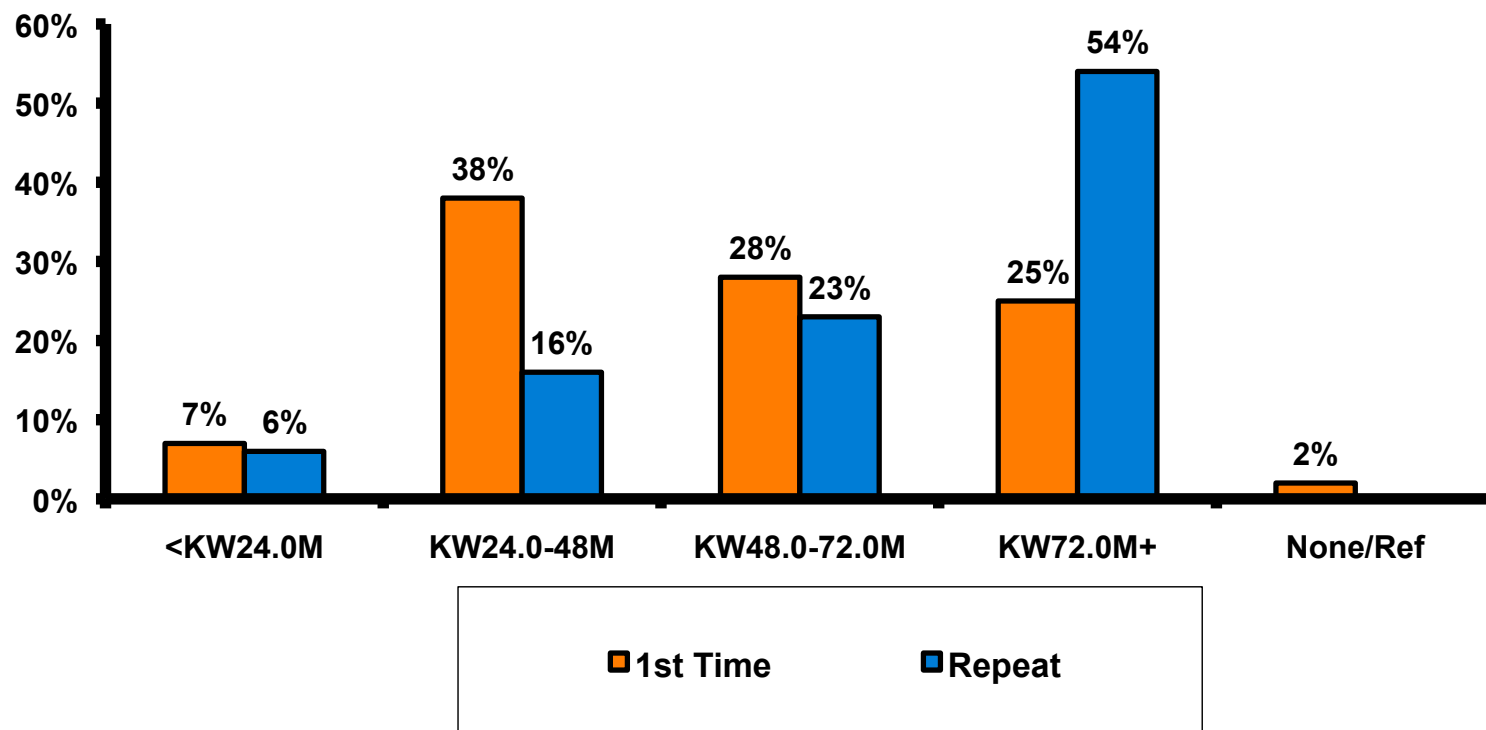
Average Age



Personal Income



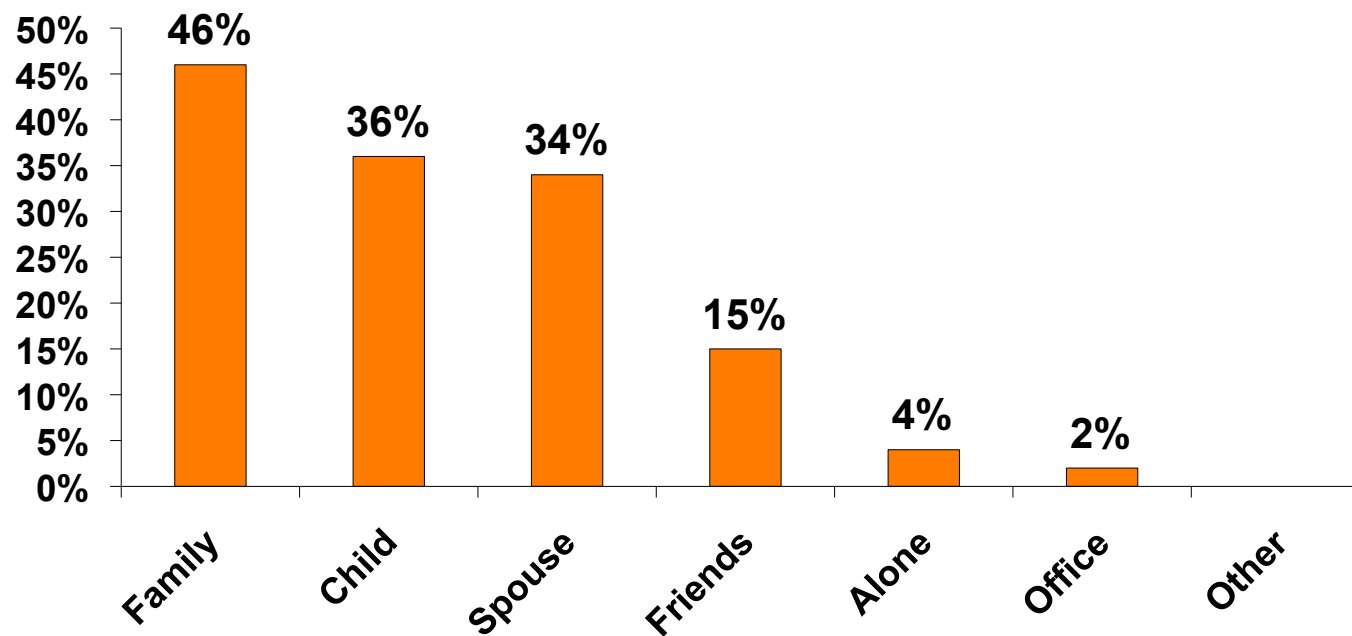
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
				Male	Female	20-29	30-39	40-49	50+
PERSONAL INCOME	<KW24.0M	Count	24	9	15	15	8		1
			7%	6%	9%	16%	4%		6%
	KW24.0M-KW48.0M	Count	112	54	58	41	64	6	1
			34%	33%	35%	44%	35%	16%	6%
	KW48.0M-KW72.0M	Count	89	41	48	21	52	11	5
			27%	25%	29%	23%	29%	30%	31%
	KW72.0M+	Count	96	59	37	12	55	20	9
			29%	36%	23%	13%	30%	54%	56%
	Refused	Count	6		6	4	2		
			2%		4%	4%	1%		
Total	Count	327	163	164	93	181	37	16	

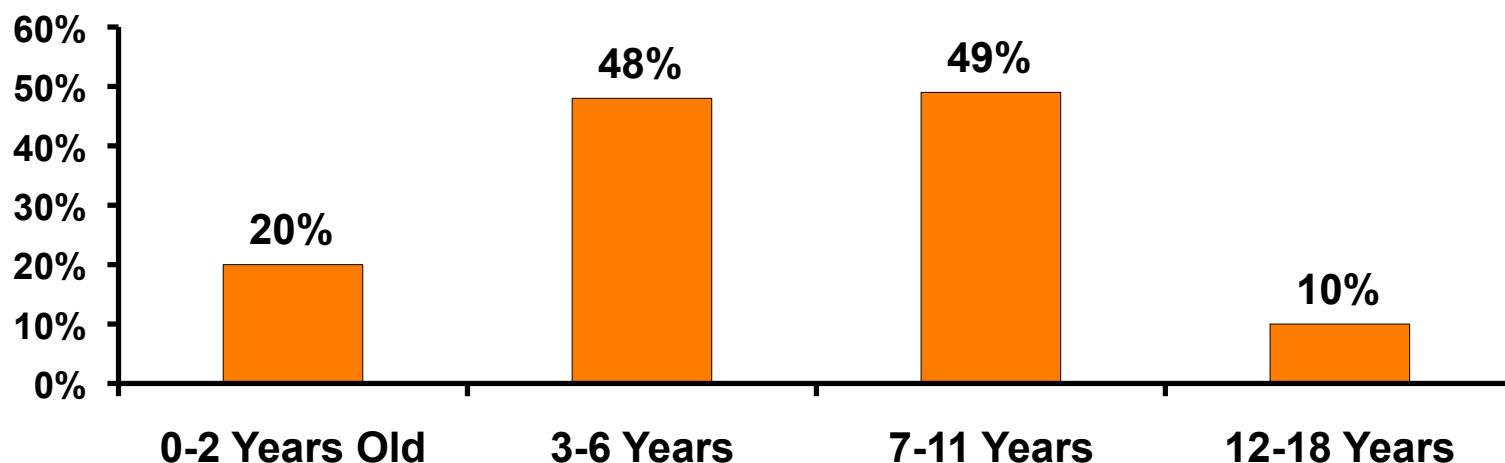
Travel Companions



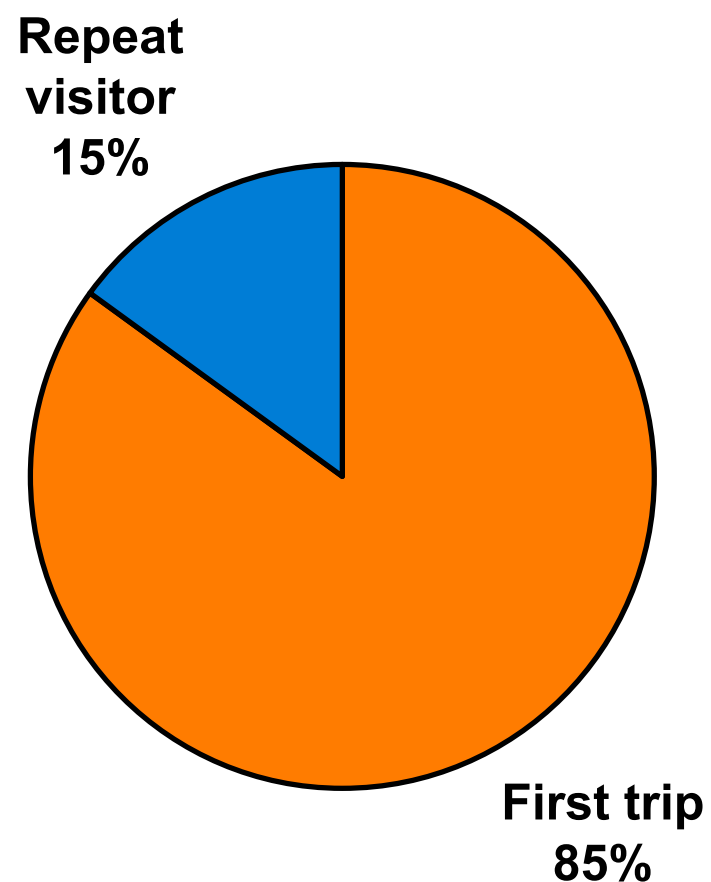
Number of Children Travel Party

N=125 total respondents traveling with children.

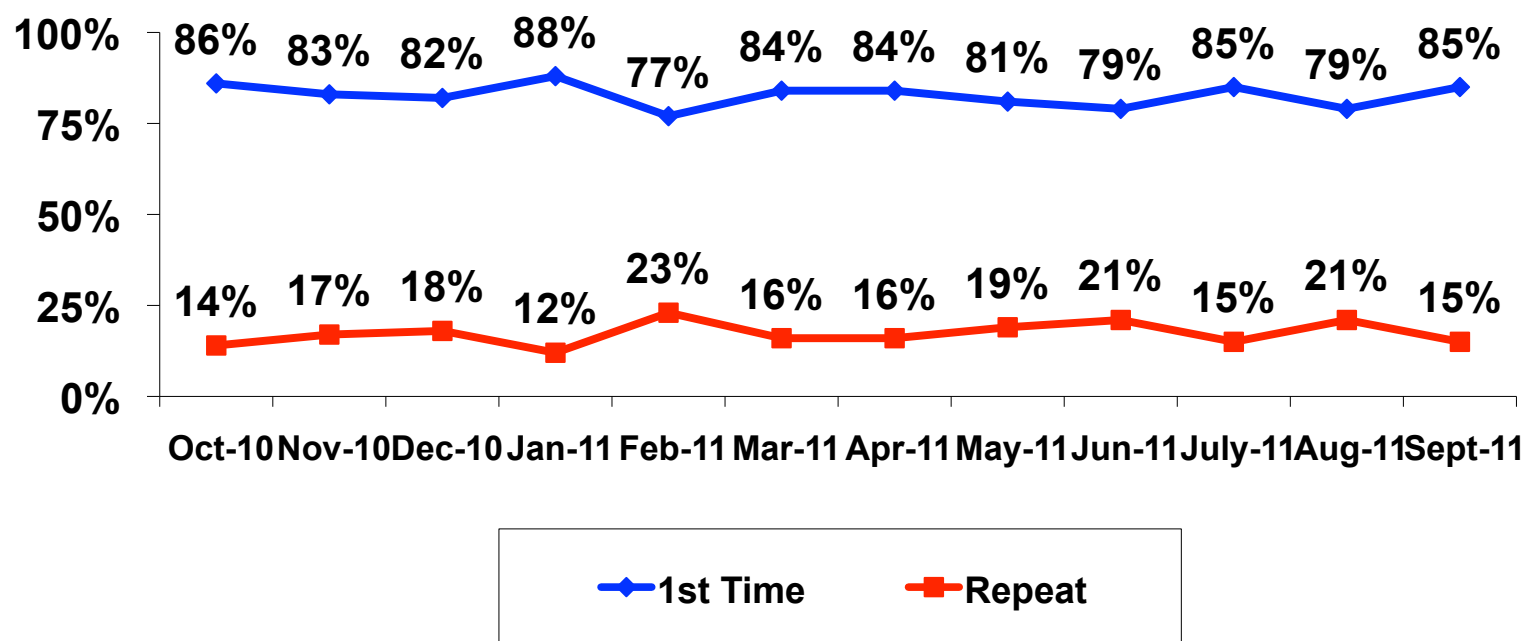
(Of those N=125 respondents, there is a total of 214 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



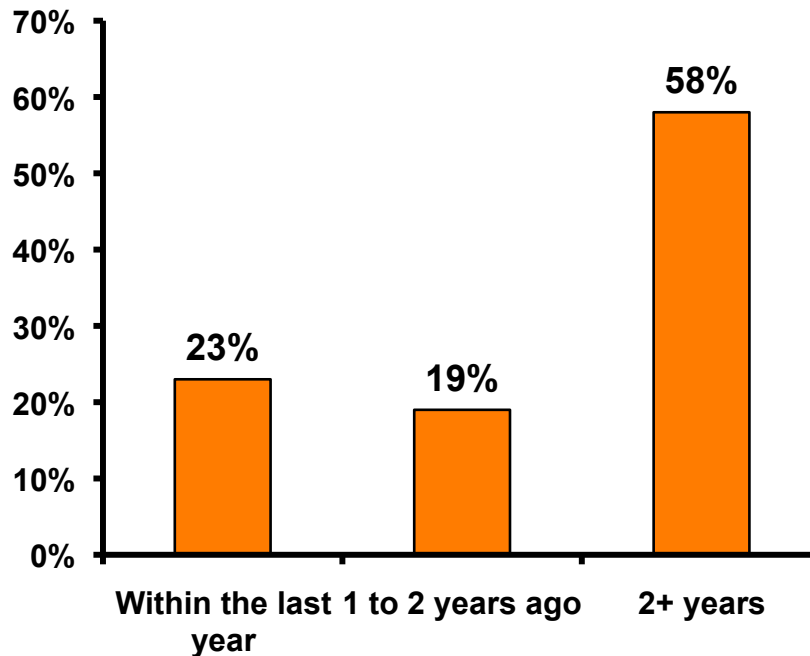
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
				1st	Repeat
GENDER	Male	Count	175	150	25
			50%	50%	47%
	Female	Count	177	149	28
			50%	50%	53%
Total	Count		352	299	53
AGE	20-29	Count	95	88	7
			27%	29%	13%
	30-39	Count	195	160	35
			55%	54%	66%
	40-49	Count	46	36	10
			13%	12%	19%
	50+	Count	16	15	1
			5%	5%	2%
Total	Count		352	299	53

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

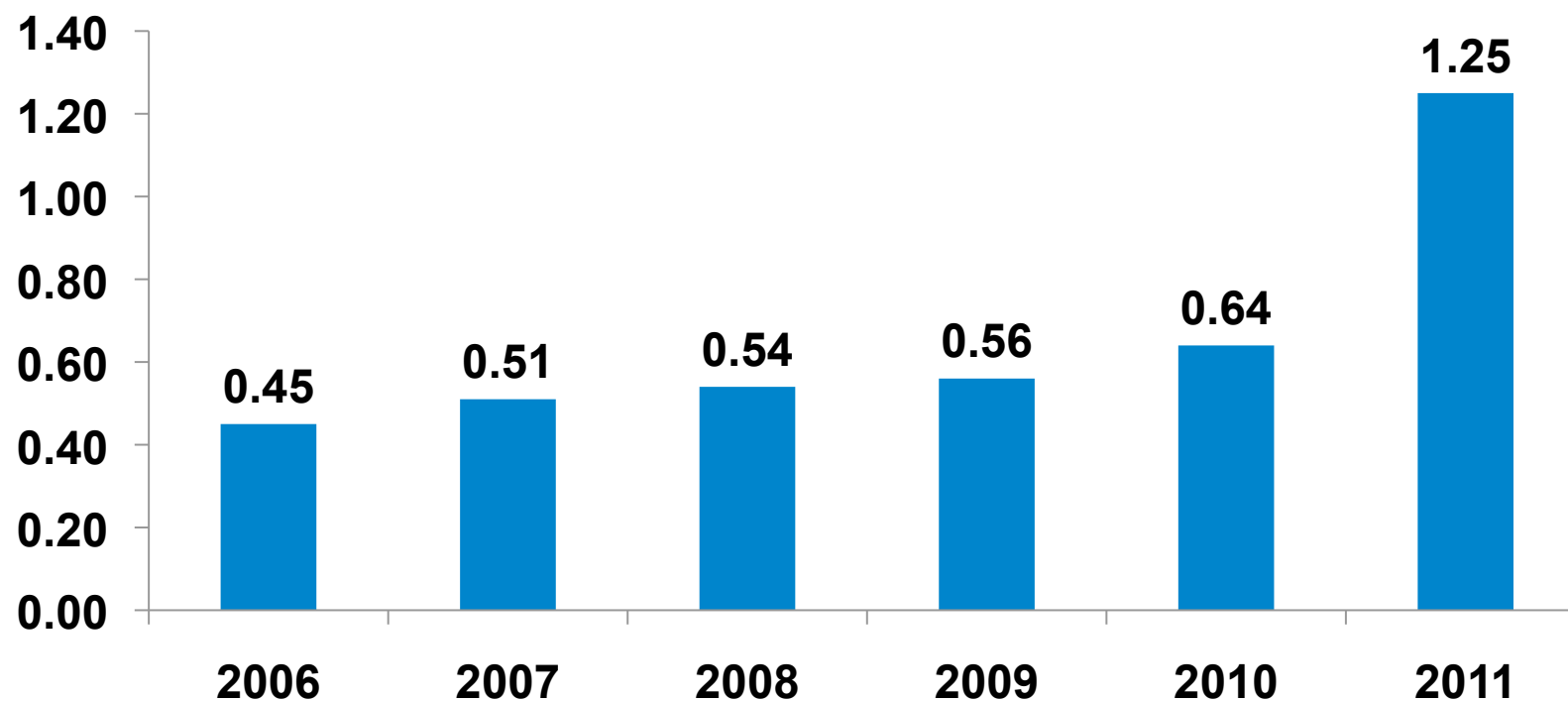
Repeat Visitors Last Trip

n = 53

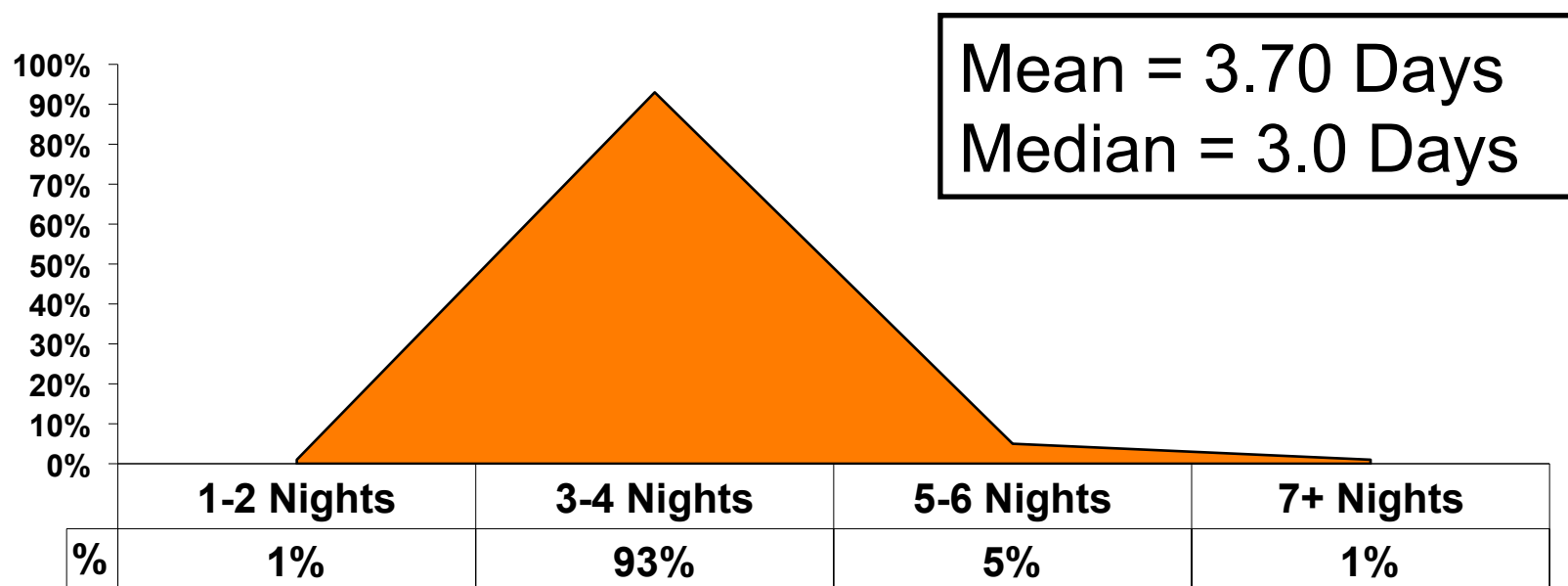


- The average repeat visitor has been to Guam 2.4 times.
- For many repeat visitors it has been at least 2 years since their last visit.

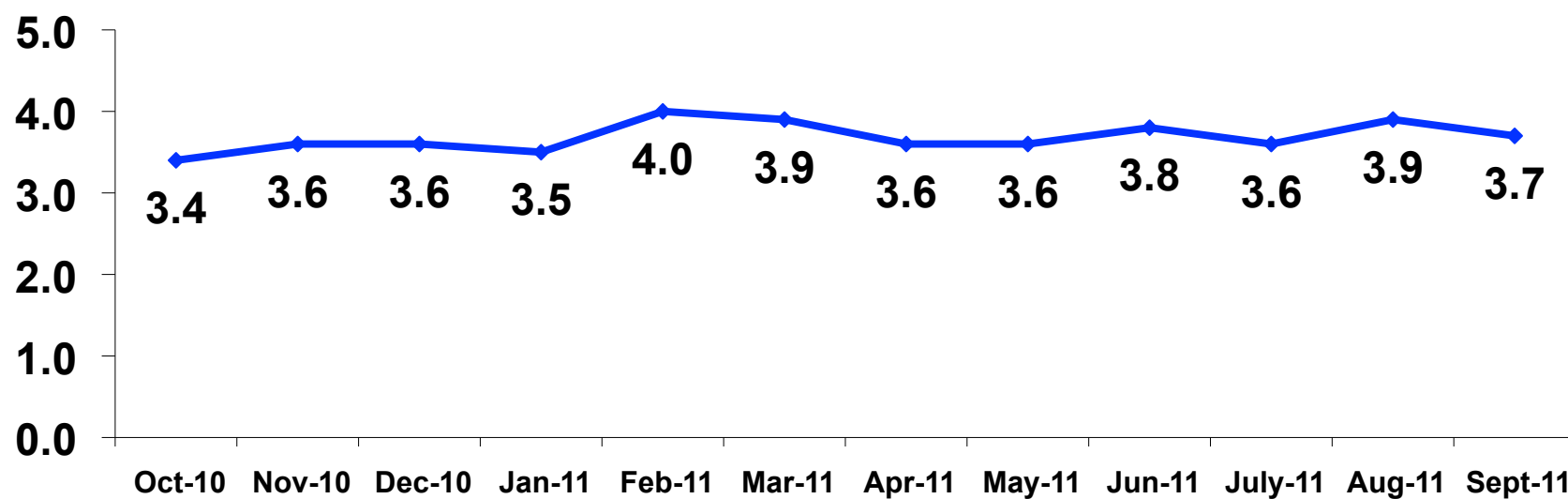
Average Number Overnight Trips (2006-2011) (2 nights or more)



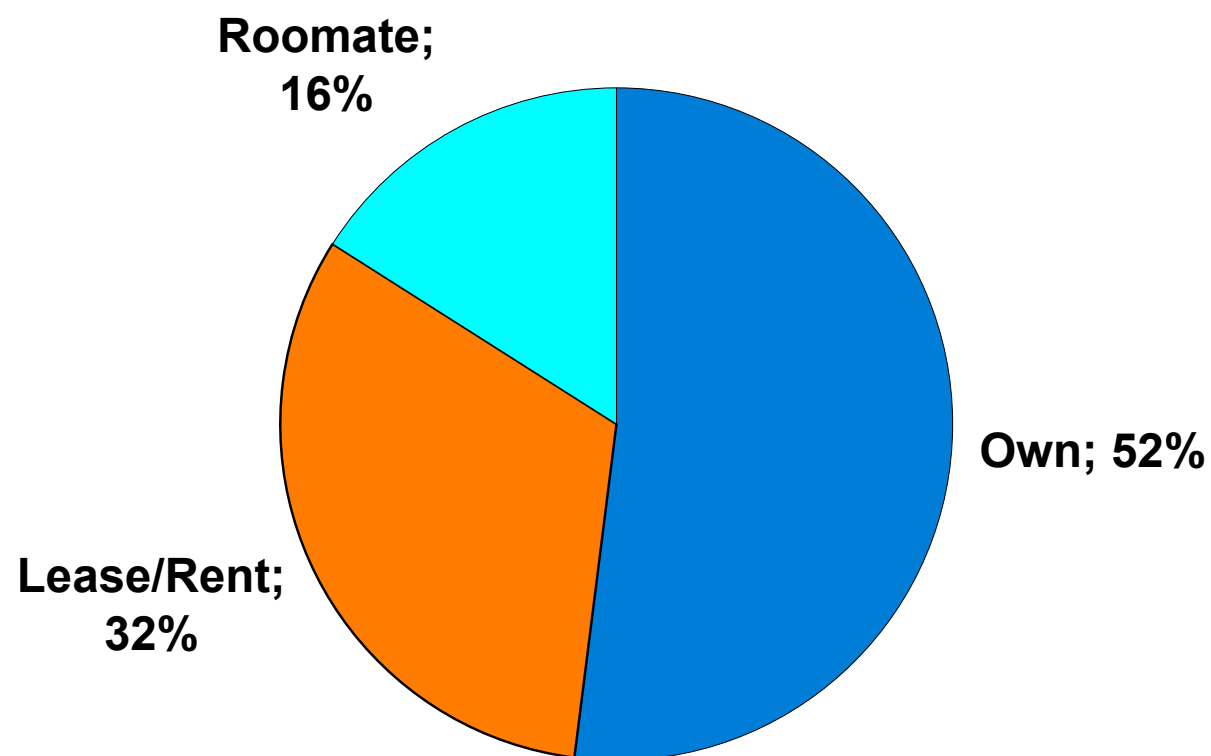
Length of Stay



Average Length of Stay



Living Accommodations

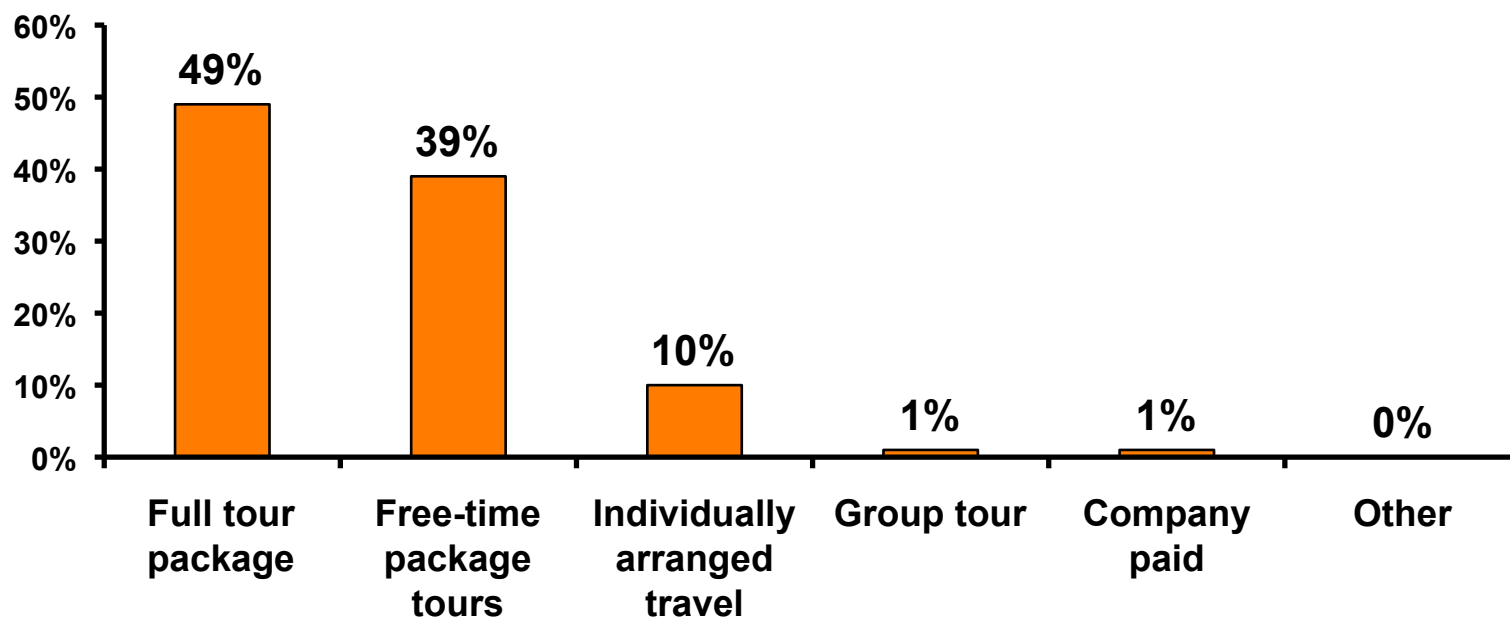


Occupation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.29	White Collar-Office	30%	30%	31%	21%	39%	60% 40% 5
	Self-employed	18%	22%	12%	26%	22%	
	Prof/Specialist/Tech	13%	4%	12%	18%	15%	
	Homemaker	12%	4%	10%	17%	6%	
	Manager	5%		6%	1%	8%	
	Service worker	4%	9%	9%	2%	1%	
	Professor/Teacher	4%		5%	6%	1%	
	Unemployed	3%		2%		2%	
	Student	2%	13%	1%		1%	
	Free-lancer	2%		2%	2%	2%	
	Govt - Office/non-mgr	1%	4%	3%	1%		
	Skilled worker	1%		2%	2%		
	Sales/Clerical	1%	4%	3%			
	Govt-Mgr	1%		2%	1%	1%	
	Judicial	1%			1%	1%	
	Other	1%	4%	1%			
	Govt-Exec	0%			1%		
	Farmer	0%		1%			
	Retired	0%	4%				
Total	Count	341	23	111	89	95	

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

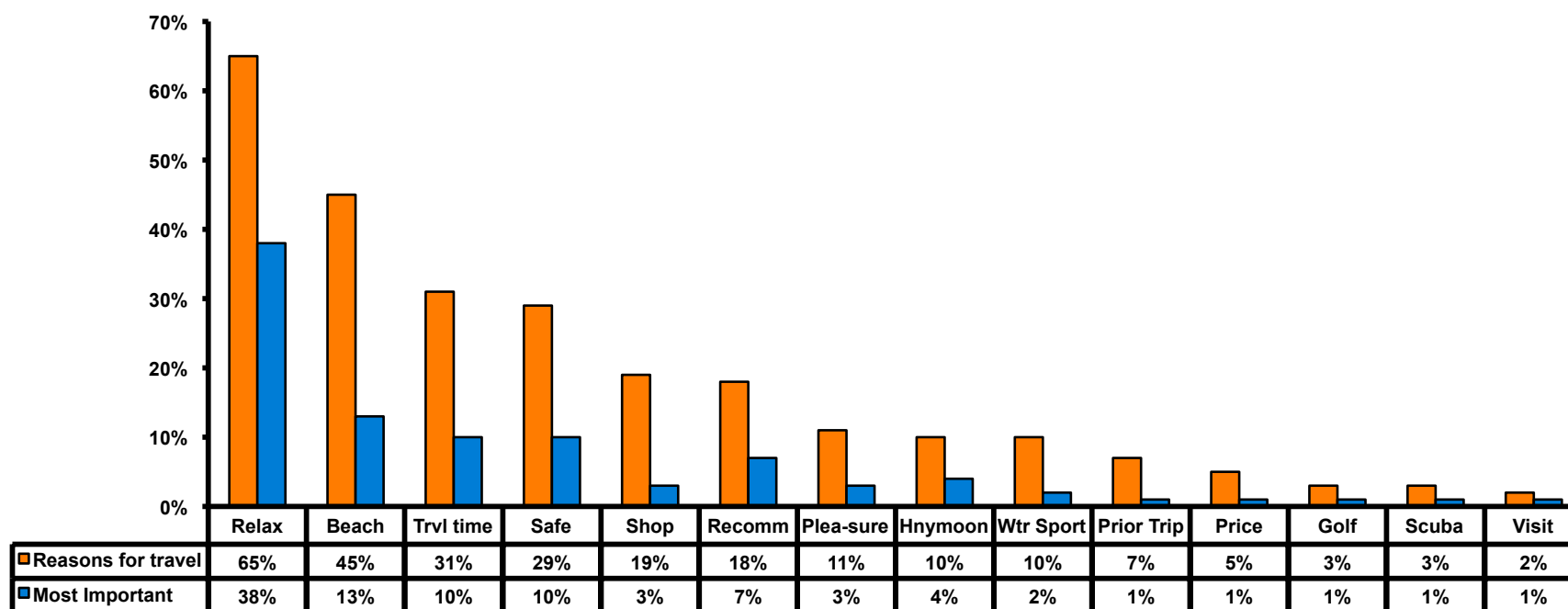


Accommodation by Income

Average length of stay: 3.70 days

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.9	Pacific Islands Club PIC	51%	58%	45%	49%	53%	17%
	Hyatt Regency Guam	14%	17%	16%	12%	13%	50%
	Sheraton Laguna Resort	7%	4%	5%	7%	8%	
	The Westin Resort Guam	6%	8%	4%	9%	5%	17%
	Hotel Nikko Guam	6%		6%	6%	6%	17%
	Hilton Guam Resort & Spa	5%		5%	7%	4%	
	Outrigger Guam Resort	3%	4%	4%	4%	3%	
	Onward Beach Resort	3%	8%	7%	2%		
	Bayview Hotel	1%		4%		1%	
	Holiday Resort Guam	1%		2%	1%	1%	
	Leo Palace Resort	1%			1%	2%	
	Guam Marriott Resort Hotel	1%		1%	1%		
	Relatives, Friends, Home Stay	1%				1%	
	Guam Reef Hotel	0%		1%			
	Days Inn Maite	0%				1%	
	Fiesta Resort Guam	0%		1%			
	Hotel Sane Fe	0%				1%	
Total	Count	351	24	112	89	96	6

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- The desire to relax,
 - Guam's natural beauty/ beaches and
 - Short travel time/ Safe destination
- 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	65%	54%	69%	70%	69%	63%	67%
	Beautiful seas, beaches, tropical climate	45%	45%	44%	39%	63%	41%	49%
	Short travel time	31%	28%	34%	22%	25%	29%	33%
	It is a safe place to spend a vacation	29%	25%	30%	28%	31%	27%	31%
	Shopping	19%	22%	20%	11%	6%	17%	20%
	Recommendation of friend, relative, travel agency	18%	15%	21%	20%	6%	13%	24%
	Pleasure	11%	16%	11%	9%		10%	13%
	Honeymoon	10%	13%	12%			13%	7%
	Water sports	10%	16%	8%	11%		9%	11%
	A previous visit	7%	3%	9%	9%	6%	6%	8%
	Price of the tour package	5%	8%	6%			3%	7%
	To golf	3%	2%	1%	11%	13%	3%	3%
	SCUBA diving	3%	3%	1%	9%	6%	5%	1%
	To visit friends or relatives	2%	2%	2%	2%	6%	3%	2%
	Promotional materials from GVB	2%		3%	2%	6%	2%	2%
	My company sponsored me	2%	2%	1%	7%		3%	1%
	Other	2%	2%	2%			2%	1%
	Career certification or testing	1%	1%	1%	2%		1%	2%
	Organized Sporting Activity	1%		1%	2%		1%	1%
	Company or Business trip	1%		1%		6%	1%	
Special promotion	1%		1%			1%	1%	
Convention, Conference, Trade show	0%	1%				1%		
To get married or Attend wedding	0%		1%			1%		
Total	Cases	352	95	195	46	16	175	177

Motivation by Income

		TOTAL	PERSONAL INCOME				
			<KW24.0M	KW24.0M-KW48.0M	KW48.0M-KW72.0M	KW72.0M+	Refused
Q.5	Just to relax	65%	50%	53%	76%	70%	50%
	Beautiful seas, beaches, tropical climate	45%	50%	49%	47%	38%	100%
	Short travel time	31%	8%	30%	38%	32%	33%
	It is a safe place to spend a vacation	29%	13%	28%	30%	32%	50%
	Shopping	19%	29%	14%	28%	17%	
	Recommendation of friend, relative, travel agency	18%	25%	25%	18%	11%	
	Pleasure	11%	13%	9%	16%	13%	
	Honeymoon	10%	17%	15%	9%	7%	
	Water sports	10%	4%	12%	10%	9%	
	A previous visit	7%	8%	2%	8%	13%	
	Price of the tour package	5%		4%	9%	5%	
	To golf	3%		2%	2%	6%	
	SCUBA diving	3%	4%	1%	3%	4%	
	To visit friends or relatives	2%		4%	1%	1%	
	Promotional materials from GVB	2%	4%	3%	1%	2%	
	My company sponsored me	2%	4%	1%		4%	
	Other	2%		4%		2%	
	Career certification or testing	1%			2%	1%	
	Organized Sporting Activity	1%			2%	1%	
	Company or Business trip	1%			1%	1%	
	Special promotion	1%		1%		1%	
	Convention, Conference, Trade show	0%		1%			
	To get married or Attend wedding	0%		1%			
Total	Cases	352	24	112	89	96	6

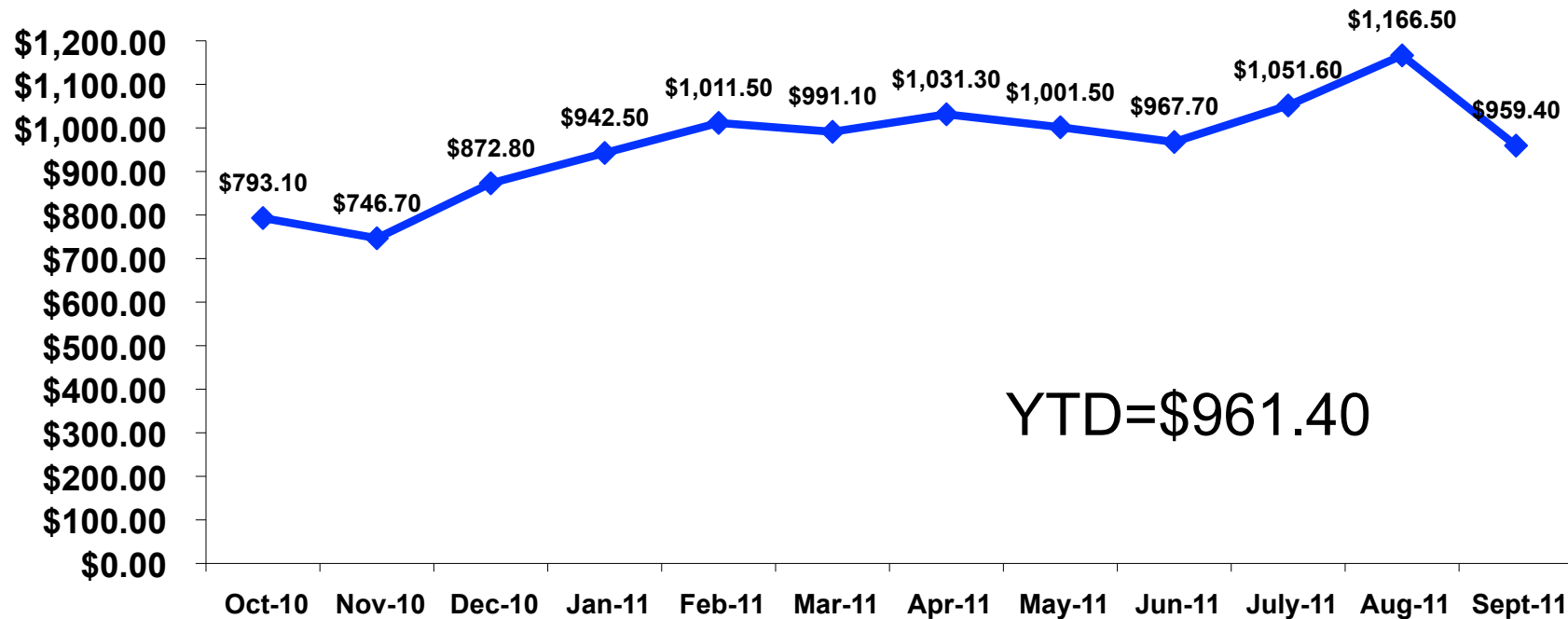
SECTION 3 **EXPENDITURES**

Prepaid Expenditures

KW1071.15/US\$1

- \$2,347.40 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$11,202 = maximum (highest amount recorded for the entire sample)
- \$959.40 = overall mean average per person prepaid expenditures

Prepaid Expenditures



Breakdown of Prepaid Expenditures

KW1071.15=\$1

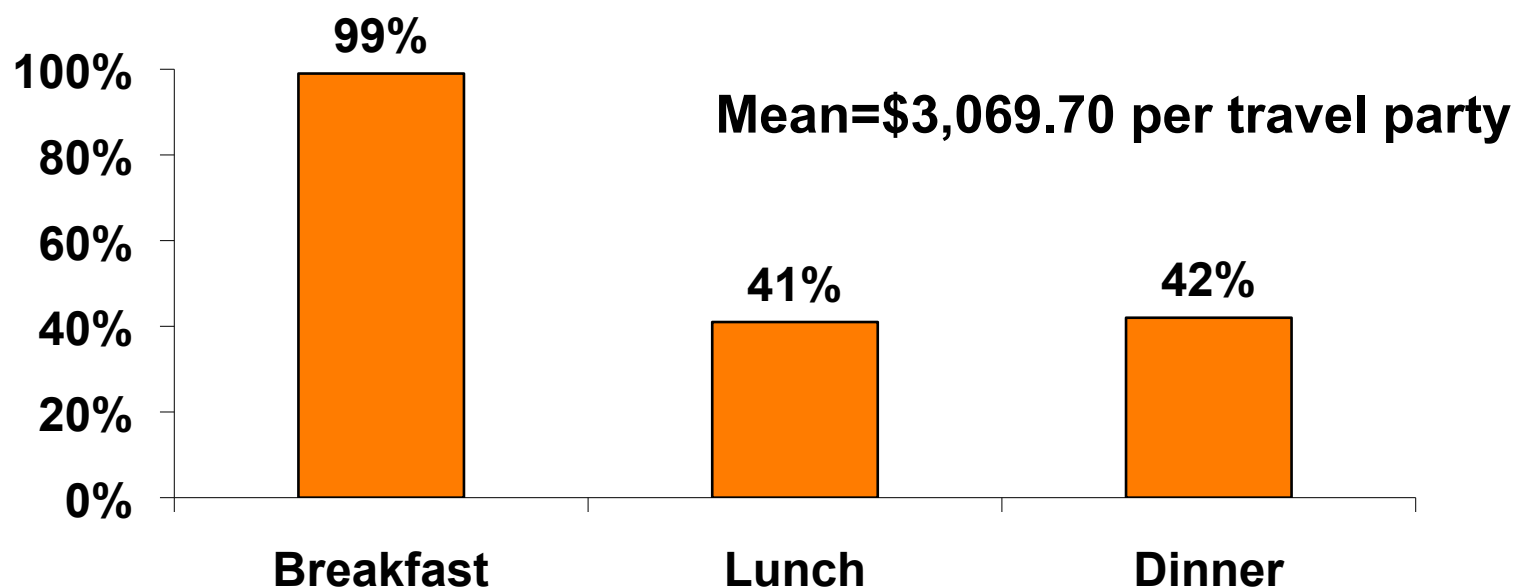
(Filter: Only those who responded)

	MEAN \$
Air & Accommodation package only	\$2,281.10
Air & Accommodation w/ daily meal package	\$3,069.70
Air only	\$977.50
Accommodation only	\$840.20
Accommodation w/ daily meal only	\$674.10
Food & Beverages in Hotel	\$-
Ground transportation - Korea	\$102.20
Ground transportation - Guam	\$100.60
Optional tours/ activities	\$300.70
Other expenses	\$474.40
Total Prepaid	\$2,347.40

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

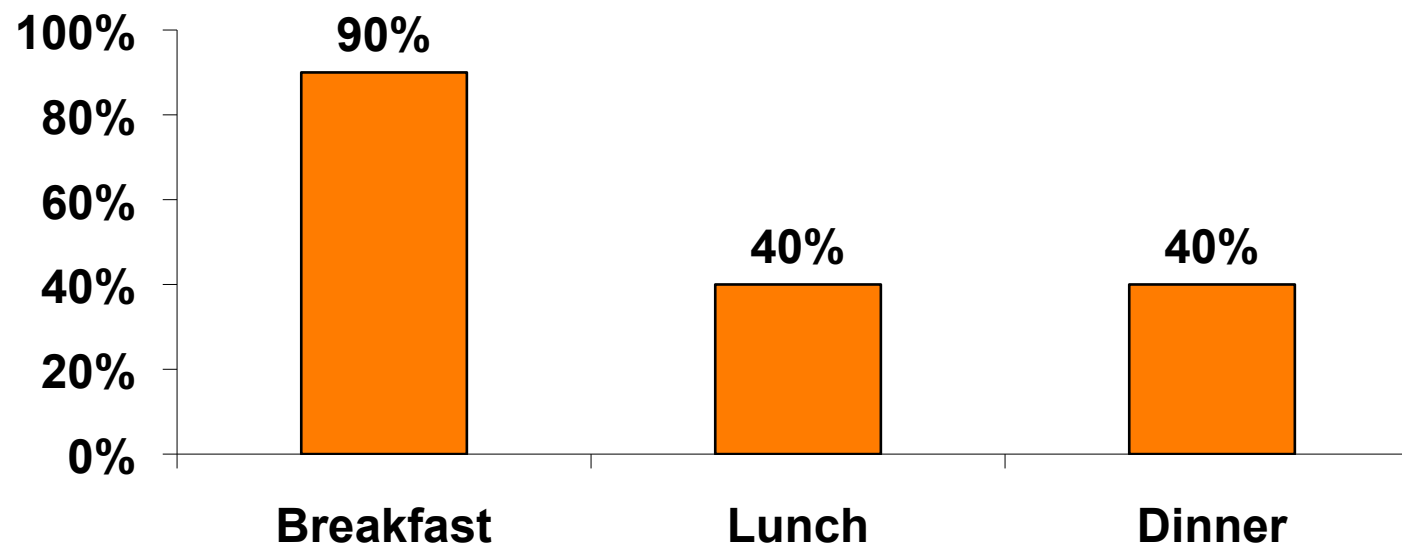
n=185



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

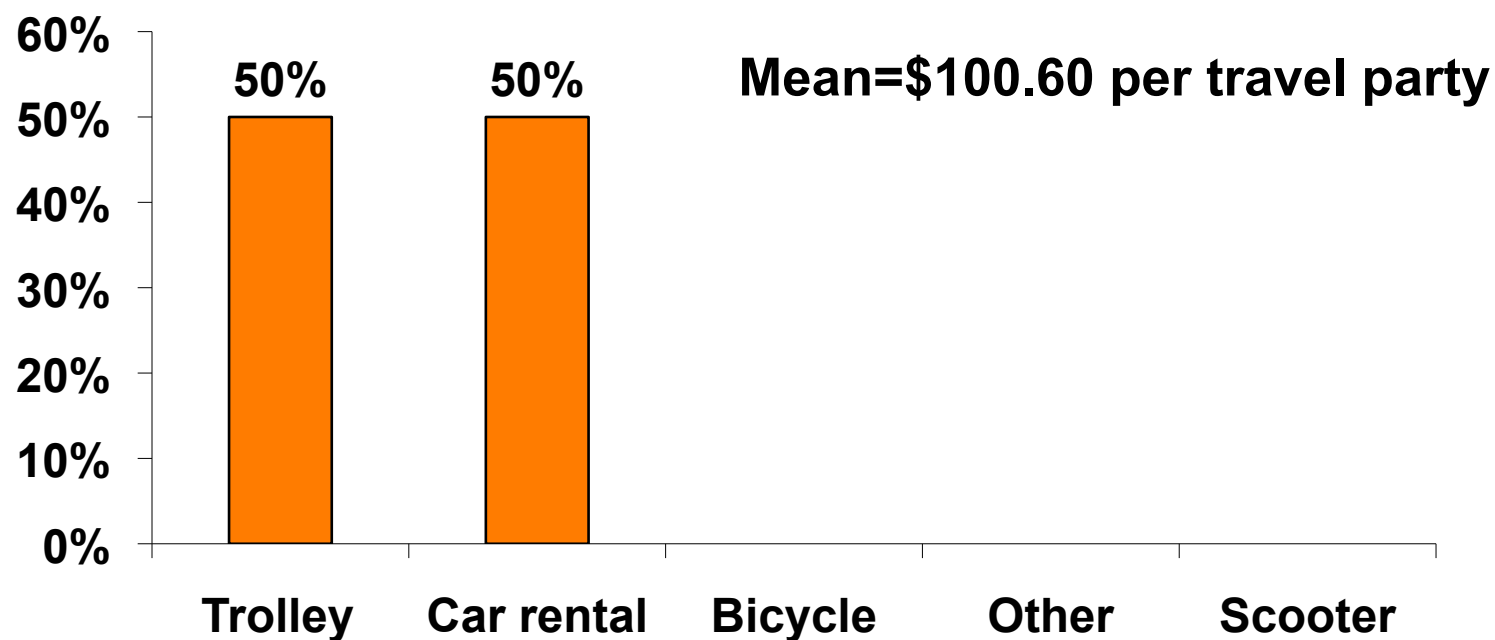
n= 10



Mean= \$674.10 per travel party

Prepaid Ground Transportation

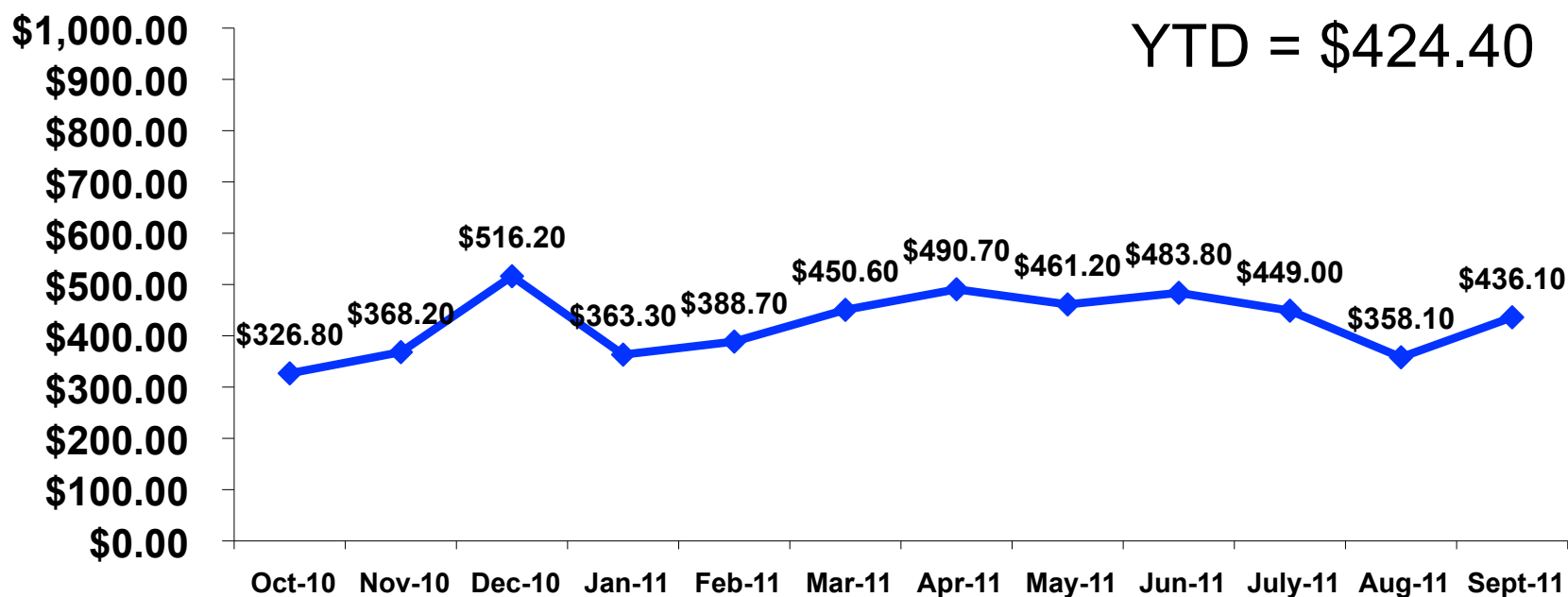
n=6



On-Island Expenditures

- \$962.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$13,000 = Maximum (highest amount recorded for the entire sample)
- \$436.10 = overall mean average per person on-island expenditure

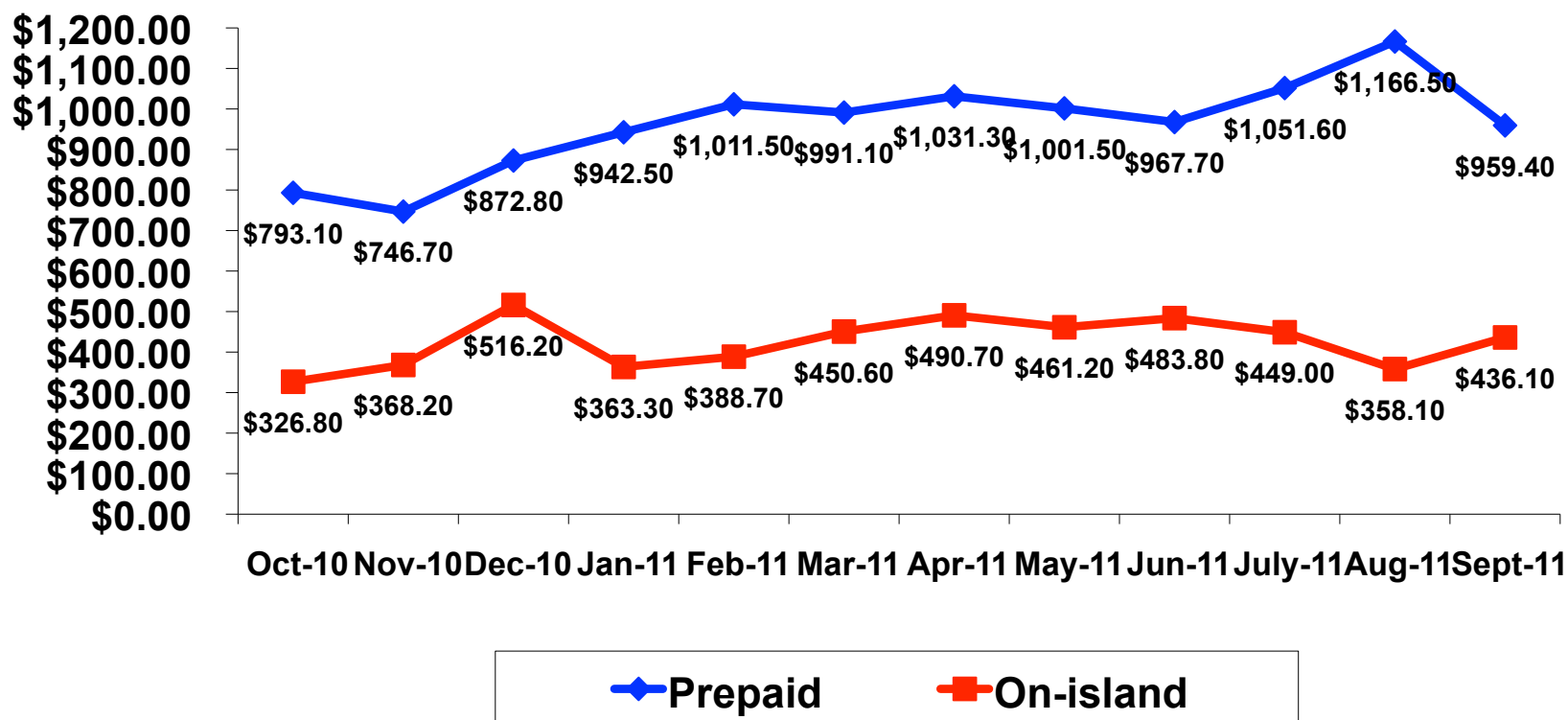
On-Island Expenditures



Prepaid/On-Island Expenditures

Prepaid YTD=\$961.40

On-Island YTD = \$424.40



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
					20-29	30-39	40-49	50+	20-29	30-39	40-49	50+
Q.11A	Mean	\$962.83	\$1,061.24	\$865.54	\$1,080.43	\$960.97	\$1,011.03	\$1,964.62	\$828.68	\$863.68	\$1,010.00	\$1,276.67
	Median	\$690	\$800	\$605	\$600	\$800	\$800	\$1,020	\$654	\$600	\$800	\$830

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
			Male	Female	20-29	30-39	40-49	50+
F&B-HOTEL	Mean	\$59.96	\$93.29	\$27.01	\$24.08	\$57.18	\$161.96	\$13.75
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-FF REST/CONV	Mean	\$30.45	\$34.23	\$26.70	\$34.65	\$33.35	\$14.13	\$16.94
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B-OUT- SIDE HOTEL/ REST	Mean	\$58.91	\$57.74	\$60.07	\$62.84	\$62.42	\$34.13	\$64.13
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OPTIONAL TOUR	Mean	\$91.70	\$99.23	\$84.27	\$78.83	\$85.18	\$151.63	\$75.31
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV-SELF	Mean	\$201.73	\$212.43	\$191.21	\$177.85	\$216.53	\$146.65	\$320.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT/ SOUV- F&F AT HOME	Mean	\$116.72	\$120.87	\$112.63	\$140.52	\$114.96	\$78.83	\$107.19
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LOCAL TRANS	Mean	\$32.92	\$33.09	\$32.76	\$34.82	\$34.97	\$9.26	\$64.81
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$7
OTHER EXP	Mean	\$366.25	\$406.64	\$326.31	\$329.75	\$307.08	\$414.20	\$1,166.19
	Median	\$40	\$50	\$30	\$30	\$40	\$70	\$60
TOTAL ON ISLAND	Mean	\$962.83	\$1,061.24	\$865.54	\$889.63	\$915.57	\$1,010.78	\$1,835.63
	Median	\$690	\$800	\$605	\$620	\$700	\$800	\$925

On-Island Expenditures

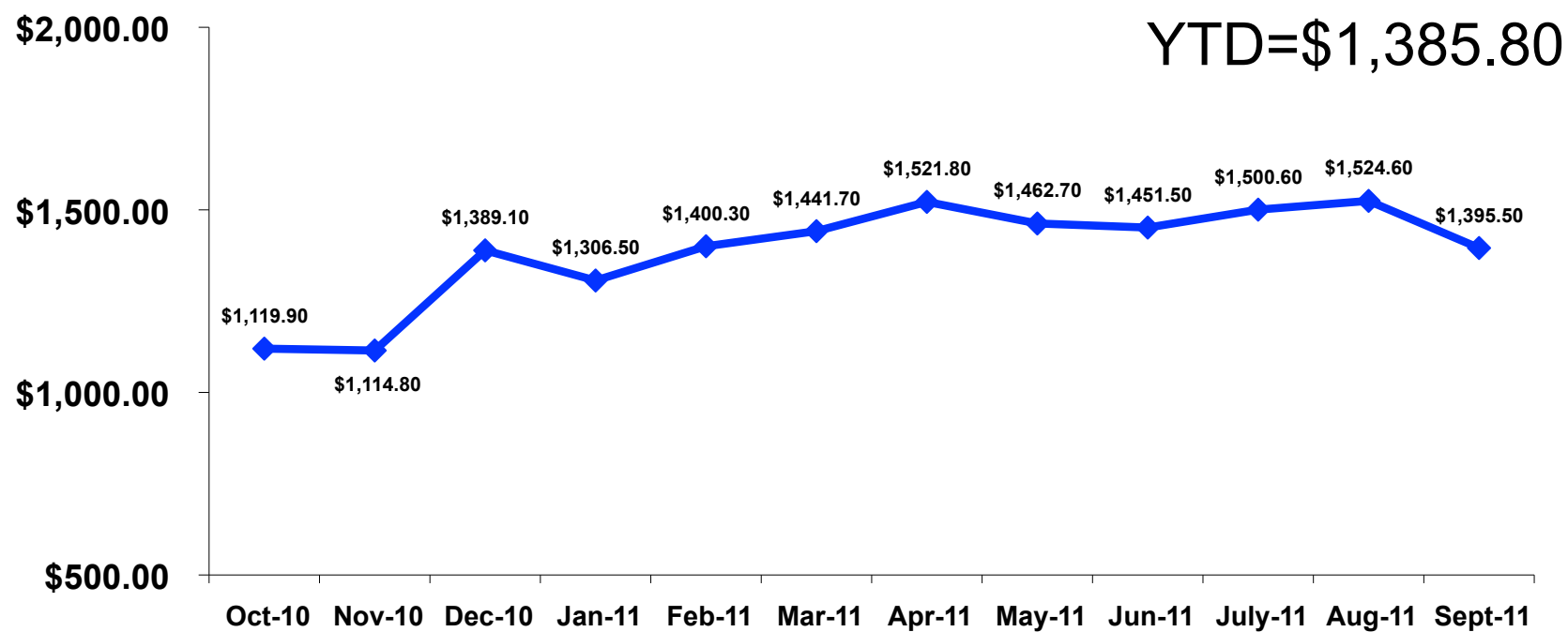
First Timers & Repeaters

		TRIPS TO GUAM	
		1st	Repeat
F&B-HOTEL	Mean	\$54.50	\$90.81
	Median	\$0	\$0
F&B-FF	Mean	\$29.10	\$38.02
REST/CONV	Median	\$0	\$0
F&B-OUT- SIDE	Mean	\$55.24	\$79.62
HOTEL/ REST	Median	\$0	\$0
OPTIONAL	Mean	\$93.56	\$81.23
TOUR	Median	\$0	\$0
GIFT/	Mean	\$196.97	\$228.49
SOUV-SELF	Median	\$0	\$10
GIFT/ SOUV-	Mean	\$120.92	\$93.08
F&F AT HOME	Median	\$0	\$0
LOCAL TRANS	Mean	\$28.12	\$59.89
	Median	\$0	\$10
OTHER EXP	Mean	\$338.75	\$521.38
	Median	\$40	\$40
TOTAL ON	Mean	\$919.61	\$1,206.64
ISLAND	Median	\$677	\$800

Total Expenditures Per Person (Prepaid & On-Island)

- \$1,395.50 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,867 = Maximum (highest amount recorded for the entire sample)

Total Expenditures

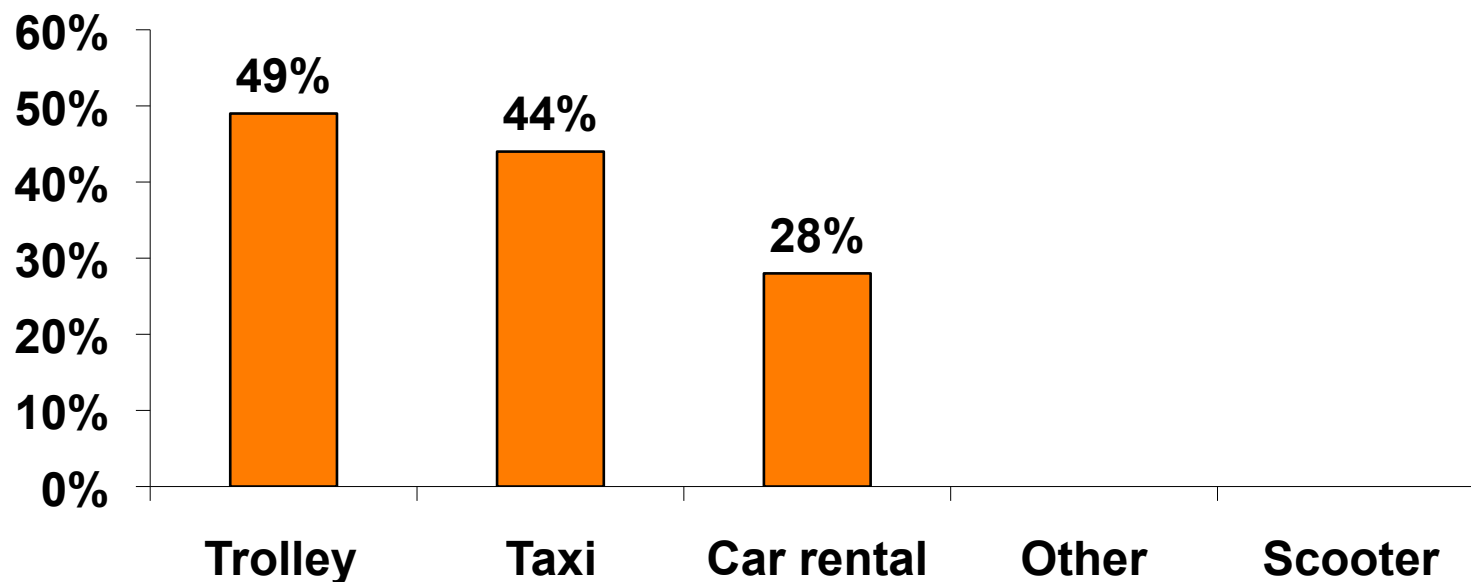


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$60.00
Food & beverage in fast food restaurant/ convenience store	\$30.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$58.90
Optional tours and activities	\$91.70
Gifts/ souvenirs for yourself/companions	\$201.70
Gifts/ souvenirs for friends/family at home	\$116.70
Local transportation	\$32.90
Other expenses not covered	\$366.20
Average Total	\$962.80

Local Transportation

n=144



Mean=\$32.90 per travel party

Guam Airport Expenditures

- \$50.40 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,100 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

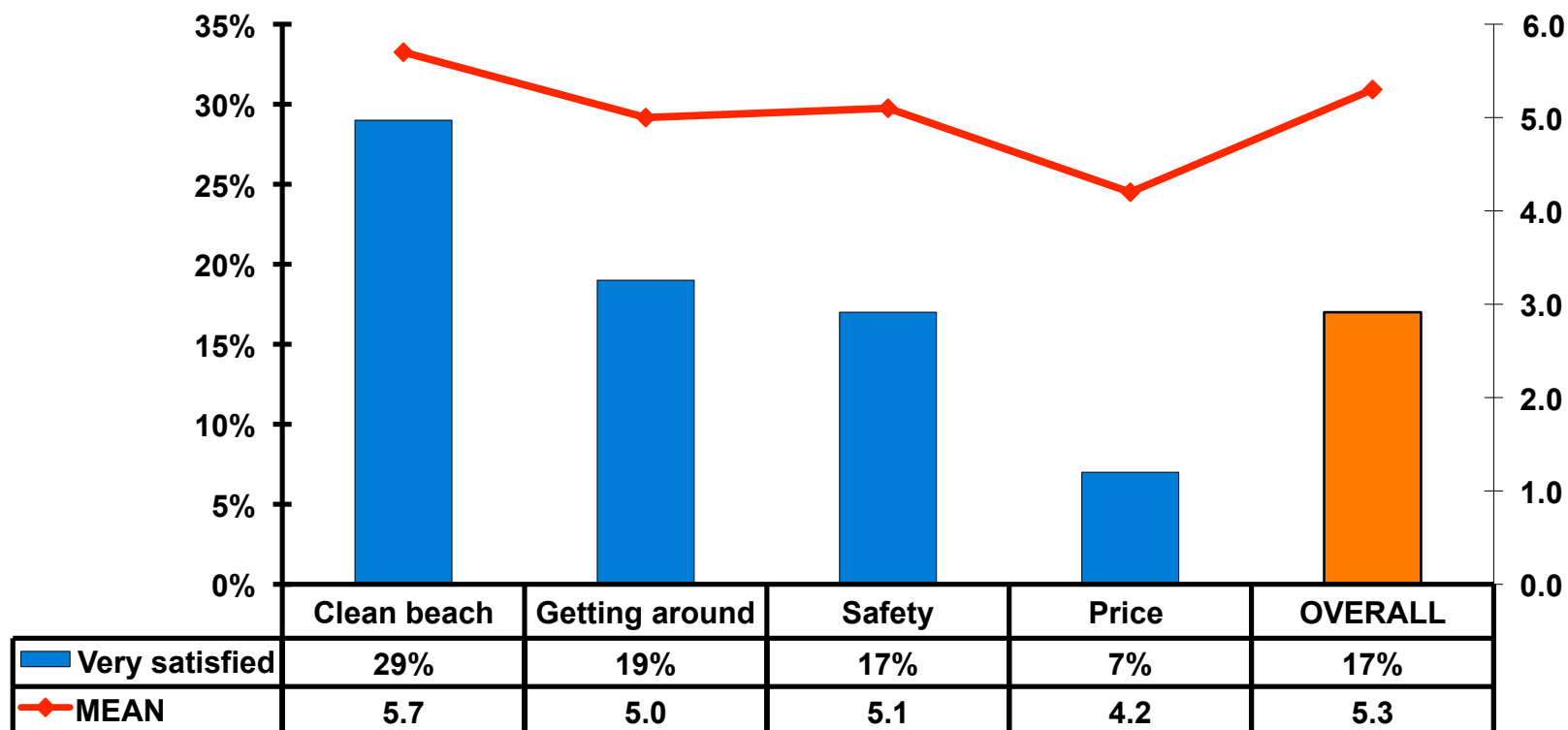
	MEAN \$
Food & Beverages	\$5.10
Gifts/Souvenirs Self	\$23.90
Gifts/Souvenirs Others	\$21.30
Total	\$50.40

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

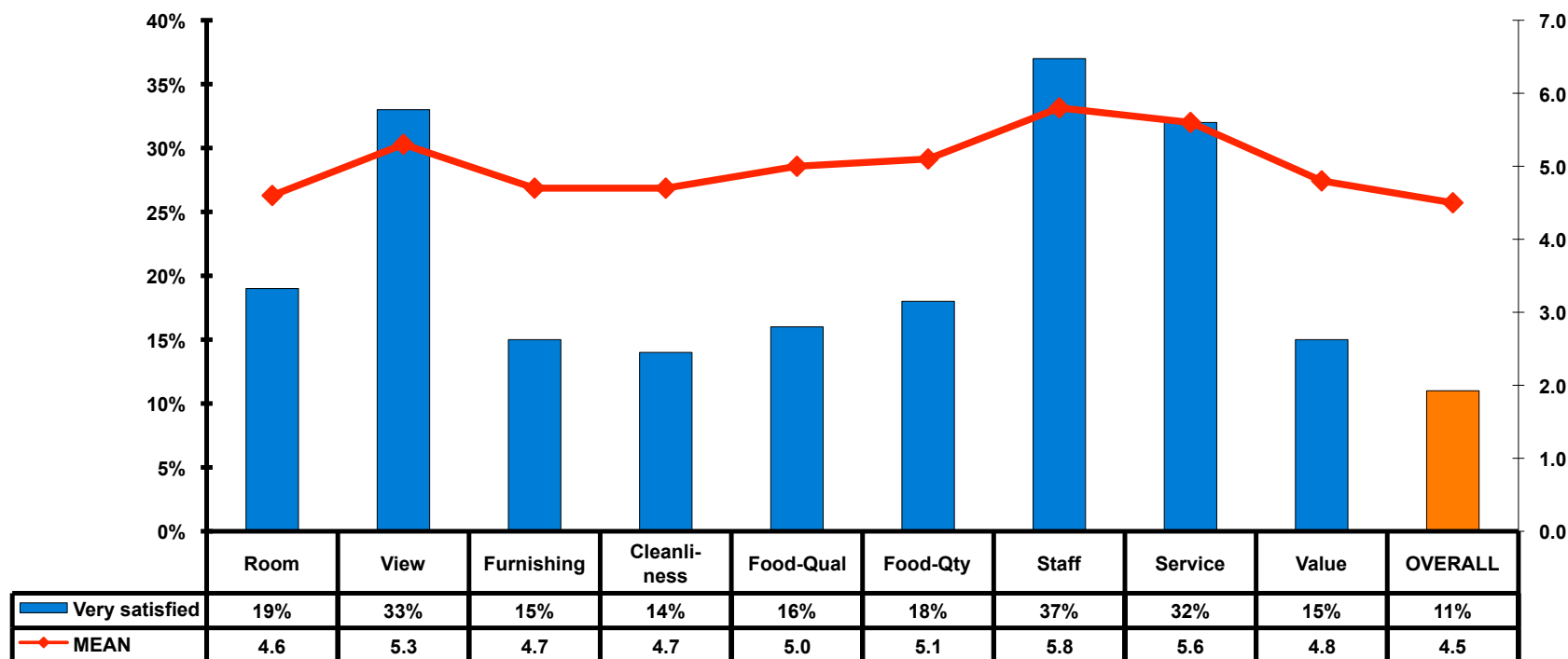
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

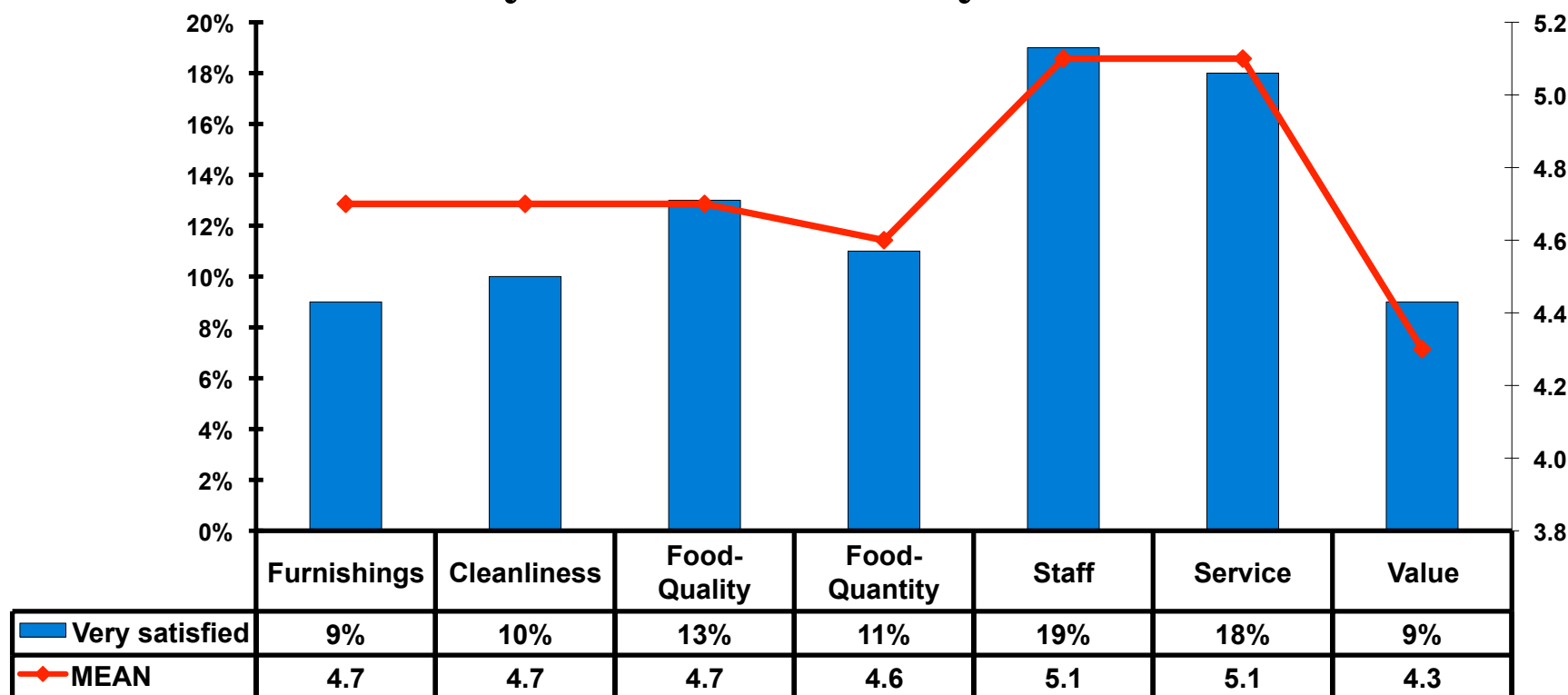
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

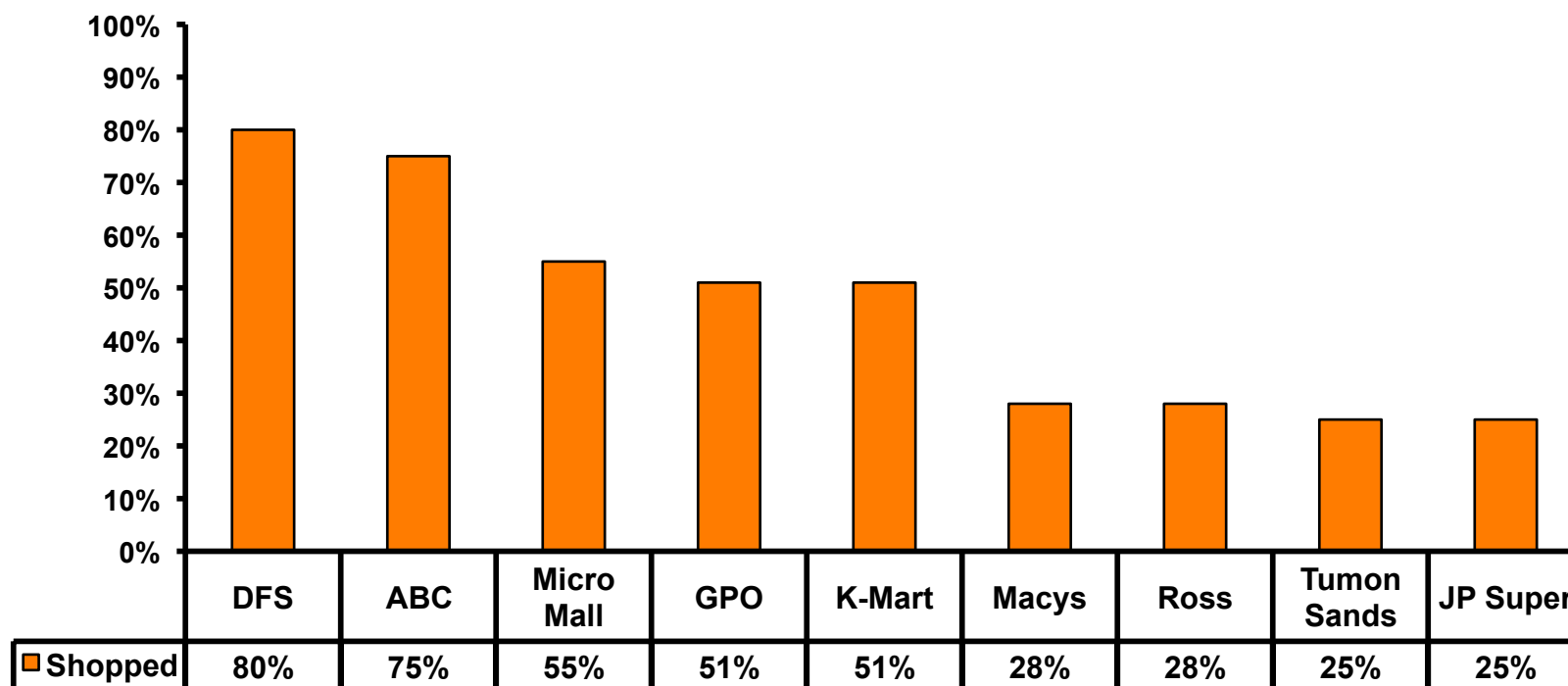
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

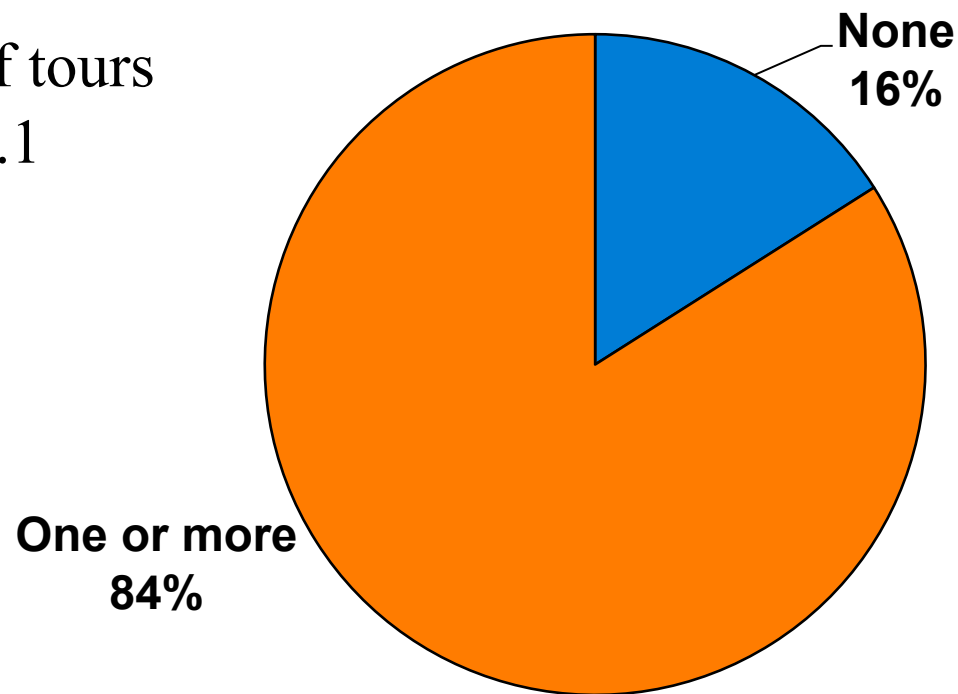
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 44%	Score of 6 to 7 = 38%
Score of 4 to 5 = 43%	Score of 4 to 5 = 45%
Score 1 to 3 = 14%	Score 1 to 3 = 16%
MEAN = 5.0	MEAN = 4.8

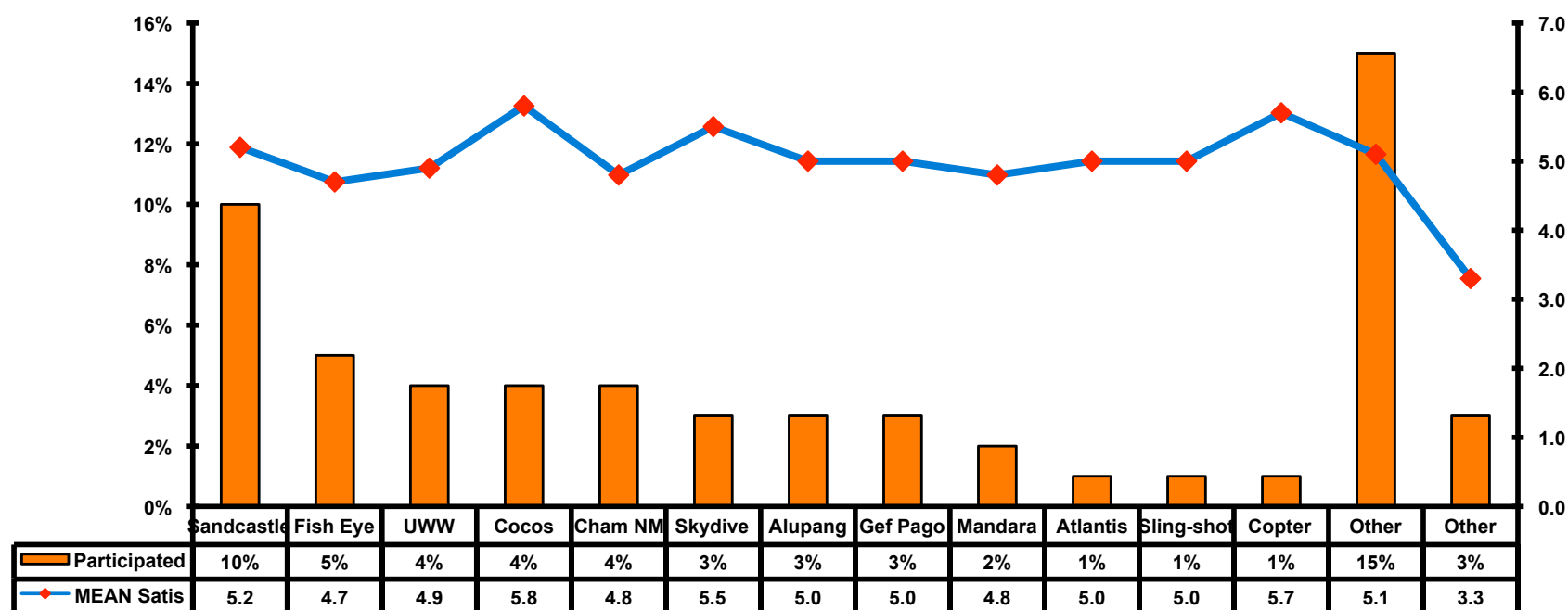
Optional Tour Participation

- Average number of tours participated in is 2.1



Optional Tours

Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 35%	Score of 6 to 7 = 28%
Score of 4 to 5 = 53%	Score of 4 to 5 = 54%
Score 1 to 3 = 10%	Score 1 to 3 = 18%
MEAN = 4.9	MEAN = 4.5

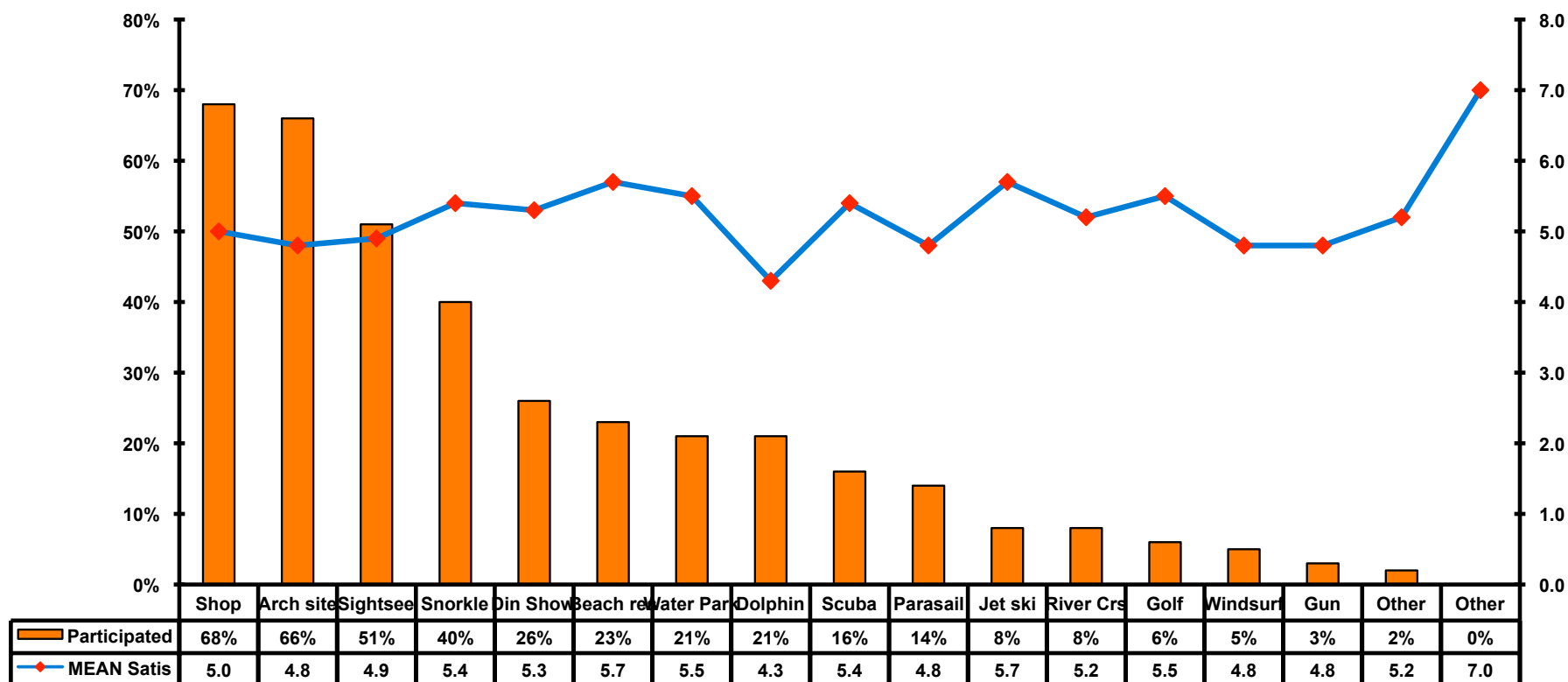
Night Tours Satisfaction

7pt Rating Scale

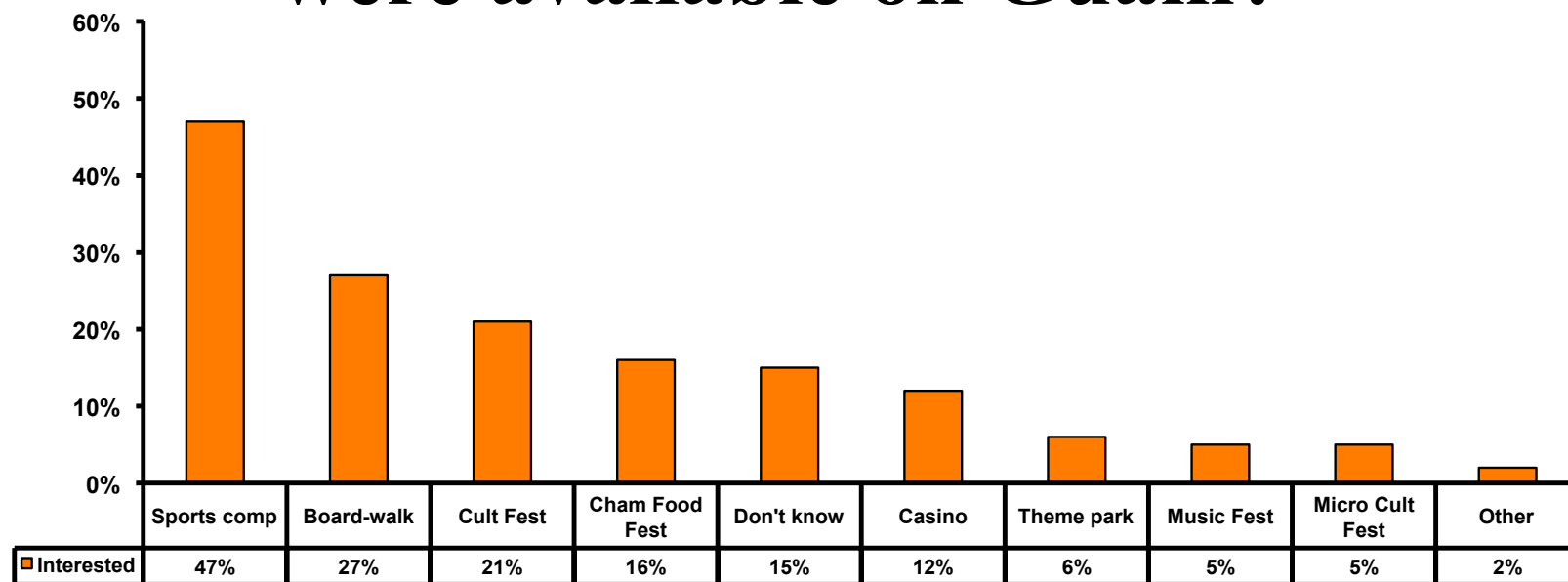
7=Very Satisfied/ 1=Very Dissatisfied

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 = 60%	Score of 4 to 5 = 54%
Score 1 to 3 = 19%	Score 1 to 3 = 27%
MEAN = 4.3	MEAN = 4.1

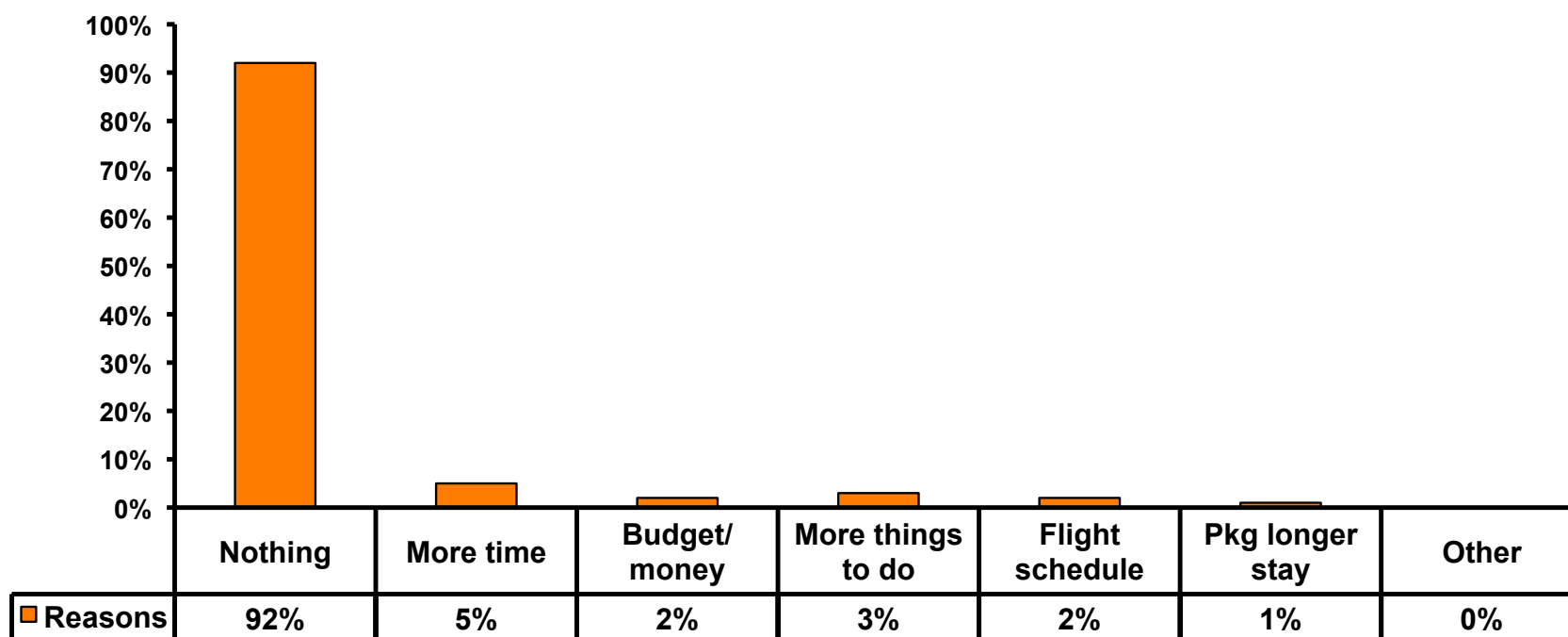
Satisfaction with Other Activities



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



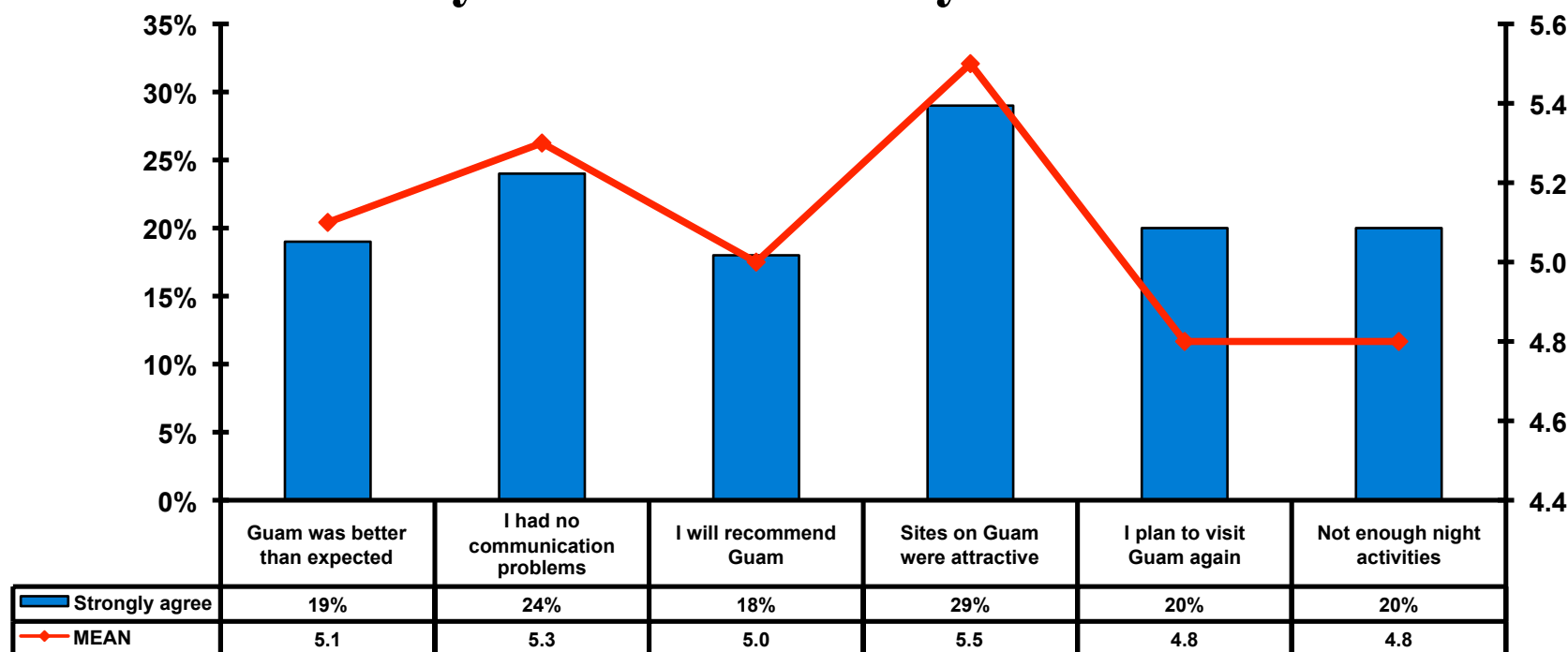
What would it take to make you want to stay an extra day on Guam?



On-Island Perceptions

7pt Rating Scale

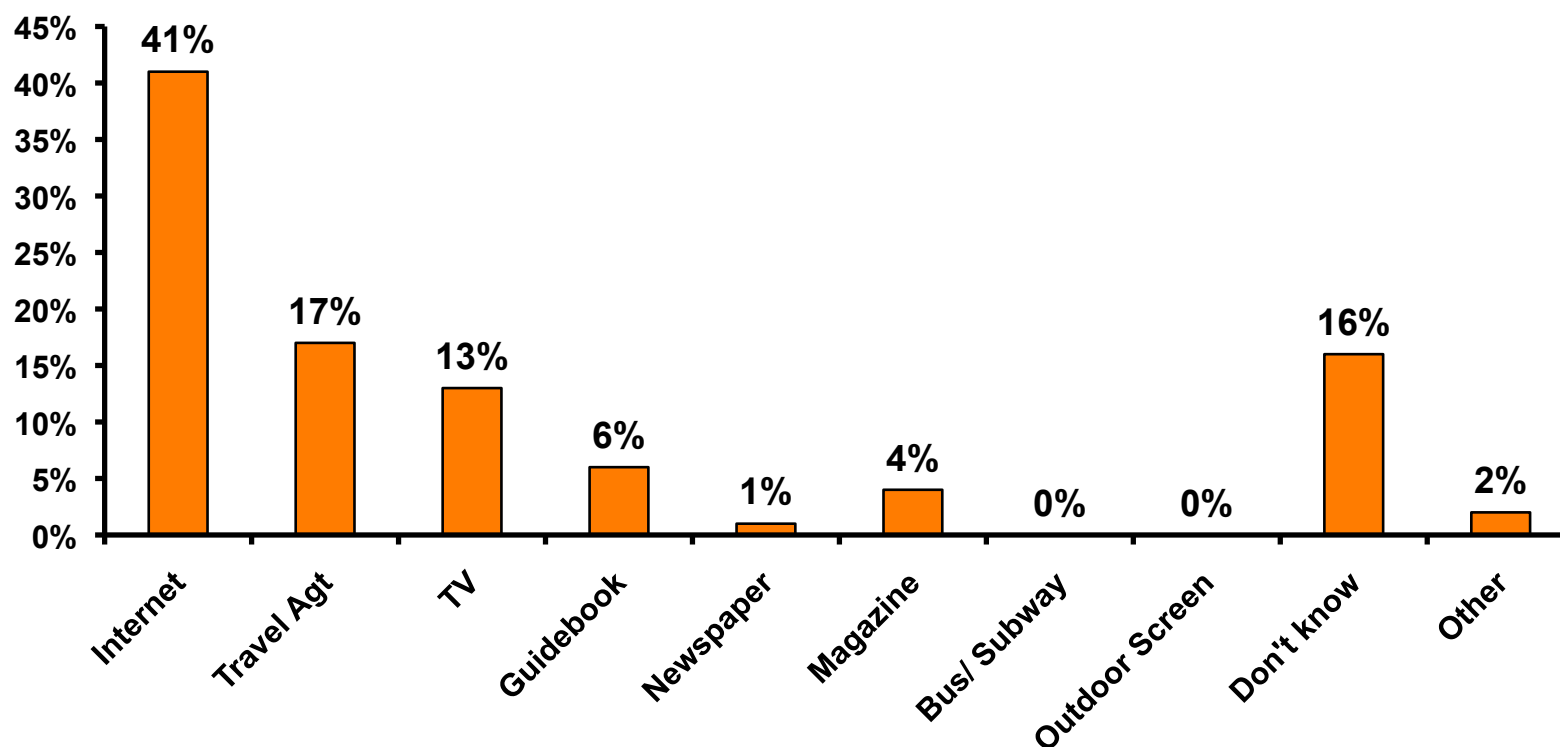
7=Very Satisfied/ 1=Very Dissatisfied



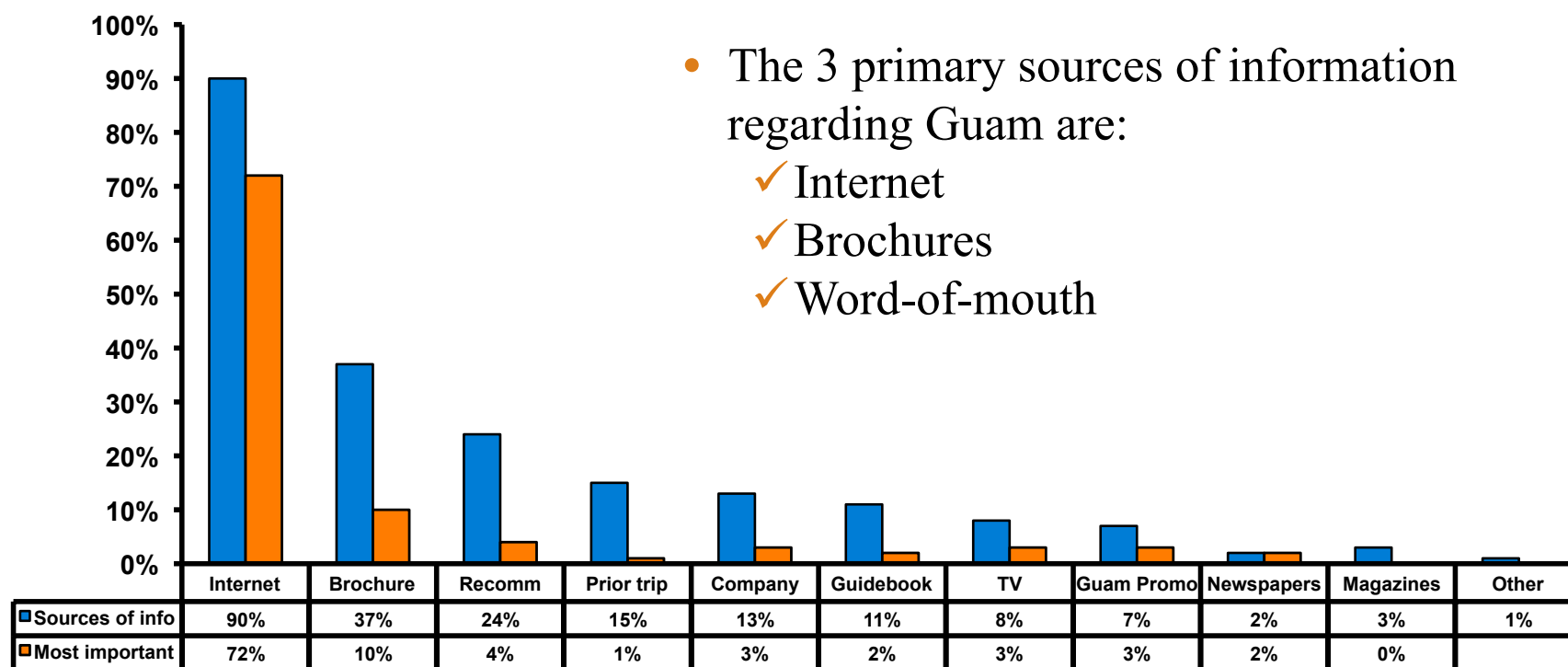
SECTION 5 **PROMOTIONS**

Guam Promotion - Media

Past 90 days

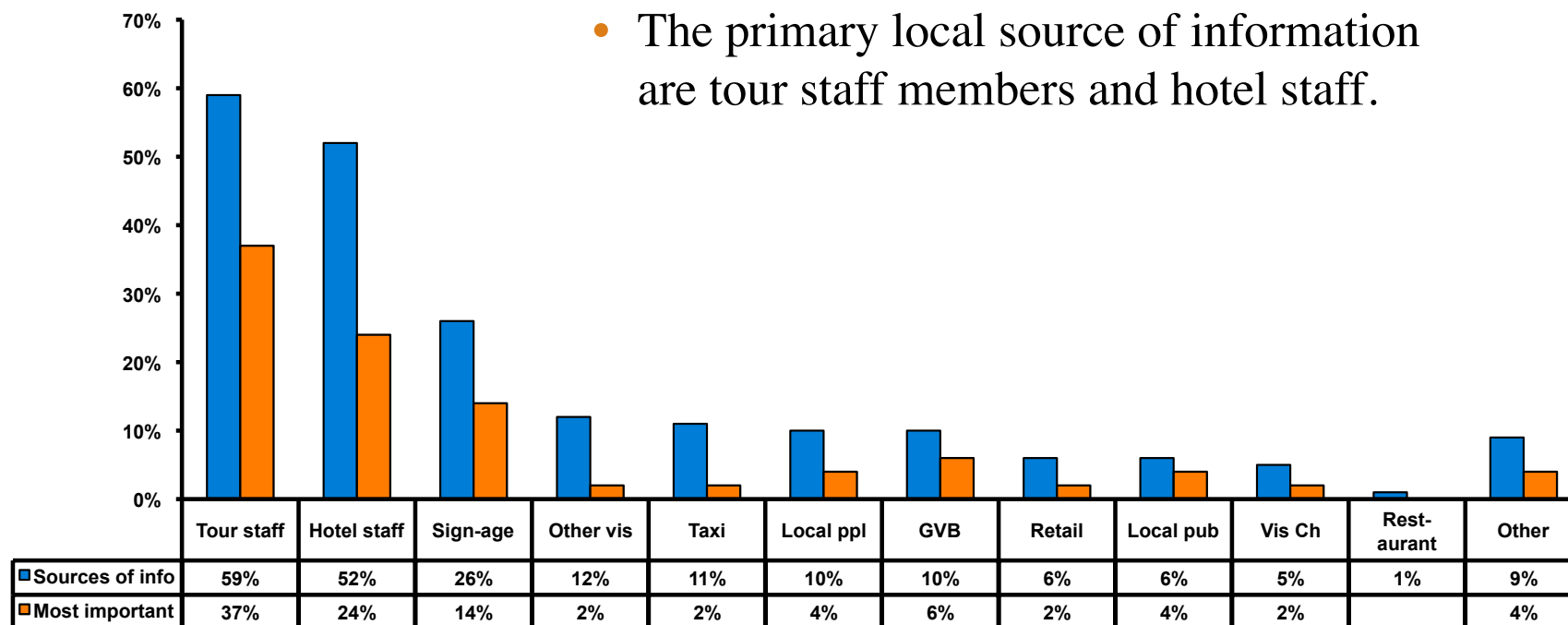


Sources of Information Pre-arrival



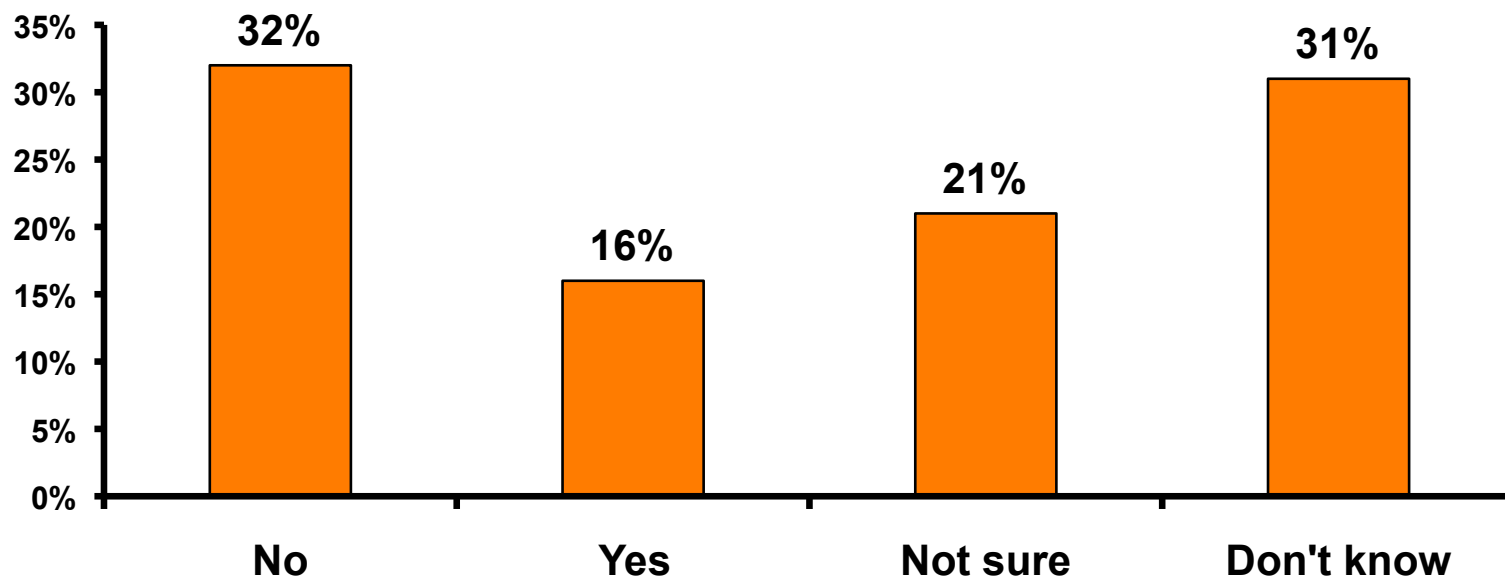
Sources of Information Post-arrival

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



SECTION 6 **OTHER ISSUES**

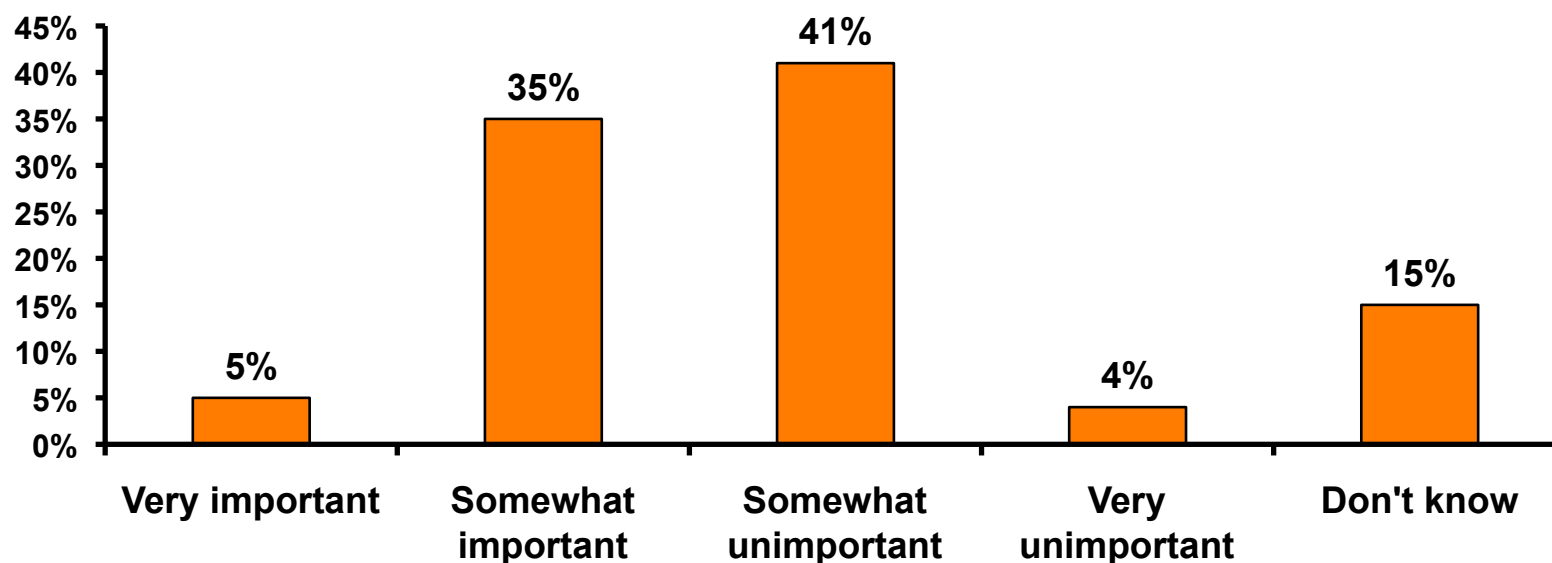
Good time to spend money on travel outside of Korea - Overall



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	22%	33%	43%	44%	13%	29%	35%	35%	33%
	Yes	17%	18%	9%	6%	21%	15%	13%	19%	33%
	Not sure	26%	17%	17%	38%	25%	18%	22%	21%	33%
	Do not know	35%	31%	30%	13%	42%	38%	29%	25%	
Total	Count	95	195	46	16	24	112	89	96	6

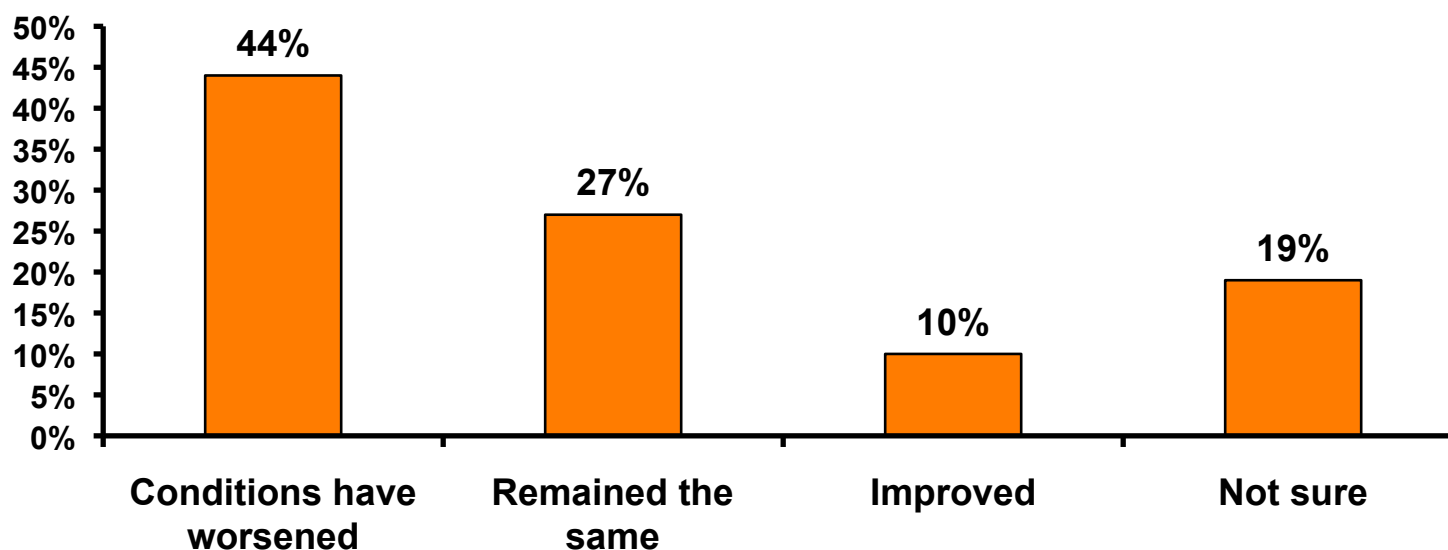
The importance of the state of the Korean economy in decision to travel outside of Korea - Overall



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	7%	3%		6%	4%	4%	4%	4%	
	Somewhat unimportant	34%	46%	41%	31%	29%	40%	43%	49%	33%
	Somewhat important	33%	32%	48%	50%	38%	36%	40%	26%	50%
	Very important	8%	2%	7%	13%	8%	3%	2%	8%	17%
	Don't know	18%	17%	4%		21%	18%	10%	13%	
Total	Count	95	195	46	16	24	112	89	96	6

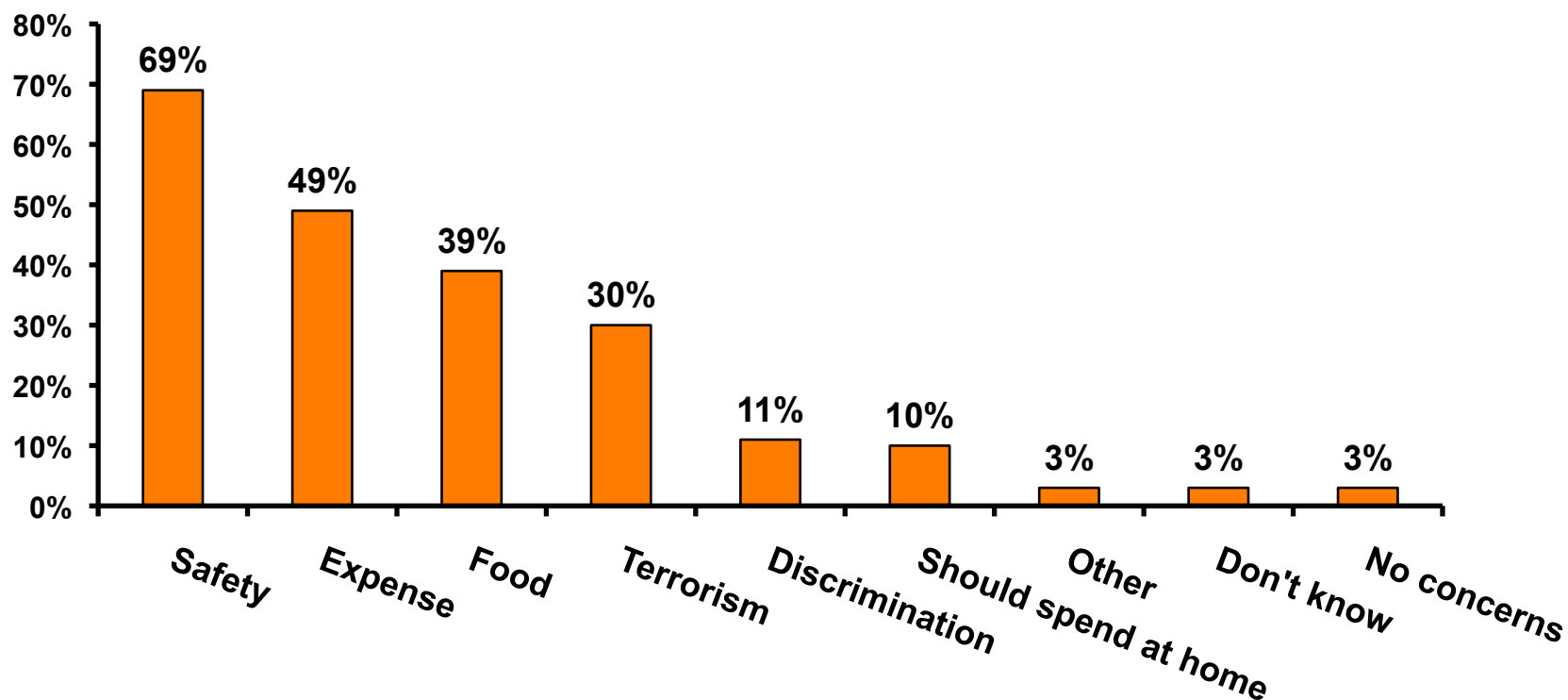
Rating Korean Economy Compared to 12 months ago



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	44%	41%	54%	50%	42%	38%	53%	46%	83%
	Conditions have remained the same	22%	31%	24%	19%	21%	29%	24%	32%	17%
	Conditions have improved	6%	10%	11%	25%	4%	11%	8%	11%	
	Do not know	27%	18%	11%	6%	33%	23%	16%	10%	
Total	Count	95	194	46	16	24	111	89	96	6

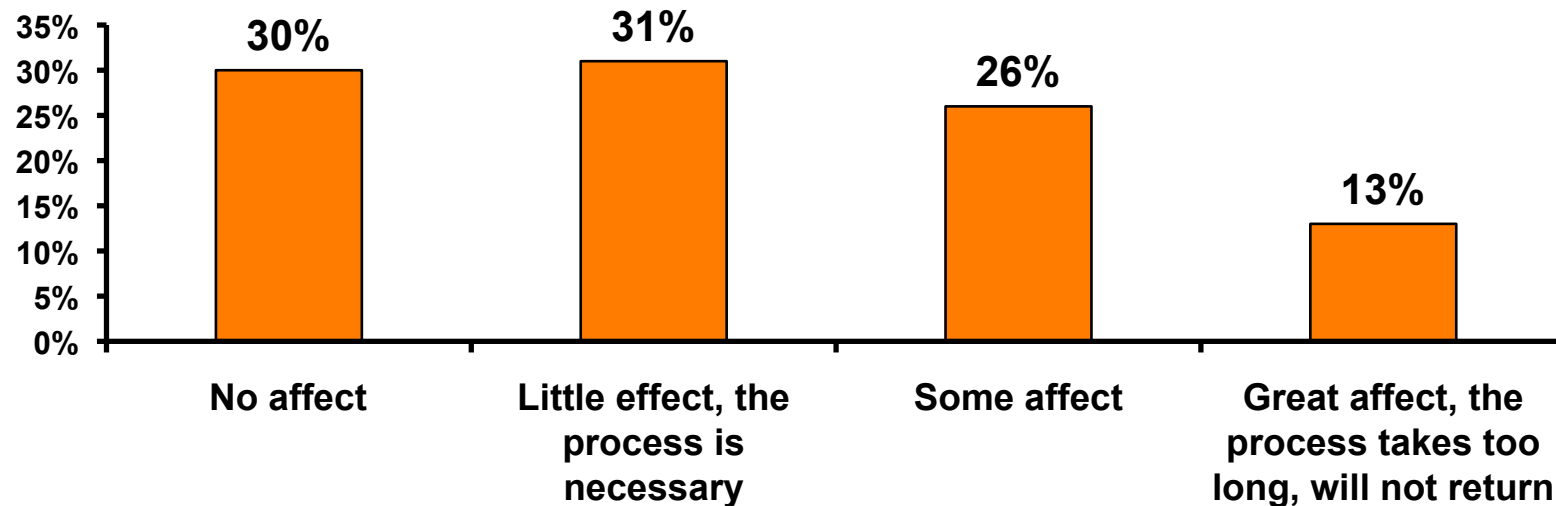
Concerns about travel outside of Korea - Overall



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	59%	72%	78%	81%	70%	66%	73%	70%	67%
	Expense	50%	51%	43%	38%	52%	54%	57%	42%	50%
	Food	35%	44%	33%	25%	30%	40%	35%	42%	50%
	Terrorism	27%	34%	22%	31%	22%	25%	29%	41%	50%
	Spending money abroad when it should be spent at home	15%	9%	7%	6%		12%	16%	4%	33%
	Other	5%	3%		6%	17%	4%	3%		
	No concerns	3%	2%	4%		4%	1%	2%	5%	
	Do not know	3%	2%	4%			3%		3%	17%
Total	Cases	94	195	46	16	23	112	89	96	6

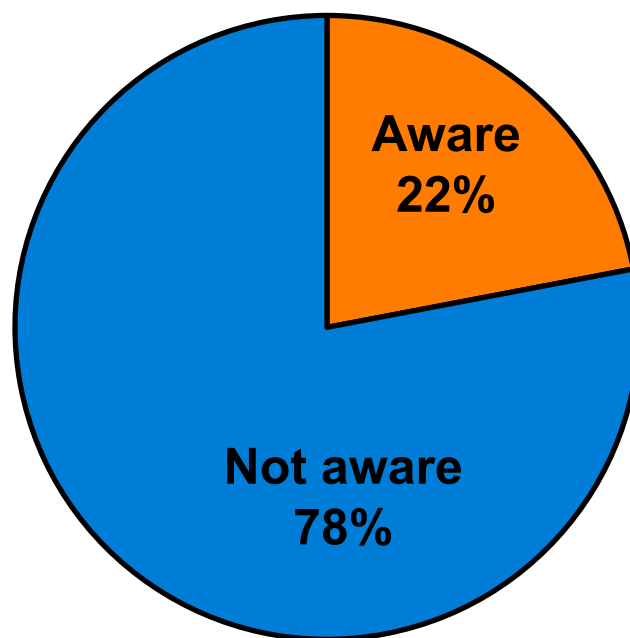
Security Screening/ Immigration Process at Guam International Airport



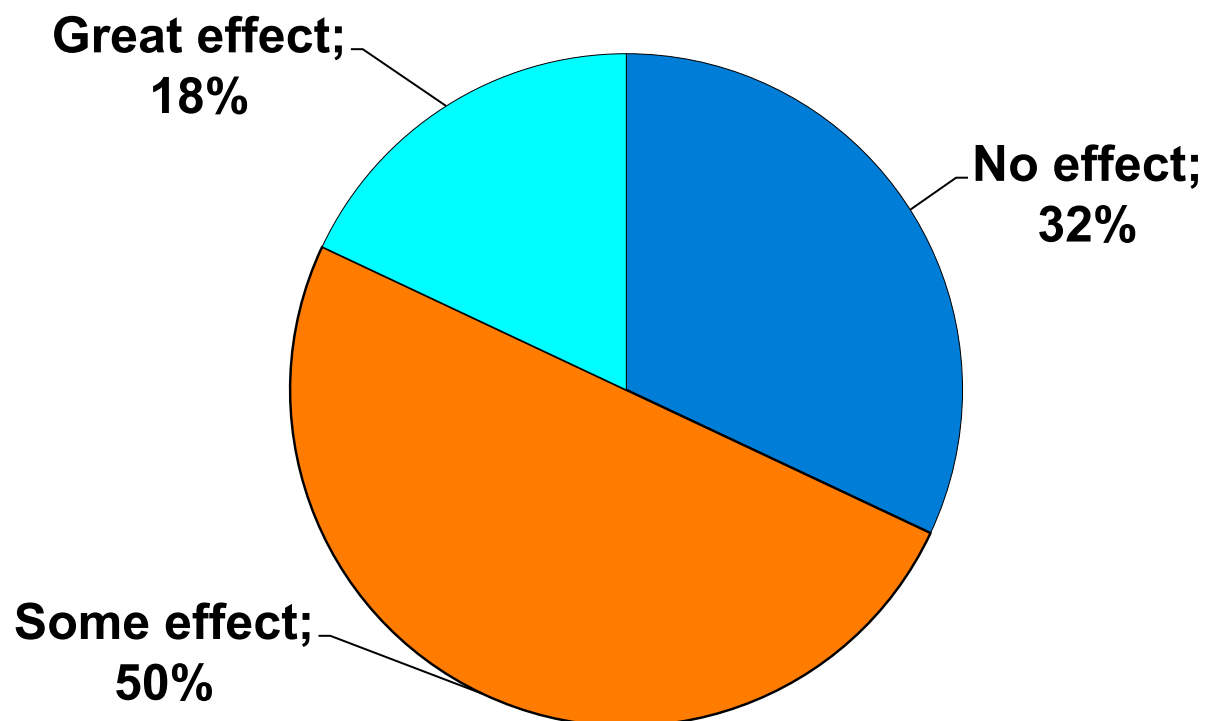
Hotel Room Surcharge by \$3.00/ Per day/ Per room to help build Guam Museum

- Mean Rating – **2.9** out of possible 7.0
- Agree (Score 6-7) – **6%**
- Neutral (Score 4-5) – **38%**
- Disagree (Score 1-3) – **54%**

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



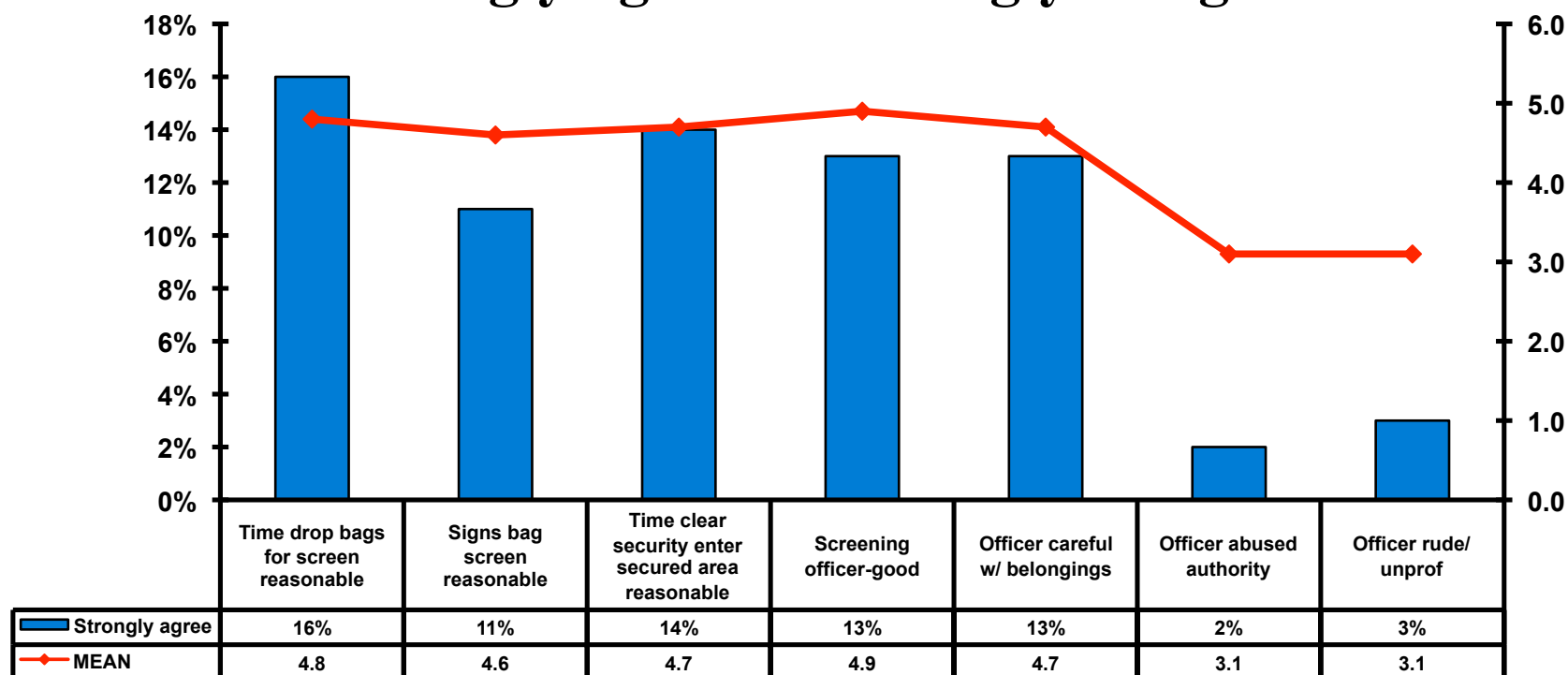
Effects of U.S. Military troop movement on future trips to Guam



Airport Screening

7pt Rating Scale

7=Strongly agree/ 1=Strongly disagree



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

