



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2010 MARKET SEGMENTATION –

APRIL 2010



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 **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 +/- 5.22 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 +/- 5.22 percentage points.

OBJECTIVES

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Divers
 - Families
 - Golfers
 - Group Travelers
 - OL's/ salary women
 - Seniors
 - Shoppers
 - Repeat Visitors
 - Students
 - Visitors coming to Guam for a wedding
 - Honeymooners
 - To identify (for all Korean visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments

Parameters

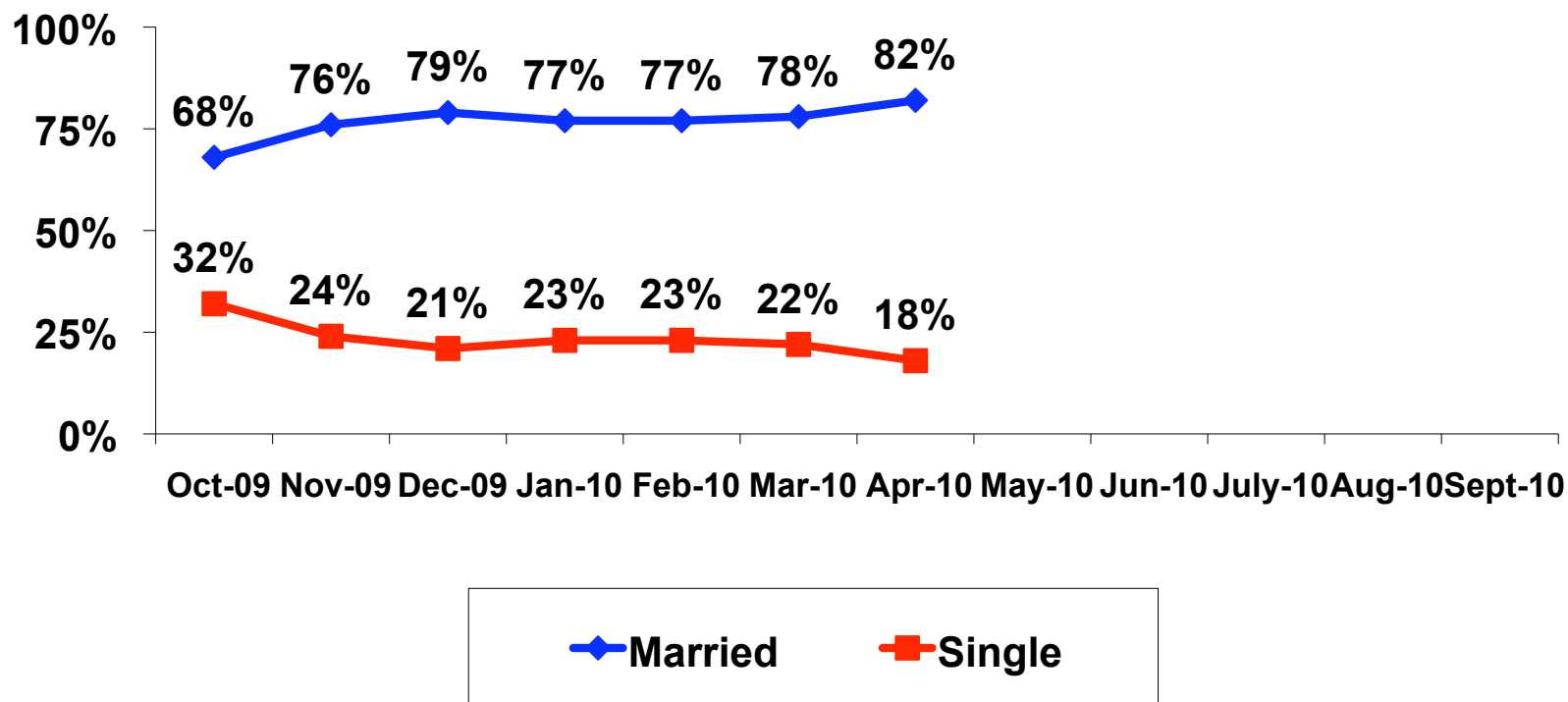
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	Jul 10	Aug 10	Sept 10
Families	28%	29%	30%	53%	50%	34%	37%					
Repeaters	25%	21%	19%	21%	25%	17%	16%					
Shoppers	51%	60%	57%	52%	49%	54%	61%					
Seniors	3%	5%	5%	4%	5%	5%	3%					
OL/Salary woman	11%	15%	13%	8%	9%	11%	11%					
Group Travelers	5%	3%	6%	3%	1%	3%	3%					
Students	3%	2%	1%	1%	1%	2%	1%					
Golfers	7%	5%	4%	7%	7%	6%	7%					
Wedding	1%	1%	1%	1%	1%	3%	2%					
Divers	20%	20%	22%	19%	16%	17%	20%					
Honey- mooners	17%	21%	23%	12%	14%	23%	24%					
TOTAL	352	352	353	351	352	352	353					5

SECTION 1 **PROFILE OF RESPONDENTS**

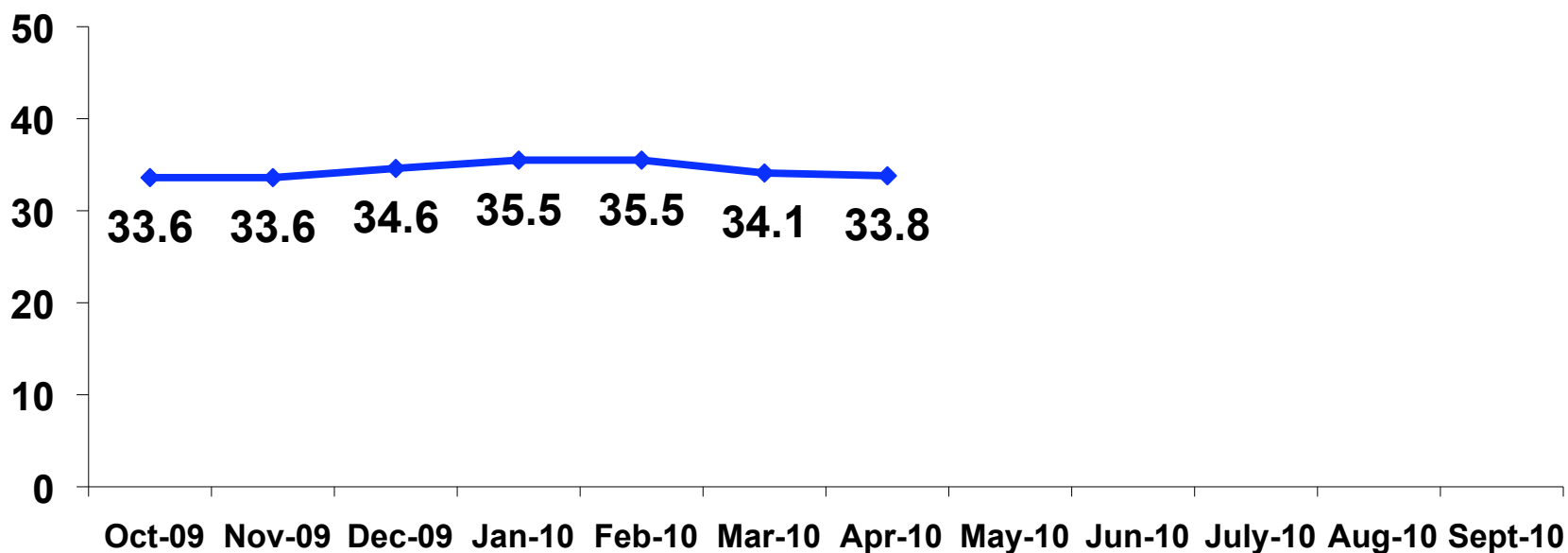
MARITAL STATUS - TRACKING



MARITAL STATUS - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	290	120	46	177	29	4	2	17	6	81	58	12
		Col %	82%	90%	79%	82%	78%	44%	40%	71%	100%	98%	84%	100%
	Single	Count	63	13	12	39	8	5	3	7		2	11	
		Col %	18%	10%	21%	18%	22%	56%	60%	29%		2%	16%	
Total	Count		353	133	58	216	37	9	5	24	6	83	69	12

AVERAGE AGE - TRACKING



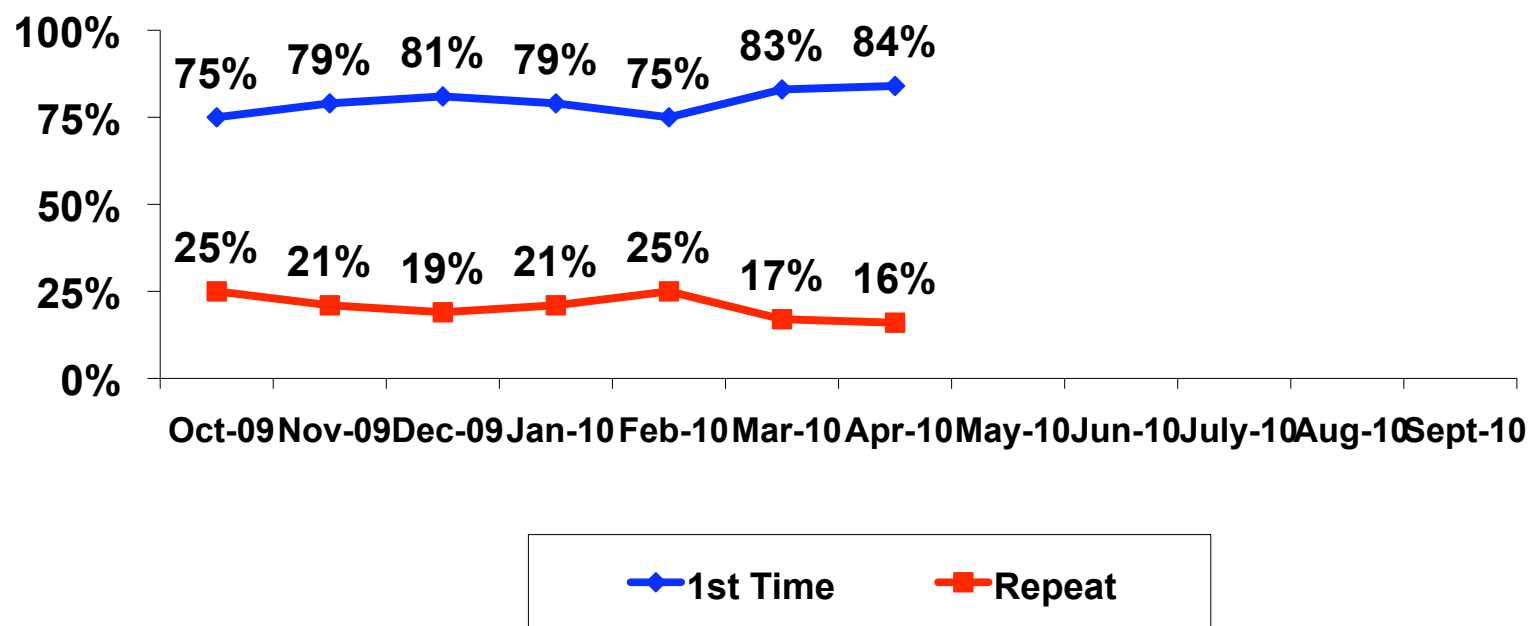
AGE - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	209	49	22	140	31	6	5	15	4	76	57	
		Col %	59%	37%	38%	65%	84%	67%	100%	63%	67%	92%	83%	
	35-54	Count	139	84	36	73	6	3		7	2	7	11	7
		Col %	39%	63%	62%	34%	16%	33%		29%	33%	8%	16%	58%
	55+	Count	5			3				2			1	5
		Col %	1%			1%				8%			1%	42%
Total	Count		353	133	58	216	37	9	5	24	6	83	69	12
C	Mean		33.8	35.8	37.3	33.2	31.2	32.9	25.4	35.8	32.8	29.3	30.9	53.3
	Median		33	36	38	32	30	32	23	33	29	29	30	51

INCOME - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count 4	1	3	2						1		
		Col % 1%	1%	6%	1%						1%		
	KW12M-KW24M	Count 33	5	1	25	7			3	3	13	14	1
		Col % 10%	4%	2%	12%	19%			13%	50%	17%	21%	9%
	KW24M-KW36M	Count 61	9	6	41	11	4		1	1	31	14	
		Col % 18%	7%	11%	20%	30%	44%		4%	17%	41%	21%	
	KW36M-KW48M	Count 54	17	9	37	7	1	1	8		9	12	1
		Col % 16%	14%	17%	18%	19%	11%	33%	35%		12%	18%	9%
	KW48M-KW60M	Count 52	26	9	27	2	1		3	1	9	8	2
		Col % 16%	21%	17%	13%	5%	11%		13%	17%	12%	12%	18%
	KW60M-KW72M	Count 45	24	11	27	3	2		2	1	3	9	4
		Col % 14%	19%	20%	13%	8%	22%		9%	17%	4%	14%	36%
	KW72M+	Count 67	38	14	37	7	1		5		4	5	3
		Col % 20%	31%	26%	18%	19%	11%		22%		5%	8%	27%
	No Income	Count 14	4	1	9			2	1		5	4	
		Col % 4%	3%	2%	4%			67%	4%		7%	6%	
Total	Count	330	124	54	205	37	9	3	23	6	75	66	11

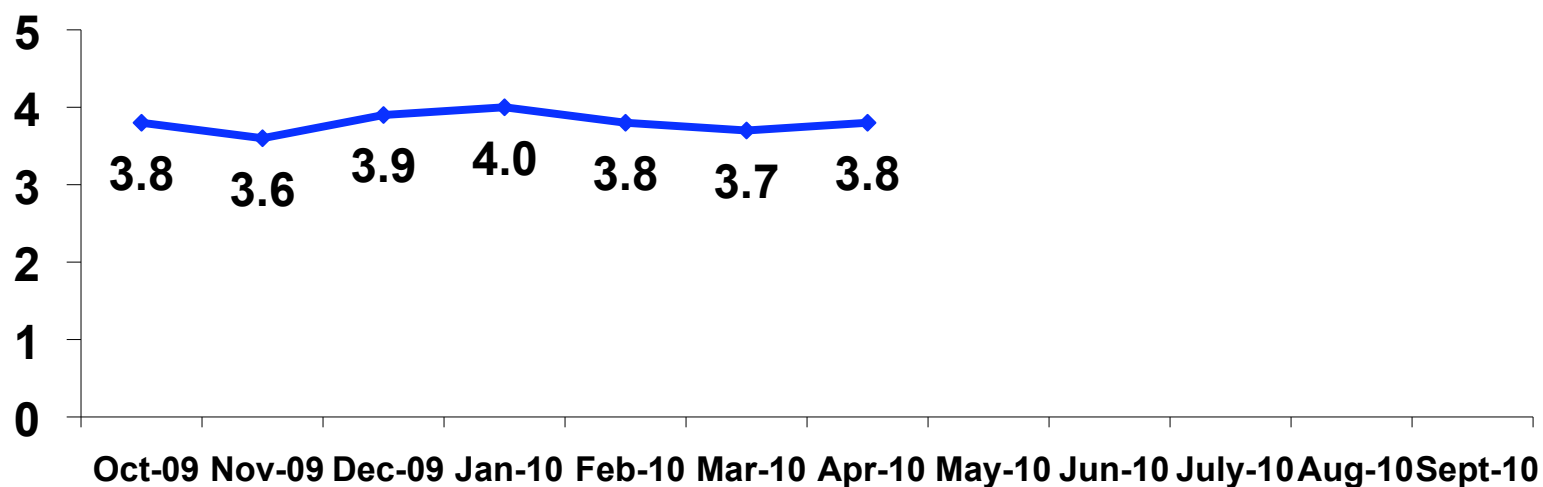
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	295	107		186	30	7	5	19	6	83	64	9
		Col %	84%	80%		86%	81%	78%	100%	79%	100%	100%	93%	75%
	No	Count	58	26	58	30	7	2		5			5	3
		Col %	16%	20%	100%	14%	19%	22%		21%			7%	25%
Total	Count		353	133	58	216	37	9	5	24	6	83	69	12

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 8 Mean	3.8	3.4	5.4	3.6	3.5	2.7	3.2	4.0	4.3	3.4	4.1	3.4
Median	3	3	3	3	3	3	3	3	4	3	3	4
Minimum	2	3	2	2	3	2	3	2	3	3	2	2
Maximum	84	10	84	20	10	3	4	14	8	8	20	4

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.7	Full package	Count	226	92	19	148	27		4	16	4	65	54	6
	tours	Col %	64%	69%	33%	69%	73%		80%	67%	67%	78%	78%	50%
	Free-time	Count	88	34	22	47	5		1	4	2	17	11	5
	package tours	Col %	25%	26%	38%	22%	14%		20%	17%	33%	20%	16%	42%
	Individually	Count	27	7	13	14	2			4			4	1
	arranged travel	Col %	8%	5%	22%	6%	5%			17%			6%	8%
	Group tour	Count	9		2	6	3	9				1		
		Col %	3%		3%	3%	8%	100%				1%		
	Other	Count	3		2	1								
		Col %	1%		3%	0%								
Total	Count		353	133	58	216	37	9	5	24	6	83	69	12

TRAVEL MOTIVATION - SEGMENTATION

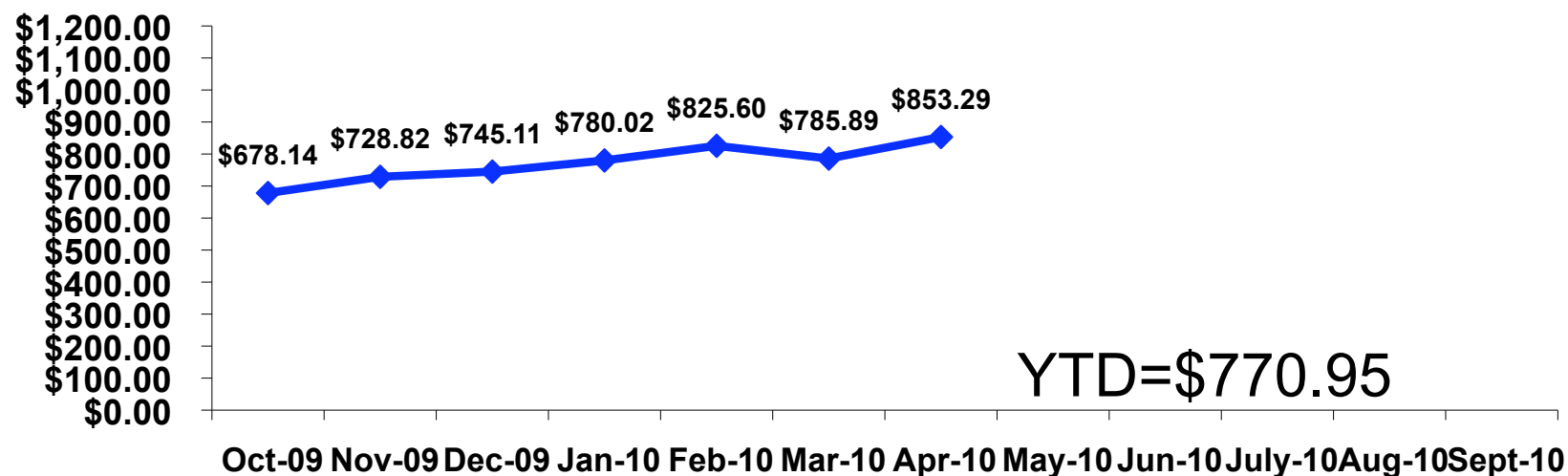
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	52%	67%	50%	53%	51%	33%	60%	50%	33%	39%	51%	42%
	Beautiful seas, beaches, tropical climate	41%	45%	41%	45%	32%	44%	60%	46%	33%	35%	36%	58%
	Honeymoon	24%	2%		25%	30%	11%	60%	21%	50%	100%	42%	
	Short travel time	26%	28%	36%	26%	32%	33%	40%	21%		17%	20%	33%
	It is a safe place to spend a vacation	23%	33%	38%	23%	30%	11%		8%	17%	12%	23%	8%
	Recommendation of friend, relative, travel agency	19%	26%		21%	11%	11%		8%		24%	17%	
	Shopping	12%	12%	17%	13%	16%	11%	20%	4%		11%	9%	8%
	Pleasure	8%	11%	22%	11%	5%			13%	17%	4%	13%	8%
	Water sports	9%	11%	9%	9%	11%		20%	17%		8%	12%	
	A previous visit	8%	11%	48%	6%	5%			8%			4%	8%
	My company sponsored me	8%	5%	7%	10%	22%	78%		8%			6%	8%
	Price of the tour package	7%	8%	9%	6%	11%		20%	4%		6%	6%	8%
	SCUBA diving	3%	3%	5%	4%	5%			8%	17%	5%	12%	8%
	To visit friends or relatives	4%	4%	12%	2%	5%			4%			1%	
	To get married or Attend wedding	2%	2%		2%					100%	4%	6%	8%
	To golf	2%	2%	5%	2%	3%			17%			1%	25%
	Other	2%	5%	3%	3%	3%						1%	
	Promotional materials from GVB	2%	2%	2%	2%				8%		1%	3%	8%
	Company or Business trip	2%		5%	1%	3%							8%
	Organized Sporting Activity	1%	2%		1%			20%			1%	1%	
	Career certification or testing	2%	1%	2%	0%	3%							
	Special promotion	0%			0%								
Total	Cases	353	133	58	216	37	9	5	24	6	83	69	12

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	79%	86%	67%	81%	81%	89%	80%	75%	83%	81%	86%	50%
	Travel agent brochure	50%	44%	24%	53%	49%	22%	40%	46%	50%	71%	65%	50%
	Friend or relative	22%	22%	19%	24%	19%	44%	40%	17%	17%	23%	14%	17%
	I have been to Guam before	17%	20%	100%	14%	19%	22%		21%			7%	25%
	Company travel department	15%	11%	9%	15%	14%	22%	40%	17%	17%	22%	19%	17%
	TV	9%	8%	10%	8%				13%		8%	1%	33%
	Guam promo activities	8%	8%	9%	8%	14%		20%	8%		1%	3%	8%
	Travel guide book at bookstores	7%	10%	2%	6%	11%	11%		8%	17%	5%	4%	
	Magazine	3%	3%		3%				8%		5%	4%	
	Newspaper	3%	3%	7%	3%	3%				17%	1%	4%	8%
	Pod casts	0%		2%									
Total	Cases	351	133	58	216	37	9	5	24	6	83	69	12

SECTION 3 **EXPENDITURES**

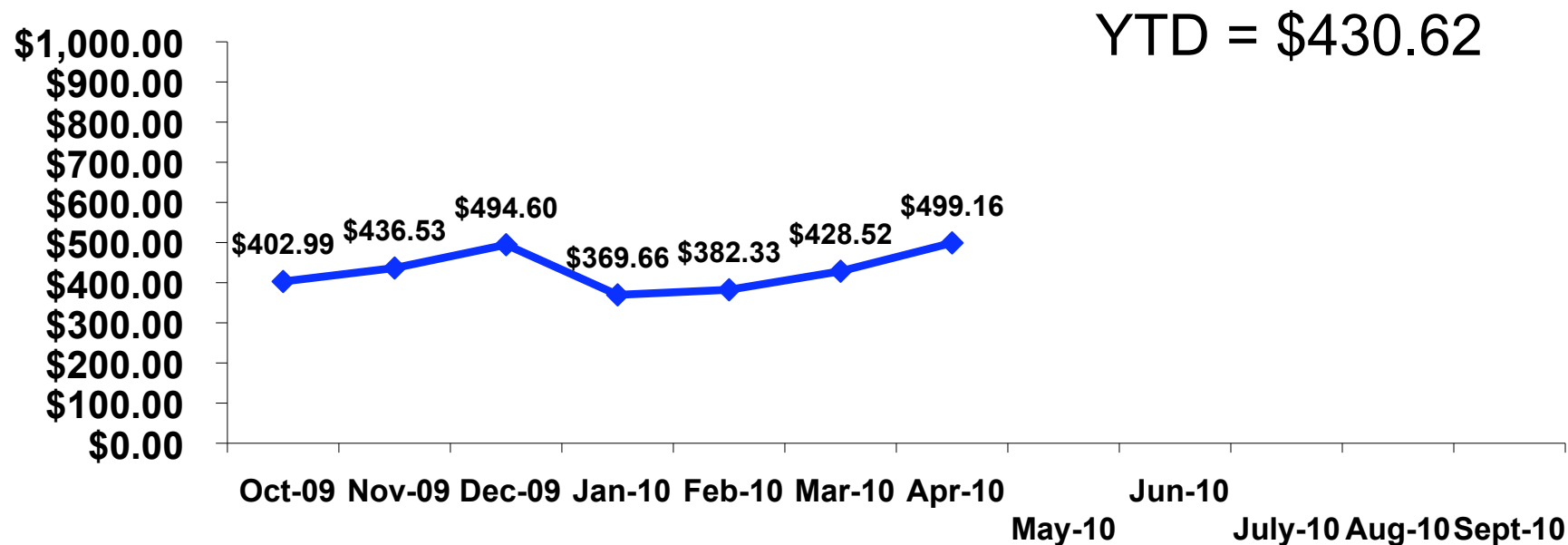
PREPAID EXPENDITURES - TRACKING



PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$853.29	\$700.91	\$713.36	\$892.41	\$820.74	\$378.29	\$325.71	\$897.61	\$1,188.53	\$1,214.38	\$1,067.34	\$482.94
per	Median	\$882	\$770	\$725	\$888	\$962	\$0	\$189	\$780	\$1,288	\$1,332	\$1,066	\$544
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$444.08	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$4,796.08	\$1,767.44	\$4,440.81	\$4,796.08	\$1,989.48	\$1,332.24	\$783.80	\$4,796.08	\$1,520.98	\$3,197.39	\$4,796.08	\$1,154.61

ON-ISLAND EXPENDITURES - TRACKING



ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

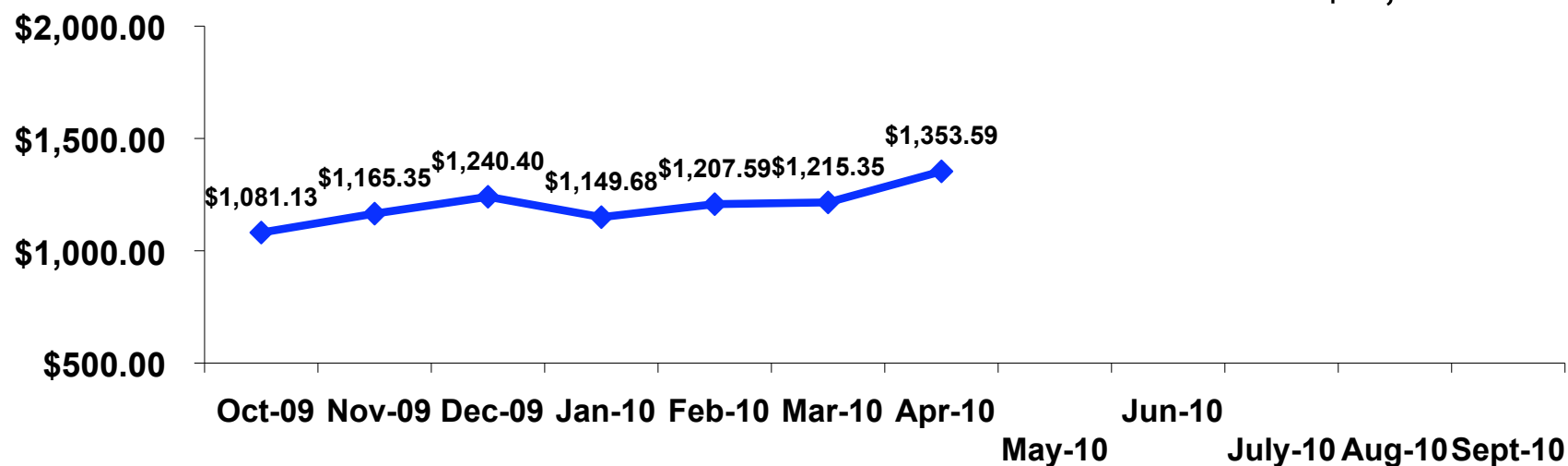
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$499.16	\$322.73	\$675.49	\$468.34	\$412.21	\$480.44	\$762.00	\$378.65	\$256.11	\$515.27	\$487.97	\$932.54
	Median	\$300	\$250	\$365	\$300	\$250	\$300	\$350	\$175	\$275	\$350	\$300	\$500
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$84.00	\$0.00	\$0.00	\$120.00	\$0.00	\$0.00	\$0.00
	Maximum	\$5,000.00	\$1,900.00	\$5,000.00	\$4,500.00	\$1,800.00	\$1,500.00	\$2,450.00	\$1,550.00	\$333.33	\$2,450.00	\$2,500.00	\$4,600.00

ON-ISLAND EXPENSE - BREAKDOWN

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$66.30	\$69.48	\$94.14	\$36.98	\$55.27	\$5.00	\$0.00	\$69.58	\$66.67	\$25.54	\$35.12	\$750.91
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$29.62	\$28.19	\$54.57	\$25.37	\$10.14	\$2.78	\$2.00	\$29.17	\$50.00	\$31.69	\$22.61	\$31.82
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$47.86	\$59.56	\$124.31	\$47.66	\$24.19	\$1.11	\$12.00	\$29.17	\$191.67	\$31.72	\$37.68	\$59.09
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00
OPTIONAL TOUR	Mean	\$124.94	\$101.72	\$80.86	\$148.19	\$123.24	\$199.44	\$108.00	\$135.00	\$188.33	\$194.34	\$183.48	\$145.91
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$190.00	\$170.00	\$140.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$271.46	\$264.93	\$335.07	\$260.86	\$192.70	\$72.11	\$579.00	\$134.17	\$161.67	\$271.89	\$212.90	\$654.55
	Median	\$40.00	\$80.00	\$100.00	\$60.00	\$40.00	\$20.00	\$95.00	\$0.00	\$100.00	\$15.00	\$0.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$153.27	\$122.76	\$139.83	\$173.16	\$165.05	\$202.22	\$258.00	\$80.00	\$233.33	\$204.31	\$190.49	\$248.64
	Median	\$0.00	\$0.00	\$15.00	\$45.00	\$50.00	\$80.00	\$20.00	\$0.00	\$200.00	\$0.00	\$20.00	\$0.00
LOCAL TRANS	Mean	\$35.93	\$35.25	\$64.05	\$42.77	\$8.54	\$5.56	\$5.00	\$42.50	\$41.67	\$14.20	\$16.90	\$12.73
	Median	\$0.00	\$0.00	\$6.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$404.21	\$612.55	\$265.83	\$342.02	\$168.92	\$276.67	\$2.00	\$253.96	\$83.33	\$213.73	\$231.52	\$896.36
	Median	\$50.00	\$80.00	\$42.50	\$60.00	\$70.00	\$10.00	\$0.00	\$25.00	\$35.00	\$42.00	\$50.00	\$1,000.00

TOTAL EXPENDITURES - TRACKING

YTD=\$1,201.88



TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,353.59	\$1,023.64	\$1,388.85	\$1,360.75	\$1,241.62	\$858.74	\$1,087.71	\$1,276.25	\$1,444.65	\$1,729.65	\$1,555.32	\$1,415.48
	Median	1249.46	1053.09	1105.16	1280.35	1228.62	400.00	1006.00	1096.68	1496.22	1706.59	1521.06	1004.94
	Minimum	.00	.00	.00	.00	125.00	84.00	.00	.00	777.41	.00	.00	357.14
	Maximum	8940.81	2432.90	5888.16	8940.81	3789.48	2332.24	2638.73	4796.08	1813.60	4103.96	4796.08	4600.00

SECTION 4 **ADVANCED STATISTICS**

ANALYSIS TECHNIQUE

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p \leq .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2009, Jan, Feb, Mar, Apr 2010 and Overall Oct 2009 - Apr 2010								
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	Combined Oct 2009 - Apr 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	2	2	2	4	3
Ease of getting around							6	5
Safety walking around at night								
Quality of daytime tours	2	2	2		3	3	1	2
Variety of daytime tours	4			3				6
Quality of nighttime tours								7
Variety of nighttime tours								
Quality of shopping					4		5	
Variety of shopping							2	4
Price of things on Guam				4				
Quality of hotel accommodations	1	1	1	1	1	1	3	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	43.1%	53.2%	52.0%	55.9%	48.2%
NOTE: Only significant variables are ranked.								

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by six significant factors in the April 2010 Period, by rank order they are:
 - **Quality of day time tours,**
 - **Variety of shopping,**
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks,**
 - **Quality of shopping, and**
 - **Ease of getting around.**
- With all six factors the overall r^2 is .559 meaning that **55.9% of overall satisfaction is accounted for by these six factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009, and Jan, Feb, Mar, Apr 2010 and Overall Oct 2009 - Apr 2010								
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	Combined Oct 2009 - Apr 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks								
Ease of getting around								
Safety walking around at night								
Quality of daytime tours			1					
Variety of daytime tours								1
Quality of nighttime tours								
Variety of nighttime tours								
Quality of shopping				2				
Variety of shopping				3		1		
Price of things on Guam								
Quality of hotel accommodations	1			1				
% of Overall Satisfaction Accounted For	1.5%	0.0%	2.3%	5.9%	0.0%	0.0%	0.0%	0.3%
NOTE: Only significant variables are ranked.								

Drivers of Per Person On Island Expenditure

- **There were no significant drivers of Per Person On-Island Expenditures during the April 2010 period.**