



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2011 MARKET SEGMENTATION –

DECEMBER 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 **354** departing Korean visitors were randomly interviewed at the Guam A.B. Won Pat International Airport's departure and waiting areas.
- The margin of error for a sample of **354** 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

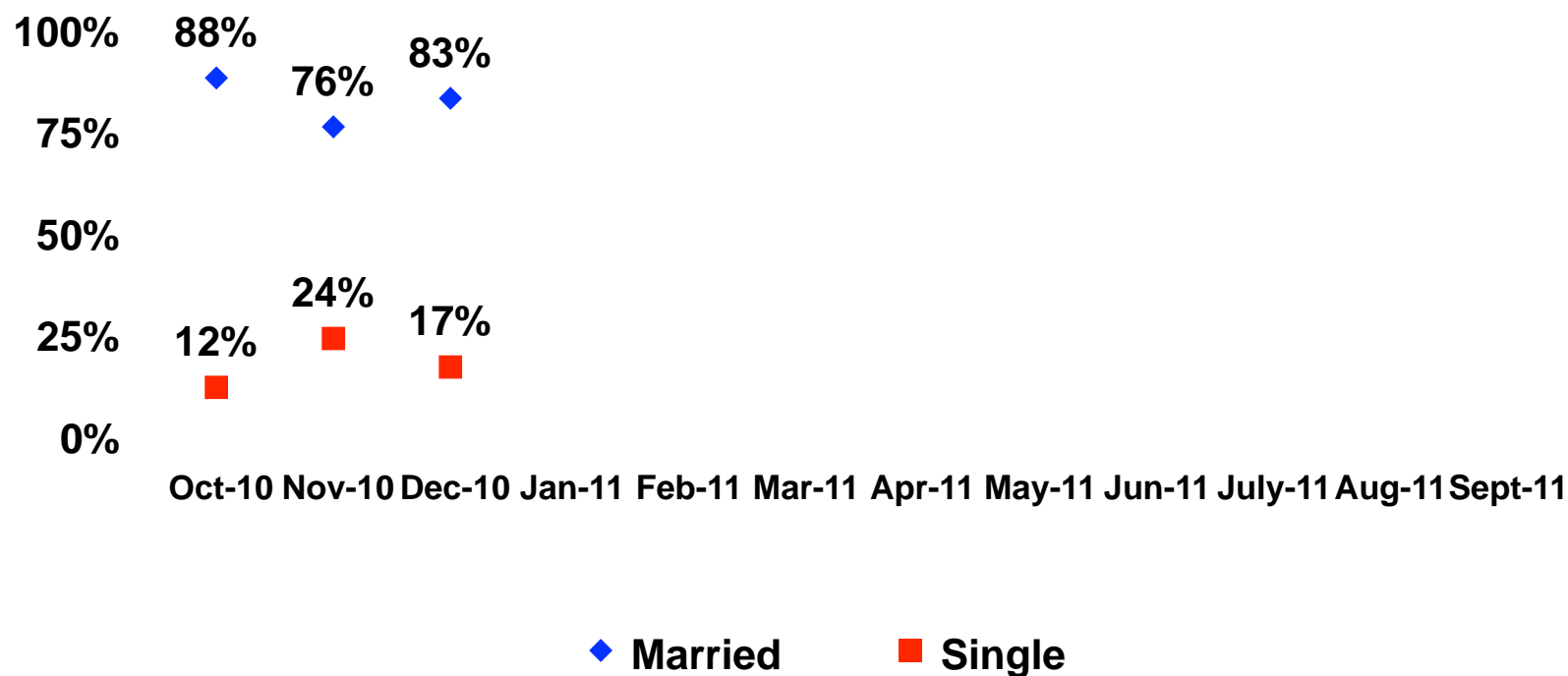
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 10	Nov 10	Dec 10	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	Jul 11	Aug 11	Sept 11
Families	41%	42%	31%									
Repeaters	14%	17%	18%									
Shoppers	54%	62%	57%									
Seniors	4%	5%	6%									
OL/Salary woman	10%	11%	16%									
Group Travelers	5%	6%	2%									
Students	1%	2%	2%									
Golfers	5%	7%	9%									
Wedding	1%	1%	1%									
Divers	17%	24%	17%									
Honey- mooners	25%	13%	28%									
TOTAL	353	352	354									

SECTION 1 **PROFILE OF RESPONDENTS**

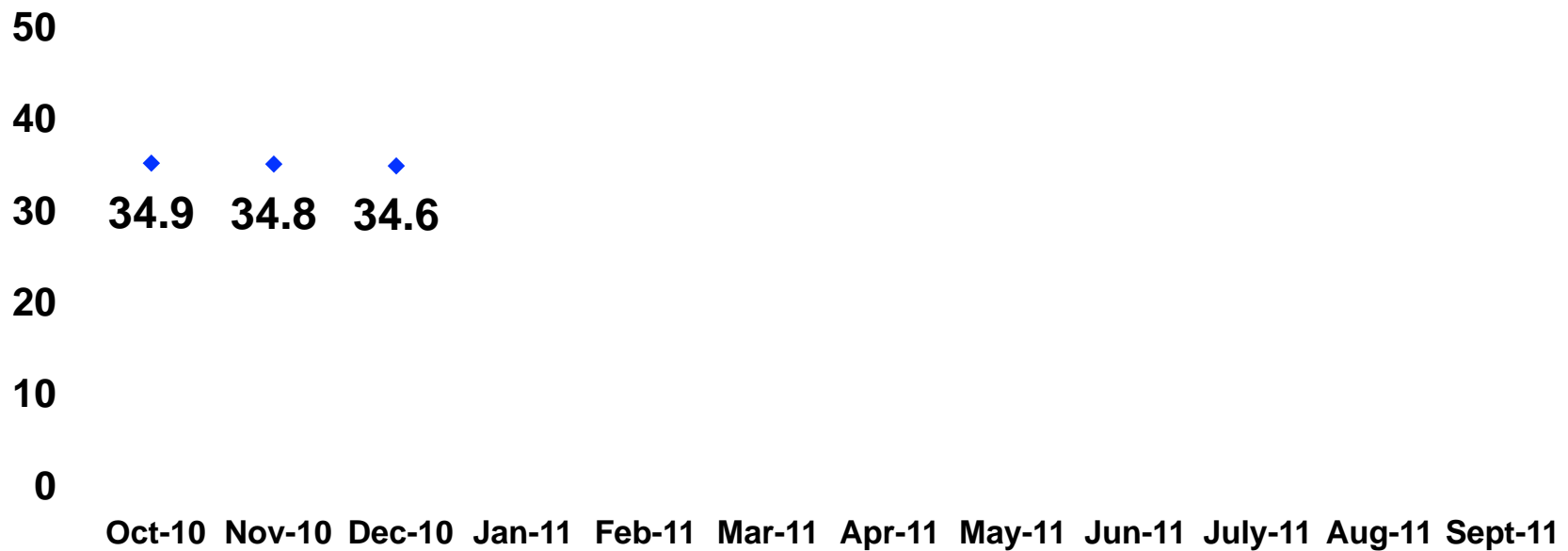
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	293	95	52	170	42	4	4	23	1	99	57	18
		Col %	83%	86%	84%	84%	72%	57%	50%	70%	33%	100%	93%	90%
	Single	Count	61	15	10	33	16	3	4	10	2		4	2
		Col %	17%	14%	16%	16%	28%	43%	50%	30%	67%		7%	10%
Total	Count		354	110	62	203	58	7	8	33	3	99	61	20

Average Age Tracking



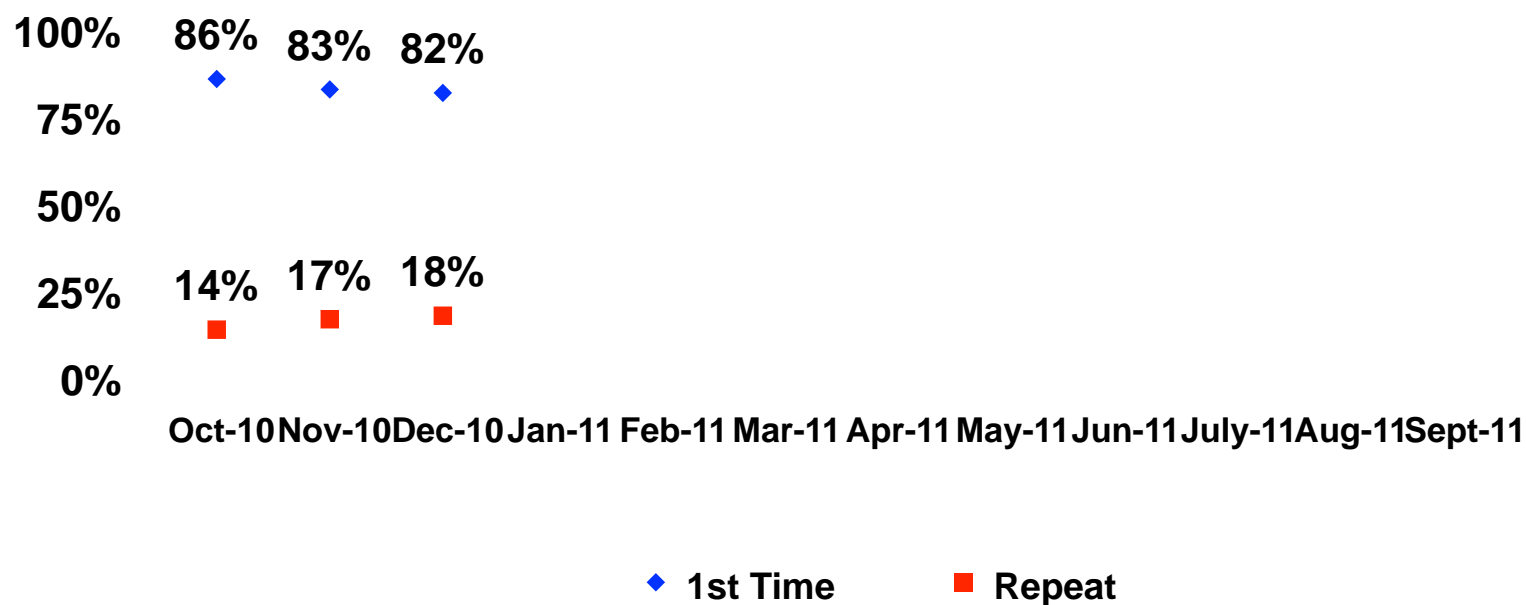
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	190	26	17	121	43	2	4	20	3	84	42	
		Col %	54%	24%	27%	60%	74%	29%	50%	61%	100%	85%	69%	
	35-54	Count	153	81	41	79	15	4	2	12		15	19	9
		Col %	43%	74%	66%	39%	26%	57%	25%	36%		15%	31%	45%
	55+	Count	11	3	4	3		1	2	1				11
		Col %	3%	3%	6%	1%		14%	25%	3%				55%
Total	Count		354	110	62	203	58	7	8	33	3	99	61	20
C	Mean		34.6	37.3	38.8	33.4	30.7	39.9	38.9	35.0	27.7	30.3	32.6	55.2
	Median		34	37	38	32	30	36	33	33	28	29	31	55

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count	8	3	3	3				2		3	2	1
		Col %	2%	3%	5%	2%				6%		3%	3%	6%
	KW12M-KW24M	Count	31	4	3	18	7	1	2	3	1	10	6	1
		Col %	9%	4%	5%	9%	12%	14%	33%	9%	33%	10%	10%	6%
	KW24M-KW36M	Count	52	4	2	33	8		1	2		29	12	
		Col %	15%	4%	3%	17%	14%		17%	6%		30%	20%	
	KW36M-KW48M	Count	75	21	8	43	18	2		4	2	28	17	2
		Col %	22%	20%	13%	22%	31%	29%		12%	67%	29%	28%	12%
	KW48M-KW60M	Count	60	19	13	35	14		1	5		17	13	2
		Col %	17%	18%	21%	18%	24%		17%	15%		17%	21%	12%
	KW60M-KW72M	Count	37	17	5	25	5	2		5		4	4	2
		Col %	11%	16%	8%	13%	9%	29%		15%		4%	7%	12%
	KW72M+	Count	75	38	25	37	5	1		10		5	5	9
		Col %	22%	36%	41%	19%	9%	14%		30%		5%	8%	53%
	No Income	Count	9	1	2	6	1	1	2	2		2	2	
		Col %	3%	1%	3%	3%	2%	14%	33%	6%		2%	3%	
Total	Count		347	107	61	200	58	7	6	33	3	98	61	17

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	292	85		173	51	6	8	23	3	96	55	12
		Col %	82%	77%		85%	88%	86%	100%	70%	100%	97%	90%	60%
	No	Count	62	25	62	30	7	1		10		3	6	8
		Col %	18%	23%	100%	15%	12%	14%		30%		3%	10%	40%
Total	Count		354	110	62	203	58	7	8	33	3	99	61	20

Average Length of Stay Tracking



Average Length of Stay Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 8 Mean	3.6	3.3	4.8	3.4	3.2	3.6	3.3	3.9	3.0	3.3	3.7	5.3
Median	3	3	3	3	3	4	3	3	3	3	3	4
Minimum	2	2	2	2	2	3	3	2	3	3	3	3
Maximum	30	9	30	25	5	4	4	25	3	5	25	30

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.7	Full package tours	Count	227	73	24	138	35		5	18	1	93	54	5
		Col %	64%	66%	39%	68%	60%		63%	55%	33%	94%	89%	25%
	Free-time package tours	Count	75	28	22	40	10		2	6	2	6	4	5
		Col %	21%	25%	35%	20%	17%		25%	18%	67%	6%	7%	25%
	Individually arranged travel	Count	19	8	11	10	3		1	2			1	4
		Col %	5%	7%	18%	5%	5%		13%	6%			2%	20%
	Group tour	Count	7		1	4	1	7		2			1	1
		Col %	2%		2%	2%	2%	100%		6%			2%	5%
	Other	Count	1											
		Col %	0%											
	Company paid travel	Count	25	1	4	11	9			5			1	5
		Col %	7%	1%	6%	5%	16%			15%			2%	25%
Total	Count		354	110	62	203	58	7	8	33	3	99	61	20

Travel Motivation Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	49%	61%	47%	46%	49%	29%	57%	44%	100%	34%	48%	40%
	Beautiful seas, beaches, tropical climate	41%	57%	29%	44%	47%	29%	57%	28%		38%	34%	30%
	Honeymoon	28%		5%	38%	26%		43%	25%	33%	100%	57%	
	Short travel time	26%	40%	39%	22%	30%		29%	28%		19%	18%	10%
	It is a safe place to spend a vacation	22%	35%	24%	20%	21%	14%	29%	22%		18%	15%	10%
	Recommendation of friend, relative, travel agency	17%	21%	2%	19%	21%		14%	13%		22%	16%	5%
	Shopping	10%	14%	18%	11%	19%			16%	67%	9%	8%	10%
	My company sponsored me	13%	2%	13%	14%	23%	43%		28%		1%	7%	15%
	Pleasure	7%	8%	13%	10%	11%		14%	16%	33%	8%	8%	5%
	A previous visit	7%	15%	42%	5%	4%			9%		1%	2%	10%
	Water sports	9%	10%	8%	9%	7%	14%		13%		8%	7%	10%
	Price of the tour package	6%	6%	8%	6%	2%	14%	14%	6%	33%	9%	7%	5%
	To golf	4%	2%	11%	2%		29%	14%	31%		1%	2%	20%
	To visit friends or relatives	4%	3%	11%	3%			14%	9%			3%	15%
	SCUBA diving	3%		6%	2%			14%			3%	11%	10%
	Company or Business trip	4%		10%	2%	7%	14%		6%				15%
	Organized Sporting Activity	2%	4%	2%	1%	4%			6%		1%		5%
	Promotional materials from GVB	1%	1%		2%	4%					2%	2%	
	Other	2%	1%	3%	1%				3%			2%	
	To get married or Attend wedding	1%			1%					100%	1%		
	Convention, Conference, Trade show	1%			0%				3%				
	Special promotion	0%			0%	2%							
Total	Cases	352	110	62	202	57	7	7	32	3	99	61	20

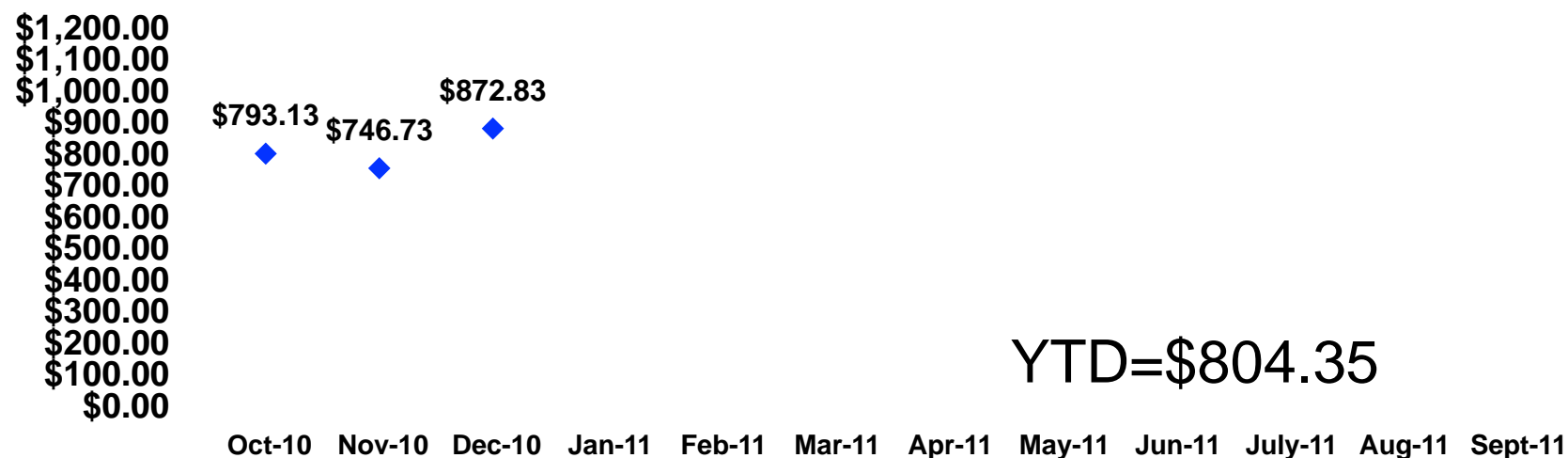
Information Sources

Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	81%	91%	76%	83%	90%	86%	88%	70%	100%	79%	80%	55%
	Travel agent brochure	48%	45%	29%	51%	47%	57%	38%	48%	33%	67%	52%	35%
	Friend or relative	23%	35%	16%	20%	21%	14%	63%	15%		19%	10%	20%
	I have been to Guam before	17%	23%	98%	14%	10%	14%		30%		3%	10%	40%
	Company travel department	17%	9%	5%	18%	16%		13%	21%		20%	26%	20%
	TV	12%	13%	16%	11%	7%	14%	38%	15%		11%	11%	30%
	Guam promo activities	10%	5%	10%	10%	9%		13%	9%		15%	16%	10%
	Travel guide book at bookstores	5%	5%	3%	6%	9%			3%		6%	8%	
	Newspaper	5%	6%	6%	6%	7%			3%		2%	3%	
	Magazine	3%	2%	3%	2%	3%		13%	3%		3%	3%	
Total	Cases	354	110	62	203	58	7	8	33	3	99	61	20

SECTION 3 **EXPENDITURES**

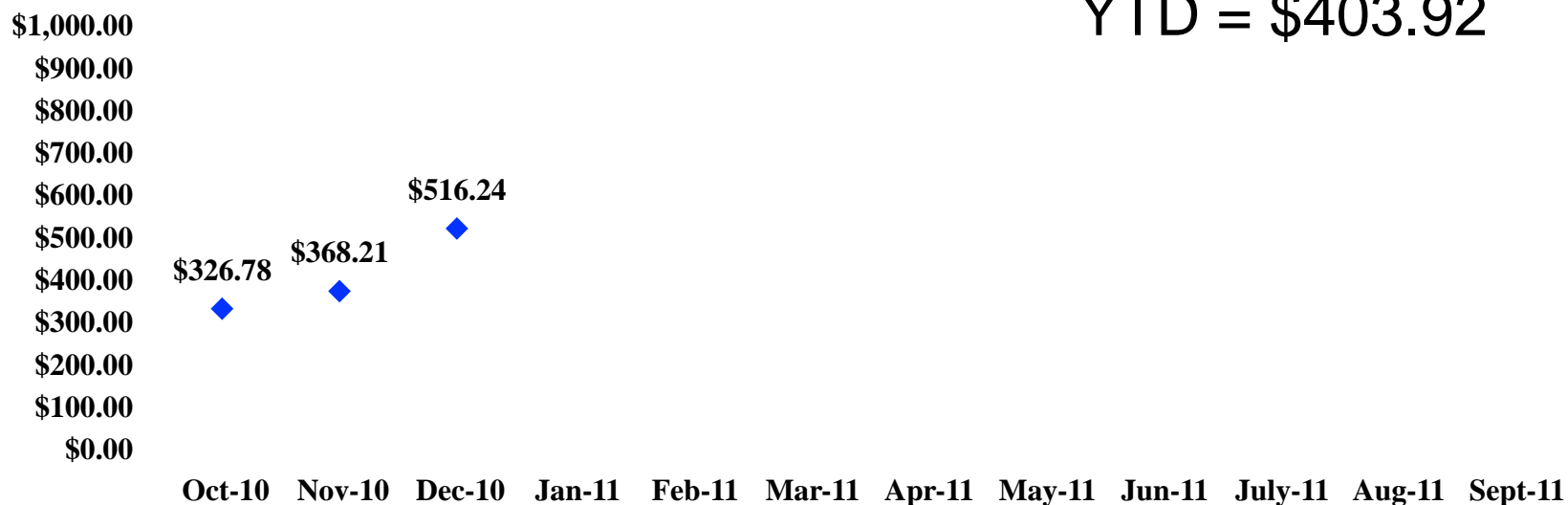
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid	Mean	\$872.83	\$860.80	\$786.43	\$972.93	\$781.29	\$569.83	\$941.58	\$794.69	\$1,513.69	\$1,303.37	\$1,026.98	\$485.24
per	Median	\$925	\$885	\$877	\$1,026	\$928	\$0	\$575	\$877	\$1,403	\$1,403	\$1,153	\$374
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,314.98	\$0.00	\$0.00	\$0.00
converted to \$	Maximum	\$4,248.27	\$4,248.27	\$2,980.63	\$4,248.27	\$2,279.30	\$1,446.48	\$2,717.63	\$2,980.63	\$1,823.44	\$4,032.61	\$4,032.61	\$1,297.45

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	\$516.24	\$306.67	\$685.96	\$544.16	\$544.19	\$481.43	\$306.25	\$768.45	\$827.67	\$548.19	\$472.78	\$757.13
	Median	\$300	\$199	\$333	\$340	\$305	\$50	\$145	\$400	\$798	\$400	\$400	\$500
	Minimum	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$550.00	\$.00	\$.00	\$.00
	Maximum	\$4,000.00	\$2,500.00	\$4,000.00	\$3,190.00	\$3,190.00	\$1,700.00	\$1,000.00	\$2,600.00	\$1,135.00	\$3,190.00	\$2,445.00	\$4,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$31.93	\$51.53	\$52.05	\$19.49	\$13.17	\$0.00	\$0.00	\$23.64	\$2.67	\$9.40	\$32.69	\$93.65
	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	Mean	\$17.82	\$14.64	\$29.50	\$22.36	\$10.89	\$0.00	\$6.25	\$29.39	\$3.33	\$20.82	\$26.11	\$14.35
REST/CONV	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-OUT- SIDE	Mean	\$36.49	\$39.87	\$99.84	\$37.87	\$24.02	\$0.00	\$12.50	\$81.82	\$83.33	\$10.06	\$48.59	\$62.50
HOTEL/ REST	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
OPTIONAL	Mean	\$144.62	\$156.99	\$131.52	\$164.66	\$95.53	\$17.14	\$23.75	\$91.73	\$166.67	\$197.70	\$219.46	\$55.25
TOUR	Median	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.00	\$170.00	\$0.00
GIFT/	Mean	\$254.03	\$259.92	\$399.52	\$326.84	\$414.68	\$0.00	\$116.13	\$357.91	\$659.33	\$333.23	\$171.10	\$410.00
SOUV-SELF	Median	\$0.00	\$21.00	\$60.00	\$12.50	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$0.00	\$15.00	\$0.00
GIFT/ SOUV-	Mean	\$149.54	\$102.28	\$98.68	\$176.99	\$153.68	\$221.43	\$53.75	\$131.67	\$83.33	\$260.83	\$127.36	\$44.00
F&F AT HOME	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$33.00	\$0.00	\$0.00	\$0.00	\$0.00	\$85.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$18.87	\$24.42	\$42.29	\$23.15	\$8.00	\$0.00	\$0.00	\$23.45	\$83.33	\$16.02	\$14.15	\$31.50
	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
OTHER EXP	Mean	\$330.79	\$303.62	\$436.94	\$305.32	\$285.95	\$283.33	\$484.50	\$524.84	\$11.67	\$243.28	\$246.64	\$470.50
	Median	\$20.00	\$50.00	\$30.00	\$20.00	\$9.00	\$0.00	\$105.00	\$30.00	\$10.00	\$11.00	\$20.00	\$20.00

Total Expenditures Tracking

YTD=\$1,208.28



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,389.07	\$1,167.47	\$1,472.39	\$1,517.09	\$1,325.48	\$1,051.25	\$1,247.83	\$1,563.14	\$2,341.36	\$1,851.56	\$1,499.76	\$1,242.36
	Median	1291.55	1151.63	1336.57	1409.65	1238.35	120.00	1140.30	1254.65	2537.65	1901.48	1538.88	1017.97
	Minimum	.00	.00	.00	.00	20.00	.00	.00	.00	1864.98	.00	.00	.00
	Maximum	5035.36	4648.27	4980.63	5035.36	5035.36	2946.48	2967.63	4980.63	2621.44	5035.36	4862.61	4137.32

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 ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

51

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2010, and Overall Oct 2010- Dec 2010

	Oct-10	Nov-10	Dec-10	Combined Oct 2010 - Dec 2010
Independent Variables:	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	2	2
Ease of getting around				
Safety walking around at night				
Quality of daytime tours		1		5
Variety of daytime tours	2		4	3
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping			3	4
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations	1	2	1	1
% of Overall Satisfaction Accounted For	54.5%	38.5%	57.9%	49.9%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by four significant factors in the December 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks,**
 - **Quality of shopping, and**
 - **Variety of day time tours.**
- With all four factors the overall r^2 is .579 meaning that **57.9% of overall satisfaction is accounted for by these four factors.**

51

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2010, and Overall Oct - Dec 2010

	Oct-10	Nov-10	Dec-10	Combined Oct - Dec 2010
	rank	rank	rank	rank
Independent Variables:				
Cleanliness of beaches & parks				
Ease of getting around				2
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping	1			1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
% of Overall Satisfaction Accounted For	1.8%	0.0%	0.0%	1.4%
NOTE: Only significant variables are ranked.				

Drivers of Per Person On Island Expenditure

- **There are no significant predictors (drivers) of Per Person On Island Expenditure in the December 2010 period.**