



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2010 MARKET SEGMENTATION –

FEBRUARY 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 +/- 5.22 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

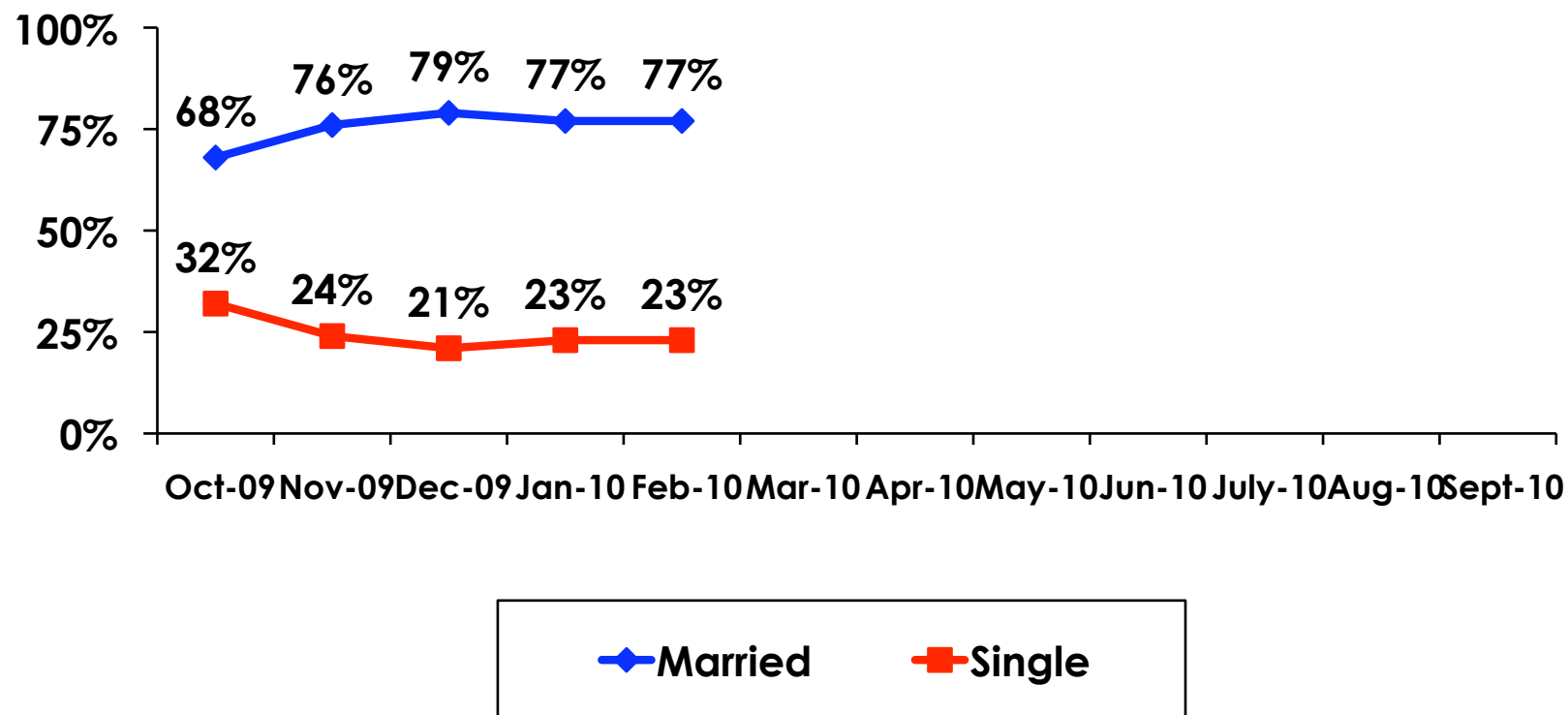
Highlighted Segments

	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%							
Repeaters	25%	21%	19%	21%	25%							
Shoppers	51%	60%	57%	52%	49%							
Seniors	3%	5%	5%	4%	5%							
OL/Salary woman	11%	15%	13%	8%	9%							
Group Travelers	5%	3%	6%	3%	1%							
Students	3%	2%	1%	1%	1%							
Golfers	7%	5%	4%	7%	7%							
Wedding	1%	1%	1%	1%	1%							
Divers	20%	20%	22%	19%	16%							
Honey- mooners	17%	21%	23%	12%	14%							
TOTAL	352	352	353	351	352							5

SECTION 1

PROFILE OF RESPONDENTS

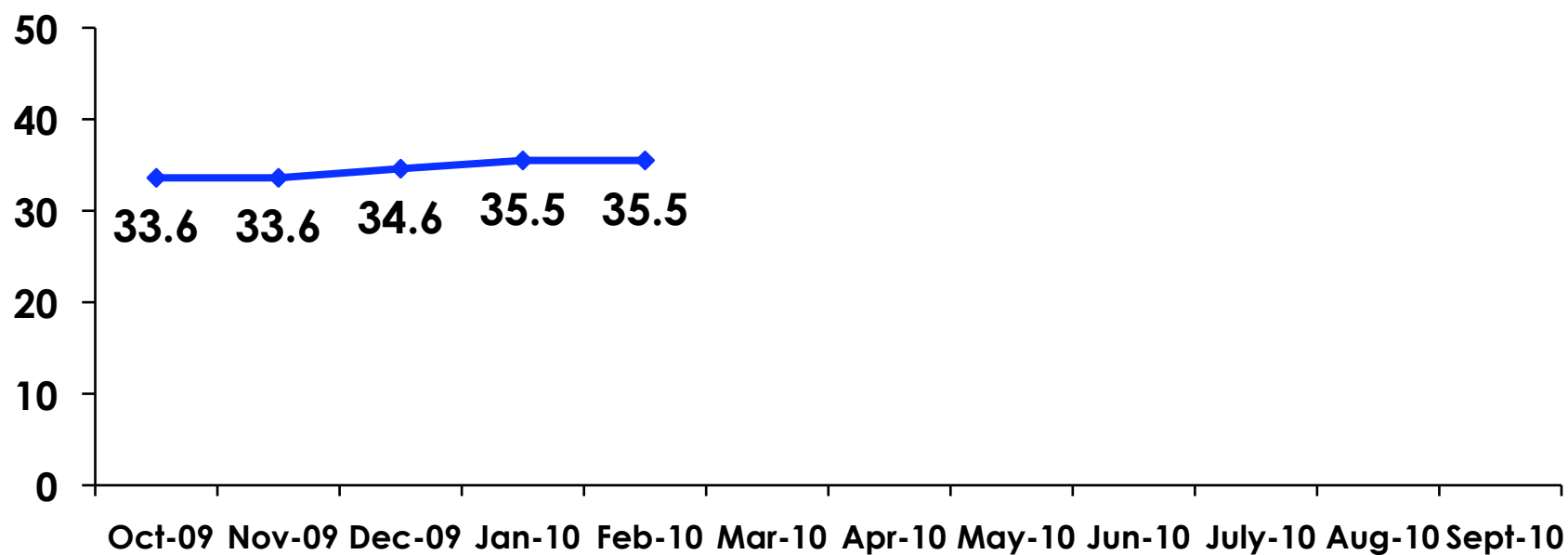
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	272	155	70	138	17	1	1	18	3	48	44	18
		Col %	77%	88%	80%	80%	53%	33%	20%	78%	100%	98%	79%	95%
	Single	Count	80	22	18	35	15	2	4	5		1	12	1
		Col %	23%	12%	20%	20%	47%	67%	80%	22%		2%	21%	5%
Total	Count		352	177	88	173	32	3	5	23	3	49	56	19

Average Age Tracking



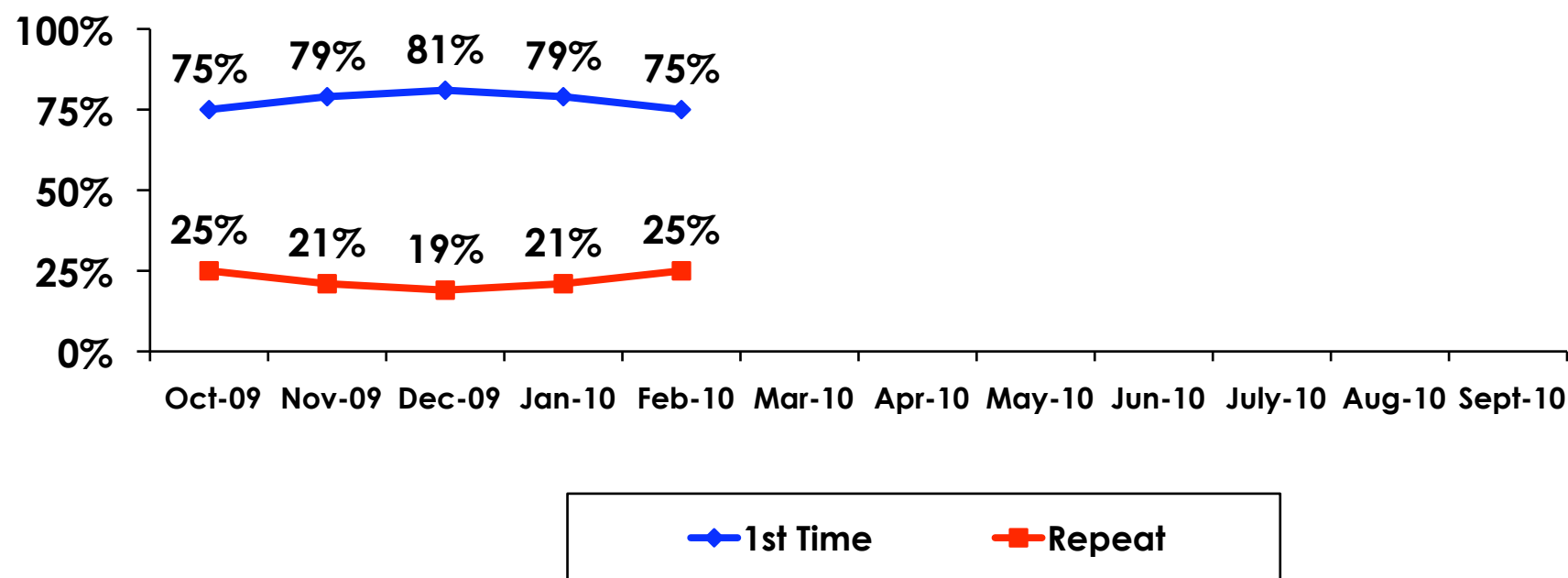
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	162	49	35	79	22	2	4	9	2	42	32	
		Col %	46%	28%	40%	46%	69%	67%	80%	39%	67%	86%	57%	
	35-54	Count	178	124	50	88	10		1	12	1	7	21	7
		Col %	51%	70%	57%	51%	31%		20%	52%	33%	14%	38%	37%
	55+	Count	12	4	3	6		1		2			3	12
		Col %	3%	2%	3%	3%		33%		9%			5%	63%
Total	Count		352	177	88	173	32	3	5	23	3	49	56	19
C	Mean		35.5	37.5	36.7	35.6	31.8	39.7	31.6	37.1	37.0	29.6	34.3	57.0
	Median		35	38	38	35	29	28	29	38	32	28	33	56

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 31	Less than KW12 million	Count	5	3	3	1								
		Col %	1%	2%	3%	1%								
	KW12M-KW24M	Count	20	2	3	10	4	1	1	1		8	2	
		Col %	6%	1%	3%	6%	13%	33%	20%	5%		17%	4%	
	KW24M-KW36M	Count	46	13	8	27	10		1	1	1	14	10	
		Col %	13%	8%	9%	16%	32%		20%	5%	33%	29%	19%	
	KW36M-KW48M	Count	40	15	7	21	5			1	1	4	8	3
		Col %	12%	9%	8%	13%	16%			5%	33%	8%	15%	17%
	KW48M-KW60M	Count	45	25	8	20	2	1	1	3		8	8	2
		Col %	13%	15%	9%	12%	6%	33%	20%	14%		17%	15%	11%
	KW60M-KW72M	Count	32	23	9	15	1			1		2	5	4
		Col %	9%	13%	10%	9%	3%			5%		4%	9%	22%
	KW72M+	Count	136	87	45	63	9	1	1	12	1	8	15	8
		Col %	40%	51%	52%	38%	29%	33%	20%	57%	33%	17%	28%	44%
	No Income	Count	18	4	3	10			1	2		4	5	1
		Col %	5%	2%	3%	6%			20%	10%		8%	9%	6%
Total	Count		342	172	86	167	31	3	5	21	3	48	53	18

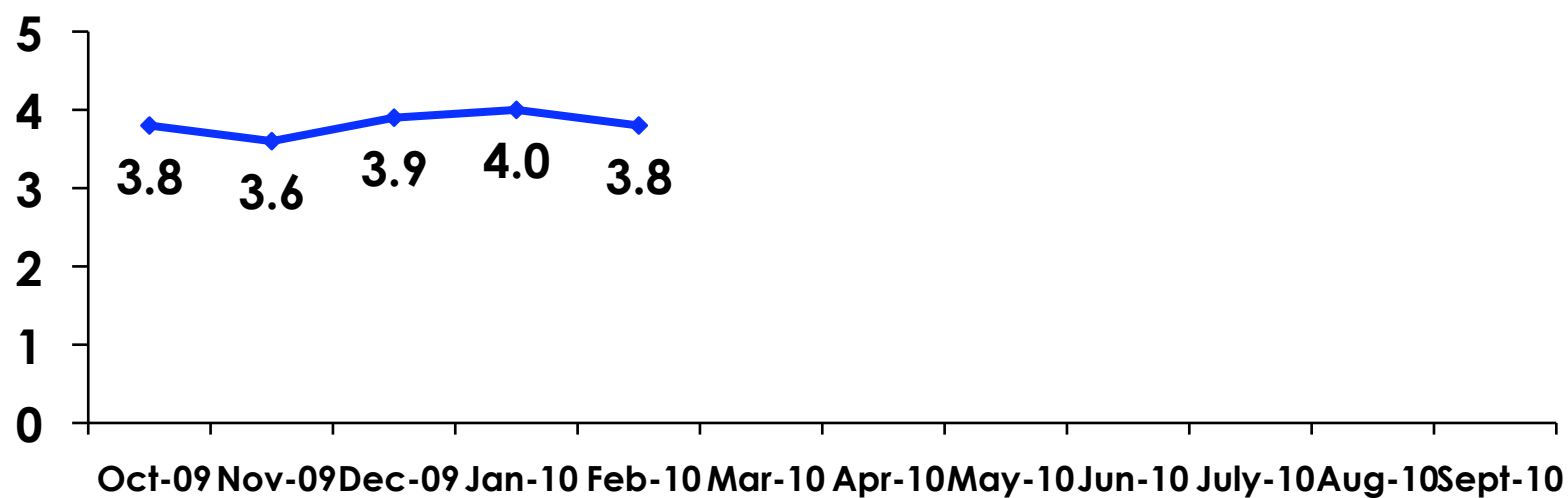
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 3A	Yes	Count	264	135		135	26	2	2	17	3	44	51	15
		Col %	75%	76%		78%	81%	67%	40%	74%	100%	90%	91%	79%
	No	Count	88	42	88	38	6	1	3	6		5	5	4
		Col %	25%	24%	100%	22%	19%	33%	60%	26%		10%	9%	21%
Total	Count		352	177	88	173	32	3	5	23	3	49	56	19

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	3.8	3.5	4.3	3.7	3.2	4.0	4.2	5.0	3.3	3.4	3.7	5.2
Median	3	3	4	3	3	4	4	4	3	3	3	4
Minimum	1	2	1	1	1	2	2	1	3	3	1	3
Maximum	23	14	23	23	4	6	7	23	4	5	23	13

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	193	112	32	104	17		1	10	1	37	36	10
		Col %	55%	63%	36%	60%	53%		20%	43%	33%	76%	64%	53%
	Free-time package tours	Count	117	51	32	58	15		2	5	2	11	14	4
		Col %	33%	29%	36%	34%	47%		40%	22%	67%	22%	25%	21%
	Individually arranged travel	Count	35	13	20	8			2	6			5	4
		Col %	10%	7%	23%	5%			40%	26%			9%	21%
	Group tour	Count	3		1	1		3		1			1	1
		Col %	1%		1%	1%		100%		4%			2%	5%
	Other	Count	4	1	3	2				1		1		
		Col %	1%	1%	3%	1%				4%		2%		
Total	Count		352	177	88	173	32	3	5	23	3	49	56	19

Travel Motivation Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	56%	68%	51%	62%	75%	67%	40%	39%	67%	35%	48%	63%
	Beautiful seas, beaches, tropical climate	46%	52%	36%	51%	50%			39%	67%	43%	50%	47%
	Short travel time	25%	33%	25%	29%	34%			17%		18%	27%	16%
	It is a safe place to spend a vacation	24%	28%	26%	27%	22%		20%	13%	33%	24%	21%	26%
	Honeymoon	14%	1%	6%	18%	16%				33%	100%	20%	
	Shopping	13%	15%	15%	18%	31%			9%		4%	14%	5%
	Recommendation of friend, relative, travel agency	14%	17%	3%	17%	22%		20%	9%		12%	16%	11%
	A previous visit	9%	12%	36%	8%	6%			9%		6%	5%	
	Water sports	10%	10%	6%	13%	13%			9%	33%	8%	18%	5%
	Pleasure	9%	8%	14%	7%	19%			13%	33%	6%	7%	11%
	Career certification or testing	7%	1%	16%	3%			60%	4%		2%	2%	
	Price of the tour package	5%	5%	3%	6%	13%					4%	2%	
	To golf	3%	3%	3%	2%		33%		30%			4%	26%
	To visit friends or relatives	4%	4%	6%	3%				17%			4%	11%
	My company sponsored me	4%	3%		5%	3%			4%			7%	
	Company or Business trip	3%		9%	1%		33%		9%			2%	11%
	Promotional materials from GVB	2%	2%	1%	2%	6%			4%		2%	2%	5%
	Other	2%	2%	1%	2%	3%					2%		11%
	SCUBA diving	2%	1%	1%	1%							9%	5%
	To get married or Attend wedding	1%			1%					100%	2%		
	Organized Sporting Activity	1%	1%	1%					4%				
	Special promotion	0%											
Total	Cases	352	177	88	173	32	3	5	23	3	49	56	19

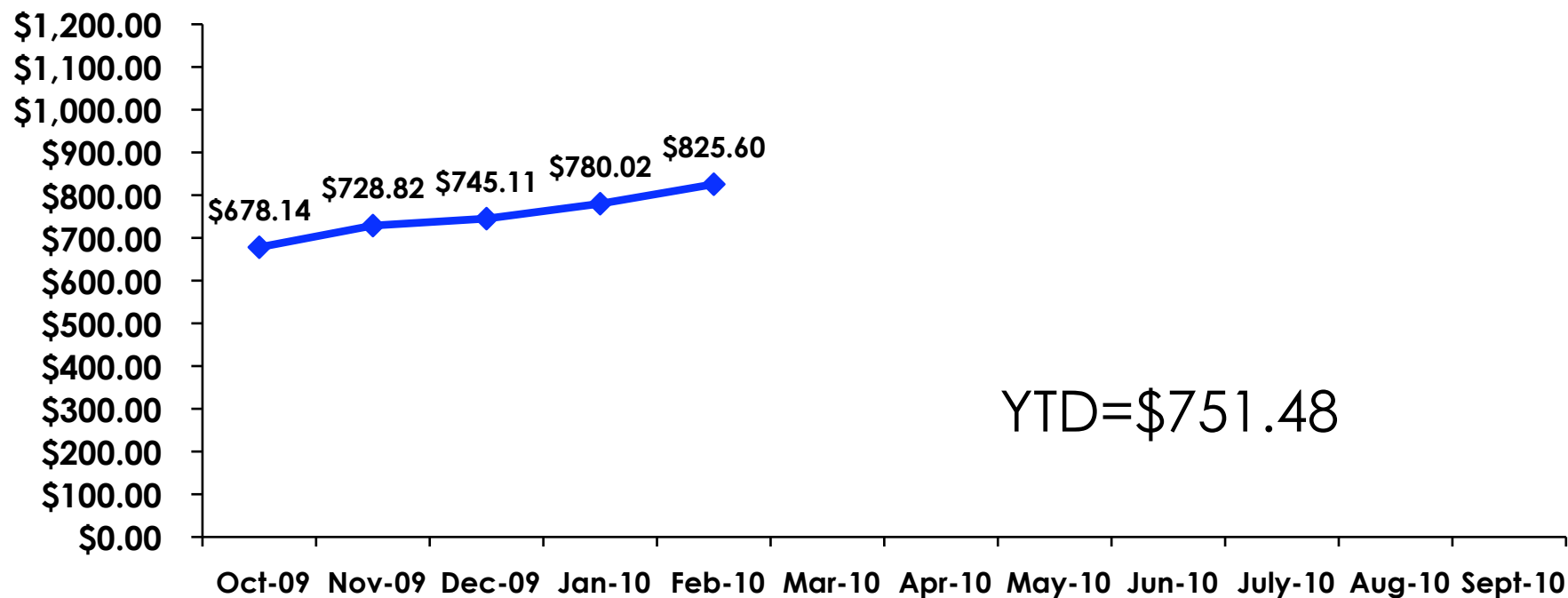
Information Sources

Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	87%	91%	83%	90%	94%	33%	100%	83%	100%	78%	89%	68%
	Travel agent brochure	49%	42%	20%	53%	59%	67%	40%	39%	67%	86%	64%	58%
	I have been to Guam before	23%	22%	91%	20%	16%	33%	60%	17%		10%	7%	21%
	Friend or relative	23%	24%	17%	24%	16%	33%	20%	30%	33%	18%	29%	32%
	Company travel department	9%	8%	5%	9%	22%	33%		9%	33%	4%	11%	11%
	Guam promo activities	8%	8%	6%	12%	13%					14%	7%	16%
	TV	9%	8%	9%	7%	9%	67%		9%		4%	11%	11%
	Travel guide book at bookstores	6%	3%	6%	6%	9%			4%		6%	4%	5%
	Magazine	5%	7%	6%	4%	6%		20%	4%			2%	11%
	Newspaper	4%	6%	7%	3%				4%			7%	5%
Total	Cases	351	177	88	172	32	3	5	23	3	49	56	19

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

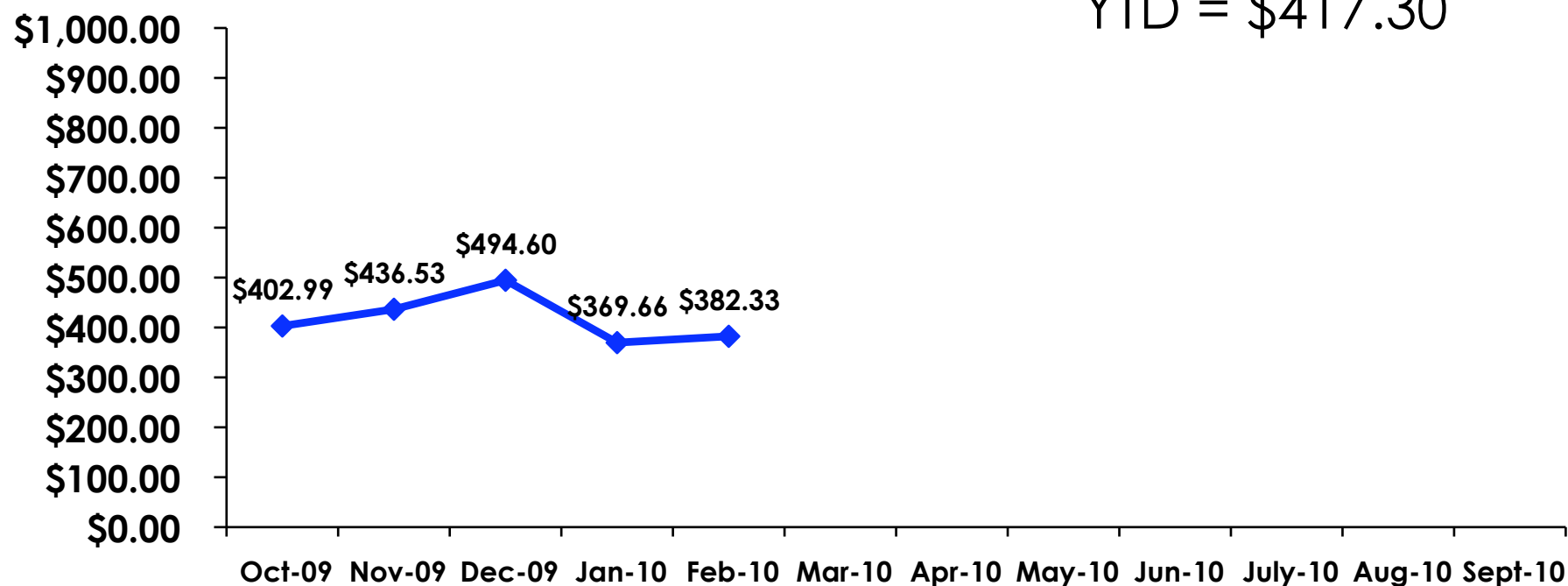


Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$825.60	\$787.50	\$743.58	\$865.12	\$863.13	\$948.35	\$727.45	\$691.36	\$849.20	\$1,077.97	\$797.53	\$585.19
	Median	\$862	\$862	\$862	\$868	\$862	\$1,121	\$603	\$717	\$888	\$1,254	\$849	\$718
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$197.43	\$0.00	\$556.08	\$0.00	\$0.00	\$0.00
	Maximum	\$2,741.59	\$2,153.18	\$2,155.34	\$2,741.59	\$2,586.41	\$1,724.27	\$1,310.36	\$1,379.42	\$1,103.53	\$2,741.59	\$2,413.98	\$1,370.80

On-Island Expenditures Per Person Tracking

YTD = \$417.30



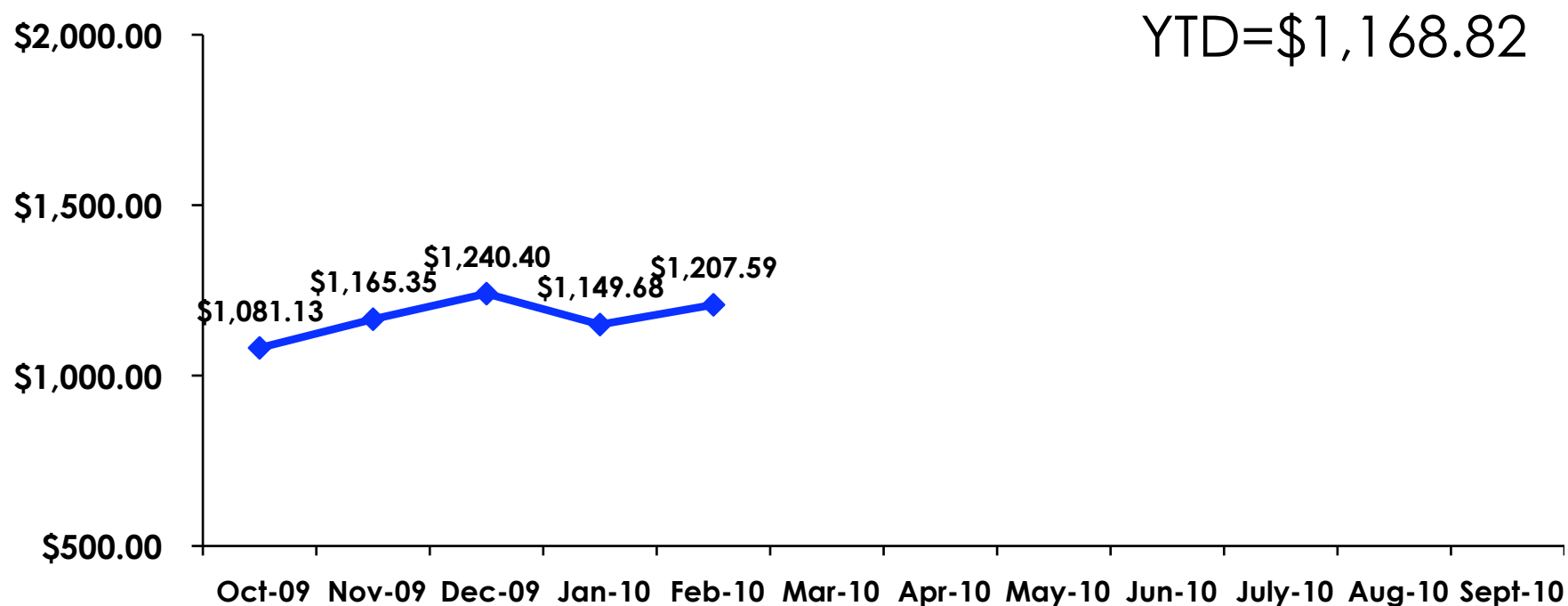
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$382.33	\$325.33	\$429.02	\$402.27	\$364.49	\$283.33	\$700.00	\$287.84	\$585.00	\$475.96	\$336.86	\$503.43
	Median	\$250	\$173	\$250	\$300	\$214	\$200	\$850	\$200	\$443	\$300	\$200	\$350
	Minimum	\$.00	\$.00	\$.00	\$.00	\$.00	\$150.00	\$50.00	\$.00	\$262.50	\$.00	\$.00	\$.00
	Maximum	\$3,375.00	\$3,375.00	\$3,000.00	\$3,375.00	\$3,375.00	\$500.00	\$1,400.00	\$1,000.00	\$1,050.00	\$2,330.00	\$2,000.00	\$1,630.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$58.11	\$77.96	\$105.16	\$39.10	\$1.88	\$0.00	\$0.00	\$96.09	\$33.33	\$4.80	\$12.68	\$52.11
	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-FF	Mean	\$27.09	\$33.66	\$21.07	\$18.55	\$10.00	\$33.33	\$30.00	\$63.91	\$26.67	\$22.27	\$16.46	\$21.05
REST/CONV	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE	Mean	\$34.91	\$38.67	\$53.51	\$37.88	\$35.22	\$0.00	\$60.00	\$29.87	\$86.67	\$13.94	\$30.14	\$34.21
HOTEL/ REST	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00
OPTIONAL	Mean	\$126.83	\$137.54	\$55.00	\$152.92	\$99.69	\$0.00	\$200.00	\$107.39	\$56.67	\$159.29	\$201.61	\$155.05
TOUR	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00
GIFT/	Mean	\$216.15	\$281.24	\$251.70	\$279.60	\$437.72	\$166.67	\$280.00	\$102.91	\$56.67	\$196.22	\$132.52	\$170.00
SOUV-SELF	Median	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$70.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV-	Mean	\$116.58	\$95.11	\$97.76	\$165.65	\$144.72	\$63.33	\$140.00	\$129.17	\$470.00	\$264.37	\$56.34	\$102.89
F&F AT HOME	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$210.00	\$0.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$28.02	\$30.55	\$41.90	\$26.02	\$14.06	\$0.00	\$30.00	\$45.74	\$73.33	\$11.22	\$12.09	\$25.26
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$70.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$356.88	\$410.79	\$415.23	\$329.12	\$183.13	\$70.00	\$240.00	\$140.30	\$346.67	\$237.27	\$330.07	\$923.21
	Median	\$60.00	\$70.00	\$15.00	\$70.00	\$65.00	\$10.00	\$0.00	\$0.00	\$150.00	\$50.00	\$45.00	\$120.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,207.59	\$1,112.83	\$1,172.60	\$1,267.39	\$1,227.62	\$1,231.68	\$1,427.45	\$979.20	\$1,434.20	\$1,553.93	\$1,134.39	\$1,093.62
	Median	1143.75	1068.52	1089.17	1178.30	1109.43	1270.78	1510.36	944.30	1150.50	1532.14	1052.57	1215.57
	Minimum	.00	.00	.00	.00	.00	200.00	247.43	.00	998.58	.00	.00	.00
	Maximum	5528.18	5528.18	5155.34	5528.18	5528.18	2224.27	2003.50	2379.42	2153.53	3795.63	3324.82	3000.80

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 2010 and Overall Oct 2009 - Feb 2010						
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Combined Oct 2009 - Feb 2010
Independent Variables:	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	2	2	3
Ease of getting around						5
Safety walking around at night						
Quality of daytime tours	2	2	2		3	2
Variety of daytime tours	4			3		
Quality of nighttime tours						
Variety of nighttime tours						
Quality of shopping					4	
Variety of shopping						4
Price of things on Guam				4		
Quality of hotel accommodations	1	1	1	1	1	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	43.1%	53.2%	46.3%
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 February 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks,**
 - **Quality of daytime tours, and**
 - **Quality of shopping**
- With all four factors the overall r^2 is .532 meaning that **53.2% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009, and Jan, Feb 2010 and Overall Oct 2009 - Feb 2010						
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Combined Oct 2009 - Feb 2010
Independent Variables:	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		
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%	0.5%
NOTE: Only significant variables are ranked.						

Drivers of Per Person On Island Expenditure

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