



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2010 MARKET SEGMENTATION –

JANUARY 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 **351** 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 **351** 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

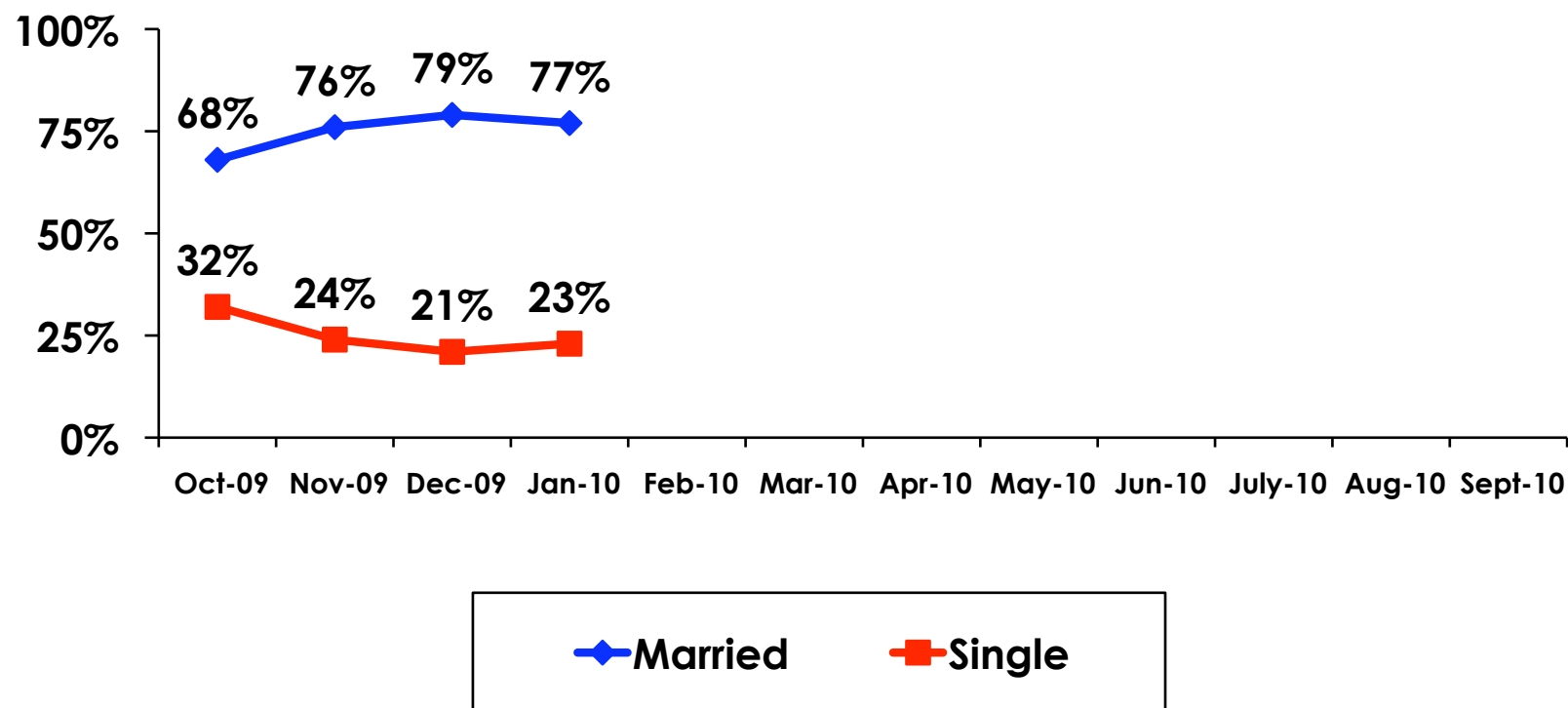
Highlighted Segments

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

SECTION 1

PROFILE OF RESPONDENTS

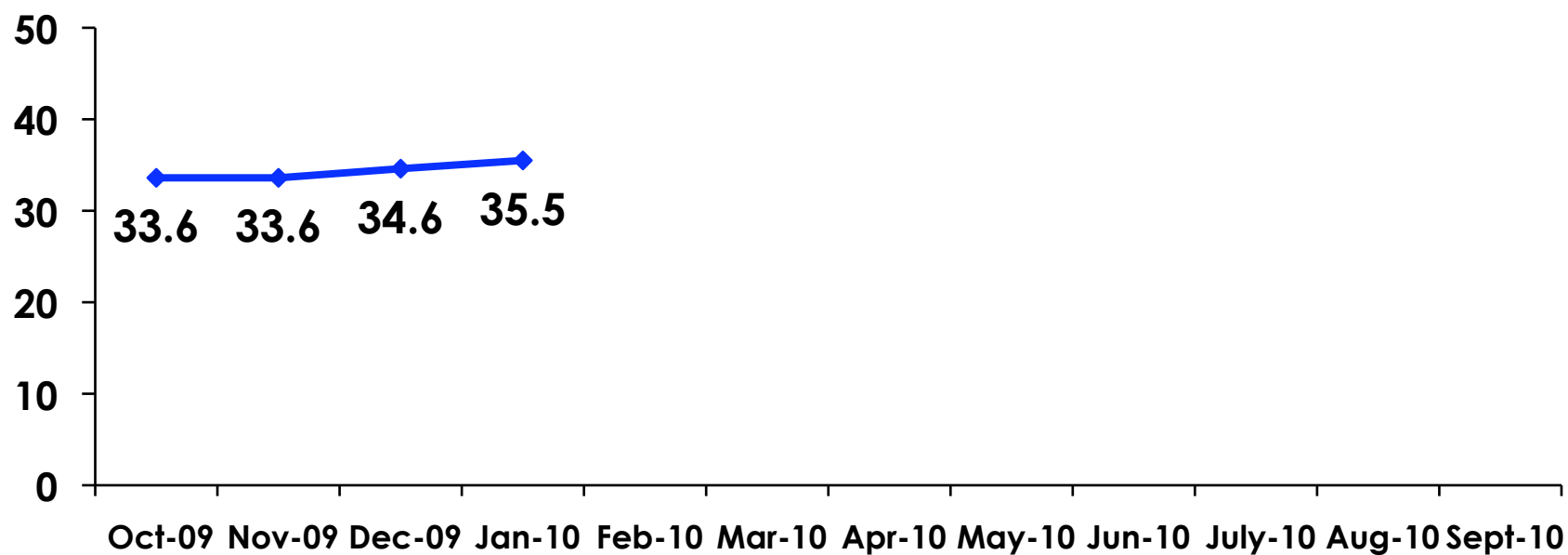
MARITAL STATUS - TRACKING



MARITAL STATUS - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	271	146	56	142	22	10	1	20	2	41	50	14
		Col %	77%	88%	78%	78%	81%	91%	33%	80%	67%	95%	74%	93%
	Single	Count	80	20	16	41	5	1	2	5	1	2	18	1
		Col %	23%	12%	22%	22%	19%	9%	67%	20%	33%	5%	26%	7%
Total	Count		351	166	72	183	27	11	3	25	3	43	68	15

AVERAGE AGE - TRACKING



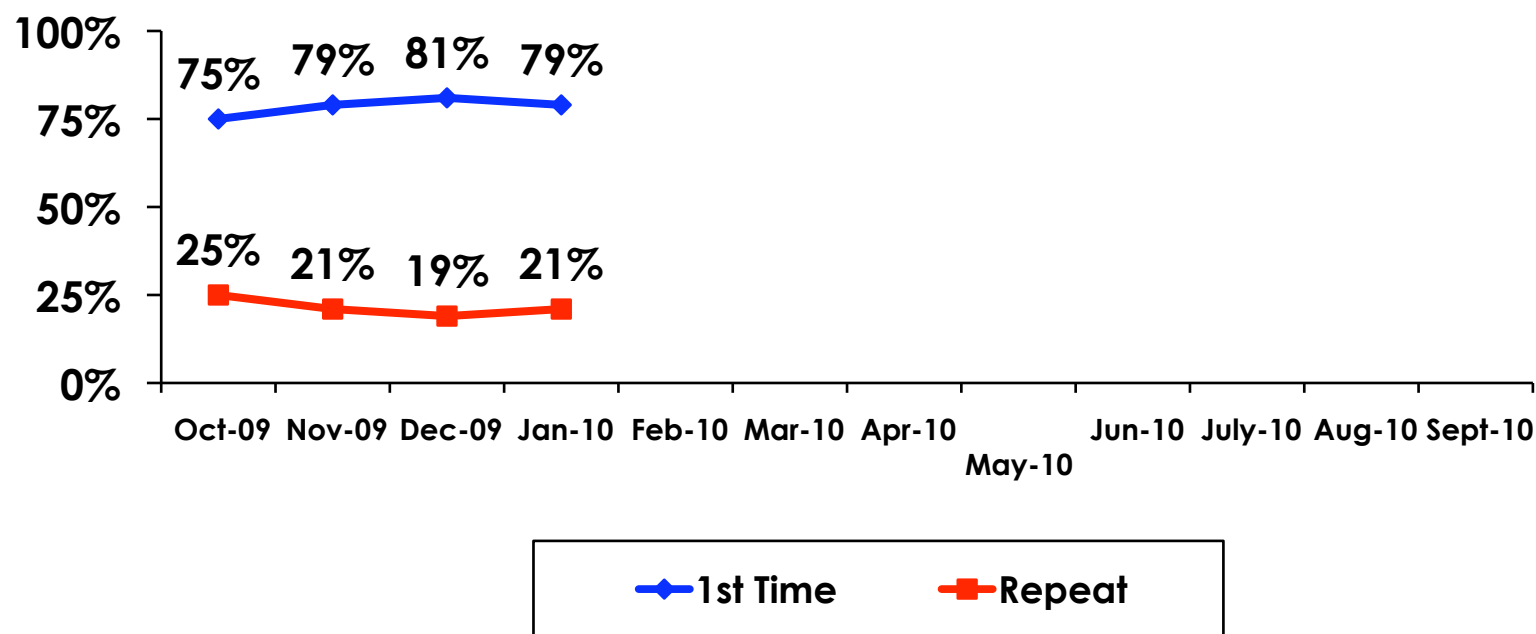
AGE - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	158	44	23	83	15	6	2	12	2	38	37	
		Col %	45%	27%	32%	45%	56%	55%	67%	48%	67%	88%	54%	
	35-54	Count	185	118	49	96	12	5	1	12	1	5	28	8
		Col %	53%	72%	68%	52%	44%	45%	33%	48%	33%	12%	41%	53%
	55+	Count	7	3		4				1			3	7
		Col %	2%	2%		2%				4%			4%	47%
Total	Count		350	165	72	183	27	11	3	25	3	43	68	15
C	Mean		35.5	37.1	36.9	35.4	33.9	37.9	34.3	37.4	30.7	30.6	34.0	55.7
	Median		35	37	37	36	34	34	32	37	34	30	33	54

INCOME - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 31	Less than KW12 million	Count	3	1		2		1				1	2	
		Col %	1%	1%		1%		10%				2%	3%	
	KW12M-KW24M	Count	15	2		9	3	1		1		5	4	1
		Col %	4%	1%		5%	12%	10%		4%		12%	6%	8%
	KW24M-KW36M	Count	58	15	6	39	6	2	1	4		19	19	1
		Col %	17%	9%	8%	22%	24%	20%	33%	16%		44%	29%	8%
	KW36M-KW48M	Count	59	20	12	31	4	1		4	1	6	7	3
		Col %	17%	13%	17%	17%	16%	10%		16%	33%	14%	11%	23%
	KW48M-KW60M	Count	53	27	7	25	6	1		2		8	6	
		Col %	16%	17%	10%	14%	24%	10%		8%		19%	9%	
	KW60M-KW72M	Count	34	26	12	19	1			3		1	6	1
		Col %	10%	16%	17%	11%	4%			12%		2%	9%	8%
	KW72M+	Count	104	62	34	49	5	4		10	1	3	20	7
		Col %	31%	39%	47%	27%	20%	40%		40%	33%	7%	30%	54%
	No Income	Count	12	5	1	5			2	1	1		2	
		Col %	4%	3%	1%	3%			67%	4%	33%		3%	
Total	Count		338	158	72	179	25	10	3	25	3	43	66	13

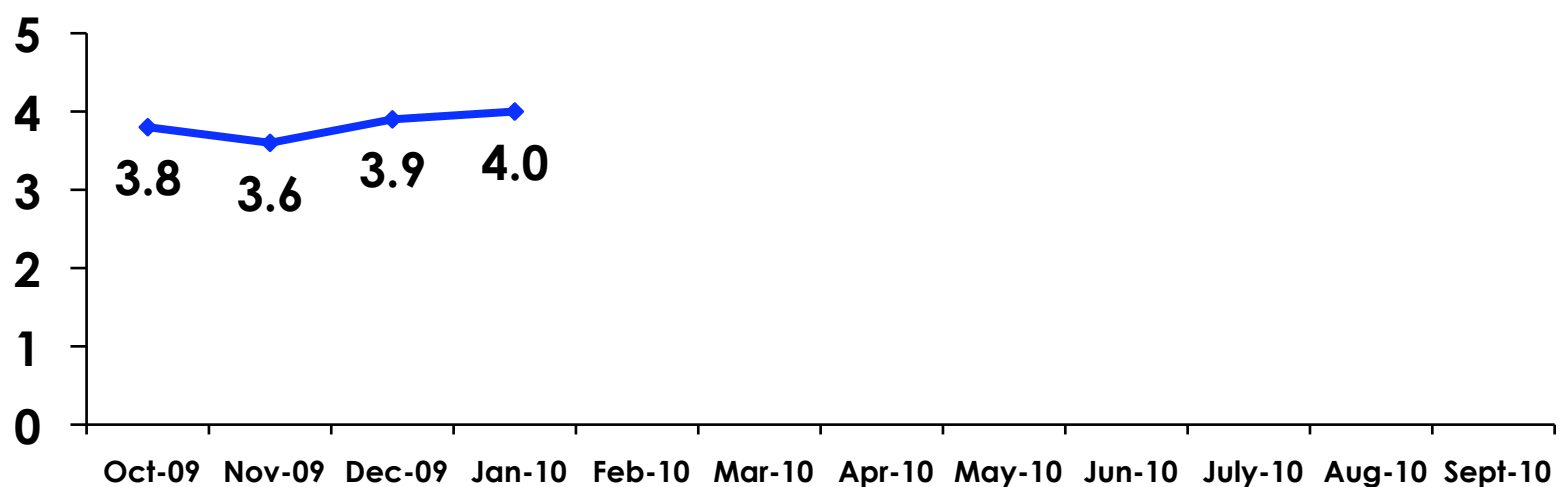
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 3A	Yes	Count	279	127		148	24	9	2	18	3	41	60	12
		Col %	79%	77%		81%	89%	82%	67%	72%	100%	95%	88%	80%
	No	Count	72	39	72	35	3	2	1	7		2	8	3
		Col %	21%	23%	100%	19%	11%	18%	33%	28%		5%	12%	20%
Total	Count		351	166	72	183	27	11	3	25	3	43	68	15

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	4.0	3.8	4.8	3.9	4.1	2.8	7.3	3.8	3.3	3.3	3.9	4.5
Median	3	4	4	3	3	3	4	4	3	3	4	4
Minimum	1	1	1	2	3	2	3	2	3	3	3	3
Maximum	28	14	28	28	22	4	15	10	4	7	10	16

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	200	110	29	112	18		1	13	1	36	39	10
		Col %	57%	67%	40%	61%	67%		33%	52%	33%	84%	58%	57%
	Free-time package tours	Count	96	45	24	41	5		1	4	2	4	19	2
		Col %	27%	27%	33%	22%	19%		33%	16%	67%	9%	28%	13%
	Individually arranged travel	Count	39	9	16	23	3			7		2	8	2
		Col %	11%	5%	22%	13%	11%			28%		5%	12%	13%
	Group tour	Count	11	1	2	7	1	11		1		1	1	1
		Col %	3%	1%	3%	4%	4%	100%		4%		2%	1%	7%
	Other	Count	4		1				1					
		Col %	1%		1%				33%					
Total	Count		350	165	72	183	27	11	3	25	3	43	67	15

TRAVEL MOTIVATION - SEGMENTATION

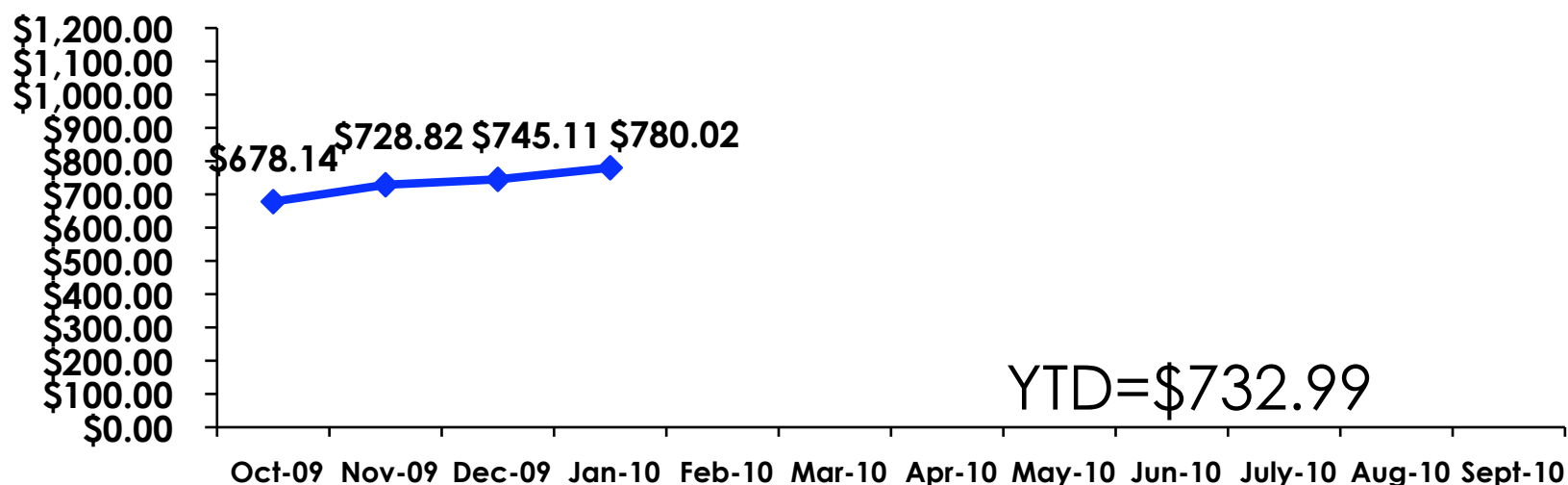
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	57%	66%	53%	61%	56%	55%	33%	60%	33%	23%	54%	47%
	Beautiful seas, beaches, tropical climate	40%	44%	42%	44%	37%	36%	33%	40%		35%	43%	33%
	Short travel time	24%	27%	21%	26%	48%	9%		32%		26%	31%	27%
	It is a safe place to spend a vacation	22%	29%	35%	27%	30%	36%		32%		19%	19%	33%
	Recommendation of friend, relative, travel agency	15%	19%	10%	16%	7%	18%		16%		14%	15%	20%
	Honeymoon	12%	1%	3%	16%	22%	9%	33%	12%		100%	22%	
	A previous visit	11%	15%	54%	10%	11%		33%	12%		5%	7%	7%
	Water sports	12%	13%	8%	15%	15%			24%		9%	16%	13%
	Pleasure	12%	13%	24%	10%	7%	18%		12%		7%	12%	20%
	Shopping	10%	8%	14%	9%	15%			8%	33%	14%	15%	
	To visit friends or relatives	6%	5%	17%	7%			33%	12%			7%	7%
	Price of the tour package	6%	7%	3%	7%	15%			4%		2%	9%	7%
	My company sponsored me	5%	1%	4%	4%		45%		4%			6%	7%
	To golf	3%	3%	8%	2%				16%		2%	1%	20%
	Company or Business trip	3%	2%	8%	3%		9%		4%		2%	1%	7%
	Other	3%	4%	6%	2%	7%			4%			3%	7%
	Organized Sporting Activity	3%	4%	3%	2%				8%			4%	
	SCUBA diving	1%	1%	3%	1%	4%						6%	7%
	Promotional materials from GVB	1%	1%	1%	2%				12%			3%	
	Career certification or testing	3%		3%									
	To get married or Attend wedding	1%	1%		1%				4%	100%		1%	
	Convention, Conference, Trade show	0%	1%									1%	
	Special promotion	0%	1%		1%								
Total	Cases	350	165	72	183	27	11	3	25	3	43	67	15

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	75%	73%	78%	75%	70%	64%	67%	64%	67%	70%	71%	60%
	Travel agent brochure	47%	51%	26%	46%	44%	36%	33%	48%	67%	51%	51%	60%
	I have been to Guam before	20%	23%	99%	19%	11%	18%	33%	28%		5%	12%	20%
	Friend or relative	23%	26%	15%	22%	22%	18%	33%	24%	33%	23%	22%	27%
	Company travel department	12%	8%	6%	12%	15%	45%	33%	4%		16%	15%	
	TV	12%	10%	8%	12%	11%	27%	33%	4%		12%	7%	20%
	Travel guide book at bookstores	9%	7%	4%	12%	7%	18%		12%		9%	7%	
	Newspaper	7%	7%	3%	7%	4%	9%		16%	33%	7%	6%	13%
	Guam promo activities	5%	5%	4%	5%	4%					5%	3%	7%
	Magazine	3%	3%	3%	4%	4%					2%	3%	13%
	Pod casts	0%	1%		1%							1%	
Total	Cases	351	166	72	183	27	11	3	25	3	43	68	15

SECTION 3 **EXPENDITURES**

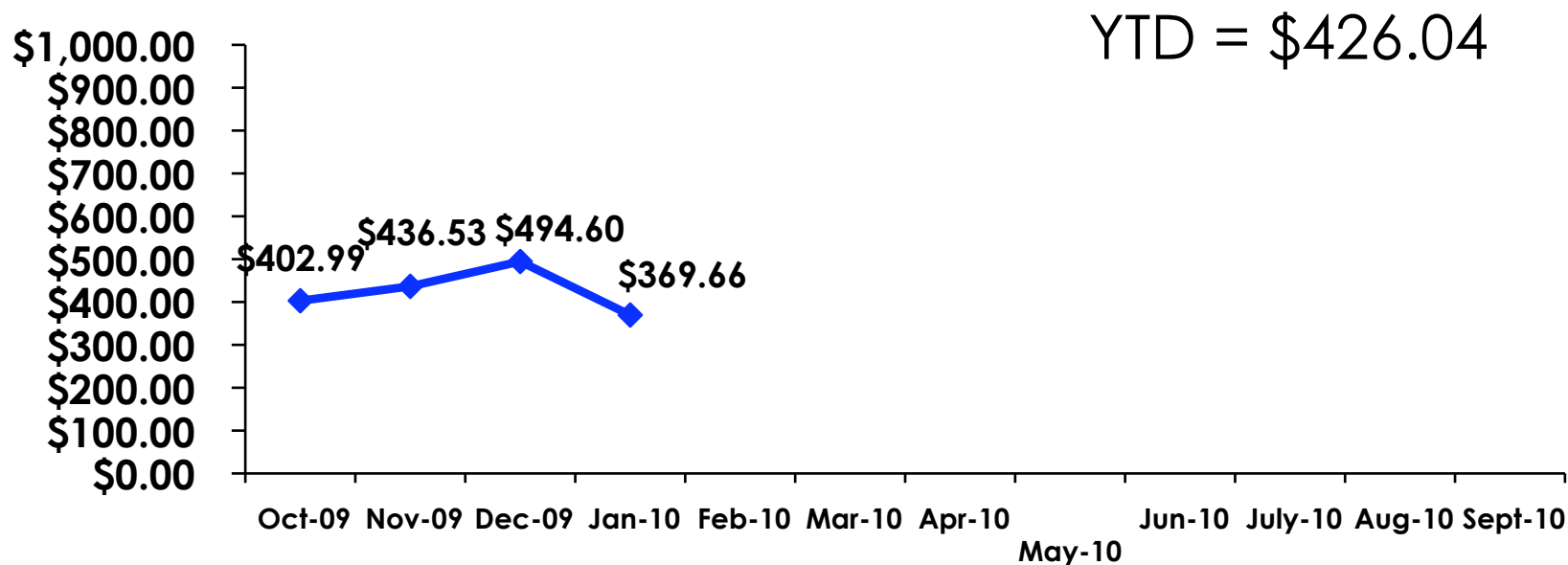
PREPAID EXPENDITURES - TRACKING



PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$780.02	\$735.71	\$723.67	\$808.54	\$936.45	\$476.38	\$352.28	\$468.62	\$825.08	\$1,098.37	\$888.44	\$531.26
	Median	\$881	\$881	\$843	\$881	\$982	\$572	\$0	\$308	\$1,177	\$1,233	\$881	\$308
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$2,642.10	\$2,091.66	\$2,113.68	\$2,377.89	\$2,377.89	\$1,321.05	\$1,056.84	\$1,761.40	\$1,298.63	\$2,377.89	\$2,642.10	\$1,409.12

ON-ISLAND EXPENDITURES - TRACKING



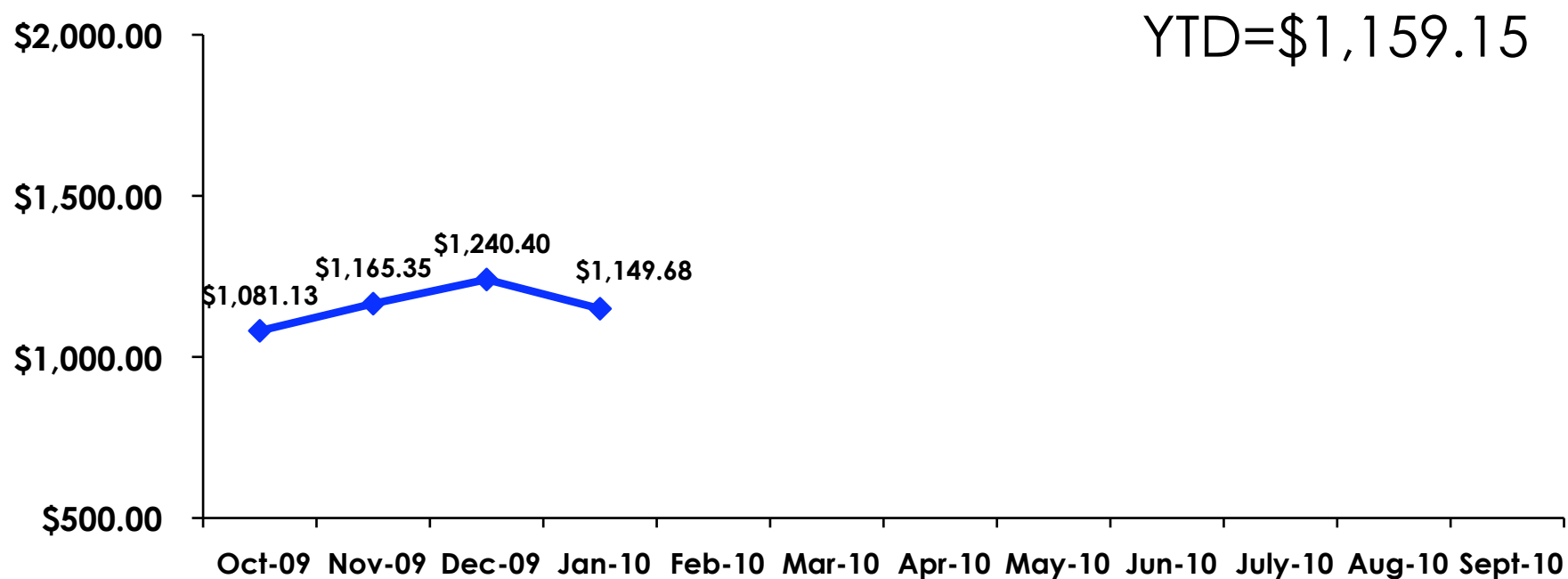
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$369.66	\$240.79	\$547.08	\$387.47	\$610.68	\$437.58	\$725.00	\$475.02	\$237.58	\$508.87	\$477.86	\$409.35
	Median	\$240	\$167	\$250	\$250	\$500	\$105	\$175	\$250	\$313	\$400	\$328	\$175
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,000.00	\$2,133.33	\$3,000.00	\$2,133.33	\$2,000.00	\$3,000.00	\$2,000.00	\$3,000.00	\$400.00	\$1,750.00	\$1,800.00	\$1,800.00

ON-ISLAND EXPENSE - BREAKDOWN

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$38.99	\$38.93	\$86.58	\$40.66	\$63.82	\$3.64	\$0.00	\$89.20	\$0.00	\$20.58	\$47.84	\$101.33
	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	\$20.06	\$20.16	\$26.93	\$18.83	\$18.19	\$9.09	\$0.00	\$22.00	\$66.67	\$32.93	\$18.90	\$15.67
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	\$41.21	\$37.42	\$74.31	\$41.96	\$25.72	\$2.73	\$0.00	\$47.20	\$600.00	\$6.52	\$33.06	\$25.00
HOTEL/ REST	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
OPTIONAL	Mean	\$157.01	\$193.39	\$112.58	\$198.05	\$189.63	\$58.18	\$0.00	\$101.20	\$333.33	\$331.12	\$171.46	\$73.33
TOUR	Median	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$280.00	\$27.50	\$0.00
GIFT/	Mean	\$142.00	\$164.17	\$233.71	\$168.70	\$342.04	\$11.45	\$500.00	\$192.60	\$0.00	\$184.70	\$150.96	\$100.00
SOUV-SELF	Median	\$0.00	\$0.00	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV-	Mean	\$96.85	\$76.99	\$98.89	\$104.15	\$295.19	\$100.00	\$166.67	\$61.00	\$233.33	\$208.14	\$134.63	\$191.33
F&F AT HOME	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00	\$0.00	\$300.00	\$0.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$28.40	\$31.94	\$38.68	\$36.31	\$73.67	\$1.36	\$0.00	\$31.68	\$46.67	\$12.47	\$42.50	\$20.67
	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
OTHER EXP	Mean	\$339.95	\$324.27	\$481.04	\$347.63	\$554.30	\$366.73	\$116.67	\$695.13	\$200.00	\$280.84	\$557.81	\$330.67
	Median	\$60.00	\$70.00	\$75.00	\$60.00	\$60.00	\$10.00	\$0.00	\$47.50	\$200.00	\$28.00	\$94.00	\$0.00

TOTAL EXPENDITURES - TRACKING



TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,149.68	\$976.50	\$1,270.75	\$1,196.01	\$1,547.13	\$913.95	\$1,077.28	\$943.64	\$1,062.66	\$1,607.24	\$1,366.30	\$940.61
	Median	1124.45	1004.52	1081.30	1159.48	1422.74	765.53	1231.84	893.70	1576.62	1632.98	1256.84	635.00
	Minimum	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
	Maximum	4012.16	4012.16	4012.16	4012.16	3071.05	3880.70	2000.00	3000.00	1611.36	3071.05	3642.10	2980.14

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, and Jan 2010 and Overall Oct 2009 - Jan 2010					
	Oct-09	Nov-09	Dec-09	Jan-10	Combined Oct 2009 - Jan 2010
Independent Variables:	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	2	3
Ease of getting around					5
Safety walking around at night					
Quality of daytime tours	2	2	2		2
Variety of daytime tours	4			3	
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping					
Variety of shopping					4
Price of things on Guam				4	
Quality of hotel accommodations	1	1	1	1	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	43.1%	44.3%
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 January 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks,**
 - **Variety of daytime tours, and**
 - **Price of things on Guam**
- With all four factors the overall r^2 is .431 meaning that **43.1% 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 2010 and Overall Oct 2009 - Jan 2010					
	Oct-09	Nov-09	Dec-09	Jan-10	Combined Oct 2009 - Jan 2010
Independent Variables:	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%	0.8%
NOTE: Only significant variables are ranked.					

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** is driven by three significant factors in the January 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of shopping, and**
 - **Variety of shopping**
- With all three factors the overall r^2 is .059 meaning that **5.9% of per person on island expenditure is accounted for by these three factors.**