



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2010 MARKET SEGMENTATION –

JULY 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 +/- 5.2 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

- **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

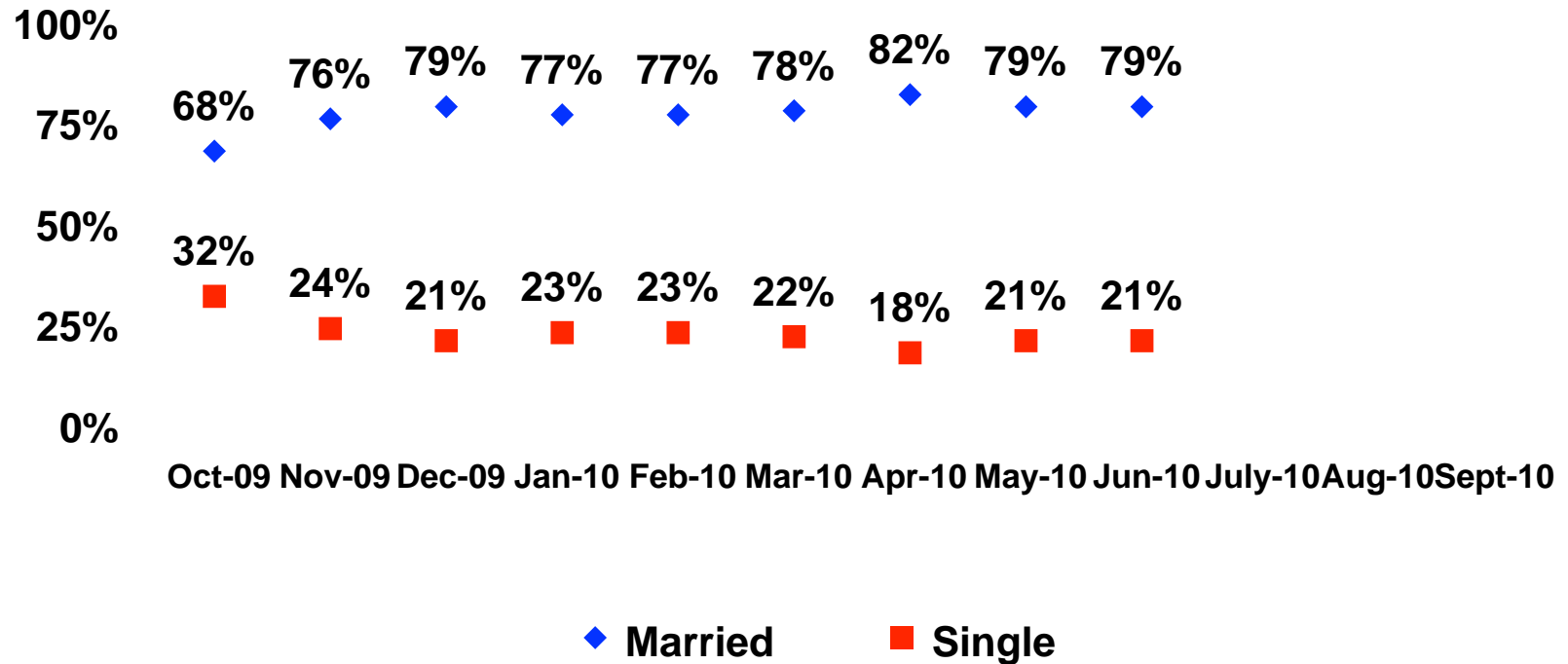
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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%	44%	40%	54%		
Repeaters	25%	21%	19%	21%	25%	17%	16%	18%	19%	16%		
Shoppers	51%	60%	57%	52%	49%	54%	61%	49%	54%	48%		
Seniors	3%	5%	5%	4%	5%	5%	3%	4%	3%	3%		
OL/Salary woman	11%	15%	13%	8%	9%	11%	11%	13%	13%	15%		
Group Travelers	5%	3%	6%	3%	1%	3%	3%	4%	4%	1%		
Students	3%	2%	1%	1%	1%	2%	1%	1%	2%	1%		
Golfers	7%	5%	4%	7%	7%	6%	7%	5%	5%	3%		
Wedding	1%	1%	1%	1%	1%	3%	2%	0%	2%	0%		
Divers	20%	20%	22%	19%	16%	17%	20%	11%	15%	11%		
Honey- mooners	17%	21%	23%	12%	14%	23%	24%	15%	21%	12%		
TOTAL	352	352	353	351	352	352	353	352	352	352		5

SECTION 1 **PROFILE OF RESPONDENTS**

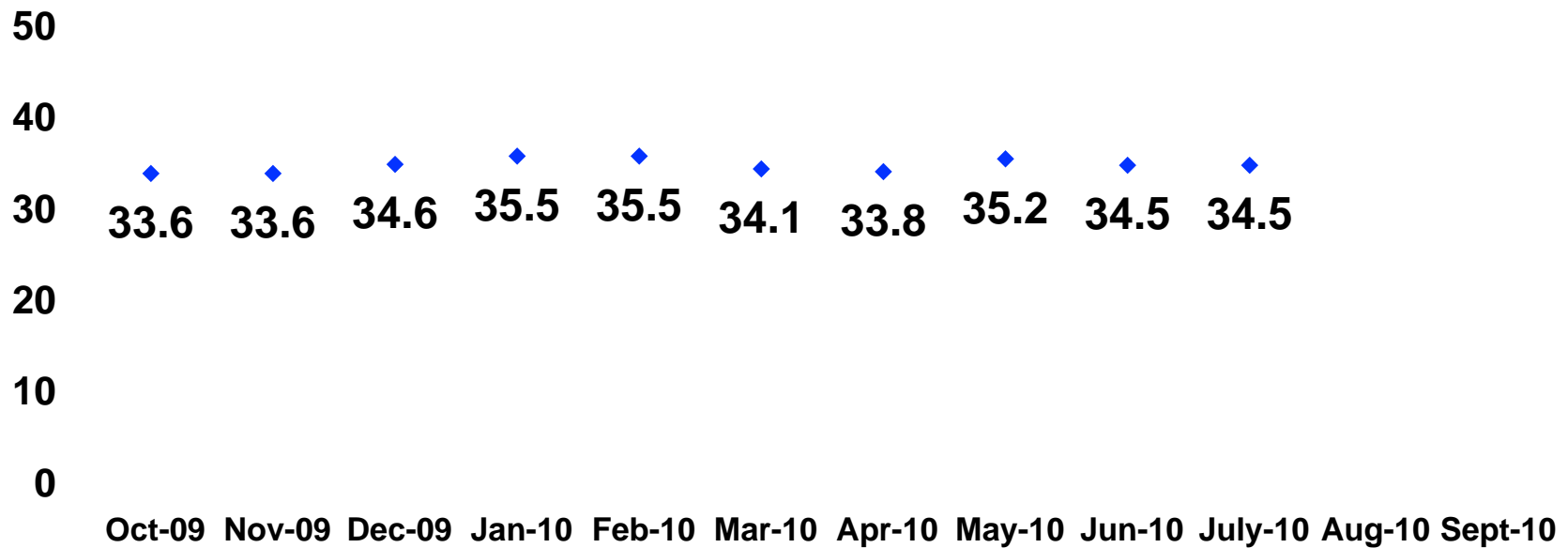
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	279	165	46	135	33	3	2	6	1	42	25	10
		Col %	79%	87%	82%	79%	63%	60%	50%	67%	100%	100%	64%	83%
	Single	Count	73	25	10	35	19	2	2	3			14	2
		Col %	21%	13%	18%	21%	37%	40%	50%	33%			36%	17%
Total	Count		352	190	56	170	52	5	4	9	1	42	39	12

Average Age Tracking



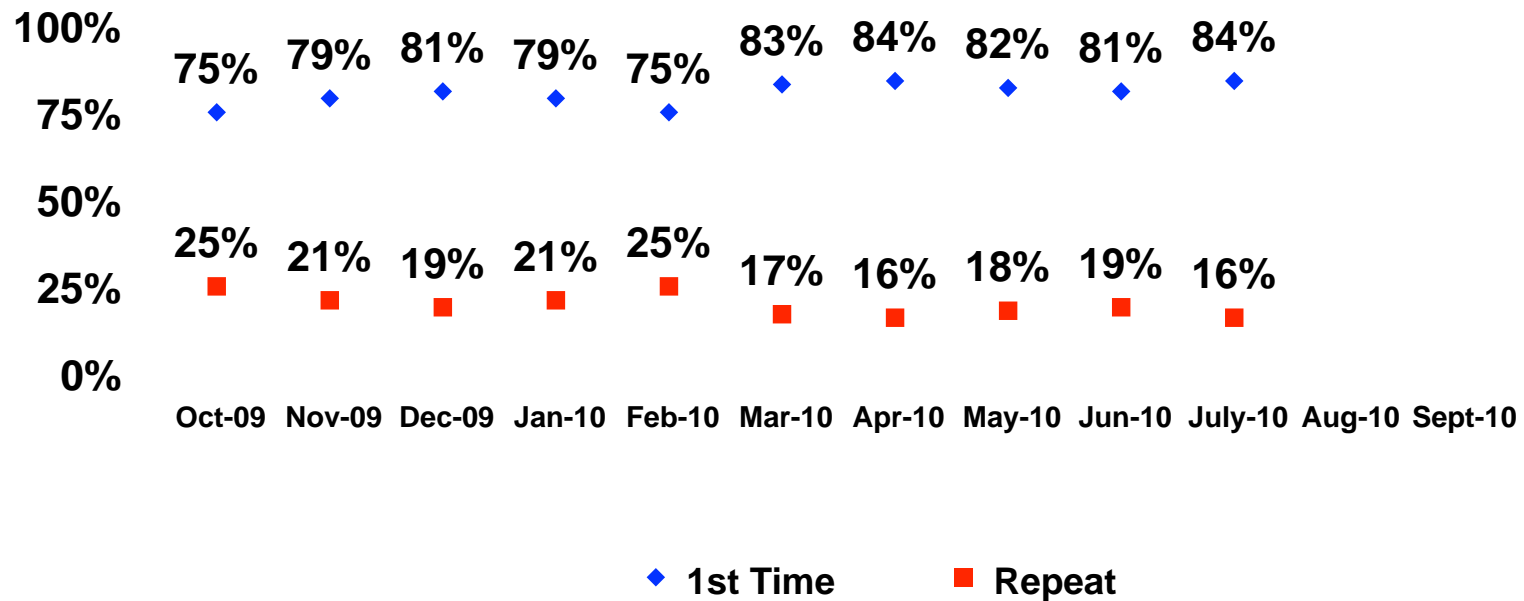
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
D.	18-34	Count	189	73	21	96	40	1	3	6	1	36	24		
		Col %	54%	38%	38%	56%	77%	20%	75%	67%	100%	86%	62%		
	35-54	Count	154	110	35	69	12	4		3		6	15	3	
		Col %	44%	58%	63%	41%	23%	80%		33%		14%	38%	25%	
	55+	Count	9	7		5				1					9
		Col %	3%	4%		3%				25%					75%
Total	Count	352	190	56	170	52	5	4	9	1	42	39	12		
C	Mean	34.5	36.4	36.4	34.3	31.5	35.8	40.8	35.0	26.0	30.6	33.1	58.3		
	Median	34	36	38	34	31	38	32	32	26	30	31	59		

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count	5		1	1	1					2		
		Col %	1%		2%	1%	2%					5%		
	KW12M-KW24M	Count	14	3		6	3				1	5	2	1
		Col %	4%	2%		4%	6%				100%	12%	5%	8%
	KW24M-KW36M	Count	58	22	8	35	13	1	1	2		8	6	1
		Col %	17%	12%	14%	21%	25%	20%	25%	22%		20%	16%	8%
	KW36M-KW48M	Count	56	27	4	19	10	1		3		9	8	1
		Col %	16%	15%	7%	11%	20%	20%		33%		22%	21%	8%
	KW48M-KW60M	Count	47	23	3	22	5	1		1		7	5	3
		Col %	14%	13%	5%	13%	10%	20%		11%		17%	13%	25%
	KW60M-KW72M	Count	38	23	8	20	6	1				2	3	2
		Col %	11%	13%	14%	12%	12%	20%				5%	8%	17%
	KW72M+	Count	109	75	29	61	13	1		1		5	10	4
		Col %	32%	41%	52%	37%	25%	20%			11%	12%	26%	33%
	No Income	Count	14	8	3	2			3	2		3	4	
		Col %	4%	4%	5%	1%			75%	22%		7%	11%	
Total	Count	341	181	56	166	51	5	4	9	1	41	38	12	

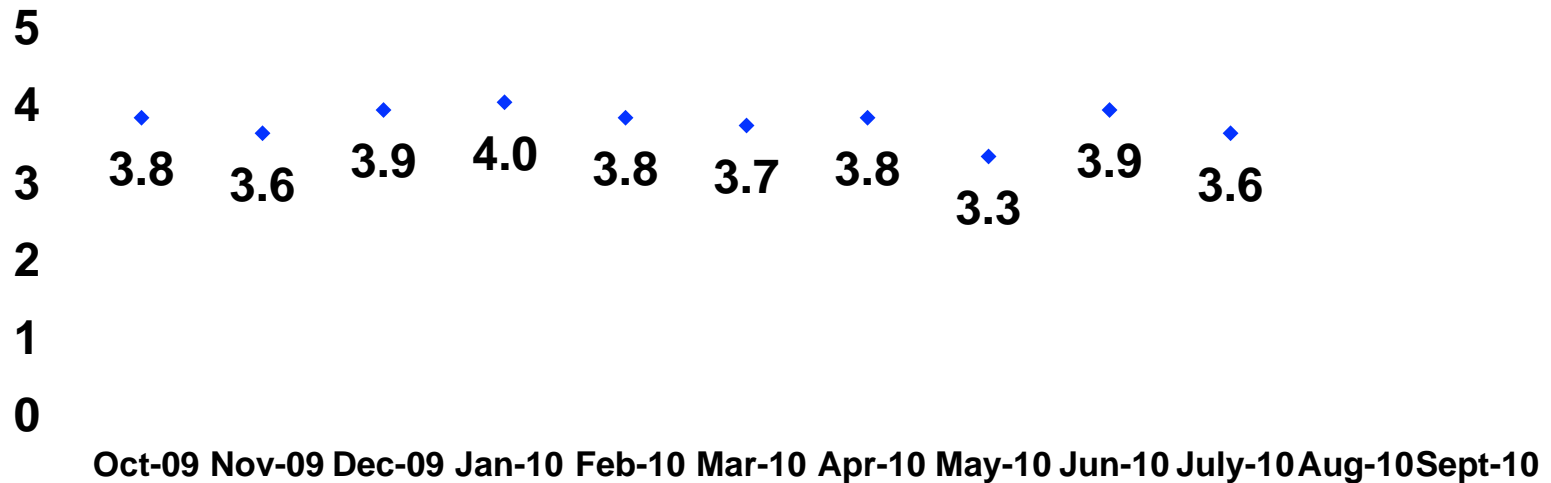
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		296	155		144	47	4	3	8	1	42	34	10
	Col %		84%	82%		85%	90%	80%	75%	89%	100%	100%	87%	83%
No	Count		56	35	56	26	5	1	1	1			5	2
	Col %		16%	18%	100%	15%	10%	20%	25%	11%			13%	17%
Total	Count		352	190	56	170	52	5	4	9	1	42	39	12

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	3.5	3.6	3.4	3.4	3.4	3.5	3.3	3.0	3.3	3.5	3.3
Median	3	3	3	3	3	3	4	3	3	3	3	3
Minimum	2	3	2	2	3	3	3	3	3	2	2	3
Maximum	40	11	11	11	5	4	4	4	3	4	6	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 tours	Count	227	131	28	112	32		2	8	1	34	25	8
		Col %	64%	69%	50%	66%	62%		50%	89%	100%	81%	64%	57%
	Free-time package tours	Count	101	49	16	50	17		2			7	11	4
		Col %	29%	26%	29%	29%	33%		50%			17%	28%	33%
	Individually arranged travel	Count	19	7	11	6	2					1	3	
		Col %	5%	4%	20%	4%	4%					2%	8%	
	Group tour	Count	5	3	1	2	1	5			1			
		Col %	1%	2%	2%	1%	2%	100%			11%			
Total	Count		352	190	56	170	52	5	4	9	1	42	39	12

Travel Motivation Segmentation

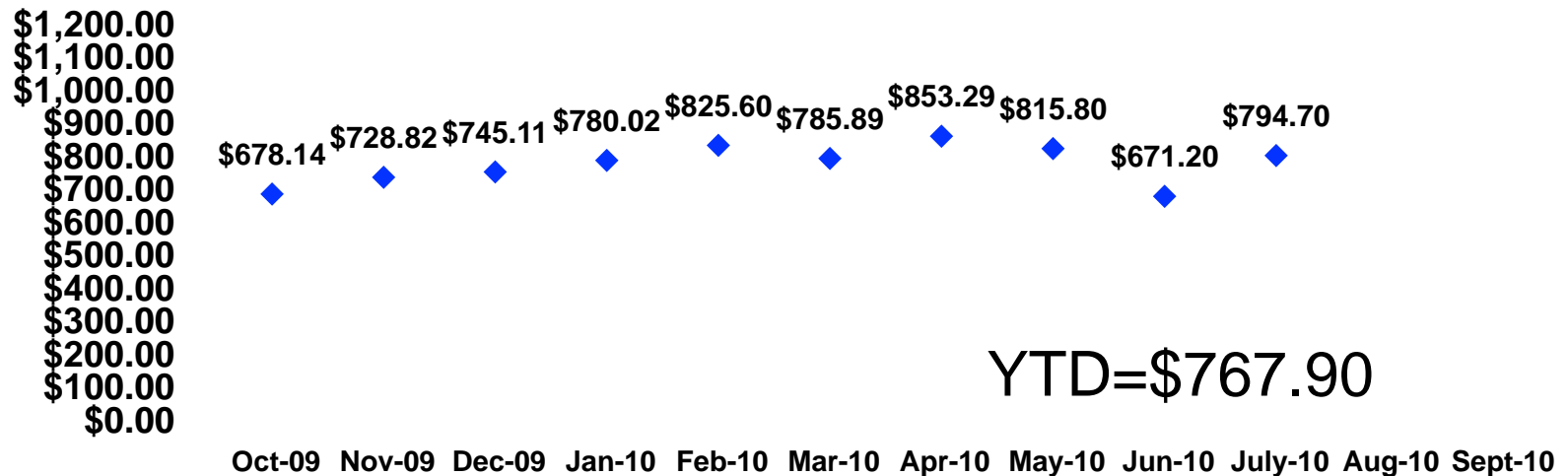
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Just to relax	61%	64%	50%	64%	60%	40%	25%	67%	100%	40%	51%	50%
Beautiful seas, beaches, tropical climate	45%	48%	36%	52%	42%	40%	25%	33%		26%	56%	42%
Short travel time	30%	36%	34%	31%	29%	20%	25%	11%		21%	31%	33%
It is a safe place to spend a vacation	29%	34%	23%	31%	29%	20%	25%	11%		12%	26%	58%
Recommendation of friend, relative, travel agency	17%	18%	2%	18%	19%		50%	11%		12%	21%	33%
Shopping	15%	15%	20%	20%	15%					7%	23%	8%
Water sports	13%	12%	16%	14%	8%			11%	100%	7%	23%	8%
Honeymoon	12%	1%		11%	13%			11%		100%	15%	
A previous visit	8%	11%	52%	9%		20%	25%	11%			3%	
Pleasure	10%	9%	20%	8%	8%		25%	22%		5%	8%	33%
Price of the tour package	8%	6%	13%	8%	4%					5%	5%	17%
Other	2%	4%	7%	4%								8%
Career certification or testing	3%	1%	13%		4%							8%
My company sponsored me	2%	2%		3%	6%	40%		11%			3%	
Organized Sporting Activity	2%	2%	2%	2%	2%			11%			8%	
SCUBA diving	2%	2%	2%	2%	2%					2%	8%	
Company or Business trip	1%	2%	7%	1%	2%						5%	
To golf	2%	1%	2%	1%				11%		7%		
Promotional materials from GVB	1%	2%	2%	1%			25%					
To visit friends or relatives	1%	2%	4%	1%								8%
Convention, Conference, Trade show	0%	1%		1%							3%	
To get married or Attend wedding	0%			1%					100%			
Total Cases	352	190	56	170	52	5	4	9	1	42	39	12

Information Sources Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	85%	84%	73%	86%	87%	40%	50%	67%	100%	81%	85%	67%
	Travel agent brochure	41%	40%	30%	35%	38%	60%	25%	11%		52%	38%	33%
	Friend or relative	22%	21%	7%	23%	13%	40%	25%	33%		26%	31%	25%
	I have been to Guam before	15%	17%	96%	14%	8%	20%	25%	11%			13%	17%
	Company travel department	13%	12%	4%	16%	25%	40%		22%	100%	14%	13%	8%
	Travel guide book at bookstores	10%	11%	7%	12%	12%			11%		7%	15%	8%
	TV	9%	8%	7%	10%	10%		50%	33%		10%	10%	17%
	Guam promo activities	7%	9%	9%	9%	10%		25%	11%		2%	8%	8%
	Newspaper	3%	4%	5%	4%	2%	20%				2%	5%	17%
	Magazine	3%	4%	2%	3%	2%						5%	
Total	Cases	352	190	56	170	52	5	4	9	1	42	39	12

SECTION 3
EXPENDITURES

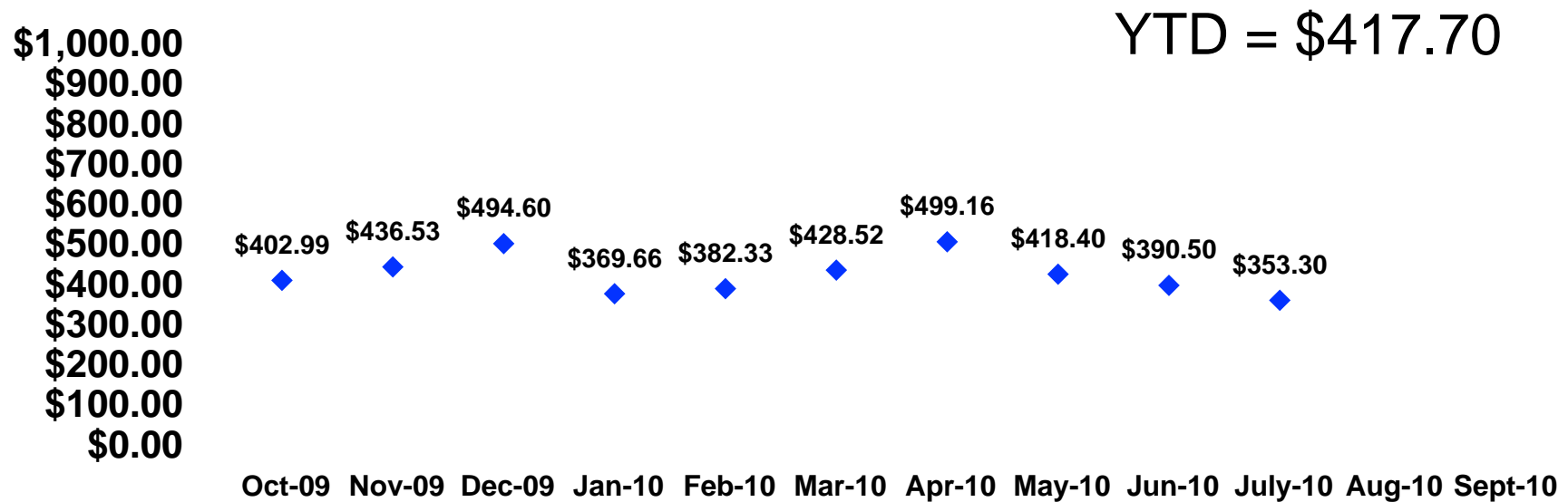
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$794.71	\$740.39	\$762.07	\$812.23	\$822.01	\$437.53	\$732.78	\$608.75	\$0.00	\$1,095.16	\$758.48	\$665.46
	Median	\$827	\$822	\$822	\$842	\$880	\$30	\$746	\$808	\$0	\$1,109	\$822	\$719
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$616.36	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,229.73	\$2,629.81	\$1,917.57	\$2,465.44	\$2,465.44	\$1,196.56	\$821.81	\$1,060.14	\$0.00	\$3,229.73	\$1,783.34	\$1,384.76

On-Island Expenditures Tracking



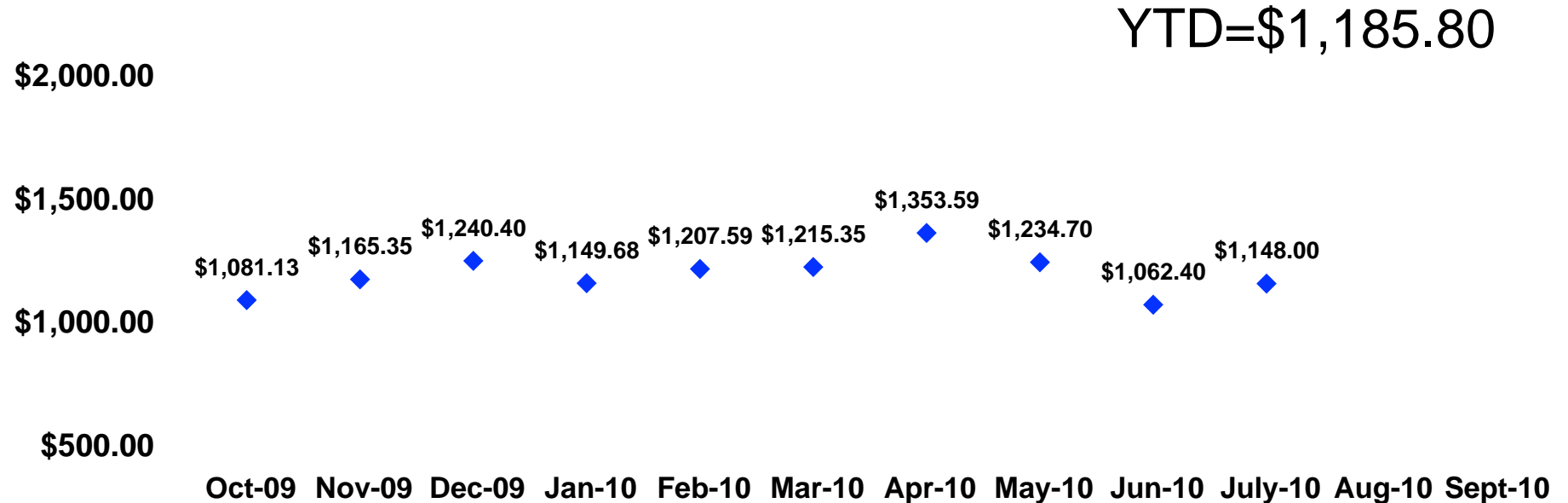
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$353.26	\$264.41	\$331.64	\$383.53	\$397.41	\$405.00	\$197.08	\$334.76	\$750.00	\$545.74	\$296.71	\$170.44
	Median	\$201	\$158	\$245	\$229	\$203	\$375	\$215	\$213	\$750	\$470	\$198	\$117
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$58.33	\$16.50	\$750.00	\$0.00	\$0.00	\$0.00
	Maximum	\$3,500.00	\$1,550.00	\$2,000.00	\$1,795.00	\$2,000.00	\$900.00	\$300.00	\$1,000.00	\$750.00	\$1,795.00	\$1,500.00	\$540.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$47.37	\$48.93	\$76.91	\$45.66	\$89.63	\$44.00	\$0.00	\$58.44	\$0.00	\$52.48	\$17.23	\$13.50
	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	\$24.36	\$23.68	\$16.61	\$22.88	\$28.17	\$21.00	\$0.00	\$23.33	\$0.00	\$33.57	\$26.69	\$16.67
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$41.60	\$38.32	\$54.89	\$55.10	\$61.15	\$4.00	\$50.00	\$2.22	\$0.00	\$23.21	\$22.31	\$45.67
	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
OPTIONAL TOUR	Mean	\$115.38	\$138.68	\$57.00	\$156.89	\$87.31	\$156.00	\$0.00	\$217.78	\$0.00	\$111.67	\$173.13	\$181.67
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$213.06	\$251.74	\$238.79	\$284.50	\$204.27	\$612.40	\$50.00	\$280.78	\$0.00	\$207.26	\$188.90	\$141.67
	Median	\$0.00	\$0.00	\$0.00	\$27.50	\$20.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/SOUV- F&F AT HOME	Mean	\$107.29	\$100.24	\$118.07	\$146.63	\$80.81	\$78.40	\$0.00	\$5.56	\$1,500.00	\$228.19	\$126.38	\$62.50
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$92.00	\$0.00	\$0.00	\$1,500.00	\$42.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$20.80	\$20.53	\$34.91	\$25.02	\$20.27	\$30.00	\$0.00	\$67	\$0.00	\$16.21	\$16.15	\$9.50
	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	\$306.07	\$340.36	\$210.79	\$245.88	\$150.60	\$189.20	\$322.50	\$151.11	\$0.00	\$364.71	\$227.62	\$92.17
	Median	\$60.00	\$70.00	\$54.00	\$60.00	\$60.00	\$150.00	\$320.00	\$60.00	\$0.00	\$125.00	\$0.00	\$15.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP Mean	\$1,147.97	\$1,004.81	\$1,093.71	\$1,195.76	\$1,219.42	\$842.53	\$929.87	\$943.51	\$750.00	\$1,640.90	\$1,055.19	\$835.90
Median	1090.61	994.38	1065.46	1128.91	1136.18	900.00	866.41	1000.00	750.00	1574.27	1076.64	863.00
Minimum	.00	.00	.00	.00	.00	100.00	864.85	213.00	750.00	.00	.00	.00
Maximum	4938.17	3301.08	2986.18	3676.95	3676.95	1346.56	1121.81	1402.27	750.00	3676.95	2783.34	1924.76

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.

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Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2009, Jan, Feb, Mar, Apr, May, June, July 2010 and Overall Oct 2009 - July 2010

	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Combined Oct 2009 - July 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	2	2	2	4	3	2	3	3
Ease of getting around							6				5
Safety walking around at night									3		
Quality of daytime tours	2	2	2		3	3	1	2			2
Variety of daytime tours	4			3					4	2	6
Quality of nighttime tours											
Variety of nighttime tours											
Quality of shopping					4		5	4			
Variety of shopping							2				4
Price of things on Guam				4							
Quality of hotel accommodations	1	1	1	1	1	1	3	1	1	1	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	43.1%	53.2%	52.0%	55.9%	39.6%	47.9%	42.5%	46.9%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by three significant factors in the July 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Variety of day time tours, and**
 - **Cleanliness of beaches and parks.**
- With all three factors the overall r^2 is .425 meaning that **42.5% of overall satisfaction is accounted for by these three factors.**

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Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009, and Jan, Feb, Mar, Apr, May, June, July 2010 and Overall Oct 2009 - July 2010

	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Apr-10	May-10	Jun-10	Jul-10	Combined Oct 2009 - June 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks								1			
Ease of getting around											
Safety walking around at night											
Quality of daytime tours			1					3			1
Variety of daytime tours											
Quality of nighttime tours								4			
Variety of nighttime tours											
Quality of shopping				2				2			2
Variety of shopping				3		1			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%	8.3%	1.0%	0.0%	0.4%

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 July 2010 period.**