



GUAM VISITORS BUREAU
Korean Visitor Tracker Exit Profile
FY2010 MARKET SEGMENTATION –
MARCH 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

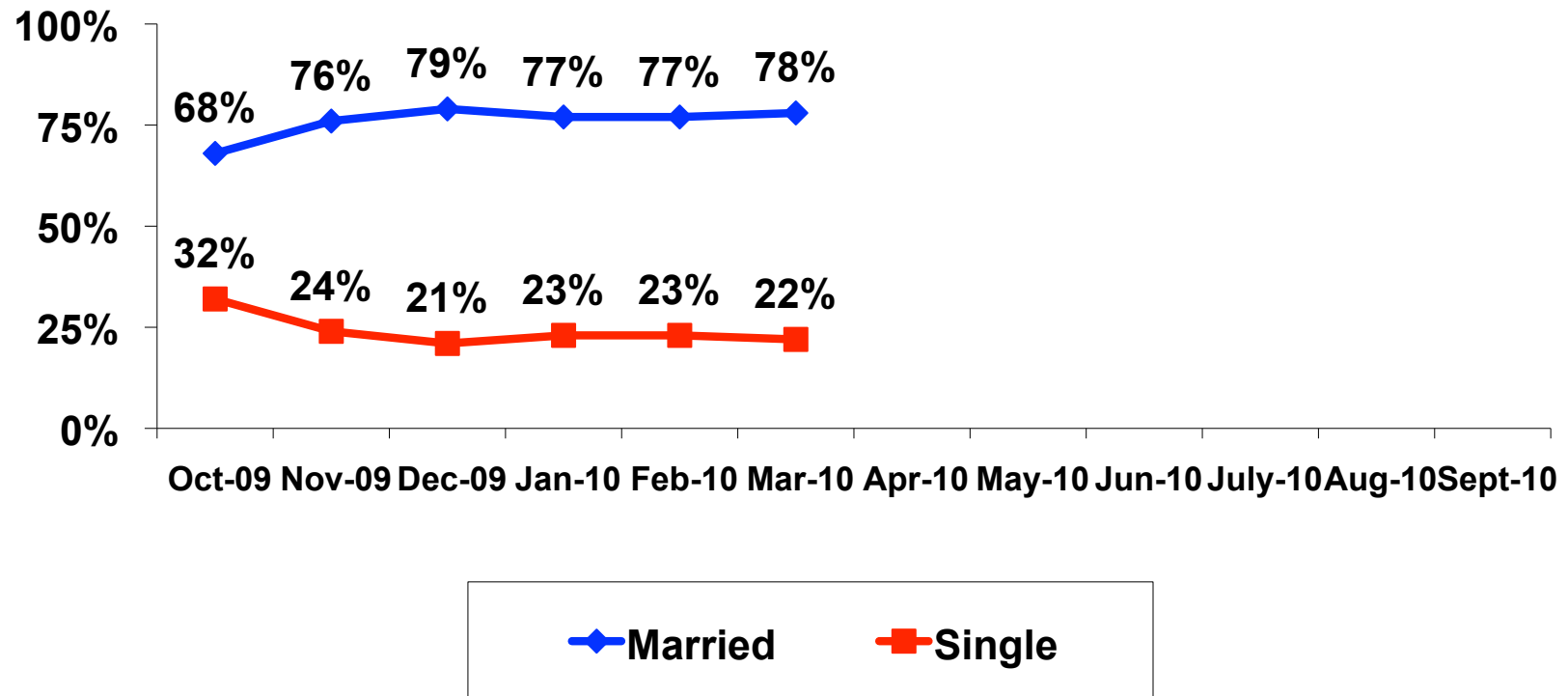
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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%	34%						
Repeaters	25%	21%	19%	21%	25%	17%						
Shoppers	51%	60%	57%	52%	49%	54%						
Seniors	3%	5%	5%	4%	5%	5%						
OL/Salary woman	11%	15%	13%	8%	9%	11%						
Group Travelers	5%	3%	6%	3%	1%	3%						
Students	3%	2%	1%	1%	1%	2%						
Golfers	7%	5%	4%	7%	7%	6%						
Wedding	1%	1%	1%	1%	1%	3%						
Divers	20%	20%	22%	19%	16%	17%						
Honey-mooner	17%	21%	23%	12%	14%	23%						
TOTAL	352	352	353	351	352	352						5

SECTION 1 **PROFILE OF RESPONDENTS**

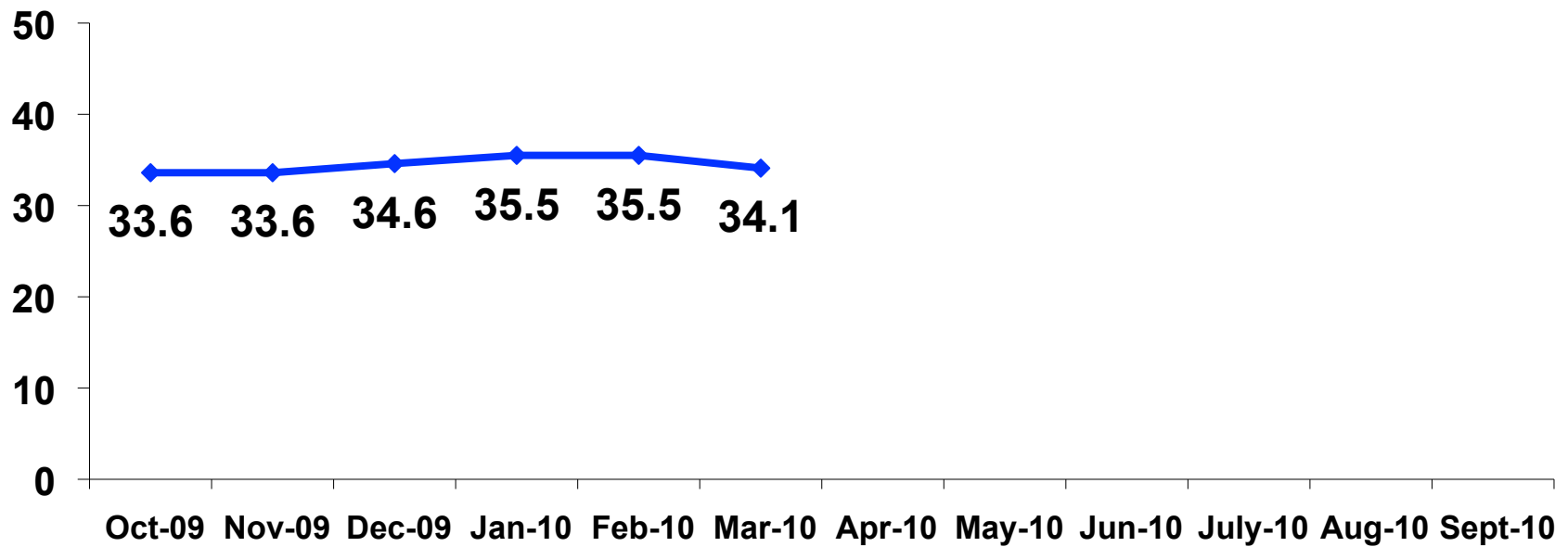
Marital Status - Tracking



Marital Status - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	275	96	46	156	25	8	1	17	7	78	42	17
		Col %	78%	81%	77%	83%	68%	73%	14%	77%	64%	98%	72%	100%
	Single	Count	77	23	14	33	12	3	6	5	4	2	16	
		Col %	22%	19%	23%	17%	32%	27%	86%	23%	36%	3%	28%	
Total	Count		352	119	60	189	37	11	7	22	11	80	58	17

Average Age - Tracking



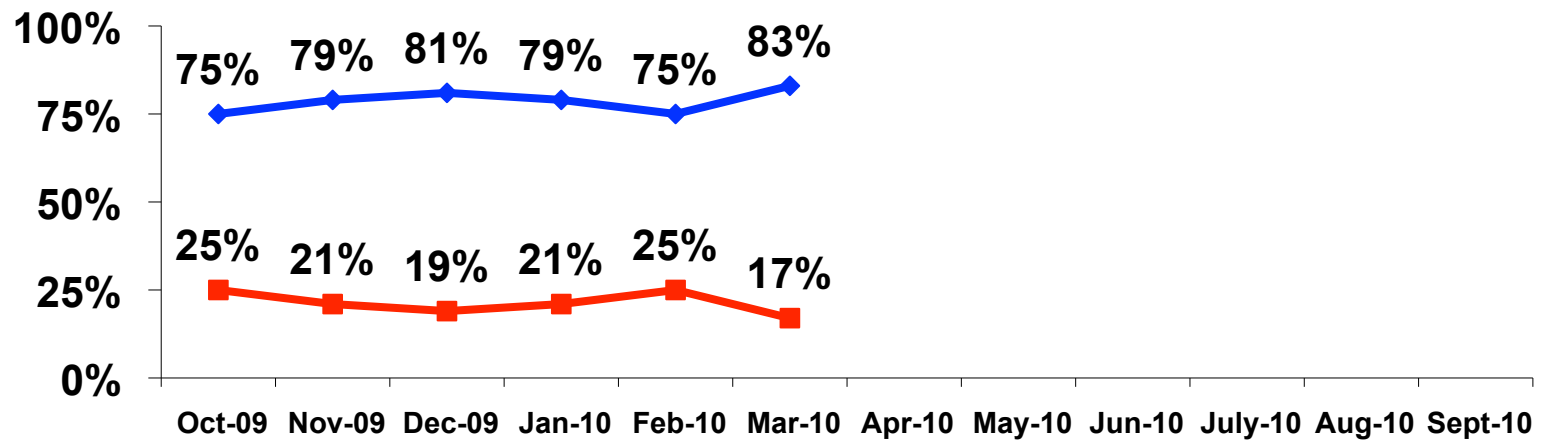
Age - Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	211	46	23	118	29	7	5	9	7	74	38
		Col %	60%	39%	38%	62%	78%	64%	71%	41%	64%	93%	66%
	35-54	Count	129	68	32	63	8	4	1	11	3	6	19
		Col %	37%	57%	53%	33%	22%	36%	14%	50%	27%	8%	33%
	55+	Count	12	5	5	8			1	2	1	1	12
		Col %	3%	4%	8%	4%			14%	9%	9%	2%	71%
Total	Count	352	119	60	189	37	11	7	22	11	80	58	17
C	Mean	34.1	36.1	38.0	34.1	30.7	33.1	33.1	38.0	37.4	29.7	33.5	58.9
	Median	33	36	36	33	29	31	28	37	34	29	32	58

Income - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 31	Less than KW12 million	Count	10	4	1	6					2	3	3	1
		Col %	3%	4%	2%	3%					25%	4%	6%	6%
	KW12M-KW24M	Count	21	3		10	4			1	1	6	2	
		Col %	6%	3%		6%	11%			5%	13%	8%	4%	
	KW24M-KW36M	Count	87	15	6	51	16	3	2	4	3	33	15	3
		Col %	26%	14%	11%	29%	44%	38%	50%	20%	38%	42%	28%	18%
	KW36M-KW48M	Count	51	18	5	29	3		1	1		13	10	2
		Col %	15%	16%	9%	16%	8%		25%	5%		17%	19%	12%
	KW48M-KW60M	Count	54	21	6	30	4	2	1	2	1	14	4	4
		Col %	16%	19%	11%	17%	11%	25%	25%	10%	13%	18%	7%	24%
	KW60M-KW72M	Count	30	14	9	13	5	2		4	1	3	3	2
		Col %	9%	13%	17%	7%	14%	25%		20%	13%	4%	6%	12%
	KW72M+	Count	72	34	25	35	4	1		8		4	15	5
		Col %	22%	31%	46%	20%	11%	13%		40%		5%	28%	29%
	No Income	Count	6	2	2	3						2	2	
		Col %	2%	2%	4%	2%						3%	4%	
Total	Count	331	111	54	177	36	8	4	20	8	78	54	17	

Prior Trips To Guam - Tracking

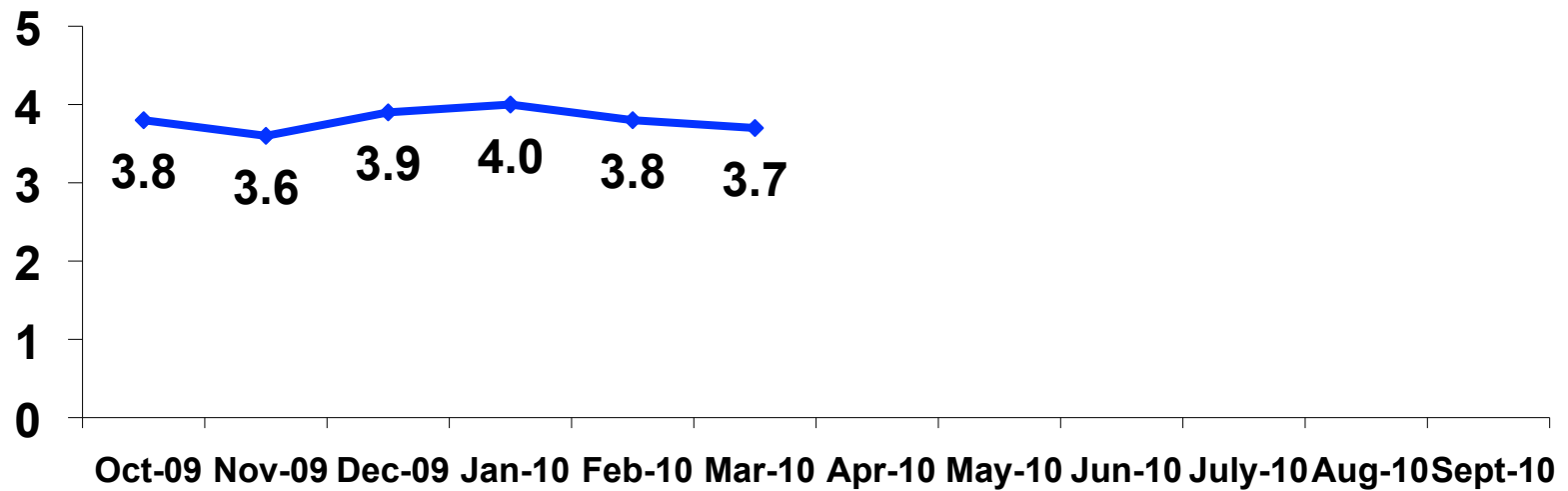


◆ 1st Time ■ Repeat

Prior Trips To Guam - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	292	95		166	30	10	6	16	7	75	53	10
		Col %	83%	80%		88%	81%	91%	86%	73%	64%	94%	91%	59%
	No	Count	60	24	60	23	7	1	1	6	4	5	5	7
		Col %	17%	20%	100%	12%	19%	9%	14%	27%	36%	6%	9%	41%
Total		Count	352	119	60	189	37	11	7	22	11	80	58	17

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	3.7	3.6	4.3	3.9	3.2	3.3	4.3	4.9	3.3	3.4	4.8	4.1
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	3	1	3	3	3	3	2	3	2	3	2
Maximum	56	15	19	56	5	4	11	19	4	5	56	11

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 Col %	216 61%	76 64%	21 35%	129 68%	26 70%	2 29%	15 68%	2 18%	65 81%	45 78%	6 35%	
	Free-time package tours	Count Col %	90 26%	32 27%	26 43%	43 23%	5 14%	3 43%		7 64%	12 15%	6 10%	7 41%	
	Individually arranged travel	Count Col %	31 9%	8 7%	10 17%	12 6%	2 5%	2 29%	4 18%		3 4%	4 7%	4 24%	
	Group tour	Count Col %	11 3%		1 2%	4 2%	4 11%	11 100%	3 14%			3 5%		
	Other	Count Col %	4 1%	3 3%	2 3%	1 1%				2 18%				
Total	Count		352	119	60	189	37	11	7	22	11	80	58	17

Travel Motivation - Segmentation

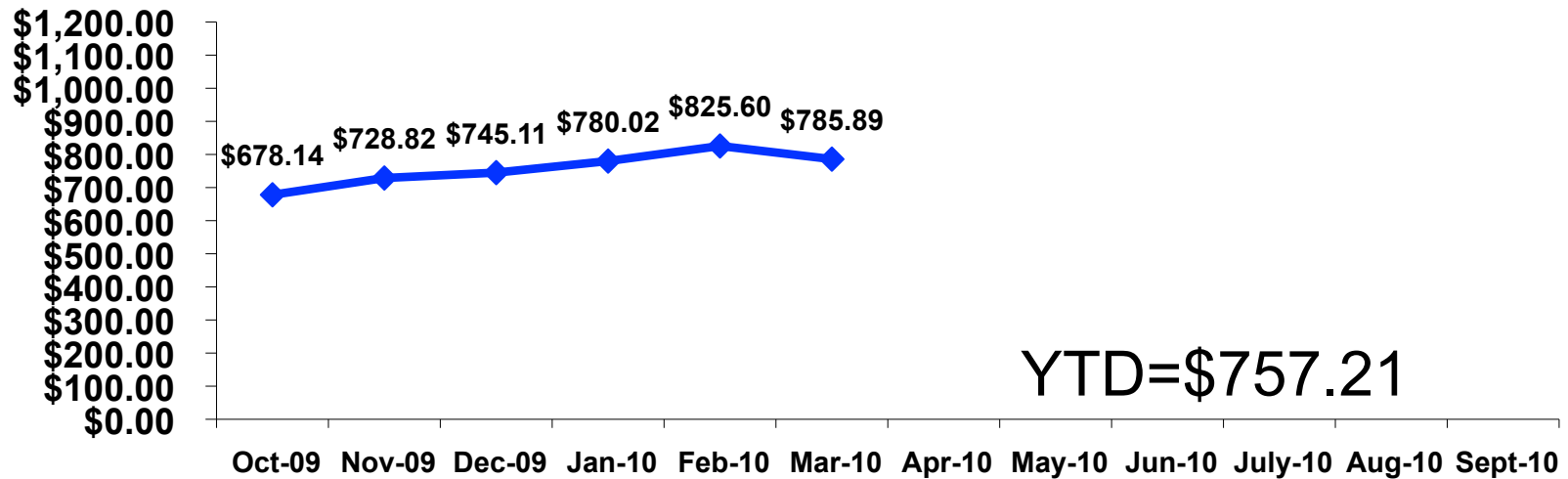
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Just to relax	50%	75%	50%	55%	35%	9%	43%	36%	18%	39%	53%	35%
Beautiful seas, beaches, tropical climate	38%	47%	42%	42%	30%		29%	36%	18%	25%	38%	35%
Honeymoon	23%	1%	8%	30%	22%			9%	18%	100%	24%	
Short travel time	26%	23%	23%	24%	41%			14%		28%	17%	29%
It is a safe place to spend a vacation	20%	27%	27%	22%	19%			18%	9%	16%	16%	41%
Recommendation of friend, relative, travel agency	15%	14%	12%	15%	8%				18%	19%	22%	12%
Shopping	12%	18%	23%	14%	8%		14%	5%		6%	2%	12%
A previous visit	7%	11%	43%	6%	14%			9%		3%	7%	12%
Water sports	9%	14%	8%	10%	3%			5%		4%	16%	12%
My company sponsored me	10%	3%	5%	8%	14%	64%		23%		1%	12%	6%
Price of the tour package	6%	6%	8%	7%	8%				9%	6%	5%	12%
Pleasure	6%	6%	7%	4%				5%		3%	5%	29%
To golf	3%	3%	12%	3%	5%	9%		36%			3%	24%
To get married or Attend wedding	3%	4%	7%	4%			14%		100%	3%		6%
Other	4%	8%	3%	4%	3%		14%	5%		3%	7%	
Company or Business trip	5%	1%	7%	3%	11%	45%		9%			3%	6%
SCUBA diving	3%	3%	5%	3%	3%	9%		9%		1%	12%	
To visit friends or relatives	3%	3%	7%	2%				5%			2%	18%
Career certification or testing	3%	1%	5%	1%			29%	5%			3%	
Promotional materials from GVB	2%	3%	2%	2%						1%		
Special promotion	1%	2%	2%	1%	3%							
Convention, Conference, Trade show	1%											6%
Organized Sporting Activity	1%	1%		1%								
Total Cases	352	119	60	189	37	11	7	22	11	80	58	17

Information Sources - Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	81%	89%	77%	83%	86%	82%	71%	82%	91%	83%	76%	76%
Travel agent brochure	49%	45%	42%	55%	46%	55%	43%	55%	55%	64%	57%	47%
Friend or relative	25%	27%	17%	25%	11%	9%		23%	36%	26%	28%	29%
I have been to Guam before	17%	20%	100%	12%	19%	9%	14%	27%	36%	6%	9%	41%
Company travel department	11%	9%	5%	11%	16%	9%			9%	9%	14%	
TV	10%	5%	5%	8%	14%		14%		9%	16%	9%	12%
Guam promo activities	8%	14%	7%	9%	8%	18%		9%		4%	5%	12%
Travel guide book at bookstores	5%	6%	5%	6%	8%			5%		3%	7%	
Magazine	5%	4%	7%	4%		9%	29%	23%		3%	2%	
Newspaper	3%	7%	5%	4%	5%		14%	5%		3%	2%	12%
Pod casts	0%											
Total Cases	351	119	60	189	37	11	7	22	11	80	58	17

SECTION 3 **EXPENDITURES**

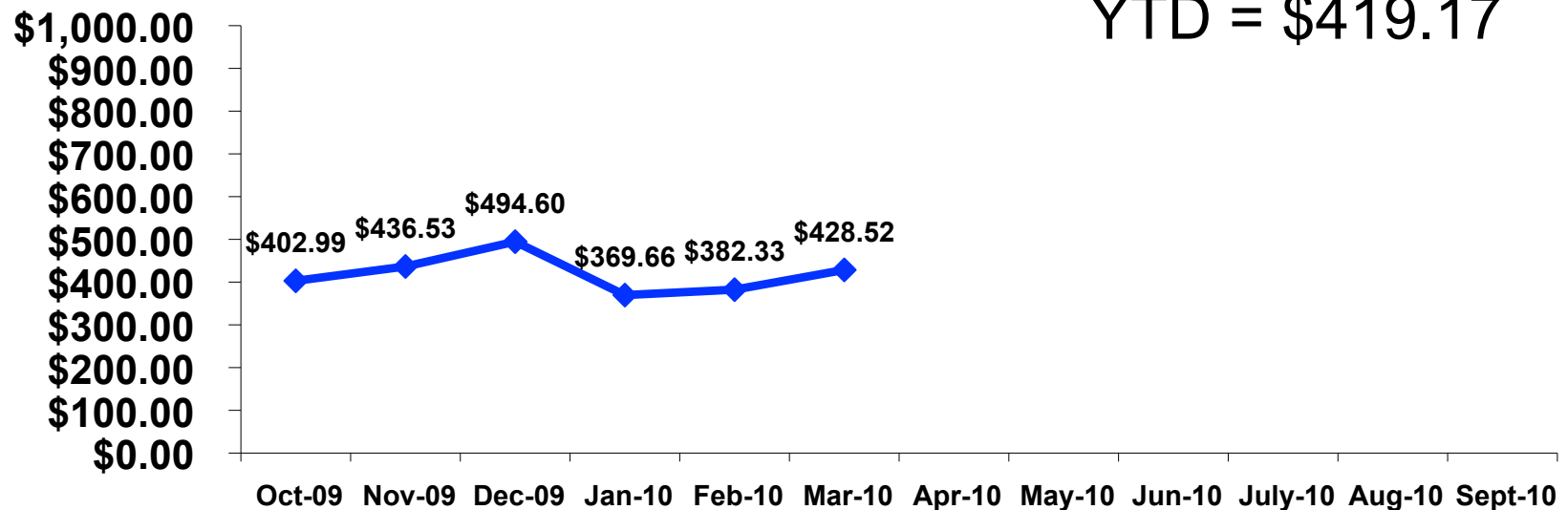
Prepaid Expenditures - Tracking



Prepaid Expenditures Per Person - Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$785.89	\$717.72	\$756.17	\$918.35	\$715.95	\$175.65	\$319.93	\$583.57	\$562.88	\$1,120.87	\$987.54	\$510.28
	Median	\$849	\$776	\$776	\$883	\$743	\$0	\$0	\$0	\$747	\$1,273	\$1,054	\$527
	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	\$4,830.37	\$2,546.92	\$4,830.37	\$4,830.37	\$2,810.39	\$1,053.90	\$878.25	\$4,830.37	\$1,141.72	\$2,810.39	\$4,830.37	\$1,313.86

On-island Expenditures - Tracking



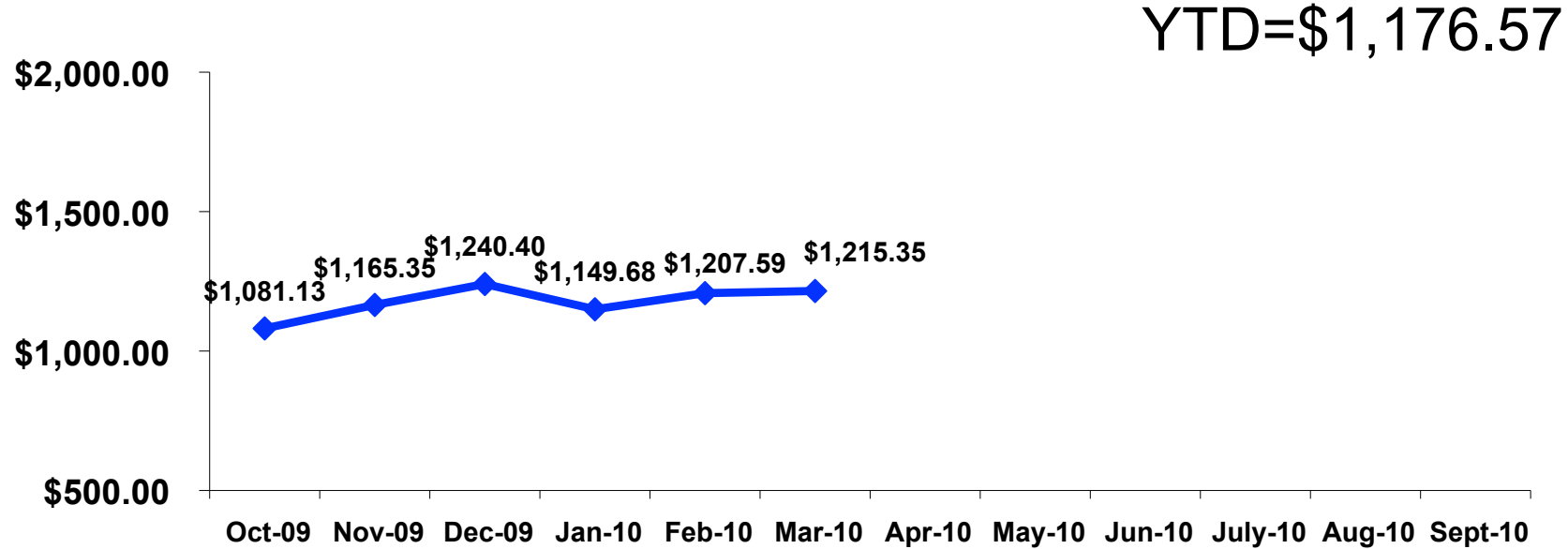
On-island Expenditures Per Person - Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per	Mean	\$428.52	\$268.28	\$499.06	\$478.67	\$378.13	\$132.27	\$171.43	\$840.35	\$322.36	\$547.37	\$451.41	\$859.08
peson	Median	\$250	\$188	\$211	\$300	\$250	\$100	\$0	\$200	\$200	\$350	\$250	\$480
on-island	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
exp	Maximum	\$6,000.00	\$1,500.00	\$6,000.00	\$6,000.00	\$2,000.00	\$500.00	\$800.00	\$6,000.00	\$800.00	\$5,000.00	\$6,000.00	\$5,000.00

On-Island Expense - Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$56.40	\$108.63	\$132.75	\$84.35	\$44.35	\$0.00	\$0.00	\$87.50	\$25.73	\$46.30	\$6.88	\$329.00
	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	\$20.23	\$28.93	\$13.67	\$25.70	\$9.38	\$0.91	\$0.00	\$7.05	\$40.00	\$26.48	\$19.47	\$0.00
	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 HOTEL/ REST	Mean	\$28.32	\$25.29	\$51.67	\$28.40	\$36.19	\$2.73	\$0.00	\$40.91	\$0.00	\$25.54	\$2.90	\$92.35
	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	\$97.61	\$115.25	\$39.00	\$142.91	\$56.32	\$25.00	\$0.00	\$41.36	\$120.00	\$167.00	\$201.64	\$71.76
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$181.88	\$193.60	\$174.33	\$249.64	\$165.46	\$50.91	\$0.00	\$54.09	\$45.64	\$300.04	\$110.00	\$2.94
	Median	\$0.00	\$0.00	\$0.00	\$30.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$123.44	\$112.76	\$81.73	\$158.16	\$109.19	\$66.91	\$0.00	\$11.64	\$222.73	\$230.21	\$84.53	\$79.41
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$16.33	\$23.46	\$25.42	\$17.16	\$10.62	\$4.55	\$0.00	\$5.45	\$12.73	\$10.83	\$4.16	\$2.47
	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	\$354.20	\$341.99	\$385.77	\$359.91	\$253.57	\$4.00	\$400.00	\$1,007.27	\$221.00	\$245.76	\$466.69	\$783.59
	Median	\$30.00	\$80.00	\$45.00	\$40.00	\$10.00	\$0.00	\$0.00	\$5.00	\$50.00	\$30.00	\$31.50	\$300.00

Total Expenditures - Tracking



Total Expenditures Per Person – Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP Mean	\$1,215.35	\$987.43	\$1,255.22	\$1,397.02	\$1,101.81	\$307.92	\$491.36	\$1,423.91	\$885.24	\$1,668.23	\$1,438.95	\$1,369.36
Median	1145.25	1008.50	1054.52	1238.73	914.17	171.00	746.51	287.50	880.84	1709.44	1310.75	1205.42
Minimum	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00	.00
Maximum	10830.37	3695.62	10830.37	10830.37	3810.39	1083.90	1014.77	10830.37	1891.72	6449.11	10830.37	5790.42

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.

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2009, Jan, Feb, Mar 2010 and Overall Oct 2009 - Mar 2010							
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Combined Oct 2009 - Mar 2010
Independent Variables:	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	2	2	2	3
Ease of getting around							5
Safety walking around at night							
Quality of daytime tours	2	2	2		3	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			6
Quality of hotel accommodations	1	1	1	1	1	1	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	43.1%	53.2%	52.0%	47.2%

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 March 2010 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches and parks, and**
 - **Quality of daytime tours.**
- With all three factors the overall r^2 is .52 meaning that **52% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009, and Jan, Feb, Mar 2010 and Overall Oct 2009 - Mar 2010							
	Oct-09	Nov-09	Dec-09	Jan-10	Feb-10	Mar-10	Combined Oct 2009 - Mar 2010
Independent Variables:	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%	1.0%	0.3%
NOTE: Only significant variables are ranked.							

Drivers of Per Person On Island Expenditure

- **There was one significant driver of Per Person On-Island Expenditure during the March 2010 period and that was:**
 - **Variety of shopping**
- **Variety of shopping accounted for 1.0% of Per Person On Island Expenditure.**