



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2015 Market Segmentation

AUGUST 2015



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:
 - Family/FITs
 - Golden Miss
 - Group Travelers
 - English Language Tour
 - Honeymooner
 - Wedding
 - Special Interest Trvl
 - Incentive Market
 - 18-35
 - 36-55
 - Traveling with children
 - FITs
 - Seniors
 - Sports competition/spectator
 - To identify the most significant factors affecting overall visitor satisfaction.
 - To identify (for all Korean visitors) the most important determinants of on-island spending

Highlighted Segments Parameters

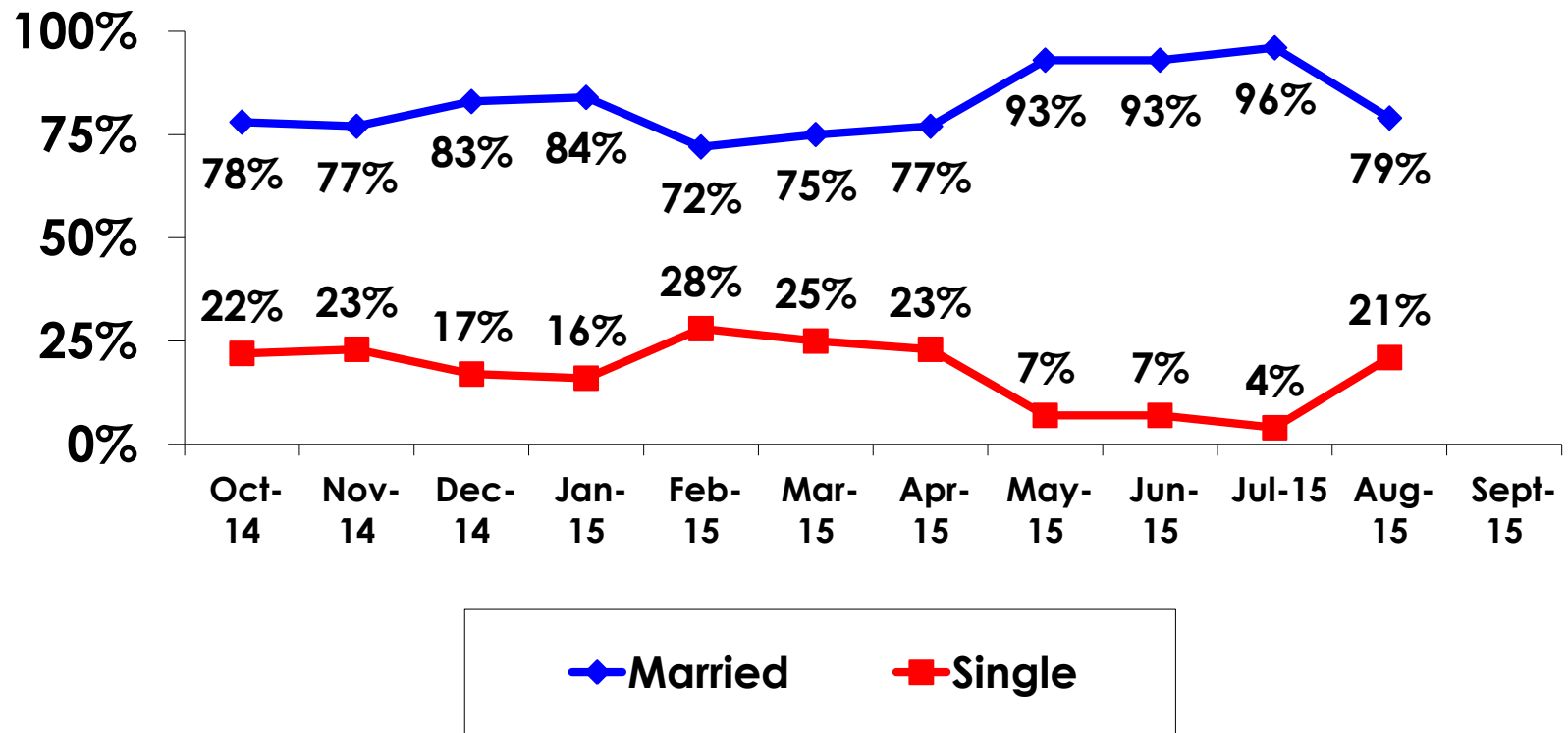
- Family/ FITs – Q.6/ Q.7
- Golden Miss - Female/ QF/ Q.25
- Group Travelers – Q.7
- English Language Tour – Q.18
- Honeymooner – Q.5
- Wedding – Q.5
- Special Interest Trvl – Q.5/ Q.18
- Incentive Market – Q.5/ Q.7
- 18-35 – Q.F
- 36-55 – Q.F
- Traveling with children – Q.6
- FITs – Q.7
- Seniors – Q.F
- Sports comp/spectator – Q.5/Q.19

Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sept 15
Family/ FIT	8%	9%	14%	13%	5%	5%	3%	7%	1%	-	-	
Group	2%	2%	1%	0%	1%	0%	-	-	-	-	-	
Eng Language	1%	0%	0%	1%	-	0%	0%	-	-	-	-	
Honeymoon	9%	17%	15%	15%	5%	4%	9%	2%	6%	11%	14%	
Wedding	1%	1%	1%	1%	1%	1%	1%	1%	1%	17%	24%	
Incentive	6%	7%	9%	1%	3%	2%	1%	-	3%	6%	1%	
18-35	60%	55%	53%	54%	55%	65%	65%	48%	48%	50%	58%	
36-55	39%	43%	45%	46%	43%	32%	33%	51%	51%	50%	42%	
Child	44%	33%	45%	48%	35%	37%	32%	50%	53%	57%	55%	
FIT	20%	14%	17%	18%	17%	14%	10%	7%	1%	-	-	
Golden Miss	4%	5%	5%	3%	5%	8%	5%	6%	9%	7%	5%	
Senior	1%	1%	1%	1%	1%	1%	1%	0%	1%	-	-	
Sport	30%	42%	28%	29%	48%	38%	42%	45%	58%	66%	69%	
TOTAL	351	350	350	353	351	352	350	350	350	352	352	

SECTION 1 **PROFILE OF RESPONDENTS**

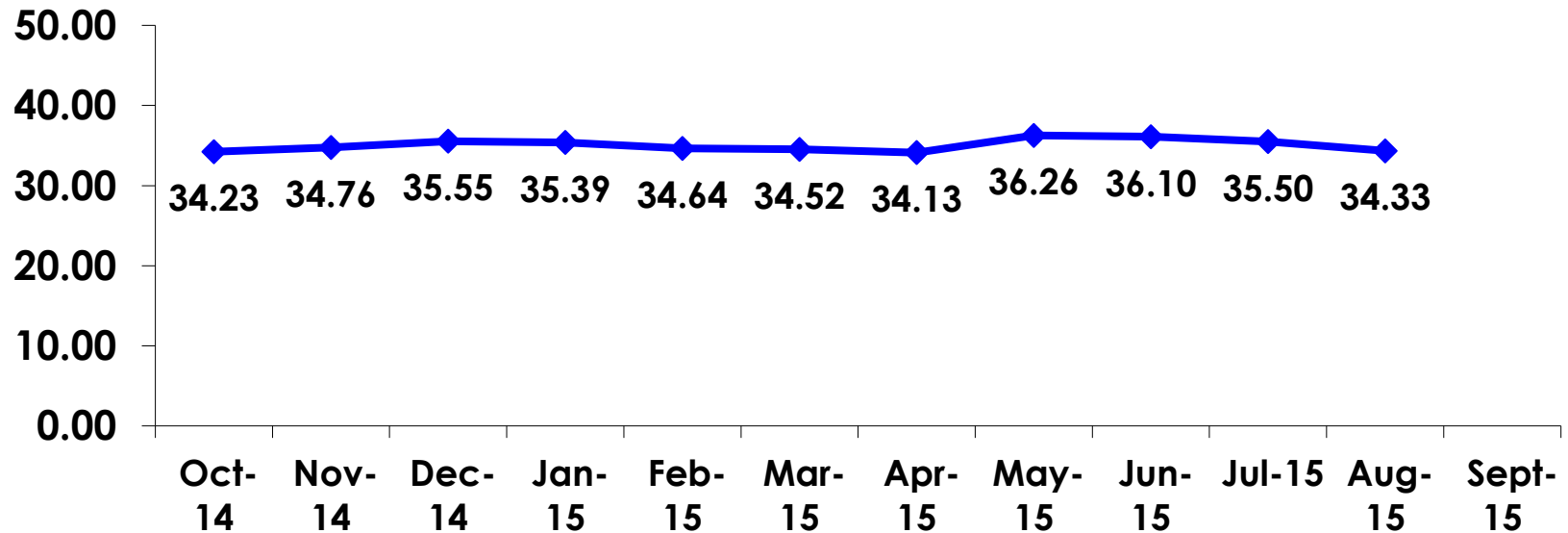
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
			-	N	-	TRVL	-	-	-	MISS	-
QE	Married	Count	277	47	69	2	130	147	195	14	186
		Column N %	79%	96%	81%	67%	63%	100%	100%	78%	77%
	Single	Count	75	2	16	1	75	0	0	4	56
		Column N %	21%	4%	19%	33%	37%	0%	0%	22%	23%
	Total	Count	352	49	85	3	205	147	195	18	242

AVERAGE AGE - TRACKING



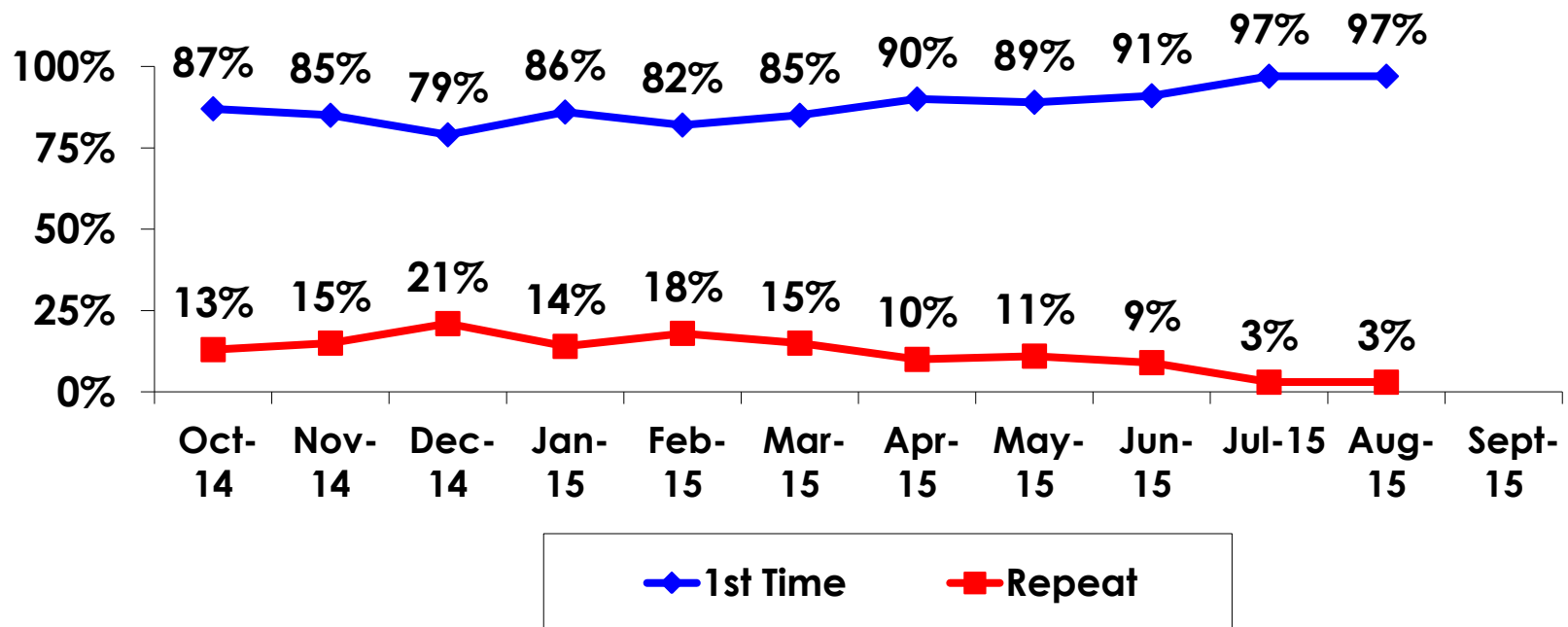
AGE- SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
QF	18-24	Count	2	0	0	0	2	0	0	0	2
		Column N %	1%	0%	0%	0%	1%	0%	0%	0%	1%
	25-34	Count	174	31	41	2	174	0	43	10	122
		Column N %	49%	63%	48%	67%	85%	0%	22%	56%	50%
	35-49	Count	174	18	44	1	29	145	152	8	117
		Column N %	49%	37%	52%	33%	14%	99%	78%	44%	48%
	50+	Count	2	0	0	0	0	2	0	0	1
		Column N %	1%	0%	0%	0%	0%	1%	0%	0%	0%
	Total	Count	352	49	85	3	205	147	195	18	242
QF	Mean		34.33	34.02	34.00	31.67	31.26	38.60	36.55	34.06	34.26
	Median		35	33	35	33	32	38	36	34	34

INCOME - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
			-	N	-	TRVL	-	-	-	MISS	-
Q26	KW24.0M-KW36.0M	Count	6	0	1	1	6	0	0	0	2
		Column N %	2%	0%	1%	33%	4%	0%	0%	0%	1%
	KW36.0M-KW48.0M	Count	74	13	19	1	72	2	20	2	51
		Column N %	26%	33%	28%	33%	46%	2%	13%	11%	27%
	KW48.0M-KW60.0M	Count	157	24	41	1	73	84	109	11	101
		Column N %	56%	62%	61%	33%	46%	68%	69%	61%	53%
	KW60.0M-KW72.0M	Count	41	2	6	0	6	35	29	5	33
		Column N %	15%	5%	9%	0%	4%	28%	18%	28%	17%
	KW72.0M+	Count	2	0	0	0	0	2	1	0	2
		Column N %	1%	0%	0%	0%	0%	2%	1%	0%	1%
Total		Count	280	39	67	3	157	123	159	18	189

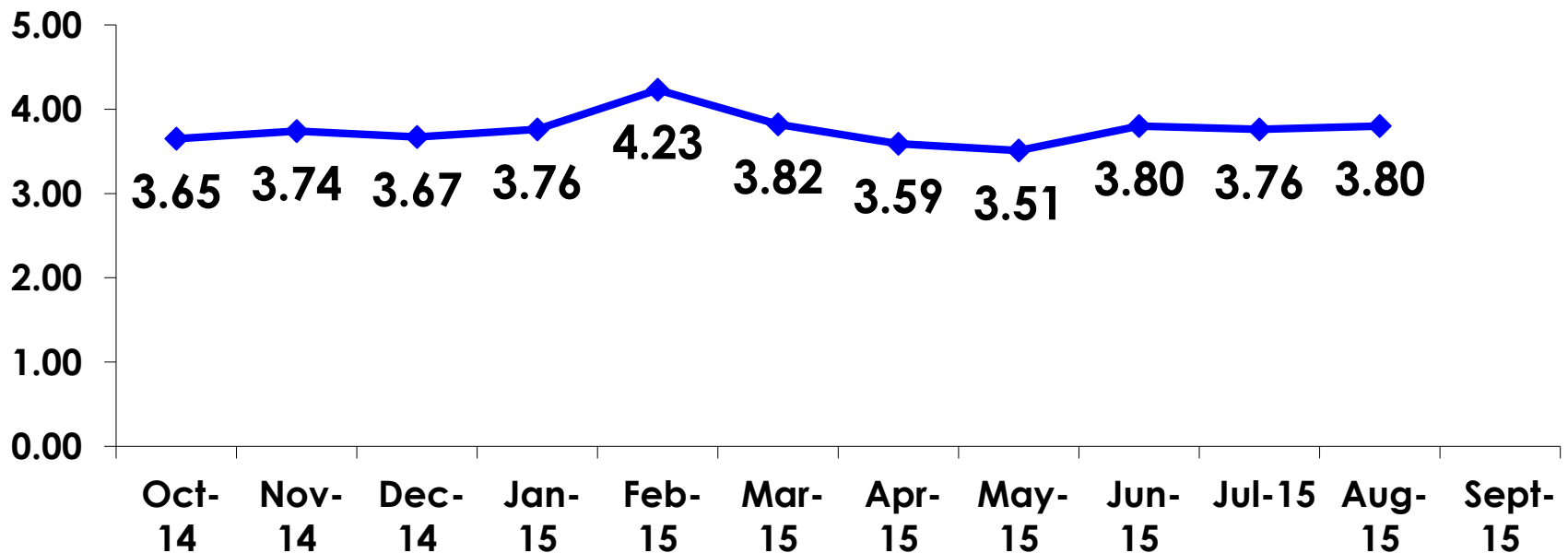
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	340	49	84	3	200	140	183	17	235
		Column N %	97%	100%	99%	100%	98%	95%	94%	94%	97%
	No	Count	12	0	1	0	5	7	12	1	7
		Column N %	3%	0%	1%	0%	2%	5%	6%	6%	3%
	Total	Count	352	49	85	3	205	147	195	18	242

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
Q8	Mean	3.80	3.90	3.81	4.00	3.78	3.82	3.82	3.83	3.83
	Median	4	4	4	4	4	4	4	4	4

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
			-	N	-	TRVL	-	-	-	MISS	-
Q7	Full package tour	Count	319	44	78	3	178	141	189	17	226
		Column N %	91%	90%	94%	100%	88%	97%	98%	94%	94%
	Free-time package tour	Count	30	5	5	0	25	5	3	1	15
		Column N %	9%	10%	6%	0%	12%	3%	2%	6%	6%
	Total	Count	349	49	83	3	203	146	192	18	241

TRAVEL MOTIVATION - SEGMENTATION

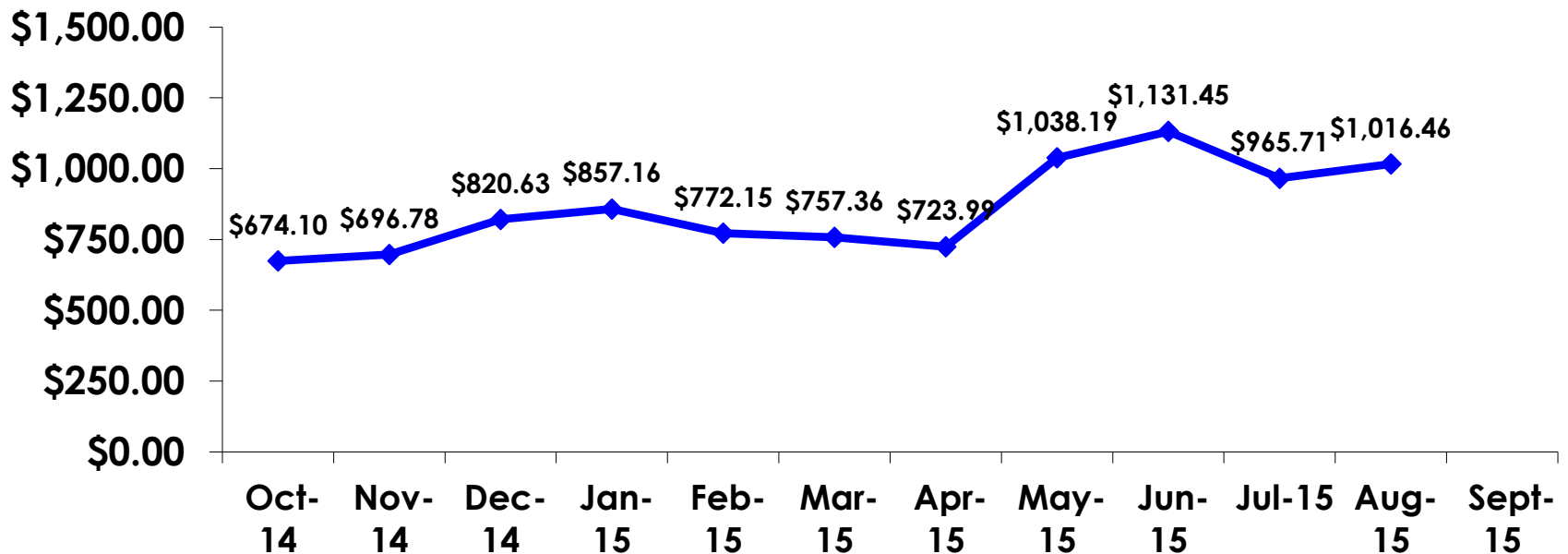
		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
Q5A	Previous trip	1%	0%	0%	0%	1%	2%	3%	0%	1%
	Price	6%	2%	2%	0%	5%	7%	8%	0%	4%
	Visit friends/ Relatives	5%	6%	8%	33%	7%	3%	4%	0%	6%
	Recomm-friend/family/trvl agnt	11%	2%	16%	0%	10%	11%	11%	6%	11%
	Scuba	10%	4%	13%	0%	13%	6%	9%	17%	15%
	Water sports	18%	10%	19%	0%	21%	13%	13%	28%	26%
	Short travel time	28%	14%	25%	0%	27%	29%	32%	17%	29%
	Golf	16%	22%	15%	0%	17%	14%	14%	6%	23%
	Relax	48%	33%	32%	33%	39%	61%	56%	44%	39%
	Company/ Business Trip	10%	12%	16%	33%	12%	7%	9%	17%	9%
	Company Sponsored	1%	2%	1%	100%	1%	1%	1%	0%	0%
	Convention/ Trade/ Conference	7%	16%	11%	0%	8%	5%	4%	22%	7%
	Safe	17%	10%	6%	0%	10%	27%	24%	22%	14%
	Natural beauty	14%	12%	16%	0%	14%	14%	13%	6%	12%
	Shopping	16%	31%	15%	0%	19%	12%	13%	17%	18%
	Career Cert/ Testing	9%	16%	6%	0%	9%	10%	8%	11%	8%
	Married/ Attn wedding	24%	6%	100%	33%	25%	23%	24%	22%	26%
	Honeymoon	14%	100%	4%	33%	18%	9%	8%	17%	16%
	Pleasure	13%	12%	8%	0%	12%	14%	12%	22%	14%
	Organized sports	3%	2%	1%	0%	3%	3%	3%	6%	5%
	Total Count	352	49	85	3	205	147	195	18	242

INFORMATION SOURCES - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
Q1	Internet	91%	98%	100%	100%	93%	87%	87%	100%	92%
	Travel Agent Brochure	55%	49%	42%	67%	51%	60%	58%	56%	56%
	Friend/ Relative	18%	12%	5%	33%	17%	20%	20%	11%	16%
	Travel Guidebook-Bookstore	10%	10%	7%	0%	8%	14%	13%	6%	10%
	Magazine (Consumer)	9%	8%	13%	0%	10%	8%	7%	0%	9%
	Co-Worker/ Company Trvl Dept	9%	2%	11%	33%	5%	14%	11%	6%	9%
	Newspaper	8%	8%	13%	0%	9%	7%	10%	11%	9%
	Theater Ad	8%	10%	11%	0%	10%	5%	5%	11%	10%
	TV	7%	14%	9%	0%	7%	6%	5%	0%	8%
	Consumer Trvl Show	6%	8%	9%	0%	6%	5%	4%	17%	6%
	Travel Trade Show	5%	2%	9%	0%	4%	6%	4%	6%	7%
	Radio	5%	2%	8%	0%	6%	4%	4%	6%	6%
	GVB Office	5%	2%	5%	33%	6%	3%	4%	6%	5%
	Prior Trip	3%	0%	1%	0%	2%	5%	6%	6%	3%
	GVB Promo	2%	2%	4%	0%	3%	1%	2%	6%	2%
	Total Count	352	49	85	3	205	147	195	18	242

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$859.46

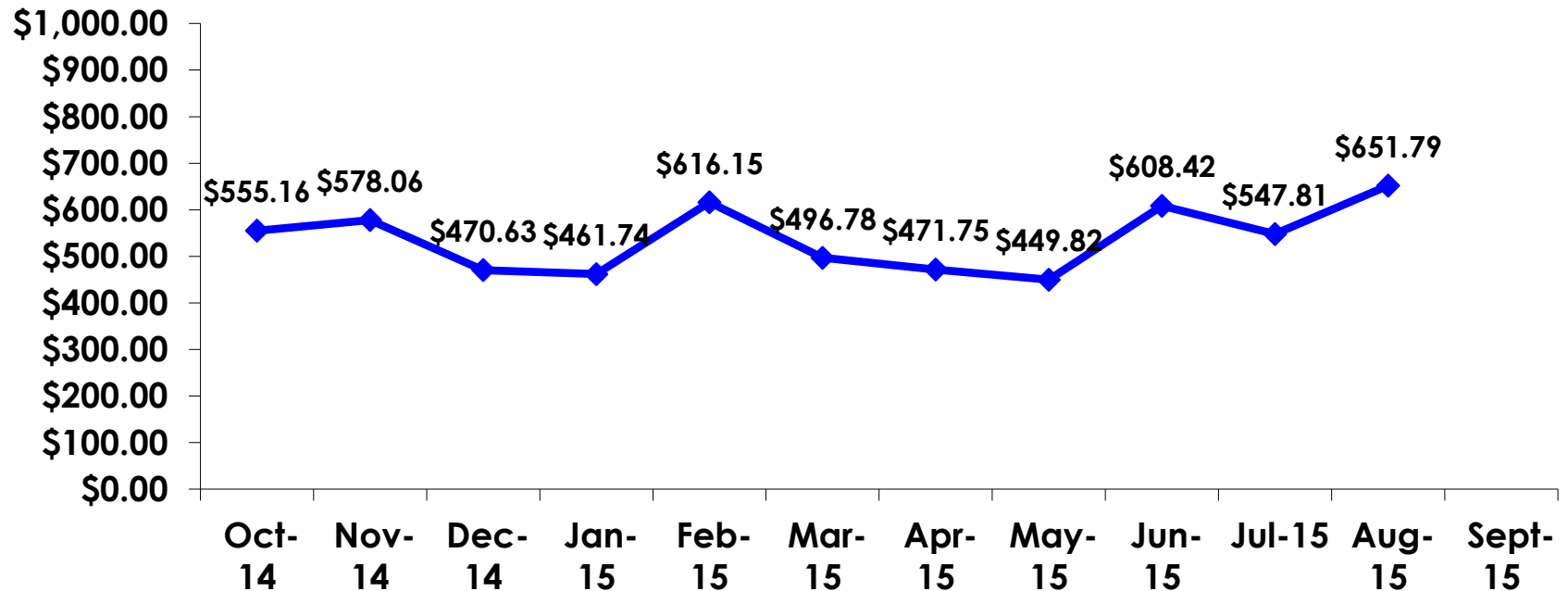
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$1,016.46	\$1,204.36	\$1,041.01	\$943.44	\$1,054.10	\$963.97	\$912.96	\$1,158.91	\$1,044.30
	Median	\$1,159	\$1,317	\$1,190	\$1,088	\$1,190	\$1,088	\$1,062	\$1,232	\$1,190
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,210	\$1,912	\$1,700	\$1,742	\$2,210	\$1,785	\$1,473	\$1,912	\$2,210

PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY/ FIT	GROUP TRVL	ENG LANG LESSON	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$2,651.82	.	.	.	\$1,189.92	\$2,209.85	.	\$2,039.86	\$3,569.76	\$3,144.79	.	\$1,529.90	.	\$3,399.77
	Median	\$2,550	.	.	.	\$1,190	\$2,210	.	\$1,955	\$3,740	\$2,975	.	\$1,530	.	\$3,485
AIR/ HOTEL/ MEAL	Mean	\$3,643.60	.	.	.	\$3,683.78	\$3,845.35	\$3,569.76	\$3,259.16	\$4,162.59	\$4,072.73	.	\$3,649.09	.	\$3,750.37
	Median	\$3,400	.	.	.	\$3,400	\$3,740	\$3,570	\$3,060	\$3,910	\$3,825	.	\$3,400	.	\$3,570
AIR ONLY	Mean	\$722.45	.	.	.	\$509.97	\$793.28	.	\$793.28	\$509.97	.	.	.	.	\$679.95
	Median	\$680	.	.	.	\$510	\$850	.	\$850	\$510	.	.	.	.	\$680
HOTEL ONLY	Mean	\$1,104.93	.	.	.	\$679.95	\$1,246.58	.	\$1,246.58	\$679.95	.	.	.	.	\$1,444.90
	Median	\$765	.	.	.	\$680	\$850	.	\$850	\$680	.	.	.	.	\$1,445
HOTEL & MEAL	Mean	.	.	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- KOREA	Mean	\$86.23	.	.	.	\$87.49	\$91.37	\$42.50	\$84.99	\$87.65	\$84.99	.	\$80.27	.	\$88.49
	Median	\$85	.	.	.	\$85	\$85	\$42	\$85	\$85	\$85	.	\$85	.	\$85
TRANS- GUAM	Mean	\$84.99	.	.	.	.	.	.	\$84.99	.	\$84.99	.	.	.	.
	Median	\$85	.	.	.	.	.	.	\$85	.	\$85	.	.	.	.
OPT TOURS	Mean	\$311.65	.	.	.	\$339.98	.	.	\$311.65	\$311.65	\$311.65	.	\$297.48	.	\$318.73
	Median	\$340	.	.	.	\$340	.	.	\$340	\$340	\$340	.	\$297	.	\$340
OTHER	Mean	\$145.20	.	.	.	\$152.99	\$193.60	.	\$177.72	\$117.68	\$103.21	.	\$169.99	.	\$124.66
	Median	\$85	.	.	.	\$85	\$170	.	\$85	\$85	\$85	.	\$85	.	\$85
TOTAL	Mean	\$3,063.54	.	.	.	\$3,190.75	\$3,131.79	\$2,394.01	\$2,715.67	\$3,548.66	\$3,403.26	.	\$3,227.42	.	\$3,224.16
	Median	\$3,315	.	.	.	\$3,315	\$3,400	\$1,742	\$2,847	\$3,740	\$3,655	.	\$3,400	.	\$3,400

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$537.11

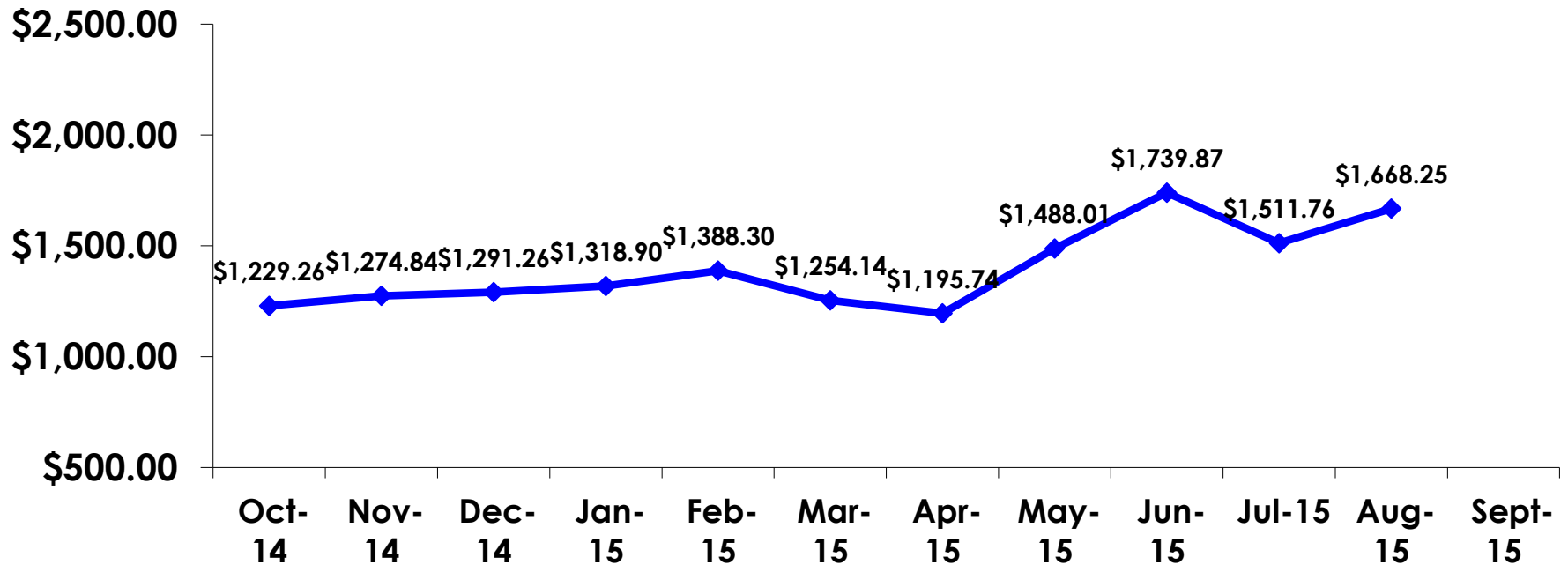
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
		-	N	-	TRVL	-	-	-	MISS	-
PER PERSON	Mean	\$651.79	\$836.55	\$669.50	\$724.44	\$676.46	\$617.40	\$568.54	\$778.15	\$680.72
	Median	\$700	\$867	\$750	\$640	\$740	\$675	\$667	\$773	\$750
	Minimum	\$0	\$0	\$0	\$600	\$0	\$0	\$0	\$0	\$0
	Maximum	\$1,750	\$1,750	\$1,500	\$933	\$1,750	\$1,750	\$1,250	\$1,700	\$1,750

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY/FIT	GROUP TRVL	ENG LANG LESSON	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$29.01	.	.	.	\$25.51	\$31.53	\$33.33	\$30.93	\$26.33	\$32.92	.	\$22.22	.	\$29.26
F&B FF/STORE	Mean	\$9.23	.	.	.	\$11.84	\$9.53	\$0.00	\$11.56	\$5.99	\$5.85	.	\$13.89	.	\$11.28
F&B RESTRNT	Mean	\$61.59	.	.	.	\$70.41	\$62.12	\$86.67	\$66.73	\$54.42	\$61.03	.	\$30.56	.	\$63.14
OPT TOUR	Mean	\$164.18	.	.	.	\$162.24	\$155.29	\$166.67	\$173.12	\$151.70	\$174.36	.	\$138.89	.	\$168.60
GIFT- SELF	Mean	\$218.18	.	.	.	\$281.63	\$198.82	\$366.67	\$257.32	\$163.61	\$202.56	.	\$122.22	.	\$208.68
GIFT- OTHER	Mean	\$171.87	.	.	.	\$220.41	\$160.59	\$383.33	\$202.93	\$128.57	\$152.31	.	\$150.00	.	\$161.36
TRANS	Mean	\$75.40	.	.	.	\$108.57	\$70.24	\$50.00	\$85.56	\$61.22	\$74.10	.	\$47.22	.	\$79.83
OTHER	Mean	\$1,220.06	.	.	.	\$1,097.14	\$1,308.59	\$1,113.33	\$920.78	\$1,637.41	\$1,398.46	.	\$1,725.00	.	\$1,362.60
TOTAL	Mean	\$1,957.44	.	.	.	\$2,016.33	\$1,996.71	\$2,200.00	\$1,762.54	\$2,229.25	\$2,115.90	.	\$2,250.00	.	\$2,096.28

TOTAL EXPENDITURES – TRACKING



YTD=\$1,396.39

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,668.25	\$2,040.91	\$1,710.51	\$1,667.88	\$1,730.56	\$1,581.37	\$1,481.50	\$1,937.06	\$1,725.01
	Median	\$1,791	\$1,984	\$1,942	\$1,728	\$1,905	\$1,737	\$1,654	\$1,941	\$1,850
	Minimum	\$0	\$0	\$0	\$933	\$0	\$0	\$0	\$0	\$0
	Maximum	\$3,612	\$3,612	\$2,965	\$2,342	\$3,612	\$3,322	\$2,593	\$3,612	\$3,450

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 2014, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2015, and Overall Oct-2014 - Aug 2015												
Drivers:	Oct-14 rank	Nov-14 rank	Dec-14 rank	Jan-15 rank	Feb-15 rank	Mar-15 rank	Apr-15 rank	May-15 rank	Jun-15 rank	Jul-15 rank	Aug-15 rank	Combi ned Oct- 2014 - Aug 2015 rank
Quality & Cleanliness of beaches & parks	3	2	7				6		2			6
Ease of getting around												
Safety walking around at night			5		2	2		6			5	7
Quality of daytime tours									6			
Variety of daytime tours										5	6	
Quality of nighttime tours				4			3			3		2
Variety of nighttime tours					3			3			1	
Quality of shopping												
Variety of shopping	2		4			4		1	1	4	4	5
Price of things on Guam				5								
Quality of hotel accommodations			2		1		2	5	3	2	3	4
Quality/cleanliness of air, sky		4		3		5	4			7		8
Quality/cleanliness of parks							1					1
Quality of landscape in Tumon				1		1				1	2	10
Quality of landscape in Guam	1	1	3	6		3	5	4	4			3
Quality of ground handler		3	1									
Quality/cleanliness of transportation vehicles			6	2				2	5	6	7	9
% of Per Person On Island Expenditures Accounted For	36.8%	24.8%	52.2%	49.9%	31.0%	45.2%	43.6%	41.1%	62.1%	32.2%	28.4%	40.8%

NOTE: Only significant drivers are included.

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by seven significant factors in the August 2015 Period. By rank order they are:
 - **Variety of night time tours,**
 - **Quality of landscape in Tumon,**
 - **Quality of hotel accommodations,**
 - **Variety of shopping,**
 - **Safety walking around at night,**
 - **Variety of daytime tours, and**
 - **Quality/cleanliness of transportation vehicles.**
- With all seven factors the overall r^2 is .284 meaning that **28.4% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan, Feb, Mar, Apr, May, Jun, Jul, Aug 2015 and Overall Oct-2014-Aug 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Combi ned Oct- 2014- Aug 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks												4
Ease of getting around					3							1
Safety walking around at night					2	1						2
Quality of daytime tours												
Variety of daytime tours					1				1			6
Quality of nighttime tours			1									5
Variety of nighttime tours		2			4							
Quality of shopping		3	2						2			
Variety of shopping												
Price of things on Guam	2	1										3
Quality of hotel accommodations											1	
Quality/cleanliness of air, sky												
Quality/cleanliness of parks												
Quality of landscape in Tumon	1											9
Quality of landscape in Guam		4										8
Quality of ground handler							1					7
Quality/cleanliness of transportation vehicles												
% of Per Person On Island Expenditures Accounted For	6.6%	9.7%	2.4%	0.0%	5.7%	2.2%	10.0%	0.0%	15.8%	0.0%	1.3%	1.8%

NOTE: Only significant drivers are included.

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Korean visitors on Guam is driven by one significant factor in the August 2015 Period. It is:
 - **Quality of hotel accommodations.**
- With this factor the overall r^2 is .013 meaning that **1.3% of per person on island expenditure is accounted for by this factor.**