



GUAM VISITORS BUREAU
Korean Visitor Tracker Exit Profile
FY2011 MARKET SEGMENTATION
AUGUST 2011



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 **354** 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 **354** 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

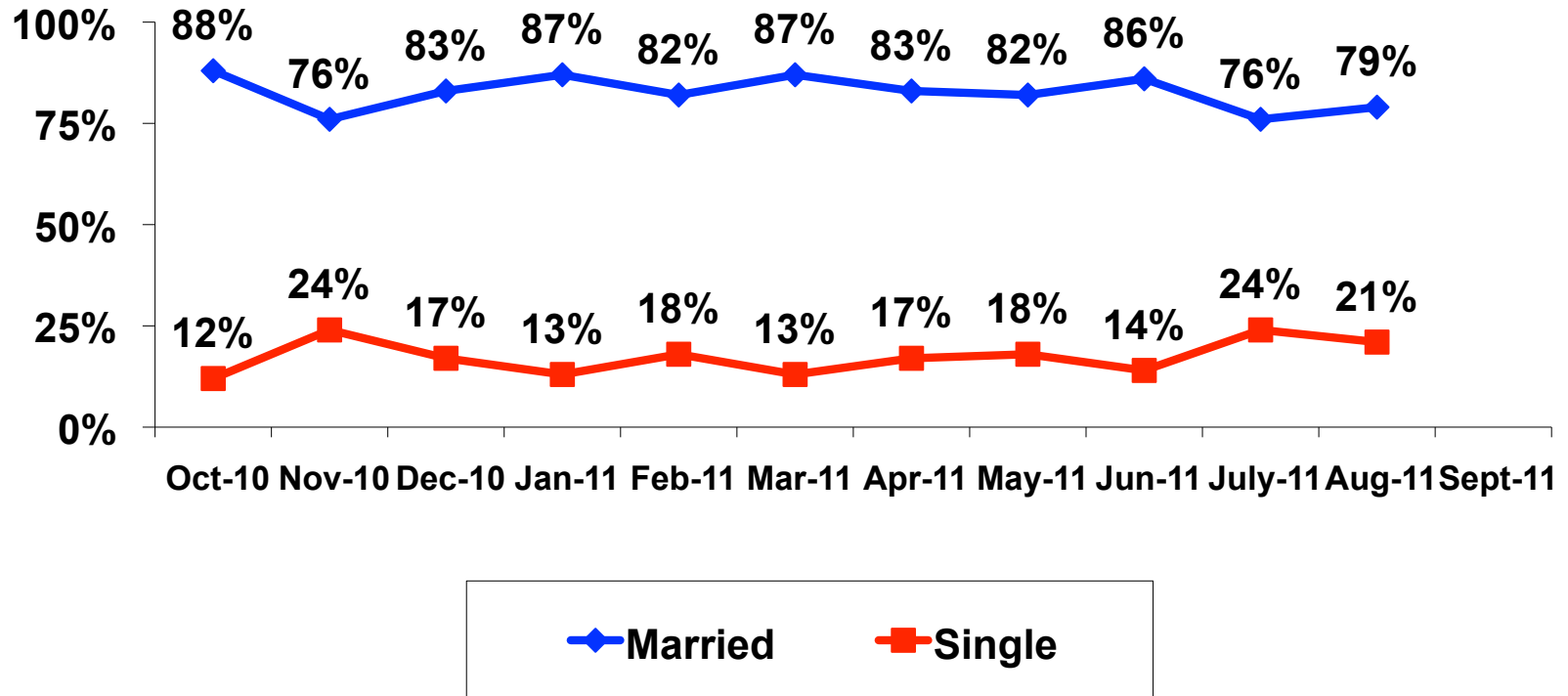
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 10	Nov 10	Dec 10	Jan 11	Feb 11	Mar 11	Apr 11	May 11	Jun 11	Jul 11	Aug 11	Sept 11
Families	41%	42%	31%	48%	58%	26%	28%	44%	44%	54%	56%	
Repeaters	14%	17%	18%	12%	23%	16%	16%	19%	21%	15%	21%	
Shoppers	54%	62%	57%	56%	53%	61%	62%	64%	59%	55%	63%	
Seniors	4%	5%	6%	9%	6%	5%	3%	5%	3%	4%	3%	
OL/Salary woman	10%	11%	16%	7%	9%	12%	16%	15%	13%	13%	14%	
Group Travelers	5%	6%	2%	3%	1%	1%	1%	1%	2%	1%	1%	
Students	1%	2%	2%	1%	1%	1%	2%	2%	3%	1%	1%	
Golfers	5%	7%	9%	8%	8%	4%	5%	5%	4%	5%	4%	
Wedding	1%	1%	1%	1%	0%	1%	1%	0%	-	0%	-	
Divers	17%	24%	17%	18%	16%	14%	18%	17%	11%	15%	14%	
Honey-mooner	25%	13%	28%	16%	7%	38%	31%	19%	20%	5%	2%	
TOTAL	353	352	354	353	353	353	353	352	352	354	354	5

SECTION 1
PROFILE OF RESPONDENTS

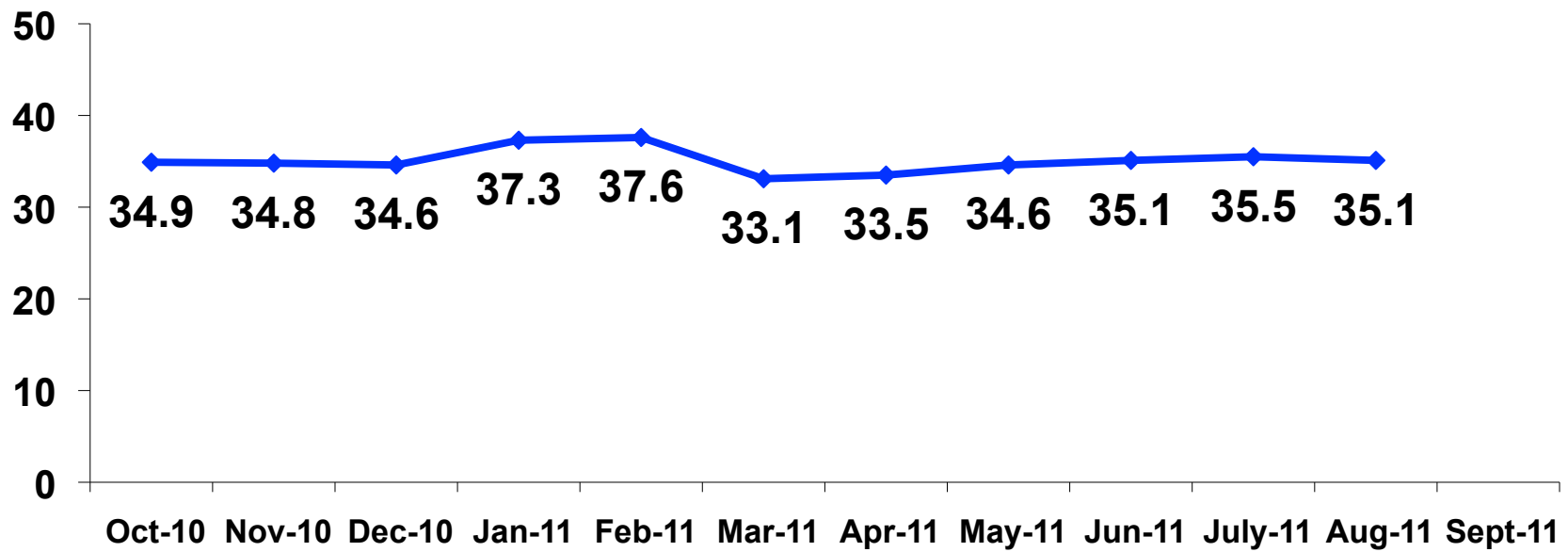
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
B	Married	Count	280	182	61	183	32	3	2	11		6	33	10
		Col %	79%	91%	82%	82%	65%	75%	100%	85%		100%	65%	100%
	Single	Count	74	17	13	41	17	1		2			18	
		Col %	21%	9%	18%	18%	35%	25%		15%			35%	
Total	Count		354	199	74	224	49	4	2	13		6	51	10

Average Age Tracking



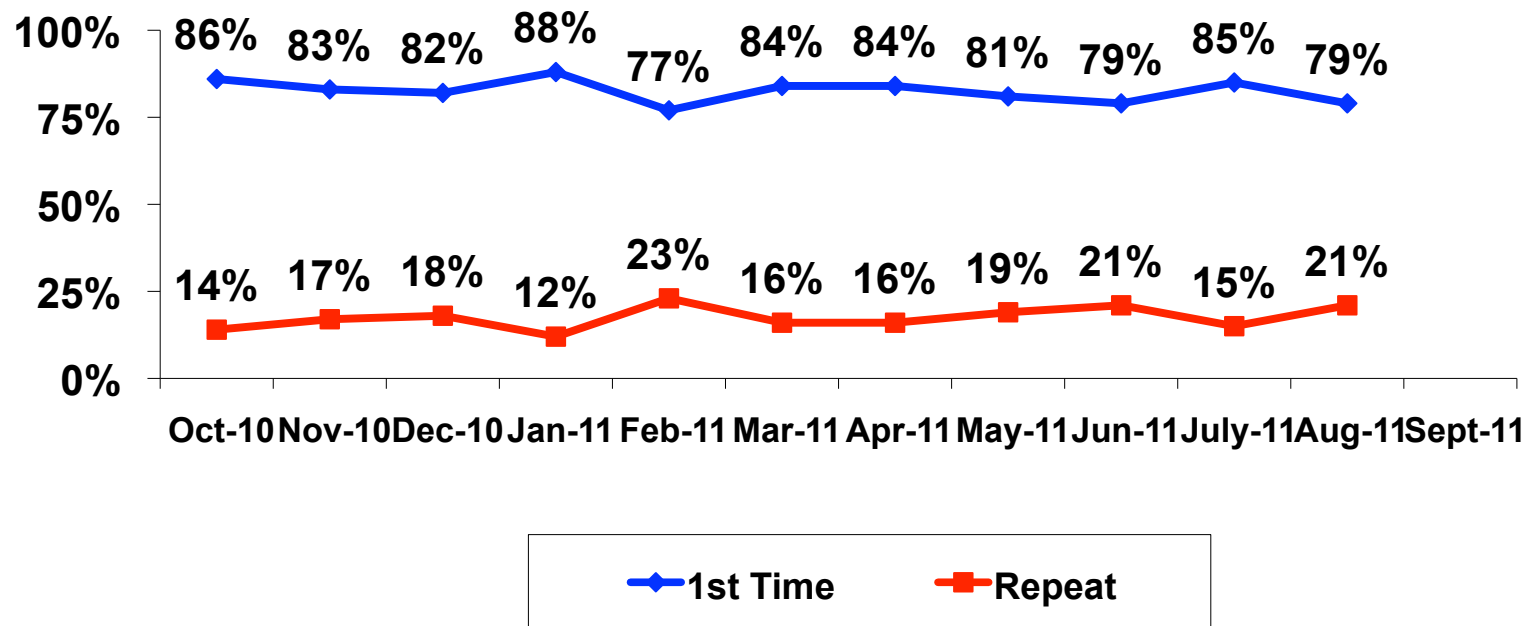
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	172	56	20	111	35	2	2	4		3	28	
		Col %	49%	28%	27%	50%	71%	50%	100%	31%		50%	55%	
	35-54	Count	180	142	53	112	14	1		9		3	23	8
		Col %	51%	71%	72%	50%	29%	25%		69%		50%	45%	80%
	55+	Count	2	1	1	1		1						2
		Col %	1%	1%	1%	0%		25%						20%
Total	Count		354	199	74	224	49	4	2	13		6	51	10
C	Mean		35.1	37.4	37.5	35.2	31.3	41.3	33.5	37.4		34.3	34.1	53.0
	Median		35	37	37	35	30	40	34	36		34	33	52

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR	
Q.31	Less than KW12 million	Count	2		1	1							1		
		Col %	1%		1%	0%								2%	
	KW12M-KW24M	Count	19	3		12	4						6		
		Col %	6%	2%		6%	9%							13%	
	KW24M-KW36M	Count	37	13	8	23	10						5		
		Col %	11%	7%	12%	11%	22%							11%	
	KW36M-KW48M	Count	54	29	11	29	12	1			1		3	6	2
		Col %	16%	16%	16%	14%	27%	33%			8%		60%	13%	25%
	KW48M-KW60M	Count	55	30	12	36	5	1			2		1	7	1
		Col %	17%	16%	18%	17%	11%	33%			17%		20%	15%	13%
	KW60M-KW72M	Count	38	18	5	24	4				2		1	6	
		Col %	12%	10%	7%	11%	9%				17%		20%	13%	
	KW72M+	Count	119	88	29	82	10	1			7			16	5
		Col %	36%	48%	43%	39%	22%	33%			58%			34%	53%
	No Income	Count	6	4	1	4				1					
		Col %	2%	2%	1%	2%				100%					
Total	Count	330	185	67	211	45	3		1	12		5	47	8	

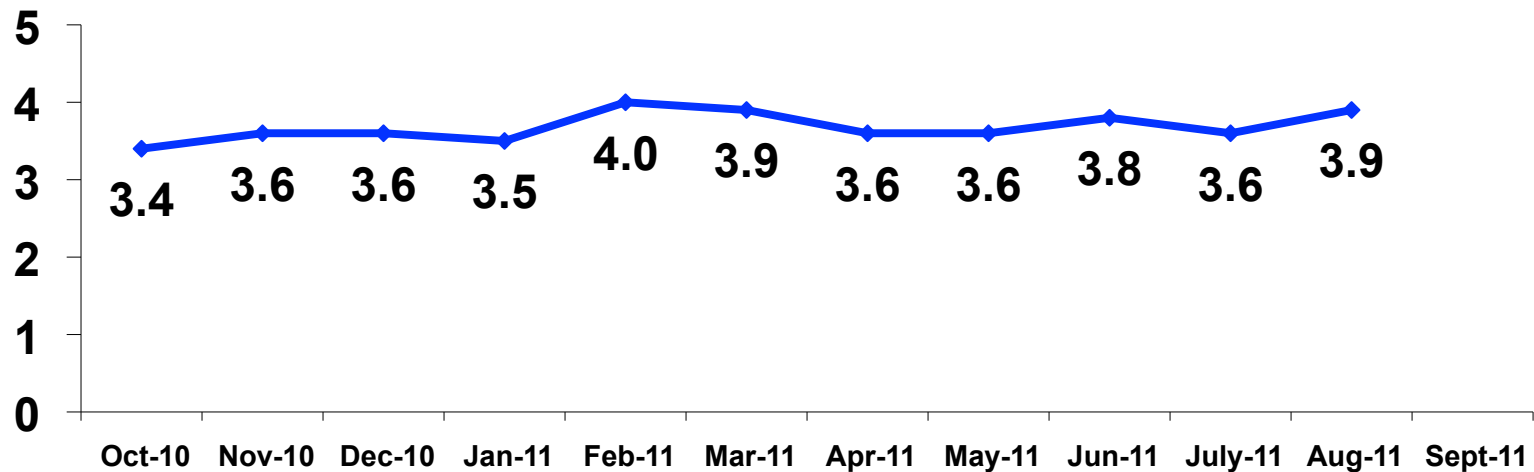
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		277	142		180	41	3		11		5	45	6
	Col %		79%	72%		81%	84%	75%		85%		83%	88%	60%
No	Count		74	56	74	41	8	1	1	2		1	6	4
	Col %		21%	28%	100%	19%	16%	25%	100%	15%		17%	12%	40%
Total	Count		351	198	74	221	49	4	1	13		6	51	10

Average Length of Stay Tracking



Average Length of Stay Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Q.8	Mean	3.9	3.9	4.7	3.9	3.4	3.3	22.0	3.9	.	4.0	4.0	4.5
	Median	3	4	4	4	3	3	22	4	.	4	3	4
	Minimum	1	3	1	2	1	3	4	3	.	3	3	3
	Maximum	40	40	40	31	5	4	40	5	.	5	31	10

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Q.7	Full package tours	Count	176	124	30	109	18			9		2	37	2
		Col %	50%	62%	41%	49%	37%			69%		33%	73%	20%
	Free-time package tours	Count	139	56	27	88	28		1	3		3	12	1
		Col %	39%	28%	36%	39%	57%		50%	23%		50%	24%	10%
	Individually arranged travel	Count	34	18	16	24	3		1	1		1	1	5
		Col %	10%	9%	22%	11%	6%		50%	8%		17%	2%	50%
	Group tour	Count	4	1	1	2		4					1	2
		Col %	1%	1%	1%	1%		100%					2%	20%
	Company paid travel	Count	1			1								
		Col %	0%			0%								
Total	Count	354	199	74	224	49	4	2	13		6	51	10	

Travel Motivation Segmentation

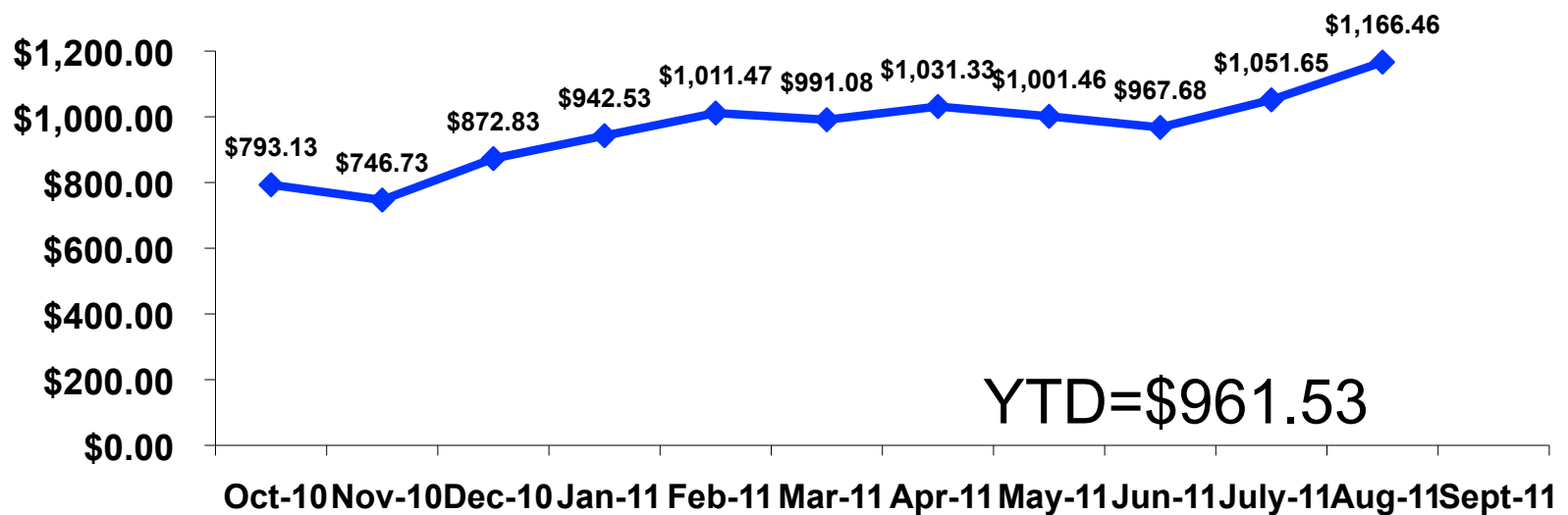
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	67%	64%	62%	71%	71%	25%	50%	77%		17%	61%	40%
	Beautiful seas, beaches, tropical climate	53%	51%	42%	55%	54%	75%	50%	23%		50%	53%	70%
	It is a safe place to spend a vacation	35%	39%	41%	36%	31%	25%	100%	38%		33%	29%	30%
	Short travel time	32%	31%	34%	33%	38%	75%	50%	31%			25%	30%
	Shopping	16%	15%	24%	21%	21%			15%		33%	8%	
	Recommendation of friend, relative, travel agency	14%	17%	5%	14%	21%			38%			22%	
	A previous visit	10%	13%	46%	9%	6%	25%	50%	8%		17%	6%	20%
	Pleasure	12%	14%	18%	12%	8%	25%				17%	14%	10%
	Water sports	11%	12%	8%	13%	13%			23%			12%	10%
	Price of the tour package	3%	4%	4%	3%	4%						4%	
	To visit friends or relatives	3%	2%	9%	3%							4%	
	Honeymoon	2%	1%	1%	2%	2%					100%	2%	
	Other	2%	3%	1%	2%								10%
	Promotional materials from GVB	2%	2%	1%	2%							4%	10%
	Company or Business trip	2%	1%	5%	1%	2%							10%
	Organized Sporting Activity	2%	1%	1%	2%				15%		17%		
	SCUBA diving	1%	1%	1%	0%	4%	25%					6%	
	To golf	1%	1%	1%	1%	2%			15%			2%	
	Career certification or testing	1%	1%	4%	1%								
	My company sponsored me	0%	1%		0%							2%	
	Convention, Conference, Trade show	0%			0%							2%	
	Special promotion	0%			0%								
Total	Cases	353	199	74	223	48	4	2	13		6	51	10

Information Sources Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	87%	86%	76%	86%	90%	50%	100%	69%	.	67%	80%	50%
	Travel agent brochure	39%	39%	26%	42%	35%	75%		62%		33%	55%	30%
	I have been to Guam before	21%	28%	99%	18%	16%	25%	50%	15%		17%	12%	40%
	Friend or relative	18%	19%	11%	20%	16%	50%	50%	8%		50%	14%	30%
	Travel guide book at bookstores	12%	12%	8%	15%	18%		50%	15%		17%	12%	10%
	Guam promo activities	11%	10%	8%	14%	14%			8%			8%	10%
	Company travel department	12%	10%	3%	11%	16%	25%		15%		33%	12%	10%
	TV	9%	10%	9%	8%	6%	25%	50%	8%			10%	20%
	Newspaper	3%	3%	4%	3%	2%	50%	50%				6%	20%
	Magazine	2%	2%		2%	2%						2%	
Total	Cases	354	199	74	224	49	4	2	13		6	51	10

SECTION 3 **EXPENDITURES**

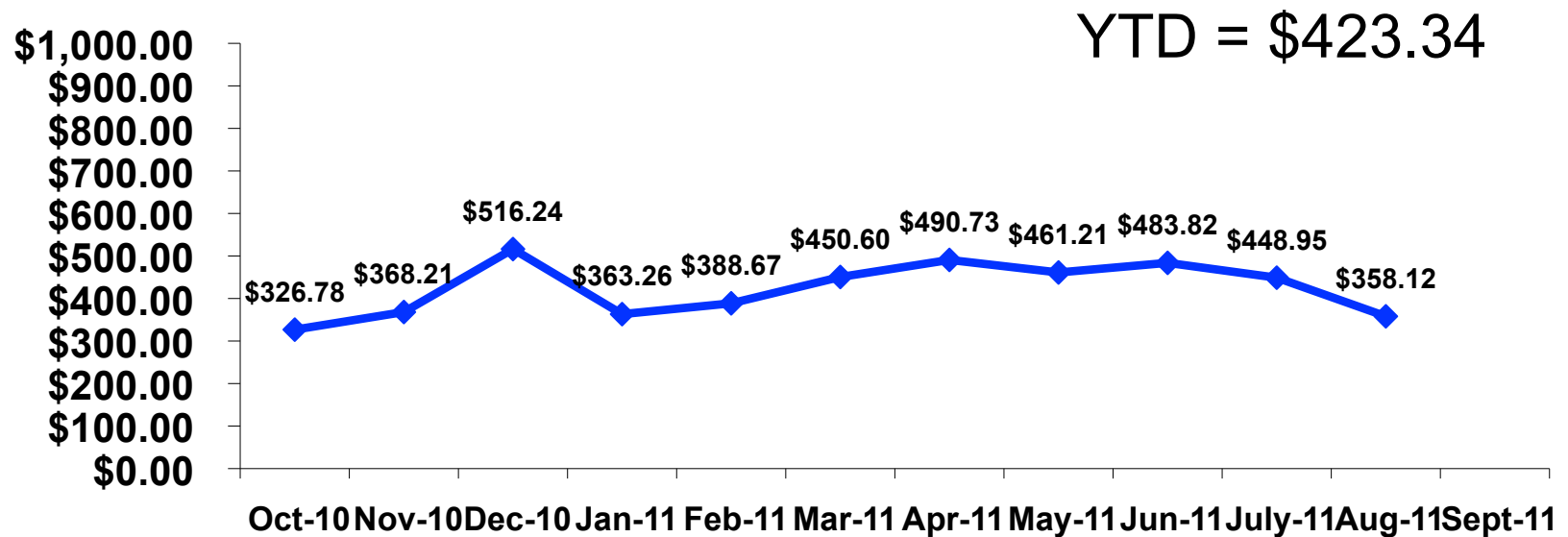
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$1,166.46	\$1,060.96	\$1,017.10	\$1,189.42	\$1,191.59	\$1,149.87	\$1,408.00	\$1,125.06	.	\$1,211.66	\$1,154.59	\$943.68
	Median	\$1,285	\$1,246	\$1,076	\$1,314	\$1,314	\$1,173	\$1,408	\$1,291	.	\$1,190	\$1,252	\$1,075
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$844.80	\$0.00	\$0.00	.	\$0.00	\$0.00	\$0.00
	Maximum	\$3,726.51	\$3,285.34	\$3,726.51	\$3,726.51	\$2,346.67	\$1,408.00	\$2,816.00	\$2,440.54	.	\$2,252.80	\$2,252.80	\$2,033.78

On-Island Expenditures Tracking



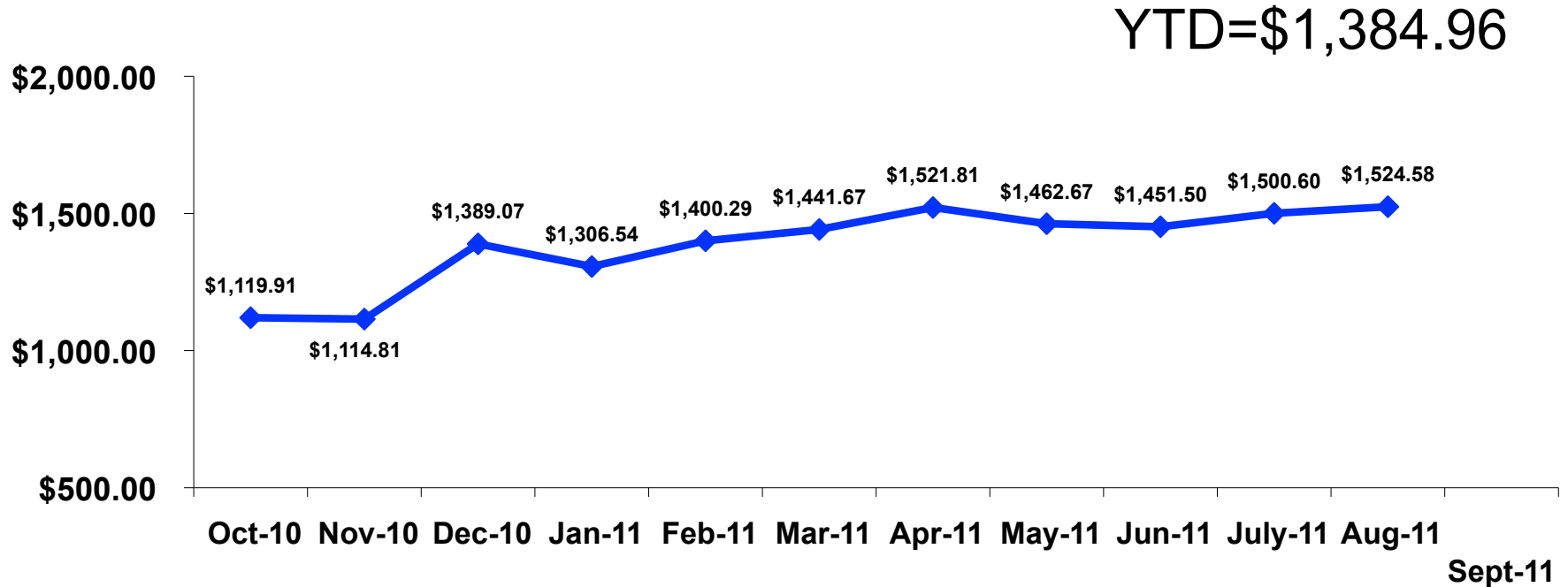
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$358.12	\$274.99	\$374.49	\$400.10	\$408.08	\$400.00	\$250.00	\$362.39	.	\$458.33	\$346.59	\$364.00
	Median	\$250	\$175	\$250	\$277	\$265	\$425	\$250	\$200	.	\$350	\$250	\$62
	Minimum	\$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	\$2,000.00	\$3,000.00	\$3,000.00	\$2,000.00	\$750.00	\$500.00	\$1,200.00	.	\$1,250.00	\$2,000.00	\$2,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$37.03	\$39.90	\$70.12	\$32.08	\$26.00	\$0.00	\$0.00	\$10.77	.	\$0.00	\$15.47	\$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
F&B-FF REST/CONV	Mean	\$31.27	\$33.86	\$40.54	\$31.63	\$20.31	\$0.00	\$0.00	\$13.08	.	\$33.33	\$21.18	\$4.00
	Median	\$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	\$58.27	\$44.53	\$78.24	\$62.93	\$79.73	\$35.00	\$0.00	\$26.15	.	\$116.67	\$18.73	\$12.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	.	\$0.00	\$0.00	\$0.00
OPTIONAL TOUR	Mean	\$107.88	\$114.51	\$107.23	\$101.66	\$97.65	\$215.00	\$0.00	\$195.38	.	\$53.33	\$192.84	\$50.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$180.00	\$0.00	\$0.00	.	\$0.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$224.21	\$242.39	\$226.76	\$278.06	\$159.18	\$340.00	\$0.00	\$342.31	.	\$166.67	\$132.65	\$154.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$180.00	\$0.00	\$0.00	.	\$100.00	\$0.00	\$0.00
GIFT/SOUV- F&F AT HOME	Mean	\$82.95	\$64.32	\$70.00	\$88.60	\$91.84	\$505.00	\$0.00	\$75.00	.	\$203.33	\$46.57	\$200.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	.	\$110.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$39.07	\$19.99	\$37.24	\$38.17	\$44.22	\$0.00	\$0.00	\$5.92	.	\$71.67	\$18.24	\$9.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	.	\$15.00	\$0.00	\$0.00
OTHER EXP	Mean	\$285.78	\$308.59	\$313.42	\$313.12	\$300.77	\$80.00	\$500.00	\$222.31	.	\$471.67	\$321.88	\$253.00
	Median	\$43.00	\$50.00	\$46.50	\$50.00	\$65.00	\$20.00	\$500.00	\$70.00	.	\$165.00	\$40.00	\$0.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WED DING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,524.58	\$1,335.95	\$1,391.59	\$1,589.53	\$1,599.67	\$1,549.87	\$1,658.00	\$1,487.45	.	\$1,670.00	\$1,501.18	\$1,312.68
	Median	1589.30	1458.00	1400.49	1621.07	1598.61	1551.40	1658.00	1731.11	.	1462.32	1580.27	1379.37
	Minimum	.00	.00	.00	.00	.00	938.67	.00	.00	.	1243.73	.00	16.67
	Maximum	4726.51	3783.47	4726.51	4726.51	3946.67	2158.00	3316.00	2995.54	.	2552.80	3576.96	2158.00

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 2010, Jan, Feb, Mar, Apr, May, June, July, Aug 2011 and Overall Oct 2010 - Aug 2011												
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Combined Oct 2010 - Aug 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	2	4	3		3	2	2	2		3
Ease of getting around				2	4							7
Safety walking around at night												
Quality of daytime tours		1				3	1				2	2
Variety of daytime tours	2		4	5	2	2		3	3			5
Quality of nighttime tours						4	5			3		
Variety of nighttime tours												
Quality of shopping			3	3			4	4	4	4	3	4
Variety of shopping				6								
Price of things on Guam												6
Quality of hotel accommodations	1	2	1	1	1	1	2	1	1	1	1	1
% of Overall Satisfaction Accounted For	54.5%	38.5%	57.9%	50.4%	53.7%	43.6%	42.9%	47.5%	47.5%	53.8%	42.7%	47.7%

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 August 2011 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of daytime tours, and**
 - **Quality of shopping.**
- With all three factors the overall r^2 is .427 meaning that **42.7% of overall satisfaction is accounted for by these three factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2010, and Jan, Feb, Mar, Apr, May, June, July, August 2011 and Overall Oct 2010 - August 2011												
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Combined Oct 2010 - Aug 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks												
Ease of getting around												3
Safety walking around at night								1				
Quality of daytime tours												
Variety of daytime tours												
Quality of nighttime tours										2		
Variety of nighttime tours				1					1		1	1
Quality of shopping	1									1	2	2
Variety of shopping								2	2			
Price of things on Guam												
Quality of hotel accommodations												
% of Overall Satisfaction Accounted For	1.8%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	4.2%	3.8%	2.0%	10.9%	1.9%
NOTE: Only significant variables are ranked.												

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** with the Korean visitors on Guam is driven by two significant factors in the August 2011 Period, by rank order they are:
 - **Variety of nighttime tours, and**
 - **Quality of shopping.**
- With these two factors the overall r^2 is .109 meaning that **10.9% of per person on island expenditure is accounted for by these two factors.**