



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **FY2010 MARKET SEGMENTATION –**

### **DECEMBER 2009**



**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 **353** 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 **353** 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.

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# 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.

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# Highlighted Segments

## Parameters

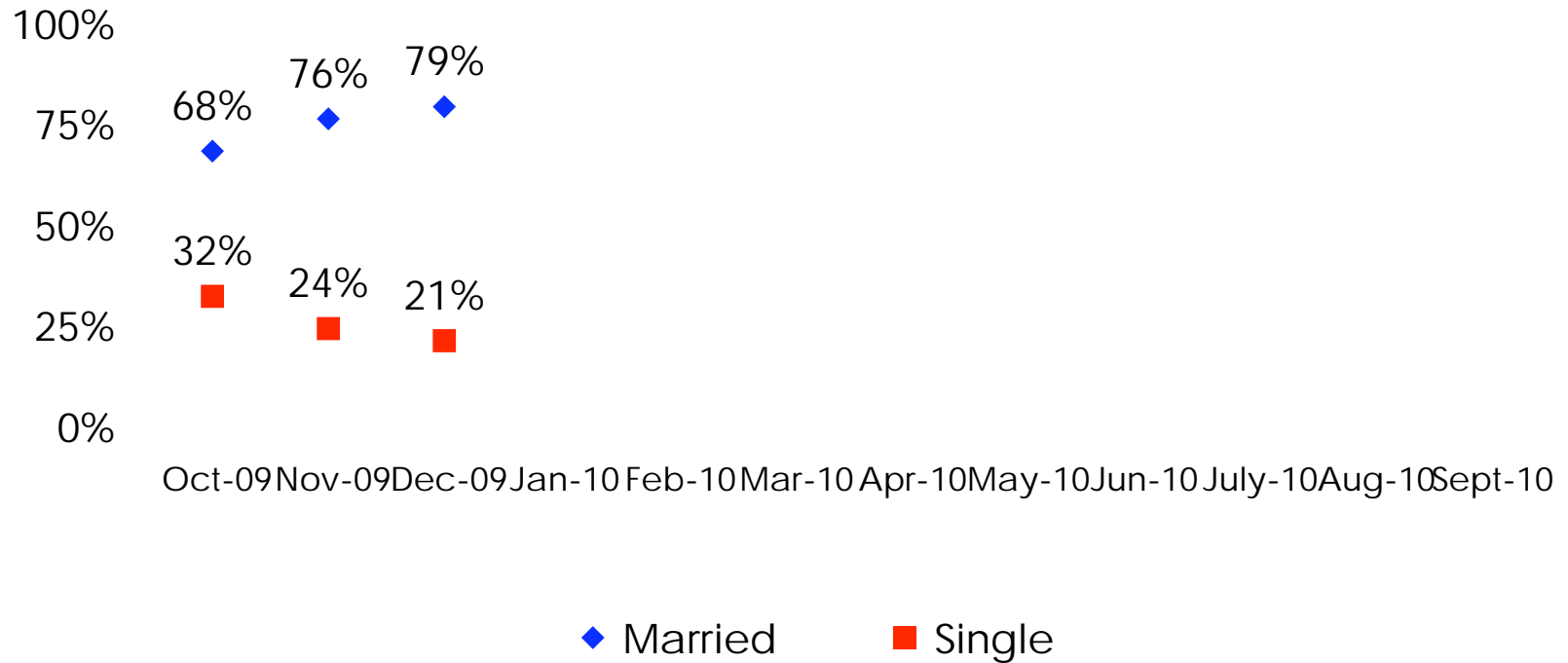
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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

# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Tracking



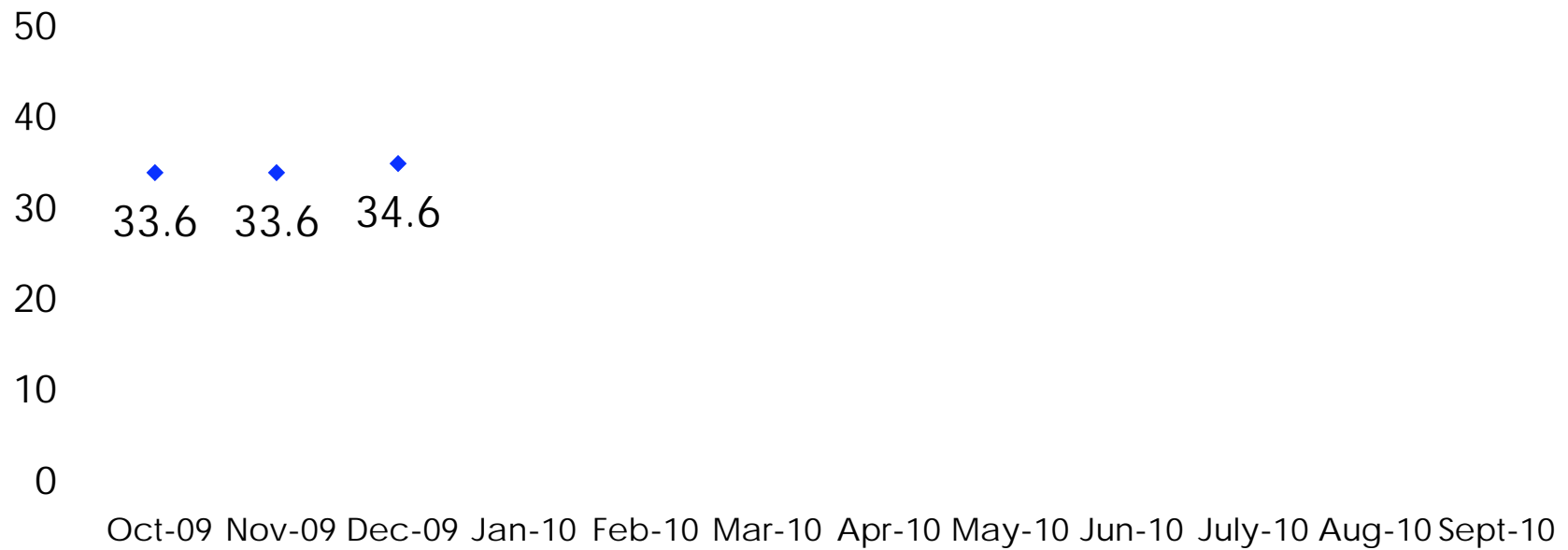
# Marital Status - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	279	89	54	157	25	16	1	11	5	80	59	16
		Col %	79%	83%	82%	78%	53%	76%	50%	73%	100%	96%	76%	100%
	Single	Count	74	18	12	44	22	5	1	4		3	19	
		Col %	21%	17%	18%	22%	47%	24%	50%	27%		4%	24%	
Total		Count	353	107	66	201	47	21	2	15	5	83	78	16



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# Average Age - Tracking



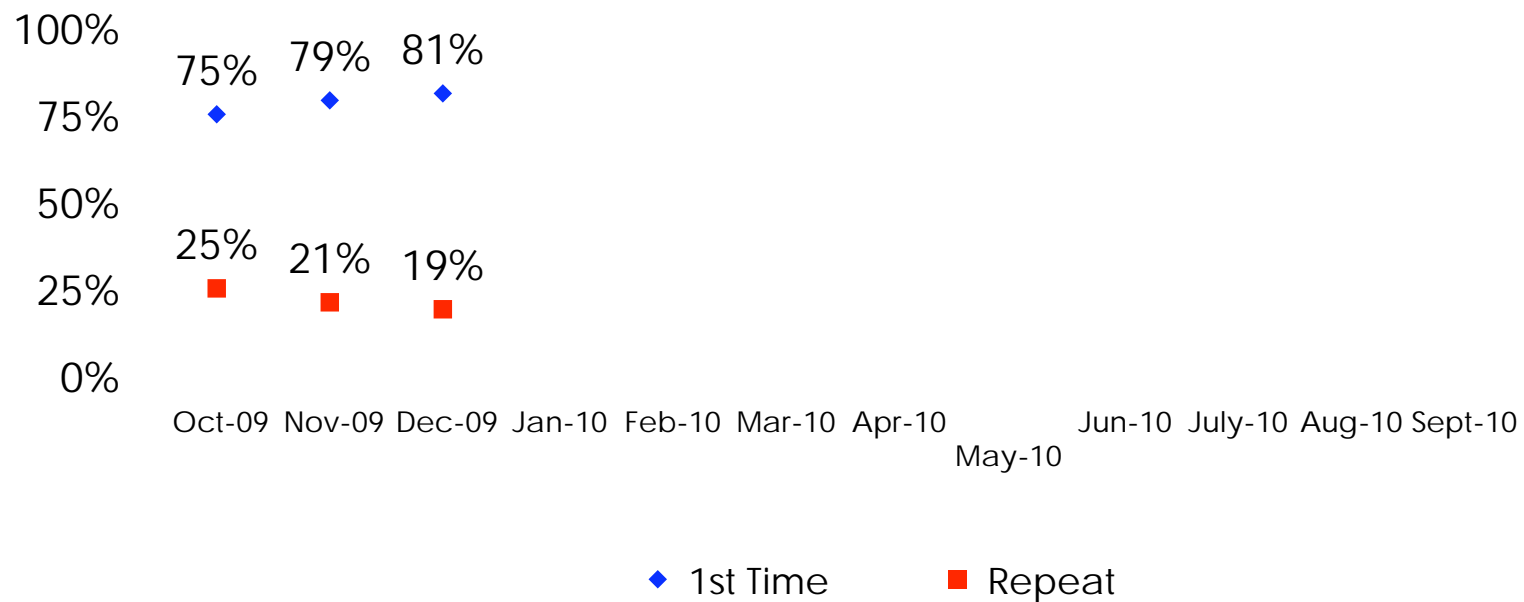
# Age - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	194	29	23	116	30	11	2	7	2	69	57	
		Col %	55%	27%	35%	58%	64%	52%	100%	47%	40%	83%	73%	
	35-54	Count	150	75	41	82	17	9		8	3	14	18	7
		Col %	42%	70%	62%	41%	36%	43%		53%	60%	17%	23%	44%
	55+	Count	9	3	2	3		1					3	9
		Col %	3%	3%	3%	1%		5%					4%	56%
Total	Count		353	107	66	201	47	21	2	15	5	83	78	16
C	Mean		34.6	36.9	37.8	34.2	32.3	35.5	29.5	36.0	35.8	30.7	32.7	55.7
	Median		34	38	39	34	30	33	30	38	39	30	31	55

# Income - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count	2			1						2	1	
		Col %	1%			1%						3%	1%	
	KW12M-KW24M	Count	25	3	4	15	2	1		3		9	6	1
		Col %	7%	3%	6%	8%	5%	5%		20%		11%	8%	6%
	KW24M-KW36M	Count	74	13	10	43	15	10		2	2	27	18	2
		Col %	22%	13%	16%	22%	34%	50%		13%	40%	34%	24%	13%
	KW36M-KW48M	Count	62	13	8	29	11	4		2	1	20	20	2
		Col %	18%	13%	13%	15%	25%	20%		13%	20%	25%	27%	13%
	KW48M-KW60M	Count	54	14	8	35	5	1		2		13	9	3
		Col %	16%	13%	13%	18%	11%	5%		13%		16%	12%	19%
	KW60M-KW72M	Count	39	21	10	29	4	2			2	3	8	3
		Col %	11%	20%	16%	15%	9%	10%			40%	4%	11%	19%
	KW72M+	Count	77	37	21	37	7	1		6		5	10	5
		Col %	23%	36%	33%	19%	16%	5%		40%		6%	14%	31%
	No Income	Count	8	3	2	5		1	2			1	2	
		Col %	2%	3%	3%	3%		5%	100%			1%	3%	
Total	Count	341	104	63	194	44	20	2	15	5	80	74	16	

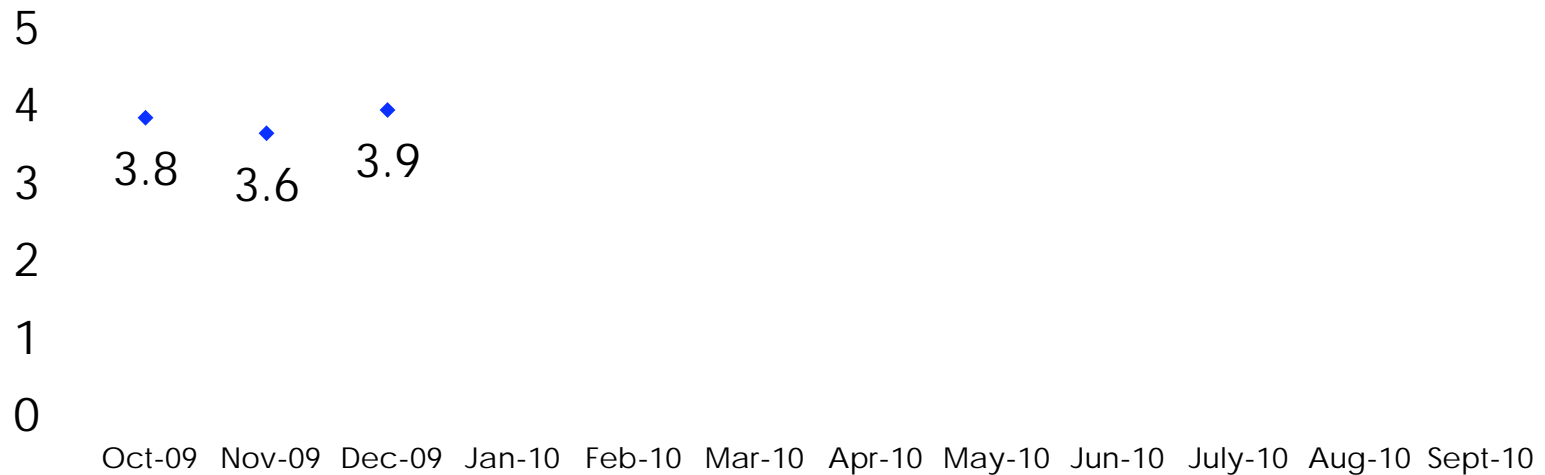
# Prior Trips to Guam - Tracking



# Prior Trips to Guam - Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		287	82		172	43	20	1	9	4	80	72	11
	Col %		81%	77%		86%	91%	95%	50%	60%	80%	96%	92%	69%
No	Count		66	25	66	29	4	1	1	6	1	3	6	5
	Col %		19%	23%	100%	14%	9%	5%	50%	40%	20%	4%	8%	31%
Total	Count		353	107	66	201	47	21	2	15	5	83	78	16

# 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	3.9	3.4	5.1	3.6	3.3	3.0	3.5	9.5	3.2	3.3	3.9	3.8
Median	3	3	3	3	3	3	4	4	3	3	3	3
Minimum	1	2	1	2	3	3	3	2	3	2	3	2
Maximum	52	10	52	47	5	3	4	52	4	5	47	10

# 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	221	72	25	129	29			6	3	70	57	10
		Col %	63%	67%	38%	64%	62%			40%	60%	84%	73%	53%
	Free-time package tours	Count	89	28	27	52	11		1	6	2	12	13	3
		Col %	25%	26%	42%	26%	23%		50%	40%	40%	14%	17%	19%
	Individually arranged travel	Count	16	4	7	7	2			2		1	1	1
		Col %	5%	4%	11%	3%	4%			13%		1%	1%	6%
	Group tour	Count	21	2	1	12	5	21	1				6	1
		Col %	6%	2%	2%	6%	11%	100%	50%				8%	6%
	Other	Count	5	1	5	1				1			1	1
		Col %	1%	1%	8%	0%				7%			1%	6%
Total	Count		352	107	65	201	47	21	2	15	5	83	78	16

# Travel Motivation - Segmentation

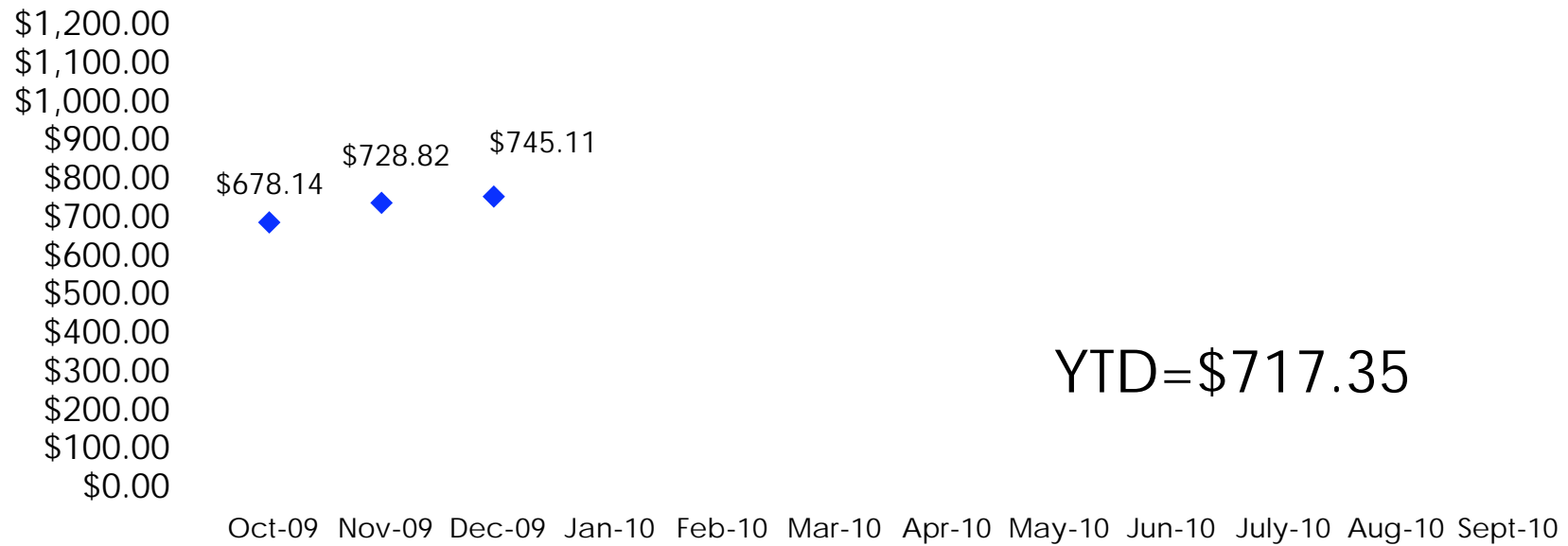
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Just to relax	53%	71%	46%	55%	53%	43%	100%	33%	20%	42%	47%	38%
Beautiful seas, beaches, tropical climate	34%	43%	31%	37%	38%	14%	50%	20%	20%	23%	27%	38%
Short travel time	27%	38%	23%	29%	32%	19%		27%	20%	18%	19%	25%
Honeymoon	24%	1%	5%	25%	21%			20%	20%	100%	37%	
It is a safe place to spend a vacation	18%	24%	11%	19%	13%	24%			20%	12%	15%	13%
Shopping	15%	20%	23%	17%	13%	10%		7%	20%	6%	8%	6%
My company sponsored me	13%	3%	6%	15%	26%	81%	50%	20%			22%	6%
Recommendation of friend, relative, travel agency	14%	11%	8%	12%	4%			7%	20%	16%	15%	6%
Price of the tour package	12%	17%	11%	11%	6%	10%		13%	20%	7%	4%	13%
Water sports	9%	12%	9%	10%	6%					8%	14%	19%
A previous visit	8%	13%	42%	7%	2%			20%	20%	1%	1%	25%
Pleasure	9%	9%	12%	9%	9%		50%		20%	7%	5%	19%
To visit friends or relatives	4%	6%	11%	4%	2%			27%		2%	5%	6%
Company or Business trip	4%	1%	14%	2%	2%	5%		13%			3%	13%
To golf	2%	3%	8%	1%	2%			33%			3%	6%
SCUBA diving	2%	2%	2%	1%	2%					4%	5%	6%
To get married or Attend wedding	1%	1%	2%	2%					100%	1%		
Organized Sporting Activity	1%	4%		2%	2%						1%	
Promotional materials from GVB	2%	1%		1%							1%	
Other	1%	2%	2%	0%								
Career certification or testing	1%	1%	2%	1%								
Special promotion	0%			0%	2%						1%	
Total Cases	352	107	65	201	47	21	2	15	5	83	78	16

# Information Sources - Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	85%	89%	79%	86%	87%	71%	100%	87%	100%	86%	85%	56%
Travel agent brochure	46%	44%	23%	47%	45%	57%	50%	27%	80%	64%	47%	50%
I have been to Guam before	18%	22%	98%	14%	9%	5%	50%	40%	20%	4%	8%	31%
Friend or relative	20%	21%	12%	21%	17%	10%		27%		22%	23%	25%
Company travel department	13%	7%	8%	11%	13%	29%		20%		12%	22%	19%
Guam promo activities	10%	7%	8%	13%	19%	5%			20%	7%	6%	25%
TV	8%	9%	5%	8%	2%	19%				2%	6%	25%
Travel guide book at bookstores	5%	4%		6%	11%					5%	3%	
Magazine	4%	4%	6%	3%	6%			13%		4%	4%	
Newspaper	4%	5%	3%	4%				13%		4%	5%	25%
Pod casts	0%	1%										6%
Total Cases	353	107	66	201	47	21	2	15	5	83	78	16

# SECTION 3 **EXPENDITURES**

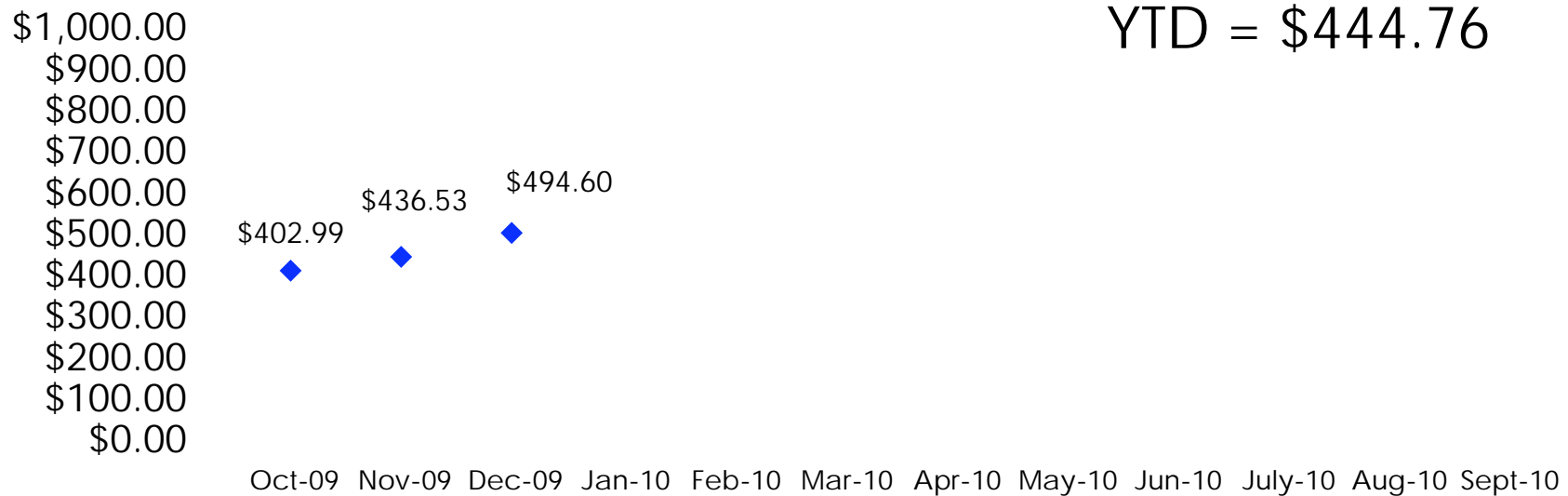
# Prepaid Expenditures - Tracking



# Prepaid Expenditures Per Person - Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$745.11	\$633.03	\$646.93	\$769.22	\$739.27	\$280.62	\$487.14	\$900.40	\$1,590.19	\$1,144.91	\$797.08	\$767.16
	Median	\$716	\$645	\$636	\$722	\$716	\$40	\$487	\$731	\$1,075	\$1,201	\$765	\$790
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$257.90	\$0.00	\$536.42	\$0.00	\$0.00	\$0.00
	Maximum	\$4,298.27	\$2,149.13	\$3,868.44	\$4,298.27	\$1,689.22	\$1,031.58	\$716.38	\$3,868.44	\$4,298.27	\$4,298.27	\$3,868.44	\$1,725.18

# 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	\$494.60	\$304.87	\$952.73	\$591.90	\$354.92	\$336.28	\$783.33	\$2,311.42	\$601.50	\$448.32	\$795.06	\$462.31
	Median	\$300	\$250	\$366	\$300	\$333	\$300	\$783	\$400	\$350	\$350	\$334	\$338
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$166.67	\$0.00	\$50.00	\$0.00	\$0.00	\$10.00
	Maximum	\$30,000.00	\$2,650.00	\$30,000.00	\$30,000.00	\$1,110.00	\$1,205.00	\$1,400.00	\$30,000.00	\$2,000.00	\$3,000.00	\$30,000.00	\$1,900.00



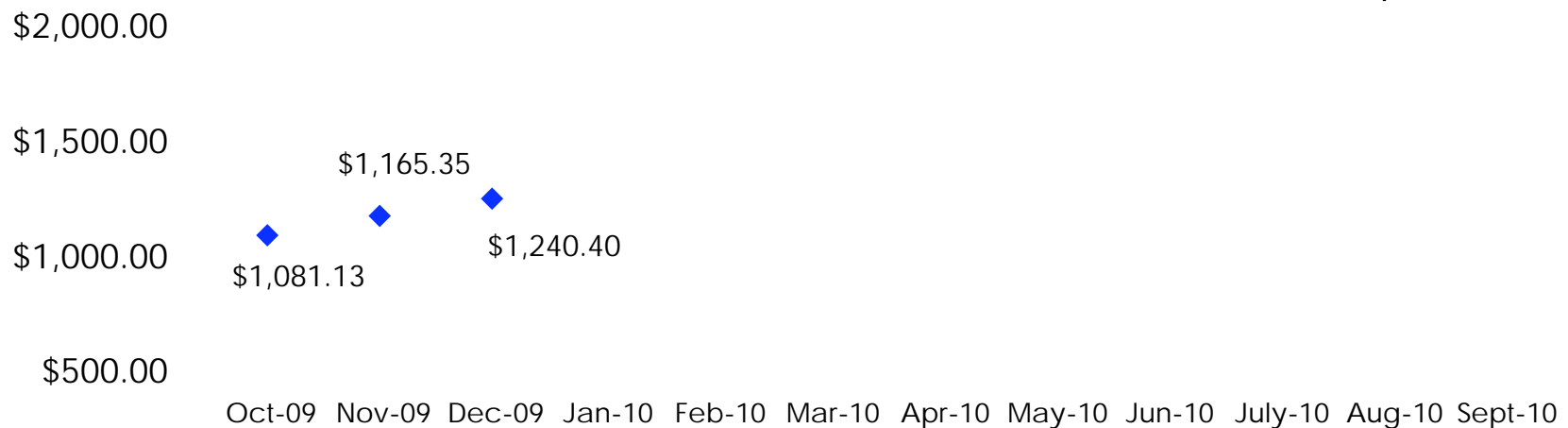
# On-Island Expense Breakdown- Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$74.21	\$38.52	\$260.56	\$108.94	\$23.77	\$10.71	\$0.00	\$958.67	\$60.00	\$52.88	\$200.59	\$32.94
	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	\$28.23	\$21.69	\$62.59	\$29.18	\$13.83	\$5.81	\$15.00	\$94.67	\$42.00	\$31.88	\$28.15	\$15.50
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$49.28	\$25.29	\$121.29	\$63.89	\$28.30	\$10.95	\$50.00	\$384.67	\$80.00	\$38.15	\$81.56	\$29.63
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OPTIONAL TOUR	Mean	\$104.84	\$126.13	\$80.23	\$115.22	\$105.85	\$82.62	\$0.00	\$174.20	\$38.00	\$154.70	\$173.18	\$145.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$60.00	\$0.00	\$0.00	\$0.00	\$100.00	\$120.00	\$90.00
GIFT/ SOUV-SELF	Mean	\$189.09	\$203.44	\$163.85	\$238.52	\$132.72	\$120.38	\$25.00	\$135.33	\$600.00	\$262.42	\$195.23	\$212.75
	Median	\$0.00	\$50.00	\$0.00	\$50.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$50.00	\$0.00	\$22.00
GIFT/SOUV- F&F AT HOME	Mean	\$146.42	\$120.19	\$262.74	\$187.92	\$106.43	\$100.95	\$0.00	\$570.00	\$100.00	\$160.66	\$185.82	\$90.63
	Median	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$27.80	\$36.61	\$63.94	\$34.96	\$15.79	\$4.62	\$250.00	\$36.07	\$34.00	\$14.05	\$6.47	\$72.50
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$290.40	\$366.34	\$368.61	\$253.64	\$157.62	\$131.19	\$1,310.00	\$162.67	\$412.00	\$174.93	\$212.59	\$310.13
	Median	\$30.00	\$80.00	\$60.00	\$30.00	\$20.00	\$5.00	\$1,310.00	\$0.00	\$100.00	\$10.00	\$10.00	\$80.00

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# Total Expenditures - Tracking

YTD=\$1,162.30



# Total Expenditures Per Person - Segmentation

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP Mean	\$1,240.40	\$937.90	\$1,599.66	\$1,362.83	\$1,094.19	\$616.90	\$1,270.47	\$3,211.82	\$2,191.69	\$1,593.23	\$1,592.14	\$1,229.47
Median	1011.14	883.04	1010.35	1030.85	1120.62	583.23	1270.47	1192.99	1424.57	1564.48	1078.56	1105.48
Minimum	.00	.00	.00	.00	.00	.00	883.04	.00	759.21	.00	.00	400.00
Maximum	33868.44	4799.13	33868.44	33868.44	2184.57	1772.37	1657.90	33868.44	6298.27	6298.27	33868.44	2453.77

SECTION 4  
**ADVANCED STATISTICS**

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# 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, and Overall Oct-Dec 2009

	Oct-09	Nov-09	Dec-09	Combined Oct - Dec 2009
Independent Variables:	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	3	3
Ease of getting around				4
Safety walking around at night				
Quality of daytime tours	2	2	2	2
Variety of daytime tours	4			
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				
Variety of shopping				5
Price of things on Guam				
Quality of hotel accommodations	1	1	1	1
% of Overall Satisfaction Accounted For	43.7%	45.2%	44.0%	44.9%

NOTE: Only significant variables are ranked.

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# Drivers of Overall Satisfaction

- Overall satisfaction with the Korean visitor's experience on Guam is driven by three significant factors in the December 2009 Period by rank order they are):
  - Quality of hotel accommodations,
  - Quality of daytime tours, and
  - Cleanliness of beaches and parks.
- With all three factors the overall  $r^2$  is .44 meaning that 44.0% of overall satisfaction is accounted for by these three factors.

#:

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2009, and Overall Oct - Dec 2009

Independent Variables:	Oct-09 rank	Nov-09 rank	Dec-09 rank	Combined Oct - Dec 2009 rank
Cleanliness of beaches & parks				
Ease of getting around				
Safety walking around at night				
Quality of daytime tours			1	1
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations	1			
% of Overall Satisfaction Accounted For	1.5%	0.0%	2.3%	0.8%

NOTE: Only significant variables are ranked.



# Drivers of Per Person On Island Expenditure

- In the December 2009 period, there were only one significant driver of Korean visitor's Per person on-island expenditure, and that was quality of daytime tours. In December 2009, quality of daytime tours accounted for 2.3% of Korean visitors' per person on-island expenditure.