



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2013 Market Segmentation

DECEMBER 2012



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 **351** 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 **351** 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 Travelers
 - 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

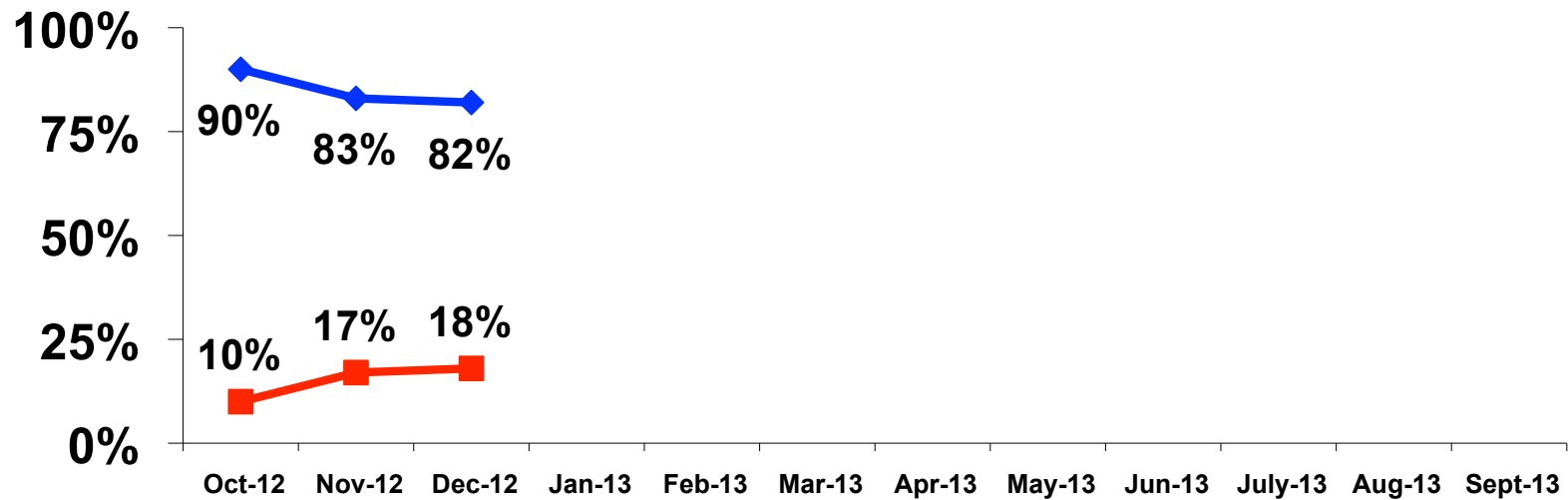
- Family/ FITs – Q.6/ Q.7
- Golden Miss - Female/ QF/ Q.25
- Group Travelers – Q.7
- English Language Tour – Q.18
- Honeymooner – Q.5
- Wedding – Q.5
- Special Interest Trvl – Q.5/ Q.18
- Incentive Market – Q.5/ Q.7
- 18-35 – Q.F
- 36-55 – Q.F
- Traveling with children – Q.6
- FITs – Q.7
- Seniors –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

Highlighted Segments

	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sept 13
Family/ FIT	7%	4%	5%									
Group	0%	-	-									
Eng Language	0%	-	-									
Honeymoon	30%	20%	11%									
Wedding	1%	1%	0%									
Incentive	3%	3%	2%									
18-35	63%	66%	47%									
36-55	35%	31%	47%									
Child	36%	33%	48%									
FIT	8%	8%	7%									
Golden Miss	4%	4%	5%									
Senior	1%	1%	1%									
Sport	33%	30%	33%									
TOTAL	351	351	350									

SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status Tracking

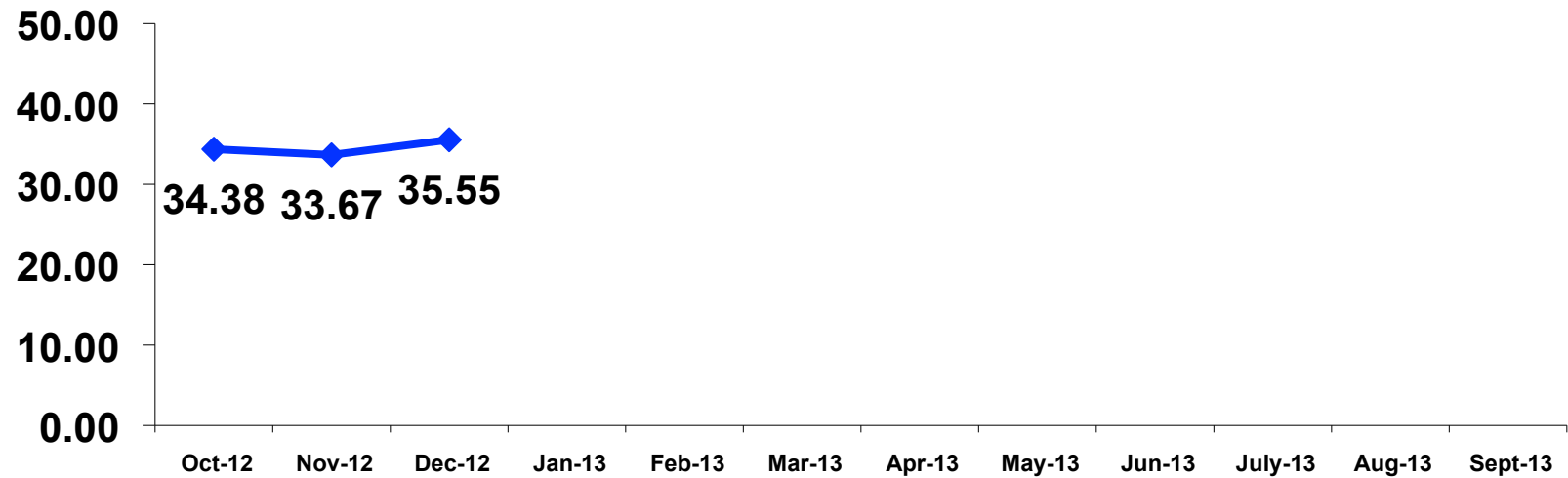


◆ Married ■ Single

Marital Status Segmentation

			TOTAL	FAMILY/ FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
			-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	Count	282	16	38	1	4	111	157	158	18	17	2	92
		Column N %	82%	94%	100%	100%	67%	67%	96%	97%	72%	94%	100%	81%
	Single	Count	63	1	0	0	2	54	6	5	7	1	0	22
		Column N %	18%	6%	0%	0%	33%	33%	4%	3%	28%	6%	0%	19%
Total		Count	345	17	38	1	6	165	163	163	25	18	2	114

Average Age Tracking



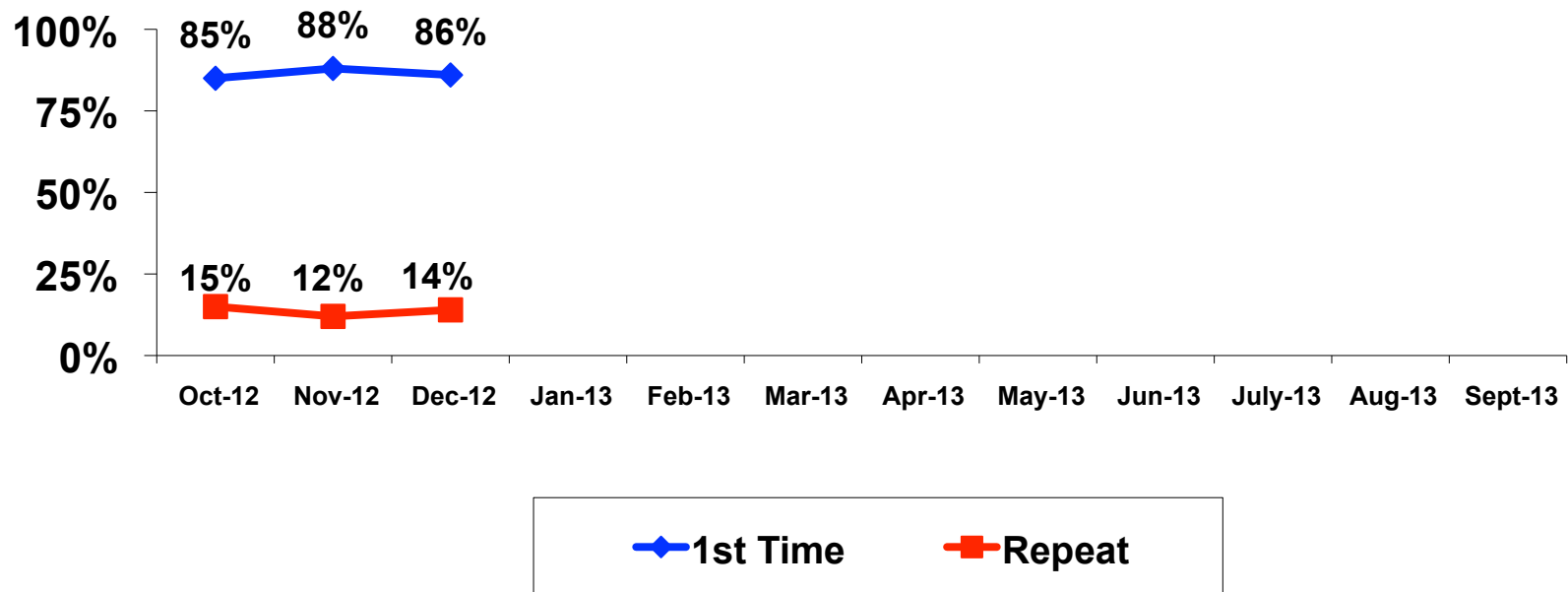
Age Segmentation

			TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
			-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	Count	17	1	0	0	2	17	0	2	1	0	0	6
		Column N %	5%	6%	0%	0%	33%	10%	0%	1%	4%	0%	0%	6%
	25-34	Count	132	5	33	0	1	132	0	28	9	4	0	43
		Column N %	40%	29%	89%	0%	17%	80%	0%	17%	36%	22%	0%	40%
	35-49	Count	168	10	4	1	3	16	152	126	13	14	0	51
		Column N %	51%	59%	11%	100%	50%	10%	92%	78%	52%	78%	0%	47%
	50+	Count	15	1	0	0	0	0	13	6	2	0	2	8
		Column N %	5%	6%	0%	0%	0%	0%	0%	8%	4%	8%	0%	100%
	Total	Count	332	17	37	1	6	165	165	162	25	18	2	108
QF	Mean		35.55	37.41	30.22	39.00	35.50	29.58	41.13	38.77	36.52	36.61	67.50	35.84
	Median		36	36	30	39	36	30	40	39	36	37	68	36

Income Segmentation

			TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
			-	-	-	-	-	-	-	-	-	-	-	-
Q26	<KW12.0M	Count	4	0	2	0	0	2	2	3	0	0	0	2
		Column N %	1%	0%	6%	0%	0%	1%	1%	2%	0%	0%	0%	2%
	KW12.0M-KW24.0M	Count	4	0	1	0	0	4	0	1	1	0	0	3
		Column N %	1%	0%	3%	0%	0%	3%	0%	1%	5%	0%	0%	3%
	KW24.0M-KW36.0M	Count	25	0	10	0	2	22	3	5	0	2	0	9
		Column N %	9%	0%	31%	0%	33%	16%	2%	3%	0%	12%	0%	9%
	KW36.0M-KW48.0M	Count	36	0	7	0	0	23	12	10	1	0	0	10
		Column N %	13%	0%	22%	0%	0%	17%	8%	7%	5%	0%	0%	10%
	KW48.0M-KW60.0M	Count	73	5	5	1	0	38	31	30	7	5	0	17
		Column N %	25%	33%	16%	100%	0%	28%	22%	21%	35%	29%	0%	18%
	KW60.0M-KW72.0M	Count	42	0	1	0	2	11	27	23	0	2	1	11
		Column N %	15%	0%	3%	0%	33%	8%	19%	16%	0%	12%	100%	11%
	KW72.0M+	Count	101	10	6	0	2	32	67	71	11	8	0	43
		Column N %	35%	67%	19%	0%	33%	24%	47%	50%	55%	47%	0%	44%
	No Income	Count	2	0	0	0	0	2	0	0	0	0	0	2
		Column N %	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	2%
Total		Count	287	15	32	1	6	134	142	143	20	17	1	97

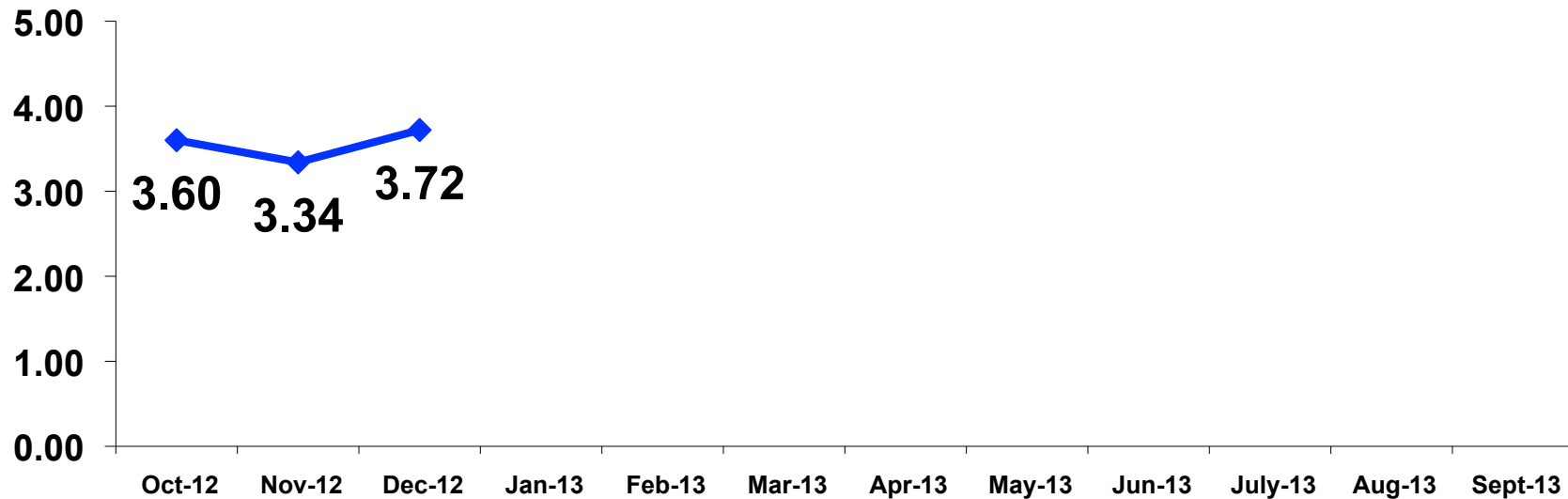
Prior Trips To Guam Tracking



Prior Trips To Guam Segmentation

			TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
			-	-	-	-	-	-	-	-	-	-	-	-
Q3A	Yes	Count	295	2	36	1	4	147	133	136	8	16	2	98
		Column N %	86%	11%	97%	100%	67%	92%	82%	83%	31%	89%	100%	88%
	No	Count	47	16	1	0	2	13	30	28	18	2	0	14
		Column N %	14%	89%	3%	0%	33%	8%	18%	17%	69%	11%	0%	13%
	Total	Count	342	18	37	1	6	160	163	164	26	18	2	112

Average Length of Stay Tracking



Average Length of Stay Segmentation

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	3.72	4.61	3.58	3.00	3.50	4.01	3.48	3.42	5.23	3.39	3.00	4.17
	Median	3	4	4	3	4	3	3	3	4	3	3	3

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

			TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
			-	-	-	-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	170	0	28	0	5	68	92	96	0	10	2	54
		Column N %	49%	0%	74%	0%	83%	41%	56%	58%	0%	56%	100%	46%
	Free-time package tour	Count	151	0	9	1	1	84	58	60	0	6	0	54
		Column N %	43%	0%	24%	100%	17%	51%	35%	36%	0%	33%	0%	46%
	Individually arranged travel (FIT)	Count	26	18	1	0	0	11	14	10	26	2	0	9
		Column N %	7%	100%	3%	0%	0%	7%	9%	6%	100%	11%	0%	8%
	Other	Count	1	0	0	0	0	1	0	0	0	0	0	0
		Column N %	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
	Total	Count	348	18	38	1	6	164	164	166	26	18	2	117

Travel Motivation Segmentation

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	8%	56%	3%	0%	33%	6%	11%	12%	38%	11%	0%	9%	
	Price	13%	11%	8%	0%	0%	13%	12%	8%	8%	11%	0%	12%	
	Visit friends/ Relatives	5%	17%	0%	0%	0%	4%	5%	5%	15%	0%	0%	5%	
	Recomm- friend/family/trvl agnt	23%	6%	5%	0%	33%	18%	28%	28%	8%	28%	0%	21%	
	Scuba	2%	6%	0%	0%	0%	2%	1%	2%	8%	0%	0%	6%	
	Water sports	13%	17%	3%	0%	17%	15%	12%	15%	15%	33%	0%	38%	
	Short travel time	26%	22%	21%	0%	33%	33%	21%	25%	27%	11%	0%	26%	
	Golf	3%	6%	0%	0%	0%	2%	4%	3%	4%	6%	0%	9%	
	Relax	71%	61%	63%	0%	100%	67%	74%	73%	54%	89%	50%	67%	
	Company/ Business Trip	0%	0%	0%	0%	0%	0%	1%	0%	4%	0%	0%	0%	
	Company Sponsored	2%	0%	0%	0%	100%	2%	2%	2%	0%	0%	0%	1%	
	Convention/ Trade/ Conference	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	
	Safe	27%	17%	13%	0%	83%	27%	28%	34%	12%	44%	0%	27%	
	Natural beauty	53%	67%	24%	0%	67%	53%	52%	50%	65%	44%	0%	58%	
	Shopping	25%	39%	18%	0%	83%	34%	15%	17%	38%	17%	0%	17%	
	Manied/ Attn wedding	0%	0%	0%	100%	0%	0%	1%	0%	0%	0%	0%	1%	
	Honeymoon	11%	6%	100%	0%	0%	21%	2%	1%	4%	0%	0%	12%	
	Pleasure	12%	22%	8%	0%	33%	15%	8%	10%	23%	6%	100%	14%	
	Organized sports	1%	0%	0%	0%	0%	2%	1%	2%	0%	0%	0%	3%	
	Other	0%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	0%	
	Total	Count	349	18	38	1	6	164	165	166	26	18	2	117

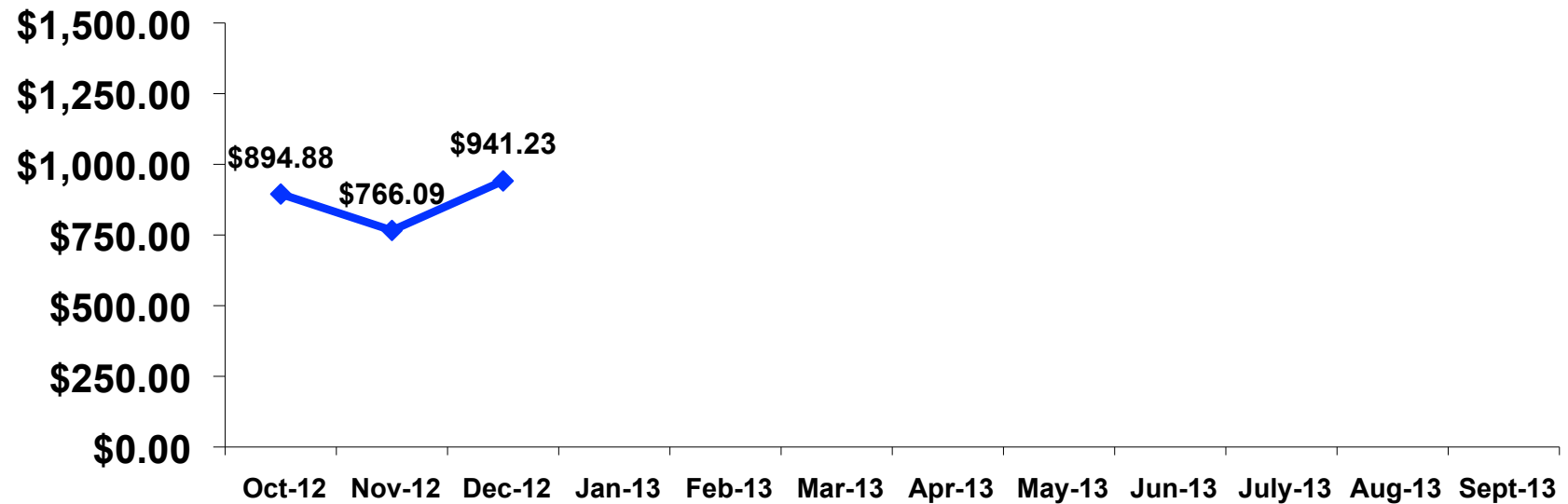
Information Sources Segmentation

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	91%	83%	95%	100%	83%	93%	91%	92%	85%	100%	100%	93%	
	Friend/ Relative	44%	44%	50%	100%	17%	43%	44%	42%	50%	39%	0%	39%	
	Travel Agent Brochure	35%	0%	58%	0%	33%	33%	39%	41%	0%	39%	0%	40%	
	Prior Trip	13%	78%	3%	0%	33%	7%	17%	16%	62%	11%	0%	11%	
	Travel Guidebook-Bookstore	12%	22%	18%	0%	0%	14%	9%	8%	19%	6%	0%	11%	
	TV	9%	6%	3%	100%	0%	7%	10%	7%	8%	11%	0%	12%	
	GVB Office	9%	6%	5%	0%	0%	12%	7%	5%	4%	6%	0%	13%	
	Co-Worker/ Company Trvl Dept	6%	0%	5%	0%	50%	6%	7%	8%	0%	0%	0%	5%	
	GVB Promo	5%	6%	3%	0%	0%	3%	6%	7%	4%	11%	0%	4%	
	Magazine (Consumer)	3%	11%	13%	0%	0%	3%	4%	3%	8%	6%	0%	2%	
	Consumer Trvl Show	1%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	
	Newspaper	0%	6%	0%	0%	0%	1%	0%	1%	4%	0%	0%	1%	
	Total	Count	347	18	38	1	6	165	165	166	26	18	1	115

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

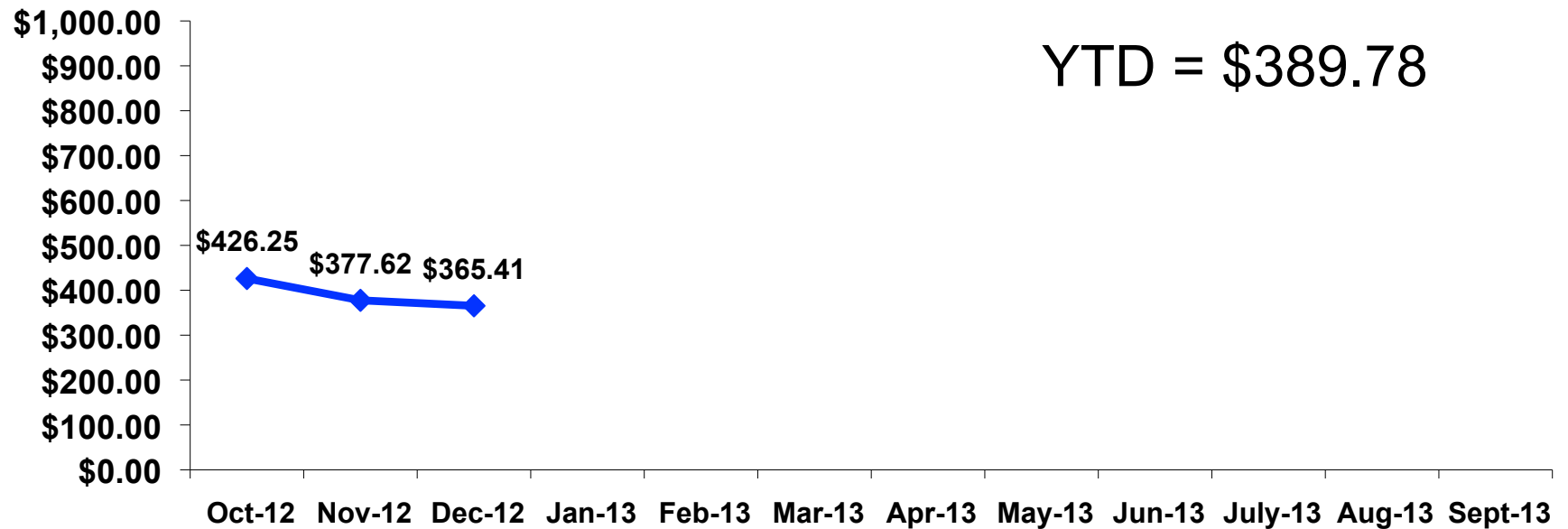
YTD=\$867.40



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$941.23	\$895.35	\$1,088.96	\$934.73	\$1,389.27	\$972.93	\$935.43	\$930.21	\$891.04	\$985.01	\$0.00	\$958.06
	Median	\$935	\$923	\$1,215	\$935	\$1,458	\$935	\$935	\$935	\$876	\$935	\$0	\$981
	Minimum	\$0	\$0	\$0	\$935	\$997	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,804	\$1,869	\$2,804	\$935	\$1,533	\$2,804	\$2,103	\$2,103	\$1,869	\$2,103	\$0	\$2,430

On-Island Expenditures Tracking



On-Island Expenditures Per Person Segmentation

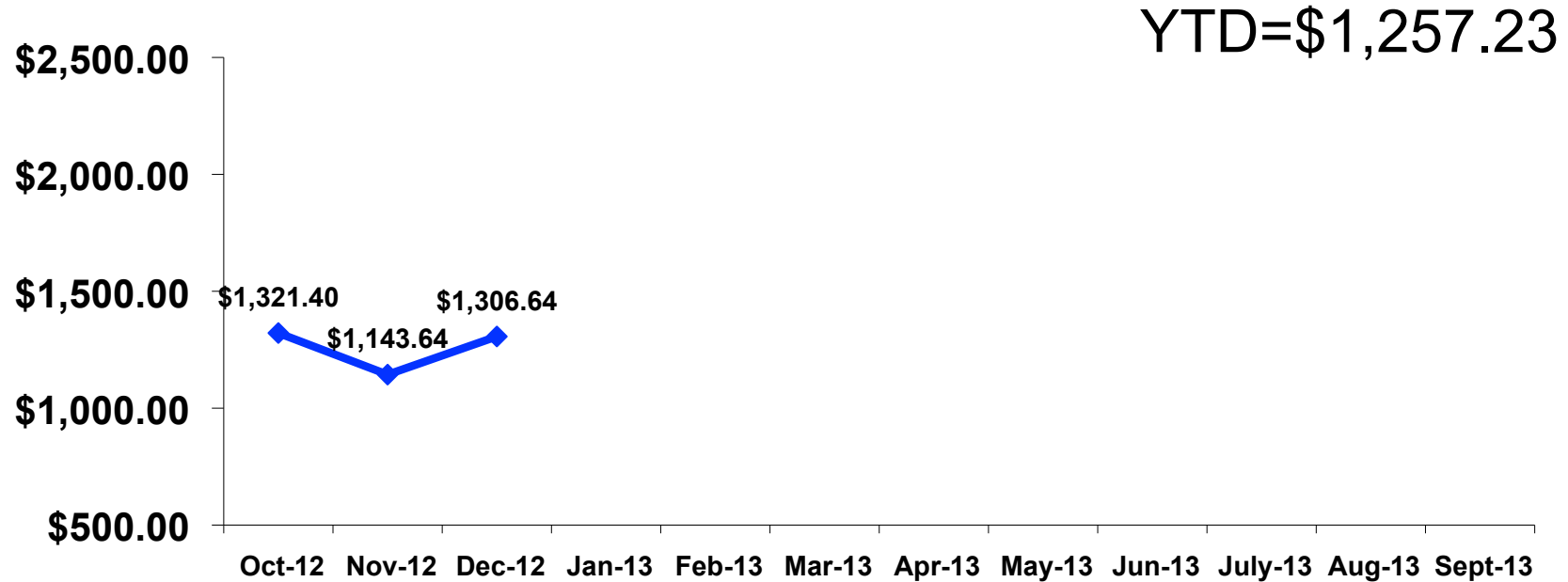
		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$365.41	\$280.58	\$458.80	\$1,000.00	\$1,057.33	\$465.31	\$289.44	\$228.19	\$385.93	\$183.71	\$0.00	\$395.71
	Median	\$235	\$183	\$475	\$1,000	\$848	\$290	\$167	\$167	\$200	\$133	\$0	\$243
	Minimum	\$0	\$0	\$0	\$1,000	\$67	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$4,000	\$1,000	\$1,400	\$1,000	\$3,040	\$3,040	\$4,000	\$1,800	\$3,000	\$1,065	\$0	\$4,000



On-Island Expense Breakdown

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
AIR & HOTEL	Mean	\$2,036.84	\$2,467.68	\$2,972.43	\$934.73		\$1,845.99	\$2,214.10	\$2,770.56	\$1,747.94	\$2,617.24		\$2,227.97
	Median	\$1,785	\$2,150	\$2,944	\$935		\$1,683	\$1,869	\$2,804	\$1,589	\$2,477		\$1,869
	Minimum	\$369	\$1,496	\$1,795	\$935		\$467	\$369	\$369	\$561	\$935		\$369
	Maximum	\$5,608	\$4,206	\$4,206	\$935		\$5,608	\$5,328	\$5,328	\$4,206	\$4,206		\$4,674
AIR/ HOTEL/ MEAL	Mean	\$3,298.44	\$3,349.44	\$2,841.57		\$2,399.29	\$2,573.54	\$3,931.11	\$3,898.21	\$3,349.44	\$4,060.87		\$3,252.80
	Median	\$2,804	\$3,505	\$2,804		\$1,533	\$2,430	\$3,739	\$3,739	\$3,505	\$3,739		\$2,804
	Minimum	\$374	\$935	\$1,066		\$1,402	\$374	\$935	\$374	\$935	\$1,122		\$935
	Maximum	\$20,564	\$5,608	\$4,206		\$5,421	\$8,413	\$20,564	\$20,564	\$5,608	\$8,413		\$10,282
AIR ONLY	Mean	\$1,087.36	\$1,659.14	\$1,308.62			\$933.54	\$1,651.35	\$1,869.46	\$1,194.18	\$2,149.87		\$1,099.45
	Median	\$861	\$1,496	\$1,309			\$695	\$1,683	\$1,916	\$1,122	\$2,150		\$1,122
	Minimum	\$374	\$1,122	\$1,309			\$374	\$1,122	\$1,122	\$374	\$2,150		\$374
	Maximum	\$2,524	\$2,524	\$1,309			\$2,524	\$2,150	\$2,524	\$2,524	\$2,150		\$2,150
HOTEL ONLY	Mean												
	Median												
	Minimum												
	Maximum												
HOTEL & MEAL	Mean	\$1,238.51	\$794.52				\$981.46	\$1,495.56	\$1,370.93	\$794.52	\$2,523.77		\$1,495.56
	Median	\$981	\$795				\$981	\$1,496	\$1,122	\$795	\$2,524		\$1,496
	Minimum	\$467	\$467				\$841	\$467	\$467	\$467	\$2,524		\$467
	Maximum	\$2,524	\$1,122				\$1,122	\$2,524	\$2,524	\$1,122	\$2,524		\$2,524
F&B HOTEL	Mean	\$327.15					\$186.95	\$467.36	\$467.36	\$186.95			\$327.15
	Median	\$327					\$187	\$467	\$467	\$187			\$327
	Minimum	\$187					\$187	\$467	\$467	\$187			\$187
	Maximum	\$467					\$187	\$467	\$467	\$187			\$467
TRANS- KOREA	Mean	\$112.17						\$112.17	\$112.17				
	Median	\$112						\$112	\$112				
	Minimum	\$112						\$112	\$112				
	Maximum	\$112						\$112	\$112				
TRANS- GUAM	Mean	\$121.51					\$121.51						
	Median	\$122					\$122						
	Minimum	\$122					\$122						
	Maximum	\$122					\$122						
OPT TOURS	Mean	\$84.13	\$93.47	\$93.47			\$93.47	\$74.78	\$74.78	\$93.47			\$93.47
	Median	\$84	\$93	\$93			\$93	\$75	\$75	\$93			\$93
	Minimum	\$75	\$93	\$93			\$93	\$75	\$75	\$93			\$93
	Maximum	\$93	\$93	\$93			\$93	\$75	\$75	\$93			\$93
OTHER	Mean	\$313.13		\$93.47			\$313.13						\$93.47
	Median	\$313		\$93			\$313						\$93
	Minimum	\$93		\$93			\$93						\$93
	Maximum	\$533		\$93			\$533						\$93
TOTAL	Mean	\$2,278.12	\$2,264.12	\$2,072.14	\$934.73	\$2,399.29	\$1,880.75	\$2,737.50	\$2,991.90	\$1,838.65	\$3,162.50	\$0.00	\$2,264.54
	Median	\$1,869	\$1,916	\$2,430	\$935	\$1,533	\$1,776	\$2,421	\$2,804	\$1,542	\$3,412	\$0	\$1,869
	Minimum	\$0	\$0	\$0	\$935	\$1,402	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$20,564	\$5,608	\$4,206	\$935	\$5,421	\$8,413	\$20,564	\$20,564	\$5,608	\$8,413	\$0	\$10,282

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY/FIT	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,306.64	\$1,175.93	\$1,547.76	\$1,934.73	\$2,446.60	\$1,438.24	\$1,224.87	\$1,158.40	\$1,276.96	\$1,168.72	\$0.00	\$1,353.77
	Median	\$1,285	\$1,256	\$1,772	\$1,935	\$2,372	\$1,418	\$1,246	\$1,201	\$1,256	\$1,168	\$0	\$1,315
	Minimum	\$0	\$0	\$0	\$1,935	\$1,064	\$0	\$0	\$0	\$0	\$75	\$0	\$0
	Maximum	\$4,981	\$2,369	\$3,054	\$1,935	\$4,442	\$4,442	\$4,981	\$3,669	\$3,695	\$2,174	\$0	\$4,981

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 2012, and Overall Oct-Dec 2012				
	Oct-12	Nov-12	Dec-12	Combined Oct-Dec 2012
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks	3	1		4
Ease of getting around				
Safety walking around at night				8
Quality of daytime tours	5		1	
Variety of daytime tours				5
Quality of nighttime tours				
Variety of nighttime tours				
Quality of shopping				
Variety of shopping			5	7
Price of things on Guam		3		
Quality of hotel accommodations	1		4	1
Quality/cleanliness of air, sky			3	6
Quality/cleanliness of parks				
Quality of landscape in Tumon				
Quality of landscape in Guam	2	4	6	2
Quality of ground handler			2	
Quality/cleanliness of transportation vehicles	4	2		3
% of Per Person On Island Expenditures Accounted For	50.4%	49.2%	64.7%	54.0%
NOTE: Only significant drivers are included.				

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by six significant factors in the December 2012 Period. By rank order they are:
 - **Quality of day time tours,**
 - **Quality of ground handler,**
 - **Quality/cleanliness of air, sky,**
 - **Quality of hotel accommodations,**
 - **Variety of shopping, and**
 - **Quality of landscape on Guam.**
- With all six factors the overall r^2 is .647 meaning that **64.7% of overall satisfaction is accounted for by these six factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct,Nov,Dec 2012, and Overall Oct-Dec 2012				
	Oct-12	Nov-12	Dec-12	Combined Oct-Dec 2012
Drivers:	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks				
Ease of getting around				
Safety walking around at night				
Quality of daytime tours				
Variety of daytime tours				
Quality of nighttime tours				
Variety of nighttime tours				2
Quality of shopping				1
Variety of shopping				
Price of things on Guam				
Quality of hotel accommodations				
Quality/cleanliness of air, sky				
Quality/cleanliness of parks				
Quality of landscape in Tumon		1		
Quality of landscape in Guam				
Quality of ground handler				
Quality/cleanliness of transportation vehicles				
% of Per Person On Island Expenditures Accounted For	0.0%	2.6%	0.0%	1.6%

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 no significant factors in the December 2012 Period.