



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2011 MARKET SEGMENTATION –

MAY 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 **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

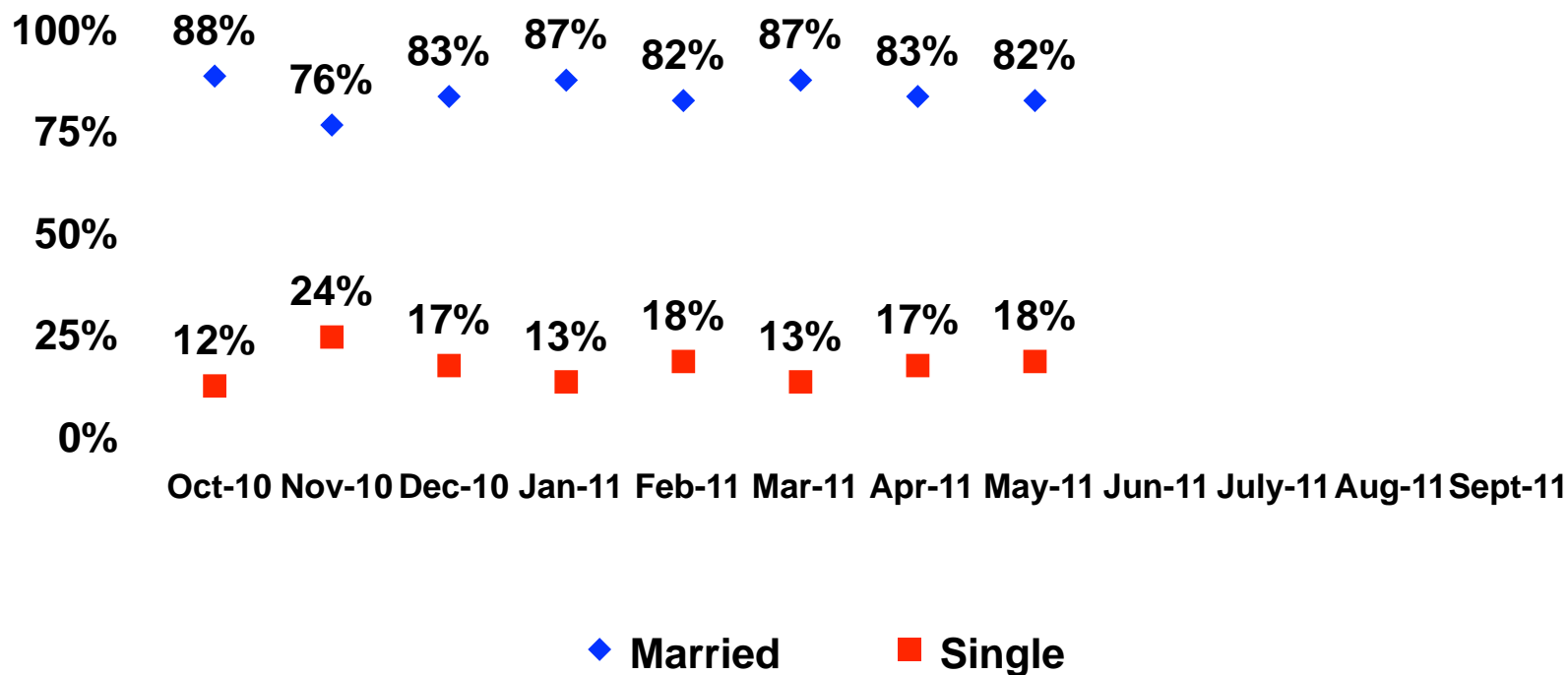
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 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%				
Repeaters	14%	17%	18%	12%	23%	16%	16%	19%				
Shoppers	54%	62%	57%	56%	53%	61%	62%	64%				
Seniors	4%	5%	6%	9%	6%	5%	3%	5%				
OL/Salary woman	10%	11%	16%	7%	9%	12%	16%	15%				
Group Travelers	5%	6%	2%	3%	1%	1%	1%	1%				
Students	1%	2%	2%	1%	1%	1%	2%	2%				
Golfers	5%	7%	9%	8%	8%	4%	5%	5%				
Wedding	1%	1%	1%	1%	0%	1%	1%	0%				
Divers	17%	24%	17%	18%	16%	14%	18%	17%				
Honey- mooners	25%	13%	28%	16%	7%	38%	31%	19%				
TOTAL	353	352	354	353	353	353	353	352				

SECTION 1 **PROFILE OF RESPONDENTS**

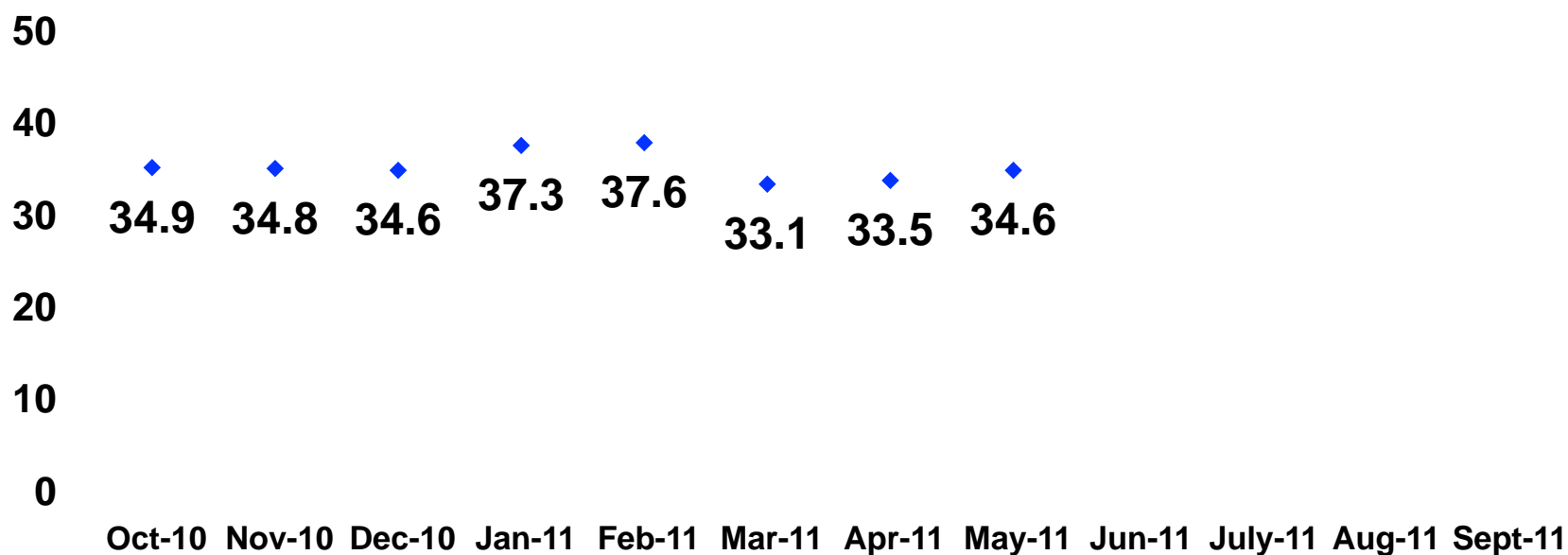
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	289	145	53	187	36	2	5	17	1	64	52	16
		Col %	82%	94%	78%	83%	69%	100%	83%	89%	100%	98%	90%	100%
	Single	Count	63	10	15	38	16		1	2		1	6	
		Col %	18%	6%	22%	17%	31%		17%	11%		2%	10%	
Total	Count		352	155	68	225	52	2	6	19	1	65	58	16

Average Age Tracking



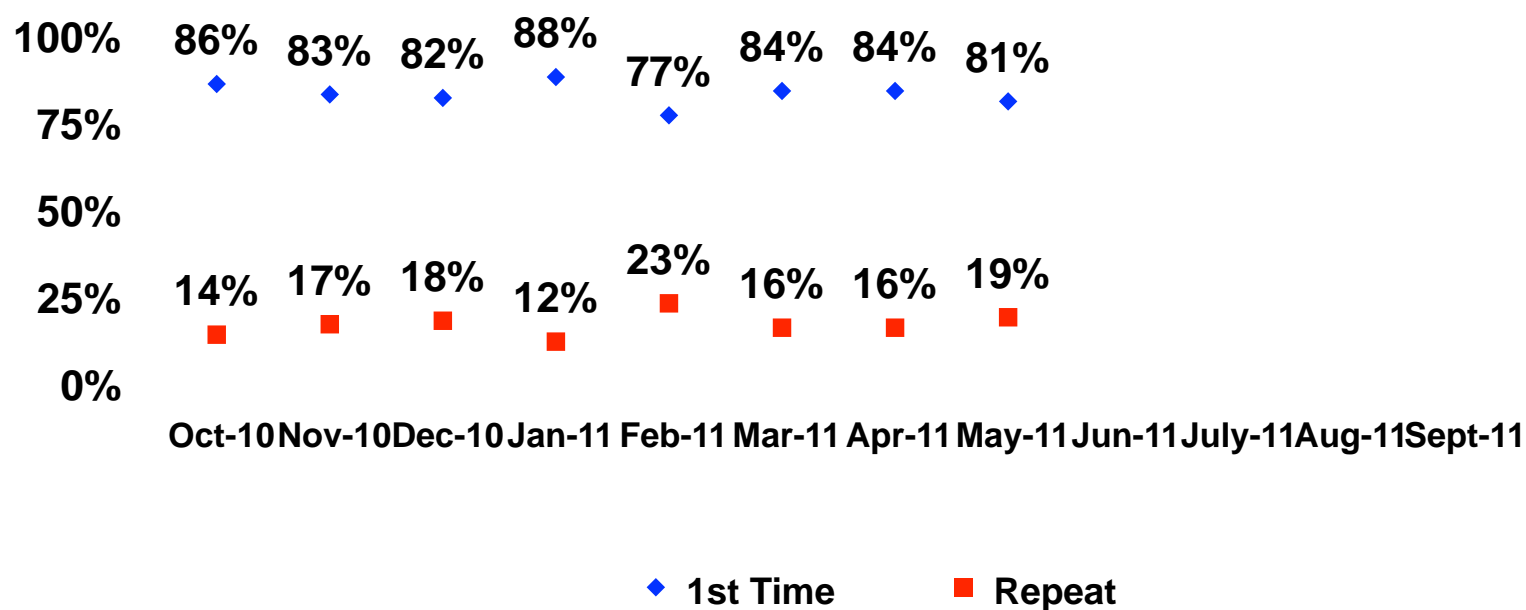
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	193	50	26	133	41		4	9	1	58	34	
		Col %	55%	32%	38%	59%	79%		67%	47%	100%	89%	59%	
	35-54	Count	151	102	39	86	11	1	2	9		7	23	8
		Col %	43%	66%	57%	38%	21%	50%	33%	47%		11%	40%	50%
	55+	Count	8	3	3	6		1		1			1	8
		Col %	2%	2%	4%	3%		50%		5%			2%	50%
Total	Count		352	155	68	225	52	2	6	19	1	65	58	16
C	Mean		34.6	36.9	37.5	34.1	30.9	46.0	32.7	36.7	27.0	30.7	34.3	54.3
	Median		34	37	37	33	30	46	33	35	27	30	33	55

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count	6	1		3	1		1			3		
		Col %	2%	1%		1%	2%		17%			5%		
	KW12M-KW24M	Count	19	3	1	12	4	1				7	5	
		Col %	5%	2%	1%	5%	8%	50%				11%	9%	
	KW24M-KW36M	Count	44	5	3	29	11					19	12	2
		Col %	13%	3%	4%	13%	21%					29%	21%	13%
	KW36M-KW48M	Count	58	24	11	40	7		1	5	1	11	11	4
		Col %	17%	16%	16%	18%	13%		17%	26%	100%	17%	19%	25%
	KW48M-KW60M	Count	49	25	5	34	7	1		3		11	4	3
		Col %	14%	16%	7%	15%	13%	50%		16%		17%	7%	19%
	KW60M-KW72M	Count	41	25	9	24	8			1		4	9	
		Col %	12%	16%	13%	11%	15%			5%		6%	16%	
	KW72M+	Count	116	67	36	72	14			8		7	15	7
		Col %	34%	44%	53%	32%	27%			42%		11%	26%	44%
	No Income	Count	13	3	3	8			4	2		3	1	
		Col %	4%	2%	4%	4%			67%	11%		5%	2%	
Total	Count		346	153	68	222	52	2	6	19	1	65	57	16

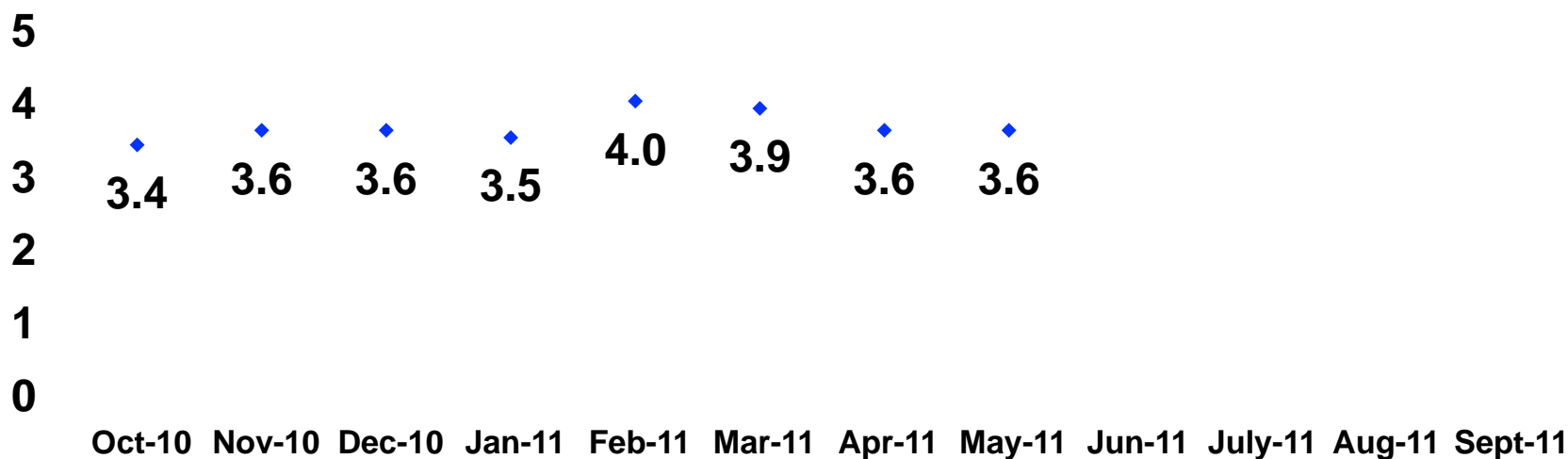
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	284	118		192	43	2	5	12	1	63	53	10
		Col %	81%	76%		85%	83%	100%	83%	63%	100%	97%	91%	63%
	No	Count	68	37	68	33	9		1	7		2	5	6
		Col %	19%	24%	100%	15%	17%		17%	37%		3%	9%	38%
Total	Count		352	155	68	225	52	2	6	19	1	65	58	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	3.6	3.5	3.6	3.7	3.5	3.5	3.3	5.5	4.0	3.4	3.6	3.6
Median	3	3	3	3	3	4	3	4	4	3	3	4
Minimum	1	2	2	2	2	3	3	3	4	3	3	2
Maximum	21	18	18	21	7	4	4	21	4	7	10	5

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	178	85	19	116	17		4	11	1	52	42	5
		Col %	51%	55%	28%	52%	33%		67%	58%	100%	80%	72%	31%
	Free-time package tours	Count	124	53	32	86	28		1	4		13	13	5
		Col %	35%	34%	47%	38%	54%		17%	21%		20%	22%	31%
	Individually arranged travel	Count	39	14	16	15	7		1	2			1	2
		Col %	11%	9%	24%	7%	13%		17%	11%			2%	13%
	Group tour	Count	2	1		2		2					1	1
		Col %	1%	1%		1%		100%					2%	6%
	Other	Count	4	2	1	3				1				1
		Col %	1%	1%	1%	1%				5%				6%
	Company paid travel	Count	5			3				1			1	2
		Col %	1%			1%				5%			2%	13%
Total	Count		352	155	68	225	52	2	6	19	1	65	58	16

Travel Motivation Segmentation

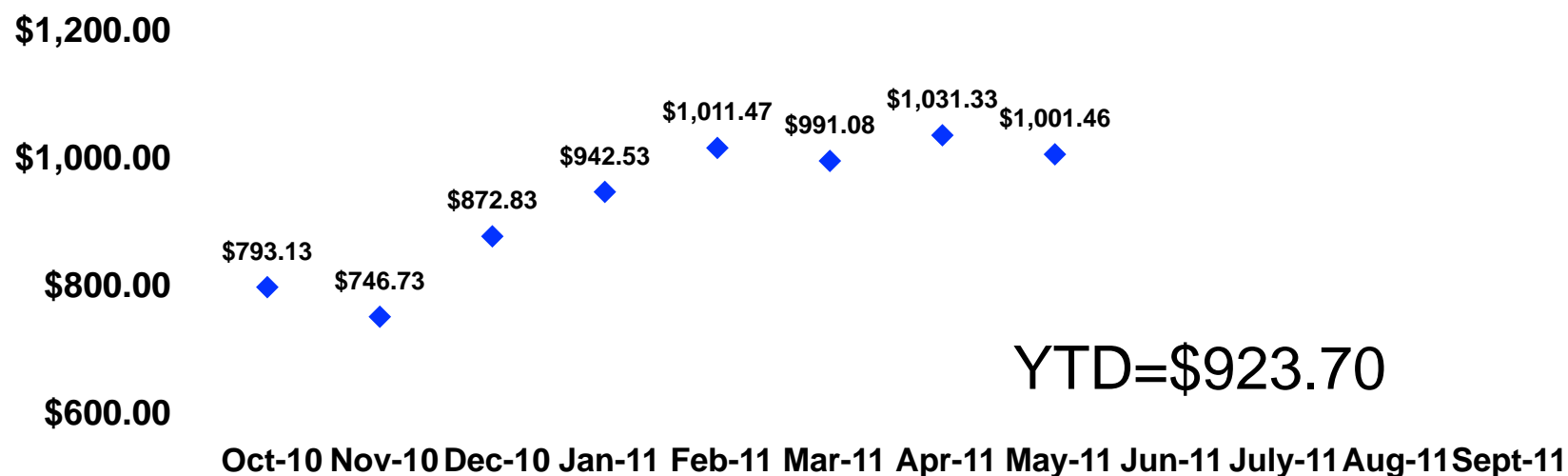
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	59%	71%	51%	60%	62%	100%	50%	53%	100%	34%	42%	50%
	Beautiful seas, beaches, tropical climate	40%	45%	28%	40%	54%	50%	33%	26%		35%	46%	19%
	Short travel time	31%	40%	36%	32%	44%			21%		17%	21%	25%
	It is a safe place to spend a vacation	25%	33%	34%	22%	21%		17%	21%		14%	14%	25%
	Honeymoon	19%	1%	3%	23%	23%		33%	5%		100%	42%	
	Recommendation of friend, relative, travel agency	18%	19%	10%	22%	21%			21%		20%	16%	13%
	Shopping	18%	16%	19%	23%	17%		17%	11%		18%	9%	13%
	A previous visit	8%	14%	43%	7%	6%			21%		2%	5%	19%
	Pleasure	9%	12%	18%	7%	12%		17%	11%		5%	5%	
	Water sports	7%	10%	4%	7%	6%		17%	11%		3%	19%	6%
	Price of the tour package	5%	6%	6%	4%	2%		17%			3%		6%
	To golf	3%	4%	7%	2%				58%			2%	6%
	Career certification or testing	5%	1%	15%	4%	6%							
	SCUBA diving	2%	1%		3%						5%	12%	
	To visit friends or relatives	2%	1%	10%	1%	4%			5%			2%	13%
	Other	2%	2%	7%	2%	2%			11%				
	Company or Business trip	2%			2%	2%			5%		2%		
	Organized Sporting Activity	1%	2%	1%	1%							2%	
	My company sponsored me	1%	1%		1%		50%					2%	
	Promotional materials from GVB	1%	1%		1%				5%			2%	
	To get married or Attend wedding	0%			0%					100%			
Total	Cases	351	154	67	225	52	2	6	19	1	65	57	16

Information Sources Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	83%	86%	75%	85%	88%	100%	67%	74%	100%	78%	81%	56%
	Travel agent brochure	41%	39%	24%	41%	35%		67%	47%	100%	58%	50%	38%
	Friend or relative	23%	17%	19%	27%	23%		33%	37%	100%	28%	19%	25%
	I have been to Guam before	19%	24%	100%	15%	17%		17%	37%		3%	9%	38%
	Company travel department	15%	14%	6%	14%	33%	50%		5%		28%	24%	
	TV	12%	11%	9%	12%	6%			5%		15%	17%	31%
	Guam promo activities	11%	10%	4%	12%	21%			5%		9%	5%	6%
	Travel guide book at bookstores	9%	10%	1%	9%	10%			11%		5%	3%	6%
	Magazine	2%	3%	3%	2%	2%					2%	2%	
	Newspaper	2%	1%	1%	2%	2%					3%		
	Pod casts	0%		1%				17%					
Total	Cases	352	155	68	225	52	2	6	19	1	65	58	16

SECTION 3 **EXPENDITURES**

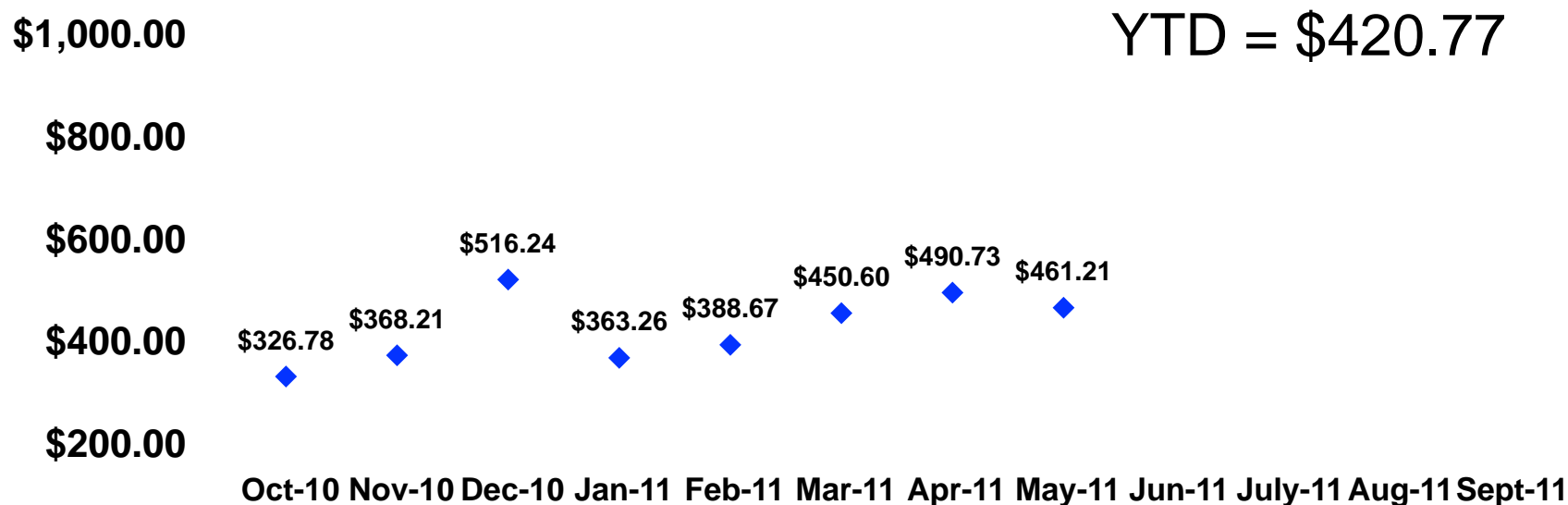
Prepaid Expenditures Tracking



Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$1,001.46	\$959.38	\$943.48	\$1,025.06	\$1,136.15	\$1,304.81	\$931.46	\$746.59	\$1,662.77	\$1,284.03	\$1,104.96	\$1,431.54
	Median	\$977	\$924	\$835	\$998	\$1,113	\$1,305	\$993	\$831	\$1,663	\$1,478	\$1,070	\$961
	Minimum	\$.00	\$.00	\$.00	\$.00	\$.00	\$1,223.98	\$.00	\$.00	\$1,662.77	\$.00	\$.00	\$.00
	Maximum	\$11,085.14	\$11,085.14	\$11,085.14	\$11,085.14	\$3,094.60	\$1,385.64	\$1,755.15	\$1,847.52	\$1,662.77	\$3,094.60	\$3,094.60	\$11,085.14

On-Island Expenditures Tracking



On-Island Expenditures Per Person Segmentation

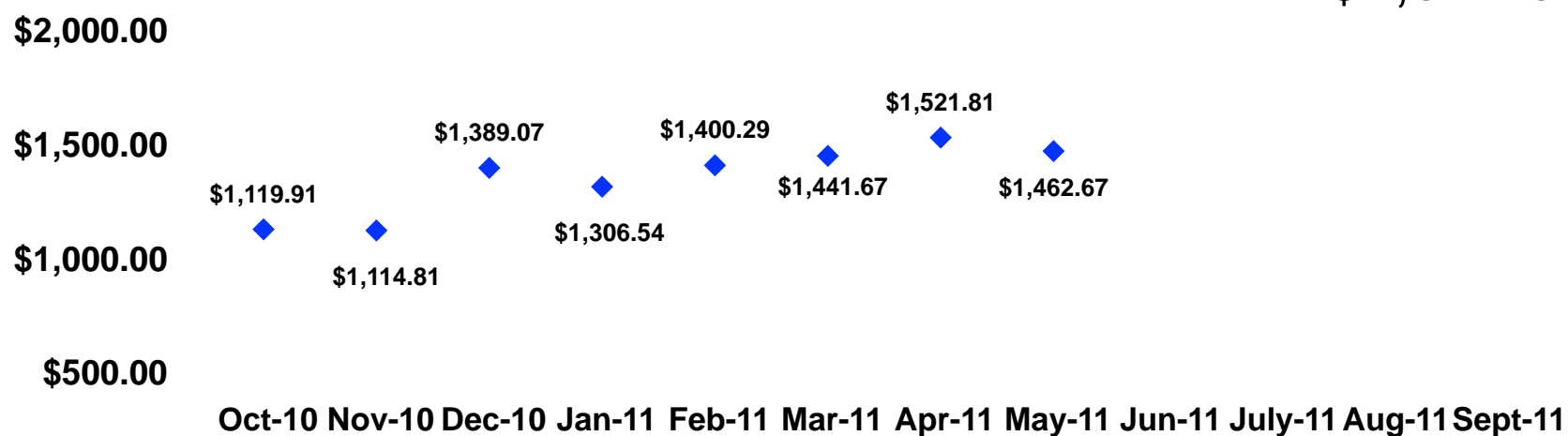
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$461.21	\$323.74	\$408.13	\$504.30	\$384.45	\$890.00	\$488.33	\$671.32	\$500.00	\$706.44	\$568.80	\$465.95
	Median	\$300	\$241	\$323	\$333	\$300	\$890	\$275	\$500	\$500	\$450	\$307	\$436
	Minimum	\$.00	\$.00	\$.00	\$.00	\$.00	\$280.00	\$.00	\$.00	\$500.00	\$.00	\$.00	\$.00
	Maximum	\$3,710.00	\$2,010.00	\$2,010.00	\$3,710.00	\$1,705.00	\$1,500.00	\$2,000.00	\$2,500.00	\$500.00	\$3,150.00	\$2,250.00	\$1,500.00

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$62.57	\$82.88	\$103.07	\$60.88	\$33.90	\$0.00	\$26.67	\$195.79	\$0.00	\$36.49	\$15.50	\$15.00
	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	Mean	\$38.70	\$37.98	\$75.44	\$32.39	\$38.65	\$5.00	\$28.33	\$100.00	\$0.00	\$30.42	\$17.17	\$134.38
REST/CONV	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE	Mean	\$65.86	\$55.16	\$136.76	\$64.33	\$70.83	\$0.00	\$1.67	\$105.26	\$100.00	\$21.54	\$34.91	\$200.00
HOTEL/ REST	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00
OPTIONAL	Mean	\$126.16	\$135.83	\$106.84	\$112.29	\$132.79	\$85.00	\$65.00	\$108.95	\$300.00	\$136.94	\$225.41	\$253.13
TOUR	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$85.00	\$0.00	\$0.00	\$300.00	\$75.00	\$131.50	\$0.00
GIFT/	Mean	\$337.31	\$355.50	\$376.25	\$363.93	\$222.88	\$50.00	\$16.67	\$371.05	\$600.00	\$512.05	\$385.79	\$68.75
SOUV-SELF	Median	\$12.00	\$80.00	\$0.00	\$88.00	\$0.00	\$50.00	\$0.00	\$0.00	\$600.00	\$100.00	\$80.00	\$0.00
GIFT/ SOUV-	Mean	\$141.80	\$138.30	\$161.25	\$136.71	\$112.63	\$0.00	\$20.00	\$97.37	\$0.00	\$243.15	\$192.71	\$81.25
F&F AT HOME	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$44.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$32.22	\$39.96	\$42.88	\$36.89	\$32.33	\$0.00	\$20.00	\$82.37	\$0.00	\$15.60	\$14.00	\$3.13
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$343.49	\$341.48	\$380.21	\$364.76	\$245.06	\$750.00	\$351.67	\$720.53	\$0.00	\$396.62	\$344.93	\$484.38
	Median	\$20.00	\$70.00	\$0.00	\$39.00	\$6.50	\$750.00	\$30.00	\$0.00	\$0.00	\$0.00	\$20.00	\$275.00

Total Expenditures Tracking

YTD=\$1,344.57



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,462.67	\$1,283.12	\$1,351.61	\$1,529.36	\$1,520.60	\$2,194.81	\$1,419.79	\$1,417.91	\$2,162.77	\$1,990.47	\$1,673.77	\$1,897.50
	Median	1321.45	1228.37	1189.76	1354.70	1459.45	2194.81	1362.33	1395.35	2162.77	1922.01	1628.13	1307.10
	Minimum	.00	.00	.00	.00	.00	1503.98	.00	.00	2162.77	.00	.00	.00
	Maximum	11085.14	11085.14	11085.14	11085.14	3921.65	2885.64	2969.95	3331.39	2162.77	4997.52	3849.47	11085.14

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.

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Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2010, Jan, Feb, Mar, Apr, May 2011 and Overall Oct 2010 - May 2011

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Combined Oct 2010 - May 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	3	3	2	4	3		3	2	3
Ease of getting around				2	4				6
Safety walking around at night									
Quality of daytime tours		1				3	1		2
Variety of daytime tours	2		4	5	2	2		3	5
Quality of nighttime tours						4	5		7
Variety of nighttime tours									
Quality of shopping			3	3			4	4	4
Variety of shopping				6					
Price of things on Guam									8
Quality of hotel accommodations	1	2	1	1	1	1	2	1	1
% of Overall Satisfaction Accounted For	54.5%	38.5%	57.9%	50.4%	53.7%	43.6%	42.9%	47.5%	47.9%

NOTE: Only significant variables are ranked.

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by four significant factors in the May 2011 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Cleanliness of beaches & parks,**
 - **Variety of daytime tours, and**
 - **Quality of shopping.**
- With all four factors the overall r^2 is .475 meaning that **47.5% of overall satisfaction is accounted for by these four factors.**

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**Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2010, and Jan, Feb, Mar, Apr, May 2011
and Overall Oct 2010 - May 2011**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Combined Oct 2010 - May 2011
Independent Variables:	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									
Variety of nighttime tours				1					1
Quality of shopping	1								2
Variety of shopping								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%	1.2%

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 May 2011 Period, by rank order they are:
 - **Safety walking around at night, and**
 - **Variety of shopping.**
- With these two factors the overall r^2 is .042 meaning that **4.2% of per person on island expenditure is accounted for by these two factors.**