



# **GUAM VISITORS BUREAU**

## **Korean Visitor Tracker Exit Profile**

### **FY2011 MARKET SEGMENTATION –**

### **OCTOBER 2010**



**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.

# 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

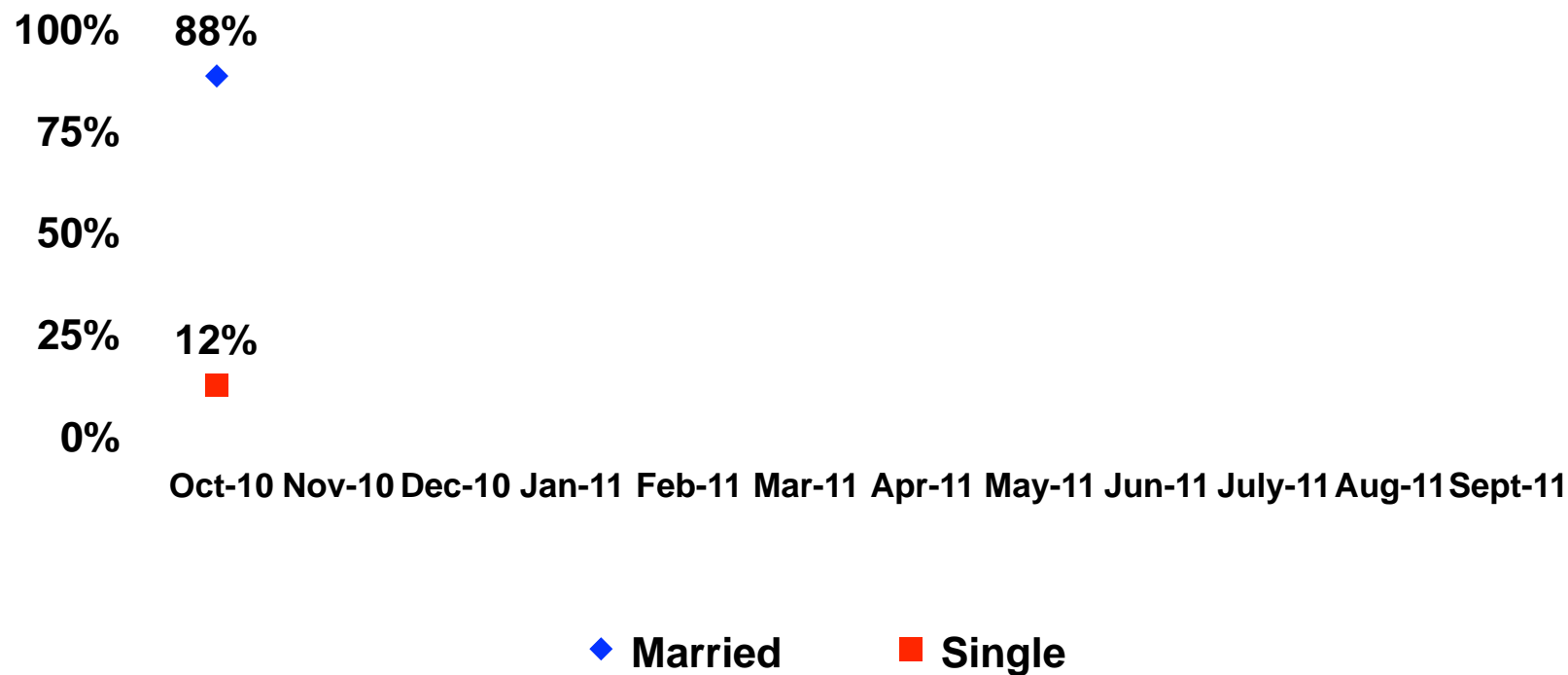
# Highlighted Segments

..	Oct 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%											
Repeaters	14%											
Shoppers	54%											
Seniors	4%											
OL/Salary woman	10%											
Group Travelers	5%											
Students	1%											
Golfers	5%											
Wedding	1%											
Divers	17%											
Honey- mooners	25%											
TOTAL	353											

# **SECTION 1**

# **PROFILE OF RESPONDENTS**

# Marital Status Tracking

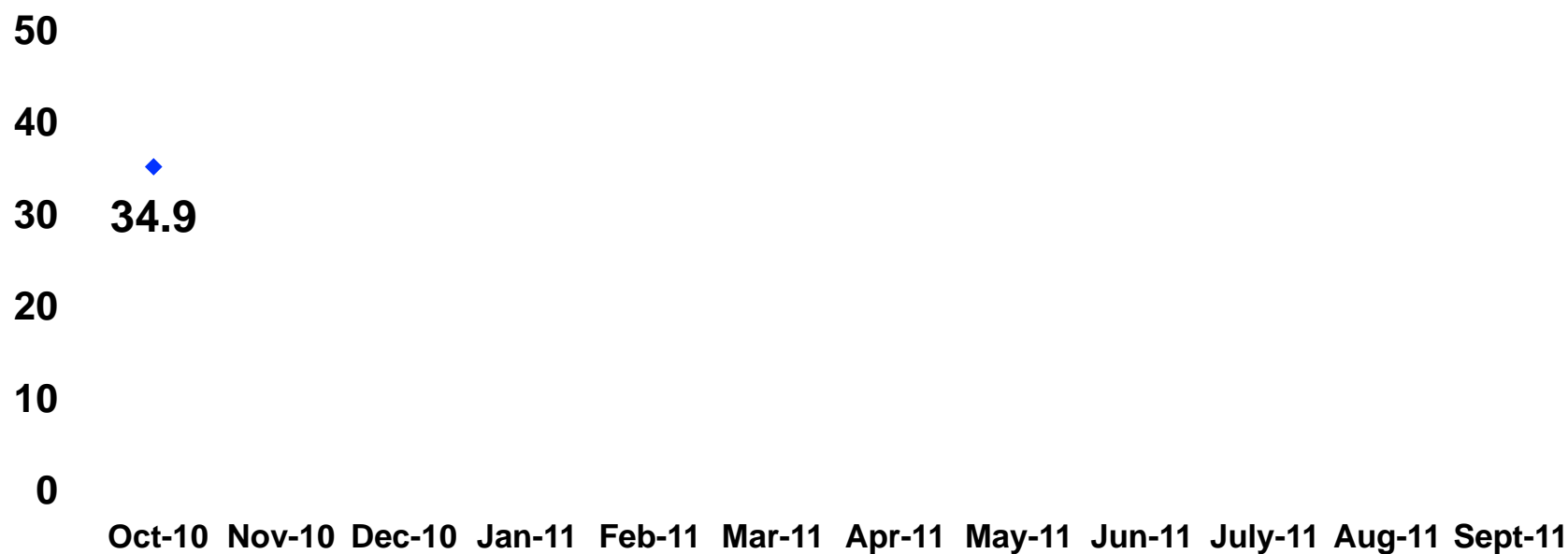


# Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	311	130	44	173	25	17	4	15	3	88	53	13
		Col %	88%	90%	86%	90%	74%	89%	80%	94%	75%	99%	90%	100%
	Single	Count	42	15	7	19	9	2	1	1	1	1	6	
		Col %	12%	10%	14%	10%	26%	11%	20%	6%	25%	1%	10%	
Total	Count		353	145	51	192	34	19	5	16	4	89	59	13



# Average Age Tracking



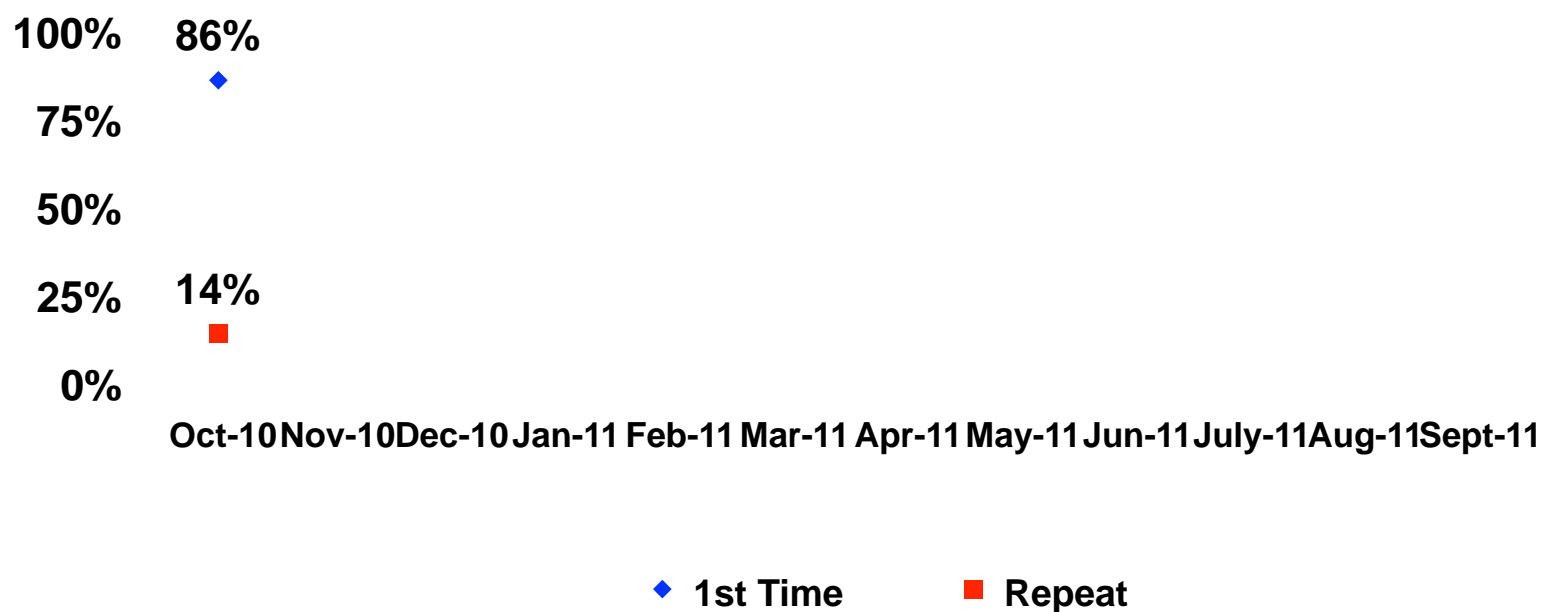
# Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	194	58	16	113	28	8	3	8	1	77	34	
		Col %	55%	40%	31%	59%	82%	42%	60%	50%	25%	87%	58%	
	35-54	Count	153	83	34	75	6	11	2	8		12	25	7
		Col %	43%	57%	67%	39%	18%	58%	40%	50%		13%	42%	54%
	55+	Count	6	4	1	4					3			6
		Col %	2%	3%	2%	2%					75%			46%
Total	Count		353	145	51	192	34	19	5	16	4	89	59	13
C	Mean		34.9	36.7	38.1	34.7	31.2	37.7	36.8	35.5	51.8	29.8	33.8	55.0
	Median		33	36	39	33	31	39	34	35	58	29	32	53

# Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 31	Less than KW12 million	Count	5	3		4				1	1	2	1	1
		Col %	1%	2%		2%				6%	25%	2%	2%	8%
	KW12M-KW24M	Count	21	4	1	18			1	2		13	8	1
		Col %	6%	3%	2%	10%			33%	13%		15%	14%	8%
	KW24M-KW36M	Count	58	18	5	31	8	2		3	2	21	9	4
		Col %	17%	13%	10%	17%	26%	11%		19%	50%	24%	15%	31%
	KW36M-KW48M	Count	60	15	6	30	7	1		5	1	22	11	1
		Col %	17%	11%	12%	16%	23%	6%		31%	25%	25%	19%	8%
	KW48M-KW60M	Count	50	19	6	30	4	4				13	5	1
		Col %	15%	13%	12%	16%	13%	22%				15%	8%	8%
	KW60M-KW72M	Count	47	22	8	25	4	6	1	2		8	9	1
		Col %	14%	16%	16%	13%	13%	33%	33%	13%		9%	15%	8%
	KW72M+	Count	94	55	22	46	8	5		3		5	13	4
		Col %	27%	39%	45%	25%	26%	28%		19%		6%	22%	31%
	No Income	Count	8	5	1	3			1			3	3	
		Col %	2%	4%	2%	2%			33%			3%	5%	
Total	Count		343	141	49	187	31	18	3	16	4	87	59	13

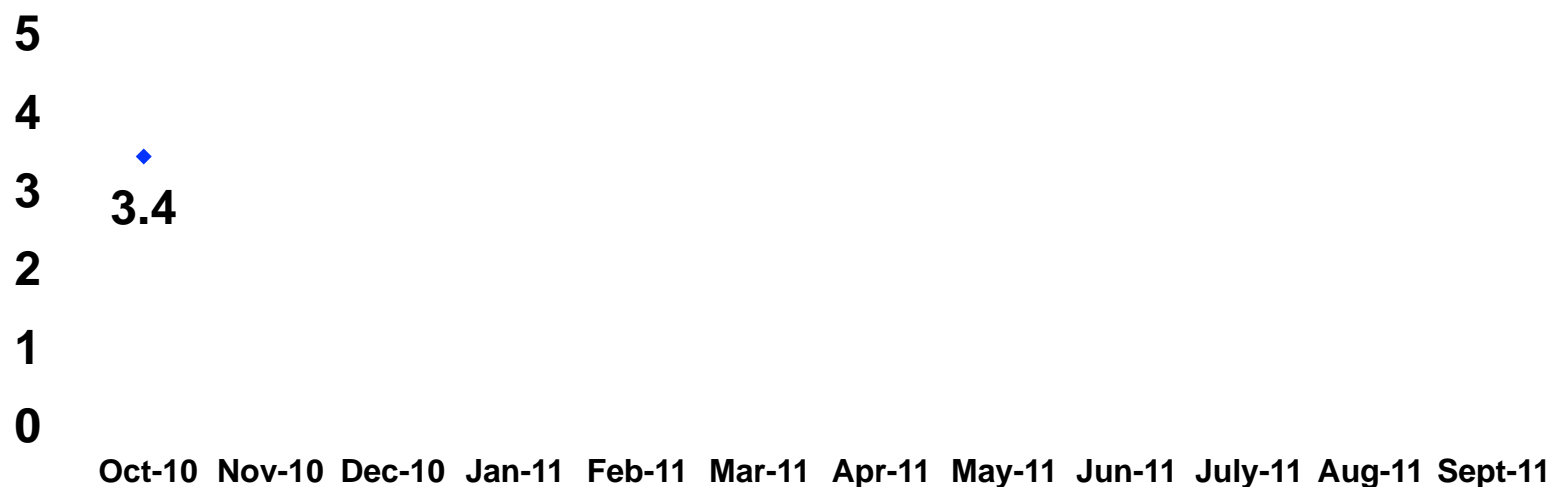
# Prior Trips to Guam Tracking



# Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 3A	Yes	Count	302	114		170	27	18	4	14	4	88	54	12
		Col %	86%	79%		89%	79%	95%	80%	88%	100%	99%	92%	92%
	No	Count	51	31	51	22	7	1	1	2		1	5	1
		Col %	14%	21%	100%	11%	21%	5%	20%	13%		1%	8%	8%
Total	Count		353	145	51	192	34	19	5	16	4	89	59	13

# 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	3.4	3.5	3.4	3.4	3.2	3.2	3.2	3.5	3.0	3.4	3.5	3.2
Median	3	3	3	3	3	3	3	4	3	3	3	3
Minimum	1	3	1	2	1	3	3	3	3	2	3	3
Maximum	9	9	9	8	6	4	4	4	3	8	8	4

# 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	220	98	26	124	15		3	10	2	70	37	8
		Col %	63%	68%	52%	65%	44%		60%	63%	50%	79%	63%	57%
	Free-time package tours	Count	97	36	14	51	14		1	6	1	17	16	2
		Col %	28%	25%	28%	27%	41%		20%	38%	25%	19%	27%	17%
	Individually arranged travel	Count	12	8	7	4	2				1			1
		Col %	3%	6%	14%	2%	6%				25%			8%
	Group tour	Count	19	2	1	12	3	19	1			2	6	1
		Col %	5%	1%	2%	6%	9%	100%	20%			2%	10%	8%
	Other	Count	3	1	2									
		Col %	1%	1%	4%									
Total	Count		351	145	50	191	34	19	5	16	4	89	59	12

# Travel Motivation Segmentation

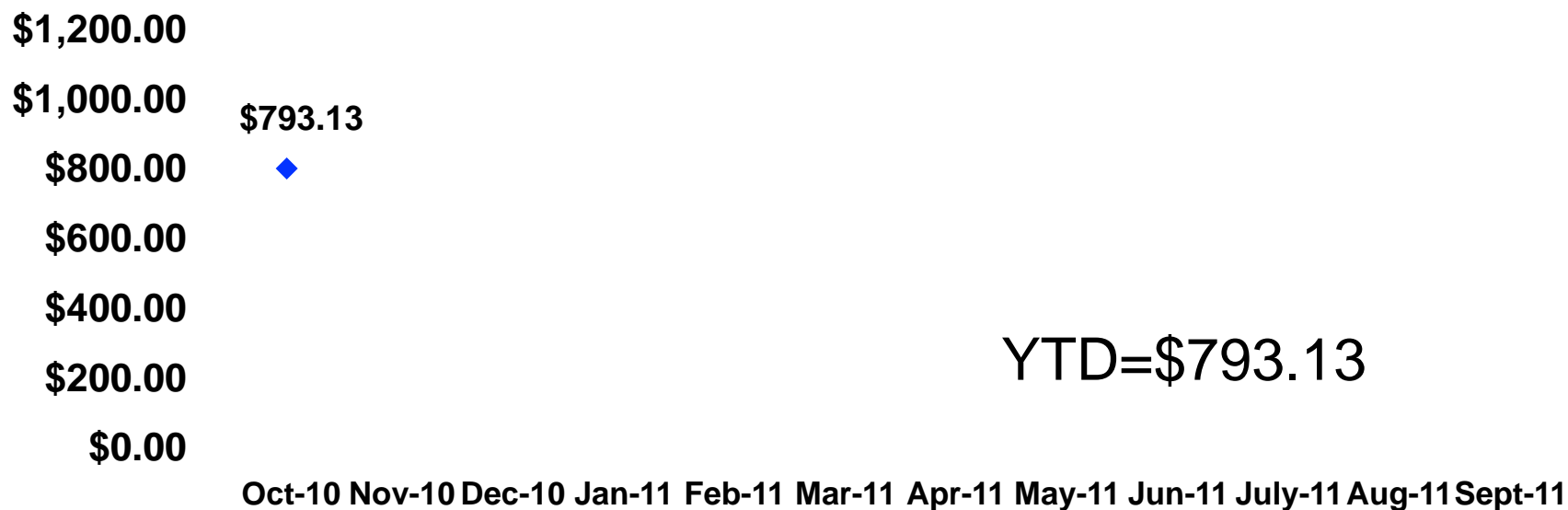
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	52%	59%	61%	55%	56%	32%	40%	81%		36%	58%	31%
	Beautiful seas, beaches, tropical climate	38%	43%	47%	43%	35%	11%	40%	38%	25%	28%	37%	46%
	Honeymoon	25%	2%	2%	31%	21%	11%	40%	13%		100%	37%	
	It is a safe place to spend a vacation	21%	27%	22%	22%	15%		40%			20%	17%	23%
	Short travel time	20%	26%	16%	18%	24%	5%	40%	25%		20%	24%	
	Recommendation of friend, relative, travel agency	16%	19%	6%	17%	12%	5%	20%	38%		9%	20%	23%
	My company sponsored me	14%	10%	8%	13%	18%	63%	20%	6%			17%	15%
	A previous visit	8%	14%	53%	6%	9%			6%		1%	3%	
	Pleasure	8%	12%	16%	9%	3%	5%	20%	13%	25%	2%	8%	8%
	Shopping	7%	9%	10%	8%	9%	5%	20%	13%		3%	5%	
	Water sports	6%	7%	4%	6%	6%		40%			4%	5%	23%
	Price of the tour package	4%	5%	4%	4%				13%		8%	3%	
	Organized Sporting Activity	3%	3%	4%	3%			20%			1%	5%	
	Company or Business trip	3%		4%	4%		16%		6%				
	SCUBA diving	2%	1%	2%	2%			20%			1%	5%	8%
	To visit friends or relatives	2%	3%	6%	1%				6%			2%	
	To get married or Attend wedding	1%	2%		2%					100%			23%
	Other	2%	3%	2%	2%		5%					2%	
	Promotional materials from GVB	2%	1%		1%						3%	2%	
	Career certification or testing	1%	1%	6%		6%							
	To golf	1%	1%	2%	1%				6%		1%		
	Special promotion	0%			1%							2%	
	Convention, Conference, Trade show	0%											
Total	Cases	353	145	51	192	34	19	5	16	4	89	59	13

# Information Sources Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	85%	89%	88%	83%	88%	74%	60%	88%	25%	83%	90%	77%
	Travel agent brochure	46%	38%	22%	49%	35%	42%	80%	44%	75%	67%	46%	46%
	Friend or relative	18%	20%	6%	19%	15%	11%	20%	38%		20%	20%	15%
	I have been to Guam before	14%	22%	100%	12%	21%	5%	20%	13%		1%	8%	8%
	Company travel department	17%	15%	12%	18%	18%	32%	20%	19%	25%	16%	19%	8%
	TV	8%	6%	2%	7%	3%	11%		6%	25%	8%	10%	31%
	Guam promo activities	7%	8%	6%	6%	15%	5%				8%	7%	
	Travel guide book at bookstores	7%	5%	6%	8%	18%	11%	20%			6%	5%	
	Magazine	4%	4%	6%	4%	3%	5%		19%		2%	3%	8%
	Newspaper	2%	2%	4%	2%						2%	3%	
	Pod casts	0%			1%						1%		
Total	Cases	352	144	51	191	34	19	5	16	4	89	59	13

# SECTION 3 **EXPENDITURES**

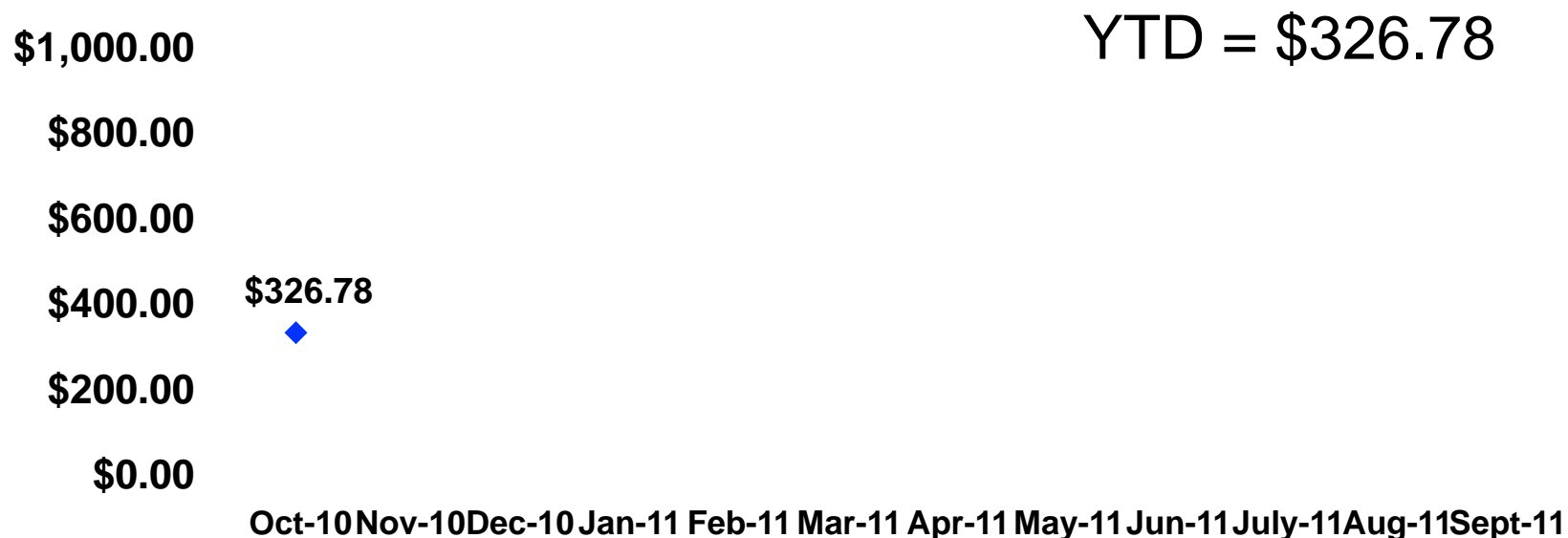
# Travel Expenditures Tracking



# Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$793.13	\$692.02	\$760.13	\$899.64	\$736.83	\$433.12	\$749.90	\$780.50	\$952.29	\$1,119.50	\$888.29	\$688.03
	Median	\$830	\$778	\$712	\$890	\$654	\$0	\$400	\$869	\$718	\$1,262	\$890	\$547
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Maximum	\$10,948.44	\$4,714.67	\$4,714.67	\$10,948.44	\$4,714.67	\$1,530.93	\$1,703.51	\$2,223.90	\$2,372.16	\$2,846.60	\$2,846.60	\$2,372.16

# 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	\$326.78	\$228.41	\$440.02	\$372.49	\$344.54	\$267.89	\$224.10	\$335.58	\$184.62	\$460.84	\$415.20	\$143.72
	Median	\$227	\$167	\$225	\$256	\$250	\$150	\$61	\$233	\$183	\$400	\$300	\$125
	Minimum	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$38.46	\$ .00	\$ .00	\$ .00
	Maximum	\$2,500.00	\$1,250.00	\$2,500.00	\$2,500.00	\$2,000.00	\$1,400.00	\$800.00	\$2,500.00	\$333.33	\$1,900.00	\$2,500.00	\$300.00



# On-Island Expenditures Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$50.97	\$78.06	\$108.06	\$53.71	\$30.00	\$2.63	\$0.00	\$99.94	\$26.25	\$16.38	\$21.98	\$3.85
	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	\$30.35	\$21.79	\$54.22	\$39.54	\$19.32	\$20.00	\$16.00	\$123.25	\$12.50	\$29.96	\$60.80	\$20.00
	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-OUT- SIDE HOTEL/ REST	Mean	\$38.16	\$47.92	\$72.86	\$41.40	\$73.00	\$5.26	\$10.00	\$65.00	\$75.00	\$22.47	\$48.17	\$23.08
	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
OPTIONAL TOUR	Mean	\$122.22	\$114.52	\$69.61	\$132.09	\$170.38	\$30.00	\$189.00	\$61.25	\$0.00	\$176.48	\$173.64	\$113.08
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$75.00	\$0.00	\$0.00	\$40.00	\$75.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$163.42	\$148.60	\$214.63	\$193.26	\$89.12	\$130.53	\$66.00	\$83.63	\$75.00	\$245.83	\$132.85	\$90.77
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$117.15	\$87.21	\$109.71	\$141.67	\$54.41	\$20.00	\$160.00	\$105.00	\$0.00	\$190.92	\$195.15	\$85.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$30.00	\$0.00
LOCAL TRANS	Mean	\$24.42	\$30.97	\$61.76	\$24.72	\$42.29	\$3.68	\$3.20	\$39.06	\$10.00	\$9.67	\$21.32	\$42.31
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$3.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$189.33	\$211.17	\$189.84	\$225.18	\$167.68	\$161.05	\$104.00	\$279.38	\$388.75	\$226.90	\$202.03	\$123.46
	Median	\$0.00	\$20.00	\$14.00	\$5.00	\$6.00	\$0.00	\$0.00	\$30.00	\$425.00	\$20.00	\$10.00	\$0.00

# Total Expenditures Tracking

YTD=\$1,119.91



# Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,119.91	\$920.43	\$1,200.14	\$1,272.13	\$1,081.37	\$701.02	\$974.00	\$1,116.09	\$1,136.90	\$1,580.34	\$1,303.50	\$831.75
	Median	1059.73	960.60	1004.60	1165.60	997.08	218.96	460.80	1053.28	904.39	1639.56	1229.56	585.88
	Minimum	.00	.00	.00	.00	.00	.00	.00	.00	116.67	.00	.00	.00
	Maximum	11181.78	5714.67	5714.67	11181.78	5714.67	2645.39	2503.51	4723.90	2622.16	3605.50	4723.90	2622.16

# 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 ( $p \leq .05$ ) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

21

### Drivers of Overall Satisfaction, Oct 2010

Drivers:	rank
Cleanliness of beaches & parks	3
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	2
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	<b>54.5%</b>
NOTE: Only significant drivers are included.	

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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 October 2010 Period, by rank order they are:
  - **Quality of hotel accommodations,**
  - **Variety of day time tours, and**
  - **Cleanliness of beaches and parks.**
- With all three factors the overall  $r^2$  is .545 meaning that **54.5% of overall satisfaction is accounted for by these three factors.**

21

### Drivers of Per Person On Island Expenditures, Oct 2010

Drivers:	rank
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	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	

% of Per Person On Island Expenditures Accounted For **1.8%**

NOTE: Only significant drivers are included.



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# 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 October 2010 Period, that is:
  - **Quality of shopping.**
- This factor has an  $r^2$  of .018 meaning that **1.8 % of per person on island expenditure is accounted for by this factor.**