



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2011 MARKET SEGMENTATION –

SEPTEMBER 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

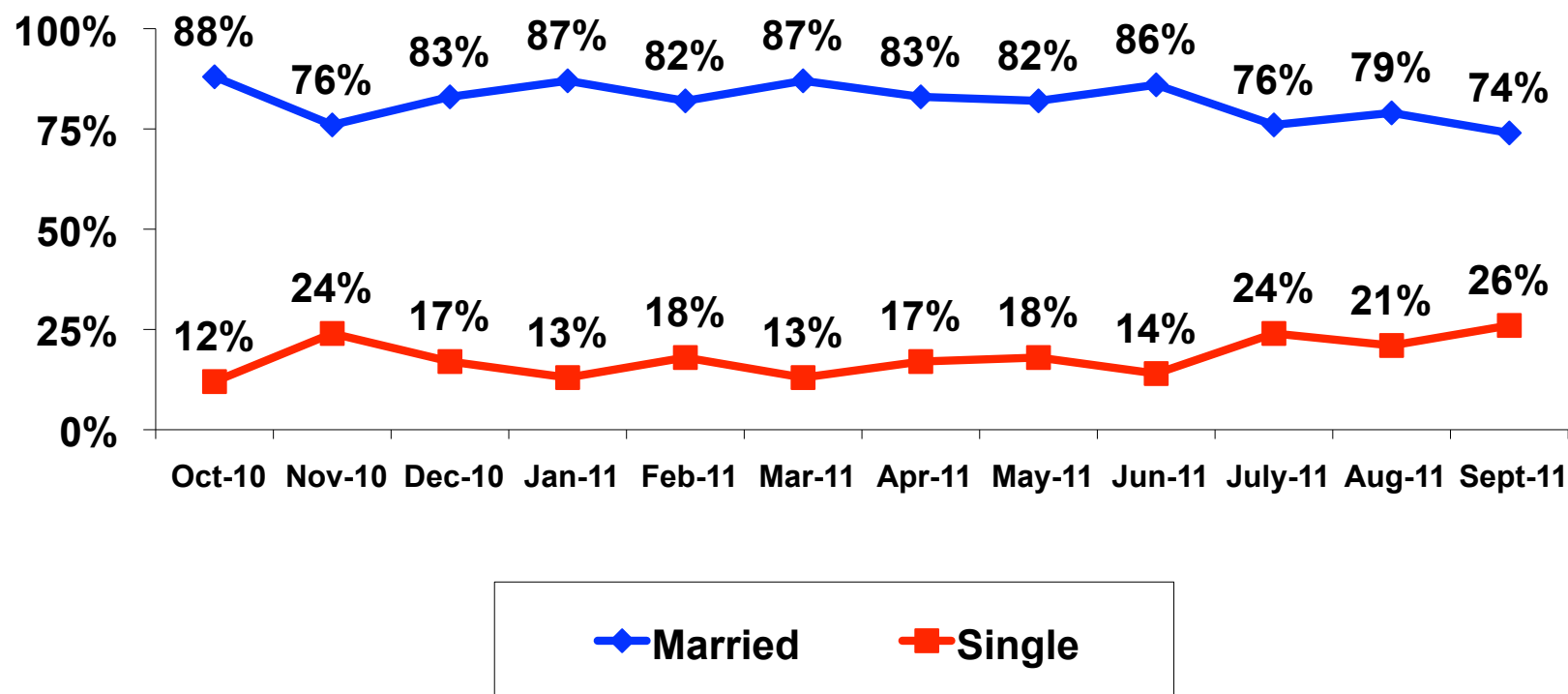
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

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%	44%	54%	56%	55%
Repeaters	14%	17%	18%	12%	23%	16%	16%	19%	21%	15%	21%	15%
Shoppers	54%	62%	57%	56%	53%	61%	62%	64%	59%	55%	63%	68%
Seniors	4%	5%	6%	9%	6%	5%	3%	5%	3%	4%	3%	5%
OL/Salary woman	10%	11%	16%	7%	9%	12%	16%	15%	13%	13%	14%	12%
Group Travelers	5%	6%	2%	3%	1%	1%	1%	1%	2%	1%	1%	1%
Students	1%	2%	2%	1%	1%	1%	2%	2%	3%	1%	1%	3%
Golfers	5%	7%	9%	8%	8%	4%	5%	5%	4%	5%	4%	6%
Wedding	1%	1%	1%	1%	0%	1%	1%	0%	-	0%	-	0%
Divers	17%	24%	17%	18%	16%	14%	18%	17%	11%	15%	14%	16%
Honey-mooner	25%	13%	28%	16%	7%	38%	31%	19%	20%	5%	2%	10%
TOTAL	353	352	354	353	353	353	353	352	352	354	354	352

SECTION 1 **PROFILE OF RESPONDENTS**

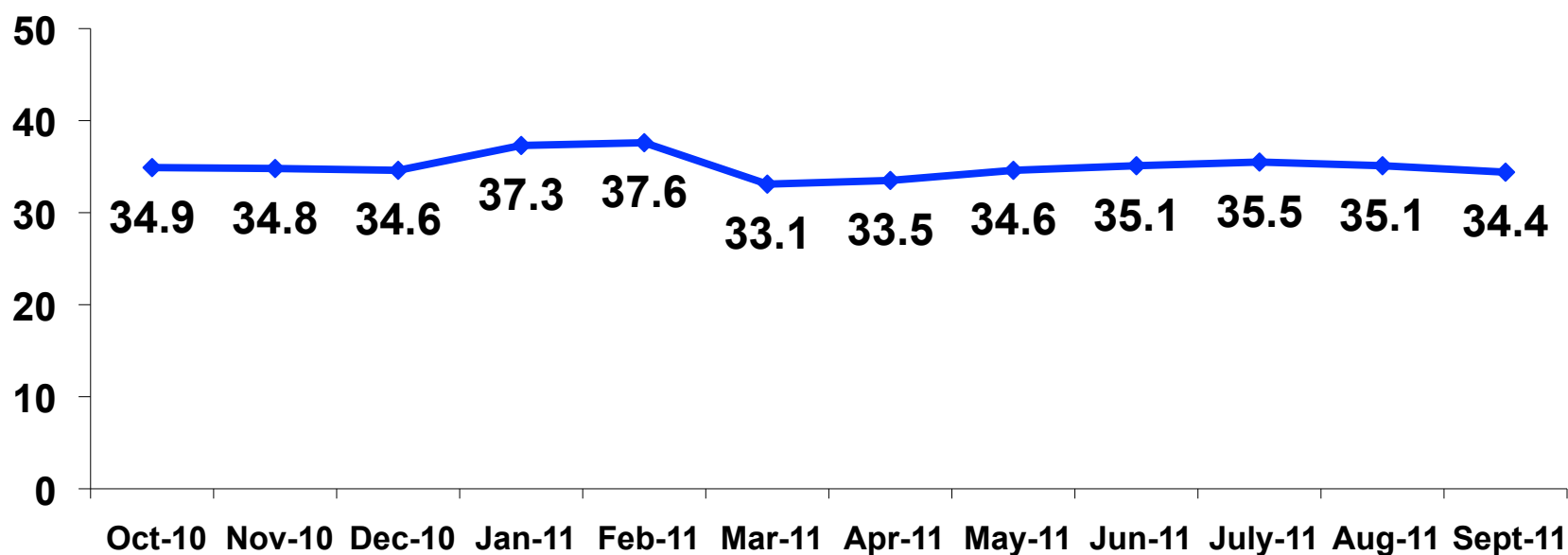
Marital Status Tracking



Marital Status Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
B	Married	Count	261	139	43	176	21	3	3	14	1	36	37	16
		Col %	74%	87%	81%	74%	50%	100%	30%	70%	100%	100%	65%	100%
	Single	Count	91	21	10	62	21		7	6			20	
		Col %	26%	13%	19%	26%	50%		70%	30%			35%	
Total	Count		352	160	53	238	42	3	10	20	1	36	57	16

Average Age Tracking



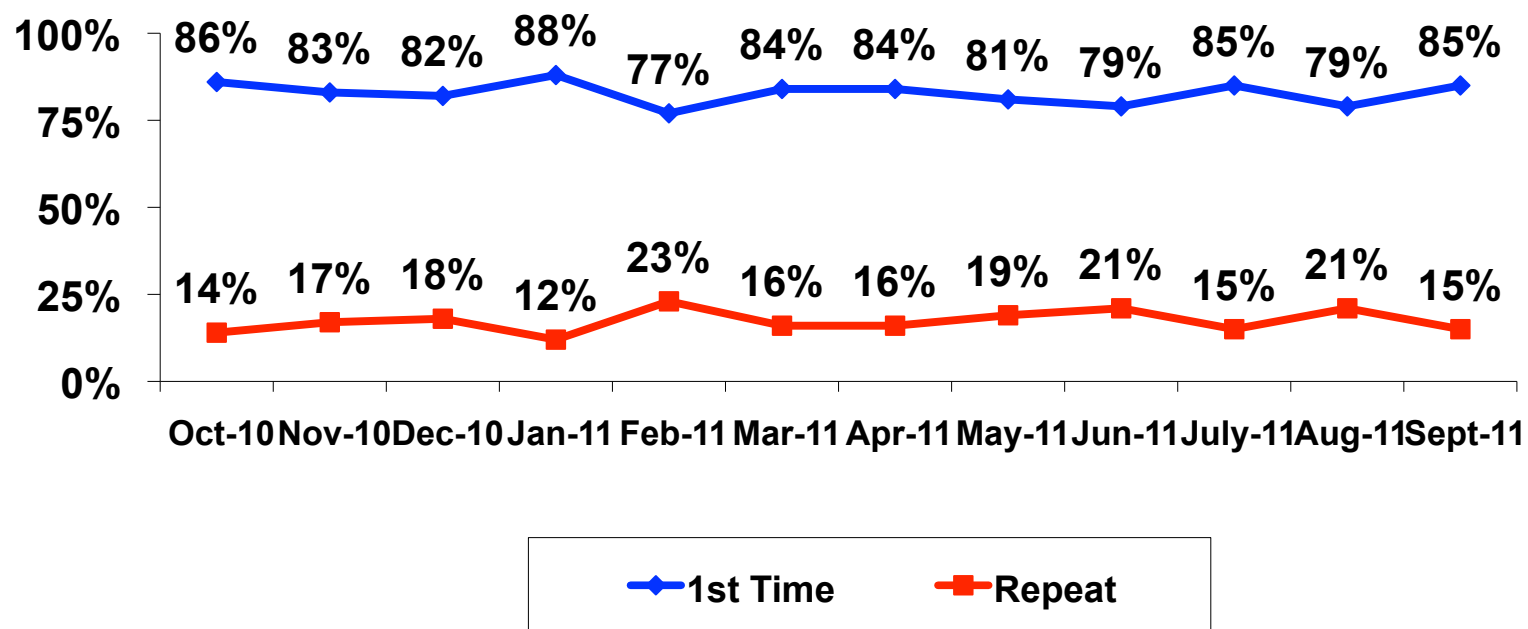
Age Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	202	60	25	146	35		10	10	1	29	38	
		Col %	57%	38%	47%	61%	83%		100%	50%	100%	81%	67%	
	35-54	Count	142	95	27	87	7	3		9		7	19	8
		Col %	40%	59%	51%	37%	17%	100%		45%		19%	33%	50%
	55+	Count	8	5	1	5				1				8
		Col %	2%	3%	2%	2%				5%				50%
Total	Count		352	160	53	238	42	3	10	20	1	36	57	16
C	Mean		34.4	36.4	36.0	33.9	30.5	37.0	29.9	36.4	31.0	31.4	33.0	55.6
	Median		33	36	35	32	30	36	30	35	31	32	31	55

Income Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31	Less than KW12 million	Count	4	1	1	2				1		1		
		Col %	1%	1%	2%	1%				5%		3%		
	KW12M-KW24M	Count	20	5	2	11	6			1		3	3	1
		Col %	6%	3%	4%	5%	14%			5%		8%	5%	6%
	KW24M-KW36M	Count	60	13	5	41	8		2			8	14	
		Col %	18%	9%	10%	18%	19%		29%			22%	25%	
	KW36M-KW48M	Count	52	21	3	35	6			3	1	9	11	1
		Col %	16%	15%	6%	15%	14%			15%	100%	25%	20%	6%
	KW48M-KW60M	Count	45	19	5	34	4			2		3	9	2
		Col %	14%	13%	10%	15%	10%			10%		8%	16%	13%
	KW60M-KW72M	Count	44	22	6	34	6			3		5	7	3
		Col %	13%	15%	13%	15%	14%			15%		14%	13%	19%
	KW72M+	Count	96	60	26	65	12	2	2	9		7	10	9
		Col %	29%	42%	54%	29%	29%	100%	29%	45%		19%	18%	56%
	No Income	Count	6	2		5			3	1			2	
		Col %	2%	1%		2%			43%	5%			4%	
Total	Count		327	143	48	227	42	2	7	20	1	36	56	16

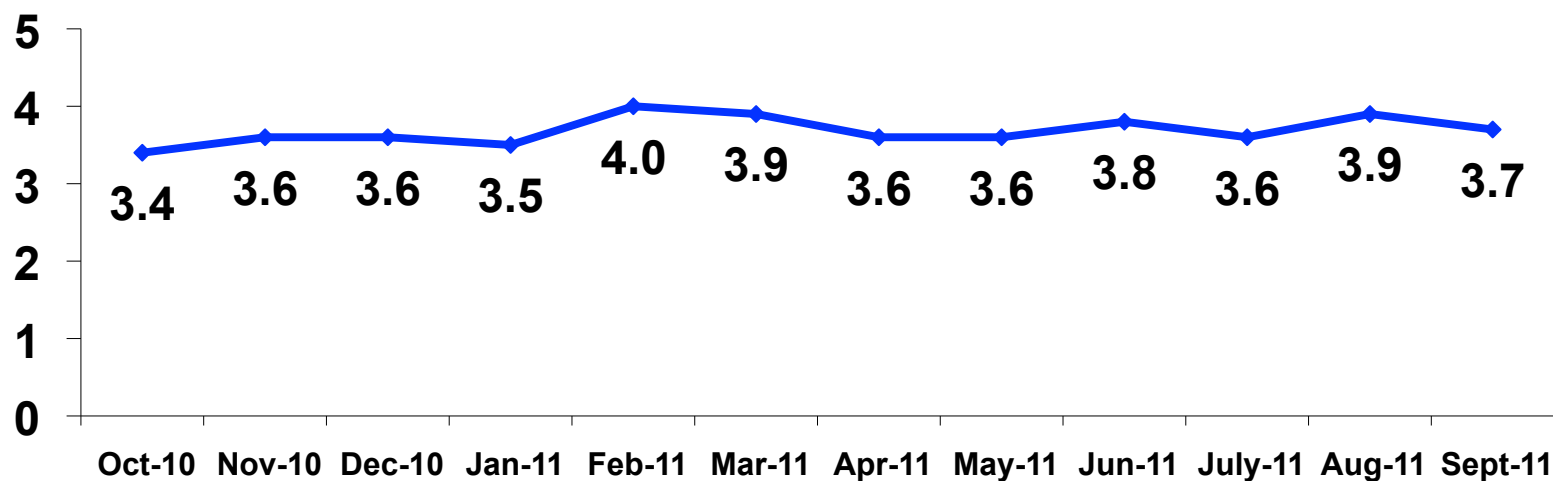
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A	Yes	Count	299	133		205	34	3	6	13	1	33	53	15
		Col %	85%	83%		86%	81%	100%	60%	65%	100%	92%	93%	94%
	No	Count	53	27	53	33	8		4	7		3	4	1
		Col %	15%	17%	100%	14%	19%		40%	35%		8%	7%	6%
Total	Count		352	160	53	238	42	3	10	20	1	36	57	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	3.7	3.5	5.0	3.6	3.4	3.0	11.2	3.8	4.0	3.6	3.4	3.5
Median	3	3	3	3	3	3	3	4	4	4	3	3
Minimum	1	3	1	3	3	3	3	2	4	3	2	3
Maximum	80	14	80	15	7	3	80	7	4	6	6	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	Count	170	93	13	108	12		4	7	1	22	28	8
	tours	Col %	49%	59%	25%	46%	29%		40%	35%	100%	61%	49%	50%
	Free-time	Count	138	46	28	99	26		4	10		14	25	5
	package tours	Col %	39%	29%	55%	42%	62%		40%	50%		39%	44%	31%
	Individually	Count	36	15	9	26	3		2	2			4	2
	arranged travel	Col %	10%	9%	18%	11%	7%		20%	10%			7%	13%
	Group tour	Count	3	3		2		3						
		Col %	1%	2%		1%		100%						
	Other	Count	1	1	1	1	1			1				
		Col %	0%	1%	2%	0%	2%			5%				
	Company paid	Count	2			1								1
	travel	Col %	1%			0%								6%
Total	Count		350	158	51	237	42	3	10	20	1	36	57	16

Travel Motivation Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5	Just to relax	65%	70%	58%	69%	67%	100%	70%	30%	100%	33%	58%	69%
	Beautiful seas, beaches, tropical climate	45%	44%	36%	47%	48%		40%	40%		17%	49%	63%
	Short travel time	31%	30%	36%	34%	36%	33%	50%	25%		22%	23%	25%
	It is a safe place to spend a vacation	29%	31%	45%	31%	17%	33%	40%	50%	100%	11%	25%	31%
	Recommendation of friend, relative, travel agency	18%	21%	2%	20%	26%		10%	25%		17%	19%	6%
	Shopping	19%	16%	19%	23%	12%			15%		25%	9%	6%
	Honeymoon	10%		6%	11%	10%			10%	100%	100%	19%	
	Pleasure	11%	10%	28%	12%	12%		30%	25%		3%	9%	
	A previous visit	7%	9%	49%	8%	10%		20%	15%			2%	6%
	Water sports	10%	6%	8%	11%	10%		10%	5%		3%	18%	
	Price of the tour package	5%	3%	8%	6%	10%		20%			6%	4%	
	To golf	3%	1%	9%	3%			10%	40%			2%	13%
	SCUBA diving	3%	3%	6%	3%			10%	5%			9%	6%
	Other	2%	3%	2%	2%	2%			10%		3%	5%	
	To visit friends or relatives	2%	1%	4%	2%			10%			3%		6%
	Promotional materials from GVB	2%	3%	4%	2%								6%
	My company sponsored me	2%	1%	2%	2%								
	Organized Sporting Activity	1%	1%	2%	1%							2%	
	Career certification or testing	1%	1%	2%	1%			10%					
	Company or Business trip	1%			0%								6%
	To get married or Attend wedding	0%								100%	3%	2%	
	Special promotion	1%									3%		
	Convention, Conference, Trade show	0%			0%								
Total	Cases	352	160	53	238	42	3	10	20	1	36	57	16

Information Sources

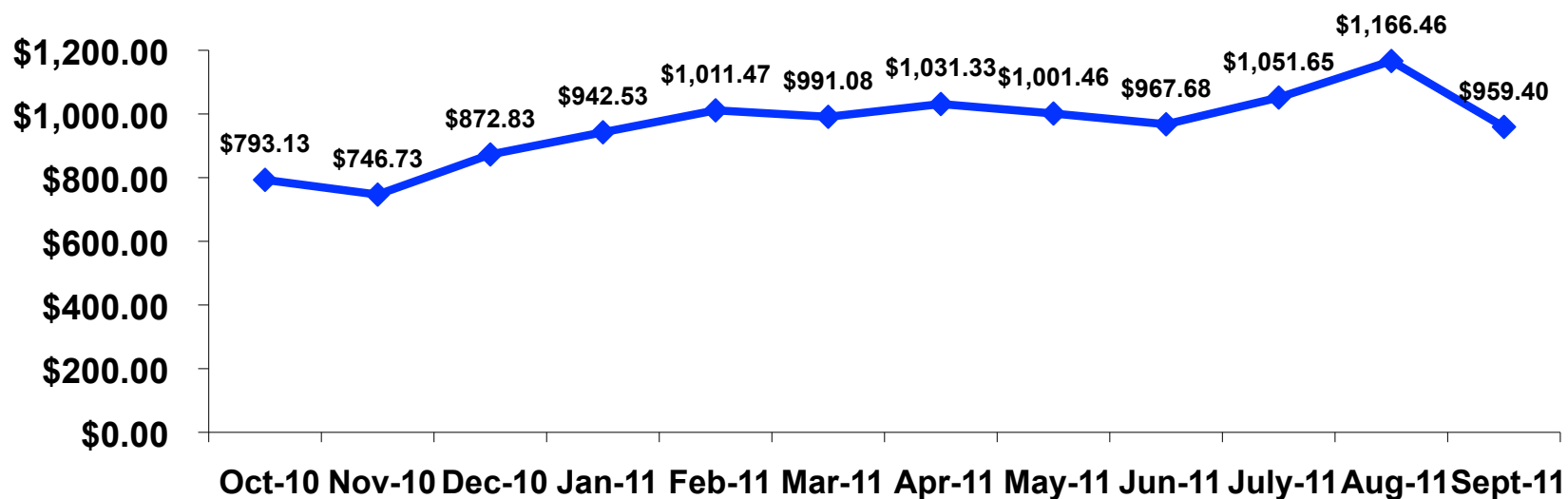
Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1	Internet	90%	88%	83%	93%	93%	67%	90%	85%	100%	89%	89%	81%
	Travel agent brochure	37%	32%	28%	37%	33%		20%	35%	100%	50%	40%	31%
	Friend or relative	24%	24%	8%	24%	21%	33%	30%	25%		33%	26%	25%
	I have been to Guam before	15%	17%	98%	14%	19%		30%	35%		8%	7%	6%
	Company travel department	13%	16%	8%	13%	19%			5%		6%	7%	
	Travel guide book at bookstores	11%	9%	6%	13%	17%		30%	5%		8%	18%	13%
	TV	8%	9%	9%	7%	5%	33%		5%		6%	5%	
	Guam promo activities	7%	5%	6%	8%	7%		10%			3%	7%	6%
	Magazine	3%	4%	4%	3%	5%			5%			7%	13%
	Newspaper	2%	4%	4%	3%		33%		10%		3%	4%	
	Pod casts	0%		2%									
Total	Cases	352	160	53	238	42	3	10	20	1	36	57	16

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

YTD=\$961.35

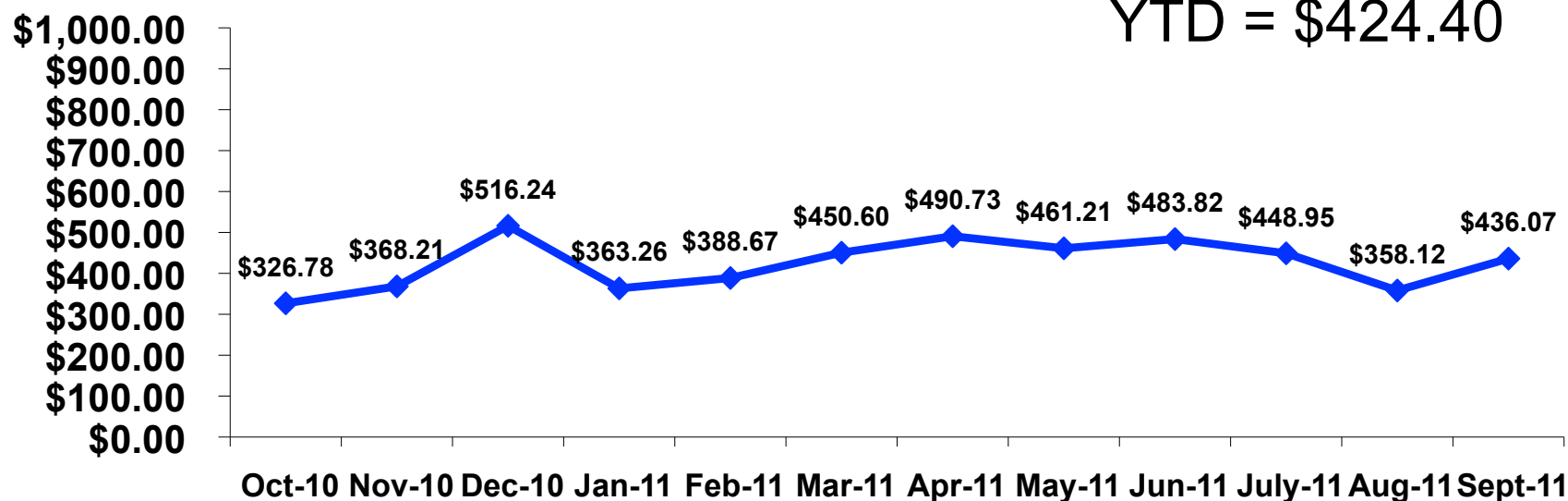


Prepaid Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$959.40	\$828.41	\$847.63	\$1,003.66	\$949.56	\$665.95	\$962.36	\$857.27	\$0.00	\$1,271.35	\$975.63	\$1,047.74
	Median	\$980	\$934	\$934	\$1,027	\$934	\$934	\$1,050	\$712	\$0	\$1,312	\$980	\$934
	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	\$2,912.76	\$2,100.55	\$1,867.15	\$2,912.76	\$1,867.15	\$1,064.28	\$1,400.36	\$2,431.97	\$0.00	\$2,912.76	\$2,100.55	\$2,103.55

On-Island Expenditures Per Person Tracking

YTD = \$424.40



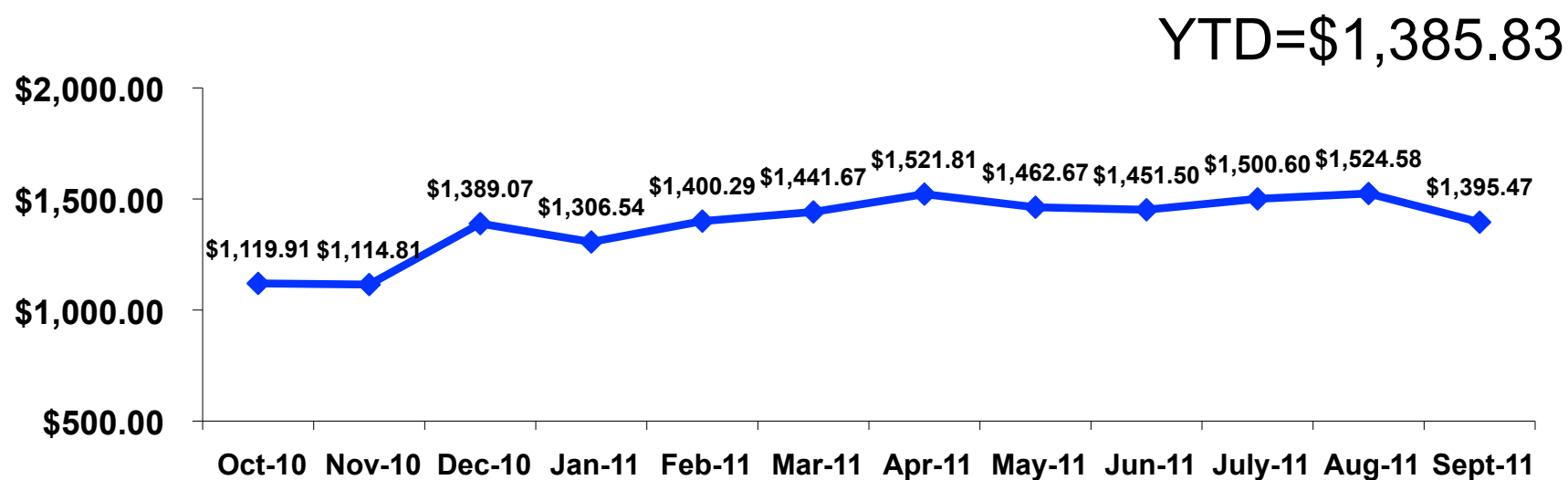
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$436.07	\$301.05	\$470.68	\$486.85	\$364.39	\$22.22	\$516.63	\$540.28	\$400.00	\$606.96	\$502.59	\$603.33
	Median	\$274	\$203	\$245	\$337	\$255	\$0	\$261	\$200	\$400	\$500	\$315	\$350
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	\$0.00	\$0.00	\$0.00
	Maximum	\$4,333.33	\$4,333.33	\$4,333.33	\$4,333.33	\$1,730.00	\$66.67	\$2,700.00	\$4,333.33	\$400.00	\$2,000.00	\$2,700.00	\$4,333.33

On-Island Expense Breakdown

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$59.96	\$64.03	\$90.81	\$70.79	\$27.14	\$0.00	\$10.00	\$40.35	\$0.00	\$16.53	\$14.72	\$13.75
	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	\$30.45	\$32.71	\$38.02	\$34.86	\$31.86	\$0.00	\$22.60	\$34.00	\$0.00	\$43.28	\$27.26	\$16.94
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$58.91	\$60.57	\$79.62	\$75.01	\$92.02	\$0.00	\$38.00	\$121.50	\$0.00	\$34.94	\$35.37	\$64.13
	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	\$91.70	\$107.59	\$81.23	\$98.89	\$57.31	\$0.00	\$42.00	\$90.75	\$0.00	\$115.83	\$118.86	\$75.31
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$201.73	\$215.01	\$228.49	\$235.92	\$146.48	\$33.33	\$103.00	\$161.00	\$0.00	\$258.64	\$102.32	\$320.00
	Median	\$0.00	\$0.00	\$10.00	\$50.00	\$6.00	\$0.00	\$0.00	\$35.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$116.72	\$92.48	\$93.08	\$135.63	\$84.29	\$33.33	\$46.00	\$101.25	\$400.00	\$321.69	\$149.39	\$107.19
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	\$150.00	\$0.00	\$0.00
LOCAL TRANS	Mean	\$32.92	\$30.33	\$59.89	\$40.31	\$39.02	\$0.00	\$21.70	\$72.80	\$0.00	\$32.14	\$26.51	\$64.81
	Median	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6.50
OTHER EXP	Mean	\$366.25	\$415.48	\$521.38	\$389.47	\$197.50	\$0.00	\$774.70	\$779.90	\$400.00	\$264.47	\$518.40	\$1,165.19
	Median	\$40.00	\$62.50	\$40.00	\$40.00	\$0.00	\$0.00	\$30.00	\$15.00	\$400.00	\$12.00	\$100.00	\$60.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
TOTPP	Mean	\$1,395.47	\$1,129.45	\$1,318.31	\$1,490.52	\$1,313.94	\$688.17	\$1,478.99	\$1,397.55	\$400.00	\$1,878.31	\$1,478.21	\$1,656.08
	Median	1347.34	1130.62	1300.24	1415.31	1226.72	933.58	1442.49	1216.88	400.00	1808.67	1413.65	1454.97
	Minimum	.00	.00	.00	.00	.00	.00	.00	.00	400.00	150.00	.00	553.41
	Maximum	5867.15	4916.82	4916.82	4916.82	3037.01	1130.94	3820.29	4916.82	400.00	4520.66	3820.29	4916.82

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 ($p \leq .05$) 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, Sept 2011 and Overall Oct 2010 - Sept 2011

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Combined Oct 2010 - Sept 2011
Independent Variables:	rank	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		5	3
Ease of getting around				2	4							3	6
Safety walking around at night													
Quality of daytime tours		1				3	1				2	2	2
Variety of daytime tours	2		4	5	2	2		3	3			6	5
Quality of nighttime tours						4	5			3			
Variety of nighttime tours													
Quality of shopping			3	3			4	4	4	4	3	4	4
Variety of shopping				6									8
Price of things on Guam													7
Quality of hotel accommodations	1	2	1	1	1	1	2	1	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%	46.8%	47.8%
NOTE: Only significant variables are ranked.													

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Korean visitor's experience on Guam is driven by six significant factors in the September 2011 Period, by rank order they are:
 - **Quality of hotel accommodations,**
 - **Quality of daytime tours,**
 - **Ease of getting around,**
 - **Quality of shopping,**
 - **Cleanliness of beaches and parks, and**
 - **Variety of daytime tours.**
- With all six factors the overall r^2 is .468 meaning that **46.8% of overall satisfaction is accounted for by these six factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2010, and Jan, Feb, Mar, Apr, May, June, July, Aug, Sept 2011 and Overall Oct 2010 - September 2011													
	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Combined Oct 2010 - Sep 2011
Independent Variables:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Cleanliness of beaches & parks													
Ease of getting around													
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		2
Quality of shopping	1									1	2	1	1
Variety of shopping								2	2				
Price of things on Guam												2	
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%	5.3%	1.7%
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 September 2011 Period, by rank order they are:
 - **Quality of shopping, and**
 - **Price of things on Guam.**
- With these two factors the overall r^2 is .053 meaning that **5.3% of per person on island expenditure is accounted for by these two factors.**