



GUAM VISITORS BUREAU

Korean Visitor Tracker Exit Profile

FY2015 Market Segmentation

JULY 2015



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.¹

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:
 - Family/FITs
 - Golden Miss
 - Group Travelers
 - English Language Tour
 - Honeymooner
 - Wedding
 - Special Interest Trvl
 - 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

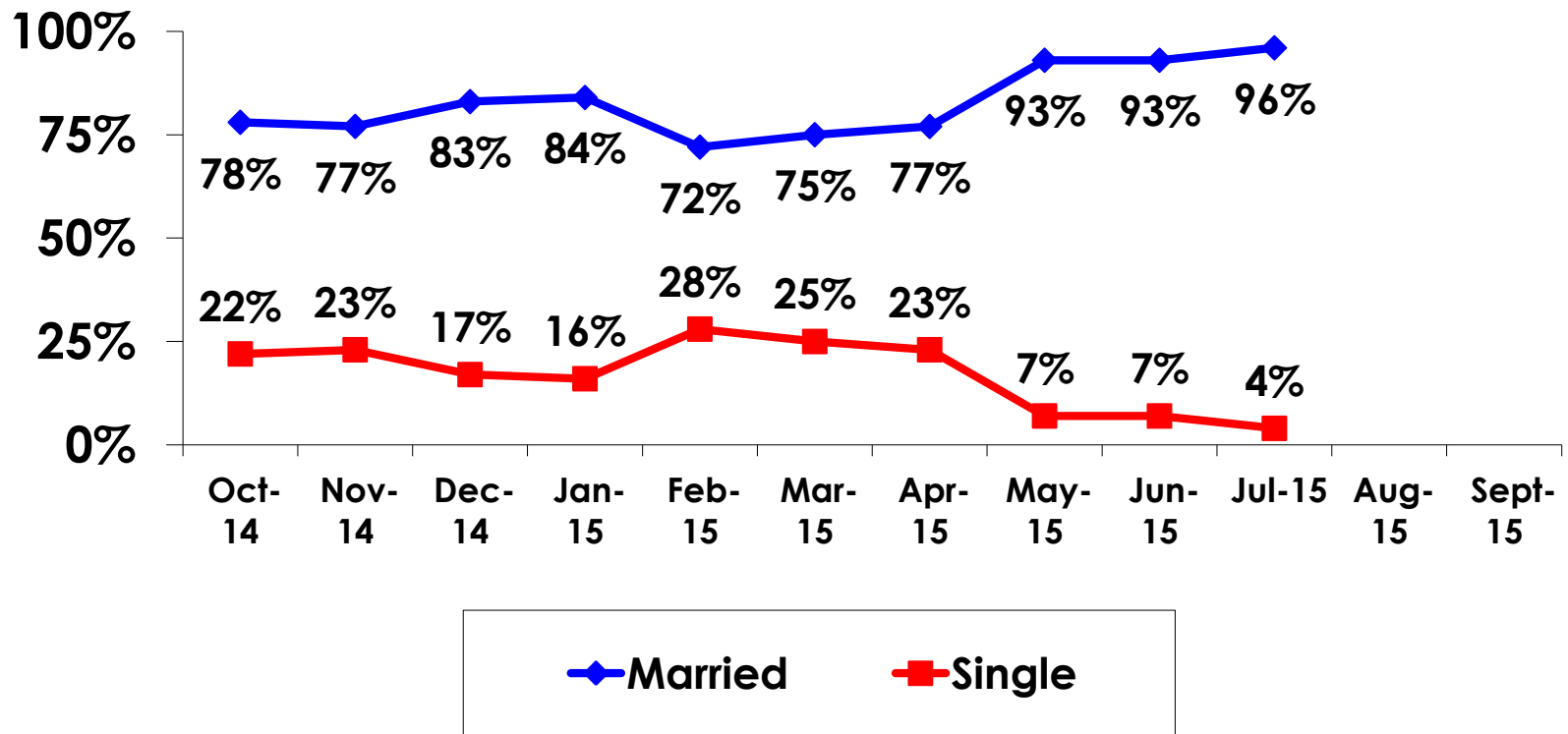
- Family/ FITs – Q.6/ Q.7
- Golden Miss - Female/ QF/ Q.25
- Group Travelers – Q.7
- English Language Tour – Q.18
- Honeymooner – Q.5
- Wedding – Q.5
- Special Interest Trvl – Q.5/ Q.18
- Incentive Market – Q.5/ Q.7
- 18-35 – Q.F
- 36-55 – Q.F
- Traveling with children – Q.6
- FITs – Q.7
- Seniors –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

Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sept 15
Family/ FIT	8%	9%	14%	13%	5%	5%	3%	7%	1%	-		
Group	2%	2%	1%	0%	1%	0%	-	-	-	-		
Eng Language	1%	0%	0%	1%	-	0%	0%	-	-	-		
Honeymoon	9%	17%	15%	15%	5%	4%	9%	2%	6%	11%		
Wedding	1%	1%	1%	1%	1%	1%	1%	1%	1%	17%		
Incentive	6%	7%	9%	1%	3%	2%	1%	-	3%	6%		
18-35	60%	55%	53%	54%	55%	65%	65%	48%	48%	50%		
36-55	39%	43%	45%	46%	43%	32%	33%	51%	51%	50%		
Child	44%	33%	45%	48%	35%	37%	32%	50%	53%	57%		
FIT	20%	14%	17%	18%	17%	14%	10%	7%	1%	-		
Golden Miss	4%	5%	5%	3%	5%	8%	5%	6%	9%	7%		
Senior	1%	1%	1%	1%	1%	1%	1%	0%	1%	-		
Sport	30%	42%	28%	29%	48%	38%	42%	45%	58%	66%		
TOTAL	351	350	350	353	351	352	350	350	350	352		

SECTION 1 **PROFILE OF RESPONDENTS**

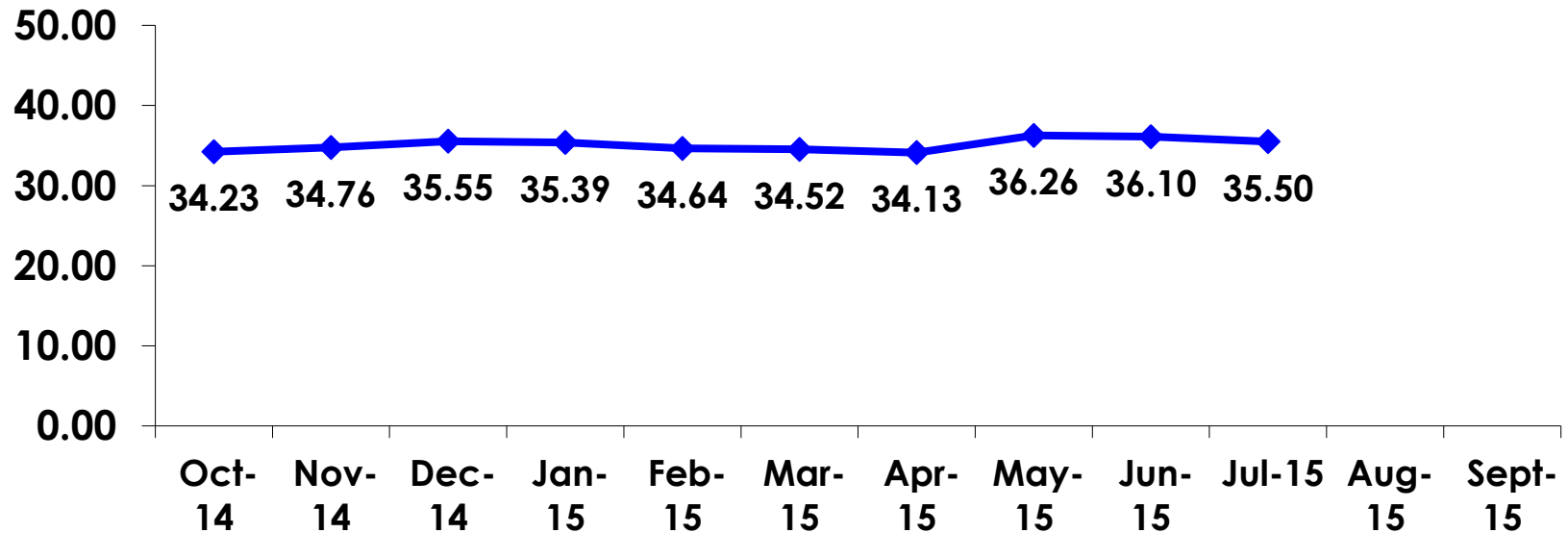
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
QE	Married	Count	339	37	57	19	163	175	202	25	227
		Column N %	96%	97%	98%	90%	93%	100%	100%	100%	97%
	Single	Count	13	1	1	2	13	0	0	0	6
		Column N %	4%	3%	2%	10%	7%	0%	0%	0%	3%
Total		Count	352	38	58	21	176	175	202	25	233

AVERAGE AGE - TRACKING



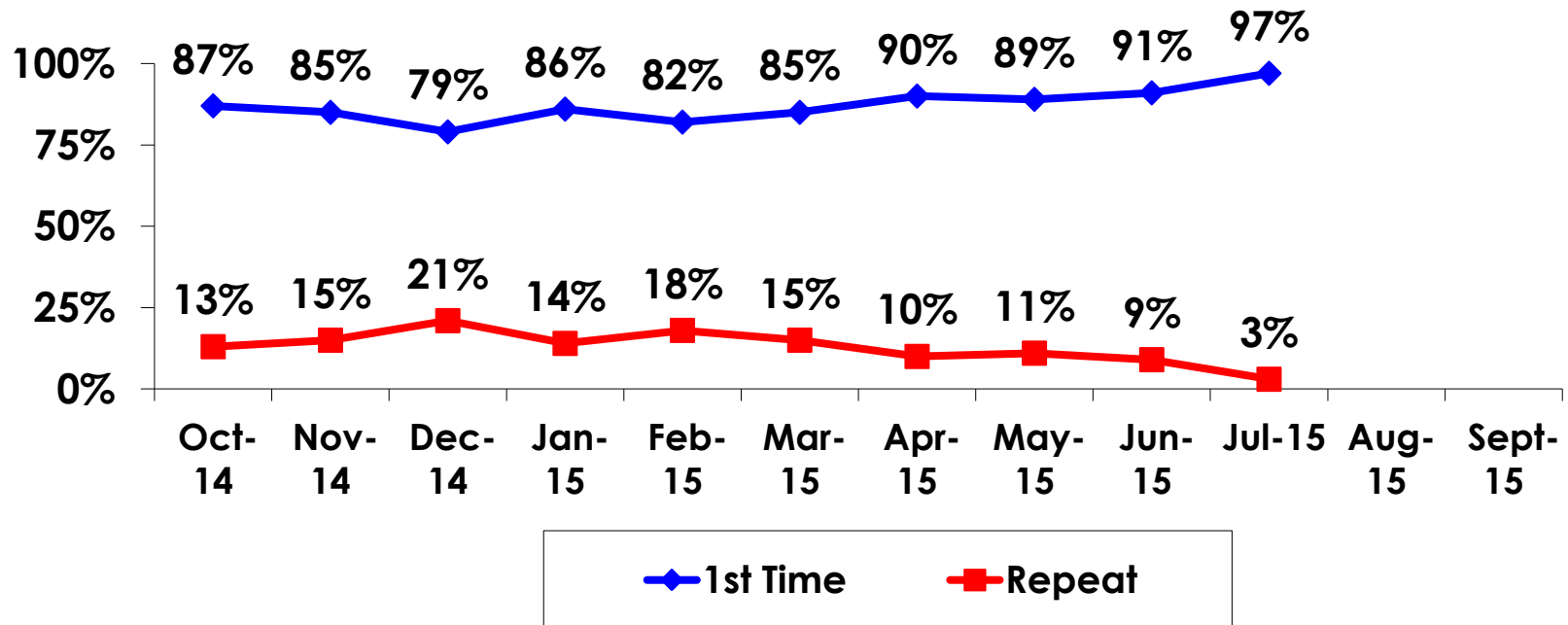
AGE- SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
QF	18-24	Count	1	0	0	0	1	0	0	0	1
		Column N %	0%	0%	0%	0%	1%	0%	0%	0%	0%
	25-34	Count	148	22	28	11	148	0	49	10	91
		Column N %	42%	58%	48%	52%	84%	0%	24%	40%	39%
	35-49	Count	199	16	29	10	27	172	152	15	138
		Column N %	57%	42%	50%	48%	15%	98%	76%	60%	59%
	50+	Count	3	0	1	0	0	3	0	0	3
		Column N %	1%	0%	2%	0%	0%	2%	0%	0%	1%
	Total	Count	351	38	58	21	176	175	201	25	233
QF	Mean		35.50	34.00	35.41	34.67	32.02	39.01	36.36	35.24	35.63
	Median		35	33	35	34	32	38	36	35	36

INCOME - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
Q26	KW12.0M-KW24.0M	Count	1	1	0	0	1	0	0	1	1
		Column N %	0%	3%	0%	0%	1%	0%	0%	4%	1%
	KW36.0M-KW48.0M	Count	67	10	10	5	60	7	21	2	40
		Column N %	24%	30%	21%	33%	43%	5%	13%	8%	21%
	KW48.0M-KW60.0M	Count	141	16	25	8	68	73	93	12	98
		Column N %	50%	48%	53%	53%	49%	51%	58%	48%	51%
	KW60.0M-KW72.0M	Count	69	6	12	2	10	59	45	9	52
		Column N %	24%	18%	26%	13%	7%	42%	28%	36%	27%
	KW72.0M+	Count	4	0	0	0	1	3	1	1	2
		Column N %	1%	0%	0%	0%	1%	2%	1%	4%	1%
Total		Count	282	33	47	15	140	142	160	25	193

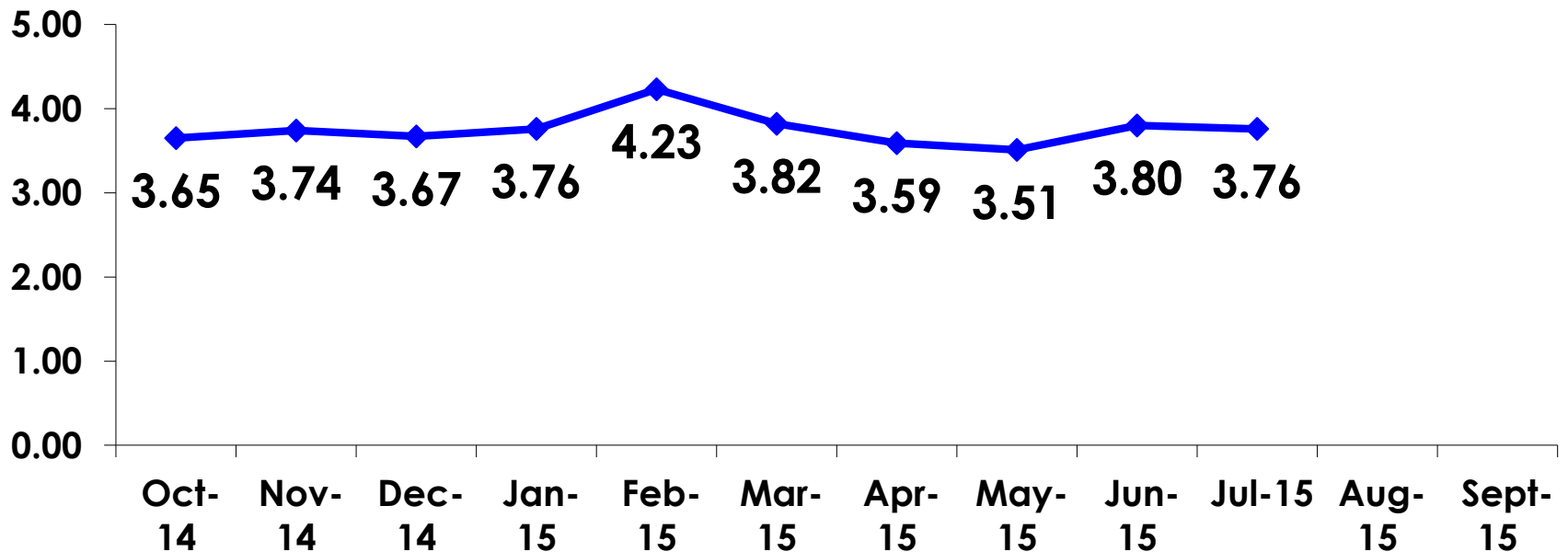
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
			-	N	-	TRVL	-	-	-	MISS	-
Q3A	Yes	Count	340	37	58	21	172	167	193	25	226
		Column N %	97%	97%	100%	100%	98%	95%	96%	100%	97%
	No	Count	12	1	0	0	4	8	9	0	7
		Column N %	3%	3%	0%	0%	2%	5%	4%	0%	3%
	Total	Count	352	38	58	21	176	175	202	25	233

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE	18-35	36-55	CHILD	GOLDEN	SPORT
		-	N	-	TRVL	-	-	-	MISS	-
Q8	Mean	3.76	3.84	3.82	3.67	3.82	3.70	3.73	3.64	3.76
	Median	4	4	4	4	4	4	4	4	4

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
			-	-	-	-	-	-	-	-	-
Q7	Full package tour	Count	313	35	53	17	154	158	188	25	207
		Column N %	93%	95%	93%	85%	91%	95%	98%	100%	94%
	Free-time package tour	Count	24	2	4	3	16	8	4	0	14
		Column N %	7%	5%	7%	15%	9%	5%	2%	0%	6%
	Total	Count	337	37	57	20	170	166	192	25	221

TRAVEL MOTIVATION - SEGMENTATION

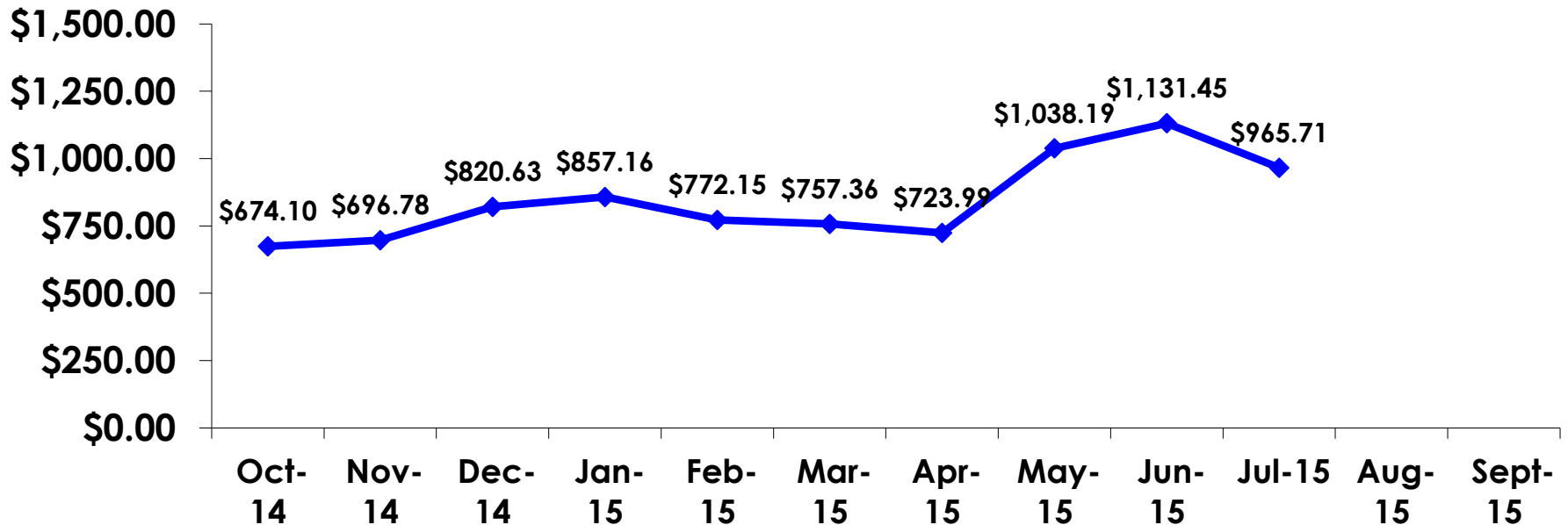
		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT	
		-	-	-	-	-	-	-	-	-	
Q5A	Previous trip	2%	0%	0%	0%	1%	2%	2%	0%	1%	
	Price	12%	5%	7%	5%	10%	14%	12%	4%	12%	
	Visit friends/ Relatives	9%	3%	10%	10%	12%	5%	7%	0%	6%	
	Recomm-friend/family/trvl agnt	11%	3%	14%	10%	11%	11%	13%	12%	9%	
	Scuba	14%	16%	14%	19%	15%	14%	13%	4%	22%	
	Water sports	16%	8%	14%	10%	15%	17%	19%	12%	24%	
	Short travel time	24%	24%	16%	14%	24%	25%	25%	16%	22%	
	Golf	15%	16%	16%	14%	14%	17%	13%	16%	23%	
	Relax	38%	32%	31%	5%	36%	39%	39%	68%	32%	
	Company/ Business Trip	18%	16%	17%	38%	19%	18%	18%	20%	17%	
	Company Sponsored	6%	5%	5%	100%	7%	5%	5%	0%	7%	
	Convention/ Trade/ Conference	11%	18%	16%	10%	9%	13%	10%	4%	12%	
	Safe	16%	8%	14%	0%	16%	15%	16%	20%	15%	
	Natural beauty	27%	26%	12%	48%	26%	29%	29%	20%	25%	
	Shopping	14%	11%	26%	14%	14%	14%	13%	20%	15%	
	Career Cert/ Testing	11%	8%	5%	10%	12%	10%	9%	8%	11%	
	Married/ Attn wedding	16%	5%	100%	14%	18%	15%	15%	24%	15%	
	Honeymoon	11%	100%	3%	10%	14%	8%	8%	20%	12%	
	Pleasure	8%	11%	3%	5%	10%	6%	9%	12%	8%	
	Organized sports	1%	0%	0%	0%	0%	1%	0%	0%	1%	
	Total	Count	352	38	58	21	176	175	202	25	233

INFORMATION SOURCES - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT	
		-	-	-	-	-	-	-	-	-	
Q1	Internet	98%	100%	100%	100%	98%	97%	98%	100%	97%	
	Travel Agent Brochure	35%	34%	47%	14%	32%	38%	35%	32%	35%	
	Friend/ Relative	16%	8%	12%	10%	14%	19%	15%	20%	15%	
	Magazine (Consumer)	14%	11%	19%	19%	15%	12%	12%	8%	14%	
	Newspaper	12%	16%	9%	5%	10%	14%	12%	16%	13%	
	Travel Guidebook- Bookstore	12%	11%	9%	19%	14%	9%	9%	12%	12%	
	TV	11%	21%	7%	33%	10%	11%	11%	16%	10%	
	Co-Worker/ Company Trvl Dept	7%	8%	7%	10%	6%	7%	6%	4%	8%	
	Radio	4%	3%	7%	0%	6%	2%	3%	16%	4%	
	GVB Office	3%	5%	5%	5%	3%	3%	4%	0%	4%	
	GVB Promo	3%	0%	3%	5%	3%	3%	2%	0%	3%	
	Prior Trip	3%	3%	0%	0%	2%	4%	4%	0%	3%	
	Travel Trade Show	3%	5%	5%	0%	3%	2%	2%	0%	2%	
	Theater Ad	1%	3%	0%	0%	1%	1%	2%	4%	0%	
	Consumer Trvl Show	1%	3%	3%	0%	1%	1%	0%	0%	1%	
	Total	Count	352	38	58	21	176	175	202	25	233

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$843.71

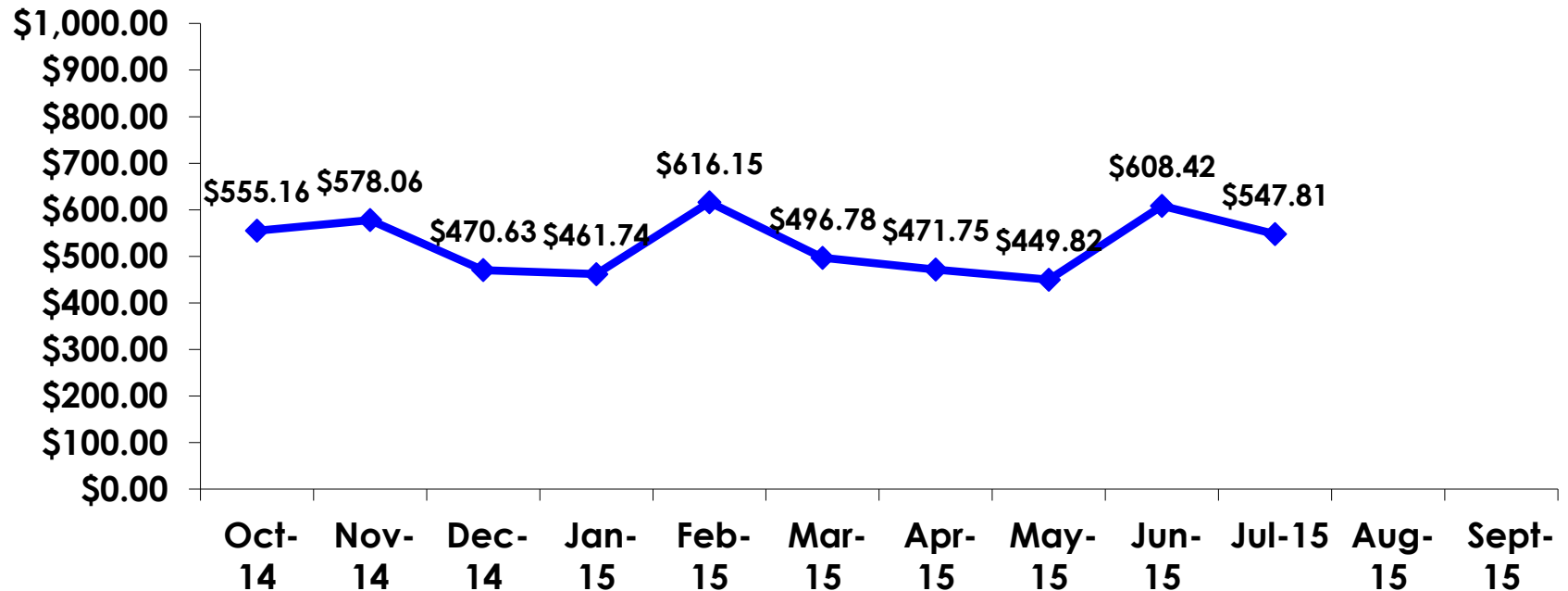
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$965.71	\$1,018.44	\$896.92	\$838.58	\$1,022.13	\$907.78	\$863.34	\$1,153.92	\$986.38
	Median	\$1,171	\$1,244	\$1,122	\$1,054	\$1,230	\$1,142	\$1,105	\$1,186	\$1,208
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,446	\$2,020	\$2,020	\$1,757	\$2,108	\$5,446	\$5,446	\$2,240	\$2,240

PREPAID EXPENSE- BREAKDOWN

		TOTAL	FAMILY/FIT	GROUP TRVL	ENG LANG LESSON	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$2,714.00	.	.	.	.	\$3,908.51	\$2,854.53	\$2,622.41	\$2,927.73	\$3,864.60	.	.	.	\$2,908.21
	Median	\$2,415	.	.	.	.	\$3,909	\$2,855	\$2,459	\$2,371	\$3,909	.	.	.	\$2,459
AIR/HOTEL/MEAL	Mean	\$4,068.35	.	.	.	\$3,744.24	\$4,234.42	\$3,820.68	\$3,557.54	\$4,571.61	\$4,625.18	.	\$4,399.23	.	\$4,110.00
	Median	\$3,865	.	.	.	\$3,513	\$3,865	\$3,601	\$3,425	\$4,392	\$4,128	.	\$4,128	.	\$3,952
AIR ONLY	Mean	\$966.15	.	.	.	.	\$1,053.98	\$702.65	\$966.15	.	.	.	.	.	\$966.15
	Median	\$790	.	.	.	.	\$1,054	\$703	\$790	.	.	.	.	.	\$966
HOTEL ONLY	Mean	\$878.32	.	.	.	.	\$1,053.98	\$526.99	\$878.32	.	.	.	.	.	\$790.49
	Median	\$1,054	.	.	.	.	\$1,054	\$527	\$1,054	.	.	.	.	.	\$790
HOTEL & MEAL	Mean	\$526.99	.	.	.	.	\$526.99	\$526.99	\$526.99	.	.	.	.	.	.
	Median	\$527	.	.	.	.	\$527	\$527	\$527	.	.	.	.	.	.
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- KOREA	Mean	\$144.23	.	.	.	\$90.97	\$96.61	\$87.83	\$141.29	\$146.98	\$123.16	.	\$87.83	.	\$147.83
	Median	\$88	.	.	.	\$88	\$88	\$88	\$88	\$88	\$88	.	\$88	.	\$88
TRANS- GUAM	Mean	.	.	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.	.	.
OPT TOURS	Mean	\$175.66	.	.	.	\$175.66	.	.	\$175.66	.	.	.	.	.	\$175.66
	Median	\$176	.	.	.	\$176	.	.	\$176	.	.	.	.	.	\$176
OTHER	Mean	\$503.74	.	.	.	\$164.68	\$158.10	\$263.50	\$200.06	\$845.38	\$136.63	.	\$307.41	.	\$628.34
	Median	\$88	.	.	.	\$88	\$88	\$263	\$88	\$88	\$88	.	\$307	.	\$88
TOTAL	Mean	\$3,005.99	.	.	.	\$2,715.85	\$3,011.27	\$2,222.98	\$2,708.81	\$3,281.90	\$3,331.30	.	\$4,110.53	.	\$3,076.37
	Median	\$3,294	.	.	.	\$3,162	\$3,513	\$2,635	\$2,811	\$3,865	\$3,821	.	\$4,084	.	\$3,513

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$525.60

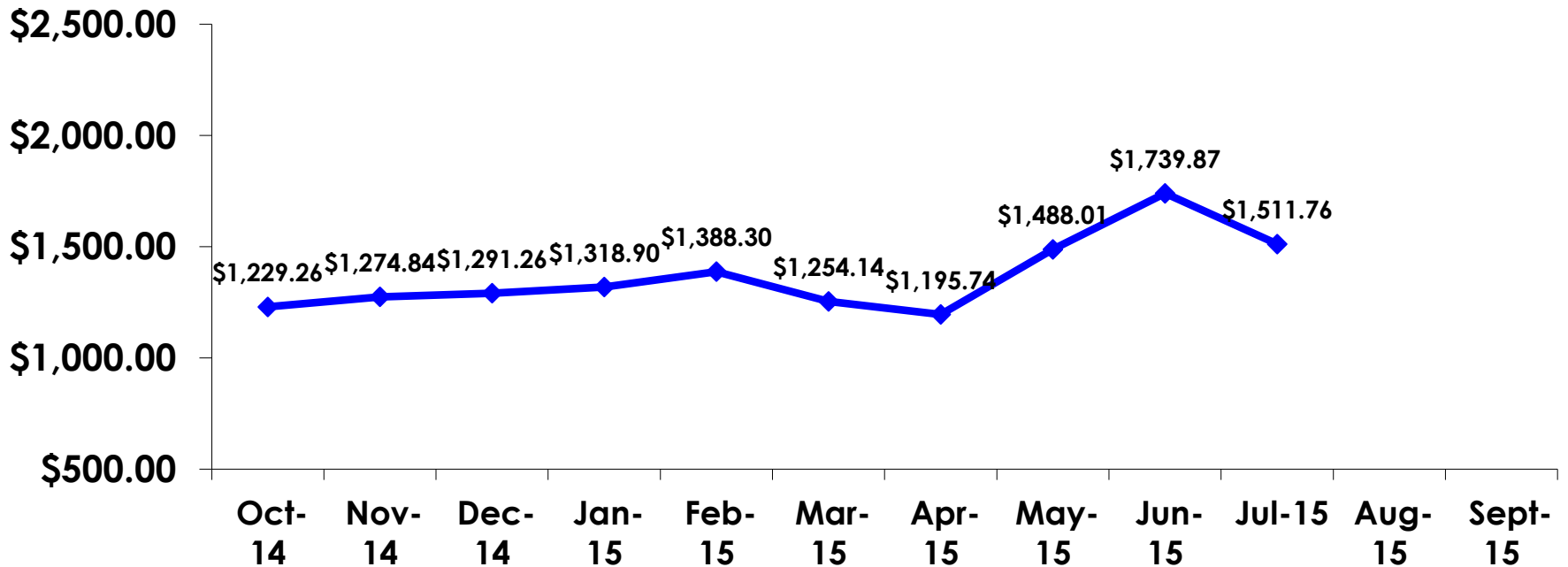
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$547.81	\$673.82	\$505.58	\$463.65	\$540.24	\$555.65	\$451.05	\$644.47	\$566.51
	Median	\$567	\$650	\$540	\$533	\$600	\$567	\$533	\$600	\$600
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$2,000	\$1,500	\$1,600	\$1,000	\$1,500	\$2,000	\$2,000	\$1,550	\$1,800

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY/FIT	GROUP TRVL	ENG LANG LESSON	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	FIT	GOLDEN MISS	SENIORS	SPORT
		-	-	-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$36.05	.	.	.	\$46.05	\$25.00	\$25.24	\$34.83	\$37.49	\$42.18	.	\$66.00	.	\$32.75
F&B FF/STORE	Mean	\$13.27	.	.	.	\$19.21	\$10.34	\$16.19	\$15.17	\$11.43	\$14.21	.	\$28.80	.	\$11.20
F&B RESTRNT	Mean	\$63.44	.	.	.	\$72.37	\$48.45	\$70.95	\$61.53	\$65.71	\$72.08	.	\$110.00	.	\$60.13
OPT TOUR	Mean	\$190.09	.	.	.	\$200.26	\$144.83	\$185.71	\$186.99	\$194.29	\$213.86	.	\$284.00	.	\$194.68
GIFT- SELF	Mean	\$142.90	.	.	.	\$197.37	\$98.28	\$95.24	\$138.64	\$148.00	\$156.44	.	\$180.00	.	\$133.69
GIFT- OTHER	Mean	\$159.89	.	.	.	\$201.32	\$107.76	\$90.48	\$152.27	\$168.46	\$169.70	.	\$152.00	.	\$141.76
TRANS	Mean	\$82.44	.	.	.	\$83.42	\$57.76	\$64.29	\$80.80	\$84.57	\$92.82	.	\$144.80	.	\$83.35
OTHER	Mean	\$933.10	.	.	.	\$853.95	\$1,047.24	\$704.29	\$747.56	\$1,107.89	\$944.55	.	\$1,194.40	.	\$1,059.87
TOTAL	Mean	\$1,627.05	.	.	.	\$1,688.16	\$1,539.66	\$1,252.38	\$1,420.28	\$1,827.14	\$1,713.91	.	\$2,156.00	.	\$1,719.31

TOTAL EXPENDITURES – TRACKING



YTD=\$1,369.11

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	HONEYMOON	WEDDING	INCENTIVE TRVL	18-35	36-55	CHILD	GOLDEN MISS	SPORT
		-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,511.76	\$1,692.26	\$1,390.50	\$1,302.24	\$1,559.18	\$1,463.44	\$1,314.39	\$1,798.38	\$1,552.89
	Median	\$1,671	\$1,811	\$1,545	\$1,317	\$1,738	\$1,595	\$1,515	\$1,830	\$1,730
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$550	\$0
	Maximum	\$5,446	\$3,476	\$2,870	\$2,757	\$3,476	\$5,446	\$5,446	\$3,790	\$3,996

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 2014, Jan, Feb, Mar, Apr, May, Jun, Jul 2015, and Overall Oct-2014 - Jul 2015											
Drivers:	Oct-14 rank	Nov-14 rank	Dec-14 rank	Jan-15 rank	Feb-15 rank	Mar-15 rank	Apr-15 rank	May-15 rank	Jun-15 rank	Jul-15 rank	Combine d Oct- 2014 - Aug 2015 rank
Quality & Cleanliness of beaches & parks	3	2	7				6		2		6
Ease of getting around											
Safety walking around at night			5		2	2		6			7
Quality of daytime tours									6		
Variety of daytime tours										5	
Quality of nighttime tours				4			3			3	2
Variety of nighttime tours					3			3			
Quality of shopping											
Variety of shopping	2		4			4		1	1	4	5
Price of things on Guam				5							
Quality of hotel accommodations			2		1		2	5	3	2	4
Quality/cleanliness of air, sky		4		3		5	4			7	8
Quality/cleanliness of parks							1				1
Quality of landscape in Tumon				1		1				1	10
Quality of landscape in Guam	1	1	3	6		3	5	4	4		3
Quality of ground handler		3	1								
Quality/cleanliness of transportation vehicles			6	2				2	5	6	9
% of Per Person On Island Expenditures Accounted For	36.8%	24.8%	52.2%	49.9%	31.0%	45.2%	43.6%	41.1%	62.1%	32.2%	40.8%

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 June 2015 Period. By rank order they are:
 - **Quality of landscape in Guam,**
 - **Quality of hotel accommodations,**
 - **Quality of nighttime tours**
 - **Variety of shopping,**
 - **Variety of daytime tours**
 - **Quality/cleanliness of transportation vehicles, and**
 - **Quality/cleanliness of air, sky.**
- With all six factors the overall r^2 is .322 meaning that **32.2% of overall satisfaction is accounted for by these factors.**

Comparison of Drivers of Per Person On-Island Expenditures, Oct, Nov, Dec 2014, Jan, Feb, Mar, Apr, May, Jun, Jul 2015 and Overall Oct-2014-Jul 2015

Drivers:	Oct-14 rank	Nov-14 rank	Dec-14 rank	Jan-15 rank	Feb-15 rank	Mar-15 rank	Apr-15 rank	May-15 rank	Jun-15 rank	Jul-15 rank	Combi ned Oct- 2014- Aug 2015 rank
Quality & Cleanliness of beaches & parks											4
Ease of getting around					3						1
Safety walking around at night					2	1					2
Quality of daytime tours											
Variety of daytime tours					1				1		6
Quality of nighttime tours			1								5
Variety of nighttime tours		2			4						
Quality of shopping		3	2						2		
Variety of shopping											
Price of things on Guam	2	1									3
Quality of hotel accommodations											
Quality/cleanliness of air, sky											
Quality/cleanliness of parks											
Quality of landscape in Tumon	1										9
Quality of landscape in Guam		4									8
Quality of ground handler							1				7
Quality/cleanliness of transportation vehicles											
% of Per Person On Island Expenditures Accounted For	6.6%	9.7%	2.4%	0.0%	5.7%	2.2%	10.0%	0.0%	15.8%	0.0%	1.8%

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 July 2015 Period.