

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2015 APRIL 2015



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 Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **352** departing Japanese 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 +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese 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 +/- 5.23 percentage points.



OBJECTIVES

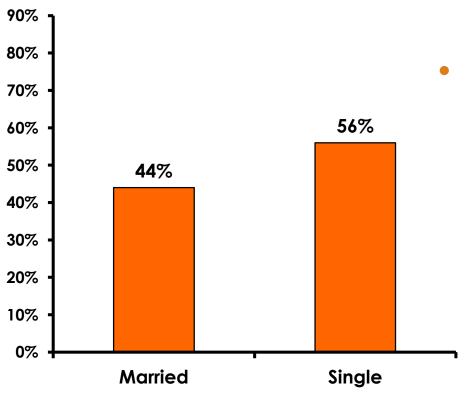
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.



SECTION 1 PROFILE OF RESPONDENTS



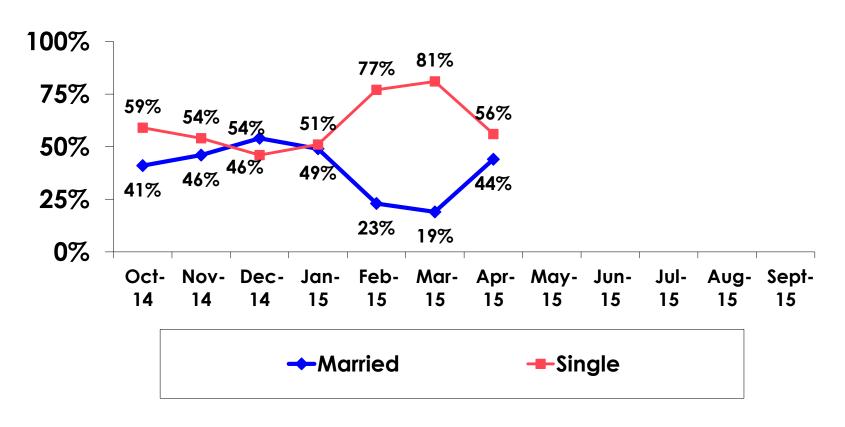
Marital Status - Overall



• 61% of first time visitors are single.

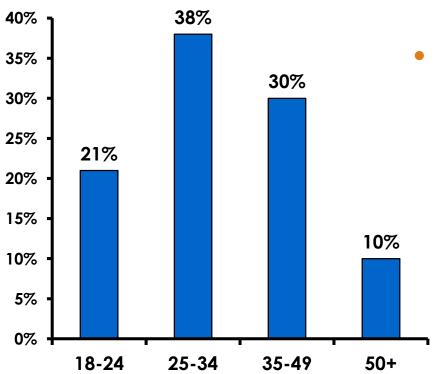


MARITAL STATUS





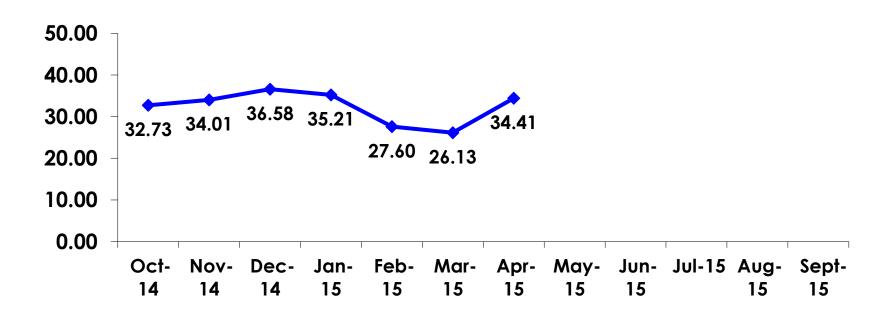
Age - Overall



• The average age of the respondents is 34.41 years of age.

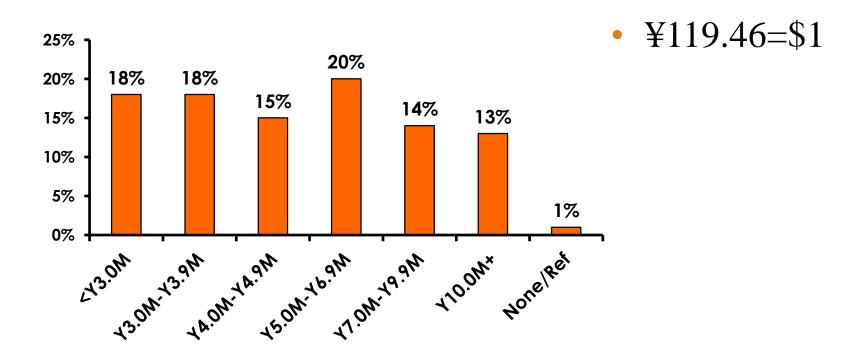


AVERAGE - AGE



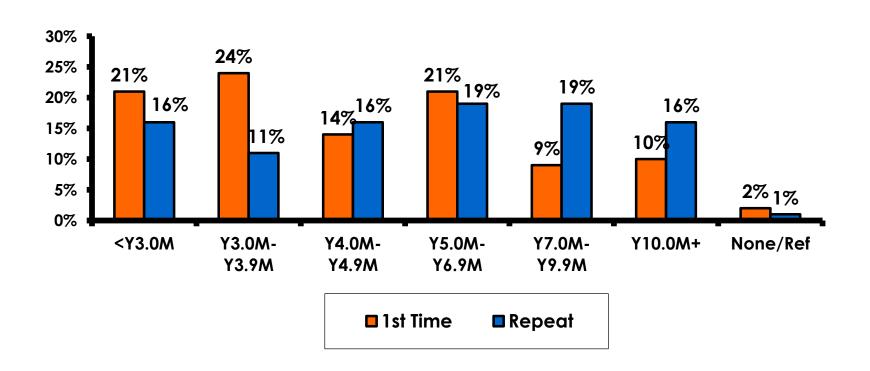


Personal Income





Personal Income – 1st time vs. repeat



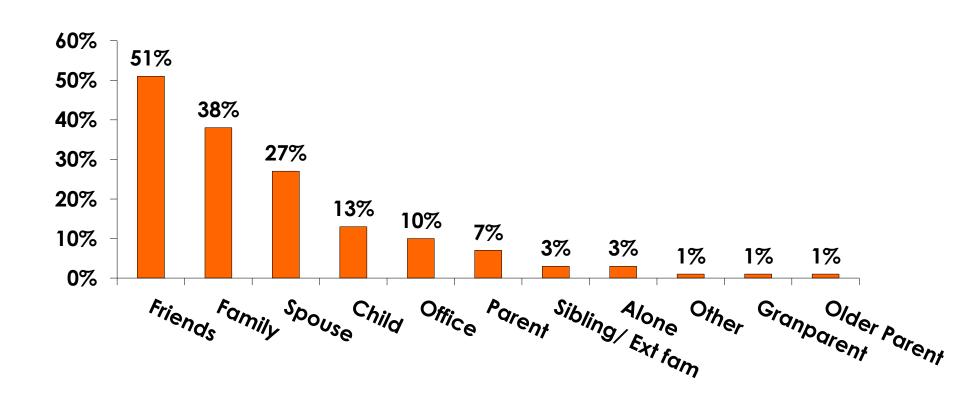


Personal Income by Gender & Age

			TOTAL	GEN	DER	AGE				
			-	Male	Female	18-24	25-34	35-49	50+	
Q26	<y2.0 million<="" td=""><td>Count</td><td>17</td><td>3</td><td>14</td><td>9</td><td>3</td><td>4</td><td>1</td></y2.0>	Count	17	3	14	9	3	4	1	
		Column N %	6%	2%	9%	18%	3%	4%	3%	
	Y2.0M-Y3.0M	Count	40	11	29	6	20	12	2	
		Column N %	13%	7%	19%	12%	17%	12%	6%	
	Y3.0M-Y4.0M	Count	56	26	30	7	35	10	4	
		Column N %	18%	17%	20%	14%	29%	10%	12%	
	Y4.0M-Y5.0M	Count	45	21	24	6	21	11	7	
		Column N %	15%	14%	16%	12%	18%	11%	21%	
	Y5.0M-Y7.0M	Count	61	35	26	5	23	24	9	
		Column N %	20%	23%	17%	10%	19%	24%	26%	
	Y7.0M-Y10.0M	Count	41	28	13	5	6	20	8	
		Column N %	14%	18%	9%	10%	5%	20%	24%	
	Y10.0M+	Count	39	29	10	8	11	17	3	
		Column N %	13%	19%	7%	16%	9%	17%	9%	
	No Income	Count	4	1	3	4				
		Column N %	1%	1%	2%	8%				
	Total	Count	303	154	149	50	119	98	34	



Travel Companions

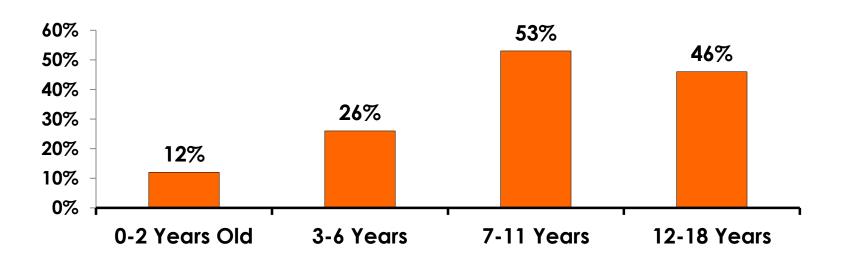




Number of Children Travel Party

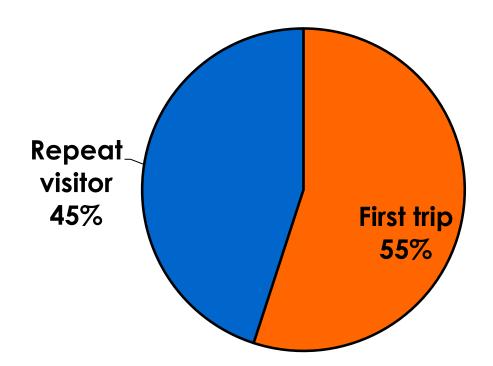
N=43 total respondents traveling with children.

(Of those N=43 respondents, there is a total of 74 children 18 years or younger)



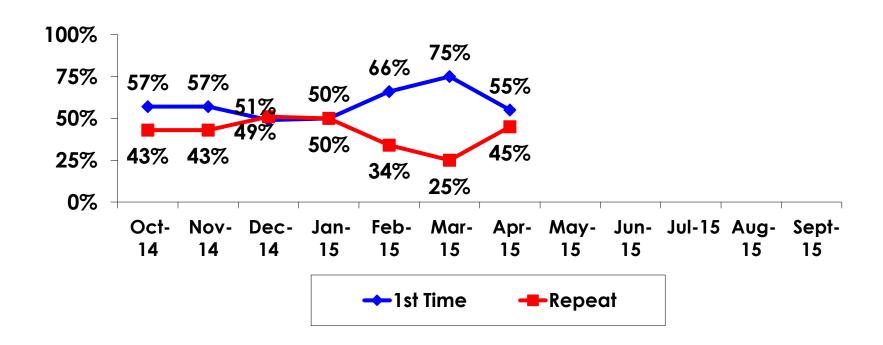


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

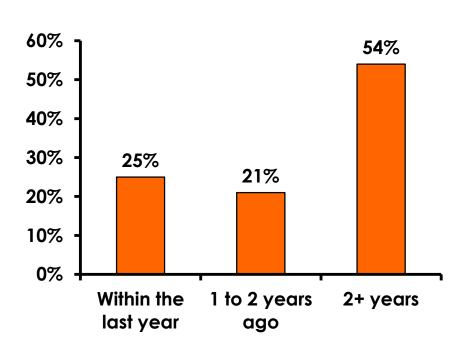
			TOTAL	TRIPS T	O GUAM
			-	1st	Repeat
GENDER	Male	Count	177	83	94
		Column N %	50%	43%	59%
	Female	Count	175	111	64
		Column N %	50%	57%	41%
	Total	Count	352	194	158
AGE	18-24	Count	75	51	24
		Column N %	21%	26%	15%
	25-34	Count	132	85	47
		Column N %	38%	44%	30%
	35-49	Count	106	46	60
		Column N %	30%	24%	38%
	50+	Count	36	11	25
		Column N %	10%	6%	16%
	Total	Count	349	193	156

 First-time visitors are younger than repeat visitors to Guam.



Repeat Visitors Last Trip

n = 152

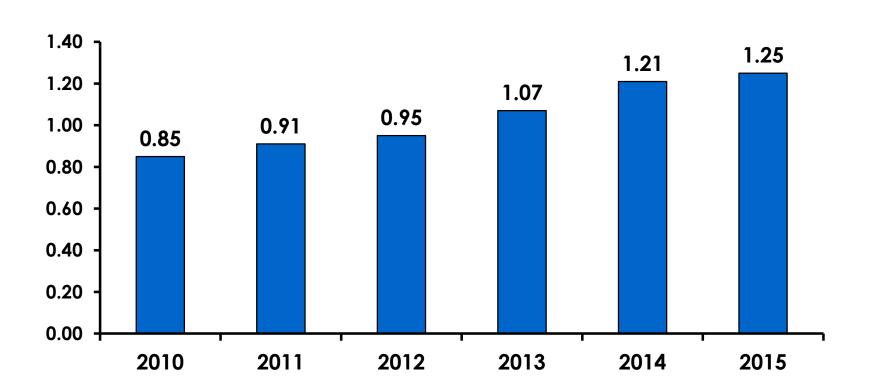


- The average repeat visitor has been to Guam 3.76 times.
- Half of repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

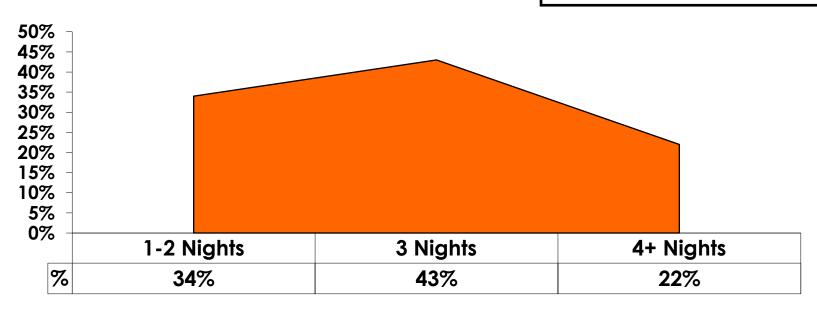
(2010-2015) (2 nights or more)





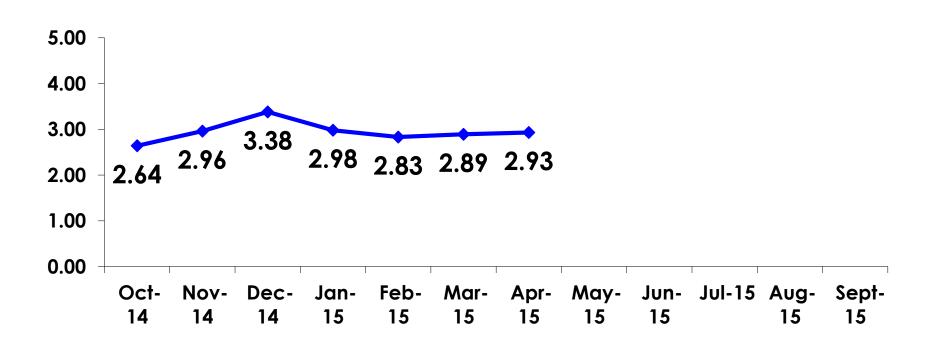
Length of Stay

Mean = 2.93 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

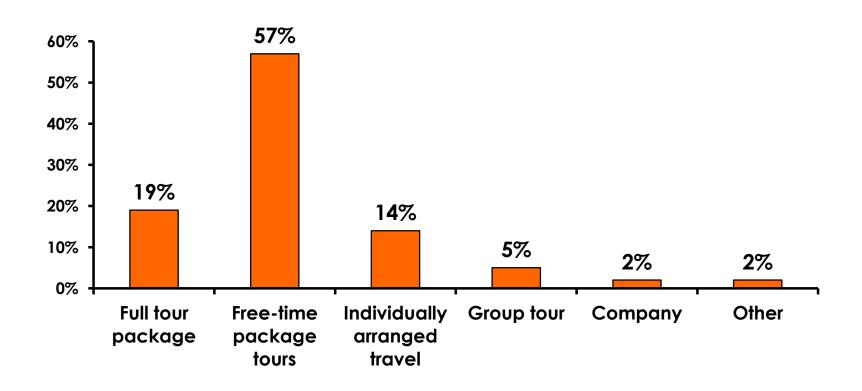
			TOTAL		Q26						
			-	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Engineer		22%	18%	26%	27%	31%	26%	15%	21%	
	Office worker non-mgr		15%	18%	15%	14%	11%	15%	22%	10%	
	Salesperson		13%		8%	16%	18%	10%	22%	15%	
	Self-employed		10%	6%	5%	11%	13%	11%	12%	15%	
	Student		7%	18%				2%	5%	8%	50%
	Homemaker		6%		3%	5%	7%	11%	10%	3%	
	Skilled worker		5%	6%	10%	5%	9%		2%	5%	
	Freeter		4%	24%	13%	2%	2%			3%	25%
	Other		4%	6%	10%	2%		3%	5%	3%	
	Manager		3%			2%		8%	2%	5%	
	Professional/ Specialist		3%		3%	9%		2%		3%	
	Executive (30+ employees)		3%		3%		2%	2%	2%	8%	25%
	Unemployed		2%		3%	2%	2%	3%		3%	
	Govt- office worker non- mgr		1%	6%		2%		2%	2%		
	Govt- Manager		1%			2%	2%	2%			
	Retired		1%		3%			2%			
	Teacher		1%			2%	2%				
	Free-lancer		0%					2%			
	Total	Count	334	17	39	56	45	61	41	39	4



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





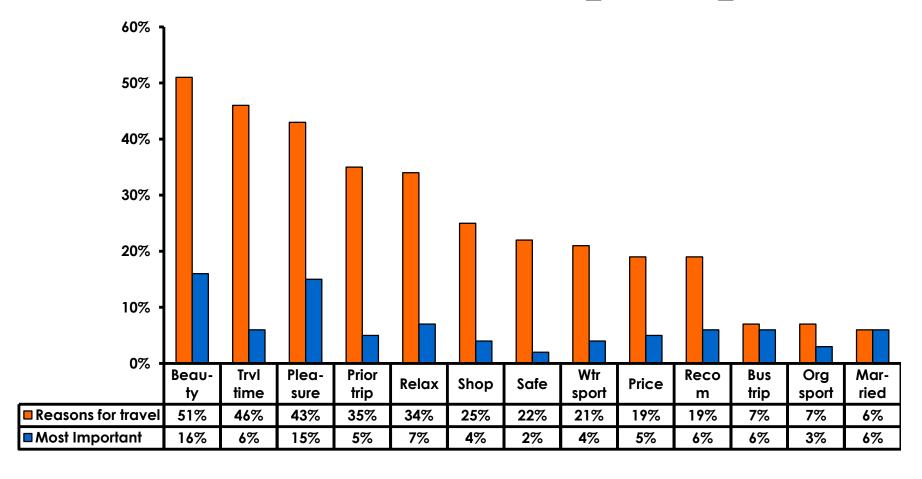
Accommodation by Income

Average length of stay: 2.93 days

			TOTAL				Q26				
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q9	Guam Plaza Hotel		11%	18%	23%	11%	11%	5%	7%	13%	
	Fiesta Resort Guam		9%		13%	18%	7%	11%	5%	5%	
	Onward Beach Resort		7%	12%	5%	4%	7%	11%	15%	5%	
	Grand Plaza Hotel		7%	6%	5%	9%	7%	5%	2%	8%	
	Hotel Nikko Guam		7%		8%	4%	4%	10%	12%	8%	
	Holiday Resort Guam		7%	12%	3%	11%	4%	8%	2%	5%	25%
	PIC Club		6%	6%	8%	5%		5%	10%	8%	
	Guam Reef & Olive Spa		5%		5%	9%		5%	10%		50%
	Outrigger Guam Resort		5%	12%		5%	13%	3%	7%	3%	
	Bayview Hotel		4%	6%	13%		2%	7%	2%	5%	
	Pacific Bay Hotel		4%		5%	11%		3%	7%	3%	
	Hyatt Regency Guam		4%			4%	2%	5%	5%		
	Leo Palace Resort		4%	6%			9%	3%	7%	3%	
	Hilton Guam Resort		4%		3%		9%	7%		11%	
	Oceanview Hotel		3%	6%		4%	2%		5%	5%	
	Royal Orchid Guam		3%			2%	9%			5%	
	Pacific Star Resort & Spa		3%		3%	2%	4%	5%		3%	
	Other		2%	6%	5%	2%	2%				
	Westin Resort Guam		2%	6%		2%	2%	2%			
	Hotel Santa Fe		1%	6%				2%		5%	
	Sheraton Laguna Guam		1%		3%		4%	2%		3%	
	Condo		1%		3%				2%	3%	
	Verona Resort & Spa		1%								25%
	Aqua Suites		0%					2%			
	Lotte Hotel Guam		0%								
	Total	Count	351	17	40	56	45	61	41	38	4



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches
- Pleasure
- The ability to relax
 were the primary reasons for visiting during
 this period.



Motivation by Age & Gender

			TOTAL		AG	GENDER			
			-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty		51%	61%	50%	52%	33%	44%	58%
	Short travel time		46%	35%	52%	49%	42%	43%	49%
	Pleasure		43%	47%	45%	41%	36%	34%	51%
	Previous trip		35%	20%	30%	42%	61%	38%	31%
	Relax		34%	27%	40%	34%	31%	32%	37%
	Shopping		25%	25%	31%	19%	19%	19%	31%
	Safe		22%	20%	19%	27%	28%	23%	22%
	Water sports		21%	15%	24%	24%	17%	18%	24%
	Price		19%	23%	23%	16%	8%	20%	18%
	Recomm- friend/family/trvl agnt		19%	21%	24%	14%	11%	15%	23%
	Company/ Business Trip		7%	4%	7%	10%	6%	10%	4%
	Organized sports		7%	5%	8%	5%	11%	6%	8%
	Married/ Attn wedding		6%	5%	5%	7%	8%	7%	6%
	Golf		6%		5%	7%	19%	10%	1%
	Other		5%	1%	3%	10%	8%	6%	5%
	Honeymoon		5%	4%	8%	3%	3%	9%	1%
	Scuba		4%	3%	4%	5%	3%	3%	5%
	Visit friends/ Relatives		3%	1%	1%	3%	11%	3%	2%
	Career Cert/ Testing		1%	1%	1%	2%		1%	2%
	Company Sponsored		1%	1%	1%	1%		1%	1%
	Convention/Trade/ Conference		1%		1%		3%	1%	1%
	Total	Count	350	75	131	105	36	177	173



Motivation by Income

			TOTAL				Q26				
			•	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q5A	Natural beauty		51%	56%	60%	45%	49%	54%	56%	54%	50%
	Short travel time		46%	19%	53%	45%	47%	51%	56%	44%	25%
	Pleasure		43%	44%	45%	47%	44%	38%	56%	33%	50%
	Previous trip		35%	31%	33%	25%	40%	30%	61%	36%	
	Relax		34%	19%	50%	36%	29%	33%	56%	31%	
	Shopping		25%	31%	30%	24%	22%	18%	32%	21%	
	Safe		22%	25%	25%	27%	31%	16%	34%	21%	
	Water sports		21%	19%	25%	22%	29%	20%	27%	10%	50%
	Price		19%	19%	28%	29%	18%	13%	22%	15%	
	Recomm- friend/family/trvl agnt		19%	38%	20%	24%	18%	18%	17%	18%	
	Company/ Business Trip		7%	6%	5%	9%	9%	5%	2%	10%	
	Organized sports		7%	6%	5%	11%		5%	12%	10%	
	Married/ Attn wedding		6%	6%	13%	7%	4%	7%	2%	5%	
	Golf		6%	6%		2%	9%	7%	10%	13%	
	Other		5%	6%	5%	7%	2%	3%	5%	13%	
	Honeymoon		5%			9%	9%	5%	5%		
	Scuba		4%	6%	8%		2%	5%		3%	
	Visit friends/ Relatives		3%	6%		2%		3%	10%		
	Career Cert/ Testing		1%	6%	3%				2%		
	Company Sponsored		1%			2%			2%		25%
	Convention/ Trade/ Conference		1%				2%		2%		
	Total	Count	350	16	40	55	45	61	41	39	4



SECTION 3 EXPENDITURES

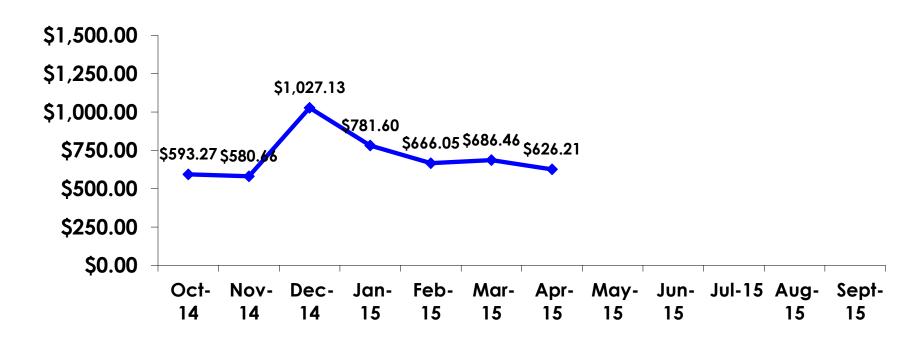


Prepaid Expenditures ¥119.46/US\$1

- \$1,177.07 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$12,557 = maximum (highest amount recorded for the entire sample)
- \$626.21 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$708.81



Breakdown of Prepaid Expenditures ¥119.46=\$1

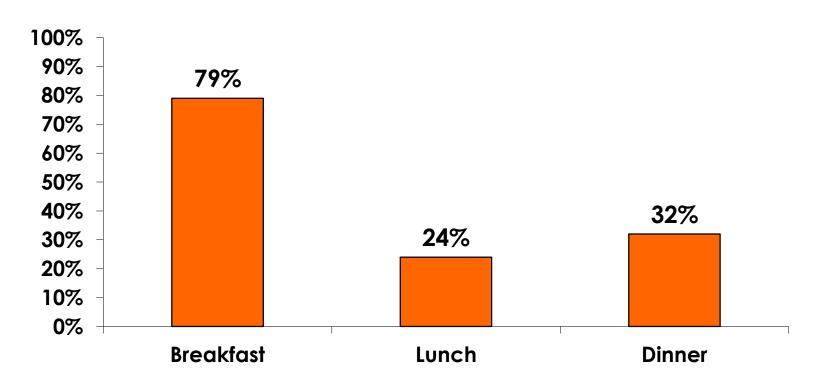
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,137.42
Air & Accommodation w/ daily meal package	\$2,152.23
Air only	\$872.33
Accommodation only	\$534.49
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$-
Ground transportation – Japan	\$61.66
Ground transportation – Guam	\$73.00
Optional tours/ activities	\$297.46
Other expenses	\$368.92
Total Prepaid	\$1,177.07



PREPAID MEAL BREAKDOWN

Air/Accommodations with Daily Meal Pkg. n=34



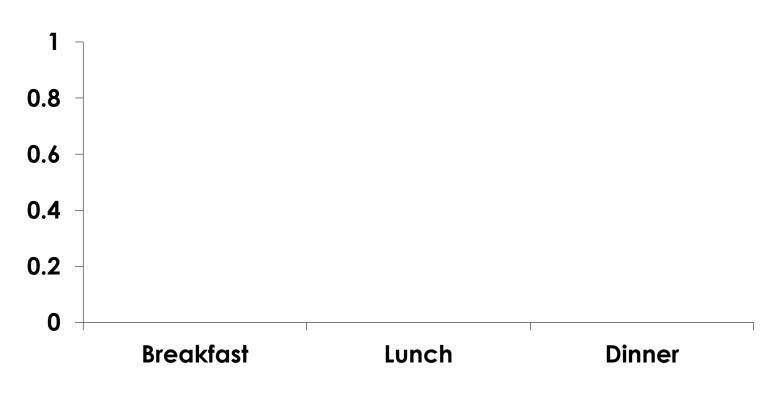
Mean=\$2,152.23 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.



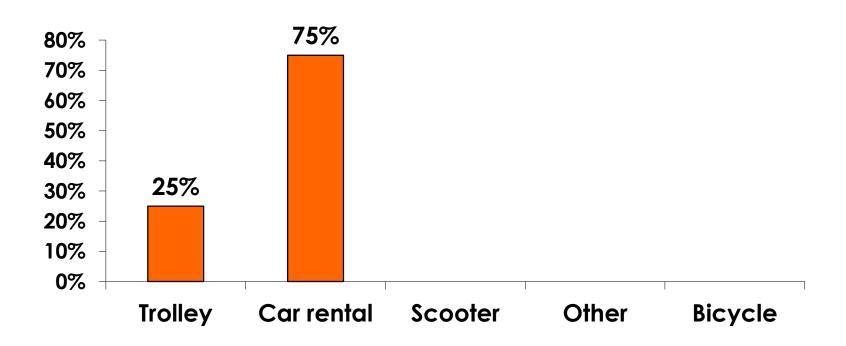


Mean=\$xxx per travel party



PREPAID GROUND TRANSPORTATION

n=4



Mean=\$73.00 per travel party

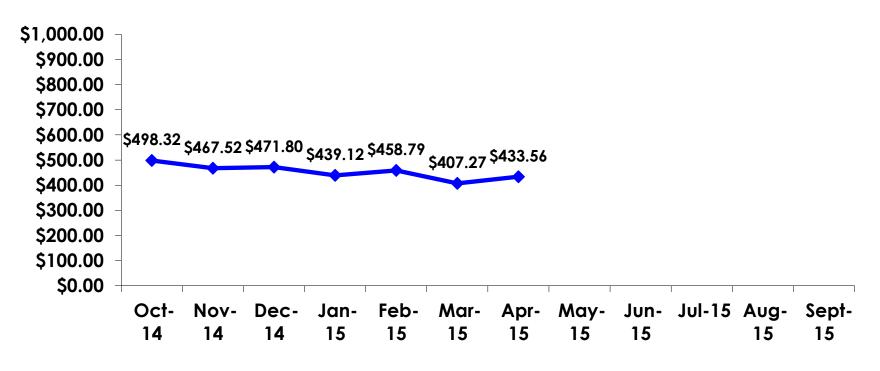


On-Island Expenditures

- \$669.66 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,000 = Maximum (highest amount recorded for the entire sample)
- \$433.56 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person



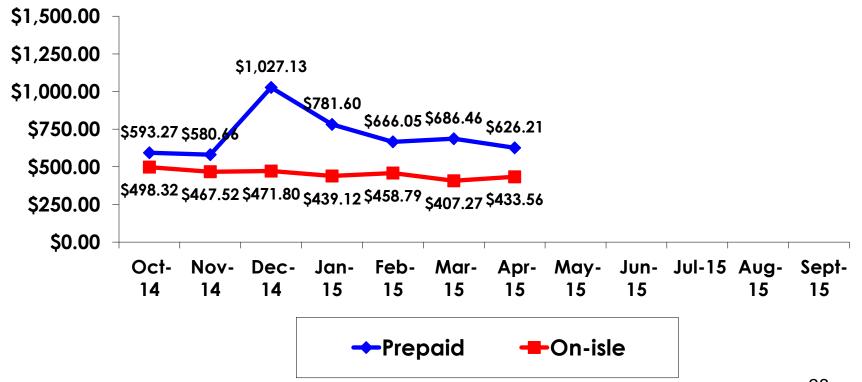
YTD = \$453.72



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$708.81

On-Isle YTD = \$453.72





Total On-Island Expenditure by Gender & Age

	TOTAL GENDER				GENDER								
						Ma	ile		Female				
					AGE				AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
PER PERSON	Mean	\$433.56	\$418.17	\$449.12	\$381.45	\$470.61	\$373.75	\$462.44	\$389.38	\$474.84	\$514.30	\$342.43	
	Median	\$330	\$300	\$350	\$280	\$333	\$300	\$288	\$325	\$380	\$400	\$275	
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$100	\$0	
	Maximum	\$3,000	\$3,000	\$3,000	\$1,500	\$3,000	\$1,600	\$1,600	\$1,250	\$2,000	\$3,000	\$1,000	



On-Island Expenditure Categories by Gender & Age

		TOTAL	OTAL GENDER			AG	E	
		1	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$30.57	\$36.16	\$24.90	\$20.69	\$24.90	\$31.59	\$63.08
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.64	\$36.23	\$24.98	\$38.00	\$24.25	\$35.82	\$23.22
	Median	\$0	\$0	\$0	\$0	\$0	\$10	\$0
F&B RESTRNT	Mean	\$79.18	\$98.33	\$59.80	\$49.93	\$83.98	\$102.64	\$57.22
	Median	\$5	\$40	\$0	\$0	\$43	\$50	\$0
OPT TOUR	Mean	\$53.99	\$68.55	\$39.26	\$43.20	\$54.98	\$64.44	\$46.56
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$158.61	\$156.18	\$161.07	\$131.37	\$175.29	\$164.71	\$146.67
	Median	\$10	\$0	\$30	\$0	\$20	\$30	\$0
GIFT- OTHER	Mean	\$94.77	\$86.95	\$102.69	\$80.67	\$107.52	\$99.69	\$68.06
	Median	\$40	\$20	\$50	\$20	\$50	\$50	\$0
TRANS	Mean	\$13.24	\$16.69	\$9.75	\$7.25	\$11.01	\$19.46	\$16.67
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$209.82	\$226.70	\$192.74	\$154.61	\$149.20	\$289.12	\$308.81
	Median	\$0	\$0	\$0	\$36	\$0	\$0	\$0
TOTAL	Mean	\$669.66	\$723.82	\$614.88	\$527.60	\$631.95	\$800.41	\$733.06
	Median	\$500	\$570	\$410	\$346	\$500	\$600	\$500



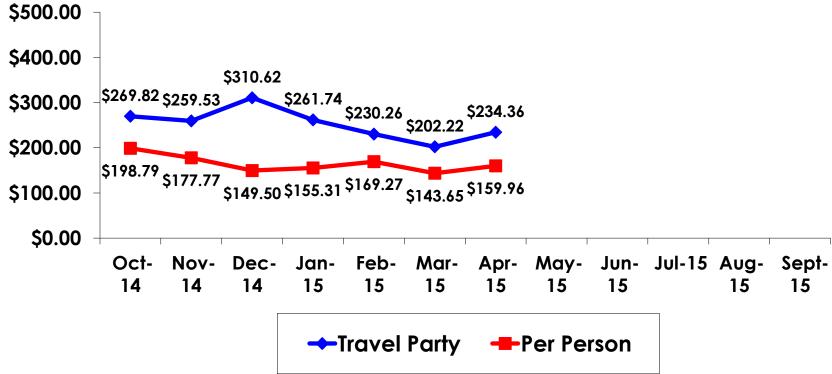
On-Island Expenditures First Timers & Repeaters

		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$30.57	\$29.76	\$31.56
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$30.64	\$32.45	\$28.41
	Median	\$0	\$0	\$0
F&B RESTRNT	Mean	\$79.18	\$70.95	\$89.27
	Median	\$ 5	\$0	\$20
OPT TOUR	Mean	\$53.99	\$50.19	\$58.65
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$158.61	\$151.49	\$167.35
	Median	\$10	\$15	\$0
GIFT- OTHER	Mean	\$94.77	\$106.79	\$80.01
	Median	\$40	\$50	\$20
TRANS	Mean	\$13.24	\$13.12	\$13.39
	Median	\$0	\$0	\$0
OTHER	Mean	\$209.82	\$182.14	\$243.79
	Median	\$0	\$0	\$0
TOTAL	Mean	\$669.66	\$637.71	\$708.89
	Median	\$500	\$500	\$500



ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$252.60 Per Person YTD = \$164.86



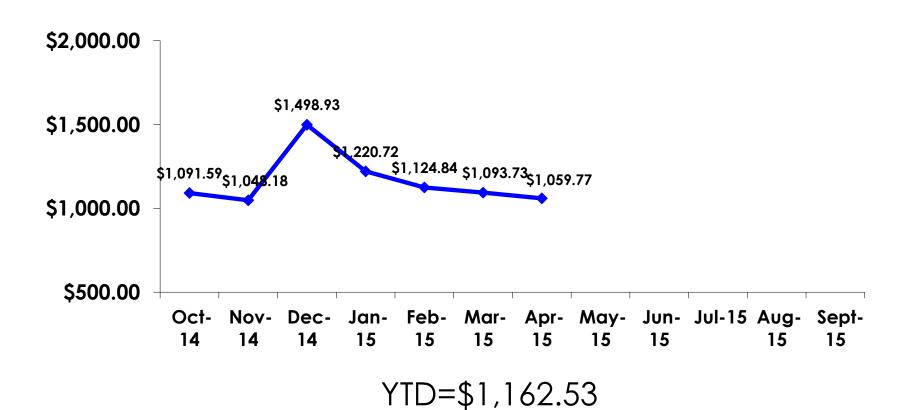


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,059.77 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$4,172 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



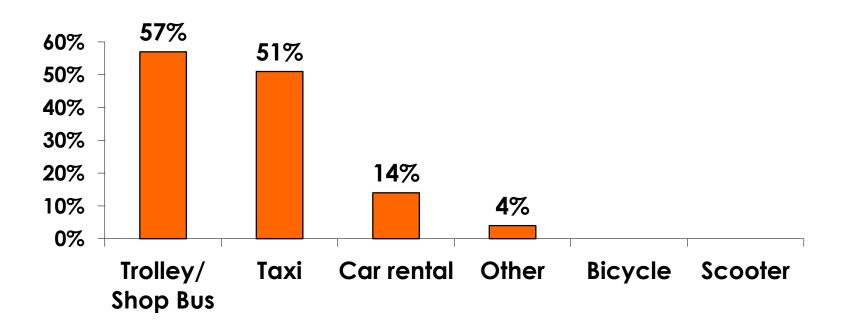


Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$30.57
Food & beverage in fast food restaurant/convenience store	\$30.64
Food & beverage at restaurants or drinking establishments outside a hotel	\$79.18
Optional tours and activities	\$53.99
Gifts/ souvenirs for yourself/companions	\$158.61
Gifts/ souvenirs for friends/family at home	\$94.77
Local transportation	\$13.24
Other expenses not covered	\$209.82
Average Total	\$669.66



Local Transportation_{n=72}



Mean=\$13.24 per travel party



Guam Airport Expenditures

- \$31.36 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,000 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

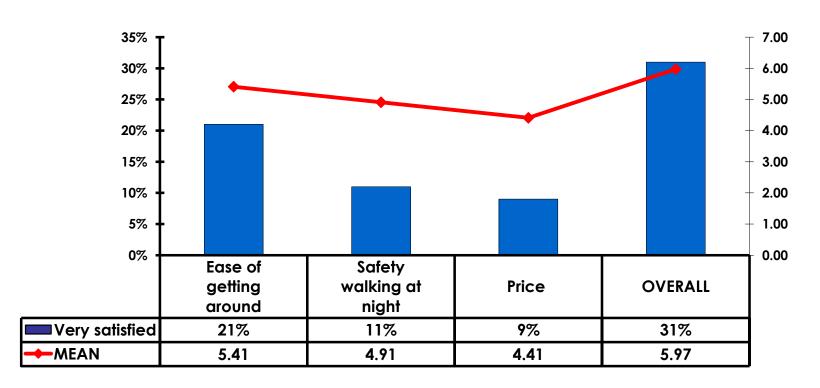
	MEAN \$
Food & Beverages	\$9.41
Gifts/Souvenirs Self	\$11.74
Gifts/Souvenirs Others	\$10.21
Total	\$31.36



SECTION 4 VISITOR SATISFACTION

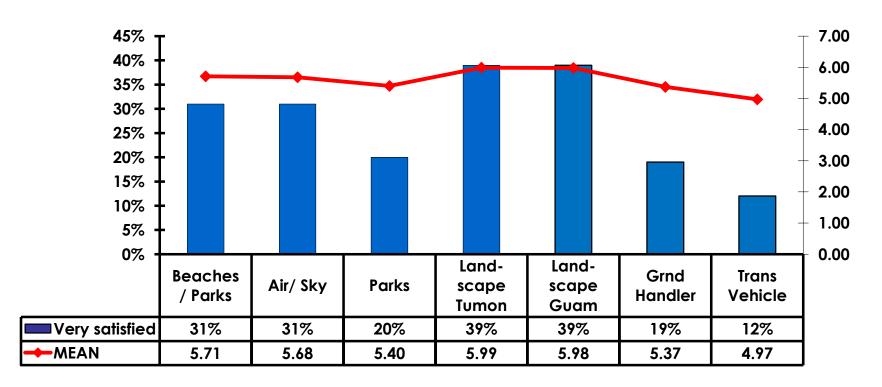


Satisfaction Scores Overall



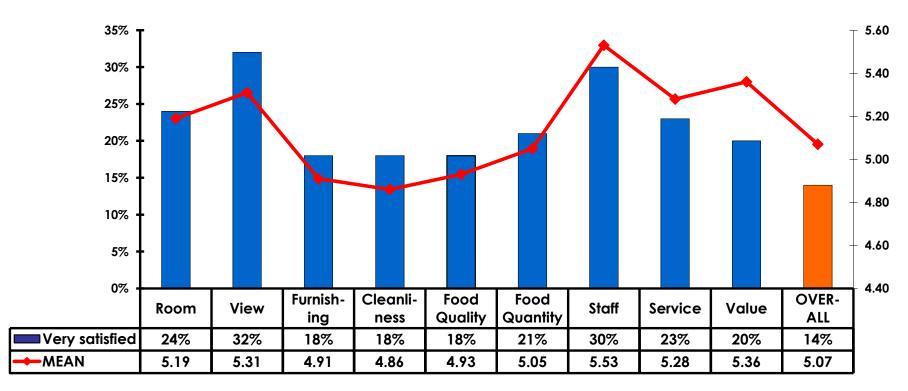


Satisfaction Quality/ Cleanliness



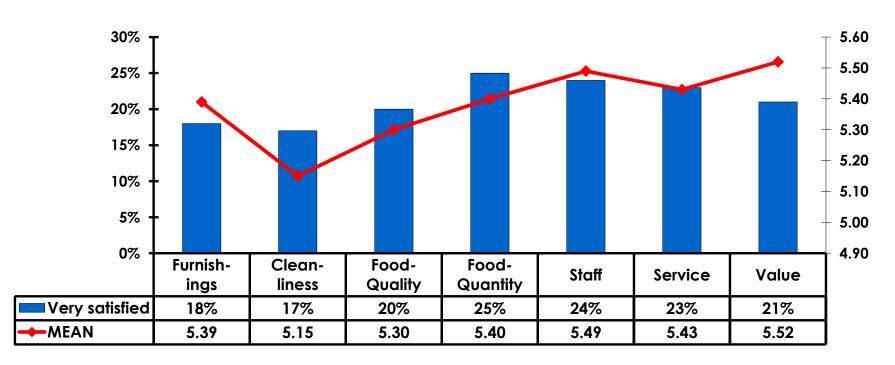


Quality of Accommodations



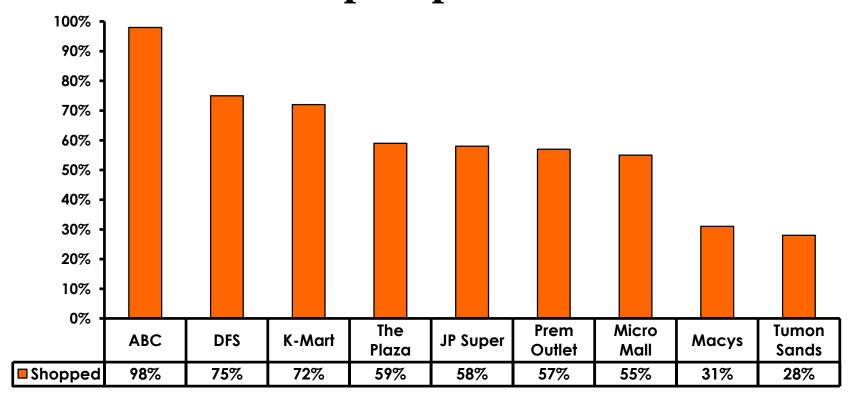


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



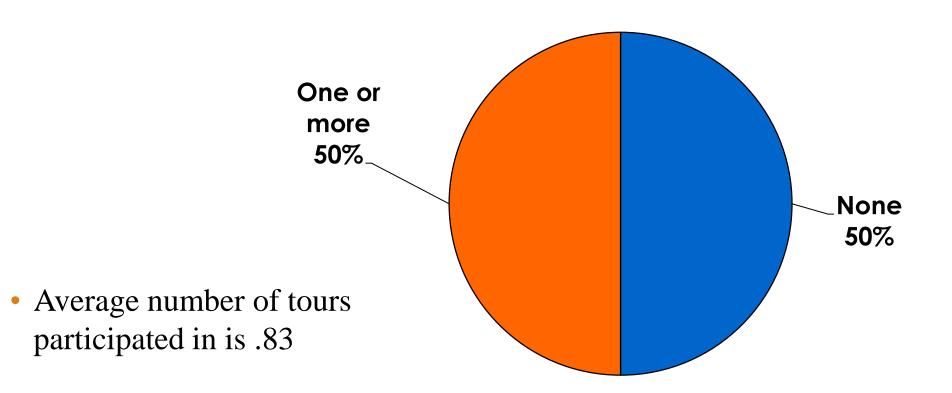


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 48%	Score of 6 to 7 = 48%
Score of 4 to 5 = 46%	Score of 4 to 5 = 45 %
Score 1 to 3 = 6 %	Score 1 to 3 = 8%
MEAN = 5.30	MEAN = 5.21

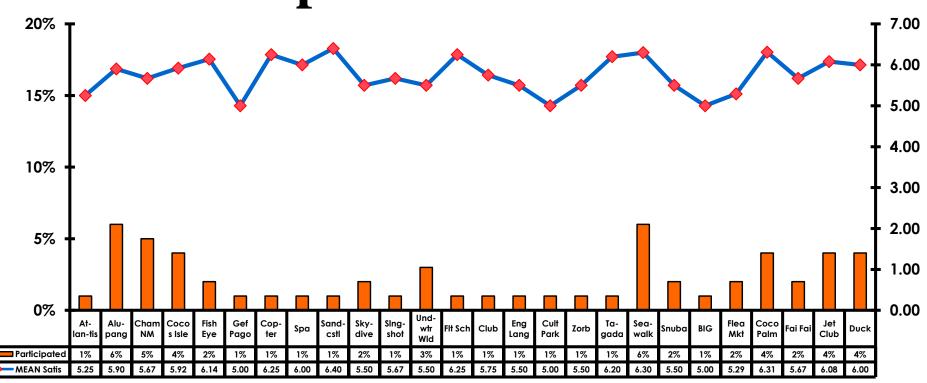


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 52 %	Score of 6 to 7 = 50%
Score of 4 to 5 = 47%	Score of 4 to 5 = 49%
Score 1 to 3 = 0 %	Score 1 to 3 = 1%
MEAN = 5.81	MEAN = 5.37

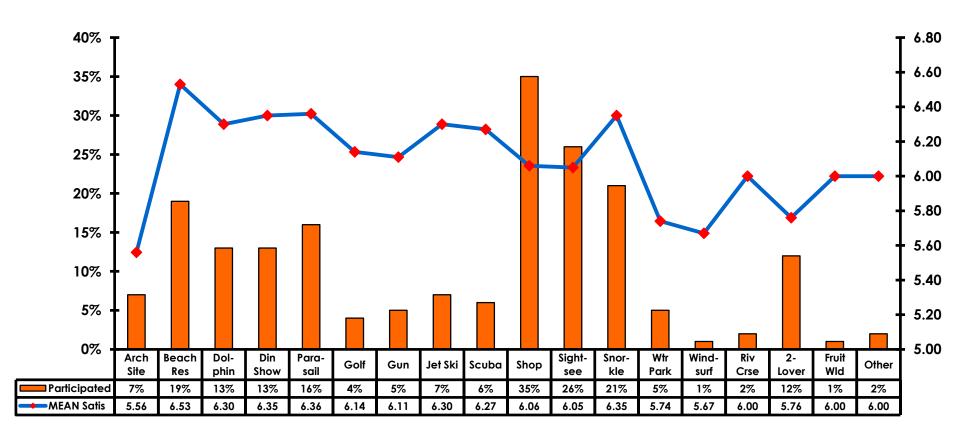


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 29%	Score of 6 to 7 = 29%
Score of 4 to 5 = 70%	Score of 4 to 5 = 69%
Score 1 to 3 = 1%	Score 1 to 3 = 3 %
MEAN = 4.78	MEAN = 4.78

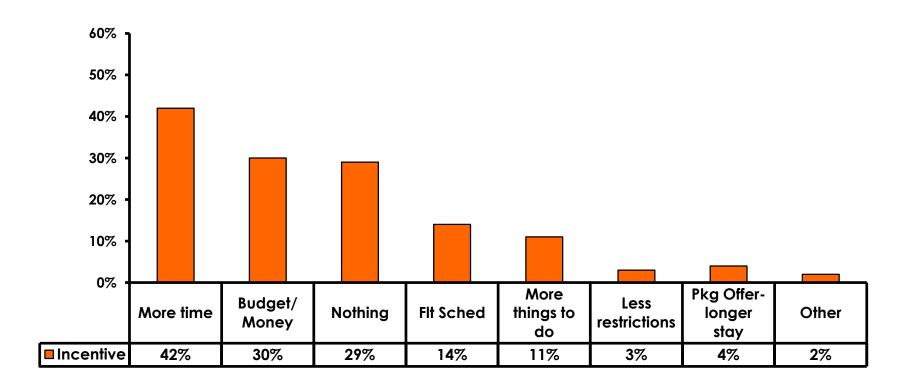


Satisfaction with Other Activities





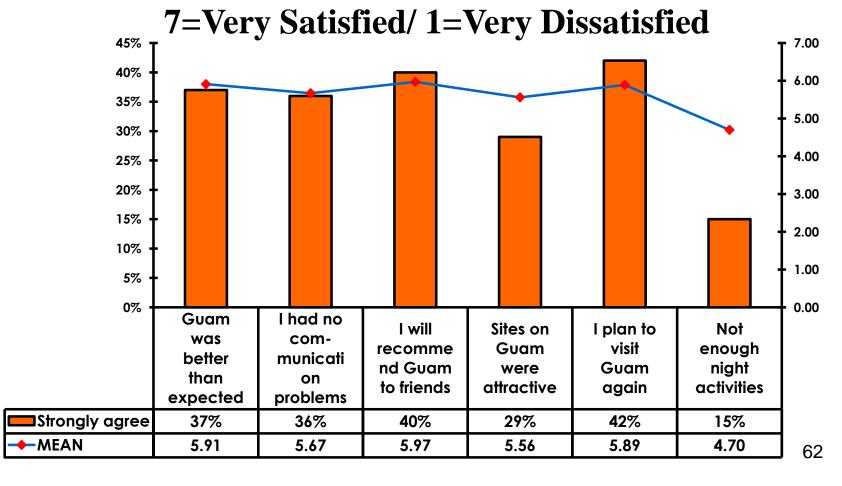
What would it take to make you want to stay an extra day in Guam?





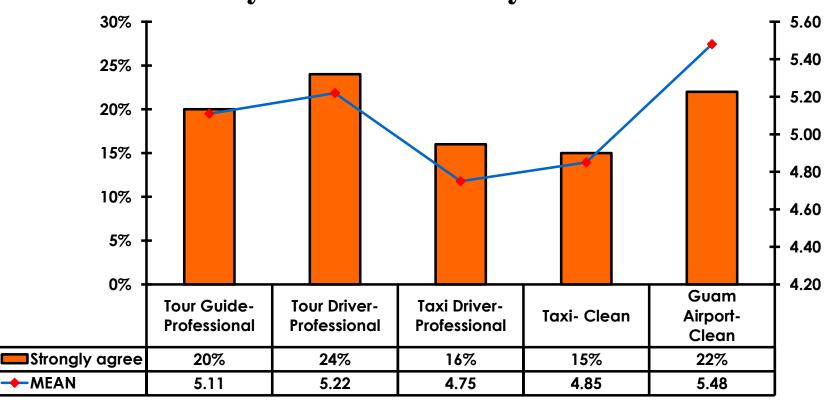
On-Island Perceptions

7pt Rating Scale





On-Island Perceptions

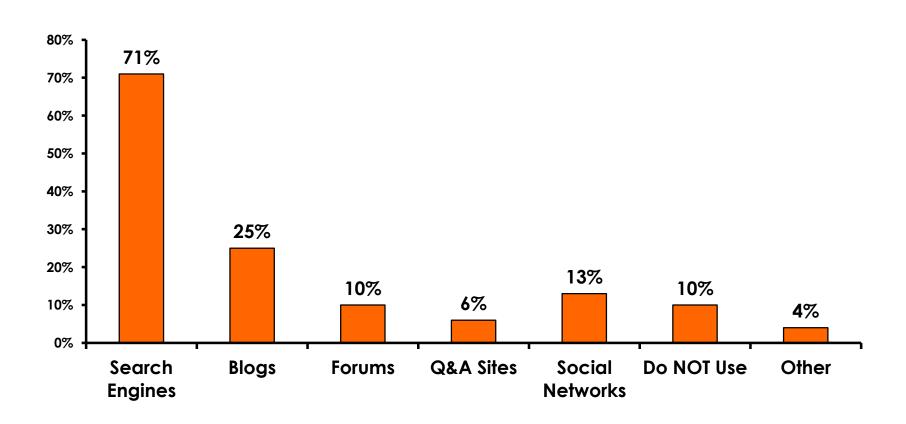




SECTION 5 PROMOTIONS

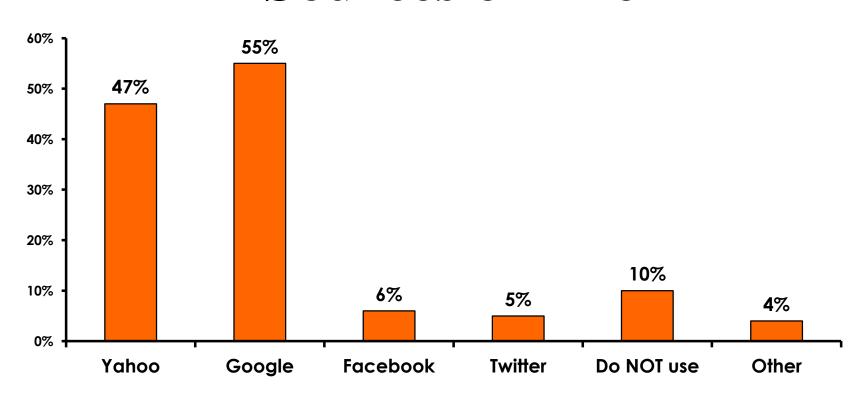


Internet- Guam Sources of Info



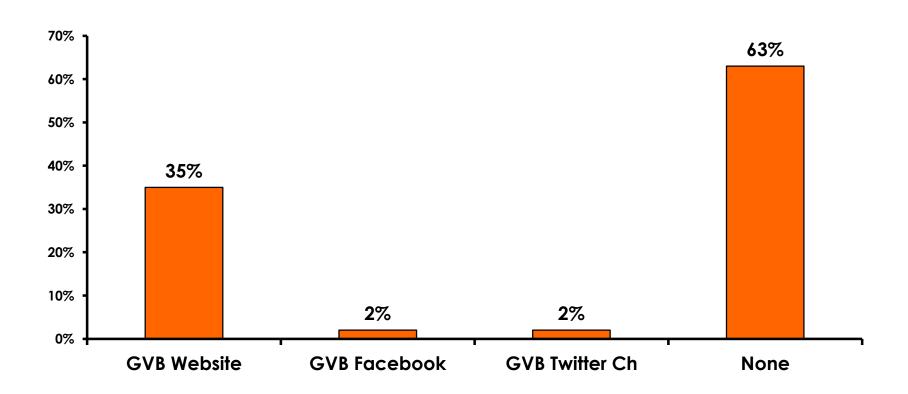


Internet- Things To Do Sources of Info



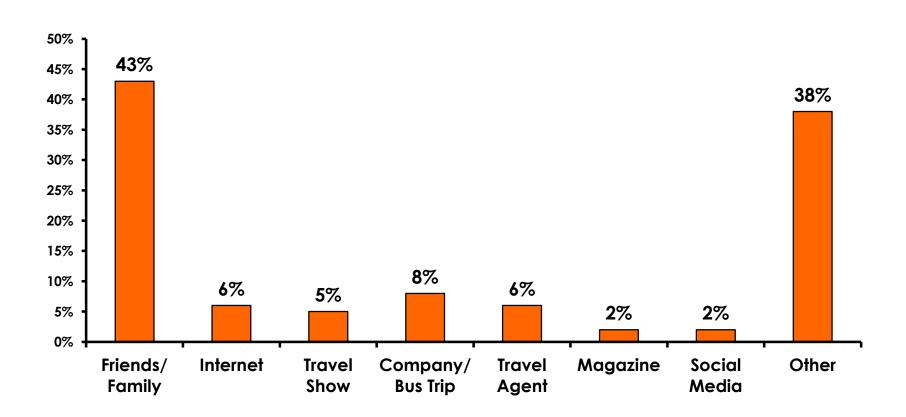


Internet- GVB Sources



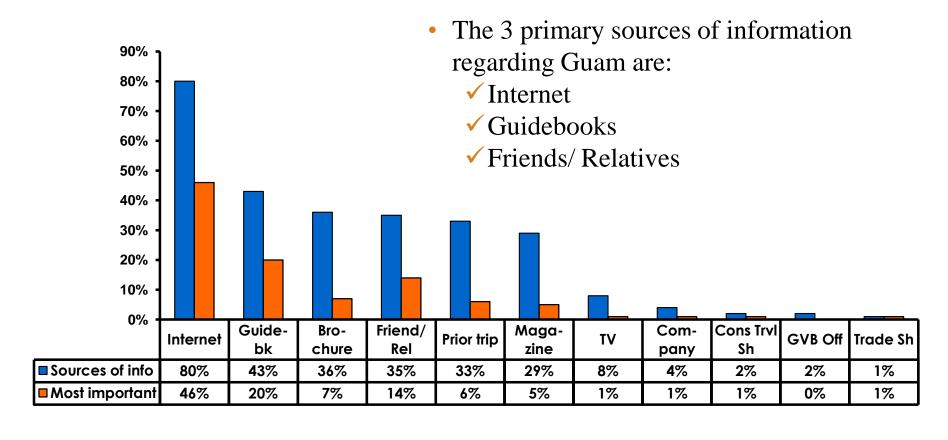


Travel Motivation-Info Sources



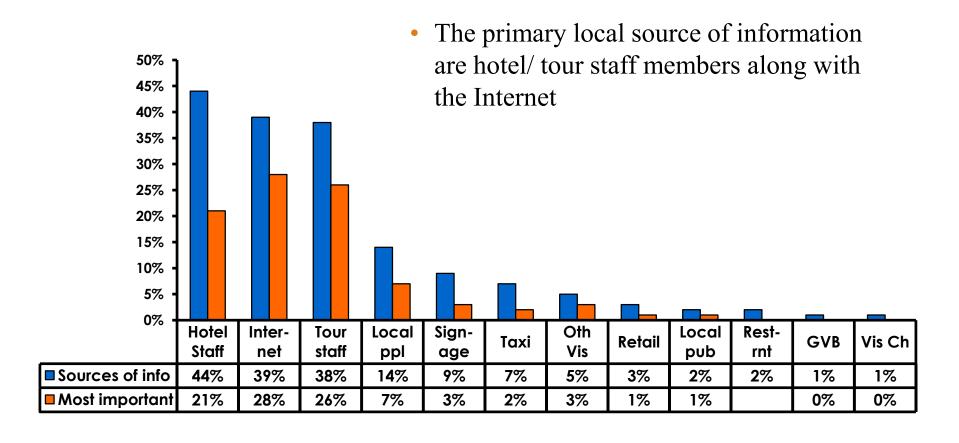


Sources of Information Pre-arrival





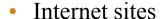
Sources of Information Post-arrival

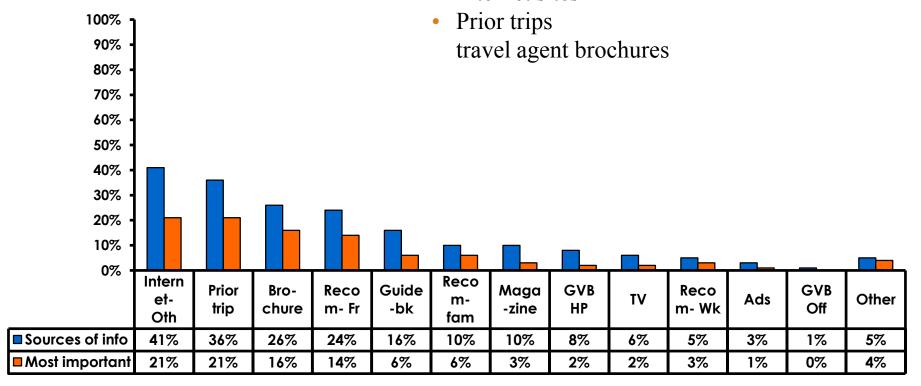




Sources of Information - Motivation

The primary motivational sources of information were.



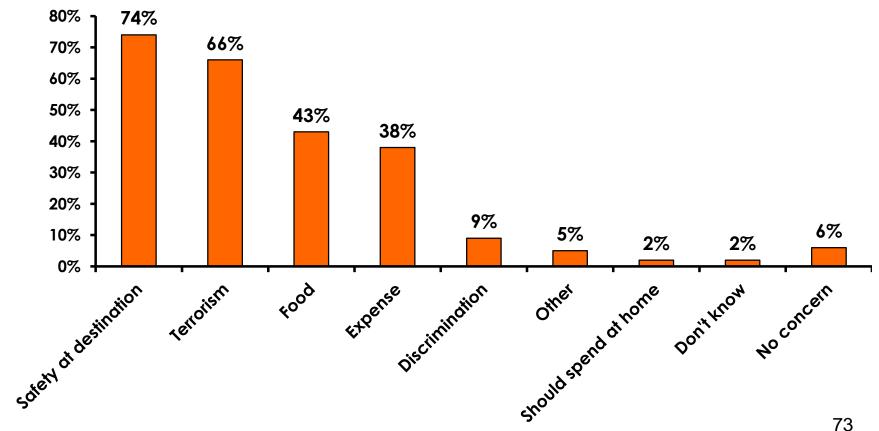




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



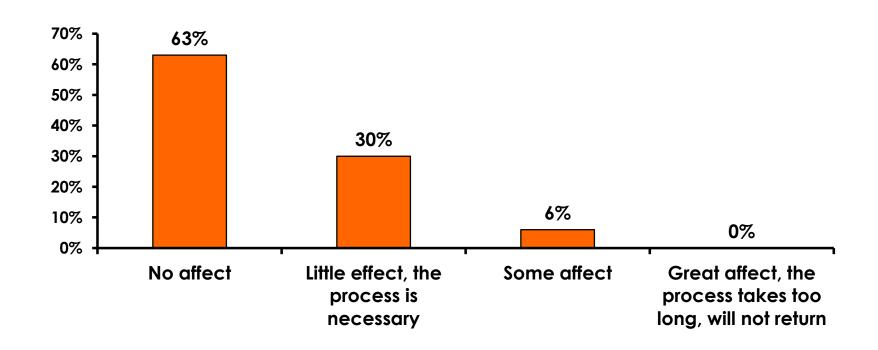


Concerns about travel outside of Japan - By Age & Income

		TOTAL		AC	Ε		Q26							
		-	18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q21	Safety	74%	77%	77%	68%	72%	76%	75%	80%	82%	70%	76%	69%	50%
	Terrorism	66%	57%	67%	64%	83%	53%	58%	70%	71%	67%	68%	59%	25%
	Food	43%	36%	42%	45%	47%	53%	38%	46%	53%	49%	41%	36%	25%
	Expense	38%	36%	37%	41%	36%	47%	45%	34%	38%	41%	34%	36%	
	Discrimination against Japanese	9%	6%	8%	17%		24%	13%	9%	7%	8%	5%	15%	
	No concerns	6%	4%	5%	10%	6%		10%	5%	7%	5%	2%	10%	50%
	Other	5%	3%	7%	5%		6%	5%	5%	9%	5%		3%	
	Should spend at home	2%	1%	5%		3%	6%	3%	4%	2%	2%	2%		
	Don't know	2%	1%	3%	2%						5%			
	Total Cou	nt 346	69	132	106	36	17	40	56	45	61	41	39	4



Security Screening/Immigration Process at Guam International Airport





Airport Screening

7pt Rating Scale

