



# GUAM VISITORS BUREAU

## Japan Visitor Tracker Exit Profile

### FY2014

### JANUARY 2014



**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 **350** 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 **350** 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.

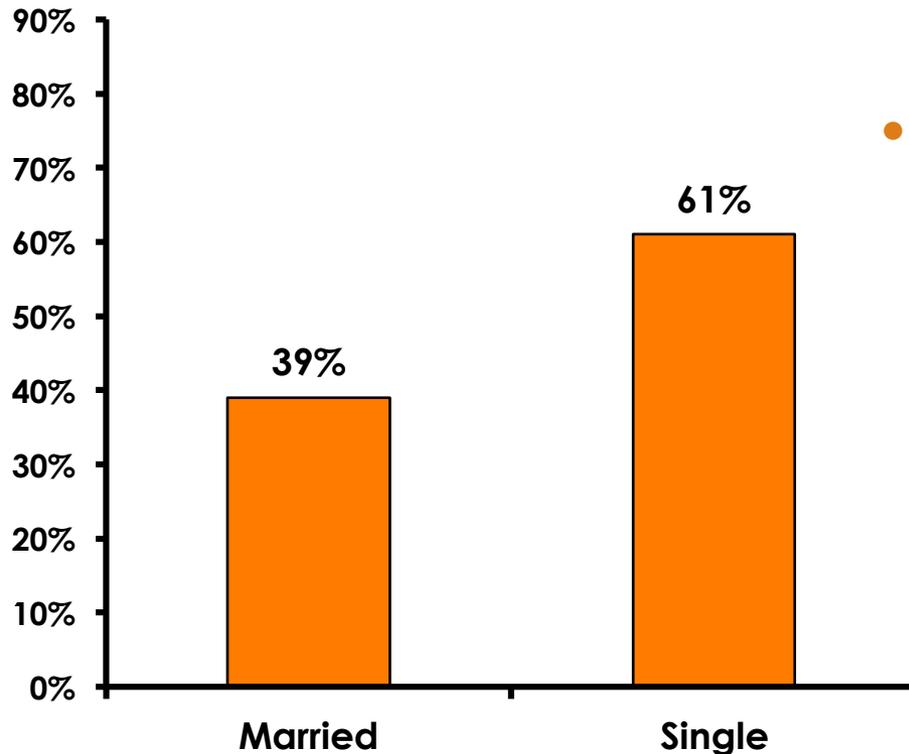
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# Objectives

- 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.

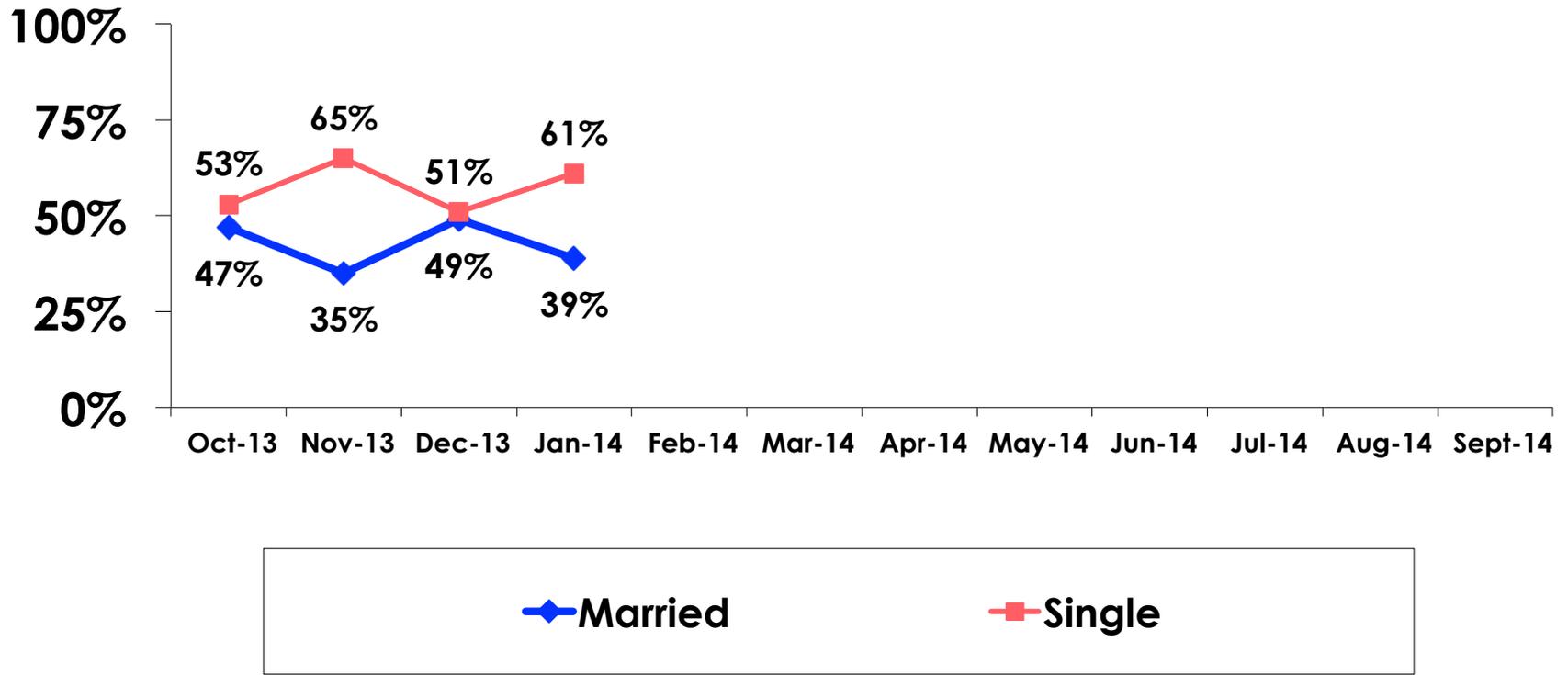
# SECTION 1 **PROFILE OF RESPONDENTS**

# Marital Status - Overall

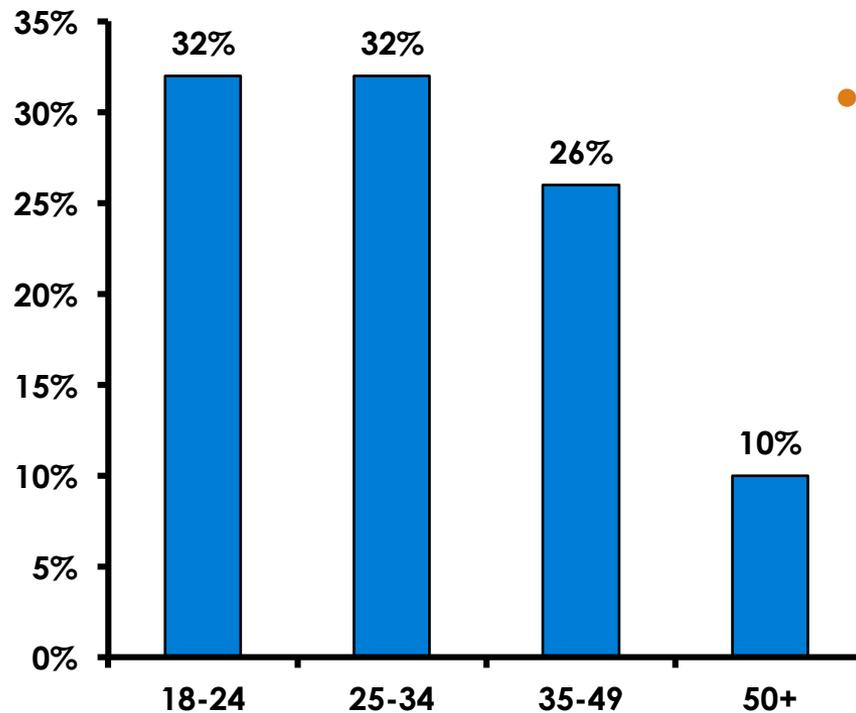


- Majority of first time visitors are single (71%).

# Marital Status

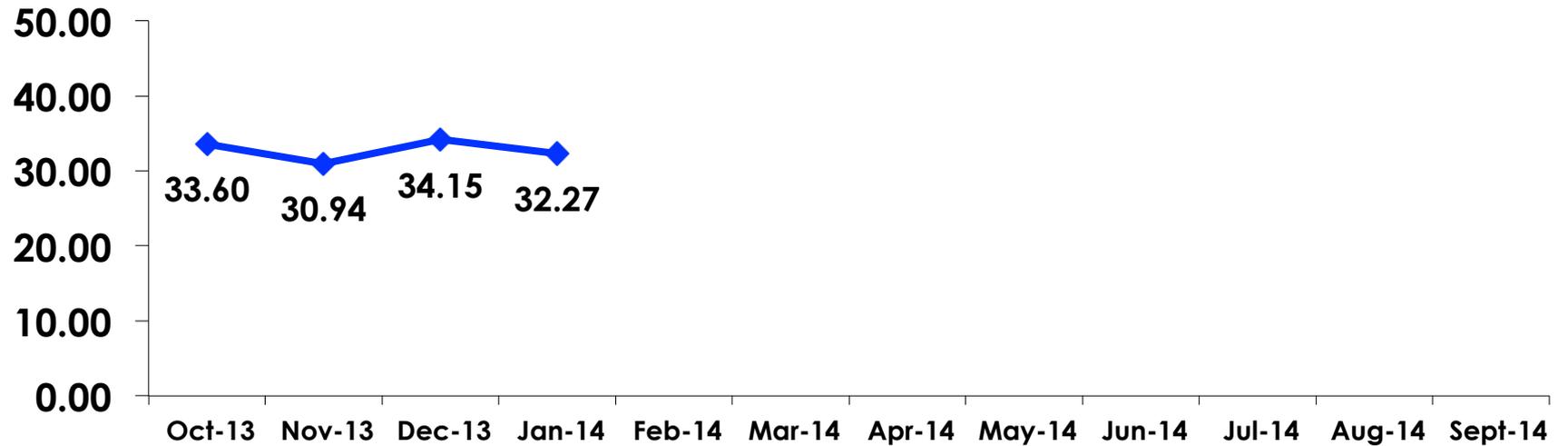


# Age - Overall

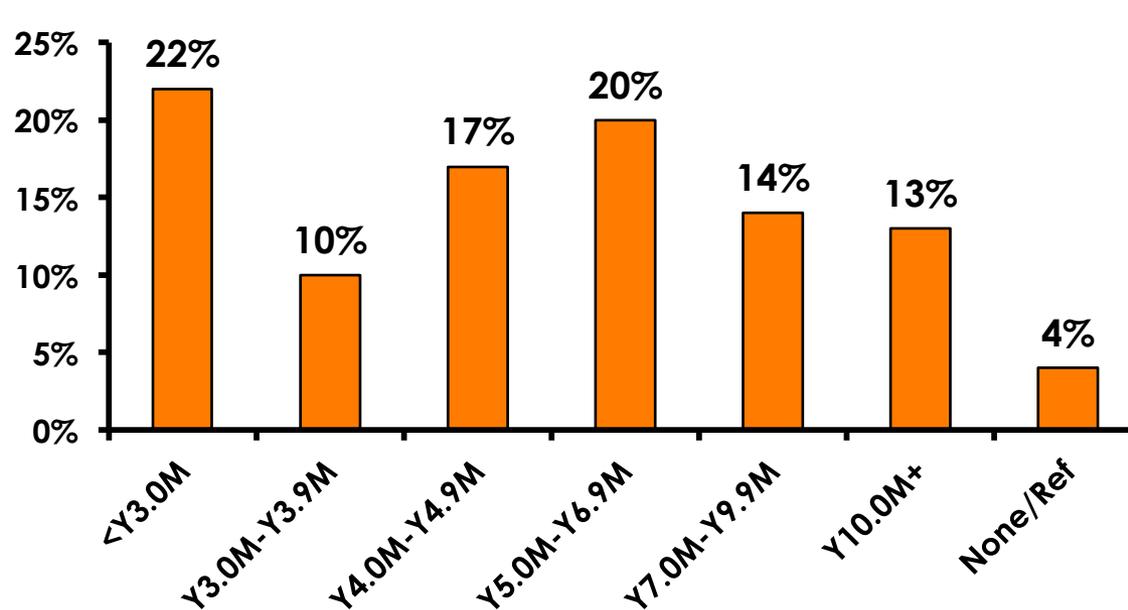


- The average age of the respondents is 32.27 years of age.

# Average Age

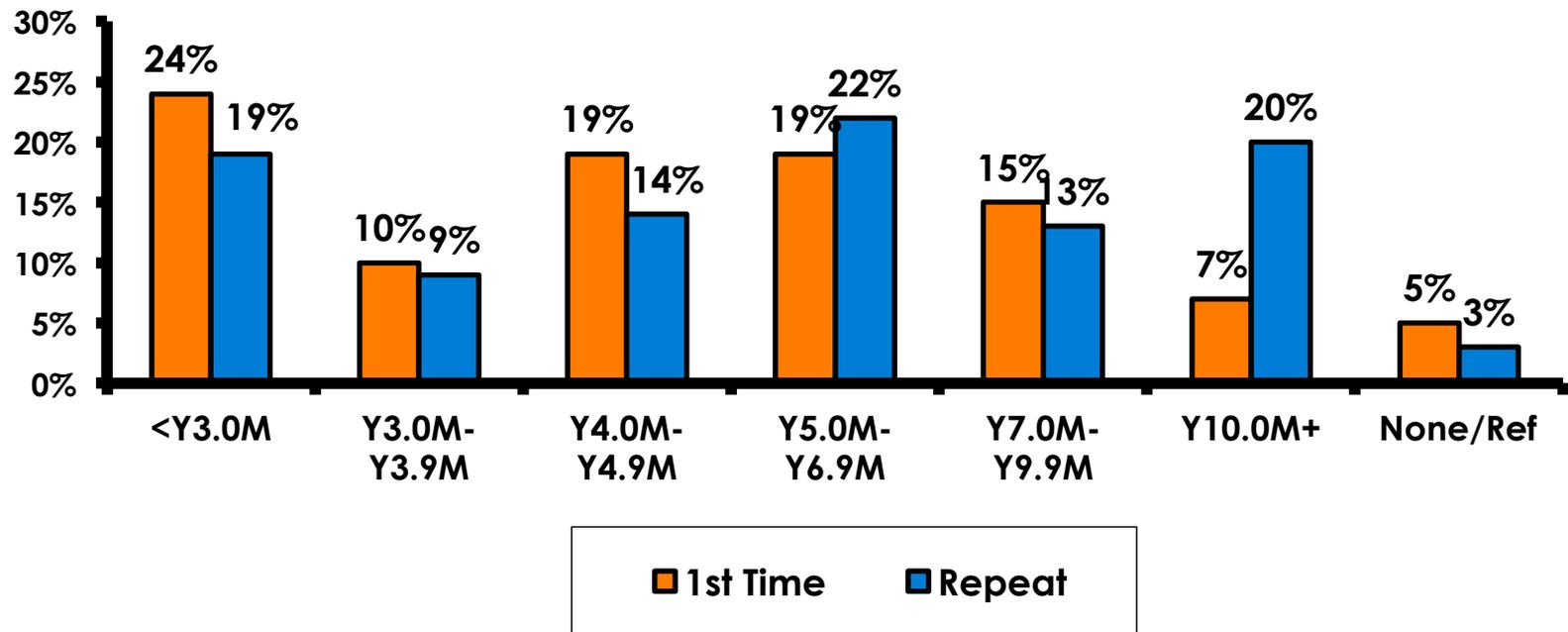


# Personal Income



• ¥103.77=\$1

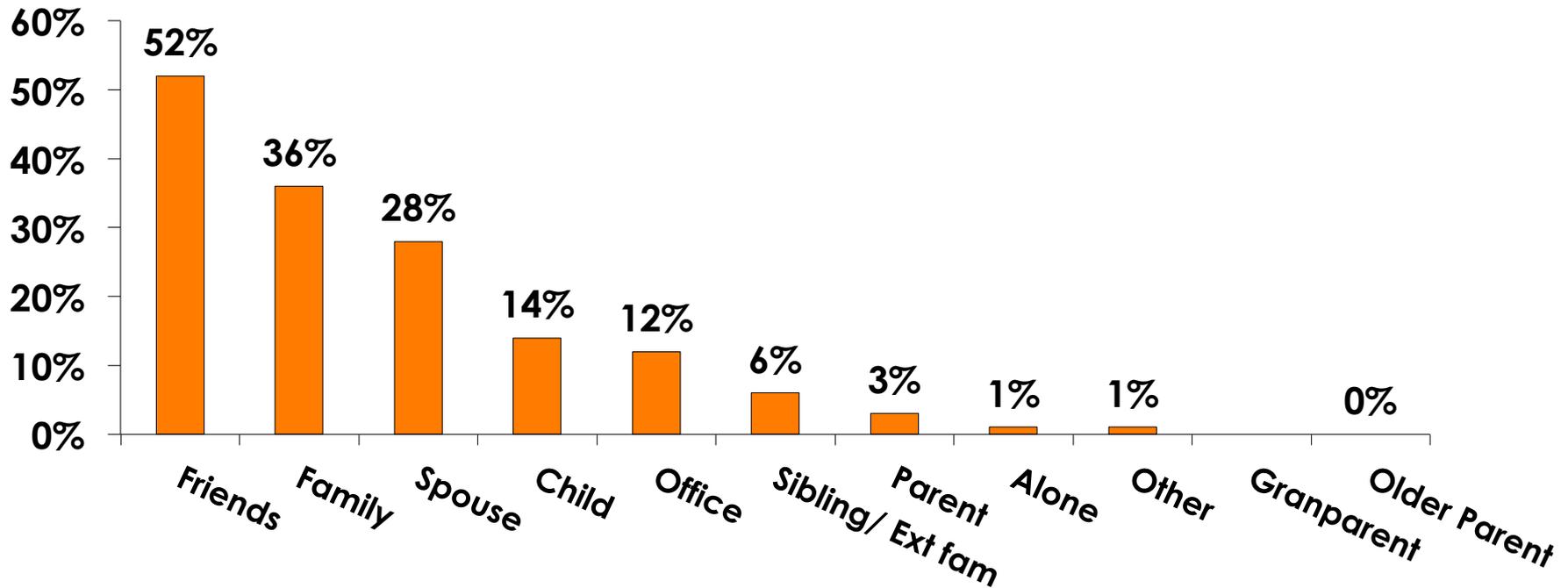
# Personal Income – 1st time vs. repeat



# Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	29	15	14	15	9	3	2
		Column N %	10%	9%	10%	17%	9%	4%	6%
	Y2.0M-Y3.0M	Count	36	14	22	19	12	4	1
		Column N %	12%	9%	15%	22%	12%	5%	3%
	Y3.0M-Y4.0M	Count	31	10	21	9	13	8	1
		Column N %	10%	6%	14%	10%	13%	10%	3%
	Y4.0M-Y5.0M	Count	52	25	27	10	23	15	3
		Column N %	17%	16%	18%	11%	23%	18%	10%
	Y5.0M-Y7.0M	Count	62	41	21	12	17	21	11
		Column N %	20%	26%	14%	14%	17%	25%	35%
	Y7.0M-Y10.0M	Count	43	26	17	7	13	17	6
		Column N %	14%	16%	12%	8%	13%	20%	19%
	Y10.0M+	Count	39	20	19	5	14	14	6
		Column N %	13%	13%	13%	6%	14%	17%	19%
	No Income	Count	13	8	5	11		1	1
		Column N %	4%	5%	3%	13%		1%	3%
	Total	Count	305	159	146	88	101	83	31

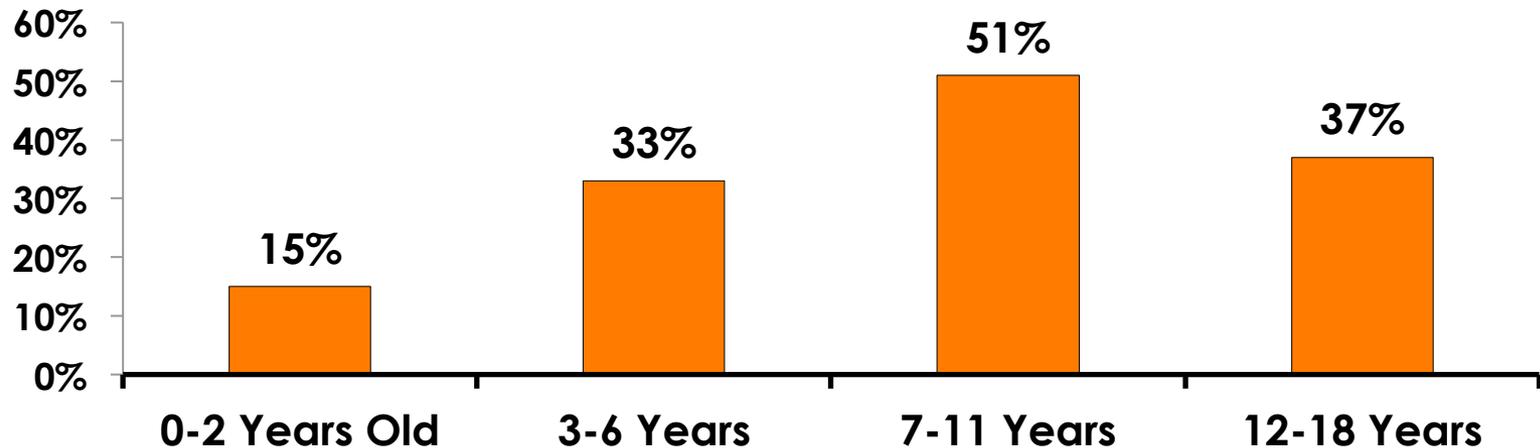
# Travel Companions



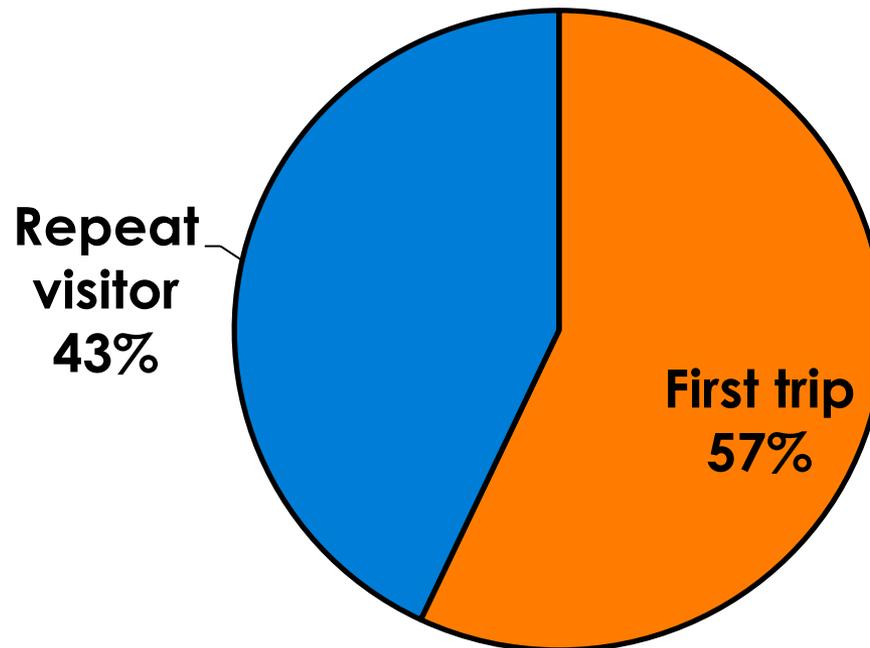
# Number of Children Travel Party

N=49 total respondents traveling with children.

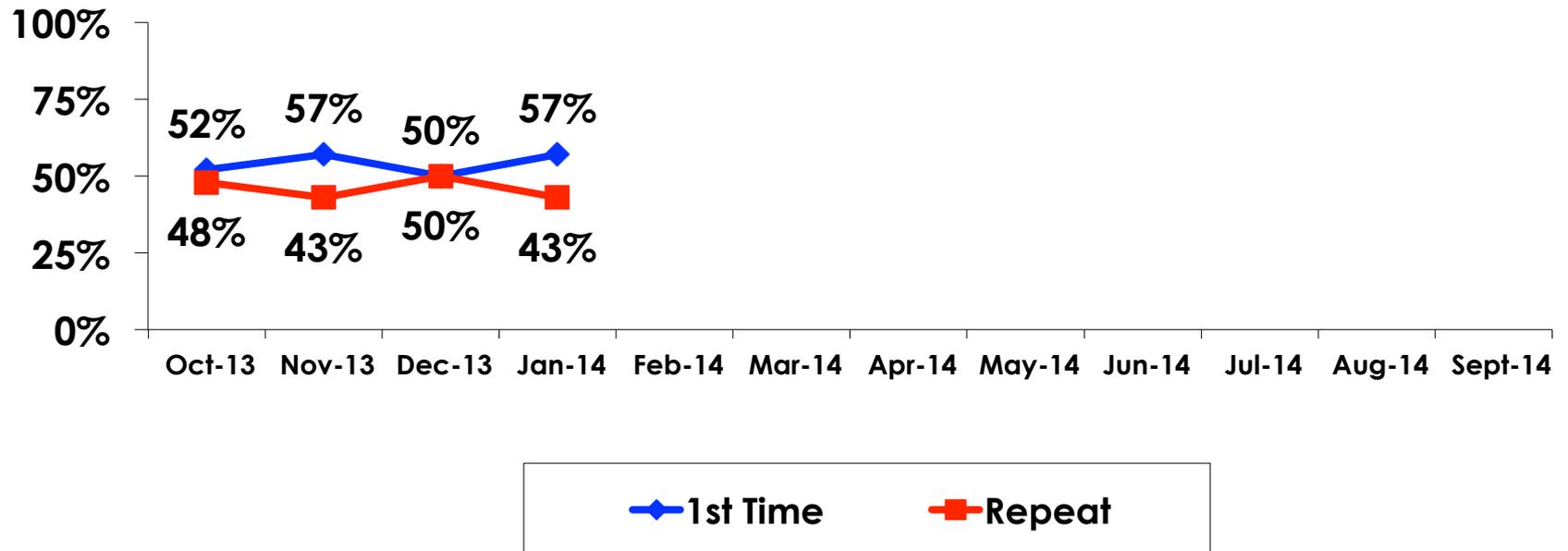
(Of those N=49 respondents, there is a total of 79 children 18 years or younger)



# Prior Trips to Guam



# Prior Trips to Guam



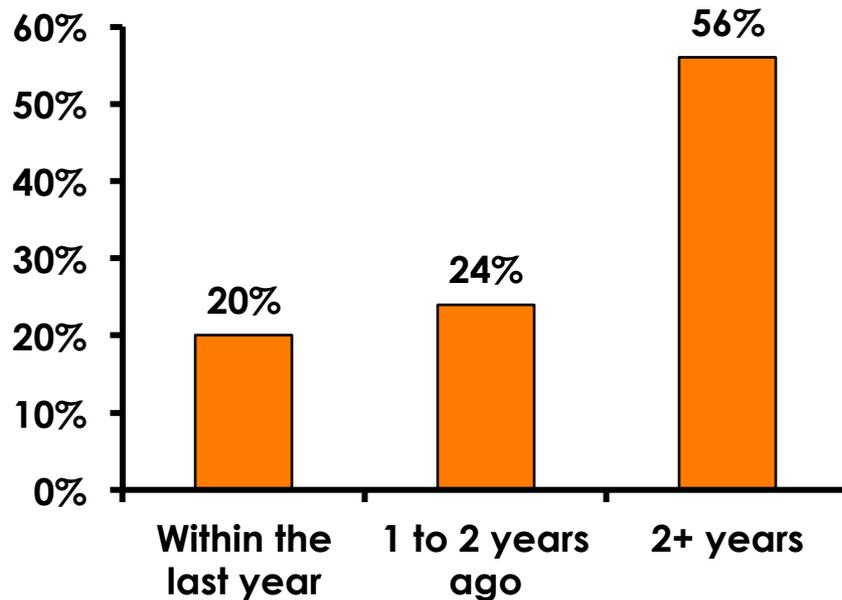
# Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	176	96	79
		Column N %	50%	49%	52%
	Female	Count	174	101	72
		Column N %	50%	51%	48%
	Total	Count	350	197	151
AGE	18-24	Count	112	90	22
		Column N %	32%	46%	15%
	25-34	Count	111	55	55
		Column N %	32%	28%	37%
	35-49	Count	91	39	51
		Column N %	26%	20%	34%
	50+	Count	34	12	22
		Column N %	10%	6%	15%
	Total	Count	348	196	150

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

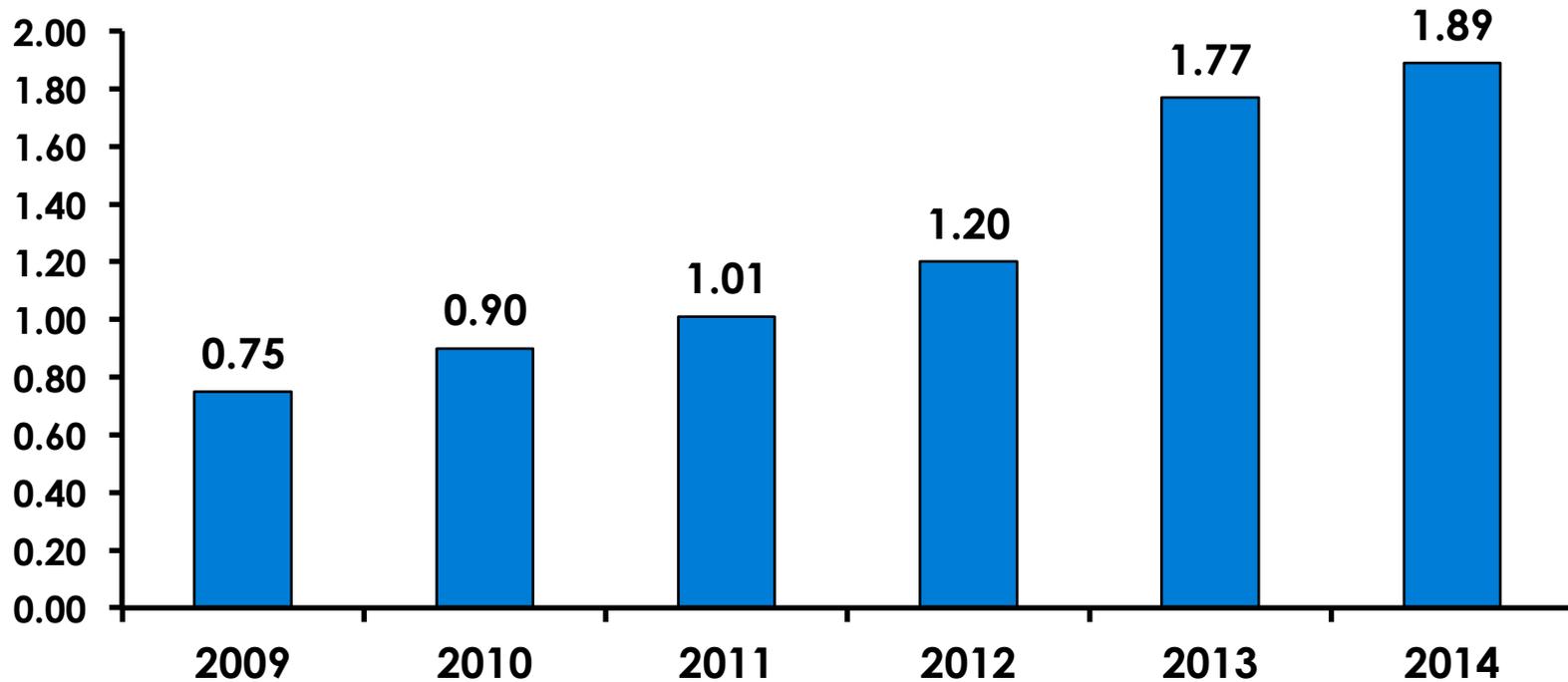
# Repeat Visitors Last Trip

n = 150



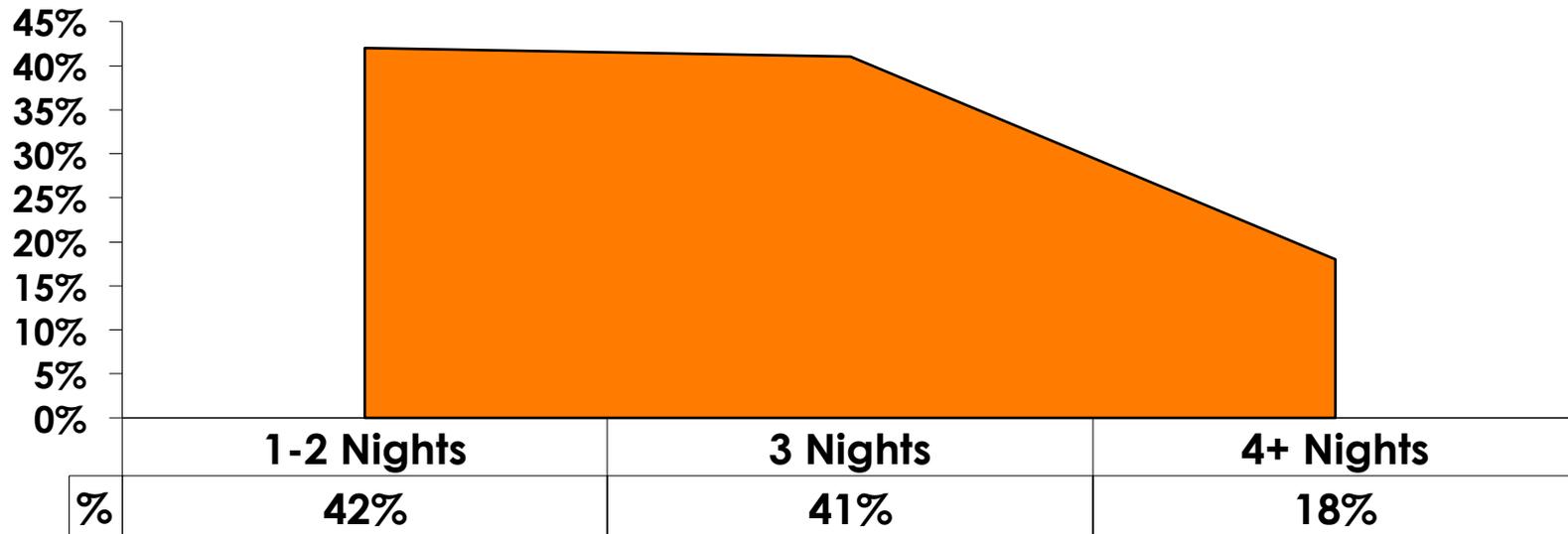
- The average repeat visitor has been to Guam 2.73 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

# Average Number Overnight Trips (2009-2014) (2 nights or more)

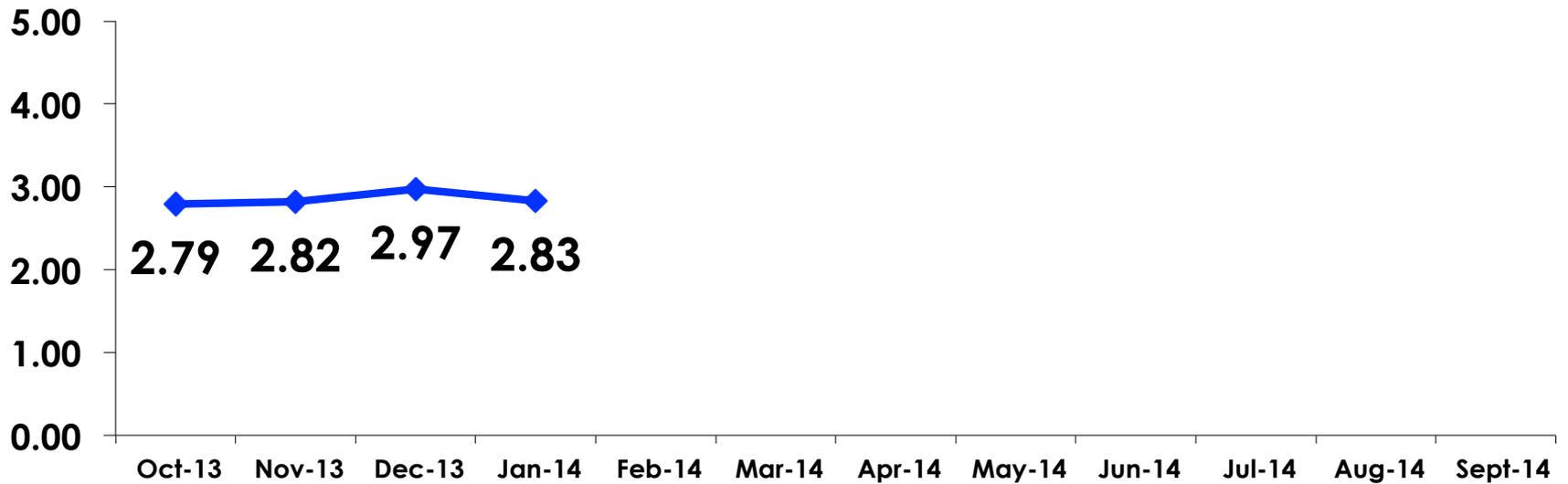


# Length of Stay

Mean = 2.83 Days  
Median = 3.0 Days



# Average Length of Stay

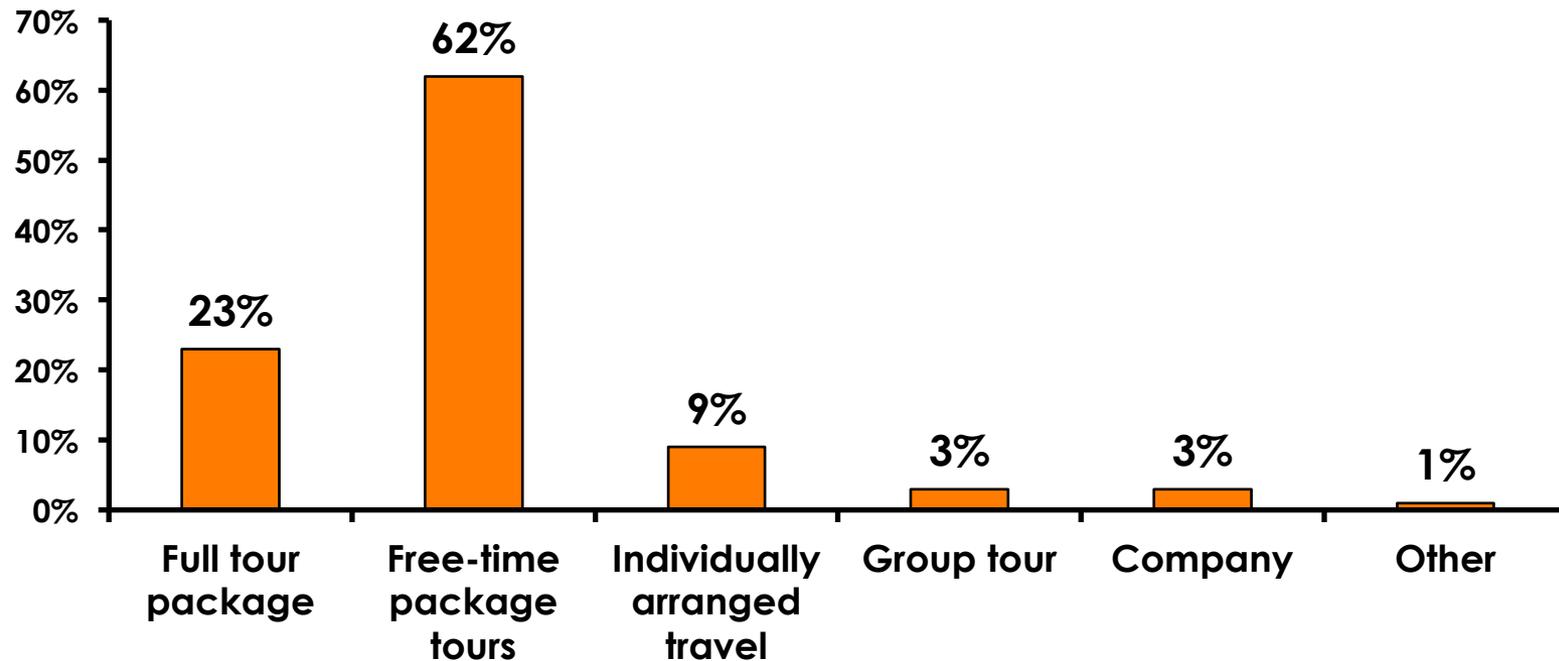


# Occupation by Income

		TOTAL	Q26							No Income	
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+		
Q25	Office worker non-mgr	20%	14%	36%	35%	12%	29%	16%	13%		
	Student	17%	38%	8%	6%	10%	6%	12%	13%	54%	
	Engineer	15%	7%	22%	3%	25%	18%	12%	13%		
	Salesperson	13%	3%	8%	19%	19%	13%	14%	15%	8%	
	Self-employed	9%	3%	8%	3%	8%	11%	14%	18%	23%	
	Professional/ Specialist	6%	7%		16%	6%	5%	2%	10%		
	Homemaker	4%	7%			2%	5%	7%		8%	
	Other	3%		3%	6%	8%	3%	2%	3%		
	Manager	3%			3%	2%	3%	9%	8%		
	Freeter	2%	14%	3%		2%		2%	3%		
	Skilled worker	2%			3%		3%	5%	5%		
	Unemployed	2%		3%	3%	2%	2%			8%	
	Teacher	1%	3%			4%					
	Govt- office worker non-mgr	1%		6%		2%					
	Executive (30+ employees)	1%	3%	3%				2%			
	Govt- Manager	1%					2%				
	Free-lancer	0%						2%			
	Total	Count	342	29	36	31	52	62	43	39	13

# SECTION 2 **TRAVEL PLANNING**

# Travel Planning - Overall

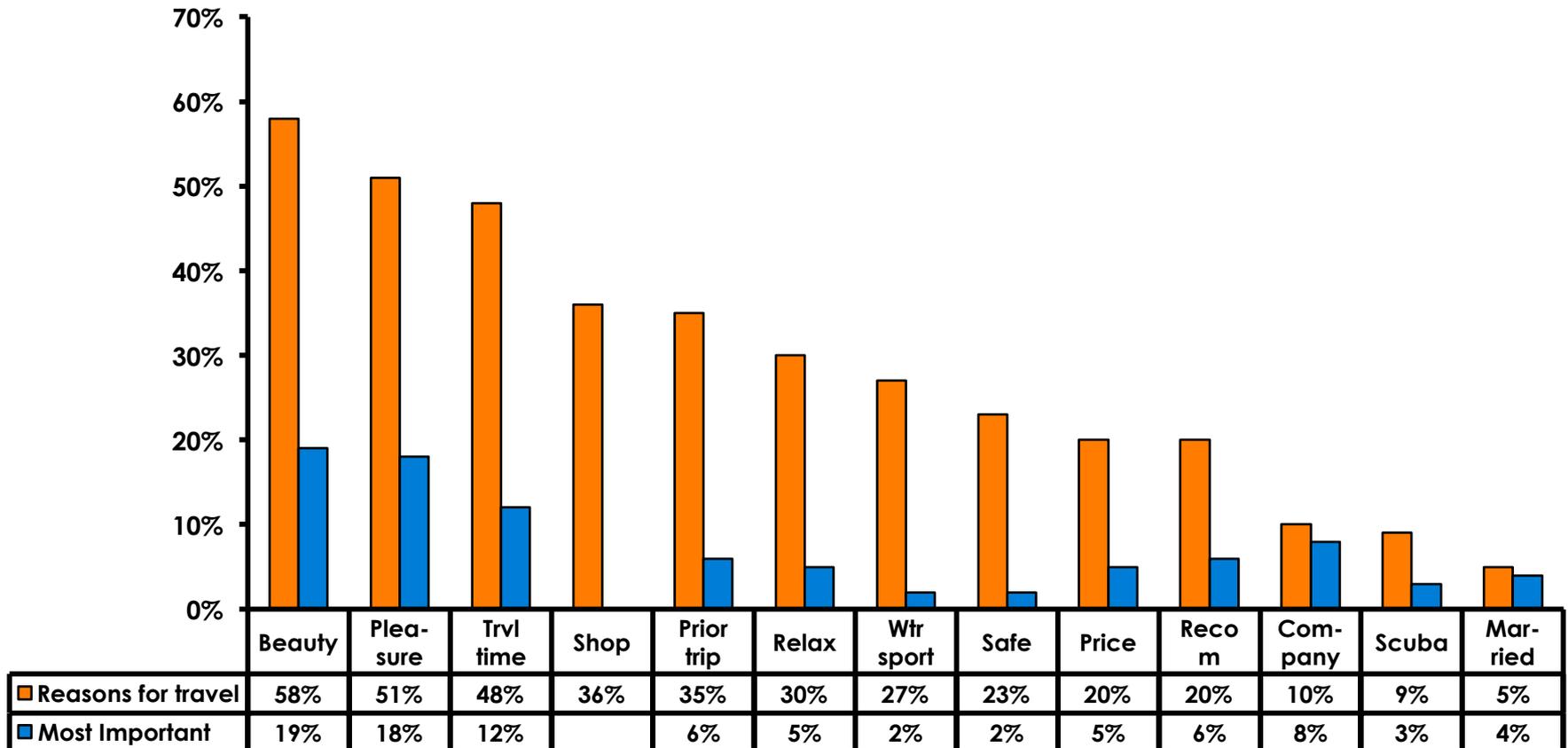


# Accommodation by Income

Average length of stay: 2.83 days

	TOTAL	Q26								
		-	<Y2.0 million	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	23%	31%	22%	19%	21%	26%	23%	13%	31%	
Pacific Bay Hotel	13%	14%	17%	3%	15%	13%	5%	10%	23%	
PIC Club	9%	10%	8%	10%	4%	10%	12%	13%	23%	
Outrigger Guam Resort	7%	7%	11%	6%	8%	11%	5%	10%	8%	
Guam Reef & Olive Spa	7%	3%		6%	12%	5%	7%	13%		
Fiesta Resort Guam	5%	3%	3%	6%	2%	8%	2%	13%		
Hotel Nikko Guam	5%	3%		3%	10%	5%	12%	3%		
Grand Plaza Hotel	4%	7%	11%	3%	6%	2%	5%	3%		
Holiday Resort Guam	3%	7%	6%	6%	2%		5%			
Westin Resort Guam	3%	3%	8%	3%	4%	2%	5%	3%		
Onward Beach Resort	3%		3%	6%	2%	2%	7%	3%		
Hilton Guam Resort	3%	3%	3%	3%		2%	5%			
Royal Orchid Guam	3%		3%	10%	2%	2%	2%	3%		
Guam Marriott Resort	3%			6%	4%	2%	2%	3%		
Oceanview Hotel	2%	3%			4%	2%	2%		8%	
Bayview Hotel	2%		6%		2%	2%		5%		
Hyatt Regency Guam	1%			3%		3%		5%		
Other	1%				4%					
Hotel Santa Fe	1%	3%				3%				
Condo	1%							3%	8%	
Sheraton Laguna Guam	1%			3%						
Leo Palace Resort	1%					2%	2%			
Total	Count	349	29	36	31	52	61	43	39	13

# Travel Motivation - Top Responses



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# Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Short travel time

are the primary reasons for visiting during this period.

# Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	58%	55%	61%	57%	65%	52%	65%	
	Pleasure	51%	55%	56%	39%	53%	44%	58%	
	Short travel time	48%	41%	50%	50%	62%	49%	48%	
	Shopping	36%	33%	41%	29%	41%	22%	50%	
	Previous trip	35%	14%	40%	49%	56%	38%	33%	
	Relax	30%	23%	33%	32%	41%	31%	30%	
	Water sports	27%	40%	25%	18%	15%	22%	32%	
	Safe	23%	20%	23%	20%	47%	25%	22%	
	Price	20%	25%	15%	21%	15%	16%	24%	
	Recomm- friend/family/trvl agnt	20%	32%	16%	11%	15%	18%	21%	
	Company/ Business Trip	10%	15%	5%	13%	3%	9%	11%	
	Scuba	9%	11%	11%	6%	6%	10%	8%	
	Other	5%	10%	2%	6%		5%	5%	
	Married/ Attn wedding	5%	1%	9%	6%		5%	5%	
	Golf	4%	2%		6%	24%	7%	1%	
	Honeymoon	2%	2%	2%	2%	6%	3%	1%	
	Visit friends/ Relatives	2%	4%	1%	3%		1%	4%	
	Organized sports	2%	1%	4%	2%		2%	2%	
	Company Sponsored	0%		1%				1%	
	Total	Count	348	111	111	90	34	176	172

# Motivation by Income

		TOTAL	Q26								
		-	<Y2.0 million	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	58%	55%	53%	53%	56%	66%	60%	62%	38%	
	Pleasure	51%	55%	58%	57%	46%	53%	36%	44%	38%	
	Short travel time	48%	38%	42%	63%	40%	56%	52%	46%	54%	
	Shopping	36%	34%	33%	37%	35%	35%	36%	36%	38%	
	Previous trip	35%	24%	36%	37%	25%	39%	36%	67%	31%	
	Relax	30%	17%	36%	30%	21%	34%	36%	44%	23%	
	Water sports	27%	31%	22%	30%	31%	21%	24%	28%	31%	
	Safe	23%	17%	14%	30%	23%	27%	31%	21%	15%	
	Price	20%	14%	25%	17%	17%	26%	21%	15%	31%	
	Recomm- friend/family/trvl agnt	20%	28%	25%	17%	21%	15%	14%	15%	23%	
	Company/ Business Trip	10%	10%	22%	7%	13%	10%	7%	3%		
	Scuba	9%	7%	6%	17%	8%	6%	14%	10%	8%	
	Other	5%		6%		10%		7%	5%	8%	
	Married/ Attn wedding	5%		3%	7%	6%	5%	5%	10%		
	Golf	4%	3%			6%	8%	5%	5%	8%	
	Honeymoon	2%	3%		3%	2%	5%	2%			
	Visit friends/ Relatives	2%		8%	7%	2%	2%		3%		
	Organized sports	2%				6%	2%		3%		
	Company Sponsored	0%					2%				
	Total	Count	348	29	36	30	52	62	42	39	13

# SECTION 3 **EXPENDITURES**

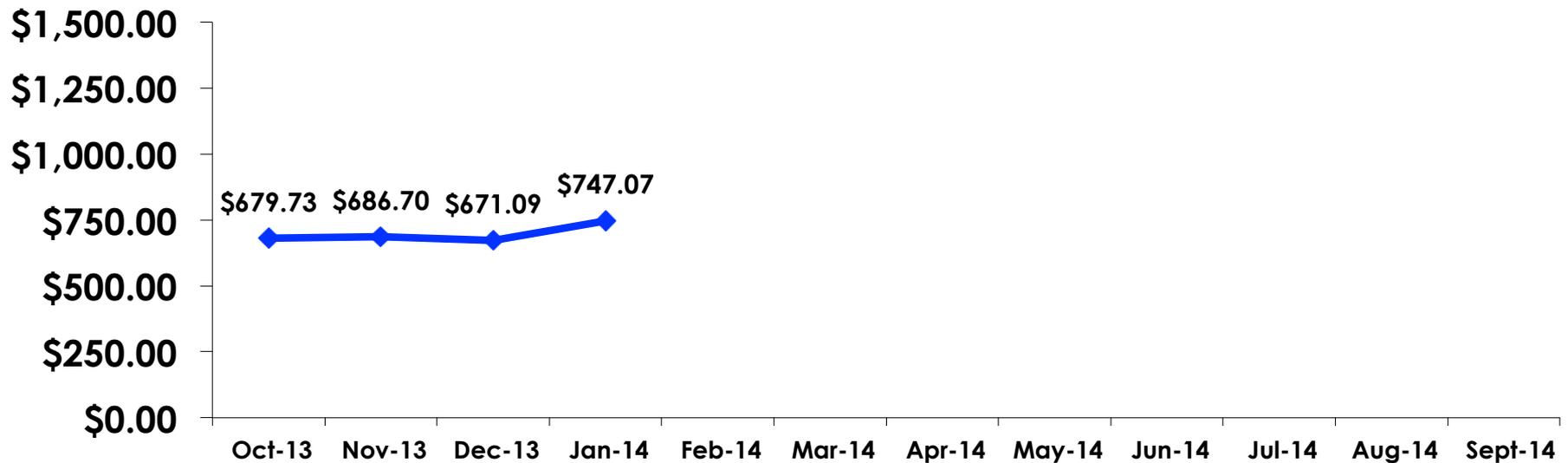
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# Prepaid Expenditures

¥103.77/US\$1

- \$1,396.55 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$24,092 = maximum (highest amount recorded for the entire sample)
- \$747.07 = overall mean average per person prepaid expenditures

# Prepaid Expenditures Per Person



YTD=\$696.14

# Breakdown of Prepaid Expenditures

¥103.77=\$1

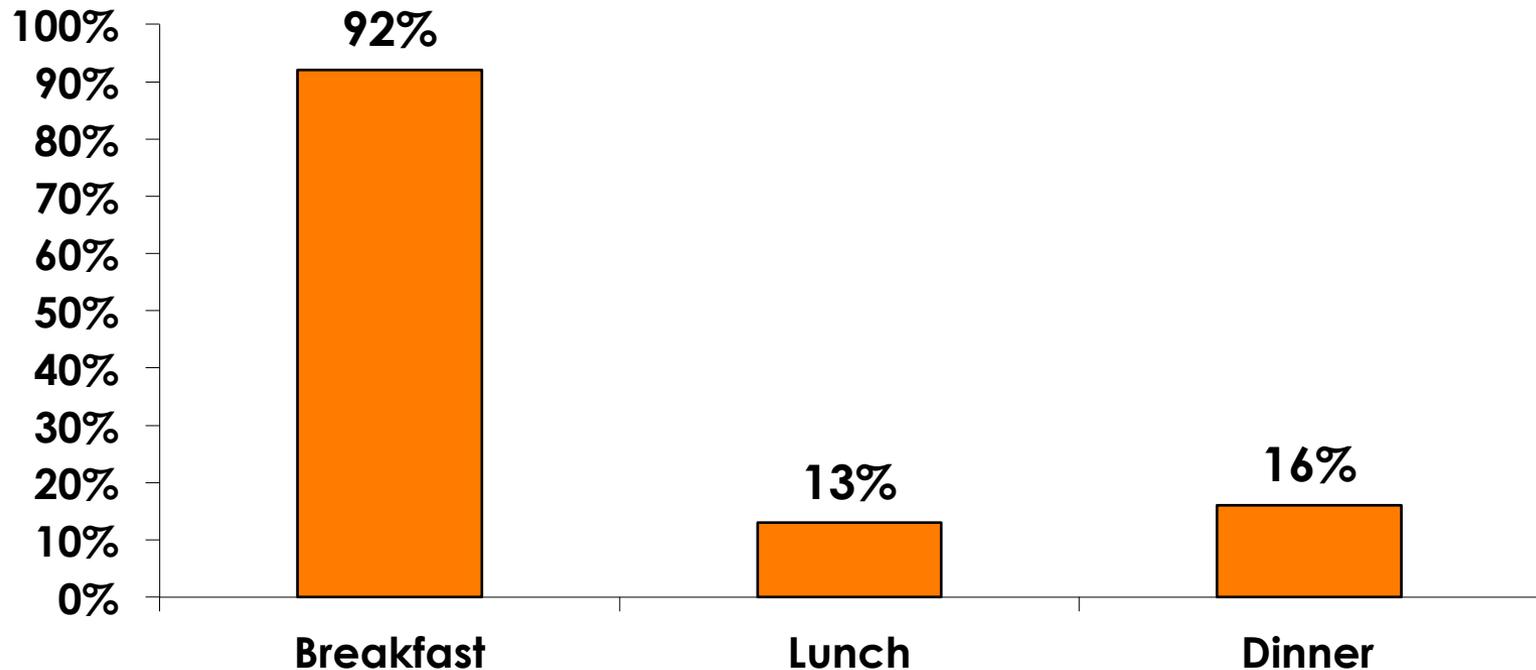
(Filter: Only those who responded/  
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,217.81
Air & Accommodation w/ daily meal package	\$3,139.91
Air only	\$1,000.29
Accommodation only	\$523.89
Accommodation w/ daily meal only	\$438.47
Food & Beverages in Hotel	\$167.95
Ground transportation – Japan	\$107.43
Ground transportation – Guam	\$165.43
Optional tours/ activities	\$387.80
Other expenses	\$351.14
<b>Total Prepaid</b>	<b>\$1,396.55</b>

# Prepaid Meal Breakdown

## Air/ Accommodations with Daily Meal Package

n=38

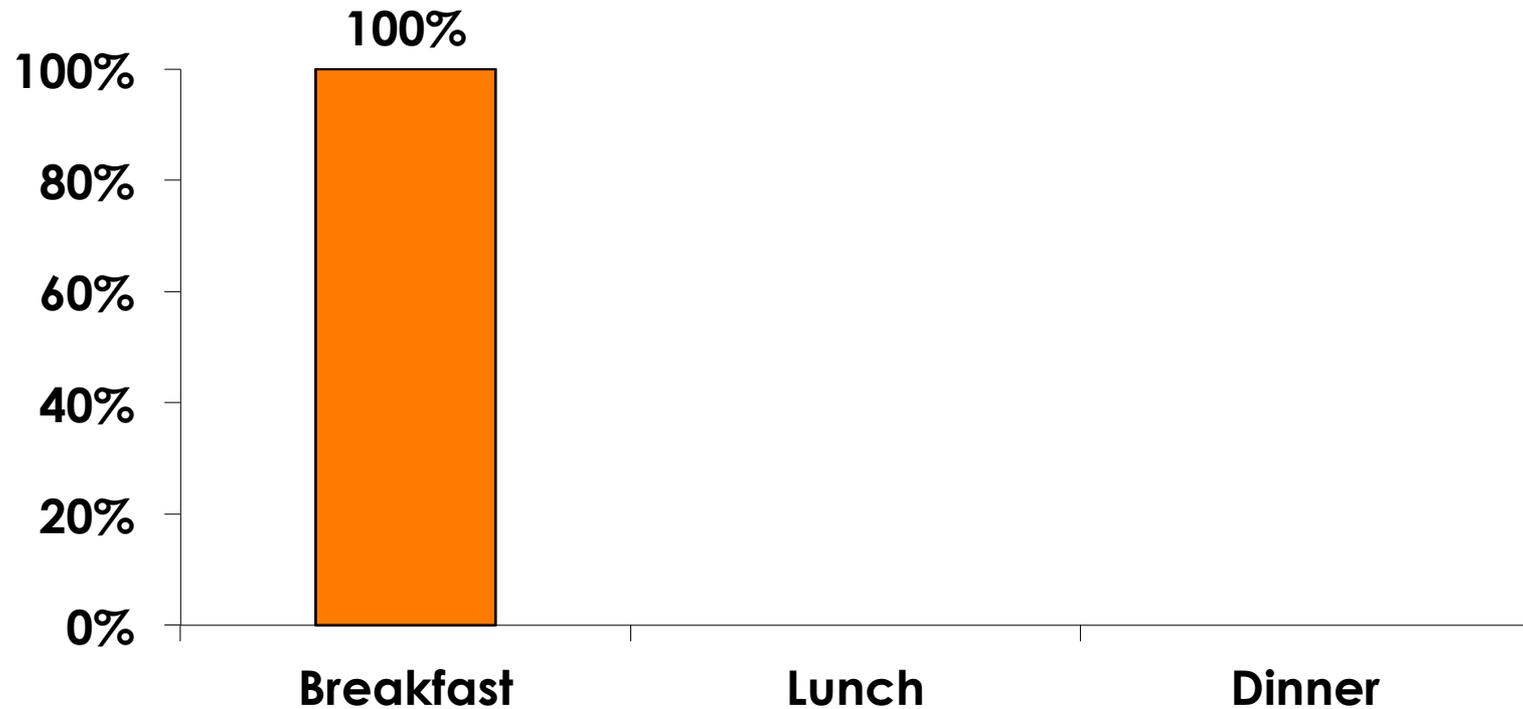


Mean=\$3,139.91 per travel party

# Prepaid Meal Breakdown

Accommodations with Daily Meal Package

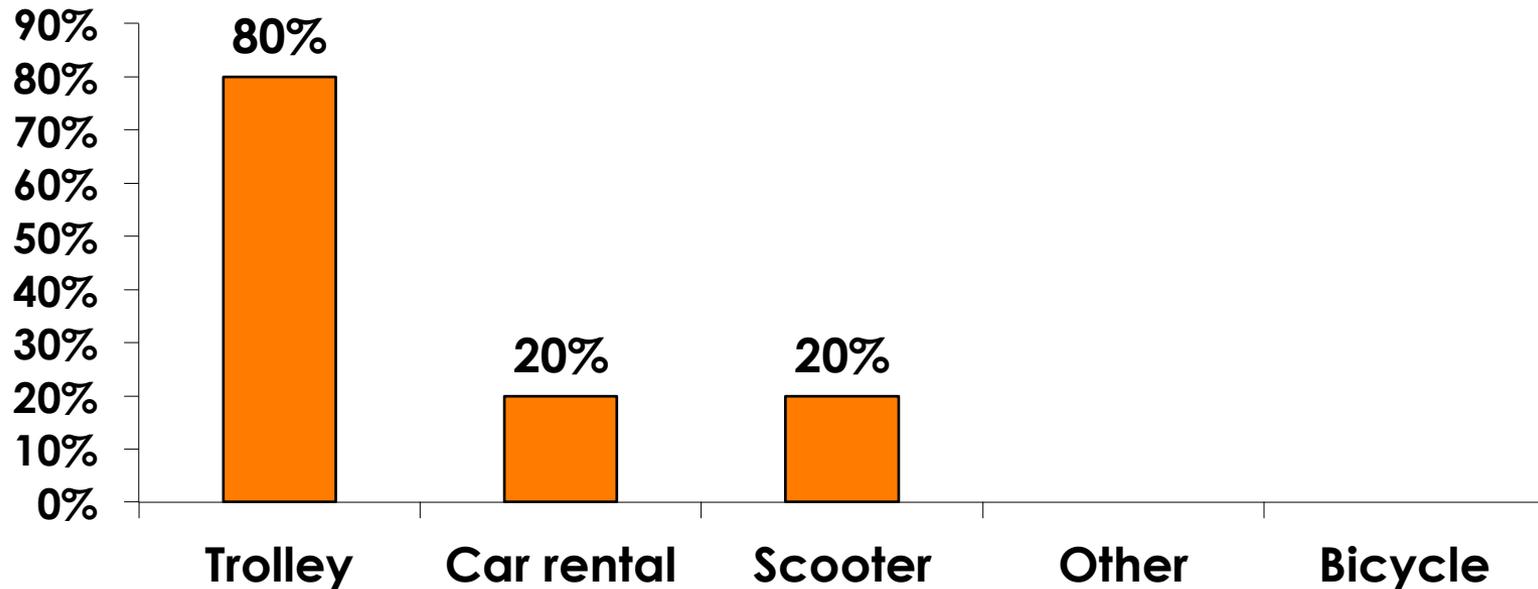
N=1



Mean=\$438.47 per travel party

# Prepaid Ground Transportation

n=5

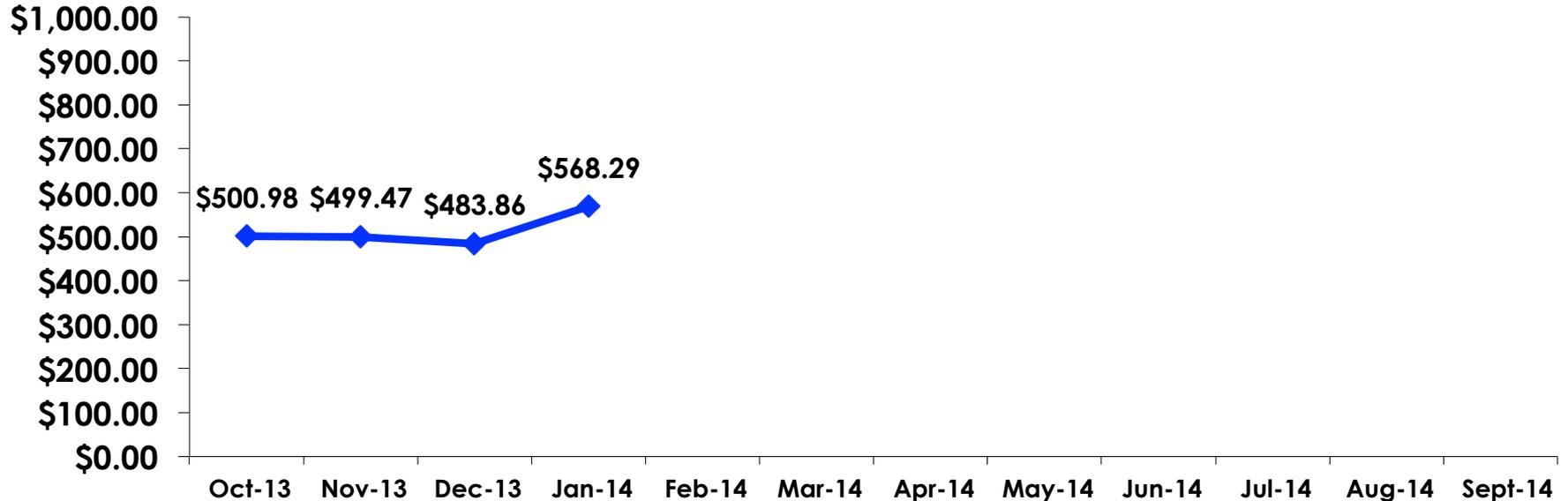


Mean=\$165.43 per travel party

# On-Island Expenditures

- \$836.37 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,800 = Maximum (highest amount recorded for the entire sample)
- \$568.29 = overall mean average per person on-island expenditure

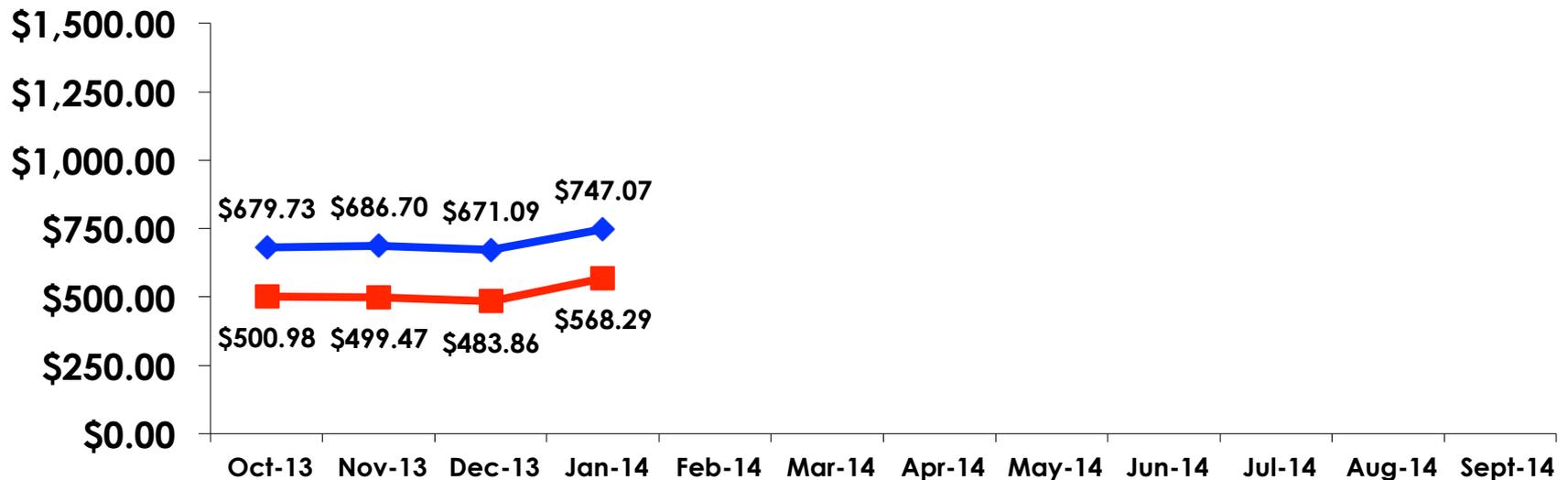
# On-Island Expenditures Per Person



YTD = \$513.14

# Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$696.14    On-Island YTD = \$513.14



# Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
			-	Male	Female	Male				Female		
		AGE				AGE						
		18-24				25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$568.29	\$505.82	\$631.48	\$431.60	\$517.88	\$491.41	\$708.75	\$490.98	\$770.69	\$619.32	\$500.45
	Median	\$402	\$388	\$450	\$385	\$320	\$310	\$600	\$400	\$500	\$505	\$500
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$131	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$3,933	\$5,000	\$1,500	\$3,000	\$3,933	\$2,500	\$2,301	\$5,000	\$3,122	\$1,050

# On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$31.43	\$38.82	\$23.96	\$16.57	\$43.33	\$35.40	\$32.79
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$36.42	\$44.89	\$27.86	\$28.07	\$24.14	\$58.85	\$46.18
	Median	\$10	\$20	\$0	\$10	\$0	\$20	\$20
F&B RESTRNT	Mean	\$86.32	\$116.39	\$55.90	\$42.82	\$69.96	\$118.57	\$192.91
	Median	\$10	\$50	\$0	\$3	\$0	\$50	\$100
OPT TOUR	Mean	\$75.26	\$91.66	\$58.67	\$61.20	\$72.57	\$107.15	\$45.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$326.26	\$263.05	\$390.20	\$278.55	\$289.75	\$433.09	\$321.18
	Median	\$50	\$45	\$100	\$20	\$50	\$100	\$65
GIFT- OTHER	Mean	\$122.42	\$132.69	\$112.03	\$86.98	\$91.25	\$180.33	\$178.41
	Median	\$70	\$75	\$60	\$48	\$70	\$100	\$100
TRANS	Mean	\$13.50	\$18.63	\$8.32	\$5.46	\$8.82	\$24.56	\$26.47
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$190.41	\$229.94	\$150.43	\$147.25	\$202.11	\$157.29	\$394.26
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$836.37	\$936.11	\$735.49	\$522.27	\$800.67	\$1,115.69	\$1,246.62
	Median	\$546	\$600	\$500	\$400	\$500	\$800	\$773

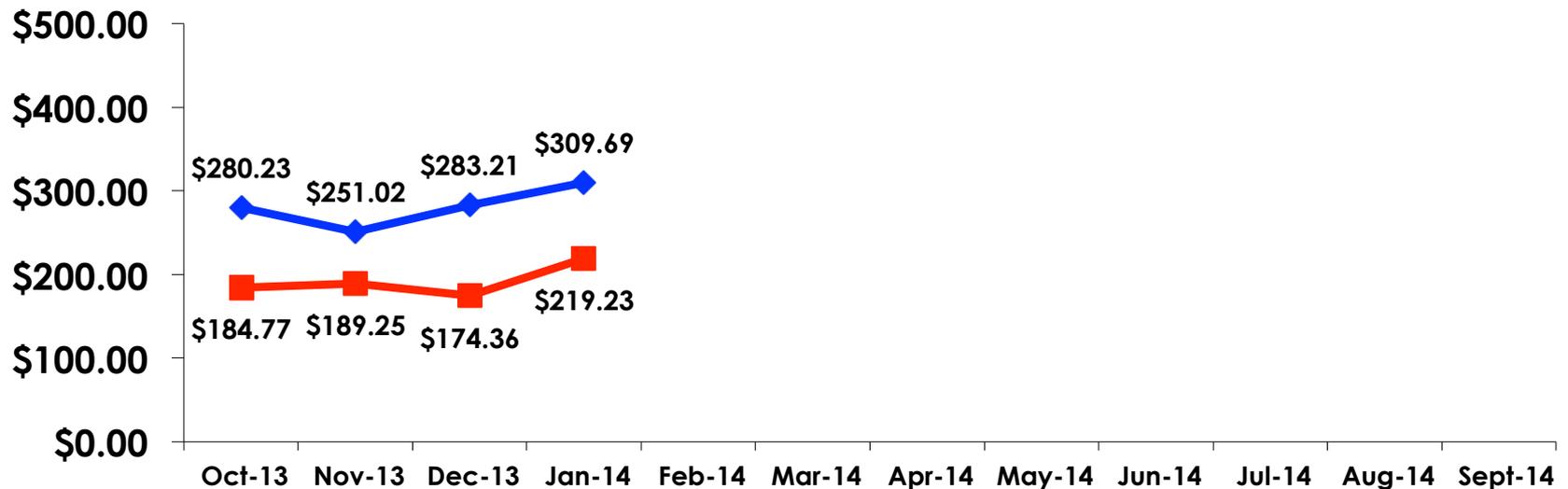
# On-Island Expenditures

## First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$31.43	\$25.90	\$38.68
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$36.42	\$31.79	\$42.22
	Median	\$10	\$5	\$10
F&B RESTRNT	Mean	\$86.32	\$66.79	\$111.94
	Median	\$10	\$0	\$50
OPT TOUR	Mean	\$75.26	\$57.68	\$98.45
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$326.26	\$201.43	\$485.23
	Median	\$50	\$30	\$100
GIFT- OTHER	Mean	\$122.42	\$115.32	\$132.54
	Median	\$70	\$50	\$100
TRANS	Mean	\$13.50	\$8.78	\$19.81
	Median	\$0	\$0	\$0
OTHER	Mean	\$190.41	\$199.11	\$181.19
	Median	\$0	\$0	\$0
TOTAL	Mean	\$836.37	\$707.36	\$1,003.52
	Median	\$546	\$500	\$700

# On-Island Expenditures Per Day

Travel Party YTD = \$281.00    Per Person YTD = \$191.87

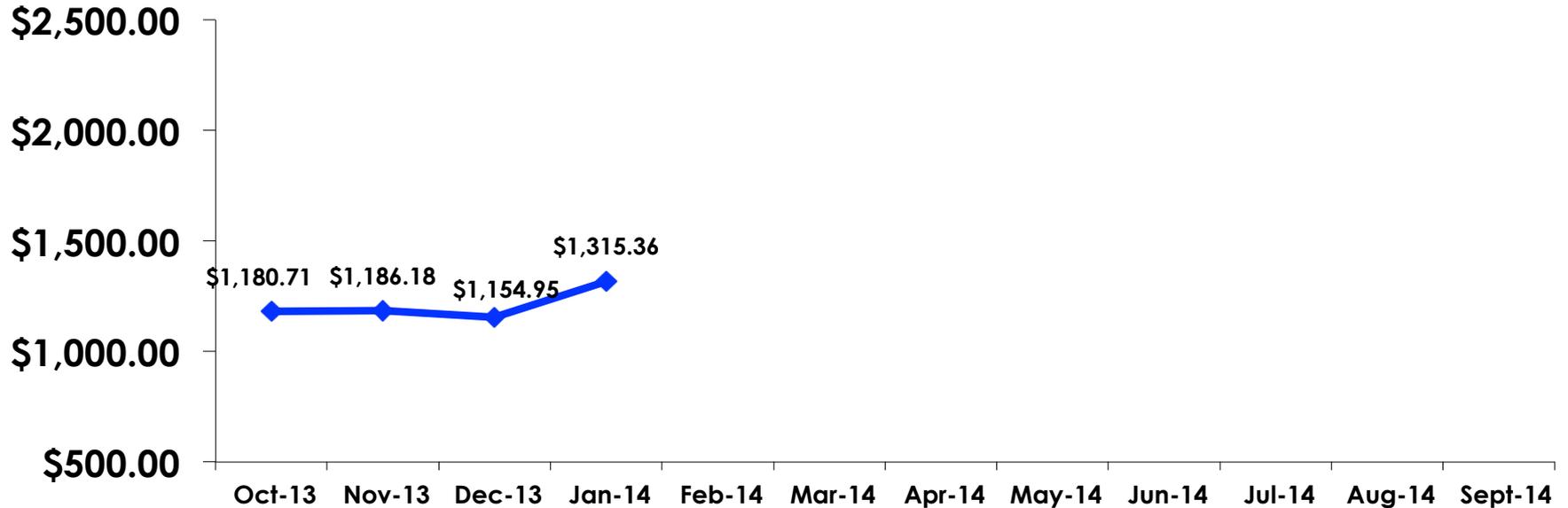


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# Total Expenditures Per Person (Prepaid & On-Island)

- \$1,315.36 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,442 = Maximum (highest amount recorded for the entire sample)

# Total Expenditures Per Person



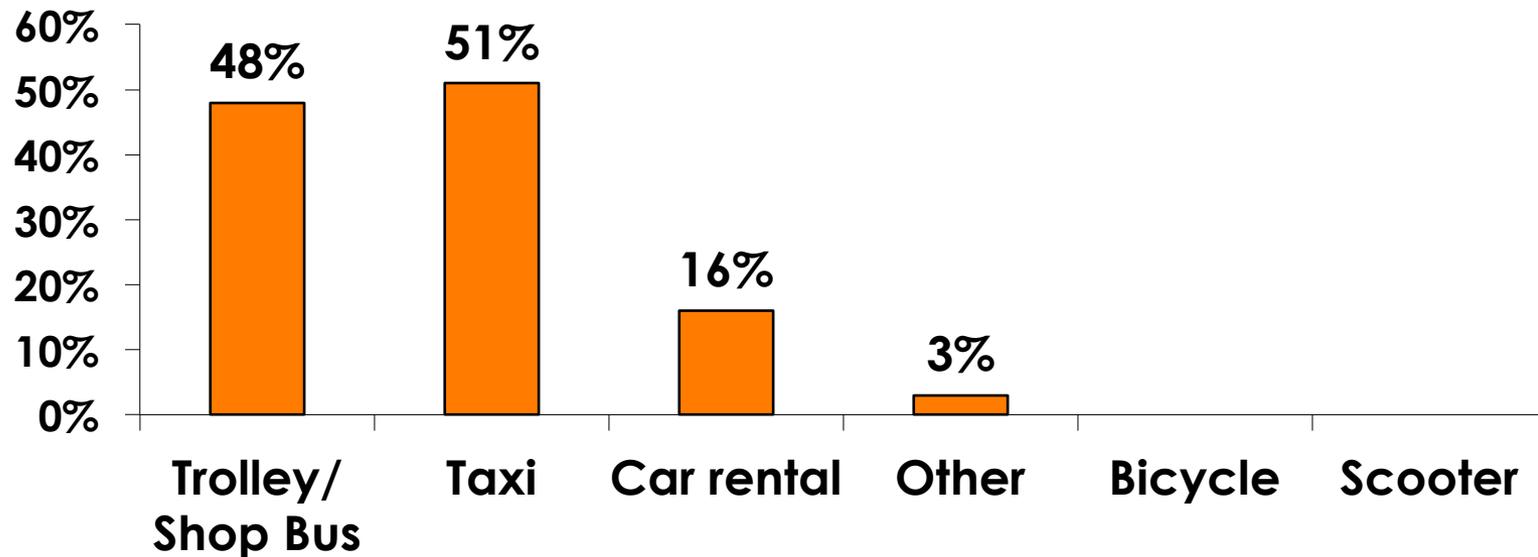
YTD=\$1,209.28

# Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$31.43
Food & beverage in fast food restaurant/ convenience store	\$36.42
Food & beverage at restaurants or drinking establishments outside a hotel	\$86.32
Optional tours and activities	\$75.26
Gifts/ souvenirs for yourself/companions	\$326.26
Gifts/ souvenirs for friends/family at home	\$122.42
Local transportation	\$13.50
Other expenses not covered	\$190.41
<b>Average Total</b>	<b>\$836.37</b>

# Local Transportation

n=75



Mean=\$13.50 per travel party

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# Guam Airport Expenditures

- \$23.50 = Mean
- \$8 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$500 = Maximum (highest amount recorded for the entire sample)

---

# Breakdown of Airport Expenditures

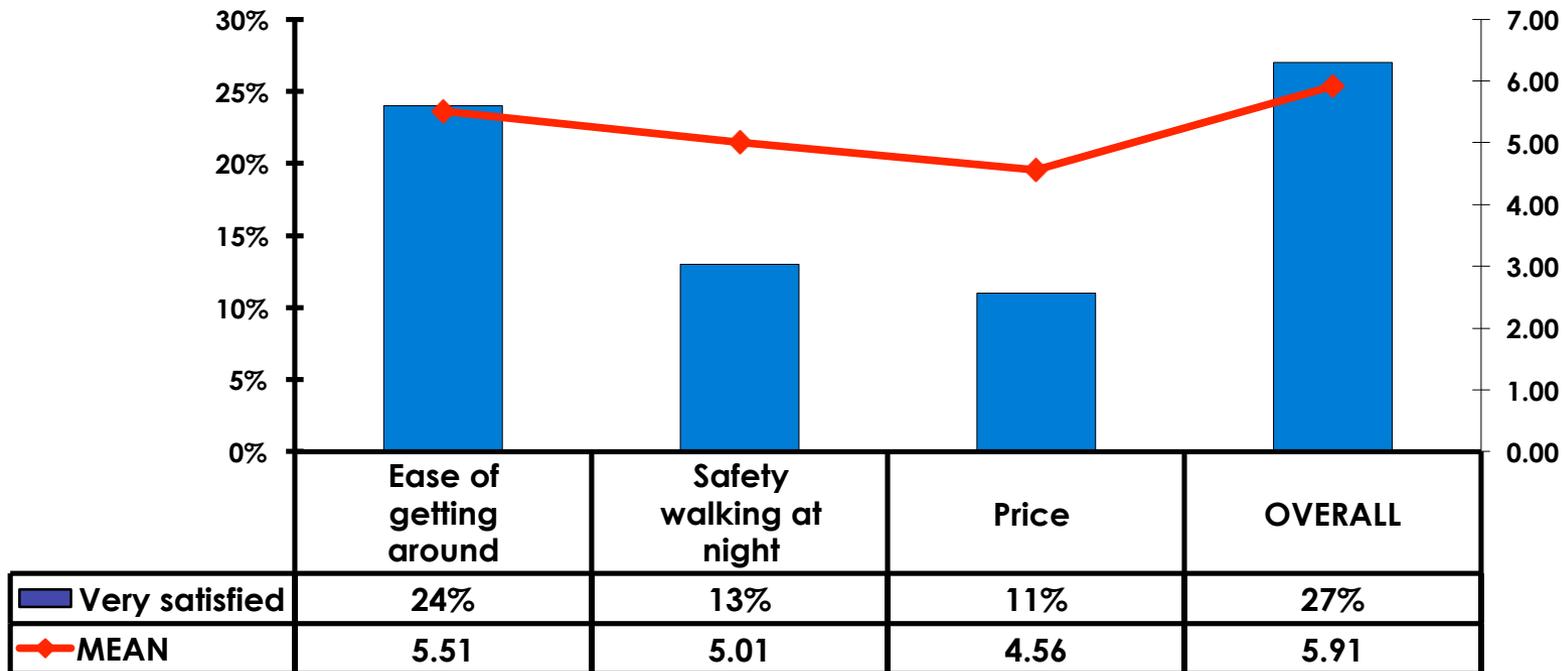
	<b>MEAN \$</b>
<b>Food &amp; Beverages</b>	\$8.48
<b>Gifts/Souvenirs Self</b>	\$7.49
<b>Gifts/Souvenirs Others</b>	\$7.53
<b>Total</b>	<b>\$23.50</b>

# SECTION 4 **VISITOR SATISFACTION**

# Satisfaction Scores Overall

7pt Rating Scale

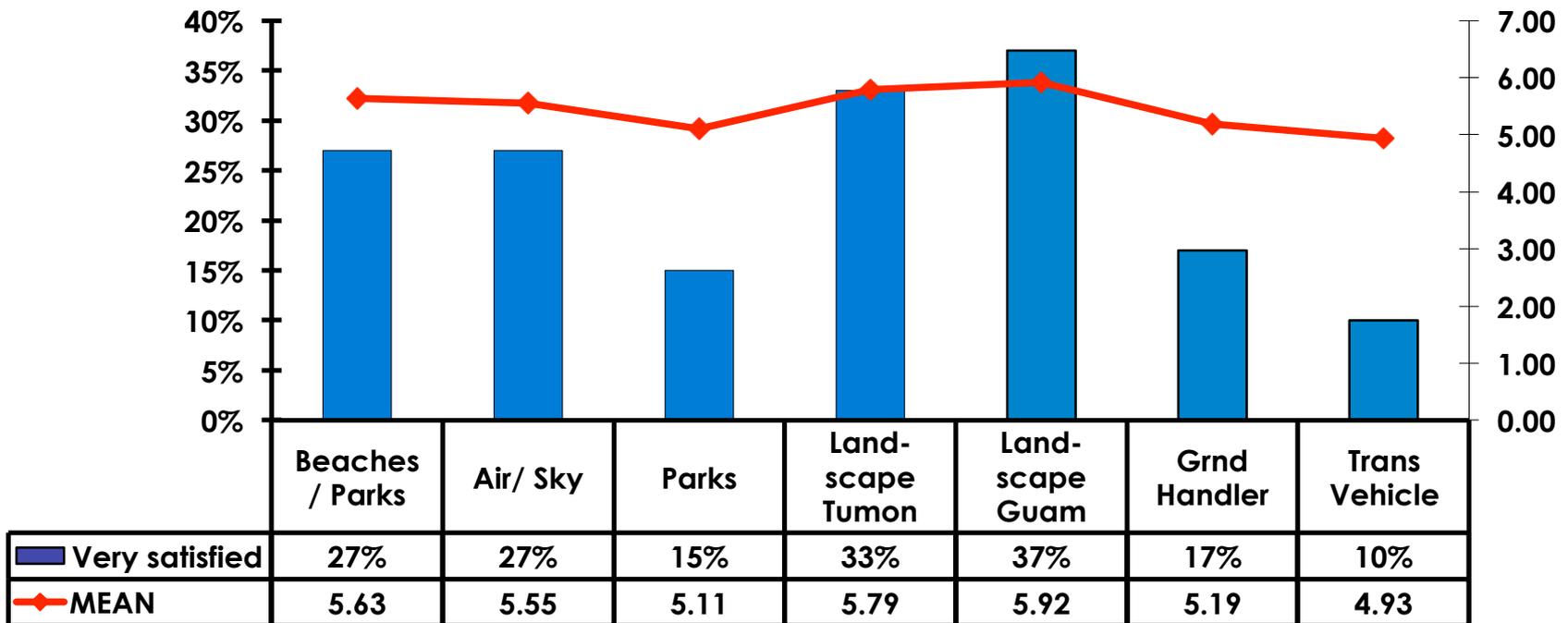
7=Very Satisfied/1=Very Dissatisfied



# Satisfaction Quality/ Cleanliness

7pt Rating Scale

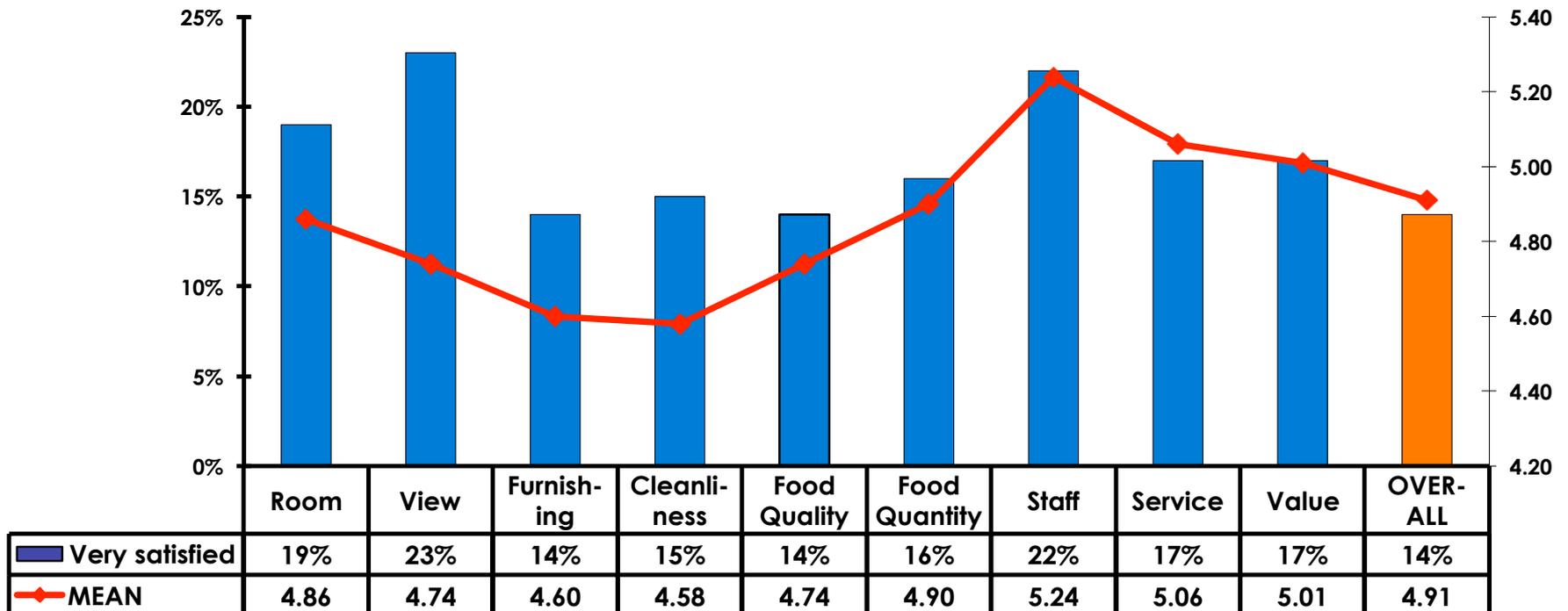
7=Very Satisfied/1=Very Dissatisfied



# Quality of Accommodations

7pt Rating Scale

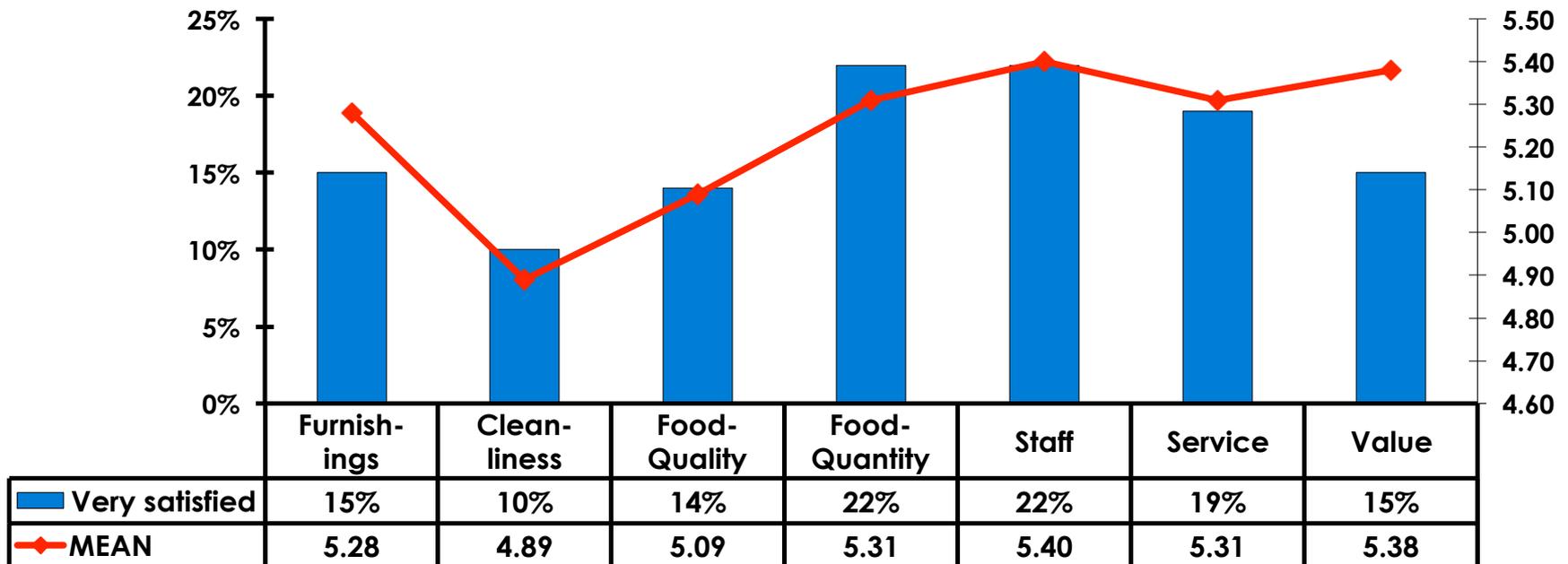
7=Very Satisfied/1=Very Dissatisfied



# Quality of Dining Experience

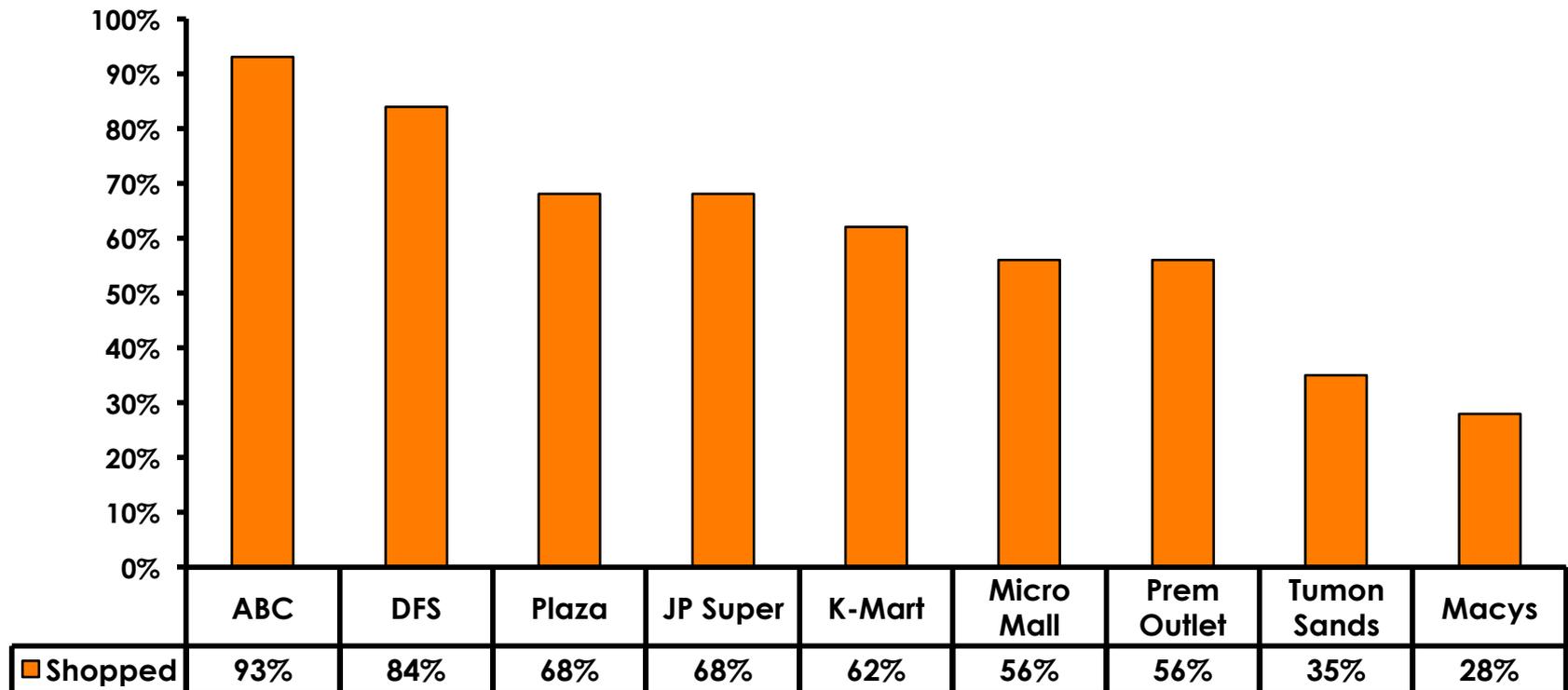
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



# Visits to Shopping Centers/Malls on Guam

## Top responses



# Satisfaction with Shopping

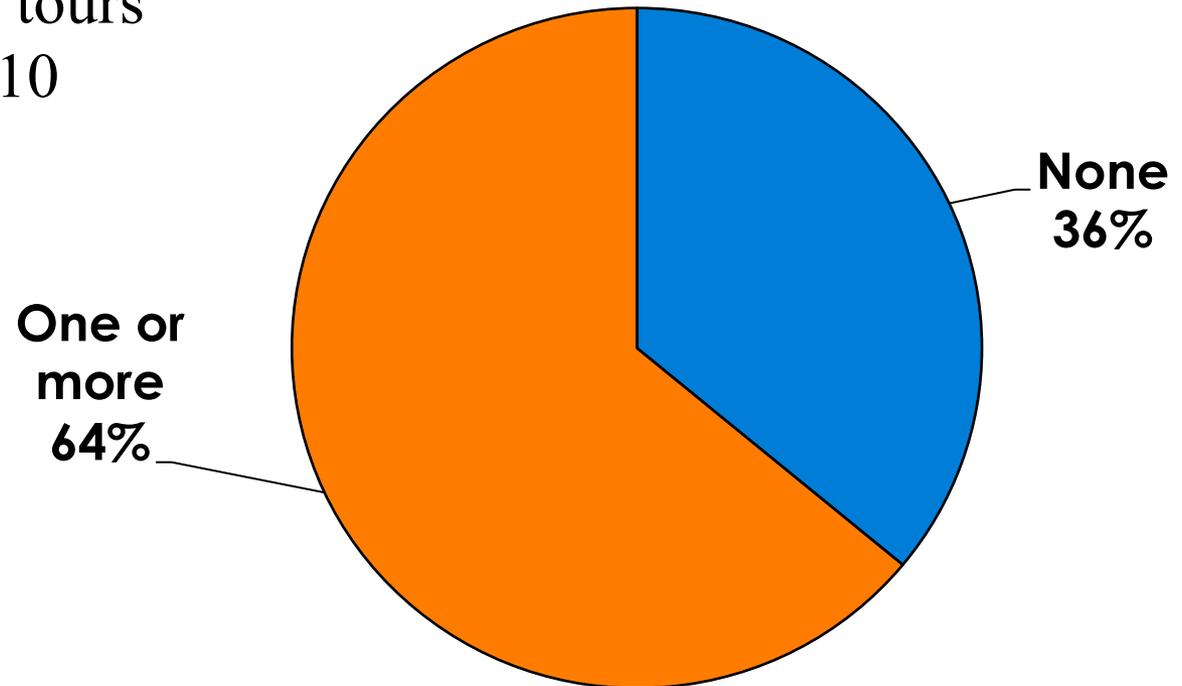
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = <b>54%</b>	Score of 6 to 7 = <b>55%</b>
Score of 4 to 5 = <b>42%</b>	Score of 4 to 5 = <b>39%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>6%</b>
<b>MEAN = 5.48</b>	<b>MEAN = 5.47</b>

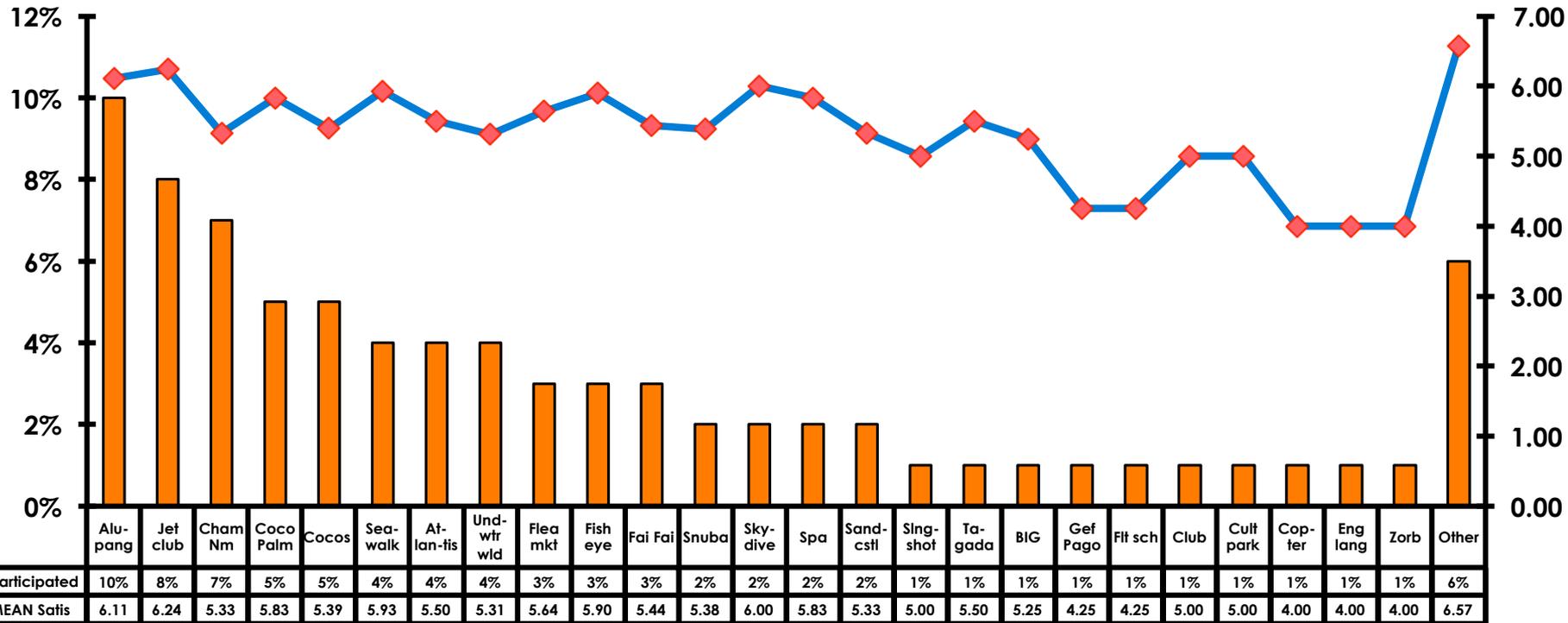
# Optional Tour Participation

- Average number of tours participated in is 1.10



# Optional Tours

## Participation & Satisfaction



# Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = <b>56%</b>	Score of 6 to 7 = <b>53%</b>
Score of 4 to 5 = <b>41%</b>	Score of 4 to 5 = <b>44%</b>
Score 1 to 3 = <b>4%</b>	Score 1 to 3 = <b>2%</b>
<b>MEAN = 5.45</b>	<b>MEAN = 5.43</b>

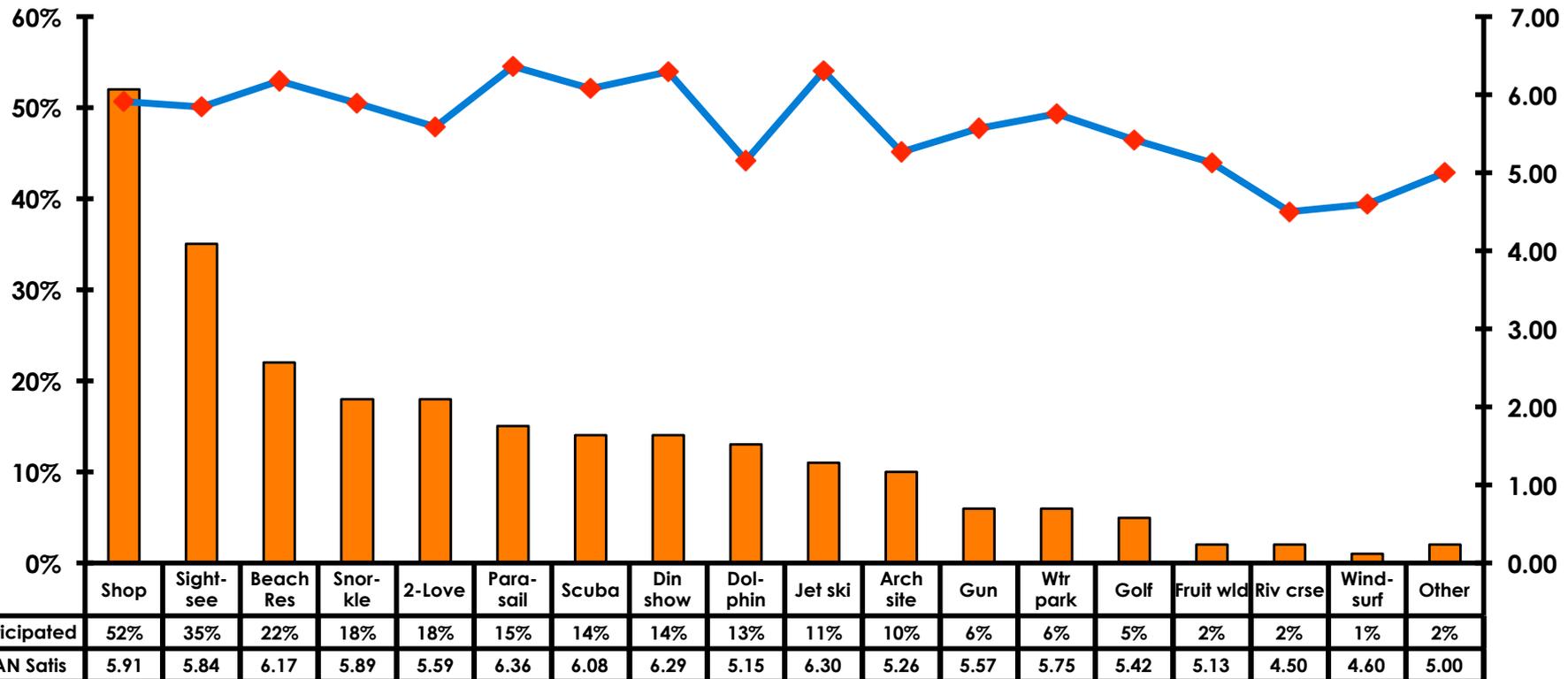
# Night Tours Satisfaction

7pt Rating Scale

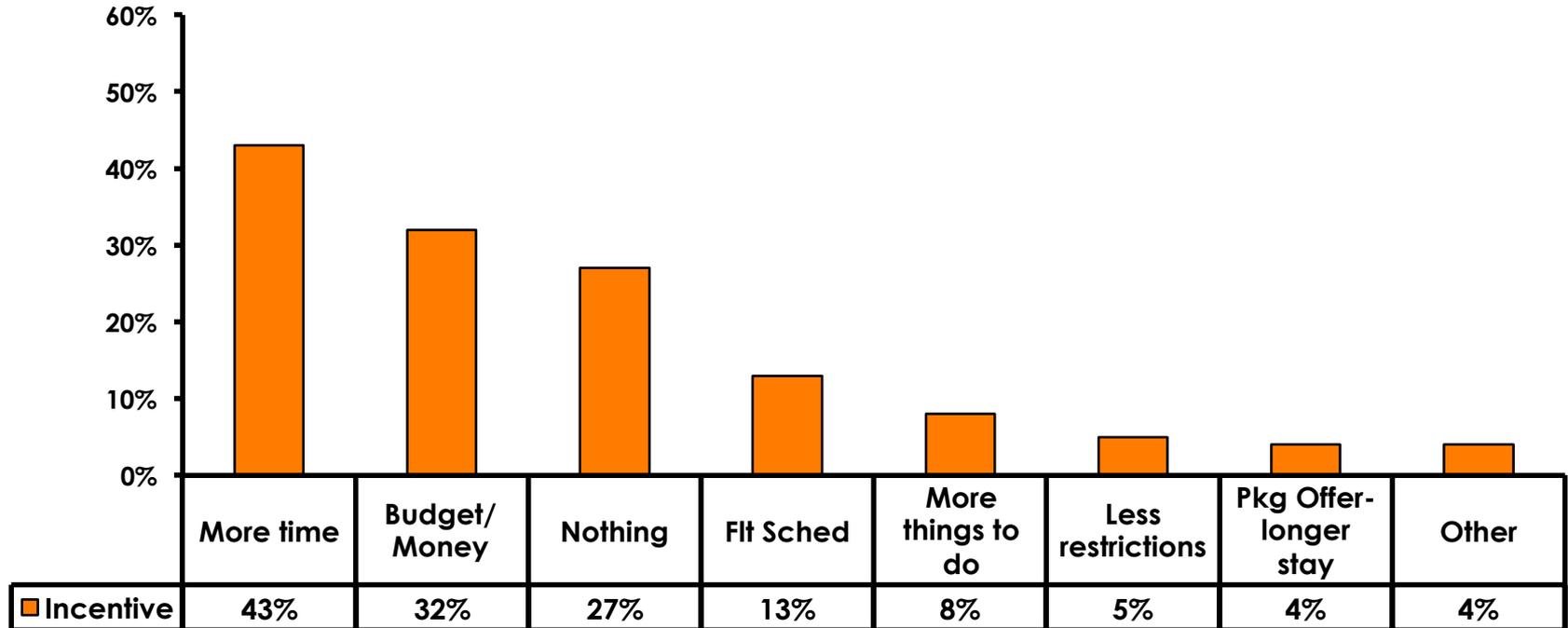
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = <b>28%</b>	Score of 6 to 7 = <b>28%</b>
Score of 4 to 5 = <b>68%</b>	Score of 4 to 5 = <b>70%</b>
Score 1 to 3 = <b>3%</b>	Score 1 to 3 = <b>2%</b>
<b>MEAN = 4.72</b>	<b>MEAN = 4.74</b>

# Satisfaction with Other Activities



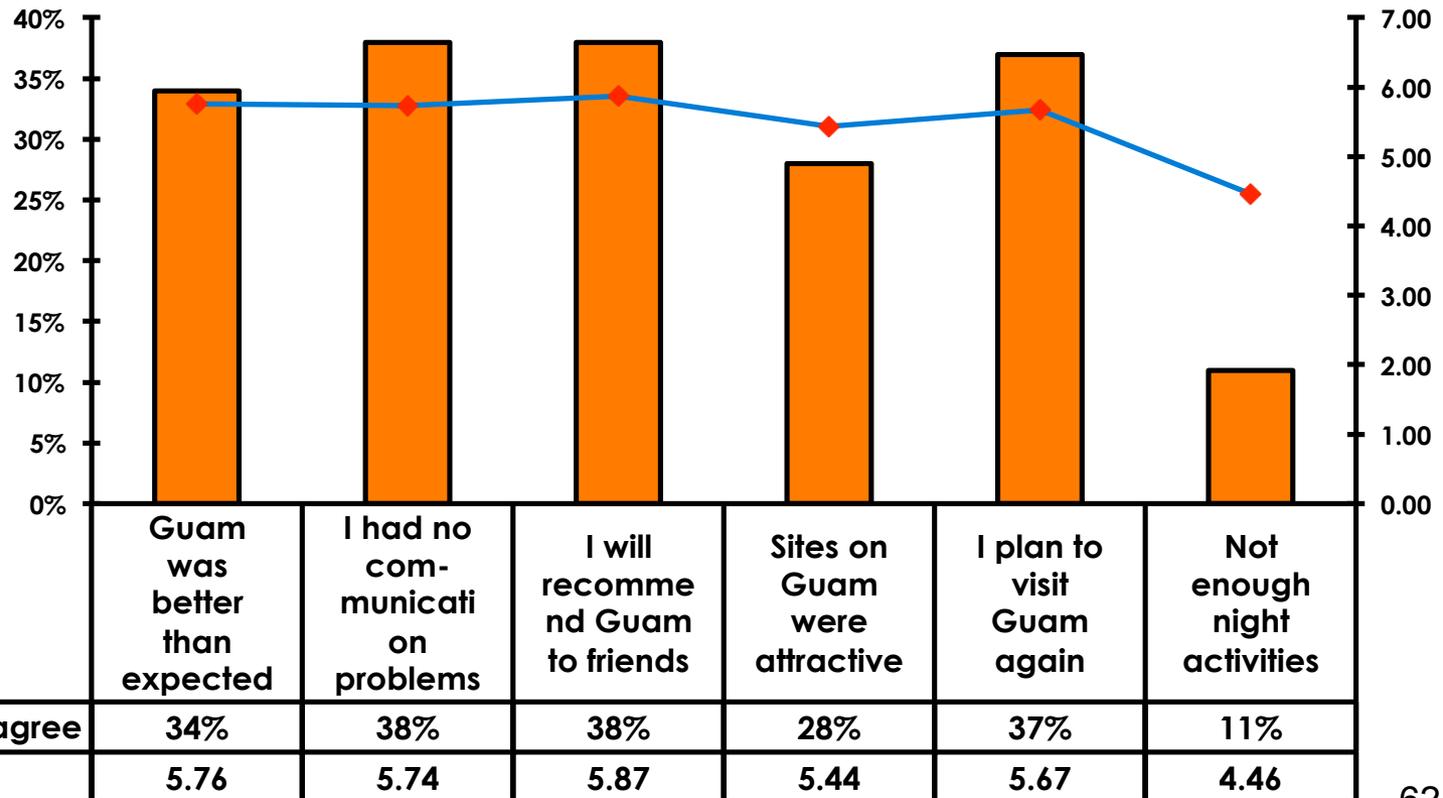
# What would it take to make you want to stay an extra day in Guam?



# On-Island Perceptions

7pt Rating Scale

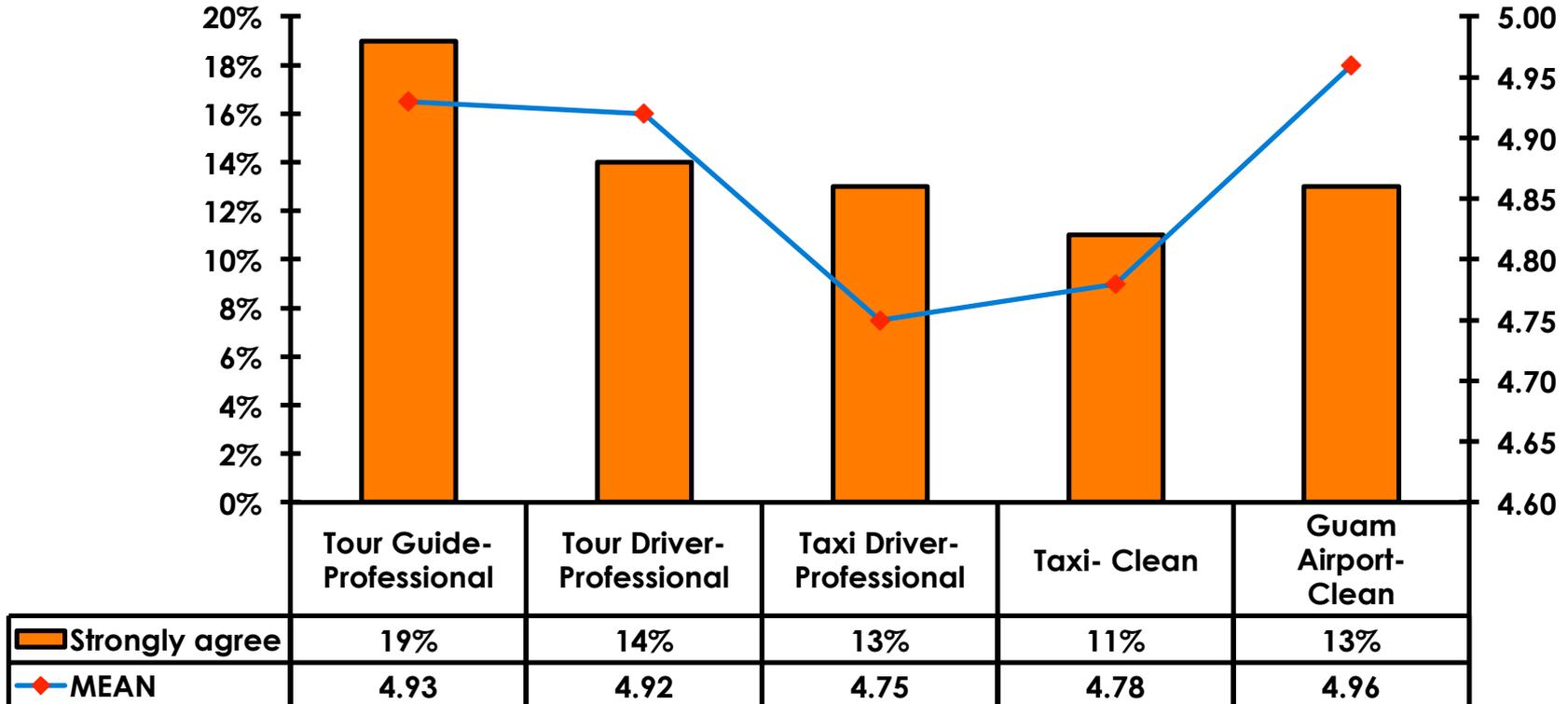
7=Very Satisfied/ 1=Very Dissatisfied



# On-Island Perceptions

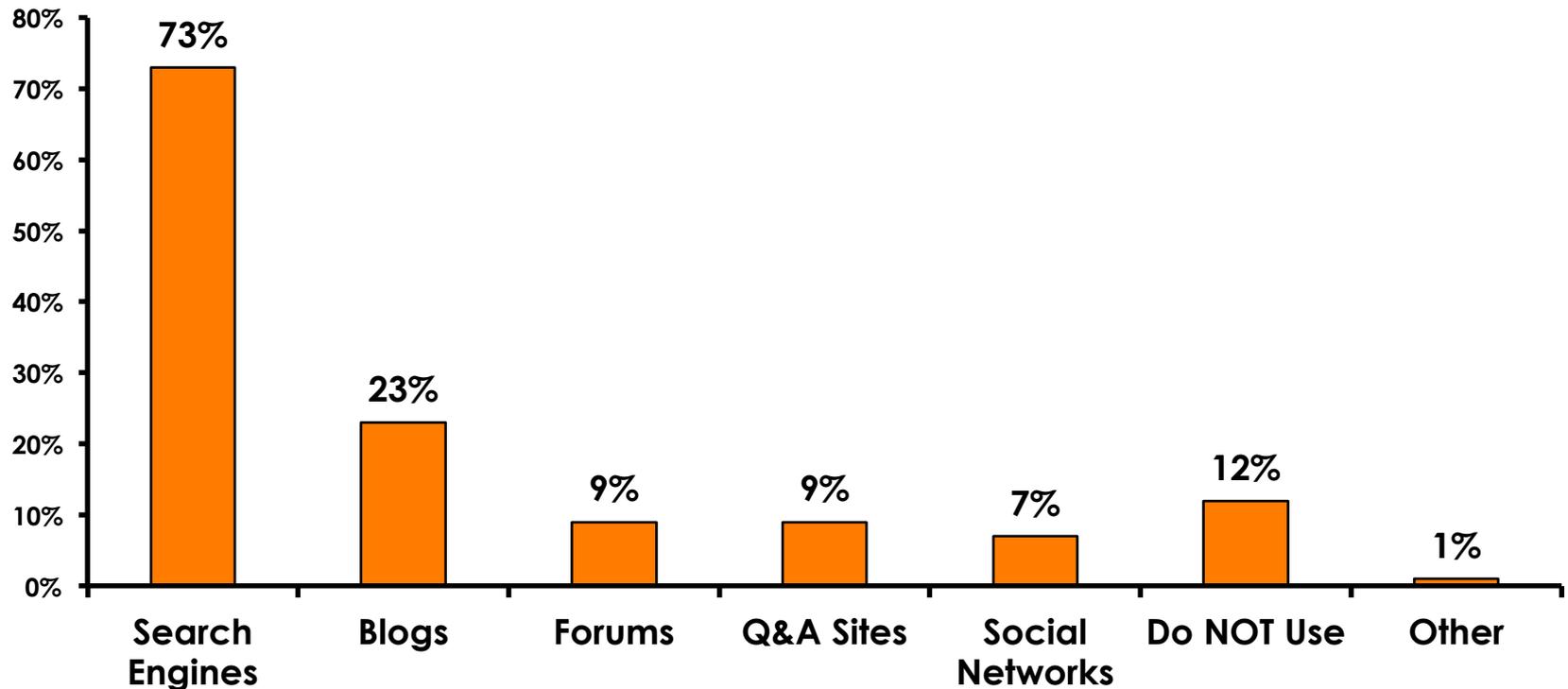
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



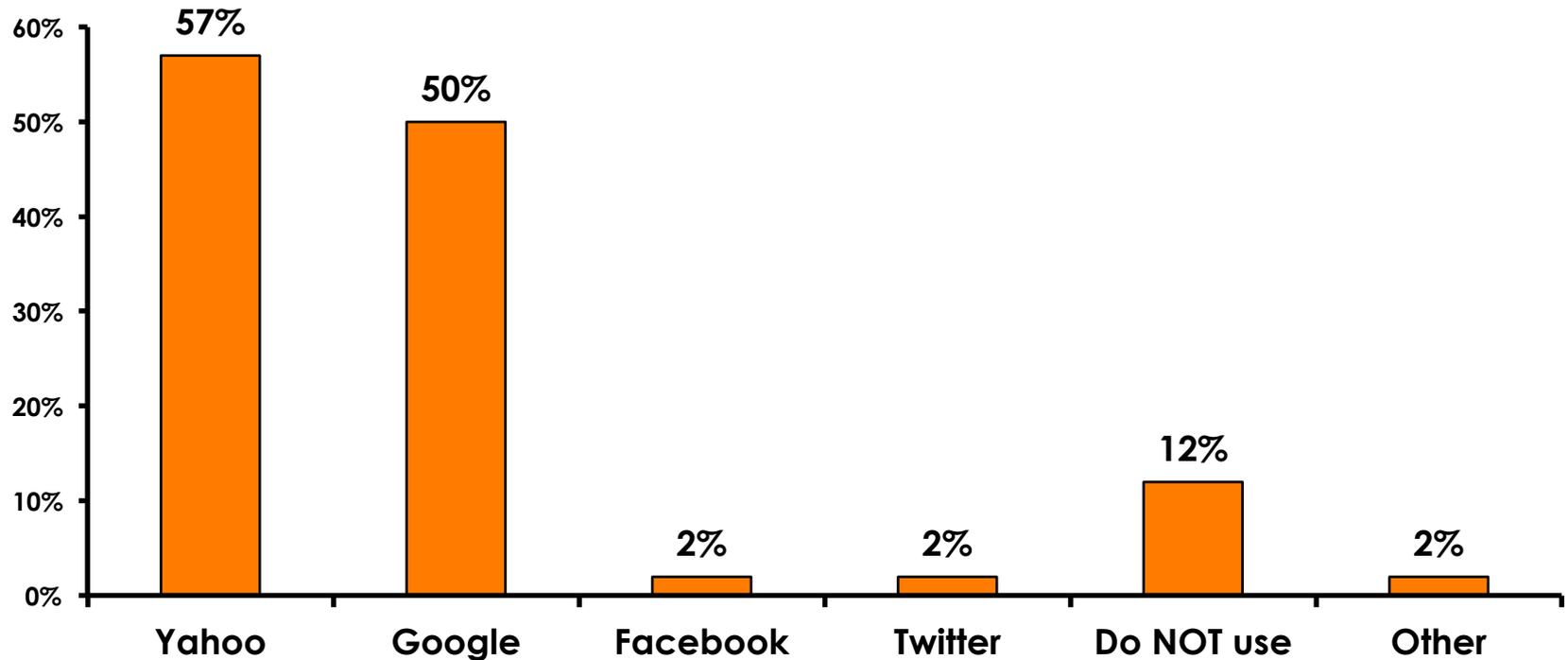
# SECTION 5 **PROMOTIONS**

# Internet- Guam Sources of Info

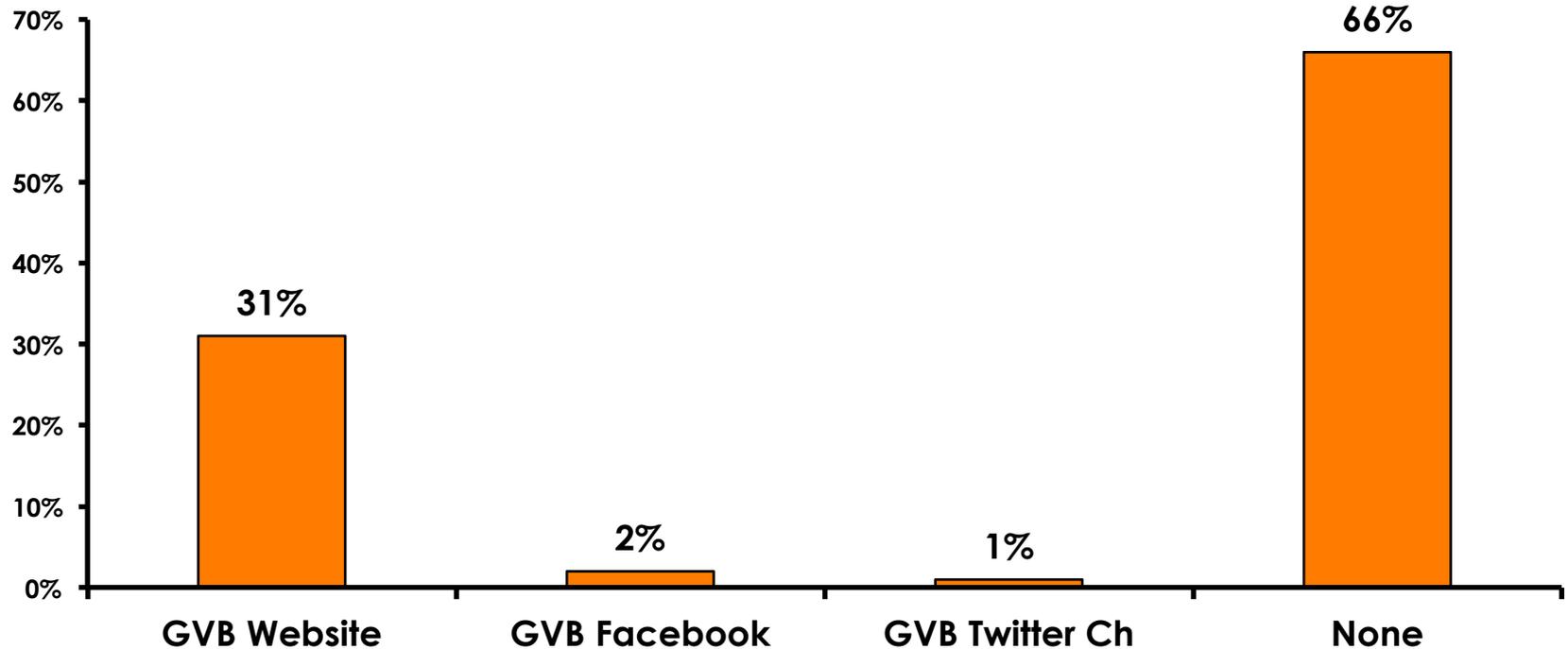


# Internet- Things To Do

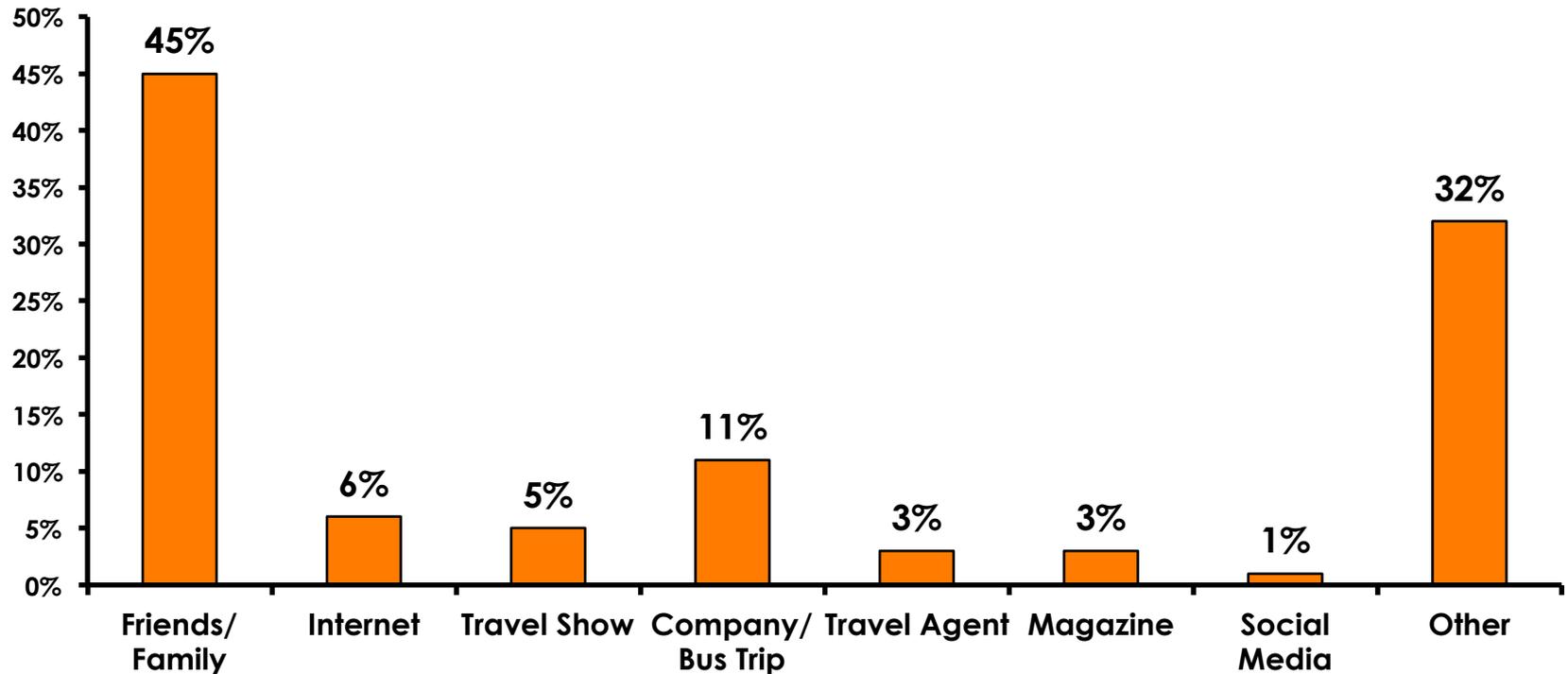
## Sources of Info



# Internet- GVB Sources

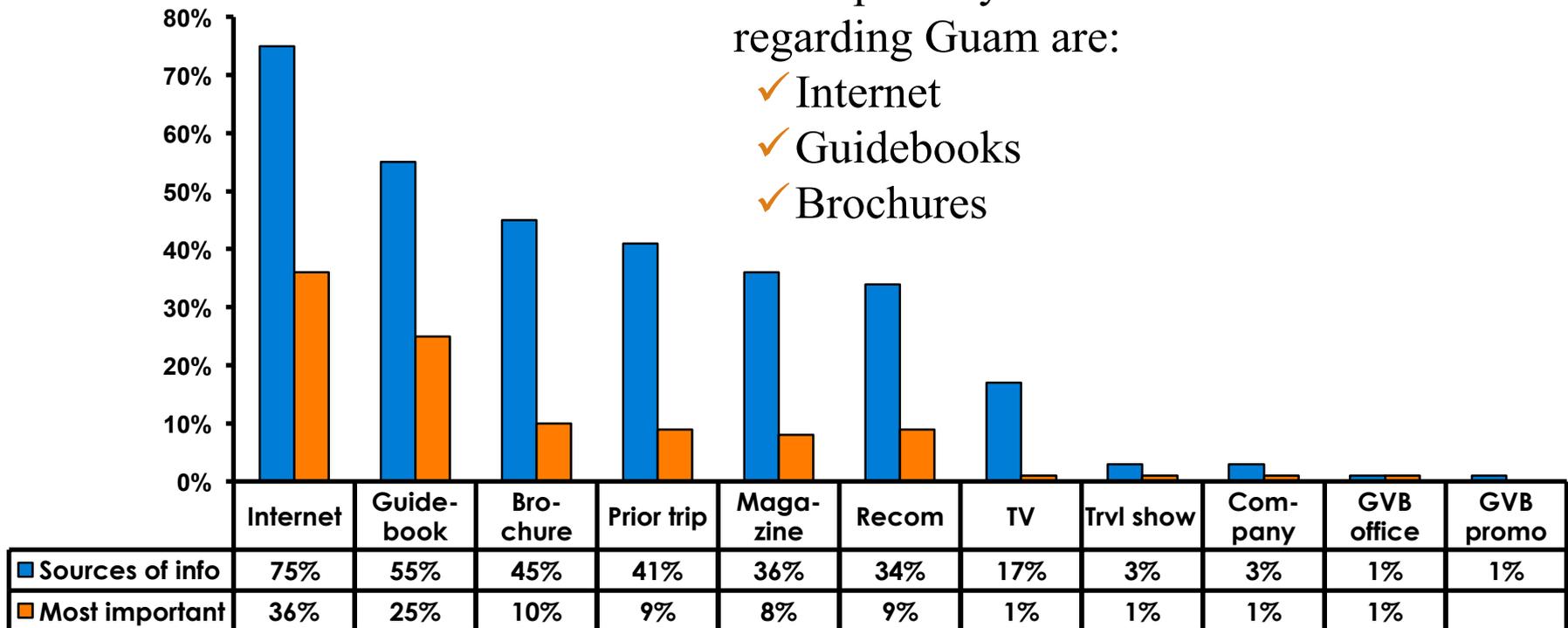


# Travel Motivation- Info Sources



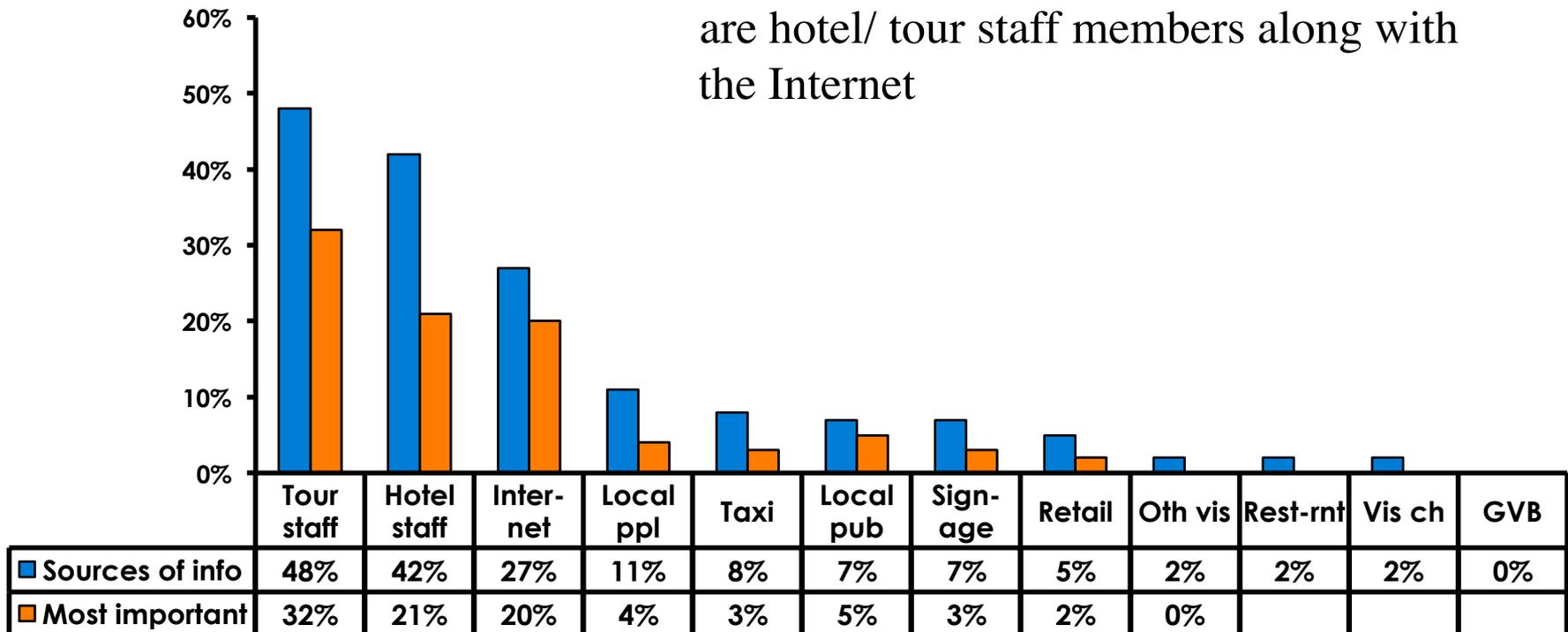
# Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
  - ✓ Internet
  - ✓ Guidebooks
  - ✓ Brochures



# Sources of Information Post-arrival

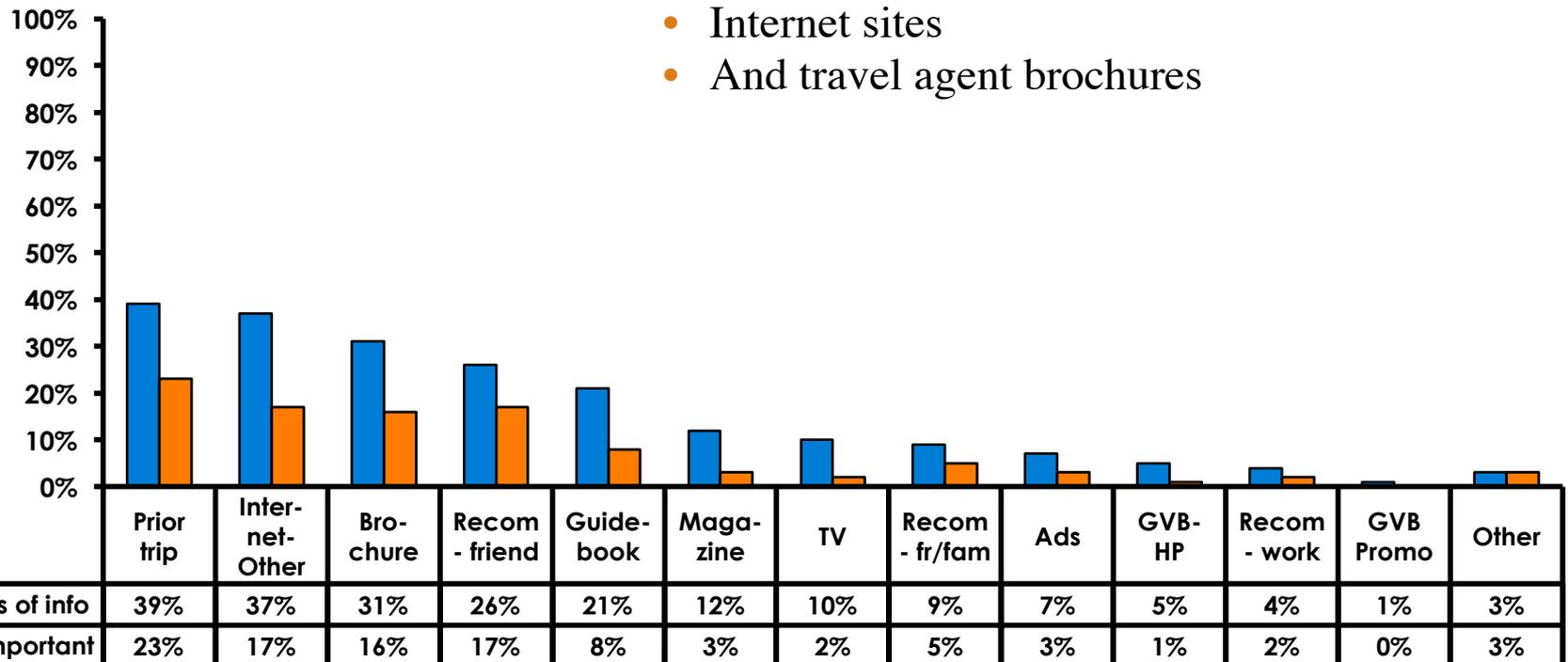
- The primary local source of information are hotel/ tour staff members along with the Internet



# Sources of Information - Motivation

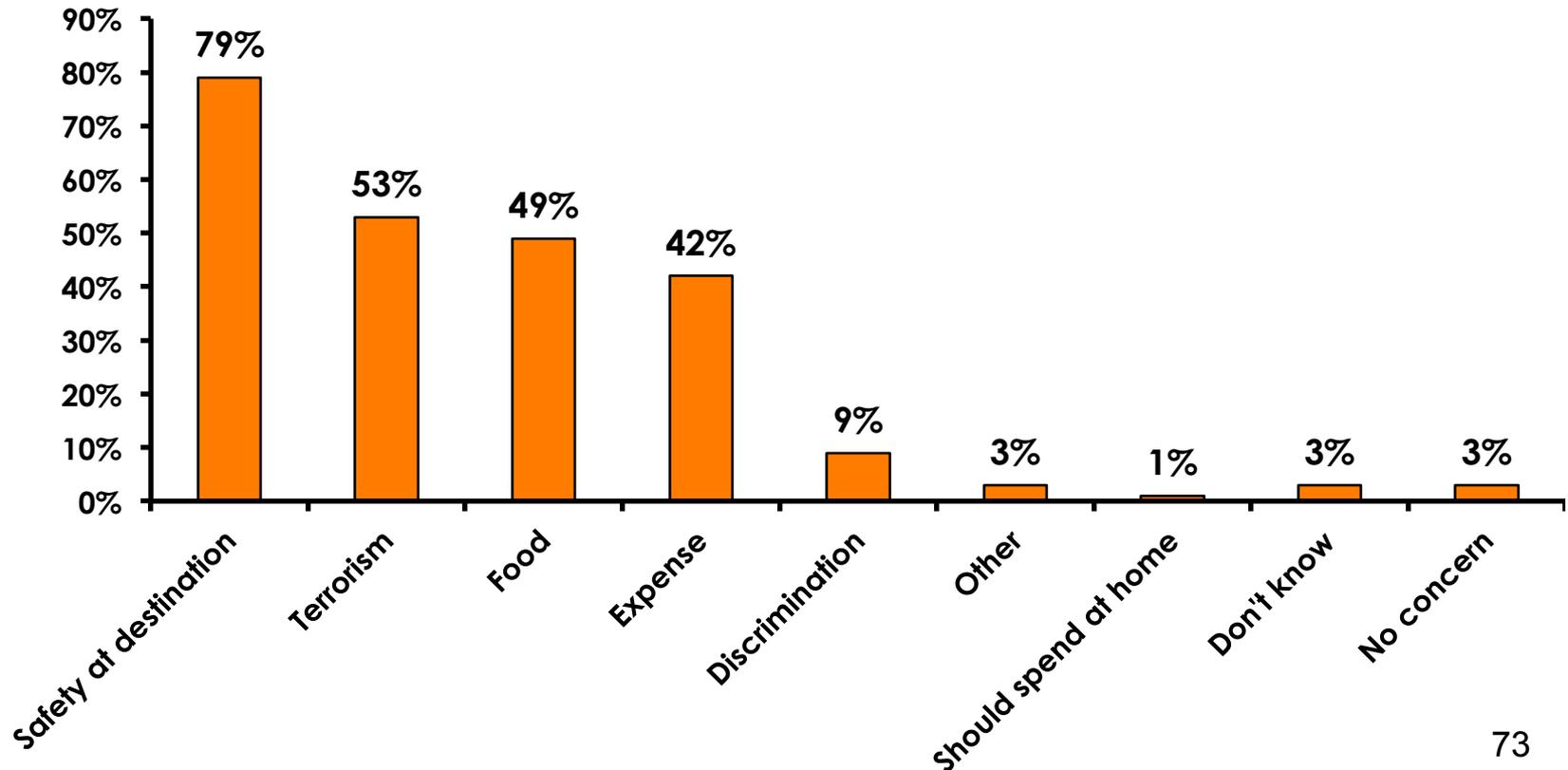
The primary motivational sources of information were.

- Prior trip to Guam,
- Internet sites
- And travel agent brochures



# SECTION 6 **OTHER ISSUES**

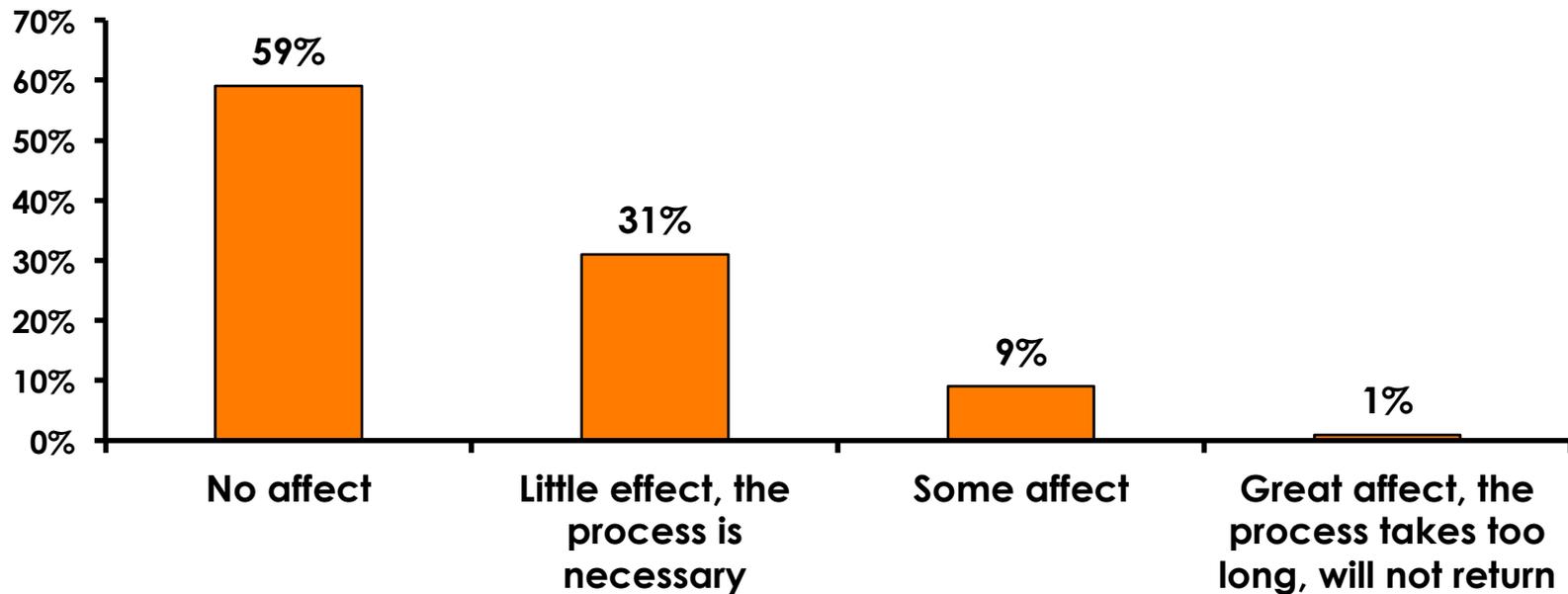
# Concerns about travel outside of Japan - Overall



# Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	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	79%	76%	81%	80%	85%	72%	81%	77%	85%	76%	84%	79%	54%	
	Terrorism	53%	45%	61%	55%	44%	34%	64%	55%	62%	48%	56%	54%	38%	
	Food	49%	44%	56%	43%	62%	34%	36%	52%	54%	53%	58%	56%	31%	
	Expense	42%	46%	44%	35%	41%	45%	50%	29%	48%	48%	40%	36%	46%	
	Discrimination against Japanese	9%	6%	6%	14%	9%	3%	6%	3%	10%	10%	5%	15%	15%	
	No concerns	3%	3%	4%	2%	9%	3%	3%	3%	2%	5%	2%	8%		
	Other	3%	4%	5%	1%		7%	3%		8%	2%	5%			
	Don't know	3%	4%	2%	3%		7%		3%		3%	2%			
	Should spend at home	1%			2%						2%		3%		
	Total	Count	350	112	111	91	34	29	36	31	52	62	43	39	13

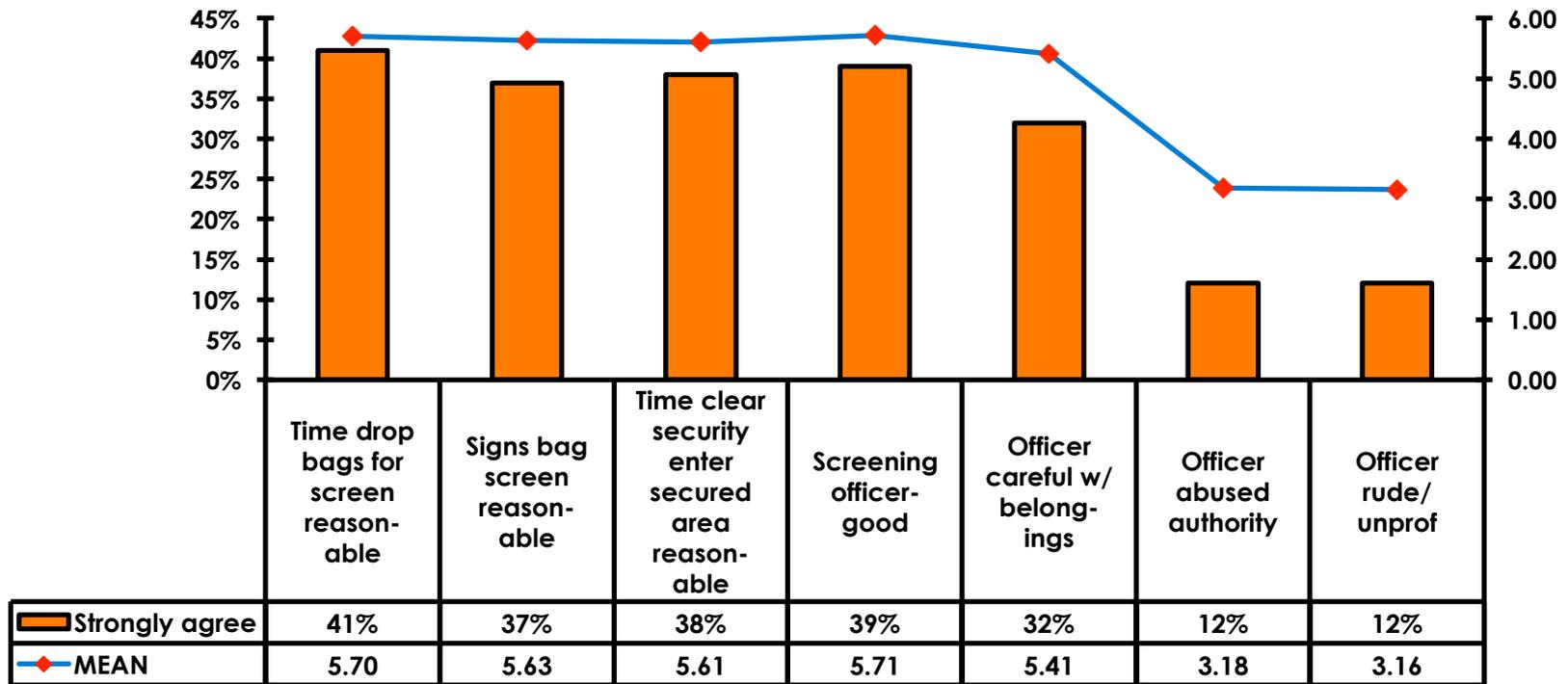
# Security Screening/ Immigration Process at Guam International Airport



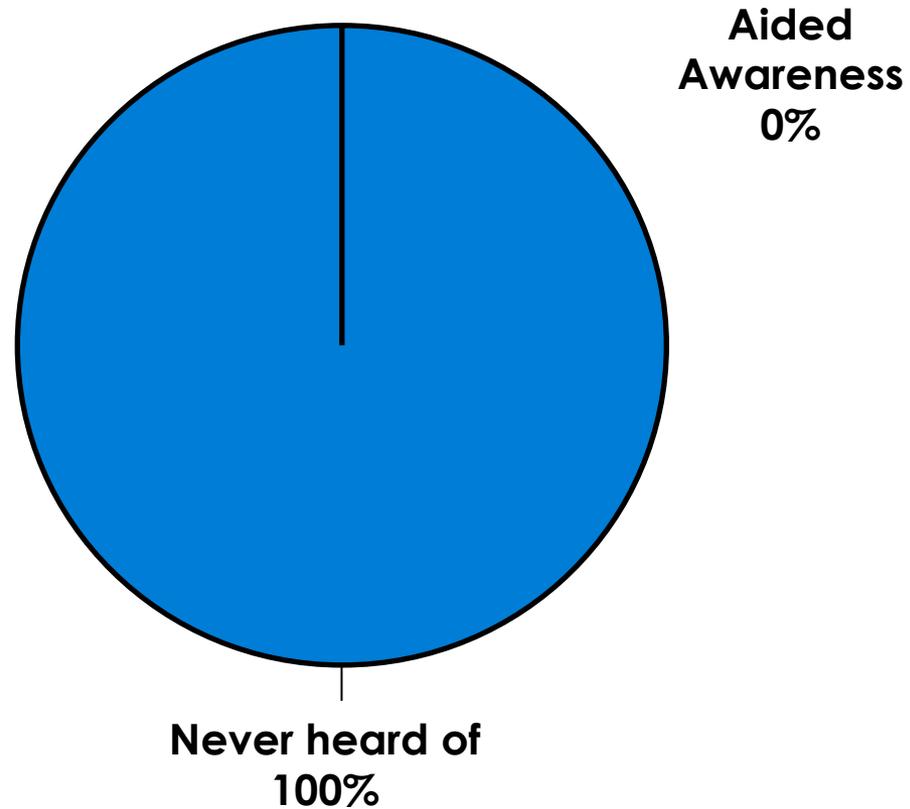
# Airport Screening

## 7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



# Shop Guam Festival



# Shop Guam Festival - Impact

n=1

