



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

JULY 2014



Prepared by: QMark Research

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Background & Methodology

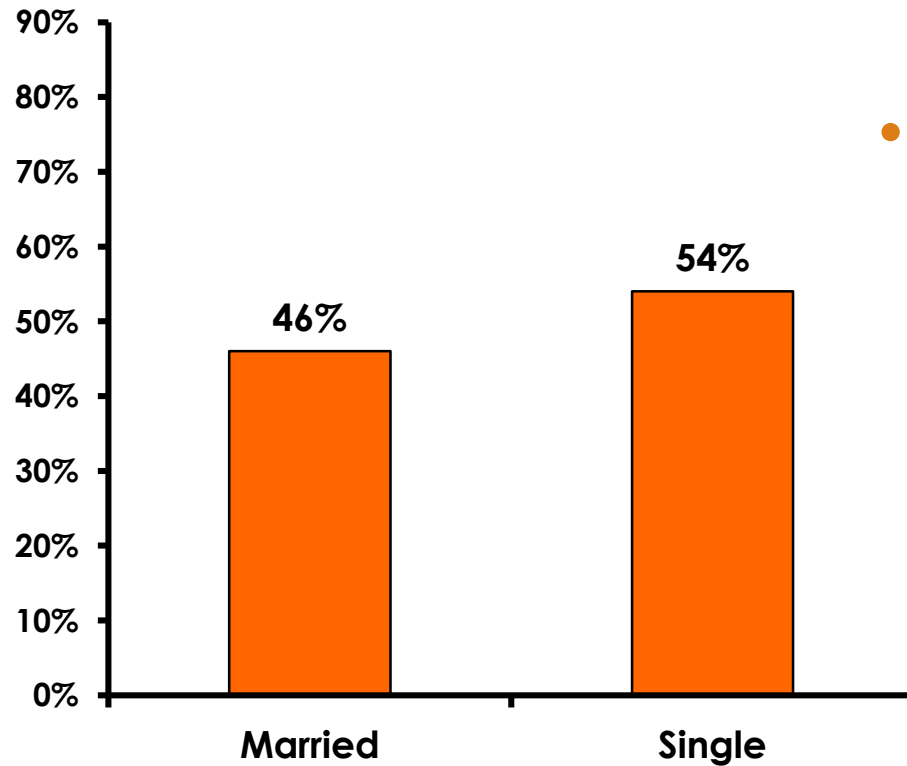
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **351** departing 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 **351** 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.

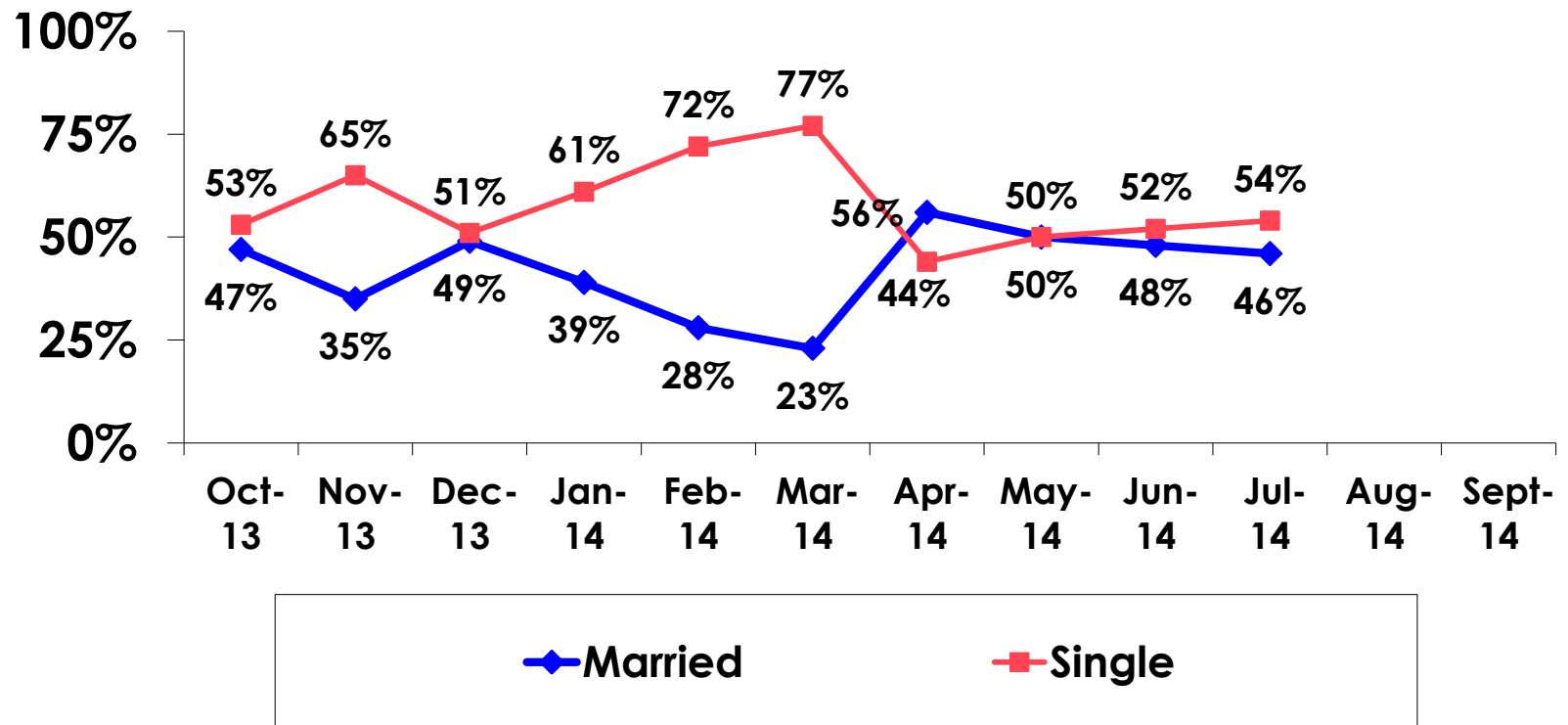
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

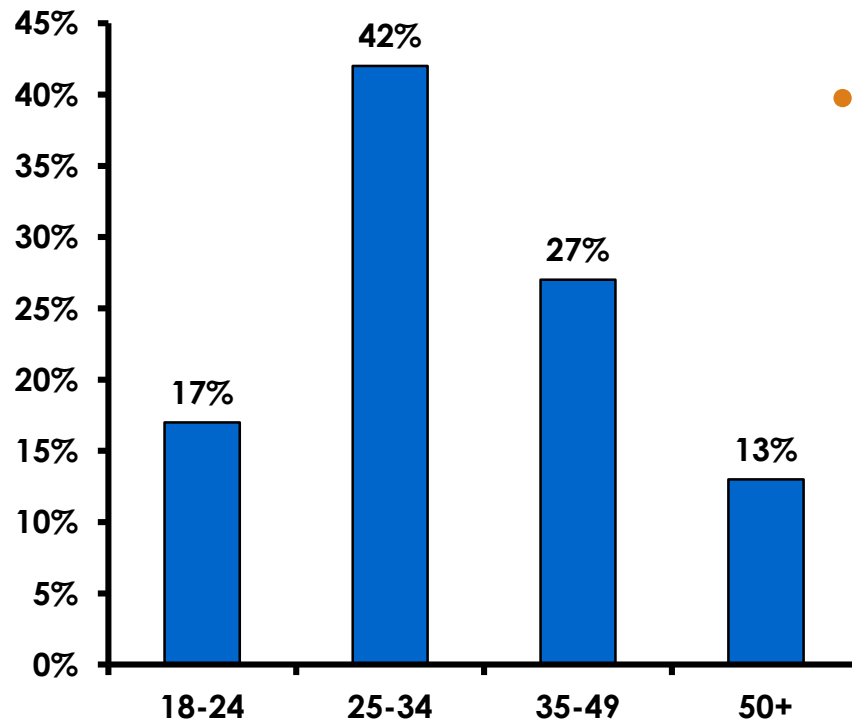


- 73% of female visitors are single.

MARITAL STATUS

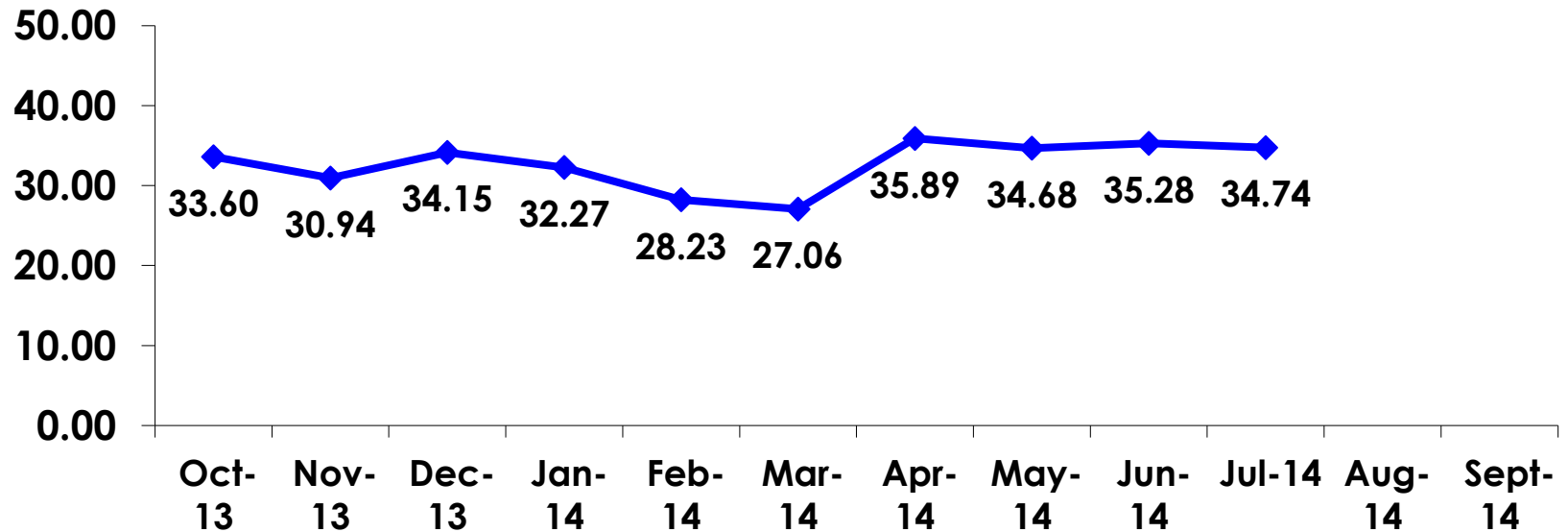


Age - Overall

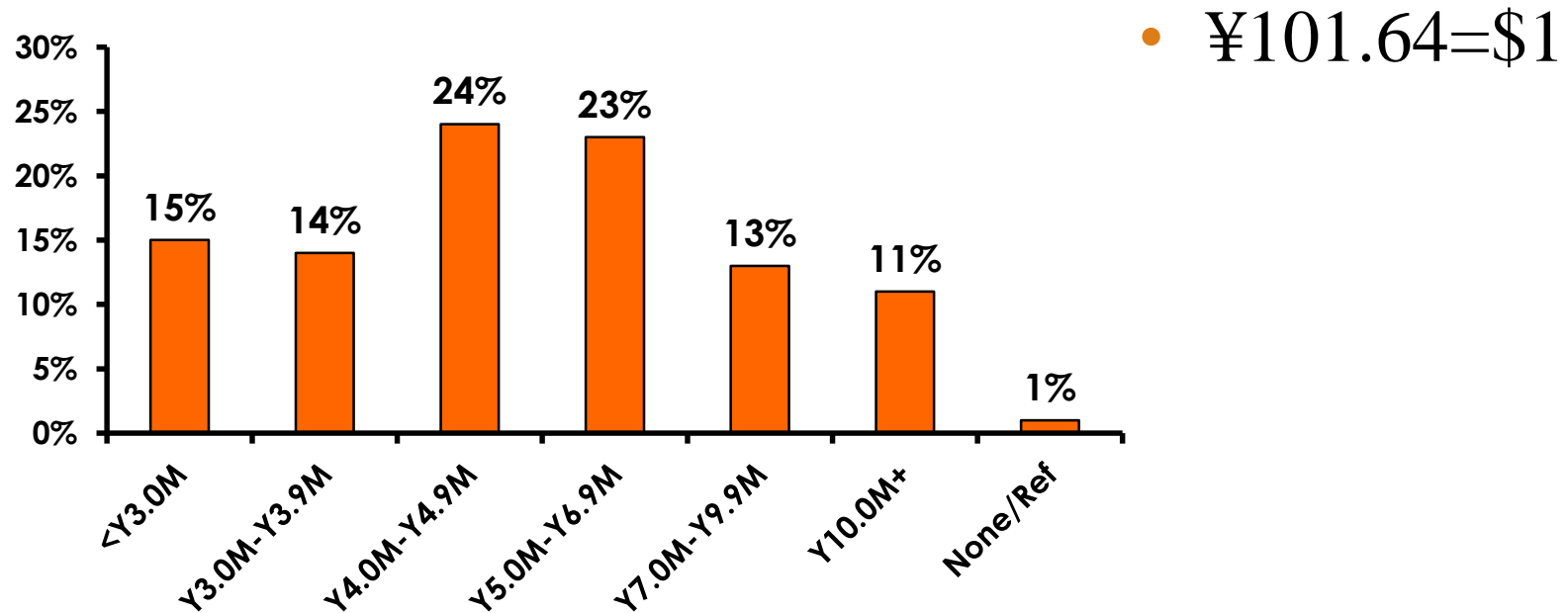


- The average age of the respondents is 34.74 years of age.

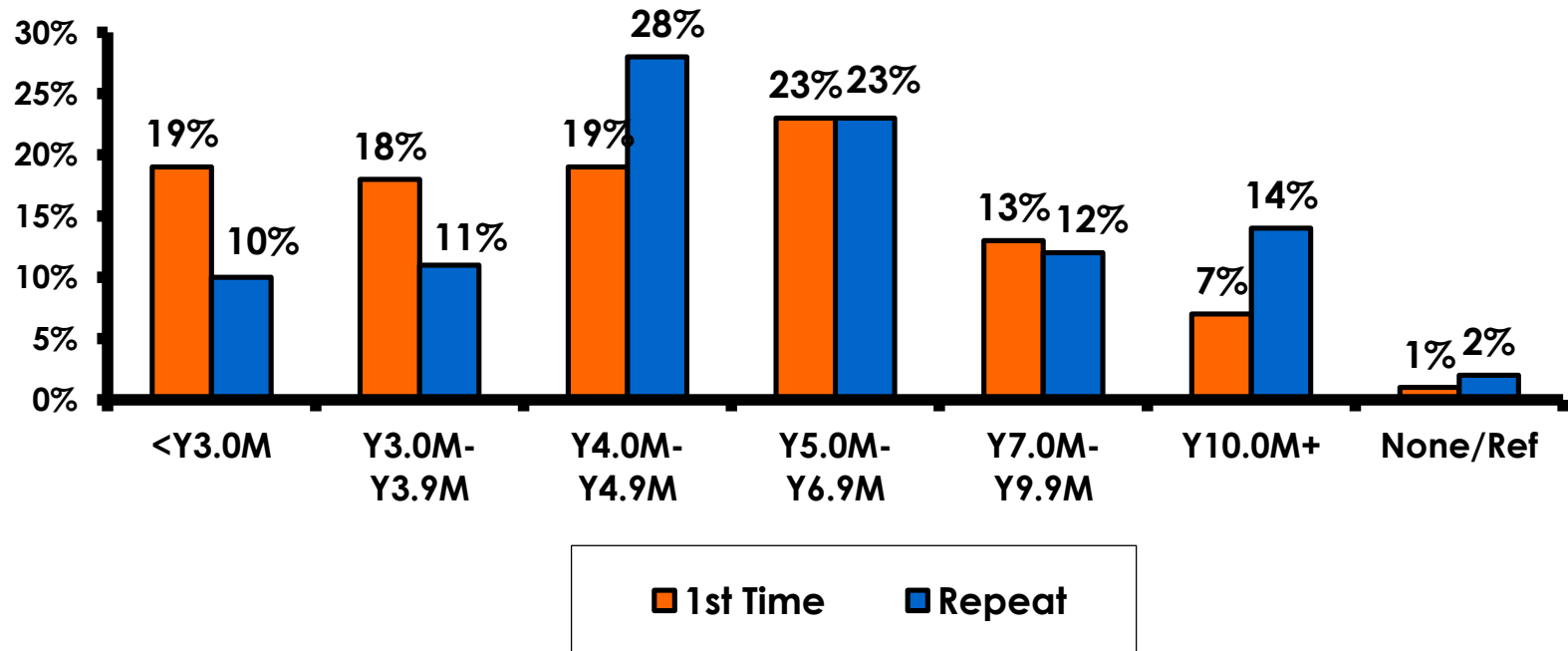
AVERAGE - AGE



Personal Income



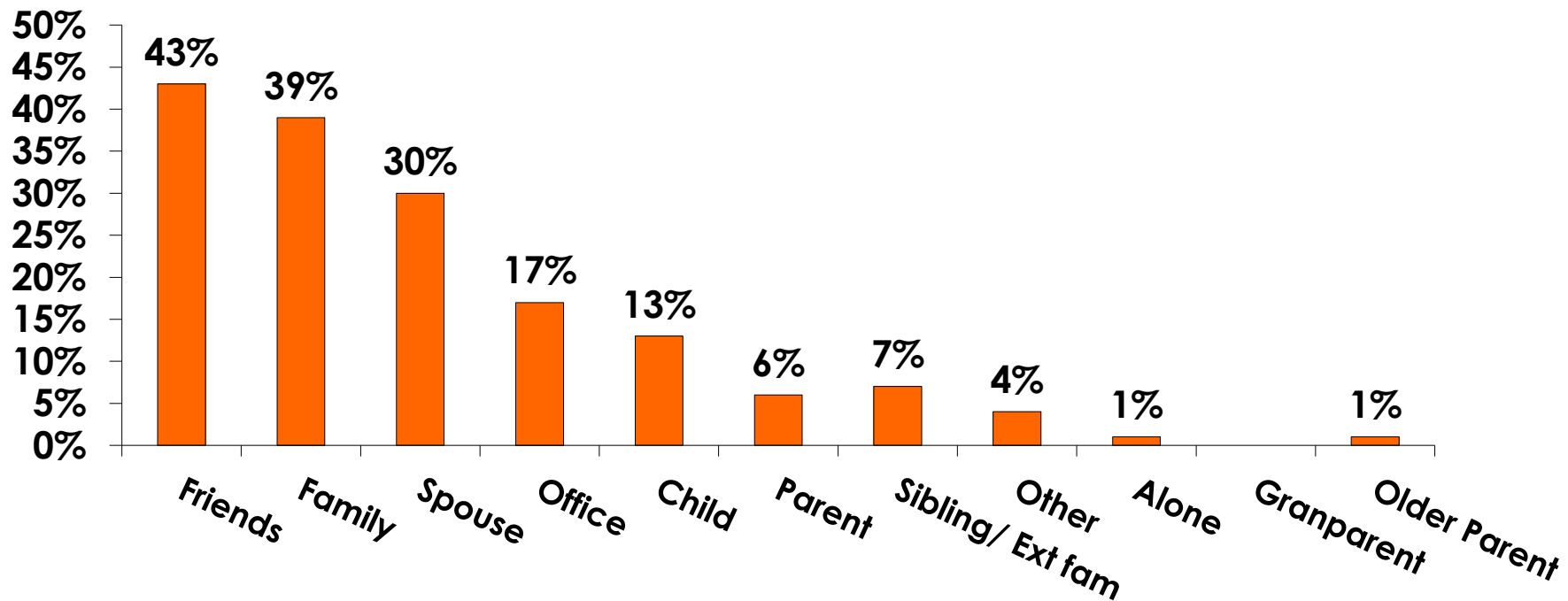
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	20	6	14	10	4	4	2
		Column N %	6%	3%	8%	17%	3%	4%	4%
	Y2.0M-Y3.0M	Count	31	12	19	10	18		3
		Column N %	9%	7%	11%	17%	12%		6%
	Y3.0M-Y4.0M	Count	49	15	34	9	29	9	1
		Column N %	14%	8%	20%	15%	20%	10%	2%
	Y4.0M-Y5.0M	Count	84	37	47	12	37	22	13
		Column N %	24%	21%	27%	20%	25%	23%	28%
	Y5.0M-Y7.0M	Count	80	48	32	3	31	30	15
		Column N %	23%	27%	19%	5%	21%	32%	32%
	Y7.0M-Y10.0M	Count	44	33	11	7	15	14	8
		Column N %	13%	19%	6%	12%	10%	15%	17%
	Y10.0M+	Count	37	24	13	5	12	15	5
		Column N %	11%	14%	8%	8%	8%	16%	11%
	No Income	Count	4	2	2	3	1		
		Column N %	1%	1%	1%	5%	1%		
	Total	Count	349	177	172	59	147	94	47

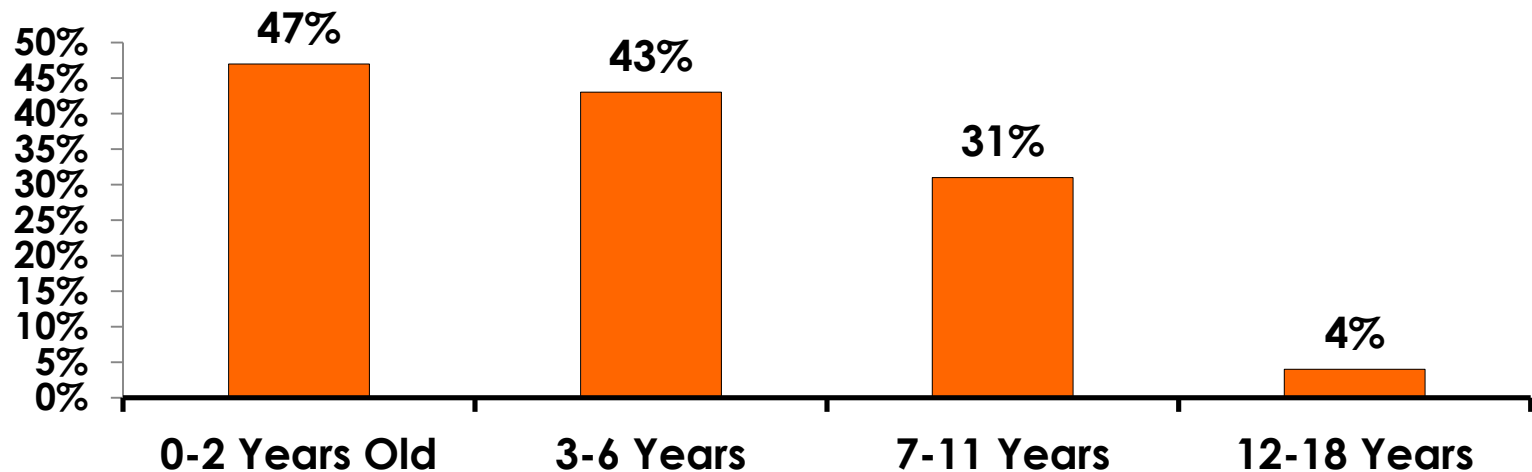
Travel Companions



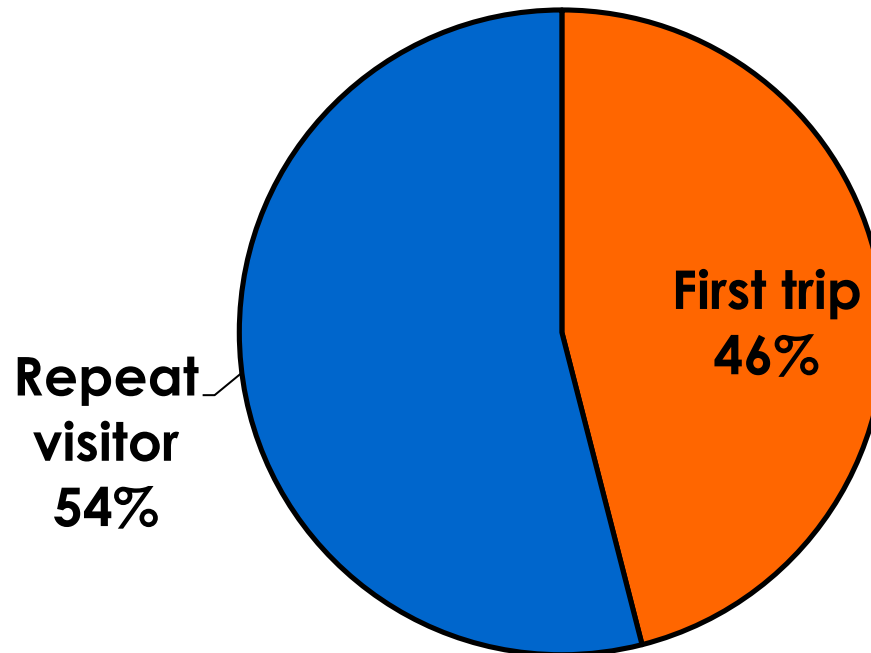
Number of Children Travel Party

N=45 total respondents traveling with children.

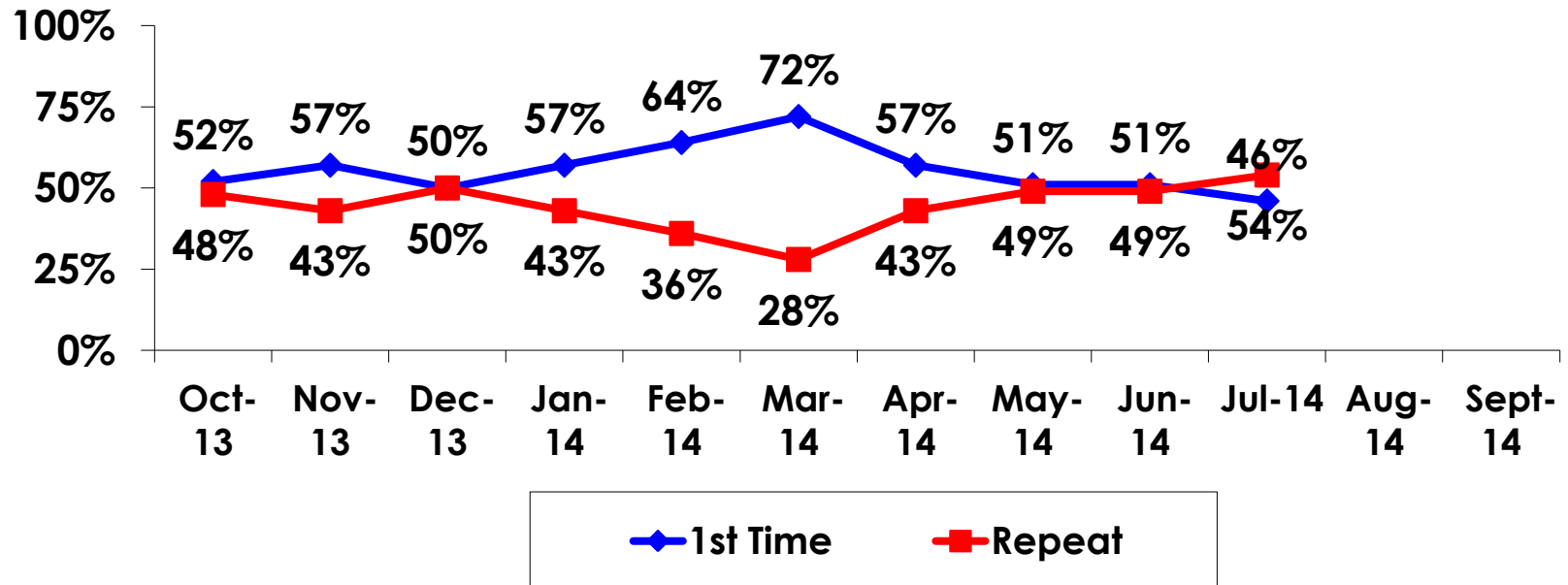
(Of those N=45 respondents, there is a total of 67 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



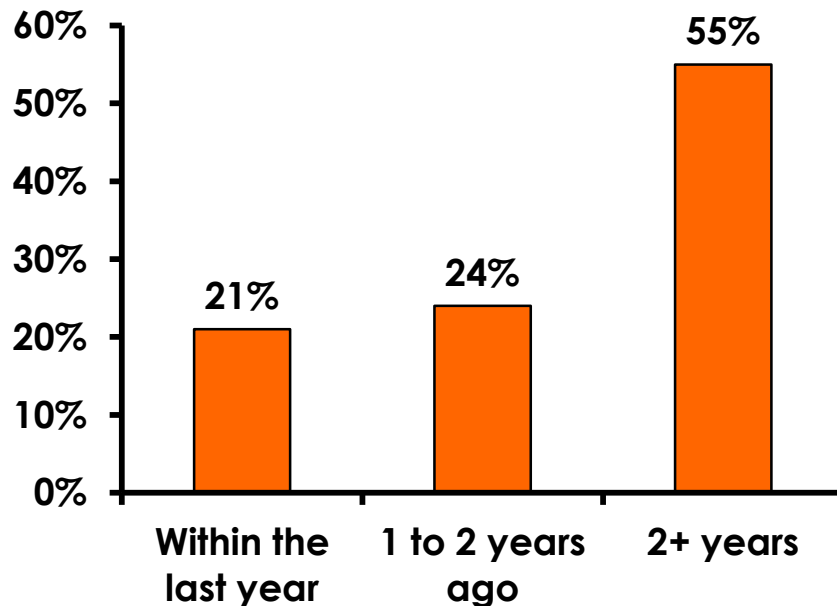
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM		
			-	1st	Repeat	
GENDER	Male	Count	177	88	89	
		Column N %	50%	54%	47%	
	Female	Count	174	75	99	
		Column N %	50%	46%	53%	
	Total	Count	351	163	188	
AGE	18-24	Count	60	34	26	
		Column N %	17%	21%	14%	
	25-34	Count	148	85	63	
		Column N %	42%	53%	34%	
	35-49	Count	94	33	61	
		Column N %	27%	20%	32%	
	50+	Count	47	9	38	
		Column N %	13%	6%	20%	
		Total	Count	349	161	188

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

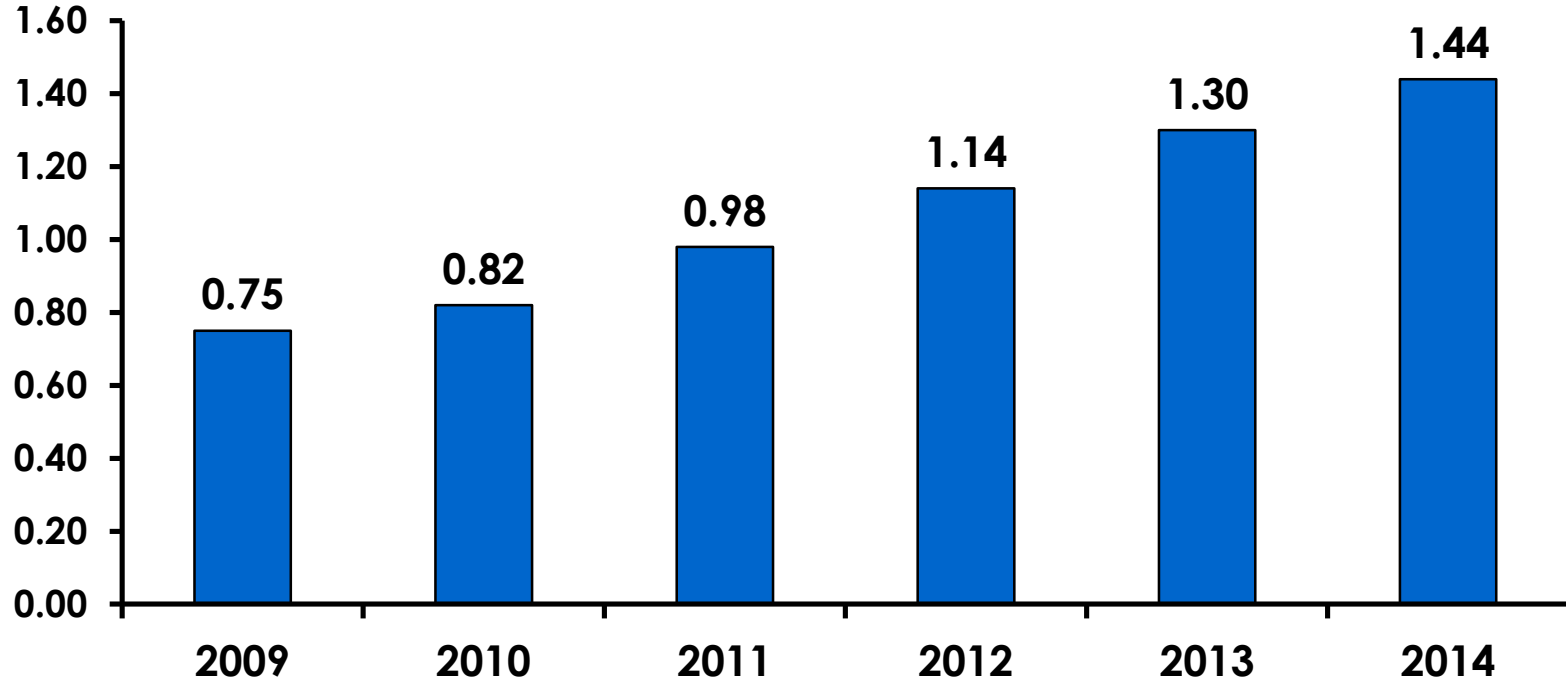
Repeat Visitors Last Trip

n = 182



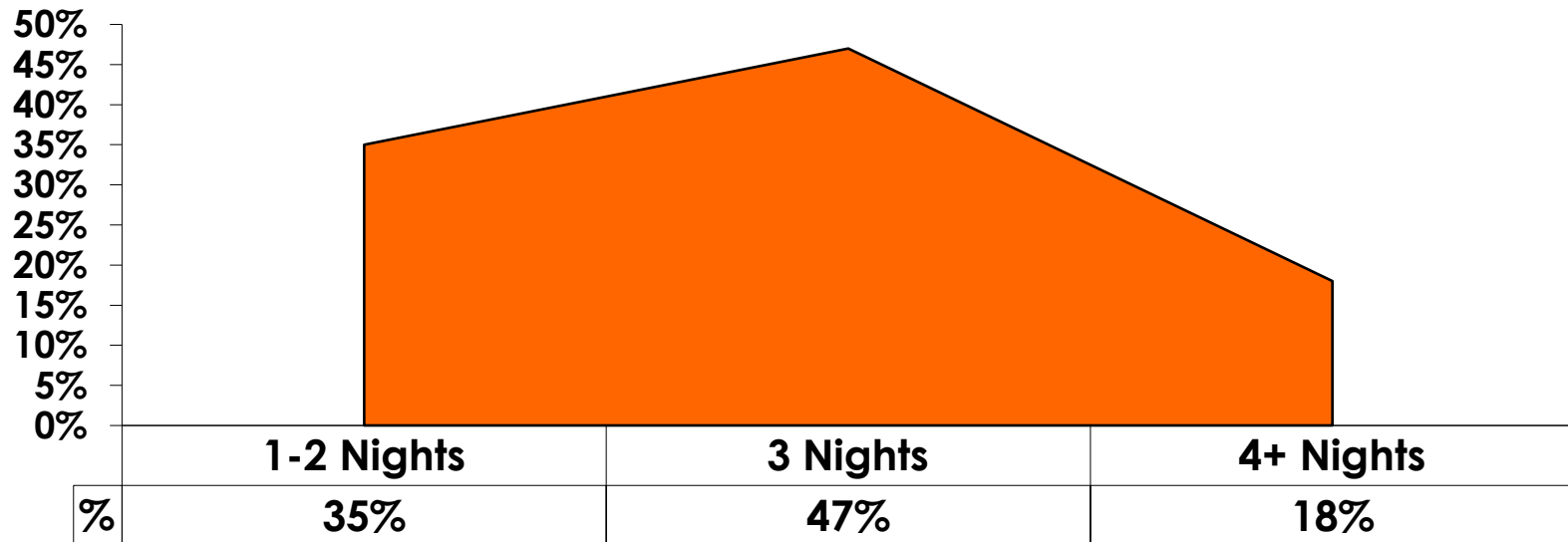
- The average repeat visitor has been to Guam 3.05 times.
- Half the repeat visitors have been to Guam within the last 2 years.

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

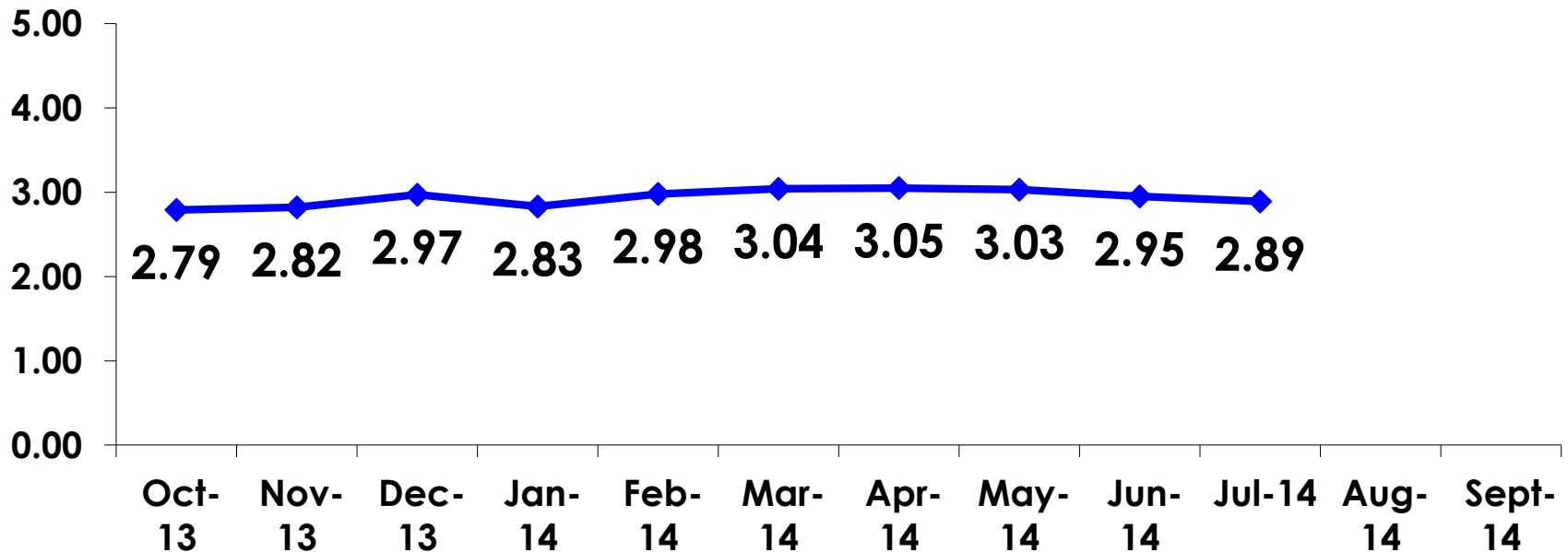


Length of Stay

Mean = 2.89 Days
Median = 3.0 Days



AVG LENGTH OF STAY

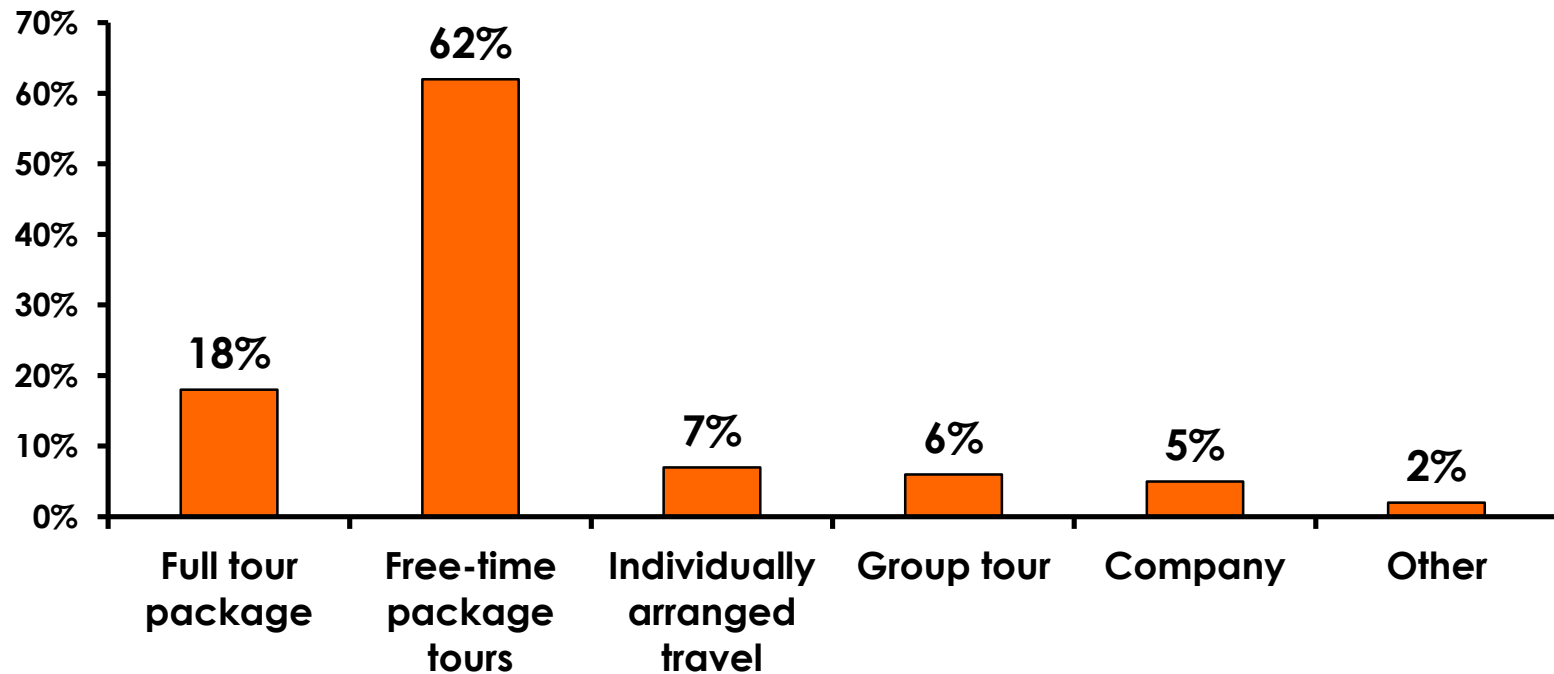


Occupation by Income

		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	
Q25	Office worker non-mgr	21%	15%	39%	31%	19%	15%	20%	14%		
	Engineer	17%	15%	10%	24%	17%	25%	9%	14%		
	Salesperson	16%	5%	10%	10%	30%	13%	16%	14%		
	Manager	7%			2%		10%	18%	22%		
	Homemaker	6%			4%	7%	11%	5%	5%		
	Other	5%		13%	2%	6%	3%	7%	3%		
	Student	5%	10%	6%		1%	3%	5%	8%	75%	
	Freeter	4%	30%		4%	5%	1%		3%		
	Self-employed	4%		3%	2%	7%	3%	5%	5%		
	Professional/ Specialist	3%	5%	3%	8%	1%	1%	2%	5%		
	Govt- office worker non-mgr	3%			8%	2%	3%	2%	3%		
	Skilled worker	2%	5%	3%	2%	2%	1%	2%			
	Govt- Manager	2%				1%	3%	5%	5%		
	Unemployed	2%	5%	3%			4%			25%	
	Executive (30+ employees)	2%		3%	2%		4%	2%			
	Teacher	1%	10%	3%				2%			
	Retired	1%		3%		1%	1%				
	Free-lancer	0%					1%				
	Total	Count	351	20	31	49	84	80	44	37	4

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

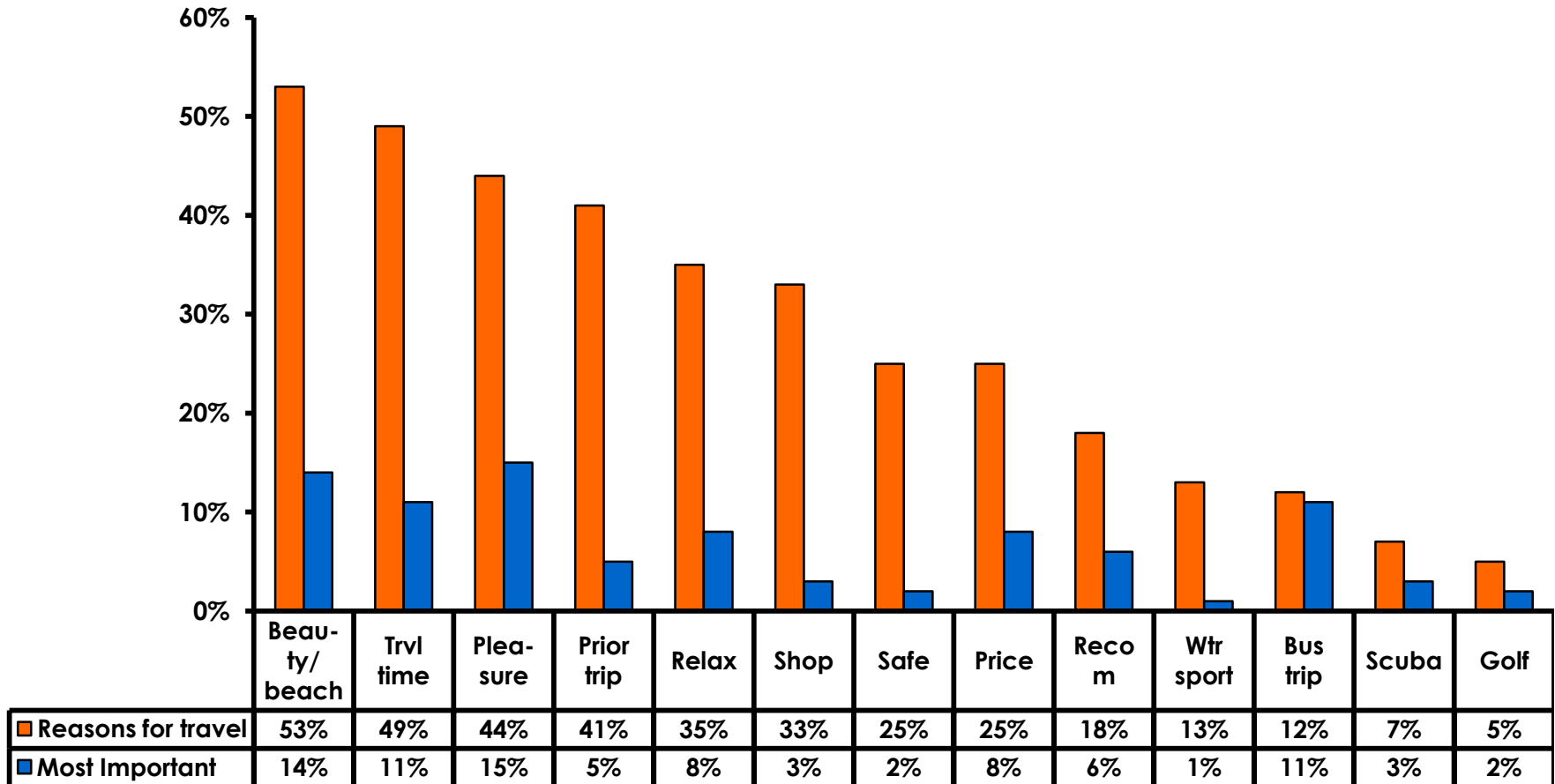


Accommodation by Income

Average length of stay: 2.89 days

		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+		
Q9	Guam Plaza Hotel	19%	5%	35%	16%	20%	16%	25%	11%	50%	
	Guam Reef & Olive Spa	10%	15%	3%	6%	11%	11%	9%	14%		
	Onward Beach Resort	10%	10%		18%	5%	16%	11%	3%		
	Grand Plaza Hotel	8%	15%	10%	4%	10%	8%	7%	11%		
	Hotel Nikko Guam	6%		6%	4%	7%	5%	7%	8%	25%	
	Outrigger Guam Resort	6%			4%	8%	6%	7%	8%		
	Royal Orchid Guam	5%	10%	13%		5%	5%		11%	25%	
	Fiesta Resort Guam	5%		10%	8%	4%	3%	9%	3%		
	Westin Resort Guam	5%	5%	6%	4%	6%	3%	5%	5%		
	Hilton Guam Resort	4%	15%	3%	6%	2%	3%	5%	3%		
	Hyatt Regency Guam	4%	15%		4%		6%	5%	5%		
	PIC Club	3%	5%	3%	4%	5%	1%		8%		
	Holiday Resort Guam	3%		3%	8%	6%	1%				
	Sheraton Laguna Guam	2%			2%	4%	3%	2%	3%		
	Leo Palace Resort	2%	5%	3%			3%	5%	3%		
	Ramada Suites Guam	2%		3%	2%	1%	3%		3%		
	Pacific Bay Hotel	2%			4%		3%	5%			
	Tumon Bay Capital Hotel	1%				2%	3%				
	Other	1%				4%	1%				
	Hotel Santa Fe	1%					1%		3%		
	Home stay/ friend/ relative	1%			2%	1%					
	Condo	0%					1%				
	Oceanview Hotel	0%			2%						
	Total	Count	351	20	31	49	84	80	44	37	4

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Pleasure,
- Guam's natural beauty/ beaches 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	53%	73%	50%	45%	53%	45%	61%	
	Short travel time	49%	57%	46%	50%	49%	48%	51%	
	Pleasure	44%	60%	43%	36%	45%	39%	50%	
	Previous trip	41%	32%	32%	52%	57%	39%	43%	
	Relax	35%	48%	29%	37%	36%	32%	38%	
	Shopping	33%	52%	31%	28%	26%	20%	46%	
	Safe	25%	22%	19%	31%	34%	27%	22%	
	Price	25%	35%	22%	24%	19%	21%	29%	
	Recomm- friend/family/trvl agnt	18%	23%	16%	12%	26%	14%	22%	
	Water sports	13%	18%	11%	9%	21%	13%	13%	
	Company/ Business Trip	12%	8%	14%	13%	9%	13%	11%	
	Scuba	7%	5%	9%	5%	4%	2%	11%	
	Other	5%	3%	4%	6%	9%	6%	4%	
	Golf	5%		2%	6%	17%	9%	1%	
	Married/ Attn wedding	5%	3%	7%	1%	4%	9%	1%	
	Honeymoon	4%	2%	6%	4%		6%	2%	
	Organized sports	1%	2%	2%	1%		1%	2%	
	Visit friends/ Relatives	1%	2%	1%	2%	2%	1%	2%	
	Company Sponsored	1%		1%	1%		1%	1%	
	Career Cert/ Testing	0%	2%					1%	
	Total	Count	350	60	147	94	47	176	174

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	53%	45%	48%	49%	60%	50%	52%	57%	75%	
	Short travel time	49%	35%	29%	43%	47%	51%	55%	76%	75%	
	Pleasure	44%	40%	45%	41%	52%	40%	45%	41%	50%	
	Previous trip	41%	40%	23%	33%	51%	38%	39%	57%	25%	
	Relax	35%	35%	29%	33%	36%	33%	30%	51%	25%	
	Shopping	33%	25%	39%	31%	35%	28%	34%	41%	75%	
	Safe	25%	20%	19%	18%	27%	28%	30%	24%	50%	
	Price	25%	10%	23%	31%	23%	24%	27%	30%	25%	
	Recomm- friend/family/trvl agnt	18%	35%	16%	22%	19%	8%	23%	16%	25%	
	Water sports	13%	5%	16%	22%	14%	13%	9%	8%		
	Company/ Business Trip	12%	5%	19%	18%	10%	18%	2%	8%		
	Scuba	7%	5%	6%	4%	10%	9%	2%	5%		
	Other	5%	5%	6%	6%	2%	8%	7%	3%		
	Golf	5%	10%		2%	1%	8%	14%	3%		
	Married/ Attn wedding	5%		3%		6%	5%	5%	8%	25%	
	Honeymoon	4%	10%	3%	6%	2%	4%	5%	3%		
	Organized sports	1%			4%	2%		2%			
	Visit friends/ Relatives	1%		3%	4%			5%			
	Company Sponsored	1%				1%	1%				
	Career Cert/ Testing	0%			2%						
	Total	Count	350	20	31	49	83	80	44	37	4

SECTION 3 **EXPENDITURES**

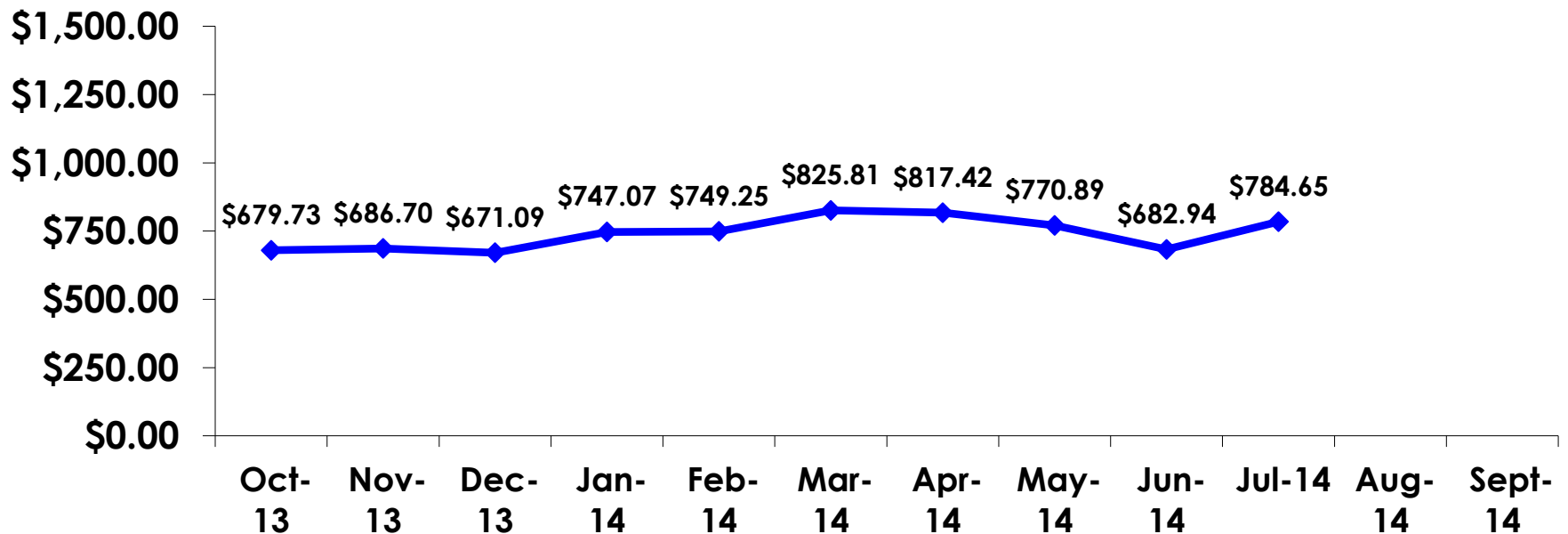
Prepaid Expenditures

¥101.64/US\$1

- \$1,517.73 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$29,516 = maximum (highest amount recorded for the entire sample)
- \$784.65 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$741.54

Breakdown of Prepaid Expenditures

¥101.64=\$1

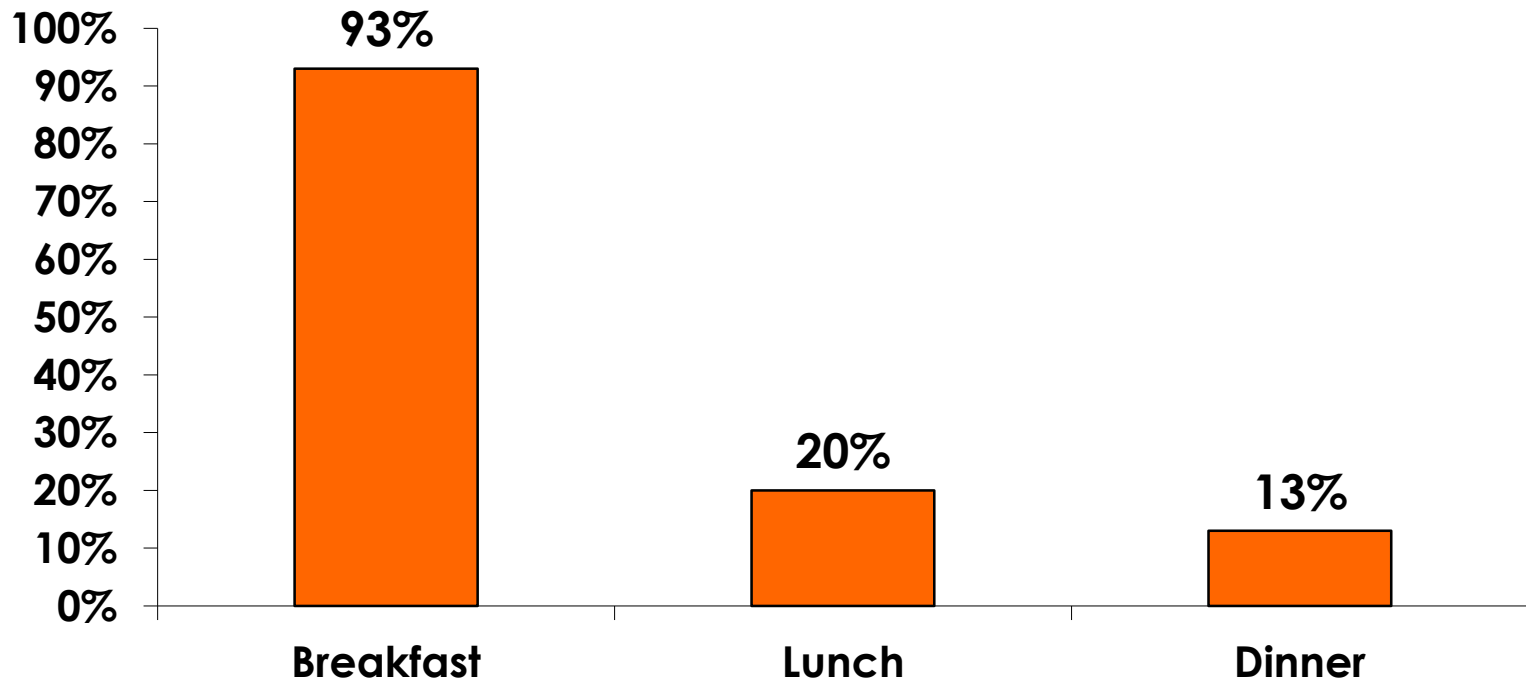
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,399.50
Air & Accommodation w/ daily meal package	\$3,413.71
Air only	\$1,559.71
Accommodation only	\$540.03
Accommodation w/ daily meal only	\$1,377.41
Food & Beverages in Hotel	\$129.66
Ground transportation – Japan	\$63.84
Ground transportation – Guam	\$45.47
Optional tours/ activities	\$203.41
Other expenses	\$853.93
Total Prepaid	\$1,517.73

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=30

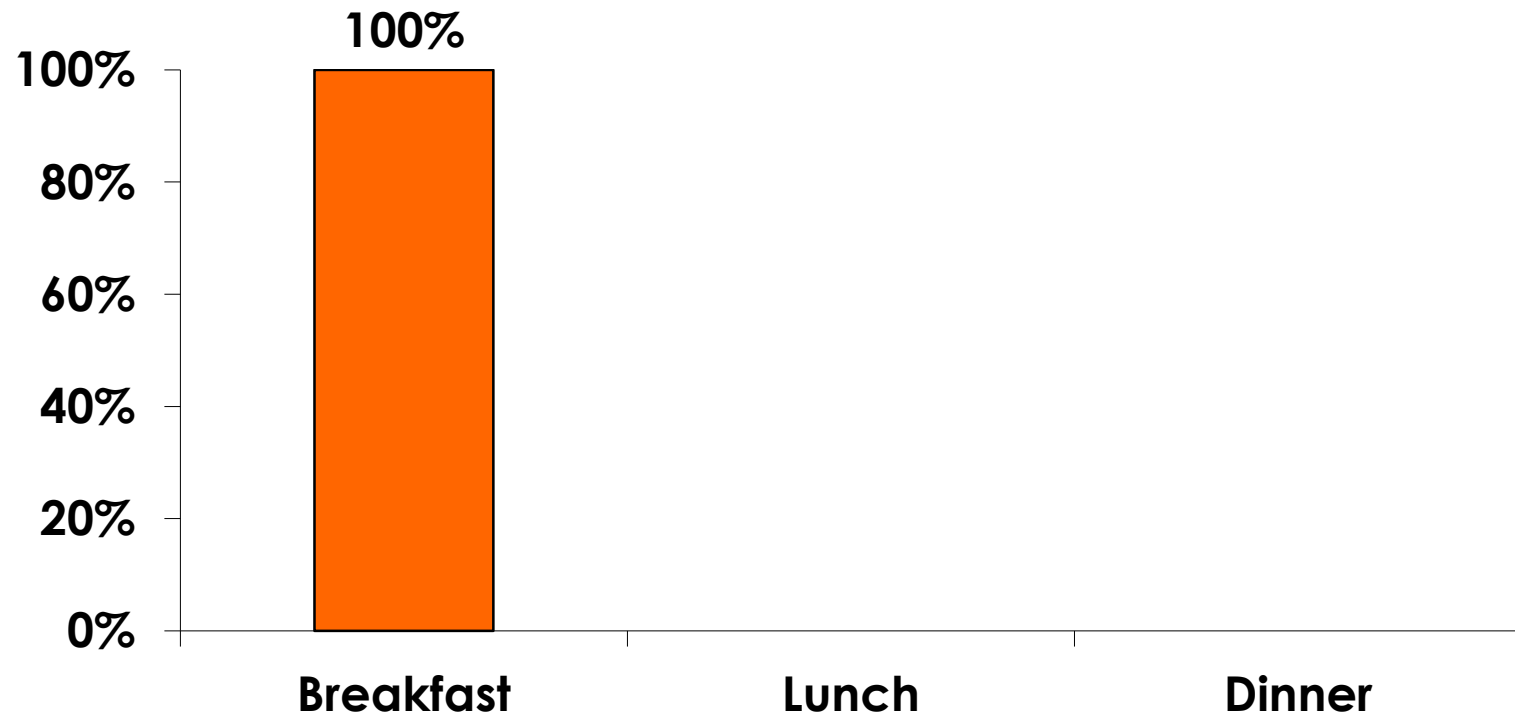


Mean=\$3,413.71 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

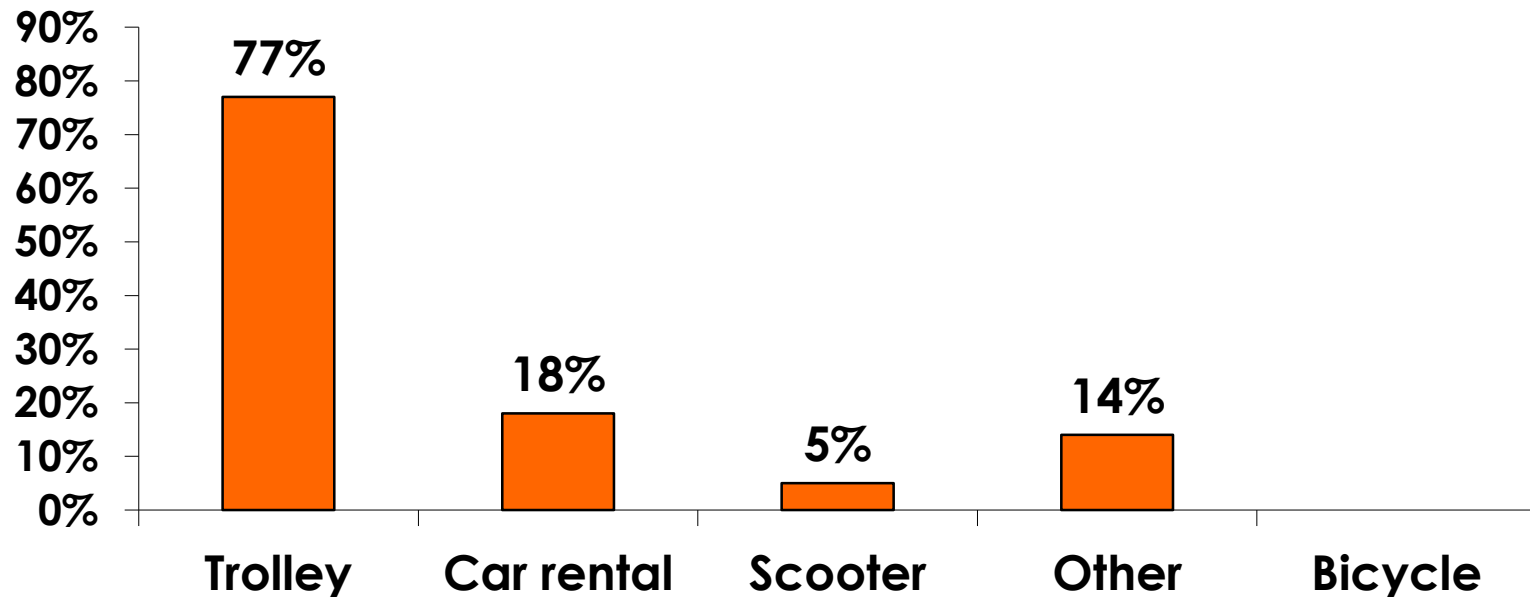
N=4



Mean=\$1,377.41 per travel party

PREPAID GROUND TRANSPORTATION

n=22



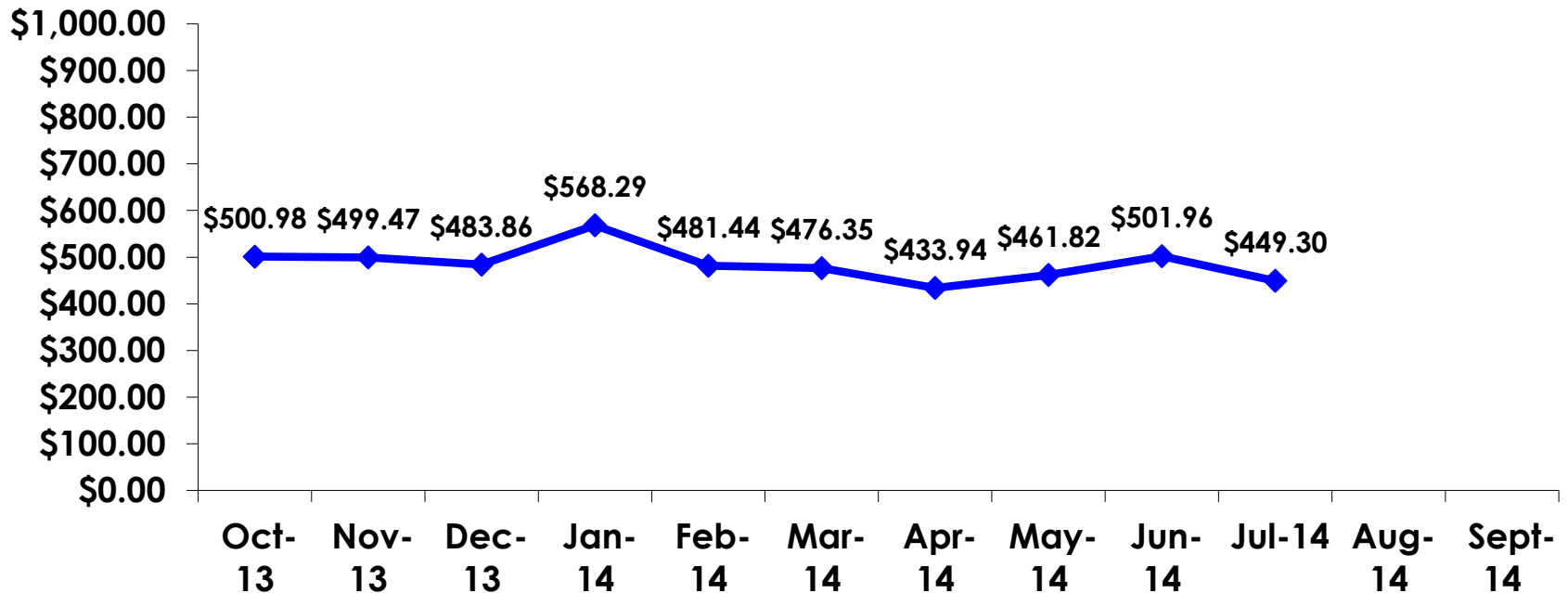
Mean=\$45.47 per travel party

On-Island Expenditures

- \$724.75 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,500 = Maximum (highest amount recorded for the entire sample)
- \$449.30 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

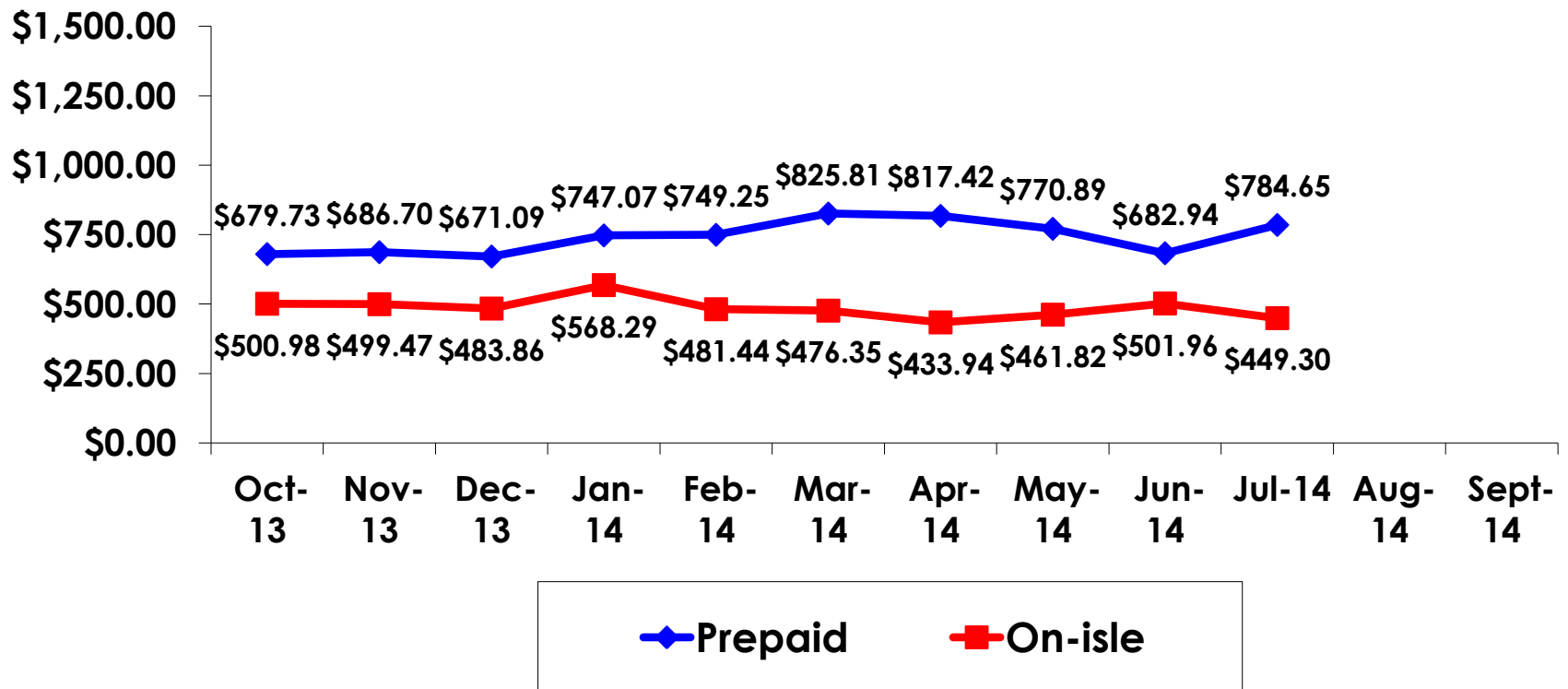


YTD = \$485.75

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$741.54

On-Isle YTD = \$485.75



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	\$449.30	\$419.57	\$479.71	\$393.83	\$429.70	\$413.39	\$424.57	\$530.75	\$473.06	\$427.97	\$473.93
	Median	\$400	\$350	\$450	\$310	\$400	\$300	\$455	\$500	\$477	\$300	\$470
	Minimum	\$0	\$0	\$0	\$150	\$0	\$0	\$0	\$50	\$0	\$0	\$200
	Maximum	\$2,500	\$2,000	\$2,500	\$900	\$2,000	\$1,500	\$1,400	\$2,500	\$1,800	\$1,500	\$770

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$43.25	\$66.81	\$19.29	\$8.55	\$27.18	\$77.68	\$69.00
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.19	\$38.81	\$19.41	\$23.33	\$25.57	\$35.76	\$36.19
	Median	\$8	\$20	\$0	\$0	\$2	\$10	\$20
F&B RESTRNT	Mean	\$100.70	\$128.45	\$72.46	\$63.27	\$97.11	\$130.00	\$103.94
	Median	\$53	\$100	\$40	\$35	\$50	\$100	\$60
OPT TOUR	Mean	\$81.40	\$109.12	\$53.20	\$54.58	\$73.55	\$100.27	\$96.49
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$188.57	\$191.11	\$185.98	\$131.40	\$182.82	\$216.43	\$221.77
	Median	\$50	\$20	\$100	\$100	\$50	\$50	\$40
GIFT- OTHER	Mean	\$123.06	\$133.18	\$112.76	\$98.55	\$111.66	\$140.80	\$158.94
	Median	\$80	\$70	\$100	\$50	\$70	\$100	\$100
TRANS	Mean	\$25.30	\$39.64	\$10.71	\$14.27	\$15.12	\$50.85	\$21.40
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$134.42	\$159.52	\$108.88	\$144.20	\$121.20	\$173.81	\$90.47
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$724.75	\$865.06	\$582.02	\$542.38	\$654.55	\$921.01	\$792.45
	Median	\$500	\$600	\$500	\$500	\$500	\$577	\$530

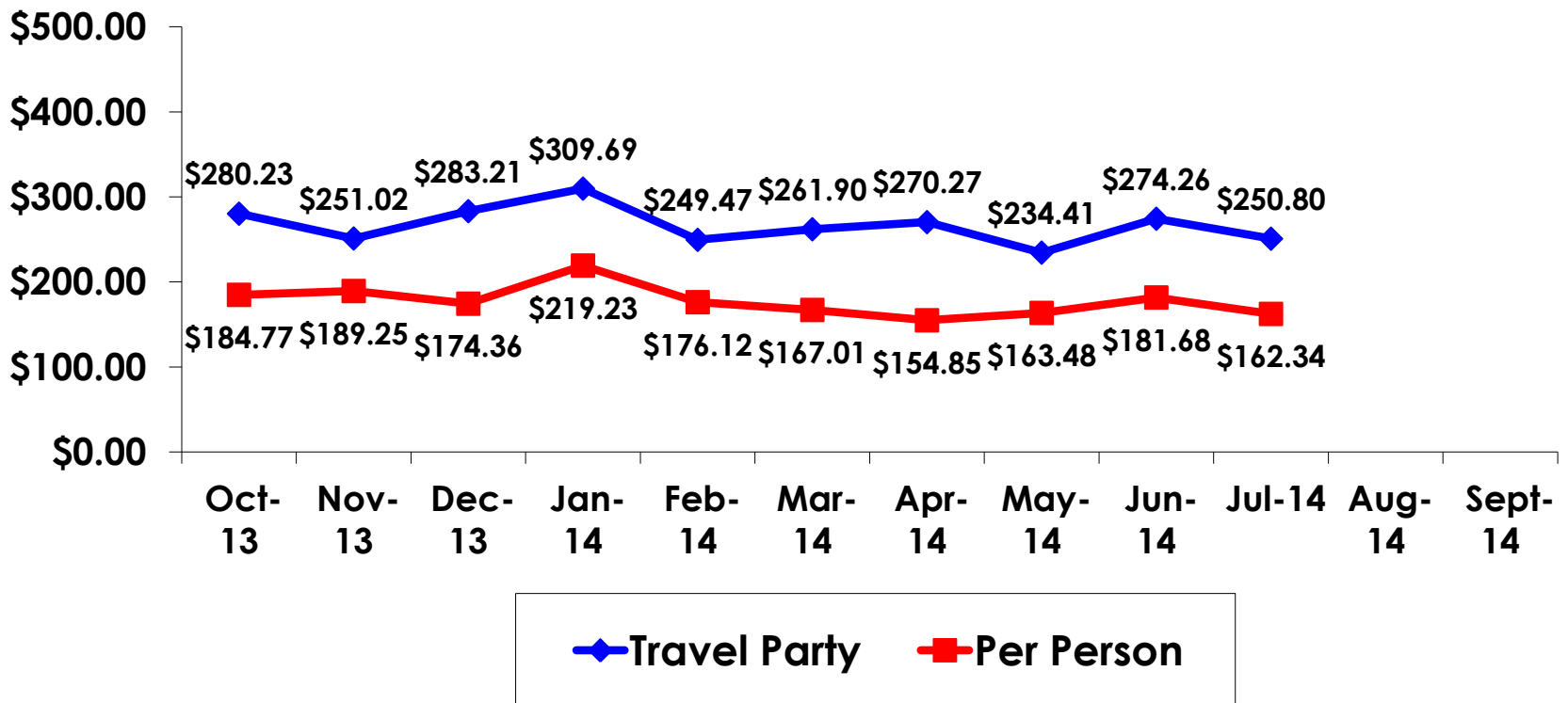
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$43.25	\$44.83	\$41.88
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$29.19	\$27.90	\$30.31
	Median	\$8	\$0	\$10
F&B RESTRNT	Mean	\$100.70	\$90.95	\$109.14
	Median	\$53	\$50	\$60
OPT TOUR	Mean	\$81.40	\$76.08	\$86.01
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$188.57	\$181.08	\$195.06
	Median	\$50	\$50	\$50
GIFT- OTHER	Mean	\$123.06	\$112.96	\$131.81
	Median	\$80	\$100	\$70
TRANS	Mean	\$25.30	\$15.82	\$33.52
	Median	\$0	\$0	\$0
OTHER	Mean	\$134.42	\$144.02	\$126.09
	Median	\$0	\$0	\$0
TOTAL	Mean	\$724.75	\$691.25	\$753.80
	Median	\$500	\$500	\$510

ON-ISLE EXPENDITURES – Per Day

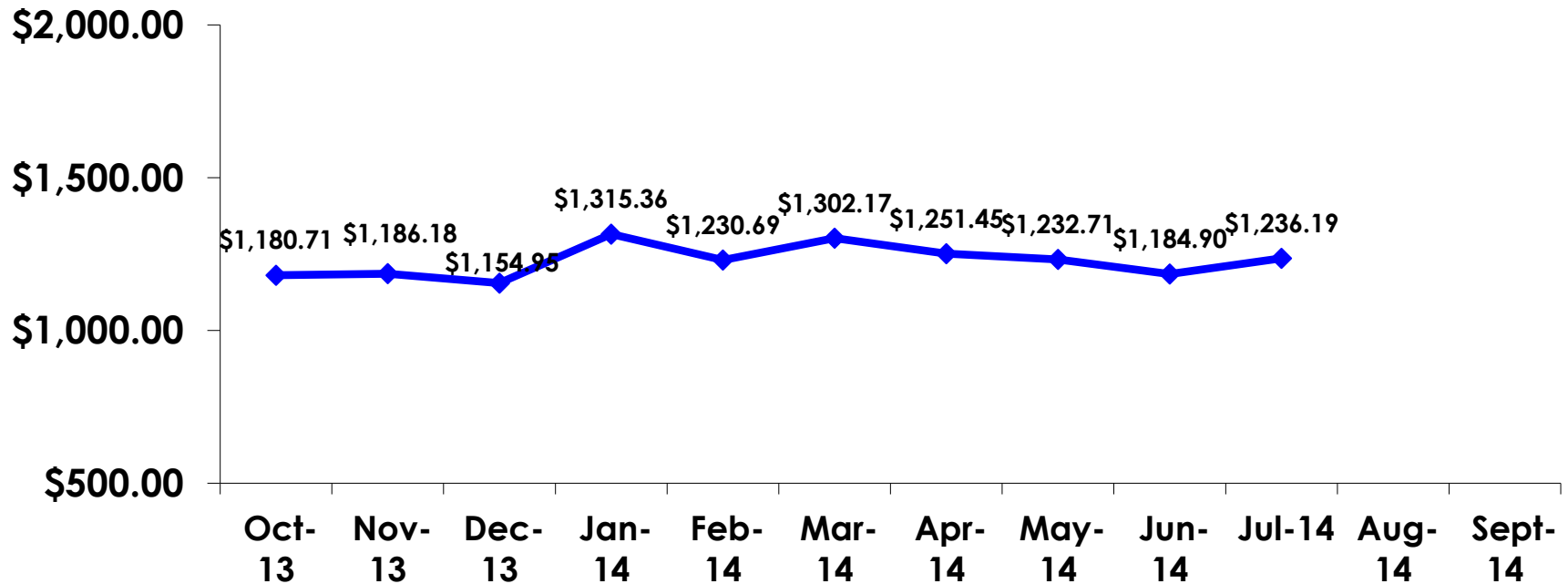
Travel Party YTD = \$266.51 Per Person YTD = \$177.29



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,236.19 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$15,008 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



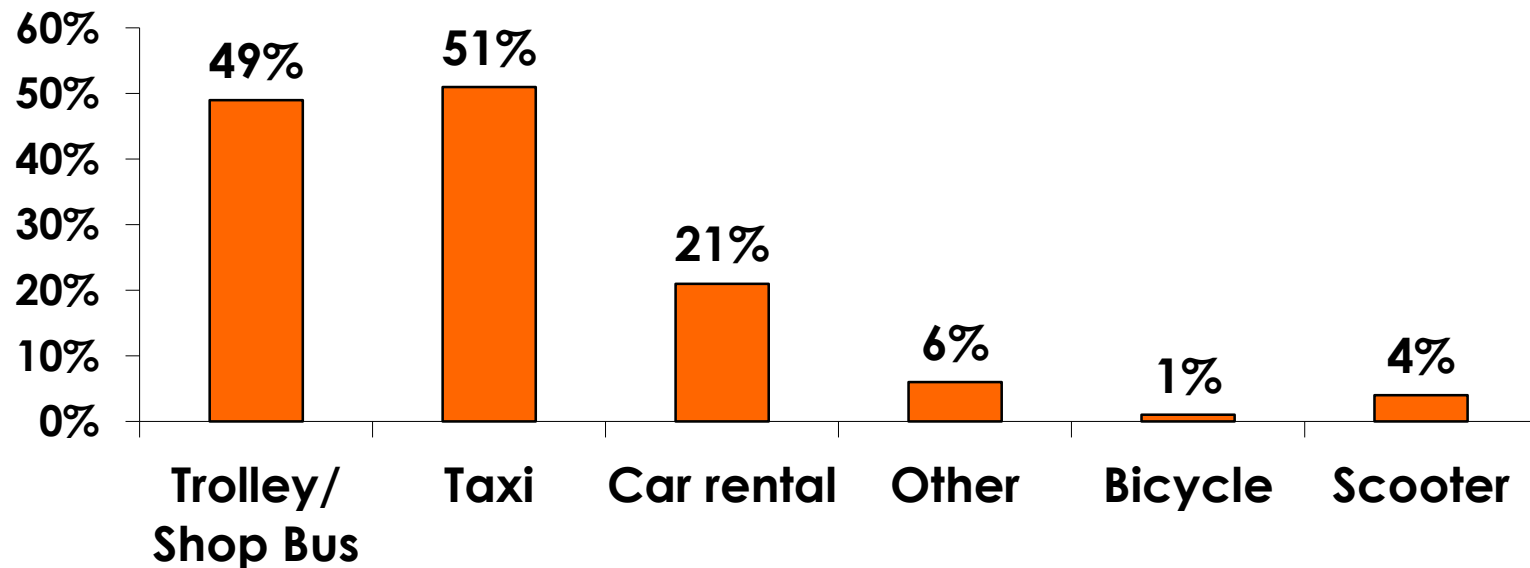
YTD=\$1,227.52

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$43.25
Food & beverage in fast food restaurant/convenience store	\$29.19
Food & beverage at restaurants or drinking establishments outside a hotel	\$100.70
Optional tours and activities	\$81.40
Gifts/ souvenirs for yourself/companions	\$188.57
Gifts/ souvenirs for friends/family at home	\$123.06
Local transportation	\$25.30
Other expenses not covered	\$134.42
Average Total	\$724.75

Local Transportation

n=70



Mean=\$25.30 per travel party

Guam Airport Expenditures

- \$30.11 = 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

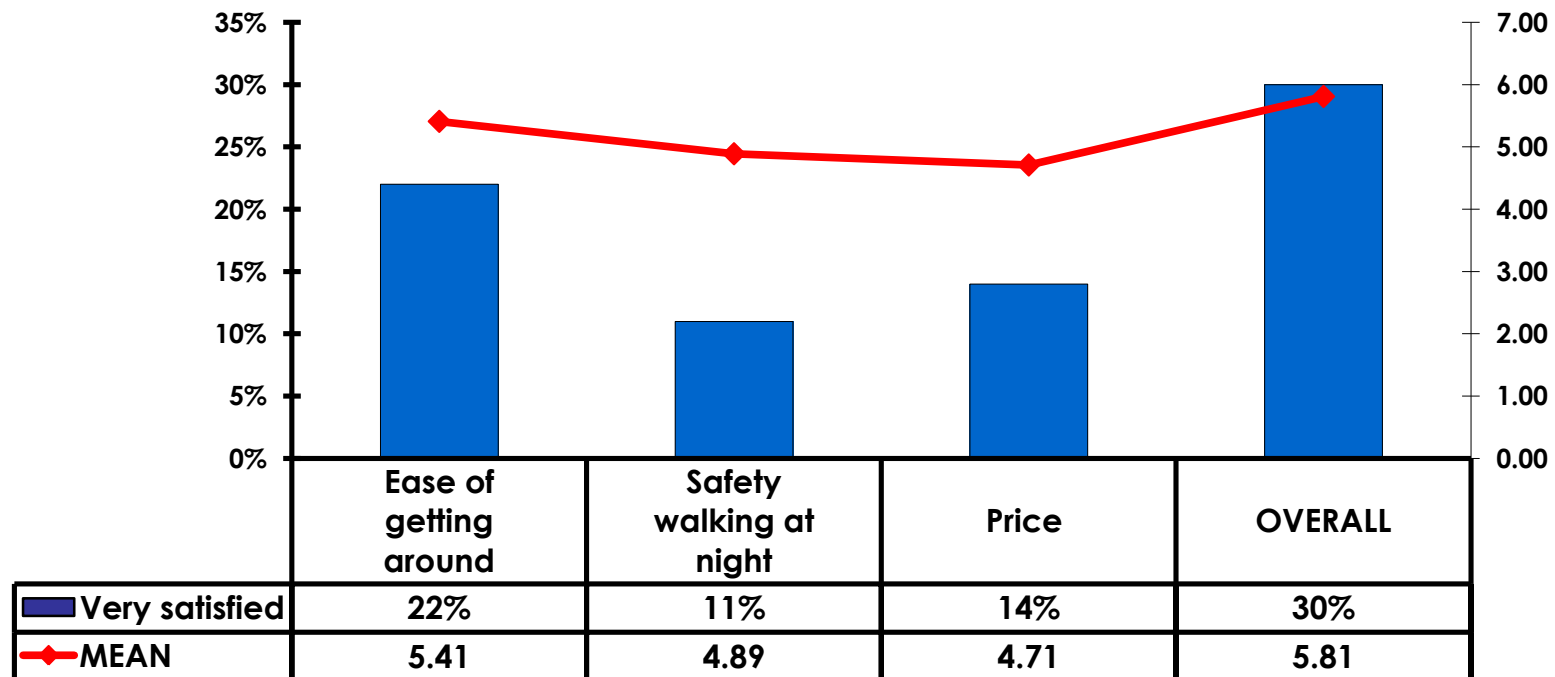
	MEAN \$
Food & Beverages	\$8.50
Gifts/Souvenirs Self	\$13.01
Gifts/Souvenirs Others	\$8.58
Total	\$30.11

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

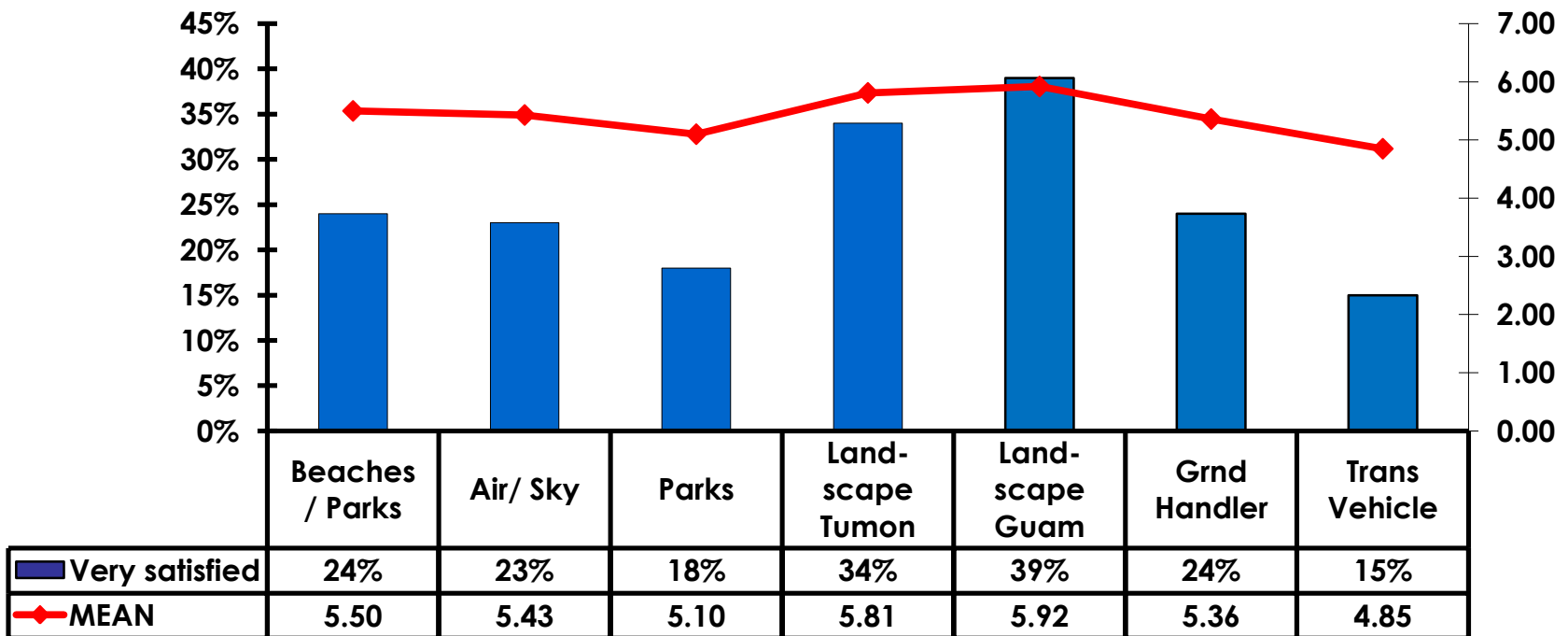
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

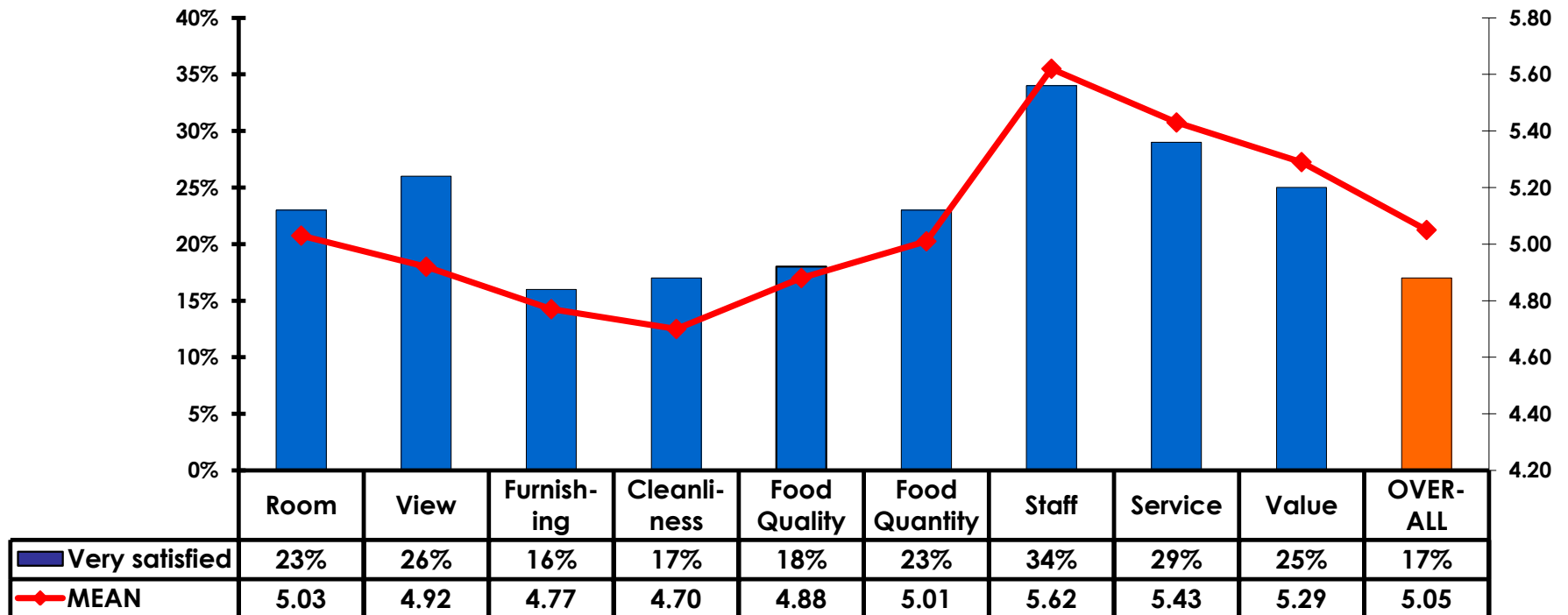
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

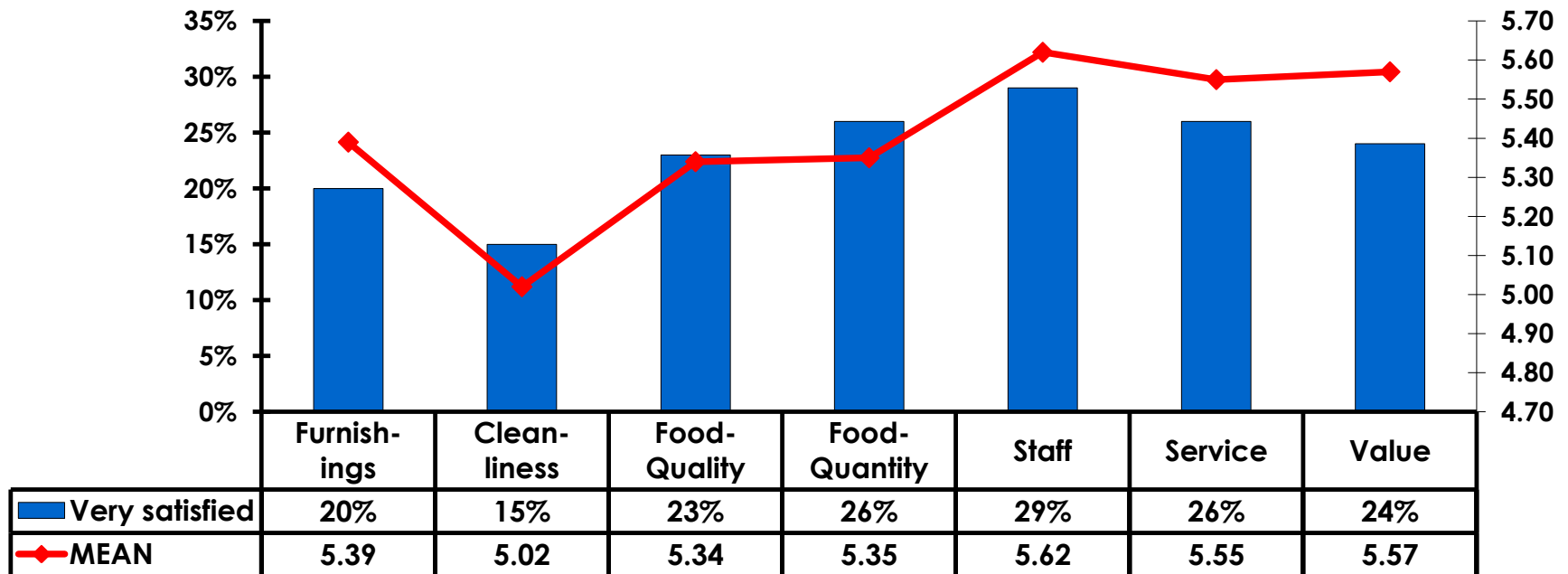
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

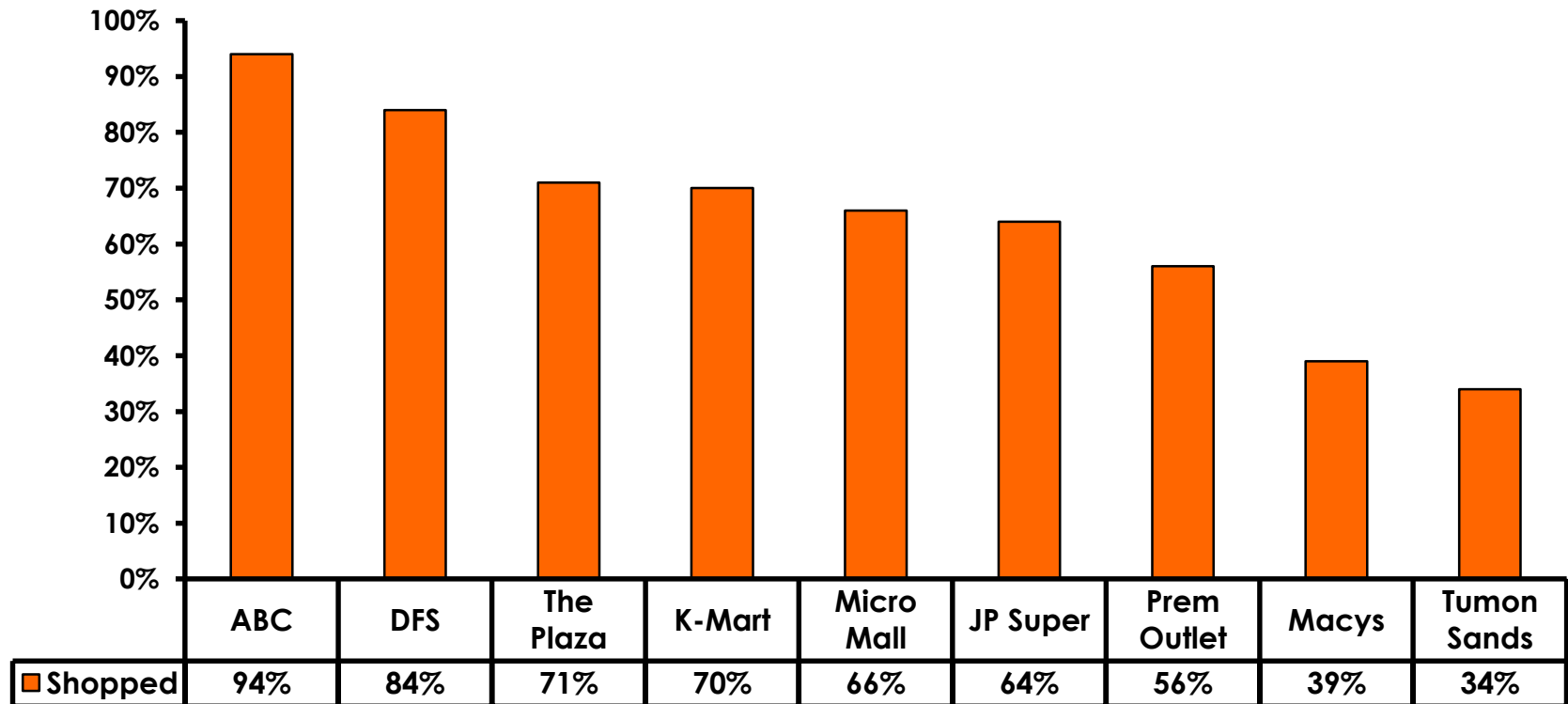
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

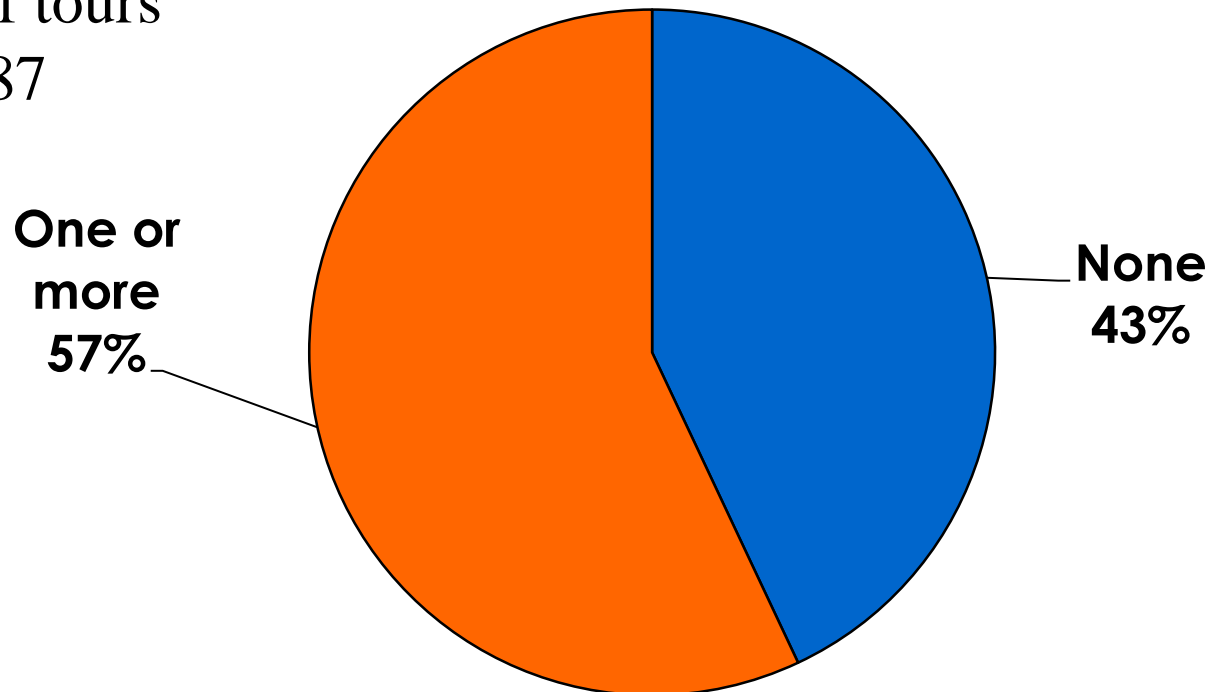
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

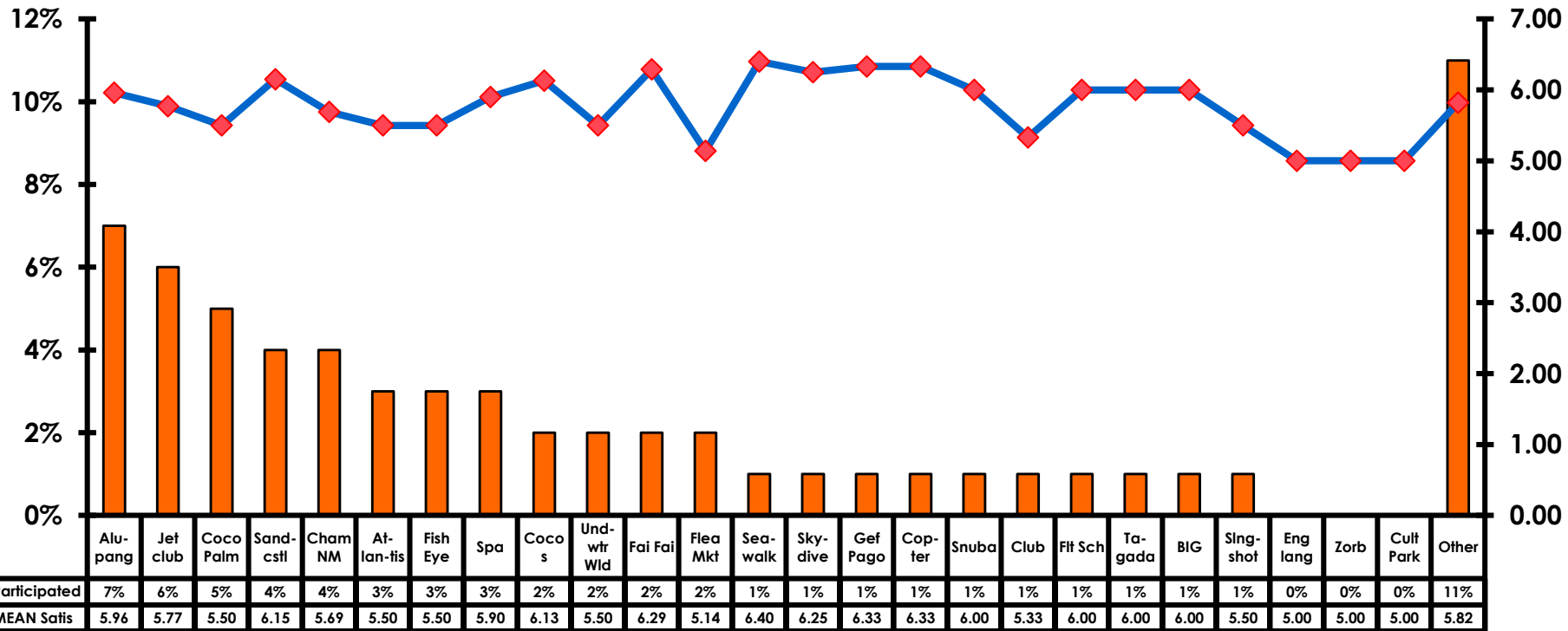
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 52%
Score of 4 to 5 = 44%	Score of 4 to 5 = 51%
Score 1 to 3 = 3%	Score 1 to 3 = 6%
MEAN = 5.42	MEAN = 5.34

Optional Tour Participation

- Average number of tours participated in is .87



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 = 47%	Score of 6 to 7 = 47%
Score of 4 to 5 = 51%	Score of 4 to 5 = 52%
Score 1 to 3 = 3%	Score 1 to 3 = 1%
MEAN = 5.24	MEAN = 5.21

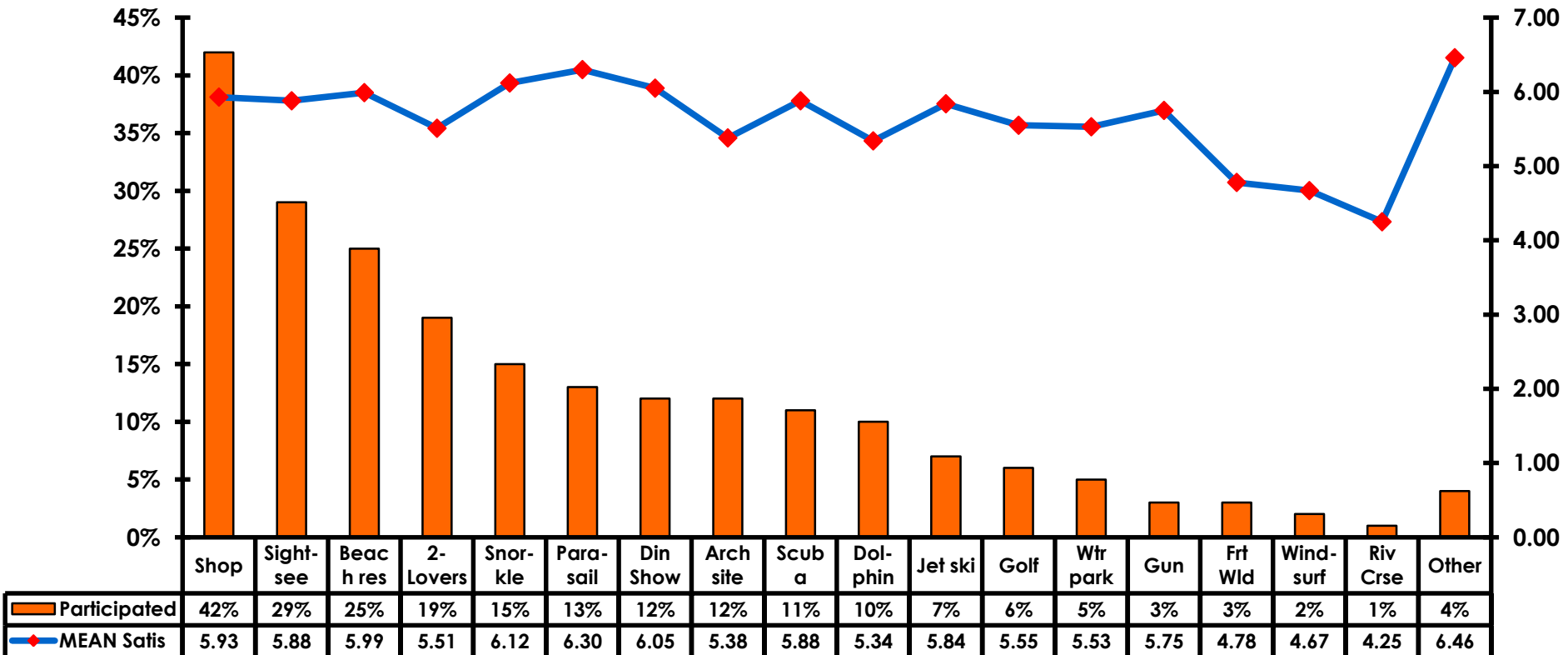
Night Tours Satisfaction

7pt Rating Scale

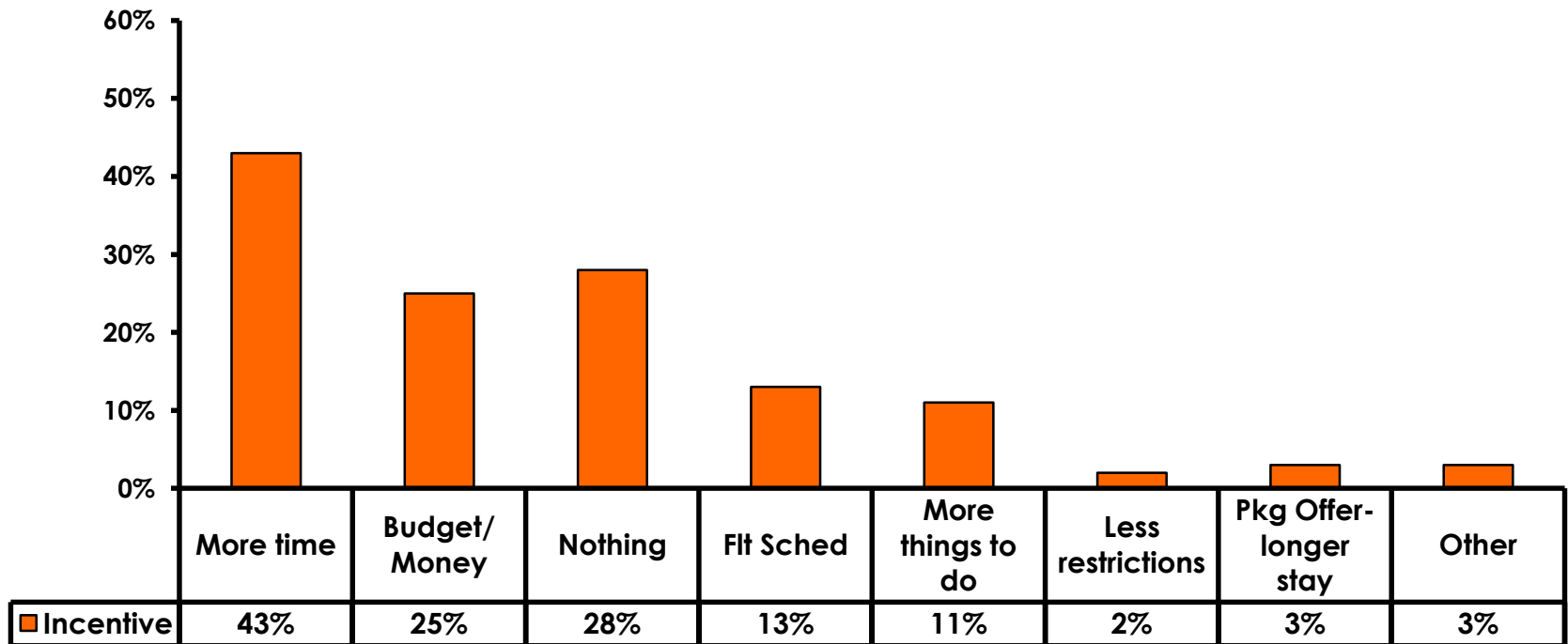
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 24%	Score of 6 to 7 = 26%
Score of 4 to 5 = 72%	Score of 4 to 5 = 70%
Score 1 to 3 = 2%	Score 1 to 3 = 3%
MEAN = 4.66	MEAN = 4.70

Satisfaction with Other Activities



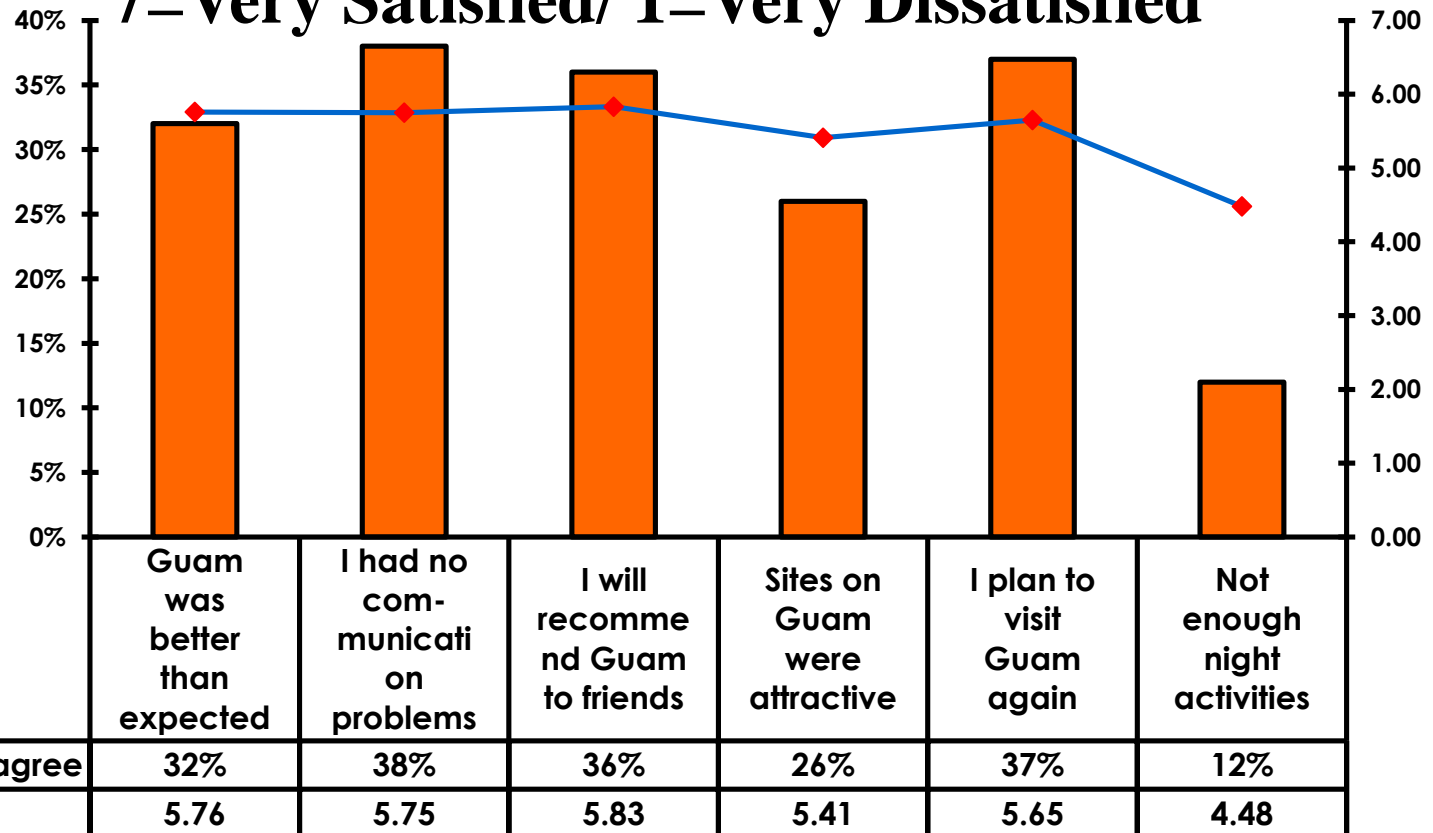
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

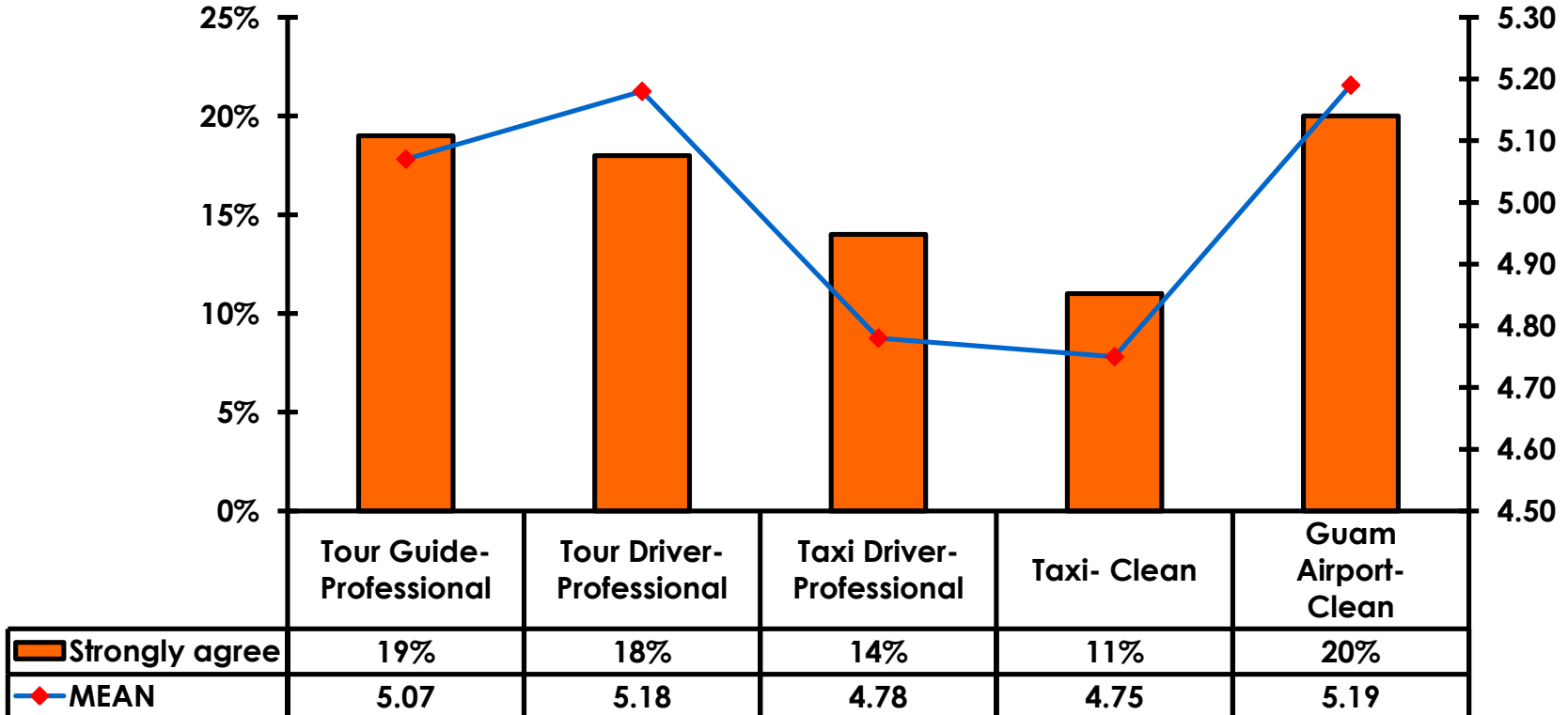
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

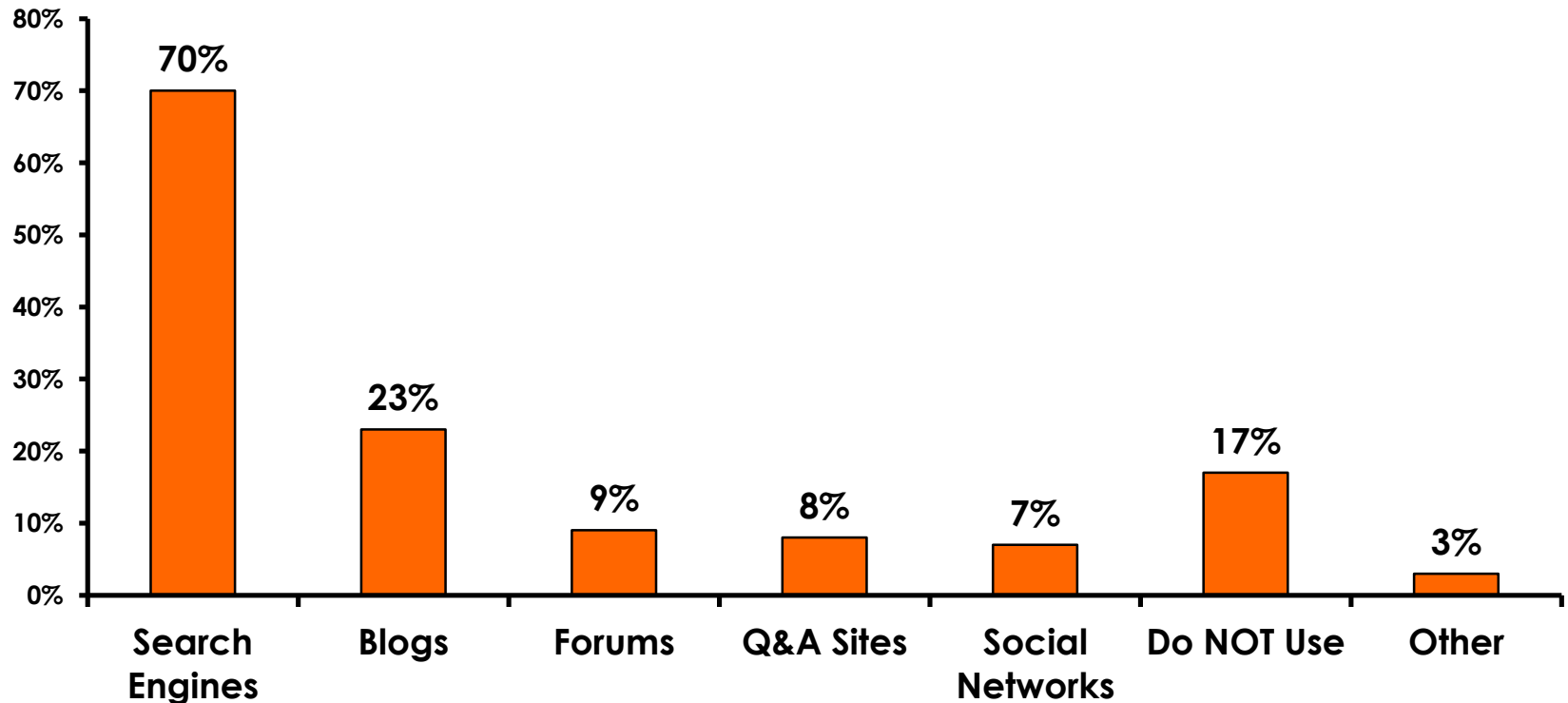
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



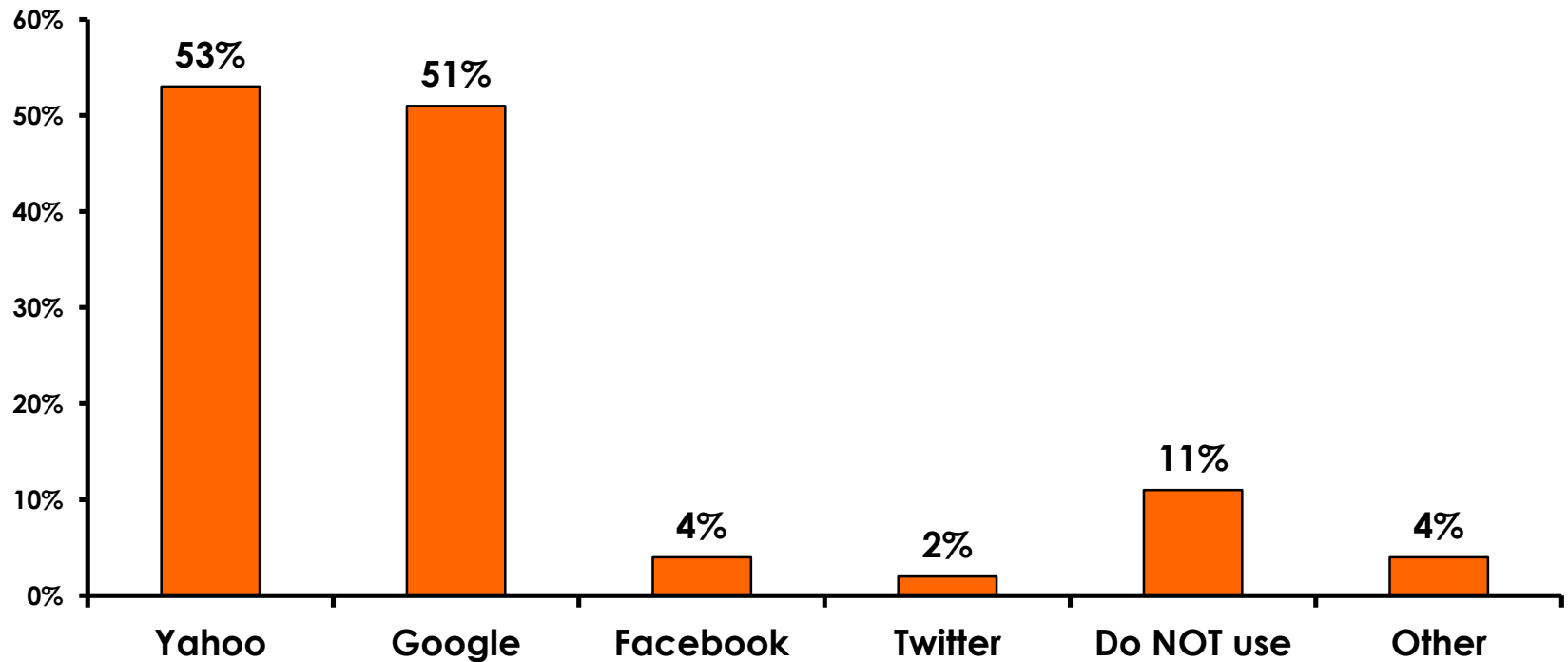
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

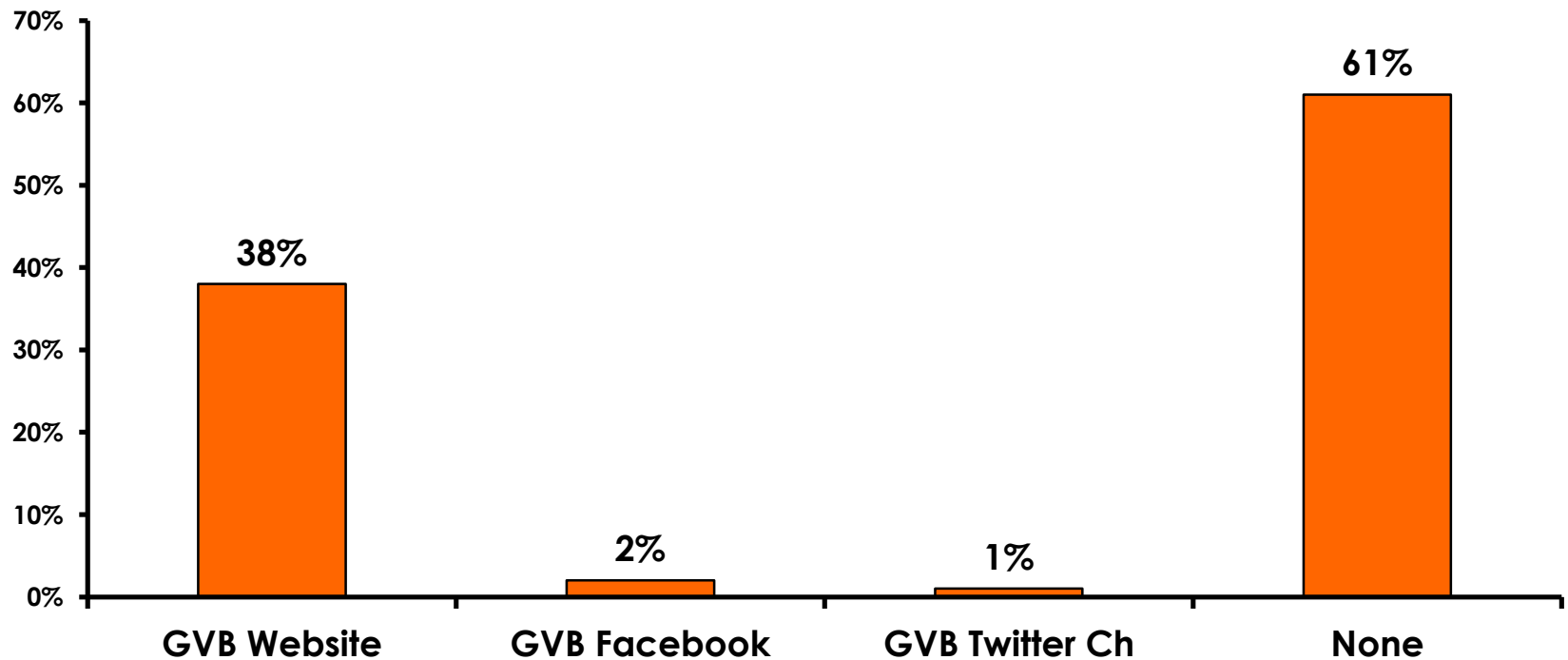


Internet- Things To Do

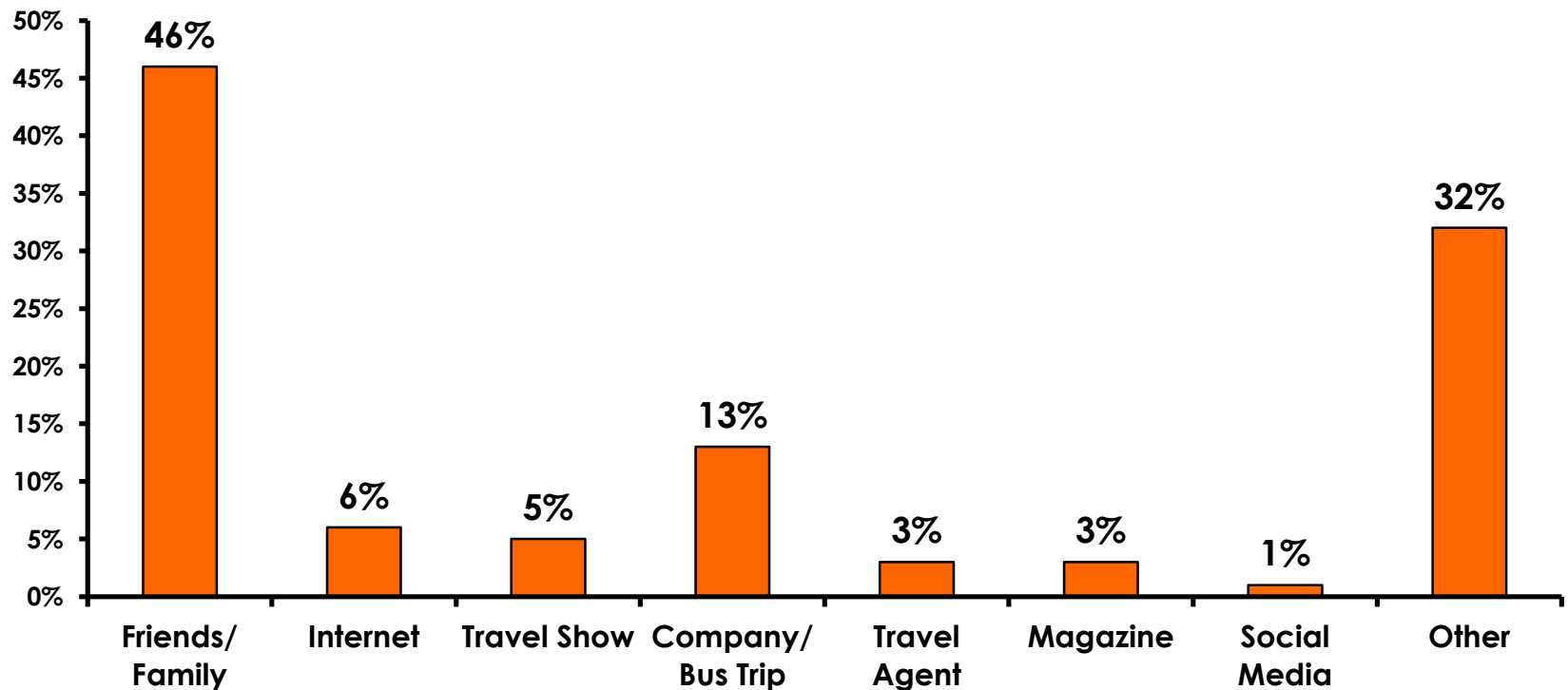
Sources of Info



Internet- GVB Sources

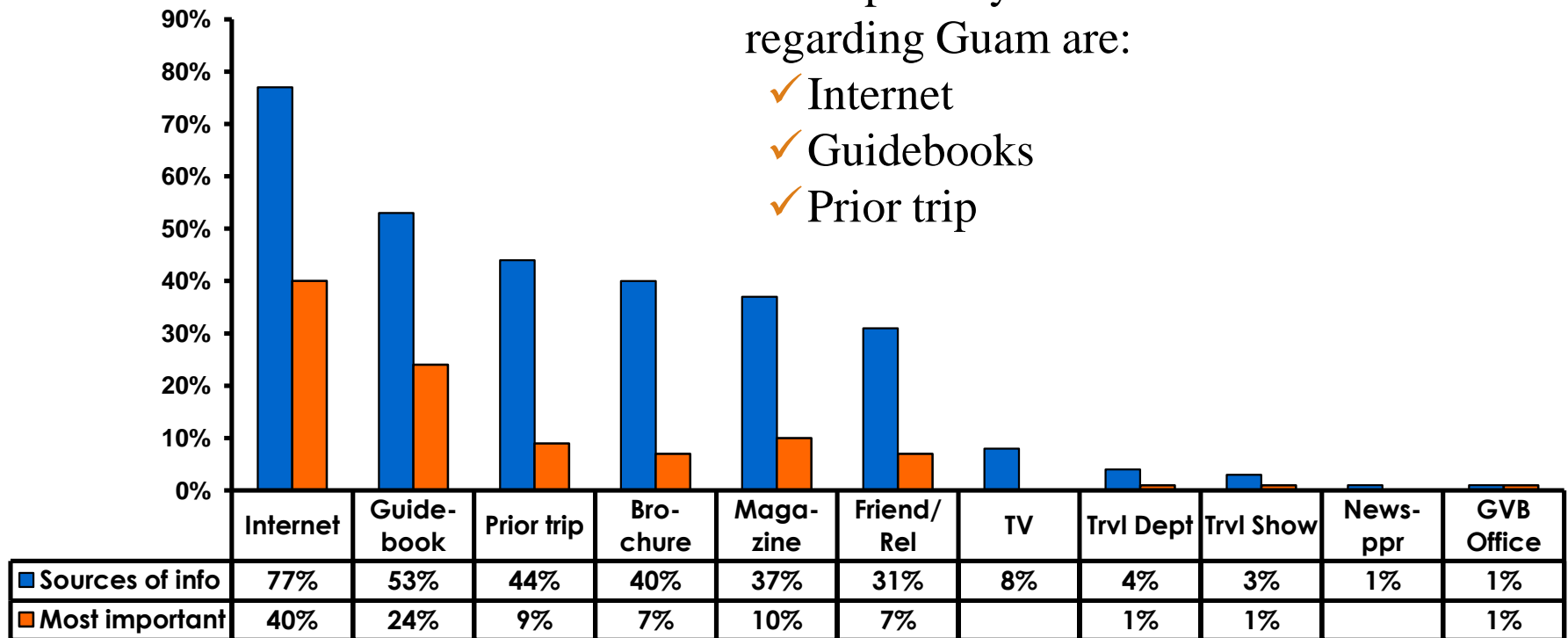


Travel Motivation- Info Sources



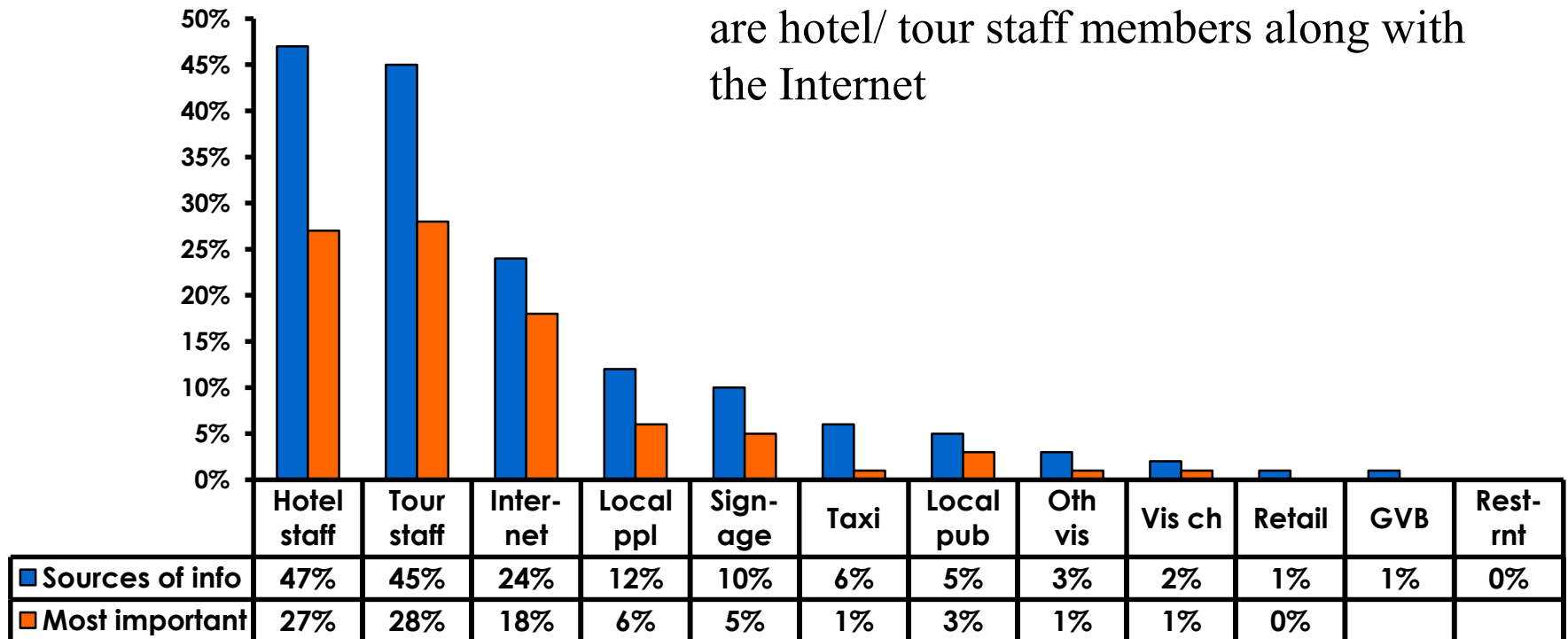
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

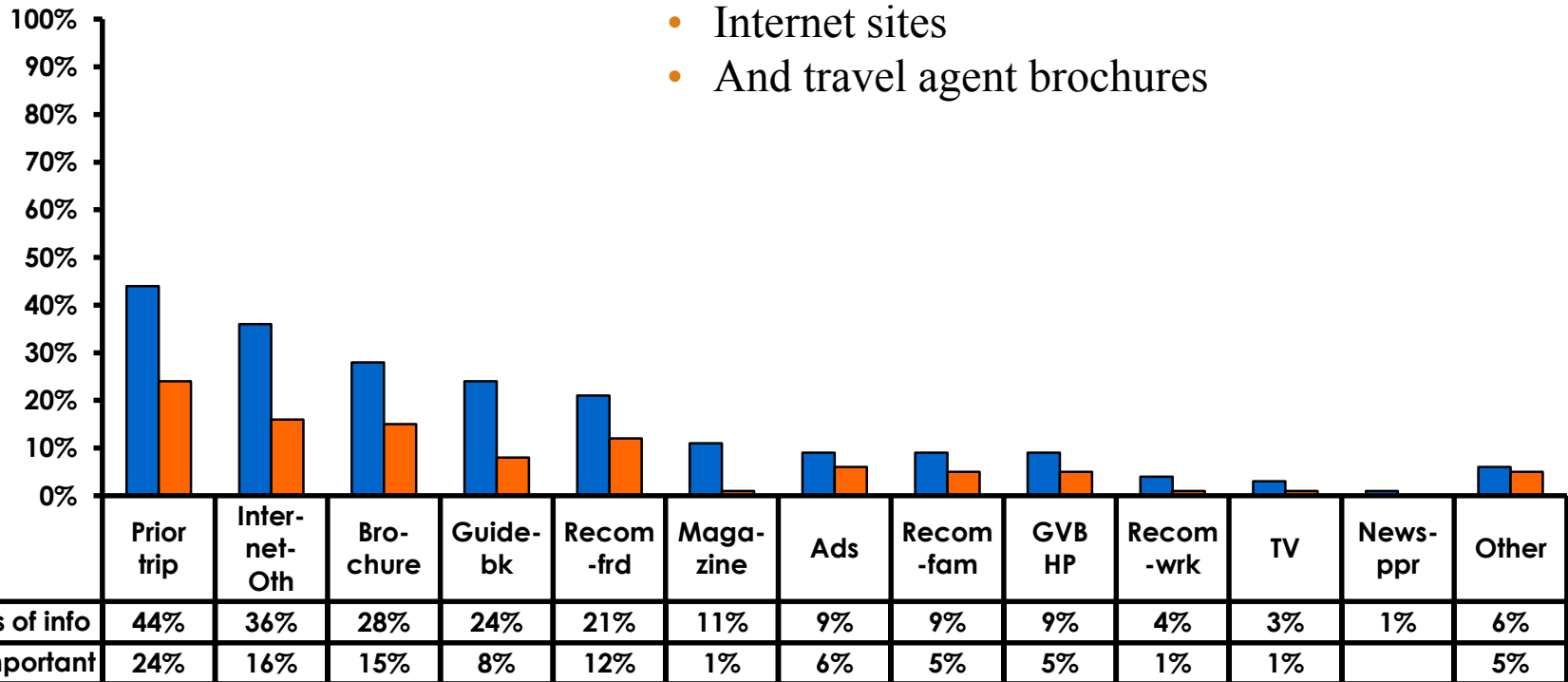
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

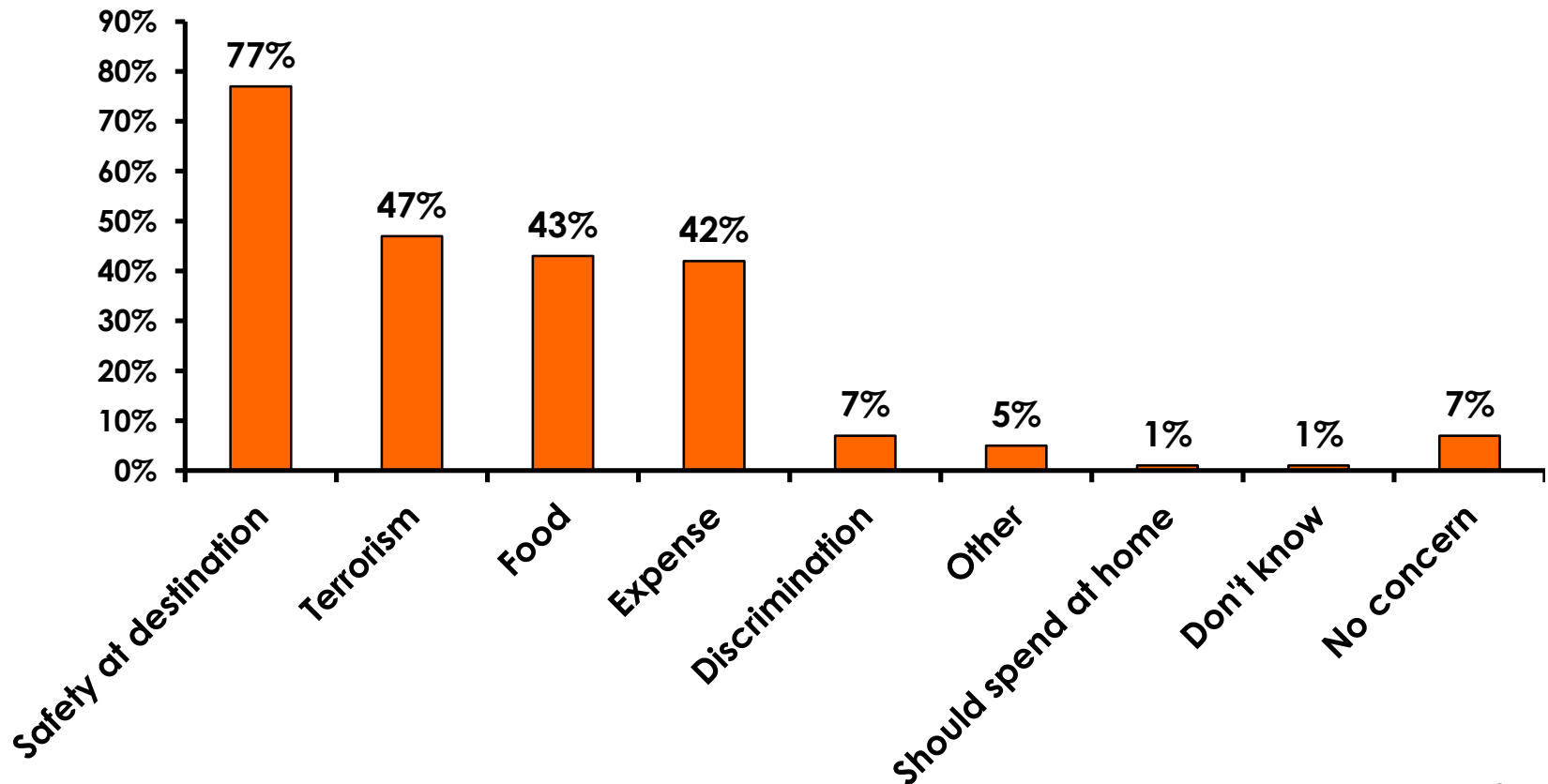
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

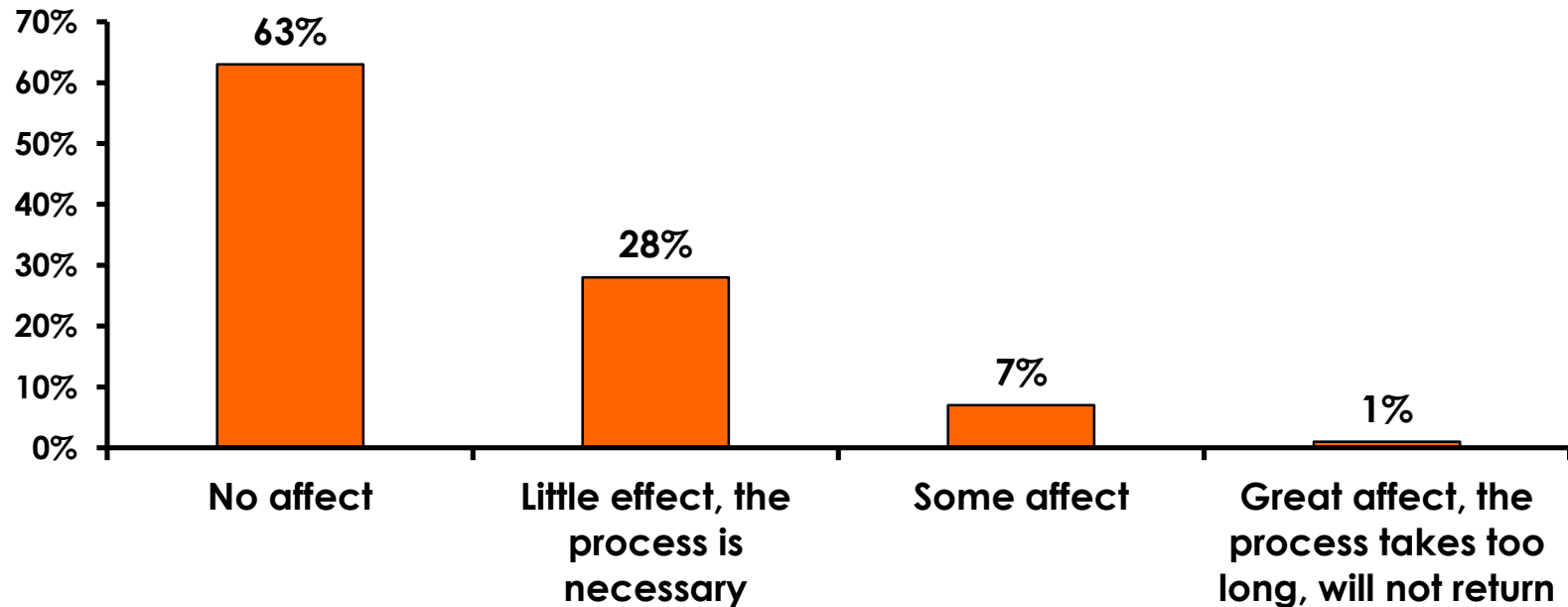
Concerns about travel outside of Japan - Overall



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	77%	78%	79%	70%	79%	80%	74%	80%	73%	76%	80%	78%	100%	
	Terrorism	47%	40%	51%	44%	47%	40%	48%	55%	46%	54%	30%	49%	25%	
	Food	43%	53%	44%	37%	36%	30%	58%	43%	42%	43%	48%	35%	75%	
	Expense	42%	57%	42%	36%	34%	35%	55%	49%	35%	39%	52%	35%	75%	
	No concerns	7%	8%	6%	10%	6%	15%		6%	7%	9%	5%	11%		
	Discrimination against Japanese	7%	3%	7%	10%	2%		19%	8%	6%	4%	9%	5%		
	Other	5%	2%	7%	3%	6%		13%	8%		3%	11%	5%		
	Should spend at home	1%		1%	1%	2%			2%			5%	3%		
	Don't know	1%		1%						2%					
	Total	Count	351	60	148	94	47	20	31	49	84	80	44	37	4

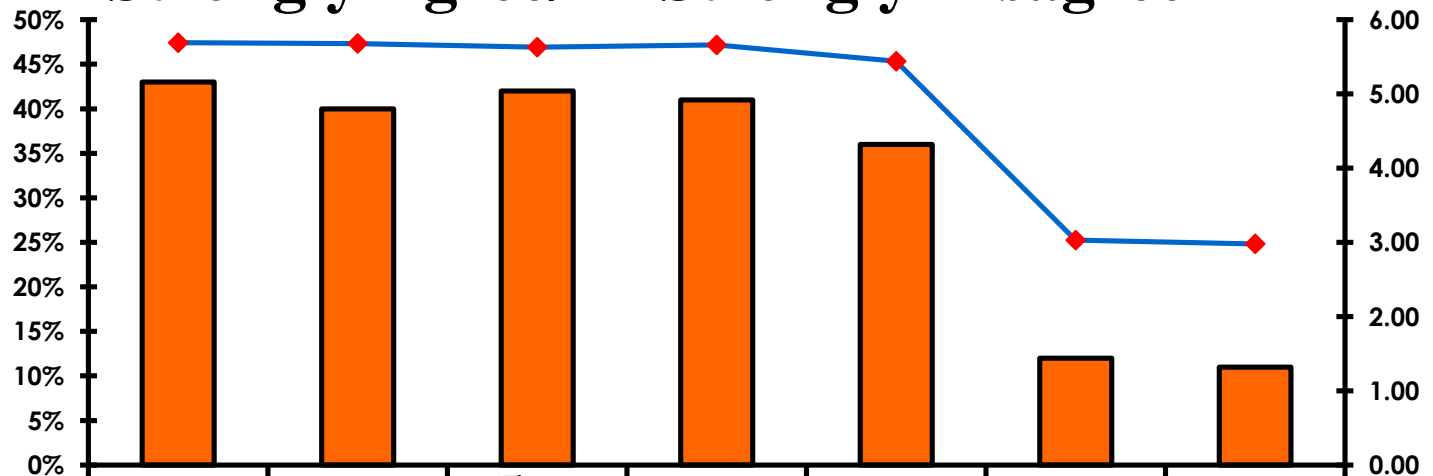
Security Screening/ Immigration Process at Guam International Airport



Airport Screening

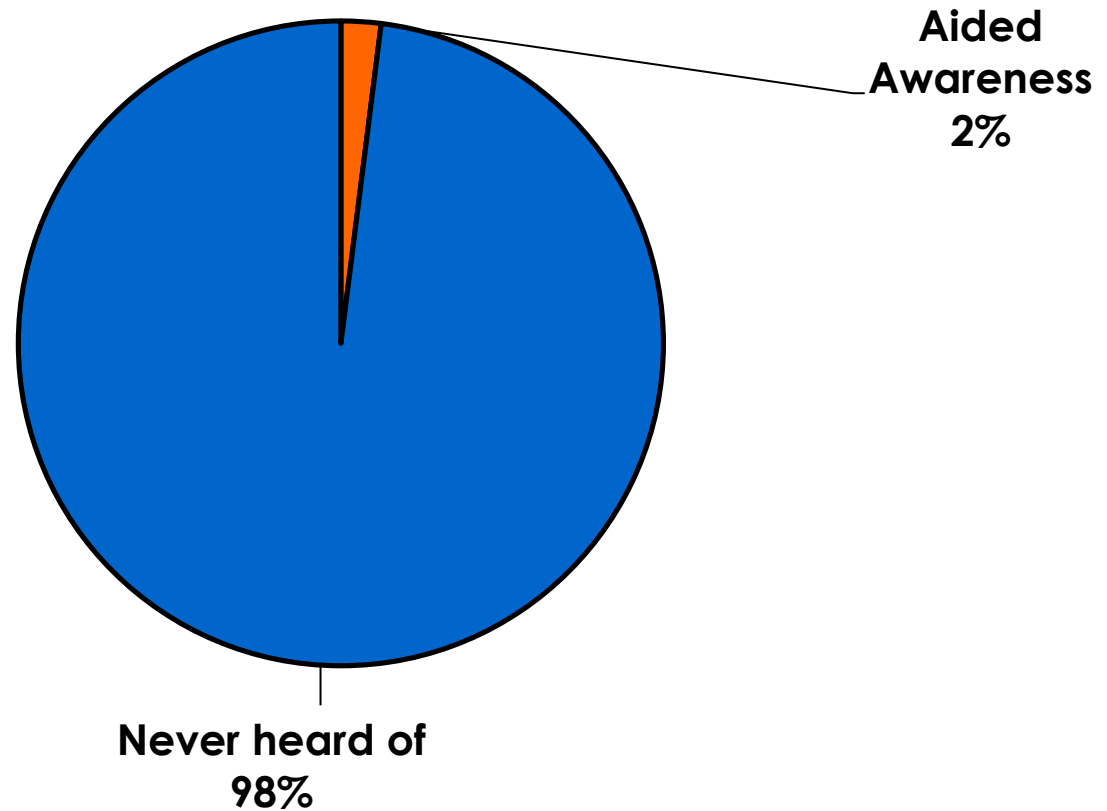
7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



	Time drop bags for screen reasonable	Signs bag screen reasonable	Time clear security enter secured area reasonable	Screening officer-good	Officer careful w/ belongings	Officer abused authority	Officer rude/unprof
Strongly agree	43%	40%	42%	41%	36%	12%	11%
MEAN	5.69	5.68	5.63	5.66	5.44	3.03	2.98

Shop Guam Festival



Shop Guam Festival - Impact

n=7

