



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015 Market Segmentation

AUGUST 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

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families
 - OL's/ salary women
 - Group travelers
 - Silvers
 - Wedding participants
 - Sports activities/spectators
 - 18-35
 - 36-55
 - Traveling with children
 - Honeymooners
 - Repeat visitors
 - To identify (for all Japanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments Parameters

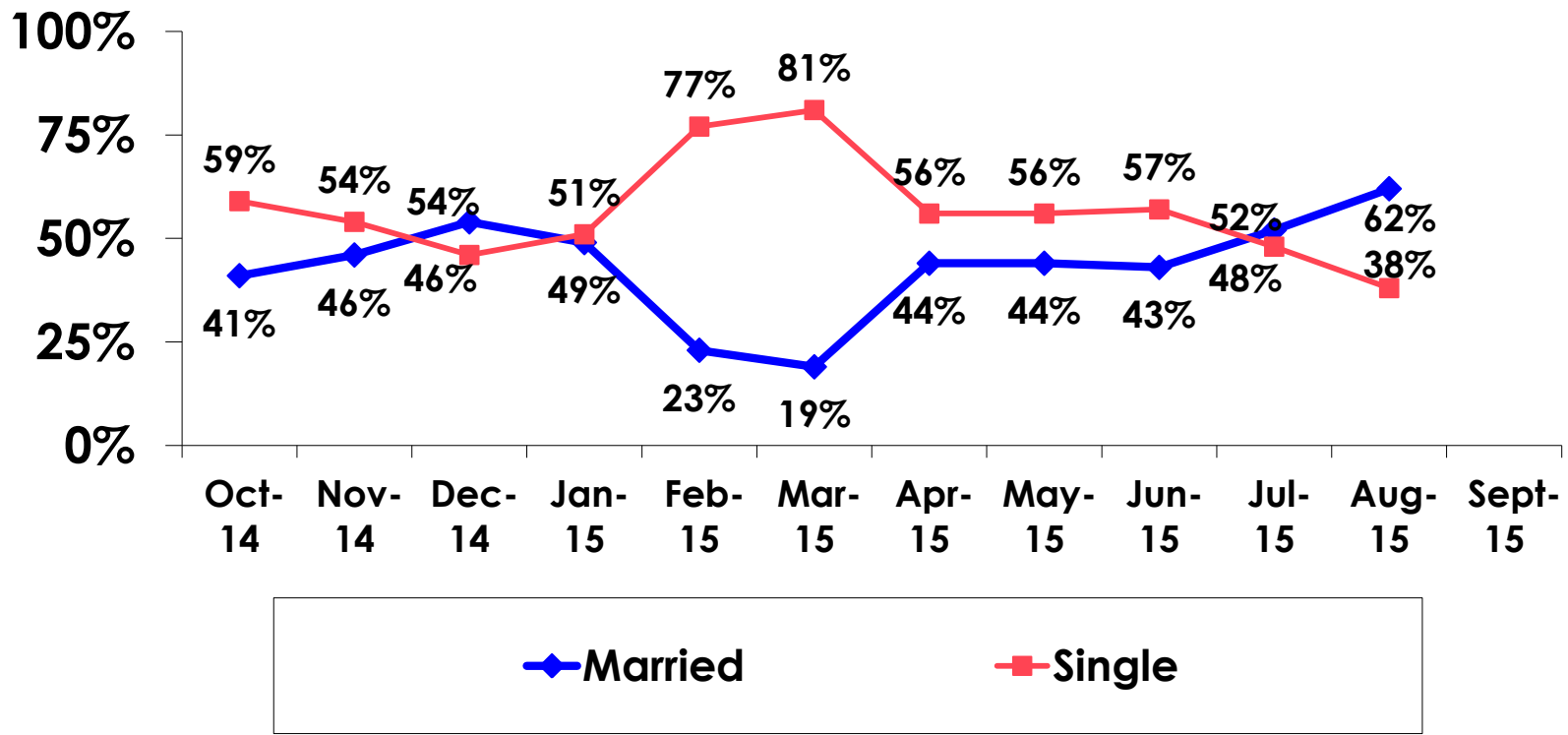
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators – Q.5/Q.19
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	July 15	Aug 15	Sept 15
Families	36%	39%	59%	46%	23%	21%	37%	45%	42%	52%	67%	
Office Lady	13%	11%	10%	12%	8%	2%	9%	16%	19%	12%	7%	
Group	5%	3%	1%	4%	5%	4%	5%	3%	4%	2%	1%	
Silver	2%	5%	3%	5%	3%	0%	4%	4%	5%	3%	1%	
Wedding	9%	6%	0%	3%	2%	1%	6%	6%	10%	5%	2%	
Sport	32%	29%	35%	27%	33%	41%	32%	29%	29%	28%	36%	
18-35	71%	63%	48%	56%	83%	84%	60%	62%	66%	60%	41%	
36-55	25%	29%	46%	36%	13%	13%	34%	30%	25%	34%	56%	
Child	11%	12%	35%	19%	7%	10%	13%	13%	9%	25%	51%	
Honey-moon	4%	5%	3%	4%	4%	2%	5%	4%	5%	4%	1%	
Repeat	43%	43%	51%	50%	34%	25%	45%	43%	47%	46%	51%	
TOTAL	351	350	351	350	350	352	352	352	352	352	352	

SECTION 1 **PROFILE OF RESPONDENTS**

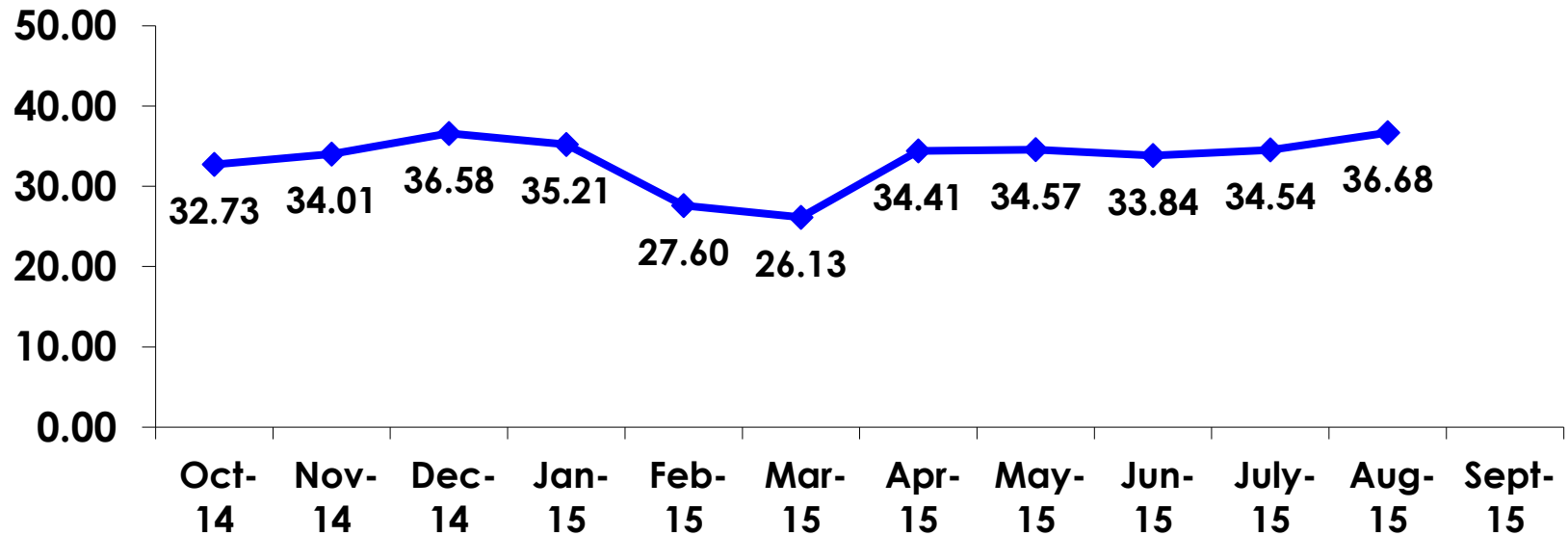
MARITAL STATUS - TRACKING



MARITAL STATUS- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QE	Married	62%	87%	12%	20%	100%	50%	57%	18%	92%	94%	100%	71%
	Single	38%	13%	88%	80%		50%	43%	82%	8%	6%		29%
	Total Count	350	237	25	5	4	6	127	145	196	178	4	179

AVERAGE AGE - TRACKING



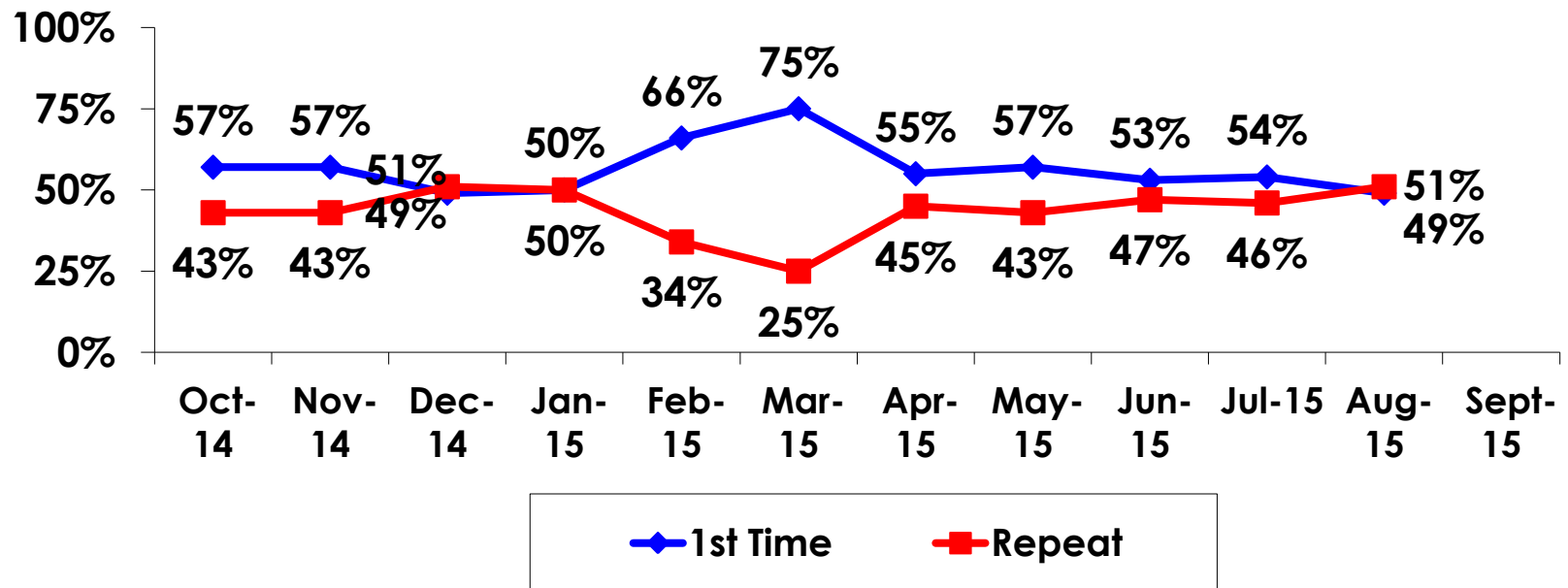
AGE- SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
QF	18-24	18%	5%	12%	40%		17%	22%	43%		1%		7%
	25-34	22%	10%	44%	40%		50%	22%	52%		5%	100%	18%
	35-49	51%	72%	40%	20%		17%	45%	5%	88%	84%		64%
	50+	9%	13%	4%		100%	17%	11%		12%	10%		11%
	Total Count	350	237	25	5	4	6	127	145	196	178	4	179
QF	Mean	36.68	41.61	32.60	26.20	64.00	31.50	35.57	25.63	43.76	42.76	27.75	39.76
	Median	40	42	29	26	64	27	37	25	43	42	27	41

INCOME - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q26	<Y2.0 million	4%	1%	4%				5%	10%	1%	1%		3%
	Y2.0M-Y3.0M	9%	2%	25%	25%		17%	9%	21%	1%	1%		3%
	Y3.0M-Y4.0M	10%	6%	21%	50%		50%	10%	21%	3%	4%	25%	8%
	Y4.0M-Y5.0M	13%	13%	17%			17%	13%	16%	13%	14%	25%	10%
	Y5.0M-Y7.0M	15%	18%	25%			17%	16%	10%	18%	17%	50%	15%
	Y7.0M-Y10.0M	22%	27%	8%	25%	67%		23%	8%	32%	29%		29%
	Y10.0M+	26%	33%			33%		23%	14%	31%	33%		31%
	No Income	1%	1%					1%	1%	1%	1%		1%
	Total Count	326	230	24	4	3	6	115	126	191	174	4	172

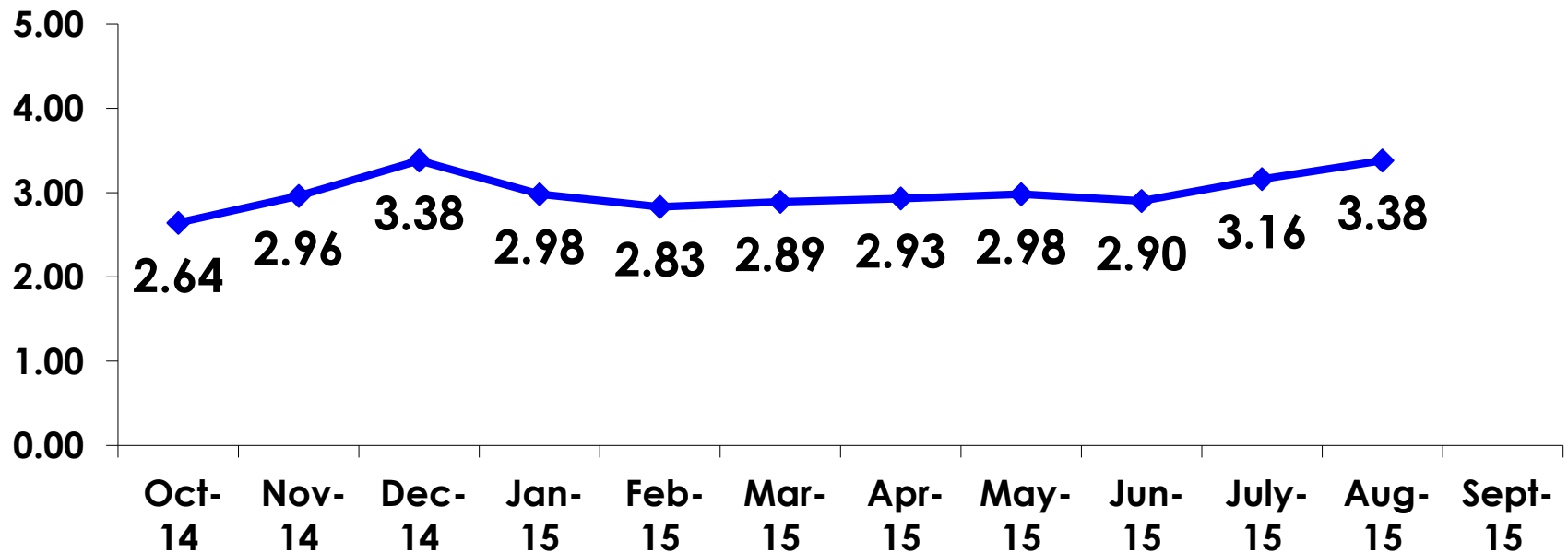
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q3A	Yes	49%	42%	54%	40%	25%	67%	50%	66%	38%	40%	100%		
	No	51%	58%	46%	60%	75%	33%	50%	34%	62%	60%		100%	
	Total	Count	352	239	26	5	4	6	127	145	196	179	4	180

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
Q8	Mean	3.38	3.60	3.23	2.60	4.25	2.83	3.41	2.94	3.68	3.69	3.33	3.57
	Median	3	3	3	3	3	3	3	3	3	4	3	3

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q7	Free-time package tour	60%	56%	68%		75%	67%	60%	64%	56%	55%	75%	56%	
	Full package tour	22%	22%	20%			33%	24%	23%	21%	22%	25%	20%	
	Individually arranged travel (FIT)	17%	22%	8%		25%		14%	10%	22%	22%		22%	
	Group tour	1%	1%		100%			2%	3%	1%	1%		2%	
	Company paid travel	0%		4%					1%					
	Total	Count	347	234	25	5	4	6	125	145	192	175	4	178

TRAVEL MOTIVATION - SEGMENTATION

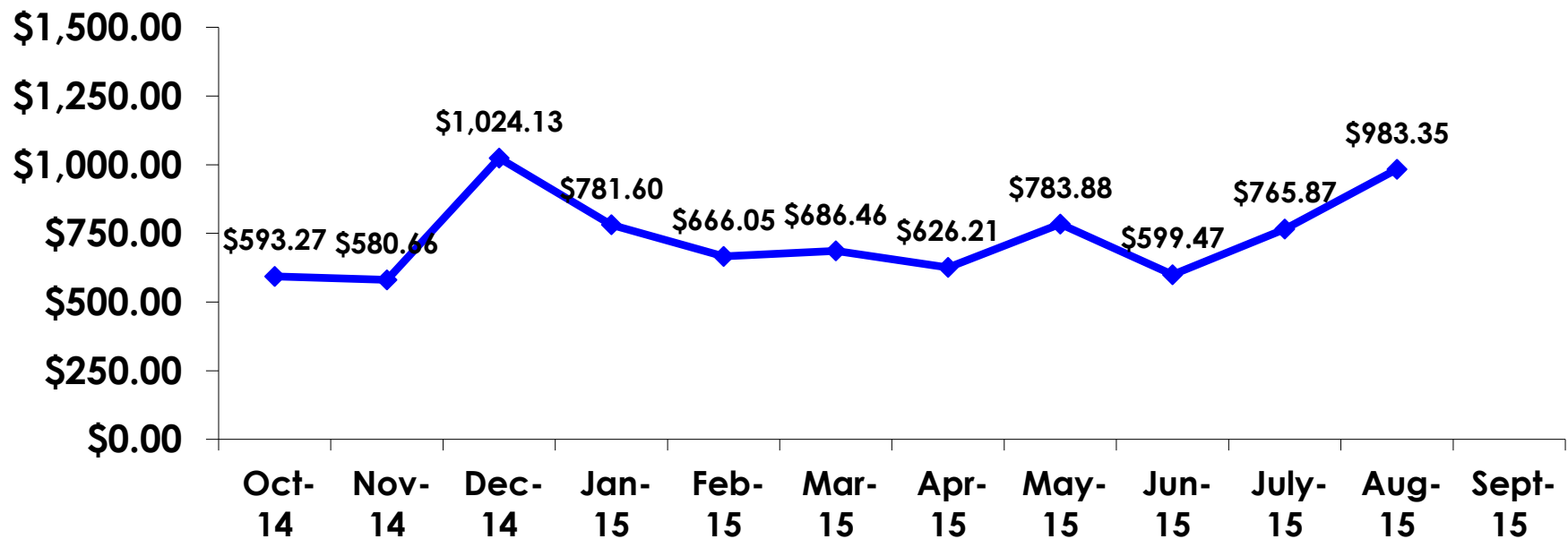
	TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
	-	-	-	-	-	-	-	-	-	-	-	-	
Q5A Previous trip	44%	52%	44%	20%	50%	33%	39%	27%	56%	55%		86%	
Price	18%	17%	20%		25%	17%	22%	19%	17%	16%	50%	14%	
Visit friends/ Relatives	2%	2%	4%		25%		1%	2%	1%	1%	25%	2%	
Recomm- friend/family/trvl agnt	19%	15%	24%		25%		20%	28%	13%	13%	25%	9%	
Scuba	3%	4%					8%	5%	3%	3%		2%	
Water sports	31%	27%	32%		25%		46%	37%	28%	28%		24%	
Short travel time	65%	71%	40%	20%	100%		69%	58%	70%	74%	75%	69%	
Golf	3%	3%					3%		4%	3%		5%	
Relax	42%	39%	16%	20%	50%		43%	46%	39%	39%		46%	
Company/ Business Trip	1%	0%	4%	40%				2%	1%	1%		1%	
Company Sponsored	1%	2%					1%		2%	2%		1%	
Safe	33%	41%	8%		75%	17%	30%	17%	43%	45%		38%	
Natural beauty	69%	66%	52%	40%	75%	17%	73%	72%	68%	70%	50%	66%	
Shopping	34%	29%	24%	40%	50%	17%	32%	41%	29%	30%		34%	
Married/ Attn wedding	2%	1%	8%			100%		3%	1%			1%	
Honeymoon	1%	2%					2%	3%			100%		
Pleasure	60%	57%	56%	20%	50%		64%	61%	60%	61%	50%	62%	
Organized sports	2%	2%					2%	2%	2%	2%		2%	
Other	2%	3%					2%	1%	3%	3%		2%	
Total	Count	351	238	25	5	4	6	127	145	196	179	4	180

INFORMATION SOURCES - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT	
		-	-	-	-	-	-	-	-	-	-	-	-	
Q1	Internet	82%	83%	73%	100%	75%	67%	83%	83%	82%	84%	50%	82%	
	Travel Guidebook-Bookstore	58%	58%	58%	20%	50%	67%	59%	61%	57%	59%	75%	50%	
	Prior Trip	46%	53%	46%	20%	50%	33%	44%	30%	57%	55%		90%	
	Travel Agent Brochure	44%	46%	42%	40%	25%	33%	46%	41%	46%	47%	100%	38%	
	Magazine (Consumer)	37%	35%	27%			50%	36%	43%	34%	34%	50%	31%	
	Friend/ Relative	23%	17%	27%		50%	17%	19%	37%	13%	16%	50%	13%	
	TV	22%	22%	19%				21%	28%	18%	20%	50%	18%	
	Co-Worker/ Company Trvl Dept	2%	1%					2%	4%	1%	1%		1%	
	Consumer Trvl Show	1%	1%	4%				2%	1%	1%	1%		2%	
	Newspaper	1%	1%					2%	1%	2%	1%		2%	
	Other	1%	0%					2%	1%	1%	1%		1%	
	Radio	0%						1%	1%				1%	
	GVB Office	0%	0%							1%			1%	
	Total	Count	351	238	26	5	4	6	126	145	195	179	4	179

SECTION 3 **EXPENDITURES**

PREPAID EXPENDITURES - TRACKING



YTD=\$735.90

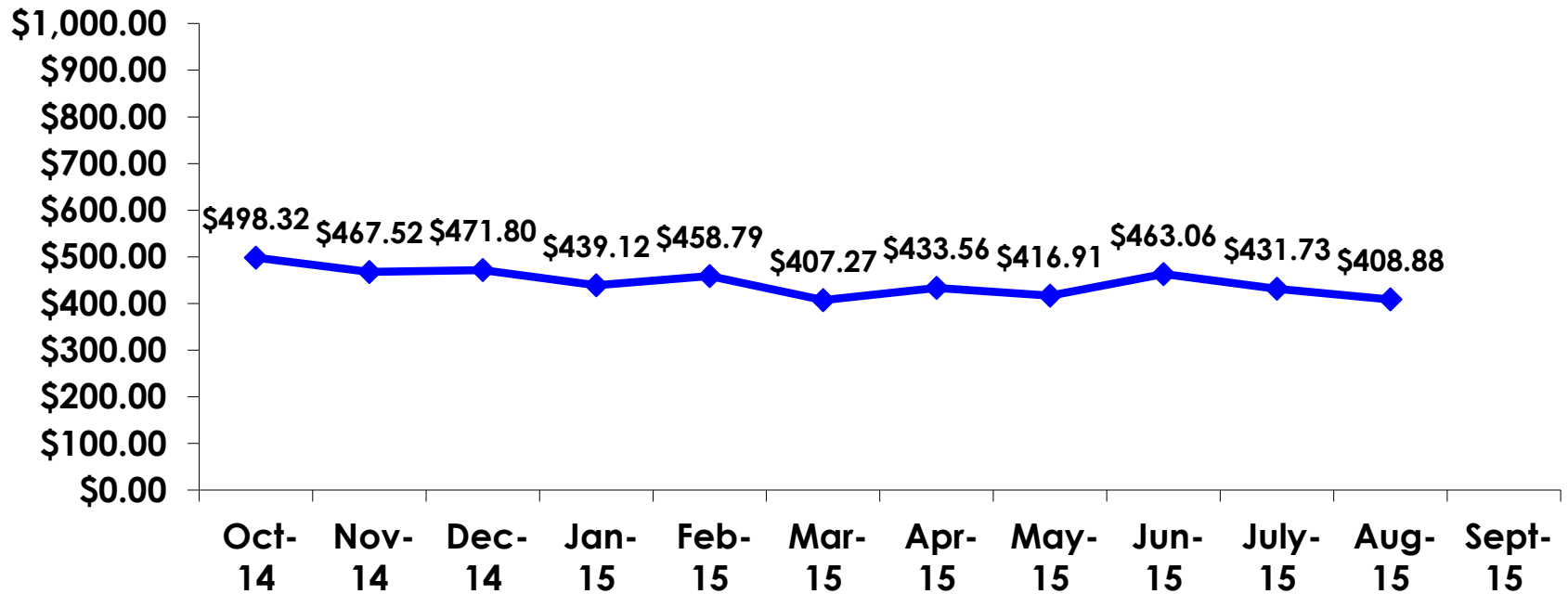
PREPAID EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$983.35	\$984.75	\$975.85	\$431.82	\$896.24	\$606.51	\$993.72	\$941.63	\$1,013.56	\$1,022.09	\$1,454.95	\$980.70
	Median	\$985	\$1,015	\$974	\$528	\$879	\$791	\$995	\$893	\$1,032	\$1,028	\$1,542	\$1,015
	Minimum	\$0	\$0	\$0	\$0	\$812	\$0	\$0	\$0	\$0	\$0	\$1,136	\$0
	Maximum	\$2,841	\$2,841	\$1,894	\$731	\$1,015	\$1,082	\$2,841	\$2,273	\$2,841	\$2,841	\$1,599	\$2,841

PREPAID EXPENDITURES BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
AIR & HOTEL	Mean	\$2,726.79	\$3,794.40	\$2,021.92	\$906.39	\$2,867.97	\$1,603.08	\$2,543.85	\$1,655.63	\$3,780.64	\$4,280.70	\$3,084.42	\$3,023.39
	Median	\$2,192	\$3,653	\$1,542	\$731	\$1,623	\$1,096	\$1,623	\$1,153	\$3,653	\$4,058	\$3,084	\$2,963
AIR/ HOTEL/ MEAL	Mean	\$4,236.82	\$4,781.07	\$6,168.83	\$568.18	.	.	\$4,306.72	\$2,553.70	\$4,966.18	\$5,296.27	\$2,759.74	\$4,638.80
	Median	\$4,058	\$4,058	\$4,058	\$568	.	.	\$3,247	\$2,273	\$4,261	\$4,870	\$2,922	\$4,261
AIR ONLY	Mean	\$2,308.32	\$2,474.72	.	.	\$2,922.08	.	\$3,136.07	\$1,168.83	\$2,498.73	\$2,596.59	.	\$2,393.47
	Median	\$2,192	\$2,273	.	.	\$2,922	.	\$2,597	\$771	\$2,261	\$2,435	.	\$2,220
HOTEL ONLY	Mean	\$1,361.83	\$1,553.03	.	.	\$1,055.19	.	\$2,159.09	\$405.84	\$1,588.59	\$1,588.59	.	\$1,463.74
	Median	\$974	\$1,055	.	.	\$1,055	.	\$974	\$244	\$1,015	\$1,015	.	\$974
HOTEL & MEAL	Mean	\$1,521.92	\$1,758.66	.	.	.	.	\$2,029.22	\$811.69	\$1,758.66	\$2,069.81	.	\$1,758.66
	Median	\$1,583	\$2,029	.	.	.	.	\$2,029	\$812	\$2,029	\$2,070	.	\$2,029
F&B HOTEL	Mean	.	.	.	.	.	.	.	.	.	.	.	.
	Median	.	.	.	.	.	.	.	.	.	.	.	.
TRANS- JAPAN	Mean	\$62.95	\$73.17	\$81.17	.	\$81.17	.	\$80.36	\$49.99	\$71.53	\$70.33	\$32.47	\$51.36
	Median	\$41	\$49	\$61	.	\$81	.	\$49	\$37	\$61	\$42	\$32	\$41
TRANS- GUAM	Mean	\$244.72	\$244.72	.	.	.	.	\$446.43	.	\$244.72	\$311.15	.	\$244.72
	Median	\$63	\$63	.	.	.	.	\$446	.	\$63	\$81	.	\$63
OPT TOURS	Mean	\$333.29	\$418.96	\$324.68	\$146.10	.	.	\$369.32	\$182.85	\$500.09	\$486.59	\$243.51	\$321.78
	Median	\$215	\$284	\$325	\$146	.	.	\$244	\$162	\$365	\$325	\$244	\$203
OTHER	Mean	\$506.37	\$600.65	\$162.34	\$162.34	\$324.68	.	\$367.97	\$318.59	\$622.97	\$711.97	.	\$649.35
	Median	\$203	\$325	\$162	\$162	\$325	.	\$244	\$183	\$406	\$812	.	\$649
TOTAL	Mean	\$2,729.97	\$3,439.99	\$2,298.33	\$719.16	\$3,246.75	\$1,068.72	\$2,765.04	\$1,625.59	\$3,528.76	\$3,940.51	\$2,909.90	\$2,954.64
	Median	\$2,374	\$3,247	\$1,623	\$731	\$2,841	\$974	\$2,273	\$1,218	\$3,287	\$3,653	\$3,084	\$2,719

ON-ISLAND EXPENDITURES - TRACKING



YTD = \$445.13

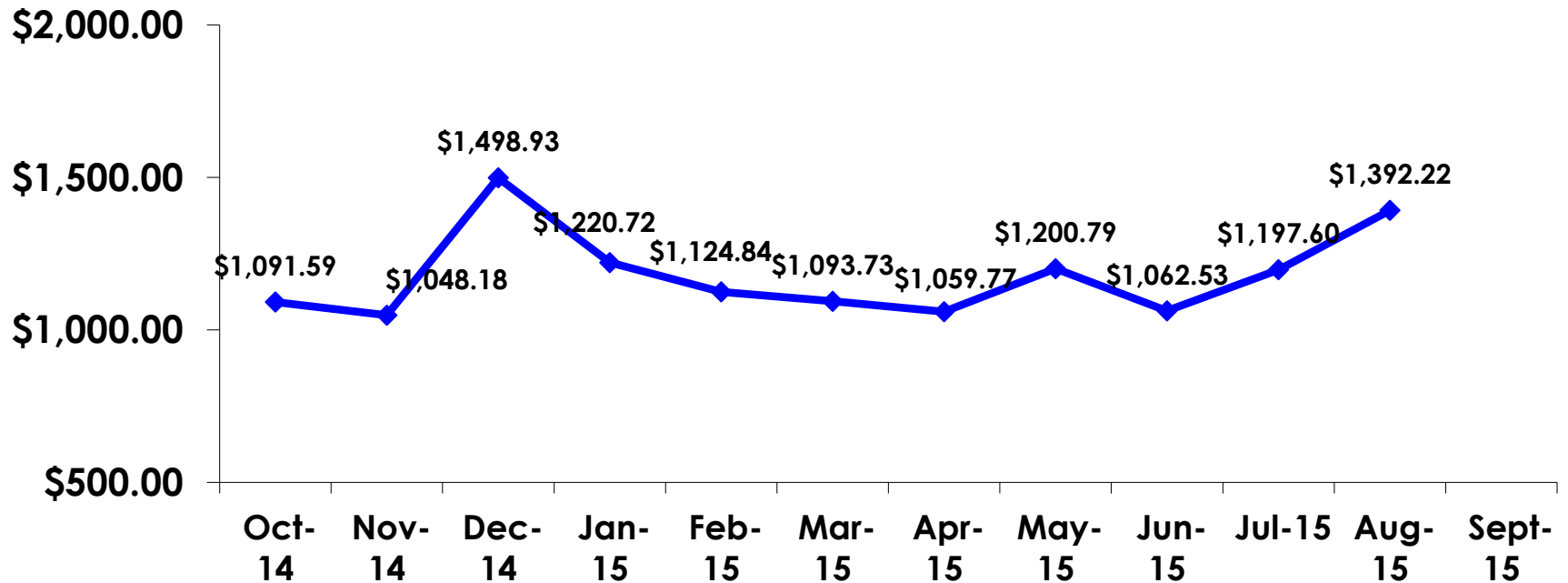
ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
PER PERSON	Mean	\$408.88	\$393.35	\$453.72	\$193.33	\$321.67	\$277.58	\$442.36	\$412.17	\$399.48	\$359.57	\$598.50	\$458.54
	Median	\$313	\$300	\$340	\$167	\$223	\$218	\$333	\$343	\$300	\$267	\$550	\$371
	Minimum	\$0	\$0	\$0	\$0	\$167	\$131	\$0	\$0	\$0	\$0	\$390	\$0
	Maximum	\$2,500	\$2,500	\$1,700	\$600	\$675	\$600	\$2,500	\$1,700	\$2,500	\$2,500	\$904	\$2,500

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
F&B HOTEL	Mean	\$65.61	\$92.36	\$38.46	\$0.00	\$67.50	\$4.67	\$64.51	\$25.56	\$95.66	\$103.50	\$25.00	\$84.26
F&B FF/STORE	Mean	\$46.53	\$54.16	\$29.81	\$10.00	\$57.50	\$17.00	\$38.84	\$30.52	\$58.01	\$56.45	\$130.00	\$54.52
F&B RESTRNT	Mean	\$123.65	\$159.28	\$57.69	\$20.00	\$257.50	\$41.17	\$111.76	\$89.69	\$142.55	\$179.83	\$267.50	\$132.30
OPT TOUR	Mean	\$104.32	\$133.45	\$71.35	\$20.00	\$45.00	\$0.00	\$143.84	\$54.35	\$140.66	\$135.28	\$305.00	\$120.42
GIFT- SELF	Mean	\$189.53	\$217.79	\$301.92	\$42.00	\$295.00	\$28.67	\$219.33	\$150.45	\$195.52	\$225.53	\$137.50	\$223.30
GIFT- OTHER	Mean	\$110.36	\$136.23	\$62.69	\$48.00	\$137.50	\$55.00	\$129.21	\$68.05	\$135.10	\$142.01	\$212.50	\$135.54
TRANS	Mean	\$18.15	\$22.85	\$0.38	\$20.00	\$37.50	\$1.00	\$18.21	\$6.94	\$25.95	\$25.60	\$7.00	\$27.73
OTHER	Mean	\$353.97	\$431.88	\$161.15	\$100.00	\$250.00	\$257.67	\$334.89	\$216.74	\$464.90	\$460.91	\$0.00	\$474.93
TOTAL	Mean	\$996.20	\$1,229.17	\$722.31	\$260.00	\$1,147.50	\$405.17	\$1,060.67	\$603.61	\$1,258.36	\$1,303.96	\$1,084.50	\$1,253.07

TOTAL EXPENDITURES – TRACKING



YTD=\$1,181.03

TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	OFFICE LADY	GROUP TRVL	SILVERS	WEDDING	SPORT	18-35	36-55	WITH CHILD	HONEYMOON	REPEAT
		-	-	-	-	-	-	-	-	-	-	-	-
TOTAL PER PERSON	Mean	\$1,392.22	\$1,378.10	\$1,429.57	\$625.15	\$1,217.91	\$884.09	\$1,436.08	\$1,353.80	\$1,413.04	\$1,381.65	\$2,053.45	\$1,439.24
	Median	\$1,333	\$1,338	\$1,560	\$702	\$1,098	\$991	\$1,312	\$1,324	\$1,340	\$1,343	\$2,016	\$1,367
	Minimum	\$0	\$0	\$0	\$0	\$987	\$131	\$0	\$0	\$100	\$100	\$1,989	\$0
	Maximum	\$4,279	\$4,279	\$2,512	\$1,128	\$1,690	\$1,682	\$4,279	\$2,880	\$4,279	\$4,123	\$2,192	\$4,279

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, Aug 2015, and Overall Oct-2014 - Aug 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	Aug-15 rank	Combi ned Oct- 2014 - Aug 2015 rank
Quality & Cleanliness of beaches & parks		3			3	2		2			4	3
Ease of getting around										4		9
Safety walking around at night												
Quality of daytime tours		5	4									7
Variety of daytime tours												
Quality of nighttime tours												
Variety of nighttime tours												
Quality of shopping	3				4	3		3		2	3	2
Variety of shopping		4		2					4			
Price of things on Guam												
Quality of hotel accommodations			2		5	1	4			5	2	5
Quality/cleanliness of air, sky							1	4	1			
Quality/cleanliness of parks		1										
Quality of landscape in Tumon	2							1	3		1	8
Quality of landscape in Guam		2	1	1	1		3			3		1
Quality of ground handler	1						2		2	1	5	6
Quality/cleanliness of transportation vehicles			3	3	2			5				4
% of Overall Satisfaction Accounted For	47.0%	52.7%	37.9%	35.6%	44.5%	33.0%	45.6%	53.5%	50.6%	52.7%	42.9%	44.0%

NOTE: Only significant drivers are included.

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by five significant factors in the August 2015 Period. By rank order they are:
 - **Quality of landscape in Tumon,**
 - **Quality of hotel accommodations,**
 - **Quality of shopping,**
 - **Quality & cleanliness of beach & parks, and**
 - **Quality of ground handler.**
- With all five factors the overall r^2 is .429 meaning that **42.9% 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, Aug 2015 and Overall Oct-2014-Aug 2015

	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Combi ned Oct- 2014- Aug 2015
Drivers:	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank	rank
Quality & Cleanliness of beaches & parks												3
Ease of getting around			1									2
Safety walking around at night												
Quality of daytime tours												
Variety of daytime tours												
Quality of nighttime tours												
Variety of nighttime tours												
Quality of shopping								1				1
Variety of shopping			2									
Price of things on Guam												
Quality of hotel accommodations												
Quality/cleanliness of air, sky												
Quality/cleanliness of parks												
Quality of landscape in Tumon												
Quality of landscape in Guam												
Quality of ground handler												
Quality/cleanliness of transportation vehicles												
% of Per Person On Island Expenditures Accounted For	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	1.0%

NOTE: Only significant drivers are included.

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by no significant factor in the August 2015 Period.