



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2015

JANUARY 2015



Prepared by: QMark Research

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Background & Methodology

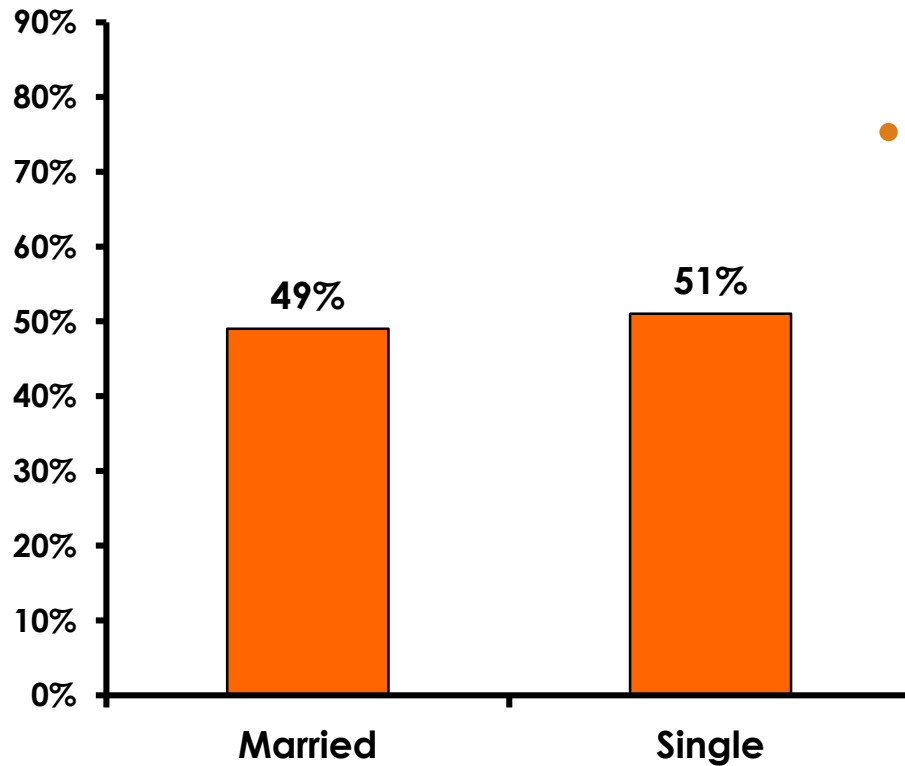
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing 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.

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.

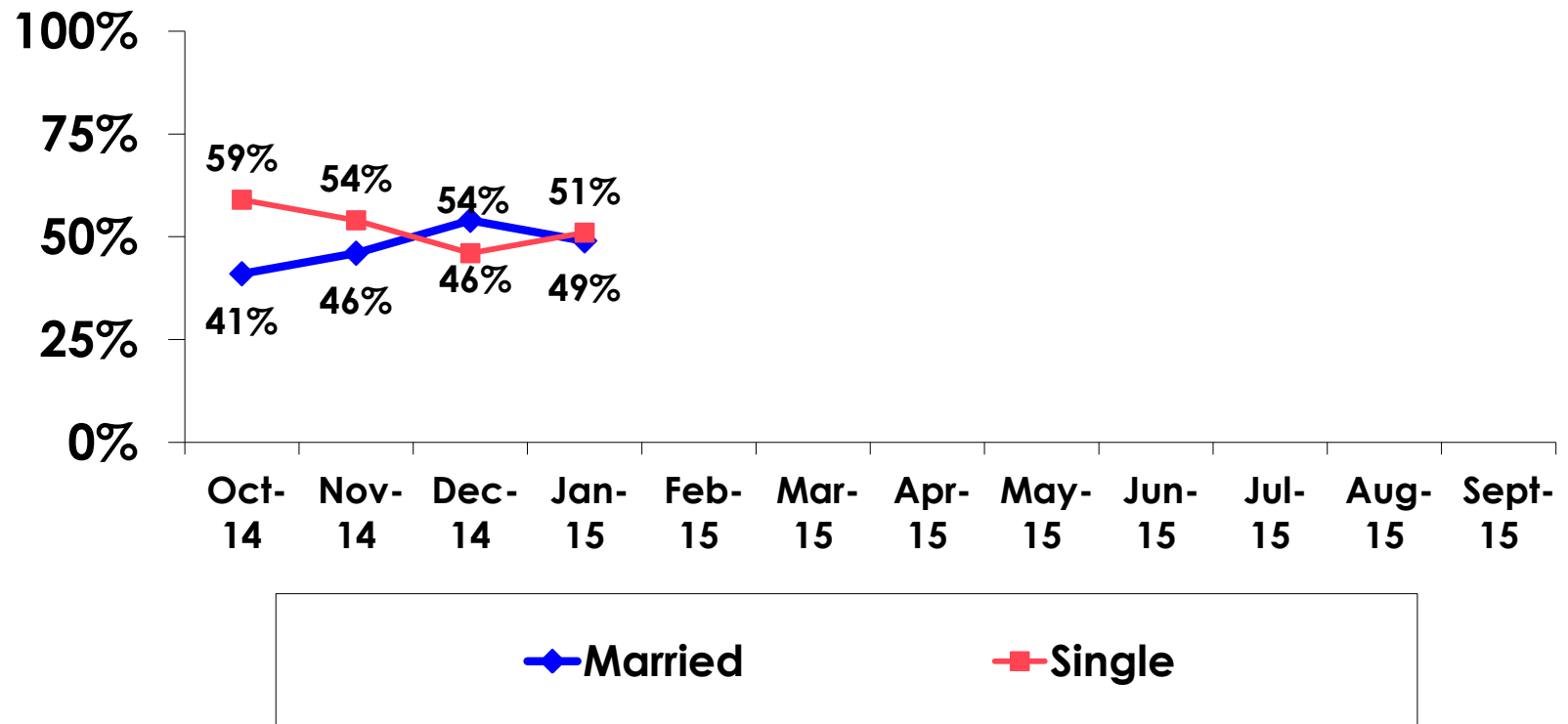
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

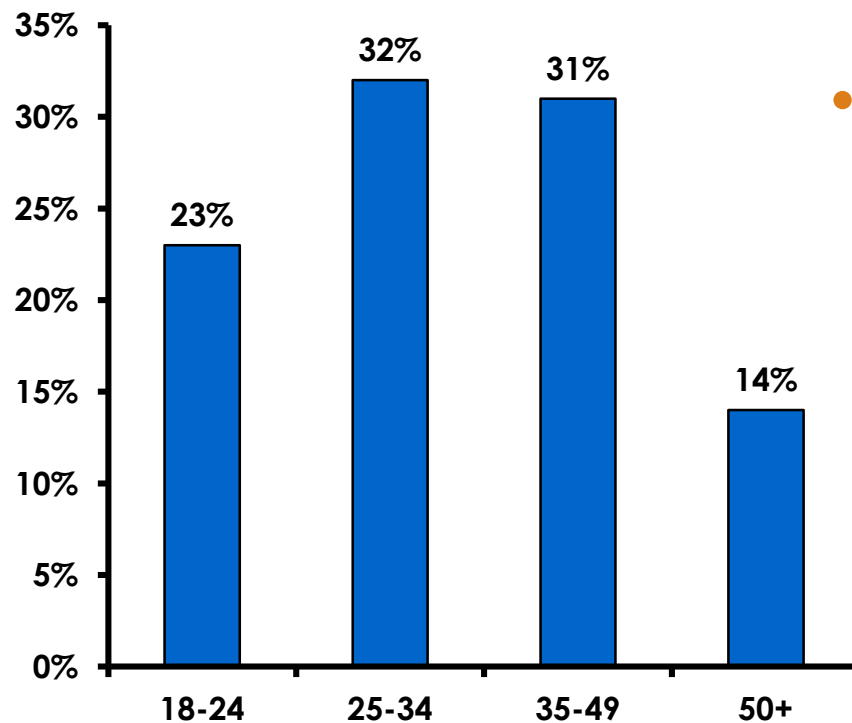


- 62% of repeat visitors are married.

MARITAL STATUS

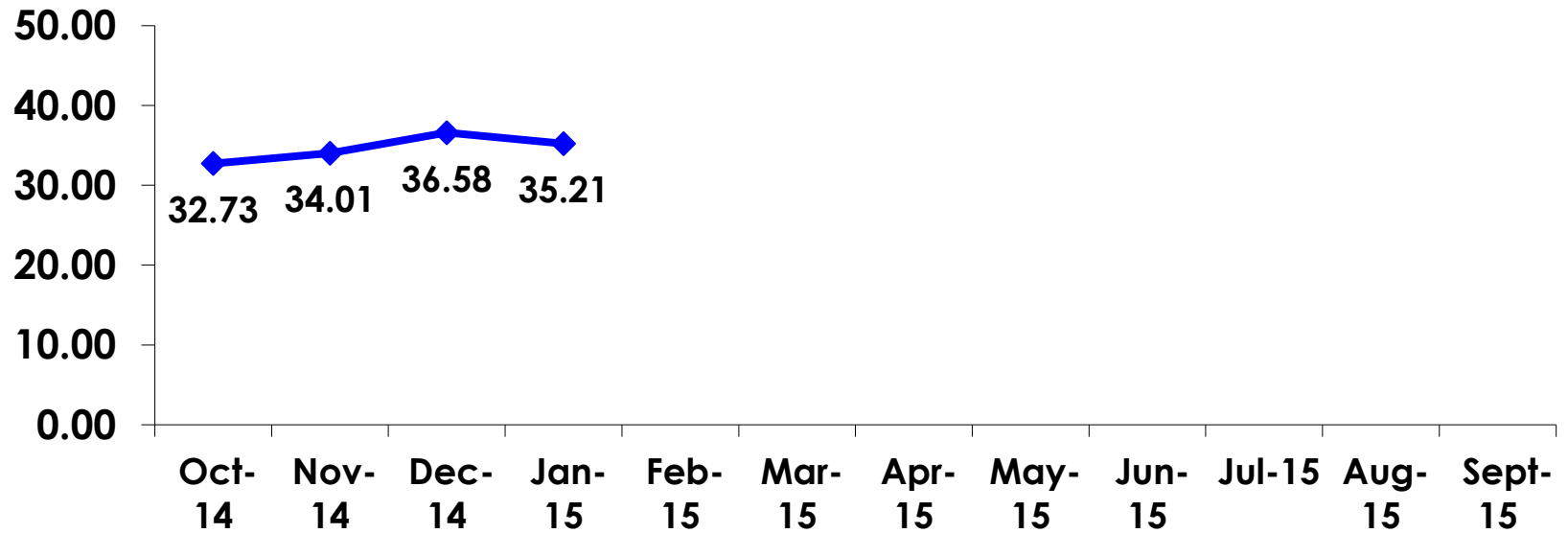


Age - Overall

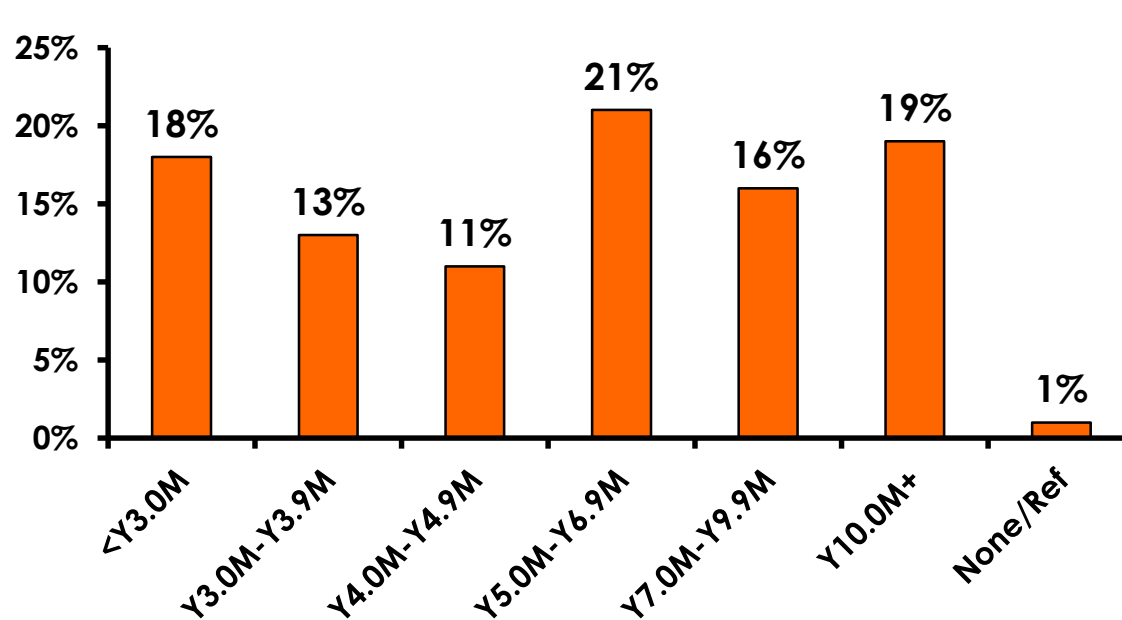


- The average age of the respondents is 35.21 years of age.

AVERAGE - AGE

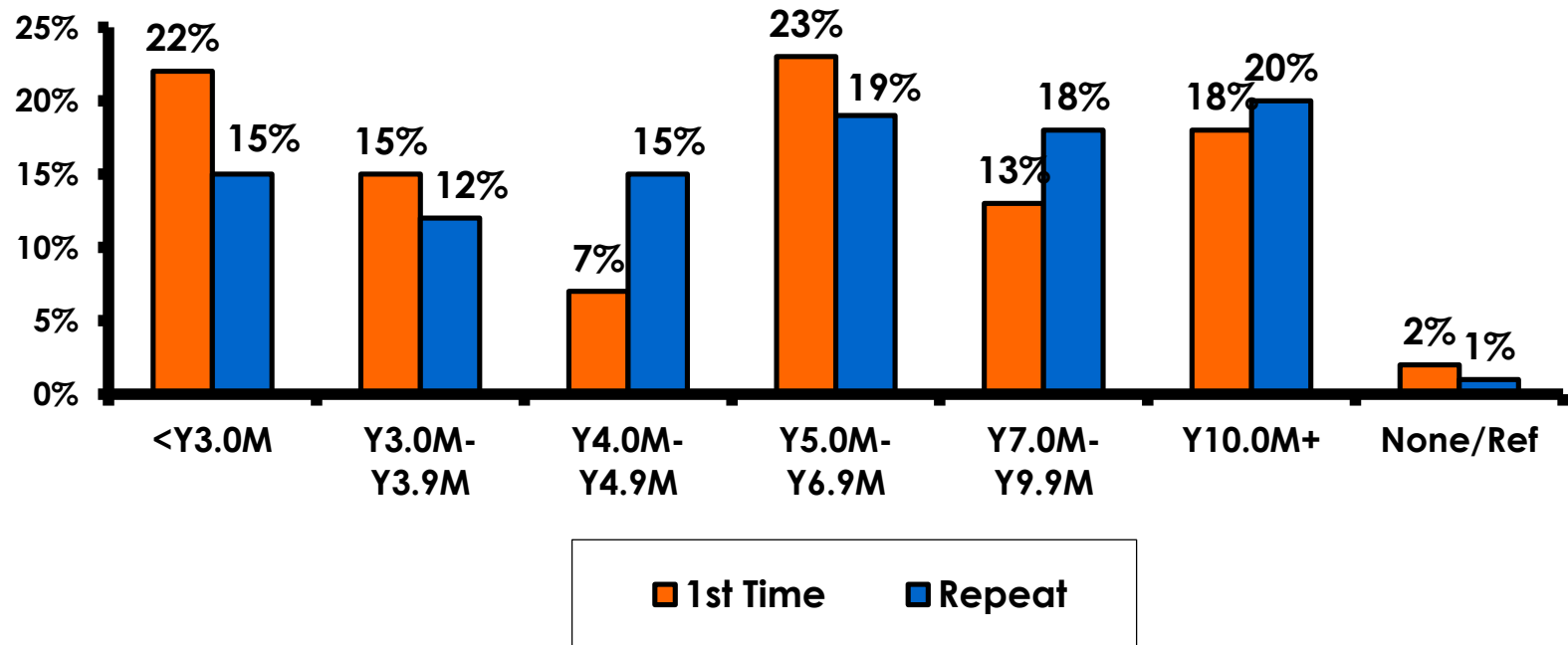


Personal Income



• ¥118.53=\$1

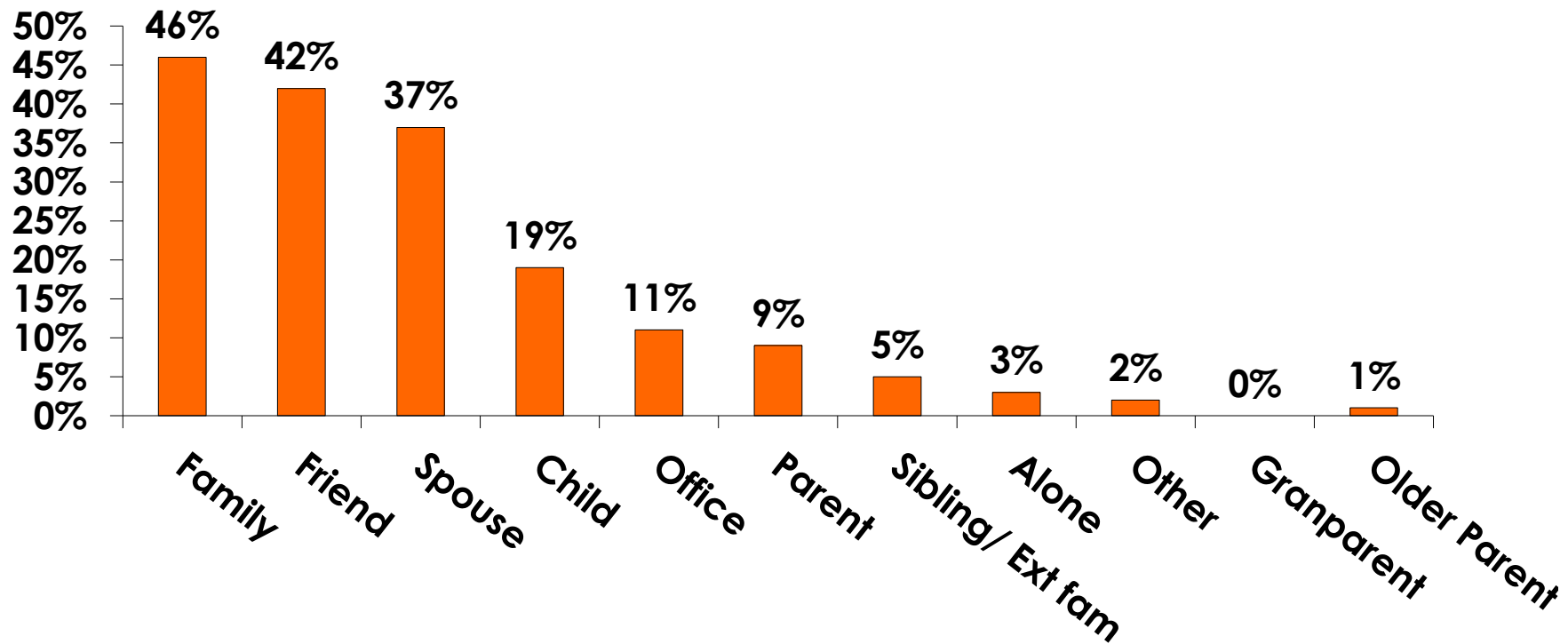
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	14	7	7	5	5	3	1
		Column N %	4%	4%	5%	7%	5%	3%	2%
Y2.0M-Y3.0M	Y2.0M-Y3.0M	Count	45	18	27	18	17	7	3
		Column N %	14%	11%	18%	26%	16%	7%	7%
Y3.0M-Y4.0M	Y3.0M-Y4.0M	Count	42	18	24	7	23	7	5
		Column N %	13%	11%	16%	10%	22%	7%	12%
Y4.0M-Y5.0M	Y4.0M-Y5.0M	Count	36	22	14	3	14	14	5
		Column N %	11%	13%	9%	4%	13%	14%	12%
Y5.0M-Y7.0M	Y5.0M-Y7.0M	Count	66	39	27	12	22	26	6
		Column N %	21%	23%	18%	17%	21%	27%	14%
Y7.0M-Y10.0M	Y7.0M-Y10.0M	Count	49	30	19	7	11	22	9
		Column N %	16%	18%	13%	10%	10%	23%	21%
Y10.0M+	Y10.0M+	Count	60	32	28	15	13	18	14
		Column N %	19%	19%	19%	21%	12%	19%	33%
No Income	No Income	Count	4	2	2	3	1		
		Column N %	1%	1%	1%	4%	1%		
Total	Total	Count	316	168	148	70	106	97	43

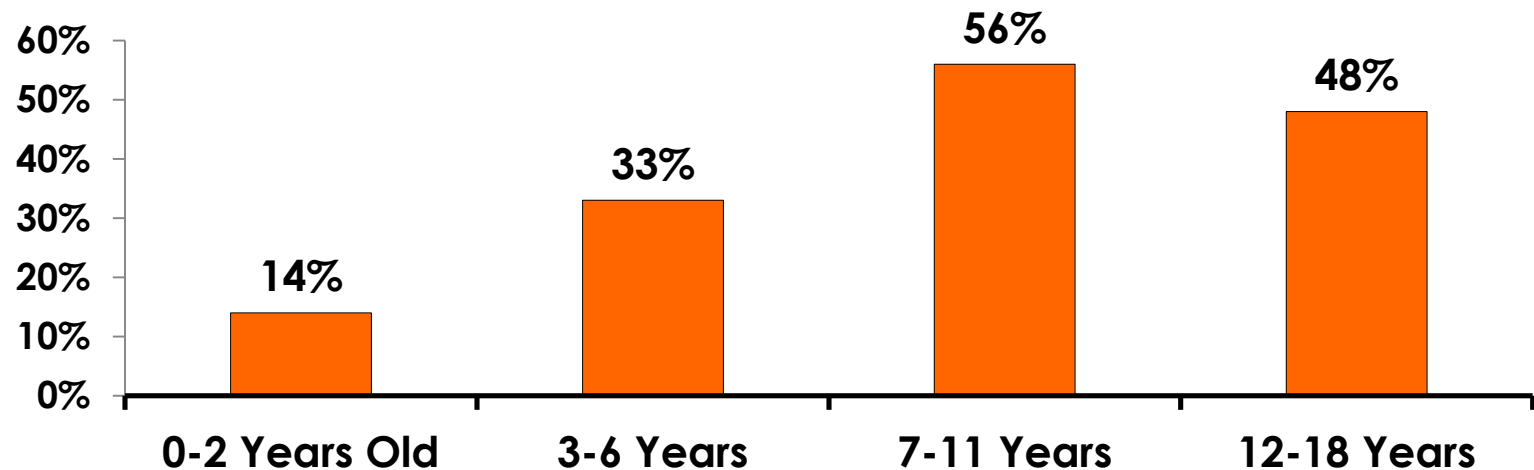
Travel Companions



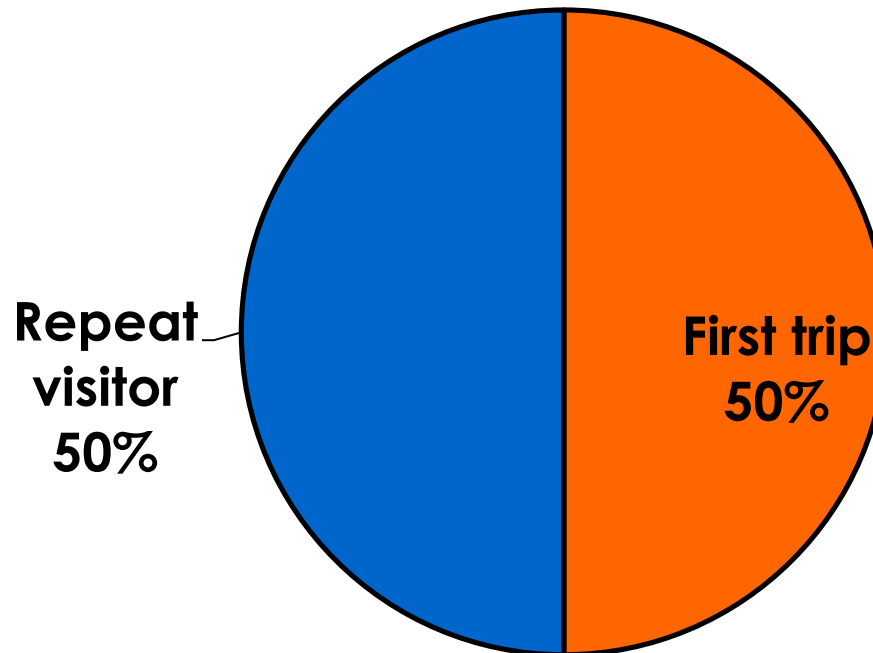
Number of Children Travel Party

N=66 total respondents traveling with children.

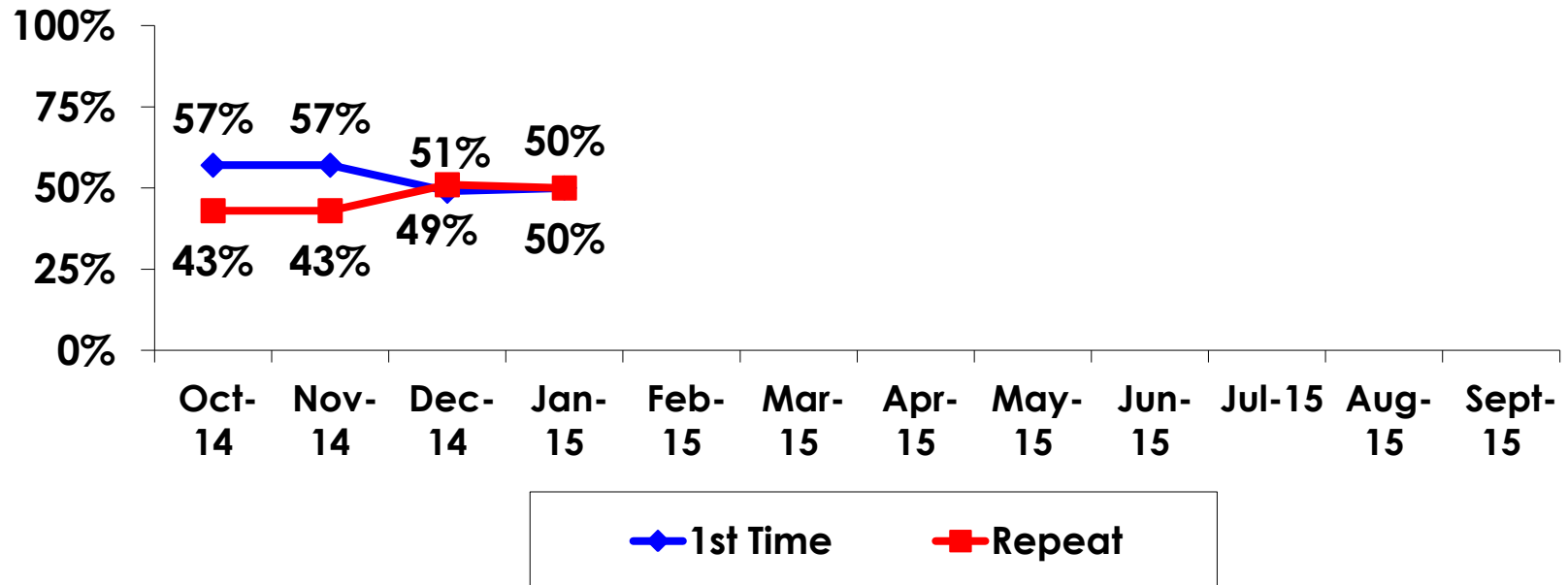
(Of those N=66 respondents, there is a total of 118 children 18 years or younger)



Prior Trips to Guam



PRIOR TRIPS TO GUAM



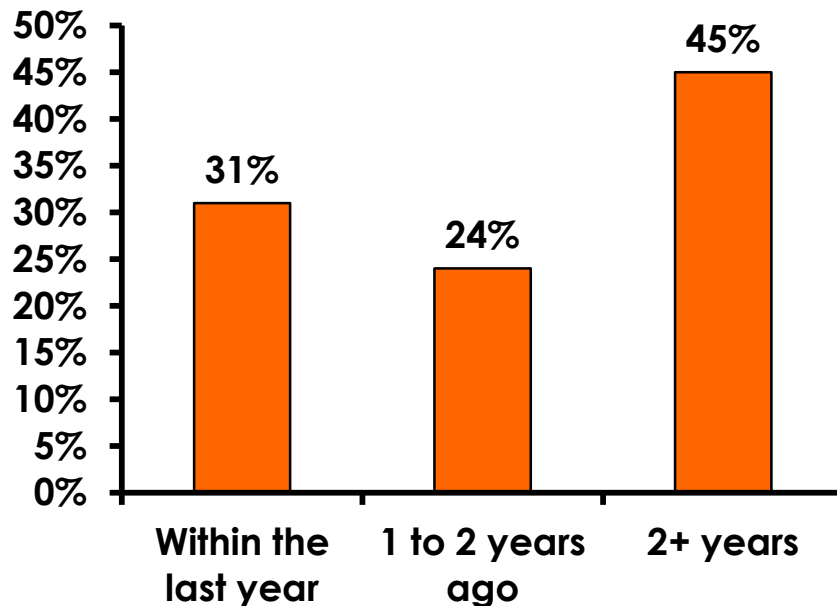
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	182	82	98
		Column N %	52%	47%	56%
	Female	Count	168	91	77
		Column N %	48%	53%	44%
	Total	Count	350	173	175
AGE	18-24	Count	81	57	23
		Column N %	23%	33%	13%
	25-34	Count	111	67	44
		Column N %	32%	39%	25%
	35-49	Count	109	35	74
		Column N %	31%	20%	43%
	50+	Count	47	13	33
		Column N %	14%	8%	19%
	Total	Count	348	172	174

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

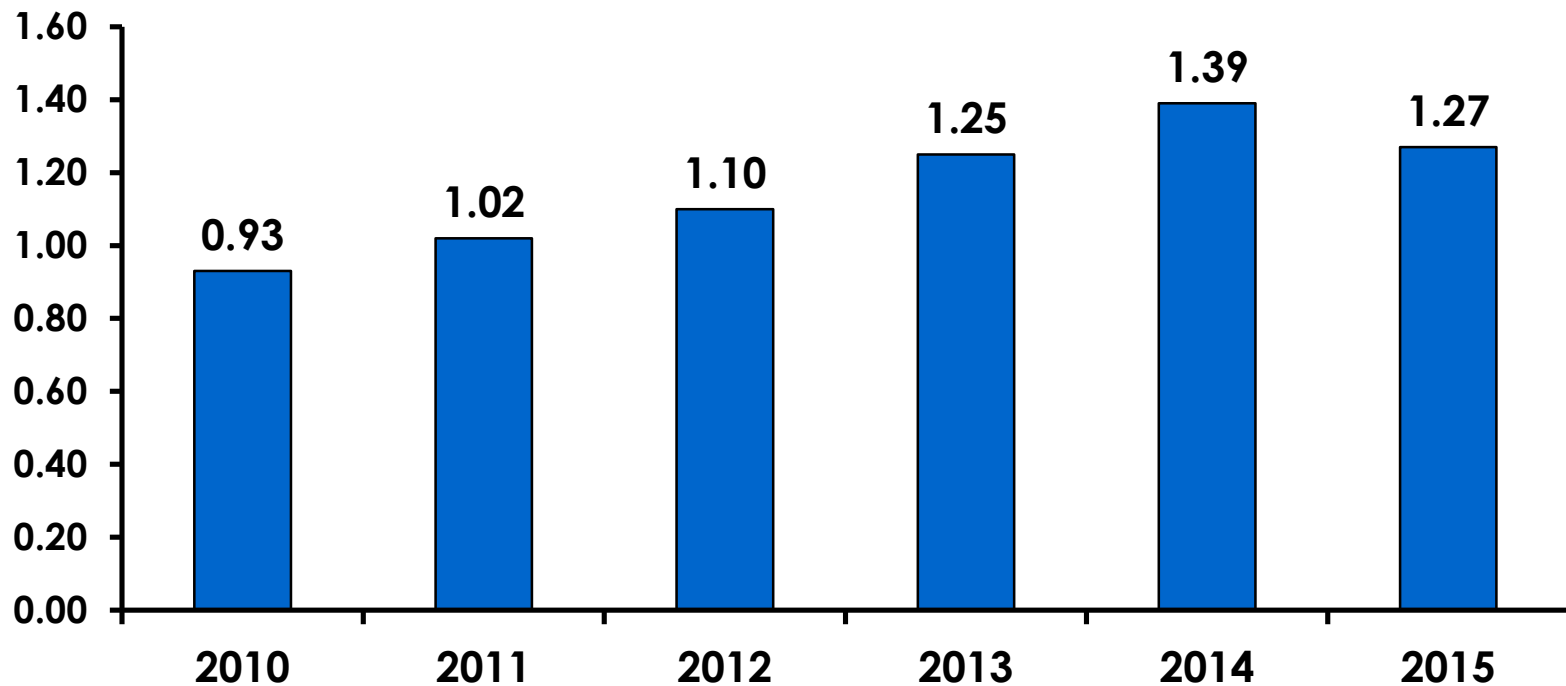
Repeat Visitors Last Trip

n = 171



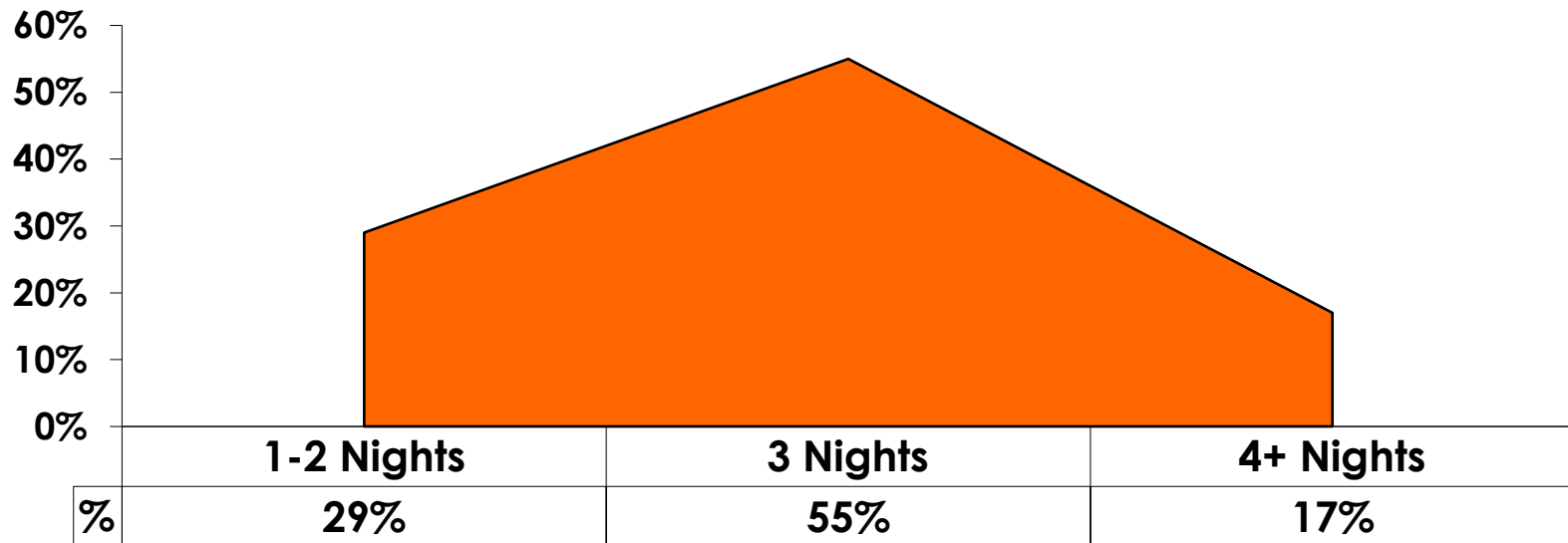
- The average repeat visitor has been to Guam 3.65 times.
- A little more than half of repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2010-2015) (2 nights or more)

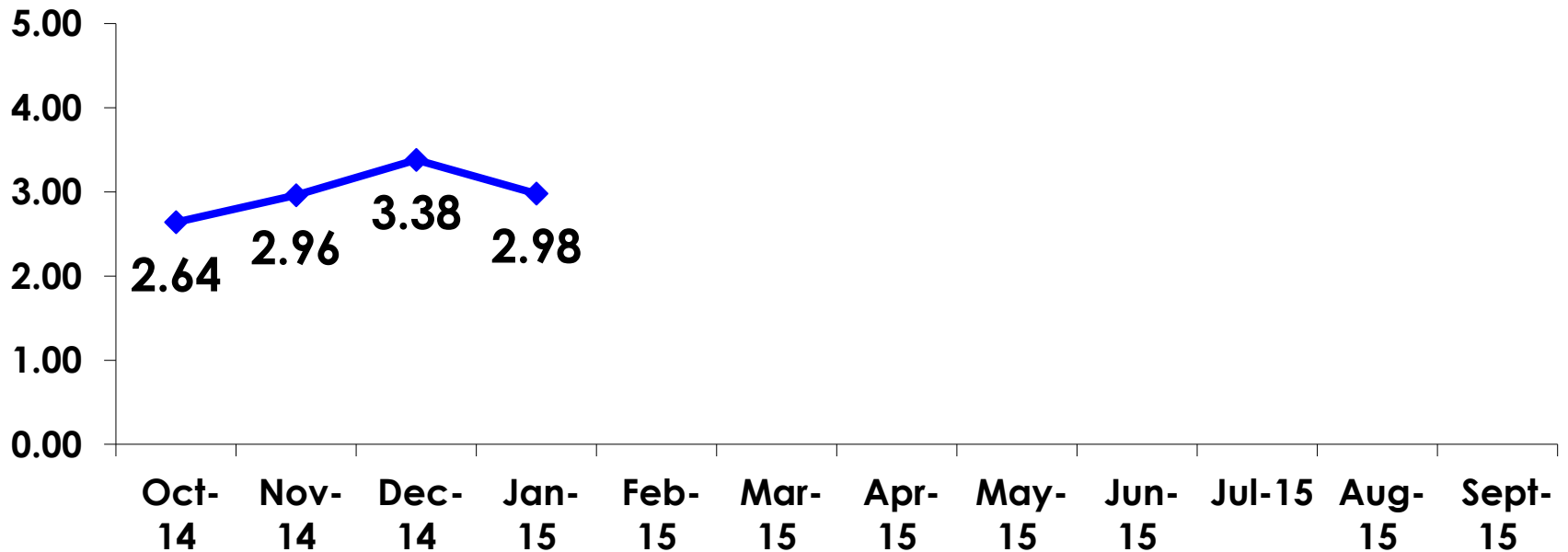


Length of Stay

Mean = 2.98 Days
Median = 3.0 Days



AVG LENGTH OF STAY

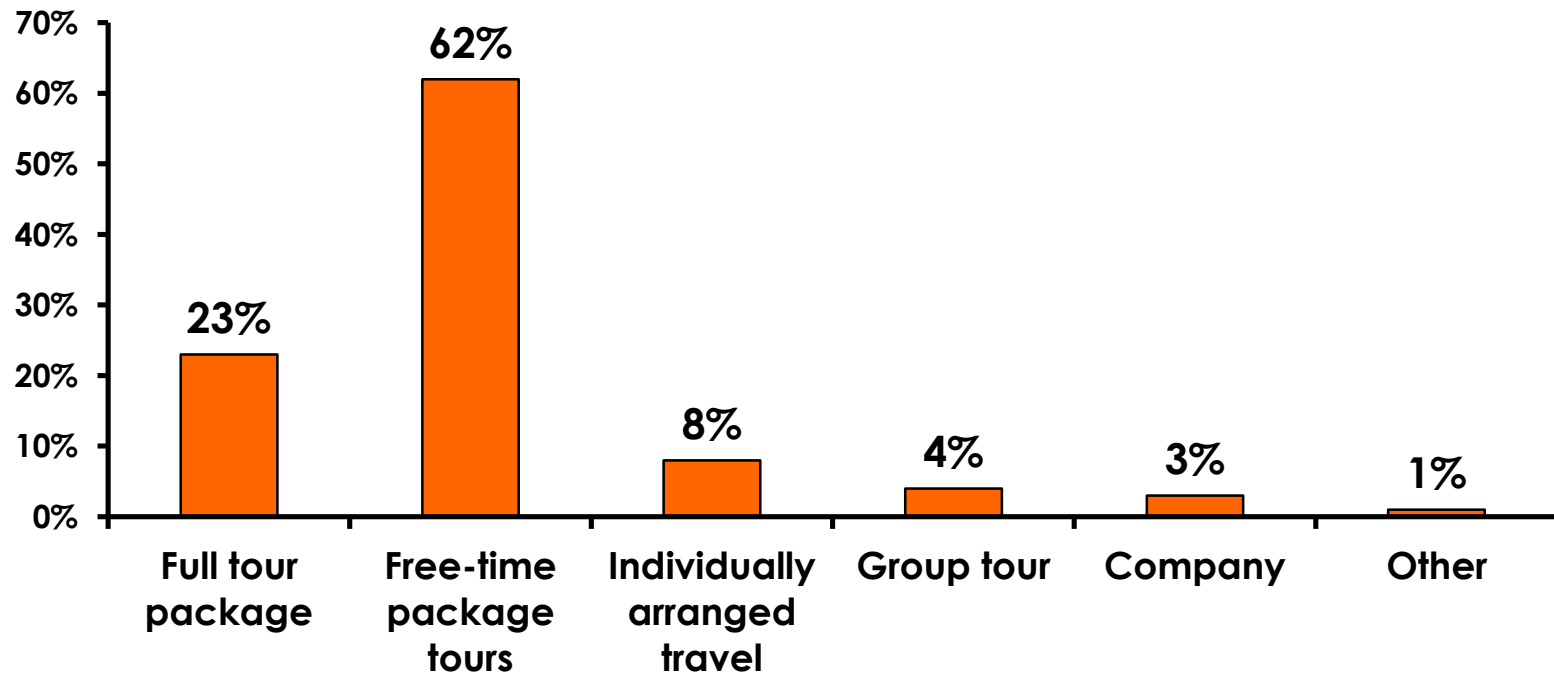


Occupation by Income

		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	19%	14%	24%	36%	19%	12%	18%	13%		
	Self-employed	14%	14%	20%	5%	11%	8%	22%	22%		
	Student	14%	21%	2%	7%	3%	15%	12%	18%	75%	
	Salesperson	11%	7%	16%	12%	25%	15%	4%	2%		
	Engineer	9%	7%	11%	10%	14%	8%	10%	5%		
	Manager	7%			2%		9%	14%	15%		
	Homemaker	5%	7%			8%	9%	4%	7%	25%	
	Teacher	5%		7%	5%		8%	4%	5%		
	Other	4%	14%	4%	2%	8%	6%	2%			
	Professional/ Specialist	3%		2%	10%	3%	3%		3%		
	Skilled worker	2%	7%	2%	5%	3%	3%		2%		
	Govt- office worker non-mgr	2%		2%			3%	6%	2%		
	Executive (30+ employees)	1%		2%		3%	2%		2%		
	Unemployed	1%		4%					2%		
	Retired	1%			2%	3%			2%		
	Freeter	1%	7%		5%						
	Govt- Manager	1%						2%	2%		
	Govt- Executive	0%		2%							
	Total	Count	338	14	45	42	36	66	49	60	4

SECTION 2 **TRAVEL PLANNING**

Travel Planning - Overall

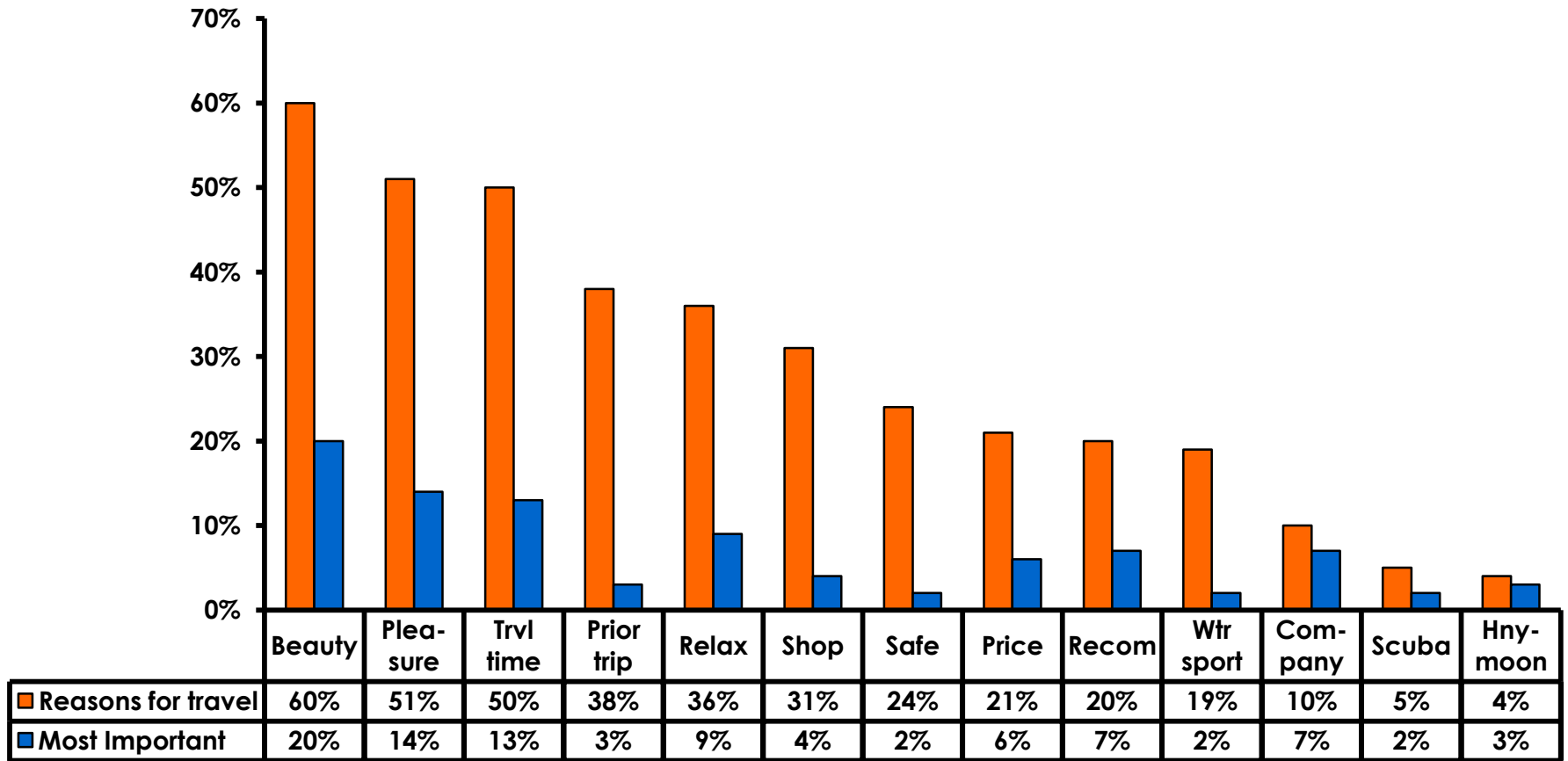


Accommodation by Income

Average length of stay: 2.98 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	18%	15%	20%	24%	14%	15%	16%	17%	50%	
	Guam Reef & Olive Spa	9%	8%	9%	14%	22%	12%	6%	5%		
	Grand Plaza Hotel	8%	15%	16%	7%	3%	3%	10%	8%		
	Hilton Guam Resort	6%	8%		10%	11%	9%	6%	7%		
	Hotel Nikko Guam	6%		2%	5%	8%	9%	8%	2%		
	Fiesta Resort Guam	6%	15%	11%	2%	6%	6%	4%	3%		
	Pacific Bay Hotel	6%	15%	9%	2%	6%	2%	8%	3%	25%	
	Westin Resort Guam	5%		7%			3%	10%	8%		
	Outrigger Guam Resort	5%	8%	2%	7%	6%	8%	2%	5%	25%	
	Royal Orchid Guam	5%	8%	7%	7%	3%	6%	2%	2%		
	Holiday Resort Guam	5%	8%	4%	7%	3%	3%	6%	5%		
	Onward Beach Resort	4%		2%	2%	6%	3%	4%	8%		
	PIC Club	4%		4%	2%	6%	2%	4%	8%		
	Sheraton Laguna Guam	2%			2%		2%		8%		
	Hyatt Regency Guam	2%						6%	3%		
	Leo Palace Resort	2%			5%		3%	4%			
	Other	1%				6%	3%		2%		
	Oceanview Hotel	1%					2%	2%	2%		
	Condo	1%					3%				
	Bayview Hotel	1%		2%			2%		2%		
	Pacific Star Resort & Spa	1%		2%			2%		2%		
	Tumon Bay Capital Hotel	1%					3%				
	Aqua Suites	1%		2%	2%						
	Home stay/ friend/ relative	1%				3%	2%				
	Hotel Santa Fe	0%									
	Lotte Hotel Guam	0%									
	Total	Count	349	13	45	42	36	66	49	60	4

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure,
- 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	60%	62%	59%	54%	72%	58%	63%	
	Pleasure	51%	56%	51%	50%	49%	49%	53%	
	Short travel time	50%	43%	47%	49%	68%	46%	53%	
	Previous trip	38%	22%	28%	54%	49%	39%	37%	
	Relax	36%	36%	38%	34%	38%	33%	40%	
	Shopping	31%	40%	33%	23%	28%	24%	38%	
	Safe	24%	17%	23%	25%	38%	24%	24%	
	Price	21%	30%	24%	17%	15%	21%	22%	
	Recomm- friend/family/trvl agnt	20%	37%	18%	11%	17%	18%	23%	
	Water sports	19%	20%	22%	17%	19%	16%	23%	
	Company/ Business Trip	10%	4%	8%	17%	9%	7%	13%	
	Scuba	5%	10%	2%	5%	6%	6%	4%	
	Honeymoon	4%	2%	7%	4%		6%	2%	
	Golf	4%		3%	5%	13%	4%	4%	
	Other	3%	2%	2%	2%	13%	5%	2%	
	Married/ Attn wedding	3%	1%	4%	4%	2%	3%	2%	
	Visit friends/ Relatives	3%	6%	2%	1%	2%	3%	2%	
	Organized sports	1%	4%					2%	
	Career Cert/ Testing	0%	1%					1%	
	Total	Count	349	81	110	109	47	181	168

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	60%	57%	59%	62%	50%	59%	55%	65%	50%	
	Pleasure	51%	50%	68%	45%	39%	50%	47%	58%	50%	
	Short travel time	50%	43%	57%	36%	42%	42%	55%	62%	25%	
	Previous trip	38%	36%	27%	38%	44%	38%	41%	42%	25%	
	Relax	36%	21%	48%	36%	28%	32%	29%	47%		
	Shopping	31%	21%	48%	33%	17%	24%	22%	35%		
	Safe	24%	36%	23%	19%	19%	21%	24%	32%		
	Price	21%	21%	25%	26%	19%	21%	24%	18%	25%	
	Recomm- friend/family/trvl agnt	20%	29%	30%	21%	14%	11%	16%	22%	75%	
	Water sports	19%	7%	25%	31%	3%	21%	18%	18%		
	Company/ Business Trip	10%		11%	24%	14%	14%	6%	2%		
	Scuba	5%	7%	5%	5%	6%	5%	10%	3%		
	Honeymoon	4%	7%	7%	2%		9%	6%			
	Golf	4%				3%	3%	2%	15%		
	Other	3%	7%	2%		6%	2%	4%	7%		
	Married/ Attn wedding	3%	7%	5%		3%	2%	4%	3%		
	Visit friends/ Relatives	3%	7%	2%	2%	3%		4%	2%		
	Organized sports	1%		2%	5%						
	Career Cert/ Testing	0%		2%							
	Total	Count	349	14	44	42	36	66	49	60	4

SECTION 3 **EXPENDITURES**

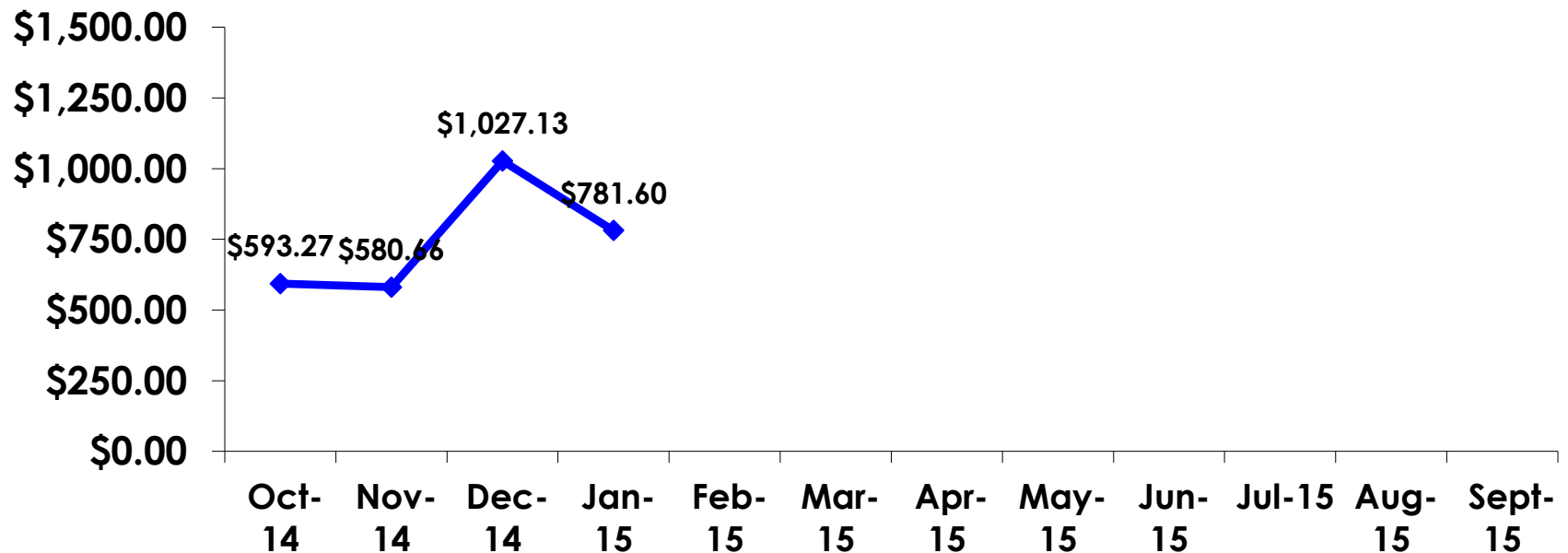
Prepaid Expenditures

¥118.53/US\$1

- \$1,754.49 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$16,873 = maximum (highest amount recorded for the entire sample)
- \$781.60 = overall mean average per person prepaid expenditures

PREPAID EXPENDITURES

Per Person



YTD=\$745.87

Breakdown of Prepaid Expenditures

¥118.53=\$1

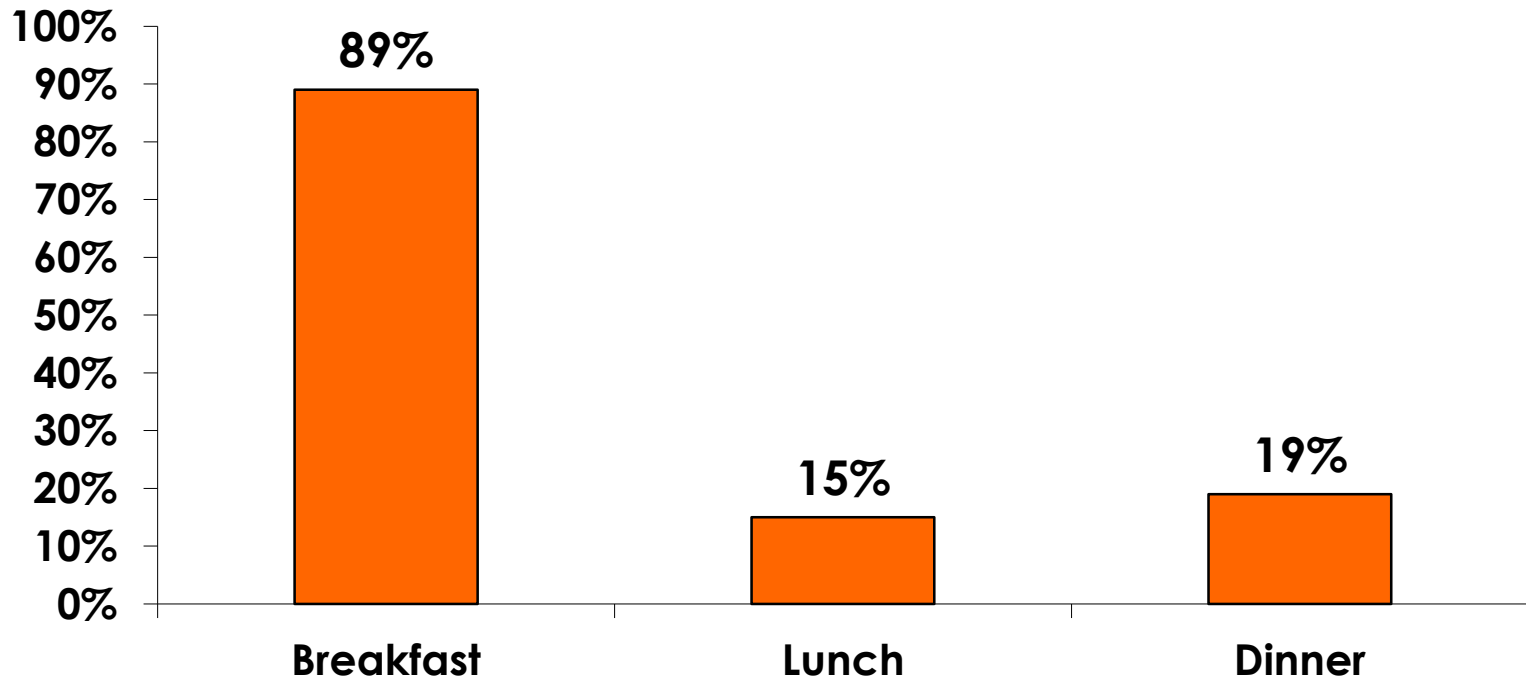
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,852.04
Air & Accommodation w/ daily meal package	\$2,922.84
Air only	\$1,272.42
Accommodation only	\$551.20
Accommodation w/ daily meal only	\$674.93
Food & Beverages in Hotel	\$885.85
Ground transportation – Japan	\$51.45
Ground transportation – Guam	\$39.65
Optional tours/ activities	\$275.47
Other expenses	\$190.44
Total Prepaid	\$1,754.49

PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg.

n=27

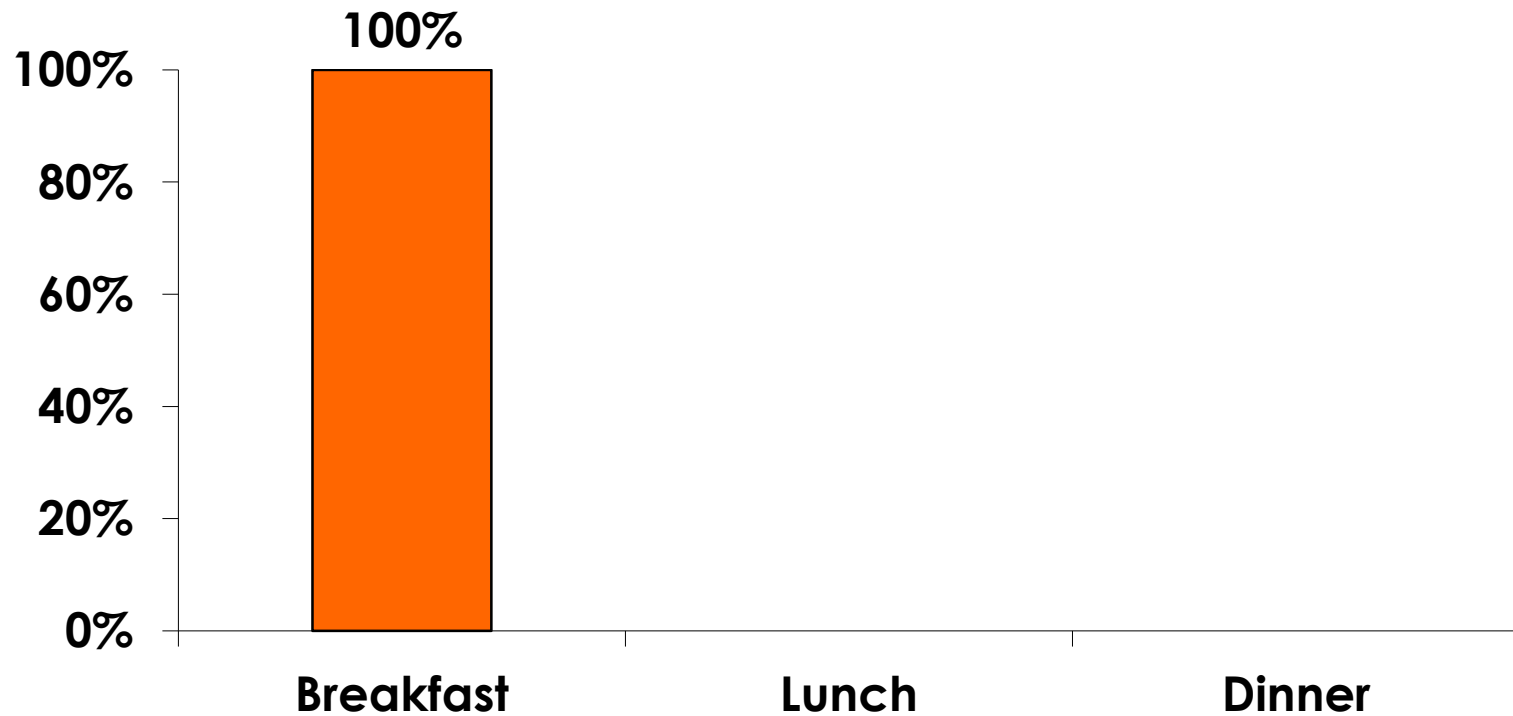


Mean=\$2,922.84 per travel party

PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg.

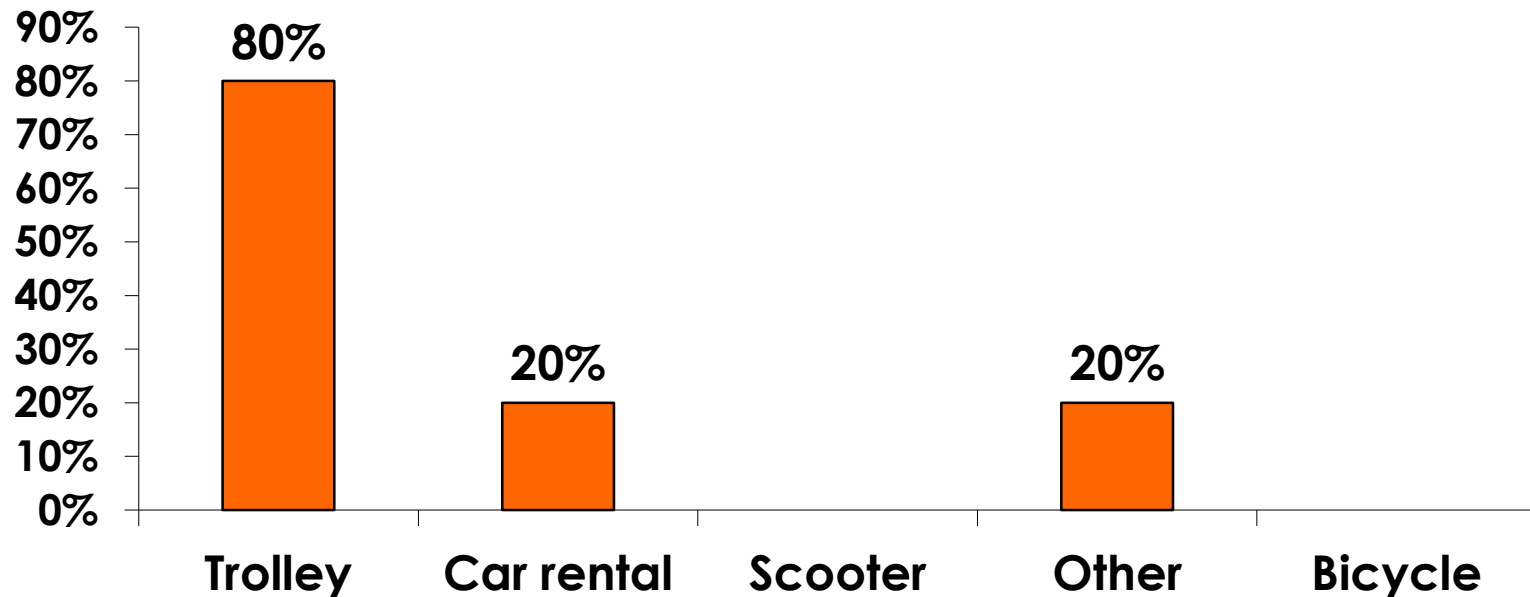
n=4



Mean=\$674.93 per travel party

PREPAID GROUND TRANSPORTATION

n=5



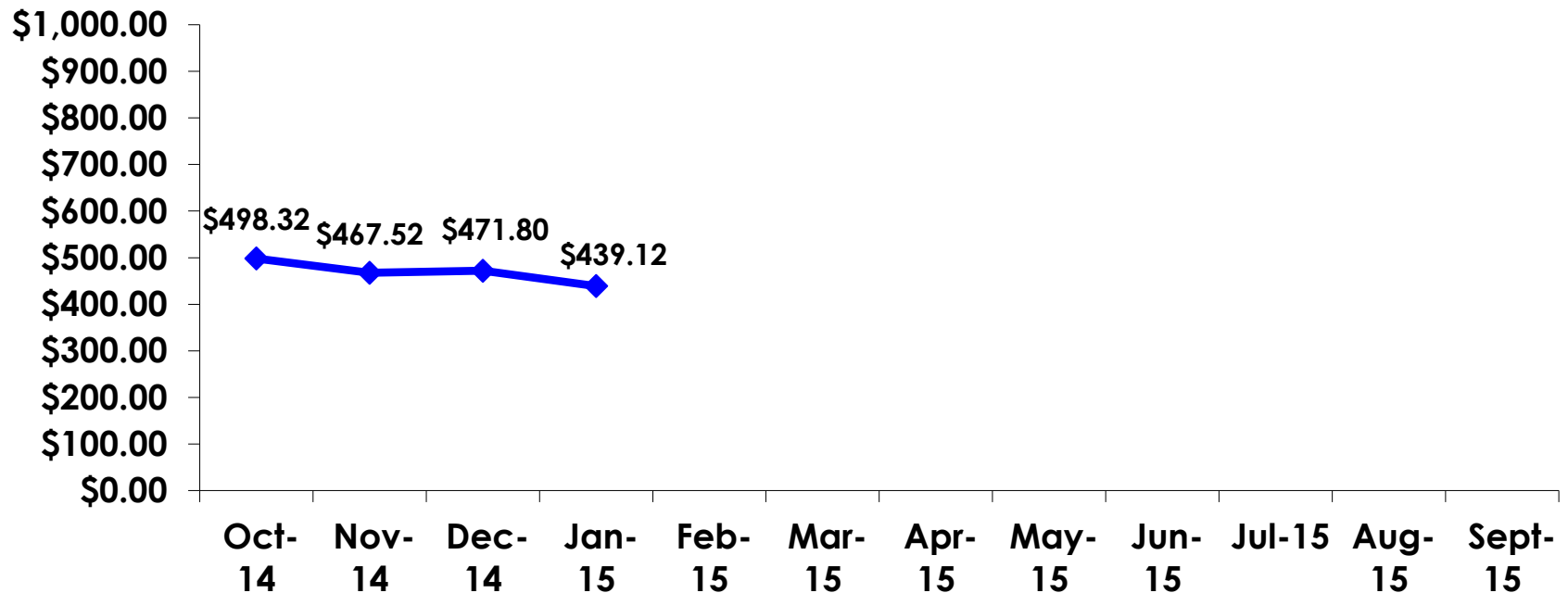
Mean=\$39.65 per travel party

On-Island Expenditures

- \$778.65 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$10,000 = Maximum (highest amount recorded for the entire sample)
- \$439.12 = overall mean average per person on-island expenditure

ON-ISLAND EXPENDITURES

Per Person

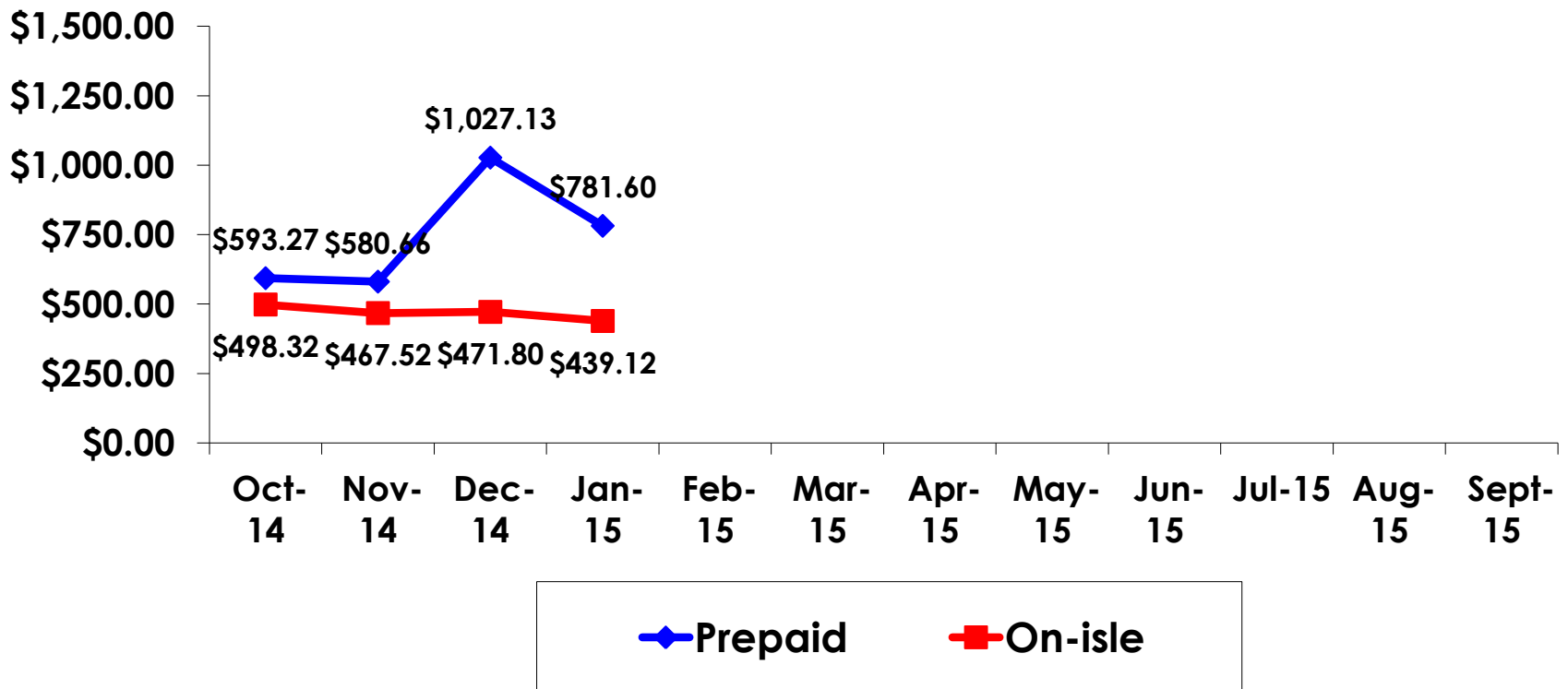


YTD = \$469.19

PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$745.87

On-Isle YTD = \$469.19



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
					AGE				AGE			
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$439.12	\$422.63	\$456.99	\$435.50	\$375.59	\$447.07	\$442.38	\$424.86	\$526.74	\$390.31	\$503.00
	Median	\$324	\$333	\$308	\$375	\$300	\$329	\$333	\$300	\$400	\$317	\$450
	Minimum	\$0	\$0	\$0	\$147	\$0	\$0	\$0	\$0	\$0	\$0	\$117
	Maximum	\$3,000	\$2,515	\$3,000	\$1,500	\$2,515	\$2,000	\$1,750	\$2,724	\$3,000	\$2,000	\$1,100

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$46.89	\$44.46	\$49.54	\$32.31	\$19.81	\$76.63	\$69.02
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$38.40	\$36.47	\$40.50	\$39.23	\$22.25	\$52.94	\$43.02
	Median	\$0	\$0	\$0	\$10	\$0	\$0	\$0
F&B RESTRNT	Mean	\$92.47	\$80.85	\$105.05	\$73.33	\$84.29	\$124.82	\$73.68
	Median	\$0	\$0	\$0	\$10	\$20	\$0	\$0
OPT TOUR	Mean	\$88.31	\$75.12	\$102.60	\$59.48	\$51.46	\$118.38	\$159.04
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$142.74	\$146.59	\$138.57	\$102.21	\$148.07	\$174.21	\$133.09
	Median	\$0	\$0	\$0	\$0	\$20	\$0	\$0
GIFT- OTHER	Mean	\$134.01	\$137.48	\$130.26	\$91.62	\$110.05	\$156.96	\$216.17
	Median	\$40	\$20	\$50	\$30	\$40	\$50	\$50
TRANS	Mean	\$14.87	\$19.36	\$10.00	\$6.06	\$12.90	\$18.77	\$26.28
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$209.40	\$236.38	\$180.17	\$129.33	\$195.34	\$236.56	\$281.81
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$50
TOTAL	Mean	\$778.65	\$807.09	\$747.85	\$545.93	\$632.24	\$999.92	\$1,000.83
	Median	\$500	\$500	\$473	\$300	\$490	\$700	\$800

On-Island Expenditures

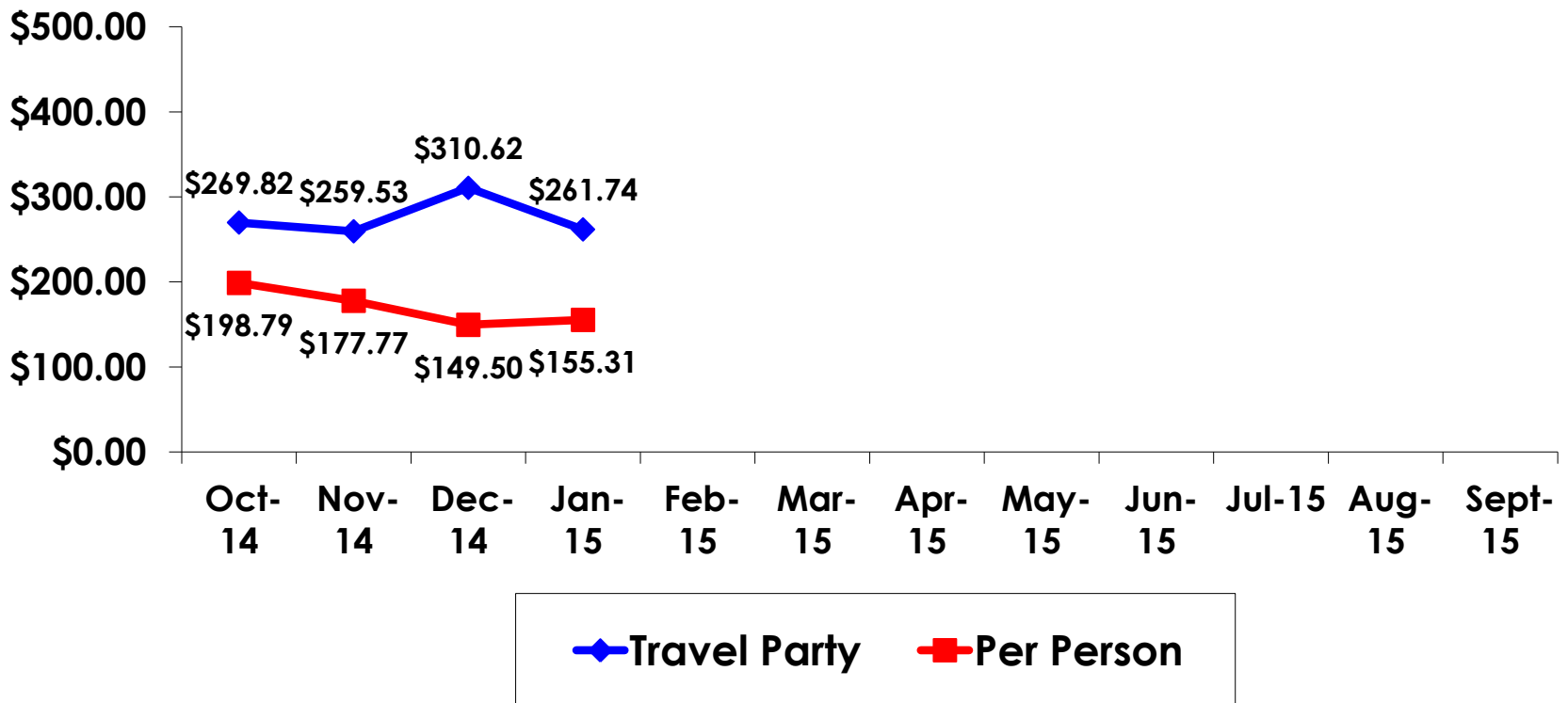
First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$46.89	\$38.59	\$55.64
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$38.40	\$41.31	\$35.97
	Median	\$0	\$10	\$0
F&B RESTRNT	Mean	\$92.47	\$79.28	\$106.57
	Median	\$0	\$0	\$0
OPT TOUR	Mean	\$88.31	\$89.80	\$87.85
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$142.74	\$151.91	\$135.31
	Median	\$0	\$10	\$0
GIFT- OTHER	Mean	\$134.01	\$135.06	\$134.51
	Median	\$40	\$40	\$40
TRANS	Mean	\$14.87	\$12.78	\$17.10
	Median	\$0	\$0	\$0
OTHER	Mean	\$209.40	\$145.53	\$269.22
	Median	\$0	\$0	\$0
TOTAL	Mean	\$778.65	\$713.18	\$846.57
	Median	\$500	\$400	\$600

ON-ISLE EXPENDITURES – Per Day

Travel Party YTD = \$275.44

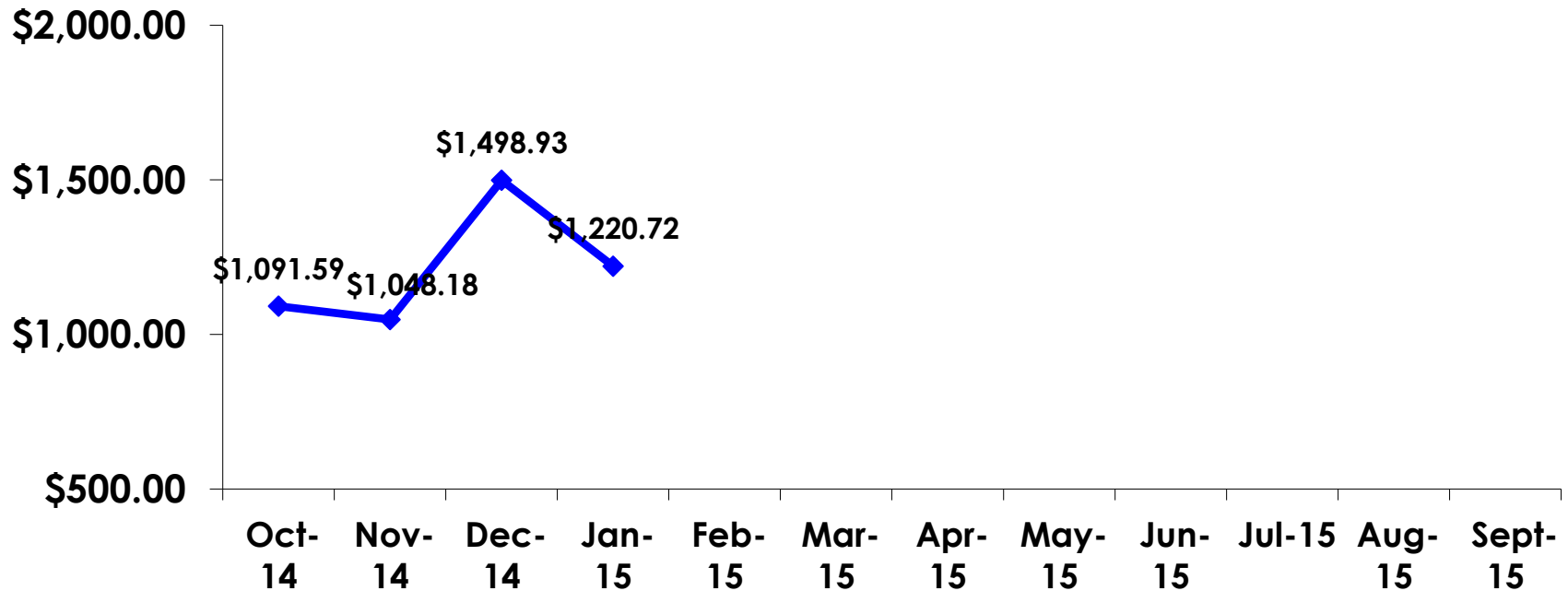
Per Person YTD = \$170.34



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,220.72 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,242 = Maximum (highest amount recorded for the entire sample)

TOTAL EXPENDITURES Per Person



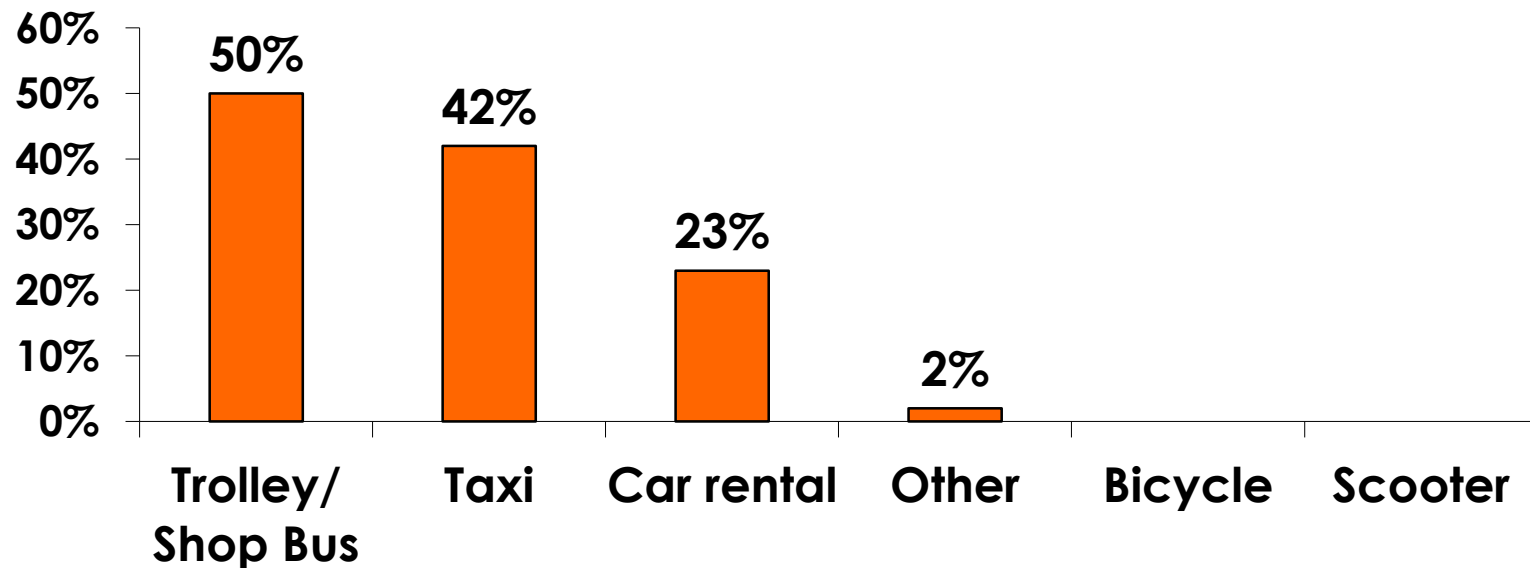
YTD=\$1,215.06

Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$46.89
Food & beverage in fast food restaurant/convenience store	\$38.40
Food & beverage at restaurants or drinking establishments outside a hotel	\$92.47
Optional tours and activities	\$88.31
Gifts/ souvenirs for yourself/companions	\$142.74
Gifts/ souvenirs for friends/family at home	\$134.01
Local transportation	\$14.87
Other expenses not covered	\$209.40
Average Total	\$778.65

Local Transportation

n=66



Mean=\$14.87 per travel party

Guam Airport Expenditures

- \$37.07 = Mean
- \$10 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$2,000 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

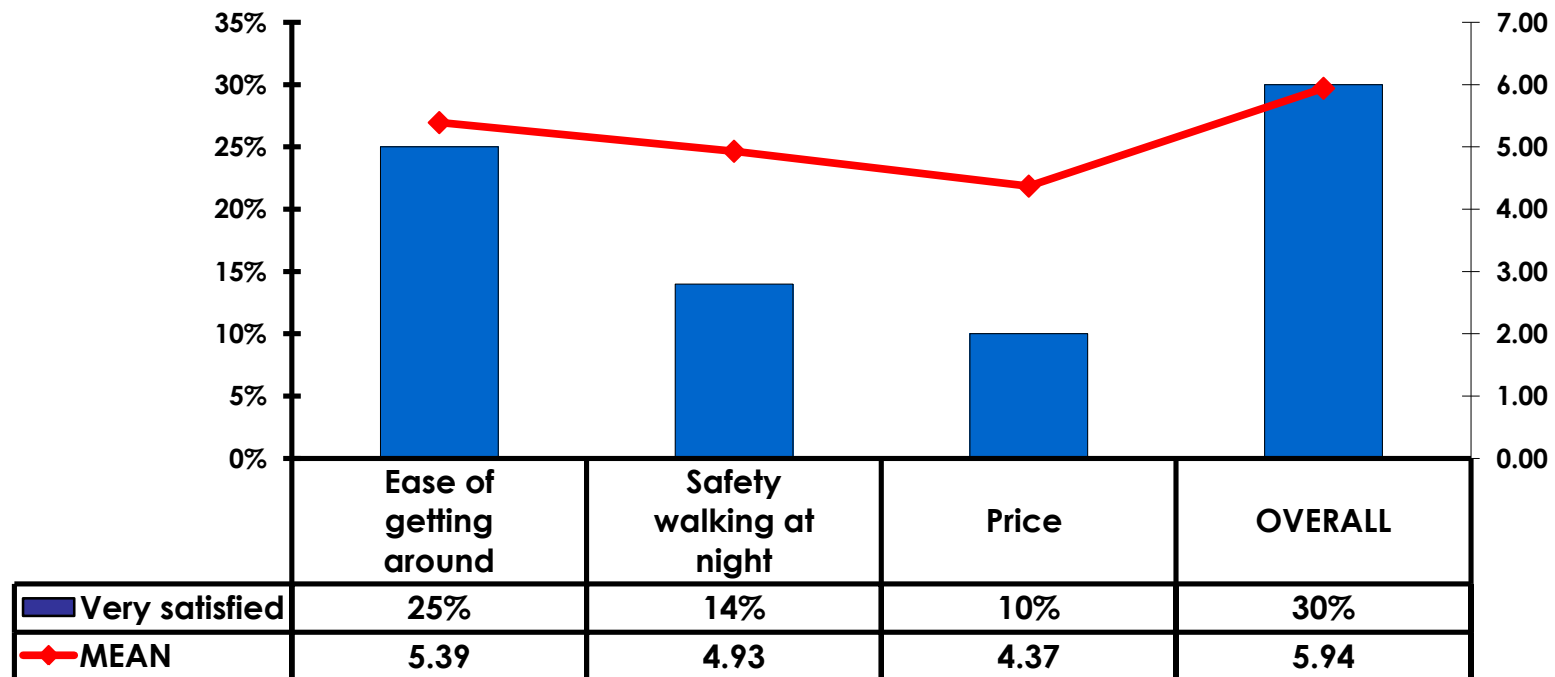
	MEAN \$
Food & Beverages	\$9.31
Gifts/Souvenirs Self	\$12.34
Gifts/Souvenirs Others	\$15.13
Total	\$37.07

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

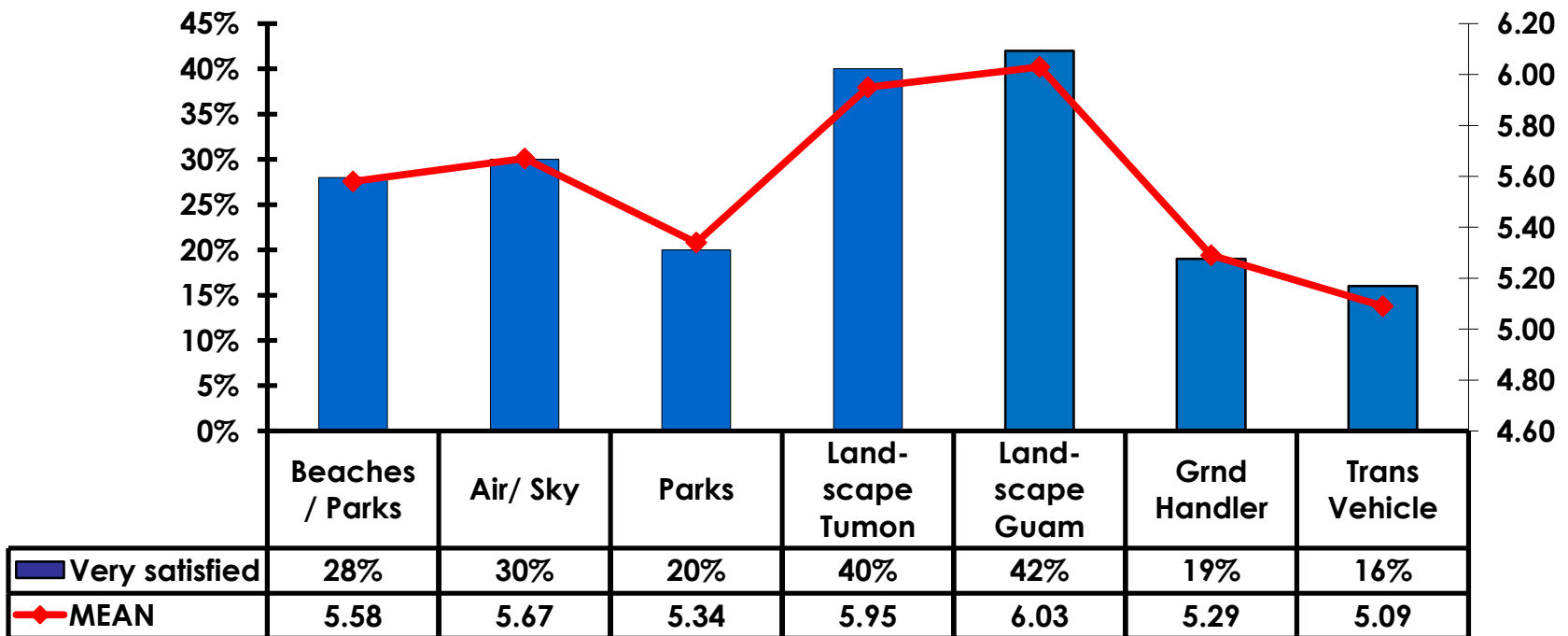
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

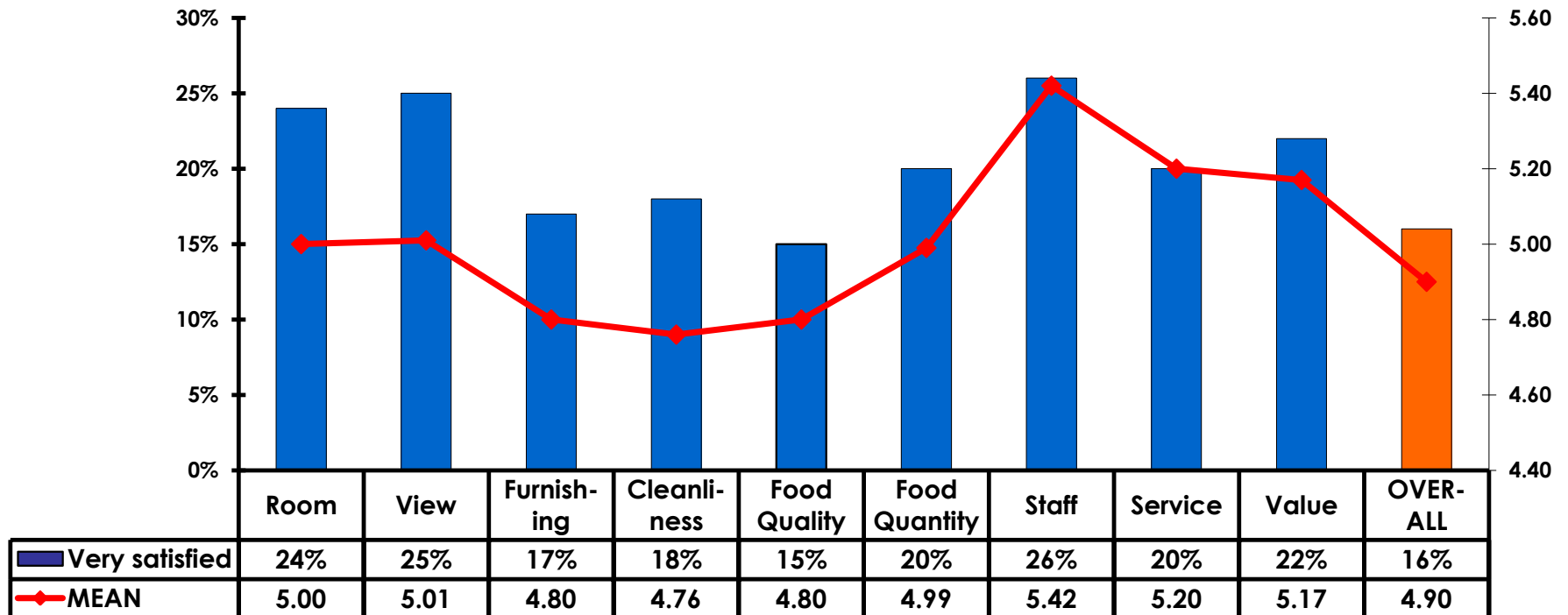
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

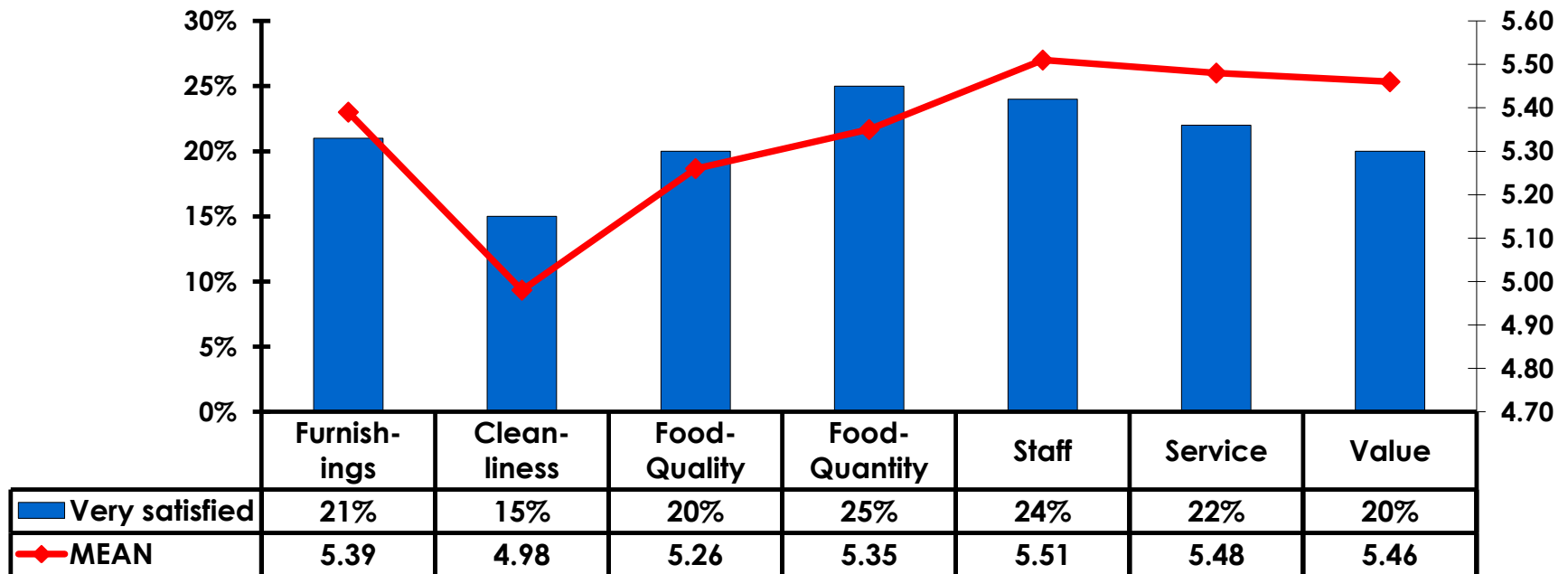
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

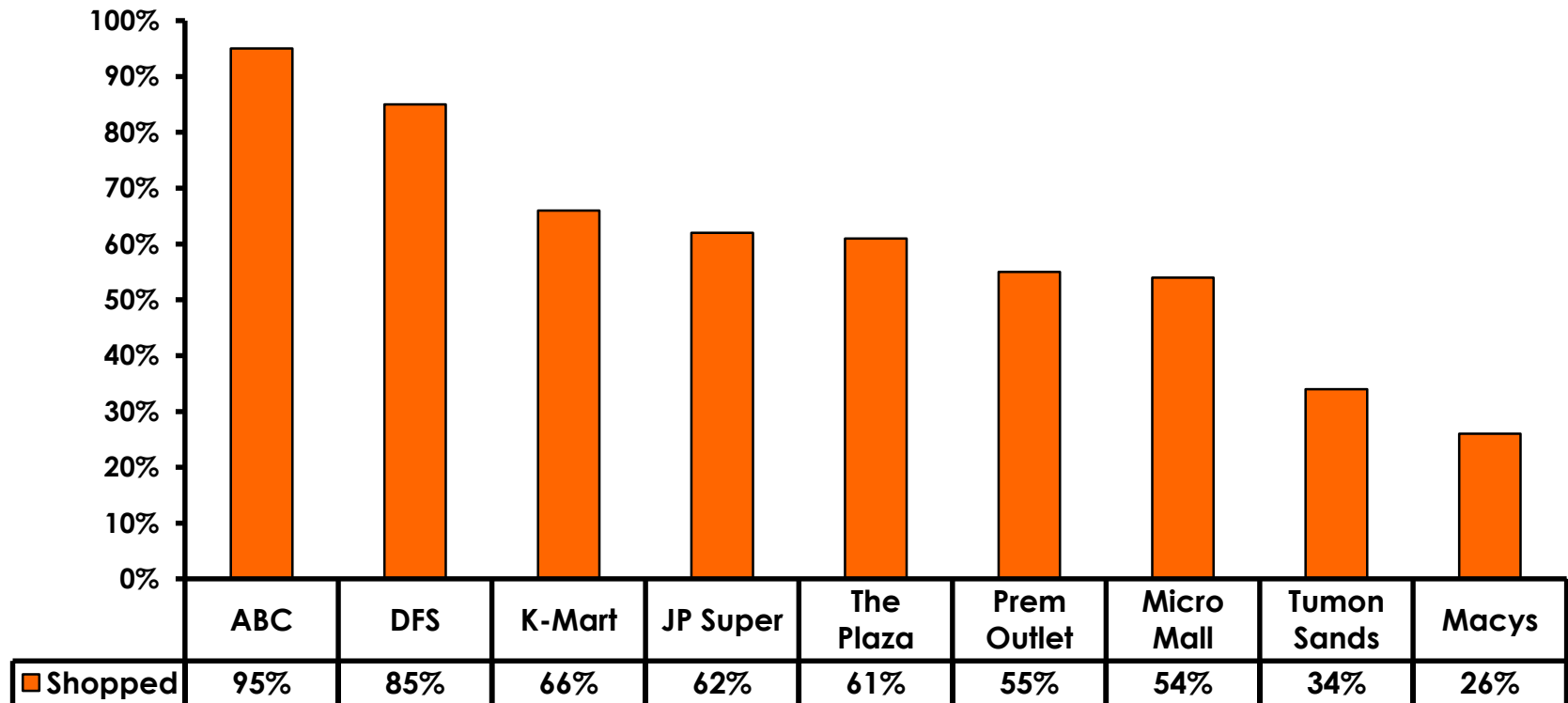
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



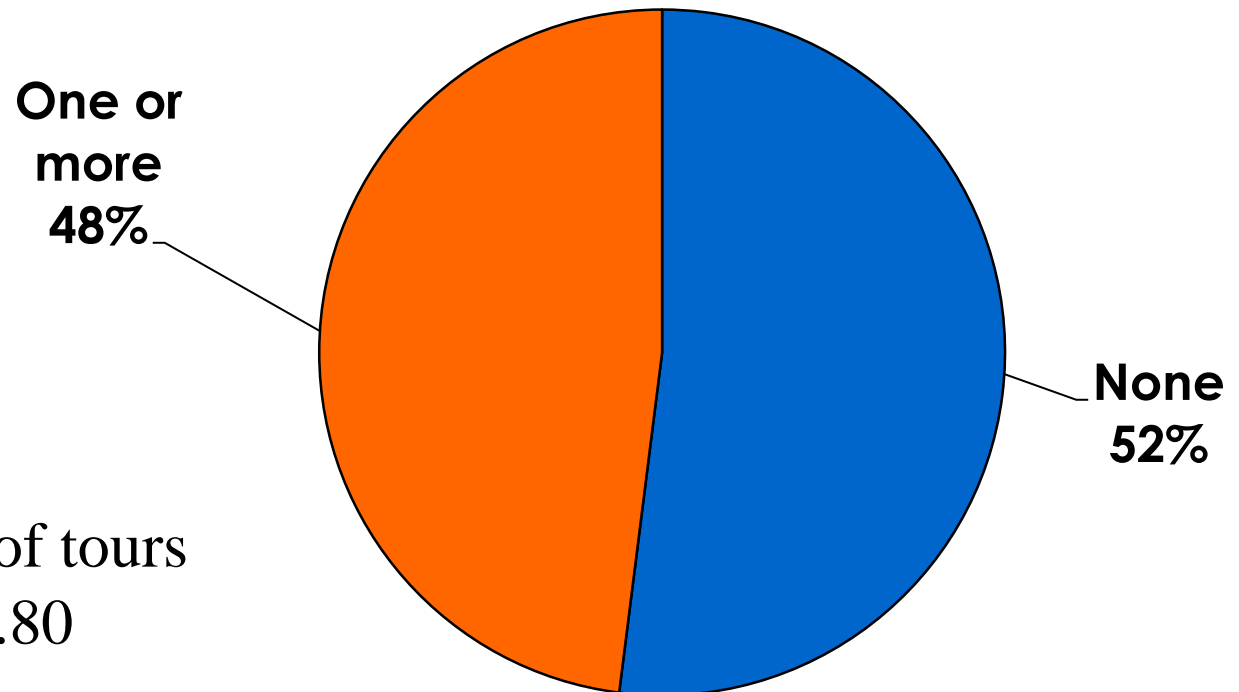
Satisfaction with Shopping

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

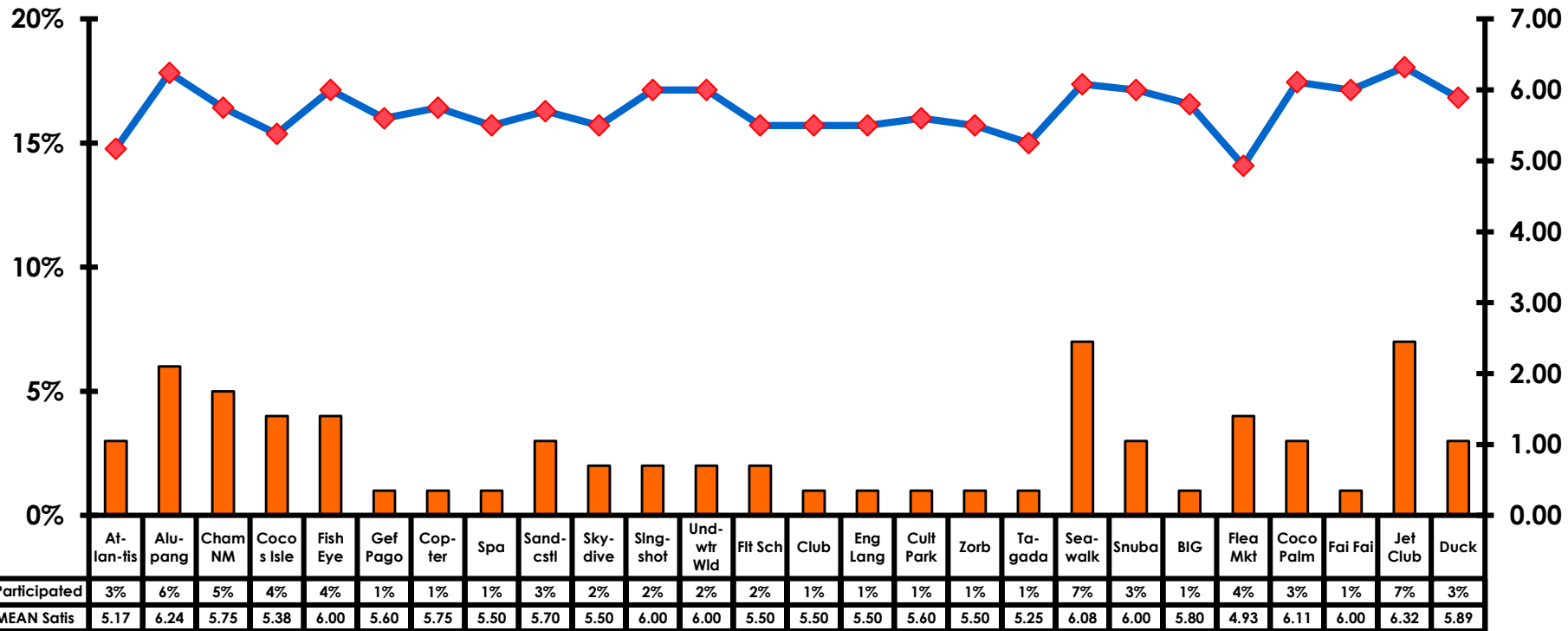
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 47%	Score of 6 to 7 = 47%
Score of 4 to 5 = 46%	Score of 4 to 5 = 44%
Score 1 to 3 = 7%	Score 1 to 3 = 9%
MEAN = 5.26	MEAN = 5.18

Optional Tour Participation



- Average number of tours participated in is .80

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 = 55%	Score of 6 to 7 = 52%
Score of 4 to 5 = 44%	Score of 4 to 5 = 47%
Score 1 to 3 = 0%	Score 1 to 3 = 1%
MEAN = 5.49	MEAN = 5.40

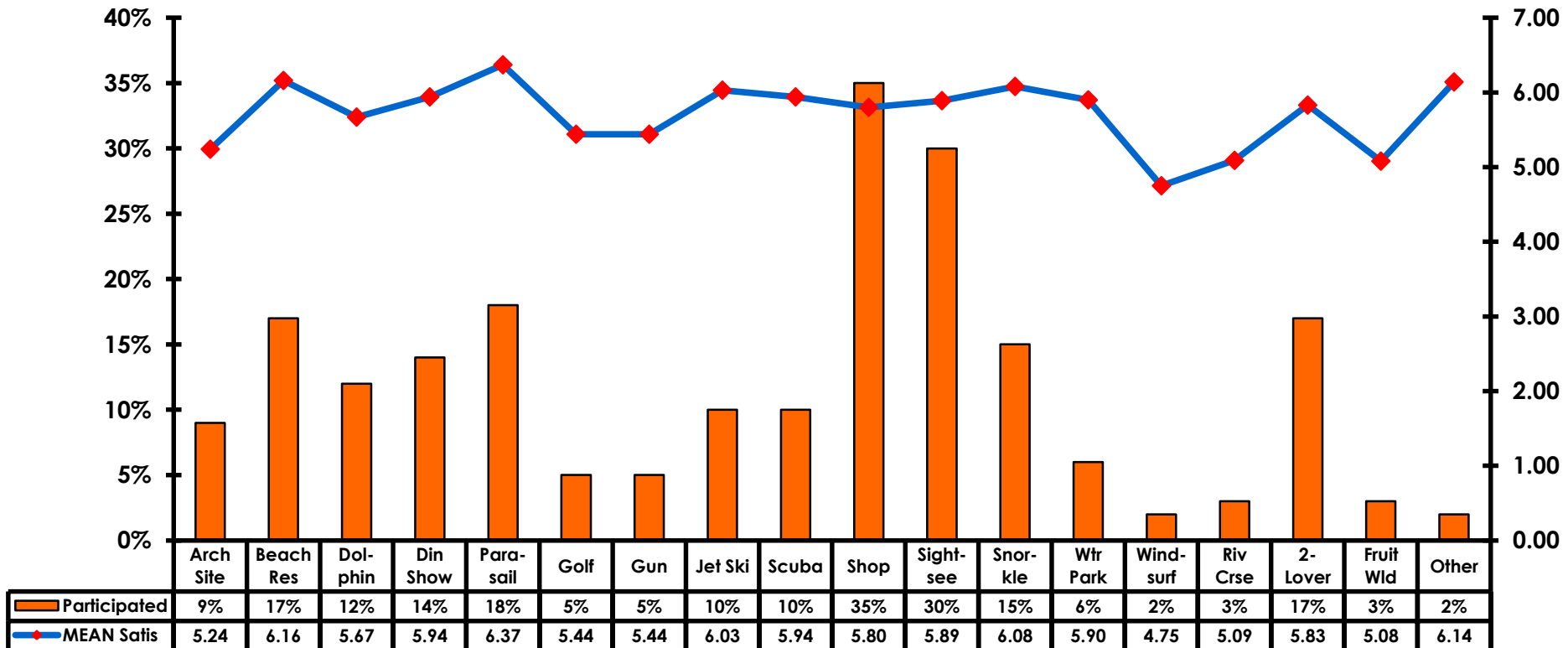
Night Tours Satisfaction

7pt Rating Scale

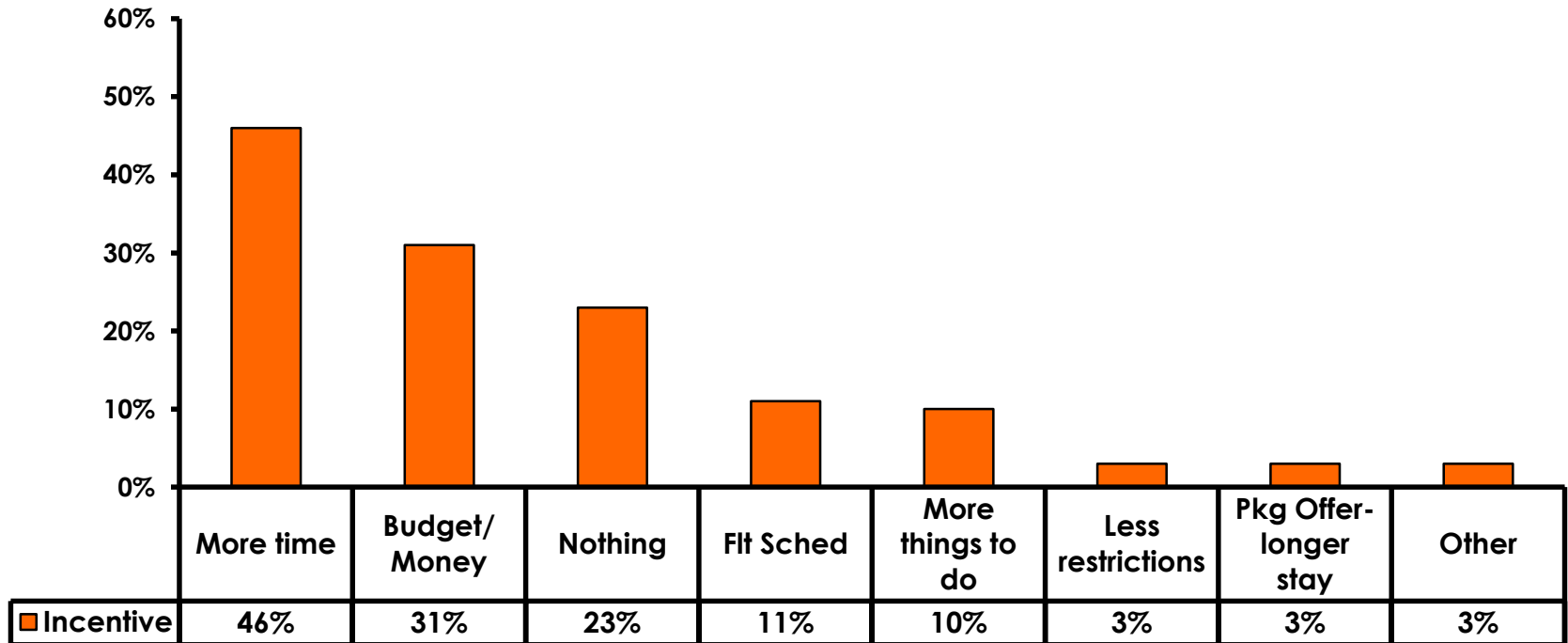
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 28%	Score of 6 to 7 = 29%
Score of 4 to 5 = 70%	Score of 4 to 5 = 66%
Score 1 to 3 = 2%	Score 1 to 3 = 5%
MEAN = 4.75	MEAN = 4.75

Satisfaction with Other Activities



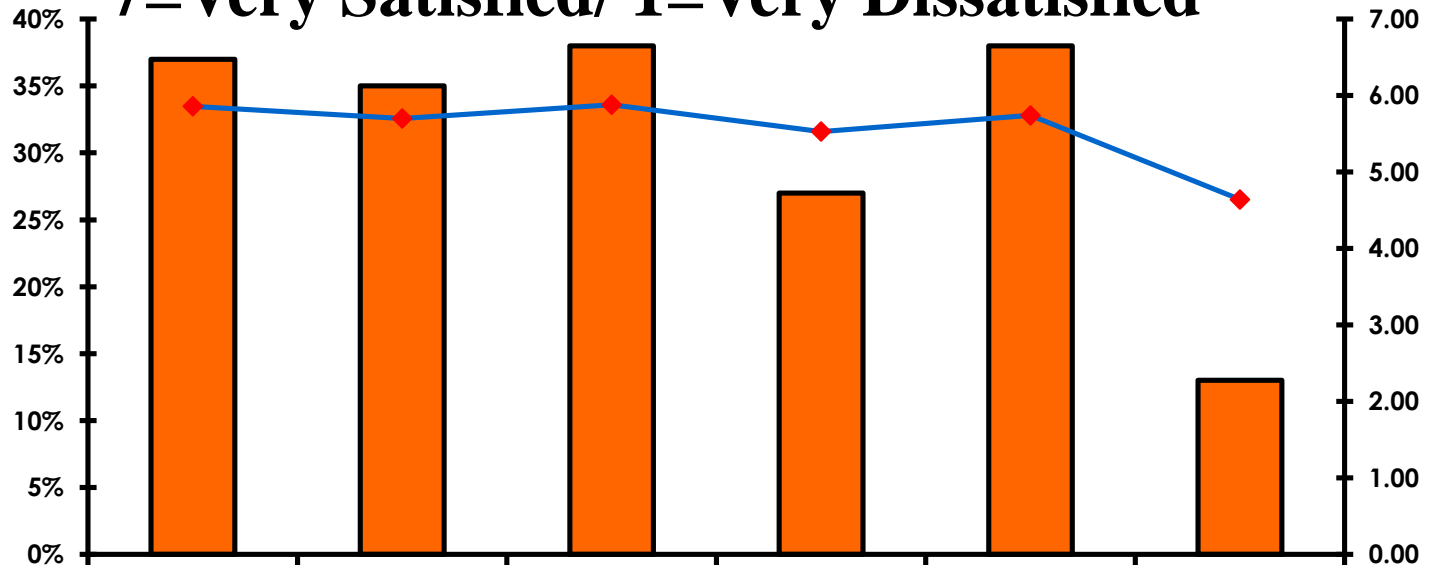
What would it take to make you want to stay an extra day in Guam?





On-Island Perceptions

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

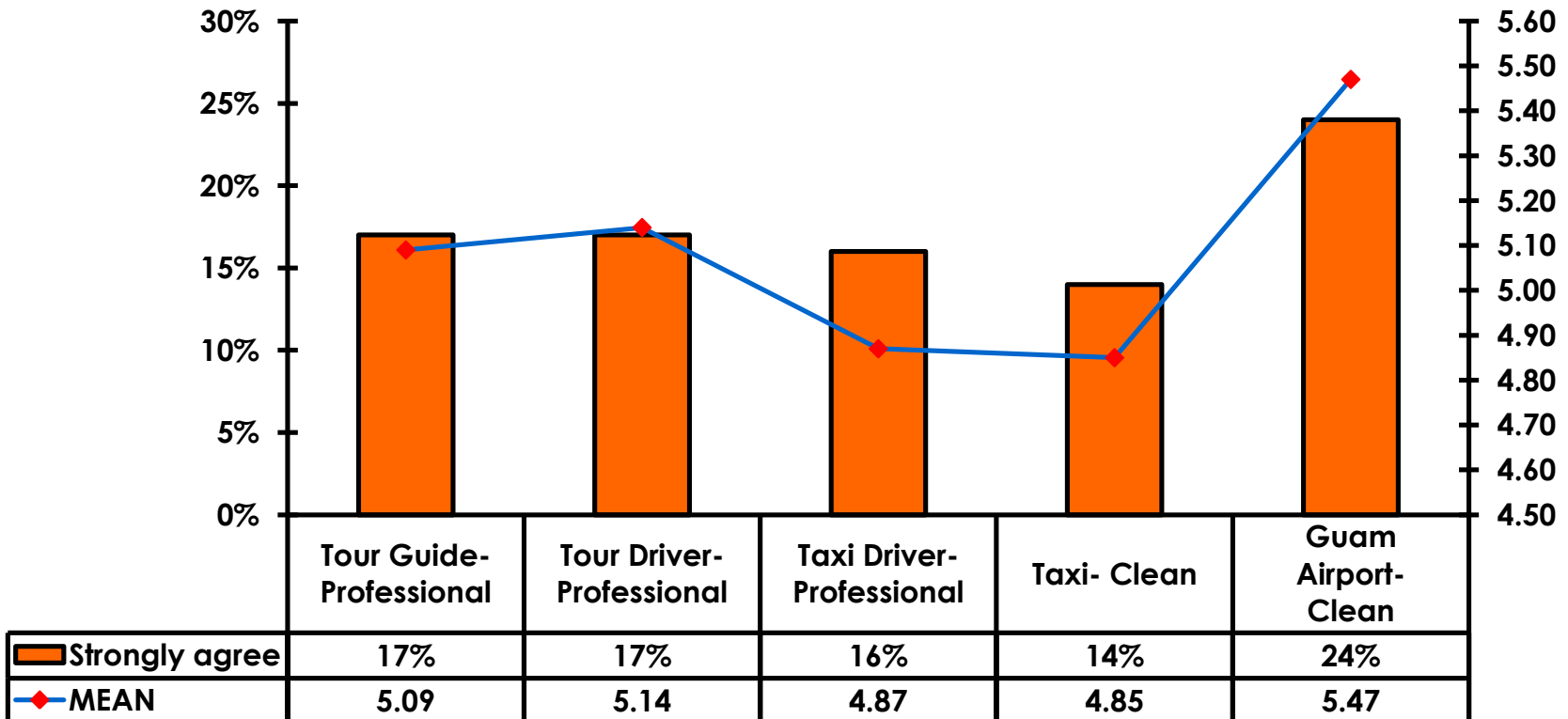


 Strongly agree	37%	35%	38%	27%	38%	13%
 MEAN	5.86	5.70	5.88	5.53	5.74	4.64

On-Island Perceptions

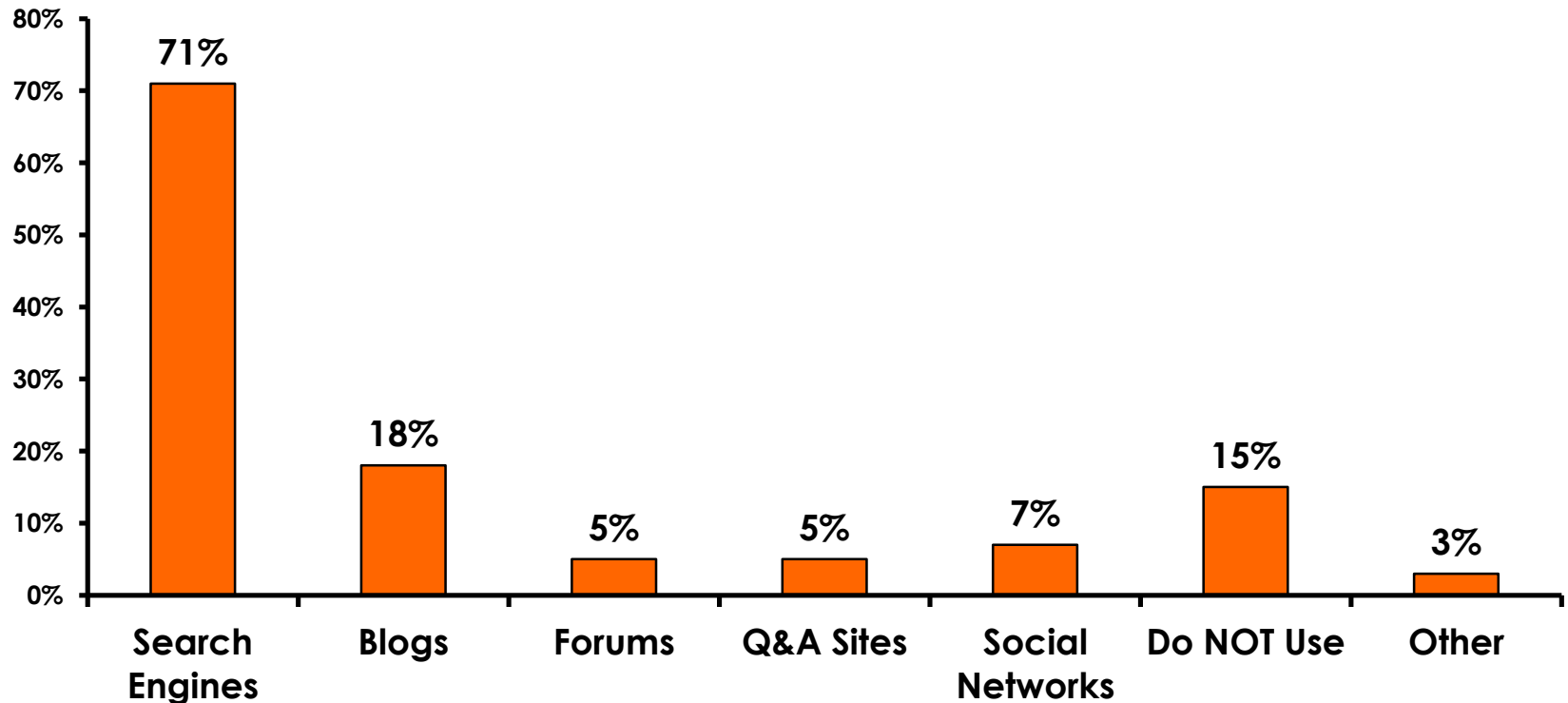
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



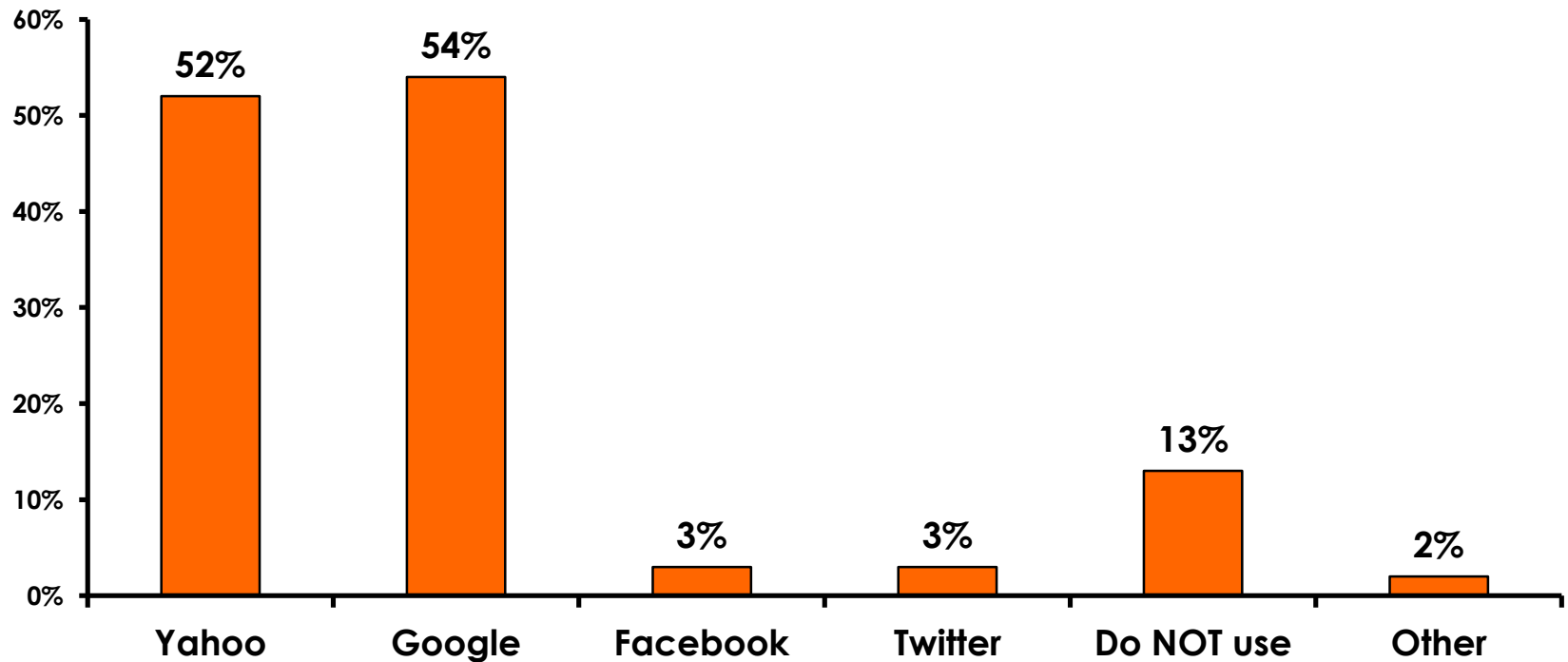
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

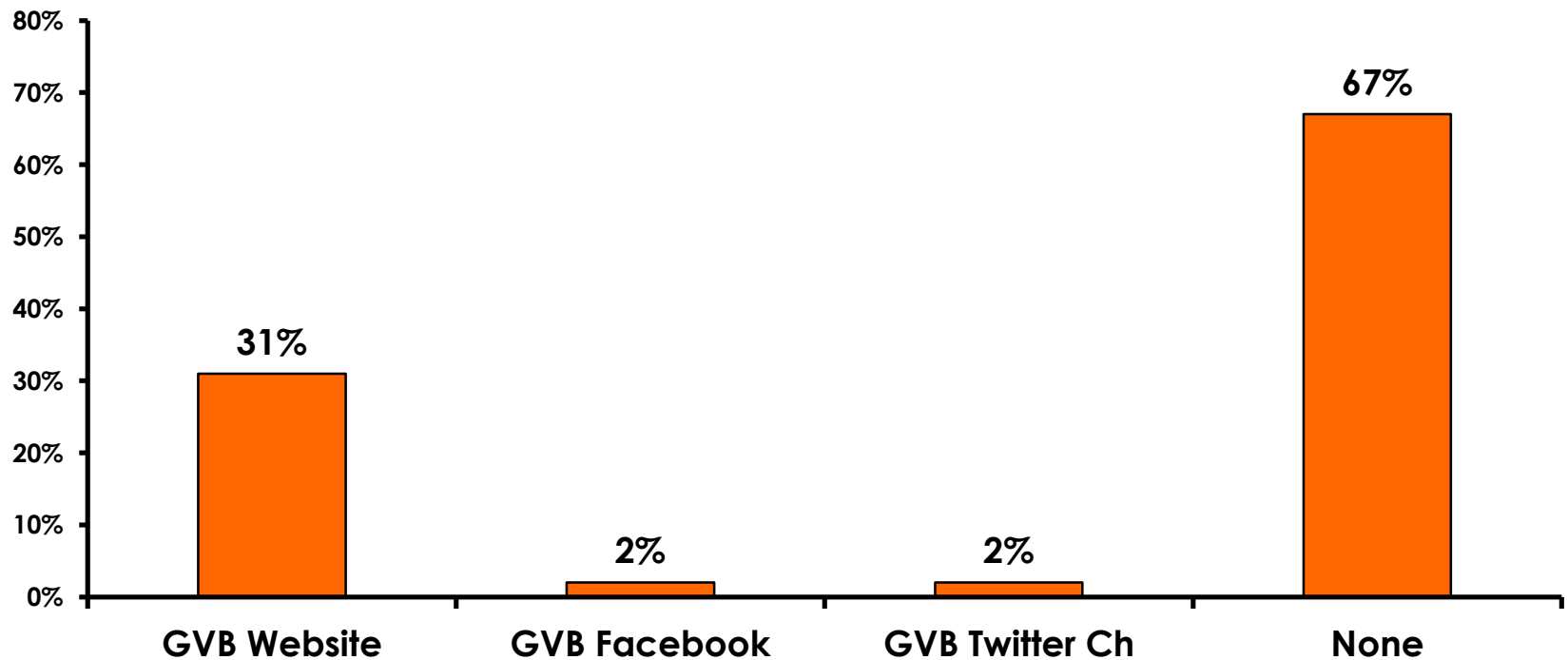


Internet- Things To Do

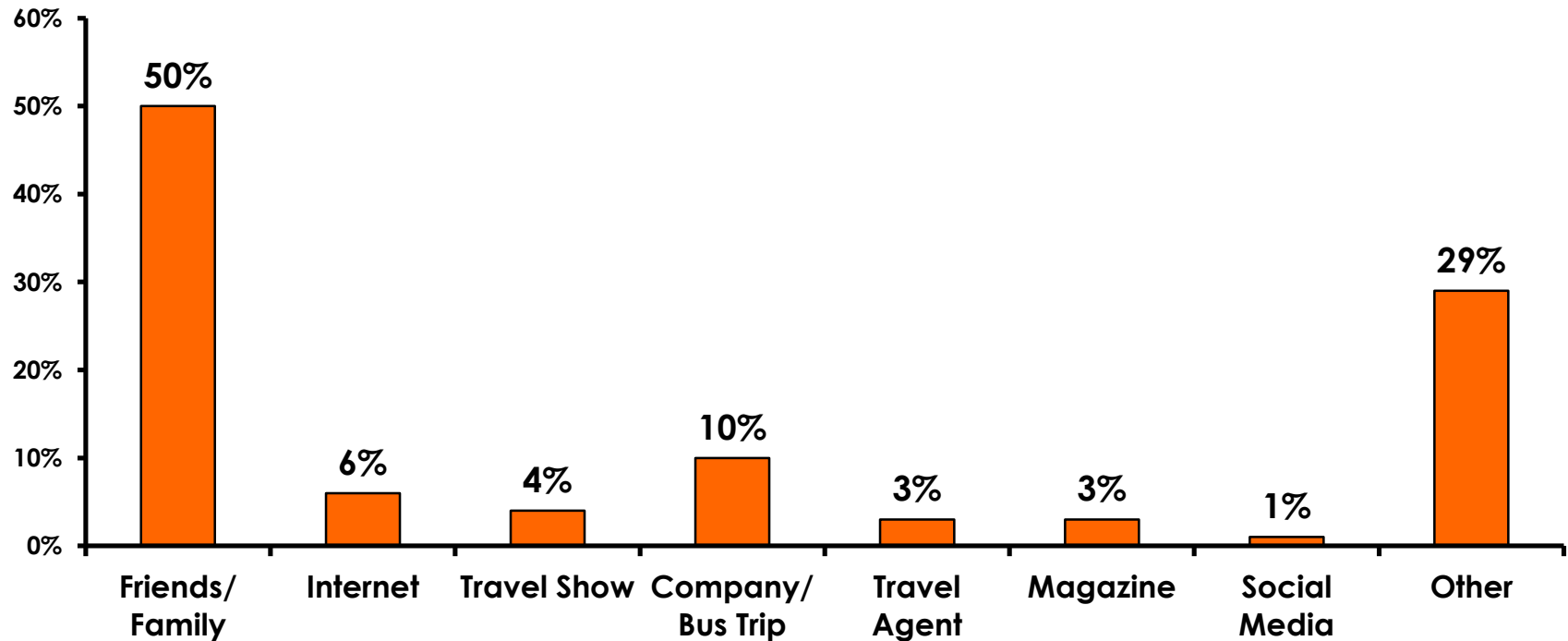
Sources of Info



Internet- GVB Sources

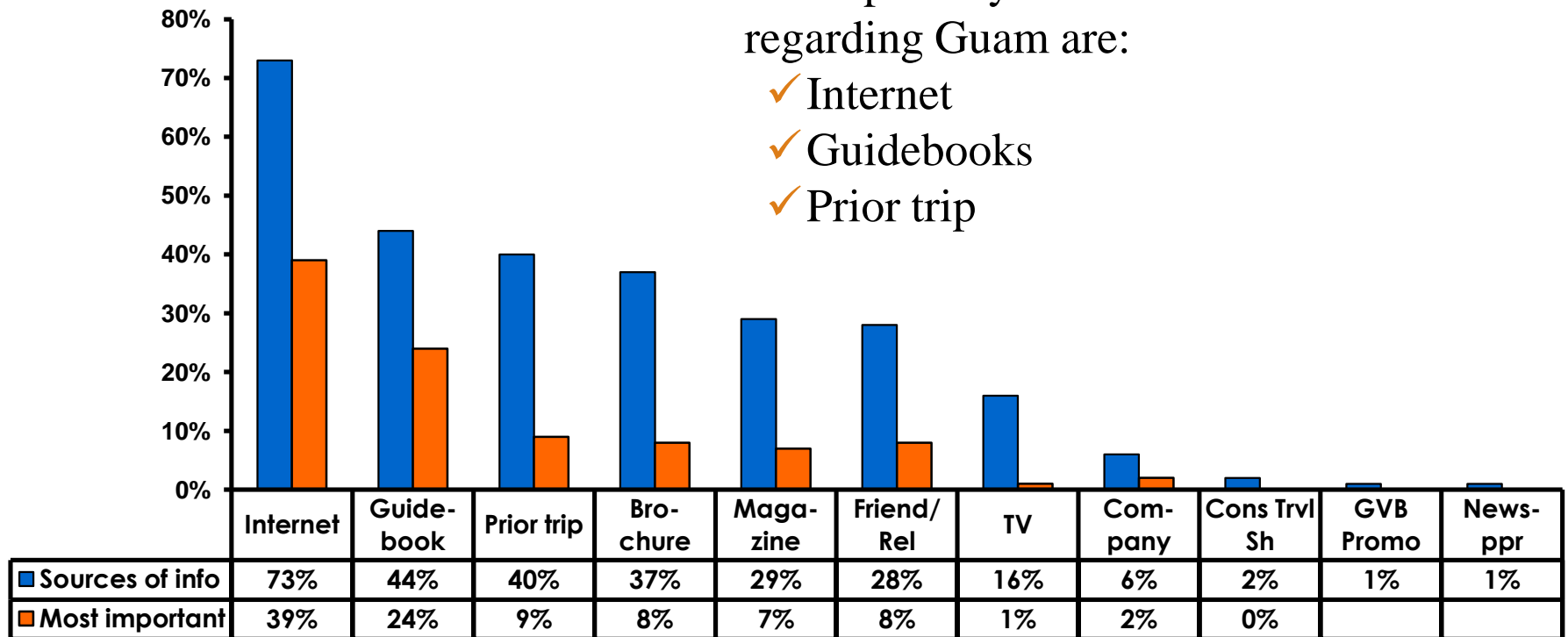


Travel Motivation- Info Sources



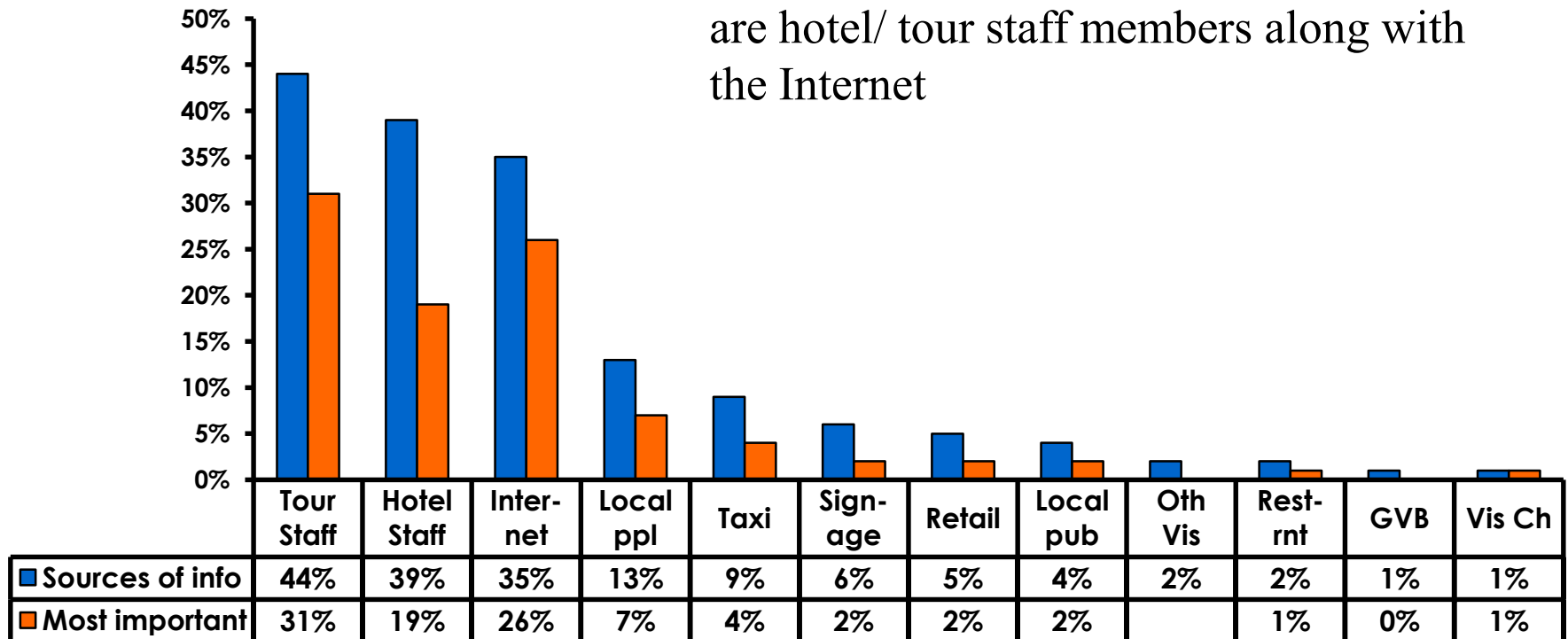
Sources of Information Pre-arrival

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



Sources of Information Post-arrival

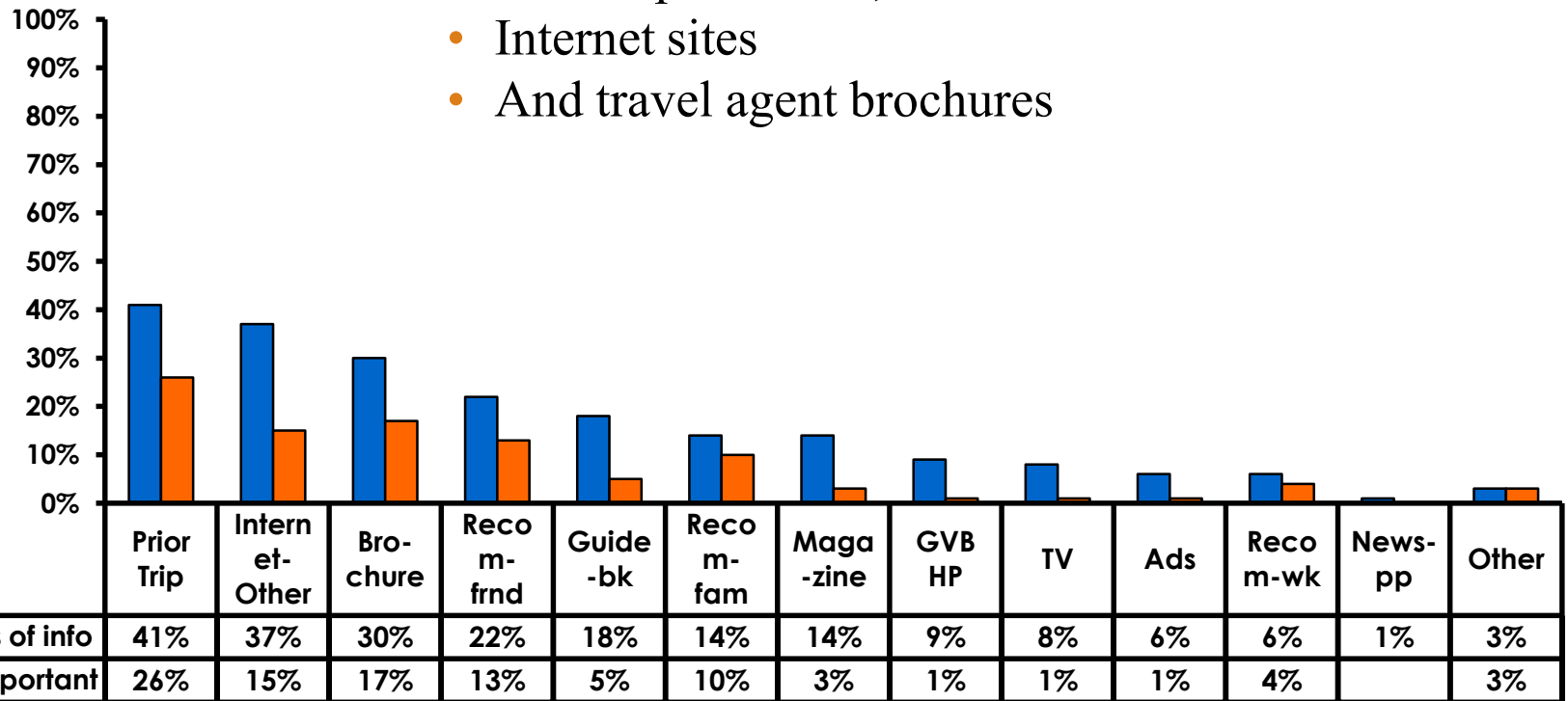
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

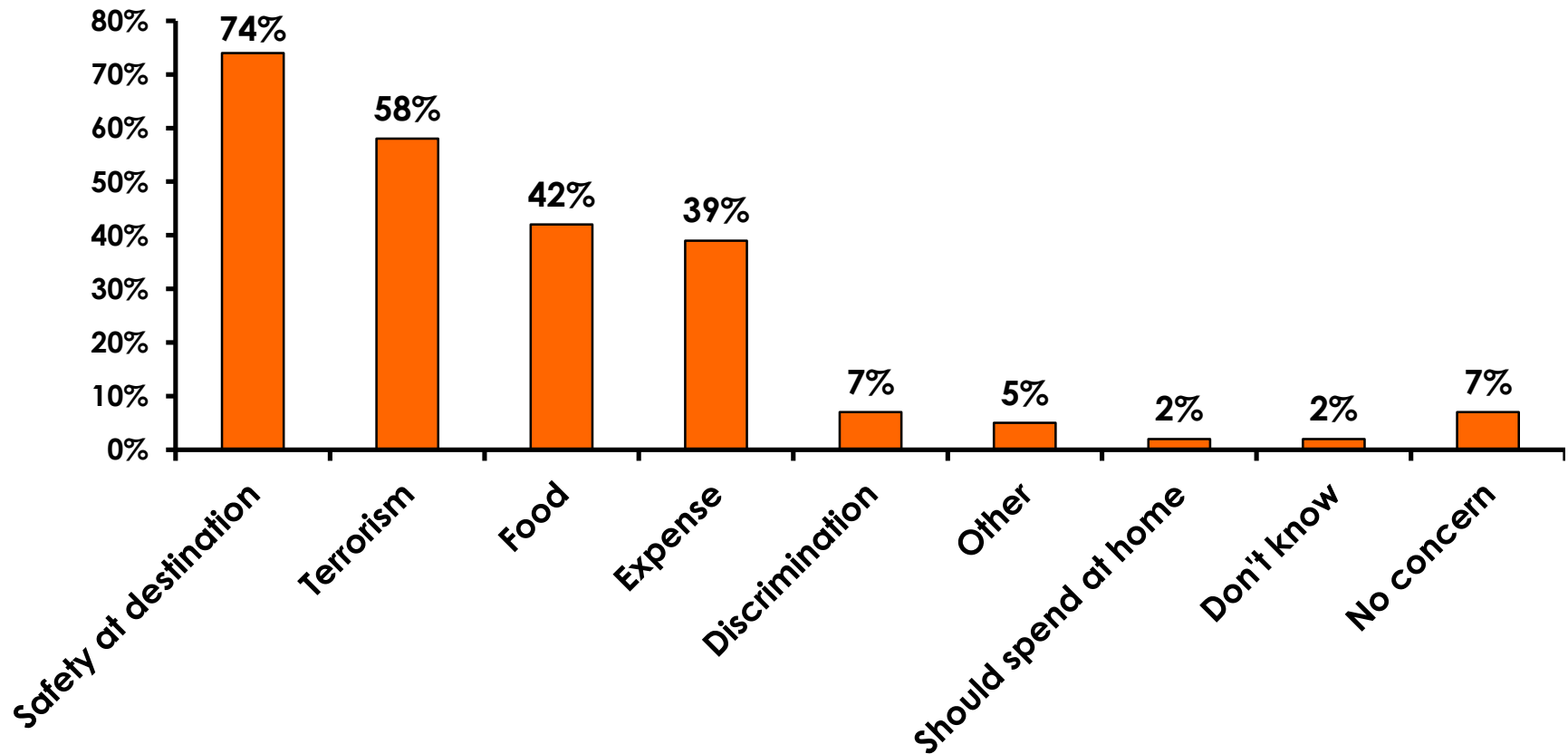
The primary motivational sources of information were.

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



SECTION 6 **OTHER ISSUES**

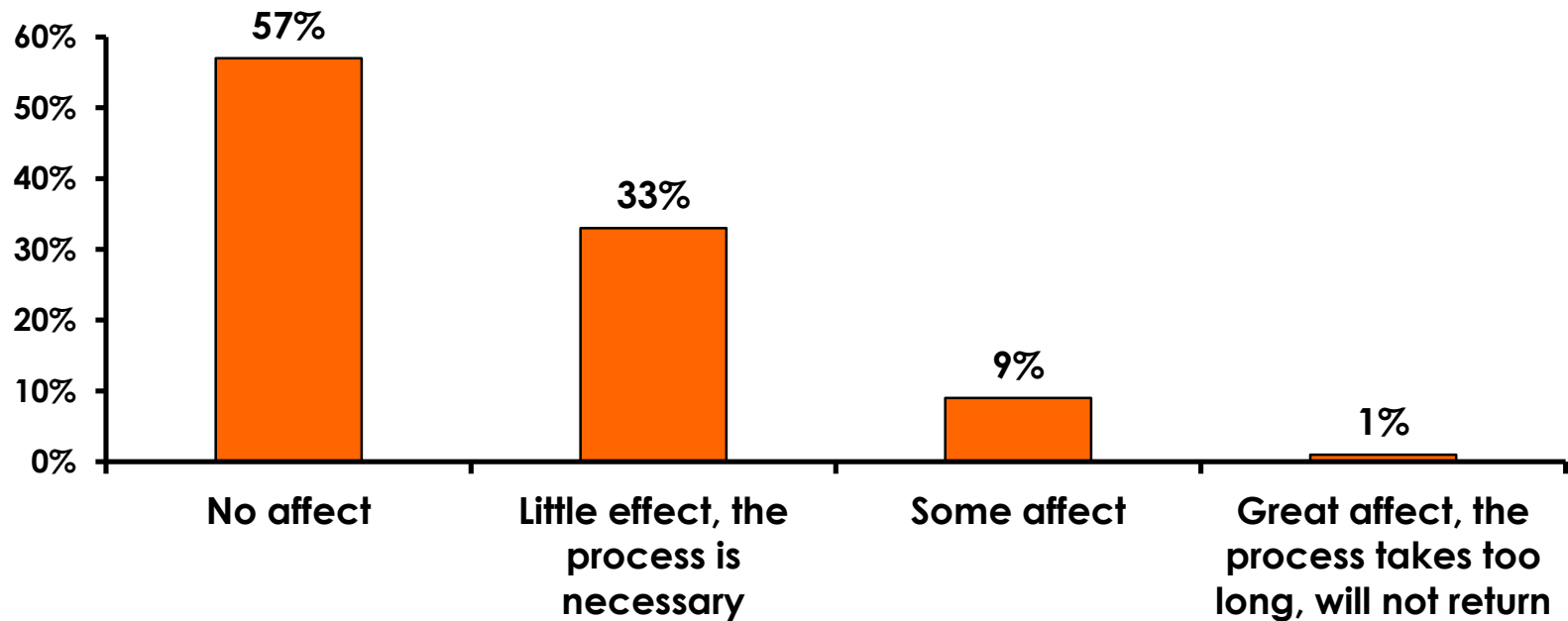
Concerns about travel outside of Japan - Overall



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	74%	68%	79%	72%	80%	86%	80%	64%	74%	74%	75%	73%	100%	
	Terrorism	58%	49%	58%	61%	71%	50%	60%	69%	54%	59%	52%	61%	50%	
	Food	42%	41%	45%	41%	44%	36%	42%	43%	54%	41%	35%	53%	75%	
	Expense	39%	34%	45%	36%	42%	43%	44%	45%	49%	35%	38%	41%	25%	
	Discrimination against Japanese	7%	10%	9%	6%	2%	14%	9%	7%	11%	3%	13%	3%	25%	
	No concerns	7%	9%	6%	6%	7%	14%	9%	10%	11%	3%	2%	8%		
	Other	5%	9%	5%	4%			2%	10%	9%	6%		5%		
	Don't know	2%	3%	3%	3%		7%	4%	2%				2%		
	Should spend at home	2%		3%	4%			2%	2%	9%			2%	25%	
	Total	Count	342	80	109	106	45	14	45	42	35	66	48	59	4

Security Screening/ Immigration Process at Guam International Airport



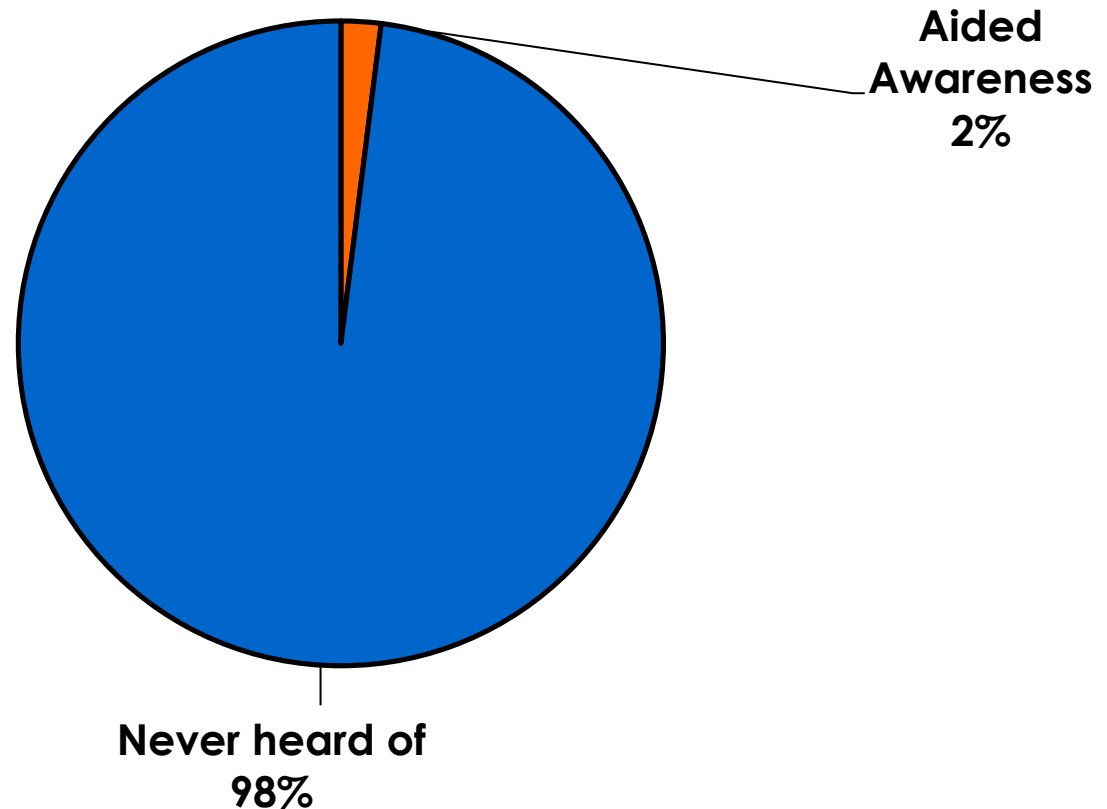
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=6

