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 331 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 331 is +/- 5.4 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 +/- 5.4 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

- 80% of repeat visitors are married.
Marital Status

- Married
- Single

Oct-09 Nov-09 Dec-09 Jan-10 Feb-10 Mar-10 Apr-10 May-10 Jun-10 Jul-10 Aug-10 Sept-10

43% 51% 45% 37% 29% 64% 36% 61% 71% 63% 39% 55% 49% 57%
Age - Overall

- The average age of the respondents is 34.4 years of age.
Average - Age

Oct-09  Nov-09  Dec-09  Jan-10  Feb-10  Mar-10  Apr-10  May-10  Jun-10  July-10  Aug-10  Sept-10

31.8  32.5  32.1  35.4  30.9  27.2  34.4
Personal Income

- ¥93.48=$1
Personal Income – 1st time vs. repeat

- <Y3.0M: 15% 10%
- Y3.0M-Y3.9M: 17% 7%
- Y4.0M-Y4.9M: 11% 1%
- Y5.0M-Y6.9M: 26%
- Y7.0M-Y9.9M: 17% 20%
- Y10.0M+: 18%
- None/Ref: 3% 1%
## Personal Income by Gender & Age

<table>
<thead>
<tr>
<th>PERSONAL INCOME</th>
<th>TOTAL</th>
<th>GENDER</th>
<th>AGE</th>
</tr>
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<tr>
<td></td>
<td></td>
<td>4</td>
<td>10</td>
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<tr>
<td>Y3.0M-Y3.9M</td>
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<td>1</td>
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<tr>
<td>Count</td>
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<td>1</td>
</tr>
<tr>
<td>Y4.0M-Y4.9M</td>
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<td>13</td>
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<tr>
<td>Count</td>
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<td>26</td>
<td>3</td>
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<tr>
<td>Y7.0M-Y9.9M</td>
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<td>22</td>
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<tr>
<td>No Inc</td>
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<td>2</td>
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</tr>
<tr>
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</tr>
<tr>
<td>Total</td>
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<tr>
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<td>81</td>
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<tr>
<td></td>
<td></td>
<td>21</td>
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</tr>
</tbody>
</table>
Travel Companions

- **Family**: 41%
- **Child**: 36%
- **Friends**: 32%
- **Spouse**: 17%
- **Office**: 5%
- **Alone**: 2%
- **Other**: 0%
Number of Children Travel Party

N=118 total respondents traveling with children.
(Of those N=118 respondents, there is a total of 215 children 18 years or younger)
Prior Trips to Guam

- First trip: 55%
- Repeat visitor: 45%
Prior Trips To Guam

Oct-09 Nov-09 Dec-09 Jan-10 Feb-10 Mar-10 Apr-10 May-10 Jun-10 July-10 Aug-10 Sept-10

- 1st Time
- Repeat
Trips to Guam by Age & Gender

- First-time visitors tend to be younger than repeat visitors to Guam.

<table>
<thead>
<tr>
<th>GENDER</th>
<th>Male</th>
<th>Female</th>
<th>Total Count</th>
<th>1st</th>
<th>Repeat</th>
</tr>
</thead>
<tbody>
<tr>
<td>COUNT</td>
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<td>161</td>
<td>331</td>
<td>93</td>
<td>77</td>
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<td>51%</td>
<td>51%</td>
<td>49%</td>
<td>52%</td>
<td>48%</td>
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<table>
<thead>
<tr>
<th>AGE</th>
<th>&lt;20</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50+</th>
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</thead>
<tbody>
<tr>
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<td>118</td>
<td>98</td>
<td>85</td>
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</tr>
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<td>2%</td>
<td>36%</td>
<td>30%</td>
<td>30%</td>
<td>26%</td>
</tr>
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</table>

<table>
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<tr>
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<th>55</th>
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<tbody>
<tr>
<td>Repeat</td>
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<td>56</td>
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<table>
<thead>
<tr>
<th>1st</th>
<th>93</th>
<th>183</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>77</td>
<td>148</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>90</th>
<th>13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>71</td>
<td>14</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>49</th>
<th>85</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>48</td>
<td>56</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>29</th>
<th>24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>16</td>
<td>7</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>7</th>
<th>24</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>17</td>
<td>17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>4</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>4</td>
<td>11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st</th>
<th>331</th>
<th>183</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat</td>
<td>148</td>
<td>148</td>
</tr>
</tbody>
</table>
The average repeat visitor has been to Guam 2.9 times.

Half the repeat visitors have been to Guam within the last 2 years.
Average Number Overnight Trips (2004-2010) (2 nights or more)
Length of Stay

Mean = 3.20 Days
Median = 3.0 Days
Average Length Of Stay

Oct-09  Nov-09  Dec-09  Jan-10  Feb-10  Mar-10  Apr-10  May-10  Jun-10  July-10  Aug-10  Sept-10

3.0  2.9  2.9  3.1  3.1  3.3  3.2
Living Accommodations

- Own: 63%
- Lease/Rent: 33%
- Roomate: 4%
## Occupation by Income

<table>
<thead>
<tr>
<th>Q 29</th>
<th>TOTAL</th>
<th>PERSONAL INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>&lt;Y3.0M</td>
</tr>
<tr>
<td>Co. Employee: Office Worker</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Non-Managerial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Co. Employee: Engineer</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Student</td>
<td>13%</td>
<td>42%</td>
</tr>
<tr>
<td>Co. Employee: Salesperson</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Homemaker</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Self Employed</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Co. Employee: Manager</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Co. Employee: Executive</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Teacher</td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>Professional or Specialist</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Freeter</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Skilled Worker</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Government Employee: Office Worker</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Non-Managerial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free-lancer</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Government Employee: Manager</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Total Count</td>
<td>325</td>
<td>36</td>
</tr>
</tbody>
</table>
SECTION 2
TRAVEL PLANNING
Travel Planning - Overall

- Full tour package: 23%
- Free-time package tours: 61%
- Individually arranged travel: 13%
- Group tour: 3%
- Other: 0%
## Accommodation by Income

**Average length of stay: 3.20 days**

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>TOTAL</th>
<th>&lt;Y3.0M</th>
<th>Y3.0M-Y3.9M</th>
<th>Y4.0M-Y4.9M</th>
<th>Y5.0M-Y6.9M</th>
<th>Y7.0M-Y9.9M</th>
<th>Y10.0M+</th>
<th>No Inc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan Plaza Hotel</td>
<td>16%</td>
<td>17%</td>
<td>31%</td>
<td>13%</td>
<td>14%</td>
<td>6%</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Guam Reef Hotel</td>
<td>11%</td>
<td>11%</td>
<td>22%</td>
<td>9%</td>
<td>5%</td>
<td>2%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Hotel Nikko Guam</td>
<td>7%</td>
<td>3%</td>
<td>3%</td>
<td>9%</td>
<td>5%</td>
<td>7%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Onward Beach Resort</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
<td>16%</td>
<td>6%</td>
<td>17%</td>
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<tr>
<td>Outrigger Guam Resort</td>
<td>7%</td>
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<td>13%</td>
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<td>4%</td>
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<tr>
<td>Pacific Islands Club PIC</td>
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<td>9%</td>
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<td>9%</td>
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<tr>
<td>Leo Palace Resort</td>
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</tr>
<tr>
<td>Royal Orchid Guam</td>
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<td>3%</td>
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<td>4%</td>
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<tr>
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<td>9%</td>
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<tr>
<td>Ramada Suites Guam</td>
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<td>17%</td>
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<td>3%</td>
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<td>6%</td>
<td>3%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Hilton Guam Resort &amp; Spa</td>
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<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
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<tr>
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</tr>
<tr>
<td>Holiday Resort Guam</td>
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<td></td>
</tr>
<tr>
<td>The Westin Resort Guam</td>
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<td>4%</td>
<td>3%</td>
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<td></td>
</tr>
<tr>
<td>Pacific Bay Hotel</td>
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<td>3%</td>
<td>6%</td>
<td>3%</td>
<td>5%</td>
<td>3%</td>
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<td></td>
</tr>
<tr>
<td>Grand Plaza Hotel</td>
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<td>5%</td>
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<td>3%</td>
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</tr>
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<td>Hotel Sante Fe</td>
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<td>2%</td>
<td>6%</td>
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</tr>
<tr>
<td>Ohana Bayview Hotel</td>
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<td>6%</td>
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<td>3%</td>
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<tr>
<td>Tumon Bay Capital Hotel</td>
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<td>2%</td>
<td>3%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>330</strong></td>
<td><strong>36</strong></td>
<td><strong>36</strong></td>
<td><strong>32</strong></td>
<td><strong>64</strong></td>
<td><strong>54</strong></td>
<td><strong>62</strong></td>
<td><strong>5</strong></td>
</tr>
</tbody>
</table>
Travel Motivation - Top Responses

- Beach: 62%
- Trvl time: 45%
- Plea-sure: 44%
- Prior trp: 34%
- Price: 33%
- Relax: 32%
- Shop: 22%
- Safe: 19%
- Wtr spt: 17%
- Rec-omm: 16%
- Hny-mn: 8%
- Marr-ied: 7%
- Scuba: 5%

Colors:
- Reasons for travel
- Most Important
Most Important Reason for Choosing Guam

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

are the primary reasons for visiting during this period.
## Motivation by Age & Gender

<table>
<thead>
<tr>
<th>Q.5</th>
<th>TOTAL</th>
<th>&lt;20</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50+</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beautiful seas, beaches, tropical climate</td>
<td>62%</td>
<td>67%</td>
<td>52%</td>
<td>61%</td>
<td>69%</td>
<td>54%</td>
<td>62%</td>
<td>61%</td>
</tr>
<tr>
<td>Short travel time</td>
<td>45%</td>
<td>33%</td>
<td>35%</td>
<td>50%</td>
<td>59%</td>
<td>33%</td>
<td>50%</td>
<td>40%</td>
</tr>
<tr>
<td>Pleasure</td>
<td>44%</td>
<td>100%</td>
<td>42%</td>
<td>36%</td>
<td>56%</td>
<td>25%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>A previous visit</td>
<td>34%</td>
<td>17%</td>
<td>14%</td>
<td>35%</td>
<td>59%</td>
<td>38%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Price of the tour package</td>
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<td>50%</td>
<td>36%</td>
<td>34%</td>
<td>31%</td>
<td>21%</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td>Just to relax</td>
<td>32%</td>
<td>33%</td>
<td>31%</td>
<td>31%</td>
<td>35%</td>
<td>25%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>Shopping</td>
<td>22%</td>
<td>33%</td>
<td>26%</td>
<td>17%</td>
<td>25%</td>
<td>13%</td>
<td>19%</td>
<td>25%</td>
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SECTION 3
EXPENDITURES
Prepaid Expenditures
¥93.48/US$1

- $1,718.60 = overall mean average prepaid expense (for entire travel party size) by respondent
- $0 = minimum (lowest amount recorded for the entire sample)
- $21,394 = maximum (highest amount recorded for the entire sample)
- $665.80 = overall mean average per person prepaid expenditures
Prepaid Expenditures

YTD=$646.60
Breakdown of Prepaid Expenditures
¥93.48=$1
(Filter: Only those who responded)

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<tr>
<th>Item</th>
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<td>Air &amp; Accommodation package only</td>
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<td>Air &amp; Accommodation w/ daily meal package</td>
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<td>Air only</td>
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<tr>
<td>Accommodation only</td>
<td>$542</td>
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<tr>
<td>Accommodation w/ daily meal only</td>
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<td>Food &amp; Beverages in Hotel</td>
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<td>Ground transportation – Japan</td>
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<td>Ground transportation – Guam</td>
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<td>Optional tours/ activities</td>
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<td>Total Prepaid</td>
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Prepaid Meal Breakdown
Air/ Accommodations with Daily Meal Package
n=27

Mean=$2,238 per travel party
Prepaid Meal Breakdown
Accommodations with Daily Meal Package
n=1

Mean=$213 per travel party
Prepaid Ground Transportation
n=18

Mean=$53.3 per travel party
On-Island Expenditures

- $993.30 = overall mean average on-island expense (for entire travel party size) by respondent
- $0 = Minimum (lowest amount recorded for the entire sample)
- $14,000 = Maximum (highest amount recorded for the entire sample)
- $448.60 = overall mean average per person on-island expenditure
On-Island Expenditures

YTD = $495.90
Prepaid/On-Island Expenditures

On-Island YTD = $495.90
Prepaid YTD = $646.60
### Total On-Island Expenditure by Gender & Age

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# On-Island Expenditure Categories by Gender & Age

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<td>$194.55</td>
<td>$325.21</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Souv-</td>
<td>$35</td>
<td>$100</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift/Souv</td>
<td>$113.50</td>
<td>$175.58</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;F at Home</td>
<td>$50</td>
<td>$50</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Trans</td>
<td>$21.20</td>
<td>$34.76</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Exp</td>
<td>$231.77</td>
<td>$326.29</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total on Island</td>
<td>$833.29</td>
<td>$1,191.16</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Median</td>
<td>$560</td>
<td>$800</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Total Expenditures Per Person (Prepaid & On-Island)

- $1,114.4 = overall average
- $0 = Minimum (lowest amount recorded for the entire sample)
- $4,667 = Maximum (highest amount recorded for the entire sample)
Total Expenditures

YTD=$1,142.40
## Breakdown of On-Island Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>MEAN $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; beverage in a hotel</td>
<td>$62.50</td>
</tr>
<tr>
<td>Food &amp; beverage in fast food restaurant/ convenience store</td>
<td>$41.20</td>
</tr>
<tr>
<td>Food &amp; beverage at restaurants or drinking establishments outside a hotel</td>
<td>$91.50</td>
</tr>
<tr>
<td>Optional tours and activities</td>
<td>$100.90</td>
</tr>
<tr>
<td>Gifts/ souvenirs for yourself/companions</td>
<td>$253.00</td>
</tr>
<tr>
<td>Gifts/ souvenirs for friends/family at home</td>
<td>$141.30</td>
</tr>
<tr>
<td>Local transportation</td>
<td>$27.30</td>
</tr>
<tr>
<td>Other expenses not covered</td>
<td>$274.00</td>
</tr>
<tr>
<td><strong>Average Total</strong></td>
<td><strong>$993.30</strong></td>
</tr>
</tbody>
</table>
Local Transportation

n=91

Mean=$27.3 per travel party

- Trolley/Shop Bus: 56%
- Taxi: 42%
- Car rental: 22%
- Other: 4%
- Bicycle: 1%
- Scooter: 0%
Guam Airport Expenditures

• $44.10 = overall average
• $0 = Minimum (lowest amount recorded for the entire sample)
• $2,000 = Maximum (highest amount recorded for the entire sample)
## Breakdown of Airport Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>MEAN $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverages</td>
<td>$8.80</td>
</tr>
<tr>
<td>Gifts/Souvenirs Self</td>
<td>$15.80</td>
</tr>
<tr>
<td>Gifts/Souvenirs Others</td>
<td>$19.50</td>
</tr>
<tr>
<td>Total</td>
<td>$44.10</td>
</tr>
</tbody>
</table>
SECTION 4
VISITOR SATISFACTION
Satisfaction Scores Overall

7pt Rating Scale
7=Very Satisfied/1=Very Dissatisfied
Guam Perceptions

Oct-09  Nov-09  Dec-09  Jan-10  Feb-10  Mar-10  Apr-10  May-10  Jun-10  July-10  Aug-10  Sept-10

- Clean beach/park: 5.5  5.7  5.5  5.5  5.6  5.7  5.6
- Ease getting around: 5.2  5.5  5.4  5.3  5.2  5.3  5.3
- Safe walk night: 4.8  4.9  4.8  4.9  4.8  4.8  4.9
- Price: 4.6  4.7  4.8  4.6  4.7  5.0  4.6
- Overall: 5.7  5.8  5.8  5.7  5.8  5.9  5.8
Quality of Accommodations
7pt Rating Scale
7=Very Satisfied/1=Very Dissatisfied

Very satisfied
MEAN

<table>
<thead>
<tr>
<th></th>
<th>Room</th>
<th>View</th>
<th>Furnish-ing</th>
<th>Cleanliness</th>
<th>Food Quality</th>
<th>Food Qty</th>
<th>Staff</th>
<th>Service</th>
<th>Value</th>
<th>OVER-ALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>21%</td>
<td>27%</td>
<td>16%</td>
<td>17%</td>
<td>14%</td>
<td>21%</td>
<td>23%</td>
<td>19%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>20%</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Quality of Dining Experience

7pt Rating Scale
7=Very Satisfied/1=Very Dissatisfied

- Furnishings: 14% Very satisfied (5.1)
- Cleanliness: 9% Very satisfied (4.8)
- Food Quality: 13% Very satisfied (4.9)
- Food Quantity: 22% Very satisfied (5.2)
- Staff Service: 17% Very satisfied (5.2)
- Service: 16% Very satisfied (5.2)
- Value: 13% Very satisfied (5.2)
Visits to Shopping Centers/Malls on Guam

Top responses

- ABC
- DFS Galleria
- Micro Mall
- K-Mart
- Prem Outlet
- Japan Plaza
- The Plaza
- Macys
- Tumon Sands

Shopped

<table>
<thead>
<tr>
<th>Mall</th>
<th>Shopped</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC</td>
<td>92%</td>
</tr>
<tr>
<td>DFS Galleria</td>
<td>87%</td>
</tr>
<tr>
<td>Micro Mall</td>
<td>65%</td>
</tr>
<tr>
<td>K-Mart</td>
<td>62%</td>
</tr>
<tr>
<td>Prem Outlet</td>
<td>56%</td>
</tr>
<tr>
<td>Japan Plaza</td>
<td>49%</td>
</tr>
<tr>
<td>The Plaza</td>
<td>48%</td>
</tr>
<tr>
<td>Macys</td>
<td>32%</td>
</tr>
<tr>
<td>Tumon Sands</td>
<td>29%</td>
</tr>
</tbody>
</table>
# Satisfaction with Shopping

7pt Rating Scale  
7=Very Satisfied/ 1=Very Dissatisfied

<table>
<thead>
<tr>
<th>Quality of Shopping</th>
<th>Variety of Shopping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score of 6 to 7 = <strong>50%</strong></td>
<td>Score of 6 to 7 = <strong>49%</strong></td>
</tr>
<tr>
<td>Score of 4 to 5 = <strong>43%</strong></td>
<td>Score of 4 to 5 = <strong>44%</strong></td>
</tr>
<tr>
<td>Score 1 to 3 = <strong>6%</strong></td>
<td>Score 1 to 3 = <strong>8%</strong></td>
</tr>
</tbody>
</table>

**MEAN = 5.3**  
**MEAN = 5.2**
Optional Tour Participation

- Average number of tours participated in is 1.1

- One or more: 60%
- None: 40%
Optional Tours
Participation & Satisfaction

<table>
<thead>
<tr>
<th>Tour</th>
<th>Participated</th>
<th>MEAN Satis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alu-pang</td>
<td>8%</td>
<td>6.1</td>
</tr>
<tr>
<td>Undr Wld</td>
<td>7%</td>
<td>5.5</td>
</tr>
<tr>
<td>Cham NM</td>
<td>6%</td>
<td>6.1</td>
</tr>
<tr>
<td>Sand-cst</td>
<td>6%</td>
<td>6.4</td>
</tr>
<tr>
<td>Atl Sub</td>
<td>6%</td>
<td>5.4</td>
</tr>
<tr>
<td>Fish eye</td>
<td>4%</td>
<td>6.1</td>
</tr>
<tr>
<td>Man-dara</td>
<td>4%</td>
<td>5.8</td>
</tr>
<tr>
<td>Cocos</td>
<td>2%</td>
<td>5.6</td>
</tr>
<tr>
<td>Sky-dive</td>
<td>2%</td>
<td>6.3</td>
</tr>
<tr>
<td>Sling-sht</td>
<td>1%</td>
<td>6.3</td>
</tr>
<tr>
<td>Copt-er</td>
<td>1%</td>
<td>7.0</td>
</tr>
<tr>
<td>Gef Pago</td>
<td>1%</td>
<td>6.0</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
<td>6.2</td>
</tr>
</tbody>
</table>
## Day Tours Satisfaction

7pt Rating Scale  
7=Very Satisfied/ 1=Very Dissatisfied

<table>
<thead>
<tr>
<th></th>
<th>Quality of Day Tour</th>
<th>Variety of Day Tour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score of 6 to 7</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Score of 4 to 5</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Score 1 to 3</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>MEAN</strong></td>
<td><strong>5.4</strong></td>
<td><strong>5.4</strong></td>
</tr>
</tbody>
</table>
# Night Tours Satisfaction

7pt Rating Scale  
7=Very Satisfied/ 1=Very Dissatisfied

<table>
<thead>
<tr>
<th>Quality of Night Tour</th>
<th>Variety of Night Tour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score of 6 to 7 = 34%</td>
<td>Score of 6 to 7 = 31%</td>
</tr>
<tr>
<td>Score of 4 to 5 = 61%</td>
<td>Score of 4 to 5 = 66%</td>
</tr>
<tr>
<td>Score 1 to 3 = 3%</td>
<td>Score 1 to 3 = 2%</td>
</tr>
</tbody>
</table>

MEAN = 4.9  
MEAN = 4.8
Satisfaction with Other Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Participated</th>
<th>MEAN Satis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop</td>
<td>48%</td>
<td>5.8</td>
</tr>
<tr>
<td>Sight-see</td>
<td>34%</td>
<td>5.8</td>
</tr>
<tr>
<td>Rsrt</td>
<td>28%</td>
<td>6.2</td>
</tr>
<tr>
<td>Snor-kle</td>
<td>21%</td>
<td>5.9</td>
</tr>
<tr>
<td>Para-sail</td>
<td>17%</td>
<td>6.1</td>
</tr>
<tr>
<td>Din</td>
<td>17%</td>
<td>6.0</td>
</tr>
<tr>
<td>Show</td>
<td>16%</td>
<td>5.5</td>
</tr>
<tr>
<td>Dol-phin</td>
<td>15%</td>
<td>5.5</td>
</tr>
<tr>
<td>Arch site</td>
<td>14%</td>
<td>6.0</td>
</tr>
<tr>
<td>Jetski</td>
<td>12%</td>
<td>6.1</td>
</tr>
<tr>
<td>Wtr Park</td>
<td>8%</td>
<td>6.0</td>
</tr>
<tr>
<td>Gun sh</td>
<td>7%</td>
<td>5.4</td>
</tr>
<tr>
<td>Scuba</td>
<td>4%</td>
<td>5.8</td>
</tr>
<tr>
<td>Golf</td>
<td>1%</td>
<td>4.0</td>
</tr>
<tr>
<td>Wind surf</td>
<td>5%</td>
<td>6.4</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Which activities or attractions would you most likely participate in if they were available on Guam?

- Casino: 26%
- Theme park: 22%
- Sports comp: 22%
- Boardwalk: 20%
- Cham Food Fest: 18%
- Guam Cult Fest: 15%
- Music/Film Fest: 9%
- Micro Cult Fest: 5%
- Don't know: 22%
What would it take to make you want to stay an extra day in Guam?

- More time: 51%
- Budget/Money: 30%
- Nothing: 20%
- Flight Sched: 15%
- More things to do: 10%
- Less restrictions: 5%
- Other: 4%
On-Island Perceptions

7pt Rating Scale
7=Very Satisfied/ 1=Very Dissatisfied

- Guam was better than expected: 29%, MEAN 5.7
- I had no communication problems: 40%, MEAN 5.7
- I will recommend Guam to friends: 34%, MEAN 5.8
- Sites on Guam were attractive: 19%, MEAN 5.1
- I plan to visit Guam again: 36%, MEAN 5.6
- Not enough night activities: 14%, MEAN 4.5
SECTION 5
PROMOTIONS
Guam Promotion - Media
Past 90 days

- Don't recall: 70%
- TV: 12%
- Internet: 5%
- Guidebook: 4%
- Brochures: 4%
- Travel agent: 2%
- GVB Promo: 1%
- Newspaper: 1%
- Magazine: 0%
- Guam Fiesta: 0%
Message Recall
(Filter: recall ad/promo n=99)

- 68% An image
- 22% Other
- 9% Don’t recall
- 4% Tag line
Aided Awareness - Image Test
(Filter: recall ad/promo n=99)

Yes, recall image; 28%
No; 72%
Aided Image Recall
(Filter: recall image n=28)

- **43%** - Koko Bird- OL Version (Asada! Namadesu Tabi Salad Program Ad)
- **39%** - Koko Bird – Sr. Version (Shimura’s Zoo Program Ad)
- **25%** - Guam Wedding (Nodame Canterbile Cinema Ad)
Sources of Information Pre-arrival

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

<table>
<thead>
<tr>
<th>Sources of info</th>
<th>Internet</th>
<th>Guide-book</th>
<th>Brochure</th>
<th>Prior trip</th>
<th>Recomm</th>
<th>Magazine</th>
<th>TV</th>
<th>Co Trvl Dept</th>
<th>GVB Promo</th>
<th>GVB Office</th>
<th>Newspaper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most important</td>
<td>63%</td>
<td>59%</td>
<td>46%</td>
<td>43%</td>
<td>19%</td>
<td>19%</td>
<td>6%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>0%</td>
<td>34%</td>
<td>31%</td>
<td>13%</td>
<td>8%</td>
<td>6%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Sources of Information Post-arrival

- The primary local source of information are tour staff members.
SECTION 6
OTHER ISSUES
Rating the Japan economy compared to 12 months ago - Overall

- Conditions have worsened: 50%
- Remained the same: 33%
- Improved: 9%
- Not sure: 8%
Rating the Japan economy compared to 12 months ago - By Age & Income

<table>
<thead>
<tr>
<th></th>
<th>AGE &lt;20</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50+</th>
<th>&lt;Y3.0M</th>
<th>Y3.0M-Y3.9M</th>
<th>Y4.0M-Y4.9M</th>
<th>Y5.0M-Y6.9M</th>
<th>Y7.0M-Y9.9M</th>
<th>Y10.0M+</th>
<th>No Inc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q23 Conditions have worsened</td>
<td>67%</td>
<td>45%</td>
<td>48%</td>
<td>54%</td>
<td>67%</td>
<td>47%</td>
<td>56%</td>
<td>38%</td>
<td>67%</td>
<td>44%</td>
<td>47%</td>
<td>40%</td>
</tr>
<tr>
<td>Q23 Conditions have remained the same</td>
<td>17%</td>
<td>30%</td>
<td>39%</td>
<td>35%</td>
<td>17%</td>
<td>31%</td>
<td>22%</td>
<td>38%</td>
<td>24%</td>
<td>43%</td>
<td>40%</td>
<td>20%</td>
</tr>
<tr>
<td>Q23 Conditions have improved</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>17%</td>
<td>9%</td>
<td>5%</td>
<td>11%</td>
<td>8%</td>
<td>20%</td>
</tr>
<tr>
<td>Q23 Do not know</td>
<td>17%</td>
<td>14%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>14%</td>
<td>6%</td>
<td>16%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>20%</td>
</tr>
<tr>
<td>Total Count</td>
<td>6</td>
<td>118</td>
<td>97</td>
<td>85</td>
<td>24</td>
<td>36</td>
<td>36</td>
<td>32</td>
<td>63</td>
<td>54</td>
<td>62</td>
<td>5</td>
</tr>
</tbody>
</table>
Good time to spend money on travel outside of Japan - Overall

- No: 17%
- Yes: 37%
- Not sure: 40%
- Don't know: 5%
Good time to spend money on travel outside of Japan by Age & Income

<table>
<thead>
<tr>
<th>AGE</th>
<th>&lt;20</th>
<th>20-29</th>
<th>30-39</th>
<th>40-49</th>
<th>50+</th>
<th>&lt;Y3 0 M</th>
<th>Y3.0M-Y3.9 M</th>
<th>Y4.0M-Y4.9 M</th>
<th>Y5.0M-Y5.9 M</th>
<th>Y7.0M-Y9.9 M</th>
<th>Y10.0M+</th>
<th>No Inc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q24</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>No</td>
<td>17%</td>
<td>20%</td>
<td>14%</td>
<td>21%</td>
<td>21%</td>
<td>11%</td>
<td>17%</td>
<td>13%</td>
<td>19%</td>
<td>24%</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>Yes</td>
<td>67%</td>
<td>41%</td>
<td>34%</td>
<td>33%</td>
<td>42%</td>
<td>36%</td>
<td>44%</td>
<td>34%</td>
<td>36%</td>
<td>33%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>Not sure</td>
<td>17%</td>
<td>37%</td>
<td>41%</td>
<td>49%</td>
<td>25%</td>
<td>50%</td>
<td>36%</td>
<td>41%</td>
<td>42%</td>
<td>41%</td>
<td>39%</td>
<td>20%</td>
</tr>
<tr>
<td>Do not know</td>
<td>17%</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>13%</td>
<td>3%</td>
<td>3%</td>
<td>13%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
<td>20%</td>
</tr>
<tr>
<td>Total</td>
<td>Count</td>
<td>6</td>
<td>118</td>
<td>98</td>
<td>85</td>
<td>24</td>
<td>36</td>
<td>36</td>
<td>32</td>
<td>64</td>
<td>54</td>
<td>62</td>
</tr>
</tbody>
</table>
The importance of the state of the Japanese economy in decision to travel outside of Japan - Overall
The importance of the state of the Japanese economy in decision to travel outside of Japan by Age & Income

<table>
<thead>
<tr>
<th>Q 25</th>
<th>AGE</th>
<th>PERSONAL INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&lt;20</td>
<td>20-29</td>
</tr>
<tr>
<td>Very unimportant</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Somewhat unimportant</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>33%</td>
<td>43%</td>
</tr>
<tr>
<td>Very important</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Do not know</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Total</td>
<td>6</td>
<td>118</td>
</tr>
</tbody>
</table>
Concerns about travel outside of Japan - Overall

- Safety at destination: 81%
- Terrorism: 55%
- Expense: 47%
- Food: 36%
- Other: 3%
- No concerns: 3%
- Should spend at home: 1%
- Don't know: 3%
## Concerns about travel outside of Japan - By Age & Income

<table>
<thead>
<tr>
<th>Q 26</th>
<th>AGE</th>
<th>PERSONAL INCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>&lt;20</td>
<td>20-29</td>
</tr>
<tr>
<td>Safety at my destination</td>
<td>83%</td>
<td>76%</td>
</tr>
<tr>
<td>Terrorism</td>
<td>33%</td>
<td>48%</td>
</tr>
<tr>
<td>Expense</td>
<td>33%</td>
<td>47%</td>
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<tr>
<td>Food</td>
<td>17%</td>
<td>38%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>No concerns</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Do not know</td>
<td>33%</td>
<td>3%</td>
</tr>
<tr>
<td>Spending money abroad when it should be spent at home</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Total Cases</td>
<td>6</td>
<td>118</td>
</tr>
</tbody>
</table>
Security Screening/ Immigration Process at Guam International Airport

- No affect: 51%
- Little effect, the process is necessary: 37%
- Some affect: 11%
- Great affect, the process takes too long, will not return: 1%

No affect
Little effect, the process is necessary
Some affect
Great affect, the process takes too long, will not return
Increase Drinking Age to 21

- Strongly favor: 18%
- Somewhat favor: 22%
- Indifferent: 52%
- Somewhat disapprove: 5%
- Strongly disapprove: 3%
Increase Drinking Age to 21 by Gender & Age

<table>
<thead>
<tr>
<th>Q.28.3</th>
<th>Gender</th>
<th>Age</th>
<th>Male</th>
<th>Female</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favor</td>
<td>Count</td>
<td></td>
<td>30</td>
<td>29</td>
<td>22</td>
<td>36</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Col %</td>
<td></td>
<td>17.8%</td>
<td>18.0%</td>
<td>13.2%</td>
<td>24.0%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Somewhat Favor</td>
<td>Count</td>
<td></td>
<td>33</td>
<td>40</td>
<td>38</td>
<td>33</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Col %</td>
<td></td>
<td>19.5%</td>
<td>24.8%</td>
<td>22.8%</td>
<td>22.0%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Indifferent</td>
<td>Count</td>
<td></td>
<td>93</td>
<td>79</td>
<td>91</td>
<td>72</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Col %</td>
<td></td>
<td>55.0%</td>
<td>49.1%</td>
<td>54.5%</td>
<td>48.0%</td>
<td>69.2%</td>
</tr>
<tr>
<td>Somewhat disapprove</td>
<td>Count</td>
<td></td>
<td>8</td>
<td>7</td>
<td>10</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Col %</td>
<td></td>
<td>4.7%</td>
<td>4.3%</td>
<td>6.0%</td>
<td>2.7%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Strongly disapprove</td>
<td>Count</td>
<td></td>
<td>5</td>
<td>6</td>
<td>6</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Col %</td>
<td></td>
<td>3.0%</td>
<td>3.7%</td>
<td>3.6%</td>
<td>3.3%</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>Count</td>
<td></td>
<td>169</td>
<td>161</td>
<td>167</td>
<td>150</td>
<td>13</td>
</tr>
</tbody>
</table>
Hotel Room Surcharge by $3.00/ Per day/ Per room, to help build Guam Museum

- Mean Rating – 3.6 out of possible 7.0
- Agree (Score 6-7) – 15%
- Neutral (Score 4-5) – 49%
- Disagree (Score 1-3) – 36%
Awareness of U.S. Military troops moving from Japan to Guam

Aware; 64%

Not aware; 36%
Effects of U.S. Military troop movement on future trips to Guam

- No effect - will visit again; 56%
- Some effect - may or may not return; 40%
- Great effect - will not return; 5%
Likelihood of travel outside of Japan within the next 6 to 24 months

- **Unsure**:
  - 6 months: 37%
  - 12 months: 36%
  - 18 months: 44%
  - 24 months: 43%

- **Very unlikely**:
  - 6 months: 18%
  - 12 months: 9%
  - 18 months: 7%
  - 24 months: 3%

- **Somewhat unlikely**:
  - 6 months: 21%
  - 12 months: 14%
  - 18 months: 7%
  - 24 months: 6%

- **Somewhat likely**:
  - 6 months: 13%
  - 12 months: 25%
  - 18 months: 24%
  - 24 months: 22%

- **Very likely**:
  - 6 months: 11%
  - 12 months: 16%
  - 18 months: 17%
  - 24 months: 25%