

GUAM VISITORS BUREAU Japan Visitor Tracker Exit Profile FY2014 APRIL 2014



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.



OBJECTIVES

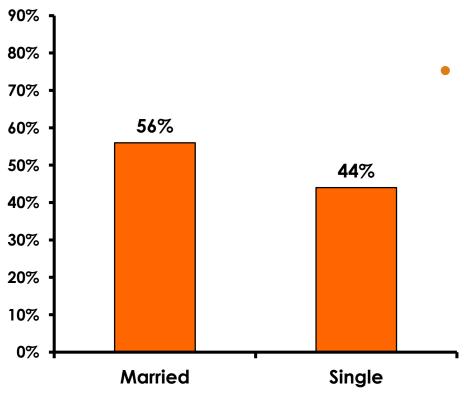
- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.



SECTION 1 PROFILE OF RESPONDENTS



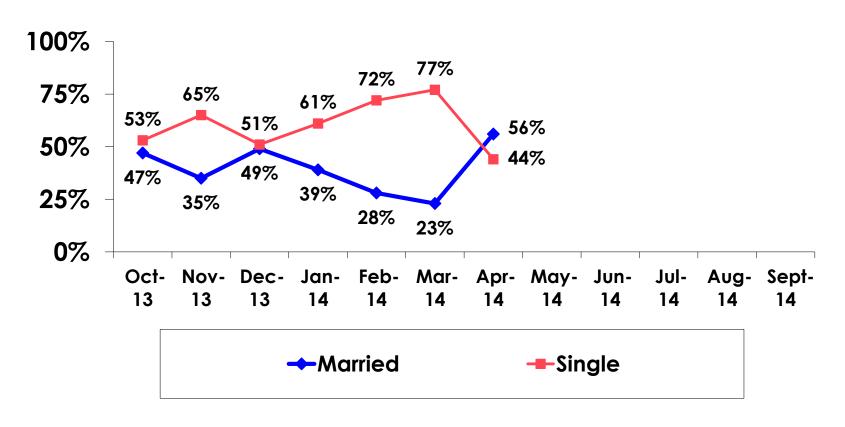
Marital Status - Overall



• 67% of repeat visitors are married.

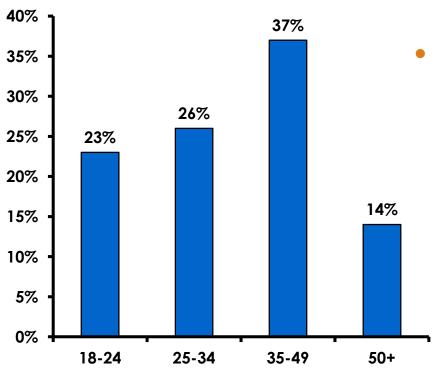


MARITAL STATUS





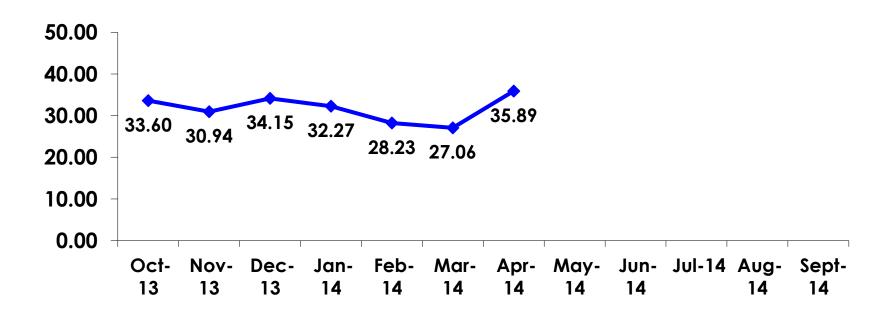
Age - Overall



The average age of the respondents is 35.89 years of age.

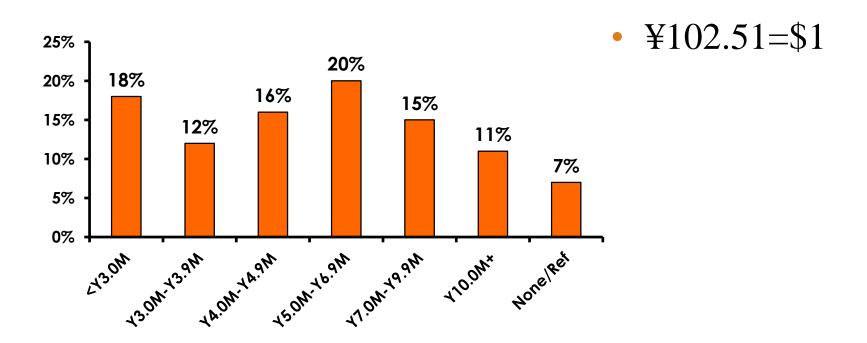


AVERAGE - AGE



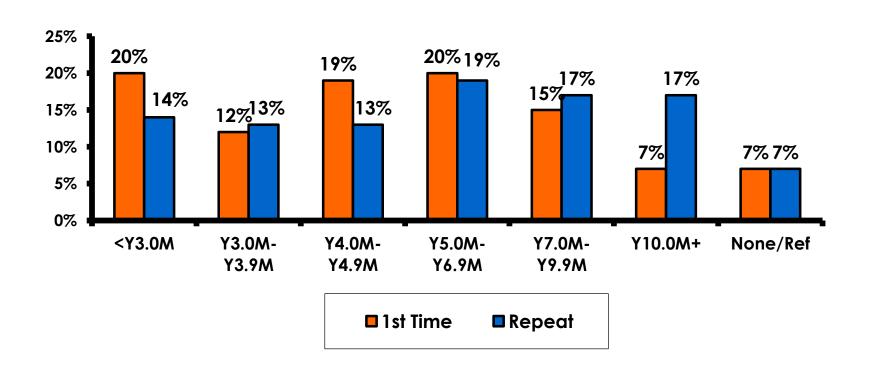


Personal Income





Personal Income – 1st time vs. repeat



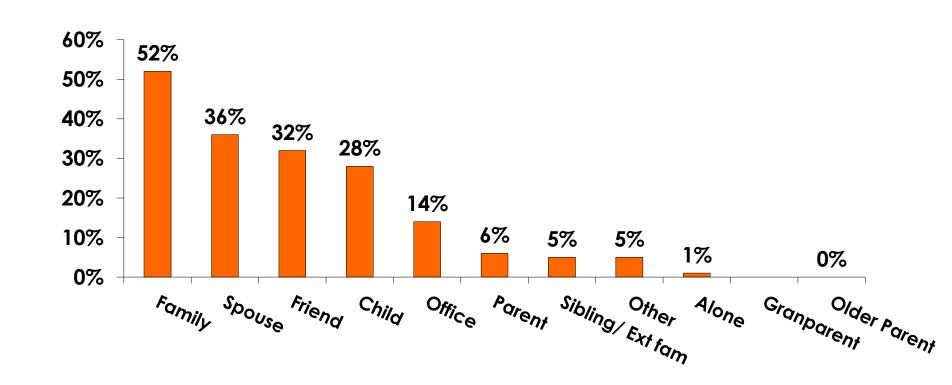


Personal Income by Gender & Age

			TOTAL	GEN	DER		AG	E	
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<y2.0 million<="" td=""><td>Count</td><td>18</td><td>6</td><td>12</td><td>6</td><td>5</td><td>4</td><td>3</td></y2.0>	Count	18	6	12	6	5	4	3
		Column N %	5%	3%	7%	8%	6%	3%	6%
	Y2.0M-Y3.0M	Count	43	12	31	14	13	12	4
		Column N %	13%	7%	18%	18%	15%	10%	8%
	Y3.0M-Y4.0M	Count	41	20	21	7	17	11	6
		Column N %	12%	11%	13%	9%	19%	9%	12%
	Y4.0M-Y5.0M	Count	56	33	23	13	18	18	7
		Column N %	16%	19%	14%	17%	20%	14%	14%
	Y5.0M-Y7.0M	Count	67	35	32	7	17	35	8
		Column N %	20%	20%	19%	9%	19%	28%	16%
	Y7.0M-Y10.0M	Count	53	34	19	4	13	24	12
		Column N %	15%	20%	11%	5%	15%	19%	24%
	Y10.0M+	Count	39	27	12	5	5	20	9
		Column N %	11%	16%	7%	6%	6%	16%	18%
	No Income	Count	25	7	18	21	1	2	1
		Column N %	7%	4%	11%	27%	1%	2%	2%
	Total	Count	342	174	168	77	89	126	50



Travel Companions

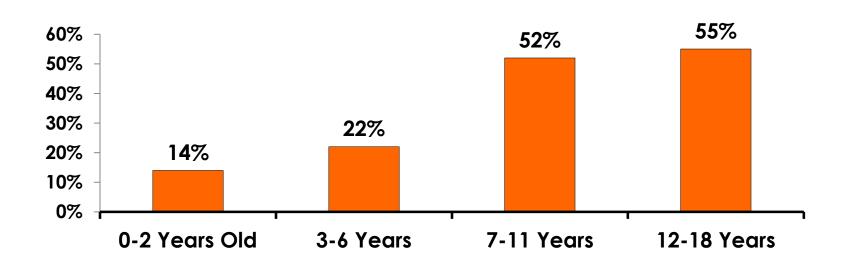




Number of Children Travel Party

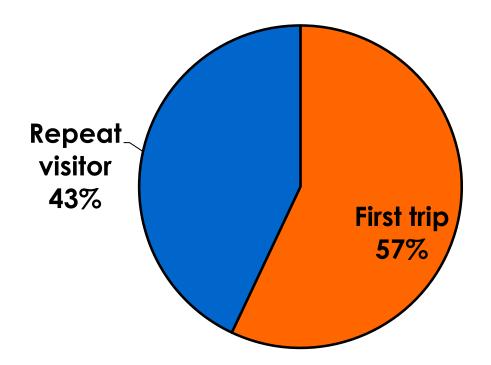
N=100 total respondents traveling with children.

(Of those N=100 respondents, there is a total of 177 children 18 years or younger)



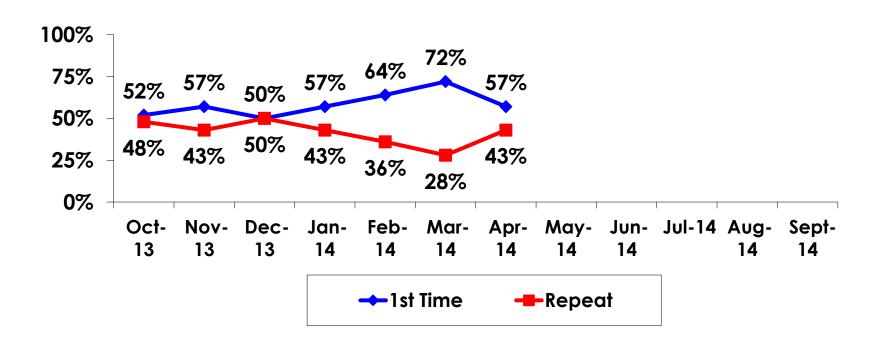


Prior Trips to Guam





PRIOR TRIPS TO GUAM





Trips to Guam by Age & Gender

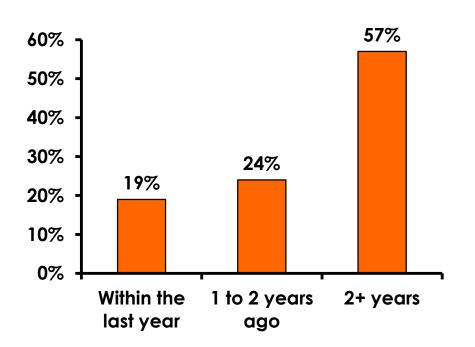
			TOTAL	TRIPS T	O GUAM
			1	1st	Repeat
GENDER	Male	Count	176	99	77
		Column N %	50%	50%	51%
	Female	Count	174	99	75
		Column N %	50%	50%	49%
	Total	Count	350	198	152
AGE	18-24	Count	80	60	20
		Column N %	23%	30%	13%
	25-34	Count	91	55	36
		Column N %	26%	28%	24%
	35-49	Count	129	59	70
		Column N %	37%	30%	46%
	50+	Count	50	24	26
		Column N %	14%	12%	17%
	Total	Count	350	198	152

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



Repeat Visitors Last Trip

n = 150

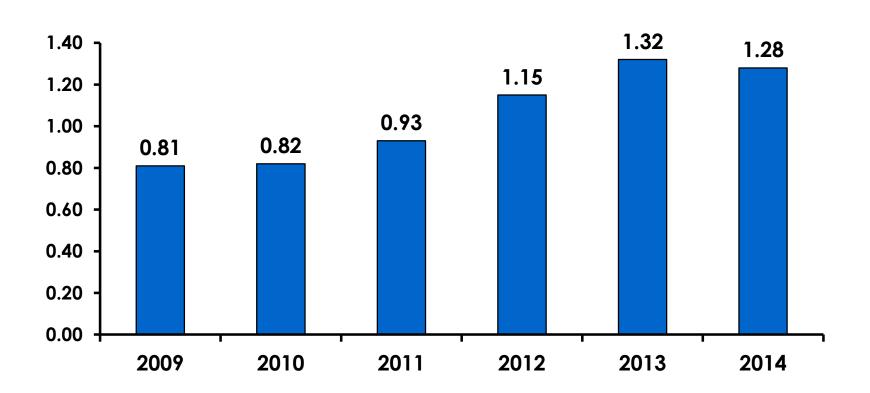


- The average repeat visitor has been to Guam 2.65 times.
- Two in five repeat visitors have been to Guam within the last 2 years.



Average Number Overnight Trips

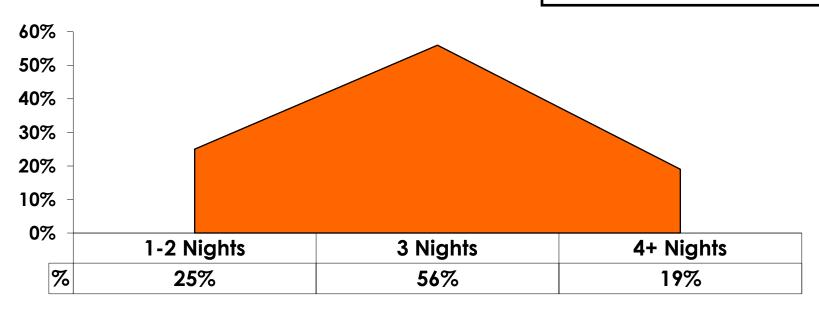
(2009-2014) (2 nights or more)





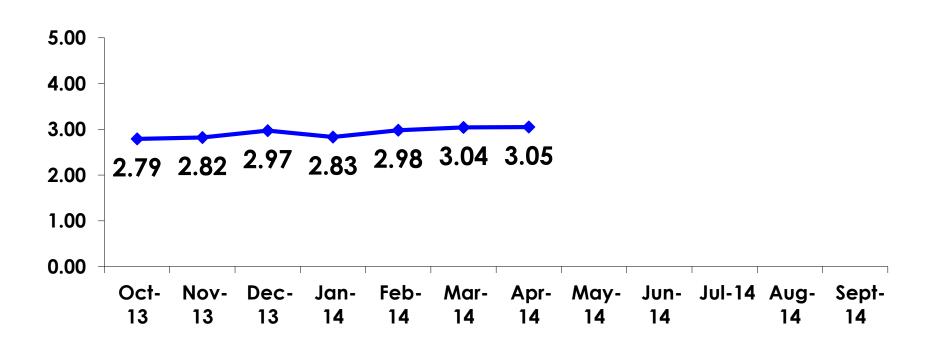
Length of Stay

Mean = 3.05 Days Median = 3.0 Days





AVG LENGTH OF STAY





Occupation by Income

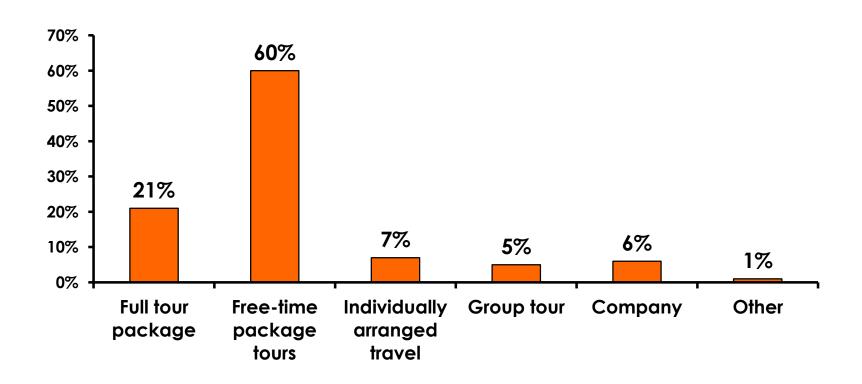
			TOTAL	Q26							
			-	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q25	Engineer		20%	17%	21%	24%	20%	21%	26%	18%	
	Student		12%	28%	5%	2%	7%	4%	6%	10%	80%
	Salesperson		12%	6%	12%	20%	18%	10%	13%	8%	
	Office worker non-mgr		10%	11%	12%	17%	7%	12%	9%	8%	
	Homemaker		9%	11%		2%	9%	15%	15%	5%	8%
	Self-employed		9%	11%	5%	5%	13%	10%	9%	15%	
	Manager		7%		2%	5%	9%	7%	6%	18%	4%
	Other		5%	6%	14%		4%	7%	2%	3%	
	Skilled worker		4%		14%	12%	5%	1%			
	Executive (30+ employees)		2%				4%	3%	2%	8%	
	Freeter		2%		7%		4%		2%		
	Professional/ Specialist		2%			7%		1%	4%	3%	
	Retired		2%	6%	2%	2%		3%	2%		
	Govt- office worker non- mgr		1%		2%	2%		1%		3%	
	Unemployed		1%		2%						8%
	Free-lancer		1%	6%	2%				2%		
	Teacher		1%				2%			3%	
	Govt- Manager		1%					1%	2%		
	Total	Count	349	18	43	41	56	67	53	39	25



SECTION 2 TRAVEL PLANNING



Travel Planning - Overall





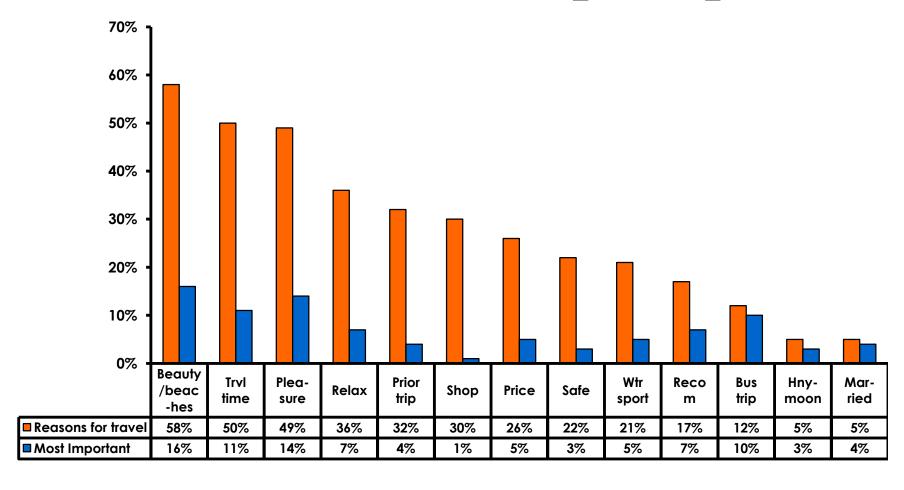
Accommodation by Income

Average length of stay: 3.05 days

			TOTAL	Q26							
			-	<y2.0 million<="" th=""><th>Y2.0M-Y3.0M</th><th>Y3.0M-Y4.0M</th><th>Y4.0M-Y5.0M</th><th>Y5.0M-Y7.0M</th><th>Y7.0M-Y10.0M</th><th>Y10.0M+</th><th>No Income</th></y2.0>	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		14%	17%	24%	12%	16%	15%	8%	5%	12%
	Guam Reef & Olive Spa		11%	17%	21%	7%	13%	4%	6%	21%	4%
	Outrigger Guam Resort		10%	17%	10%	10%	11%	13%	6%	13%	
	Grand Plaza Hotel		8%	6%	10%	12%	11%	4%	2%	8%	12%
	Holiday Resort Guam		7%		2%	7%	5%	12%	11%	5%	12%
	Onward Beach Resort		7%	11%	7%	10%	5%	7%	11%	3%	
	Westin Resort Guam		7%	6%	7%	7%	7%	6%	13%	3%	4%
	Fiesta Resort Guam		5%		5%	15%	4%		9%	3%	4%
	Leo Palace Resort		5%		5%	2%	2%	6%	4%	8%	12%
	Hotel Nikko Guam		4%	6%	2%		4%	7%	8%	5%	
	Royal Orchid Guam		4%	6%		2%	9%	3%	2%	3%	12%
	Pacific Bay Hotel		3%		2%	2%	2%	3%	2%	10%	4%
	PIC Club		3%			2%	2%	3%	8%	5%	4%
	Oceanview Hotel		2%					3%	4%	3%	8%
	Other		2%	6%	2%	2%	2%	3%		3%	
	Sheraton Laguna Guam		1%				2%	1%	4%	3%	
	Guam Marriott Resort		1%				2%	1%	4%	3%	
	Bayview Hotel		1%		2%			1%			8%
	Hyatt Regency Guam		1%	6%		2%	4%				
	Hilton Guam Resort		1%	6%				3%			
	Hotel Santa Fe		1%			2%		1%			
	Ramada Suites Guam		0%								4%
	Days Inn (Tamuning)		0%				2%				
	Apartment		0%			2%					
	Total	Count	349	18	42	41	56	67	53	39	25



Travel Motivation - Top Responses





Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Short travel time
 are the primary reasons for visiting during
 this period.



Motivation by Age & Gender

			TOTAL		AG	E		GEN	DER
			-	18-24	25-34	35-49	50+	Male	Female
Q5A	Natural beauty		58%	59%	52%	70%	40%	57%	59%
	Short travel time		50%	36%	44%	67%	40%	49%	51%
	Pleasure		49%	46%	48%	60%	28%	51%	48%
	Relax		36%	27%	42%	42%	22%	32%	40%
	Previous trip		32%	21%	25%	40%	38%	30%	34%
	Shopping		30%	31%	32%	32%	22%	28%	32%
	Price		26%	21%	26%	33%	20%	26%	27%
	Safe		22%	15%	18%	31%	20%	21%	24%
	Water sports		21%	15%	21%	29%	8%	20%	22%
	Recomm- friend/family/trvl agnt		17%	33%	11%	12%	14%	13%	20%
	Company/ Business Trip		12%	12%	16%	9%	12%	11%	13%
	Honeymoon		5%	6%	9%	5%		9%	29
	Married/ Attn wedding		5%	6%	9%	2%	6%	6%	5%
	Scuba		5%	8%	3%	4%	6%	2%	89
	Golf		4%			5%	18%	9%	
	Other		3%		1%	5%	8%	4%	29
	Company Sponsored		3%	3%	4%	1%	6%	3%	29
	Visit friends/ Relatives		2%	3%	3%	2%		2%	39
	Organized sports		1%	4%				1%	19
	Career Cert/ Testing		0%				2%		19
	Total	Count	348	78	91	129	50	176	173



Motivation by Income

			TOTAL	036							
			TOTAL		Ι		Q26		ı		
			-	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q5A	Natural beauty		58%	50%	53%	56%	56%	60%	64%	64%	67%
	Short travel time		50%	44%	44%	46%	33%	61%	62%	56%	38%
	Pleasure		49%	39%	44%	41%	51%	51%	49%	54%	67%
	Relax		36%	33%	37%	39%	40%	33%	32%	38%	25%
	Previous trip		32%	33%	23%	39%	18%	31%	32%	56%	33%
	Shopping		30%	33%	35%	20%	24%	31%	32%	26%	50%
	Price		26%	22%	19%	22%	24%	33%	38%	23%	25%
	Safe		22%	33%	19%	20%	22%	13%	34%	23%	29%
	Water sports		21%	11%	28%	24%	13%	22%	23%	23%	17%
	Recomm- friend/family/trvl agnt		17%	17%	21%	20%	13%	15%	11%	15%	29%
	Company/ Business Trip		12%		19%	17%	9%	18%	8%	8%	8%
	Honeymoon		5%		5%	7%	11%	7%	4%	3%	
	Married/ Attn wedding		5%	11%		2%	15%	7%	6%		
	Scuba		5%		9%		4%	1%	8%		21%
	Golf		4%		2%	5%		3%	8%	15%	
	Other		3%	11%	2%			7%	4%		
	Company Sponsored		3%		2%	5%	2%	1%	8%	3%	
	Visit friends/ Relatives		2%	6%		7%		1%		3%	8%
	Organized sports		1%	6%	2%						4%
	Career Cert/ Testing		0%				2%				
	Total	Count	348	18	43	41	55	67	53	39	24



SECTION 3 EXPENDITURES

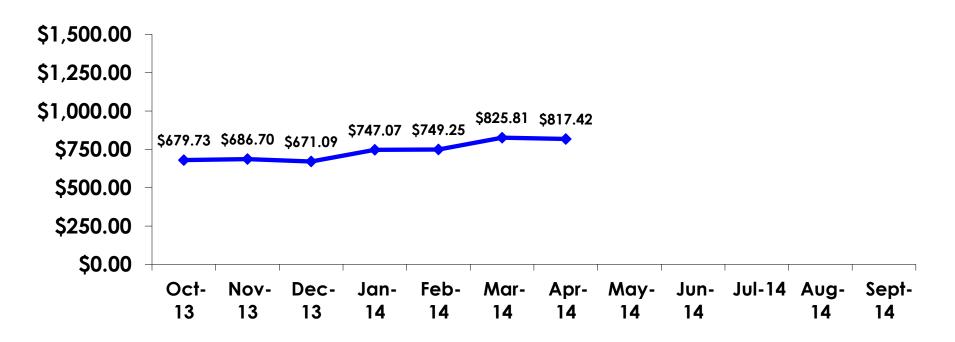


Prepaid Expenditures ¥102.51/US\$1

- \$1,921.91 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$34,143 = maximum (highest amount recorded for the entire sample)
- \$817.42 = overall mean average <u>per person</u> prepaid expenditures



PREPAID EXPENDITURES Per Person



YTD=\$739.57



Breakdown of Prepaid Expenditures ¥102.51=\$1

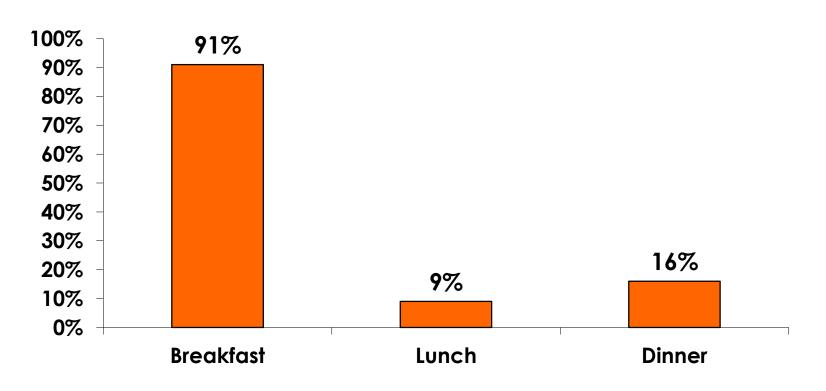
(Filter: Only those who responded/ Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,909.00
Air & Accommodation w/ daily meal package	\$3,154.60
Air only	\$929.53
Accommodation only	\$399.96
Accommodation w/ daily meal only	\$-
Food & Beverages in Hotel	\$153.64
Ground transportation – Japan	\$85.05
Ground transportation – Guam	\$79.57
Optional tours/ activities	\$407.54
Other expenses	\$506.60
Total Prepaid	\$1,921.91



PREPAID MEAL BREAKDOWN

Air/ Accommodations with Daily Meal Pkg. n=45

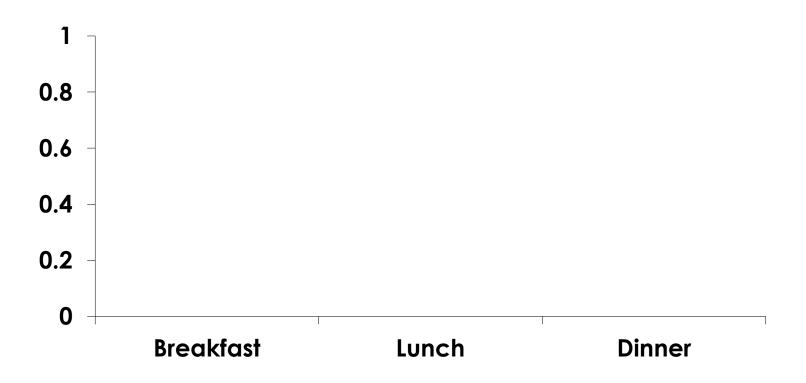


Mean=\$3,154.60 per travel party



PREPAID MEAL BREAKDOWN

Accommodations with Daily Meal Pkg. N=xx

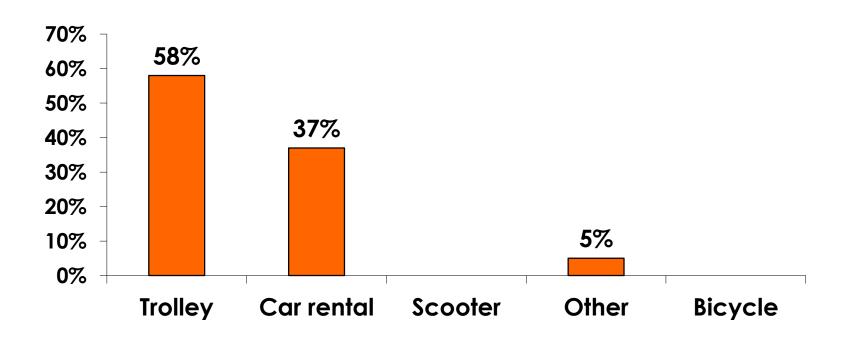


Mean=\$xxxx per travel party



PREPAID GROUND TRANSPORTATION

n=19



Mean=\$79.57 per travel party

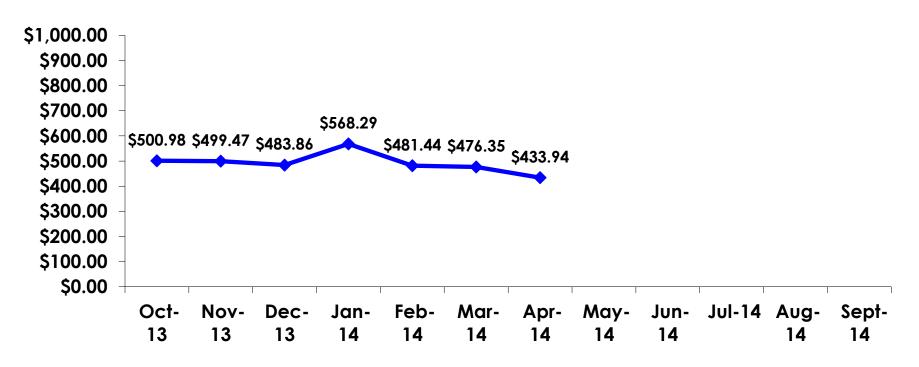


On-Island Expenditures

- \$788.28 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$6,500 = Maximum (highest amount recorded for the entire sample)
- \$433.94 = overall mean average <u>per person</u> onisland expenditure



ON-ISLAND EXPENDITURES Per Person

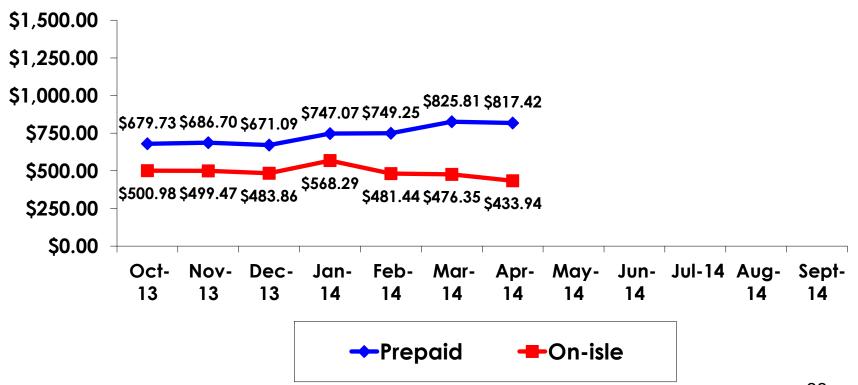


YTD = \$492.04



PREPAID/ ON-ISLE EXPENDITURES – Per Person

Prepaid YTD = \$739.57 On-Isle YTD = \$492.04





Total On-Island Expenditure by Gender & Age

TOTAL GENDE					GENDER								
						Ma	ile		Female				
						AGE			AGE				
		-	Male	Female	18-24	25-34	35-49	50+	18-24	25-34	35-49	50+	
PER PERSON	Mean	\$433.94	\$414.65	\$453.44	\$481.56	\$431.61	\$349.97	\$497.33	\$339.40	\$559.98	\$419.07	\$613.10	
	Median	\$328	\$300	\$358	\$400	\$350	\$295	\$350	\$300	\$472	\$333	\$463	
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20	\$0	\$125	
	Maximum	\$2,684	\$2,500	\$2,684	\$2,000	\$1,400	\$1,157	\$2,500	\$1,600	\$2,684	\$1,400	\$1,500	



On-Island Expenditure Categories by Gender & Age

		TOTAL	GEN	DER		AC	Ε	
		1	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$31.91	\$37.95	\$25.79	\$11.88	\$20.29	\$52.09	\$33.04
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$40.10	\$46.04	\$34.10	\$19.18	\$50.30	\$51.22	\$26.36
	Median	\$10	\$20	\$0	\$0	\$20	\$20	\$0
F&B RESTRNT	Mean	\$107.55	\$150.70	\$63.89	\$54.79	\$79.46	\$163.44	\$98.86
	Median	\$35	\$70	\$0	\$0	\$30	\$65	\$ 5
OPT TOUR	Mean	\$99.98	\$120.05	\$79.68	\$74.69	\$97.87	\$134.21	\$55.96
	Median	\$0	\$0	\$0	\$0	\$21	\$0	\$0
GIFT- SELF	Mean	\$232.10	\$242.02	\$222.06	\$71.83	\$252.77	\$266.32	\$362.60
	Median	\$50	\$50	\$50	\$0	\$100	\$100	\$50
GIFT- OTHER	Mean	\$126.11	\$145.89	\$106.11	\$84.09	\$122.25	\$158.66	\$116.40
	Median	\$81	\$100	\$50	\$20	\$100	\$100	\$50
TRANS	Mean	\$16.11	\$22.61	\$9.55	\$6.46	\$15.58	\$24.57	\$10.70
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$125.59	\$105.92	\$145.49	\$127.16	\$95.03	\$126.02	\$177.62
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL	Mean	\$788.28	\$884.07	\$691.39	\$459.70	\$730.47	\$975.75	\$935.54
	Median	\$500	\$600	\$500	\$365	\$550	\$700	\$500



On-Island Expenditures First Timers & Repeaters

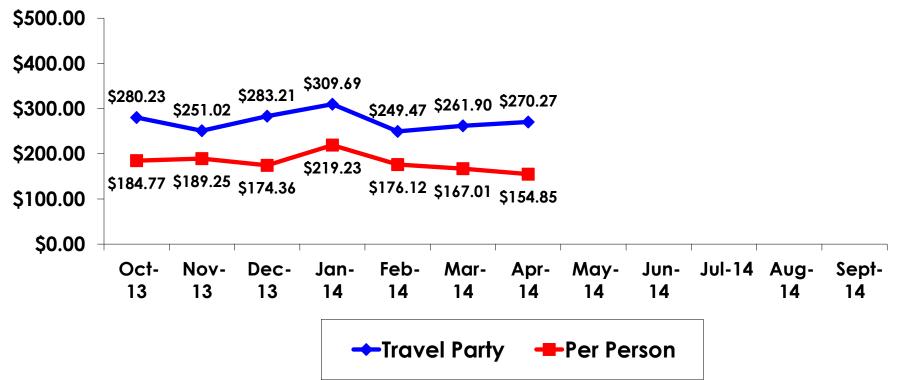
		TOTAL	TRIPS T	O GUAM
		1	1st	Repeat
F&B HOTEL	Mean	\$31.91	\$21.19	\$45.87
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$40.10	\$30.47	\$52.65
	Median	\$10	\$1	\$20
F&B RESTRNT	Mean	\$107.55	\$78.63	\$145.21
	Median	\$35	\$30	\$50
OPT TOUR	Mean	\$99.98	\$101.95	\$97.40
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$232.10	\$143.29	\$347.78
	Median	\$50	\$2	\$100
GIFT- OTHER	Mean	\$126.11	\$108.19	\$149.45
	Median	\$81	\$74	\$100
TRANS	Mean	\$16.11	\$11.13	\$22.61
	Median	\$0	\$0	\$0
OTHER	Mean	\$125.59	\$158.35	\$82.92
	Median	\$0	\$0	\$0
TOTAL	Mean	\$788.28	\$659.08	\$956.59
	Median	\$500	\$500	\$601



ON-ISLE EXPENDITURES – Per Day



Per Person YTD = \$180.76



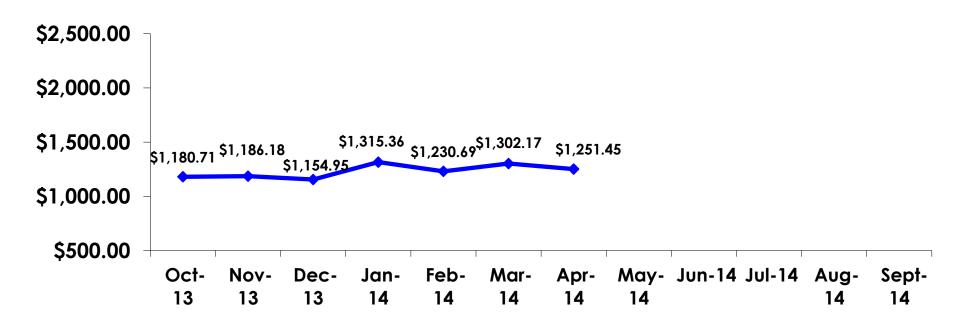


Total Expenditures Per Person (Prepaid & On-Island)

- \$1,251.45 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$11,814 = Maximum (highest amount recorded for the entire sample)



TOTAL EXPENDITURES Per Person



YTD=\$1,231.64



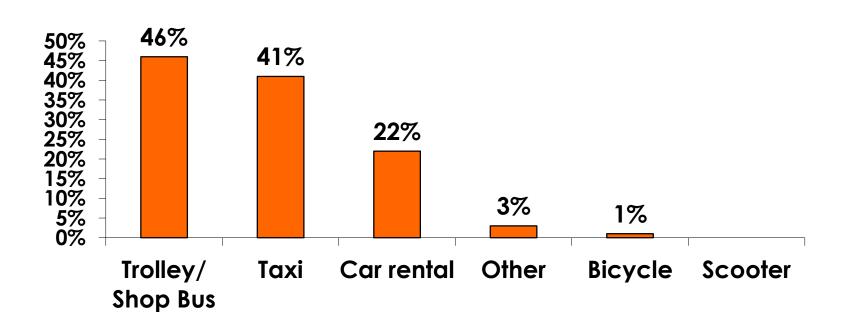
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$31.91
Food & beverage in fast food restaurant/convenience store	\$40.10
Food & beverage at restaurants or drinking establishments outside a hotel	\$107.55
Optional tours and activities	\$99.98
Gifts/souvenirs for yourself/companions	\$232.10
Gifts/ souvenirs for friends/family at home	\$126.11
Local transportation	\$16.11
Other expenses not covered	\$129.59
Average Total	\$788.28



Local Transportation

n=76



Mean=\$16.11 per travel party



Guam Airport Expenditures

- \$34.81 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$1,100 = Maximum (highest amount recorded for the entire sample)



Breakdown of Airport Expenditures

	MEAN \$
Food & Beverages	\$7.61
Gifts/Souvenirs Self	\$11.21
Gifts/Souvenirs Others	\$15.77
Total	\$34.81



SECTION 4 VISITOR SATISFACTION

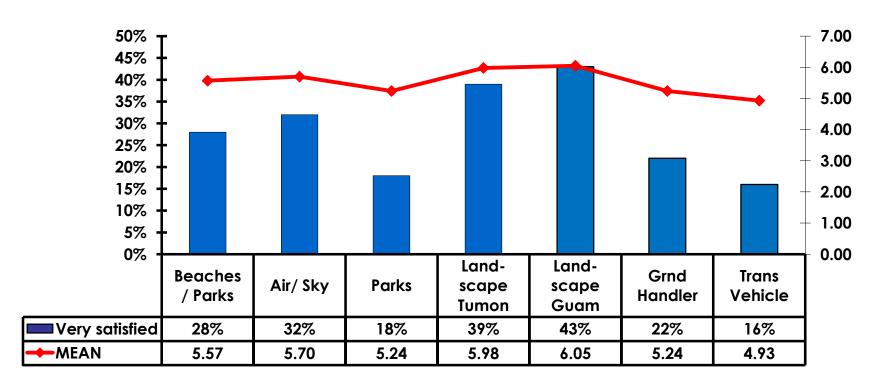


Satisfaction Scores Overall



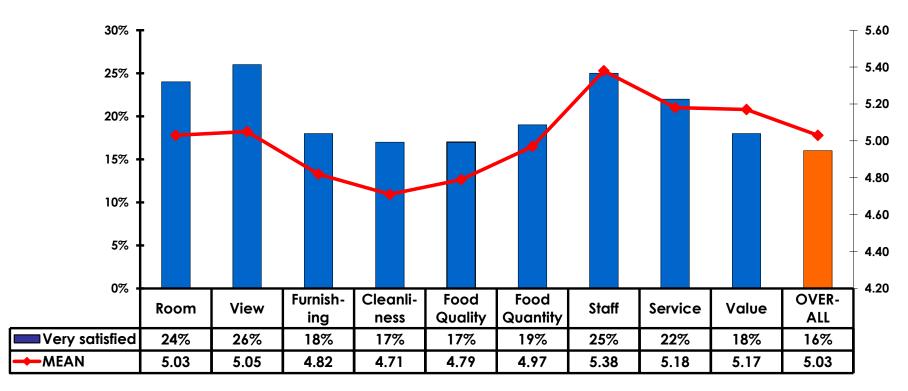


Satisfaction Quality/ Cleanliness



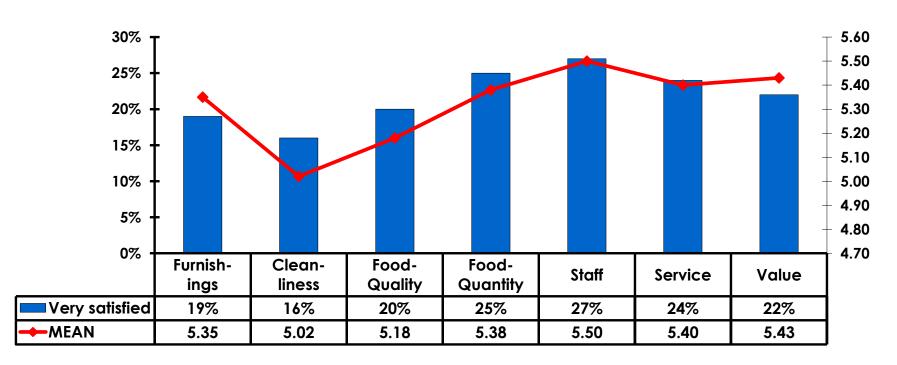


Quality of Accommodations



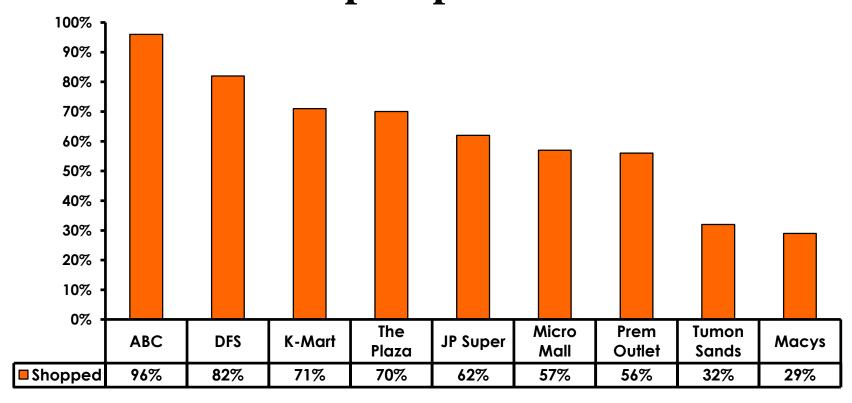


Quality of Dining Experience





Visits to Shopping Centers/Malls on Guam Top responses



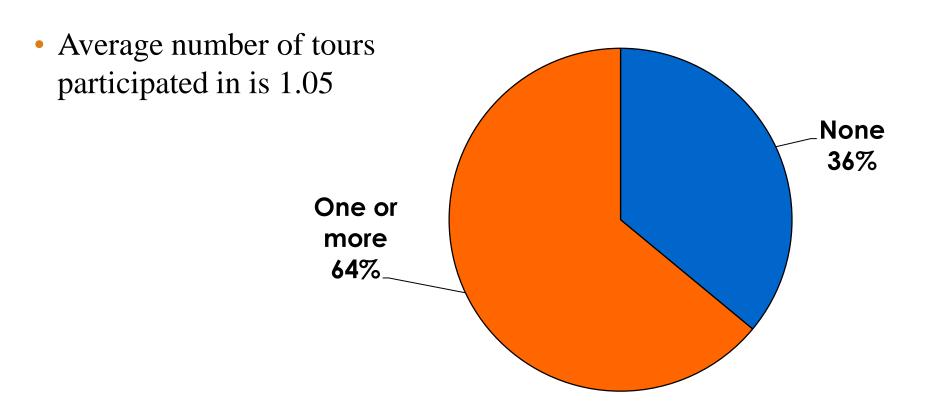


Satisfaction with Shopping

Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 54%	Score of 6 to 7 = 52%
Score of 4 to 5 = 55%	Score of 4 to 5 = 55 %
Score 1 to 3 = 3 %	Score 1 to 3 = 4%
MEAN = 5.48	MEAN = 5.42

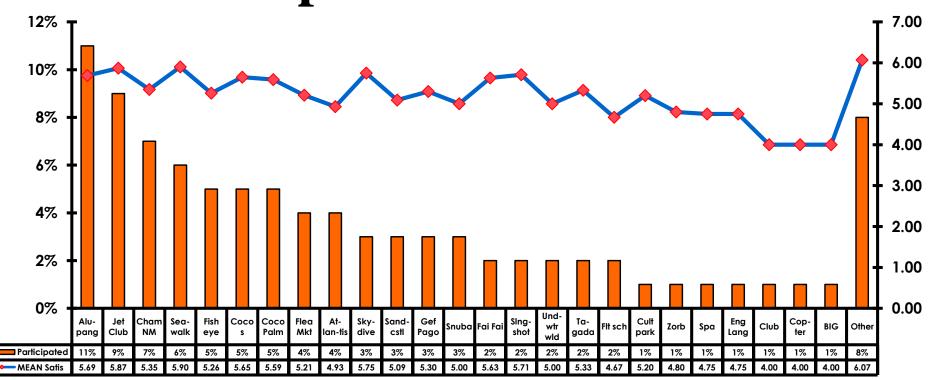


Optional Tour Participation





Optional Tours Participation & Satisfaction





Day Tours Satisfaction

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 54%	Score of 6 to 7 = 54%
Score of 4 to 5 = 42%	Score of 4 to 5 = 44%
Score 1 to 3 = 4%	Score 1 to 3 = 1%
MEAN = 5.43	MEAN = 5.40

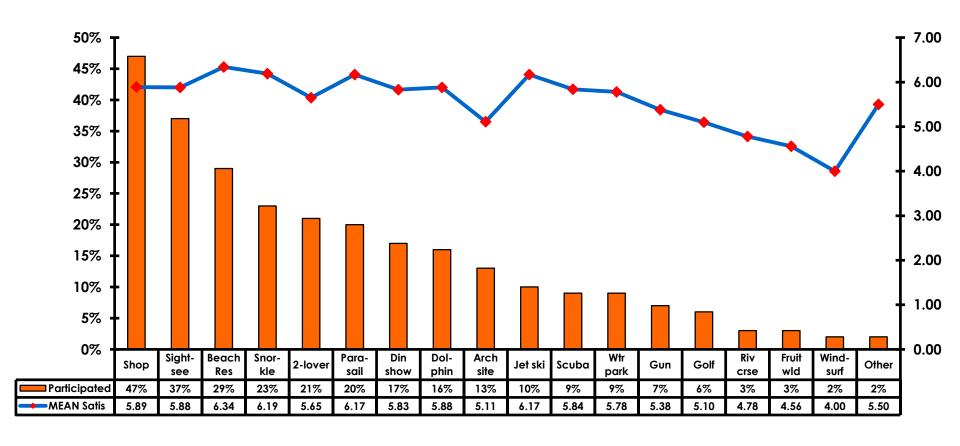


Night Tours Satisfaction

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 28%	Score of 6 to 7 = 28%
Score of 4 to 5 = 69%	Score of 4 to 5 = 70%
Score 1 to 3 = 2 %	Score 1 to 3 = 2 %
MEAN = 4.78	MEAN = 4.77

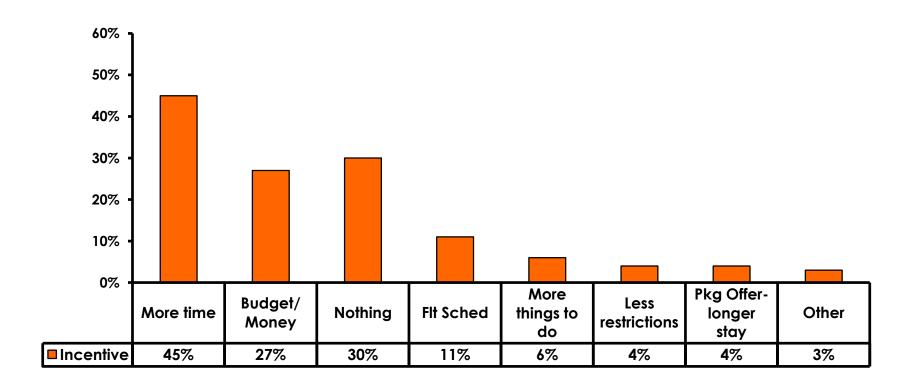


Satisfaction with Other Activities





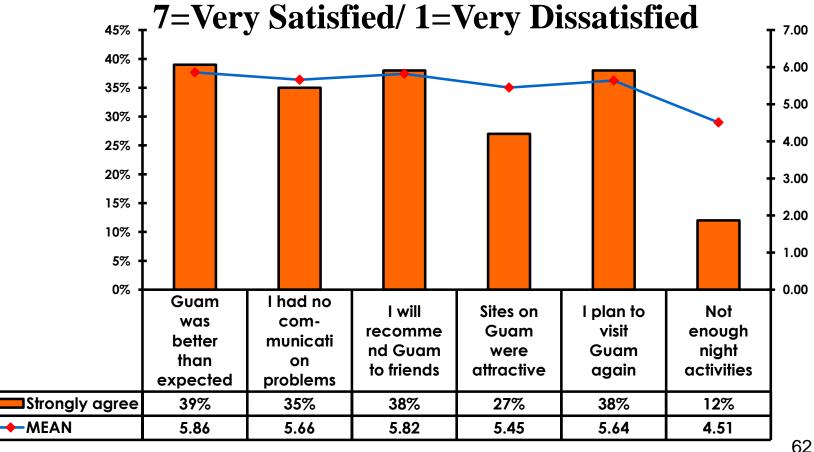
What would it take to make you want to stay an extra day in Guam?





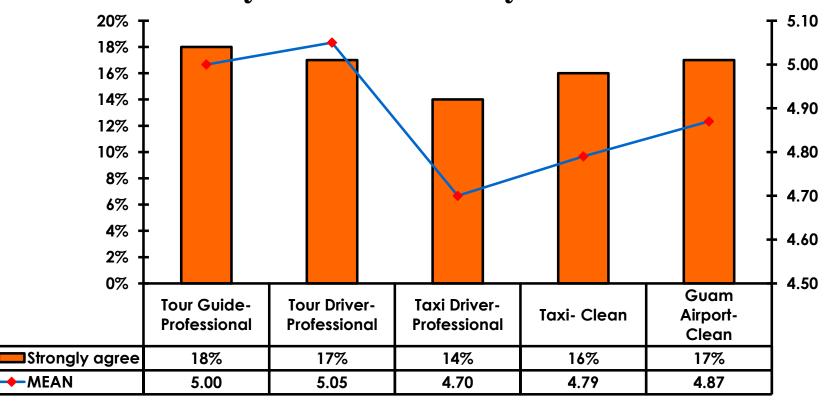
On-Island Perceptions







On-Island Perceptions

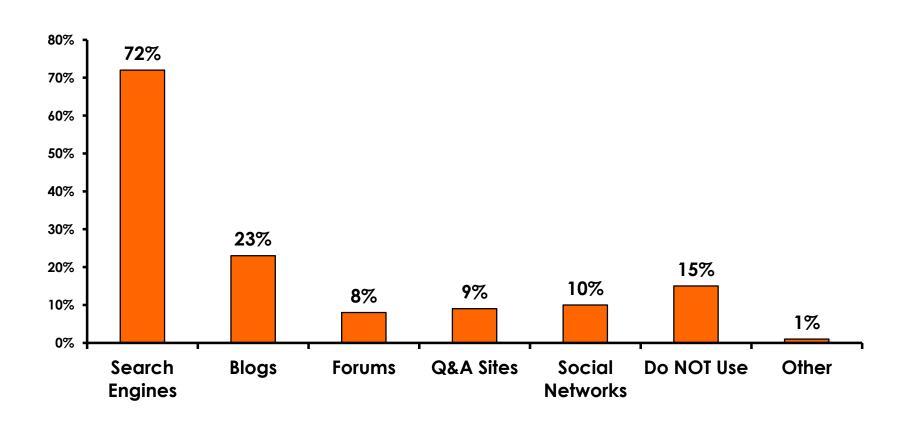




SECTION 5 PROMOTIONS

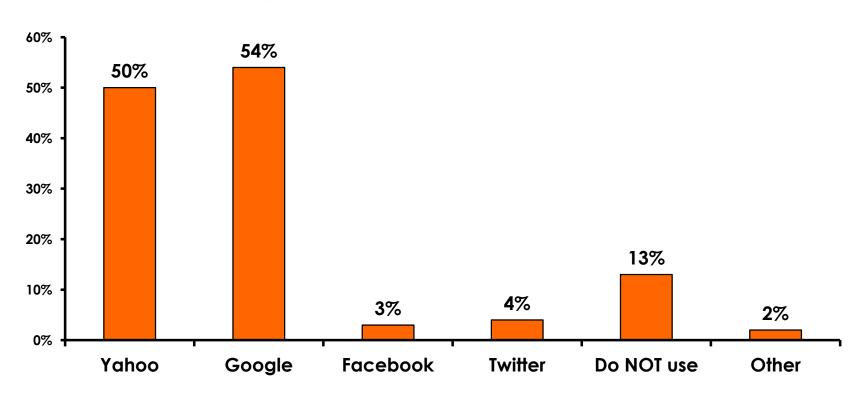


Internet- Guam Sources of Info



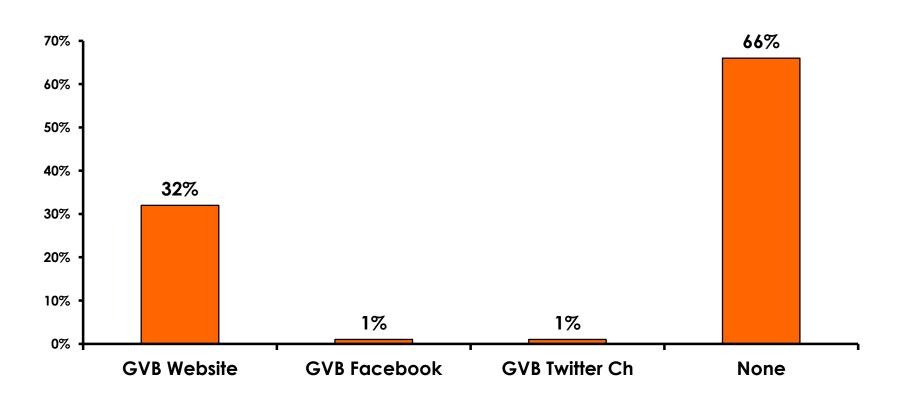


Internet- Things To Do Sources of Info



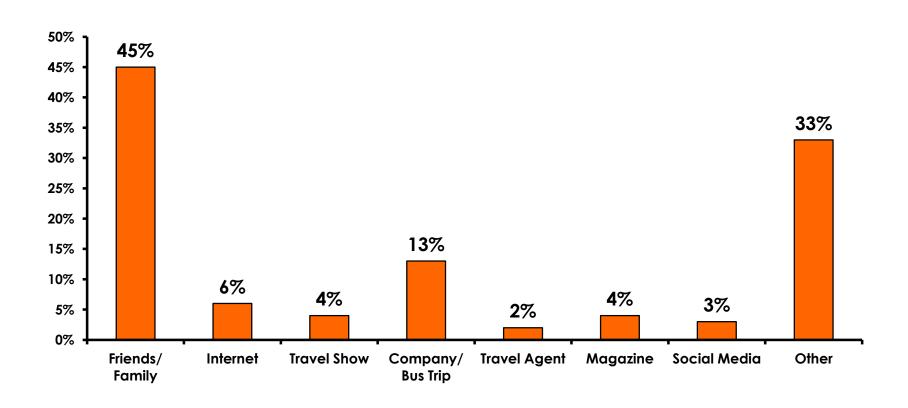


Internet- GVB Sources



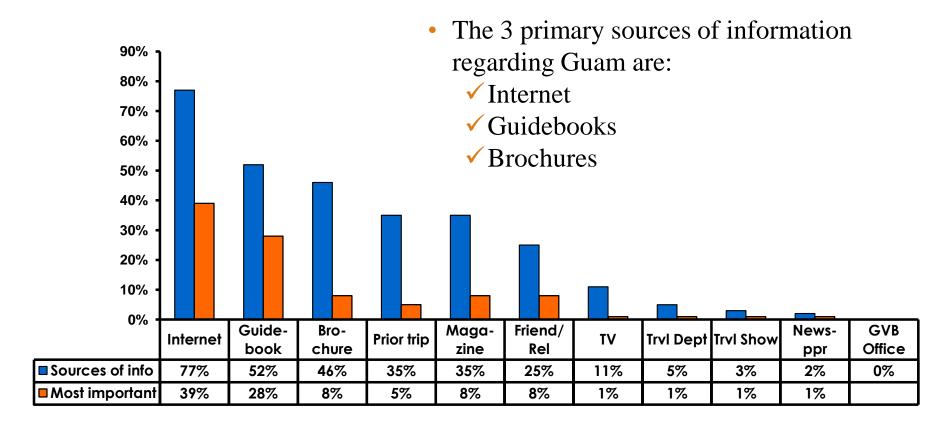


Travel Motivation-Info Sources



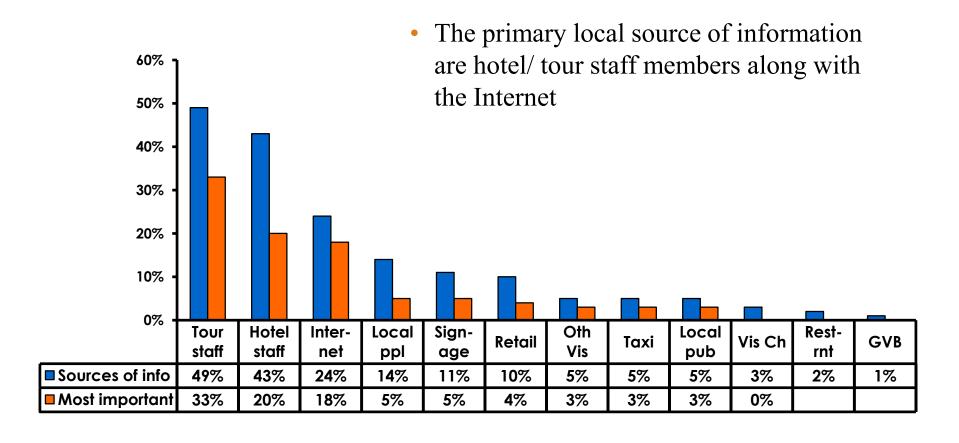


Sources of Information Pre-arrival





Sources of Information Post-arrival

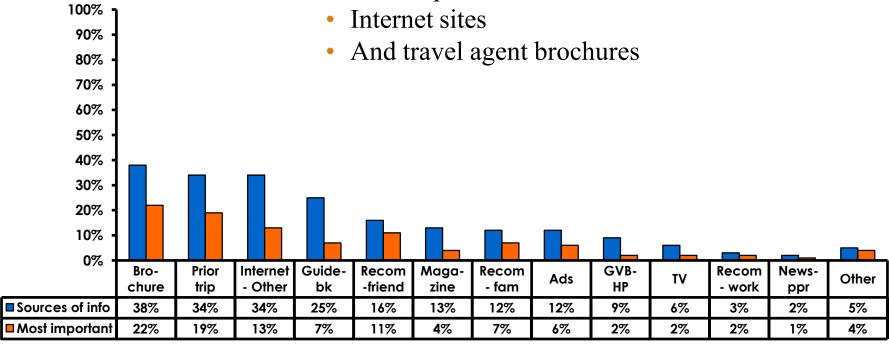




Sources of Information - Motivation

The primary motivational sources of information were.

Prior trip to Guam,

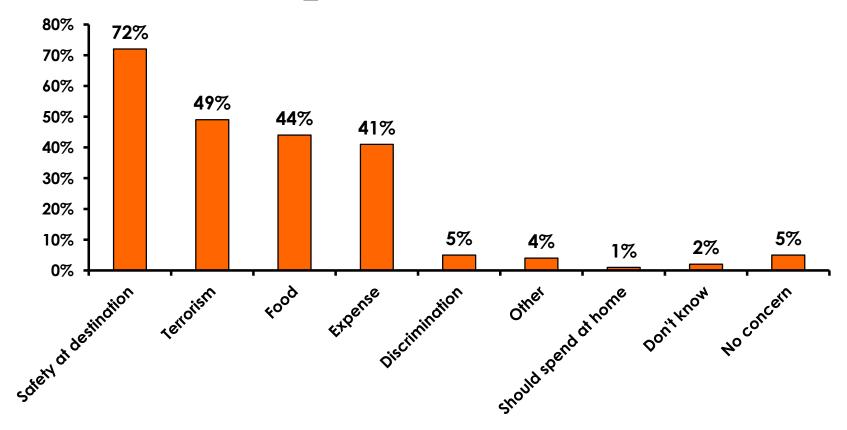




SECTION 6 OTHER ISSUES



Concerns about travel outside of Japan - Overall



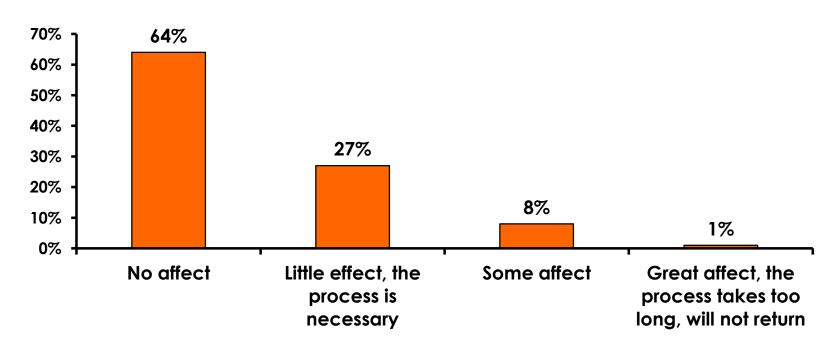


Concerns about travel outside of Japan - By Age & Income

	TOTAL AGE					Q26									
				18-24	25-34	35-49	50+	<y2.0 million<="" td=""><td>Y2.0M-Y3.0M</td><td>Y3.0M-Y4.0M</td><td>Y4.0M-Y5.0M</td><td>Y5.0M-Y7.0M</td><td>Y7.0M-Y10.0M</td><td>Y10.0M+</td><td>No Income</td></y2.0>	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		72%	62%	74%	81%	62%	50%	76%	73%	77%	79%	81%	59%	64%
	Terrorism		49%	41%	51%	51%	54%	56%	55%	58%	50%	55%	40%	41%	44%
	Food		44%	37%	40%	48%	50%	33%	40%	30%	59%	36%	51%	56%	40%
	Expense		41%	41%	41%	48%	20%	39%	50%	48%	43%	37%	38%	28%	52%
	Discrimination against Japanese		5%	5%	6%	5%	2%	6%	10%	13%	4%		4%	8%	
	No concerns		5%	6%	6%	3%	6%	6%	7%	3%	4%	3%	4%	10%	
	Other		4%		9%	3%	4%	6%		5%	4%	4%	9%		
	Don't know		2%	3%	2%	2%	2%		2%			4%	2%	3%	4%
	Should spend at home		1%	3%	2%			6%		3%	2%			3%	
	Total Co	ount	348	79	90	129	50	18	42	40	56	67	53	39	25



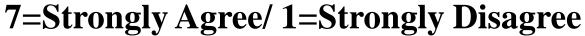
Security Screening/Immigration Process at Guam International Airport

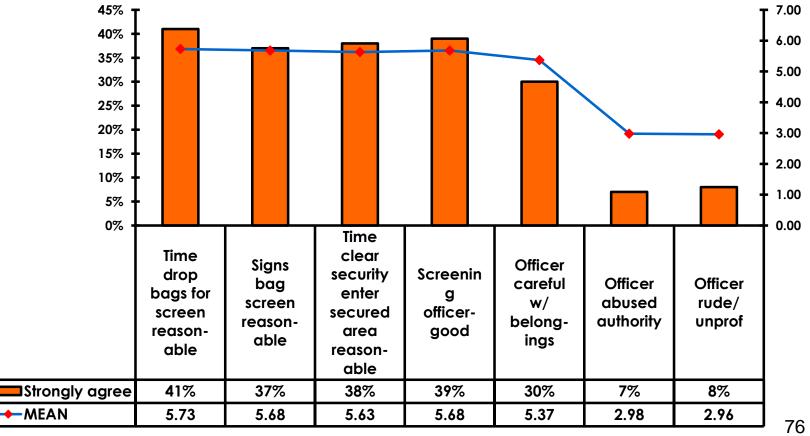




Airport Screening

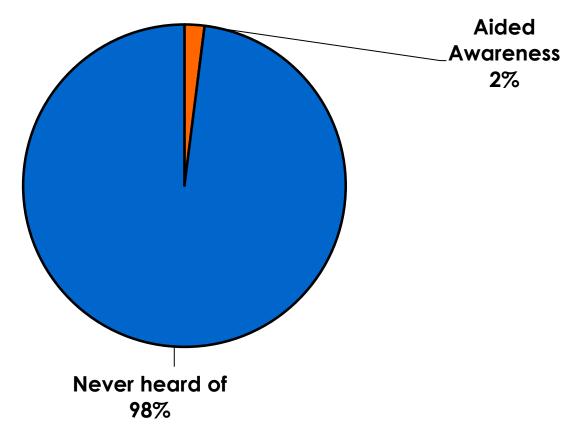
7pt Rating Scale







Shop Guam Festival





Shop Guam Festival - Impact n=7

