DATA SOURCE: The primary source of visitor arrival data presented in the statistical tables and graphs on pages 8-18 was the Department of Commerce Customs and Quarantine Declaration form. Because of the high no response rate of the voluntary statistical information portion of the form, the only data used is the number of visitor arrivals by origin.

VISITOR ARRIVAL DEFINITION: Visitor arrivals are defined as any person processed by the Customs and Quarantine Division, arriving either by air or ship, marking visitor on their declaration form. This may include transit or excursion passengers staying less than 24 hours. Visitor arrivals do not include airline/ship crew as well as military personnel on temporary duty arriving at military installations.
Message from the Governor & Lt. Governor

On behalf of our people of Guam, it is our pleasure to welcome you to the annual Statistical Report of the Guam Visitors Bureau.

The past few years, perhaps more than any other, has been years of tremendous challenges for Guam's visitor industry. The worldwide economic slump that has been felt by all nations has not spared our Island. The typhoons of 1992 and the earthquake of 1993 were crippling blows to the industry.

As we have stated earlier, the challenges that were put down before us were, in actuality, opportunities - opportunities for investment, opportunities for growth, opportunities for diversification. It was in response to these challenges that we chose to expand our tourism base beyond Japan to nations such as Korea, Taiwan, Australia, and Europe.

Today, we see the tourism slump at an end; indeed, by next year's report, we should finally see the culmination of one of our goals - the magic one million visitor mark. But lest we grow complacent, let us remember that the events of 1992 and 1993 can always happen again. And while we have every confidence that Guam and her tourism industry is strong enough to withstand any challenges, we must ensure that this confidence is justified.

For this reason, above all, we remain committed as always to the support of the activities of the Guam Visitors Bureau as it seeks to preserve what we have accomplished thus far, and to build upon that foundation.

Guam's potential for tourism has - still - barely been scratched. Let us all continue to work together to achieve that potential, not just for our visitors, but for us all.

Joseph F. Ada
Governor

Frank F. Blas
Lieutenant Governor
Once again, it is my pleasure to be a part of the presentation of the Guam Visitors Bureau Annual Report. It is self-evident that such statistical data is vital to the progress of our tourist industry. This report has been successful in revealing the strong attractions of our island as well as areas which need to be concentrated on for improvement. Such information is essential to the growing and prospering industry by which Guam lives.

Accurate and timely reports which are provided regularly by GVB help to guide us along the path to improving and perfecting our island as a tourist destination. These reports reveal the elements that could make or break our growth in tourism. Unfortunately, the reports cannot foresee the natural disasters that we often face. Last year’s natural disaster, the August, 1993 earthquake, set us back once again into a recovery period just as the previous year’s damage by typhoons did. Yet, we remain in good standing and continue to develop for the better.

Despite these setbacks, we can look forward to the continued growth in many ways with Guam’s tourism industry. The stream of visitors provides us an opportunity to proudly share our island’s beauty and culture with others.

For the future, we must continue to expand our base beyond Japan and develop additional markets such as from Korea, Taiwan, Australia, and Europe. Taiwan’s market along has risen substantially since 1988 and continues to grow especially with the implementation of the visa waiver program for the visitors arriving from Taiwan. This was certainly a step in the right direction, now we must continue to expand in other ways such as this. Developing a bigger market base should be our focal point in the coming years.

Tourism’s future is Guam’s future. There needs to be an island-wide understanding that our major industry, “tourism”, affects all of us in one way or another. Let’s all make it a point to welcome our visitors with open arms and to instill in them a feeling of warmth and goodwill which will bring them to return to Guam year after year as well as convey to others pleasant memories of their experience on our beautiful island.

JOE T. SAN AGUSTIN  
Speaker  
22nd Guam Legislature
Hafa Adai! For the third year in a row, our island's most important industry was seriously affected by events beyond our control. As we were recovering from the Gulf War, multiple typhoons and power blackouts, we felt the effects of the continuing recession in Japan and the "Great 'Quake'" of 1993.

Our great fortune was that no lives were lost and that we were spared the tremendous damage that usually accompanies earthquakes of that magnitude. Overall however, there were few bright spots in our industry's most troubled year. The recession, combined with the belief by travelers that we suffered tremendous damage, was apparent until year's end. We closed the year facing low occupancy rates, reduced visitor spending, heavy price-cutting by competitors and lower tax revenues.

Among the positives for 1993 was the continued growth of arrivals from Korea and Taiwan. The Bureau's hard work to expand and diversify our market is paying off. Another plus was the Legislature's very visible support for the industry. My bill to temporarily decrease our Hotel Occupancy Tax was unanimously approved. The Legislature also gave the Bureau the use of hundreds of thousands of dollars to do a large scale advertising campaign in Japan.

During JATA '93, Guam officials learned first-hand from industry experts what needs to be done to improve our product and we are proceeding with better lighting for Tumon, cleaning and beautifying our island and placing a greater emphasis on providing good customer service.

Overall, statistics will show that 1993 wasn't a very good year, but there is reason to be optimistic. By year's end, arrivals looked to be on the rebound; we have identified our problems and are working on solutions; and the general public is more aware than ever of the importance of our visitor industry.

Congratulations to the Bureau and its Research Department for tracking and reporting visitor industry statistics. The massive Survey of Tourism Attitudes of Residents contains a wealth of information which will be of significant benefit for years and should be a permanent fixture on all reference shelves. All the indicators are positive . . . let's keep our fingers crossed that 1994 will be much, much better than 1993!

JOHN PEREZ AGUON
Vice-Speaker
Chairman, Committee on Tourism & Transportation
22nd Guam Legislature
Hafa Adai and Greeting from the Guam Visitors Bureau! 1993 was begun with the expectation that Guam -- beset with the adverse impact of the Gulf War in 1991 and Typhoon Omar and a string of other typhoons in 1992 -- was certainly going to rebound as far as the tourism industry was concerned. We had begun the year prepared to face the challenges ahead, and to a great extent, our efforts were paying off. The true test of our resiliency and strength came when on August 8, 1993, an earthquake measuring 8.2 struck our paradise island, effectively wreaking havoc on this fragile industry we call tourism.

Despite the potentially devastating consequences, once again our community united to ensure that Guam’s recovery was swift and further efforts intensified to protect our tourism industry. Thanks to this united effort between the industry, government and residents, we closed the chapter on 1993 with the second highest number of visitor arrivals ever with 784,018 tourists gracing our island. Through these challenges, we have been taught that, with or without adversities, tourism’s success on Guam can be achieved through a strong cooperative effort. And while our expectations of 1993 may have been hampered, our determination for continuous improvement and study of our product and services has been strengthened.

We are pleased to present the Bureau’s Annual Statistical Report, which speaks of our efforts through statistics and information garnered on Guam’s visitor industry. Research plays a critical role in providing all of us with the necessary information to more effectively fulfill our mission -- that is, to promote Guam as a destination of choice. And the Bureau’s Research Department, established just three years ago, has served us well as the mechanism through which this wealth of information is generated. We have continued studies on Guam’s primary market, Japan, in an effort to better understand and market to our Japanese visitors. And as evidenced this year with Korea’s placement as Guam’s number two market and explosive growth by Taiwan, plans are underway for specific studies on visitors from those respective markets.

We extend our Si Yu’os Ma’ase to all who have contributed to this Report and acknowledge most especially our Research Committee, comprised of public and private sector representatives who have provided invaluable guidance and direction and who exemplify the spirit of cooperation which lends to tourism’s success.

PETER P. “SONNY” ADA
Chairman of the Board

MICHAEL D. CARLSON
General Manager
Message from the Chairman, Research Committee and the Research Manager

Visitor arrival counts for 1993 totaled 784,018. Historically this accomplishment is only overshadowed by 1992 visitor arrival total of 876,742. Even though 1993 visitor arrivals reflect an 11% downturn, it will be a year to remember as a time when Guam’s tourism industry’s resiliency and determination was put to the test.

In the first half of 1993 Guam showed a strong, steady recovery from the impact of the typhoons of 1992. The great earthquake of August 1993, despite the minimal loss in physical terms, devastated the anticipated growth in visitor arrivals. An immediate and strong marketing response from the policy makers, the Bureau and the Industry saw not only a strong robust recovery but also witnessed a boom in visitor arrivals toward the end of the year.

Certainly in 1993 the stage has been set for sustained growth in the years to come. Guam’s hotel room capacity which had in the past been a constraining factor has increased with new hotels opening their doors. This increasing capacity means Guam will now have the ability to cater to ever larger numbers of visitors. This year also witnessed the emergence of new markets such as Korea and Taiwan. Though Japan will always continue to be our core market the nurturing of these newly developing markets will be crucial to the diversification of Guam’s tourism base. All indicators project a strong and dynamic growth in the years to come, specially from our primary Asian markets of Japan, Korea and Taiwan.

The Research Department serves its primary mission of quantifying Guam’s tourism industry by generating numerous statistical reports (such as the monthly statistical reports, quarterly reports, and many other statistical reports). The department also provides feedback, recommendations and market information to the Bureau’s marketing division and the industry at large. This is accomplished by exit survey studies, specific market studies, and special studies commissioned to measure effectiveness of various marketing campaigns.

We sincerely hope that this Annual Statistical Review serves its purpose to provide useful and meaningful information and we along with the Research Department staff look forward to a very dynamic and successful 1994.

[Signatures]
Dave Ecret
Chairman, Research Committee

Hanif Nensy
Administrator, Research & Evaluation
Visitor Arrival Summary

1993 Visitor Arrivals Second Highest. Although visitor arrivals for 1993 were down 11%, 1993 total visitors was the second highest recorded. Guam received 784,018 visitor arrivals in 1993, a decrease of 92,724 from 1992's figures. After struggling from a banner 1992, an earthquake measuring 8.2 on the Richter Scale rocked the island on August 8th. This slowed the tourism industry's recovery from the previous year's natural disaster - typhoons. As in 1991 and 1992, strong growth in the Korean and Taiwanese visitor arrivals helped buffer large decreases in Japanese arrivals.

Annual Visitor Arrivals 1984-1993

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Visitors</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1984</td>
<td>368,620</td>
<td>+5%</td>
</tr>
<tr>
<td>1985</td>
<td>377,941</td>
<td>+3%</td>
</tr>
<tr>
<td>1986</td>
<td>407,061</td>
<td>+8%</td>
</tr>
<tr>
<td>1987</td>
<td>483,956</td>
<td>+19%</td>
</tr>
<tr>
<td>1988</td>
<td>585,799</td>
<td>+21%</td>
</tr>
<tr>
<td>1989</td>
<td>668,827</td>
<td>+14%</td>
</tr>
<tr>
<td>1990</td>
<td>780,404</td>
<td>+17%</td>
</tr>
<tr>
<td>1991</td>
<td>737,260</td>
<td>-6%</td>
</tr>
<tr>
<td>1992</td>
<td>876,742</td>
<td>+19%</td>
</tr>
<tr>
<td>1993</td>
<td>784,018</td>
<td>-11%</td>
</tr>
</tbody>
</table>

Monthly Visitor Arrivals 1992-1993

1993 Fourth Quarter Arrivals Break 1992 Marks. Growth in visitor arrivals from January through September averaged -10% compared to 1992. Growth from October to December was +3%. March peaked the season with 77,668 while post earthquake September dropped to 48,530.

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>1992</td>
<td>83,322</td>
<td>88,617</td>
<td>90,364</td>
<td>74,805</td>
<td>72,959</td>
<td>78,763</td>
<td>79,367</td>
<td>73,640</td>
<td>50,180</td>
<td>59,359</td>
<td>58,078</td>
<td>67,298</td>
</tr>
<tr>
<td>1993</td>
<td>76,633</td>
<td>74,349</td>
<td>77,668</td>
<td>55,396</td>
<td>65,237</td>
<td>65,786</td>
<td>75,625</td>
<td>53,324</td>
<td>48,530</td>
<td>59,602</td>
<td>59,415</td>
<td>72,453</td>
</tr>
<tr>
<td>Change</td>
<td>-8%</td>
<td>-16%</td>
<td>-14%</td>
<td>-26%</td>
<td>-11%</td>
<td>-16%</td>
<td>-5%</td>
<td>-28%</td>
<td>-3%</td>
<td>0%</td>
<td>+2%</td>
<td>+8%</td>
</tr>
</tbody>
</table>
## Visitor Arrivals By Country 1989-1993

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>555,748</td>
<td>637,569</td>
<td>582,270</td>
<td>676,659</td>
<td>549,343</td>
<td>-19%</td>
<td>70%</td>
</tr>
<tr>
<td>Korea</td>
<td>4,514</td>
<td>7,645</td>
<td>19,008</td>
<td>39,121</td>
<td>68,604</td>
<td>+75%</td>
<td>9%</td>
</tr>
<tr>
<td>U. S.</td>
<td>42,678</td>
<td>51,544</td>
<td>50,258</td>
<td>59,558</td>
<td>61,169</td>
<td>+3%</td>
<td>8%</td>
</tr>
<tr>
<td>CNMI</td>
<td>22,990</td>
<td>30,469</td>
<td>27,860</td>
<td>24,291</td>
<td>26,455</td>
<td>+9%</td>
<td>3%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>966</td>
<td>2,189</td>
<td>8,574</td>
<td>12,443</td>
<td>23,562</td>
<td>+89%</td>
<td>3%</td>
</tr>
<tr>
<td>Philippines</td>
<td>3,960</td>
<td>4,424</td>
<td>5,484</td>
<td>8,189</td>
<td>7,914</td>
<td>-3%</td>
<td>1%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>1,990</td>
<td>2,161</td>
<td>3,019</td>
<td>8,608</td>
<td>6,613</td>
<td>-23%</td>
<td>.8%</td>
</tr>
<tr>
<td>Australia</td>
<td>5,194</td>
<td>7,784</td>
<td>6,040</td>
<td>6,660</td>
<td>4,404</td>
<td>-34%</td>
<td>.6%</td>
</tr>
<tr>
<td>Europe</td>
<td>2,793</td>
<td>2,643</td>
<td>1,998</td>
<td>2,643</td>
<td>2,278</td>
<td>-14%</td>
<td>.3%</td>
</tr>
<tr>
<td>Canada</td>
<td>715</td>
<td>655</td>
<td>639</td>
<td>884</td>
<td>726</td>
<td>-18%</td>
<td>.1%</td>
</tr>
<tr>
<td>Other</td>
<td>17,414</td>
<td>22,793</td>
<td>23,572</td>
<td>24,038</td>
<td>24,047</td>
<td>0%</td>
<td>3.1%</td>
</tr>
<tr>
<td><strong>TOTAL AIR</strong></td>
<td>658,962</td>
<td>769,876</td>
<td>728,722</td>
<td>863,094</td>
<td>775,115</td>
<td>-10%</td>
<td>98.9%</td>
</tr>
<tr>
<td><strong>TOTAL SEA</strong></td>
<td>9,865</td>
<td>10,528</td>
<td>8,538</td>
<td>13,648</td>
<td>8,903</td>
<td>-35%</td>
<td>1.1%</td>
</tr>
<tr>
<td><strong>TOTAL AIR &amp; SEA</strong></td>
<td>668,827</td>
<td>780,404</td>
<td>737,260</td>
<td>876,742</td>
<td>784,018</td>
<td>-11%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### Japan Arrivals Decrease
Visitor arrivals from Japan decreased 19% from 1992 levels. Guam’s market share of Japanese Overseas Travelers dropped 7 percentage points to 70%. In 1993, an average of 45,770 Japanese visitors arrived on island each month compared to 56,380 in 1992.

### Korean Arrivals Strong
In 1993 Korean visitor arrivals grew to 68,604 (+75%) from the previous year’s 39,121 total visitors. This strong growth accounts for 9% of the total market with an average of 5,700 visitors per month. In 1992, Korean visitors accounted for only 4% of the total market.

### U. S. Arrivals Show Slight Increase
U. S. visitor arrivals were up 3% in 1993 and comprised of nearly 8% of the total market. In 1993, an average of 5,000 visitors arrived on island from the U. S. each month.

### Taiwan Arrivals Almost Double
The “Guam Only” visa waiver program implemented in July 1993 and aggressive marketing contributed to Taiwan’s 89% visitor arrival increase over 1992. Taiwan visitors comprised of 3% of the total market with an average of 1,900 visitor arrivals per month.

### Australia Loses Direct Flights to Guam
Visitor arrivals from Australia recorded a 34% decrease. Average monthly visitor arrivals in 1992 were 555 while in 1993 they were 367.

### Hong Kong Arrivals Down
Visitor arrivals from Hong Kong decreased 23% with 6,613 visitors compared to 1992’s 8,608 visitors. These numbers are expected to increase with the hiring of a GVB marketing representative in Hong Kong.

---

![Visitor Arrivals By Country 1989-1993](image)
Japan Arrival Comparison 1989-1993

In 1993, visitor arrivals from Japan constituted 70% of Guam’s total and 69% of CNMI’s. Guam and the CNMI combined captured 7.8% of Japan’s outbound market. Visitor arrivals from Japan decreased 19% from 1992.

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Guam</td>
<td>555,748</td>
<td>637,569</td>
<td>582,270</td>
<td>676,659</td>
<td>549,343</td>
</tr>
<tr>
<td>CNMI</td>
<td>249,299</td>
<td>329,581</td>
<td>310,274</td>
<td>354,941</td>
<td>378,719</td>
</tr>
<tr>
<td>Total</td>
<td>805,047</td>
<td>967,150</td>
<td>892,544</td>
<td>1,031,600</td>
<td>928,062</td>
</tr>
<tr>
<td>Guam %</td>
<td>69%</td>
<td>66%</td>
<td>65%</td>
<td>66%</td>
<td>59%</td>
</tr>
</tbody>
</table>

Marina Islands Attract 1.3 Million Visitors.
Many of the visitors destined for Guam in August and September were routed to Saipan. This was due to their uncertainty of how safe Guam was after the earthquake. Visitor arrivals to the Mariana Islands decreased 4%. Guam’s portion of the region’s total arrivals fell 4% points from 1992 to 59%.

Taiwan Arrival Comparison 1989-1993

Although Guam led in visitor arrivals from Taiwan in 1989, 1990, 1991 and 1993, the CNMI received 7% (852) more Taiwanese in 1992. Guam experienced astonishing growth in the Taiwan market with an 89% increase over 1992. This growth is attributed to the Taiwan visa waiver implemented on July 16, 1993. Taiwanese visitors to the CNMI decreased by 29%.

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Guam</td>
<td>966</td>
<td>2,189</td>
<td>8,574</td>
<td>12,443</td>
<td>23,562</td>
</tr>
<tr>
<td>CNMI</td>
<td>301</td>
<td>813</td>
<td>4,475</td>
<td>13,295</td>
<td>9,459</td>
</tr>
<tr>
<td>Total</td>
<td>1,267</td>
<td>3,002</td>
<td>13,049</td>
<td>25,738</td>
<td>33,021</td>
</tr>
<tr>
<td>Guam %</td>
<td>76%</td>
<td>73%</td>
<td>66%</td>
<td>48%</td>
<td>71%</td>
</tr>
</tbody>
</table>

Korea Arrival Comparison 1989-1993

Although the CNMI received more Korean visitors from 1989 to 1991, Guam welcomed 5% more in 1992 and 13% more in 1993. Korean visitor arrivals to Guam increased by 75% while the CNMI received 63% more Koreans in 1993.

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Guam</td>
<td>4,514</td>
<td>7,645</td>
<td>19,008</td>
<td>39,121</td>
<td>68,604</td>
</tr>
<tr>
<td>CNMI</td>
<td>13,326</td>
<td>17,394</td>
<td>21,114</td>
<td>37,389</td>
<td>60,824</td>
</tr>
<tr>
<td>Total</td>
<td>17,840</td>
<td>25,039</td>
<td>40,122</td>
<td>76,510</td>
<td>129,428</td>
</tr>
<tr>
<td>Guam %</td>
<td>25%</td>
<td>31%</td>
<td>47%</td>
<td>51%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Visitor Arrivals to Micronesia 1989-1993

Tourism remains conservative in other Micronesian Islands. Total arrivals for these Micronesian destinations reached 67,000.
## Japan Visitor Arrivals By Region 1989-1993

<table>
<thead>
<tr>
<th>Region</th>
<th>1992</th>
<th>1993</th>
<th>% Change</th>
<th>% of JPN. Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kanto (Tokyo)</td>
<td>330,765</td>
<td>271,103</td>
<td>-18%</td>
<td>49%</td>
</tr>
<tr>
<td>Chubu (Nagoya)</td>
<td>69,921</td>
<td>72,484</td>
<td>+4%</td>
<td>13%</td>
</tr>
<tr>
<td>Kinki (Osaka)</td>
<td>132,452</td>
<td>100,083</td>
<td>-24%</td>
<td>18%</td>
</tr>
<tr>
<td>Kyushu</td>
<td>47,295</td>
<td>30,973</td>
<td>-35%</td>
<td>6%</td>
</tr>
<tr>
<td>Tohoku</td>
<td>33,710</td>
<td>26,381</td>
<td>-22%</td>
<td>5%</td>
</tr>
<tr>
<td>Hokkaido</td>
<td>25,880</td>
<td>18,287</td>
<td>-29%</td>
<td>3%</td>
</tr>
<tr>
<td>Chugoku</td>
<td>13,108</td>
<td>10,845</td>
<td>-17%</td>
<td>2%</td>
</tr>
<tr>
<td>Shikoku</td>
<td>13,575</td>
<td>5,495</td>
<td>-60%</td>
<td>1%</td>
</tr>
<tr>
<td>Okinawa</td>
<td>3,653</td>
<td>4,676</td>
<td>+28%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>6,300</td>
<td>9,016</td>
<td>+43%</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>676,659</td>
<td>549,343</td>
<td>-19%</td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

## Japan Market Share 1988-1993

[Graph showing market share from 1988 to 1993 with a decline from 5.6% to 4.6%]


<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>973,338</td>
<td>913,375</td>
<td>-6%</td>
<td>64,670</td>
<td>53,635</td>
<td>-17%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Feb</td>
<td>1,020,147</td>
<td>935,898</td>
<td>-8%</td>
<td>70,898</td>
<td>56,166</td>
<td>-21%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Mar</td>
<td>1,025,074</td>
<td>972,836</td>
<td>-5%</td>
<td>74,092</td>
<td>58,916</td>
<td>-20%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Apr</td>
<td>853,398</td>
<td>820,354</td>
<td>-4%</td>
<td>57,762</td>
<td>39,509</td>
<td>-32%</td>
<td>4.4%</td>
</tr>
<tr>
<td>May</td>
<td>911,632</td>
<td>879,244</td>
<td>-4%</td>
<td>58,572</td>
<td>48,463</td>
<td>-17%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Jun</td>
<td>997,172</td>
<td>953,009</td>
<td>-4%</td>
<td>59,786</td>
<td>48,007</td>
<td>-32%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Jul</td>
<td>1,044,281</td>
<td>1,052,870</td>
<td>+1%</td>
<td>51,618</td>
<td>53,890</td>
<td>-10%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Aug</td>
<td>1,172,332</td>
<td>1,239,728</td>
<td>+6%</td>
<td>31,989</td>
<td>30,777</td>
<td>-40%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Sep</td>
<td>1,048,079</td>
<td>1,087,077</td>
<td>+4%</td>
<td>40,392</td>
<td>38,392</td>
<td>-9%</td>
<td>3.0%</td>
</tr>
<tr>
<td>Oct</td>
<td>903,884</td>
<td>1,017,111</td>
<td>+13%</td>
<td>41,328</td>
<td>38,767</td>
<td>-15%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Nov</td>
<td>876,964</td>
<td>972,740</td>
<td>+11%</td>
<td>50,074</td>
<td>40,545</td>
<td>-8%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Dec</td>
<td>962,398</td>
<td>1,089,378</td>
<td>+13%</td>
<td>50,074</td>
<td>48,276</td>
<td>-4%</td>
<td>4.4%</td>
</tr>
</tbody>
</table>

**Market Share Expected to Rebound in 1994.** After a major earthquake in August, Guam's market share dipped to an all-time low in 1993 capturing 4.6% of the Japan Outbound Travelers. This is an 18% decrease from 1992's 5.6% market share. As depicted in the table below, August was the low month with 2.5% while March peaked at 6.1%.

**Arrivals Decline 19%.** The only metropolitan area to record growth was Chubu (Nagoya) at 4% over the previous year. Okinawa and 'Other Japan' also posted growth with 28% and 43%, respectively. Peak month for Japanese visitors was March with 58,916 while the low month was August with 30,777.

*Note: January data for November 1993 outbound figures are provisional and December 1993 outbound figure is preliminary.*
Japanese Visitor Profile

Aside from testing demographic profile, travel motivations, expenditures, activities and satisfaction, the Research Department with the assistance of the Research Committee included marketing effectiveness questions in the survey instrument.

Gender

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>58%</td>
<td>61%</td>
</tr>
<tr>
<td>Female</td>
<td>42%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Majority Males. Remaining consistent with Japan outbound proportions, Guam received more male visitors than females.

Age

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-29</td>
<td>59%</td>
<td>56%</td>
</tr>
<tr>
<td>30-49</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>50+</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Youth Market Strong. Over half of Guam’s are under age 30. Nearly 50% are between the ages of 30 and 49 with 8% over the age of 50.

Occupation

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salarymen</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Office Ladies</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Executives</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Students</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Owns Business</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Professionals</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Housewives</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Others</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Predominantly Office Workers. Almost two-thirds (57%) of Guam’s visitors from Japan are Salarymen and Office Ladies. The Student population is substantially lower than the previous year. The Executive group, e.g. males between the ages of 40 and 49, comprises of 9% of the visitor population.

Income

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Income</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>LT $19,048</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>$19,048-$28,571</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>$28,571-$38,095</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>$38,095-$47,619</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>$47,619-$66,667</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>$66,667-$95,238</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Over $95,238</td>
<td>7%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Low Income Visitor. Consistent with the majority of our visitors, the most frequent response was less than $29,000 per annum.

Results gathered would assist marketing in spotlighting the media that is most and least effective.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasure</td>
<td>72%</td>
<td>48%</td>
</tr>
<tr>
<td>Company Trip</td>
<td>16%</td>
<td>39%</td>
</tr>
<tr>
<td>Honeymoon</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Business</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Company Trips Increase, Pleasure Drops. Company trips have increased by over 50% while Pleasure dropped drastically to 48%.

Travel Arrangements

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Package</td>
<td>53%</td>
<td>51%</td>
</tr>
<tr>
<td>Company Package</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Group Package</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>F. I. T.*</td>
<td>11%</td>
<td>15%</td>
</tr>
</tbody>
</table>

F.I.T. Increases. Although a slight increase from the previous year, F.I.T. picked up where the package tours decreased. All three package tours recorded decreases from the previous year.

Travel Companions

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Mates</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>Friends</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Spouse</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Children</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Family</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Alone</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Office Mates Grow. Forty percent (40%) of the visitors from Japan traveled with office mates. The top three travel companions in FY1992 and FY1993 remained the same: Office Mates, Friends and Spouse.

Repeaters

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Repeaters Remain Steady.

Length of Stay

<table>
<thead>
<tr>
<th></th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-4 Days</td>
<td>64%</td>
<td>1-3 Days</td>
</tr>
<tr>
<td>5-6 Days</td>
<td>34%</td>
<td>4 Days</td>
</tr>
<tr>
<td>Over 7 Days</td>
<td>2%</td>
<td>Over 4 Days</td>
</tr>
</tbody>
</table>
### Travel Motivation

<table>
<thead>
<tr>
<th>Travel Motivation</th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beautiful Seas</td>
<td>53%</td>
<td>49%</td>
</tr>
<tr>
<td>Reasonable Tour Price</td>
<td>42%</td>
<td>33%</td>
</tr>
<tr>
<td>Water Sports</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Proximity</td>
<td>43%</td>
<td>35%</td>
</tr>
<tr>
<td>Shopping</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Beaches</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Climate</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Relaxation</td>
<td>N/A</td>
<td>19%</td>
</tr>
<tr>
<td>Recommended by Family/Friends</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Golf</td>
<td>N/A</td>
<td>11%</td>
</tr>
<tr>
<td>Previous Trip</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Recommended by Travel Agent</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Business Trip</td>
<td>N/A</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: %s do not add up to 100% due to multiple responses. "Other" for FY92 includes categories which were subsequently dropped.

**Beautiful Seas Continues to Draw Visitors.** Seas, proximity and price were the most frequently cited motivations. Although decreases were recorded in these motivating factors, they remain the top four reasons for traveling to Guam.

### Optional Tour Participation

<table>
<thead>
<tr>
<th>Optional Tour Participation</th>
<th>FY1992</th>
<th>FY 1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>59%</td>
<td>33%</td>
</tr>
<tr>
<td>Sight Seeing</td>
<td>52%</td>
<td>31%</td>
</tr>
<tr>
<td>Gun Shooting</td>
<td>40%</td>
<td>29%</td>
</tr>
<tr>
<td>Dinner Show Tour</td>
<td>30%</td>
<td>22%</td>
</tr>
<tr>
<td>Dog Racing</td>
<td>N/A</td>
<td>13%</td>
</tr>
<tr>
<td>Golf Tour</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Dinner Cruise Tour</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>Jet Ski Tour</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Diving Tour</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Sand Castle Tour</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>PIC Day Tour</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Atlantis Submarine</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Night tour</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Jungle Tour</td>
<td>N/A</td>
<td>5%</td>
</tr>
<tr>
<td>Fishing Tour</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Southern Island Tour</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Deluxe Dinner Tour</td>
<td>6%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Shopping, Sightseeing, Gun Shooting and Dinner Show Tour Decrease.** Participation rates for optional tours in 1993 reported significant decreases in the top four activities of 1992.
Airline Information

Weekly Airline Seat Capacity 1990-1993

Weekly Seat Capacity Declines 13%. Weekly airline seats to Guam decreased overall by 13% in 1993. Seats from Japan and Other Areas dropped 15% and 10%, respectively.

<table>
<thead>
<tr>
<th></th>
<th>1992</th>
<th>1993</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Flights/Week</td>
<td>270</td>
<td>222</td>
</tr>
<tr>
<td>Total Seats/Week</td>
<td>47,411</td>
<td>41,162</td>
</tr>
<tr>
<td>Total Seats/Year</td>
<td>2,465,372</td>
<td>2,140,424</td>
</tr>
</tbody>
</table>


Continental Micronesia Continues to Lead Market. Continental retains 55% (27,564) of all weekly airline seats serving Guam. This is a 7% decrease from the previous year. Japan Air Lines, Japan Asia Airways, and All Nippon Airways decreased in the number of seats to Guam.
Airline Seat Capacity From Japan 1993

| ANNUAL SEATS | WEEKLY SEATS
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Via Saipan</td>
</tr>
<tr>
<td>Direct</td>
<td>451,360</td>
</tr>
<tr>
<td>215,176</td>
<td>111,488</td>
</tr>
<tr>
<td>0</td>
<td>83,148</td>
</tr>
<tr>
<td>68,224</td>
<td>8,528</td>
</tr>
<tr>
<td>8,528</td>
<td>8,528</td>
</tr>
<tr>
<td>17,056</td>
<td>17,056</td>
</tr>
<tr>
<td>23,868</td>
<td>0</td>
</tr>
<tr>
<td>784,212</td>
<td>376,428</td>
</tr>
</tbody>
</table>

Seats to Guam Decrease. Direct seats to Guam and Via Saipan dropped 19% from 1992 total seats. Annual seats from Sapporo and Sendai reported decreases of 50 and 60%, respectively. Weekly service from Fukuoka via Saipan decreased (-86%) dramatically in 1993.

Weekly Airline Seat Capacity 1993

High Growth in Taipei, Kaoshiung & Seoul. With the implementation of the Taiwan Visa Waiver Program and consumer demand, there were significant increases in Taipei, Kaoshiung and Seoul. Service to Kaoshiung was added in 1993.
# Tourism & Employment Revenues

## Direct & Indirect Tourism Employment and Income Tax 1993

<table>
<thead>
<tr>
<th>SECTOR</th>
<th>TOTAL EMPLOYMENT</th>
<th>% TOURISM</th>
<th>TOURISM EMPLOYMENT</th>
<th>WEEKLY SALARY</th>
<th>ANNUAL INCOME</th>
<th>INCOME TAX @15%</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGRICULTURE</td>
<td>380</td>
<td>10%</td>
<td>38</td>
<td>$305.45</td>
<td>$603,569</td>
<td>$90,535</td>
</tr>
<tr>
<td>CONSTRUCTION</td>
<td>10,930</td>
<td>14%</td>
<td>1,530</td>
<td>$464.56</td>
<td>$36,965,225</td>
<td>$5,544,784</td>
</tr>
<tr>
<td>MANUFACTURING</td>
<td>2,040</td>
<td>25%</td>
<td>510</td>
<td>$435.49</td>
<td>$11,549,195</td>
<td>$1,732,379</td>
</tr>
<tr>
<td>TRANSPORTATION/PUBLIC UTILITIES</td>
<td>4,320</td>
<td>51%</td>
<td>2,203</td>
<td>$411.90</td>
<td>$47,189,900</td>
<td>$7,078,485</td>
</tr>
<tr>
<td>WHOLESALE</td>
<td>2,030</td>
<td>34%</td>
<td>690</td>
<td>$430.93</td>
<td>$15,466,250</td>
<td>$2,319,938</td>
</tr>
<tr>
<td>RETAIL</td>
<td>12,900</td>
<td>48%</td>
<td>6,192</td>
<td>$283.48</td>
<td>$91,276,024</td>
<td>$13,691,404</td>
</tr>
<tr>
<td>FIN., INS. &amp; REAL ESTATE</td>
<td>2,650</td>
<td>13%</td>
<td>345</td>
<td>$338.99</td>
<td>$6,072,024</td>
<td>$910,900</td>
</tr>
<tr>
<td>SERVICES</td>
<td>13,070</td>
<td>50%</td>
<td>6,535</td>
<td>$278.81</td>
<td>$94,745,214</td>
<td>$14,211,782</td>
</tr>
<tr>
<td>GOVERNMENT OF GUAM</td>
<td>12,890</td>
<td>15%</td>
<td>1,934</td>
<td>$594.59</td>
<td>$59,761,268</td>
<td>$8,967,190</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>61,210</strong></td>
<td></td>
<td><strong>19,977</strong></td>
<td><strong>$363,649,312</strong></td>
<td><strong>$67,638,772</strong></td>
<td><strong>$12,186,169</strong></td>
</tr>
</tbody>
</table>

Payroll Multiplier (1.24)

**TOTAL**

$814,574,460  $122,186,169


## Estimated Hotel & On-Island Spending Tax Generation 1993

<table>
<thead>
<tr>
<th></th>
<th>AVERAGE EXPENDITURE PER JAPANESE VISITOR</th>
<th>TOTAL EXPENDITURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL</td>
<td>48,276</td>
<td>$861</td>
</tr>
<tr>
<td>Prepaid in Japan</td>
<td>48,276</td>
<td>$972</td>
</tr>
<tr>
<td>On-island spending</td>
<td>48,276</td>
<td>$1,833</td>
</tr>
<tr>
<td><strong>Total Expenditure</strong></td>
<td>48,276</td>
<td>$1,833</td>
</tr>
</tbody>
</table>

Source: Selected Taxes, Department of Revenue & Taxation • Expenditures from GVB December 1993 Quarterly Exit Survey
Hotel Information

Total Rooms & Annual Occupancy Rates 1981-1993

Room Inventory Rises While Occupancy Rates Drop. Room inventory dropped by 219 rooms with the demolition of the Grand Hotel (99) and the Royal Palm (120). Although the August 8th earthquake affected many of the hotel facilities, the recovery of room inventory was quick. Source: Guam Hotel & Restaurant Association and the GVB Research Department (NOTE: Room inventory reflect tourist and non-tourist rooms.)

GHRA Monthly Average Occupancy Rate 1991-1993

1993 Occupancy Rates Below 1992. While slightly rebounding in the first quarter of 1993, following numerous typhoons in 1992, monthly hotel occupancies reflected a struggling year. Despite the quick recovery of room inventory, the months following the earthquake fell below 60%. Source: Guam Hotel & Restaurant Association.
GHRA Annual Average Room Rates 1990-1993

Average Room Rate Slightly Down. Competition, recovery from typhoons (1992) and a major earthquake (1993) brought the average room rate down 6%.

Total Occupancy Taxes Collected 1990-1993

Occupancy Tax Collection Down 20% from 1992. Over $14 million in occupancy taxes was collected in 1993. The decrease in collections are attributed to the drop in visitor arrivals due, decrease in room inventory, and the lowering of the hotel occupancy taxes from 13% to 10%. Occupancy taxes are assessed at 10% of the room rate and are deposited in the Tourist Attraction Fund (TAF). The TAF supports the Guam Visitor Bureau, the development and promotion of tourism related projects, and the maintenance of public parks, beaches and recreational facilities. In an effort to assist in the recovery of the Guam visitor industry, hotel occupancy taxes were lowered from 13% to 10% (P.L. 22-32) effective September 1, 1993-February 28, 1995. After March 1, 1995, a graduated tax would be implemented: 10% per day for rooms $90 or less and 13% per day for rooms $90 or more. Source: Department of Revenue & Taxation.
Existing Tumon Hotels

- Hotel Nikko Guam: 492 rooms
- Guam Hotel Okura: 366 rooms
- Guam Reef Hotel: 458 rooms
- Hyatt Regency Hotel: 448 rooms
- Pia Resort: 64 rooms
- Fujita Hotel: 283 rooms
- Sotetsu Tropicana Hotel: 198 rooms
- Guam Dai Ichi Hotel: 333 rooms
- Pacific Star Hotel: 436 rooms
- Pacific Islands Club: 502 rooms
- Regency Hotel: 63 rooms
- Sunroute Hotel: 69 rooms
- Tumon Bay Capital Hotel: 62 rooms
- Joinus Sotetsu Hotel: 50 rooms
- Holiday Plaza Hotel: 132 rooms
- Hilton International Hotel: 486 rooms
Tumon Hotels Under Construction

- HOTEL Leo Palace
  - 381 Rooms

- Tumon Plaza Hotel
  - 252 Rooms

- Holiday Inn
  - 291 Rooms

- Hilton International Hotel Expansion
  - 237 Rooms
Tumon Hotels Approved & Proposed

FAI FAI BEACH RESORT
1,100 ROOMS

REGENCY III & IV HOTELS
156 ROOMS

HASEKO HOTEL
500 ROOMS

ROYAL HOTEL
600 ROOMS

FUJITA HOTEL RENOVATION
550 ROOMS

UNITED OVERSEAS INVESTMENT
85 ROOMS

ASAHI BEER HOTEL
446 ROOMS

TUMON ROYAL HOTEL
200 ROOMS

PACIFIC ISLANDS CLUB
502 ROOMS

PAN PACIFIC HOTEL
400 ROOMS

HAKUBOTAN HOTEL
581 ROOMS

MATSUZATO GUAM RESORT
157 ROOMS
Existing Islandwide Development

ANDERSEN AIRFORCE BASE GOLF COURSE • 18 HOLES
GUAM INTERNATIONAL COUNTRY CLUB • 18 HOLES • 40 COTTAGES
HATSUHO INTERNATIONAL GOLF COURSE • 62 RMS • 27 HOLES
ADMIRAL NIMITZ GOLF COURSE • 18 HOLES

PALACE HOTEL GUAM • 405 RMS.
ALUPANG BEACH TOWERS • 94 RMS.
ONWARD AGANA BEACH HOTEL • 286 RMS.
ITC PLAZA HOTEL • 50 RMS

MANGILAO GOLF CLUB 18 HOLES
HOTEL PALMRIDGE • 66 RMS.
LEO PALACE RESORT COUNTRY CLUB 18 HOLES
GUAM TAKAYAMA GOLF COURSE • 18 HOLES
COUNTRY CLUB OF THE PACIFIC GOLF COURSE • 18 HOLES
TALOFOFO GOLF COURSE • 18 HOLES
Islandwide Development Under Construction

MARBO CAVES RESORT
1,200 RMS. • 18 HOLES OF GOLF
434 CONDOS PHASE (II)

LEO PALACE HILLS RESORT • 200 RMS. HOTEL,
2,500 CONDO UNITS • 45 HOLES OF GOLF
(18 HOLES OPEN)

CASCADA GOLF COURSE • 18 HOLES (APPROVED)
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The Guam Visitors Bureau would like to personally thank the members of the Research Committee for their continuing dedication. The Research Committee is a perfect example of the unity that GVB represents between the public and private sectors.

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