



# Survey of Tourism Attitudes of Residents 2017



- In January of 2017, the Guam Visitors Bureau (GVB) contracted Market Research & Development, Inc. (MR&D) to conduct the Survey of Tourism Attitudes among Residents (STAR).
- The Survey of Tourism Attitudes of Residents or STAR survey is designed to ascertain how the people of Guam feel about the tourism industry and the GVB. The survey is used to gain valuable insight regarding how residents feel towards the tourism industry, and its impact on Guam's economy and the community overall.

The STAR survey is intended to fulfill nine specific information objectives:

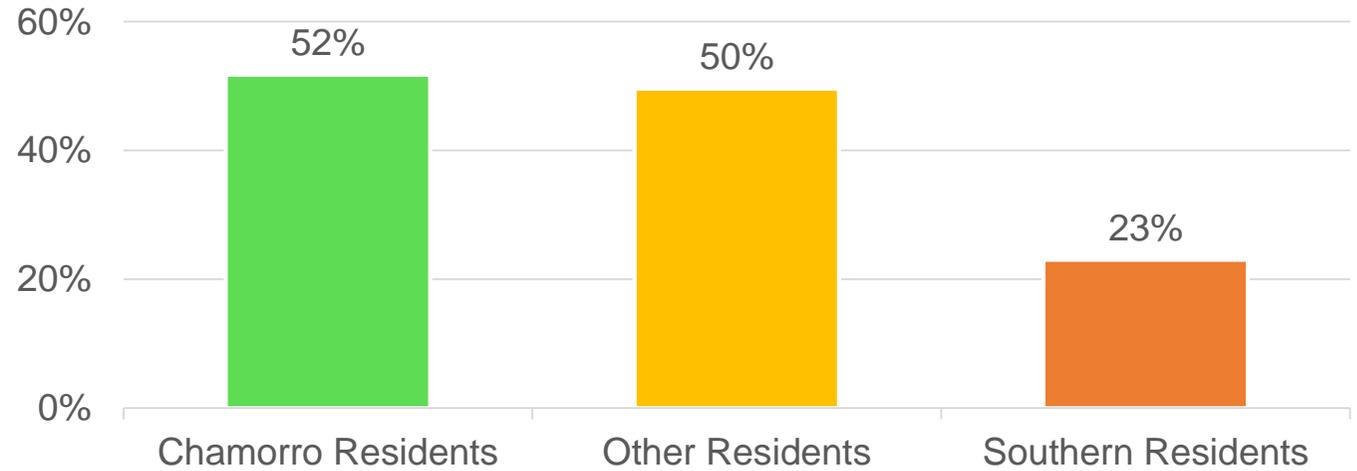
1. Identify a method for collecting and analyzing survey data that improves the relevancy and utility of the survey for GVB;
2. Ascertain the sentiments of all residents and specifically Chamorro residents and compare those sentiments to those recorded in prior surveys;
3. Determine the significant negative and positive attitudes with regard to the impact of the visitor industry on the community and Chamorro residents;
4. Assess public awareness of the importance of, and the benefits derived from, the visitor industry;
5. Measure community's awareness and knowledge of GVB community programs and Guam brand initiatives to preserve Guam's Chamorro language and cultural practices;
6. Ascertain the community's awareness and attitude towards the GVB's Community Outreach programs, events, and campaigns;
7. Identify existing and possibly evolving concerns of Guamanians related to Tourism;
8. Measure progress in meeting the community related goals of the 2020 Tourism plan;
9. Provide policy and strategic recommendations based upon the significant findings of the study.

- The last STAR survey was conducted by GVB in 2010. In conducting the survey in 2017, GVB was interested in tracking changes in attitudes recorded in prior surveys and investigating current issues, concerns and developments within the tourism industry. To accomplish this the project had three elements:
  1. **Qualitative Assessment:** Two focus groups were convened to explore issues important to residents today. The first group was comprised of “cultural stakeholders” to discuss issues about tourism that may be effecting the culture of Guam. The second group was among local private and public stakeholders representing local government and business interests.
  2. **Quantitative Survey:** More than 1,200 local residents inclusive of 600 Chamorros were interviewed over a four week period. Survey quantitatively assessed Issues identified through the focus groups and tracked changes in items of importance to GVB from prior surveys.
  3. **Drivers Analysis:** The quantitative survey provided the means to identify what is most important in shaping the attitudes of residents regarding tourism. A two stage regression analysis was conducted and key drivers of local attitudes were identified.

- Current Guam residential phone numbers were randomly selected and 1,257 interviews were successfully completed utilizing a Computer Aided Telephone Interviewing system. The survey was conducted over a 4 week period in April and May, 2017 by the MR&D calling center located in Saipan.
- For a sample of this size, the results are accurate to within **±2.5%** at the 95% confidence level. That is to say if the survey were replicated 100 times, the probability is that, 95 times out of 100, the same results with the same level of accuracy would be obtained.

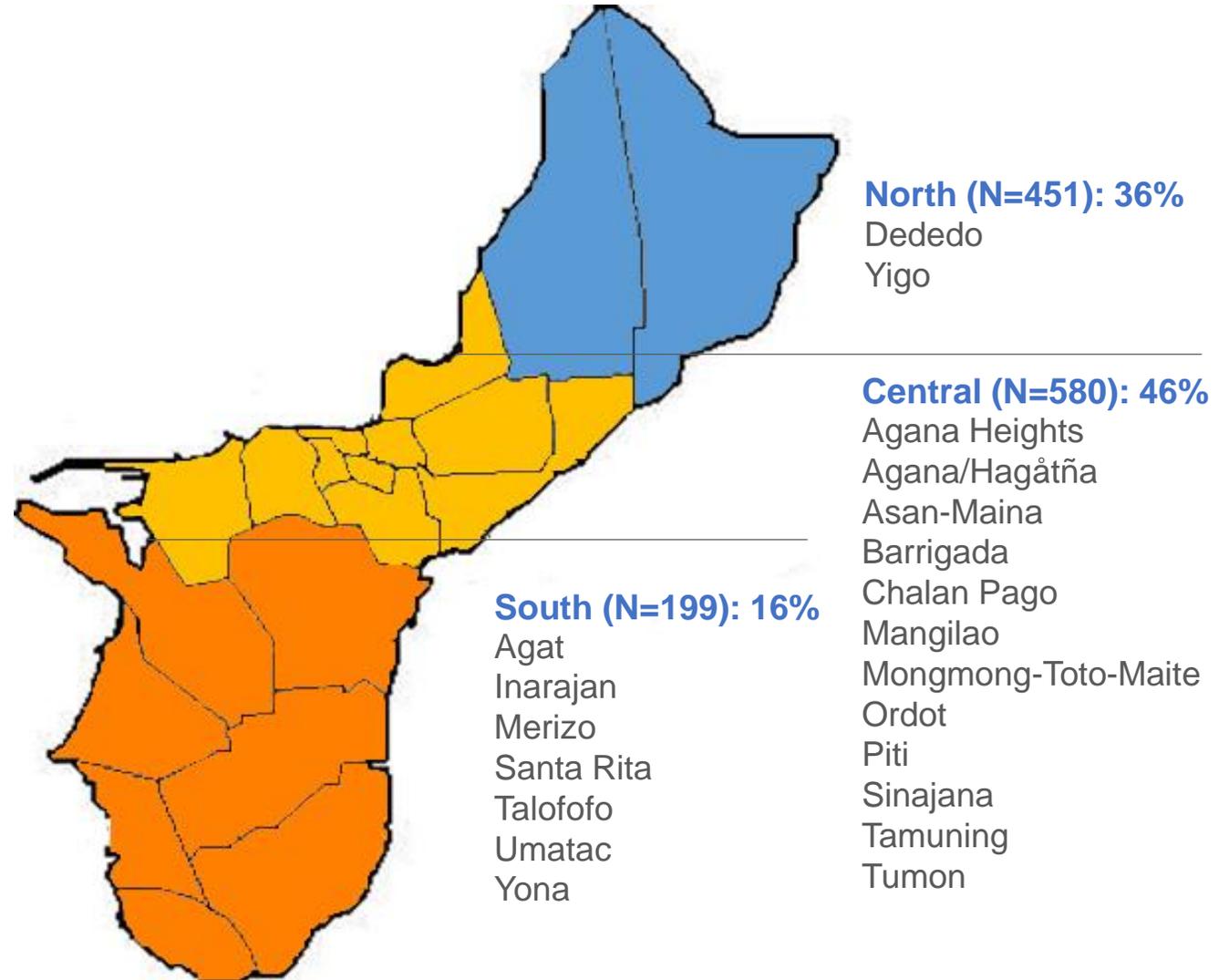
# Sample Construction

- GVB required that at least 600 Chamorros be included in the final sample. Some 651 Chamorros were interviewed.

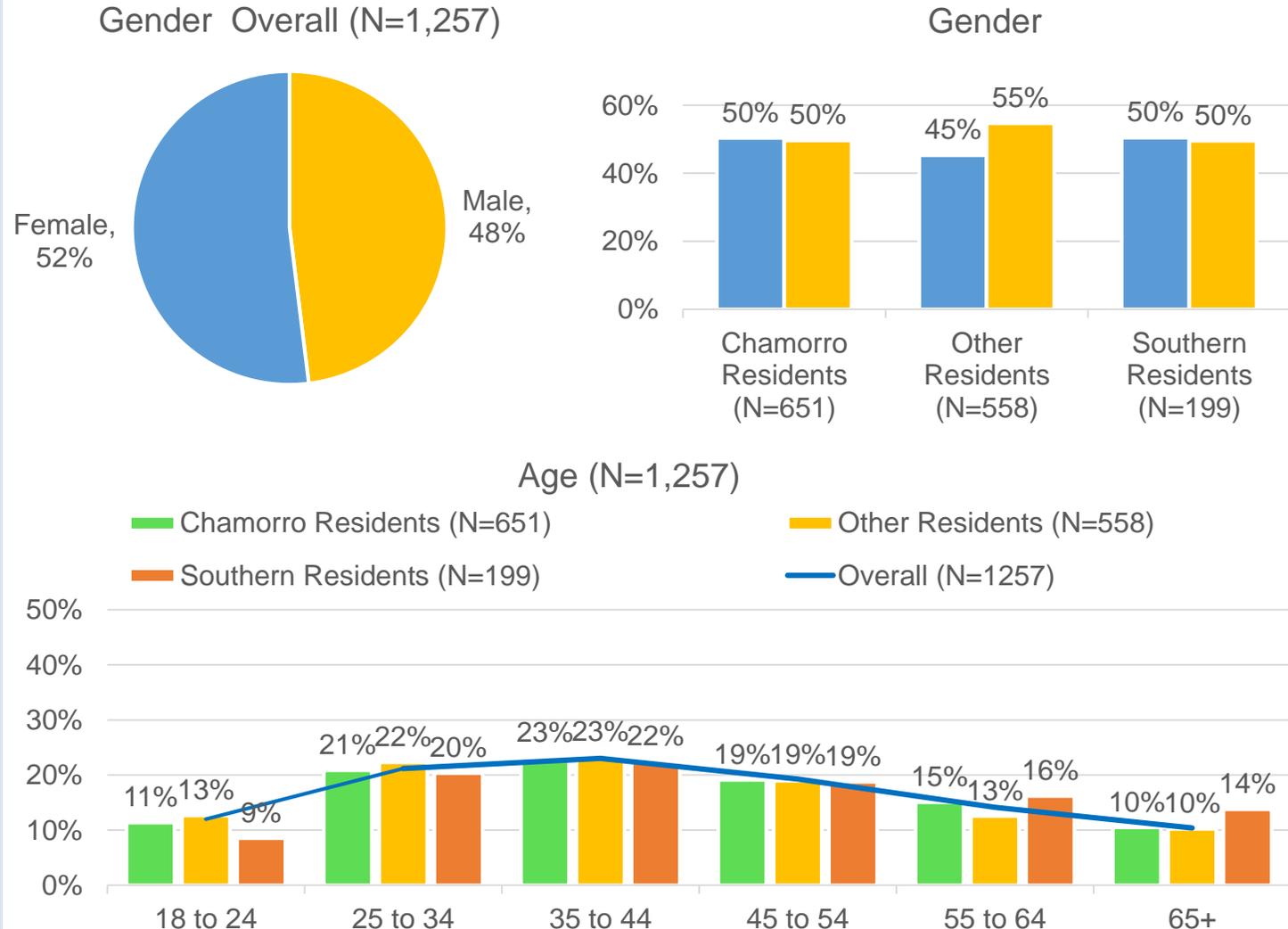


# Sample Construction

- To ensure that the sample was reflective of the age of Guamanians as reported by the U.S. census in 2010, the age variable was weighted.
- Data collected from the North, Central, and Southern regions of Guam reflected distributions found in the 2010 U.S. census.

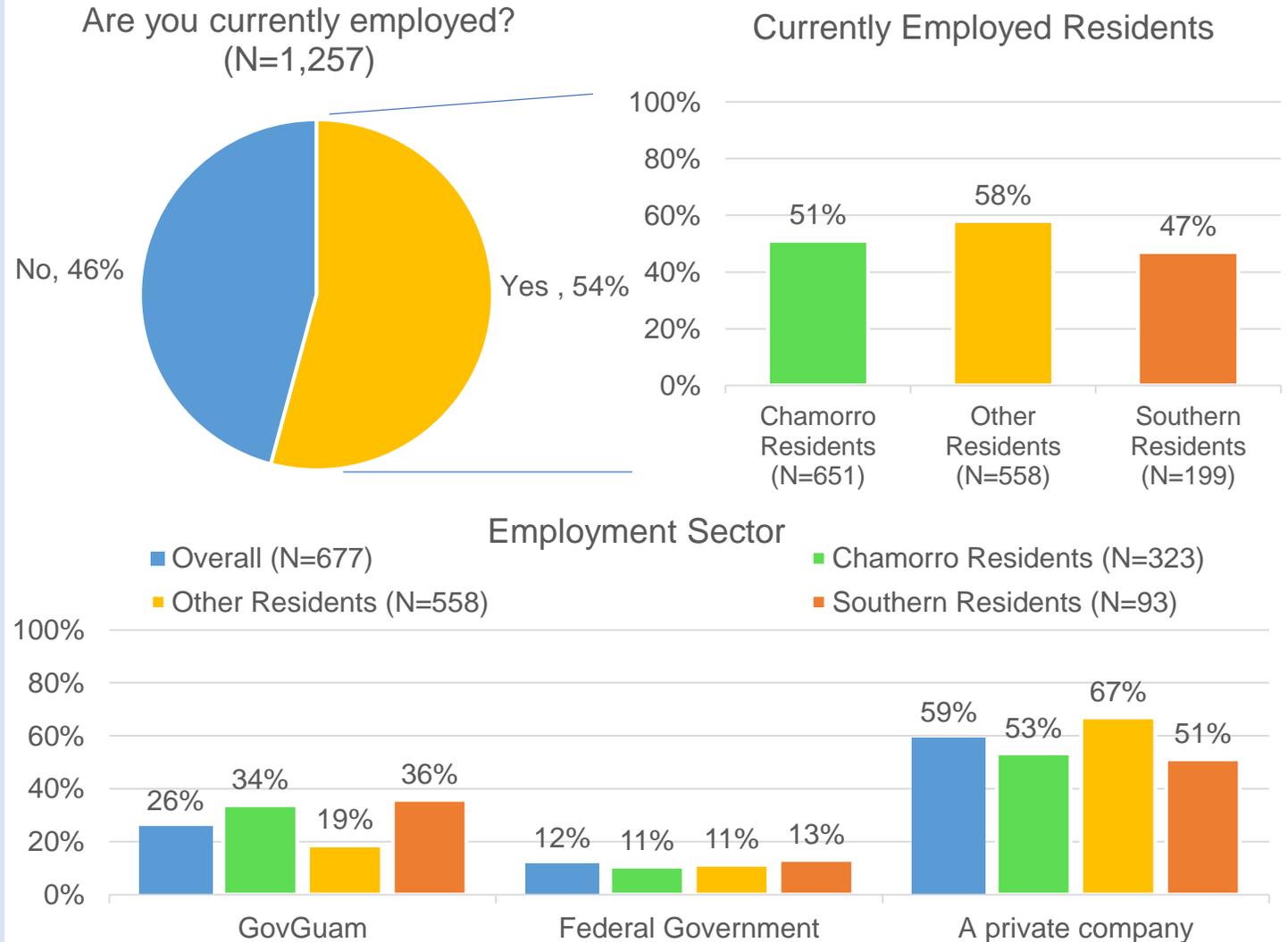


- The distribution of gender reflected the 2010 census, with 54% of respondents being female, and 48% being male.
- Due to the nature of Computer-Assisted Telephone Interviewing (CATI), there is a tendency to have higher numbers of older respondents. This was true for this sample. To more accurately represent the population on Guam, the age variable was weighted to reflect the latest U.S. census.



# Demographics

- Over half of respondents were employed (54%).
- Of those employed, over half were employed in the private sector (59%).

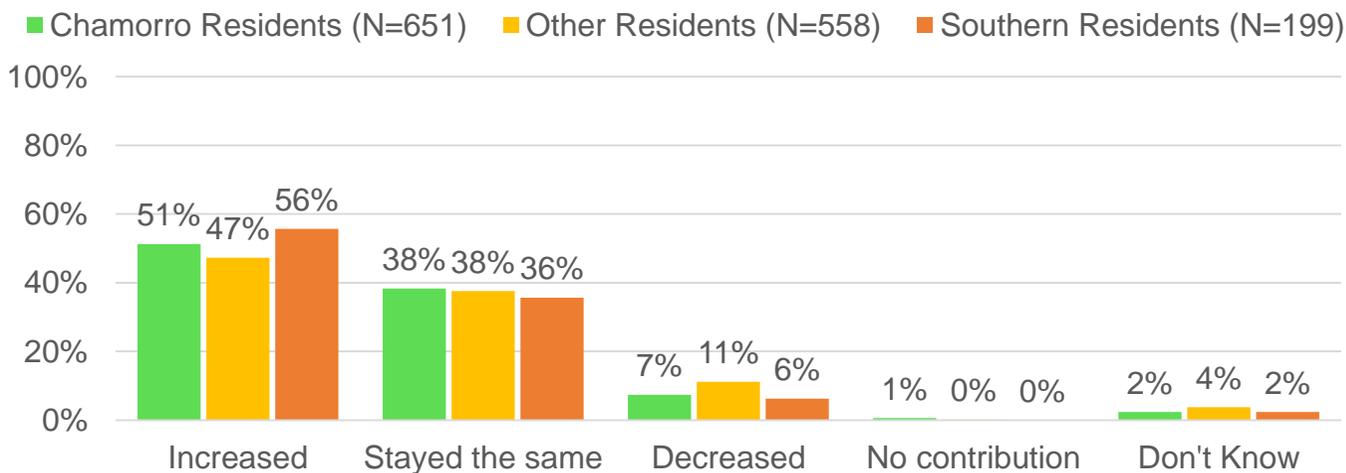
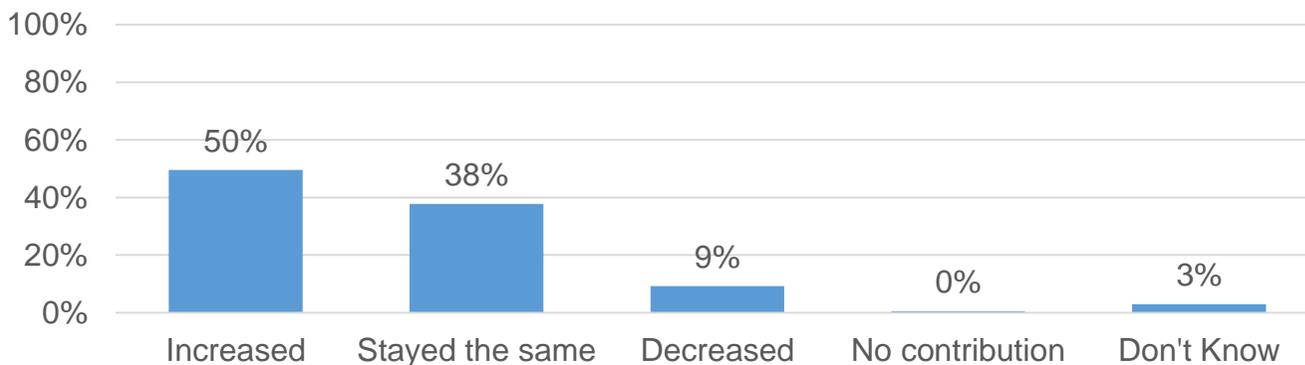




# Economic and Tourism Indicators

- Respondents felt that tourism's contribution on the local economy has increased (50%) or stayed the same (38%) over the last two years. The results show a generally positive perception of tourism's contribution to the economy. (88%).

Over the last two years, do you think tourism's contribution on the local economy has... (N=1,257)

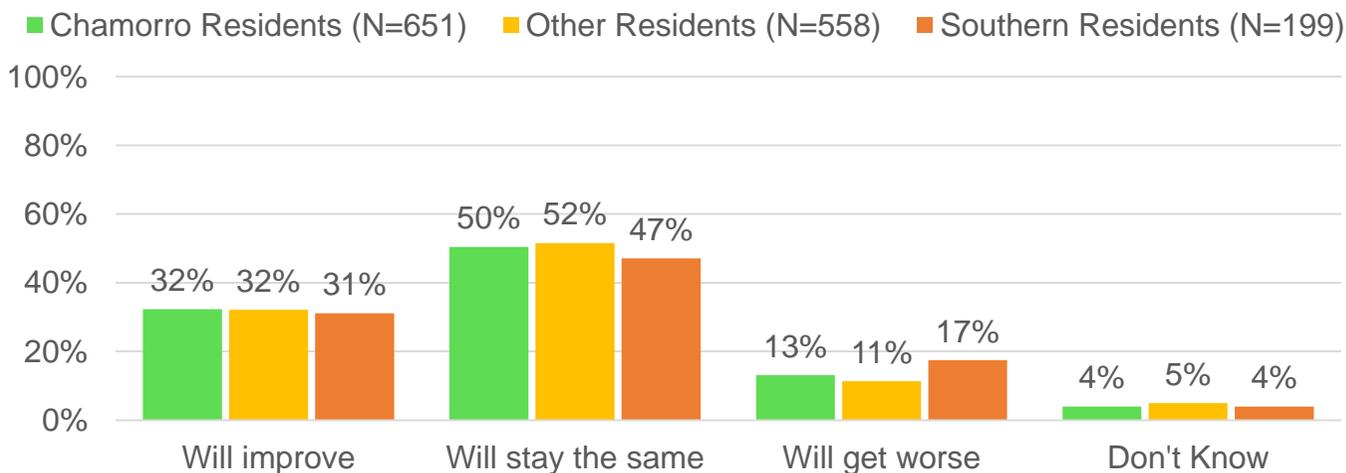
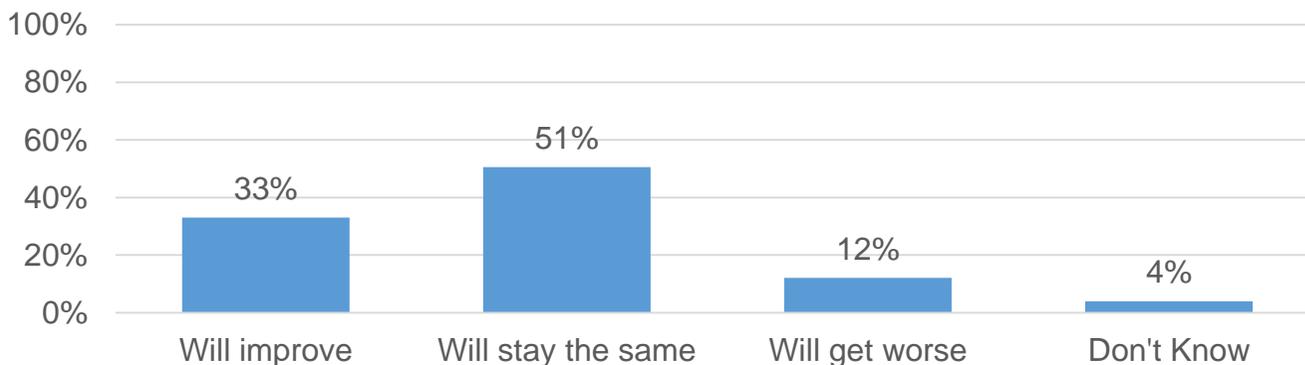


**Focus Group Comments:**

*"In the F&B industry alone, seeing it flourish at this time, relative to tourism, it's great to see a mix in all of the stores and in Tumon in general."*

- Residents also have a generally positive outlook for the growth of Guam's economy over the next twelve months, with 84% agreeing that it will either improve (33%) or stay the same (51%).

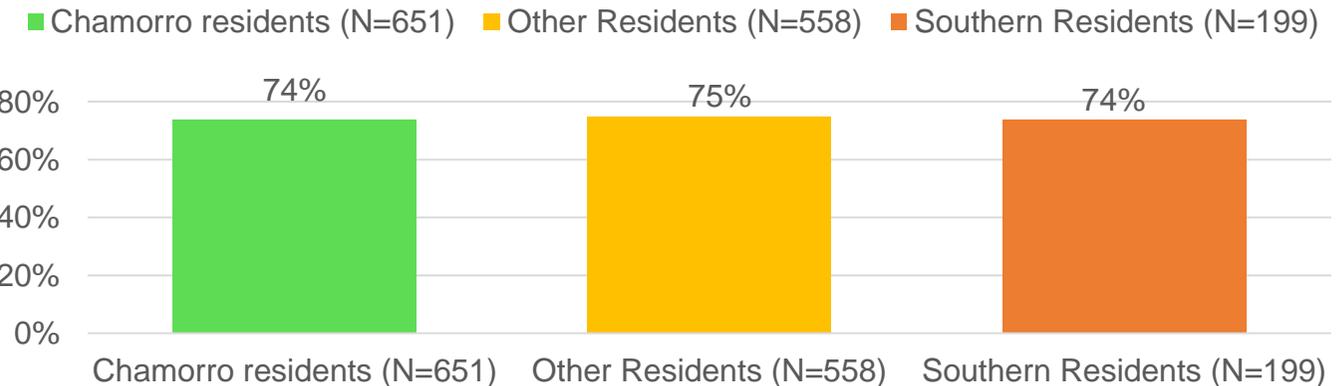
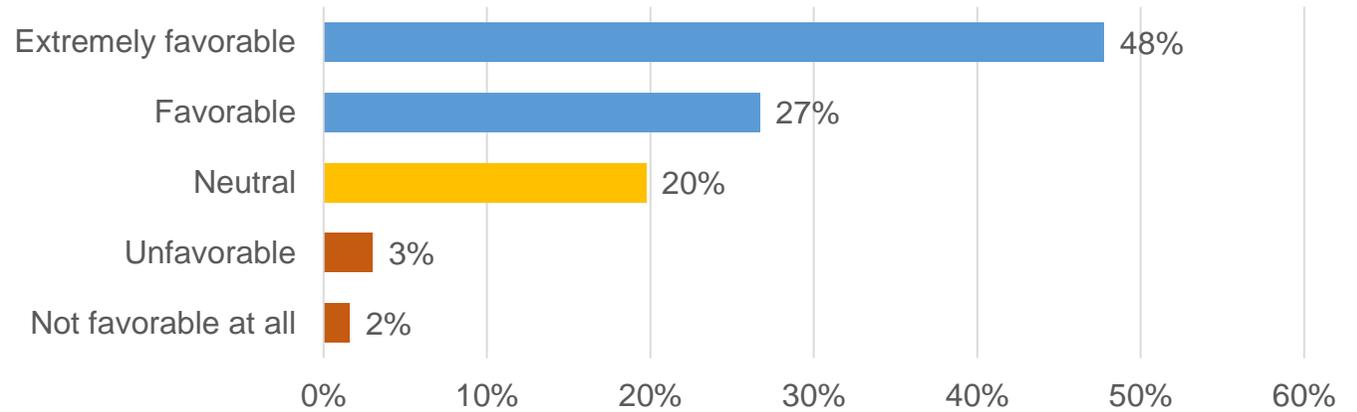
And over the next twelve months, do you feel Guam's economy is going to improve, get worse, or stay the same? (N=1,257)



# Favorability Towards Tourism

- Seventy-five percent (75%) of respondents indicated either an extremely favorable (48%) or favorable (27%) opinion of Tourism on Guam.

On a scale of 1 to 5, where 1 means “extremely unfavorable” and 5 means “extremely favorable”, please give me your opinion of tourism as an industry in Guam. (N=1,257)

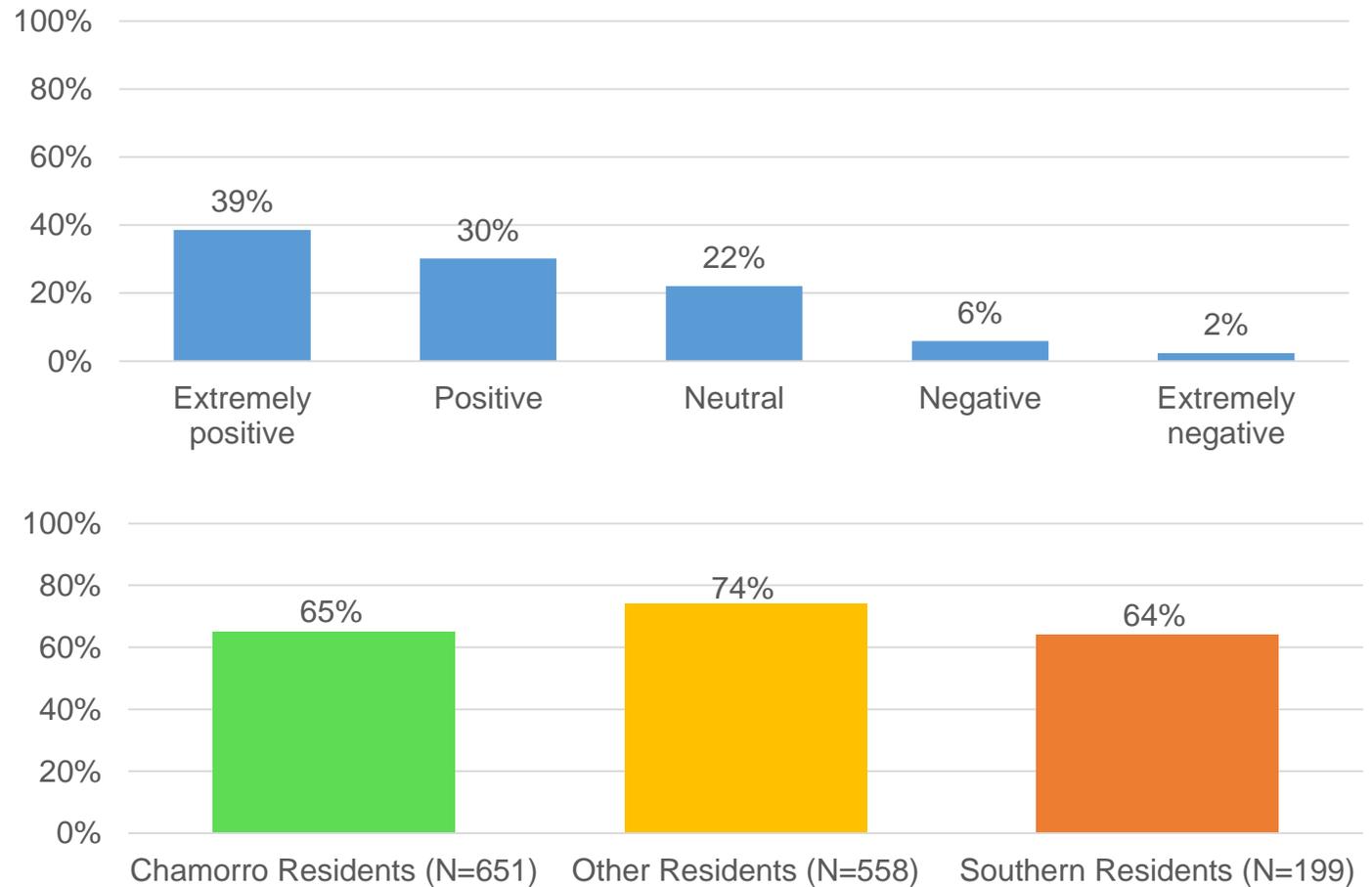


*Focus Group Comments:*  
“[Tourism is the] bread and butter of Guam”

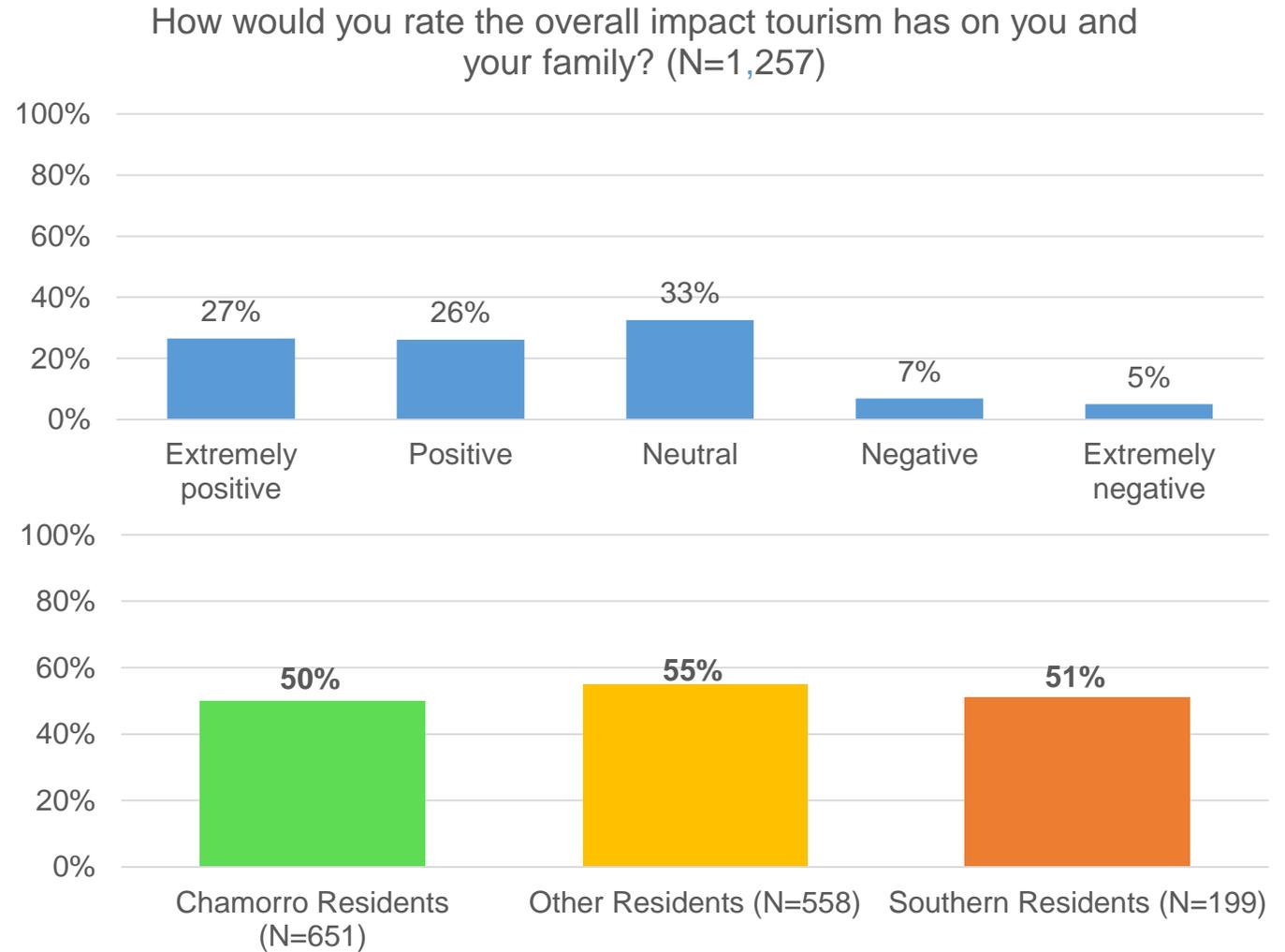
# Tourism's Impact on Guam Overall

- When asked about tourism's impact on Guam overall, over two-thirds (69%) perceived the impact as either "extremely positive" (39%) or "positive" (30%).
- Other residents (non-Chamorro residents) were most likely to have a positive perception of tourism's impact on Guam overall, significantly higher than both Chamorro residents (65%) and Southern residents (64%).

How would you rate the overall impact tourism has on Guam overall? (N=1,257)



- When asked about tourism's impact on the individual and family, over half (53%) perceived it as "extremely positive" (27%) or "positive" (26%)
- There was only a slight variation between Chamorro residents (50%) and Other residents (55%) on their extremely positive/positive ratings of the impact of tourism on the individual and the family.

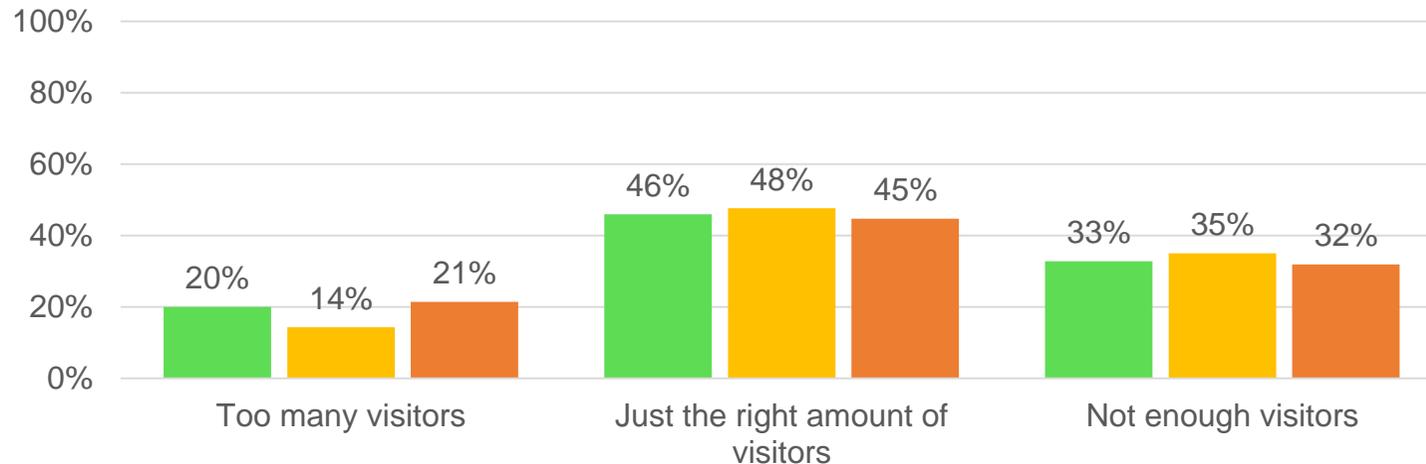
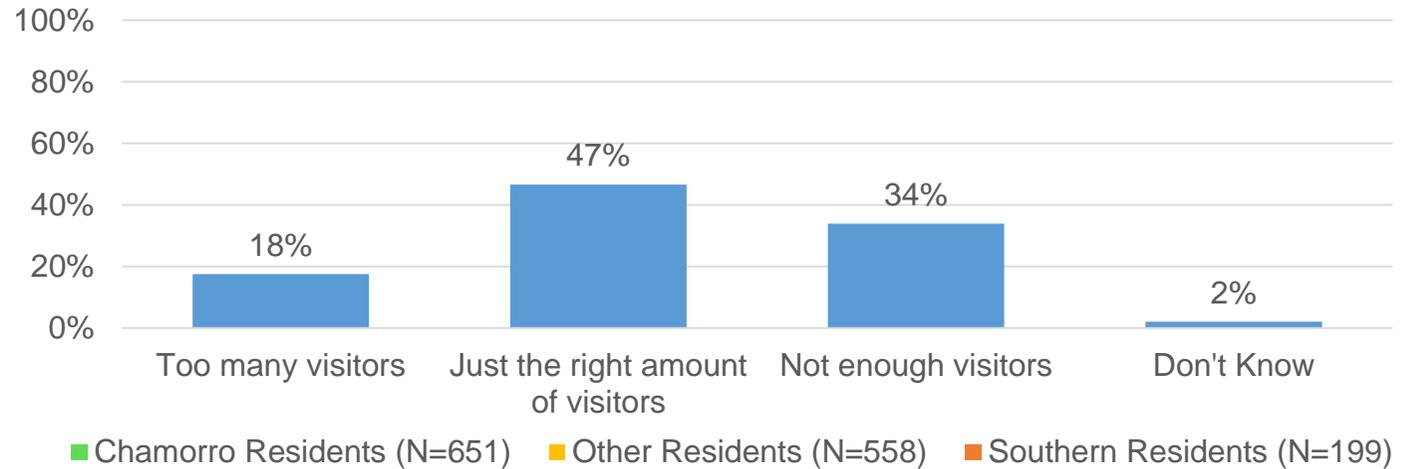


- Forty-seven percent (47%) of all residents feel that there are just the right amount of visitors, while thirty-four percent (34%) feel that there are not enough visitors.
- Chamorros and southern residents are significantly more likely to indicate there are too many visitors than other residents.

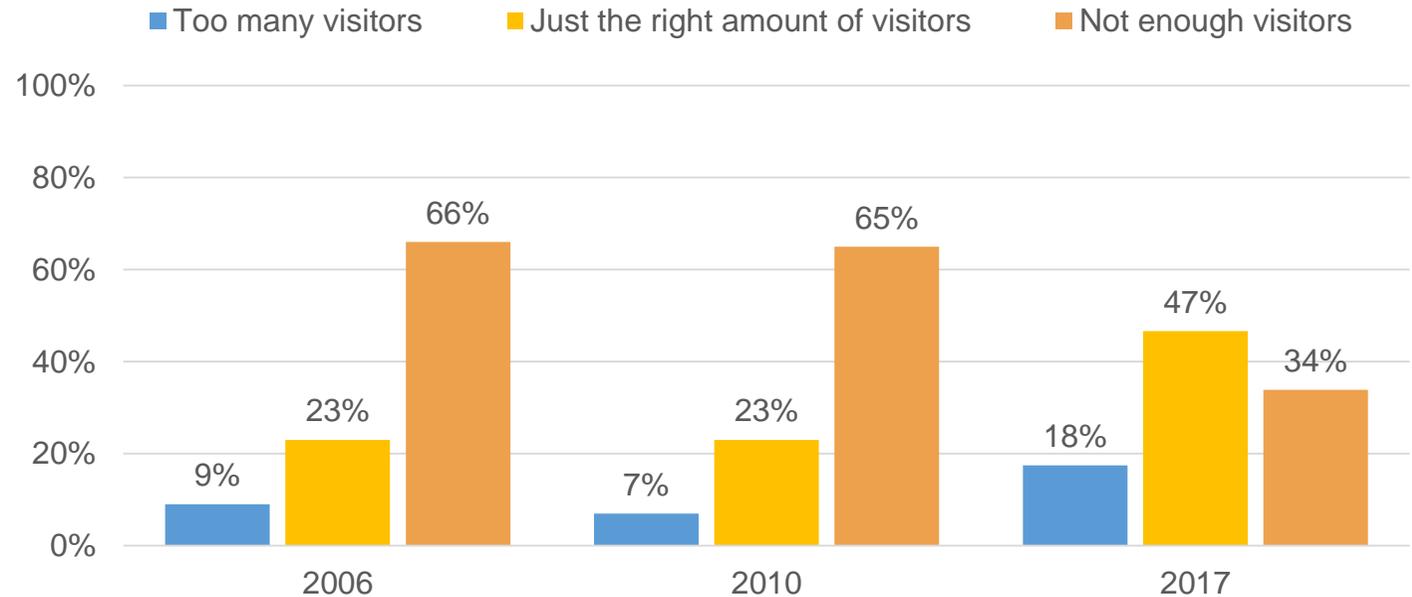
**Focus Group Comments:**

- *“I’ve questioned quantity over quality.”*
- *“The government needs to build the infrastructure so we can keep up with the number of tourists.”*

How do you feel about the number of visitors coming to Guam each year? Do you feel that there are... (N=1,257)



- The proportion of residents who perceived that just the right amount of visitors come to Guam each year more than doubled from 23% in both 2010 and 2006 to 47%.
- Previous years' surveys showed a substantially larger percentage of residents who perceived that not enough visitors are coming to Guam each year with 65% in 2010 and 66% in 2006. The proportion of residents in 2017 who perceive that Guam is not receiving enough visitors decreased to 34%.



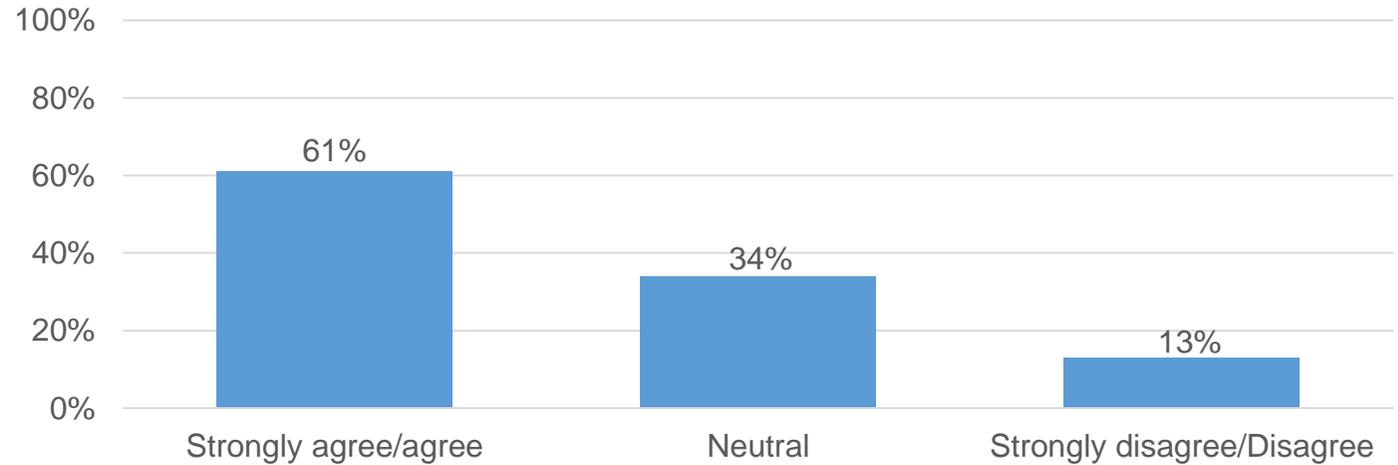
- Majority of residents view tourism favorably as an industry on Guam.
- Residents also have a positive outlook for the growth of Guam's economy.
- This year's survey indicated a greater tendency than in previous years to state that Guam has too many visitors.
- The extent to which residents are concerned about sustainability issues may be related to these results.

- Residents generally feel positive in response to the statement “tourism creates many well-paying jobs for residents”, with 61% responding with agree (27%) and strongly agree (34%).

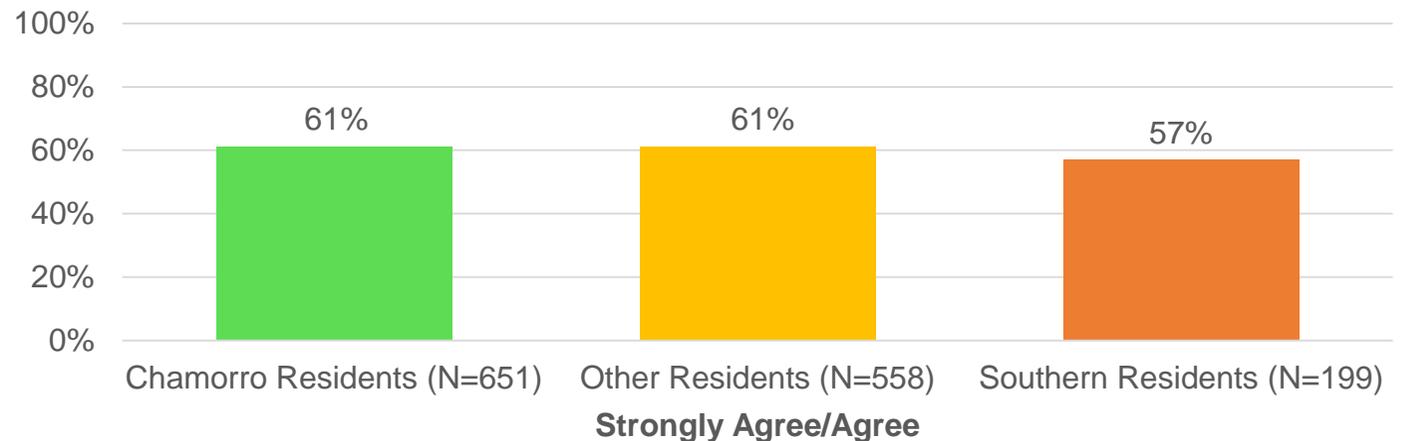
Focus Group Comments:

- “We’re consistently hiring... I do know that there is a lot of people that we are employing throughout the island and Saipan.”
- “I think [tourism is] the largest sector of jobs in the island.”

Tourism creates many well-paying jobs for residents (N=1,257)

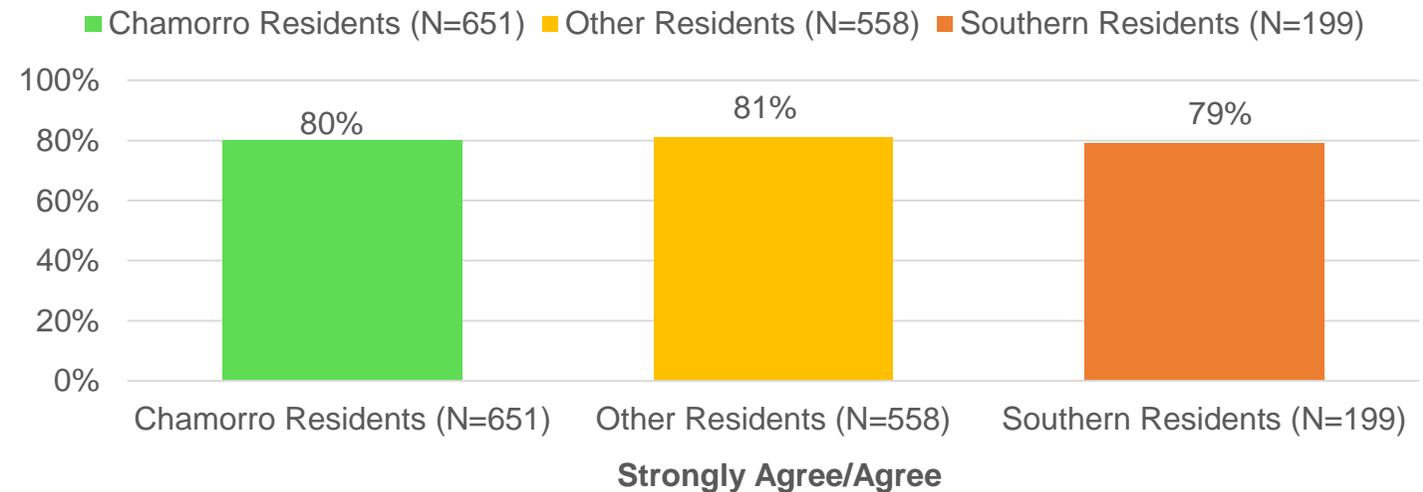
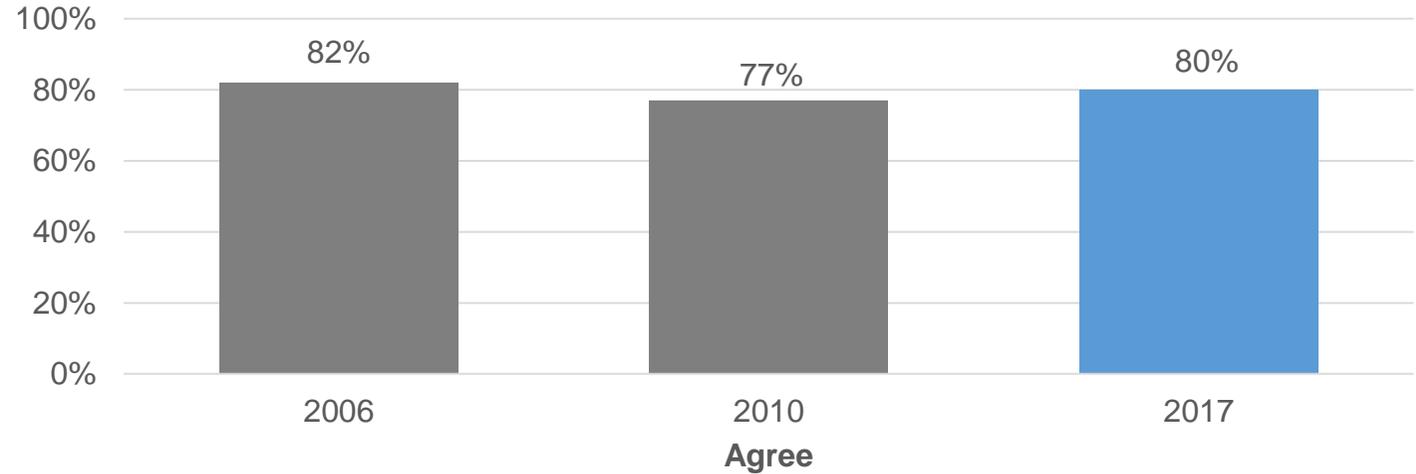


■ Chamorro Residents (N=651) ■ Other Residents (N=558) ■ Southern Residents (N=199)

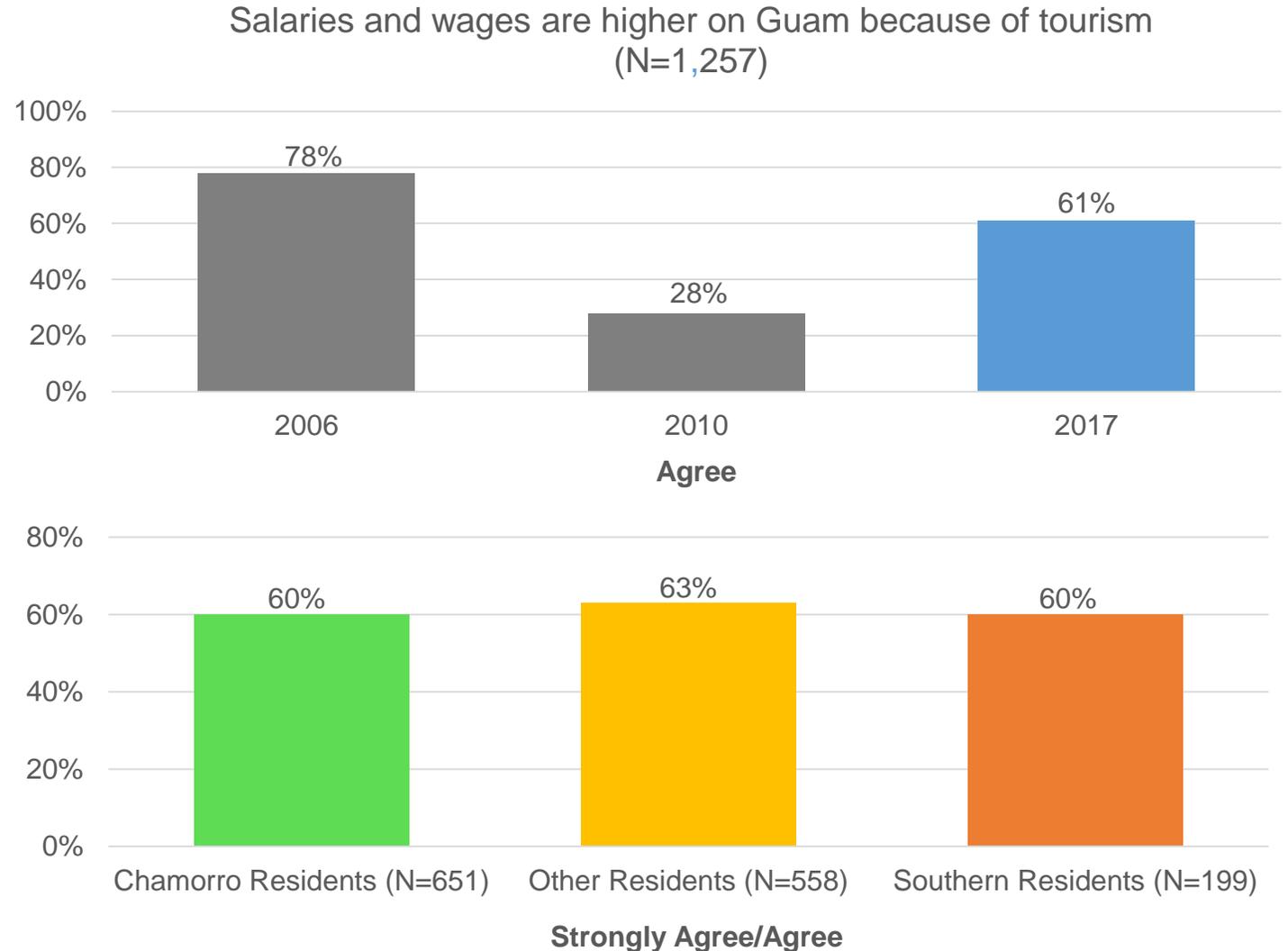


- Similar to the previous survey periods, residents agree that the standard of living on Guam would be much less than it currently is without tourism (80%).

Without tourism, the standard of living on Guam would be much less than it currently is. (N=1,257)

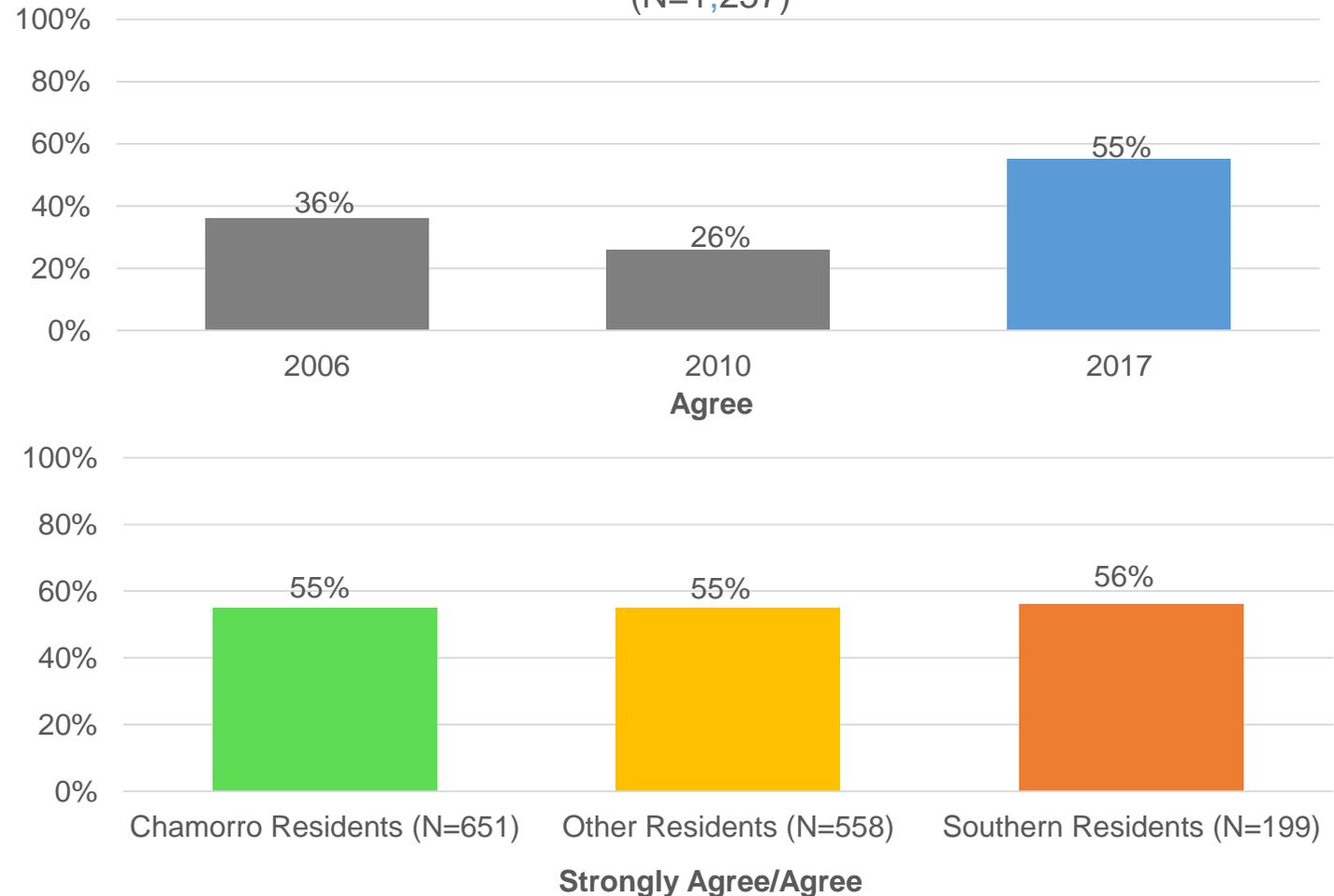


- The proportion of residents who perceive that salaries and wages are higher on Guam because of tourism increased to 61% from 28% in 2010, but still lower than the 78% in 2006.

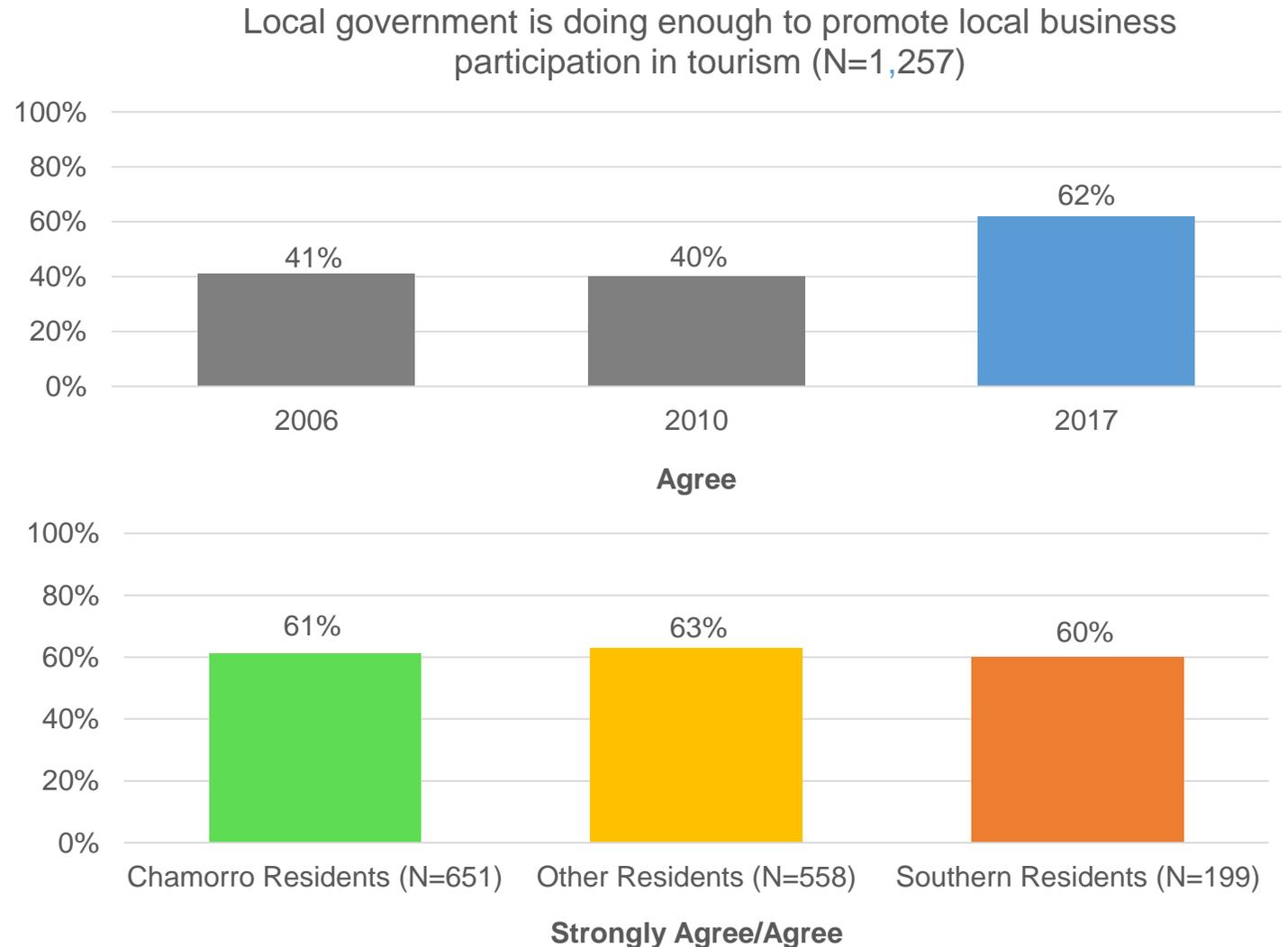


- Over half (55%) of residents perceived local stores on Guam (or “Mom and Pop” stores) are getting their fair share of the business created by tourism. This figure has more than doubled since the last survey period (26%).

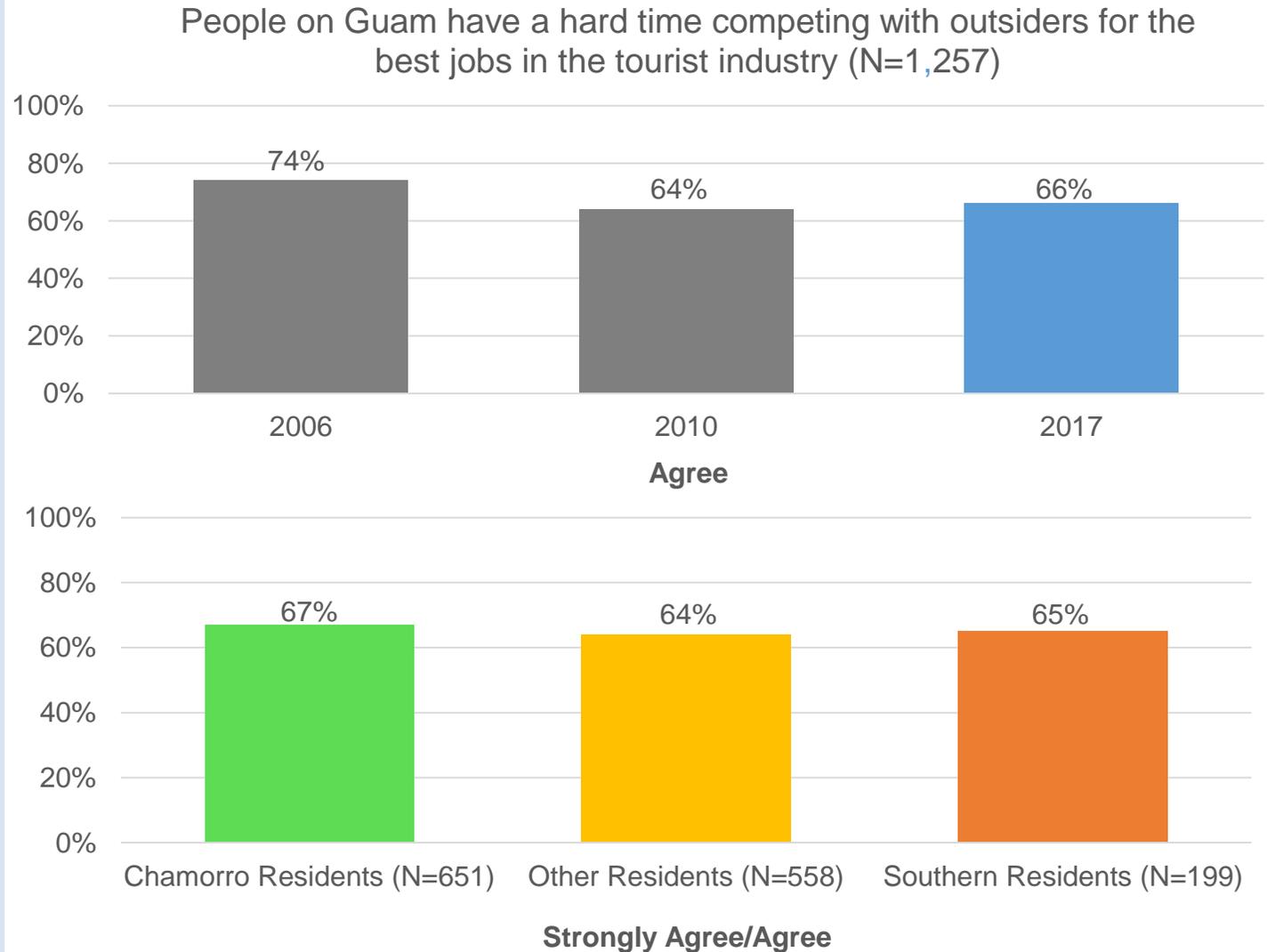
Local stores, or what we sometimes call “Mom and Pop” stores, are getting their fair share of the business created by tourism. (N=1,257)



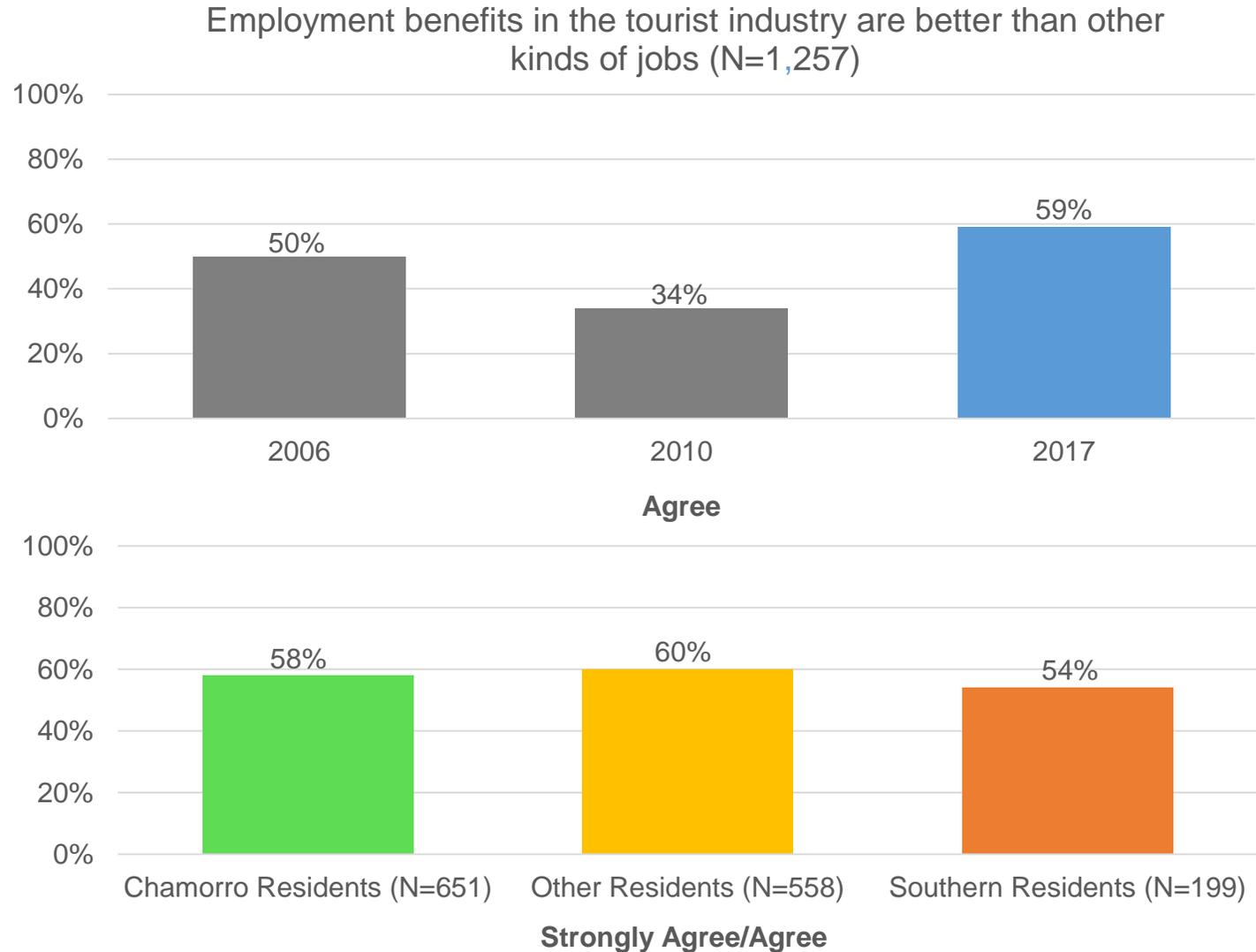
- Sixty-two percent (62%) of residents agree that local government is doing enough to promote local business participation in tourism. This is a significant increase from the previous survey (40%).



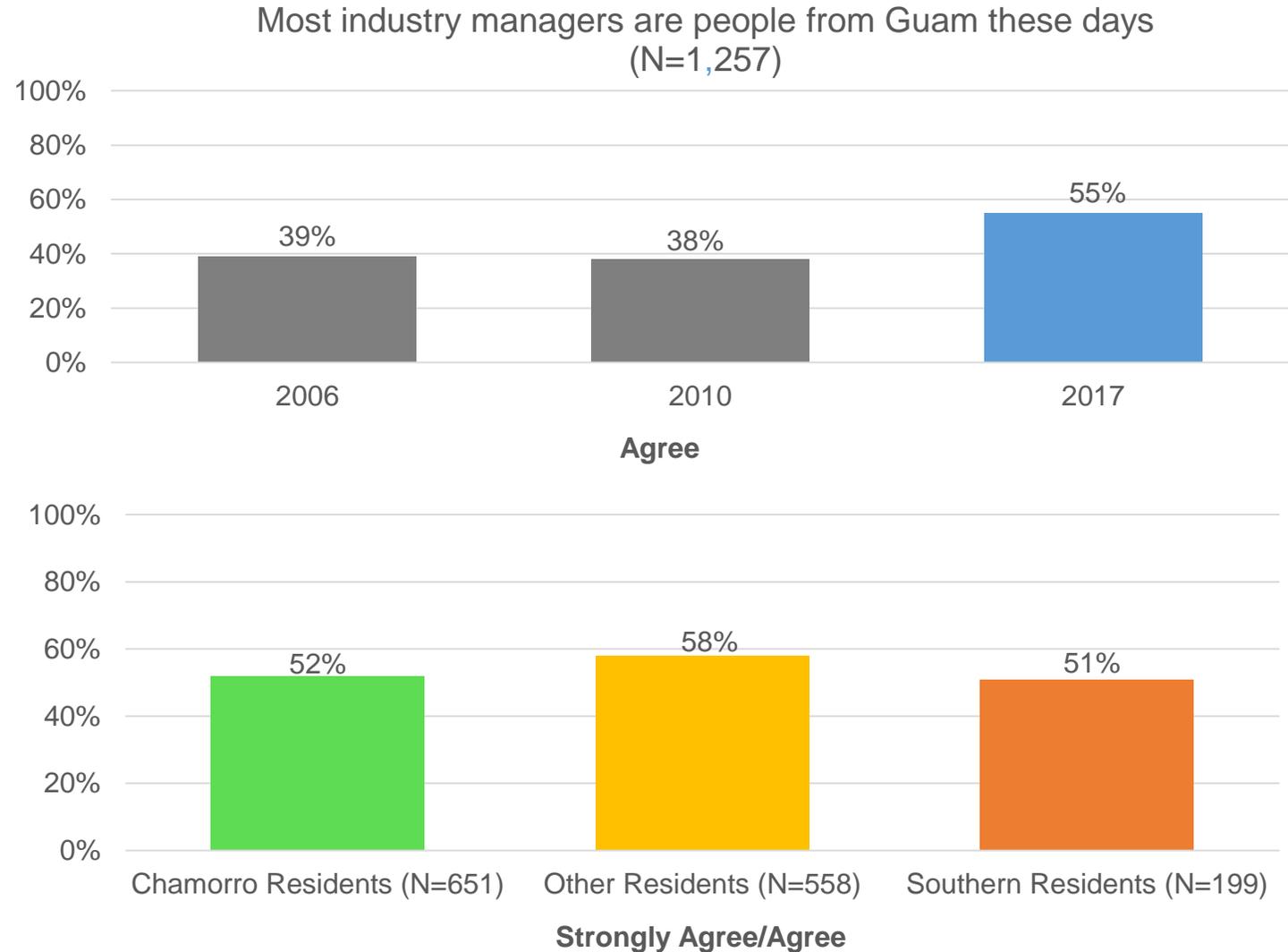
- Over the last ten years, there has been a significant decrease in the proportion of residents agreeing that people on Guam have a hard time competing with outsiders for the best jobs in the tourism industry.
- In 2006, (74%) believed that local residents had difficulty competing, compared to (64%) in 2010 and (66%) In 2017.



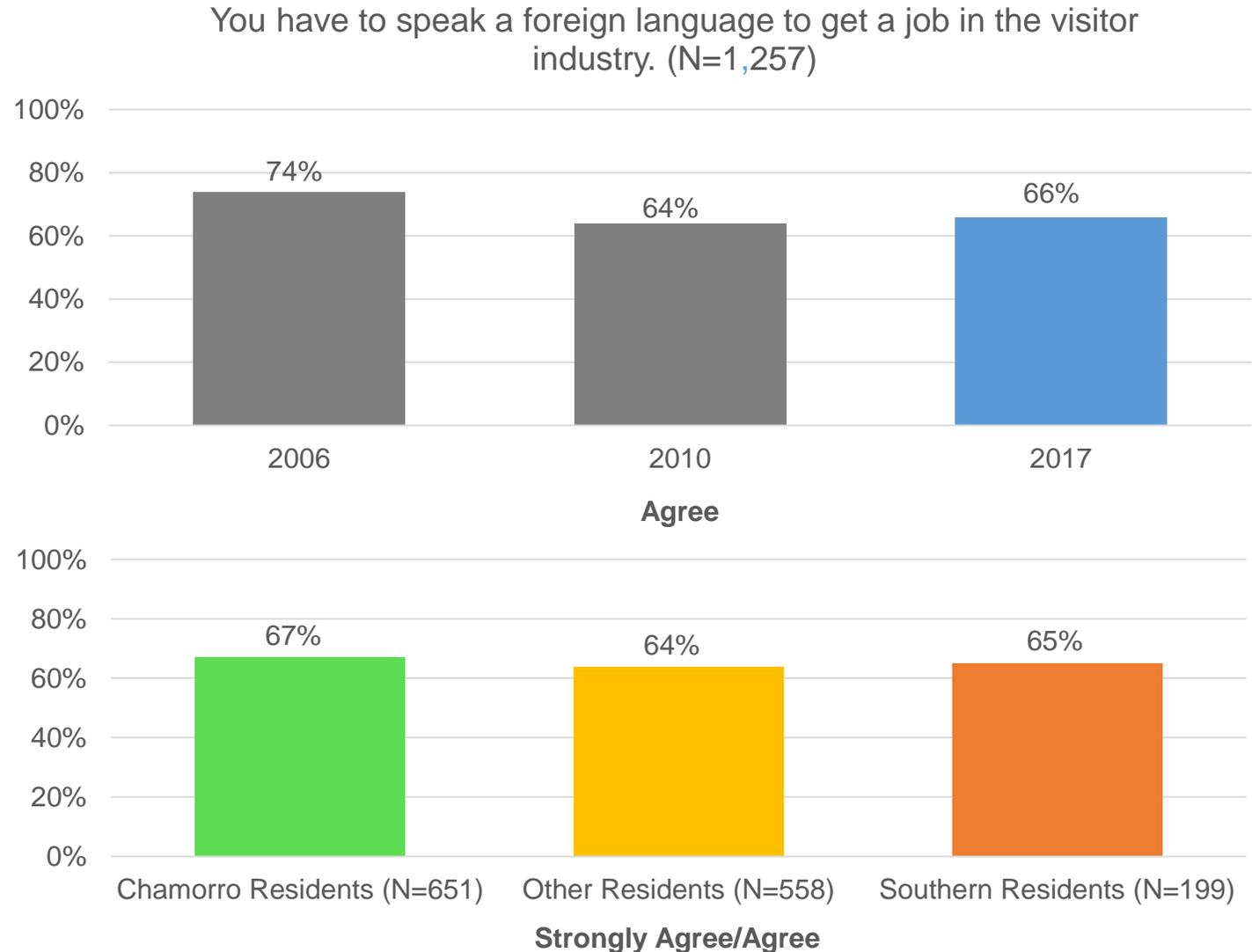
- The proportion of residents agreeing to the statement “Employment benefits in the tourism industry are better than other kinds of jobs” increased to (59%) from (34%) in 2010 and (50%) in 2006.



- Agreement with the statement “Most industry managers are people from Guam these days” increased to over half of respondents for the first time in a decade with (55%) in 2017, compared with (38%) in 2010, and (39%) in 2006.

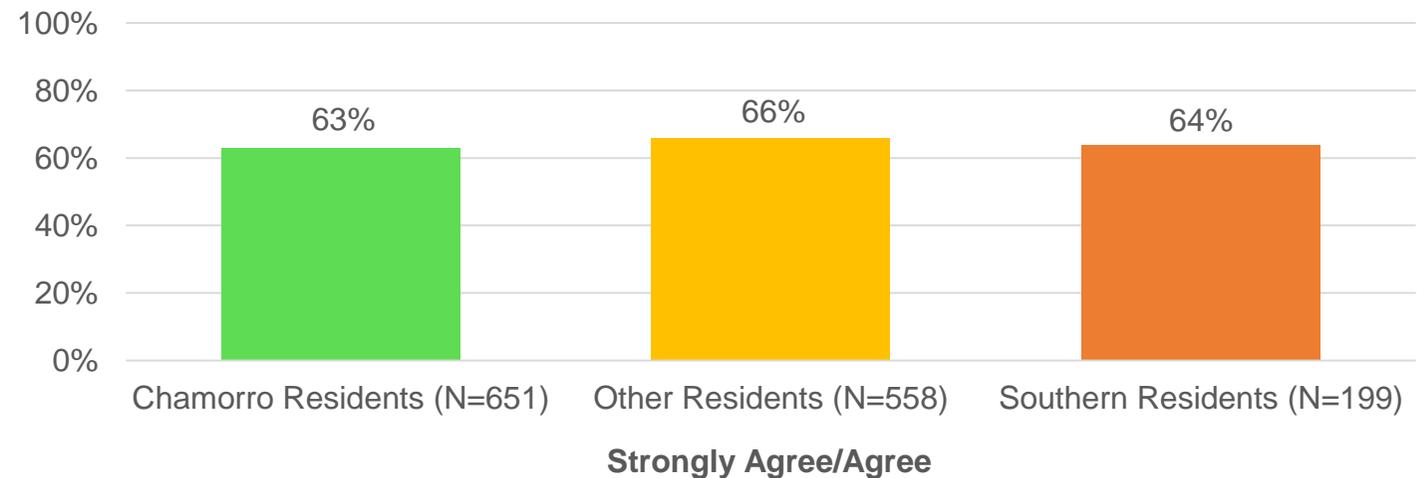
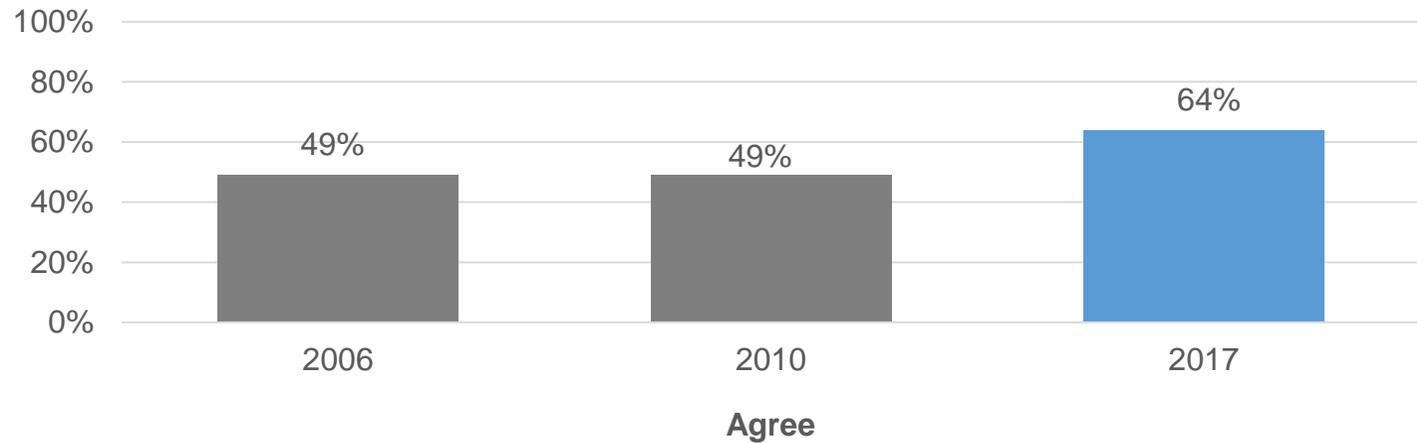


- Agreement with the statement “You have to speak a foreign language to get a job in the visitor industry” did not significantly increase in 2017 from 2010, but decreased from (74%) in 2006.



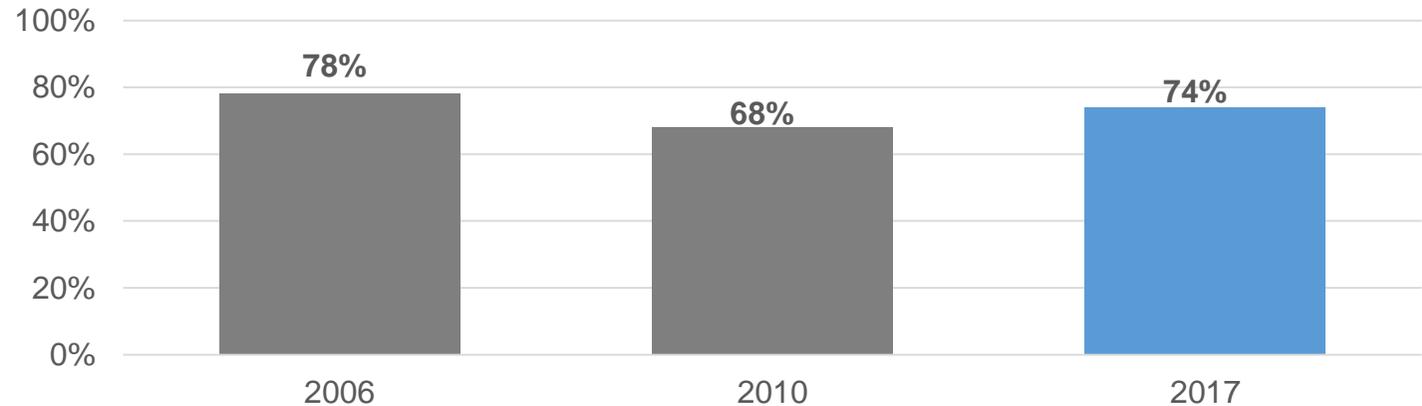
- The statement “Most tourism jobs don’t offer much chance for advancement” had (64%) in agreement in 2017 compared to (49%) in both 2010 and 2006. No significant variances exist between the surveyed ethnicities and Southern region.

Most tourism jobs don’t offer much chance for advancement.  
(N=1,257)

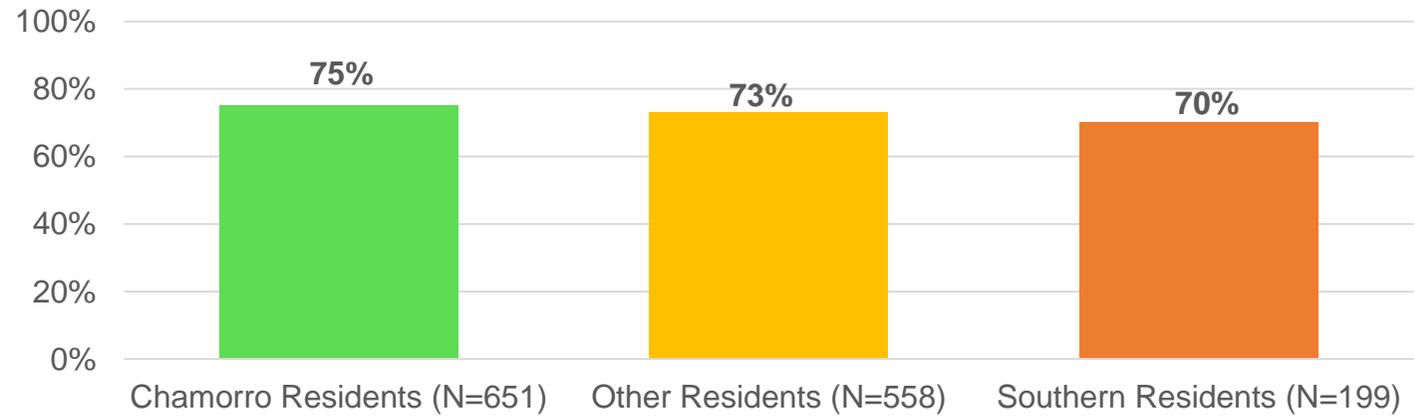


- The proportion of respondents agreeing to the statement “People wanting to be tourist industry managers can get good training these days” has not changed significantly in the past ten years.

People wanting to be tourist industry managers can get good training on Guam. (N=1,257)



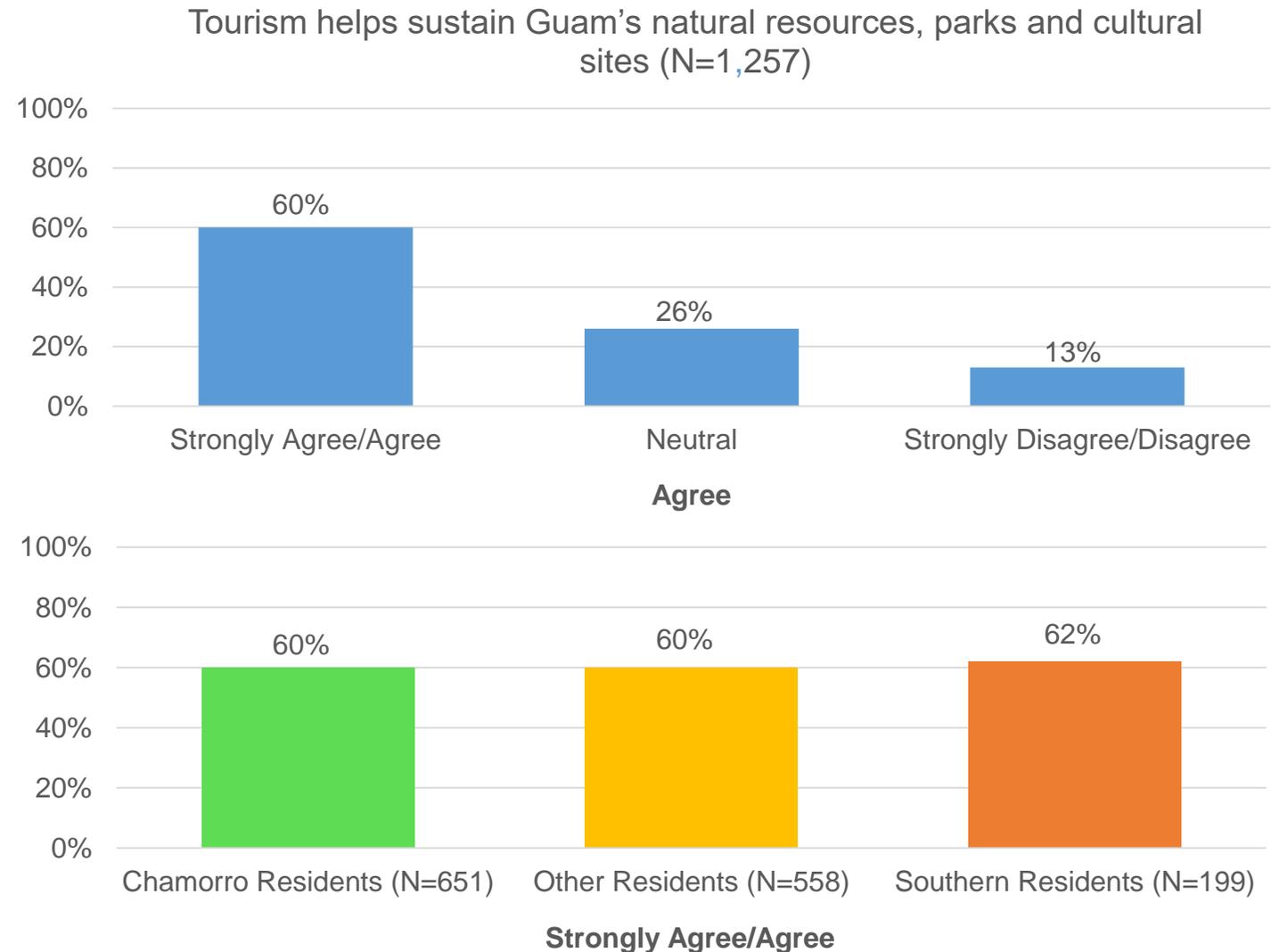
Agree



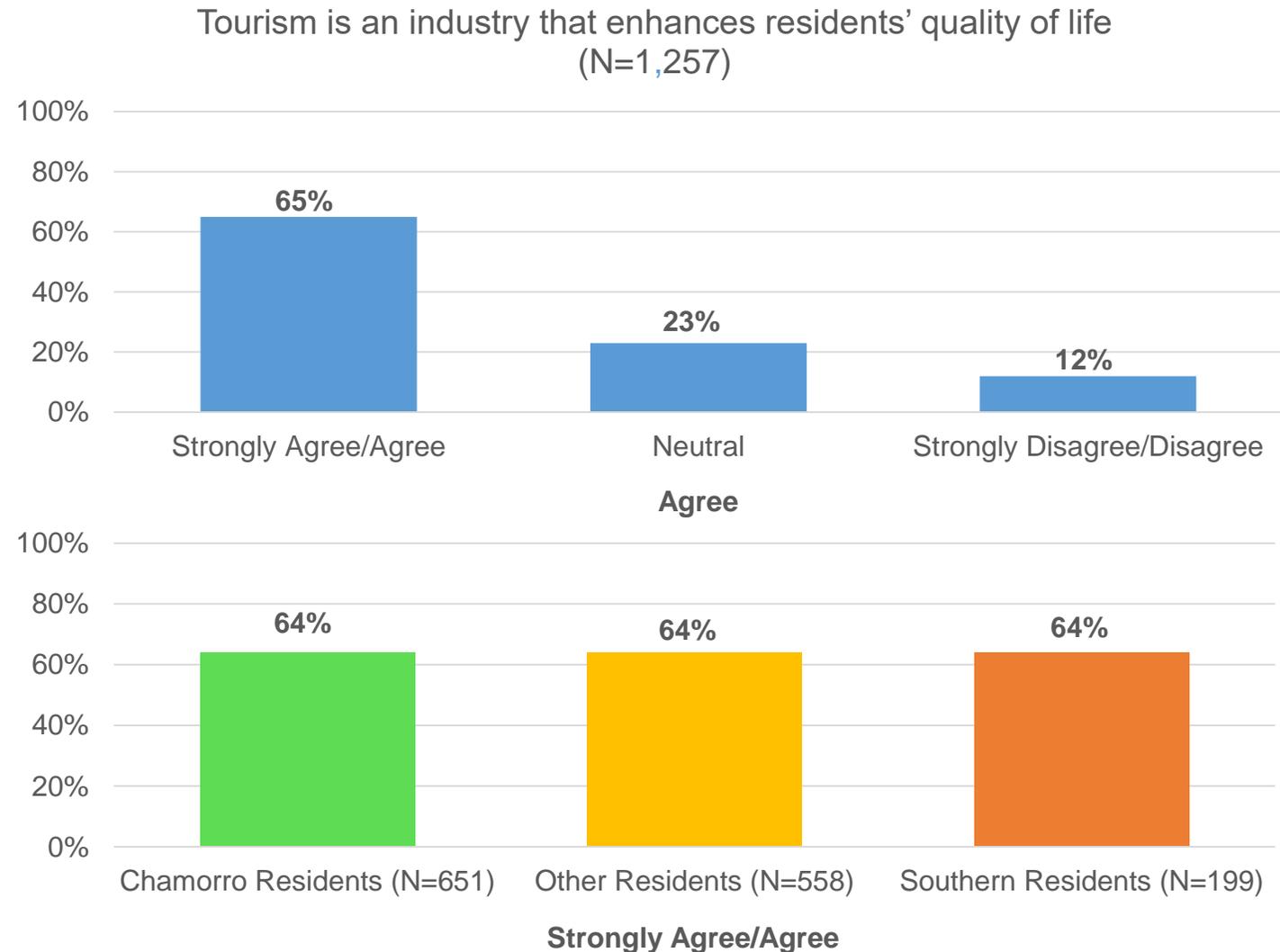
Strongly Agree/Agree

- Most residents agree that tourism creates many well-paying jobs.
- As the Drivers Analysis will show later, there is a strong relationship between employment related issues and residents' feelings of favorability toward tourism.
- Although there is a marked increase in residents agreeing that most industry managers are from Guam these days, there is an increase in the perception that most tourism jobs “don't offer much chance for advancement.”

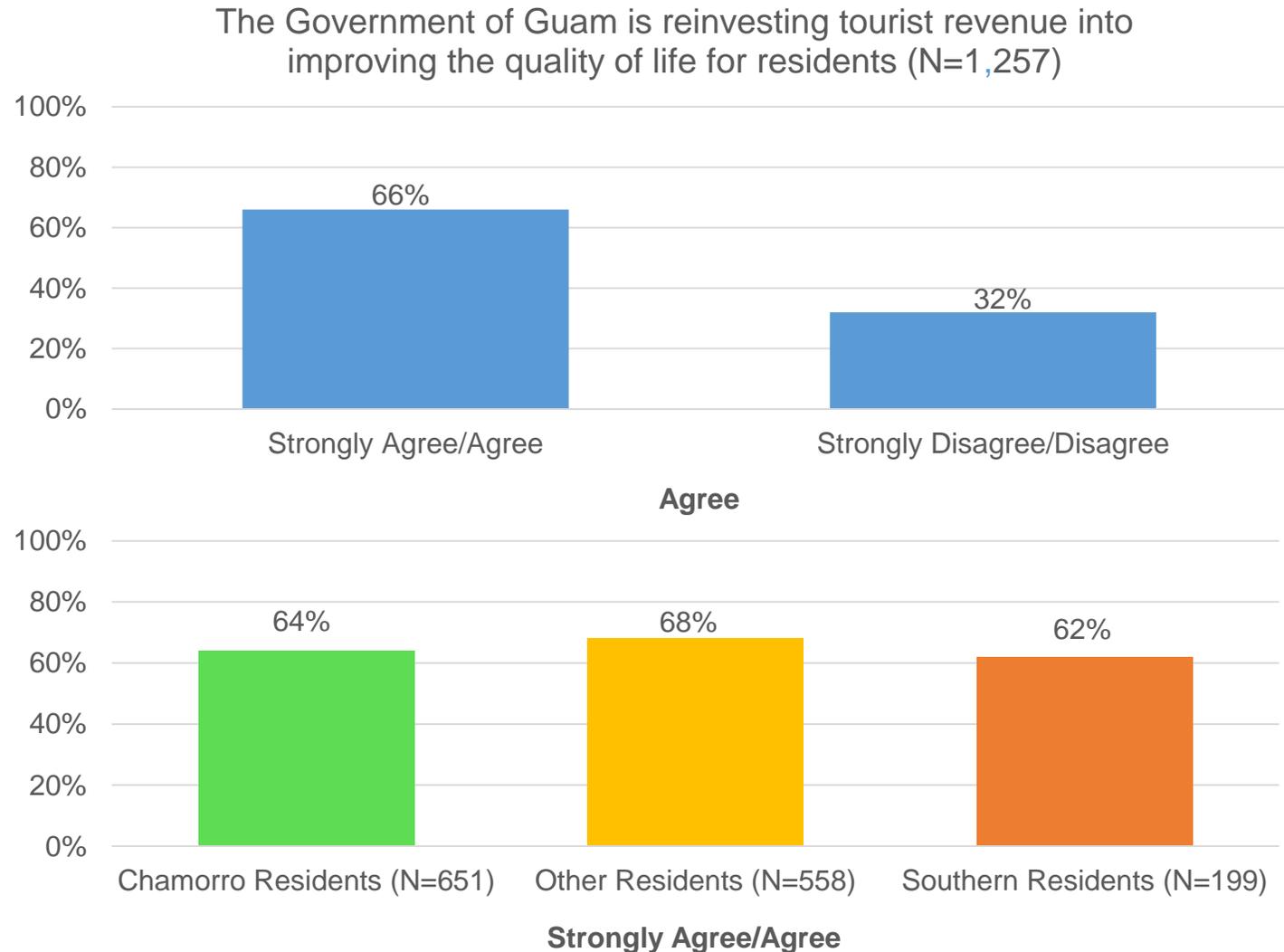
- Residents feel positive in response to the statement “Tourism helps sustain Guam’s natural resources, parks and cultural sites”, with (60%) agreed with this statement.



- Other positive Social/Cultural/Environmental Indicators include the perception that tourism is an industry that enhances residents' quality of life with 65% in agreement.



- When asked about how the Government of Guam is reinvesting tourist revenue into improving the quality of life, residents indicated positive perceptions, with 66% either strongly agreed/agreed.

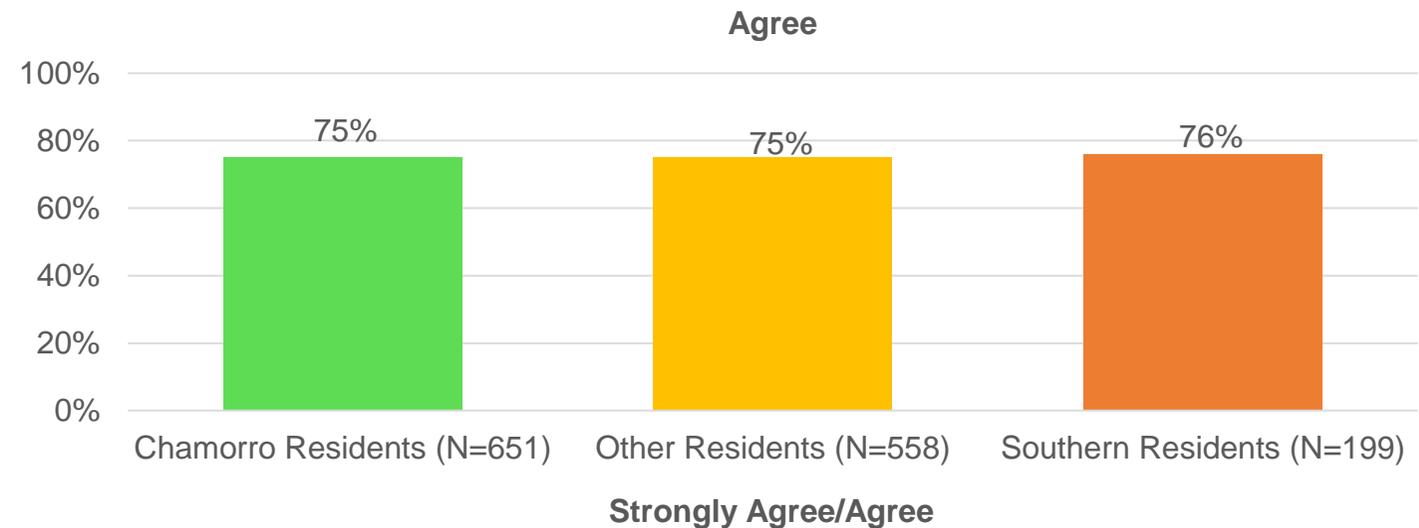
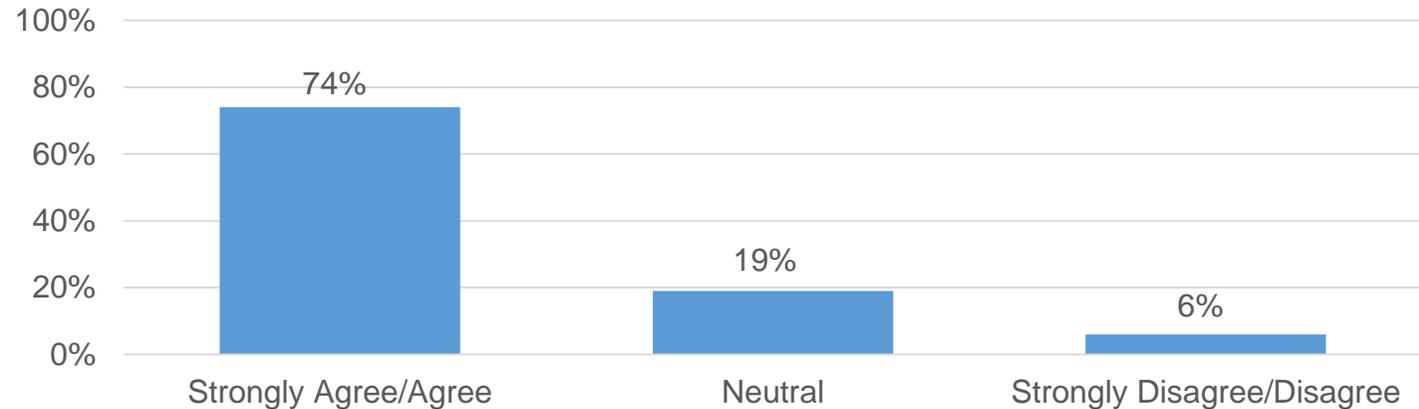


- Three-quarters (74%) of residents indicated that tourism creates shopping, restaurants and entertainment opportunities.

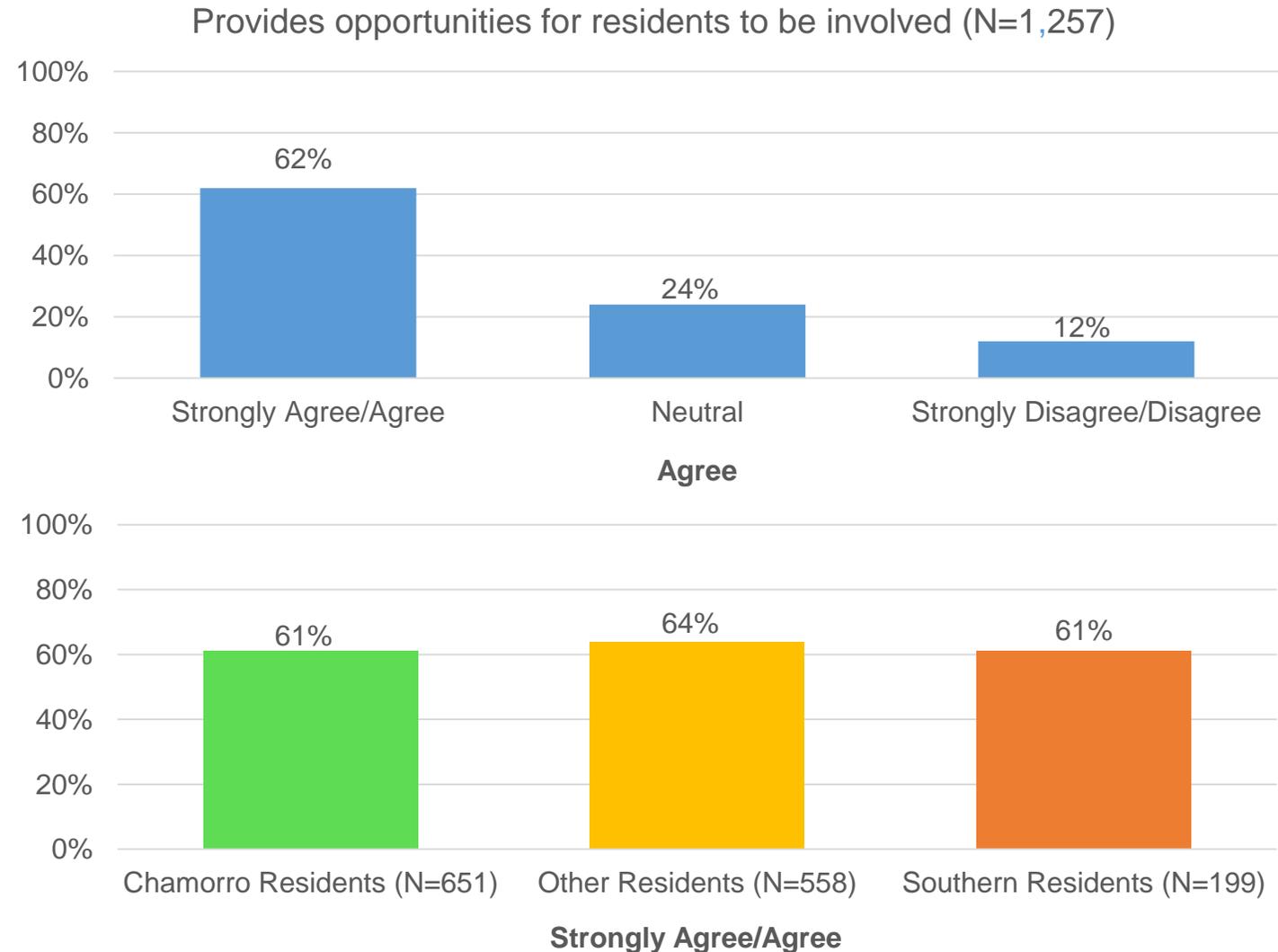
Focus Group Comments:

*“In the F&B industry alone, seeing it flourish at this time, relative to tourism, it’s great to see a mix in all of the stores and in Tumon in general.”*

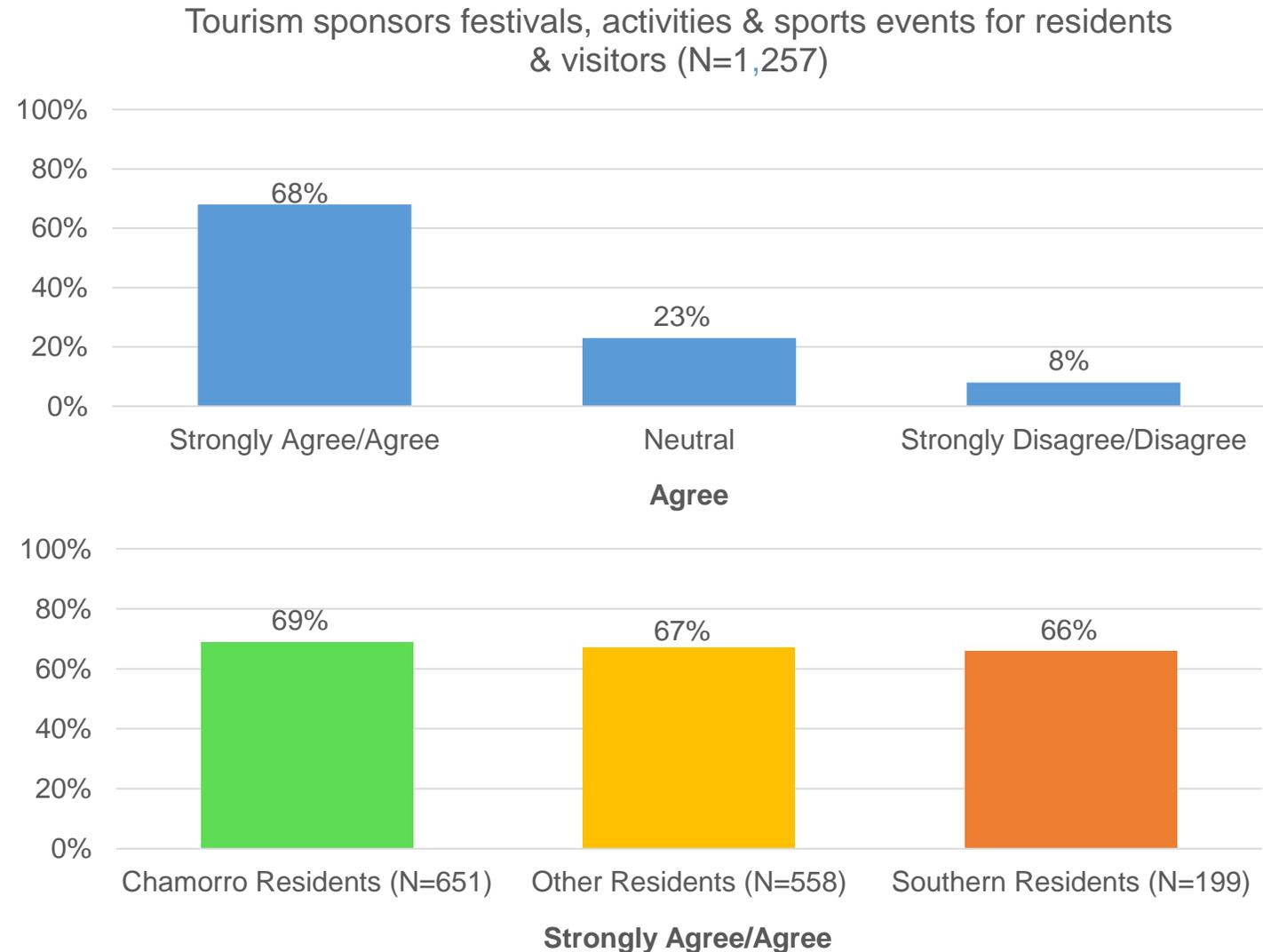
Tourism creates shopping, restaurants and entertainment opportunities for residents (N=1,257)



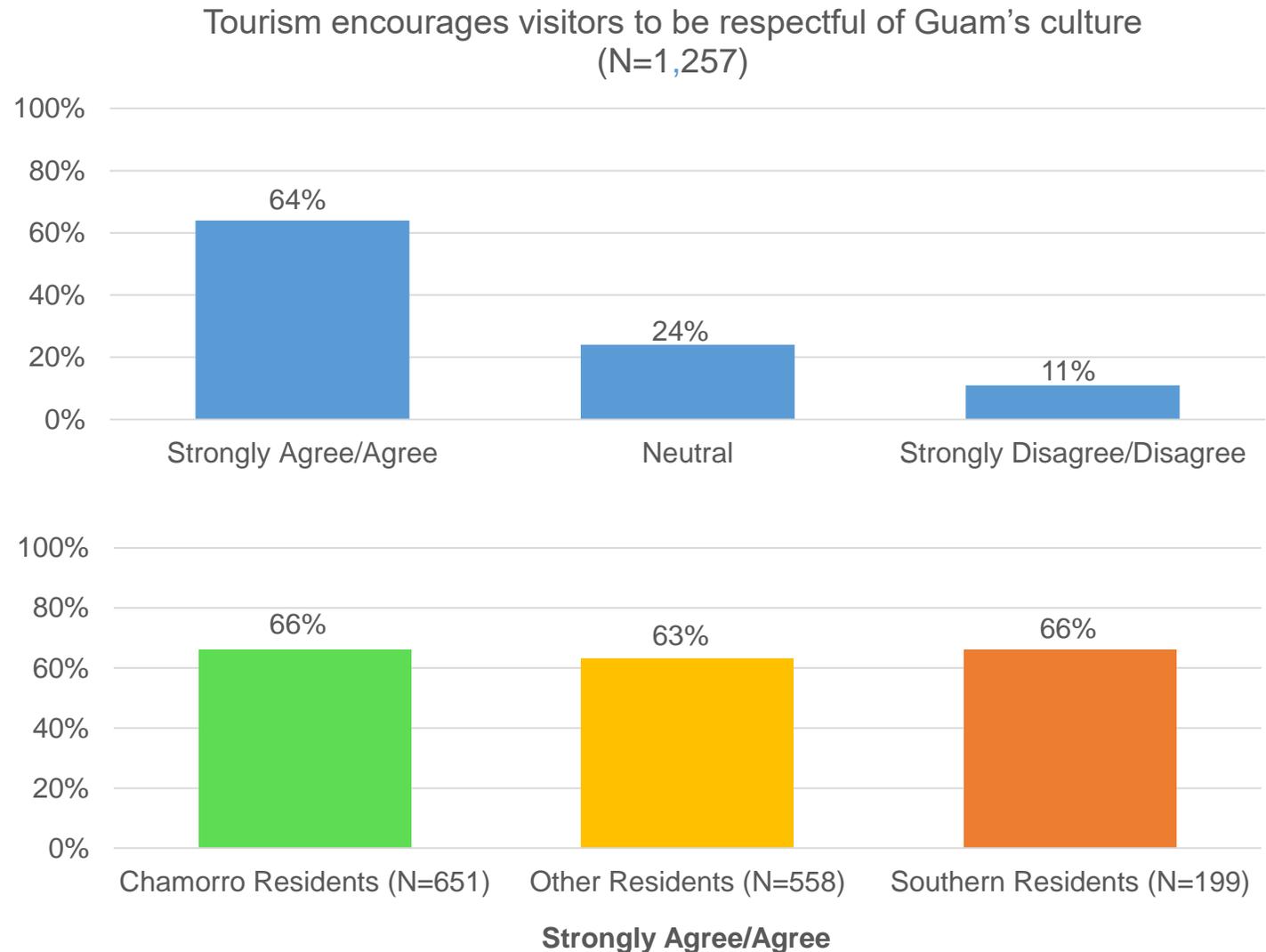
- Six in ten residents (62%) indicated strongly agreed/agreed that tourism provides opportunities for residents to be involved.



- Most residents either strongly agreed or agreed (68%) that tourism sponsors festivals, activities, and sports events.

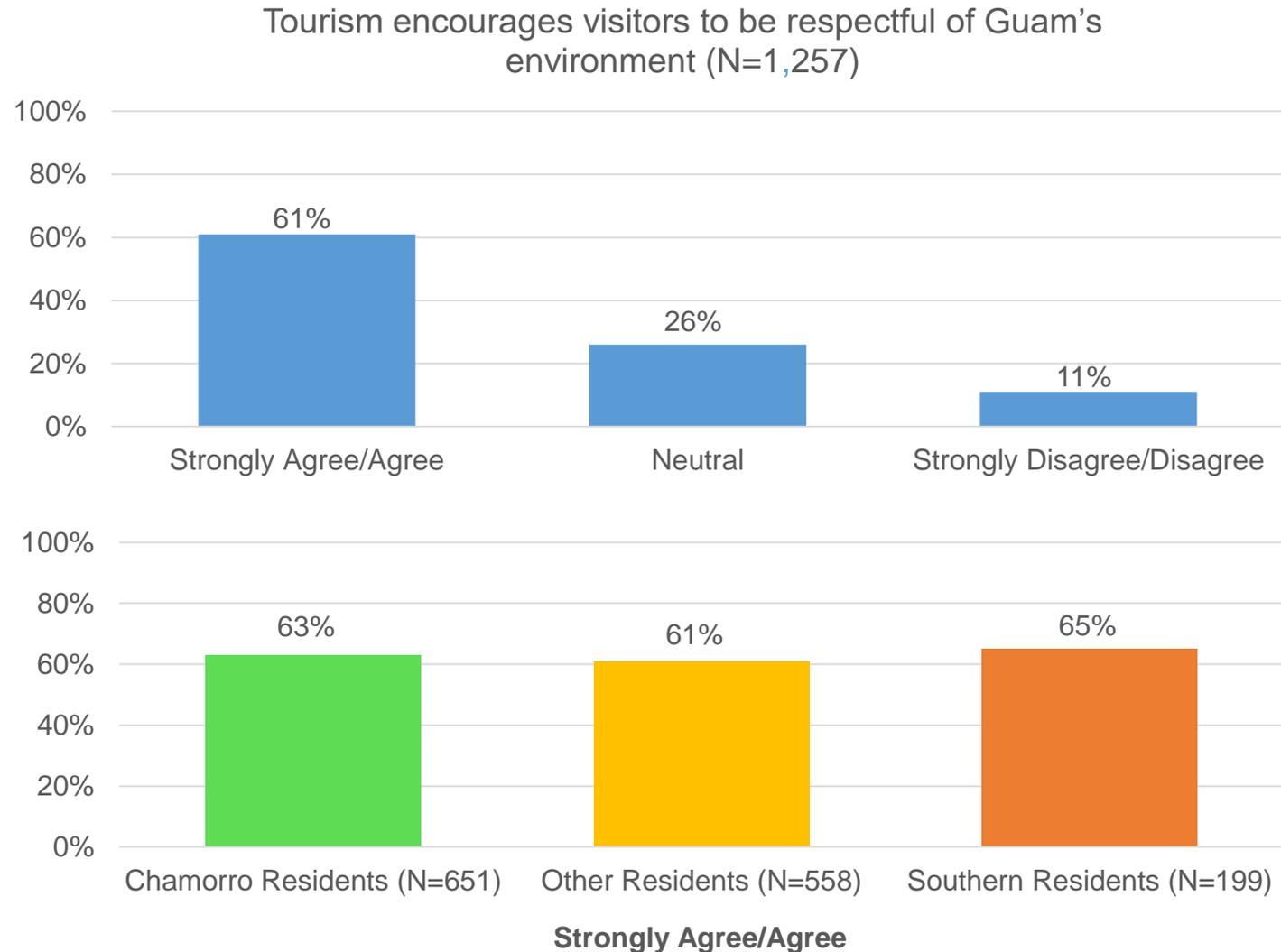


- Sixty-four percent (64%) indicated they strongly agreed or agreed that tourism encourages visitors to be respectful of Guam's culture.



- Sixty-one percent (61%) of residents on Guam strongly agreed or agreed that tourism encourages visitors to be respectful of Guam's environment.

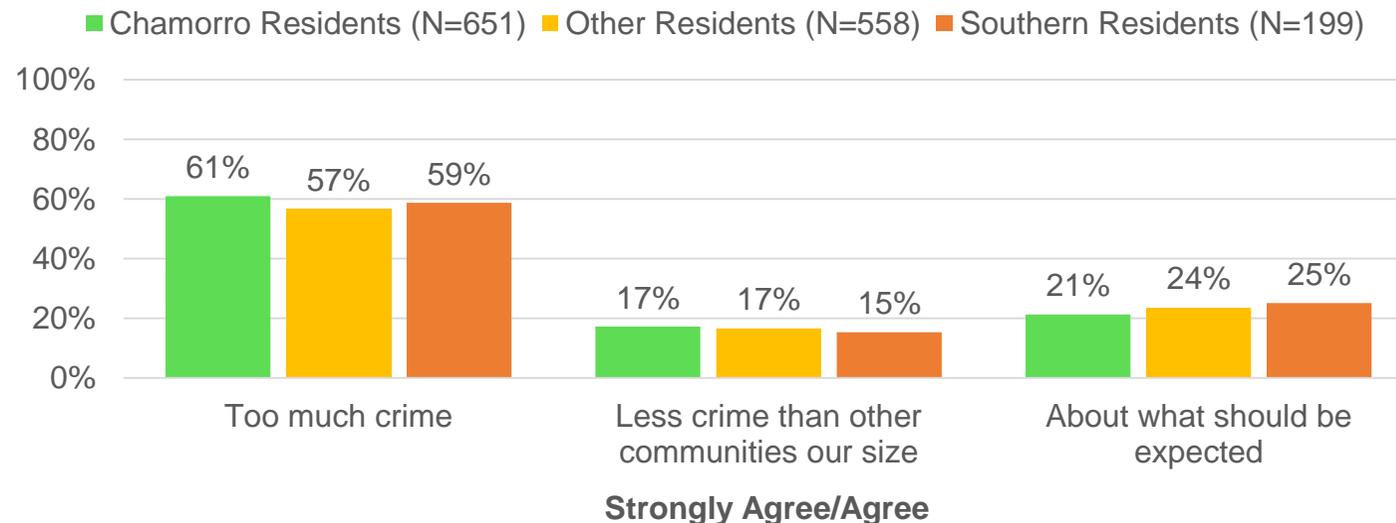
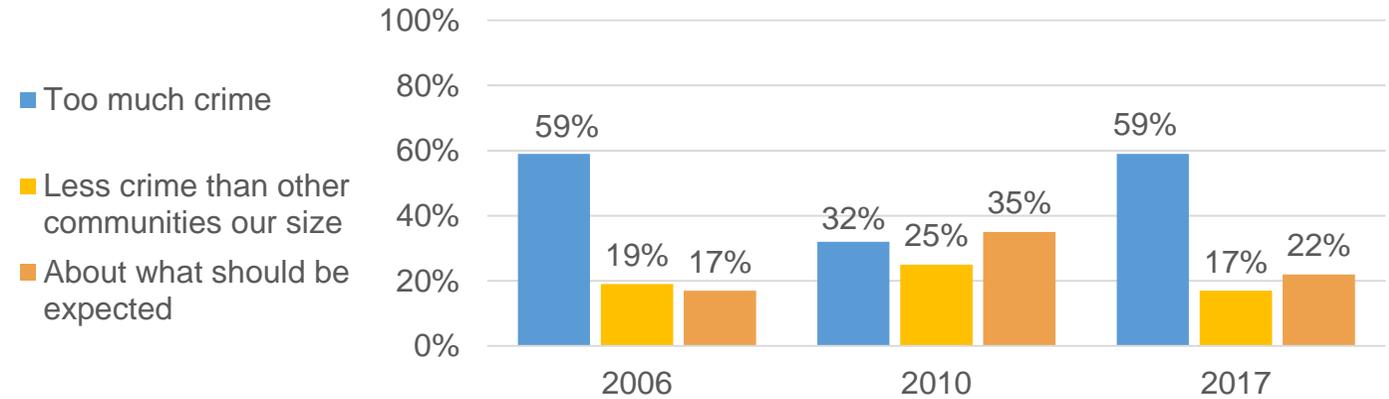
*Focus Group Comments:*  
"The masses that don't care for the environment is a negative."



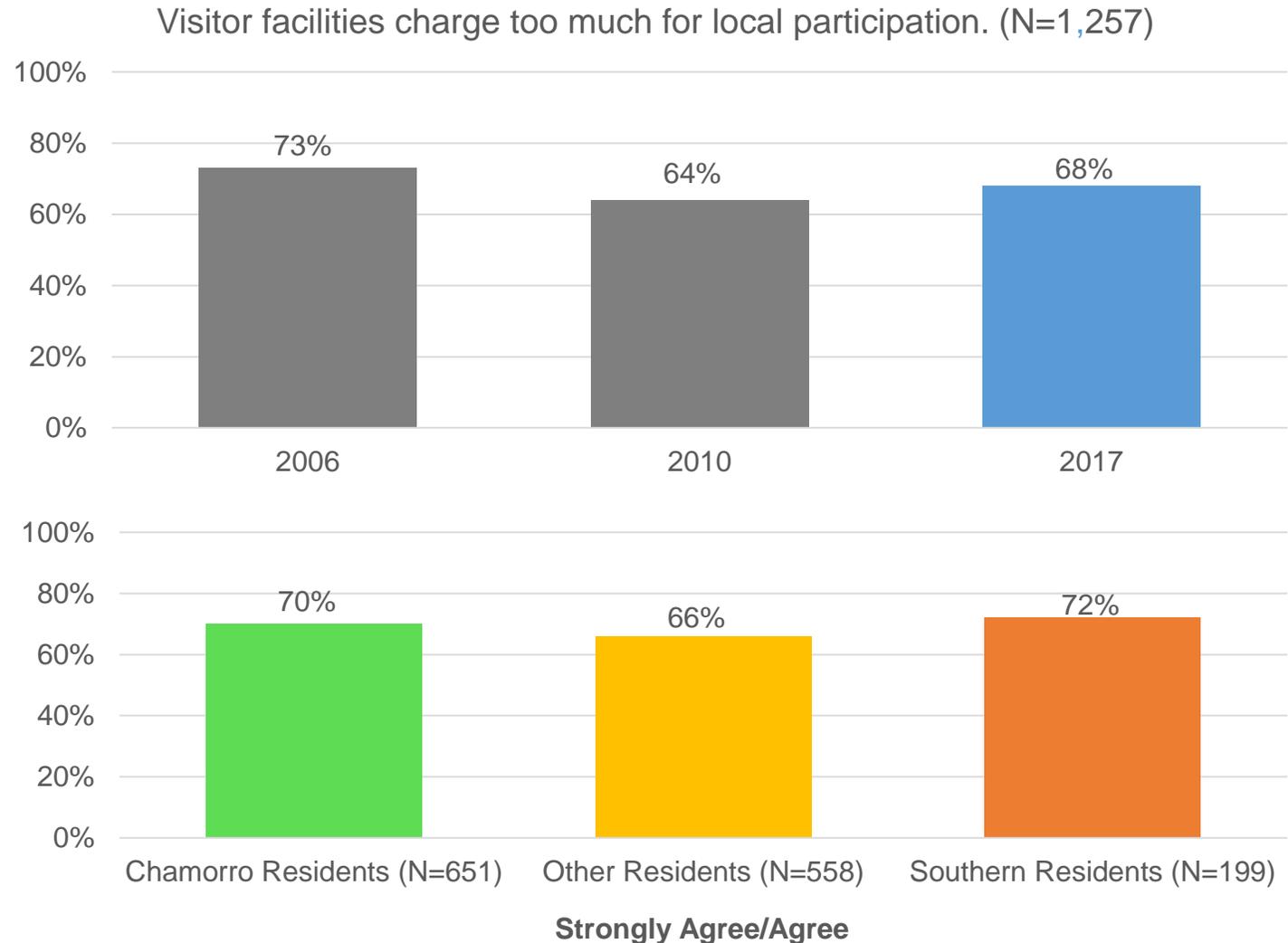
- One area that saw a decline in the Social Cultural and Environmental Indicators is in the area of residents perception of crime.
- The proportion of respondents agreeing to the statement that Guam has too much crime returned to the 2006 figure of 59% after declining to 32% in 2010.

*Focus Group Comments:*  
 “[GVB needs to] get more involved in assuring security for the community and visitors as the industry expands.”

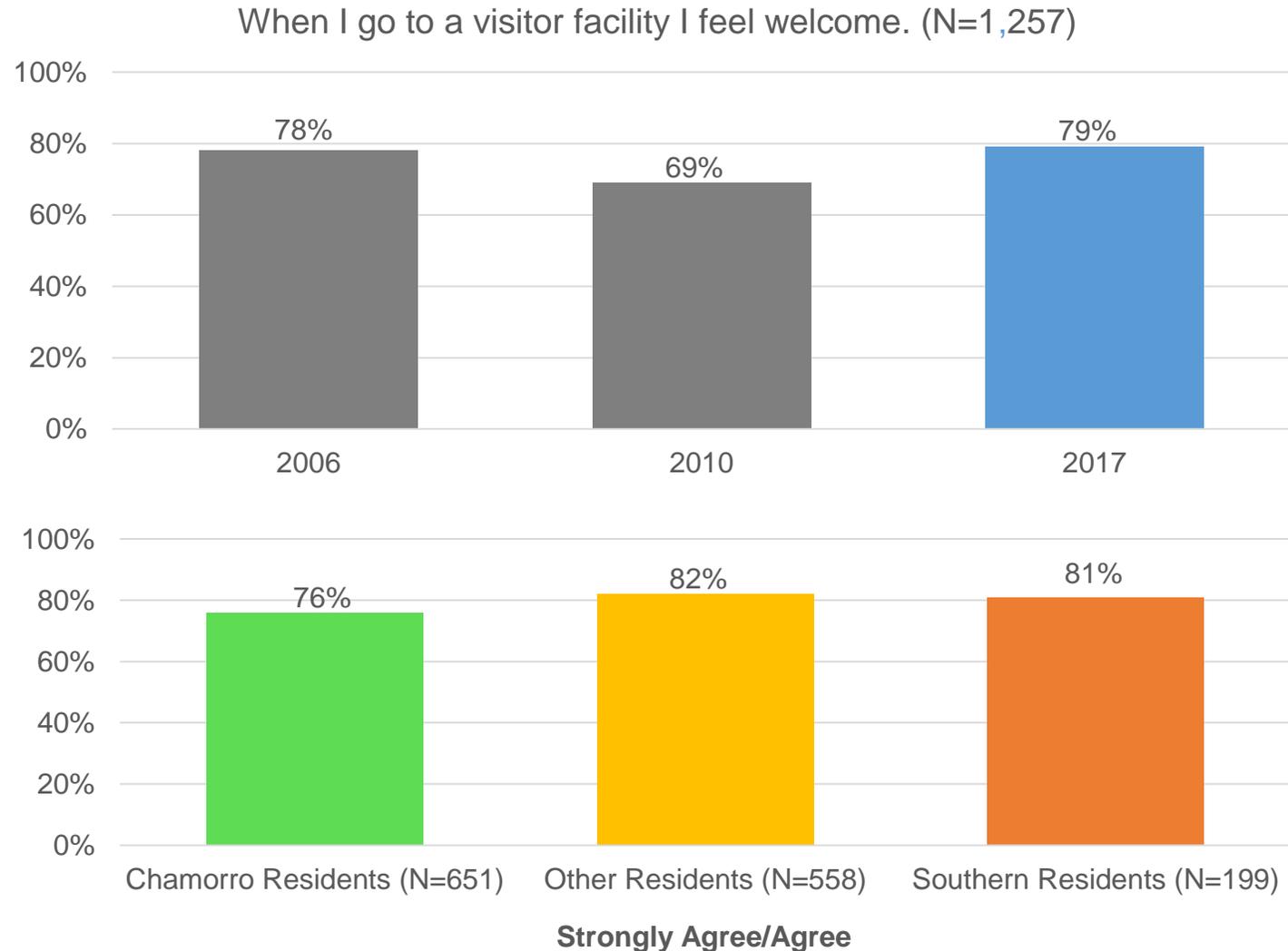
Understanding that all communities have crime to some degree, do you think Guam has ... (N=1,257)



- Proportion of residents agreeing to the statement “Visitor facilities charge too much for local participation” increased slightly to 68% from 64% in 2010, but lower than 73% in 2006.

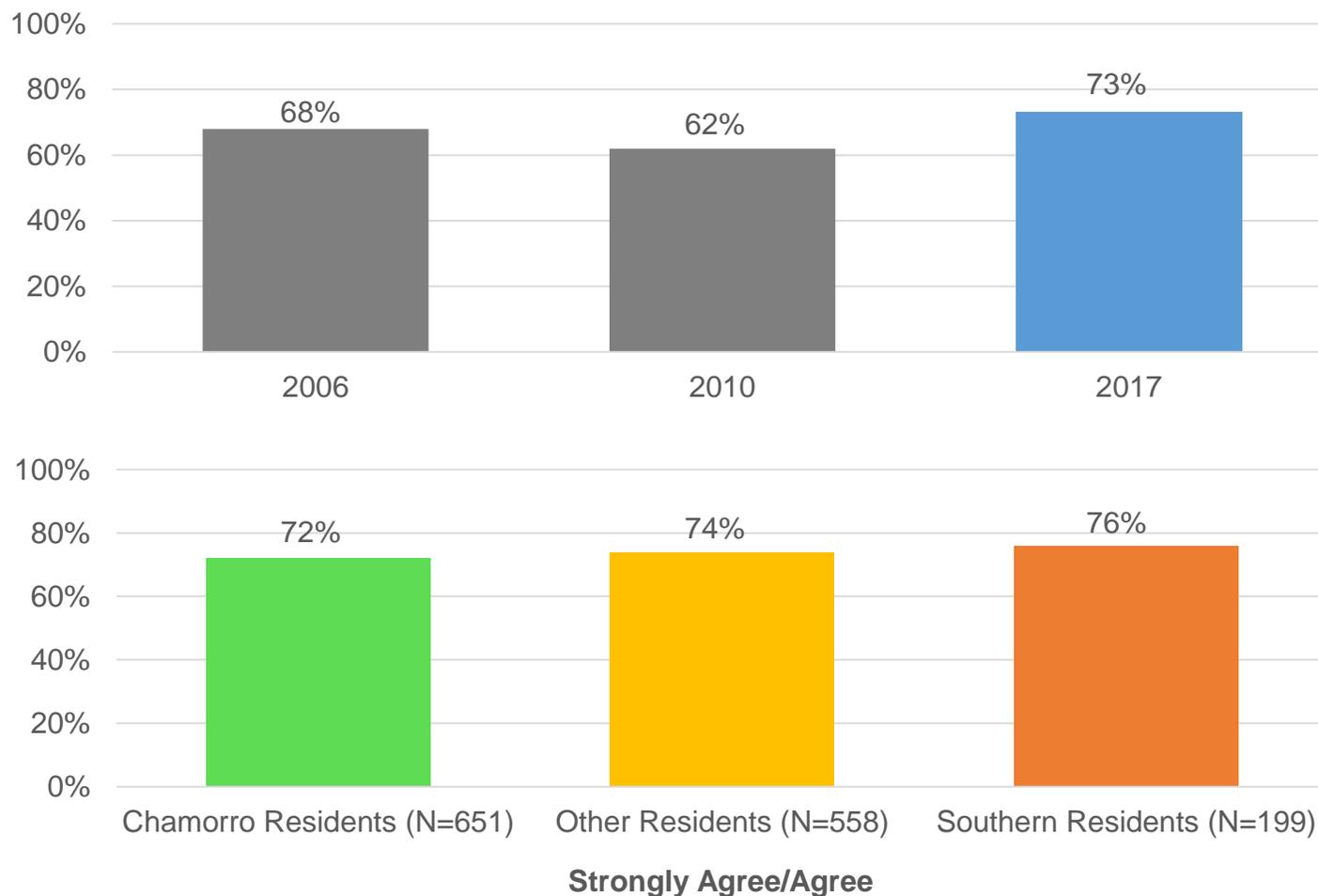


- Agreement to the statement “When I go to a visitor facility I feel welcome” increased to 79% in 2017 from 69% in 2010. The proportion of respondents agreeing to the statement in 2006 was 78%.

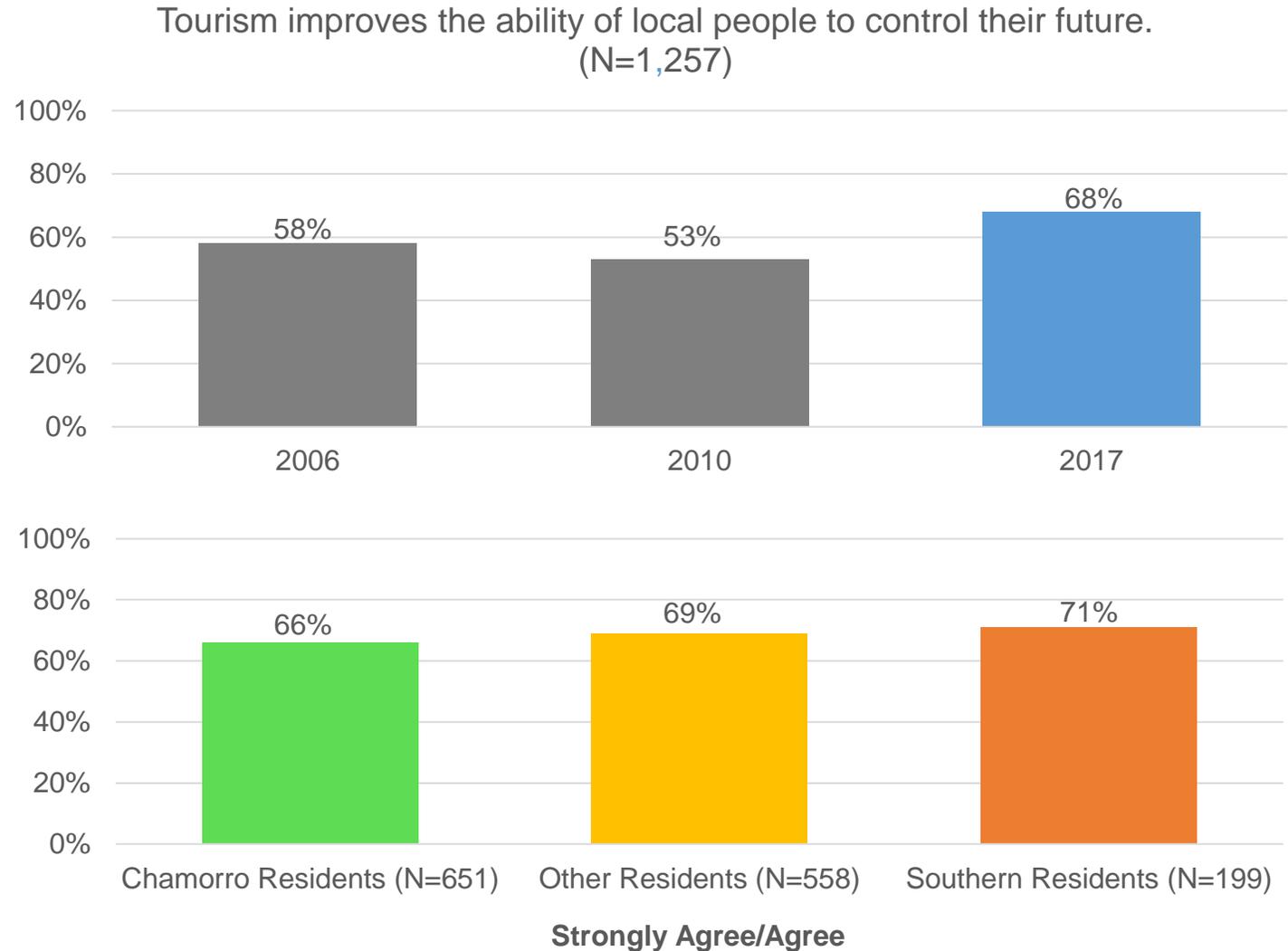


- There was a marked increase in the proportion of respondents who agreed to the statement “Tourism helps to preserve the Chamorro culture” in 2017 73% strongly agreed or agreed from 62% in 2010, and 68% in 2006.

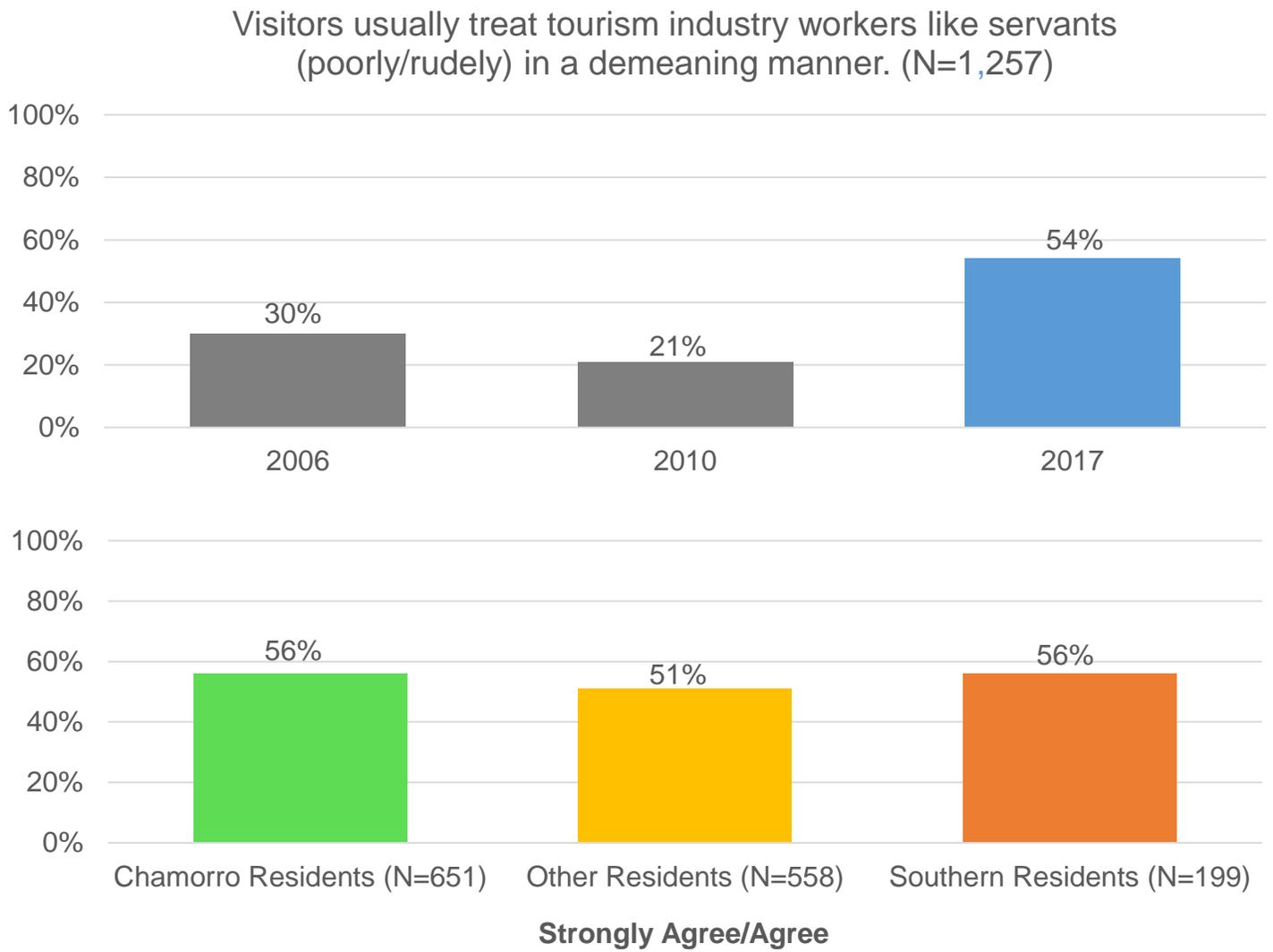
Tourism helps to preserve the Chamorro culture and language.  
(N=1,257)



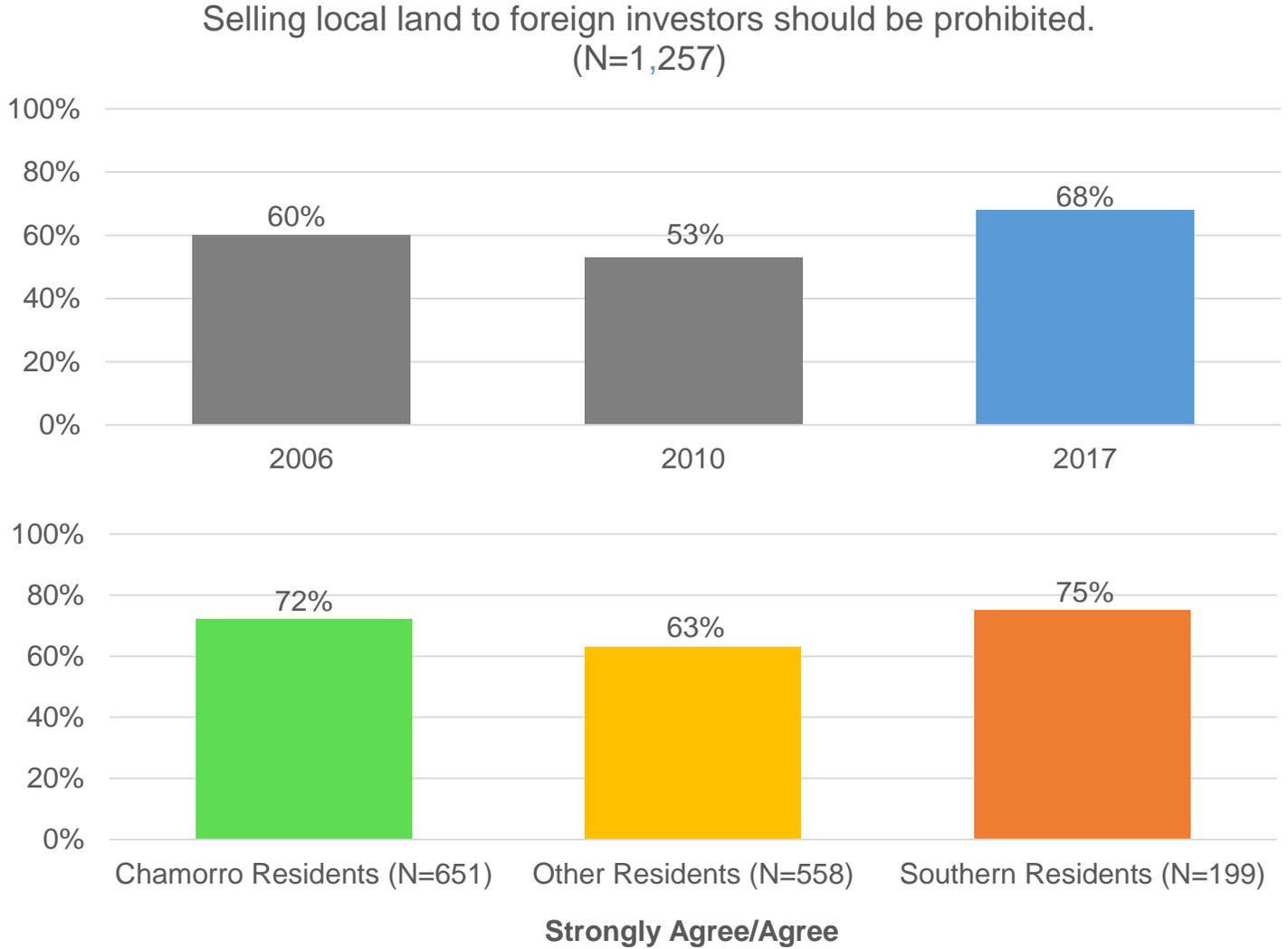
- There was also an increase in the proportion of respondents who strongly agreed or agreed with the statement “Tourism improves the ability of local people to control their future.” In 2017, 68% were in agreement compared to 53% in 2010 and 58% in 2006.



- Agreement with the statement “Visitors usually treat tourism industry workers like servants (poorly/rudely) in a demeaning manner” increased significantly from 21% in 2010 and 30% in 2006 to 54% in 2017.



- The proportion of respondents agreeing to the statement “Selling local land to foreign investors should be prohibited” increased to 68% in 2017 from 53% in 2010 and 60% in 2006.

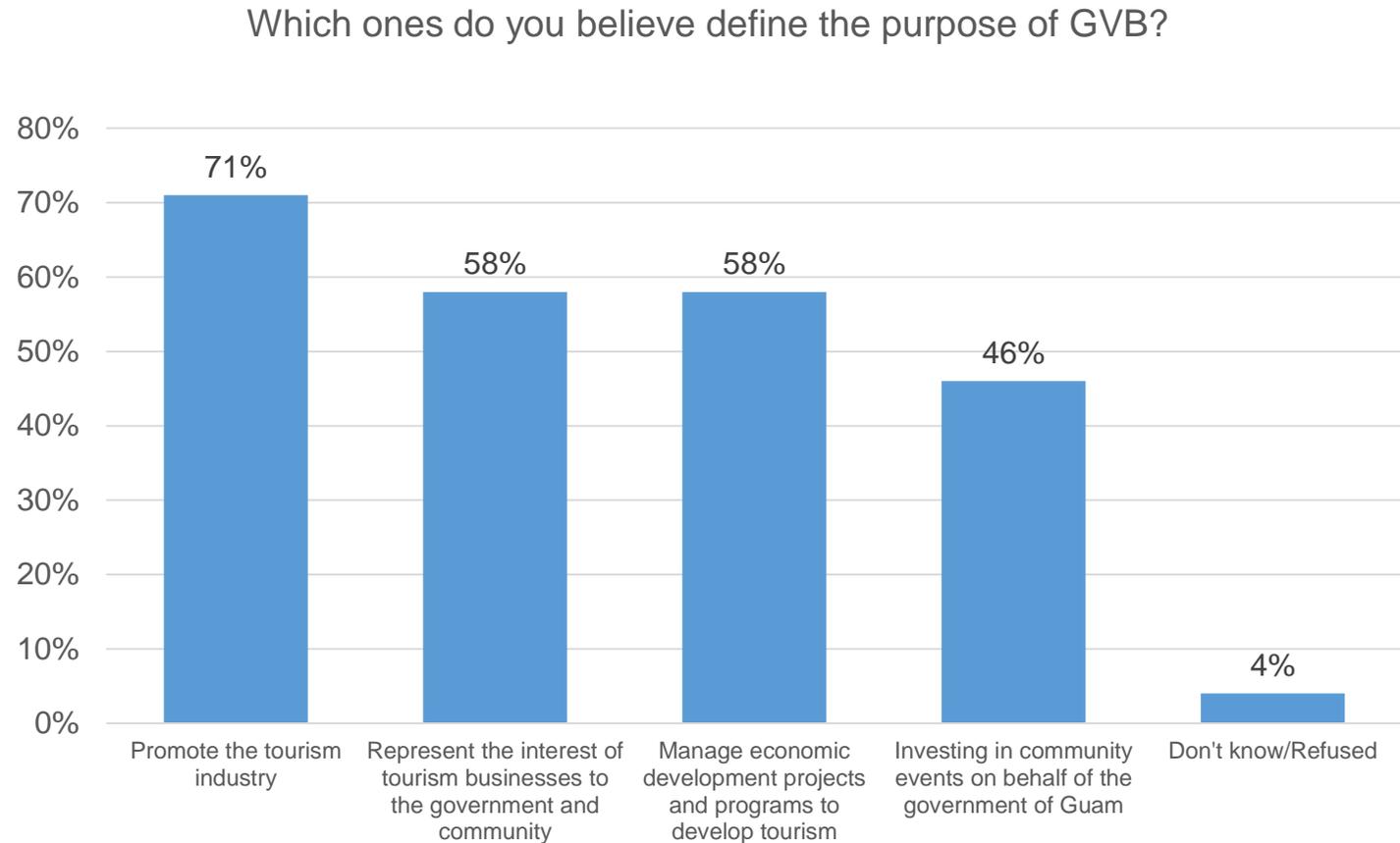


- The Social/Cultural/Environmental Indicators show an overall positive perception on Guam's social, cultural and environmental preservation. Residents perceive there is balance between the benefits from tourism and the preservation of culture, environment, and quality of life.
- Recent activities that have encouraged resident/tourist interaction via GVB-sponsored activities may have contributed to the perception that tourism enhances residents' quality of life specifically from tourism activities.
- Results from some statements are available for comparison with previous years' surveys on the topic concerning the number of visitors coming to Guam. Perception concerning the number of visitors coming to Guam and the way tourism industry workers are perceived to be treated by visitors show a negative trend.
- Results this year show an increase in the proportion of residents agreeing with the statement that Guam has too much crime.



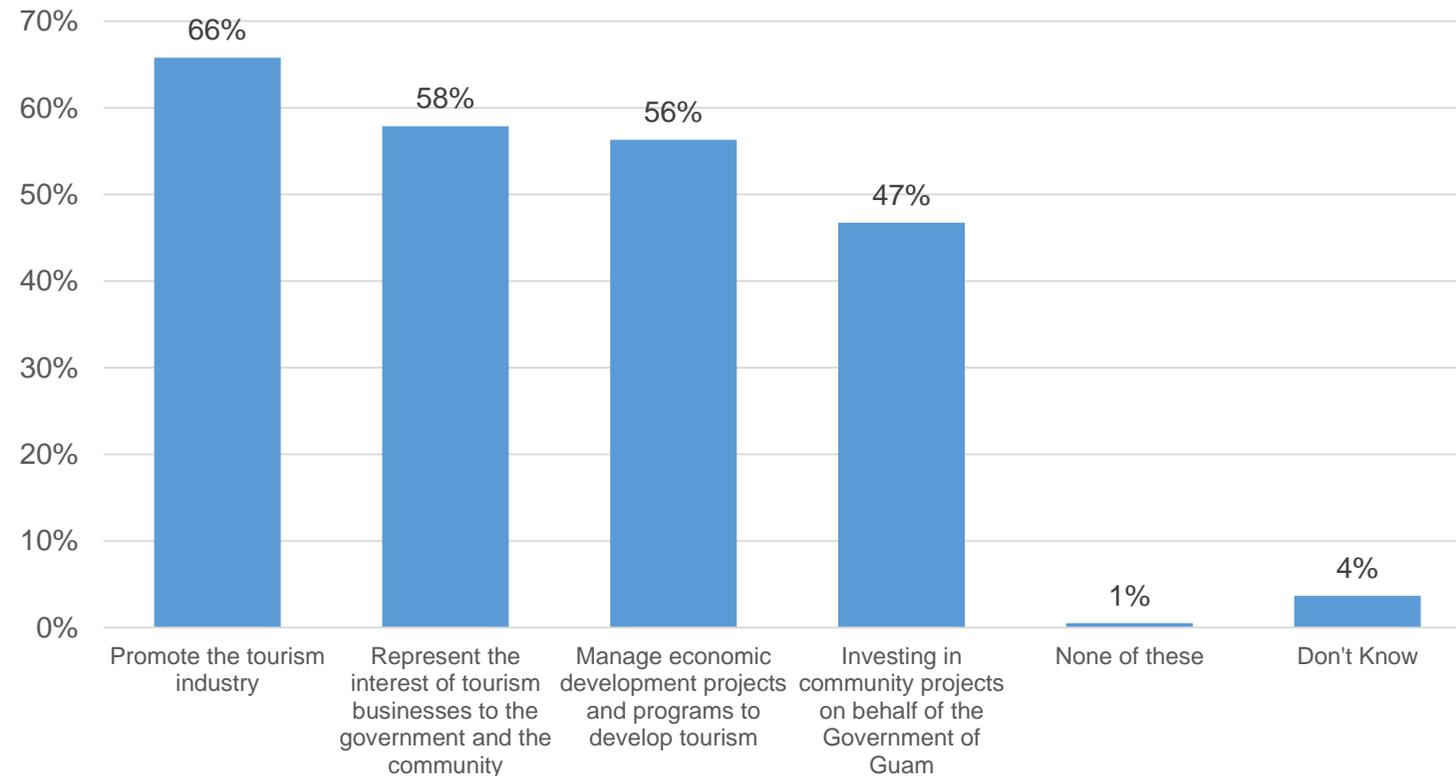
# Awareness and Perception of the Guam Visitors Bureau

- When respondents were asked what they believe defines the purpose of the Guam Visitors Bureau, most defined it as to “promote the tourism industry” (71%).
- Over half defined GVB’s purpose as either to represent the interest of tourism businesses to the government and community, or to manage economic development projects and programs to develop tourism (58%, respectively).



- When asked to select the things GVB should be responsible for, most respondents indicated that GVB should be responsible for promoting the tourism industry (66%).

Which ones should GVB be made responsible for?



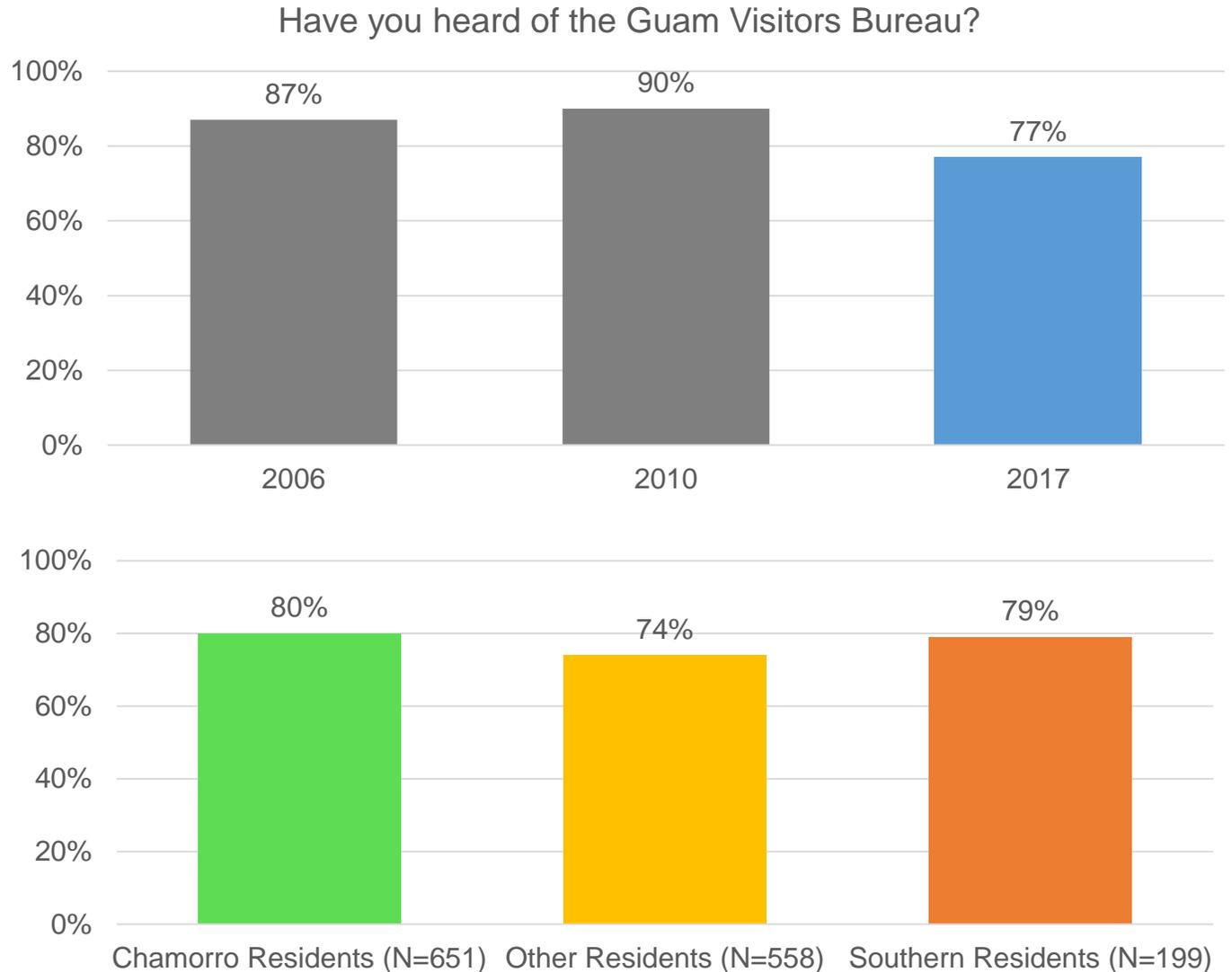
***Focus Group Comments:***

“There seems to be more of a disconnect between GVB and those other organizations that could support tourism in a more organic way to support the legs of tourism.”

# Awareness of the Guam Visitors Bureau

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- When asked if they had heard of the Guam Visitors Bureau, about three quarters (77%) indicated they had.
- Chamorros (80%) and southern residents (79%) were more likely to have heard about GVB than other residents (74%).

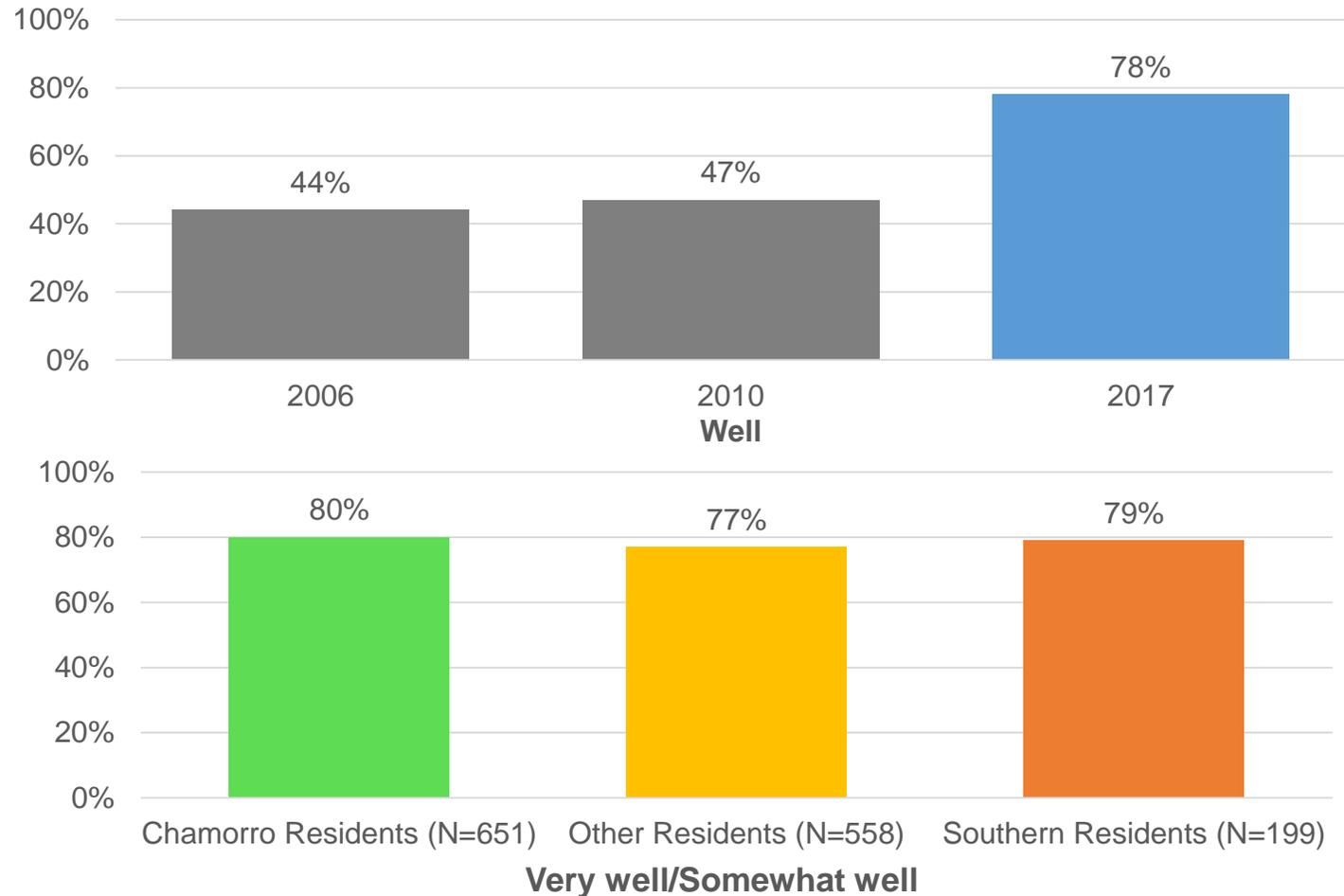


- Almost eight in ten of those surveyed overall (78%) had stated they thought GVB was doing either “very well” or “somewhat well” in promoting Guam’s tourism.
- This is significantly higher than what was reported for the surveys conducted in 2006 (44%) and 2010 (47%).

**Focus Group:**

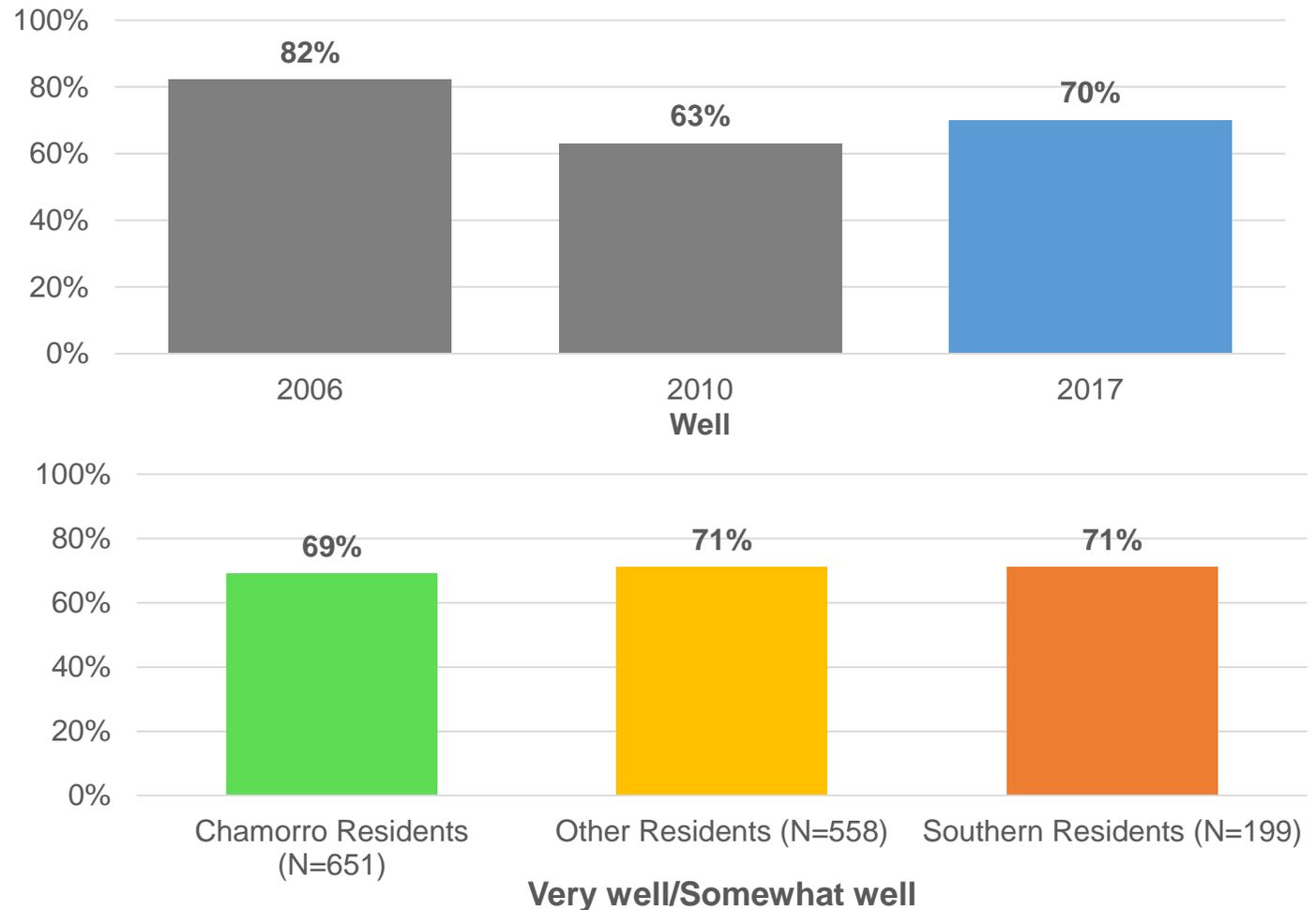
- “GVB allowed the Government to generate more revenue, with more buildings coming up. . . Hagatna looks great.”
- “There’s a lot of foresight in the planning to improve [tourism] and I think that’s what people want to see when they come to Guam, besides just the beach.”

How well would you say GVB is doing in promoting Guam tourism?  
Amongst those who were familiar with GVB, N=979



- Seven in ten (70%) of those surveyed stated that GVB is doing “very well” or “somewhat well” in promoting Guam’s culture.
- There was little difference in how Chamorros and residents of the south rated GVB’s job of promoting Guam’s culture.

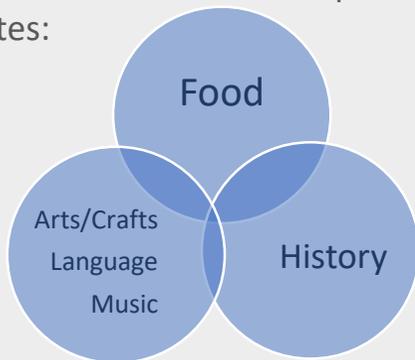
How well would you say GVB is doing in promoting Guam’s culture?  
*Amongst those who were familiar with GVB, N=979*



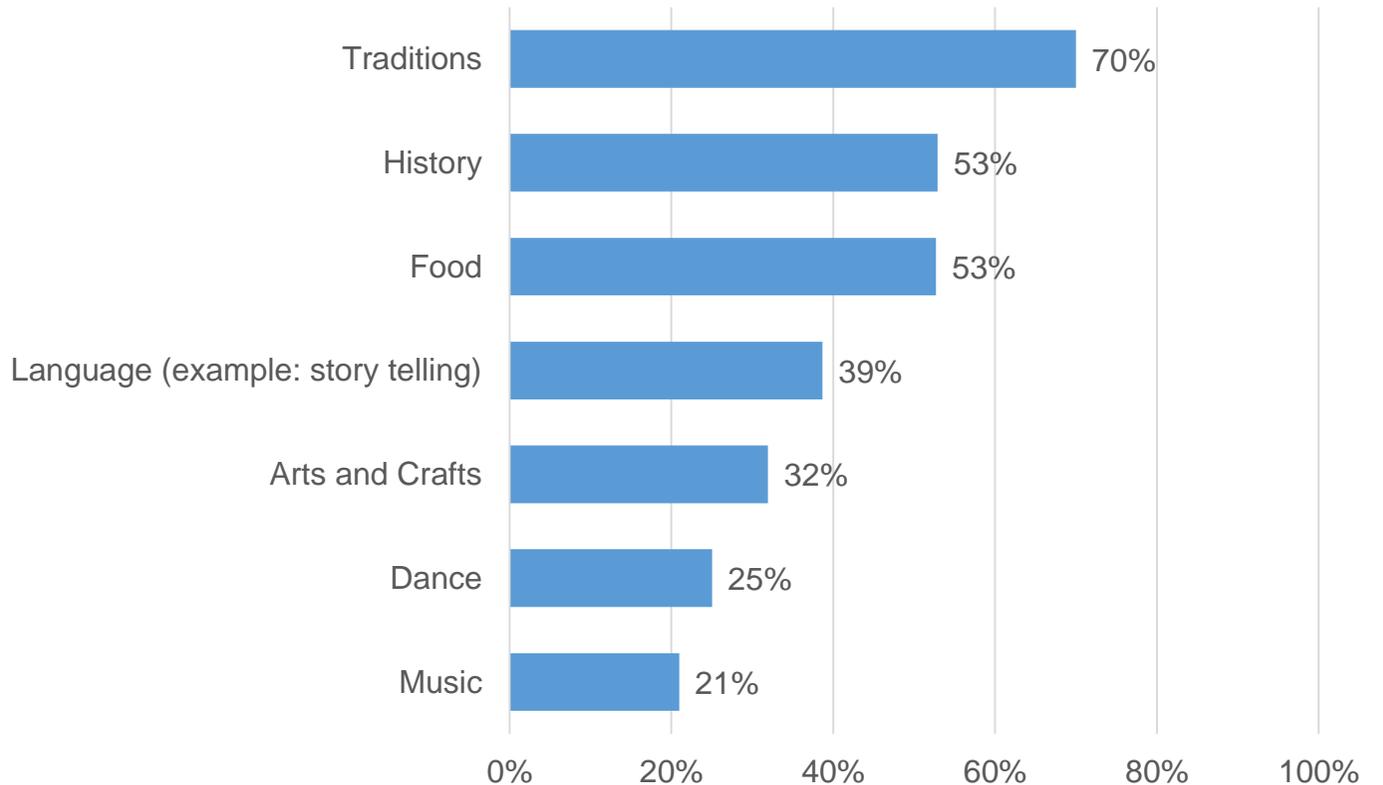
- When asked about the most important items of Guam's culture that should be promoted to visitors, the top three mentioned were traditions (70%), history (53%) and food (53%).

**Focus Group:**

When asked on what GVB should highlight when defining Guam's cultural identity, the respondents identified the top three attributes:

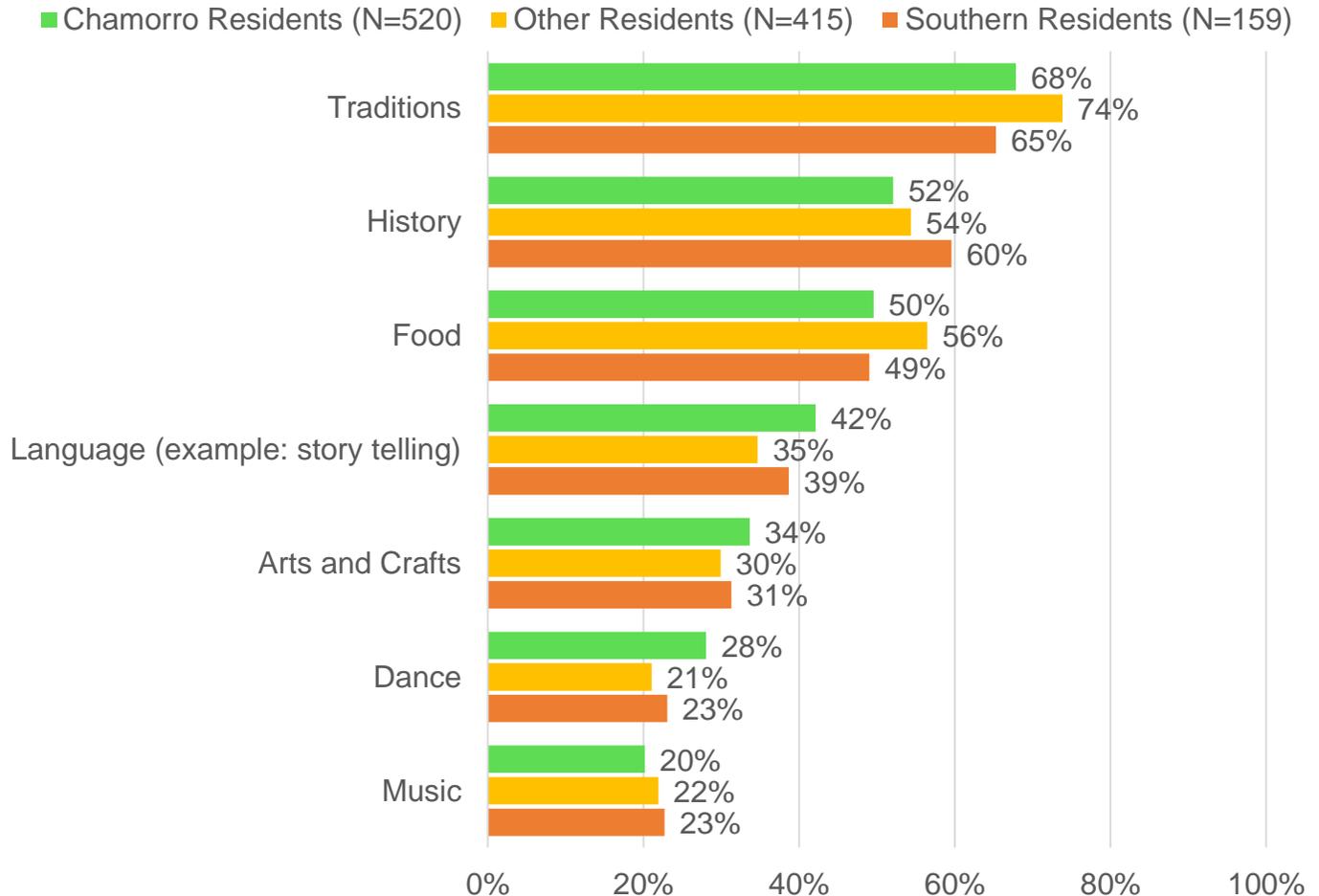


What are the most important items that GVB should promote in presenting Guam's culture to visitors? (N=979)



- Chamorro, Other, and Southern residents' agreed that the top three cultural elements should be traditions, history and food.
- However, Other residents were more likely to indicate a stronger focus on traditions (74%) than either Chamorro (68%) or Southern residents (65%).
- Southern residents were more interested in history being promoted (60%) than either Chamorro residents overall (52%) or other residents (54%).

What are the most important items that GVB should promote in presenting Guam's culture to visitors? (N=979)

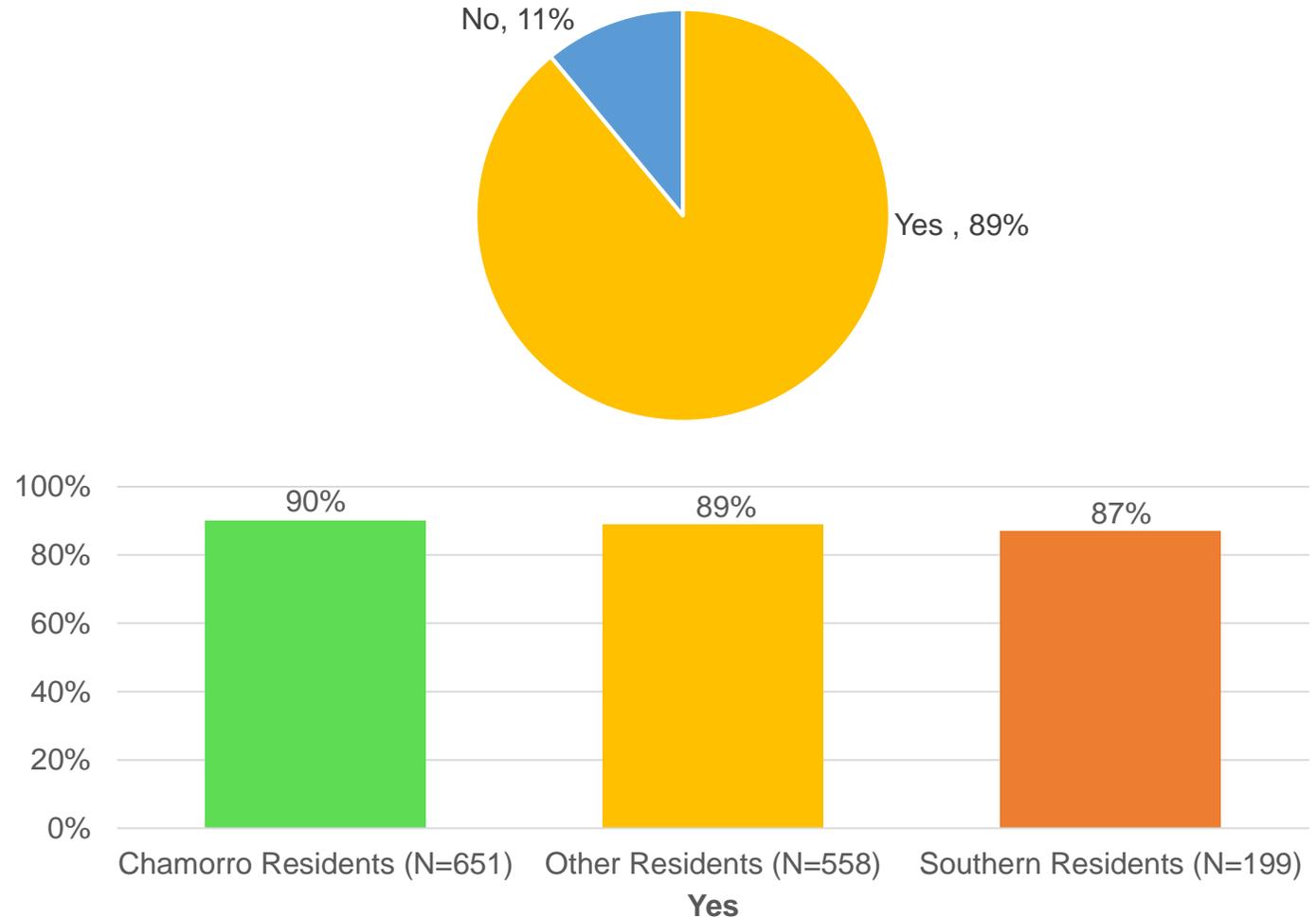


- When asked if there should be more tourism-related opportunities and businesses outside of Tumon, almost nine in ten of those surveyed (89%) said yes.
- Ninety percent (90%) of Chamorros overall, and 86% of Southern residents also agreed there should be development outside of Tumon.

**Focus Group Comments:**

- *“There’s a greater opportunity to encourage other people to open up their small businesses and cater to the tourists coming outside of Tumon.”*
- *“Put more money out to businesses outside of Tumon to help them survive.”*

Do you think there should be more tourism-related opportunities and businesses outside of Tumon Bay in general? (N=1,257)

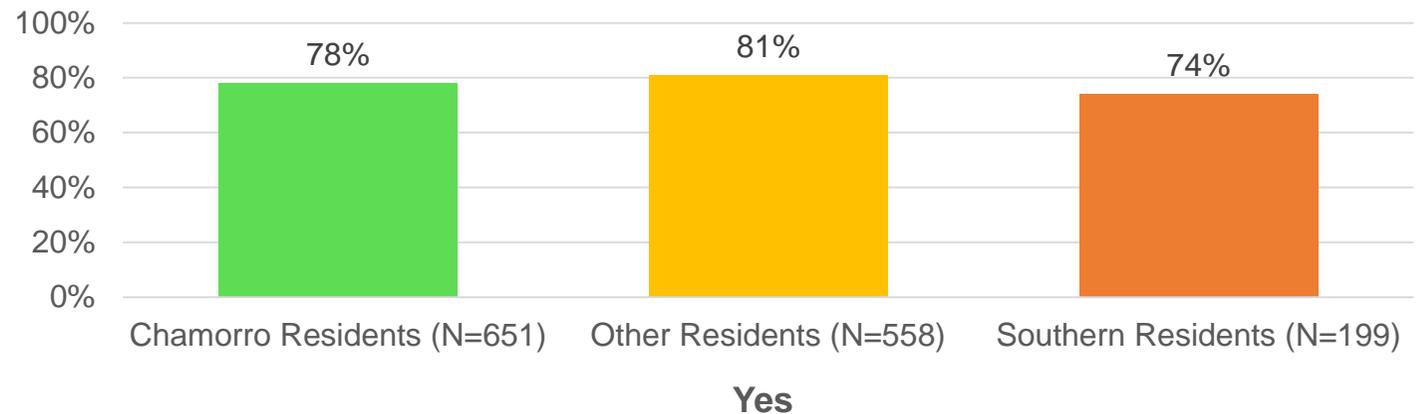
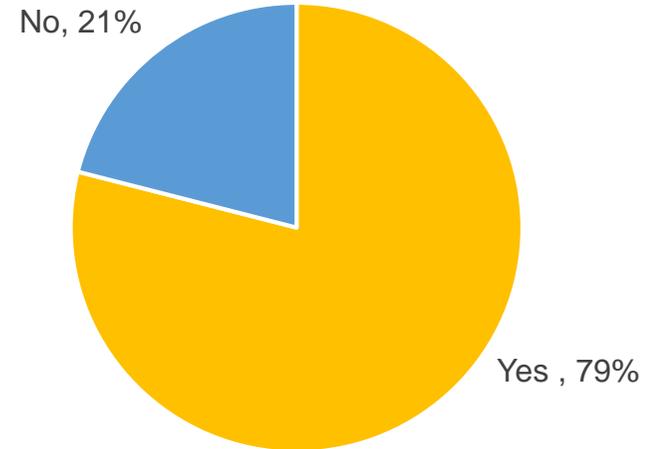


- When asked if there should be more tourism-related opportunities and businesses specifically in the southern region of the island, more than three quarters of Chamorros (79%) said yes.
- A similar, but lower proportion of southern residents (74%) favored development in the south.

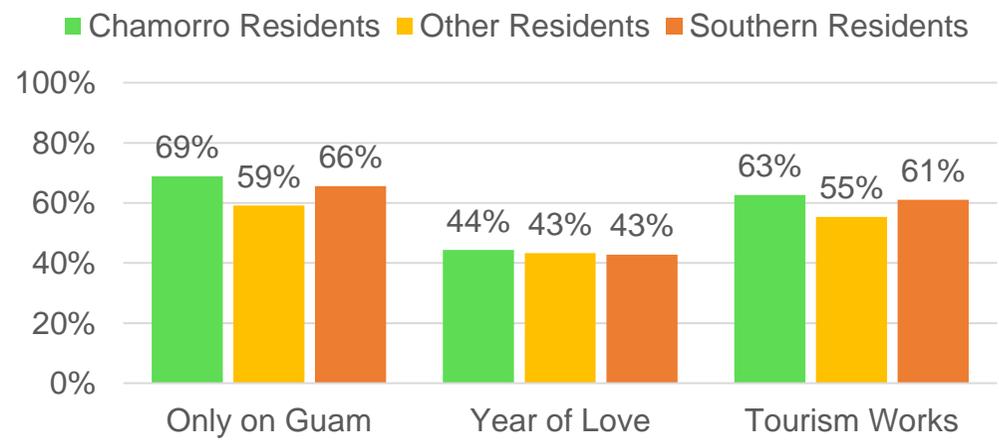
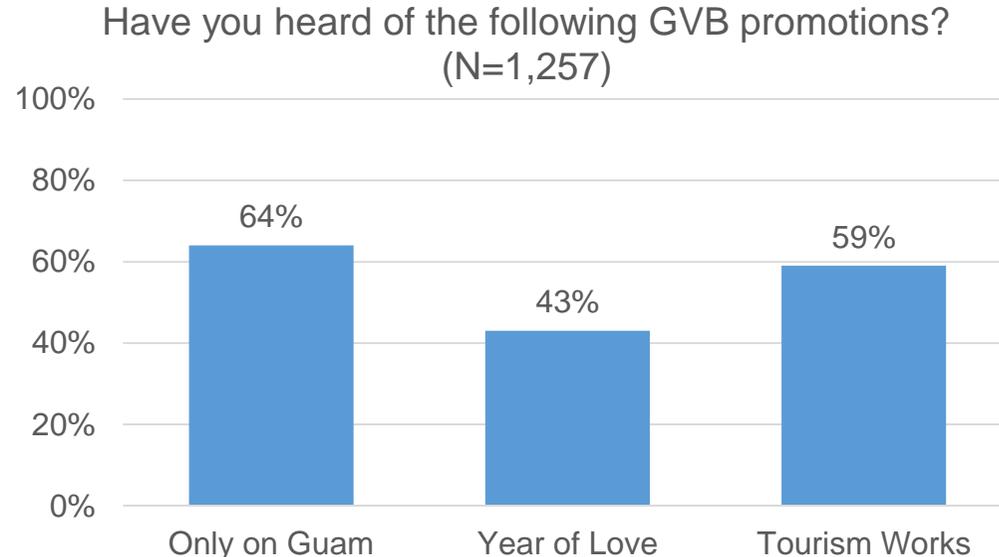
Focus Group Comments:

*“Before you wouldn’t see a tourist down at Inarajan pool but now, you’ll see them coming in by the bus load.”*

Do you think there should be more tourism-related opportunities and businesses specifically in the Southern region of the island?  
(N=1,257)



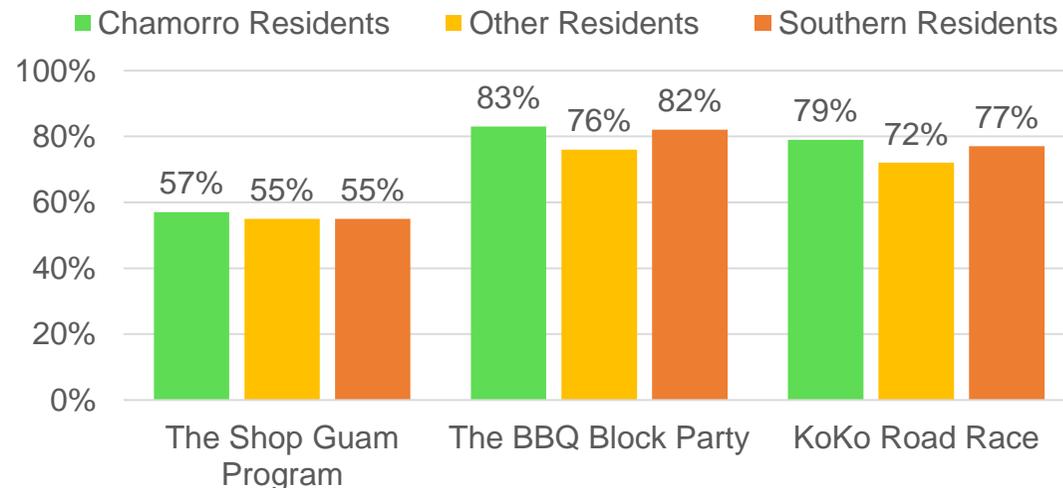
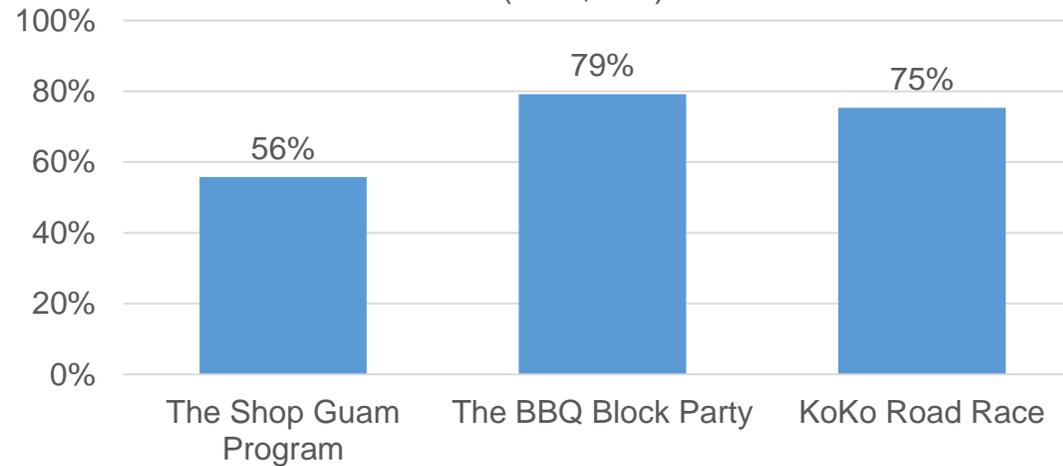
- Respondents were asked if they were familiar with three GVB promotions. Only on Guam (64%) was most frequently mentioned, followed by Tourism works (59%) and Year of Love (43%) .
- Only on Guam (69%) and Tourism Works (63%) were most familiar to Chamorros.
- Year of Love was recognized by 43% of all respondents.



# GVB Signature Events (1/2)

- Respondents were mostly familiar with all of GVB signature events. The BBQ Block Party was recognized by 79% of all respondents.
- The KoKo Road Race was more familiar to residents this year (75%) when compared to the previous survey in 2010 (52%).

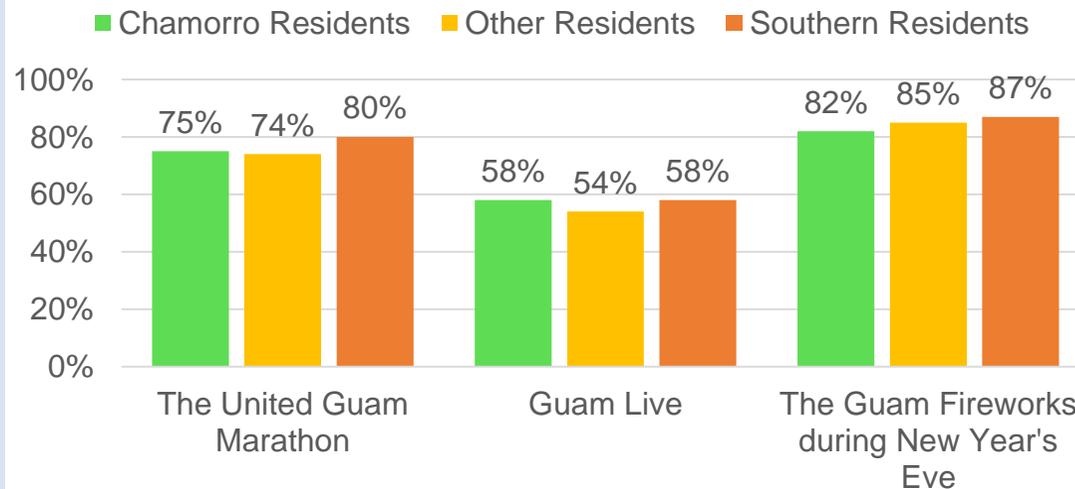
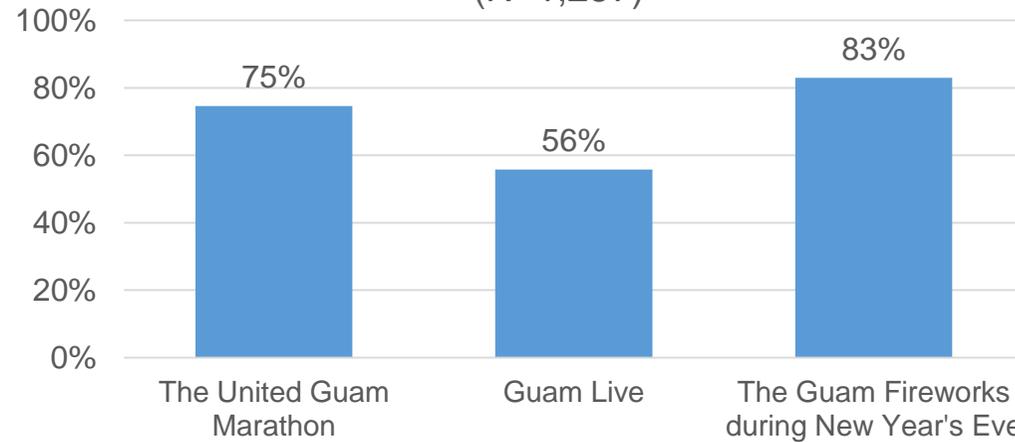
Have you heard of the following GVB signature events?  
(N=1,257)



# GVB Signature Events (2/2)

- The most familiar GVB signature event was the Guam Fireworks during New Year's Eve (83%).
- People from the South were more likely to be familiar with the United Guam Marathon (80%), compared to Chamorros overall (75%) and other ethnicities (74%).

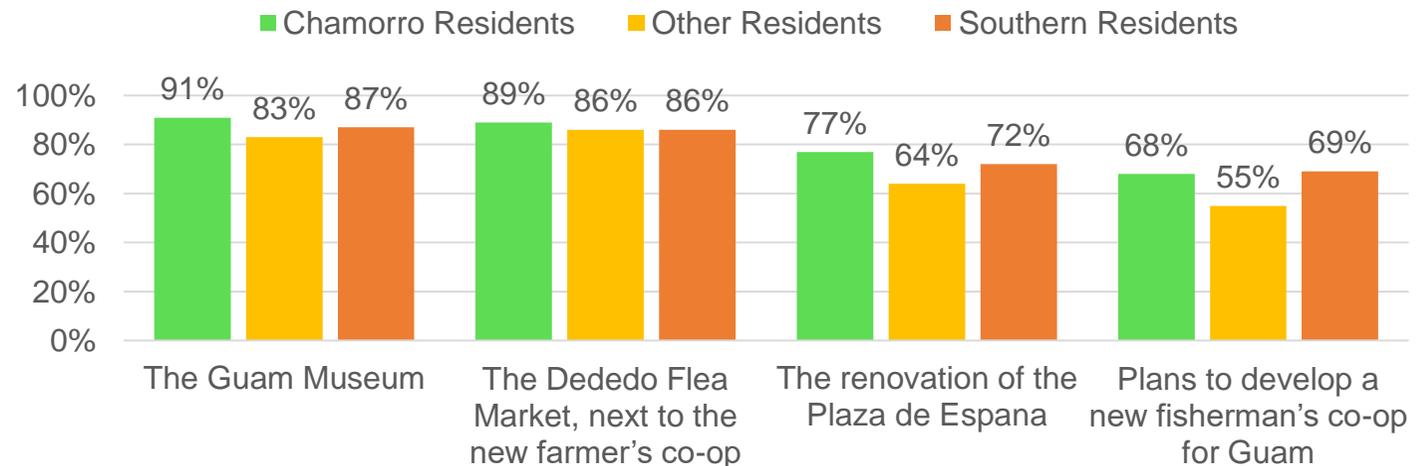
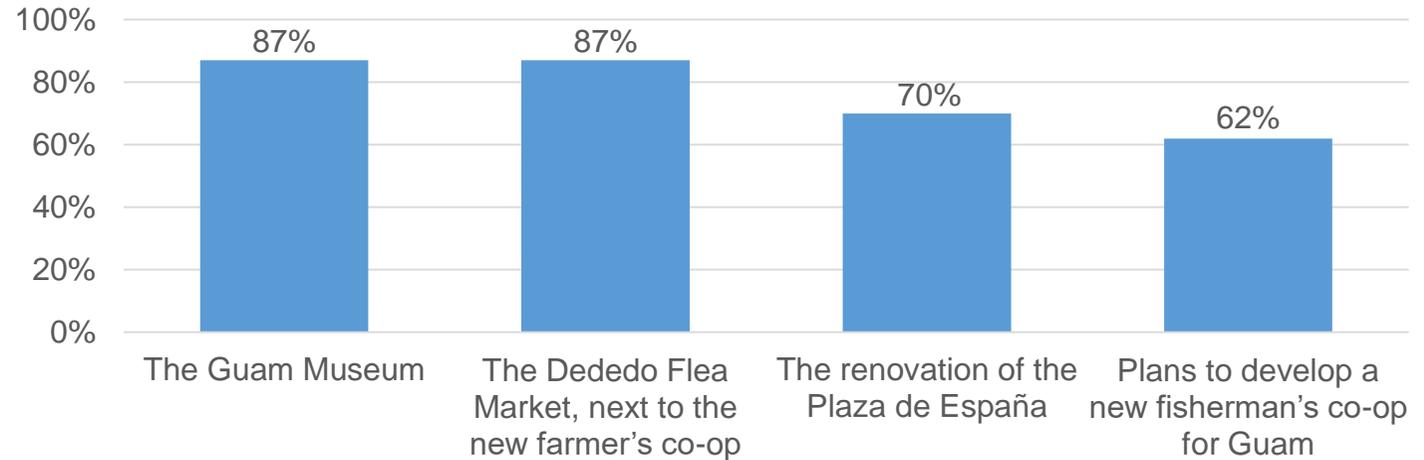
Have you heard of the following GVB signature events?  
(N=1,257)



# HOT Bond Project Familiarity

- When asked about various HOT Bond projects, nearly nine in ten respondents (87%) were familiar with either the Guam Museum or the Dededo Flea Market. Most of those surveyed were also familiar with the renovation of Plaza de España (70%) and the new fisherman's co-op (62%).
- Chamorros overall and Southern residents were more likely to be familiar with these projects than other ethnicities.

Have you heard of the following? (N=1,257)

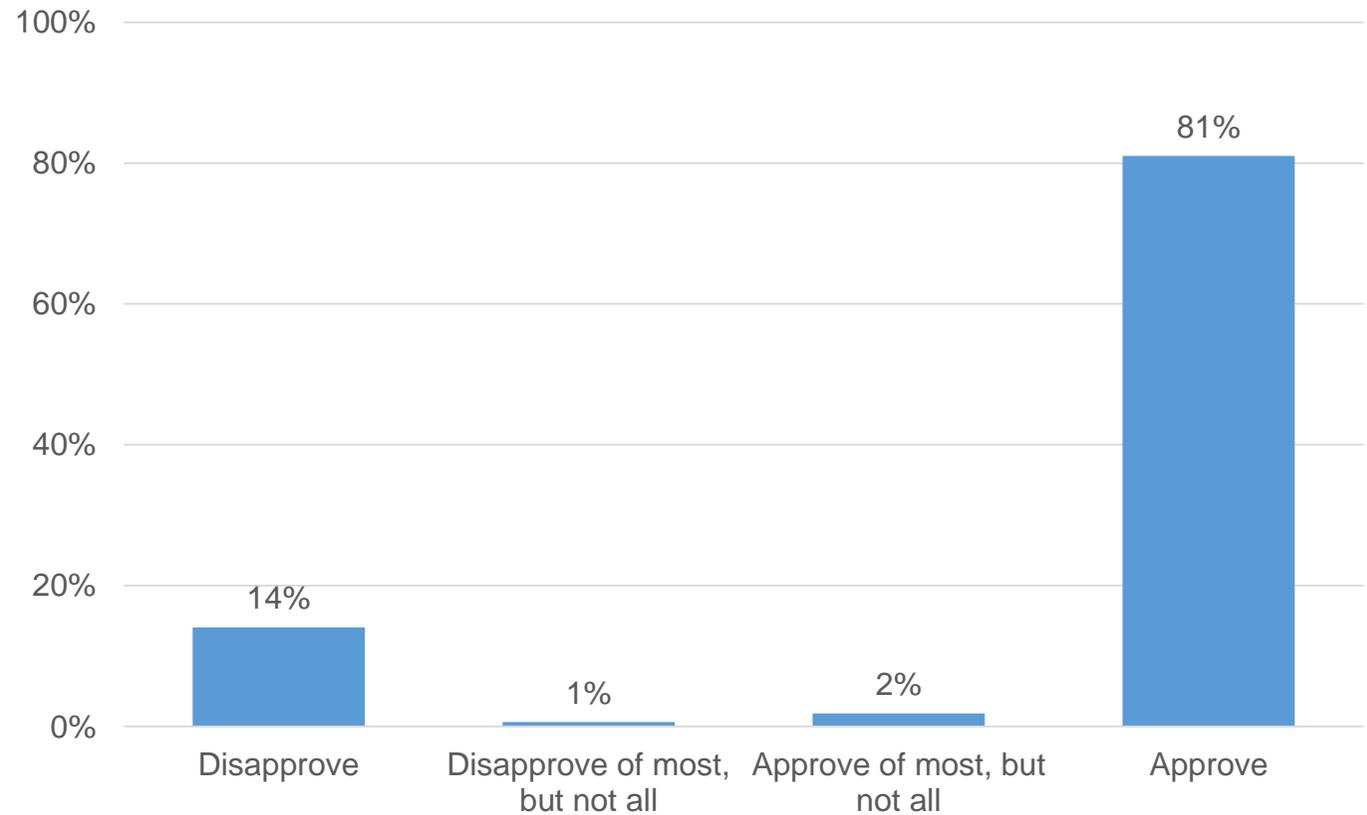


- Respondents overwhelmingly claimed to approve of using hotel tax revenue for developing such projects (81%).

Focus Group Comments:

*“If the revenue increases because the number of tourist increases doesn’t mean the GVB budget should increase. If we’re generating new facilities with HOT it only makes sense that some of that budget helps sustain the buildings being built. Any excess of the fixed budget should go out the community.”*

Do you approve or disapprove of the use of hotel tax revenue for developing projects such as these? (N=1,257)

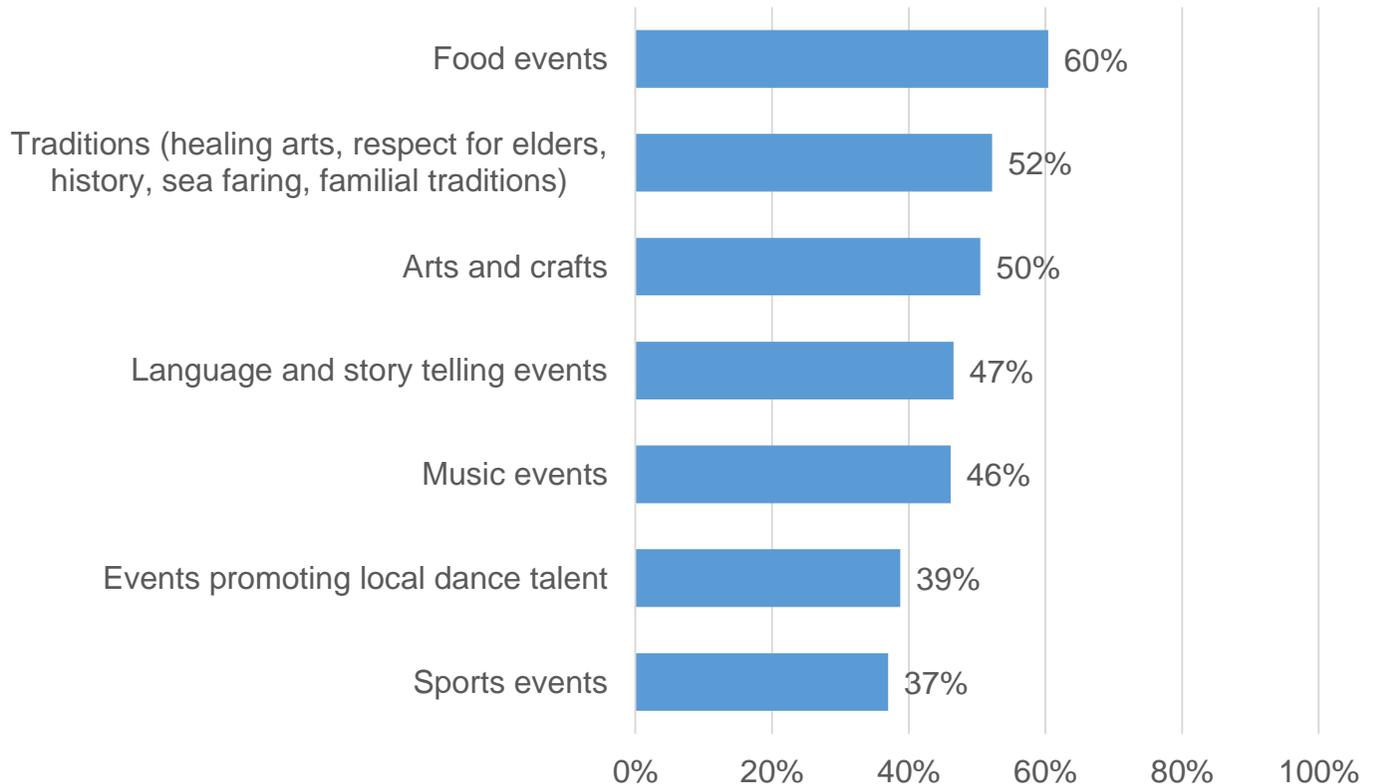


# Future GVB-Sponsored Events Interest

62

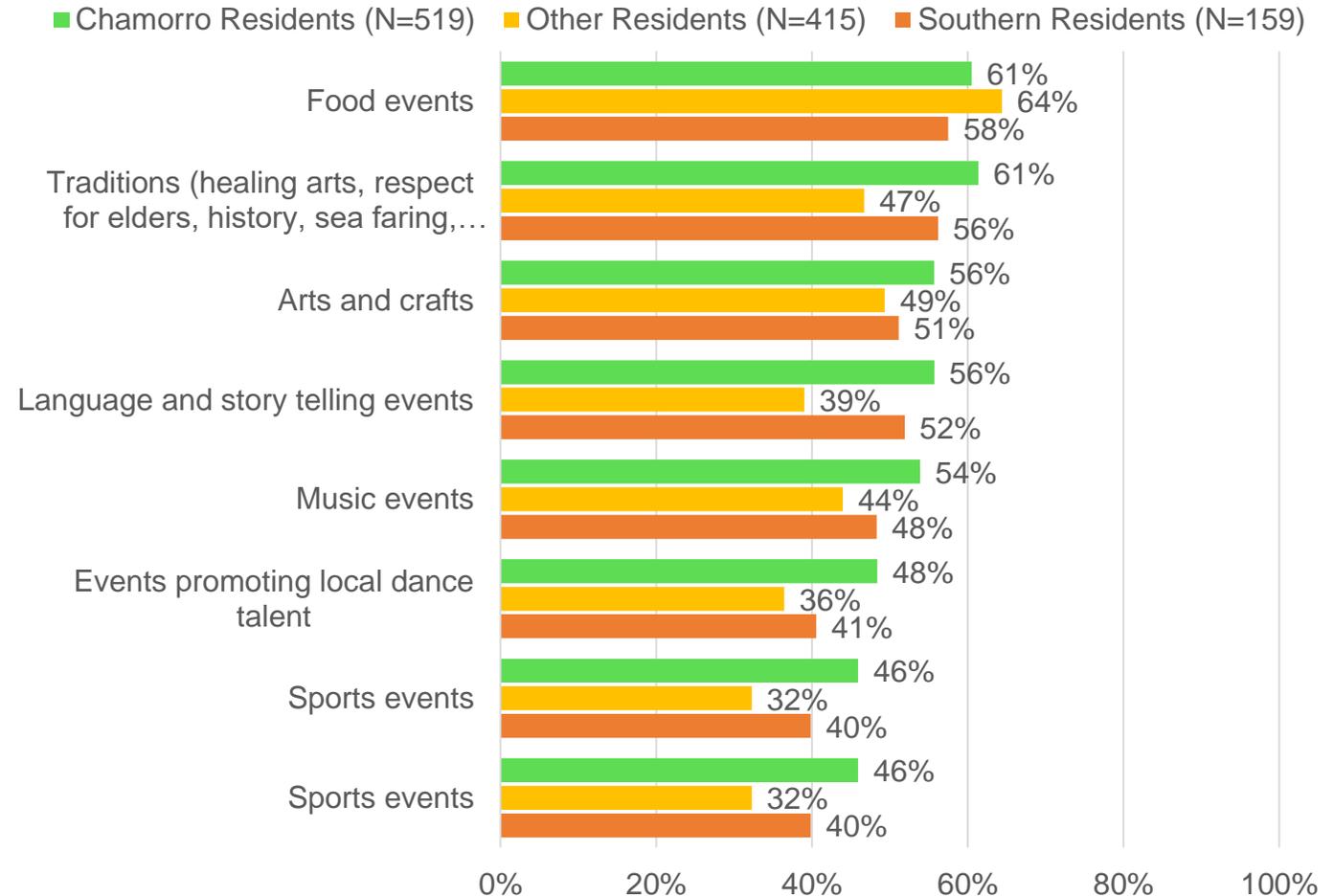
- When asked about potential types of GVB-sponsored community events, respondents indicated the most interest in food events (60%), traditions events (52%), and arts/crafts events (50%).

Thinking of community events GVB might sponsor in the future, in which ones would you participate? (N=978)



- Almost half of all Chamorro residents indicated interest in every category.
- Chamorro residents (61%) and Southern residents (56%) were most interested in an event focused on traditions than other residents (47%).
- This is also true for events focused around language and story telling, in which 39% of other residents were interested compared to 56% of Chamorro residents and 52% of Southern residents.

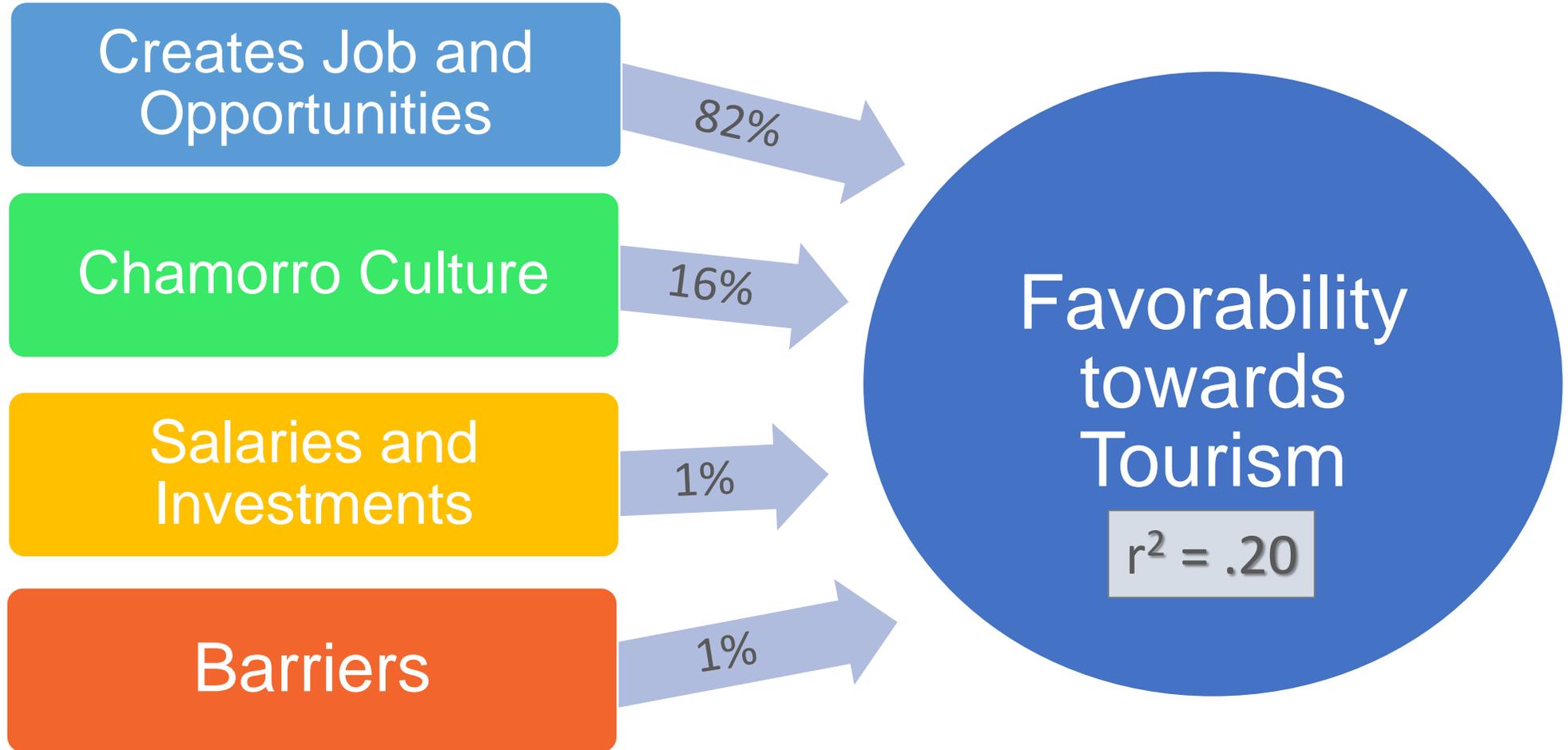
What are the most important items that GVB should promote in presenting Guam's culture to visitors? (N=979)



- Ratings of GVB's performance has increased significantly since 2010.
- Residents believe that GVB is doing a good job in promoting Guam and in promoting Guam's Culture.
- Residents indicated that GVB should focus on traditions, history and food when promoting Guam's culture to visitors.
- GVB is recognized by more than three quarters of those that live in Guam. Residents that are familiar with GVB are more likely to support GVB projects and initiatives.
- Recognition is high for GVB's signature events, all of which are recognized by more than 50% of all residents with the exception of the "Year of Love" campaign which was recognized by 43% of those asked.
- Residents surveyed were familiar with various "Hot Bond" projects and highly agree with the use of Hotel Occupancy Tax revenues for these purposes.
- For future GVB-sponsored community events, residents indicated high interest in Food, Traditions, and Arts/Craft events.

To gain insight into the factors that explain why residents feel positively towards the tourism industry in Guam a “Drivers Analysis” was conducted. The analysis provides a means of identifying the issues that drive public opinion.

- The first stage involves applying factor analysis to the data set.
  - Factor analysis is used to identify underlying themes (or factors) often contained in large attribute or question sets
  - These factors are created during this analysis in order to group statistically and conceptually common attributes together to simplify the analysis of the data and the implementation of findings.
  - Each attribute within a factor is given a weight to indicate the amount of influence each individual attribute has on the overall factor.
  - In this analysis, four factors were created for each product (see details on the following pages).
- The second step is to utilize regression.
  - The objective here is to identify the impact that key drivers contribute to a specific outcome, in this case, favorability toward tourism.
  - Multiple regression was used, in this case, to then calculate the amount of impact a factor has on changing favorability.
- The results of this analysis will allow Guam Visitors Bureau (GVB) to focus on the specific areas that have the greatest impact on favorability toward tourism.



# Factor #1: Creates Jobs and Opportunities

67

- Eight measures correlated to create the first factor. “Creates Jobs and Opportunities.” Creates Jobs and Opportunities represent the measures of attitudes about new jobs, new businesses, and new activities or attractions that are statistically correlated.
- The percentages reported represent the contribution or weight that each measure constitutes within the factor.



*Due to rounding, percentages might not add up to 100%*

- Similarly four measure were sufficiently correlated to create the “Chamorro Culture” factor.



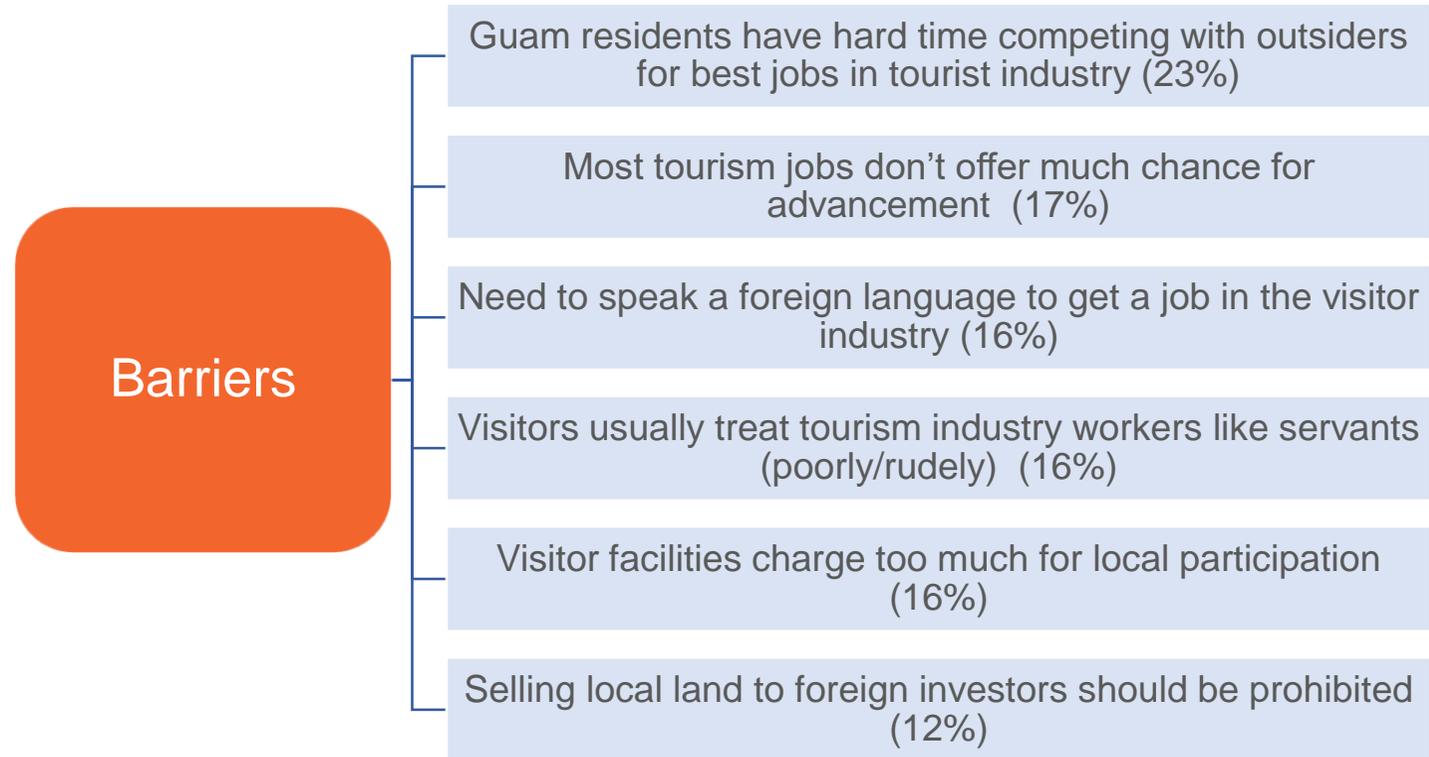
*Due to rounding, percentages might not add up to 100%*

- There were 10 measures that were correlated and formed the “Salaries and Investments” Factor.



*Due to rounding, percentages might not add up to 100%*

- Finally, 6 measures were sufficiently correlated to create the final factor that could be ascertained, called barriers.



*Due to rounding, percentages might not add up to 100%*

- Results of the drivers analysis show the unusually strong impact (82%) of one factor, Creates Jobs & Opportunities, on overall favorability toward tourism. This factor covers basic job creation, as well as the more social aspects of a tourism economy (i.e. retail, dining, festivals, sports events, parks).
- The next most impactful factor is related to Chamorro culture (16%), with an emphasis on preserving Chamorro culture and language and encouraging visitors to be respectful of the culture and the environment.
- It must be noted that the regression analysis indicated a very low adjusted R-square (.20), meaning that the regression model accounts for 20% of the variability in attitudes toward tourism. While this is low, it does not necessarily suggest low confidence in the model, as this may be caused by a number of conditions. Given the strength of the Creates Jobs & Opportunities factor, strategies based on the items in this factor are well advised.