



GUAM VISITORS BUREAU
Survey of Tourism Attitudes of Residents of Guam
STAR STUDY
JULY 2010



Prepared by: QMark Research

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Background & Methodology

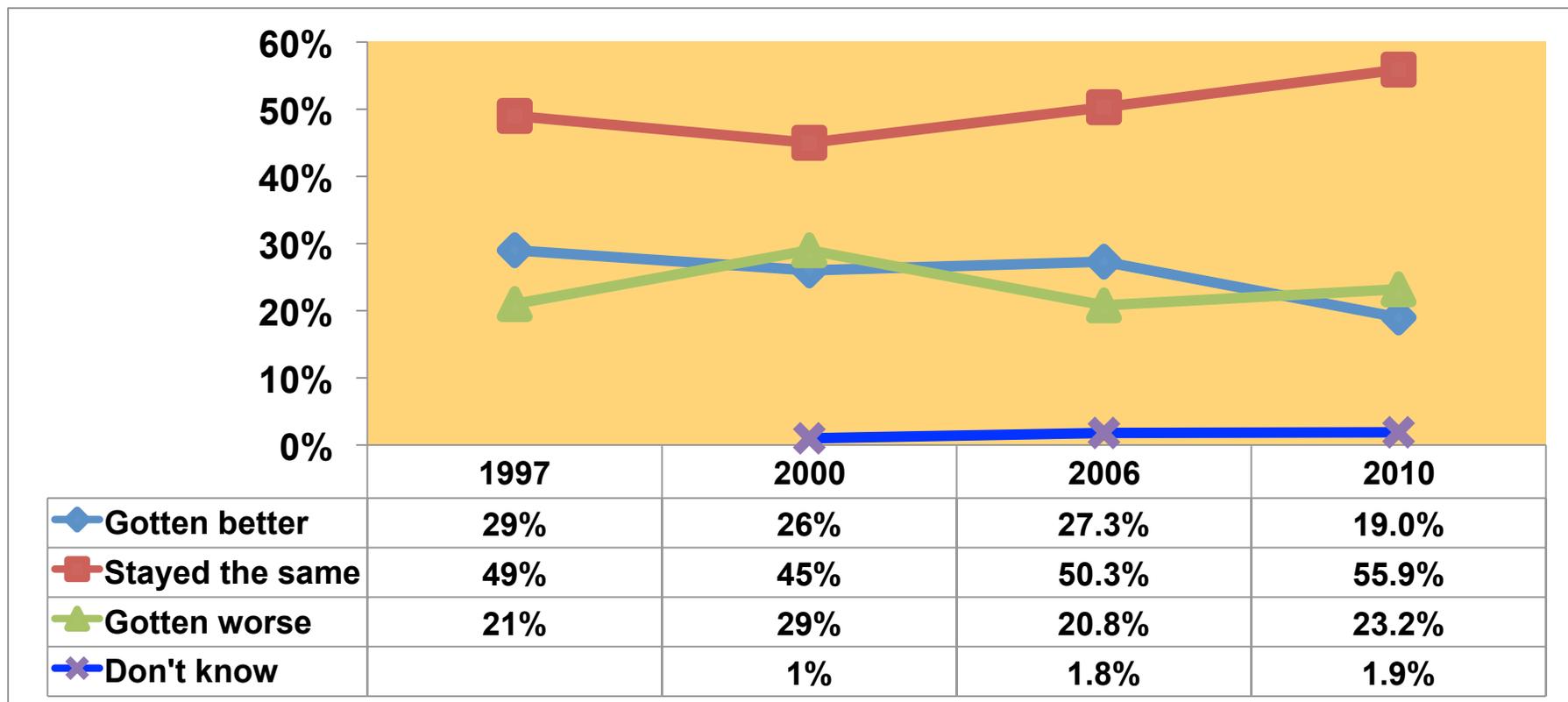
- The fieldwork began on June 7, 2010 and was completed on June 24, 2010. Quantitative telephone methodology was used for this research. The sample was derived using QMark's proprietary Random Digit Dialing software.
- Respondents were randomly called and screened to ensure they were 18 years or older and residents of Guam to qualify for the survey.
- A stratified random sample of 1,200 residents on the island of Guam were completed for this study. The samples were collected in correlation (by north, central, south) with the Bureau of Statistics & Plans 2008 Guam Statistical Yearbook.
- A sample of this size has a margin of error of +/- 2.83 percentage points with a 95% confidence level.

Objectives

To work with the GVB Research Department to clarify and specify the information objectives with regards to collecting quantitative data by regions (north/central/south) to assist with:

- Promoting Guam's visitor industry,
- Promoting local interest and participation at all levels of the visitor industry,
- Development, implementation and promotion of programs to further education, training, employment assistance and entrepreneurial development, and
- Promoting development of adequate tourist and resident facilities and attractions.

In the last year has your standard of living...



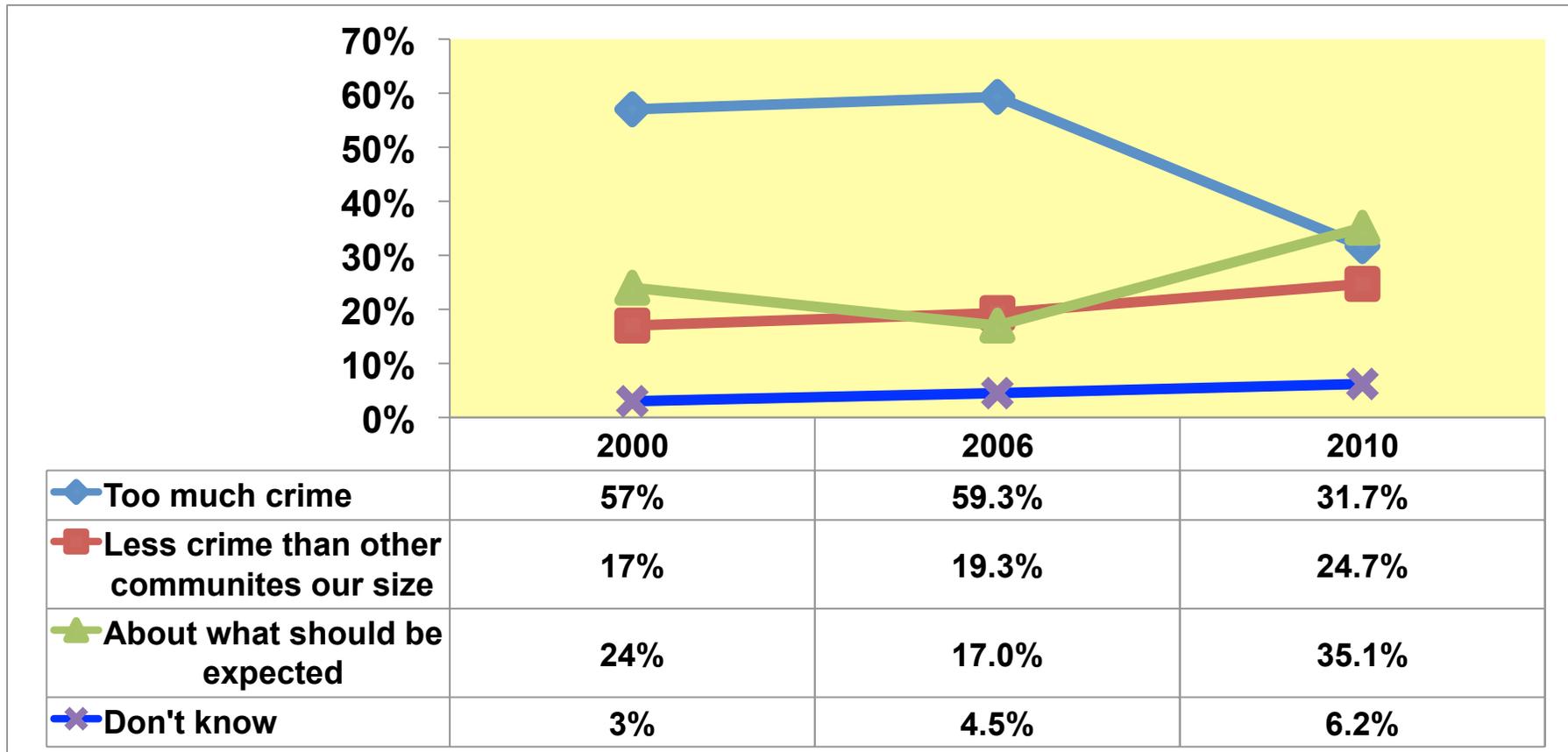
In the last year has your standard of living...

Overall, roughly one in five (**19.0%**) Guam residents believe their current standard of living has improved. Half (**55.9%**) do not recognize any change in this area, while **23.2%** are of the opinion they are worse off as far as their standard of living is concerned.

• Younger segments of the sample react more positively when this question is posed to them. For example, among residents between the ages of 18 and 34, 25.6% believe their standard of living has improved. By comparison, this number (gotten better) falls to 14.8% among those residents over the age of 55.

When the results are tracked, we find fewer Guam residents who believe their standard of living has gotten better.

Understanding that all communities have crime to some degree, do you think Guam has...



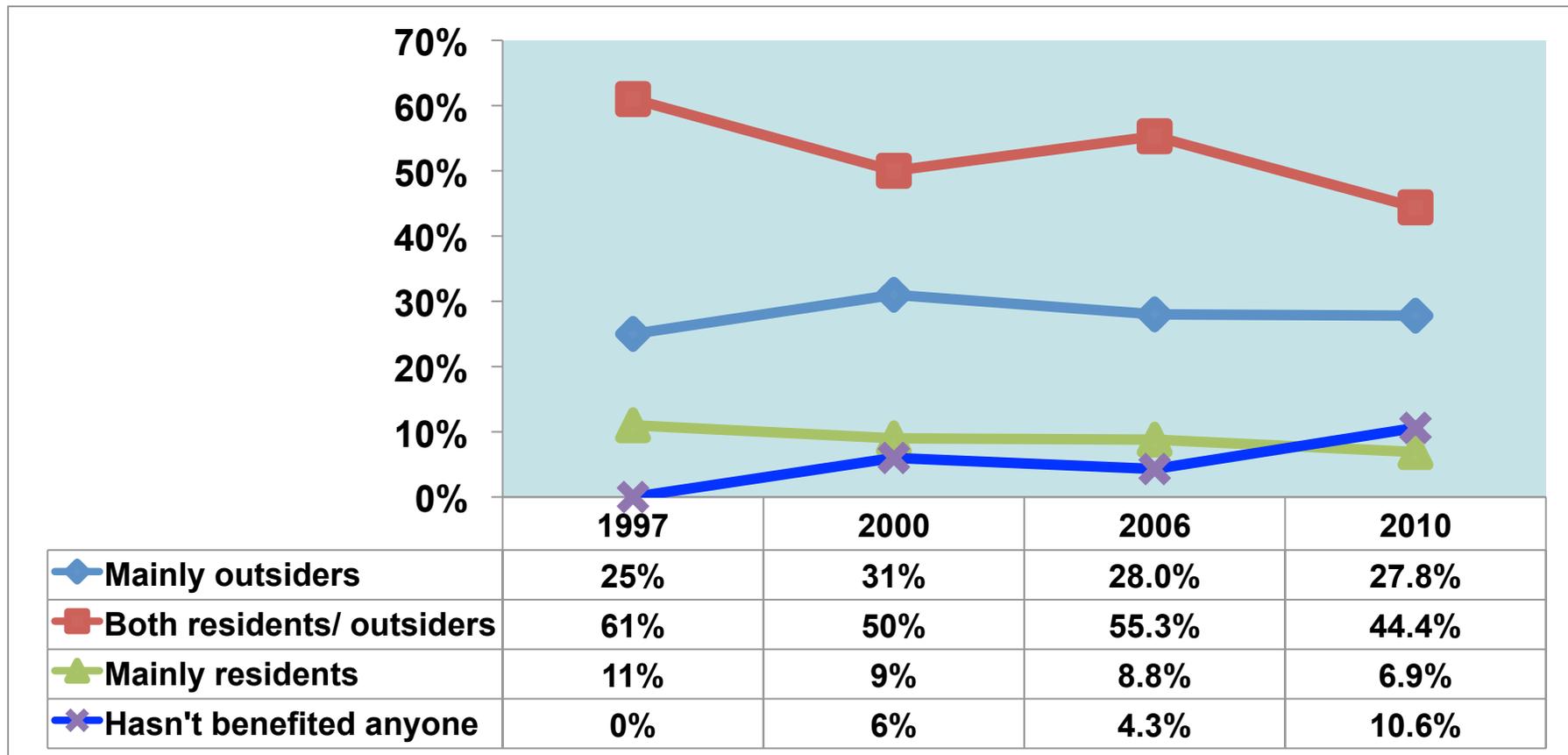
Understanding that all communities have crime to some degree, do you think Guam has ...

Roughly a third (31.7%) of those polled believe Guam has too much crime. One in four (24.7%) think Guam actually has less crime than other communities of similar size while the remainder (35.1%) thinks the crime rate is about what it should be.

•Older respondents are more inclined to be of the opinion that Guam has too much crime. For example, 37.2% of those over the age of 55 believe there is too much crime of Guam. This number (too much crime) drops to 32.8% among those between the ages of 35 and 54 and bottoms out at 24.8% among respondents under the age of 35.

When the results are tracked we find the proportion of Guam residents who feel there is too much crime on the island dropping 27.6 percentage-points from the last reporting period. This drop is offset primarily by those who now feel the crime rate is roughly where it should be.

Do you think the economic growth of Guam has benefited...



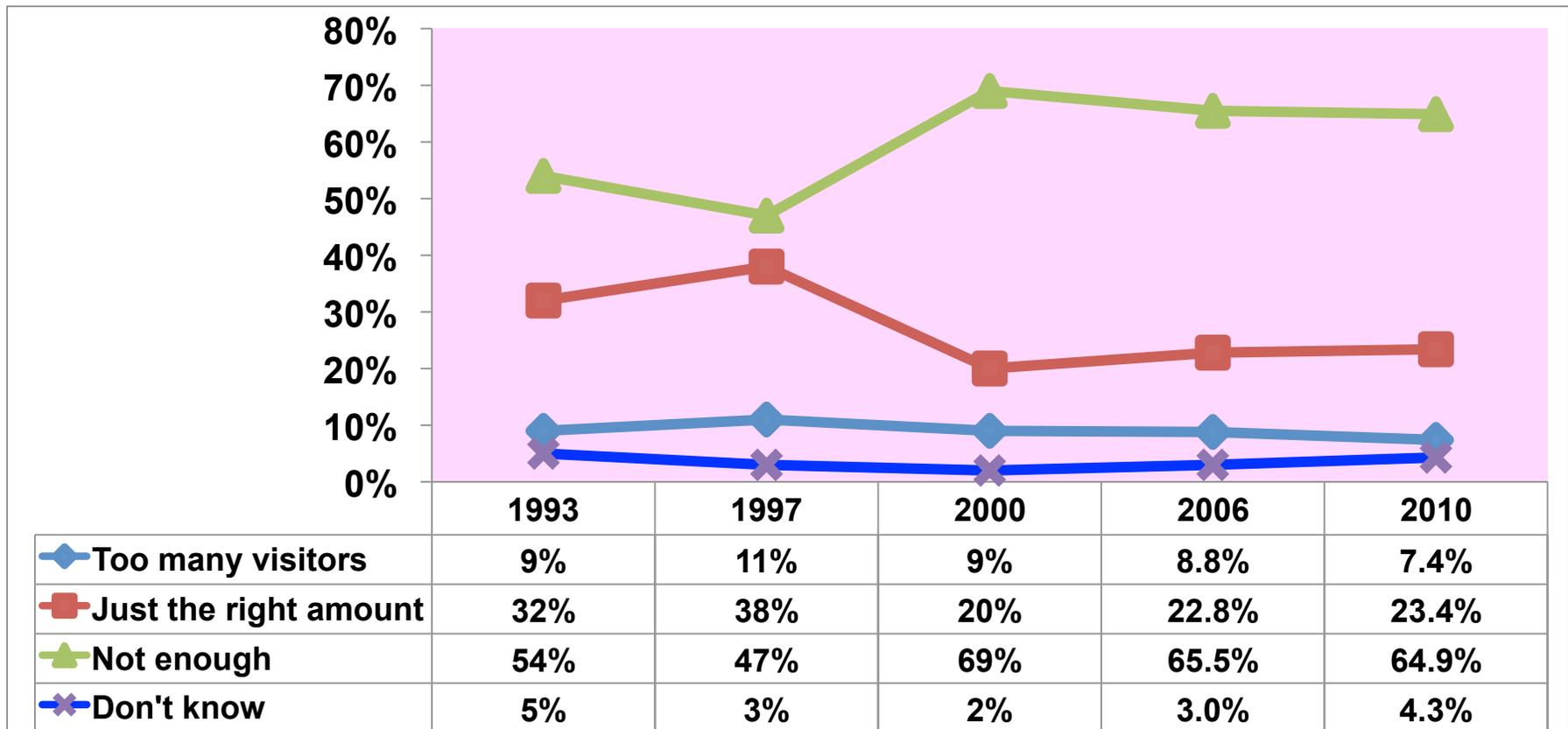
Do you think the economic growth of Guam has benefited...

The results show 27.8% believe the economic growth on Guam has benefited primarily outsiders while just 6.9% think mainly residents have benefited economically. Of the remainder, a plurality (44.4%) thinks both outsiders and residents have benefited equally, while 10.6% are of the opinion that no one has benefited.

•A third (33.8%) of the Chamorros polled think that mainly outsiders have benefited from Guam's economic growth. As a point of comparison, the number of Filipinos who feel the same (mainly outsiders have benefited) is just 18.9%.

When the results are tracked we find the number of residents who believe no one has benefited, doubles from the most recent reporting period to 10.6%.

How do you feel about the number of visitors coming to Guam each year?



How do you feel about the number of visitors coming to Guam each year?

Overall, 7.4% believe there are currently too many visitors coming to Guam. Roughly one in four (23.4%) think just the right amount of visitors are currently coming to Guam. A majority (64.9%) think that there are not enough visitors coming to Guam.

•Male (72.4% not enough) respondents are more likely to be of the opinion that there are currently not enough visitors coming to Guam, as compared to the opinions of their female (58.4% not enough) counterparts.

•The sentiment that there are not enough visitors currently coming to Guam increases as residents become more affluent. For example, among those currently earning below \$40K/year, 58.9% think that there are not enough visitors coming to Guam. By comparison, this number (not enough visitors) increases to 83.5% among those earning over \$70K/year.

When the results are tracked we find no significant changes from the most recent reporting period.

Military Buildup

	Agree	Disagree	Don't know
Tourism will be affected by the move of more military to Guam	58.3%	36.0%	5.7%
With an increase in the military population on Guam the presence of additional military police in Tumon will be good	83.3%	14.6%	2.1%
Locals should receive the same discounts offered to military personnel and their dependents by the tourism industry	80.9%	14.0%	5.1%

Military Buildup

A little more than half (58.3%) the residents polled believe that tourism will be affected by the increase in military personnel on the island.

• Younger residents are more likely to be of the opinion that tourism will be affected by the military build-up than are their older counterparts. For example, 63.7% of those polled younger than 35 feel that tourism will be affected by the increased military presence. By comparison, this number drops to 53.2% among those over the age of 55.

A solid majority (83.3%) think the additional military police in Tumon is a good thing about the upcoming build-up.

Most (80.9%) local residents feel they should also benefit from the same discounts offered to military personnel by the tourism industry.

• A majority (87.0%) of those who currently work in the visitor industry agree that local residents should also benefit from discounts available to military personnel.

General Attitudes

	1997 “Yes”	2000 “Yes”	2006 “True”	2010 “True”
Salaries and wages are higher in Guam because of tourism	57%	44%	47.5%	25.7%
Local stores or what we sometimes call “mom and pop” stores are getting their fair share of the business created by tourists	59%	52%	36.3%	26.1%
Visitor facilities charge too much for local participation	63%	68%	73.0%	64.4%
When I go to a visitor facility I feel welcome	67%	68%	77.5%	68.8%
Tourism helps to preserve the Chamorro culture	46%	58%	68.0%	61.7%
Tourism improves the ability of local people to control their future	40%	57%	58.0%	53.2%
Without tourism the standard of living on Guam would be much less than it currently is	71%	78%	82.3%	76.9%

General Attitudes

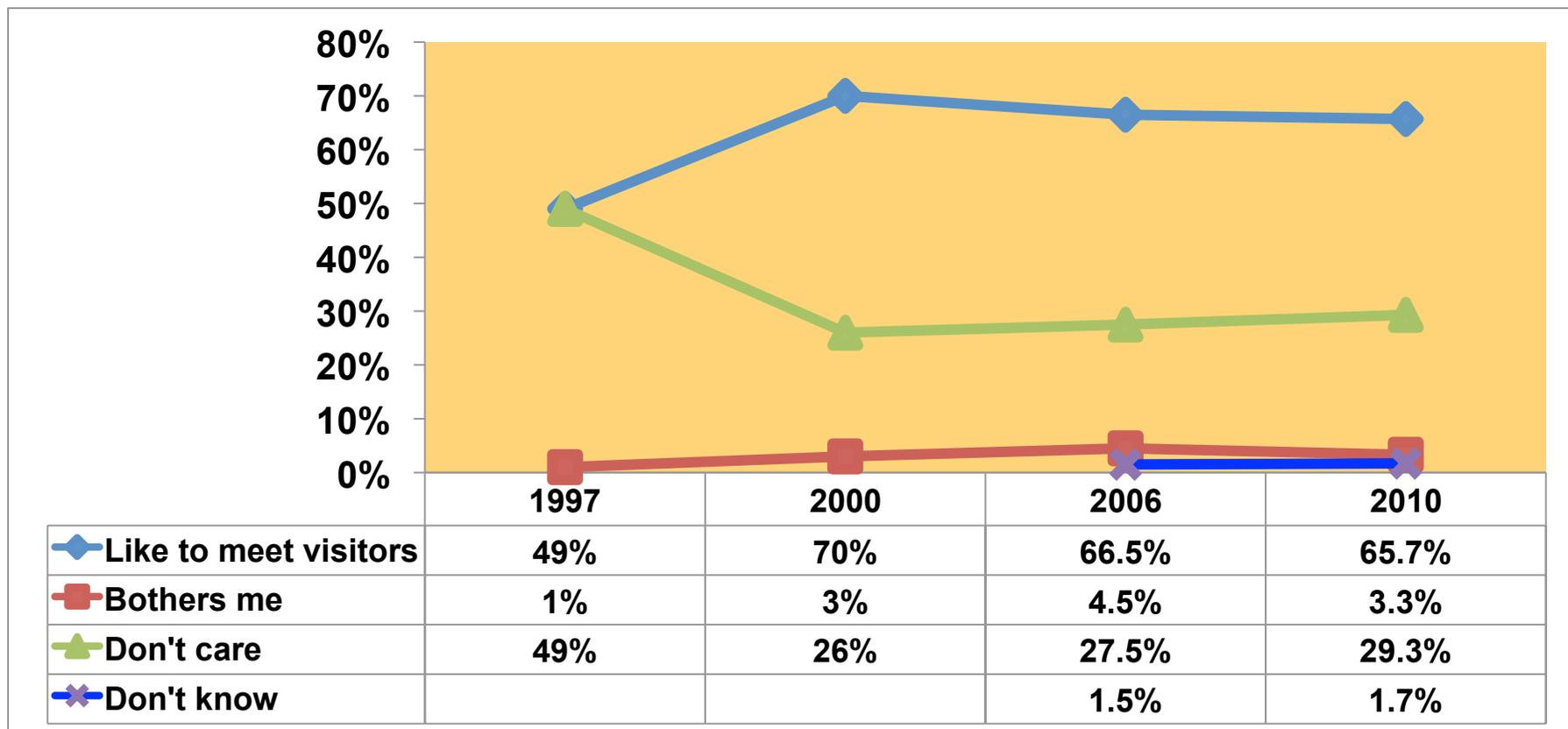
The results show a general decline in the number that believes each of the seven statements being tested is “true.”

The largest drop occurs regarding the statement that wages and salaries on Guam are higher because of tourism. Just 25.7% of those polled believe this is a true statement down 21.8 percentage points from the most recent reporting period.

Also showing a measurable decline are those that think local “mom and pop” stores are getting their fair share of tourism business. Again, just 26.1% of the Guam residents polled believe this is true down from 36.3% in 2006.

•Roughly half (57%) the Chamorros polled believe that tourism helps to preserve their culture.

Do you like to meet tourists when you travel around the island...



Do you like to meet tourists when you travel around the island...

The results show 65.7% of the residents polled like to meet tourists when they are traveling around the island. Just 3.3% say this interaction is bothersome while the remaining 29.3% don't care one way or the other.

When the results are tracked we find the scores remaining relatively unchanged since the last reporting period.

Suppose you had the opportunity to participate in a cultural center or visitor attraction in your village...

	2006	2010
I would like to participate by selling products, performing or demonstrating Guam culture	36.0%	31.8%
I would support the effort as a customer through donations	52.0%	50.6%
I wouldn't really care one way or the other	10.0%	16.5%
Don't know	2.0%	1.1%

Overall, 31.8% of those polled would be interested in being an active participant in a cultural or visitor attraction in their respective village. Half (50.6%) would support such an attraction while the remainder expresses relative indifference.

•Potential active participation is highest in the southern part of the island. For example, 37.1% of those residing in the southern region say they would actively participate in a cultural center or visitor attraction in their village.

When the results are tracked we note a slight decline in support of this idea.

Some people have proposed that adult-oriented entertainment facilities such as strip clubs in Tumon should be relocated as these are offensive to visitors...

	2006	2010
I agree with establishing a zone outside of Tumon for these businesses	42.5%	44.8%
I don't agree with establishing a special zone outside of Tumon for these businesses	40.8%	29.7%
I don't really care one way or the other	12.3%	23.1%
Don't know	4.5%	2.5%

Some people have proposed that adult-oriented entertainment facilities such as strip clubs in Tumon should be relocated as these are offensive to visitors...

The results show opposition to establishing a special zone outside of Tumon for adult-oriented businesses is declining. In the current study, 29.7% oppose the establishment of special zone for these types of businesses down from 40.8% in 2006.

Support for this idea remains relatively constant at 44.8% while the number with no real opinion on this topic has grown to 23.1%, up from 12.3% in 2006.

•Support for the creation of this special zone is higher among visitor industry workers (56.5%) than it is among those not employed (42.9%) in the visitor industry.

•Support for the creation of the adult entertainment special zone increases as residents get older. For example, 48.9% of those 55 years of age and older support the proposed adult-entertainment zone. By comparison, the number that supports this idea drops to 37.8% among those under the age of 35.

•Support for this measure increases as respondents become more affluent. Among those earning below \$40K/year, 41.3% support the proposed adult-oriented entertainment zone. The proportion that support this measure increases to 47.4% among those earning anywhere from \$40K/year to \$70K/year and support tops out at 56.7% among those making in excess of \$70K/year.

General Issue Statements

In this section of the research, respondents were presented with various statements related to the visitor industry and its impact on local residents. After being read each statement respondents were asked whether or not they agreed or disagreed with each. The following section tracks the percent that agreed with each statement.

General Issue Statements

	1997	2000	2006	2010
I feel comfortable visiting hotels and other places where visitors are found	85%	88%	88.5%	93.7%
I enjoy visiting the Tumon area in the evening	83%	86%	84.5%	85.2%

Nearly everyone (93.7%) polled agrees that they feel comfortable visiting hotels and other places where visitors are found. When the results are tracked we find the number that agrees with this statement increasing by 5.2 percentage-points.

Eighty-five percent of those polled agree that they do enjoy visiting the Tumon area in the evening.

General Issue Statements

	2000	2006	2010
My family often enjoys eating out at the hotels	70%	77.8%	75.2%
I get good service when I go to a hotel	87%	86.8%	84.8%
I get good service when I go to a local attraction	90%	89.3%	85.9%
I get good service when I go shopping in Tumon	75%	74.5%	72.1%
I find visitors to Guam to generally be good guests	91%	91.0%	92.8%
Sometimes I wish I had the kind of money most visitors seem to have	72%	71.8%	71.8%
With more and more visitors coming to Guam it is getting harder to feel friendly towards them	23%	22.8%	15.9%
Guam residents are courteous on the roadway when tourists are present	58%	64.8%	58.9%

General Issue Statements

Three in four (75.2%) respondents agree that their family often enjoys eating out at the hotels, virtually unchanged from the most recent reporting period (77.8%).

Eighty-five percent feel they get good service when they go to a hotel, virtually unchanged from the most recent reporting period (86.8%).

A majority (85.9%) agree they usually get good service when they visit a local attraction. When this figure is tracked we note a continuation of a slight downward trend for this question falling from a high of 89% in 2000.

Three in four (72.1%) respondents feel they get good services when shopping in Tumon. When the results are tracked we note no significant changes from the most recent reporting period (74.5%).

General Issue Statements

Nearly everyone (92.8%) polled finds visitors to Guam to be generally good guests, virtually unchanged from the most recent reporting period (91.0%).

Overall, 71.8% of the residents polled wish they had the kind of money visitors to Guam appear to possess. This result is identical to what was recorded in 2006.

•Female (75.0%) respondents are more likely to agree with this statement than are their male (67.9%) counterparts.

Just 15.9% of those polled agree with the statement that it is getting harder to feel friendly towards visitors as more of them are coming Guam. When the results are tracked we find fewer Guam residents who agree with this statement than in the past (22.8%).

•When the results are segmented by age we find younger residents more inclined to agree that it is getting harder to feel friendly towards visitors. For example, 20.7% of Guam residents under the age of 35 agree that it is getting harder to feel friendly towards visitors. As a point of comparison, the number of 35 to 54 year olds who feel the same is 13.5%.

General Issue Statements

A little more than half (58.9%) the residents polled agree that Guam residents are courteous on the roadway in the presence of visitors. When these results are tracked we find the number that agrees with this statement down from 64.8% in the most recent study.

•Those who reside in the northern (63.4%) part of the island are more inclined to agree with this statement than are those living in the southern (53.4%) part of the island.

General Issue Statements

	1997	2000	2006	2010
I feel that I, as well as all local residents have a responsibility to make visitors feel welcome	93%	94%	94.3%	94.2%
Visitors driving on local roads create a serious safety problem	44%	49%	50.8%	42.0%

General Issue Statements

Nearly everyone (94.2%) polled believes that members of the community have a responsibility to make visitors feel welcome, basically unchanged from the most recent reporting period (94.3%).

Forty-two percent are in agreement that visitors driving on local roads create a serious safety problem. When this figure is tracked we note a drop of roughly eight percentage-points from the most recent study (50.8%).

•Younger residents are more inclined to believe that visitors are causing safety problems on the roads in Guam. For example, 49.6% of the residents under the age of 35 agree this is a concern for them. By comparison, the number that agrees with this statement drops to 36.3% among respondents over the age of 55.

•Female (46.0%) respondents are more likely to agree that visitors create additional road hazards than do their male (37.3%) counterparts.

Visitor Industry Employment

	1997	2000	2006	2010
Most visitor industry jobs pay pretty well	49%	58%	59.5%	46.5%
People of Guam have a hard time competing with outsiders for the best jobs in the visitor industry	56%	65%	64.0%	54.7%
Employment benefits are better in the visitor industry	36%	40%	50.0%	34.2%
Visitors treat tourism workers like servants meaning poorly or rudely in a demeaning manner	31%	23%	29.8%	20.8%
Most industry managers are people from Guam these days	28%	34%	39.0%	37.5%
Most tourism jobs don't offer much chance for advancement	39%	48%	49.3%	48.5%
People wanting to be visitor industry managers can get good training on Guam	61%	66%	77.5%	67.8%
You have to speak a foreign language to get a job in the visitor industry	62%	68%	73.5%	64.0%

Visitor Industry Employment

A little less than half (46.5%) of those polled are in agreement that visitor industry positions pay well. When the results are tracked we find a measurable decline from the most recent reporting period when 59.5% agreed with this statement.

• Respondents who say they work in the visitor industry are split evenly (46.0% agree/ 46.6% disagree) when it comes to their perception of industry compensation practices.

• The belief that visitor industry jobs pay well declines as respondents become more affluent. For example, among those in the bottom income tier (below \$40K/year), 55.0% agree that positions in the visitor industry pay well. By comparison, the percent that agrees with this statement among those earning in excess of \$70K/year drops to just 28.0%.

A little more than half (54.7%) of those taking part in the study agree that Guam residents have a hard time competing for the best jobs in the visitor industry. When these results are tracked we find a drop of roughly ten percentage-points from the results obtained in 2006 (64.0%).

• Nearly two-thirds (60.2%) of those currently employed in the visitor industry agree that Guam residents have a harder time competing for the top jobs in the local visitor industry.

Visitor Industry Employment

The results show a third (34.2%) of those polled believe that benefits given to those in the visitor industry are better than other local industries. When the results are tracked we find a sizeable drop in the number which agrees with this sentiment falling from 50.0% in 2006.

•Those who are currently employed in the visitor industry (43.0% agree benefits are better) are more likely to believe their benefit package is better than most jobs as compared to the perception among other residents have who are not employed in the visitor industry (32.7% agree).

Roughly one in five (20.8%) respondents agree with the sentiment that visitors are generally rude and treat visitor industry personnel poorly. When the results from this section are tracked we find a drop in the number who still feels this way falling from 29.8% in 2006.

•The results show one in four (26.1%) visitor industry personnel agree with the statement that visitors generally treat tourism workers like servants.

Just a third (37.5%) of the respondents polled believe that most industry managers hail from Guam. When the results are tracked we find this perception has not changed much since 2006 (39.0%).

Visitor Industry Employment

Half (48.5%) are of the opinion that most of the jobs in the visitor industry do not offer much chance for professional advancement. This sentiment has remained relatively steady when compared to the most recent reporting period in 2006 (49.3%).

•A little more than half (54.0%) of those currently working in the visitor industry agree that a majority of the jobs in the field hold little chance for professional advancement.

The results show two-thirds (67.8%) of the Guam residents polled agree with the statement that people wanting to be managers in the visitor industry can get good training here on Guam. When the results are tracked we find the number that agrees with this statement dropping 10 percentage-points from 77.5% back in 2006.

Sixty-four percent of those polled believe you need to speak a foreign language to get a job in the visitor industry down from 73.5% in 2006.

Economic Development

	1997	2000	2006	2010
Selling local land to foreign investors should be prohibited	51%	60%	60.0%	53.1%
Local government is doing enough to promote local business participation in tourism	44%	45%	40.5%	39.9%
We should do more to promote the development of golf courses	36%	32%	51.8%	41.0%
Hagatna Bay should be developed like Tumon Bay	NA	67%	60.8%	47.7%
Tumon is overcrowded and over-developed	NA	67%	67.3%	64.2%
I wish there were more visitor facilities in my village	58%	72%	66.3%	58.8%

Economic Development

A little more than half (53.1%) supports the idea that selling local land to foreign investors should be prohibited. This marks a seven-point decline from 60% who agreed with this sentiment in 2006.

•Opposition to the sale of local land to foreign investors is especially strong among Chamorros where 64.8% of this ethnic segment agrees with this statement.

Overall, 39.9% of those polled agree that the local government is doing enough to promote local business participation in tourism, virtually unchanged from 2006 (40.5%).

•A majority (60.9%) of those currently working in the visitor industry disagrees with this statement that the local government is doing enough to promote local business participation in the tourism industry.

Two in five (41.0%) persons polled believe that more should be done to promote the development of golf courses on the island. Agreement on this issue has dropped roughly ten-points since 2006 (51.8%).

•Support for golf course development declines as residents become more affluent. Among those earning below \$40K/year, 47.9% agree more should be done to promote golf course development on Guam. This number (agree) drops to 34.4% among those earning between \$40K/year and \$70K/year and bottoms out at 28.7% among those in the upper income tier (\$70K+/year).

Economic Development

A little less than half (47.7%) of Guam residents polled agree that Hagatna Bay should be developed like Tumon Bay. This marks a sharp 13 percentage-point decline from the most recent study in 2006 (60.8%).

- *Those currently working in the tourism industry (56.5% agree) are more inclined to support the development of Hagatna Bay than are those who do not work in the visitor industry (46.3%).*
- *Respondents who reside in the southern part of the island are the least likely to support further development of Hagatna Bay.*

A majority (64.2%) of Guam residents are of the opinion that Tumon is overcrowded and overdeveloped. When the results are tracked we note no significant movement from the most recent study (67.3%) in 2006.

- *Chamorros (72.4%) in particular agree that Tumon is overdeveloped.*

The results show that 58.8% wish that there were more visitor facilities in their respective villages. This marks a steady decline in this number dating back from the year 2000 when 72% longed for more visitor facilities close by.

Government Policy

	1997	2000	2006	2010
Asian languages should be taught in the public schools	57%	66%	64.3%	62.9%
Guam is doing a good job in maintaining the beaches at Tumon and Hagatna Bays	43%	54%	47.8%	54.5%
Guam is doing a good job maintaining public bathrooms and facilities at scenic attractions around the island	NA	27%	17%	31.2%

Government Policy

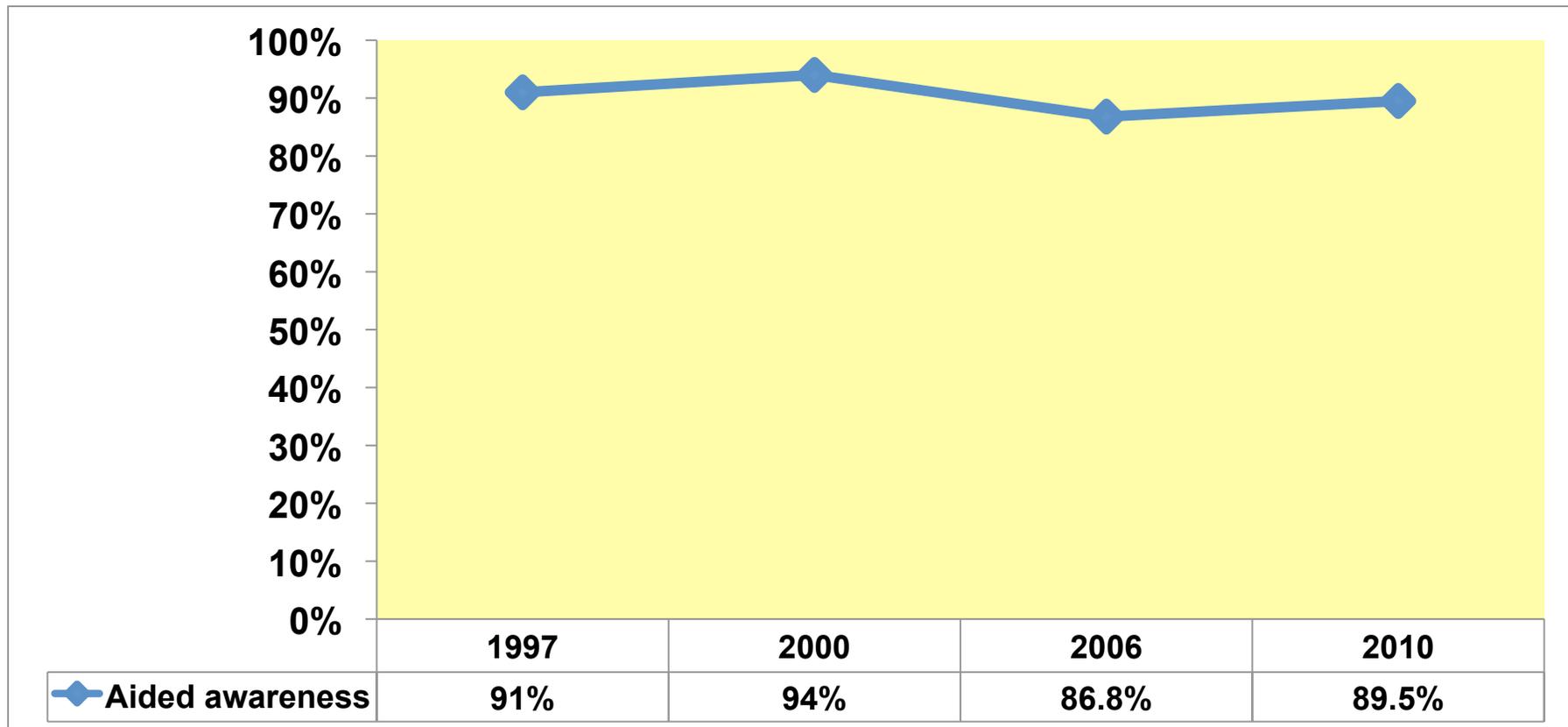
Roughly two-thirds (62.9%) of those polled support the idea of “Asian” languages being taught in the public school system, virtually unchanged from the most recent reporting period (64.3%).

A little more than half (54.5%) the respondents polled agree that Guam is doing a good job in maintaining the beaches at Tumon and Hagatna Bays. When the results are tracked we find the number who agree with this statement increasing from the 47.8% recorded in the most recent study.

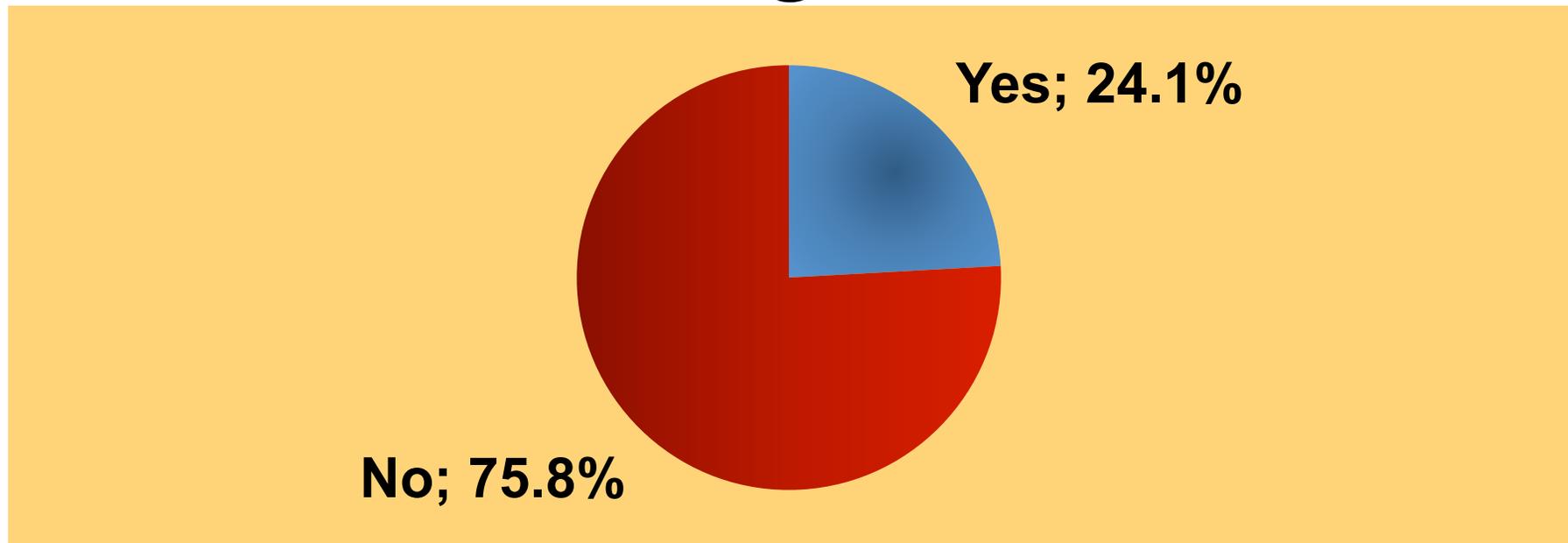
The research shows just 31.2% believe that Guam is doing a good job maintaining public bathrooms and facilities at scenic attractions around the island. This marks a relatively large increase in this number from the 17% who agreed with this statement in 2006.

•Less affluent respondents are more inclined to agree that Guam is doing a good job of maintaining the public bathrooms and facilities at scenic locations than are their more affluent counterparts. As an example, among those in the bottom income tier (<\$40K/year), 36.1% believe Guam is doing a good job in this area. By comparison, among those earning over \$70K/year, just 20.1% agree that Guam is doing a good job.

Have you heard of the Guam Visitors Bureau?

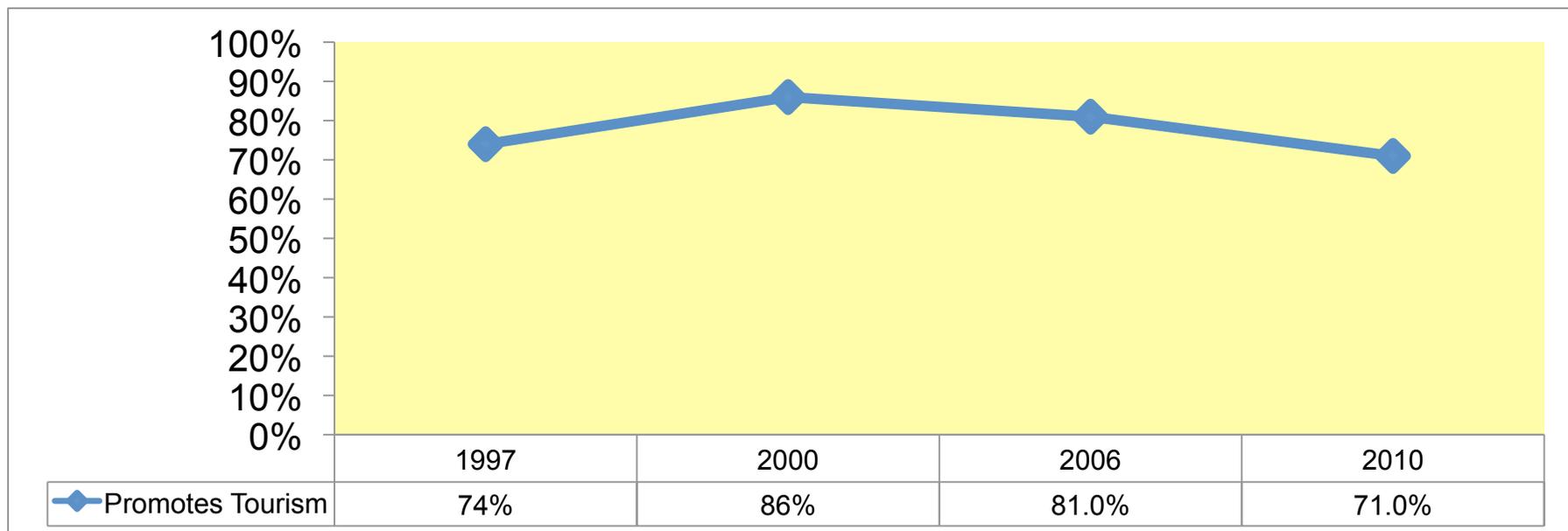


Have you ever visited GVB's website, www.visitguam.com?



•The likelihood one has visited GVB's website increases as respondents become more affluent. For example, just 16.0% of those earning less than \$40K/year have visited this website. By comparison, the number of respondents who have visited this website increases to 43.9% among those who earn in excess of \$70K/year.

What do you think GVB does?



A majority (71.0%) still recognize the primary mission of GVB as being to “promote tourism.” It should be noted however, that the number that volunteers this response is on the decline falling from 81.0% in 2006 to 71.0% in the current study.

Do you feel GVB is doing a good job at what it does?

	2006	2010
Good job	44%	47.0%
Bad Job	18%	9.9%
Neither a good nor a bad job	33%	24.8%

A little less than half (47.0%) the respondents polled agree that the Guam Visitors Bureau is doing a good job. Just one in ten (9.9%) feels that the Bureau is doing a bad job while one in four (24.8%) have no opinion on the subject.

Role of GVB

	2006	2010
GVB should put most of their efforts into marketing Guam in Asian countries	69.5%	68.6%
GVB does put more effort into improving Guam as a tourism destination	79.0%	68.4%
GVB does work with the village mayors to bring more tourists to my village	70.0%	37.7%
GVB does work to get more community involvement in the visitor industry	79.0%	51.3%
GVB does work more to help preserve local culture	81.8%	62.8%
GVB should “police” the industry to make sure that tourists don’t get ripped off	79.0%	79.8%

Role of GVB

Overall, 68.6% are in agreement that GVB should focus their marketing efforts in Asia, virtually unchanged from the most recent reporting period in 2006 (69.5%).

Two-thirds (68.4%) of those polled are of the opinion that GVB needs to put more of an emphasis on improving Guam as a tourist destination. When this figure is tracked we find fewer and fewer residents that share this opinion over time as evidenced by the drop from 79.0% in 2006 to the current level.

Just a third (37.7%) of the residents polled think that GVB works with village mayors to bring more tourists to their area. This marks a substantial drop from the 70% who agreed with this statement in 2006.

•Older residents tend to agree more with the idea that GVB is working with village mayors than do younger respondents. For example, among those over the age of 55, 47.1% agree that GVB works with village mayors. By comparison, just 31.7% of those under the age of 35 feel the same.

Role of GVB

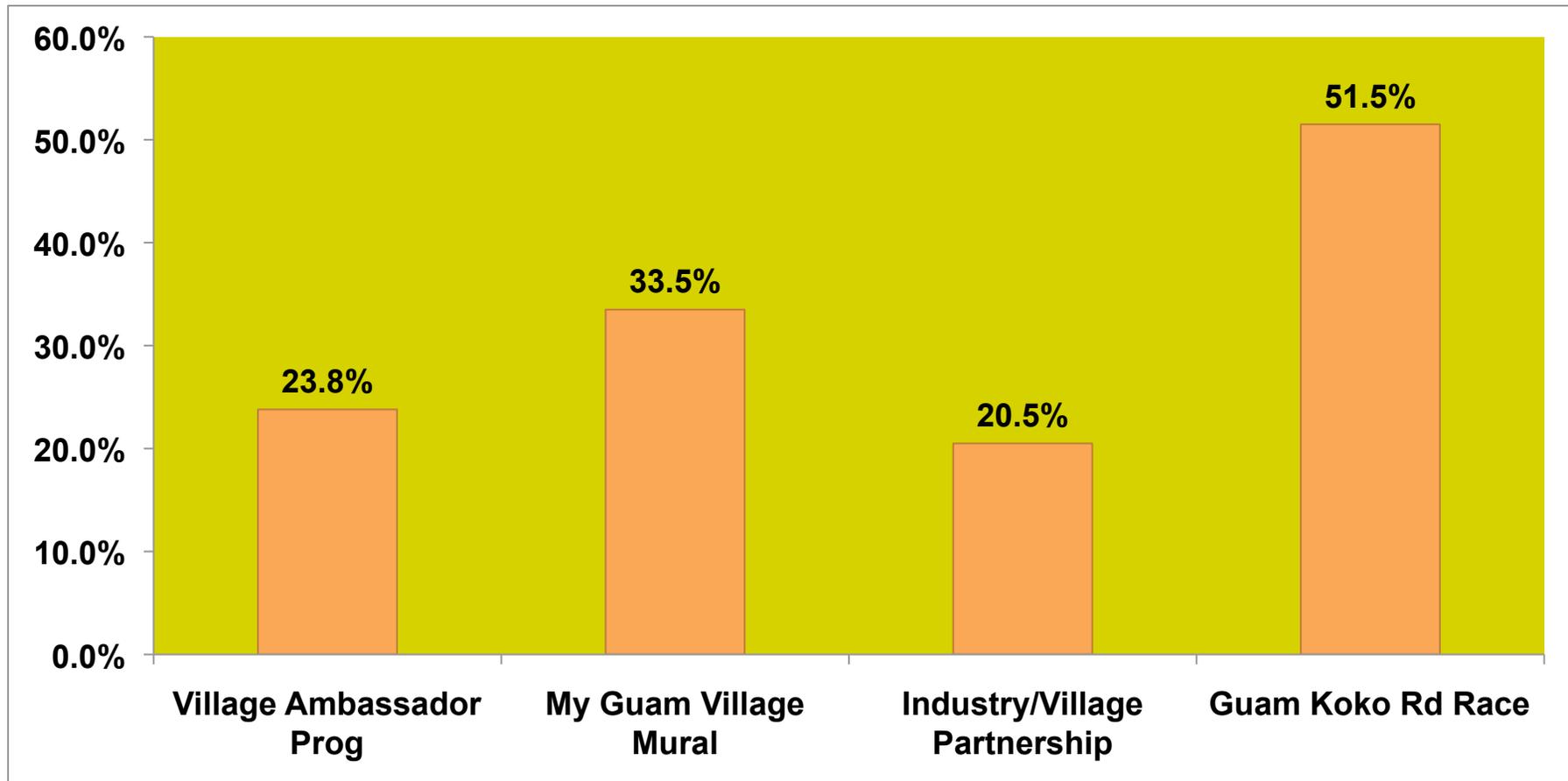
The research indicates half (51.3%) of the sample agrees that GVB works to get the community involved in the visitor industry. When the results are tracked we note a sharp decline in this measurement from 2006 when 79.0% agreed with this statement.

Overall, 62.8% agree that GVB works more to help preserve the local culture. When this figure is compared to 2006 we find a sharp decline in the number who agrees with this statement falling from 81.8%.

- *Two-thirds (65.0%) of the Chamorros polled agree that GVB does work more to help preserve local culture.*

The results show 79.8% of those polled believe one of the roles of GVB should be to help insure that tourists are treated fairly on Guam. When the results are tracked we note no significant changes from 2006 (79.0%).

“We Are Guam” – Aided Awareness



“We Are Guam” – Aided Awareness

The “We Are Guam” brand initiative with the highest level of awareness/familiarity is the Koko Road Race (51.5%). Ranking a distant second in this measurement is the “My Guam Village Mural” with awareness among 33.5%. The Village Ambassador Program has awareness among 23.8% followed by industry/village partnerships at 20.5% aided awareness

•Familiarity with the Koko Road Race is highest among those residing in the southern (59.3%) part of the island and lowest among those who live in the northern (46.3%) regions of Guam. Awareness of this initiative is also much higher among visitor industry (64.0%) personnel compared to those who do not work in the industry (49.6%).

•Awareness of the Village Mural Program increases as respondents get older. For example, awareness among those under 35 is 23.3%. By comparison, awareness rises to 40.3% among those over 55.

Tourism Perceptions

	2006	2010
I am enthusiastic when I see “We Are Guam” signature logo	NA	69.5%
In general, I like the changes brought about by tourism development in Guam	84.5%	75.1%
I support new tourism development in Guam	90.5%	88.9%
I attach great importance to having tourism in Guam	91.5%	91.3%
Having tourism is like a blessing to Guam because of the benefits it provides	90.8%	87.9%
I believe the benefits of tourism in Guam outweigh the costs	74.3%	64.8%
I reschedule my activities to escape the crowds at Tumon during peak tourist periods	45.3%	40.2%

Tourism Perceptions

A majority (69.5%) of the Guam residents polled are enthusiastic when they see the “We Are Guam” signature logo.

- *Chamorros (75.0%) in particular express enthusiasm for this campaign.*

The results show three in four (75.1%) respondents like the changes resulting from tourism development on Guam. When this figure is tracked we note a measurable decline in the number who agrees with this sentiment down from 84.5% in 2006.

A solid majority (88.9%) of those polled is in agreement in support of new tourism development on Guam, virtually unchanged from 2006 (90.5%).

Nine in ten (91.3%) residents place a great deal of importance on the local tourism industry, unchanged from four years ago (91.5%).

Nearly everyone (87.9%) polled is of the opinion that tourism on Guam is truly a blessing based on all it provides to the island. When the results are tracked we note no significant changes from the most recent reporting period (90.8%).

Tourism Perceptions

Two-thirds (64.8%) are of the opinion that the benefits of tourism outweigh any potential costs to the island. When the results are compared to four years ago we find a drop of ten percentage-points from 74.3% in 2006.

- *One in four (27.9%) Chamorros disagree with this statement.*

The results show two in five (40.2%) residents typically avoid going into Tumon during the peak tourist season. When the results are tracked we find slightly fewer residents avoiding Tumon due to tourists than was the case in 2006 (45.3%).

Tourism Perceptions

	2006	2010
Most people don't care one way or the other about tourism	64.8%	46.1%
The community needs to be more involved in Guam's tourism	88.8%	88.1%
Many residents feel somewhat detached or not part of the tourism industry	80.0%	78.8%
There is not much contact or interaction between tourists and residents	81.0%	78.9%
There should be more government efforts to boost tourism	87.0%	85.1%

Tourism Perceptions

A little less than half (46.1%) of those polled are of the opinion that most people on Guam don't really care about tourism. When this figure is tracked we find much fewer people who believe this is true in the current study compared to four years ago (64.8%).

•Less affluent residents are more inclined to believe that most people don't care about tourism. For example, among residents earning below \$40K/year, 55% are of the opinion that most individuals do not care about tourism. By comparison, the number that believes this is true drops to 36.6% among those earning in excess of \$70K/year.

A majority (88.1%) of those polled is in agreement that there needs to be more community involvement in Guam's tourism industry, unchanged from four years ago (88.8%).

Three in four (78.8%) residents believe the community in general does not really feel like they are a part of the local tourism industry. When the results are tracked we note no significant changes from 2006 (80.0%).

Tourism Perceptions

Most (78.9%) residents are of the opinion that there is not much interaction between tourists and local residents. When the results are tracked we note no significant changes from 2006 (81.0%).

The prevailing sentiment (85.1%) among Guam residents is that the government should be doing more to boost tourism. When the results are tracked we note no significant changes from 2006 (87.0%).

•Chamorro (84.9%) and Filipino (90.8%) residents in particular believe the government should be doing more to boost tourism. As a point of comparison, the percentage that agrees with this sentiment among the other ethnicities on the island is 77.7%

Tourism Perceptions

	2006	2010
Boosting tourism should be the responsibility of the businesses that benefit	66.5%	72.8%
I would like to see more facilities and promotions in my village to bring in members of the U.S. military	65.5%	59.8%
A zone for adult-oriented entertainment facilities should be established close to the military bases	32.3%	34.0%
I would not mind having adult-oriented entertainment facilities in my village if they were properly managed and controlled	38.5%	43.8%

Tourism Perceptions

The results show nearly three in four (72.8%) residents are of the opinion that the promotion of tourism on Guam should be shouldered more by the businesses that directly benefit from it. Agreement with this sentiment is rising, increasing from 66.5% that was recorded four years ago.

A little more than half (59.8%) of those polled would like to see more of an emphasis on attracting military personnel to their respective village. When the results for this question are tracked we find fewer Guam residents who feel this way compared to 2006 (65.5%).

Tourism Perceptions

A third (34.0%) of those polled support the idea of the creation of a zone for adult-oriented businesses near the military bases. When the results are tracked we note no significant changes from 2006 (32.3%).

•Support for this concept declines somewhat as respondents become more affluent. Among those earning less than \$40K/year, 37.8% support the creation of this adult-entertainment zone. By comparison, the number that supports this concept declines to 28.7% among those who earn in excess of \$70K/year.

Overall, 43.8% would support an adult-oriented entertainment zone in their village if it were properly managed up from 38.5% in 2006.

•Those who live in the Northern (48.7%) part of the island are more open to adult-entertainment establishments than are those who live in the Central (38.6%) region of the island.

Survey Sample Profile

Gender

	1997	2000	2006	2010
Male	53%	50%	44.5%	46.3%
Female	47%	50%	55.5%	53.8%

Survey Sample Profile

Ethnicity

	1997	2000	2006	2010
Chamorro	45%	52%	49.5%	48.1%
Filipino	24%	26%	28.8%	29.1%
Caucasian	14%	11%	6.3%	8.8%
Other	17%	10%	14.8%	12.6%
Refused	2%	1%	.8%	1.5%

Survey Sample Profile

Personal Income

	1997	2000	2006	2010
Less than \$20,000	9%	19%	23.0%	21.8%
\$20,000 but less than \$40,000	20%	32%	25.3%	28.7%
\$40,000 but less than \$50,000	9%	15%	10.5%	12.8%
\$50,000 but less than \$70,000	13%	11%	6.0%	11.5%
\$70,000 and above	21%	13%	8.8%	13.7%
Don't know/ Refused	29%	10%	26.5%	11.6%

Survey Sample Profile

Age

	1997	2000	2006	2010
18 – 24	16%	19%	22.5%	15.0%
25 – 34	27%	28%	19.5%	13.9%
35 – 44	24%	24%	20.0%	21.7%
45 - 54	18%	17%	16.5%	22.0%
55 – 64	10%	8%	9.8%	16.9%
65+	6%	5%	10.8%	10.2%
Don't know/ Refused	NA	1%	1.0%	.3%

Survey Sample Profile

Residency

	2000	2006	2010
U.S. citizen	87%	87.0%	85.4%
Permanent resident	12%	11.0%	12.4%
Other	1%	1.3%	1.8%
Refused	0%	.8%	.4%

Survey Sample Profile Area

	2000	2006	2010
North	42%	41.1%	41.3%
Central	34%	37.8%	39.5%
South	21%	21.0%	18.4%
Refused	3%	.5%	.8%

Survey Sample Profile

Household Size

	2010
MEAN - Average	4.13
MEDIAN - Midpoint	4
MIN - Smallest household	1
MAX - Largest Household	20

Survey Sample Profile

Employment Status

	2000	2006	2010
Employed	68%	53.0%	64.7%
Not employed	33%	46.0%	35.1%
Refused	0%	1.0%	.3%

Survey Sample Profile

Employment Sector

	2006	2010
GovGuam	14.3%	15.7%
Federal Government	7.0%	9.3%
Private company	31.3%	39.6%
Refused	1.5%	.2%
Not employed	46.0%	35.3%

Survey Sample Profile

Employment Tourism Industry

	2006	2010
No	36.3%	51.3%
Primary job in tourism	14.3%	12.2%
Secondary job in tourism	.5%	1.3%
Refused	2.8%	-
Not employed	46.0%	35.3%

Survey Sample Profile

Contact with Visitors

	2006	2010
No/ Not employed	85.1%	89.8%
Yes	13.5%	10.3%
Refused	1.5%	-

Survey Sample Profile

Have you or anybody in your household ever held a job in the visitor industry on Guam?

	2000	2006	2010
Yes	31%	34.5%	46.3%
No	66%	45.0%	52.8%
Refused	3%	20.6%	.9%