



GUAM

Survey of Tourism Attitudes of Residents 2019

Prepared by Market Research & Development, Inc.

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Project Overview

In January of 2017, the Guam Visitors Bureau (GVB) contracted Market Research & Development, Inc. (MR&D) to conduct three Survey of Tourism Attitudes among Residents (STAR) surveys. The first was conducted in 2017 while the second was conducted in late 2019.

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 GVB. The survey is used to gain valuable insights regarding how residents feel towards the tourism industry and its overall impact on Guam's economy and the community.

Project Objectives

The survey was designed to identify the following information objectives:

- Determine residents' perception on the state of the economy, crime rate, and standard of living.
- Determine residents' perception on the tourism industry's contribution, its impact on Guam as well as their families, and the number of visitors who come to Guam annually.
- Determine tourism industry's favorability among Guam residents.
- Find out what residents think GVB should be responsible for.
- Determine whether residents desired for more tourism related opportunities and businesses outside Tumon and in the Southern region.
- Identify ratings on statements about the tourism industry on Guam.
- Determine residents' approval of the use of hotel tax revenue for developing projects.
- Determine their awareness of GVB projects, promotions, and advertisements and whether they promote island pride.
- Determine their satisfaction with the performance of GVB.
- Identify the most important items they want GVB to promote and that they want to participate in.
- Determine if the government is reinvesting funds for the better of the community.
- Perceptions of the legal recreational use of Marijuana and impact it will have on tourism industry.
- Perceptions on the Military Realignment "Build-Up" and impact it will have on tourism industry.
- Determine residents' perception on whether improving public transportation would increase people's interest in working in the tourism industry and their likelihood that they would replace their personal vehicles with public transportation.

Project Design

The last STAR survey was conducted by GVB in 2017. In conducting the 2019 survey, GVB was interested in tracking changes in attitudes recorded in prior surveys and investigating current issues, concerns and development within the tourism industry as well as the public's opinion on the military realignment and legalization of recreational use of marijuana. To accomplish this, the project had three elements:

Qualitative Assessment: Two focus groups were convened to explore issues important to residents today. The first group was comprised of industry frontline supervisors to discuss firsthand experiences with issues regarding tourism on Guam. The second group was among local private and public stakeholders representing local government and business interests.

Quantitative Survey: Over 600 residents were interviewed over a three-week period in November 2019. Survey quantitatively assessed issues were identified through the focus groups and tracked changes in items of importance to GVB from prior surveys.

Social Media Listening: Additionally, social media listening was utilized to monitor attitudes about tourism to Guam world-wide. The digital listening sources used Boolean search strings and text analysis algorithms to provide insights into online and social media discussions. Online and social media discussions were then analyzed historically as well as in near real-time as posts appeared online. The sources for this portion of the research included social media (Twitter), traditional / online media (blogs and forums) and news sources, digital listening sources, and other publicly available statistics. The full report on Social Media Listening can be found in Appendix C.

Executive Summary: Qualitative Findings

Frontline Visitor Industry Supervisor Focus Group:

- Generally, the group felt visitors were excited to come to Guam. The island's beaches and ocean environment, people, culture, and overall relaxing environment were felt to be the most influential reasons visitors choose Guam.
- The group believed GVB was doing a good job marketing Guam. GVB had improved its visibility compared to the past 5 years. Successful GVB efforts that came to mind first were the "Hafa Adai" Pledge, trade shows (Travel Talks), and Tourism Works!
- Most of the group felt that GVB should put more effort into cultural events and night life.
- The benefits of working in the visitor industry: **1) Jobs, 2) Money to pay bills, and 3) Friends and relationships.**
- The effects the tourism industry has on participants' lifestyle: **1) Ability to live comfortably, 2) Stressful peak seasons and fewer hours during the off-peak seasons, and 3) More events and places to enjoy.**
- The need to improve safety for those working in and visiting the tourism district: **1) Relocate the homeless in Tumon, 2) Provide more security officers in Tumon, and 3) Improve the lighting in Tumon.**
- Most of the participants believed that the tourism industry provides opportunities for better wages and advancement. However, the group also agreed that visitor industry workers on Guam are paid less when compared to their counterparts in Hawaii.
- Participants felt that it is important to improve the public transportation system on Guam.
- Military's presence was largely viewed as helping to improve the economy, particularly the visitor industry, through the military's spending.
- Most of the participants thought that legalization of marijuana will adversely affect the visitor industry.

Executive Summary: Qualitative Findings

Key Industry Stakeholders:

- The group agreed that GVB has remained true to its mission. However, most participants agreed that there is a need to refresh GVB's mission to remain relevant.
- The group also agreed that there was a need to increase collaboration among agencies in the public and private sectors to aid GVB.
- The group felt that GVB had to maintain their current level of involvement in government functions, because *"If GVB lets go of the reigns, it will go in the wrong direction."* In addition, it was agreed that GVB should have more autonomy regarding these functions and less meddling by the legislature and executive branch.
- The group was also in agreement that GVB should concentrate more on the quality of visitors (level of visitor expenditure) than number of visitors attracted to Guam.
- The group agreed that the government does not currently prioritize improving the visitor industry compared to other issues it faces.
- The respondents were divided on their perception of the military buildup. Safety and security is the primary argument of both those supporting and opposing the build-up.
- Regarding the issue of legalizing marijuana, the group agreed that GVB should not promote or associate with the cannabis industry.

Executive Summary: Quantitative Findings

Economic & Tourism Indicators:

- Most residents have not witnessed much improvement in the economy over the last 12 months.
- Regardless, they were slightly more optimistic that things will improve than they were in 2017.
- While more residents believed that tourism's contribution to the economy has increased over the last two years, it is a smaller proportion than those who felt the same in 2017.
- Regardless, while overall favorability towards tourism as an industry has not changed since 2017, the intensity of that favorability increased in 2019.
- At the same time, while the proportion of residents that rate tourism's impact on the economy as positive in 2019 increased, the intensity of the positive rating decreased.
- Likewise, while the proportion of households that believed that tourism has had a positive impact on their household in 2019 did not change since 2017, the intensity of how positive the impact was has decreased.

Executive Summary: Quantitative Findings

Employment Indicators:

- Guamanians continue to believe that jobs in the visitor industry pay well and that the industry continues to develop well paying jobs with better benefits. Residents also believed that visitor industry jobs provide real opportunities for advancement.
- They were less certain that wages in the visitor industry have helped improve wages in other industries but believed that the standard of living is higher on Guam because of the visitor industry.
- About half of residents continue to believe that visitors are rude and mistreat local people working in the visitor industry.
- Sixty percent of residents believed that local small businesses are getting their fair share of business from the visitor industry.
- Residents believed improving public transportation would increase opportunities for local workers to work in the visitor industry.

Executive Summary: Quantitative Findings

Social Cultural and Environmental Indicators:

- Most residents believed (57%) that tourism contributes to the preservation of natural resources, parks and cultural sites.
- In 2019, there was a slight drop in the proportion of residents who believed tourism contributes to the quality of life (59%) when compared to the 2017 survey (65%).
- There was a slight increase from 62% in 2017 to 69% in 2019 that local people are provided opportunities to get involved in tourism.
- There was a slight but not significant improvement in resident's recognition that GVB is sponsoring events and activities from 68% in 2017 to 72% in 2019.
- Concerns about crime have remained about the same with 62% believing Guam has more crime than it should.
- A much larger change was the decline from 73% in 2017 to 52% in 2019 that tourism helps to preserve the Chamorro culture and language.

Executive Summary: Quantitative Findings

Awareness & Perception of the Guam Visitors Bureau:

- Resident's awareness of GVB has increased slightly from 77% in 2017 to 82% in 2019.
- Residents believed that GVB should concentrate on promoting tourism (58%). Less than half now believe they should be made responsible for managing economic development projects (40%), investing in community projects (40%) for the government or representing the individual interests of tourism businesses (36%).
- Overall, residents believed that GVB is doing a good job promoting Guam's tourism (85%), up from 77% in 2017.
- Residents also believed that GVB is doing a better job in "promoting" Guam's culture, even though residents in 2019 felt GVB was not doing as well in "preserving" Guam's culture and language as they did in 2017.
- The most remembered GVB promotion was the "Hafa Adai Pledge" (65%).
- Overall, the same proportion (64%) have seen or heard a GVB promotion in the last month, 90% indicated that the promotion or advertisement made them proud to be from Guam, and 87% indicated they ads and promotions promoted "island pride."
- Residents would like to participate in more food events, music events, and crafts events. They believed that GVB should promote Guam's traditions, food, and history to visitors.
- Nearly all residents (91%) would like to see tourism develop outside of Tumon, and three quarters (77%) believe that tourism should be developed in the south. Nearly all residents believed that Hotel Occupancy Tax revenue bonds should be used to finance maintenance of public parks and monuments (91%), develop new attractions (86%) and improve infrastructure in Tumon (83%).

Executive Summary: Quantitative Findings

Legalization of Recreational Marijuana & Military Realignment "Build-Up"

- Residents were split on their support of the legalization of cannabis with 51% supporting the new law and 41% opposing it, and the rest not being sure.
- Less than half (40%) felt it will help the industry, 30% believed it might harm tourism, and 20% were unsure.
- Nearly two-thirds (63%) said they support the military buildup.
- Fifty-one percent believed it helps the tourism industry with 20% believing that it hurts the industry and a further 24% indicating they are not sure how it effects the industry.

Executive Summary:

Social Media Listening Observations

Social Media has registered a consistent net positive rating for GVB since 2018.

Local participation and affinity to events and promotions suggested that GVB should promote tourism to locals during the offseason.

- Reinforces tourism's importance to the island economy as well as nurtures a sense of place and community
- Guam residents are the best ambassadors to sell and promote the island and deliver on the visitor experience.

While not included in the quantitative survey, social media listening indicated that Kpop is a powerful promotional tool.

- Research local views on Kpop and its global rise in music.
- Use music to create a connection between Guam residents and tourists.
- Generates high social media mentions about Guam which lean positive.

Analysis of local comments indicated that GVB should endorse educational services and historical landmarks as a means of improving local affinity for the organization.

- Rich WWII and military history.
- Sponsor cultural events that bond tourist and Guam residents.
- Environmental education including local wild and marine life.



Qualitative Assessment Frontline Industry Supervisors

FOCUS GROUP ONE

Focus Group One: Purpose

A major indicator of the public's assessment of the benefit of tourism in the 2017 STAR survey was the belief that wages, benefits, and opportunities provided by businesses in Guam's visitor industry were better than other businesses. The 2017 survey measured only the attitudes of residents and did not identify specifically how people that work in the industry felt. The GVB research team wanted to explore this further and was generally interested in discerning how similar or dissimilar opinions about tourism and GVB may be between those that work in the industry and residents that do not. The focus group was conducted on September 19, 2019 at MR&D . There were eight participants within the group whom were tourism industry frontline supervisors who have daily contact with visitors. The full report for Focus Group 1 can be found in Appendix A.

Focus Group One: Objectives

The information objectives of the first group (frontline supervisors) were:

1. Explore how they perceive visitors overall feel about Guam, as a destination, and how visitors from different source market feel about their experience on Guam.
2. Gain insight as to what the group believed were the most important issues regarding employment in the tourism industry.
3. Explore how the group viewed the opportunities for better wages and advancement provided through tourism.
4. Examine how well the group felt GVB was doing in marketing Guam.
5. Identify the participants perceptions of the impacts of improving public transportation, military realignment and the legalization of recreational marijuana.

Summary of Findings

Generally, the group felt visitors were excited to come to Guam. The island's beaches and ocean environment, people, culture, and overall relaxing environment were felt to be the most influential reasons' visitors choose Guam. The group also agreed that negative factors of Guam that visitors complained about were hot weather, mosquitoes, and lack of variety in food and cultural entertainment.

Among the source markets, most of the participants in the group had the following descriptions:

- Korean visitors were “complainers”, Japanese visitors were “good customers” and “disciplined”, Chinese and Taiwanese visitors were “bargain hunters” and Filipinos were “shoppers”.

When discussing the most important issues impacting employment within the industry there were three aspects: 1) the benefits of working in the visitor industry, 2) the effects the industry has on worker's lifestyle and 3) improving safety for those working and visiting Tumon. The group agreed on three elements for each aspect:

- The benefits of working in the visitor industry: **1) Jobs, 2) Money to pay bills, and 3) Friends and relationships.**
- The effects the tourism industry has on participants' lifestyle: **1) Ability to live comfortably, 2) Stressful peak seasons and fewer hours during the off-peak seasons, and 3) More events and places to enjoy.**
- The need to improve safety for those working in and visiting the tourism district: **1) Relocate the homeless in Tumon, 2) Provide more security officers in Tumon, and 3) Improve the lighting in Tumon.**

Summary of Findings

During the exploration of how participants view wages and opportunities in the industry, most of the participants in the group believed that the tourism industry provides opportunities for better wages and advancement such as management and apprenticeship programs. However, the group also agreed that visitor industry workers on Guam are paid less when compared to their counterparts in Hawaii.

The group believed GVB was doing a good job marketing Guam. Most of the participants in the group noticed that GVB had improved its visibility compared to the past 5 years. Successful GVB efforts that came to mind first were the “Hafa Adai” Pledge, trade shows, and Tourism Works!

The GVB initiated event the group was most aware of was the Guam Micronesia Island Fair (GMIF) because “it brings people together”. Most of the participants in the group felt that GVB should put more effort into cultural events and night life.

Summary of Findings

Participants felt that it is important to improve the public transportation system on Guam. The group stressed that it needed to be more convenient, (better locations serviced) reliable, and affordable for tourism industry workers to utilize it regularly.

Military's presence was largely viewed as helping to improve the economy, particularly the visitor industry, through the military's spending, which increases businesses' sales and revenue.

Most of the participants in the group thought that legalization of marijuana will adversely affect the visitor industry. Despite the benefits of more taxes and more jobs, there were greater concerns about control and regulation, health of marijuana smokers (both locals and tourists), addiction, and crime rates.



Qualitative Assessment Key Industry Stakeholders

FOCUS GROUP TWO

Focus Group Two: Purpose

The research team also wanted to gain insight about how industry stakeholders felt about the role GVB is playing in the visitor industry and its impact on the community and the economy. The group was comprised of industry leaders from a wide variety of business interests including optional tour operators, air lines, security and safety executives, retailers, the Guam Chamber of Commerce and the Guam legislature. The group discussion included six participants and was conducted on October 11, 2019 at the Guam Visitors Bureau. The complete report of the findings of discussion can be found in Appendix B.

Focus Group Two: Objectives

The selection of industry stakeholders as participants in the second focus group was to determine GVB's role in supporting the local economy and tourism industry. Specifically, the objectives of the second FGD were to obtain insights from key tourism industry stakeholders regarding the following:

1. A review of GVB's role in supporting and developing tourism.
2. The impact of the industry on the economy and community and the best measures to gauge resident satisfaction with Guam as a tourist destination.
3. The efficacy of the government's investments in the industry.
4. The impact of the military build-up and the legalization of cannabis.

Summary of Findings

After reviewing the mission statement of GVB the group agreed that the organization has remained true to its mission. However, most participants agreed that there is a need to refresh GVB's mission to remain relevant. The group felt that the process should include GVB members and industry stakeholders to determine the direction of the organization for the next five to ten years.

The group also agreed that there was a need to increase collaboration among agencies in the public and private sectors to aid GVB. They also felt that there was a need to have the government play a greater role in helping to support and develop the industry.

At the same time, the group felt that GVB had to maintain their current level of involvement in government functions because "If GVB lets go of the reigns, it will go in the wrong direction." In addition, it was agreed that GVB should have more autonomy regarding these functions and less meddling by the legislature and executive branch. The group recommended that GVB have stronger control over how TAF funds are used, particularly for non-tourism related projects.

The group was in agreement that GVB should concentrate more on the quality of visitors than number of visitors attracted to Guam. It defined quality as "visitor expenditure", the repeat visitor rate, and the number of different source markets for visitors to Guam.

Summary of Findings

When asked what the benchmark measures should be used to gauge resident satisfaction with Guam as a tourist destination the group agreed upon measures related to **safety and security, the cost or standard of living, improved infrastructure, and the diversity of attractions.**

The participants thought that despite the community being educated about the economic importance of tourism, the government does not currently prioritize improving the visitor industry compared to other issues it faces. They also believed that the community does not participate enough in keeping Guam a satisfying destination.

The respondents were divided on their perception of the military buildup. Safety and security is the primary argument of both those supporting and opposing the build-up. Those who supported the build-up believed the military's presence makes Guam safer. Those who opposed the military's presence believed it makes Guam a target.

Regarding the issue of legalizing marijuana, the group agreed that GVB should not promote or associate with the cannabis industry. It is a controversial topic and GVB's involvement in it may have a negative impact on the agency.



Quantitative Survey

Survey Analysis & Significant Findings

Integration of Qualitative Results in the Survey Process

The following topics in the focus group discussions were explored further in the quantitative portion of the STAR survey:

1. The impact the tourism industry has on the local economy as well as individual families.
2. Important factors GVB should be responsible for.
3. Employment opportunities in the tourism industry and the welfare of workers within the industry.
4. Visitors and residents' awareness, interest, and participation in GVB's promotions and activities.
5. The impact of improving public transportation, the legalization of recreational marijuana and the Military realignment "Build-up".

Survey Methods

These findings were derived from a telephone survey of 602 randomly selected residents over the age of 18.

A two-stage probability sampling method was employed. The sample used randomly selected published residential landline and cellphone numbers to identify households to be interviewed. Residential landline numbers (80% of the sample) and postpaid account cellphone numbers (20% of the sample) were pooled and then randomly selected and called. Once the household was engaged, the respondent living in the household who is 18 years old and over with the most recent birthday was interviewed. Thus both the household and the respondent were randomly selected.

The survey yielded results accurate to within $\pm 4\%$ at a 95% confidence level. If the survey were replicated, similar results would be obtained 95 times out of 100.

Demographics & 2010 Census

Generally, the demography of the sample reflects the results obtained from the 2010 Census. The exceptions within this survey were age and ethnicity.

Looking at age, there was a disproportionately high percentage of older respondents in the STAR survey. Fifty-seven percent (57%) of the population was 45 years of age or older. The U.S. census reported that 35% of the population on Guam was over the age of 45 in 2010.

During the survey period, the sample collected a lower percentage of Chamorros. The 2010 US Census reported that 54% of the population was Chamorro whereas the STAR survey sampled 45% Chamorros.

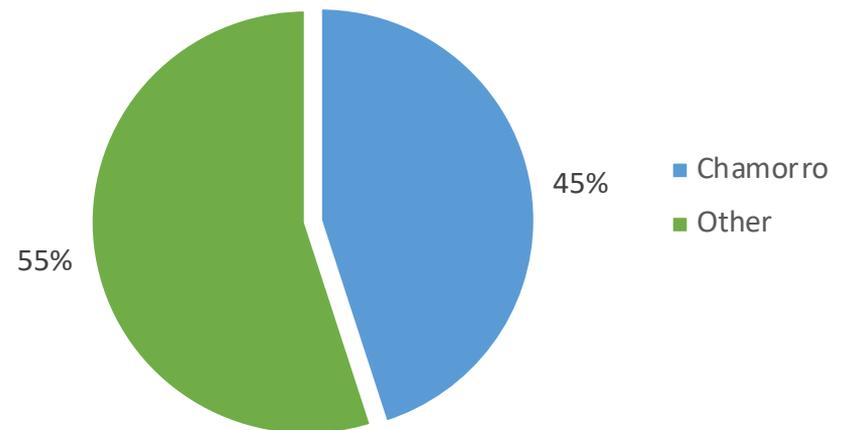
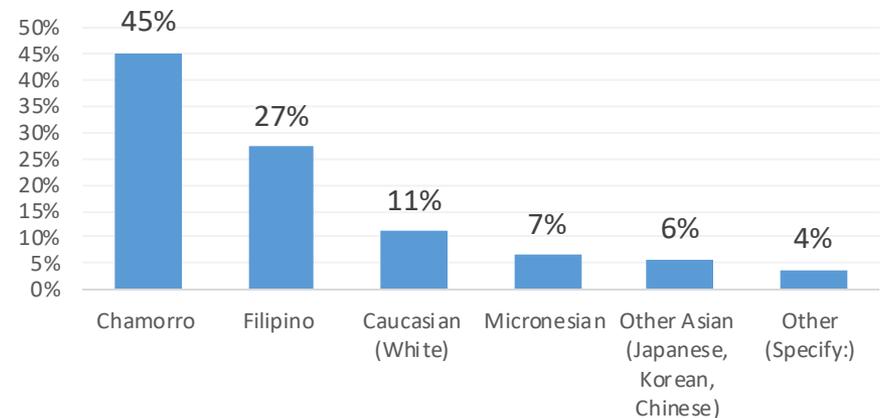
Ethnicity

Of the sample population, nearly half (45%) of the respondents were Chamorro and 27% of respondents were Filipino.

While different from the U.S. Census, the difference did not have an impact on how residents responded on any other question they were asked.

An analysis of the relationship between ethnicity and the responses provided to all other questions found no meaningful impact.

Ethnicity
n=602

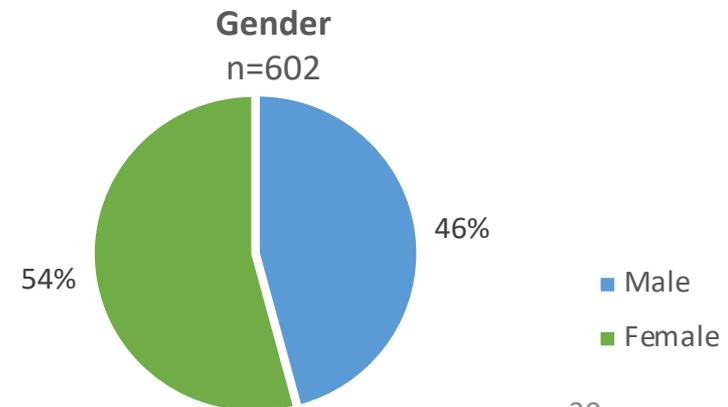
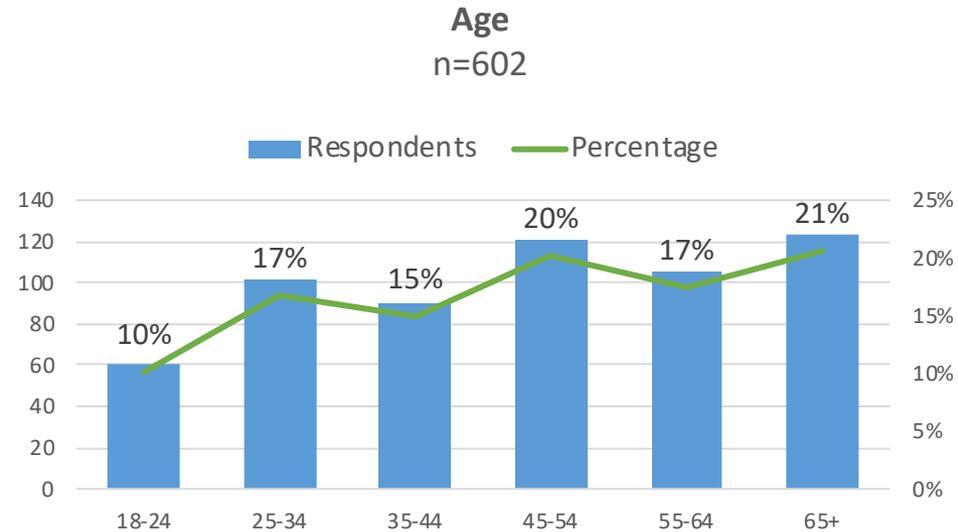


Age & Gender

More than half (54%) of the respondents were female and 38% of the population was over the age of 55.

The age of the sample was slightly skewed towards older respondents. Again, age was cross tabulated against all other variables and the only relationship found indicated a weak, but statistically significant relationship between age and awareness of GVB.

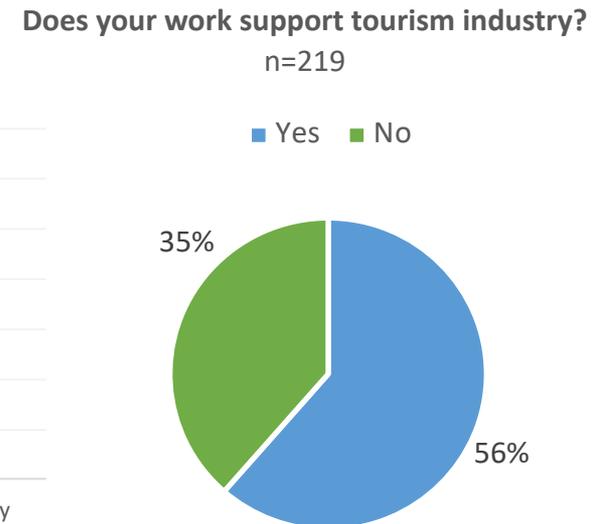
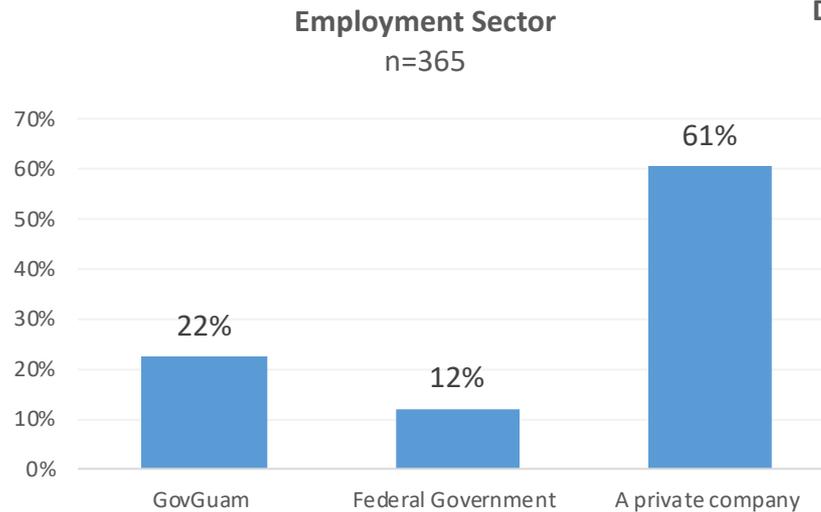
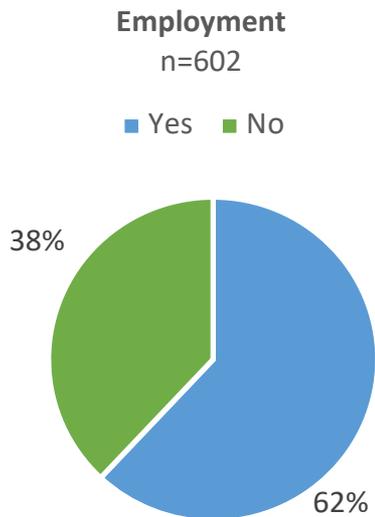
Older residents were more likely to be aware of GVB than residents under the age of 25.



Employment

Sixty-two percent (62%) of the respondents were employed and among that population, 61% worked within the private sector.

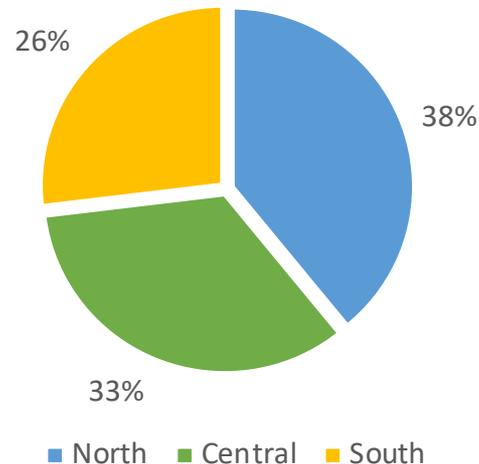
Among the employed respondents, more than half (56%) stated that their work supports the tourism industry.



Residency

The sample was generally evenly distributed between the North, Central and South.

Residency by Region



Village Residence

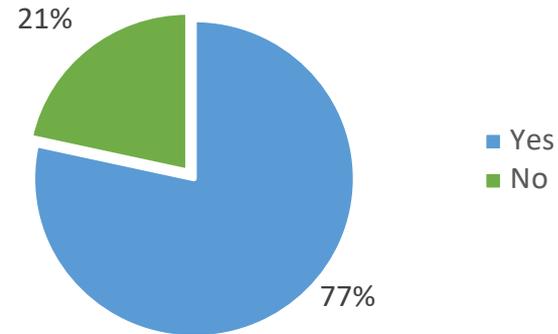
	Frequency	Percent
North		
Dededo	101	17%
Tamuning	37	6%
Tumon	23	4%
Yigo	67	11%
Central		
Agana Heights	15	3%
Agana/Hagatna	10	2%
Asan-Maina	2	0%
Barrigada	59	10%
Chalan Pago	15	3%
Mangilao	36	6%
Mongmong-Toto-Maite	28	5%
Ordot	11	2%
Piti	6	1%
Sinajana	15	3%
South		
Agat	18	3%
Inarajan	12	2%
Merizo	20	3%
Santa Rita	46	8%
Talofoto	17	3%
Umatac	15	3%
Yona	29	5%

Voters

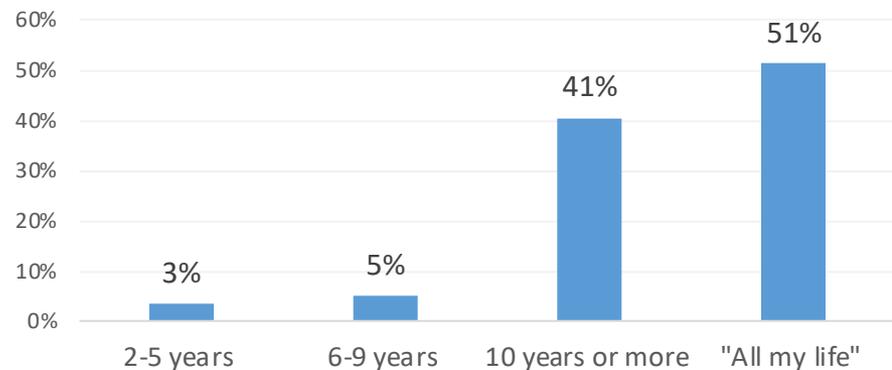
More than three-quarters (77%) of respondents claimed that they were registered voters.

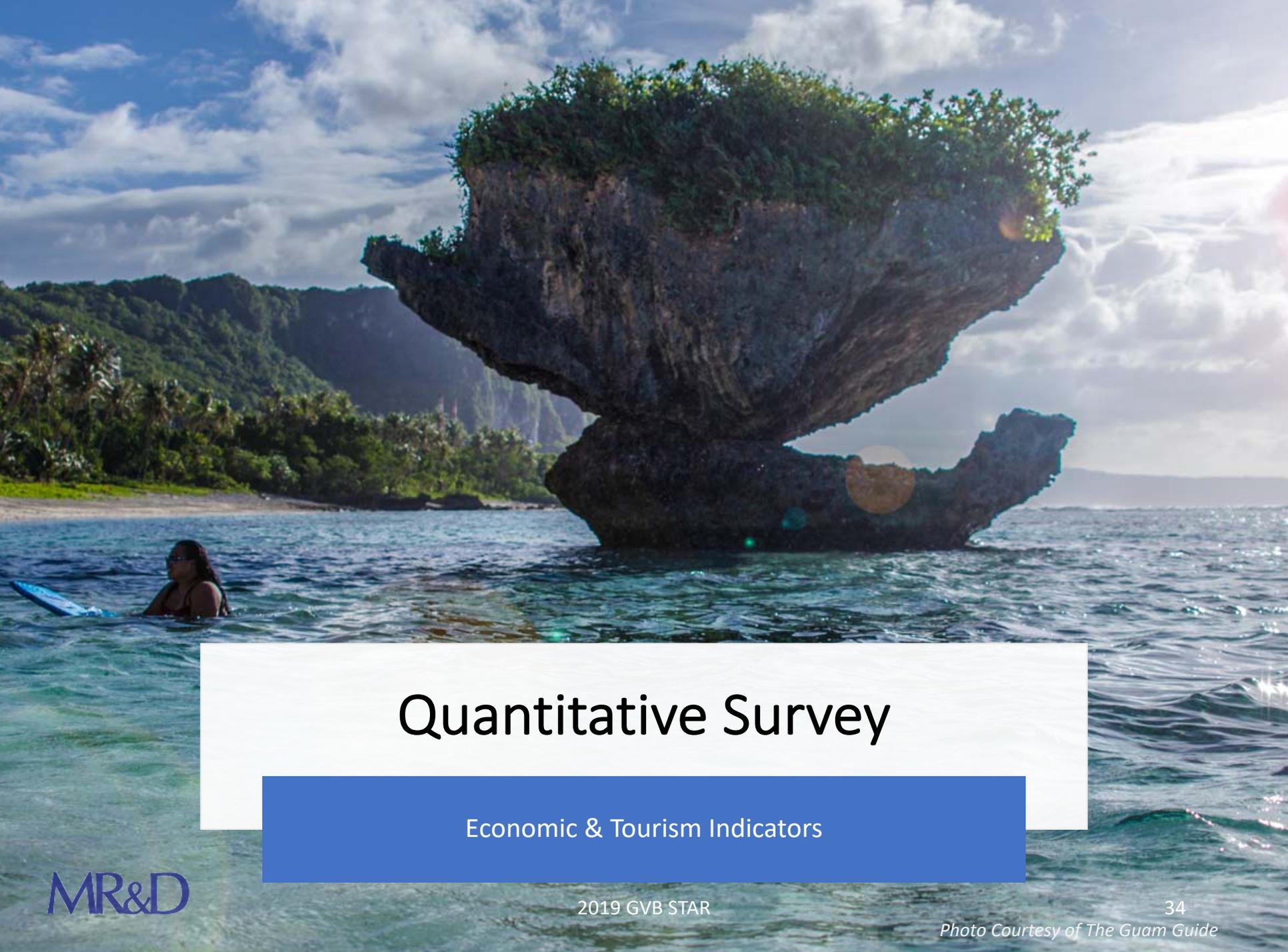
More than half (51%) of the respondents stated that they have lived on Guam their whole life.

Are you a registered voter?
n=602



How long have you lived on Guam?
n=602





Quantitative Survey

Economic & Tourism Indicators

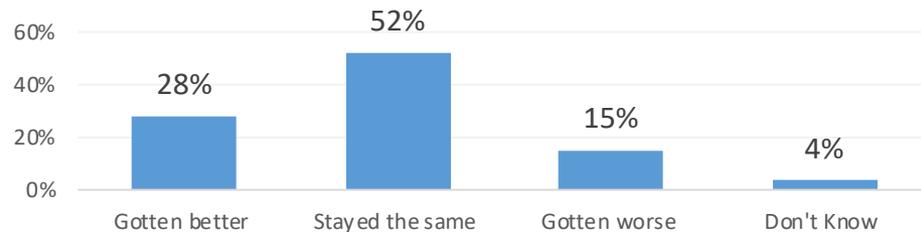
Local Economy

Most respondents (80%) felt that within the year the economy either stayed the same (52%) or had gotten better (28%).

Nearly half (47%) of the respondents felt that the economy will improve over the next twelve months.

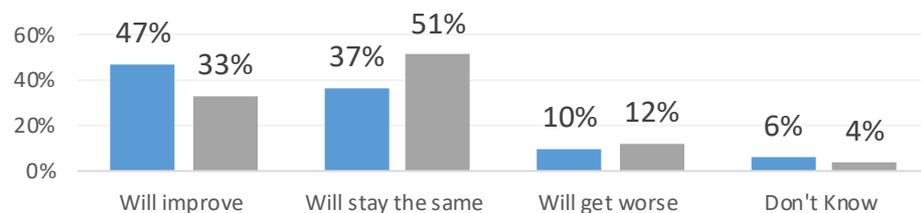
Over the last twelve months, do you think Guam's economy has gotten better, stayed the same or gotten worse?

n=602



In the next twelve months, do you think Guam's economy will improve, stay the same or get worse?

■ 2019 (n=602) ■ 2017 (n=1255)



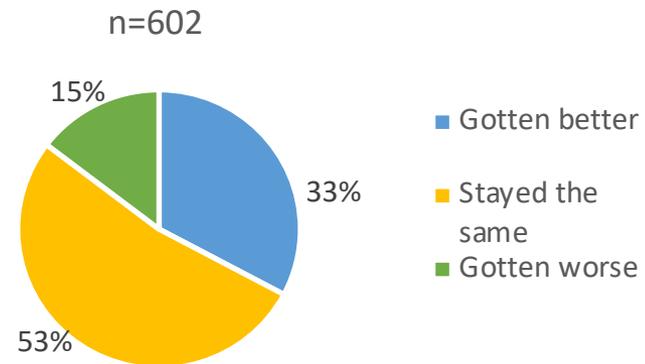
Tourism's Contribution to the Local Economy

More than half the respondents (53%) felt that the standard of living has stayed the same and 33% felt that it had gotten better.

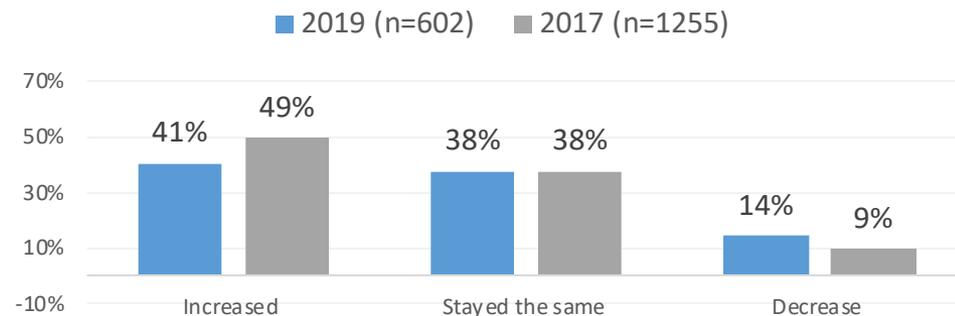
Forty-one percent (41%) of respondents felt that tourism's contribution to the local economy has increased, down from 49% in 2017.

There was no change in the proportion of respondents who believed tourism's contribution to the economy had stayed the same (38%).

In the last year has your standard of living gotten better, stayed the same or gotten worse?



Over the last two years, do you think tourism's contribution on the local economy has...

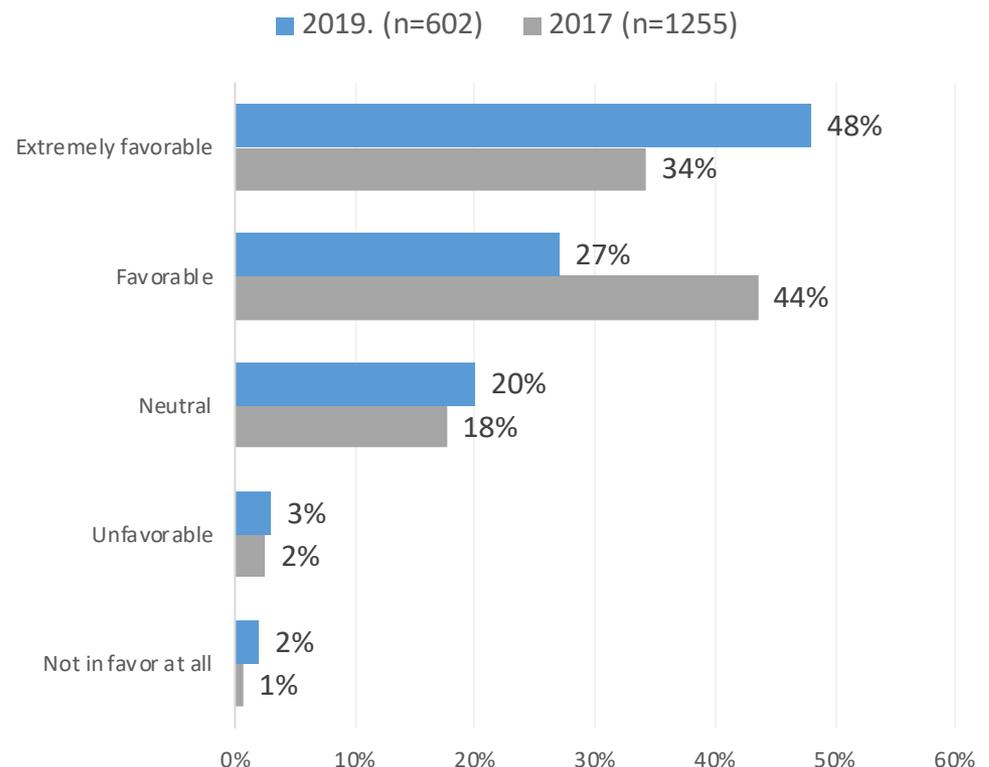


Favorability Towards Tourism

In 2019 most respondents (75%) felt either favorable (27%) or extremely favorable (48%) about tourism as an industry.

There was an increase in the intensity of favorability felt in 2019 when compared to 2017 though the overall proportion of those who felt favorable had not changed.

Please give me your rating of how you feel about tourism as an industry on Guam.

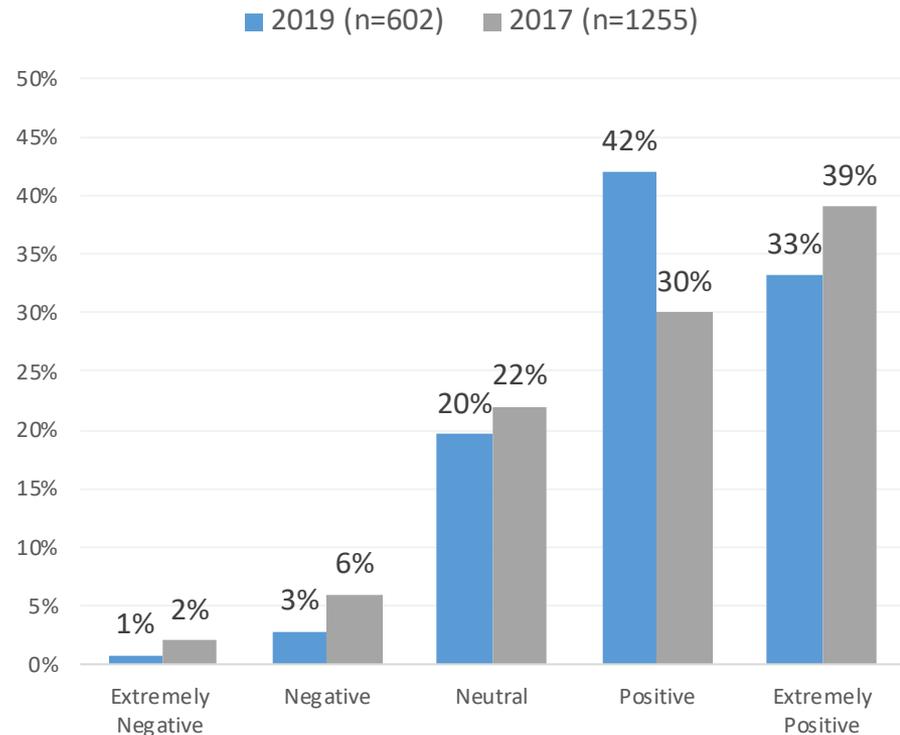


Tourism's Impact on Guam

Three-fourths (75%) of respondents stated that tourism has a positive impact on the island, in which 33% stated tourism has an “extremely positive” impact on Guam, overall.

In 2017, more respondents rated tourism's impact as extremely favorable, but the total proportion of respondents rating the impact as favorable was less.

How would you rate the overall impact tourism has on Guam overall?

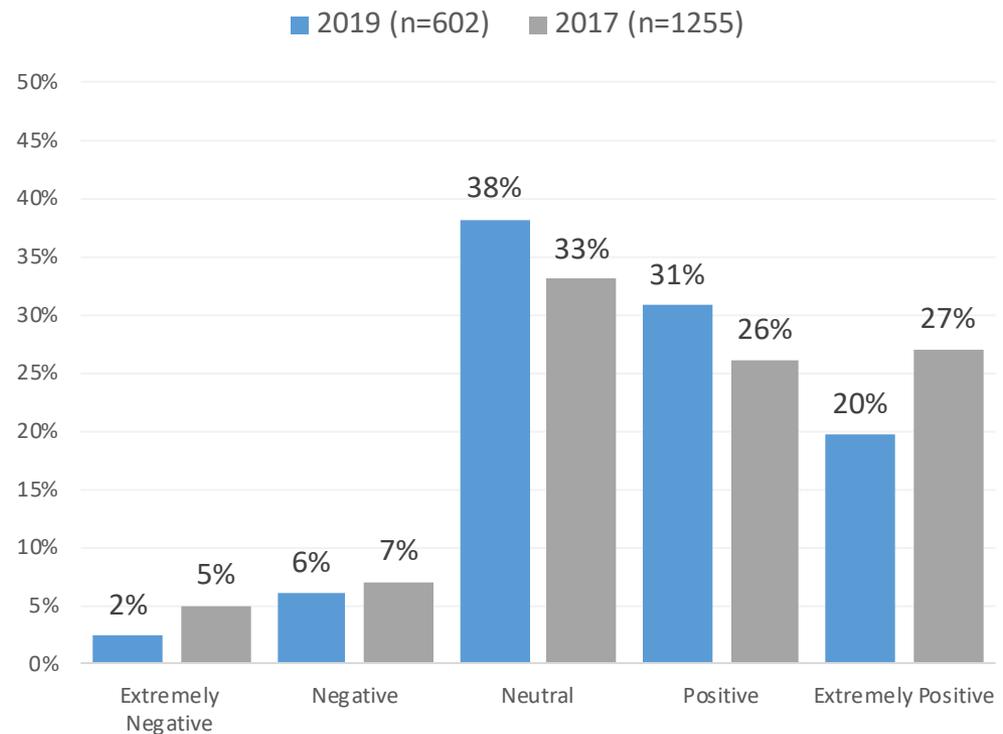


Tourism's Impact on Individual Households

While slightly more than half (51%) of respondents weighted tourism as having a positive impact on their family, almost 40% (38%) noted that the industry had no effect on their family.

There was a slight decline in the intensity of the respondents rating on the impact of tourism on their family but no significant difference on the proportion of respondents that rated the overall impact as positive.

How would you rate the overall impact tourism has on you and your family?



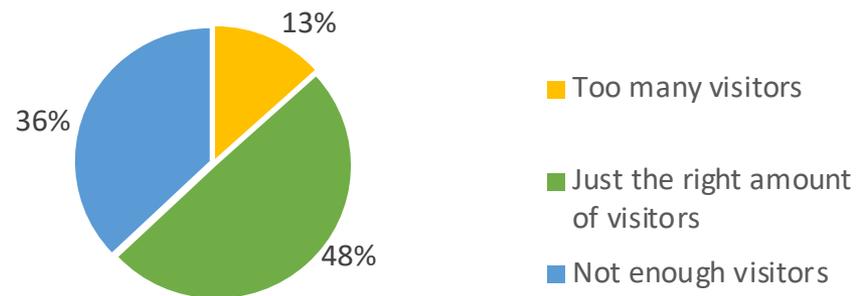
Quantity of Visitors

Almost half (48%) of the respondents felt that Guam has just the right number of visitors annually.

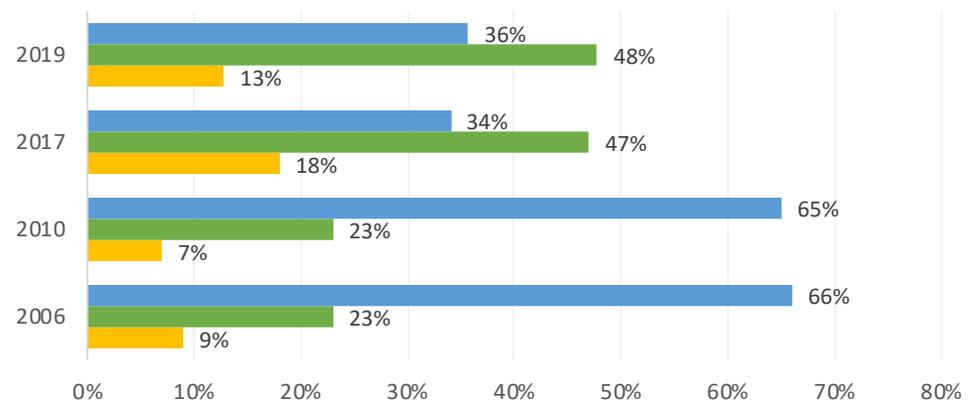
There was no difference between the results obtained in 2019 and 2017.

How do you feel about the number of visitors annually on Guam?

n=602



How do you feel about the number of visitors annually on Guam?



General Observations: Economic & Tourism Indicators

- Most residents have not witnessed much improvement in the economy over the last 12 months.
- Regardless, they were slightly more optimistic that things will improve than they were in 2017.
- While more residents believed that tourism's contribution to the economy has increased over the last two years, it was a smaller proportion than those who felt the same in 2017.
- Regardless, while overall favorability towards tourism as an industry has not changed since 2017, the intensity of that favorability increased in 2019.
- At the same time, while the proportion of residents that rated tourism's impact on the economy as positive in 2019 increased, the intensity of the positive rating decreased.
- Likewise, while the proportion of households that believed that tourism has had a positive impact on their household in 2019 did not change since 2017, the intensity of how positive the impact was has decreased.
- There was no change in resident's attitudes towards the number of visitors coming to Guam.

Residents believed that tourism is contributing and improving Guam's economy but they have not experienced much change because of it in the last year. Hence, while it is still true that most people believed in tourism as a positive contributor, the intensity of those feelings has begun to slip. Regardless, three quarters of Guamanians harbored favorable feelings for the industry.



Quantitative Survey

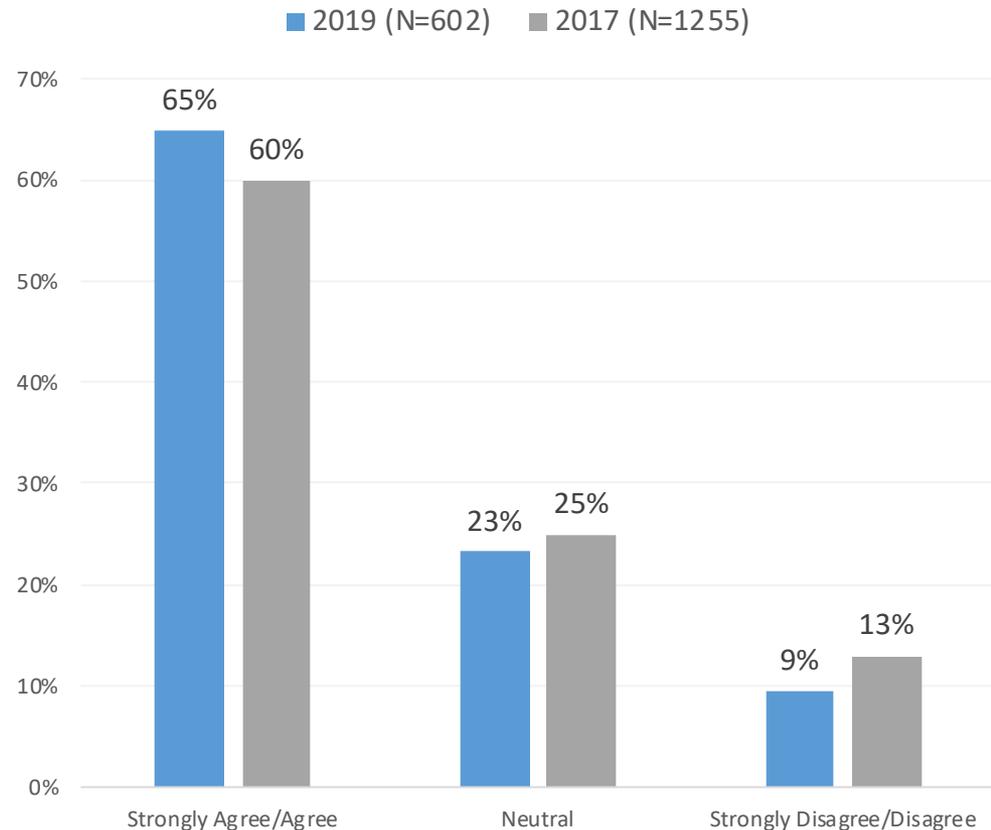
Employment Indicators

Tourism Creates Well Paying Jobs

Most respondents (65%) thought that tourism creates well-paying jobs for residents.

About the same proportion of residents (61%) felt the same in 2017.

Do you think Tourism creates well paying jobs for residents?

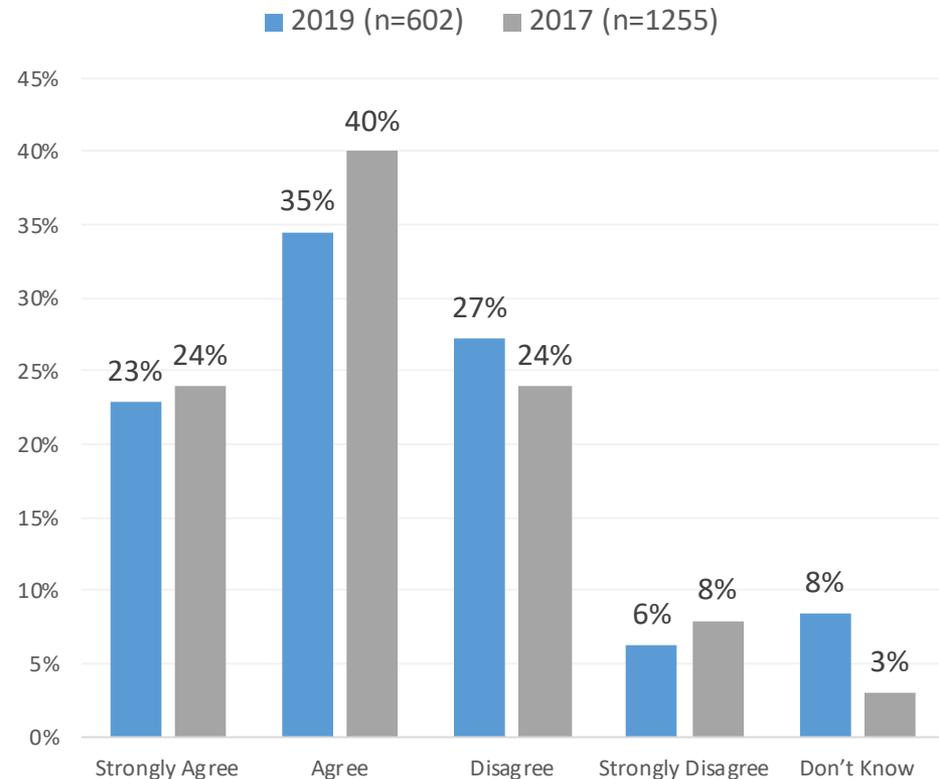


Most Tourism Jobs Pay Well

Almost sixty percent (58%) of respondents agreed that jobs within the tourism industry pay well.

In 2017, a slightly higher percentage (64%) felt that visitor industry jobs pay well.

Most tourist industry jobs pay pretty well.



Employment Benefits

About half (48%) of respondents agreed that employment benefits offered in the tourism industry are better than other jobs, nearly the same proportion (41%) as those who disagreed.

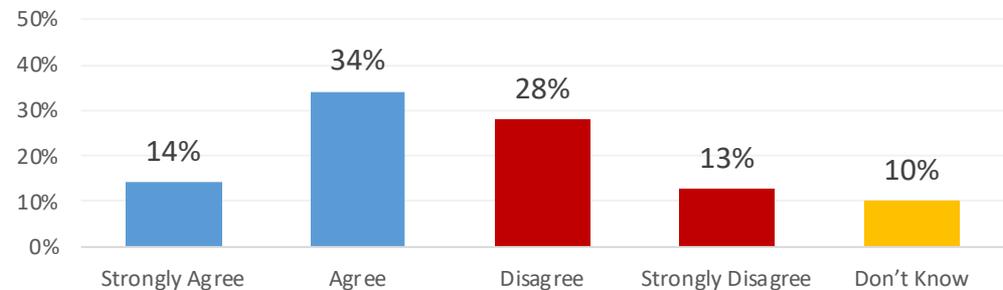
This was a significant change from 2017 where nearly sixty percent (59%) felt that the benefits in the visitor industry were better.

Frontline Industry Supervisors Comment:

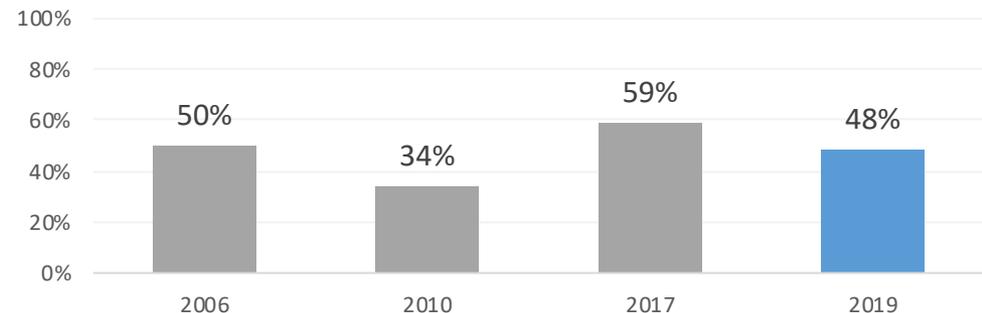
"It gives us benefits. It depends on the company we work for."

Employment benefits in the tourism industry are better than other kinds of jobs.

n=602



Respondents agree to the statement above.



Advancement Opportunities

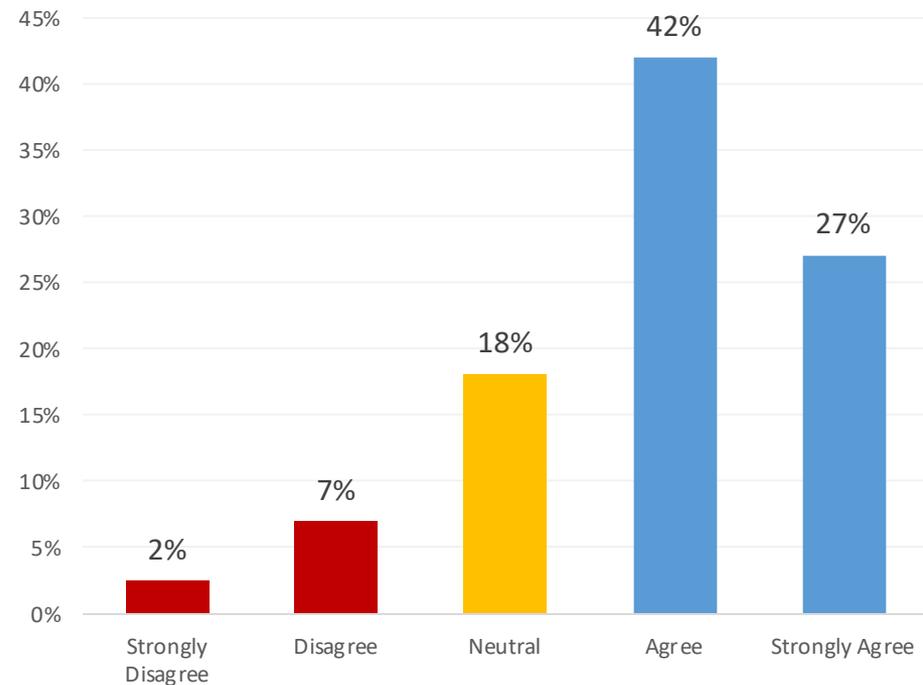
Nearly seventy-percent (69%) of respondents agreed that the tourism industry creates jobs that have opportunity for advancement.

Frontline Industry Supervisors Comment:

"They're very good. Hilton has a lot of programs to move up. They have management programs. They push you to go to school. They have apprenticeship programs. I think advancement is there."

Creates jobs that have opportunities for advancement.

n=602



Salaries & Wages

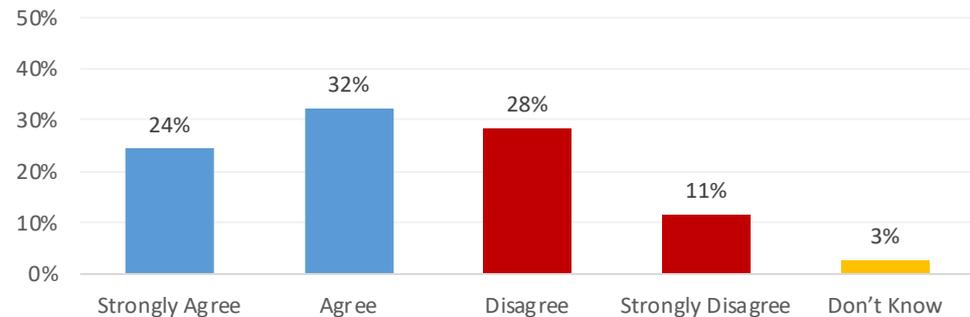
A much smaller proportion (56%) of respondents agreed that salaries and wages are higher on Guam because of tourism while 39% disagreed.

This was similar to the proportion that agreed that salaries and wages are higher because of tourism in 2017 (61%).

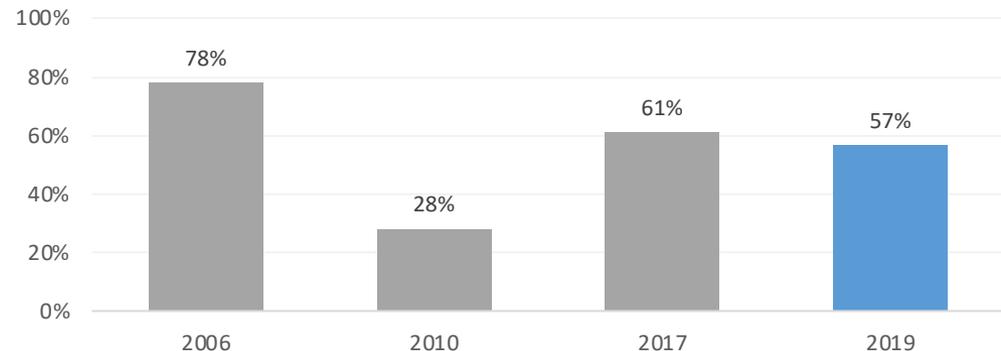
Frontline Industry Supervisors Comment:

"That's one of the things our tourists like. Our pricing. But it's because of that also that the businesses are locked down with that kind of pricing. That's why our pay is also hurting."

Salaries & Wages are higher on Guam because of Tourism.
n=602



Respondents agree to the statement above.



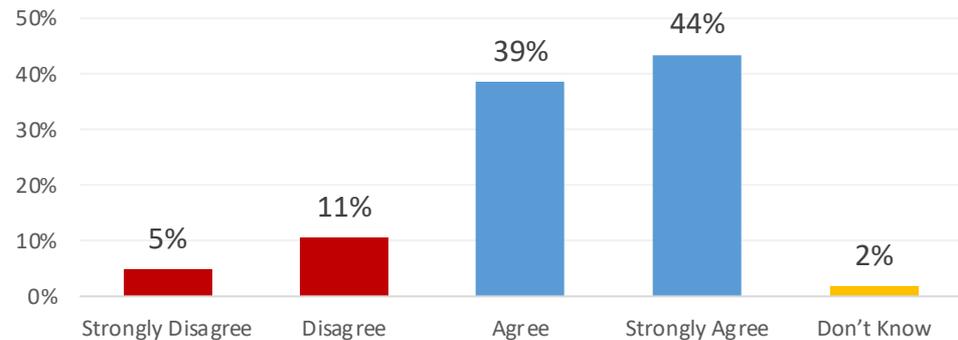
Standard of Living

Most respondents (83%) believed that the standard of living on Guam would be less without the tourism industry.

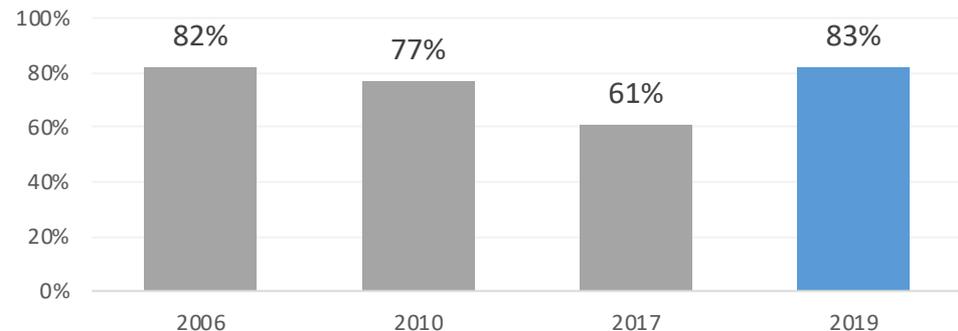
This was a significantly larger proportion of residents than what was identified in 2017 (61%).

Do you think without Tourism the standard of living on Guam would be less?

n=602



Respondents agree to the statement above.



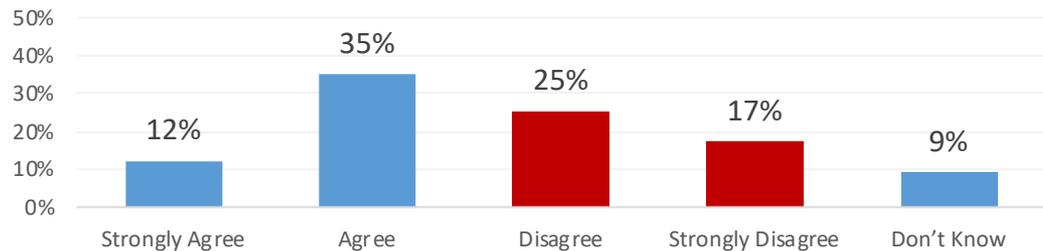
Treatment of Workers

There was a slight difference of five-percent between those who agreed (47%) and those who disagreed (42%) on the treatment of workers within the tourism industry by visitors.

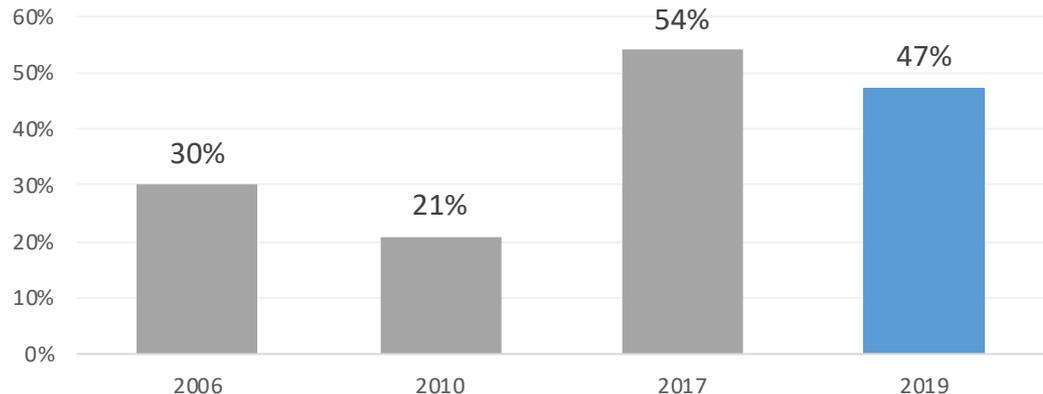
There was a small reduction in the proportion of residents that believed that local workers are mistreated by visitors when compared to the results of 2017.

Visitors usually treat tourism industry workers like servants (poorly/rude) in a demeaning manner.

n=602



Respondents agree to the statement above.



Local Stores

Nearly 60% (58%) of respondents agreed that local stores are getting a fair share of business that is being created by tourism. More than a third (37%) disagreed.

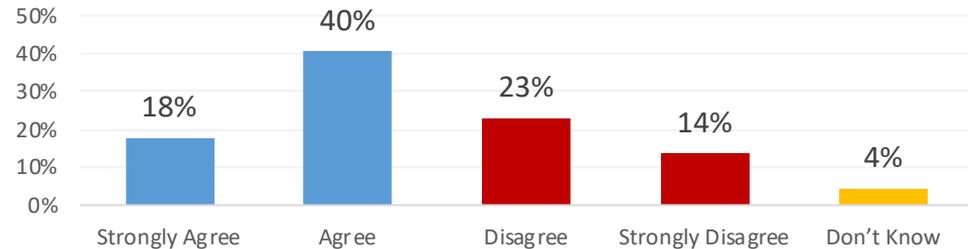
This also was unchanged from the 2017 survey.

Key Industry Stakeholders Comment:

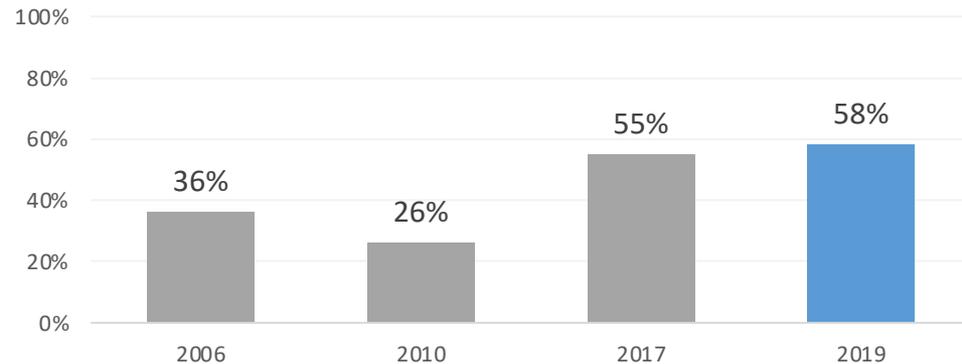
"Smaller businesses are thriving because tourists want to experience local stores and areas."

Local stores are getting fair share of business created by tourism.

n=602



Respondents agree to the statement above.

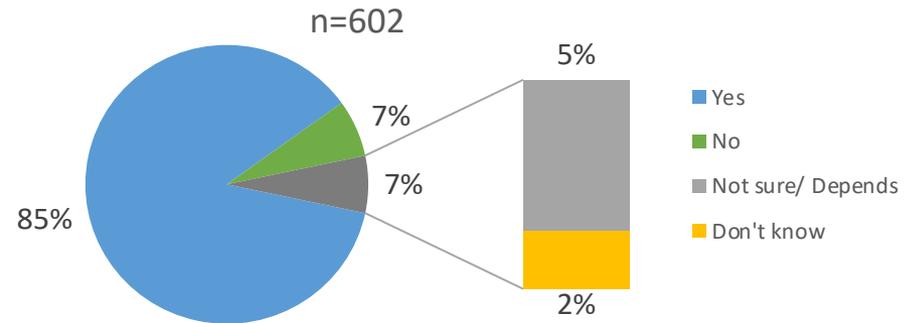


Public Transportation Indicators

Most respondents (85%) felt that the improvement of public transportation to and from Tumon from other villages would increase individuals' interest in working in the tourism industry.

While slightly more than half (52%) would likely replace their personal vehicle with public transportation, a quarter were unlikely to do so.

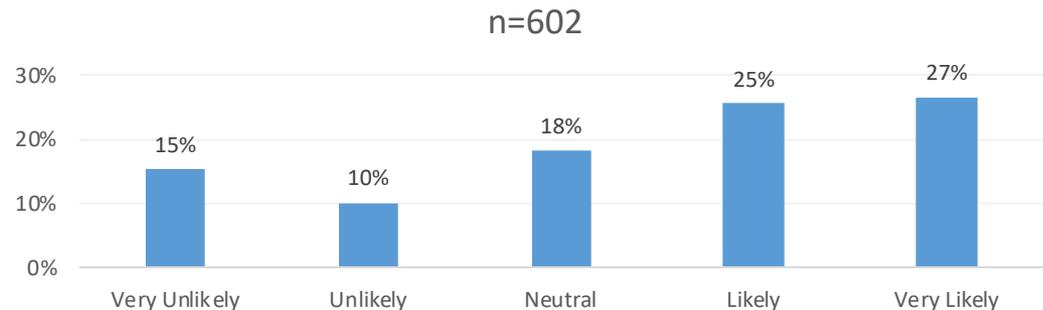
Do you feel that improving public transportation to and from Tumon Bay and other villages would increase people's interest in working in the tourism industry?



Frontline Industry Supervisors Comment:

"There are so much cars in Guam. So much traffic. There are people in our tourism industry who are not able to afford transportation, so it becomes a problem. They hold 2 or 3 jobs. Plus our parking is also becoming a problem. If we have that mass transit, then it can help the parking situation in each property in Tumon. We can have more local customers come in each property."

How likely would you be to replace the use of your personal vehicle with public transportation if public transportation were to be improved?



General Observations: Employment Indicators

- Guamanians continued to believe that jobs in the visitor industry pay well and that the industry continues to develop well paying jobs with better benefits than what is found in other industries. Residents also believed that visitor industry jobs provide real opportunities for advancement.
- They were less certain that wages in the visitor industry have helped improve wages in other industries but strongly believed that the standard of living is higher on Guam for everyone because of the visitor industry.
- About half of residents continue to believe that visitors are rude and mistreat local people working in the visitor industry. At the same time about 60% of residents believed that local small businesses are getting their fair share of business from the visitor industry.
- Finally, residents overwhelmingly believed that improving public transportation would increase opportunities for local workers to work in the visitor industry. About half indicated that they would be willing to replace the use of their personal vehicles with public transportation if it was improved.



Quantitative Survey

Social, Cultural & Environmental Indicators

Sustaining Resources

Almost sixty-percent (57%) agreed that the tourism industry helps sustain Guam's natural resources, parks and cultural sites, while a quarter of the respondents were neutral on the topic.

This is about the same proportion (60%) that stated that tourism helps sustain Guam's natural resources, parks and cultural sites in 2017.

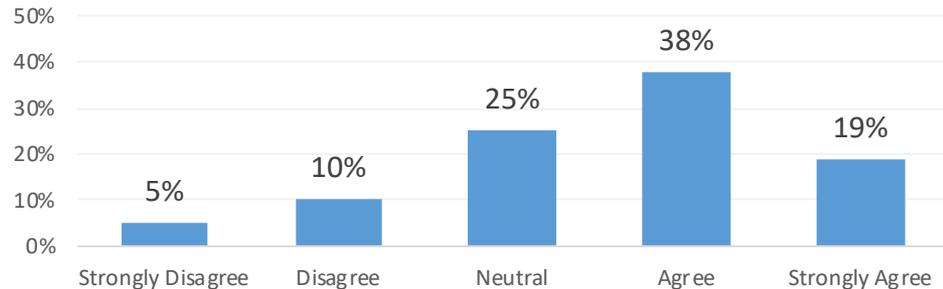
Key Industry Stakeholders Comment:

"A lot of these are historical parks and are important for our kids... future generations. If they are not maintained, they will erode and become trash."

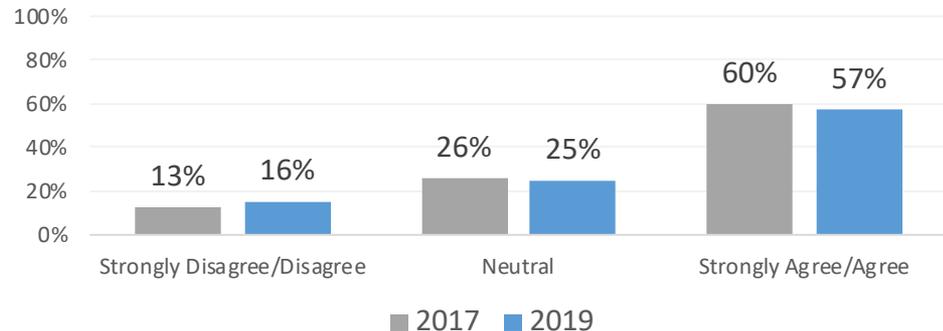
"If GVB lets go of the reigns, it will go in the wrong direction."

Tourism helps sustain Guam's natural resources, parks and cultural sites.

n=602



Tourism helps sustain Guam's natural resources, parks and cultural sites.



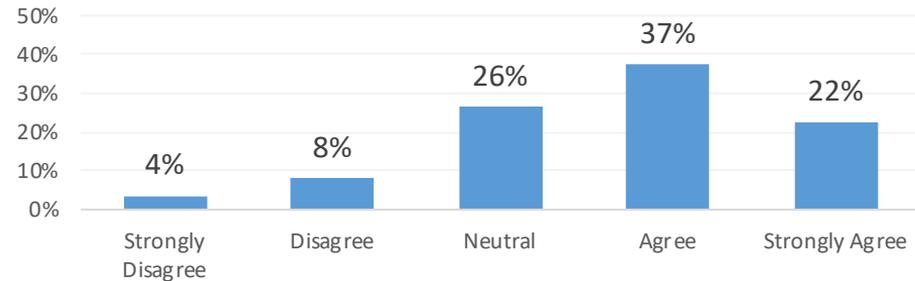
Quality of Life

While eighty-three percent (83%) of residents believed that the visitor industry improves the standard of living on Guam, a much smaller proportion (59%) agreed that the industry enhances the quality of life on Guam.

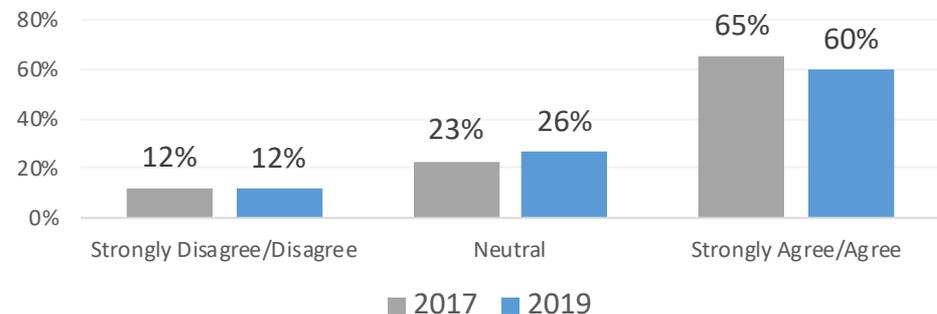
While nearly sixty-percent (59%) of residents believed that the visitor industry enhances the quality of life on Guam, it is less than the proportion (65%) that felt the same in 2017.

Tourism is an industry that enhances the residents' quality of life.

n=602



Tourism is an industry that enhances the residents' quality of life.



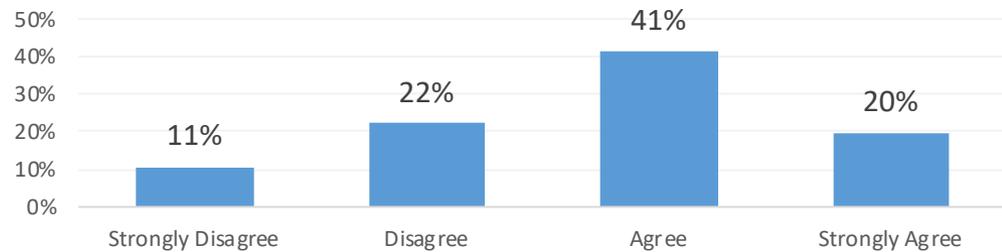
GovGuam Investment

Over sixty-percent (61%) of respondents agreed that the government of Guam is reinvesting tourist revenue into improving the quality of life for residents.

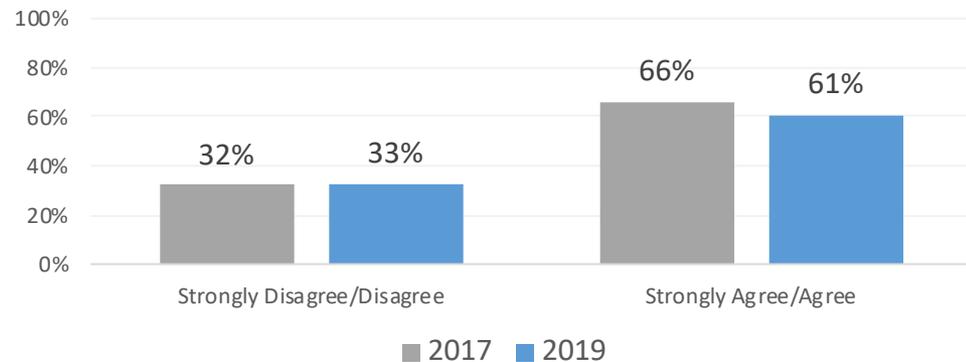
Resident agreement that GovGuam is investing tourism revenue to improve the quality of life has declined slightly since 2017.

The Government of Guam is reinvesting tourist revenue into improving the quality of life for residents.

n=602



The Government of Guam is reinvesting tourist revenue into improving the quality of life for residents.



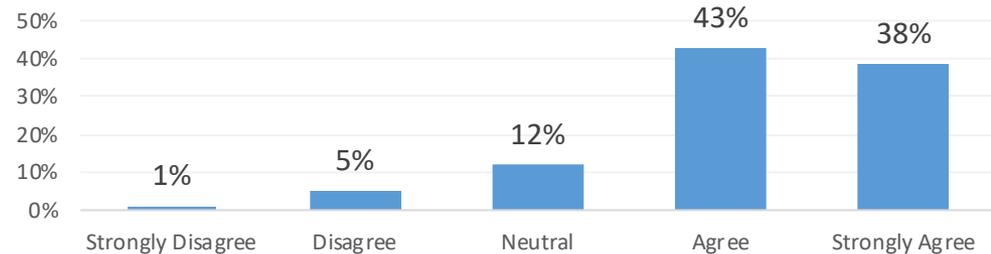
Entertainment Opportunities

A majority (81%) of respondents agreed that tourism creates opportunities for entertainment experiences which include shopping and restaurants.

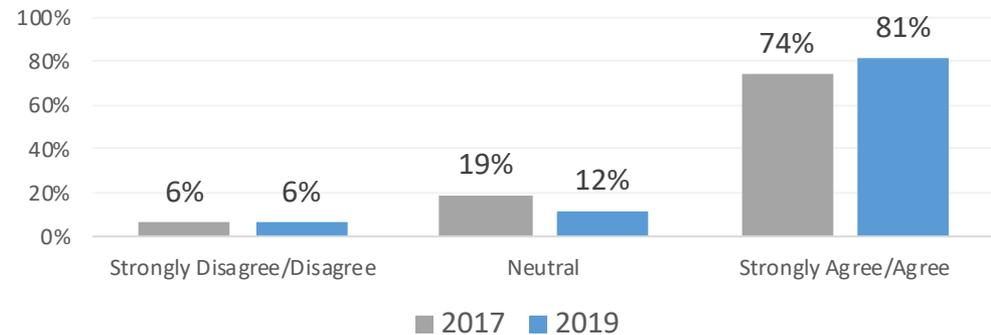
There has been slight increase in the proportion of respondents that agreed when compared to the 2017 survey.

Tourism creates shopping, restaurants and entertainment opportunities.

n=602



Tourism creates shopping, restaurants and entertainment opportunities.

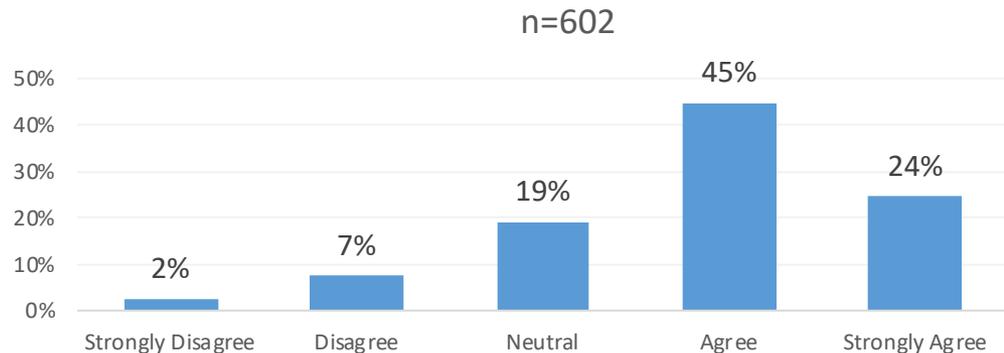


Residents Involvement

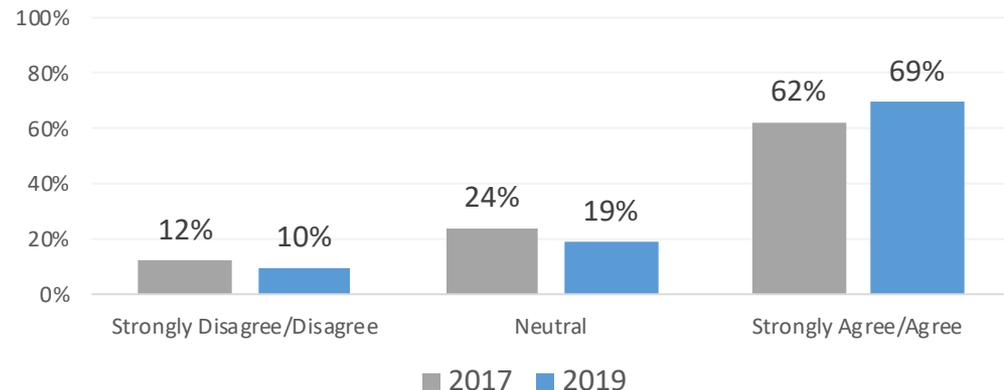
Most respondents (69%) agreed that the tourism industry provides opportunities for residents to be involved.

There was a small increase in the proportion of residents that believed the industry provides opportunities for residents when compared to 2017.

Provides opportunities for residents to be involved.



Provides opportunities for residents to be involved.



Sponsors Events for Residents & Locals

Most respondents (72%) agreed that the tourism industry sponsors festivals, activities and sports events for both locals and visitors.

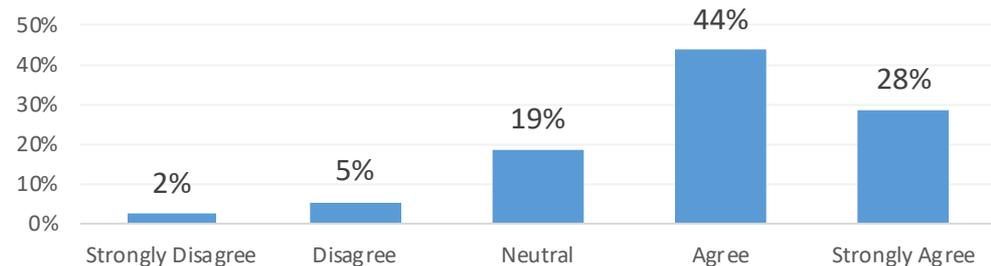
There was no significant change in opinion when compared to the 2017 survey.

Frontline Industry Supervisors Comment:

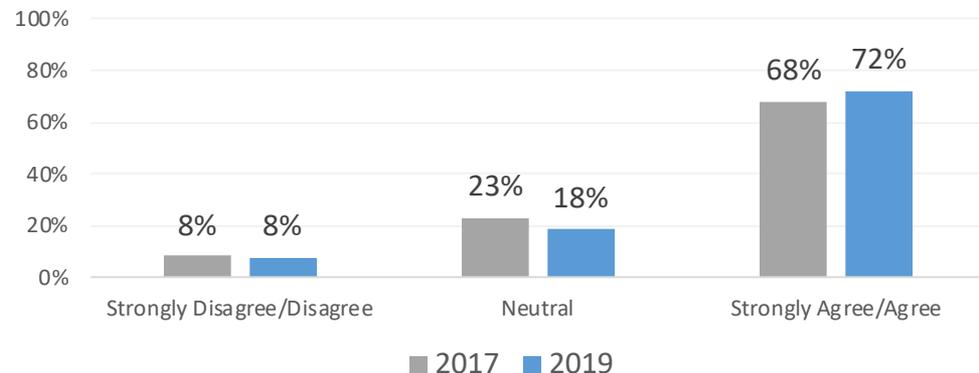
“Without tourism, there won’t be too many events.”

Tourism sponsors festivals, activities & sports events for residents & visitors.

n=602



Tourism sponsors festivals, activities & sports events for residents & visitors.



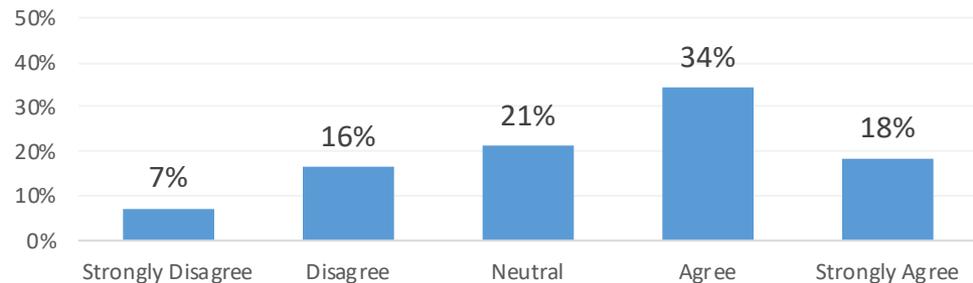
Preservation of Chamorro Culture & Language

Over half of the respondents (52%) agreed that the tourism industry helps preserve the Chamorro culture and language.

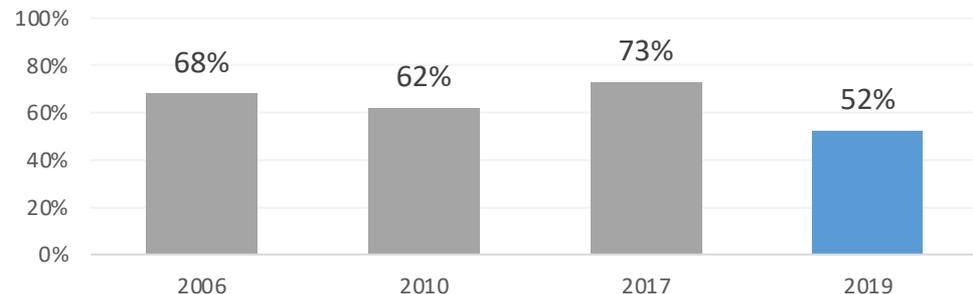
In 2017, a significantly higher proportion of residents felt that the visitor industry helped to preserve the Chamorro culture and language.

Tourism helps to preserve the Chamorro culture and language.

n=602



Tourism helps to preserve the Chamorro culture and language.



Crime Rate

Most of the respondents (62%) felt there was too much crime in comparison to other communities of similar size to Guam.

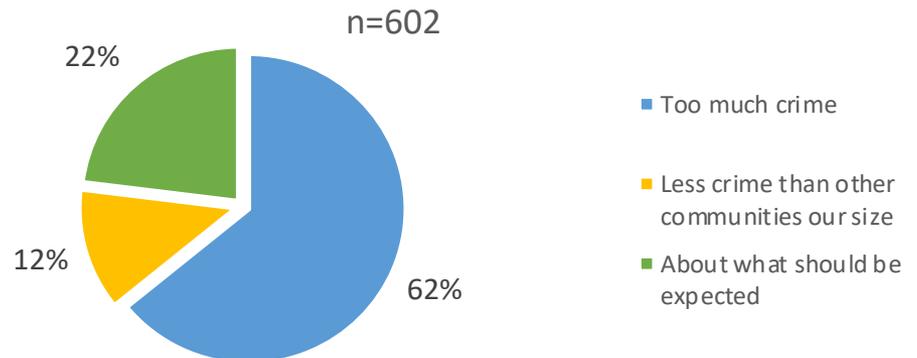
Sentiment has not changed from what was reported in 2017.

Key Industry Stakeholders Comment:

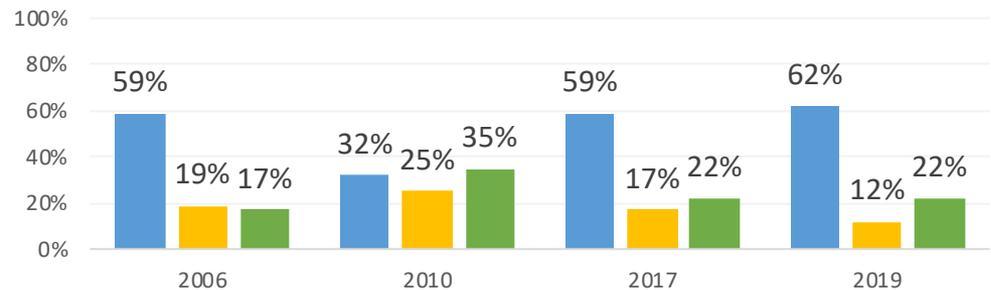
"Crime rate from 70's was high because of heroin. With concern for safety, there has been a decrease of the number of tourists that have been injured or robbed because of programs like VSO. This has helped a lot of tourists that frequent Tumon."

"There is always a chance that the crimes rates will increase."

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



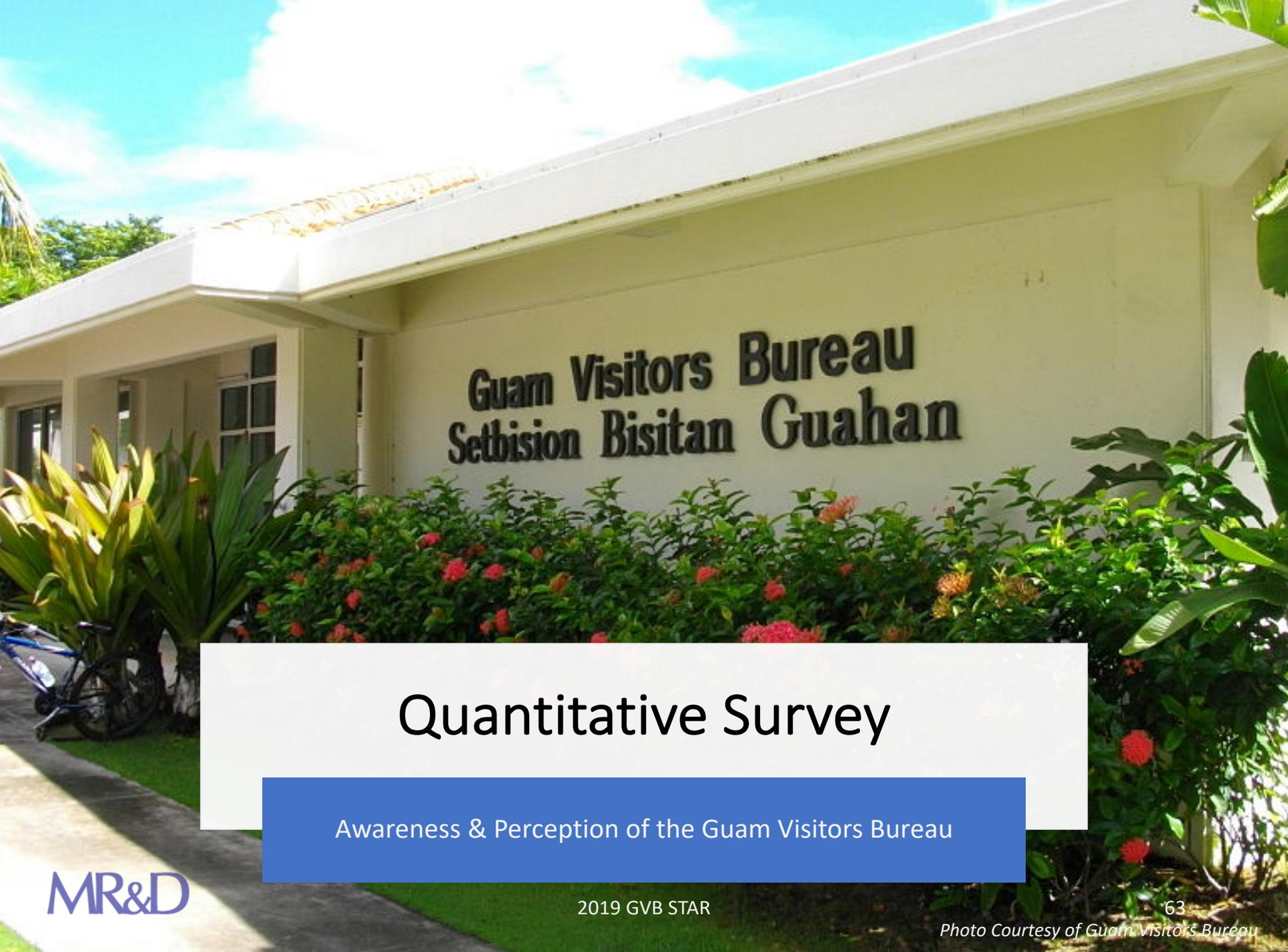
Previous responses...



General Observations: Social, Cultural & Environmental Indicators

- Most residents believed (57%) that tourism contributes to the preservation of natural resources, parks and cultural sites. A similar proportion (60%) felt the same in 2017.
- In 2019, there was a drop in the proportion of residents who believed tourism contributes to the quality of life (59%) when compared to the 2017 survey (65%).
- There was a slight increase from 62% in 2017 to 69% in 2019 that local people are provided opportunities to get involved in tourism.
- There was a slight but not significant improvement in resident's recognition that GVB is sponsoring events and activities from 68% in 2017 to 72% in 2019.
- Concerns about crime have remained about the same with 62% believing Guam has more crime than it should in 2019 and 59% feeling that way in 2017.
- A much larger change was the decline from 73% in 2017 to 52% in 2019 that tourism helps to preserve the Chamorro culture and language.

Resident feelings about how tourism is impacting the social and cultural aspects of life on Guam has remained static or has declined slightly since 2017. The biggest change has been the erosion of belief that tourism helps to preserve the Chamorro language and culture.



Guam Visitors Bureau
Setbision Bisitan Guahan

Quantitative Survey

Awareness & Perception of the Guam Visitors Bureau

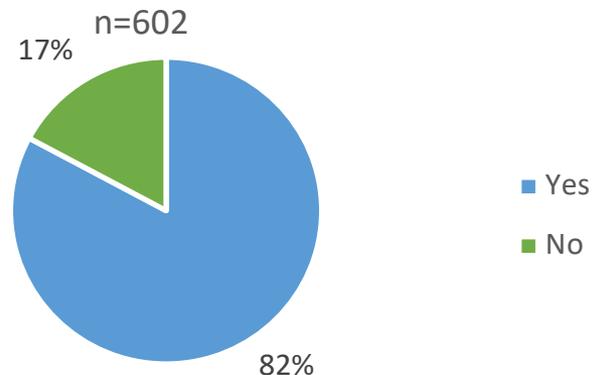
Awareness of GVB

Most residents (82%) have heard of the Guam Visitors Bureau. This has slightly improved over what was reported in 2017 (77%).

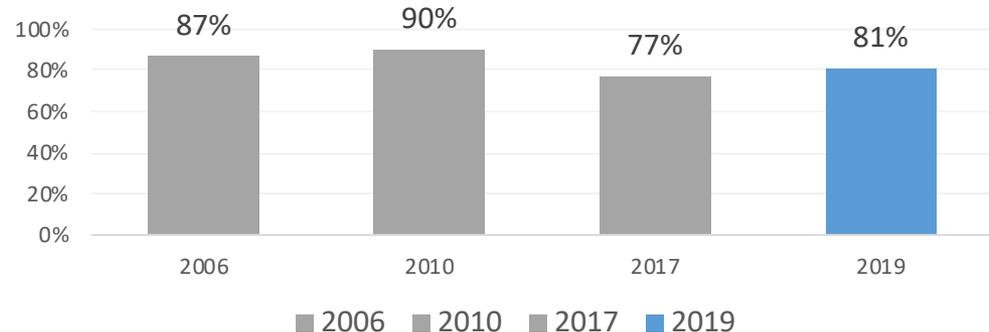
Frontline Industry Supervisors Comment:

"There are actually more advertisements out there. GVB's presence is more visible in the Guam Hotel and Restaurant Association."

Have you heard of the Guam Visitors Bureau (GVB)?



Respondents who have heard of GVB.

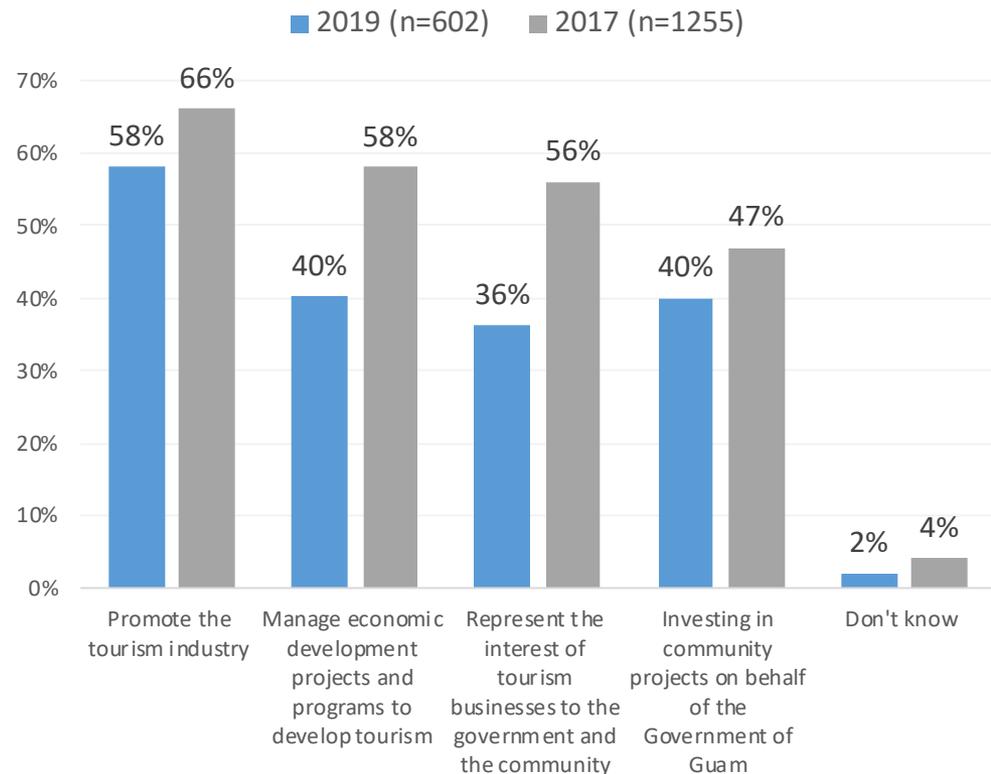


GVB Responsibilities

In 2019, residents were most likely to indicate GVB should be responsible for promoting the tourism industry (58%).

While promoting the tourism industry was also important in 2017 (66%), other responsibilities such as managing economic development projects, representing the interests of tourism businesses and investing in community project were significantly more likely to be identified as GVB's responsibility in 2017 than what was indicated in 2019.

Which of the following should GVB be made responsible for?



GVB Performance

A large majority of residents (85%) believed that GVB is doing a good job in promoting tourism. This has increased from 2017 when 77% said GVB was doing a good job of promoting tourism.

Social Media Listening:

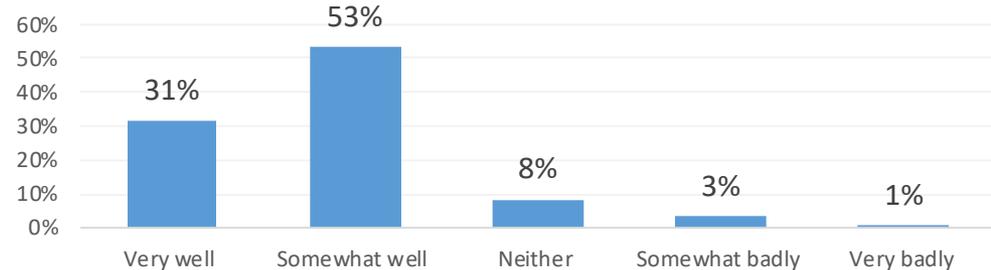
Net sentiment for GVB was around +18%, remaining at the level since December 2018.

Frontline Industry Supervisors Comment:

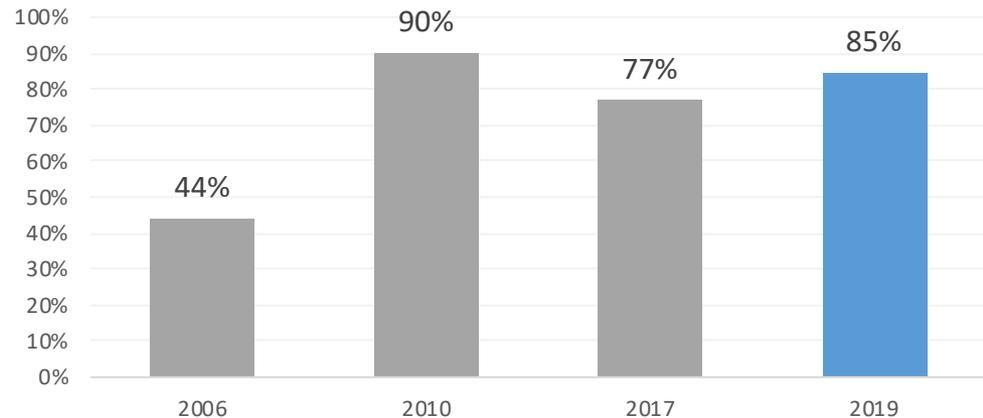
"I actually show these commercials to friends in Nebraska and my friends in Colorado and say here's the reason why you should visit Guam."

How well would you say GVB is doing in promoting Guam tourism?

n=490



GVB is doing well in promoting Guam tourism.



GVB Performance

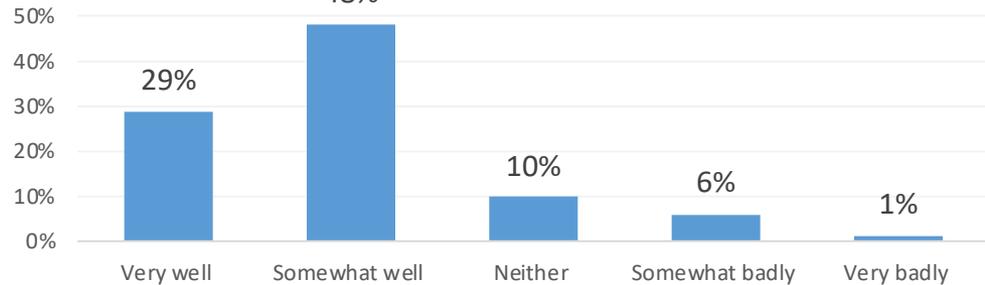
The proportion of residents that stated GVB was doing a good job in **promoting** Guam's culture increased from 2017. In 2019, seventy-seven percent (77%) felt it was doing a good job compared to 70% in 2017. This is interesting given that residents feel GVB is doing a poorer job in **preserving** Guam's language and culture, as reported earlier. More research is recommended to determine how residents differentiate promotion from preservation.

Frontline Industry Supervisors Comment:

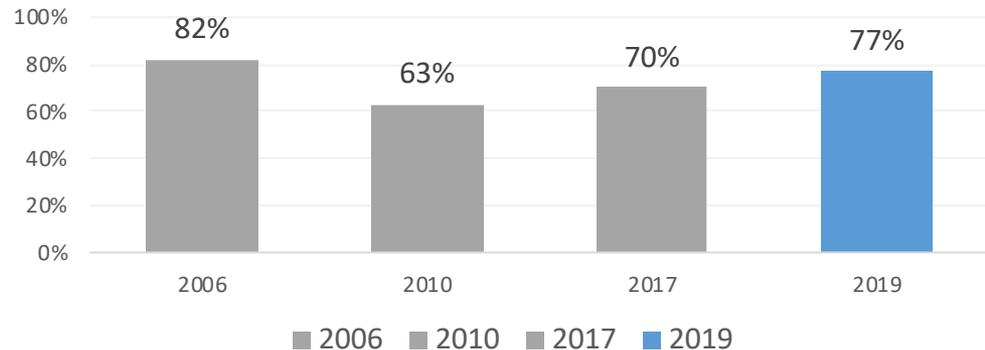
"The most common thing they [visitors] have told us is that they're actually looking for more when it comes to cultural (entertainment). There's nothing new. Even the food that we offer is always the same."

How well would you say GVB is doing in promoting Guam's culture?

n=491



GVB is doing well in promoting Guam's culture.



GVB Promotion Awareness

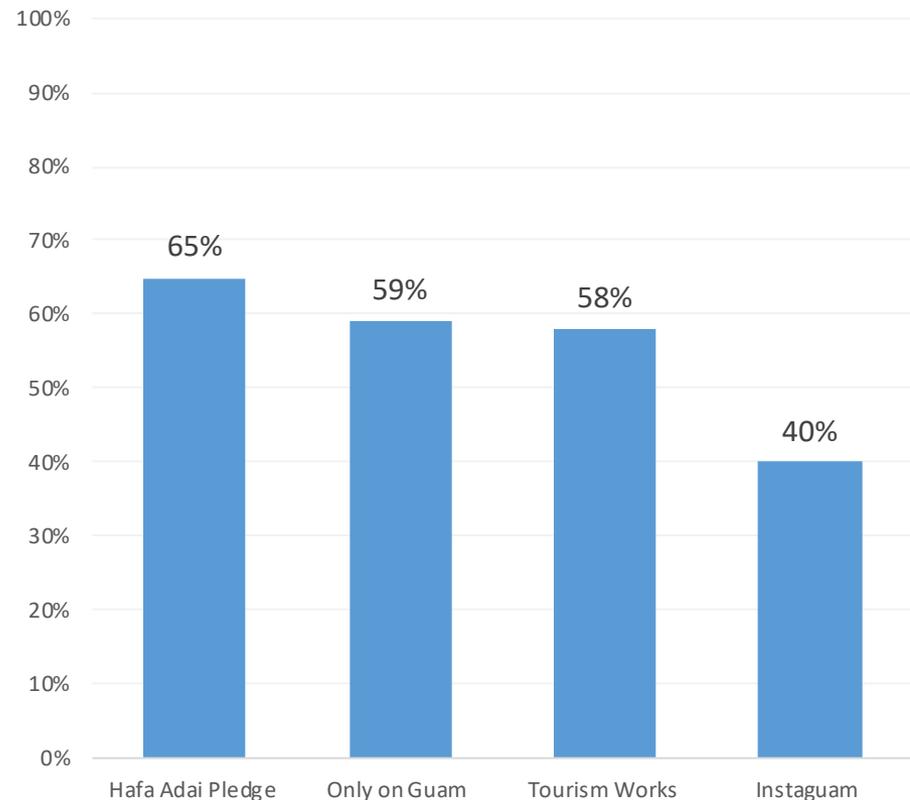
The “Hafa Adai Pledge” was the most popular promotion among respondents (65%). Most of respondents had heard of “Only on Guam” and “Tourism Works” while less than half (40%) had heard of “Instaguam”.

Frontline Industry Supervisors Comment:

“It’s [Instaguam] good but how are you guys exposing it out there? Awareness for both local and tourists. How often is it being viewed?”

Have heard of the following GVB promotions?

n=602



GVB Promotion Awareness

Sixty-four percent (64%) of respondents remembered hearing or seeing an advertisement of promotion that was from the Guam Visitors Bureau.

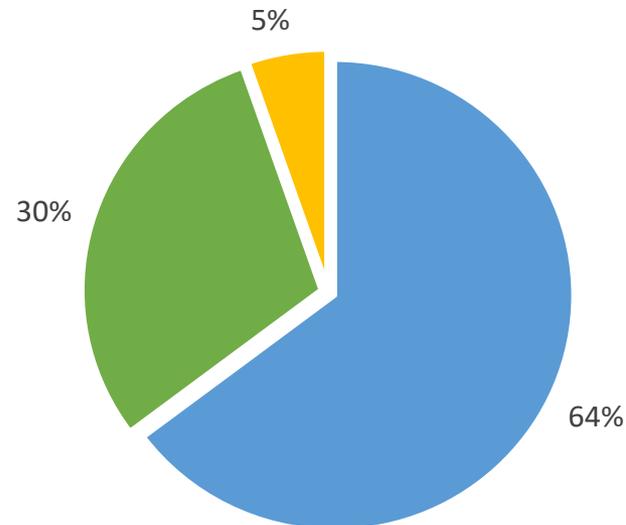
Social Medial Listening:

Discussion volume dropped sharply in December from over 200 mentions a month previously to just over 50 mentions. Mentions started to increase since then, peaking in August with over 100 mentions.

Do you remember seeing or hearing a promotion or advertisement from GVB?

n=490

■ Yes ■ No ■ Don't know



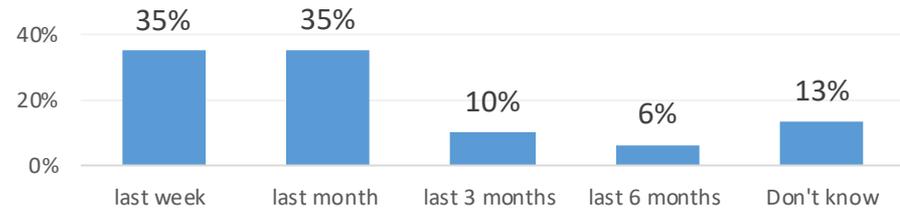
GVB Promotion Awareness

Sixty-four percent (64%) of the respondents had seen or heard a GVB promotion or advertisement either within the last week or month (35%).

Almost all the respondents who had seen or heard a GVB promotion or advertisement said that the promotion or advertisement made them feel good to be from Guam (90%).

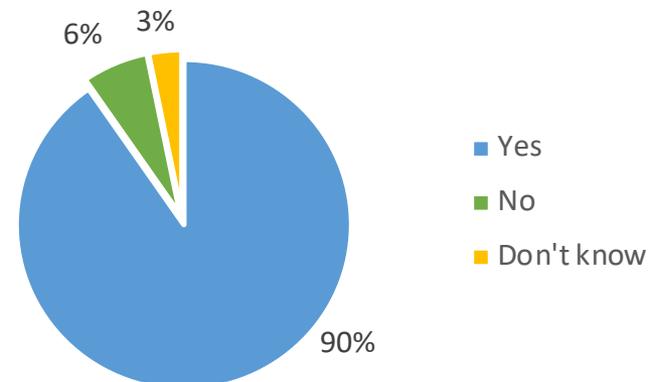
When was the last time you've seen or heard a promotion or advertisement from GVB?

n=313



Thinking back on the promotion or advertisement that you've seen or heard from GVB, does it make you feel good to be from Guam?

n=313



GVB Promotion Awareness

Most of the respondents who had seen or heard a GVB promotion or advertisement believed that GVB's promotion of Guam is helping to promote island pride (87%).

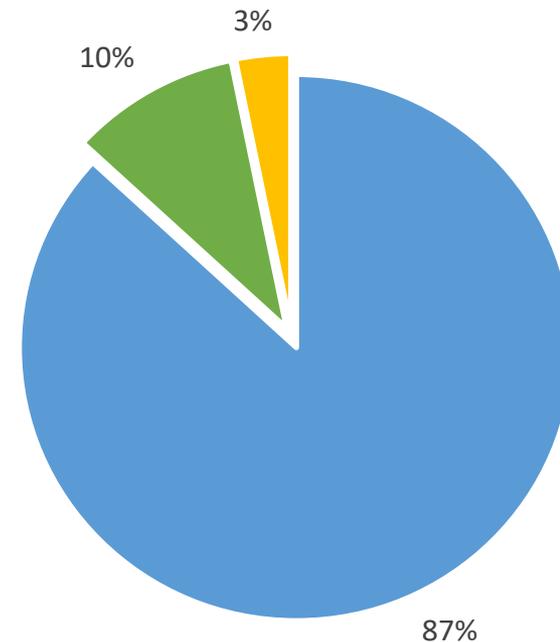
Frontline Industry Supervisors Comment:

"I'm satisfied. I've seen commercials. I've seen the hard work that gets put into them. Wonderful job!"

Do you believe that GVB's promotion of Guam is helping to promote island pride?

n=314

■ Yes ■ No ■ Don't know



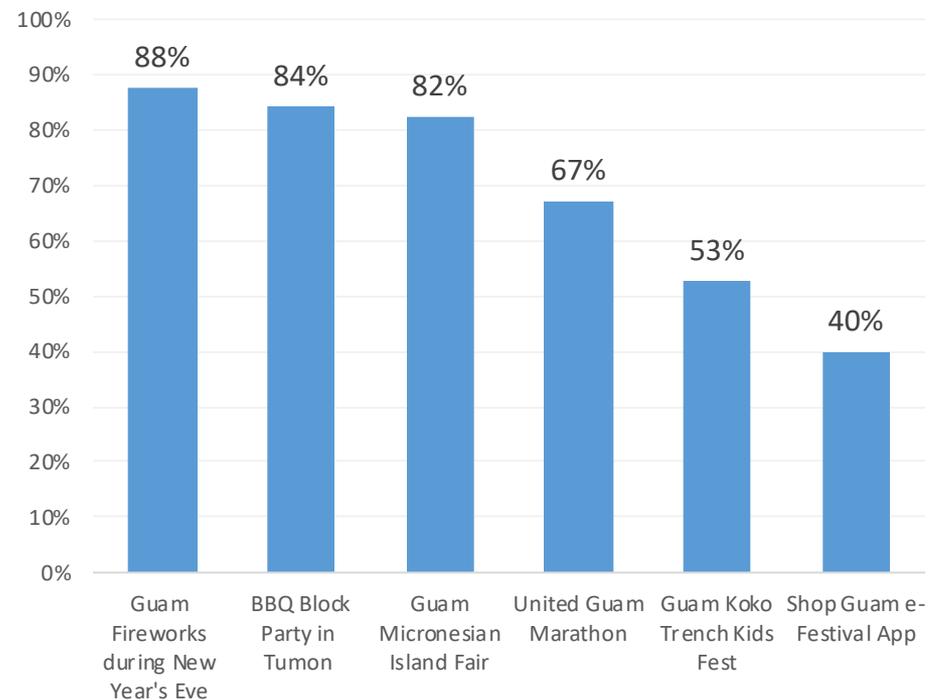
GVB Signature Events Awareness

GVB's most heard of signature events among residents were the New Year's Eve fireworks (88%), BBQ Block Party (84%) and Guam Micronesian Island Fair (82%). Most respondents (67%) had heard of the United Guam Marathon and slightly more than half (53%) had heard of the Ko'Ko' Trench Kids Fest while less than half (40%) had heard of the Shop Guam e-festival app.

Social Medial Listening:

The most popular events managed/coordinated by GVB was the **K-POP Guam Concert** (664 mentions), the **75th Liberation** (299 mentions), and the **BBQ Block Party** (77 mentions). These events greatly stimulated discussion of tourism and GVB's organizational role.

Have heard of the following GVB signature events?
n=602



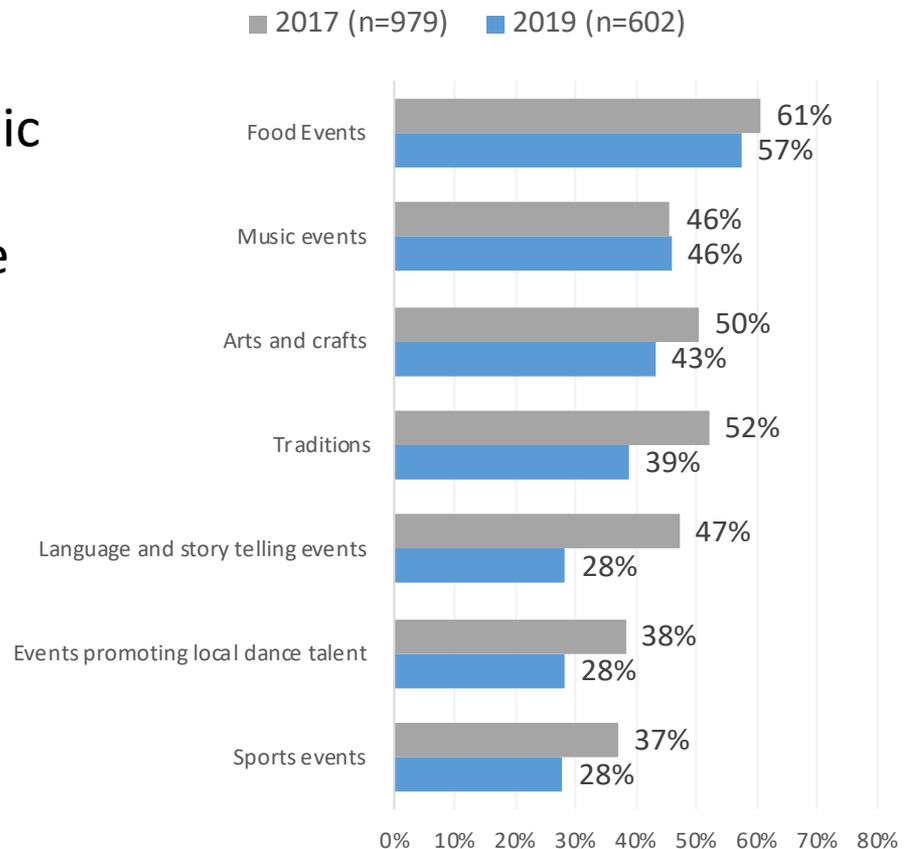
Future GVB-Sponsored Events

Most of the respondents stated they would participate in food events (57%) in the future. Fewer would participate in music events (46%), arts and crafts (43%), and events that promote traditions (39%).

Frontline Industry Supervisors Comment:

"They're [visitors] always asking where [New Year's Eve Fireworks] the location is. It sometimes changes. Just keep it in Tumon."

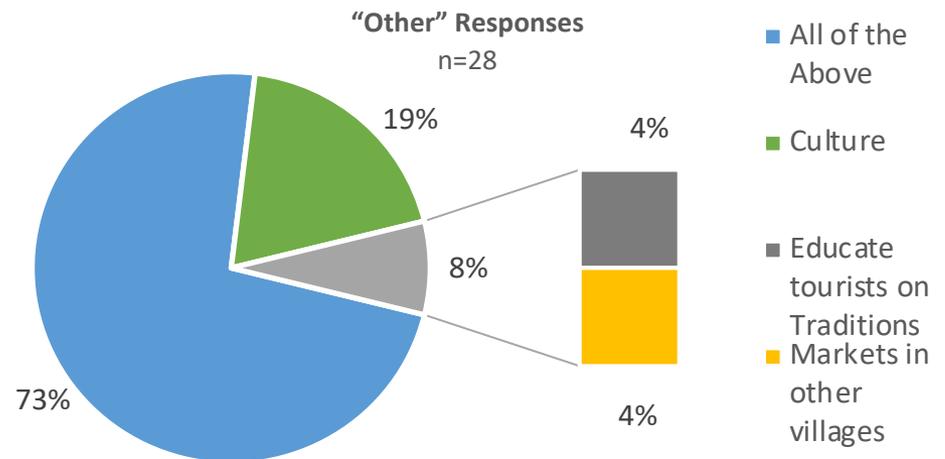
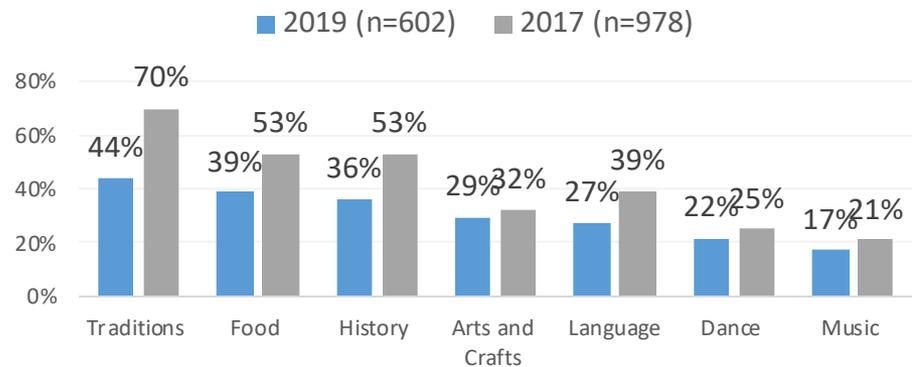
Thinking of community events GVB might sponsor in the future, in which ones would you participate?



Top Cultural Elements of Guam

When asked what items should be promoted to visitors, Traditions (44%), Food (39%) and History (36%) were the most important items that respondents thought GVB should promote.

What are the most important items that GVB should promote in presenting Guam's culture to visitors?



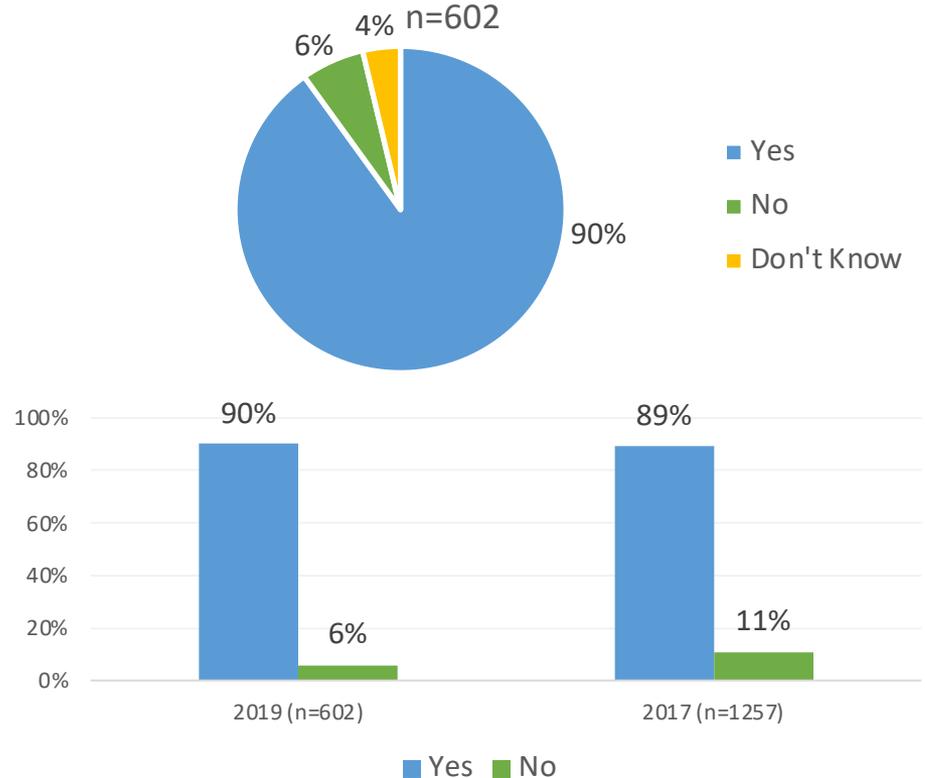
Development Outside of Tumon

Majority of the respondents (90%) felt there should be more tourism-related opportunities and businesses outside the Tumon area.

Key Industry Stakeholders Comment:

"There is a larger number of people coming in, visitors going outside of Tumon in Airbnb's, visiting places in the south using GPS."

Do you think there should be more tourism-related opportunities and businesses outside of the Tumon Bay in general?



Development in Southern Region

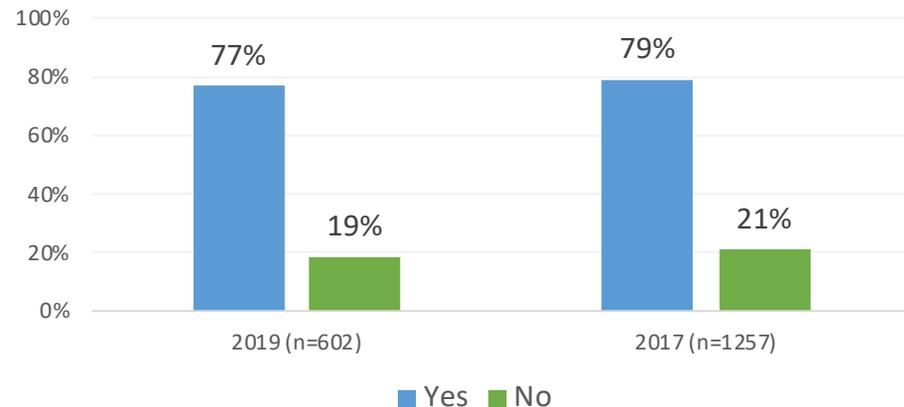
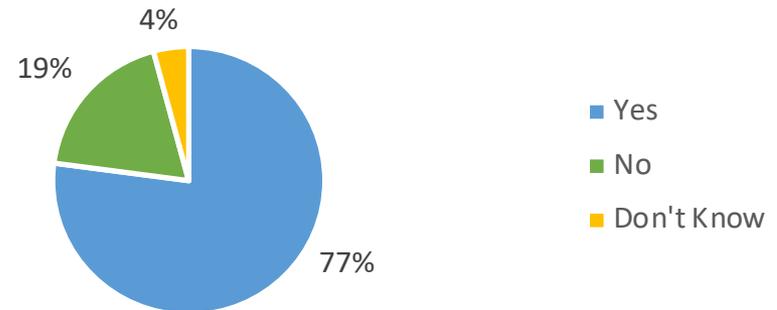
More than three-fourths of residents (77%) felt that there should be more tourism-related opportunities in the southern region of the island.

Key Industry Stakeholders Comment:

"There was this motion to build up Inarajan as a cultural destination and there was all of this opportunity building including jobs and more based on our culture."

Do you think there should be more tourism-related opportunities and businesses specifically in the Southern region of the island?

n=602



HOT BOND Project

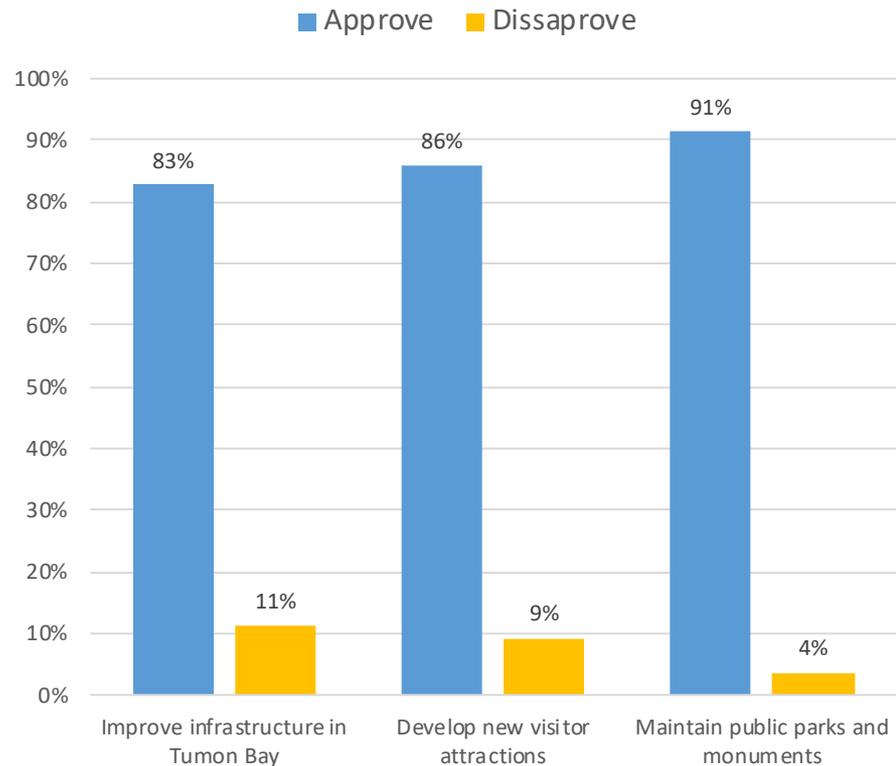
Most residents approved of the use of hotel tax revenue for developing projects, especially the maintenance of public parks and monuments (91%).

Key Industry Stakeholders Comment:

"GVB needs to be stronger about not letting those functions that are non-tourism related in the TAF funds!"

Do you approve or disapprove of the use of hotel tax revenue for developing projects such as these?

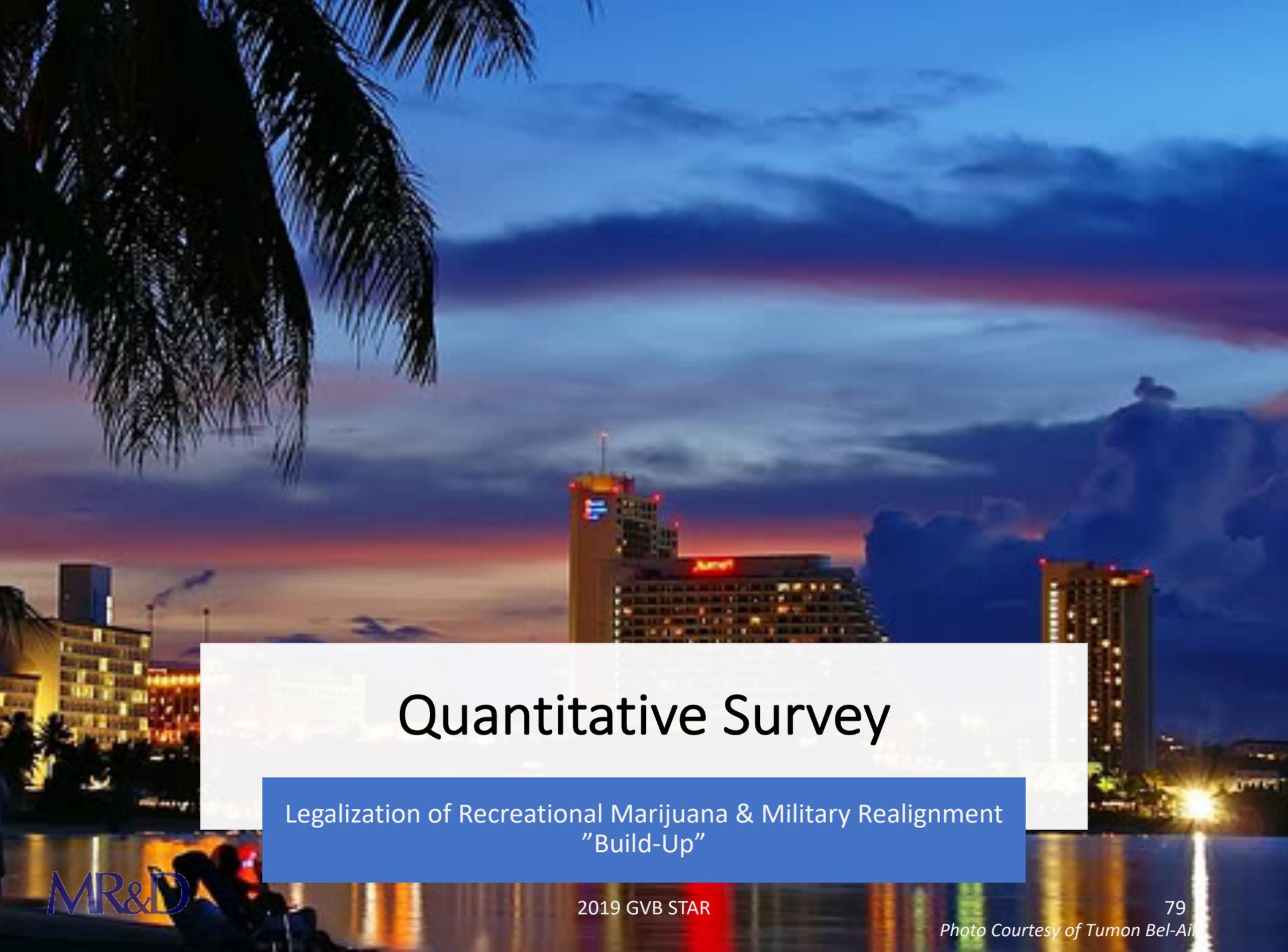
n=602



General Observations: Guam Visitors Bureau

- Resident's awareness of GVB has increased slightly from 77% in 2017 to 82% in 2019.
- Residents also believed that GVB should concentrate on promoting tourism (58%). In 2019, less than half believed that GVB should be made responsible for managing economic development projects (40%), investing in community projects (40%) for the government or representing the individual interests of tourism businesses (36%). In 2017 residents were significantly more likely to agree on what GVB should be responsible for .
- Overall, residents believed GVB is doing a good job promoting Guam's tourism (85%), up from 77% in 2017.
- Residents also believed that they are doing a better job in "promoting" Guam's culture, even though residents in 2019 felt GVB was not doing as well in "preserving" Guam's culture and language as they did in 2017.
- The most remembered GVB promotion was the "Hafa Adai Pledge" (65%).
- Overall, the same proportion (64%) had seen or heard a GVB promotion in the last month, and 90% indicated that the promotion or advertisement made them proud to be from Guam, and 87% indicated that ads and promotions promoted "island pride."
- Residents would like to participate in more food events, music events, and crafts events. They believed GVB should promote Guam's traditions, food and history to visitors.
- Nearly all residents (91%) would like to see tourism developed outside of Tumon, three quarters (77%) believed that tourism should be developed in the south. Nearly all residents believed that the Hotel Occupancy Tax revenue bonds should be used to finance maintenance of public parks and monuments (91%), develop new attractions (86%) and improve infrastructure in Tumon (83%).

Residents overwhelmingly believe GVB is doing a good job promoting tourism. Though they are less impressed in what is being done to "preserve" the Chamorro culture and language, they are doing a better job in "promoting" Guam's culture. The ads and promotions GVB conducts make residents proud to be from Guam and believe GVB is promoting island pride. Nearly universally, residents believe tourism should be developed outside of Tumon and that HOT Bond revenues should be used to fund maintenance of parks, develop new attractions and improve the infrastructure of Tumon.

A nighttime photograph of a city skyline reflected in water. The sky is a deep blue with some clouds. Several buildings are lit up, with one prominent tower in the center. Palm tree fronds are visible in the upper left corner. The water in the foreground shows clear reflections of the city lights.

Quantitative Survey

Legalization of Recreational Marijuana & Military Realignment
"Build-Up"

Legalization of Recreational Marijuana

Slightly more than half of the respondents supported the legalization of recreational marijuana on Guam (51%).

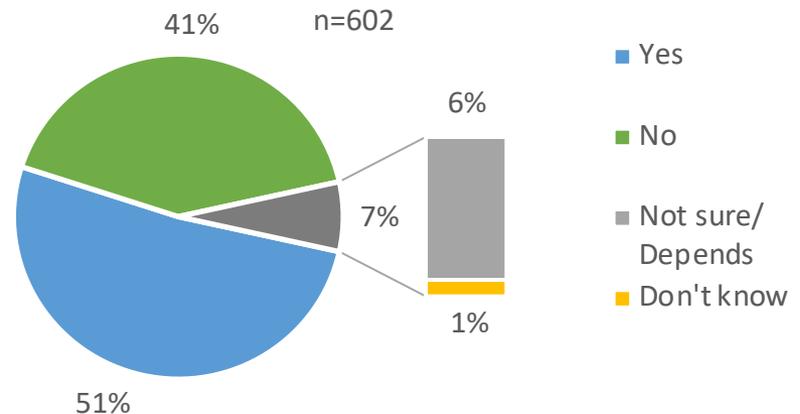
Less than half (44%) of the respondents felt that legalization of recreational marijuana will help the tourism industry while a third (30%) felt that it will hurt the tourism industry.

Key Industry Stakeholders Comments:

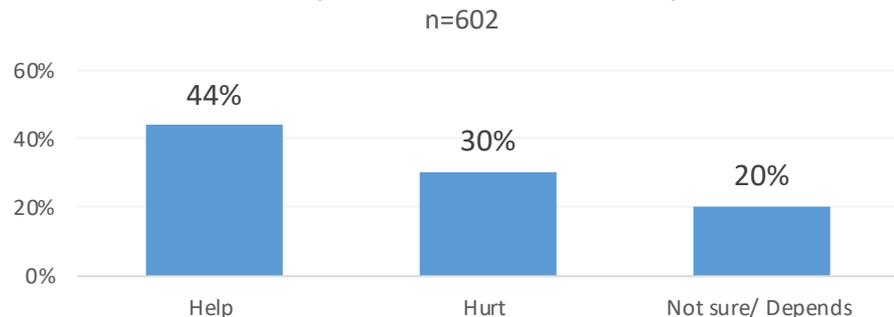
"Personally I think there is a great opportunity here, but we should proceed with caution."

"There is so much more I want Guam to be known for rather than just the marijuana island, we have fitness, food culture and other aspects."

Do you support the recent legalization of recreational marijuana on Guam?
n=602



Do you feel that the legalization of recreational marijuana will help or hurt the tourism industry?
n=602



Military Realignment

Most of the respondents (63%) supported the military build up while a quarter do not support it.

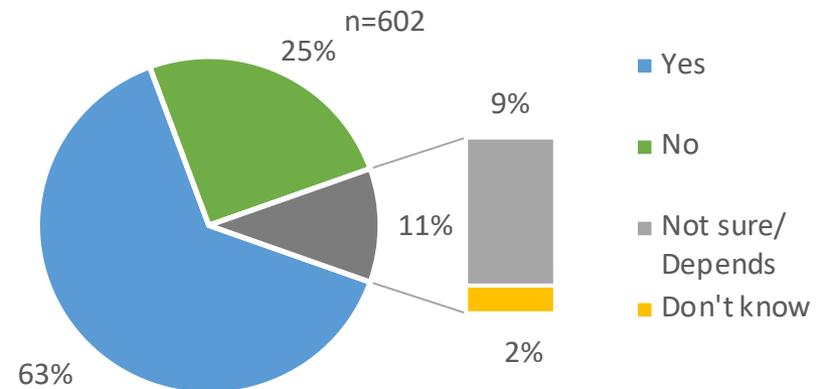
More than half (51%) of the respondents felt the military realignment will help tourism, while nearly a quarter (24%) were unsure.

Key Industry Stakeholders Comments:

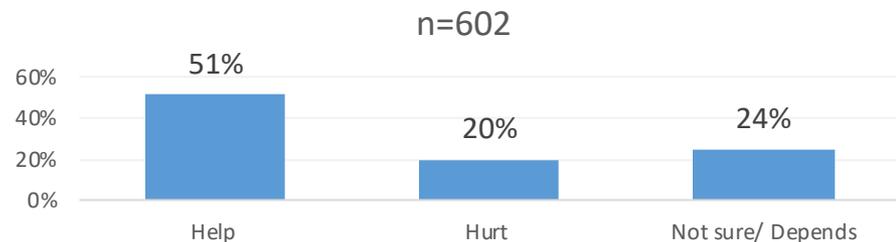
"Not only do they [military] bring more safety, but they benefit our infrastructure."

"The military do exercises and do not care what season it is and it's a bad view for tourists."

Do you support the military realignment, known as the buildup, on Guam?



Do you think the pending military realignment or buildup will help or hurt tourism on Guam?

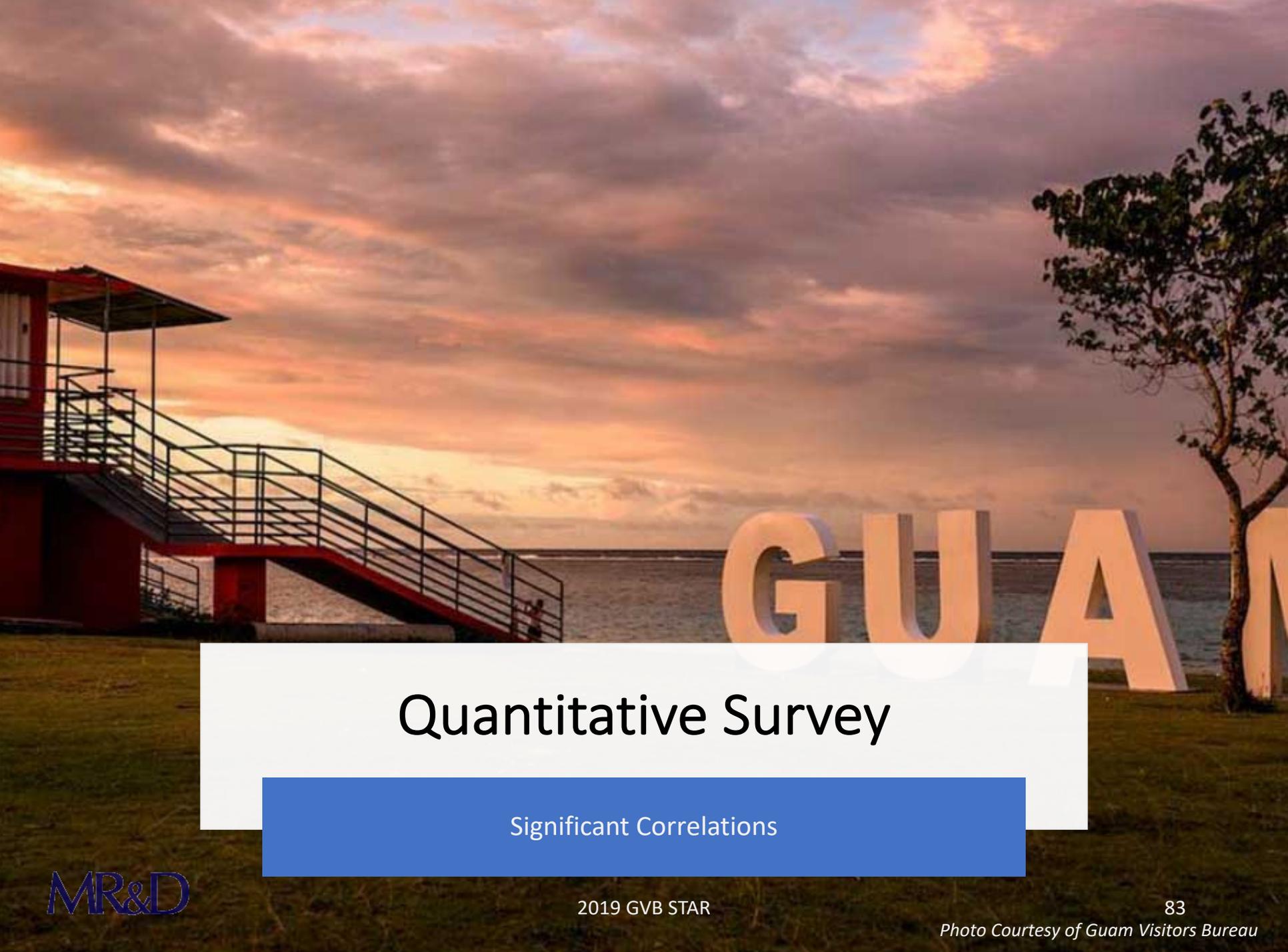


General Observations:

Legalization of Recreational Marijuana & Military "Build-Up"

- Residents are split on their support of the legalization of cannabis with 51% who supported the new law and 41% who opposed and the rest being unsure. Less than half (40%) felt it will help the industry and 30% believed it may harm tourism with 20% who were unsure.
- Residents are more supportive of the military buildup. Nearly two-thirds (63%) stated that they support the military buildup but only 51% believed it will help the tourism industry with 20% believing that it will hurt the industry and a further 24% indicated they were not sure how it effects the industry.

Residents are not sure how the new cannabis law and the military build-up will impact tourism. Given the magnitude of the impact each could have on the industry, GVB should help inform residents of its position. It is likely that GVB will be persuasive given the confidence residents have in GVB's ability to promote tourism.



Quantitative Survey

Significant Correlations

Statistically Significant Testing

The results presented thus far represent the attitudes of all of those interviewed. To better understand the context of the results, all the demographic and economic characteristics of residents that were measured were cross tabulated with all of subjects asked about. This is a first step in helping to understand the drivers of residential attitudes.

Four demographic characteristics were found to have statistically significant associations with the items measured in the survey: Age, Ethnicity, Industry Workers and Voters. To determine if these statistically significant associations were strong enough to provide meaningful additional information, Cramer's V tests were conducted to determine the strength of association between variables. Cramer's V was used because of its robustness in measuring different types of variables.

The results indicated that only two variables had associations with items that could be classified as stronger than weak or very weak. The two characteristics were whether the resident worked in the visitor industry or was a registered voter.

The findings are listed in the following slides in order of strongest association.

Industry Workers (n=123)

Benefits

- Thirty-five percent (35%) of those who do not work in the industry disagreed that employment benefits in the tourism industry are better than other jobs, while nearly double that (64%) of respondents who work in the industry felt the same. *Chi Square Sig. 0.000; Cramer's V 0.260*

Visitors

- Fifty-six percent (56%) of respondents who work in the industry felt there are not enough visitors annually compared to 36% of all residents. *Chi Square Sig. 0.000; Cramer's V 0.238*

Tourism Contributions

- Sixty-six percent (66%) of industry workers agreed that tourism helps preserve the Chamorro culture and language, while only 52% of all residents feel that tourism helps preserve the Chamorro culture and language. *Chi Square Sig. 0.000; Cramer's V 0.234*

Observations

The perceptions of visitor industry workers regarding the benefits provided by the industry differ from the perception of all residents. Industry workers are significantly less likely to believe that the benefits of the industry are better than industries on Guam. Likewise visitor industry workers are more likely to feel Guam needs more visitors than residents and are significantly more likely to feel GVB is doing a good job preserving the Chamorro culture and language.

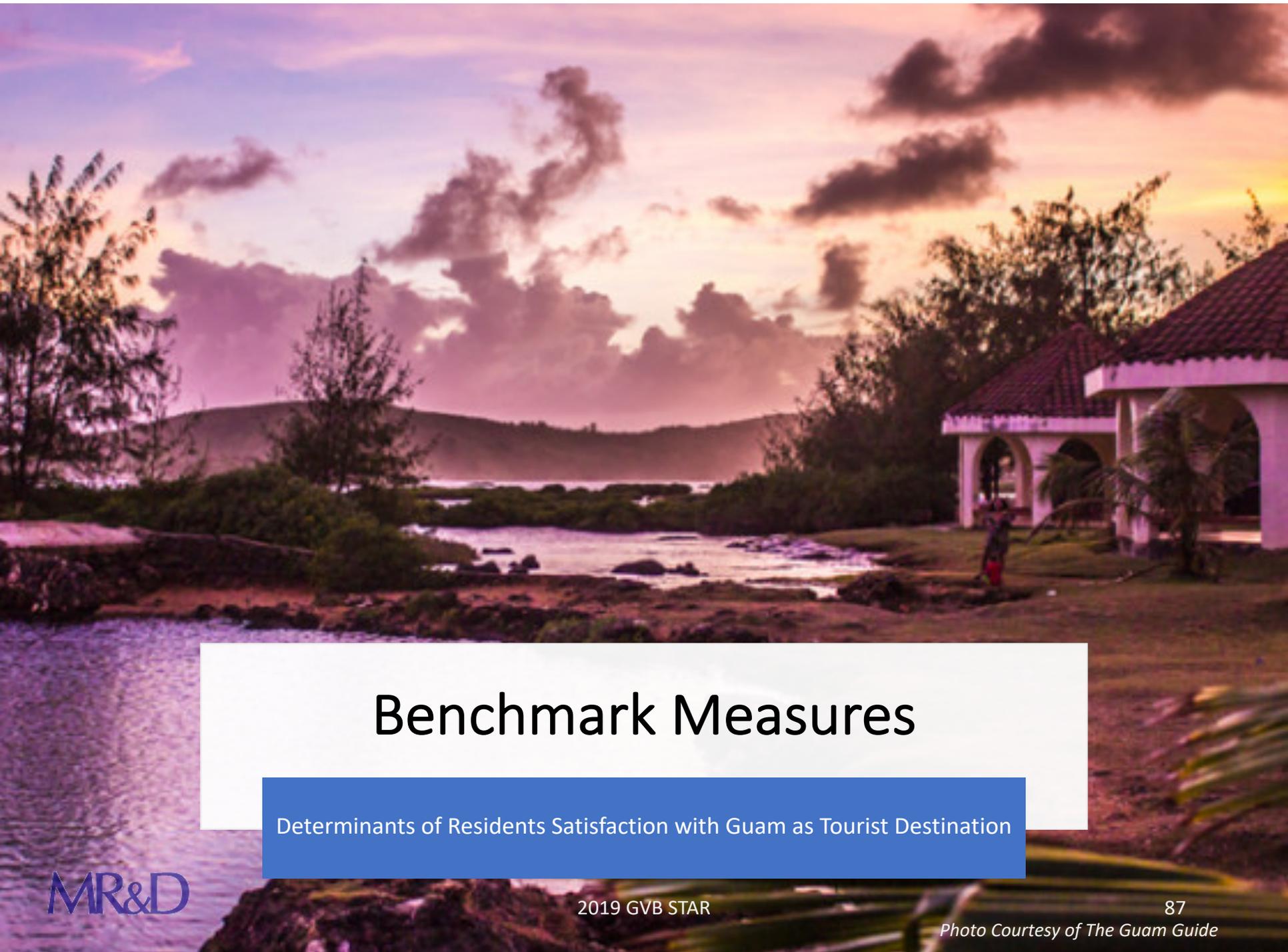
Registered Voters (n=462)

GVB Awareness

- Eighty-five percent (85%) of registered voters were aware of GVB, while only 68% of nonregistered voters were aware. *Chi Square Sig. 0.000; Cramer's V 0.200*

Observation

GVB's image and brand remains closely aligned with the Government of Guam. Also, people that are not registered to vote are more likely to have been on Guam a shorter period of time and less aware of issues of importance to Guam.



Benchmark Measures

Determinants of Residents Satisfaction with Guam as Tourist Destination

Determined Measures

The research team requested that a series of benchmark measures be developed from the results of the survey. These benchmarks would provide a metric by which the GVB could easily measure its performance during the current survey period against prior surveys. The research team will be working with the board and strategic planning team to determine a final set of benchmarks or indices that should be used.

In the meantime MR&D included in Focus Group Two (Key Industry Stakeholders) a discussion regarding which benchmarks should be used. Four benchmark measures were identified. Measures of residents' attitudes regarding:

- Safety and Security
- Cost of Living
- Improved Infrastructure
- Diversity of Attractions

In the development of the Quantitative Survey, questions were asked determine the public's current perceptions of these measures.

Benchmark Design

The draft or preliminary benchmarks were devised by creating a simple index for each variable selected for inclusion. For the “safety and security” benchmark and for the “diversity of attractions” benchmark only one variable was used to create the index.

For the “cost of living” and the “improved infrastructure” benchmarks, multiple variables were combined to create a single new measure that incorporated all the variables utilized.

No effort has been made to set targets for each of the benchmarks, only to identify what they are, based on this most recent survey. Those targets and a final determination of the measures to be used should be determined by the strategic planning team.

Benchmark Design Measures

Safety & Security

- Understanding that all communities have crime to some degree, do you think Guam has too much crime, less crime than other communities our size or about what should be expected?

Standard of Living

- Over the last twelve months, do you think Guam's economy has gotten better, stayed the same or gotten worse?"
- In the last year has your standard of living gotten better, stayed the same or gotten worse?
- Do you think without Tourism the standard of living on Guam would be less?

Infrastructure

- Do you approve or disapprove of the use of hotel tax revenue for developing project such as these:
 1. Improve Infrastructure in Tumon Bay
 2. Develop new visitor attractions
 3. Maintain Public Parks and Monuments

Diversity of Attractions

- I'd like you to tell me how strongly you agree or disagree with: "Tourism creates shopping, restaurants and entertainment opportunities?"

Benchmarks

When each measure was converted into an index that ranged from 1 to 100, where 1 represents the lowest score possible and 100 the highest score....

Safety & Security- 50

Standard of Living- 75

Infrastructure- 96

Diversity of Attractions- 80

- Residents rated the amount of crime on Guam when compared to other jurisdictions lowest when compared to the other measures. Residents are concerned about the level of crime on Guam. (**Score: 50 out of 100**)
- Residents generally believed that the standard of living has improved or stayed the same and that tourism is contributing to the standard of living on Guam (**Score: 75 out of 100**)
- Residents resoundingly agreed that HOT Bond revenues should be spent on improving infrastructure in Tumon Bay, developing new attractions and maintaining parks and monuments. (**Score: 96 out of 100**)
- Residents also strongly agreed that tourism is contributing to the diversity of attractions, restaurants and events on Guam (Score: **80 out of 100**).

Survey on Tourism Attitudes of Residents on Guam (STAR): Focus Group 1 (Frontline Supervisors)



GUAM

October 2019

**Prepared for the Guam Visitors Bureau
by Market Research & Development, Inc.**

Research Background

Market Research and Development, Inc. (MR&D) was contracted by the Guam Visitors Bureau (GVB) to conduct three Surveys of Tourism Attitudes of Residents (STAR) in order to identify the kinds of measures that could be used as a metric for estimating success of the agency. The first was conducted in 2016. The next STAR survey is scheduled in October 2019. To help design the questionnaire for the upcoming STAR survey, a focus group discussion was conducted with tourism industry frontline supervisors.

Research Objectives

The questionnaire for the next STAR survey will be based upon the significant findings of two focus group discussions (FGD). The first was conducted among tourism industry frontline supervisors who have daily contact with visitors. The second will be conducted after the first discussion and will include industry stakeholders. Both will be used to develop a questionnaire to identify drivers of public opinion and key measures of performance that GVB should be using to determine success. Identify how respondents perceive visitors feel about Guam

Research Objectives

Specifically, the objectives of the first group were to obtain the following information among tourism industry frontline supervisors who have regular contact with tourists:

1. Identify how respondents perceive visitors to feel about Guam
2. Explore how respondents feel about visitors from each source market
3. Identify what respondents believe are the most important issues regarding tourism
 - i. Impacting work
 - ii. Impacting the lifestyle of those that work in the industry and the general community
4. Explore how the respondents view the opportunities for better wages and advancement provided through tourism
5. Identify how well respondents believe GVB is doing in marketing Guam
6. Determine how respondents feel GVB is doing in marketing Guam
7. How respondents feel about availability of public transportation and if a lack of public transportation creates problems for them as visitor industry workers
8. Identify how respondents perceive the impact of the military buildup have on the visitor industry
9. Explore how respondents perceive the impact of the legalization of marijuana will have on the visitor industry.

Method

- The FGD was conducted in the conference room of MR&D on September 19, 2019 at 5:30pm. It comprised of 8 tourism industry frontline supervisors. Specifically, there were 5 from hotels, 2 from an optional tour, and 1 from retail. The ages ranged between 25-50 years. Of the 8, there were 6 females and 2 males. The participants of the focus group included:

	Gender	Company
Respondent 1	Female	PIC
Respondent 2	Female	PIC
Respondent 3	Female	Hilton
Respondent 4	Female	Nikko Hotel
Respondent 5	Male	Valley of the Latte
Respondent 6	Female	DFS
Respondent 7	Female	Fiesta Resort
Respondent 8	Male	Valley of the Latte

- The focus group was facilitated by Dr. Fred Schumann and were observed by GVB staff. The discussion lasted for 2 hours.

Summary of Findings

- Visitors are **excited** to go to Guam. They like Guam's **beach and ocean environment, people, culture, and overall relaxing environment**. Negative comments were **hot weather, mosquitoes, and lack of variety in food and cultural entertainment**.
- Korean visitors were described as “complainers”, Japanese visitors as “good customers” and “disciplined”, Chinese and Taiwanese visitors as “bargain hunters” and Filipinos as “shoppers”.
- Top 3 important aspects in the tourism industry affecting the respondents' work are: **1) Jobs, 2) Money, and 3) Friends and relationships**. Top 3 important aspects in the tourism industry affecting respondents' lifestyle are: **1) Ability to live comfortably, 2) Seasonality, and 3) Events/ places/ businesses**.
- Suggestions to improve perception on safety on Guam were: **1) Relocate the homeless in Tumon, 2) Provide more security officers in Tumon, and 3) Improve the lighting in Tumon**.

Summary of Findings

- The respondents believe that the tourism industry provides opportunities for better wages and advancement such as management and apprenticeship programs. However, the tourism industry workers are less compensated compared to their counterparts in other beach destinations.
- Overall, the respondents are satisfied with GVB's performance in marketing Guam. They noticed its improved visibility compared to the past 5 years. Top-of-mind, they mentioned **Hafa Adai Pledge, trade shows, and Tourism Works!** to be GVB's successful efforts in the past year while **village fiestas and Ypao night market** were short lived.
- The GVB initiated event that stood out was the Guam Micronesia Island Fair (GMIF) because it brings people together. They felt that GVB should put more effort in to cultural events and night life.
- Respondents felt that it is important to improve the public transportation system on Guam in the aspects of efficiency, reliability, and affordability, especially for tourism industry workers to utilize.

Summary of Findings

- Military's presence was viewed to improve the economy, particularly the visitor industry, through the military's spending, which increases businesses' sales and revenue.
- More respondents thought that legalization of marijuana has more adverse than good effects. Despite the benefit of more taxes and more jobs, they are concerned about control and regulation, health of marijuana smokers (both locals and tourists), addiction, and crime rate.

Principal Findings



Respondents' Perception on How Visitors Feel About Guam: Positive comments

- In general, respondents indicated that visitors are *“excited”* about Guam. It is a **beach destination** that takes them away from their everyday lives. It is also much easier to travel to than other beach destinations such as Hawaii.
 - *“It’s a new place.”*
 - *“They’re returning because they had good experiences.”*
 - *“It’s a beach destination that’s easier to reach than Hawaii.”*

Respondents indicated that visitors also like the **people, shopping, culture**, and the **overall relaxing environment** on Guam. For them, a stay in Guam is a respite from the busy city.”

- *“Relaxing. It’s not the same as being in the city.”*

All these reasons motivate repeat visitors to come back to Guam as well as their desire to **visit friends** they have made on Guam during previous stays.

Respondents' Perception on How Visitors Feel About Guam: Negative comments

- Respondents indicated that visitors have complained about the **hot weather** and **mosquitos** on Guam, especially with the recent cases of dengue fever. They also indicated that repeat customers, especially from the Japan market, expressed a **desire for more variety of things to do**. Specifically, a greater variety of food and cultural entertainment aside from the usual choreography they see in the Polynesian dance.
 - *“They most common thing they have told us is that they’re actually looking for more when it comes to cultural (entertainment). There’s nothing new. Even the food that we offer is always the same.*
 - *“They’re beginning to feel concerned about their safety. A lot of things have happened on Guam. It affected the trust of the tourists that are coming here. It’s how the news come out there. What is the guarantee for their safety. It’s one of the biggest concerns nowadays.*

Respondents' Perception on How Visitors Feel About Guam: Top of Mind Associations

Koreans

- *"Flooded Rooms. In Korea, the way their bathrooms are set up, everything is open. They take a shower anywhere in the bathroom."*
- *"Loud"*
- *"Complainers"*: They express significantly more complaints than visitors from other countries.
- *"Love for compensation. If they're able to get it for free, they will"*: They are not satisfied with a simple apology but rather, they expect to be compensated for what they perceive to be an unsatisfactory experience.

Japanese

- *"Good customers"*
- *"Disciplined"*

Chinese and Taiwanese

- *"bargain hunters", "They want the cheapest rate."*

Filipinos

- *"shopping"*

Respondents' Perception on How Visitors Feel About Guam: Source markets that strongly influence the visitor industry

- Primary source markets that the respondents mentioned:
- Korea, Japan, and Taiwan
- Other source markets mentioned:
- US Military, Philippines, and a few from Russia
 - *“Filipino visitors the green card holders and they come to Guam whenever they have to renew their green card. At the same time, they go to us to do optional tours while waiting for their appointment with immigration.”*
 - *“They’re (Russians) having problems now with the visa. I think it’s going to stop”.*

Respondents' Perception on How Visitors Feel About Guam: Comparisons among source markets

Japanese	Koreans
<ul style="list-style-type: none"> ○ More “stable” than Korean visitors <i>“Our Japanese guests were so surprised to see increasing Korean people. They say its so different from before.”</i> ○ Stay in one hotel for at least 4 nights straight ○ They understand the value of services and are willing to pay extra for them 	<ul style="list-style-type: none"> ○ Increased in number compared to the past years ○ Inclined to use Airbnb more ○ They hop to different hotels ○ Rent cars from local Korean residents ○ More budget conscious <i>“They don’t want to pay extra for service.”</i> <i>“They love coupons.”</i> ○ Rely on blogs more
<ul style="list-style-type: none"> ○ The love the waterpark (at PIC). 	

Issues Regarding Tourism

- The respondents believe that tourism is helping the quality of life on Guam. It provides jobs and fosters beautification of the island. It contributes to the improvement of the economy as well as the preservation and exposure of our culture to other countries.
- None of the respondents thought that tourism is hurting the quality of life on Guam. When asked about crime and trash on Guam, the respondents did not consider both concerns as tourism related issues. According to them, trash is caused by the increase in Guam's population and mainly the responsibility of its residents rather than tourists.
- They believe that tourism on Guam can still grow. There are always more and different types of people who want to travel. More visitors for Guam means better pay rates for the employees in the tourism industry.

Issues Regarding Tourism: Top 3 issues impacting work

1. Jobs. It provides them with the job that they currently have.

“It gives us benefits. It depends on the company we work for.”

1. Money. Their income allows them to *“pay their bills”*.

2. Friends and relationships. They are able to build valuable friendships and relationships with colleagues and tourists.

Issues Regarding Tourism: Top 3 issues impacting lifestyle

- 1. Ability to live comfortably.** Their job in the tourism industry allows them to live a comfortable lifestyle.
- 2. Seasonality.** Peak season is stressful. They do not get to spend important holidays such as Christmas with family because these are days when their presence is needed more at work.
- 3. Events/ places/ businesses.** Guam organizes several events as well as opens attractions and businesses for locals and tourists to enjoy such as jet skiing, night market, food trucks, and other similar events. The respondents appreciate having these events and more to go to with their families.

“Without tourism, there won’t be too many events.”

Issues Regarding Tourism: Safety

- The respondents believe that visitors have doubts and reservations about the safety of Guam. They felt that certain crimes were published and sensationalized. They see the need to have more security officers in the tourism industry.
- Most of the respondents are aware of the Visitor Safety Officers (VSO) that operate in Tumon. They think they are doing a good job. However, Tumon needs to have more VSO's for every mile to improve their visibility. Hotel employees in the focus group provided examples of crime in Tumon. Several visitors walk from PIC to Kmart and have experienced incidents of snatching. The staff of PIC discourages visitors to walk from the hotel to Kmart but take a taxi instead. Similar incidents of theft occur at beachside properties where visitors sunbathe and swim. Even though visitors are reminded to secure their belongings, they tend to be very trusting and leave their cellphones, wallets, and other valuables unsecured. Theft is occurring on a daily basis now; whereas it was not a significant issue in the past.
- Homeless people lingering in Tumon are considered a nuisance and a safety concern not only for tourists but also for locals who are working in the area. They also contribute to sanitation issue.

Issues Regarding Tourism: Suggestions regarding the safety issue

1. Relocate the homeless people in Tumon to another area.

“Maybe the government can do something. There’s an area there where they are residing but they’re not supposed to.”

2. Provide more security officers in Tumon.

3. Improve the lighting in Tumon, specially from Westin Hotel to Nikko Hotel, from PIC to Kmart, Ypao beach and Matapang beach. Since Verona hotel closed down, there is no lighting on the road from PIC to Kmart. Similarly, the lack of lighting in Ypao and Matapang affects the perception of safety in the area at night. Visitors will enjoy their beach experience more if they can extend their time and activities at the beach up to the evening.

“They should also be able to enjoy the sunset to dusk.”

Opportunities for Better Wages and Advancement

- The respondents thought that the tourism industry provides opportunities for better wages and advancement.
- However, they believe that several positions in the tourism industry, specifically in the hotels, are getting less than desired wages without an increase for a period of time, considering tourism is one of the main industries on Guam. For instance, housekeepers, maintenance, kitchen staff, and helpers all start at minimum wage despite the quality of work that they produce. Wages in the Guam hotel industry is relatively lower than Hawaii.
- *“Take housekeepers, for instance. They work really hard. They’re very busy and they get minimum wage. We’re tourism, right? There’s military, there’s tourism. Why are they getting minimum wage?”*
- They think it could be attributed to the need of the industry to keep its prices at a competitive level since visitors have cheaper options now for a beach destination.
- *“That’s one of the things our tourists like. Our pricing. But it’s because of that also that the businesses are locked down with that kind our pricing. That’s why our pay is also hurting.”*

Opportunities for Better Wages and Advancement

- Despite the perception that several tourism workers are getting minimum wage, respondents are aware of the attractive opportunities for better wages and advancement that their employers offer and are satisfied with them. They felt that the opportunities for better wages and advancement in the visitor industry is “very good”. For example, Hilton has a lot of programs to move up such as the apprenticeship program. Given the opportunities available, it is up to the employees to advance or stay in the same level.
- *‘They’re very good. Hilton has a lot of programs to move up. They have management programs. They push you to go to school. They have apprenticeship programs. I think advancement is there.’*
- The one thing that will increase their satisfaction in working for the visitor industry is “getting paid more.”

Respondents' Perception on GVB's Performance in Marketing Guam

Overall, the respondents are satisfied with GVB's performance in marketing Guam. They have seen GVB's commercials and the hard work that GVB puts into marketing Guam and promoting the Chamorro culture. However, they are interested to know how often GVB is sending information to the source markets visiting Guam. A suggestion was brought up that a representative of GVB should reach out to tourism leaders of source markets to let them know what the Guam visitor industry is doing as well as get feedback on other marketing efforts that GVB can do.

- *"I'm satisfied. I've seen commercials. I've seen the hard work that gets put into them. Wonderful job!"*

Respondents' Perception on GVB's Performance in Marketing Guam: What stands out?

1. **Only on Guam.**

"I actually show these commercials to friends in Nebraska and my friends in Colorado and say here's the reason why you should visit Guam."

2. **Christmas lights display.** Respondents suggested that a lights display be put up during different seasons/ occasions and not just Christmas and adding more lights for a more beautiful display.

3. **Treasure Hunting Tour.**

"My family participated in it and they really liked it."

4. **New Year's Eve Fireworks.** Residents and repeat visitors expect it.

5. **BBQ Block Party.**

6. **Visitor Safety Officers (VSO).** Most of them were aware that the VSOs were initiated by GVB.

7. **Promoting Chamorro Culture.**

8. Movies at the park was mentioned but they were uncertain if it was a GVB event.

Respondents' Perception on GVB's Performance in Marketing Guam: Comparison of GVB's performance now and in the past 5 years

- According to the respondents, GVB's marketing has improved over the past 5 years. There is more advertising and its presence is more visible. They always see a representative from GVB in tourism meetings. They hear about the trips that GVB is doing to promote Guam in other countries. In the recent years, GVB has been using bloggers to promote Guam. The respondents mentioned the GVB website. They felt that it is really helpful and has noticeably improved. The website has been promoting businesses, especially the restaurants on Guam. Speaking of GVB's online presence, the respondents were interested to know if GVB has staff reading the Guam related blogs and comments and taking note of the things visitors say about Guam in different languages, both positive and negative.
- *"There are actually more advertisements out there. GVB's presence is more visible in the Guam Hotel and Restaurant Association."*
- *"To protect the hotel industry, is there somebody in GVB who is reading the blogs, especially in different languages?"*

Respondents' Perception on
GVB's Performance in Marketing Guam:
Successful GVB efforts in the past year

1. Hafa Adai Pledge. The campaign promotes the culture and hospitality of Guam. It is a campaign that everybody is interested in and eager to be part of.

"For me, it is a blockbuster."

1. Trade Show. They promote tourism on Guam.

2. Tourism Works for Guam. Valley of the Latte. Respondents working for the Valley of the Latte were excited that the tour was featured and recognized by visitors.

"More people go to us because of that."

Respondents' Perception on
GVB's Performance in Marketing Guam:
Unsuccessful GVB efforts in the past year

1. Village Fiestas. They were short lived. Perhaps there was no teamwork among villages. It seemed like there were only a few residents that were eager to welcome the tourists.

"There were only a few residents who were eager to welcome the tourists."

1. Ypao night market every other Friday. The Ypao night market that were held every other Friday discontinued. The respondents speculated that not all hotels were participating in it.

Respondents' Perception on GVB's Performance in Marketing Guam: Showing of GVB campaigns to the respondents



#instaGuam

Awareness

Only 1 person had seen the campaign prior to the discussion.

Message

"We have this instaguam. Come to Guam, take pictures, and post them on your Instagram."

Reactions

"I'd like to join it."

"It's good but how are you guys exposing it out there? Awareness for both local and tourists. How often is it being viewed?"

"Yes, it's a way to promote culture."

Respondents' Perception on GVB's Performance in Marketing Guam: Showing of GVB campaigns to the respondents



Awareness

Only 2 had seen the campaign prior to the discussion

Reactions

"It was great! There were a lot of people. There were actually more tourists than locals."

Effectiveness of campaign

The respondents thought the campaign was effective in enticing visitors who are fans of Kpop to come to Guam and attend the event.

"It promotes Korean culture."

Event feedback

The few respondents who went to the event thought it was a success. There were a lot of people at the event. About 80% were tourists while the rest were locals.

Suggestions for future concerts

- Air commercial for concerts several months in advance so visitors can plan their trip to Guam ahead of time.
- Bring more and bigger celebrities to Guam.
- Hold concerts during the low season so visitors will be enticed to come.

"I always check which celebrities are coming to Manila and when they're coming so I can schedule my visit during those days."

Respondents' Perception on GVB's Performance in Marketing Guam: Showing of GVB campaigns to the respondents



Awareness

Only 1 person has seen the campaign prior to the event.

Effectiveness of campaign

The respondents thought the campaign was effective in bringing people to the event.

Event feedback

According to the respondents, the event itself was good. However, they thought it could be improved by having better food selection, better traffic control, and better cultural presentations. Despite being aware that it was a barbeque party, they expressed their desire to see different types of Chamorro food aside from red rice and barbecue. The event attracted a crowd which made parking a challenge. Lastly, the respondents noticed the entertainment was primarily a “battle of the bands”. They would like to see more cultural presentations featuring authentic Chamorro dance, not just Tahitian dance.

“Maybe we can have our own cultural presentation. Not just battle of the bands.”

Residents' Perception on GVB Branding Initiatives

- The respondents thought Guam residents are aware of GVB and what it is doing. Primary source of awareness of is commercials. Another source of awareness is relatives who work for the agency.
- One of them suggested having an outreach to residents of different nationalities to further increase awareness of what GVB is doing and encourage participation.
- *“Maybe a representative of GVB can reach out the leaders of those communities and inform them of what GVB is doing for Guam. In that way, those different nationalities can have an awareness that we have GVB and we’re promoting tourism.”*
- According to the respondents, a GVB initiated event that stood out was the Guam Micronesia Island Fair (GMIF) because it brings people together. For them, GMIF was similar to the Festival of the Pacific Arts and Culture (FESTPAC) but on a smaller scale.

Residents' Perception on GVB Branding Initiatives: Aided Awareness and feedback on GVB Events

Awareness

Only 1 respondent was aware of the event.

Event feedback

"I heard it was fun."



Awareness

Everyone was aware of the Shop Guam E-Festival.

Message

"Discounts."

Event feedback

Several customers participate and avail of the discounts in the Shop Guam E-Festival.



Awareness

Everyone was aware of the United Guam Marathon.

"I've seen the banner at PIC."

Event feedback

Visitors and locals participate in it every year.



Residents' Perception on GVB Branding Initiatives: Aided Awareness and feedback on GVB Events



Awareness

Everyone was aware of the New Year's Eve Fireworks

Event feedback

The customers of the respondents anticipate the New Year's Eve Fireworks and are always asking for the location. The respondents felt that GVB should always hold the New Year's Eve fireworks in Tumon where it's accessible to tourists rather than the area of Onward Hotel. They were aware that various hotels also have their own fireworks events. *"They're always asking where the location is. It sometimes changes. Just keep it in Tumon."*

Awareness

Everyone was aware of the BBQ block party

Event feedback

The respondents thought the event should be continued but should offer more food and entertainment variety.



Awareness

Everyone was aware of the Guam Micronesia Island Fair.

Event feedback

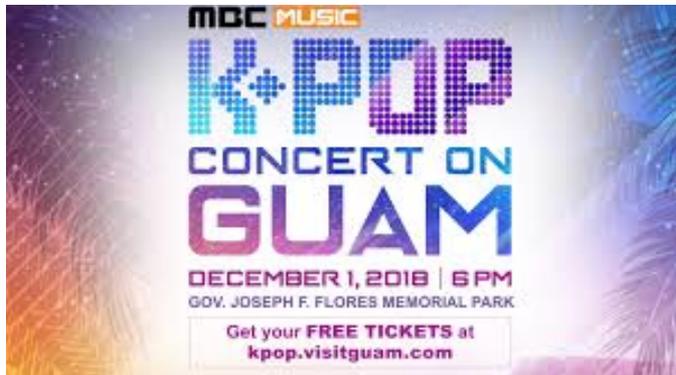
It brings people together.



Local Residents' Perception on GVB Branding Initiatives: Aided Awareness and feedback on GVB Events

Awareness

There did not seem to be a high level of awareness of the Guam K-POP Concert among the locals, but it was well participated by the visitors.



Event feedback

The respondents suggested holding an anime event aside from a K-POP concert. They want to see more celebrities and inform visitors and said it would be good to inform visitors ahead of time, specifically the visitors from Korea, Japan, and Manila, who schedule their visits during periods when airlines offer discounts.

“Whenever airlines offer discounts, they go for it. “

Residents' Perception on GVB Branding Initiatives: Types of events GVB should put more effort into

- There were two types of events that the respondents thought GVB should put more effort into. These are **cultural events** and **night life**. They want more focus on events similar to the Guam Micronesia Island Fair. They also believe that providing sufficient lighting on the beaches will enhance the beach night life on Guam.
- *“What about the night life?”*
- *“That’s what I’m talking about when it comes to our beach area. It’s too dark or it has no lights at all. For example, in the Philippines, their beach areas are actually illuminated. People can still go night swimming and enjoy the beach at night.”*

Provision of Public Transportation for Industry Employees

- According to the respondents, Guam has a very poor public transportation system. The Guam mass transit can hardly ever be seen, especially in the south. They compared it with the tourist buses which were perceived as efficient but with high rates.
- The respondents felt that it is important for public transportation to improve on Guam, especially the increase in traffic. There are employees in the visitor industry who are not able to afford transportation while juggling 2-3 jobs. Parking is also a problem, especially in the tourist area. If employees can take public transportation, there would be more parking areas for visitors.
- *“There are so much cars in Guam. So much traffic. There are people in our tourism industry who are not able to afford transportation so it becomes a problem. They hold 2 or 3 jobs. Plus our parking is also becoming a problem. If we have that mass transit, then it can help the parking situation in each property in Tumon. We can have more local customers come in each property.”*
- When respondents were asked if they would use public transportation to get to work, they all said yes provided the system is made efficient, reliable, and affordable.

Effect of Military Buildup on the Visitor Industry

- The respondents were divided on their feelings regarding the military buildup.
- Respondents who thought it was a good thing for Guam said it contributes to overall safety of the island. They felt the military can protect Guam in the midst of threats such as those from North Korea.
- *“It helps them feel safe that we have military here so if anything happens on Guam, at least our military is on site and they can protect us.”*
- *“During the time that we had our North Korean threat, to tell you honestly, the Korean nationals that came to our hotels said they’d rather be 30,000 miles away rather than 300 feet away so they feel safe and they don’t worry.”*
- On the other hand, the military build up was also perceived to have a bad effect on Guam’s culture and land. Rent and overall cost of living had gone up because property owners are able to collect a higher rent from the military. Another concern raised was the relocation of Okinawa based US marines to Guam, which could have impact on the island’s public safety.
- *“Destroying the land. Destroying cultural things that are on the land.”*
- *“It also can be negative for home rental. Because they are allowed \$2,500, a lot of people decide that they’re going to rent out their home for \$2,500. So, rent becomes difficult.”*

Effect of Military Buildup on the Visitor Industry

- In relation to the visitor industry, the military's presence was viewed to improve the economy since the military is spending their earnings on Guam. The military goes to hotels and other businesses, which gives the visitor industry more sales and revenue. There was an awareness that each hotel is given information on the commanding officers of military personnel staying in its facility for coordination in the event that military personnel issues may occur.
- *"Their presence here improves the economy. It gives more jobs. They're spending."*
- *"It gives us more revenue. It gives us more sales. Whether they're staying in the base or in the hotels, the spending power is there."*
- *"Each hotel is given information on their commanding officer and in times of trouble (if they're getting drunk out of hand), there are these particular people we can reach out to and call immediately."*

Effect of Legalization of Marijuana on the Visitor Industry

- Most of the respondents thought that legalization of Marijuana is a bad thing for Guam.
- The respondents who thought it was a good thing for Guam said that legalization of marijuana will bring in more taxes and more jobs. However, most of the respondents were concerned about marijuana's regulation and control since they do not have a detailed awareness of this. They find it concerning that households can have 6 plants of marijuana in their property. Secondly, they were concerned about the health of first as well as second-hand smokers. Thirdly, addiction is a problem that could lead to an increase in crime rate, including rate, aside from the issue on health.
- *"Taxes. Whatever taxes we get from it will improve our schools."*
- *"How are you going to regulate it? Maybe if it's for medicine, okay. But they're allowing you to have 6 plants per household. If they can show us and give us a detailed information on how it's going to be regulated and controlled."*
- *"Rape case can be high. Crime rate can be high. Fighting can be high."*

Effect of Legalization of Marijuana on the Visitor Industry

- Looking at the effect of legalization of marijuana to the visitor industry, the respondents in favor of it said that it will attract visitors to come to Guam, especially those coming from Japan where marijuana is illegal. It will create a new type of market who wants to smoke marijuana and will bring an additional revenue to Guam.
- On the negative side, the respondents not in favor of marijuana stated that it stays in a person's system for months and Guam is putting Japanese visitors at risk of illegal drug use when they go back to their country. When it comes to use of marijuana by employees in the visitor industry, respondents questioned how employers and GVB are going to handle incidents of getting "high".
 - *"People will want to come here because it's legal here."*
 - *"It stays in their system for months. If they come here and it's illegal in Japan, they go back to Japan and they get tested for the substance and they test positive, there are consequences. We're putting them also at risk."*

Survey on Tourism Attitudes of Residents on Guam (STAR): Focus Group 2 (Industry Stakeholders)



GUAM

October 2019

**Prepared for the Guam Visitors Bureau
by Market Research & Development, Inc.**

Research Background

Market Research and Development, Inc. (MR&D) was contracted by the Guam Visitors Bureau (GVB) to conduct three Surveys of Tourism Attitudes of Residents (STAR) in order to identify the kinds of measures that could be used as a metric for estimating resident attitude regarding tourism and GVB. The first survey was conducted in 2016. The next STAR survey is scheduled to begin in October. Two focus group discussions (FGDs) were determined necessary to assist in structuring the quantitative survey for residents on Guam. The first FGD was conducted with tourism industry frontline supervisors in late September. This second FGD was conducted with tourism industry stakeholders.

Research Objectives

- The questionnaire for the next STAR survey will be based upon the significant findings of the two FGDs with tourism front line supervisors and tourism stakeholders. Both will be used to help develop the questionnaire that will identify drivers of public opinion and key measures of performance GVB should be using to determine success. Specifically, the objectives of the focus group among visitor industry stakeholders was designed to obtain insights regarding the following:
 1. GVB's role in supporting and developing tourism;
 2. Impact of tourism on the local community;
 3. Impact of the military build-up on tourism; and,
 4. Impact of legalization of marijuana on tourism.

Method

- The focus group discussion was conducted in the conference room of GVB on October 11, 2019 at 2:00pm. It comprised of 6 tourism industry stakeholders. The discussion lasted for less than 2 hours.
- The participants of the focus group included:

	Gender	Company
Respondent 1	Female	Duty Free Shop
Respondent 2	Male	United Airlines
Respondent 3	Female	Office of Senator Terlaje
Respondent 4	Male	Guam Chamber of Commerce
Respondent 5	Male	Valley of the Latte
Respondent 6	Male	G4S

Summary of Findings

- The respondents agreed that GVB has been successful in following its mission statement. However, there is a need to re-evaluate the mission statement and what the organization should focus on.
- During the discussion, the respondents repeatedly stressed the need to increase collaboration among agencies in the public and private sectors.
- They felt that GVB should maintain their current level of involvement in government functions. At the same time, they also believe that GVB should have more autonomy with regard to these functions. They proposed GVB to have stronger discretion for non-tourism related functions affecting the Tourism Attraction Fund (TAF).
- The respondents thought that despite the community being educated about the economic importance of tourism, the government does not currently prioritize it compared to other issues it faces and the community shows a lack of participation in keeping Guam a satisfying destination.
- Quality of visitors is considered more important than quantity. According to the respondents, the main measure of quality is “visitor expenditure”. Other measures of quality are repeat visitors and market diversity.

Summary of Findings

- According to the respondents, the measures to gauge resident satisfaction with Guam as a tourist destination should be safety and security, cost of living, improved infrastructure, and diversity of attractions.
- The respondents were divided on their perception of the military buildup. Safety and security is the primary argument of each side who supports and does not support the buildup.
- Regarding the issue of legalizing marijuana, all the respondents thought that GVB should not promote or associate with the cannabis industry. It is a controversial topic and GVB's involvement in it may have a negative impact on the agency.

Principal Findings



GVB's role in supporting and developing tourism

- The moderator presented GVB's mission statement to the respondents and asked them questions on whether GVB is doing a good job in following the mission statement and what GVB can do to better address the mission statement.

- **GVB's Mission Statement**

“The mission of the Guam Visitors Bureau is to efficiently and effectively promote and develop Guam as a safe and satisfying destination for visitors and to derive maximum benefits for the people of Guam.”

GVB's role in supporting and developing tourism: Has GVB been successful in following its mission statement?

- Everyone in the focus group discussion thought that GVB has been successful in following the mission statement. Below are their reasons:
 1. The number of tourists have increased.
 2. There is more diversity in tourists in recent years.
 - *"My experience in having grown up here in Guam, I see there are more tourists here coming from a variety of places, primarily from Japan. Now, we see visitors from Korea, China, and some from Russia."*
 3. Crime has decreased, especially with VSO (Visitor Safety Officers).
 - *"Crime rate from 70's was high because of heroin. With concern for safety, there has been a decrease of the number of tourists that have been injured or robbed because of programs like VSO. This has helped a lot of tourists that frequent Tumon."*
 4. GVB promotes Guam as a safe destination on and off island.
 - *"...also promoting Guam as a safe and satisfying destination. I do know we have teams that go on trips to promote Guam."*
 5. GVB responded immediately during a geo-political issue to assure the community and tourists that Guam is still a safe destination.
 - *"Last year, we saw the down surge. The industry was being affected due to geo-political issues. We saw GVB helping out in promoting Guam as still a safe destination."*
 6. Tourists are now exploring outside the tourist district of Tumon and visiting villages in the south.
 - *"There is a larger number of people coming in, visitors going outside of Tumon in Airbnb's, visiting places in the south using GPS."*

GVB's role in supporting and developing tourism:
What GVB does best in achieving its mission

1. Fostering awareness about the diversity of things that tourists can do and optional tour packages that are available.
2. Attracting market diversity.
3. Showing leadership when addressing issues related to tourism.

GVB's role in supporting and developing tourism: What can be done to address challenges in addressing the mission statement?

- During the discussion on the mission statement, the respondents mentioned the following suggestions for GVB to address :
 1. Re-evaluate GVB's mission statement and what its focus should be.
 - *"I believe that it's met the mission as it's stated now. I see the need to re-evaluate what the mission is. When was the last time we took a look at the mission statement to make it relevant? That was the same mission when I was there 15 years ago."*
 - *"I think everyone is expecting them to address so many other things outside of that mission. There's a broken water line, where is GVB?"*
 - *"Develop Guam as a safe and satisfying destination for visitors. We should do it for everyone."*
 2. Increase collaboration with other agencies, both public and private sectors.
 - *"It's all related to safety but there are other partners in the island. What will others contribute?"*
 - *"Hold the agencies accountable. Knock on their doors and say, 'Hey! This needs to be tended to.'"*
 3. Extend VSO's scope of responsibility beyond Tumon, Tamuning, and Hagatna, to include the southern villages.
 - *"I appreciate that you're utilizing the safety folks in other parts of Guam. They're visible in Hagatna and Tamuning. I'd like to see them more in the southern parts of the island."*
 4. The GVB board needs to have stronger control of the Tourist Attraction Fund (TAF).
 - *"There are people out there getting money that have no relation to tourism."*

GVB's role in supporting and developing tourism: Functions that GVB is involved in that would normally be the responsibility of GovGuam

- The moderator showed the respondents a list of functions below that GVB is involved with that normally would be the responsibility of GovGuam.
 1. Public parks/ restrooms (temporary/ short period of time)
 2. Island wide road maintenance (major highways)
 3. Grass cutting
 4. Median maintenance (Tumon)
 5. VSOs (Tumon and Hagatna)
 6. Streetlights in Tumon
 7. Beach clean up
 8. Landscaping
 9. Lifeguards
 10. Anti graffiti (San Vitores, Fujita, Westin Hill, East Hagatna, Paseo, Carlos Camacho, Farenholt, Chalan San Antonio, Rt. 1 Tamuning, Upper Tumon)

GVB's role in supporting and developing tourism: Should GVB expand or reduce its involvement in government functions?

- In general, the respondents felt that GVB should maintain their current level of involvement in all of the functions shown to them. Respondents placed emphasis on the intrinsic value of the community parks and the feared the destruction of historical and cultural landmarks, if GVB was not involved in maintenance of public facilities.
 - *"If GVB lets go of the reigns, it will go in the wrong direction."*
 - *"A lot of these are historical parks and are important for our kids... The future generations. If they are not maintained they will erode and become trash."*
- None of the respondents believes that GVB should withdraw from any of the projects listed. Respondents stated that "someone has to do it" and emphasized that if GVB distanced itself from these projects, GovGuam entities would be unsuccessful in maintaining them.
 - *"Someone has to do it."*
 - *"GVB has to deal with the entire package"*

GVB's role in supporting and developing tourism: Should GVB expand or reduce its involvement in government functions?

- However, they also believe that GVB should have more autonomy with regard to these functions. Respondents proposed that the board should have regular meetings to hold agencies funded for functions such as park maintenance accountable. They also proposed GVB to have stronger discretion for non-tourism related functions affecting the Tourism Attraction Fund (TAF).
 - *“It is OUR responsibility.”*
 - *“If GVB is providing the funds, they should be able to have more autonomy.”*
 - *“The board should organize a GVB accountability meeting regularly to make sure those entities are getting the job done.”*
 - *“GVB needs to be stronger about not letting those functions that are non-tourism related in the TAF funds!”*

GVB's role in supporting and developing tourism: Should GVB expand or reduce its involvement in government functions?

- Respondents thought GVB should direct their attention to expansion of projects in villages that are becoming popular to tourists such as lighting in Talofofo . They were concerned that if GVB could become more involved with GovGuam functions, “it all comes down to funding”. They stressed the importance of collaborative efforts by stakeholders as well as further involvement by local residents.
 - *“The Commander (GPD) wishes this program would expand into other villages... GPD can focus on high crime activities.”*
 - *“I would like to see more street lighting in Talofofo.”*
 - *“It’s the list of what you have versus the list of what needs to be done that is important here.”*
 - *“How involved are private businesses? Rally up people and government agencies to do a beach clean-up.”*
 - *“Initiate an adopt a highway/ bus stop project.”*

GVB's role in supporting and developing tourism: Deriving maximum benefits for the people of Guam

- Overall, the respondents agreed that the increase of intrinsic values among the locals such as cultural pride corresponds with the increased economic benefits of a growing tourism sector as well as helping to support small businesses. This can be reflected in the following:
 1. GVB's 'Tourism Works' commercial shows Guam's cultural evolution.
 - *"GVB has spearheaded this cultural renaissance"*
 2. Presence of more local products among private businesses.
 - *"Visitors want to experience more local offerings" and this has shifted the mindset of commercial businesses (hotels, department stores, etc.) to promote more island culture/heritage which will aid in deriving maximum benefits for the people of Guam. The opportunities are increasing for small businesses as the trend to "wander" becomes more popular and main tourist areas expand.*
 - *"Smaller businesses are thriving because tourists want to experience local stores and areas."*
 - *"Shell stations are selling local snacks."*
 3. Festivals showcasing local offerings.
 4. Events where the youth showcases Guam's culture.

Impact of tourism on the local economy: Does the community understand the economic importance of tourism?

The respondents thought that the community is being educated about the economic importance of tourism through the following:

1. Media
2. Discussions at the legislature
3. Diverse jobs that are tied into tourism
4. More opportunities for interactions between locals and visitors

Despite knowing the economic importance of tourism, the community displays a certain level of apathy. Residents lack cooperation and participation in keeping Guam a satisfying destination as can be seen during festivals and events where they have disregard to maintaining the beaches and parks clean.

➤ *“Locals need to cooperate more on issues like not walking through hotel lobbies to go to the beach or cleaning up their trash during an event.”*

Impact of tourism on the local economy: Does the community understand the economic importance of tourism?

A majority of the respondents stated that despite the fact that the government understands the importance of tourism, it chooses not to prioritize the duties and functions that support the tourism industry. One respondent stated that “government agencies which are not directly affected by tourism see these responsibilities as less vital”. Lack of funding is often used as a reason for deprioritizing some of these duties and functions.

- *“I don’t think they don’t understand. I think there are more pressing issues and different priorities.”*
- *“They’re not thinking of the bigger picture.”*
- *“The government agencies that are not directly affected by tourism do not think it is as vital.”*
- *“The agencies should be doing their job such as DPR picking up trash anyway. It’s for the island. It’s good so they should do it.”*

Impact of tourism on the local economy:

Top 3 most important contributions of tourism to Guam's quality of life

1. Culture: The movement GVB has promoted has created cultural pride as well as employment opportunities in various parts of the island. A respondent provided the example with the development of Inarajan as a tourist destination.
 - *“There was this motion to build up Inarajan as a cultural destination and there was all of this opportunity building including jobs and more based on our culture.”*
2. Infrastructure: With the increasing amounts of visitors, competition among businesses will arise which will further develop the infrastructure of the island.
 - *“More and more people cause more businesses, which cause more building which betters our infrastructure.”*
3. Jobs/Opportunities: Residents have more opportunities of employment as well as travel destinations.
 - *“People do not have to commute to Hagatna for work now.”*

Impact of tourism on the local economy: Top 3 most significant negative impacts of tourism to Guam's quality of life

1. Crime: The increase of crime rates with incoming visitors.
 - *"There is always a chance that the crimes rates will increase."*
2. Infrastructure/Environment.
 - There are challenges with increased pressure on the island's infrastructure and the negative impact of large-scale tourism on the environment (trash, trampled corals, etc.).
 - *"We cannot control the environment we are in and that is a huge challenge to work around."*
3. Increase in cost of living.
 - Cost of land and housing goes up. The military is among the markets in the tourism industry and since the military is given a high housing allowance, cost of housing has increased. People also buy property to create Airbnb's for tourists. At the same time, the cost of housing in the tourist area (Tumon) is higher than other areas in the island.

Impact of tourism on the local economy: What should be done to increase the community's involvement to tourism?

The following are steps that can be made to increase the cooperation and participation of the community to tourism:

1. Get the youth involved in tourism programs.
2. Increase the involvement of island leaders in tourism programs.
3. Have island leaders talk about the importance of tourism to the community.
4. Capitalize on GVB promotions through televised media
 - This is a strong tool to encourage both the government and residents to cooperate and participate in tourism in a way that benefits the local economy. Respondents discussed how this promotional tool educates residents from an early age that tourism is important for the economy and how everyone in the community is affected.

Impact of tourism on the local economy: What is the industry lacking to make it competitive and more attractive to visitors?

Issues hindering the tourism industry to be more competitive and attractive to visitors:

1. Increase in the homeless population/ increase in beggars
 - Although this was a critical issue, respondents thought this is not GVB's responsibility but that of the government.
 - *"It should not be GVB's responsibility to deal with the homeless, beggars and squatter camps."*
 - *"Homeless and beggars are dealing drugs and that is why they are out there."*
 - The government should have stricter policies on solicitation whether coercive or not.
2. Tourists' desire for even more attractions
 - Respondents stated that the tourism industry lacks attractions and diversity to maintain repeat visitors.
3. Government's lack of priority to tourism
4. Resident's lack of participation and cooperation in making Guam a satisfying destination

Impact of tourism on the local economy: What is the industry lacking to make it competitive and more attractive to visitors?

5. Community's lack of recognition of historical events such as the Spanish occupation
 - *"We go back 3,000 years ago but forget about other historic events which are a part of our culture."*
 - *"The anniversary of the European occupation is coming, and we could celebrate or commemorate that."*
6. There is a need to keep pace with the evolving millennial market that is dominating the Asian tourists.
 - *"We need to evolve for the millennial market and create an infrastructure that speaks to them."*
7. Need for education on the importance of tourism, starting in the early years
8. Competition from other destinations, evolving from what the audience wants
 - One respondent stated that Guam is having difficulty competing with a growing number of lower cost tourism destinations in Asia. Visitors are seeking different destinations that with larger societies offer more varied and diverse experiences.
9. Lack of resources/ capabilities

Impact of tourism on the local economy: Quality vs Quantity

- **Quality of visitors is considered more important than quantity.** The main measure of **quality** is “**visitor expenditures**”. It is often heard in the news and reports that the number of tourists is increasing. However, there is no noticeable increase in sales. The businesses, especially retail, look at the expenditures more than the number of tourists that come in the store.
 - *“You have number of tourists. Then you have visitor expenditure. I’d rather have a hundred visitors spending a thousand dollars rather than a thousand visitors spending a hundred dollars.”*
 - *“Number of tourists is good, but visitor expenditures are what we look at.”*
 - *“Create an appeal to those who are willing to pay for experience.”*

Impact of tourism on the local economy: Quality vs Quantity

- When looking at the quality of visitors, respondents also gauge it by the number of the repeat visitors to Guam. Ability to attract new markets is another measure of success and participants would like to know how residents feel about diversifying the market as well as attracting repeat visitors, and higher quality visitors.
 - *“Obviously, repeat visitors is good and visitors’ expenditures. Ability to attract new markets can be a whole new thing for us.”*

Impact of tourism on the local economy: Resident satisfaction with Guam as a tourist destination

- According to the respondents, the following are concerns they feel should be measured to gauge resident satisfaction with Guam as a tourist destination:
 1. Safety and Security: Are basic safety needs being met for everyone and not just visitors?
 2. Cost of Living: Do residents believe tourism is contributing to an increase in the cost of living?
 3. Improved Infrastructure: Do residents believe that tourism has helped or hurt the islands infrastructure?
 4. Diversity of Attractions: Do residents support increasing the number of attractions on Guam to attract more visitors?

Impact of tourism on the local economy: Resident satisfaction with Guam as a tourist destination

- Respondents stressed that in order to maintain Guam as a quality destination, there needs to be more collaboration with the government as well as stakeholders within the industry. While the respondents agreed that GVB is successfully maintaining projects and functions of the government, they also agreed that this should not be the sole responsibility of GVB.
 - *“There should be more participation from partners and stakeholders on these issues because it benefits them as well.”*
 - *“A lot can be done with government help and GVB educating in schools and villages.”*

Impact of military buildup on tourism: Positive

- The respondents were divided on their perception of the military buildup.
- The reasons of those who support the build up were as follows:
 1. Provides safety and security
 2. Employment opportunities
 3. Improves the economy
 4. Better infrastructure
 5. Brings families back “home”
 6. Brings visitors from mainland to Guam
 - *“Not only do they bring more safety, but they benefit our infrastructure.”*
 - *“They bringing our family members home as well.”*
 - *“Not only our family members, but theirs as well and they bring tourists from the mainland.”*

Impact of military buildup on tourism: **Negative**

- The reasons of those who do not support the build up were as follows:
 1. Military exercises create a negative image as a destination
 2. Increase of military police could be intimidating to individuals visiting
 3. Increase of military personnel impacts the public safety of both tourists and residents
 4. Increase in crime rate
 5. The possibility that Guam's infrastructure will not be able to support the buildup.
 6. Military occupying the hotels detracts tourists
 - *"The military do exercises and do not care what season it is and it's a bad view for tourists."*
 - *"The increase of military police could be intimidating for tourists"*
 - *"I think they are harmful, because I mean they are being kicked out of Okinawa."*
 - *"Can our infrastructure support this big of an increase?"*

Impact of legalization of marijuana on tourism

- Most of the respondents initially believed that the legalization of marijuana was beneficial for Guam.
- Among the respondents who agreed it was beneficial stated that there are **large scale revenue opportunities created by the industry** and sited Colorado as an example. However, each of these respondents suggested caution in promoting the industry because the rules and regulations have not been published and it is not clear how the industry might impact tourism or the community. It was also mentioned that the cannabis legislation was contentious and had created some polarization in the community.
 - *“Personally I think there is a great opportunity here, but we should proceed with caution.”*
 - *“It has been passed in other states and so far there doesn’t appear to be any negatives.”*

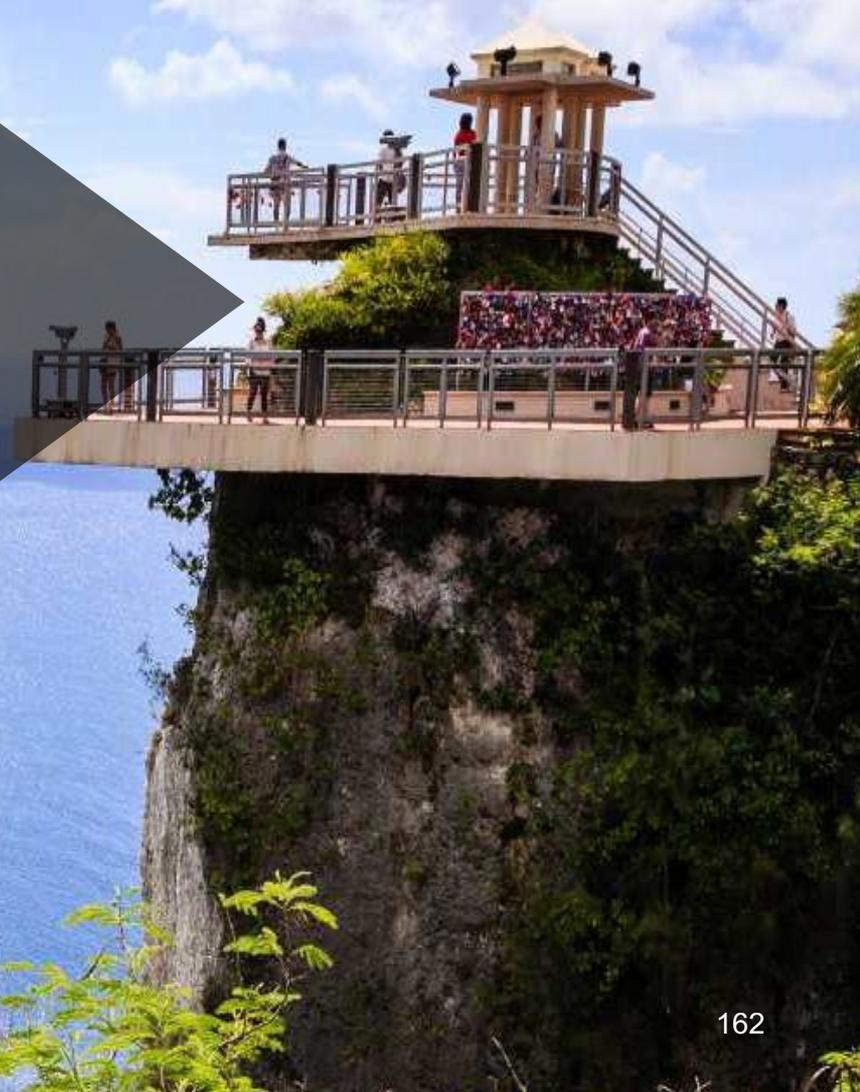
Impact of legalization of marijuana on tourism

- One participant had a strong belief that the new cannabis law was harmful to Guam and stated that **“it is terrible because it is a gateway drug that is affecting our children and leads to an increase in crime rate”**.
- All the respondents thought that GVB should not promote or associate with the cannabis industry. one respondent stated, “if this industry takes off, it will happen naturally”. It was concluded that this topic was controversial and may have a negative impact on GVB if initiated. The group decided that there is much more that Guam has to offer than to be labeled as a marijuana destination.
 - *“I don’t think they should because of the controversy, mixed feelings within the community and its just not the right time, we should focus more on our culture”*
 - *“There is so much more I want Guam to be known for rather than just the marijuana island, we have fitness, food culture and other aspects.”*



RESIDENT PERCEPTIONS OF GVB
AND TOURISM IN GUAM: A
QUANTITATIVE DIGITAL
LISTENING PILOT STUDY

TO: GUAM VISITORS BUREAU
FROM: TWENTY31 CONSULTING INC.
DATE: NOVEMBER 15, 2019



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Tourism.Defined.
www.Twenty31.org

- The findings reported herein are provided on a confidential basis to Guam Visitors Bureau (GVB). GVB is free to use the findings in whatever manner it chooses, including releasing them to their travel and tourism industry stakeholders and partners and/or media.
- Twenty31 Consulting Inc. subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

INTRODUCTION: GVB COMMISSIONED TWENTY31 TO CONDUCT A QUANTITATIVE DIGITAL LISTENING EXERCISE TO UNDERSTAND RESIDENT PERCEPTIONS.

- Guam is a leading tourism destinations in the Pacific, now a popular vacation experience for Russians, Japanese, and South Koreans, among other nationalities.
- The Guam Visitors Bureau (GVB) is the designated destination marketing/management organization (DMO), tasked with both the promotion sustainable management of tourism on the island.
- There is a perception that Guam residents have become increasingly vocal about tourism and specifically anxious about foreign tourists, given political alliances and the location of military bases on the island.
- GVB requested a review of local/resident perceptions of Guam, the bureau itself, and the tourism industry in general. Twenty31 Consulting Inc. was tasked with benchmarking sentiment and perceptions using a quantitative digital listening analysis methodology. The following topline report provides a brief overview of the results.

METHODOLOGY: THE RESEARCH USED AN ALGORITHM TO SEARCH, ORGANIZE AND ANALYZE THOUSANDS OF PUBLIC DOMAIN DIGITAL MEDIA AND EDITORIAL POSTINGS ONLINE.

- Objectives:** The objective of this project was to understand local perceptions of tourism in Guam, particularly about the tourists in general and about the Guam Visitors Bureau. Based on this objective, Twenty31 Consulting Inc. utilized a quantitative digital listening and social media assessment methodology to identify and map resident perceptions.
- Methodology:** The digital listening sources used Boolean search strings and text analysis algorithms to provide insights into online and social media discussions. Online and social media discussions were analyzed historically, as well as in near real-time as posts appeared online. Our digital listening analytical software and related dashboards allowed us to group conversations into relevant topics, as well as categorize the sentiment of conversations as either positive, negative, or neutral.
- Sources:**
- Social media: Twitter (an analysis of Facebook was not possible given the cost to pay for 3rd party assessment)
 - Traditional / Online Media: Blogs, Forums, and News sources (i.e., over 100 sources)
 - Digital Listening Sources: Academic articles, media reports, editorial content
 - Other Publicly Available Statistics
- Timeframe:** June 1, 2018 to September 30, 2019
- Location:** Guam, United States of America
- Key Topics:** 20+ different topics

APPROACH: A SERIES OF MAJOR EVENTS, INDUSTRY DISCUSSION HANDLES AND PUBLIC HOLIDAYS ATTRACTING TOURISTS WERE ASSESSED TO UNDERSTAND HOW CONVERSATIONS STARTED AND EVOLVED.

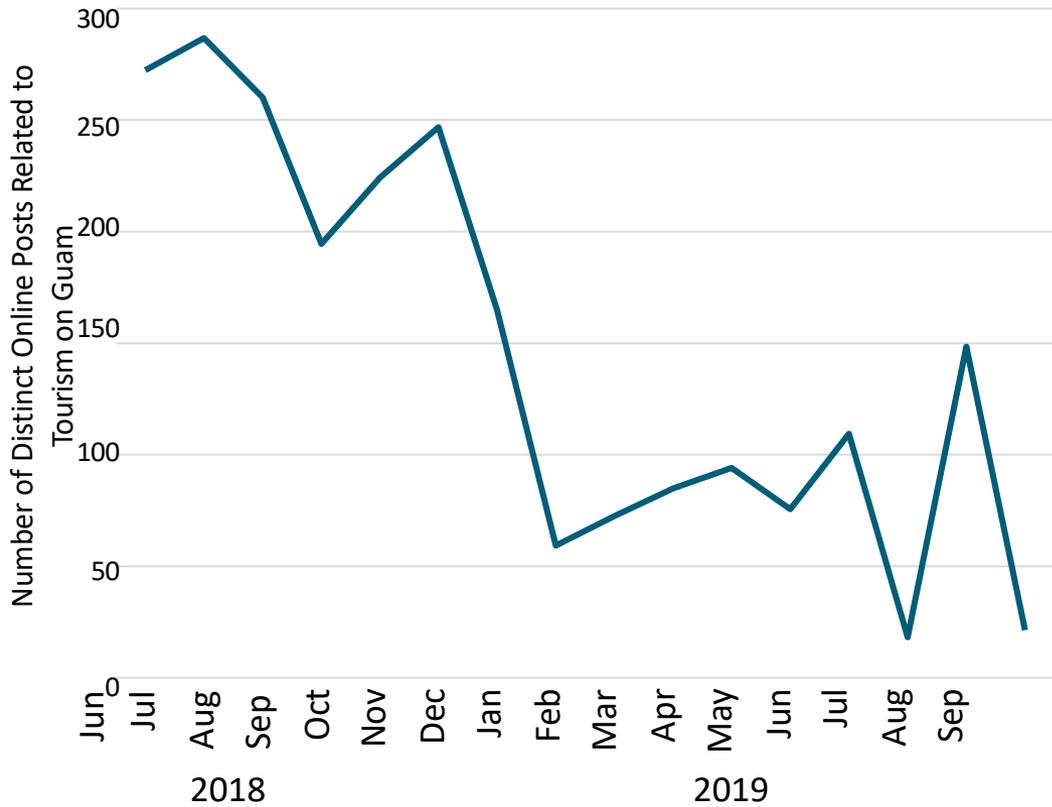
Twenty31 looked at three key areas of tourism within Guam: 1) major events designed and organized by GVB, locals, and/or the government; 2) the travel industry of Guam itself, including any hashtags, organizations, and twitter handles; and 3) national holidays and/or holiday events that would attract high tourism volumes. These key areas included the following search terms:

Events	Travel Industry	Holidays
<ul style="list-style-type: none"> • Guam Micronesia Island Fair • United Guam Marathon • Barbeque Block Party • Koko Kids Fest • Kpop Guam Concert • Shop Guam e-Festival • Golden Week • Autumn Festival 	<ul style="list-style-type: none"> • Travel Talks • instaGuam • Hafa Adai Pledge • Beautiful Destination Guam promotions • Guamazing • Guam Visitors Bureau and GVB • visitguam • Area Code #671 • Visitor Safety Offices (VSOs) 	<ul style="list-style-type: none"> • 75th Liberation • New Years Fireworks • Holiday Illumination Christmas Village

ASSESSMENT: A SERIES OF MAJOR EVENTS, INDUSTRY DISCUSSION HANDLES AND PUBLIC HOLIDAYS ATTRACTING TOURISTS WERE ASSESSED TO UNDERSTAND HOW CONVERSATIONS STARTED AND EVOLVED.

- Discussion volume dropped sharply in December from over 200 mentions a month previously to just over 50 mentions. Mentions started to increase since then, peaking in August with over 100 mentions.
- Mentions were low for the campaign, due to less than 60% (<100K) of the overall population active on social media (i.e., present and posting at least three times per week). Furthermore, no social media account on Guam has more than 10,000 followers, unless it is a news source or news reporter.
- Sentiment around tourism was 40% negative, focusing on national news, environmental changes, and relations with North Korea and China (i.e., impact of geo-political events on tourism to Guam).
- Net sentiment (i.e., Positive sentiment less Negative sentiment) for GVB was around 18%, remaining at that level since December 2018.
- The most popular events managed/coordinated by GVB was the Kpop Guam Concert, following the 75th Liberation, and the Barbeque Block Party. These events greatly stimulated discussion of tourism and GVB's organizational role.

TOPLINE: UNIQUE MENTIONS OF TOURISM IN GUAM PEAKED IN JUNE 2018 AND HAVE BEEN ON STEADY DECLINE SINCE—DIGITAL CONVERSATIONS TYPICALLY FOCUS AROUND MAJOR EVENTS.



Top Hashtags
#guam
#visitguam
#instaguam
#tumon
#guahanfutbol
#travel
#repost
#guammataowcq
#theguambrewerytaphouse
#cheers

Background

- Volume measures the amount of local social media posts in the past year that have mentioned tourism in Guam (related to the search criteria).
- Volume is broken down by total unique mentions per month.

Findings

- Volume dropped sharply in December from over 200 mentions a month to just over 50 mentions.
- Mentions started to increase since then. In August, mentions peaked at 141.
- The most frequently used hashtags include references to Guam and travel related terms.

TOPLINE: WHILE NET SENTIMENT PEAKED JUNE -AUGUST 2018, POSITIVE PERCEPTIONS OF TOURISM ARE THE NORM, INDICATING A STRONG POSITION OF THE IMPORTANCE AND VALUE OF THE INDUSTRY ON GUAM.



The power went out at my event this morning and the tourists all turned the flash on their phones so they could still take lit selfies with me!! 😊 I love my job!!

Respecting the land and the ocean and the wildlife isn't polite, it's expected! No one wants your tourism if it comes at the cost of our wellbeing and the wellbeing of our environment!



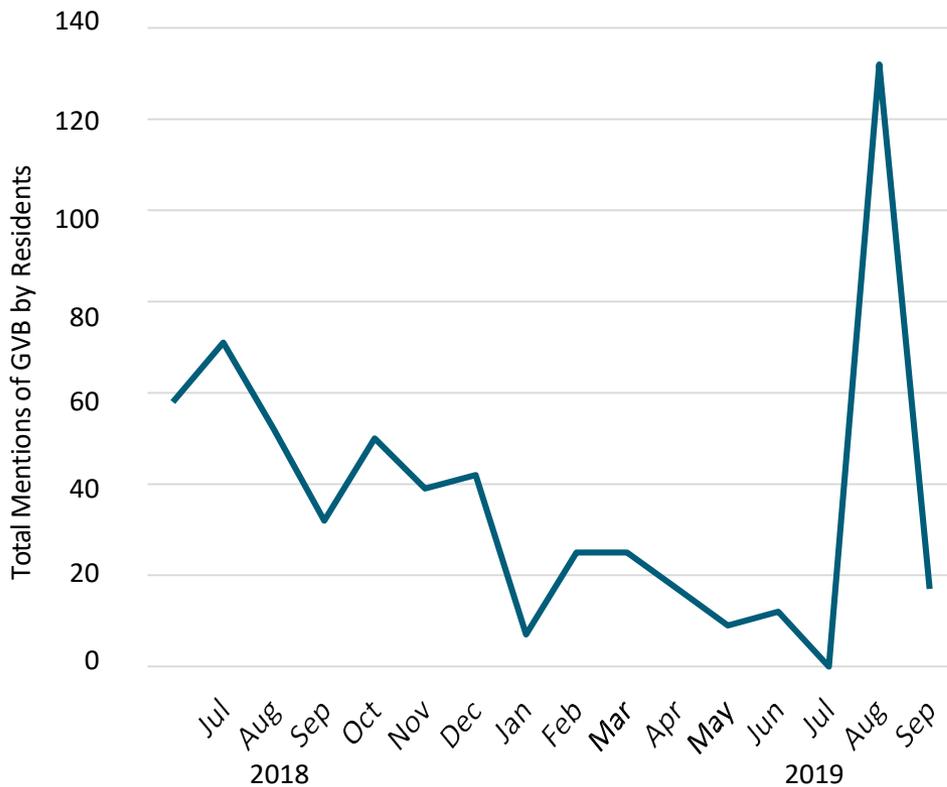
Background

- Net Sentiment measures the percentage of volume that is positive minus the percentage that is negative.
- Net Sentiment is broken into periods of three months.

Findings

- Net sentiment has dropped in the past few months but has still remained positive.

TOPLINE: TOTAL MENTIONS OF GVB ARE RELATIVELY LIMITED AND USUALLY CORRELATE TO WHEN GVB HOSTS TOURISM -RELATED EVENTS – OVERALL DISCUSSION REMAINS POSITIVE.



Top Hashtags
#guam
#visitguam
#instaguam
#tumon
#travel
#repost
#character
#characterdesign
#guammascot
#guamtrip

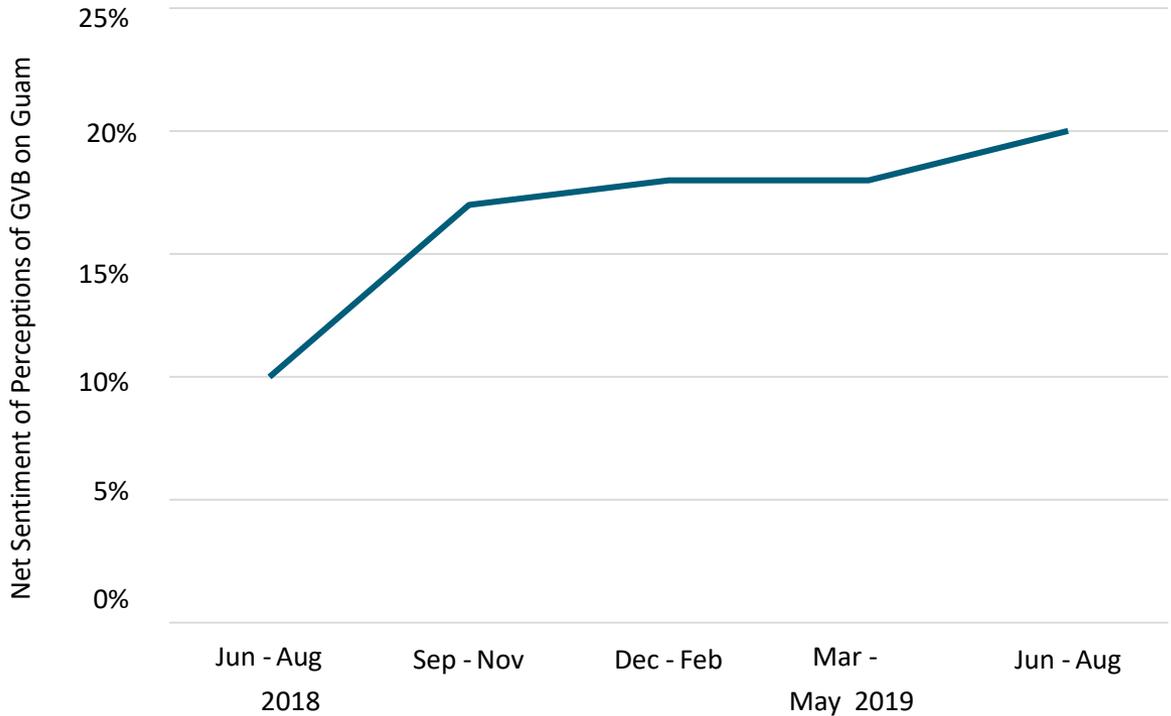
Background

- Volume measures the amount of local social media posts in the past year that have mentioned Guam Visitors Bureau.
- Volume is broken down by mentions per month.

Findings

- Mentions of GVB have been gradually decreasing.
- Mentions around GVB peaked in August, which was related to the positive sentiment around tourism numbers during the month of July.
- The most frequently used hashtags include positive references to GVB and to GVB events and campaigns.

TOPLINE: NET POSITIVE PERCEPTIONS OF GVB HAVE STEADILY INCREASED SINCE JUNE 2018 – INDICATING THAT GVB’S COMMUNITY OUTREACH AND ENGAGEMENT EFFORTS ARE HAVING IMPACT.



Thank you to the Guam Visitor's Bureau, Sponsors and everyone who have made this New Years Eve Firework display a fun, beautiful and safe one!

That's what this is & GVB can eat sh*t. Homeless people are part of our community. Guam is their home too, not just a product that solely exists for foreign consumption.



Background

- Net Sentiment measures the percentage of volume that is positive minus the percentage that is negative.
- Net Sentiment is broken into periods of three months.

Findings

- Net sentiment has increased since last year and has remained steady for the past 8 months.

TOPLINE: DIGITAL CONVERSATIONS AROUND GVB ALMOST EXCLUSIVELY FOCUS ON MAJOR EVENTS ORGANIZED BY GVB ON GUAM – SENTIMENT TENDS TO BE POSITIVE AND STRUCTURED ON GVB’S POSITIVE ROLE.

Event	Total Distinct Digital Conversations (August 2018-September 2019)
Kpop Guam Concert	664
75th Liberation	299
Barbeque Block Party	77
Shop Guam e-Festival	69
Dededo Flea Market	53
United Guam marathon	50
Tourism Works	50
Plaza de Espana	50
Hafa Adai Pledge	41
Guam Micronesia Island Fair	24
Autumn Festival	21
Golden Week Guam	14
Visitor Safety Offices (VSOs)	13
New Years Fireworks	12
Koko Kids Fest	8

Background

- Volume measures the amount of local social media posts in the past year that have mentioned the Guam Visitors Bureau.
- Volume is broken down by mentions over the past year.

Findings

- The Kpop Guam Concert received by far the most volume with over 600 mentions.
- The 75th Liberation finished with the second most mentions and was the only other term to receive over 100 mentions the past year.
- The Barbeque Block Party, Guam e-Festival, and Dededo Flea Market rounded out the top five.

TOPLINE: WHILE THE ABSOLUTE VOLUME OF DIGITAL CONVERSATIONS ABOUT TOURISM AND GVB ARE RELATIVELY LOW, GUAM RESIDENTS DO VOICE THEIR OPINIONS ONLINE WHICH TEND TO LEAN POSITIVE.

Ernie Galito @Granbyhigh · Jan 2
 Venice is considering a \$10.40 tourist tax for its 30 million annual visitors, most are day-trippers from cruise ships. Should Guam consider such a tourist for those visitors not staying in hotels?

Trina Cruz @guenzuztr
 Replying to @Granbyhigh
 Guam is very lucky to have a healthy tourism industry. We should stop looking at our tourism industry as nothing more than a funding source for our gov't and instead look at it for what it is, TOURISM. My answer is no. We aren't entitled. We are fortunate.

6:55 AM · Jan 3, 2019 · Twitter for iPhone

KUAM News @kuamnews · Feb 18
 On [KUAM.com](#): Nate Denight proud of GVB's achievements under his watch

Nate Denight proud of GVB's achievements under hi...
 A new week brings a new head of the Guam Visitors Bureau. Work for Pilar Laguana as the agency's new ...
[kuam.com](#)

1 Like

John Borja @WordofJohnGuam
 Replying to @kuamnews
 I hope GVB continues forward with Nate's work. He brought Guam tourism to the next level and didn't stay stagnant with one one market. He diversified and implemented marketing events such as concerts and block parties.

Tomika @Rcet30 · Jun 12
 Damn a netflix show featuring Guam? Our tourism about to go UP 🍷

mikayla @mikayladomi · Jun 12
 I cannot believe Kat Graham from Vampire Diaries and Alexander Ludwig from Hunger games are here on my island! 🇬🇺❤️ Let's Represent Guåhan pic.twitter.com/CPGz3kHXF

Show this thread

Guam PDN @GuamPDN · Jun 21
 GVB announced visitor arrivals for May 2019 broke a 22-year-old record, making it the top May in **Guam's tourism history.**



Guam breaks May visitor arrivals record
 The Guam Visitors Bureau announced visitor arrivals for May 2019 broke a 22-year-old record.
[guampdn.com](#)

Adam Minter @AdamMinter · 12h
 Kim Jong-Un's 2017 threat to incinerate Guam ... boosted the island's brand awareness and led to an influx of South Korean visitors.



After President Donald Trump Put Them on the Map, Guam Looks to C...
 Few destination marketers would consider it good news to stare down a nuclear threat. Yet that's exactly where tourism officials in Guam found...
[skift.com](#)

JERRED-ALEXANDER @WHOISJPARADISE · Jan 3, 2018
 Just realized that we've been subconsciously laying the ground work for the future of **tourism on Guam**. With the usual Asian family attendance in decline it now makes more sense to push the Arts to attract a much broader and relevant market. Let the people win. #GuamBasedCreatives

6 25

GuamGuam671 @guahanguam671
 Replying to @BAHHNGA325 and @RealJamesWoods
 We had a guy back home a senators for years screaming give us our land back from the Us government. They just decrease the troops hurting the economy and slowed tourism hurting the local Chamorrus. If we had casino al of Asia would visit our island & have massive revenue,survival

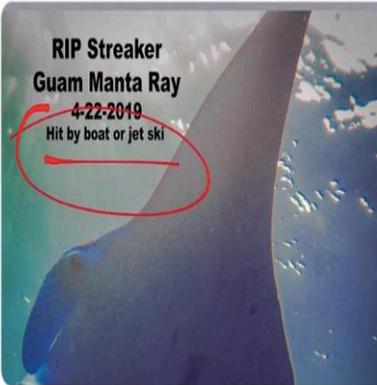
3:59 PM · Feb 25, 2019 · Twitter for Android

JUNGLE JIM @junglejimguam · Feb 2
 @AtRealDonaldTr1 Dear My kick ass President Trump. I have been in Saipan for 29 years and now on Guam Please remember your fans in the Pacific. Saipan has a serious problem with Chinese birth **tourism**. It is rampant. It disgusts me. They have no love for our country. Only using us

rey d @reydal · Dec 8, 2018
 in the new era of #guam tourism, the visitors are now cost-sensitive enough that they don't mind walking to the airport. with full-size luggage, even.

6 25

@msashleyhope · Apr 24
 Spread awareness about this. Manta populations on Guam are surrounded by tourist disturbances: jet ski companies and boat tours. Please take this seriously, these gentle giants need us to speak up for their protection. we shouldn't allow tourism to be more important than them 🙏



RIP Streaker
 Guam Manta Ray
 4-22-2019
 Hit by boat or jet ski

KUAM News and Guam PDN

1 274 262

OBSERVATIONS: WHILE THE DIGITAL LISTENING PILOT WAS LIMITED IN SCOPE, 3 MAIN OBSERVATIONS WERE OBSERVED IN THE DATA INCLUDING THE IMPORTANCE OF PROMOTING TOURISM TO GUAM RESIDENTS.

- Promote tourism to locals during the offseason
 - Reinforces tourism’s importance to the island economy as well as nurtures a sense of place and community
 - Guam residents are the best ambassadors to sell and promote the island and deliver on the visitor experience

- Use Kpop as a promotional tool
 - Research local views on Kpop and its global rise in music
 - Use music to create a connection between Guam residents and tourists
 - Generates high social media mentions about Guam which lean positive

- Endorse educational services and historical landmarks
 - Rich WWII and military history
 - Sponsor cultural events that bond tourist and Guam residents
 - Environmental education including local wild and marine life

Twenty31 Consulting is a research and innovation based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.

twenty31.org

