

# Guam Destination Brand Perceptions

## Guam Visitors Bureau General Membership Meeting

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Prepared for the Government of Guam Bureau of Statistics and Plans by Omnitrak Group, Inc. | April 2025





# Research Objectives

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The primary research objective for this project is to distill insights that will guide Guam's Tourism Recovery plan, but now with an eye toward unearthing insights to guide Guam's longer-term marketing and branding strategy. More specifically, to:

- **Perceptions of the Guam Visitor Experience:** Unearth insights into travelers' attitudes/perceptions of the Guam visitor experience.
- **Factors which influence Guam Travel Decisions:** Identify key factors which influence travelers' decision to visit Guam, vis-à-vis factors which influence travel decisions for competitive destinations.
- **Points of Differentiation:** Identify Guam's Unique Selling Points that enable the island to differentiate its tourism experience, including insights into the destination's key experience pillars.





# Key Takeaways

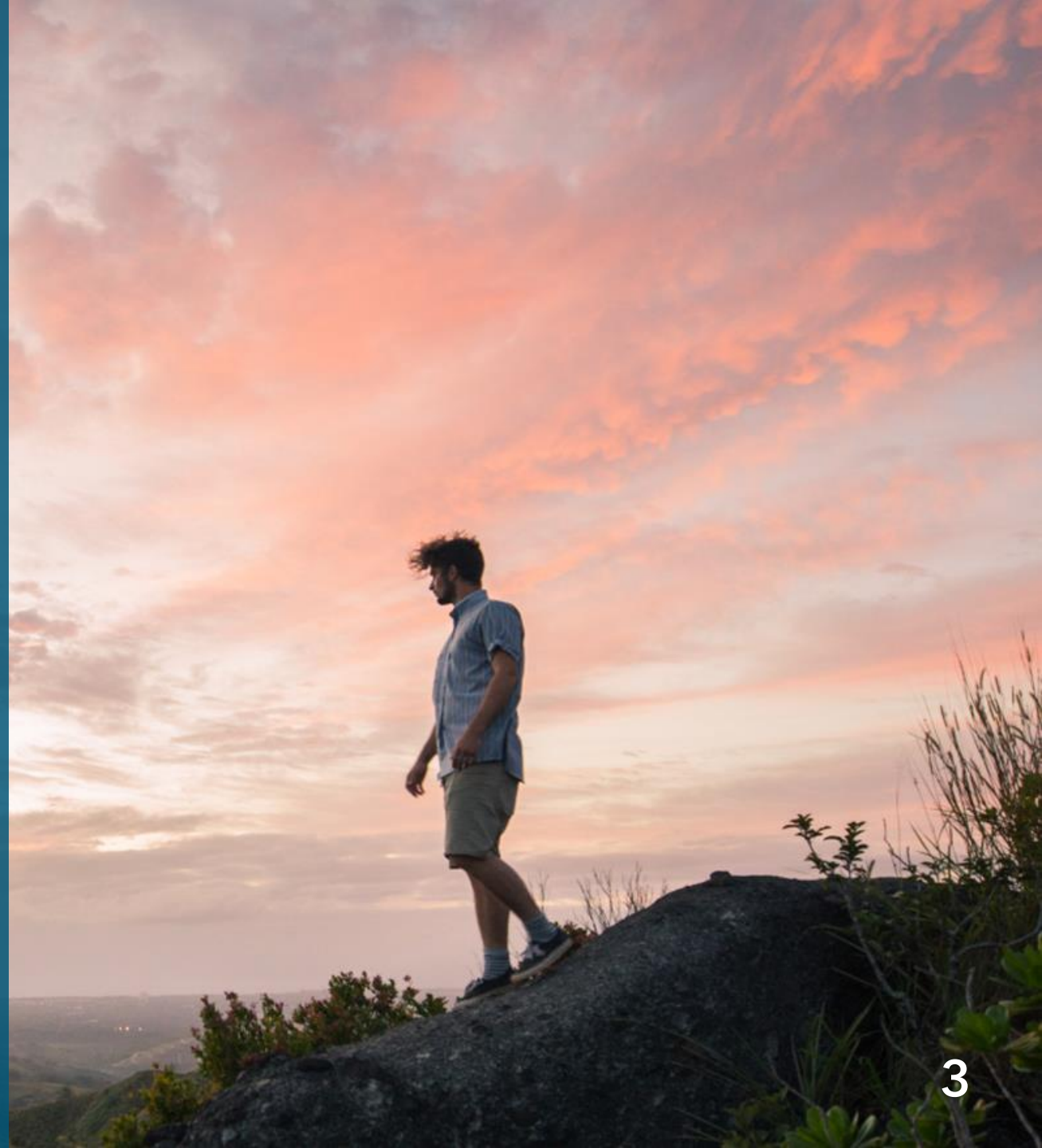
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Due to a lack of familiarity with the Guam experience, Japan, Korea and Taiwan travelers primarily perceive Guam as a touristy resort destination with water activities

In order to drive increased travel interest in Guam, marketing should build upon and beyond the island's solid perceptions as a resort destination.

Beyond re-branding, traveler destination perceptions of Guam identified product development/marketing opportunities for the island in the areas of:

- ❑ Safety and security
- ❑ Clean accommodations
- ❑ Visitor experience of a well-maintained destination, unique local cuisine, iconic features, cultural attractions and good value for the money.





# Methodology

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## Survey Methodology

Data was collected via online surveys administered in February-March 2025 to a random sample of n=2,251 qualified respondents in Guam's key source markets.

## Key Source Markets

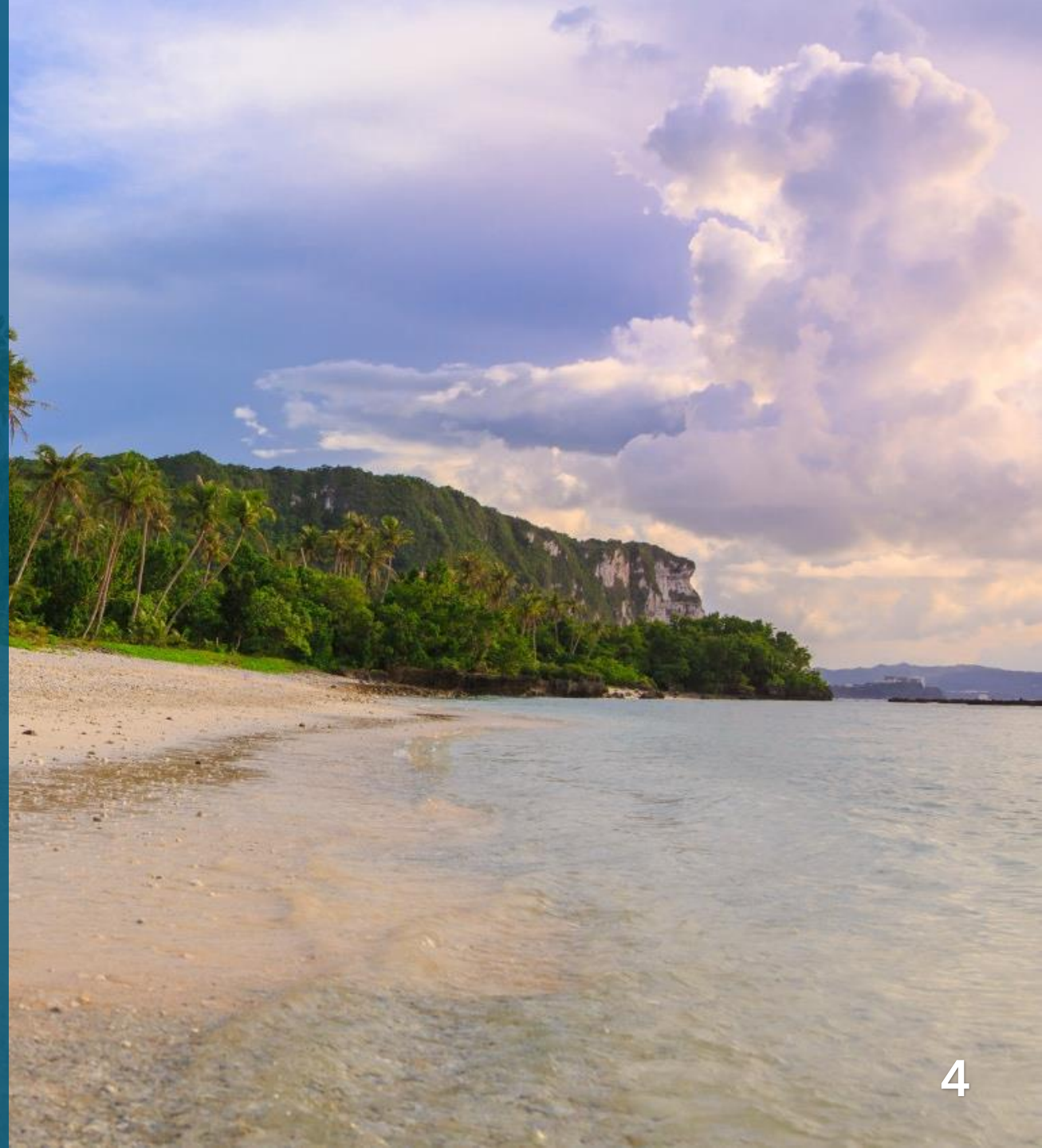
Full-time residents of:

- Japan (751)
- South Korea (750)
- Taiwan (750)

## Respondent Qualifications

Respondents screened as:

- Ages 21 and older.
- Social Economic Classes A through C (i.e., upper and middle class segments).
- Have traveled overseas at least once since 2021 or intend to travel overseas at least once in the next 24 months.
- Decision maker or co-decision maker regarding travel destinations and travel arrangements.





# Korea Overseas Travelers

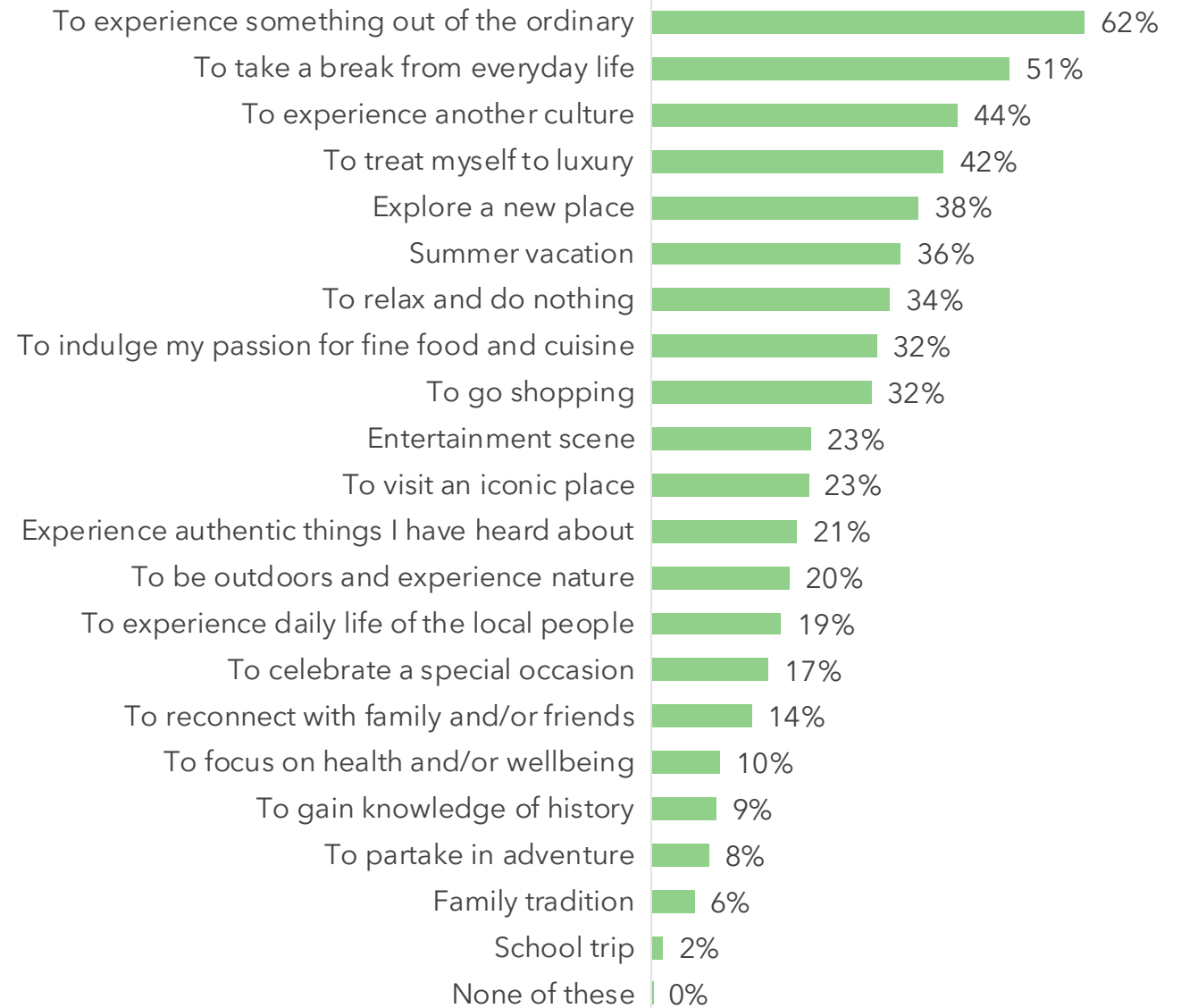
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# Overseas Leisure Travel Motivations Korea

When Korea overseas travelers go on vacations, they seek to experience something out of the ordinary, a break from everyday life, and opportunities to experience another culture.

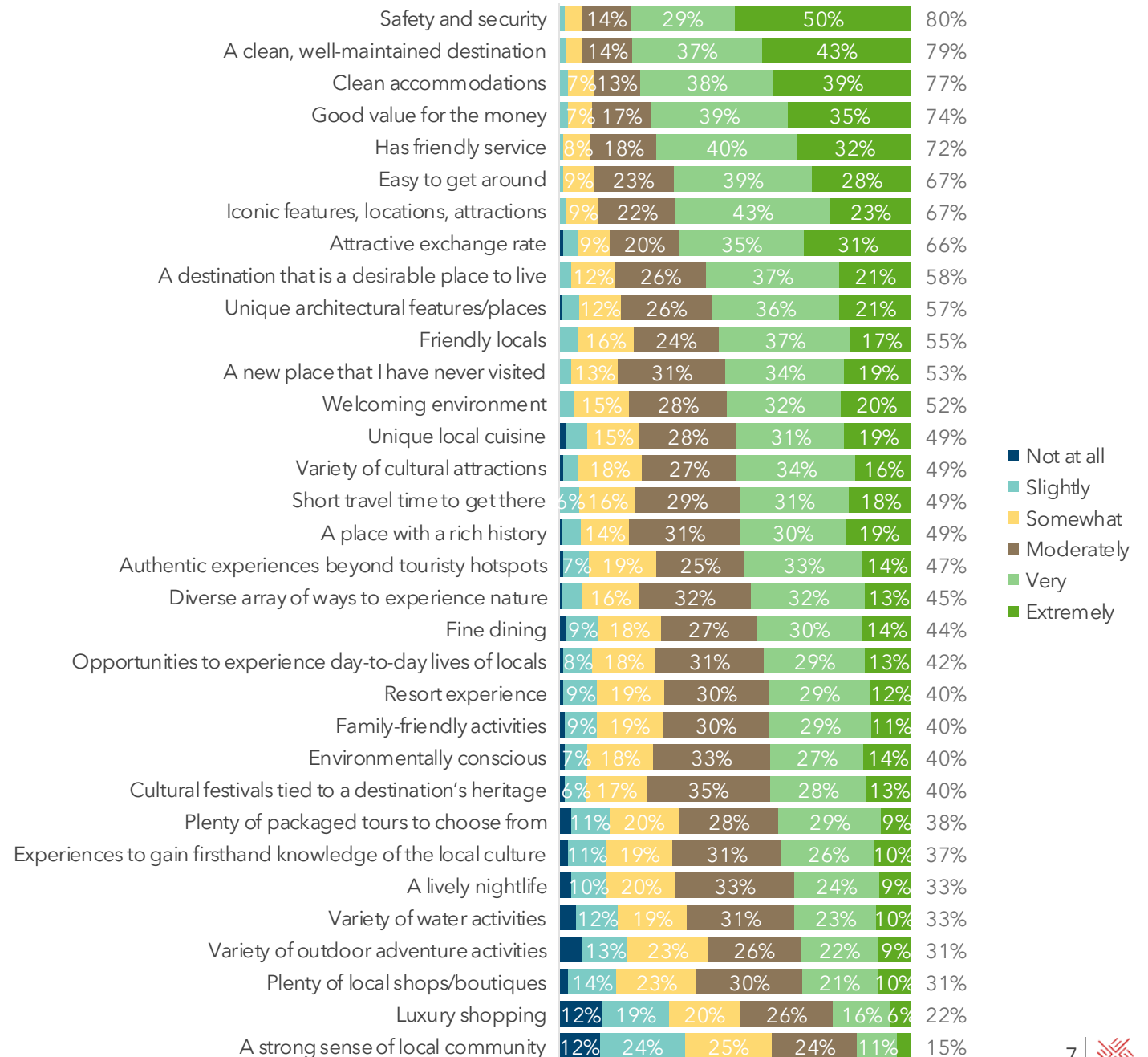
While overseas vacations are indeed about escape, they are equally about experience.



# Desired Overseas Vacation Destination Attributes Korea

To satisfy their desire for out-of-the-ordinary experiences, Korea overseas travelers seek out destinations which are safe and secure, clean and well-maintained, and offer clean accommodations, good value for the money and friendly service.

By comparison, resort experiences, packaged tours, outdoor/water activities and luxury shopping rank lower in overseas travelers' preferences.



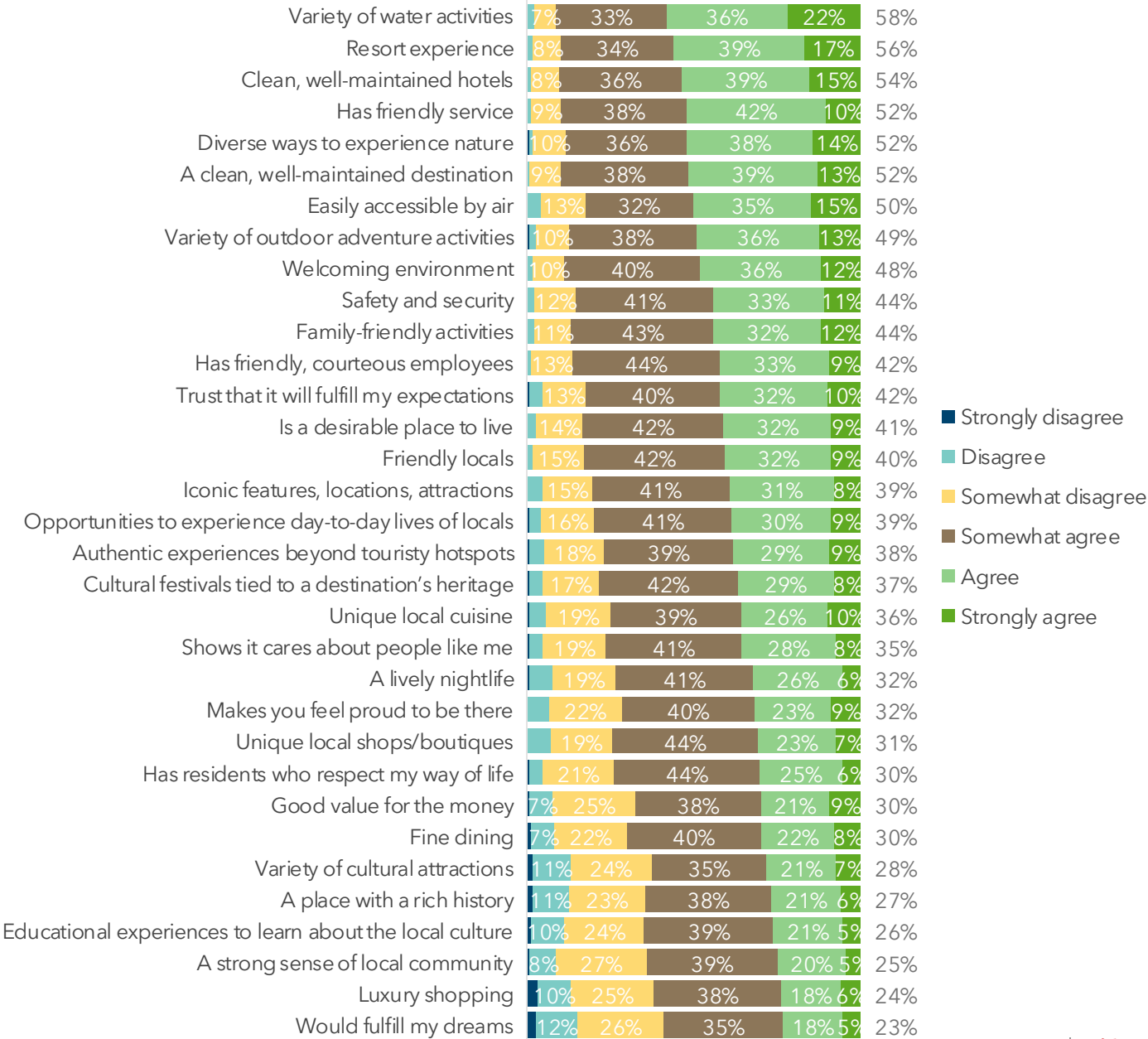


# Guam Ratings on Destination Attributes Korea

As Korea overseas travelers search for destinations with out-of-the-ordinary travel experiences, they perceive Guam most strongly as a resort destination with water activities, clean, well-maintained hotels, friendly service and diverse nature experiences.

The top desired destination attribute (i.e., Safety and security) appears lower in Guam’s ratings.

Unique offerings (e.g., local cuisine, local shops/boutiques, rich history) also rank lower in overseas travelers’ perceptions of Guam.

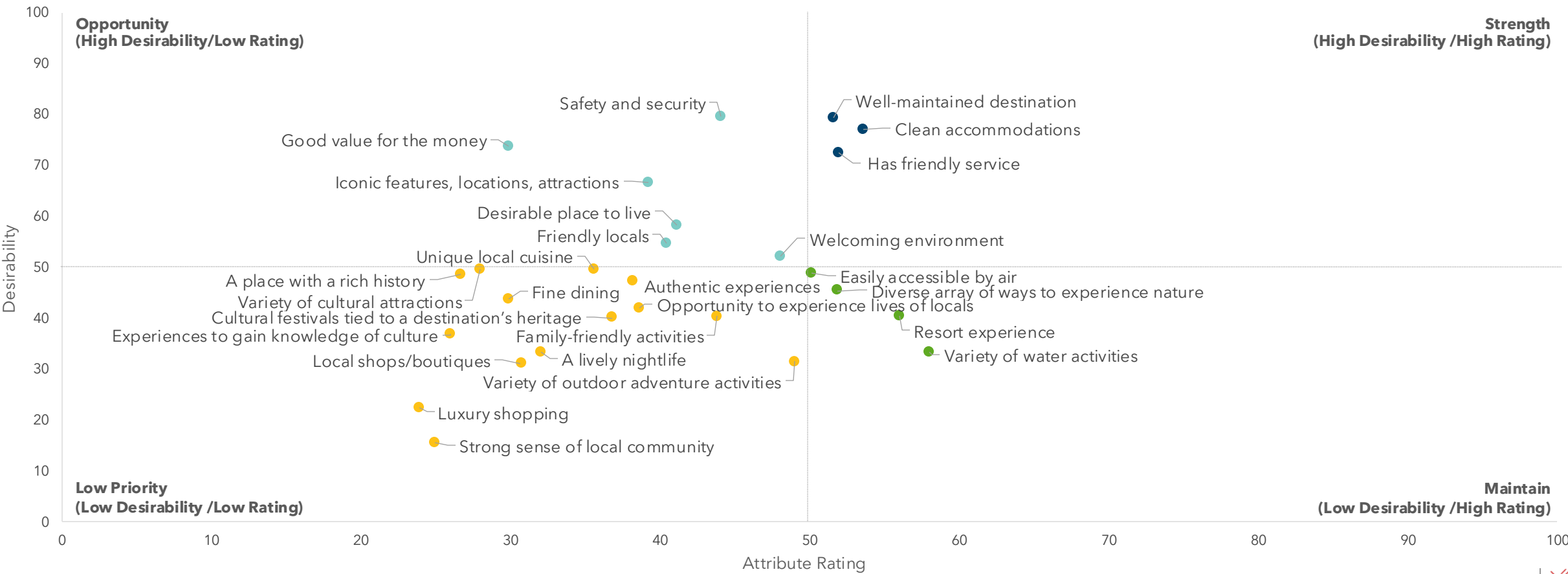




# Destination Attribute Desirability vs Guam Rating Korea

The top left quad shows opportunities to improve Guam perceptions based on attributes desirable to the audience. The top right shows where Guam already performs well. The bottom quads show attributes of lower desirability that should be low priority in terms of brand objectives.

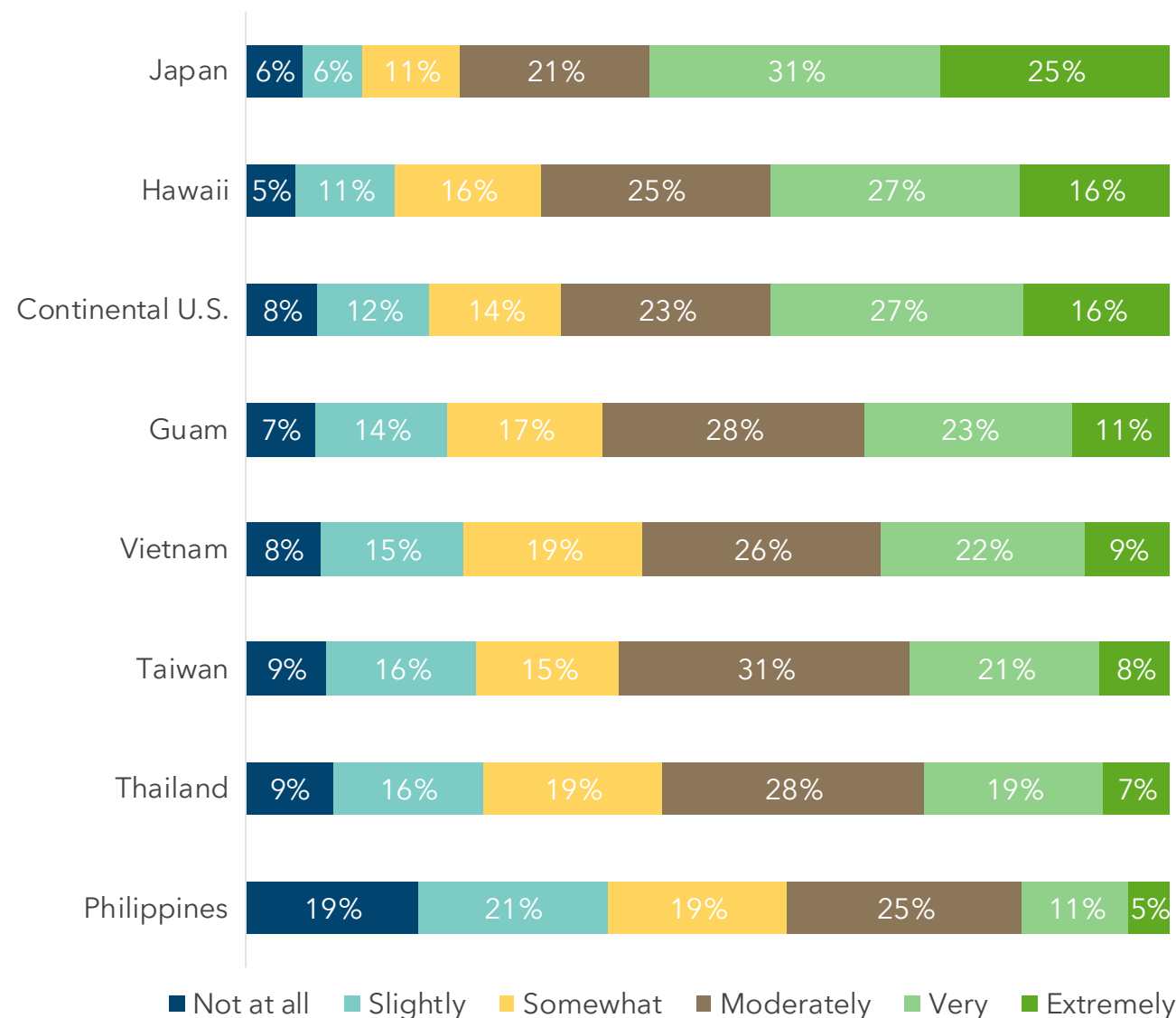
Of the nine attributes rated as being desirable among the Korea target audience, Guam received high ratings on three of them (Well-maintained destination, Has friendly service, and Clean accommodations). However, opportunity to improve still exists for six attributes.



# Future Interest in Visiting Destination Korea

Fueled in part by the desire for new overseas travel experiences, Korea travelers rank Guam relatively higher in terms of future travel interest, compared with the island's lower ranking in terms of visitation and familiarity.

About one-third (34%) of Korea overseas travelers are extremely (11%) or very (23%) interested in visiting Guam in the next two years –a level of future travel interest surpassed by only Japan (56%), Hawaii (43%) and the Continental U.S. (43%).





# Japan Overseas Travelers

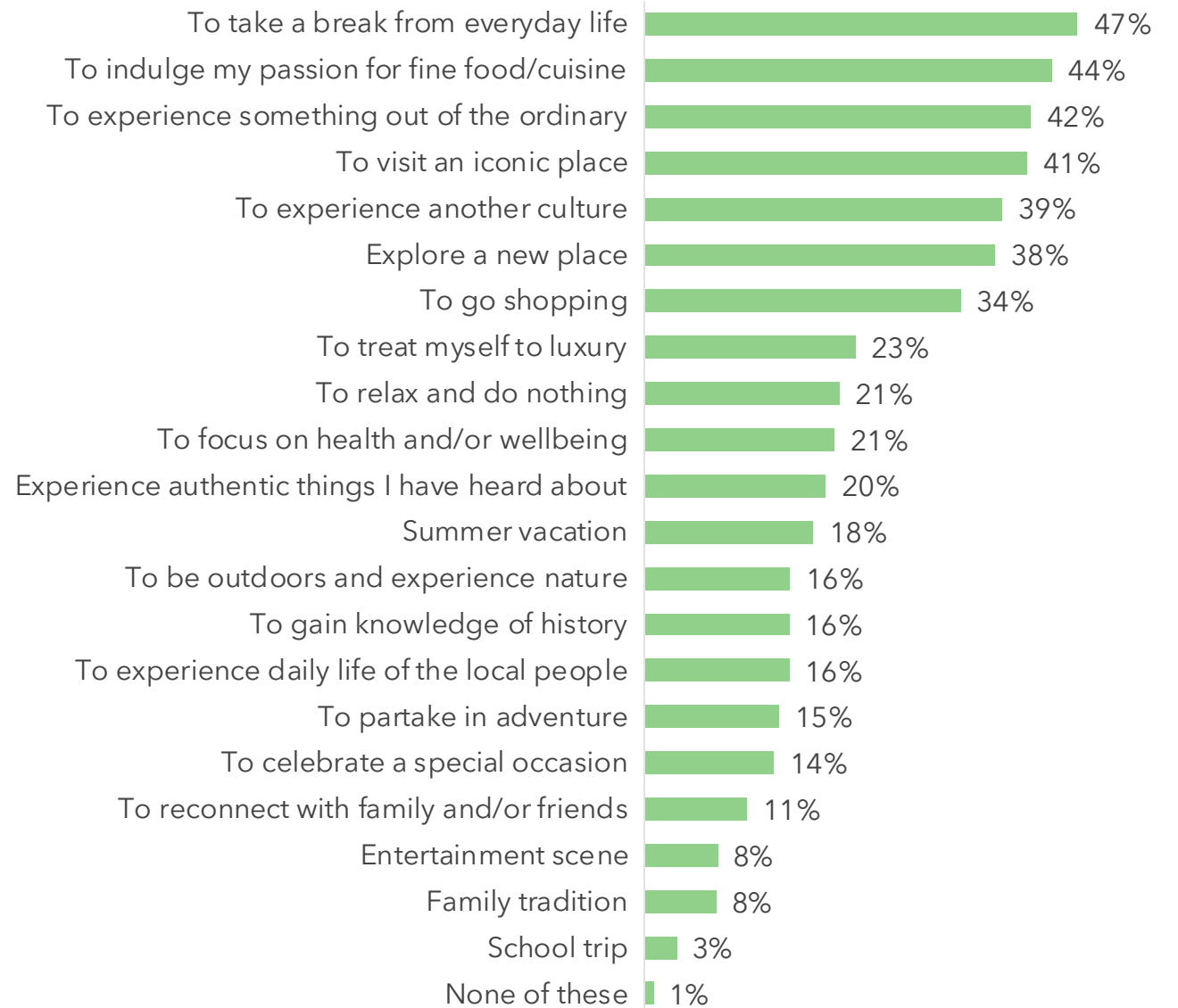
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# Overseas Leisure Travel Motivations Japan

When Japan overseas travelers go on vacations, they seek a break from everyday life, opportunities to indulge in fine food/cuisine and to experience something out of the ordinary.

While overseas vacations are indeed about escape, they are equally about experience.

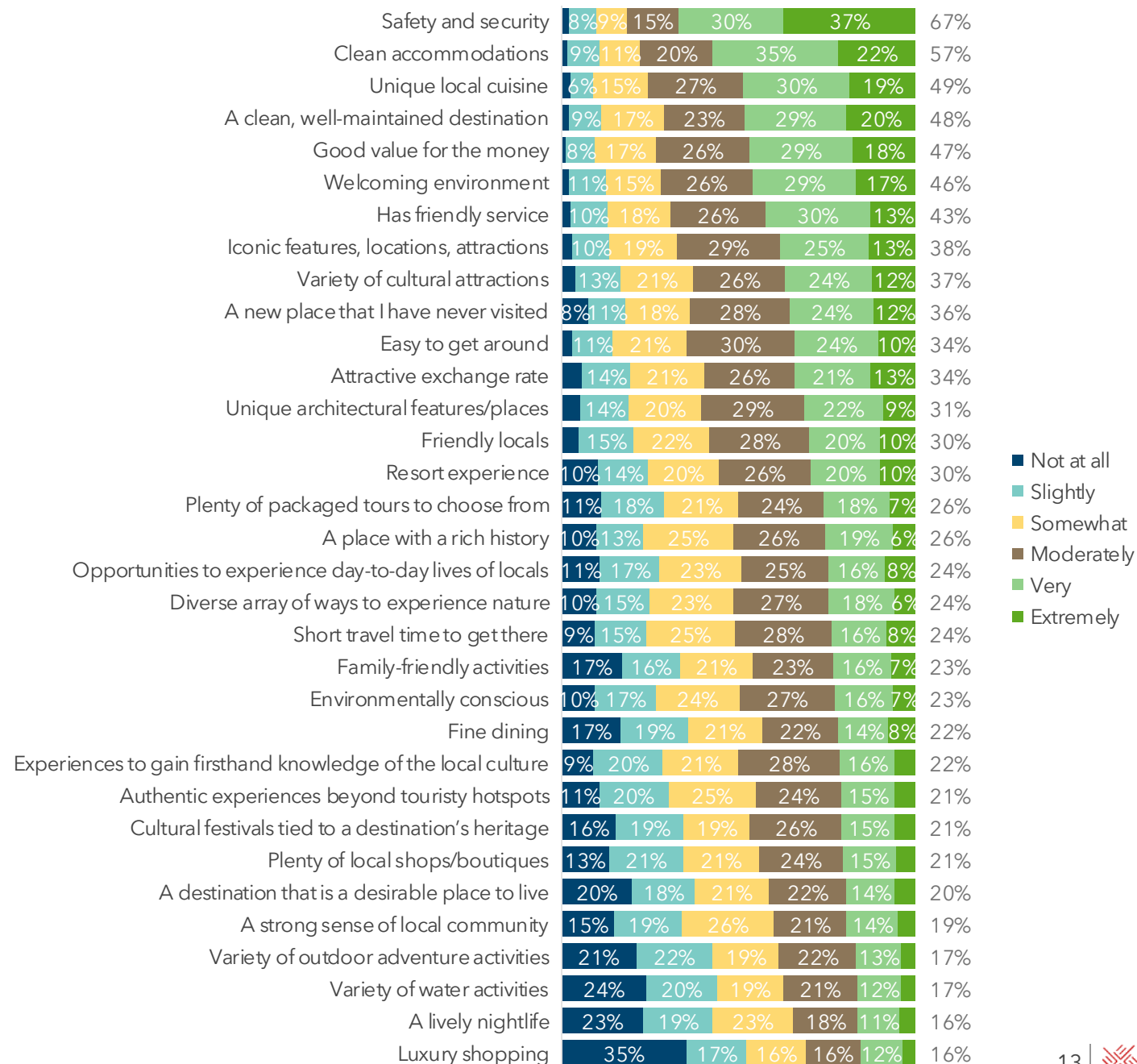




# Desired Overseas Vacation Destination Attributes Japan

To satisfy their desire for out-of-the-ordinary experiences, Japan overseas travelers seek out destinations which are safe and secure, offer clean accommodations, unique local cuisine, are clean and well-maintained, and a good value for the money.

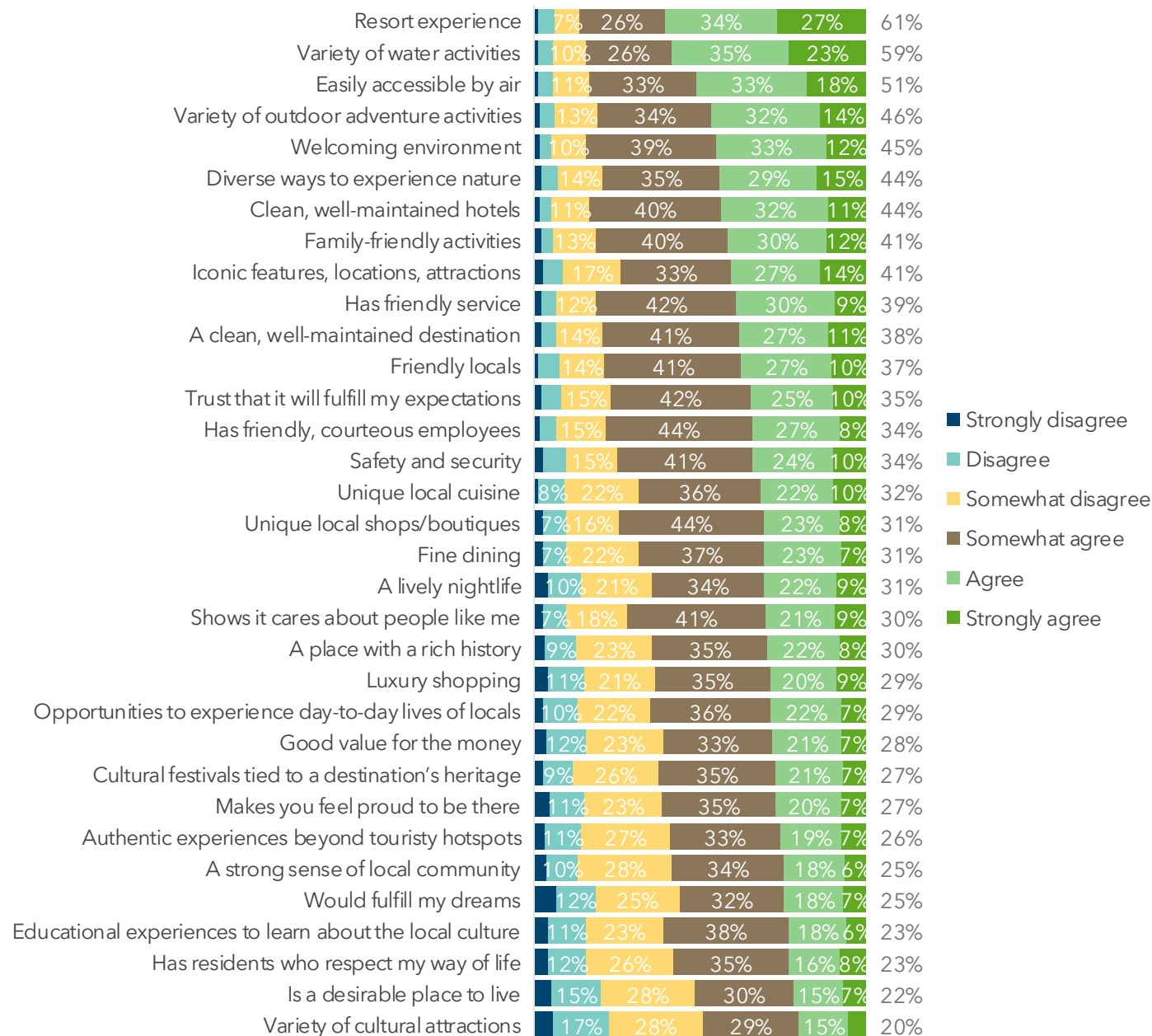
By comparison, resort experiences, packaged tours, outdoor/water activities and luxury shopping rank lower in overseas travelers' preferences.



# Guam Ratings on Destination Attributes Japan

As Japan overseas travelers search for destinations with out-of-the-ordinary travel experiences, they perceive Guam most strongly as a resort destination with water/outdoor adventure activities, easy air access and a welcoming environment.

Unique offerings (e.g., local cuisine, local shops/boutiques, rich history) rank lower in overseas travelers’ perceptions of Guam.

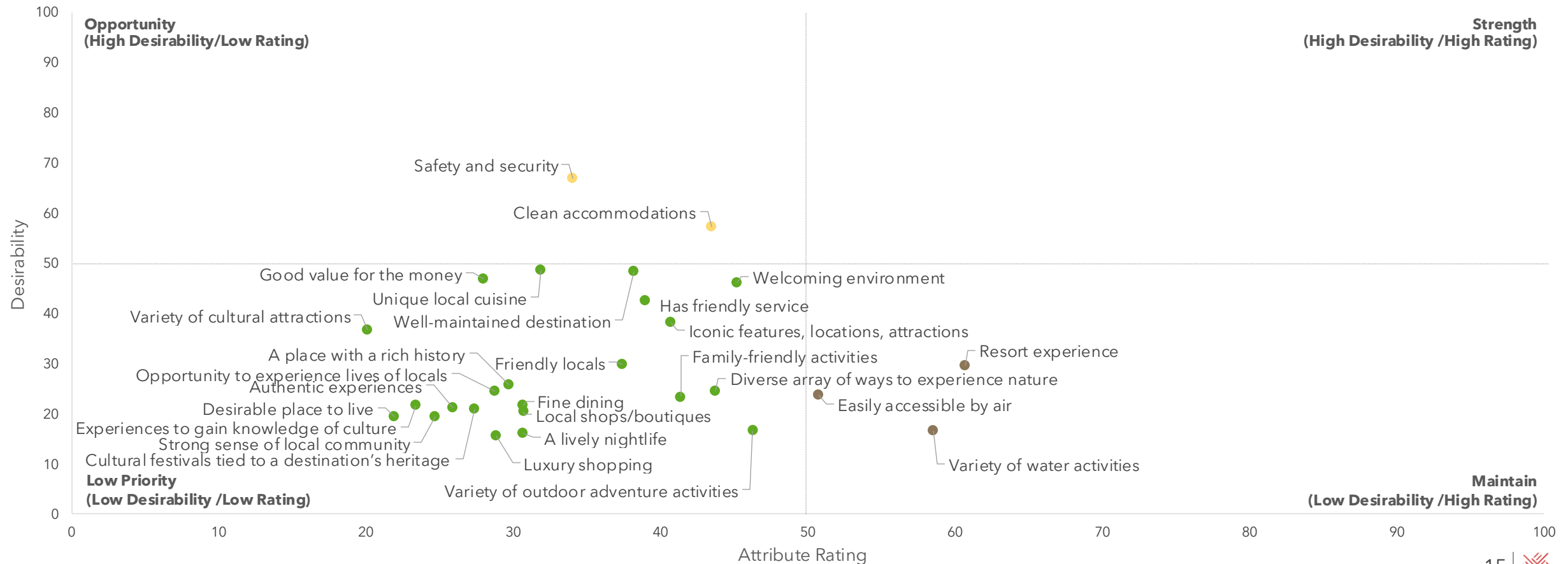




# Destination Attribute Importance vs Guam Rating Japan

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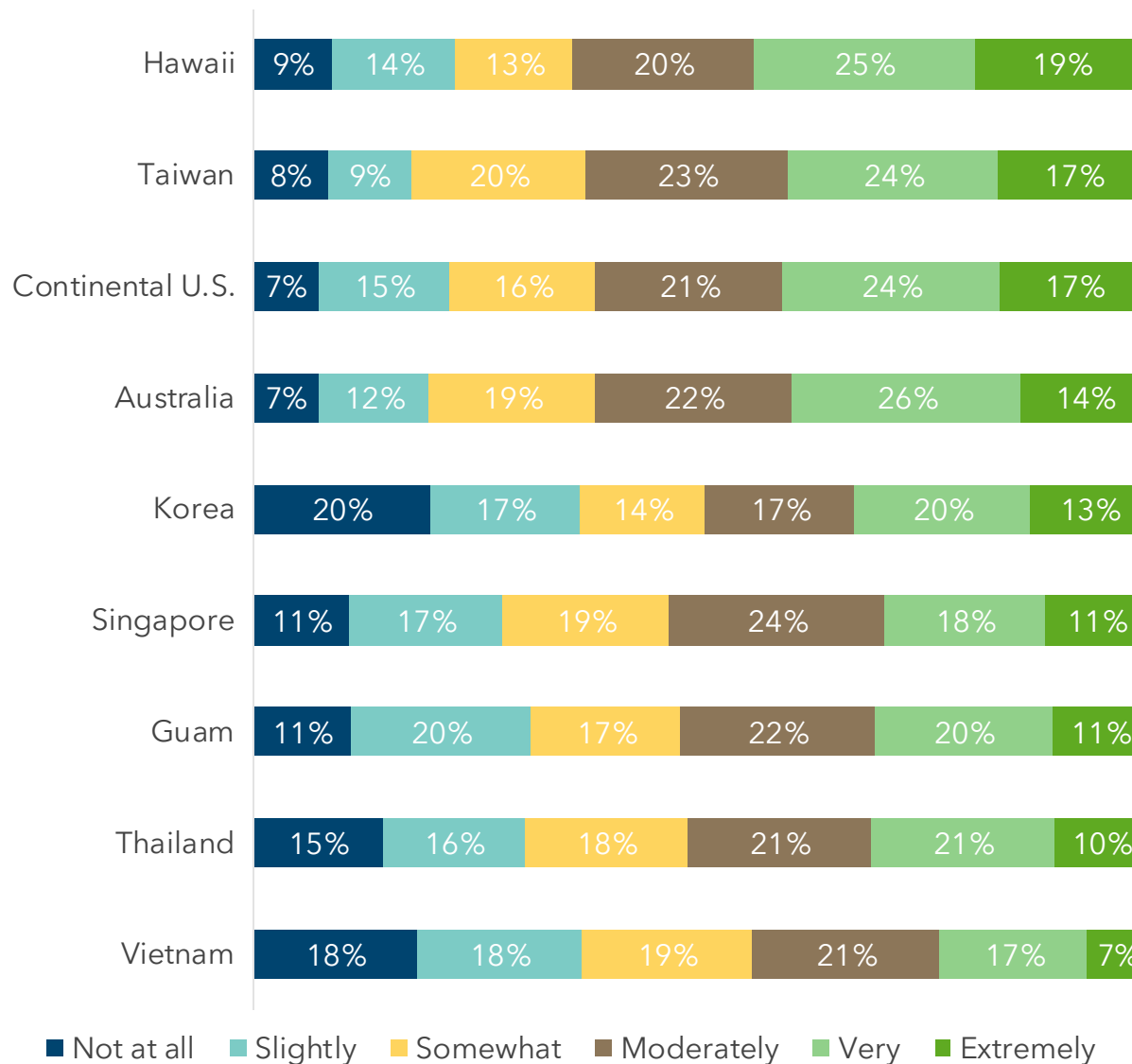
Only two attributes rated as being Opportunities among the Japan target audience – Safety and security and Clean accommodations. However, Unique local cuisine, Value for the money, and Welcoming environment also came close enough in the ratings to be considered Opportunities.



# Future Interest in Visiting Destination Japan

Consistent with Guam's low level of visits since 2021, the island also ranks low in interest in future visits.

About one-third (31%) of Japan overseas travelers are extremely/very interested in visiting Guam in the next two years – a level of future travel interest on par with Thailand (31%) and outpacing only Vietnam (24%) within the competitive set.





# Taiwan Overseas Travelers

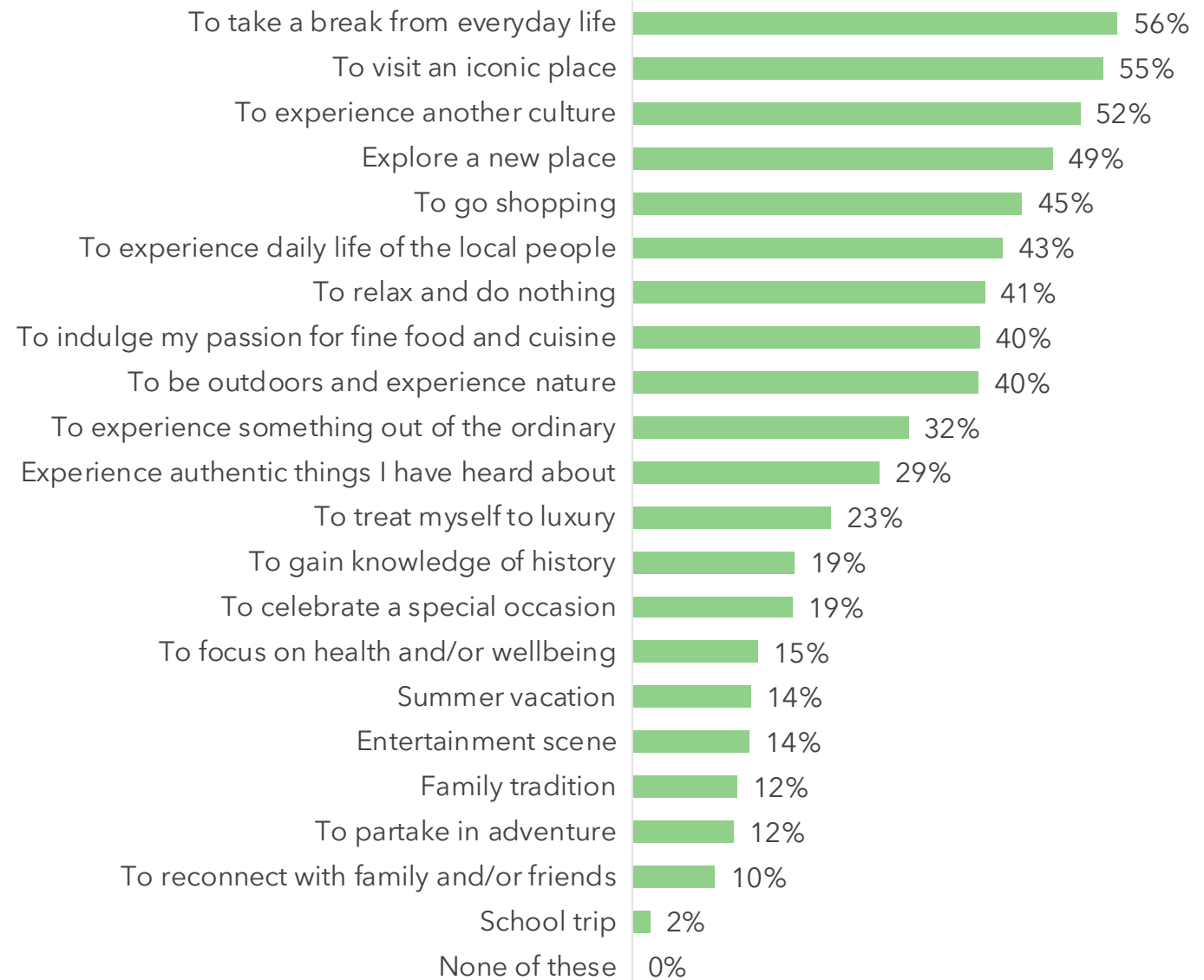
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# Overseas Leisure Travel Motivations Taiwan

When Taiwan overseas travelers go on vacations, they seek a break from everyday life, visits to iconic places and opportunities to experience another culture.

While overseas vacations are indeed about escape, they are equally about experience.

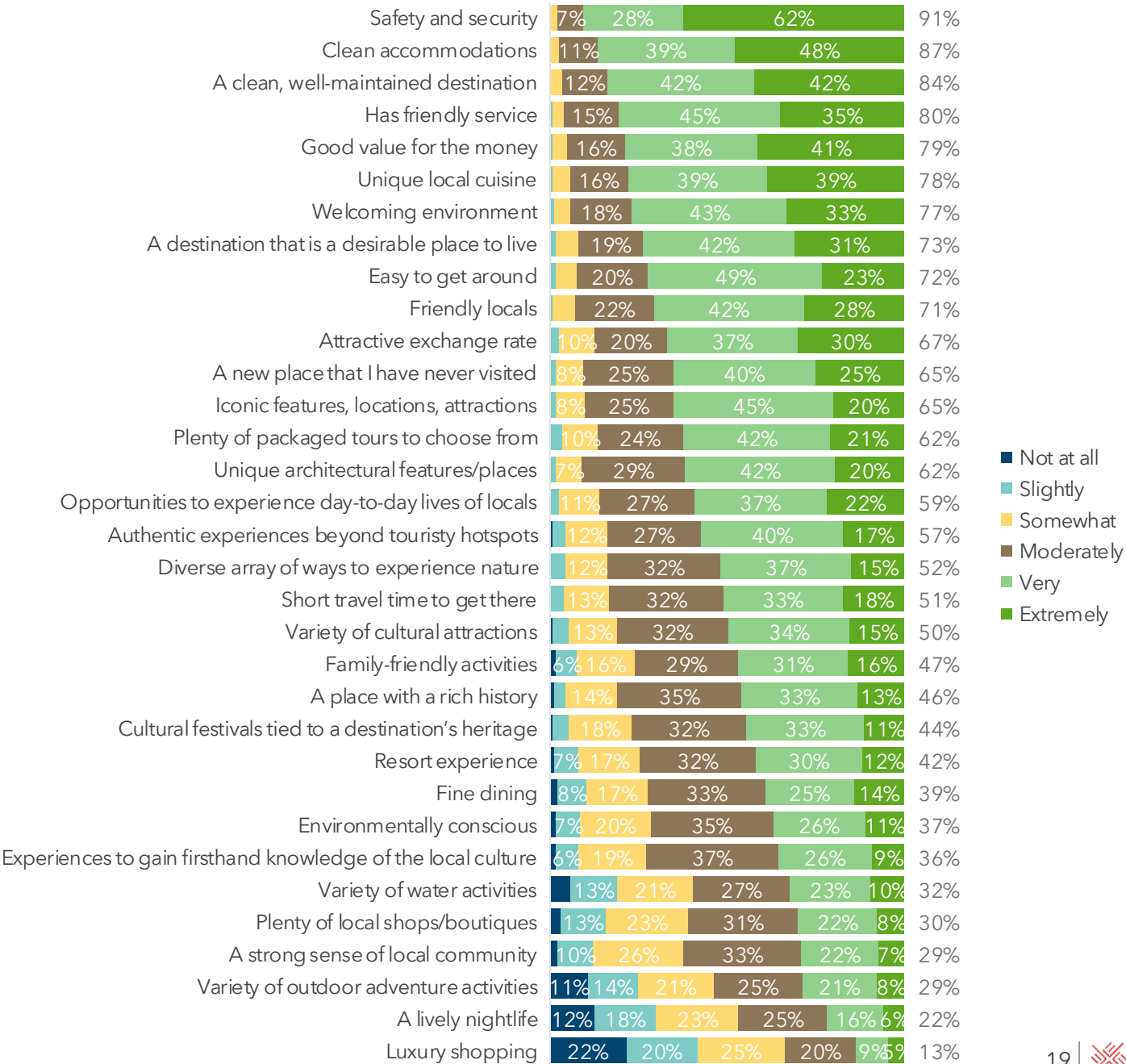




# Desired Overseas Vacation Destination Attributes Taiwan

To satisfy their desire for a break from everyday life, Taiwan overseas travelers seek out destinations which are safe and secure, offer clean accommodations, are clean and well-maintained, with friendly service, good value for the money and unique local cuisine.

By comparison, resort experiences, outdoor/water activities and luxury shopping rank lower in overseas travelers' preferences.

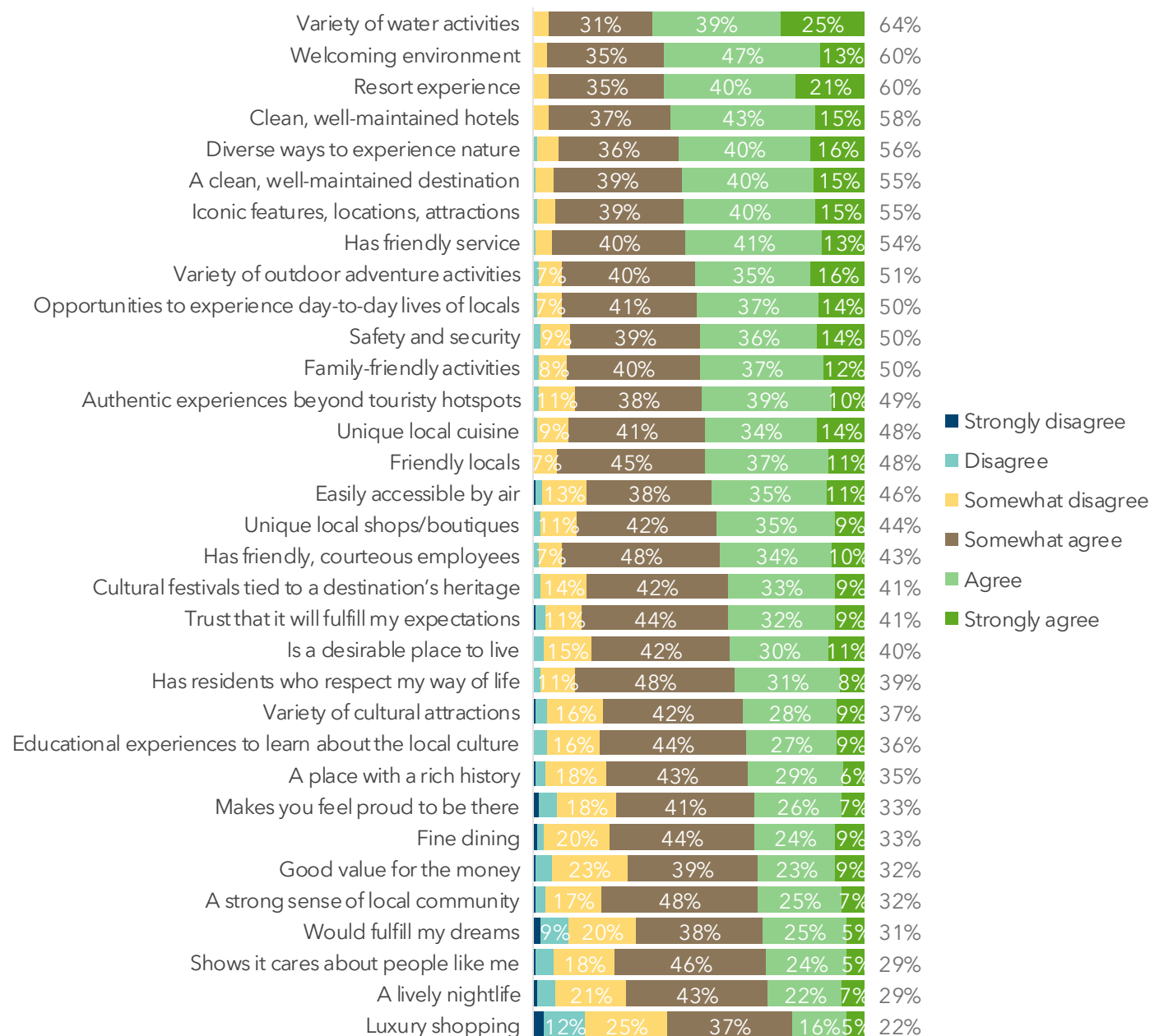


# Guam Ratings on Destination Attributes Taiwan

As Taiwan overseas travelers search for destinations to escape their everyday lives, they perceive Guam most strongly as a destination with a variety of water activities, a welcoming environment, resort experiences, clean, well-maintained hotels and diverse nature experiences.

The top desired destination attribute (i.e., Safety and security) appears lower in Guam's ratings.

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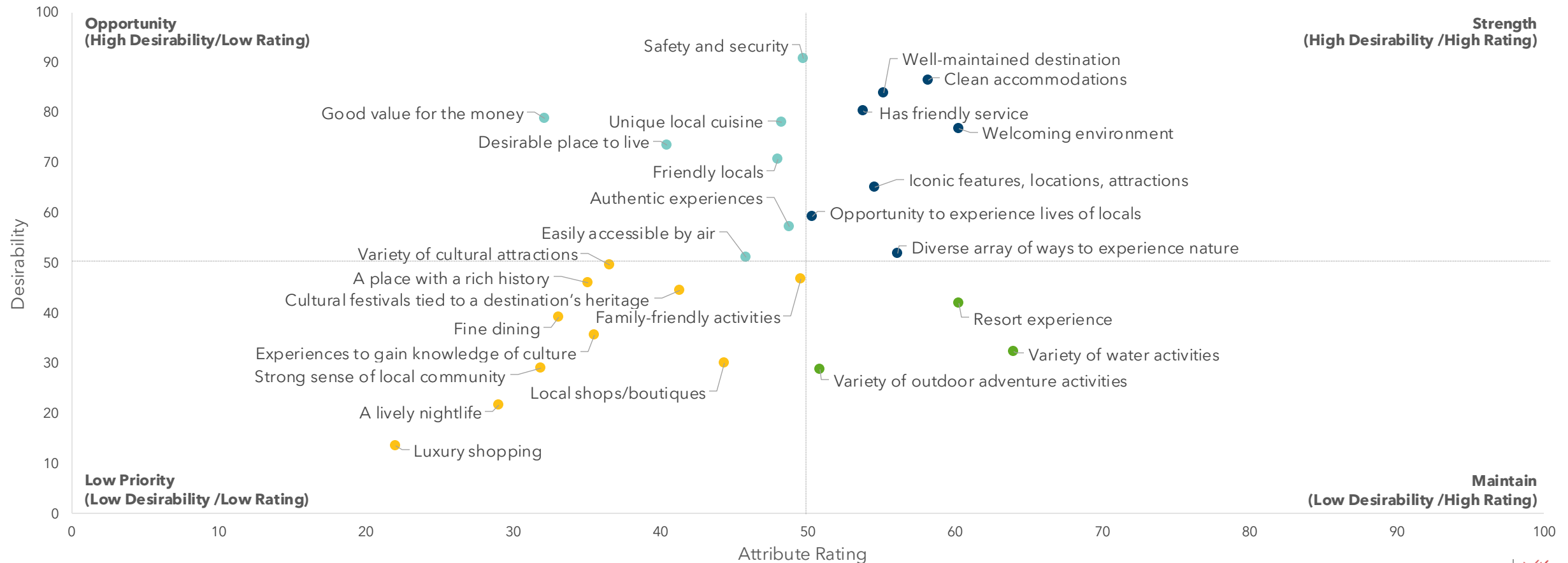




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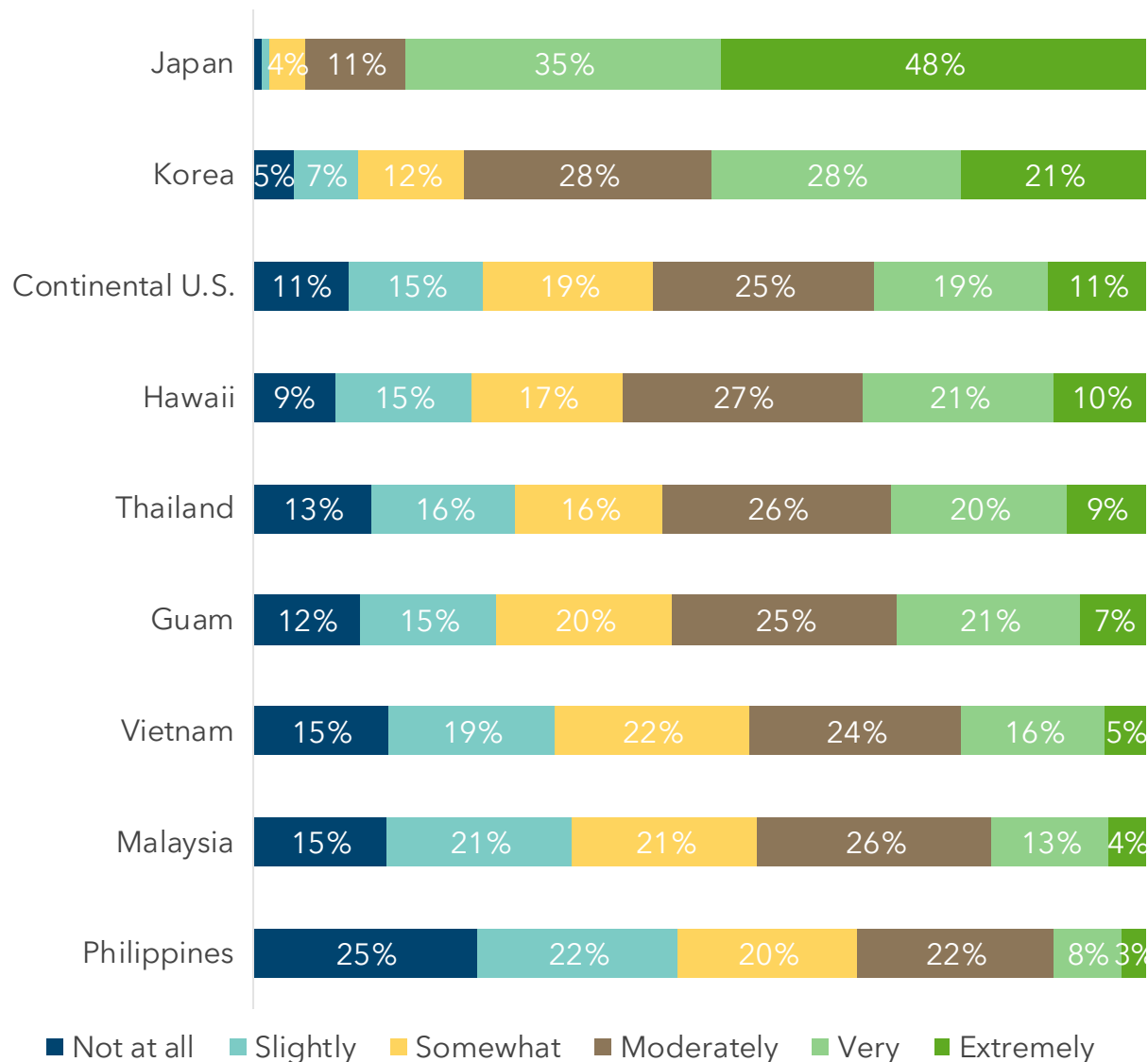
Of the 14 attributes rated as being desirable among the Taiwan target audience, Guam received high ratings on seven of them. The opportunity to improve perceptions on Safety and security exists, which is the most desirable destination attribute.



# Future Interest in Visiting Destination Taiwan

Fueled in part by the desire for new overseas travel experiences, Taiwan travelers rank Guam relatively higher in terms of future travel interest, compared with the island's lower ranking in terms of past visitation and familiarity.

About three-in-ten (28%) Taiwan overseas travelers are extremely/very interested in visiting Guam in the next two years – a level of interest which puts the island around the middle of the competitive set.





# Recommendations

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**Product Development/Marketing:** Focus product development/marketing efforts on a mix of Safety/Security, Destination Maintenance, Local Cuisine/Culture

**Beyond the Resort Experience:** Build beyond Guam's strong resort/watersports positioning by strengthening perceptions of the island's iconic features, cuisine and cultural offerings and unique quality of life.

**Focus on South Korea:** Prioritize near-term marketing efforts on building travel from Korea.

**A Happy Place to Live is a Happy Place to Visit:** Integrate input from Guam's industry, community and resident stakeholders alike into Guam's brand development efforts.





# A Happy Place to Live is a Happy Place to Visit

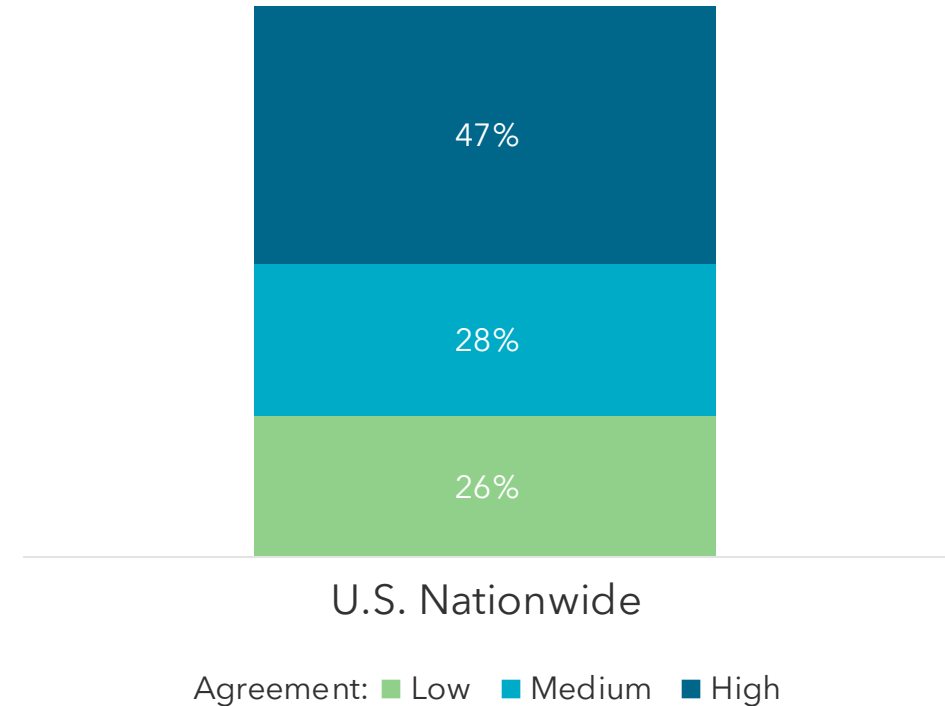
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Travelers are attracted to places where local residents enjoy a desirable quality of life.

Destinations are becoming more conscious of the benefits and problems created by tourism.

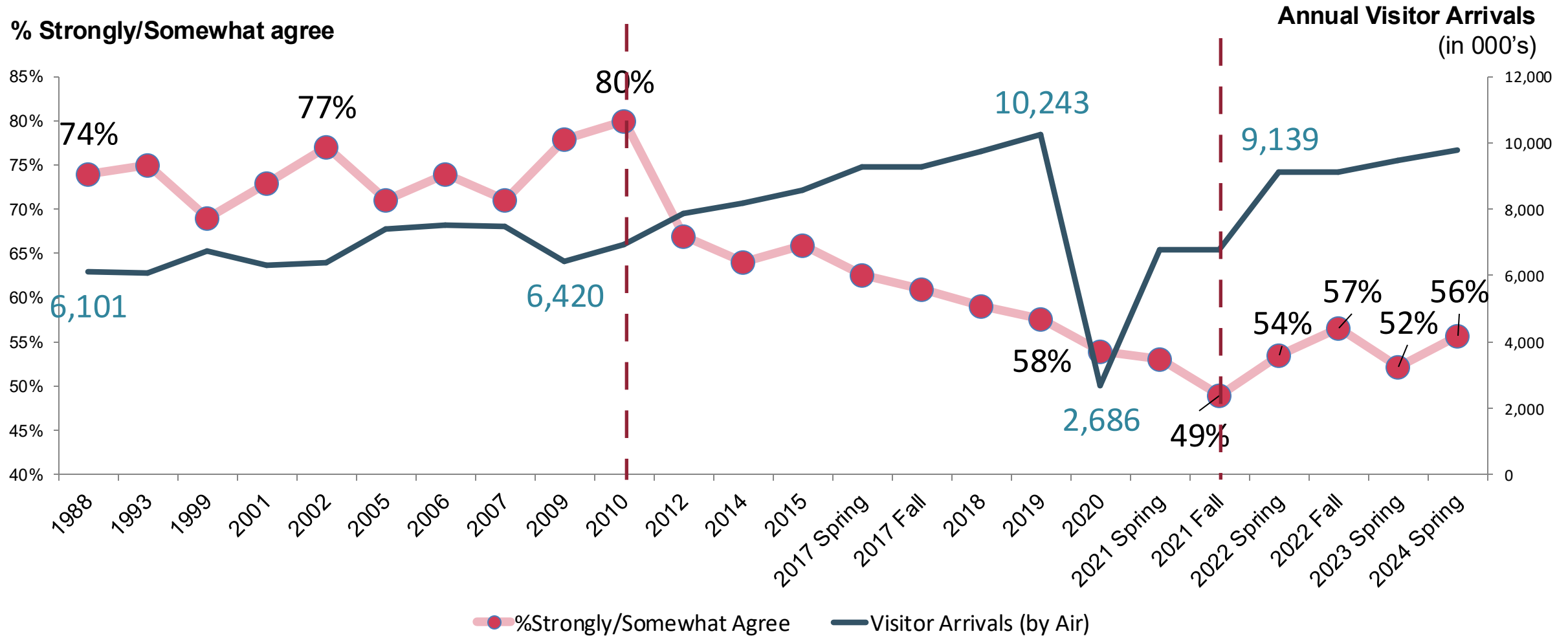
It's all about Balance.

## Benefits of Tourism Outweigh the Negatives



Source: Omnitrak Syndicated Resident Sentiment Study, CY 2024.

# *“Tourism has brought more benefits than problems” rises*



Q.4. How much do you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All.

Note: % that Strongly/Somewhat Agree defined as Rating of 6 to 10 on 10-point scale.

Source: DBEDT 2024 Hawaii Resident Sentiment Study



# Aloha!

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