

TOGETHER, WE CAN

TANA SIÑA

2022 GUAM VISITORS BUREAU ANNUAL REPORT

GVB + DPHSS

Support Visitor Travel

78TH LIBERATION PARADE

The strength to overcome,
the faith to persevere!





— ENJOY OUR ISLAND'S NATURAL BEAUTY —

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- Super Taste, a popular television show in Taiwan, filmed four episodes on Guam. The four hosts and crew were on Guam from August 30-September 13, 2022.



27 VSO PROGRAM

The Visitor Safety Officer (VSO) program was established in 2014 to provide the presence of a concierge and safety to the foot traffic of Tumon, our tourism district.



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- SOUTH KOREAN MARKET**
- Filming special Guam episodes of the mukbang TV show "Tasty Guys."



Photo by Noemi Kuroiwa



THE TOURISM & TRAVEL INDUSTRY IS RECOVERING!

A Special Message from the Governor & Lt. Governor of Guam

Håfa Adai!

In the past year, we saw the exciting beginning of recovery for the world's tourism and travel sectors.

Prior to the pandemic, this industry was one of the world's largest sectors, accounting for 1 in 4 of all new jobs created, 10.3% of all jobs, and 10.3% of global GDP. Reports indicate the Asia Pacific market may be the only one in the world to recover by 2023, and our administration is adamant about capturing this potential.

The future outlook is positive as this sector has shown resilience and the ability to bounce back. Restrictions have eased across the region and in Guam's top tourism markets of Japan, South Korea, the Philippines and Taiwan. Fiscal projections point to a strong period of growth in the industry's job market and revenue streams.

While government support is instrumental, the swift recovery of the sector is only possible if we work together and build a clearer path to a more sustainable and inclusive industry. As the top contributor to Guam's economy, accounting for more than 21,000 jobs and over \$260 million in revenue, we cannot fail in tourism.

On behalf of the Island of Guam, we are proud to support the Guam Visitors Bureau and their mission to promote and develop Guam as an exceptional global destination. In doing so, we will ensure the maximum benefit for the people of Guam, and put our island at the front and center of the visitors' choice.

Un Dångkulu Na Si Yu'os Ma'åse'!

Lou dem Guerrero
Lourdes A. Leon Guerrero
Maga'hågan Guåhan
Governor of Guam

Joshua F. Tenorio
Joshua F. Tenorio
Sigundo Maga'låhen Guåhan
Lieutenant Governor of Guam

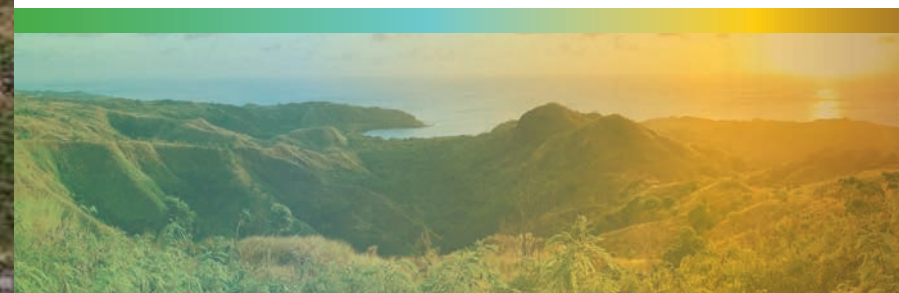




Photo by Stanley Dela Cruz

MESSAGE FROM THE SENATOR



HÅFA ADAI!

With its long history, unique culture, beautiful landscapes, and friendly people, Guam has welcomed visitors for years with its Hafa Adai spirit that has contributed to the creation of a vibrant tourism industry. Tourism is a cornerstone of the island's economy, providing thousands of jobs for our local community while promoting our island to visitors from around the world. Even in times of uncertainty, the Guam Visitor Bureau (GVB) has proven its dedication and commitment to our island and people.

During the pandemic, GVB diligently laid the groundwork that has contributed to the considerable progress that our tourism industry experiences today. GVB has played a direct role in the rebuilding and revitalization of our tourism industry, having promoted our local businesses and supported them throughout these trialing years. As we welcome tourists back to our island paradise, we must remember the Bureau's innovation and resilience that has led us to this very moment.

It is you, the Members, Management, and Board of GVB that have contributed to making Guam a premium destination within the Pacific. We are excited to continue working together towards creating a thriving and sustainable visitors industry for Guam.

Respectfully,



"Tourism is a cornerstone of the island's economy, providing thousands of jobs for our local community"

AMANDA LEE SHELTON
Senator, 37th Guam Legislature
Legislative Secretary, Majority Leader, & Chairwoman
of the Committee on Maritime and Air Transportation,
Parks, Tourism, Higher Education and the Advancement
of Women, Youth, and Senior Citizens

MESSAGE FROM THE CHAIRMAN



HÅFA ADAI!

Fiscal Year 2022 became the tail end of the COVID-19 pandemic, with the team at the Guam Visitors Bureau working through the many challenges that it brought in trying to recover our number one industry. It took the collective efforts of working with our key partners to rebuild our tourism workforce and reestablish our presence in the visitor markets.

GVB invested a considerable amount of time and effort into programs, events, emerging flight routes, trade shows, and familiarization tours that showcased our island in 2022. From the Guam Safe Travels Stamp program and Fandanña Fridays, to free COVID testing sites for travelers and the return of the Guam Island Fiesta Tour, the team worked hard to create a safe and welcoming environment that tourism can begin to thrive in again.

In the visitor markets, GVB reconnected with the people and places that shared a rich history with our island. Throughout this pandemic era and even the recent recovery from Typhoon Mawar, our island community has proven time and again its resilience in the face of adversity.

I want to personally extend my heartfelt gratitude to the hard-working women and men in the tourism sector. Your unwavering commitment and strength have been instrumental in this recovery process. We all yearn for a return to a better sense of normalcy, striving to celebrate our unique way of life with each other and our visitors. Our board is firmly determined to see this recovery through and enhance the services that make our island shine.

With an abundance of hope, we believe we are on the cusp of a new era in tourism—one that beautifully displays our 4,000-year-old CHamoru culture while maintaining a safe, clean, and family-friendly environment. Our mission to make Guam a better place to live, work, and visit remains steadfast. Together, we will forge ahead towards a brighter and more prosperous future for everyone who calls Guam home.

Si Yu'os Ma'åse',

GEORGE CHIU
Chairman, GVB Board of Directors

"We all yearn for a return to a better sense of normalcy, striving to celebrate our unique way of life with each other and our visitors."

BOARD OF DIRECTORS



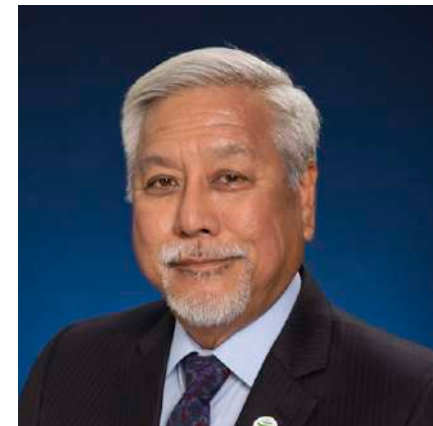
JOAQUIN COOK
(Vice Chairman)



JEFFREY JONES
(Secretary)



HO EUN
(Treasurer)



MILTON MORINAGA



P. SONNY ADA



MARY RHODES



PAULA MONK



MAYOR ROBERT HOFMANN

 FORT NUESTRA SEÑORA DE LA SOLEDAD, HUMÅTAK



**MANAGEMENT'S
DISCUSSION &
ANALYSIS**

MANAGEMENT'S DISCUSSION & ANALYSIS

ABOUT THE GUAM VISITORS BUREAU

The Guam Visitors Bureau (GVB), a non-profit membership corporation, is the official tourism agency for the U.S. Territory of Guam. Among its responsibilities, GVB is charged with setting tourism policy and direction; developing and implementing Guam's tourism strategic and marketing plans; managing programs and activities that enhance and showcase Guam's people, place and culture in order to deliver an incomparable visitor experience; and coordinating tourism-related research, planning, events and outreach activities. GVB serves as a critical bridge linking government, the tourism industry, visitors and the local community, and aims to contribute successfully to a good quality of life for residents through tourism.



Photo by Noemi Kuroiwa



Photo Vera C. Tangsemal Chimereg



**HONORABLE
CARL T.C. GUTIERREZ**
President and CEO

MANAGEMENT HIGHLIGHTS

Tourism recovery accelerated globally in 2022, ending at 63% of pre-pandemic levels. The Middle East, Europe, and Americas led the recovery at 83%, 79%, and 65%, respectively. However, the Asia Pacific region lagged at 23% because of the strictest and ubiquitous pandemic border controls discouraging international travel. Even more significant to us is the anemic 10% pre-pandemic recovery of Northeast Asia, specifically Japan, Korea, and Taiwan. These countries combined represent the island's largest market nexus and account for 90% of all visitor arrivals.

and, specifically, 2025 in our case and the Caribbean Islands.

Total arrivals in Guam for all markets in FY2022 were 216,915 and reflect the lingering effects of the COVID-19 pandemic. Cautious travel consumer sentiment, domestic tourism focus, and weaker currencies in our NE Asian core markets have all contributed to this glacial rate of recovery. On the other hand, arrivals from the U.S., Philippines, and Korea have either breeched or exceeded 50% of pre-covid numbers, giving us reason for optimism in meeting our 2023 and 2024 forecasts.

The anticipation of scheduled air service from Taiwan is still several months away and, according to GVB sources, not likely to start before year end 2023. Because of this, we are currently supporting the ongoing charters being sold by Lion Travel, one of Taiwan's largest companies in the travel industry.

Seat capacity for 2023 is projected at 1,350,273, which is an increase of 100% over 2022. Airlines are gearing up to meet anticipated demand and some are either restoring service or adding service to existing routes.

Bureau. The BRCC consists of GVB Director Jeff Jones, President & CEO Carl T.C. Gutierrez, and Vice President Gerald S.A. Perez, and advised by University of Guam Professor Ron Aguon and GVB Counsel Joe McDonald. The BRCC provides oversight for the Bureau's corrective actions.

Corrective Action Planning is used by the BRCC as a control oversight of material risks to the Bureau. It identifies specific corporate, administrative, regulatory, legal, and compliance/control risks and assigns a level of materiality to them. Higher-level risks need ongoing monitoring and immediate corrective action. Lower-level risks are less so.

corrective action to be taken on them. As part of the planning process, CAPs schedule target dates for important milestones to controlling risks, including the date that a control over the identified risk is implemented. The BRCC assists the President & CEO in his chief administrative officer role by creating continuing oversight of the Bureau's control over its CAPs.

The BRCC does not play a direct role in the members' governance over issues, risks, or corrective action associated with director elections and the Board's bylaws. Any such undertaking is the membership's, within the corporate structure provided for in the enabling act. Corporate governance through GVB's bylaws and its board of directors begins and ends with the members. The enabling law permits members to meet to conduct membership business. That business includes elections of four (4) Directors to the Board. Members are also authorized to adopt, amend, repeal, and enact bylaws. However, members may delegate this authority to a Board of Directors by a 2/3 vote.



DR. GERALD "GERRY" S.A. PEREZ
Vice President

We are making steady progress and are tracking the outbound travel trends of our source markets, with Korean arrivals beating the market trend benchmark and leading recovery. To date, Guam's tourism pre-pandemic recovery was 3.8% in 2021 and 28.6% in 2022, with a 40% forecast in 2023, and an optimistic 70% in 2024.

The outlook for FY23 is for arrivals to continue an upward trend tracking or exceeding the international departures in Japan, Korea, and Taiwan, which are generally below 60% of pre-pandemic volume. This positive trajectory is being facilitated by relaxed travel restrictions, industry trade groups such as the Japan Association of Travel Agents (JATA), and an aggressive GVB third and fourth quarter marketing agenda in Japan and Korea.

The UN World Tourism Organization (UNWTO) and Pacific Asia Travel Association (PATA) do not see full recovery in our region until 2024

BUSINESS RISK COMPLIANCE AND CONTROL

The President & CEO is the Bureau's chief administrator with primary responsibility for development, operation, maintenance, and administration of the Bureau's business affairs. The GM created the Business Risk Compliance and Control Committee (BRCC) to help oversee ultimate administrative responsibility on behalf of the



MARKETING

The marketing department has shifted its focus to tourism recovery. Limited marketing dollars are carefully carved depending on travel conditions from each of Guam's core market sources to maximize exposure on promotional and campaign efforts. Such includes heavy digital promotions on our SNS platforms; cooperative support with the airlines to resume direct air service and/or increase capacity, as well as tie-ins with online and traditional travel agencies to boost FIT and group/MICE travels.

Global travel has resumed but post-pandemic travel attitudes are changing in that consumers are much savvier in their search for destinations offering that unique experience. Guam must compete with this and therefore needs to elevate its marketing efforts and continue to work to deliver the promise to assure a culturally centric destination offering amazing experiences.



Photo by Arlene Manejero

RESEARCH & STRATEGIC PLANNING

With nations around the world lowering travel restrictions and shifting focus to recovering from the COVID-19 pandemic, research continues to be an essential aspect in the decision-making process for our island leaders. Issues of safety and public health have become top priorities for visitors and there is greater anticipation that the global profile of travelers will continue to transform. It is the responsibility of the GVB Research & Strategic Planning Division to work with other entities to collect, analyze, and evaluate pertinent data on the visitor industry in order to provide and disseminate comprehensive statistics for the benefit of our island.

Visitor Forecasts

Visitor arrivals for FY2023 are projected to reach 670,000 or about 41% of pre-pandemic levels. Korea is expected to lead the recovery with around 51% of 2019 levels recaptured in 2023, while Japan and Taiwan are expected to

lag behind with only 20% and 32% respectively. Seat capacity to Guam for FY2023 is recorded at 1.3M seats from all markets. This represents only 60% of the total seats to the island in 2019 (pre-pandemic). Total arrivals anticipate a total load factor across all markets of around 49% of available seats to the island.

One Village One Attraction

In order to move tourism recovery efforts even further, the Research & Strategic Planning Division is focused on enhancing and developing our destination as well as the experiences captured on island. Our "One Village, One Attraction" Initiative is designed to develop unique cultural attractions across the 19 villages of Guam. These new attractions are being developed and designed in collaboration with the Mayors Council of Guam, to ensure the community plays a key role in determining the attractions developed within each community. Our goal is to create new economic opportunities for our people, enhance the visitor's experiences, and perpetuate our island's unique culture.



As the visitor industry continues to evolve to address the new travel demands in a post pandemic environment, the Research & Strategic Planning Division is committed to providing innovative strategic initiatives and programs driven by valuable data and analytics on Guam's visitor industry. In the more than 20 years since its creation, the GVB Research & Strategic Planning Division has consistently implemented the core projects outlined in its enabling legislation by producing over 300 statistical reports, conducting and issuing information for more than 460+ visitor surveys analyzing responses of visitors from our major source markets, producing reports on the visitor industry labor market and analyzing data obtained from the arrival forms completed upon entry to the destination.

CULTURAL HERITAGE, BRANDING AND COMMUNITY OUTREACH

Guam's culture plays a significant role in the island's attractiveness as a tourist destination. It is the Bureau's policy to actively maintain and provide avenues for the continued development and strengthening of our culture and heritage; in part to ensure that tourism is consistent with the cultural philosophies of our community.

GVB restarted its PCR testing program for visitors upon their return home. This program aimed to alleviate the COVID-19 testing cost in the new age of travel. This is a key competitive advantage to attract more visitors to Guam. The cost covered one PCR test per person, per week. In June 2022, four (4) testing sites were included: Hotel Nikko Guam, The Plaza, Hyatt Regency Guam and the Pacific Island Club.

DESTINATION DEVELOPMENT AND MANAGEMENT

Collaborating with public and private institutions impacting the social, economic, and environmental dimensions of tourism is a major responsibility of the Destination Development and Management. The central goal of this department is delivering and exceeding the unique visitor experience promised in the marketing message conveyed to potential customers. And this goal is achieved by showcasing our cultural heritage, organizing exciting world-class events, and good stewardship of key infrastructure facilities that add value to the visitor experience and contribute to the safety and security of visitors and residents alike.



Photo by Terry M. Taylor

CAPITAL ASSETS AND LONG-TERM DEBT

The Bureau is not capital intensive and therefore, significant capital asset activity did not occur in fiscal year 2022 or 2021. For additional information regarding capital assets, please refer to Note 5 of the Financial Statements.

Additionally, the Bureau has no long-term borrowings.

The GVB Management's Discussion and Analysis report is current as of August 18, 2023 and is subject to change. The final report on the audit of financial statements can be viewed at the Office of Public Accountability's website at <https://opaguam.org/reports-audits/financial-audits>.

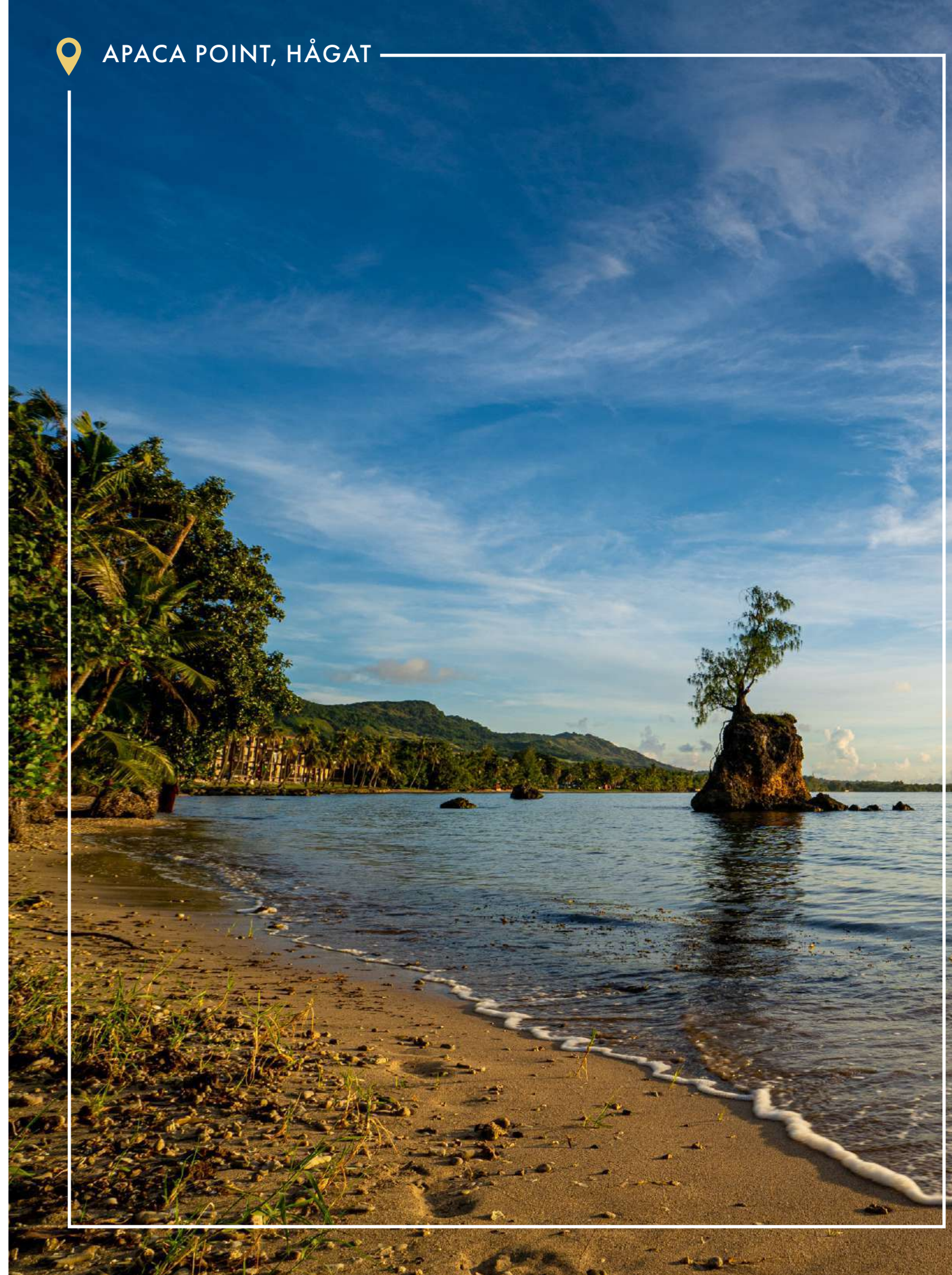


Photos by Nick Rivera

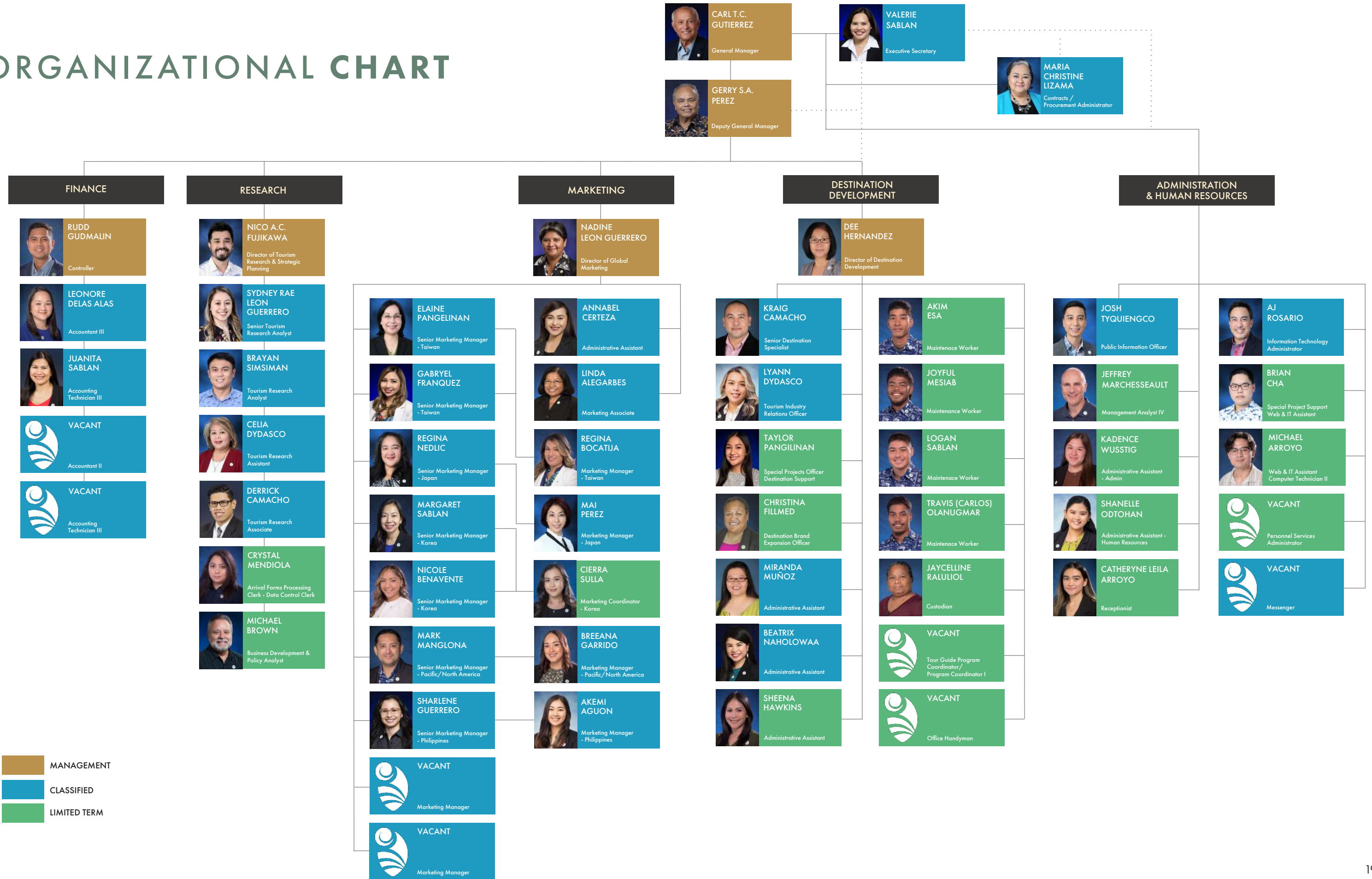


Photos by John Larimer (above) & Florencia Villagomez

APACA POINT, HÅGAT



ORGANIZATIONAL CHART



MANAGEMENT
 CLASSIFIED
 LIMITED TERM

 GUAM MUSEUM, HAGÁTÑA



Collaborating with public and private institutions impacting the social, economic, and environmental dimensions of tourism is a major responsibility of Destination Development and Management. The central goal of this department is delivering and exceeding the unique visitor experience promised in the marketing message conveyed to potential visitors. And this goal is achieved by showcasing our cultural heritage, organizing exciting world class events, and good stewardship of key infrastructure facilities that add value to the visitor experience and contribute to the safety and security of visitors and residents alike.

DESTINATION DEVELOPMENT

DESTINATION DEVELOPMENT

The objective of the Guam Visitors Bureau (GVB) Destination Management Committee (DMC) is to identify projects and programs that will enhance Guam's visitor experience and improve the quality of life for island residents. While capital improvements are necessary to reinvigorate our product, consistent and effective maintenance is just as important in keeping a safe and positive image of Guam.

DMC focuses on improving tourism infrastructure, safety, and satisfaction. Over the years, the Bureau has taken on an increased role in the upkeep of Guam's main tourist corridor, San Vitores Road. In FY2021, GVB oversaw the maintenance of major tourist infrastructure to include San Vitores Road, Tumon and Hagåtña Bays, Island Roadways, Tumon Bus Shelters, Sidewalks and Tree Mitigation. To guarantee quality standards, GVB contracts a Quality Assurance Manager to ensure the protection of GVB's investment and to uphold a close relationship with GovGuam entities and the private sector to address and resolve issues, as well as an Architectural and Engineer Consultant to oversee Capital Improvement Projects.

BEACH CLEANING MAINTENANCE

Maintenance of Hagåtña Bay (from Apotguan Beach Pavilion) to Onward Hotel and Tumon Bay (from Hilton to Gun Beach). Scope of work includes mechanical and manual beach raking, trash collection, tree and ground cover trimming.



CONTRACT ADMINISTRATION AND INSPECTION SERVICES

The success of GVB contracts relies on a Quality Assurance Inspector to make certain that the scope of works is kept to standard. It includes overall infrastructure inspection and coordination with GovGuam agencies to ensure safety issues are addressed in a timely manner.

PLANNING & ARCHITECTURAL-ENGINEERING SERVICES

The WB Flores consultant possesses technical expertise and management capabilities to oversee Capital Improvement Projects meant to encourage more investment into the tourist district

and to spur additional economic activity for the benefit of the people of Guam.

INSURANCE CLAIMS

GVB, with the assistance from the Guam Police Department, collects police reports for accidents occurring along Pale San Vitores Road that damage GVB infrastructure (i.e., landscape and hardscape). If a police report is available, GVB files a claim against the insurance to recoup costs for repairs.

ISLAND ROAD MAINTENANCE

Maintenance of Rt. 1 (Dededo Flea Market to Naval Station), Rt. 2A and 2 (Naval Station to Cetti Bay), Rt. 16 (Rt. 1 to Harmon McDonald's), Rt. 4 (Rt. 1-Chalan Laman, Inarajan) and



Rt. 34 (Two Lovers Point). Scope of work includes trash collection, grass cutting, scraping, edging and trimming.

TUMON BUS SHELTERS

Maintenance of total of 12 bus shelters at GVB, PIC, Across PIC, Fountain Plaza, Across Hyatt, Pacific Bay/Churrasco, Westin, Cracked Egg, Pacific Place, Holiday Resort, SandCastle and Lotte Hotel. Scope of work includes wiping down the shelters and keeping the structures graffiti-free.

TUMON LANDSCAPE MAINTENANCE

Maintenance of Pale San Vitores Road from Archbishop Flores Rotunda to Lotte Hotel, including JFK and Westin hills. Scope of work includes tree and shrub trimming, grass cutting, sweeping/blowing of sidewalks, trash collection (including bus shelter trash collection).

TREE MITIGATION

Proper pruning of trees along San Vitores Road to manage tree health, provide clearance, improve tree structure, and reduce the risk of branch failure. This includes the removal of trees that are dead, declining in health, interior decay, or roots pose a serious threat to infrastructure.

ANTI GRAFFITI

GVB has actively been involved in the Anti-Graffiti campaign by immediately responding to tagging of public infrastructure. Scope of work includes Pale San Vitores Road, San Vitores Road, Fujita Road, JFK Hill, Westin Hill, Carlos Camacho Road, Farenholt, Chalan San Antonio, Bishop Flores Rotunda, and Route 1 from Micronesia Mall intersection to Paseo.



Photos by Eling Cabinta (above) and Layla Sibetang

SPORTS & EVENTS

With the slow easing of COVID-19 restrictions in 2022, the Guam Visitors Bureau carefully reintroduced tourism sponsored events and activities as the island rebounds from the effects of the COVID-19 pandemic in 2020 and 2021.

FY2022 SPONSORED EVENTS

- Fandanña Friday Liberation Family Event
- GSPN Volleyball Clinics
- Gregorio Perez Fishing Derby
- ITF World Tennis Federation, Inc.
- Liberation Day Parade
- Mås Metgot Strongman Competition
- Marianas Open Jiu Jitsu Tournament
- Påtgon Jiu Jitsu Tournament
- Reggae in Paradise Concert
- Sea Slayer Fishing Tournament
- Shut Up & Fish Mahi/Wahoo Tournament
- Tour of Guam/Pacific Cup Cycling Event
- Umatac Fiesta
- Valley of the Latte River Festival
- Yoña Fiesta

It's no secret that the industry was hit hard in 2020 and 2021. However, increased pent up demand to travel to attend overseas outdoor, sporting, leisure and recreational activities is on the rise!

Although still a shell of what it once was, the Bureau's reintegration of value-added tourism activities and events look toward the eventual revival of the Guam Ko'ko' Road Race and the Guam Micronesia Island Fair in 2023.



CULTURAL HERITAGE, BRANDING & COMMUNITY OUTREACH



Photos by Andrea Murer

The Cultural Heritage, Branding and Community Outreach is the division that ensures Guam's culture is represented in GVB's local and overseas promotions. Ensuring that Guam's cultural representation is accurate and that the cultural experience of visitors receive is consistent with the philosophies of our community. This division is tasked to provide a glimpse of Guam's cultural experience in GVB's promotional efforts, both locally and abroad, and to promote, support and facilitate the revitalization and display of Guam's heritage, cultural values, and natural history.

The Guam Visitors Bureau brought back its weekly #InstaGuam photo and video contest. The contest was part of GVB's popular #InstaGuam theme that promoted Guam as an instant destination from its major source markets while encouraging

residents and visitors to create their own story-driven content through the power of social media. The #InstaGuam hashtag has also grown to over 210k posts over the past three years since the original campaign launched in 2018.

The Guam Visitors Bureau (GVB) continued to serve as the official organization to advocate for the implementation of the Safe Travels protocols in Guam and continued to issue the WTTC SafeTravels stamp to local businesses. GVB established the Guam Safe Certified x WTTC SafeTravels marketing campaign, which endorses businesses that follow both, local and global, health and safety protocols.

To enhance readiness among our industry stakeholders, GVB in collaboration with Guam Department of Homeland Security and the Guam Hotel & Restaurant

Association developed the Crisis Management Storm Tool Kit. The toolkit has storm safety graphics available in English, Japanese, Korean, and Chinese as well as preparedness messages that can be shared on social media channels or display monitors.

In working closely with the GVB's Marketing Department, the Cultural Heritage, Branding and Community Outreach provides cultural presentations in the form of song and dance as well as various craft demonstrations. Our Chamoru entertainers are our most valued marketing assets at these international shows. Their presence generates free media exposure for our island. While our brochures may describe Guam's unique culture, experiencing it leaves a more lasting and better impression.

VISITOR SAFETY & SATISFACTION INDUSTRY REPORTS



SUMMARY

Visitor Safety & Satisfaction is tasked to address issues that directly affect the experience of our visitors. The core objective of Visitor Safety & Satisfaction is to maintain Guam's reputation as a safe destination and provide quality control measures that will ensure a positive experience for our guests that will encourage new and repeat visitors.



VISITOR SAFETY OFFICER PROGRAM

The Visitor Safety Officer (VSO) program was established in 2014 to provide the presence of a concierge and safety to the foot traffic of Tumon, our tourism district. Throughout the years, the program has seen great success in perpetuating the Håfa Adai spirit to both residents and visitors while also serving as a crime deterrent. The VSOs also protect government infrastructure by preventing vandalism and defacement of public property and utilities.

In 2019 the program was expanded to our capital city of Hagåtña and made a major impact in improving visitor relations beyond Tumon.

The VSOs have been an invaluable asset and have saved lives by

assisting in over 60 water safety incidents in Tumon Bay within the last three fiscal years. The VSOs work to support the efforts of the Guam Police Department and the Department of Parks & Recreation's Park Patrol unit. Between FY2022 to February 2023, the VSOs provided over 33,000 safety and security advisories to patrons within Tumon.

The VSO program is a community program that serves to uphold Guam's reputation as a safe and family friendly-destination. The program prides itself in the VSO's level of professionalism with many VSOs upholding skill sets that range from customer service, tourism relations, military and law enforcement training. They are frontline Håfa Adai ambassadors who demonstrate our island's renowned spirit of hospitality through their presence.



TOUR GUIDE CERTIFICATION PROGRAM

GVB monitors tour guides and tour sites throughout Guam. The Tour Guide Certification Program was formed under Public Law 23-136 and requires the training and certification of all Guam tour guides. This law requires GVB to establish guidelines regulating the conduct and operations of tour companies, inclusive of personnel.

In FY2021, GVB partnered with the Bureau of Statistics and Plans (BSP) to develop the curriculum for the first-ever launch of the Marine Tour Operator certification program. The course curriculum covers professional standards, marine biology information, safety guidance, and strategies for reef-safe marine tourism. In FY2022,

(20) marine tour operators successfully completed the course and became certified GVB Marine Tour Operators.

The program is modernizing through the continued development of virtual tour guide and marine tour operator learning modules and education assets.

VISITOR CONCIERGE PROGRAM

In difficult times our visitors often lack direction to resources and information which compounds the trauma of their situation. The Visitor Concierge Program was conceptualized to provide a support system to provide the appropriate care, communication and resources necessary to navigate visitors through difficult periods.

Throughout the years, the program has seen great success in perpetuating the Håfa Adai spirit to both residents and visitors while also serving as a crime deterrent.



The program's assistance includes but is not limited to:

- Assisting translation and interpretation services.
- Assisting visitors who have been victimized by crime.

This essential service is supported by a locally based contracted company. The program is a key communication tool that reinforces Guam as a safe destination. It is also a resource that can be integrated into Guam's safety protocols.

TWO LOVERS POINT, TAMUNING

Photo by Marixi Thiem



The Marketing Department is responsible for aggregating a coherent set of messages that are segmented to generate volume, maximize yield, encourage diversification, and promote local business opportunities. Social media, communication with government officials, collaboration with industry stakeholders, and participation at trade events are the vehicles used to promote Guam as a superior alternative to the competition. And the adhesive, or brand identity, used to bring market operators, sales distribution channels, and consumers together is the differentiated attribute that make Guam stand out as a desirable travel destination.

MARKETING DEPARTMENT

MARKET: JAPAN

レストランでも!!!!

スパでも!

スパでも!

ゴルフでも!!

お買い物でも!!!

ホテルでも!!

アクティビティでも!!

55th JAPAN x GUAM 就航55周年 GoGo! GUAM CAMPAIGN

#HereWeGuam

さあ、3時間半で行けるアメリカンリゾートへ。

#Here We Guam Ambassador Audition

KANNA YUIKA SHIHO TAKUYA

MINAMI

AT A GLANCE

- 7 TRADESHOWS/ CONVENTIONS
- 8 SEMINARS/ WORKSHOPS
- 10 COOPERATIVE PROJECTS
- 1 TRAVEL TRADE FAM TOURS
- 10 MEDIA FAM TOURS
- 9 ONLINE PROMOTIONS

FY 2022 **13,022** TOTAL ARRIVALS **277%** increase from last year FY21: 3,454

TOTAL MEDIA EXPOSURE	
TRADITIONAL	\$18,750,827
ONLINE	\$831,510
COMBINED (print & online)	\$19,582,337

DIGITAL MEDIA EXPOSURE		
	IMPRESSION	CLICKS
WEB	811,398	335,505
SOCIAL	35,080,000	416,000

EXECUTIVE SUMMARY

- Japan welcomed 13,022 visitors, about 6% of market share in total arrivals for FY2022, which equated to a total increase of +277% compared to last year.
 - Due to the Japanese travel restrictions, considered as one of the strictest waterfront measures of the G7 countries, the fiscal Year 2022 was challenging for Japan market as it affected travels abroad.
 - The COVID situation did not improve with the reduction of MOFA levels which was initially forecasted for the later part of FY22 (second half of 2nd Quarter to the first half of 3rd Quarter). This curtailed overseas travels in general and hindered the return of flights and group package sales by travels agents.
 - The shift in marketing activities, especially in terms of stimulating demand while anticipating the change in travel restrictions, was necessary and the GVB
- Japan team quickly focused on programs in raising awareness, promoting safety and security, and shifting the brand image of Guam from group package sales to more Free Independent Travelers (FIT) and online bookings.
- This was implemented to keep up with the strict travel requirements out of Japan while in anticipation of the easing of restrictions.
 - Digital marketing, content and real-time communication of real information on SNS sites, utilizing creative campaigns such as the #HereWeGuam branding and strengthening new sites such as TikTok ahead of other destinations, and strengthening women and Gen Z travel-related innovative marketing activities were implemented.



MARKET: JAPAN

- Demand generation, building top-of-mind awareness and communicating destination Guam's clean, safe, secure and close proximity was the focus for FY2022.
- The #HereWeGuam branding campaign communicated positive vibes with a higher number of views and engagement with a total media reach of approximately 160,000,000 and the goal of 100 million in total reach for FY2022.
- Building top-of-mind awareness and engagement with SNS followers was the direction.
- This encouraged the target for GVB's SNS to increase:

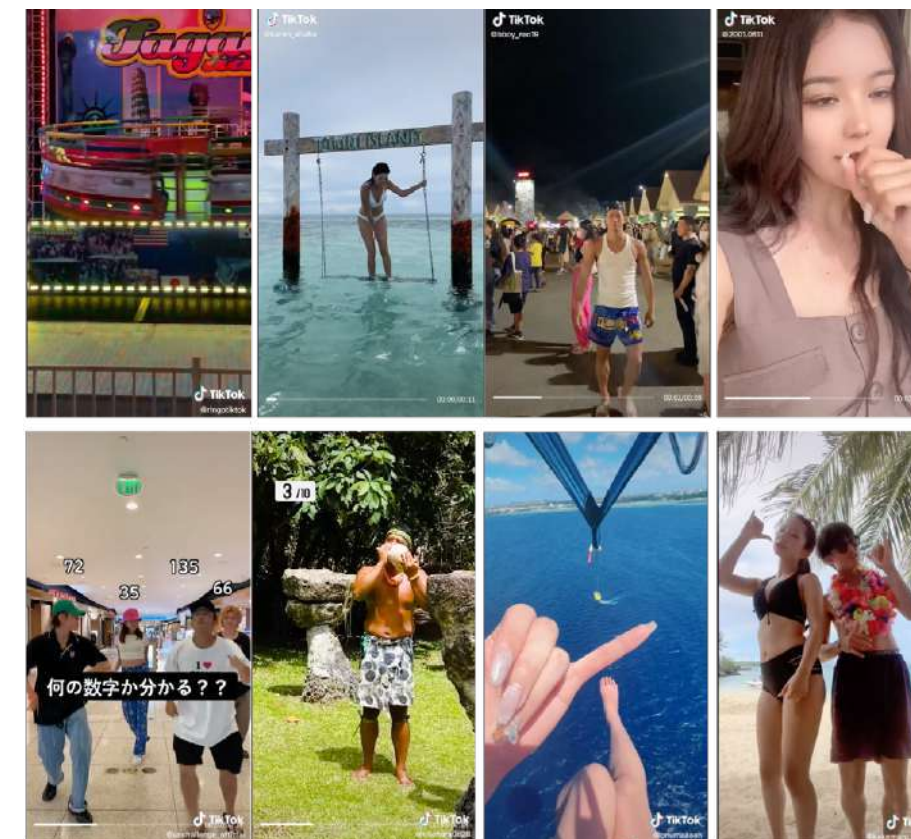
FACEBOOK:
23,735 followers to 24,033

INSTAGRAM:
20,196 followers to 23,513

TIKTOK:
4,500 followers to 26,408

TWITTER:
13,427 followers to 14,591

Japan welcomed 13,022 visitors, about 6% of market share in total arrivals for FY2022, which equated to a total increase of +277% compared to last year.



- Additionally, the #HereWeGuam ambassador was launched selecting five (5) brand ambassadors through an interview process to feature the island's particular categories from Culture, Sports, Beach, Food and Free Styling to create short movies & SNS content.
- Movie content were created and utilized for SNS known as "always on ads" and SNS organic posts which were also shared as joint programs with industry partners, aligned the consistent communication for Guam's brand image.
- Other successful digital co-ops also included HYPEBEAST Japan to promote Gen Z golf to develop a new market.

MARKET: PHILIPPINES



Guam delegation during the 29th PTAA Travel Tour Expo at the SMX Convention Center in Manila on June 24-26, 2022. Pictured (L to R – front row): Mrs. Victoria Paco, wife of Rudy Paco; Honorable Rudy Paco, Mayor of Mongmong-Toto-Maite; Honorable Frankie Salas, Mayor of Asan-Maina; Honorable Peter Benavente, Vice Mayor of Dededo; Sharlene Guerrero, GVB Marketing Manager – Philippines; Mrs. Geraldine Gutierrez, wife of Carl Gutierrez; GVB President Carl Gutierrez; Honorable Anthony Chargualaf, Mayor of Inaláhan; Mrs. Angelica Chargualaf, wife of Anthony Chargualaf; Honorable Dale Alvarez, Mayor of Santa Rita-Sumai; Honorable Johnny Quinata, Mayor of Humátak; Mrs. Evangelina Quinata, wife of Johnny Quinata. (L to R – back row): Vincent San Nicolas, musician; Alan Rosario, musician; Kraig Camacho, GVB Community Development Officer; Erik Salvador, GVB Marketing Coordinator - Philippines.



Key travel partners at the Worldmaster International B2B event in Clark.



Travelers inquiring about Guam at the GVB booth at the International Travel Festival in Cebu on February 18-20, 2022.

Website visits coming from the Philippines soared from 18,696 sessions in FY2021 to 96,856 sessions in FY2022 - a 418% increase.

3 Solidify Guam as a choice travel destination for travelers from the Philippines.

- B2B travel trade initiatives have put Guam as one of the strong contenders for travel destinations offered by our travel partners, having been able to confirm on the spot at least 150 pax guaranteed travelers who will be visiting Guam within the next 2-3 months.

- During the last quarter of the FY, we released a travel packages ad connecting our audiences with our partner travel agents to boost bookings to the island, generating 790 messaging connections on our social media platforms, 77,636 post engagements, and 117,274 ad clicks; travel packages ad that led to a landing page on the Visit Guam website generated 513,358 impressions, 19,018 post engagements, and 10,447 ad clicks as of September 12, 2022.

SMART GOALS

- 1 To raise awareness regarding Guam and its CHamoru culture and what travelers from the Philippines can expect during their visit.
 - Generated close to USD \$60,000 worth of media mileage through PR channels.
 - Social media engagement rates increased by 127% in comparison to previous period.
 - Website visits coming from the Philippines soared from 18,696 sessions in FY2021 to 96,856 sessions in FY2022 - a 418% increase.
 - Digitally released carousel ads highlighting Guam's food, culture, sights, and activities and launched an omnibus video to amplify what can be expected in Guam, garnering a total of 12.1 million impressions on social media, resulting in 693,843 engagements and 691,471 ad clicks.
- 2 Amplify Guam as the next travel destination to consider.
 - On OOH(out of home) initiatives, strategically placed lamp post banners in two key cities, IT Park in Cebu City and the Clark Freeport Zone in Angeles City, Pampanga, generating at least 30,000 foot and vehicle traffic on a daily basis exposing Guam to possible travelers outside of Metro Manila.
 - Philippine Travel Agencies Association (PTAA) Travel Tour Expo B2C event allowed us to reach up to 40,000 visitors, 10% of which interacted with our booth, helping gain 729 new followers on our social media platforms.
 - Invited key city mayors in the Philippines to meet with Guam mayors, sparking renewed interest and forging new sister cities between the two islands. Through this event, six new cities are lined up for sisterhood, solidifying new alliances and increasing targeted reach for new potential travelers to Guam.

AT A GLANCE

- 1 TRADESHOWS/ CONVENTIONS
- 5 SEMINARS/ WORKSHOPS
- 2 COOPERATIVE PROJECTS
- 0 TRAVEL TRADE FAM TOURS
- 1 MEDIA FAM TOURS
- 4 ONLINE PROMOTIONS

FY 2022 **6,230** **175%**
TOTAL ARRIVALS increase from last year
FY21: 2,262

TOTAL MEDIA EXPOSURE	
TRADITIONAL	\$21,304.67
ONLINE	\$29,361.71
COMBINED (print & online)	\$50,666.38

DIGITAL MEDIA EXPOSURE			
	IMPRESSION	CLICKS	CONVERSIONS*
WEB, SOCIAL & PAID	20,380,733	616,538	96,856

MARKET: PHILIPPINES



The Guam delegation met with national and local travel associations and Negros Occidental delegates on June 27, 2022.

HIGHLIGHTS

- Participated in the 28th PTAA TravelTour Expo at the SM Megatrade Hall in Manila on November 5-7, 2021, first physical travel expo since the pandemic; GVB team met travel agent partners who have extensively promoted Guam to their clients.
- Took part in the Worldmaster International Travel Mart at the Richmonde Eastwood Hotel and Royce Hotel in Clark on April 30 and May 2, 2022 respectively, largest B2B event GVB has participated in, with over 200 travel agents attending.
- Joined the International Travel Festival at Ayala Mall's The Atrium in Cebu on February 18-20, 2022, first event attended outside Metro Manila since the pandemic, conducting surveys that showed Cebu market is ready for travel to Guam, with 40% of attendees possessing US visas.
- Participated in the 29th PTAA TravelTour Expo at the SMX Convention Center in Manila on June 24-26, 2022, the biggest consumer travel expo since the pandemic, with 38,871 total visitors attending.



GVB Booth at the 28th PTAA TravelTour Expo in Manila, first event participation since February 2020; pictured (L to R) GVB Philippines Cheska Dizon, Account Director and Philip Gejon, Sales Manager



TARZAN FALLS, YONA

MARKET: SOUTH KOREA



Guam wins Best Organizing Booth Award at Seoul International Travel Fair.

AT A GLANCE

- 5** TRADESHOWS/ CONVENTIONS
- 3** SEMINARS/ WORKSHOPS
- 98** COOPERATIVE PROJECTS
- 5** TRAVEL TRADE FAM TOURS
- 7** MEDIA FAM TOURS
- 0** ONLINE PROMOTIONS

FY 2022 **65,638** TOTAL ARRIVALS *5,894.34% increase from last year*
FY21: 1,095

TOTAL MEDIA EXPOSURE			
COMBINED (print & online)	\$164,884,236		
DIGITAL MEDIA EXPOSURE			
	IMPRESSION	CLICKS	CONVERSIONS*
WEB, SOCIAL & PAID	218,543,983	712,584	4,203,076

SMART GOALS

- 1** Welcome 250,000 Korean visitors in FY2022

 - Welcomed 108,454 visitors, accounting for 50% of all Guam arrivals in FY2022. (An increase of 5,157.1% compared to the previous year).
- 2** Co-op with travel agents & media

 - Supported Guam sales promotions and contests, TV home shopping, social commerce, and website promotions.
 - Promoted airlines, hotels, activities, transportation, and more through OTA channels.
 - Promoted the #GuamAgain campaign through powerful media platforms and effectively targeted specific markets by distributing advertisements and advertorials.
 - Accumulated media exposure valued at \$164,884,236.00 in FY2022.
- 3** Grow presence on Korean SNS and enhance digital campaigns & events.

 - Posted over 50 contents on SNS channels per month.
 - Conducted at least one social media event every month to increase followers and engagement and raise awareness of the “Guam Again” campaign.
 - Grew GVB Korea online followers to the following numbers:

FACEBOOK: 34,959
INSTAGRAM: 28,530
NAVER BLOG: 10,855
KAKAO PLUS: 52,521



Digital influencer content production.

Guam Again



Filming special Guam episodes of the mukbang TV show “Tasty Guys.”

- 4** Develop educational tourism and sports tourism

 - Participated in the International Education and Career Fair in Seoul in partnership with GVB members.
 - Worked with pro golfers and social media influencers to create golf-related marketing assets to increase awareness of Guam’s golf courses.
- 5** Promote CHamoru culture, history, local food, and made-in-Guam products.

 - Launched “Guam F & B Week” to highlight local restaurants and foods, such as red rice, kelaguen, and CHamoru banana donuts.
- 6** Elevate Guam’s consumer appeal by partnering with influential brands

 - Collaborated with global consumer brands like BMW to maximize Guam exposure.
 - Engaged with the public by conducting online and offline consumer events.
 - Increased Guam exposure by regularly providing up-to-date information on Visa Korea’s SNS channels and engaging consumers with attractive advertisements through digital marketing promotions.

HIGHLIGHTS

#GuamAgain FAM Tour

Participants inspected 10 local hotels and took part in a travel trade show, where almost 30 local partners provided useful information to Korean agents. Participants were able to network and learn about Guam’s diverse products and experiences.

MARKET: SOUTH KOREA



50 Korean travel trade partners in attendance for the #GuamAgain FAM Tour.

The 37th Seoul International Travel Fair

GVB participated in the Seoul International Travel Fair (SITF) from June 23 - 26, 2022. SITF is the largest comprehensive tourism expo in Korea with a plethora of countries participating to promote tourism, travel, and culture. GVB's local industry partners showcased their unique offerings and properties during the event. Guam's history and culture was also highlighted through cultural performances on the main stage of SITF and the Guam booth site. GVB won 'The Best Organizing Booth Award' at the event.

Tasty Guys TV Filming

GVB welcomed the hosts and crew from the ever popular 'Mukbang', also known as an 'eating show' called Tasty Guys. The special 400th anniversary episodes featured famous Korean comedians promoting Guam as a gourmet-food destination by exposing the island's best restaurants and unique cuisine. The project also highlighted Guam's tourist attractions and instagrammable spots to further position Guam as a dynamic destination for Korean visitors.

Guam Color Wave

Under the aim of encouraging the growth of eco-tourism spots in Guam, GVB accomplished the 'Guam Color Wave' project in partnership with famous Korean artists and the Inalåhan Mayor's office. The vivid murals depict images of island life, showcasing Guam's local flora and fauna while also giving a glimpse of Inalåhan's legendary Chamorro chief, Gadao.



Korean artists paint new mural in village of Inalåhan for the "Guam Color Wave".

Awards Earned In-Market:

The Best Organizing Booth Award at the 37th Seoul International Travel Fair.

Although FY2022 remained a challenging year for travel worldwide, Guam's tourism industry finally began to experience the beginning of real and lasting recovery, especially in the Korean market. Guam received service from six airlines throughout most of FY2022 — Korean Air, Jin Air, Air Busan, Air Seoul, Jeju Air, and T'way — providing a total of 197,985 seats (970% more seats than 2021.) And by the end of the year, Guam had welcomed 108,454 Korean visitors, comprising half of all arrivals in FY2022.

Despite COVID-related travel restrictions and issues, GVB continued to aggressively promote Guam as a safe and ideal destination through the #GuamAgain campaign.

Photo by YuJu Lin



 PAGAT CAVE, YIGO

MARKET: TAIWAN



Taiwan President Tsai-Ying Wen visited the Guam booth in June 2022 and learned more about Guam's favorite snacks.



Super Taste, a popular television show in Taiwan, filmed four episodes on Guam. The four hosts and crew were on Guam from August 30-September 13, 2022.

Guam participated in a virtual sister city agreement with Taichung City on February 23, 2022.



AT A GLANCE

- 9** TRADESHOWS/ CONVENTIONS
- 26** SEMINARS/ WORKSHOPS
- 1** COOPERATIVE PROJECTS
- 0** TRAVEL TRADE FAM TOURS
- 2** MEDIA FAM TOURS
- 143** ONLINE PROMOTIONS

FY 2022 **636** TOTAL ARRIVALS 71.95% decrease from last year
FY21: 2,267

TOTAL MEDIA EXPOSURE	
TRADITIONAL	\$306,896
ONLINE	\$13,365,838
COMBINED (print & online)	\$13,405,734

DIGITAL MEDIA EXPOSURE		
	IMPRESSION	CLICKS
WEB	N/A	N/A
SOCIAL	4,856,956	52,698
PAID	85,574	N/A

SMART GOALS & ACCOMPLISHMENTS

- 1** Increase Guam's share of voice on news by 20%
 - Sent photographers and key opinion leaders (KOLs) to Guam to take beautiful photos as promotional materials.
 - GVB Taiwan Facebook fan page has 82,002 followers as of 9/30, which is 6.11% increase compared to Oct. 2021 - Sept. 2022.
 - GVB Taiwan Instagram has 5,330 followers as of 9/30, which is 40.26% increase compared to Oct. 2021 - Sept. 2022.
 - The accumulative value of media exposure for FY2022 is US\$13,405,734 as of 9/30.
 - Held a CNY Media Gathering to strengthen the relationships with media and create media exposure.
- 2** Develop FIT Market
 - Participated in many travel fairs and travel association events to promote destination Guam.
 - Attended events organized by universities and educational associations to develop more potential students and travelers to Guam.
 - Held a Guam Taiwan Office One-Year Anniversary to promote Guam's unique natural beauty, culture, and its contribution to the Guam-Taiwan relations.
 - Participated in the 2022 Food Taipei to utilize Guam's unique snacks to attract people import and to visit Guam.

- 3** Work closely with TECO on Guam to promote destination Guam and maintain cultural relations.
 - Held an Online MICE Sales Mission with Travel Agencies to attract around 300 travel agents to learn Guam's MICE environment.
 - Attended ASOA Investment and Trade Seminar, ASOA Bio Forum, 2021 & 2022 US Business Day to promote Guam's MICE tourism and attract Foreign Domestic Investment to Guam.
 - Connected with TECO on Guam to develop more tourism, investment, cultural, and educational interactions between Guam and Taiwan by holding conference calls with relevant parties all together.
 - 2022 TECO - GVB Earth Day Beach Clean Up

HIGHLIGHTS

Travel Trade Exhibitions

GVB exhibited in several trade shows including Taipei International Travel Fair (TITF), Taipei International Travel Fair (ITF), Taipei Travel Expo (TTE) and Kaohsiung International Travel Fair (KITF). GVB secured free booths for every travel fair.

Guam-Taichung Sister City Agreement

Guam and Taichung city signed a sister city agreement on February 23rd. This milestone not only elevated Guam's relationship with Taiwan, but it also raised more awareness of destination Guam. The media was very active in reporting the ceremony and called the move a step forward in relations with the U.S. A total of 59 media pieces were

created, including 7 reports on TV, 51 online news, and 1 post on social media.

ASOA Food Taipei

GVB exhibited at the ASOA Food Taipei Show that highly impressed participants including Taiwan President Tsai-Ying Wen, who visited Guam's booth and learned about Guam's favorites snacks, chocolates, and craft beer. GVB attracted over 200 actual visits and exchanged business cards from partners and industry attendees. This highly anticipated event not only to introduced and promoted Guam's food products to potential buyers and dealers but it also promoted Guam's culture and tourism spots.

MARKET: TAIWAN



Guam's lantern display at the Taipei Lantern Festival on February 11-20, 2022.

Taipei Lantern Festival

GVB participated in one of Taipei's biggest events, the Taipei Lantern Festival. GVB gained over 700 new followers on our official Facebook page from this event. To maximize exposure of the Guam Lantern, GVB cooperated with one of Taiwan's biggest amusement park, Leofoo Village, to continue the display of the Guam Lantern and attract the family market.

KOL Fam Fam Tour

GVB invited a travel & lifestyle KOL to Guam to experience Guam's beauty, nature, and culture. The KOL shared her experience on her social media platforms to promote destination Guam. GVB arranged for a photographer to Guam capture Guam's beauty through the lens and to update our image library.

Super Taste TV Show Visits Guam

A popular and well-known food and travel leisure TV show, Super Taste, filmed their 4 episodes on Guam to introduce the destination to Taiwanese. The reach of each episode exceeded one million, of which more than 100K+ viewers are aged 25-39.

Air Service

GVB frequently visited the American Institute in Taiwan (AIT), AmCham, ASOA, EVA Air, China Airlines, Starlux Airlines, Ministry of Foreign Affairs (MoFA), Civil Aeronautics Administration (CAA), Lion Travel, Phoenix Travel and other trade partners, to explore cooperative opportunities and the resumption of direct air service to Guam.



GVB invited popular Taiwanese influencer, Zhiting, to Guam on August 4-9, 2022.

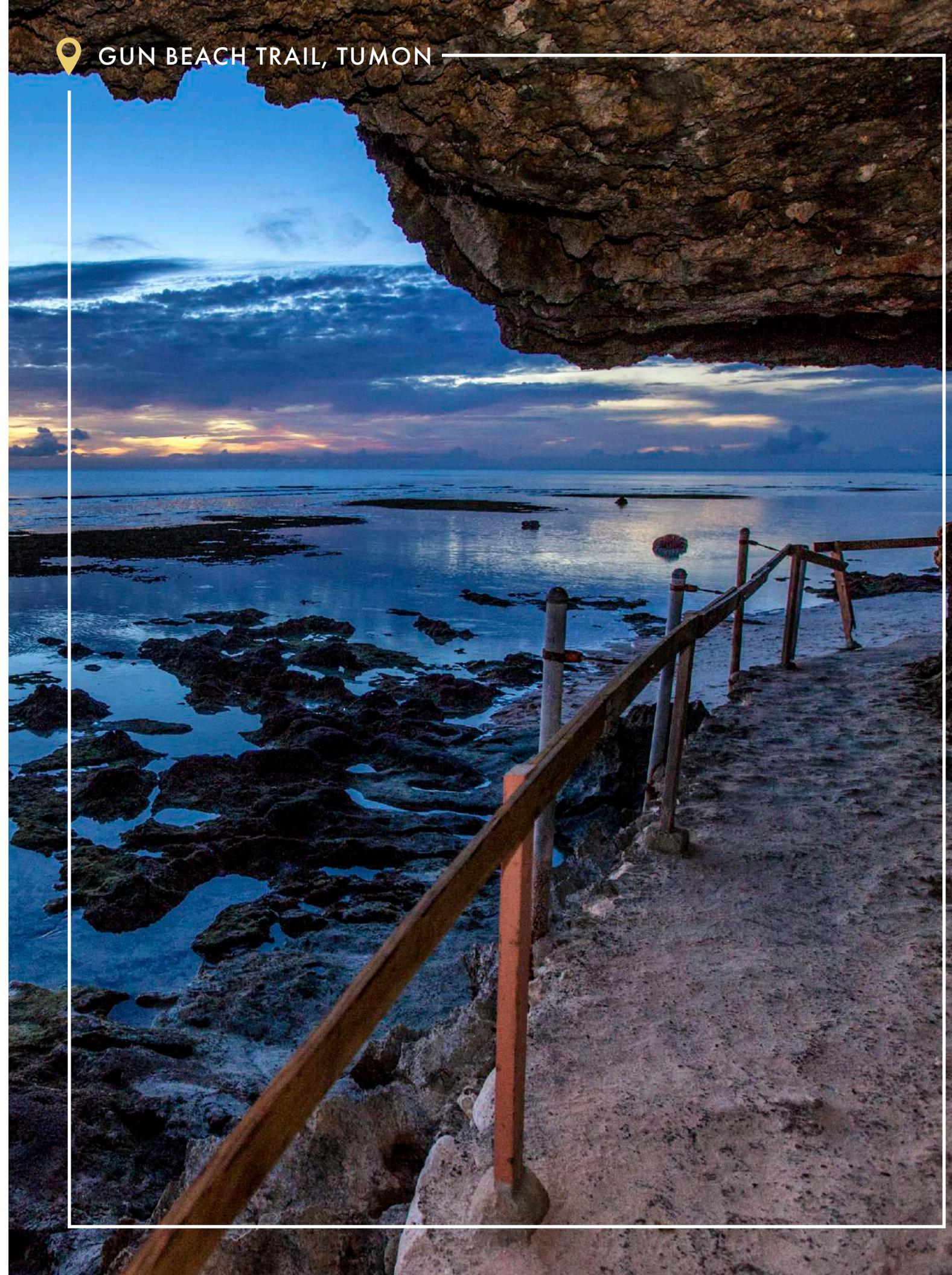
Awards Earned In-Market: Taipei Lantern Festival, February 11-20, 2022

GVB's lantern received compliments and an award from the Taipei City Government.



Felix receiving award from Taipei City Mayor, Ko Wen-je

GUN BEACH TRAIL, TUMON



MARKET: PACIFIC



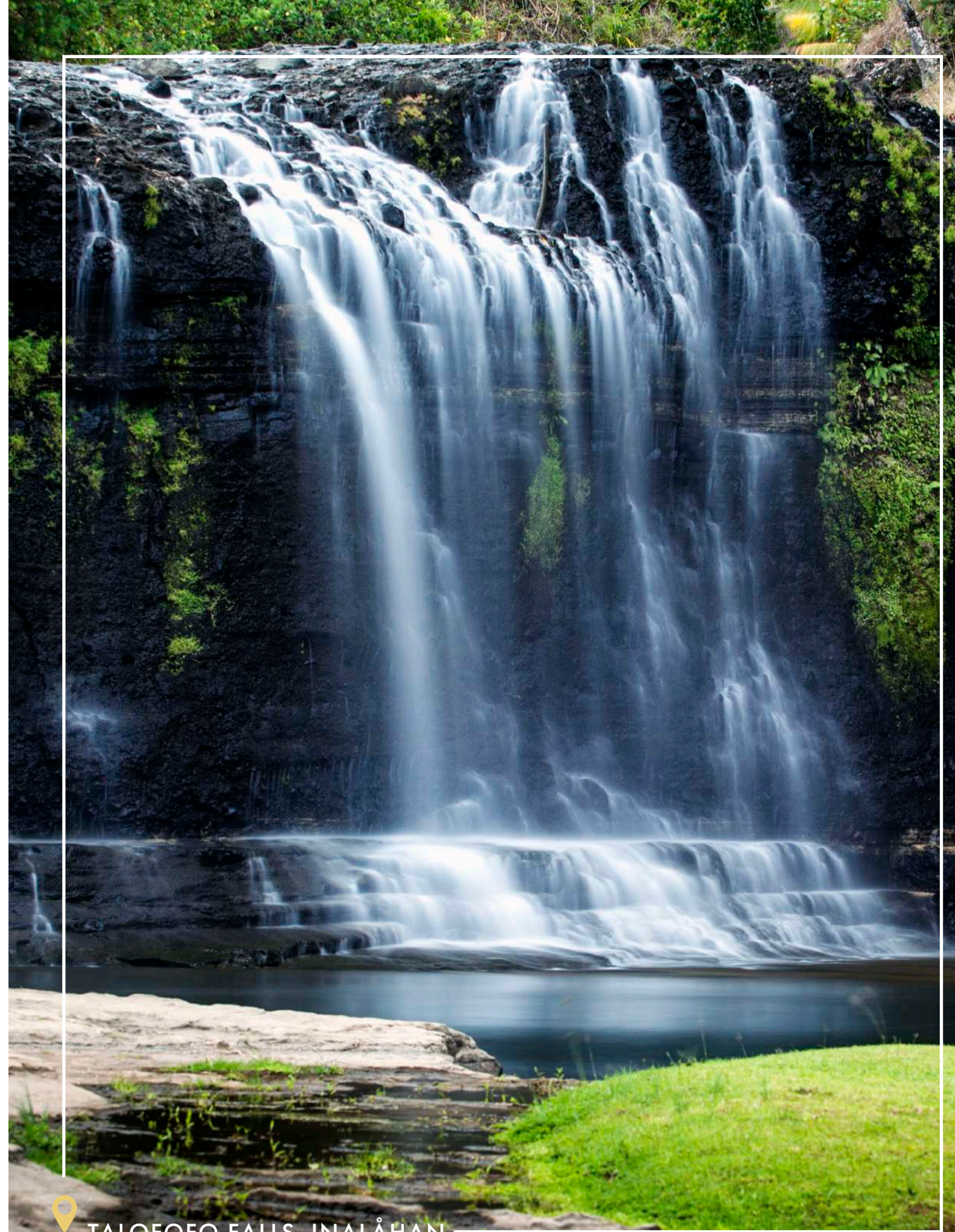
SMART GOALS & ACCOMPLISHMENTS

- 1** Increase visitor arrivals to 45,000 pax.
 - GVB fell short in increasing visitor arrivals to hit its target, however, arrivals did quadruple compared to FY 2021, or by close to 200%. The visitor arrival forecasts for the Pacific market remains positive.
- 2** Market and expand Guam as a world-class destination through participation in at least four (4) key international trade/consumer shows.
 - Due to a limited budget, GVB was unable to continue its participation in overseas travel trade and consumer events in the Asia Pacific region. Instead, GVB has taken opportunities to participate in virtual panels and conferences to represent Guam and the region in international seminars and conferences.
- 3** Continue to be involved in PATA International and PATA Micronesia through participation in the PATA Executive Board Meetings, PATA Annual Summit, PATA Travel Mart and the PATA Micronesia Chapter Meetings.
 - Despite a limited budget, GVB continues to be involved with PATA and PATA Micronesia. GVB President & CEO, Carl T.C. Gutierrez was nominated and successfully won a seat on the prestigious PATA International Executive Board, representing the region in the largest travel trade association in the Asia Pacific region.
- 4** Increase activity in online and social media platforms with the MicronesiaTour website and maintain search optimization ranking among the top 3 search results on Google.com
 - GVB, through the PATA Micronesia Chapter, continues to promote travel to Micronesia on its website and social media platforms. MicronesiaTour.com still remains high in the search ranking for travel related searches for the region.

AT A GLANCE

- 1** TRADESHOWS/ CONVENTIONS
- 3** SEMINARS/ WORKSHOPS
- 2** COOPERATIVE PROJECTS
- 0** TRAVEL TRADE FAM TOURS
- 2** MEDIA FAM TOURS
- 0** ONLINE PROMOTIONS

FY 2022 **18,994** **197%**
TOTAL ARRIVALS increase from last year
FY21: 6,387



TALOFOFO FALLS, INALÅHAN

MARKET: NORTH AMERICA



Photo by Sofia Oropesa

ATA A GLANCE

- 8** TRADESHOWS/ CONVENTIONS
- 1** SEMINARS/ WORKSHOPS
- 2** COOPERATIVE PROJECTS
- 0** TRAVEL TRADE FAM TOURS
- 2** MEDIA FAM TOURS
- 0** ONLINE PROMOTIONS

FY 2022 **64,572** **57%** increase from last year **FY21: 41,239**
TOTAL ARRIVALS

SMART GOALS & ACCOMPLISHMENTS

- 1** Increase visitor arrivals to 70,500 pax or 75% of FY 2019 pre-pandemic arrivals.
 - GVB fell short in increasing visitor arrivals to hit its target, however, arrivals increase by 57% compared to the previous year, providing a positive outlook for future arrivals.
- 2** Develop a solid working relationship with at least 5 new USA travel wholesalers, dive wholesalers, and MICE buyers to actively sell Guam.
 - Goal was not reached as limited budget and lack of participation in international trade and consumer event made it difficult to maintain these relationships.
- 3** Work with worldwide US military organizations to promote Guam.
 - GVB has successfully worked with both the Naval Base Guam and Andersen Air Force Base by attending their trade fairs and assisting with orientating military members who just arrived on the island. GVB has also worked with online publications military.com and Stars & Stripes to further promote travel to Guam within the military community abroad.

NEW MARKETS DEVELOPMENT



Photo by Miyu Schwab

ATA A GLANCE

- 0** TRADESHOWS/ CONVENTIONS
- 0** SEMINARS/ WORKSHOPS
- 2** COOPERATIVE PROJECTS
- 0** TRAVEL TRADE FAM TOURS
- 0** MEDIA FAM TOURS
- 0** ONLINE PROMOTIONS

FY 2022 **708** **-34%** decrease from last year **FY21: 1,044**
TOTAL ARRIVALS

SMART GOALS & ACCOMPLISHMENTS

- 1** Increase visitor arrivals from new market sources.
 - Arrivals from Singapore and India did not exceed arrivals in FY 2021. FY 2022 arrivals from Singapore and India were down 38% and 48%, respectively. Malaysia saw a 257% increase in arrivals, from 19 to 68 pax.
- 2** Increase awareness of Guam in new markets.
 - GVB continues to share the latest travel news and information with trade and media partners in new markets. GVB participated in the ITB Asia, MICE Show Asia and Travel Tech Asia in Singapore and met with buyers from new markets and promoted travel to Guam. GVB also collaborated with Philippine Airlines in Singapore to host a Guam Product Update with key travel agents.
- 3** Work closely with key travel agents in Malaysia and Singapore to promote visa-free and U.S. travel to Guam.
 - GVB supported Apple Vacations in Malaysia as a sponsor to their participation in MATTA Fair and the Apple Travel Fiesta. In return, Apple Vacations helped promote travel to Guam by creating and offering Guam packages to potential travelers.
- 4** Participate in international travel trade and consumer shows in Malaysia, Singapore and other new market potential.
 - Due to a limited budget in FY 2022, GVB was not able to participate in any overseas travel trade and consumer events. However, in the beginning of FY2023, GVB participated in the ITB Asia, MICE Show Asia and Travel Tech Asia in Singapore and also conducted a Guam Product Update with Philippine Airlines and key travel agents from Singapore.

FY2022: DIGITAL REVIEW



Photo by Madalynn Trasky



Photo by Kathya Legaspi

Technology has always played a major role in the bureau, especially now in the way we reposition Guam as a safe destination of choice and fiercely compete in the ever-changing global tourism market.



Photos by Elaine Cochon (above) & Noemi Kuroiwa

The coronavirus pandemic has demonstrated that technology has reshaped the way the world conducts business, no matter the industry. Technology has always played a major role in the bureau, especially now in the way we reposition Guam as a safe destination of choice and fiercely compete in the ever-changing global tourism market. Face-to-face meetings (having taken a back seat to various video-conferencing methods for the last several years) are making a comeback. Working from home, which quickly turned mainstream in all sectors of the economy, has started to see a decline in early 2022. It looks like digital communication is here to stay as businesses and organizations still use Zoom, Meet, GoTo Meeting, Teams, LogMeIn and/or RemotePC on a regular basis. Furthermore, these services are now a part of their business continuity and disaster recovery plans.

GVB has already set the stage for a new generation of communications beginning with the major rebuild of its network infrastructure in late 2020. Adopting Unified Communications to serve as the foundation for the bureau's telecom strategy has been the primary technological advancement objective for 2022. After delays due to budget restraints and other pandemic-induced challenges, it continues as planned by 1) migrating desktop telephone instruments to VOIP (Voice Over IP), 2) exercising a merged digital communication facility that is inherently becoming more and more built in to everyday hardware and software, 3) embracing the utilization of cloud computing services, and finally, 4) ensuring that secure, robust, dedicated and highly dependable internet connectivity (redundant) is provisioned to support it all.

Digital tools including Google's Workspace, Microsoft's 365, Adobe's Creative Cloud, video-conferencing platforms, and multiple, stable internet connections remain critical in the everyday functions in order to carry out the overall mission of the bureau. Various hardware and software solutions continue to be renewed or upgraded, ensuring business continuity and maintaining a necessary competitive edge in the world tourism market. We will also continue to leverage various contracted services such as network security and support which provides connectivity redundancy, official backups of essential accounting, research, and marketing data (on and off-site), protection from outside digital threats (that is becoming increasingly more wide-spread), and proper tools and best-practices to help navigate and effectively plan for what technology may offer in the future.

FY2022 (and into FY2023) Global Website initiatives include:

Full optimization and maximization of the bureau's

- 1 CMS (Content Management System) with various digital marketing services including Content Creation Engagement and Conversion Rate Optimization Engagement,
- 2 CRM (Customer Relationship Manager) using additional modules, i.e., EVENTS/RSVP and MEETINGS,
- 3 UGC (User-Generated Content) manager 'CrowdRiff' and
- 4 Membership Extranet

We will strive towards more integration of all digital tools in an effort to maximize interoperability, digital efficiency, security and strict compliance. SEO (Search Engine Optimization), CRO (Conversion Rate Optimization), Content Development and Custom Analytics & Tracking are just some of the initiatives the bureau will continue strong into the coming fiscal year.



Photo by Edna Nego

FY2022: DIGITAL REVIEW

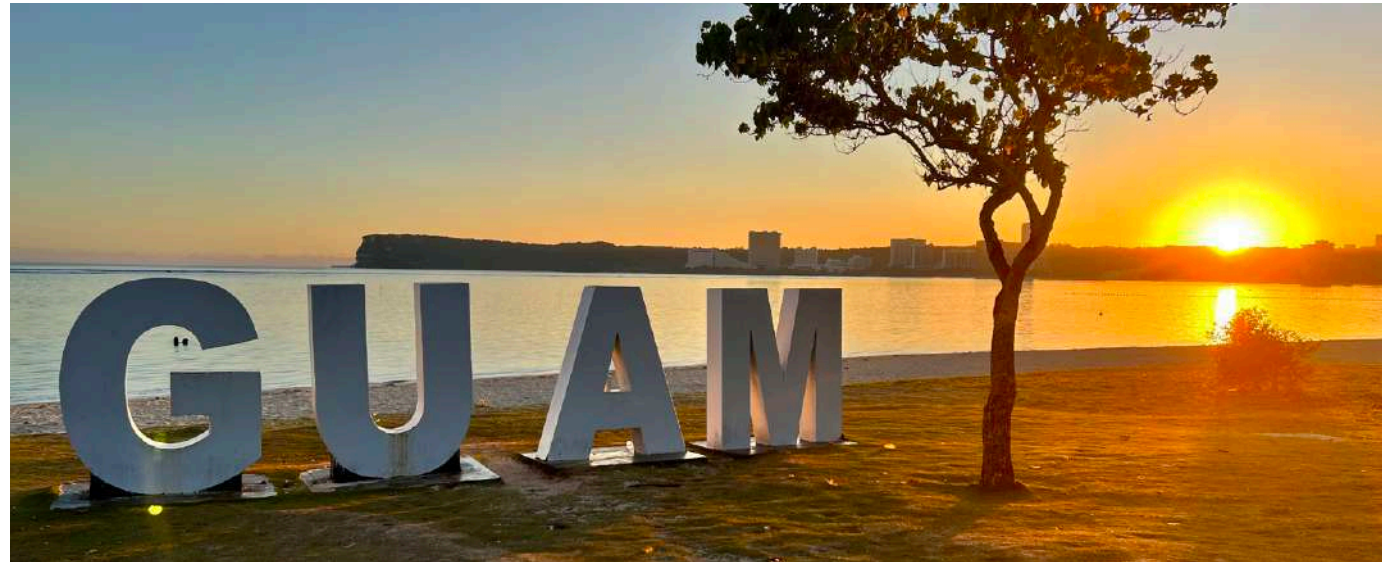


Photo by Annabelle Salazar

While various CRM (Customer Relationship Management) and Extranet training is on-going for GVB's marketing representatives and members/partners, specific digital tools and strategies will continue to be introduced to GVB's marketing officers and overseas representatives. We will also begin delivering additional training and support for GVB's CMS (Websites Content Management System) to local and global web content managers.

OUTCOME

The bureau continues to pursue fully secure, responsive online assets and digital tools, and strives to keep Guam top-of-mind in source markets, seamlessly accommodating the mobile device user. With a mobile-first philosophy, the bureau has already been taking full advantage of how travelers in a post-pandemic era, research destinations, make decisions, and ultimately book their trips. Continued partnerships with Google, Trip Advisor and major Asian SNS platforms continue to solidify our efforts in digitally promoting our beautiful destination at a more competitive level.

MAJOR ONGOING OBJECTIVES

- Implementation of more components integral in accomplishing the Unified Communications initiative
- Implement additional utilities into Global Websites, i.e., Digital Maps, GEO-location related tools, On-Line Booking module, other travelers' tools
- Execution of additional digital services to further support the Global Websites initiative: Content Creation Engagement and Conversion Rate Optimization
- Full implementation and utilization of supplemental CRM modules, EVENTS/RSVP, RFP, SALES, MEETINGS
- Continue improvements for newly redesigned GVB Corporate website GUAMVISITORSBUREAU.COM. Objectives include additional site security and data compliance, encourage more viewership by maintaining responsive design and continue to efficiently provide numerous tools for the membership and community-at-large
- Continue training and support of the GVB Membership Extranet
- Pursue strict compliance to existing and future global website/digital mandates, i.e. CASL (Canadian Anti-Spam Law), GDPR (General Data Protection Regulation), the CCPA (California Consumer Privacy Act, recently was in the Regulatory process - has taken effect January 1, 2020), the most recent Brazilian LGPD (Lei Geral de Proteção de Dados, a new data privacy law that will apply to businesses (both inside and outside Brazil) that process the personal data of users located in Brazil) and other similar national/foreign-global initiatives not realized;
- Ensure high security for all digital implementations (cyber-security and best-practices), including regular penetration tests.



 PASEO DE SUSANA, HAGÁTÑA

📍 ANAO TRAIL, YIGO



As Guam’s tourism industry continues to change, research has become a more essential component in the decision-making process for our island leaders. The rise of the secondary Korean market coupled with the genesis of low-cost carriers (LCCs) has diversified our visitor profiles considerably. It is the responsibility of the GVB Research Department to work with other entities to collect, analyze, and evaluate pertinent data on the visitor industry in order to provide and disseminate comprehensive statistics for the benefit of our island.

In the more than thirty years since its creation, the GVB Research Department has consistently implemented the core objectives outlined in its enabling legislation by producing over 300 statistical reports, conducting and issuing information for more than 456 exit surveys analyzing responses of visitors from our major markets, producing reports on the visitor industry labor market, and analyzing data obtained from the arrival forms filled out by visitors.

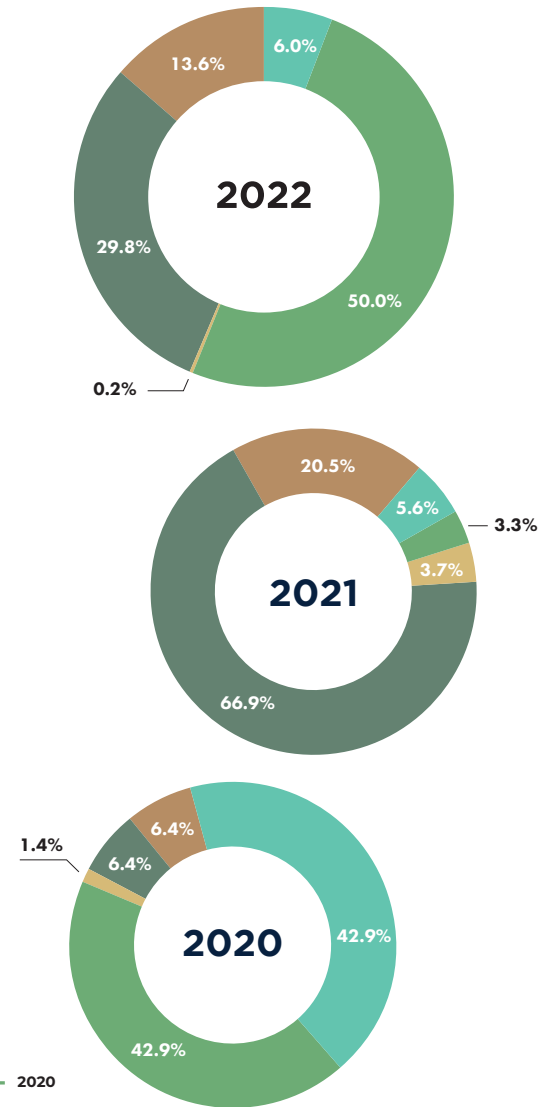
RESEARCH & STATISTICS

FISCAL YEAR ARRIVALS BY ORIGIN

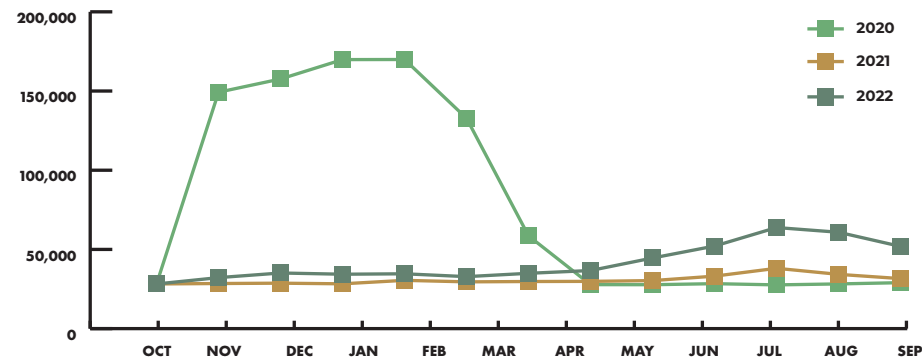
AIR ARRIVALS	2021	2022	% CHANGE LY	VISITOR MIX
Japan	3,454	13,022	277.0%	6.0%
Korea	2,063	108,454	5,157.1%	50.0%
Taiwan	2,253	423	-81.2%	0.2%
China P.R.C.	124	416	235.5%	0.2%
U.S. Mainland	41,239	64,572	56.6%	29.8%
CNMI	3,178	12,625	297.3%	5.8%
Palau	314	1,779	466.6%	0.8%
FSM	2,486	3,345	34.6%	1.5%
RMI	49	166	238.8%	0.1%
Philippines	2,262	6,230	175.4%	2.9%
Australia	360	1,079	199.7%	0.5%
Europe	697	826	18.5%	0.4%
Hong Kong	31	125	303.2%	0.1%
Russia	67	63	-6.0%	0.0%
Singapore	914	562	-38.5%	0.3%
India	153	78	-49.0%	0.0%
Malaysia	25	68	172.0%	0.0%
Other/Unknown	1,014	2,095	106.6%	1.0%
Air Arrivals	60,683	215,928	255.8%	99.5%
Sea Arrivals	924	987	6.8%	0.5%
TOTAL ARRIVALS	61,607	216,915	252.1%	100.0%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau

VISITOR MIX



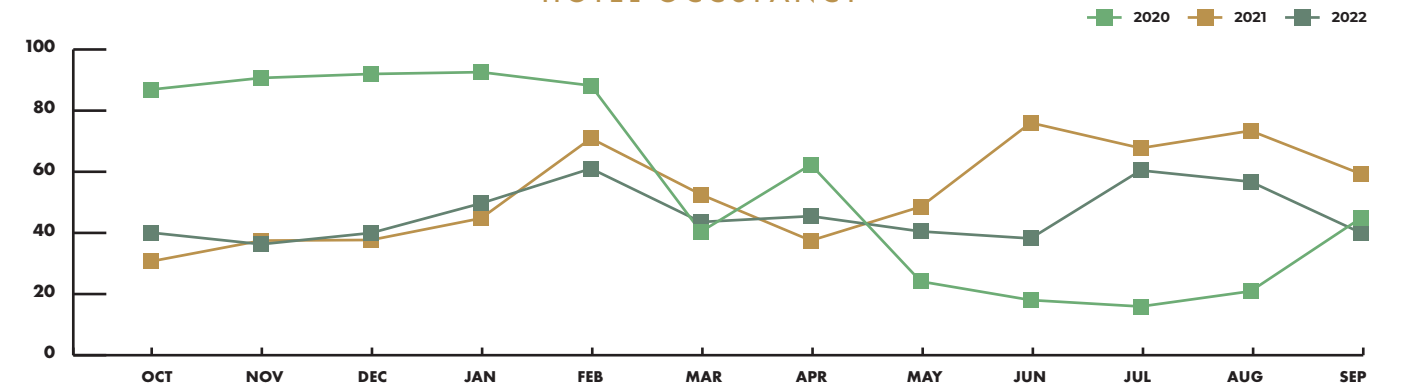
SEASONALITY



	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
2022	6,416	9,615	8,764	9,060	7,096	9,401	11,323	20,008	28,278	41,091	37,835	28,028	216,915
2021	2,331	2,562	2,120	4,526	3,478	3,716	3,814	4,352	7,438	12,860	8,675	5,735	61,607
2020	134,830	143,987	157,408	157,479	116,746	35,310	1,557	1,502	2,221	1,385	2,048	2,912	757,385
% CHG	175.2%	275.3%	313.4%	100.2%	104.0%	153.0%	196.9%	359.7%	280.2%	219.5%	336.1%	388.7%	252.1%

HOTEL STATS

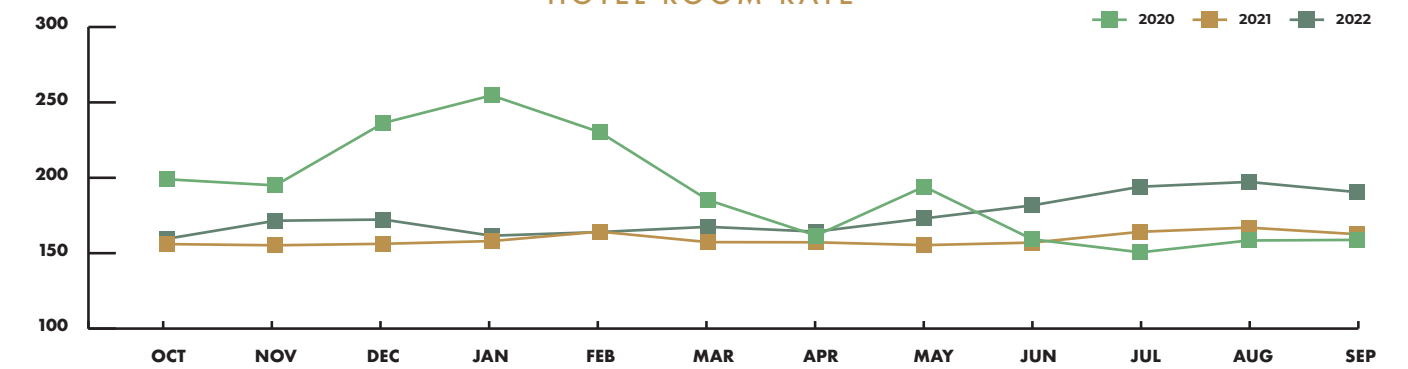
HOTEL OCCUPANCY



	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
2022	30.6%	37.4%	37.6%	44.7%	70.9%	52.5%	37.4%	48.5%	76.0%	67.7%	73.4%	59.3%
2021	40.0%	36.2%	39.9%	49.6%	61.0%	43.5%	45.4%	40.4%	38.1%	60.4%	56.7%	40.0%
2020	86.9%	90.7%	92.0%	92.6%	88.2%	40.3%	62.3%	24.0%	17.9%	15.8%	20.8%	44.7%

Source: STR Global Historical Report

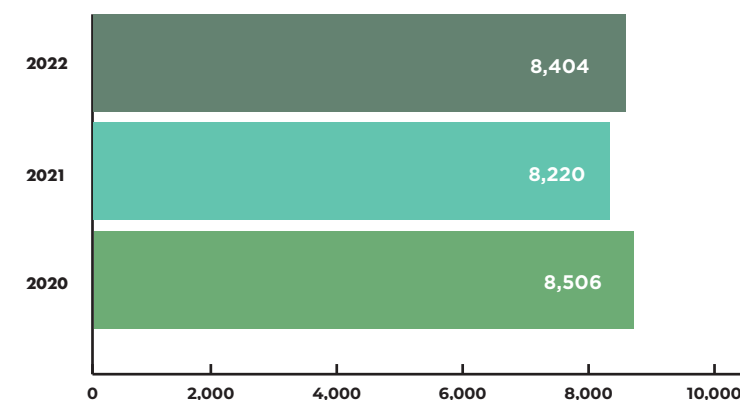
HOTEL ROOM RATE



	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
2022	\$157.9	\$169.9	\$170.7	\$159.9	\$162.3	\$165.8	\$162.6	\$171.4	\$180.1	\$192.5	\$195.7	\$188.9
2021	\$154.3	\$153.5	\$154.5	\$156.3	\$162.6	\$155.6	\$155.5	\$153.6	\$155.3	\$162.5	\$165.3	\$160.9
2020	\$197.5	\$193.4	\$235.4	\$253.4	\$228.9	\$183.7	\$160.0	\$192.6	\$157.4	\$148.8	\$156.7	\$157.1

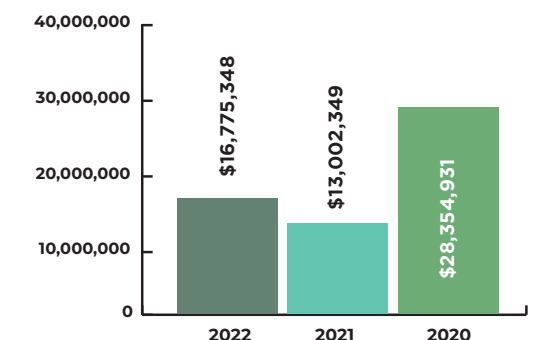
Source: STR Global Historical Report

HOTEL ROOM INVENTORY

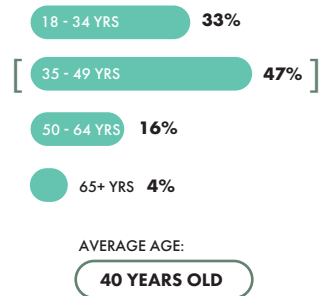
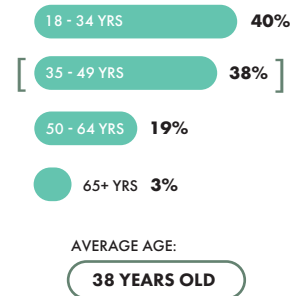
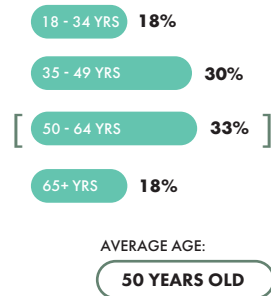
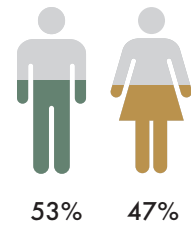
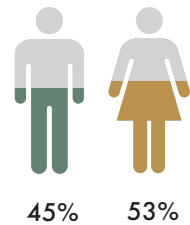
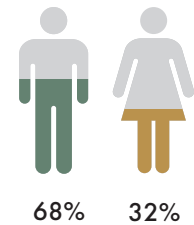


Source: Guam Department of Administration

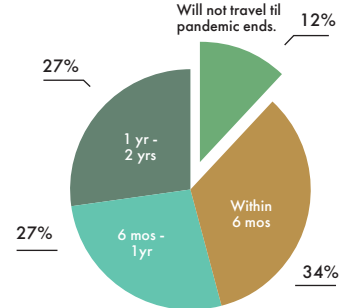
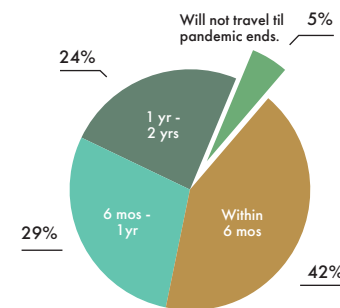
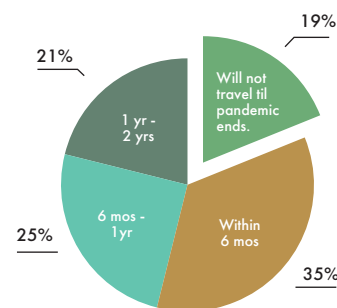
HOTEL OCCUPANCY COLLECTION



MARKET INSIGHTS PROFILE



When, if at all, do you intend to take an international trip for vacation purposes outside of your country to Guam?



When considering a destination to visit, how important are each of the following in your decision of where to go?



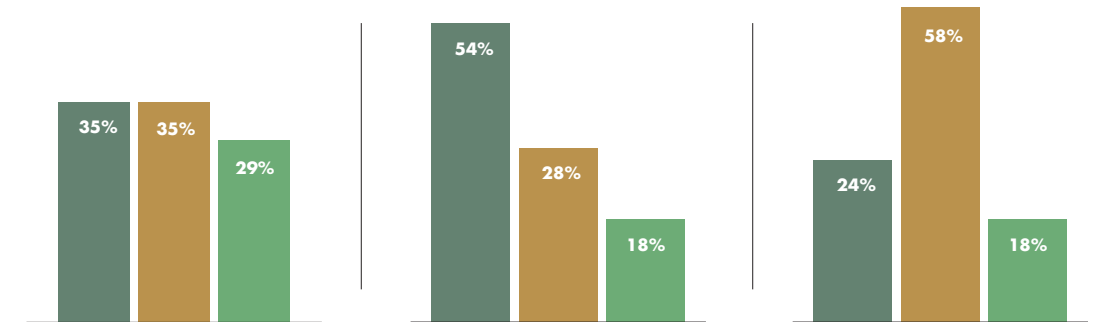
Source: May 2022 Market Insights Profile

MARKET INSIGHTS PROFILE

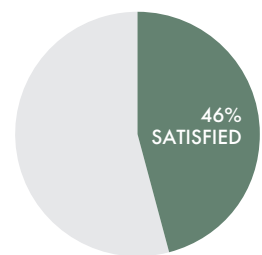
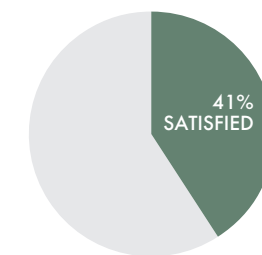
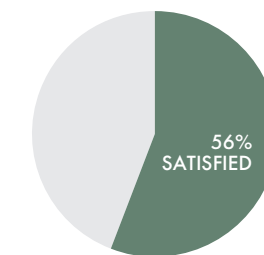


Thinking of your travel plans post COVID-19, are you likely to travel more often, likely travel less often or is there no change in your planned frequency of travel compared to before the pandemic?

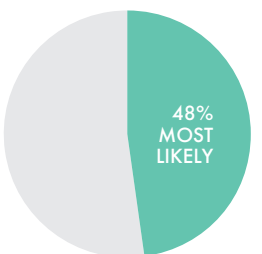
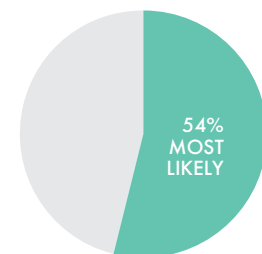
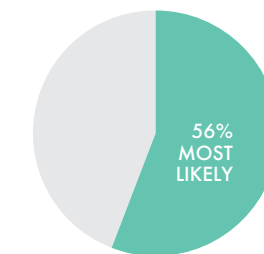
TRAVEL OFTEN
TRAVEL LESS
NO CHANGE



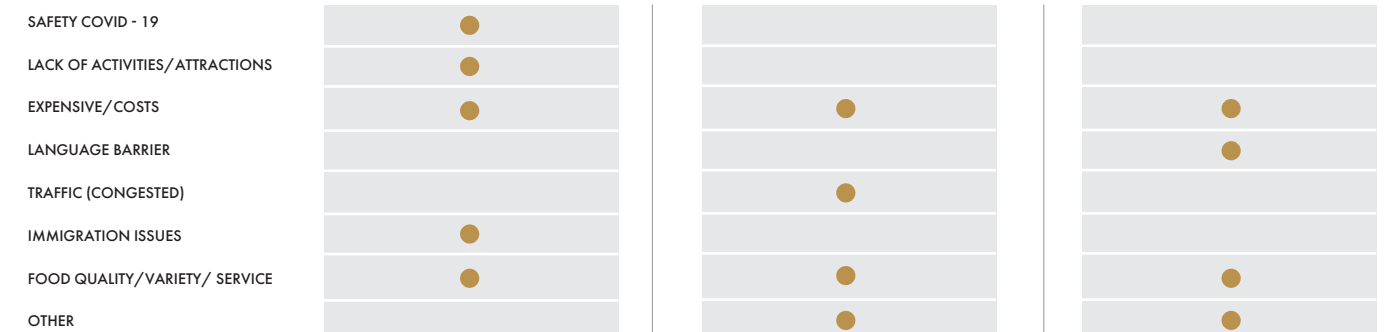
How satisfied were you with your experience while on the island?



How likely are you to consider Guam for the next vacation?

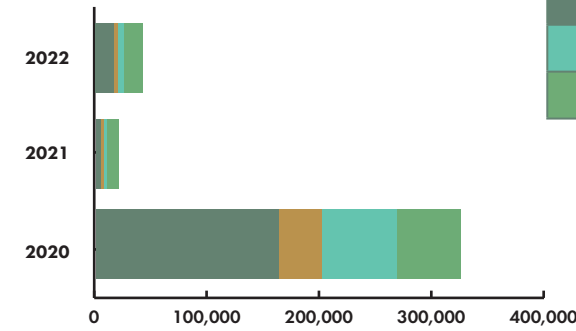


Why do you say you are unlikely to consider Guam for your next vacation?

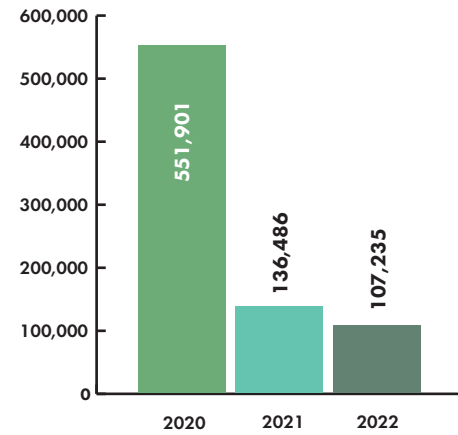


JAPAN ARRIVALS BY REGION

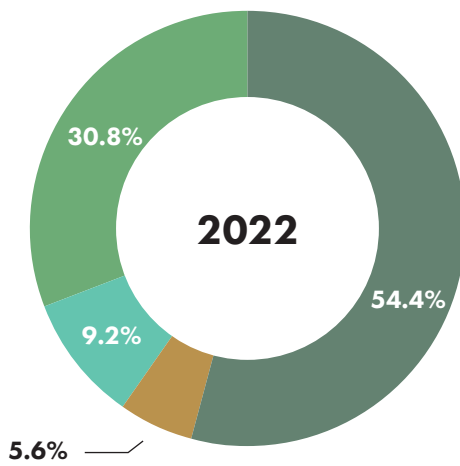
	KANTO (TOKYO)	CHUBU (NAGOYA)	KINKI (OSAKA)	OTHER	TOTAL
2022	7,086	726	1,200	4,010	13,022
2021	1,210	67	70	2,107	3,454
2020	162,737	38,560	66,983	56,294	324,574



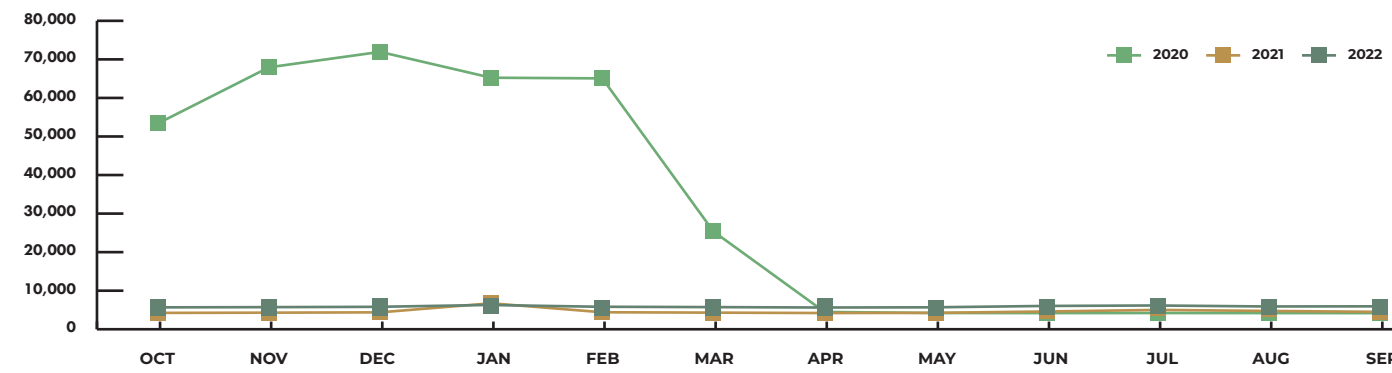
SEAT CAPACITY



Source: Diio Mi: Market Intelligence for the Aviation Industry



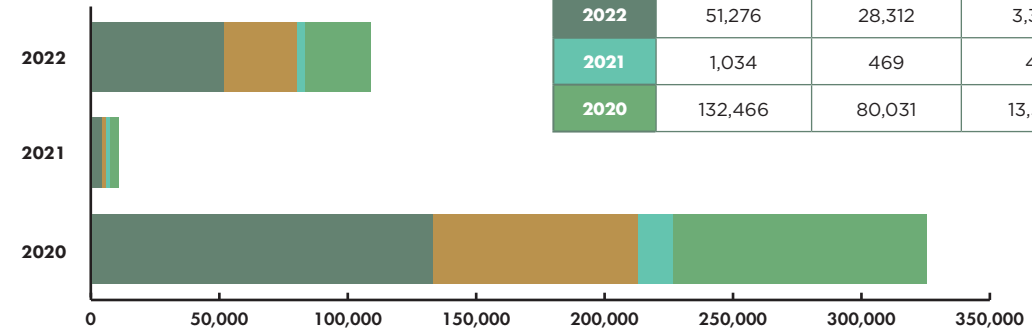
SEASONALITY



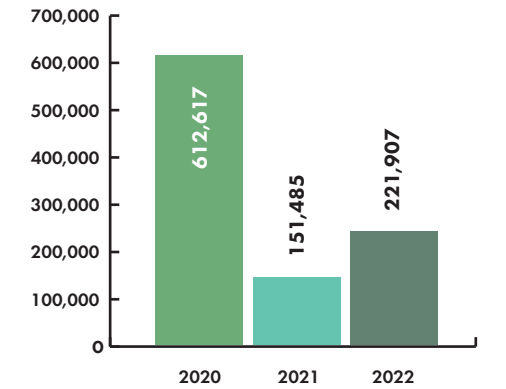
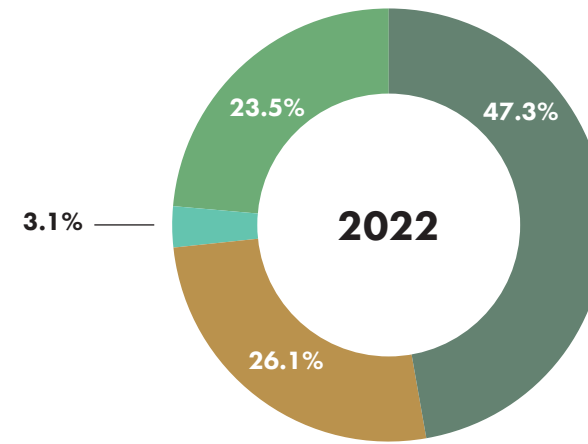
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
2022	315	345	521	1,125	239	383	562	1,137	1,190	2,106	2,916	2,183	13,022
2021	91	146	230	708	249	159	52	102	455	579	325	358	3,454
2020	49,218	63,789	67,794	61,088	60,918	21,212	338	57	40	55	39	26	324,574
% CHG	246.2%	136.3%	126.5%	58.9%	-4.0%	140.9%	980.9%	1,014.7%	161.5%	263.7%	797.2%	509.8%	277.0%

KOREA ARRIVALS BY REGION

	SEOUL	INCHEON/GEONGGI	GYEONBUK/DAEGU	OTHER	TOTAL
2022	51,276	28,312	3,383	25,483	108,454
2021	1,034	469	49	511	2,063
2020	132,466	80,031	13,549	99,063	325,109

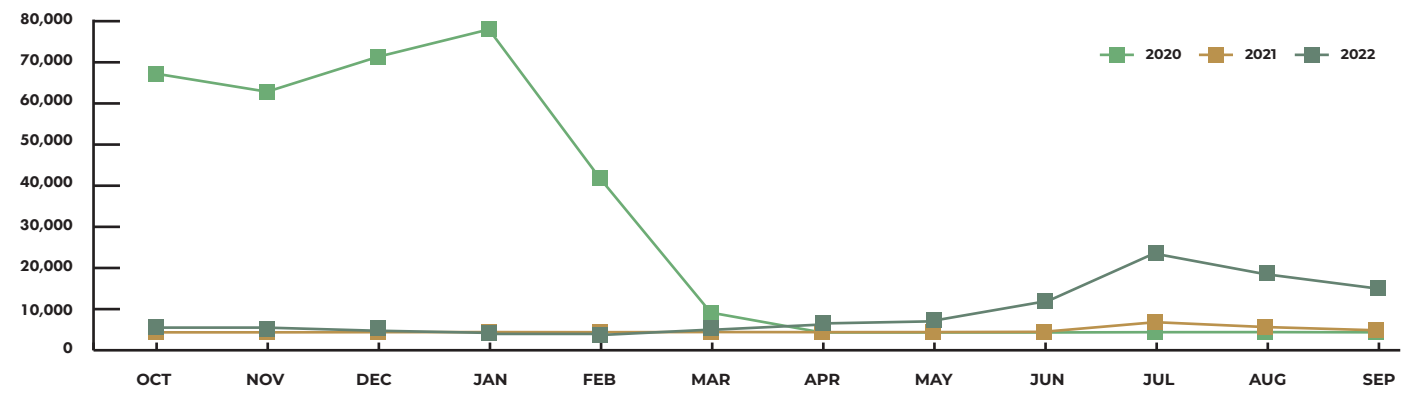


SEAT CAPACITY



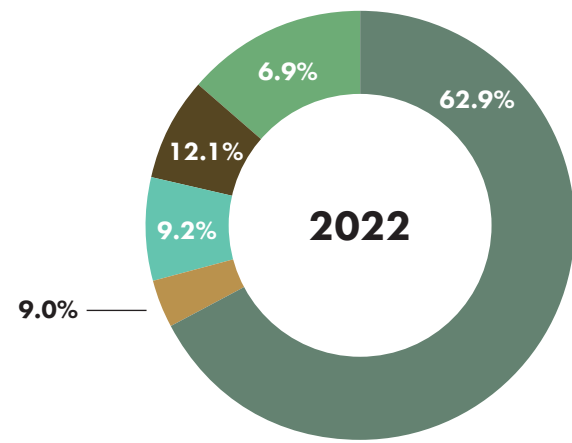
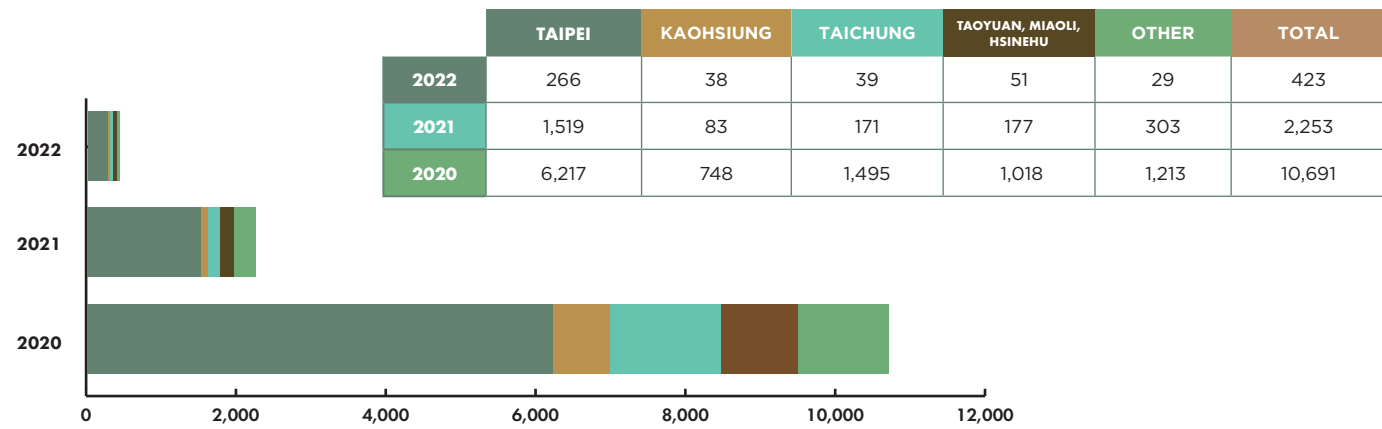
Source: Diio Mi: Market Intelligence for the Aviation Industry

SEASONALITY

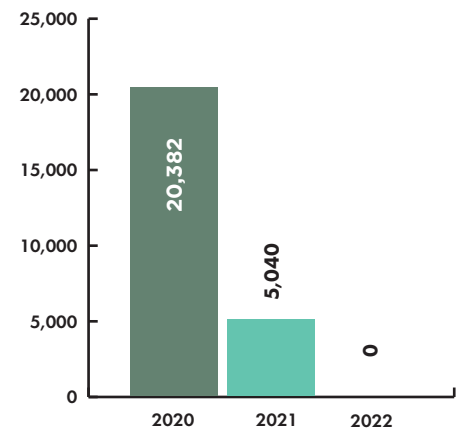


	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
2022	998	3,639	1,459	924	311	760	3,239	9,947	16,298	28,063	24,751	18,065	108,454
2021	37	39	81	104	77	113	86	102	173	303	375	573	2,063
2020	67,124	62,448	71,513	78,609	40,022	5,160	6	4	5	77	95	46	325,109
% CHG	2,597.3%	9,230.8%	1,701.2%	788.5%	303.9%	572.6%	3,666.3%	9,652.0%	9,320.8%	9,161.7%	6,500.3%	3,052.7%	5,157.1%

TAIWAN ARRIVALS BY REGION



SEAT CAPACITY



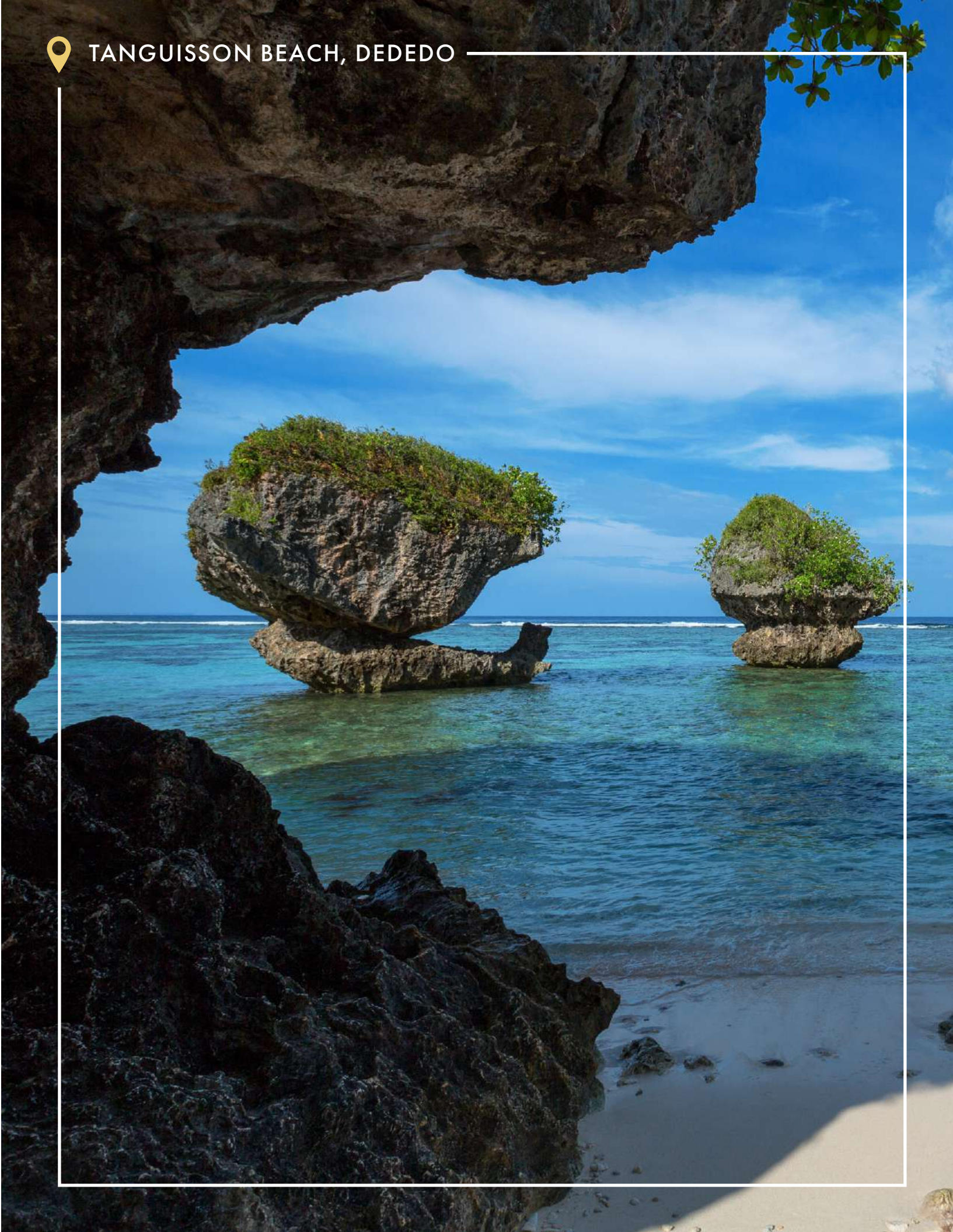
Source: Diio Mi: Market Intelligence for the Aviation Industry

SEASONALITY



	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
2022	28	35	19	21	8	20	20	22	29	37	105	79	423
2021	20	38	10	9	9	11	3	14	45	1,208	868	18	2,253
2020	2,131	2,023	2,004	2,544	1,438	498	4	5	2	15	15	12	10,691
% CHG	40.0%	-7.9%	90.0%	133.3%	-11.1%	81.8%	566.7%	57.1%	-35.6%	-96.9%	-87.9%	338.9%	-81.2%

TANGUISSON BEACH, DEDEDO



 SIRENA PARK, HAGÁTÑA



FINANCIALS

FINANCIAL HIGHLIGHTS

The following table summarizes the change in net position of the Bureau for the fiscal years ended 2022 and 2021.

Statement of Net Position September 30, 2022 and 2021

	<u>2022</u>	<u>2021</u>
Assets:		
Current assets	\$ 30,995,936	\$14,024,694
Security desposit	178,308	133,230
Capitla assets	<u>6,489,602</u>	<u>6,510,171</u>
Total assets:	37,663,846	20,668,095
Deferred outflows of resources	<u>2,898,779</u>	<u>3,719,902</u>
	<u>\$40,562,625</u>	<u>\$24,387,997</u>
Liabilities:		
Current liabilities	\$ 17,770,141	\$1,996,346
OPEB liability	7,323,969	6,649,220
Net pension liability	4,022,867	5,085,558
Accrued sick leave	57,257	40,003
Lease liability	<u>51,595</u>	---
Total liabilities:	<u>29,225,829</u>	<u>13,771,127</u>
Deffered inflows of resources	<u>2,489,701</u>	<u>2,907,894</u>
Commitments and contingencies		
Net position:		
Net investment in capital assets	6,394,752	6,510,171
Restricted - expendable	346,786	392,705
Unrestricted	<u>2,150,557</u>	<u>806,100</u>
Total net position	<u>8,847,095</u>	<u>7,708,976</u>
	<u>\$40,562,625</u>	<u>\$24,387,997</u>

The Bureau's cash balance significantly increased in fiscal year 2022 due to the receipt of federal grant in the form of Coronavirus State and Local Fiscal Recovery Fund ("CSLFR"). A total of \$20 million was received at the beginning of the fiscal year. Consistent with other federal grants, CSLFR funds are restricted in nature for specific purposes as stipulated in the grant compliance supplement. In FY2022, the Bureau expended a total of \$5.5 million in CSLFR funds and is mandated by federal law to undergo an audit on federal expenditures. The audit report and required

grant financials are published on a separate report. As of September 30, 2022, the grant's remaining cash balance is \$14.5 million and is recorded as a component of current assets.

Another notable increase in current asset is the Bureau's receivable balance of \$1.2M. This balance is comprised of receivables due from the Government of Guam for the remaining balance of the Bureau's FY2022 appropriations. Collection of this balance is expected within two months after the fiscal year end.

As required by the Government Accounting Standards Board ("GASB"), the unexpended portion of monies received from federal grants must recorded as deferred revenue. As of fiscal year ending 2022, \$14.5 million from the CSLFR is unexpended and is recorded as a component of current liabilities. This remaining balance has been allocated to the *One Village, One Attraction* project and will be expended within the upcoming fiscal years.

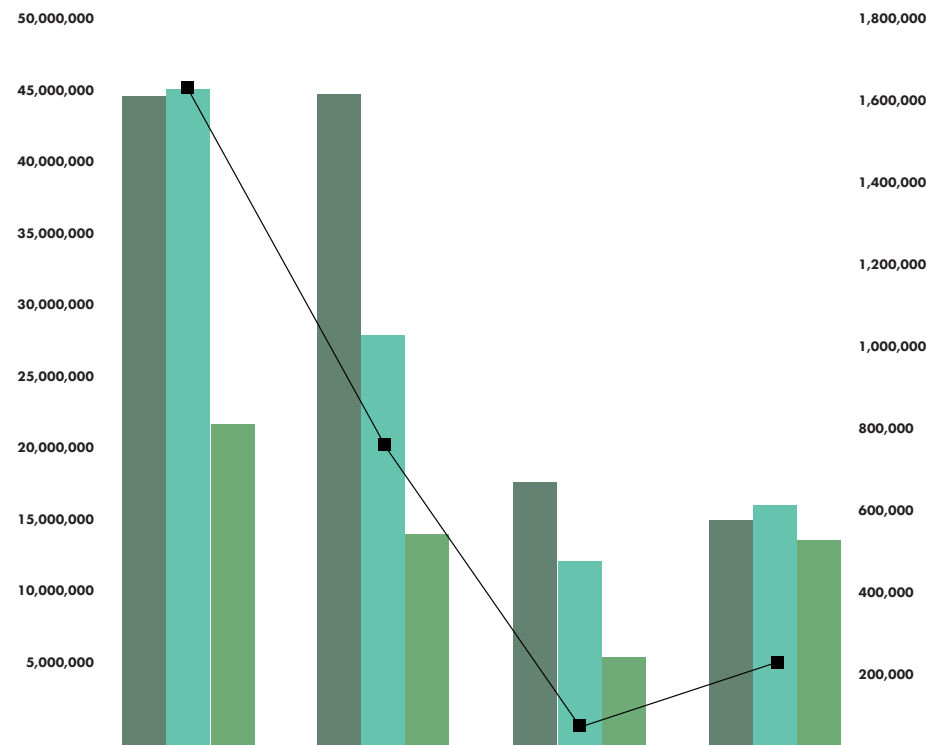
The following table presents a summary of the Bureau's statement of revenues, expenditures and change in net position for the fiscal years ended 2022 and 2021.

Statement of Revenues, Expenditures and Change in Net Position September 30, 2022 and 2021

	<u>2022</u>	<u>2021</u>
Operating revenues	\$ 1,083,827	\$ 209,420
Expenses:		
Professional services	14,640,836	3,909,895
Personnel	3,090,398	3,158,026
Promotional in-kind contributions	802,368	70,121
Miscellaneous	762,122	545,153
Travel	226,906	14,763
Depreciation	188,941	115,420
Rent/Lease	166,738	175,379
Material and supplies	143,360	64,212
Utilities	117,711	125,777
Equipment	114,570	46,944
Repairs and maintenance	27,154	50,962
Foreign Currency Loss	23,344	3,570
Advertising	17,453	12,818
Printing	13,473	3,942
Grants	--	24,999
Consumption Tax	--	1,213
Total operating expenses	<u>20,335,374</u>	<u>8,323,194</u>
Operating revenues net of operating expenses	(19,251,547)	(8,113,674)
Nonoperating revenues (expenses):		
Grants-in-aid from Government of Guam	14,528,287	5,324,249
Federal Contributions	5,919,554	436,028
Interest income	7,533	5,046
Other nonoperating expense	(65,708)	(522,582)
Total nonoperating revenues (expenses), net	<u>20,389,666</u>	<u>5,242,741</u>
Change in net position	1,138,119	(2,871,033)
Net position at beginning of year	<u>7,708,976</u>	<u>10,580,009</u>
Net position at end of year	\$ 8,847,095	\$ 7,708,976



TOURISM ATTRACTION FUND & VISITOR ARRIVALS



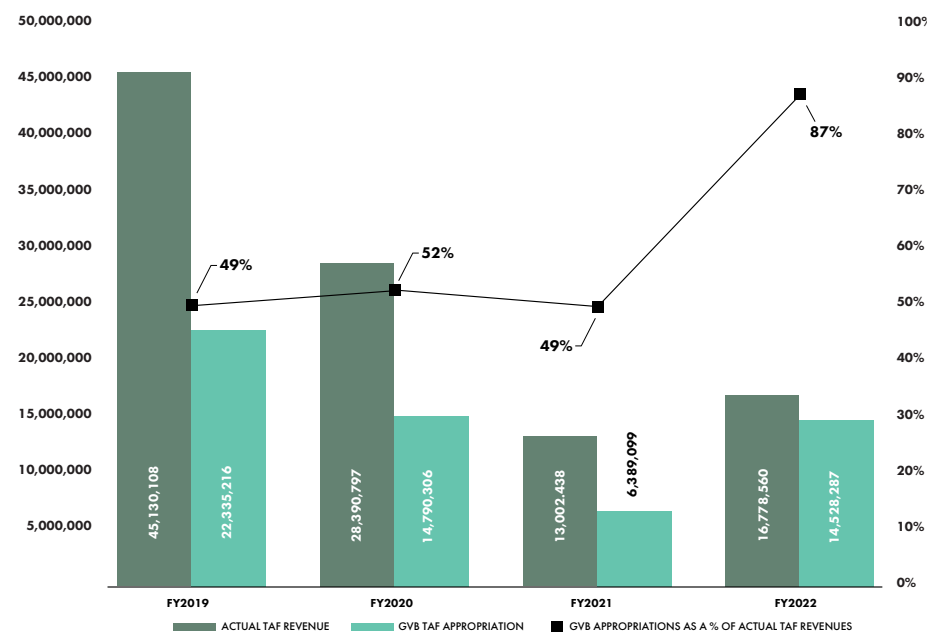
The Bureau's financial position is heavily reliant on appropriations from the Government of Guam, which are recorded in the financial statements as Grants-in-aid from the Government of Guam. Historical data indicate that the Bureau's annual appropriation is directly correlated with the success of tourism arrivals and the Tourist Attraction Fund, which is funded by the 11% hotel occupancy tax, a statutory mandated levy for all residing in a hotel or alternative accommodation.

The graph represents the fluctuation of visitor arrivals in the current and previous years, and its impact to the Tourist Attraction Fund and GVB's appropriations.

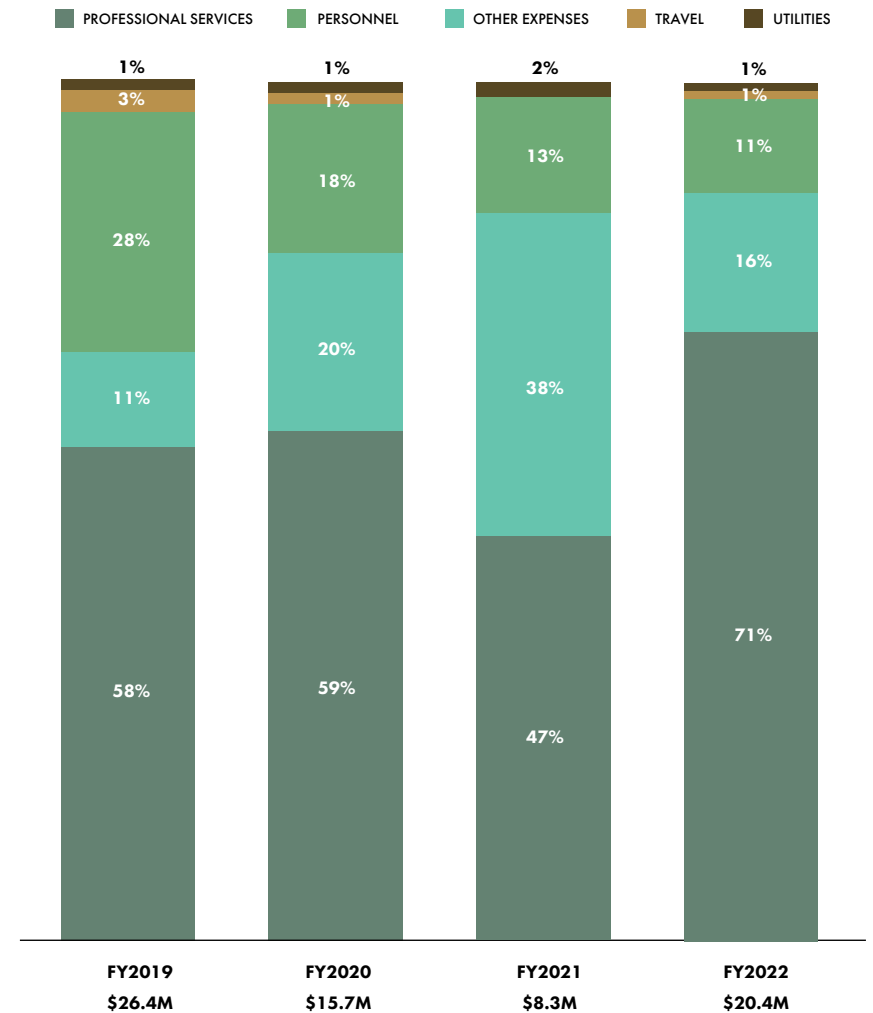
COVID-19 continues its negative impact on the Bureau's financial position. The decreased funding had forced the Bureau to re-strategize its goals and objective. A silver lining, however, is the 87% allocation of the Bureau's budget relative to TAF revenue for fiscal year 2022. Allocation in prior fiscal years range from 49% to 52%. The Bureau aims to continue the 87% allocation in the upcoming fiscal year through its budgetary request.

The graph illustrates the fluctuation of the Bureau's appropriation relative to the overall TAF revenues for the current and previous fiscal years.

GVB APPROPRIATION AS A % TAF REVENUE



OPERATING EXPENSE



In fiscal year 2022, the Bureau concentrated a larger portion of its budget on marketing initiatives and destination development projects. Recorded as professional services, the necessary shift aimed to revitalize Guam's tourism economy and prepare the island for the resumption of international travel. These marketing initiatives include raising awareness through various media platforms, digital campaigns, and engagement in tourism fairs across Japan, South Korea and Taiwan. Travel restrictions in key source markets provided the opportunity to enhance popular tourist sites. The Bureau capitalized on this opportunity and initiated projects involving capital improvement, as well as consistent and effective maintenance. The following fiscal year is anticipated to continue these initiatives and projects.

The graph illustrates the distribution of expenses for the current and previous fiscal years. For purpose of the graph, other expenses include promotional in-kind contribution, depreciation, materials and supplies, utilities, equipment, printing and other miscellaneous operational expense.

Although benefits from these projects and initiatives are not expected to be realized until the upcoming fiscal years due to existing travel restrictions hindering ease of travel for Guam's key markets, the Bureau believes that the investment made will result in an upward trajectory for both visitors and island residents.



Photo by Shanaiha Pauga

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123-A

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ADA'S TRUST & INVESTMENT, INC.

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ADVANCE MANAGEMENT, INC.

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BALDYGA GROUP

Phone: (671) 646-8000
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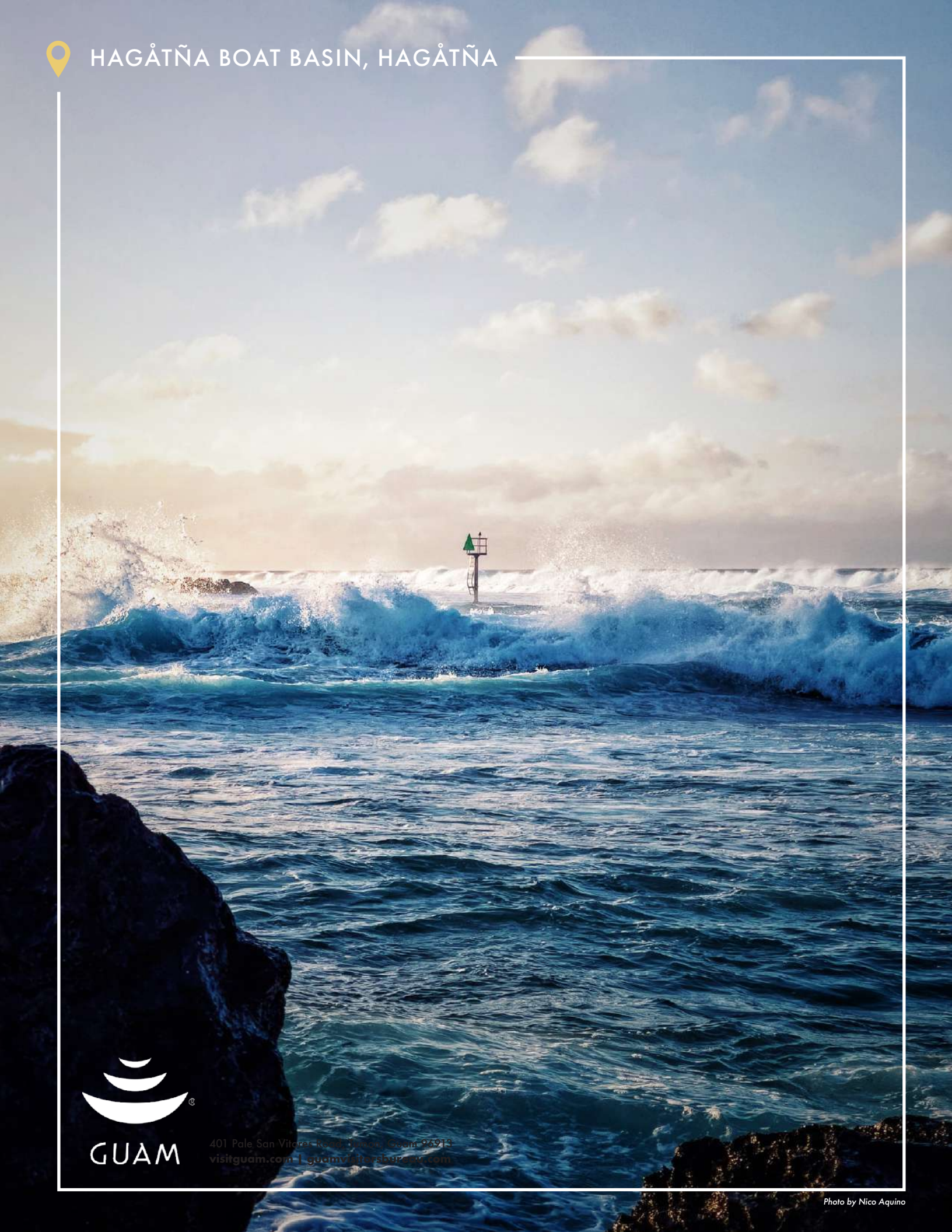
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