

Guam Visitors Bureau Quarterly Membership Meeting

August 14, 2025



Call To Order

**Board Director and Membership Chairwoman
Michelle Merfalen**



GVB MEMBERSHIP MEETING AGENDA

CALL TO ORDER

Michelle Merfalen, Membership Committee Chair

MANAGEMENT REPORT

Régine Biscoe Lee, President & CEO

REVIVING GUAM TOURISM WITH PURPOSE AND SUSTAINABILITY

Jason Lin, Co-Founder & CEO of Hotel Zero

INTRODUCING GSTC (GLOBAL SUSTAINABLE TOURISM COUNCIL) AND JTB JAPAN CASE STUDY

Naomi Oiwa, Japan Market Development Manager, GSTC

ADJOURNMENT

Tour Operators for Korea Promotions



The image displays two brochures for the Guam Visitors Bureau. The left brochure, titled "MEMBERSHIP BENEFITS", lists various advantages for members, including voting rights, networking opportunities, involvement in committees, and exposure in global websites. The right brochure, titled "DISSEMINATION OF MEMBER INFORMATION AT INTERNATIONAL FORUMS", lists benefits such as participation in marketing programs, VIP greeting services, recognition as a sustainable partner, and access to the GVB membership portal. Both brochures feature the Guam Visitors Bureau logo and a background image of a woman smiling.

GUAM VISITORS BUREAU
SETBISSON BISITAN GUAMAN

MEMBERSHIP BENEFITS

VOTING RIGHTS TO ELECT GVB BOARD OF DIRECTORS (4 SEATS OUT OF 13)

- Up to 10 votes for each company and/or individual

NETWORKING OPPORTUNITIES IN GUAM'S LARGEST INDUSTRY

- Exclusive invite to quarterly membership meetings, trainings, and mixers
- Off island trade show delegations
- Coordinate with international expos and/or fairs
- Strengthen Guam's presence and build relationships
- Receive member-only discounts to represent Guam
- FAM Tours and Site visits
- Show what is special with your unique listing
- Self-guided FAM tour offer

INVOLVEMENT IN GVB'S STANDING COMMITTEES

- Insight sharing
- Joint problem solving
- Collaborate with other businesses

GVB CULTURE AND PRODUCT DEVELOPMENT

- Let GVB be your resource for potential speakers and education needs - Highlight the importance of Guam's culture, language, and values.
- Collaboration with cultural groups and organizations

ARRIVAL STATISTICS, RESEARCH INFORMATION, MEMBERS-ONLY DASHBOARD, LATEST TRAVEL TRENDS, TECHNOLOGY IN TOURISM

ANNUAL REPORTS AND MEMBERSHIP DIRECTORY

EXPOSURE IN GVB'S GLOBAL WEBSITES (JAPAN, KOREA, TAIWAN) IN MULTIPLE LANGUAGES, THROUGH LISTINGS, ORGANIZATION EVENTS, SPECIAL OFFERS, CUSTOM ITINERARIES

EXPOSURE IN PROMOTIONAL MATERIALS AND PUBLICATIONS

- Marketing and promo support
- Featured in listings or highlights on VisitGuam and other SNS channels, including in-country social media platforms

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EXPOSURE TO TRAVEL WRITERS, VISITING DIGNITARIES AND SPECIAL GROUPS (DEPENDING ON REQUIREMENTS).

DISSEMINATION OF MEMBER INFORMATION AT INTERNATIONAL FORUMS (CERTAIN GUIDELINES APPLY IN DELIVERY AND HANDLING OF PROMOTIONAL MATERIAL).

PARTICIPATION IN MARKETING PROGRAMS

- Local military travel related shows as approved by military guidelines
- Listing in certain GVB collateral materials
- GVB sponsored product seminars and workshops
- Participation in mailing campaigns
- Advertisement opportunities in GVB communication programs

VIP GREETING SERVICES

RECOGNITION AS GVB'S SUSTAINABLE PARTNER

- Be featured in VisitGuam website as a green partner
- Sustainable initiatives
- Special section on website for eco-conscious travelers to find sustainable accommodations or experiences

OPPORTUNITY FOR COLLABORATION

- Co-host event with GVB

ACCESS TO GVB MEMBERSHIP PORTAL

- Keep profile up to date
- Photos and videos
- Improve and update content for VisitGuam websites
- Provide translations for JKT
- Post events and promos of business

EARLY INVITES TO GVB EVENTS AND INITIATIVES

ADD GVB LOGO TO COMPANY WEBSITE FOR ADVERTISING/PROMOTIONAL PURPOSES

- Logo application
- Business cards/stationary
- Promotional materials

RECEIVE CERTIFICATE INCENTIVE AS A GVB MEMBER

- Fiscal Year member
- Sustainable partner
- Training/certificates

FOLLOW US! @visitguamusa f visitguam

- FY26 renewal
- Promotions include:
 - Inclusion in a dedicated optional tour feature on GVB Korea's special microsite (8/25 - 9/15)
 - Opportunities to be showcased in social media campaigns and monthly giveaways
 - Increased online visibility through GVB's website and digital flyers
 - Exposure through GVB's upcoming airline co-ops and fam tours, upon availability

Report of Management

GVB President & CEO
Régine Biscoe Lee



Tumon Night Market: Bringing “New Life” to Tumon




GUAM

TUMON NIGHT MARKET

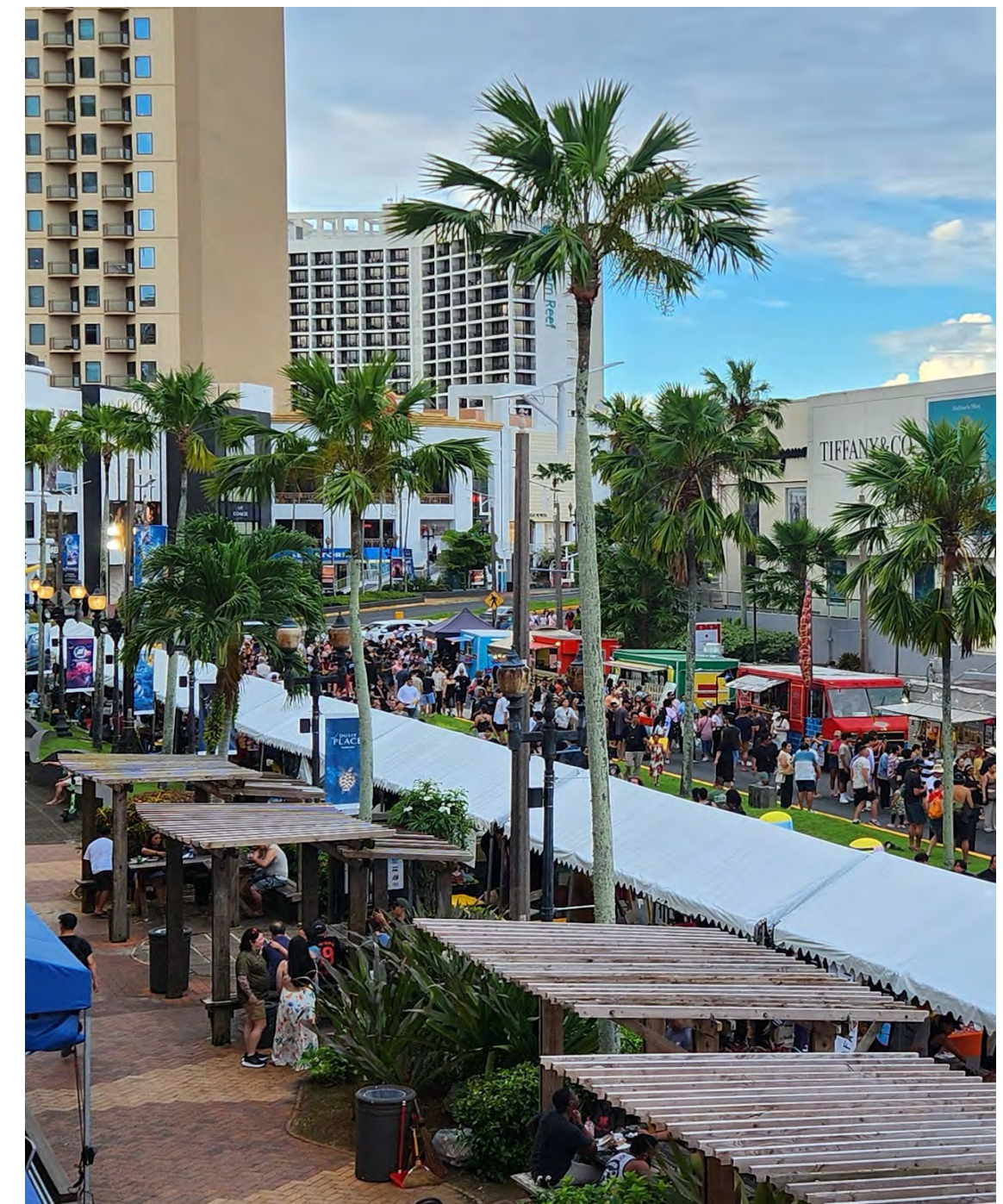
EVERY SUNDAY 5:00 - 9:00 PM

PLEASURE ISLAND

FREE ADMISSION
LIVE MUSIC · DANCE PERFORMANCES
FOOD VENDORS · POP-UP SHOPS
CULTURAL & INTERACTIVE ACTIVITIES · KIDS ZONE

FREE SHUTTLE FROM YPAO (PROA SIDE) TO TUMON NIGHT MARKET
FROM 4:30 - 9:30 PM

For more information, please contact us at info@visitguam.com or (671) 646-5278.
Follow us on Facebook and Instagram for the latest updates! @visitguamusa
This event will run every Sunday through Sept 28, 2025.



Purpose & Vision



- Inspired by CHamoru Village Wednesday Night Market and GVB's BBQ block party
- Visitors and residents enjoy a night market experience in the heart of our tourism district.
- Develop a family-friendly event as the centerpiece of Tumon for visitors, local residents, and to increase local participation in our industry
- Foster community pride

Tumon Night Market Benefits



- Increased Tumon foot traffic & spending.
- Economic boost for local vendors/small businesses. (60+ TNM vendors)
- Destination Appeal
- Free Event (Added visitor value)
- Opportunities for visitors to engage with our island people and products.



Get Involved!



- Interested vendors, sponsors, or entertainers can email tumonnightmarket@visitguam.com for more information
- Let's light up Tumon – Together!



Tourism Recovery



- As part of the GVB Tourism Recovery Plan, GVB's maintenance staff have started painting the medians along Pale San Vitores Rd. Starting from Bishop Flores Circle, to PIC, Royal Orchid, down Hyatt, and continuing onto Westin Hill.



MARKETING HIGHLIGHTS



As of 20250814

June 1-30, 2025



June 1-30, 2025

Total: 53,515 (43.8%)

% Market Mix	Origin	2019	2024	2025	% of 2019
50.7%	Korea	62,364	26,226	27,148	43.5%
25.1%	Japan	40,877	10,861	13,457	32.9%
13.3%	US/Hawaii	8,268	8,269	7,125	86.2%
2.5%	Philippines	1,578	1,151	1,313	83.2%
1.5%	Taiwan	2,952	173	805	27.3%
0.5%	China	697	328	266	38.2%
0.1%	Hong Kong	477	69	42	8.8%

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

Note: June 2025 Daily Arrivals reflect Civilian Air arrivals only

Calendar Year to Date 2025



January – June 30, 2025

Total: 344,433 (43.3%)

% Market Mix	Origin	2019	2024	2025	% of 2019
46.0%	Korea	357,612	204,815	158,424	44.3%
33.2%	Japan	320,360	96,368	114,466	35.7%
11.4%	US/Hawaii	48,426	45,314	39,337	81.2%
2.1%	Philippines	10,162	6,468	7,276	71.6%
1.2%	Taiwan	14,633	1,651	4,150	28.4%
0.6%	China	6,626	2,474	2,223	33.5%
0.1%	Hong Kong	3,240	336	356	11.0%

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

Note: June 2025 Daily Arrivals reflect Civilian Air arrivals only

Fiscal Year to Date 2025



October 2024 – June 30, 2025

Total: 519,689 (43.5%)

% Market Mix	Origin	2019	2024	2025	% of 2019
46.8%	Korea	539,679	307,935	243,223	45.1%
32.8%	Japan	481,143	146,941	170,312	35.4%
11.1%	US/Hawaii	71,024	65,336	57,724	81.3%
2.2%	Philippines	16,565	10,116	11,233	67.8%
1.0%	Taiwan	20,921	2,172	5,354	25.6%
0.6%	China	9,968	3,402	3,205	32.2%
0.1%	Hong Kong	5,268	575	520	9.9%

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

Note: June 2025 Daily Arrivals reflect Civilian Air arrivals only

TAIWAN



Date: August 22 - 25

- Location: Taipei World Trade Center Exhibition Hall 1
- GVB will participate in the 2025 Taiwan International Tourism Expo (TITE) which remains one of Taiwan's largest and most influential travel events, reflecting strong interest in outbound tourism.
- The Guam booth will feature the Taipei-Guam direct flight, Tumon Night Market, and showcase Guam as a top holiday destination for the Mid-Autumn Festival and National Double Ten Holiday.
- GVB will be onsite to conduct visitor surveys and organize interactive stage activities to attract attendees and gain insights into Taiwanese travel trends.



第13屆台灣

國際旅遊展

2025台北食品暨伴手禮國際博覽會

秋季展

8/22-8/25
台北世貿





PATA Travel Mart Bangkok, Thailand August 26-28, 2025



The Guam Visitors Bureau will be exhibiting in the upcoming PATA Travel Mart, one of Asia Pacific's longest-standing international travel trade exhibitions featuring unparalleled networking and contracting opportunities to help travel and tourism organizations access decision-makers, meet new clients, expand their networks, establish new relationships and consolidate existing business partnerships.

The event includes a one-day conference, two-day B2B travel mart, and networking opportunities. GVB will be exhibiting alongside the Marshall Islands in the Micronesia Pavilion.

NEW MARKETS

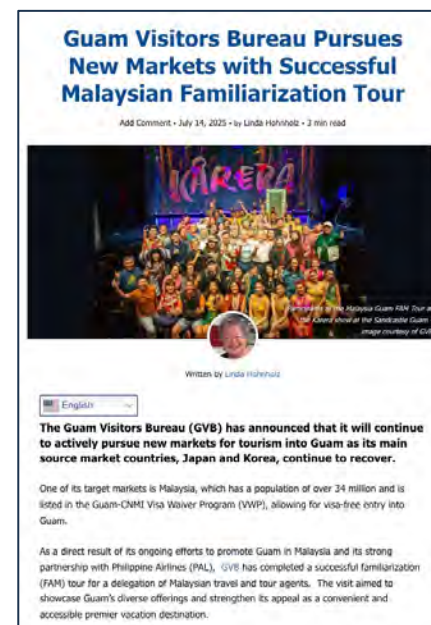
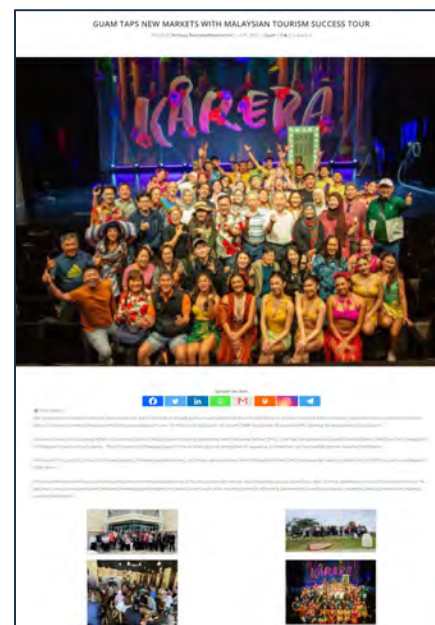


Malaysia FAM Tour & Trade Event June 25-28, 2025

In collaboration with Philippine Airlines (PAL), GVB hosted 24 travel agents and 14 media representatives from June 25-28 for a FAM tour and trade event. The group's arrival is a result of GVB's ongoing efforts to promote Guam in Malaysia and working closely with Philippine Airlines. Malaysia is a market with a tremendous opportunity because is part of the Guam-CNMI Visa-waiver Program.

17

Media Coverage



Utusan Malaysia

Global Travel Media eTN News

MICE



IMEX America Las Vegas, NV October 7 – 9, 2025



IMEX America is the largest trade show in the U.S. for the global MICE travel industry which brings together MICE suppliers and buyers from every sector of the industry from all over the world. Last year's show brought together 15,000 participants from 180 countries.

The Guam Visitors Bureau, Dusit Thani Guam Resort and Leo Palace Resort Guam are planning to participate once again to promote Guam's MICE offerings and incentives.

PHILIPPINES



COLLABORATION WITH AIRLINE PARTNERS

PHILIPPINE AIRLINES SEAT SALE

Booking Period: Ends 17 Aug 2025

Travel Period: On/After 1 Sept 2025

Partnership includes:

- Meta (Dark Boosting) (FB/IG)
- EDM/Direct to Email to Mabuhay Miles Members
- Partner push (banks); web banner; dedicated landing page



UNITED AIRLINES MONTHLY EDM

- UA's and HT&T's (GSA for UA) trade database (*as of July: 4,116 travel agents*)
- Began also sharing on UA's Viber community (*344 travel agents*)

TRADE & MARKETING ACTIVITIES

- **Monthly Travel Trade EDMs**
 - As of July, total of 1,637 trade contacts
- **Manila Bulletin Collaboration**
 - Monthly activity to include IG/FB artcards/album, Tiktok reel, MB print & online articles
- **Guam with Me Campaign**
 - On-going SM posts, Google ads
 - Influencer FAM visit (Sept)
 - OOH Advertising (Sept)
- **Guam Specialist Course**
 - On-line course to empower TAs to create & promote Guam packages
- **B2B/B2C Event Participation**
 - Travel Associations – General Membership Meetings B2B
 - Consumer Expos (Aug & Sept)
 - Networking – ANZCham & AMCham Meetings
- **Guam Product Update & Workshop Roadshow**
 - Cebu, Davao, Iloilo (Sept)



JAPAN

TV TOKYO

- The first episode viewed 1.2M times (3x more than the average for TV Tokyo drama on Tver.
- The X campaign attracted more than 6,000 applicants and 12,000 X followers in one month.
- As a result of campaigns on Expedia timed to coincide with the broadcast of the drama,
- searches increased by 40% year-on-year.
- Skyscanner increased 14%
- Bookings began to increase immediately after the drama aired, which is
120.02% increased YoY
- "We are exploring an ambassador partnership with the drama's leading actor and Peco—an iconic personality with strong ties to Guam
- To maximize emotional resonance, cross-generational reach
- brand affinity through authentic storytelling and influencer-driven engagement
- Episode 7 released yesterday



Guam Search Trends
(on Expedia Japan)

	2022	2023	2024	2025 YTD (as of 29 Jul)
Rank	19	18	17	16
Search volume YoY %	-	+99%	+38%	+40%

JAPAN

Guam Visitors Bureau at Tourism EXPO Japan 2025 Aichi

Dates: Sept 25 - 28, 2025

Venue: Aichi Sky Expo | Trade Days: 25-26 / Consumer Days: 27-28

Main Features

- Entry to B2B buyer meetings
- Consumer-facing booth exhibitions
- PR time on the stage within the Guam Pavilion
- Inclusion of each company's flyers in the GVB eco-bags
- (3,000 bags to be distributed)
- Cultural performance shows organized by GVB/food truck Chamoru food activation
- Talk show featuring cast members from the docu-drama produced by GVB



KOREA



INFLUENCER CO-OP: NIGHT FLIGHT PROMOTIONS

- Period: August 2025
- Hosted influencer FAM tour, inviting 5 influencer groups to [promote Guam night flight travel with optional tours](#)

Ye Young



926K Followers
[@loveeely](#)

Minsome



221K Followers
[@minsme_eo](#)

Seul Gu



154K Followers
[@trip_n_9u](#)

Siniple



148K Followers
[@siniple](#)

Na Yoon



128K Followers
[@na.y.o.o.n](#)

GUAM PROMOTIONAL VIDEO W/ DANCE CREW "NPHER"

- Shooting Period: April 29 – May 4
- Videos: Posted on www.youtube.com/@HafaAdaiGU
- Collaborated with dance crew 'NPher' and filmed Guam promotional video featuring diverse Guam travel spots



KOREA – Guam promotional video with NPher



FY 2026 Air Service Plan



As of 20250814

Airline Solution



Guam unfortunately was hit with a “perfect storm” as flight service began resuming globally.

1. Typhoon as arrivals were picking up
2. Merger of Korean Airlines and Asiana Airlines that the Korean government required the carriers and their LCCs to halt air routes to be fair to other carriers
3. Declaration of martial law in South Korea that resulted in a weaken Won versus the U.S. dollar, in addition to the weak Yen
4. Accidents involving two different Korean carriers (Jeju and Air Busan) resulting in the loss of lives and crafts.
5. Delay of craft delivery

Economic Impact (2021)



SUMMARY ECONOMIC IMPACTS Guam Tourism (2021)



\$128M

Direct Traveler
Demand



\$306M

Total
Economic
Impact



12,425

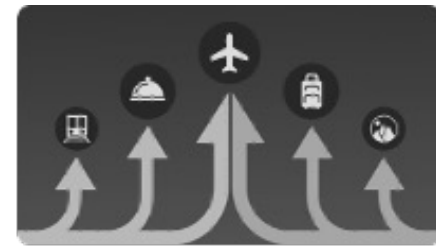
Total
Jobs
Generated



\$57M

Taxes
Generated

Economic Impact - Macro Level



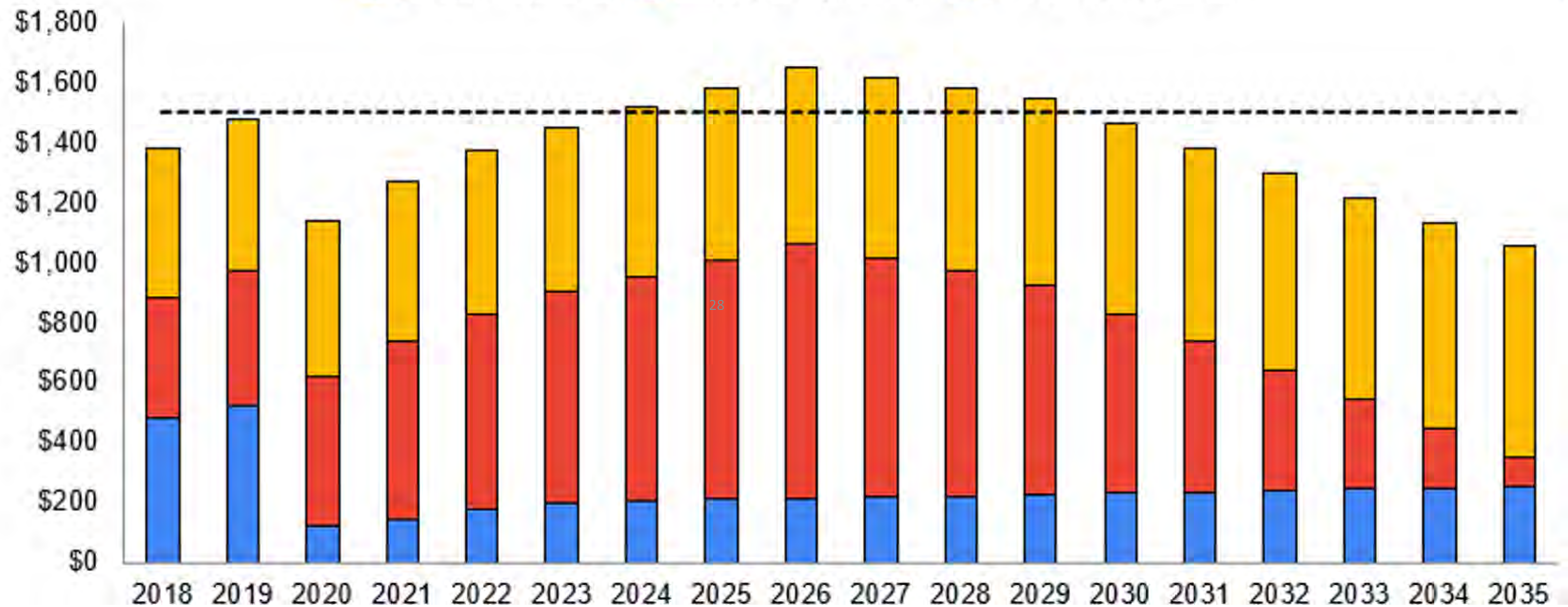
	Arrivals	Direct Traveler Demand	Total Economic Impact	Jobs Generated	Payroll Taxes Generated
2019	1,631,049	\$1.9B	\$2.4B	23,100	\$252M
2021	61,607	\$128M	\$306M	12,425	\$57M
2025*	491,704	\$797M	\$964M	15K	\$212M

*extrapolated based upon historical data as of June 15, 2025

Income Streams

Tourism Revenue (millions), Military Spending (millions) and Other Income (millions)

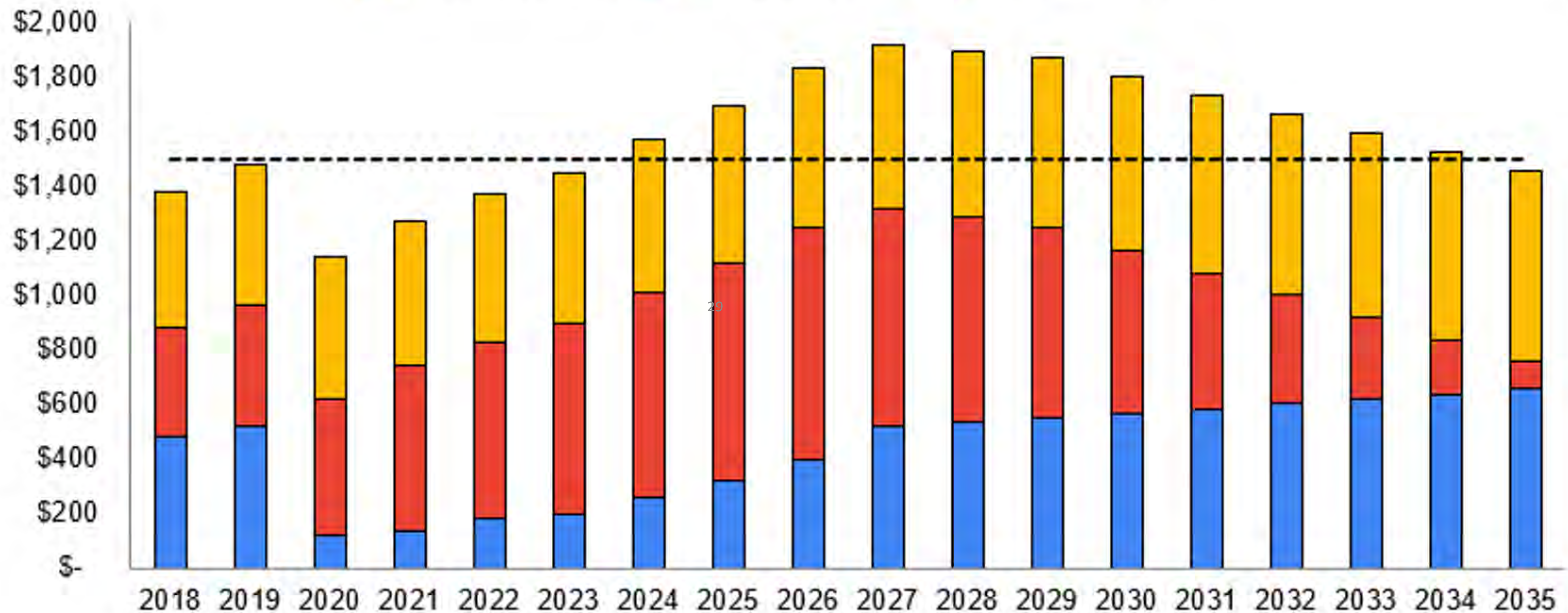
Other Income (millions) Military Spending (millions) Tourism Revenue (millions)



Income Streams

Tourism Revenue (millions), Military Spending (millions) and Other Income (millions)

Other Income (millions) Military Spending (millions) Tourism Revenue (millions)



Original Forecast



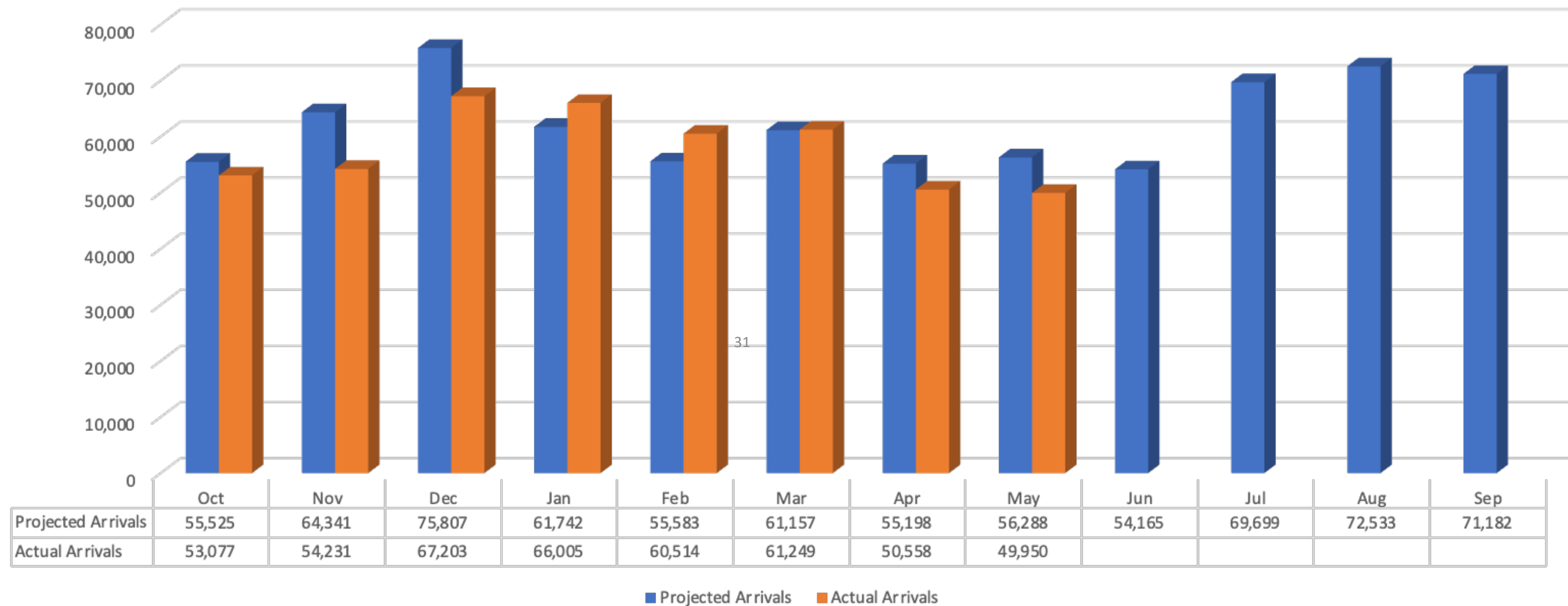
FY2025	Conservative	Moderate	Optimistic
Japan	250,000	290,000	350,000
Korea	377,949	461,731	480,000
USA	85,000	99,300	102,000
PI	12,000	15,731	17,000
Taiwan	3,000	5,270	17,430
Others	35,000	42,000	42,000
Total	762,949	914,032	1,008,430

Forecast made before Korean Air and Asiana merger

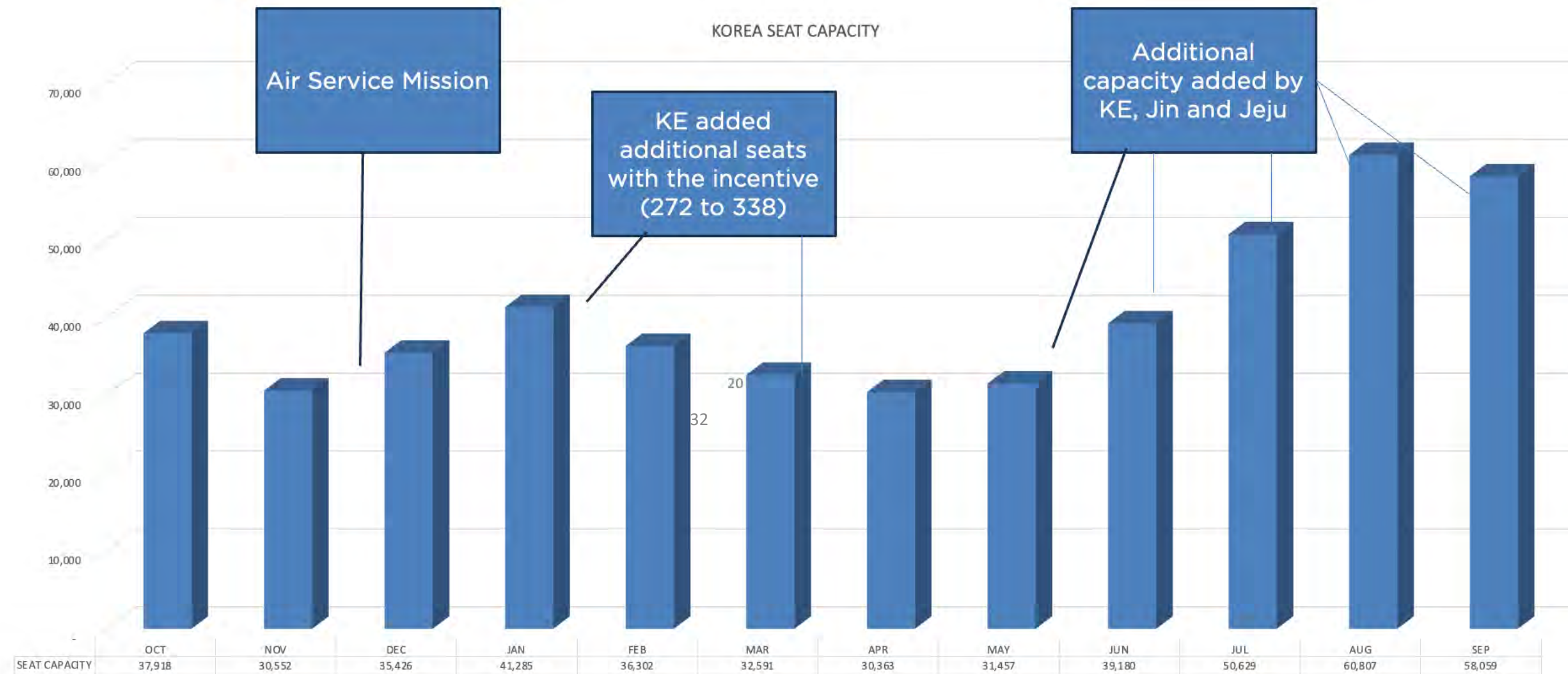
Revised Forecast vs Actual



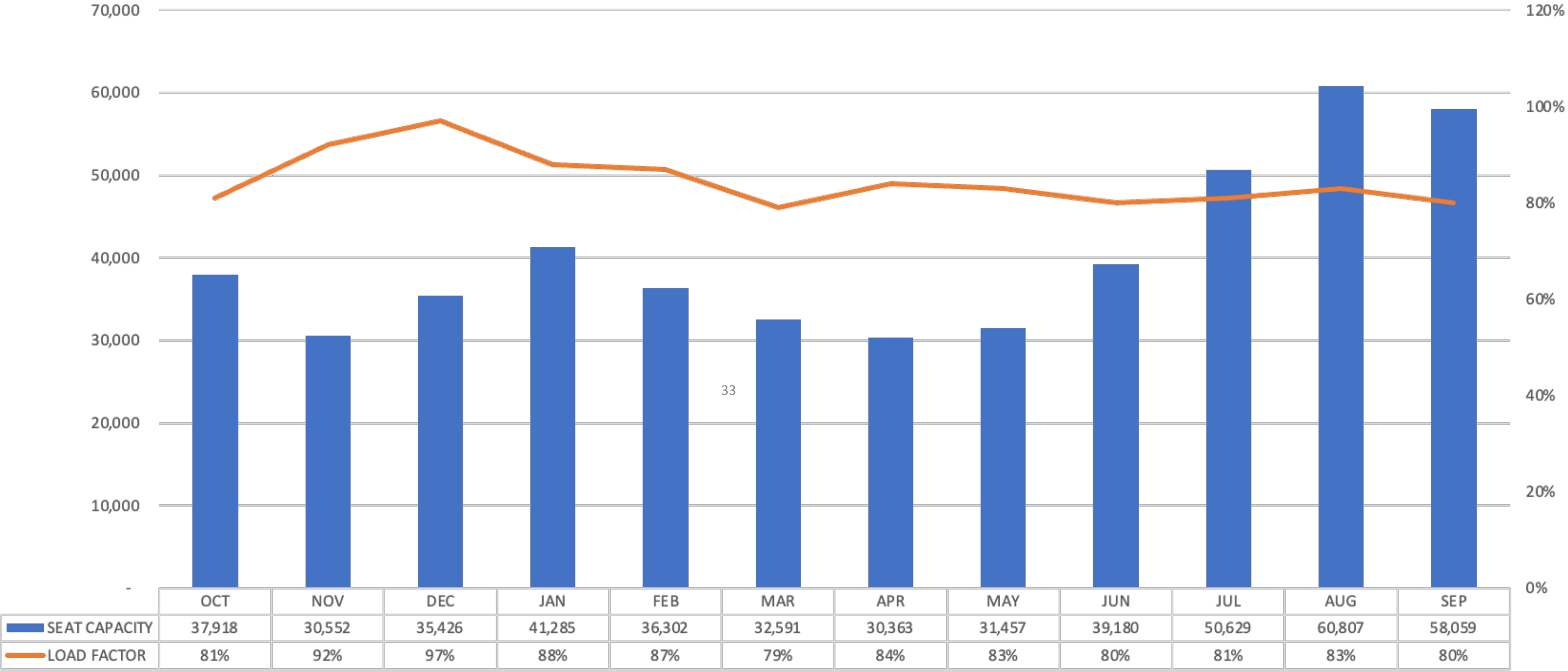
FORECAST VS. ACTUAL



Korea: Current Situation



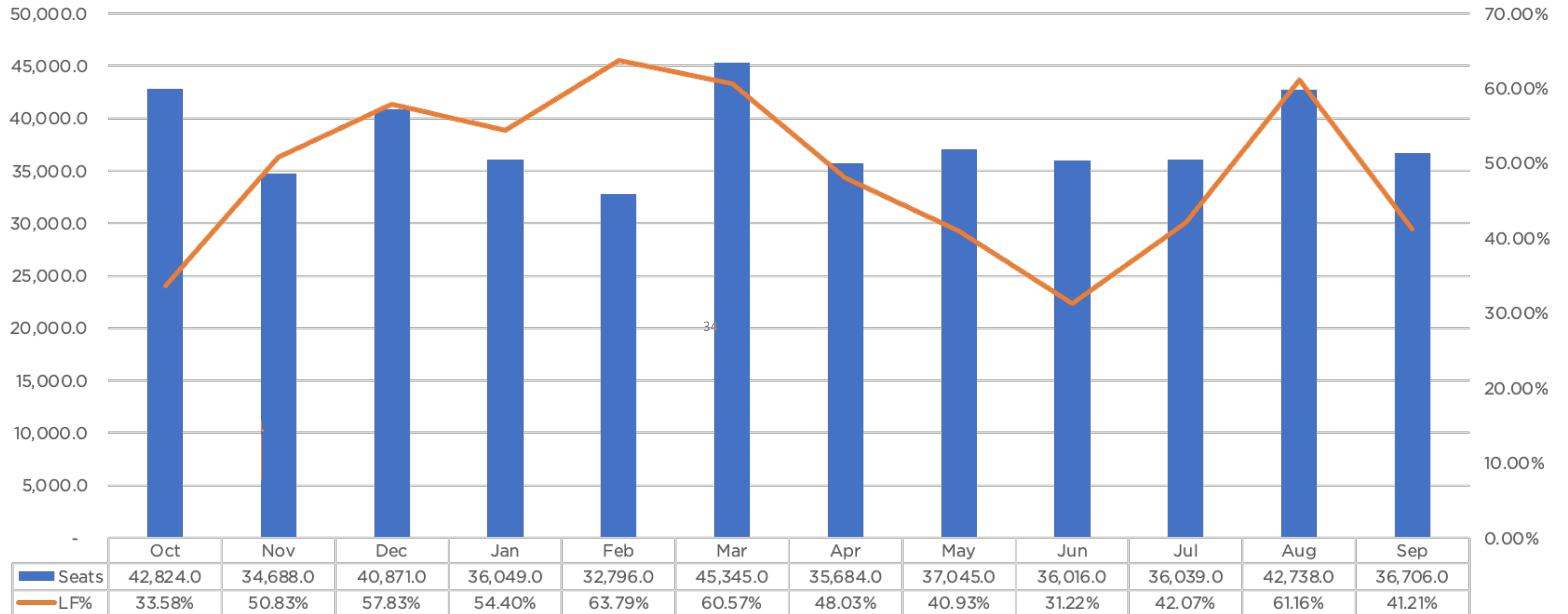
Korea: Current Situation



Japan: Current Situation



Japan Seat Capacity and Load Factor



Airline Incentives Globally



- Incentives for airlines from GVB and others are a necessity and normal
- Difference is how/what is being paid
- Thailand: 95% of landing fees for new destinations
- Hong Kong offers range from HK\$10K (US\$1,271) - HK\$20K (US\$2,547) per trip for new routes
- Denver incentive for new carriers ³⁵ \$7M for unserved routes in Asia (2-year term)
- Some offer incentives and marketing funds such as LAX and SWF

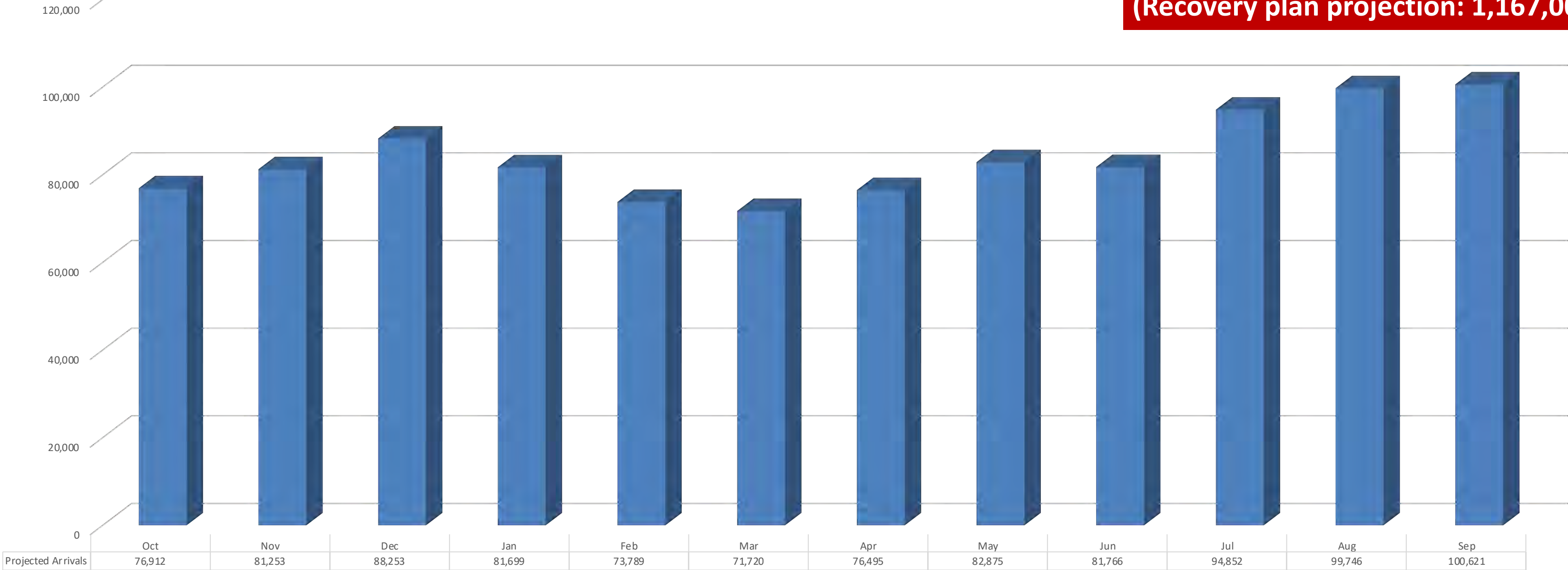
FY26 Optimistic Forecast



Need additional funds beyond
TAF projections to achieve

FY26 Optimistic Forecast

FY26 Optimistic Forecast
w/incentives: 1,044,162
(Recovery plan projection: 1,167,000)



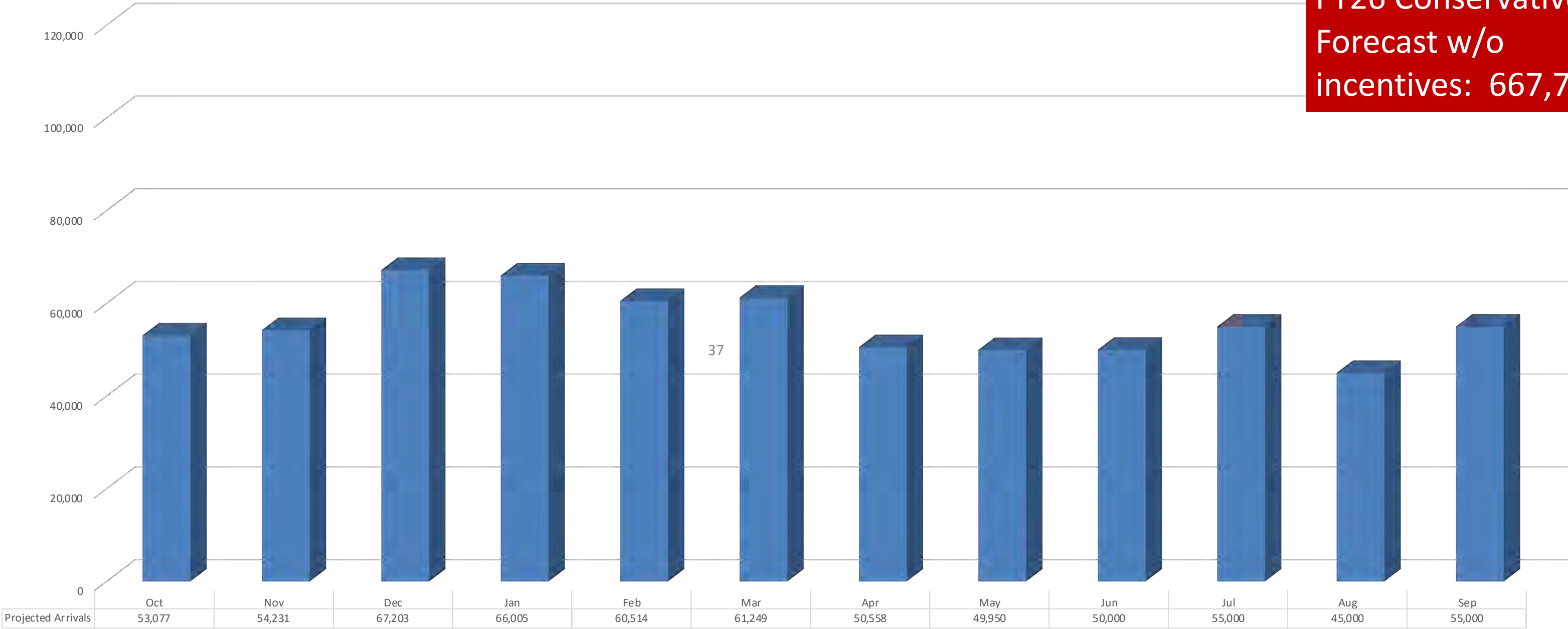
DRAFT

FY26 Conservative Forecast



FY26 Conservative Forecast

FY26 Conservative
Forecast w/o
incentives: 667,787



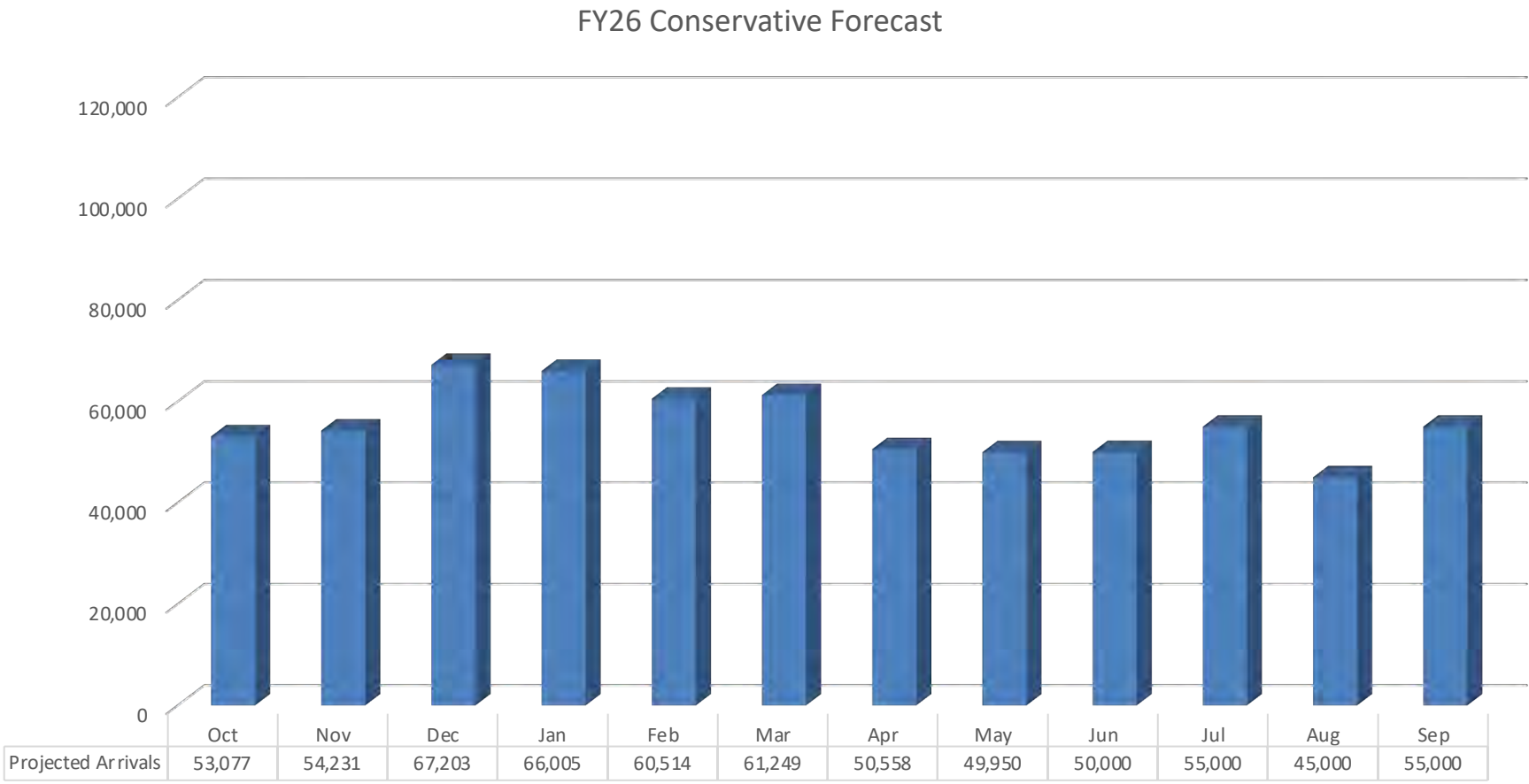
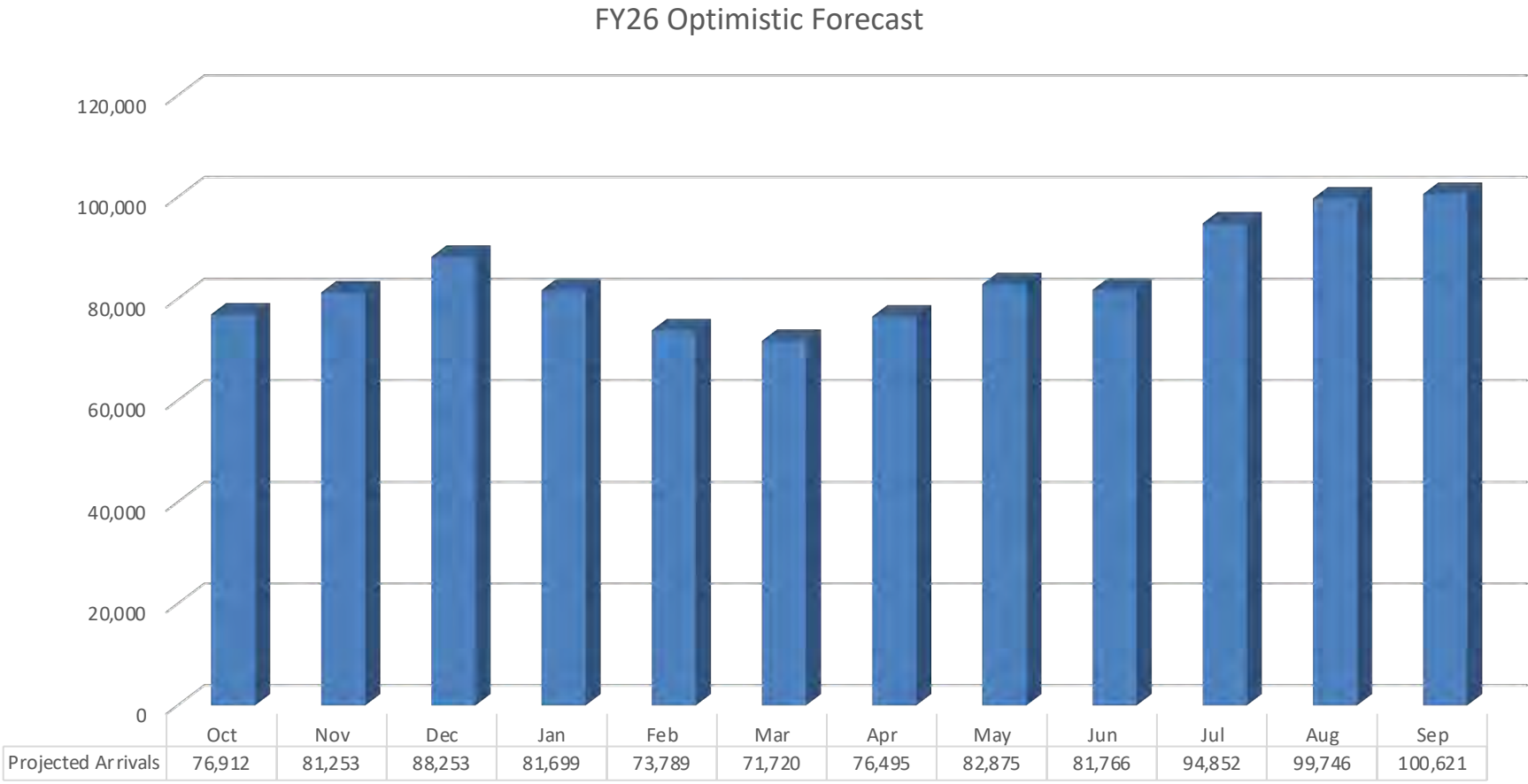
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Optimistic vs Conservative



FY26 Optimistic Forecast
w/incentives: 1,044,162
(Recovery plan projection: 1,167,000)

FY26 Conservative Forecast w/o
incentives: 667,787



DRAFT

Sustainability Initiatives



Internal Initiatives



RECYCLE YOUR PLASTICS
SAVE YOUR PLASTICS (#2 & #5) & DONATE THEM TO G3

What can I donate?
To identify which plastics to recycle, look for either a #2 or #5 inside the recycling symbol, usually found at the bottom or back of the container. All other plastics are not accepted at this time.

Here are examples of what is **accepted** / **not accepted**:

Accepted:

- coffee containers (e.g., Folgers, Café Bustelo) - *coffee lids can't be recycled
- laundry detergent bottles (e.g., Tide, Gain) - *heat-sealed labels are okay
- yogurt containers (e.g., Chobani) - *pls remove all labels
- food containers (e.g., Go Cup) - *pls clean your containers

Not Accepted:

- #7 plastics (ex: water jugs)
- bottle lids with lining

How do I prepare my donation?
Save all acceptable plastics, remove all labels, and clean your donations thoroughly to remove any debris or residue. Unclean plastics won't fuse properly and could break our machines.

Here are some tips and tricks for cleaning your plastics before making your donations:

- use and apply **olive oil** to the affected area(s) once label comes off, please wash off the oil
- soak the plastic in **dish soap and warm water** rinse off and clean the plastic thoroughly
- remove the 5%
- save the 95%
- if possible, use a **butter knife** to remove label carefully from your plastic container
- when all else fails, use a **pair of scissors** and/or a **box cutter** to cut off the affected area

If you have questions or need more info, just reach out using the contact details below.

WHEN WEDNESDAYS ONLY, 3-8PM **CONTACT** 671-683-7715

WHERE PLASTICS RESOURCE HOUSE STE 114 CHAMORU VILLAGE

Logos: UNIVERSITY OF GUAM, GUAM GREEN GROWTH, EPSCOR, Sea Grant UNIVERSITY OF GUAM

- Collection of plastics 2 & 5 to be delivered twice a month to Makerspace located at the CHamoru Village
- Elimination of Plastics & Styrofoam

GVB x G3 Survey



Our Guam Green Growth Partnership was developed to ensure that at GVB we are working towards building an innovative and green Guam, but also stems from the familiarity of SDGs (Sustainable Development Goals) not only with our local community, but across the region for visitors from Japan, Korea, Taiwan, & Philippines.

Attached you will find a brief survey for us to gather insights on sustainability practices you might have internally or are interested in learning.



SI YU'OS MA'ÅSE'



Reviving Guam with Purpose and Sustainability

Co-Founder & CEO of Hotel Zero
Jason Lin



Introducing GSTC (Global Sustainable Tourism Council) and JTB Japan Case Study

Japan Market Development Manager
Naomi Oiwa



Q & A



Adjournment

**Board Director and Membership Chairwoman
Michelle Merfalen**



SI YU'OS MA'ÅSE'

