

WELCOME

**GVB
MEMBERSHIP
MEETING**

December 9, 2022 | 10AM

PLEASE SCAN THE QR CODE TO ACCESS
GVB MEETING AGENDA



REPORT OF MANAGEMENT



President & CEO Carl Gutierrez
Vice President Gerry Perez

AGENDA



10AM | Friday, December 9, 2022

- I. MEMBERSHIP
- II. MARKET ACTIVITIES OVERVIEW
- III. ARRIVAL STATS
- IV. INDUSTRY REPORT
- V. DESTINATION MANAGEMENT UPDATE
- VI. BUSINESS RISK COMPLIANCE & CONTROL
- VII. KEY FINDINGS TO DATE
- VIII. NOMINATION OF DIRECTORS

MEMBERSHIP



- Last meeting held Sept 21, 2022
- Board election voting on Jan 10, 2023
- Eligible voters paid up dues Oct 5, 2022

NOV ACTIVITIES – JAPAN



- #HereWeGuam Roadshow

- Osaka, Nagoya, and Tokyo
- Nov 15-17, 2022
- 100+ participants attended the three venues and industry mixer in Osaka



- CHamoru Food Truck

- Food truck opened at an Okayama event Nov 5-6, 2022



SOUTH KOREA MARKET



- Signed agreements with CHA University Medical Group and Baekseok University
- Partnering with new organizations to further emerging market goals
- Medical and educational tourism



FY2023 Q2/Q3 MARKET ACTIVITIES OVERVIEW



SOUTH KOREA MARKET



SOUTH KOREA MARKET



- T'Way Air to increase frequency from Seoul to Guam - **Dec 2022**
- GVB Korea Roadshow in Busan, Daegu and Gwanju - **Mar 2023**
 - GVB members are invited to join
- International Career & Education Fair in Seoul - **Mar 2023**
- Seoul International Travel Fair (KOTFA) - **May 2023**
- Host online influencers and TAs for ongoing G.I.F.T. events and FAM tours

JAPAN MARKET



Q1

- Japan Year end and New Year period (Dec 23 - Jan 3)
- JTB estimate 150,000 travelers 7.5 times vs LY
- Hawaii, Guam, S. Korea, & Thailand most popular destinations
- Weak Yen and increasing fuel costs an issue, cost of overseas travel to increase +28.7%

JAPAN MARKET



Q2

- Marketing/Brand - graduation travel demand
- SNS/Digital-Driven Communication
 - Targeting 20-34 year olds, “love to travel” market
 - TikTokers highlighting beach-culture-food attractions
- Trade
 - TA FAM to encourage TA to promote Guam
 - Coop activity to capture demand

JAPAN MARKET



Q3 & Q4

- Aviation strategy targets inauguration timing Apr-Jun (before summer break)
 - LCC FAM
 - Regional airport FAM
- Marketing/Brand – sustain SM and digital PR activity
- Trade
 - Co-op TA/OTA enhancements
- Productive dialogue to attract Jetstar Japan service by Q3



TAIWAN MARKET



Q2 & Q3

- SM campaign continues
 - New followers, expanded sites
 - Launch YouTube platform with KOLs Guam visit
- Annual Taiwan Lantern Festival – **Feb 2023**
 - Will have custom-made lantern



**Subject to management approval*

TAIWAN MARKET



Q2 & Q3

- 50th Anniversary Guam Taipei Sister City
- Anticipate air service
 - MICE/OTA Online Marketing Co-op
- Sales Mission in Taipei, Taichung, & Kaohsiung
 - Three-city roadshow sales mission to meet with travel agents and associations
 - Invite tourism partners to join GVB
- Guam Food Festival
 - Will collaborate with a local chef and present CHamoru cuisine to hotel restaurant guests

**Subject to management approval*

NORTH AMERICA MARKET



Q2 & Q3

- Consumer Promotion: Los Angeles Travel & Adventure Show, CA – **Feb 2023**
 - Largest travel and adventure show in the U.S.
 - Opportunity to engage with the VFR market
- Travel Trade Promotion: U.S. Travel Association's IPW Trade Show, San Antonio, TX – **May 2023**
 - Largest travel trade event in the U.S.
 - Strictly for the promotion of U.S. destinations
 - B2B appointment format
 - International buyers are handpicked & sponsored by the U.S. Travel Association

PHILIPPINE MARKET



Q2

- Philippine Airlines x GVB Partnership: TA & Media FAM Visit – **Jan 2023**
 - Encourage creation of Guam packages
 - Increase awareness of Guam as a U.S. destination via media coverage
- Travel Trade Promotion: Philippines Travel Agencies Association International Travel Trade Expo (iTTE) – **Feb 2023**
 - Part of the largest consumer travel show in the Philippines
 - Invited tourism partners to participate in the B2B event
 - Opportunity to tap the ever-growing Philippine market by meeting buyers from all over the Philippines (Luzon, Visayas, and Mindanao)
 - An average of 30 appointments in two days

NEW MARKET



Q2

- Consumer Promotion: Malaysia Association of Travel Trade Agents (MATTA) Fair, Kuala Lumpur, Malaysia – **Mar 2023**
 - Largest consumer show in Malaysia; 150,000+ attendees
 - To educate and increase awareness of visa-free travel
- Sales Mission Collaboration with Alpha Deck – **Mar 2023**
 - 70+ travel agents in Malaysia will be invited for a Guam Product Update
 - Networking opportunity with goal to create Guam packages for visa-free US travel to Guam

ARRIVAL STATS



NOVEMBER 2022



November 1-26, 2022

Total: 33,860 (+336.2%)

% Market Mix	Origin	2020	2021	2022	% to LY
9.2%	Japan	40	268	3,111	1060.8%
66.0%	Korea	35	2,949	22,352	658.0%
0.3%	Taiwan	38	33	102	209.1%
0.2%	China	0	5	60	1100.0%
12.9%	US/Hawaii	751	3,373	4,358	29.2%
2.8%	Philippines	79	357	932	161.1%
0.08%	Hong Kong	2	3	26	766.7%
0.05%	Russia	6	1	16	1500.0%

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

Note: November 2022 Daily Arrivals reflect Civilian Air arrivals only

FISCAL YEAR TO DATE 2023



October – November 26, 2022

Total: 65,293 (+360.5%)

% Market Mix	Origin	2021	2022	2023	% to LY
6.9%	Japan	236	583	4,490	670.2%
68.2%	Korea	72	3,947	44,528	1028.1%
0.2%	Taiwan	58	61	142	132.8%
0.2%	China	7	16	102	537.5%
13.9%	US/Hawaii	3,408	7,334	9,100	24.1%
2.8%	Philippines	316	632	1,833	190.0%
0.07%	Hong Kong	8	5	43	760.0%
0.04%	Russia	9	11	25	127.3%

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

Note: November 2022 Daily Arrivals reflect Civilian Air arrivals only

INDUSTRY REPORT



JAPAN MARKET – DIGITAL PR



TikTok FAM Visit

NOV 26-29

- 116 TikTok influencers team
- Share their experience on Guam via multiple platforms to reach 300 million
- Ocean, city, golf and nature activities



Super Influencer FAM Visit

DEC 3-6

- 3 Super Influencers
- Total followers: 5Million
- Discover new Guam attraction
- Valley of the Latte, Two Lovers Point, Beach activities, and Circus

JAPAN MARKET – TV PR



Tabi Salad

DEC 7-10

- 30-min program; on-air in Feb 2023
- Introduce up-to-date Guam information
- "Guam's Charm from Land, Sea, and Air" theme
- Reach: 41,565,000
- Media value: \$387,736



Yonchan TV

DEC 10-15

- On-air in Dec 2022 – LIVE on-air
- Introduce up-to-date Guam information
- Intend to feature unseen Guam
- Promote immediate demand
- Reach: 5 million

JAPAN - AIR SERVICE



AIRLINES	STATUS	FLIGHT	DEPARTURE	JPN TO GUM	FLIGHT	GUM TO JPN	FREQUENCY	CAPACITY
	Available from Jul 1, 2022 (Except Wed)	UA 827	NRT	11:15 / 16:05	UA 828	6:55 / 9:55	Mon, Tue, Thu, Fri, Sat, Sun	166
	Available	UA 197	NRT	17:30 / 22:20	UA 196	13:05 / 16:05	Daily	166
	Available from May 8, 2022 <i>*Suspended between 10/30 - 12/14</i>	UA 874	NRT	21:05 / 1:45 +1	UA 873	17:05 / 19:50	Sun	166
	Available from Aug 1, 2022 (Mon, Fri)	UA 136	NGO	11:20 / 15:55	UA 137	7:30 / 10:20	Mon, Fri	166
	Suspended until December 31, 2022	UA 172	NGO	20:50 / 1:25 +1	UA 171	17:00 / 19:55	Daily	166
	Available from Jul 1, 2022 (Wed, Fri, Sun) <i>* Between 10/30 - 12/14 (Wed&Sun)</i>	UA 150	KIX	11:05 / 15:45	UA 151	7:10 / 10:10	Wed, Fri, Sun	166
	Suspended until December 1, 2022	UA 178	KIX	20:50 / 1:20 +1	UA 177	16:50 / 19:50	Tue, Thu, Sat	166
	Available from Aug 1, 2022 (Thu, Sun)	UA 166	FUK	11:50 / 16:50	UA 165	07:40 / 10:50	Thu, Sun	166
	Available from Aug 1, 2022 (Thu, Sun) <i>Suspended from Oct.</i>	JL941	NRT	9:30 / 14:15	JL942	16:50 / 19:35	Thu, Sun	199
	Suspended until December 31, 2022	TW311	KIX	10:45 / 15:10	TW312	16:10 / 19:00	Daily	189
	Available from Dec 22, 2022 to Mar 31, 2023	7C182	NRT	10:05 / 15:00	7C189	16:10 / 19:00	Daily	189
	Suspended until December 31, 2022	7C3174 7C3184 (Tue)	KIX	10:10 / 14:50	7C3173 7C3183 (Fri)	15:50 / 18:20	Daily	189

JAL: Scheduled to operate on December 22, 25, 29, 30, 2022 and January 3, 5, 9, 2023

SOUTH KOREA - AIR SERVICE



DECEMBER SCHEDULE

• I N C H E O N - G U A M

**Airline schedule is flexible, subject to change.*

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE421	DAILY	09:15	14:35	8,432
	KE423	WED/THU/SAT/SUN (December 21- 4/w)	19:35	00:50+1	1,904
Jeju Air	7C3102	DAILY	10:05	15:25	5,859
	7C3106	DAILY	20:10	01:35+1	5,859
Jin Air	LJ643	DAILY	09:35	14:50	5,859
T'way Air	TW301	WED/THU/SAT/SUN (December 23- daily)	10:15	15:40	4,158
TOTAL					32,071

• B U S A N - G U A M

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jeju Air	7C3154	DAILY	21:35	02:35+1	5,859
Jin Air	LJ773	DAILY	08:30	13:30	5,859
TOTAL					11,718

TOTAL OUTBOUND SEAT CAPACITY: 43,789 SEATS

SOUTH KOREA - AIR SERVICE



JANUARY SCHEDULE

• I N C H E O N - G U A M

**Airline schedule is flexible, subject to change.*

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE421	DAILY	09:15	14:35	8,432
	KE423	WED/THU/SAT/SUN	19:35	00:50+1	4,080
Jeju Air	7C3102	DAILY	10:05	15:25	5,859
	7C3106	DAILY	20:10	01:35+1	5,859
Jin Air	LJ643	DAILY	09:35	14:50	5,859
T'way Air	TW301	DAILY	10:15	15:40	5,859
TOTAL					35,948

• B U S A N - G U A M

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jeju Air	7C3154	4/W (January 18- 6/w)	21:35	02:35+1	3,780
Jin Air	LJ647	DAILY	08:30	13:30	5,859
TOTAL					9,639

TOTAL OUTBOUND SEAT CAPACITY: 45,587 SEATS

SOUTH KOREA - AIR SERVICE



FEBRUARY SCHEDULE

• I N C H E O N - G U A M

**Airline schedule is flexible, subject to change.*

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE421	DAILY	09:15	14:35	7,616
Jeju Air	7C3102	DAILY	10:05	15:25	5,292
	7C3106	DAILY	20:10	01:35+1	5,292
Jin Air	LJ643	DAILY	09:35	14:50	5,292
T'way Air	TW301	DAILY	10:15	15:40	5,292
TOTAL					28,784

• B U S A N - G U A M

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jeju Air	7C3154	DAILY	21:35	02:35+1	5,292
Jin Air	LJ647	DAILY	08:30	13:30	5,292
TOTAL					10,584

TOTAL OUTBOUND SEAT CAPACITY: 39,368 SEATS

DESTINATION MANAGEMENT UPDATE



78th LIBERATION DAY RECAP



GVB partnered with the Governor's Office and the Mayors Council to successfully present the Liberation Day parade and Fandanña Friday festivities

VISITOR SAFETY OFFICER PROGRAM



VSOs increasing foot patrols and presence to assist visitors



VSOs monitoring beachside



VSOs provide security for GEC Early General Election Voting in Tumon

VISITOR SAFETY OFFICER PROGRAM



Public safety agencies working closely with VSOs to protect our community and provide safe tourism

VISITOR SAFETY OFFICER PROGRAM



Foot and bike patrol presence along Tumon

BEAUTIFICATION



Fort Santa Agueda



Senator Angel Leon Guerrero
Santos Latte Stone Park



Tutujan Park

Hagåtña Park beautification progress: water blasting and painting

GUAM ISLAND FIESTA TOUR



Experience island culture
Join us through-out the year at the Guam Island Fiesta Tour (GIFT)

HOLIDAY ILLUMINATION



**DEC 5, 2022 -
JAN 7, 2023**

Illumination @
Skinners Plaza,
Government
House, Plaza de
España, & San
Vitores Circle



HOLIDAY PROMOTIONS



#InstaGuam
Holiday Edition

Win \$150 Cash Weekly Contest

Featuring a different theme each week

Submit your best photos and videos at
visitguam.com/instaguam

The poster displays eight example photos in a grid: a sunset, a landscape, a sunset over water, a night view of a globe, a waterfall, a close-up of flowers, a person in a boat, and the Guam logo.

- \$150 each week with the return of the #InstaGuam photo and video contest
- Weekly themes for six weeks

- Share your holiday offers on our GVB consumer website
- Contact marketing@visitguam.com

Who doesn't love a good discount or special?

If you're a local or military resident, you're eligible for all these great deals on food, attractions, tours, hotel stays, and more! It's the perfect excuse and time for a staycation on our island paradise. Grab your friends and family and plan that get-together you keep postponing or take your significant other on a much-needed date night. Spend some quality time with your loved ones at the best prices on-island at a discounted rate!

Please check this page often and take advantage of these specials! We're always updating the latest and greatest deals that Guam has to offer.

VIEW BY: Grid, List, Map

SEARCH

CATEGORIES

- Shopping (6)
- Restaurants and Nightlife (6)
- Activities and Attractions (7)

CLEAR FILTERS

1 9 of 10

Offer Name	Valid Dates	Action
Outlet Menu	Valid: December 1, 2022 - January 1, 2023	Add to Trip
DUSIT THANI - SEASON OF GIVING OUTLET MENU	Valid: December 1, 2022 - January 1, 2023	Add to Trip
FESTIVE DINING	Valid: December 1, 2022 - January 1, 2023	Add to Trip
FREE DOCOMO PACIFIC WI-FI CARD WITH MIRI RENTAL	Valid: December 1, 2022 - January 1, 2023	Add to Trip
GIFT CERTIFICATE	Valid: November 18, 2022 - January 1, 2023	Add to Trip

BUSINESS RISK COMPLIANCE & CONTROL



- Board meetings paused pending revision of by-laws and clarification of board & management roles
- BRCC Committee established (May 2022) to review GVB enabling statutes, harmonize with by-laws, and examine decades of board and management operating practices
 - GVB-VP G. Perez; GVB Director J. Jones; Attorney Ron Aguon; UOG Professor PA; open government, public corporate governance, & ethics expert and Attorney Joe McDonald (representing GVB and not the directors or management)
- Sept progress report (75% phase 1) membership and public meeting
 - BRCC Phase 1 final report today
 - BRCC Phase 2 and beyond: Lots of issues to unpack from decades of GVB embedded practices
- GVB Quarterly BRCC reviews moving forward, deep dive into other issues; board action on recommended correctives

KEY FINDINGS



- Revised by-laws done and ready for review and approval at the GVB Annual Meeting January 2023
- Summary available at the desk when you exit
- Complete by-laws will be posted on website
- Budget and approval authority process
- Management realignment and re-establishing Financial Controller/CFO position, maintaining independent review over HR and Admin functions
- Troublesome issues documented on OGL, procurement and ethics laws
- GVB management focused on tourism recovery, not distractive issues uncovered during BRCC review

REFERRALS



- Will share BRCC findings with appropriate officials for their examination and appropriate disposition: OPA, Ethics Commission and Attorney General
- Some issues implicate specific vendors and directors
- Not at liberty to disclose identities
 - Protect integrity of investigation
 - Respect for rights to due process
 - Protect good name if findings prove erroneous

KEY FINDINGS TO DATE

Atty. Joe McDonald



NOMINATION OF DIRECTORS



SI YU'OS MA'ÅSE'

