

NORTH AMERICA, PACIFIC, PHILIPPINES, NEW MARKETS

COMMITTEE MEETING

MON, NOVEMBER 18, 2024



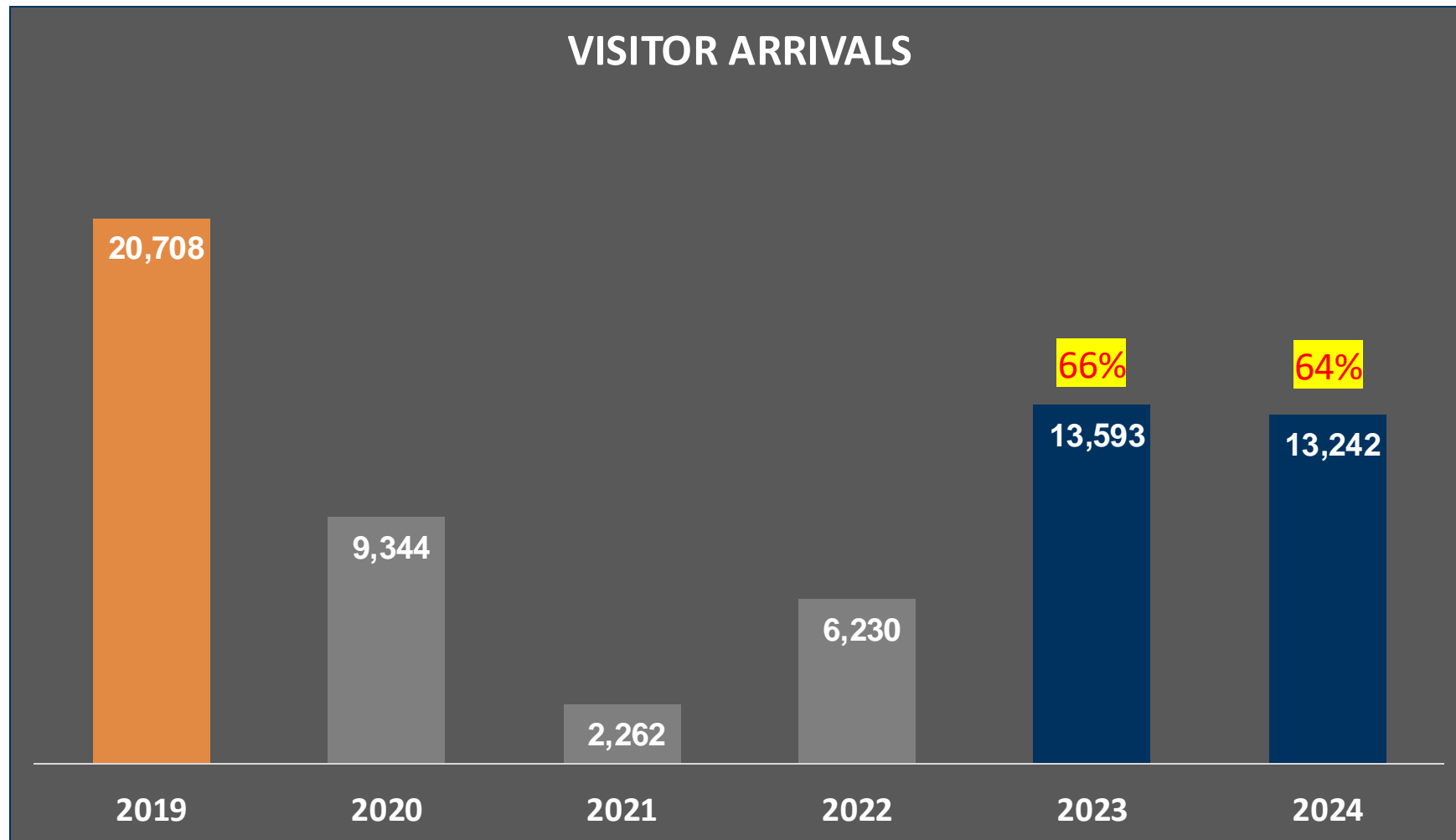
PHILIPPINES MARKET



WHERE WE WERE



VISITOR ARRIVALS



VISITOR ARRIVALS



VISITOR ARRIVALS AS OCTOBER 1-18, 2024

Market	Total MTD 2019	Total MTD 2023	Total MTD 2024	% to LY
Philippines	750	496	646	30.2%

86% of 2019

Market	Total CYTD 2019	Total CYTD 2023	Total CYTD 2024	% to LY
Philippines	15,055	10,486	10,240	-2.3%

WHERE WE'RE GOING



FY2025 PHILIPPINES ARRIVAL PROJECTION

MNL-GUM	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	July 2025	Aug 2025	Sept 2025	TOTAL
SEAT CAPACITY	10,563	10,020	10,188	10,354	9,352	10,582	10,950	11,315	10,950	11,315	11,315	10,020	126,924
MNL-GUM	Oct 2024	Nov 2024	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	July 2025	Aug 2025	Sept 2025	TOTAL
ESTIMATED ARRIVAL													
TOTAL	1,309	1,241	1,262	1,283	1,159	1,311	1,357	1,403	1,358	1,403	1,403	1,242	15,731

**Target LF for Filipino travelers is conservatively at 12.4%; potential to increase is present

Not included in the above is United Airlines' recently launched Cebu-Narita route. Strategy includes a Cebu-Narita-Guam campaign.

UA184

9 flights per week*, 166 seats, Boeing 737-800

*above factors 7 flights/week

PR110

7 flights per week, 199 seats, Airbus A321 / 168 seats, Airbus A320

HOW WE'RE GOING TO GET THERE



FY2025 PHILIPPINES MARKETING PROJECTS

REGIONAL & NICHE TARGET MARKETS

- Metro Manila (*Makati, Taguig, Quezon City*); Cebu City; Davao City; Iloilo City; Baguio City
- Affluent and Established Leisure Travelers; Expats; U.S. Visa Holders; MICE/SMERF Groups

TRAVEL TRADE

- Partnership with United Airlines & Philippine Airlines
- Participation at Travel Expos
- Networking with Travel Agencies & Associations
- U.S. Commercial Service MICE Event

SNS / DIGITAL MEDIA

- Targeted Boosting
- SNS Campaigns
- Travel Booking Platforms
- Local Media (Newspaper)

MARKET DEVELOPMENT

- Collaboration with Sport Groups
- Relations with the Philippine Government (Visa Waiver Initiative)
- In-Market Event & Campaign

FAMILIARIZATION TOURS

- Familiarization Tours with Key Influencers and Media for User-Generated Content

MARKETING ACTIVITIES



MANILA BULLETIN CAMPAIGN

- Manila Bulletin published an editorial feature on November 5 in print and online.
- Editorial promoted Guam as the next place to visit for 2025.
- Highlighted Guam's tours, thrilling marine experiences, unique flavors of Guam, and immersive activities.



FOOD AND TRAVEL LIFESTYLE

Greet 2025 with meaningful experiences in Guam, US

What a perfect way to kick off the new year - exploring an American destination near Manila that's still off the beaten path!

BY MB LIFESTYLE

Nov 5, 2024 11:43 AM

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With 2024's travel goals in the rearview, now is the time for travelers to refresh their bucket lists with more meaningful journeys for 2025. According to trend reports from Expedia and Booking.com, vacationers are moving away from crowded global hot spots toward tranquil, lesser-known destinations that provide space for relaxation and reflection. The travel landscape in 2025 will focus on personal growth, with an emphasis on wellness, eco-conscious tourism, and meaningful experiences that prioritize the quality of travel over quantity.

An **MANILA BULLETIN** article you should read on — Guam might just be the ideal place to:

Pl: With emerging trends in wellness and off-the-beaten-path travel, Guam is positioned as a leading destination for the year ahead.

m Here are reasons why Guam rises as a 2025 travel hotspot.

ac Full story:

th

MB.COM.PH

Greet 2025 with meaningful experiences in Guam, US

What a perfect way to kick off the new year - exploring an American destination near Manila t...

MARKETING ACTIVITIES



ASIA PACIFIC INVITATIONAL

- Guam welcomed two youth sports groups from the PI from Oct 29 - Nov 4, 2024.
- A total of 47 players, officials, and booster fans visited Guam for this event.
- GVB provided the players with Guam-branded promo items as welcome gifts.



NORTH AMERICA MARKET



2024 MARKETING HIGHLIGHTS



LA Adventure Travel Show



Guam Homecoming Campaign



IPW 2024



IMEX America 2024

- GVB participated in several travel trade and consumer shows in 2024 to continue to promote Guam to North American travelers
 - LA Adventure Travel Show
 - IPW 2024
 - PIFA 2024
 - IMEX America 2024
- GVB and United Airlines collaborated to launch the Homecoming Campaign targeting VFR market. Campaign resulted in over 1,100 travelers availing to the 30% discount to visit Guam during the 80th Guam Liberation.

WHERE WE WERE



82,794



FY2023 YTD



4.4%

86,435

92% of FY2019



FY2024 YTD

Total U.S. Visitors in Guam
FY2023 vs FY2024

VISITOR ARRIVALS



Visitor Arrivals as October 1-18, 2024

Market	Total MTD 2019	Total MTD 2023	Total MTD 2024	% to LY
US/Hawaii	2,992	3,798	3,180	-16.3%

Market	Total CYTD 2019	Total CYTD 2023	Total CYTD 2024	% to LY
US/Hawaii	74,535	67,453	70,022	3.8%

FY2025 MARKETING PROJECTS



TRAVEL TRADE CO-OP

- Airline Co-op Promotions: Homecoming Campaign
- Co-op with leading travel wholesaler to promote diving and adventure travel

PR / ADVERTISEMENT

- Content Production
- OOH / Media Ads
- Consumer Brand Collaboration
- Media Tie-in Project

SNS / DIGITAL MEDIA

- Influencer Co-op
- SNS Promotion & Campaign
- Digital Media Buying

FAM

- Familiarization Tours – Airlines, Travel Agencies, Media, Influencers, etc.

MARKET DEVELOPMENT

- Travel trade and consumer show participation
- VFR/Diaspora outreach and targeting

PACIFIC MARKET



2024 MARKETING HIGHLIGHTS



PATA Micronesia Chapter Meeting



Micronesia Island Forum



PATA Travel Mart

- GVB continues to be involved with PATA Micronesia Chapter, the marketing arm of the region endorsed by the Micronesia Island Forum leaders.
- GVB presented to islander leaders on behalf of the Regional Tourism Committee during the Micronesia Island Forum in June 2024 on Guam.
- GVB leads efforts to promote travel to Guam and Micronesia through collaboration with regional tourism partners, the Marianas Visitors Authority and Palau Visitors Authority, in the largest travel trade event in Asia Pacific (PATA Travel Mart).

WHERE WE WERE



31,539



FY2023 YTD

-1.2%

31,150



FY2024 YTD

70% of FY2019

Total Pacific Visitors in Guam
FY2023 vs FY2024

VISITOR ARRIVALS



Month to Date October 1-18, 2024

Market	Total MTD 2019	Total MTD 2023	Total MTD 2024	% to LY
CNMI	925	486	599	23.3%
Palau	270	198	246	24.2%
FSM	669	463	496	7.1%
RMI	80	15	23	53.3%
Australia	76	40	22	-45.0%

VISITOR ARRIVALS



Calendar Year to Date 2024
January – October 18, 2024

Market	Total CYTD 2019	Total CYTD 2023	Total CYTD 2024	% to LY
CNMI	18,497	10,544	10,671	1.2%
Palau	3,413	2,167	2,923	34.9%
FSM	11,588	10,224	9,980	-2.4%
RMI	1,306	592	498	-15.9%
Australia	1,810	970	1,085	11.9%

FY2025 MARKETING PROJECTS



TRAVEL TRADE CO-OP

- Airline Co-op with United Airlines, regional carrier for Micronesia
- Co-op with leading travel wholesaler to promote diving and adventure travel

PR / ADVERTISEMENT

- Content Production
- OOH / Media Ads
- Media Tie-in Project

SNS / DIGITAL MEDIA

- MicronesiaTour.com
- Digital Media Buying

MARKET DEVELOPMENT

- Travel trade and consumer show participation
- Joint collaboration for regional tourism partners in international travel shows (DEMA, ADEX, PATA Travel Mart)

NEW MARKETS



2024 MARKETING HIGHLIGHTS



Singapore TA Fam Visit



Malaysia TA Fam Visit



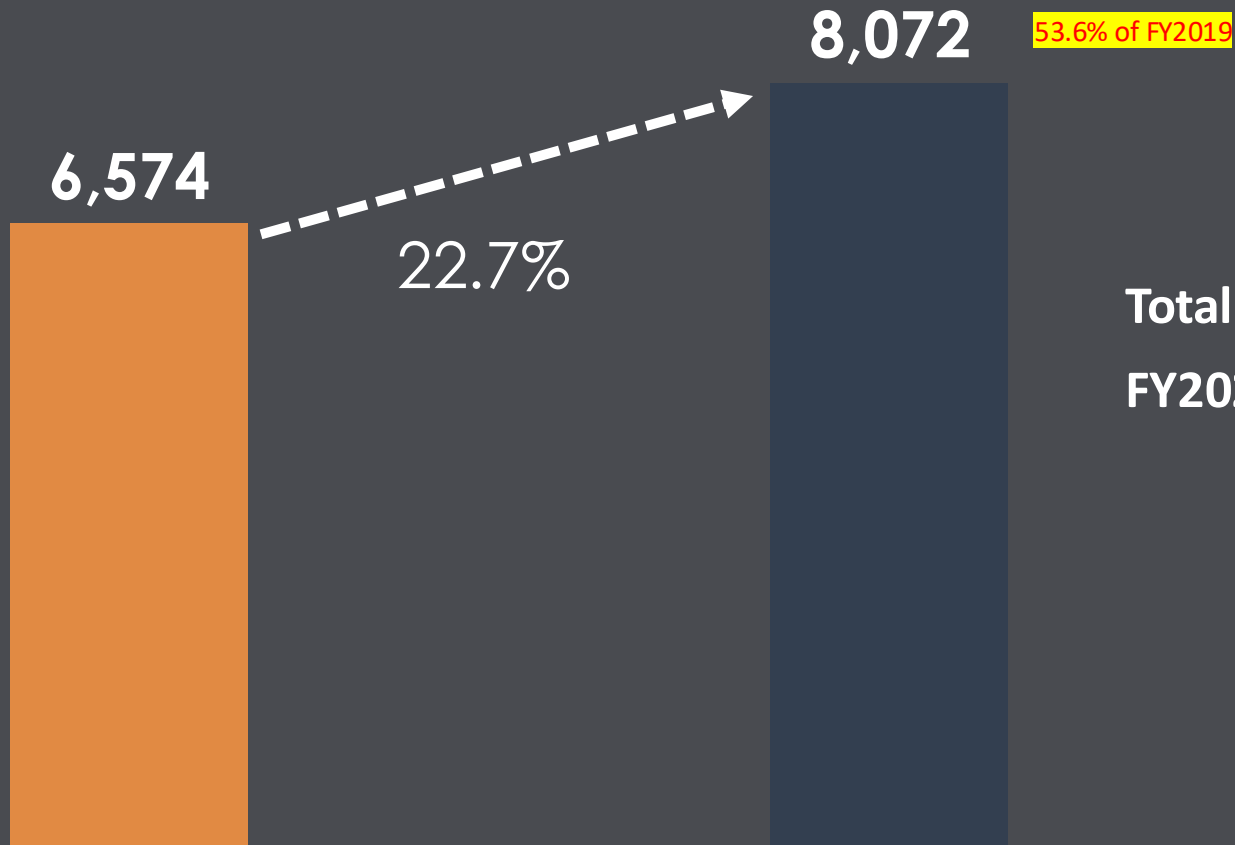
Asia Dive Expo



ITB Asia 2024

- GVB hosted travel agents from Singapore and Malaysia in an effort to expand Guam’s visitor profile and attract new market opportunities.
 - EU Holidays is one of the largest travel wholesaler in Singapore
 - Malaysia TA Fam Tour consisting of CEOs and Presidents of the top agencies
- GVB participated in several travel trade and consumer shows in 2024 to continue to promote Guam to new markets
 - Asia Dive Expo – largest dive show in Asia Pacific
 - ITB Asia 2024 & MICE Show Asia – premier B2B show attracting travel trade and media from around the world

WHERE WE WERE



Total New Market Visitors in Guam
FY2023 vs FY2024

FY2023 YTD

FY2024 YTD

VISITOR ARRIVALS



Visitor Arrivals as of October 1-18, 2024

Market	Total MTD 2019	Total MTD 2023	Total MTD 2024	% to LY
New Markets	354	297	279	-6.1%

Market	Total CYTD 2019	Total CYTD 2023	Total CYTD 2024	% to LY
New Markets	8,146	5,102	6,110	19.8%

FY2025 MARKETING PROJECTS



TRAVEL TRADE CO-OP

- Airline Co-op Promotions in Singapore and Malaysia
- Co-op with leading travel wholesaler to create Guam packages

PR / ADVERTISEMENT

- Content Production
- OOH / Media Ads
- Media Tie-in Project

SNS / DIGITAL MEDIA

- Influencer Co-op
- SNS Promotion & Campaign
- Digital Media Buying

FAM

- Familiarization Tours – Airlines, Travel Agencies, Media, Influencers, etc.

MARKET DEVELOPMENT

- Travel trade and consumer show participation
- Collaborate with trade partners to increase awareness of Guam
- Promote visa-free travel in Singapore and Malaysia