

# **Guam Tourism Situation Report**

## and Draft Short Term Recovery Plan

October 24, 2024

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## Introduction

This initial draft of the **Situation Report & Short-Term Tactical Plan** was prepared by private sector tourism executives as a starting point to address Guam's need for a focused recovery strategy.

The plan emphasizes Japan and Korea, which accounted for 88% of arrivals in 2019. While Taiwan and other markets are important and must also be pursued, Japan and Korea offer the fastest path to recovery and should be prioritized.

This plan focuses on immediate tactical actions, with a long-term strategic plan to follow promptly in order to align short-term efforts with long-term branding objectives.

Feedback from GVB and tourism leaders is needed within 30 days to ensure rapid implementation.

Guam has weathered a "perfect storm" of challenges that severely impacted tourism. Recovery will require urgent action and close collaboration between GVB, the private sector, policymakers, and the public sector.

We thank Governor Lou Leon Guerrero for her leadership and the GVB team for their efforts in stabilizing the sector. Together, we can restore Guam's position as a premier destination and achieve long-term economic growth.

## Executive Summary

Guam's tourism industry faces an unprecedented crisis, with key challenges compounding over the past four years, including extended pandemic closures, Typhoon Mawar, and a strong U.S. dollar, making Guam very expensive for key source markets.

Despite the global recovery of the travel industry, Guam has lagged behind, with visitor arrivals from Japan and Korea still far below pre-pandemic levels. The loss of major retail outlets, reduced flights, and widespread business closures continue to strain the remaining businesses and threaten long-term economic stability.

## Key Challenges

- **Increased Competition:** Regional destinations like Thailand, Vietnam, and the Philippines have surged in popularity. Japan has become a top destination for Korean travelers, while Korea is popular with Japanese tourists. In contrast, Guam's tourism offerings are old, tired and outdated. Domestic travel incentives during the pandemic also redirected demand, further diminishing Guam's appeal.
- **Air Service Decline:** Reduced flights from Korea and Japan, a global aircraft shortage, limited seat availability and increased airfare constrain recovery.
- **Economic Pressures:** Global hotel rates are up 30%, but Guam's rates have remained flat in USD. Rising airport fees further reduce competitiveness.
- **Market Share Loss:** Korea has nearly recovered to 2019 outbound levels, and Japan is on track to follow. However, Guam's market share has dropped by half, with arrivals stuck at less than 50% of pre-pandemic levels. Japan's weak yen has further compounded Guam's slow recovery, making it one of the few global destinations yet to recover from the pandemic.

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## Strategic Goals for 2025-2027

To reclaim its position as a premier destination, Guam must prioritize market share recovery in Japan and Korea while also examining new markets. Key initiatives include:

1. **Airline Incentives:** Implement landing fee reductions, route support, and cooperative marketing with carriers.
2. **Targeted Marketing Campaigns:** Launch premium and value campaigns to appeal to both high-spending and cost-conscious travelers.
3. **Signature Events:** Develop new events, such as an EDM water festival, and enhance existing festivals to attract diverse audiences and reduce seasonality.
4. **Capital Improvements:** Focus on product upgrades, transportation improvements, and encourage private-sector reinvestment through incentives.

## Economic Impact and Investment

In 2019, tourism comprised 60% of Guam's economy, generating \$2.4 billion in economic impact, \$250 million in taxes, and supporting 21,000 jobs.

Achieving recovery goals is expected to generate over \$1 billion in *incremental* economic impact annually, along with \$150 million in *additional* tax revenue, reducing reliance on federal assistance: this will be increasingly important in future years as the military buildup subsidizes. A \$50 million investment over two years—\$32 million in year one and \$18 million in year two—is needed to stabilize tourism. Unlike most government investment, full return on this investment will occur within 12 to 18 months through GRT and HOT increases, and benefits compounding into long-term growth and prosperity.

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## Path to Recovery

Success will require a unified approach led by GVB, with oversight from the Board and support from the government. Transparent communication, SMART goals, and collaboration among all stakeholders are essential. Immediate actions are required to restore air service, improve product offerings, execute targeted marketing centered on Guam's unique experiences, and implement data-driven strategies to monitor progress.

## Next Steps

1. **Establish a Recovery Committee** to integrate and align plans.
2. **Negotiate incentives with Korean low-cost carriers (LCCs)** to restore seat capacity. High goal: 75,000 monthly seats (currently 35,000; down from 95,000 in Jan 2020 and 54,000 in January 2024). Minimum goal: 55,000 monthly seats.
3. **Develop new marketing plans** and launch signature events.
4. **Improve airport arrival experiences**, product and transportation.
5. **Create a long-term strategic plan**, including capital investments.
6. **Update and leverage data** through visitor surveys and real-time tracking tools.

## Conclusion

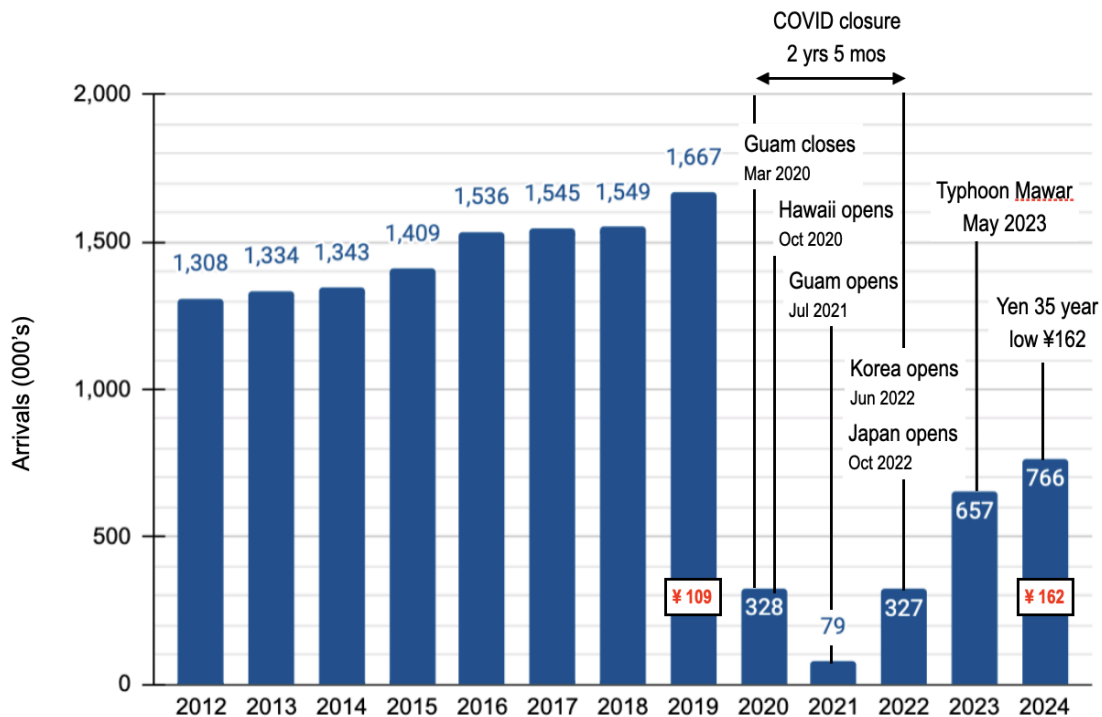
With support of the Governor and the Guam Legislature, active oversight by the Board, and diligent actions by GVB management, Guam has the opportunity to not only rebuild but to emerge stronger as "**Guam 2.0**"—a revitalized destination offering transformative experiences and sustainable growth into the future.

## Part I - Background & Current Situation

In 2019, Guam welcomed 1.63 million visitors, with 88% arriving from Korea and Japan. Tourism comprised 60% of Guam's economy, generating **\$2.4 billion in economic impact**, **\$250 million in taxes**, and supporting **21,000 jobs**<sup>1</sup> — until the pandemic.

While Hawaii lifted its travel restrictions after 7 months, Guam's restrictions remained in place for 16 months. However, reopening earlier would not have significantly altered the outcome. By the time Japan and Korea fully lifted their travel restrictions in late 2022, Guam had been closed for 2.5 years and other destinations were already rebounding.

Then, just as Guam tourism finally restarted, Typhoon Mawar hit, stalling recovery. Adding to the challenges, the Japanese yen fell to a 35-year low in April 2024.



<sup>1</sup> Tourism Economics: 2019 Guam Economic Impact Assessment

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## The Reality: A Critical Juncture

The financial benefit from the military buildup has masked Guam’s tourism crisis, leaving many outside the industry unaware of its severity. After four years without significant arrivals, numerous businesses have closed, and thousands of jobs have been lost.



**Tumon Sands Plaza** is 100% vacant, with **Chanel** and the **Louis Vuitton Global Store** (one of only 13 in the world) gone for good. **Hotels** are closing or shifting to military use, and key attractions like **Atlantis submarine** and **Ride the Ducks** have shut down.

This creates a **downward spiral**: closures make the destination less attractive, leading to fewer arrivals and then further closures. Tourists complain, *“Everything is closed, and Guam is expensive.”*

Asia Pacific was the slowest region to recover but even this region has recovered to 92% of pre-pandemic levels—except Guam.

Korea is nearly back to 2019 outbound levels, with 2025 expected to exceed 2019, yet Guam arrivals are down 50%. Japan is at 60% of 2019 levels but Guam is at 30% for Japan. **Guam’s recovery is among the slowest globally.**

Market	Outbound % Recovery	Guam Arrivals % Recovery	Market Share Change	% Variance in Market Share
Japan	60-70%	30%	3.4% → 1.4%	-59%
Korea	95-100%	50%	2.6% → 1.3%	-50%



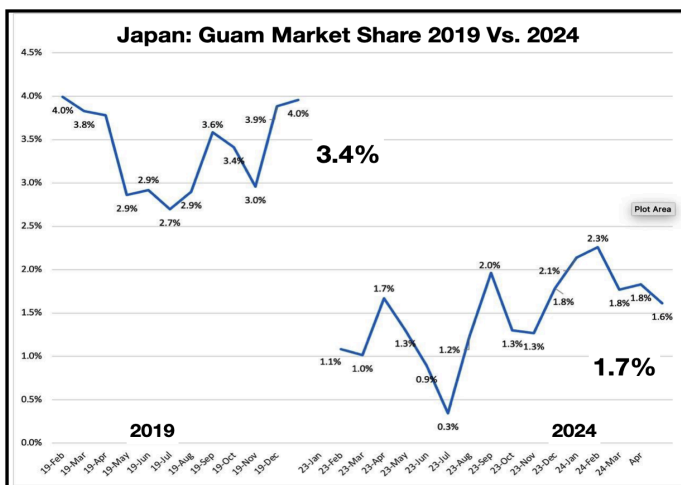
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**Guam's Japan recovery is the worst in the world**

## JAPAN OUTBOUND, GUAM ARRIVALS & MARKET SHARE

GLOBAL JAPANESE DESTINATION SORTED BY MARKET SHARE GAINS/LOSSES VS. 2019				
	MARKET SHARE			
	2019	2023	Variance	
Turkey	0.5%	0.8%	59%	Winners
Korea	16.3%	24.1%	48%	
Vietnam *RF	4.7%	6.1%	28%	
Australia	2.5%	3.1%	25%	
New Zealand	0.5%	0.5%	11%	
Singapore	4.4%	4.5%	2%	
Canada	1.3%	1.2%	-4%	
Spain	3.3%	3.2%	-5%	
N. Mariana	0.1%	0.1%	-5%	
Switzerland	1.1%	1.0%	-6%	
Philippines	3.4%	3.2%	-7%	
Bali(Indonesia)	1.3%	1.2%	-7%	
Thailand	9.0%	8.4%	-7%	
Germany	3.1%	2.8%	-8%	
Taiwan	10.8%	9.6%	-11%	
Cambodia *R	1.0%	0.9%	-13%	
U.S.A	18.7%	15.8%	-16%	
Hawaii	7.9%	6.0%	-24%	
Hong Kong	5.4%	3.6%	-33%	
Austria	1.3%	0.8%	-38%	
Slovenia	0.2%	0.1%	-42%	
Macao	1.5%	0.8%	-47%	
Croatia	0.7%	0.4%	-50%	
<b>Guam</b>	<b>3.4%</b>	<b>1.4%</b>	<b>-59%</b>	

		Outbound	Guam	Market Share
<b>2019</b>	Jan	1,452,157	58,021	4.0%
	Feb	1,534,792	58,774	3.8%
	Mar	1,929,915	72,974	3.8%
	Apr	1,666,546	47,725	2.9%
	May	1,437,929	41,989	2.9%
	Jun	1,520,993	41,027	2.7%
	Jul	1,659,166	48,103	2.9%
	Aug	2,109,568	75,630	3.6%
	Sep	1,751,477	59,758	3.4%
	Oct	1,663,474	49,218	3.0%
	Nov	1,642,333	63,789	3.9%
	Dec	1,712,319	67,794	4.0%
<b>2020</b>	Jan	1,380,762	61,088	4.4%
	Feb	1,316,820	60,918	4.6%
<b>2023</b>	Jan	443,105	4,806	1.1%
	Feb	537,705	5,459	1.0%
	Mar	694,292	11,583	1.7%
	Apr	560,183	7,304	1.3%
	May	675,661	6,011	0.9%
	Jun	703,259	2,434	0.3%
	Jul	891,615	10,989	1.2%
	Aug	1,200,930	23,560	2.0%
	Sep	1,004,730	13,079	1.3%
	Oct	937,715	11,893	1.3%
	Nov	1,027,110	18,342	1.8%
	Dec	947,911	20,299	2.1%
<b>2024</b>	Jan	838,581	18,955	2.3%
	Feb	978,884	17,343	1.8%
	Mar	1,219,789	22,343	1.8%
	Apr	888,767	14,326	1.6%
	May	941,709	12,034	1.3%
	Jun	930,229	11,245	1.2%
	Jul	1,048,823	15,160	1.4%



Average 2019-20 pre-COVID 3.6%  
 Average 2023-24 post-COVID 1.4%  
 Variance 2024 Vs. pre-COVID -59%

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## Factors Affecting Arrivals

Factors Affecting Guam Arrivals	Details / Notes
Low-cost regional competition	Thailand, Philippines, Vietnam
Both countries' domestic travel	Including Okinawa, Japan, and Jeju, Korea. Japan provided free travel vouchers.
Recovering outbound	Japan: 20M in 2019, 14.5M in 2024, 16M forecasted for 2025. Korea: Close to 2019 levels, expected to exceed in 2025.
Strong USD	Impact mostly felt in Japan; Korean won down only 13-15% vs. 2019.
Departure of travel agents, rise of FITs	Particularly noticeable in Japan.
Lack of flights	Korea impacted by cost-prohibitive landing fees, operating costs, fuel tax, etc.

## Air Service

Since 2019, global airfares are up 30-40% <sup>2</sup> and 44% regionally,<sup>3</sup> driven by aircraft shortages, reduced competition and higher operating costs, but fares from Japan to Guam show a 3% **decline** in USD (2019 vs. 2024) while Korea-Guam fares have risen sharply. Prices in yen and won are higher due to currency fluctuations, and Japan's load factors remain are below 40% – an unsustainable level that risks further flight reductions.

Country	Seats 2019	Seats 2023	Seats 2024	Arrivals 2019	Arrivals 2023	Arrivals 2024	Load Factor 2019	Load Factor 2023	Load Factor 2024
Japan	875,084	387,176	529,101	683,777	133,640	192,036	78.1%	34.5%	36.3%
Korea	885,045	504,477	464,029	753,366	374,242	375,000	85.1%	74.2%	80.8%

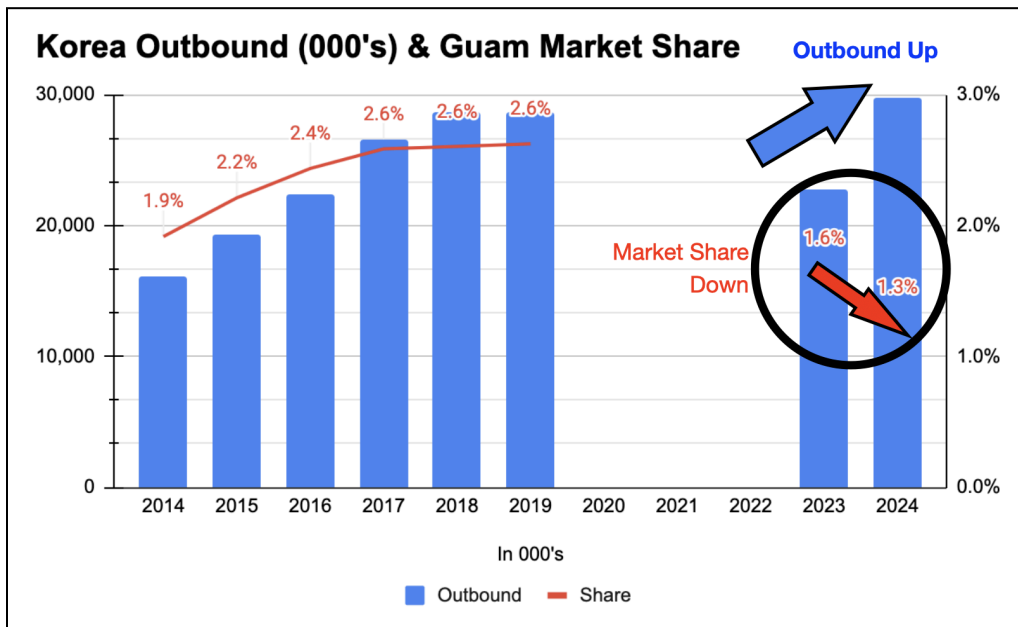
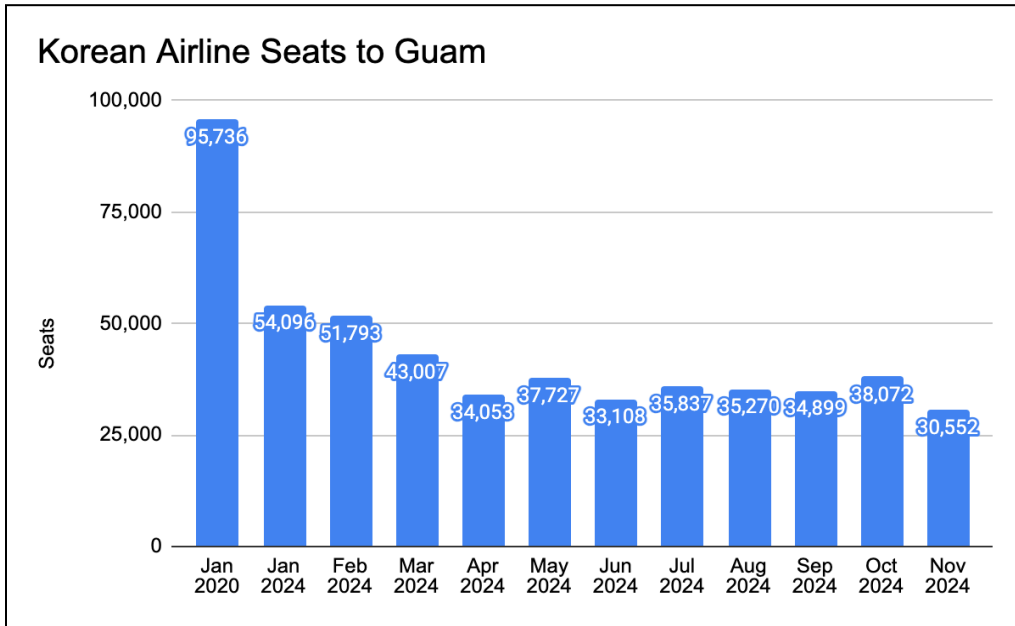
<sup>2</sup> <https://media.hopper.com/research/q2-consumer-travel-index>

<sup>3</sup> <https://www.foxbusiness.com/lifestyle/rising-costs-on-flights-when-book-what-expect>

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## Korea Seats into Guam

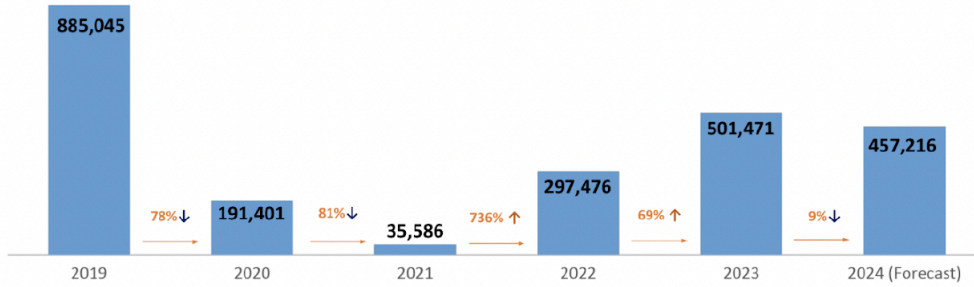
To attract flights, Guam must offer route incentives and reduced landing fees. There were 95,000 seats from Korea in Jan 2020, 54,000 in Jan 2023 and 35,000 now.



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## ◆ Korea-Guam Airline Seat Supply

\* Source: Korea Airlines



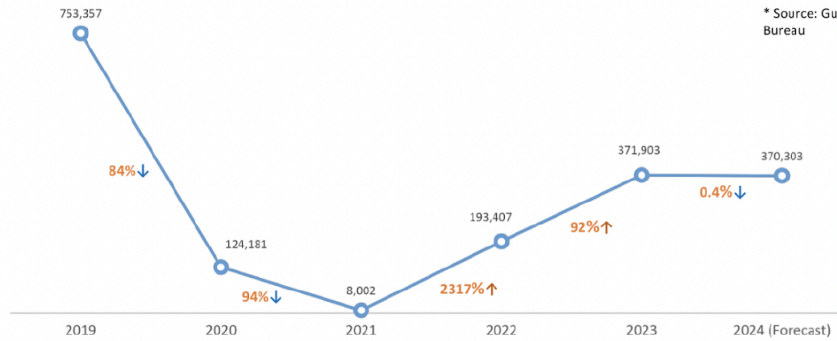
\* Unit : Seat

Airseat	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	Var.LY
2019	76,555	70,543	70,678	67,914	69,231	67,509	74,334	74,523	73,008	81,589	74,310	84,651	885,045	2%
2020	94,736	75,569	16,589			458	647	567	567	567	756	945	191,401	-78%
2021	756	756	945	756	756	945	1,134	3,810	4,857	5,094	6,176	9,601	35,586	-81%
2022	6,378	2,908	3,366	6,341	17,894	25,430	39,632	44,393	32,531	38,486	37,266	42,851	297,476	736%
2023	46,446	43,722	52,178	48,966	41,781	12,579	37,820	44,084	42,640	44,675	40,947	45,633	501,471	69%
2024	54,096	51,415	43,196	34,053	37,727	33,108	35,837	35,270	35,088	37,931	28,572	30,923	457,216	-9%

\* Forecasted number in blue

## ◆ Korean Guam Arrival

\* Source: Guam Visitors Bureau



\* Unit : Pax

Arrival	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL	Var.
2019	69,295	59,429	54,087	54,161	58,276	62,413	67,866	65,333	61,412	67,124	62,448	71,513	753,357	1%
2020	78,609	40,022	5,160	6	4	5	77	95	46	37	39	81	124,181	-84%
2021	104	77	113	86	102	173	303	375	573	998	3,639	1,459	8,002	-94%
2022	924	311	760	3,239	9,947	16,298	28,063	24,751	18,065	29,045	25,754	36,250	193,407	2317%
2023	39,653	37,480	36,428	35,397	29,005	2,871	26,984	31,774	29,191	30,802	31,355	40,963	371,903	92%
2024	46,740	41,847	32,676	28,982	28,338	26,499	31,178	29,274	25,965	28,379	22,286	28,139	370,303	0%
VS. 2019	-43%	-37%	-33%	-35%	-50%	-95%	-60%	-51%	-52%	-54%	-50%	-43%	-51%	

\* Forecasted number in blue

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## Hotel Costs

Global hotel rates have risen 30% since 2019, driven by inflation, supply chain issues, and post-pandemic travel demand. In contrast, **Guam's hotel rates have *dropped* 3.2%**<sup>4</sup> in USD but remain high in yen.

	2019 ADR	2024 ADR	Variance
<b>USD</b>	\$216.00	\$209.00	-3.2%
<b>Yen</b>	¥23,525 (1 USD = ¥109.00)	¥31,821 (1 USD = ¥152.25)	+35.3%
<b>Won</b>	₩251,569 (1 USD = ₩1165.7)	₩283,162 (1 USD = ₩1354.84)	+12.6%

## Airport Costs

Airport operations costs and landing fees have risen sharply, from \$18.15 in 2019 to \$32.61 (+65% in USD, +235% in yen), with further increases expected in FY 2025.

## Hotel Occupancy Tax and Room Rates

Tourist Attraction Fund (TAF) collections from the Hotel Occupancy Tax are not down as much as arrivals (YTD -24%, forecast -31% vs. -60% for arrivals) due to extended stays by military and contractors (U.S. arrivals match 2019). **One contractor in a room for 21 days equals 14 tourists**, who average 2.3 guests per room for 3.5 nights.

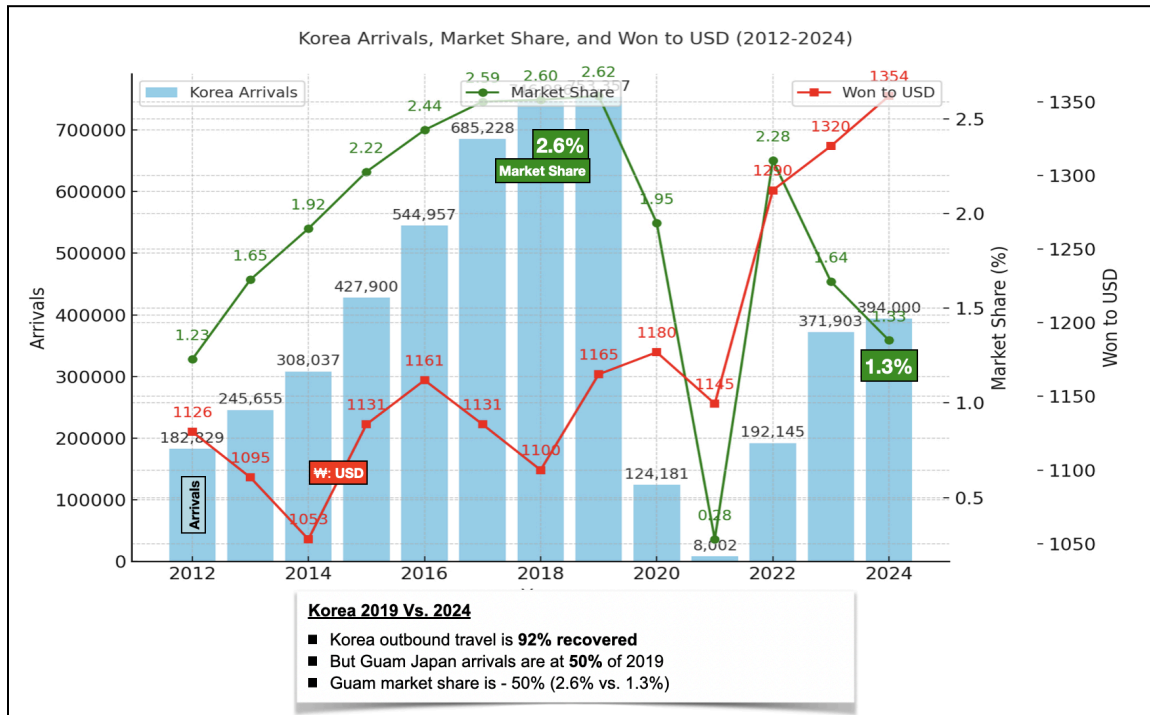
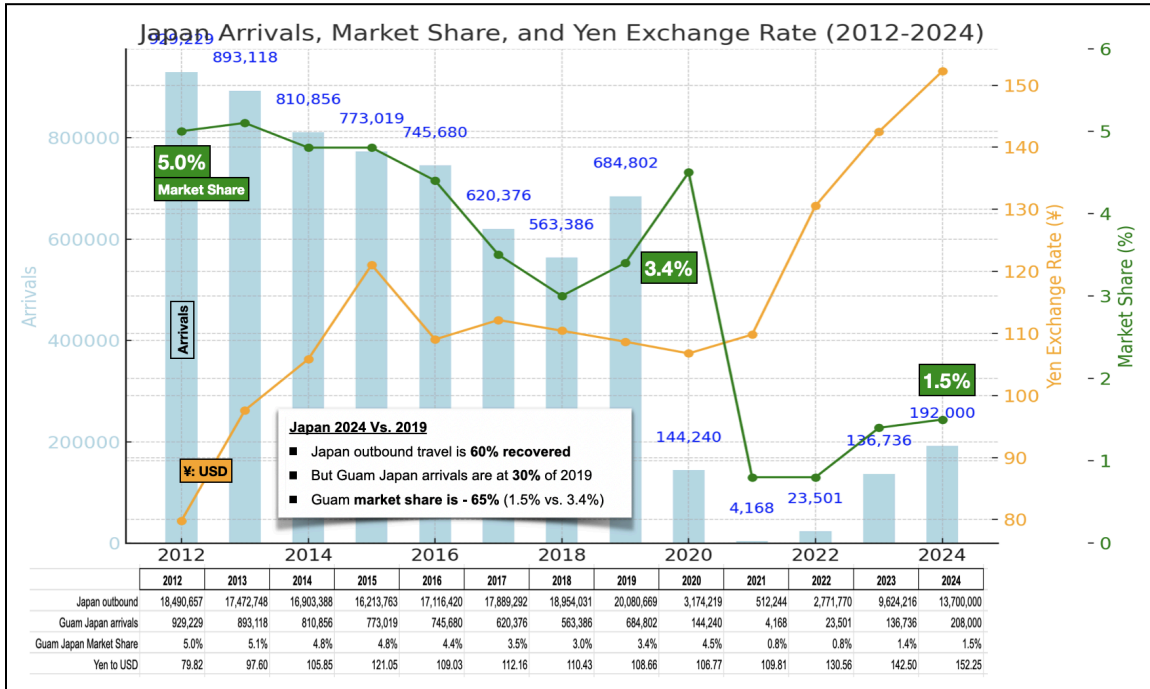
However, **TAF collections are not an indication of recovery**, as higher TAF revenues do not benefit tourism businesses like taxi drivers, attractions, and luxury retailers, which depend on tourist arrivals.

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<sup>4</sup> STR Reports (Sheraton, Hilton, Hyatt, Westin, Outrigger)

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## From Independent Tourism Consultants

- *"Global tourism has made a full recovery... while Guam is floundering...Guam's visitor sector is struggling... (and is) significantly behind the global curve."*
- *"Guam lags behind. With the window of opportunity for recovery rapidly closing, it is imperative for Guam to address (its) problems head-on."*
- *"In 2023, (global tourism) revenues were only 5% below pre-pandemic levels and are anticipated to grow... 50% in the next 10 years (but) Guam is still struggling to recover."*
- *"Guam faces a lack of a clear strategy and cohesive branding...A unified approach to branding is crucial ... but requires a significant investment...Without a well-defined strategy, efforts to revive the sector are scattered and uncoordinated, leading to inefficiencies and missed opportunities..."*
- *"A major challenge that Guam's tourism sector faces is the lack of a clear strategy and cohesive branding (and) uncoordinated efforts between public and private entities."*
- *"Guam's tourism sector as a whole does not currently harness the power of data, leading to inefficiencies in marketing. Guam's data sources are dated or have flaws..."*
- *"The Tourism 2020 strategies are well thought out... (It is) a well-designed roadmap for the island's tourism industry...If successfully implemented, Guam's Tourism 2020 Plan has the potential to transform the tourism industry on the island. (but) there have been no major expenditures in infrastructure (and) many of the objectives in this strategy were not achieved...This plan or any future plan related to Guam's tourism strategy will require support from stakeholders, including the government, to succeed."*

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From Tourism Economics (An Oxford Economics Company), October 15, 2024



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This brief letter outlines some of the key challenges and opportunities facing the Guam visitor economy. Tourism Economics has assessed the economic value of tourism for more than a decade, including its peak in 2019 when visitor activity generated \$2.4 billion in total economic output and \$253 million in taxes.

While the pandemic devastated many regional economies, Guam has been the slowest to recover in the region. International visits to Guam remain about half of pre-pandemic levels while we expect Asia Pacific to achieve 92% of 2019 levels for the year 2024. Monthly data show Japan and Korean outbound travel to be rebuilding as the year progresses without any observable gains for Guam.

This is creating a downward spiral for the Guam visitor economy that will require interventions. The collapse in visitor activity has suppressed air service accessibility and is causing the failure of the attractions, experiences, and accommodations that underpin the industry. Action to support the visitor economy is especially vital because of its importance to the Guam economy. While military investments have supported certain sectors and public finances, this does not trickle down to the thousands of affected households who depend on visitor activity. Further, the benefits of military investment cannot be assumed as perpetual.

On the positive side, Guam is positioned to restore its fortunes through focused investments in marketing, air service, event development, and targeted capital investments. We have witnessed the positive economic returns of these tactics in various destinations facing similar challenges. Further, the growth in Asian Pacific middle class households is forecast to continue over the coming decade, creating a wave of new demand that can further drive recovery and new heights for the Guam visitor economy.

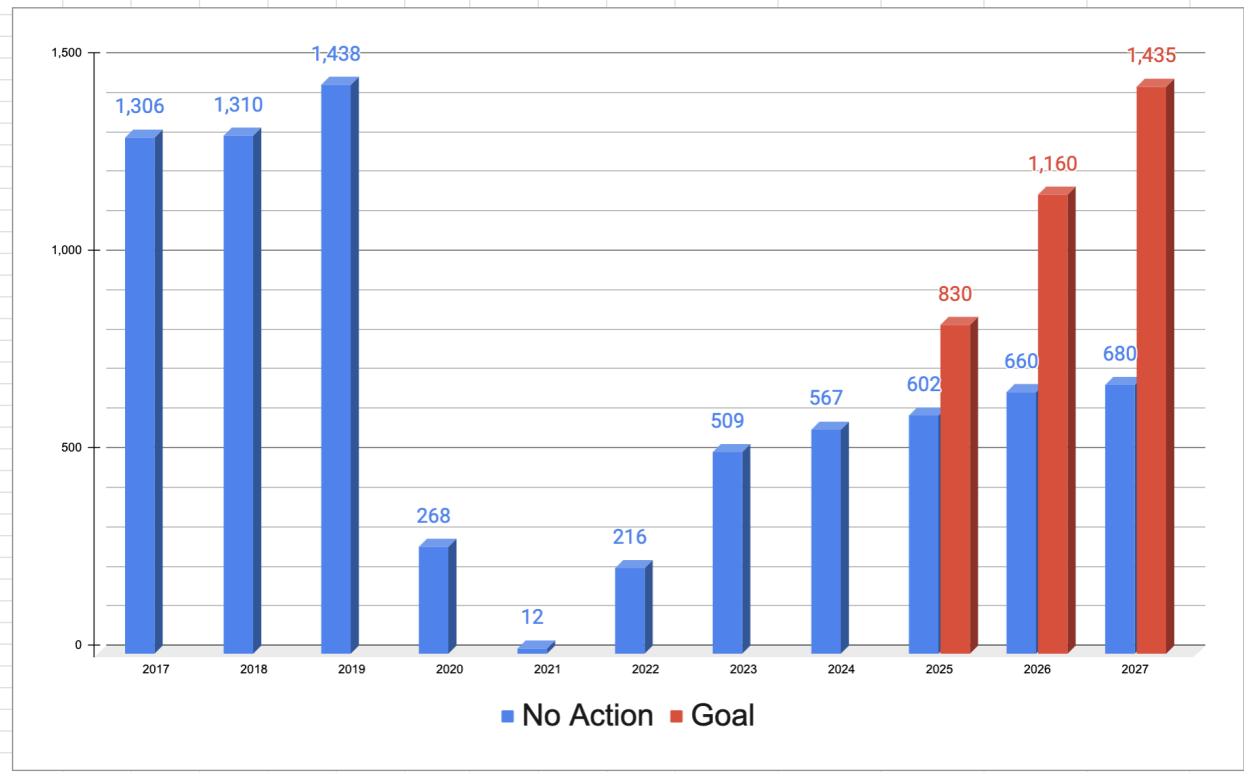
Sincerely,

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President | Tourism Economics  
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## Part II - Where We Should Be (2025-27)

000's	2019	2024	2025 if no action	2026 if no action	2027 if no action	2025 Goal	2026 Goal	2027 Goal
<b>Japan</b>	685	192	208	260	260	290	500	685
<b>Korea</b>	750	375	394	400	420	540	660	750
<b>Total</b>	<b>1,435</b>	<b>567</b>	<b>602</b>	<b>660</b>	<b>680</b>	<b>830</b>	<b>1,160</b>	<b>1,435</b>
<b>Vs. 2019</b>		<b>-60%</b>	<b>-58%</b>	<b>-55%</b>	<b>-55%</b>	<b>-42%</b>	<b>-20%</b>	<b>-</b>
<b>Japan share</b>	3.4%	1.3%	1.3%	1.3%	1.3%	1.8%	2.5%	3.4%
<b>Korea share</b>	2.6%	1.3%	1.3%	1.3%	1.3%	1.8%	2.2%	2.6%



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## Arrivals Forecasts Without Intervention – and Reporting

Without decisive intervention, there is little reason to expect meaningful growth in Guam's market share or visitor arrivals. The current situation is at risk of being seen as "the new normal." We must stop presenting performance against prior years or COVID periods, as these comparisons create a misleading perception of progress. The truth is that Guam remains at only half of its previous arrivals, making it one of the few destinations worldwide still struggling to recover. We started recovery efforts too late, and it is imperative that we now act with urgency and focus. The fair benchmark is our market share of current outbound – this is what should be tracked and regularly reported.

## Korea

Korea's outbound travel in 2025 will exceed 2019 levels. Guam should be seeing similar arrivals (750,000), but currently has only 394,000—about half.

Guam's Korea market share has dropped from 2.6% in 2019 to 1.3%, despite the won being only 13-15% lower than 2019. **The primary issue is limited flights which constrain arrivals and keep fares high.** Without intervention, market share will remain at or below 1.3%, with arrivals stuck below 400,000.

Low-cost carriers (LCCs) Jin Air, Jeju, and T'way have expressed interest in possibly adding flights with incentives which are now common globally due to aircraft shortages.

Guam had 90,000 seats per month in 2019, but that number is down to 30,000. With incentives, 25,000 seats could be added, restoring the 55,000 seats reached in January 2024. This would yield around 560,000 arrivals at 85% load factors and a 1.8% market share—a realistic goal for 2025.

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## Japan

Japan's outbound travel reached 20 million in 2019 but is projected at 12 to 14 million (60-70% of 2019 levels) for 2024. In contrast, Guam's arrivals from Japan have dropped from 685,000 in 2019 to a forecast of 192,000 (30% of 2019). Guam's market share has declined from 3.4% to 1.3%, partly due to the weak yen.

Without intervention, Guam's share will remain between 1.3% and 1.5%, with only 200,000 arrivals in 2025 and 250,000 or fewer beyond 2026. However, targeted marketing campaigns could increase Guam's share to 1.8% (290,000 arrivals) in 2025, with potential for 500,000 by 2026. A yen recovery would accelerate these results, though Guam cannot rely on this happening.

## Other Markets

Taiwan will soon reinstate flights temporarily, presenting strong potential that should be actively pursued to ensure that these flights continue. The Philippines visa waiver also offers great promise. Additionally, former markets like Hong Kong, Russia, Australia, and new markets such as Singapore should be explored.

However, Step 1 requires a laser focus on reclaiming lost market share in Japan by leveraging underutilized airlift and in Korea, where existing service can be expanded. Reopening new markets should follow as Step 2, as they will not yield immediate results.

## Part III - How We Reach Our Goals

Turning Guam's tourism around will require:

- **Transparency:** Publicly communicate the industry's precarious state
  - **Strong Leadership:** Focused execution led by GVB and its board
  - **SMART Goals:** Clear, actionable objectives for management action
  - **Investment:** Substantial financial backing
  - **Collaboration:** Unified effort from GVB management, board, and industry leaders
- 

The path forward begins with publicly acknowledging the situation and validating assumptions through source market research. Key initiatives include:

- **Airline Incentives:** Route support, cooperative marketing, reduced landing fees.
- **Targeted Marketing:** Large-scale campaigns with expert guidance.
- **Signature Events:** Use events to attract visitors and promote Guam.
- **Capital Improvements:** Reinvest through tax incentives

Some initiatives, such as adding Korea flights, will yield immediate results, while others, like brand repositioning, will take time. Guam anticipates 2025 as a rebuilding year, with significant progress by 2026 and full recovery to 2019 levels by 2027. However, without decisive action, Guam risks remaining at 50% of 2019 arrivals, leading to further business closures and a downward spiral of fewer arrivals and economic decline.

A \$50 million investment over two years is needed—\$32 million in year 1 and \$18 million in year 2. However, with limited immediate funding, GVB can allocate the full \$14 million from its reserves and \$7 million from TAF surplus for 2025. Additional support will be needed including increased TAF allocations for 2026 and beyond.

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## 1. Airline Incentives

Incentives are essential to attract and retain air service in today's competitive market.

Key strategies include:

- **Operating Cost Incentives:** Temporary reductions or waivers of landing fees to prevent Guam from being priced out against low-cost destinations like Vietnam, Thailand, and the Philippines. While Guam won't match their low rates, it must remain competitive.
  - **Revenue Guarantees:** Providing minimum revenue guarantees (MRGs) to reduce airlines' financial risks when adding new routes.
  - **Cooperative Marketing Support:** Partnering with airlines on joint marketing campaigns to promote and sustain new routes.
- 

### 1. Operating Cost Initiatives: Guam Airport Fees

Reducing landing fees is essential to boost Guam's competitiveness. The airport's Air Service Development Incentive Plan (ASDIP) can support new routes, while GVB funds can offer targeted incentives to increase service frequency.

#### Guam Landing Fees (cost per enplanement)

	2019	2024	Variance
USD	\$ 18.15	\$ 30.61	68.5%
Yen <sup>5</sup>	¥ 1,978 1 USD = ¥109.00	¥ 4,660 1 USD = ¥152.25	235.6%
Won	₩ 21,157 1 USD = ₩1165.7	₩ 41,476 1 USD = ₩1354.84	196.0%

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<sup>5</sup> Yen and Won at FX rate per IRS

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## 2. Minimum Revenue Guarantees (MRGs)

Restoring seat capacity is critical to market recovery and reducing airfares through increased competition.

Limited flights from Seoul have driven high load factors and elevated fares. Adding flights benefits tourism but poses risks for airlines. For example, increasing from one flight at 90% capacity to two flights with a 33% rise in sales may drop both to unprofitable 60% load factors.

**Globally, MRGs mitigate airline risks** by reducing financial exposure. Incentives can be fixed payments per flight or guarantees to purchase empty seats if load factor thresholds aren't met, with the latter preferred as no payout occurs if targets are reached but less likely given the global aircraft shortage.

Korean airlines can operate four daily Tokyo flights with the same aircraft that services Guam once daily, limiting Guam's competitiveness. Expanding capacity could lower fares, benefiting consumers but challenging airlines.

Fares have risen as competition dwindled, with Guam's seat count falling from 95,000 in January 2020 to 54,000 in January 2024 to 30,000 today. Jin Air, Jeju, and T'way have expressed interest in adding flights if incentives are offered.

**These incentives could include per-flight fees, seat purchases if thresholds aren't met, or pre-purchased seat blocks** for resale or use by media and influencers. These can be paired with reduced landing fees through the Guam airport (GIAA's) Air Service Development Incentive Plan (ASDIP).

In addition, **cooperative marketing** is essential to not just add seats but to develop sustainable routes.

### **3. Marketing Co-op and Market Support**

Neither airlines nor destinations typically depend on incentives beyond 12-24 months, as LCCs often shift routes based on profitability. To ensure sustainable service, GVB should offer marketing co-ops to support promotional efforts. These co-ops help launch new routes, raise awareness, and build demand for long-term stability. Airlines' own marketing channels can also complement GVB initiatives.

#### **Taiwan and Other Markets**

With China Airlines launching service from Taiwan, targeted marketing is needed to support the route. As updated branding is finalized, coop marketing can also be pursued in the Philippines and elsewhere as well.

#### **United Airlines**

United Airlines provides 90% of Guam's airlift from Japan, operating routes even at unprofitable load factors. Their commitment is greatly appreciated and vital to our recovery. Increasing demand through support via cooperative marketing is essential to keep these routes viable. Current load factors are unsustainable, and once aircraft are reassigned to other destinations, it becomes extremely difficult to restore them. Ensuring strong collaboration and prioritizing support for United Airlines must be one of our top priorities to maintain and grow air service capacity.

#### **Japan LCCs and Other Carriers**

Attracting Japanese LCCs will take time. In the meantime, Korean LCCs operating through Japan can expand airlift and this should be explored while remaining mindful that full service carriers such as UA, JL and KE make long term commitments to the destination and ensure sustained growth. Both are needed.

## 2. Targeted Marketing

### Marketing Advisor: Expert Assistance Needed

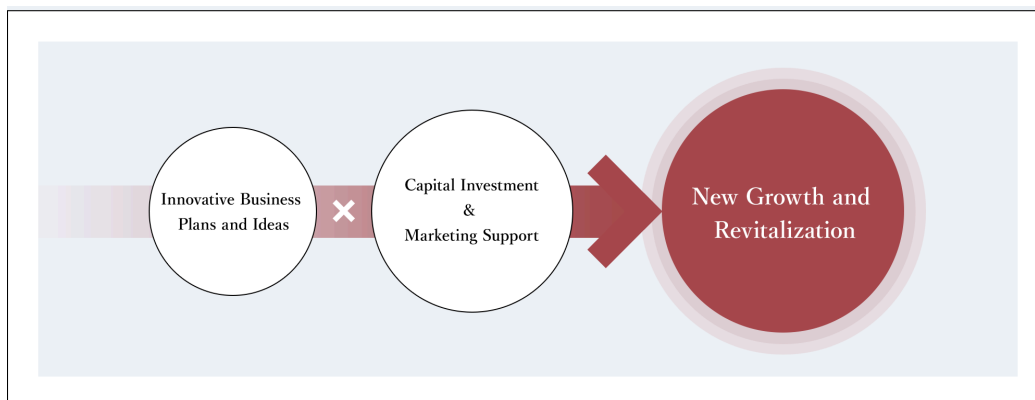
Guam requires expert guidance and fresh strategies for recovery. JTB has a division that specializes in domestic turnarounds and could offer valuable insights. A promising option is **Katana**, led by Mr. Morioka, which focuses on business revitalization. Katana deploys top marketers to address both immediate challenges and ensure sustainable growth by transferring advanced marketing expertise to clients.



From Katana's website:

*"We dispatch professionals from various fields to support long-term development, not only addressing immediate issues but also equipping clients with advanced marketing knowledge to ensure sustainable growth."*

Partnering with firms like Katana will help Guam discover innovative solutions for both short-term recovery and lasting success.





## Introduction: The Role of USPs in Rebuilding Guam's Tourism

Unique Selling Points (USPs) are essential in differentiating a destination from competitors, offering travelers distinct reasons to visit. In an increasingly competitive tourism landscape, a clear understanding and promotion of these unique attributes is crucial to stand out. Guam's recovery efforts should focus on three core USPs:

1. **Chamorro Culture** – Guam's indigenous heritage offers rich traditions, stories, and practices that cannot be replicated elsewhere. Chamorro culture adds authenticity to the visitor experience and provides a meaningful connection for tourists seeking more than a typical beach vacation.
2. **America in Asia** – As a U.S. territory, Guam offers visitors a unique blend of a taste of America with an Asian influence, a combination not available in other destinations within the region. This dual identity appeals to travelers and families who value both familiar services and the intrigue of cross-cultural experiences “beyond Asia” – without the need for a long-haul flight.
3. **Diverse Attractions and Experiences** – Beyond its beaches, Guam boasts a wide variety of truly unique **experiences**, including adventure tourism, water sports, shopping, and cultural festivals. And offerings such as Kâraera and Zoh are on par with the highest quality offerings anywhere. This diverse offering allows Guam to cater to a range of travelers, from families to adventure seekers.

Promoting these USPs will help Guam position itself not just as a beautiful island destination, but as one with authentic, immersive, and multi-faceted experiences. **USPs should provide the foundation for Guam's marketing efforts**, creating a distinct brand identity that appeals to modern travelers seeking more meaningful journeys.

# Guam Tourism Situation Report & Short Term Tactical Plan

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## **Culture – Longer Term branding considerations**

For over 50 years, Guam has showcased its culture through trade shows, posters, and brochures. However, these traditional efforts have not fully unlocked its potential to attract visitors. Currently, only about 2% of tourists engage with key cultural sites, such as the Guam Museum, underscoring the need for a modern, impactful strategy.

To resonate with modern travelers, Guam must shift towards dynamic, immersive experiences. Working with expert marketing firms like Katana can help shape campaigns that resonate with contemporary travelers by focusing on **emotional engagement** and **hands-on interaction**. This aligns with global tourism trends that **emphasize authentic, experiential travel**.

A new approach should closely integrate village experiences, collaborations with local artisans, and opportunities for tourists to engage in cultural activities firsthand. By embedding cultural elements throughout the visitor experience, Guam can offer more than just a destination—it can deliver a personal connection to the island's identity. This strategy not only enriches the tourist experience but also ensures that tourism benefits extend across the entire island.

Visual storytelling will be key to this refreshed approach. Rather than relying solely on images of traditional performances, **campaigns should feature visitors actively engaging with Guam's culture**—learning, participating, and creating memorable experiences. This narrative positions Guam as more than a beach destination; it becomes a place of personal discovery, where travelers gain a deeper understanding of a rich, living culture.

Promoting Guam's cultural identity in this way ensures that the island remains distinctive and relevant in a rapidly changing tourism landscape, ultimately driving long-term visitor growth and economic sustainability.

## Specific Marketing Tactics

### 1. Premium Guam

Promote Guam's premium offerings to enhance its image and attract higher-spending travelers whose travel decisions are less impacted by a weak yen. A major marketing and PR event featuring A-list celebrities and influencers could showcase Guam's top-tier experiences.

### 2. Focus on Guam's Unique Attractions (USPs) - Experiences

To align with global travel trends, tourist attractions should be repositioned and no longer referred to as "optional tours" (a reference from a bygone era) but rather as "**experiences**," offering visitors authentic, immersive opportunities to engage with the island's unique heritage and landscape.

This shift emphasizes Guam's distinct blend of cultural, natural, and recreational offerings. From cultural festivals and historical sites to outdoor adventures like scuba diving and hiking, promoting these experiences as essential elements of Guam's identity will enhance its appeal and better connect with evolving traveler expectations. **Guam has a unique and tremendous collection of experiences – promote them!**

- Adventure: Hiking, Skydiving, SCUBA
- Cultural: Valley of the Latte, Chamorro Village, Guam Museum
- Shopping: DFS, GPO, Micronesian Mall, Plaza Shops, Donki
- Fun: Water parks, Tagoda amusement center, Guam Aquarium
- Evening: Stargazing, numerous Shows, Zoh nightclub, Dinner Cruise
- Ocean: Fish Eye, Dolphin watching, Marine sports, Snorkeling, Fishing
- Dining: Fine dining, casual, beachfront, Chamorro, Asian, American

### 3. Value Guam

Collaborate with hotels, restaurants, retailers, and attractions to offer **value-added incentives like upgrades and giveaways**, avoiding discounts that erode profits. Examples include “stay four nights and get a fifth night free” and show seating upgrades. Integrate sweepstakes to boost engagement

**VALUE GUAM, THE GREAT GUAM GIVEAWAY**  
\$5 MILLION IN CONTRIBUTIONS: UPGRADES, ETC. FULL PARTICIPATION (HOTELS, AIRLINES, ATTRACTIONS, DINING)  
MARKET HEAVILY: INFLUENCERS, BLOGGERS, TRADITIONAL AND ONLINE MEDIA. LEVERAGE PREMIUM GUAM MEDIA

The infographic features a central graphic of a target with a red arrow hitting the bullseye. To the left of the target is a red arrow pointing upwards labeled 'HIGH VALUE'. Below the target is a red arrow pointing to the right labeled 'HIGH QUALITY'. To the right of the target is a 2x2 grid of icons and text:

 Upgrades (seat upgrades, etc.)	 Bonus (4 <sup>th</sup> Night Free, \$100 spa with min F&B spend)	 Value Added (Free Gift with Purchase)	 Limit to Quality Tours and Products
 Run for Specific Time (Sept 1 to Dec 15)	 Market and Promote Aggressively	 One Lucky Winner Wins a Guam VIP Luxury Package	

### 4. Location Subsidies and Earned Media Opportunities

Attract media through financial incentives for production companies and resolve visa challenges with a streamlined program, like Hawaii’s Hawaii International Film Association (HIFA) special visa pilot. Guam has missed critical media opportunities due to stricter visa enforcement for Japanese and Korean crews. Correcting this issue is essential to reestablish Guam as a media-friendly destination and increase global visibility through earned media.

## 5. Travel Coupons and Group Coupons

Japanese consumers favor travel coupons, but limiting them to in-destination use reduces impact. Consider offering coupons via OTAs, agencies, and hotels to boost demand. Couple these with **Value Guam** promotion. Align group travel coupons with Japan travel initiatives. Provide subsidies for chartered buses to support large groups and organize large-scale familiarization trips for group organizers. Implement targeted solutions to address the bus driver shortage and ensure reliable transportation.

## 6. Top Influencer Engagement

Collaborate with leading influencers, vloggers, and YouTubers from Korea and Japan to create authentic content. This strategy will appeal to younger FIT travelers and position Guam as a desirable, accessible destination.

## 7. Digital and FITs

Focus digital campaigns on Free Independent Travelers (FITs) from South Korea and Japan, leveraging influencers and targeted ads for greater reach and engagement.

## 8. Market-Specific Niche Strategies

**Japan:** Target niches such as seniors, families, young adults, women and even those with disabilities. Provide subsidized familiarization trips for MICE groups and key sectors.

**Korea:** Leverage Son Heung-Min's popularity and the Premier League to attract sports enthusiasts.

## 9. Hawaii Comparison

Hawaii's success in Japan offers a valuable model. Comparing the budgets of Hawaii's and Guam's DMOs could guide more effective strategies.

## 10. Addressing Seasonality

Leverage Signature Events to in-fill during slower shoulder periods. Promote Guam's mild climate during winter months to attract sports tourists.

## 11. Branding

A strong, refreshed brand is essential for Guam's tourism recovery. Effective branding shapes visitor perceptions, drives engagement, and highlights Guam's **unique culture, unique experiences, and unique identity** as "America in Asia"—a safe, distinctive, and accessible getaway.

Amid the current crisis lies an opportunity to reposition Guam as "**GUAM 2.0**"—a revitalized destination offering distinctive experiences. This strategic rebranding can foster lasting, transformative growth, ensuring that Guam not only recovers but thrives for decades to come.

## 3. Events and Signature Events

Signature events are vital to reshaping Guam's image, helping transition from the "old Guam" to a modern, revitalized "**Guam 2.0.**" These events are essential to making the destination more vibrant and appealing to new audiences.

### Why Signature Events Matter

- **Reinvigorate the Destination:** Showcase Guam's unique attractions, culture, and experiences with fresh narratives.
- **Attract New Demographics:** Curated events draw niche travelers, influencers, and high-spending tourists, expanding Guam's appeal.
- **Combat Seasonality:** Boost off-peak travel, smoothing seasonal fluctuations and ensuring consistent visitor flow.
- **Media & Social Media Buzz:** High-profile events attract media attention and influencer coverage, amplified by targeted digital campaigns.
- **Promote Local Culture:** Events rooted in Chamorro heritage foster cultural awareness and authentic visitor experiences.
- **Economic Impact:** For example, Taylor Swift's concerts in Singapore generated \$300-400 million in economic impact, contributing 0.2% to GDP. Guam can achieve similar benefits, driving tourism revenue and sustainable growth.

## Event Examples

### **EDM Water Festival for Young Adults**

Inspired by events like S20 and Waterbomb in Korea, an EDM Water Festival in Guam would attract energetic, younger crowds from Korea and Japan. **Timed with school breaks, Guam could position itself as the “Spring Break” of Asia.**

These festivals feature top DJs, water-themed activities, and large-scale social media exposure, establishing Guam as a hotspot for dynamic, youth-driven events.

**Additional Benefits:** **1. F&B Booths.** Space for local vendors, spreading economic benefits to small businesses; **2. Viral Media Opportunities:** Promote Guam as a vibrant, exciting destination for young travelers through shareable content.





## ENHANCE AND ENLARGE EXISTING EVENTS

Guam should build upon existing events and enhance promotion to strengthen their impact. Adding elements like fireworks or cultural showcases can increase visibility and visitor engagement.

### Dance Festival ala Yosakoi.

Modeled after Yosakoi festivals in Hokkaido, Nagoya, and Kochi—where Nagoya alone attracts 1,000 participants and up to 2 million visitors—this festival could be tied to the existing Japanese Autumn Festival by the Japan Club of Guam.



**Guam Food & Cultural Festival.** Invite international chefs to highlight Guam’s culinary heritage and local ingredients. Connect the event with village festivities and enhance the **Agat Mango Festival** or create a new culinary event to celebrate Guam’s unique flavors.

**Guam Ko’ko Road Race, Ko’ko Kids Fun Run, half marathon and 10K race. Tour of Guam Cycling event. Inalahan Gadao Festival. Guam History and Chamorro Heritage Day. King’s World Tennis Tour. Guam Micronesia Island Fair.**



# Guam Tourism Situation Report & Short Term Tactical Plan

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## Examples of New or Reignited Events

1. **International BBQ Competition:** Showcase Guam's BBQ fame by inviting regional chefs for a cook-off.
2. **Summer Family Treasure Hunt:** Partner with local businesses for a summer-long hunt where participants collect points for a grand prize.
3. **Guam Premium Experiences Event:** A major media event leveraging Guam's top attractions.
4. **June LGBTQ 4-day Festival:** Celebrate diversity with a pride parade, festival, and block party.
5. **Regional MMA Event or Ironman:** Attract athletes and spectators from across the region.
6. **Fishing Derby:** Large tournament with prizes for different types of catches, including the largest fish.
7. **The Great Guam Race:** A regional adventure challenge similar to "Amazing Race," featuring physical and mental tasks.
8. **Concert with Well-Known Artists:** Offer Korean or Japanese fans a "fan trip" for a concert in a unique setting.
9. **Near Pin Golf contest:** Host a contest at Mangilao's 12th hole, with qualifiers at partner courses, and broadcast on regional ESPN. This will also help incentivize Mangilao to improve their course.
10. **Beach Volleyball Competition:** Invite Olympians and professional players to participate in a regional beach tournament.

## 4. Other Initiatives

- **Product Improvements**

Invest in upgrades to elevate Guam's tourism offerings and encourage reinvestment. Immediate efforts could include beautification initiatives like a "Waterblast and Paint Guam" week led by the Lt. Governor's office, with discounts from local paint stores to boost participation. These low cost visible improvements will enhance the visitor experience and signal a commitment to quality.

- **Groups**

Pursue **employee incentive trips** and **educational group travel**. Facilitate extensive **familiarization (fam) trips** for group organizers.

- **Transportation**

Enhance transportation options to improve the visitor experience. Subsidize or improve airport-to-hotel transport, provide free or subsidized shuttles for shopping districts, and direct routes to Chamorro Village. Explore on-demand ride services with virtual bus stops to offer flexibility and encourage visits to key attractions.

- **Data Driven Approach**

Adopting a data-driven strategy is essential for effective recovery. Data insights enable precise targeting and efficient marketing: Reinstate quarterly Visitor Exit Survey; conduct annual economic assessments to inform policy decisions; and explore partnerships with firms like Tourism Economics to use tools such as Symphony for real-time visitor tracking and spending analysis.

# Guam Tourism Situation Report & Short Term Tactical Plan

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- **Long-Term Strategic Plan**

While immediate recovery is critical, Guam's long-term sustainability requires a strategic response to its evolving market position. Collaboration among policymakers, small businesses, hotels, and cultural leaders is essential to align efforts.

## **Key Areas of Focus**

- **Rebrand and Improve Products:** As mentioned earlier, highlight Chamorro culture, unique and distinctive experiences (USPs), and Guam's identity as "America in Asia." Enhance offerings, improve transportation, provide free Wi-Fi, and invest in capital improvements to stay competitive.
- **Expand Markets:** Pursue a Philippine visa waiver while focusing on Japan and Korea. Reactivate key markets like Taiwan, Hong Kong, Russia, China, and Australia. Explore new markets, such as Singapore, as a gateway to Southeast Asia.
- **Make Data-Driven Decisions:** Use tools like Symphony by Tourism Economics to track visitor behavior and optimize strategies with real-time data. Reinstatement of Visitor Exit Surveys and conduct Tourism Economics assessments.
- **Refresh Tourism 2020:** Revise the Tourism 2020 plan. Ensure action-oriented implementation with measurable goals and stakeholder collaboration for accountability.

## 5. Capital Improvements

**Upgrading Guam’s aging tourism infrastructure is essential for recovery.**

Immediate priorities include improving the arrival experience and enhancing transportation to hotels.

Private-sector upgrades are also critical, but many businesses are struggling to survive and lack the resources for reinvestment. To encourage upgrades, targeted incentives—such as forgivable loans or zero-interest loans with deferred repayment—should be introduced.

A significant portion of the Tourist Attraction Fund (TAF) must be allocated annually toward continuous improvements. These efforts should align with a broader long-term strategic plan to ensure sustainable growth. As tourism struggles to recover, the TAF must return to its original purpose—supporting tourism and beautification—rather than funding government agencies.

A top priority is issuing a new HOT bond focused exclusively on revitalizing Tumon, the island’s primary tourist hub, which has seen minimal investment in almost three decades.

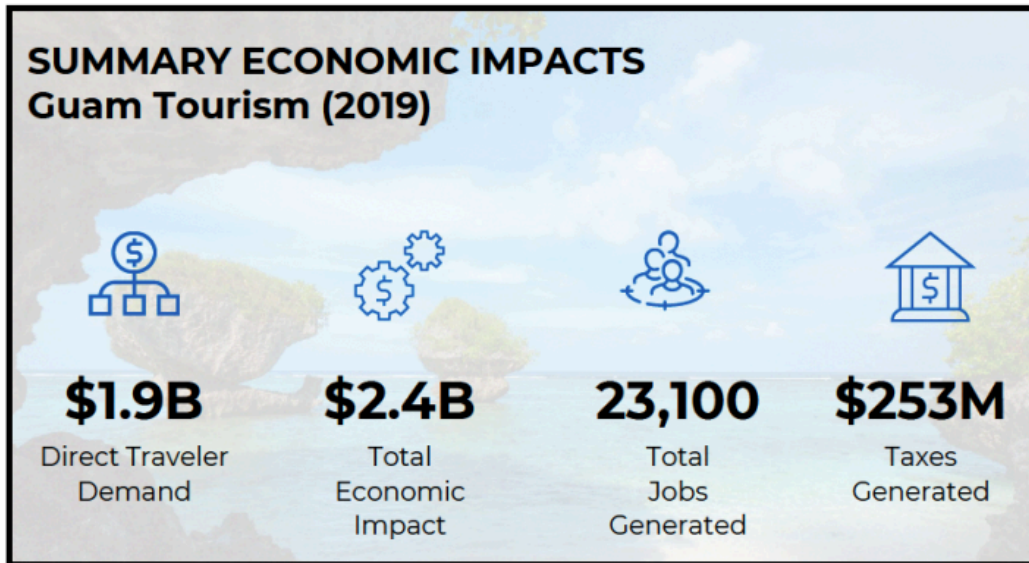
While improvements across the island are necessary, Tumon—where most visitors spend their time—must be restored to regain its appeal. Its current disrepair harms Guam’s image as a destination.

Previous HOT bonds were spread too thin, failing to resolve key issues like flooding. This new bond must focus solely on targeted upgrades to restore Guam and particularly Tumon as a vibrant and attractive destination.

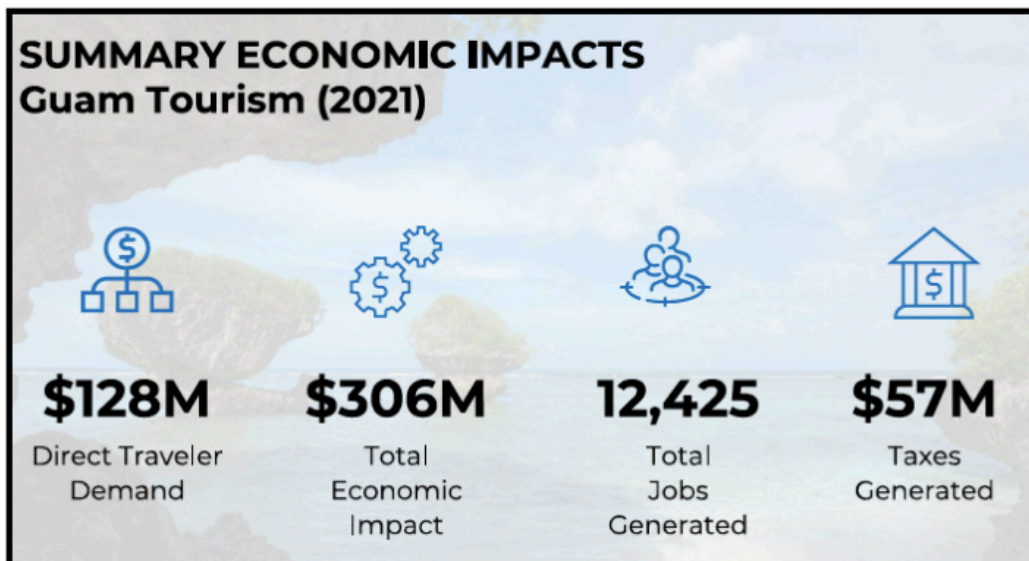
## Part IV - Economic Impact

Every dollar invested in tourism marketing yields a tenfold return. Each new air seat contributes about \$1,500 in economic impact per passenger. Restoring visitor numbers revitalizes local businesses, creates jobs, and ensures Guam’s long-term economic health. Strategic tourism investments generate ripple effects throughout the economy, driving sustainable growth and stability.

2019



2021



Source: Tourism Economics

2021 is the latest data

## \$1 Billion in Annual Impact

	AS IS (STATUS QUO)	GOAL	DIFFERENCE
<b>Market Share</b>	2025: 1.6% (1.7 JPN, 1.6 KOR) 2026: 1.6% (1.7 JPN, 1.6 KOR)	2025: 2.3% (2.7 JPN, 2.1 KOR) 2026: 2.9% (3.4 JPN, 2.6 KOR)	2025: .7% 2026: 1.3%
<i>Market Share Basis</i>	<i>Continuation of 2024</i>	<i>2025: Midpoint of 2019 and 2024 actual 2026: Same as 2019</i>	
<b>Arrivals</b>	2025: 700,000 2026: 800,000	2025: 990,000 2026: 1,450,000	2025: 300,000 2026: 650,000
<b>Tourist Spending</b>	2025: \$1.2 B 2026: \$1.4 B	2025: \$1.7 B 2026: \$2.5 B	<b>2025: \$.5 B</b> <b>2026: \$1.1 B</b>
<b>Economic Impact</b>	2025: \$1.7 B 2026: \$1.9 B	2025: \$2.3 B 2026: \$3.4 B	2025: \$.6 B 2026: \$1.5 B
<b>Taxes</b>	2025: \$177 M 2026: \$199 M	2025: \$246 M 2026: \$357 M	<b>2025: \$69 M</b> <b>2026: \$158 M</b>

**The difference in tourist spend between the status quo and realistic goal is \$500 Million in year 1 and \$1 Billion thereafter. The difference in taxes is \$69 Million in Year 1 and \$158 Million in year 2.**

\* - Tourist spending based on arrivals x average spend: GVB Exit Surveys. Economic Impact and Taxes are extrapolated using Tourism Economics 2019 Guam Report

The goals outlined here differ slightly from earlier market-specific targets, which focused only on Japan and Korea. Achieving recovery goals will result in over \$1 billion in incremental economic impact annually, with \$150 million in additional tax revenues.

The proposed \$50 million investment is expected to generate a full return within 12 months, after which the benefits will continue to compound, driving sustained revenue growth and long-term prosperity for Guam's economy.

## Conclusion

Guam's tourism industry is at an inflection point. While significant challenges remain, they also present opportunities for collaboration, innovation, and renewal. This recovery plan offers a structured framework to reclaim market share, revitalize the economy, and position Guam as a premier regional destination.

The plan serves as a foundation for collaboration between private sector experts and GVB leadership. However, successful execution is crucial. As external consultants noted about the Tourism 2020 plan, even the best strategies will fail without proper infrastructure investment and strong support.

Diligent execution by GVB management, with Board oversight, will ensure targets are met. SMART goals with clear timelines, as outlined in an example in the Appendix, will maintain accountability and deliver measurable progress.

With the **critical and appreciated support of the Governor and policymakers, active oversight by the Board**, and **diligent actions by management**, Guam can not only rebuild but emerge stronger, creating renewed prosperity and pride for the island.

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## Next Steps

1. **Recovery Committee** to review and combine plans
2. Negotiate **incentives with Korean LCCs** to regain seats (min 55k, target 75k)
3. Develop **New Marketing Plans** including events, etc.
4. **Product Improvement** (improved airport sense of arrival, transportation, etc.)
5. Create a **Long Term Strategic Plan** including **capital improvements**
6. Update and implement the strategic use of **data**



# Guam Tourism Situation Report & Short Term Tactical Plan

## Appendix

### Example Action Items (example)

The following are the highlighted action items contained throughout the document. A separate spreadsheet is available which includes comments and section references.

The below is illustrative only.

GUAM RECOVERY ACTION PLAN: TASKS		Responsible	By Nov 30	By Dec 31	By Jan 31	By Mar 30
			30 Day	60 Day	90 Day	Q1 2025
<b>1 Designate a Strategic Advisory Group</b>						
	Board to approve strategic advisory group	Board	X			
	Board or committee to meet weekly for review of SMART goals progress	Board	X	X	X	
<b>2 Funding</b>						
	Governor to make determination of ARPA funds or other funding	Governor	X			
	Legal counsel to consider how to utilize ARPA funds for foreign entities	Management	X			
	Complete paperwork needed to secure funding	Management		X		
<b>3 Research</b>						
	Meet Korean carriers and LCCs in Korea (Advisory group and GVB leaders)	SAG, Management	X			
	Meet Japan carriers and Korean LCCs in Japan (Advisory group and GVB leaders)	SAG, Management	X			
	Interview marketing companies (Advisory group and GVB leaders) to discuss the plan	SAG, Management	X			
	Finalize marketing company	Management, Board		X		
	Engage with PKF to align objectives	SAG, Management		X		
	Identify and engage consumer research company or align PKF work towards needs	SAG, Management		X		
	Conduct market research	Vendor		X	X	X
<b>4 Airline Incentives</b>						
	Meet GIAA (Advisory group and GVB leaders) to discuss and finalize incentives	SAG, Management	X			
	Finalize incentives for Board approval	Board	X			
	Aggressively pursue Taiwan and HKG carriers with incentives	Management	X			
	Present incentive package for new routes (lower fees, guarantees and marketing coop)	Management		X		
	Discuss and finalize marketing coop with existing carriers	Management		X		
	Finalize deals with carriers	Management, Board		X		
<b>5 Marketing</b>						
	Contract with designated marketing companies (Japan and Korea)	SAG, Management		X		
	Develop Marketing plan	Vendor, SAG, Management		X	X	
	Present Marketing plan	Board			X	
	Execute Marketing plan	Vendor, Management			X	X

# Guam Tourism Situation Report & Short Term Tactical Plan

## Action Items, page 2

		Responsible	By Nov 30 30 Day	By Dec 31 60 Day	By Jan 31 90 Day	By Mar 30 Q1 2025	
<b>6 Signature Events</b>							
	Develop list of events with budgets	SAG, Mgmt, Board		X			H
	Present to Board	Board		X			H
	Execute	Management			X	X	
<b>7 Wholesalers</b>							
	Develop fam trip agendas	SAG, Mgmt, Board	X				E
	Conduct extensive familiarization trips	Management		X	X	X	V
<b>8 Branding</b>							
	Interview branding companies	SAG, Mgmt, Board		X			H
	Present for approval	Board			X		H
	Develop a prelim feedback for modern, compelling brand	Vendor				X	H
<b>9 Capital Improvements</b>							
	Strategize methods to improve the arrival experience including airport transportation	SAG, Management	X	X			H
	Implement methods to improve the arrival experience including airport transportation	Management			X	X	H
	Strategize incentives for small businesses to reinvest (GRT, tax breaks , low interest loans)	SAG, Management	X	X			E
	Implement methods for small businesses to reinvest	Management			X	X	
	Set forth proposed short term capital improvements	SAG, Management		X			
	Execute short term capital improvements	Management, Board			X		H
	Strategize long term capital improvements	SAG, Mgmt, Board				X	
<b>10 Long Term Strategic Planning</b>							
	Meet with Stakeholders to gather input	SAG				X	H
	Draft long term plan	SAG				X	H
	Present to Management and Board	Management, Board				X	H
<b>11 Data Driven Initiatives</b>							
	Explore methods of data collection including Symphony	SAG, Management		X			H
	Engage solutions	Board			X		H
	Reinstate Visitor Exit Surveys	Management			X		H
	Reinstate the annual economic assessment	Management				X	H

# Guam Tourism Situation Report & Short Term Tactical Plan

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## Authorship

This document was created by a group of tourism executives with input from current and former GVB board members, organizations, businesses, and individuals with extensive tourism experience. It serves as a starting point for discussions between GVB and the private sector for further development.

Additional contributions are anticipated from various stakeholders, with the understanding that the short-term tactical recovery plan is highly time-sensitive.

Feedback from the following groups should be provided within 30 days to enable swift action.

### Primary

- Guam Visitors Bureau
- Executives from Guam's tourism industry

### Secondary

- Policymakers
- Guam International Airport Authority
- Guam Economic Development Authority
- Guam Hotel & Restaurant Association
- Japan Guam Travel Association
- Korea Guam Travel Association
- Japan Guam Hotel Association
- Guam Travel & Tourism Association
- Guam Chamber of Commerce
- Industry representatives
- Community representatives