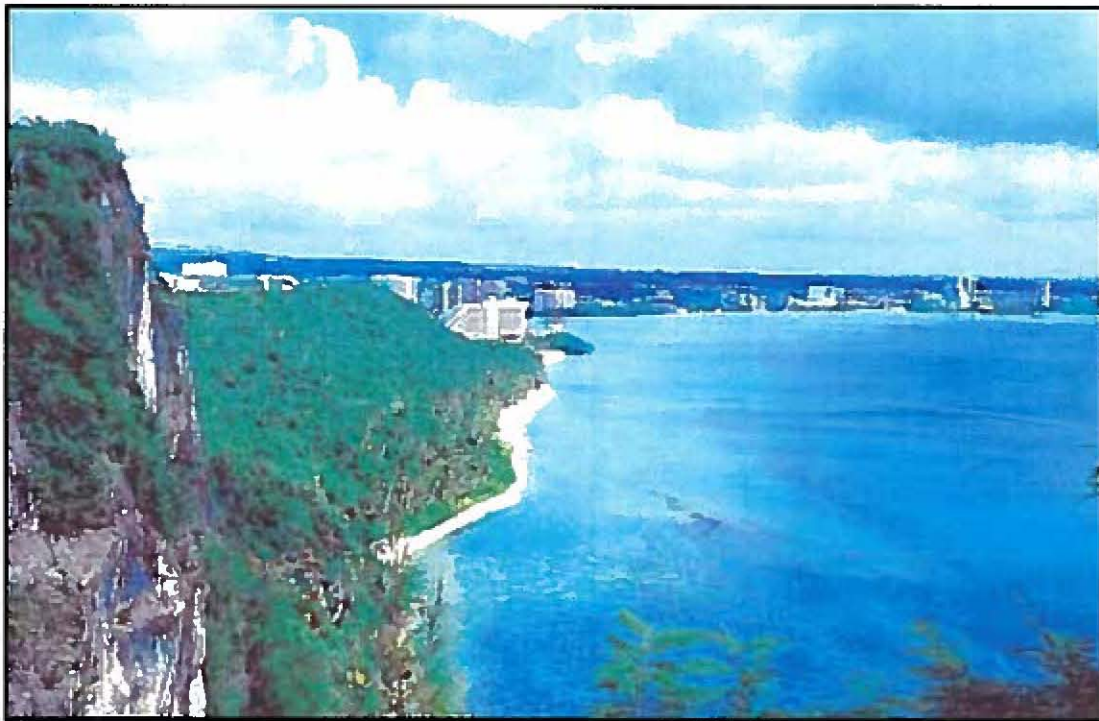




Guam Visitors Bureau
2005 Annual Report
with Highlights from FY2002-2004

GVB Annual Report FY2002-FY2005

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Vision Statement

Vision Statement

A healthy and vibrant visitor industry generating business opportunities and employment for all residents, protecting the island's heritage, cultural values and natural resources, and making a positive contribution to the community's quality of life.

Mission Statement

Mission Statement

To grow and diversify visitor arrivals by creating the reasons to visit, attracting visitors from various markets, and providing a destination experience second to none.

A Message from the Governor of Guam



Hafa Adai! In our campaign to "Welcome All Visitors Enthusiastically," we continue to transform our role in growing and diversifying the visitor and hospitality industry. Tourism's decline during the Asian Economic Crisis and through several local, national and world crises threatened our economic viability and challenged us to build a strong foundation for the industry. We ventured to create an apparatus that can sustain the impact of increased global competition, regional shifts and national security concerns.

We began this mission with an aggressive push to win back our largest markets and then venture into new markets. Partnering with local recreation facility-holders, we further diversified and created sports tourism as a market niche of the industry. We also worked with the aviation industry and the Airport to promote travel to Guam and change our notoriety as a close-by American territory to our distinction as a world-class destination.

We launched a major campaign to improve the Guam 'product' - the breathtaking beauty, enchanting culture and world-class hospitality. This marked a shift from Guam's traditional approach to enhancing the industry with a sole focus on overseas marketing.

We continue to clean and beautify the island, focus on cultural development and marketing, and promote activities that our vacationers are looking to do.

The result of our combined and strategic efforts with private sector partners and the Guam Hotel and Restaurant Association is telling. We have seen three consecutive years of visitor arrival growth, increased average visitor spending, a revitalized visitor district and a much stronger and diversified industry prepared to meet the demands of the new Century.

We will continue fostering the conditions for growth and vigor in the industry as we build an even stronger foundation for the island's economic engine. We welcome your interest in Guam and encourage you to experience all that our island has to offer and the reason our visitors keep coming back.

Thank you and may God bless you always!

Sinseru yan Magåhet,
FELIX P. CAMACHO
IMaga' lâhen Guåhan
Governor of Guam



A Message from the Chairman

Committee on Tourism, Maritime, Military and Veterans Affairs

Hafa Adai! I would like to commend the staff, management and board for your dedication to the Guam Visitors Bureau and commitment to growing our economy.

There are many challenges facing the visitor industry today. New markets are evolving within our region. Our competition is working hard to develop new attractions. Natural calamities and world events that occur in other parts of the world greatly impact our visitor markets. It

is through your creative minds and hard work that our visitor industry has continued to recover as well as develop. I am confident that you will continue to make every effort to increase visitor arrivals and expand our primary industry.

Both government and the private sector must join hands and work together to improve our product. We must work to clean up our island. We must refurbish properties. We must keep our streets safe for everyone to enjoy at all hours. We must make sure that our infrastructure is functioning properly. We must encourage investors and entrepreneurs to establish new and exciting products.

As your oversight chair, I have learned of the countless hours, the exhausting travel and the personal sacrifices many of you have made and continue to make in marketing Guam overseas. I worked with my legislative colleagues to repeal the prohibition of employment contracts that prevented the hiring of firms to promote Guam in Japan, exempted the GVB from the prohibition of purchasing alcoholic beverages with government funds and provided funding to repair the roadway through Pleasure Island on San Vitores Rd. Be assured that I am always ready to assist you in any way that I can.

I look forward to working with you as we strengthen our Japanese and Korean markets as well as diversify our visitor market.

Senseramente,

ANTONIO R. UNPINGCO
Senator



A Message from the Chairman



Hafa Adai: Guam's visitor industry and your Guam Visitors Bureau have come a long way since the tragedy of 9-11 and the ensuing calamities that shook the very foundation of our economy over the past five years. As a community, our metal was tested over and over again by world events that not only impacted Guam, but the entire travel and tourism industry.

There have been many lessons learned during those trying times, and I truly believe that Guam is better, leaner and stronger because of this. Our tourism arrivals have recovered

significantly and we hope to come closer to our goal of 1.5 million visitors by the year 2007.

Significant improvements continue to be made in product Guam, with many hoteliers, restaurateurs, retailers and optional tours re-investing and renewing their facilities. The Guam Visitors Bureau and the Government of Guam have allocated more money than ever before in its budget for beautification and the development of another signature attraction, the Guam Museum of History and Culture. Millions of dollars are now being invested in Guam's infrastructure to improve roads and utilities to solidify Guam's economic base.

As we move forward, the Guam Visitors Bureau will continue to aggressively promote Guam as a destination of value, shoring up our core markets of Japan and Korea, and expanding other markets to create greater diversification in our tourism base. We will also put an equal amount of energy and resources to improve the value of our destination.

I want to salute all the men and women in the hospitality industry who have struggled and survived during our most trying times in 2002 and 2003. It is the spirit of partnership and cooperation in our visitor industry that has brought us out of our darkest days, into the glimmer of renewed opportunity and prosperity that loom ahead.

We are not out of the woods yet, and there are other challenges we need to confront in the midst of our delicate recovery. I am confident, however, that with the community's support, Guam's visitor industry will continue to shine along with the quality of life for our people.

I thank you for your support in the past, I look forward to your continued support, and I am honored to continue serving our tourism industry at the Guam Visitors Bureau.

Si Yu'os Ma'ase,

DAVID B. TYDINGCO
Guam Visitors Bureau, Chairman



A Message from the General Manager

We're back! After a few years of not having a published arrival report, we are delighted to issue this FY2005 edition, which also include highlights of the interim years since the last publication in 2001.

We trust this report will provide useful information to our members, government policy makers, and others who appreciate the significance of tourism's contribution to our local economy and quality of life.

We also take this opportunity to thank those of you who have supported our work, through good times and bad, and especially all of you who have contributed "in-kind" goods and services, without which support the Bureau's work could not have been possible.

As we look toward 2006, it is fair to say that the Bureau can do much more to facilitate product and service improvements as we continue to diversify our visitors and market Guam aggressively.

Your Bureau is up to this task and will continue to work hard to earn your support.

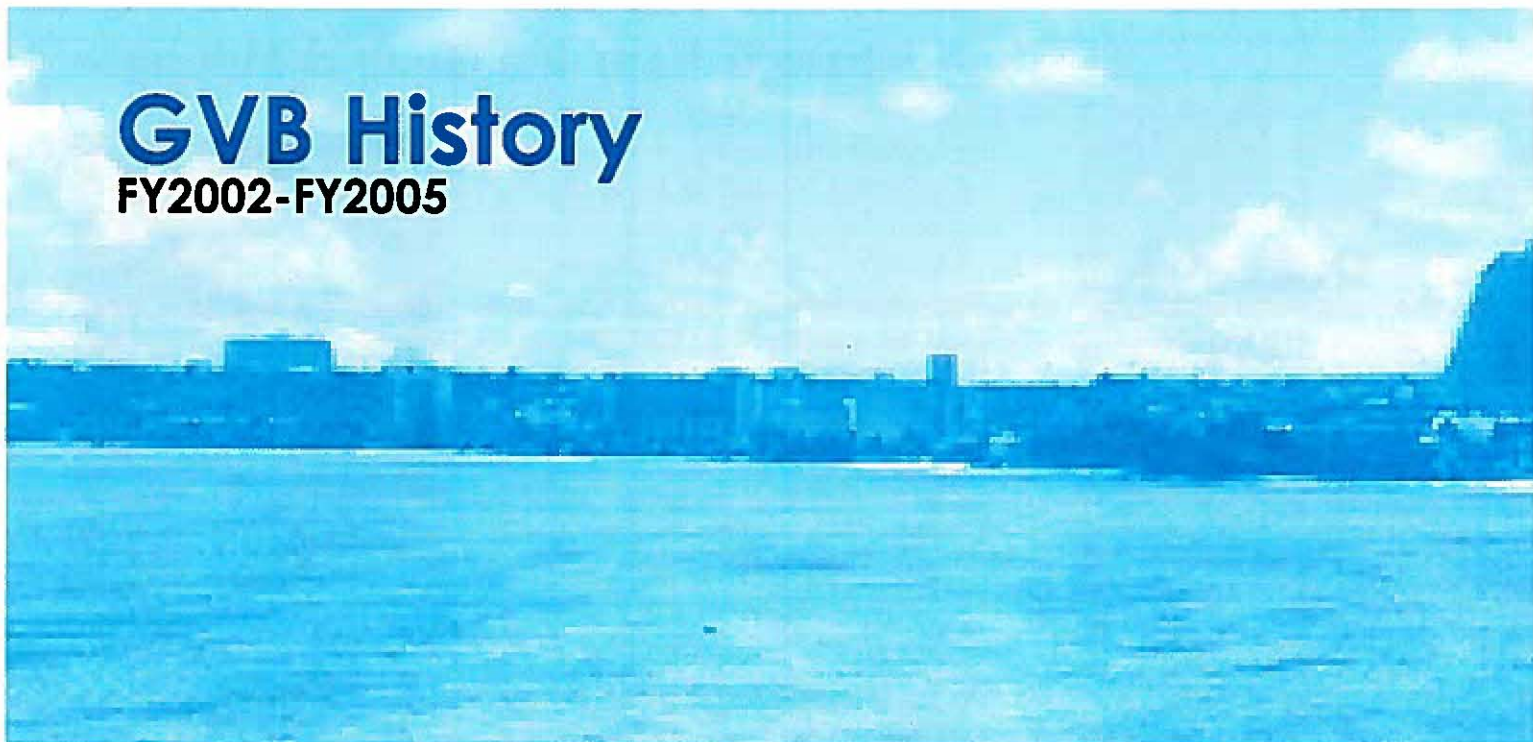


GERALD S.A. PEREZ

Guam Visitors Bureau, General Manager

GVB History

FY2002-FY2005



The beginning of Guam's tourism industry dates back to 1952, when Public Law 67 was signed by then Governor Carlton Skinner. The public law recognized the possibility of Guam becoming a tourist destination. Due to the fact that the island was under naval administration, there was a restriction on entering the island, making it difficult for tourists to come to Guam. In 1962, US President John F. Kennedy lifted the restriction, thereby allowing Guam to begin developing the island and the tourism industry. Shortly after the restriction ceased, Governor of Guam Manuel Guerrero created the Guam Tourist Commission by signing Executive Order 63-10. This agency was responsible for the promotion of Guam as a choice destination and was under the direction of the Guam Department of Commerce. With a small budget of \$15,000, Guam Tourist Commissioners began the work necessary to establish the island as a viable tourist destination, including enticing airlines to establish routes from Japan and other Asian destinations.

On May 1, 1967, the promotional efforts of

the Commission paid off when 109 Japanese visitors were welcomed to Guam. Flown in on Pan American Airways, these 109 visitors are considered Guam's first tourists and mark the beginning of the local industry's meteoric rise. Indeed, that year Guam welcomed approximately 6,000 visitors!

In 1970, the local government saw the need to change the responsibilities and structure of the Commission. Accordingly, Executive Order 70-24 established Guam Visitors Bureau as a public, non-profit membership corporation. The Guam Visitors Bureau Act (Public Law 17-32) provided the mandates and outlined the funding of the new Bureau's budget. The Tourist Attraction Fund (TAF), which was created by Public Law 17-65, provided 80% of the Bureau's funding. The remaining 20% would be provided through membership dues and in-kind collection. The TAF was created as separate from the General Fund and consisted of hotel occupancy taxes collected through every room night sold. The current occupancy tax rate is assessed at 11%.

As the marketing agency for the Government





of Guam, the Guam Visitors Bureau – commonly referred to as GVB – has the mission to promote Guam as a choice destination. While major marketing takes place in Asia and parts of the United States, on Guam the Bureau encourages infrastructure improvements and attraction and facility development. Guam also conducts public awareness and visitor satisfaction programs on island. In 1990, Public Law 20-205 was passed to establish a GVB Research Department. The law mandated the new section to collect, analyze and disseminate information about visitor arrivals and trends.

As tourism continues to be Guam's number one industry, many bills are introduced at the Legislature with the intent of providing further mandates for GVB and TAF. Some are signed into law. Others are deemed unrelated to the intent of the establishing legislation. In recent years, enabling legislation has granted the Bureau the flexibility to transfer funds among markets. After about four years of drafting and discussion, new legislation restricting and regulating the distribution of pamphlets and brochures in Tumon and other tourist attraction areas finally took affect in 2005.

In the last four years, Guam tourism has rallied back from several visitor gluts stemming from the post-9/11 War on Terror, the March 2003 invasion of Iraq, the SARS scare, economic recession, and several typhoons, including the cataclysmic Super Typhoon Pongsona, which severely

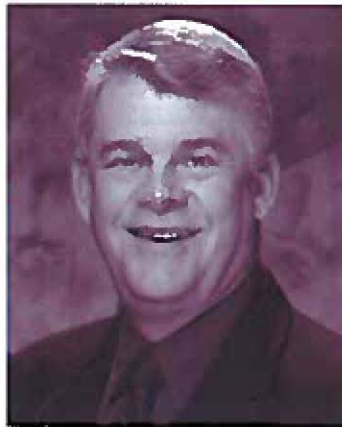
damaged hotels, visitor facilities, and infrastructure. But despite temporary setbacks and thanks to the local industry's uncanny ability to bounce back from worst-case scenarios, Guam is now entertaining record numbers of arrivals. And it only happened because the members of the industry immediately repaired the damage, quickly deployed travel missions, and nimbly implemented recovery campaigns touting the island's safety and viability even in the face of greatest doubt. Because of that refusal to give up hope, today Japanese arrivals are unprecedented and, among Korean arrivals, annual jumps of 10-and-13% are hop-scotching ever closer to the near-200,000 Korean visitors Guam reached in 1996.



GVB Board of Directors



DAVID B. TYDINGCO
Chairman
Governor Appointee



BRUCE KLOPPENBURG
Vice-Chairman
GVB Membership Elected



JOSEPH F. CAMACHO
Secretary / Treasurer
GVB Membership Elected

As mandated by Public Law 17-32 and outlined in the Bureau's by-laws, the Guam Visitors Bureau Board of Directors is tasked with the responsibility of approving Bureau activities and budgets as well as devising long- and short-term goals and objectives. On September 28, 1995, the Board adopted the mission statement: to promote and develop Guam as a safe and satisfying destination for visitors and to derive maximum benefits for the people of Guam. As such, the policies and procedures that the board members approve must always seek to achieve this very mission statement.

The diverse 13-member Board of Directors is made up of individuals involved directly or indirectly in the tourism industry. The Governor of Guam appoints five members to sit on the board. As outlined in the GVB by-laws, one of the governor-appointed members must be a representative from the Mayor's Council of Guam. Three board members are appointed by the Speaker of the Guam Legislature and serve on the Committee of Transportation, Tourism, and Economic Development. One of the three Speaker-appointed members is known as the alternate member. The alternate director has a term of two years and shall have no voting power unless and until a member of the Board is absent from a meeting. The alternate director shall replace the first absent director and can cast a vote if he/she makes up the required quorum of eight directors (GVB By-Laws, Article VI, Section 8).

The Bureau being a non-profit public corporation with membership privileges, the general membership elects four directors. The election takes place during an odd year, and the four top contenders become members of the Board. Those running for election must be members in

good standing, being actively involved in Guam's tourism industry. The elected members serve at the leisure of the Governor and/or Legislative Speaker.

After the January 2005 membership election, the Board held an organization meeting to elect officers of the Board as well as elected the 12th member. The 12th member is nominated by a board member and must receive a majority or at least eight (8) votes in order to get elected. The 12th member also serves a two-year term. Mr. Walter Dias was nominated and elected as the 12th member.

Also during the meeting, officers of the Board were elected: David B. Tydingco, Chairman; Bruce Kloppenburg, Vice Chairman; Joseph F. Camacho, Secretary/Treasurer. Members of the Board were also nominated and elected to serve as Chairmen for Standing Committees, which assist in directing GVB activities and programs. GVB Standing Committees include:

- Finance and Budget Committee
- Cultural and Heritage Committee
- Community Development Committee
- Tourism Industry Relations and Visitor Satisfaction Committee
- Tourist Attraction Fund Planning and Development Committee
- Research Committee
- Membership Committee
- Japan Marketing Committee
- Asia Marketing Committee
- Korea Marketing Committee
- North America / Pacific / Armed Forces Committee

GVB Board of Directors



CARL PETERSON
GVB Membership Elected



MANFRED PIEPER
GVB Membership Elected



MONTE MESA
Governor Appointee



JUDY FLORES
Governor Appointee



RICHARD LAI
Governor Appointee



WALTER DIAS
12th Member, Voted by the Board



**VICE MAYOR
ROBERT HOFFMAN**
Mayors Counsel Appointee



THOMAS J.M. CALVO
Legislative Appointee



LEE P. WEBBER
Legislative Appointee



JESSE A. LEON GUERRERO
Legislative Appointee-Alternate Member

Administration & Finance

FY2002-FY2005



Top (L-R) Emily Quinata, Miranda Munoz
Bottom (L-R) Juanita Aguon, Nonoy Solidum, Jean Taitano
Not shown: Jay San Nicolas and Rose Cunliffe



Deputy General Manager, Mary Torres

The Guam Visitors Bureau was formally created in July 1970 through Executive Order 70-24, with its predecessor, the Guam Tourism Commission, renamed and thus separated from the Department of Commerce, Government of Guam. In 1983, however, Public Law 17-32 reorganized the Bureau into a non-stock, non-profit membership corporation, to be governed in accordance with the applicable general corporation laws of the Territory of Guam.

The purpose of the Bureau is to promote the island's visitor industry in such manner it deems "most reasonably appropriate, including providing and disseminating information and materials promoting Guam as a visitor destination."

By law, the Bureau is mandated to promote and market destination Guam; promote local resident interest in the tourism industry; assist training and education efforts in tourism based employment and local entrepreneurial development; promote local culture and locally made items; encourage the development of tourist attractions and facilities; assist in enforcing tourism related laws and regulations; and gather, produce, and disseminate visitor industry data. The Bureau is governed by a Board of Directors comprised of thirteen (13) members and constituted as follows: 4 Appointees of the Governor, 4 Elected from the membership of private companies and individuals, 1 Representative of the Mayor's Council, 3 Appointees from the Legislature, one of whom serves as an alternate, 1 Selected by the eleven appointees and elected members. The Bureau's operation is funded primarily by the "Tourist Attraction Fund", as authorized in the annual government of Guam Executive Budget Act. The Bureau is also trustee for funds that are appropriated for various Tourist Attraction Fund (TAF) projects. Dues income from the Bureau's membership is a secondary source of revenue, but typically constitutes less than 1% of total income. Expenditures are authorized by the Board of

Directors. Island visitors reached a peak of 1,381,513 in calendar year 1997, followed by a sharp 21.5% drop in 1998 due to the 1997 KAL crash, the Asian currency crisis, and lingering Japan recession. By August 2001, however, the Bureau's various marketing initiatives began paying off and was tracking to match 1997 record arrivals when 9-11 struck and a prolonged slump ensued throughout the three year period ending FY2003. Following 9-11, an aggressive and tactical marketing strategy was initiated in Japan and Korea, Guam's two most important source markets comprising 88% of total arrivals in 2002. Progress was made toward recovery by the 2nd and 3rd Quarters of FY2002, but two devastating typhoons (July and December), the bombings in Bali and Indonesia were among global events that drove down arrivals dramatically. Visitor arrivals decreased from 1,048,813 in the recovering year of 2000 to 659,593 by calendar year end 2003, a whopping 37% contraction from Japan alone, and about 30% overall for all markets combined. This catastrophic drop in arrivals was also to affect the Bureau's ability to take counter measures because its primary funding source (TAF) plummeted 35% for the same calendar period from about \$20.6 million to \$13.3 million. This situation forced the Bureau to restrict, abandon or otherwise postpone planned marketing and destination improvement programs for the year, focusing much of the effort on market loss mitigation and maintenance of current capacity. Achieving these two

objectives was a challenge that the Legislature recognized and authorized the Bureau to secure a line of credit (P.L. 26-83) not to exceed \$6 million. The purpose of this funding was to pay for tactical marketing initiatives aimed at reversing negative arrivals. About \$5.3 million was earmarked for Japan to reinvigorate the incentive group market, sustain the positive growth of the wedding market, and reassure the family and OL market segments that Guam is a very safe destination. Because of timing and urgency, the Bureau launched these initiatives, which were to have been paid from the credit line authorized under P.L. 26-83. Unfortunately, this credit facility was never secured and the Bureau became indebted to its Japan advertising agency for about \$3.2 million, an amount that was to be repaid interest free by mutual understanding. The Bureau was not able to secure this credit facility because it was not able to commit first rights to TAF revenues that have already been pledged toward the repayment of bonds for the Tumon Redevelopment Project. Borrowing money from the Guam International Airport Authority was also explored, but did not materialize. Last year saw visitor arrivals on the rebound and a steady rise in TAF revenues, both of which were sustained throughout 2005. The 1,156,199 visitors who came to Guam in 2004 represented a 35% increases over the previous year, and is exceeded yet again in 2005 by another 5% growth to 1,210,147 visitors. TAF revenues last year were up 34% over 2003, and another 8% this year over last year.

Community Programs FY2002-FY2005



Top (L-R) Amy Pangelinan, Vanessa Simpliciano, Margaret Imaizumi
Bottom (L-R) Doris Ada, Freida Jose, Sonja Lujan-Sellers

The Community Programs department is comprised of four standing committees that focus on increasing the local community's awareness on tourism, culture and heritage, visitor safety and satisfaction in addition to special projects that endeavor to improve the tourism product.

Community Development Committee

FY2002-FY2005

The Community Development Committee (CDC) has the responsibility of providing activities that strive to promote tourism through education and awareness programs. Additionally, support through grants-in-aid is also granted through the CDC to qualified organizations and individuals that want to promote the island and/or the education of Guam's tourism industry.

In-line with the committee's goals and objectives to disburse grants-in-aid to assist in project implementation and completion, the following FY2003 grants were awarded: Topher Barretto – Japan Winter Season Jet Ski Races; Young Men's League of Guam – Gupot Chamorro; Tourism Awareness Group – 2nd Annual "Unify to Beautify 5K Walk/Run"; GEAR Sports Management – Gear IV; Marianas Professional Golfers' Association – Nation Cup Qualifying Event in Singapore; Municipality of Talofofo – San Miguel Fiesta; and Chamorro Village Friday Night Market – Friday night market advertising.

Highlights in 2004 were the Asian Pacific Children's Mission Project, Southern Comfort Ranch and Zoo Venture, Gef Pago Cultural Village, Tarza Waterpark, Underwater World, Fish Eye Marine Park, Jimmie Dee Productions and Guahan Resources Unlimited.

2005 welcomed the 1st Annual Kites for Wishes project wherein the sport of kite flying was introduced to Guam. The event took place on March 20th at the Asan Beach Park. Families got the chance to witness kite exhibitions by the President of the American Kite Association, Dave Gomberg and Ray Bethell, a multiple Kite World Champion. The proceeds of the event went to the Make-a-Wish Foundation, which in turn sponsored the Okada family from Japan to Guam.

Another successful project was the Malesso Fiestan Tasi. The annual cultural event showcases the Chamorro culture, traditions, arts and crafts, music and unique sports competitions. Here, local residents and visitors have the opportunity to interact and share cultural values through the various events. This taste of Southern Hospitality also boasts a different landscape from that of Tumon

and the northern areas. Fiestan Tasi also highlighted some of the village beauties and exhibited an assortment of water and land competitions.

Another continuing project is the Annual Asia Pacific Children's Convention (APCC). In 2005, a six-student delegation from Talofofo Elementary led by Ms. Barbara Tainatongo (Chaperon), flew to Fukuoka, Japan to attend the event. The APCC, a Non-Profit organization, aims to promote international cooperation between children so they will grow into adults with a strong sense of their identity as "Global Citizens". This year's theme was "We are the BRIDGE: We connect dreams around the world."

The APCC, founded in 1989 by the Fukuoka Junior Chamber, hosts children from more than 30 countries/regions throughout the Asian-Pacific area. This year, Fukuoka had invited 336 children from 46 different areas all over Asia. There were representatives from China, Hong Kong, Malaysia, Bangladesh, India, Nepal, Tahiti, Philippines, and the Maldives to name a few.

Other monies that were appropriated for 2005 went to various student-based organizations such as the Guam Visitors Industry Education Council (GVIEC) in support of their various school programs and island-wide beautification projects. Another grant recipient was the Guam Honor Band for the 16th Annual Australian International Music Festival. The festival afforded the band members the opportunity to participate in outstanding music education in the form of workshops from international clinicians and at the same time interact and work with peers from other countries. The band also represented Guam with concert performances at the major musical venues such as Sydney's world famous Opera House.



Cultural & Heritage Committee

FY2002-FY2005

The Cultural & Heritage Committee is the division that ensures that Guam's culture is represented in GVB's local and overseas promotions. The CHC provides support to marketing efforts by ensuring that the Guam cultural representation is accurate. Aside from overseas marketing representation, the committee is also supportive of on island projects that are coordinated by other organizations or government agencies. To this effect, the Board of Directors passed a policy that GVB work closely with the Department of Chamorro Affairs on all cultural promotions and activities.

The Bureau also awards qualified individuals, companies or organizations with grant money to help fund a cultural performance, project or literature. The committee reviews the objectives of the program to determine whether or not it will help the Bureau's objectives in promoting Guam's culture. The grants-in-aid program funded the 2005 Arts and Humanities

Month Celebration which raised the awareness for the arts, highlighted the culture, and showcased the talents and creativity of our performing, visual, folk and traditional artists. October marked the nationwide celebration of Arts and Humanities and CAHA as the local state arts agency spearheaded the local celebration, which activities included scheduled events and the major shopping centers. The culmination of the celebration was held at the Two Lovers Point from October 28-30th, 2005.

In working closely with the GVB's Marketing Department, the CHC organizes and supervises the cultural representation of Guam during overseas promotions. The Chamorro culture is portrayed through arts and crafts in the booth décor, through dancing and singing on the Guam stage, and having weavers or other artisans on-hand at the Guam booth. In Fiscal Years 2003-2005, the Bureau sent cultural delegations

to support marketing activities at the following trade shows: Korea Overseas Travel Fair, the Kashiwa Festival in Japan, Guam Live Presentations in various cities in Japan, International Travel Fair in Taipei, Taiwan, the International Tour Expo in Hong Kong, Hilton Food Festival in Tokyo and Osaka, Philippines Travel Tour Expo., Dance in Oceania, New Zealand and JATA.

Aside from dance and cultural performers, GVB also sends a Miss Guam to certain promotions to assist in promoting the island. Miss Guam's have been sent to the WEDDEX Spring and Autumn show in Korea, the Guam Live Presentations, various Tour Expos, the Marine Dive Fair, the Outbound Travel Fair in Taiwan, and the Miss Island Contest in Jeju Island, Korea.

Seeing the need to continually send a Miss Guam representative to various promotions, the GVB Board of Directors

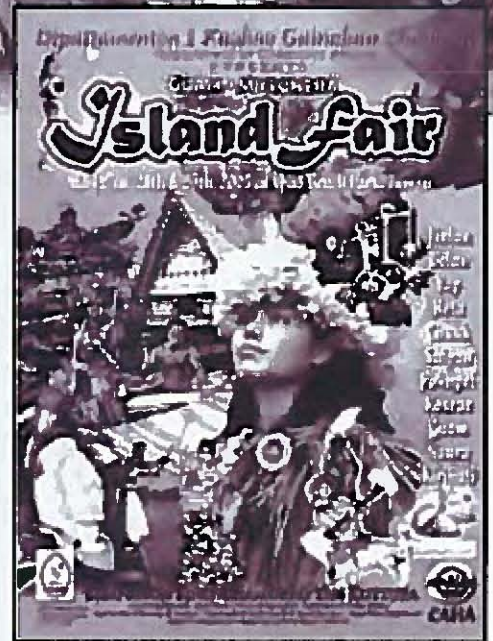




annually approves funds to sponsor the Miss Guam Tourism Pageant. The pageant has proved to be a continued success and will continue to grow in the years to come.

Perhaps the largest cultural promotion that the Cultural and Heritage Committee handles is the Guam Micronesia Island Fair (GMIF). The annual event is a 3-day cultural event that provides local residents and visitors the chance to buy, sell and enjoy Micronesian handicrafts, food concessions, entertainment as well as agriculture displays and products. Because the GMIF was established through public law, any changes need legislation. In FY2001, the Bureau requested for a change in the current law to allow the Bureau to move the dates of the fair at the discretion of the GVB. The reason for the change was to allow the Fair to be held

during marketing campaigns or other opportunities that would increase visitor arrivals. Accordingly, Public Law 25-126 was enacted and GVB moved the Fair from May 2001 to September 28, 29, and 30, 2001 in order to provide a closing event for the Guam Big Summer Festival – a summer marketing campaign. In 2005, the event was moved back to May and took place from the 28-30th at Ypao Beach Park.



Tourism Attraction Fund Planning & Development Committee

Special Projects

FY2002-FY2005



The TAF Committee identifies capital improvement projects (CIP) that will enhance the tourism plant; seeks appropriation for those projects; and pursues their implementation. The island's infrastructure and attractions must be developed, improved and maintained so Guam can stay competitive with other world-class destinations.

Although FY2002 saw CIP funding reductions, the Guam Legislature provided adequate funding for development, upgrades, and maintenance in FY03, FY04, and FY05. Below are examples of key programs.

Tumon and Agana Beach Cleaning & Maintenance

This is the daily mechanical raking and trash pickup from Gun Beach on the northern tip of Tumon Bay to the southern reaches of Alupang Cove in East Agana.

Tumon Landscaping Maintenance

This entails five-day-a-week landscaping, trash pickup and regular water blasting of sidewalks and infrastructure along San Vitores Road up to the Bishop Flores Rotunda, including the median islands, GVB Office and the three major intersections leading to 'Hotel Row', i.e., Horizon Condominiums to Westin Resort Guam, John F. Kennedy High School to Guam Marriott Hotel, and Ypao Road to Hilton Guam Resort & Spa. Legislative funding included allotments for irrigation system repair and maintenance, post-typhoon cleanup, and re-planting (crotons, for example, replaced the dying ixora plants in nine medians).

Although Phase II of the Tumon Redevelopment Project interrupted landscape maintenance along southern San

Vitores Road for a year and a half, Guam Visitors Bureau immediately assumed oversight of the area upon completion of the upgrades in late 2004, with Guam Tropical Landscaping being awarded the annual maintenance contract.

Guam Village Beautification

As an incentive for villages to beautify highly visible and frequently visited areas along the scenic routes of Guam, the TAF Committee initiated this grant program in FY2002. The project was pursued jointly in cooperation with the Guam Municipal Council, Guam Beautification Task Force and the Department of Agriculture. With the support of these organizations, GVB provided two separate grants of \$25,000 each to the Villages of Tamuning and Hagatna to develop, beautify and maintain areas across from Alupang Cove



(Agana Bay) and along Route 4 from the Court House to the Chief Quipuha Intersection.

Each project included a conceptual design requiring low-maintenance plants, rocks, and regular sprucing. The program and the successful beautification projects were inspired were promoted in the media to raise public and visitor awareness and participation in the island-wide effort to clean up Guam and keep it that way.

Two Lovers' Point Jogging/Biking Trail

Maintenance of the trail continues to include monthly site clearing and cleaning, replacement of safety/directional signs as necessary, removal of "unauthorized dumping" and minor upgrade of the trail's overall appearance. Funding for this project was, however, reduced in 2003 and eventually phased out during the succeeding years due to lack of resources.

Tumon Bay Beautification

In 2003, Federal Emergency Management Agency subsidized the repair and restoration of the damaged ocean-side beautification project behind Guam Marriott Hotel. The original beach furniture, trash receptacles, barbecue pits, and WWII bunker stairway were cleaned up and repaired.



Island-Wide Highway Maintenance

Conceptualization of this project began in mid-2004; bidding started in January 2005; and the actual project launched by May 2005. With a focus on maintaining safe and aesthetically pleasing streets and roadways island-wide, GVB and the Department of Public Works partnered up and outsourced the

necessary services in order to present our residents and visitors a beautiful, well-maintained landscape along our island roads.

The year 2005 saw the Bureau hiring a quality assurance manager to oversee the Tumon & Agana Beach Cleaning & Maintenance, Tumon Landscaping Maintenance and the Island-Wide Highway Maintenance projects.

Tourism Industry Relations and Visitor Satisfaction Committee (TIR)

FY2002-FY2005

Certain activities of the TIR remained constant from FY2002 through FY2005. They include welcome services such as the official greeting of VIP's, ships, incentive groups and media. GVB also continues to recruit prospective tour guides to the Tour Guide Certification Program at Guam Community College. All certified guides are required to renew their ID badges annually at GVB, which is responsible for the enforcement of Tour Guide Rules and Regulations, signed into law on January 2, 1997. Finally, Visitor Safety Issues were continually addressed to ensure that Guam remained a safe and satisfying destination.

Below is a year-by-year snapshot of TIR accomplishments from FY2002 through FY2004.

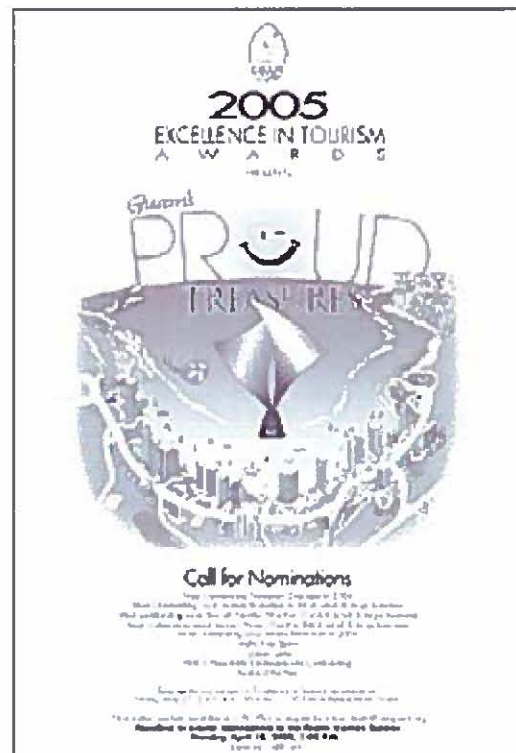
FY2002 TIR funding was drastically reduced to \$127,000, thus limiting major accomplishments to the successful implementation of the Island 10 Campaign. Island 10 was a multimedia public outreach program designed to enhance local awareness of tourism and its benefits. It was carried out through radio, television, print, and movie theater advertisements.

In FY2003, TIR produced a Visitor Assistance Video for Immigration at AB Won Pat Guam International Airport and established the Adopt-A-Park Program. With the help of Americorps, the Superior Court and Department of Corrections, TIR coordinated successful maintenance of the following major parks: Fort Apugan, Fort Soledad, Fisheye Marine Park, Inarajan Pool, Latte Stone Park, Nimitz Beach, and the Statue of Liberty at Paseo.

In FY2004 TIR concentrated on security and safety programs including the production of a multilingual Homeland Security video for playback in the departure areas of Guam International Airport and the donation of rescue equipment and supplies to the Guam Police Department, Guam Fire Department, and Department of Parks and Recreation lifeguards.

TIR also brought Dr. Peter Tarlow to Guam to address airlines and the visitor industry at a safety and security seminar. The Adopt-A-Park Program continued to upgrade park grounds.

TIR's FY2005 programs reflected GVB's intent to improve the 'Destination Guam' product through attention to the details of safety, order and opulence. Adopt-A-Park activities included the construction of entrance gates at Fort Apugan, Fort Soledad, and Nimitz Beach, as well as the hiring of senior citizens for park maintenance and upkeep. Furthermore, multilingual beach safety signs (with flag safety directions) were erected at major beaches. Safety equipment and supplies were provided for Ypao Beach Park lifeguards. Additionally, TIR oversaw the production and installation of handbiling prohibition signs for Tumon, plus the production of taxi rate cards and their distribution to hotels and tour agents, as well as the implementation of anti-graffiti measures.





Membership Committee

FY2002-FY2005

The main objective of the Guam Visitors Bureau's Membership Committee is to grow and retain membership by providing valuable services, opportunities and benefits that will enable its members to maximize their marketing, networking and relationship-building opportunities. The numerous benefits of GVB membership include active involvement in the Bureau's standing committees; access to statistical and research information; opportunity to participate in cooperative marketing programs; representation in government, business and community; quarterly general membership meetings; exposure on the GVB website and within other promotional material and publications, etc.

The Membership Committee is also responsible for overseeing the nomination and election of its Board of Directors every two years.

FY2003

GVB members showed overall disapproval of the Bureau's marketing programs, website and promotional materials, product development, and the Board of Directors election process. These areas received the highest numbers of "unsatisfactory" marks on a 150-respondent survey conducted at the Bureau's second-quarter Membership Committee luncheon in late March. The survey was part of the Committee's efforts to better serve members.

To help members get more out of their GVB affiliation, the Committee tried to "break the mold" and make for better meetings with greater turnout. Suggestions for improvement ranged from having a quarterly "theme" meeting, holding meetings in the late afternoon followed by a social mixer or a roundtable discussions on a few "hot issues".

Guest addresses at General Membership meetings included GVB Board Chairman and Guam Hotel & Restaurant Association President David B. Tydingco's "Accept Nothing Less Than

Excellence from Your GVB", in March, and Guam Governor Felix P. Camacho's "Fueling the Tourism Engine", in June. Also, "Tourism and the Military Working Together" by Rear Admiral Patrick W. Dunn of ComNavMarianas and Colonel Gregg Sanders, Vice Commander, 13th Air Force.

The Membership Committee counted 445 GVB members in FY03.

FY2004

As a sequel to the Membership Committee's efforts to encourage more active member participation and involvement, the

Committee held two fall forums (10/14 and 11/1/03) at the Pacific Islands Club to discuss GVB Board election and composition – issues that had generated a good deal of controversy over the previous several years.

But a poll conducted by mail indicated that the general membership opted for the status quo. And that meant no change to GVB election procedure. Other Board procedural options in the survey were as follow:

- Adopt a one member (or company) / one vote procedure (with stratification of membership dues according to gross revenues);
- Adopt limit of five votes per company (like Chamber of Commerce); or
- Opt for no election, with Chamber of Commerce nominating two directors and the other two being selected by GHRA.

When the Membership Committee counted members in FY2004, the rolls had shrunk to 336, representing a 25 % decline from the previous year.



Another open forum was held on 9 March 2004 to garner members' views and opinions on how to best improve membership benefits. The idea here was to encourage members to take better advantage of their existing benefits and to discuss ways of adding more value to GVB membership. But a lack of quorum and inadequate attendance prevented any meaningful changes from taking shape.

Guest addresses at FY04 General Membership meetings included "Guam's Brand Image" by Asatsu-DK Vice President Shunsuke Ando and "Tumon Bay's Wild & Wonderful Marine Life" by Department of Agriculture, Division of Aquatic & Wildlife Chief Gerry Davis – both at the March meeting. Also, "How Tourism Surety Makes Good Marketing Sense" by well-known tourism authority Dr. Peter E. Tarlow, in August. An Excellence in Tourism Awards ceremony was conducted in May.

FY2005

A total of 1,729 votes were cast at the annual membership meeting and Board of Directors election, held January 4, at Pacific Islands Club. A total of 348 paid members were eligible to vote. Newly-elected Board members included Bruce Kloppenburg (376 votes), Carl Petersen (371 votes), Manfred Pieper (360 votes) and Joseph Camacho (355 votes).

Recognition and awards were presented during the March membership meeting to acknowledge the highest in-kind contributor and to recognize GVB members with 30 or more years of standing.

The Membership Committee approved the production of an FY06 GVB Membership Directory. The Directory was to be funded through ad solicitation and spearheaded by Guam Publications, Inc. Distribution is set for mid-January 2006, and the publication will be available in multiple formats: 2,000 print copies, 300 CD copies, and an online version.

The Directory will be a comprehensive publication targeting existing, new and potential mem-

bers, as well as valuable organizations overseas. It will contain resourceful information about GVB and our island destination.

Specifically, it will be a great source for contact information, event calendaring, visitor statistics, Guam history and more. It is designed to be a high-quality marketing and networking tool.

Guest addresses at FY05 General Membership meetings included "Destination Improvement – What it Means and How It Can Be Accomplished" by Guam Senator Antonio R. Unpingco, Chairman, Committee on Tourism, Maritime, Military & Veterans Affairs, in March, and "Putting Serve Back Into Service" by Guam International Airport Authority Chairman Frank F. Blas, in July. Then, at the October (FY06) General Membership meeting, Guam Delegate Madeleine Z. Bordallo delivered her speech, "Helping the Visitors Industry: A Federal Perspective".

By FY05, GVB membership ranks had swelled back up to 447.



Sports Tourism

FY2002-FY2005

On April 26, 2003, the Sports Tourism Action Group was established through Public Law 27-12 to study and develop plans for enhancing and expanding Guam's sports facilities and infrastructure, enabling Guam to host regional and international sports events and effectively promote sports tourism.

As a result of that study, the GVB Board of Directors approved the creation of the Sports Tourism Committee on October 9, 2003. The committee is tasked with the responsibility to encourage marketable sport activities and provide opportunities and support to sports federations and individual athletes to win at the highest level of competition.

The Committee is responsible for reviewing and recommending board approval for grant applications received by non-profit organizations or individuals. Funds are programmed to support the development of international on-island events that would encourage community awareness and support of the benefit of sports tourism. Financial

Grants are awarded on the merit of the event and are subject to the terms and conditions stipulated by the Management and the Committee.

FY 2005 was an exciting and exceptional year for Sports Tourism. The island witnessed the continuation of many well-attended events first introduced in FY 2003. The Hilton Guam Resort & Spa's 2nd Annual Guam International Tennis Open is a clear example of a successful event. GVB and various sponsors assisted Hilton in successfully reaching their goals in bringing to the island the first ever USTA (United States Tennis Association) sanctioned tournament. In 2003 the tournament hosted close to 100 participants from Australia, Japan, Palau, South Korea, Saipan and Guam. International participation increased by 238%, bringing in 17 international players as opposed to 6 from the previous year. In 2004 the tournament hosted 18 international players and in 2005, there was an increase to 35 players giving the event a 49% increase in international participation.

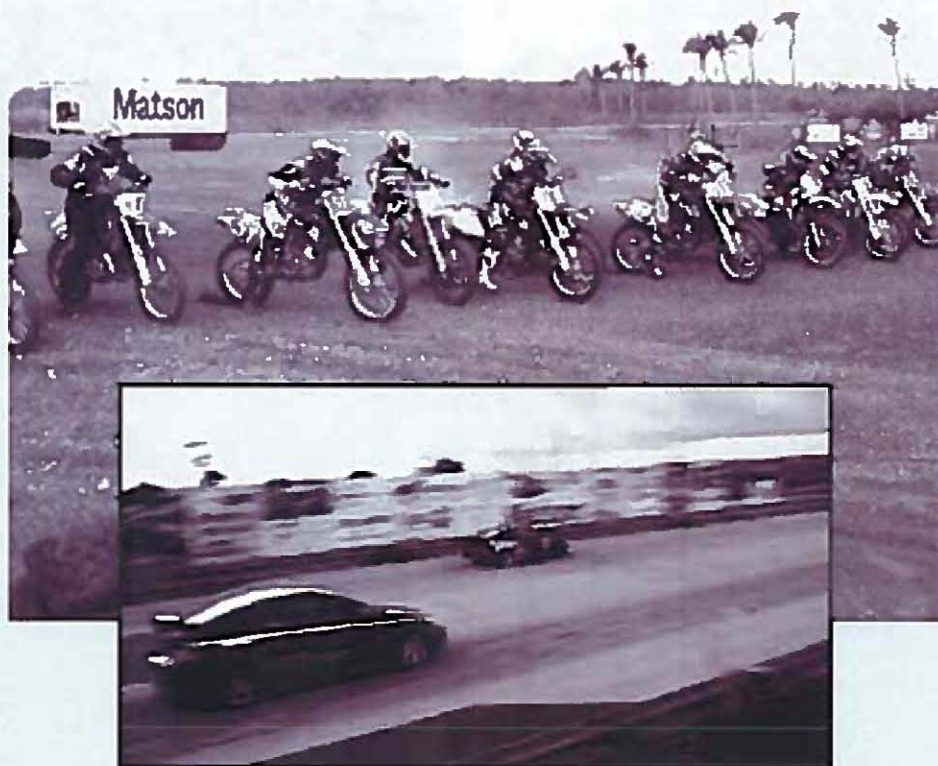
Rugby has been making its way into our homes and even schools. People of all ages can now participate in the game as it has been introduced into the school system (public and private) as an interscholastic sport. From June 16 – 18, 2005, the Guam Rugby Football Union hosted the Asian Rugby Football Union (ARFU) Mid-year Council meeting in conjunction with Guam's first ever International Rugby Match. Eighty off-island visitors comprised of players, game officials, journalists and friends visited the island. Guam welcomed federation representatives from our neighbors such as Japan, Korea, Hong Kong, Philippines as well as from further a field – Laos, India and Uzbekistan. The GRFU was established in 1998 and hosted the Rugby tournament at the South Pacific Games on Guam in 1999, which included two of the world's top International Rugby Sevens teams.

Another successful annual event is the Guam Racing Federation's 'Smokin Wheels' The Guam Racing Federation (GRF) has operated and man-



assistance is offered to individuals or groups who wish to compete and represent Guam at the international level.

Seed money is also made available to non-profit organizations wishing to supplement the cost to coordinate an event or activity involving sports.



aged motor sport-racing activities at the Guam International Raceway since its opening in January 2000, including premier off-road racing event, the "Guam Smokin' Wheels" at the Calvo Memorial Off-road Park, Phase 1 of the raceway. Under the GRF, various racing organizations share their resources in marketing the Guam International Raceway to both local and international motor sports enthusiasts and spectators. The Annual "Guam Smokin' Wheels" race has brought in racers from Japan and the United States for many years. The race has been highlighted in several off-island publications including 4-Wheel Drive Magazine and Japan Off-road Magazine. The events have also aired on ESPN for the last three years.

In 2004 GRF garnered a special legislative appropriation of \$68,000 from TAF funding and in 2005, grant appropriated monies amounted to \$15,000.

The Guam Bowling Congress's 8th World Tenpin Youth Championship, which was held from July 28 – August

8, 2004 was a great success. Twenty-eight countries, which include Argentina, Australia, Canada, Chinese, Taipei, Columbia, Dominican Republic, England, Finland, Hong Kong, Ireland, Japan, Korea, Kuwait, Macau, Malaysia, Mexico, Philippines, Puerto Rico, Qatar, Saipan, Singapore, South America, Spain, Sweden, United Arab Emirates, and Venezuela were in attendance. In 2005, GVB granted the Guam Bowling Congress \$15,000 for the 13th Asian Youth Tenpin Bowling Championship. The event accommodated roughly 300 delegates representing 18-22 countries. The event showcased the top youth bowlers 22 years of

age and below at the Central Lanes Bowling Center. The event established goodwill and friendship amongst the members of the Asian and Oceania bowling community, while promoting our island's culture, warmth, and hospitality, as well as the aspect of competitive bowling to our local community.





Marketing

Department Overview

FY2002-FY2005

Top (L-R) Regina Nedlic, Felix Reyes, June Sugawara, Gina Kono, Elaine Pangelinan, Nadine Leon Guerrero, Dino Quintans
Bottom (L-R) Joe Okada, Jessica Camacho, Pilar Laguana, Loretta Garcia

The Department promulgates, coordinates and oversees official marketing efforts promoting Guam as a choice destination to the world. To meet this objective, the Department implements projects, activities and opportunities that provide exposure for the island.

Although Guam's visitors come from all over the world, the Bureau targets and actively promotes Japan as its primary market, Korea as its secondary market, and Taiwan, Hong Kong/China, the Philippines and the United States as tertiary markets. These are the markets that make up the largest percentages of visitor arrivals on Guam every year.

To stay abreast of travel trends in each of these markets and to ensure that promotions will be effective, the Bureau contracts marketing representation offices in Korea, Taiwan, Hong Kong, the Philippines, and the U.S. mainland. Additionally, the Bureau maintains a branch office in Tokyo, Japan and a branch office in Osaka. All of these offices provide market intelligence and coordinate overseas promotions, advertising campaigns and public relations in their respective areas. In an effort to bolster marketing in Western Japan, GVB relocated and expanded its Osaka office in 2002. Incidentally, GVB's Hong Kong office was temporarily shut down in 2003 due to a slowdown in tourism traffic.

In addition to the support provided by the overseas offices, the Bureau relies on the assistance and advice of Guam's tourism industry members through GVB's four marketing standing committees. Each committee is responsible for reviewing and evaluating proposals and projects developed to increase market share and visitor arrivals. A GVB marketing officer is assigned to each committee and handles the day-to-day coordination of all activities and general operations pertaining to their respective committee.

The Marketing Department oversees the production and printing of Guam's official destination collateral material for travelers and visitors. Among annuals and semi-annuals published by the Bureau between fiscal years 2002 and 2005 were the General Information Brochure, Calendar of Events, Travel Agent's Sales Manual (Japanese), and Guam Guidebook (Korean).

During this period the Bureau also developed the i-love-guam.com website for the Japan market.

The following GVB Marketing Committee summaries briefly encapsulate the significant developments that have unfolded within GVB's key markets during the course of the last four fiscal years.



Japan Marketing Committee FY2002-FY2005

As Guam's number one tourist market, Japan gets the lion's share of GVB's annual marketing budget. And year after year, the Japan Marketing Committee spearheads the attraction of this vital travel market to Guam.

FY2002

At the outset of FY2002, the Guam visitor industry was still reeling from the global after-shocks of the 9/11 disasters in the US mainland. To recover the drastic decrease of Japanese tourists to Guam, arrangements were made for press conferences, trade seminars, and October 2001 courtesy calls in eight

major Japanese cities. Led by Governor Carl T.C. Gutierrez and then Senator Felix P. Camacho, two teams were sent throughout Japan encouraging travel to Guam via travel agents and Japan government officials.

In an earlier move to bolster marketing efforts, GVB launched the Japanese language website www.i-loveguam.com on November 27, 2001. The site includes basic information about the island, plus detailed event, activity and service schedules.

On May 30, 2002, over 80 travel agents from Japan and 61 companies from Guam participated in a seminar and trade

show at SandCastle and right next door at Hyatt Regency Guam. The show was part of the Hafa Adai Guam Study Tour, designed to familiarize group travel agents with Guam's various optional group tours and packages, including incentive groups and wedding parties, among others. The tour took place from May 29-June 1, 2002. The Hafa Adai Study Tour is an annual event sponsored by GVB, Guam Hotel & Restaurant Association, JGTA, its members and various airlines,

FY2003

Beset by travel trade uncertainty in-



ties in the aftermath of Super Typhoon Pongsona's direct first-quarter hit on Guam, desolated by fears associated with the US War On Terror and American invasion of Iraq, and saddled with marketing budget reductions, the Japan Committee's FY2003 marketing efforts focused on branding Guam as a safe destination in close proximity to Japan. Taking JMC's recommendations in hand, elected officials and GVB board and staff paid personal visits to Japan's travel policy decision makers while diligently pursuing and accruing high profile earned media across the country.

According to GVB research conducted in Tokyo in January 2003, 74.4% of respondents had said they would cancel their overseas travel if war erupted in Iraq. And 76% of those respondents had indicated that they would cancel their travel to US destinations such as Hawaii, Guam and the US mainland in the event of war.

To alleviate feelings of insecurity about visiting Guam during war and typhoon recovery, the Japan Marketing Committee organized a series of travel trade missions to Japan.

During the 54th Sapporo Snow Festival, 30th International Snow Statue contest held February 2-8, 2003, team Guam was represented by chefs Jhamons Kraitons (Westin), Chito Iglopas (Planet Hollywood, and Irving Clemen (Marriott). Their Carving, the "Ocean Symphony", designed in part by Ricardo Valdez (Guam Reef), placed 1st out of 17 International teams.

Senator F. Randall Cunliffe, Chairman of the Committee on Transportation, 27th Guam Legislature, led a contingent of GVB board and staff to the Ministry of Foreign Affairs in Tokyo in mid-February with assurances that Guam is a safe destination and urgings not to include Guam in the Ministry's "Danger Zone" advisory. The GVB team also visited the Ministry of Land,



Infrastructure and Transport with notification that Guam's daily life would not be interrupted and that the island would continue welcoming visitors enthusiastically.

Learning that final instruction and decision on travel policy rests with the Governors of Japan's prefectures, the team also visited several governors and big-city mayors with similar 'safe-travel' assurances.

In addition to the efforts of the GVB team, Governor Felix Camacho met with Mr. Koji Shinmachi, Chairman of the Japan Association of Travel Agents (JATA) both on Guam and in Tokyo, resulting in his recommendation of travel to Guam despite world events. At least \$16m worth of large-scale media tie-in projects kept Guam in the Japanese limelight during this period of uncertainty. GVB was able to access

'Destination Guam' coverage on major TV programs and national networks as well as in wide-circulation weekly and monthly magazines.

The Bureau also conducted co-op promotions with travel agencies, airlines and other partners to minimize cost. The series of promotions included personal visits by Miss Guam and GVB staff to travel agencies and public shopping areas in Japan.

To further bolster Guam's budget-conscious marketing strategy, GVB, Guam Hotel & Restaurant Association, Japan Guam Travel Association and all airlines connecting Guam to Japan hosted 200 travel agents from all regions of Japan during the Guam Recovery Super Familiarization Tour from January 30 to February 4, 2003. Mirroring FY2002's Hafa Adai Study Tour, Super Fam also included a seminar, trade show, site inspections tour, and a welcome reception. Local hotels and optional tour companies provided services to travel agents.

From July 1 through September 30, 2003, the Guam Big Summer Festival gave Japanese visitors added value for their money during their stays on Guam through the promotion of GVB members'

events and sponsor-hosted activities, and the awarding of prizes to Office Ladies and Children, ages 2-to-11.

Those within targeted demographics were each allowed one chance to win a prize at a designated redemption center.

Of the 11,853 visitors who participated by August 3, 2003, 18 of them won airfare for two to Guam, 5 won hotel accommodations, and 4,138 Office Ladies and 2,747 Children won T-shirts.

FY2004

Still recovering from worldwide travel inhibitions sparked by the War on Terror and regional scares stemming from the threat of Severe Acute Respiratory Syndrome (SARS), GVB and JMC focused on big-number events and programs for Japanese travellers and industry professionals during FY04.

For four days straight (October 2-5, 2003) Guam shone as brightly as ever at the biennial Japan Association of Travel Agents (JATA) Travel Mart – this time merged with the World Travel Fair in Yokohama to provide more value, convenience and opportunities for the Japan travel trade and general public.

More than 40 of Guam's travel industry partners, including GVB's delegation, pitched travel wholesalers and consumers at the Guam pavilion, where Guam's cultural show performed 3-4 times per day. GVB Deputy General Manager Ernie Galito stated that one of the unique characteristics that sets the Guam booth apart from the other 650 exhibitors is that GVB has its own stage with performances taking place throughout the fair day. Perhaps it is little wonder that the Guam cultural show was invited to perform on the main stage of the JATA World Travel Fair, as well! The Hafa Adai spirit reached a crescendo when Guam's famous JATA

Coffee Break transformed into a lively fiesta with giant Guam scenic backdrops, cha-cha lessons and fina mames for all! Post-event reports from JATA said the event attracted nearly 100,000 attendees during its three days.

In a special visit by the Governor himself, the Honorable Felix P. Camacho and the Guam delegation to the JATA World Travel Fair visited Camp Zama (US military base outside of Tokyo) on October 2, to spread Hafa Adai cheer to the Chamorros stationed there. The group brought a little bit of home to the soldiers through a barbecue lunch, cultural show, fina mames and pure Guamanian camaraderie. Governor Camacho and GVB General Manager Tony Lamorena encouraged Camp Zama Major General Elbert Perkins to promote Guam as a rest & relaxation (R&R) destination.

Fresh off a strong showing at the JATA World Travel Fair and still itching to promote off-peak late-fall travel among 20-29-year-old Office Ladies, members of the Guam delegation, including the cultural dance troupe, garnered approximately \$6m worth of ad value and media exposure by participating at a TV Asahi and Asahi Newspaper outdoor promotion attended by 400,000 visitors in the trendy Roppongi Hills district of Tokyo. The event celebrated TV Asahi's new state-of-the-art television studios. The GVB contingency had been invited to attend as the exclusive National Tourism Organization designee and, while there, joined the Pink Ribbon Smile Walk to promote breast cancer awareness among women.

To promote Guam's world-class dive sites and expert scuba instruction, GVB also attended the Marine Dive Fair at the Sunshine City Convention Center in Ikebukuro, Tokyo from April 2-4, 2004. All activities in FY 2004 resulted in a total PR value of over 35 million or a 954% ROI over the amount spent for advertising.



FY2005

Guam saw a remarkable 25% increase in arrivals from Japan during FY05 – from 748,914 to 938,731.

Continuing on with the Guam Live Presentations, a Guam show was designed to bring our unique culture directly to the general public in Japan. A series of shows were held at popular locals in various cities resulting in an ad value of over \$324,800.00. Held in the cities of Hiroshima, Kyoto, Kobe, Nagoya, Osaka, Sapporo and Sendai, Miss Guam Tourism(s) and entertainers traveled throughout Japan distributing fliers and Guam's warmth during the winter season. Many people stopped at the shopping malls and train stations to watch the cultural performance or to take a picture with Miss Guam Tourism.

The focus of FY05's Hafa Adai Study Tour was on how to attract an even larger Wedding Market from Japan. Over the past few years, Guam has been the setting for many Japanese Nuptials. Various Bridal Companies have invested millions of dollars to upgrade their facilities and improve their product. Just this year alone, several new chapels were constructed to meet the demands of the industry.

From May 29th to June 4, several tour agent groups from Japan experienced Guam's various optional tours and packages during the Study Tour. Event highlights included a Mini Trade Show at LeoPalace Resort, a welcome reception at the Hyatt Regency and site inspections of the various Wedding chapels.

Guam's direct service from Japan increased in 2005 with the addition of Continental's air route from Hiroshima. Beginning on April 7, 2005, Continental's twice a week flight was brought about through the support of the Hiroshima Prefectural government, led by Governor Yuzan Fujita.

In recent years we have seen the rise of Package Tours to the island. The focal point of these tours is mostly sightseeing. Though this market brings in its fair share of revenue,

an even bigger source of income could come from the Group Tour spending. Earlier in the year, Guam played host to 400 employees from Toyota Motors Italy. These company incentive tours constitute the type of market GVB would like to attract to the island more regularly. Indeed, GVB Deputy General Manager Mary Torres noted: "It is important that we further define the images of Guam. We are already known for our sand and surf, but we can also be the venue for company trips, educational and sports events and extended visits."

On a summer trip to Japan, Guam received an estimated value of \$70,000 in TV exposure, radio, and print editorial while showcasing the island's cultural and tourism attractions in Nagoya and Osaka. The Delegation, headed by GVB Japan Marketing Officer Nadine Leon Guerrero and attended by three Miss Guam Tourism Winners, promoted Northwest Airlines' new Nagoya to Guam and Osaka to Guam routes, which would begin in October and November.

GVB General Manager Gerry Perez told the media that this marketing and promotion effort was designed to heighten destination awareness and support the start of new air service from these two cities.

Miss Guam Tourism winners, Ms. Jessica Ignacio (2004, 1st Runner-up), Ms. Maria Cristobal (2005, 1st Runner-up) and Ms. Desiree Eay (2005, 2nd Runner-up) appeared on Nagoya TV, Tokai Radio and FM Aichi, promoting Guam and inviting the residents of Osaka and Nagoya to come and visit our beautiful island. Guam also received coverage in the Chunichi Newspaper.

To help GVB and other exhibitors access more 'general consumer' traffic during the September

2005 edition of Asia's leading annual travel event, organizers had moved The Japan Association of Travel Agents World Travel Fair (JATA-WTF) to Tokyo International Exhibition Center ("Tokyo Big Sight") in Tokyo Teleport Town.



Korea Marketing Committee

FY2002-FY2005



FY2002

Having scored an astonishing 84% gain in annual arrivals from Korea between 1999 and 2000, by the end of FY2002 Guam was still holding steady at 87,307 arrivals.

Five years after the Guam crash of Korean Air Flight 801, the Korean Marketing Committee's FY02 marketing focus remained in recovery mode with long-term marketing strategies promoting Guam as a safe, fun, family-friendly destination offering value-added incentives for visitors and travel agents alike.

Akin to the Japan Market's GuamBare incentive card, the Korean Market's GuamSmart card offered visitors extra value when making select local purchases from November 20, 2001 – March 31, 2002. Incentives included free gifts, discounts, free cocktails, and more. GVB Korea promoted the card through various consumer media in South Korea. In the month of January, GVB distributed nearly 2,500 GuamSmart cards in Korea, in February nearly 2,000. All said, 20,000 cards were produced and 15,000 of those were distributed through the nation's top 20 travel agents. The remaining 5,000 were distributed through smaller agents and to individuals upon request. GVB Korea also distributed the card along with a guidebook by direct mail. Through word of mouth, press releases, and media coverage, the GVB Korea office was flooded with telephone and email inquiries from consumers and travel agents alike. Encouraged by market reaction, in February KMC vowed to continue the campaign.

During a mid-February 2002 KAL Hafa Adai Study Tour, newly reacquainted Korean travel agents were pleased to see the changes that had taken place on Guam during Korean Air's five-year absence after the August 1997 Guam crash of KAL Flight

801. The itinerary was designed to have agents absorb as much information as possible without forfeiting their opportunity to enjoy Guam as a resort destination. Eighteen (18) manager-level agents and one travel media reporter participated in the tour.

Guam and several of its highest-profile attractions got a big media boost in the Spring of 2002 with multiple telecasts of four special Guam episodes of NTV's famous Power Golf Show, which covered a Guam International Airport Authority (GIAA) golf tournament, several high-profile local attractions, and parts of Central and Southern Guam. Plus, top Korean comedians Mr. Lee Kyung-Kyu and Mr. Kim Yong-Man appeared in a series of golf match plays at Talofofo Golf Course. Four 60-minute episodes aired over a four-week stretch in April/May, with multiple reruns in tow. The funnymen enjoyed spending time with their families on Guam.

FY2003

To help overcome travel reluctance caused by the US War on Terror, Super Typhoon Pongsona, SARS, and even the years-old KAL crash, KMC's FY2003 campaigns sought to protect market share and boost numbers with feel-good promotions, tie-ins, and earned media.

The Korea Guam Tourism Council (KGTC) met at Hilton Guam Resort & Spa from January 17-18, 2003, to assess typhoon damage and the quickest, most affordable ways to attract more Korean tourists.

One answer came in the form of elevated PR efforts through popular Korean television shows. KBS network's Let's Go Dream Team celebrity sports show taped three 35-minute episodes on Guam in February, for an approximate \$3 million

worth of publicity value. That same month, MBC network's Golden Coach morning drama series filmed parts of a one-hour episode on Guam for approximately \$738,000 in ad value. By the second week of March, Guam location shooting had wrapped on SBS network's Escape From Everyday Life travel show. Media exposure for the springtime coverage on Escape was estimated at \$219,000.

With assistance from Asiana Airlines, Korean Air, and Guam Hotel & Restaurant Association, a mid-March Korea Super Fam Tour showed 27 Korean travel agents, 10 print media representatives, and two GVB Korea staff that Guam had fully recovered from Super Typhoon Pongsona. Participants felt that the warm reception they received on their tour and the enthusiasm and information of the travel trade mart made up for hotel rooms that were less luxuriant and more expensive than those typically found in Southeast Asian destinations. They perceived Guam to be a resort destination better for weekend relaxation, refreshment and shopping than for sightseeing, although they loved the turquoise ocean water and the dolphin watching. They strongly suggested marketing high-end shopping and making the travel experience more user-friendly for Korean tourists by having more Korean-language signs and brochures. Agents suggested marketing more to FITs, SITs, college students, and families and less to honeymooners. They said the tour itinerary was organized and structured but a bit too tight.

Aiming to cross-promote Guam's sports-leisure and honeymoon niches from April through September, GVB participated in a unique philanthropic co-op program with Korea's most popular baseball team, the LG Twins, which trains on Guam for its winter camp every year. Prior to homecoming games on Sundays during baseball season in Korea, the LG Twins sponsored wedding ceremonies for selected couples that had registered their marriages but that couldn't afford traditional nuptials. To round out the promotion, GVB sponsored six honeymoon packages with air and hotel accommodations for four nights and five days on Guam (about \$9,000 for 12 pax). Destination exposure included 44 playbacks of a 20-second video advertisement on an electronic billboard, a still ad on a signboard at the stadium, a news release, photos of winning couples in sports media, and leaflet distribution to live baseball audiences (20,000 pax per week).

The weeklong June 2003 Korea Overseas Travel Fair (KOTFA) was slightly less well attended (down 7%) than the previous year's Fair, with lower National Tourism Office participation due to the regional SARS scare. Nevertheless, Guam had one of the most attractive and entertaining booths there, complete with Pleasure Island games and giveaways and the first-ever incorporation of latte stones into a Guam KOTFA display. The lattes drew a lot of attention, questions and photographs.

Chamorroitas danced every evening at the Grand Hilton Seoul's KOTFA Guam Food Festival, where Hilton Guam Resort & Spa chefs prepared Guamanian cuisine. Media was invited and Hilton Guam hosted a dinner for travel agents. Chamorroitas also performed during Lotte Department Store's KOTFA Guam Cultural Festival, where Guam tourism attrac-

tions and hotels were on display and GVB member brochures were disseminated.

FY2004

Several years of steady but relatively stagnant annual arrivals finally gave way to a remarkable 92,559 Korean visitors by the end of FY2004, up 16% from 87,341 tourists the year before! KMC's FY04 marketing programs remained characteristically aggressive and synergistic.

Despite impressive year-end numbers, the fiscal year got off to a slow start. To promote group travel during October-December 2003, KMC started a Group Event Support Campaign similar to the Japan Marketing Committee's cash incentive program for group tours. Requiring adult groups of 30 pax or more, the Support Campaign's air passenger-only tours typically included a group-participation event and was arranged through Korean Travel Association of Guam's member companies. All members of each tour group had to be on the same flight, stay in the same hotel for three nights, and be on the same schedule in order to be eligible for GVB Incentive Vouchers toward their visitation costs. About a month after the Korean incentive program was launched, GVB had received 25 applications. Most travel agents agreed that the program was helpful in saving cost and providing better service to incentive groups. But the agents also averred that the program was not the deciding factor in recruiting incentive groups and that the campaign did not benefit the agents' bottom line, because the incentives were applied to groups who had already decided to come to Guam. Therefore, the agents recommended that GVB develop more collateral, incentive brochures, posters, photo CDs, and CD ROMs about Guam for groups. Responding to the perceived need, GVB Korea started building diverse incentive collateral for FY2005.

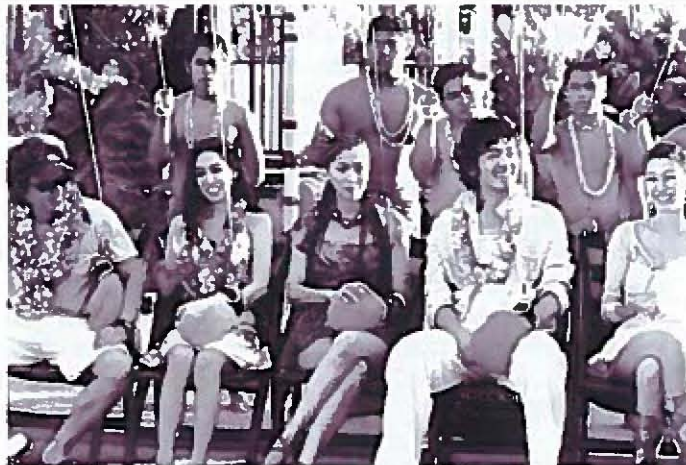
Coca-Cola's second annual Fanta Fun Camp drew considerable media coverage for Guam starting in late FY2003 and culminating in early FY2004. Between 300 and 400 campers had been recruited in Korea from July through September 2003 and flown to Guam on Korean Air for Fanta Fun Camp in late November of that year. In early August 2003 MBC TV's popular Saturday night "edu-tainment" program Exclamation produced a 20-minute piece on Fun Camp contestants who participated in a street event in Kangnam. Later in that month Chosun Ilbo had published a full-page story on the group of five intern students who would lead the Fun Campers to partake in activities at Nikko Hotel, Fai Fai Powder Sand Beach, and Ipan Beach in FY04. Special-edition Fanta cans and bottles with Guam visuals were sold in stores nationwide. TV commercials and news about the program appeared in various media. Research firm AC Nielsen reported at the time that Fanta Fun Camp was the most popular consumer event among competitive beverage-brand events and that about 98% of 1,500 respondents had said that they knew about Guam Fanta Fun Camp. GVB greeted Fun Campers with shell leis and sponsored an event at Fai Fai.

In June, GVB attended KOTFA 2004 at "Atlantic Hall, Co-Ex" in Seoul, Korea, where Guam delegates handed out the

Guam Guidebook, Guam Honeymoon Brochure, Guam Map, Guam Stickers, and other Guam information among 40 nations, 352 exhibitors and nearly 87,000 attendees. GVB's Korea office gave free cell phone cleaners to participants in the Guam Survey. In a money-saving move worked out with KOTFA organizers prior to KOTFA 2004, GVB Korea managed to get a free booth at the April/May Tour Expo in Daegu.

Guam Cultural Dancers performed in front of the Lotte Department Store for the Guam Cultural Festival portion of KOTFA 2004 to appeal to Lotte's mid-to-high income earners. A GVB information display table and a travel agent desk were set up to promote Guam and book reservations. Consumers who showed up were each given a raffle ticket to win a free trip for two to Guam. Leaflets on the Guam event were inserted into 60,000-circulation newspapers on two occasions, and press releases were distributed in conjunction with a website announcement. Lotte is the largest retail department store in Korea and controls well over a quarter of the market, according to year 2000 figures.

The KOTFA Guam Cultural Festival was also introduced at the popular "O'Kim's" F&B outlets, nearby the main event at Co-Ex. Targeting exhibition visitors, Co-Ex Mall shoppers, and O'Kim's customers, the Guam delegation's objective was to develop a promotion introducing Guam culture through performances, activities, costumes, decorations, and even a Guam Set Menu to create a festive island atmosphere, and to drive travel to Guam. Campaign media included 20,000 pieces of direct mail, 15,000 email shots, plus posters and banners.



FY2005

FY 05's Korean arrivals surged all year and reached 104,844 by the end of September, up 13% over FY 04's 92,559. That's nearly 54% of Guam's peak-year arrivals of 194,585 in 1996. Eight years later, the Korean Marketing Committee that was created to recover the Korean visitor market is halfway back to Guam's best year for Korean arrivals. The remarkable increase in arrivals is due, in part, to a concerted effort by Korean travel agents to increase the number of seats sold to Guam. Supporting their efforts, GVB continued to market Guam as a safe, clean, convenient destination in the midst of the turmoil and devastation that have plagued various Asian resort destinations such as Bali, Phuket and China.

GVB data showed that families and honeymooners comprise as much as 30% of Guam's Korean market. To help broaden the market, GVB also continued to support incentive and familiarization tours.

Additionally, the Bureau and its Korean office kept promoting Guam to Korean networks and television producers as an ideal setting for programming material; to group tour operators as a safe, affordable, proximate destination ideal for rest and relaxation; and to familiarization tours as the most hospitable place in the Pacific.

In late January, GVB, joined by some of its members, participated at the WEDDEX 2005 in Seoul, South Korea. WEDDEX, as the premier wedding and honeymoon trade fair in Korea, is an important component of GVB's marketing efforts to increase the number of weddings and honeymoon travel to Guam. In early June, GVB and its members also participated at the KOTFA 2005, also in Seoul, South Korea. KOTFA, as the largest travel trade fair in Asia second only to JATA in Japan, also plays a very crucial part of GVB's efforts to reach the general consumer base in Korea. GVB, along with attending members, accentuated its booth presentation with cultural dancers, entertainers and Miss Guam Tourism. GVB won the Best Cultural Entertainment Award and Best Promotion Award for its booths during KOTFA.

In April, GVB was invited to participate at the first LOTTE Travel Fair in Seoul, South Korea. Lotte Department Stores provided GVB with free booth space. The fair was attended by Miss Guam Tourism 2005, Ms. Natasha Afaisen, who was the attraction of the event as she mixed with the crowd in the giant mall.

In August, the KMC Chairman joined the Korea Guam Tourism Council (KGTC) to watch a historical soccer match between North Korea and South Korea. The KGTC was brought to Guam in early December to see first hand Guam's upgraded facilities such as the Fiesta Resort Guam, study opportunities with Educational Tourism and the study of English at the University of Guam and St. John's School. They also received a briefing on Guam's golf courses as GVB and the KMC endeavor to market Guam to high end Korean travelers such as golfers as part of its efforts to re-brand Guam's image, different from other warm destinations.

As the New Year comes around, GVB is poised to take advantage and drive up further the arrivals surge experienced during 2005 with new and exciting opportunities to raise the level of visitors to Guam both in numbers and in prestige. The Guam Fiesta International Marathon, the Guam Governor's Cup Invitational Golf Tournament, WEDDEX 2006, KOTFA 2006, airline and tour agent co-ops, familiarization tours, media tours, new ad creatives, TV commercials, and a host of other events being planned, will help increase yield and arrival numbers during 2006.

Asia Marketing Committee

FY2002-FY2005

The Asia Marketing Committee handles the strategies of the Taiwan, Hong Kong/China, and Philippines markets. Additionally, requests and proposals from other regions in Asia are also forwarded to this committee for review. Challenges facing Guam's development of this market over the past four fiscal years have included economic downturns, inflexible flight schedules, competition from other Micronesian destinations, worldwide travel warnings related to the War on Terror, the perceived threat of contagious respiratory infections in Asia and the uncertainties these airborne diseases posed to travel.

Taiwan

The Taiwan market is a small but growing segment of Guam's tourism industry. Guam's dominant marketing position in this small island nation is designed to appeal to a Taiwanese appreciation for convenience, cleanliness, beauty, safety and rich exotic culture. Naturally, Guam promotes its three-and-a-half-hour direct flights, visa waivers, lush scenery, tropical tranquility, and Chamorro and Spanish heritage to this resort-hungry market.

FY2002

In January all eight top Taiwan life insurance executives (General Managers and Presidents) on a familiarization tour were impressed with what Guam had to offer as a travel destination. During their stay they participated in various optional tours to evaluate Guam's potential as an incentive destination.

After touring Micronesia Mall Expo Hall and University of Guam Field House, conference organizer Mr. Tien Lung Liang concluded that Guam's facilities were equipped to handle an upcoming 2003 conference with an anticipated attendance of 1,000 participants, but that the local facilities would be inadequate for a planned 2004 conference, thereby supporting the long-held view that Guam sorely needs a convention center.

In February/March, a group of six non-life insurance managers and their spouses visited Guam, along with Nelson

Lin of the GVB Taiwan office, to scope out similar incentive travel opportunities.

FY2003

The threat of Severe Acute Respiratory Syndrome (SARS) decreased outbound travel from Taiwan in FY03.

To help keep Guam "top of mind" among young urban women during this travel slowdown, GVB entered into a co-op promotion with Kellogg's Taiwan to launch their Mueslix Raisin Almond Crunch and Harvest Fruit flavor cereals. The promotion started in mid-April, continued through August 2003 and reached approximately 3 million consumers, generating an estimated \$145,000 worth of exposure for Guam. This promotion targeted well-educated urban females, ages 25-35, who evinced "take charge" lifestyles.

By May, over 200,000 boxes of Kellogg's Mueslix cereals showing the Guam promotion had been sold. Marketing material printed on the box included a message of GVB sponsorship, GVB logo and Guam photo with text describing Guam. At a 'lucky drawing' event at the end of the promotion, six winners were each granted a complimentary two-night stay at Hotel Nikko with a 30-minute treatment at Mandara Spa.

FY2004

A GVB delegation garnered over \$30,000 worth of ad value while enthusiastically attending the 12th Annual Taipei International Travel Fair, November 15-18, 2003. GVB Taiwan impressed upon visitors that beautiful Guam is an ideal holiday destination. Promotional activities included a Hafa Adai Show performed at the Hsin-Yi Road branch of the Shin Kong Mitsukoshi Department Store, weaving demonstrations, and brochure dissemination. It was a great opportunity for travel agents to promote their comprehensive Guam travel products.

This travel fair is the biggest and most important travel exhibition in Taiwan. It attracts the greatest number of visitors and creates valuable marketing opportunities. The FY04 Fair recorded

88,059 visitors over four days, featured 538 booths tended by 1,750 representatives, and generated a great deal of media attention.

The GVB Taiwan office pointed out this major impediment to Taiwan market growth: limited-capacity 155-seat flights that depart inconveniently at midnight and that preclude Guam as an option for big group tours. Palau and Saipan are deemed Guam's major Micronesian competitors for the Taiwan market.

Hong Kong

By the fall of 2005, Guam's Hong Kong market was small, challenging, and declining with a 16% decrease in arrivals from FY04 (at 5,150) to FY05 (at 4,293), following a year of stagnation between FY03 (5,054) and FY04. Limited marketing budgets, regional economic slumps, health- and war-related travel advisories, and price competition from other destinations all kept GVB's Hong Kong marketers on their toes from 2002 through 2005.

FY2002

Lack of FY02 funding stalled Hong Kong media Fam tours and threatened overseas marketing to the Chinese island. But, thankfully, a landmark Asian beauty pageant brought not only a bevy of beauties, organizers and supporters, but a large delegation of journalists who paid their own way to cover the event on Guam, and along with television producers, generated about \$680,000 worth of free publicity for Guam.

In June 2002, Guam Visitors Bureau, in conjunction with Continental Airlines and Pacific Islands Club, hosted the 30th Anniversary edition of the Miss Hong Kong Pageant. Hong Tai, Hong Kong's largest retail travel agent was confirmed as the official travel sponsor. Worldwide Chinese viewership was estimated at 3.5 to 7 million. A spokesperson from network sponsor TVB told the media, "The natural beauty of the location combined with an excellent array of outdoor activities is what makes Guam the natural choice for our pageant."

Twenty of Hong Kong's most beautiful and glamorous young ladies participated in a range of activities at the Pacific Islands Club, Guam – including swimming, golf, diving, water park games, and Mandara Spa massages.

GVB Hong Kong and Continental Airlines had touted the Miss Hong Kong Pageant as a rare and powerful occasion for Guam to promote itself in dominant Chinese communities. At the time, the prospective partnership was being called a once-in-a-decade opportunity that should not be missed. Guam deftly and graciously capitalized upon the opportunity by recruiting local sponsorships to help defray costs.

Pageant television coverage included Chamorro dancing and such popular Guam scenic spots as Two Lovers Point. Pageant semifinals and finals were broadcast in July and August, respectively. To capture the footage required to produce two Pageant television shows, TVB videotaped 12 hours a day over a seven-day period in scenic locations throughout Guam. Twenty-five journalists covered the weeklong pageant video production. High-estimate value of television publicity for the pageant was pegged at \$400,000. Television pre-publicity and promotion stretched from May through August. Upon GVB's request, TVB even inserted a wedding segment featuring contestants in bridal gowns to help promote Guam's nuptial market to Chinese, overseas. Additionally, 25 print journalists representing some of the most popular Chinese newspapers and magazines in Hong Kong dispatched daily updates from Guam. Total print media coverage was estimated at \$280,000 in ad equivalency value. All 25 print journalists paid all of their own travel-related expenses, generating an estimated \$37,500 in additional revenue for Guam.

FY2003

In FY03 Hong Kong arrivals to Guam were challenged by higher unemployment rates in the Chinese province, price competition from cheaper fares to other destinations, and unwillingness to travel so soon after the fatal terrorist bombings in Bali.

Nevertheless, Continental Airlines and China Airlines increased direct-flight

seat capacity from Hong Kong to Guam from November 2002 through January 2003 to accommodate an expected increased demand for outbound flights from Hong Kong during Christmas and the Chinese New Year season.

In mid-May the Bureau reported that travel agencies Hong Tai and Wing On were actively promoting an attractive HK\$1,999 travel package to Micronesia, via Continental Airlines. The package included a pass to Alupang Beach Club. Additionally, GVB noted that Hong Tai and Wing On had proactively marketed the offer through different media outlets. Prominently sized print ads and TV commercials all supported the offer. Leading Hong Thai and Wing On shops designed a Micronesia deco to entice customers. But Hong Thai and Wing On's initiative happened during an inopportune time, because the returns did not match the investment. The US-Iraq war and bad socioeconomic sentiment were deterring potential customers from taking leisure trips.

On a hopeful note, however, some tourists who planned to travel were choosing Micronesia for fear of atypical pneumonia in Asian destinations. Continental Airlines worked with Hong Tai and Wing On to persuade clients who had planned trips to countries affected by pneumonia, to visit Guam instead.

In another aggressive move, GVB and its members teamed up to help six (6) Eat & Travel Magazine journalists gather information for a 16-page Guam/Saipan guidebook promoting these two Mariana islands as premier destinations for Hong Kong travelers. The guidebook focused on island entertainment, lifestyle, cuisine, outdoor activities and travel highlights and contained other special features. Eat & Travel is a weekly gourmet and travel magazine with the highest readership among all infotainment weeklies in Hong Kong. The Eat & Travel journalists toured Guam at the end of April.

FY2004

Education Development Expo
(July 2004)

FY2005

A Guam delegation headed by Joe Okada (GVB China Marketing Officer II)

and Chris Bejado (Marketing Specialist for UOG) was in Hong Kong for the International Travel Expo (ITE), which garners approximately 60,000 visitors each year.

TKS Exhibition Services Ltd., a newly formed company, was tasked with organizing the event this year. ITE has been organized for 18 years and is the most successful travel exhibition in Hong Kong. The 2005 ITE HK was scheduled for June 9 to 12, 2005 at Hall 1, Hong Kong Convention and Exhibition Center.

"Riding on the bullish economic recovery and the vibrant growth of the Hong Kong tourism industry, it is anticipated that the size of the event will be bigger than ever in terms of exhibitors and visitors," noted the ITE website.

GVB showcased Guam's over-all product presentation, once again exhibiting all that we have to offer – a rich history, unique culture, friendly and hospitable people, diverse shopping experiences as well as the myriad of recreational activities available. GVB also staged a Chamorro Dance Show presented by several local performers at the main ITE booth, the American Club and at the Gold Coast shopping mall.

While in Hong Kong, the Guam delegation discussed with the US Embassy, issues regarding Passport updates (HKSAR and BNO passports), and the expediency of obtaining a 10-year multi-entry visa.

The Guam Visitors Bureau, its Hong Kong & China representative office, Continental Airlines, Hotel Santa Fe, Global Wedding and World Bridal played host to 15 wedding couples as they exchanged their vows on October 13, 2005.

The Guam Wedding tour was ongoing from October 10-14, 2005. The couples got to experience an all-inclusive wedding package, complete with celebration dinner and gifts. They had the opportunity to have a southern tour of the island, an array of local cuisine, and much more. Accompanying the entourage were 7 media representatives from Hong Kong's top publications. A joint promotion with a HK wedding expo, which was held from August 27-29, 2005, generated much interest and inquiries.

For 2006, GVB hopes to generate

more publicity on Guam wedding chapels and attractions, to further strengthen Guam's positioning as the wedding paradise in the Hong Kong wedding market.

China

FY2002-2005

For the past four years, GVB's foremost marketing agenda in the Peoples Republic of China (including Hong Kong) has been to obtain the authority to grant Guam-only visa waivers to Chinese travelers, preferably affluent Chinese travelers! 'Guam-only' visa waivers would make it much easier to market 'Destination Guam' to Chinese citizens who now must sit and 'wait out' several days of visa security clearance before they can travel to Guam.

GVB sees China as the next big emerging market for Guam. Producing around 17 million tourists a year, China now rivals Japan's annual outbound travel numbers.

FY2002

By 2002, average expenditures for each Chinese citizen traveling abroad was no less than \$2,000. Based on this estimate, Chinese tourists were spending at a rate of over \$20 billion abroad each year, making it evermore critical for Guam to keep reaching out for market share.

Reflecting the importance of this emerging market to Guam's tourism industry, in March GVB won an Excellent Booth Award for its meticulously designed and carefully constructed exhibit at Guangzhou International Travel Fair 2002. During that same trip, then-Governor Carl TC Gutierrez signed a memorandum of understanding with the mayor of Guangzhou City at a ceremony attended by GVB member companies, Guam tourism industry players, and a Guam cultural performance group.

In a travel fair teeming with over 100 exhibitors and attended by 100,000 visitors (including about 3,000 travel trade), GVB captivated attendees of the Guangzhou expo with a unique and impressive cultural island show that drew the largest crowd to the performance stage. Equally impressive was GVB's double booth space showing off replicas of the Plaza de Espana's classic Spanish arches surrounded by images of Guam's reju-

venating optional tours and opulent tropical scenery. National tourist organizations, tour operators, travel agents, associations, national airlines, hotel chains, tourist attractions, car rental companies, airports, cruises, convention and business centers, travel necessities and other travel-related companies were all represented at Guangzhou.

Universally hailed as the one of the four most important travel fairs in the Pacific, Guangzhou International Travel Fair 2006 was organized by Guangdong Provincial Tourism Bureau and the Guangdong Municipal Tourism Bureau and was held at the Guangzhou Chinese Export Commodities Exhibition Hall. Covering an area of 10,000 square meters, the Exhibition Hall was divided into sections such as International Hall, Travel Services Special Hall, Airlines Hall, Clubs/Resorts Hall, Hotel Equipment Hall, Travel Foods Hall, Travel Commodities Hall, etc. And a special hall was provided to exhibit the activity of "Tour of Sports & Recreation, China, 2002".

FY2003

Twelve officials from the city of Liuzhou, in Guangxi province of the People's Republic of China visited Guam on February 10-17, 2003. Mayor Jidong Song led the delegation. The purpose of their visit was to formalize a sister city relationship with Guam as well as to inspect the island as a potential market for future investment. A Memorandum of Understanding on tourism was signed during a ceremony at GVB's main conference room on February 14.

During their visit, the delegation also paid courtesy visits to Gov. Felix P. Camacho, Speaker Ben Pangelinan, the Department of Agriculture, the University of Guam and the Guam Economic Development Authority.

Mayor Song stated that the MOU marked the beginning of a series of future government-sponsored trips to Guam by educators, businessmen and students from their city. Liuzhou, Guangxi is the largest industrial city in the southwest region of China and has an urban population of 736,000 with a province population of 45 million.

A delegation of ten officials from the

City of Dalian led by the Municipal People's Government Assistant Mayor, Ms. Sun Shiju, and Municipal Tourism Administration Director-General Mr. Liu Zhenwan, signed an "Agreement on Tourism Cooperation" with the Guam Visitors Bureau on Saturday, February 15, at the GVB office.

The Agreement vowed to develop and strengthen tourism exchange and cooperation between the two cities. The Dalian delegation is the third city of China with which Guam has established official ties.

Governor Camacho and First Lady JoAnn G. Camacho witnessed the official signing ceremony by Mr. Zhenwan Liu and Mr. Alberto "Tony" Lamorena V, GVB General Manager.

Dalian is the richest and most cosmopolitan city in Liaoning Province, China. The city has a population of 5.5 million. It is world-renown for hosting the Dalian International Fashion Festival, one of the largest international fashion shows in Asia.

After two postponed visits, the Shanghai Municipal Tourism Administration Commission finally visited Guam in March 2003 after an initial invitation by the previous Guam administration. The Shanghai delegation stayed at the Hilton Guam Resort & Spa and the Bureau hosted a luncheon and invited the GVB Board of Directors and Asia Marketing Committee to meet the honored guests.

FY2004

China International Travel Mart
(Nov 20-23)

Guangzhou International Travel Fair
(March)

FY2005

The opening of the Beijing International Travel & Tourism Market (BITTM) was sprawling with 150 top-tier exhibitors, 400 hosted buyers, 100 media and numerous VIP and dignitaries. The BITTM is China's only outbound tourism exhibition. Here, Guam was able to meet and greet with various Chinese outbound tour operators and travel agents searching for destinations and travel products to sell to the 1.3 billion Outbound Market.

Guam's delegation was headed by

Mr. Walter Dias, CAMC Chairman, alongside a 7-person GVB contingency with reps from Guam and Hong Kong. As part of the BITTM, GVB hosted an EXPAT seminar on April 23, 2005 at the Great Wall Sheraton, Beijing. There was an estimated 100 media representatives and travel agents in attendance.

GVB is progressively trying to establish visibility and presence in the Chinese market. Though China is currently not our forerunner in visitor arrivals to the island, it is a market which we hope to see grow rapidly as the cities of Beijing, Shanghai and Guangzhou continue to prosper.

The Grand Factory 798 Net-working night attended by an 8-person contingency from the Guam Visitors Bureau (GVB) was a phenomenal success. Organized by the Swiss Chamber on behalf of the Foreign National Chambers, the event held twice a year, proved to be an excellent opportunity for Guam to establish itself in the China market, while at the same time developing contacts from a round the globe. With over 900 guests in attendance from the twenty supporting chambers of commerce, the Networking night was a "shock and awe" experience for most of the participants. Unlike most functions, which are often held in various hotel ballrooms, the factory setting gave the night a unique and much appreciated twist. The original 798 Factory is located in the Dashanzi Art District, the heart of a growing art and culture community in Beijing. The mixer was supported by LG (Beijing) Twin Tower, The Marriott Group, Coca-Cola and many others. Participants were entertained with music by the Suzie Wong Club.

GVB, as a supporter of the event, donated a free 3-day trip to Guam. Sponsors of such prizes were announced during the event and received recognition and placement on the official publicity banners and media tools. The grand-prize winner, Ms. Erin Young of Dallas, Texas, said that she was still shaking after she learnt that her number was called for the prize.

From August 1-5, 2005, GVB and its industry partners hosted a China Media Familiarization Tour. The visit was part of an ongoing effort to promote Guam to the affluent experienced Chinese travelers

and expatriates. The media exposure for Guam was estimated at a value of \$80,000. Various directors, editors and photographers from China's top publications got to experience Guam's local gourmet, enticing water and land activities and cultural presentations. The group, which arrived early Tuesday morning, visited the various hotels, viewed their amenities and toured the sites such as Two Lovers Point, Latte Stone Park, Plaza de Espana, and many others.

China's outbound travel market has grown tremendously, 29 million in 2004, which is 43% more than the previous year.

Philippines

The Philippine market comprises a small percentage of GVB's overall marketing budget. And those marketing dollars fund certain events and promotions such as hole-in-one prize trips, media fam tours, and the annual TravelTour Expo. There is also a fair amount of earned media about Guam within the Philippine media. GVB's Philippine office also serves as a liaison facility for the Guam Medical Referral program.

FY2002-2004

From 2002 to 2004 GVB did not have a Philippine Representative office. GVB was present at the ETAA Travel Tour Expo. for all three years with a basic booth set-up and two staff.

FY2005

May 17, 2005, marked the official opening of the Guam Visitors Bureau (GVB) Philippines Marketing Representative office. Guam's delegation to the event was lead by Chairman David Tydingco, accompanied by then-General Manager - Mr. Tony Lamorena, Mr. Emilio Uy (VP-Phil Committee) and three other marketing representatives from the bureau. The guest speaker for the event was Senator Antonio Unpingco, Chairman of the Committee on Tourism, Maritime, Military & Veterans Affairs of the 28th Guam Legislature. The Senator, in his speech, focused on visa status and other immigration matters.

The Hafa Adai- Guam Reception was held at the Century Park Hotel, Manila. Continental and Philippine

Airlines were on hand to distribute flyers and present their Guam travel packages. Guests were greeted and entertained by Guam's own cultural dancers. During the event, GVB introduced Matua Agupa Corporation as the new Philippines Marketing Representative and also awarded the top five Guam Sales agents.

Skydiving, Scoot cars and the Jungle River Boat Cruise? What could these three possibly have in common, one might ask? Well, these are just a few of the activities that were featured by SPORTS UNLIMITED, a travel adventure and sports show that airs on Philippine ABS-CBN Channel 2. The group was on island to film two 30-minute segments featuring Guam - its sports activities, amenities, and other points of interest. Sports Unlimited airs nationwide every Saturday evening with 2 replays within the week on ANC (sister cable channel) 21 at Sky and 32 at Home. The program also airs worldwide over global cable channel TFC (The Filipino Channel) which is available wherever there are Filipinos: the US mainland, Australia, Canada, The Middle East, Japan, Hong Kong, Guam, Hawaii, and parts of Europe.

It is the first sports show of its kind in the country to combine adventure sports and travel, while featuring current sporting events, the latest in health and fitness trends, plus an up-close on sports personalities and other celebrities. The show boasts TV hosts Dianne Castillejo Garcia and Marc Saw Nelson. They were also joined by celebrity guests, Thea Frokjaer and Geoff Rodriguez.

The crew has traveled to almost all parts of the Philippines and has featured places like Amanpulo, The Badian Island Resort, Plantation Bay, The Shang-ri La (Cebu), Club Noah Isabelle, Club Paradise, Calauit (Palawan) and Panglaw Nature Resort (Bohol). Outside of the Philippines the group has also featured spots such as Palau, Kota Kinabalu, Macau, Spain, Maui, Australia, Thailand, Vietnam and Malaysia.

An estimated 175,000 to 200,000 TV households in Metro Manila view the show. Audience share of total viewers at its time slot averages from 25% to 40%.

North America / Armed Forces Marketing Committee

FY2002-FY2005

Being a small market for Guam, the North America/Armed Forces Marketing Committee receives much less funding and therefore focuses its attention on generating story ideas in key media and attending important trade shows to generate travel leads and nurture industry relationships.

North America and Armed Forces

FY2002

At DEMA 2002, the various Micronesia National Tourism offices jointly organized a highly active, busily attended, regional dive site pavilion. This pavilion served as the umbrella for 23 booths representing diving organizations throughout Micronesia. The pavilion was positioned in a good location and drew a lot of attention at DEMA – the largest dive show in the world! The pavilion marketed Micronesia as a veritable treasure trove of world-class dive sites.

To help build a database of dive enthusiasts and to help educate them about the region, GVB and other participants organized a stamp rally program and a paid Micronesia Seminar. The stamp rally required participants to visit all 23 Micronesia booths in exchange for incentives. The promotion generated enormous interest and participation. All Micronesia destinations participated in the \$10-per-person Micronesia Seminar, which attracted 85 attendees. Money generated from the seminar was earmarked to help offset future DEMA activities for the region.

Guam found the October 2002 DEMA show in Las Vegas agog with the latest rage in submersibles – digital underwater cameras. No stranger to underwa-

ter photography, GVB emailed Divers Magazine editors an invitation to stop by the Bureau's booth at the show. GVB was pursuing Guam and Micronesia's inclusion in Divers Magazine's map of 'the world's top diving destinations'. And the wooing worked!

FY2003

In May 2003 Divers Magazine editor Jeff Gourley sent a crew to cover diving in Micronesia and Guam. Divers Magazine is a high-quality publication for the dive enthusiast. Circulation is 150,000, with readership of 525,000. GVB members provided dive support and accommodations for the Guam visit.

In other earned media, GVB was included in the Los Angeles Times' February 2, 2003 list of state and US territory tourist offices. The list was published in the newspaper's local and national editions. Local edition circulation was 1,391,076 for a total advertising equivalency of \$2,780. National edition circulation was 20,000 for a total advertising equivalency of \$2,780. Total value of earned media was \$5,560.

FY2004

Story placement in 2004 promoted the commemoration of the 60th Anniversary of the Liberation of Guam. Content included stories about official events, the veterans who attended those events, plus general destination stories. The commemoration was covered by a diverse cross-section of media, including those read by the senior market, history enthusiasts, active and retired military, plus general leisure travelers.

One of the largest placements was a story by BJ Reyes of the Associated Press. GVB's North American PR firm, AVISO Marketing Communication, sent Mr. Reyes information and arranged an interview with one of



the Liberators visiting Guam on the day of the Liberation. The article appeared in publications across the country.

Freelance writer Norman Sklarewitz visited Guam in March to cover the 60th anniversary. His stories were published in Stars & Stripes, Copley News Service, and OAG/Frequent Flyer. Advertising equivalency for these stories was more than \$112,000.

Total advertising equivalency for all North American media exposure in FY2004 was \$623,597.

GVB and AVISO did place small space ads in military and other publications. For added exposure a standalone website was developed specifically for the 60th Anniversary. GVB also provided a lot of coordinating assistance and information sharing throughout the commemorative year.

Additionally, GVB and the Stars & Stripes newspaper joined into a cooperative advertising partnership with visitor industry partners to reach the military market through advertorials. Many GVB members signed up to participate in the co-op ad program. The campaign lasted throughout FY04.

Arrivals from North America remained strong in FY04, with an 8.6% increase over FY03. Factors affecting arrivals from North America and Hawaii -- such as the economy -- improved somewhat. Military activity in the Asia/Pacific region increased and there were no major national disasters in FY04.

FY2005

Sport Diver Magazine published a short article on a Guam photo gallery and recommended three books about natural Guam in FY05. The article touted Fish Eye Marine Park's new ocean photo gallery in Piti featuring the underwater images of internationally published photojournalist and Sport Diver contributor Tim Rock. The story showed a captioned photo of Rock standing in front of a row of framed prints he had taken of spinner dolphins.

In July Sport Diver recommended several of Tim Rock's Lonely Planet-brand books, including Diving & Snorkeling Guam & Yap, praising its easy-to-read maps and discriminating selection of premium dive sites. In August the magazine also recommended Danko Taborosi's Field Guide to

Caves and Karst of Guam as a single guide to hiking, diving, kayaking, caving and other outdoor activities as well as The Best Tracks on Guam by Dave and Bev Lotz.

"Georgia on my mind, God Bless the USA, and Funky Town" were just a few of the songs performed by the III Marine Expeditionary Force Band at the Micronesia Mall on July 20, 2005. This prelude to the Liberation Day festivities sponsored by the Guam Visitors Bureau and the Micronesia Mall, proved to be a great way to rally up the crowd and get the patriotic juices flowing. Veterans, family members of servicemen, locals, and tourists alike, applauded the group from beginning to end as they elicited much audience participation during their performance.

The Marine Band based out of Okinawa, Japan, provides musical support to the Pacific Region including Saipan, Guam, Korea, China, Australia and New Zealand. The group was formed in the early 1970's and is composed of the Wing Band and the 3rd Division Band. The ensemble consisting of 30 members was led by enlisted conductor, Roberto B. Leal, Gunnery Sergeant. The band is also broken down into various components such as the Party Band, the Brass Quintet, and the Show Band to name a few. They play an array of music from Dixieland to Patriotic and even Big Band tunes. The band was present during the Liberation Day parade to enliven the crowd and provide musical enjoyment for all parade watchers.

On August 16, GVB North America & Armed Forces Marketing Committee Chairman L. Carl Peterson gave the keynote speech at the unveiling of The Last Mission Monument at Northwest Field, Guam. The monument had been built to commemorate the landing of the 315th Bomb Wing upon its fateful return to American soil after destroying the last of Japan's oil reserves, the significance of the 315th's mission as America's last official act of war,

and the symbolism of that moment 60 years ago. The monument was also dedicated to other bomb wings involved in missions from the Marianas. Peterson announced that the 315th Association and other wings of the Marianas were already planning tours to this memorial in 2006.



Pacific / Micronesia Marketing Committee

FY2002-FY2005

Pacific

Being a member of the Pacific Asia Travel Association's Micronesia Chapter, GVB naturally includes Micronesia area promotions among its Pacific marketing programs. The intent of PATA Micronesia is to foster camaraderie between the islands of Micronesia and to encourage regional promotions at certain shows such as the Dive Equipment & Marketing Association's annual expositions (DEMA Shows).

FY2002

Due to the elimination of Pacific area marketing funding from the FY02 budget, GVB was unable to attend such important PATA meetings as the Annual Conference in New Delhi, India, the Travel Mart in Singapore, and the Micronesia Chapter's 3rd Quarterly meeting in Chuuk. However, the Bureau was able to participate in the Chapter's monthly teleconference calls to stay abreast of project updates. And Guam did host a PATA Micronesia Chapter Meeting in June. Appropriately enough, meeting activities included a 'crisis management' seminar.

At the beginning of this slow Pacific marketing period, GVB was thrilled to sponsor an October 2001 visit by a team of digital inventors when Guam was selected as a 'host site' for the developmental stages of a revolutionary new dive technology product called D-log. It was the first and only interactive dive logbook allowing a diver to use a modern internet-based logging technique (in addition to the traditional logging technique); making use of a "language" custom-made for scuba divers; utilizing schematic maps of dive sites and shipwrecks from a wide collection of dive site maps; and incorporating information on dive destinations worldwide. At the time Palau was the only other destination in

Micronesia that had been selected as a host for the development of this new technology.

In February GVB hosted an island familiarization tour for a group of 23 pax from Flight Center Management out of North Queensland, Australia. The Outrigger Guam Resort provided accommodations. During their tour of the island, the participants experienced Guamanian culture and hospitality firsthand, as tourists.

FY2003

Continued lack of funding hampered marketing to Pacific/Australia in FY03, with a couple of powerful exceptions in earned media and outreach campaigns.

With help from Discover Guam, Outrigger Guam Resort, and Continental Airlines, Guam procured an audience of more than 2.5 million television viewers when The Great Outdoors production crew videotaped footage on island in February 2003. Among Australia's most popular travel programs, Channel 7's The Great Outdoors is hosted by one of that nation's best-recognized and most beloved TV personalities, Ernie Dingo. The programming promotes tour and travel by showing viewers "how to get there", where to stay and what to do. GVB helped clear the crew and talent through Guam Customs and Quarantine Agency by notifying them in advance of the visit. Just before videotaping its Guam adventure, the television show recorded material in Pohnpei, Yap,

Palau and Saipan. When The Great Outdoors came to Micronesia in 2003, the hit TV weekly was already in its 11th season.

More Australia outreach came in June when GVB conducted the Queensland, Australia Travel Trade Fam Tour of Guam with Continental Airlines and Outrigger Guam Resort.



FY2004

The Annual PATA Conference was held on April 17-22, 2004 in Jeju, Korea. GVB Chairman of the Board, David Tydingco, Marketing officer II, Gina Kono, Research Manager, Debi Phillips, and GVB Korea Representative, Kyong-Hae, Kim attended the event. The conference was held at the International Conference Center, Jeju. The overall theme for the conference was "Tourism is Everybody's Business." The objective of the conference was to underline the increasing social, economic and cultural importance of tourism to the many diverse sectors of the global economy. Over the course of the conference various sessions were held covering topics such as "Aviation, Challenges for Sustainable Tourism, Pacific Asia Tourism - then and now and Reputation Management."

FY2005

The 54th PATA Annual Conference was held in Macau from April 17-21, 2005. A total of fourteen representatives came from Guam, CNMI, FSM, and Palau. GVB Board Chairman, David Tydingco, Marketing Manager, Pilar Laguana, and Research Manager, Debi Phillips made up the Guam delegation. Macau had been planning for the annual conference for over a year and 2005 would have been the first time for the country to host the event. The conference attracted over 1,200 delegates from all over the world. The Opening Ceremony was held in the Macau Tower and the Welcome Address given by Dr. Chui Sai On, Secretary for Social Affairs and Culture of the Government of Macau Special Administrative Region.

At the opening of the conference PATA's President and CEO, Peter de Jong spoke about the media's role in the recent Asian events such as SARS and the tsunami that effected the south Asian region. PATA's Key Note address, "Connecting Tourism's Stakeholders," was given by Director General

and CEO of IATA, Mr. Giovanni Bisignani. Mr. Bisignani outlined key points of what the industry should do to improve and how crisis cure is not as good as crisis anticipation. He advised PATA delegates that air transport has to become a "low-cost" industry and went on to give examples of current rising fuel prices and the growth in demand of low-cost carriers, which have diversified the skies with more inexpensive travel options for the traveler.

The Guam Visitors Bureau was in Rota and Saipan to launch the "Bisita Marianas" campaign. A joint promotional program between the Guam Visitors Bureau and Marianas Visitors Authority, the program's goal was to foster, encourage and promote inter-island travel between the islands of Saipan, Tinian, Rota, Palau, the FSM, Marshall Islands and the Marianas (including Guam).

The campaign hoped to encourage travel by residents of the CNMI and Guam for business, educational, leisure/recreational sports activities and friendship exchanges. Every year, Guam receives roughly 30,000 in visitor arrivals from the inter-islands. The projected goal was to increase visitor arrivals by 10% in 2005.

Using special islander air travel packages that were already in place, Guam's tourist/hospitality businesses complemented these air packages with either existing local offers or specially formulated

incentives valid 12 months for year-round travel. Offers and attractions from participating companies were collected and compiled into a promotional flyer, and were distributed around the CNMI and Guam. "Don't take your license for Granted, Take it for Savings!" was the slogan which was adopted for the campaign. With the presentation of a CMNI I.D. or passport, visitors were able to avail of various food, hotel, car rental and other retail discounts.





(L-R) Ana Cid, Celia Dydasco, Debi Basa-Phillips

RESEARCH FY2002-FY2005

On August 20, 1990, Public Law 20-205 was signed, establishing a Research Department within the Guam Visitors Bureau. The Department was given the responsibility of “working with other entities to collect, analyze, and evaluate pertinent data on the visitor industry and to disseminate comprehensive statistics and other data on a monthly, quarterly and yearly basis.” Projects enumerated in the initial budget included exit surveys as well as monthly, quarterly and annual reports. The reports, surveys and studies produced by the Department are regularly provided to GVB members as a benefit of membership.

In the fifteen years since its creation, the GVB Research Department has continued to implement the core projects outlined in its enabling legislation by producing nearly 200 statistical reports, conducting and issuing information more than 100 exit surveys that scrutinized responses of visitors from five different markets; producing reports on the visitor industry labor market; and analyzing data obtained from the arrival forms filled out by visitors.

Since 1990, the Department has compiled numerous annual inventory reports on accommodations, optional tours, and recreational facilities; produced marketing effectiveness studies regarding performance in Japan, Korea, and

Taiwan; made forecasts and projected arrivals and occupancy rates; and developed market share analyses vital to the Bureau’s marketing strategies.

The Research Department assumed the duty of processing the customs forms filled out by each traveller to Guam in June 2000. For a number of years the Bureau had been providing maintenance for the equipment used to scan the customs forms and produce statistical printouts, while the actual sorting and scanning had been conducted by the Guam Department of Commerce (DOC). By bringing the customs forms scanning in-house, the Research Department has been able to more quickly and accurately count arrivals and produce statistical data regarding Guam’s visitors.

Among the Fiscal Year 2005 monthly exit surveys conducted by the Department at the A.B. Won Pat International Airport Terminal departure area, twelve were of Japanese visitors and 5 were of Korean visitors. These surveys provided a very valuable “snapshot” of visitors’ perceptions while in Guam. The profile of the visitors supplies a wealth of information, including reasons for coming to Guam, length of their stay, and a rating of facilities and attractions. The profiles of visiting Japanese and Koreans are provided on the following pages.

Fiscal Year Arrivals • Air & Sea

	<u>Total Air</u>	<u>Total Sea</u>	<u>Total Air & Sea</u>	<u>% CHG LY</u>
FY2002	990,610	23,427	1,014,037	-21%
FY2003	810,150	46,781	856,931	-15%
FY2004	1,112,231	43,968	1,156,199	35%
FY2005	1,165,149	44,998	1,210,147	5%

Fiscal Year Arrivals • Monthly

	<u>FY2002</u>	<u>FY2003</u>	<u>FY2004</u>	<u>FY2005</u>	<u>% Chg LY</u>
October	47,213	88,712	83,254	86,057	3.4%
November	56,659	95,441	97,489	91,155	-6.5%
December	73,563	37,949	93,934	101,147	7.7%
January	84,361	57,826	101,809	114,446	12.4%
February	91,749	84,739	112,053	109,628	-2.2%
March	100,077	68,269	97,433	103,785	6.5%
April	75,597	57,325	79,556	88,602	11.4%
May	94,004	61,175	86,704	92,472	6.7%
June	88,233	50,872	87,298	97,951	12.2%
July	88,188	73,150	102,463	115,136	12.4%
August	111,182	86,577	113,611	109,465	-3.6%
<u>September</u>	<u>103,211</u>	<u>94,896</u>	<u>100,595</u>	<u>100,303</u>	<u>-0.3%</u>
TOTAL	1,014,037	856,931	1,156,199	1,210,147	4.4%

Source: Customs Declaration Forms, Customs & Quarantine Agency
 Processed and compiled by the GVB Research Department
 Military air & sea arrivals are included appropriately. Detailed breakdown available upon request.

Fiscal Year Arrivals • By Country

	<u>FY2002</u>	<u>FY2003</u>	<u>FY2004</u>	<u>FY2005</u>	<u>% Chg LY</u>
Japan	751,506	606,100	897,046	938,731	4.6%
Korea	121,185	94,429	92,559	104,844	13.3%
Taiwan, R.O.C.	21,317	17,576	24,471	23,048	-5.8%
US Mainland	31,669	33,870	35,885	38,035	6.0%
Hawaii	8,423	8,008	8,907	9,115	2.3%
CNMI	20,280	17,817	18,978	18,622	-1.9%
Palau	3,334	3,109	3,353	3,530	5.3%
FSM	7,802	9,500	8,715	8,334	-4.4%
RMI	752	681	818	912	11.5%
Philippines	6,427	6,381	7,135	6,598	-7.5%
Australia	1,703	1,900	2,663	2,741	2.9%
Canada	1,424	547	582	514	-11.7%
Europe	1,361	1,361	1,432	1,737	21.3%
Hong Kong	8,893	5,054	5,150	4,293	-16.6%
Nauru	14	6	14	5	-64.3%
Thailand	242	219	272	161	-40.8%
China, PRC	1,284	733	827	867	4.8%
Vietnam	53	27	38	31	-18.4%
<u>Other</u>	<u>2,941</u>	<u>2,832</u>	<u>3,386</u>	<u>3,031</u>	<u>-10.5%</u>
Total Air	990,610	810,150	1,112,231	1,165,149	
Total Sea	23,427	46,781	43,968	44,998	
Total Air & Sea	1,014,037	856,931	1,156,199	1,210,147	
% CHG over LY	-21%	-15%	35%	5%	

Japan Visitor Arrivals • By Region

FY 2005	Kanto	Chubu	Kinki	Tohoku	Kyushu	Chugoku	Hokkaido	Okinawa/			
	(Tokyo)	(Nagoya)	(Osaka)	(Sendai)	(Fukuoka)	(Hiroshima)	(Sapporo)	Shikoku	Miya	Other	TOTAL
October	36,441	11,672	12,171	2,076	2,610	2,075	1,482	1,054	277	303	70,161
November	36,697	11,738	13,279	2,646	2,979	2,573	1,734	1,206	188	256	73,296
December	38,793	13,396	14,349	3,047	2,821	3,132	1,835	1,530	127	306	79,336
1st Quarter	111,931	36,806	39,799	7,769	8,410	7,780	5,051	3,790	592	865	222,793
January	43,639	14,798	15,228	3,819	2,994	2,604	4,473	991	149	282	88,977
February	40,305	14,062	14,052	2,882	2,802	2,087	3,025	1,198	154	388	80,955
March	42,073	15,513	15,054	2,634	3,183	2,362	2,641	1,188	253	382	85,283
2nd Quarter	126,017	44,373	44,334	9,335	8,979	7,053	10,139	3,377	556	1,052	255,215
April	33,951	11,489	11,913	2,583	2,711	2,250	1,626	1,074	244	356	68,197
May	33,689	12,081	13,708	2,509	2,888	2,767	1,759	1,334	307	235	71,277
June	37,763	11,593	12,740	2,444	2,409	2,226	1,717	1,170	236	599	72,897
3rd Quarter	105,403	35,163	38,361	7,536	8,008	7,243	5,102	3,578	787	1,190	212,371
July	41,153	12,221	15,019	2,366	2,417	2,454	1,341	1,171	299	458	78,899
August	45,157	12,926	15,792	1,974	2,696	2,816	1,284	1,029	140	283	84,097
September	45,066	14,392	14,569	2,418	2,558	2,938	1,734	1,037	340	304	85,356
4th Quarter	131,376	39,539	45,380	6,758	7,671	8,208	4,359	3,237	779	1,045	248,352
FY 2005 Total	474,727	155,881	167,874	31,398	33,068	30,284	24,651	13,982	2,714	4,152	938,731

FY 2004	Kanto	Chubu	Kinki	Tohoku	Kyushu	Chugoku	Hokkaido	Okinawa/			
	(Tokyo)	(Nagoya)	(Osaka)	(Sendai)	(Fukuoka)	(Hiroshima)	(Sapporo)	Shikoku	Miya	Other	TOTAL
October	34,681	10,088	11,462	2,515	2,291	1,673	1,485	910	228	268	65,601
November	36,940	11,304	13,833	2,902	2,956	2,385	1,792	1,151	436	399	74,098
December	35,347	12,647	13,813	3,002	2,563	2,673	2,027	1,499	170	293	74,034
1st Quarter	34,681	10,088	11,462	2,515	2,291	1,673	1,485	910	228	268	213,733
January	39,841	12,654	14,509	2,922	2,383	2,028	3,677	1,065	205	356	79,640
February	38,199	13,400	13,445	2,870	3,102	2,768	2,117	1,073	259	402	77,635
March	37,816	16,148	13,707	2,571	3,264	2,506	2,649	1,270	220	264	80,415
2nd Quarter	115,856	42,202	41,661	8,363	8,749	7,302	8,443	3,408	684	1,022	237,690
April	29,950	10,702	11,691	2,656	2,568	1,954	1,629	861	175	238	62,424
May	31,962	12,836	13,488	2,301	2,818	2,474	1,467	1,036	179	326	68,887
June	36,124	11,090	11,033	2,251	2,791	1,882	1,416	943	340	287	68,157
3rd Quarter	98,036	34,628	36,212	7,208	8,177	6,310	4,512	2,840	694	851	199,468
July	39,814	12,152	15,529	2,103	2,819	2,180	1,525	1,092	420	373	78,007
August	45,207	12,544	16,307	2,111	2,698	2,971	1,410	1,277	234	386	85,145
September	42,715	15,960	13,681	2,295	3,074	2,047	1,534	1,177	221	299	83,003
4th Quarter	127,736	40,656	45,517	6,509	8,591	7,198	4,469	3,546	875	1,058	246,155
FY 2004 Total	376,309	127,574	134,852	24,595	27,808	22,483	18,909	10,704	2,481	3,199	897,046

Japan Visitor Arrivals • By Region

FY 2003	Kanto	Chubu	Kinki	Tohoku	Kyushu	Chugoku	Hokkaido	Okinawa/			
	(Tokyo)	(Nagoya)	(Osaka)	(Sendai)	(Fukuoka)	(Hiroshima)	(Sapporo)	Shikoku	Miya	Other	TOTAL
October	31,833	10,813	12,235	2,343	3,001	2,187	1,778	1,234	344	482	66,250
November	34,675	11,264	13,087	2,292	2,666	1,861	2,123	1,243	203	245	69,659
December	11,509	4,008	4,231	1,080	1,133	794	775	550	86	165	24,331
1st Quarter	78,017	26,085	29,553	5,715	6,800	4,842	4,676	3,027	633	892	160,240
January	20,344	7,030	7,308	1,726	1,499	1,113	1,916	771	127	232	42,066
February	25,712	9,295	10,406	1,916	2,272	1,576	2,171	1,068	95	165	54,676
March	24,609	9,298	10,877	1,852	1,831	1,536	1,570	879	144	238	52,834
2nd Quarter	70,665	25,623	28,591	5,494	5,602	4,225	5,657	2,718	366	635	149,576
April	17,494	5,347	5,948	1,041	1,500	938	791	482	215	283	34,039
May	15,984	4,517	6,351	892	1,363	977	769	408	114	222	31,597
June	18,647	3,692	6,114	1,292	1,217	1,070	766	485	304	178	33,765
3rd Quarter	52,125	13,556	18,413	3,225	4,080	2,985	2,326	1,375	633	683	99,401
July	28,686	6,645	10,410	1,235	1,482	1,059	1,044	720	306	270	51,857
August	36,565	8,337	11,986	1,688	1,902	1,813	986	914	114	215	64,520
September	42,883	12,517	15,090	2,265	2,381	2,219	1,622	1,059	212	258	80,506
4th Quarter	108,134	27,499	37,486	5,188	5,765	5,091	3,652	2,693	632	743	196,883
FY 2003 Total	308,941	92,763	114,043	19,622	22,247	17,143	16,311	9,813	2,264	2,953	606,100

FY 2002	Kanto	Chubu	Kinki	Tohoku	Kyushu	Chugoku	Hokkaido	Okinawa/			
	(Tokyo)	(Nagoya)	(Osaka)	(Sendai)	(Fukuoka)	(Hiroshima)	(Sapporo)	Shikoku	Miya	Other	TOTAL
October	15,694	5,546	5,770	1,340	1,516	1,256	780	723	217	209	33,051
November	17,682	5,754	6,720	2,151	2,054	1,143	1,555	644	188	201	38,092
December	24,133	8,066	10,706	2,687	2,633	1,802	1,604	1,255	401	369	53,656
1st Quarter	57,509	19,366	23,196	6,178	6,203	4,201	3,939	2,622	806	779	124,799
January	25,747	10,433	13,451	2,693	2,564	1,994	3,772	1,130	449	376	62,609
February	28,152	11,553	15,689	2,715	3,084	2,201	3,226	1,272	332	257	68,481
March	32,712	13,235	18,957	2,870	3,375	2,670	3,194	1,623	318	333	79,287
2nd Quarter	86,611	35,221	48,097	8,278	9,023	6,865	10,192	4,025	1,099	966	210,377
April	23,846	9,498	10,772	2,089	2,246	1,848	1,411	1,049	304	365	53,428
May	29,362	10,939	12,484	2,206	2,591	2,130	1,306	1,134	217	346	62,715
June	32,398	10,542	11,891	2,076	3,058	2,203	1,456	1,005	332	240	65,201
3rd Quarter	85,606	30,979	35,147	6,371	7,895	6,181	4,173	3,188	853	951	181,344
July	32,952	10,092	13,936	2,072	2,163	1,754	1,379	1,254	203	250	66,055
August	40,480	12,731	17,864	2,651	2,872	2,743	1,230	1,557	290	369	82,787
September	42,988	13,001	17,048	2,783	3,647	2,580	1,973	1,581	263	280	86,144
4th Quarter	116,420	35,824	48,848	7,506	8,682	7,077	4,582	4,392	756	899	234,986
FY 2002 Total	346,146	121,390	155,288	28,333	31,803	24,324	22,886	14,227	3,514	3,595	751,506

Guam's Marketshare of Japan Travelers

	FY2002	Guam	Guam	FY2003	Guam	Guam	FY2004	Guam	Guam	FY2005	Guam	Guam
	JOT ¹	Pax ²	MS ³	JOT ¹	Pax ²	MS ³	JOT ¹	Pax ²	MS ³	JOT ¹	Pax ²	MS ³
October	925,142	33,051	3.57%	1,483,874	66,250	4.46%	1,295,142	65,601	5.07%	1,556,712	70,161	4.51%
November	860,698	38,092	4.43%	1,396,561	69,659	4.99%	1,259,963	74,098	5.88%	1,484,702	73,296	4.94%
December	1,037,934	53,656	5.17%	1,392,127	24,331	1.75%	1,327,133	74,034	5.58%	1,425,000	79,336	5.57%
1st Quarter	2,823,774	124,799	4.42%	4,272,562	160,240	3.75%	3,882,238	213,733	5.51%	4,466,414	222,793	4.99%
January	1,125,330	62,609	5.56%	1,262,094	42,066	3.33%	1,189,547	79,640	6.69%	1,453,740	88,977	6.12%
February	1,193,791	68,481	5.74%	1,318,859	54,676	4.15%	1,256,253	77,635	6.18%	1,374,771	80,955	5.89%
March	1,434,275	79,287	5.53%	1,256,784	52,834	4.20%	1,312,696	80,415	6.13%	1,533,379	85,283	5.56%
2nd Quarter	3,753,396	210,377	5.60%	3,837,737	149,576	3.90%	3,758,496	237,690	6.32%	4,361,890	255,215	5.85%
April	1,240,563	53,428	4.31%	719,127	34,039	4.73%	1,208,082	62,424	5.17%	1,329,301	68,197	5.13%
May	1,279,403	62,715	4.90%	567,832	31,597	5.56%	1,269,328	68,887	5.43%	1,261,561	71,277	5.65%
June	1,244,200	65,201	5.24%	662,259	33,765	5.10%	1,350,207	68,157	5.05%	1,355,480	72,897	5.38%
3rd Quarter	3,764,166	181,344	4.82%	1,949,218	99,401	5.10%	3,827,617	199,468	5.21%	3,946,342	212,371	5.38%
July	1,420,406	66,055	4.65%	973,241	51,857	5.33%	1,468,142	78,007	5.31%	1,422,240	78,899	5.55%
August	1,668,593	82,787	4.96%	1,295,385	64,520	4.98%	1,676,206	85,145	5.08%	1,634,053	84,097	5.15%
September	1,643,681	86,144	5.24%	1,358,511	80,506	5.93%	1,639,445	83,003	5.06%	1,634,365	85,356	5.22%
4th Quarter	4,732,680	234,986	4.97%	3,627,137	196,883	5.43%	4,783,793	246,155	5.15%	4,690,658	248,352	5.29%
FY TOTAL	15,074,016	751,506	4.99%	13,686,654	606,100	4.43%	16,252,144	897,046	5.52%	17,465,304	938,731	5.38%

¹ Japan Overseas Travellers. Source: Ministry of Justice, Japan. Compiled by the Japan National Tourist Organization

²Guam's Pax, Source: Customs Declaration Forms, Customs & Quarantine Agency, Compiled by the Guam Visitors Bureau

³Guam Market Share

FY2005 Japan Visitor Profile

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness with the respondent present.
- A total of 4,428 departing Japanese visitors (October 2004~September 2005) were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of 4,428 is +/- 1.47 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 1.47 percentage points.

Marital Status

Married	35%
Single	65%

Overall Age

Less than 20 years	4%
20~29 years	60%
30~39 years	24%
40~49 years	8%
50+ years	5%

Personal Income

Less than ¥3M	34%
¥3M~¥3.9M	18%
¥4M~¥4.9M	12%
¥5M~¥6.9M	10%
¥7M~¥9.9M	5%
¥10M+	4%
No income/unspecified	18%

Travel Companions

Friends	57%
With Spouse	16%
With Office Mates	13%
With Family	12%
With Children	6%
Travelled Alone	1%
Other	1%

First Timers/Repeaters

First Trip	71%
Repeat Visitor	29%
Repeat Visitors Last Trip:	
Within the last year	23%
1 to 2 years ago	20%
2 or more years ago	57%

Gender

Male	50%
Female	50%

Average Length of Stay

1~2 nights	9%
3 nights	84%
4+ nights	7%

Travel Planning

Full tour package	14%
Free-time package tours	74%
Individually arranged travel	5%
Group Tour	7%

Travel Motivation	Reason	Most Important
Beaches, seas, climate	47%	14%
Pleasure	41%	14%
Short travel time	29%	8%
Relaxation	29%	8%
Shopping	29%	5%
Price	29%	9%
Prior trip	25%	9%
Watersports	15%	3%
Recommendation	13%	4%
Company trip	11%	8%

Expenditures Per Person (mean average)

Prepaid	\$600.70
On-Island	\$675.56

Source: FY2005 GVB Japan FY2005 Data Aggregation Report.
Fieldwork and analysis by QMark Research & Polling

Korean Visitor Arrivals • By Region

FY 2005	Seoul	Pusan	Taegu	Inchon	Kwangju	Taejon	Other	TOTAL
October	2,997	180	88	303	50	68	858	4,544
November	4,194	278	172	429	88	106	1,332	6,599
December	5,072	300	214	353	152	181	1,249	7,521
1st Quarter	12,263	758	474	1,085	290	355	3,439	18,664
January	7,428	1,893	953	674	322	326	2,989	14,585
February	6,003	934	376	345	223	280	1,675	9,836
March	3,981	308	236	390	134	235	1,300	6,584
2nd Quarter	17,412	3,135	1,565	1,409	679	841	5,964	31,005
April	4,967	932	255	377	134	274	1,702	8,641
May	4,960	1,196	347	480	151	219	1,829	9,182
June	4,820	368	239	370	103	187	1,273	7,360
3rd Quarter	14,747	2,496	841	1,227	388	680	4,804	25,183
July	6,697	848	408	456	130	284	1,832	10,655
August	8,516	1,058	514	488	162	396	2,469	13,603
September	3,786	207	214	313	91	124	999	5,734
4th Quarter	18,999	2,113	1,136	1,257	383	804	5,300	29,992
FY 2005 Total	63,421	8,502	4,016	4,978	1,740	2,680	19,507	104,844

FY 2004	Seoul	Pusan	Taegu	Inchon	Kwangju	Taejon	Other	TOTAL
October	3,848	384	236	398	108	164	1,026	6,164
November	5,324	332	222	399	109	163	1,229	7,778
December	4,687	440	269	304	144	198	1,315	7,357
1st Quarter	13,859	1,156	727	1,101	361	525	3,570	21,299
January	6,000	417	268	601	218	314	1,746	9,564
February	7,467	672	450	547	284	336	2,367	12,123
March	3,839	257	174	453	116	134	905	5,878
2nd Quarter	17,306	1,346	892	1,601	618	784	5,018	27,565
April	3,849	277	130	261	110	134	929	5,690
May	3,944	307	227	235	103	105	1,049	5,970
June	3,558	331	216	299	73	189	890	5,556
3rd Quarter	11,351	915	573	795	286	428	2,868	17,216
July	5,597	463	515	362	159	211	1,450	9,757
August	6,898	572	364	536	189	233	1,966	10,758
September	4,037	272	155	248	82	124	1,046	5,964
4th Quarter	17,532	1,307	1,034	1,146	430	568	4,462	26,479
FY 2004 Total	60,048	4,724	3,226	4,643	1,695	2,305	15,918	92,559

Korean Visitor Arrivals • By Region

FY 2003	Seoul	Pusan	Taegu	Inchon	Kwangju	Taejon	Other	TOTAL
October	3,848	384	236	398	108	164	1,026	11,114
November	5,324	332	222	399	109	163	1,229	13,541
December	4,687	440	269	304	144	198	1,315	3,732
1st Quarter	13,859	1,156	727	1,101	361	525	3,570	28,387
January	4,180	383	242	357	147	181	990	6,480
February	5,579	399	308	459	182	150	1,476	8,553
March	3,764	287	181	475	106	146	894	5,853
2nd Quarter	13,523	1,069	731	1,291	435	477	3,360	20,886
April	3,066	350	225	330	152	109	880	5,112
May	4,565	373	198	333	96	151	866	6,582
June	4,576	470	190	332	84	164	924	6,740
3rd Quarter	12,207	1,193	613	995	332	424	2,670	18,434
July	,460	567	348	386	114	199	1,324	9,398
August	7,154	1,381	511	529	146	219	1,599	11,539
September	3,789	369	227	281	92	114	913	5,785
4th Quarter	17,403	2,317	1,086	1,196	352	532	3,836	26,722
FY 2003 Total	56,992	5,735	3,157	4,583	1,480	1,958	13,436	94,429

FY 2002	Seoul	Pusan	Taegu	Inchon	Kwangju	Taejon	Other	TOTAL
October	3,556	141	192	285	97	139	779	5,189
November	4,866	354	239	538	192	188	1,039	7,416
December	5,938	305	250	485	180	120	1,382	8,660
1st Quarter	14,360	800	681	1,308	469	447	3,200	21,265
January	4,180	383	242	357	147	181	990	10,737
February	5,579	399	308	459	182	150	1,476	12,117
March	3,764	287	181	475	106	146	894	9,420
2nd Quarter	13,523	1,069	731	1,291	435	477	3,360	32,274
April	3,066	350	225	330	152	109	880	10,487
May	4,565	373	198	333	96	151	866	11,131
June	4,576	470	190	332	84	164	924	11,601
3rd Quarter	12,207	1,193	613	995	332	424	2,670	33,219
July	,460	567	348	386	114	199	1,324	10,397
August	7,154	1,381	511	529	146	219	1,599	15,653
September	3,789	369	227	281	92	114	913	8,377
4th Quarter	17,403	2,317	1,086	1,196	352	532	3,836	34,427
FY 2002 Total	57,493	5,379	3,111	4,790	1,588	1,880	13,066	121,185

Guam's Marketshare of Korea Travelers

	FY 2002	Guam	Guam	FY 2003	Guam	Guam	FY 2004	Guam	Guam	FY 2005	Guam	Guam
	KOT ¹	Pax ²	MS ³	KOT ¹	Pax ²	MS ³	KOT ¹	Pax ²	MS ³	KOT ¹	Pax ²	MS ³
October	444,839	5,189	1.17%	605,926	11,114	1.83%	648,368	6,164	0.95%	757,538	4,544	0.60%
November	483,903	7,416	1.53%	580,686	13,541	2.33%	640,191	7,778	1.21%	745,887	6,599	0.88%
December	522,656	8,660	1.66%	559,489	3,732	0.67%	617,180	7,357	1.19%	725,697	7,521	1.04%
1st Quarter	1,451,398	21,265	1.47%	1,746,101	28,387	1.63%	1,905,739	21,299	1.12%	2,229,122	18,664	0.84%
January	629,077	10,737	1.71%	742,059	6,480	0.87%	793,478	9,564	1.21%	897,406	14,585	1.63%
February	513,320	12,117	2.36%	621,505	8,553	1.38%	670,447	12,123	1.81%	745,998	9,836	1.32%
March	547,042	9,420	1.72%	519,583	5,853	1.13%	587,629	5,878	1.00%	707,058	6,584	0.93%
2nd Quarter	1,689,439	32,274	1.91%	1,883,147	20,886	1.11%	2,051,554	27,565	1.34%	2,350,462	31,005	1.32%
April	575,481	10,487	1.82%	339,376	5,112	1.51%	642,413	5,690	0.89%	762,096	8,641	1.13%
May	549,024	11,131	2.03%	360,293	6,582	1.83%	680,185	5,970	0.88%	802,497	9,182	1.14%
June	538,110	11,601	2.16%	483,965	6,740	1.39%	712,260	5,556	0.78%	864,057	7,360	0.85%
3rd Quarter	1,662,615	33,219	2.00%	1,183,634	18,434	1.56%	2,034,858	17,216	0.85%	2,428,650	25,183	1.04%
July	724,788	10,397	1.43%	729,337	9,398	1.29%	897,234	9,757	1.09%	1,020,757	10,655	1.04%
August	773,908	15,653	2.02%	793,315	11,539	1.45%	930,573	10,758	1.16%	1,069,400	13,603	1.27%
September	526,556	8,377	1.59%	591,151	5,785	0.98%	682,244	5,964	0.87%	785,549	5,734	0.73%
4th Quarter	2,025,252	34,427	1.70%	2,113,803	26,722	1.26%	2,510,051	26,479	1.05%	2,875,706	29,992	1.04%
FY TOTAL	6,828,704	121,185	1.77%	6,926,685	94,429	1.36%	8,502,202	92,559	1.09%	9,883,940	104,844	1.06%

1 Korea Overseas Travellers. Source: Korea National Tourist Organization

2Guam's Pax, Source: Customs Declaration Forms, Customs & Quarantine Agency

3 Guam Market Share

FY2005 Korea Visitor Profile

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, Market Research & Development's professional Korean speaking interviewers double-checked each questionnaire for consistency and completeness with the respondent present.
- A total of 901 departing Korean visitors (July~September) were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of 901 is +/- 3.3 percentage points with a 95% confidence level. That is, if all Korean visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 3.3 percentage points.

Marital Status

Married	82%
Single	18%

Overall Age

Less than 20 years	0%
20~29 years	22%
30~39 years	52%
40~49 years	22%
50+ years	5%

Personal Income

Less than KW1.0M	1%
KW1.0M~KW1.9M	13%
KW2.0M~KW2.9M	20%
KW3.0M~KW3.9M	18%
KW4.0M~KW4.9M	11%
KW5.0M~KW5.9M	10%
KW6.0M+	17%
No income/unspecified	11%

Travel Companions

Friends	13%
With Spouse	73%
With Office Mates	6%
With Family	14%
With Children 18 or younger	43%
Travelled Alone	3%
Other	1%

First Timers/Repeaters

First Trip	86%
Repeat Visitor	14%
Repeat Visitors Last Trip:	
Within the last year	36%
1 to 2 years ago	18%
2 or more years ago	46%

Gender

Male	55%
Female	45%

Average Length of Stay

1~2 nights	8%
3 nights	81%
4+ nights	11%

Travel Planning

Full tour package	70%
Free-time package tours	17%
Individually arranged travel	9%
Group Tour	4%

Travel Motivation	Reason	Most Important
Beaches, seas, climate	47%	14%
Beaches, seas, climate	30%	7%
Pleasure	5%	1%
Short travel time	19%	4%
Relaxation	70%	48%
Shopping	3%	0%
Price	2%	0%
Prior trip	7%	2%
Watersports	10%	3%
Recommendation	11%	4%
Company trip	2%	1%
Honeymoon	12%	12%
Safe Destination	23%	6%
Career Certification	2%	2%

Expenditures Per Person (mean average)

Prepaid	\$966
On-Island	\$370

Source: FY2005 GVB Korea Exit Surveys. Fieldwork and analysis by Market Research & Development

Taiwan Visitor Arrivals • By Region

FY2005	Taipei	Kaohsiung	Taichung	Taoyuan	Miaoli	Hsinehu	Other	TOTAL
October	1,237	76	127		125		110	1,675
November	978	58	75		77		58	1,246
December	811	55	97		170		55	1,188
1st Quarter	3,026	189	299		372		223	4,109
January	1,437	90	123		145		95	1,890
February	2,415	138	231		296		118	3,198
March	1,077	123	127		99		63	1,489
2nd Quarter	4,929	351	481		540		276	6,577
April	995	95	56		66		40	1,252
May	1,452	76	80		190		97	1,895
June	1,690	124	181		179		117	2,291
3rd Quarter	4,137	295	317		435		254	5,438
July	2,164	165	237		380		259	3,205
August	1,631	112	114		213		144	2,214
September	1,101	77	88		169		70	1,505
4th Quarter	4,896	354	439		762		473	6,924
FY2005 Total	16,988	1,189	1,536		2,109		1,226	23,048

FY2004	Taipei	Kaohsiung	Taichung	Taoyuan, Miaoli, Hsinehu		Other	TOTAL
October	1,278	72	145		130	55	1,680
November	728	58	111		70	62	1,029
December	1,223	140	148		109	94	1,714
1st Quarter	3,229	270	404		309	211	4,423
January	2,020	135	297		405	119	2,976
February	1,278	118	99		195	96	1,786
March	1,127	121	177		145	113	1,683
2nd Quarter	4,425	374	573		745	328	6,445
April	1,076	89	118		146	114	1,543
May	1,478	113	103		171	126	1,991
June	1,888	148	168		140	96	2,440
3rd Quarter	4,442	350	389		457	336	5,974
July	1,944	132	215		295	214	2,800
August	1,929	153	160		263	192	2,697
September	1,557	134	109		207	125	2,132
4th Quarter	5,430	419	484		765	531	7,629
FY2004 Total	17,526	1,413	1,850		2,276	1,406	24,471

Taiwan Visitor Arrivals • By Region

FY2003	Taipei	Kaohsiung	Taichung	Taoyuan	Miaoli	Hsinehu	Other	TOTAL
October	1,128	78	96		122		60	1,484
November	781	84	48		74		47	1,034
December	808	0	0		0		0	808
1st Quarter	2,717	162	144		196		107	3,326
January	1,008	83	80		118		87	1,376
February	1,848	150	245		268		119	2,630
March	652	48	20		55		40	815
2nd Quarter	3,508	281	345		441		246	4,821
April	526	67	61		40		41	735
May	446	35	47		27		33	588
June	779	55	86		75		88	1,083
3rd Quarter	1,751	157	194		142		162	2,406
July	1,959	135	234		221		91	2,640
August	2,034	101	140		207		91	2,573
September	1,329	111	92		185		93	1,810
4th Quarter	5,322	347	466		613		275	7,023
FY 2003 Total	13,298	947	1,149		1,392		790	17,576

FY2002	Taipei	Kaohsiung	Taichung	Taoyuan	Miaoli	Hsinehu	Other	TOTAL
October	1,207	136	116		168		98	1,725
November	1,233	98	132		155		53	1,671
December	1,170	64	168		256		89	1,747
1st Quarter	3,610	298	416		579		240	5,143
January	1,151	109	145		164		122	1,691
February	2,347	103	275		233		151	3,109
March	775	91	103		106		59	1,134
2nd Quarter	4,273	303	523		503		332	5,934
April	1,084	86	107		135		79	1,491
May	1,122	79	105		148		74	1,528
June	1,416	132	182		167		117	2,014
3rd Quarter	3,622	297	394		450		270	5,033
July	1,431	91	147		168		89	1,926
August	1,656	93	105		124		73	2,051
September	959	79	46		92		54	1,230
4th Quarter	4,046	263	298		384		216	5,207
FY2002 Total	15,551	1,161	1,631		1,916		1,058	21,317

Guam's Marketshare of Taiwan Travelers

	FY 2002	Guam	Guam	FY 2003	Guam	Guam	FY 2004	Guam	Guam	FY 2005	Guam	Guam
	TOT ¹	Pax ²	MS ³	TOT ¹	Pax ²	MS ³	TOT ¹	Pax ²	MS ³	TOT ¹	Pax ²	MS ³
October	541,996	1,725	0.32%	615,504	1,484	0.24%	651,386	1,680	0.26%	684,425	1,675	0.24%
November	472,118	1,671	0.35%	506,730	1,034	0.20%	536,481	1,029	0.19%	579,489	1,246	0.22%
December	514,673	1,747	0.34%	503,234	808	0.16%	508,667	1,714	0.34%	566,377	1,188	0.21%
1st Quarter	1,528,787	5,143	0.34%	1,625,468	3,326	0.20%	1,696,534	4,423	0.26%	1,830,291	4,109	0.22%
January	547,259	1,691	0.31%	542,979	1,376	0.25%	668,148	2,976	0.45%	568,456	1,890	0.33%
February	610,394	3,109	0.51%	619,199	2,630	0.42%	506,105	1,786	0.35%	712,463	3,198	0.45%
March	589,178	1,134	0.19%	470,929	815	0.17%	576,992	1,683	0.29%	598,709	1,489	0.25%
2nd Quarter	1,746,831	5,934	0.34%	1,633,107	4,821	0.30%	1,751,245	6,445	0.37%	1,879,628	6,577	0.35%
April	645,551	1,491	0.23%	232,836	735	0.32%	630,184	1,543	0.24%	700,031	1,252	0.18%
May	635,046	1,528	0.24%	112,983	588	0.52%	605,731	1,991	0.33%	701,569	1,895	0.27%
June	623,611	2,014	0.32%	249,789	1,083	0.43%	720,843	2,440	0.34%	729,041	2,291	0.31%
3rd Quarter	1,904,208	5,033	0.26%	595,608	2,406	0.40%	1,956,758	5,974	0.31%	2,130,641	5,438	0.26%
July	745,914	1,926	0.26%	678,036	2,640	0.39%	831,624	2,800	0.34%	890,098	3,205	0.36%
August	710,749	2,051	0.29%	718,522	2,573	0.36%	755,375	2,697	0.36%	785,337	2,214	0.28%
September	586,296	1,230	0.21%	601,265	1,810	0.30%	655,359	2,132	0.33%	696,855	1,505	0.22%
4th Quarter	2,042,959	5,207	0.25%	1,997,823	7,023	0.35%	2,242,358	7,629	0.34%	2,372,290	6,924	0.29%
FY TOTAL	7,222,785	21,317	0.30%	5,852,006	17,576	0.30%	7,646,895	24,471	0.32%	8,212,850	23,048	0.28%

1 Taiwan Overseas Travellers. Source: Tourism Bureau, Ministry of Transportation and Communications, Republic of China

2 Guam's Pax, Source: Customs Declaration Forms, Customs & Quarantine Agency

3 Guam Market Share

Visitor Arrivals By Country

Hong Kong

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
FY2002	391	658	1,009	489	869	660	731	987	861	860	976	402	8,893
FY2003	645	607	357	216	575	327	437	327	341	383	509	330	5,054
FY2004	379	379	417	504	345	339	488	359	559	541	512	328	5,150
FY2005	380	357	444	230	403	353	284	421	262	291	489	379	4,293

Philippines

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
FY2002	494	527	527	404	509	754	629	550	589	522	466	456	6,427
FY2003	537	648	466	460	369	521	697	667	591	511	495	419	6,381
FY2004	532	577	631	449	501	661	893	765	556	556	525	489	7,135
FY2005	607	493	571	516	547	698	620	601	518	525	447	455	6,598

Micronesia *CNMI • Palau • FSM • RMI*

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
FY2002	494	527	527	404	509	754	629	550	589	522	466	456	6,427
FY2003	537	648	466	460	369	521	697	667	591	511	495	419	6,381
FY2004	532	577	631	449	501	661	893	765	556	556	525	489	7,135
FY2005	607	493	571	516	547	698	620	601	518	525	447	455	6,598

North America • Hawaii Armed Forces

Hawaii • U.S. Mainland (civilian)

Mainland	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
FY2002	2,029	2,165	2,925	3,062	2,683	2,868	2,277	2,674	2,933	3,158	2,421	2,474	31,669
FY2003	2,911	2,412	3,200	2,728	3,165	3,098	3,049	3,091	2,929	2,838	2,354	2,095	33,870
FY2004	2,457	2,446	2,733	2,944	3,185	3,146	3,203	2,909	3,045	3,913	2,946	2,958	35,885
FY2005	3,281	2,684	3,008	3,363	3,423	3,402	3,415	3,045	3,518	3,726	2,741	2,429	38,035

Hawaii	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
FY2002	557	603	794	758	639	707	1,107	715	667	613	647	616	8,423
FY2003	671	719	589	686	579	803	652	747	657	672	561	672	8,008
FY2004	747	801	665	614	716	751	686	660	927	854	750	736	8,907
FY2005	737	906	600	933	655	813	726	662	776	814	789	704	9,115

Armed Forces (air & sea)

Armed	2005			2004			2003			2002		
Forces	AIR	SEA	TOTAL	AIR	SEA	TOTAL	AIR	SEA	TOTAL	AIR	SEA	TOTAL
OCT	494	2,990	3,484	409	2,637	3,046	938	1,328	2,266	558	1,074	1,632
NOV	757	2,470	3,227	780	7,470	8,250	322	3,447	3,769	539	1,723	2,262
EDC	1,036	1,049	2,085	402	963	1,365	556	583	1,139	1,116	469	1,585
1st QTR	2,287	6,509	8,796	1,591	11,070	12,661	1,816	5,358	7,174	2,213	3,266	5,479
JAN	847	814	1,661	547	1,759	2,306	364	959	1,323	1,150	472	1,622
FEB	617	7,458	8,075	562	10,770	11,332	686	11,064	11,750	630	367	997
MAR	566	1,536	2,102	414	1,120	1,534	561	453	1,014	623	1,060	1,683
2nd QTR	2,030	9,808	11,838	1,523	13,649	15,172	1,611	12,476	14,087	2,403	1,899	4,302
APR	1,136	2,029	3,165	399	1,097	1,496	627	9,063	9,690	1,065	2,174	3,239
MAY	558	1,716	2,274	703	1,152	1,855	453	13,665	14,118	678	8,666	9,344
JUN	585	5,884	6,469	543	1,534	2,077	416	1,050	1,466	504	662	1,166
3rd QTR	2,279	9,629	11,908	1,645	3,783	5,428	1,496	23,778	25,274	2,247	11,502	13,749
JUL	1,019	13,241	14,260	1,234	477	1,711	472	1,085	1,557	271	355	626
AUG	324	2,015	2,339	869	6,962	7,831	195	748	943	958	2,887	3,845
SEP	497	1,191	1,688	720	2,045	2,765	451	506	957	593	520	1,113
4th QTR	1,840	16,447	18,287	2,823	9,484	12,307	1,118	2,339	3,457	1,822	3,762	5,584
FY Total	8,436	42,393	50,829	7,582	37,986	45,568	6,041	43,951	49,992	8,685	20,429	29,114

Hotel Occupancy Tax Collections

	FY2002	FY2003	FY2004	FY2005
COLLECTIONS	\$15,006,282.27	\$13,224,215.64	\$17,653,670.42	\$18,991,230.92
% CHG OVER LY	-27.9%	-11.9%	33.5%	7.6%

Hotel Occupancy Rates

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	FY AVG
FY2002	30%	36%	45%	55%	64%	61%	48%	54%	54%	69%	70%	68%	55%
FY2003	50%	59%	32%	55%	68%	55%	47%	45%	40%	66%	57%	63%	53%
FY2004	51%	60%	53%	55%	68%	55%	47%	45%	40%	66%	57%	63%	55%
FY2005	51%	60%	53%	71%	72%	64%	56%	57%	53%	66%	71%	65%	62%

Room Inventory

	2002	2003	2004	2005
	8,915	8,915	8,555	8,966

GUAM VISITORS BUREAU
(A Public Corporation)
Balance Sheets
September 30, 2002 and 2001

ASSETS	2002	2001
Current assets:		
Cash	\$ 533,714	\$ 4,037,379
Accounts receivable - Government of Guam, net of allowance for doubtful accounts of \$ 2,096,466 in 2002 and 2001	8,035,923	1,206,516
Accounts receivable-TAF special projects	374,915	322,810
Accounts receivable - other	750	988
Prepaid expenses	32,056	32,056
Total current assets	8,977,358	5,599,749
Other assets	217,621	217,621
Property and equipment, at cost, net of accumulated depreciation and amortization	7,819,749	7,916,648
	\$ 17,014,728	\$ 13,734,018
LIABILITIES AND FUND EQUITY		
Current liabilities:		
Accounts payable	\$ 6,114,981	\$ 3,232,532
Accrued liabilities	310,668	804,506
Deferred revenue	2,976,053	-
Total current liabilities	9,401,702	4,037,038
Unfunded pension cost	72,776	72,776
Accrued annual leave	198,452	169,832
Total liabilities	9,672,930	4,279,646
Commitments		
Fund equity:		
Contributed capital:		
Tourist Attraction Fund	7,978,527	7,978,527
Retained earnings (deficit):		
Unappropriated deficit		(535,187)
Appropriated retained earnings(deficit)	(636,729)	2,011,032
Total retained earnings (deficit)	(636,729)	1,475,845
Total fund equity	7,341,798	9,454,372
	\$ 17,014,728	\$ 13,734,018

SPECIAL TOURIST ATTRACTION FUND PROJECTS
Balance Sheets
September 30, 2002 and 2001

ASSETS	2002	2001
Restricted cash	\$ 14,497	\$ 351,501
Accounts receivable - other	1,045,905	436,000
	\$ 1,060,402	\$ 787,501
LIABILITIES AND FUND EQUITY		
Current liabilities:		
Accounts payable	\$ 1,359	\$ 82,363
Interfund payable - GVB operations	374,915	322,810
Deferred revenue	609,905	-
	986,179	405,173
Fund balance:		
Appropriated retained earnings	74,223	382,328
	\$ 1,060,402	\$ 787,501

GUAM VISITORS BUREAU
(A Public Corporation)
Balance Sheets September 30, 2003 and 2002

ASSETS	2003	2002
Current assets:		
Cash	\$ 4,149,419	\$ 533,714
Accounts receivable - Government of Guam, net of allowance for doubtful accounts of \$ 2,096,466 in 2002 and 2001	5,431,595	8,035,923
Accounts receivable-TAF special projects	894,830	374,915
Accounts receivable - other	24,174	750
Prepaid expenses	146,496	32,056
Total current assets	10,646,514	8,977,358
Other assets	217,621	217,621
Property and equipment, at cost, net of accumulated depreciation and amortization	7,758,176	7,819,749
	\$ 18,622,311	\$ 17,014,728
LIABILITIES AND FUND EQUITY		
Current liabilities:		
Accounts payable	3,192,363	\$ 6,114,981
Accrued liabilities	-	310,668
Deferred revenue	6,399,497	2,976,053
Total current liabilities	9,591,860	9,401,702
Unfunded pension cost	72,776	72,776
Accrued annual leave	139,258	198,452
Total liabilities	9,803,894	9,672,930
Net assets:		
Contributed capital:		
Invested in capital assets	7,758,176	7,819,749
Unrestricted	1,060,241	(477,951)
Total net assets	8,818,417	7,341,798
	\$ 18,622,311	\$ 17,014,728

SPECIAL TOURIST ATTRACTION FUND PROJECTS
Balance Sheets
September 30, 2003 and 2002

ASSETS	2003	2002
Restricted cash	\$ 23,299	\$1,045,905
Accounts receivable - other, net of allowance for doubtful accounts of \$1,045,905 in 2003	590,000	436,000
	\$ 613,299	\$ 1,060,402
LIABILITIES AND NET ASSETS		
Current liabilities:		
Accounts payable	\$ -	\$ 1,359
Interfund payable - GVB operations	894,830	374,915
Deferred revenue	153,936	609,905
	1,048,766	986,179
Net Assets:		
Restricted	(435,467)	74,223
	\$ 613,299	\$ 1,060,402

GUAM VISITORS BUREAU
(A Public Corporation)
Balance Sheets (Unaudited) Ending September 30, 2004 Operations/Members
As of 9/30/2004

	Current Period Balance
Assets	
Current Assets:	
Cash	1,130,296.30
Accounts Receivable	13,00,766.25
Time Certificate of Deposits	470,073.64
Total Current Assets:	14,601,136.19
Other Assets	
Prepaid Expenses	28,855.75
Deposits	95,993.18
Total Other Assets	124,848.93
Fixed Assets:	
Building	1,659,722.59
Land	5,992,415.00
Equipment	26,317.85
Leasehold Improvement	-
Furniture & Fixtures	-
Total Fixed Assets	7,678,455.44
Total Assets	22,404,440.56
Liability & Fund Equity	
Current Liability	
Accounts Payable	2,194,304.67
Accrued Liabilities	1,405,801.19
Total Current Liability	3,600,105.86
Unfunded Pension Cost	
Accrued Annual Leave	442,448.53
Fund Equity	
Contributions	7,652,137.59
Fund Equity	10,603,179.88
Total Fund Equity	18,255,317.47
Total Liability & Fund Equity	22,404,440.56

300 - Tourist Attraction Fund
Balance Sheets (Unaudited) Ending September 30, 2004
As of September 30, 2004

Assets	
Current Assets	
Cash	51,945.05
Accounts Receivable	2,069,905.00
Total Current Assets	2,121,850.05
Other Assets	
Prepaid Expenses	1,832.55
Total Other Assets	1,832.55
Total Assets	2,123,682.60
Liability & Fund Equity	
Current Liability	
Accounts Payable	-
Accrued Liabilities	1,110,897.09
Total Current Liability	1,110,897.09
Fund Equity	
Fund Equity	1,012,785.51
Total Fund Equity	1,012,785.51
Total Liability & Fund Equity	2,123,682.60

Financials FY2005

GUAM VISITORS BUREAU
(A Public Corporation)
Balance Sheets (Unaudited) Ending September 30, 2005 Operations/Membership
As of 9/30/2005

	Current Period Balance
Assets	
Current Assets:	
Cash	1,535,315.36
Accounts Receivable	15,825,787.01
Time Certificate of Deposits	477,361.83
Total Current Assets:	17,838,464.20
Other Assets	
Prepaid Expenses	47,800.20
Deposits	95,933.18
Total Other Assets	143,793.38
Fixed Assets:	
Building	1,576,389.31
Land	5,992,415.00
Equipment	151,405.98
Leasehold Improvement	-
Furniture & Fixtures	-
Total Fixed Assets	7,20,210.29
Total Assets	25,702,467.87
Liability & Fund Equity	
Current Liability	
Accounts Payable	1,646,056.98
Accrued Liabilities	100,000.00
Total Current Liability	3,141,744.37
Unfunded Pension Cost	442,448.53
 Accrued Annual Leave	 165,021.25
Deferred Revenue FY 2005	4,609,709.00
 Fund Equity	
Contributions	7,652,137.59
Fund Equity	9,691,407.13
Total Fund Equity	17,343,544.72
Total Liability & Fund Equity	25,702,467.87

300 - Tourist Attraction Fund
Balance Sheets (Unaudited) Ending September 30, 2004
As of September 30, 2004

Assets	
Current Assets	
Cash	20,132.96
Accounts Receivable	3,162,905.00
Total Current Assets	3,183,037.96
Other Assets	
Prepaid Expenses	1,832.55
Total Other Assets	1,832.55
Total Assets	3,183,037.96
Liability & Fund Equity	
Current Liability	
Accounts Payable	45,041.52
Accrued Liabilities	1,210,897.09
Total Current Liability	1,255,938.61
Deferred Revenue FY 2005	793,000.00
Fund Equity	
Fund Equity	1,135,931.90
Total Fund Equity	1,135,931.90
Total Liability & Fund Equity	3,184,870.51

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