TOURISM TODAY

The State, the Strategy, and the Story Ahead



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Guam Chamber of Commerce General Membership Meeting
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TOURISM UPDATES

Arrivals: August 2025

August 1-31, 2025

Total: 79,918 (+17.9%)

% Market Mix	Origin	2024	2025	% vs LY
48.8%	Korea	28,731	38,476	33.9%
37.0%	Japan	26,156	29,168	11.5%
7.0%	US/Hawaii	6,255	5,526	-11.7%
1.5%	Philippines	1,148	1,170	1.9%
1.1%	Taiwan	178	866	386.5%
0.6%	China	514	501	-2.5%
0.1%	Hong Kong	79	62	-21.5%

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

Arrivals: September 2025

September 1-15, 2025

Total: 29,938 (+19.5%)

% Market Mix	Origin	2024	2025	% vs LY
47.2%	Korea	12,245	14,133	15.4%
35.7%	Japan	8,039	10,676	32.8%
9.6%	US/Hawaii	2,780	2,872	3.3%
1.6%	Philippines	400	488	22.0%
0.8%	Taiwan	82	241	193.9%
0.4%	China	99	111	12.1%
0.1%	Hong Kong	24	26	8.3%

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

Note: September 2025 Daily Arrivals reflect Civilian Air arrivals only

Arrivals: Calendar Year to Date

January – September 15, 2025

Total: 525,595 (-2.2%)

% Market Mix	Origin	2024	2025	% vs LY
46.8%	Korea	275,645	246,153	-10.7%
33.1%	Japan	145,814	173,900	19.3%
11.2%	US/Hawaii	63,888	58,673	-8.2%
1.9%	Philippines	9,134	10,051	10.0%
1.2%	Taiwan	2,271	6,229	174.3%
0.6%	China	3,628	3,399	-6.3%
0.1%	Hong Kong	515	529	2.7%

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

Note: September 2025 Daily Arrivals reflect Civilian Air arrivals only

Arrivals: Fiscal Year to Date

October 2024 – September 15, 2025

Total: 700,851 (-3.5%)

% Market Mix	Origin	2024	2025	% vs LY
47.2%	Korea	378,765	330,952	-12.6%
32.8%	Japan	196,387	229,746	17.0%
11.0%	US/Hawaii	83,910	77,060	-8.2%
2.0%	Philippines	12,782	14,008	9.6%
1.1%	Taiwan	2,792	7,433	166.2%
0.6%	China	4,556	4,381	-3.8%
0.1%	Hong Kong	754	693	-8.1%

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

Note: September 2025 Daily Arrivals reflect Civilian Air arrivals only

VISITOR PROFILE

SOUTH KOREA

PARTY

39.24
AVERAGE AGE

3.63
AVERAGE PARTY SIZE

$64,184
AVERAGE HOUSEHOLD INCOME

3.89
NIGHTS
AVERAGE LENGTH OF STAY

SPENDING

$551.79
ON ISLAND PER PERSON

$1,093.41
TOTAL SPENDING PER PERSON
(PREPAID + ON ISLAND)

TOP CATEGORIES

1. ACCOMMODATIONS
2. ACTIVITIES/ ENTERTAINMENT
3. SHOPPING
4. FOOD/BEVERAGE

Source: Guam Visitors Bureau Exit Surveys, Fiscal Year 2025 Q4 (July-September 2025).

VISITOR PROFILE

JAPAN

PARTY

38.22
AVERAGE AGE

3.03
AVERAGE PARTY SIZE

$51,008
AVERAGE HOUSEHOLD INCOME

3.28
NIGHTS
AVERAGE LENGTH OF STAY

SPENDING

$390.75
ON ISLAND PER PERSON

$1,022.18
TOTAL SPENDING PER PERSON
(PREPAID + ON ISLAND)

TOP CATEGORIES

1. ACCOMMODATIONS
2. SHOPPING
3. ACTIVITIES/ ENTERTAINMENT
4. TRANSPORTATION

Source: Guam Visitors Bureau Exit Surveys, Fiscal Year 2025 Q4 (July-September 2025).

ECONOMIC IMPACT

THE VISITOR ECONOMY IN GUAM
Guam Tourism Satellite Account (2024)



$1.1B

Direct Visitor Spending



$1.4B

Total Economic Impact



14.4K

Total Jobs Supported



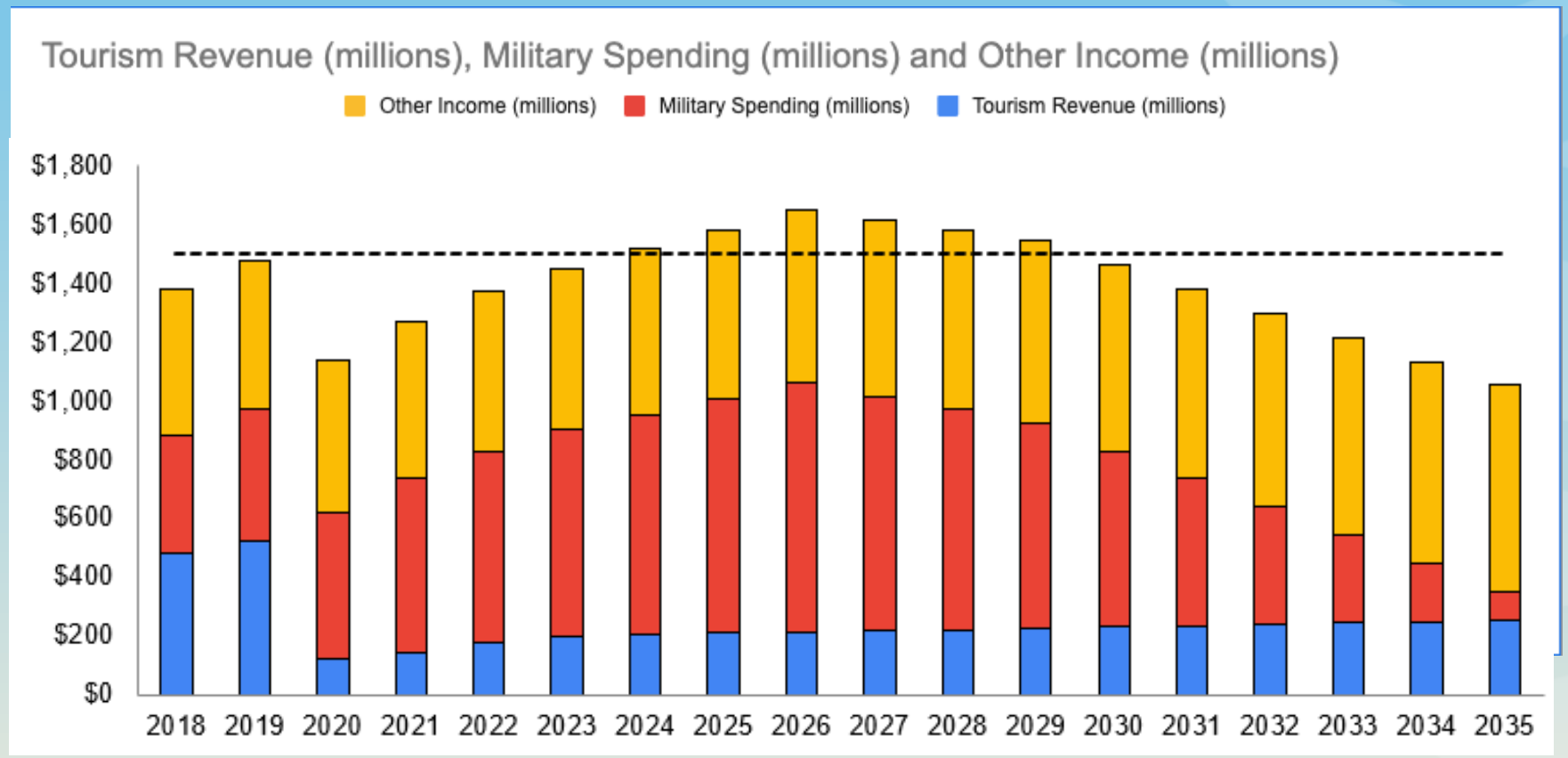
$151M

Local Guam Taxes

Source: Guam Tourism Satellite Account, Tourism Economics, Economic Report 2024.

GUAM'S INCOME STREAMS

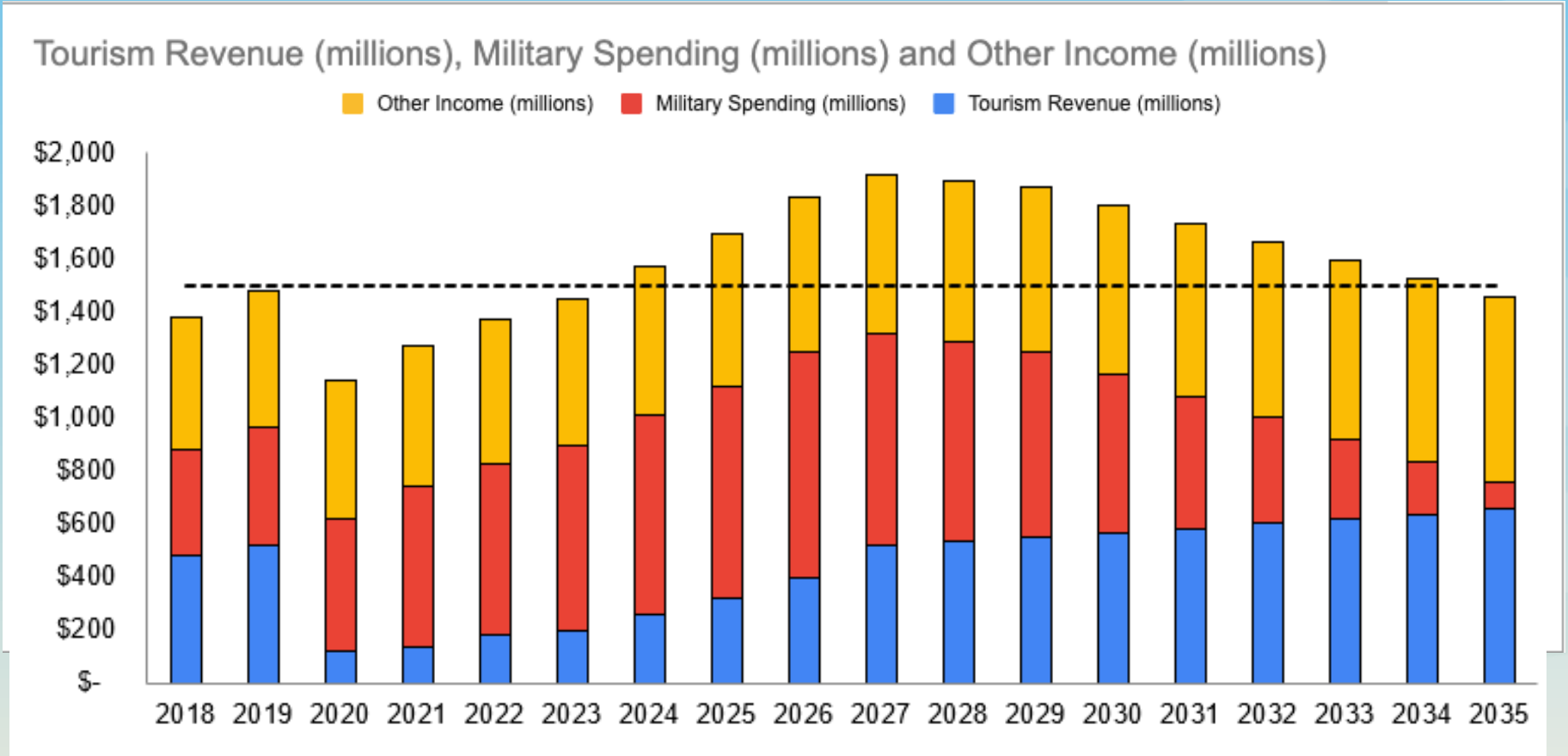
The MILCON Cliff: Military spending cannot subsidize us forever.



NOTE: Figures shown are diagrammatic; the graph is intended for presentation purposes only.

GUAM'S INCOME STREAMS

Tourism: Guam's Proven Path to Prosperity



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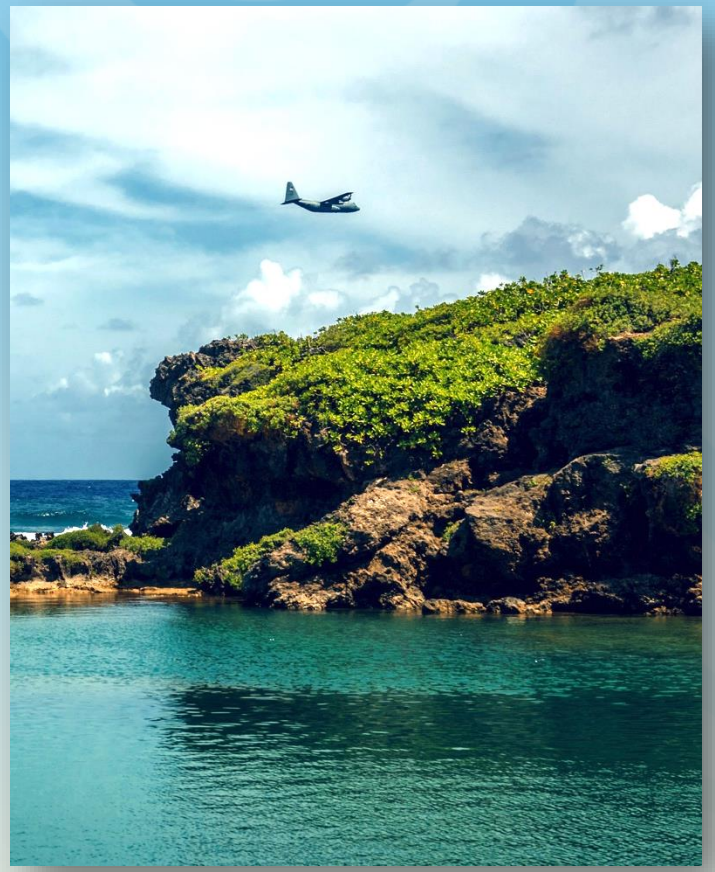
MARKETING

ROUTE DEVELOPMENT

- REMINDER: Airports throughout the world offer incentives to entice service
  - Thailand: 95% off landing fees for new destinations
  - Hong Kong: Offers range from HK$10K (US$1,271) - HK$20K (US$2,547) per trip for new routes
  - Denver: Incentive for new carriers $7M for unserved routes in Asia (2-year term)
  - Some offer incentives *and* marketing funds (e.g., Los Angeles and New York)



ROUTE DEVELOPMENT

- $10 million in airline incentives approved for FY2026
  - GVB incentives include flights and co-op marketing
  - Incentives are performance-based
- FY2025 incentives resulted in additional seats



ROUTE DEVELOPMENT

- Results
  - **Philippines** – Announcement by PAL for Cebu route
  - **Korea** - Air Seoul and Air Busan resuming service on October 26
  - **Japan** – chartered flights secured for year end, more to come





ROUTE DEVELOPMENT

- Results: Taiwan
  - Route began April 2025
  - Success in launch

MONTH	LOAD FACTOR %
APRIL	73%
MAY	73%
JUNE	83%
JULY	86%
AUGUST	74%

MONTH	TOTAL ARRIVALS			
	TOTAL	LOCAL RESIDENTS	VISITORS	TRANSIT
APRIL	**1,039**	318	706	15
MAY	**1,069**	312	741	18
JUNE	**1,111**	272	815	24
JULY	**1,279**	290	962	27
AUGUST	**1,099**	263	809	27

ADDED VALUE CAMPAIGNS

- Sales drivers added by working closely with agents, airlines, optional tours, and others in the supply chain
- Special programs
  - Kids fly free
  - OTA 1+1
  - Early hotel check-in
  - Discounts and offers from GVB members



DESTINATION DEVELOPMENT

KEEPING THE PROMISE







GVB Destination Maintenance team conducting tree trimming and debris removal throughout Tumon

GVB Destination Maintenance team completed the repainting of Tumon fire hydrants and bollards







KEEPING THE PROMISE







GVB Destination Maintenance team cleaning and sprucing up area near Tumon police precinct

GVB Visitor and Beach Safety Officers expanding their reach beyond Tumon and Hagåtña



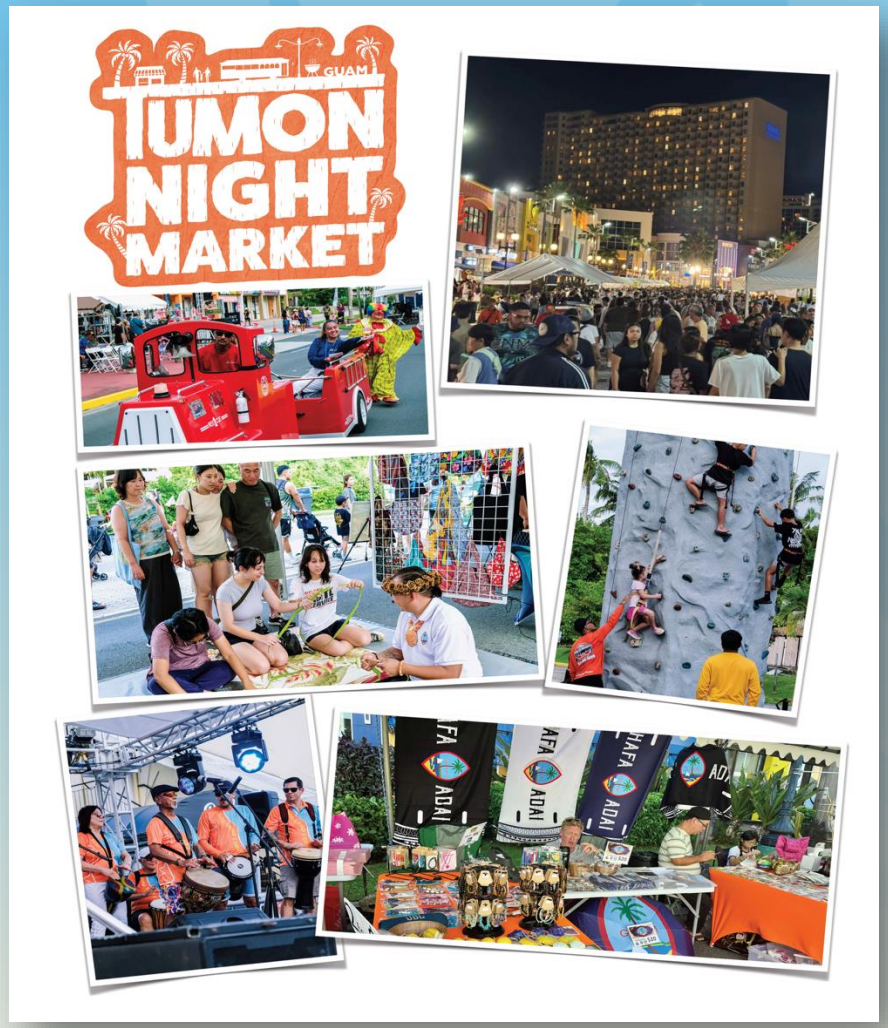




TUMON NIGHT MARKET SUCCESS

- Continues to draw thousands of residents, visitors, and military community
- Great partnership with vendors and win-win for the tourism industry
- Now: exploring how we can sustain this momentum

GET INVOLVED!
tumonnightmarket@visitguam.com



GUAM INTERNATIONAL DANCE FESTIVAL (GIDF)

- Inaugural GIDF scheduled on December 5-7, 2025
- Showcase and competition to celebrate cultural heritage, creative expression, and artistic excellence
- Registration closes on October 29
- Over 25 dance groups registered representing Japan, Taiwan, Malaysia, Philippines, India and Guam.



KO'KO' REGISTRATION LAUNCH

- Register Now for "Early Bird" Period at www.visitguam.com/koko/
- Resolidified partnership with Japan Club of Guam to include Japan Festival during Ko'ko' Weekend





KO'KO' WEEKEND EVENTS

April 11, 2026	Ko'ko' Kids Event (4-9 years old) 44th Harumatsuri Guam Japan Festival
April 12, 2026	Half Marathon & 5K Ekiden Relay

PARTNERS IN PROGRESS



GVB partnered with GCC, GDOL and JGTA for a Bus Driver Boot Camp to address shortage of drivers and improve ground transportation services.



GVB partnered with the Guam Chamber of Commerce for the Destination Enhancement Initiative, conducting the Asset Improvement Census.

GVB NEWSLETTER



GUAM | GUAM VISITORS BUREAU

ISTORIA
THE STORY

October 2025 Edition

View Newsletter Here

Tourism Brings $1.4B in Economic Impact to Guam in 2024

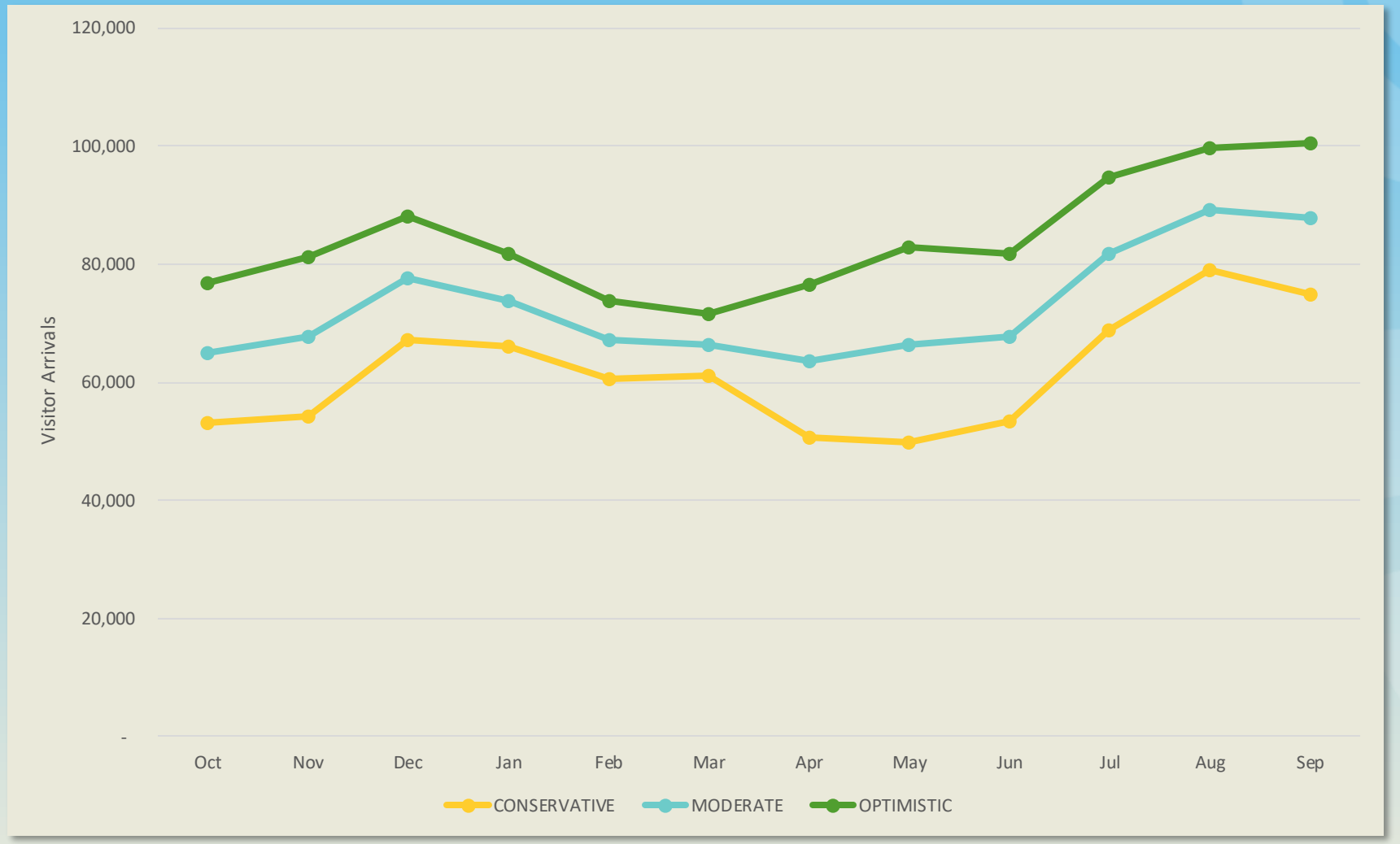
The Guam Visitors Bureau (GVB) recently released the 2024 Tourism Economic Impact Report prepared by Tourism Economics, an Oxford Economics company.

In 2024, the tourism economy generated $1.4 billion in direct, indirect, and induced impacts for Guam. This is the result of 739,000 visitors spending $1.1 billion directly in tourism-related industries, which also generated additional supply chain sales ($100 million) and household income ($200 million), totaling to an economic impact of $1.4 billion.

GVB relaunched its monthly newsletter, which provides highlights of GVB initiatives, market updates, and all things Guam tourism.

SIGN-UP TODAY

ARRIVALS FORECAST FY26



TOTAL VISITORS

OPTIMISTIC
1,009,981

MODERATE
874,517

CONSERVATIVE
739,051

LET’S WORK TOGETHER

BECOME A GVB MEMBER TODAY!

SUPPORT GVB EVENTS AS SPONSORS

HELP IMPROVE OUR DESTINATION OFFERINGS

SHARE CONCERNS AND FEEDBACK DIRECTLY



SI YU'OS MA'ÅSE'



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