

**AIR SERVICE DEVELOPMENT (ASD) COMMITTEE MEETING**  
**10:00 AM | TUESDAY, FEBRUARY 22, 2022**  
**GVB Main Conference Room and virtually via GoToMeeting**

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**ATTENDANCE** (\*Participated virtually)

**Members/Allied Partners Present:**

1. Milton Morinaga – GVB Board Chairman, ASD Committee Chairman, PHR Ken Micronesia
2. Rolenda Fausuamalie, A.B Won Pat Guam International Airport Authority\*

**GVB Management/Staff Present:**

1. Colleen Cabedo – Marketing Manager – Korea\*
2. Brian Borja - Marketing Manager – Air Service
3. Gabryel Franquez – Marketing Manager – Taiwan
4. Elaine Pangelinan – Marketing Manager – Taiwan\*
5. Sharlene Guerrero – Marketing Manager - Philippines\*
6. Erik Salvador – Marketing Coordinator – Philippines\*
7. Margaret Sablan – Marketing Coordinator - Korea\*
8. Felix Yen – GVB Taiwan\*
9. Jay Park – GVB Korea\*
10. AJ Rosario – Web & IT Coordinator

**Guests Present:**

None

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**I. CALL MEETING TO ORDER**

- Chairman Milton called the meeting to order at 10:00am.

**II. APPROVAL OF PREVIOUS MEETING MINUTES – November 30, 2021**

- Rolenda motioned to approve the meeting minutes as written. Motion approved.

**III. REPORT OF THE CHAIRMAN**

- Chairman Milton noted the following issues:
  - A lot of the different countries are slowly opening up their borders like Australia, Vietnam, Britain, UK, and other countries.
  - They are easing up on their quarantine protocols. We are still waiting out key markets of Japan, Korea and Taiwan to open up.
  - Just read word that Taiwan's Starlux (airline) has just received its first aircraft, the 787.
  - Japan Airlines announced they won't fly to Guam until May.
  - Japan, Korean and Taiwan still have very strict protocols, but Japan is easing but not eased enough. We will wait next week for a second announcement regarding the quarantine protocol from Japan. Korea's election will be in two weeks, which is when we will see if that will change quarantine protocols.

**IV. REPORT OF MANAGEMENT**

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- Moved to market updates.

## V. MARKET UPDATES

- Mr. Brian Borja reported the following tourism research updates.

### SEAT CAPACITY DECEMBER 2021 - MARCH 2022



Market	December	January	February	March	TOTAL
Japan	5,146	5,146	4,648	12,398	27,338
Korea	10,750	6,818	3,348	18,214	39,130
Taiwan	-	-	-	-	-
China	-	-	-	-	-
US/Hawaii	10,850	10,850	9,800	10,850	42,350
Philippines	7,534	7,733	6,439	8,330	30,036
Hong Kong	-	-	-	-	-
Other	8,466	8,964	7,636	9,628	34,694
<b>TOTAL</b>	<b>42,746</b>	<b>39,511</b>	<b>31,871</b>	<b>59,420</b>	<b>173,548</b>
<b>SEATS LOSS</b>	<b>-7,635</b>	<b>-27,595</b>	<b>-44,471</b>	<b>-53,943</b>	<b>-133,644</b>

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of February 9, 2022.

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## SEAT CAPACITY



Market	FY2019	FY2020	FY2021	FY2022
Japan	860,553	551,901	139,321	361,242
Korea	857,149	612,617	160,974	254,342
Taiwan	40,272	20,382	4,882	18,952
China	-	-	-	-
US/Hawaii	133,588	133,224	127,512	130,004
Philippines	151,820	98,560	45,383	110,340
Hong Kong	31,350	922	-	-
Other	175,646	99,216	52,744	150,894
<b>TOTAL</b>	<b>2,250,378</b>	<b>1,516,822</b>	<b>530,816</b>	<b>1,025,774</b>
<b>Growth vs. LY</b>	<b>6.2%</b>	<b>-32.6%</b>	<b>-65.0%</b>	<b>93.2%</b>

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of February 9, 2022.

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## SEAT CAPACITY



Market	FY2019	FY2020	FY2021	FY2022
Japan	860,553	551,901	139,321	361,242
Korea	857,149	612,617	160,974	276,811
Taiwan	40,272	20,382	4,882	12,600
China	-	-	-	-
US/Hawaii	133,588	133,224	127,512	129,822
Philippines	151,820	98,560	45,383	107,952
Hong Kong	31,350	922	-	-
Other	175,646	99,216	52,744	150,894
<b>TOTAL</b>	<b>2,250,378</b>	<b>1,516,822</b>	<b>530,816</b>	<b>1,039,321</b>
<b>Growth vs. LY</b>	<b>6.2%</b>	<b>-32.6%</b>	<b>-65.0%</b>	<b>95.8%</b>

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of February 16, 2022.

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## JAPAN SEAT CAPACITY



Airline	FY2019	FY2020	FY2021	FY2022
United	449,888	275,460	52,162	285,274
JAL	116,144	53,610	597	37,412
Delta	-	-	-	-
Korean Air	-	-	-	-
Tway Air	140,427	-	13,041	35,532
Jeju Air	136,080	149,877	73,521	3,024
Jin Air	5,103	72,954	-	-
Uzbekistan	-	-	-	-
Air Busan	12,285	-	-	-
China Airlines	626	-	-	-
<b>TOTAL</b>	<b>860,553</b>	<b>551,901</b>	<b>139,321</b>	<b>361,242</b>
<b>Growth vs LY</b>	<b>20.4%</b>	<b>-35.9%</b>	<b>-74.8%</b>	<b>159.3%</b>

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of February 16, 2022.

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## KOREA SEAT CAPACITY



Airline	FY2019	FY2020	FY2021	FY2022
Jeju Air	223,587	283,836	124,020	32,520
Air Busan	52,333	36,718	440	10,524
Korean Air	208,974	109,195	3,037	119,275
Jin Air	223,992	101,655	15,876	48,006
Tway Air	74,088	40,068	16,821	45,171
Air Seoul	74,175	41,145	780	20,865
Asiana Airlines	-	-	-	-
<b>TOTAL</b>	<b>857,149</b>	<b>612,617</b>	<b>160,974</b>	<b>276,811</b>
<b>Growth vs LY</b>	<b>-2.3%</b>	<b>-28.5%</b>	<b>-73.7%</b>	<b>72.0%</b>

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of February 16, 2022.

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## PHILIPPINES SEAT CAPACITY



Airline	FY2019	FY2020	FY2021	FY2022
United	53,974	27,806	29,216	47,362
PAL	69,766	65,354	16,167	60,590
Cebu	28,080	5,400	-	-
<b>TOTAL</b>	<b>151,820</b>	<b>98,560</b>	<b>45,383</b>	<b>107,952</b>
<b>Growth vs LY</b>	<b>4.1%</b>	<b>-35.1%</b>	<b>-54.0%</b>	<b>137.9%</b>

Source: Dlio ME: Marketing Intelligence for the Aviation Industry as of February 16, 2022.

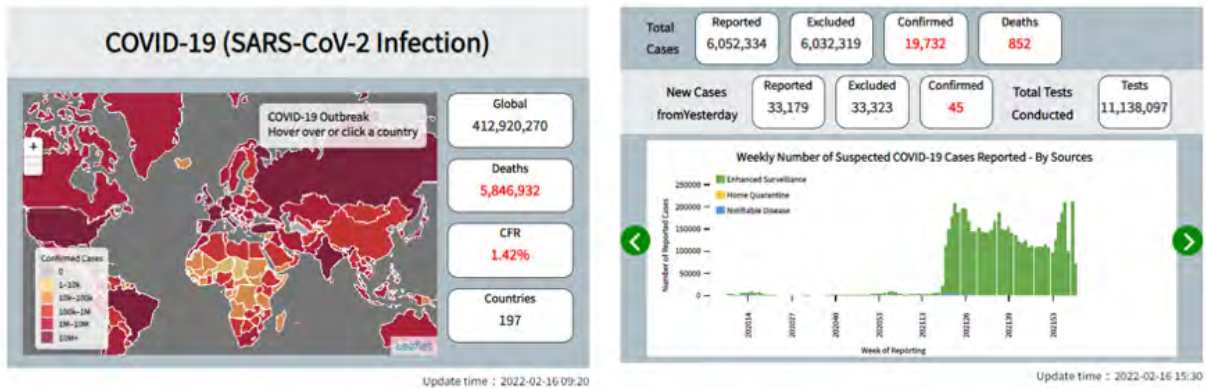
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- Taiwan Marketing Manager Ms. Gabbie Franquez reported the following market updates.

# Taiwan Market Conditions



## GLOBAL PANDEMIC CONDITIONS



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# Taiwan Market Conditions



Vaccine Maker	2 <sup>nd</sup> Dose/ Fully Vaccinated	1st Dose
AstraZeneca	7.09M (30.4%)	8.04M (34.47%)
moderna	4.01M (17.2%)	4.03M (17.27%)
Pfizer	5.81M (24.92%)	6.31M (27.05%)
MEDIGEN	0.73M (3.17%)	0.83M (3.56%)

FDA/WHO  
approved



**2<sup>nd</sup> dose/fully vaccinated: 75.7%**

**1st dose: 82.35%**

Not vaccinated < 12 years old	2.29M (9.83%)
Not vaccinated > 12 years old	1.82M (7.81%)

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# Updated Travel Entry Protocols



## Restrictions on Entering Taiwan-1/4-Taiwan Nationals, Foreign Nationals (starting January 12, 2022 Taipei Time)


Traveler Type	History of Travel	Eligible to Enter Taiwan?	Requirement upon Arrival
R.O.C. (Taiwan) National	Departure from any international port	Yes	1. a COVID-19 RT-PCR test report issued within 2 days prior to departure time (based on "specimen collection date," counting 2 calendar days backwards from scheduled departure time, excluding the flight date) 2. strengthened quarantine measures <sup>*note1</sup>

Traveler Type	Credential	Eligible to Enter Taiwan?	Requirement	
	• ARC means R.O.C. (Taiwan) Resident Certificate			
Foreign National	Holder of ARC (Resident visa not included)	1. Open to all purposes of entry. 2. Migrant worker must also hold re-entry permit.	Yes	1. a COVID-19 RT-PCR negative test report issued within 2 days prior to departure time (based on "specimen collection date," counting 2 calendar days backwards from scheduled departure time, excluding the flight date) 2. strengthened quarantine measures <sup>*note1</sup>
	Non-ARC holder	1. Who obtains entry permission for emergency or humanitarian reason. 2. Spouse or underage child of Taiwan national. 3. Student who obtains permission by Ministry of Education. <sup>*note3</sup> 4. Spouse or underage child of a ARC holder <sup>*note4</sup>	Yes	
		All others	No	


**Note:**

1. All travelers are required to undergo 14-day quarantine after arrival. All travelers are required to arrange their location of quarantine prior to arrival and follow other regulations and instructions by Taiwan Centers of Disease Control.
2. Effective 00:00 am, May 19, 2021, transit via Taiwan is temporarily suspended.
3. Personnel on diplomatic /government official business, migrant workers, students, should follow instructions by Ministry of Foreign Affairs, Ministry of Labor, and Ministry of Education.
4. ARC holder as migrant worker, student will not be applicable.

Travelers should use their mobile phone to log in the Quarantine System for Entry and to fill out the health declaration form prior to their departure. (<https://hdta.moh.gov.tw/>) Show confirmation message to quarantine staff. The confirmation message is required for entering Taiwan.



Quarantine System  
for Entry



Jan. 12 2022  
Ministry of Education

Travelers should use their mobile phone to log in the Quarantine System for Entry and to fill out the health declaration form prior to their departure. (<https://hdhq.mohw.gov.tw/>) Show confirmation message to quarantine staff. The confirmation message is required for entering Taiwan.



Jan. 12 2022  
Department of Health  
Ministry of the Interior

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# Updated Travel Entry Protocols



1. The Lunar New Year quarantine programs will be effective **from December 14, 2021 to February 28, 2022.**
2. Inbound passengers should undergo 14 days of quarantine and cooperate with the testing procedure.
3. The one person per room rule for quarantine in a hotel:
  1. Family members/cohabitants who enter Taiwan on the same day can choose to quarantine in the same room (depending on their willingness and room types of the quarantine hotel where they stay).
  2. It is recommended that no more than two adults share a single room.
  3. People who stay at the same room in a quarantine hotel can live in the same room after returning home.
4. **[Lunar New Year Quarantine program C: 7 +7 +7] :**
  1. Proof of being fully vaccinated against COVID-19 14 days ago is required for entry.
  2. Stay in a self-paid government quarantine facility/quarantine hotel for the first 7 days, spend the remaining 7 days at home (enhanced home quarantine), and practice 7 days of self-health management.
  3. One person per residence: during the 7-day of home quarantine, people not subjected to home quarantine are not allowed in the same residence; in principle, the one person per room arrangement should be followed.
  4. Family members in the same household who have been fully vaccinated against COVID-19 for 14 days are allowed to live with an inbound passenger while following the one person per room rule. Family members (not undergoing quarantine) should abide by the regulations below ("household" is defined in accordance with the relevant provisions of the Household Registration Act):
    1. Practice enhanced self-health management for 7 days when living with the inbound passenger. After the quarantine period of the inbound passenger expires, family members should practice a 7-day self-health management. Their local health department will issue a self-management notice.
    2. Take a self-paid at-home rapid test on the third and seventh day after the inbound passenger returns home.

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## Updated Travel Entry Protocols



### 5. **[Lunar New Year Quarantine program B: 10+4+7] :**

1. The first 10 days in quarantine hotel + the next 4 days at home for quarantine (enhanced version) + 7 days of self-health management.
2. Return home for quarantine for the last 4 days and abide by the principle of one person per residence.
3. Family members in the same household who have been fully vaccinated against COVID-19 for 14 days are allowed to live with an inbound passenger while following the one person per room rule in the same household.

### 6. **[Lunar New Year Quarantine program A: 14+0+7] :**

1. Stay in a quarantine hotel for 14 days and practice 7 days of self-health management.
  2. Passengers entering Taiwan on or after December 14, 2021 will be penalized heavily if they violate home quarantine regulations during their quarantine period.
- In order to conduct electronic tracking for community concern, inbound passengers please act in concert with using our country's telecom number (SIM card can be bought in airport after arriving) and personal cellphone (1 cell per person) for declaration. Nevertheless, special occasions, including, but not limited to children under 12 years old also having the same home quarantine location, is permitted to share the same cellphone for declaration.
  - For those entering from the main island of Taiwan, the quarantine location shall not be an outlying island; for those entering from an outlying island, the home quarantine location shall be an outlying island.
  - According to the regulations of the Taiwan government of the Republic of China, all travelers arriving at an airport in Taiwan or transit passengers must present a COVID-19 RT-PCR test report within 2 days before boarding.

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## Taiwan News



### ***Taiwan plan to shorten quarantines to 10 days by mid-March*** (Feb. 14, 2022)

- CECC announced that it plans to shorten the mandatory quarantine for overseas arrivals from 14 to 10 days and allow them to quarantine in their own homes before mid-March.
- CECC head Chen said the domestic outbreak has become "stable and controllable." He emphasized that in the case of special shortened quarantines for diplomatic or business bubbles, those participating must cooperate with related epidemic prevention measures.
- There would be a "7 + 3" plan eventually, but the 5+5 plan is still under consideration.



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## Airlines Market Intelligence Report



Airlines	GTO Contact	Updates
 CHINA AIRLINES	2/16 Shun-Yi Shih, Sales Representative, Passenger Sales And Marketing Dept.	<ul style="list-style-type: none"> <li>CL said that the recent flights will mainly focus on business travelers, cargo, and migrant workers. They will pay close attention to the changes in Taiwan government's entry policy.</li> <li>CL looks forward to initially planning a direct flight to Guam twice a week when Taiwan's quarantine regulations ease and lift ban on tour groups, also hope to create more business travelers in the future.</li> </ul>
 EVA AIR 長榮航空	2/15 Amy Cho, Junior Vice President	<ul style="list-style-type: none"> <li>Eva air Amy said that they will look at travel restrictions policy of various countries to make adjustments and regularly communicate with key travel agencies to understand local operation status. Countries that have the opportunity to reopen will give priority to planning.</li> <li>She mentioned that Guam's status will also be updated during Eva air's regular meetings. At the same time, they continue to observe Taiwan CECC's policy.</li> </ul>
 STARLUX 星宇航空	2/16 Ken Wang, Vice President Passenger Sales & Marketing Div.	<ul style="list-style-type: none"> <li>Starlux Ken said that current government quarantine policy is still mainly for business travelers, and they will continue to observe relevant news.</li> <li>He hopes that North American routes will be launched soon this year, and he mentioned that if there are any travel bubbles in the future, Starlux will give priority to promotion.</li> </ul>

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## Airlines Market Intelligence Report



### Competitor Updates

Destination	Updates
 Vietnam	<ul style="list-style-type: none"> <li>2/13: Vietnam to end Covid-19 travel curbs on international flights from Feb 15.</li> <li>Vietnam will remove its Covid-19 restrictions on international passenger flights with all markets starting Feb. 15, with no limitation on the number of flights, the state-run Tuoi Tre newspaper reported on Sunday.</li> </ul>
 Thailand	<ul style="list-style-type: none"> <li>2/14: Thailand is planning to reopen the Thai-Malaysia border in March to boost tourist arrivals, as Malaysian tourists have been the largest group of visitors to the kingdom before the Covid-19 pandemic.</li> </ul>
 Philippines	<ul style="list-style-type: none"> <li>2/10: The Philippines announced its full opening to vaccinated foreign travelers, after a nearly two-year ban imposed due to the COVID-19 pandemic.</li> <li>Vaccinated foreign travelers from the 157 countries that have visa-free arrangements with the Philippines will now be able to visit the country without having to undergo a quarantine. The visitors will also be required to have tested negative for the virus prior to departure.</li> </ul>

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## Consumer Sentiments for Travel



- Most consumers hope that the pandemic will disappear as soon as possible, so that they can travel to Guam this year.
- Consumers are also concerned about the news that Taiwan's entry quarantine policy may be shortened in March.
- Consumers are not willing to pay for the expenses for quarantine, so it would be good news if the quarantine period could be shortened and could isolate at home.



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## Taiwan Market Overview



### 2022 Travel and Air Service Market Prediction

- According to the 2022 Tourism Trend Report, more than 70% of the people hope to go abroad in 2022, and nearly 30% of the people hope to go abroad in the second quarter of 2022; The pandemic has also changed the way tourists travel. The proportion of people who choose group travel has increased from 35% in 2019 to 44%.
- This shows that many people think that the procedures for traveling abroad will become more complicated, so consumers hope that travel agencies will assist them.



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## Taiwan Market Overview



### 2022 Travel Trends

#### 1. Back to nature, beach trips are the first choice

According to Booking.com's global statistics, 53% of respondents want to be in touch with the outside world because they have been staying at home for a long time; 47% of respondents want to travel to places that are "not" famous attractions; 34% of respondents regard the ocean as a necessary condition. 21% of Taiwanese travelers said a leisurely beach trip would be their first choice after pandemic.

#### 2. Choose a neighboring country as a tourist destination

Japan is still the first choice for Taiwanese tourists (43%), and Taiwanese people prefer to travel to nearby Asian countries or cities, because the longer the journey, the higher the risk.

#### 3. Taiwan's three national airlines (China Airlines, EVA Air and STARLUX Airlines)

have all expressed their willingness to plan to arrange regular direct flights to Guam after the CDC relaxes the entry quarantine policy and opens the overseas travel regulations for travel agencies.

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## Taiwan Market Overview



### *The main market sources of Taiwanese tourists to Guam in 2022 (after the pandemic):*

1. **Young people** who have entered the workplace (50% women and 50% men, prefer to travel independently).
2. **Family travel** during winter and summer vacations and Chinese New Year holidays.
3. **Company trips** arranged through a travel agency.
4. **Students who study abroad** in winter and summer vacations, EMBA graduation trips, and teacher-student exchange and mutual visit programs in **seven sister universities**.
5. **Golf clubs**, competitions, diving, fishing, and other **adventure sports**.
6. **Business investigation** (Taiwan-invested companies have two Guam hotel construction and reorganization projects to start in 2022) to carry out hotel construction, development and operation planning.
7. **Three sister cities in Taiwan** (Taipei, Taoyuan and Taichung) state government and city government personnel visit (conferences and activities).
8. **Taiwan Indigenous Peoples Committee** to Guam for Exchange and International Conference.
9. **MICE** (meetings, incentives, conventions, exhibitions).

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- Chairman Milton asked about prioritizing target markets after the pandemic.
- What is the marketing efforts contingent to e.g. 2-day quarantine, 3-day quarantine, level 2?
- Requested to mention the exact target markets for Taiwan and at what point in the protocols will GTO start with their marketing efforts. Ms. Gabbie noted GTO will provide more details at



the next Taiwan Marketing Committee and Air Service Development Committee Meeting. No quarantine upon return and obtaining direct air service are definitely factors considered in GTO's plan.

- Chairman also mentioned the reduction in quarantine requirements in Bangkok, Thailand and Korea. Thailand has a 1-day quarantine with arrival to a hotel and ability to test-out with a negative result. Similarly, Korea allows entry with a 1-day quarantine for business trips allowing for free moment with a negative test result.

## 2022 Jan-Oct Seat Capacity Forecast

TPE-GUM		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Total
Seat Capacity Forecast by Airline	China Airlines	0	0	0	1,066	1,066	1,066	2,417	2,560	2,417	1,881	12,473
	EVA Air/Starlux Airlines	0	0	0	0	0	1,195	1,434	1,434	1,195	1,115	6,373
Total Seats		0	0	0	1,066	1,066	2,261	3,851	3,994	3,612	2,996	18,846

No direct air service from Taiwan to Guam during the same period last year.

China Airlines, the only carrier to provide regular direct flights before COVID, suspended its service in March 2020.

Above estimations are based on:

- Airlines receiving the GVB Regular Air Service Incentive
- Taiwan relaxing travel restrictions and no longer requiring quarantine for travelers returning from Guam
- CDC lowering US's COVID-19 alert level
- Taiwan lift ban on group tours

Airline	Aircraft	Seat Capacity per Flight	Frequency	Total Estimated Seat Capacity
China Airlines	737-800	158	2x weekly / 4x weekly	12,473
EVA Air/Starlux Airlines	A320/A321neo	177/188	2x weekly	6,373

## Airlines Schedule



### CI March Operation Schedule :



Location						
North America	Southeast Asia		Europe	Oceania	Northeast Asia	China
Los Angeles	Bangkok	Ho Chi Minh City	Amsterdam	Sydney	Nagoya	Beijing
Ontario	Singapore	Hanoi	Frankfurt	Melbourne	Tokyo	Shanghai
San Francisco	Jakarta	Manila	London (Heathrow)	Auckland	Osaka	Xiamen
Vancouver	Kuala Lumpur	Phnom Penh		Palau	Fukuoka	Chengdu
	Penang	Yangon		Brisbane	Seoul	Hong Kong

Flight schedule and numbers arranged based on pandemic

### CI April Operation Schedule :



Location						
North America	Southeast Asia		Europe	Oceania	Northeast Asia	China
Los Angeles	Bangkok	Ho Chi Minh City	Amsterdam	Sydney	Nagoya	Beijing
Ontario	Singapore	Hanoi	Frankfurt	Melbourne	Tokyo	Shanghai
San Francisco	Jakarta	Manila	London (Heathrow)	Auckland	Osaka	Xiamen
Vancouver	Kuala Lumpur	Phnom Penh	Vienna	Palau	Fukuoka	Chengdu
	Penang	Yangon		Brisbane	Seoul	Hong Kong

Flight schedule and numbers arranged based on pandemic


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## Airlines Schedule



	From	To	Frequency
	Taipei	Shanghai, Seoul, Singapore, Hong Kong LA, BKK, Jakarta, Tokyo, San Francisco, New York Manila, Osaka, Seattle Hanoi, Paris, Vancouver	4 flights per week 3 flights per week 2 flights per week 1 flight per week

	From	To	Frequency
	Taipei	Macau Penang Bangkok Osaka Tokyo Kuala Lumpur Ho Chi Minh City Manila Singapore	TUE, WED, THU, FRI WED, SAT WED, SAT, SUN TUE, FRI FRI TUE, FRI WED, SAT MON, WED, SAT THU, SAT

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- Mr. Brian Borja reported the following Japan market updates, on behalf of the GVB Japan marketing team.

## JAPAN MARKET CONDITIONS



### • Infections per 100,000 people (Cumulative count for the last 7 days)

2/12-2/18

Japan	Hawaii	Thailand	Korea	Taiwan	Australia
448.6	222.7	164.9	1,098.4	1.7	619.8

Data calculated based on data from Johns Hopkins University, USA.

### • The situation in Japan

- ✓ The number of infected people is starting to decrease.  
In Tokyo, the number of infected people has been decreasing for nine days in a row compared to last week, and we are starting to see a change.
- ✓ On February 17, the Japanese government announced that it plans to relax immigration regulations starting March 1.

#### Nationwide

##### 1st shot

101,571,281  
(80%)

#### Nationwide

##### 2nd shot

100,062,531  
(79%)

#### Nationwide

##### 3rd shot

16,009,146  
(12.6%)

Created based upon data from Prime Minister's Office of Japan 2/17



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## TRAVEL RESTRICTIONS : JAPAN



On February 17, the prime minister said,  
"We will begin to make gradual steps toward the exit,  
maintaining the strictest standards of the G7, but gradually  
easing the content of the waterfront measures."

### Key points for mitigation of waterfront measures

#### Quarantine period after entry

- 1) The quarantine will be lifted if the test is negative on 3<sup>rd</sup> day.
- 2) Exemption from quarantine under the condition of the country of stay and 3rd vaccination.

#### Maximum number of persons entering the country per day

Expanded from 3,500 to 5,000 people

#### New entry of foreign nationals

Business travelers, technical trainees, and foreign students are allowed.  
Tourists are excluded.

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## PACKAGE SALES



	Package Tours		FIT
	×	Resumed on April 1	●
	×	Resumed on April 1	●
	×	Resumed on April 1	●
	×	Resumed on June 1	●
	×	Resumed on April 1	●
	×	Resumed on March 16	●
	×	Resumed on April 1	●

Created based upon data from Official announcements on each company's website

## TRAVEL RESTRICTIONS : JAPAN



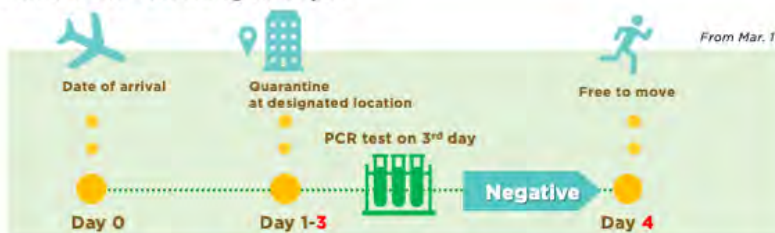
### ◆ Entry protocols for competing regions

From Feb. 21

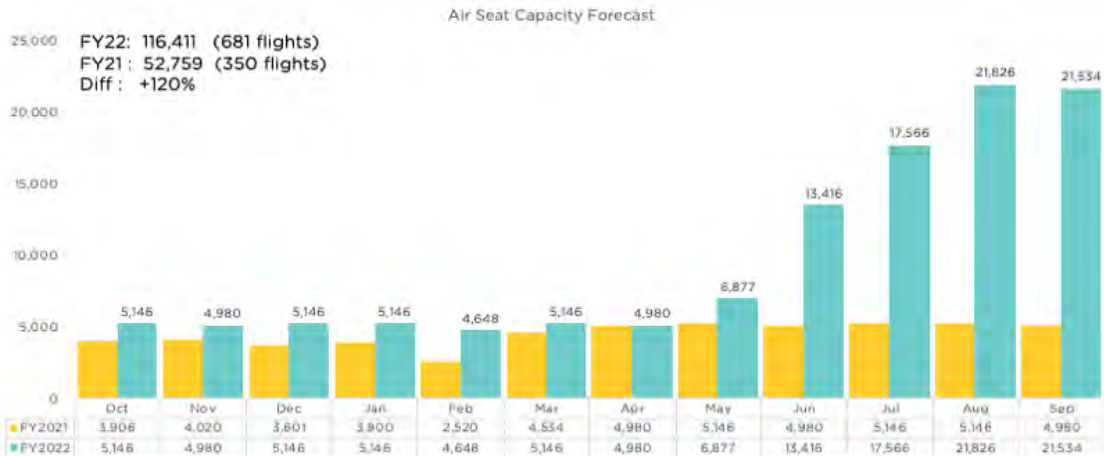
	Hawaii	Thailand	South Korea	Taiwan	Australia
Acceptance of JP tourists	●	●	×	×	●
Vaccination certificate	Needed	Needed	-	-	Needed
Negative certificate	Within 24 h	Within 72 h	-	-	Within 72 h
Quarantine	Exemption	Exemption	-	-	Exemption
Other requirements	-	Obligation to join the program	-	-	-

### ◆ Quarantine after returning to Japan

From Mar. 1



## AIR CAPACITY FORECAST



2/21/2022

AIR SERVICE DEVELOPMENT COMMITTEE MEETING

Confidential and subject to change.

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## FLIGHT OPERATION



AIRLINES	STATUS	FLIGHT	DEPARTURE	JPN TO GUM	FLIGHT	GUM TO JPN	FREQUENCY	CAPACITY
UNITED	Suspended until March 26, 2022	UA827	NRT	11:15 / 16:05	UA828	6:55 / 9:55	Daily	166
	Available	UA197	NRT	17:30 / 22:20	UA196	13:05 / 16:05	Daily	166
	Suspended until March 26, 2022	UA874	NRT	21:05 / 14:5 +1	UA873	17:05 / 19:50	Daily	166
	Suspended until March 26, 2022	UA136	NGO	11:20 / 15:55	UA137	7:30 / 10:20	Daily	166
	Suspended until March 26, 2022	UA172	NGO	20:50 / 12:5 +1	UA171	17:00 / 19:55	Daily	166
	Suspended until March 26, 2022	UA150	KIX	11:05 / 15:45	UA151	7:10 / 10:10	Daily	166
	Suspended until March 26, 2022	UA178	KIX	20:50 / 12:0 +1	UA177	16:50 / 19:50	Tue, Thu, Sat	166
	Suspended until March 26, 2022	UA166	FUK	11:50 / 16:50	UA165	07:40 / 10:50	Daily	166
JAL	Suspended until May 31, 2022	JL941	NRT	9:30 / 14:15	JL942	16:50 / 19:35	Daily	189
t'way	Suspended until March 31, 2022	TW311	KIX	10:45 / 15:10	TW312	16:10 / 19:00	Daily	189
JEJUair	Suspended until March 31, 2022	7C3174	KIX	10:10 / 14:50	7C3173	15:50 / 18:20	Daily	189
		7C3184 (Tue)		10:10 / 14:50	7C3183 (Fri)	15:50 / 18:20		

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## AIRLINES MARKET INTELLIGENCE REPORT



- MoFA level 1 -2 to increase from NRT and resume flight from KIX/ NGO



- Resume flight to coincide with the start of group package sales at travel agencies.



- Started contacting with commercial division and scheduled meeting with network team - under schedule coordination

2/21/2022

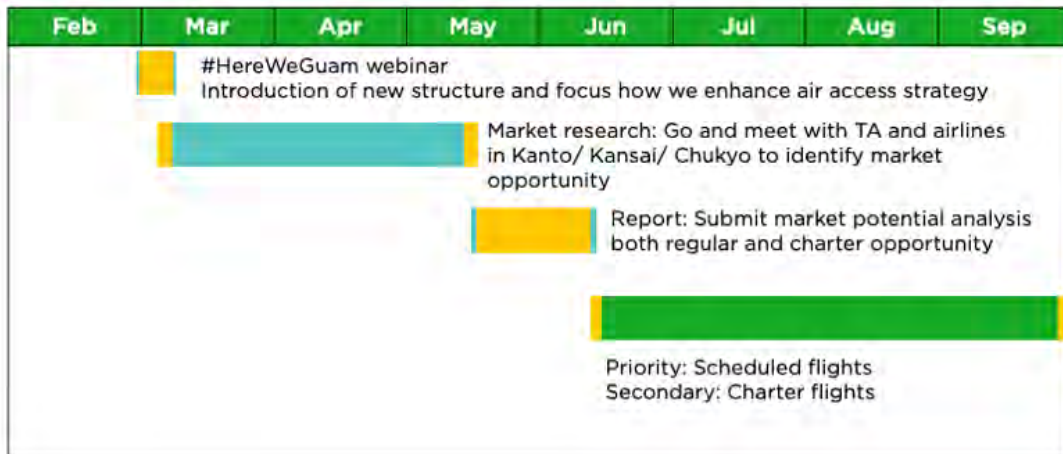
AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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## JAPAN TRADE UPDATE



GVB Japan has restructured its team and assigned an air access specialist to exclusively work on an air access strategy.



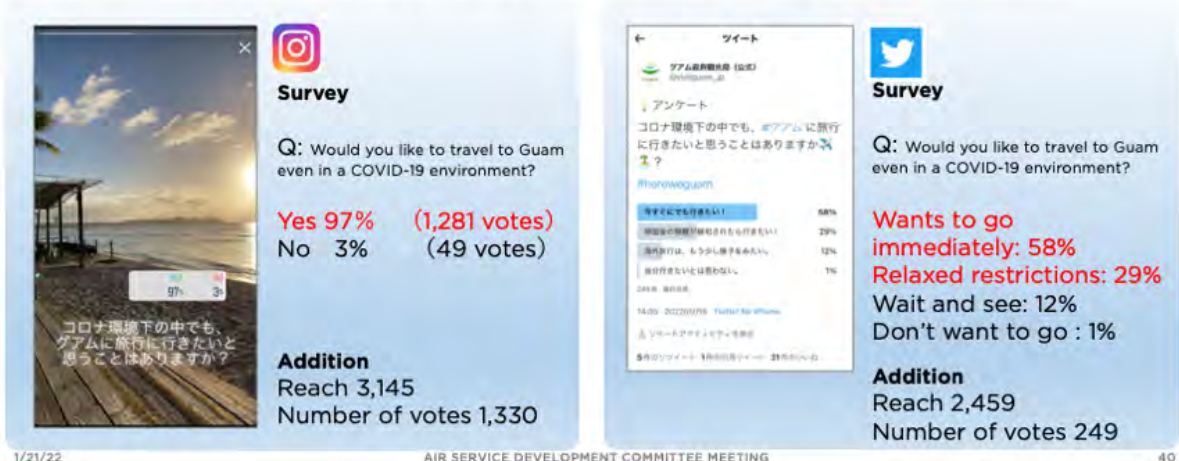
39



## CONSUMER SENTIMENTS



GVB Japan conducted a survey on Instagram and Twitter.  
Survey shows that many followers want to travel to Guam, even in a COVID-19 environment.



- Korea Marketing Manager Ms. Colleen Cabedo reported the following updates.

## AIRLINES MARKET INTELLIGENCE REPORT



### COMMUNICATION WITH AIRLINES

Airline	Issue	Discussion
Korean Air	<ul style="list-style-type: none"> <li>Promote Korean Air Flights (2x a week)</li> <li>Promotion dates: February 7 – March 31, 2022</li> <li>Plan to operate ICN-GUM daily flight from April</li> <li>Merger of Korean Air - Asiana Airlines in progress (conditional approval by Fair Trade Mission)</li> </ul>	<ul style="list-style-type: none"> <li>Korean Air opened special promotion page on their website.</li> <li>Provide 5% discount for Guam air ticket.</li> <li>Provide Guam luxurious hotel discounts to those who purchase Guam air ticket during the promotion period.</li> <li>Also, conduct raffle event to provide free hotel accommodations and gift vouchers to event winners.</li> <li>Exposed Guam logo on the promotion page.</li> </ul>
T'way	<ul style="list-style-type: none"> <li>Currently, no flight services from KOR-GUM</li> <li>Plan to operate ICN-GUM flight (2x a week) from March</li> <li>Promotion dates: March or April (postponed)</li> </ul>	<ul style="list-style-type: none"> <li>T'way to film promotional video about the overseas trip procedure in a step-by-step phase in order to guide customers who are planning to travel Guam in Living with COVID-19 era.</li> <li>T'way to open special promotion page on their website and expose the video.</li> <li>Provide Guam air ticket with special price and provide discount coupons (rental car, optional tours, duty free shop)</li> <li>Exposed Guam logo on the promotion page.</li> </ul>
Jin Air	<ul style="list-style-type: none"> <li>Currently operate ICN-GUM flight (2x a week)</li> <li>Plan to operate ICN-GUM daily flight from April, PUS-GUM flight (2x a week) from June</li> <li>Promote Jin Air Flights (2x a week)</li> <li>Promotion dates: March (postponed)</li> </ul>	<ul style="list-style-type: none"> <li>Jin Air to open Guam website promotion page for Guam ticket sales</li> <li>Provide an opportunity to get 90% discount code for round trip to Guam (Randomly pick one winner per day during the promotion period)</li> <li>Also, provide \$200 that can be used for accommodation, rental car, or optional tours, etc.</li> <li>Exposed Guam logo on the promotion page.</li> </ul>

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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# AIRLINES MARKET INTELLIGENCE REPORT



## COMMUNICATION WITH AIRLINES

Airline	Issue	Discussion
Jeju Air	<ul style="list-style-type: none"> <li>Currently, no flight services from KOR-GUM</li> <li>Plan to operate ICN-GUM flight (2x a week) from March 31 and gradually increase services</li> </ul> <p>[Promotion 1]</p> <ul style="list-style-type: none"> <li>Promote Jeju Air Flights (2x a week)</li> <li>Promotion dates: March or April (postponed)</li> </ul> <p>[Promotion 2]</p> <ul style="list-style-type: none"> <li>Place display ads and early bird promotion</li> <li>Promotion dates: Feb 23 – Mar 22</li> <li>Plan to expand routes to short haul destinations after integration of KE &amp; OZ</li> </ul>	<p>[Promotion 1]</p> <ul style="list-style-type: none"> <li>Jeju Air to open special promotion page on their website.</li> <li>Provide ticket discount and giveaways.</li> <li>Conduct SNS event through Instagram</li> <li>Display online banner on duty free shops and place ads at Gimpo Airport and Hengdae Inn Express hotel</li> <li>Exposed Guam logo on the promotion page.</li> </ul> <p>[Promotion 2]</p> <ul style="list-style-type: none"> <li>Jeju Air to open website promotion page on their website for early bird promotion</li> <li>Place display ads and link to sales page to promote Guam and generate sales.</li> </ul>
Air Busan	<ul style="list-style-type: none"> <li>Currently, no flight services from PUS-GUM</li> <li>Plan to operate PUS-GUM flight (2x a week) from April gradually increase services</li> <li>Promote Air Busan Flights (2x a week)</li> <li>Promotion dates: March 2022 (postponed)</li> </ul>	<ul style="list-style-type: none"> <li>Air Busan to open special promotion page on their website.</li> <li>OOH advertisement in Busan and Youngnam area</li> <li>Exposed Guam logo throughout the promotion.</li> </ul>

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# UPDATE AIRLINES SCHEDULE



## AIRLINE SCHEDULE - FEBRUARY

\* Incheon - Guam

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	THU/SUN	9:00	14:20	2,208
Jin Air	LJ641	FEB 4,11,18,25	9:35	14:50	756
<b>TOTAL</b>					<b>2,964</b>



**TOTAL OUTBOUND SEAT CAPACITY (FEBRUARY): 2,964 SEATS**

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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## UPDATE AIRLINES SCHEDULE



### AIRLINE SCHEDULE - MARCH

• Incheon - Guam

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	THU/SUN	9:00	14:20	2,484
Jeju Air	7C3102	THU/SUN (Mar 31-)	9:00	14:30	189
Jin Air	LJ641	TUE/FRI	9:35	14:50	1,701
T'way	TW301	WED/SAT (Mar 16-)	18:00	23:30	945
Air Seoul	RS101	THU/SUN (Mar 27-)	20:45	02:15(+1)	390
	RS103	WED/SAT (Mar 30-)	09:50	15:10	195
<b>TOTAL</b>					<b>5,904</b>



**TOTAL OUTBOUND SEAT CAPACITY (MARCH): 5,904 SEATS**

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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## UPDATE AIRLINES SCHEDULE



### AIRLINE SCHEDULE - APRIL

• Incheon - Guam

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	Daily	9:00	14:20	8,280
Jeju Air	7C3102	THU/SUN	9:00	14:30	1,512
Jin Air	LJ641	Daily	9:35	14:50	5,670
T'way	TW301	Daily	18:00	23:30	5,670
Air Seoul	RS101	THU/SUN	20:45	02:15(+1)	1,560
	RS103	WED/SAT	09:50	15:10	1,755
<b>TOTAL</b>					<b>24,447</b>

• Busan - Guam

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Air Busan	BX614	WED/SAT	08:05	13:05	1,980
<b>TOTAL</b>					<b>1,980</b>



**TOTAL OUTBOUND SEAT CAPACITY (APRIL): 26,427 SEATS**

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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## BEFORE OMICRON VS AFTER OMICRON



### • Incheon - Guam

\*Airline schedule is flexible, subject to change. As of February 21

ICN - GUM	FLIGHT NO.	FEB (BEFORE OMICRON)	FEB (AFTER OMICRON)	Growth (%)	MAR (BEFORE OMICRON)	MAR (AFTER OMICRON)	Growth (%)	APR (BEFORE OMICRON)	APR (AFTER OMICRON)	Growth (%)
KOREAN AIR	KE113	4,416	2,208	-50%	4,968	2,484	-50%	8,070	8,280	3%
JEJU AIR	7C3102	3,024	0	-100%	3,402	189	-94%	5,670	1,512	-73%
JIN AIR	LJ641	5,292	756	-86%	5,859	1,701	-71%	5,670	5,670	0%
T'WAY	TW301	5,292	0	-100%	5,859	945	-84%	5,670	5,670	0%
AIR SEOUL	RS101	1,560	0	-100%	1,755	390	-78%	5,850	1,560	-73%
AIR SEOUL	RS103	1,560	0	-100%	1,755	195	-89%	N/A	1,755	-
ASIANA AIR	OZ	1,504	0	-100%	1,692	0	-100%	5,640	0	-100%
ICN - GUM TOTAL		22,648	2,964	-87%	25,290	5,904	-77%	36,570	24,447	-33%

### • Busan - Guam

PUS - GUM	FLIGHT NO.	FEB	FEB	Growth (%)	MAR	MAR	Growth (%)	APR	APR	Growth (%)
JEJU AIR	7C3154	1,512	0	-100%	1,701	0	-100%	5,670	0	-100%
JIN AIR	LJ647	1,512	0	-100%	1,701	0	-100%	5,670	0	-100%
AIR BUSAN	BX614	1,760	0	-100%	1,980	0	-100%	6,600	1,980	-70%
PUS - GUM TOTAL		4,784	0	-100%	5,382	0	-100%	17,940	1,980	-89%

### • Korea - Guam

ICN - GUM	FLIGHT NO.	FEB (BEFORE OMICRON)	FEB (AFTER OMICRON)	Growth (%)	MAR (BEFORE OMICRON)	MAR (AFTER OMICRON)	Growth (%)	APR (BEFORE OMICRON)	APR (AFTER OMICRON)	Growth (%)
KOR - GUM TOTAL		27,432	2,964	-89%	30,672	5,904	-81%	54,510	26,427	-52%

## AIR SEAT PROJECTION



### FY2022 AIRLINE OPERATION PLAN

\*Airline schedule is flexible, subject to change.

ICN - GUM	FLIGHT NO.	CAPACITY	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
KOREAN AIR	KE111	276	3,998	4,524	2,349	0	0	0	0	0	0	0	0	0	10,871
KOREAN AIR	KE113	276	0	0	2,349	4,968	2,208	2,484	8,280	8,556	8,280	8,556	8,556	8,280	62,517
JEJU AIR	7C3102	189	0	378	756	378	0	189	1,512	3,213	5,670	5,859	5,859	5,670	29,484
JIN AIR	LJ641/771	189	1,512	1,890	1,890	1,134	756	1,701	5,670	5,859	5,670	5,859	5,859	5,670	43,470
T'WAY	TW301	189	945	1,480	756	0	0	945	5,670	5,859	5,670	5,859	5,859	5,670	38,713
AIR SEOUL	RS101	195	0	0	0	0	0	390	1,560	1,755	1,755	6,045	6,045	5,850	23,400
AIR SEOUL	RS103	195	0	0	0	0	0	195	1,755	1,560	1,755	0	0	0	5,265
ASIANA AIR	OZ607	188	0	0	0	0	0	0	0	0	0	0	0	0	0
ICN - GUM TOTAL			6,455	8,272	8,100	6,480	2,964	5,904	24,447	26,802	28,800	32,178	32,178	31,140	213,720

PUS - GUM	FLIGHT NO.	CAPACITY	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
JEJU AIR	7C3154	189	0	0	0	0	0	0	0	0	1,512	1,701	1,512	1,701	6,426
JIN AIR	LJ647	189	0	0	0	0	0	0	0	0	1,701	2,457	2,646	2,268	9,072
AIR BUSAN	BX614	220	0	0	880	1,100	0	0	1,980	1,980	1,760	3,960	3,740	3,740	19,140
PUS - GUM TOTAL			0	0	880	1,100	0	0	1,980	1,980	4,973	8,118	7,898	7,709	34,638

KOR - GUM	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
KOR - GUM TOTAL	6,455	8,272	8,980	7,580	2,964	5,904	26,427	28,782	33,773	40,296	40,076	38,849	248,358
KOR - GUM ACTUAL ARRIVAL	995	3,652	1,421	841									6,909
LF %	15%	44%	16%	11%	0%	0%	0%	0%	0%	0%	0%	0%	3%



FY2022 TOTAL SEAT CAPACITY (KOR-GUM): 248,358 SEATS

# AIR SEAT PROJECTION



## CY2022 AIRLINE OPERATION PLAN

\*Airline schedule is flexible, subject to change.

ICN - GUM	FLIGHT NO.	CAPACITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOREAN AIR	KE111	276	0	0	0	0	0	0	0	0	0	8,556	8,280	8,556	25,392
KOREAN AIR	KE113	276	4,968	2,208	2,484	8,280	8,556	8,280	8,556	8,556	8,280	8,556	8,280	8,556	85,560
JEJU AIR	7C3102	189	378	0	189	1,512	3,213	5,670	5,859	5,859	5,670	5,859	5,670	5,859	45,738
JIN AIR	LJ641/771	189	1,134	756	1,701	5,670	5,859	5,670	5,859	5,859	5,670	5,859	5,670	5,859	55,566
T'WAY	TW301	189	0	0	945	5,670	5,859	5,670	5,859	5,859	5,670	5,859	5,670	5,859	52,920
AIR SEOUL	RS101	195	0	0	390	1,560	1,755	1,755	6,045	6,045	5,850	6,045	5,850	6,045	41,340
AIR SEOUL	RS103	195	0	0	195	1,755	1,755	0	0	0	0	0	0	0	5,265
ASIANA AIR	OZ607	188	0	0	0	0	0	0	0	0	0	0	0	0	0
ICN - GUM TOTAL			6,480	2,964	5,904	24,447	26,802	28,800	32,178	32,178	31,140	40,734	39,420	40,734	311,781

PUS - GUM	FLIGHT NO.	CAPACITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
JEJU AIR	7C3154	189	0	0	0	0	0	1,512	1,701	1,512	1,701	1,701	1,512	1,701	11,340
JIN AIR	LJ647	189	0	0	0	0	0	1,701	2,457	2,646	2,268	2,457	2,457	2,457	16,443
AIR BUSAN	BX614	220	1,100	0	0	1,980	1,980	1,760	3,960	3,740	3,740	3,960	3,740	3,740	29,700
PUS - GUM TOTAL			1,100	0	0	1,980	1,980	4,973	8,118	7,898	7,709	8,118	7,709	7,898	57,483

KOR - GUM	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOR - GUM TOTAL	7,580	2,964	5,904	26,427	28,762	33,773	40,296	40,076	38,849	48,852	47,129	48,632	369,264
KOR - GUM ACTUAL ARRIVAL	841												
LF %	11%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%



CY2022 TOTAL SEAT CAPACITY (KOR-GUM): 369,264 SEATS

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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- Air Service Marketing Manager Mr. Brian Borja reported the following updates.

# RECOVERY INCENTIVES UPDATE



APPLICANTS



ROUTES



APPLICATION STATUS

- As reported, Guam's airline partners have reduced air service to our island, due to the omicron variant surges.
- We continue to keep an eye on recovery developments in order to support the demand for sales in the form of marketing co-ops, etc.

BUDGET

Program funding is being confirmed: \$2.7M

For existing program support: \$1.7M

Special program for Taiwan: \$1.0M

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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**VI. OLD BUSINESS**

- None

**VII. NEW BUSINESS**

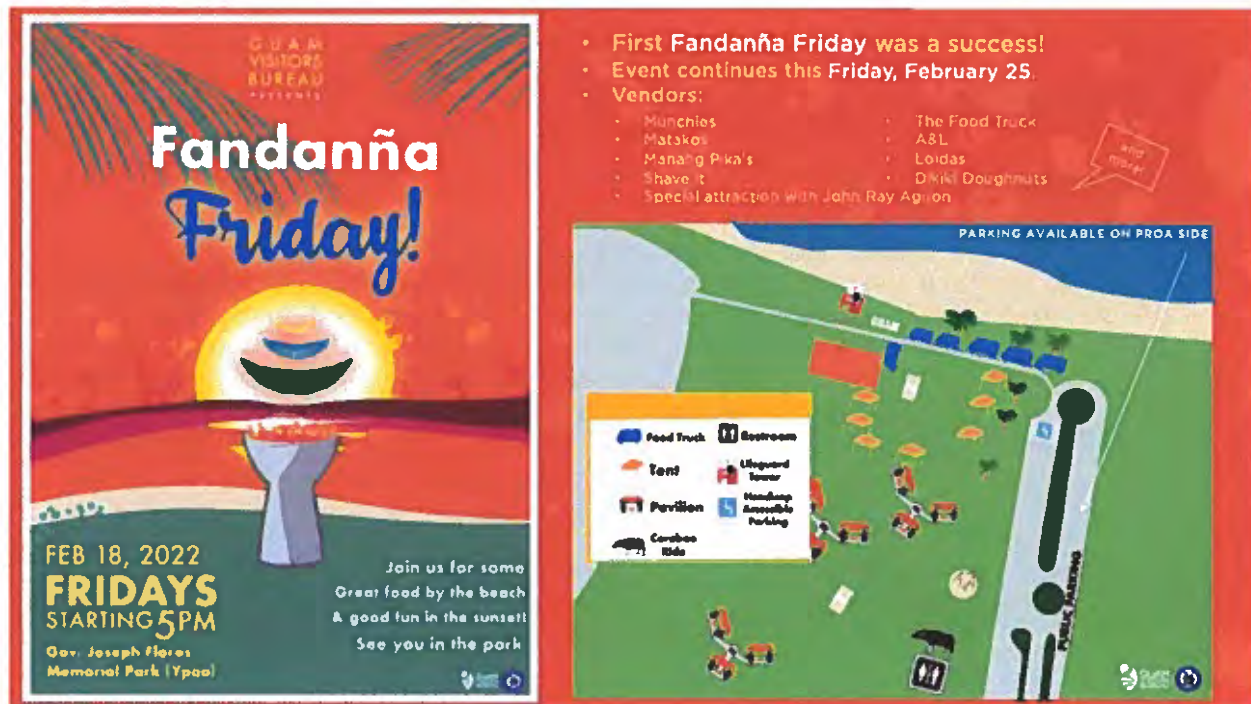
GIAA Marketing Administrator Rolenda provided the following update:

- International Arrivals Corridor (IAC): GIAA is one month in to the use of IAC for international arriving passengers; no glitches experienced during this pilot phase. What GIAA is concerned about is when transiting passengers will actually be allowed to go to the connecting gates straight upon arrival. Right now, Public Health still vets the connecting passengers from United's flights, so all the connecting passengers still go through Guam Customs. GIAA is looking forward to when Public Health will lift that vetting process – that will be the time transit passengers will enter directly into the concourse upon arrival – so we are looking forward to that passenger processing improvement. (whenever Public Health determines they no longer need to vet those transit passengers)
- Airlines Update
  - Asiana Airlines: received a response on a July 3<sup>rd</sup>, 2022 commencement date.
  - Marianas Southern Airways: 3xs a week service on a Cessna caravan aircraft (which is a 9-passenger aircraft) – to and from Guam and the Marianas.
- GIAA master plan consultants are in Guam assessing facility conditions and identifying the needs we have for future travel to include technologically advanced equipment. We are discussing biometric exit equipment; right now, everybody is being captured by the biometric entry system in U.S. Customs & Border Protection, and it is up to the airport operator and the airline users to implement an exit system to capture biometrics of all our international visitors. While we have this lull in traffic we are doing our best to improve our services and make it more efficient and seamless for the passenger.

**VIII. ANNOUNCEMENTS**

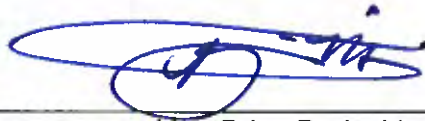
- Next ASD Committee Meeting: March 29, 2022 at 10:00am





**IX. ADJOURNMENT**

- Ms. Rolenda motioned to adjourn the meeting. Meeting adjourned at 10:51am.



Minutes prepared by: Brian Borja, Marketing Manager - Air Service Development



Minutes approved by: Nadine Leon-Guerrero, Director of Global Marketing