

AIR SERVICE DEVELOPMENT (ASD) COMMITTEE MEETING
03:30 PM | TUESDAY, April 5, 2022
GVB Main Conference Room and virtually via GoToMeeting

ATTENDANCE (*Participated virtually)

Members/Allied Partners Present:

1. Milton Morinaga, GVB Board Chairman, ASD Committee Chairman, PHR Ken Micronesia
2. Letitia Law-Byerly, Marketing Manager, Lotte Duty Free*

GVB Management/Staff Present:

1. Brian Borja, Marketing Manager – Air Service
2. Gabryel Franquez, Marketing Manager – Taiwan
3. Elaine Pangelinan, Acting Director of Global Marketing
4. Regina Nedlic, Marketing Manager – Japan
5. Mai Perez, Marketing Coordinator - Japan
6. Sharlene Guerrero, Marketing Manager - Philippines*
7. Erik Salvador, Marketing Coordinator – Philippines*
8. Mark Manglona, Marketing Manager North America & Pacific*
9. Nicole Benavente, Marketing Coordinator – Taiwan*
10. Brayan Simsiman, Tourism Research Analyst*
11. Shoji Nobuyoshi, GVB Japan*
12. Felix Yen, GVB Taiwan*
13. Brian Cha, Web & IT Coordinator Assistant
14. AJ Rosario, Web & IT Coordinator

Guests Present:

1. Haidee Eugenio Gilbert, The Guam Daily Post*

AGENDA

I. CALL MEETING TO ORDER

- Chairman Milton Morinaga called the meeting to order at 3:35pm.

II. APPROVAL OF PREVIOUS MEETING MINUTES – February 22, 2022

- Ms. Letitia Law-Byerly made the first motion to approve the minutes of the previous meeting. Meeting minutes approved as written.

III. REPORT OF THE CHAIRMAN

- Recently saw on KHON2 (Hawaii) news that Koreans are heading and it is being labeled “revenge tours,” because of all the time they couldn’t travel, they saved up enough funds to travel.
- We hope they have that same type of movement (to Guam).
- We get to see some light at the end of the tunnel, where everybody is relaxing.
- Unfortunately, Japan is still very cautious about opening the border. They are slowly but surely opening, initially with the Japanese nationals. Tourists are not yet allowed, but business and student related (travelers) are allowed to enter Japan with the visa.

- With Japan relaxing the travel warning from 3 to 2 will give more reason for the travel agent to freely sell their package tour. They call it a dynamic tour, meaning it is ala carte where they choose their own hotel, airlines and make a package themselves.
- Guam is looking forward to more travel out of Japan and Korea in the next three months, where things will happen.

IV. REPORT OF MANAGEMENT

- Proceeded to present market updates.

V. MARKET UPDATES

- Tourism Research presented by Air Service Development Marketing Manager Brian Borja.

VISITOR ARRIVALS



Market	FY2019	FY2020	FY2021	FY2022*
Japan	664,784	324,574	3,454	2,784
Korea	734,339	325,109	2,063	7,641
Taiwan	28,346	10,691	2,253	127
China	12,588	4,287	124	102
US/Hawaii	94,141	48,263	41,239	26,636
Philippines	20,708	9,344	2,262	1,838
Hong Kong	6,395	1,226	31	18
Other	59,653	28,368	9,257	6,670
TOTAL	1,631,049	757,385	61,607	45,816
Growth vs. LY	6.9%	-53.6%	-91.9%	

Source: Guam Customs and Declarations Form processed by the Guam Visitors Bureau.
Note*: Preliminary FY 2022 arrivals as of March 20, 2022.

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SEAT CAPACITY MARCH - JUNE 2022



Market	March	April	May	June	TOTAL
Japan	5,146	4,980	12,333	36,872	59,331
Korea	4,653	9,671	30,386	31,982	76,692
Taiwan	-	-	-	3,060	3,060
China	-	-	-	-	-
US/Hawaii	10,850	10,500	10,850	10,500	42,700
Philippines	8,330	9,358	10,519	10,950	39,157
Hong Kong	-	-	-	-	-
Other	8,134	8,466	8,466	13,944	39,010
TOTAL	37,113	42,975	72,554	107,308	259,950

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of March 28, 2022.

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SEAT CAPACITY



Market	FY2019	FY2020	FY2021	FY2022
Japan	860,553	551,901	139,321	231,349
Korea	857,149	612,617	160,974	230,485
Taiwan	40,272	20,382	4,882	12,600
China	-	-	-	-
US/Hawaii	133,588	133,224	127,512	127,750
Philippines	151,820	98,560	45,383	107,952
Hong Kong	31,350	922	-	-
Other	175,646	99,216	52,744	126,326
TOTAL	2,250,378	1,516,822	530,816	836,462
Growth vs. LY	6.2%	-32.6%	-65.0%	57.6%

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of March 28, 2022.

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JAPAN SEAT CAPACITY



Airline	FY2019	FY2020	FY2021	FY2022
United	449,888	275,460	52,162	175,130
JAL	116,144	53,610	597	24,278
Delta	-	-	-	-
Korean Air	-	-	-	-
Tway Air	140,427	-	13,041	28,917
Jeju Air	136,080	149,877	73,521	3,024
Jin Air	5,103	72,954	-	-
Uzbekistan	-	-	-	-
Air Busan	12,285	-	-	-
China Airlines	626	-	-	-
TOTAL	860,553	551,901	139,321	231,349
Growth vs LY	20.4%	-35.9%	-74.8%	66.1%

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of March 28, 2022.

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KOREA SEAT CAPACITY



Airline	FY2019	FY2020	FY2021	FY2022
Jeju Air	223,587	283,836	124,020	30,620
Air Busan	52,333	36,718	440	13,940
Korean Air	208,974	109,195	3,037	86,814
Jin Air	223,992	101,655	15,876	44,037
Tway Air	74,088	40,068	16,821	34,209
Air Seoul	74,175	41,145	780	20,865
Asiana Airlines	-	-	-	-
TOTAL	857,149	612,617	160,974	230,485
Growth vs LY	-2.3%	-28.5%	-73.7%	43.2%

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of March 28, 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	-	-
TOTAL	151,820	98,560	45,383	107,952
Growth vs LY	4.1%	-35.1%	-54.0%	137.9%

Source: Dilo MI: Marketing Intelligence for the Aviation Industry as of March 28, 2022.

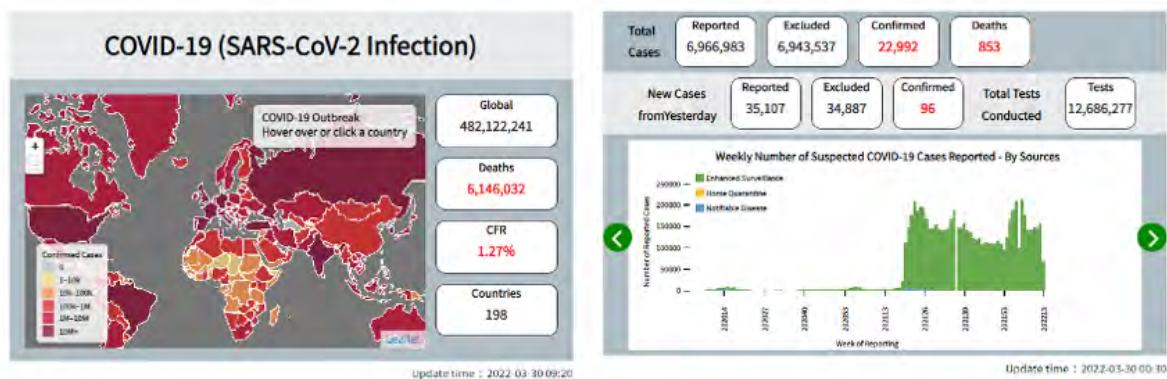
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- Taiwan (R.O.C) update presented by Taiwan Marketing Manager Gabryel Franquez.

TAIWAN MARKET CONDITIONS



GLOBAL PANDEMIC CONDITIONS



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TAIWAN MARKET CONDITIONS



As of March 30:

FDA/WHO approved

Vaccine Maker	2 nd Dose/ Fully Vaccinated	1st Dose
AstraZeneca	7.13M (30.59%)	8.05M (34.55%)
moderna	4.23M (18.16%)	4.11M (17.67%)
Pfizer	6.09M (26.13%)	6.41M (27.5%)
MEDIGEN	0.78M (3.36%)	0.85M (3.68%)



2nd dose/fully vaccinated: **78.24%**

1st dose: **83.39%**

Not vaccinated < 12 years old	2.29M (9.85%)
Not vaccinated > 12 years old	1.57M (6.77%)

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Updated Travel Entry Protocols



Restrictions on Entering Taiwan-1/4-Taiwan Nationals, Foreign Nationals (starting March 7, 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 ^{note1}
Traveler Type	Credential	Eligible to Enter Taiwan?	Requirement
Foreign National	Holder of ARC (Resident visa not included)	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 ^{note1}
	Non-ARC holder	Yes	2. strengthened quarantine measures ^{note1}
	All others	No	
Note: <ol style="list-style-type: none"> All travelers are required to undergo 10-day quarantine after arrival. (the day of arrival counts as Day 0; a 7-day self-health management will be required starting the 11th day.) 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. Effective 00:00 am, May 19, 2021, transit via Taiwan is temporarily suspended. Personnel on diplomatic /government official business, migrant workers, <u>students</u>, should follow instructions by Ministry of Foreign Affairs, Ministry of Labor, and Ministry of Education. 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://hdhg.mohw.gov.tw/) Show confirmation message to quarantine staff. The confirmation message is required for entering Taiwan.			

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Updated Travel Entry Protocols



On February 24, CECC announced that quarantine for all arrivals will be reduced to 10 days starting on March 7, 2022

A. Required quarantine period and quarantine location:

- a. The number of days an arrival should quarantine will be shortened to 10 days, and the day of arrival counts as Day 0; a seven-day self-health management will be required starting the 11th day.
- b. The arrival should quarantine at home or a residence of his or her family or friends, and the principle of one person per residence should be observed.
- **If the principle of one person per residence cannot be followed, the arrival should complete the 10-day quarantine at a quarantine hotel.**
- c. Family members/household members who arrive on the same day may choose to quarantine together in their home or a residence of their friends or family or they may stay in the same quarantine quarter depending on their willingness and room types of the quarantine hotel where they stay.

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Updated Travel Entry Protocols



B. Testing measures:

- a. PCR testing:
 - 1. Arrivals will undergo a PCR test upon arrival (Day 0) as currently required.
 - 2. Before the end of quarantine (the 10th day of quarantine), arrivals will undergo another PCR test at a hospital or a location arranged or designated by their local government. Those testing negative should continue to practice a seven-day self-health management after being released from quarantine.
- b. At-home rapid testing:
 - 1. At-home rapid tests: Starting on March 17, a COVID-19 rapid antigen self-test will be mandatory on the 2nd and 4th day of the seven-day self-health management period that follows quarantine or home isolation.



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Taiwan news



CECC to plan for 7-, 5-, 3-day quarantines for arrivals (Mar. 14, 2022)




- Taiwan's Health and Welfare Minister Chen Shih-chung said that planning of the country's COVID-19 response is moving in the direction of shorter quarantine periods.
- Speaking to reporters during a banquet hosted by the Taipei Hotel Association, Chen said the Central Epidemic Command Center will draft plans for quarantine periods of seven, five, and three days for arrivals to Taiwan.
- If the COVID-19 situation is stable in the coming month, a seven-day quarantine may be in the cards, though doing so may result in 3.5 percent of COVID-19-infected travelers going undetected, Chen said.






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Airlines Market Intelligence Report		
Airlines	GTO Contact	Updates
 CHINA AIRLINES	3/17 Solomon Lee, Vice President	<ul style="list-style-type: none"> CL Lee said that although China Airlines' June flight schedule may plan flights to Guam, it has not yet been confirmed since it still has to follow government's quarantine policies and still need to wait for CECC lift ban on group tours.
 EVA AIR 長榮航空	3/29 Amy Cho, Junior Vice President	<ul style="list-style-type: none"> Eva air Amy said that the scheduled flights will gradually increase a bit, and the island market still depends on government policies, especially the relaxation of Taiwan's quarantine rules.
 STARLUX 星宇航空	3/8 Ken Wang, Vice President Passenger Sales & Marketing Div. Joshua Chen, Director Passenger Sales Dept.	<ul style="list-style-type: none"> Starlux are optimistic about Guam's market after the relevant ban is lifted, and they also praised Guam's high media share of voice, mentioning that Guam has always been on their target list of future flight routes.

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Airlines Market Intelligence Report		
Competitor Updates		
Destination	Updates	
 Singapore	<ul style="list-style-type: none"> 3/24: Singapore will reopen its borders to all fully vaccinated travellers, removing all existing vaccinated travel lanes (VTL) and unilateral opening arrangements from Apr 1, the Civil Aviation Authority of Singapore announced on Thursday (Mar 24). 	
 Fiji	<ul style="list-style-type: none"> 3/25: Fiji will open its borders to all countries and remove quarantine requirements for vaccinated arrivals. Fijian Attorney-General Aiyaz Sayed-Khaiyum announced that from next month fully-vaccinated visitors would only be required to take a rapid antigen test for Covid-19 within 24 hours of arrival. 	
 Thailand	<ul style="list-style-type: none"> 3/22: Thailand plans to lift all pre-arrival testing requirements for all travelers from April 1st in a bid to attract more visitors. International visitors will no longer need to take a PCR test before arrival, although post-arrival testing and other measures will remain in place. 	

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Consumer Sentiments for Travel



- On GTO's Facebook Fan page and social media platforms, consumers can be seen expressing their desire to travel to Guam.
- For example, many consumers want to spend their honeymoon in Tumon Bay and enjoy performances at Fisheye Park.
- At the same time, consumers are very concerned about the quarantine policy, and they are looking forward to the direct flight to Guam. They hope that airlines can resume the Taiwan Guam route as soon as possible.



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Taiwan Market Overview



2022 Taiwan Travel and Air Service Market Prediction

- With the gradual increase in vaccine coverage, countries have successively reopened the border, making it no longer impossible for Taiwanese tourists to travel abroad in the second half of 2022. Liu Yuhui, general manager of Club Med Taiwan, said in an interview with Apple Daily News: "In 2022, overseas travel will be happening! I am confident that the Taiwan travel market will restart in the second half of 2022, and tourism will gradually reopen"
- Club Med conducted a "post-pandemic travel intention survey" of 468 respondents in Taiwan. The survey showed that nearly 90% of the people believe that traveling abroad is irreplaceable, and more than 60% of the people said that , will plan to travel abroad within half a year after reopening. Liu Yuhui said: "It can be seen that Taiwanese consumers have very high expectations for going abroad."



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Taiwan Market Overview



2022 Taiwan Travel and Air Service Market Prediction

- According to the "Google Asia-Pacific Travel Trend Insight Report", the travel mode in the post-pandemic era will no longer be "improvised travel".
- After the pandemic, travelers will pay more attention to safety and pre-trip planning, and are willing to increase their travel budget, extend travel time, and look for more single-site travel and in-depth travel with local characteristics.



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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	0	0	1,066	2,417	2,560	2,417	1,881	10,341
	EVA Air/Starlux Airlines	0	0	0	0	0	0	1,434	1,434	1,195	1,115	5,178
Total Seats		0	0	0	0	0	1,066	3,851	3,994	3,612	2,996	15,519

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
- 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	10,341
EVA Air/Starlux Airlines	A320/A321neo	177/188	2x weekly	5,178

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Airlines Schedule



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

CI May 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	Hong Kong Shanghai, LA, BKK, Jakarta, San Francisco, NY, Hanoi Manila, Osaka, Seattle, Tokyo, Seoul, Singapore 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	Daily WED, SAT WED, THU, SAT, SUN TUE, FRI FRI TUE, FRI WED, FRI, SAT MON, WED, SAT TUE, THU, SAT

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- Japan update presented by Japan Marketing Manager Regina Nedlic.

JAPAN MARKET CONDITIONS



COVID Case :
Nationwide: 29,881
Tokyo: 4,544
Osaka: 1,140
Aichi: 1,084
Fukuoka: 1,504

Nationwide :
3rd dose 49,062,000/ 39.0%
2nd dose 99,885,200/ 79.4%
1st dose 101,646,400/ 80.8%

Third shots by region :
Tokyo is the highest among major cities



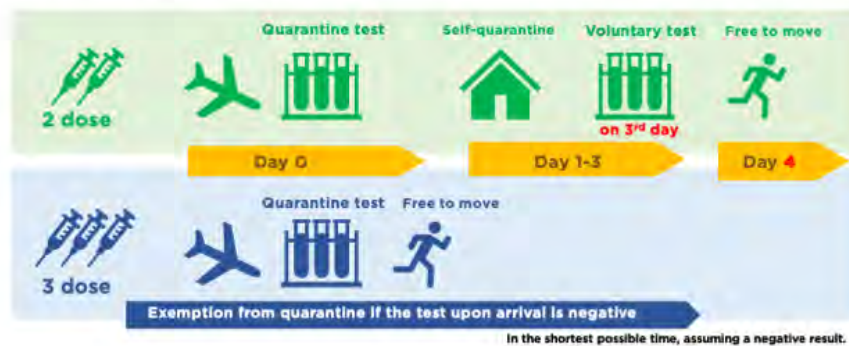
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ENTRY PROTOCOL



- As of March 1, those returning from the U.S. (including Guam) who have completed their third inoculation are exempt from quarantine if they are negative upon their return, while those who have completed their second or lower inoculation will be quarantined at home for 3 days.
- Effective April 1, the daily entry limit for new foreigners other than for tourism purposes will be relaxed to 10,000

Effective from March 1 for those returning to Japan



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- Ms. Regina added:
 - MOFA has changed the US to level 2 as of April 1st

- Accepting up to 10,000 foreigners into Japan; must have a visa and travel for business or student-related purposes

AIRLINE MARKET INTELLIGENCE REPORT








- Additional flights from May 7 - Jun 2, Sat and Sun total
- MoFA level 2 is to resume NRT GUM/ KIX GUM/ NGO GUM
- Working flight resumption support plan with Mkt/ Sales team under GoGo Campaign
- Condition to resume flight when MoFA level 2 abnd JALPAK/ JTB can start sell group/ package
- Resumption timing mid to end of Jul
- Require flight resumption support other than promotion
- Name of Carrier - undisclosed
- Guam is always top 5 target destination on network meeting
- Issues are; less business demand and ETOPS - A320/A321 system of maintenance
- Priority is profit-making on existing routes.
- But open to discussion

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- Ms. Regina added:
 - i. United
 1. Added more flights on Sat and Sun, which give an additional 11,000 seats
 2. As of April 1st, US has been changed from Level 3 to Level 2 (as reported)
 3. Osaka and Nagoya are still under discussion as to when they will resume; may be further into the month of June or July
 4. We are currently working with United and have several programs that are being launched currently as a result of the last board meeting where our budget has been approved moving into the 3rd and 4th quarter - more trade and airlines programs.
 5. We are working closely with United in our marketing and sales for the Gogo Campaign - 55th anniversary of first flight from Japan to Guam, taking place in the month of May.
 6. United will be coming to Guam sometime this week or the following week and will have more discussions with their sales team.
 - ii. JAL
 1. We are keeping in close contact with them.
 2. They have announced they will resume July 15; if not, at least the end of July

- iii. We are also reaching out to various LCCs that have been suggested by this committee and the Board. However, this is also still in-the-works right now, we are not wanting to share any names because we don't have any solid commitments. However, Guam has always been a part of their discussions. Our trades team has been doing very well in keeping close contact with all our partners and reaching out to them and sharing with them what is happening in Guam as well as our marketing and trade programs.

AIR CAPACITY FORECAST







Flight number	Port	Frequency	Full capacity	Monthly capacity	Apr.	May	Jun	Jul 15+	Aug	Sep	TTL
MoFA Level					Level 2			Level 1			
Target					Early adopters/ FIT			Summer break Group/ Package			
LF/ JP share					20%	30%	40%	70%	80%	70%	
UA827	NRT	Daily AM	166	4,980		199	1,992	1,743	3,984	3,486	11,404
UA197	NRT	Daily	166	4,980	996	1,484	1,992	3,486	3,984	3,486	15,438
UA874	NRT	Daily PM	166	4,980		199		1,743	3,984	3,486	9,412
UA136	NGO	Daily	166	4,980					3,984	3,486	7,470
UA172	NGO	Daily	166	4,980							0
UA150	KIX	Daily	166	4,980				1,743	3,984	3,486	9,213
UA178	KIX	3 times a week	166	1,992							0
UA 166	FUK	4 times a week	166	2,656					1,859	1,859	3,718
JL941	NRT	4 times a week	199	3,184				1,114	2,547	2,229	5,890
7C3147	KIX	Daily	180	5,400					4,320	3,780	8,100
TW311	KIX	Daily	180	5,400					4,320	3,780	8,100
TTL					996	1,693	3,984	9,829	32,966	29,078	78,547

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FLIGHT OPERATION



AIRLINES	STATUS	FLIGHT	DEPARTURE	JPN TO GUM	FLIGHT	GUM TO JPN	FREQUENCY	CAPACITY
UNITED 	Available from May 7, 2022 to June 2, 2022	UA 621	NRT	11:15 / 16:05	UA 628	6:55 / 9:55	Daily	166
	Available	UA 197	NRT	17:30 / 22:20	UA 196	13:05 / 16:05	Daily	166
	Available from May 9, 2022 to June 2, 2022	UA 674	NRT	21:05 / 14:5 +1	UA 673	17:05 / 19:50	Daily	166
	will resume on August 1, 2022	UA 136	NGO	11:20 / 15:55	UA 137	7:30 / 10:20	Daily	166
	will resume on October 1, 2022	UA 172	NGO	20:50 / 12:5 +1	UA 171	17:00 / 19:55	Daily	166
	will resume on July 5, 2022	UA 150	KIX	11:05 / 15:45	UA 151	7:10 / 10:10	Daily	166
	will resume on October 1, 2022	UA 178	KIX	20:50 / 12:0 +1	UA 177	16:50 / 19:50	Tue, Thu, Sat	166
	will resume on August 1, 2022	UA 166	FUK	11:50 / 16:50	UA 165	07:40 / 10:50	Daily	166
	will resume on July 5, 2022	JL 941	NRT	9:30 / 14:15	JL 942	16:50 / 19:35	Daily	199
	will resume on August 1, 2022	TW 311	KIX	10:45 / 15:10	TW 312	16:10 / 19:00	Daily	189
JAL 								
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JEJUair 	will resume on August 1, 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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JAPAN MARKET OVERVIEW



- Travel agents launch sales campaigns in anticipation of Go TO campaigns.
- Started prefectural residents' discount campaign by prefecture



- JATA is sending an overseas delegation to Hawaii as part of preparations for the resumption of overseas travel



- As a base case, we expect to return to around 40% in FY22, 65% in FY23 and 80% in FY24, reaching the FY19 level around FY25. After that, growth is expected to be at the same level as in the past (5% annual growth rate between FY15 and FY19).

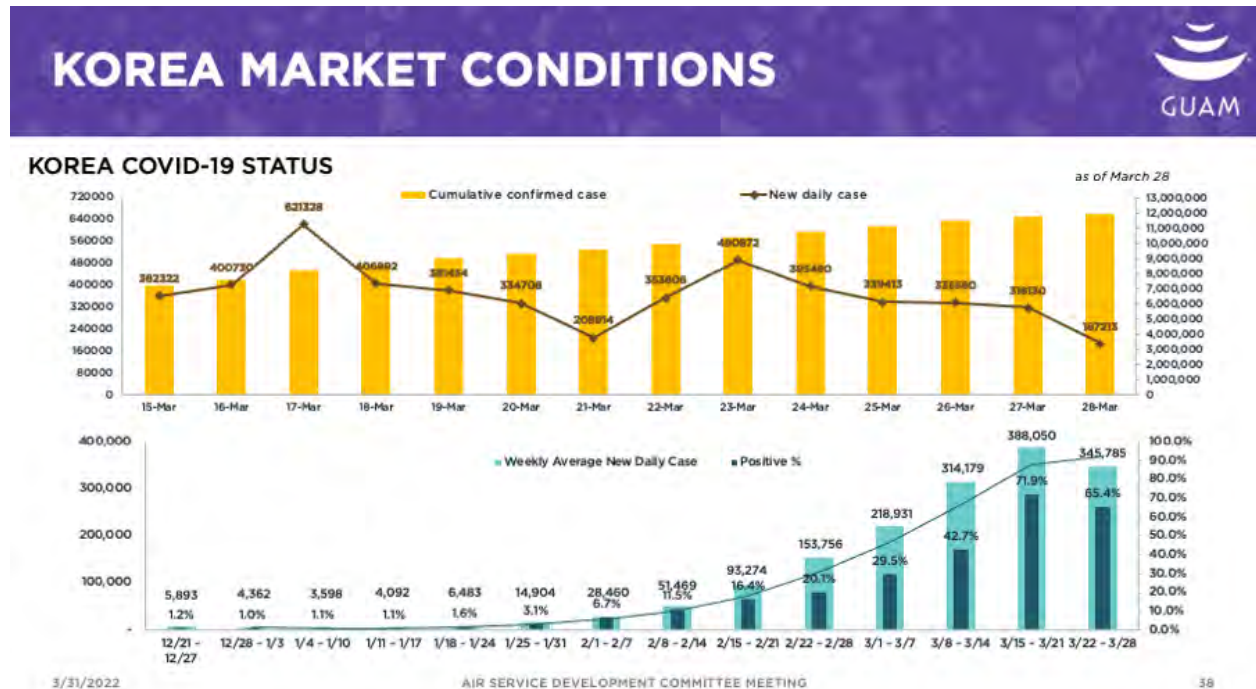
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- South Korea updated presented by Brian Borja on behalf of the marketing team as they are currently on their mission in Seoul.




KOREA MARKET CONDITIONS




COVID-19 SPECIFIC ISSUES (HIGHLIGHT)

01




- No vaccine pass system when entering restaurant, café, etc.
- People who have been in close contact with a COVID-19 patient is no longer need to quarantine regardless of their vaccination status starting March 1.

02



Govt. eased private gathering limit to 8 people, maintains business curfew 11p.m., effective March 21.

03



The government will begin vaccinating children aged 5-11 against COVID-19 from March 31.

The government also began administering a booster shot for teenagers aged 12-17 who completed their two-dose vaccination at least three months ago.

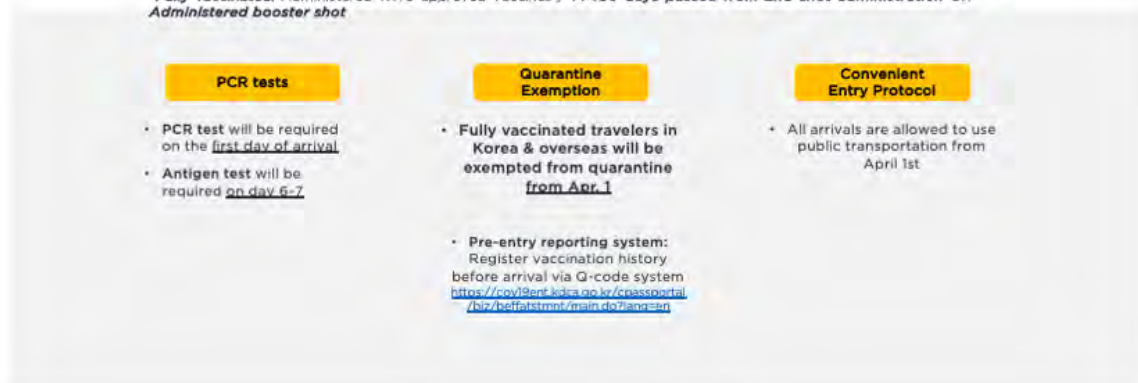
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TRAVEL ENTRY PROTOCOL



"Korea to extensively ease overseas arrival protocols: Exemption of 7-day quarantine for fully vaccinated travelers"

**Fully vaccinated: Administered WHO approved Vaccines / 14-180 days passed from 2nd shot administration OR Administered booster shot*



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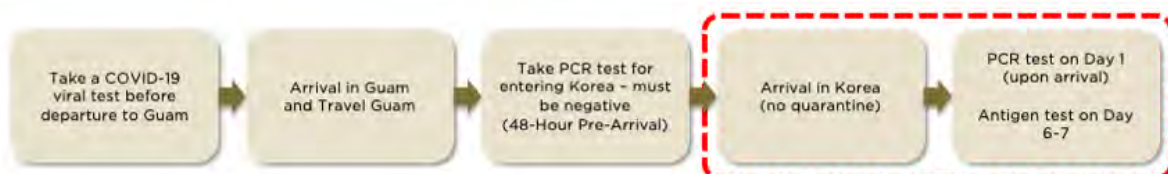
TRAVEL ENTRY PROTOCOL



April 1, 2022~



If I am Vaccinated in Korea (Nationals, Foreigners) or registered on COOV
If I am Vaccinated in overseas and registered vaccination history via Q-code (Foreigners): Q-code - Quarantine covid19 defence (kdca.go.kr)

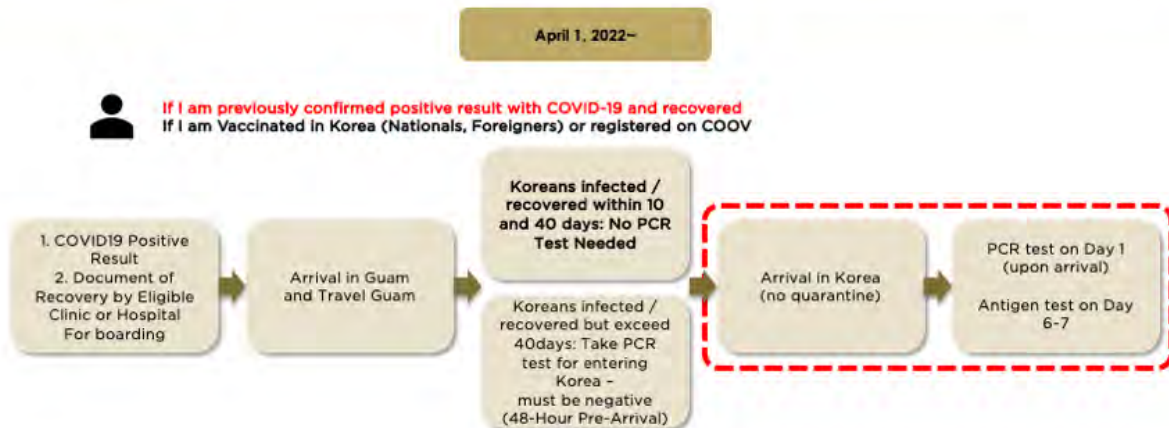


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TRAVEL ENTRY PROTOCOL





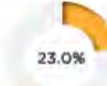

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AIRLINE MARKET INTELLIGENCE

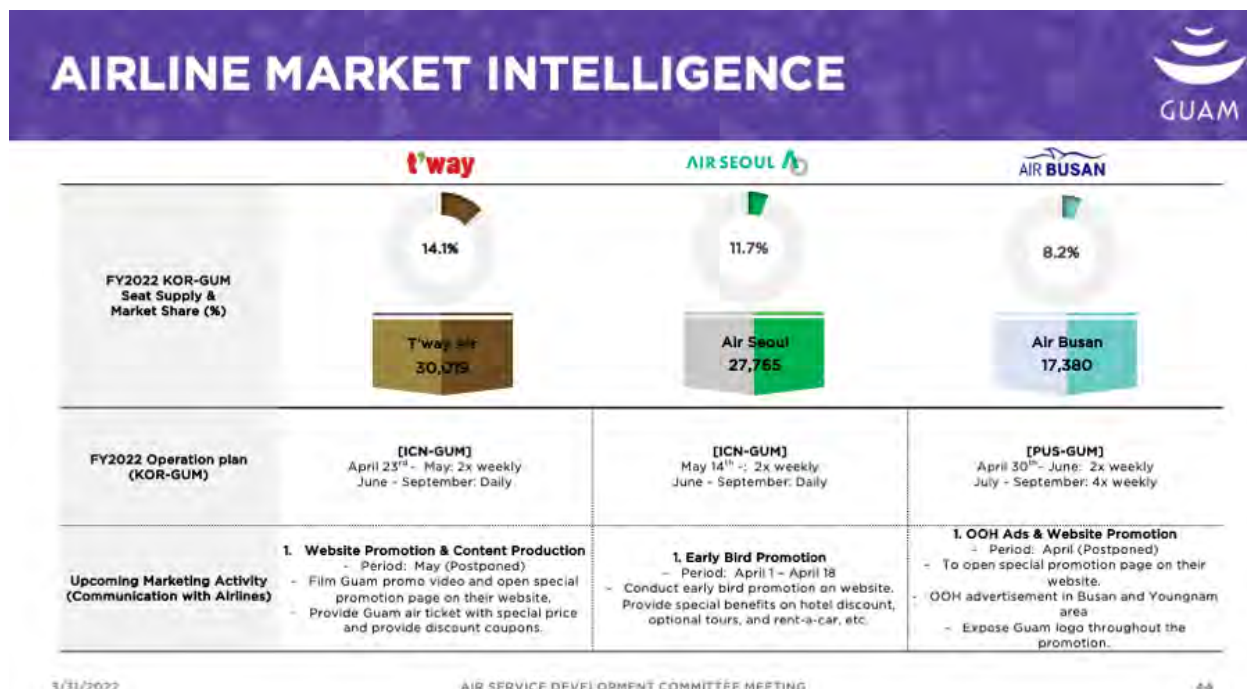


			
FY2022 KOR-GUM Seat Supply & Market Share (%)	 27.9% Korean Air 59,195	 23.0% Jin Air 48,762	 15.1% Jeju Air 32,130
FY2022 Operation plan (KOR-GUM)	[ICN-GUM] March - April: 2x weekly May - June: 4x weekly July - September: Daily	[ICN-GUM] March: weekly, April 15 th - May: 4x weekly June - September: Daily [PUS-GUM] April 16 th - June: 2x weekly July - September: 3x weekly	[ICN-GUM] May 1 st - 2x weekly June: 4x weekly July - September: Daily [PUS-GUM] May - September: 2x weekly
Upcoming Marketing Activity (Communication with Airlines)	1. Korean Air Sales Contest - Period: March 28 - May 13 - Target TAs: 15-20 TAs - TAs to focus on Guam product sales. To be provided incentive based on ticket sales. 2. Korean Air FAM Tour - Period: April 17 - 21 - No. of pax: approx. 12pax	1. Jin Air Busan FAM Tour - Period: April 16 - April 19 - No. of pax: approx. 23pax (TAs & Media)	1. Jeju Air Seoul Website Promotion - Period: March 24 - April 6 - Opened special promotion page on their website. - Provide ticket discount and giveaways. - Conduct SNS event through Instagram

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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SEAT CAPACITY FORECAST (FY)

ICN - GUM	FLIGHT NO.	CAPACITY	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
KOREAN AIR	KE111	269	3,998	4,524	2,349	0	0	0	0	0	0	0	0	0	10,871
KOREAN AIR	KE113	269	0	0	2,349	4,968	2,208	2,484	2,152	4,573	4,842	8,339	8,339	8,070	48,324
JEJU AIR	7C3102	189	0	378	756	378	0	0	0	1,701	3,402	5,859	5,859	5,670	24,003
JIN AIR	LJ641/771	189	1,512	1,890	1,890	1,134	756	945	2,646	3,402	5,670	5,859	5,859	5,670	37,233
TWAY	TW301	189	945	1,480	756	0	0	0	567	3,213	5,670	5,859	5,859	5,670	30,019
AIR SEOUL	RS101	195	0	0	0	0	0	0	0	0	0	0	0	0	0
AIR SEOUL	RS103	195	0	0	0	0	0	0	0	975	5,850	6,045	6,045	5,850	24,765
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	3,429	5,365	13,864	25,434	31,961	31,961	30,930	175,215
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	1,512	1,701	1,701	1,512	1,701	8,127
JIN AIR	LJ647	189	0	0	0	0	0	0	945	1,701	1,512	2,457	2,646	2,268	11,529
AIR BUSAN	BX614	220	0	0	880	1,100	0	0	220	1,980	1,760	3,960	3,740	3,740	17,380
PUS - GUM TOTAL			0	0	880	1,100	0	0	1,165	5,193	4,973	8,118	7,898	7,709	37,036
KOR - GUM TOTAL			6,455	8,272	8,980	7,580	2,964	3,429	6,530	19,057	30,407	40,079	39,859	38,639	212,251
KOR - GUM ACTUAL ARRIVAL			995	3,652	1,421	841	311								7,220
LF %			15%	44%	16%	11%	10%								

FY2022 TOTAL SEAT CAPACITY FORECAST (KOR-GUM): 212,251 SEATS

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING
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SEAT CAPACITY FORECAST (CY)



ICN - GUM	FLIGHT NO.	CAPACITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOREAN AIR	KE111	269	0	0	0	0	0	0	0	0	0	8,339	8,070	8,339	24,748
KOREAN AIR	KE113	259	4,968	2,208	2,484	2,152	4,573	4,842	8,339	8,339	8,070	8,339	8,070	8,339	70,723
JEJU AIR	7C3102	189	378	0	0	0	1,701	3,402	5,859	5,859	5,670	5,859	5,670	5,859	40,257
JIN AIR	LJ641/771	189	1,134	756	945	2,646	3,402	5,670	5,859	5,859	5,670	5,859	5,670	5,859	49,329
T'WAY	TW301	189	0	0	0	567	3,213	5,670	5,859	5,859	5,670	5,859	5,670	5,859	44,226
AIR SEOUL	RS101	195	0	0	0	0	0	0	0	0	0	1,755	1,755	1,755	5,265
AIR SEOUL	RS103	195	0	0	0	0	975	5,850	6,045	6,045	5,850	6,045	5,850	6,045	42,705
ASIANA AIR	OZ607	188	0	0	0	0	0	0	0	0	0	0	0	0	0
ICN - GUM TOTAL			6,480	2,964	3,429	5,365	13,864	25,434	31,961	31,961	30,930	42,055	40,755	42,055	277,253
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	1,512	1,701	1,701	1,512	1,701	5,859	5,670	5,859	25,515
JIN AIR	LJ647	189	0	0	0	945	1,701	1,512	2,457	2,646	2,268	5,859	5,670	5,859	28,917
AIR BUSAN	BX614	220	1,100	0	0	220	1,980	1,760	3,960	3,740	3,740	6,820	6,600	6,820	36,740
PUS - GUM TOTAL			1,100	0	0	1,165	5,193	4,973	8,118	7,898	7,709	18,538	17,940	18,538	91,172
KOR - GUM			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOR - GUM TOTAL			7,580	2,964	3,429	6,530	19,057	30,407	40,079	39,859	38,639	60,593	58,695	60,593	368,425
KOR - GUM ACTUAL ARRIVAL			841	311											1,152
LF %			11%	10%											



CY2022 TOTAL SEAT CAPACITY FORECAST (KOR-GUM): 368,425 SEATS

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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FLIGHT OPERATION



AIRLINE SCHEDULE - APRIL (6,530 SEATS IN TOTAL)

• 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	2,152
Jin Air	LJ641	TUE/WED/FRI/SUN (Apr 15-)	9:10	14:35	2,646
T'way	TW301	WED/SAT (Apr 23-)	18:00	23:40	567
TOTAL					5,365

• Busan - Guam

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Air Busan	BX614	TUE/SAT (Apr 30-)	08:05	13:05	220
Jin Air	LJ773	TUE/SAT (Apr 16-)	08:00	13:00	945
TOTAL					1,165

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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FLIGHT OPERATION



AIRLINE SCHEDULE - MAY (19,057 SEATS IN TOTAL)

• Incheon - Guam

**Airline schedule is flexible, subject to change.*

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	WED/THU/SAT/SUN	9:00	14:20	4,573
Jeju Air	7C3102	THU/SUN (May 1-)	9:00	14:30	1,701
Jin Air	LJ641	TUE/WED/FRI/SUN	9:10	14:35	3,402
T'way	TW301	WED/THU/SAT/SUN	18:00	23:40	3,213
Air Seoul	RS101	WED/SAT (May 14-)	08:15	13:35	975
TOTAL					13,864

• Busan - Guam

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Air Busan	BX614	TUE/SAT	08:05	13:05	1,980
Jin Air	LJ773	TUE/SAT	08:00	13:00	1,701
Jeju Air	7C3154	THU/SUN	09:30	15:00	1,512
TOTAL					5,193

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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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FLIGHT OPERATION



AIRLINE SCHEDULE - JUNE (30,407 SEATS IN TOTAL)

• Incheon - Guam

**Airline schedule is flexible, subject to change.*

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	WED/THU/SAT/SUN	9:00	14:20	4,842
Jeju Air	7C3102	WED/THU/SAT/SUN	9:00	14:30	3,402
Jin Air	LJ641	DAILY	9:15	14:40	5,670
T'way	TW301	DAILY	18:00	23:40	5,670
Air Seoul	RS103	DAILY	08:15	13:35	5,850
TOTAL					25,434

• Busan - Guam

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Air Busan	BX614	TUE/SAT	08:05	13:05	1,760
Jin Air	LJ773	TUE/SAT	08:00	13:00	1,512
Jeju Air	7C3154	THU/SUN	09:30	15:00	1,701
TOTAL					4,973

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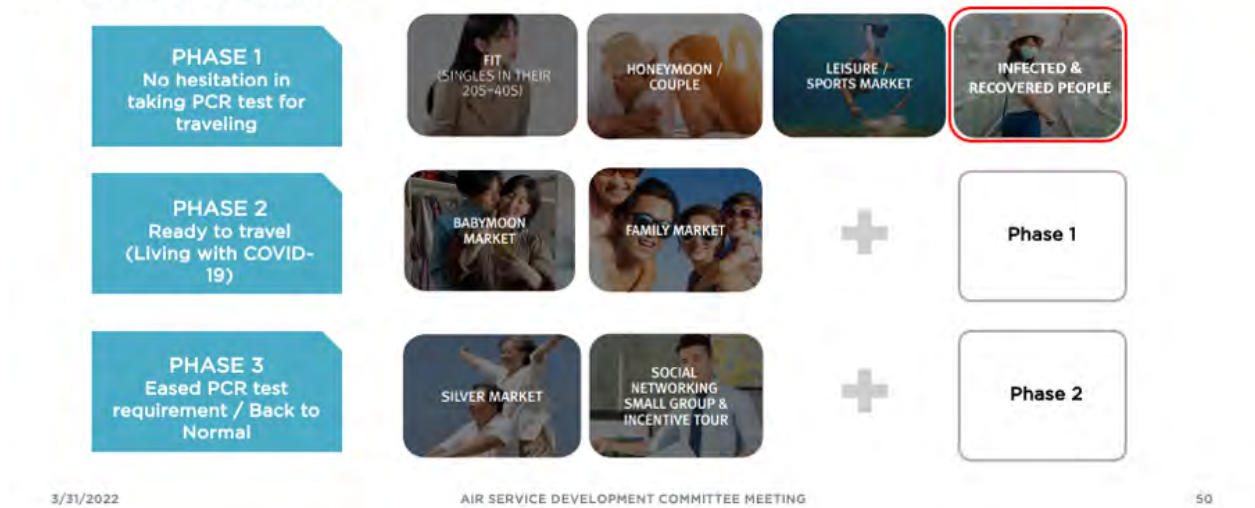
AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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KOREA MARKET OVERVIEW



PRIMARY TARGET MARKET



KOREA MARKET OVERVIEW




KOREA MARKET OVERVIEW




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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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KOREA MARKET OVERVIEW



Key Points for "Guam Again": Tourism Recovery



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AIR SERVICE DEVELOPMENT COMMITTEE MEETING

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- Chairman asked if they are offering free PCR tests at the Korea airport upon arrival? It was clarified that a negative PCR test must be presented at the airport upon arrival (taken prior to departure), then the traveler must take a PCR test within 24 hours of arrival and an antigen test on day 6 or 7 which is covered by the Korean government. He further asked if the PCR test for travel abroad from Korea is paid by the traveler, which was replied that yes, they must pay (required for entry to Guam).
- Chairman also added that it is only Guam paying for all visitors a free PCR test because some of the Japanese are still not aware of that, especially the FIT (free independent travelers). Chairman asked if we could go back to the Japan market and ask how the information is being shared to people.
- FY2022 Air Service Recovery Incentive Programs presented by Air Service Development Marketing Manager Brian Borja.

RECOVERY INCENTIVES UPDATE

PROGRAM RESTART	<ul style="list-style-type: none"> Notified airline partners GVB has restarted both programs: Charter Flight Incentive Program and Regular Air Service Recovery Incentive Program. Invited airlines to re-apply for support. Notified airline partners support can only be provided for flights in April 2022. Reminded airlines of GVB's continue support of marketing cooperative programs. Focus is re-shifted to supporting marketing programs to help fill the planes. 						
APPLICANTS							
BUDGET	FY2021 Carry Forward \$464,712.00 <small>*BOD approved to re-allocate to Japan marketing</small>	FY2022 New Budget \$1.7 Million <small>*BOD approved pm 2/24/22</small>	FY2022 Estimated Spend <table style="margin: auto; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid black; padding: 2px 10px;">\$1,066,900.00</td> <td style="padding: 2px 10px;">spend</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding: 2px 10px;">\$633,100.00</td> <td style="padding: 2px 10px;">balance</td> </tr> </table> <small>*Subject to change. Remaining balance may be allocated to PCR testing. Pending approval from BOD.</small>	\$1,066,900.00	spend	\$633,100.00	balance
\$1,066,900.00	spend						
\$633,100.00	balance						

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- Brian added that expenditures are subject to changed, depending on successfully completed flights. Although applicants share their flight schedule, some of the flights may be canceled, which means we will spend less.

VI. OLD BUSINESS

- None to report currently

VII. NEW BUSINESS

- On behalf of the Guam Airport, Ms. Rolenda Faasuumalie provided the following report to the committee in her absence (she couldn't attend due to another meeting):

- GIAA will attend the Routes Asia meeting - Vietnam, Da Nang. Scheduled 8-15 airline meetings.
- Mr. Brian added that Routes Asia will unite decision-makers from airlines, airports, destinations, and aviation stakeholders that are invested in the future of Asian air connectivity. People who usually attend are those that decide where, when and why the region's aircraft fly. GVB is working with the airport to see how we can support that mission.
- The Guam airport will eliminate restricted terminal entry.
- Ms. Letitia added that currently if you want to meet everybody on arrival, pre-pandemic, you can go into the terminal and wait there. But since then, the airport has created what they call a cellphone parking lot where you wait in your car and then your guest or family will arrive and call you where you will drive down and pick them up on the curbside. Not sure if they will be changing that protocol slowly.
- The GIAA Board has extended the RAISE incentives for another quarter.
- All DPHSS has since been suspended beginning noon April 1, 2022. The DPHSS stations have been removed in baggage claim. No health declarations are required/or are being vetted anymore.
 - Chairman asked even for international flights. Ms. Regina asked if that information was shared in a press release? Mr. Brian said he will clarify with the Guam airport.
 - Chairman also asked if the health declaration form is still required. Ms. Regina noted the electronic declaration form is still required (Guam Customs). Mr. Brian said he will confirm and get back to the committee.

VIII. ANNOUNCEMENTS

- Next ASD Committee Meeting is scheduled for Tuesday, May 3, 2022 at 3:30pm in GVB's main conference room and via GoToMeeting.



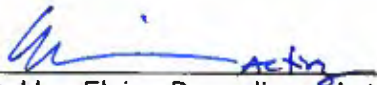
*Event has been extended all through April.

IX. ADJOURNMENT

- Ms. Letitia made a motion to adjourn the meeting. Meeting adjourned at 4:26pm.



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



Minutes approved by: Elaine Pangelinan, Acting Director of Global Marketing