

KOREA MARKETING COMMITTEE MEETING MINUTES

3:30 PM – Tuesday, March 15, 2022

GVB Main Conference Room

Gotomeeting – Virtual Conference Call

Members Present:

1. GVB Chairman – Milton Morinaga
2. KMC Chairman – Ho Eun
3. Fish Eye – Akihiro Tani
4. KGTA – Terry Chung
5. P.I.C. – Young Min Kim
6. Lotte Duty Free – Danny Chen
7. Vantage Advertising – Tae S. Oh
8. Baldyga Group – Tae Oh
9. Dusit Thani – Gun Park
10. I.D.C. – Jennifer McFerran
11. 7-Day Supermarket – Young Sook Hong

Observers:

1. Baldyga Group – Annie Joo
2. Baldyga Group – Mari Oshima
3. Crowne Plaza – Alice Kim
4. GHRA – Mary Rhodes
5. Guam Premier Outlets – Monte Mesa
6. Guam Reef Hotel – Yuki Toshida
7. Hilton Hotel Guam – In Cha
8. Hotel Nikko Guam – Jenny Cheon
9. Hyatt Regency Hotel – Mansoo Hyun
10. Hyatt Regency Hotel – Ki Young Kim
11. Japan Buslines – Shun Matsumoto
12. Jin Air – Hyong Ju Yi
13. Lam Lam Tours – Hiroari Kamimori
14. Leo Palace Guam – Jong In Cheong
15. Nissan Rent-a-car – Michael Tamayo
16. Onward – Miho Causing
17. PDN – Steve Limtiaco
18. PIC – Koji Nagano
19. Sentry Hospitality LLC – Valerie Blas
20. Sheraton Laguna Guam Resort – Nicole Han
21. The Tsubaki Tower – JM Suh
22. The Tsubaki Tower – Hiromi Marsuura
23. Tommy Hilfiger – Jenneth Patricio
24. Tommy Hilfiger – Deanna Crisostomo
25. Tumon Sands Plaza – Emmalou Cabrera
26. University of Guam – Luigi Bansil
27. Westin Resort Guam – Hanna Kim
28. Westin Resort Guam – Nick Song
29. Westin Resort Guam – Yoshihisa Otani

<p><u>Members Absent:</u></p> <ol style="list-style-type: none"> 1. Hana Tour - In Soo Park 2. PIC - Ben Ferguson 	<p><u>GVB Mgmt. /Staff Present:</u></p> <ol style="list-style-type: none"> 1. Vice President - Gerry Perez 2. Director of Global Marketing - Nadine Leon Guerrero 3. Marketing Manager, Korea - Colleen Cabedo 4. Marketing Coordinator, Korea - Margaret Sablan 5. Web & IT Coordinator - AJ Rosario 6. Web & IT Coordinator Assistant - Brian Cha 7. GVB Korea, Country Manager - Jay Park 8. Next Paper, Account Director - Jessica Ham 9. Next Paper, Digital/PR Manager - Bianca Chu 10. Next Paper, President - Mia Soun
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I. CALL TO ORDER

KMC Chairman Mr. Ho Eun called the meeting to order at 3:30p.m.

II. APPROVAL OF MINUTES

Ms. Young Sook Hong made a motion, seconded by Mr. Gun Park to approve the KMC minutes of 02/15/2022. **Motion Approved.**

III. REPORT OF THE CHAIRMAN

- Chairman Eun shared the good news regarding the Korean Government lifting the quarantine requirements for fully vaccinated travelers beginning March 21, 2022. Two PCR tests will still be required. One PCR completed 48hrs before departure and another one 24hrs after arrival. The 3rd PCR test has been changed to an antigen test. He mentioned that this is still an issue and we should keep watch how Korea might modify these requirements.
- Chairman Eun shared that GVB management plans to visit Korea soon. He also mentioned that GVB will continue PCR testing for tourists and said that management will elaborate further regarding updated programs.

IV. REPORT OF MANAGEMENT

- Vice President, Gerry Perez noted that GVB restarted the PCR program at the end of February and asked Director of Global Marketing, Nadine Leon Guerrero to update the group regarding the anticipated support of Public Health.

- Director of Global Marketing, Nadine Leon Guerrero mentioned that GVB has started preliminary discussions with Public Health. They want to offer their support but also note their limitations with staffing. Staff has been working six days a week and up to 12hrs a day. She stated that it will be a challenge for them and their lab capabilities to keep up with what the demand of tourism will be. As of now, we know that they can process up to 400 tests per day.
- Ms. Leon Guerrero, reiterated that the clinics that we have been working with have been able to keep up with the demand since the start of the program and moving forward, we foresee a hybrid program between utilizing the clinics and Public Health. GVB is setting up other meetings with GRMC, DLS and the clinics to help come up with solutions.
- Ms. Leon Guerrero stated that Public Health has graciously offered to train people to take samples, but again due to the limitations of their lab, we would still need to work in conjunction with the private industry. She mentioned that we would have an update by the next board meeting.
- Chairman Eun mentioned that he forwarded an email regarding LAMP testing. It is equivalent to the PCR and widely accepted in Korea and Japan. Results can be as quick as 15 mins and up to 40 mins for negative results. The cost is around \$40. He asked if GVB would be interested in contacting them and Ms. Leon Guerrero gave an affirmation. The initial set up price is minimal and as long as tests are certified by a clinic, the Korean and Japan Government will not have an issue.
- Chairman Eun asked based on our current situation and funding how long will funding last? Ms. Leon Guerrero stated that with Public Health's support we will extend the program. Governor Lou Leon Guerrero has already stated her support and we've announced publicly that the program will extend till the end of the fiscal year.
- Chairman Eun asked if tourists have the option to go to the private clinics or can only utilize Public Health? Ms. Leon Guerrero stated that at this point, as we are still working out the logistics, all testing will still be done through the clinics. Eventually it will become a hybrid program.
- Korea Marketing Manager, Ms. Colleen Cabedo presented on the visitor arrivals for the calendar and fiscal year to date.
- South Korea Country Manager, Mr. Jay Park presented on Market News, Airline Industry Intelligence and Destination Comparison.
- Next Paper President, Ms. Mia Soun presented on upcoming Market Trends for Q3 & Q4, consumer travel sentiments and the upcoming marketing plans.

KOREA MARKETING COMMITTEE MEETING

MARCH 15, 2022

AGENDA

- I. **Call to order**
- II. **Approval of Minutes**
 - February 15, 2022
- III. **Report of the Committee Chairman**
- IV. **Report of Management**
 - Guam Arrivals Update

February 2022



February 1-28, 2022

Total: 5,429 (+143.9%)

% Market Mix	Origin	2020	2021	2022	% to LY
5.7%	Korea	40,024	76	311	309.2%
3.2%	Japan	60,928	60	176	193.3%
0.1%	Taiwan	1,438	9	8	-11.1%
0.3%	China	164	4	15	275.0%
69.0%	US/Hawaii	8,354	1,570	3,746	138.6%
5.5%	Philippines	1,016	125	298	138.4%
0.11%	Hong Kong	150	1	6	500.0%

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

Note: February 2022 Daily Arrivals reflect Civilian Air arrivals only

Calendar Year to Date 2022



January - February 28, 2022

Total: 14,489 (+114.6%)

% Market Mix	Origin	2020	2021	2022	% to LY
8.5%	Korea	118,633	180	1,235	586.1%
9.0%	Japan	122,016	768	1,301	69.4%
0.2%	Taiwan	3,982	18	29	61.1%
0.2%	China	1,982	15	32	113.3%
61.0%	US/Hawaii	15,657	4,545	8,842	94.5%
4.0%	Philippines	1,943	314	575	83.1%
0.06%	Hong Kong	441	2	9	350.0%

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

Note: February 2022 Daily Arrivals reflect Civilian Air arrivals only

Fiscal Year to Date 2022



October 2021 - February 28, 2022

Total: 39,284 (+185.4%)

% Market Mix	Origin	2020	2021	2022	% to LY
18.7%	Korea	319,767	337	7,331	2075.4%
6.3%	Japan	303,733	1,235	2,482	101.0%
0.3%	Taiwan	10,147	86	111	29.1%
0.2%	China	4,261	28	93	232.1%
56.3%	US/Hawaii	37,266	9,399	22,123	135.4%
4.0%	Philippines	8,405	691	1,577	128.2%
0.0%	Hong Kong	1,190	12	17	41.7%

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

Note: February 2022 Daily Arrivals reflect Civilian Air arrivals only

AGENDA

V. Market Updates

Presented by Mr. Jay Park, South Korea Country Manager

- Market News
 - COVID-19 Situation
 - Quarantine Protocol
- Airline Industry Intelligence
 - Korea - Guam Airline Schedule Update
 - FY/CY2022 Airline Operation Plan
- Destination Comparison
- Market Trends
 - Target Market (Flow) / Strategy Overview for Q3/Q4
 - Consumer Travel Sentiment
 - Upcoming Marketing Plan

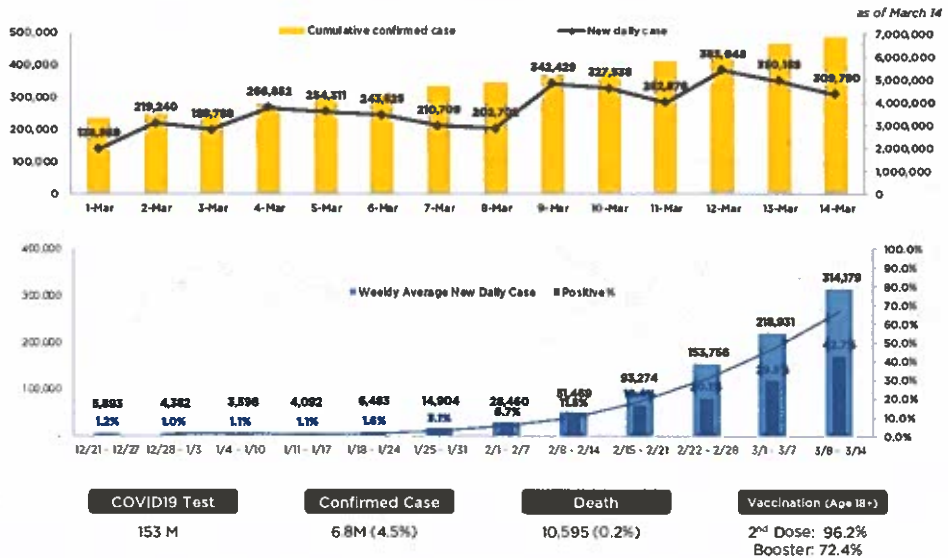


MARKET NEWS



KOREA COVID-19 STATUS

Source: Central Disaster and Safety Countermeasures Headquarters



MARKET NEWS 

COVID-19 SPECIFIC ISSUES

***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*

Reduced PCR tests	Quarantine Exemption	Convenient Entry Protocol
<ul style="list-style-type: none"> • PCR tests will only be required on the first day of arrival • On the seventh day of arrival, people will be asked to take a rapid antigen test instead 	<ul style="list-style-type: none"> • Fully vaccinated travelers in Korea or those who have registered vaccination history after vaccinated in overseas will be exempted from quarantine from Mar.21 • Fully vaccinated travelers in overseas but not registered vaccination history will be also exempted from quarantine from Apr. 1 	<ul style="list-style-type: none"> • Pre-entry reporting system: Individuals submit their vaccination history before arrival via Q code system for fast process https://covid19test.kdca.go.kr/coovisitor https://www.visitkorea.or.kr/eng/visit/visitmain.do?m=0201 • Suspension of quarantine transportation system: All arrivals are allowed to use public transportation from April 1st

MARKET NEWS 

QUARANTINE PROTOCOL: TRAVEL BETWEEN KOREA-GUAM

March 21, 2022-

 **If I am Vaccinated in Korea (Nationals, Foreigners) or registered on COOV**
**Fully vaccinated: Administered WHO approved Vaccines / 14-180 days passed from 2nd shot administration OR Administered booster shot*



MARKET NEWS



QUARANTINE PROTOCOL: TRAVEL BETWEEN KOREA-GUAM

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 \(kdca.go.kr\)](https://www.kdca.go.kr/q-code)



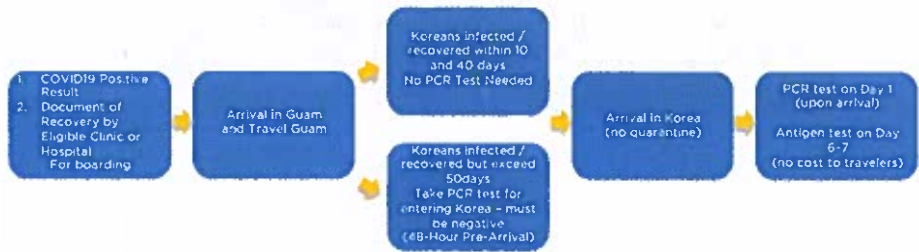
MARKET NEWS



QUARANTINE PROTOCOL: TRAVEL BETWEEN KOREA-GUAM

March 21, 2022-

 **If I am previously confirmed positive result with COVID-19 and recovered**
If I am Vaccinated In Korea (Nationals, Foreigners) or registered on COOV



MARKET NEWS



COVID-19 SPECIFIC ISSUES (HIGHLIGHT)

01



- The government decided to halt the vaccine pass system from March
- Starting March 1, people who have been in close contact with a COVID-19 patient will no longer need to quarantine regardless of their vaccination status.

02



Health authorities eased Korea's social distancing rules by pushing back the business hours restrictions to stay open until 11 p.m. while keeping the six-person cap on private gatherings.

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.

MARKET NEWS



NEW PRESIDENT OF S. KOREA

Yoon Suk-Yeol Elected S. Korea president



- Yoon Suk Yeol elected in the closest race in country's democratic history. With more than 98 percent of the ballots counted, Yoon had 48.6 percent against Lee Jae-myung's 47.8 percent.
- Yoon's election indicated a strong aspiration among his supporters for the transfer of power from the liberal Moon Jae-in government to the conservative bloc.
- He will rebuild the South Korea-U.S. alliance and strengthen the comprehensive strategic alliance between Seoul and Washington, vowing to actively push for the economic security diplomacy.

MARKET NEWS



RUSSIA - UKRAINE WAR

Russia's war in Ukraine will have negative effect on entire global economy









- Russia's war in Ukraine and unprecedented sanctions against Russia have already provoked a **reduction in world trade and a rise in prices for energy and products**, which will inevitably have a **negative impact on the prospects of the global economy**. Seen the **highest oil prices since the 2008 financial crisis**.
- **Russia and Ukraine have both signaled progress in cease-fire talks** despite the ongoing violence. However, Ukraine has said not to surrender or accept any ultimatums.









AIRLINE & INDUSTRY INTELLIGENCE 

KOREA TRAVEL INDUSTRY UPDATE: AIRLINE UPDATES

	 KOREAN AIR	 JIN AIR	 T'way
FY2022 KOR-GUM Seat Supply & Market Share (%)	 31.7% Korean Air 63,452	 22.7% Jin Air 45,549	 15.4% T'way 30,964
FY2022 Operation plan (KOR-GUM)	[ICN-GUM] March - April: 2x weekly May: 4x weekly June - September: Daily	[ICN-GUM] March: weekly, Apr: 2x weekly May - June: 4x weekly July - September: Daily [PUS-GUM] April 16 th - June: 2x weekly July - September: 3x weekly	[ICN-GUM] April: 2x weekly May: 4x weekly June - September: Daily
Other Destination Sales	New York	Japan	Domestic
Issues	<ul style="list-style-type: none"> Conditional approval of Korean Air-Asiana merger, six other major countries are still reviewing the deal Pursue two-track strategy for the "passenger" business and "freight" business in the wake of post-corona 	<ul style="list-style-type: none"> Progress of Guam promotion following the quarantine release period Planning to operate PUS-GUM route from Apr.16 Issue of integration between LCC subsidiaries due to KE-OZ merger 	<ul style="list-style-type: none"> Planning to deploy mid- to long-distance routes such as Singapore, Sydney, Hawaii by introducing new A330-300 Considering cargo business

AIRLINE & INDUSTRY INTELLIGENCE 

KOREA TRAVEL INDUSTRY UPDATE: AIRLINE UPDATES

	 JEJUair	 AIR BUSAN	 AIR SEOUL
FY2022 KOR-GUM Seat Supply & Market Share (%)	 14.2% Jeju Air 28,339	 9.2% Air Busan 17,400	 6.7% Air Seoul 13,435
FY2022 Operation plan (KOR-GUM)	[ICN-GUM] May 5 th - June: 2x weekly July - September: Daily [PUS-GUM] June - September: 2x weekly	[PUS-GUM] April 30 th - June: 2x weekly July - September: 4x weekly	[ICN-GUM] May 4 th - June: 2x weekly July - September: 4x weekly
Other Destination Sales	Saipan	Saipan, Vladivostok	Saipan, Domestic
Issues	<ul style="list-style-type: none"> Aggressive marketing for Guam early bird promotion and consumer event Operation of Saipan route (2x weekly from Busan from Mar.30) Planning to revitalize international flights at local airports such as Busan and Muan 	<ul style="list-style-type: none"> Planning to expand Saipan route (2x weekly from Mar.16) No-landing overseas flight operation Active promotions for overseas travel with duty-free business 	<ul style="list-style-type: none"> Preparing for the operation of Saipan route (2x weekly from Mar.30) Various marketing promotions with consumer brand collaboration

AIRLINE & INDUSTRY INTELLIGENCE



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
Jin Air	LJ641	TUE/FRI	9:15	14:40	945
TOTAL					3,429

Jin Air : canceled March 1, 8, 15, 22



TOTAL OUTBOUND SEAT CAPACITY (MARCH): 3,429 SEATS

AIRLINE & INDUSTRY INTELLIGENCE



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	THU/SUN	9:00	14:20	2,208
Jin Air	LJ641	TUE/FRI	9:40	15:05	1,701
T'way	TW301	WED/SAT (Apr 8 th -)	18:00	23:40	1,512
TOTAL					5,421

• 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



TOTAL OUTBOUND SEAT CAPACITY (APRIL): 6,586 SEATS

AIRLINE & INDUSTRY INTELLIGENCE



AIRLINE SCHEDULE - MAY

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	4,692
Jeju Air	7C3102	THU/SUN (May 5 th -)	9:00	14:30	1,512
Jin Air	LJ641	TUE/WED/FRI/SUN	9:35	14:50	3,402
T'way	TW301	WED/THU/SAT/SUN	18:00	23:40	3,213
Air Seoul	RS101	WED/SAT (May 4 th -)	20:45	02:15(+1)	1,560
TOTAL					14,379

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
TOTAL					3,681



TOTAL OUTBOUND SEAT CAPACITY (MAY): 18,060 SEATS

AIRLINE & INDUSTRY INTELLIGENCE



FY2022 AIRLINE OPERATION PLAN

**Airline schedule is flexible, subject to change. As of March 11*

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	2,208	4,692	8,280	8,156	8,556	8,280	52,581
JEJU AIR	7C3102	189	0	378	756	378	0	0	0	1,512	1,701	5,859	5,859	5,670	22,113
JIN AIR	LJ641/771	189	1,512	1,890	1,890	1,134	756	945	1,701	3,402	3,213	5,859	5,859	5,670	33,831
T'WAY	TW301	189	945	1,480	756	0	0	0	1,512	3,213	5,670	5,859	5,859	5,670	30,964
AIR SEUL	RS101	195	0	0	0	0	0	0	0	1,560	1,715	3,510	3,315	3,315	13,455
AIR SEUL	RS103	195	0	0	0	0	0	0	0	0	0	0	0	0	0
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	5,421	14,379	20,619	29,643	29,448	28,605	163,815

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	945	1,701	1,701	2,457	2,646	2,268	11,718
AIR BUSAN	BX614	220	0	0	880	1,100	0	0	220	1,980	1,980	3,960	3,740	3,740	17,600
PUS - GUM TOTAL			0	0	880	1,100	0	0	1,165	3,681	5,193	8,116	7,898	7,709	35,744

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	3,429	6,586	18,060	25,812	37,761	37,346	36,314	199,559
KOR - GUM ACTUAL ARRIVAL	995	3,652	1,421	841	311								7,220
LF %	15%	44%	16%	11%	10%								



FY2022 TOTAL SEAT CAPACITY (KOR-GUM): 199,559 SEATS

AIRLINE & INDUSTRY INTELLIGENCE



CY2022 AIRLINE OPERATION PLAN

**Airline schedule is flexible, subject to change. As of March 11*

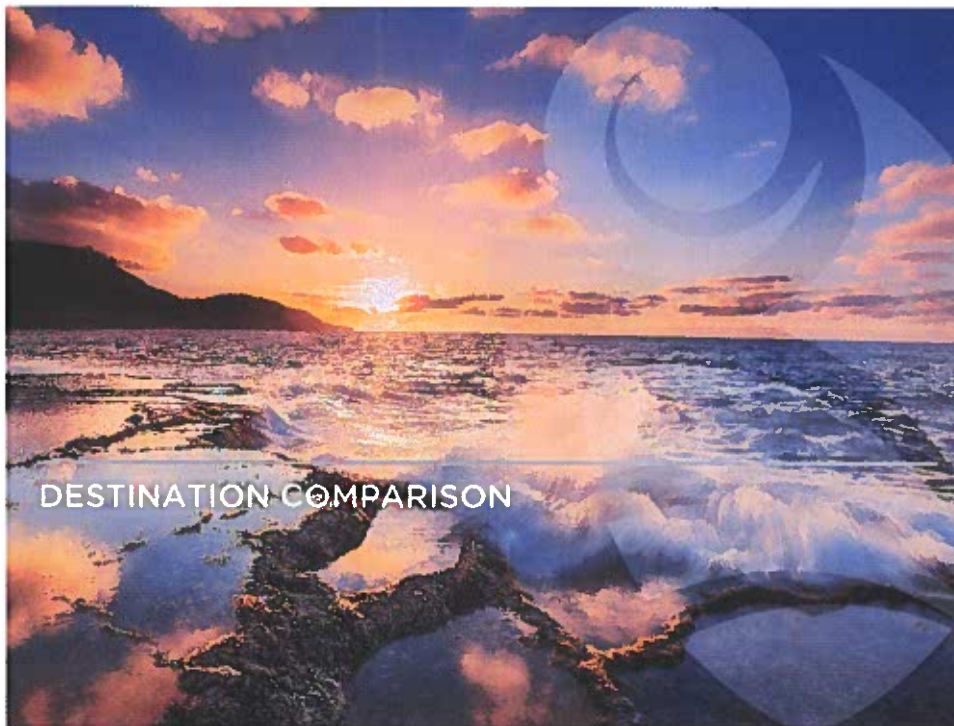
ICN - GUM	FLIGHT NO	CAPACITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOREAN AIR	KE111	276	0	0	0	0	0	0	0	0	0	8,556	8,280	8,556	25,392
KOREAN AIR	KE113	276	4,968	2,208	2,484	2,208	4,692	8,280	8,556	8,556	8,280	8,556	8,280	8,556	75,624
JEJU AIR	7C3102	189	378	0	0	0	1,512	1,701	5,859	5,859	5,670	5,859	5,670	5,859	38,367
JIN AIR	LJ641/771	189	1,134	756	945	1,701	3,402	3,213	5,859	5,859	5,670	5,859	5,670	5,859	45,927
T'WAY	TW301	189	0	0	0	1,512	3,213	5,670	5,859	5,859	5,670	5,859	5,670	5,859	45,171
AIR SEOUL	RS101	195	0	0	0	0	1,560	1,755	3,510	3,315	3,315	3,510	5,850	6,045	28,860
AIR SEOUL	RS103	195	0	0	0	0	0	0	0	0	0	0	0	0	0
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	5,421	14,379	20,619	29,643	29,448	28,605	38,199	39,420	40,734	339,341

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	3,213	3,213	14,553
JIN AIR	LJ647	189	0	0	0	945	1,701	1,701	2,457	2,646	2,268	2,457	3,213	2,457	19,845
AIR BUSAN	BX614	220	1,100	0	0	220	1,980	1,980	3,960	3,740	3,740	3,960	3,740	3,740	28,160
PUS - GUM TOTAL			1,100	0	0	1,165	3,681	5,193	8,118	7,898	7,709	8,118	10,166	9,410	62,558

KOR - GUM	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
KOR - GUM TOTAL	7,580	2,964	3,429	6,586	18,060	25,812	37,761	37,346	36,314	46,317	49,586	50,144	321,899
KOR - GUM ACTUAL ARRIVAL	841	311											1,152
LF %	11%	10%											



CY2022 TOTAL SEAT CAPACITY (KOR-GUM): 321,899 SEATS

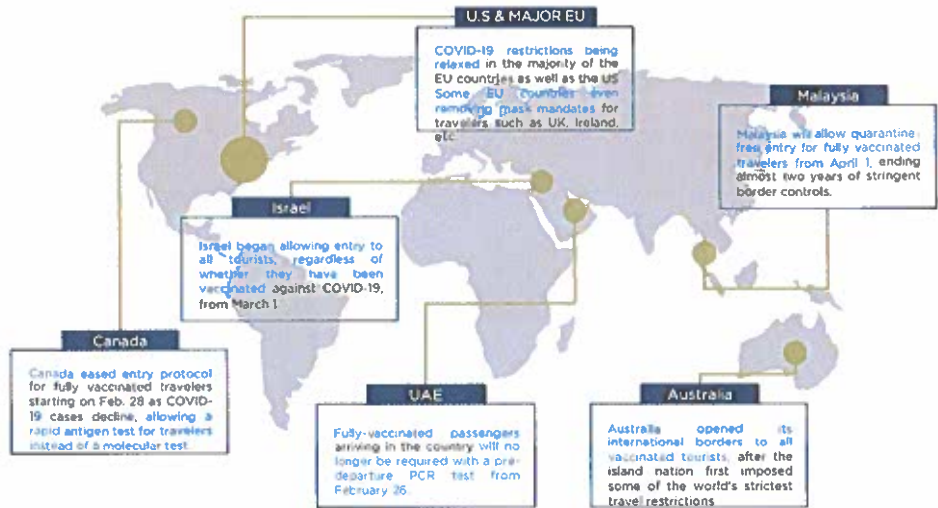


DESTINATION COMPARISON

DESTINATION COMPARISON



GLOBAL TOURISM TREND: NON-DIRECT COMPETITOR UPDATE



DESTINATION COMPARISON



GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



Saipan: Specific Issue

- Mariana Visitors Authority (MVA) is planning to continue its PCR test support until May.
- MVA will progress the airline incentive program, providing \$20,000 per flights that achieves more than 76% of the total load factor.
- COVID testing upon returning Korea:**
 - PCR test within 48 hours prior to departure to Korea (less than 7N)
 - 5th day of on-site arrival, PCR test within 48 hours prior to departure to Korea (more than 8N)



Airline Operation Status

	AIRLINES	FREQUENCY	PERIOD
ICN-SPN	OZ	2/W	Mar 1-
	7C	2/W	Apr 2-
	TW	2/W	Mar 1-
	RS	2/W	Mar 30-
PUS-SPN	BS	2/W	Mar 13 -
	7C	2/W	Mar 30 -

DESTINATION COMPARISON



GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



Hawaii: Specific Issue

- Hawaii became the last state to drop the mask mandate, which will be effective starting from March 26
- Also, from March 26, U.S. domestic travelers to Hawaii will no longer need to show proof of vaccination or a negative COVID-19 test to bypass quarantine



Airline Operation Status

	AIRLINES	FREQUENCY	PERIOD
ICN-HNL	KE	3/W	Mar -
	OZ	3/W	Apr -

- Booking rates: 34% / Most of visitors are travelers
- Asiana Airline is planning to reoperate its Hawaii route from April (3/w) and will increase the flights from July (daily)

DESTINATION COMPARISON



GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



Thailand: Specific Issue

- Thailand reduced the minimum insurance coverage from \$50,000 to \$20,000 for entrants
- Travelers must take RT-PCR test within 3 days before departure and another PCR test upon arrival. Must stay within the hotel until the result comes out. Also, self-administered rapid antigen test are required on the fifth day of arrival



Airline Operation Status

	AIRLINES	FREQUENCY	PERIOD
ICN-BKK	KE	7/W	Mar -
	OZ	7/W	

- Booking rates (Bangkok): 30% / Most of visitors are travelers

DESTINATION COMPARISON



GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



Philippines : Specific Issue

- Philippine's Department of Tourism saw a sustained recovery just barely two weeks after the country opened its borders for leisure foreign travelers
- A total of 26,306 or 55 percent of foreign visitors traveled to Philippines, which the arrivals were mainly from the top markets before the pandemic hit
- Travelers must take RT-PCR test within 2 days before departure

Airline Operation Status

	AIRLINES	FREQUENCY	PERIOD
ICN-MNL	KE	7/W	Jan 2021-
	OZ	4/W	
	7C	1/W	July 2021-

	AIRLINES	FREQUENCY	PERIOD
ICN-CEB	7C/LJ	1/W	Feb 2021-

	AIRLINES	FREQUENCY	PERIOD
ICN-CRK	7C	1/W	Feb 2021-

- Most of visitors are residents and businessmen



MARKET TRENDS



TARGET MARKET (FLOW)



MARKET TRENDS



TARGET MARKET (FLOW)



MARKET TRENDS 

STRATEGY OVERVIEW FOR FY2022 Q3 & Q4

MAR - APR
Warming Up & Market Test Period

- Korean government COVID19 related policy, quarantine protocol still unstable
- Monitoring competitors activities and communicating with trade partners

OBJECTIVE: Maximize awareness of Guam travel is given with our USPs

MARKET TRENDS 

STRATEGY OVERVIEW FOR FY2022 Q3 & Q4

MAR - APR
Warming Up & Market Test Period

- Korean government COVID19 related policy, quarantine protocol still unstable
- Monitoring competitors activities and communicating with trade partners

OBJECTIVE: Maximize awareness of Guam travel is given with our USPs

MAY - JUN
Recovery Period

- Expect easier quarantine protocol for oversea travel
- Airlines will expand / increase international flights
- Focus on support trade partners

OBJECTIVE: Increase the number of direct flights from Korea to Guam

MARKET TRENDS



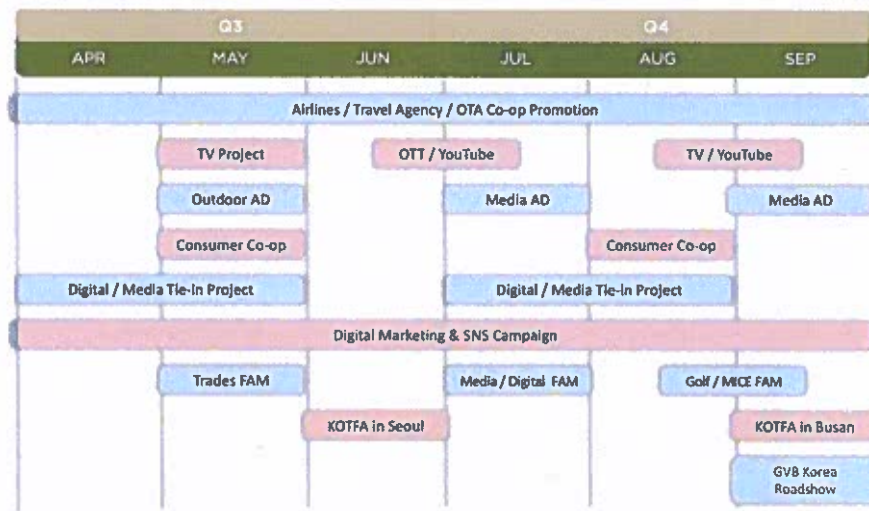
STRATEGY OVERVIEW FOR FY2022 Q3 & Q4



MARKET TRENDS



TACTICAL PLAN OVERVIEW FOR FY2022 3Q & 4Q



MARKET TRENDS



FY2022 Q3 MARKETING PLAN OVERVIEW

- 01 TRAVEL TRADE CO-OP**
Airline & TA co-op promotion
- 02 OTA CO-OP PROMOTION**
HotelsCombined, Kayak, Skyscanner Co-op
- 03 MEDIA TIE-IN & INFLUENCERS CO-OP**
Co-op with AB ROAD / Jeju Air Inflight Magazine & Digital Influencers
- 04 INFLUENCERS CO-OP**
Contents Pitch
- 05 OOH ADVERTISEMENT**
Hongdae/Sungnyemun Bus Shelter Ads
- 06 CONSUMER BRAND COLLABORATION**
Guam Exhibition at Lotte DFS



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - TRAVEL TRADE SHOW RECAP

Befe Baby Fair

- **Period:** March 3 - 6, 2022 (4 days)
- **Venue:** COEX A Hall (1F), Seoul, Korea
- **Host:** BeFe
- **Participants:** 180 domestic & international companies, 600 booths
- **No. of Visitors:** approx. 28,200pax
- **GYB Booth:** Four (4) Independent booth spaces
- **Co-exhibitors:** PIC, Hotel Nikko Guam, Hilton Guam, Sheraton Laguna Guam, The Tsubaki Tower, Icima Corporation

- **Target Market:** Newly married couple, Babymooners, Honeymooners, FITs, General / potential consumers, Travel trade partners
- **Objectives:**
 - ✓ To position Guam as the best destination for babymoon market during the pandemic
 - ✓ To encourage safe travel to Guam through diverse online and mobile promotion channels linked to the baby fair.
 - ✓ To explore how to activate babymoon market in Guam by maintaining continuous business relationships with participating companies.
 - ✓ To develop Guam's shopping market through babymoon consumers.
 - ✓ To promote Guam's various local shopping centers and exclusive shopping opportunities for mom and babies



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - TRAVEL TRADE SHOW RECAP

- **GVB Survey Participants:** approx. 300pax (Details to be provided in further Trip Report)
- **Comments / Feedback**
 - ✓ Many visitors were highly interested in GVB booth as GVB was the only travel-related market.
 - ✓ There were many inquiries about the entry protocol as well as the current travel situation.
 - ✓ Couples and babymooners were interested in traveling Guam for shopping.
 - ✓ Most of the visitors, especially couple units, were eager to participate in survey events showing their willingness to travel as soon as the quarantine is lifted.
 - ✓ Icima's Noni products attracted a lot of pregnant women and families with baby.
 - ✓ Co-exhibitors were satisfied with our participation beyond tourism related fairs for market diversification.
 - ✓ Co-exhibitors are willing to participate the next baby fair as GVB co-exhibitors.



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - TRAVEL TRADE SHOW RECAP

International Education & Career Korea

- **Period:** March 5 - 6, 2022 (2 days)
 - **Venue:** COEX C Hall (3F), Seoul, Korea
 - **Host:** Korea Trade Fairs LTD
 - **No. of booth:** 140 booth (overseas study association, Embassy, DMOs, etc.)
 - **No of Visitors:** approx. 6,880
 - **GVB Booth:** Two (2) independent booth spaces
 - **Co-exhibitors:** University of Guam, Koko Guam kids
- **Target Market:** Parents & Students interested in studying abroad, Educators & Education organizations, General consumers
 - **Objectives:**
 - ✓ To diversify Korea market and develop educational tourism to Guam
 - ✓ To share current status of education market in Guam through local partners
 - ✓ To position Guam as a suitable destination for English education for students
 - ✓ To advertise studying opportunities in Guam to visitors to the event
 - ✓ To promote Guam's various educational programs and environment to trade partners and educational organizations



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - TRAVEL TRADE SHOW RECAP

- **Survey Participants:** approx. 70 pax
- **Comments / Feedback**
 - ✓ GVB booth attracted a lot of population as the booth was located right in front of the entrance.
 - ✓ There were many inquiries about early study abroad procedure for children and people deeply inquired about Koko Guam Kid's study program in Guam.
 - ✓ Many people were interested in Guam study abroad because Guam is a U.S territory and takes only 4 hours from Korea.
 - ✓ University of Guam and Guam Koko kids are willing to participate the next education fair as GVB co-exhibitors.



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - SNS / ONLINE MONITORING



MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - SNS / ONLINE MONITORING

• SNS Comments

Many SNS users strongly express their desire to travel overseas!



Facebook Comment: "Can I travel without any inconvenience finally? Excited to enjoy quarantine exemption policy!"

Naver Comment 1: "Wow! This is the very good news I have been longing for!"

Naver Comment 2: "Finally! Quarantine exemption measure is announced which everyone just waited!"

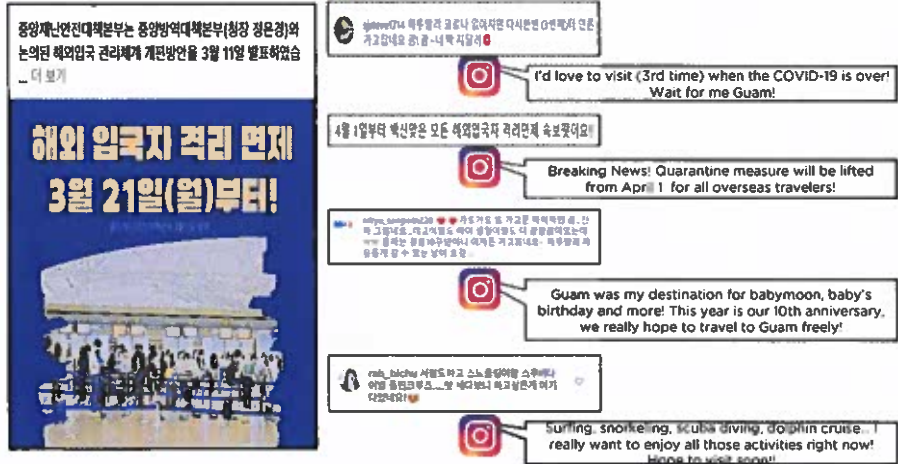
MARKET TRENDS



CONSUMER TRAVEL SENTIMENT - SNS / ONLINE MONITORING

• SNS Comments

Many SNS users strongly express their desire to visit GUAM!



Instagram Comment 1: "I'd love to visit (3rd time) when the COVID-19 is over! Wait for me Guam!"

Instagram Comment 2: "Breaking News! Quarantine measure will be lifted from April 1 for all overseas travelers!"

Instagram Comment 3: "Guam was my destination for babymoon, baby's birthday and more! This year is our 10th anniversary, we really hope to travel to Guam freely!"

Instagram Comment 4: "Surfing, snorkeling, scuba diving, dolphin cruise... I really want to enjoy all those activities right now! Hope to visit soon!"

MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

Airline Co-op Promotion

- **Period:** February- 2022
- **Airline:** Korean Air, Jeju Air, Jin Air, T'way, Air Seoul, Air Busan
- **Target:** General consumer, airline consumers
- **Scheme:**
 - Airlines to open [special promotion page](#) on their website.
 - Provide discount for Guam air ticket for [early bird promo](#).
 - Conduct [SNS event](#) to provide prizes and maximize exposure.
 - Place on/offline [advertisement](#).
 - Expose Guam logo on the promotion page.



TA Co-op Promotion

- **Period:** March- 2022
- **TAs (TBD):** Hana, Mode, Lotte, Interpark, Lotte, YB, online, etc.
- **Target:** General consumers
- **Scheme:**
 - [Develop special packages](#) for market diversification
 - TAs to conduct [website promotion](#) to increase sales.
 - Provide benefits to consumers who book Guam packages during the promotion period.
 - Conduct [TV home shopping](#), [liver commerce](#), and [social commerce promotion](#), etc.
 - Expose Guam logo on the promotion page.



MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

OTA Co-op Promotion

- **Period:** March - April
- **Channel:** Kayak, HotelsCombined, Skyscanner
- **Target:** FITs, general consumers, potential travelers, OTA users
- **Ad Type:** Homepage takeover, Native inline, after-click, mobile display, display ads, stand banner, newsletter
- **Promotion Plan:**
 - Expose Guam Air Ticket & Hotel promotions in OTA Website & Mobile channels
 - Expose promotion on official Naver blog & Event banner
 - Link the banner to Guam sales page and GVB Korea SNS channels
 - Guam logo & GuamAgain will be exposed throughout the promotion



MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

AB Road Magazine X Digital Influencers Co-op

- **Period:** March - May
- **Media:** AB-Road & JOIN enjoy (Jeju Air in-flight magazine)
- **Influencers:** Park Eun Ha
- **Scheme:**
 - Co-op with digital influencers and have them travel Guam from Mar 31 to Apr 7
 - Experience diverse activities including food, diving, etc. and create contents
 - Post on their blog and SNS channel
 - Also, expose the contents on AB-Road magazine (May issue) as a Guam special edition with cover advertisement



 @elenaehapark
Follower 61,621

 <https://blog.naver.com/news/waha>

Circulation: 50,000

Circulation: 80,000

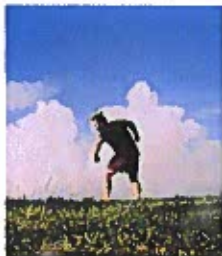
MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

Digital Influencers Content Production

- **Period:** March - May
- **Target:** FITs, general consumers, potential travelers, SNS users, couples/honeymooners, etc.
- **Influencers:** 11 Influencers
- **Categories:** Photography Pitch (March) / Couple (April) / FIT - Millenials Boy&Girls Getaway (May)
- **Scheme:**
 - Co-op with digital influencers to travel to Guam and capture contents from different categories consecutively
 - Experience Guam according to the adequate theme of trip
 - Post and share their experience on their Instagram
 - Submit image/video contents to GVB for marketing and promotional usage



@dal_moo
Videographer/Photographer
36.8K Followers



@haeny_gram
Model/Influencer
89.5K Followers



@saram.travel
Photographer/Influencer
24.1K Followers

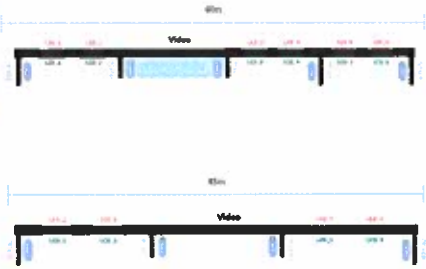
MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

Out-of-Home Advertisement

- **Period:** April
- **Channel:** Outdoor advertisement at Hongdae and Sungnyemun
- **Platform:** Bus Shelter (Video & Signage)
- **Target:** Potential travelers in Hongdae and Sungnyemun area, office workers, people of all ages, FITs (10s-50s), etc.



MARKET TRENDS



UPCOMING MARKETING PLAN (Q2-Q3)

Guam Exhibition at Lotte Department Store HQ

- **Period:** April (tentative)
- **Target:** Lotte Department & Duty Free Membership, FITs, general consumers, potential travelers, etc.
- **Scheme:**
 - Secure Lotte Duty Free Shop lounge venue for Guam exhibition about a month
 - Decorate the spaces and showcase Guam photos and video to target Lotte DFS membership
 - During the exhibition period, invite media and influencers for press conference to promote Guam and maximize exposure






Australia case study

SUMMARY



KEY POINT

<p>01</p>  <p>Quarantine Quarantine Lifted for fully vaccinated travelers</p>	<p>02</p>  <p>Seat Capacity Recover airline seat supply & increase/maximize seat capacity</p>	<p>03</p>  <p>Proactive Marketing Support airlines and travel agencies for promotion and sales Co-op with media, consumer brand, and digital influencers to optimize Guam's brand awareness</p>
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APPENDIX 1.
Q-CODE SYSTEM
QUARANTINE PROTOCOL
(COMPETITORS)

APPENDIX – Q-CODE SYSTEM



QUARANTINE PROTOCOL: Q-CODE SYSTEM INTRODUCTION

Q-code is a system established by the KDCA in order to shorten the time for quarantine inspection and provide the conveniences overseas entrants require upon entry. Anyone who inputs normal quarantine information through Q-code will be able to avail fast and convenient quarantine inspection after their arrival.*

Prior to entry

Access Q-code
(<https://cov19ent.kdca.go.kr>)



- ✓ Prepare passport, airline ticket, PCR negative confirmation (screening done within 48 hours of the time of departure) in advance.

Prior to boarding

Input information on passport, entry/stay in Korea, vaccination, PCR screening and health condition in the order listed

- ✓ All inputs can be saved temporarily and corrected at all input stages.

After arrival

Present QR-Code to quarantine officer

- ✓ All types of QR-Codes, including those printed on paper and captured with electronic device can be used.
- ✓ You can receive quick quarantine services.

Issue a QR code after checking your input.

- ⚠ After issuing the QR code, only the health status could be modified.

APPENDIX - DESTINATION COMPARISON



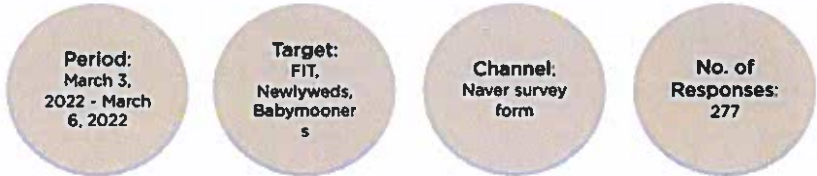
GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE (QUARANTINE PROTOCOL)

	GUAM & HAWAII	CNMI	Thailand	Philippines	Singapore
Pre-departure Testing	Viral test within 1 day before departure *Children aged under 2 exempted		RT-PCR test within 3 days before departure *Children aged under 6 exempted	RT-PCR test within 2 days before departure *Asymptomatic children aged under 3 exempted	Viral test within 2 days before departure *Children aged under 2 exempted
Quarantine Exemption Target	Vaccinated travelers Unvaccinated travelers under 18 (accompanied by vaccinated parents)		Vaccinated travelers Unvaccinated travelers under 18 (accompanied by vaccinated parents)	Vaccinated travelers Unvaccinated travelers aged 12 and below (accompanied by vaccinated parents)	Vaccinated travelers Unvaccinated travelers aged 12 and below (accompanied by vaccinated parents)
Entry Quarantine	No entry quarantine for vaccinated travelers / Unvaccinated travelers under 18 (accompanied by vaccinated parents)		Travelers must stay within the hotel for the RT-PCR test result on Day 1	No entry quarantine for vaccinated travelers / Unvaccinated travelers aged 12 and below (accompanied by vaccinated parents)	No entry quarantine for vaccinated travelers / Unvaccinated travelers aged 12 and below (accompanied by vaccinated parents)
Local COVID-19 Testing	PCR test within 48 hours prior to departure to Korea	PCR test within 48 hours prior to departure to Korea (less than 7N) 5th day of on-site arrival, PCR test within 48 hours prior to departure to Korea (more than 8N)	Self-administered rapid antigen test on the fifth day of arrival PCR test within 48 hours prior to departure to Korea	PCR test within 48 hours prior to departure to Korea	Supervised antigen test at test center within 1 day of arrival PCR test within 48 hours prior to departure to Korea
Quarantine upon arrival in Korea	* No quarantine for fully vaccinated travelers (Mar.21-)				

APPENDIX 2. SURVEY RESULT (BABY FAIR)

SURVEY RESULT

BABY FAIR SURVEY OVERVIEW

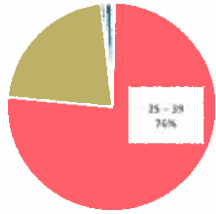


 **Insight**

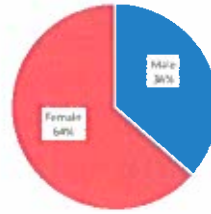
- Majority were eager to travel overseas within next year and when the quarantine is lifted
- While most of the people wanted to stay for around 5 days, the rate for long-term stay preferences were comparatively high, probably due to the pent-up demand for overseas travel.
- As the average age of the respondents were 20-40s, SNS was found out to be the most frequently used channel for reference, demonstrating the importance of digital media.
- More than 30% of the respondents have visited Guam previously, showing high interest in revisiting.

SURVEY RESULT 

BABY FAIR SURVEY RESULT



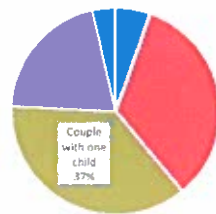
Age	Count	Percentage
18 - 24	1	0.4%
25 - 39	211	76.2%
40 - 49	60	21.7%
50 - 59	2	0.7%
60+	3	1.1%



Sex	Count	Percentage
Male	101	36.5%
Female	176	63.5%

SURVEY RESULT 

BABY FAIR SURVEY RESULT



Household Type	Count	Percentage
Single	15	5.4%
Couple with no children	93	33.6%
Couple with one child	102	36.8%
Couple with two children	57	20.6%
Couple with more than three children	10	3.6%

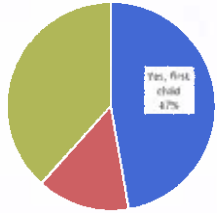


Household Income (year)	Count	Percentage
Less than \$20,000	8	2.9%
\$20,001 - \$30,000	23	8.3%
\$30,001 - \$40,000	47	17%
\$40,001 - \$50,000	32	11.6%
\$50,001 - \$60,000	35	12.6%
\$60,001 - \$70,000	27	9.7%
\$70,001 - \$80,000	24	8.7%
More than \$80,001	63	22.7%
Undisclosed	18	6.5%

SURVEY RESULT

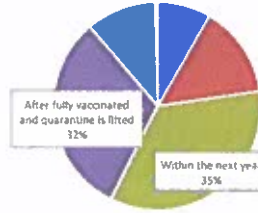


BABY FAIR SURVEY RESULT



Are you or is your significant other an expectant mother?

Yes, first child	131	47.3%
Yes, not the first child	40	14.4%
No	106	38.3%



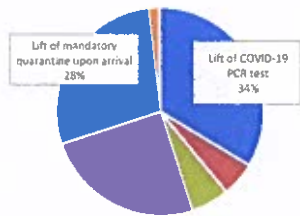
When do you plan to travel overseas?

Within the next 3 months	23	8.3%
Within the next 6 months	40	14.4%
Within the next year	96	34.7%
After fully vaccinated and quarantine is lifted	87	31.4%
Unsure	30	10.8%
Etc.	1	0.4%

SURVEY RESULT



BABY FAIR SURVEY RESULT



What is the top condition for you to be willing to travel abroad?

Lift of COVID-19 PCR test	93	33.6%
Completion of vaccination (2nd dose)	15	5.4%
Completion of vaccination (booster shot or more)	17	6.1%
Lift of mandatory quarantine of the travel destination	69	24.9%
Lift of mandatory quarantine upon arrival	78	28.2%
Etc.	5	1.8%



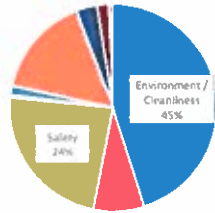
Where do you want to travel abroad for the first time after COVID-19?

Guam	24	86.6%
US	12	4.3%
Europe	19	6.9%
Asia	4	1.4%
Etc.	2	0.7%

SURVEY RESULT



BABY FAIR SURVEY RESULT



When traveling with you or your child, what is the first consideration for you to choose a destination?

Factor	Count	Percentage
Environment / Cleanliness	125	45.1%
Shopping	22	7.9%
Safety	65	23.5%
Price	1	0.4%
Food	4	1.4%
Tourism Infrastructure	44	15.9%
Activity	9	3.2%
Recommendation	5	1.8%
Etc.	2	0.7%



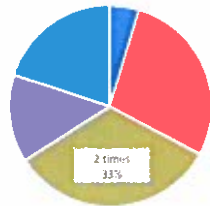
How many days will you travel if you go on an overseas trip after COVID-19?

Duration	Count	Percentage
1-3 days	13	4.7%
4-6 days	167	60.3%
7-14 days	87	31.4%
15-30 days	9	3.2%
More than a month	1	0.4%

SURVEY RESULT

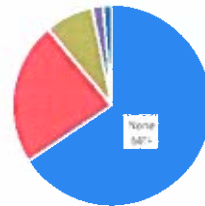


BABY FAIR SURVEY RESULT



How many times a year did you travel abroad before pandemic?

Frequency	Count	Percentage
None	13	4.7%
1 time	78	28.2%
2 times	92	33.2%
3 times	39	14.1%
More than 4 times	55	19.9%



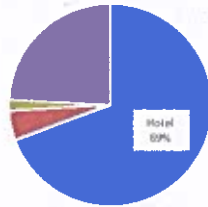
How many times have you visited Guam?

Frequency	Count	Percentage
None	182	65.7%
1 time	64	23.1%
2 times	22	7.9%
3 times	5	1.8%
More than 4 times	4	1.4%

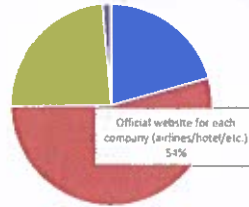
SURVEY RESULT



BABY FAIR SURVEY RESULT



What type of facility are you planning on staying in?		
Hotel	192	69.3%
Guest House/Bed and Breakfast	13	4.7%
Family/Friend house	5	1.8%
Etc.	67	24.2%

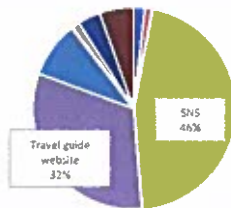


What channel do you use for reservation when you plan traveling?		
Travel agency	57	20.6%
Official website for each company (airlines/hotel/etc.)	150	54.2%
OTA Platform (ex. Trip.com, Expedia)	66	23.8%
Etc.	4	1.4%

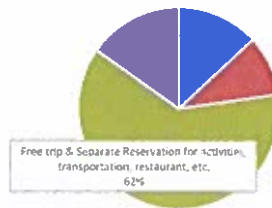
SURVEY RESULT



BABY FAIR SURVEY RESULT



Which source do you rely on the most when planning a trip?		
TV	5	1.8%
Magazine	3	1.1%
SNS	127	45.8%
Travel guide website	88	31.0%
Recommendation	25	9%
Travel agency brochure	4	1.4%
Travel trade show	10	3.6%
Etc.	15	5.4%



Which travel type do you prefer the most?		
Package trip (flight ticket, accommodation, schedule included)	36	13%
Airtel trip (flight ticket, hotel included)	27	9.7%
Free trip & Separate Reservation for activities, transportation, restaurant, etc.	172	62.1%
Free trip	42	15.2%

APPENDIX 3. SURVEY RESULT (EDUCATION FAIR)

SURVEY RESULT

EDUCATION FAIR SURVEY OVERVIEW



 **Summary**

- Around **30%** of the respondents were actively seeking for the study abroad program as many countries are starting "Living with COVID-19" scheme.
- More than **50%** responded that they are going to stay more than a year for study abroad period, **education program being the most important factor** in selecting the study abroad destination.
- It seems like the demand for study abroad in Guam will keep increasing as the top language which respondents would like to learn for their second language was English.

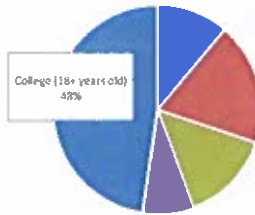
SURVEY RESULT 

EDUCATION FAIR SURVEY RESULT



Age

Parent	22	52.4%
Guardian	7	11.1%
Student (18 years or older)	23	36.5%

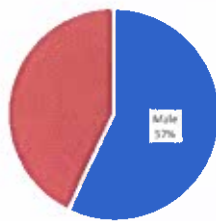


Type of Student

Pre-school (5 and below)	7	11.1%
Elementary (6 - 10 years old)	12	19%
Middle School (11 -13 years old)	9	14.3%
High School (14 - 17 years old)	5	7.9%
College (18+ years old)	30	47.6%

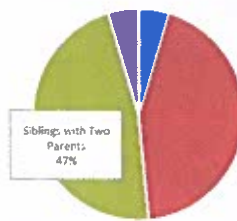
SURVEY RESULT 

EDUCATION FAIR SURVEY RESULT



Sex

Male	36	57.1%
Female	27	42.9%



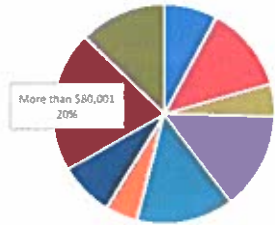
Family Household

Only Child with One Parent	3	4.8%
Only Child with Two Parents	29	46.0%
Siblings with Two Parents	31	49.2%
Etc.	3	4.8%

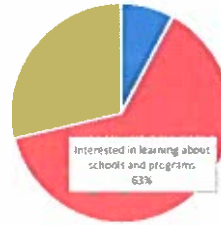
SURVEY RESULT



EDUCATION FAIR SURVEY RESULT



Household Income (year)		
Less than \$20,000	5	7.9%
\$20,001 – \$30,000	8	12.7%
\$30,001 – \$40,000	3	4.6%
\$40,001 – \$50,000	9	14.3%
\$50,001 – \$60,000	9	14.3%
\$60,001 – \$70,000	3	4.8%
\$70,001 – \$80,000	5	7.9%
More than \$80,001	13	20.6%
Undisclosed	8	12.7%

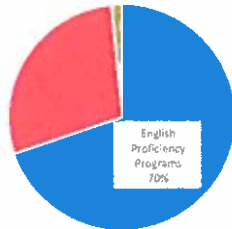


Education Fair Interest Level		
Not interested in learning about schools and programs	5	7.9%
Interested in learning about schools and programs	40	63.5%
Actively seeking	18	28.6%

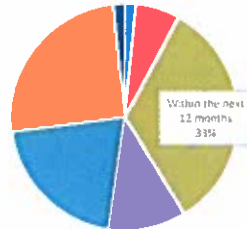
SURVEY RESULT



EDUCATION FAIR SURVEY RESULT



What are you seeking for in the fair?		
English Proficiency Programs	44	69.8%
Internship or Job Placement Programs	18	28.6%
Etc.	1	1.6%

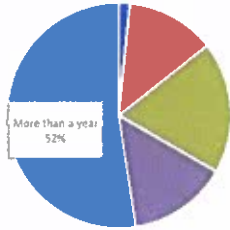


When do you plan to study abroad?		
Within the next 3 months	1	1.6%
Within the next 6 months	4	6.3%
Within the next 12 months	21	33.3%
Within the next year	7	11.1%
After fully vaccinated and quarantine is lifted	13	20.6%
Unsure	16	25.4%
Not interested	1	1.6%

SURVEY RESULT



EDUCATION FAIR SURVEY RESULT



For how long you are going to stay for the study abroad/language school?

Less than 1 month	1	1.6%
Less than 3 months	8	12.7%
Less than 6 months	12	19%
Less than 12 months	9	14.3%
More than a year	33	52.4%



What is the purpose of your study abroad/ language school?

Overseas experience	19	30.2%
Preparation for future employment	13	20.6%
Language study	24	38.1%
Dissatisfaction with domestic education	6	9.5%
Etc.	1	1.6%

SURVEY RESULT

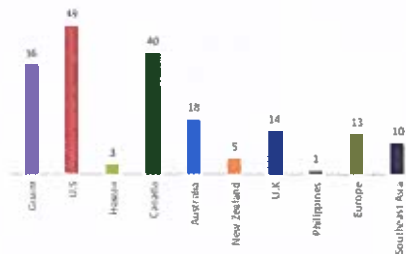


EDUCATION FAIR SURVEY RESULT



If you are traveling for language studies, what language are you most interested in?

English	53	84.1%
Spanish	3	4.8%
Chinese	5	7.9%
French	0	0%
Etc.	2	3.2%



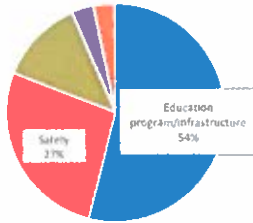
What three destinations are you currently interested in at this fair? (Multiple responses)

Guam	36
U.S.	49
Hawaii	3
Canada	40
Australia	18
New Zealand	5
U.K.	14
Philippines	1
Europe	13
Southeast Asia	10

SURVEY RESULT

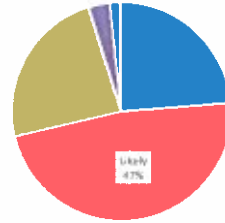


EDUCATION FAIR SURVEY RESULT



What is the most important factor in selecting a study abroad/ language school destination?

Factor	Count	Percentage
Education program/infrastructure	34	54%
Safety	17	27%
Cost	8	12.7%
Climate	2	3.2%
Recommendation	0	0%
Etc.	2	3.2%



How much are you willing to go to Guam for studying abroad/language school?

Willingness	Count	Percentage
Very likely	15	23.8%
Likely	30	47.6%
Neutral	26	23.8%
Unlikely	2	3.2%
Very unlikely	1	1.6%

SURVEY RESULT

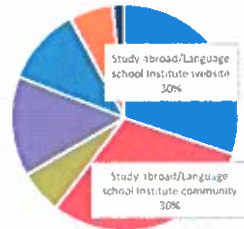


EDUCATION FAIR SURVEY RESULT



If you are willing to choose Guam as a study abroad/ language school destination, what is the reason?

Reason	Count	Percentage
U.S. destination	27	42.9%
English speaking country	28	44.4%
Close distance to Korea	5	7.9%
Safety	0	0%
Easy to navigate around	0	0%
Etc.	3	4.8%



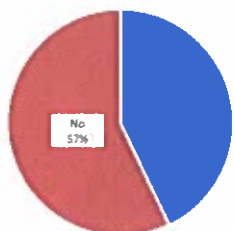
Which source do you rely on the most when preparing for study abroad/language school?

Source	Count	Percentage
Study abroad/Language school Institute website	19	30.2%
Study abroad/Language school Institute community	19	30.2%
Study abroad/Language school Institute brochure	4	6.3%
Study abroad fair	9	14.3%
SNS	7	11.1%
Recommendation	4	6.3%
Etc.	1	1.6%

SURVEY RESULT

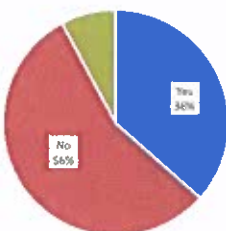


EDUCATION FAIR SURVEY RESULT



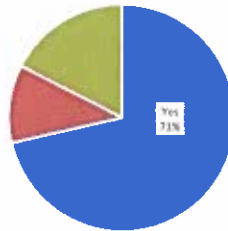
Have you been to Guam?

Yes	27	42.9%
No	36	57.1%



Have you heard of Guam's educational program before this event?

Yes	23	36.5%
No	35	55.6%
Undecided	5	7.9%



After today, are you considering to study in Guam or learn would like to learn more?

Yes	45	71.4%
No	7	11.1%
Undecided	11	17.5%



Q&A:

- Chairman Eun asked if there is Public Health staff at the airport when the travelers arrive? Ms. Leon Guerrero mentioned that it depends on where the flights are originating from. For example, flights from Korea are predominantly foreigners therefore; Public Health has decided that because Korean Air and other carriers are required to ensure that passengers are vaccinated and tested, that they will trust the airlines to handle those requirements. Flights arriving from Narita are different as they are mostly a mix of US citizens and foreigners so those flights are screened. Flights originating from the Philippines are also no longer screened.
- Chairman mentioned that when Korean travelers get an antigen test that the results do not need to be written in English. Ms. Leon Guerrero noted that we have given them samples of what the tests results will look like, and they are using that to decipher.
- Chairman Eun said that Korean carriers are more familiar with Korean characters so it is important to let the travelers know that they don't need to find a clinic that can do the English translation.
- Ms. Young Sook Hong mentioned that she recently returned from Korea and that the test results she received, only her name was in English and all the other information was in Korean and that it was not an issue. She also noted that when she arrived on Guam, that she had approached the table and they informed her that there was no screening for flights arriving from Korea. She also said that she was only charged \$5 for the antigen test in Korea.

V. OLD BUSINESS

VI. NEW BUSINESS

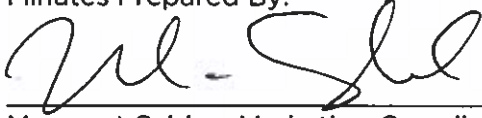
VII. ANNOUNCEMENTS

- Next KMC Meeting, April 19, 2022 (subject to change) at 3:30pm via Gotomeeting.
- Baldyga group will reopen the Ride the Ducks tour and Sunset Cruise this coming April. Currently, the Tao Tao Tasi show is available every Saturday and will increase frequency come April.
- Acknowledgement and thanks to Korea Marketing Manager, Ms. Colleen Cabedo for her 9+ years of service, dedication and hard work to the Guam Visitors Bureau and the tourism industry as a whole.

VIII. ADJOURNMENT

Mr. Terry Chung made a motion, seconded by Mr. Young Min Kim, to adjourn the meeting. Motion Approved. The meeting adjourned at 4:16pm.

Minutes Prepared By:



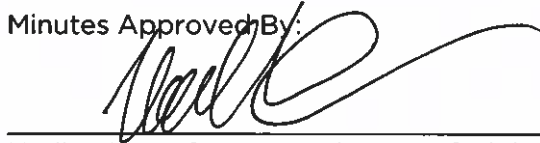
Margaret Sablan, Marketing Coordinator - Korea

Minutes Prepared Reviewed By:



Colleen Cabedo, Marketing Manager - Korea

Minutes Approved By:



Nadine Leon Guerrero, Director of Global Marketing

