

**KOREA MARKETING COMMITTEE (KMC) MEETING MINUTES**

Tuesday, April 19, 2022 at 3:30 p.m.

GVB Main Conference Room and GoToMeeting

[www.gotomeet.me/GUAMVISITORSBUREAU/kmc-meeting](http://www.gotomeet.me/GUAMVISITORSBUREAU/kmc-meeting)

*\*online attendance*

<p><b><u>Members Present:</u></b></p> <ol style="list-style-type: none"> <li>1. KMC Vice Chairman - Ben Ferguson</li> <li>2. 7-Day Supermarket - Young Sook Hong</li> <li>3. Baldyga Group - Tae Oh</li> <li>4. Fish Eye Marine Park - Akihiro Tani</li> <li>5. Lotte Duty Free - Danny Chen</li> <li>6. Korea Guam Travel Association (KGTA) - Terry Chung</li> <li>7. Pacific Islands Club - Young Min Kim</li> </ol>	<p><b><u>Observers:</u></b></p> <ol style="list-style-type: none"> <li>1. Crowne Plaza - Alice Kim*</li> <li>2. Dusit Thani Guam Resort - So Yi Mun*</li> <li>3. Guam Daily Post - Haidee Eugenio Gilbert*</li> <li>4. Guam Premier Outlets - Monte Mesa*</li> <li>5. Guam Premier Outlets - Suzanne Perez*</li> <li>6. Guam Reef Hotel - Yuki Toshida*</li> <li>7. Hilton Guam Resort &amp; Spa - In Cha*</li> <li>8. Hotel Nikko Guam - Jenny Cheon*</li> <li>9. Hyatt Regency Guam - Ki Kim*</li> <li>10. Leoplace Resort Guam - Jong In Cheong*</li> <li>11. Micronesia Mall - Julia Rivera*</li> <li>12. Nissan Rent A Car - James B Valencia*</li> <li>13. Pacific Islands Club - Koji Nagano*</li> <li>14. RIHGA Royal Laguna Guam Resort - Nicole Han*</li> <li>15. Tommy Hilfiger - Deanna Crisostomo*</li> <li>16. Tumon Sands Plaza - Emmalou Cabrera*</li> <li>17. PMT Guam - Shirata Ichiro*</li> <li>18. PMT Guam - Taro Goto*</li> <li>19. PMT Guam - Kamimori Hiroari*</li> <li>20. The Westin Resort Guam - Yoshihisa Otani*</li> <li>21. United Airlines - Atsuta Kazunori*</li> <li>22. Bruce Gaillie*</li> </ol>
<p><b><u>Members Absent</u></b></p> <ol style="list-style-type: none"> <li>1. KMC Chairman - Ho Eun</li> <li>2. Dusit Thani Guam Resort - Gun Park</li> <li>3. International Dining Concepts (IDC) - Jennifer McFerran</li> <li>4. Hana Tour - In Soo Park</li> <li>5. Vantage Advertising - Tae S. Oh</li> </ol>	<p><b><u>GVB Board/Management/Staff Present:</u></b></p> <ol style="list-style-type: none"> <li>1. GVB Chairman - Milton Morinaga</li> <li>2. Director of Global Marketing - Nadine Leon Guerrero</li> <li>3. Marketing Manager, Korea - Margaret Sablan</li> <li>4. Marketing Coordinator, Korea - Nicole Benavente</li> <li>5. GVB Korea, Country Manager - Jay Park</li> <li>6. Marketing Manager, Air Service - Brian Borja</li> <li>7. Next Paper, Account Director - Jessica Ham</li> </ol>

## 1. CALL TO ORDER

KMC Vice Chairman Mr. Ben Ferguson called the meeting to order at 3:30 p.m.

## 2. APPROVAL OF PREVIOUS MINUTES

Mr. Young Min Kim motioned to approve the KMC minutes dated 3/15/22, seconded by Mr. Tae Oh. **Motion Approved.**

## 3. REPORT OF CHAIRMAN

- Vice Chairman Ferguson extended his condolences to KMC Chairman Mr. Ho Eun on the passing of his father, which is why he could not attend today's meeting as he is on his way back to Korea.
- Vice Chairman Ferguson expressed his appreciation to the staff and management at GVB for organizing two recent successful fam tours. He also extended his appreciation to Jin Air, Korean Air, media, and travel agents who participated in these fam tours. He said that these types of events are important to our success, as they show our partners and their customers that we are ready to accept their business. The fam tours concluded with a dinner at GVB President & CEO Carl Gutierrez's house, which he thanked GVB for organizing as well.
- Vice Chairman Ferguson requested a moment of silence to remember GVB Board Vice Chairman Paul Shimizu.

## 4. REPORT OF MANAGEMENT

- Director of Global Marketing Ms. Nadine Leon Guerrero thanked all the members present and in attendance last night. She said that the event showed visiting media from Korea that Guam is ready.
- Ms. Leon Guerrero announced the promotion of Ms. Margaret Sablan to GVB Marketing Manager for Korea. She also announced that Ms. Nicole Benavente transferred from the Taiwan market to be the GVB Marketing Coordinator for Korea.



- Ms. Sablan presented visitor arrivals for March and for the calendar and fiscal year to date.

March 2022					
March 1-31, 2022					
Total: 7,710 (+186.4%)					
% Market Mix	Origin	2020	2021	2022	% to LY
9.9%	Korea	5,159	103	760	637.9%
5.0%	Japan	20,887	66	383	480.3%
0.3%	Taiwan	498	8	20	150.0%
0.2%	China	31	17	13	-23.5%
59.7%	US/Hawaii	3,791	1,845	4,605	149.6%
4.9%	Philippines	652	178	381	114.0%
0.03%	Hong Kong	24	1	2	100.0%

Source: Guam Customs Declaration Forms. Processed by the Guam Visitors Bureau. Note: March 2022 Daily Arrivals reflect Civilian Air arrivals only



# Calendar Year to Date 2022



January - March 31, 2022

Total: 23,772 (+122.3%)

% Market Mix	Origin	2020	2021	2022	% to LY
8.4%	Korea	123,797	284	1,995	602.5%
7.2%	Japan	143,230	1,023	1,719	68.0%
0.2%	Taiwan	4,480	26	49	88.5%
0.2%	China	2,013	32	45	40.6%
62.4%	US/Hawaii	20,732	7,362	14,823	101.3%
4.0%	Philippines	2,596	492	956	94.3%
0.05%	Hong Kong	465	3	11	266.7%

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

Note: March 2022 Daily Arrivals reflect Civilian Air arrivals only

# Fiscal Year to Date 2022



October 2021 - March 31, 2022

Total: 48,567 (+174.3%)

% Market Mix	Origin	2020	2021	2022	% to LY
16.7%	Korea	324,931	441	8,091	1734.7%
6.0%	Japan	324,947	1,490	2,900	94.6%
0.3%	Taiwan	10,645	94	131	39.4%
0.2%	China	4,292	45	106	135.6%
57.9%	US/Hawaii	42,341	12,216	28,104	130.1%
4.0%	Philippines	9,058	869	1,958	125.3%
0.04%	Hong Kong	1,214	13	19	46.2%

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

Note: March 2022 Daily Arrivals reflect Civilian Air arrivals only

- South Korea Country Manager Mr. Jay Park presented the report on Market News, Airlines & Industry Intelligence, Destination Comparison, and Market Trends.



## AGENDA

### MARKET NEWS

- COVID-19 Specific Issue in Korea
- Quarantine Protocol

### AIRLINE & INDUSTRY INTELLIGENCE

- Korea Travel Industry Update
- KOR-GUM Airline Schedule
- FY/CY2022 Airline Operation Plan

### DESTINATION COMPARISON

### MARKET TRENDS

- Korean Travel Market Trend
- Marketing Plan for Q3

## 5. MARKET UPDATES

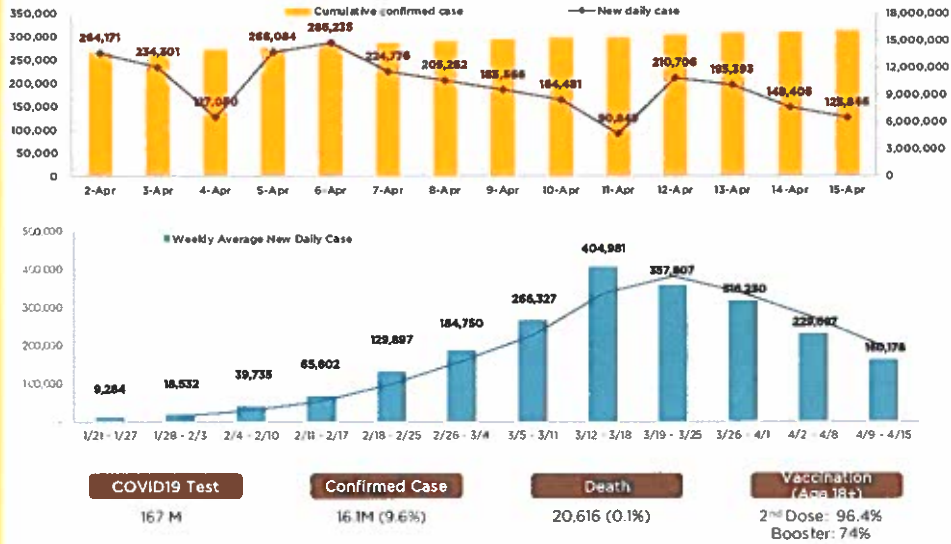


# MARKET NEWS



## KOREA COVID-19 STATUS

Source: Central Disaster and Safety Countermeasures Headquarters as of April 15



# MARKET NEWS



## COVID-19 SPECIFIC ISSUES

*"South Korea's omicron wave on a clear downward trend, preparing for transition to 'post-Omicron' era"*



**Overall special travel advisory over COVID-19 lifted from April 14**  
Special travel advisory affecting all overseas travel has been lifted except for 26 countries including China and Russia.



**Korea to lift all social distancing rules from April 18, except mask mandate**  
All COVID-19 social distancing rules including private gathering and business curfew will be lifted. First time all restrictions have been lifted since the pandemic began two years ago.



**Outdoor mask mandates planned to be scrapped in June & July**  
Outdoor mask mandate can be lifted if related COVID-19 counts continue to remain manageable within the country's medical response capacity.



**Korea to remove quarantine for confirmed cases from May 23**  
The government is set to downgrade COVID-19 to the second-highest level of its four-tier infectious disease control system, allowing COVID-19 confirmed patients to be free of 7-day mandatory self-quarantine.



## QUARANTINE PROTOCOL: TRAVEL BETWEEN KOREA-GUAM

April 1, 2022-

**No history of being confirmed with COVID-19 within 40 days of departure**

**If I am Vaccinated in Korea (Nationals, Foreigners)**

**If I am Vaccinated in overseas and registered vaccination history via Q-code (Foreigners):** [Q-code - Quarantine](#)  
[covid19.defence.kdca.go.kr](https://covid19.defence.kdca.go.kr)



CDC required all passengers arriving to the US to take a COVID-19 viral test before departure (airlines to check before boarding)

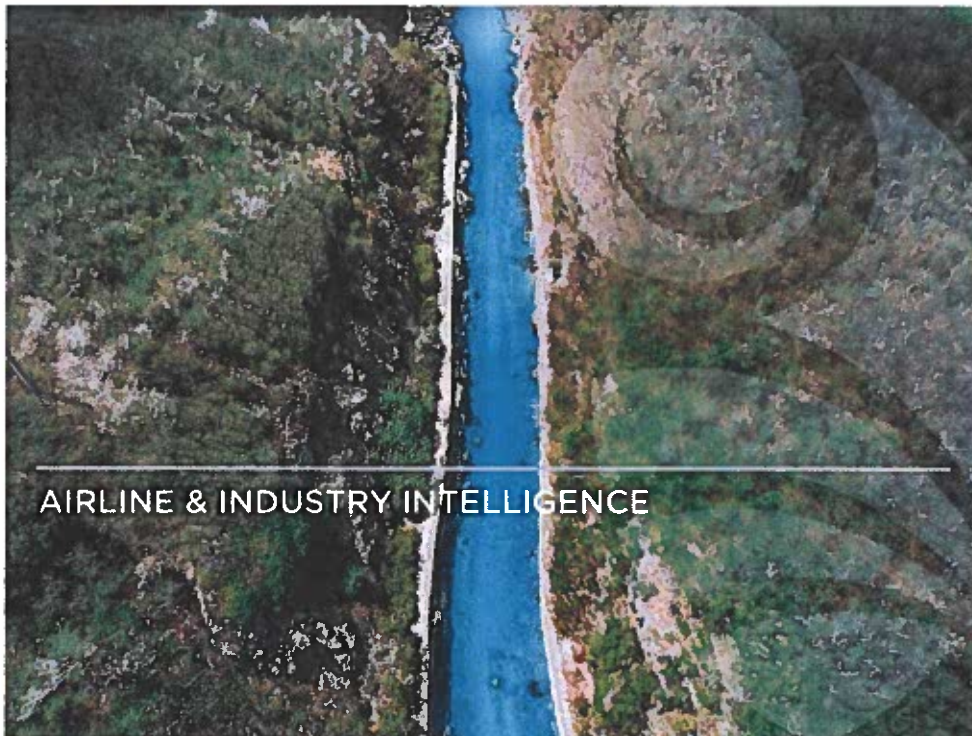
- **Viral test (PCR/Antigen)** within 1 day

- **Mandatory** (either ENG/KOR)
- **Accepted Test:** PCR, LAMP, TMA, SDA

**These who are vaccinated in overseas can directly enter their vaccination history into the [Q-code system](#) for quarantine exemption.**

*\*Children aged under 6 are exempted from quarantine and PCR test*

## 6. OLD BUSINESS



# ICN - GUM

## AIRLINE & INDUSTRY INTELLIGENCE



### KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)



YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	211,830	2 daily									
2022 (As of APR)	84,980	2x-weekly	4x-weekly (May 30 <sup>th</sup> -daily)	Daily + 3x-weekly							

32.9%



32.4%



#### Specific Issue

- New Managing Vice President: Park Yo Han
- Korean Air FAM Tour is ongoing / Guam sales contest is being conducted until May
- On the phase of sales recovery along with the surging travel demand and high sales record of cargo business





## AIRLINE & INDUSTRY INTELLIGENCE



### KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)



ICN-GUM

YEAR	SEAT CAPACITY	FREQUENCY										
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
2019	156,888	Daily							2 daily	Daily	2 daily	
2022 (As of APR)	49,140	4x-weekly		Daily								



Specific Issue

2019 Seat Supply  
156,888

Seat Supply as of April 2022  
49,140

- Increasing possibility of merger between three big LCCs: Jin Air, Air Busan, Air Seoul
- Diverse marketing collaboration with OTA platforms such as Klook

## AIRLINE & INDUSTRY INTELLIGENCE



### KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)



ICN-GUM

YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	76,073	Daily	Daily + 2x-weekly							Daily	
2022 (As of APR)	44,226	2x-weekly		4x-weekly (Mar 29 <sup>th</sup> -)	Daily						



Specific Issue

2019 Seat Supply  
76,073

Seat Supply as of April 2022  
44,226

- Planning to deploy mid to long-distance routes such as Singapore, Sydney, Hawaii and Europe by introducing new A330-300
- Resumed flight operation to Japan and Southeast Asian countries



# AIRLINE & INDUSTRY INTELLIGENCE



## KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)

ICN-GUM



YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	120,617	2 daily					3 daily				
2022 (As of APR)	41,769	N/A	4x-weekly			Daily					



2019 Seat Supply  
120,617



Seat Supply as of April 2022  
41,769

Specific Issue

- Focusing on mid- and short-haul destinations
- Expand cargo business to diversify the source of revenue

# AIRLINE & INDUSTRY INTELLIGENCE



## KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)

ICN-GUM



YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	77,614	Daily									
2022 (As of APR)	45,630	N/A	2x-weekly	4x-weekly	Daily			Daily + 2x-weekly			



2019 Seat Supply  
77,614



Seat Supply as of April 2022  
45,630

Specific Issue

- Preparing for the reoperation of Guam route in May in 800 days. Guam website promotion is ongoing
- Resumption of flights to holiday destinations, especially to Southeast Asian countries



# PUS - GUM

## AIRLINE & INDUSTRY INTELLIGENCE



### KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)

PUS-GUM



YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	69,658	Daily									
2022 (As of APR)	31,374	2x weekly		4x weekly				Daily			



**2019 Seat Supply**  
69,658



**Seat Supply as of April 2022**  
31,374

#### Specific Issue

- Jin Air Busan just conducted Travel Trade & Media FAM Tour
- Guam sales contest and website promotion is being conducted until May



# AIRLINE & INDUSTRY INTELLIGENCE



## KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)



PUS-GUM

YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	57,469	Daily	4x weekly	5x weekly					Daily		
2022 (As of APR)	36,740	N/A	2x weekly (April 30 <sup>th</sup> -)	4x weekly			Daily				



✓ Specific Issue

**2019 Seat Supply**  
57,469

**Seat Supply as of April 2022**  
36,740

- Active marketing promotion for Saipan route in cooperation with local hotels

# AIRLINE & INDUSTRY INTELLIGENCE



## KOREA TRAVEL INDUSTRY UPDATE: AIRLINE OPERATION (2019 VS. CURRENT)



PUS-GUM

YEAR	SEAT CAPACITY	FREQUENCY									
		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
2019	68,796	Daily									
2022 (As of APR)	30,429	N/A	2x weekly	4x weekly			Daily				



**2019 Seat Supply**  
68,769

**Seat Supply as of April 2022**  
30,429



# 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	2,152
Jin Air	LJ641	TUE/WED/FRI/SUN (Apr 15-)	9:10	14:35	2,457
T'way	TW301	WED/SAT (Apr 23-)	18:00	23:40	567
<b>TOTAL</b>					<b>5,176</b>

### 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
<b>TOTAL</b>					<b>1,165</b>



**TOTAL OUTBOUND SEAT CAPACITY (APRIL): 6,341 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 (May 30 <sup>th</sup> - Daily)	9:00	14:20	5,111
Jeju Air	7C3102	WED/THU/SAT/SUN	9:00	14:30	3,213
Jin Air	LJ641	TUE/WED/FRI/SUN	9:10	14:35	3,402
T'way	TW301	WED/SAT	18:00	23:40	1,701
Air Seoul	RS101	WED/SAT (May 14-)	08:15	13:35	975
<b>TOTAL</b>					<b>14,402</b>

### 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
<b>TOTAL</b>					<b>5,193</b>



**TOTAL OUTBOUND SEAT CAPACITY (MAY): 19,595 SEATS**



# AIRLINE & INDUSTRY INTELLIGENCE



## AIRLINE SCHEDULE - JUNE

### Incheon - Guam

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Korean Air	KE113	DAILY	9:00	14:20	8,070
Jeju Air	7C3102	WED/THU/SAT/SUN	9:00	14:30	3,402
Jin Air	LJ641	DAILY	9:10	14:35	5,670
T'way	TW301	WED/THU/SAT/SUN	18:00	23:40	3,402
Air Seoul	RS103	WED/THU/SAT/SUN	08:15	13:35	3,510
<b>TOTAL</b>					<b>24,054</b>

### 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
<b>TOTAL</b>					<b>4,973</b>



**TOTAL OUTBOUND SEAT CAPACITY (JUNE): 29,027 SEATS**

# AIRLINE & INDUSTRY INTELLIGENCE



## FY2022 AIRLINE OPERATION PLAN

\*Airline schedule is flexible, subject to change. As of April 15

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	2,152	5,111	8,070	8,339	8,339	8,070	52,090
JEJU AIR	7C3102	189	0	378	756	378	0	0	0	3,213	3,402	5,859	5,859	5,670	25,515
JIN AIR	LJ641/771	189	1,512	1,890	1,890	1,134	756	945	2,457	3,402	5,670	5,859	5,859	5,670	37,044
T'WAY	TW301	189	945	1,480	756	0	0	0	567	1,701	3,402	5,859	5,859	5,670	26,239
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	3,510	6,045	6,045	5,850	22,425
ASIANA AIR	O2607	188	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>ICN - GUM TOTAL</b>			<b>6,455</b>	<b>8,272</b>	<b>8,100</b>	<b>6,480</b>	<b>2,964</b>	<b>3,429</b>	<b>5,176</b>	<b>14,402</b>	<b>24,054</b>	<b>31,961</b>	<b>31,961</b>	<b>30,930</b>	<b>174,184</b>

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	3,402	3,213	3,213	13,041
JIN AIR	LJ647	189	0	0	0	0	0	0	945	1,701	1,512	3,402	3,213	3,213	13,986
AIR BUSAN	BX614	330	0	0	880	1,100	0	0	220	1,980	1,760	3,960	3,740	3,740	17,380
<b>PUS - GUM TOTAL</b>			<b>0</b>	<b>0</b>	<b>880</b>	<b>1,100</b>	<b>0</b>	<b>0</b>	<b>1,165</b>	<b>5,193</b>	<b>4,973</b>	<b>10,764</b>	<b>10,766</b>	<b>10,166</b>	<b>44,407</b>

KOR - GUM	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	TOTAL
<b>KOR - GUM TOTAL</b>	<b>6,455</b>	<b>8,272</b>	<b>8,980</b>	<b>7,580</b>	<b>2,964</b>	<b>3,429</b>	<b>6,341</b>	<b>19,595</b>	<b>29,027</b>	<b>42,725</b>	<b>42,127</b>	<b>41,096</b>	<b>218,591</b>
KOR - GUM ACTUAL ARRIVAL	995	3,662	1,421	841	311	760							<b>7,980</b>
<b>LF %</b>	<b>15%</b>	<b>44%</b>	<b>16%</b>	<b>11%</b>	<b>10%</b>	<b>22%</b>							

**FY2022 TOTAL SEAT CAPACITY (KOR-GUM): 218,591 SEATS**



## CY2022 AIRLINE OPERATION PLAN

*\*Airline schedule is flexible, subject to change. As of April 15*

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	3,497	3,497	3,497	10,491
KOREAN AIR	KE113	276	4,968	2,208	2,484	2,152	5,111	8,070	8,339	8,339	8,070	8,339	8,070	8,339	74,489
JEJU AIR	7C3102	189	378	0	0	0	3,213	3,402	5,859	5,859	5,670	5,859	5,670	5,859	41,769
JIN AIR	LJ641/771	189	1,134	756	945	2,457	3,402	5,670	5,859	5,859	5,670	5,859	5,670	5,859	49,140
T'WAY	TW301	189	0	0	0	567	1,701	3,402	5,859	5,859	5,670	5,859	5,670	5,859	40,446
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	3,510	6,045	6,045	5,850	6,045	5,850	6,045	40,365
ASIANA AIR	OZ607	188	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>ICN - GUM TOTAL</b>			<b>6,480</b>	<b>2,964</b>	<b>3,429</b>	<b>5,176</b>	<b>14,402</b>	<b>24,054</b>	<b>31,961</b>	<b>31,961</b>	<b>30,930</b>	<b>37,213</b>	<b>36,182</b>	<b>37,213</b>	<b>261,965</b>

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	3,402	3,213	3,213	5,859	5,670	5,859	30,429
JIN AIR	LJ647	189	0	0	0	945	1,701	1,512	3,402	3,213	3,213	5,859	5,670	5,859	31,374
AIR BUSAN	BX614	220	0	0	0	220	1,980	1,760	3,960	3,740	3,740	6,820	6,600	6,820	36,740
<b>PUS - GUM TOTAL</b>			<b>1,100</b>	<b>0</b>	<b>0</b>	<b>1,165</b>	<b>5,193</b>	<b>4,973</b>	<b>10,764</b>	<b>10,166</b>	<b>10,166</b>	<b>18,538</b>	<b>17,940</b>	<b>18,538</b>	<b>98,543</b>

KOR - GUM	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
<b>KOR - GUM TOTAL</b>	<b>7,580</b>	<b>2,964</b>	<b>3,429</b>	<b>6,341</b>	<b>20,918</b>	<b>31,295</b>	<b>42,725</b>	<b>42,127</b>	<b>41,096</b>	<b>58,751</b>	<b>54,122</b>	<b>55,751</b>	<b>364,099</b>
<b>KOR - GUM ACTUAL ARRIVAL</b>	<b>841</b>	<b>311</b>	<b>760</b>										<b>1,912</b>
<b>LF %</b>	<b>11%</b>	<b>10%</b>	<b>22%</b>										



**CY2022 TOTAL SEAT CAPACITY (KOR-GUM): 360,508 SEATS**

- Vice Chairman Ferguson asked about Mr. Park's current speculation for load factors.
- Mr. Park said that in his recent conversations with airlines, the load factors are uncertain, so he will continue to communicate with them to see the booking pace and trends. Mr. Park said he will include that information in his next KMC report.
- Ms. Leon Guerrero said that in GVB's recent meetings with the airlines, some have reported booking rates of over 1,000% starting in April, so GVB is hopeful that the pax will sustain air service and increase frequency to daily flights.
- Vice Chairman Ferguson asked if there is a difference in travel protocol between Seoul and Busan as it relates to children and their vaccine requirements to re-enter.
- Mr. Park said that the requirements are the same.
- Ms. Young Sook Hong described her experience with recent travel from Busan. When checking in, Jin Air said that anyone fully vaccinated in the United States cannot get on board in Busan, and if passengers have not been vaccinated in Korea, they can only go through Incheon airport. Ms. Hong described the confusion and discrepancy between the information from Korean government and the airline. She asked Mr. Park to get more information on the issue from the Jin Air management.
- Mr. Park said that there is no difference in regulation between Busan and Incheon, so there must have been miscommunication between Jin Air and the Korean government.
- Mr. Kim said that in his meeting with Jin Air Busan, they said that they have different entry protocols, but starting in May they will have the same protocols.
- Mr. Park said that children 5 years old and younger will rely on the vaccination status of their parents. Children 6-11 cannot travel without vaccination and must quarantine when they return to Korea.

- Vice Chairman Ferguson requested a slide in future KMC presentations about these travel regulations for children since it's influencing parents' travel decisions and historically most of the Korea market has been the family market.
- Ms. Leon Guerrero said that this type of information is included in GVB's Industry Report sent out to everyone regularly.

## 7. NEW BUSINESS





# DESTINATION COMPARISON



## DIRECT COMPETITOR UPDATE: TRAVEL PROTOCOLS & VACCINATION STATUS

	CNMI	HAWAII	Thailand	Philippines
Pre-departure Testing	Viral test within 1 day before departure *Children aged under 2 exempted		All vaccinated travelers exempted (*April 1) *Children aged under 6 exempted	RT-PCR test within 2 days or Antigen test within 1 day before departure *Asymptomatic children aged under 3 exempted
Entry Quarantine Exemption	No quarantine for vaccinated travelers Unvaccinated travelers under 18 (accompanied by vaccinated parents)		No quarantine for vaccinated travelers Travelers must stay within the hotel for the RT-PCR test result on Day 1	No 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 (less than 7N) 6th day of en-site arrival PCR test within 48 hours prior to departure to Korea (more than 8N)	PCR test within 48 hours prior to departure to Korea	Self-administered rapid antigen test on Day 5 of arrival PCR test within 48 hours prior to departure to Korea	PCR test within 48 hours prior to departure to Korea
Quarantine upon arrival in Korea	* No quarantine for fully vaccinated travelers			
Vaccination Status (as of April 13)	2 <sup>nd</sup> dose 100.0% Boost 61.2%	2 <sup>nd</sup> dose 77.8% Boost 11.8%	2 <sup>nd</sup> dose 71.3% Boost 15.4%	2 <sup>nd</sup> dose 60.8% Boost 18.4%

# DESTINATION COMPARISON



## GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



### Saipan: Specific Issue

- Extended its PCR test support for travelers indefinitely as well as support for five nights of quarantine for local confirmed patients
- 70% load factor restriction on Saipan route lifted

ROUTE	AIRLINES	FREQUENCY	PERIOD
ICN-SPN	OZ	2/W	Apr 1 - May 31
	7C	2/W	Apr 1 - May 31
	TW	3/W	May 26 -
	RS	2/W	Apr 1 - May 31
PUS-SPN	BX	2/W	Apr 1 - May 31
	7C	2/W	May 1 -



### Hawaii: Specific Issue

- Terminated Hawaii Safe Travels program for domestic travelers, paperwork no longer needed for entry
- Asiana Airlines reopened its ICN-HNL route in April 2020, 25 months after its suspension in March 2020

ROUTE	AIRLINES	FREQUENCY	PERIOD
ICN-HNL	KE	3/W → 5/W	May 3 -
	OZ	3/W	Apr 1 - May 31
	HA	4/W	April 6 -



# DESTINATION COMPARISON



## GLOBAL TOURISM TREND: DIRECT COMPETITOR UPDATE



Thailand: Specific Issue

- Dropped pre-departure COVID-19 test requirement for vaccinated travelers, plans to ease on-arrival COVID-19 PCR testing requirement in May
- Plans to hold 'Thailand Travel Mart Plus 2022' in Phuket in June, 2022

ROUTE	AIRLINES	FREQUENCY	PERIOD
ICN-BKK	KE	7/W	Apr 1 - May 31
	OZ	7/W	Apr 1 - May 31
	LJ	2/W	May 4 -



Philippines: Specific Issue

- Lifted limit to the number of international passengers arriving in all ports of entry in the country
- Allowed visa-free entry for foreign travelers for the first time since the outbreak of COVID-19

ROUTE	AIRLINES	FREQUENCY	PERIOD
ICN-MNL	KE	7/W	Apr 1 - May 31
	OZ	7/W	Apr 1 - May 31
ICN-CEB	7C	2/W	Apr 1 - May 31
	PR	4/W	Apr 19 -
ICN-CRK	7C	2/W	Apr 1 - May 31
	LJ	2/W	Apr 1 - May 31
PUS-MNL	LJ	4/W	Apr 19 - May 31
	7C	2/W	Apr 1 - May 31
PUS-CEB	7C	2/W	Apr 21 - May 31
	7C	4/W	Apr 19 -
	RY	2/W	May 27 -



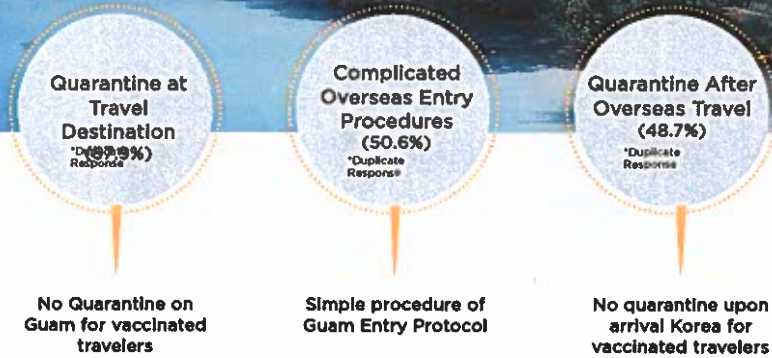
## MARKET TRENDS



# MARKET TRENDS



## KEY CONCERNS IN OVERSEAS TRAVEL (TOP 3)



Source: Korea Tourism Organization, 2022 Travel Trend Analysis

# MARKET TRENDS



## KOREAN TRAVEL MARKET TREND IN 2022



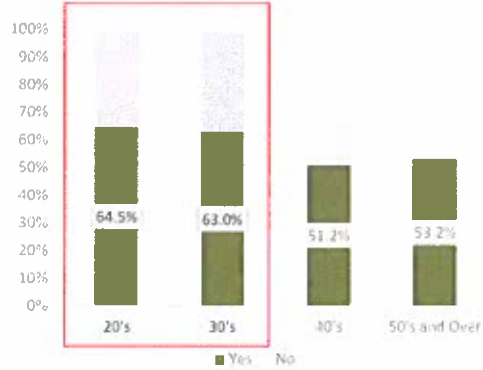
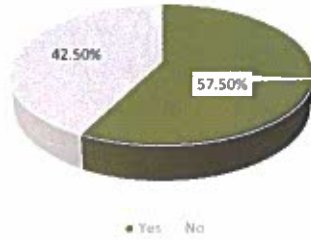
Source: American Express, 2022 Global Travel Trends Report



# MARKET TRENDS



## WILLINGNESS TO TRAVEL OVERSEAS



The rate of intention to travel abroad in 2022 was relatively higher in the age group of 20's and 30's.

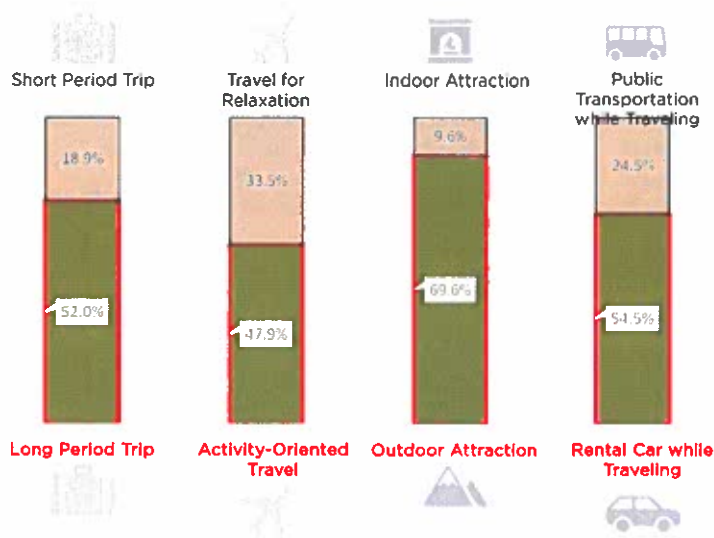
Source: Korea Tourism Organization, 2022 Travel Trend Analysis

# MARKET TRENDS



## OVERSEAS TRAVEL PREFERENCES

Source: Korea Tourism Organization, 2022 Travel Trend Analysis



# MARKET TRENDS



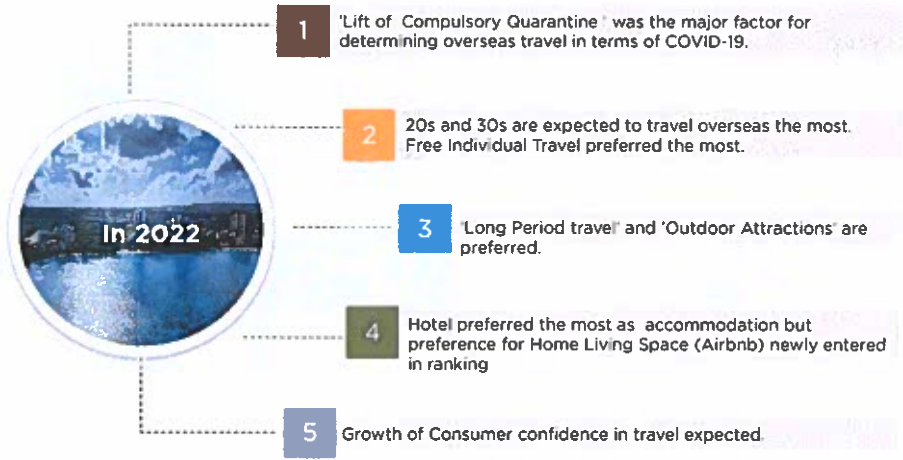
TRAVEL PATTERNS AND TREND IN 2022 Source: Korea Tourism Organization, 2022 Travel Trend Analysis



# MARKET TRENDS



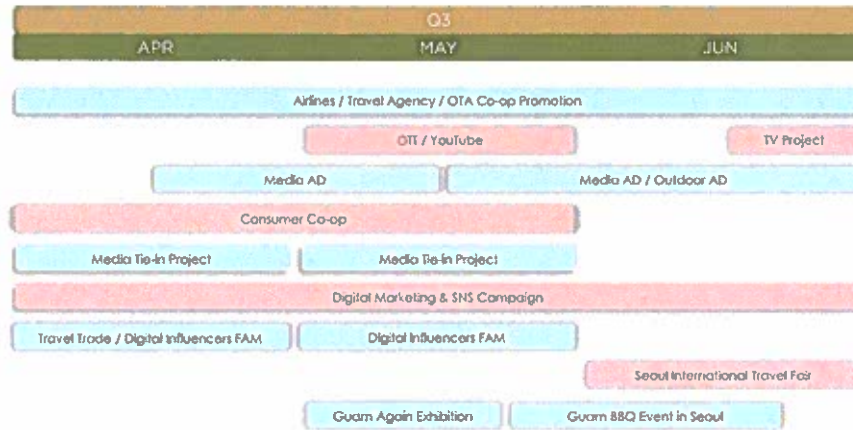
## KEY INSIGHTS



# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3



# MARKET TRENDS



## GVB STRATEGIC MISSION

- **Period:** April 1 – 8, 2022
- **Purpose:** To bolster tourism promotion activities
- **Delegation:**
  - KMC Chairman
  - GVB President & CEO
  - Director of Global Marketing
  - Korea market marketing coordinator



# MARKET TRENDS



## GVB STRATEGIC MISSION: KEY DISCUSSION WITH TRAVEL TRADE PARTNERS



- 01 Booking rate rise upon quarantine lift**  
 There was direct reaction after the quarantine exemption, where the partners have found a **noticeable increase on the booking rate**. (Korean Air: over 500% during the past 1 month, Mode Tour: 17.4% over the last 2 weeks)
- 02 Up-scale demand on trend**  
 U-scale demands have been increasing centering on the young generation in their 20-30s. Accordingly, Guam will keep on developing infrastructure and other travel elements.
- 03 Specified segmentation on FIT target**  
 Consumers' interests are specified. Guam will have to develop and promote infrastructure and travel elements that would satisfy this target (ex. Golf, glamping, scuba diving, private yacht tour, etc.)
- 04 Keep focusing on 'Safety'**  
 Still, travelers' biggest concern of traveling is 'safety'. GVB will have to keep attention to the safe travel and let the Korean audience know about these efforts.
- 05 Cargo development opportunities**  
 LCCs are bringing attention to operate cargos and possibilities of contracting with Guam to bring in agricultural goods have been discussed.

# MARKET TRENDS



## GVB STRATEGIC MISSION: MEDIA EXPOSURE



# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Jin Air Busan FAM Tour

- **Period:** April 16 – 19, 2022
- **No of pax:** 16pax (8 TAs + 1 Jin Air, 5 media, 2 GVB KR)

### Korean Air FAM Tour

- **Period:** April 17 – 21, 2022
- **No of pax:** 11pax (8 TAs + 1 Korean Air + 2 GVB KR)



# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Airline & Travel Agency Support Items - ongoing

#### Korean Air Sales Contest

- **Period:** March 28 – May 13, 2022
- **TAs:** Hana tour, Mode tour, Very Good tour, Hanjin travel, Online tour, KRT, Interpark
- **Scheme:**
  - Open Guam website promotion page on each TA's website for sales
  - Provide incentives per ticket sales

#### Jin Air Busan Sales Contest & Website Promotion

- **Period:** April 16 – May 31, 2022
- **TAs:** Hana Tour, Mode Tour, Hana M&C, Interpark Tour, Lotte, KRT, Very Good Tour, Hanjin Travel
- **Scheme:**
  - Open Guam website promotion page on each TA's website for sales
  - Provide incentives per ticket sales

#### Travel Agency Support

- **Period:** April – May, 2022
- **TAs:** YB Tour, Bomulsum Tour, Lotte Tour, Web Tour, KRT
- **Promotion:**
  - TV Home shopping, social commerce promotion, content production, etc.





# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Airline & Travel Agency Support Items – potential

#### Air Busan FAM Tour

- **Period:** in May, 2022
- **No of pax:** 25pax (TAs & Media & BX filming crew)
- **Brief schedules:**
  - TA: Hotel Inspections, optional Tour
  - Media: Film tourist spots and activity
  - BX filming crew: Film youtube contents



#### Air Seoul Co-op Promotion (Guam Offline Event at Coffeebean)

- **Period:** May 16 - 31, 2022 (tentative)
- **Venue:** Coffeebean (Gwanghwamun branch – approx. 800 traffics per day)
- **Scheme:**
  - Decorate a space with Guam theme and lounge concept
  - Hold Guam day on the first day of event
  - Provide Guam information and conduct raffle event



#### Gwangju Travel Agency FAM Tour

- **Period:** May or June, 2022 (tentative)
- **No of pax:** 20pax (Travel agencies in Gwangju)
- **Scheme:**
  - Invite travel agencies in Gwangju for education purpose as Gwangju is one of the major city in Korea (Jeju Air operated Muan-Guam flight in 2019)



# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Digital Influencers FAM Tour

- **Period:** April 21 - 24, 2022
- **No of pax:** 4pax (2 couples)
- **Deliverables:** 20 posts (5 Instagram posts x 4 influencers) & 1 video



@life\_seol: 8k



@ikkuually: 38.1k



@ram\_ram0: 42.6k



@raw\_j: 10.5k



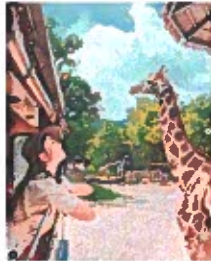
# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Digital Influencers FAM Tour

- **Period:** in May (exact dates TBD)
- **No of pax:** 4pax (MZ gen)
- **Deliverables:** 20 posts (5 Instagram posts x 4 influencers) & 1 video



@idler.bin: 47.5k



@sinaeannn: 38.1k



@\_travelmaster: 15.2k



@brightgraphy: 13k

Digital content will be used for marketing purposes.

# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### "Guam Again" Exhibition in Seoul

- **Period:** May 13 – 22, 2022 (10-day)
- **Venue:** Lotte Duty Free Lounge
- **Target:** Lotte Duty Free Membership, FITs, general consumers, potential travelers, etc.
- **Scheme:**
  - Decorate the spaces and showcase Guam photos and video. Also, display the artworks produced by artist who participated in Guam Eco Wave in 2018.
  - Hold opening event, invite media and influencers to maximize exposure



# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Seoul International Travel Fair (SITF)

- **Period:** June 23 - 26, 2022
- **Venue:** COEX, Seoul
- **Host:** Seoul International Travel Fair Organizing Committee
- **Organizer:** KOTFA Co., Ltd
- **Sponsor:** Ministry of Culture, Sports and Tourism, Seoul Metropolitan Government, KTO, KTA, The Tourism Sciences Society of Korea
- **Guam Pavilion**
  - Invite co-exhibitors to Guam pavilion
  - Provide one-on-one table and monitor



Guam pavilion concept, invitation to GVB members to collaborate and exhibit

# MARKET TRENDS



## MARKETING PLAN OVERVIEW FOR FY2022 Q3

### Guam BBQ Block Party in Seoul

- **Period:** Week of June 20th
- **Venue:** Grand Hyatt Seoul
- **Scheme:**
  - Hold Guam Food Festival (Guam BBQ Block Party) at the Grand Hyatt Seoul
  - Decorate the spaces with Guam theme and provide Guam food
  - Invite travel trade partners, media, digital influencers, youtubers to event



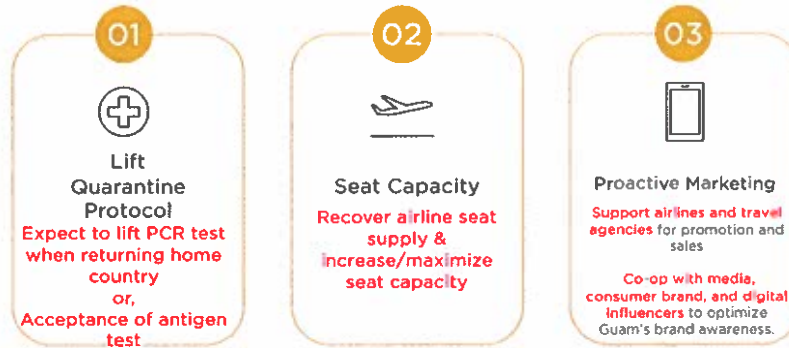
Coincide with SITF, invite cook/chef from Guam



## SUMMARY



### KEY POINT



- Vice Chairman Ferguson asked about the expected seat capacity trending per month
- Mr. Park said that in just the last month it increased by 50% for the summer season and most airlines originally were targeting June or July but are now targeting May.
- Vice Chairman Ferguson said that information would be a good barometer of demand.



- Ms. Hong said she received an inquiry about how to review an expired tour guide license. Ms. Leon Guerrero said that they should have received an email on how to review, but if Ms. Hong gives their information, GVB can contact them and assist.
- Ms. Ki Kim asked about the extension of GVB's free PCR Testing Program. Ms. Leon Guerrero said that GVB is committed to providing free COVID testing until the end of September. The current model of the program has been extended to the end of May,

and GVB is looking into different testing alternatives that are more sustainable and not as expensive.

- Mr. Oh said that the websites of some clinics say it's only continuing until the end of April. Ms. Leon Guerrero said that the clinics are updating that information now. She added that GVB's program is a significant marketing advantage compared to other destinations, considering the price of PCR testing. Mr. Park added that antigen tests in Korea are much cheaper than PCR tests.
- Ms. Kim asked about support for visitors who test positive for COVID while on Guam. Ms. Leon Guerrero said that in recent cases like this since the quarantine facility closed, GVB has helped them find accommodation, but at this point, GVB is not providing financial support. GVB is currently exploring the possibility of helping with their meals.
- Vice Chairman Ferguson said that the decision is up to the hotels who may offer their distressed passenger rate, which is quite a bit cheaper than the regular rate.
- Mr. Oh asked if GVB could put together information on what each hotel could offer passengers in these situations. Ms. Sablan said that GVB has been discussing an SOP on how to work with the tour agents and steps for what to do when a visitor tests positive. Ms. Leon Guerrero added that we are encouraging visitors to not check out of their hotel until they receive their test results.


## 8. ANNOUNCEMENTS

- Next meeting: Tuesday, May 17, 2022 at 3:30 p.m. (subject to change)

## 9. ADJOURNMENT

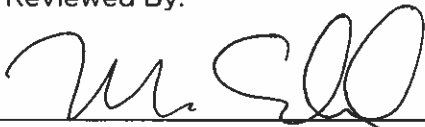
Mr. Oh motioned to adjourn the meeting at 4:20 p.m., seconded by Mr. Kim. **Motion approved.**

Minutes Prepared By:



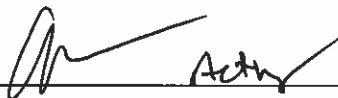
Nicole B. Benavente, Marketing Coordinator - Korea

Minutes Reviewed By:



Margaret Sablan, Marketing Manager - Korea

Minutes Approved By:



Elaine Pangelinan, Acting Director of Global Marketing

