

INDUSTRY REPORT

AUGUST 22, 2025



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MARKET INTELLIGENCE REPORT

As of August 22, 2025 and may be subject to change.



MARKETS AT-A-GLANCE



MARKETS AT-A-GLANCE



JAPAN

- Total outbound seat capacity for August remains at 42,738; September at 38,034; and October at 38,754.
- Marketing intelligence, marketing activities, and Weekly Guam digital PR articles

SOUTH KOREA

- Nine LCCs in operation in Korea as market expands
- Golden October holiday set to boost overseas travel
- Total outbound seat capacity for August remains at 69,493; September at 62,591; and October at 56,973.
- Media monitoring of press releases; and SNS weekly activity

DETAILS ARE FOUND IN THE APPENDIX

TAIWAN

- Typhoon forces major transportation shutdowns in Taiwan
- New metro line from Taipei to Taoyuan promises boost for tourism
- Marketing activities; media monitoring; etc.

PHILIPPINES

- Philippine Airlines launches 2025 "Ultimate Seat Sale"
- NAIA 'Green Lane' scanning suspended to avoid long lines
- United Airlines and Philippine Airlines continue to fly daily in August 2025 and are offering specials
- Marketing activities; etc.

JAPAN



JAPAN AIRLINE INTELLIGENCE



AIRLINE OPERATION - AUGUST *As of August 18, 2025

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
UNITED AIRLINES	Available	UA 827	NRT	11:0 0 / 15:45	Daily	5,146
200	Available	UA 197	NRT	17:00/21:40	Daily	5,146
	Available	UA 874	NRT	21:05/1:50+1	Mon, Wed, Fri, Sat	3,320
	Available	UA865	NRT	16:55/21:35	Mon, Wed, Fri, Sat	3,320
	Available	UA848	HND	23:35/4:25+1	Daily	5,146
	Available	UA 136	NGO	11:30 / 16:00	Mon, Tue, Thu, Fri, Sun	3,486
	Available	UA 150	KIX	11:0 5/ 15:40	Daily	5,146
					TTL	30,710

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
W JAL	Available	JL941	NRT	9:30 / 14:15	Daily	6,169
t°way	Available from July 18, 2025	TW 50 9	KIX	10:40 / 15:30	Daily	5,859
					TTL	12,028

JAPAN AIRLINE INTELLIGENCE



AIRLINE OPERATION - SEPTEMBER *As of August 18, 2025

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
UNITED AIRLINES	A vailable	UA827	NRT	11:00/15:45	Daily	4,980
2/2/18.	Available	UA 197	NRT	17:00/21:40	Daily	4,980
	Available	UA874	NRT	21:05/1:50+1	Mon, Wed, Fri, Sat	0
	Available	UA865	NRT	16:55/ 21:35	Mon, Wed, Fri, Sat	2,822
	Available	UA848	HND	23:35/4:25+1	Daily	4,980
	Available	UA 136	NGO	11:30 / 16:00	Mon, Tue, Thu, Fri, Sun	3,652
	Available	UA 150	KIX	11:0 5/ 15:40	Daily	4,980
			, ,		TTL	26,394

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
W JAL	Available	JL941	NRT	9:30 / 14:15	Daily	5,970
t°way	Available from July 18, 2025	TW 50 9	KIX	10:40 / 15:30	Daily	5,670
					TTL	11,640

JAPAN AIRLINE INTELLIGENCE



AIRLINE OPERATION - OCTOBER *As of August 18, 2025

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
UNITED AIRLINES	Available	UA827	NRT	11:00/15:45	Daily	5,146
1,50 mil.	Available	UA 197	NRT	17:00/21:40	Daily	5,146
	Available	UA 874	NRT	21:05/1:50+1	Mon, Wed, Fri, Sat	0
	Available until October 25	UA865	NRT	16:55/ 21:35	Mon, Wed, Fri, Sat	2,490
	Available	UA 848	HND	23:35/4:25+1	Daily	5,146
	Available	UA 136	NGO	11:30 / 16:00	Mon, Tue, Thu, Fri, Sun	3,652
	Available	UA 150	KIX	11:0 5/ 15:40	Daily	5,146
					TTL	26,726

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
Q JAL	Available	JL941	NRT	9:30 / 14:15	Daily	6,169
t°way	Available from July 18, 2025	TW 50 9	KIX	10:40 / 15:30	Daily	5,859
					TTL	12,028

JAPAN MARKETING ACTIVITIES



GVB AND UNITED AIRLINES HOST GUAM EDUCATIONAL FORUM IN TOKYO

- In partnership with United Airlines, GVB hosted an educational forum in Tokyo to promote student and educational travel to Guam
- Over 40 participants attended and were comprised of education and group travel agents, teachers, and media
- The program featured presentations by GVB, United Airlines, University of Guam, a Guam study-abroad coordinator, and Japanese educators
- GVB aims to further expand the edu-tourism market with programs focusing on learning English and SDGs







JAPAN MARKETING ACTIVITIES



WEEKLY GUAM

Weekly Guam is one of GVB's ongoing efforts to promote visitor-friendly sites, businesses, and/or attractions in Guam.

This week's topics include:

- Enjoying Guam's Ocean on a Sunset Cruise
- Yokai Parade: Supernatural Monsters from Japan Exhibition
- A secret hideaway for photography lovers
- The first Tumon Night Market was a huge success

Go to the visitguam.jp website or click <u>here</u> to access more Guam articles.

If you would like your business to be featured on Weekly Guam, please contact Yusuke Imazu at imazu@leapguam.com.









SOUTH KOREA



KOREA MARKET INTELLIGENCE





NINE LCCS IN OPERATION IN KOREA AS MARKET EXPANDS

South Korea's LCC market has grown to nine carriers, now split between long-haul operators (Air Premia, Parata Air, T'way Air) expanding with wide-body fleets to North America and Europe, and short-haul operators (Jeju Air, Jin Air, Eastar Jet, Air Busan, Air Seoul, etc.) focusing on regional routes. While this segmentation enhances market diversity, rising competition and cost pressures highlight the need for differentiated strategies and service competitiveness to ensure sustainable growth.

GOLDEN OCTOBER SET TO BOOST OVERSEAS TRAVEL

Incheon International Airport expects passenger traffic to reach up to 76.3 million in 2025, reflecting a 7.2% increase from last year, driven by strong outbound travel demand during the extended October holiday period. Rising China-bound traffic due to eased visa rules and expanded charter flights to destinations like Japan, Vietnam, and Taiwan are expected to fuel growth.



KOREA AIRLINE INTELLIGENCE



AUGUST AIRLINE SCHEDULE *As of August 18, 2025

•INCHEON - GUAM

*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
	KE421	DAILY	09:45	15:15	10,431	
Korean Air	KE423	DAILY	18:40	00:10+1	10,430	
	KE8425*	DAILY	17:15	22:45	8,825	
loiu Air	7C3101**	DAILY	10:40	16:05	4,914	
Jeju Air	7C3107	DAILY	20:20	02:00+1	5,859	
Jin Air	LJ913	DAILY	09:20	14:45	5,859	
JIN AIF	LJ917	DAILY	20:50	02:30+1	5,859	
T'way Air	TW505	DAILY	09:00	14:30	5,859	
	TOTAL					

^{*}KE8425 (3rd Flight): Aug 1st - Oct 25th / Daily

BUSAN - GUAM

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jin Air	LJ921	Daily	21:00	02:00+1	5,859
Korean Air	KE2259*	Daily	20:55/21:05/21:10	02:10+1/02:20+1/ 02:25+1	5,598
		TOTAL			11,457

^{*}KE2259: Aug 1st – Oct 25th: Daily / Departure and Arrival time varies

^{**7}C3101: Aug 27th – Aug 31st: Suspension

KOREA AIRLINE INTELLIGENCE



SEPTEMBER AIRLINE SCHEDULE *As of August 18, 2025

•INCHEON - GUAM

*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
	KE421	DAILY	09:45	15:15	10,140	
Korean Air	KE423	DAILY	18:40	00:10+1	10,140	
	KE8425	DAILY	17:15	22:45	8,939	
Jeju Air	7C3107*	DAILY	20:20	02:00+1	1,323	
	LJ913	DAILY	09:20	14:45	5,670	
Jin Air	LJ917	DAILY	20:50/19:35	02:30+1/01:15+1	5,670	
	LJ919**	DAILY	17:35	23:10	5,292	
T'way Air	TW505***	DAILY	09:00	14:30	4,347	
	TOTAL					

^{* 7}C3107: Sep 1st ~Sep 7th : Operation

· BUSAN - GUAM

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
Jin Air	LJ921	Daily	21:00	02:00+1	5,670	
Korean Air	KE2259	Daily	20:55/21:05/21:10	02:10+1/02:20+1/ 02:25+1	5,400	
	TOTAL					

TOTAL OUTBOUND SEAT CAPACITY: 62,591 SEATS

^{**}LJ919: Sep 2nd – Sep 29th: Operation

^{***}TW505: Sep 2nd – Sep 8th (Temporary suspension)

KOREA AIRLINE INTELLIGENCE



OCTOBER AIRLINE SCHEDULE

*As of August 18, 2025

•INCHEON - GUAM

*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
	KE421	DAILY	09:45	15:15	10,080	
Korean Air	KE423	DAILY	18:40	00:10+1	8,450	
	KE8425*	DAILY	17:15	22:45	3,982	
Jeju Air	7C3101**	DAILY	10:40	16:05	3,501	
Seju Ali	7C3107***	DAILY	20:20	02:00+1	1,890	
	LJ913	DAILY	09:20	14:45	5,859	
Jin Air	LJ917	DAILY	20:50/19:35	02:30+1/01:15+1	5,859	
	LJ919****	DAILY	17:35	23:10	3,402	
T'way Air	TW505****	DAILY	09:00	14:30	3,591	
	TOTAL					

*KE8425: Oct 1st ~ Oct 25th Operation

7C3101: Oct 14th ~ Oct 25th (Temporary suspension) / *7C3107: Oct 2nd ~ Oct 11th: Operation, Oct 12th~: Suspension

**** LJ919: Oct 14th ~ Dec 31st: Operation

*****TW505: Oct 20th ~Nov 14th (Temporary suspension)

• BUSAN - GUAM

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
Jin Air	LJ921	Daily	21:00	02:00+1	5,859	
Korean Air	KE2259*	Daily	20:55/21:05/21:10	02:10+1/02:20+1/ 02:25+1	4,500	
	TOTAL					

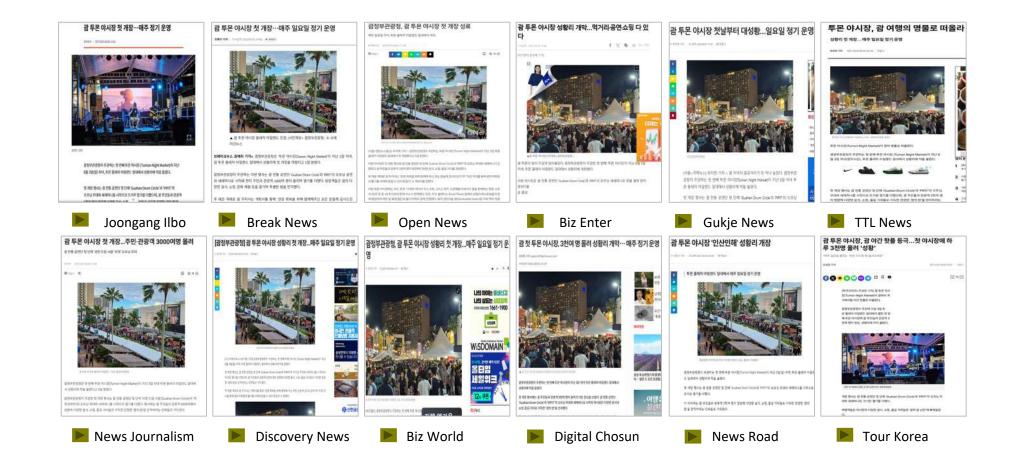
TOTAL OUTBOUND SEAT CAPACITY: 56,973 SEATS

KOREA MARKET INTELLIGENCE



MEDIA COVERAGE

Thousands turn out for Guam's first Tumon Night Market



TAIWAN



TAIWAN AIRLINE INTELLIGENCE



Operation Schedule: August *As of August 15, 2025 AIRLINES

Flight	Departure (local time)	Arrival (local time)	Frequency
TPE-GUM UA 0166	10:30 a.m	4:20 p.m	Every Wednesday
	11:00 a.m	4:50 p.m	Every Saturday
GUM-TPE UA 0165	7:00 a.m	9:25 a.m	Every Wednesday, Saturday

- The limited-time promotion for TPE-GUM route has been extended to September 26, 2025. The promotional fares are US\$304 (TWD 10,000, tax excluded) with a new discounted economy K-class fare of US\$380 (TWD 12,500, tax excluded) for both B2B and B2C channels.
- UA is offering a limited-time promotion for the TPE-GUM Wednesday departures.
 Promotional fares start at US\$276 (TWD 8,500, G-class, tax excluded) and US\$357 (TWD 11,000, K-class, tax excluded) valid for travel until Oct. 1, 2025 and ticketing by Sept. 1, 2025. Group fares for 10 or more passengers are available.

TAIWAN MARKET INTELLIGENCE





TYPHOON FORCES MAJOR TRANSPORTATION SHUTDOWNS

Typhoon Podul caused major transportation chaos in Taiwan on August 13, halting Taiwan Railway's Taitung and South Link lines, suspending express trains, and prompting Taiwan High Speed Rail to enforce emergency non-reserved seating after 2 pm. Airline schedules were also affected with 381 flight cancellations, including 252 domestic and 129 international routes.

NEW METRO LINE FROM TAIPEI TO TAOYUAN PROMISES BOOST FOR TOURISM

Taiwan has approved a 4.03 km Sanying Line extension from Yingge to Dannan in Taoyuan, adding three stations by 2028 which aims to improve connectivity and stimulate regional tourism. The new line will link Taipei landmarks with Taoyuan attractions, enabling diverse city-to-countryside travel in one seamless journey. Beyond tourism, the extension will boost commuter convenience, reduce road congestion, and support sustainable transport, benefitting local businesses and aligning with Taiwan's strategy to make public transit central to both daily life and visitor experiences.



TAIWAN MARKETING ACTIVITIES



MEETING WITH U.S. CANADA VISITING LEADERS DELEGATION (USCVLP)

- August 13, 2025
- MoFA arranged a meeting for the delegation to meet with ASOA
- Delegates inquired about the structure and functions of representative offices in Taiwan
- As Taiwan's new tariffs on U.S. imports were announced recently, the meeting included active discussions on its potential impact, addressing questions on how the tariffs will affect enterprises in Taiwan



ASOA MONTHLY MEETING IN AUGUST

- August 15, 2025
- During ASOA's meeting, members discussed key updates and reminders
- Members were reminded of upcoming events for the remainder of the year - 2025 SEMICON Taiwan, 2025 Taiwan-U.S. City Industry and Business Opportunity Matchmaking Conference, U.S. Investment Opportunities Conference, and the Taipei International Travel Fair





PHILIPPINES



PHILIPPINES AIRLINE INTELLIGENCE





Popular PAL Flights Deals to Guam!

MNL to GUM	MNL to GUM
Sept 12-22, 2025	Sept 24-27, 2025
From US \$297* Round-trip Economy	From US \$297* Round-trip Economy

https://flights.philippineairlines.com/en/flights-to-guam

*Fares displayed have been collected within the last 48 hrs and may no longer be available at time of booking. Quoted fairs includes taxes, fees, and surcharges except PH Travel Tax paid at the airport.



Featured Daily Fairs for Flights from MNL to GUM

Aug 2025	Sep 2025	Oct 2025
From US \$354* Round Trip Economy	From US \$324* Round Trip Economy	From US \$324* Round Trip Economy

https://www.united.com/en-ph/flights-from-manila-to-agana-guam https://www.united.com/en-ph/flights-to-agana-guam?redirecturl=true

*Prices have been available for round trips within the last 48 hours and may not be currently available. For Economy class, fares listed may be Basic Economy, which is our most restrictive fare option and subject to additional restrictions.

Airline	Flight	Frequency	Departure	Arrival
Philippine Airlines	PR110	- Daily	MNL 22:30	GUM 04:30 ⁺¹
Terminal 1	PR111		GUM 06:00	MNL 07:55
	UA184	- Daily	MNL 22:25	GUM 04:20 ⁺¹
	UA183		GUM 19:55	MNL 21:50
United Airlines Terminal 3	UA192 via Koror	Tues/Fri	MNL 22:40	GUM 06:30
	UA193 via Koror		GUM 19:55	MNL 23:50

PHILIPPINES MARKET INTELLIGENCE





PHILIPPINE AIRLINES LAUNCHES 2025 "ULTIMATE SEAT SALE"

Flag carrier Philippine Airlines has launched its 2025 Ultimate Seat Sale that will conclude on August 31, 2025, rewarding value-conscious travelers and meticulous planners with PAL's biggest, most value-packed fares of the year. Under this sale, international flights will go for as low as \$59 (roundtrip economy base fare) while domestic flights start at P189 (one-way economy base fare).

PAL's ultimate seat sale launched on August 18, 2025, closely following GVB's Manila-Guam exclusive seat sale promotion, which ran from August 8-17, 2025. Special fares for Guam-Manila included in this ultimate seat sale reflect prices as low as \$379 (roundtrip economy base fare) and \$849 (roundtrip business base fare).

PH TRAVELERS NOT AFFECTED BY NEW US VISA BOND PROGRAM

Travelers from the Philippines will not be required to post a bond of up to \$15,000 to apply to enter the United States under the US State Department's new pilot program. Effective August 20, the State Department will require business and tourist visa applicants from Zambia and Malawi to pay bonds under a new 12-month pilot program, according to a notice posted on its website. If visitors comply with the terms of the bond, the amount will be refunded. The new rule targets travelers from countries with higher rates of visa overstays, according to the department's temporary final rule published August 5 in the Federal Register. It excludes visitors from Mexico, Canada and over 40 countries enrolled in the US Visa Waiver Program, which allows travel to the US for tourism or business for up to 90 days without a visa.



PHILIPPINES MARKETING ACTIVITIES



EXCLUSIVE SEAT SALE PROMOTION FOR MANILA-GUAM ROUTE

- In collaboration with Philippine Airlines, GVB launched a seat sale promotion for the Manila-Guam route
- Promotion ran from August 8-17, 2025 with a travel period of September 1, 2025 onwards
- The seat sale was displayed on the following PAL channels: PAL website, ticket offices, contract center, travel agents, and OTAs
- Boosted ad on Facebook received 4.1K likes, 319 comments, and 75 shares
- Organic post on Facebook received 270 likes, 15 comments, and 42 shares



PHILIPPINES MARKETING ACTIVITIES



AUSTRALIA AND NEW ZEALAND CHAMBER OF COMMERCE

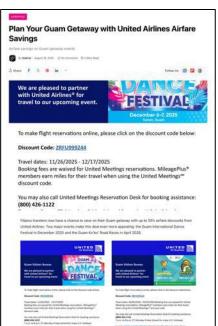
- August 12, 2025
- GVB Philippines attended the ANZCHAM conference and membership meeting at Makati Shangri-La Hotel
- Held discussions with key members to promote Guam as a MICE destination
- Attendees were comprised of professionals, executives, and entrepreneurs with ANZ passports or U.S. visas

AMERICAN CHAMBER

- August 13, 2025
- GVB Philippines attended the AmCham membership meeting at the Dusit Thani Manila Hotel
- Discussions with members positioned Guam as a competitive destination for regional leisure travel
- Attendees were comprised of executives, entrepreneurs, and company decision-makers with U.S. passports or visa

MEDIA MONITORING/PRESS PICK-UPS

- GVB monitored a total of 2 media pick ups from August 18-22, 2025
- Press releases highlighted GVB's signature events listed on the United Airlines Meetings Portal (International Dance Festival & Ko'ko' Road Race)
- Total PR value amounts to \$5,818







APPENDIX

As of August 22, 2025 and may be subject to change.

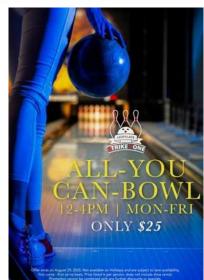


DESTINATION UPDATES

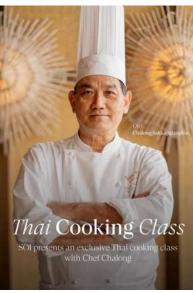


GUAM EVENTS - AUGUST & BEYOND



























For more info, visit our website or click here.

GUAM EDF







cqa.guam.gov

The Guam Electronic Declaration Form (Guam EDF) is a mandatory digital form, available 72 hours before arrival. Each arriving passenger or a responsible family member must fill out the form in English, with one form per family.







MANDATORY ELECTRONIC DECLARATION FORM

As of February 4, 2025, the Guam EDF is now MANDATORY upon entry into Guam. All persons arriving in Guam must comply with United States and Guam laws prior to their arrival. For your convenience, the form may be completed up to 72 hours prior to arrival date.

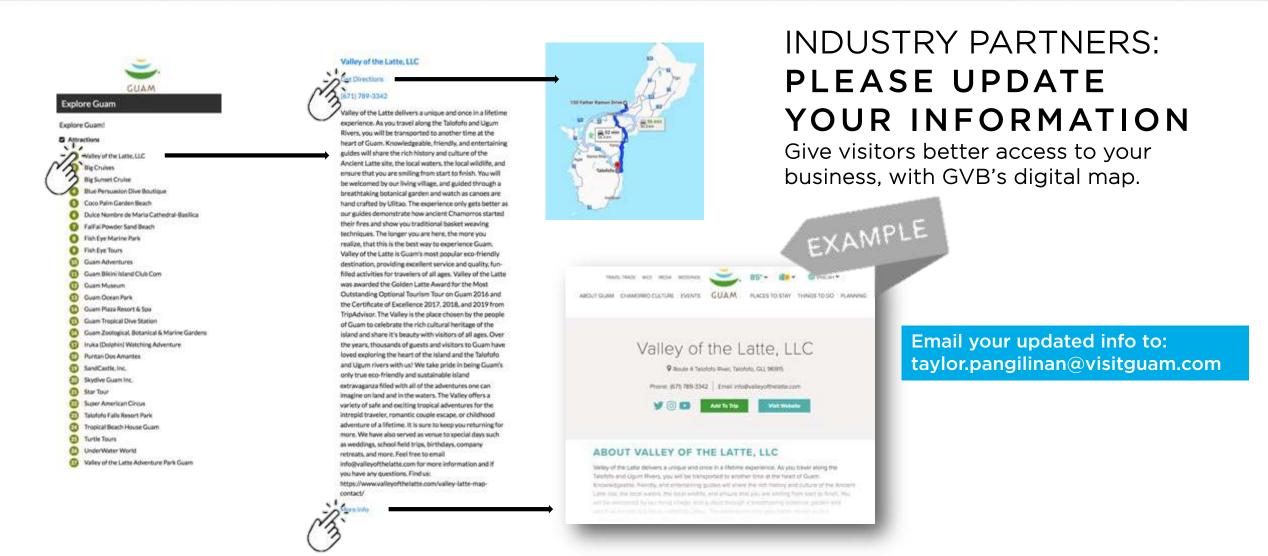
Access the Guam EDF from our GVB website or the Guam CQA website.

https://www.guamvisitorsbureau.com/ https://cqa.guam.gov/

as of 22 August 2025

EXPLORE GUAM - MAP





as of 22 August 2025

MEMBERSHIP RENEWAL



CALLOUT FOR RENEWAL!

Renew now! Visit the online application at https://www.visitguam.com/membership-application/

See the latest regarding GVB Membership here: https://www.guamvisitorsbureau.com/membership

The payment online via the GVB Membership Entremet. After submitting the application form below, the invoice can be found in the membership entremet. (The invoice may not be reactly envisible on it is being processed. Please logal at a later time to other agent. If you still are unable to occase entrement, after the processed in the submitted for direction of the submitted to other agent. If you still are unable to occase entrement, after the processed in the submitted for direction of the s

Fill out the membership application online and renew!

https://www.visitguam.com/membership-application/