

INDUSTRY REPORT

AUGUST 8, 2025



TABLE OF CONTENTS



- 4 MARKETING UPDATES
- 6 JAPAN
- **14** SOUTH KOREA
- 19 TAIWAN
- **24** PHILIPPINES
- 29 DESTINATION UPDATES



MARKET INTELLIGENCE REPORT

As of August 8, 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

- Total outbound seat capacity for August remains at 69,482; September at 62,398; and October at 59,323.
- · Media monitoring of press releases; and SNS weekly activity

TAIWAN

- Taiwan records a robust 30% growth from India market
- Taiwan's northern cities target Singapore in tourism push
- Marketing activities; media monitoring; etc.

PHILIPPINES

- U.S. introduces new visa integrity fee
- United Airlines and Philippine Airlines continue to fly daily in August 2025 and are offering specials
- Marketing activities; etc.

DETAILS ARE FOUND IN THE APPENDIX

JAPAN



JAPAN AIRLINE INTELLIGENCE



AIRLINE OPERATION - AUGUST *As of August 4, 2025

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
UNITED AIRLINES	Available	UA 827	NRT	11:00/15:45	Daily	5,146
2,2/18.	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	UA 848	HND	23:35/ 4:25+1	Daily	5,146
	Available	UA 136	NGO	11:30 / 16:00	Mon, Tue, Thu, Fri, Sun	3,486
	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 4, 2025

Interviews with various companies

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
UNITED AIRLINES	Available	UA827	NRT	11:00/15:45	Daily	4,980
27018	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 4, 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
2/2/18	Available	UA 197	NRT	17:00/21:40	Daily	5,146
	Available	UA874	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



OSAKA HOSTS T'WAY GUAM CELEBRATION NIGHT

- July 17, 2025
- A joyful celebration was held at Senba Kitchen in Osaka to mark the return of T'way Air's Kansai-Guam route (last operated in 2020)
- A total of 50 guests attended the event included travel agents, media, T'way Air, and GVB
- GVB President Régine Biscoe Lee and Director of Global Marketing Nadine Leon Guerrero expressed excitement for renewed ties and upcoming promotions
- GVB highlighted the importance of this route in bringing more Japanese travelers to Guam and recognized the support of Ken Travel, Lotte Hotel, and Baldyga Group











GVB VISITS SISTER CITY AND JOINS GRAND PARADE

- July 26, 2025
- Sinajaña Mayor and GVB Board Director Robert Hofmann led a GVB delegation to Kashiwa City, a Guam sister city
- The visit coincided with the Kashiwa Citizens Festival
- Mayor Hofmann met with Kashiwa Mayor Kazumi Ota and members of the Kashiwa International Relations Association (KIRA) to discuss future exchanges
- Although virtual student exchanges resumed after the pandemic, both Japan and Guam expressed a strong desire to resume in-person visits and deepen ties through face-to-face interaction
- AMI CHUIDA



- GVB proudly joined the parade at the Kashiwa Citizens Festival, one of Japan's largest local events drawing over 700K visitors over two days
- The delegation featured Miss UOG, Ashley Topasña and a Guam cultural performance team, who paraded alongside a Japanese-CHamoru dance team
- The delegation showcased Guam's vibrant energy and brought the CHamoru culture to life along the streets near Kashiwa Station





GUAM WEDDING SPECIAL BECOMES HOT TOPIC

- August 3, 2025
- Sinajana Mayor and GVB Board Director Robert Hofmann led a GVB delegation to Kashiwa City, a Guam sister city
- The visit coincided with the Kashiwa Citizens Festival
- Mayor Hofmann met with Kashiwa Mayor Kazumi Ota and members of the Kashiwa International Relations Association (KIRA) to discuss future exchanges
- Although virtual student exchanges resumed after the pandemic, both Japan and Guam expressed a strong desire to resume in-person visits and deepen ties through face-to-face interaction







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:

- Tumon Night Market to be held every Sunday evening
- A hidden gem café opens in a small village
- A CHamoru fusion restaurant opens at the LeoPalace Resort Guam

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 AIRLINE INTELLIGENCE



AUGUST AIRLINE SCHEDULE *As of August 4, 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	10,478
Korean Air	KE423	DAILY	18:40	00:10+1	10,478
	KE8425*	DAILY	17:15	22:45	8,675
loiu Air	7C3101**	DAILY	10:40	16:05	4,914
Jeju Air	7C3107	DAILY	20:20	02:00+1	5,859
lim Ain	LJ913	DAILY	09:20	14:45	5,859
Jin Air	LJ917	DAILY	20:50	02:30+1	5,859
T'way Air	TW505	DAILY	09:00	14:30	5,859
		TOTAL			57,981

^{*}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	5,642
		TOTAL			11,501

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

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

KOREA AIRLINE INTELLIGENCE



SEPTEMBER AIRLINE SCHEDULE *As of August 4, 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	8,686
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			51 ,268

^{*7}C3107: Sep 8th – Sep 30th: Temporary suspension

· B U S A N - G U A M

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	5,460
		TOTAL			11,130

TOTAL OUTBOUND SEAT CAPACITY: 62,398 SEATS

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

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

KOREA AIRLINE INTELLIGENCE



OCTOBER AIRLINE SCHEDULE

*As of August 4, 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	10,478	
Korean Air	KE423	DAILY	18:40	00:10+1	8,450	
	KE8425	DAILY	17:15	22:45	7,117	
Jeju Air	7C3101*	DAILY	10:40	16:05	1,134	
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	4,725	
	TOTAL					

^{*7}C3101: Oct 26th – Oct 31st / Daily , **7C3107: Oct 2nd – Oct 11th / 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	4,550
		TOTAL			10,409

TOTAL OUTBOUND SEAT CAPACITY: 59,323 SEATS

^{***}LJ919: Oct 14th - Oct 31st / Daily

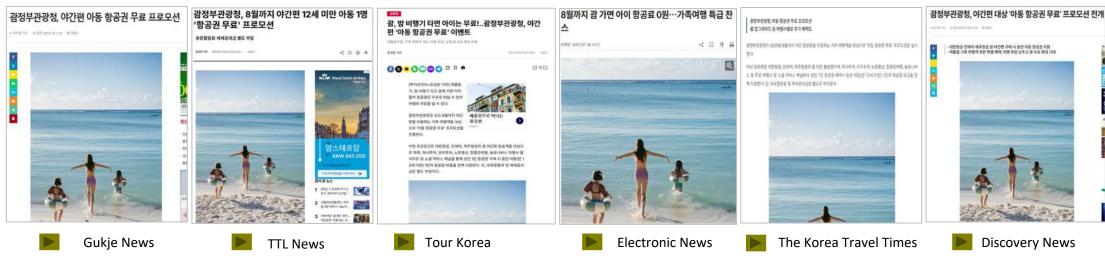
^{****}TW505: Oct 20th – Oct 25th : Temporary suspension, Oct 26th : Changed day flight to night flight

KOREA MARKET INTELLIGENCE



MEDIA COVERAGE

Guam Visitors Bureau Launches 'Kids Fly Free' Night Flight Promotion





Biz World

Biz Enter

Travel Leisure

Maeil Economy

Joongang Ilbo

News Road

무료"

Herald Economics

D 7 4 4

TAIWAN



TAIWAN AIRLINE INTELLIGENCE



UNITED

Operation Schedule: July *As of August 1, 2025

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

- United Airlines started the direct flight TPE-GUM service starting April 2nd.
- The limited-time promotion for TPE-GUM route has been extended from March 4 to September 26. The promotional fares are US\$304 (TWD 10,000, tax excluded). UA launched a new discounted economy K-class fare of US\$380. (TWD 12,500, tax excluded) for both B2B and B2C channels.

TAIWAN MARKET INTELLIGENCE





TAIWAN RECORDS A ROBUST 30% GROWTH FROM INDIA

Taiwan saw a 30.73% surge in Indian arrivals from January to May 2025, with 19,202 visitors compared to 14,688 during the same period in 2024. This follows a 20.81% growth in 2024, significantly outperforming India's overall outbound growth of 8.44%. Taiwan Tourism Administration (TTA) re-entered the Indian market in 2024 with a comprehensive development plan. Their efforts resulted in nearly 2.5 times higher growth than India's average outbound travel increase. Taiwan is promoting niche tourism such as golf experiences, targeting high net worth individuals and corporates.

TAIWAN'S NORTHERN CITIES TARGET SINGAPORE

Four Taiwanese cities launched the "Shiok You Around" promotional event in Singapore, showcasing natural beauty, local lifestyles, and cultural highlights. The word "shiok," familiar in Singapore and Malaysia was chosen to connect with regional audiences and promote themed itineraries and festivals. Over 70 professionals from Singapore and Malaysia attended the event. Taiwan's envoy highlighted attractions like Yangmingshan, Maokong, and Keelung as examples of Taiwan's diverse offerings. Officials emphasized preserving city identities while enhancing Taiwan's appeal through targeted promotions in the mature Singapore market.





COURTESY VISIT TO NEW CHIEF OF AIT AGRICULTURAL SECTION

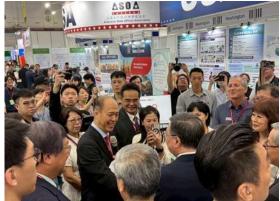
- July 23, 2025
- GTO met with Morgan Haas, the new Chief of AIT's Agricultural Section
- GTO shared Guam's interest in introducing high-tech agriculture and aquaculture to boost local development. The exchange helped identify potential areas for future cooperation.
- During the discussion, it was noted that 24 U.S. states currently have offices in Taiwan, with around 30% engaged in agricultural trade.



2025 BIOASIA OPENING CEREMONY

- July 24, 2025
- GTO attended the opening ceremony of BIO Asia 2025, an event co-hosted by BIO and the Taiwan Bio Industry Organization.
- Premier Cho Jung-tai delivered opening remarks highlighting Taiwan's biotech growth.
- During the opening ceremony tour, Premier Cho also visited the USA Pavilion, where GTO introduced key U.S. biotech strengths.
- The engagement enhanced the visibility of American biotechnology and opened the door for further international collaboration.







ACADEMIC FORUM ON AUSTRONESIAN STUDIES AND SEAFARING

- July 28, 2025
- GTO attended a forum which introduced CHamoru seafaring through both technical knowledge and spiritual insight.
- The event sparked lively exchanges, including academic discussions on canoe housing. The conversations highlighted Guam's strengths in seafaring and deepened local understanding of Austronesian navigation and its close ties to nature.





INDIGENOUS PEOPLES DAY CEREMONY AND MUSIC CONCERT

- July 31, 2025
- GTO attended the commendation ceremony and celebration music concert for Indigenous Peoples Day.
- The event commemorated the Indigenous identity recognition movement.
- Key guests, including Mr. Malaols, Chairperson for the Council of Indigenous Peoples, gathered to show solidarity and raise visibility of indigenous communities.





PHILIPPINES



PHILIPPINES AIRLINE INTELLIGENCE





Popular PAL Flights Deals to Guam!

MNL to GUM	ILO to GUM
Aug 13-15, 2025	Aug 12-19, 2025
From US \$410* Round-trip Economy	From US \$473* 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 \$353*	From US \$323*	From US \$323*
Round Trip Economy	Round Trip Economy	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



U.S. EMBASSY SHIFTS VISA COURIER SERVICES TO 2GO EXPRESS

Effective August 1, 2025, 2Go Express replaces LBC as the official courier partner of the U.S. Embassy in the Philippines for visa-related document submission and delivery. Visa applicants may opt for Premium Drop-off/Pick-up services at select 2Go branches nationwide for PHP600. However, document handling at the Embassy's offsite Visa Application Center in Parqal Mall, Parañaque City remains free of charge. For assistance during the transition, applicants are advised to contact the Consular Section.





PHILIPPINE PASSPORT RISES TO #72 IN GLOBAL POWER RANKINGS

The Philippines climbed to #72 out of 199 countries in the 2025 Henley Passport Index, sharing the spot with Mongolia and Sierra Leone. Filipino passport holders now enjoy visa-free or visa-on-arrival access to 65 destinations – an improvement from previous years, where the country ranked 83rd in 2021 and 73rd in 2024. Despite the upward trend, the passport still grants access to fewer than half of the 227 destinations tracked by the index.

PHILIPPINES MARKETING ACTIVITIES



MONTHLY TRAVEL TRADE EDM

- GVB's latest newsletters highlighted Guam's unique cuisine, upcoming events, and Guam as a nearby pilgrimage destination
- Sent to a total of 1,637 contacts in the Philippines
- Keeps Guam top of mind among travel trade industry
- Provides real-time updates for agents to create Guam travel packages



SALES MEETING WITH CITTI ELITE

- August 4, 2025
- GVB met with Citti Elite a luxury travel agency based in the Philippines
- Discussed partnerships for an upcoming cruise scheduled for March 2026 via Ponant Explorations
- The cruise will depart from Guam to Osaka
- GVB aims to partner with Citti Elite to create a 2D1N itinerary in Guam for Filipino cruise passengers





APPENDIX

As of August 8, 2025 and may be subject to change.

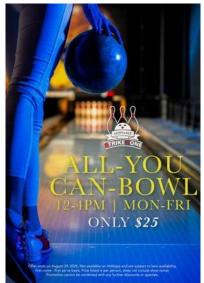


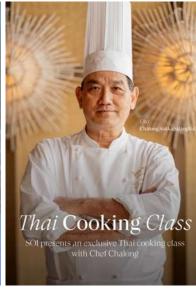
DESTINATION UPDATES



GUAM EVENTS - AUGUST & BEYOND



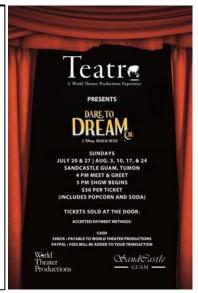


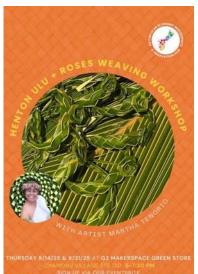






















For more info, visit our website or click here.

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.

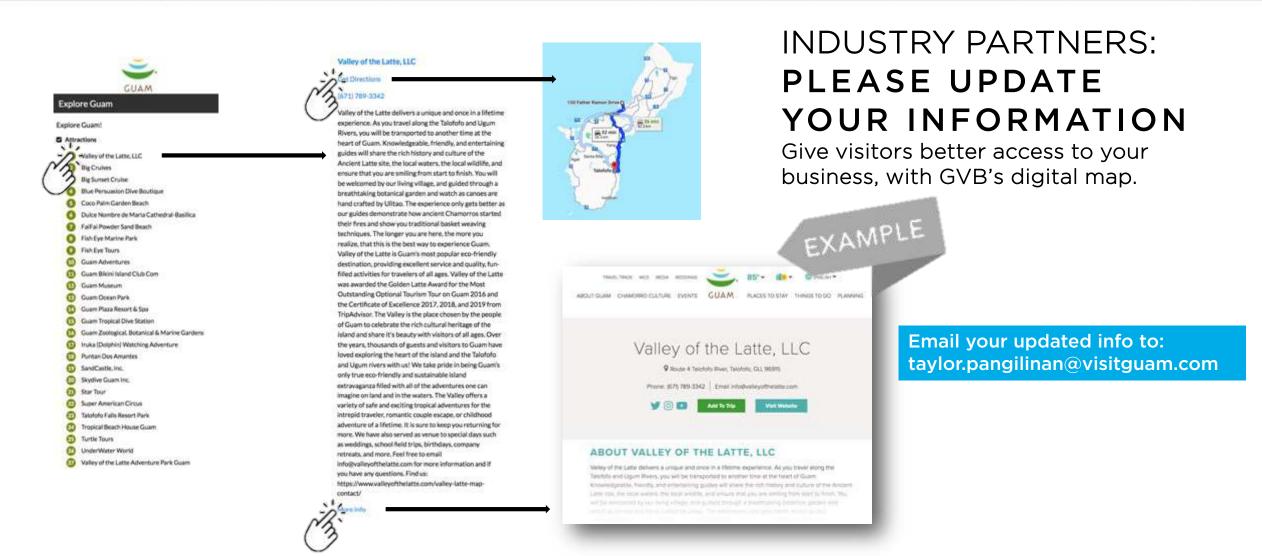
Access the Guam EDF from our GVB website or the Guam CQA website.

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

as of 08 August 2025

EXPLORE GUAM - MAP





as of 08 August 2025

MEMBERSHIP BENEFIT



CALLOUT FOR BROCHURES

GVB will display and distribute your company brochures to visitors at the Bureau's front office and concierge service desks located at the Guam International Airport and the Guam Premium Outlets.

If interested, please provide at least 500 brochures (each language).

Download our membership application from our GVB website.



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