

### **INDUSTRY REPORT**

JUNE 27, 2025



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# GUAM ARRIVALS



### MAY 2025



May 1-26, 2025 Total: 42,121 (42.2%)

% Market Mix	Origin	2019	2024	2025	% of 2019
45.9%	Korea	49,051	23,844	19,345	39.4%
31.5%	Japan	35,534	10,636	13,268	37.3%
11.9%	US/Hawaii	5,892	4,976	5,004	84.9%
2.7%	Philippines	1,944	813	1,133	58.3%
1.4%	Taiwan	2,088	104	580	27.8%
0.6%	China	483	268	240	49.7%
0.1%	Hong Kong	473	45	61	12.9%

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

Note: May 2025 Daily Arrivals reflect Civilian Air arrivals only

### CALENDAR YEAR TO DATE 2025



January - May 26, 2025

% Market Mix	Origin	2019	2024	2025	% of 2019
45.2%	Korea	286,023	174,095	127,240	44.5%
35.0%	Japan	273,028	84,108	98,650	36.1%
10.8%	US/Hawaii	38,874	35,750	30,264	77.9%
2.1%	Philippines	8,300	5,142	5,828	70.2%
1.1%	Taiwan	11,321	1,449	3,178	28.1%
0.7%	China	5,828	2,109	1,927	33.1%
0.1%	Hong Kong	2,681	260	306	11.4%

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

Note: May 2025 Daily Arrivals reflect Civilian Air arrivals only

Total: 281,499 (43.2%)

### FISCAL YEAR TO DATE 2025



### October 2024 - May 26, 2025

% Market Mix	Origin	2019	2024	2025	% of 2019
46.5%	Korea	468,090	277,215	212,038	45.3%
33.8%	Japan	433,811	134,681	154,307	35.6%
10.6%	US/Hawaii	61,472	55,772	48,495	78.9%
2.1%	Philippines	14,703	8,790	9,785	66.6%
1.0%	Taiwan	17,609	1,970	4,382	24.9%
0.6%	China	9,170	3,037	2,909	31.7%
0.1%	Hong Kong	4,709	499	470	10.0%

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

Note: May 2025 Daily Arrivals reflect Civilian Air arrivals only

Total: 456,350 (43.4%)



### MARKET INTELLIGENCE REPORT

As of June 27, 2025 and may be subject to change.



# MARKETS AT-A-GLANCE



### MARKETS AT-A-GLANCE



### JAPAN

- Total outbound seat capacity for June remains at 36,016; July at 36,039; and August at 41,078.
- Marketing intelligence, marketing activities, and Weekly Guam digital PR articles

### SOUTH KOREA

- Middle East tensions raise alarms in travel industry ahead of summer peak
- Total outbound seat capacity for June remains at 39,180; July at 50,629; and August at 58,161.
- Media monitoring of press releases; and SNS weekly activity

### DETAILS ARE FOUND IN THE APPENDIX

### TAIWAN

- Taiwan travelers get free waiver for China travel permits
- Taoyuan airport expects travel numbers to beat 2019
- · Marketing activities; media monitoring; etc.

### PHILIPPINES

- Philippines announces digital nomad visa
- US Embassy to nonimmigrant visa applicants: set socmed accounts to public
- United Airlines and Philippine Airlines continue to fly daily in June 2025 and are offering specials
- · Marketing activities; etc.

# JAPAN



### JAPAN AIRLINE INTELLIGENCE



### AIRLINE OPERATION - JUNE \*As of June 23, 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
4,7678	Available	UA 197	NRT	17:00/21:45	Daily	4,980
	Available	UA865	NRT	17:25/22:10	Mon, Fri,	1,494
	Available from March 1 to July 10, 2025	UA841	NRT	17:55/ 22:40	Daily	4,980
	Available	UA848	HND	23:55/ 4:45+1	Daily	4,980
	Available	UA 136	NGO	11:40 / 16:15	Mon, Tue, Thu, Fri, Sun	3,652
	Available	UA 150	KIX	11:00/15:45	Daily	4,980
					TTL	30,046

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
JAL	Available	JL941	NRT	9:30 / 14:15	Daily	5,970
					TTL	5,970

### JAPAN AIRLINE INTELLIGENCE



### AIRLINE OPERATION - JULY \*As of June 23, 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
2,0,10	Available	UA 197	NRT	17:00/21:45	Daily	5,146
	Available	UA 865	NRT	17:25/22:10	Mon, Fri,	1,328
	Available from March 1 to July 10, 2025	UA841	NRT	17:55/ 22:40	Daily	1,660
	Available	UA 848	HND	23:55/ 4:45+1	Daily	5,146
	Available	UA 136	NGO	11:40/16:15	Mon, Tue, Thu, Fri, Sun	3,652
	Available	UA 150	KIX	11:00/15:45	Daily	5,146
					TTL	27,224

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
<b>Q</b> 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	2,646
					TTL	8,815

### JAPAN AIRLINE INTELLIGENCE



### AIRLINE OPERATION - AUGUST \*As of June 23, 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
2,011	Available	UA 197	NRT	17:00/21:45	Daily	5,146
	Available from August 1to 30, 2025	UA874	NRT	21:20 / 2:0 5+1	Mon, Wed, Fri, Sat	3,320
	Available	UA865	NRT	17:25/ 22:10	Mon, Fri,	1,660
	Available from May 1, 2024	UA848	HND	23:55/4:45+1	Daily	5,146
	Available	UA 136	NGO	11:40/16:15	Mon, Tue, Thu, Fri, Sun	3,486
	Available	UA 150	KIX	11:00/15:45	Daily	5,146
					TTL	29,050

AIRLINES	CURRENT STATUS	FLIGHT	DEPARTURE	TIME	FREQUENCY	SEAT CAPACITY
<b>W</b> 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



## GUAM-FILMED PRODUCTION TO AIR NATIONWIDE IN JAPAN ON JULY 1

- With full support from the Guam Visitors Bureau, TV Tokyo's latest production "The Reason I'm with You" is scheduled to air nationwide in Japan on July 1, 2025
- The story follows three couples in their 20s, 30s, and 50s as they spend one life-changing week in Guam
- Filmed entirely in Guam, the story highlights the island's warmth and beauty in a new light for Japanese viewers
- Post-broadcast efforts will include special features on filming locations, themed tours, and viewer campaigns



### 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:

- Popular Coffee Slut opens in Tumon
- Seafood with a Bold Heart: Now at Crab Daddy Tumon
- Parents and children enjoy Guam! Kids' programs at hotels

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.

















プードボウス さのスタマウ この前日第的名字ブルタ級銀は子供から人人及で参手になれるメニューです。特別ソースを (Compose) が、 より他やたカニウスでも要性に現現れば、誰もが実際になれるはず!果珠しさだけでなくま はも情報させてくれること形滅いなしです。 たったった。(他

ベビーオクトバス、クローフィッシュ(物) ドを3つ返放できます。ボタテ、むきエビは温かできる。3人所はどの繋があるコンポのや、ロブ スターやキングウラブといった要乗なシーフードを選べるコンポでもあり、人数や好みに合わせ でからまでシーフードを提出できます。

# SOUTH KOREA



### KOREA MARKET INTELLIGENCE



# MIDDLE EAST TENSIONS RAISE ALARMS IN TRAVEL INDUSTRY AHEAD OF SUMMER PEAK



Rising tensions between Israel and Iran are causing market disruptions ahead of Korea's summer travel peak, heightening concerns over fuel prices, currency fluctuations, and consumer demand.

Since June 13, 2025, escalating conflict between the two nations has driven up oil prices, weakened the Korean won, and led to declines in travel and airline stocks. While the immediate impact is contained, a prolonged or intensified situation could increase travel costs and discourage bookings during the critical summer season.

### KOREA AIRLINE INTELLIGENCE



### JUNE AIRLINE SCHEDULE \*As of June 23, 2025

•INCHEON - GUAM

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
Kayan Air	KE421	DAILY	09:45	15:15	10,140	
Korean Air	KE423	DAILY	18:40	00:00+1	10,140	
Jeju Air	7C3101	DAILY	10:40	16:05	5,670	
Jin Air	LJ913	DAILY	09:20	14:45	5,670	
T'way Air	TW505*	DAILY	09:00	14:30	3,780	
	TOTAL					

<sup>\*</sup>TW505: Jun 21st – Jul 18th: Temporary suspension

### • BUSAN - GUAM

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jin Air	LJ921*	4/W & Daily	21:00	02:00+1	3,780
		TOTAL			3,780

\*LJ921: May 2<sup>nd</sup> – Jun 21<sup>st</sup>: 4/W (Mon, Wed, Fri, Sat) Jun 23<sup>rd</sup> – Oct 25<sup>th</sup>: Daily

### KOREA AIRLINE INTELLIGENCE



### JULY AIRLINE SCHEDULE \*As of June 23, 2025

•INCHEON - GUAM

\*Airline schedule is flexible, subject to change.

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity	
Korean Air	KE421	DAILY	09:45	15:15	10,478	
Korean Air	KE423	DAILY	18:40	00:00+1	10,478	
Iniv. Air	7C3101	DAILY	10:40	16:05	5,859	
Jeju Air	7C3107*	DAILY	20:20	02:00+1	3,780	
lin Air	LJ913	DAILY	09:20	14:45	5,859	
Jin Air	LJ917**	DAILY	19:30	01:00+1	5,859	
T'way Air	TW505***	DAILY	09:00	14:30	2,457	
	TOTAL					

<sup>\*7</sup>C3107: Jul 12<sup>th</sup> - Sep 30<sup>th</sup> Daily

· BUSAN - GUAM

Airlines	Flight No.	Days	DEP Time	ARR Time	Seat Capacity
Jin Air	LJ921	4/W & Daily	21:00	02:00+1	5,859
TOTAL					5,859

<sup>\*\*</sup>LJ917: Jul  $1^{st}$  – Sep  $30^{th}$ : Daily

<sup>\*\*</sup>TW505: Jun 21st – Jul 18th: Temporary suspension

### KOREA AIRLINE INTELLIGENCE



### AUGUST AIRLINE SCHEDULE \*As of June 23, 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
Lain Ain	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
	LJ917	DAILY	19:40/20:05/19:35	01:20/02:30/01:15+1	5,859
T'way Air	TW505**	DAILY	09:00	14:30	3,213
TOTAL				46,660	

<sup>\*7</sup>C3101: Aug 27<sup>th</sup> – Oct 25<sup>th</sup>: 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	02:10/02:20/02:25+1	5,642
TOTAL					11,501

<sup>\*</sup>KE2259: Aug 1<sup>st</sup> – Oct 25<sup>th</sup>: Daily

<sup>\*\*</sup>TW505: Aug 17<sup>th</sup> – Sep 28<sup>th</sup>: Temporary suspension

### KOREA MARKETING ACTIVITIES



### PR/MARKETING EFFORT

Guam Visitors Bureau accomplished Hanwha Eagles Guam Day







Joongang Ilbo



**News Journalism** 



News Road



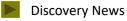














### KOREA MARKETING ACTIVITIES



### PR/MARKETING EFFORT

Guam Visitors Bureau highlights island's appeal at the 40th Seoul International Travel Fair





Biz World



Open News Agency



**Discovery News** 



Joongang Ilbo

### KOREA MARKETING ACTIVITIES



### PR/MARKETING EFFORT

Guam Visitors Bureau announces expansion of night flight routes to Guam





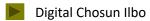






**Gukje News** 





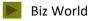




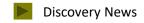














# TAIWAN



### TAIWAN AIRLINE INTELLIGENCE



### Operation Schedule: June \*As of June 27, 2025



Flight	Departure (local time)	Arrival (local time)	Frequency
TPE-GUM	10:30 a.m	4:20 p.m	Every Wednesday
UA 0166	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 TRAVELERS GET FREE WAIVER FOR CHINA

China will waive application fees for first-time Taiwanese applicants of the Mainland Travel Permit from July 1 to December 31, 2025, aiming to boost cross-strait travel and people-to-people exchanges. The policy, led by China's Taiwan Affairs Office and other central agencies, removes fees of NT\$1,500-2,400, though optional home delivery charges (NT\$50-200) will still apply during the waiver period. Analysts interpret the move as a strategic effort to deepen grassroots ties and encourage greater travel, business, and cultural interaction between Taiwan and China during the six-month initiative.

### TAOYUAN AIRPORT EXPECTS TRAVEL NUMBERS TO BEAT 2019

Passenger traffic at Taiwan Taoyuan International Airport is nearing pre-pandemic levels, with over 20 million travelers recorded by June 4, and 2024 figures expected to surpass 2019 due to travel recovery and long weekends. July and August passenger volume is projected to rise 9.5% year-on-year, influenced by factors like economic shifts, exchange rates, travel habits, and global politics, including airspace changes due to Middle East tensions.



### TAIWAN MARKETING ACTIVITIES



# ATO'S FOOD TAIPEI U.S.A. PAVILION WELCOME RECEPTION

- June 25, 2025
- ATO Taipei hosted a reception at the Taipei World Trade Center to welcome all US exhibitors
- Local industry players including importers, wholesalers, and retailers were invited to attend
- As one of the exhibitors at the Food Taiepi USA Pavilion, GVB sponsored Made in Guam chocolates, which were beautifully presented on a display table showcasing Guam's products





### FOOD TAIPEI 2025 GUAM BOOTH

- June 25-28, 2025
- As a member of ASOA and support from MoFA, GVB participated in the Food Taipei 2025 trade show under the USA Pavilion
- GVB distributed samples of Made in Guam chocolates to attendees inviting them to visit the Guam booth
- As a result of the event, GVB received an increase in social media following



# PHILIPPINES



### PHILIPPINES AIRLINE INTELLIGENCE





### Popular PAL Flights Deals to Guam!

CEB to GUM	MNL to GUM	MNL to GUM
Jul 02-07, 2025	Jul 14-23, 2025	Aug 18-25, 2025
From US \$515*	From US \$363*	From US \$363*
Round-trip  Economy	Round-trip  Economy	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

Jun 2025	Jul 2025	Aug 2025
From US \$409*	From US \$349*	From US \$294*
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	Deily	MNL 22:30	GUM 04:30 <sup>+1</sup>
Terminal 1	PR111	Daily	GUM 06:00	MNL 07:55
	UA184	Daily	MNL 22:25	GUM 04:20 <sup>+1</sup>
	UA183		GUM 19:55	MNL 21:50
United Airlines Terminal 3	UA192 via Koror	T /F.:	MNL 22:40	GUM 06:30
	UA193 via Koror	Tues/Fri	GUM 19:55	MNL 23:50

### PHILIPPINES MARKET INTELLIGENCE



### PHILIPPINES ANNOUNCES DIGITAL NOMAD VISA

The Philippines is preparing to launch its official Digital Nomad Visa in June 2025, offering foreign remote workers the opportunity to reside in the country while working for employers or clients based abroad. This move aligns the Philippines with a broader global trend toward flexible, remote work and positions the country alongside other Southeast Asian economies that are actively attracting mobile professionals with tailored visa schemes. Valid for 12 months and renewable for an additional 12 months, the Digital Nomad Visa allows for a total two-year stay. Applications are expected to open in June 2025.





## U.S. EMBASSY TO NONIMMIGRANT VISA APPLICANTS: SET SOCMED ACCOUNTS TO PUBLIC

The U.S. Embassy in the Philippines announced that all non-immigrant visa applicants are now required to set their social media accounts to public. The Embassy advised that this request applies to all individuals applying for an F, M, or J nonimmigrant visa. These types of visas are all used by individuals coming to the US for educational or cultural exchange purposes. Both F and M visas are for students, while exchange visitors use J visas. According to the Embassy, this request is to facilitate vetting necessary to establish their identity and admissibility to the United States.

### PHILIPPINES MARKETING ACTIVITIES



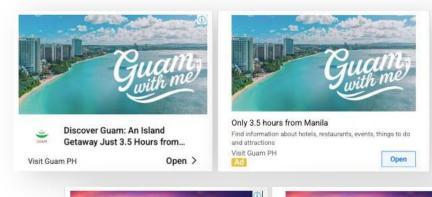
### MANILA BULLETIN COLLABORATION

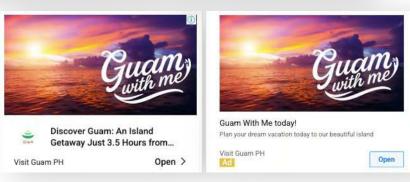
- GVB continues its partnership with Manila Bulletin for the month of June
- During its first week, the artcard organically reached
  340k people and received over 6k engagements across both main and lifestyle FB pages



### **#GUAMWITHME GOOGLE ADS LAUNCH**

- Following the carousel posting on FB/IG, GVB also launched banner ads to further promote its #GuamWithMe campaign
- Banner ad placement includes display, search, location and YouTube.
- Objective is to direct users to the visitguam.ph website





### PHILIPPINES MARKETING ACTIVITIES



### **GVB MONTHLY TRADE NEWSLETTER**

- GVB's second newsletter for the month of June provided Philippine travel agents with a one-stop information hub for all things Guam
- Promoted the addition of a sales kit catered to Philippine travel agents on the visitguam.ph travel trade page



### UNITED AIRLINES NEWSLETTER

- In collaboration with GVB, United Airlines distributed a newsletter to their trade contacts within the Philippines
- Newsletter highlighted United Airlines' flight schedules to Guam from Manila (direct) and Cebu (via Narita)
- Encouraged Philippine travel agents to create Guam packages and directs them to the visitguam.ph website





### **APPENDIX**

As of June 27, 2025 and may be subject to change.



# DESTINATION UPDATES



### **GUAM EVENTS - JUNE & JULY**





















For more info, visit our website or click <u>here.</u>

### **GUAM EVENTS CONTINUED**



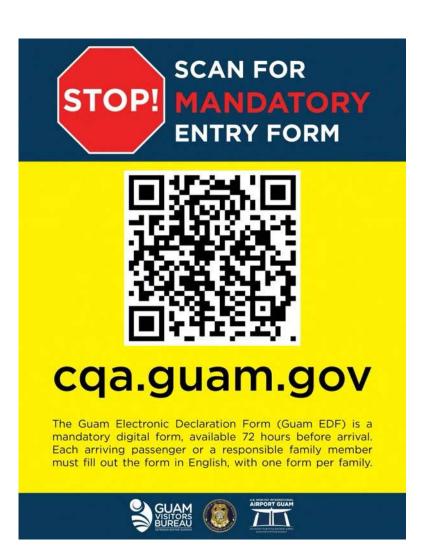




For more info, visit our website or click here.

### **GUAM EDF**





# 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 27 June 2025

### **EXPLORE GUAM - MAP**





as of 27 June 2025

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### 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/