



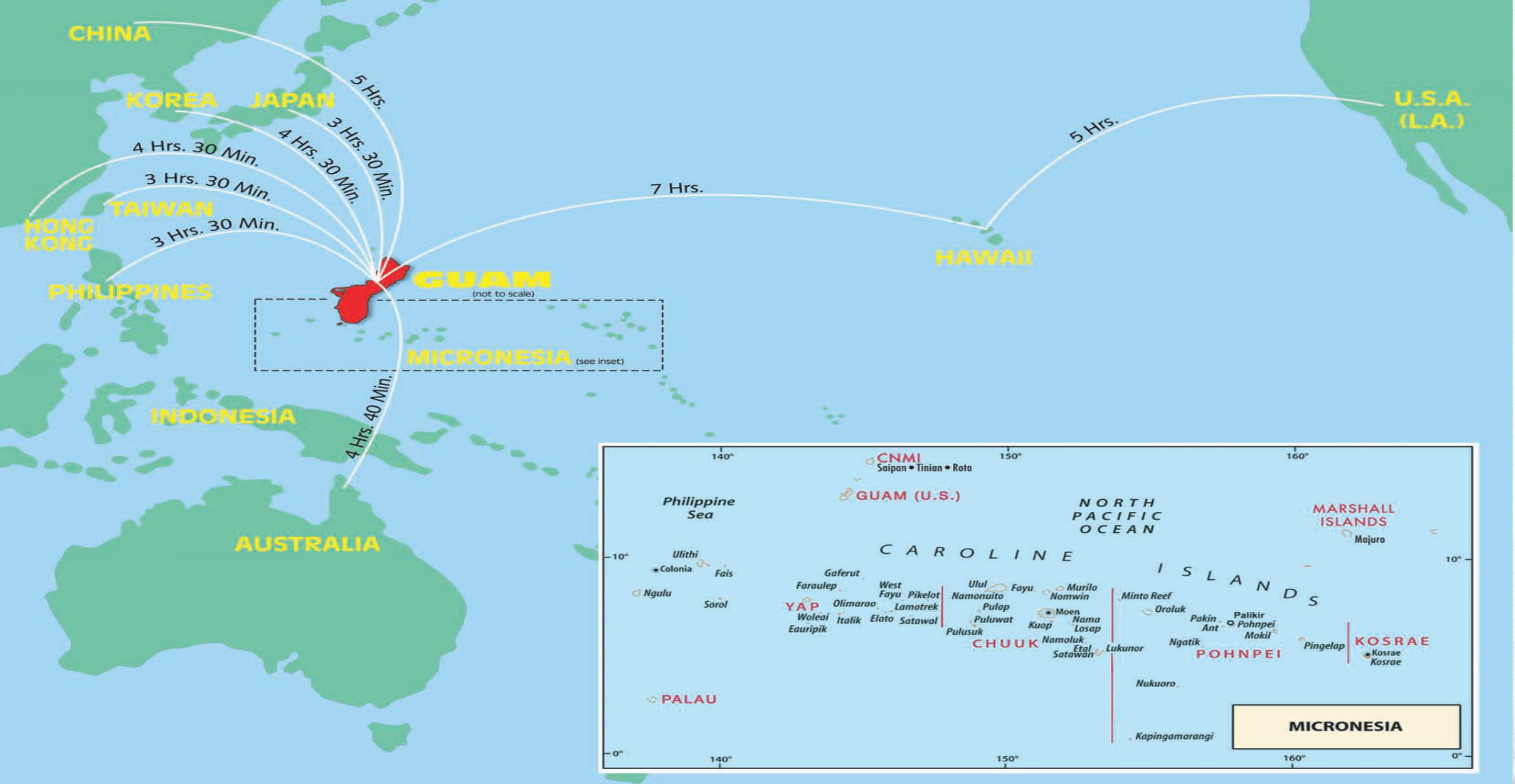
A.B. Won Pat International Airport Guam, USA

February 2024



WELCOME BACK TO GUAM





AIRLINES:



CONTINUED
SUSPENSION:



EXCITING Guam!

Brand Name & Discount Shopping!



Cultural Shows & Festivals!



Eat and Discover a World of Delicious Food!



Chill on the Best Beaches and Warm Shores!



Water Adventures & Sports!



Fishing & Dolphin Watching!





ACCOMODATIONS

35 HOTELS

9,584 hotel rooms

PREMIER HOTELS

- The Tsubaki Tower
- Dusit Thani Guam Resort
 - *Grand Ballroom is the largest MICE facility (1155 sq m) accommodate 1,000 pax*
- Hilton Guam Resort & Spa
- Hyatt Regency Guam
- Lotte Hotel

BNB

Located throughout the island



OUR HISTORY & PEOPLE

HISTORICAL TIMELINE

- 1521 A.D. Ancient Prehistorical Era
- 1565 Ferdinand Magellan “discovers” Guam
- 1565 – 1898 Spanish Era
- 1898 – 1941 U.S. Naval Colonization Era
- 1941 – 1944 Japanese Occupation Era
- 1944 – 1950 Post-WWII Era
- 1950 – present Contemporary Era (Organic Act of Guam signed in 1950)

ABOUT OUR PEOPLE

People born in Guam are **U.S. citizens**
Official languages: **Chamoru & English**

Population: 154,000

- 37% CHamoru
- 26% Filipino
- 7% Caucasian

Remaining is comprised of Asians, other Pacific Islanders, and other ethnicities

*Population Source: 2020 U.S. Census Bureau
Demographics Source: U.S. Department of Health and Human Services*



Air Service Incentives

Destination Based: All unserved and under-served city destinations in the Asia-Pacific region for direct scheduled air service or scheduled on-demand air service to Guam.

Air Carriers: The incentive is open to all U.S. and foreign-based airlines that possess all governmental authorizations. Tour wholesalers and agencies are ineligible to receive the GIAA incentive but may factor such incentive in their negotiations with an airline operator.

Incentive Duration: Up to a maximum of two (2) years for an unserved destination per air carrier.

Minimum Weekly Frequency: GIAA incentive applies to new air service with a minimum of one (1) flight per week.

Rates & Charges Discount: The GIAA incentive applies to operational rates and charges published in the Airport Tariff Schedule in effect at the time of inaugural service and limited to the Airfield Use (Landing) Fee, Loading Bridge Use, Immigration Inspection, Arrivals and Departure Fees only.

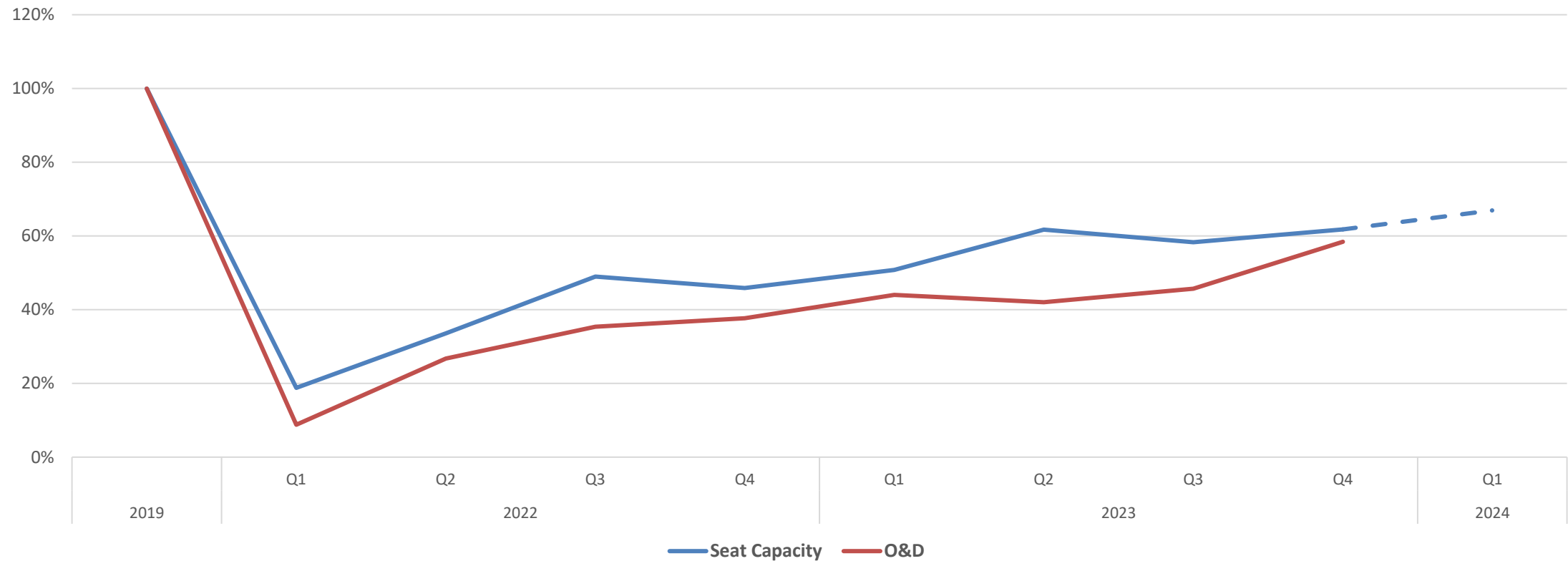
- The cumulative percentage discount of up to 50% for the first year of operations is applicable to the operational rates and factors including but are not limited to aircraft capacity, non-peak operational schedule and load factors.
- For air carriers that are eligible to execute an agreement for up to two (2) years, the cumulative discount for the first year is up to 50% and may be eligible for additional discounts of up to 75% for the second year of operations.
- For existing GIAA signatory airlines, incentives for existing routes may be provided on a case-by-case basis and discounts of up to 50% may be applicable subject to negotiations.
- Additional incentives may be provided based on a case-by-case basis subject to review by the Federal Aviation Administration to include marketing support, fuel flowage fees, and terminal rents.
- The incentive will be applied on a monthly basis pursuant to the airline activity report for the prior month with the exception of load factors, which will be computed on an annual basis.

GUAM MARKET ON RECOVERY



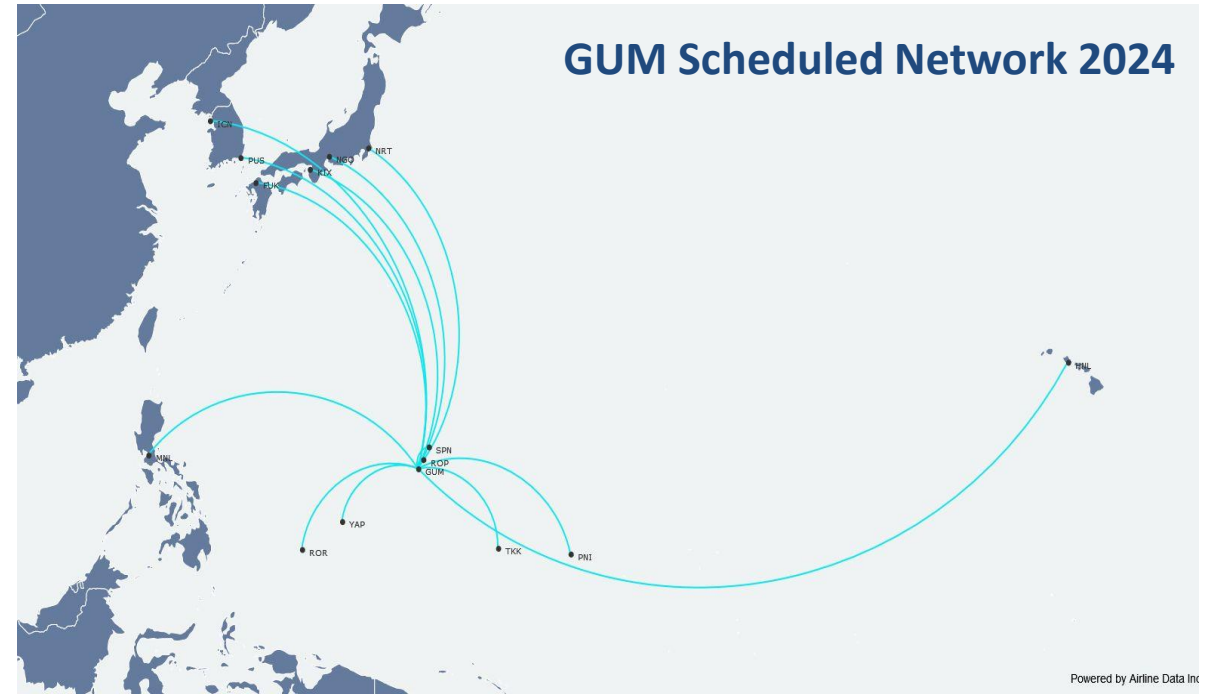
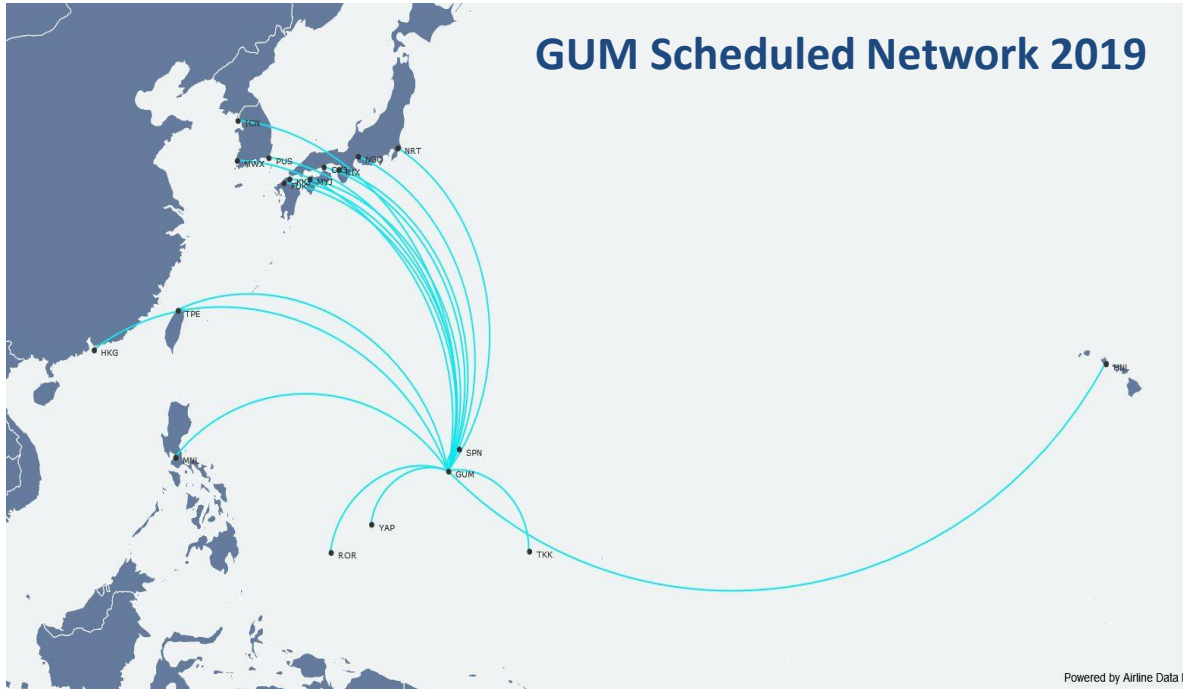
Market Recovery Status

Guam Market Seat Capacity & O&D Recovery



2023 OD Passenger traffic almost 50% of 2019, Seat Capacity 58% of 2019. 2024 Q1 Seat Capacity recovery to almost 70% of same period 2019.

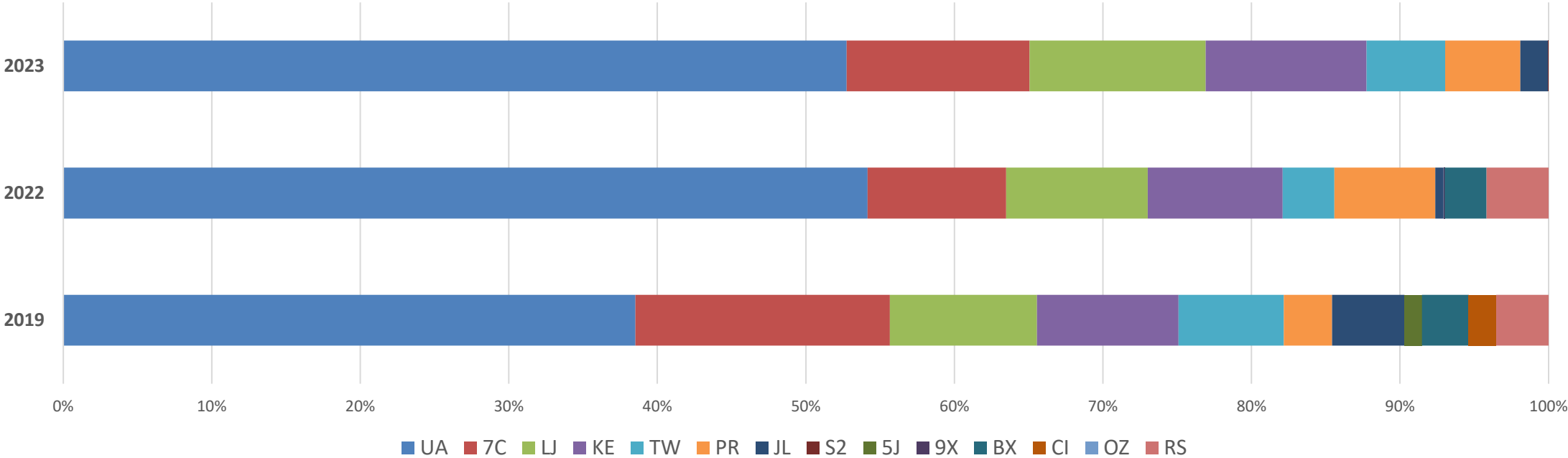
Guam Market Network Recovery



2019	2023	2024 Q1	% Change 2019 vs 2023
11 Passenger Airlines	8 Passenger Airlines	9 Passenger Airlines	73%
3 cargo operators	3 Cargo Operators	3 Cargo Operators	100%
18 Direct Destinations	14 Direct Destinations	14 Direct Destinations	78%
1,127 Monthly Flights	774 Monthly Flights	764 Monthly Flights	62%

Airline Market Share on Guam

Guam Airline Market Share by Capacity Seats

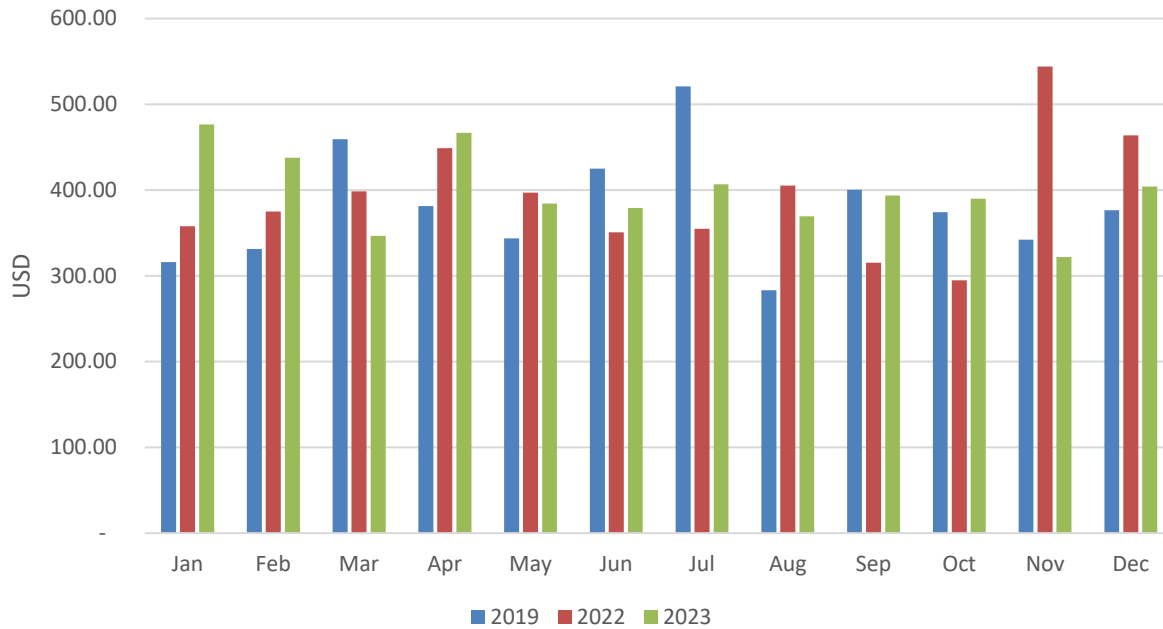


2019	2023	2024 Q1	% Change 2019 vs 2023
11 Passenger Airlines	8 Passenger Airlines	9 Passenger Airlines	73%
3 cargo operators	3 Cargo Operators	3 Cargo Operators	100%
18 Direct Destinations	14 Direct Destinations	14 Direct Destinations	78%
1,127 Monthly Flights	774 Monthly Flights	764 Monthly Flights	62%

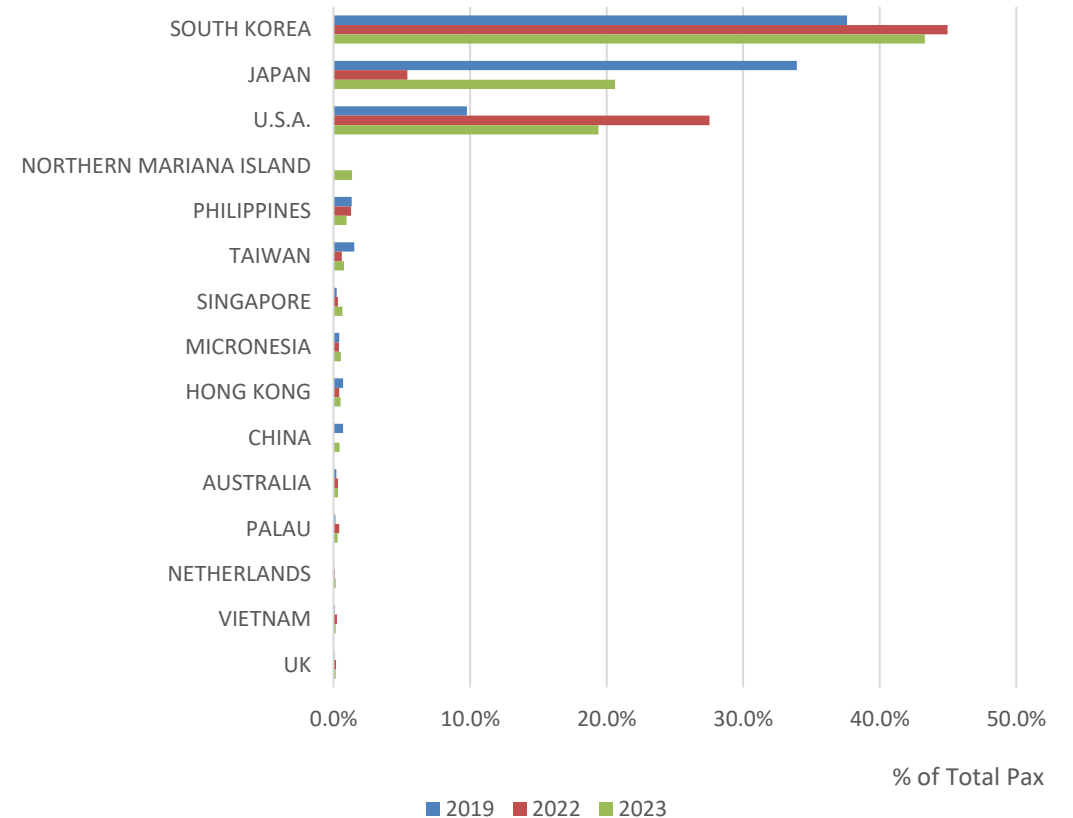
Source: Sabre MI, GIAA Operation Data

Average Fare & Top Source Market

Guam Monthly Average Fare



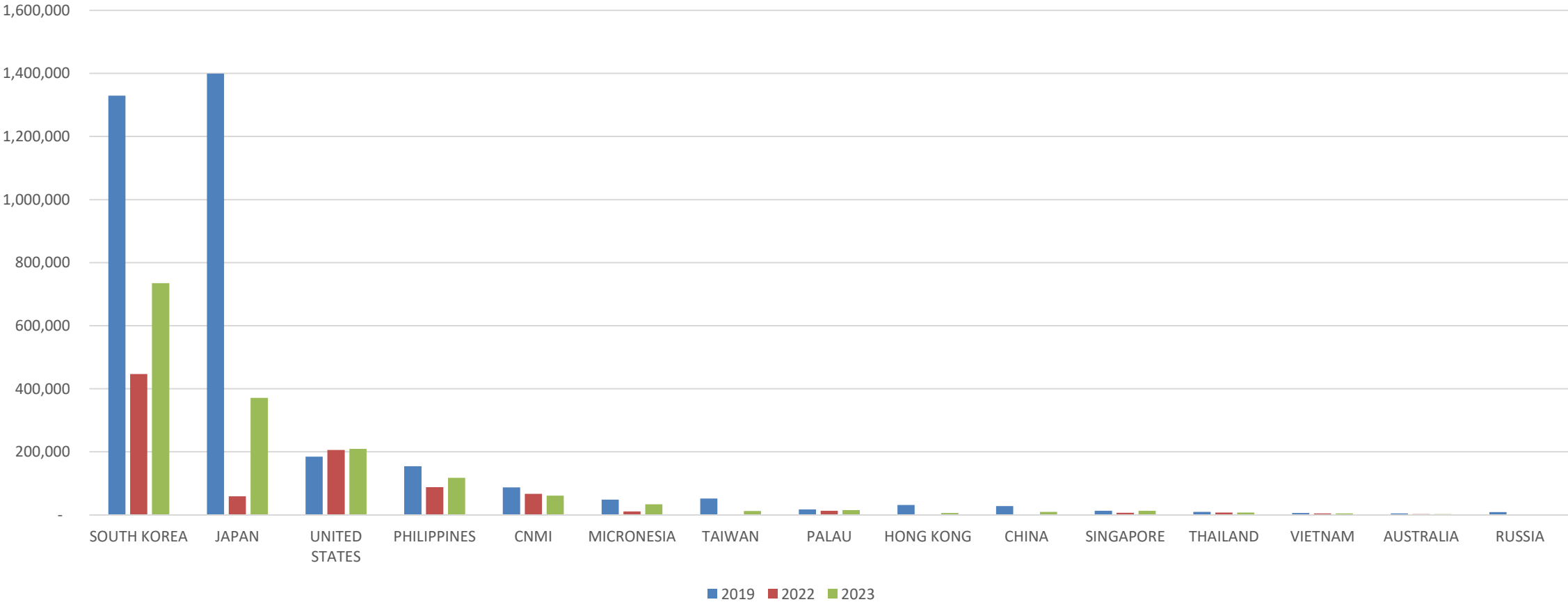
Guam Top 15 Passenger Source Market by POS



- Average Fare 2019 was \$382.68USD, \$395.24USD in 2022 and \$398.90USD in 2023
- South Korea, Japan and US Mainland are top 3 passenger source market by point of sales in 2023

TOP O&D Market of Guam

Top 15 O&D Country Markets of Guam



Our Flight Network

(Passenger & Cargo)

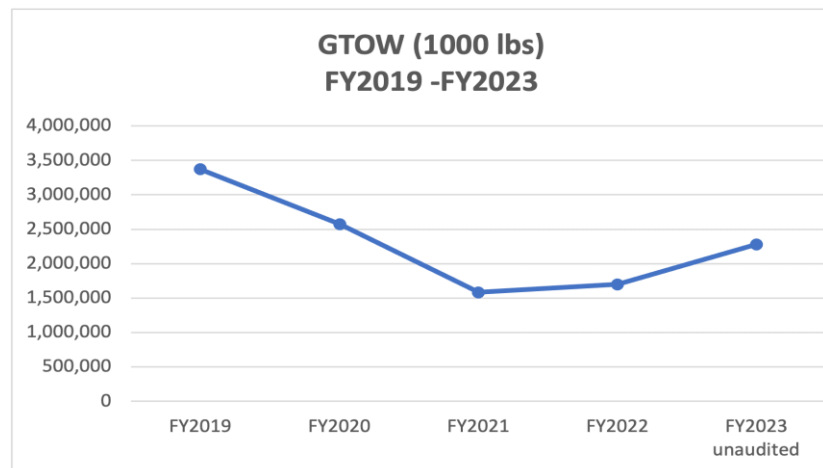
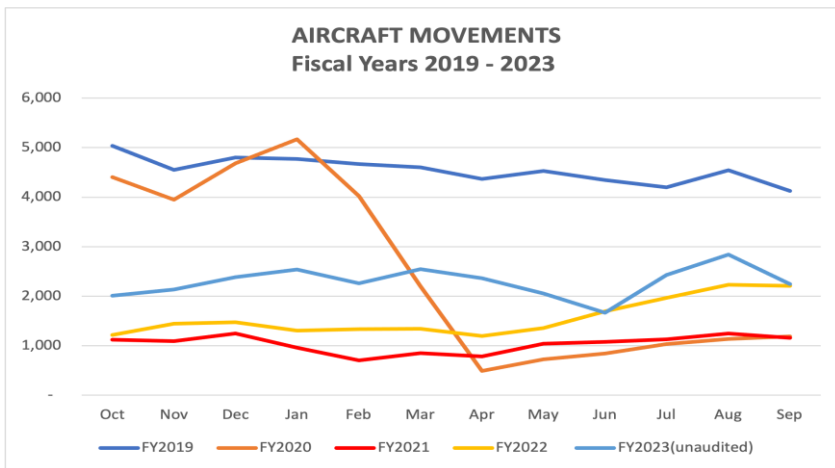
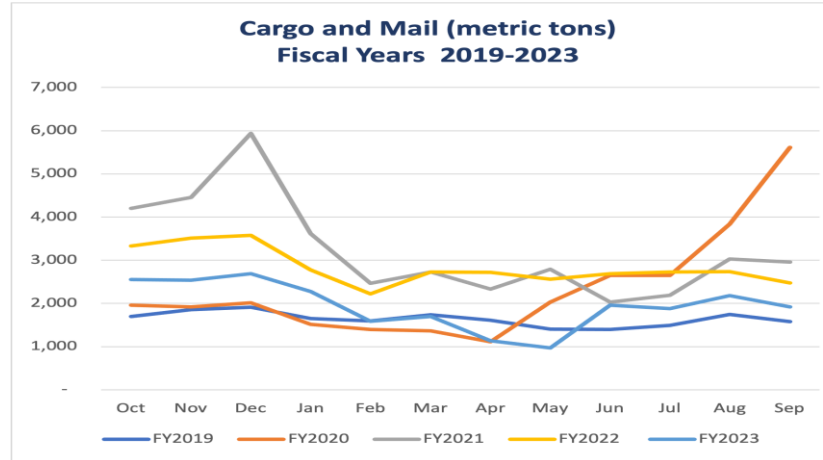
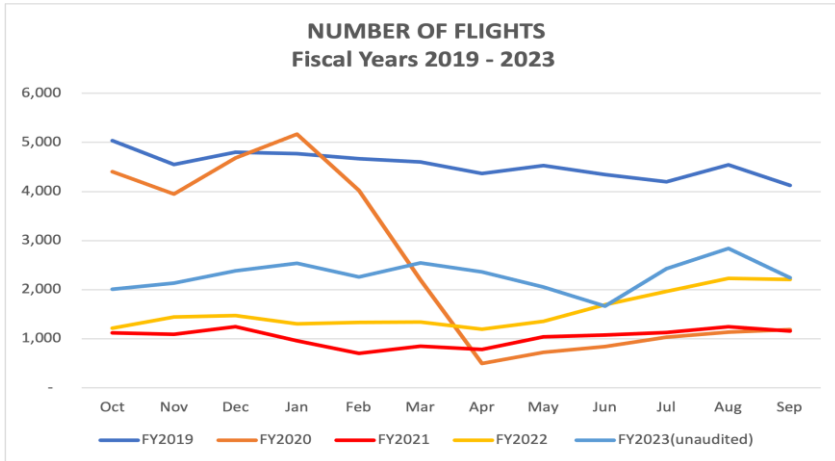


3-4 hours away from major Asian cities:

- Tokyo
- Osaka
- Seoul
- Pusan
- Taipei
- Manila

2019	2023	2024 Q1	% Change 2019 vs 2023
11 Passenger Airlines	8 Passenger Airlines	9 Passenger Airlines	73%
3 cargo operators	3 Cargo Operators	3 Cargo Operators	100%
18 Direct Destinations	14 Direct Destinations	14 Direct Destinations	78%
1,127 Monthly Flights	774 Monthly Flights	764 Monthly Flights	62%

Airport Overview: Operations



→ Pre-pandemic airport operations

→ Almost 3.8 million passenger movements per year. Over 1.7 million arrivals, over 1.7 million departures, and over 327 thousand arriving/departing transit passengers

→ Almost 55,000 aircraft operations

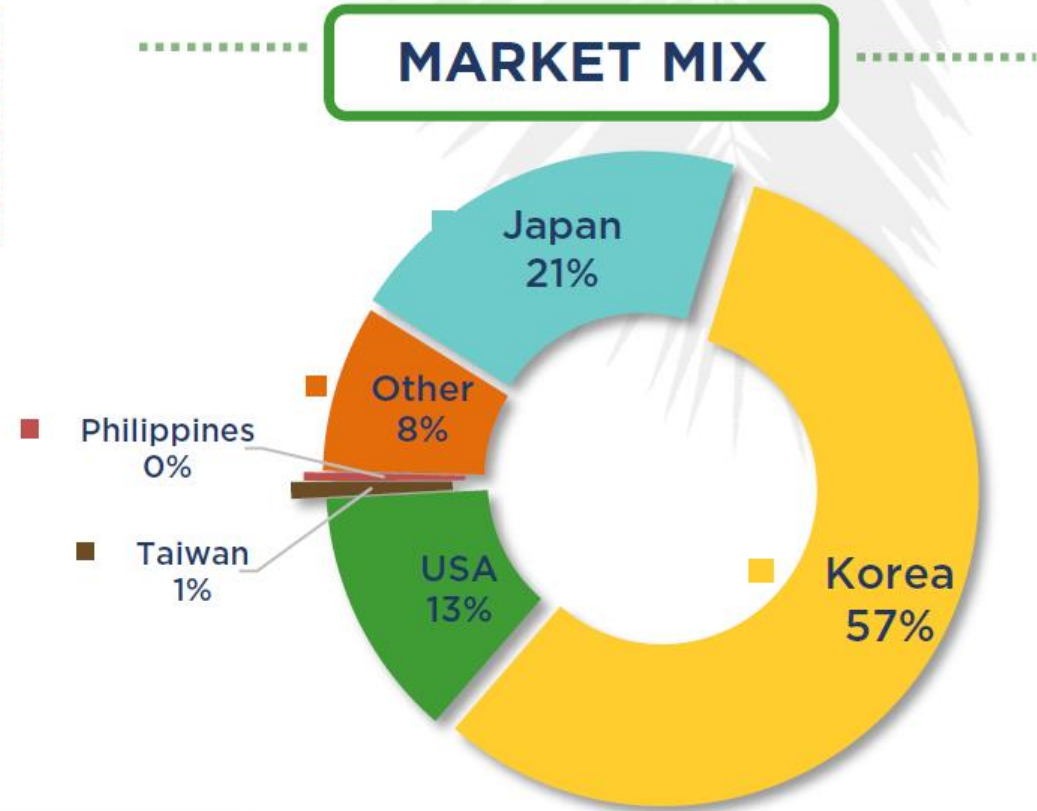
→ Gross Take Off Weight per 1,000 pounds of 3.4 million

→ Nearly 45 million pounds of cargo and mail

→ **GIAA ranked 9th in Overseas Arrivals for United States Ports of Entry in 2019**

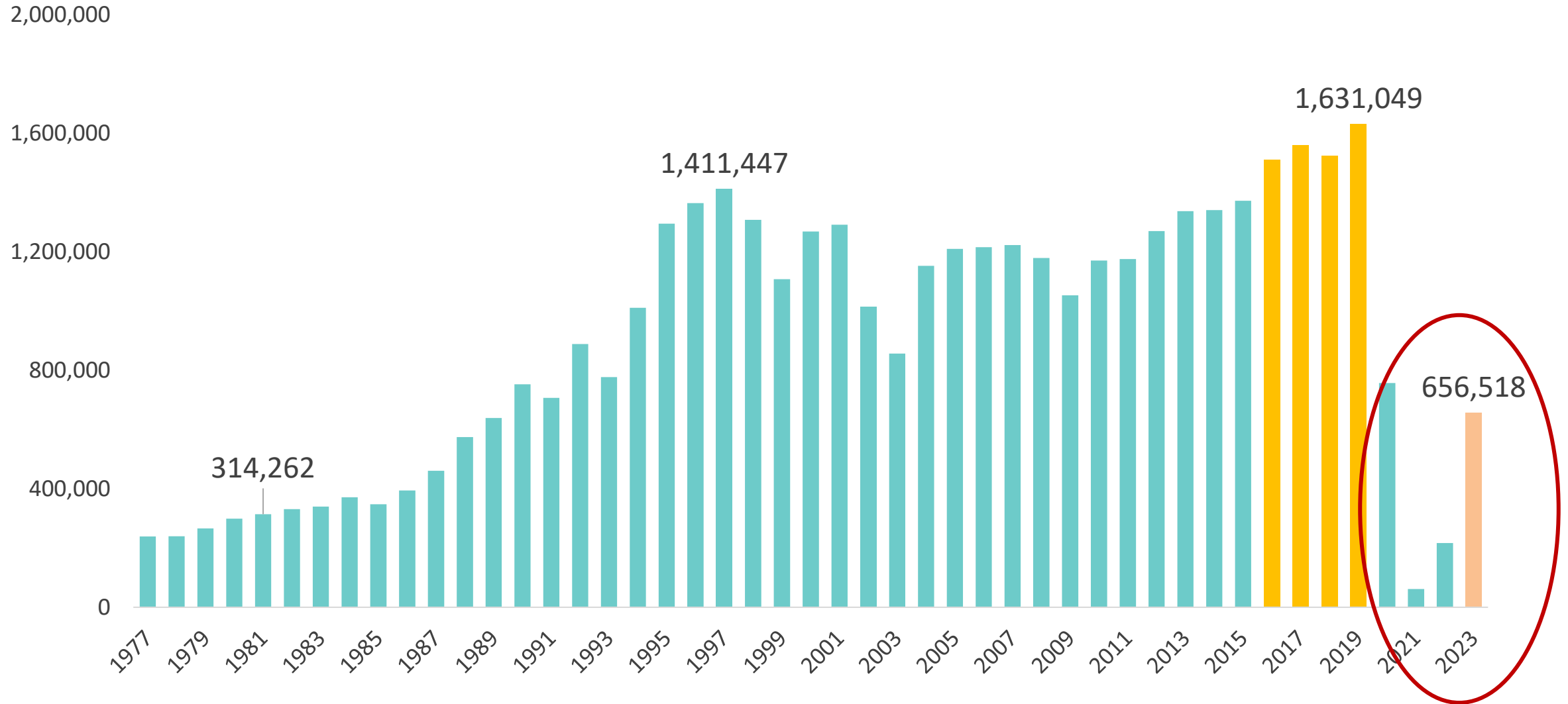
Global Pandemic Covid-Impact

<u>Market</u>	<u>2019</u>	<u>2023</u>	<u>% vs 2019</u>
Korea	753,357	371,903	-50.6%
Japan	684,802	136,736	-80.0%
US/Hawaii	90,994	83,677	-8.0%
Philippines	20,729	13,638	-34.2%
Taiwan	28,216	5,600	-80.2%
China	11,496	2,756	-76.0%

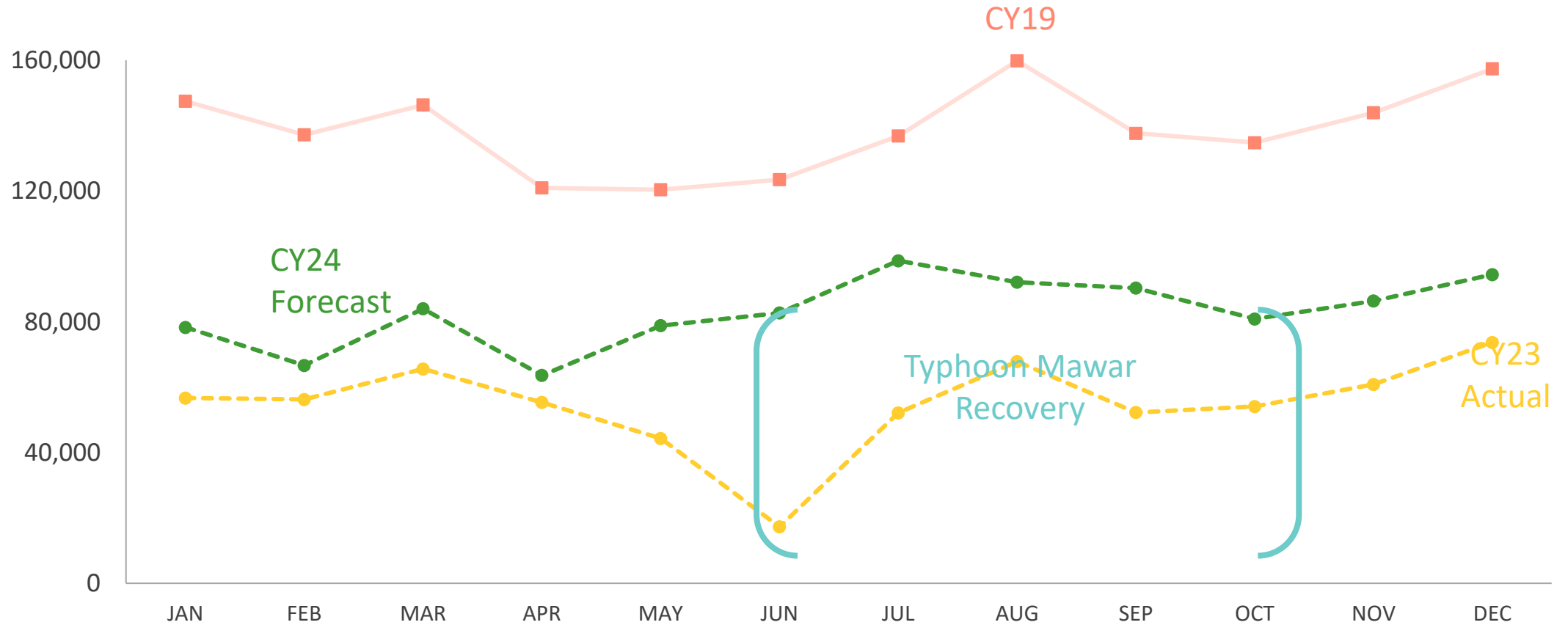


TOTAL FY2023 ARRIVALS = 656,518
 (40% of 2019 Levels)

Guam's Historical Arrivals



Road to Recovery-2024



CY2024 arrival projections anticipates around
60%-70% of 2019 levels

SOUTH KOREA MARKET



A.B. WON PAT INTERNATIONAL
AIRPORT GUAM



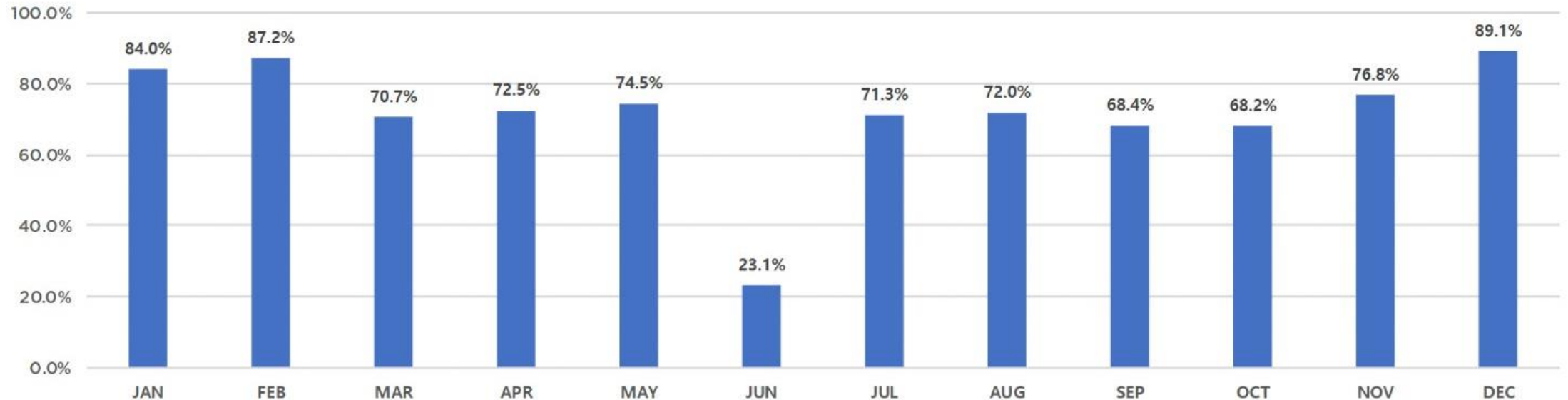
South Korea Market Recovery

CY2023 KOREAN ARRIVAL

KOR-GUM SUPPLY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
SEAT CAPACITY	47,189	43,190	51,641	48,966	38,170	12,402	37,846	44,146	42,700	45,186	40,839	45,974	498,242

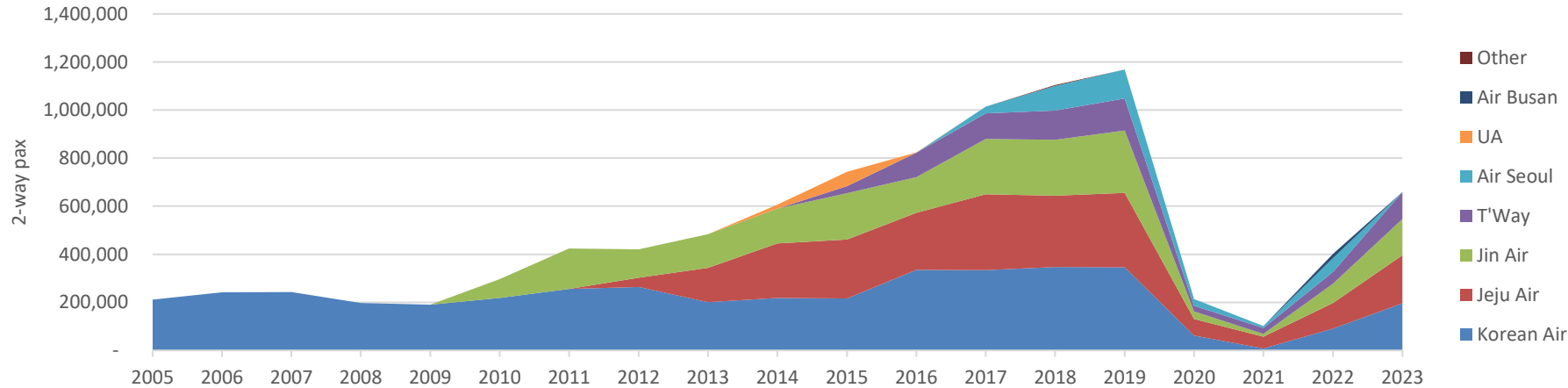
KOR-GUM DEMAND	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
TARGET LF%	84.0%	87.2%	70.7%	72.5%	74.5%	23.1%	71.3%	72.0%	68.4%	68.2%	76.8%	89.1%	75%
ACTUAL VISITOR	39,633	37,677	36,523	35,495	28,435	2,871	26,984	31,774	29,190	30,802	31,347	40,965	371,905

Load Factor KOR-GUM

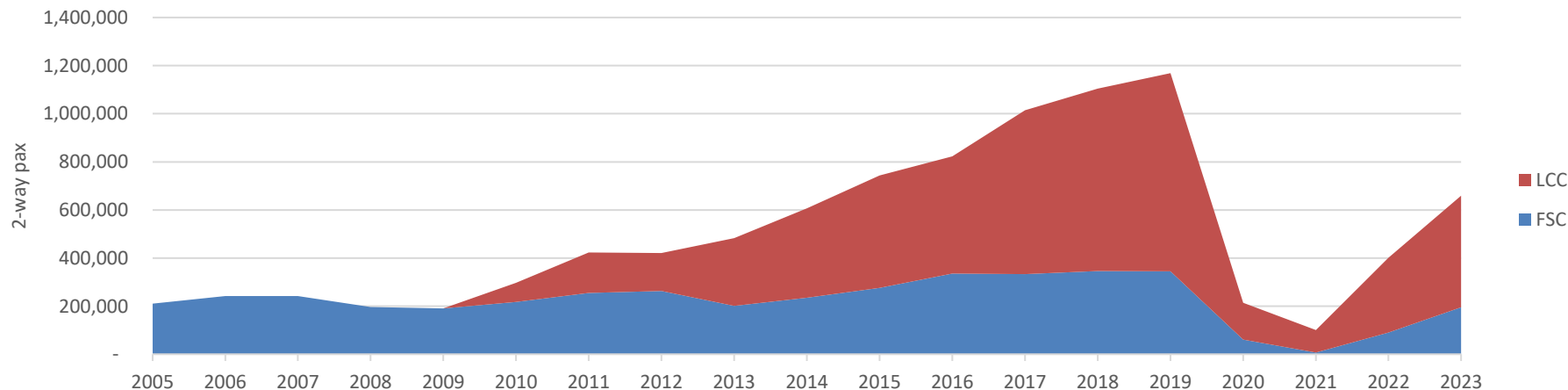


LCC Stimulation on ICN-GUM

GUM-ICN Pax Traffic 2005-2023 by Airline



GUM-ICN Pax Traffic 2005-2023 Airline Type



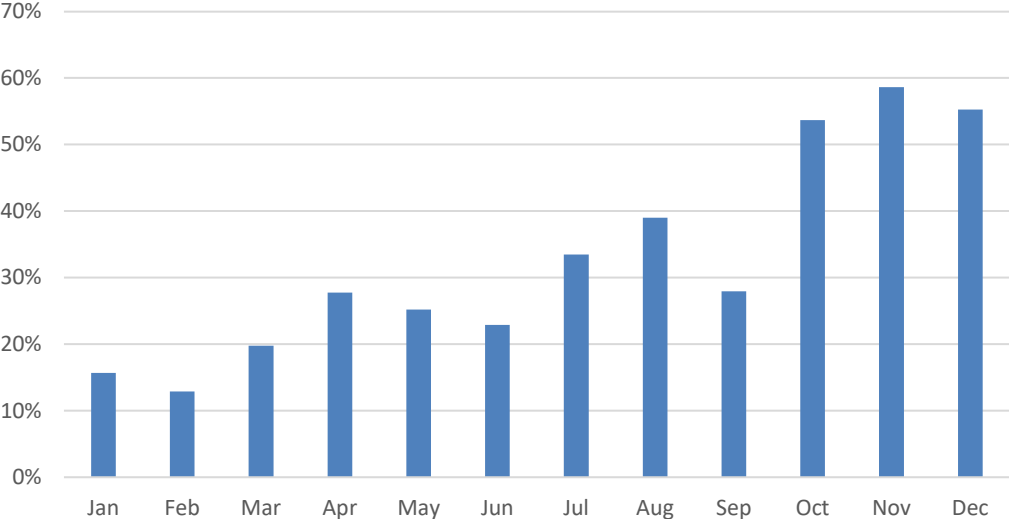
- Guam – Incheon traffic has largely grown from more than 210k in 2005 to over 837k in year 2016; Stimulation effect has been witnessed in market from beginning year 2010 when the low cost carrier Jin Air introduced its Guam service.
- During post-pandemic recovery, LCCs pick up the market faster than FSC, Contributes 70% share of the total passenger traffic on the market in 2023.

JAPAN MARKET

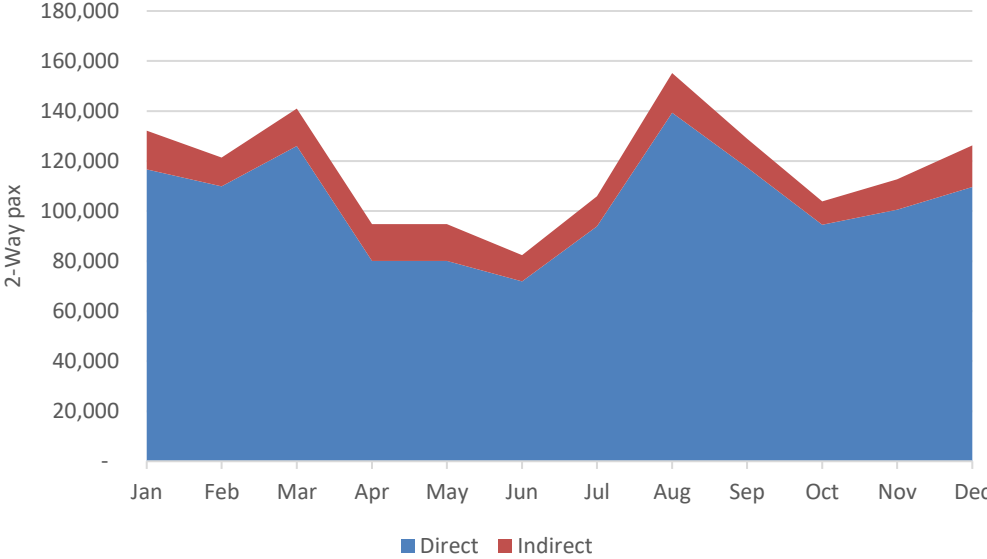


Japan Market Recovery

2023 Japan-Guam Market Monthly Pax Traffic Recovery of 2019



2019 Japan-Guam Market O&D Seasonality

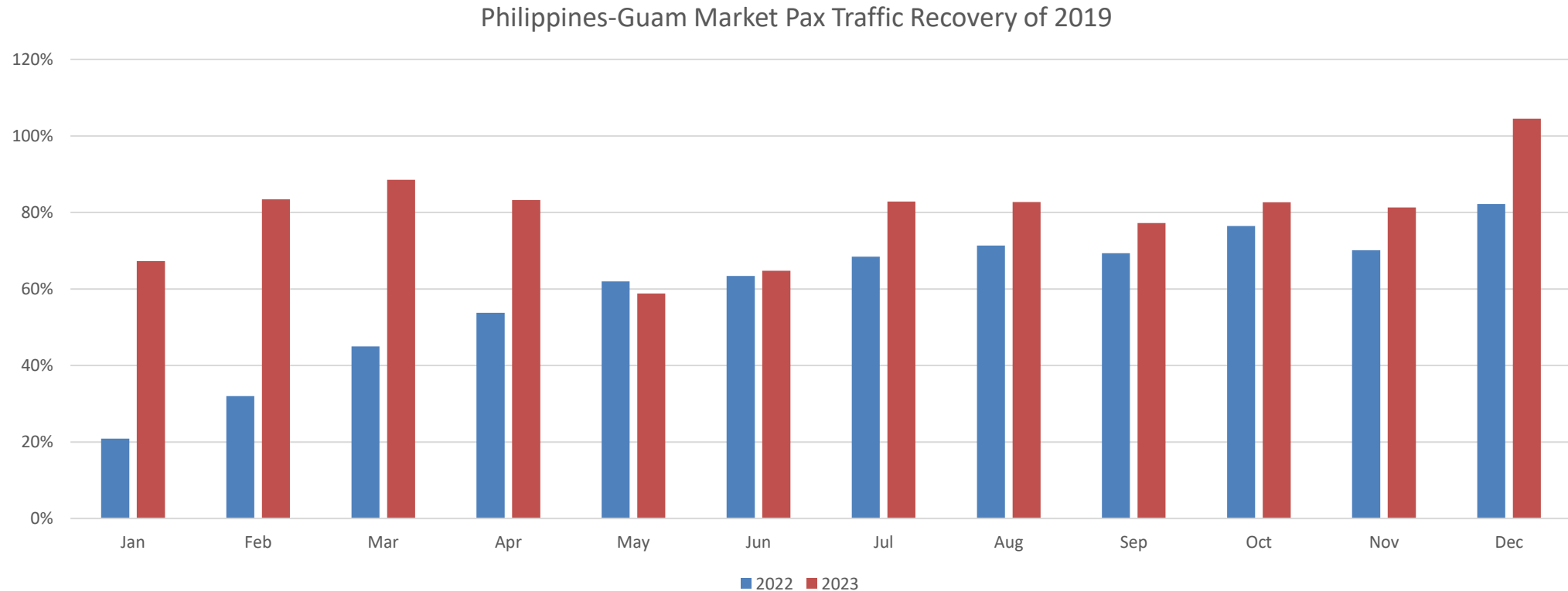


- 2023 Japan-Guam total traffic recovered to 33% of 2019.
- In 2019, 11% of the Japan-Guam O&D is Indirect pax, over 50% of this transit in ICN, and 2% transit in TPE.

PHILIPPINES MARKET



Philippines Market Recovery

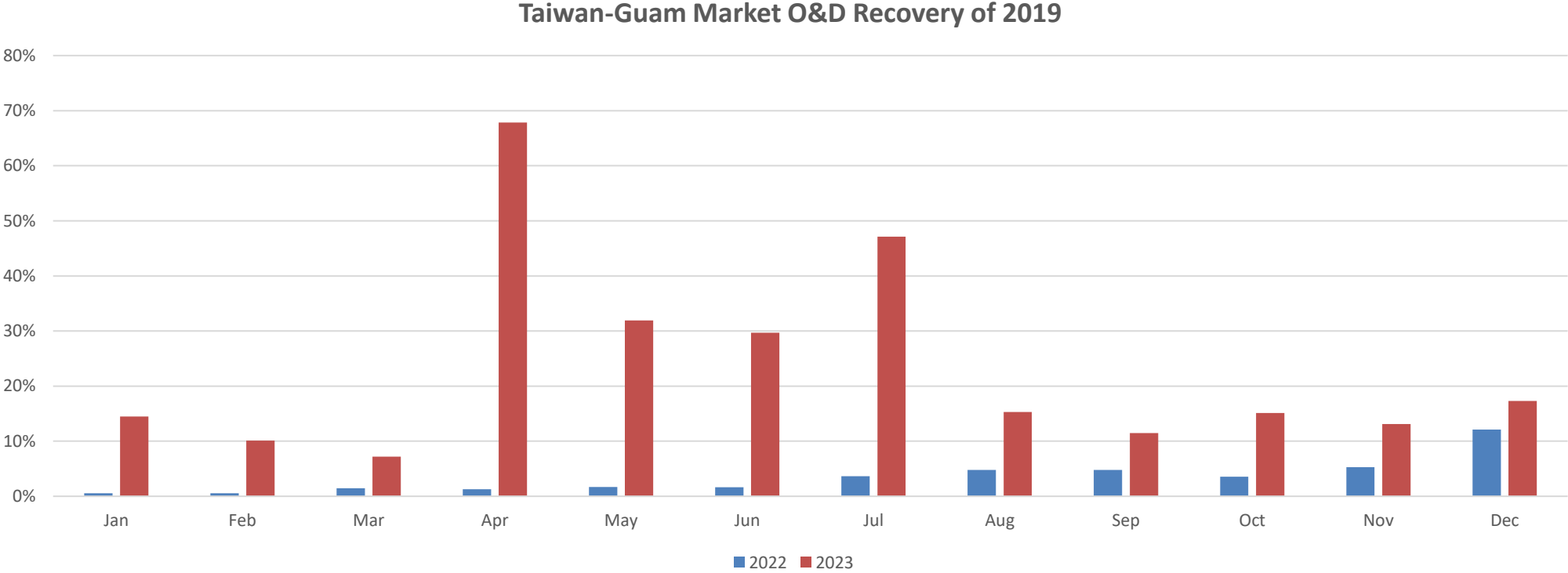


- 2022 Philippines-Guam total passenger traffic recovered to 60% of 2019 and to almost 80% in 2023.

TAIWAN MARKET



Taiwan-Guam O&D Recovery



- 2023 Taiwan-Guam O&D recovered to 25% of 2019.
- In 2019, 5% of the Taiwan-Guam O&D is Indirect pax, 70% of this transit in ICN.

A.B. WON PAT INTERNATIONAL AIRPORT GUAM

A.B. WON PAT INTERNATIONAL
AIRPORT GUAM



Ms. Rolenda Faasuumalie
Airport Marketing Administrator
✉ rolenda@guamairport.net

Mr. Fred Tupaz
Management Consultant
✉ fredt@tmgguaam.net

Mr. Tony Griffin
Senior Vice President
ASM Global Route Development
✉ tony.griffin@informa.com

Mr. Hang Zhao
Consultant
ASM Global Route Development
✉ hang.zhao@asm-global.com

GUAM VISITORS BUREAU



401 Pale San Vitores Road
Tumon, Guam 96913

Ms. Nadine Leon Guerrero
Director of Global Marketing
+1671-6465278

✉ nadine.leonguerrero@visitguam.com

GLOBAL MARKETING TEAM



TOKYO, JAPAN

Tel: 03-3213-9987
nobuyoshi.shoji@gvb.or.jp



SEOUL, SOUTH KOREA

Tel: + 82 10 9175 0102
jay.park@visitguam.org



TAIPEI, TAIWAN (R.O.C.)

Tel: + (886) 2 2325-9923
taiwan@visitguam.com



TAGUIG, PHILIPPINES

Tel: +1671-6465278
nadine.leonguerrero@visitguam.com



Si Yu`us Ma`ase`!



A.B. WON PAT INTERNATIONAL
AIRPORT GUAM

