



TAIWAN MARKET UPDATE

SEPTEMBER 2024

AGENDA



1. CALL TO ORDER
2. REPORT OF MANAGEMENT
3. MARKET UPDATES
 - a. Taiwan Visitor Arrivals – Review & Forecast
 - b. Airline & Market Intelligence
 - c. Taiwan News
4. OLD BUSINESS
 - a. GTO Activities
 - i. PR/ AD Update
 - ii. Taipei International Tourism Expo (TITE)
 - iii. Mid-Autumn Media Gathering
 - b. Consumer Sentiment
 - c. Social Media Performance
5. NEW BUSINESS
 - a. #JustGuam Online Webinar
6. ACCOUNT SUMMARY
7. ANNOUNCEMENTS
 - a. Guam Events – September 2024
 - b. Next Taiwan Market Update Meeting - October 3, 2024 at 11am (subject to change)
8. ADJOURNMENT

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July 2024



July 1-31, 2024

Total: 59,180 (+14.9%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.6%	Taiwan	2,550	1,114	355	-68.1%
50.4%	Korea	67,861	26,979	29,823	10.5%
25.5%	Japan	47,904	10,958	15,089	37.7%
14.1%	US/Hawaii	7,648	7,626	8,358	9.6%
1.9%	Philippines	1,481	1,160	1,115	-3.9%
0.9%	China	814	343	537	56.6%
0.1%	Hong Kong	420	71	76	7.0%

Calendar Year to Date 2024



January – July 31, 2024

Total: 445,577 (+28.4%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.5%	Taiwan	17,183	4,710	2,008	-57.4%
52.7%	Korea	425,522	207,813	234,911	13.0%
25.1%	Japan	368,414	49,493	111,841	126.0%
12.3%	US/Hawaii	57,036	50,242	54,595	8.7%
1.7%	Philippines	11,644	7,842	7,592	-3.2%
0.7%	China	7,440	1,152	3,021	162.2%
0.1%	Hong Kong	3,660	433	412	-4.8%

Fiscal Year to Date 2024



October 2023 – July 31, 2024

Total: 634,259 (+31.6%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.4%	Taiwan	23,471	5,002	2,529	-49.4%
53.3%	Korea	607,589	297,600	338,031	13.6%
25.6%	Japan	529,197	61,153	162,414	165.6%
11.8%	US/Hawaii	79,634	69,381	74,617	7.5%
1.8%	Philippines	18,047	11,445	11,240	-1.8%
0.6%	China	10,782	1,349	3,949	192.7%
0.1%	Hong Kong	5,688	562	651	15.8%

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

Note: July 2024 Daily Arrivals reflect Civilian Air arrivals only

Market Intelligence: Airline Updates



Current Route in Operation: (September 2024)


China Airlines CHINA AIRLINES

- See next page for September operations schedule

Eva Air

- Tokyo, Osaka, Seoul, Hanoi, BKK, Manila, Jakarta, Bali, Singapore, Ho Chi Minh City, LA, San Francisco, New York, Vancouver, London, Hong Kong, Macao, Paris, Seattle - Daily
- Kuala Lumpur, Brisbane - Three flights per week

Starlux Airlines

- Macau, Penang, Bæ  STARLUX, Tokyo, Kuala Lumpur, Ho Chi Minh City, Singapore – Daily
- Manila – Monday, Wednesday, Thursday, Friday, Saturday

Market Intelligence: Airline News



CI September Operation Schedule :



Location					
North America	Operation Schedule	Southeast Asia	Operation Schedule	Southeast Asia	Operation Schedule
Los Angeles	Daily	Bangkok	Daily	Ho Chi Minh City	Daily
Ontario	Daily	Singapore	Daily	Hanoi	Daily
San Francisco	Daily	Jakarta	Daily	Manila	Daily
Vancouver	Daily	Kuala Lumpur	Daily	Bali	Daily
Seattle	5 flights/week	Penang	Daily	Da Nang	Daily
New York	4 flights/week	Cebu	5 flight/week	Kagoshima	2 flights/week
		Chiang Mai	5 flights/week	Phnom Penh	5 flights/week
		Palau	4 flights/week	Yangon	3 flights/week
				Brunei	3 flight/week

Market Intelligence: Airline News



CI September Operation Schedule :




CHINA AIRLINES

Location							
Europe	Operation Schedule	Oceania	Operation Schedule	Northeast Asia	Operation Schedule	Northeast Asia	Operation Schedule
Amsterdam	5 flights/week	Sydney	5 flights/week	Nagoya	Daily	Busan	Daily
Frankfurt	Daily	Melbourne	4 flights/week	Fukuoka	Daily	Okinawa	Daily
London (Heathrow)	5 flights/week	Brisbane	5 flights/week	Osaka	Daily	Takamatsu	5 flights/week
Rome	3 flights/week			Tokyo(HND)	Daily	Hiroshima	5 flights/week
Vienna	4 flights/week			Tokyo(NRT)	Daily	Hong Kong	Daily
Prague	2 flights/week			Seoul(ICN)	Daily	Shanghai	Daily
				Seoul(GMP)	3 flights/week		

Airline Updates for Regular Flights



Airlines	GTO Contact	Updates
 CHINA AIRLINES	8/30 Tao Ming Sung, Sales Manager	<ul style="list-style-type: none"> China Airlines is exploring the possibility of restarting direct flights to Guam, concentrating on evaluating market interest, strengthening collaborations with GVB, and implementing creative approaches to market the route.
	8/30 Gary Wang, Executive Vice President	<ul style="list-style-type: none"> EVA Air continues to evaluate the resumption of direct routes to Guam due to shortages of capacity and the cabin crew.
	8/30 Patience Hsu, Manager	<ul style="list-style-type: none"> Spunk Tour, Phoenix Tours, and Lion Travel will be launching direct charter flights in collaboration with Starlux for Chinese New Year.
	8/30 Jason Chen, Area Manager – Taiwan	<ul style="list-style-type: none"> Philippine Airlines will announce its winter schedule in September and continue monitoring the travel patterns of Taiwanese passengers.
	8/30 Steven Shih, General Manager	<ul style="list-style-type: none"> Royal Air Philippines has expressed interest in collaborating with Taiwanese travel agents to organize charter flight operations to Guam.
	8/30 Brenda Tang, General Manager – Sales Taiwan	<ul style="list-style-type: none"> United Airlines is evaluating the possible resumption of direct flights from Taipei to Guam and assessing the market's profitability.

Taiwan reveals 'Waves of Wonder' tourism brand in London

- Taiwan's Tourism Administration launched its "Waves of Wonder" tourism brand in London, aiming to attract more visitors from Europe and the U.S. in late 2024.
- To boost visibility, Taiwan is promoting itself on taxis, and buses, leveraging its recent recognition as the "Best Leisure Destination in Asia" by Global Traveler magazine. The campaign also involves collaborations with airlines to make travel to Taiwan more accessible and encourages working holidays for young visitors.
- The "Waves of Wonder" campaign will continue with upcoming events in Paris and New York, aiming to increase Taiwan's appeal as a top destination for leisure and extended stays.



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Meeting with Brogent Group

- Date: August 2
- GVB met with Brogent Group, a digital content creating company based in Kaohsiung, Taiwan. They have expressed interest in learning about Guam's incentives, building regulations, and collaboration opportunities.
- The company offers expertise in software and hardware development, with diverse industry experience to turn imaginative concepts into cutting-edge entertainment solutions for theme parks and leisure centers.
- Brogent Group intends to schedule an on-site inspection in Guam as part of their ongoing evaluation for the new project.



Meeting with China Airlines Taipei Branch

- Date: August 14
- GVB met with the new Vice President of China Airlines' Taipei Branch, Mr. Cheng-Yu Feng, who has significant experience in international route management. In addition, he brings expertise from his roles across various regions, including the U.S. and Guam.
- GVB shared efforts to remain active in marketing Guam to Taiwanese travelers, despite a lack of direct air service, and continues to participate in events and collaborate with media and travel agencies to keep Guam top-of-mind.
- China Airlines is optimistic about the resumption of direct flights to Guam and continues to assess market demand, and focus on partnerships to promote the route through innovative strategies.



Felix, Director of GTO, Cheng-Yu Feng, Vice President of China Airlines' Taipei Branch



Song Tao Ming, Sales manager of Sales & Marketing department of China Airlines Taipei Branch, Cheng-Yu Feng, Vice President of China Airlines' Taipei Branch, Felix, Director of GTO,



2024 Taiwan International Tourism Expo (TITE) Opening Ceremony

- Date: August 16
- GVB participated in the 2024 TITE opening ceremony which welcomed many participants this year including travel agents, hoteliers, and airline partners.
- The Foreign Minister of MOFA, Mr. Lin Chia-Lung, attended the opening ceremony to show his unwavering support in the event.
- During the opening ceremony Mr. Chia-Lung mentioned that he has previously met Governor Lou Leon Guerrero and will continue to support the resumption of direct flights to Guam.



Mr. Lin Chia-Lung, the Foreign Minister of MOFA, Felix, Director of GTO



Taipei International Tourism Expo (TITE)



2024 Taipei International Tourism Expo (TITE)

- Date: August 16-19
- GVB successfully participated in the annual event to actively promote Guam as a premier travel destination to Taiwanese consumers.
- During the four-day expo, GVB introduced the Ko'ko' bird mascot at the Guam booth, attracting many visitors who took photos and inquired about its history.
- Visitors at the booth showed strong interest in Guam's offerings such as local attractions and hotels. Those who were interested in visiting destination Guam were provided with the Guam guidebooks to help in their planning.
- After holding the Lucky Draw event, GVB gained over 1,000 new followers on social media and collected over 1,200 survey responses.



Mid-Autumn Media Gathering



- Date: September 3rd 2024
- Location: Regent Taipei
- GVB hosted a successful media gathering before the Mid-Autumn Festival, to express appreciation to Taiwan's main media outlets.
- The gathering welcomed 30 news reporters and 22 media outlets and highlighted Guam's initiatives, including charter flights during the Chinese New Year, new offerings, and Guam's achievements throughout the year.
- The media showed strong interest in the resumption of direct flights to Guam and will help provide valuable exposure to Taiwan audiences.
- Media attendees received Guam gifts and mooncakes and had the opportunity to win Lucky Draw grand prizes.
- GVB would like to thank the featured sponsors for their valuable support in the Lucky Draw event: The Tsubaki Tower, Dusit Beach Resort Guam, and Crowne Plaza Resort.



Consumer Sentiment



Facebook (*Håfa Adai Support Program*)



Facebook (*Guam Scenery*)



2024 TITE! I like Blue Aster Chapel the most!



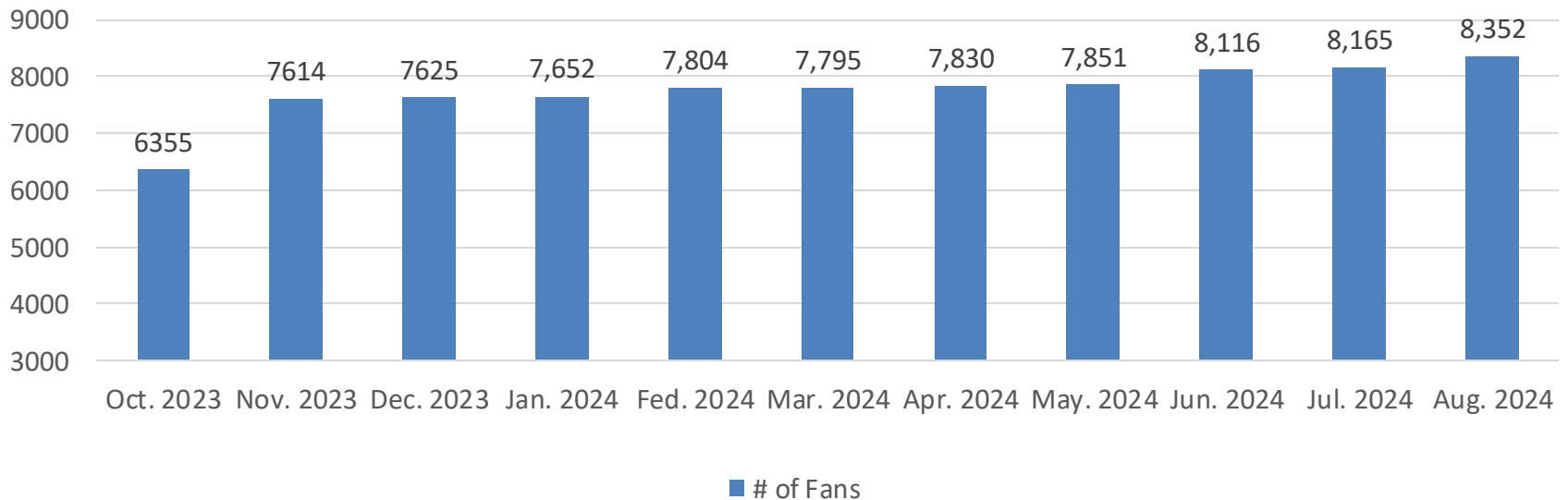
2024 TITE! I really like the Aquarium of Guam!

Tumon Bay is a wonderland!

Social Media Performance FY2024



of Fans



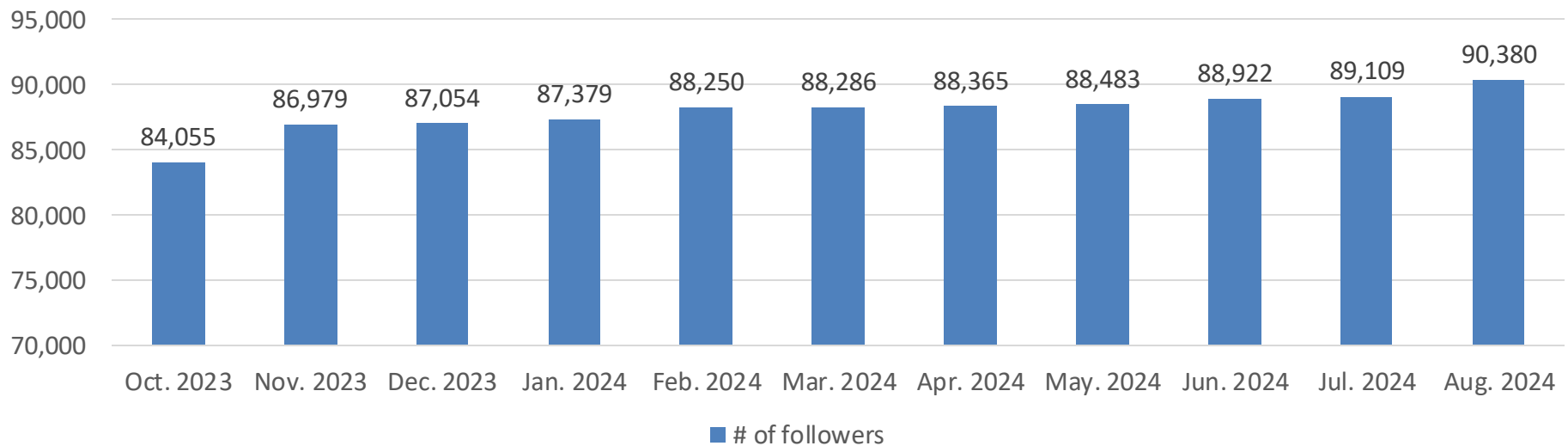
Monthly percentage growth (Aug): +2.3%

Social Media Performance FY2024



Total Page Followers

of followers



Monthly percentage growth (Aug): +1.43%

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#JustGuam Webinar

- Date: September 19th, 2024
- GVB will host the annual webinar to provide the latest information on Guam's product offerings and special incentives, while reinforcing partnerships with industry partners and travel agencies based in Taiwan.
- The one-day virtual event seeks to build connections with travel agents interested in promoting Guam as a premier travel destination, with the goal of increasing awareness and attracting more travelers from the Taiwan market.
- The events plans to welcome over 300 travel agents who are participating from Taipei, Taoyuan, Hsinchu, Miaoli, Taichung, Kaohsiung, Penghu, and other cities.
- GVB would like to give a special thanks to members who have registered for the event. The free virtual platform will provide an excellent opportunity for participants to present their latest business information and product offerings.



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Account Summary



FY2024 Budget

as of 09/04/2024

FY2024 Taiwan Actual Spend versus Budget YTD

G/L Code	Account Title	Budget	Paid	Pending	Remaining \$	Remaining %
PRE001	Marketing Representative Fees	\$ 156,000.00	\$ 132,000.00	\$ 24,000.00	\$ -	0.00%
PRE005	Sales Calls	\$ 12,000.00	\$ 9,670.93	\$ 2,329.07	\$ -	0.00%
TTC039	Media/Travel Industry Fam Tours	\$ 68,000.00	\$ 35,953.01	\$ 32,046.99	\$ -	0.00%
ADV018	Social Media/Online Campaigns & Advertising	\$ 24,000.00	\$ 16,960.90	\$ 6,836.10	\$ 203.00	0.85%
TTC031	Travel Fairs	\$ 13,700.00	\$ 9,604.63	\$ 4,039.13	\$ 56.24	0.41%
SMD023	Travel Trade Co-ops & MICE Programs	\$ 166,300.00	\$ 92,626.34	\$ 67,622.31	\$ 6,051.35	3.64%
SMD019	Sales Market Development (HQ)	\$ 60,000.00	\$ 48,867.96	\$ 10,400.00	\$ 732.04	1.22%
	GRAND TOTAL	\$ 500,000.00	\$ 345,683.77	\$ 147,273.60	\$ 7,042.63	1.41%

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MANGILAO DONNE' FESTIVAL



2024

at the Mangilao Night Market Grounds
Friday, September 13 at 5PM to 9PM
Saturday, September 14 at 11AM to 9PM
Sunday, September 15 at 11AM to 9PM

*Interested vendors and food trucks can contact 671-734-2163/5731
or Vice Mayor Kevin at 671-689-6231.*



SAVE THE DATE

30 YEARS
2024 GUAM INTERNATIONAL COASTAL CLEANUP

6:00AM - 9:00AM
ISLANDWIDE

GUAM SANDFEST 2024
SAND ART FESTIVAL
"Preserve our Beaches, Protect our Shores"

10:00AM - 4:00PM
YPAO BEACH

TWO EVENTS / ONE DAY

09 | 21 | 2024
SATURDAY

For more information, please contact:

Guam Coastal Management Program
Steven Dierking - Coastal Cleanup Inquiries
(671) 475 - 9647 | steven.dierking@bsp.guam.gov

Project Coordinator
Sierra Tenorio - Guam SandFest Inquiries
(671) 477 - 1239 | info@sandfestguam.com

Sponsored by NOAA Grant #NA21N054190154

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