## TAIWAN MARKET UPDATE

# **OCTOBER 2024**



- 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. #JustGuam Online Webinar
    - iii. FY2024 Year End Recap
  - b. Consumer Sentiment
  - c. Social Media Performance
- 5. NEW BUSINESS
  - a. FY2025 Q1 & Q2 Activities
- 6. ACCOUNT SUMMARY
- 7. ANNOUNCEMENTS
  - a. Next Taiwan Market Update Meeting November 7, 2024 at 11am (subject to change)
- 8. ADJOURNMENT



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## August 2024

August 1-31, 2024

Total: 66,474 (-1.3%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.3%	Taiwan	2,730	231	178	-22.9%
43.2%	Korea	65,330	31,774	28,728	-9.6%
39.3%	Japan	75,521	23,534	26,137	11.1%
9.0%	US/Hawaii	6,353	6,677	5,999	-10.2%
1.7%	Philippines	1,387	1,253	1,148	-8.4%
0.8%	China	975	390	514	31.8%
0.1%	Hong Kong	361	78	79	1.3%



## Calendar Year to Date 2024



#### January – August 31, 2024

Total: 512,802 (+23.6%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.4%	Taiwan	19,913	4,941	2,191	-55.7%
51.4%	Korea	490,857	239,592	263,661	10.0%
26.9%	Japan	444,134	73,058	138,049	89.0%
11.9%	US/Hawaii	64,669	57,404	60,962	6.2%
1.7%	Philippines	13,032	9,096	8,741	-3.9%
0.7%	China	8,418	1,542	3,537	129.4%
0.1%	Hong Kong	4,021	511	491	-3.9%



#### October 2023 – August 31, 2024

Total: 701,484 (+27.6%)

% Market Mix	Origin	2019	2023	2024	% to LY
0.4%	Taiwan	26,201	5,233	2,712	-48.2%
52.3%	Korea	672,924	329,379	366,781	11.4%
26.9%	26.9% Japan		84,718	188,622	122.6%
11.5%	11.5% US/Hawaii		76,543	80,984	5.8%
1.8%	Philippines	19,435	12,699	12,389	-2.4%
0.6%	China	11,760	1,739	4,465	156.8%
0.1%	Hong Kong	6,049	640	730	14.1%

### Market Intelligence: Airline Updates



#### **Current Route in Operation: (October 2024)**

#### **China Airlines**



- See next page for October 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, Bar STARLUX okyo, Kuala Lumpur, Ho Chi Minh City, Singapore Daily
- Manila Monday, Wednesday, Thursday, Friday, Saturday

### Market Intelligence: Airline News

#### CI October Operation Schedule :



Location									
North America	ca Operation Schedule Southeast A		Operation Schedule	Southeast Asia	Operation Schedule				
Los Angeles	Daily	Bangkok	Daily	Ho Chi Minh City	Daily				
Ontario	Daily	Singapore	Daily	Daily Hanoi					
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				

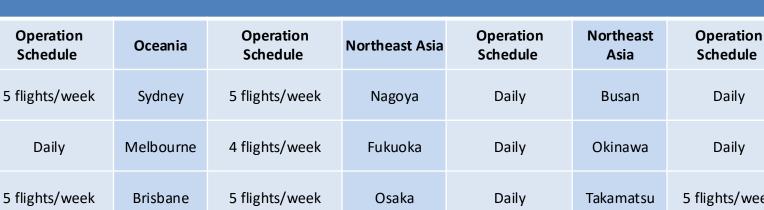


### Market Intelligence: **Airline News**

#### **CI October Operation Schedule :**

Europe

Amsterdam



**CHINA AIRLINES** 

/ inster dum	5 mgnus week	Sydney	5 mgmby week	Nugoyu	Duny	Busun	Dany
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		

Location



### Airline Updates for Regular Flights



Airlines	GTO Contact	Updates
Sechina Airlines	9/27 Tao Ming Sung, Sales Manager	<ul> <li>China Airlines is considering the revival of direct flights to Guam, focusing on gaining market demand, enhancing partnerships with GVB, and using innovative marketing strategies for the route.</li> </ul>
EVA AIR 長榮航空	9/27 Gary Wang, Executive Vice President	<ul> <li>EVA Air is still assessing the possibility of resuming direct flights to Guam, citing capacity limitations and cabin crew shortages as challenges.</li> </ul>
<b>STARLUX</b> 星宇航空	9/27 Patience Hsu, Manager	<ul> <li>Starlux Airlines has begun initial talks with Spunk Tour regarding potential flights after the Chinese New Year charter services or in the first quarter in 2025.</li> <li>They are considering twice-weekly red-eye flights and consulting with travel market operators. Spunk Tour, Phoenix Tours, and Lion Travel have confirmed the Chinese New Year Starlux charter flights.</li> </ul>
Philippine Airlines	9/27 Jason Chen, Area Manager – Taiwan	<ul> <li>Philippine Airlines will announce its winter schedule in 2024 Q3-Q4 and will continue monitoring the Taiwanese travel market.</li> </ul>
UNITED AIRLINES	9/27 Brenda Tang, General Manager – Sales Taiwan	<ul> <li>United Airlines General Manager Brenda mentioned that they prefer direct flights as the primary option and have a positive outlook on destination Guam.</li> </ul>

### Taiwan News



#### Taiwan offers foreign tourists buy-one-get-one-free transport pass

- Taiwan's Tourism Administration announced a buy-one-get-onefree offer for the seven-day Taiwan Pass, aimed at boosting tourism and offers unlimited rides on Taiwan High-Speed Rail for three days.
- The pass, priced at NT\$5,000 (US\$156.4) for two, is available to foreign tourists for short-term visits and can be used separately. It covers travel across Taiwan's major cities and popular tourist destinations, expiring seven days after first use.
- The promotion, which started on Sept. 13, 2024, will run until April 30, 2025, with approximately 3,000 passes available for purchase. This initiative is part of the government's broader effort to attract more international visitors to Taiwan.





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### PR/AD Update



#### Legislative Yuan USA Caucus (LUC) Meeting Request

- Date: September 2
- GVB met with Legislator Wang to discuss collaborative opportunities and mentioned that his team is currently in discussions with the Minister of Economic Affairs regarding the "Three-Hour Economic Circle," which aims to establish cooperative relationships with countries within a three-hour flight from Taiwan.
- Since Guam is 3.5-hour direct flight from Taiwan, there is great potential to include Guam. If this policy is passed, the issue of TPE-GUM direct flight resumption could be bundled together for consideration.



Felix, Director of GTO, Wang Ting-yu, Co-Chairman of the "Legislative Yuan USA Caucus" (LUC)

### PR/AD Update



#### Partnership Reception Co-hosted by AIT and Taiwan MOEA

- Date: September 5
- GVB attended a joint networking event co-hosted by AIT and the Ministry of Economic Affairs, where they had the opportunity to interact with Minister Chih-Hui Kuo.
- Along with ASOA members, GVB actively engaged in discussions with Minister Kuo during the event and expressed interest in exploring future tourism and investment opportunities for Taiwanese visitors.







#### MOFA Hosted Banquet for Representatives of U.S. State Offices in Taiwan

- Date: September 26
- GVB was invited to luncheon by Deputy Minister Chen of MOFA to discuss the current situation in various states and to understand areas where the Ministry of Foreign Affairs can provide assistance.
- GVB shared with Deputy Minister Chen that the resumption of direct flights to Guam remains one of our primary goals. He expressed hope for more support from the Deputy Minister in restoring the direct flight TPE-GUM route.





### #JustGuam Webinar for Travel Agents



- Date: September 19
- GVB hosted the annual #JustGuam Online Webinar aimed to update travel agencies based in Taiwan on Guam's attractions, charter and transit flights, and incentives while strengthening industry relationships.
- The webinar introduced incentive programs focused on M.I.C.E. and Adventure Sports, and showcased Guam's hospitality and latest product offerings throughout the presentations.
- A total of 119 travel agents from Taipei, Taichung, Kaohsiung, Changhua, Taoyuan, Hsinchu participated in the one-day virtual event. GVB held Lucky Draw sessions to keep TA participants engaged.
- The webinar was met with positive feedback and was also featured in an article by industry magazine Travel Rich, increasing media exposure for Guam.







台灣辦事處於9/19舉辦

「#JUSTGUAM就是關島・關島

旅游線上說明會」,邀請關島都喜天

關為樁塔飯店、魚眼海洋公園、關

島跳傘俱樂部等當地業者參與分享。

關島觀光局局長暨執行長Carl T.C.

Gutierrez表示,南島語族歷史讓台灣

與關島之間有著深厚的連結,只需領

源、ແ京海灘度假村、開島樂天飯店



這座安全、富有文化魅力的頂級度假 勝地。也期望未來能恢復直航·以增 進經濟發展、農業投資、醫療旅遊。 開島台灣辦事處處長嚴樹芬指出 世邦旅游观观观旅游分別於2025/1/25 與1/29包機直飛剧島,雄獅旅遊則預計 於2025/1/26與1/30提供2班包機服 務·推出春節期間的5天4夜旅遊方案。 與當地冒險活動賽事,超過15人也有相 為台灣旅客提供更便利的直接深摆。 對應補貼,更多詳細資訊可洽關島觀光 短4小時的飛行,台灣旅客即可抵達 除了旅行社機+酒的優惠行程,為刺

F年句機的旅客,常她熱門飯は **免發優惠券、關島購物袋和新**年 除了直飛包機外,還有「非動 關島假期,即日起每週1團(10 席),採「台北一馬尼拉一關 只需要3小時。另外還可以利用 東京羽田/或田、大阪、福岡・以及菊 國仁川、釜山中轉的方式前往。此外 關島觀光局提供獎勵措施・只要50人以 上企業運動,停留超過3時,依圖體個 模分级感触,包括精緻贴心包、得點入 場門票折扣、客製托特包、貝殼花環/ 立牌迎賓服務、關島文化表演。或是參

「 買氣・ 關島 観光局將提供搭奏

### #JustGuam Webinar for Travel Agents



Special thanks to the GVB members who participated in the webinar and sponsored Lucky Draw prizes:



GUAM · RESORT



BEACH RESORT GUAM





THE TSUBAKI TOWER





### FY2024 Year End Recap



Please see video attached via email.





#### FY2024 Major Projects

- Arrivals: 2,712 (2023 October to 2024 31<sup>st</sup> August)
- Media Exposure US Value: USD\$3,908,872 (2023 October to 2024 August)
- SNS:
  - In FY2024, GTO organized numerous lucky draw events to engage with our fans, shared many stunning photos of Guam to showcase its natural beauty and successfully promoted the main events in Guam.
  - GVB Taiwan's Facebook page has 90,946 followers, a 6.10% increase from FY2023, while its Instagram page has 8,358 followers, up 25.05%.
- Efforts to Resume Direct Flight Service:
  - Strengthen ties with China Airlines, Eva Air, Starlux, and AIT.
  - In 2025, 3 travel agencies will collaborate with STARLUX Airlines to offer 4 direct charter flights for the Chinese New Year, along with additional incentives.
  - Through Fam Tours, CNY Gathering, and Mid-Autumn Festival media Gathering, GVB aims to maintain strong relationships and travel tourism between Taiwan and destination Guam.

### PR/AD Update



#### **NR Monitor**

For the past week (August 31– September 6), a total of 32 exposures are monitored including:

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- TV Exposure: 0
- Online Exposure: 32
- Newspaper: 0
- Social Media: 0

1 of the news reported that Mid-Autumn Festival Marks a New Journey: Guam Visitors Bureau Welcomes Taiwanese Tourists and Introduces Direct Charter Flights in 2025



着意的梦幻在这身化那干,是当果不可保测的诱惑之一· 歐層是以前時要求 使作

中秋新杂做单圈面具分步,更是许多人没有防御的感性纳强。除了實行,操肉和中用柚子外,就未解除的 台灣放家與標本決有紙質少量一段拉對的总有時光,原島就歸是統件的总報號球,原島的非理優勢也這為 台灣放客探索希臘的前導,尤其是制於總管海動型的防客。他將完產中期島的前希屬光,沙灘與新些海 水中,就說偏屈用勝時的奇樂洛區,"Hafa Adai」與證,過每一位放客就是到電子回歸的透腸。

推進2025百孫包機服務·強化台灣市場

部島観大四(Guam Visitors Bureau) 正極爆推進2025年歳 層新年期開始自然口機服務・費用市内協会構築 加油市客的時代・世形能行利益農業が行行分校2025年1月 25日時1月29日均衡自常開始。整新放動開始於2025年1月 26日時1月30日提供之所付機能務・推出素約新聞的方天匹後 防治方案。為台灣加坡提供更得特許自定講講。

### **Consumer Sentiment**



#### Facebook (Charter Flight Promotion)



Po Shen Hsu 熱賣中?請問如何購買? 🤮

Best-selling! How can I make a purchase?!

#### Facebook (Guam Scenery)



The sunset in Guam is a beautiful sight, with the entire ambiance and mood bathed in shades of pink.!

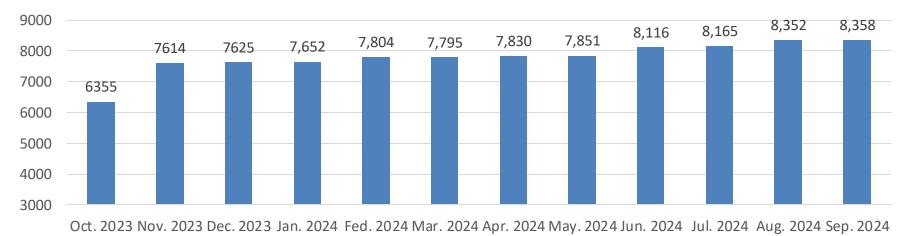
### Social Media Performance



#### Social Media Performance FY2024



# of Fans



# of Fans

Monthly percentage growth (Sep): +0.07%

### Social Media Performance

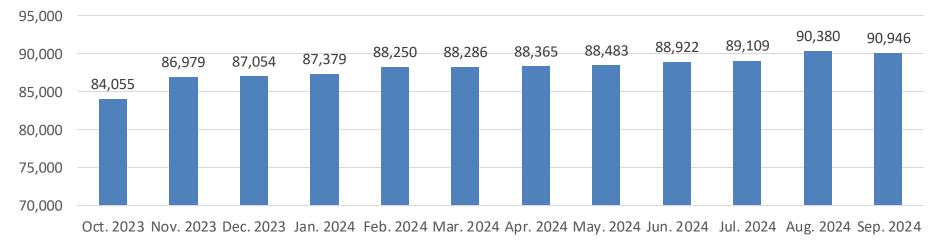


Social Media Performance FY2024



Total Page Followers

# of followers



# of followers

Monthly percentage growth (Sep): -0.28%

### October SNS Calendar



							Category
							Scenery
		Social N	Aedia October	<b>Content Calen</b>	dar		Lucky Draw
							GVB Events
							Other Promotion
			01-10-2024	02-10-2024	03-10-2024	04-10-2024	05-10-2024
Week 1	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			Guam's Restaurant			Guam Scenery	
	06-10-2024	07-10-2024	08-10-2024	09-10-2024	10-10-2024	11-10-2024	12-10-2024
Week 2	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	EDF Promotion		Guam Scenery	Taiwan National Day Lucky Draw Promotion			
						Guam's Restaurant	CNY Charter Flight Promotion
an na h-fraidh	13-10-2024	14-10-2024	15-10-2024	16-10-2024	17-10-2024 18-10-2024		19-10-2024
Week 3	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	Taiwan National Day Lucky Draw Promotion	Guam Scenery				Guam's Restaurant	EDF Promotion
		Labor Day Lucky Draw Winner Announce					
	20-10-2024	21-10-2024	22-10-2024	23-10-2024	24-10-2024	25-10-2024	26-10-2024
Week 4	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	CNY Charter Flight Promotion		Guam Scenery	Guam's Restaurant		EDF Promotion	Guam Scenery
	27-10-2024	28-10-2024	29-10-2024	30-10-2024	31-10-2024		
Week 5	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		Guam's Restaurant	Halloween Lucky Draw Promotion	Halloween Lucky Draw Promotion	KOL Co-op		
					Halloween Lucky Draw Winner Announce		



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### FY2025 Q1 & Q2 Activities

## GUAM

#### **EDF** Promotion

- Date: October 2025
- As Guam welcomes more travelers, GVB plans to promote the EDF (Electronic Declaration Form) through various platforms during FY2025. By completing it before arrival, travelers can help speed up the immigration process.
- In an effort to accelerate visitor arrival reports, GVB Marketing is stepping in to promote awareness and utilization of the EDF portal.

#### 2024 International Travel Fair

- Date: November 1<sup>st</sup>- 4<sup>th</sup> . 2025
- Organized by the Taiwan Visitors Association, Taipei's annual travel fair is one of the largest in the city, attracting over 350,000 attendees in 2023, making it a prime opportunity to promote Guam and showcase its beauty to Taiwanese visitors.
- This year, the goal is to attract over 200,000 visitors, with participation from popular destinations including South Korea, Thailand, Japan, and the Philippines at the 2024 International Travel Fair (ITF).





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### FY2025 Q1 & Q2 Activities

#### CNY Gathering

- Date: January 2025
- Lunar New Year is a significant festival in Taiwan, and in appreciation of the media's support for Guam, GTO plans to host a CNY gathering.
- This event aims to strengthen relationships with both the media and travel trade while introducing Guam's initiatives for 2025.
- It is essential to acknowledge and express gratitude for the support received from the media and travel trade over the past year.

#### Taipei Lantern Festival

- Date: February 2nd 16<sup>th</sup>, 2025
- The 2025 Taipei Lantern Festival, from February 2 to 16 in Ximen, invites GVB to participate following the success of 2024's event, which drew over 5.74 million visitors. GVB will showcase Guam's unique culture, including the Ko'ko' bird and Chamorro traditions, in a complimentary booth, highlighting the island's attractions and strengthening ties with Taipei, its sister city since 1973.









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### Account Summary



#### FY2024 Budget

										as of 09/30/2024
FY2024 Taiwan Actual Spend versus Budget YTD										
G/L Code	Account Title		Budget	Paid		Pending		Re	emaining \$	Remaining %
PRE001	Marketing Representative Fees	\$	156,000.00	\$	144,000.00	\$	12,000.00	\$	-	0.00%
PRE005	Sales Calls	\$	12,000.00	\$	10,478.74	\$	1,521.26	\$	-	0.00%
TTC039	Media/Travel Industry Fam Tours	\$	68,000.00	\$	47,780.47	\$	20,219.53	\$	-	0.00%
ADV018	Social Media/Online Campaigns & Advertising	\$	24,000.00	\$	22,487.17	\$	1,512.83	\$	•	0.00%
				•		•				0.400V
TTC031	Travel Fairs	\$	13,700.00	\$	9,874.60	\$	3,537.04	\$	288.36	2.10%
SMD023	Travel Trade Co-ops & MICE Programs	\$	166,300.00	\$	111,617.13	¢	54,202.93	¢	479.94	0.29%
SWDU25	Travel Trade Co-ops & MICE Frograms	φ	100,300.00	φ	111,017.15	φ	34,202.95	φ	4/3.54	0.2970
SMD019	Sales Market Development (HQ)	\$	60,000.00	\$	51,984.70	\$	8,013.63	\$	1.67	0.00%
	GRAND TOTAL	\$	500,000.00	\$	398,222.81	\$	101,007.22	\$	769.97	0.15%
	1	1						1		

\*Pending column includes September expenses to be paid by October 15th.



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  - a. FY2025 Q1 & Q2 Activities
- 6. ACCOUNT SUMMARY
- 7. ANNOUNCEMENTS
  - a. Next Taiwan Market Update Meeting November 7, 2024 at 11am (subject to change)
- 8. ADJOURNMENT

## TAIWAN MARKET UPDATE

# SI YU'OS MA'ÅSE'