



Republic of the Marshall Islands
Marshall Islands Visitors Authority
2003 Visitors Survey Report



Marshall Islands Visitors Authority

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FOREWORD

January 16, 2004

Yokwe jen MIVA!

In our efforts to continuously improve the acquisition and accumulation of visitor statistics for the Republic of the Marshall Islands (RMI), the Marshall Islands Visitors Authority (MIVA) recently implemented the RMI's first visitors survey while upgrading its statistics tabulation software. We are now pleased to release this *RMI 2003 Visitor Survey Findings Report*. Through technical assistance and training provided by Mr. Benjamin Graham, the MIVA is now able to produce a variety of in-depth tables and graphs, such as you will find in this document.

Over 700 surveys were filled during the months of May through July of this year at the Amata Kabua International Airport (AKIA), out of which 548 were selected based on a minimum number of questions answered by the respondent and omission of residents (over 90 days residency in RMI) who were incorrectly surveyed. The survey was conducted in English, Japanese, and Chinese languages, and provides a 10% sample of all air-bound visitors departing from the AKIA. As this was the first survey conducted, a comparative analysis of visitor trends into the RMI is not possible at this time. With future visitor surveys however, this 2003 survey will provide a baseline for such analysis into trends and preferences of visitors to the RMI.

For additional copies, questions regarding the MIVA's new statistical software, or visitor information not covered in this report, please visit our office located in Delap or contact us through our website: www.visitmarshallislands.com. The MIVA gives a special thanks to Mr. Graham, Mr. Jack Chong Gum of the Marshall Islands Airport Authority, and the individuals who devoted their time and energy into conducting this survey.

Kommol tata,



Mark Stege
General Manager

Table 1. Country of Residence

Subject	Total	Percent
Total	548	100.0
Guam	41	7.5
Australia	17	3.1
Other Pacific	81	14.8
Hawaii	54	9.9
US Mainland	144	26.3
Japan	74	13.5
Taiwan (ROC)	12	2.2
Other Asia	57	10.4
Europe	12	2.2
All Other Countries	56	10.2
Not stated	0	0.0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

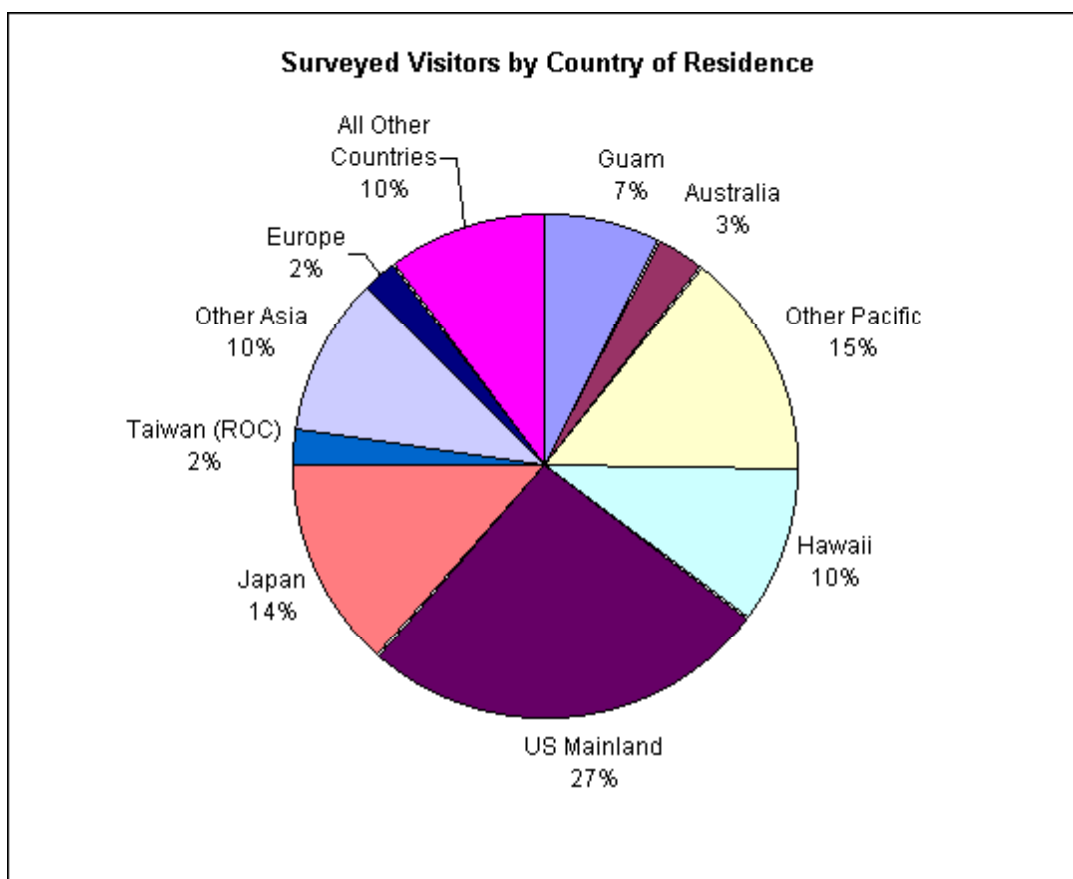


Table 1. Visitors residing in the mainland United States account for roughly one-quarter (27%) of all visitors surveyed, making up the largest single group. There are even more US resident visitors when outlying US territories/states (Hawaii and Guam) included in this group, altogether accounting for nearly half (44%) of all visitors into the RMI. Asian residents collectively account for another one-quarter (26%) of all visitors to the RMI, with Japan being the primary country of residence among them, while island nations in the Pacific accounted for 18%. The fewest visitors came from Europe.

Table 2. Age and Sex

Subject	Total	Male	Female
Total	548	330	218
10 to 19	15	3	12
20 to 29	87	44	43
30 to 39	130	76	54
40 to 49	142	87	55
50 to 59	111	70	41
60 to 69	61	49	12
70+	2	1	1

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

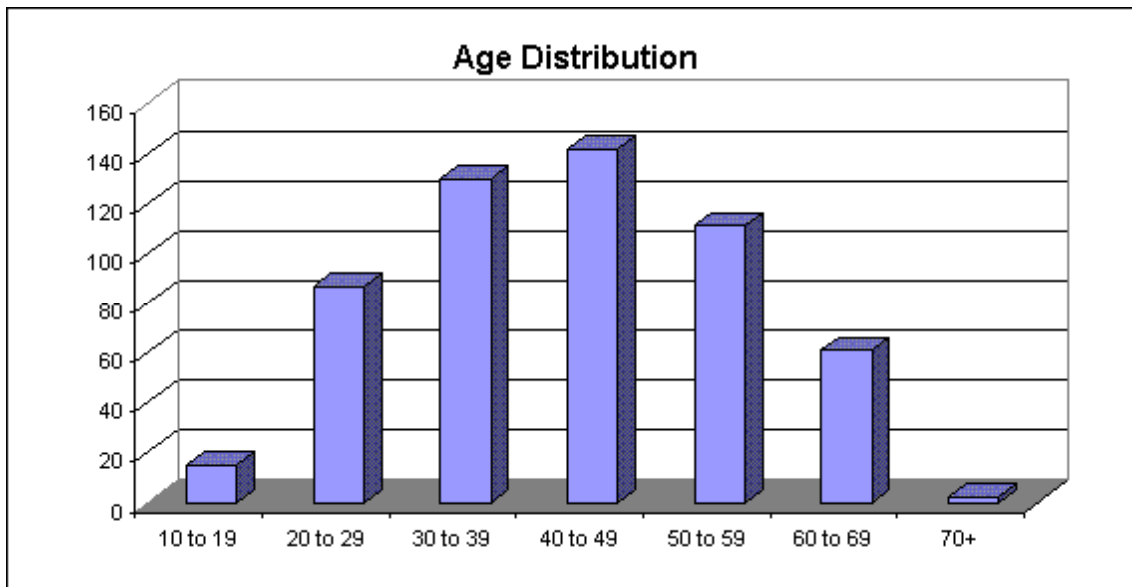


Table 2. Most visitors to the RMI are between the ages of 30-59, or “middle-aged.” Altogether such visitors account for 70% of all visitors to the RMI. This is consistent with the high cost of travel to the Marshall Islands, particularly among the holiday visitors, as middle-aged travelers tend to have a greater disposable income than travelers in their 20s. The small number of visitors under the age of twenty may indicate a related reluctance for parents to bring their dependents on trips to the RMI, again based on the high cost of travel to the RMI.

Table 3. Country by Educational Attainment

Subject	Total	None	Elementary	High School	Trade School	Some College	College Grad.	Post-Grad.	Other
Total	548	1	14	65	24	74	202	152	16
Guam	41	0	0	4	0	7	17	10	3
Australia	17	0	0	3	0	3	7	3	1
Other Pacific	81	0	2	9	5	16	31	14	4
Hawaii	54	0	4	8	0	5	16	21	0
US Mainland	144	1	1	6	3	17	56	54	6
Japan	74	0	4	13	11	13	25	8	0
Taiwan (ROC)	12	0	0	5	1	2	1	3	0
Other Asia	57	0	3	11	3	2	25	13	0
Europe	12	0	0	1	0	0	2	9	0
All Other Countries	56	0	0	5	1	9	22	17	2
Not stated	0	0	0	0	0	0	0	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 3-4. The majority of those surveyed, 65%, were college/post college graduates from the United States, Other Pacific Islands, Japan, and Other Asian countries working in professional fields. Only nine were unemployed. This again indicates a propensity for the Marshall Islands to attract travelers with higher disposable incomes.

Table 4. Country by Occupation

Subject	Total	Senior Mgn./Exec.	Middle Management	Clerical/Sales	Professional	Self Employed	Trade/Technical	Farming/Fishing	Homemaker	Military/Military Dependent	Student	Retired	Unemployed	Others
Total	548	60	76	10	152	54	28	32	6	4	44	17	9	56
Guam	41	7	3	2	11	7	3	1	0	0	0	3	0	4
Australia	17	1	2	1	4	3	1	2	0	0	1	0	0	2
Other Pacific	81	10	22	0	33	3	3	0	0	0	4	1	0	5
Hawaii	54	7	6	0	21	4	0	0	0	1	10	1	1	3
US Mainland	144	17	18	0	47	12	3	0	2	3	22	7	1	12
Japan	74	3	7	4	5	8	7	15	2	0	1	2	5	15
Taiwan (ROC)	12	3	1	0	2	2	1	1	2	0	0	0	0	0
Other Asia	57	4	8	2	8	10	7	8	0	0	3	2	0	5
Europe	12	3	0	0	5	1	0	3	0	0	0	0	0	0
All Other Countries	56	5	9	1	16	4	3	2	0	0	3	1	2	10
Not stated	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 5. Income by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total	548	41	17	81	54	144	74	12	57	12	56
N/A	2	0	0	0	0	1	0	0	0	0	1
Below 15,000	104	3	1	22	9	19	11	2	21	2	14
15,000 to 24,999	97	8	2	27	7	12	15	3	16	0	7
25,000 to 34,999	71	8	2	10	6	18	6	4	7	1	9
35,000 to 44,999	79	7	3	7	11	20	12	2	4	2	11
45,000 to 54,999	46	3	2	6	7	15	6	0	3	1	3
55,000 to 64,999	39	3	4	2	3	10	11	0	1	3	2
65,000 to 74,999	28	1	0	3	4	10	5	0	3	1	1
75,000 to 99,999	36	3	1	2	3	18	5	1	1	1	1
100,000 and over	46	5	2	2	4	21	3	0	1	1	7

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

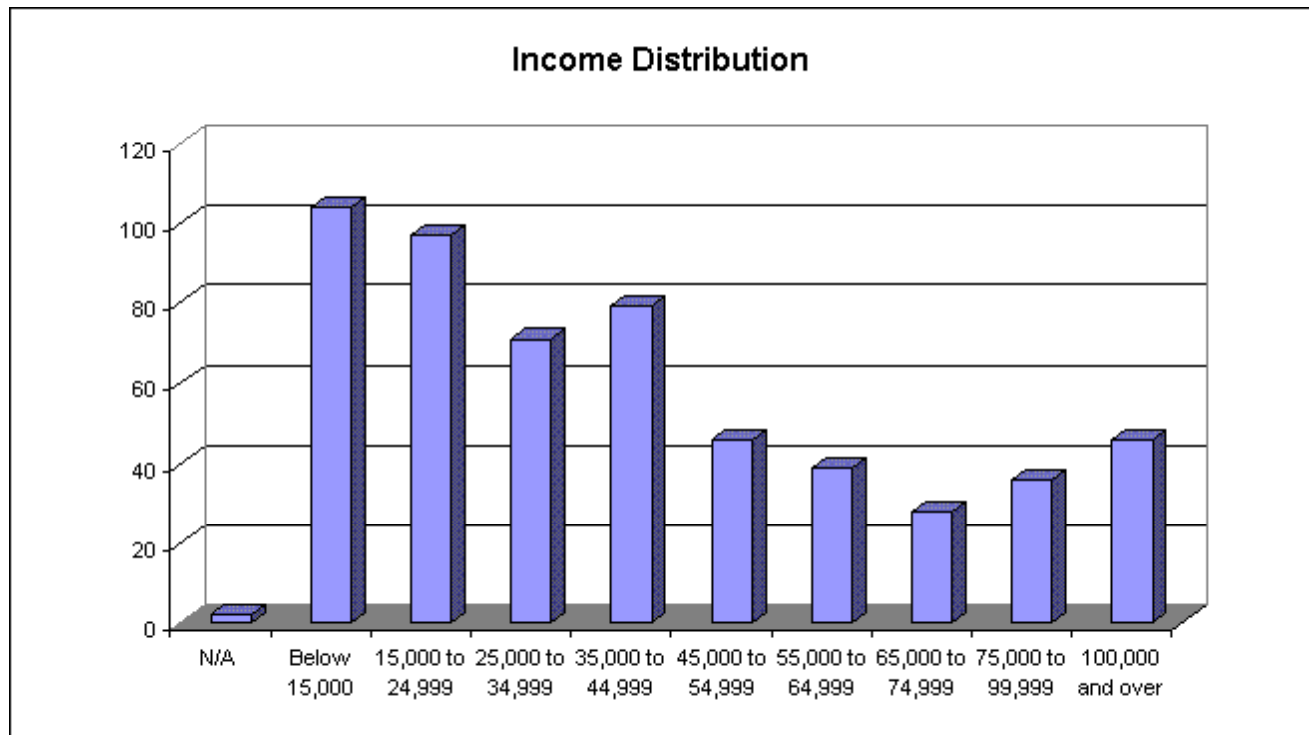


Table 5. A wide income distribution can be seen in those surveyed, with 64% of visitors having an annual income of \$44,999 or less. Among the 351 such respondents, 54% were business travelers, 16% were on vacation, and 12% were visiting friends or relatives (VFR). Those respondents who had visited for “other” purposes in this same category accounted for the remaining 20%. By comparison, among the 195 earning \$45,000 or more, 63% were business travelers, 25% were on vacation, and 8% and 6% were VFR or visiting for “other” purposes, respectively.

Table 6. Country by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
Guam	41	5	25	4	7
Australia	17	0	11	1	5
Other Pacific	81	4	58	5	14
Hawaii	54	11	33	6	4
US Mainland	144	28	83	17	16
Japan	74	38	28	2	6
Taiwan (ROC)	12	5	5	0	2
Other Asia	57	5	34	8	10
Europe	12	6	5	0	1
All Other Countries	56	3	29	9	15
Not stated	0	0	0	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

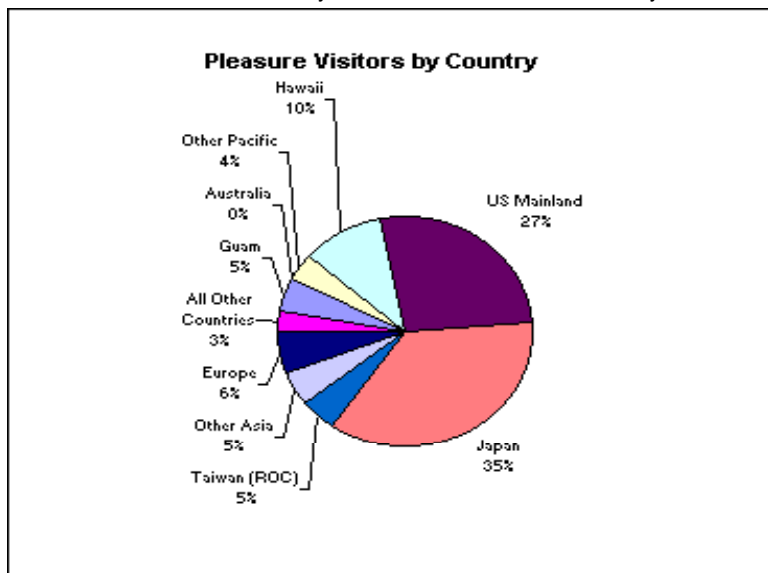


Table 6. Over 57% of respondents said they were visiting the RMI on business, while 19% said they were on vacation. “Other” travelers and VFR’s accounted for 15% and 9%, respectively. Of those visiting on vacation, the largest share (35%) was from Japan, with US mainland vacationers the second largest (27%) and Hawaii residents the third largest (10%). Among business travelers, residents of mainland US, Hawaii, and Guam collectively represent nearly half of all business travelers, though there is a fairly broad business contingent from Asian and Pacific islands countries. Given a 2-day transit time both to and from the RMI, European travelers not surprisingly accounted for the smallest share of visitors to the RMI. It is worth noting however that the majority of Europe and Japan visitors were on vacation, the only two groups with such distinction. Also noteworthy were Australian and Pacific island countries being almost exclusively business travelers.

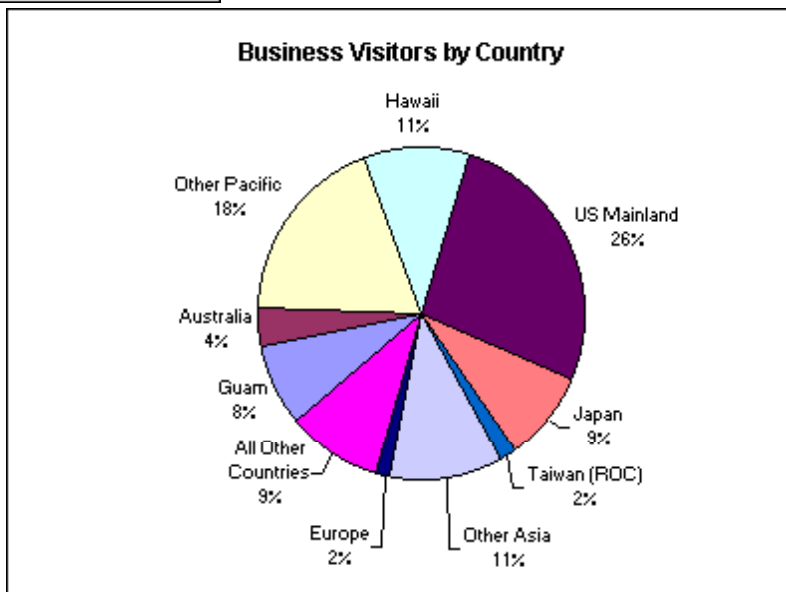


Table 7. Country by Average Length of Stay (LOS)

Subject	Visitors	Visitors Nights	Avg LOS
Total	548	4866	8.9
Guam	41	224	5.5
Australia	17	113	6.6
Other Pacific	81	587	7.2
Hawaii	54	620	11.5
US Mainland	144	1778	12.3
Japan	74	369	5.0
Taiwan (ROC)	12	76	6.3
Other Asia	57	391	6.9
Europe	12	74	6.2
All Other Countries	56	634	11.3
Not stated	0	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

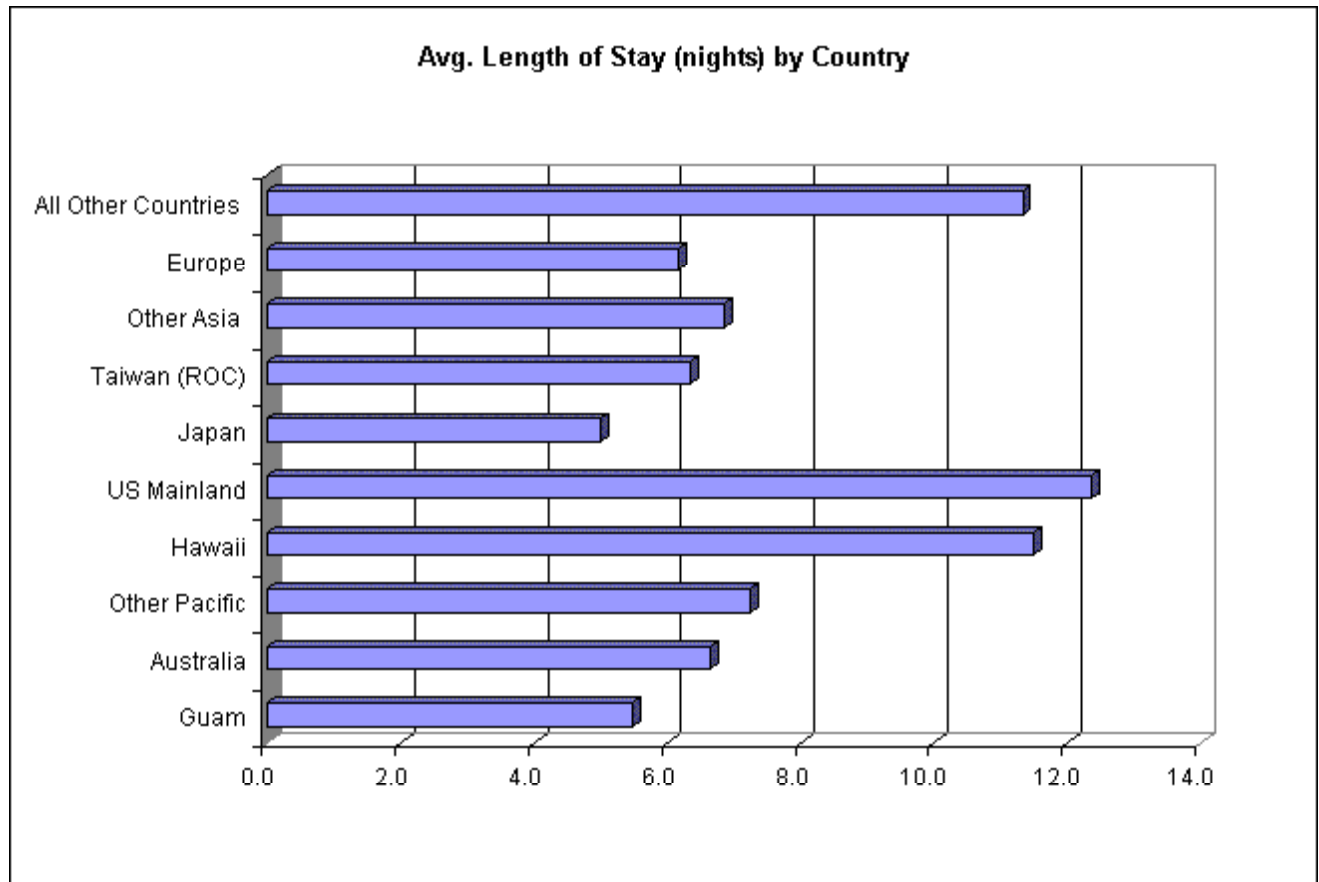


Table 7-8. The average length of stay among visitors to the RMI was 8.9 nights, altogether accounting for 4866 visitor nights, with VFR visitors staying the longest at 10.2 nights and vacationers staying the shortest at 7.5 nights. By residence, US mainland residents had the longest length of stay at 12.3 nights, Hawaii residents were second with 11.5 nights. Japanese residents, most of whom are vacationers, had the shortest length of stay at 5 nights.

Table 8. Purpose of Visit by Avg LOS

Subject	Visitors	Visitors Nights	Avg LOS
Total	548	4866	8.9
Pleasure	105	790	7.5
Business	311	2783	8.9
VFRs	52	532	10.2
Other	80	761	9.5

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 9. Number of Visits to RMI by Purpose of Visit

Subject	Total	Percent	Pleasure	Percent	Business	VFRs	Other
Total	548	100.0	105	100	311	52	80
1	294	53.6	71	67.6	157	30	36
2	80	14.6	9	8.6	47	8	16
3	35	6.4	5	4.8	22	3	5
4	31	5.7	2	1.9	21	3	5
5	16	2.9	2	1.9	7	2	5
6+	77	14.1	15	14.3	50	5	7
N/A	15	2.7	1	1.0	7	1	6

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 9. While over half of visitors surveyed were making their first visit to the RMI, a considerable share (32%) of visitors were making their 3rd or more visit. Vacationers, particularly, show a “repeater” trend with 14% having visited 6 times or more, as did those visiting friends and relatives with 58% making their second visit.

Table 10. Country by Accommodation

Subject	Total	Hotel	Friends	Apt.	Camping	Home Stay	Other
Total	548	396	58	38	0	26	30
Guam	41	33	5	1	0	2	0
Australia	17	15	1	1	0	0	0
Other Pacific Island	81	66	4	2	0	4	5
Hawaii	54	36	8	3	0	4	3
US Mainland	144	96	21	16	0	3	8
Japan	74	65	1	2	0	1	5
Taiwan (ROC)	12	11	1	0	0	0	0
Other Asia	57	28	7	11	0	9	2
Europe	12	10	1	0	0	0	1
All Other Countries	56	36	9	2	0	3	6
Not stated	0	0	0	0	0	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 11. Purpose of Visit by Accommodation

Subject	Total	Hotel	Friends	Apt.	Camping	Home Stay	Other
Total	548	396	58	38	0	26	30
Pleasure	105	89	7	7	0	1	1
Business	311	251	19	18	0	13	10
VFRs	52	12	22	7	0	8	3
Other	80	44	10	6	0	4	16

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 10/11. The majority of visitors (72%) stayed in a hotel, while staying over with friends was the second highest selection among visitors for all categories of visitor, particularly among residents of the US mainland (15%), Hawaii (15%), and Other Asian Countries (12%). It is likely that the latter may actually be undervalued as nine respondents indicated they had “home stay” accommodations, i.e. with a host Marshallese family, which may have been misinterpreted as staying with personal friends. And despite an average length of stay among respondents of 8.9 nights, 7% said they had stayed in apartments, 11% of which were US residents.

Table 12. Source of Info. On RMI by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries	Not stated
Friends/Relatives	218	13	4	39	20	64	21	7	26	2	22	0
Travel Agents	93	6	2	18	5	26	8	5	8	3	12	0
Magazine Ad	31	2	1	7	1	8	9	1	0	1	1	0
Website	80	7	5	7	3	21	14	1	10	4	8	0
Magazine Article	23	0	0	0	0	4	18	0	0	0	1	0
Newspaper	13	0	1	0	1	3	2	1	5	0	0	0
Tourism Shows	6	0	0	2	1	0	2	0	0	1	0	0
Other	236	22	8	40	33	59	24	1	18	5	26	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 13. Source of Info. On RMI by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Friends/Relatives	218	44	117	32	25
Travel Agents	93	12	58	8	15
Magazine Ad	31	10	18	2	1
Website	80	23	30	13	14
Magazine Article	23	18	5	0	0
Newspaper	13	2	9	0	2
Tourism Shows	6	1	5	0	0
Other	236	20	164	12	40

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 12-14. Many visitors (40%) said they had received their information from Friends/Relatives, followed by Travel Agents (17%) and the Internet (15%). Among Pleasure travelers, Friends/Relatives were the primary source of information for visitors from Hawaii and the U.S. Mainland, while this same category was second only to Magazines among Japanese. Despite Tourism Shows receiving a low 1% among respondents, it is important to note that such shows are in many cases catered to the travel trade as opposed to the travel consumer. Multiple responses were allowed.

Table 14. Source of Info. On RMI by Country for Pleasure Visitors

Subject	Total	Guam	Australia	Other Pacific Island	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries	Not stated
Friends/Relatives	44	2	0	3	6	14	11	2	3	1	2	0
Travel Agents	12	0	0	0	1	2	4	2	1	2	0	0
Magazine Ad	10	0	0	0	0	0	8	1	0	1	0	0
Website	23	1	0	1	1	4	12	1	1	2	0	0
Magazine Article	18	0	0	0	0	2	15	0	0	0	1	0
Newspaper	2	0	0	0	0	2	0	0	0	0	0	0
Tourism Shows	1	0	0	0	0	0	0	0	0	1	0	0
Other	20	2	0	0	4	7	3	0	1	3	0	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 15. Traveling Party by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
N/A	2	0	2	0	0
Alone	324	37	208	33	46
With Spouse/partner	64	34	20	4	6
With Friend(s)	78	25	33	6	14
With Family Members	19	5	6	3	5
With Organized Tour Group	61	4	42	6	9

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 15. Out of every three Business travelers surveyed, two said they were traveling alone. More VFR visitors also tended to travel alone than with a companion. By comparison, Pleasure travelers tended to travel more with a companion, usually with their Spouse/partner and Friend(s).

Table 16. Travel Arrangement by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
Own travel arrangements	286	51	164	30	41
Through travel agent/tour operator	262	54	147	22	39

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 17. Travel Arrangements by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries	Not stated
Total	548	41	17	81	54	144	74	12	57	12	56	0
Own travel arrangements	286	20	7	46	29	83	25	8	35	7	26	0
Through travel agent/tour operator	262	21	10	35	25	61	49	4	22	5	30	0

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 16-17. Although slightly more Business and VFR visitors had made their own travel arrangements over Pleasure visitors, for the most part all groups of travelers show an equal distribution of travelers whom had either made their own travel arrangements or made them through a travel agent/tour operator. This relatively high proportion of travelers making their own travel arrangements is a distinct feature of travel to the RMI, due likely to low awareness levels among travel agents of the Marshall Islands as a travel destination, save for Japan. Indeed, Japanese formed the only group where visitors whom had made travel arrangements though a travel agent/tour operator outnumbered those whom had made their own travel arrangements.

Table 18. Room Services Rating by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
N/A	44	9	16	8	11
Above Average	114	24	73	5	12
Average	345	67	196	32	50
Below Average	45	5	26	7	7

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 19. Other Services (tours, etc.) Rating by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
N/A	188	17	137	12	22
Above Average	88	37	29	6	16
Average	238	42	132	29	35
Below Average	34	9	13	5	7

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 20. Employee Attitude Rating by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
N/A	21	1	10	7	3
Above Average	138	32	81	7	18
Average	332	60	194	30	48
Below Average	57	12	26	8	11

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 21. Meals and Drinks Rating by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total	548	105	311	52	80
N/A	19	2	11	4	2
Above Average	165	24	111	9	21
Average	321	70	170	32	49
Below Average	43	9	19	7	8

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Tables 18-21. Of all visitors surveyed, 57% gave an “average” rating, 26% an “above average” rating, and 10% “below average” rating for Room Services, Other Services, Employee Attitude, and Food and Beverage Services, combined. By category of visitor, 23% of both Pleasure and Business visitors said Room Service was “above average,” as did about 30% regarding Employee Attitude, respectively. Meals and Drinks were thought “above average” by 36% of Business travelers compared to 23% of Pleasure visitors. And among Pleasure visitors who used Other Services (tours, etc.), 42% felt these services were “above average” while 10% felt they were “below average.”

Table 22. Estimated Occupants Per Hotel Room

Subject	Total
Total Questionnaires	548
Total Visitors Covered	668
Occupants Per Room	1.2

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 22-23. As visitors traveling together were allowed to fill out a single questionnaire, within the 548 surveys completed 668 visitors were accounted. Similarly, it is estimated that the average occupancy per room among visitors to the RMI was 1.2 persons. It can be further estimated that visitor accommodation expenditures among survey respondents alone totaled \$430,514.00, the biggest expenditure category by visitors surveyed. Australians had by far the highest per capita expenditure at nearly \$75/night, followed by visitors from Guam and next, Japan. Visitors from Hawaii and the US mainland spent the least on accommodations, influenced in part by 15% of each respectively finding accommodations with friends during their visit (see Table 10).

Table 23. Lodging Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific Island	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	215257	14602	10000	31788	19300	68303	21209	2935	17170	3650	26300
Mean Daily Expenditure	44.24	65.19	88.50	54.15	31.13	38.42	57.48	38.62	43.91	49.32	41.48
Estimated Occupants/Room	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2
Estimated Daily Expenditure	36.86	54.32	73.75	45.13	25.94	32.01	47.90	32.18	36.59	41.10	34.57

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

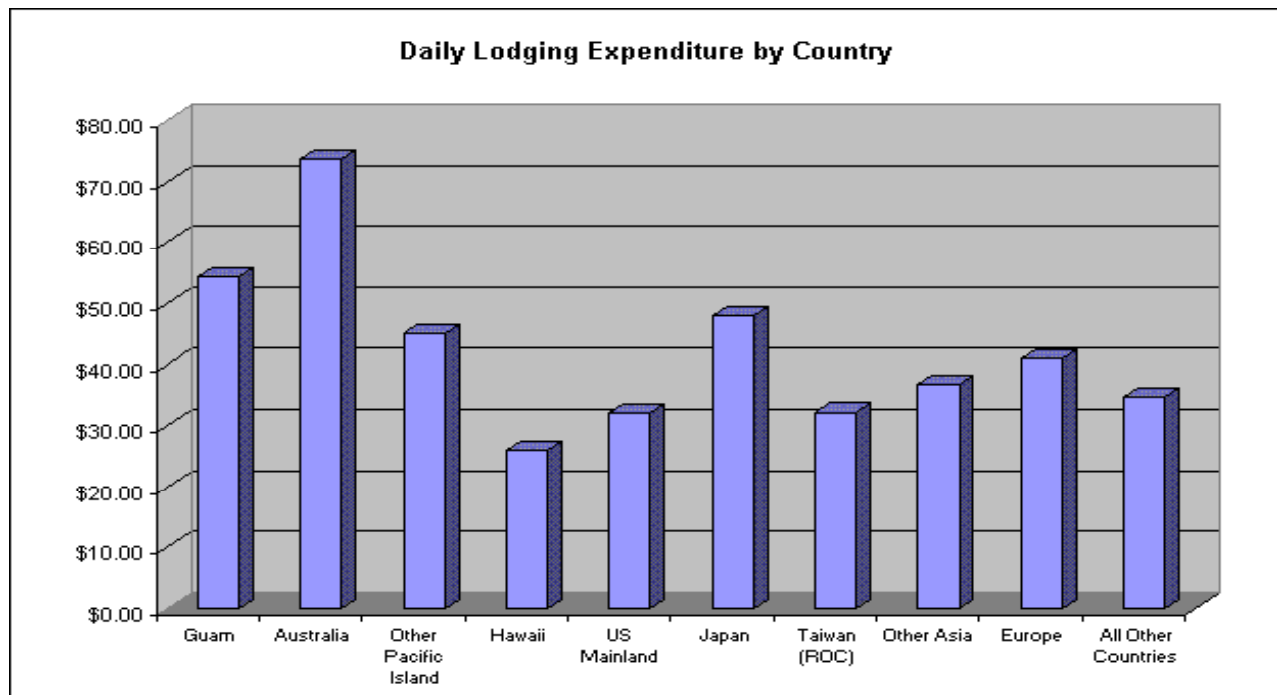


Table 24. Lodging Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	215257	36235	144917	8035	26070
Mean Daily Expenditure	44.24	45.87	52.07	15.10	34.26
Estimated Occupants/Room	1.2	1.2	1.2	1.2	1.2
Estimated Daily Expenditure	36.86	38.22	43.39	12.59	28.55

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

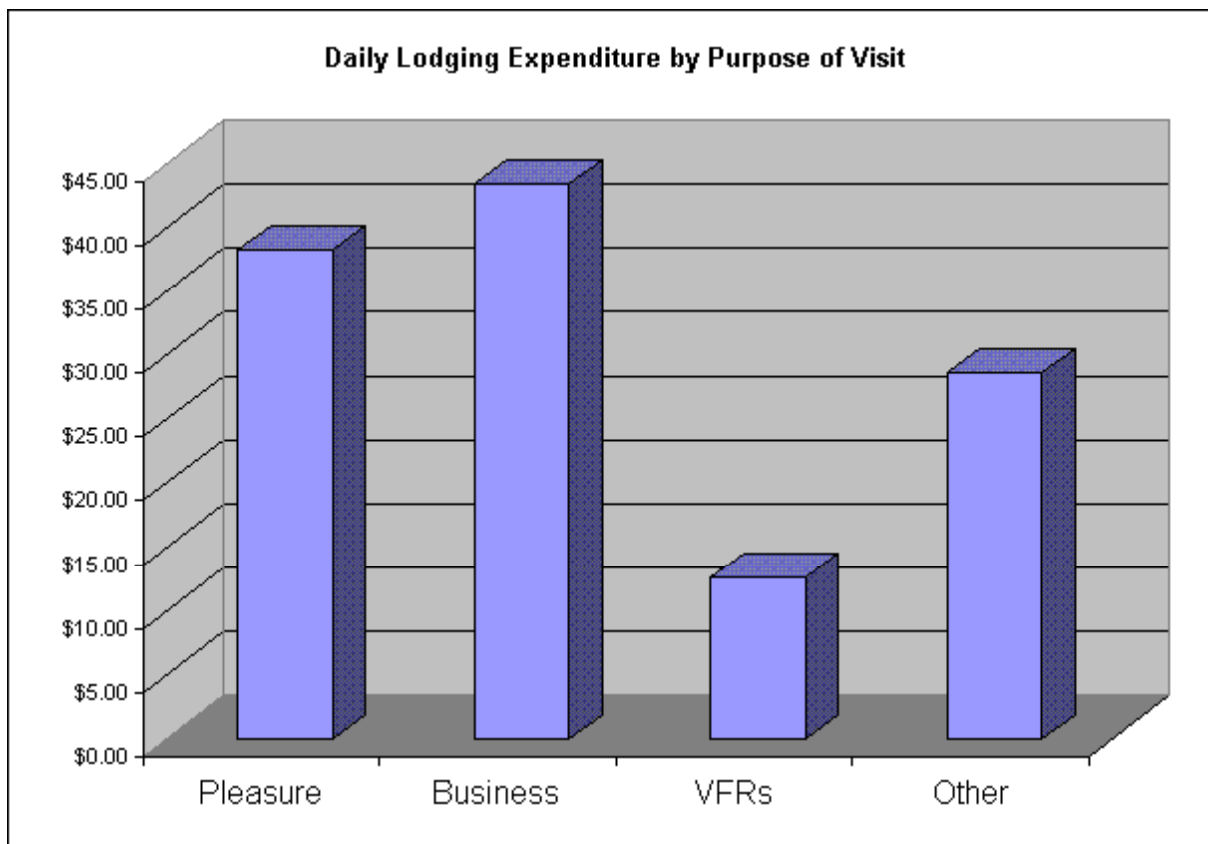


Table 25. Taxi or Bus Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	2124	20	95	125	420	314	801	5	101	39	204
Estimated Daily Expenditure	0.44	0.09	0.84	0.21	0.68	0.18	2.17	0.07	0.26	0.53	0.32

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 26. Taxi or Bus Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	2124	854	849	163	258
Estimated Daily Expenditure	0.44	1.08	0.31	0.31	0.34

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 25-26. Among respondents, Japanese took advantage the most of taxi/bus services at \$2.17 per visitor, as did Pleasure visitors in general at \$1.08 per visitor.

Table 27. Tour Activities Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	8654	602	0	2387	146	2533	2551	0	0	100	335
Estimated Daily Expenditure	1.78	2.69	0.00	4.07	0.24	1.42	6.91	0.00	0.00	1.35	0.53

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 28. Tour Activities Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	8654	4976	1569	53	2056
Estimated Daily Expenditure	1.78	6.30	0.56	0.10	2.70

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 27-28. Among respondents, Japanese experienced RMI tourism facilities the most at \$6.91 per visitor, as did Pleasure visitors and those visiting our islands for Other purposes in general at \$6.30 and \$2.70 per visitor, respectively.

Table 29. Rental Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	20611	1588	630	2765	3050	5080	1090	0	2410	445	3553
Estimated Daily Expenditure	4.24	7.09	5.58	4.71	4.92	2.86	2.95	0.00	6.16	6.01	5.60

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 29-30. A considerable number of respondents said they had rented cars during their stay in the RMI. Visitors from Guam, Australia, Other Asia, and Europe were particularly represented in this category, with Guam being the highest at \$7.09. By purpose of visit, Business travelers rented cars the most followed by VFR visitors.

Table 30. Rental Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	20611	1265	15253	2003	2090
Estimated Daily Expenditure	4.24	1.60	5.48	3.77	2.75

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 31. Food and Drink Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	79269	5605	3430	10241	10654	24465	7995	1145	5355	1860	8519
Estimated Daily Expenditure	16.29	25.02	30.35	17.45	17.18	13.76	21.67	15.07	13.70	25.14	13.44

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 31-32. Among respondents, visitors from Australia had the highest per capita expenditure on Food and Drink, followed by visitors from Guam and Europe. Expenditures on Food and Drink among respondents was second only to Accommodations.

Table 32. Food and Drink Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitors Days	4866	790	2783	532	761
Total Expenditure	79269	14043	50347	5984	8895
Estimated Daily Expenditure	16.29	17.78	18.09	11.25	11.69

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 33. Entertainment Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	18014	550	600	2000	3625	2221	5620	100	1095	305	1898
Estimated Daily Expenditure	3.70	2.46	5.31	3.41	5.85	1.25	15.23	1.32	2.80	4.12	2.99

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 34. Entertainment Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	18014	8251	6693	950	2120
Estimated Daily Expenditure	3.70	10.44	2.40	1.79	2.79

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 33-34. Possibly due to the interpretation of Tour Activities as Entertainment, Japanese by far for the highest per capita expenditure on Entertainment at \$15.23. Pleasure visitors, as would be expected, accounted for the highest per capita expenditure in this category at \$10.44 per visitor by purpose of visit.

Table 35. Handicraft Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	13391	820	330	2905	2595	3718	1183	100	355	425	960
Estimated Daily Expenditure	2.75	3.66	2.92	4.95	4.19	2.09	3.21	1.32	0.91	5.74	1.51

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 36. Handicraft Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	13391	1925	7904	1455	2107
Estimated Daily Expenditure	2.75	2.44	2.84	2.73	2.77

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 35-36. European and Hawaii residents accounted for the highest per capita expenditure for handicrafts at \$5.71 and \$4.19, respectively. Handicraft expenditures per visitor by purpose of visit were relatively alike at an average of \$2.75.

Table 37. Miscellaneous Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	13860	750	0	1610	1350	5415	1160	210	1420	210	1735
Estimated Daily Expenditure	2.85	3.35	0.00	2.74	2.18	3.05	3.14	2.76	3.63	2.84	2.74

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 37-38. The average expenditure on Miscellaneous items was \$2.85 per respondent, with Other Asian, Guam, and US Mainland residents being the only groups which spent over \$3.00 in this category. Pleasure and Business travelers likewise were the only two groups by purpose of visit, which expended over \$3.00.

Table 38. Miscellaneous Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	13860	2730	9000	1030	1100
Estimated Daily Expenditure	2.85	3.46	3.23	1.94	1.45

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 39. Others Expenditure by Country

Subject	Total	Guam	Australia	Other Pacific	Hawaii	US Mainland	Japan	Taiwan (ROC)	Other Asia	Europe	All Other Countries
Total Visitor Days	4866	224	113	587	620	1778	369	76	391	74	634
Total Expenditure	23498	940	515	5660	850	6658	3290	280	3420	70	1815
Estimated Daily Expenditure	4.83	4.20	4.56	9.64	1.37	3.74	8.92	3.68	8.75	0.95	2.86

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 40. Others Expenditure by Purpose of Visit

Subject	Total	Pleasure	Business	VFRs	Other
Total Visitor Days	4866	790	2783	532	761
Total Expenditure	23498	6898	13470	1250	1880
Estimated Daily Expenditure	4.83	8.73	4.84	2.35	2.47

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 39-40. The average expenditure on Other items was \$4.83 per respondent, with Other Pacific and Japan resident expending \$9.64 and \$8.75, respectively. Pleasure travelers likewise were the only groups by purpose of visit, which exceeded \$8.00 in expenditures in this category.

Table 41. Estimates of Total Annual Visitor Expenditure: 2002

Subject	Pleasure	Business	VFR*	Other
A. ARRIVALS (IN 2002)	1445	2165	763	1629
B. TOTAL AVG DAILY EXP (2003)	90.05	81.14	36.83	55.51
Lodging	38.22	43.39	12.59	28.55
Taxi or bus	1.08	0.31	0.31	0.34
Tours	6.30	0.56	0.10	2.70
Rental	1.60	5.48	3.77	2.75
Food & drink	17.78	18.09	11.25	11.69
Entertainment	10.44	2.40	1.79	2.79
Handicrafts	2.44	2.84	2.73	2.77
Misc.	3.46	3.23	1.94	1.45
Others	8.73	4.84	2.35	2.47
C. AVERAGE LENGTH OF STAY	7.52	8.95	10.23	9.51
Est. Annual Expenditure (A x B x C)	\$ 978,519	\$ 1,572,229	\$ 287,476	\$ 859,949
TOTAL ANNUAL VISITOR EXPEND	\$ 3,698,174			

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

* VFR means "visiting friends or relatives"

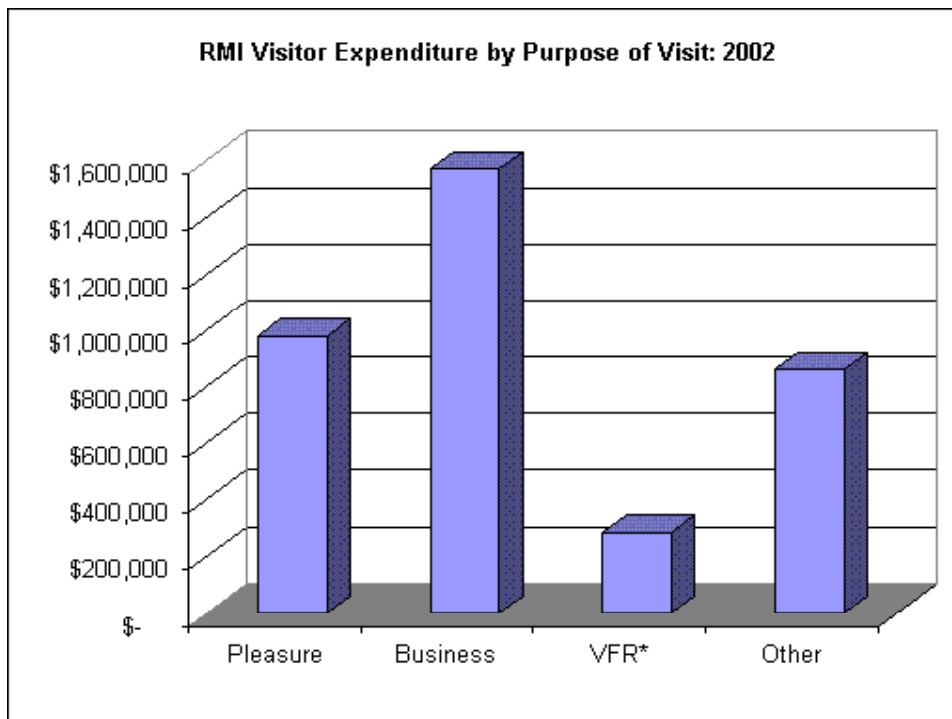


Table 41. After calculating and combining the nine different categories of expenditure covered in this survey (Accommodations, Taxi/bus, Tours, Auto Rentals, Food and drink, Entertainment, Handicrafts, Miscellaneous, and Other), we are able to deduce that Pleasure visitors had the greatest per capita daily expenditure at \$90.05, followed by Business visitors at \$81.14. The VFR visitor spent on average \$36.83 per day, while those visiting for Other purposes showed an average daily expenditure of \$55.51.

These amounts provide a reliable basis from which to calculate annual visitor expenditures as well. Given visitor arrivals over the course of 2002, for instance, we can estimate by multiplying the average daily expenditure of \$65.88 per respondent and average length of stay by total visitor arrivals that visitors to the RMI expended just under \$3.7 million in 2002.

Table 42. Most Liked About RMI

Subject	Total	Percent
Total	548	100
N/A	117	21.4
People	228	41.6
Diving/Snorkeling	65	11.9
Scenery	48	8.8
Food/Sea Food	5	0.9
Weather	16	2.9
History/Culture	35	6.4
Fishing	4	0.7
Handicrafts	4	0.7
All Others	26	4.7

Source: Marshall Islands Visitors Authority Survey, 2003

Table 43. Least Liked About RMI

Subject	Total	Percent
Total	548	100
N/A	240	43.8
Litter/Pollution	88	16.1
Rainy/Humid/Hot Weather	75	13.7
Urbanized	7	1.3
Foreign Influence	6	1.1
Airport/Airport Services	24	4.4
Phone & Internet	6	1.1
Alcoholism	5	0.9
Customer Service	26	4.7
Public Restrooms	6	1.1
Lack of activities	7	1.3
All others	58	10.6

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 44. Overall Experience (1 Highest and 5 Lowest)

Subject	Total	Percent
Total	548	100
1	69	12.6
2	150	27.4
3	179	32.7
4	113	20.6
5	37	6.8

Source: RMI 2003 Visitors Survey, Marshall Islands Visitors Authority

Table 42-44. Of those who responded to what they liked the least about the Marshall Islands, 36% said pollution and Majuro’s “construction site” appearance. Similarly, and despite recent renovations to the Majuro airport, 10% of respondents still felt that it was disorganized and complained of standing in line too long. Several of them specified that lines at the immigration counter on arrival and the check in counter upon departure were particularly slow. Another 10% commented on the poor quality of service throughout, while an overwhelming number of respondents, over 50%, said that they like the “friendly people” most of all in the Marshall Islands. Other favorites among visitors were diving and snorkeling and culture at 16% and 8%, respectively, while a combined 15% said they liked the weather and atoll scenery the best.

And lastly, 73% gave their Overall Experience rating a “3” or lower, an indication that visitors tended to be slightly more negative than positive regarding their experience in the Marshall Islands. Pleasure visitors were more evenly split.

APPENDIX

2003 RMI VISITORS SURVEY
MARSHALL ISLANDS VISITORS AUTHORITY (MIVA)

<p>1. Four-digit Survey ID # <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/></p>	<p>3. Sex <input style="float: right; width: 30px; height: 20px;" type="checkbox"/> 1. Male 2. Female</p>																		
<p>2. Today's Date <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/> MM DD YY</p>	<p>4. Age <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/></p>																		
<p>5. Country/area of Usual Residence <input style="width: 40px; height: 20px;" type="text"/></p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;">1. Guam</td> <td style="width: 50%;">10. Taiwan (ROC)</td> </tr> <tr> <td>2. Australia</td> <td>11. Hong Kong</td> </tr> <tr> <td>3. New Zealand</td> <td>12. Philippines</td> </tr> <tr> <td>4. Other Pacific Island</td> <td>13. Other Asia</td> </tr> <tr> <td>5. Hawaii</td> <td>14. UK</td> </tr> <tr> <td>6. US Mainland</td> <td>15. Germany</td> </tr> <tr> <td>7. Japan</td> <td>16. France</td> </tr> <tr> <td>8. China (PROC)</td> <td>17. Other Europe</td> </tr> <tr> <td>9. Korea</td> <td>18. All other countries/areas</td> </tr> </table>	1. Guam	10. Taiwan (ROC)	2. Australia	11. Hong Kong	3. New Zealand	12. Philippines	4. Other Pacific Island	13. Other Asia	5. Hawaii	14. UK	6. US Mainland	15. Germany	7. Japan	16. France	8. China (PROC)	17. Other Europe	9. Korea	18. All other countries/areas	<p>6. Educational Attainment (highest level achieved) <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. None 2. Elementary/primary 3. High School/secondary 4. Trade School 5. Some College but no degree 6. College Graduate (Associate or Bachelor levels) 7. College Post-Graduate (Master or higher levels) 8. Other
1. Guam	10. Taiwan (ROC)																		
2. Australia	11. Hong Kong																		
3. New Zealand	12. Philippines																		
4. Other Pacific Island	13. Other Asia																		
5. Hawaii	14. UK																		
6. US Mainland	15. Germany																		
7. Japan	16. France																		
8. China (PROC)	17. Other Europe																		
9. Korea	18. All other countries/areas																		
<p>7. Primary Occupation <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Senior Management/Executive 2. Middle Management 3. Clerical /Sales 4. Professional (Doctor, Lawyer, Teacher etc.) 5. Business Owner/Self Employed 6. Trade/Technical (Electrician, Plumber, etc) 7. Farming/Fishing 8. Homemaker 9. Military/Military Dependent 10. Student 11. Retired 12. Unemployed 13. All other occupations 	<p>8. Annual Total Income (in US \$\$ or equivalent) <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Below 15,000 2. 15,000 to 24,999 3. 25,000 to 34,999 4. 35,000 to 44,999 5. 45,000 to 54,999 6. 55,000 to 64,999 7. 65,000 to 74,999 8. 75,000 to 99,999 9. 100,000 and over 																		
<p>9. Primary Purpose of Visit to the RMI <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Pleasure, holiday, vacation (must answer #10) 2. Business or work-related (skip to #11) 3. Visiting Friends and Relatives (skip to #11) 4. Other (skip to #11) 	<p>10. If Visiting for Pleasure, Holiday, Vacation, What was Primary Activity in RMI <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Diving 2. Sport Fishing 3. Culture/history 4. Honeymoon 5. Other 																		
<p>11. Length of Stay in the RMI (nights) <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/></p>	<p>12. Number of Visits to the RMI, (including this visit) <input style="width: 40px; height: 20px;" type="text"/> <input style="width: 40px; height: 20px;" type="text"/></p>																		
<p>13. Accommodation While on Majuro <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Hotel (must answer #14) 2. With Friends/Relatives (skip to #15) 3. Apartment (skip to #15) 4. Camping (skip to #15) 5. Home Stay (skip to #15) 6. Other (skip to #15) 	<p>14. If stayed in Hotel, Which Hotel <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Outrigger MI Resort 2. RRE Hotel 3. Hotel Marshall Islands 4. Royal Garden Hotel 5. Long Island Hotel 6. Flame Tree Backpackers 																		
<p>15. Did you Visit Any Other Atolls in RMI <input style="float: right; width: 30px; height: 20px;" type="checkbox"/></p> <ol style="list-style-type: none"> 1. Yes (must answer #16 and #17) 2. No (skip to #18) 	<p>16. If Visited Other Atolls, Which One(s)</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 																		

17. Accommodation in the Outer Atolls

[] 1. Hotel [] 4. With Friends/Relatives
 [] 2. Apartment [] 5. Camping
 [] 3. Home Stay [] 6. Other

18. Other Destination Visited for More than One Night Immediately BEFORE RMI

1. Hawaii	8. Kosrae
2. Guam	9. Fiji
3. CNMI	10. Tuvalu
4. Palau	11. Kiribati
5. Yap	12. Other
6. Chuuk	13. None
7. Pohnpei	

19. Other Destination Visiting for More than One Night Immediately AFTER RMI

1. Hawaii	8. Kosrae
2. Guam	9. Fiji
3. CNMI	10. Tuvalu
4. Palau	11. Kiribati
5. Yap	12. Other
6. Chuuk	13. None
7. Pohnpei	

20. How did you Find Out About the RMI
 Check one or more options

[] From Friends/Relatives
 [] Travel Agents
 [] Magazine Ad
 [] Web Site
 [] Magazine Article
 [] Newspaper
 [] Tourism Trade Shows
 [] Other

21. Are you Traveling

1. Alone
 2. With Spouse/partner
 3. With Friend(s)
 4. With Family Members
 5. With Organized Tour Group

22. How did you Make your Travel Arrangements

1. Make your own travel arrangements
 2. Through Travel Agent/Tour Operator

23. How would you Rate these Services (if applicable)

1 = Above Average 2 = Average 3 = Below Average

Hotel Room Cleanliness/Room Service	1 --- 2 --- 3
Restaurant and Bar Meals and Drinks	1 --- 2 --- 3
Overall Employee Service and Attitude	1 --- 2 --- 3
Other Services (Dive, Fish, Kayak Tours)	1 --- 2 --- 3

24. How Much Spent in the RMI on

Accommodation	_____
Food and drink	_____
Entertainment	_____
Tours	_____
Taxi/bus	_____
Rental car	_____
Handicrafts	_____
Miscellaneous	_____
Others	_____

25. What did you like MOST about the RMI

26. What did you like LEAST about the RMI

27. On a scale of 1 to 5 (1 highest and 5 lowest) Rate Overall Experience in the RMI

1-----2-----3-----4-----5

28. How Many People Covered by this Survey Form

29. Other comments you would like to express about your visit to the RMI (not elsewhere covered)