

**PALAU TOURISM
ECONOMIC VALUATION
SURVEY**

2004

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Bureau of Budget and Planning
Ministry of Finance
Koror, Republic of Palau*

INTRODUCTION

In January 2003, a meeting was held at the Palau International Coral Reef Center (PICRC), which was hosted by the Office of Environmental Response and Coordination with World Bank Technical Assistance consultant Mr. Herman Cesar and World Bank Senior Economist Ms. Sofia Bettencourt. The meeting was held to introduce the concept of Economic Valuation of the Natural Resources. It also assessed the existing data and identifying data gaps needed to facilitate the economic valuation process.

“Economic valuation can help to ensure that natural resources are properly taken into account in public decision making and that financial resource, both locally and globally, are made available for their management and conservation. In addition, economic valuation enables the assessment of monetary losses to the economy when natural resources are damaged as a result of human activities.”

“The goods and services that natural resources provide to mankind each have their associated net economic benefits. The value of the sum of compatible uses of these goods and services form the Total Economic Value of natural resources.”

During the meeting, actual values were identified by the participants that were to be included in the Palau study on the economic value of coastal resources. These include Fisheries, Tourism, Traditional Use, Research, Mangrove Use, Coastal Protection, Bio-prospecting, and Global Biodiversity Values. The 2004 Palau Tourism Economic Valuation Survey was undertaken to collect information needed to calculate the Tourism Value of the Economic Valuation of natural resources in Palau.

QUESTIONNAIRE DESIGN

The questionnaire underwent several versions on its way to the current form. Each version was tested in the office as hothouse, and in the field. As the questionnaire became final, its current form took shape. Herman Cesar, consultant of World Bank, David Hinchley and Andrew Drumm of The Nature Conservancy, and Casmir Remengesau and Kyonori Tellames of the Bureau of Budget and Planning designed and edited the final questionnaire into its current form. The questionnaire was designed as a pilot to capture the data needed for the economic valuation. Because the majority of tourists come from Japan and Taiwan, the Questionnaire was translated into Japanese by Mrs. Nobuko Ito and into Chinese by Mr. Alfred Fung. Approximately half of the respondents in the pilot survey used the Japanese and Chinese questionnaires. As we evaluate the results of the surveys in the different languages, we will also decide whether the current order and distribution of items works effectively in these other languages. The English version of the questionnaire appears in Appendix B.

METHODOLOGY

The survey was carried out at the airport before departures. In February, when we were testing the question, we had the good fortune of having regular Japan Airlines charter flights; it is not clear whether these flights are continuous throughout the year, so while they allow us to see the responses of the Japanese tourists on these flights, at some point, it may be necessary to analyze how much emphasis should be given to their responses for various types of future planning. In addition to these flights, Continental Airlines flies daily to Guam and twice weekly to Manila, providing the most service. Finally, Far Eastern Airlines has twice weekly flights to Taiwan, with most tourists coming on one flight and returning on the next flight. Hence, four routes – one from Japan Airlines, one from Far Eastern, and two from Continental, had to be covered to get a full picture of visitors in Palau.

For the pilot, we decided to collect 50 questionnaires for each route to try and capture the visitors' experiences and their various expenses with respect to their current residences. For each flight, full-time staff members from the Office of Planning and Statistics interviewed all participants in the survey, establishing a level of quality that could be maintained in the regular survey, assuming similar circumstances. It is important to note that the questionnaires were administered at check-in, and in most cases were self-enumerated – the visitors filled out the form, and the OPS staff went into the departure lounge to pick them up, and verify completion.

As the final survey takes place, we will have to determine the best method of obtaining larger numbers of forms since it is impossible to individually administer each questionnaire due to the short time between check-in and boarding. In most cases the visitors were cooperative, and in some cases, they really became involved and wanted to discuss their responses in detail. In order to capture more of the tourists, say capture all the tourists for a week, it would be helpful to use the immigration officials, through a directive or executive order, so the forms could go directly to the check-in counters, the passengers would fill them, and immigration could pick them up and return them to OPS for processing. As will be seen in the results section below, the results of the pilot certainly warrant consideration of a much larger sample to refine what is clearly useful information for planning in the visitor industry.

Two hundred questionnaires were collected in this manner – 50 from each of the four routes. The pilot was planned to collect exactly 50 questionnaires from each of the flights so as not to skew the data – so, as a result, each of the flights carries equal weight in the final information.

After the questionnaires were collected, they were brought to the Office of Planning and Statistics for coding and keying. They were coded and keyed using a US Bureau of the Census computer package called CPro. Palau was very fortunate to have on-island, Dr. Michael J. Levin of the US Census Bureau's International Programs Center to process the survey in IMPS, an earlier version of CPro. Since the data were edited before keying, we did not do a full computer edit, but tallied directly, hence making the data set timelier. Results appeared within a day after the last data were collected. The data were then copied into Excel to make them more presentable for this report.

RESULTS

Appendix A has two sets of tables based on the results of the pilot survey. In the first set of five pages we show each of the variables in the survey crossed by current residence – that is the place the visitor reported he or she usually lives. For the Japanese flights this place was almost always Japan – as would be expected – and for the Taiwanese flights, the place was Taiwan. However, for the Continental flights, especially, visitors came from many nations, all of them warmly received in Palau, of course. So, the distribution was not 50 per flight – we selected Japan, United States, Guam and CNMI, and Taiwan, as well as a catch-all “all others” as our 5 categories. The first set of tables shows the results of straight crosses for this breakdown.

The second set of tables shows all of the variables crossed by income level. For this pilot survey, we used categories of income, in U.S. dollars. Of course, not all visitors could make straight conversions from their own currency to dollars, but especially since they had just been in Palau with its use of dollars, most of the tourists were able to do the conversions. For those that were not, the Bank of Hawaii provided exchange rates which the OPS staff used in their office during coding to do the conversions. So, the second set of tables uses the five income categories defined for the pilot.

Readers wanting more detailed tabulations, then can refer first to the appendix here, but can also contact the staff directly to get more detailed information from the survey.

Tables by Current Residence

The following tables contain summary information, using some of the cross-tabulations for the respondents’ income and present residence. The first set of tables analyzes some of the 26 variables of the survey by the visitors’ present residence. The present residence is the place they resided in at the time they took the trip to visit Palau.

The table below, Table 1, shows the visitors’ present residence by how many times they have visited Palau. In this small sample, Japan had the most visitors and the highest percentage of visitors stating that they have visited Palau more than once, followed by the United States.

The table shows that the largest number of people were resident in Japan – 58 or 29 percent of the total – followed by Taiwan with 50 or 25 percent, the “all others” category with 48 or 24 percent, the United States (30 or 15 percent), and finally Guam and CNMI (14 or 7 percent). Most people – 61 percent – were finishing their first visit to Palau, with the Taiwan visitors to be the most likely to be in the category, based on the percentages. Based on the very small number included living in Guam and CNMI, they were the most likely to be repeat visitors, with 10 of the 14 having visited Palau 5 times or more. They were 40 percent of all the visitors who came that often. Of course, proximity counts here, and they are by far the closest.

Table 1. Times visited Palau by Present Residence: 2004

Number of times visited	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
First visit	132	17	2	30	49	34
Second visit	27		-			

		5		14	1	7
Third visit	11	5	1	3	-	2
Fourth visit	5	1	1	3	-	-
Fifth visit or more.	25	2	10	8	-	5

Source: 2004 Palau Tourism Survey

Table 2 below shows how many nights the visitors spent in Palau by their present residence. The largest number of visitors stated that they spent between 3 to 5 nights in Palau, with 40 visitors from Japan stating that they spent exactly 5 nights in Palau, and Taiwan visitors (49 of the 50) stating that they had spent exactly 3 nights in Palau. What this clearly shows is the impact of package tours from those places – and the absolute frequency of flights. If visitors have to decide between 3 days and a week, since 5 days is not an option for them, they may make the decision to stay only 3 when they might have wanted to stay longer. Half of the total visitors from other countries of residence stated that they spent 7 to 14 nights in Palau, which is a good sign for Palau’s tourism industry.

Table 2. Number of nights spent in Palau by Present Residence: 2004

Number of nights spent in Palau	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
One	6	1	3	2	-	-
Two	8	2	1	-	1	4
Three	59	3	4	1	49	2
Four	25	3	1	15	-	6
Five	53	5	3	40	-	5
Six	5	1	1	-	-	3
Seven	19	9	-	-	-	10
Eight to ten	9	3	-	-	-	6
Eleven to fourteen	9	1	-	-	-	8
More than fourteen	6	2	-	-	-	4
Not stated	1	-	1	-	-	-

Source: 2004 Palau Tourism Survey

Table 3 gives us the visitors’ present residence by the activities they engaged in while in Palau. Note that the numbers shown do not sum up to the total as the visitors did more than one activity. Diving is the most popular activity followed by snorkeling. This is not unexpected as Palau is viewed worldwide as a premier diving destination. Japan had the highest number of visitors stating their activity as diving, while Taiwan had the highest number of visitors stating their activity as snorkeling. But the three top activities varied somewhat by place of origin. For residents of Japan, the top three activities were diving (53), snorkeling (10), and Rock Island tours (6); for the Taiwanese it was snorkeling (48), land tours (36), and kayaking (29) – and very little diving compared to the other groups. And for the United States visitors and the “others”, the most popular activities were diving, snorkeling, and land tours.

Table 3. Activities engaged in by Present Residence: 2004

		United	Guam &			
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Activities engaged in	Total	States	CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Diving	115	21	3	53	11	27
Snorkeling.	103	17	4	10	48	24
Kayaking	46	3	2	4	29	8
Sports fishing	20	-	1	2	15	2
Rock Islands tour.	57	7	4	6	27	13
Land tour.	70	10	2	5	36	17
Business	25	4	8	-	-	13
Conference/seminar/workshop.	2	-	-	-	-	2
Honeymoon/wedding.	1	-	-	-	1	-
Visiting friends/family.	14	2	6	1	1	4
Night life	26	4	5	1	9	7
Other.	8	1	1	-	3	3

Source: 2004 Palau Tourism Survey

Table 4 shows the factors influencing visitors in their selection of coming to Palau by their present residence. Palau's reputation as a premier dive destination is the major factor influencing visitors' decision to come to Palau, as can be seen in Tables 3 and 4. As above, visitors could select more than one factor, but most of them only selected one. Palau's reputation as a dive destinations was selected by 58 percent of the visitors, with 48 of the 58 Japanese selecting this category as well as 27 (54 percent) of the Taiwanese. But Palau's environment was even a more popular choice – at 74 percent of the Taiwanese – these 37 people were more than half of all the visitors selecting the environment as their reason for coming to Palau.

Table 4. Factors influencing decision for selecting Palau by Present Residence: 2004

Factors influencing decision for selecting Palau	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Nearby to residence.	18	1	3	2	9	3
Cheap destination.	7	1	1	1	3	1
Safe destination	23	-	1	3	12	7
Reputation as dive destination	116	16	2	48	27	23
Environment.	63	6	4	8	37	8
Other.	47	11	8	4	5	19
Don't know	1	-	-	1	-	-

Source: 2004 Palau Tourism Survey

The following table, Table 5, shows the type of tour used by the visitors by their present residence. Here we see that the 2 out of every 3 visitors chose package tours rather than on individual tours. This is mainly due to the two charter flights coming to Palau from Japan on Japan Airlines, and from Taiwan on the Far Eastern Airlines. Most visitors from these two countries visit Palau on package tours.

The table also shows the average price of package tours for visitors by their present residence. The average price of tour package shows that visitors who stated that their present residence is the United States paid more – over \$4,000 – on tour packages than any other group. This is mainly due to the airfare, which is quite a bit higher because they are coming so much farther. The “others” came in second, at \$2,628, with most of them being from Europe, then the Japanese (\$2,100). Since Guam and Taiwan are relatively close to Palau, the costs of getting here, particularly on package tours, are lower.

Table 5. Type of tour by Present Residence: 2004

Type of Tour	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Individual tour.	66	15	10	4	-	37
Package tour	127	14	1	54	50	8
Average price of tour package (\$). .	1,784	4,080	810	2,130	653	2,628
Other.	7	1	3	-	-	3

Source: 2004 Palau Tourism Survey

One of the interesting aspects about the pilot visitors survey is the effort to disaggregate the package tour visitors from those on individual tours outside of packages. Table 6 below shows the type of actual expenditures covered for visitors who traveled by package by their present residence. Here also, package tours covered more than one expenditure, so the numbers sum to more than the total. Only 4 visitors did not report their hotel being covered by their package (which could be a mistake – it is important to note that some visitors may not have known exactly what was covered, and others may simply not have responded.) The most common areas of coverage were the expected ones – hotels, airfare, and diving/snorkeling, and meals. Some of the others were also interesting – about 1 in 4 had land tours included in the package, and about the same number had Rock Island tours included.

Table 6. Expenditures covered by package by Present Residence: 2004

Expenditures covered by Package tour	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	123	14	1	52	48	8
Airfare.	113	11	1	51	44	6
Hotel/lodgings	119	14	1	51	45	8
Meals.	90	11	-	32	43	4
Ground transport.	66	10	-	12	40	4
Rock Islands tour.	35	3	1	1	29	1
Diving/snorkeling.	107	14	1	43	44	5

Land tours	33	-	-	1	32	-
Kayaking	23	1	1	-	21	-
Rock Islands permit	16	1	-	1	14	-
Other	3	1	-	2	-	-

Source: 2004 Palau Visitor Survey

Most visitors contribute to Palau’s economy above what they pay for their package tour. Table 7 shows some of the other expenditures visitors have that were not covered by their package. The structure of the table gives both the number of tourists who replied that they spent on the particular item or expenses, and the average they spent. We obtained the average by summing up all of the expenses, and then dividing by the number of visitors who had that particular expenses (not, as is sometimes done, dividing by all of the visitors); this method allows the visitors industry to look specifically at the actual visitors spending on a particular activity.

Of the visitors interviewed, 77 had expenses in addition to their package (____ percent of all those on package tours). The average amount they spent in addition to their package was \$401 – a significant amount since many of the tourists were Japanese, who stayed for 5 days or less. Many visitors spent in more than one category so the total cases add to more than 100 percent. Visitors from the United States spent the most additional expenses of the specific places, at an average of \$645, but “others” spent an average of \$675 – Japanese spent \$346, about \$100 more than Taiwanese.

About 2/3rds of the visitors (51 of the 77) spent additional amounts on meals, with an average of \$148. The next largest category, in terms of numbers of visitors was shopping – the 46 visitors spent an average of \$124. While the numbers of visitors for some of the other categories was smaller, the average amounts spent were larger – the 19 people using transport spent an average of \$167 in addition to their package, and those going diving spent \$266, for example. The two “other” people going on land tours spent an average of \$550.

Table 7. Expenditures paid in addition to package by Present Residence: 2004

Expenditures paid in addition to package	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	77	12	1	46	12	6
<i>Average amount (\$)</i>	401	645	350	346	234	675
Meals	51	6	1	37	2	5
<i>Average amount (\$)</i>	148	164	150	112	281	344
Transport	19	4	1	9	1	4
<i>Average amount (\$)</i>	167	675	50	12	28	73
Snorkeling	6	1	-	3	2	-
<i>Average amount (\$)</i>	61	61	-	49	78	-
Diving	29	1	-	28	-	-
<i>Average amount (\$)</i>	266	600	-	254	-	-
Kayaking	4	-	-	2	2	-

<i>Average amount (\$)</i>	214	-	-	150	278	-
Land tours	13	4	-	5	2	2
<i>Average amount (\$)</i>	151	70	-	94	58	550
Rock Islands tour.	5	-	-	4	-	1
<i>Average amount (\$)</i>	117	-	-	97	-	200
Night life	5	2	-	1	1	1
<i>Average amount (\$)</i>	97	135	-	15	100	100
Rock Islands permit.	18	3	-	10	-	5
<i>Average amount (\$)</i>	21	27	-	15	-	28
Shopping/souvenirs	46	7	1	27	7	4
<i>Average amount (\$)</i>	124	266	150	102	60	125
Other.	7	2	-	1	4	-
<i>Average amount (\$)</i>	297	450	-	300	219	-

Source: 2004 Palau Visitor Survey

The other large group of visitors were those who did not come on a package tour, but made their own arrangements. Table 8 shows their expenditures – their numbers in each category and the average amounts they spent. Taiwan visitors were all traveling on package tours so no numbers are shown here. The average amount spent was about \$2,500 for the 65 people on individually arranged tours. Visitors in the “other” category were more than half of these, and they also spent the most, on average, at \$3,224. People from Japan and Guam spent the least.

The largest category of expense was airfare, which also influenced the total amount paid by the visitors. The largest number of visitors in this group – 52 of the 65 (80 percent), paid for a hotel – although the pilot survey did not collect the names of the hotels. The average hotel bill was \$812. Since the average hotel bill from those coming from the States was \$1,220, it is likely that they were staying at some Palau’s high end hotels, while those from Guam and Japan were staying at more mid-level hotels.

The second largest category, with 48 responses was airfares. As noted above in the discussion of airfares those coming the farthest paid the most in airfares. For those from “other” places, the average was \$1,788, and those from the United States paid an average of \$1,450. Meals was the third largest category

with 45 responses and an average of \$219 being spent. The 25 visitors who did diving spent an average of \$632 during their visit.

Table 8. Expenditures for Individual tour visitors by Present Residence: 2004

Expenditures for Individual tour Visitors	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	65	14	12	4	-	35
Average total amount (\$)	2,502	2,627	649	1,296	-	3,224
Airfare	48	11	5	2	-	30
Average amount (\$)	1,536	1,450	530	743	-	1,788
Meals	45	10	9	2	-	24
Average amount (\$)	219	284	142	140	-	227
Transport	29	6	4	1	-	18
Average amount (\$)	184	218	97	150	-	193
Snorkeling	6	1	-	-	-	5
Average amount (\$)	448	100	-	-	-	517
Diving	25	7	1	2	-	15
Average amount (\$)	632	440	250	435	-	773
Kayaking	6	2	-	-	-	4
Average amount (\$)	164	55	-	-	-	219
Hotels/lodgings	52	9	8	3	-	32
Average amount (\$)	812	1,220	237	511	-	870
Land tours	5	1	-	-	-	4
Average amount (\$)	52	40	-	-	-	55
Rock Islands tour	5	1	-	-	-	4
Average amount (\$)	91	80	-	-	-	94
Night life	12	1	4	-	-	7
Average amount (\$)	166	300	230	-	-	110
Rock Islands permit	18	4	-	2	-	12
Average amount (\$)	20	20	-	18	-	20
Shopping/souvenirs	20	4	3	1	-	12
Average amount (\$)	155	144	127	30	-	176
Other	14	3	1	2	-	8
Average amount (\$)	416	447	25	400	-	458

Source: 2004 Palau Visitor Survey

Many visitors come to Palau as part of a package tour, or even an individually arranged tour that covers more than just Palau. That is, several countries are visited within a single vacation or business trip. Table 9 shows if visitors had transportation and expenses in other countries included in their expenditures in Tables 6, 7 and 8 above, or not. It also gives the average amount of expenditures in other countries that were not included in the above tables. The numbers shown here do not add up to 200 because there were 4 visitors who left the question blank.

Of those who did reply, 73 (percent) reported that they did have expenses in other countries. For each of the locations of current residence, more people did not have expenses than did have expenses, but it is clear that the Japanese were the most likely to have these expenses since their numbers are the most evenly divided. The average amount spent was \$172 per visitor, with residents of “other” countries spending the most -- \$447 – followed by the U.S. (\$218) and Taiwan (\$217). For the “others”, they have a lot of changes of flights and so have expenses connected with the various places they stop.

Table 9. Transportation and expenses in other countries by Present Residence: 2004

Transportation and expenses in other countries	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	196	22	58	42	42	32
Did not include expenses in other places	123	16	36	23	26	22
Did include expenses in other places	73	6	22	19	16	10
Average amount (in US \$)	172	218	59	105	217	447

Source: 2004 Palau Visitor Survey

Table 10 below asked visitors, especially divers and snorkelers, whether they visited other diving or snorkeling destinations within the last 12 months or not. A total of 77 visitors stated they visited other diving or snorkeling destinations. The largest number were from Japan, slightly less than half of the total. The most common destinations were “other” places (30), Asia (22), and Guam, CNMI and the FSM (14).

Table 10. Other diving or snorkeling destinations visited by Present Residence: 2004

Other diving or snorkeling destinations visited	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	77	16	3	34	2	22
Guam, CNMI, and FSM.	14	2	2	8	-	2
Other Pacific.	2	1	-	-	-	1
Australia and New Zealand.	3	1	-	1	-	1
United States.	1	1	-	-	-	-
Caribbean.	5	5	-	-	-	-
Asia	22	1	1	5	-	15
Other places	30	5	-	20	2	3

Source: 2004 Palau Visitor Survey

Table 11 shows what the visitors most liked about their last diving or snorkeling in Palau. The visitors had more than one option, so the numbers do not add to the total. Fish diversity was selected by the majority of respondents as being the most liked (112 of the 154 responses, or percent). The second most frequently selected was water conditions (95 respondents), clean, heathy environment (89) and

turtles and other sea animals and corals (79 each). The selections for the Japanese and those from the U.S. were about the same as for the total, but, as above, the Taiwanese stated more environment related “likes” – fish diversity appeared 4th after water conditions, clean, healthy environment, and corals.

Table 11. Most liked about last diving/snorkeling by Present Residence: 2004

Most liked about last diving or snorkeling in Palau	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	154	27	6	54	35	32
Water conditions/visibility.	95	16	4	27	27	21
Other visitors on tour	28	8	-	12	5	3
Dive operators service	76	15	1	33	12	15
Clean, healthy environment	89	13	2	30	25	19
Turtles/dolphins/sharks/rays	79	13	4	29	9	24
Corals	79	17	3	18	23	18
Fish diversity	112	23	3	44	20	22
Weather.	36	9	1	8	8	10
Other.	11	2	-	6	2	1

Source: 2004 Palau Visitor Survey

Fewer visitors reported “dislikes” than “likes”. As Table 12 shows, of the 85 responses, the most selected was the weather, followed by water conditions. The visitors had more than one option, so the numbers do not add to the total. Japanese made up 16 of the 26 visitors complaining about the weather. They also were 13 of the 24 complaining about water conditions.

Table 12. Most disliked about last diving/snorkeling by Present Residence: 2004

Most disliked about last diving or snorkeling in Palau	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	85	15	6	31	17	16
Water conditions/visibility.	24	6	-	13	2	3
Other visitors on tour	16	2	2	4	3	5
Dive operators service	3	2	-	1	-	-
Turtles/dolphins/sharks/rays	2	1	-	-	1	-
Lack of clean, healthy environment	6	-	1	1	3	1
Corals	9	2	-	5	-	2
Fish diversity	4	1	-	1	2	-
Weather.	26	3	1	16	4	2
Other.	20	5	4	2	4	5

Source: 2004 Palau Visitor Survey

As a top visitor destination in this part of the world, Palau has many return visitors. Of the 200 in the sample, 49, or almost 1 in 4, were return visitors to Palau (Table 13). A question asked visitors who came to Palau more than once if their diving or snorkeling trips were better on this trip than their previous trips. It is interesting to note that

visitors who have visited Palau more than once stated that their trip was better (18, or ____ percent) than their previous trip, as compared to 5 (____ percent) who stated it was worse than their previous trip. But 26 of repeat visitors stated that it was about the same as their previous trip. Visitors from the United States and Japan were both happier on the current trip than on previous ones.

Table 13. Diving/snorkeling trips better or worse than previous by Present Residence: 2004

Diving or snorkeling trips better or worse than previous trips	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Better than previous trips	18	6	1	11	-	-
About the same as previous trips . . .	26	4	4	13	1	4
Worse than previous trips.	5	1	-	3	-	1
First trip	151	19	9	31	49	43

Source: 2004 Palau Visitor Survey

All visitors were asked about their feelings about the state of Palau’s corals, and exactly half replied that they felt the corals were very healthy or healthy (Table 14). The 58 (29 percent) who didn’t respond probably were not divers or snorkelers. Some areas for diving are bleached and others are very healthy, so it would depend, of course, on where the visitors went while they were in Palau. About 20 percent of the visitors felt that the corals were not healthy, dead or bleached.

Table 14. Condition of corals and reefs on this trip by Present Residence: 2004

Condition of corals and reefs on this trip	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Very healthy	27	8	2	3	10	4
Healthy.	73	12	3	20	22	16
Not healthy.	25	2	-	16	3	4
Dead	7	-	1	2	3	1
Bleached	10	2	-	-	6	2
Don't know	58	6	8	17	6	21

Source: 2004 Palau Visitor Survey

For the return visitors, the questionnaire asked about whether the corals and reefs were better or worse than on previous trips. Table 15 shows the results, with about 1 in 4 of the visitors being return visitors and answering the item. The large majority felt the corals and reefs were the same, with a equally small numbers stating that the reefs and corals were better (7 cases) or worse (another 7 cases).

Table 15. Condition of corals and reefs better or worse than previous by Present Residence: 2004

Condition of corals and reefs better than previous trips	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Better than previous trips	7	3	3	1	-	-
About the same as previous trips . . .	34	7	2	21	-	4
Worse than previous trips.	7	1	-	4	1	1
First trip						

	152	19	9	32	49	43
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Source: 2004 Palau Visitor Survey

Table 16 shows the number of day trips visitors took to the Rock Islands by their present residence. Of the 200, 121 visitors (more than 60 percent) stated that they visited the rock islands once. This is consistent with Table 3 which shows that most visitors came as divers and snorkelers. About 13 percent of the visitors were on 5 or more trips to the Rock Islands during their stay, with the large majority being from “other” places, followed by those from the United States.

Table 16. Number of Day Trips to the Rock Islands by Present Residence: 2004

Number of Day Trips to the Rock Islands	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
None	27	3	8	1	1	14
One.	121	15	3	45	46	12
Two.	10	2	2	3	3	-
Three.	7	2	1	1	-	3
Four	9	2	-	5	-	2
Five to nine	22	5	-	3	-	14
Ten or more.	4	1	-	-	-	3

Source: 2004 Palau Visitor Survey

Visitors are supposed to get permits to go to the Rock Islands. As Table 17 shows, about 1/3rd didn't know whether they obtained a permit or not (2/3rds of those were Taiwanese or “other”). For Taiwanese, their package includes everything – the permit as well as their departure tax – but they may not know the permit was included. Of those who did know whether they paid or not, about 2/3rd did pay, but the others did not.

Table 17. Rock Island permit fee by Present Residence: 2004

Rock Island Permit Fee	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Paid for the permit.	94	21	4	31	10	28
Did not pay for the permit	45	3	2	20	16	4
Don't know/Didn't know there was a fee	61	6	8	7	24	16

Source: 2004 Palau Visitor Survey

Naturally, the visitor industry in Palau is very interested in the level of satisfaction with various aspects of the visitor experience while in Palau. A scale from 1 to 5 was presented, with 5 being Very Satisfied and 1 being Not Very Satisfied. Table 18 shows the number of visitors who responded to each item, and the average satisfaction rating. The average rating was obtained by summing the individual responses and then dividing by the number of people who responded to each item.

The bottom line of the table shows that the overall satisfaction rate of visitors was 3.9, with Japan recording the lowest overall satisfaction at 3.4 and those from Guam and Saipan having the highest at 4.3. Visitors from the United States had an average rating of 4.2, followed by those from “other” places, and the Taiwanese (4.0).

The numbers replying and average ratings for other measures of satisfaction are also shown in the table. The averages for all visitors ranged from 3.6 for hotel value (again, the survey did not collect type or name of hotel) to 4.4 for dive site quality, diving service, and diving safety. All ratings were relatively high showing that Palau gives good value for the visitor experience.

Table 18. Satisfaction rating by Present Residence: 2004

Satisfaction rating	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Hotel facilities	189	27	13	54	48	47
<i>Average satisfaction</i>	3.8	4.1	3.7	3.5	4.0	3.7
Hotel service.	188	27	13	53	48	47
<i>Average satisfaction</i>	3.8	4.3	3.4	3.5	3.9	3.8
Hotel value.	181	25	13	50	48	45
<i>Average satisfaction</i>	3.6	3.7	3.3	3.4	4.0	3.4
Dive site quality.	144	22	6	51	37	28
<i>Average satisfaction</i>	4.4	4.4	4.8	4.4	4.2	4.8
Snorkeling site quality.	125	19	6	28	48	24
<i>Average satisfaction</i>	4.2	4.2	4.7	4.1	4.1	4.3
Diving/snorkeling service (guides) . .	159	24	6	52	46	31
<i>Average satisfaction</i>	4.4	4.6	4.8	4.5	4.2	4.5
Diving safety.	152	22	6	53	43	28
<i>Average satisfaction</i>	4.4	4.6	4.7	4.4	4.2	4.5
Diving facilities (boat, equipment). .	150	23	6	53	41	27
<i>Average satisfaction</i>	4.2	4.7	4.7	4.0	4.0	4.4
Diving value	148	23	6	52	42	25
<i>Average satisfaction</i>	3.9	4.3	4.5	3.5	3.9	4.0
Land tours	98	14	5	18	46	15
<i>Average satisfaction</i>	3.7	4.1	4.4	3.2	3.7	4.0

Rock Islands tours	94	15	6	14	44	15
<i>Average satisfaction</i>	4.1	4.7	4.8	3.0	3.9	4.5
Island beauty.	178	28	13	48	48	41
<i>Average satisfaction</i>	4.3	4.6	4.7	4.3	4.0	4.4
Overall value.	182	27	12	52	48	43
<i>Average satisfaction</i>	3.9	4.2	4.3	3.4	4.0	4.1

Source: 2004 Palau Visitor Survey

One of the most important items on the whole survey from Palau’s point of view had to do with whether the visitors were willing to pay a set amount to help preserve the great environment that Palau currently has. In order to obtain some measure of the monetary contribution visitors might make to help maintain the reefs and corals, a question asked for this purpose. The actual question varied depending on the group and the time because it was clear very early on that a completely open-ended question would not work – the visitors did not know how to respond. So, they were asked something like “If the price of your trip had been \$20 higher, would you still come to Palau?” Table 19 shows the results for different amounts -- \$5, \$10, \$20, \$30, \$50 or \$75. The question was whether they would still be willing to pay if the amount stated was for a conservation fee. The numbers are respondents who agreed they will pay that amount. Here we see 50 visitors – a full 25 percent of those surveyed – who stated they would be willing to pay \$75 in addition to the price of their trip if it is for the purpose of a conservation area. Fully 29 of the 50 (58 percent) had Japan as their present residence. And 20 percent of the Taiwanese visitors also fell in this category.

Table 19. Amount of money willing to pay if conservation fee by Present Residence: 2004

Amount of money willing to pay if Conservation fee	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
\$ 5	23	6	-	5	6	6
\$ 10	33	7	2	8	8	8
\$ 20	29	2	2	5	9	11
\$ 30	24	4	3	4	8	5
\$ 50	30	5	2	7	9	7
\$ 75	50	3	1	29	10	7
Others	11	3	4	-	-	4

Source: 2004 Palau Visitor Survey

Table 20 shows the response of visitors who were asked if they would still come even if the price of the trip went up because of the conservation fee. The 135 visitors out of the 200 surveyed who stated they still would come to Palau even if the price of their trip went up because of the conservation fee were about 2/3rds of those asked.

Table 20. Still would come if price of trip went up by Present Residence: 2004

Still would come if price of trip went up	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Yes.	135	26	11	36	30	32
No.	65	4	3	22	20	16

Source: 2004 Palau Visitor Survey

Table 21 shows the preference of visitors on how the conservation fee should be charged by their present residence. The largest category – 45 percent of the responses – was per visit. About 15 percent thought that the fee should be charged per dive and another 16 percent had no preference.

Table 21. Preference to charging conservation fee by Present Residence: 2004

Preference to charging conservation fee	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Per visit (valid for up to 1 month). .	90	20	6	20	18	26
Per dive/snorkel/activity.	30	2	4	14	6	4
No specific preference.	32	3	1	8	15	5
Other.	6	-	1	2	1	2
Don't know.	42	5	2	14	10	11

Source: 2004 Palau Visitor Survey

Because Palau is so oriented towards our seas, we have many different agencies working with the environment – in the public sector, non-governmental organizations, and the private sector. Palau makes real efforts to integrate the various elements. So, the visitor survey asked the visitors who they thought should collect the fee when imposed. Although about 1/4th did not know, about 40 percent of the 200 respondents felt that the public sector should collect the fee, and another 20 percent felt it should be an NGO (Table 22).

Table 22. Type of organization to manage conservation fee by Present Residence: 2004

Type of organization to manage	United	Guam &			

conservation fee	Total	States	CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Public sector (States, National Gov't).	81	9	2	34	24	12
Private sector (Operators, rentals) . .	13	4	2	1	3	3
NGOs (Palau Conservation Soc, TNC,WWF)	40	9	4	6	12	9
Public/private/NGO partnerships. . . .	12	1	4	2	-	5
Local communities.	3	-	-	1	-	2
Don't know	51	7	2	14	11	17

Source: 2004 Palau Visitor Survey

Table 23 shows the preference of visitors on how the fee should be paid. A total of 130 respondents (65 percent) wanted a one fee for the whole of Palau rather than by a fee per state or per site. This was consistent for all countries of residence.

Table 23. Preference for paying fee by Present Residence: 2004

Preference for paying fee	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
One fee for the whole of Palau	130	20	11	39	27	33
Fee per state.	18	4	-	8	1	5
Fee per site	9	1	2	1	4	1
No preference.	31	5	1	10	9	6
Other preference	12	-	-	-	9	3

Source: 2004 Palau Visitor Survey

The following tables show the demographics of the visitors selected for the survey. Table 24 combines the age group and sex of visitors by their present residence. About 2/3rds of the survey respondents were male, perhaps because males were more willing to respond to the questions. The male of a couple traveling together usually answered the questionnaire.

Table 24. Age Group and Sex by Present Residence: 2004

Age Group	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
15 to 19 years	-	-	-	-	-	-
20 to 24 years	6	1	-	1	2	2
25 to 29 years	38	2	2	17	12	5
30 to 34 years	45	2	1	17	17	8
35 to 39 years	31	2	2	8	11	8
40 to 44 years	24	2	2	7	3	10
45 to 49 years	11	1	3	2	1	4
50 to 54 years	14	5	2	4	-	3
55 to 59 years	16	8	2	-	2	4
60 years and over.	15	7	-	2	2	4
Males:	122	19	9	31	27	36
15 to 19 years	-	-	-	-	-	-
20 to 24 years	4	1	-	1	-	2
25 to 29 years	17	1	1	6	6	3
30 to 34 years	22	1	1	6	9	5
35 to 39 years	20	1	-	6	6	7
40 to 44 years	16	2	2	6	2	4
45 to 49 years	9	1	2	2	-	4
50 to 54 years	11	4	2	2	-	3
55 to 59 years	12	5	1	-	2	4
60 years and over.	11	3	-	2	2	4
Females:	78	11	5	27	23	12
15 to 19 years	-	-	-	-	-	-
20 to 24 years	2	-	-	-	2	-
25 to 29 years	21	1	1	11	6	2
30 to 34 years	23	1	-	11	8	3
35 to 39 years	11	1	2	2	5	1
40 to 44 years	8	-	-	1	1	6
45 to 49 years	2	-	1	-	1	-
50 to 54 years	3	1	-	2	-	-
55 to 59 years	4	3	1	-	-	-
60 years and over.	4	4	-	-	-	-

Source: 2004 Palau Visitor Survey

Table 25 shows the highest level of education for the visitors by their present residence. Only 2 had not finished high school. Fully 90 percent were high school graduates and 74 percent were college graduates. And, 1/3rd had higher degrees. Palau definitely attracts and educated visitor.

Table 25. Highest level of education completed by Present Residence: 2004

Highest level of Education completed	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Not a high school graduate	2	-	-	1	1	-
High school graduate	18	1	-	12	-	5
Some college or university	32	3	6	9	7	7
Finished college (BA/BS)	81	10	5	30	26	10
Advanced degree (MS,PhD)	67	16	3	6	16	26

Source: 2004 Palau Visitor Survey

The data for highest level of education are also seen in the income categories. Table 26 gives us the income of visitors by their current residence. Visitors who stated the United States as their residence had the highest number of people stating that their income was \$140,000 or more. More than half of the respondents stated their income as between \$25,000 to \$74,999.

Table 26. Income in dollars by Present Residence: 2004

Income in Dollars	Total	United States	Guam & CNMI	Japan	Taiwan	Others
Total:	200	30	14	58	50	48
Less than \$25,000	22	2	2	8	3	7
\$25,000 to \$49,999	58	2	4	17	28	7
\$50,000 to \$74,999	45	7	2	10	11	15
\$75,000 to \$99,999	30	7	3	11	5	4
\$100,000 to \$119,999	12	2	-	3	-	7
\$120,000 to \$139,999	9	1	-	3	2	3
\$140,000 and above	24	9	3	6	1	5

The next set of tables deals with the income of visitors in the survey. Only a few tables will be shown here. The reader can refer to appendix A for the full set of tables.

Table 27 shows the number of times visitors had visited Palau by their income range. The income range of \$25,000 to \$49,999 had the most visitors who came to Palau for the first time. The visitors who visited twice seemed to increase with their income level as well as those who have visited 5 or more times.

Table 27. Number of times visited Palau by Income: 2004

Number of times visited Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
First visit	132	17	45	30	24	16
Second visit	27	2	5	6	7	7
Third visit	11	1	3	2	2	3
Fourth visit	5	-	1	1	2	1
Fifth visit or more.	25	2	4	6	7	6

Source: 2004 Palau Tourism Survey

Table 28 shows the number of nights spent by visitors in Palau by their income range. 3 to 5 nights were stated by most visitors to have been spent in Palau, with visitors whose income range of \$25,000 to \$49,999 being the majority group.

Table 28. Number of nights spent in Palau by Income: 2004

Number of nights spent in Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	199	22	58	45	42	32
One.	6	1	2	-	2	1
Two.	8	1	-	3	-	4
Three.	59	4	29	12	8	6
Four	25	2	7	5	6	5
Five	53	10	14	10	12	7
Six.	5	-	1	-	3	1
Seven.	19	1	-	7	7	4
Eight to ten	9	-	3	3	2	1
Eleven to fourteen		-	2	5	1	

	9					1
More than fourteen	6	3	-	-	1	2

Source: 2004 Palau Tourism Survey

Table 29 was responses by visitors on activities they engaged in while in Palau by their income range. The activities are spread out and predominantly tourist related activities of diving, snorkeling, land tour, rock island tour and kayaking. Visitors with income ranging from \$25,000 to \$119,999 are the majority group.

Table 29. Activities engaged in by Income: 2004

Activities engaged in while in Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Diving	115	11	28	27	32	17
Snorkeling	103	6	36	23	21	17
Kayaking	46	3	19	11	10	3
Sports fishing	20	2	13	2	2	1
Rock Islands tour	57	6	21	12	12	6
Land tour	70	7	25	19	10	9
Business	25	3	2	5	6	9
Conference/seminar/workshop	2	1	-	-	1	-
Honeymoon/wedding	1	-	-	1	-	-
Visiting friends/family	14	4	4	3	-	3
Night life	26	3	10	5	4	4
Other	8	1	2	-	3	2

Source: 2004 Palau Tourism Survey

In Table 30 below, visitors were asked what factors influenced their decision in selecting Palau for their visit. Palau’s reputation as a premier dive destination was by far the main reason most visitors selected Palau, followed by the environment. Visitors with income range between

\$25,000 and \$49,999, again the majority group, also responded the most that Palau's reputation as a dive destination is their influencing factor for selecting Palau.

Table 30. Factors influencing decision for selecting Palau by Income: 2004

Factors influencing decision for selecting Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Nearby to residence.....	18	5	5	4	3	1
Cheap destination.....	7	1	2	2	2	-
Safe destination.....	23	3	4	8	6	2
Reputation as dive destination....	116	12	38	26	24	16
Environment.....	63	3	30	13	8	9
Other.....	47	6	5	10	13	13
Don't know.....	1	-	-	1	-	-

Source: 2004 Palau Tourism Survey

Table 31 shows the type of tour used by visitors by their income level. Visitors making less than \$25,000 had quite a high average price of package tour. This might be because they were saving for this trip. Most visitors in all income level used package tour. Visitors making \$75,000 or more had the highest average price of tour package.

Table 31. Type of tour by Income: 2004

Type of Tour	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Individual tour.....	66	9	9	19	13	16
Package tour.....	127	12	48	25	26	16
Average price of tour package (\$). .	1,784	1,743	1,277	1,830	2,420	2,235
Other.....	7	1	1	1	3	1

Source: 2004 Palau Tourism Survey

Table 32 shows the number of visitors traveling by tour package who responded to the questionnaire in stating their expenditures covered by the tour package. 96 of the 123 visitors who responded had incomes ranging from \$25,000 to \$119,000.

Table 32. Expenditures covered by package by Income: 2004

Expenditures covered by Package tour	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	123	12	46	24	26	15

Airfare.	113	12	45	21	23	12
Hotel/lodgings	119	12	44	23	25	15
Meals.	90	11	34	16	20	9
Ground transport.	66	5	28	16	12	5
Rock Islands tour.	35	3	19	6	5	2
Diving/snorkeling.	107	11	42	22	22	10
Land tours	33	3	18	6	6	-
Kayaking.	23	3	15	3	2	-
Rock Islands permit.	16	2	11	1	2	-
Other.	3	-	1	-	1	1

Source: 2004 Palau Visitor Survey

Table 33 shows the number of visitors who stated their expenditures that were not covered by their package tour. 77 visitors stated they had expenditures not covered by their package. The income range of \$25,000 to \$74,999 had the least average amount of expenditures. This may be due to more visitors in this income range traveling by tour package, having most of their expenditures covered by their tour package.

Table 33. Expenditures paid in addition to package by Income: 2004

Expenditures paid in addition to package	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	77	8	26	14	18	11
<i>Average amount (\$)</i>	401	404	274	332	490	640
Meals.	51	5	15	9	12	10
<i>Average amount (\$)</i>	148	118	118	130	135	241
Transport.	19	3	7	-	5	4
<i>Average amount (\$)</i>	167	41	22	-	534	56
Snorkeling	6	-	3	1	1	1

<i>Average amount (\$)</i>	61	-	65	61	87	20
Diving	29	3	8	5	6	7
<i>Average amount (\$)</i>	266	372	268	232	278	234
Kayaking	4	-	1	1	2	-
<i>Average amount (\$)</i>	214	-	56	500	150	-
Land tours	13	-	3	3	3	4
<i>Average amount (\$)</i>	151	-	72	47	64	355
Rock Islands tour.	5	-	1	1	2	1
<i>Average amount (\$)</i>	117	-	100	100	94	200
Night life	5	1	3	1	-	-
<i>Average amount (\$)</i>	97	70	133	15	-	-
Rock Islands permit.	18	1	9	3	3	2
<i>Average amount (\$)</i>	21	30	21	22	15	23
Shopping/souvenirs	46	7	16	7	11	5
<i>Average amount (\$)</i>	124	143	71	119	186	136
Other	7	1	3	2	-	1
<i>Average amount (\$)</i>	297	300	255	306	-	400

Source: 2004 Palau Tourism Survey

Table 34 was responses by visitors who paid for their own travel. The average expenditure of \$2,151 for visitors who make less than \$25,000 might be because they were saving for this trip.

Table 34. Expenditures for Individual tour visitors by Income: 2004

Expenditures for Individual tour visitors	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	65	8	9	16	16	16
Average amount (\$)	2,502	2,151	1,818	2,331	3,070	2,664
Airfare.	48	5	4	14	12	13
Average amount (\$)	1,536	1,900	1,550	1,160	1,428	1,897
Meals.	45	5	6	11	10	13

Average amount (\$)	219	186	258	158	271	225
Transport.	29	4	2	9	6	8
Average amount (\$)	184	113	200	107	250	251
Snorkeling	6	-	-	3	3	-
Average amount (\$)	448	-	-	128	767	-
Diving	25	1	3	8	7	6
Average amount (\$)	632	900	833	605	639	513
Kayaking	6	-	-	2	3	1
Average amount (\$)	164	-	-	75	275	10
Hotels/lodgings.	52	7	6	13	14	12
Average amount (\$)	812	711	575	648	1,267	638
Land tours	5	1	-	2	2	-
Average amount (\$)	52	60	-	35	65	-
Rock Islands tour.	5	-	-	2	3	-
Average amount (\$)	91	-	-	83	97	-
Night life	12	1	4	3	1	3
Average amount (\$)	166	30	140	200	300	167
Rock Islands permit.	18	1	3	5	7	2
Average amount (\$)	20	35	15	23	18	18
Shopping/souvenirs	20	4	6	4	4	2
Average amount (\$)	155	81	183	250	56	225
Other.	14	-	3	4	4	3
Average amount (\$)	416	-	185	650	343	433

Source: 2004 Palau Visitor Survey

Table 35 was asked of visitors who had transportation and other expenses in other countries. Majority of visitors in all income range stated that they did not travel nor had no other expenses in other countries.

Table 35. Transportation and expenses in other countries by Income: 2004

Transportation and expenses included in other countries	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	196	30	14	58	49	45

Not traveling to other places	123	17	11	34	34	27
Traveling to other places	73	13	3	24	15	18
Average amount	172	431	33	106	14	227

Source: 2004 Palau Visitor Survey

Table 36 shows visitors who visited other diving or snorkeling destinations by their income range. Asia and Other places visited had the most visitors stating they visited them, and also visitors with income range between \$50,000 and \$120,000 or more stated they visited these places. The more the money, the more you travel, if I may be permitted to add.

Table 36. Other diving or snorkeling destinations visited by Income: 2004

Other diving or snorkeling destinations visited	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	77	11	12	23	16	15
Guam, CNMI, and FSM.	14	3	5	3	2	1
Other Pacific.	2	1	-	1	-	-
Australia and New Zealand.	3	-	1	2	-	-
United States.	1	-	-	-	-	1
Caribbean.	5	-	-	3	1	1
Asia	22	1	1	7	6	7
Other places	30	6	5	7	7	5

Source: 2004 Palau Visitor Survey

Table 37 shows what divers and snorkelers most liked by their income range.

Table 37. Most liked about last diving/snorkeling by Income: 2004

Most liked about last diving or snorkeling in Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	154	15	45	33	36	25
Water conditions/visibility.	95	11	27	22	21	14
Other visitors on tour	28	5	10	4	7	2
Dive operators service	76	8	22	14	19	13
Clean, healthy environment	89	11	29	18	20	11
Turtles/dolphins/sharks/rays	79	9	21	17	23	9
Corals	79	9	28	17	13	12
Fish diversity	112	13	34	23	25	17
Weather.	36	3	11	8	6	8
Other.	11	1	3	2	2	3

Source: 2004 Palau Visitor Survey

Table 38 shows what divers and snorkelers disliked the most by their income range.

Table 38. Most disliked about last diving/snorkeling by Income: 2004

Most disliked about last diving or snorkeling in Palau	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	85	8	26	16	22	13
Water conditions/visibility.	24	4	7	5	3	5
Other visitors on tour	16	1	4	4	3	4
Dive operators service	3	-	-	1	1	1
Turtles/dolphins/sharks/rays	2	-	1	1	-	-
Lack of clean, healthy environment	6	-	2	1	3	-
Corals	9	1	1	2	3	2
Fish diversity	4	-	2	2	-	-
Weather.	26	2	9	4	8	3
Other.	20	3	7	4	5	1

Source: 2004 Palau Visitor Survey

Table 39 shows the response of visitors when comparing their diving or snorkeling trips by their previous trips. Visitors with income range of \$50,000 or more had a total of 5 who stated that their recent trip was worse than their previous trip.

Table 39. Diving/snorkeling trips better or worse than previous by Income: 2004

Diving or snorkeling trips better or worse than previous trips	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Better than previous trips	18	2	3	5	6	2
About the same as previous trips	26	1	5	5	8	7
Worse than previous trips.	5	-	-	2	1	2
First trip	151	19	50	33	27	22

Source: 2004 Palau Visitor Survey

Table 40 shows the response of visitors when asked about the condition of corals and reefs by their income range. Visitors whose income range is between \$25,000 and \$74,999 and \$120,000 or more had 17 who stated that the corals and reefs were either dead or bleached.

Table 40. Condition of corals and reefs on this trip by Income: 2004

Condition of corals and reefs on this trip	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Very healthy	27	3	3	7	9	5
Healthy.	73	7	23	18	14	11
Not healthy.	25	2	10	2	8	3
Dead	7	-	5	1	-	1
Bleached	10	-	5	3	-	2
Don't know	58	10	12	14	11	11

Source: 2004 Palau Visitor Survey

Table 41 was for visitors who stated that the condition of the corals and reefs were about the same as compared to their previous trip to Palau. Of these, visitors with incomes ranging from \$50,000 to \$119,999 were the majority. The majority of the respondents were first time visitors.

Table 41. Condition of corals and reefs better or worse than previous by Income: 2004

Condition of corals and reefs better than previous trips	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Better than previous trips	7	-	2	1	1	3
About the same as previous trips . . .	34	2	4	9	13	6
Worse than previous trips.	7	1	2	1	1	2
First trip	152	19	50	34	27	22

Source: 2004 Palau Visitor Survey

Table 42 shows the number of day trips to the rock islands by income. Visitors with incomes ranging from \$50,000 to \$119,999 had the most visitors who to 5 to 9 day trips to the rock islands. The majority stated they took only one day trip to the rock islands.

Table 42. Number of Day Trips to the Rock Islands by Income: 2004

Number of Day Trips to the Rock Islands	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
None	27	5	6	5	4	7
One.	121	12	38	29	22	20
Two.	10	2	4	1	2	1
Three.	7	-	2	-	4	1
Four	9	1	3	2	1	2
Five to nine	22	2	2	8	8	2
Ten or more.	4	-	3	-	1	-

Source: 2004 Palau Visitor Survey

Table 43 shows the visitors' responses to the rock island permit fee by their income range. Majority of visitors paid the permit in all income range, with a total of 61 stating they did not know there was a fee.

Table 43. Rock Island permit fee by Income: 2004

Rock Island Permit Fee	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Paid for the permit.	94	9	26	22	23	14
Did not pay for the permit	45	4	12	11	9	9
Don't know/Didn't know there was a fee	61	9	20	12	10	10

Source: 2004 Palau Visitor Survey

Table 44 shows the satisfaction rating of visitors by their income. It is interesting to note that visitors with very high income, ranging from \$50,000 and over, had the highest satisfaction overall satisfaction rating.

Table 44. Satisfaction rating by Income: 2004

Satisfaction rating	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Hotel facilities	189	19	56	43	41	30
<i>Average satisfaction</i>	3.8	3.8	3.8	4.0	3.6	3.7
Hotel service.	188	19	55	43	41	30
<i>Average satisfaction</i>	3.8	3.8	3.7	4.2	3.5	3.7
Hotel value.	181	18	52	41	41	29
<i>Average satisfaction</i>	3.6	3.3	3.8	3.8	3.4	3.5
Dive site quality.	144	15	40	33	35	21
<i>Average satisfaction</i>	4.4	4.7	4.3	4.4	4.5	4.4
Snorkeling site quality.	125	8	44	25	29	19
<i>Average satisfaction</i>	4.2	3.9	4.2	4.4	4.3	4.1
Diving/snorkeling service (guides) . .	159	15	51	33	38	22
<i>Average satisfaction</i>	4.4	4.5	4.3	4.5	4.6	4.4
Diving safety.	152	14	47	35	34	22
<i>Average satisfaction</i>	4.4	4.5	4.3	4.4	4.6	4.3
Diving facilities (boat, equipment). .	150	14	45	37	33	21
<i>Average satisfaction</i>	4.2	4.1	4.1	4.3	4.5	4.0
Diving value	148	14	46	35	32	21
<i>Average satisfaction</i>	3.9	3.6	3.8	4.0	4.1	3.8
Land tours	98	9	34	22	20	13
<i>Average satisfaction</i>	3.7	3.2	3.6	4.0	4.0	3.6
Rock Islands tours	94	9	30	21	23	11
<i>Average satisfaction</i>	4.1	3.9	3.9	4.4	4.1	4.1

Island beauty.	178	18	52	39	40	29
<i>Average satisfaction</i>	4.3	3.9	4.2	4.3	4.6	4.4
Overall value.	182	17	55	40	41	29
<i>Average satisfaction</i>	3.9	3.8	3.8	4.0	4.0	3.9

Source: 2004 Palau Visitor Survey

Table 45 shows the response stated by visitors if they would be willing to pay a certain amount of money in addition to the existing rock island permit fee by their income range. Majority of visitors in all income level stated that they would be willing to pay a \$75 conservation fee.

Table 45. Amount of money willing to pay if conservation fee by Income: 2004

Amount of money willing to pay if Conservation fee	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
\$ 5	23	2	7	6	6	2
\$ 10	33	2	12	9	6	4
\$ 20	29	3	7	6	6	7
\$ 30	24	2	8	3	5	6
\$ 50	30	3	8	7	7	5
\$ 75	50	7	13	10	12	8
Others	11	3	3	4	-	1

Source: 2004 Palau Visitor Survey

Table 46 shows the response of visitors who stated whether they would still come to Palau or not even if the conservation fee was charged. Majority of visitors in all income levels stated they would still come.

Table 46. Still would come if price of trip went up by Income: 2004

Still would come if price of trip went up	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Yes.	135	13	35	30	34	23
No	65	9	23	15	8	10

Source: 2004 Palau Visitor Survey

Table 47 shows the preference of visitors on how the conservation fee should be charged by their income level. Majority of visitors in all income level prefer a per visit conservation fee.

Table 47. Preference to charging conservation fee by Income: 2004

Preference to charging conservation fee	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Per visit (valid for up to 1 month) . . .	90	8	26	22	17	17
Per dive/snorkel/activity.	30	2	8	4	8	8
No specific preference	32	6	10	7	6	3
Other.	6	-	-	3	1	2
Don't know	42	6	14	9	10	3

Source: 2004 Palau Visitor Survey

Table 48 shows the type of organization visitors prefer to manage the conservation fee by their income level.

Table 48. Type of organization to manage conservation fee by Income: 2004

Type of organization to manage conservation fee	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Public sector (States, National Gov't).	81	6	28	18	17	12
Private sector (Operators, rentals) . .	13	-	-	4	4	5
NGOs (Palau Conservation Soc, TNC,WWF)	40	6	12	11	5	6
Public/private/NGO partnerships. . . .	12	-	3	3	2	4
Local communities.	3	-	1	1	-	1
Don't know	51	10	14	8	14	5

Source: 2004 Palau Visitor Survey

Table 49 shows the preference for paying the conservation fee by income level of visitors.

Table 49. Preference for paying fee by Income: 2004

Preference for paying fee	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
One fee for the whole of Palau	130	11	35	29	28	27
Fee per state.	18	2	4	7	4	1

Fee per site	9	2	5	-	1	1
No preference.	31	7	9	5	6	4
Other preference	12	-	5	4	3	-

Source: 2004 Palau Visitor Survey

Table 50 shows the age group and sex of visitors by their income level. The table shows that visitors aged 30 and above have higher income.

Table 50. Age Group and Sex by Income: 2004

Age Group	Total	Less than \$25,000	\$25000 to \$49,999	\$50000 to \$74,999	\$75000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
15 to 19 years	-	-	-	-	-	-
20 to 24 years	6	3	2	1	-	-
25 to 29 years	38	6	21	7	2	2
30 to 34 years	45	4	17	8	11	5
35 to 39 years	31	2	13	8	8	-
40 to 44 years	24	3	1	5	10	5
45 to 49 years	11	2	2	2	1	4
50 to 54 years	14	-	1	2	3	8

55 to 59 years		16	-	1	6	3	6
60 years and over.		15	2	-	6	4	3
	Males:	122	10	27	33	29	23
15 to 19 years		-	-	-	-	-	-
20 to 24 years		4	2	2	-	-	-
25 to 29 years		17	3	9	5	-	-
30 to 34 years		22	1	7	4	7	3
35 to 39 years		20	1	6	7	6	-
40 to 44 years		16	-	1	4	7	4
45 to 49 years		9	1	1	2	1	4
50 to 54 years		11	-	1	1	3	6
55 to 59 years		12	-	-	5	3	4
60 years and over.		11	2	-	5	2	2
	Females:	78	12	31	12	13	10
15 to 19 years		-	-	-	-	-	-
20 to 24 years		2	1	-	1	-	-
25 to 29 years		21	3	12	2	2	2
30 to 34 years		23	3	10	4	4	2
35 to 39 years		11	1	7	1	2	-
40 to 44 years		8	3	-	1	3	1
45 to 49 years		2	1	1	-	-	-
50 to 54 years		3	-	-	1	-	2
55 to 59 years		4	-	1	1	-	2
60 years and over.		4	-	-	1	2	1

Source: 2004 Palau Visitor Survey

Table 51 shows the current residence of visitors by their income level. Visitors who stated their current or present residence as the United States had the most with income level of \$120,000 or more. Japan had the most visitors who stated their income level as being \$75,000 to \$119,999.

Table 51. Current residence by Income: 2004

Current residence	Total	Less than \$25,000	\$25000 to \$49,999	\$50000 to \$74,999	\$75000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
United States.	30	2	2	7	9	10
Japan.	58	8	17	10	14	9
CNMI	4	2	1	-	-	1

ROC Taiwan	50	3	28	11	5	3
FSM.	-	-	-	-	-	-
Guam	10	-	3	2	3	2
Great Britain.	2	-	-	1	-	1
Australia.	5	1	2	-	-	2
New Zealand.	1	-	-	1	-	-
Germany.	5	-	-	3	2	-
Other.	35	6	5	10	9	5

Source: 2004 Palau Visitor Survey

Table 52 shows the highest level of education completed for visitors by their income. Not surprisingly, the higher the education, the higher the income.

Table 52. Highest level of education completed by Income: 2004

Highest level of Education completed	Total	Less than \$25,000	\$25000 to \$49,999	\$50000 to \$74,999	\$75000 to \$119,999	\$120,000 or more
Total:	200	22	58	45	42	33
Not a high school graduate	2	-	-	-	2	-
High school graduate	18	3	8	3	1	3
Some college or university	32	8	15	3	2	4
Finished college (BA/BS)	81	9	25	19	17	11
Advanced degree (MS,PhD)	67	2	10	20	20	15

Source: 2004 Palau Visitor Survey

CONCLUSIONS

It is important to note that this is only a pilot survey, and the product will be used to learn the rest of the valuation process with Herman Cesar.

Table 1. Times Visited, Nights, Activities, and Factors Selecting Palau by Present Residence: 2004

Characteristics	Total	United States	Guam & CNMI	Japan	Taiwan	Others
TIMES VISITED PALAU						
Total	200	30	14	58	50	48
First visit	132	17	2	30	49	34
Second visit	27	5	-	14	1	7
Third visit	11	5	1	3	-	2
Fourth visit	5	1	1	3	-	-
Fifth visit or more	25	2	10	8	-	5
Not stated	-	-	-	-	-	-
NIGHTS SPENT IN PALAU						
Total	199	30	13	58	50	48
One	6	1	3	2	-	-
Two	8	2	1	-	1	4
Three	59	3	4	1	49	2
Four	25	3	1	15	-	6
Five	53	5	3	40	-	5
Six	5	1	1	-	-	3
Seven	19	9	-	-	-	10
Eight to ten	9	3	-	-	-	6
Eleven to fourteen	9	1	-	-	-	8
More than fourteen	6	2	-	-	-	4
Not stated	-	-	-	-	-	-
ACTIVITIES WHILE ON PALAU						
Total with at least one	200	30	14	58	50	48
Diving	115	21	3	53	11	27
Snorkling	103	17	4	10	48	24
Kayaking	46	3	2	4	29	8
Sports fishing	20	-	1	2	15	2
Rock Islands tour	57	7	4	6	27	13
Land tour	70	10	2	5	36	17
Business	25	4	8	-	-	13
Conference/seminar/workshop	2	-	-	-	-	2
Honeymoon/wedding	1	-	-	-	1	-
Visiting friends/family	14	2	6	1	1	4
Night life	26	4	5	1	9	7
Other	8	1	1	-	3	3
FACTORS FOR SELECTING PALAU						
Total with at least one	200	30	14	58	50	48
Nearby to residence	18	1	3	2	9	3
Cheap destination	7	1	1	1	3	1
Safe destination	23	-	1	3	12	7
Reputation as dive destination	116	16	2	48	27	23
Environment	63	6	4	8	37	8
Other	47	11	8	4	5	19
Don't know	1	-	-	1	-	-
TYPE OF TOUR						
Total	200	30	14	58	50	48
Individual tour	66	15	10	4	-	37
Package tour	127	14	1	54	50	8
Average price of tour package (\$)	1,784	4,080	810	2,130	653	2,628
Other	7	1	3	-	-	3
EXPENDITURES COVERED BY PACKAGE						
Total, at least one expenditure	123	14	1	52	48	8
Airfare	113	11	1	51	44	6
Hotel/lodgings	119	14	1	51	45	8
Meals	90	11	-	32	43	4
Ground transport	66	10	-	12	40	4
Rock Islands tour	35	3	1	1	29	1
Diving/snorkeling	107	14	1	43	44	5
Land tours	33	-	-	1	32	-
Kayaing	23	1	1	-	21	-
Rock Islands permit	16	1	-	1	14	-
Other	3	1	-	2	-	-

Source: 2004 Palau Visitor Survey

Table 2. Parts of Package Tour by Present Residence: 2004

Characteristics	Total	United States	Guam & CNMI	Japan	Taiwan	Others
PAY IN ADDITION TO PACKAGE						
Total paying addition to package.	77	12	1	46	12	6
Average amount (\$)	401	645	350	346	234	675
Meals.	51	6	1	37	2	5
Average amount (\$)	148	164	150	112	281	344
Transport.	19	4	1	9	1	4
Average amount (\$)	167	675	50	12	28	73
Snorkeling	6	1	-	3	2	-
Average amount (\$)	61	61	-	49	78	-
Diving	29	1	-	28	-	-
Average amount (\$)	266	600	-	254	-	-
Kayaking	4	-	-	2	2	-
Average amount (\$)	214	-	-	150	278	-
Land tours	13	4	-	5	2	2
Average amount (\$)	151	70	-	94	58	550
Rock Islands tour.	5	-	-	4	-	1
Average amount (\$)	117	-	-	97	-	200
Night life	5	2	-	1	1	1
Average amount (\$)	97	135	-	15	100	100
Rock Islands permit.	18	3	-	10	-	5
Average amount (\$)	21	27	-	15	-	28
Shopping/souvenirs	46	7	1	27	7	4
Average amount (\$)	124	266	150	102	60	125
Other.	7	2	-	1	4	-
Average amount (\$)	297	450	-	300	219	-
AMOUNTS FOR PEOPLE NOT ON PACKAGE TOUR						
Total not on package tour	65	14	12	4	-	35
Average amount (\$)	2,502	2,627	649	1,296	-	3,224
Airfare.	48	11	5	2	-	30
Average amount (\$)	1,536	1,450	530	743	-	1,788
Meals.	45	10	9	2	-	24
Average amount (\$)	219	284	142	140	-	227
Transport.	29	6	4	1	-	18
Average amount (\$)	184	218	97	150	-	193
Snorkeling	6	1	-	-	-	5
Average amount (\$)	448	100	-	-	-	517
Diving	25	7	1	2	-	15
Average amount (\$)	632	440	250	435	-	773
Kayaking	6	2	-	-	-	4
Average amount (\$)	164	55	-	-	-	219
Hotels/lodgings.	52	9	8	3	-	32
Average amount (\$)	812	1,220	237	511	-	870
Land tours	5	1	-	-	-	4
Average amount (\$)	52	40	-	-	-	55
Rock Islands tour.	5	1	-	-	-	4
Average amount (\$)	91	80	-	-	-	94
Night life	12	1	4	-	-	7
Average amount (\$)	166	300	230	-	-	110
Rock Islands permit.	18	4	-	2	-	12
Average amount (\$)	20	20	-	18	-	20
Shopping/souvenirs	20	4	3	1	-	12
Average amount (\$)	155	144	127	30	-	176
Other.	14	3	1	2	-	8
Average amount (\$)	416	447	25	400	-	458

Source: 2004 Palau Visitor Survey

Table 3. Other Country Travel, Likes and Dislikes in Palau by Present Residence: 2004

Characteristics	Total	United States	Guam & CNMI	Japan	Taiwan	Others
AMOUNTS FOR TRAVEL IN OTHER PLACES						
Total	196	30	14	58	49	45
Not travelling to other places	123	17	11	34	34	27
Travelling to other places	73	13	3	24	15	18
Average amount	-	-	-	-	-	-
OTHER DIVING/SNORKELING LOCATIONS						
Total going to other places.	77	16	3	34	2	22
Guam, CNMI, and FSM.	14	2	2	8	-	2
Other Pacific.	2	1	-	-	-	1
Australia and New Zealand.	3	1	-	1	-	1
United States.	1	1	-	-	-	-
Caribbean.	5	5	-	-	-	-
Asia	22	1	1	5	-	15
Other places	30	5	-	20	2	3
MOST LIKED ABOUT DIVING						
Total with at least one like.	154	27	6	54	35	32
Water conditions/visibility.	95	16	4	27	27	21
Other visitors on tour	28	8	-	12	5	3
Dive operators service	76	15	1	33	12	15
Clean, healthy environment	89	13	2	30	25	19
Turtles/dolphins/sharks/rays	79	13	4	29	9	24
Corals	79	17	3	18	23	18
Fish diversity	112	23	3	44	20	22
Weather.	36	9	1	8	8	10
Other.	11	2	-	6	2	1
MOST DISLIKED ABOUT DIVING						
Total with at least one dislike	85	15	6	31	17	16
Water conditions/visibility.	24	6	-	13	2	3
Other visitors on tour	16	2	2	4	3	5
Dive operators service	3	2	-	1	-	-
Turtles/dolphins/sharks/rays	2	1	-	-	1	-
Lack of clean, healthy environment	6	-	1	1	3	1
Corals	9	2	-	5	-	2
Fish diversity	4	1	-	1	2	-
Weather.	26	3	1	16	4	2
Other.	20	5	4	2	4	5
COMPARED TO PREVIOUS DIVING						
Total	200	30	14	58	50	48
Better than previous trips	18	6	1	11	-	-
About the same as previous trips	26	4	4	13	1	4
Worse than previous trips.	5	1	-	3	-	1
First trip	151	19	9	31	49	43
CONDITION OF CORALS AND REEFS						
Total	200	30	14	58	50	48
Corals were:						
Very healthy	27	8	2	3	10	4
Healthy.	73	12	3	20	22	16
Not healthy.	25	2	-	16	3	4
Dead	7	-	1	2	3	1
Bleached	10	2	-	-	6	2
Don't know	58	6	8	17	6	21
COMPARED CONDITION OF CORALS AND REEFS						
Total	200	30	14	58	50	48
Better than previous trips	7	3	3	1	-	-
About the same as previous trips	34	7	2	21	-	4
Worse than previous trips.	7	1	-	4	1	1
First trip	152	19	9	32	49	43
NUMBER OF DAY TRIPS TO ROCK ISLANDS						
Total	200	30	14	58	50	48
None	27	3	8	1	1	14
One.	121	15	3	45	46	12
Two.	10	2	2	3	3	-
Three.	7	2	1	1	-	3
Four	9	2	-	5	-	2
Five to nine	22	5	-	3	-	14
Ten or more.	4	1	-	-	-	3

Source: 2004 Palau Visitor Survey

Table 4. Satisfaction by Present Residence: 2004

Characteristics	Total	United States	Guam & CNMI	Japan	Taiwan	Others
PAY FEE FOR ROCK ISLANDS PERMIT						
Total	200	30	14	58	50	48
Paid for the permit.	94	21	4	31	10	28
Did not pay for the permit	45	3	2	20	16	4
Don't know/Didn't know there was a fee	61	6	8	7	24	16
SATISFACTION ABOUT TOURISM [5 is very satisfied, 1 is very dissatisfied]						
Hotel facilities	189	27	13	54	48	47
Average satisfaction	3.8	4.1	3.7	3.5	4.0	3.7
Hotel service.	188	27	13	53	48	47
Average satisfaction	3.8	4.3	3.4	3.5	3.9	3.8
Hotel value.	181	25	13	50	48	45
Average satisfaction	3.6	3.7	3.3	3.4	4.0	3.4
Dive site quality.	144	22	6	51	37	28
Average satisfaction	4.4	4.4	4.8	4.4	4.2	4.8
Snorkeling site quality.	125	19	6	28	48	24
Average satisfaction	4.2	4.2	4.7	4.1	4.1	4.3
Diving/snorkeling service (guides) . .	159	24	6	52	46	31
Average satisfaction	4.4	4.6	4.8	4.5	4.2	4.5
Diving safety.	152	22	6	53	43	28
Average satisfaction	4.4	4.6	4.7	4.4	4.2	4.5
Diving facilities (boat, equipment). .	150	23	6	53	41	27
Average satisfaction	4.2	4.7	4.7	4.0	4.0	4.4
Diving value	148	23	6	52	42	25
Average satisfaction	3.9	4.3	4.5	3.5	3.9	4.0
Land tours	98	14	5	18	46	15
Average satisfaction	3.7	4.1	4.4	3.2	3.7	4.0
Rock Islands tours	94	15	6	14	44	15
Average satisfaction	4.1	4.7	4.8	3.0	3.9	4.5
Island beauty.	178	28	13	48	48	41
Average satisfaction	4.3	4.6	4.7	4.3	4.0	4.4
Overall value.	182	27	12	52	48	43
Average satisfaction	3.9	4.2	4.3	3.4	4.0	4.1
FEE INCREASE FOR CORAL PROTECTION						
Total	200	30	14	58	50	48
\$ 5.	23	6	-	5	6	6
\$ 10	33	7	2	8	8	8
\$ 20	29	2	2	5	9	11
\$ 30	24	4	3	4	8	5
\$ 50	30	5	2	7	9	7
\$ 75	50	3	1	29	10	7
Others	11	3	4	-	-	4
IF PRICE RAISED, STILL COME						
Total	200	30	14	58	50	48
Yes.	135	26	11	36	30	32
No	65	4	3	22	20	16
METHOD OF CHARGING CONSERVATION FEE						
Total	200	30	14	58	50	48
Per visit (valid for up to 1 month). .	90	20	6	20	18	26
Per dive/snorkel/activity.	30	2	4	14	6	4
No specific preference	32	3	1	8	15	5
Other.	6	-	1	2	1	2
Don't know	42	5	2	14	10	11
ORGANIZATION FOR MARINE MANAGEMENT						
Total	200	30	14	58	50	48
Public sector (States, National Govt). .	81	9	2	34	24	12
Private sector (Operators, rentals). .	13	4	2	1	3	3
NGOs (Palau Conservation Soc, TNC, WWF)	40	9	4	6	12	9
Public/private/NGO partnerships. . . .	12	1	4	2	-	5
Local communities.	3	-	-	1	-	2
Don't know	51	7	2	14	11	17
STATE OR NATIONAL FEES						
Total	200	30	14	58	50	48
One fee for the whole of Palau	130	20	11	39	27	33
Fee per state.	18	4	-	8	1	5
Fee per site	9	1	2	1	4	1
No preference.	31	5	1	10	9	6
Other preference	12	-	-	-	9	3

Source: 2004 Palau Visitor Survey

Table 5. Demographics by Present Residence: 2004

Characteristics	Total	United States	Guam & CNMI	Japan	Taiwan	Others
AGE AND SEX						
Total	200	30	14	58	50	48
15 to 19 years	-	-	-	-	-	-
20 to 24 years	6	1	-	1	2	2
25 to 29 years	38	2	2	17	12	5
30 to 34 years	45	2	1	17	17	8
35 to 39 years	31	2	2	8	11	8
40 to 44 years	24	2	2	7	3	10
45 to 49 years	11	1	3	2	1	4
50 to 54 years	14	5	2	4	-	3
55 to 59 years	16	8	2	-	2	4
60 years and over	15	7	-	2	2	4
Males	122	19	9	31	27	36
15 to 19 years	-	-	-	-	-	-
20 to 24 years	4	1	-	1	-	2
25 to 29 years	17	1	1	6	6	3
30 to 34 years	22	1	1	6	9	5
35 to 39 years	20	1	-	6	6	7
40 to 44 years	16	2	2	6	2	4
45 to 49 years	9	1	2	2	-	4
50 to 54 years	11	4	2	2	-	3
55 to 59 years	12	5	1	-	2	4
60 years and over	11	3	-	2	2	4
Females	78	11	5	27	23	12
15 to 19 years	-	-	-	-	-	-
20 to 24 years	2	-	-	-	2	-
25 to 29 years	21	1	1	11	6	2
30 to 34 years	23	1	-	11	8	3
35 to 39 years	11	1	2	2	5	1
40 to 44 years	8	-	-	1	1	6
45 to 49 years	2	-	1	-	1	-
50 to 54 years	3	1	-	2	-	-
55 to 59 years	4	3	1	-	-	-
60 years and over	4	4	-	-	-	-
Current residence						
Total	200	30	14	58	50	48
United States	30	30	-	-	-	-
Japan	58	-	-	58	-	-
CNMI	4	-	4	-	-	-
ROC Taiwan	50	-	-	-	50	-
FSM	-	-	-	-	-	-
Guam	10	-	10	-	-	-
Great Britain	2	-	-	-	-	2
Australia	5	-	-	-	-	5
New Zealand	1	-	-	-	-	1
Germany	5	-	-	-	-	5
Other	35	-	-	-	-	35
HIGHEST LEVEL OF EDUCATION						
Total	200	30	14	58	50	48
Not a high school graduate	2	-	-	1	1	-
High school graduate	18	1	-	12	-	5
Some college or university	32	3	6	9	7	7
Finished college (BA/BS)	81	10	5	30	26	10
Advanced degree (MS,PhD)	67	16	3	6	16	26
INCOME IN DOLLARS						
Total reporting income	200	30	14	58	50	48
Less than \$25,000	22	2	2	8	3	7
\$25,000 to \$49,999	58	2	4	17	28	7
\$50,000 to \$74,999	45	7	2	10	11	15
\$75,000 to \$99,999	30	7	3	11	5	4
\$100,000 to \$119,999	12	2	-	3	-	7
\$120,000 to \$139,999	9	1	-	3	2	3
\$140,000 and above	24	9	3	6	1	5

Source: 2004 Palau Visitor Survey

Table 6. Times Visited, Nights, Activities, and Factors Selecting Palau by Income: 2004

Characteristics	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
TIMES VISITED PALAU						
Total	200	22	58	45	42	33
First visit	132	17	45	30	24	16
Second visit	27	2	5	6	7	7
Third visit	11	1	3	2	2	3
Fourth visit	5	-	1	1	2	1
Fifth visit or more	25	2	4	6	7	6
Not stated	-	-	-	-	-	-
NIGHTS SPENT IN PALAU						
Total	199	22	58	45	42	32
One	6	1	2	-	2	1
Two	8	1	-	3	-	4
Three	59	4	29	12	8	6
Four	25	2	7	5	6	5
Five	53	10	14	10	12	7
Six	5	-	1	-	3	1
Seven	19	1	-	7	7	4
Eight to ten	9	-	3	3	2	1
Eleven to fourteen	9	-	2	5	1	1
More than fourteen	6	3	-	-	1	2
Not stated	-	-	-	-	-	-
ACTIVITIES WHILE ON PALAU						
Total with at least one	200	22	58	45	42	33
Diving	115	11	28	27	32	17
Snorkling	103	6	36	23	21	17
Kayaking	46	3	19	11	10	3
Sports fishing	20	2	13	2	2	1
Rock Islands tour	57	6	21	12	12	6
Land tour	70	7	25	19	10	9
Business	25	3	2	5	6	9
Conference/seminar/workshop	2	1	-	-	1	-
Honeymoon/wedding	1	-	-	1	-	-
Visiting friends/family	14	4	4	3	-	3
Night life	26	3	10	5	4	4
Other	8	1	2	-	3	2
FACTORS FOR SELECTING PALAU						
Total with at least one	200	22	58	45	42	33
Nearby to residence	18	5	5	4	3	1
Cheap destination	7	1	2	2	2	-
Safe destination	23	3	4	8	6	2
Reputation as dive destination	116	12	38	26	24	16
Environment	63	3	30	13	8	9
Other	47	6	5	10	13	13
Don't know	1	-	-	1	-	-
TYPE OF TOUR						
Total	200	22	58	45	42	33
Individual tour	66	9	9	19	13	16
Package tour	127	12	48	25	26	16
Average price of tour package (\$).	1,784	1,743	1,277	1,830	2,420	2,235
Other	7	1	1	1	3	1
EXPENDITURES COVERED BY PACKAGE						
Total, at least one expenditure	123	12	46	24	26	15
Airfare	113	12	45	21	23	12
Hotel/lodgings	119	12	44	23	25	15
Meals	90	11	34	16	20	9
Ground transport	66	5	28	16	12	5
Rock Islands tour	35	3	19	6	5	2
Diving/snorkeling	107	11	42	22	22	10
Land tours	33	3	18	6	6	-
Kayaing	23	3	15	3	2	-
Rock Islands permit	16	2	11	1	2	-
Other	3	-	1	-	1	1

Source: 2004 Palau Visitor Survey

Table 7. Parts of Package Tour by Income: 2004

Characteristics	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
PAY IN ADDITION TO PACKAGE						
Total paying addition to package.	77	8	26	14	18	11
Average amount (\$)	401	404	274	332	490	640
Meals.	51	5	15	9	12	10
Average amount (\$)	148	118	118	130	135	241
Transport.	19	3	7	-	5	4
Average amount (\$)	167	41	22	-	534	56
Snorkeling	6	-	3	1	1	1
Average amount (\$)	61	-	65	61	87	20
Diving	29	3	8	5	6	7
Average amount (\$)	266	372	268	232	278	234
Kayaking	4	-	1	1	2	-
Average amount (\$)	214	-	56	500	150	-
Land tours	13	-	3	3	3	4
Average amount (\$)	151	-	72	47	64	355
Rock Islands tour.	5	-	1	1	2	1
Average amount (\$)	117	-	100	100	94	200
Night life	5	1	3	1	-	-
Average amount (\$)	97	70	133	15	-	-
Rock Islands permit.	18	1	9	3	3	2
Average amount (\$)	21	30	21	22	15	23
Shopping/souvenirs	46	7	16	7	11	5
Average amount (\$)	124	143	71	119	186	136
Other.	7	1	3	2	-	1
Average amount (\$)	297	300	255	306	-	400
AMOUNTS FOR PEOPLE NOT ON PACKAGE TOUR						
Total not on package tour	65	8	9	16	16	16
Average amount (\$)	2,502	2,151	1,818	2,331	3,070	2,664
Airfare.	48	5	4	14	12	13
Average amount (\$)	1,536	1,900	1,550	1,160	1,428	1,897
Meals.	45	5	6	11	10	13
Average amount (\$)	219	186	258	158	271	225
Transport.	29	4	2	9	6	8
Average amount (\$)	184	113	200	107	250	251
Snorkeling	6	-	-	3	3	-
Average amount (\$)	448	-	-	128	767	-
Diving	25	1	3	8	7	6
Average amount (\$)	632	900	833	605	639	513
Kayaking	6	-	-	2	3	1
Average amount (\$)	164	-	-	75	275	10
Hotels/lodgings.	52	7	6	13	14	12
Average amount (\$)	812	711	575	648	1,267	638
Land tours	5	1	-	2	2	-
Average amount (\$)	52	60	-	35	65	-
Rock Islands tour.	5	-	-	2	3	-
Average amount (\$)	91	-	-	83	97	-
Night life	12	1	4	3	1	3
Average amount (\$)	166	30	140	200	300	167
Rock Islands permit.	18	1	3	5	7	2
Average amount (\$)	20	35	15	23	18	18
Shopping/souvenirs	20	4	6	4	4	2
Average amount (\$)	155	81	183	250	56	225
Other.	14	-	3	4	4	3
Average amount (\$)	416	-	185	650	343	433

Source: 2004 Palau Visitor Survey

Table 8. Other Country Travel, Likes and Dislikes in Palau by Income: 2004

Characteristics	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
AMOUNTS FOR TRAVEL IN OTHER PLACES						
Total	196	22	58	42	42	32
Not travelling to other places	123	16	36	23	26	22
Travelling to other places	73	6	22	19	16	10
Average amount	-	-	-	-	-	-
OTHER DIVING/SNORKELING LOCATIONS						
Total going to other places	77	11	12	23	16	15
Guam, CNMI, and FSM	14	3	5	3	2	1
Other Pacific	2	1	-	1	-	-
Australia and New Zealand	3	-	1	2	-	-
United States	1	-	-	-	-	1
Caribbean	5	-	-	3	1	1
Asia	22	1	1	7	6	7
Other places	30	6	5	7	7	5
MOST LIKED ABOUT DIVING						
Total with at least one like	154	15	45	33	36	25
Water conditions/visibility	95	11	27	22	21	14
Other visitors on tour	28	5	10	4	7	2
Dive operators service	76	8	22	14	19	13
Clean, healthy environment	89	11	29	18	20	11
Turtles/dolphins/sharks/rays	79	9	21	17	23	9
Corals	79	9	28	17	13	12
Fish diversity	112	13	34	23	25	17
Weather	36	3	11	8	6	8
Other	11	1	3	2	2	3
MOST DISLIKED ABOUT DIVING						
Total with at least one dislike	85	8	26	16	22	13
Water conditions/visibility	24	4	7	5	3	5
Other visitors on tour	16	1	4	4	3	4
Dive operators service	3	-	-	1	1	1
Turtles/dolphins/sharks/rays	2	-	1	1	-	-
Lack of clean, healthy environment	6	-	2	1	3	-
Corals	9	1	1	2	3	2
Fish diversity	4	-	2	2	-	-
Weather	26	2	9	4	8	3
Other	20	3	7	4	5	1
COMPARED TO PREVIOUS DIVING						
Total	200	22	58	45	42	33
Better than previous trips	18	2	3	5	6	2
About the same as previous trips	26	1	5	5	8	7
Worse than previous trips	5	-	-	2	1	2
First trip	151	19	50	33	27	22
CONDITION OF CORALS AND REEFS						
Total	200	22	58	45	42	33
Corals were:						
Very healthy	27	3	3	7	9	5
Healthy	73	7	23	18	14	11
Not healthy	25	2	10	2	8	3
Dead	7	-	5	1	-	1
Bleached	10	-	5	3	-	2
Don't know	58	10	12	14	11	11
COMPARED CONDITION OF CORALS AND REEFS						
Total	200	22	58	45	42	33
Better than previous trips	7	-	2	1	1	3
About the same as previous trips	34	2	4	9	13	6
Worse than previous trips	7	1	2	1	1	2
First trip	152	19	50	34	27	22
NUMBER OF DAY TRIPS TO ROCK ISLANDS						
Total	200	22	58	45	42	33
None	27	5	6	5	4	7
One	121	12	38	29	22	20
Two	10	2	4	1	2	1
Three	7	-	2	-	4	1
Four	9	1	3	2	1	2
Five to nine	22	2	2	8	8	2
Ten or more	4	-	3	-	1	-

Source: 2004 Palau Visitor Survey

Table 9. Satisfaction by Income: 2004

Characteristics	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
PAY FEE FOR ROCK ISLANDS PERMIT						
Total	200	22	58	45	42	33
Paid for the permit.	94	9	26	22	23	14
Did not pay for the permit	45	4	12	11	9	9
Don't know/Didn't know there was a fee	61	9	20	12	10	10
SATISFACTION ABOUT TOURISM [5 is very satisfied, 1 is very dissatisfied]						
Hotel facilities	189	19	56	43	41	30
Average satisfaction	3.8	3.8	3.8	4.0	3.6	3.7
Hotel service.	188	19	55	43	41	30
Average satisfaction	3.8	3.8	3.7	4.2	3.5	3.7
Hotel value.	181	18	52	41	41	29
Average satisfaction	3.6	3.3	3.8	3.8	3.4	3.5
Dive site quality.	144	15	40	33	35	21
Average satisfaction	4.4	4.7	4.3	4.4	4.5	4.4
Snorkeling site quality.	125	8	44	25	29	19
Average satisfaction	4.2	3.9	4.2	4.4	4.3	4.1
Diving/snorkeling service (guides) . .	159	15	51	33	38	22
Average satisfaction	4.4	4.5	4.3	4.5	4.6	4.4
Diving safety.	152	14	47	35	34	22
Average satisfaction	4.4	4.5	4.3	4.4	4.6	4.3
Diving facilities (boat, equipment). .	150	14	45	37	33	21
Average satisfaction	4.2	4.1	4.1	4.3	4.5	4.0
Diving value	148	14	46	35	32	21
Average satisfaction	3.9	3.6	3.8	4.0	4.1	3.8
Land tours	98	9	34	22	20	13
Average satisfaction	3.7	3.2	3.6	4.0	4.0	3.6
Rock Islands tours	94	9	30	21	23	11
Average satisfaction	4.1	3.9	3.9	4.4	4.1	4.1
Island beauty.	178	18	52	39	40	29
Average satisfaction	4.3	3.9	4.2	4.3	4.6	4.4
Overall value.	182	17	55	40	41	29
Average satisfaction	3.9	3.8	3.8	4.0	4.0	3.9
FEE INCREASE FOR CORAL PROTECTION						
Total	200	22	58	45	42	33
\$ 5	23	2	7	6	6	2
\$ 10	33	2	12	9	6	4
\$ 20	29	3	7	6	6	7
\$ 30	24	2	8	3	5	6
\$ 50	30	3	8	7	7	5
\$ 75	50	7	13	10	12	8
Others	11	3	3	4	-	1
IF PRICE RAISED, STILL COME						
Total	200	22	58	45	42	33
Yes.	135	13	35	30	34	23
No	65	9	23	15	8	10
METHOD OF CHARGING CONSERVATION FEE						
Total	200	22	58	45	42	33
Per visit (valid for up to 1 month). .	90	8	26	22	17	17
Per dive/snorkel/activity.	30	2	8	4	8	8
No specific preference	32	6	10	7	6	3
Other.	6	-	-	3	1	2
Don't know	42	6	14	9	10	3
ORGANIZATION FOR MARINE MANAGEMENT						
Total	200	22	58	45	42	33
Public sector (States, National Govt). .	81	6	28	18	17	12
Private sector (Operators, rentals). .	13	-	-	4	4	5
NGOs (Palau Conservation Soc, TNC,WWF)	40	6	12	11	5	6
Public/private/NGO partnerships. . . .	12	-	3	3	2	4
Local communities.	3	-	1	1	-	1
Don't know	51	10	14	8	14	5
STATE OR NATIONAL FEES						
Total	200	22	58	45	42	33
One fee for the whole of Palau	130	11	35	29	28	27
Fee per state.	18	2	4	7	4	1
Fee per site	9	2	5	-	1	1
No preference.	31	7	9	5	6	4
Other preference	12	-	5	4	3	-

Source: 2004 Palau Visitor Survey

Table 10. Demographics by Income: 2004

Characteristics	Total	Less than \$25,000	\$25,000 to \$49,999	\$50,000 to \$74,999	\$75,000 to \$119,999	\$120,000 or more
AGE AND SEX						
Total	200	22	58	45	42	33
15 to 19 years	-	-	-	-	-	-
20 to 24 years	6	3	2	1	-	-
25 to 29 years	38	6	21	7	2	2
30 to 34 years	45	4	17	8	11	5
35 to 39 years	31	2	13	8	8	-
40 to 44 years	24	3	1	5	10	5
45 to 49 years	11	2	2	2	1	4
50 to 54 years	14	-	1	2	3	8
55 to 59 years	16	-	1	6	3	6
60 years and over	15	2	-	6	4	3
Males.	122	10	27	33	29	23
15 to 19 years	-	-	-	-	-	-
20 to 24 years	4	2	2	-	-	-
25 to 29 years	17	3	9	5	-	-
30 to 34 years	22	1	7	4	7	3
35 to 39 years	20	1	6	7	6	-
40 to 44 years	16	-	1	4	7	4
45 to 49 years	9	1	1	2	1	4
50 to 54 years	11	-	1	1	3	6
55 to 59 years	12	-	-	5	3	4
60 years and over	11	2	-	5	2	2
Females.	78	12	31	12	13	10
15 to 19 years	-	-	-	-	-	-
20 to 24 years	2	1	-	1	-	-
25 to 29 years	21	3	12	2	2	2
30 to 34 years	23	3	10	4	4	2
35 to 39 years	11	1	7	1	2	-
40 to 44 years	8	3	-	1	3	1
45 to 49 years	2	1	1	-	-	-
50 to 54 years	3	-	-	1	-	2
55 to 59 years	4	-	1	1	-	2
60 years and over	4	-	-	1	2	1
Current residence						
Total	200	22	58	45	42	33
United States	30	2	2	7	9	10
Japan	58	8	17	10	14	9
CNMI	4	2	1	-	-	1
ROC Taiwan	50	3	28	11	5	3
FSM	-	-	-	-	-	-
Guam	10	-	3	2	3	2
Great Britain	2	-	-	1	-	1
Australia	5	1	2	-	-	2
New Zealand	1	-	-	1	-	-
Germany	5	-	-	3	2	-
Other	35	6	5	10	9	5
HIGHEST LEVEL OF EDUCATION						
Total	200	22	58	45	42	33
Not a high school graduate	2	-	-	-	2	-
High school graduate	18	3	8	3	1	3
Some college or university	32	8	15	3	2	4
Finished college (BA/BS)	81	9	25	19	17	11
Advanced degree (MS,PhD)	67	2	10	20	20	15
INCOME IN DOLLARS						
Total reporting income	200	22	58	45	42	33
Less than \$25,000	22	22	-	-	-	-
\$25,000 to \$49,999	58	-	58	-	-	-
\$50,000 to \$74,999	45	-	-	45	-	-
\$75,000 to \$99,999	30	-	-	-	30	-
\$100,000 to \$119,999	12	-	-	-	12	-
\$120,000 to \$139,999	9	-	-	-	-	9
\$140,000 and above	24	-	-	-	-	24

Source: 2004 Palau Visitor Survey



Palau Visitor Survey 2004

1. How many times have you visited Palau?	11. Have you visited other diving/snorkeling destinations in the last 12 months? 1. Yes 2. No If yes, where?:																																																															
2. How many nights did you spend in Palau on this trip?	12. What did you like most about your last diving / snorkeling in Palau? <i>(Please circle the number of all those that apply)</i> 1. Water conditions/visibility 6. Corals 2. Other visitors on tour 7. Fish diversity 3. Dive operators service 8. Weather 4. Clean, healthy environment 9. Other 5. Turtles/dolphins/sharks/rays																																																															
3. Which activities did you engage in during your stay? <i>(Please circle the number of all those that apply)</i> 1. Diving 7. Business 2. Snorkeling 8. Conference/Seminar/Workshop 3. Kayaking 9. Honeymoon/Wedding 4. Sports Fishing 10. Visiting friends/family 5. Rock Islands Tour 11. Night life 6. Land Tour 12. Other	13. What did you dislike most about your last diving / snorkeling in Palau? <i>(Please circle the number of all those that apply)</i> 1. Water conditions/visibility 6. Corals 2. Other visitors on tour 7. Fish diversity 3. Dive operators service 8. Weather 4. Turtles/dolphins/sharks/rays 9. Other 5. (Lack of) Clean, healthy environment																																																															
4. What factors influenced your decision to select Palau for this visit? <i>(Please circle the number of all those that apply)</i> 1. Nearby to where you reside 5. Environment 2. Cheap destination 6. Other..... 3. Safe destination 7. Don't know 4. Reputation as premier dive destination	14. Was the trip better or worse than your previous diving / snorkeling in Palau? <i>(Circle one)</i> 1. Better 2. About the same 3. Worse 4. NA (first visit)																																																															
5. Are you traveling on and individual tour or package tour? <i>(circle one)</i> 1. Individual tour 2. Package tour 3. Other:..... <i>If you answered 1 above, please go to question number 9</i>	15. On this recent trip, were the corals and reefs you visited mostly? <i>(Circle one)</i> 1. Very Healthy 2. Healthy 3. Not healthy 4. Dead 5. Bleached 6. Don't know																																																															
6. If you are on a package tour, what was the price of the total package? <i>(please give amounts per person if you are traveling with your partner or others)</i> \$.....	16. Was the condition of corals and reefs better or worse than your previous diving / snorkeling in Palau? <i>(Circle one)</i> 1. Better 2. About the same 3. Worse 4. NA (first visit))																																																															
7. If you are on a package tour, please indicate what expenditures were covered by your prepaid package <i>(Please circle the number of all those that apply)</i> 1. Airfare 5. Rock Islands tour 8. Kayaking 2. Hotel / lodgings 6. Diving/Snorkeling 9. Rock Islands permit 3. Meals 7. Land tours 4. Ground transport 10. Other:.....	17. How many day trips did you make to the Rock Islands or how many days did you stay in the Rock Islands?days																																																															
8. If you are on a package tour, what did you pay in addition to the price of your package? <i>(Please give amounts per person)</i> 1. Meals \$..... 6. Land tours \$..... 11. Other: 2. Transport \$ 7. Rock Islands tour \$..... \$..... 3. Snorkeling \$ 8. Night life \$..... 4. Diving \$..... 9. Rock Islands permit \$..... 5. Kayaking \$..... 10. Shopping/souvenirs \$.....	18. Did you pay the Rock Island Permit (\$15 for two weeks) on this visit? 1. Yes 2. No 3. Don't know/ Didn't know there was a fee																																																															
9. If you did not travel on a package tour, what did you spend in total during this trip and on what items? <i>(Please give amounts per person)</i> 1. Airfare \$..... 7. Hotels / Lodgings \$..... 13. Other: 2. Meals \$..... 8. Land tours \$..... \$..... 3. Transport \$ 9. Rock Islands tour \$..... 4. Snorkeling \$ 10. Night life \$..... 5. Diving \$..... 11. Rock Islands permit \$..... 6. Kayaking \$..... 12. Shopping/souvenirs \$.....	19. Please rate your satisfaction for each of the following items <i>(Circle response: 5 = very satisfied, 1 = Very dissatisfied)</i> <table border="0"> <tr> <td>Hotel Facilities</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Hotel Service</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Hotel Value</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Dive Site Quality</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Snorkeling Site Quality</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Diving/snorkeling Service (Guides)</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Diving Safety</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Diving Facilities (boat, equipment)</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Diving Value</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> </table>	Hotel Facilities	5	4	3	2	1	NA	Hotel Service	5	4	3	2	1	NA	Hotel Value	5	4	3	2	1	NA	Dive Site Quality	5	4	3	2	1	NA	Snorkeling Site Quality	5	4	3	2	1	NA	Diving/snorkeling Service (Guides)	5	4	3	2	1	NA	Diving Safety	5	4	3	2	1	NA	Diving Facilities (boat, equipment)	5	4	3	2	1	NA	Diving Value	5	4	3	2	1	NA
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<p>10. Did the amounts given above include transportation and expenses in other countries? Yes No</p> <p>If no, how much did you spend on these? \$.....</p>	<table> <tr> <td>Land Tours</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Rock Island Tours</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Island Beauty</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> <tr> <td>Overall value</td> <td>5</td> <td>4</td> <td>3</td> <td>2</td> <td>1</td> <td>NA</td> </tr> </table>	Land Tours	5	4	3	2	1	NA	Rock Island Tours	5	4	3	2	1	NA	Island Beauty	5	4	3	2	1	NA	Overall value	5	4	3	2	1	NA
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<p>20. To help fund activities that protect corals, fish, turtles and other reef animals in Palau, visitors to the marine environment in may be asked to pay a conservation fee, in addition to the existing Rock Island Permit. This fee would increase the cost of your visit as operators would add it to your tour price. We would like to know how this would affect your trip.</p> <p>If the price of your trip had been \$10 higher would you still have come to Palau?</p> <p>1. Yes 2. No</p>	<p><i>Lastly, we would like to learn more about the characteristics of people who visit Palau. All responses are confidential and we will not ask your name or anything else to identify you.</i></p>
<p>21. There are a number of ways the conservation fee could be charged. Would you prefer to pay this fee: <i>(Please circle one)</i></p> <p>1. Per visit (valid for up to one month) 2. Per dive / snorkel / activity 3. No specific preference 4. Other 5. Don't know</p>	<p>24. What is your gender/sex? Male Female</p>
<p>22. Which type of organization would you prefer to collect and allocate the funds generated by the conservation fee for marine management in Palau? <i>(Please circle one)</i></p> <p>1. Public sector (States, National government etc) 2. Private sector (Operators, rentals etc) 3. Non-government organizations (Palau Conservation Society, TNC, WWF etc) 4. Public/private/non-government partnerships 5. Local communities. 6. Don't know</p>	<p>25. What is your age? <i>(Please circle appropriate number)</i></p> <p>1. 15 to 19 years old 6. 40 to 44 years old 2. 20 to 24 years 7. 45 to 49 years old 3. 25 to 29 years 8. 50 to 54 years old 4. 30 to 34 years old 9. 55 to 59 years old 5. 35 to 39 years old 10. 60 years and over</p>
<p>23. Currently, several of Palau's 16 States are charging fees to visitors. (e.g. Koror State Rock Island Permit). Other States in Palau are also considering this. Would you prefer a fee per State or one fee for the whole of Palau? <i>(Circle one)</i></p> <p>1. One fee for the whole of Palau 2. Fee per State 3. Fee per Site 4. No preference 5. Other preference:</p>	<p>26. Where do you presently reside?.</p> <p>1. United States 5. FSM 8. Australia 2. Japan 6. Guam 9. New Zealand 3. CNMI 7. Great Britain 10. Germany 4. ROC Taiwan 11. Other</p>
<p>27. What is your highest level of education completed? <i>(Circle one)</i></p> <p>1. Not a high school graduate 2. High school graduate 3. Some college or university 4. Finished college (BA/BS) 5. Advanced degree (MS,PhD)</p> <p>28. What is your pre-tax income per year from all sources? Those answering as individuals should circle the number that shows their individual income. Couples/families should circle the number that shows their combined household income.</p> <p><i>If you know your annual income in US\$, please circle the relevant number from the list:</i></p> <p>1. Less than \$25,000 2. \$25,000 to \$49,999 3. \$50,000 to \$74,999. 4. \$75,000 to \$99,999. 5. \$100,000 to \$119,999 6. \$120,000 to \$139,999 7. \$140,000 and above</p> <p><i>If you do not know your income in US \$, please write the name of the currency and the amount in the following spaces:</i></p> <p>Currency.....Amount.....</p>	

Thank you very much for taking the time to complete this survey.If you have any further comments about Palau or your experience here, please write in the space behind the cover.

We wish you a safe and pleasant journey, and hope you will visit our island again.

Kom Kmal Mesulang



**PALAU VISITOR
SURVEY**

2004

*Office of Planning and Statistics
Bureau of Budget and Planning
Ministry of Finance
Koror, Republic of Palau*