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2016 Survey on the Visitors to Jeju Special Self-Governing Province Summary



제주관광공사
JEJU TOURISM ORGANIZATION

Table of Contents

Chapter 1 Summary of the Survey

Chapter 2 Survey Results on Korean Travelers

Chapter 3 Survey Results on Foreign Travelers

Chapter 4 Survey Results on Cruise Tourists

Chapter 1

Summary of the Survey

- 01. Purpose and History**
- 02. Scope and Items**
- 03. Methods and Process**
- 04. Sampling Design**
- 05. Final Effective Samples**

01 Purpose and History of the Survey

■ Purpose of the Survey

- To identify traveling behaviors and characteristics of visitors and to find areas of improvement in terms of acceptance for such visitors
- To provide statistical and basic data for the better understanding about the outbound tourism markets based on the nationalities and regions
- To provide useful base data for the tourism policy-making by identifying recent trend and the level of satisfaction in and about the tourism markets
- To compare and analyze the trend of yearly changes of the tourism industry for providing base materials of tourism policies

■ History of the Survey

- 2014: Issued by the Jeju Special Self-Governing Province, conducted by the Jeju Tourism Organization, and approved as National Statistics
- 2015: Jeju Special Self-Governing Province conducted a survey on the visitors to Jeju (July~December)
- 2016: Jeju Special Self-Governing Province conducted a survey on the visitors to Jeju and has been expanded as an around-the-year survey.

■ Legal basis of the survey

- Approved as National Statistics under the Statistics Act (Approval Number: 21807)

02 Scope and Items of the Survey

■ Cycle and size of the survey

- Cycle of the survey: 12 months (January-December, Designated as National Statistics on July 2, 2014)
- Size of the survey: Around 1,000 people/month, 12,000 people/year

■ Target of the survey

- Koreans, foreigners, and cruise passengers who have visited Jeju and then left the island (or Korea).
- Those who are over 15 years of age and have stayed more than one day and less than 1 year. (And cruise passengers who stayed for more than 1 hour for sightseeing.)
- Exclude visitors for transfer
- Exclude captains, and crews of ships or air planes, and soldiers.
- Provided if they visit Jeju for sightseeing, such people are included in the survey
- When a respondent accompanies more than 2 people, only one person is included as the target of the survey.
- When the number of visitors' group is more than 10, up to two people become the target of the survey.
But, if the gender or age differs, the survey was conducted separately.
- For group tours, in a single package product, up to four people become the respondents of the survey.

02 Scope and Items of the Survey

■ Target nationalities of the survey

- Japan, China, Hong Kong, Singapore, Taiwan, Thailand, Malaysia, Australia, the U.S., Canada, the U.K., Germany, France, Russia, Middle Eastern countries, India, and others
- The countries are grouped into the following six categories: Japan (Japan), China (China), Greater China (Taiwan, Hong Kong), Southeast Asia (Singapore, Malaysia, Indonesia, Vietnam), the North Americas (U.S.), and Others (other countries)
- For cruise passengers, nationalities are grouped into four categories: Japan (Japan), China (China), the North Americas (the U.S.), and Others (other countries).

■ Survey period

The 10th~20th day of every month (more than four business days, and three weekend days)

■ Location for the survey

- Jeju International Airport (domestic and international terminal) Jeju Ferry Passenger Terminal (Yeonan Pier, the 6th Pier), Jeju Cruise Pier

02 Scope and Items of the Survey

■ Items of the survey

- **Behavior of tourists:** Visiting frequency to Jeju over the past three years, length of stay, purpose of the tour, alternative options other than Jeju (other countries or Korean cities) when the tourist select Jeju as a destination, reasons why the tourist selected Jeju, tour informational channels, online channels to get tour information
- **Patterns of tours in Jeju:** Type and number of companions, type of travel, accommodations, main transportation, selected attractions in Jeju, attractions wanting to re-visit, activities done in Jeju, memorable activities, items that the respondent bought, shopping places, frequency of shopping(for package product users), travel budget
 - Additionally, surveyed items in 2016: the number of companions under the age of 15
 - Complemented options for 2016
 - Options for information collecting sources: "Organizations within Jeju such as the provincial government, Jeju Tourism Organization, and Jeju Tourism Association" were added.
 - Options of accommodations: "I didn't stay" was added. The "Hotel" and "Tourist Hotel" were consolidated as "Hotel".
 - Options for Transportation Methods: Modified to "chartered taxi (or a vehicle run with a tour guide)"
 - Options on attractions: "Seogwipo Mael Olle Market" was added.
- **Evaluation on your tour in Jeju:** The tour was uncomfortable, I was satisfied, other evaluations on the tour in Jeju
- **General data:** The region of you stay, gender, academic background, the year of birth, average yearly income of your household, and job

03 Methods and Process of the Survey

■ Survey method

- Respondents of the survey need to fill out the survey questionnaires by themselves.

■ Tools for data collection

- The survey questionnaires were made in 7 different languages (Korean, English, Japanese, simplified or traditional Chinese, Indonesian, and Vietnamese). The respondent selects one of them based on his/her nationality and language.

■ Process of the survey

- Selecting interviewers (those who can communicate in a foreign language, and have previously worked as an interviewer for other surveys were preferred)
- Training of interviewers (to minimize non-sampling errors, the interviewers are trained before the start of the survey.)
- On-site survey (On the target place of the survey, interviewers explain the purpose of the survey to the respondents and then proceed.)
- Supervision and management (All survey activities are led by the researchers and audited on the site of the survey.)

04 Sampling Design

■ Definition of the population

- In 2016, the target population of the survey was Korean and foreign tourists who visited Jeju and conducted tour activities in 2016.

■ Size of the samples

- 6,000 Korean tourists / year (sampling error ± 1.27 percentage points, confidence level of 95%)
- 4,000 foreign tourists / year (sampling error ± 1.55 percentage points, confidence level of 95%)
- 2,000 cruise tourists / year (sampling error ± 2.19 percentage points, confidence level of 95%)

04 Sampling Design

■ Sample allocation among Koreans

Residence	Population (people)	Minimum no. of sample (people)	Square root proportion allocation (People)	Final allocation (people)
Seoul	2,806,354	120	936	936
Busan	804,882	120	501	501
Daegu	418,538	120	361	361
Incheon	440,002	120	371	371
Gwangju	466,831	120	382	382
Daejeon	397,075	120	352	352
Ulsan	252,196	120	281	281
Gyeonggi	2,264,400	120	841	841
Gangwon	343,416	120	327	327
Chungcheong	622,442	120	441	441
Jeolla	885,370	120	526	526
Gyeongsang	976,589	120	552	552
Others (Overseas)	53,659	120	129	129
Grand total	10,731,754	1,560	6,000	6,000

04 Sampling Design

■ Sample allocation among foreigners

Nationalities	2014 Foreigners visiting Jeju(%)	2015 Foreigners visiting Jeju(%)	No. of tourists by nationalities (approx.)	
			No. of tourists (people)	Share (%)
Japan	2.90	2.50	76,790	2.70
China	85.90	86.15	2,445,206	86.03
Hong Kong	0.85	0.83	23,875	0.84
Taiwan	0.97	0.62	22,483	0.79
Singapore	1.39	0.81	31,290	1.10
Malaysia	1.92	1.15	43,711	1.54
Indonesia	1.11	0.78	26,799	0.94
Vietnam	0.96	1.03	28,329	1.00
Thailand	0.97	1.55	35,786	1.26
The U.S.	0.60	0.67	17,940	0.63
Others	2.43	3.91	90,220	3.17
Grand total	100	100	2,842,429	100

04 Sampling Design

■ Sample allocation among cruise tourists

Nationalities	Population (people)	Minimum no. of sample (people)	Square root proportion allocation (People)	Final allocation (people)
Japan	15,876	120	234	234
China	596,590	120	1,437	1,437
Others	31,290	120	329	329
Grand total	643,756	360	2,000	2,000

05 Final Effective Samples

Final Effective Samples

Classification		Breakdown of Samples	Secured Effective Samples	Gap with goal no.	Achievement
Koreans	Koreans	6,000	6,003	3	100.1%
Foreigners	Japan	318	315	- 3	99.1%
	China	1,794	1,933	139	107.7%
	Hong Kong	177	167	- 10	94.4%
	Taiwan	172	182	10	105.8%
	Singapore	203	201	- 2	99.0%
	Malaysia	240	253	13	105.4%
	Indonesia	188	178	- 10	94.7%
	Vietnam	193	146	- 47	75.6%
	Thailand	217	176	- 41	81.1%
	The U.S.	154	138	- 16	89.6%
	Others	344	363	19	105.5%
	Total	4,000	4,052	52	101.3%
Cruise	China	1,437	1,656	219	115.3%
	Japan	234	269	35	115.0%
	Others	329	81	- 248	24.6%
	Total	2,000	2,006	6	100.4%
Grand Total		12,000	12,061	61	100.5%

Chapter 2

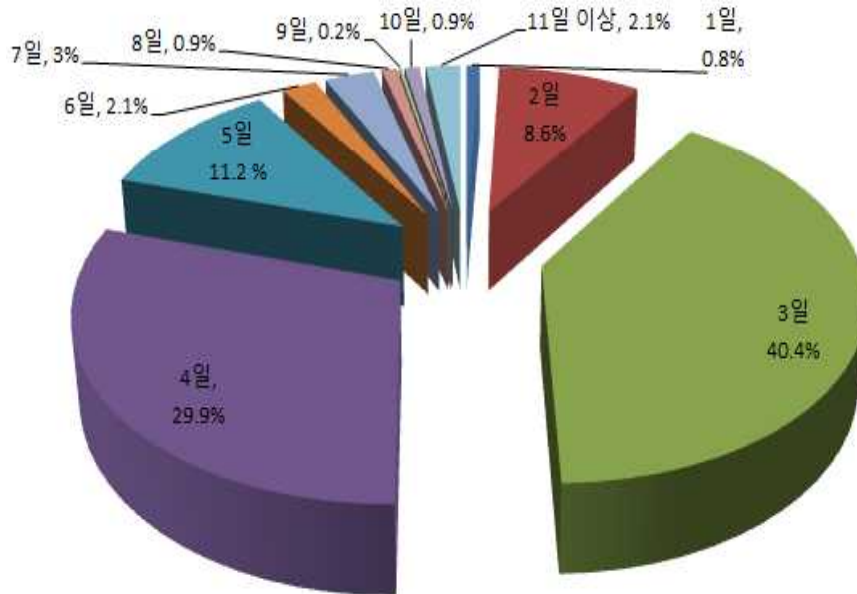
Survey Results of Korean Travelers

01. Data on the travels in Jeju
02. Data on the tourists' spending in Jeju
03. Data on the tourists' spending in Jeju

01 Data on the travels in Jeju

■ Duration of stay

- The average duration for Jeju tours was 4.12 days.



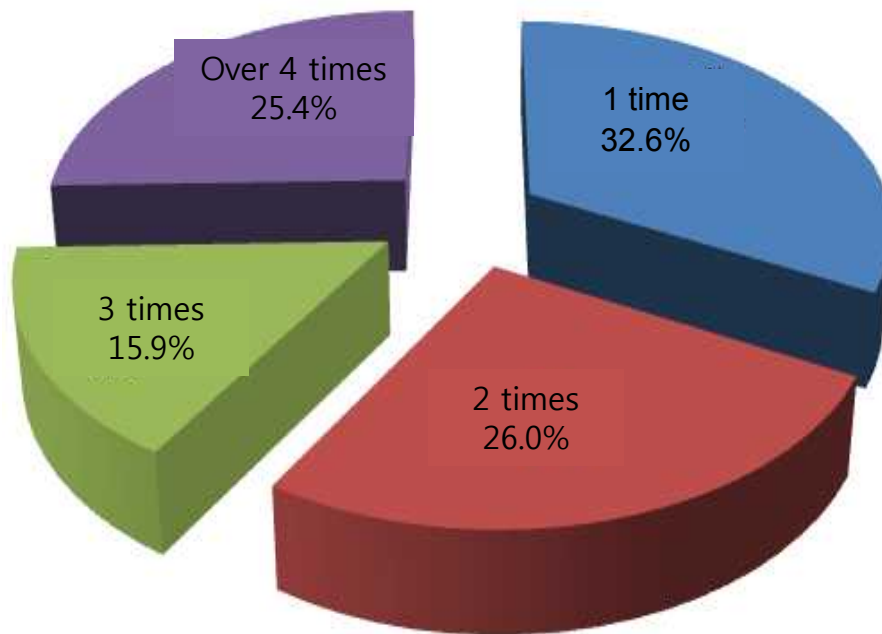
Classification	2014	2015	2016
Average duration of stay	5.06 days	5.08 days	4.12 days
Under 2 days	9.6	10.3	9.4
3 days	35.7	36.1	40.4
4 days	27.7	31.3	29.9
5 days	12.2	10.8	11.2
Over 6 days	14.6	11.5	9.2

※ The total duration of stay over 365 days was included.

01 Data on the travels in Jeju

■ Frequency of visit to Jeju (for the past 3 years)

- One time visits accounted for 32.6%, the highest portion of visiting frequency to Jeju

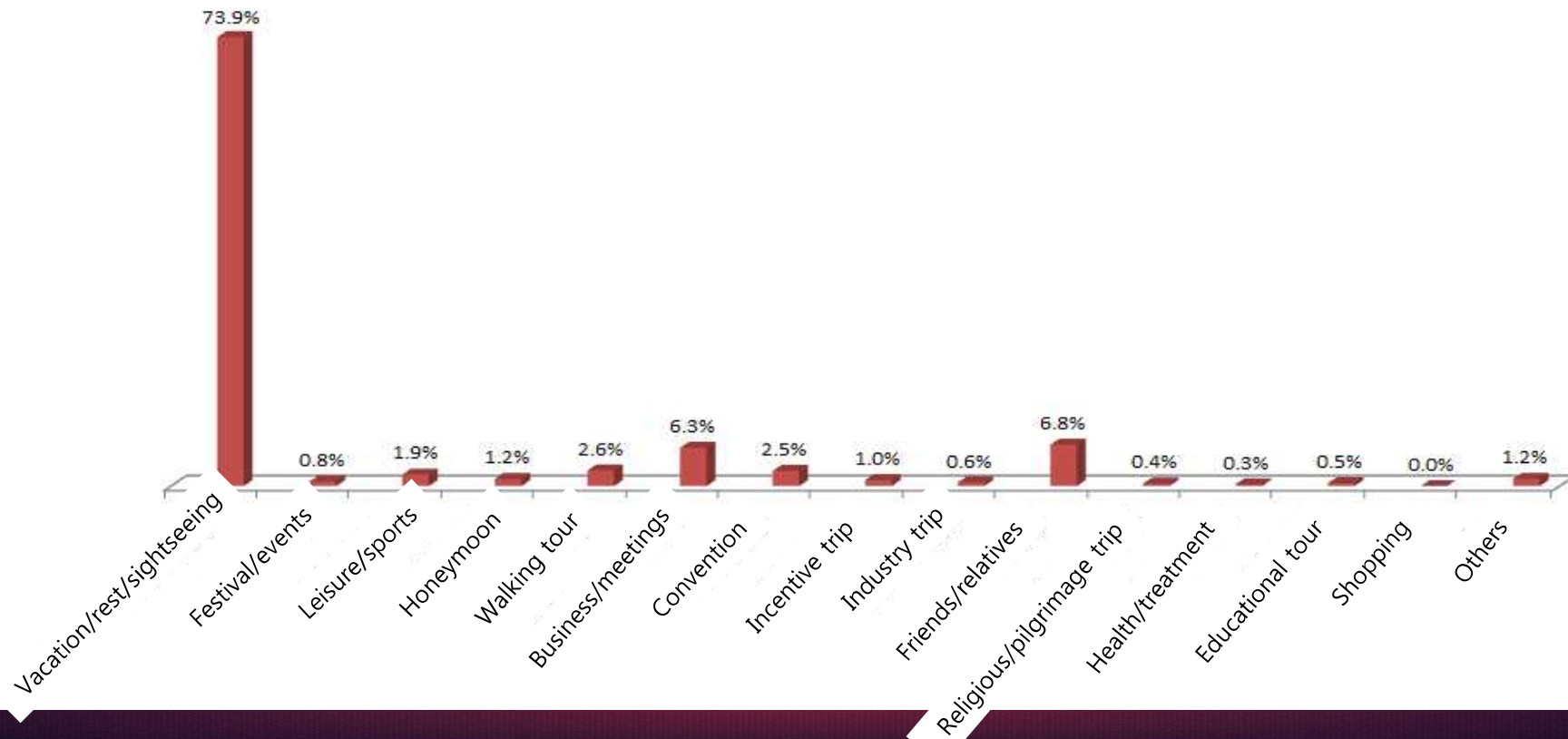


Classification	2014	2015	2016
First visit	28.6	36.3	32.6
Visit twice	26.2	27.2	26.0
Visit three times	16.4	14.5	15.9
Visit more than four times	28.5	22.0	25.4

01 Data on the travels in Jeju

■ Purpose of visits

- The largest number of people (73.9% of the total respondents) answered that they visit Jeju for vacation, get some rest, and visit attractions.



01 Data on the travels in Jeju

■ Purpose of visits

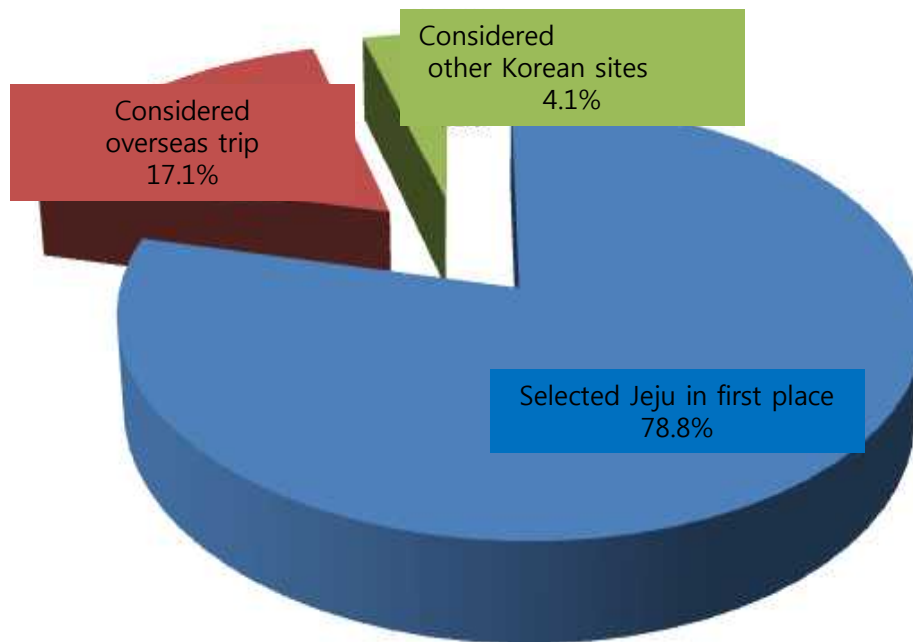
- Each year, more people visit Jeju for vacation, rest, and sightseeing.

Classification	2014	2015	2016
Vacation, rest, and sightseeing	65.5	68.4	73.9
Festival, and events	0.8	0.4	0.8
Leisure, and sports	5.2	2.8	1.9
Honeymoon tour	1.2	1.3	1.2
Walking tour (Olle trail, etc)	3.2	2.3	2.6
Business trip, or attending meetings	9.9	7.0	6.3
Convention, or academic event	3.0	3.2	2.5
Incentive trip from workplace	1.3	1.3	1.0
Field trip on the industry	0.8	0.6	0.6
Visit friends or relatives	5.2	6.5	6.8
Religious, or pilgrimage trip	0.5	0.4	0.4
Health, and treatment	0.2	0.2	0.3
Educational tour (school excursion, etc.)	0.5	3.2	0.5
Shopping	0.0	0.1	0.0
Others	2.7	2.4	1.2

01 Data on the travels in Jeju

Destinations considered for tours

- The largest number of people (78.8% of the total respondents) selected Jeju as their destination in first place.

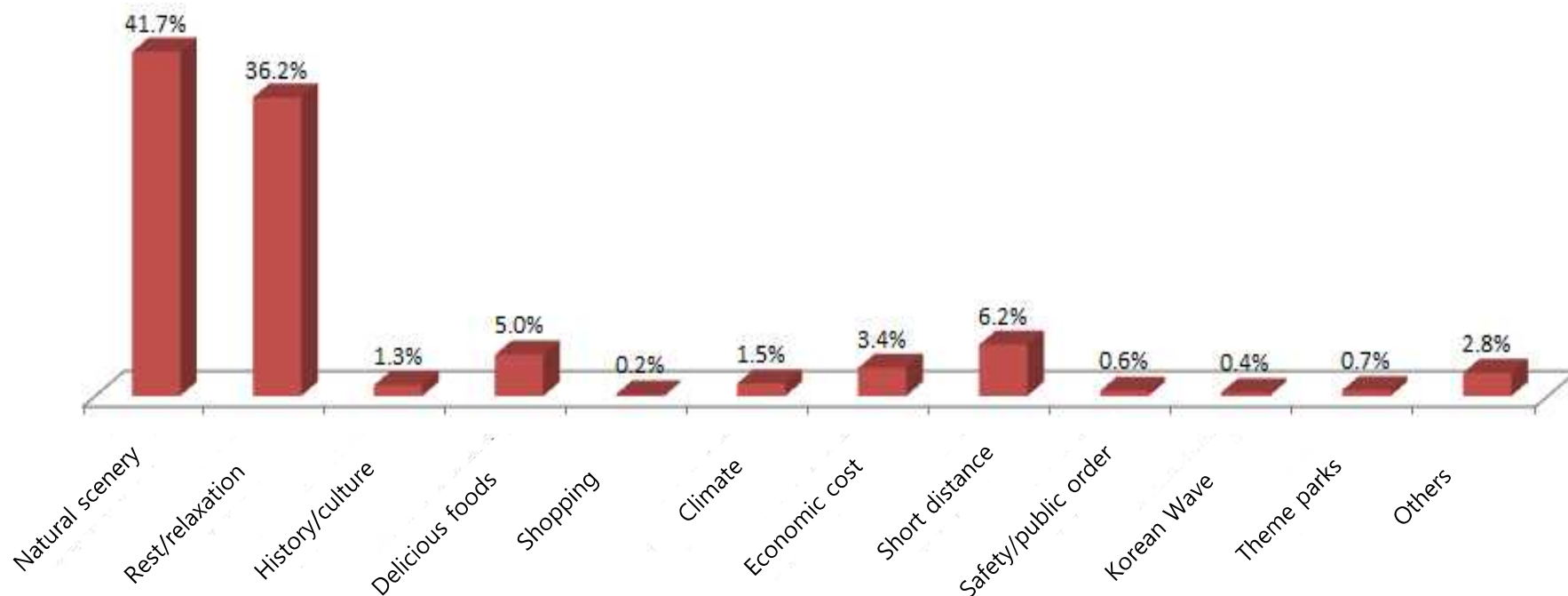


Classification	2014	2015	2016
Selected Jeju in first place	78.9	80.8	78.8
Once considered overseas trip	16.6	14.3	17.1
Once considered other Korean sites	4.6	4.9	4.1

01 Data on the travels in Jeju

Reasons why tourists selected Jeju

- The largest number of people (41.7% of the total respondents) selected Jeju to enjoy natural scenery.



01 Data on the travels in Jeju

Reasons why tourists selected Jeju

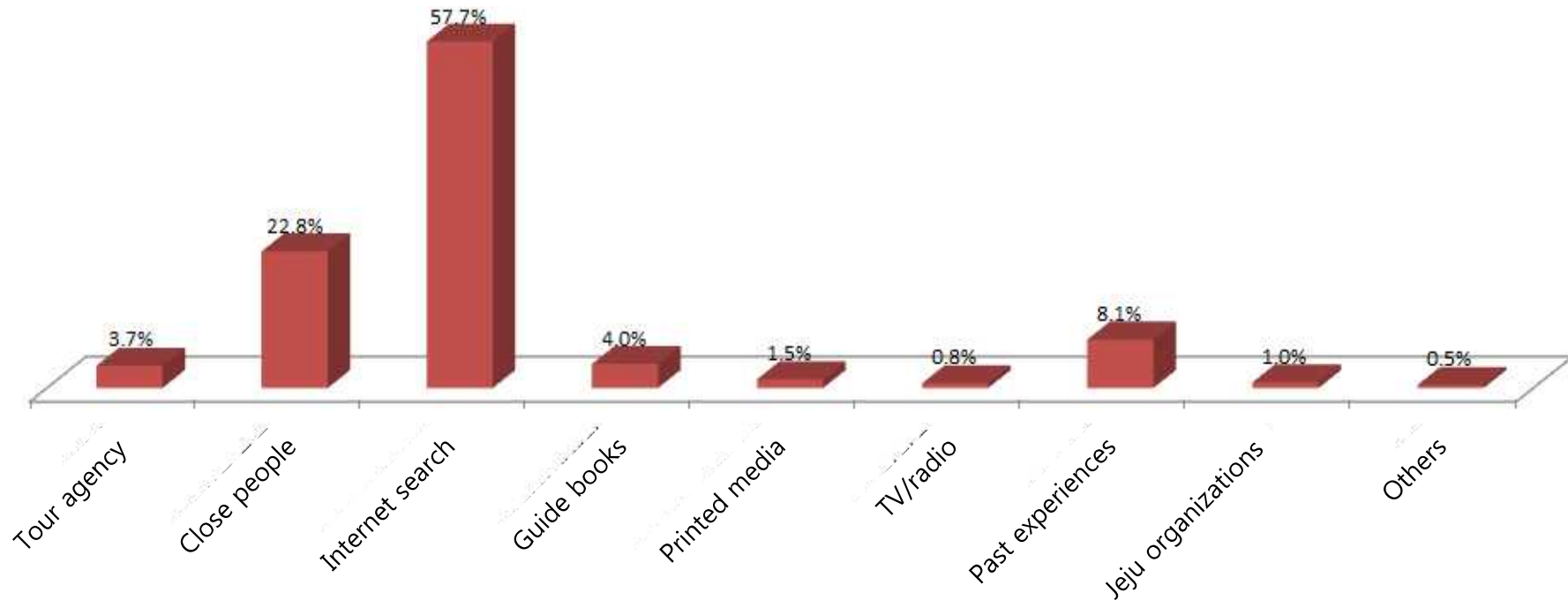
- Each year, more people visit Jeju for their rest and relaxation.

Classification	2014	2015	2016
Natural scenery	47.9	39.4	41.7
Rest, and relaxation	34.1	35.1	36.2
Historic and cultural experience	1.1	1.7	1.3
Culinary and gourmet tour	3.0	4.4	5.0
Shopping	0.2	0.4	0.2
Climate and four seasons	1.3	1.8	1.5
Travel cost	3.2	4.3	3.4
Short distance	4.2	5.6	6.2
Safety and public order	0.8	0.8	0.6
Korean Wave attractions	0.4	0.6	0.4
Theme parks	0.8	1.3	0.7
Others	2.6	4.6	2.8

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

- The largest number of people (57.7% of the total respondents) collected their tour information by online search.



※ Options of "Organizations within Jeju such as provincial government, Jeju Tourism Organization, and Jeju Tourism Association" were added for the 2016 survey.

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

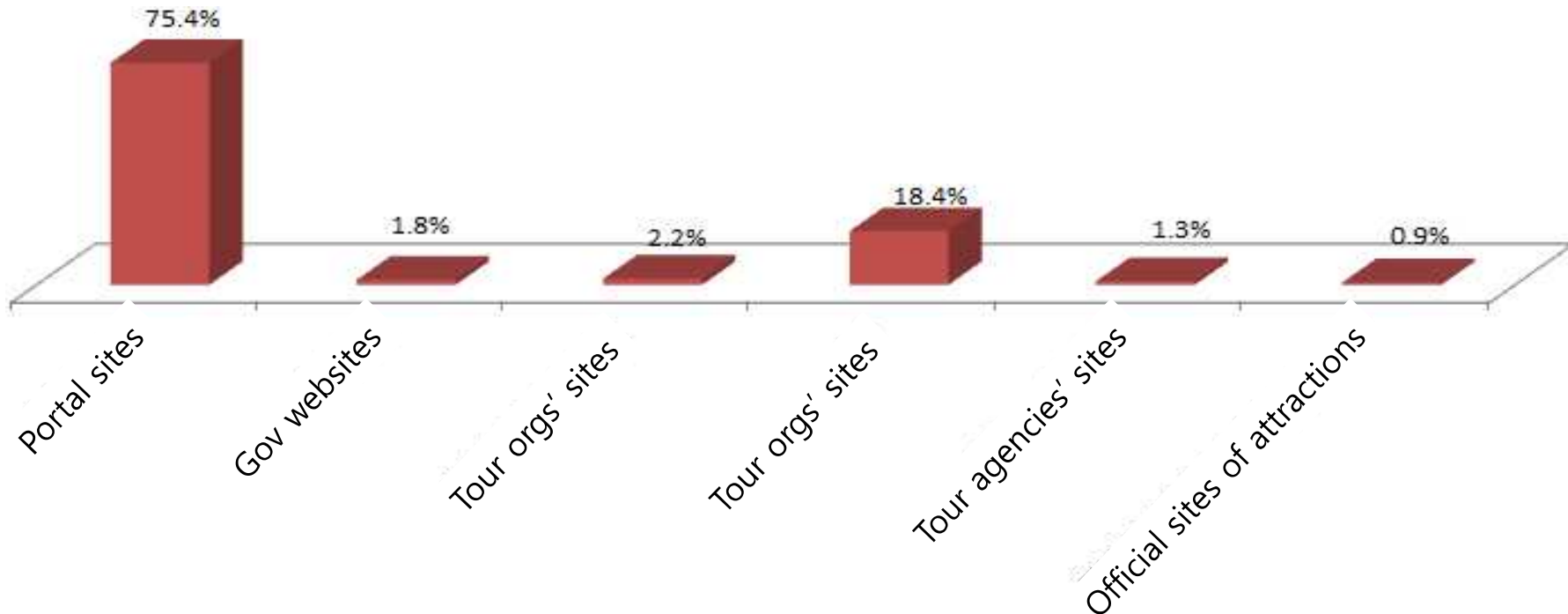
- Though there have been no spikes in any options for the last three years, in 2016, the online search got 4.1% higher answer compared with 2015.

Classification	2014	2015	2016
1	Internet search (58.1)	Internet search (53.6)	Internet search (57.7)
2	Relatives, friends, or colleagues (22.0)	Relatives, friends, or colleagues (23.2)	Relatives, friends, or colleagues (22.8)
3	Past experiences (8.4)	Past experiences (9.1)	Past experiences (8.1)
4	Tour agency (4.7)	Tour agency (5.7)	Tour guide books (4.0)
5	Tour guide books (3.8)	Tour guide books (4.7)	Tour agency (3.7)

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

-The largest number of people (75.4% of the total respondents) selected portal sites as their main source of online information collection.



01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

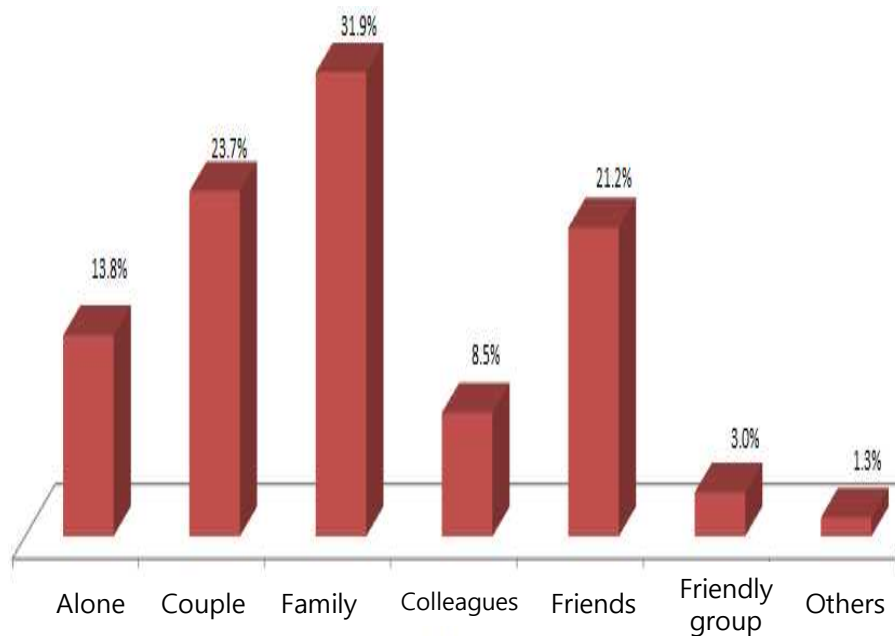
- Though there have been no spikes in any options for the last three years, in 2016, respondents used SNS slightly less than 2015.

Classification	2014	2015	2016
Search at portal sites (Google, etc.)	80.4	74.8	75.4
Sites of government (Ministry or provincial government)	2.3	1.5	1.8
Tourism related organizations' sites (JTO, or Jeju tourism associations)	3.1	1.6	2.2
SNS channels (Facebook, etc.)	11.3	20.1	18.4
Tour agencies' sites	1.7	0.3	1.3
Official websites of attractions or facilities	1.3	1.2	0.9

01 Data on the travels in Jeju

■ Type of companions

- Family members or relatives (31.9%) were the most preferred companions for tours.



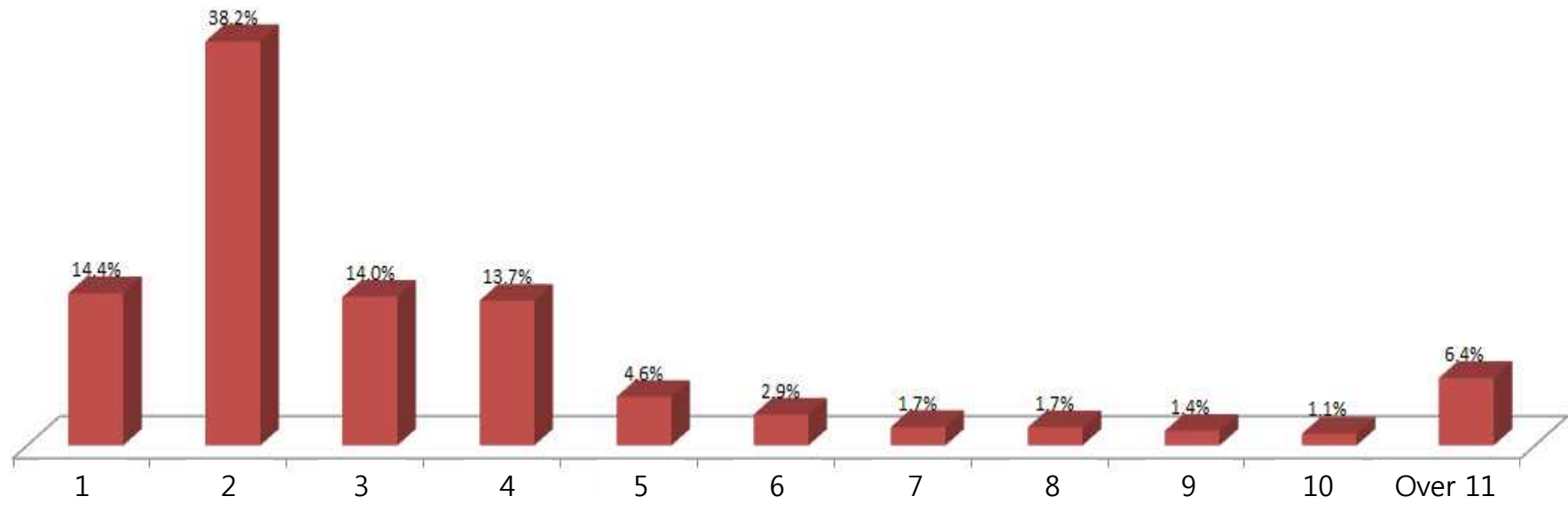
Classification	2014	2015	2016
Alone	16.2	19.1	13.8
Married couple, or lovers	20.7	16.7	23.7
Family members, or relatives	29.2	22.4	31.9
Colleagues	12.2	9.9	8.5
Friends	16.8	26.0	21.2
Members of friendly communities	3.3	3.4	3.0
Others	1.7	2.5	1.3

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

01 Data on the travels in Jeju

■ Number of companions

- The average number of companions was 4.10.



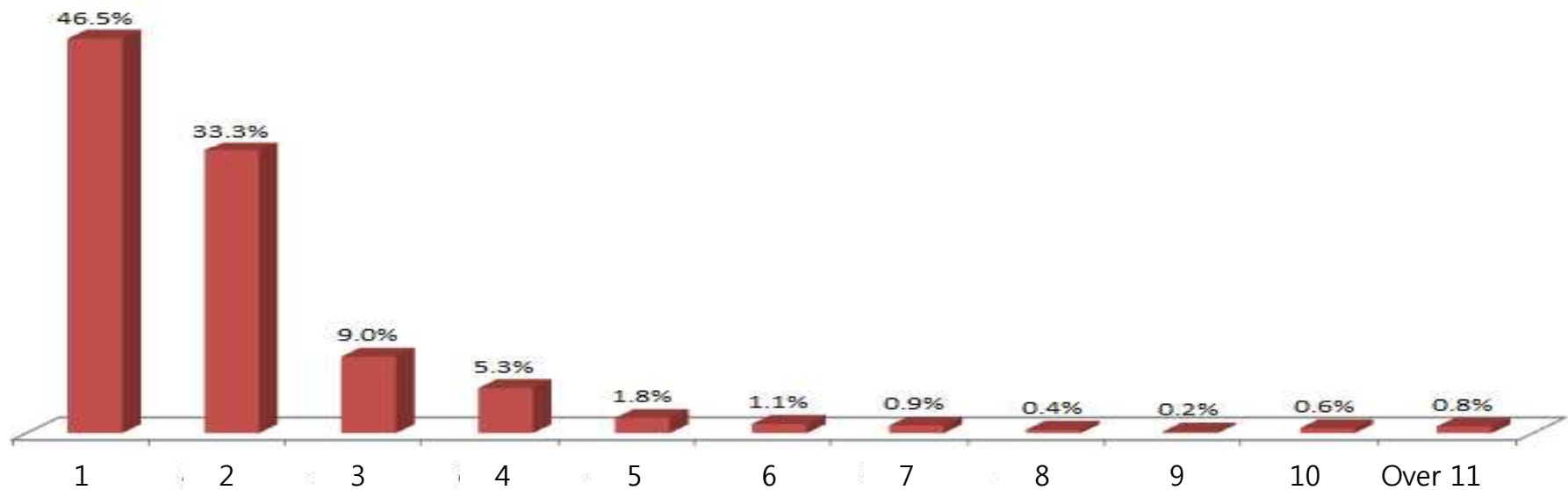
Classification	2014	2015	2016
Average number of companions	4.76	4.07	4.10

※ Cases of tourists who accompany with more than 100 people were excluded in the average analysis and included in the options of "companions of over 11 people".

01 Data on the travels in Jeju

■ Number of companions under 15 years of age

- The average number of companions aged under 15 was 2.43.

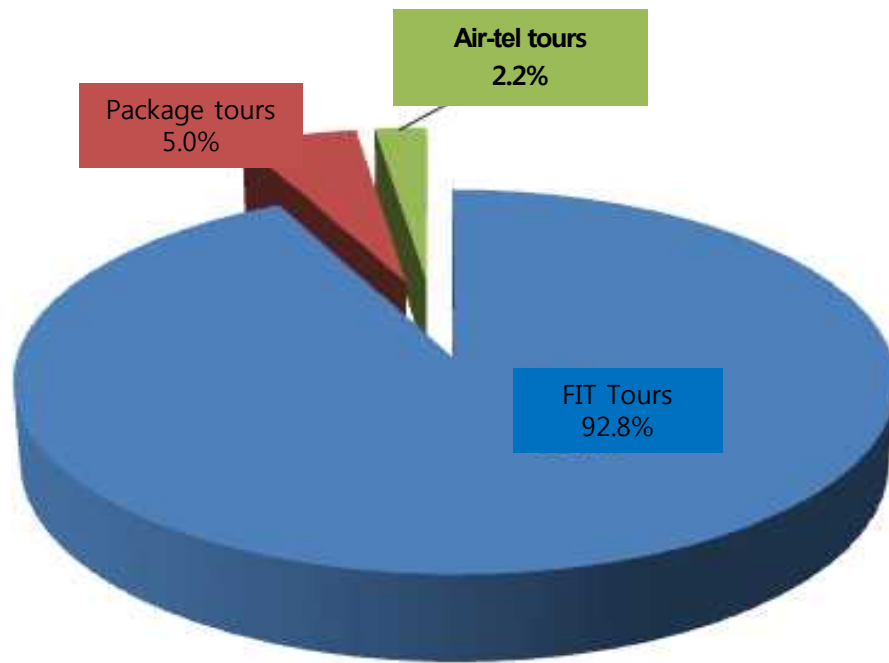


※ This option was newly added from 2016 survey.

01 Data on the travels in Jeju

■ Type of tours

-In the 2016 survey, the largest number of people (92.8% of the total respondents) traveled to Jeju as an individual traveler.

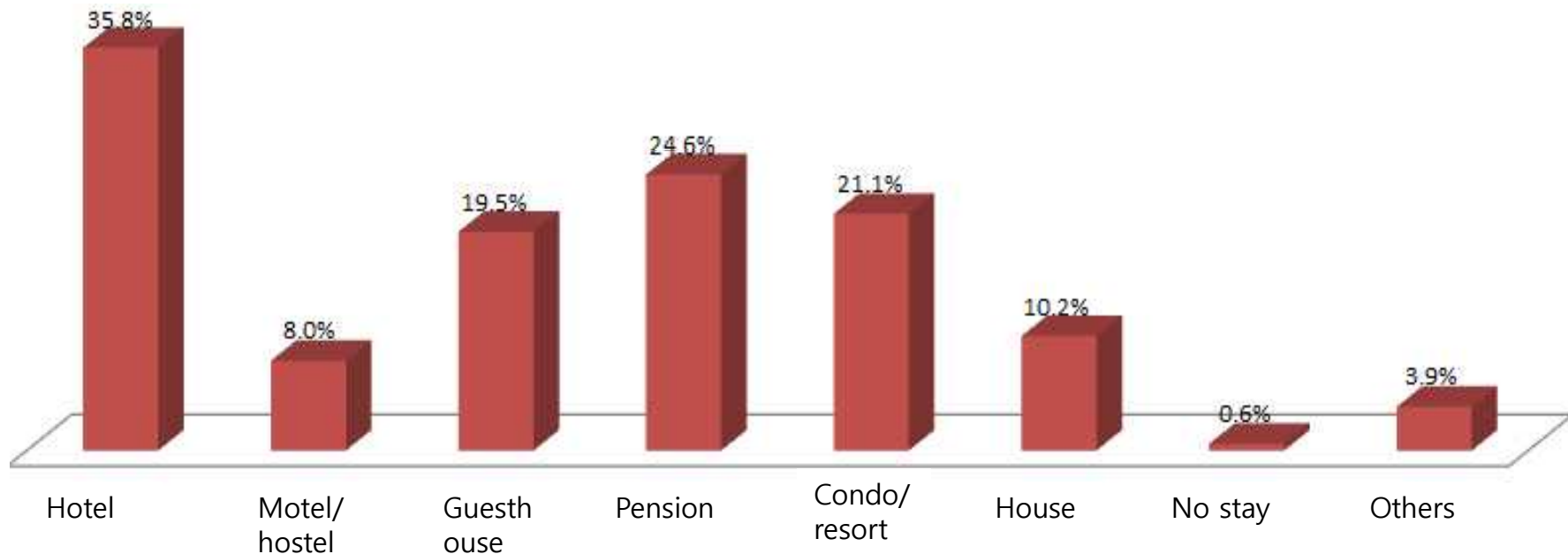


Classification	2014	2015	2016
F.I.T. (Free independent tour)	93.5	89.0	92.8
Packaged tour	4.1	8.7	5.0
Air-tel tour	2.3	2.3	2.2

01 Data on the travels in Jeju

■ Type of accommodation

- The largest number of people (35.8% of the total respondents) stayed in hotels.



※ In 2016 survey, "I didn't stay" was added as the option. Also "Hotel" and "Tourist Hotel" were consolidated as "Hotel".

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents was used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

01 Data on the travels in Jeju

■ Type of accommodation

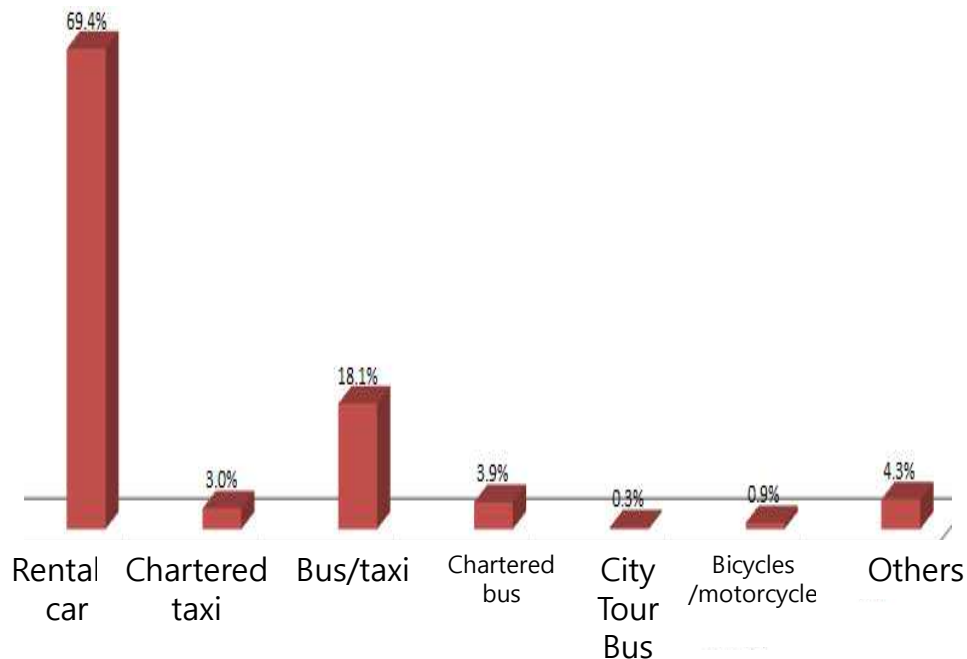
- In 2016, the percentage of hotel and pension use rose from the data of 2015.

Classification	2014	2015	2016
Tourist hotel	3.5	7.9	35.8
Hotel	17.6	18.7	
Motel or hostel	8.5	7.0	8.0
Guest house	14.6	20.8	19.5
Pension	22.3	17.8	24.6
Condominium or resort	19.1	14.5	21.1
House of relatives or friends	9.7	8.3	10.2
I didn't stay.	—	—	0.6
Others	4.8	4.9	3.9

01 Data on the travels in Jeju

■ Main transportation

- The largest number of people (69.4% of the total respondents) selected a rental car as their main transportation.



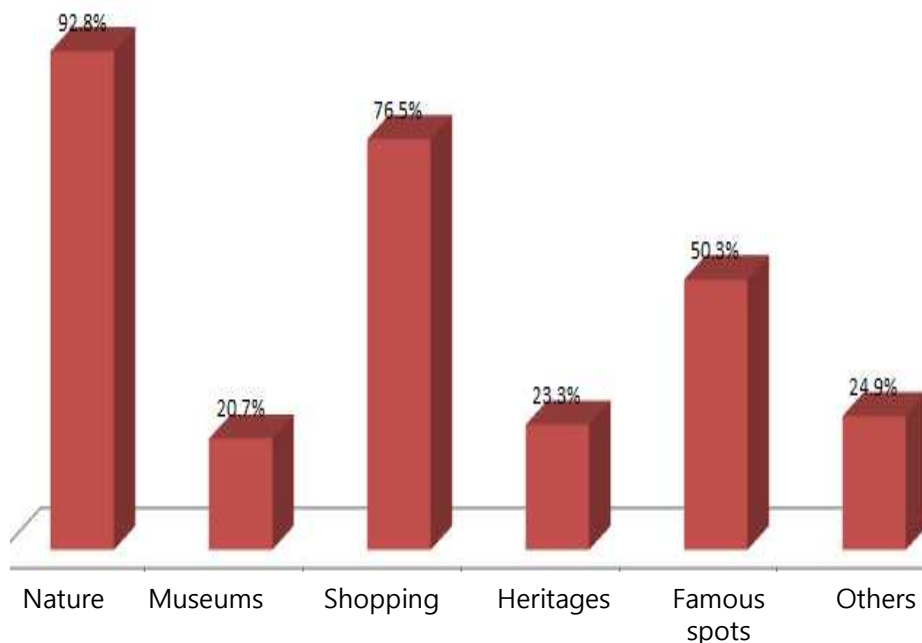
Classification	2014	2015	2016
Rental car	62.6	58.6	69.4
Chartered taxi (or a vehicle run with a tour guide)	3.1	3.3	3.0
Public transportation (bus or taxi)	19.4	25.0	18.1
Chartered bus	3.3	6.3	3.9
City Tour Bus	0.4	0.7	0.3
Bicycles or motorcycle	2.4	2.3	0.9
Others	8.8	3.8	4.3

※ In 2015 survey, there was an option of "a rental car with a tour guide, or a chartered taxi". In 2016 survey, the option became "chartered taxi (or a vehicle run with a tour guide)".

01 Data on the travels in Jeju

■ Main destinations of tours in Jeju

- The largest number of people (92.8% of the total respondents) selected natural sceneries as their main destinations during their tour in Jeju.



Classification	2014	2015	2016
Natural sceneries	50.2	48.7	92.8
Museums	4.9	5.0	20.7
Shopping	16.0	17.7	76.5
Cultural heritages	5.4	5.0	23.3
Other famous locations	23.5	23.7	50.3
Others	—	—	24.9

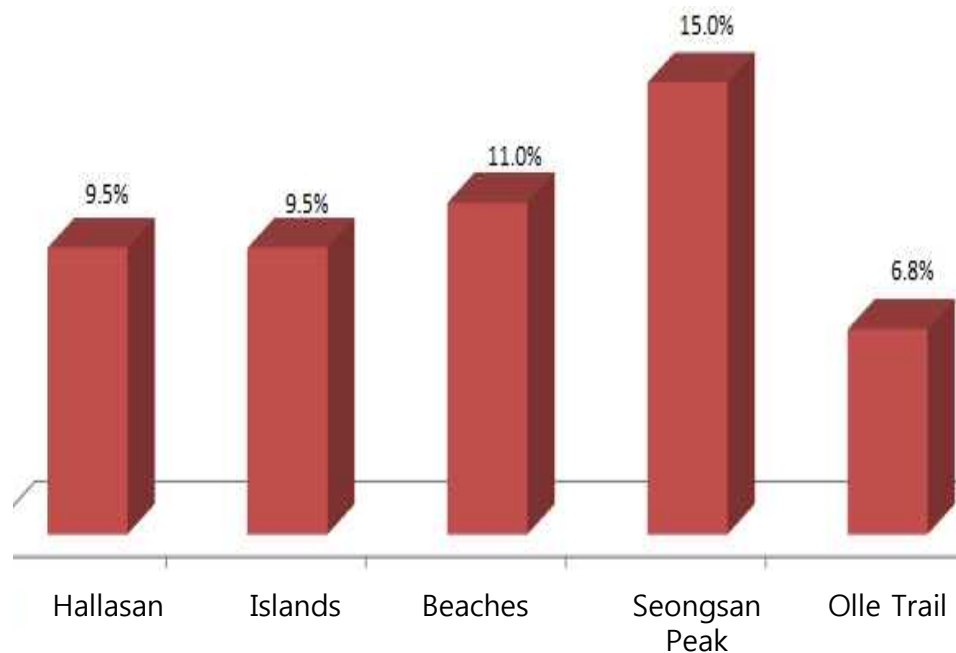
※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should to pay closer attention to such differences.

※ In the 2016 survey, "Seogwipo Mael Olle Market" was added as the option for Shopping.

01 Data on the travels in Jeju

Destinations tourists want to re-visit during their tour in Jeju

- Beaches got the highest answers (15.0% of the total feedbacks) as the destination tourists want to re-visit.

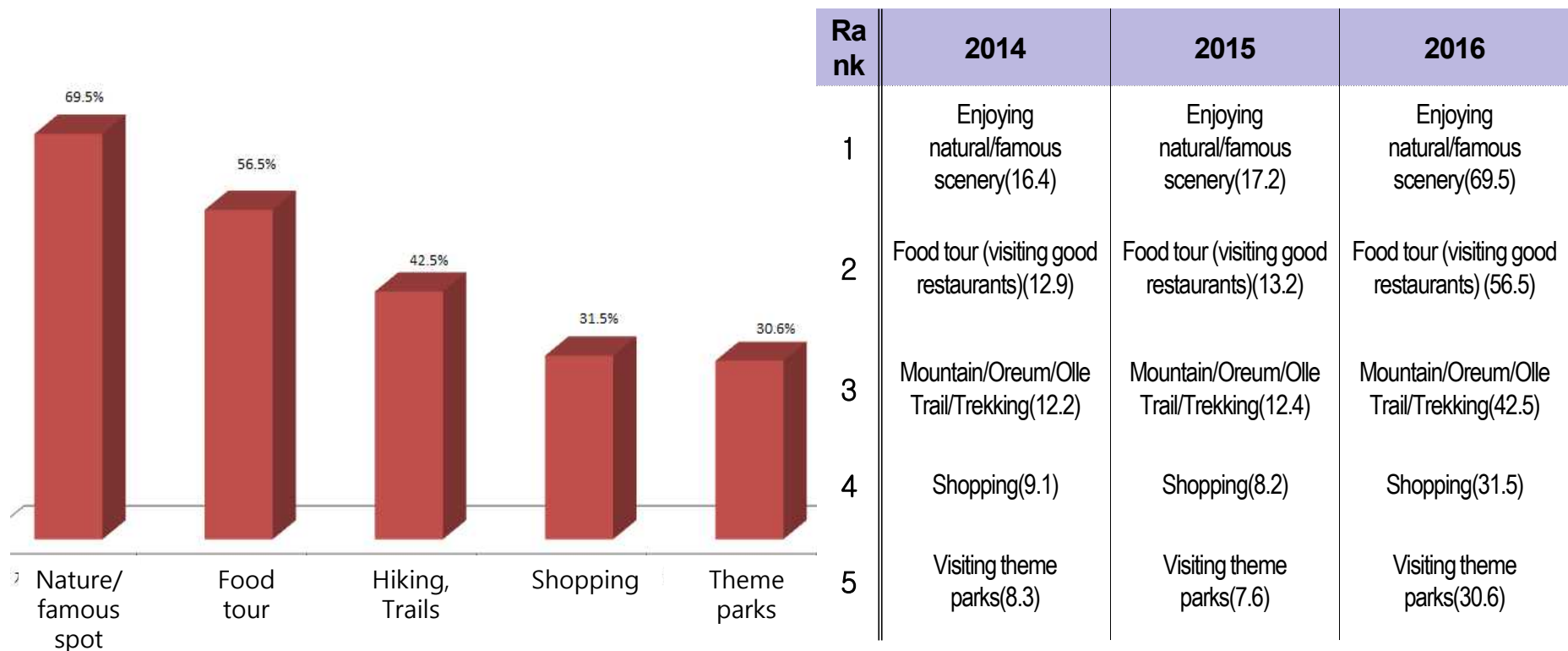


Rank	2014	2015	2016
1	Hallasan(13.4)	Islands(11.2)	Beaches(15.0)
2	Islands(10.6)	Beaches(10.4)	Islands(11.0)
3	Seongsan Ilchulbong Peak(9.7)	Seongsan Ilchulbong Peak(8.4)	Seongsan Ilchulbong Peak(9.5)
4	Beaches(8.2)	Hallasan(8.3)	Hallasan(9.5)
5	Olle Trail(8.2)	Olle Trail(6.3)	Olle Trail(6.8)

01 Data on the travels in Jeju

■ Activities during Jeju tour

- The largest number of people (69.5% of the total respondents) answered that they enjoy natural and famous scenery during their tour in Jeju.

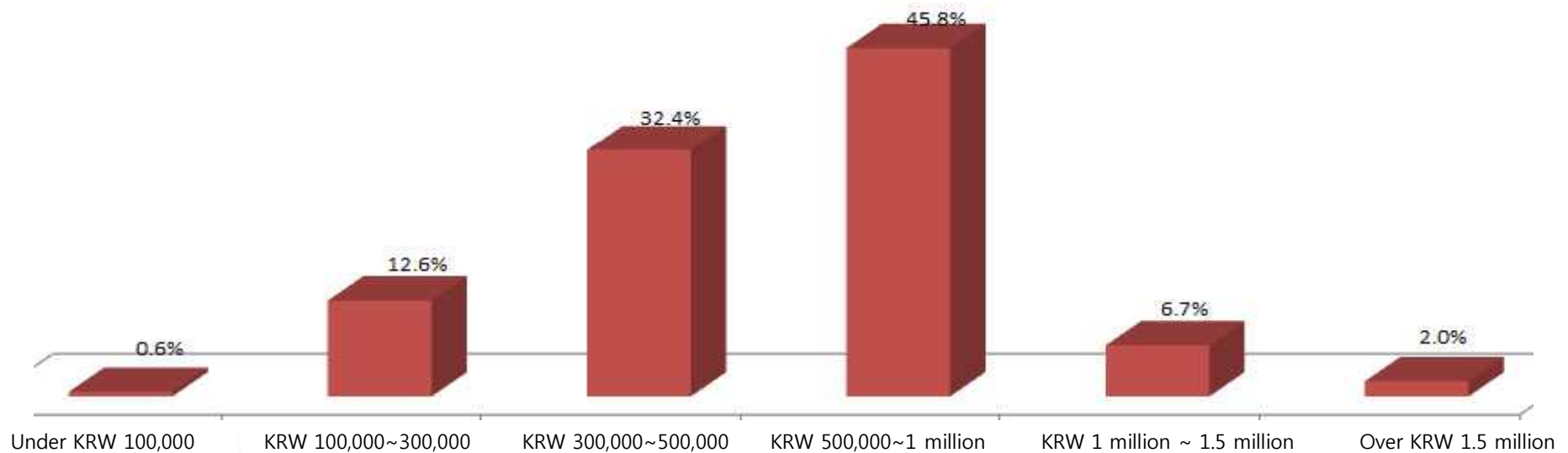


※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should to pay closer attention to such differences.

02 Data on the tourists' spending in Jeju

■ Per capita spending by Koreans

- Korean tourists' average per capita spending was 592,461 Korean won.



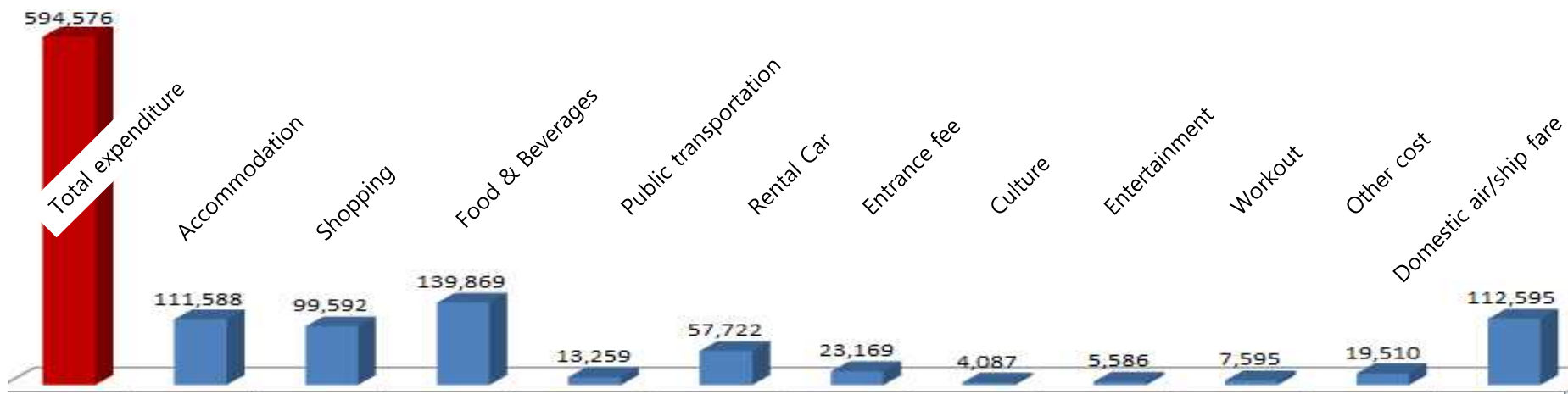
Classification	2014	2015	2016
Average	652,521	572,285	592,461

Chapter 2 Survey Results of Korean Travelers

02 Data on the tourists' spending in Jeju

■ Per capita spending of F.I.T. tourist

- F.I.T. tourists' average per capita spending was 594,576 Korean won.



Classification	2014	2015	2016
Average	666,996	571,866	594,576

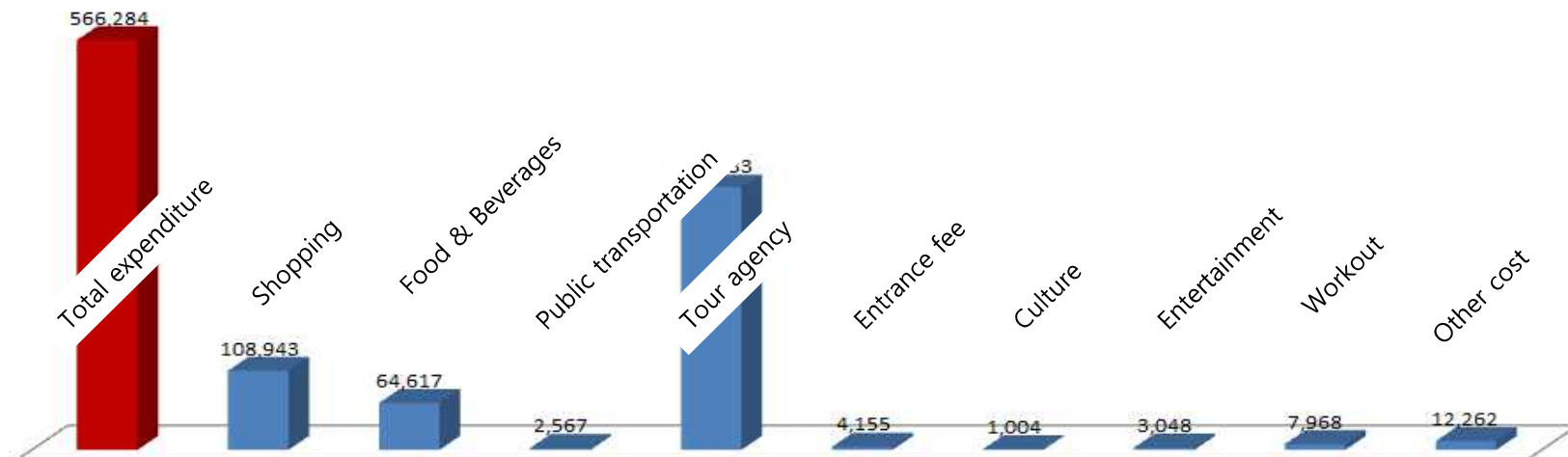
※ The spending of F.I.T. Tourists includes domestic flight fare, ferry fare, and all other required costs.

Chapter 2 Survey Results of Korean Travelers

02 Data on the tourists' spending in Jeju

■ Per capita spending of package tourist

- Package tourists' average per capita spending was 566,284 Korean won.



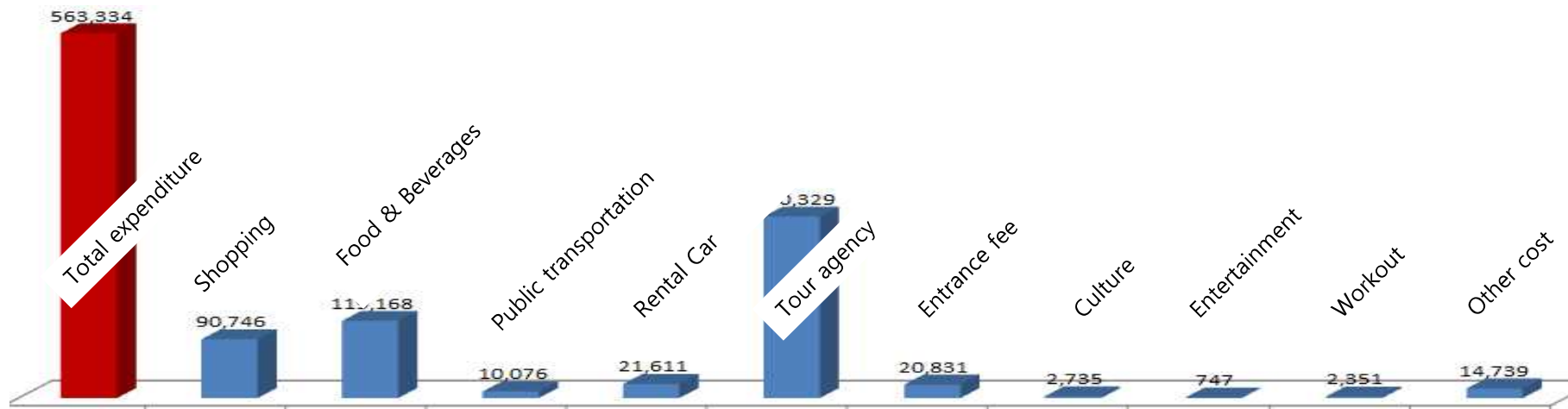
Classification	2014	2015	2016
Average	623,174	508,081	566,284

※ Spending of package tourists include the amount paid to the tour agencies and all other costs.

02 Data on the tourists' spending in Jeju

■ Per capita spending of Air-tel tourist

- Air-tel tourists' average per capita spending was 563,334 Korean won.



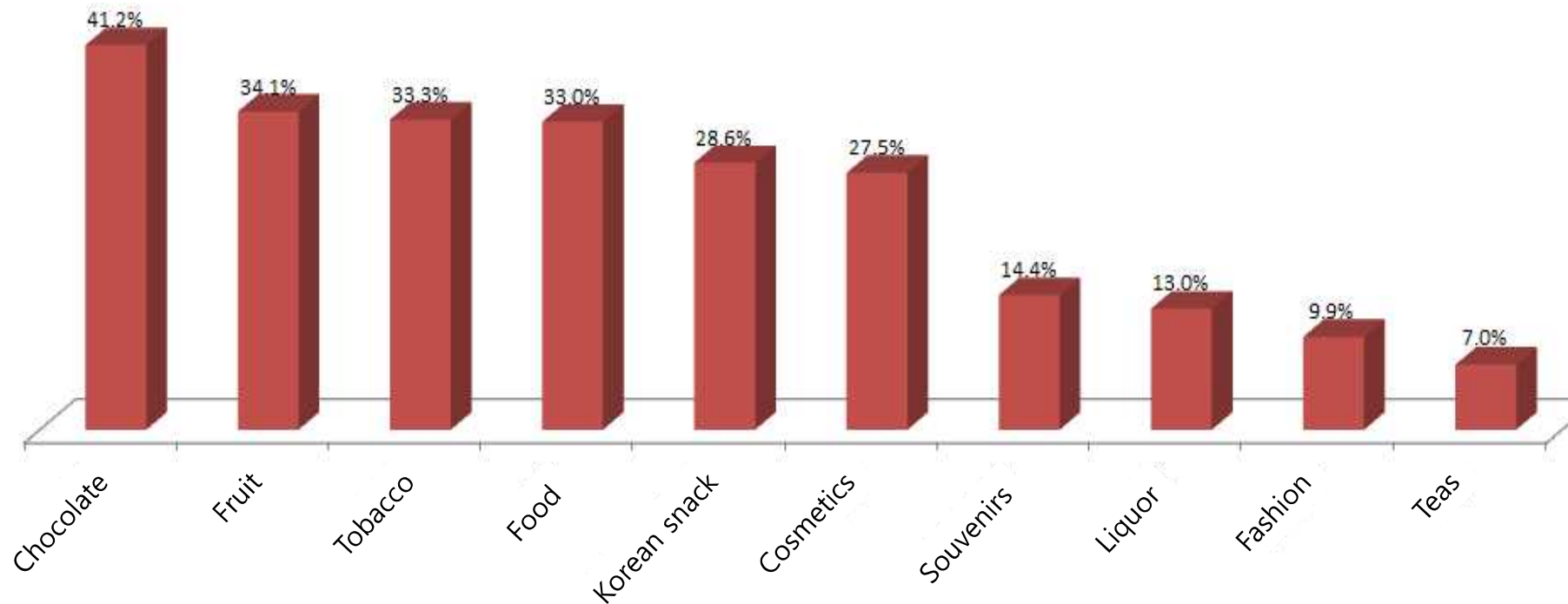
Classification	2014	2015	2016
Average	687,462	725,401	563,334

※ Spending of Air-tel tourists includes the amount paid to the tour agencies and all other costs.

02 Data on the tourists' spending in Jeju

■ Main shopping items

- The largest number of people (41.2% of the total respondents) selected chocolates as their main shopping item.



02 Data on the tourists' spending in Jeju

■ Main shopping items

- For the last three years, chocolate has been the most preferred shopping item. In 2016, the percentage of tobacco as a preferred shopping item rose slightly from 2015.

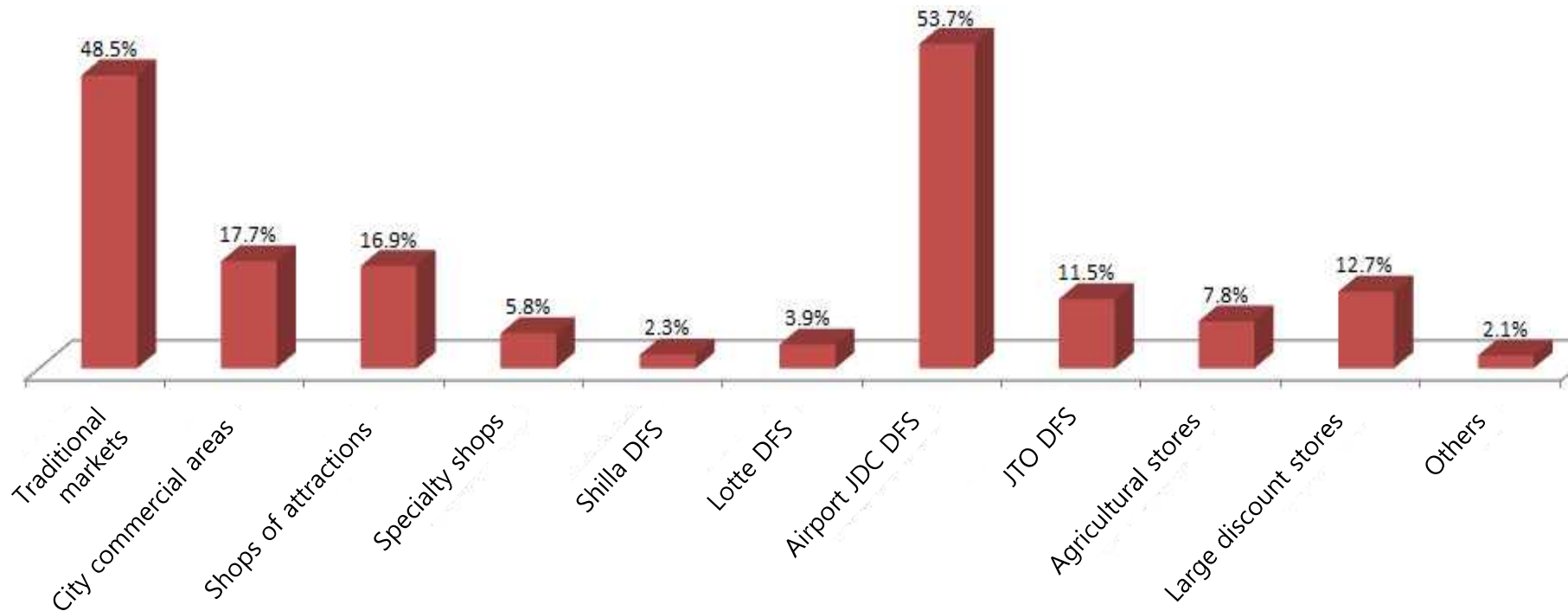
Rank	2014	2015	2016
1	Chocolate (18.5)	Chocolate (16.2)	Chocolate (41.2)
2	Fruit (16.7)	Foods (14.0)	Fruit (43.1)
3	Foods (12.3)	Fruit (11.6)	Tobacco (33.3)
4	Cosmetics (11.6)	Tobacco (11.3)	Foods (33.0)
5	Cookies or snacks (9.6)	Cookies or snacks (10.4)	Cookies or snacks (28.6)
6	Tobacco (7.3)	Cosmetics (9.7)	Cosmetics (27.5)
7	Liquor (5.6)	Souvenirs (7.0)	Souvenirs (14.4)
8	Souvenirs (5.1)	Liquor (5.2)	Liquor (13.0)
9	Fashion accessories (4.5)	Fashion accessories (4.5)	Fashion accessories (9.9)
10	Health supplements (2.3)	Clothes (2.7)	Tea (7.0)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

02 Data on the tourists' spending in Jeju

■ Places to shop

- Airport JDC Duty Free Store received the most responses (53.7% of the total feedback) as a preferred place to shop.



02 Data on the tourists' spending in Jeju

■ Places to shop

- For the last three years, the top four preferred places to shop have not changed.

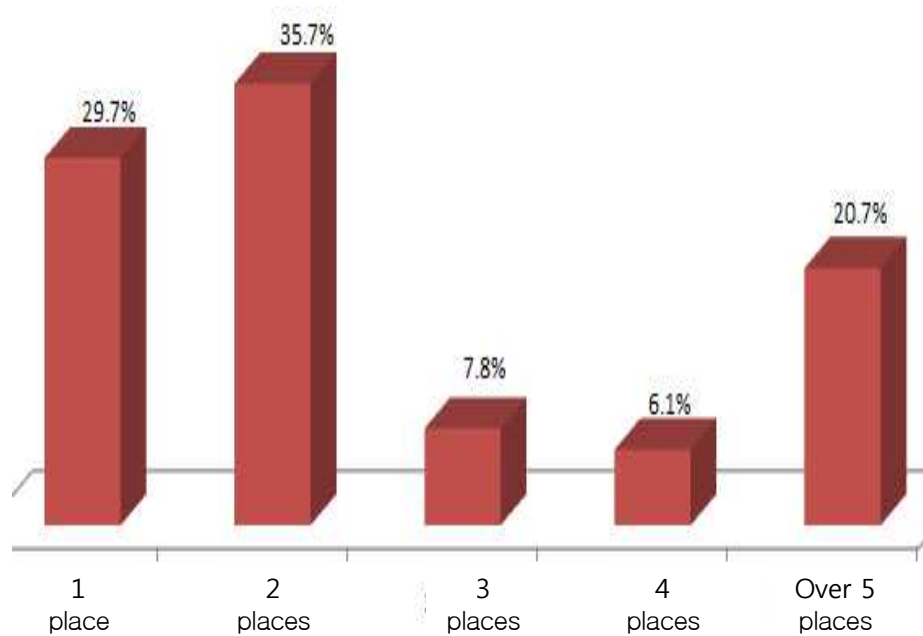
Rank	2014	2015	2016
1	Airport JDC Duty Free Store (26.4)	Airport JDC Duty Free Store (26.9)	Airport JDC Duty Free Store (53.7)
2	Traditional markets (23.3)	Traditional markets (24.6)	Traditional markets (48.5)
3	Shops within attractions (10.1)	Downtown commercial areas (12.5)	Downtown commercial areas (17.6)
4	Downtown commercial areas (8.8)	Shops within attractions (9.6)	Shops within attractions (16.9)
5	Large discount stores (8.3)	JTO Duty Free Store (7.5)	Large discount stores (12.7)
6	JTO Duty Free Store (6.9)	Large discount stores (6.9)	JTO Duty Free Store (11.5)
7	Agricultural food stores (6.2)	Agricultural food stores (4.0)	Agricultural food stores (7.8)
8	Local specialty shops (5.2)	Local specialty shops (3.4)	Local specialty shops (5.8)
9	Lotte Duty Free Store (2.5)	Lotte Duty Free Store (2.4)	Lotte Duty Free Store (3.9)
10	Others(1.2)	Others(1.2)	Shilla Duty Free Store (2.3)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

02 Data on the tourists' spending in Jeju

■ (Package tourists) No. of places to shop

- The largest number of package tourists (35.7%) answered that they visit two places to shop.



Classification	2014	2015	2016
1 place	13.3	13.8	29.7
2 places	9.6	8.1	35.7
3 places	6.0	3.5	7.8
4 places	1.8	1.1	6.1
Over 5 places	4.2	1.8	20.7

03 Evaluation on tours in Jeju

Reasons why tourists are dissatisfied with tours in Jeju

- Expensive prices was the most common response (57.6% of the total answers) as the reason why tourists are dissatisfied with tours in Jeju.

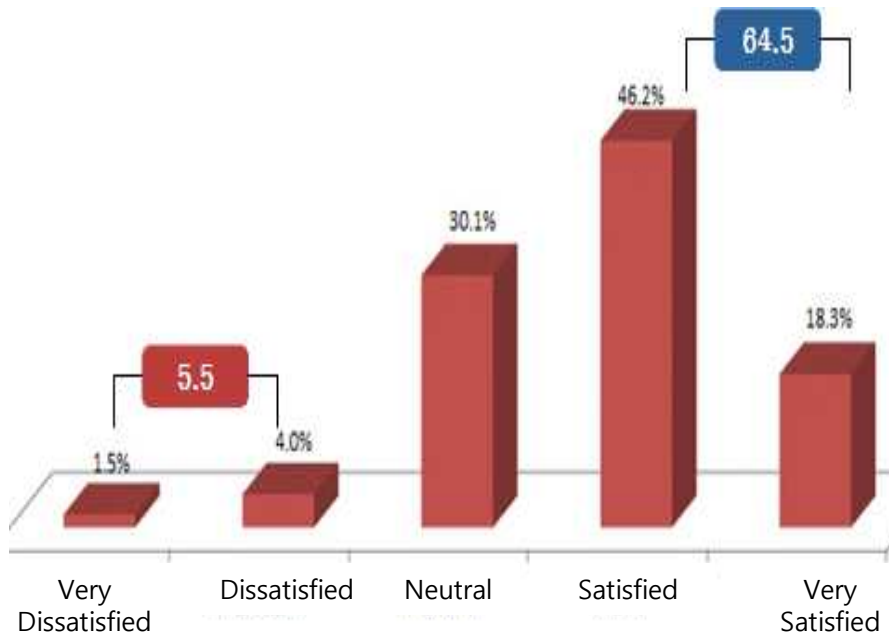
Rank	2014	2015	2016
1	Expensive prices(29.01)	Expensive prices(32.56)	Expensive prices(57.64)
2	Inconvenient public transportation(12.57)	Inconvenient public transportation(15.99)	Inconvenient public transportation(22.46)
3	Lack of variety in items to shop(11.67)	Lack of variety in items to shop(9.96)	Lack of variety in items to shop(17.01)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

03 Evaluation on tours in Jeju

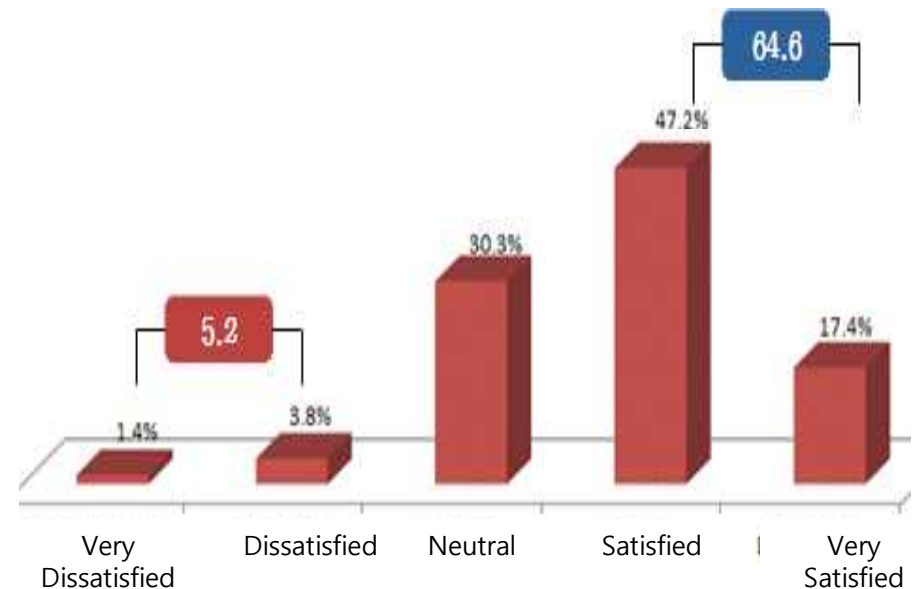
■ Process to use airport/ports

- The satisfaction score: 3.76



■ Facilities and services of airports, and ports

- The satisfaction score: 3.75

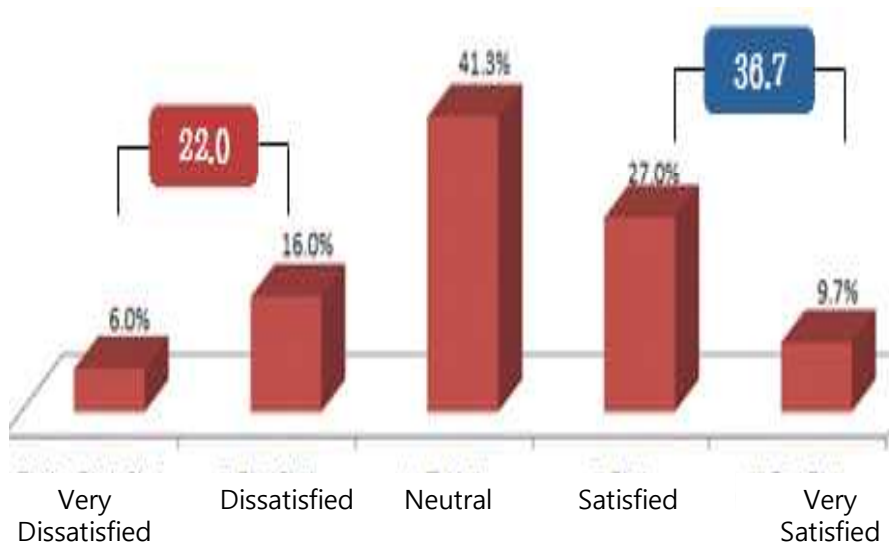


Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

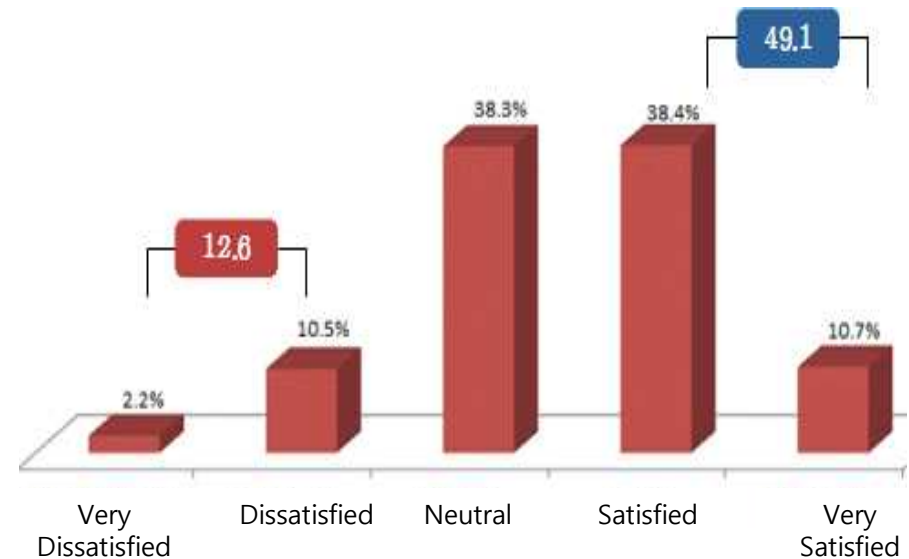
Public transportation

- The satisfaction score: 3.18



Traffic signs

- The satisfaction score: 3.45

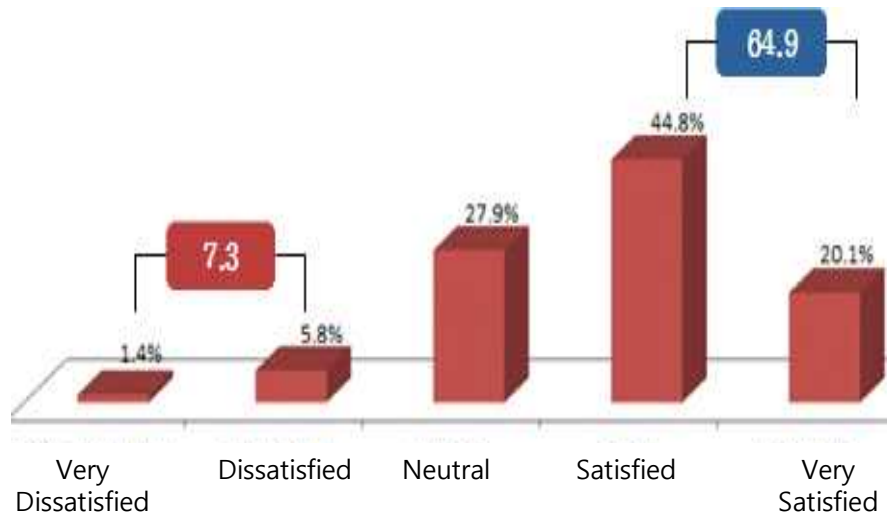


Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

■ Spectacles and entertainments

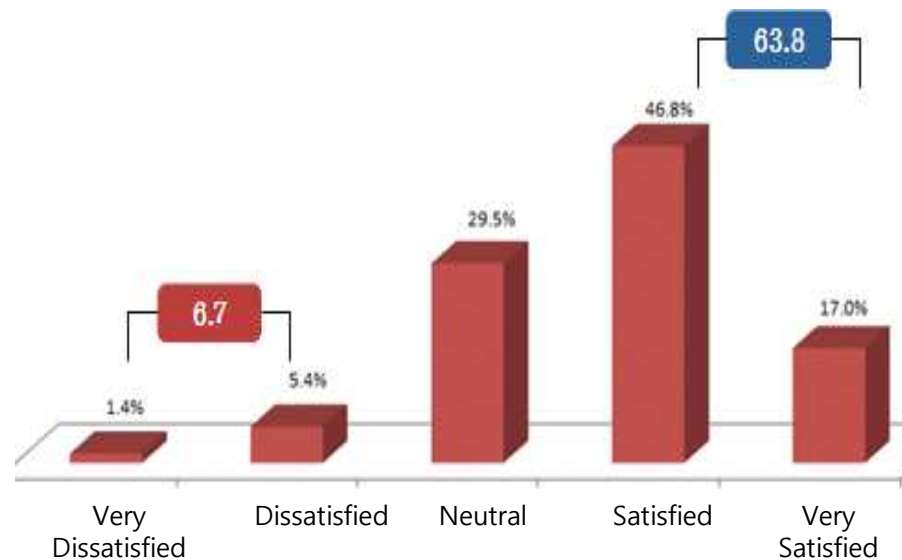
- The satisfaction score: 3.76



Classification	2014	2015	2016
Average	3.54	3.82	3.76

■ Tourist Attractions

- The satisfaction score: 3.73



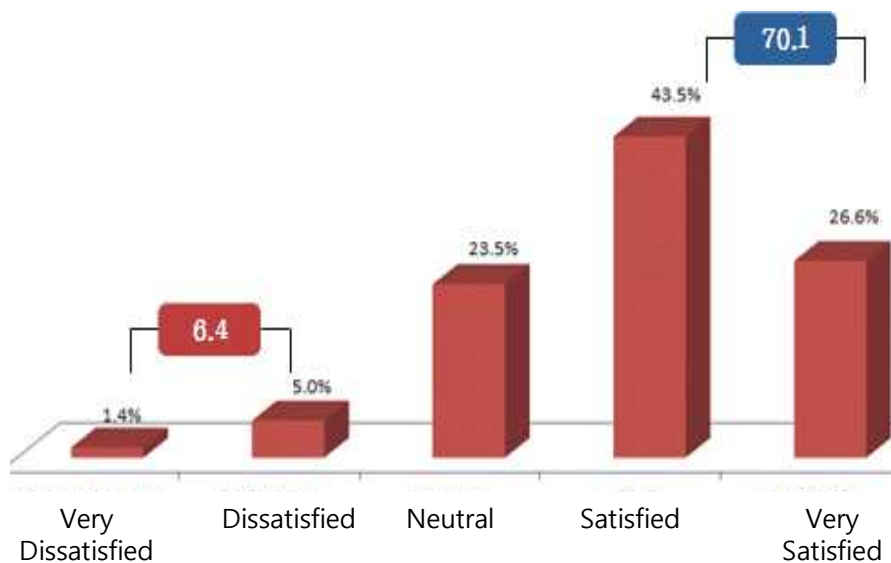
Classification	2014	2015	2016
Average	3.51	3.77	3.73

Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

■ Accommodations

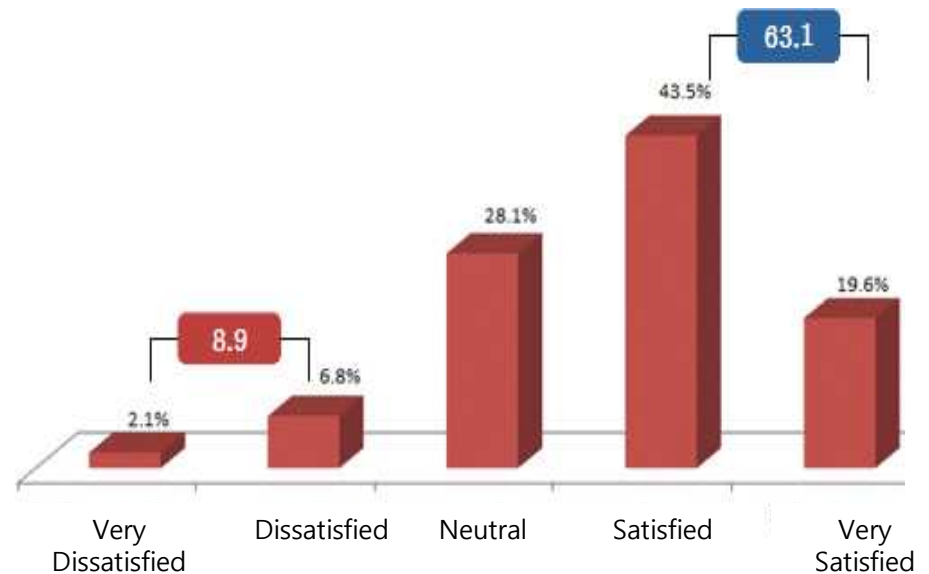
- The satisfaction score: 3.89



Classification	2014	2015	2016
Average	3.62	3.87	3.89

■ Level of satisfaction on food

- The satisfaction score: 3.72



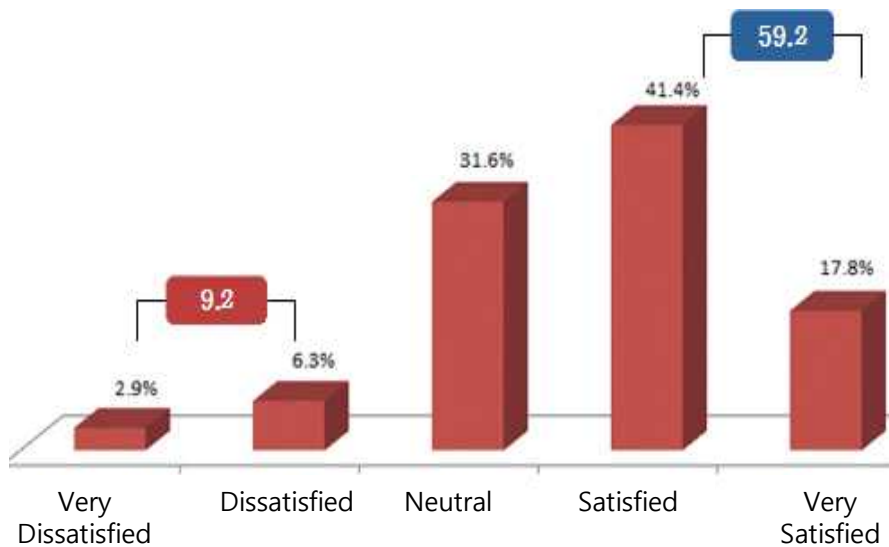
Classification	2014	2015	2016
Average	3.56	3.77	3.72

Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

■ Rental car and charter bus

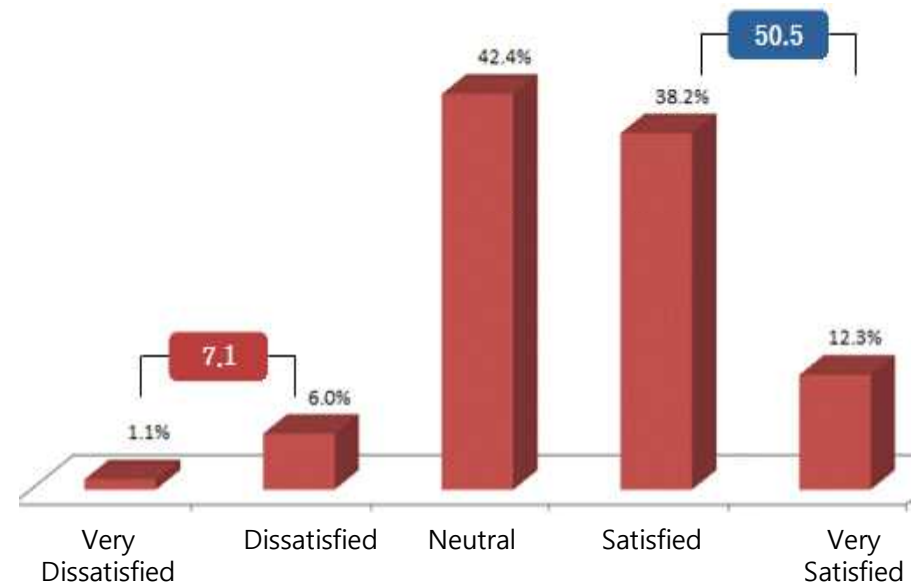
- The satisfaction score: 3.65



Classification	2014	2015	2016
Average	2.93	3.66	3.65

■ Level of satisfaction on shopping

- The satisfaction score: 3.55



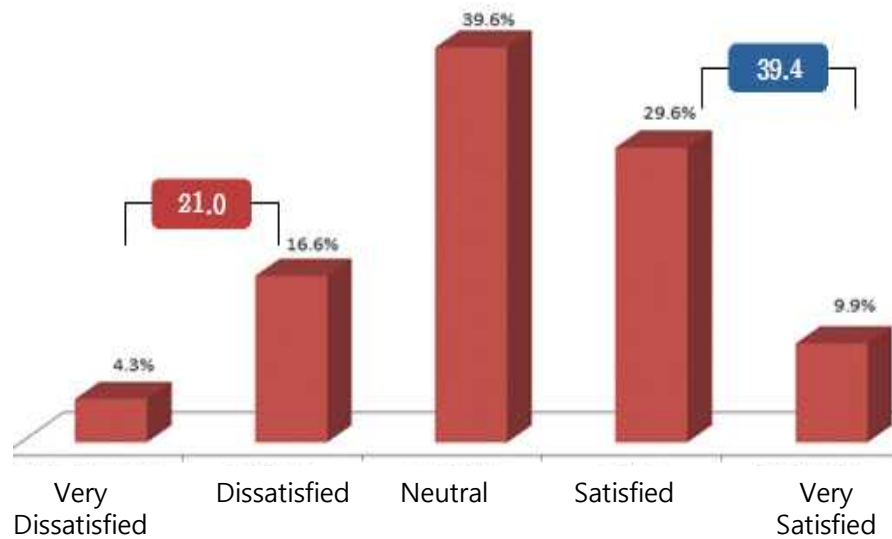
Classification	2014	2015	2016
Average	3.20	3.62	3.55

Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

Travel cost

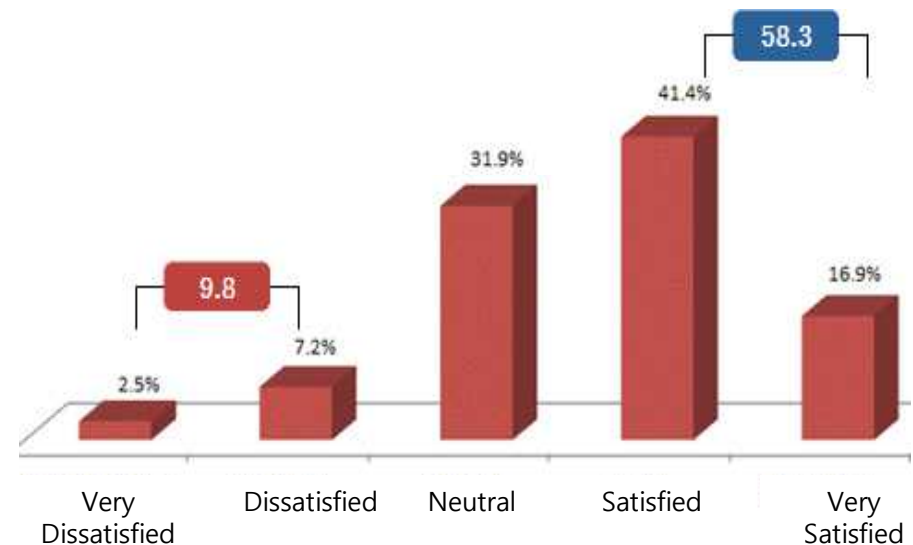
- The satisfaction score: 3.24



Classification	2014	2015	2016
Average	3.08	3.40	3.24

Kindness of residents

- The satisfaction score: 3.63



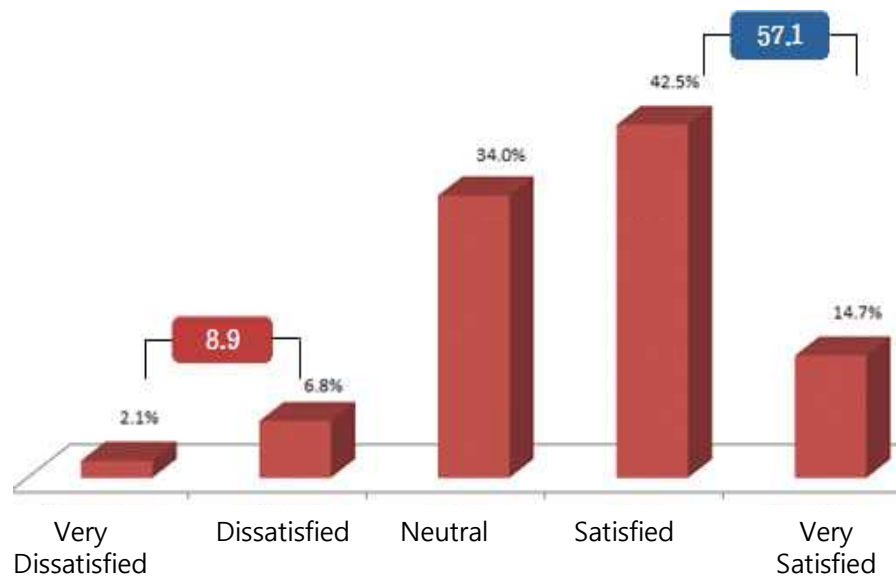
Classification	2014	2015	2016
Average	3.33	3.70	3.63

Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

Kindness of staff at attractions

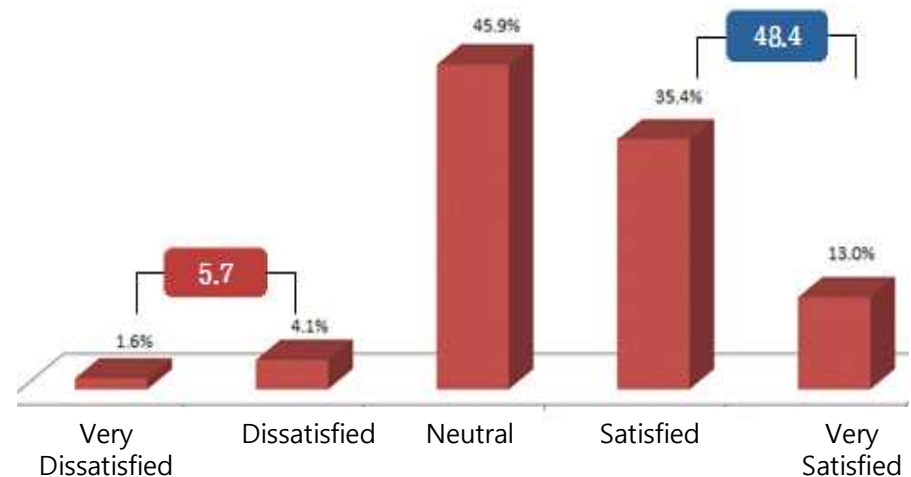
- The satisfaction score: 3.61



Classification	2014	2015	2016
Average	3.34	3.69	3.61

Service of tour guides

- The satisfaction score: 3.54



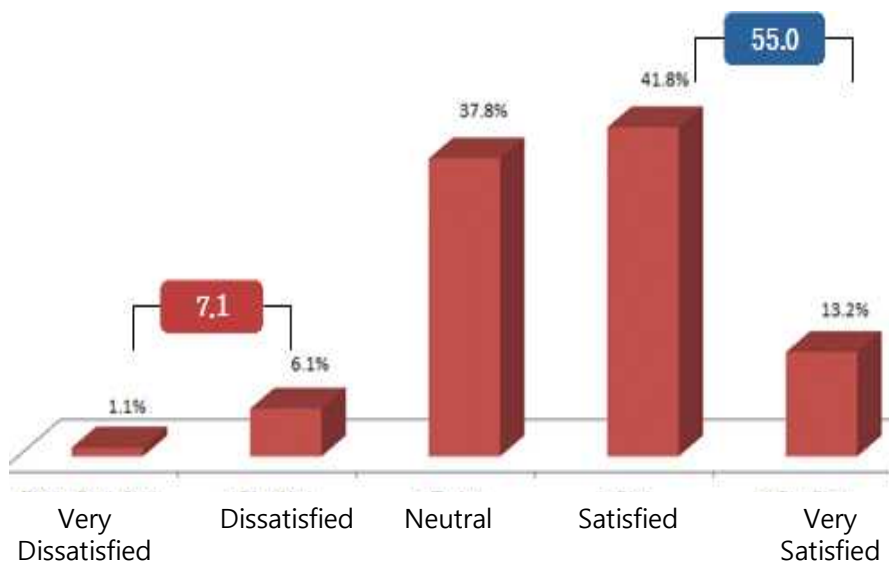
Classification	2014	2015	2016
Average	2.47	3.62	3.54

Chapter 2 Survey Results of Korean Travelers

03 Evaluation on tours in Jeju

■ Guidance on tour information

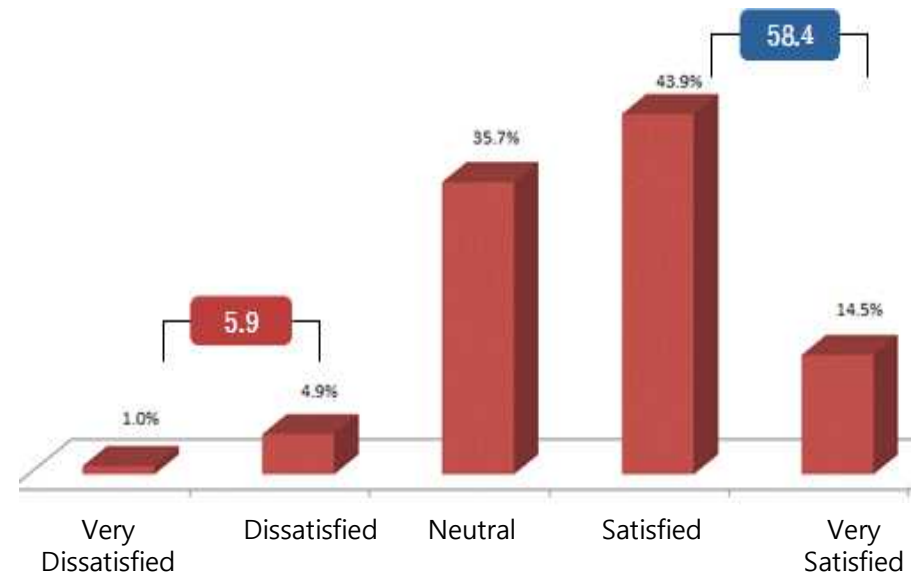
- The satisfaction score: 3.60



Classification	2014	2015	2016
Average	3.24	3.63	3.60

■ Tour guide map

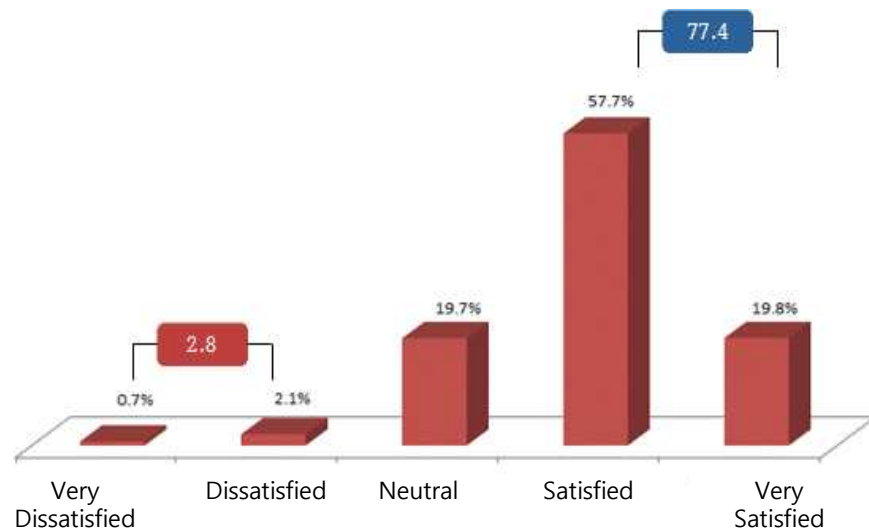
- The satisfaction score: 3.66



Classification	2014	2015	2016
Average	3.29	3.67	3.66

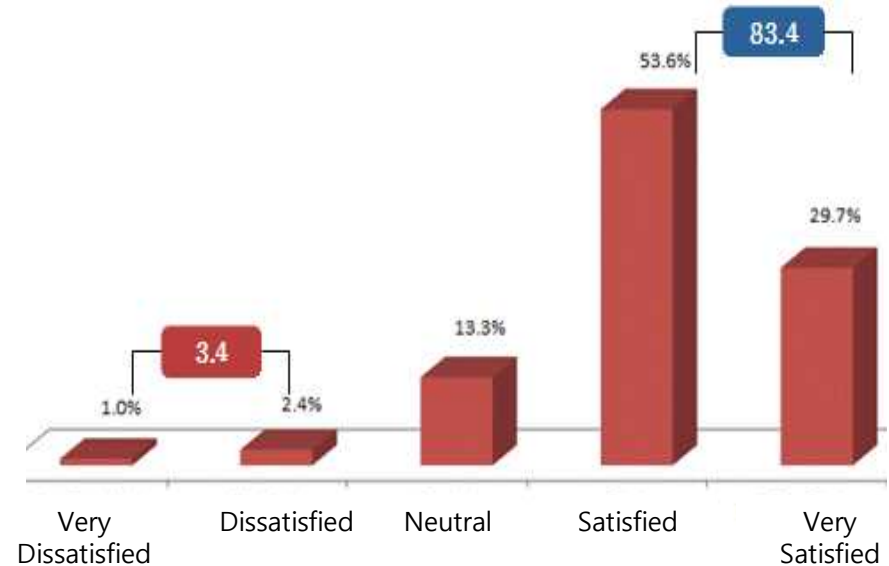
03 Evaluation on tours in Jeju

- Level of satisfaction on the overall tour experience in Jeju
 - The satisfaction score: 3.94



Classification	2014	2015	2016
Average	3.85	3.99	3.94

- Willingness to re-visit Jeju
 - The satisfaction score: 4.09

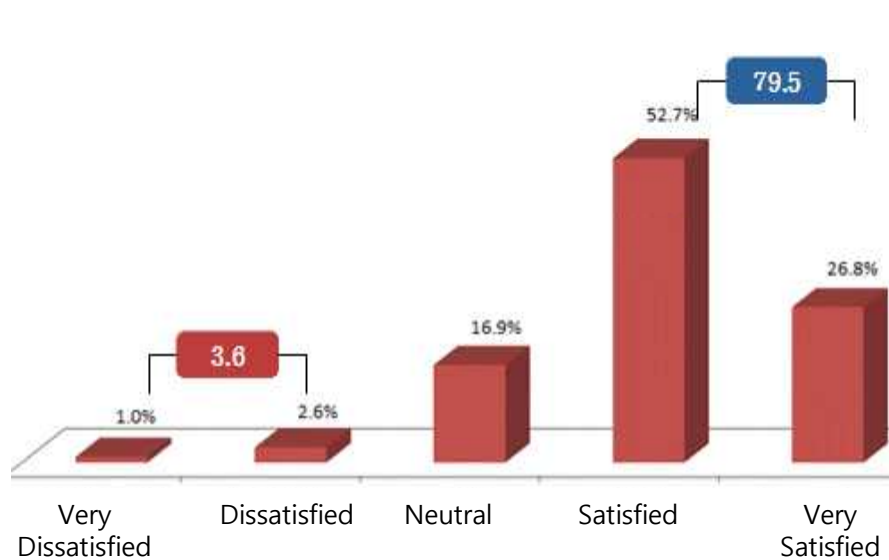


Classification	2014	2015	2016
Average	4.01	4.13	4.09

03 Evaluation on tours in Jeju

■ Willingness to recommend Jeju to others

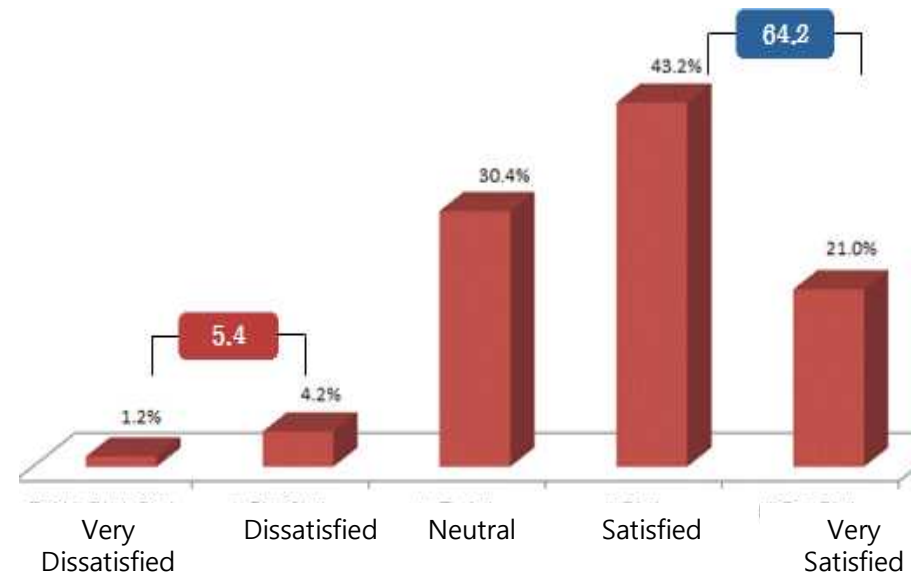
- The satisfaction score: 4.02



Classification	2014	2015	2016
Average	3.94	4.07	4.02

■ Image improvement on Jeju

- The improvement score: 3.79



Classification	2014	2015	2016
Average	3.71	3.87	3.79

Chapter 3

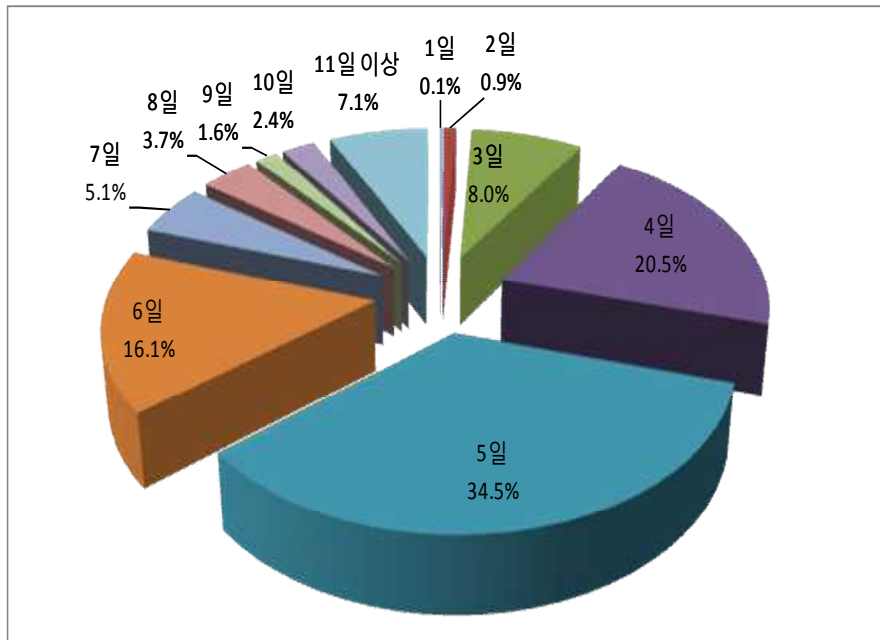
Survey Results on the Foreign Travelers

- 01. Data on the travels in Jeju**
- 02. Data on the tourists' spending in Jeju**
- 03. Evaluation on tours in Jeju**

01 Data on the travels in Jeju

■ Duration of stay in Korea

- The average duration of stay in Korea was 6.55 days.



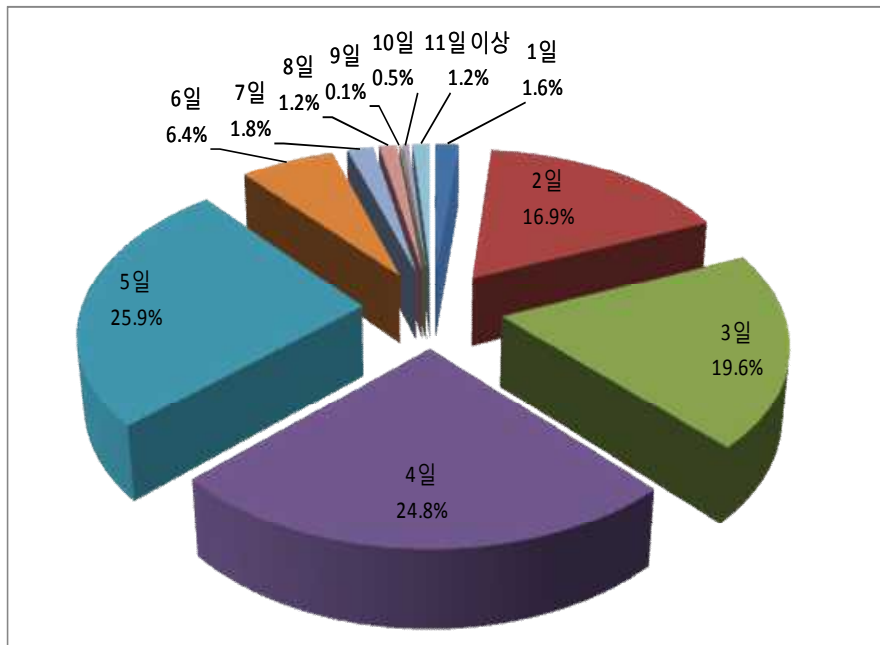
Classification	2014	2015	2016
Average staying duration	7.17 days	12.0 days	6.55 days
Under 2 days	1.0	1.5	1.0
3 days	1.5	7.2	8.0
4 days	19.6	18.9	20.5
5 days	40.3	36.1	34.5
Over 6 days	37.6	36.2	36.0

※ In the duration of stay in Korea, the option of over 365 days is also included.

01 Data on the travels in Jeju

■ Duration of stay in Jeju

- The average duration of stay in Jeju was 4.13 days.



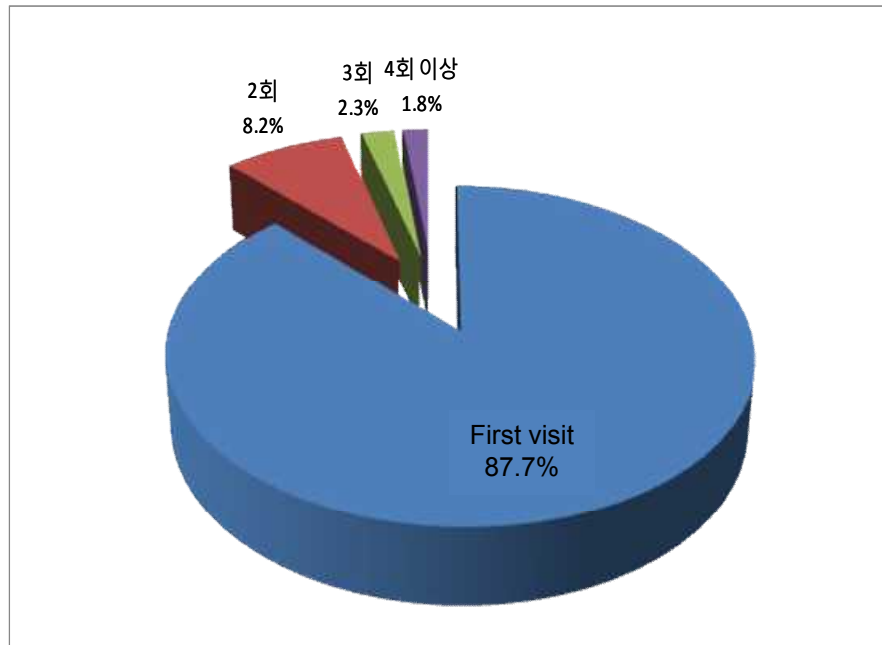
Classification	2014	2015	2016
Average staying duration	3.02 days	4.45 days	4.13 days
Under 2 days	54.9	16.2	18.5
3 days	16.5	17.1	19.6
4 days	17.2	22.9	24.8
5 days	7.8	29.3	25.9
Over 6 days	3.6	14.5	11.2

※ In the duration of stay in Jeju, the option of up to 365 days is included.

01 Data on the travels in Jeju

Frequency of visits to Jeju (for the past 3 years)

- One time visits accounted for 32.6%, the highest portion of visiting frequency to Jeju (for the past 3 years)

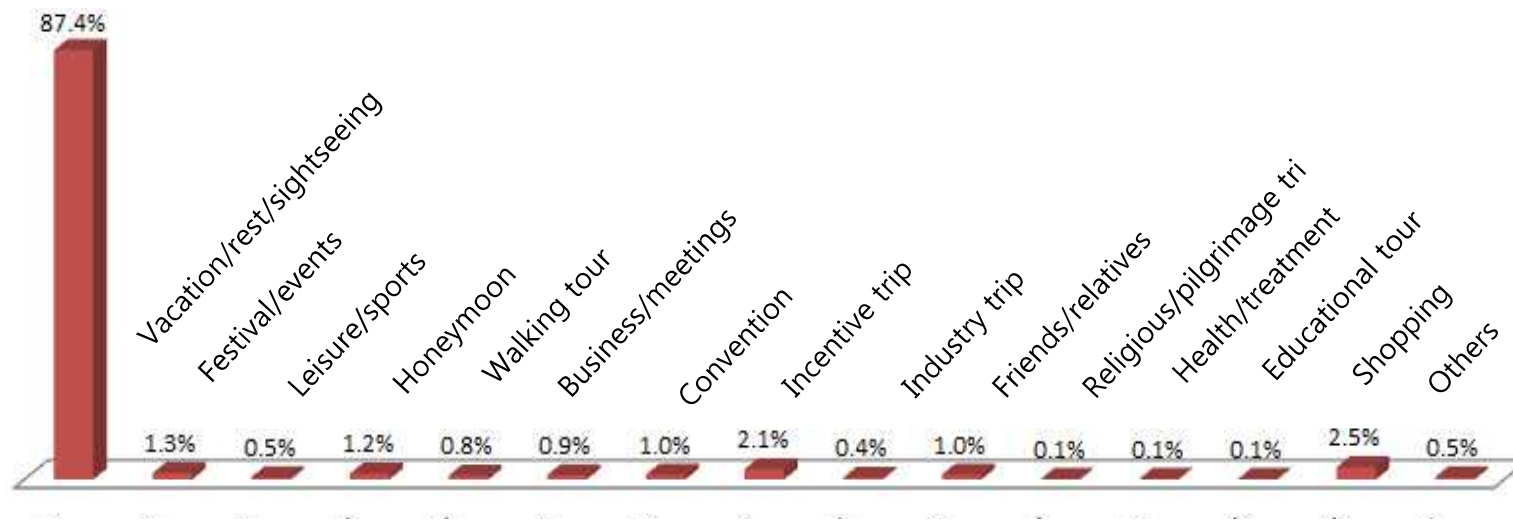


Classification	2014	2015	2016
First visit	89.3	86.6	87.7
Visit twice	7.5	7.1	8.3
Visit three times	1.2	2.5	2.3
Visit more than four times	1.9	3.8	1.8

01 Data on the travels in Jeju

■ Purpose of visits

- The largest number of people (87.4% of the total respondents) answered that they visit Jeju to take a vacation, get some rest, and visit attractions.



01 Data on the travels in Jeju

■ Purpose of visits

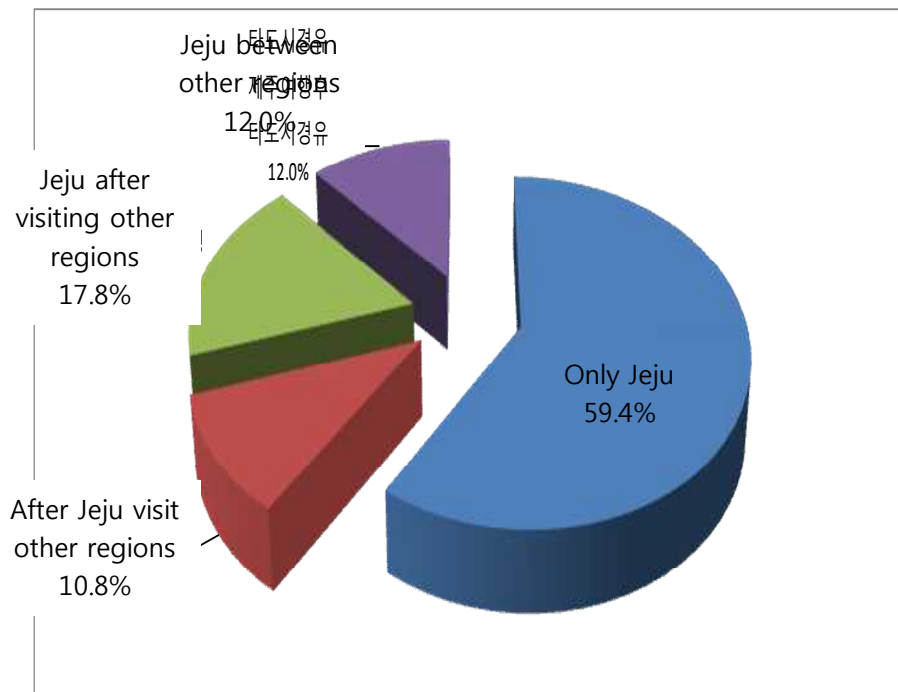
- For every year, more people visit Jeju for vacation, rest, and sightseeing and also slightly more people visit Jeju for shopping.

Classification	2014	2015	2016
Vacation, rest, and sightseeing	85.0	84.4	87.4
Festival and events	2.7	2.4	1.3
Leisure and sports	0.5	0.7	0.5
Honeymoon tour	2.2	1.0	1.2
Walking tour (Olle trail, etc)	0.6	1.0	0.8
Business trip or attending meetings	0.5	0.9	0.9
Convention or academic event	0.9	1.8	1.0
Incentive trip from workplace	2.4	2.8	2.1
Field trip on the industry	0.5	0.4	0.4
Visit to friends or relatives	0.8	1.1	1.0
Religious or pilgrimage trip	0.0	0.2	0.1
Health and treatment	0.0	0.1	0.1
Educational tour (school excursion, etc.)	1.4	0.4	0.1
Shopping	1.1	2.3	2.5
Others	1.4	0.7	0.5

01 Data on the travels in Jeju

Itinerary

- The largest number of people (59.4% of the total respondents) answered that they only included Jeju for their itinerary.

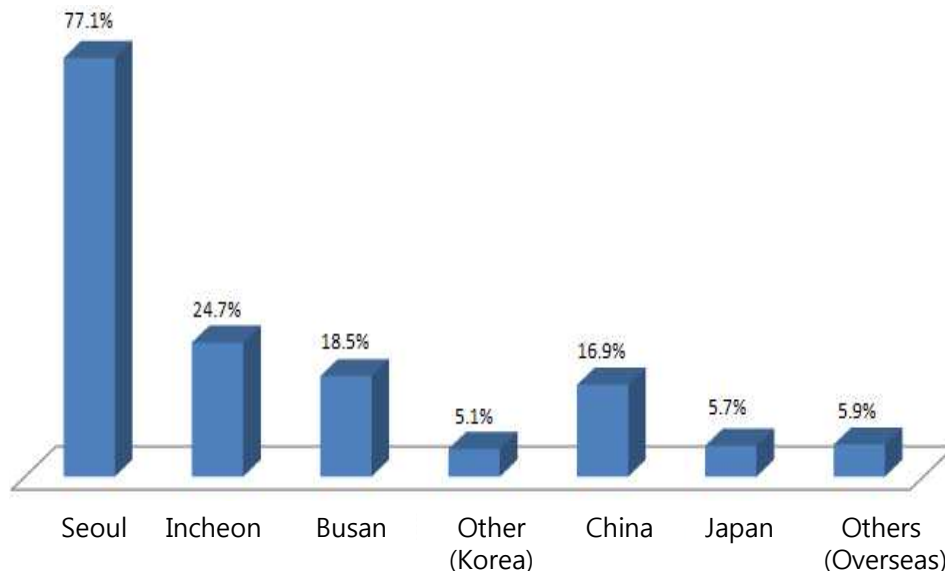


Classification	2014	2015	2016
Travel only in Jeju	12.9	62.5	59.4
After travel in Jeju, visit other regions	32.2	11.2	10.8
Travel Jeju after visiting other regions	22.4	13.6	17.8
Travel Jeju between visits to other regions	32.5	12.7	12.0

01 Data on the travels in Jeju

Destinations other than Jeju

- The largest number of people (77.1% of the total answers) selected Seoul as their tour destination other than Jeju.



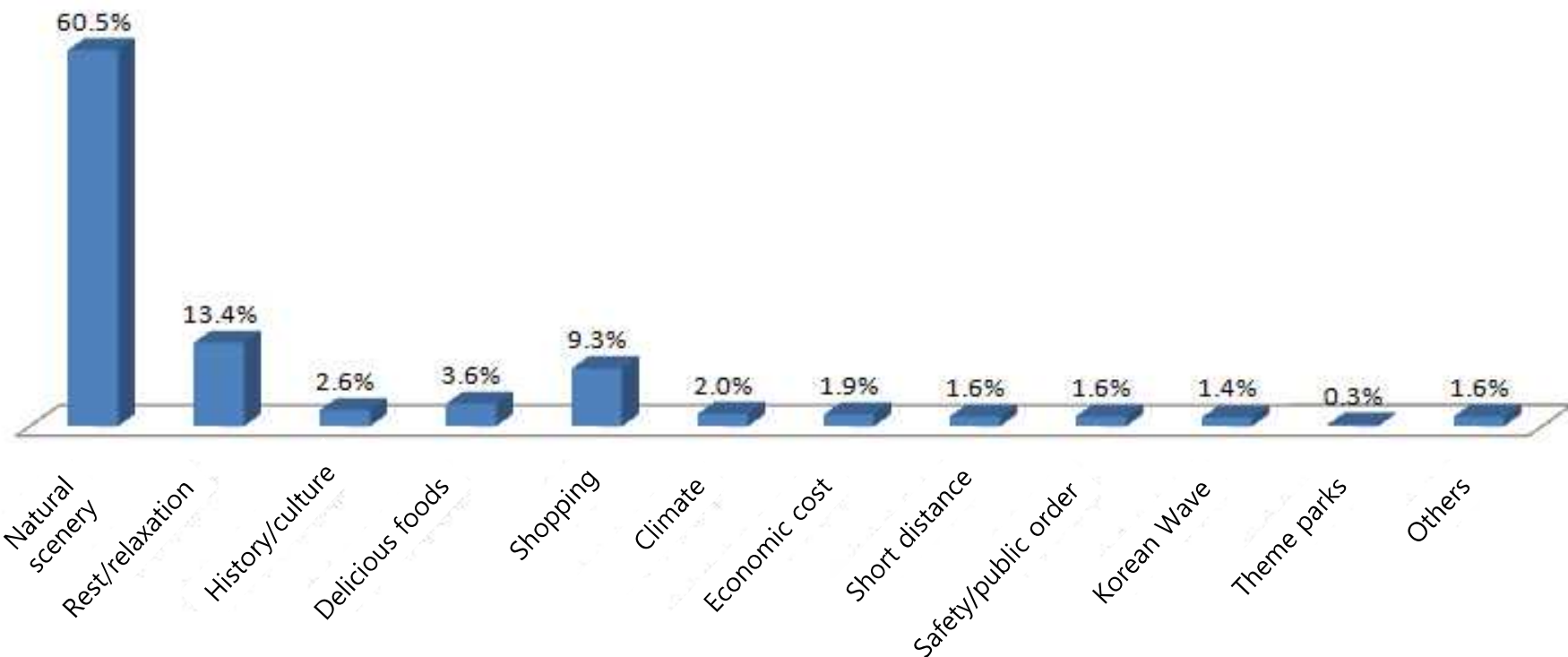
Classification	2014	2015	2016
Seoul	59.3	44.2	77.1
Incheon	14.8	12.5	24.6
Busan	7.4	9.4	18.5
Other regions in Korea	2.8	4.9	5.1
China	11.0	16.4	16.9
Japan	3.0	6.5	5.7
Others (Overseas)	1.9	6.1	5.9

※In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay closer attention to such differences.

01 Data on the travels in Jeju

Reasons why tourists selected Jeju

- The largest number of people (60.5% of the total respondents) selected Jeju to enjoy natural scenery.



01 Data on the travels in Jeju

Reasons why tourists selected Jeju

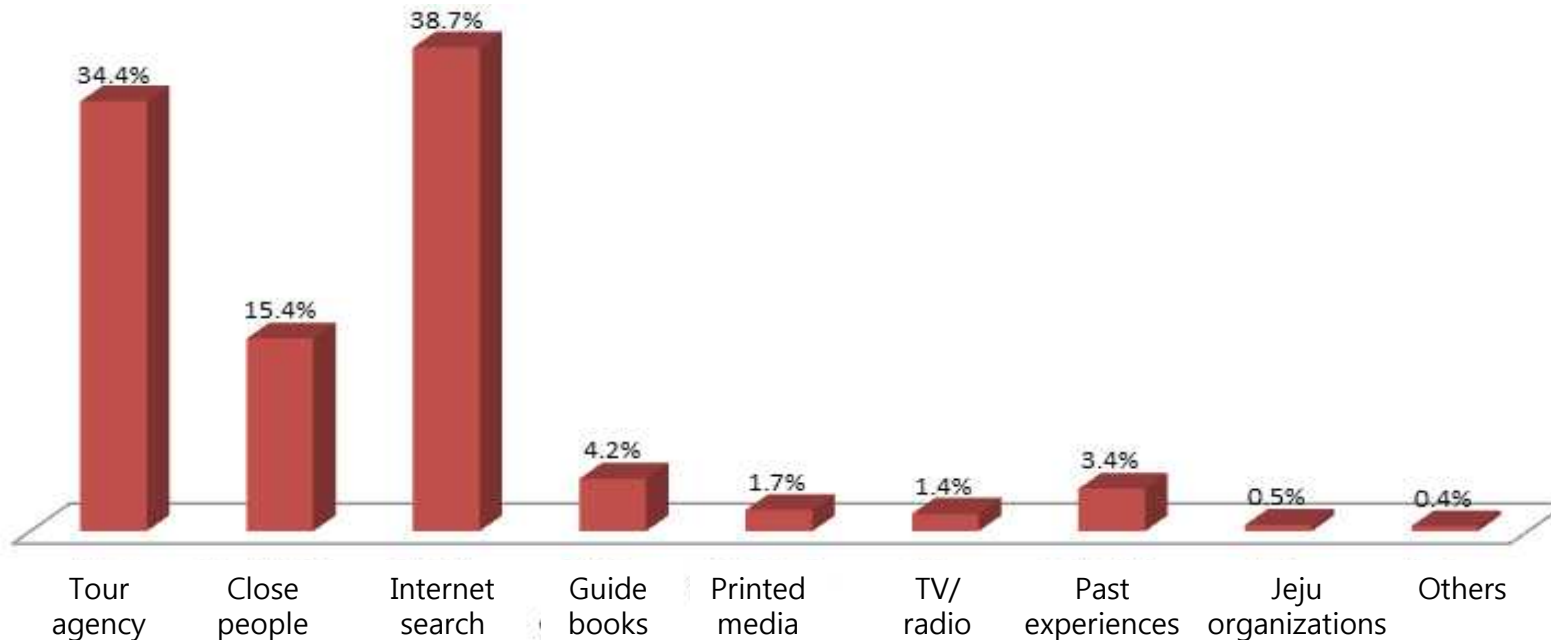
- For every year, more people visit Jeju for rest, relaxation and shopping.

Classification	2014	2015	2016
Natural scenery	63.3	61.3	60.5
Rest and relaxation	12.8	12.9	13.4
Historic and cultural experience	3.9	2.9	2.6
Culinary and gourmet tour	3.1	4.0	3.6
Shopping	6.7	7.7	9.3
Climate and four seasons	2.6	2.0	2.0
Travel cost	0.8	1.6	1.9
Short distance	0.6	1.6	1.6
Safety and public order	2.7	2.0	1.6
Korean Wave attractions	2.2	1.5	1.4
Theme parks	0.2	0.3	0.3
Others	0.9	2.0	1.6

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

- The largest number of people (38.6% of the total respondents) collected their tour information by online search.



※Options of "Organizations within Jeju such as provincial government, Jeju Tourism Organization, and Jeju Tourism Association" were added for the 2016 survey.

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

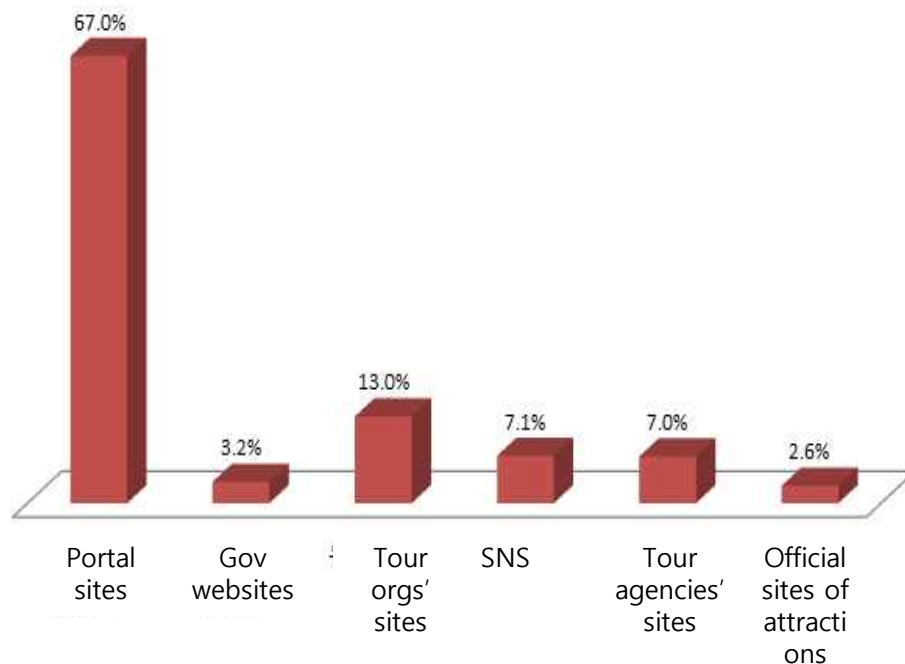
- Compared to the 2015 data, a slightly larger number of people use Internet searches and tour agencies to get tour information.

Rank	2014	2015	2016
1	Tour agency (49.0)	Internet search (37.2)	Internet search (38.7)
2	Relatives, friends, or colleagues(12.7)	Tour agency (32.2)	Tour agency (34.4)
3	Internet search (27.7)	Relatives, friends, or colleagues(18.3)	Relatives, friends, or colleagues(15.4)
4	Tour guide books (5.0)	Tour guide books (5.6)	Tour guide books (4.2)
5	Newspaper, magazines, or books(2.1)	Past experiences (3.4)	Past experiences (3.4)

01 Data on the travels in Jeju

Route for tour information (knowledge) collection

- The largest number of people (67.0% of the total respondents) selected portal sites as their main source of online information collection.

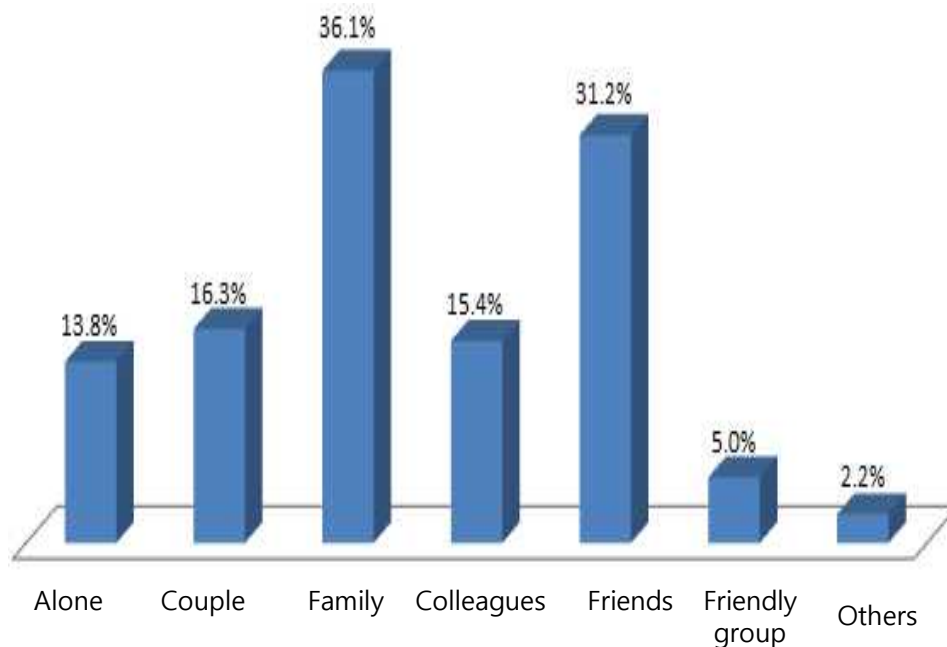


Classification	2014	2015	2016
Search at portal sites (Google, etc.)	69.6	53.2	67.0
Sites of government (Ministry or provincial government)	4.9	1.7	3.2
Tourism related organizations' sites (JTO or Jeju tourism associations)	12.3	6.2	13.0
SNS channels (Facebook, etc.)	5.1	3.7	7.1
Tour agencies' sites	6.5	4.1	7.0
Official websites of attractions or facilities	1.6	1.8	2.6

01 Data on the travels in Jeju

■ Type of companions

- Family members or relatives (36.1%) were the most preferred companions for tours.



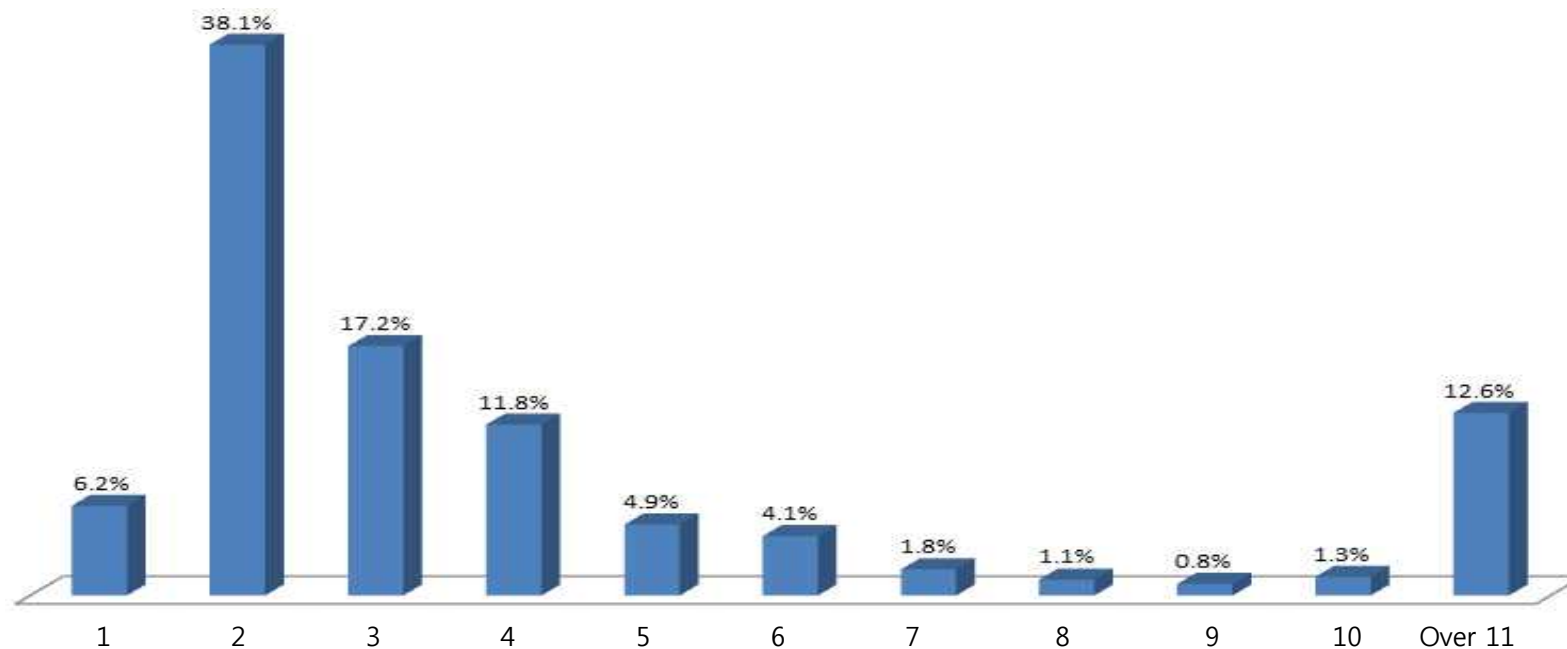
Classification	2014	2015	2016
Alone	3.9	11.5	13.8
Married couple or lovers	10.7	19.9	16.3
Family members or relatives	27.7	24.4	36.1
Colleagues	17.5	17.4	15.4
Friends	23.5	27.4	31.2
Members of friendly communities	11.5	3.5	5.0
Others	5.2	2.8	2.2

※In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

01 Data on the travels in Jeju

■ Number of companions

The average number of companions was 5.55.

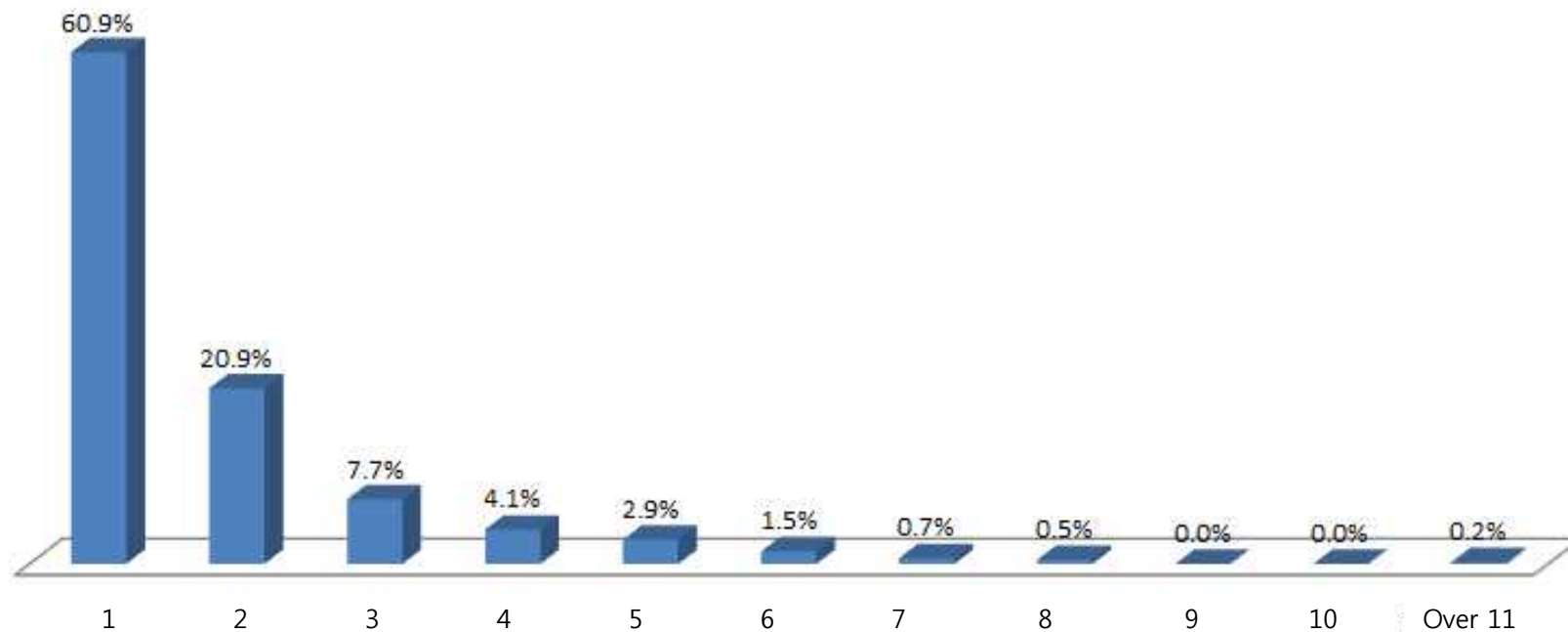


Classification	2014	2015	2016
Average no. of companions	9.86	6.21	5.55

01 Data on the travels in Jeju

■ Number of companions aged under 15

- The average number of companions under the age of 15 was 1.85.

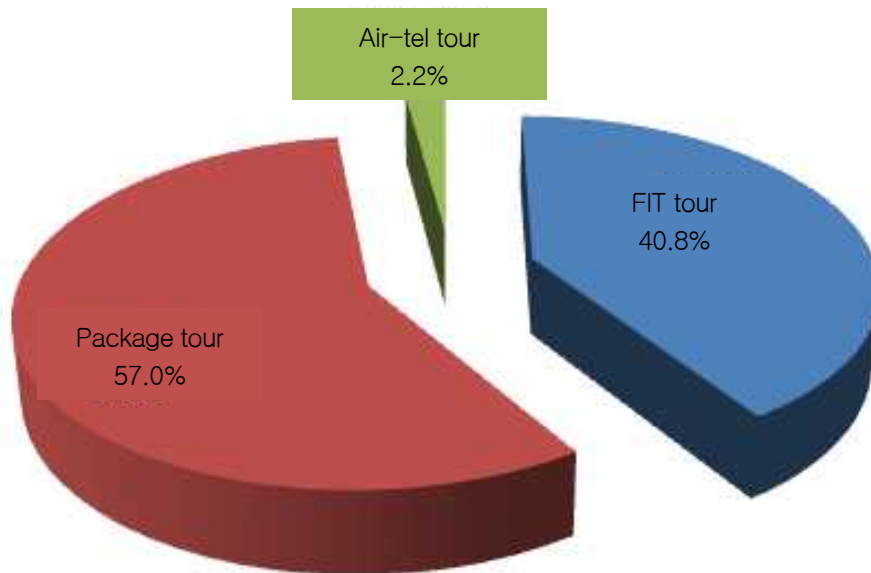


※ This option was newly added from the 2016 survey.

01 Data on the travels in Jeju

■ Type of tours

- In the 2016 survey, the largest number of foreign tourists (57.0% of the total respondents) traveled to Jeju as an individual traveler.

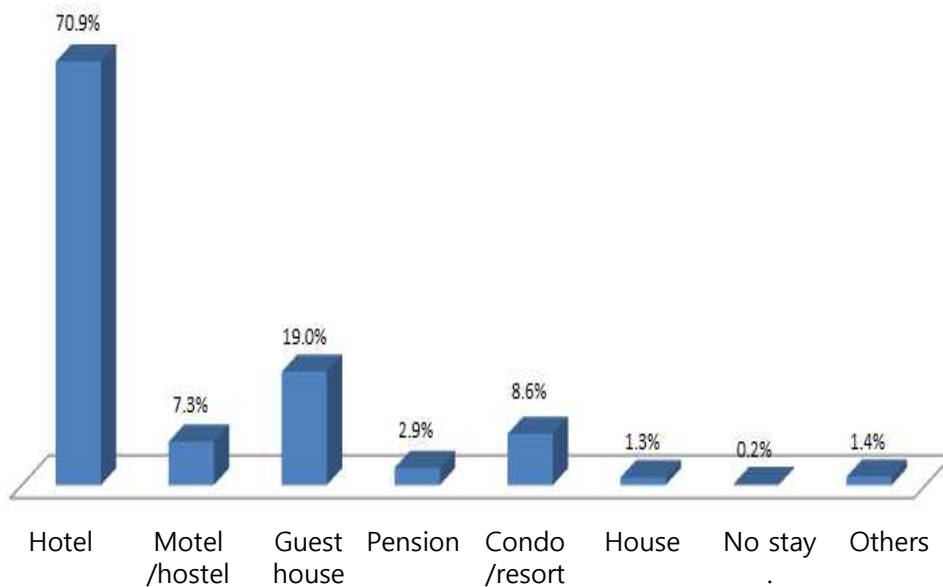


Classification	2014	2015	2016
F.I.T. (Free independent tour)	24.6	46.7	40.8
Packaged tour	70.9	50.2	57.0
Air-tel tour	4.5	3.1	2.2

01 Data on the travels in Jeju

■ Type of accommodation

- The largest number of people (70.9% of the total respondents) stayed in hotels.



Classification	2014	2015	2016
Hotel	62.9	73.4	70.9
Motel or hostel	6.5	8.0	7.3
Guest house	11.2	12.8	19.0
Pension	5.9	3.7	2.9
Condominium or resort	10.1	7.1	8.6
House of relatives or friends	1.3	1.7	1.3
I didn't stay.	—	—	0.2
Others	2.2	1.2	1.4

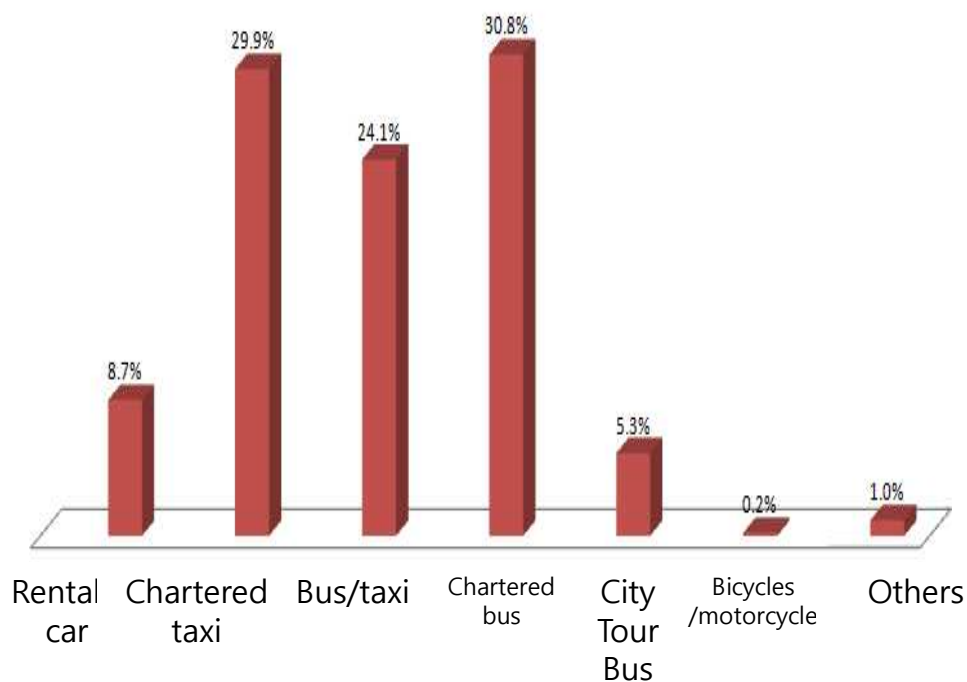
※ In 2016 survey, "I didn't stay" was added as the option. Also "Hotel" and "Tourist Hotel" were consolidated as "Hotel".

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

01 Data on the travels in Jeju

■ Main transportation

- The largest number of people (30.8% of the total respondents) selected charter buses as their main transportation.



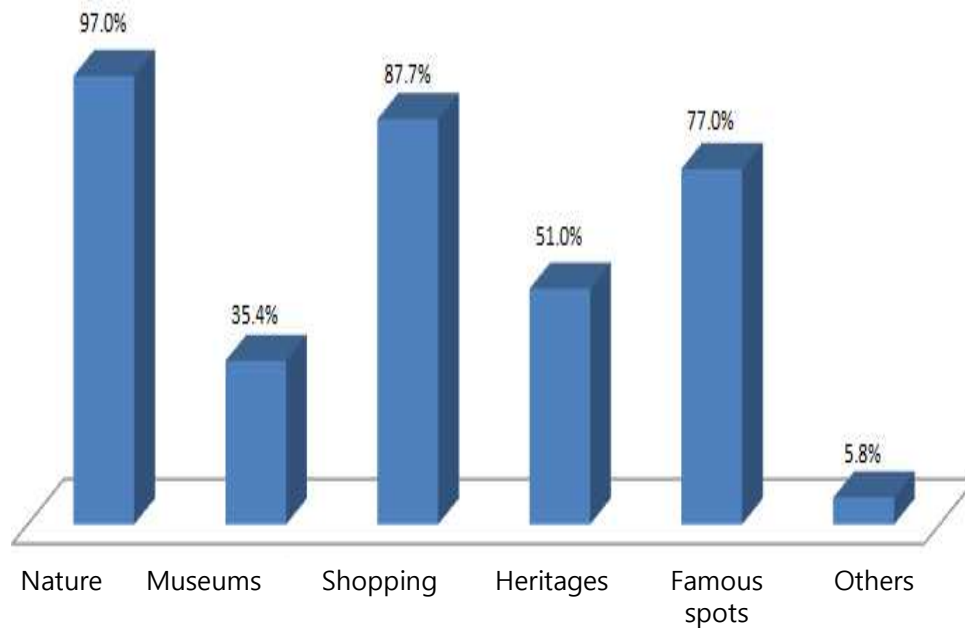
Classification	2014	2015	2016
Rental car	6.2	10.0	8.7
Rental car run with a tour guide or chartered taxi	46.2	38.1	29.9
Public transportation (bus, or taxi)	10.3	27.1	24.1
Chartered bus	25.8	17.1	30.8
City Tour Bus	9.0	6.3	5.3
Bicycles or motorcycle	0.3	0.4	0.2
Others	2.4	1.0	1.0

※ In the 2015 survey, there was an option of "a rental car with a tour guide, or a chartered taxi". In 2016 survey, the option became "chartered taxi (or a vehicle run with a tour guide)".

01 Data on the travels in Jeju

■ Main destinations of tours in Jeju

- The largest number of people (97.0% of the total respondents) selected natural scenery as their main destinations during their tour in Jeju.



Classification	2014	2015	2016
Natural scenery	39.7	43.6	97.0
Museums	8.2	7.2	35.4
Shopping	20.2	23.9	87.7
Cultural heritages	8.7	7.0	51.0
Other famous locations	23.2	18.2	77.0
Others	—	—	5.8

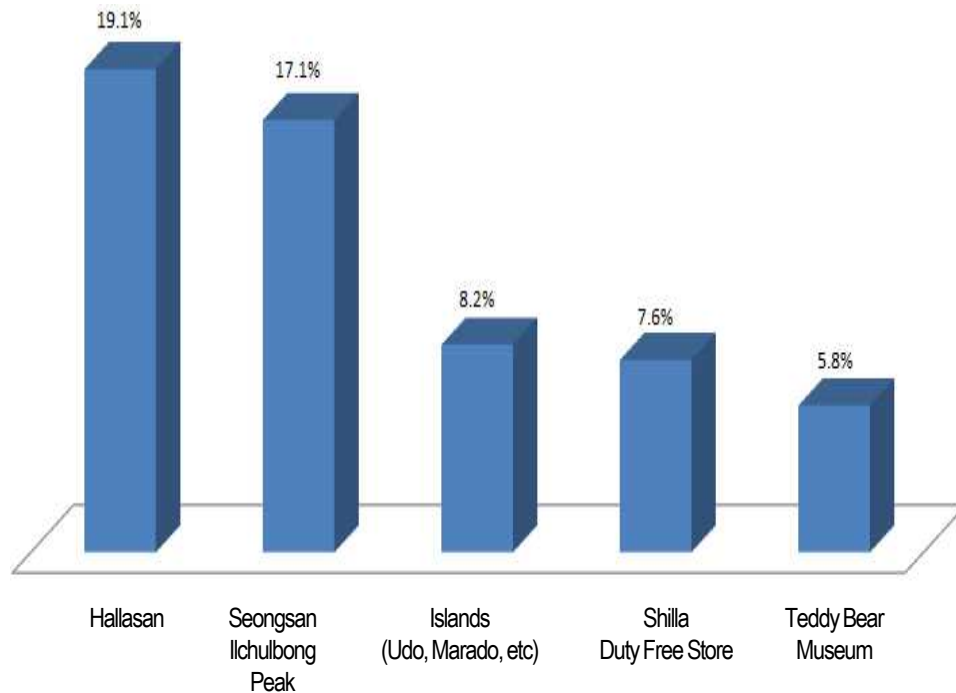
※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

※ In the 2016 survey, "Seogwipo Maeil Olle Market" was added as the option for Shopping.

01 Data on the travels in Jeju

■ Destinations tourists want to re-visit during their tour in Jeju

- Hallasan Mountain the most responses (19.1% of the total feedbacks) as the destination tourists want to revisit.

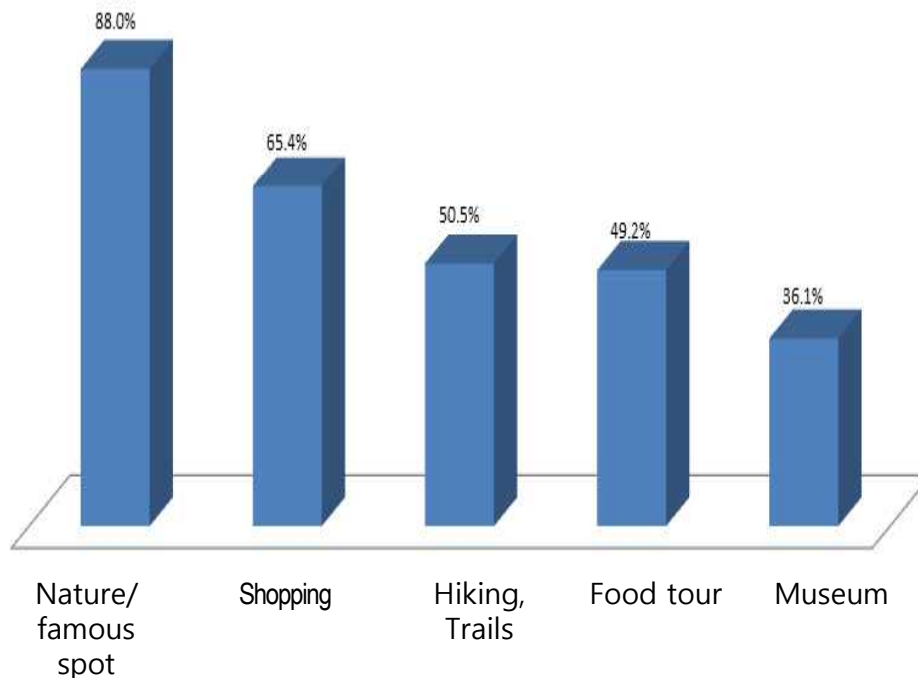


Rank	2014	2015	2016
1	Seongsan Ilchulbong Peak (21.9)	Hallasan (10.2)	Hallasan (19.1)
2	Hallasan (12.5)	Seongsan Ilchulbong Peak (8.9)	Seongsan Ilchulbong Peak (17.1)
3	Teddy Bear Museum (9.5)	Shilla Duty Free Store (3.6)	Islands (Udo, Marado, etc)(8.2)
4	Beaches (5.0)	Islands (Udo, Marado, etc)(2.7)	Shilla Duty Free Store (7.5)
5	Shilla Duty Free Store (4.8)	Beaches (2.7)	Teddy Bear Museum(5.8)

01 Data on the travels in Jeju

■ Activities during Jeju tour

- The largest number of people (88.0% of the total respondents) answered that they enjoy natural and famous scenery during their tour in Jeju.



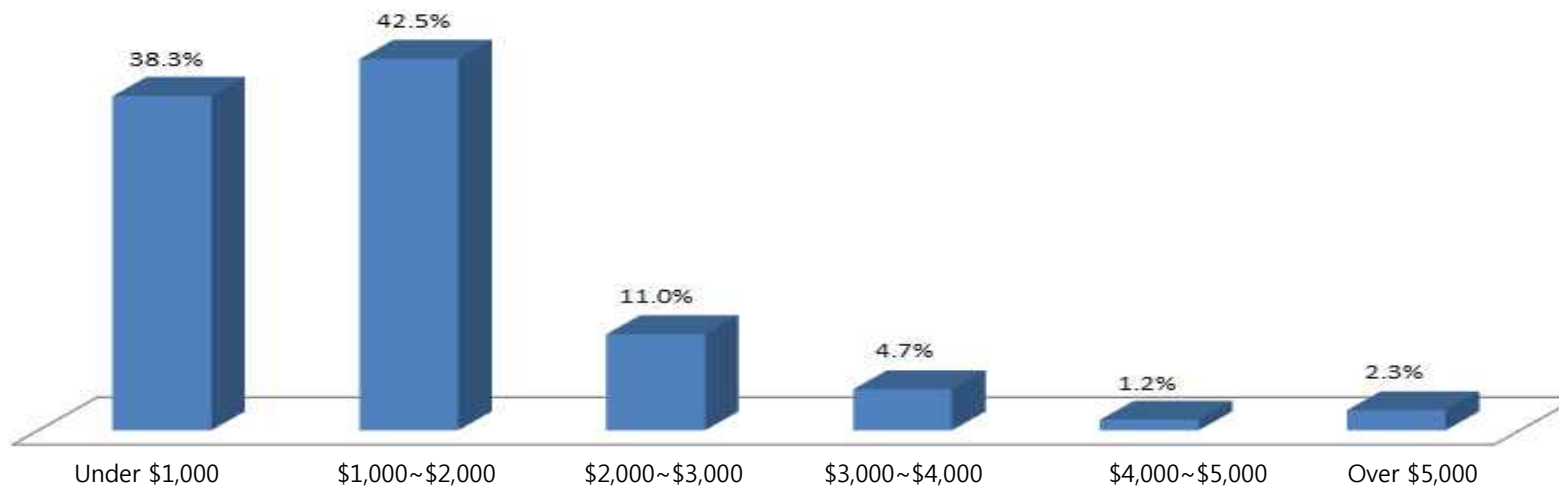
Ra nk	2014	2015	2016
1	Enjoying natural/famous scenery(18.3)	Enjoying natural/famous scenery(19.5)	Enjoying natural/famous scenery(88.0)
2	Shopping (13.4)	Shopping (13.5)	Shopping (65.4)
3	Mountain/Oreum/Olle Trail/Trekking(9.6)	Mountain/Oreum/Olle Trail/Trekking(10.4)	Mountain/Oreum/Olle Trail/Trekking(50.5)
4	Food tour (visiting good restaurants)(9.4)	Food tour (visiting good restaurants)(10.1)	Food tour (visiting good restaurants)(49.2)
5	Visiting museum or exhibitions(8.3)	Visiting museum or exhibitions(8.0)	Visiting museum or exhibitions(36.1)

※In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

02 Data on the tourists' spending in Jeju

■ Per capita spending by foreign tourists

- Foreign tourists' average per capita spending was US\$1,466.5.



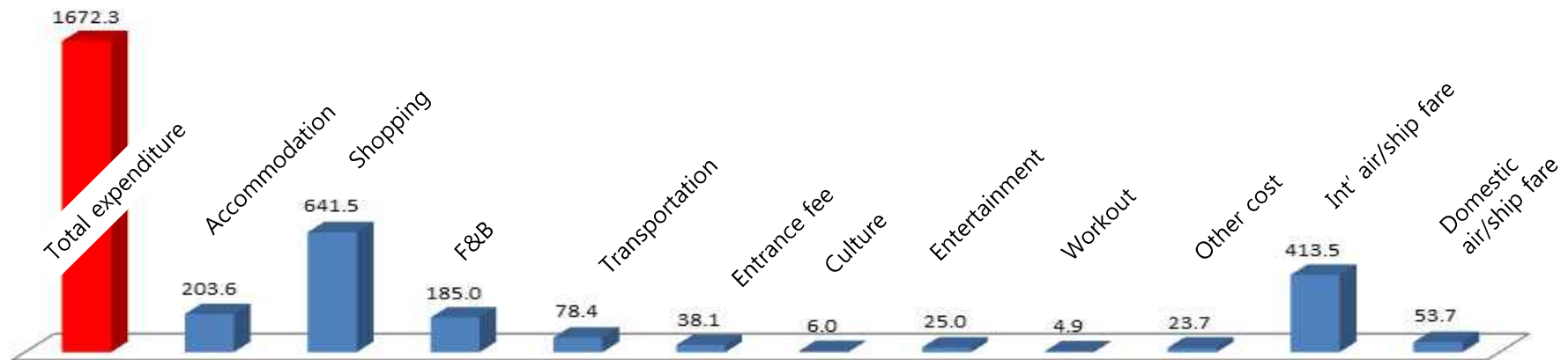
Classification	2014	2015	2016
Average	1,782.7 \$	1,520.3 \$	1,466.5 \$

※ When the amount was over US\$10,000, the data was excluded from the calculation for the average. But the respondent was included as the respondent whose per capita spending was over US\$5,000.

02 Data on the tourists' spending in Jeju

■ Per capita spending of F.I.T. tourist

- Foreign F.I.T. tourists' average per capita spending was US\$1,672.3.



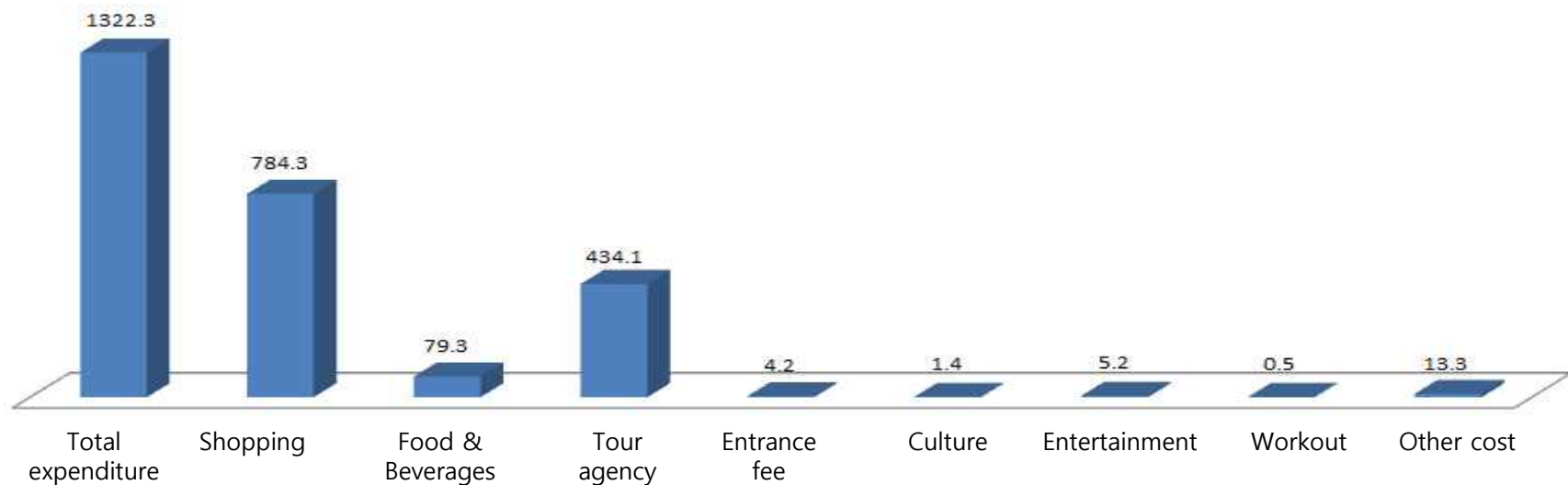
Classification	2014	2015	2016
Average	2,015.7 \$	1,732.1 \$	1,672.3 \$

※ The spending of F.I.T. Tourists includes international flight fare, domestic flight fare, ferry fare, and all other required costs.

02 Data on the tourists' spending in Jeju

■ Per capita spending of package tourist

- Package tourists' average per capita spending was US\$1,322.3.



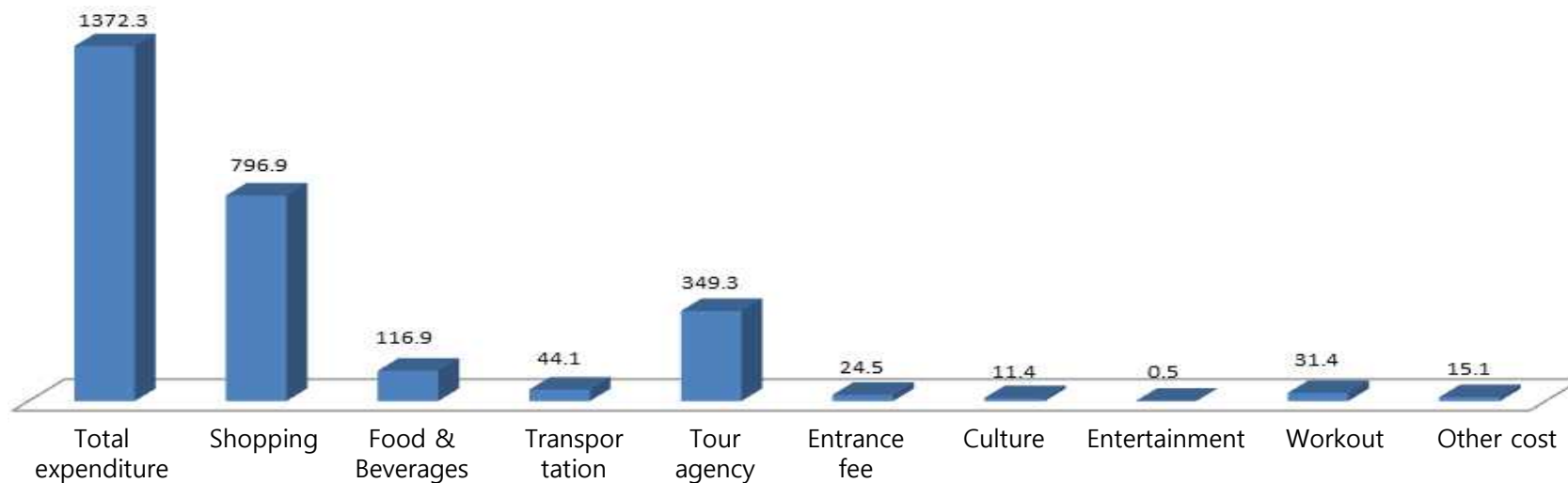
Classification	2014	2015	2016
Average	1,709.0 \$	1,304.7 \$	1,322.3 \$

※ Spending of package tourists includes the amount paid to the tour agencies and all other costs.

02 Data on the tourists' spending in Jeju

■ Per capita spending of Air-tel tourists

- Air-tel tourists' average per capita spending was US\$1,372.3.



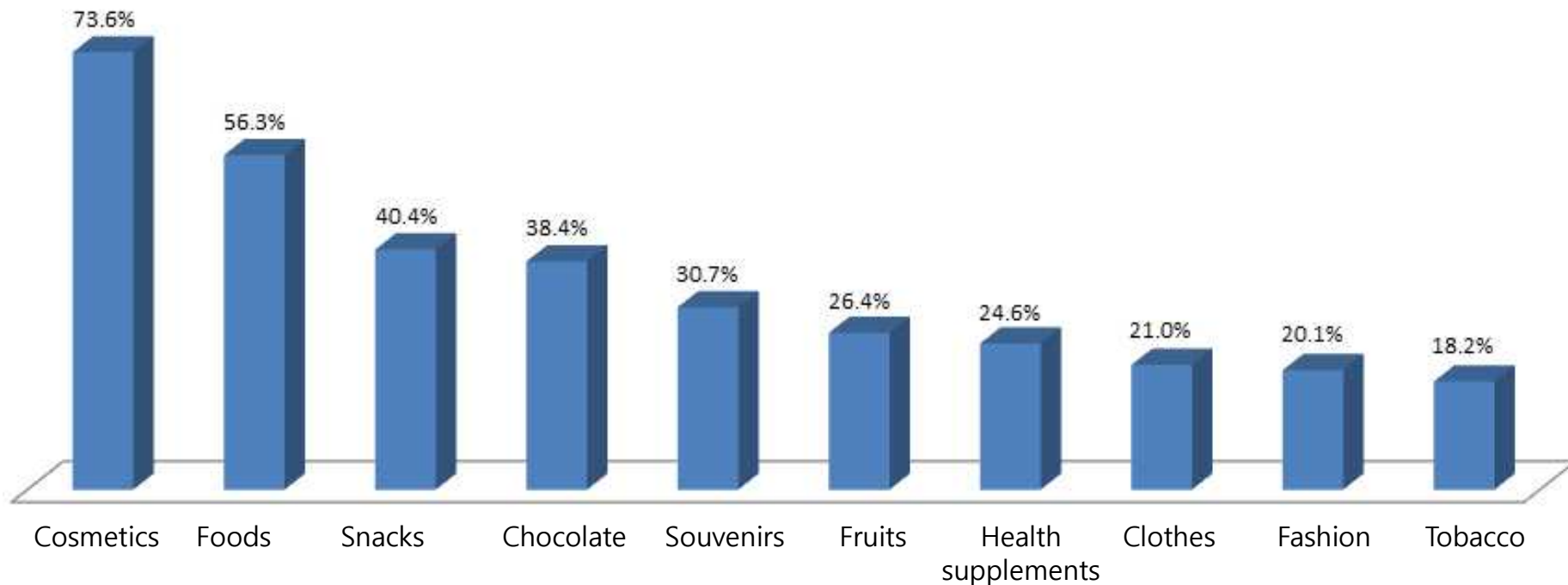
Classification	2014	2015	2016
Average	1,677.8 \$	1,861.3 \$	1,372.3 \$

※ Spending of Air-tel tourists includes the amount paid to the tour agencies and all other costs.

02 Data on the tourists' spending in Jeju

■ Main shopping items

- The largest number of people (73.6% of the total respondents) selected Cosmetics as their main shopping item.



02 Data on the tourists' spending in Jeju

■ Main shopping items

- For the past three years, respondents have shown a steady preference to cosmetics and foods products. In 2016, the share of cookies or snacks was high.

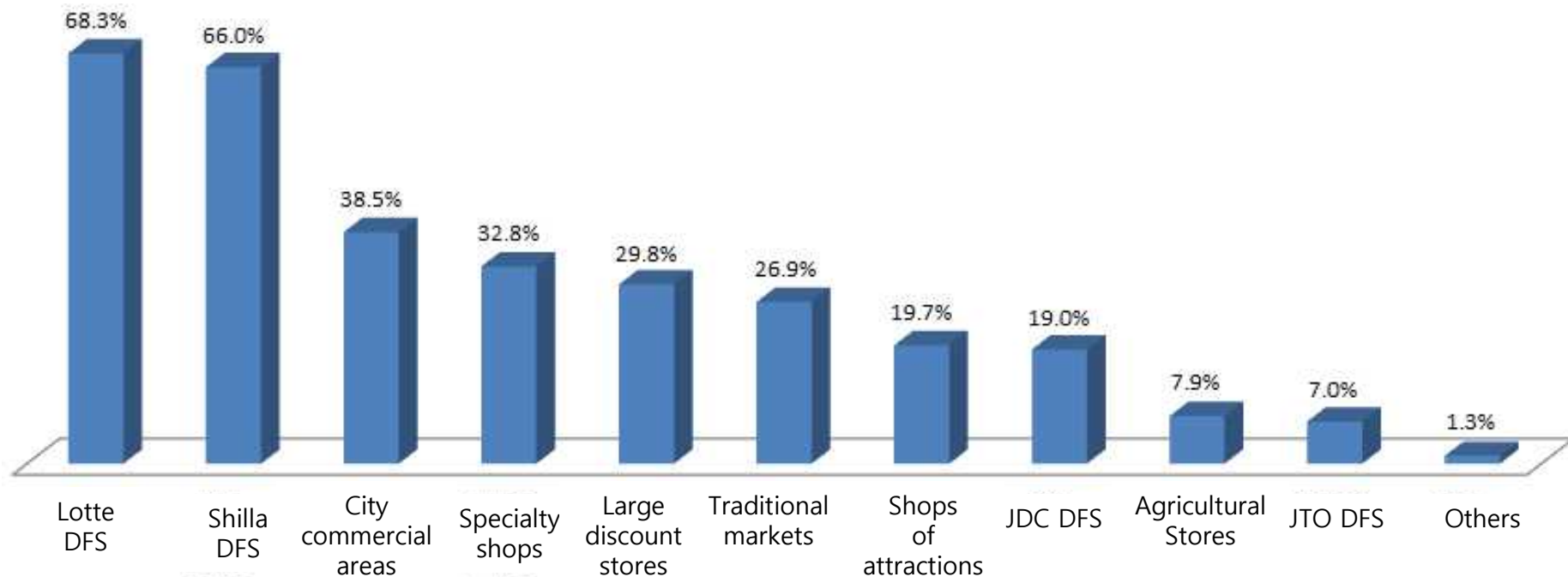
Rank	2014	2015	2016
1	Foods (14.6)	Cosmetics (19.4)	Cosmetics (73.6)
2	Cosmetics (14.2)	Foods (14.1)	Foods (56.3)
3	Chocolate (12.2)	Chocolate (11.1)	Cookies or snacks (40.4)
4	Cookies or snacks (11.0)	Cookies or snacks (10.0)	Chocolate (38.4)
5	Souvenirs (9.8)	Souvenirs (6.7)	Souvenirs (30.7)
6	Fruit (8.5)	Fruit (6.4)	Fruit (26.4)
7	Health supplements (5.8)	Health supplements (6.2)	Health supplements (24.6)
8	Clothes (4.9)	Tobacco (5.5)	Clothes (21.0)
9	Liquor (4.4)	Clothes (5.3)	Fashion accessories (20.1)
10	Tobacco (4.2)	Fashion accessories (5.3)	Tobacco (18.2)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

02 Data on the tourists' spending in Jeju

■ Places to shop

- The largest number of people preferred Lotte Duty Free Store (68.3% of the total feedback) as their place to shop.



02 Data on the tourists' spending in Jeju

■ Places to shop

- For the past three years, duty free stores have been steadily preferred as the places to shop. Overall preferences to shopping destinations are even.

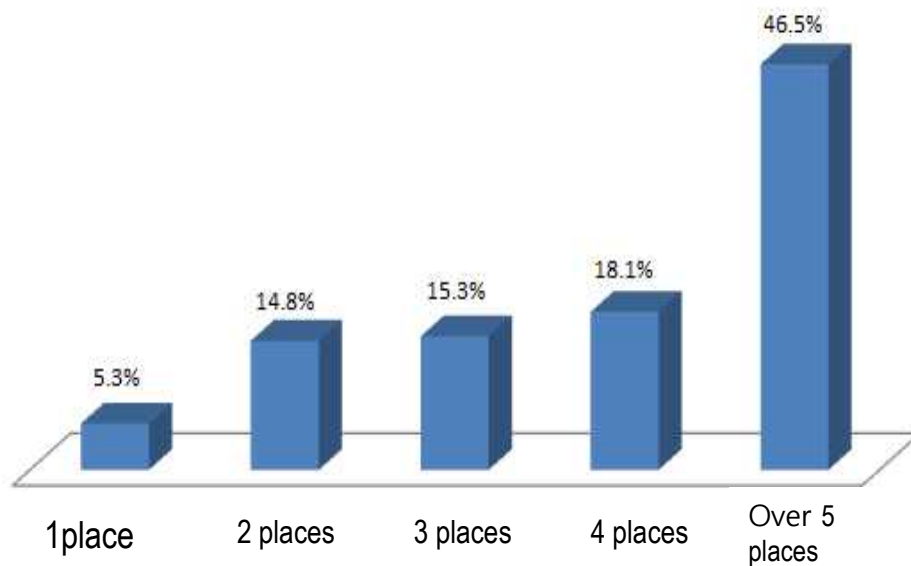
Rank	2014	2015	2016
1	Shilla Duty Free Store (15.2)	Shilla Duty Free Store (21.1)	Lotte Duty Free Store (68.3)
2	Lotte Duty Free Store (14.7)	Lotte Duty Free Store (20.6)	Shilla Duty Free Store (66.0)
3	Local specialty shops (13.5)	Downtown commercial areas (12.1)	Downtown commercial areas (38.5)
4	Downtown commercial areas (13.4)	Local specialty shops (12.1)	Local specialty shops (32.8)
5	Shops within attractions (11.8)	Large discount stores (9.5)	Large discount stores (29.8)
6	Traditional markets (9.8)	Traditional markets (8.3)	Traditional markets (26.9)
7	JDC Duty Free Store (8.8)	Shops within attractions (6.6)	Shops within attractions (19.7)
8	Large discount stores (7.4)	JDC Duty Free Store (5.6)	JDC Duty Free Store (19.0)
9	JTO Duty Free Store (2.9)	JTO Duty Free Store (2.1)	Agricultural food stores (7.9)
10	Agricultural food stores (1.9)	Agricultural food stores (1.7)	JTO Duty Free Store (7.0)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

02 Data on the tourists' spending in Jeju

■ The number of places to shop for package travelers

- The largest number of package tourists (46.5%) answered that they visit more than 5 places to shop.



Classification	2014	2015	2016
1 place	13.2	8.5	5.3
2 places	21.3	11.6	14.8
3 places	24.6	20.9	15.3
4 places	19.0	16.2	18.1
Over 5 places	21.8	42.8	46.5

03 Evaluation on tours in Jeju

Reasons why tourists are dissatisfied with tours in Jeju

- Main reasons of dissatisfaction was communication barriers, high prices, Food not favored, and inconvenient transportation.

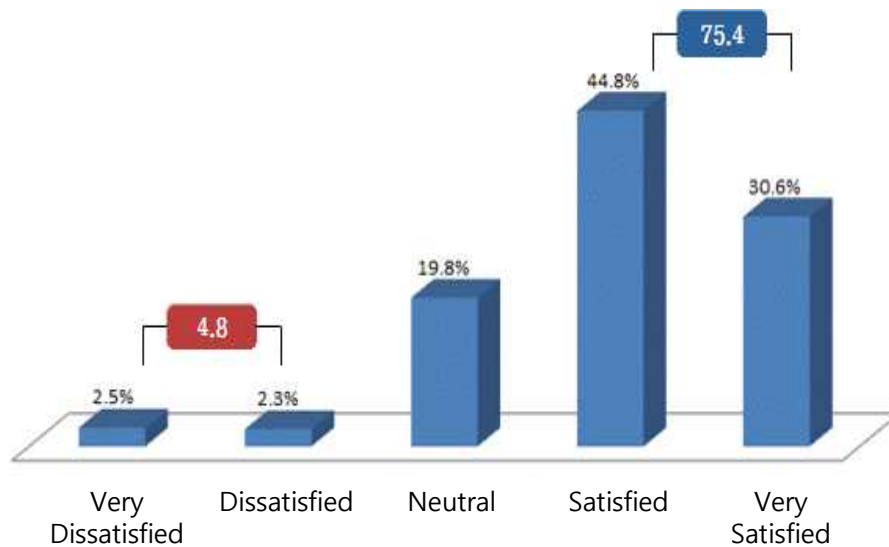
Classification	2014	2015	2016
1 st	Communication barriers (31.0)	Communication barriers (34.9)	Communication barriers (46.4)
2 nd	Expensive prices (19.3)	Expensive prices (25.9)	Expensive prices (41.9)
3 rd	Food not favored (15.0)	Food not favored (19.0)	Food not favored (28.3)
4 th	Difficulties in information collection (6.7)	Inconvenient transportation(10.2)	Inconvenient transportation(14.3)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

03 Evaluation on tours in Jeju

■ Immigration process

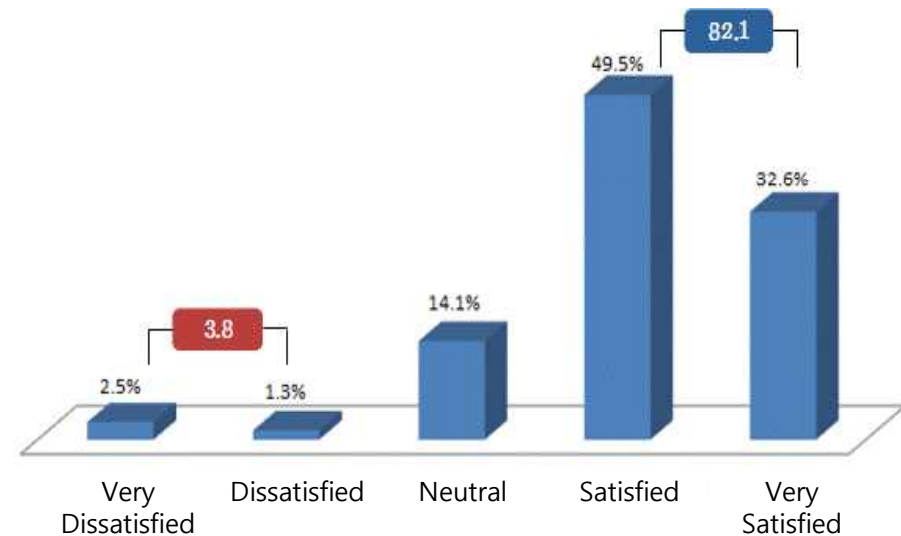
- The satisfaction score: 3.99



Classification	2014	2015	2016
Average	3.68	3.81	3.99

■ Accessibility to Jeju (after arrival in Korea)

- The satisfaction score: 4.09

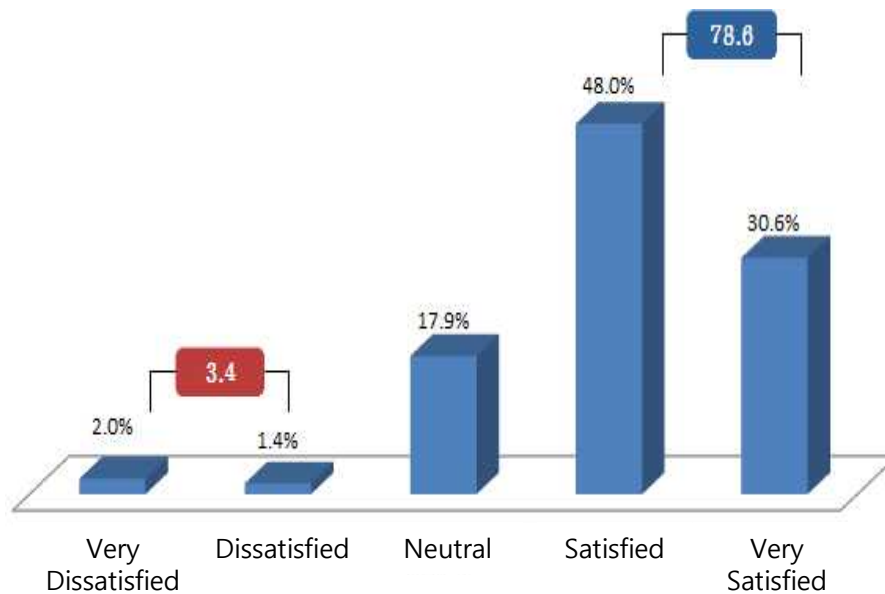


Classification	2014	2015	2016
Average	3.89	4.08	4.09

03 Evaluation on tours in Jeju

Facilities and services of airports and ports

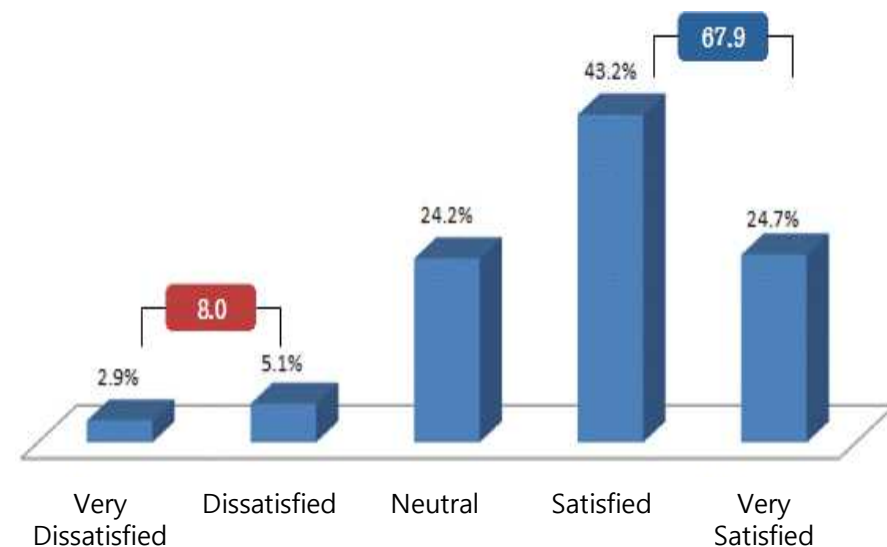
- The satisfaction score: 4.04



Classification	2014	2015	2016
Average	3.96	4.03	4.04

Public transportation

- The satisfaction score: 3.82

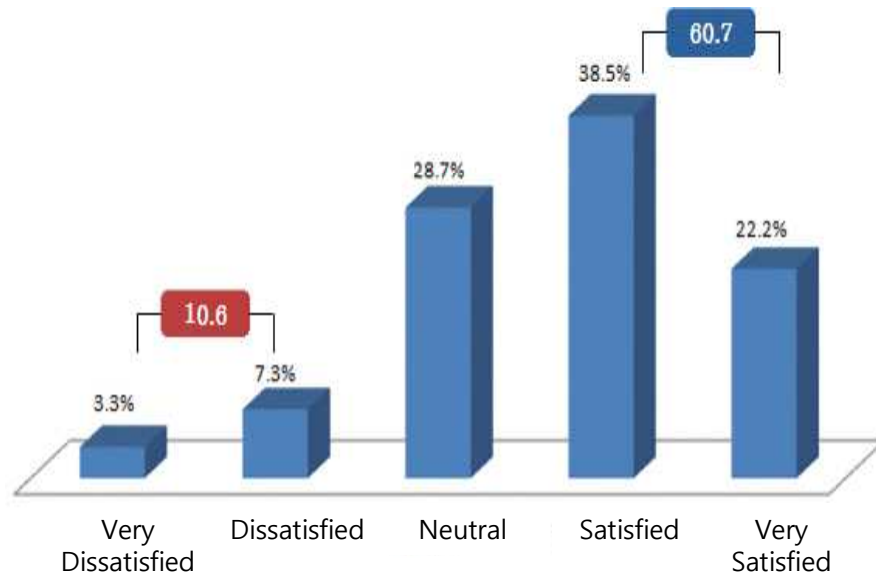


Classification	2014	2015	2016
Average	3.51	3.79	3.82

03 Evaluation on tours in Jeju

■ Traffic signs

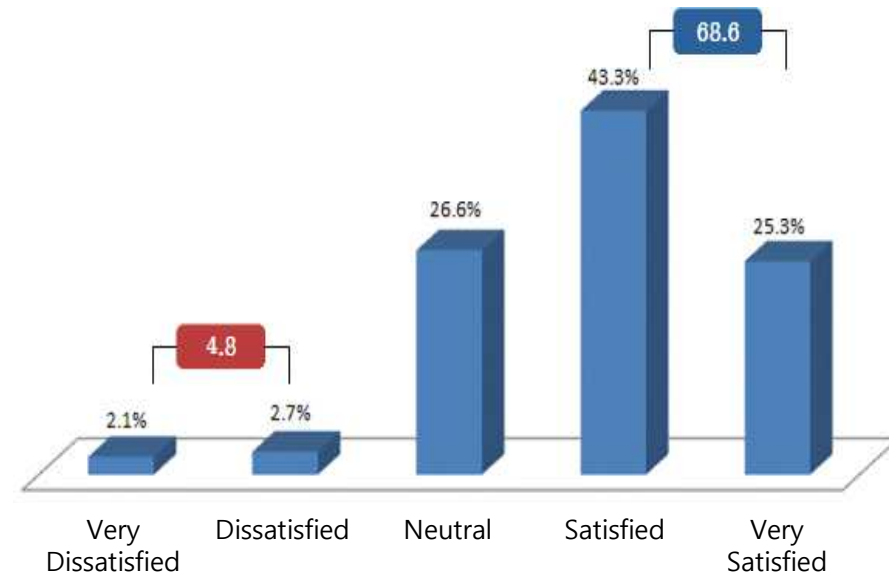
- The satisfaction score: 3.69



Classification	2014	2015	2016
Average	3.46	3.62	3.69

■ Process and services for money exchange

- The satisfaction score: 3.87

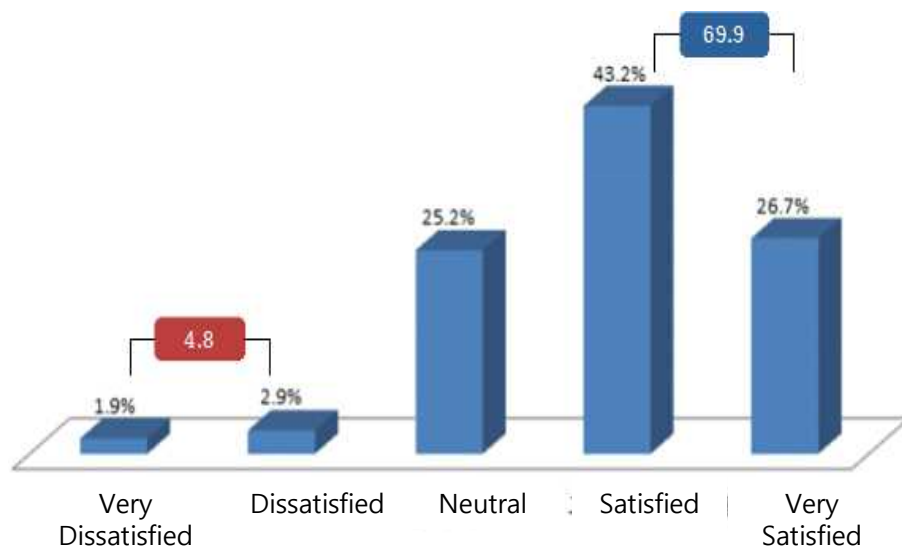


Classification	2014	2015	2016
Average	3.41	3.89	3.87

03 Evaluation on tours in Jeju

■ Spectacles and entertainments

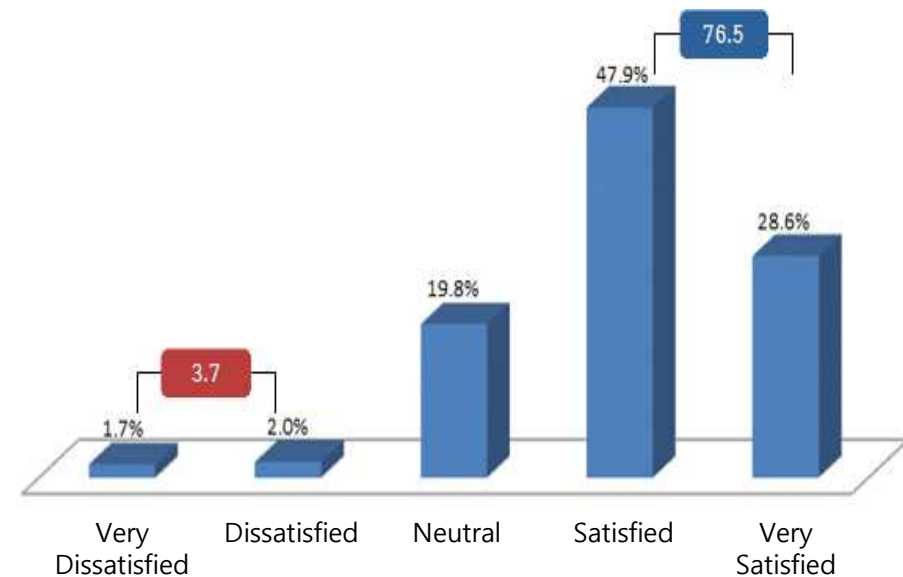
- The satisfaction score: 3.90



Classification	2014	2015	2016
Average	3.73	3.89	3.90

■ Tourist Attractions

- The satisfaction score: 4.00

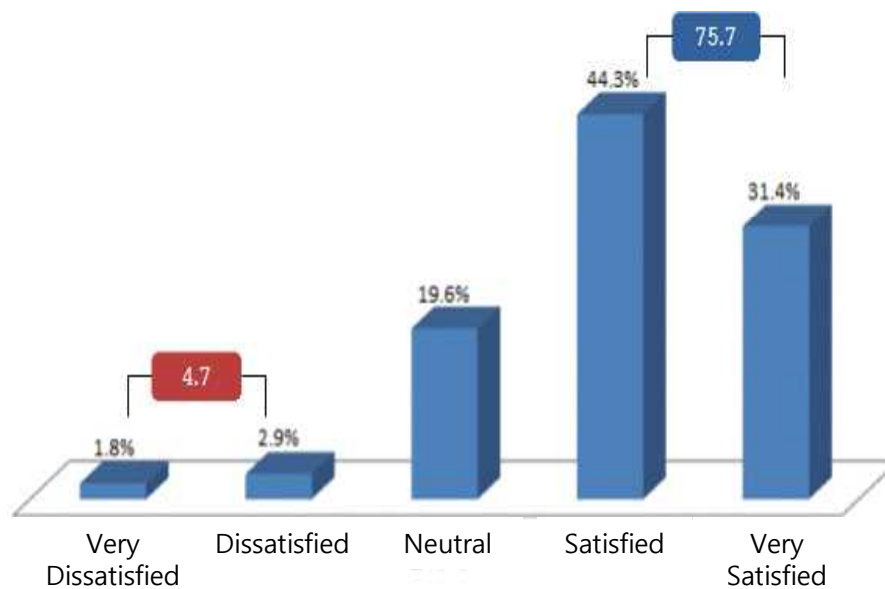


Classification	2014	2015	2016
Average	3.88	4.00	4.00

03 Evaluation on tours in Jeju

■ Accommodations

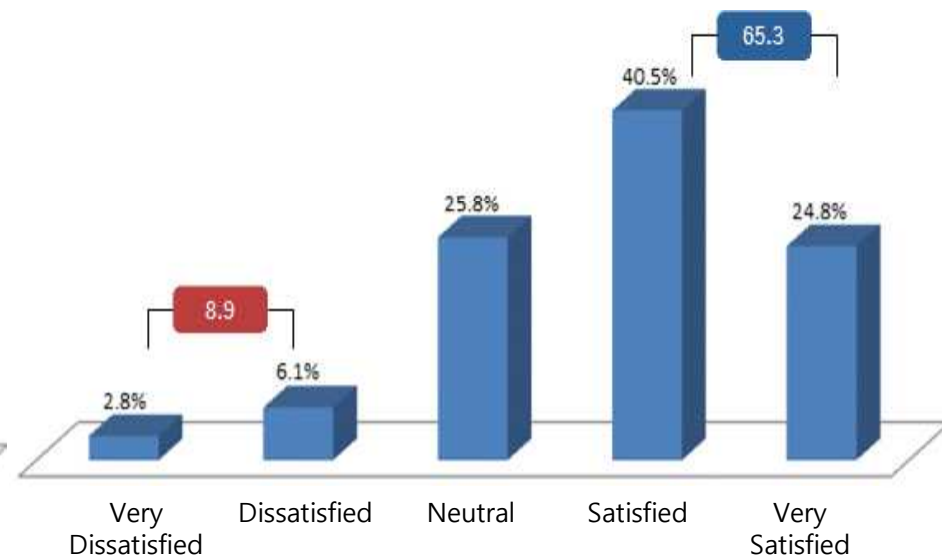
- The satisfaction score: 4.01



Classification	2014	2015	2016
Average	3.79	3.98	4.01

■ Level of satisfaction on food

- The satisfaction score: 3.79

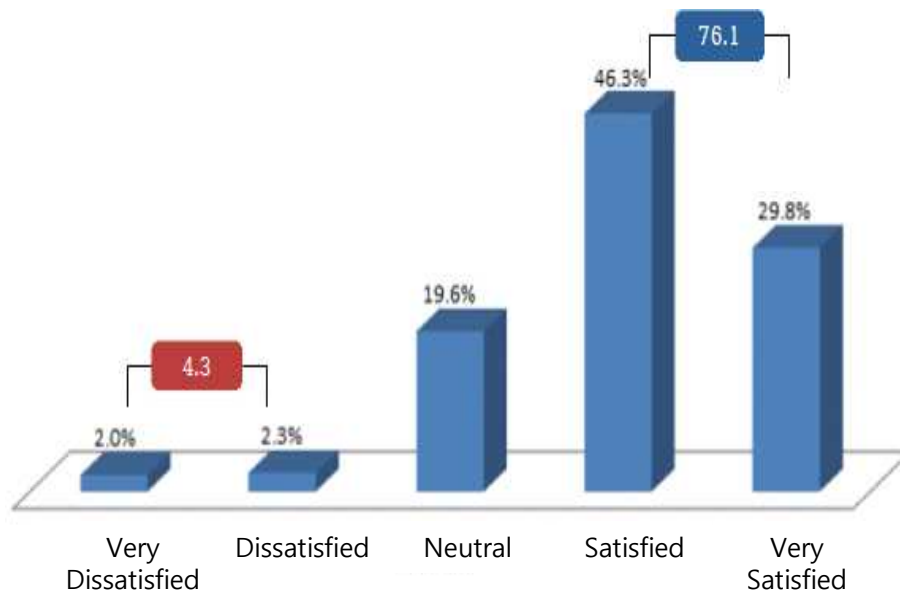


Classification	2014	2015	2016
Average	3.65	3.80	3.79

03 Evaluation on tours in Jeju

Rental car and charter bus

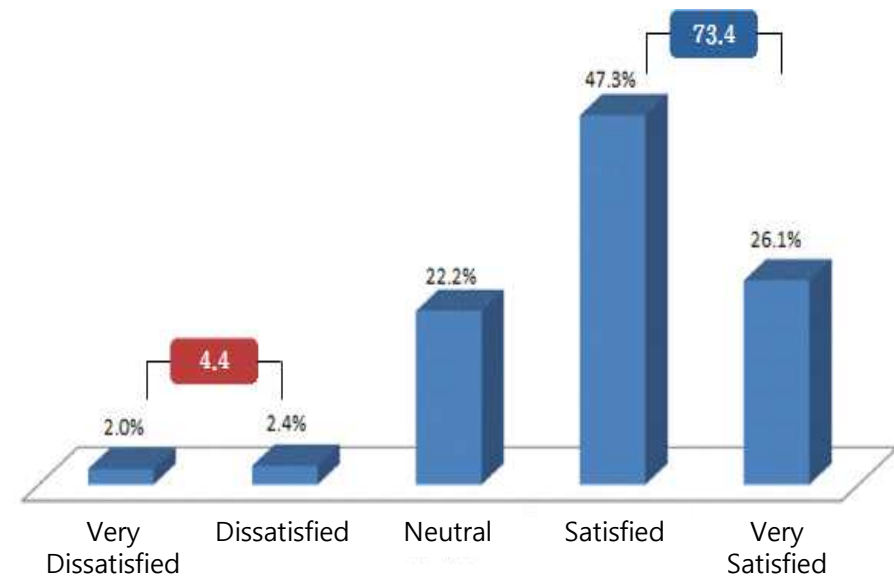
- The satisfaction score: 4.00



Classification	2014	2015	2016
Average	3.74	4.02	4.00

Level of satisfaction on shopping

- The satisfaction score: 3.98

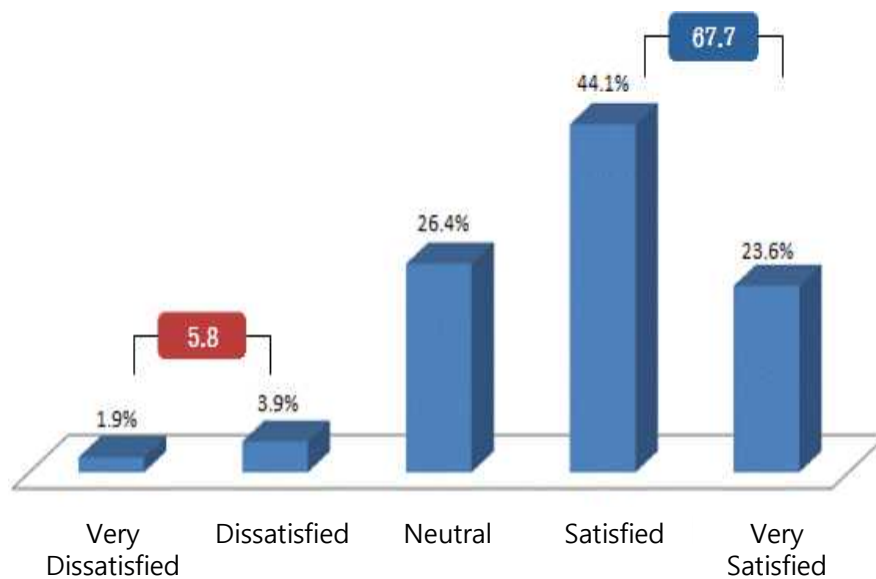


Classification	2014	2015	2016
Average	3.73	3.98	3.93

03 Evaluation on tours in Jeju

Travel cost

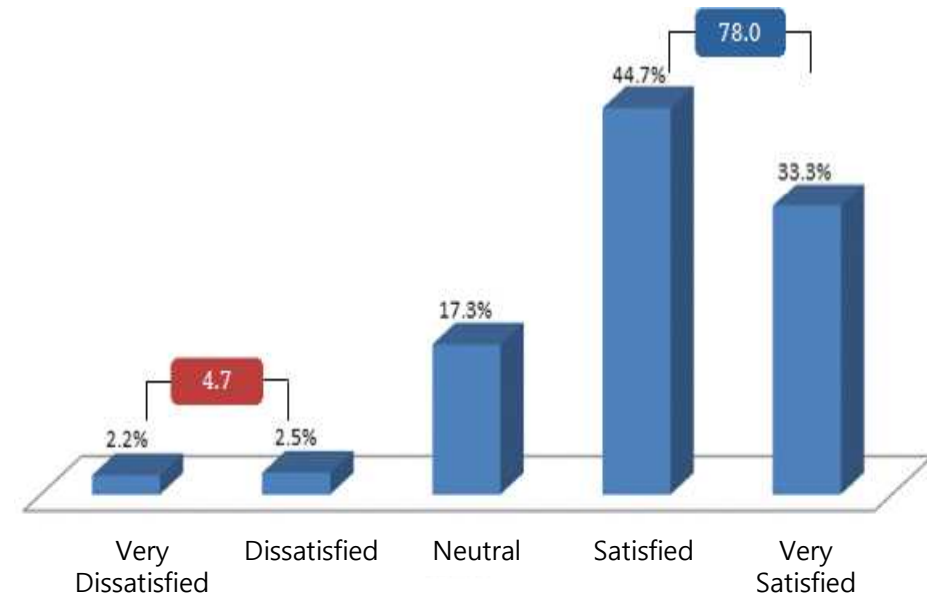
- The satisfaction score: 3.84



Classification	2014	2015	2016
Average	3.70	3.89	3.84

Kindness of residents

- The satisfaction score: 4.04

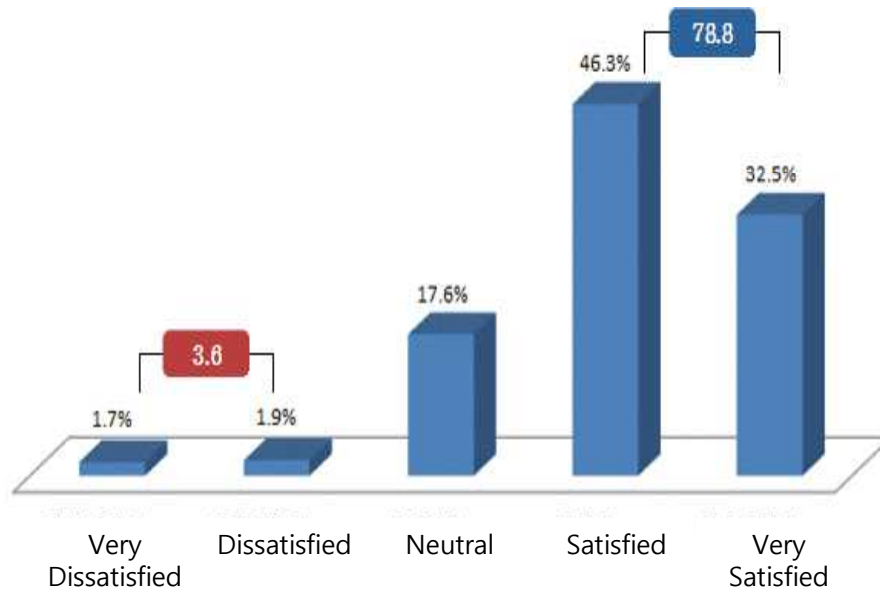


Classification	2014	2015	2016
Average	3.93	4.10	4.04

03 Evaluation on tours in Jeju

Kindness of staff at attractions

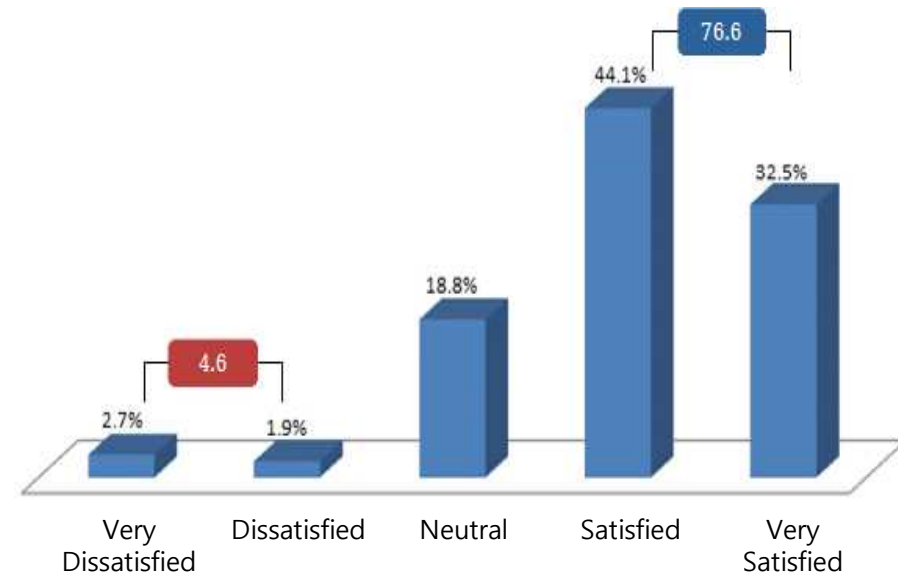
- The satisfaction score: 4.06



Classification	2014	2015	2016
Average	3.99	4.10	4.06

Service of tour guides

- The satisfaction score: 4.02

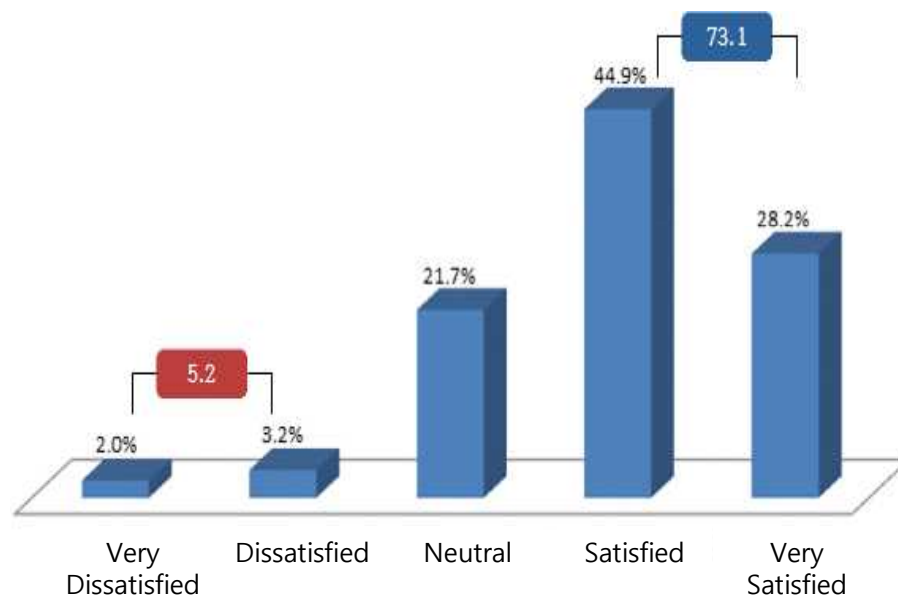


Classification	2014	2015	2016
Average	4.04	4.07	4.02

03 Evaluation on tours in Jeju

Guidance on tour information

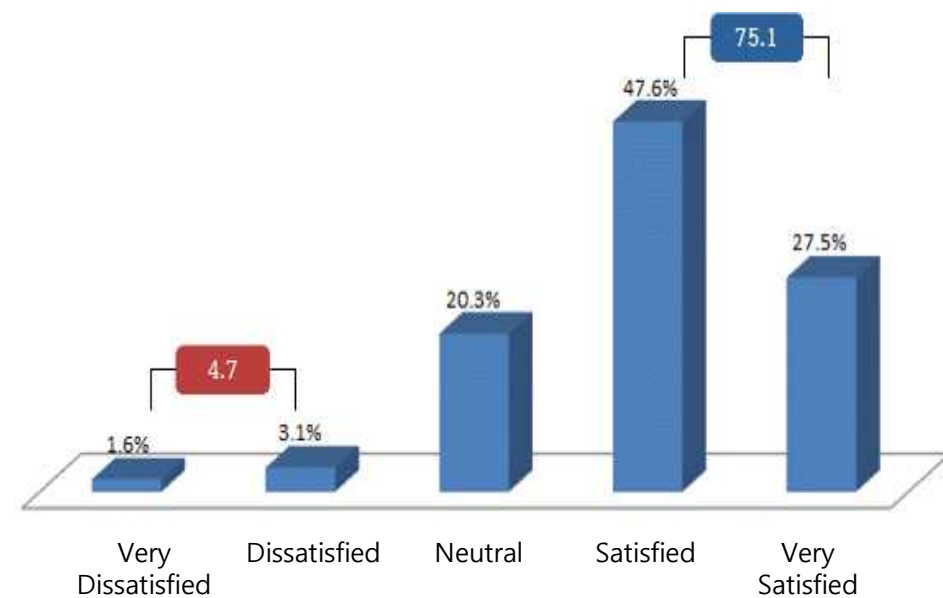
- The satisfaction score: 3.94



Classification	2014	2015	2016
Average	3.84	3.97	3.94

Tour guide map

- The satisfaction score: 3.97

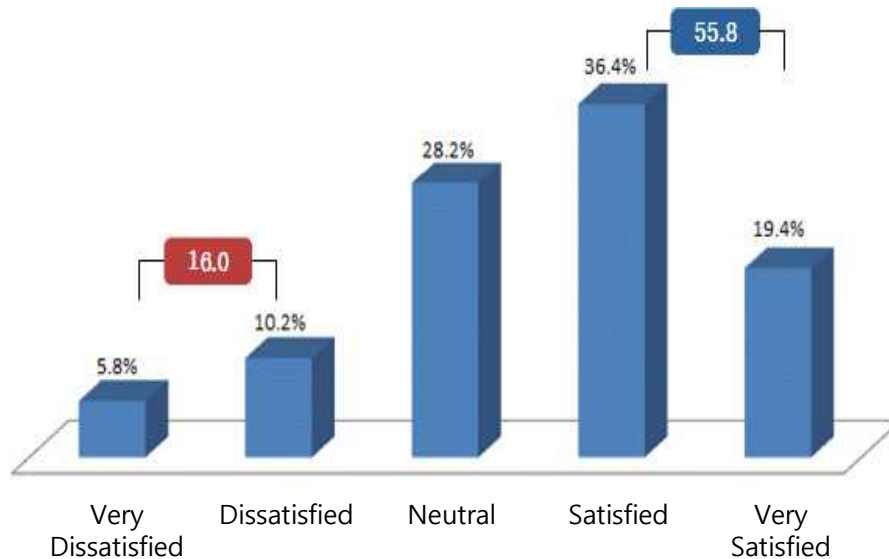


Classification	2014	2015	2016
Average	3.67	3.92	3.97

03 Evaluation on tours in Jeju

■ Communication

- The satisfaction score: 3.53

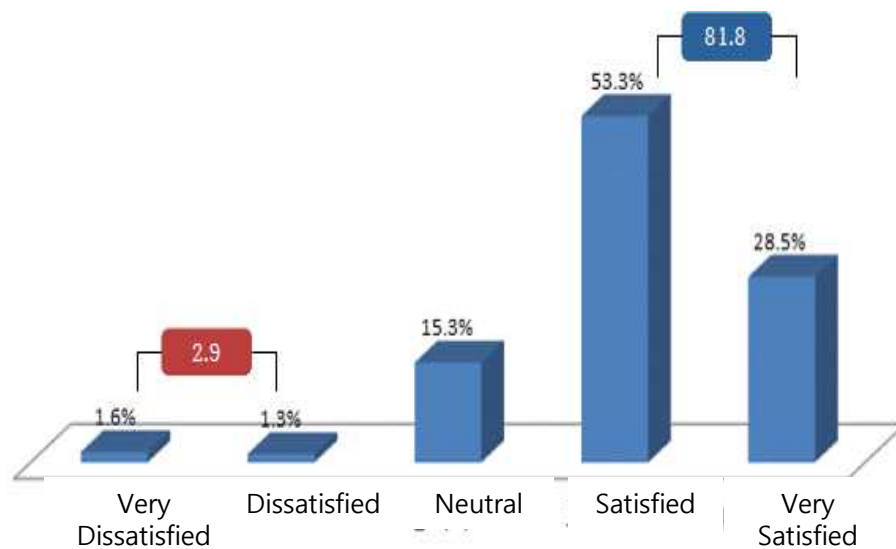


Classification	2014	2015	2016
Average	3.37	3.46	3.53

03 Evaluation on tours in Jeju

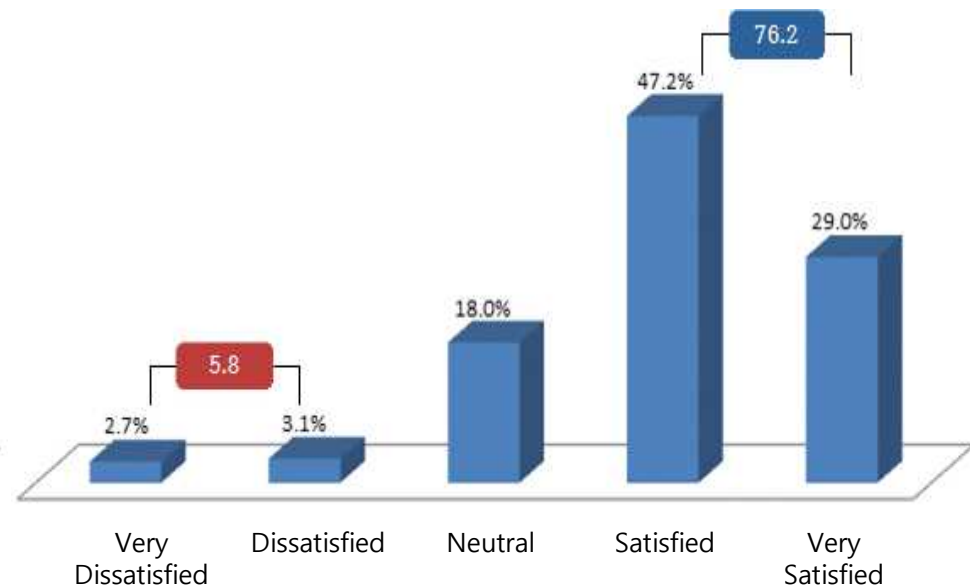
■ Level of satisfaction on the overall tour experience in Jeju

- The satisfaction score: 4.06



■ Willingness to re-visit Jeju

- The satisfaction score: 3.97



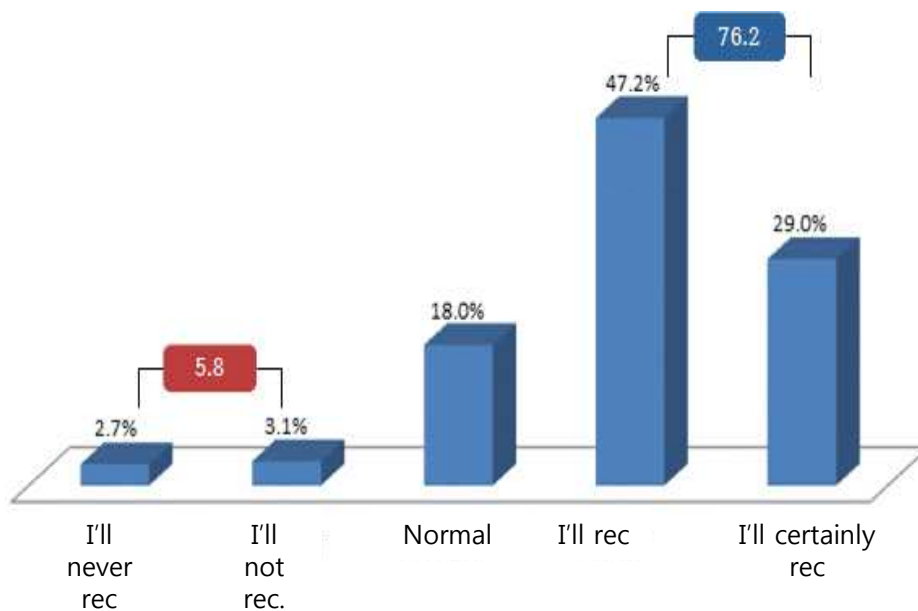
Classification	2014	2015	2016
Average	3.94	4.10	4.06

Classification	2014	2015	2016
Average	3.83	3.97	3.97

03 Evaluation on tours in Jeju

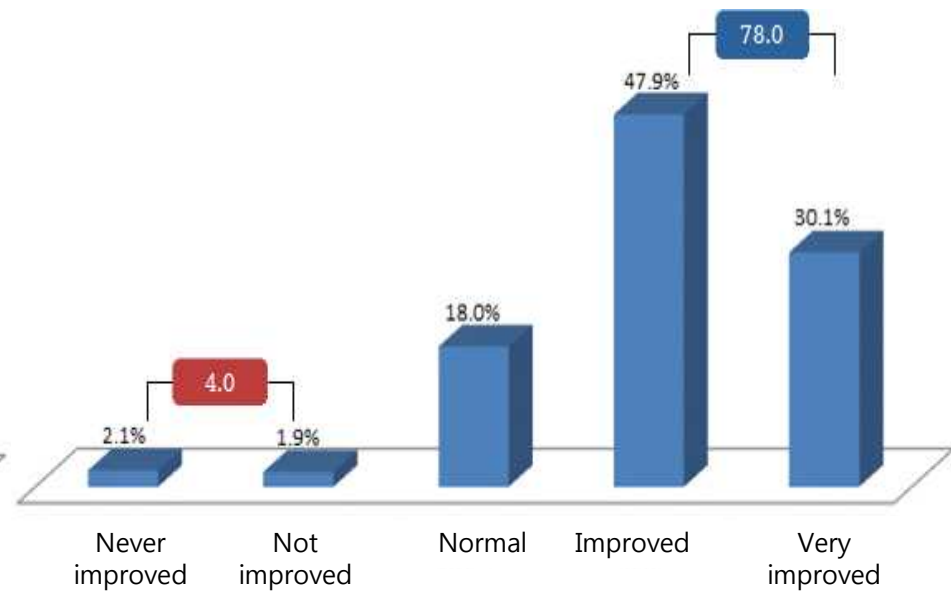
■ Willingness to recommend Jeju to others

- The satisfaction score: 4.04



■ Image improvement on Jeju

- Image improvement score: 4.02



Classification	2014	2015	2016
Average	3.90	4.07	4.04

Classification	2014	2015	2016
Average	3.89	4.06	4.02

Chapter 4

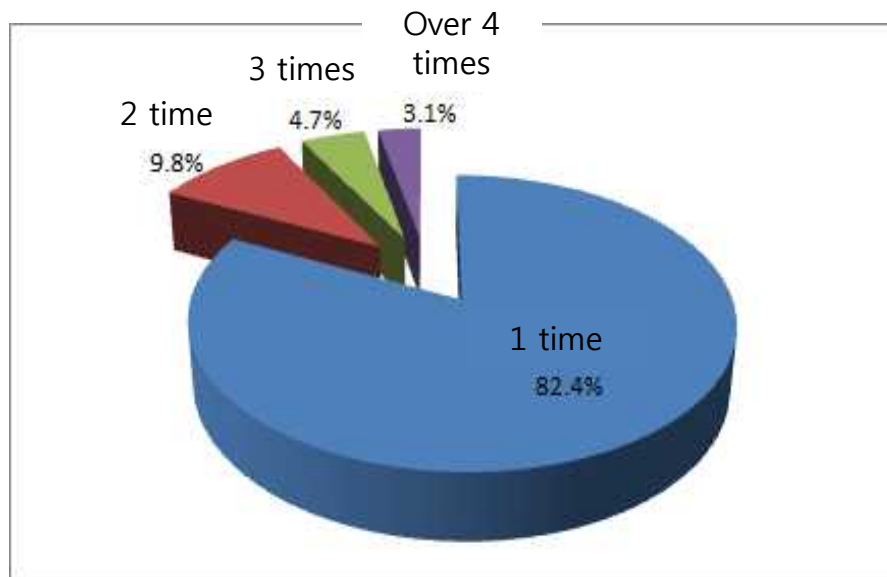
Survey Results on the Cruise Tourists

- 01. Data on the travels in Jeju**
- 02. Data on the tourists' spending in Jeju**
- 03. Evaluation on tours in Jeju**

01 Data on the travels in Jeju

Frequency of cruise travels

- One time cruise travel accounted for 82.4%, the highest portion of travel frequency to Jeju

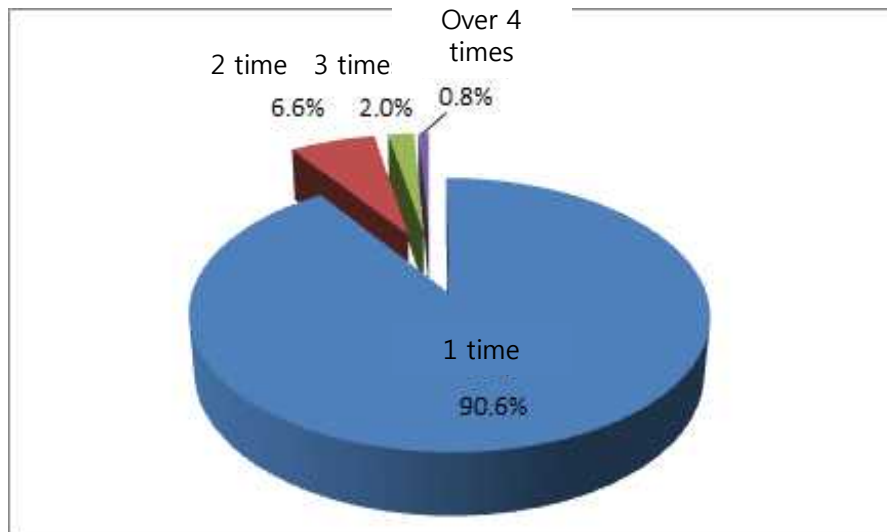


Classification	2014	2015	2016
One time	70.0	75.2	82.4
Visit twice	13.9	10.1	9.8
Visit three times	4.8	4.7	4.7
Visit more than four times	11.3	9.9	3.1

01 Data on the travels in Jeju

Frequency of visits to Jeju

- The average number of visits to Jeju was 1.14.

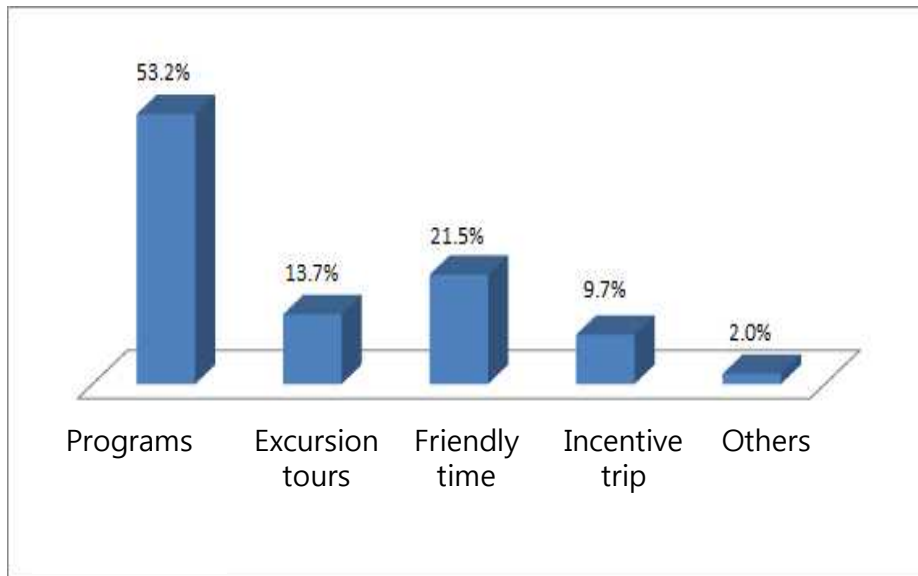


Classification	2014	2015	2016
Average	1.43 times	1.37 times	1.14 times
One time	82.7	85.8	90.6
Visit twice	11.0	7.9	6.6
Visit three times	1.8	2.2	2.0
Visit more than four times	4.5	4.1	0.8

01 Data on the travels in Jeju

■ Purpose of cruise travels

- The largest number of people (53.2% of the total feedback) selected the program and unique experiences of cruise travel as their purpose of tour.

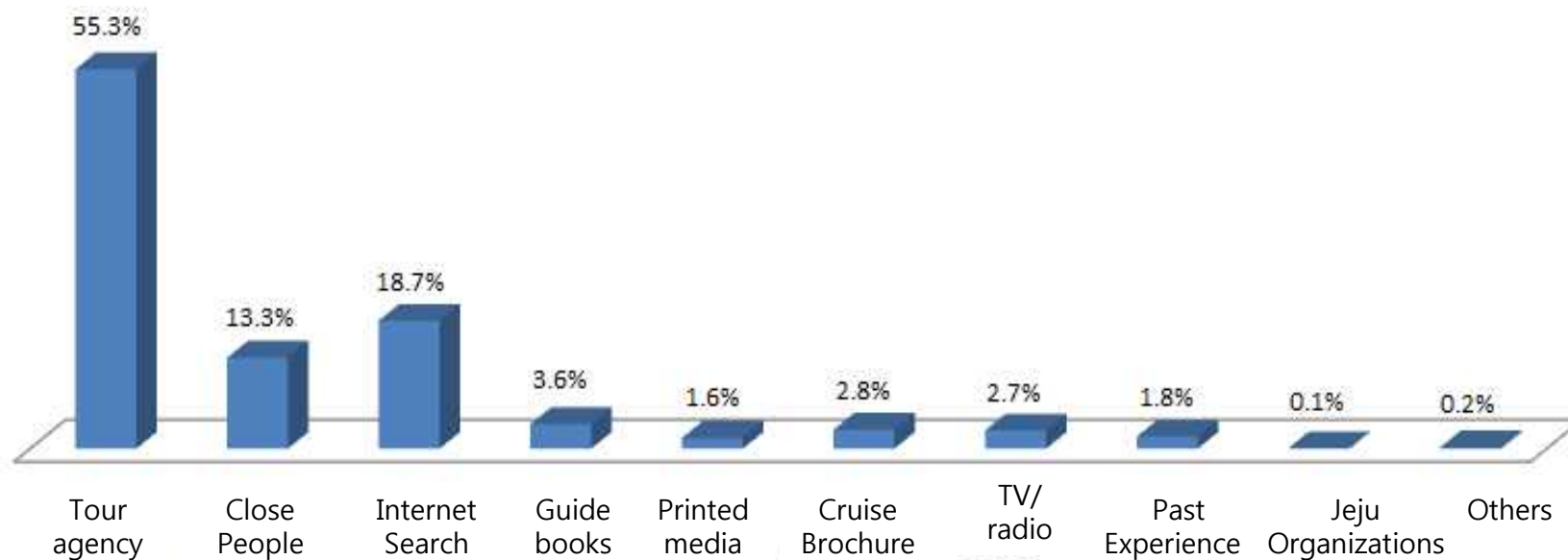


Classification	2014	2015
Programs and unique experiences of cruise tours	52.5	53.2
Shore excursion tours	12.7	13.7
Friendly time with family or lovers	17.0	21.5
As incentive trip from workplace	11.1	9.7
Others	6.8	2.0

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

- The largest number of people (57.7% of the total respondents) collected their tour information by online search.



※Options of "Organizations within Jeju such as provincial government, Jeju Tourism Organization, and Jeju Tourism Association" were added for the 2016 survey.

01 Data on the travels in Jeju

■ Route for tour information (knowledge) collection

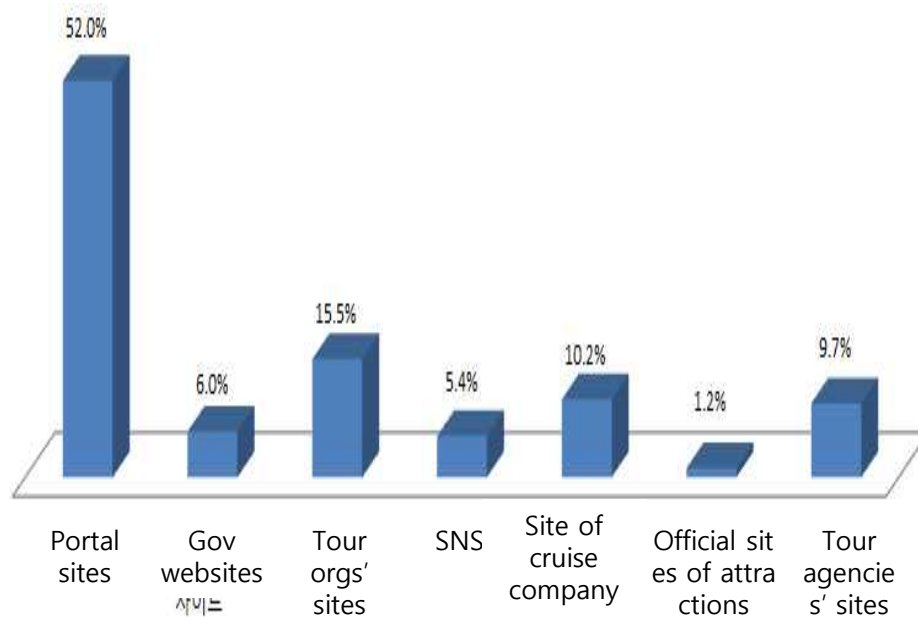
- For the past three years, gradually more people get information from tour agencies

Rank	2014	2015	2016
1	Tour agency (53.1)	Tour agency (53.5)	Tour agency (55.3)
2	Relatives, friends, or colleagues (15.7)	Internet search(19.1)	Internet search(18.7)
3	Internet search(14.6)	Relatives, friends, or colleagues(13.3)	Relatives, friends, or colleagues(13.3)
4	Brochure from cruise companies(6.9)	Tour guide books (4.0)	Tour guide books(3.6)
5	Tour guide books (4.5)	Brochure from cruise companies(3.2)	Brochure from cruise companies(2.8)

01 Data on the travels in Jeju

Route for tour information (knowledge) collection

- The largest number of people (52.0% of the total respondents) selected portal sites as their main source of online information collection.

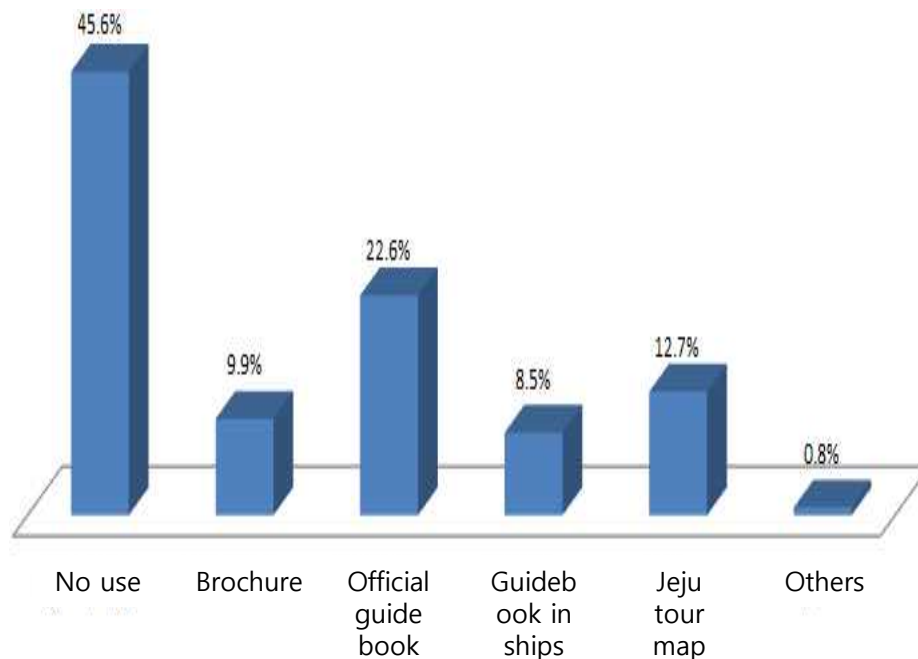


Ra nk	2014	2015	2016
1	Portal sites (65.7)	Portal sites (67.2)	Portal sites (52.0)
2	Tourism related organizations' sites (13.5)	Tourism related organizations' sites (14.9)	Tourism related organizations' sites (15.5)
3	Websites of cruise companies(11.6)	SNS (6.2)	Websites of cruise companies(10.2)
4	Sites of government(4.1)	Tour agencies' sites(5.8)	Tour agencies' sites(9.7)
5	SNS (3.4)	Websites of cruise companies(2.9)	SNS (5.4)

01 Data on the travels in Jeju

■ Tour information travelers used after arrival in Jeju

- The largest number of people (45.6% of the total respondents) answered that they didn't use any information once they arrived in Jeju.

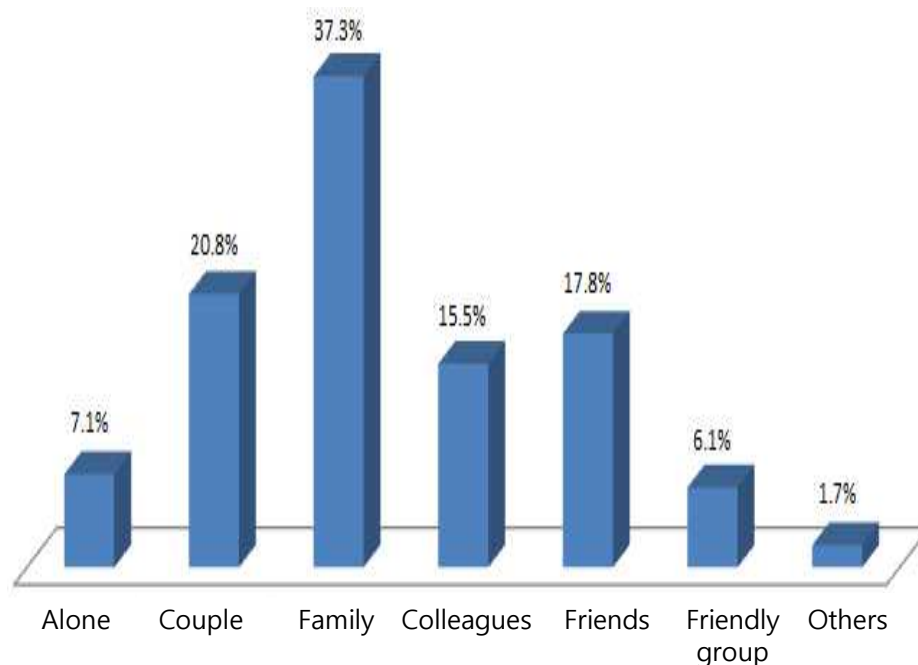


Classification	2015	2016
Didn't use information	34.1	45.6
Brochure of each tourist attractions	10.8	9.9
Official guide book on Jeju	21.5	22.6
Tour guidebook placed in the ships	13.5	8.5
Jeju tour map	9.4	12.7
Others	3.0	0.8

01 Data on the travels in Jeju

■ Type of companions

- Family members or relatives (37.3%) were the most preferred companions for tours.



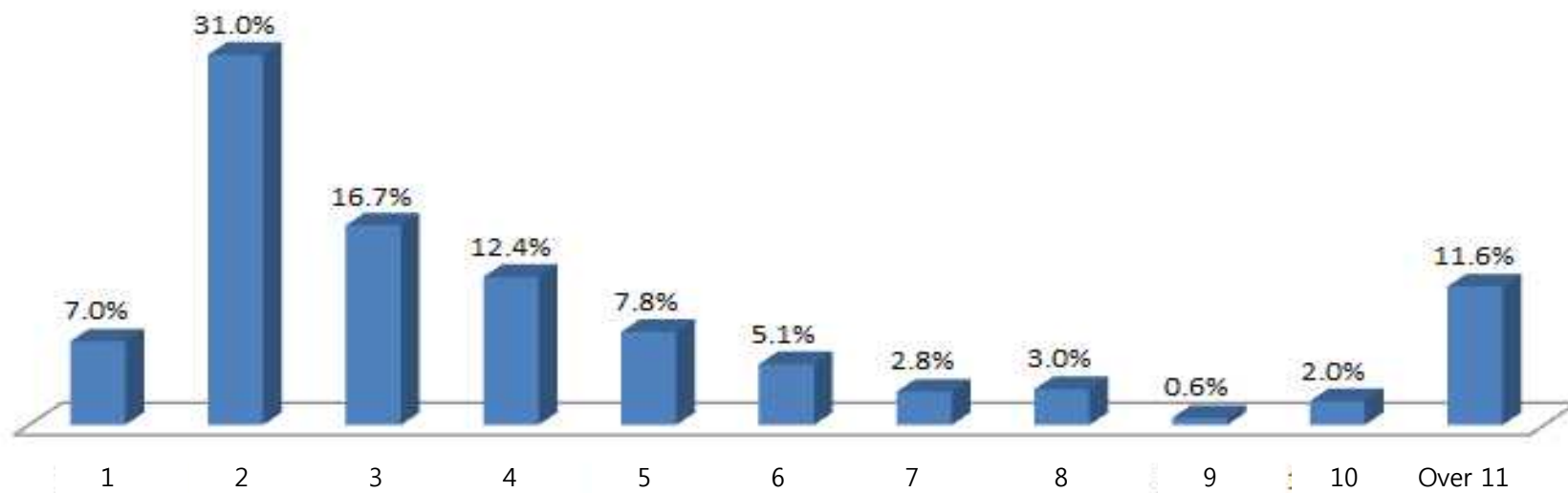
Classification	2014	2015	2016
Alone	10.4	6.2	7.1
Married couple or Lovers	21.5	18.8	20.8
Family members or relatives	25.4	40.6	37.3
Colleagues	23.5	15.3	15.5
Friends	13.9	14.5	17.8
Members of friendly communities	4.4	3.3	6.1
Others	0.9	1.3	1.7

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

01 Data on the travels in Jeju

■ Number of companions

- The average number of companions was 5.48.

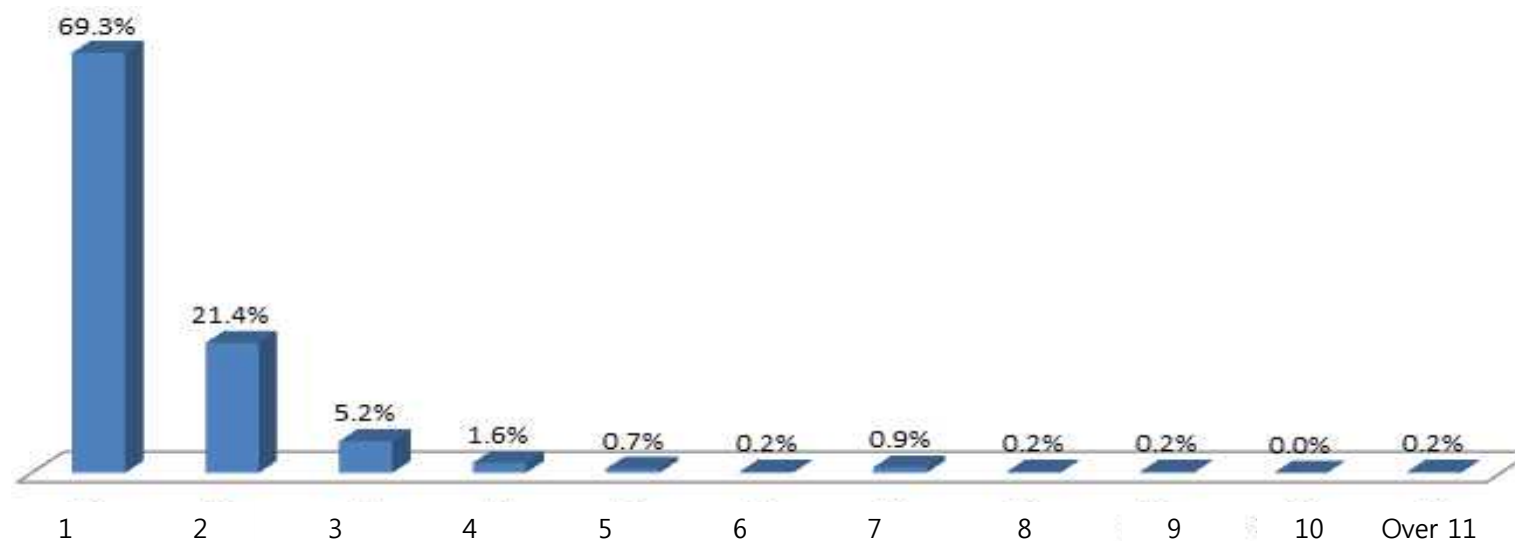


Classification	2014	2015	2016
Average no. of companions	5.89	5.65	5.48

01 Data on the travels in Jeju

■ Number of companions under the age of 15

- The average number of companions under the age of 15 was 1.43.

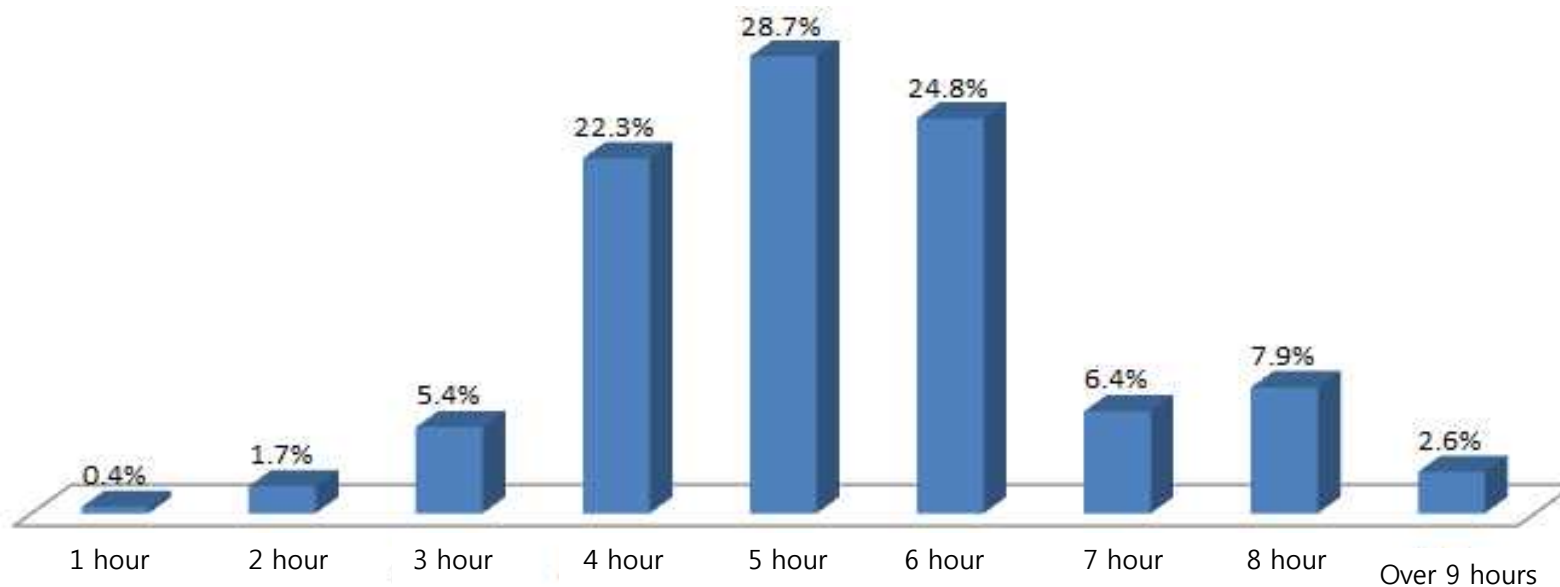


※ This option was newly added from the 2016 survey.

01 Data on the travels in Jeju

■ Time spent for tours in Jeju

- The average time spent for tours in Jeju was 5.55 hours.



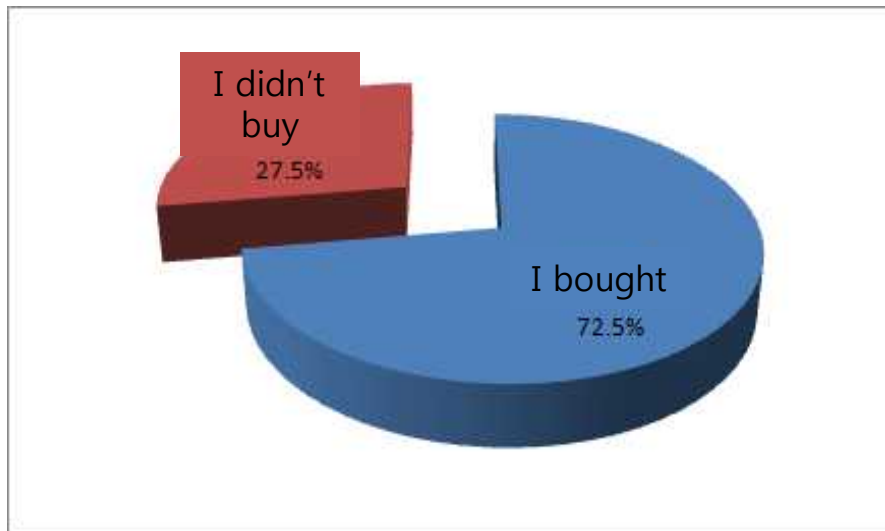
Classification	2014	2015	2016
Average	7.12	5.94	5.55

※ The data on time spent for tours in Jeju only reflected feedbacks on the survey which may be different from the actual schedule of ship's arrival and departure.

01 Data on the travels in Jeju

■ Whether you purchased any organized shore excursion tours.

- 72.5% of the cruise travelers purchased organized shore excursion tour products.

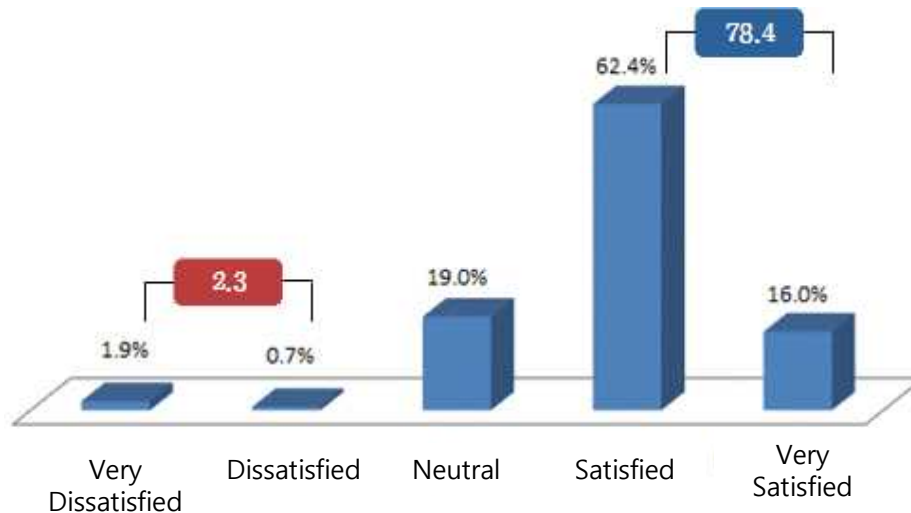


Classification	2014	2015	2016
I bought.	49.3	70.2	72.5
I didn't buy.	50.7	29.8	27.5

01 Data on the travels in Jeju

■ Level of satisfaction on the organized shore excursion tours

- Cruise travelers' satisfaction score on the organized shore excursions was 3.90.

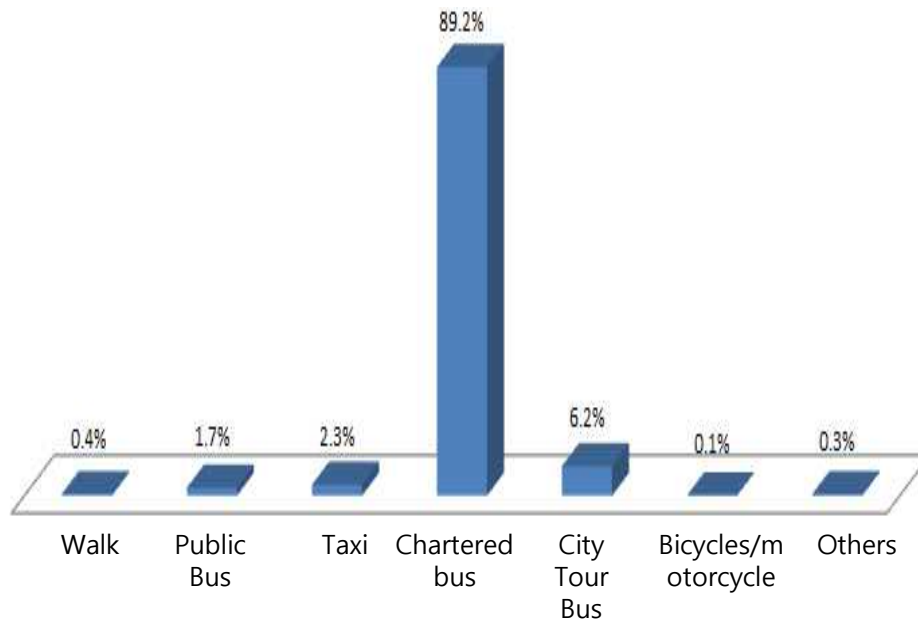


Classification	2014	2015	2016
Average	3.80	3.86	3.90

01 Data on the travels in Jeju

■ Main transportation

- The largest number of people (89.2% of the total respondents) selected charter buses as their main transportation.

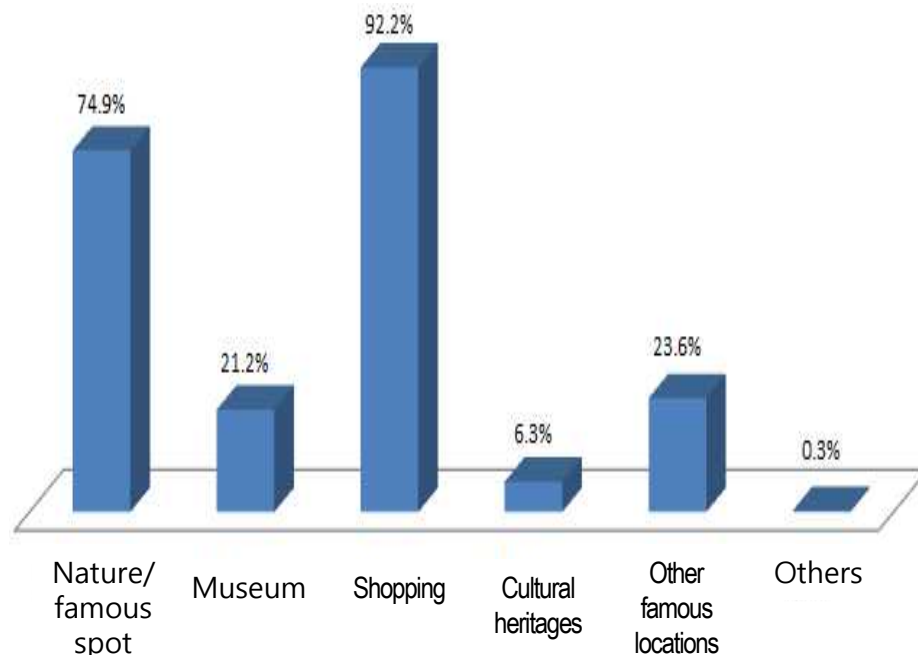


Rank	2014	2015	2016
1	A rental car with a tour guide or a chartered taxi(60.6)	Chartered bus(71.5)	Chartered bus(89.2)
2	Chartered bus(22.2)	City Tour Bus (14.0)	City Tour Bus(6.2)
3	Public transportation (bus, or taxi)(6.4)	Taxi(5.5)	Taxi(2.3)

01 Data on the travels in Jeju

■ Main destinations of tours in Jeju

- The largest number of people (92.2% of the total respondents) selected shopping as their main destinations during their tour in Jeju.



Rank	2014	2015	2016
1	Natural attractions(41.1)	Natural attractions (31.7)	Shopping (92.2)
2	Shopping (27.9)	Shopping (41.5)	Natural attractions (74.9)
3	Other famous locations (13.1)	Museums (11.7)	Other famous locations(23.6)
4	Museums (12.1)	Other famous locations(11.3)	Museums (21.2)
5	Cultural heritages (5.9)	Cultural heritages (3.8)	Cultural heritages (6.3)

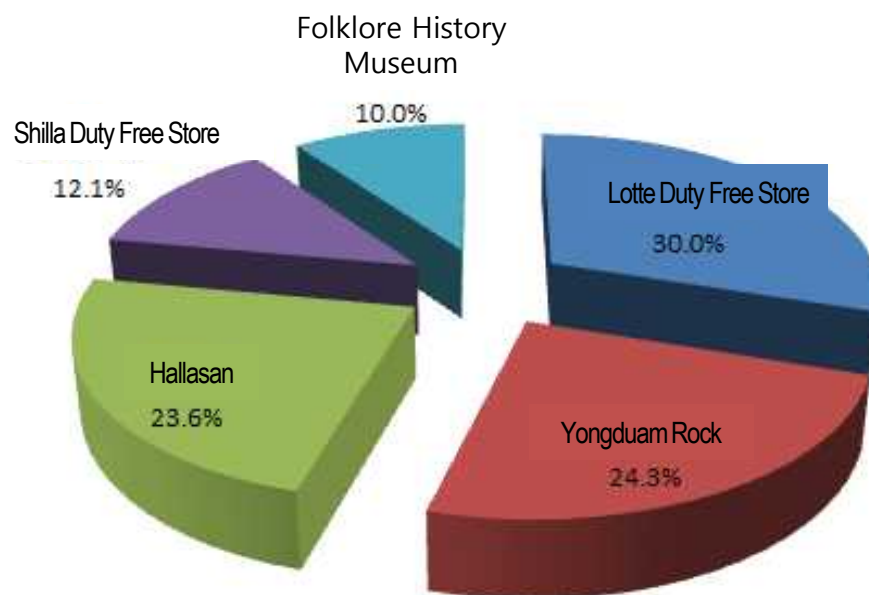
※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

※ In the 2016 survey, "Seogwipo Maeil Olle Market" was added as the option for Shopping.

01 Data on the travels in Jeju

■ Destinations tourists want to re-visit during their tour in Jeju

- Lotte Duty Free Store received the most responses (30.0% of the total feedbacks) as the destination tourists want to re-visit.

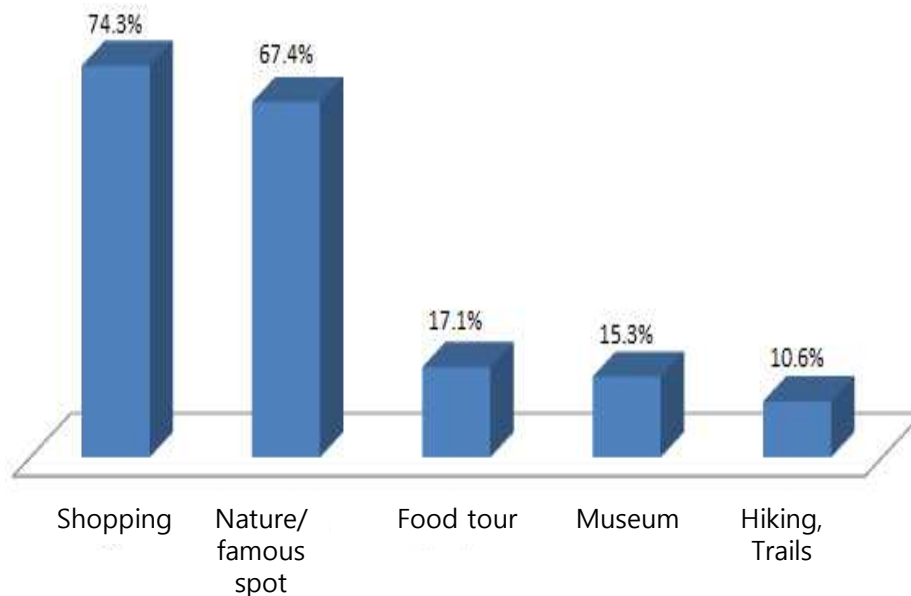


Rank	2014	2015	2016
1	Yongduam Rock (34.6)	Shilla Duty Free Store (18.4)	Lotte Duty Free Store (30.0)
2	Hallasan (17.7)	Hallasan (16.5)	Yongduam Rock(24.3)
3	Shilla Duty Free Store (10.8)	Yongduam Rock (12.2)	Hallasan(23.6)
4	Lotte Duty Free Store (6.7)	Lotte Duty Free Store (9.2)	Shilla Duty Free Store (12.1)
5	Seongsan Ilchulbong Peak (5.3)	Teddy Bear Museum(9.5)	Jeju Folklore & Natural History Museum(10.0)

01 Data on the travels in Jeju

■ Activities during Jeju tour

- The largest number of people (74.3% of the total respondents) selected shopping as their main activities during their tour in Jeju.



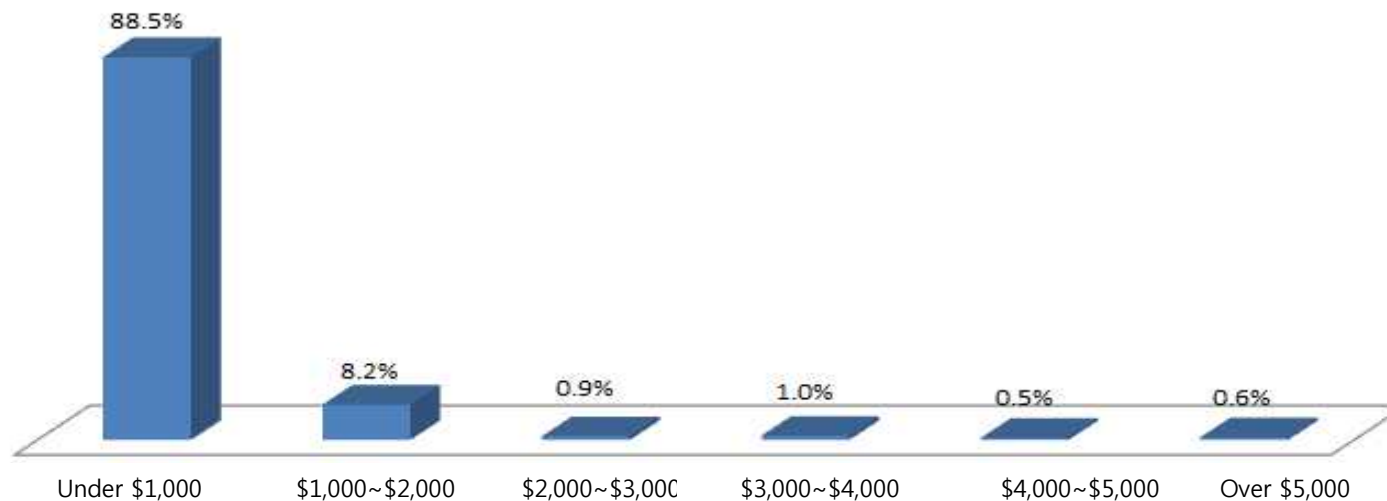
Rank	2014	2015	2016
1	Shopping (26.2)	Shopping (33.2)	Shopping (74.3)
2	Enjoying natural/famous scenery(24.7)	Enjoying natural/famous scenery(25.2)	Enjoying natural/famous scenery(67.4)
3	Walking tour (9.2)	Visiting museums or exhibitions(10.8)	Food tour (visiting good restaurants)(17.1)
4	Visiting museums or exhibitions(8.9)	Food tour (visiting good restaurants)(6.4)	Visiting museums or exhibitions(15.3)
5	Food tour (visiting good restaurants)(6.4)	Visiting theme parks(4.8)	Mountain/Oreum/ Olle Trail/Trekking(10.6)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

02 Data on the tourists' spending in Jeju

■ Data on the spending of travelers in Jeju

- Cruise tourists' average per capita spending was US\$491.9



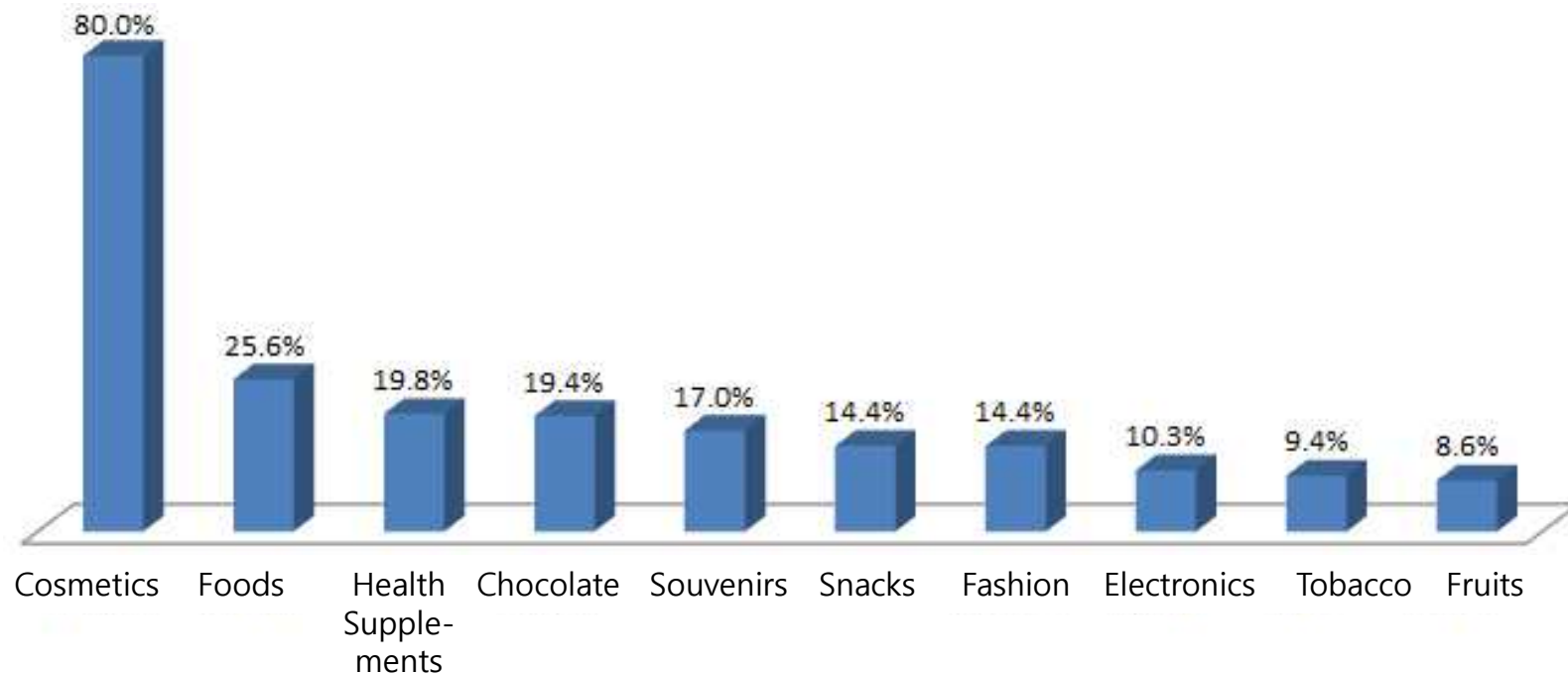
Classification	2014	2015	2016
Average	724.1 \$	802.1 \$	491.9 \$

※ When the amount was over US\$10,000, the data was excluded from the calculation for the average. But the respondent was included as the respondents whose per capita spending was over US\$5,000.

02 Data on the tourists' spending in Jeju

■ Main shopping items

- The largest number of people (80.0% of the total respondents) selected cosmetics as their main shopping item.



02 Data on the tourists' spending in Jeju

■ Main shopping items

- For the past three years, respondents have shown a steady preference for cosmetics and foods products. In 2016, the share of health supplements was high.

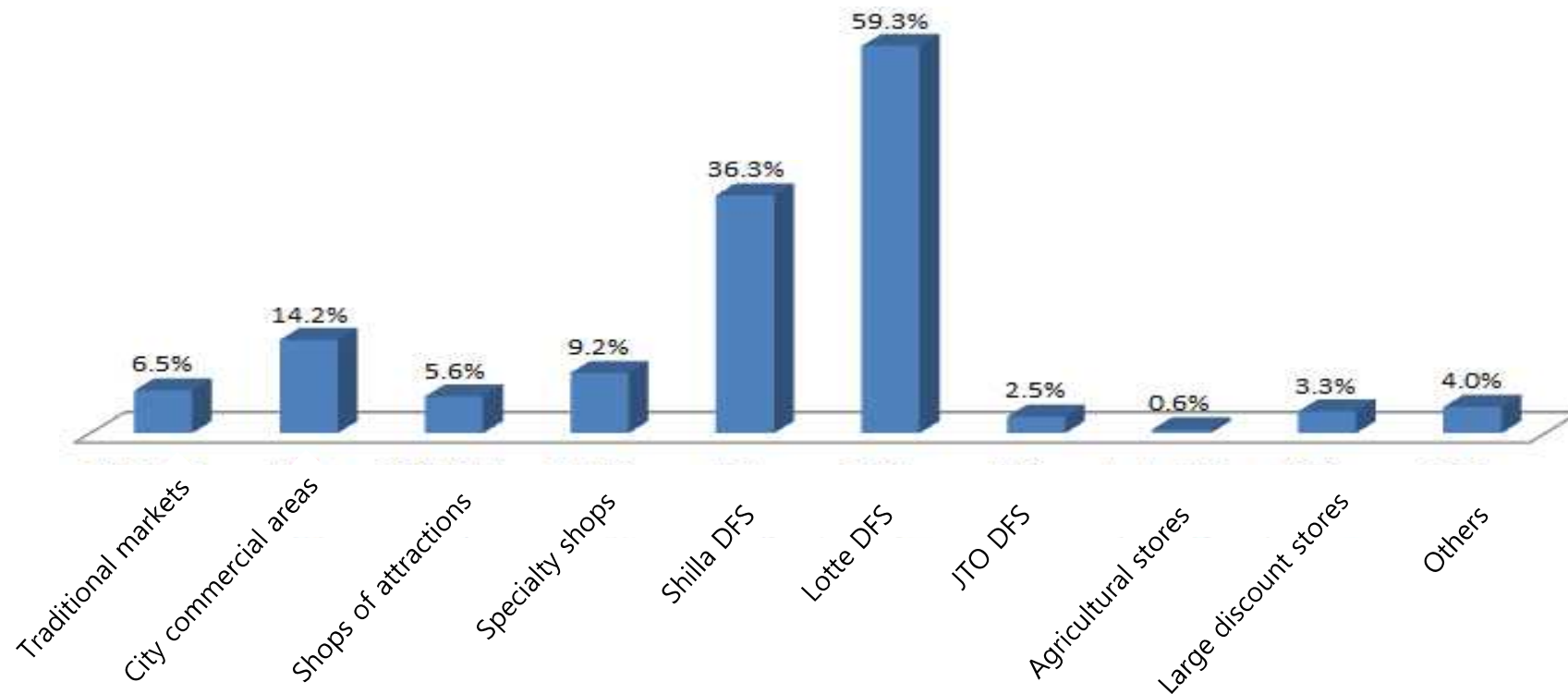
Rank	2014	2015	2016
1	Cosmetics (25.8)	Cosmetics (34.1)	Cosmetics (80.0)
2	Foods (17.7)	Foods (14.0)	Foods (25.6)
3	Cookies or snacks (9.6)	Chocolate (8.7)	Health supplements (19.8)
4	Clothes (8.4)	Fashion accessories (6.6)	Chocolate (19.4)
5	Souvenirs (7.3)	Tobacco (6.4)	Souvenirs (17.0)
6	Fashion accessories (5.5)	Cookies or snacks (6.1)	Cookies or snacks (14.4)
7	Jewelry or accessories (5.2)	Health supplements (5.2)	Fashion accessories (14.4)
8	Chocolate (5.2)	Souvenirs (5.1)	Electronics (10.3)
9	Health supplements (3.7)	Electronics (3.3)	Tobacco (9.4)
10	Tobacco (3.3)	Clothes (2.8)	Fruit (8.6)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

02 Data on the tourists' spending in Jeju

■ Places to shop

- The largest number of people preferred Lotte Duty Free Store (59.3% of the total feedback) as their place to shop.



02 Data on the tourists' spending in Jeju

■ Places to shop

- For the past three years, duty free stores have been steadily preferred as the places to shop. Overall preferences to shopping destinations are even.

Rank	2014	2015	2016
1	Lotte Duty Free Store (31.2)	Shilla Duty Free Store (39.2)	Lotte Duty Free Store (59.3)
2	Shilla Duty Free Store (23.1)	Lotte Duty Free Store (31.4)	Shilla Duty Free Store (36.3)
3	Traditional markets (12.3)	Local specialty stores(7.8)	Downtown commercial areas (14.2)
4	Large discount stores (9.8)	Downtown commercial areas(6.6)	Local specialty stores(9.2)
5	Others (8.3)	Shops within attractions (4.9)	Traditional markets (6.5)
6	Downtown commercial areas (7.0)	Large discount stores (4.4)	Shops within attractions (5.6)
7	Shops within attractions (5.2)	Traditional markets (4.1)	Large discount stores (3.3)
8	Local specialty stores(2.9)	Others (1.2)	JTO Duty Free Store(2.5)
9	Agricultural food stores (0.3)	Agricultural food stores (0.4)	Agricultural food stores (0.6)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

03 Evaluation on tours in Jeju

Reasons why tourists are dissatisfied with tours in Jeju

- Main reasons of dissatisfaction was communication barriers, high prices, Food not favored, and inconvenient transportation.

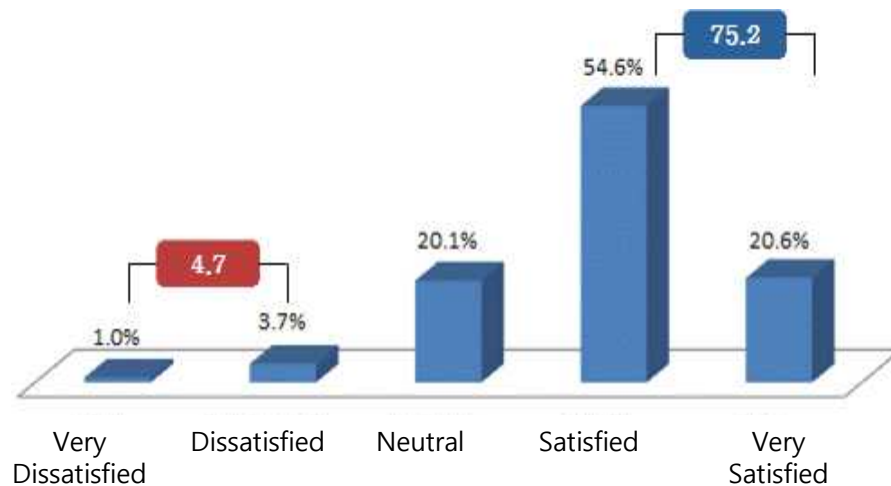
Classification	2014	2015	2016
1 st	Communication barriers (22.6)	Communication barriers (22.8)	Expensive prices (28.8)
2 nd	Immigration process (18.9)	Expensive prices (13.5)	Communication barriers (24.6)
3 rd	Expensive prices (9.4)	Food not favored (10.9)	Immigration process(23.9)
4 th	Lack of variety in items to shop (9.4)	Immigration process (9.9)	Food not favored (11.3)

※ In 2014 and 2015, the number of cases were used for analysis while in 2016, the number of respondents were used for the data. So, anyone who compares the data on a yearly basis should pay more attention to such differences.

03 Evaluation on tours in Jeju

■ Immigration process

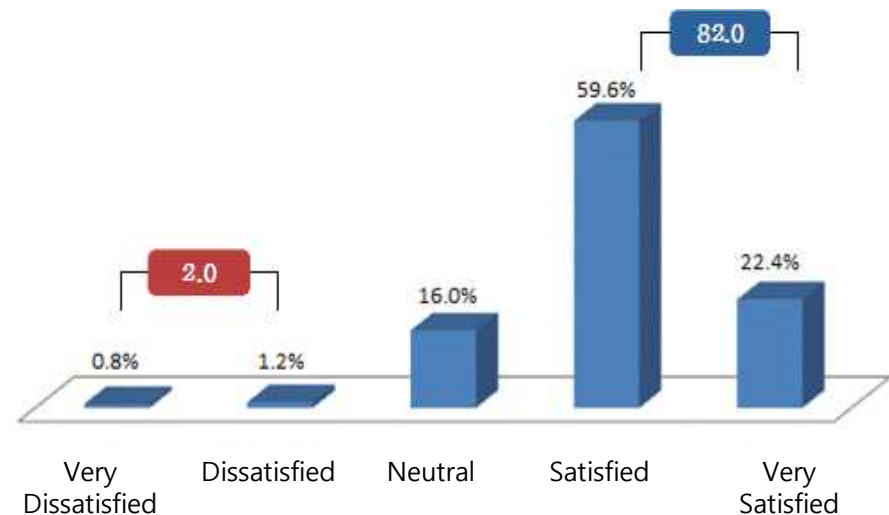
- The satisfaction score: 3.90



Classification	2014	2015	2016
Average	3.68	3.81	3.90

■ Facilities and services of ports

- The satisfaction score: 4.02

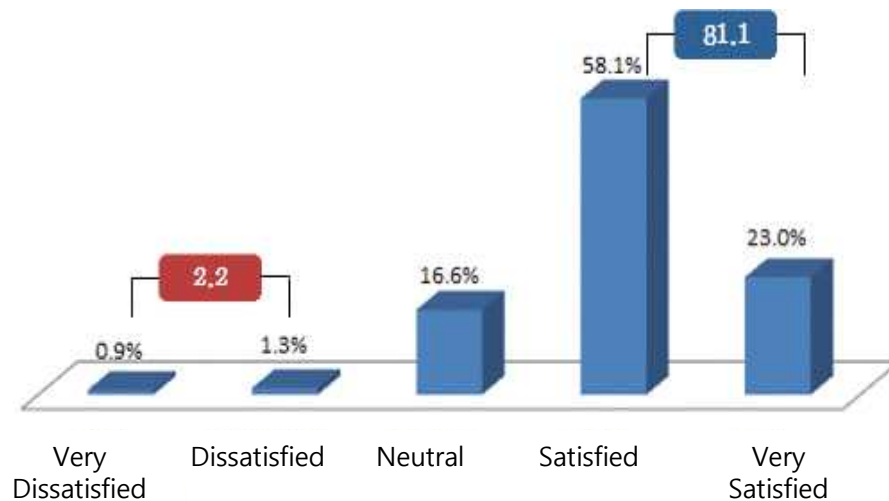


Classification	2014	2015	2016
Average	3.99	4.08	4.02

03 Evaluation on tours in Jeju

Public transportation

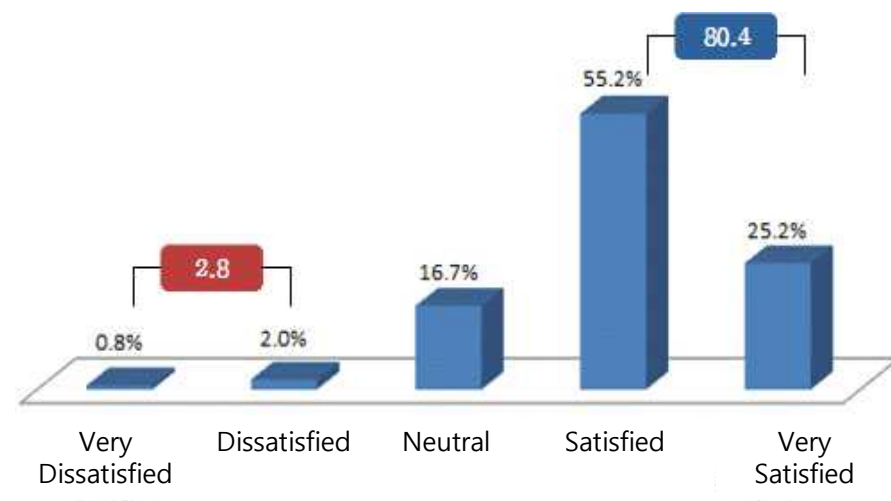
- The satisfaction score: 4.01



Classification	2014	2015	2016
Average	3.69	4.03	4.01

Traffic signs

- The satisfaction score: 4.02

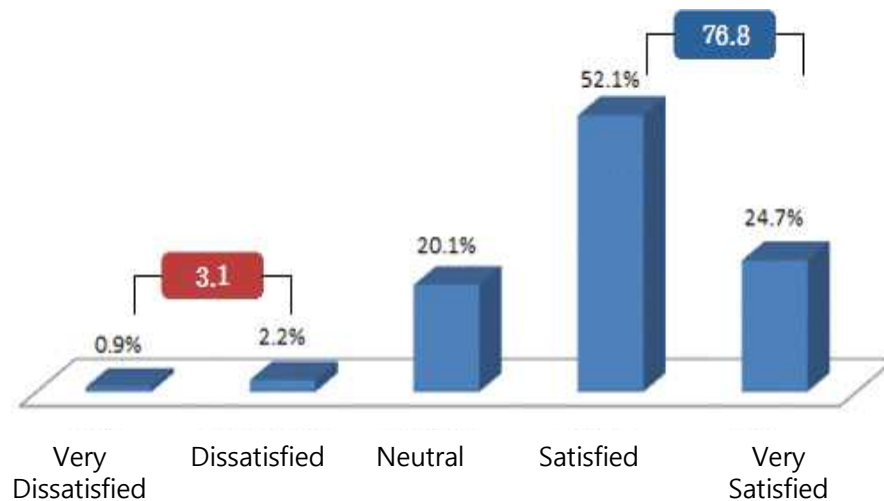


Classification	2014	2015	2016
Average	3.72	3.98	4.02

03 Evaluation on tours in Jeju

■ Process and services for money exchange

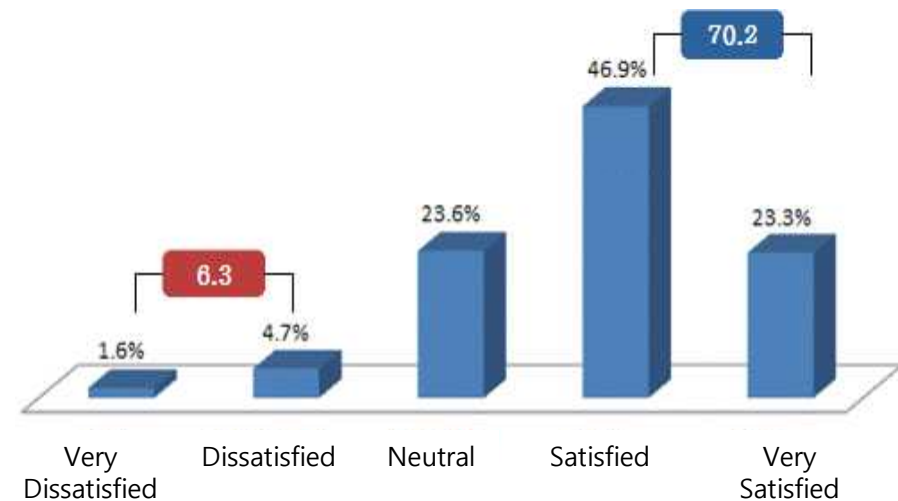
- The satisfaction score: 3.97



Classification	2014	2015	2016
Average	3.49	4.00	3.97

■ Spectacles and entertainments

- The satisfaction score: 3.86

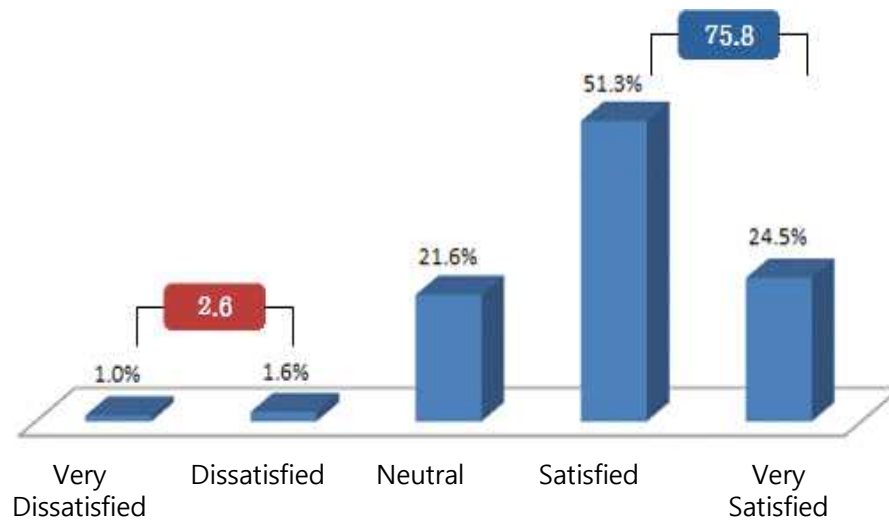


Classification	2014	2015	2016
Average	3.61	3.88	3.88

03 Evaluation on tours in Jeju

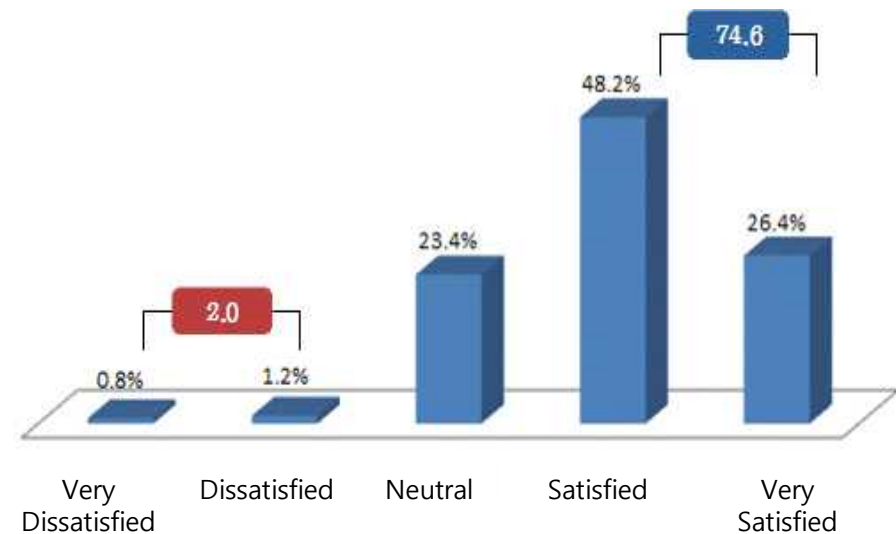
■ Tourist Attractions

- The satisfaction score: 3.97



■ Level of satisfaction on food

- The satisfaction score: 3.98



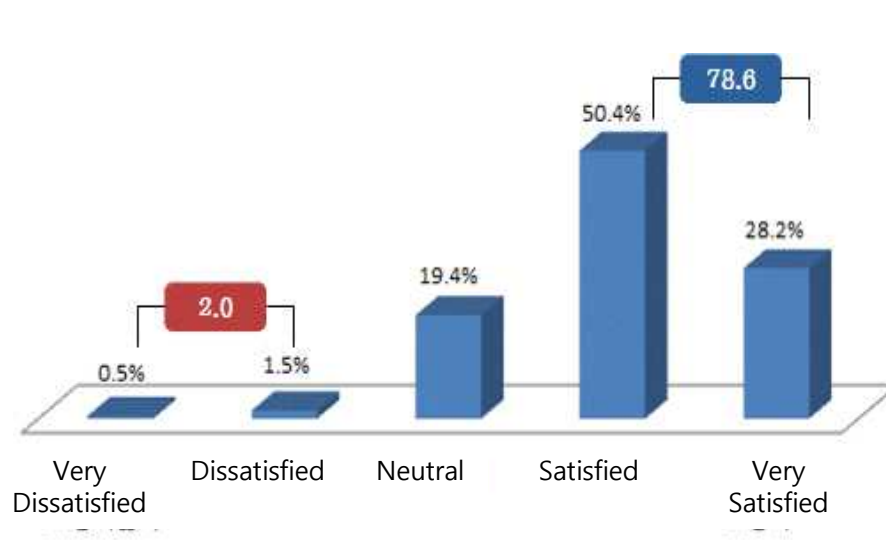
Classification	2014	2015	2016
Average	3.77	4.01	3.97

Classification	2014	2015	2016
Average	3.68	3.98	3.98

03 Evaluation on tours in Jeju

■ Rental car and charter bus

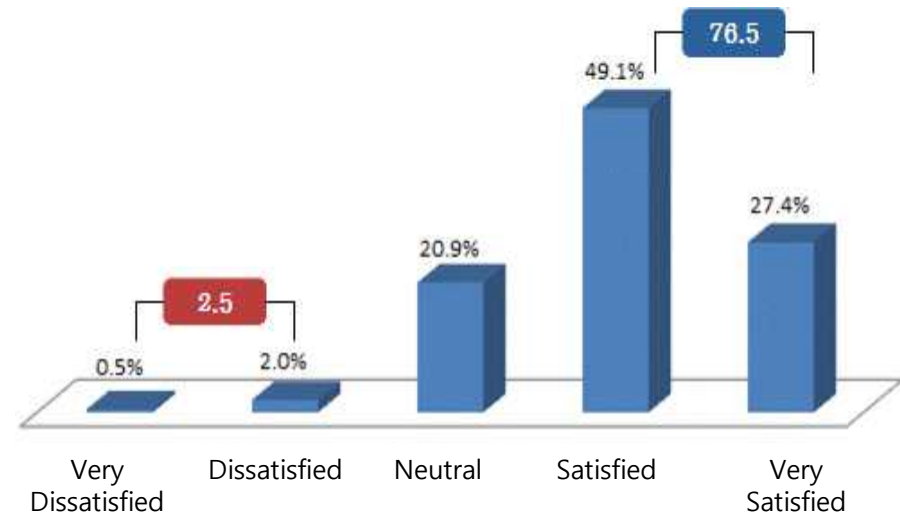
- The satisfaction score: 4.04



Classification	2014	2015	2016
Average	4.00	4.10	4.04

■ Level of satisfaction on shopping

- The satisfaction score: 4.01

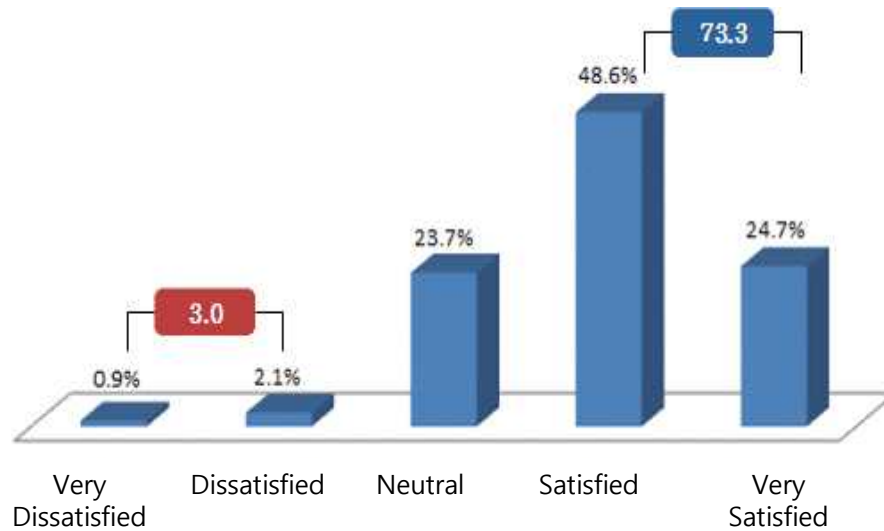


Classification	2014	2015	2016
Average	3.88	4.03	4.01

03 Evaluation on tours in Jeju

Travel cost

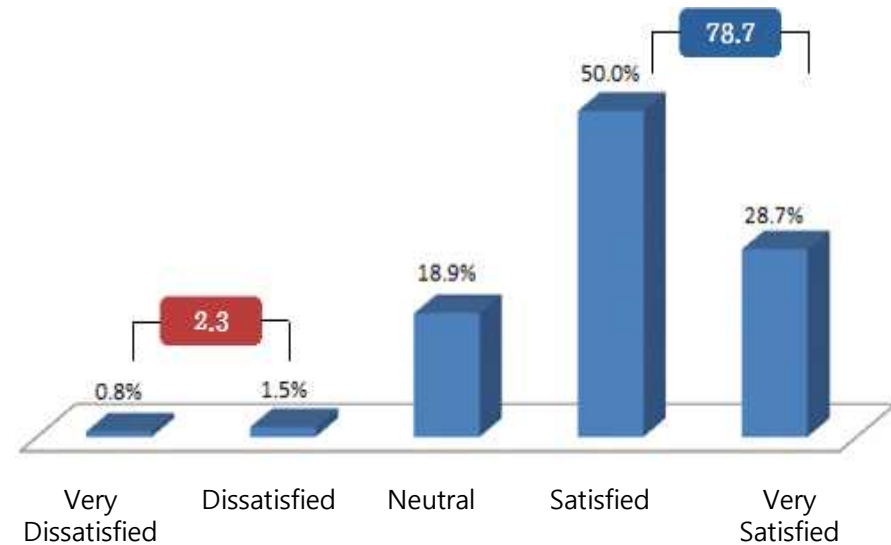
- The satisfaction score: 3.94



Classification	2014	2015	2016
Average	3.79	4.05	3.94

Kindness of residents

- The satisfaction score: 4.04

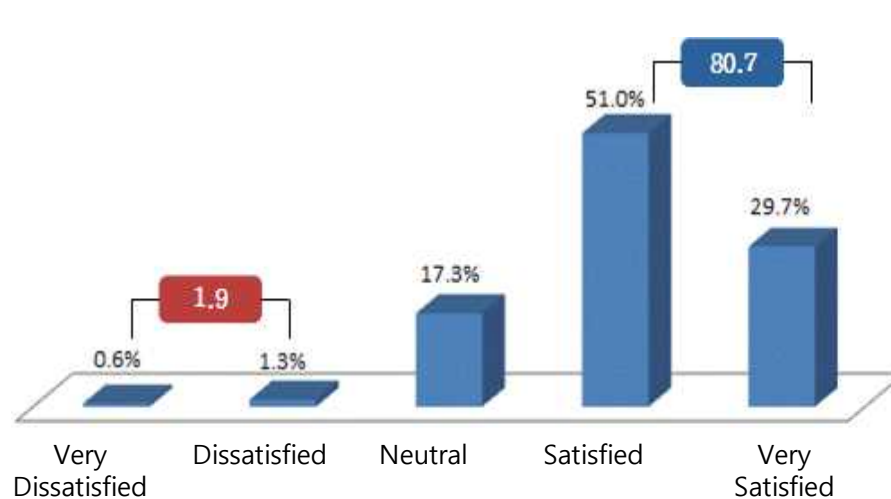


Classification	2014	2015	2016
Average	4.00	4.08	4.04

03 Evaluation on tours in Jeju

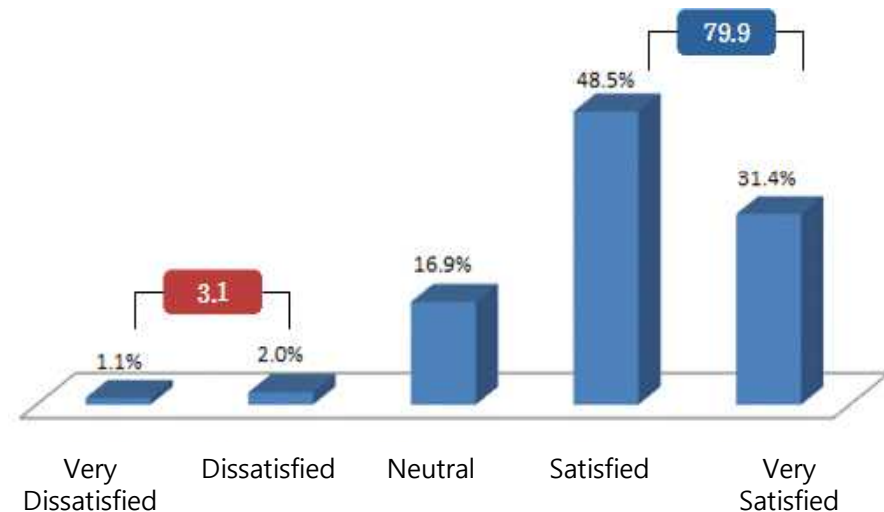
Kindness of staff at attractions

- The satisfaction score: 4.08



Service of tour guides

- The satisfaction score: 4.07



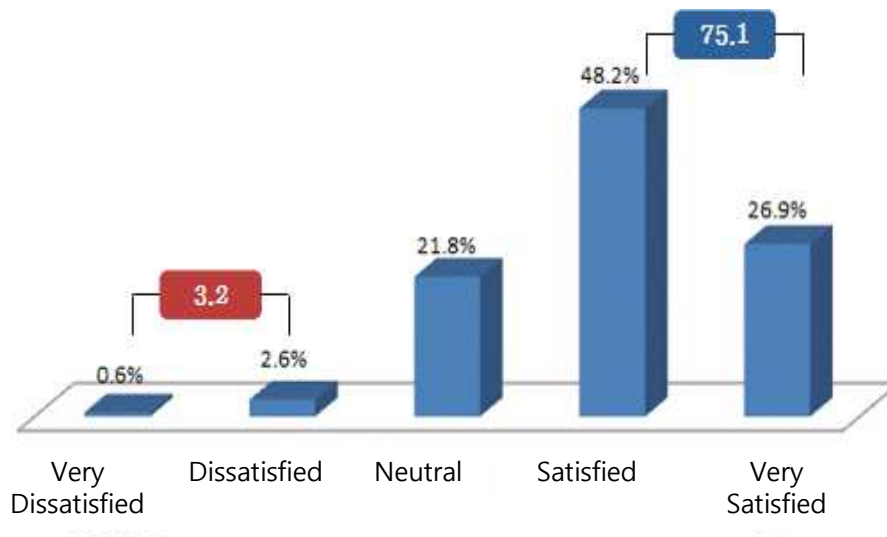
Classification	2014	2015	2016
Average	3.93	4.13	4.08

Classification	2014	2015	2016
Average	3.91	4.17	4.07

03 Evaluation on tours in Jeju

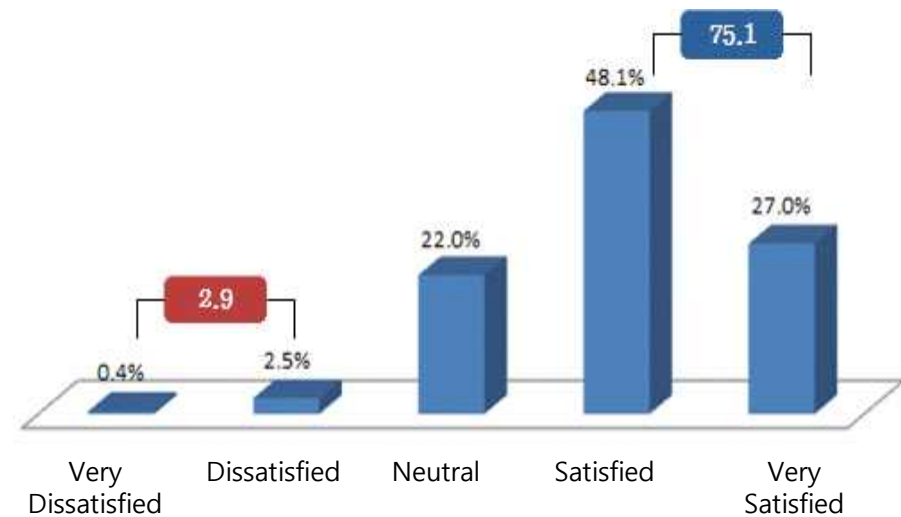
■ Guidance on tour information

- The satisfaction score: 3.98



■ Tour guide maps

- The satisfaction score: 3.99



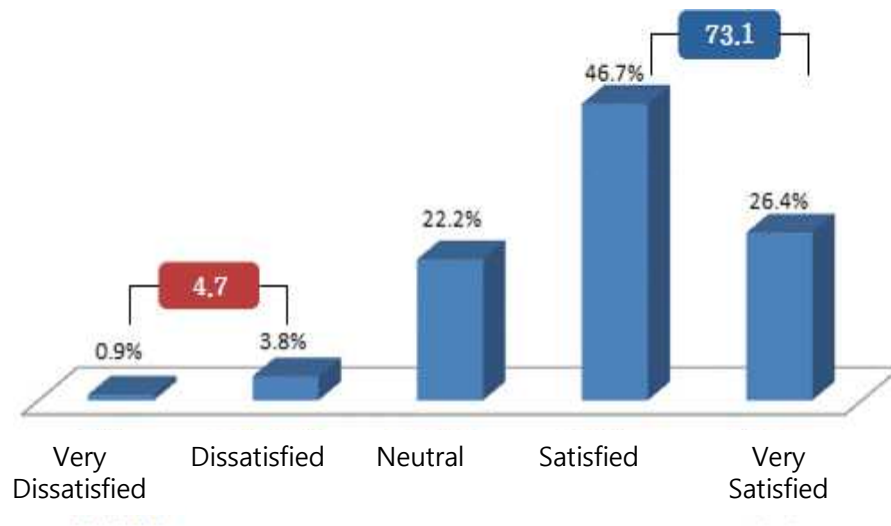
Classification	2014	2015	2016
Average	4.00	4.05	3.98

Classification	2014	2015	2016
Average	3.85	4.04	3.99

03 Evaluation on tours in Jeju

Communication

- The satisfaction score: 3.94

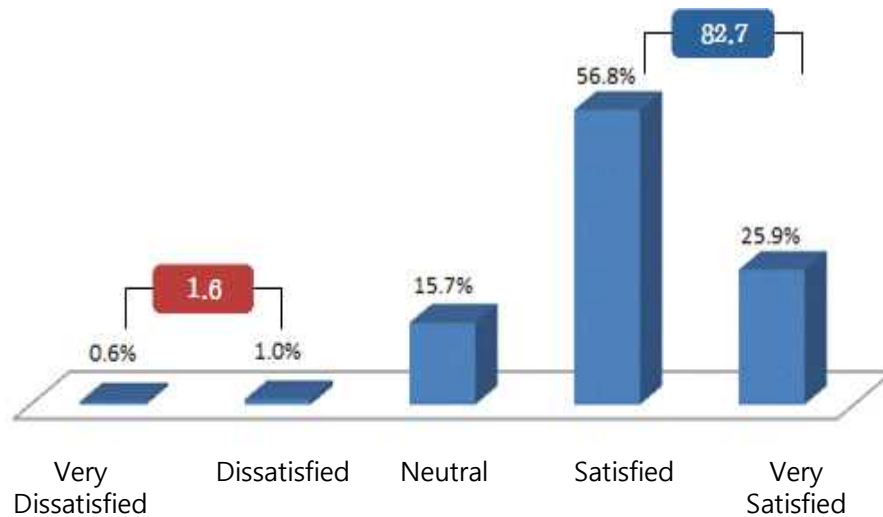


Classification	2014	2015	2016
Average	3.64	3.96	3.94

03 Evaluation on tours in Jeju

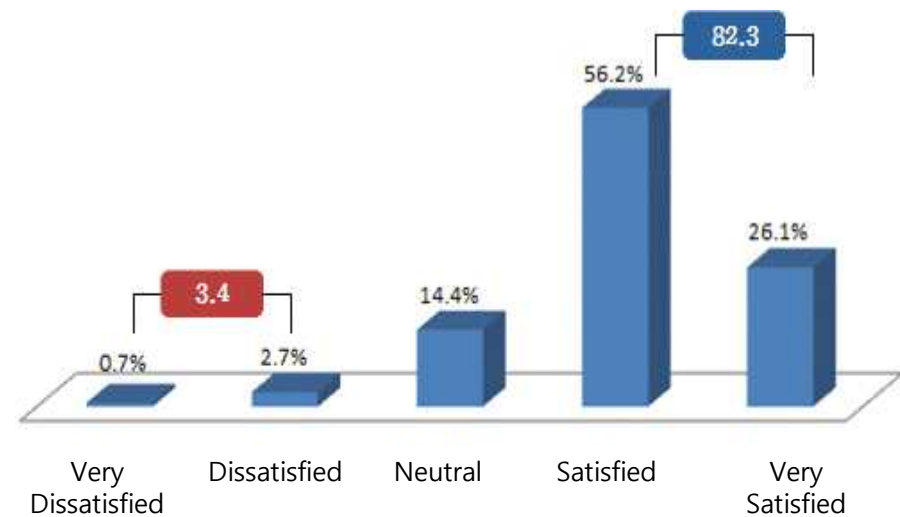
Level of satisfaction on the overall tour experience in Jeju

- The satisfaction score: 4.07



Willingness to re-visit Jeju

- The satisfaction score: 4.04



Classification	2014	2015	2016
Average	3.83	4.07	4.07

Classification	2014	2015	2016
Average	3.90	4.04	4.04

03 Evaluation on tours in Jeju

Willingness to recommend Jeju to others

- Whether to recommend: 4.05

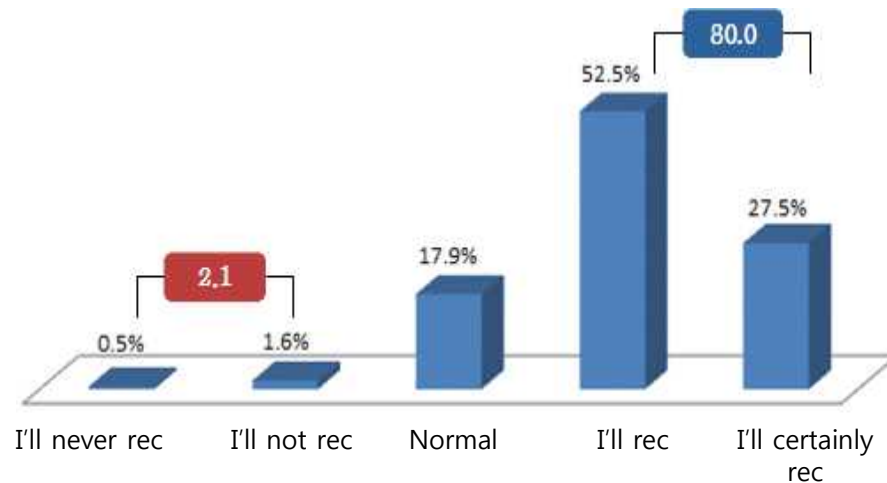
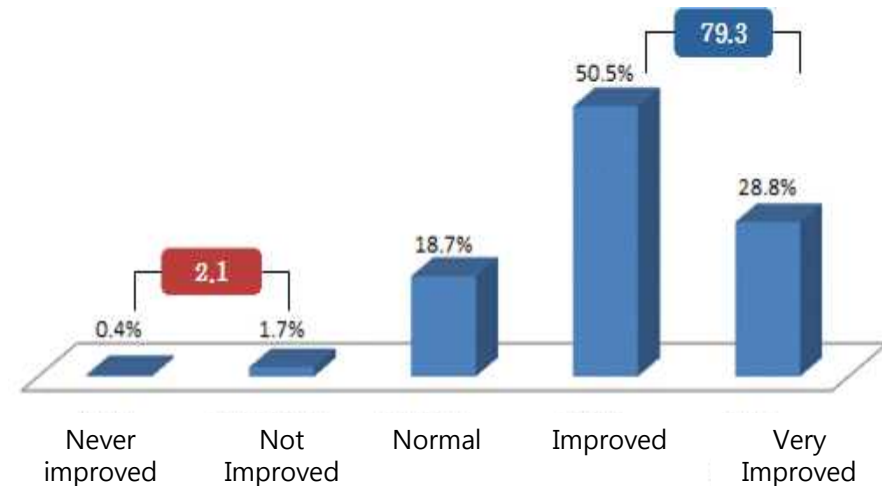


Image improvement on Jeju

- Image improvement score: 4.05



Classification	2014	2015	2016
Average	3.84	4.06	4.05

Classification	2014	2015	2016
Average	3.86	4.03	4.05