

Vanuatu International Visitor Survey

Jan - Dec 2017

AUT



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NEW ZEALAND TOURISM
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The views expressed in this publication do not necessarily reflect those of the New Zealand Government.

Summary of the Key Findings

Total Direct Economic Impact for Jan-Dec 2017

US\$172.7 Million (Vt 18.7 billion) directly flowing to Vanuatu Economy
US\$ 1,583 (Vt 171,103) per visitor per Trip; 109,108 visitors in all
US\$195 (Vt 21,031) per visitor per day

Respondent Profile and Characteristics

- 76% from Aus/NZ
- 80% under 59 years
- 55% female
- 71% household income less than \$100,000

Decision Making

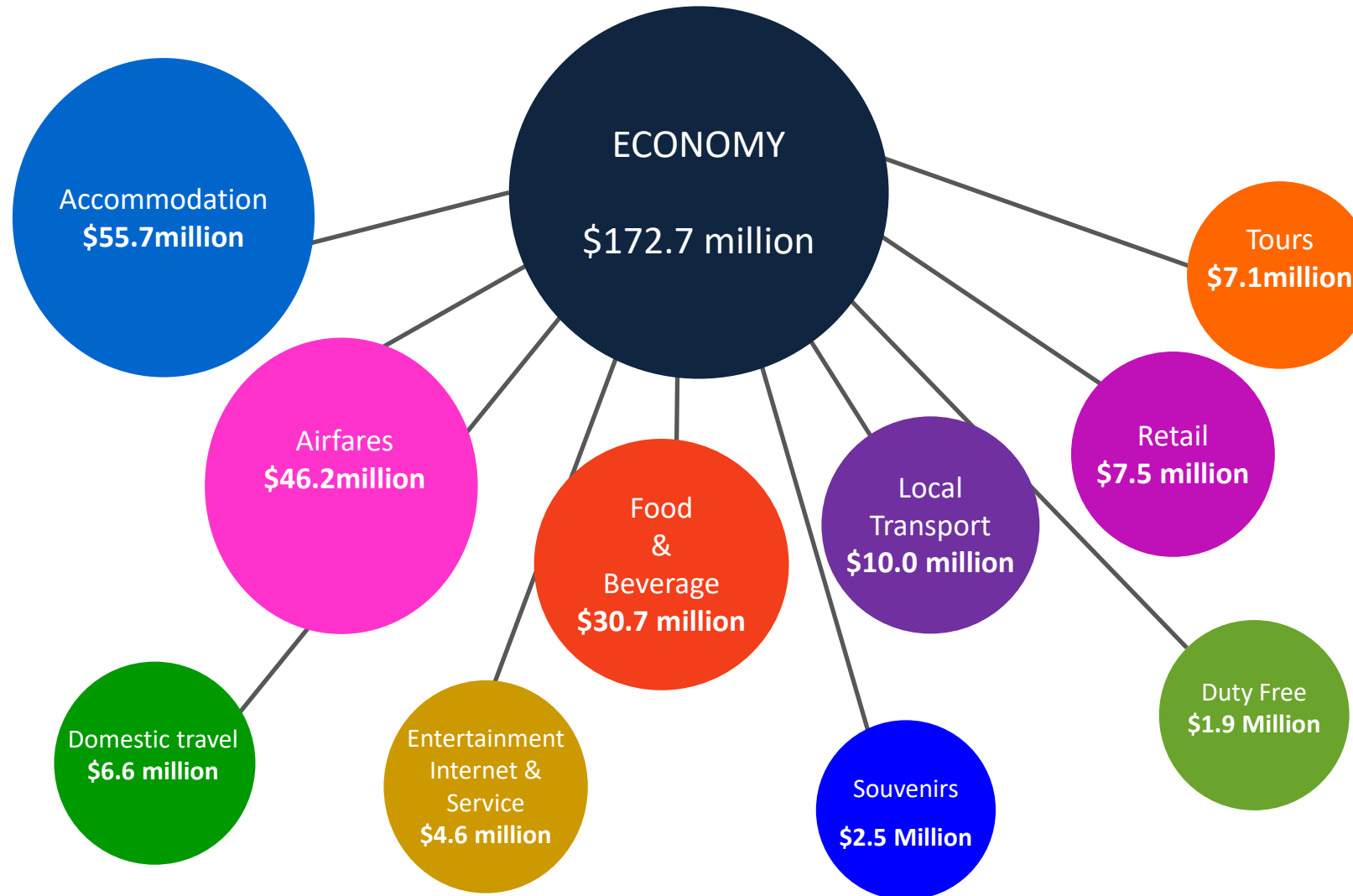
- General travel websites, friends and family and previous visits are key sources for planning holidays
- 55% purchased by themselves

Satisfaction

- 78% would come back
- Satisfied with local people, activities and attractions, and environment
- Public service and facilities, rubbish, prices of goods and services least appealing

Direct Economic Impact for Jan – Jun 2017

Pre-Arrival and in Country Spend



Presentation Structure



Respondents (Jan - Dec 2017)

Total number of e-mails sent: **40,581**



Conversion
rate of
14.2%

Total number of responses: **5,745**



Responses cover a total of
9,781 adults and **1821** children



10.6% of all
visitors during
the period

IVS Respondents (Jan 2015 - Dec 2017)



Respondents
to Date
15,078



Total people
included in
expenditure
analysis
30,369

Visitor Characteristics - IVS Respondent Data



Household Income

38% Under \$50,000
33% \$50,000 - \$100,000
29% Over \$100,001



People Covered

9781 Adults
1821 Children

Gender



Females



Age

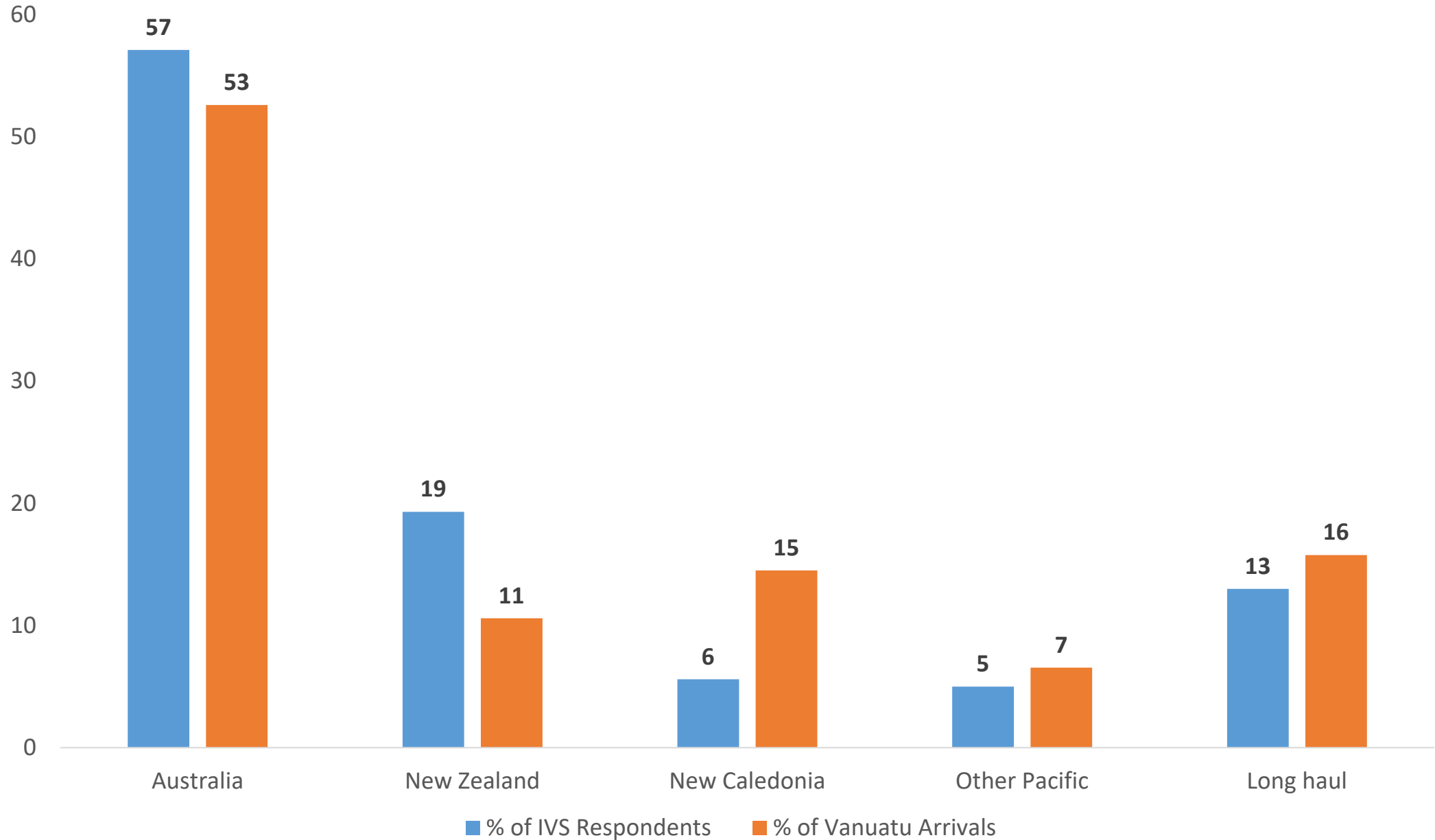
19% 30-39 years old
21% 40-49 years old
23% 50-59 years old



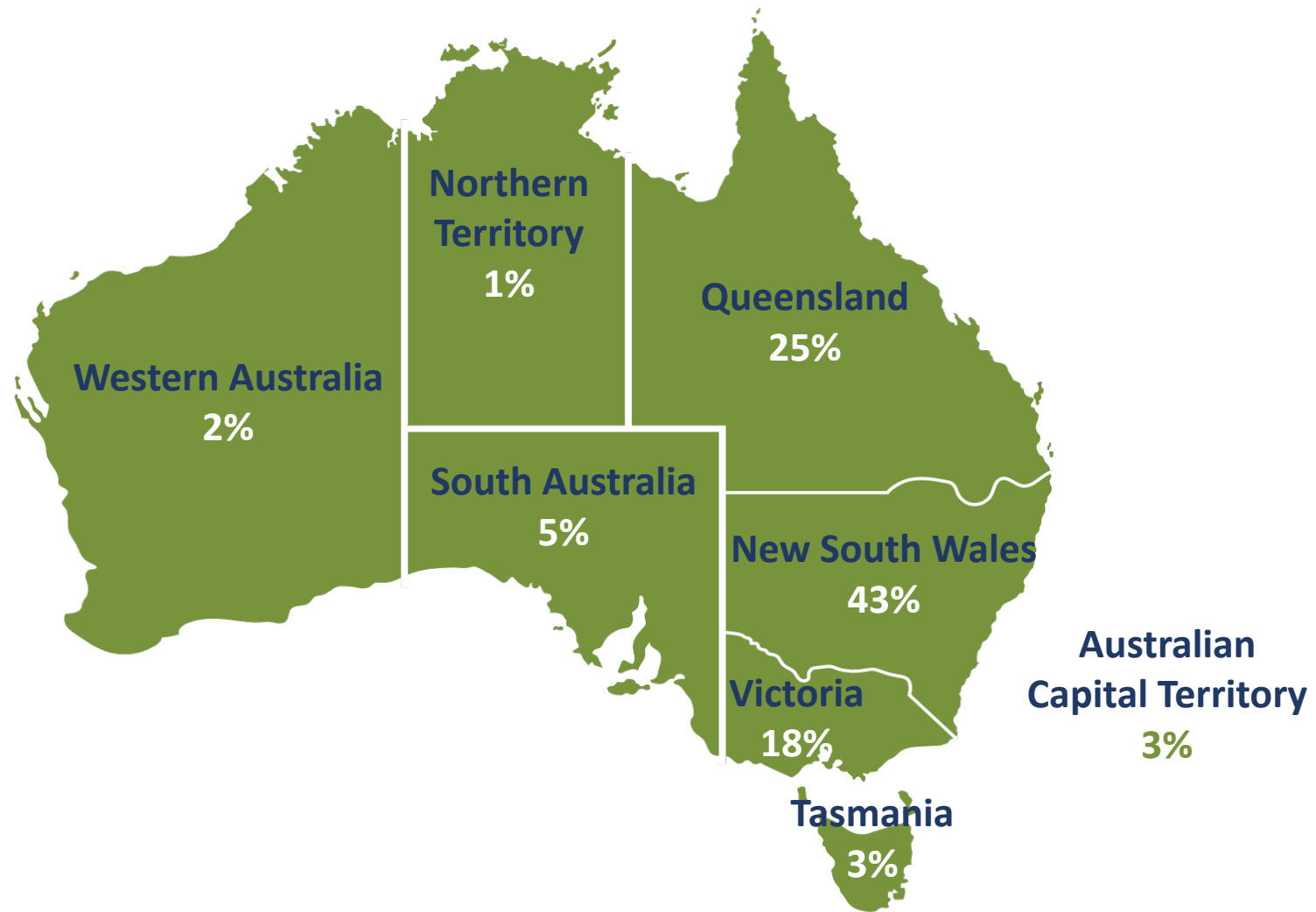
Country of Origin

57% Australia
19% New Zealand
13% Long Haul
6% New Caledonia
5% Other Pacific

Country of Origin

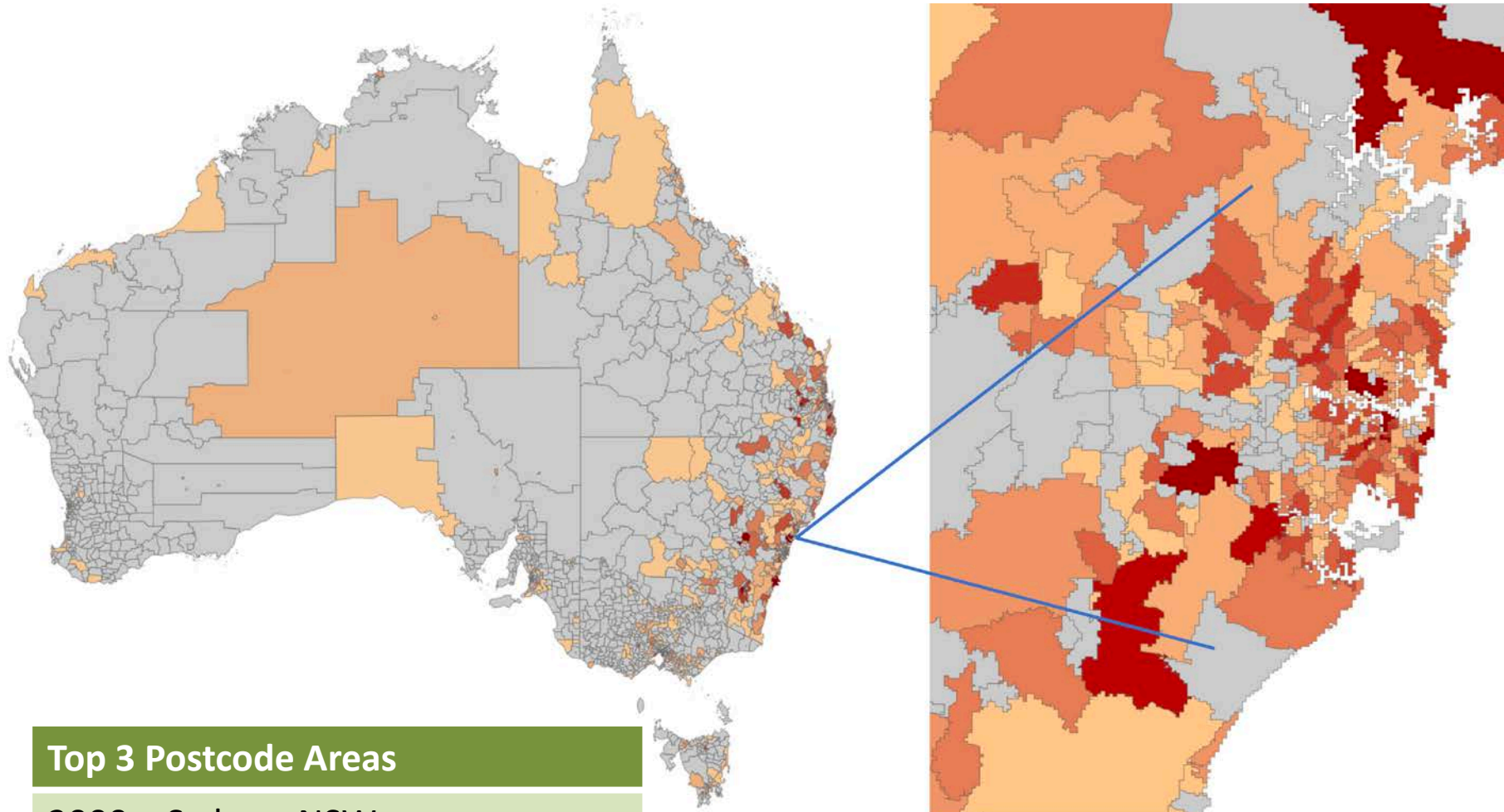


Australian Respondents - IVS Respondent Data



New South Wales, Queensland and Victoria make up **86%** of all Australian visitor arrivals

Heat Maps for Australia



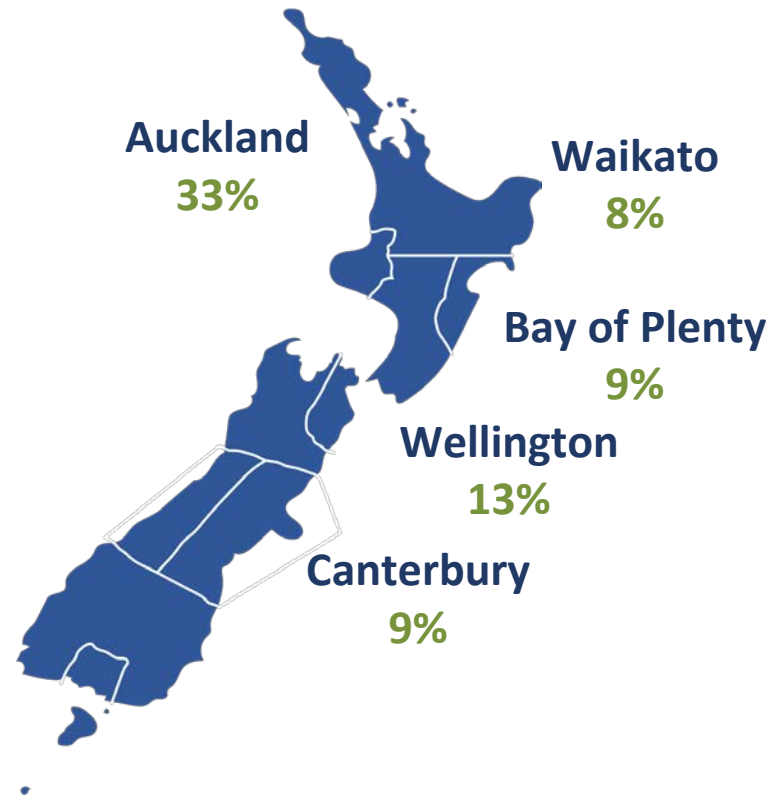
Top 3 Postcode Areas

2000 – Sydney, NSW

4000 – Brisbane, QLD

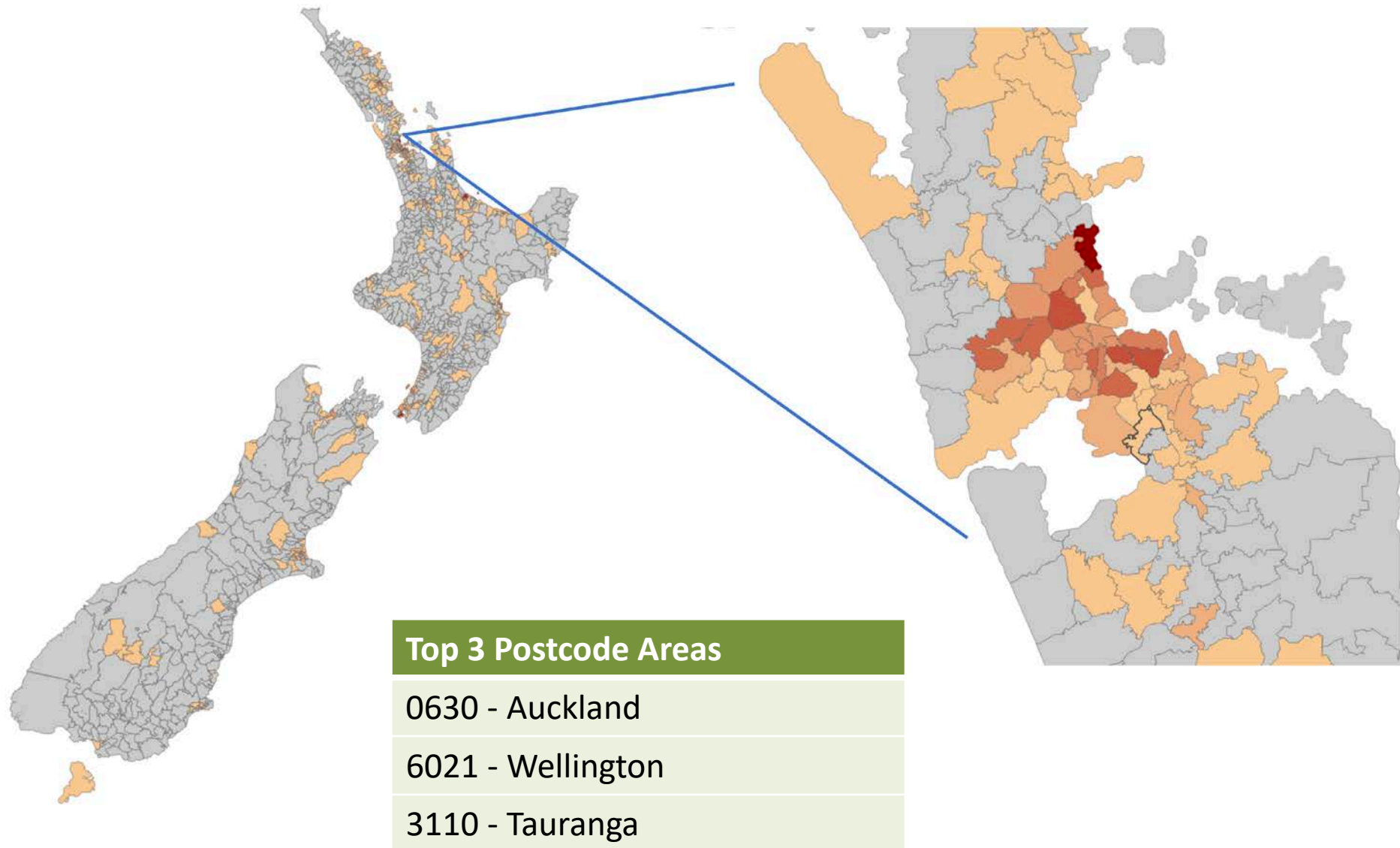
2800 – Orange, NSW

New Zealand Respondents - IVS Respondent Data

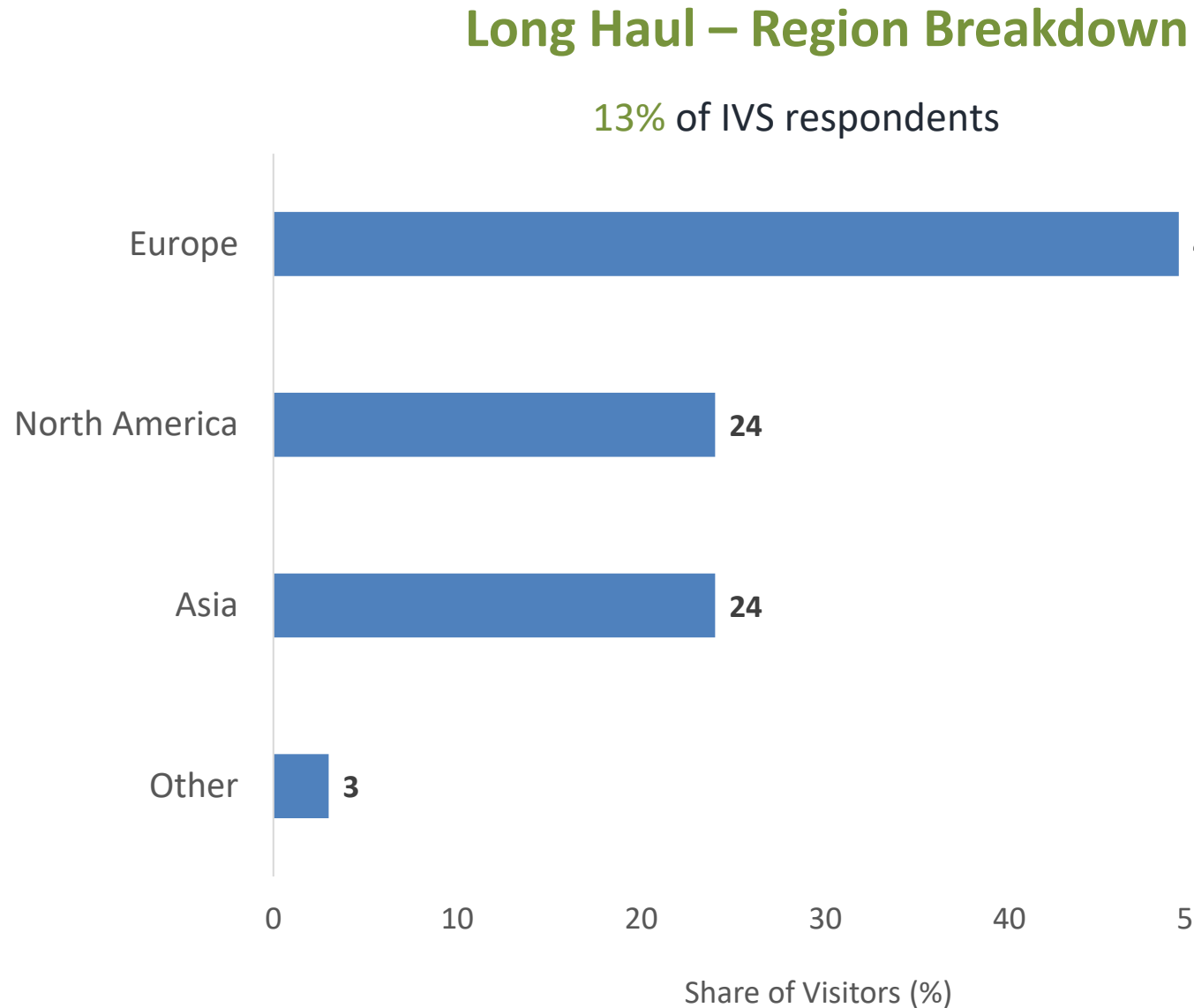


Auckland, Wellington, Bay of Plenty, Canterbury, and Waikato make up **72%** of all New Zealand visitor arrivals

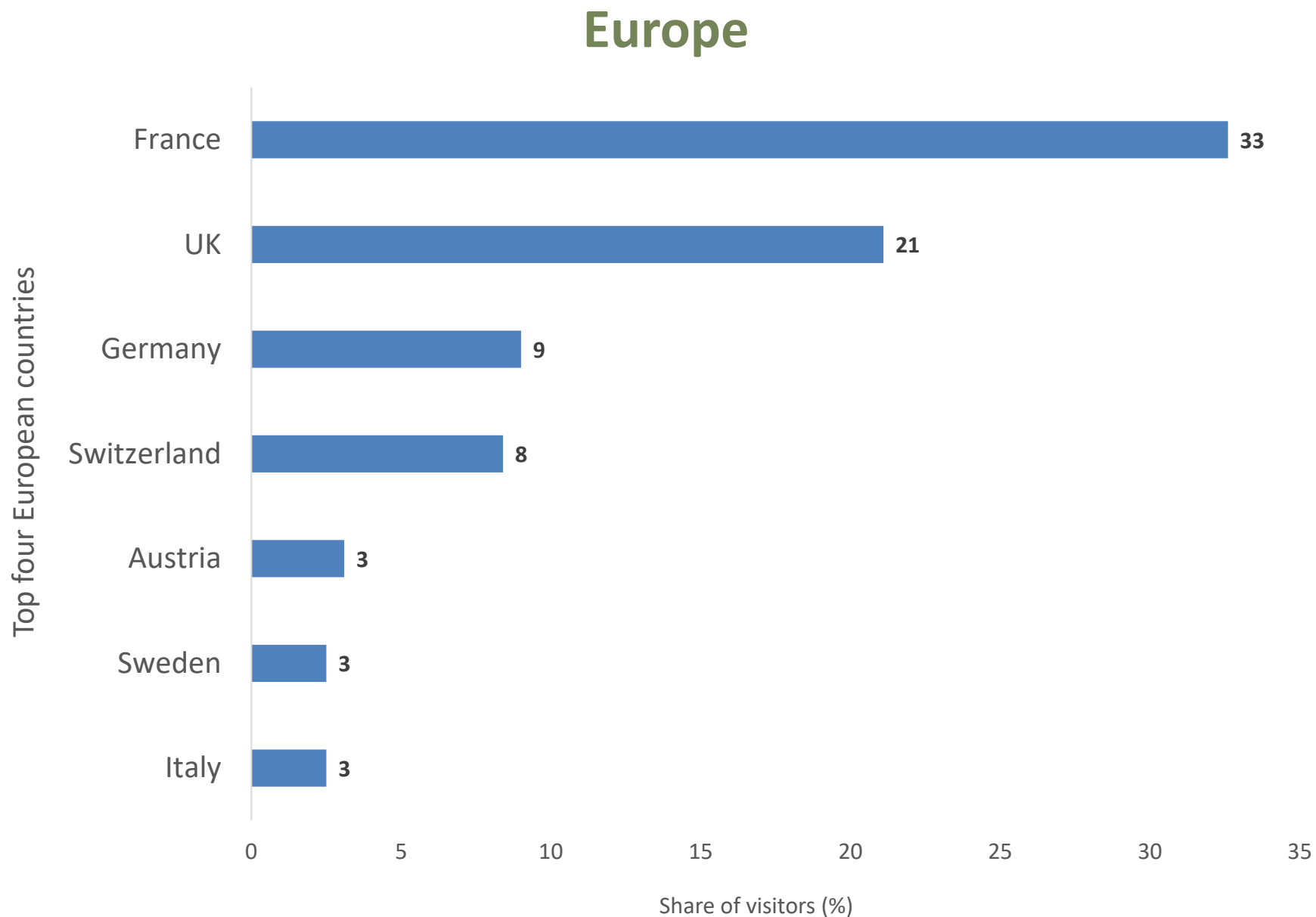
Heat Maps for New Zealand



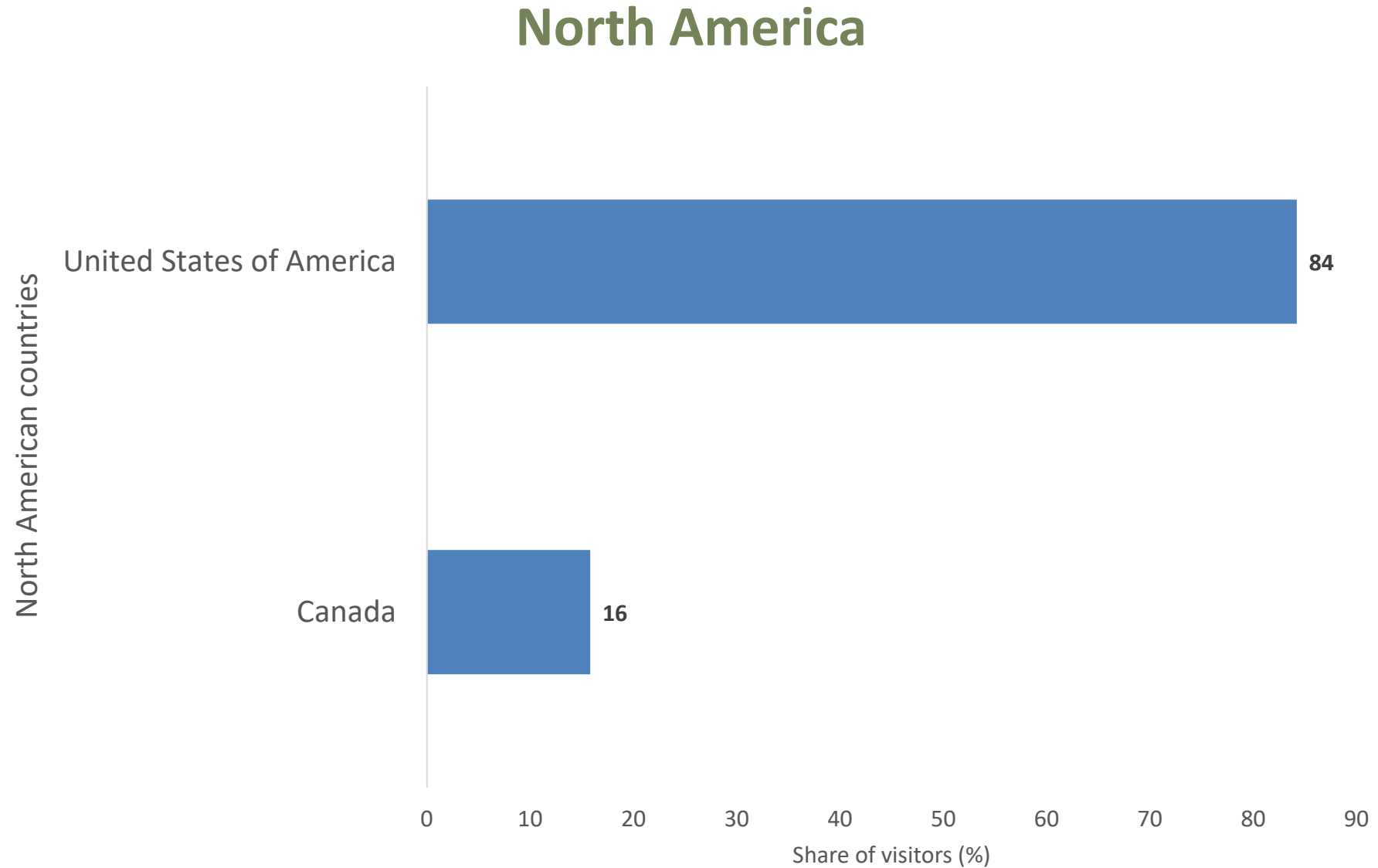
Long Haul Market- Region Breakdown



Long Haul Market – Europe

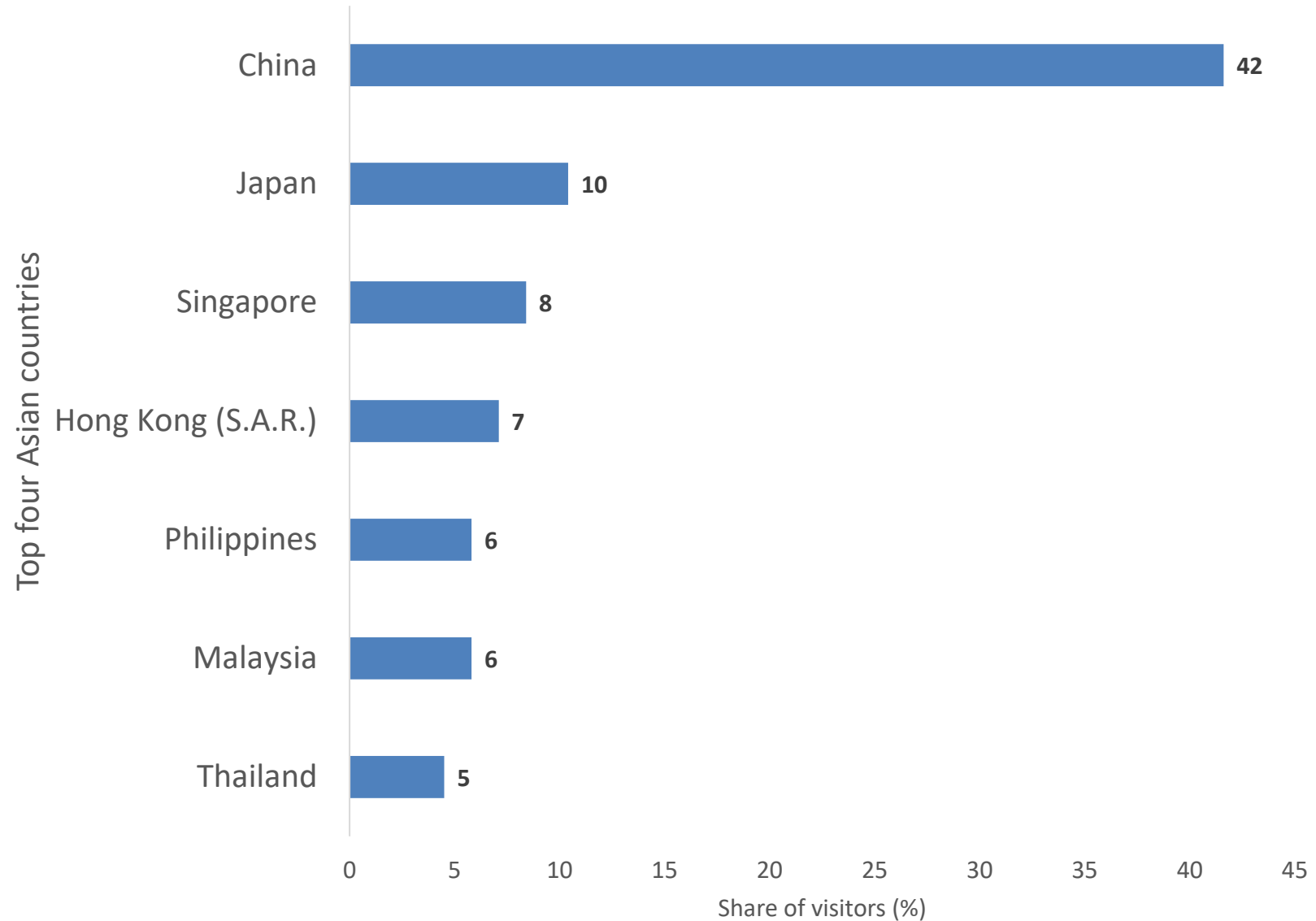


Long Haul Market – North America

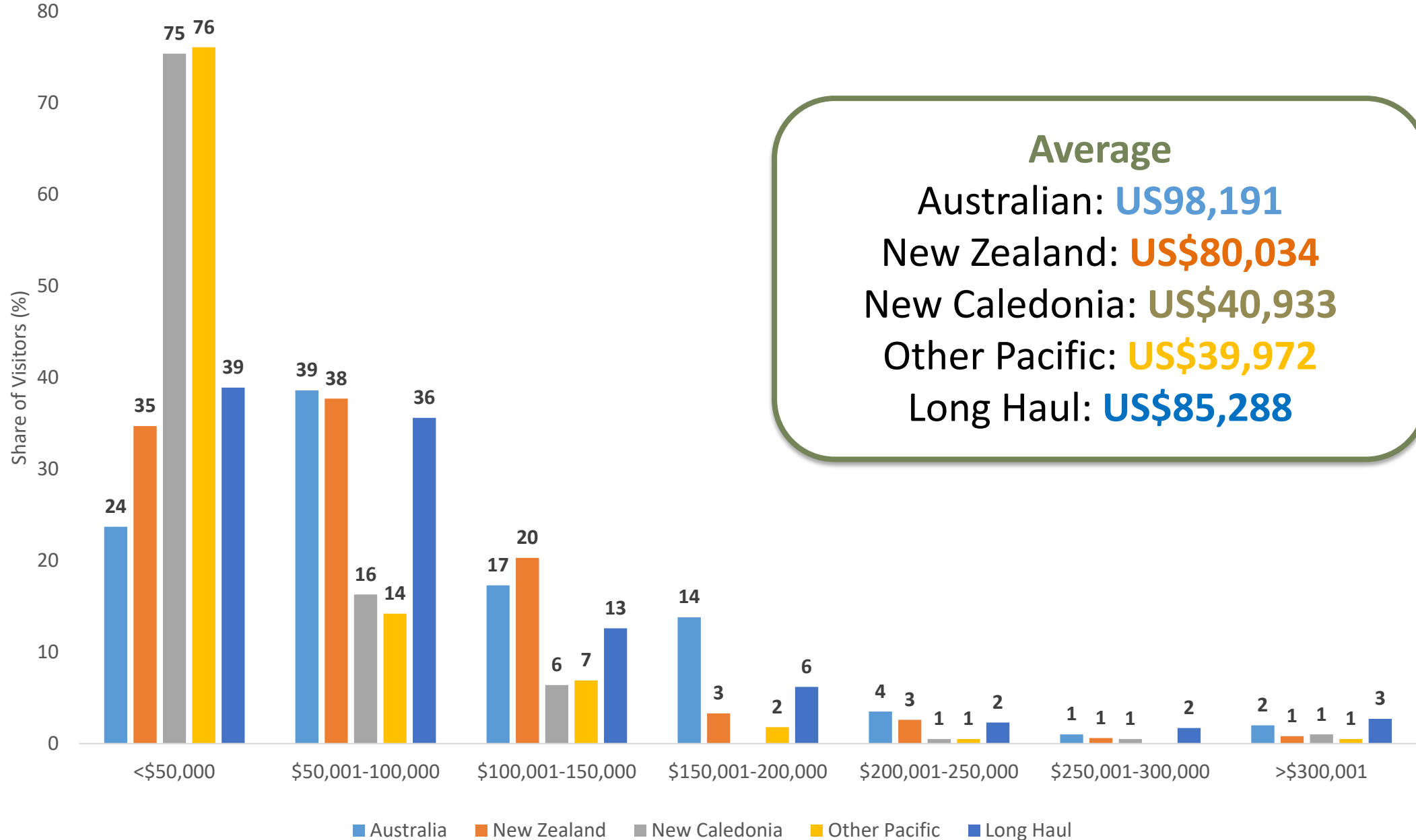


Long Haul Market – Top Countries

Asia



Annual Household Income



Presentation Structure



Visitor Characteristics – Summary



Airlines Used

57% Air Vanuatu
25% Virgin Australia
10% Aircalin
9% Fiji Airlines



Length of Stay

8.1 Nights on average
59% Stayed up to 1 week



Previous Visits

58% First trip
23% 1 or 2 times



Travel Companions

38% One Companion
14% Solo



Purpose of Visit

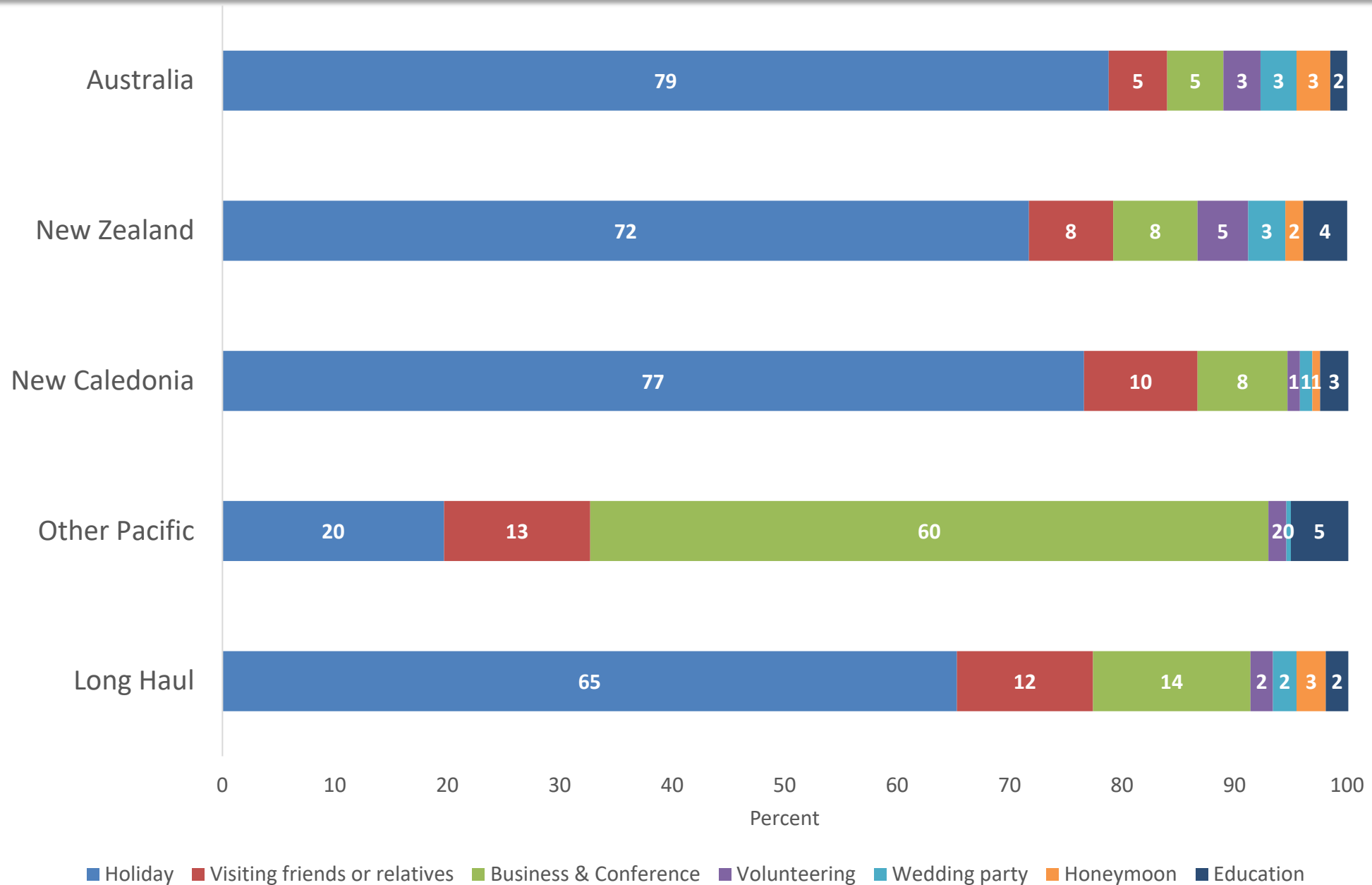
72% Holiday
11% Business/Conference
8% Visiting Friends/Family



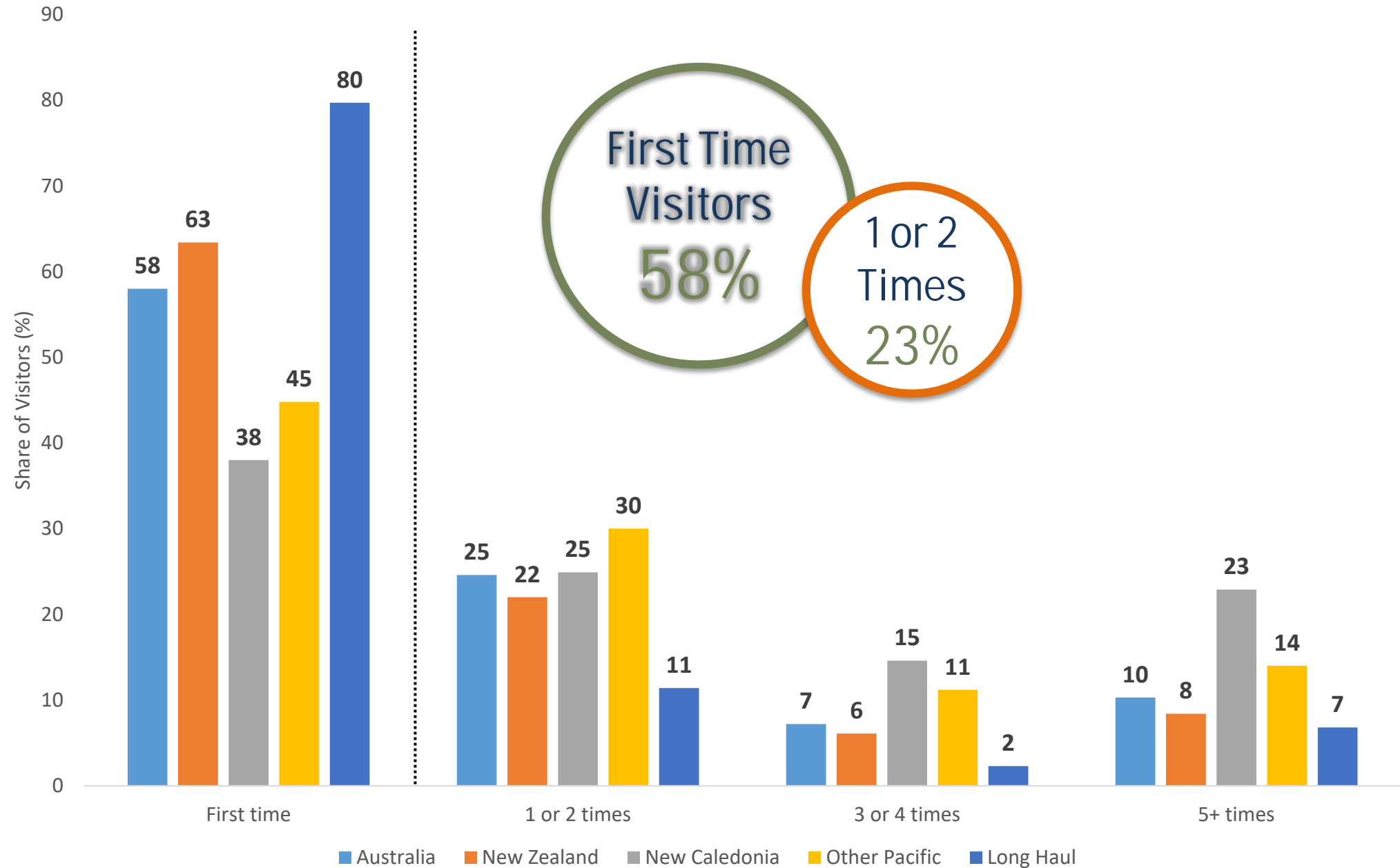
Islands Visited on Trip

97% Efate (Port Vila)
18% Tanna
15% Espiritu Santo

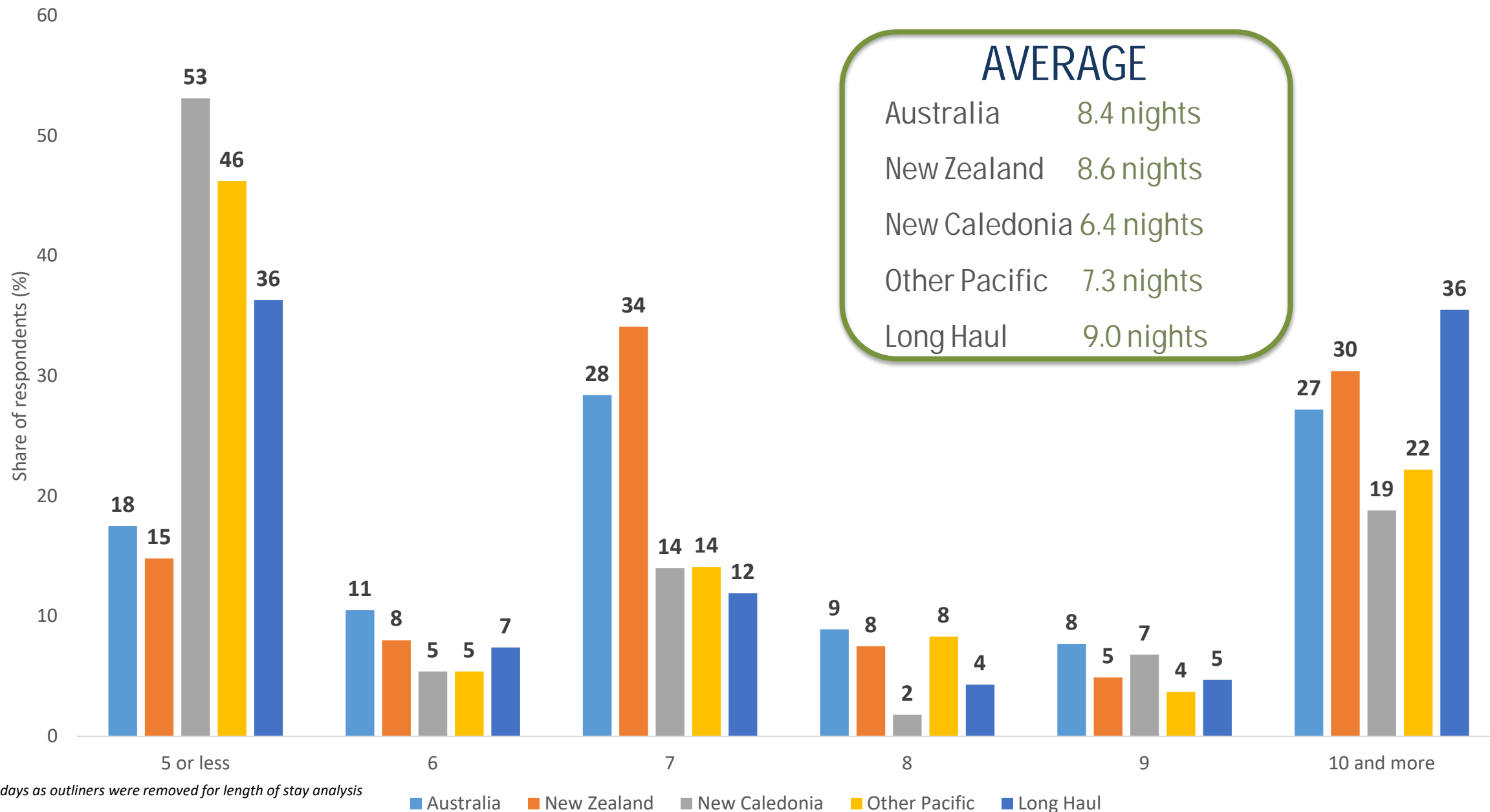
Main Purpose of Visit



Previous Visits



Length of Stay (nights)



Airlines Used for Travel - Holiday



Air Vanuatu

57%/58%



australia

25%/27%



9%/5%



10%/10%

Others (Qantas,
Solomon Airlines)

9%/9%

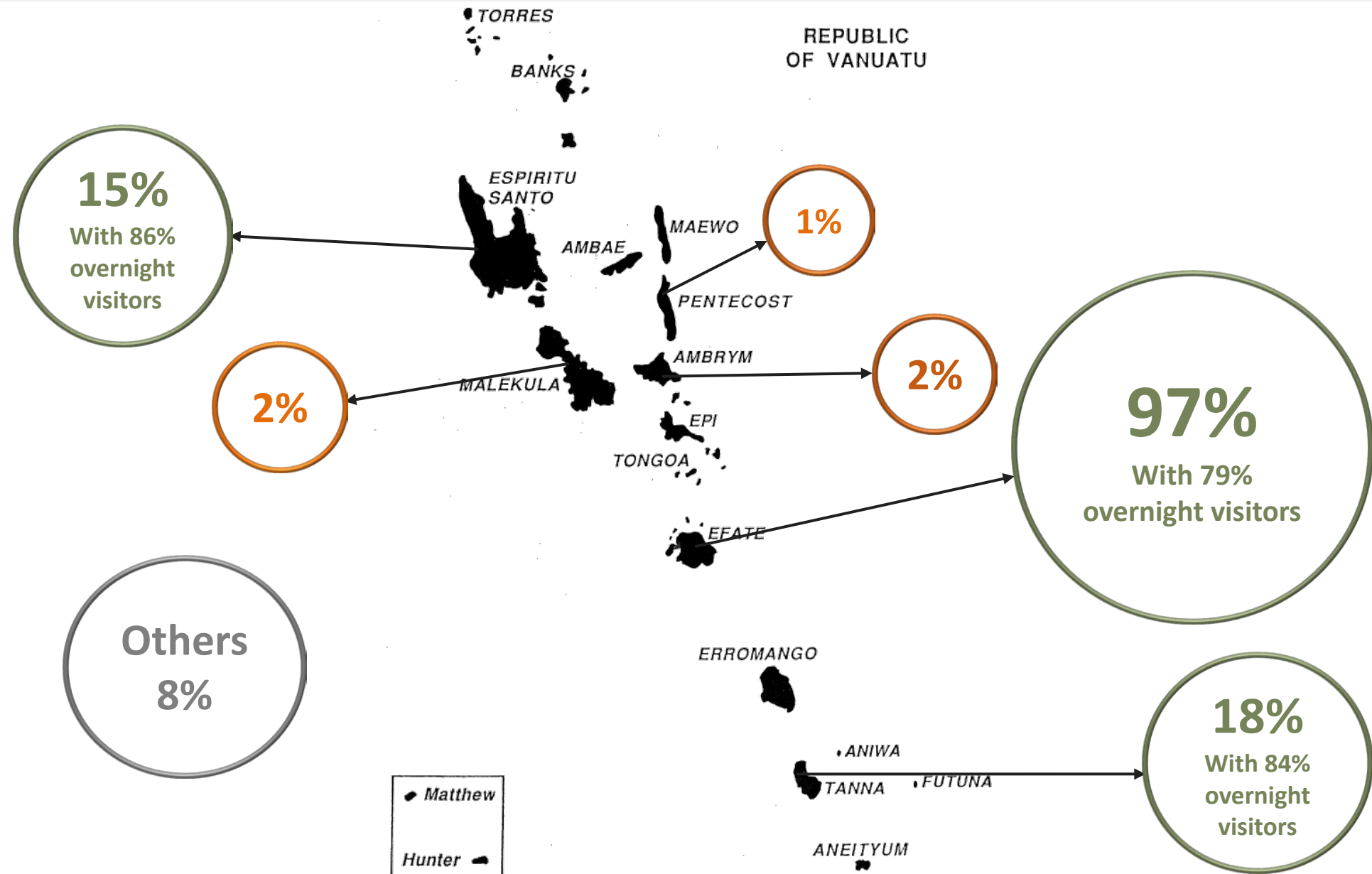


Fiji Airways and Aircalin are more commonly used by visitors from Pacific countries

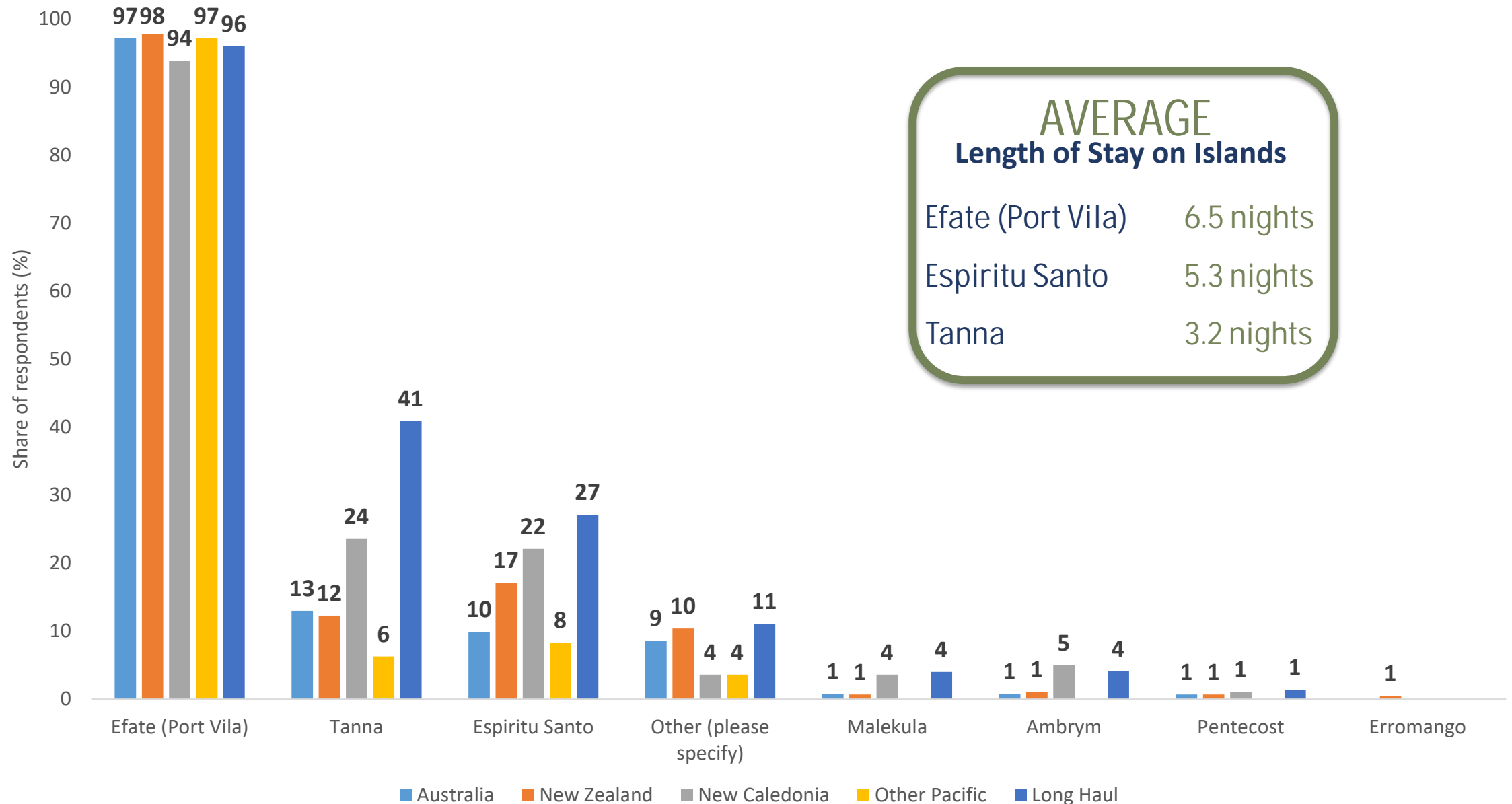
* Text is grey represents all visitors/green represents 'holiday' only



Islands Visited



Outer Islands Visited – Country of Origin



Note: Multiple responses, therefore total does not add up to 100%

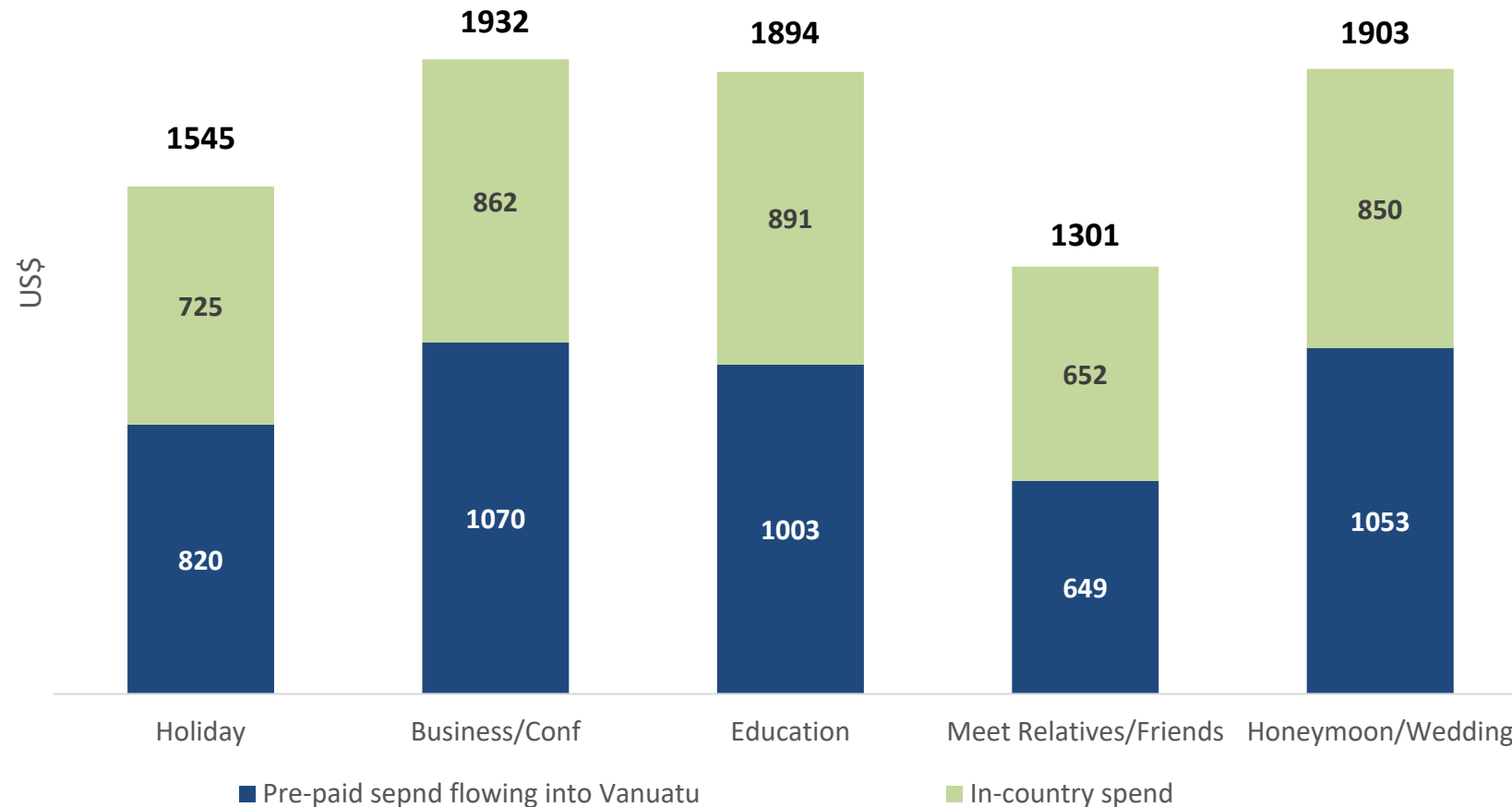
Note: 31+ days as outliers were removed for length of stay analysis

Presentation Structure



Expenditure by Visitor Type

PER PERSON PER VISIT



Expenditure in Vanuatu by Visitor type

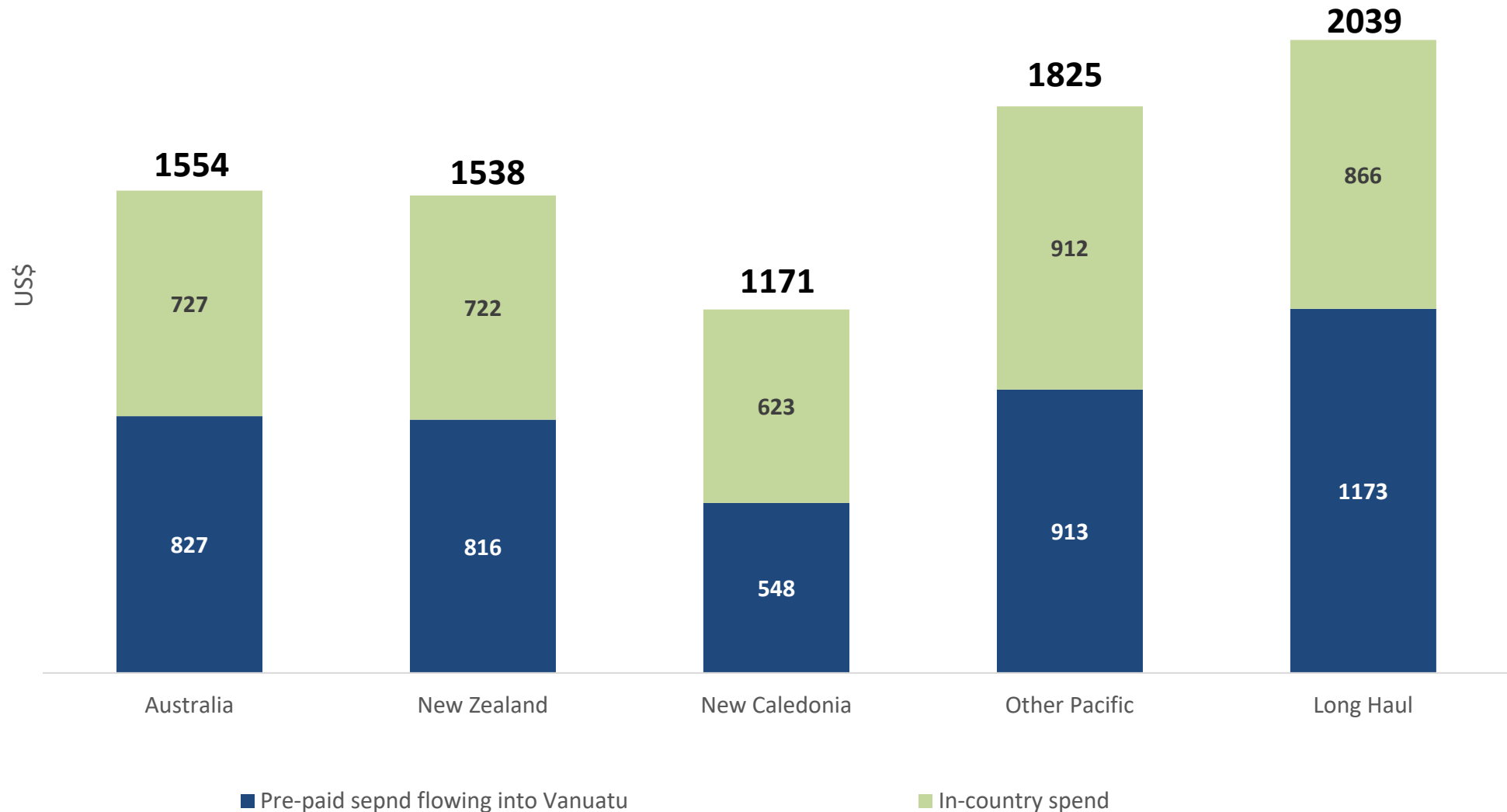
BY VISITOR TYPE				
Expenditure Items	Holiday	Business/ Conference	Meeting family/Friends	Honeymoon/ Wedding
Food & Beverage	31	33	19	31
Accommodation	19	45	13	31
Tours/Tour operator services	10	2	2	11
Retail	8	12	9	8
Domestic travel within Vanuatu	7	12	10	8
Local Transport	6	8	4	5
Entertainment, Internet & Service	5	8	3	6
Souvenirs	3	3	2	3
Duty free shop (alcohol, tobacco, cosmetics)	2	2	1	3
Total expenditure (US\$)	\$92	\$125	\$63	\$106

Expenditure by Visitor Type

	Holiday	Business/ Conference	Meeting Family/Friends	Overall Average
Average Spend Prior to arrival				
Per Person - Whole Trip	\$1,312	\$1,712	\$1,039	\$1,355
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy				
Per Person - Whole Trip	\$820	\$1,070	\$649	\$847
Per Person per Day	\$104	\$155	\$63	\$105
Length of stay	7.9 nights	6.9 nights	10.3 nights	8.1 nights
Average Spend while in Vanuatu				
Per Person - Whole Trip	\$725	\$862	\$652	\$736
Per Person per Day	\$92	\$125	\$63	\$90
Total spend flowing into Vanuatu economy – Whole Trip	\$1,545	\$1,932	\$1,301	\$1,583
Total spend flowing into Vanuatu economy – Per Day	\$196	\$280	\$126	\$195

Expenditure by Market

PER PERSON PER VISIT

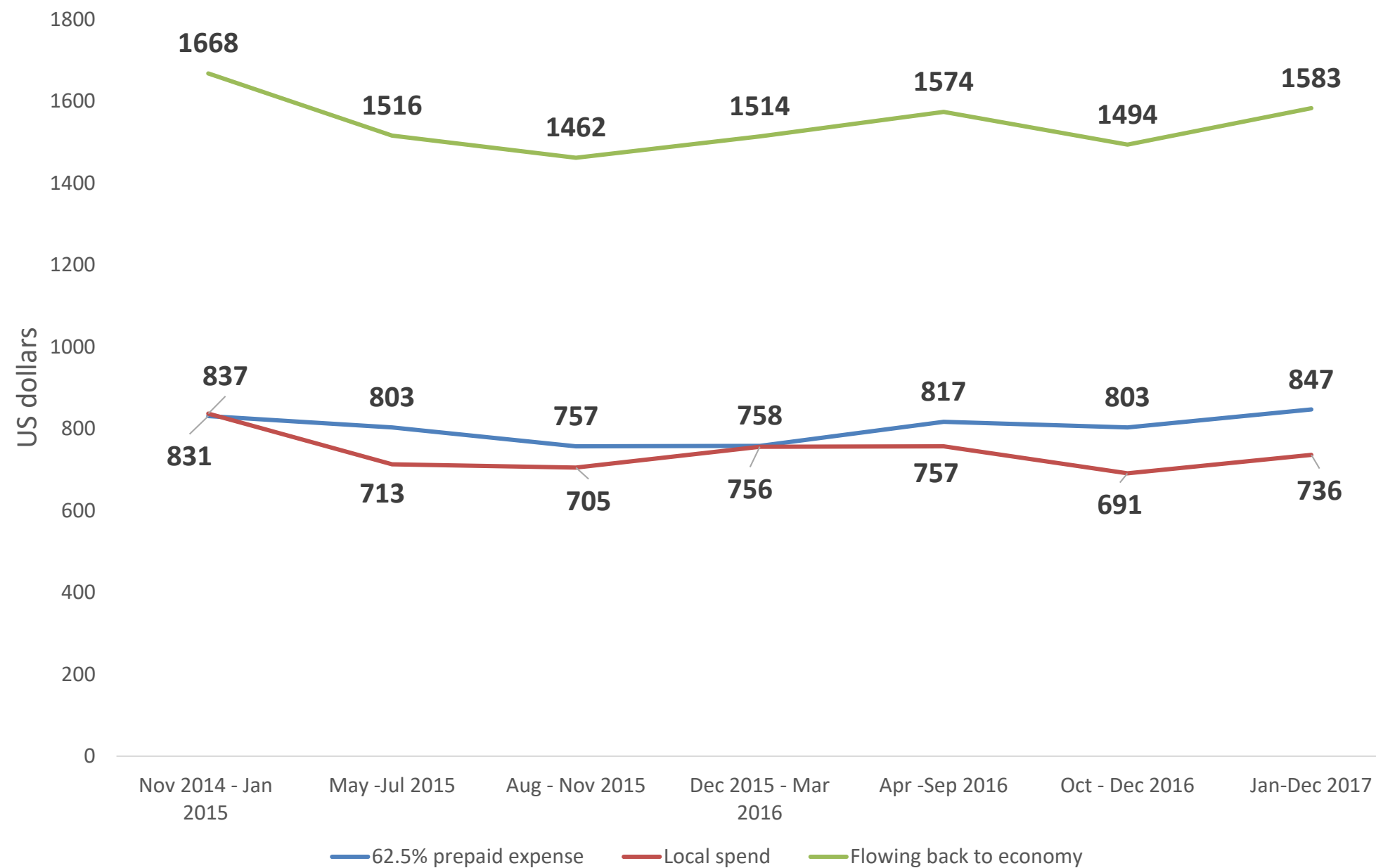


Note: the high spend for long haul is driven by the higher length of stay.

Expenditure by Market

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
Average Spend Prior to arrival						
Per Person - Whole Trip	\$1,323	\$1,306	\$877	\$1,460	\$1,876	\$1,355
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$827	\$816	\$548	\$913	\$1,173	\$847
Per Person per Day	\$98	\$95	\$86	\$125	\$130	\$105
Length of stay	8.4 nights	8.6 nights	6.4 nights	7.3 nights	9.0 nights	8.1 nights
Average Spend while in Vanuatu						
Per Person - Whole Trip	\$727	\$722	\$623	\$912	\$866	\$736
Per Person per Day	\$87	\$84	\$97	\$124	\$96	\$90
Total spend flowing into Vanuatu economy – Whole Trip	\$1,554	\$1,538	\$1,171	\$1,825	\$2,039	\$1,583
Total spend flowing into Vanuatu economy – Per Day	\$185	\$179	\$183	\$249	\$226	\$195

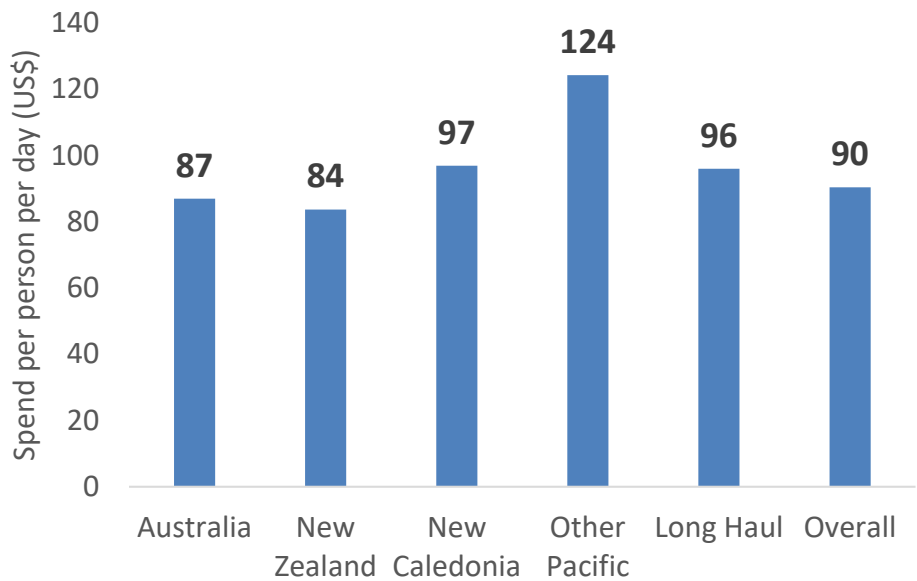
Overall Visitor Spend Time Series Trends



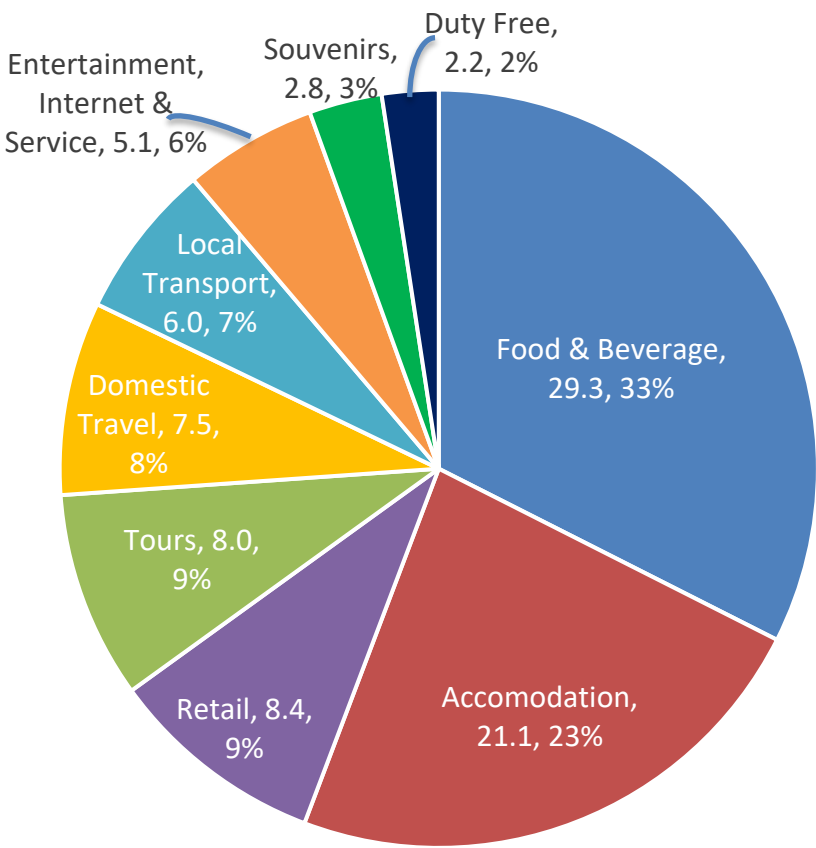
Average Spend while in Vanuatu per day

PER PERSON PER DAY

By Market

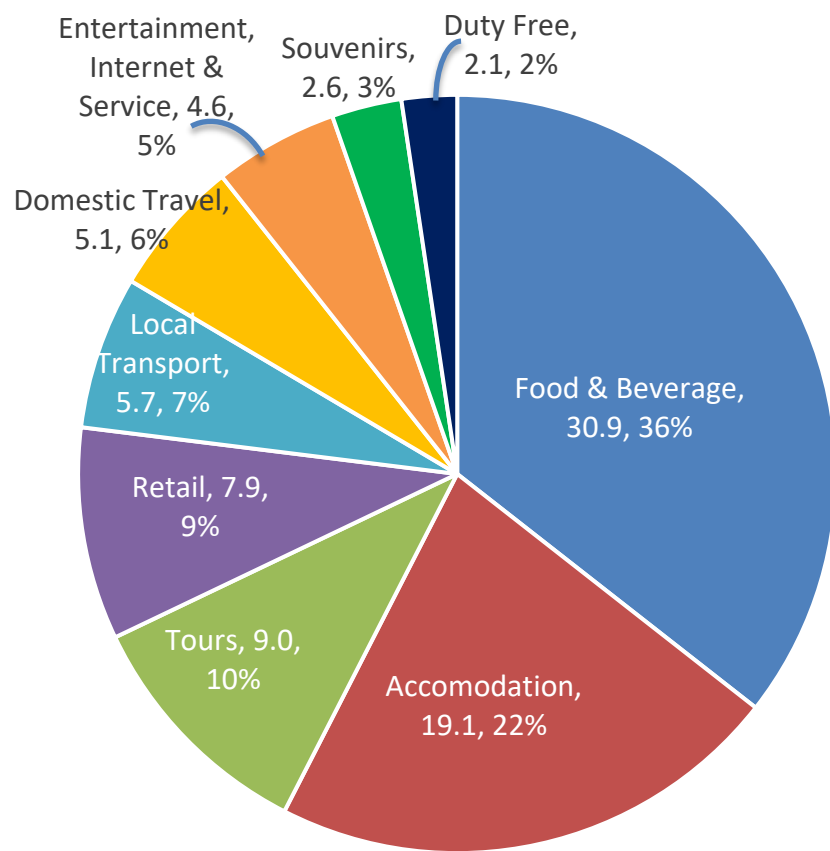


Overall - \$90 per day

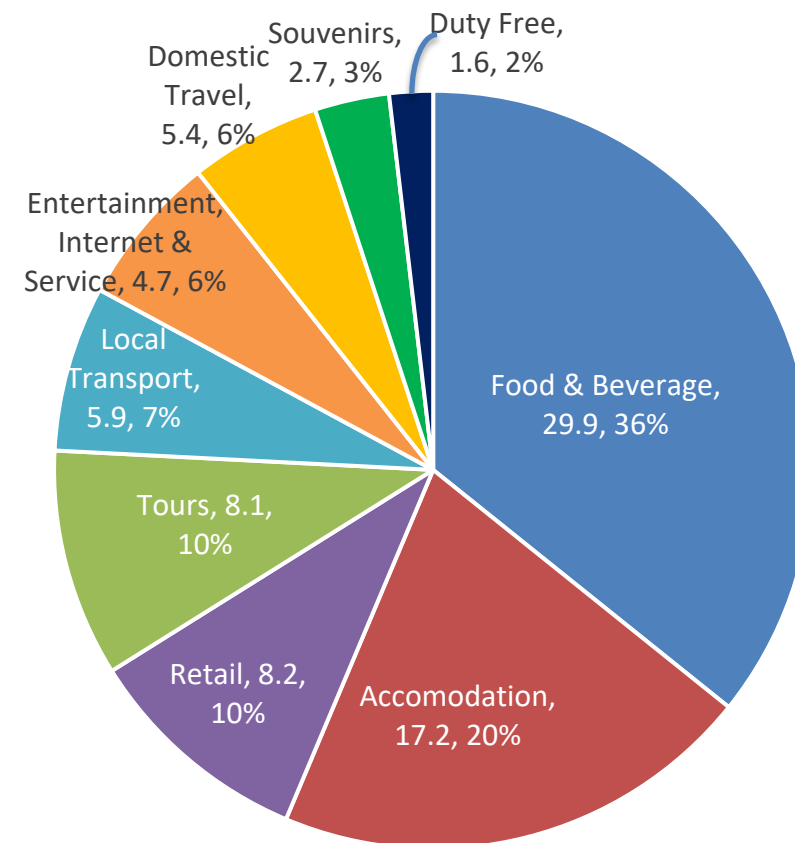


Average Spend while in Vanuatu by Market

Australia - \$87 per day

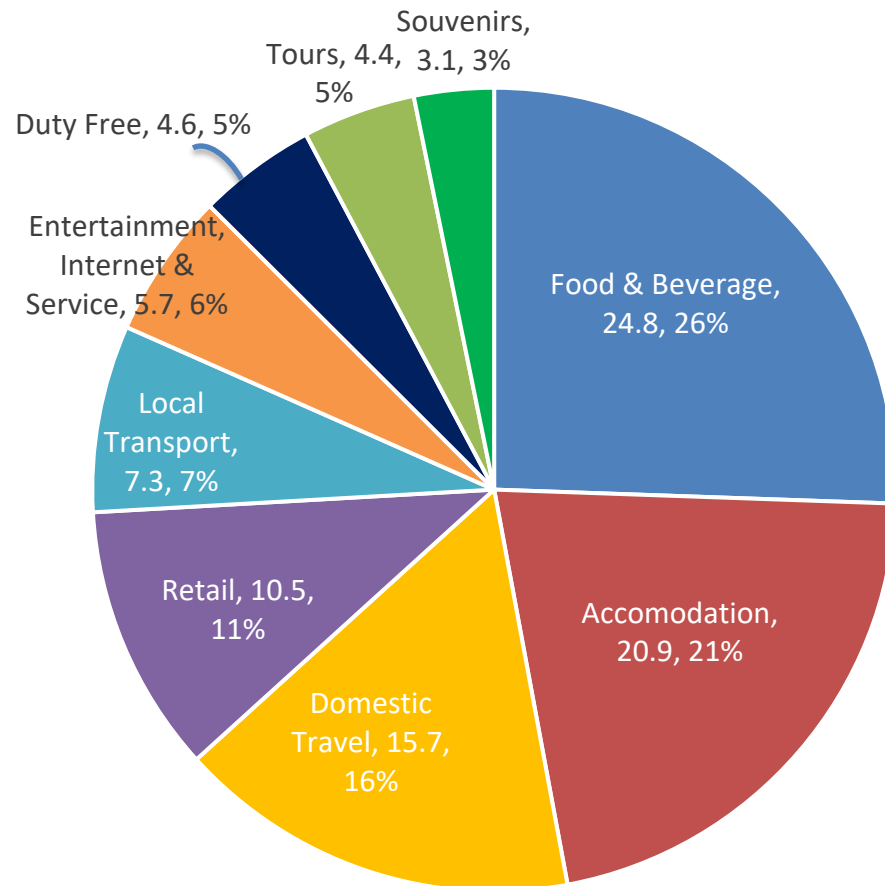


New Zealand - \$84 per day

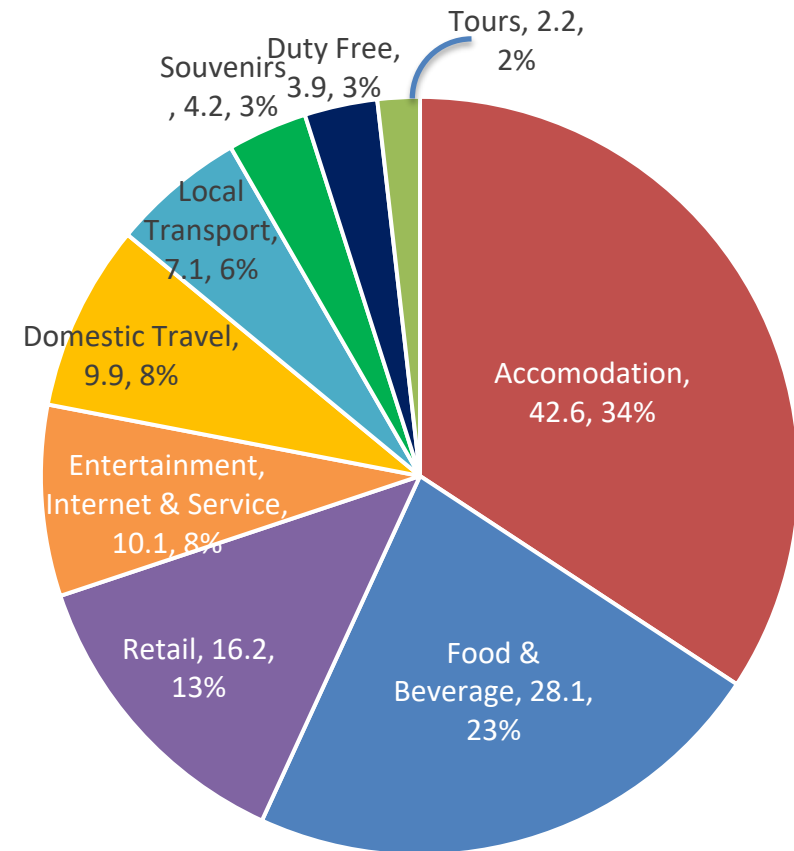


Average Spend while in Vanuatu by Market

New Caledonia - \$97 per day

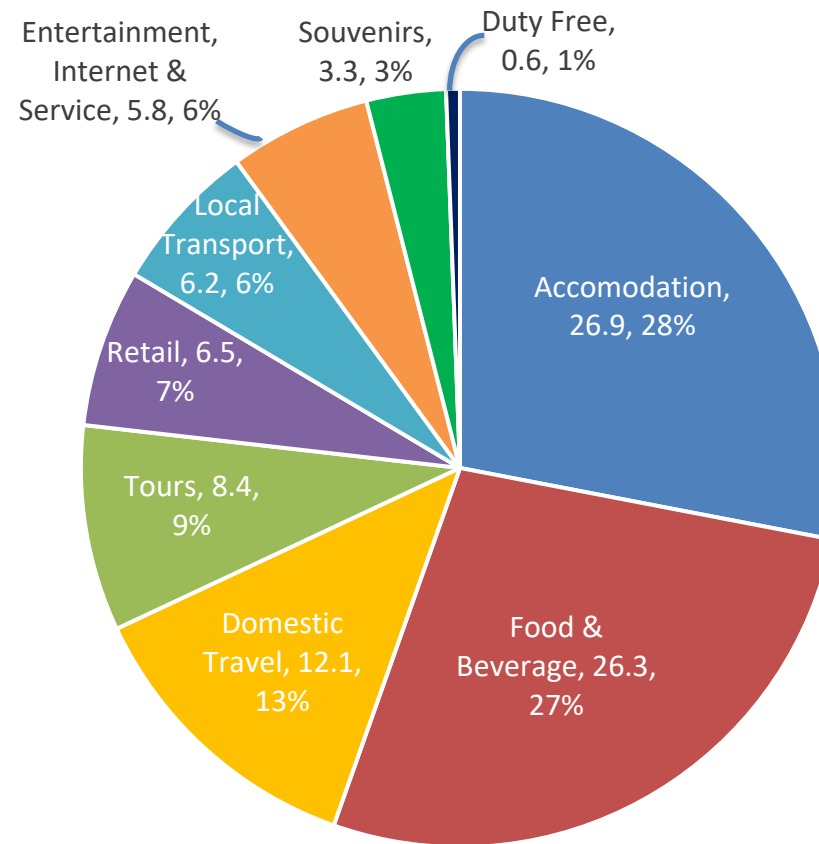


Other Pacific - \$124 per day



Average Spend while in Vanuatu by Market

Long Haul - \$96 per day



Visitor Expenditure – Per Person and Total

	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$105 Vt 11,302		US\$90 Vt 9,729		US\$195 Vt 21,031
Whole Trip	US\$847 Vt 91,544		US\$736 Vt 79,559		US\$1,583 Vt 171,103

Direct economic impact on Vanuatu for Jan-Dec 2017

US\$172.7 million / Vt 18.7 billion in total

US\$14.4 million/ Vt 1.55 billion per month

Visitor Expenditure – comparison 2016 and 2017

2016

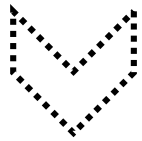
**TOTAL
CONTRIBUTION
PER PERSON
PER VISIT**

US\$1,526

×

VISITOR ARRIVALS

95,117



**US\$145.2
Million**

2017

**TOTAL
CONTRIBUTION
PER PERSON
PER VISIT**

US\$1,583

×

VISITOR ARRIVALS

109,108

**US\$172.7
Million**

+ 3.7%

+ 14.7%

+ 18.9%

Presentation Structure



Information Sources and Decision Making

How did you find out about Vanuatu?



38%	Friends and Family
29%	Previous Visits
13%	General Websites

How did you purchase your travel?



55%	By Myself
25%	Travel Agent

What influenced your decision making?



3.7/5 Quiet and relaxing atmosphere



3.5/5 Nature attractions



3.4/5 Beaches and swimming



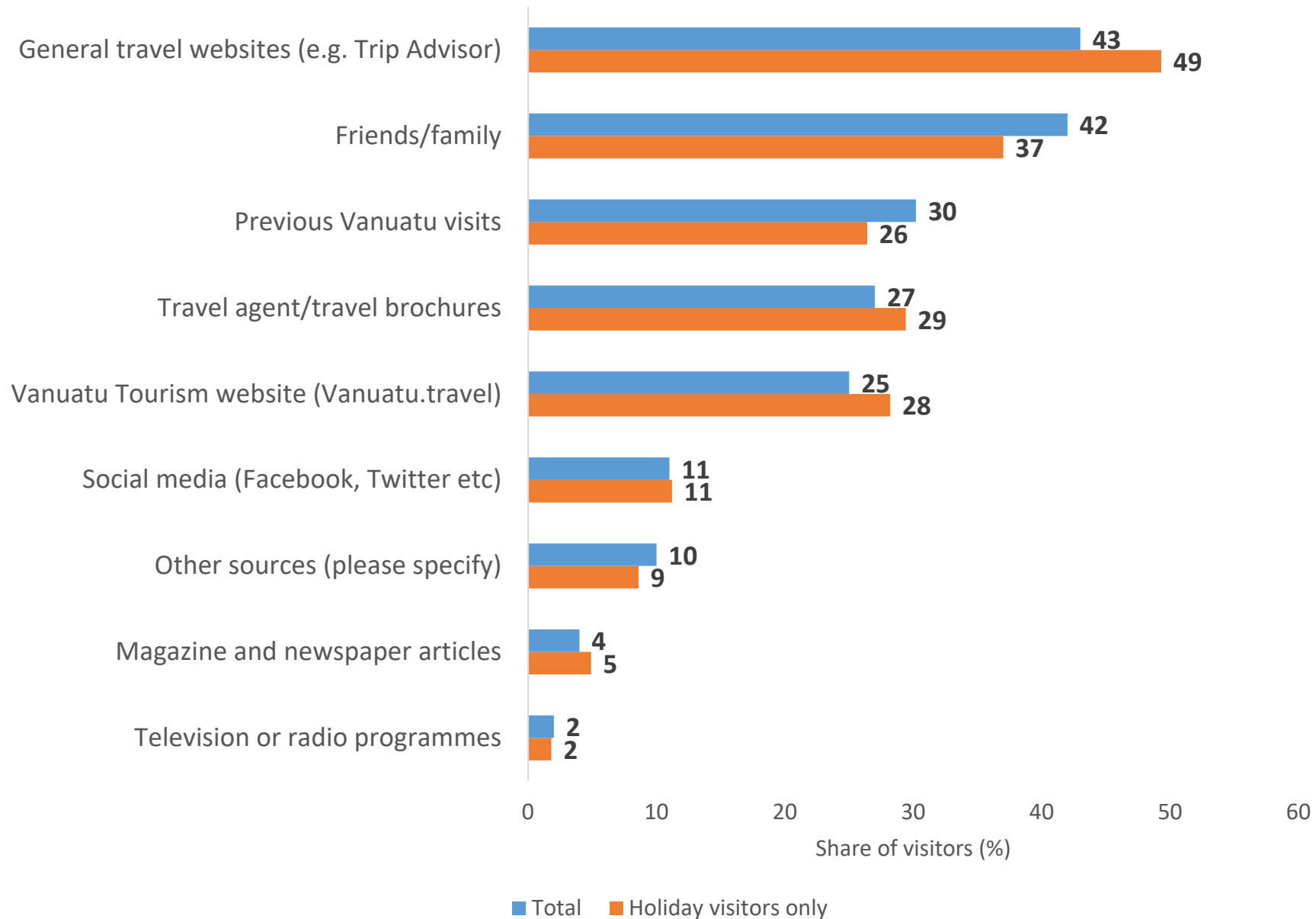
Information Sources for Planning

43%	General Travel Websites
42%	Friends and Family
30%	Previous Visits
27%	Travel Agent/Travel Brochures

Influences on the decision to choose Vanuatu

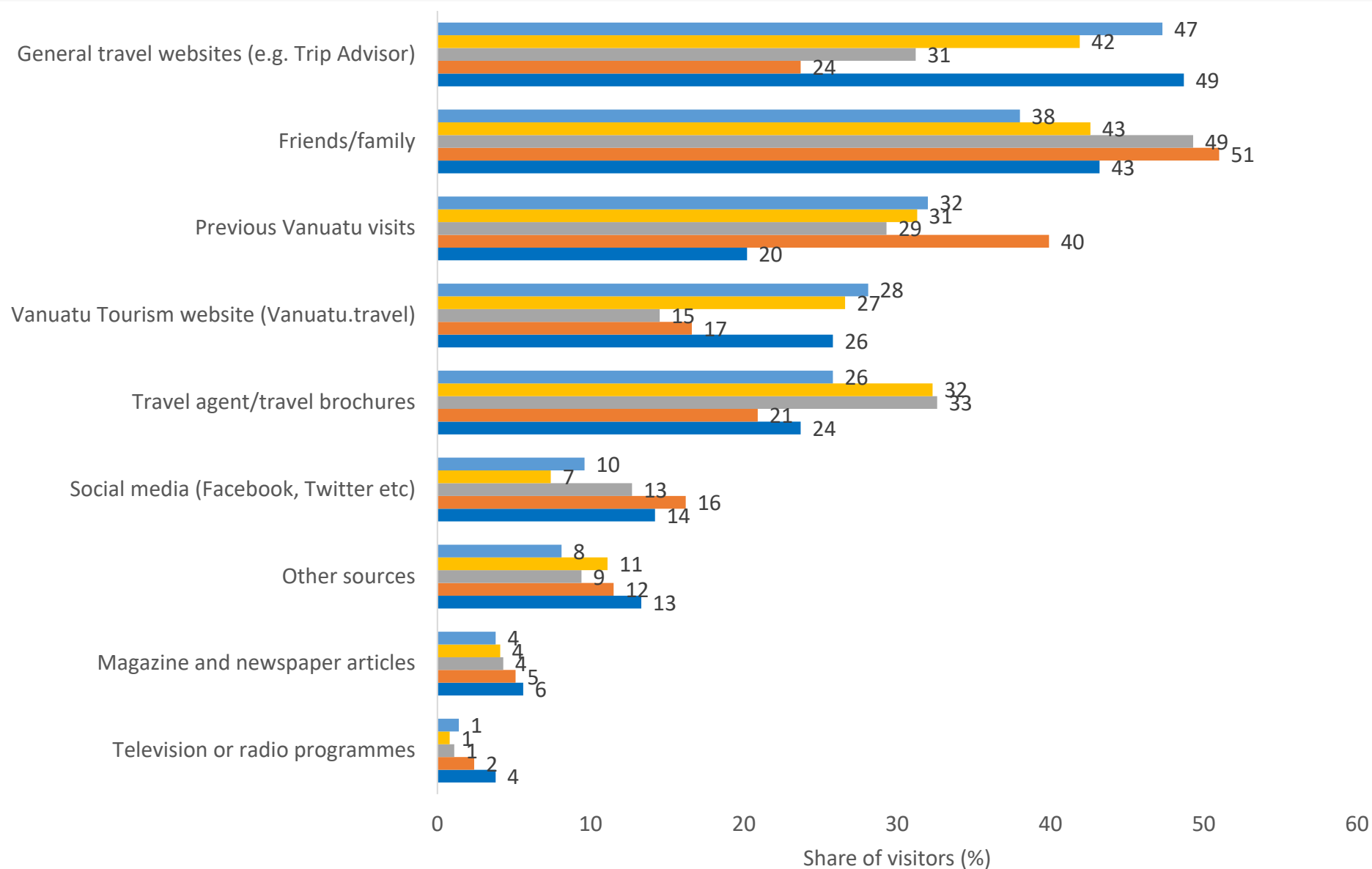
Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Quiet and relaxing atmosphere 3.9	Beaches and swimming 3.6	Accessible 3.6	Snorkelling and diving 3.4
New Zealand	Quiet and relaxing atmosphere 3.6	Beaches and swimming 3.6	Snorkeling and diving 3.3	Affordable 3.3
New Caledonia	Natural attractions/ volcano/ Ecotourism 3.8	Affordable 3.7	Accessible 3.7	Quiet and relaxing atmosphere 3.6
Other Pacific	Business or conference 3.7	Quiet and relaxing atmosphere 3.4	Accessible 3.4	Friends and family in Vanuatu 3.3
Long Haul	Natural attractions/ volcano/ Ecotourism 3.9	Culture and History 3.5	Beaches and swimming 3.3	Quiet and relaxing atmosphere 3.2

Sources Used for Planning - Holiday



Note: Multiple responses, therefore total does not add up to 100%

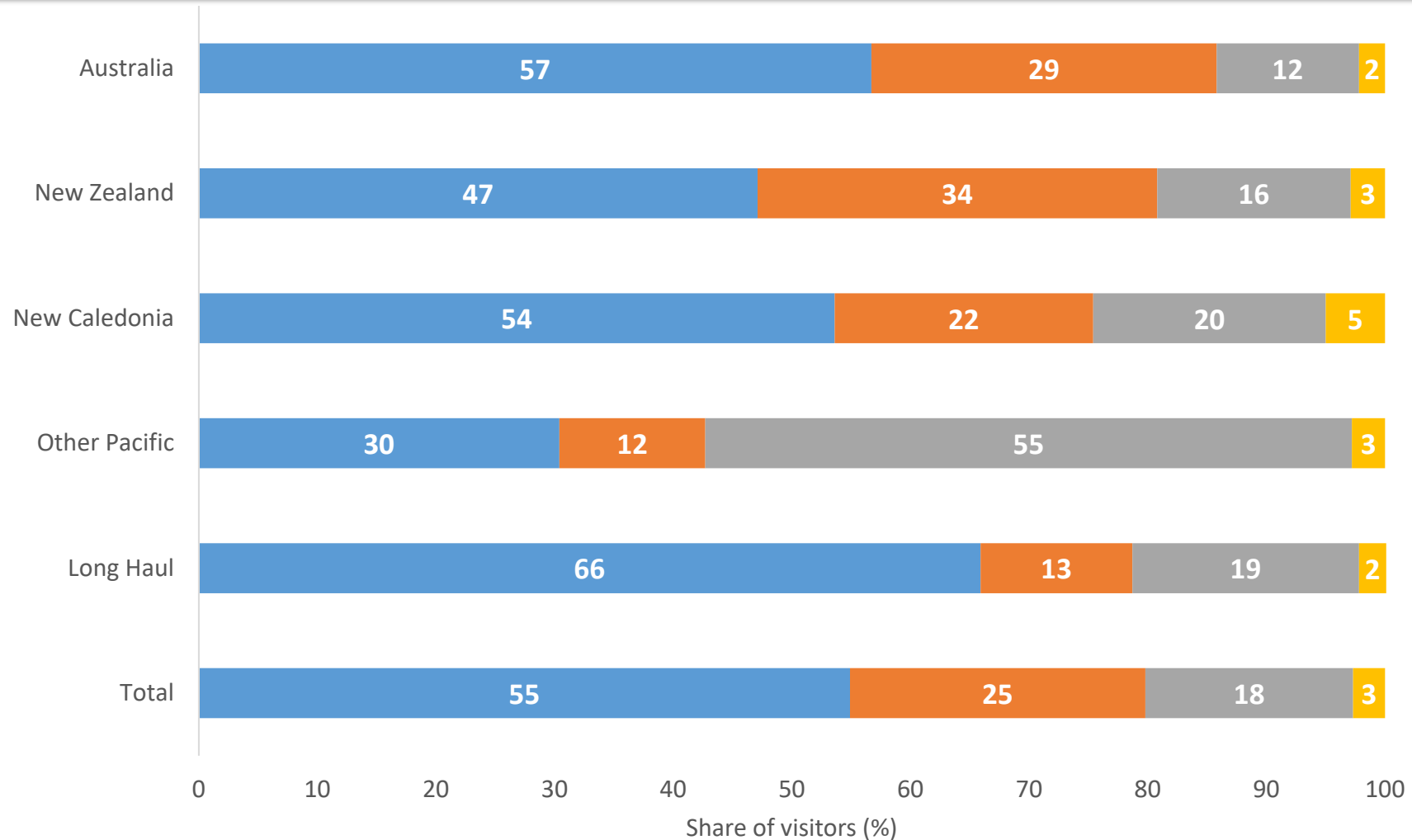
Sources Used for Planning – Market



Note: Multiple responses, therefore total does not add up to 100%

■ Australia
 ■ New Zealand
 ■ New Caledonia
 ■ Other Pacific
 ■ Long Haul

Travel Purchasing Behaviour by Market



■ I made my own travel arrangement (through online website or booked with hotels/airlines)

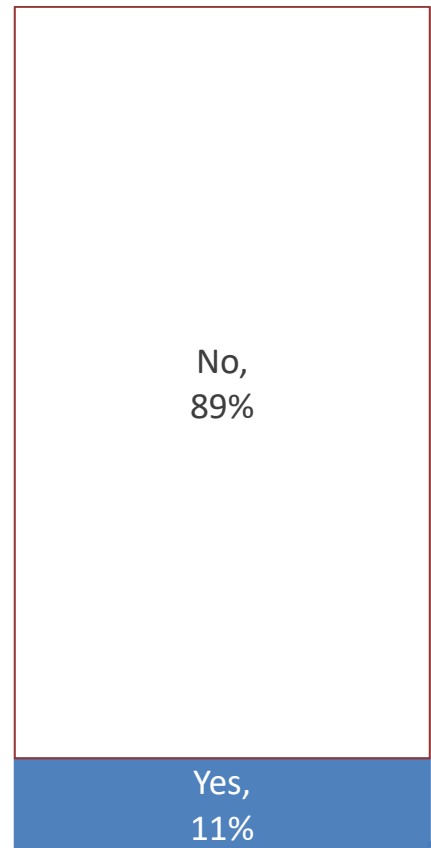
■ I purchased a pre-paid travel package through a travel agent

■ Travel arrangements were made by others (business, friends, relatives)

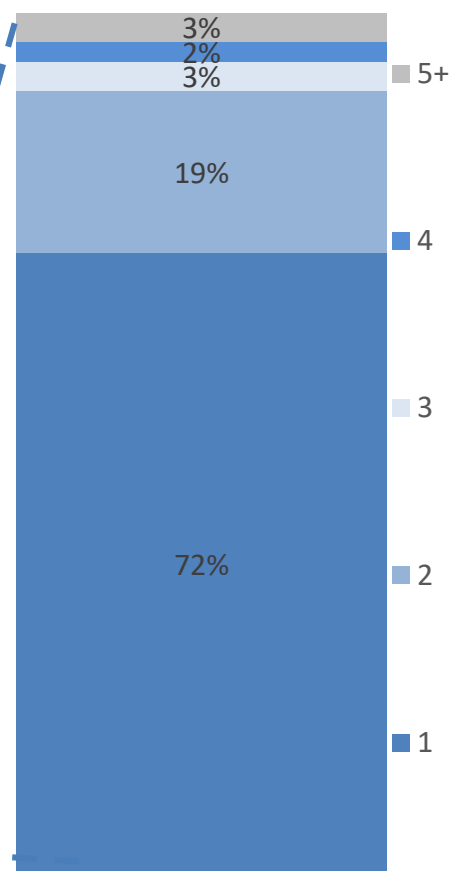
■ Other

Cruise visits to Vanuatu for holiday visitors only

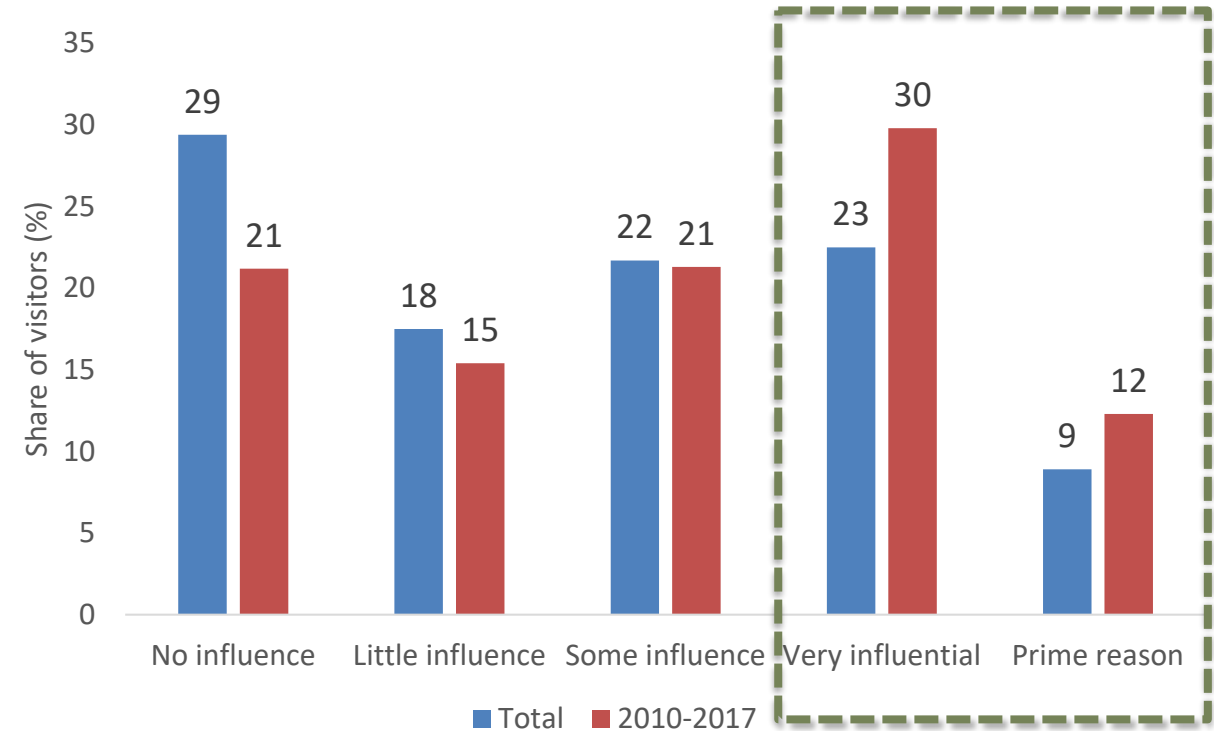
Been on a cruise to Vanuatu before?



If Yes, how many times?



Did cruising before influence your decision to come back?



Presentation Structure



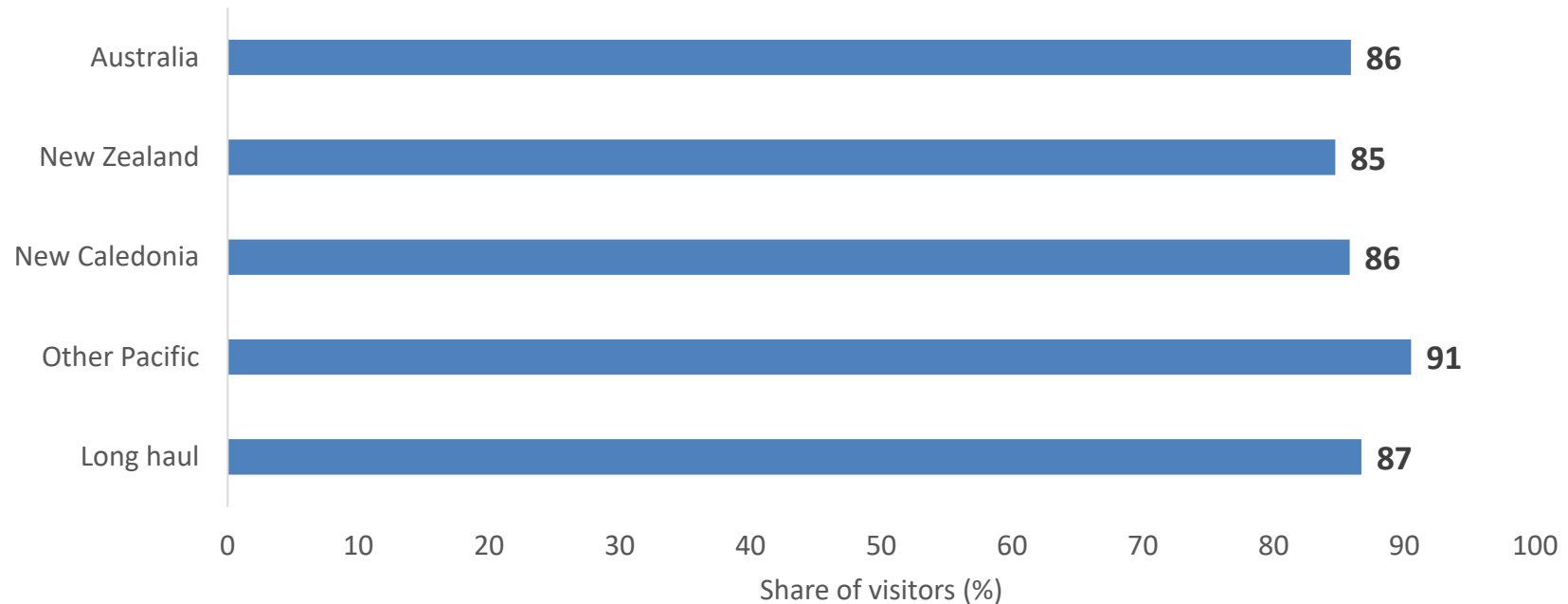
Visitor Satisfaction

Overall Satisfaction*

86% Total visitors satisfied

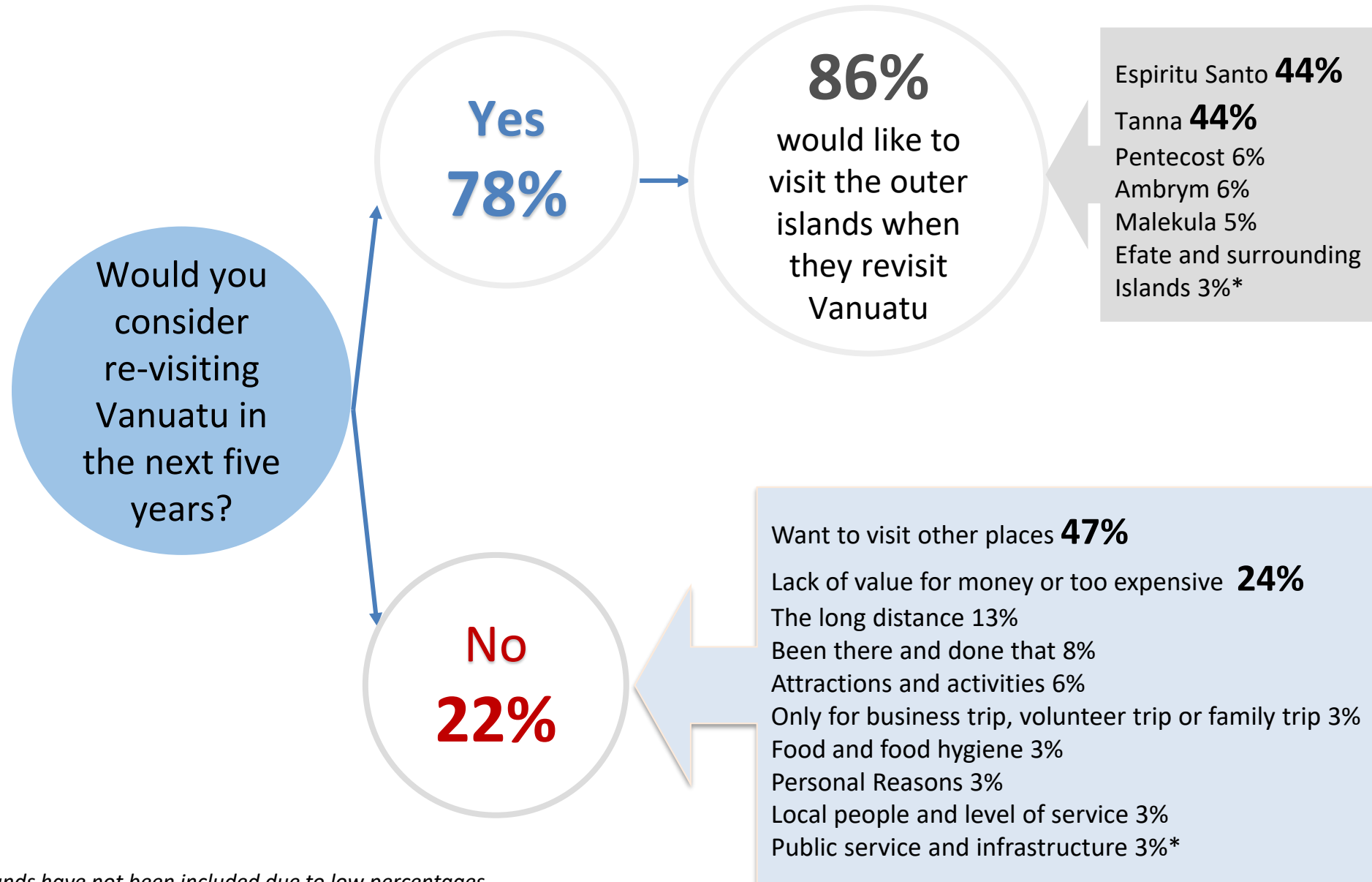
87% Holiday visitors satisfied

Satisfaction by Market



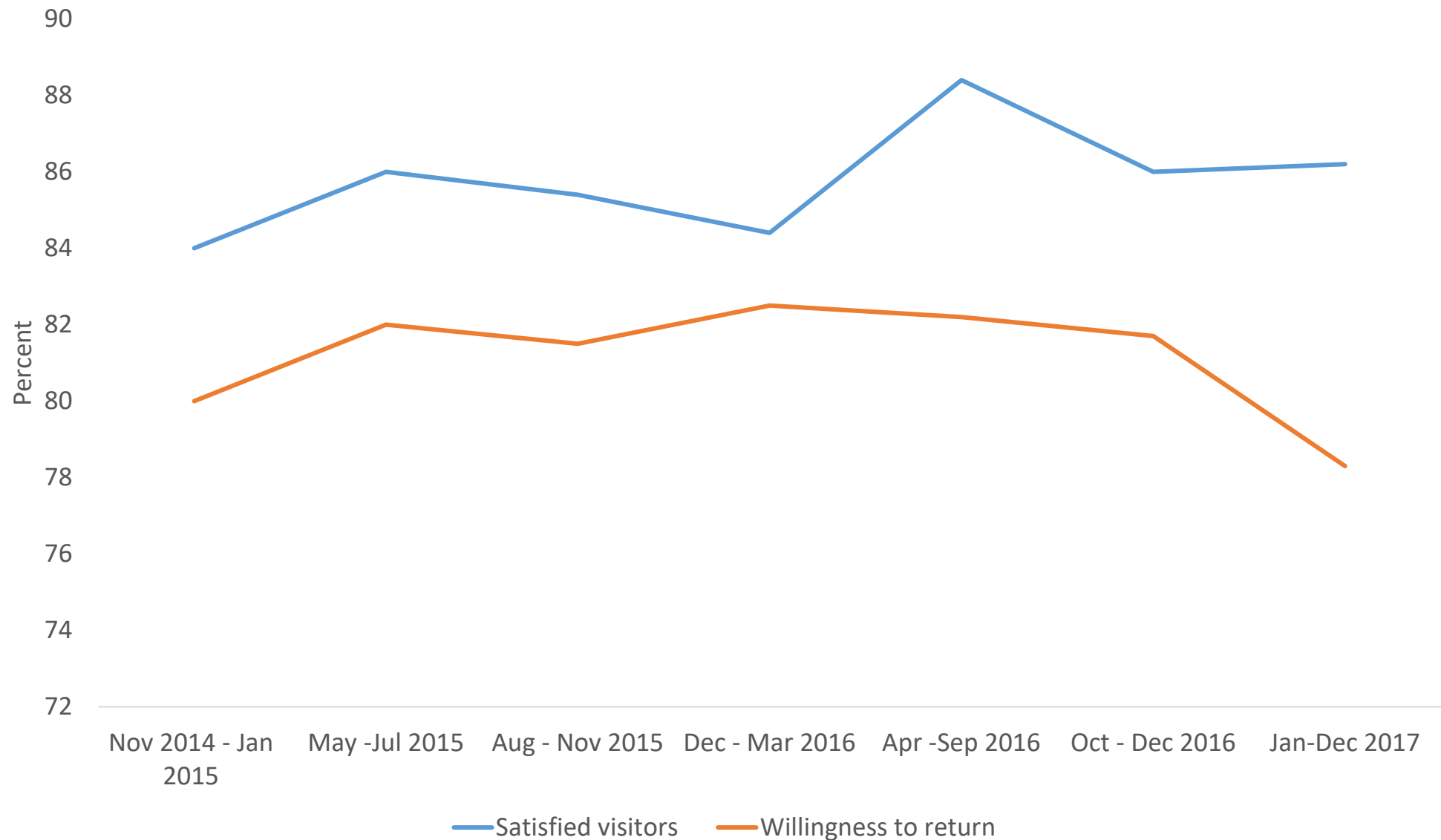
* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

Willingness to Return



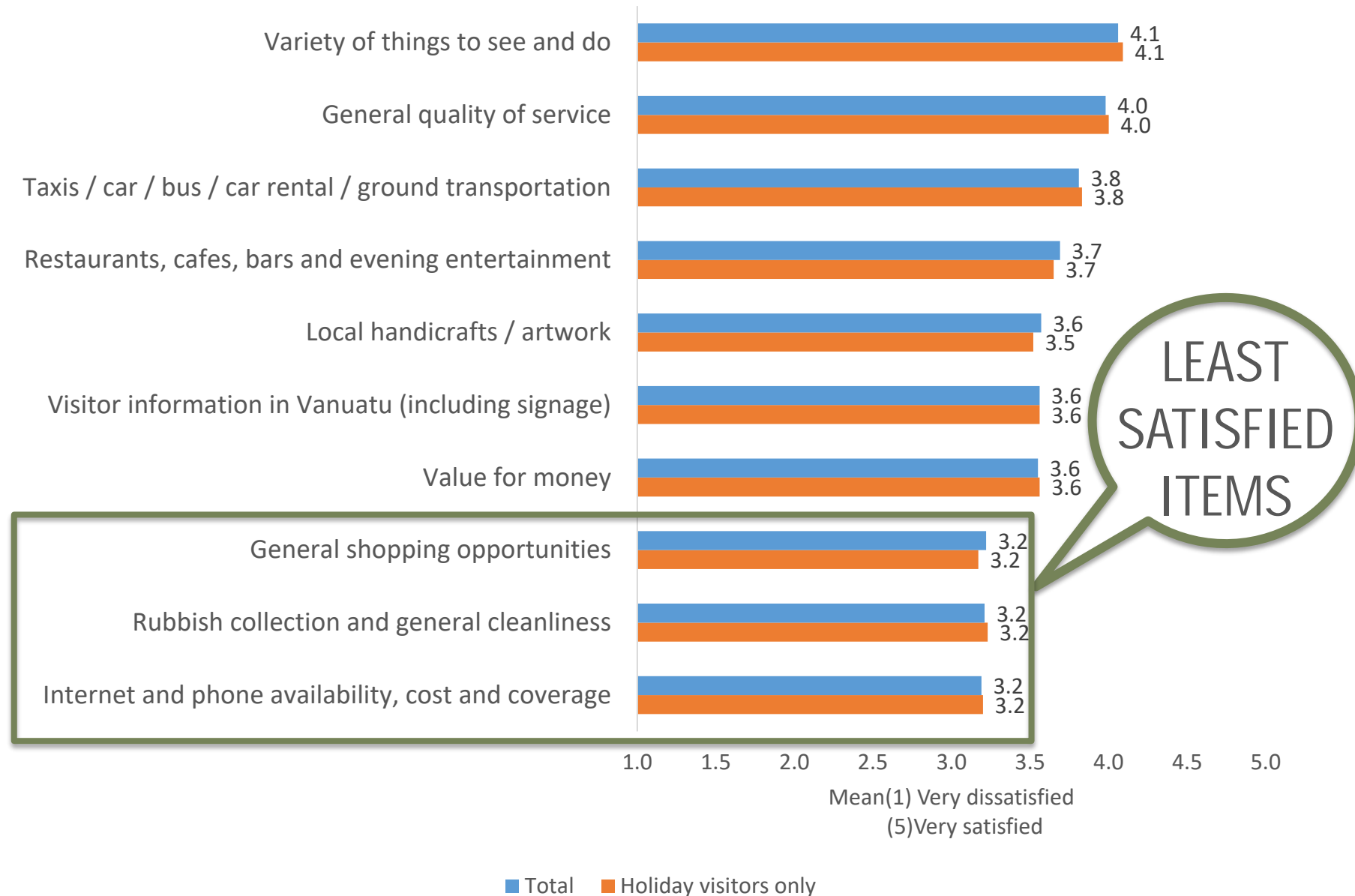
* Other reasons/Islands have not been included due to low percentages

Willingness to Return and Satisfaction

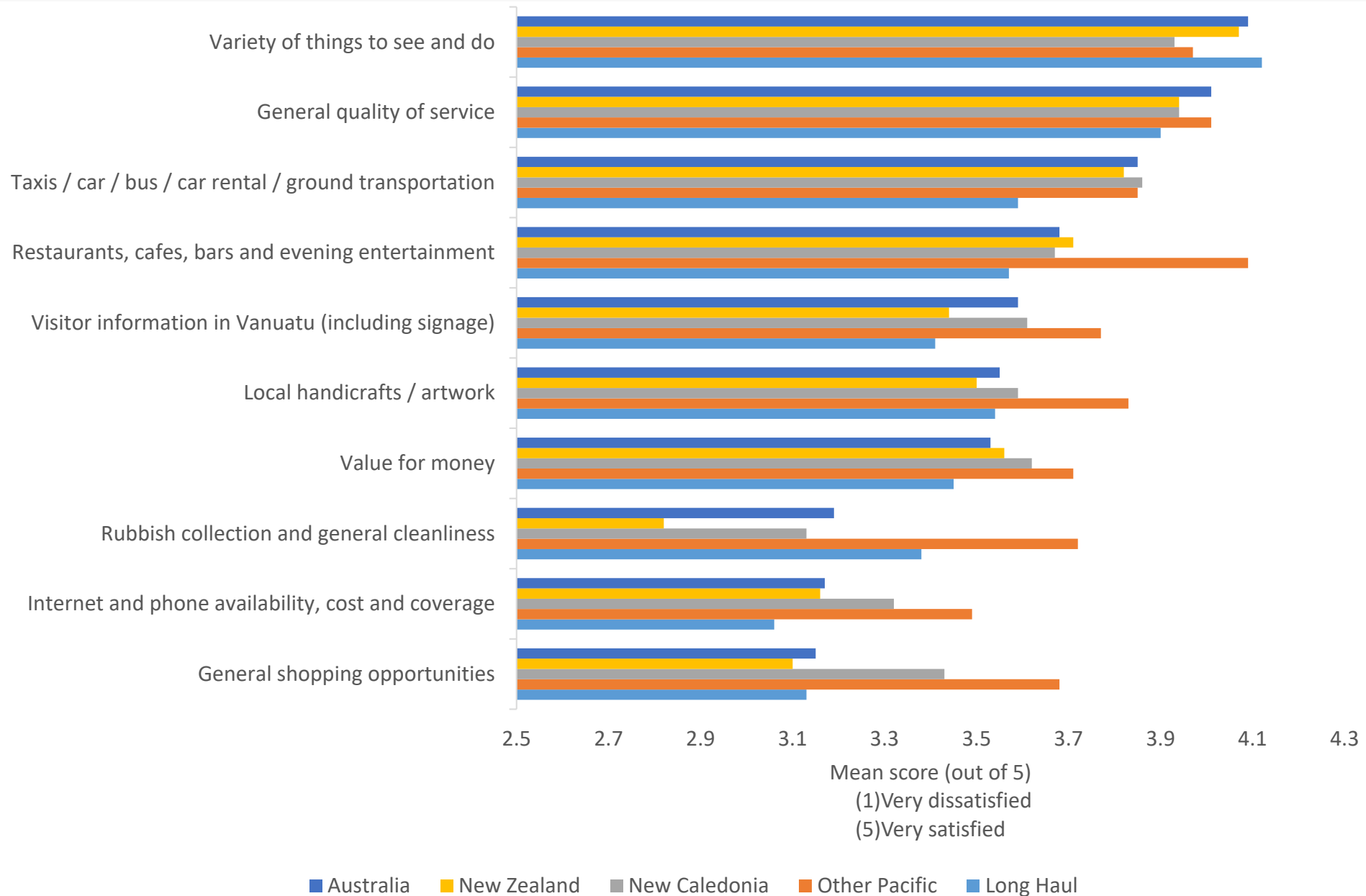


* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

Degree of Satisfaction – Total VS Holiday Visitors



Degree of satisfaction – Market



Most Appealing Aspects	
Themes	Percent
Local people	48.5%
Activities attractions and entertainment events	32.4%
Environment	30.9%
Atmosphere	15.7%
Food and Beverage	6.8%
Accommodation	6.3%
Culture and history	6.0%
Level of service	4.9%
Convenience	4.4%
Overall good experience	3.2%
Safety	2.6%
New Developments	1.7%
Uncommercial	1.6%
Value for money	0.6%
Cyclone recovery aid	0.3%

Most Appealing Aspects of Vanuatu

“The tranquillity, the unspoilt natural beauty, the chance to learn about Ni-Van culture and life by doing some community-owned tours.”

“The snorkelling, the beautiful beaches, the beautiful fresh fruit and vegetables at the markets. We were also amazed by how kind and friendly people were to us.”

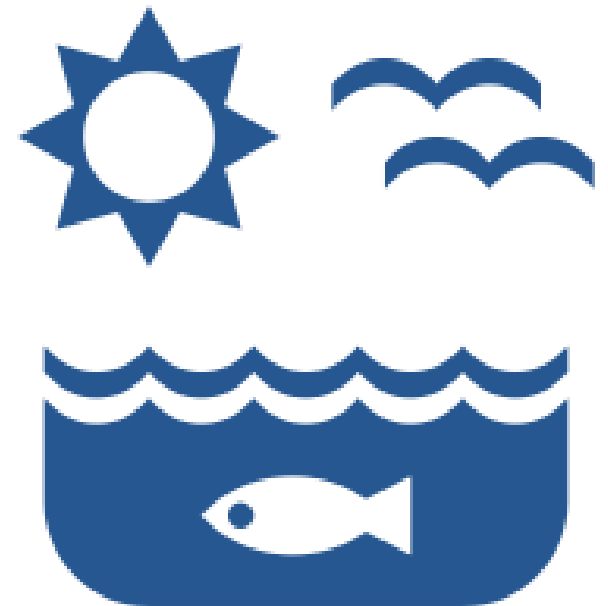
“The kindness and friendliness of all the people. The beauty and uniqueness of the island scenery. The interesting stories of the past history, the wartime memories and history. The opportunities to join in activities like exploring, fishing, the variety of shopping and restaurants. The excellent selection of accommodation places available.”



Most Appealing Aspects of Vanuatu

"The improvements in the service and all round appearance of the country...There was always lots of rubbish everywhere and the smell of decomposing food was in the air but there has been a major change in that. The island of Efate looks a lot better. The local market was full of beautiful fresh produce... It was a pleasure to shop there. The local people themselves seem to be much happier and are involved in establishing their own businesses.

"The pristine natural beauty. Volcanoes, blue caves and waterfalls. Unlike any landscape I've ever seen. It is a place that has stayed with me long after I've left."

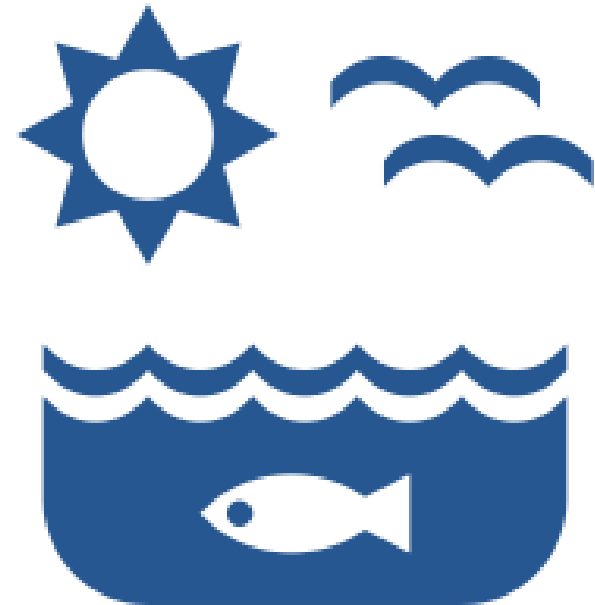


Waterfront Re-development

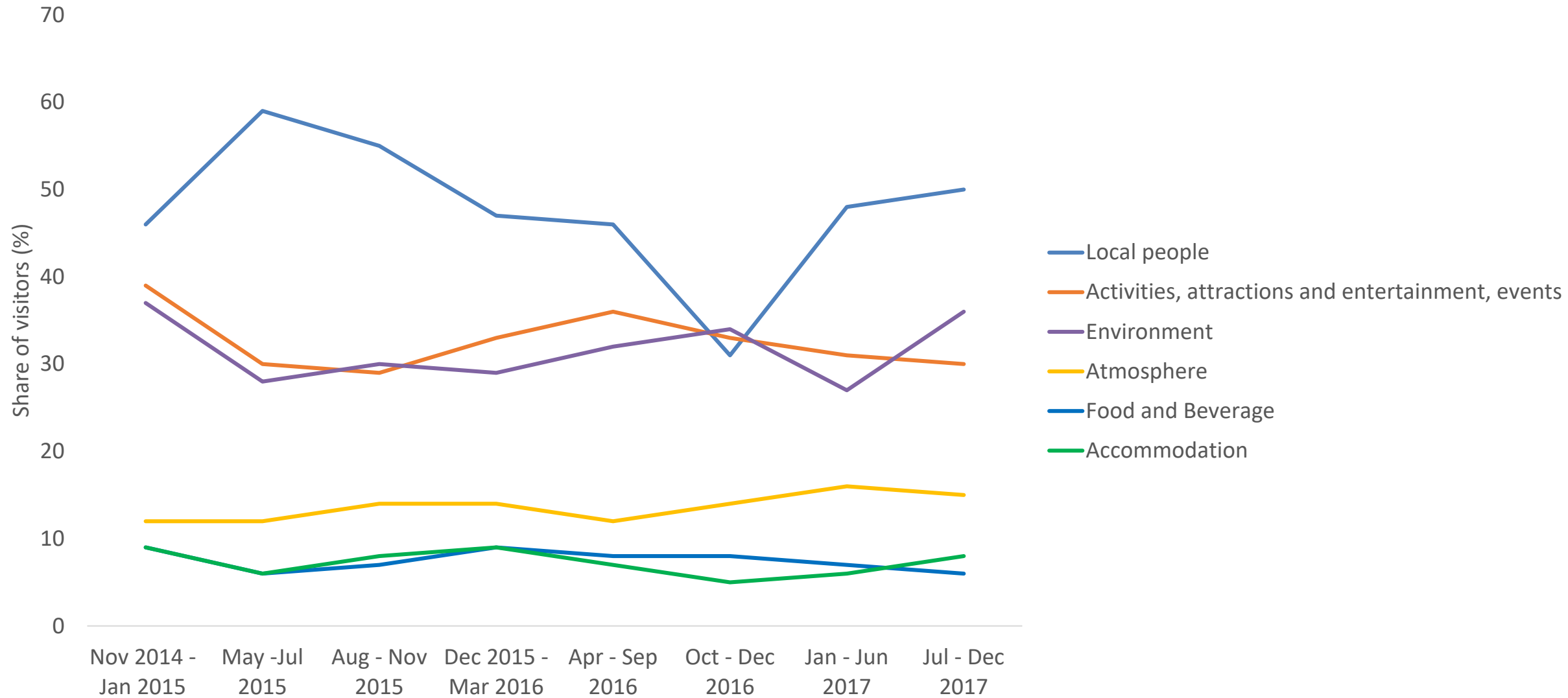
“The new walkway from Chantilly's to the Market is absolutely wonderful. It is a wonderful asset and we were so lucky to be present for the opening. Great to see money from NZ being used for something that everyone can use.”

“The amazing new infrastructure around the waterfront in Vila”

“The waterfront area has been given a major make over and looks fantastic”



Most appealing items



Least Appealing Aspects	
Themes	Percent
Public services facilities and infrastructure	38.7%
Rubbish cleanliness and natural environment care	18.7%
Price of goods and services	14.4%
Food and beverage	12.0%
Attractions and activities	10.9%
Port Vila	7.7%
Local people standard of service	7.3%
Social divide and social issues	6.8%
Shops and the shopping experience	6.6%
Accommodation	6.0%
Bus rental cars scooters or transport	6.0%
Flight related issues	3.4%
Weather	3.0%
Stray animals and mosquitos diseases	2.7%
Safety related issues	2.0%
Cruise ships	1.9%
Too touristy	1.4%
Other tourists	0.6%
Cyclone	0.5%

Least Appealing Aspects of Vanuatu

“Expensive to travel to other islands. Food was expensive. Coral getting damaged by tourists. The local people not receiving the benefits. Cruise ships don't seem to benefit the country.”



“The pollution and rubbish everywhere, including the ocean and beaches. The roads are terrible. Way too many unroadworthy unregistered taxis on the road. Tighter laws needed with annual vehicle inspections and registration.”

Least Appealing Aspects of Vanuatu

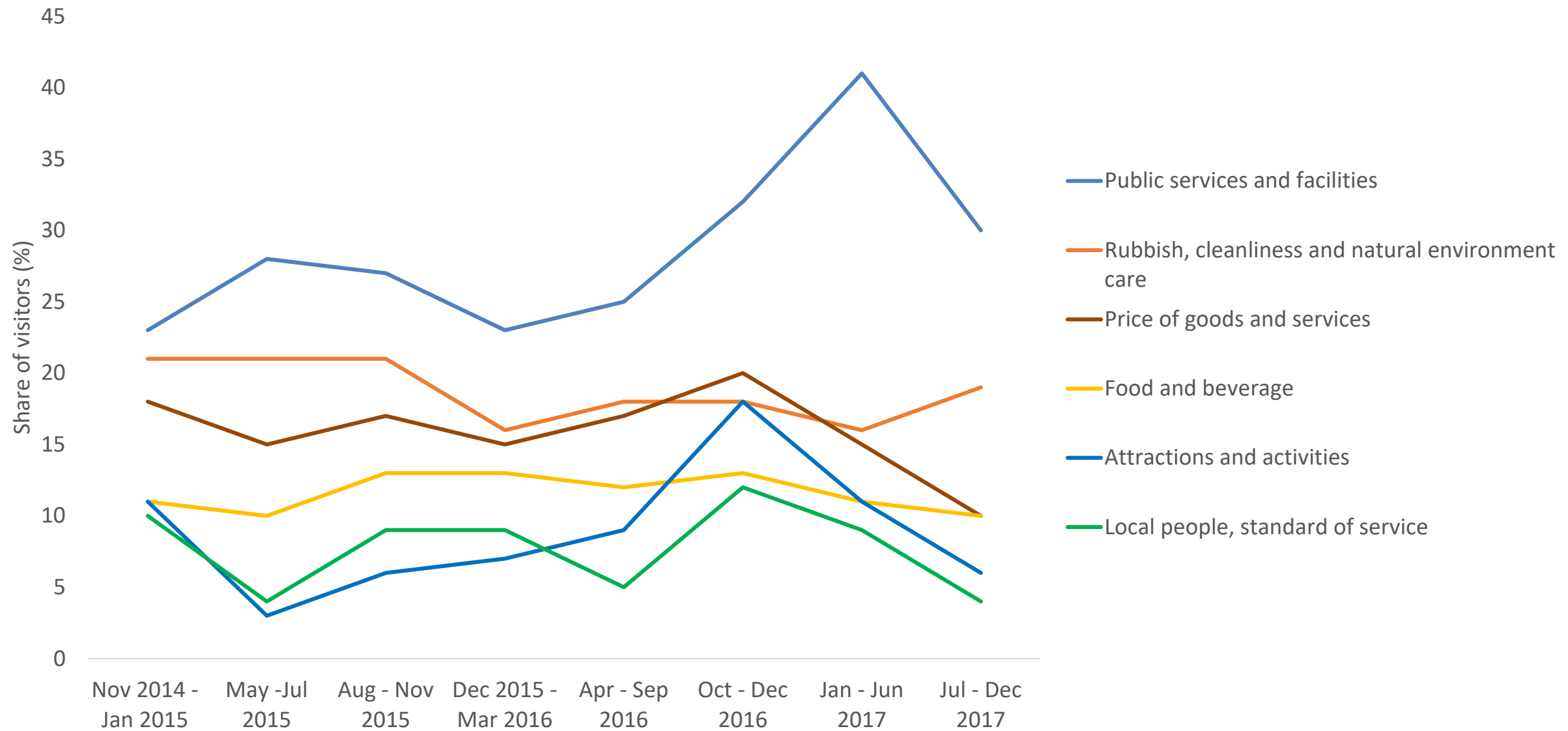
"Roads need to be fixed, cleaning needs to be done."

"We felt the cost of food and drinks were very high and to see so many poor people and bad infrastructure it made us sad to wonder who is benefiting from the huge money made by this."

"Port Vila was very disappointing, it was not as nice as our last trip. Port Vila itself was dirty and uninviting."

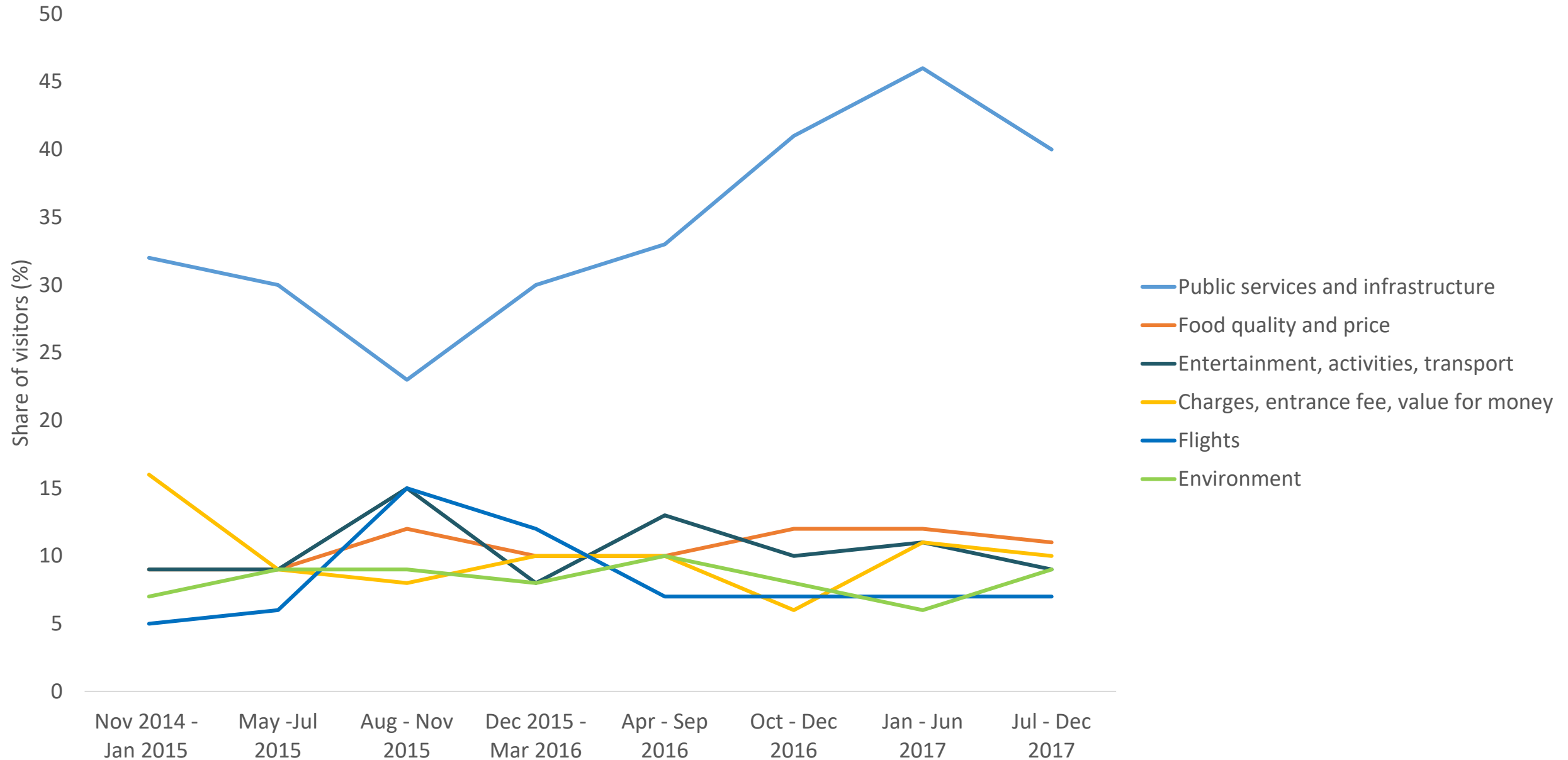


Least appealing items



Suggestions for Improvement	
Themes	Percent
Public services and infrastructure	45.4%
Food quality and price	12.3%
Charges entrance fee value for money	11.4%
Entertainment activities transport	8.8%
Environment (cleanness rubbish nature)	7.9%
Accommodation	7.8%
Local people, standards of service	7.7%
Flight related issues	7.3%
Shopping experience	4.2%
Weather	2.9%
Social issues	2.3%
Safety	1.8%
Sickness	1.2%
Cruise tourists	0.4%
Stray and endangered animals	0.2%

Suggestions for improvement





THANK YOU

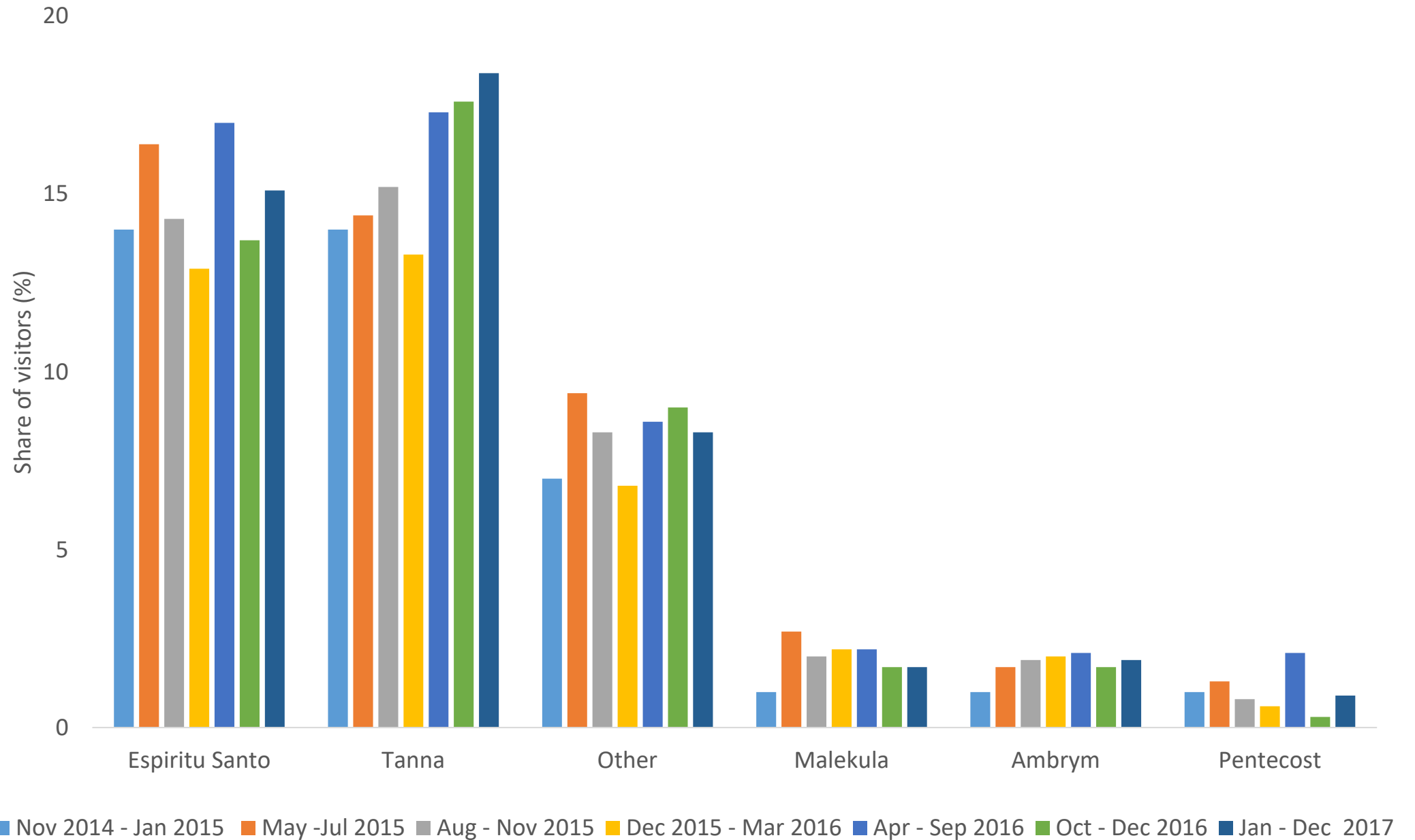


Simon Milne
simon.milne@aut.ac.nz

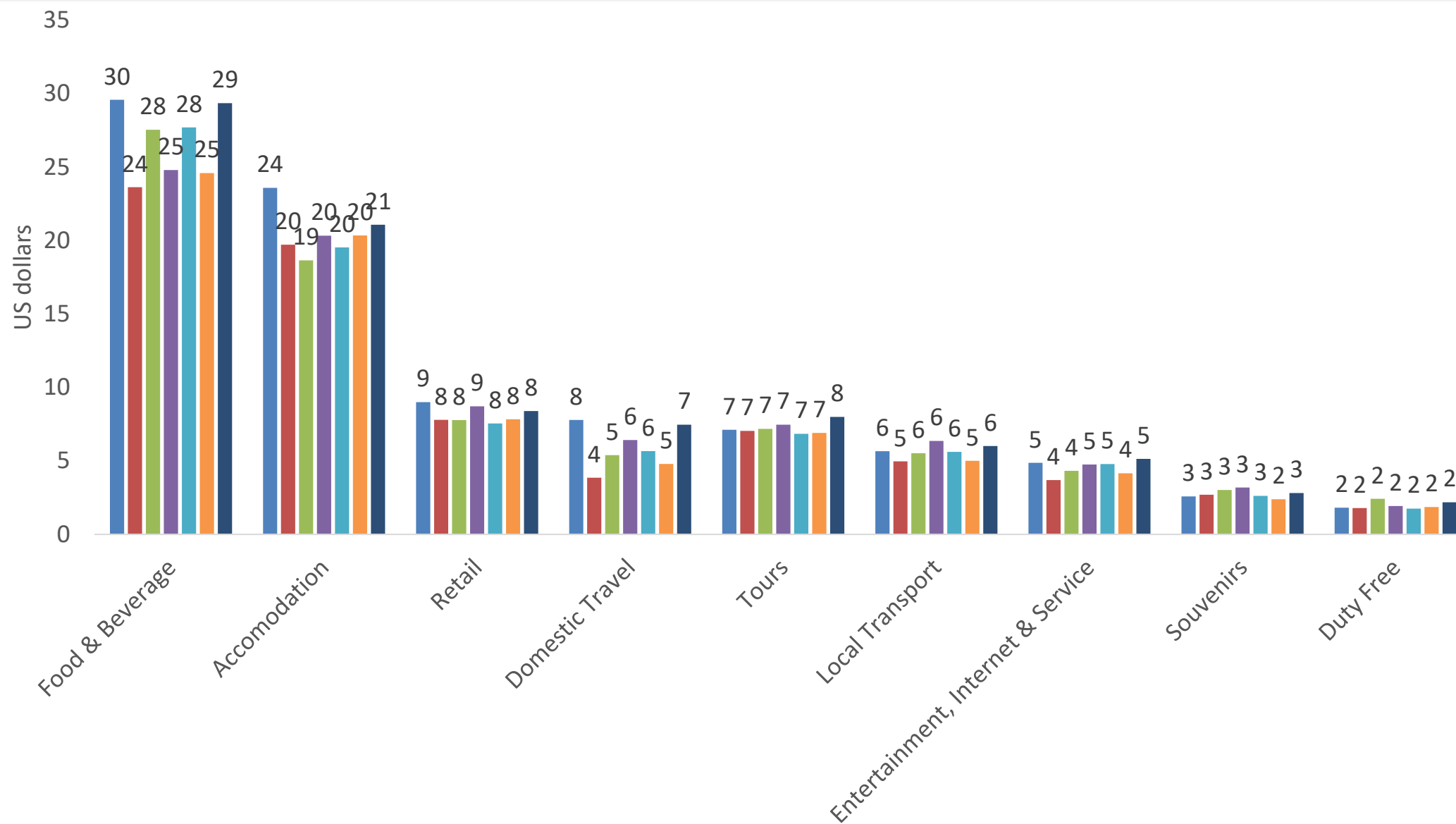
www.nztri.org.nz

Authors: Simon Milne, Sam Li, Mindy Sun, Karin Malacarne, Dinesha Gedara, Michelle Hunt

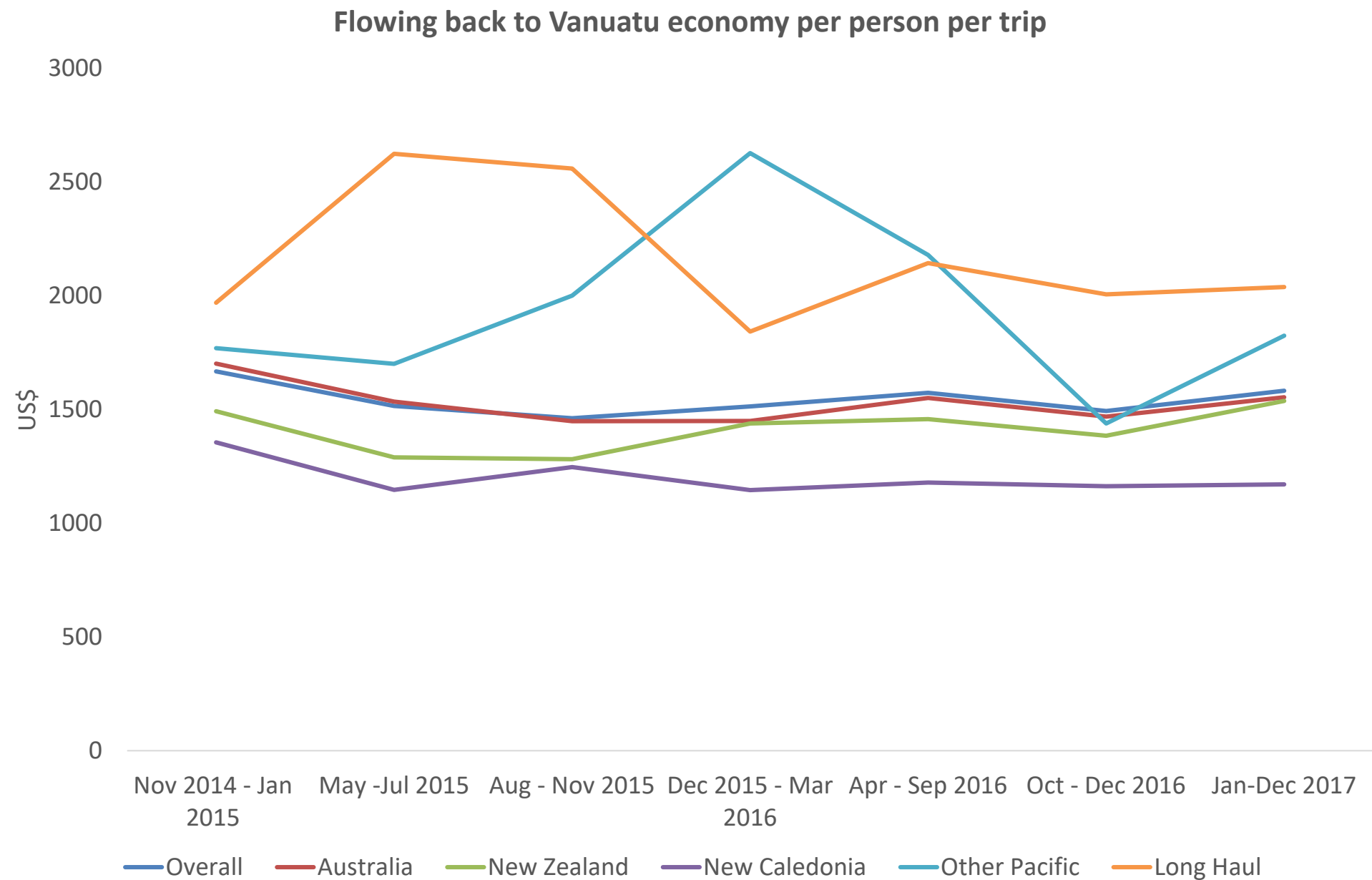
Islands Visited – Time Series



Average Spend while in Vanuatu by Market



Economic Impact (Per Trip) By Market



Average Spend while in Vanuatu per day

PER PERSON PER DAY- TIME SERIES

