

# VANUATU INTERNATIONAL VISITOR SURVEY

# IVS INSIGHTS AND COVID RESPONSES

July –September 2022 Visitors

# Background

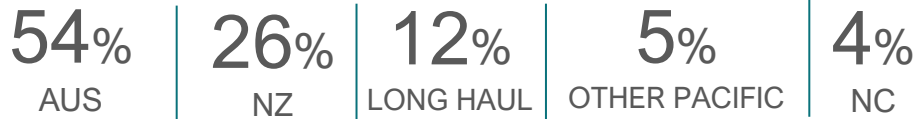
- IVS data from July to September 2022 are analysed to help us understand the visitor experience and gain insights into tourism recovery after the border reopening.
- Key results include visitor profile and characteristics, decision-making, spending, satisfaction as well as COVID-19 responses.
- Note: All analyses were conducted based on the IVS responses data, which are unweighted due to missing September 2022 arrival data.
- All reports from the IVS are available at the [Pacific Tourism Data Initiative Resource Page](#)

## SUMMARY OF KEY FINDINGS 2019 vs. 2022

# Jul-Sep 2019



### COUNTRY OF ORIGIN



7%  
Visitors are 70 years old or over.



3 ppl  
Avg. number of travel companions.



56%  
Visitors visited for the first time.



\$76,505  
Average household income.

Note: US dollars.

# Jul-Sep 2022



### COUNTRY OF ORIGIN



13% ▲  
Visitors are 70 years old or over.



2 ppl ▼  
Avg. number of travel companions.



49% ▼  
Visitors visited for the first time.



\$91,669 ▲  
Average household income.

\*N.B. Results for 2022 IVS are unweighted

## SUMMARY OF KEY FINDINGS 2019 vs. 2022

# Jul-Sep 2019



### PURPOSE OF VISIT



4.3/5

Overall, visitors are very satisfied.



94%

Visitors are willing to recommend.



79%

Visitors are willing to return.

# Jul-Sep 2022



### PURPOSE OF VISIT



4.3/5

Overall, visitors are very satisfied.



93% ▼

Visitors are willing to recommend.



83% ▲

Visitors are willing to return.

\*N.B. Results for 2022 IVS are unweighted

# SUMMARY OF KEY FINDINGS 2019 vs. 2022

## Jul-Sep 2019

 **PREPAID EXPENDITURE**

**\$1,230**

Prepaid per trip

**62.5%**

Flowing into local economy rate

**\$769**

Prepaid per trip

 **ECONOMIC IMPACT**

**\$1,458** per trip

**\$178** per day

 **IN-COUNTRY SPEND**

**\$84**

In-country spend per day



x **8.2** nights  
Average length of stay

**\$689**

In-country spend per trip

## Jul-Sep 2022

 **PREPAID EXPENDITURE**

**\$1,486**

Prepaid per trip

**62.5%**

Flowing into local economy rate

**\$929**

Prepaid per trip

 **ECONOMIC IMPACT**

**\$2,119** per trip ▲

**\$224** per day ▲

 **IN-COUNTRY SPEND**

**\$98**

In-country spend per day



x **9.4** nights  
Average length of stay

**\$1,190**

In-country spend per trip

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

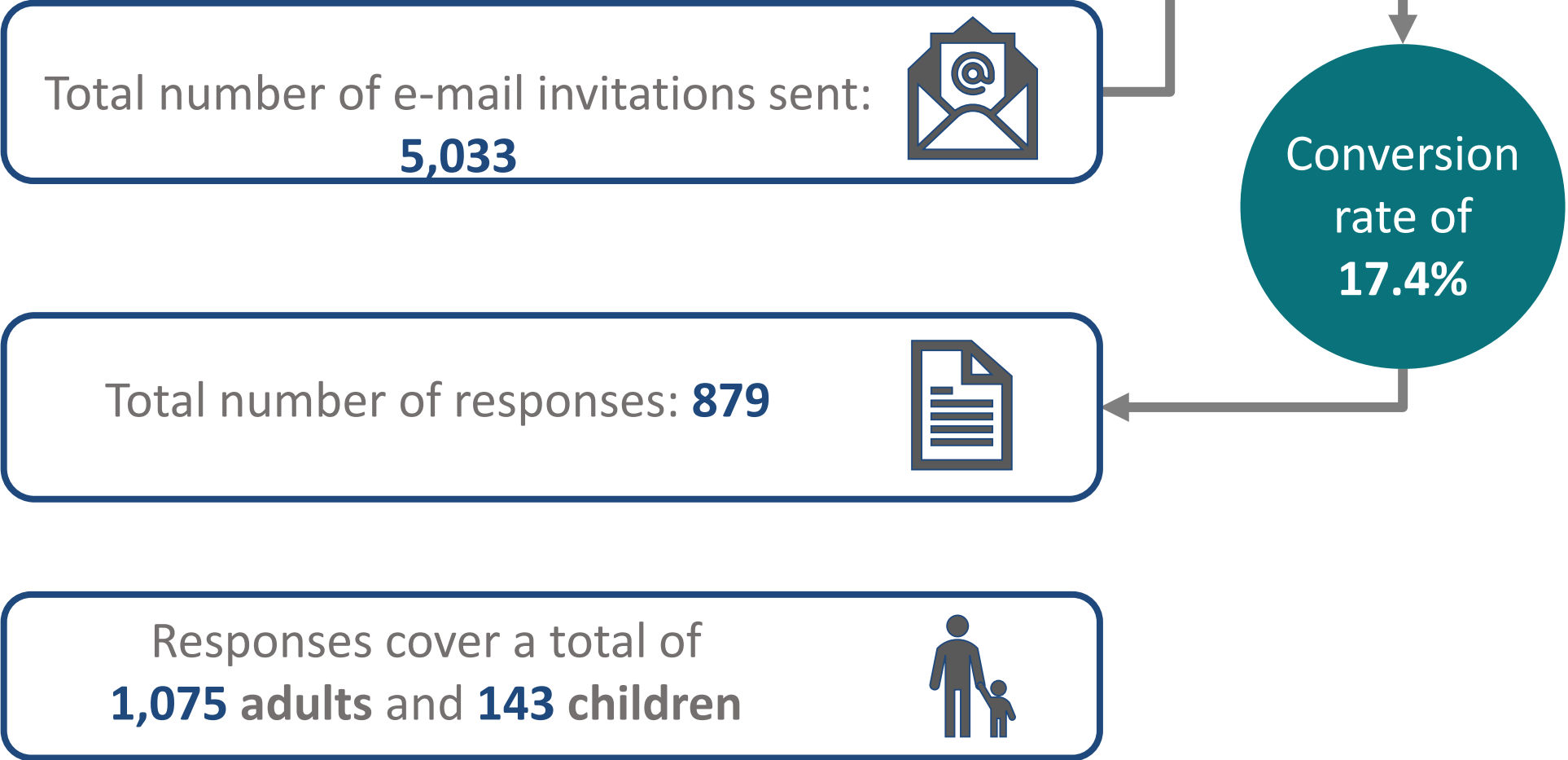


Visitor Spending  
& Impact



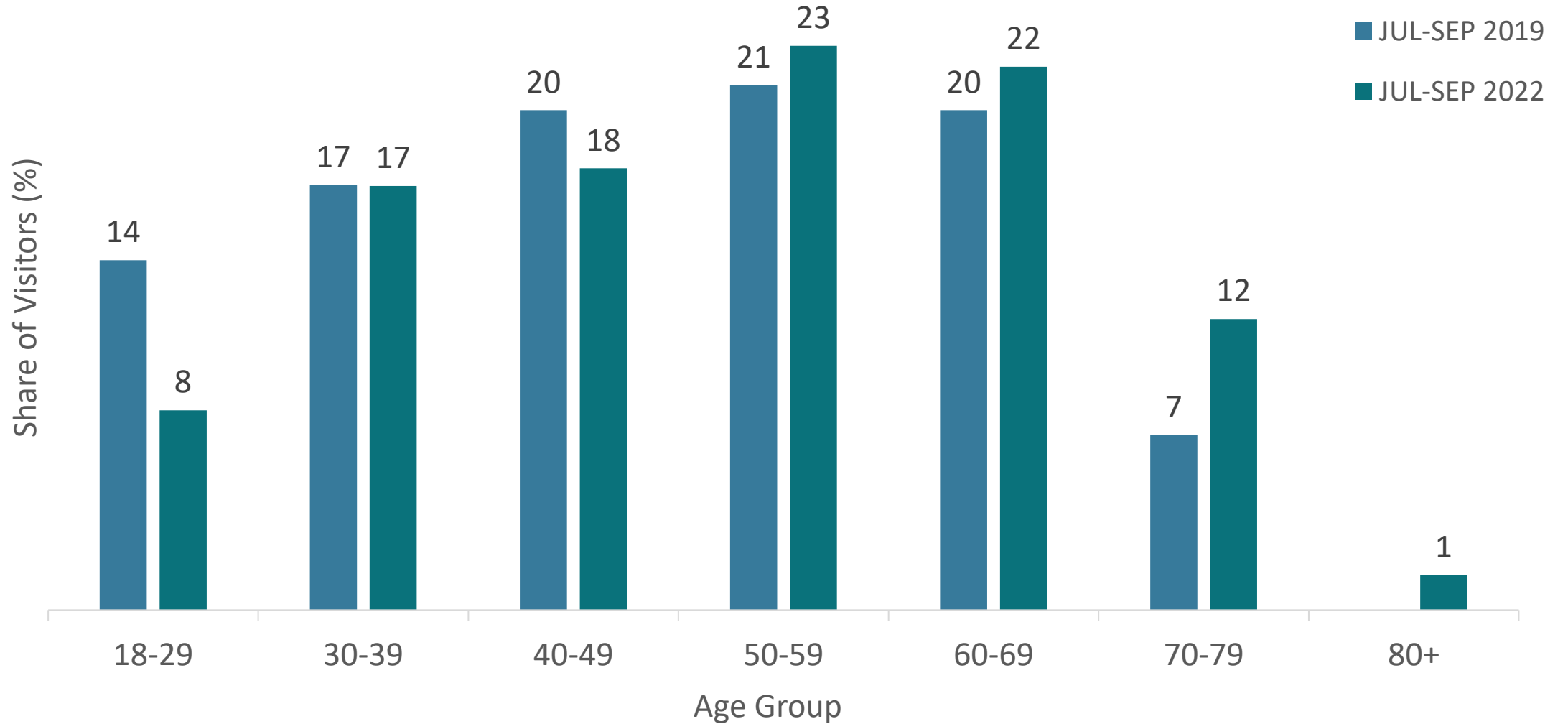
Visitor  
Satisfaction

# Respondents (Jul-Sep 2022)



*Note: The Response Covering Rate (responses/visitors during the period) is not calculated due to missing September arrival data.*

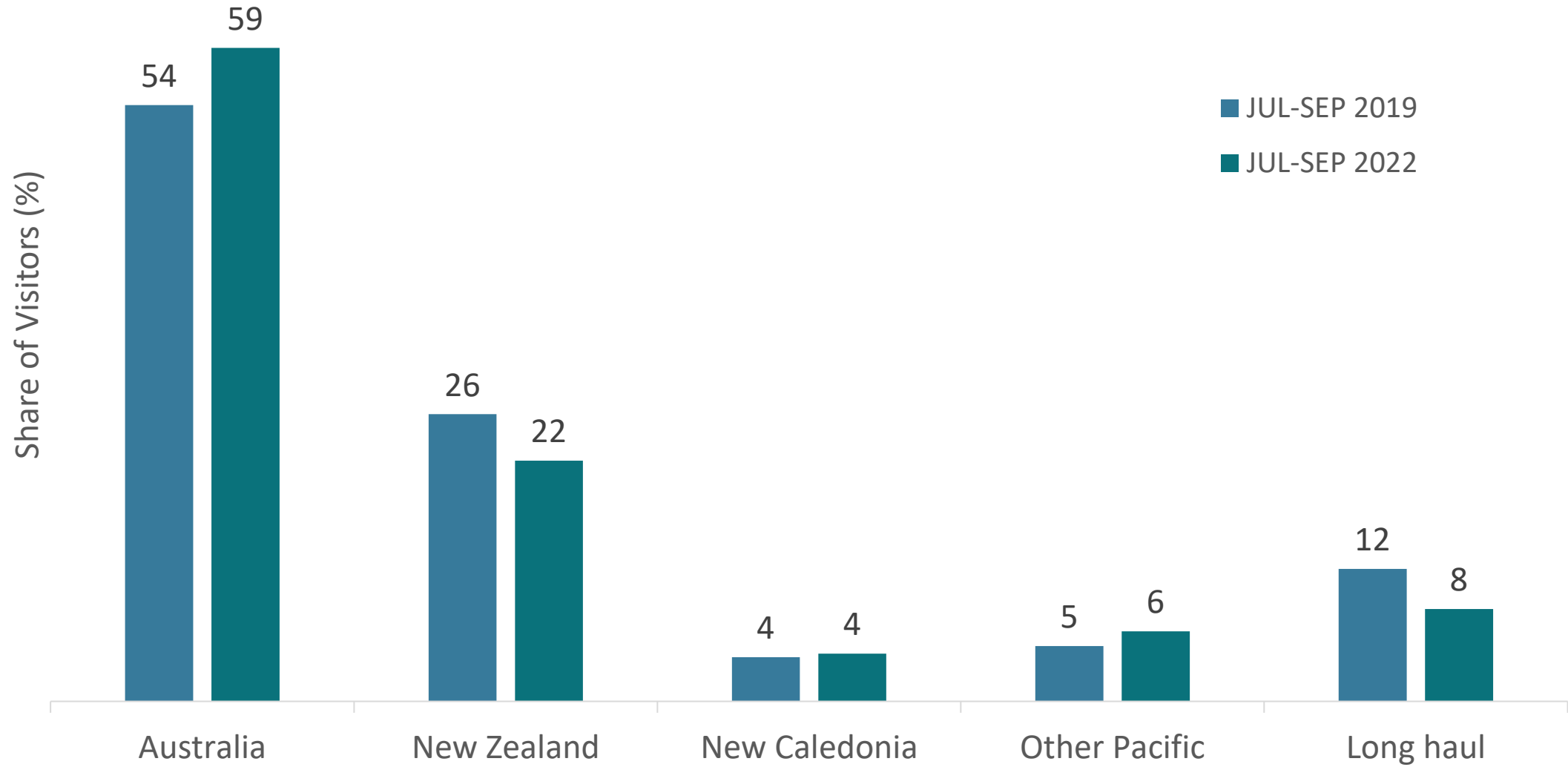
# Age



Note: Due to rounding, total does not sum to 100%

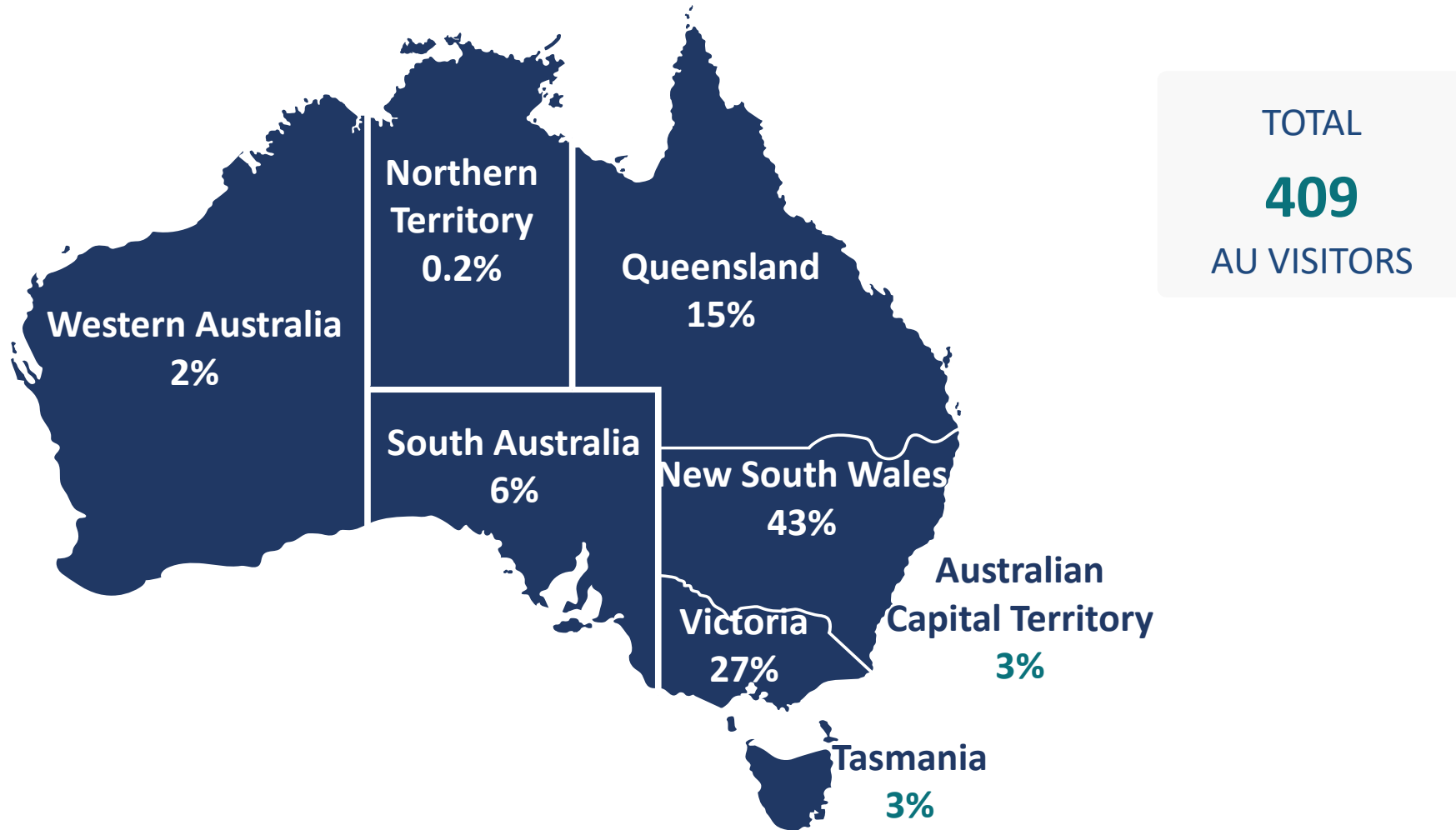


# Country of Origin



*Note: Due to rounding, some totals do not sum to 100%*

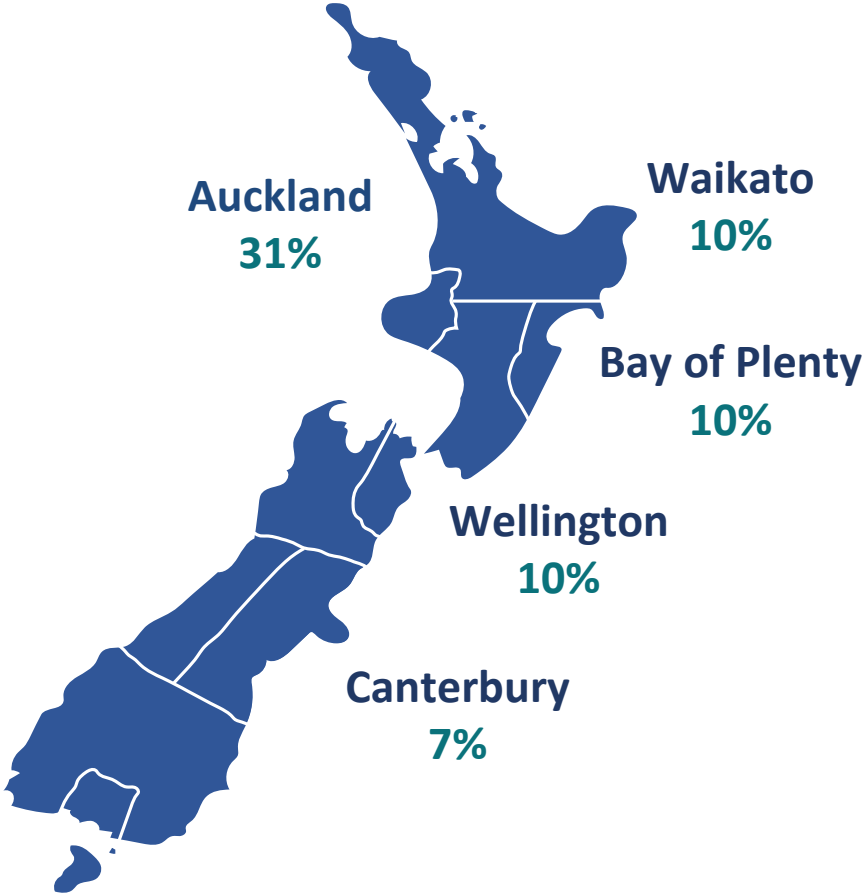
# Australian Respondents - IVS Respondent Data



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

*Note: Due to rounding, total does not sum to 100%*

# New Zealand Respondents - IVS Respondent Data



TOTAL  
**147**  
NZ VISITORS

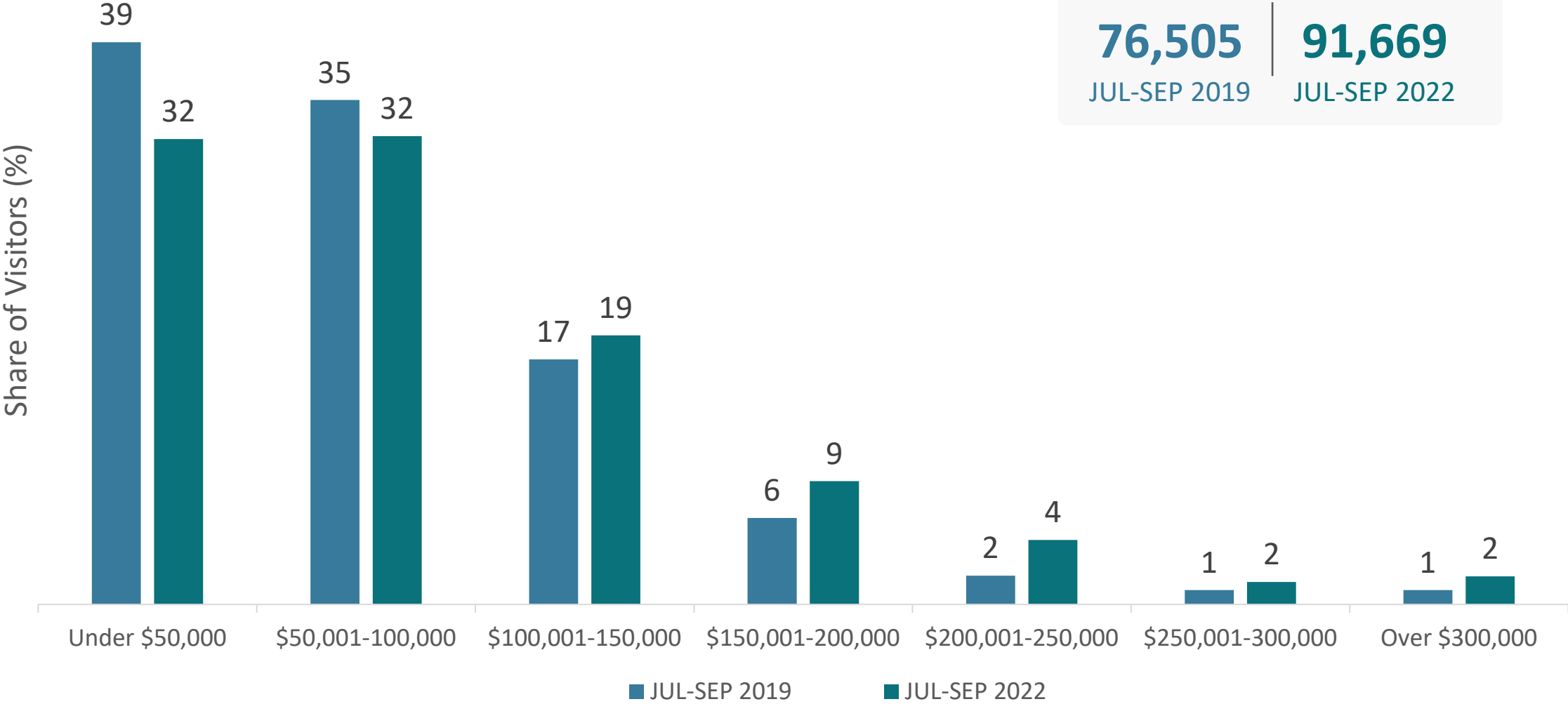
Auckland, Waikato, Wellington, Canterbury, and Bay of Plenty make up **69%** of all New Zealand visitor arrivals

*Note: Due to rounding, total does not sum to 100%*

# Annual Household Income

Avg. Household Income

<b>76,505</b>	<b>91,669</b>
JUL-SEP 2019	JUL-SEP 2022



Note: Due to rounding, total does not sum to 100%

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

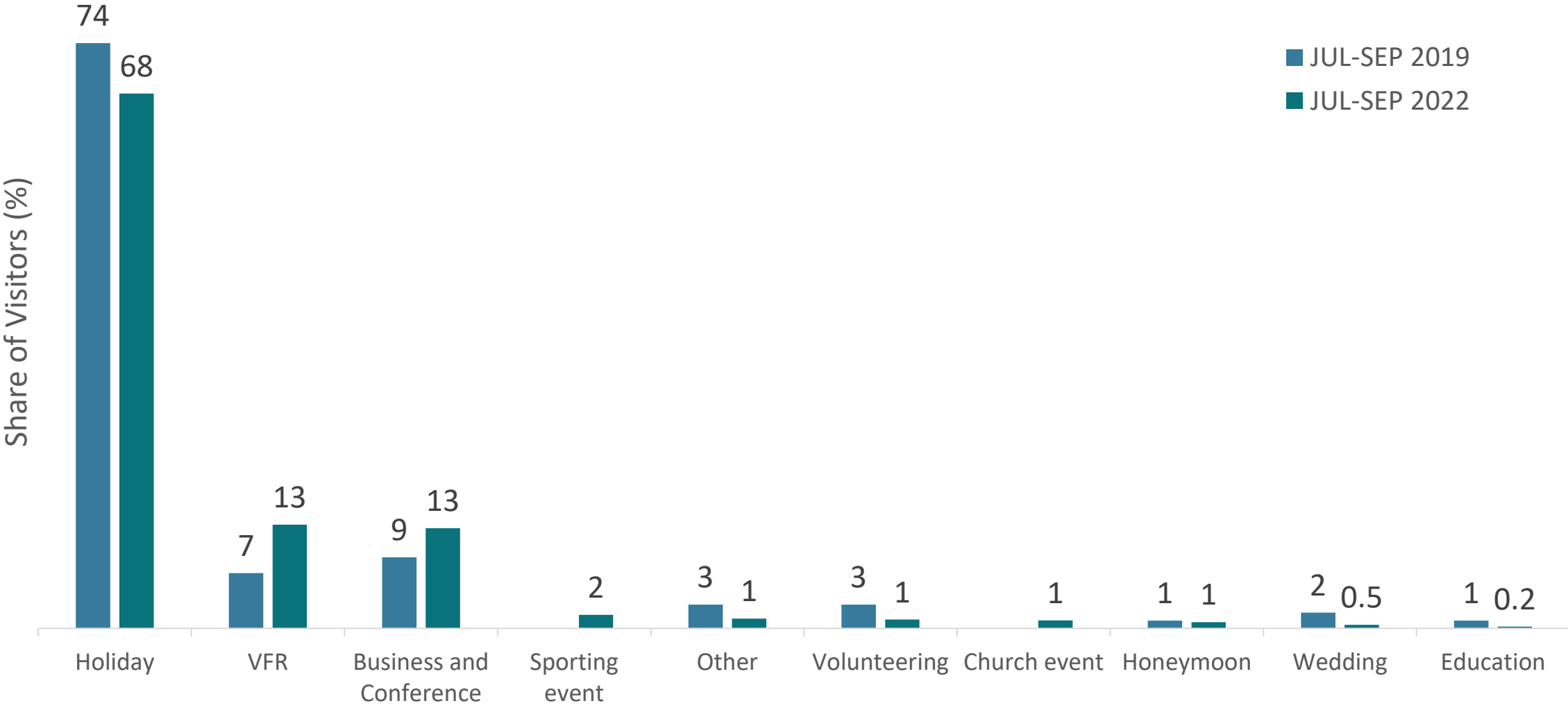


Visitor Spending  
& Impact



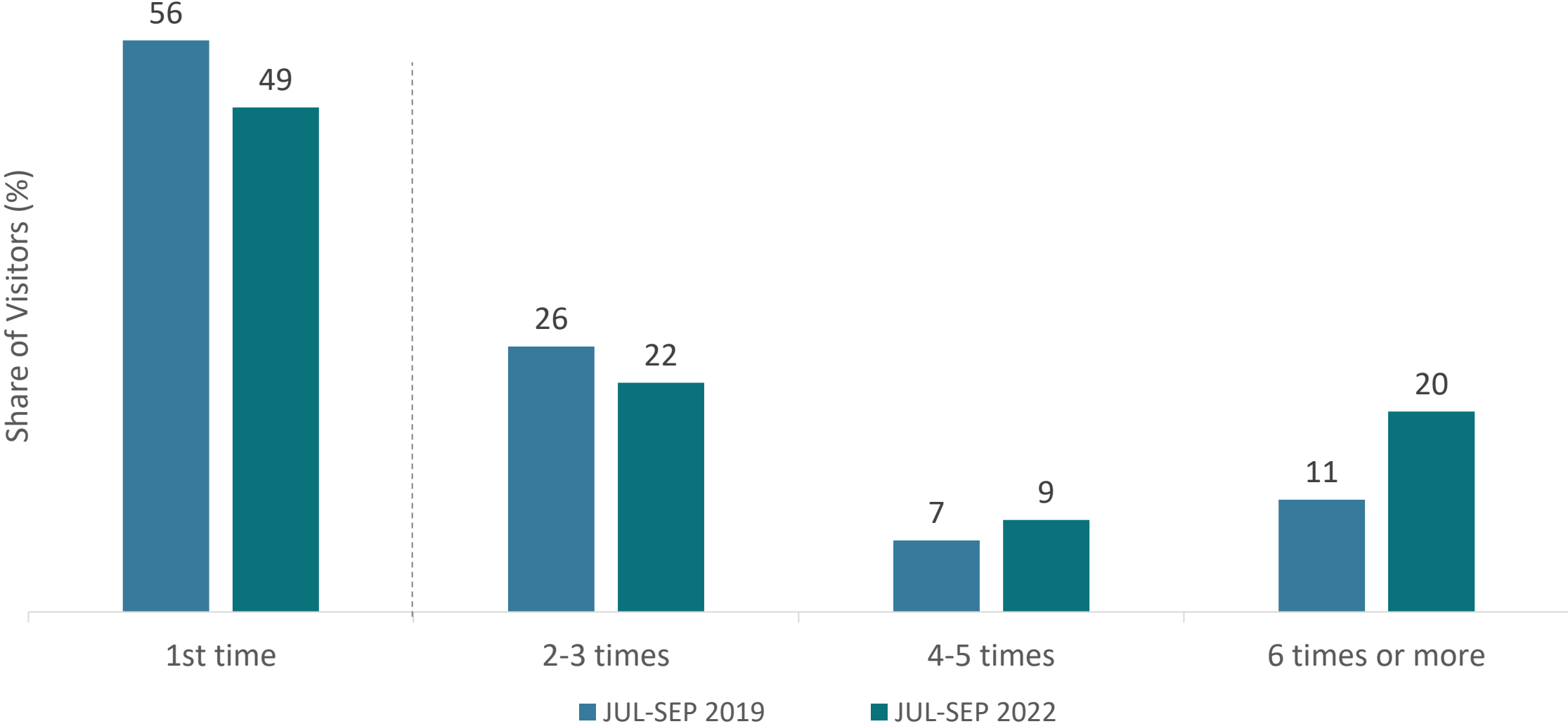
Visitor  
Satisfaction

# Purpose of Visit



Note: Due to rounding, total does not sum to 100%

# Previous Visits



# Length of Stay (nights)

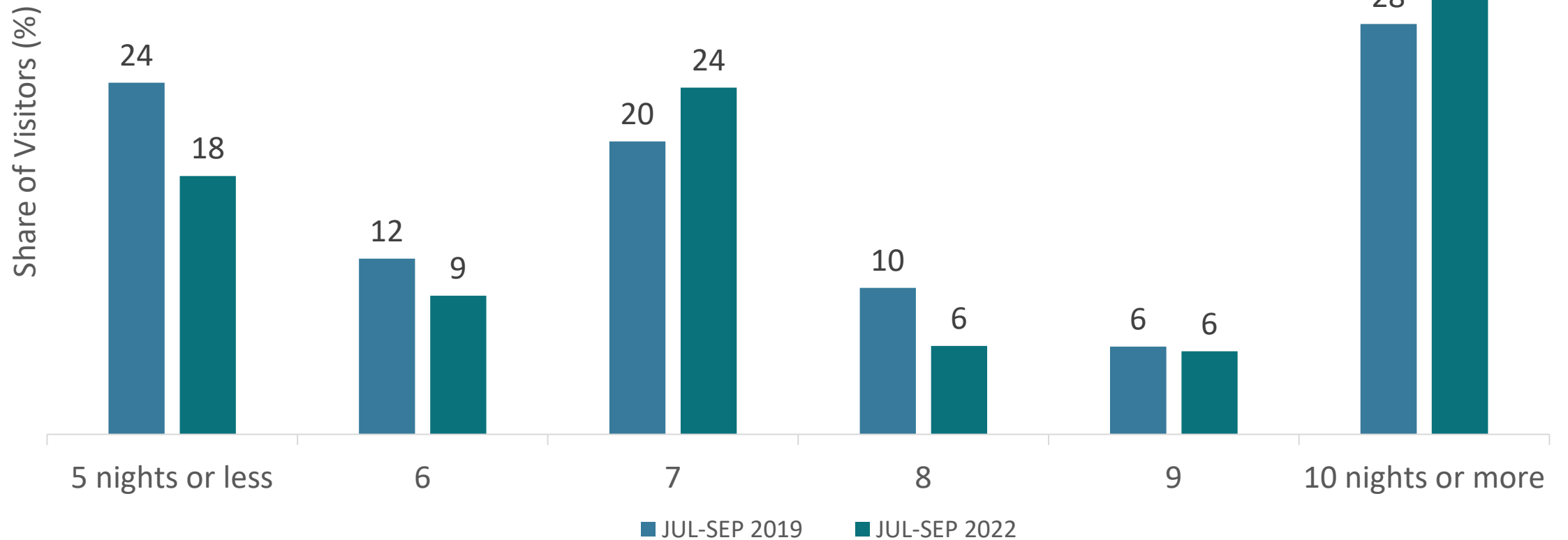
Avg. Length of Stay (nights)

**8.2**

JUL-SEP 2019

**9.4**

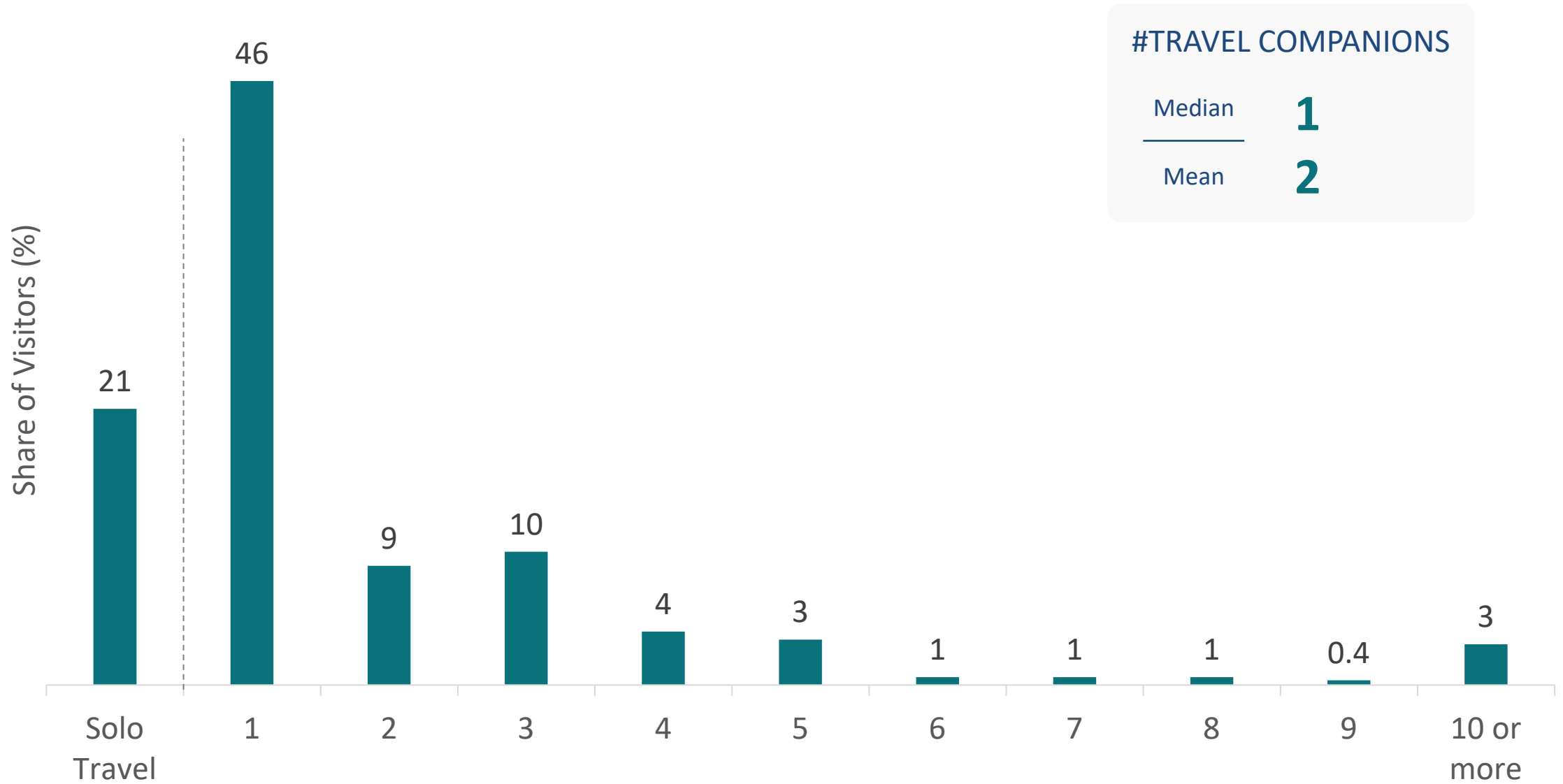
JUL-SEP 2022



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



# Travel Group



Note: Due to rounding, total does not sum to 100%

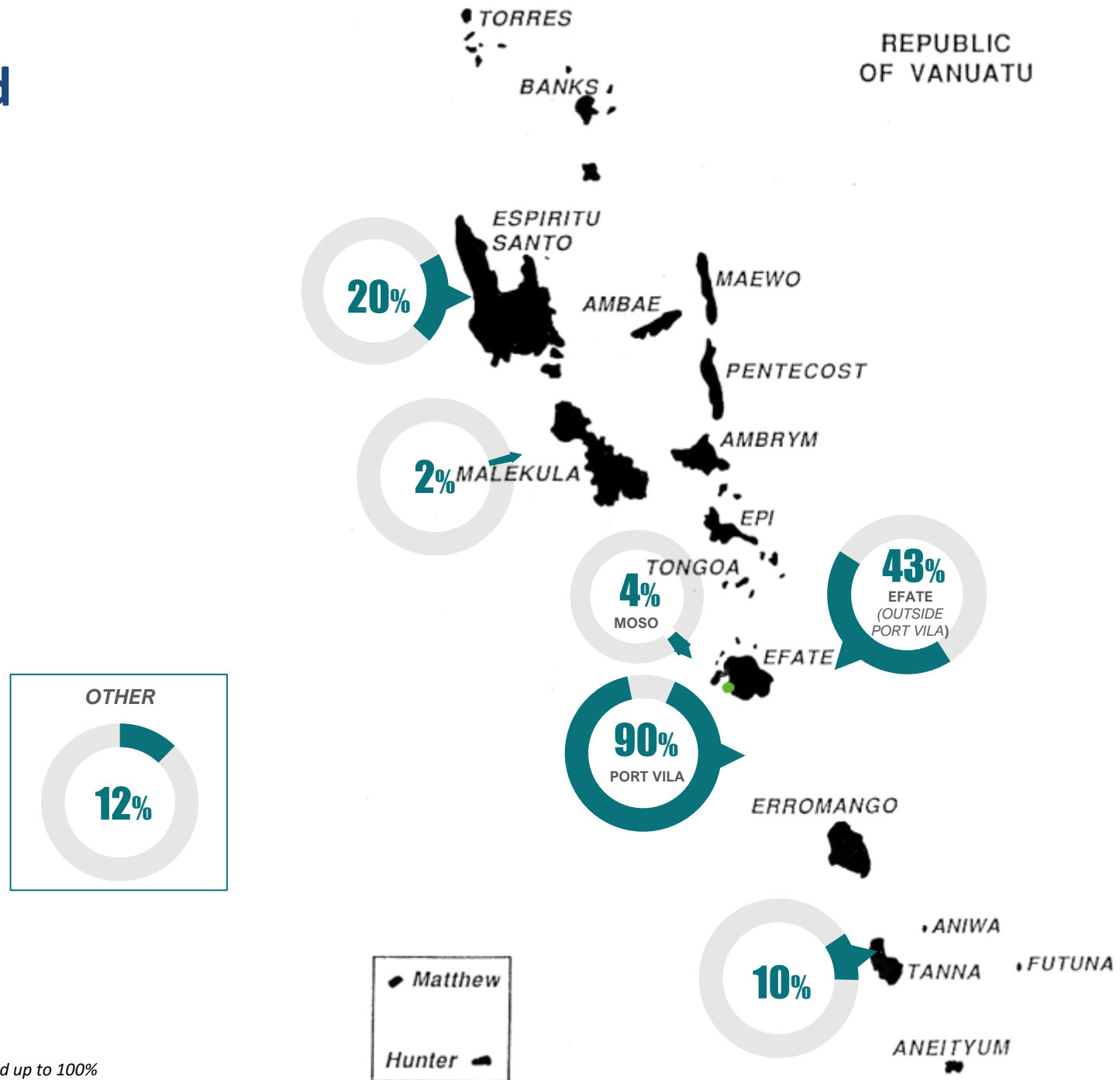
# Airlines Used for Travel



Share of Visitors (%)

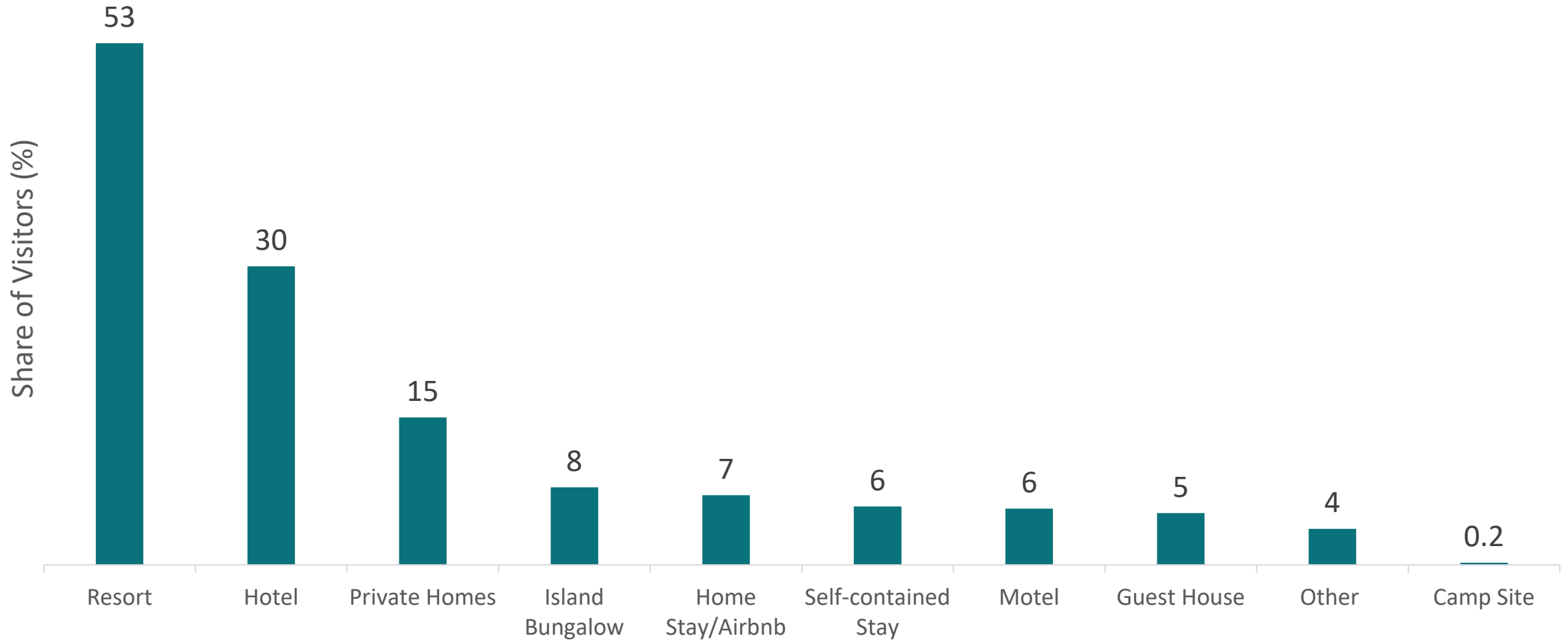
Note: Multiple responses, therefore total does not add up to 100%

# Islands Visited



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

# Accommodations

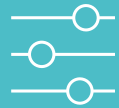


*Note: Multiple responses, therefore total does not add up to 100%*

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

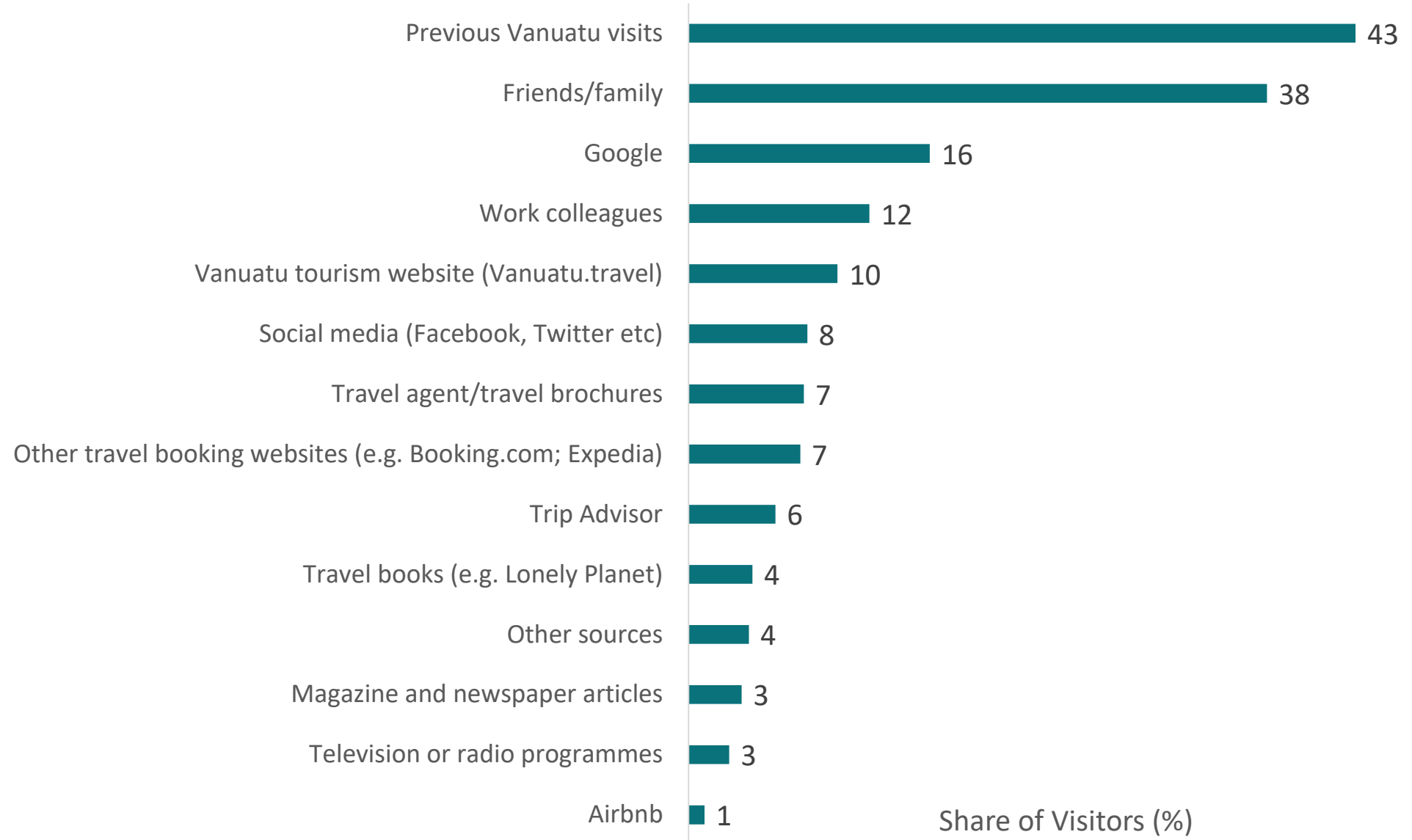


Visitor Spending  
& Impact

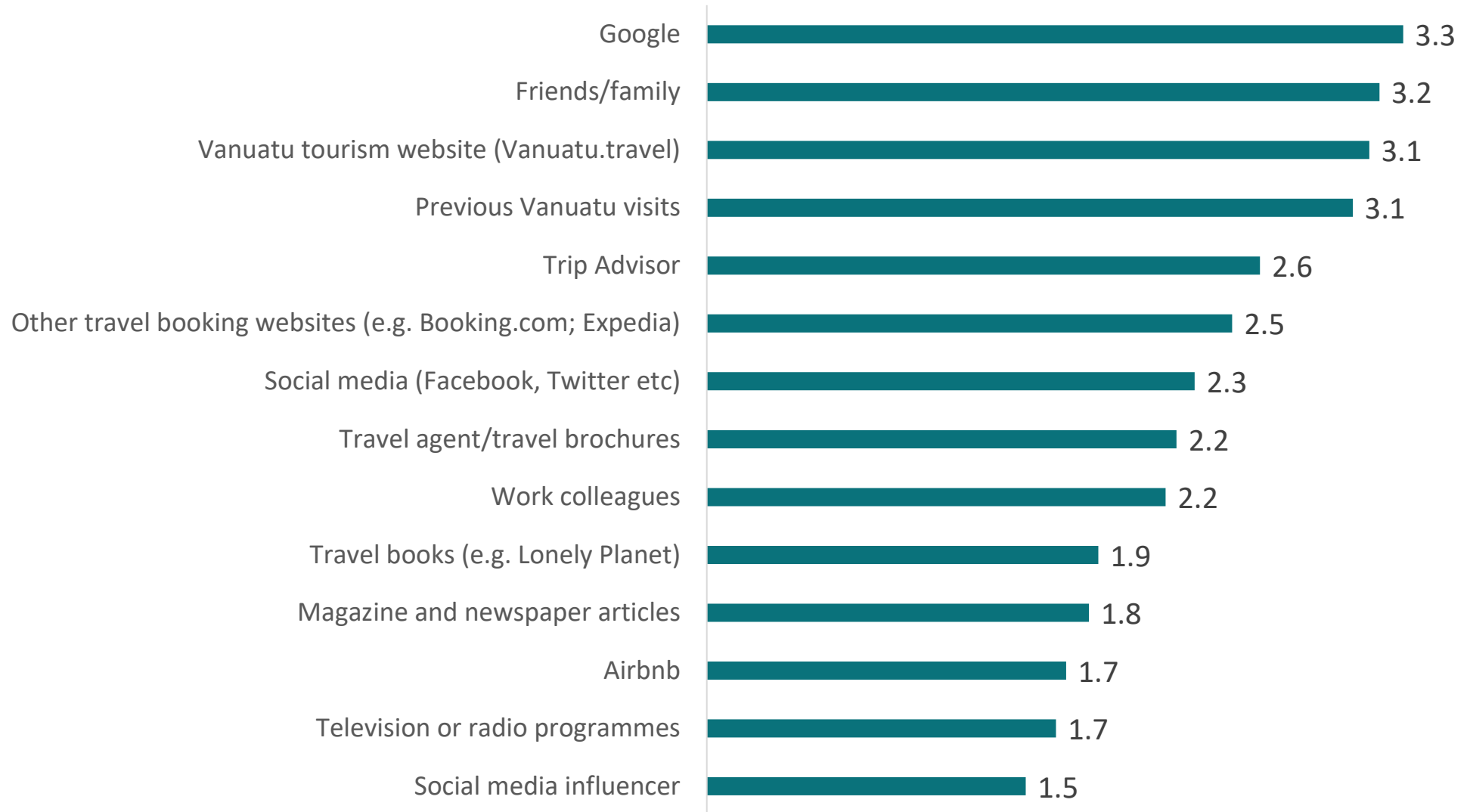


Visitor  
Satisfaction

# Information Source: How did you find out about Vanuatu as a destination?

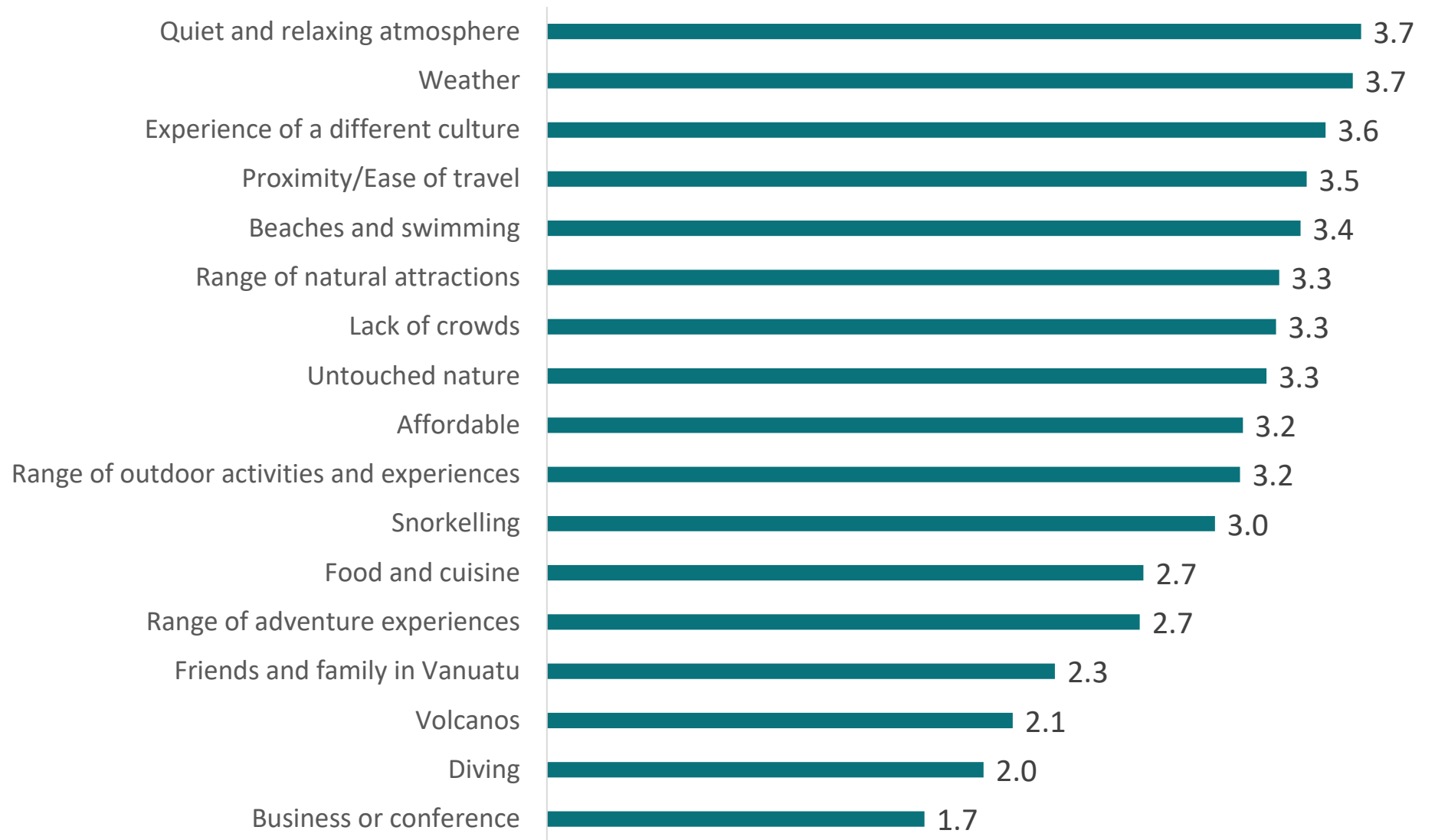


# Information Source: How important was the information source when planning your trip?



Scale: 1=Not at all important to 5=Extremely important

# Influential Factors to Travel to Vanuatu



Scale: 1=No influence to 5=Primary reason to visit



# Purchasing of Travel

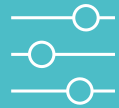


*Note: Multiple responses, therefore total does not add up to 100%*

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

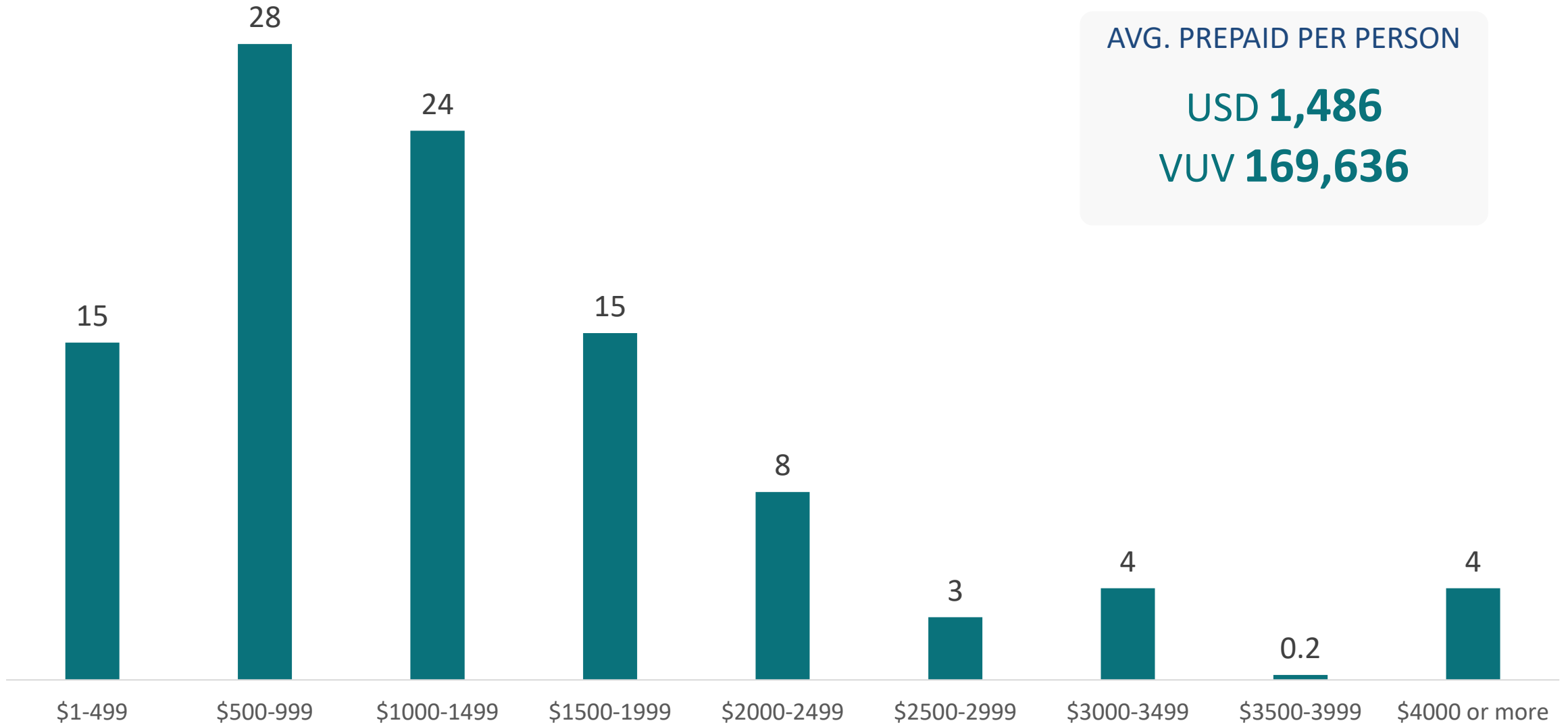


Visitor Spending  
& Impact



Visitor  
Satisfaction

# Prepaid Expenditure



AVG. PREPAID PER PERSON

USD **1,486**

VUV **169,636**

*Note: Average exchange rate VUV-USD from July to September 2022 applied.*

# In-country Spend Per Person Per Day While in Vanuatu

	JUL-SEP 2019		JUL-SEP 2022	
	<u>% of sector</u>	<u>USD</u>	<u>% of sector</u>	<u>USD</u>
Accommodation	26	21	39	49
Food & Beverage	30	25	30	38
Retail	9	8	9	11
Domestic Travel	8	7	6	8
Entertainment & Internet & Service	5	5	4	6
Local Transport	7	6	4	5
Tour	8	7	4	5
Duty Free	3	2	2	3
Souvenir	4	3	2	2
<b>TOTAL</b>	<b>100</b>	<b>84</b>	<b>100</b>	<b>126</b>

*Note: Average exchange rate VUV-USD from July to September 2019 and 2022 are applied respectively.*

# Economic Impact – Per Person and Total

	JUL-SEP 2019		JUL-SEP 2022	
	USD	VUV	USD	VUV
<b>Average Spend Prior to Arrival</b>				
Per Person Per Trip	1,230	140,440	1,486	169,636
<i>Flowing into local economy rate – estimated</i>	62.5%		62.5%	
Per Person Per Trip	769	87,775	929	106,038
Per Person per Day	94	10,704	98	11,186
<b>Average Local Spend</b>				
<i>Length of Study (nights) - mean</i>	8.2 nights		9.4 nights	
Per Person Per Trip	689	78,644	1,190	135,829
Per Person per Day	84	9,588	126	14,382
<b>Total Economic Impact-Per Trip</b>	<b>1,458</b>	<b>166,419</b>	<b>2,119</b>	<b>241,867</b>
<b>Total Economic Impact-Per Day</b>	<b>178</b>	<b>20,292</b>	<b>224</b>	<b>25,568</b>

Note: Average exchange rate VUV-USD from July to September 2019 and 2022 are applied respectively.

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
& Impact



Visitor  
Satisfaction

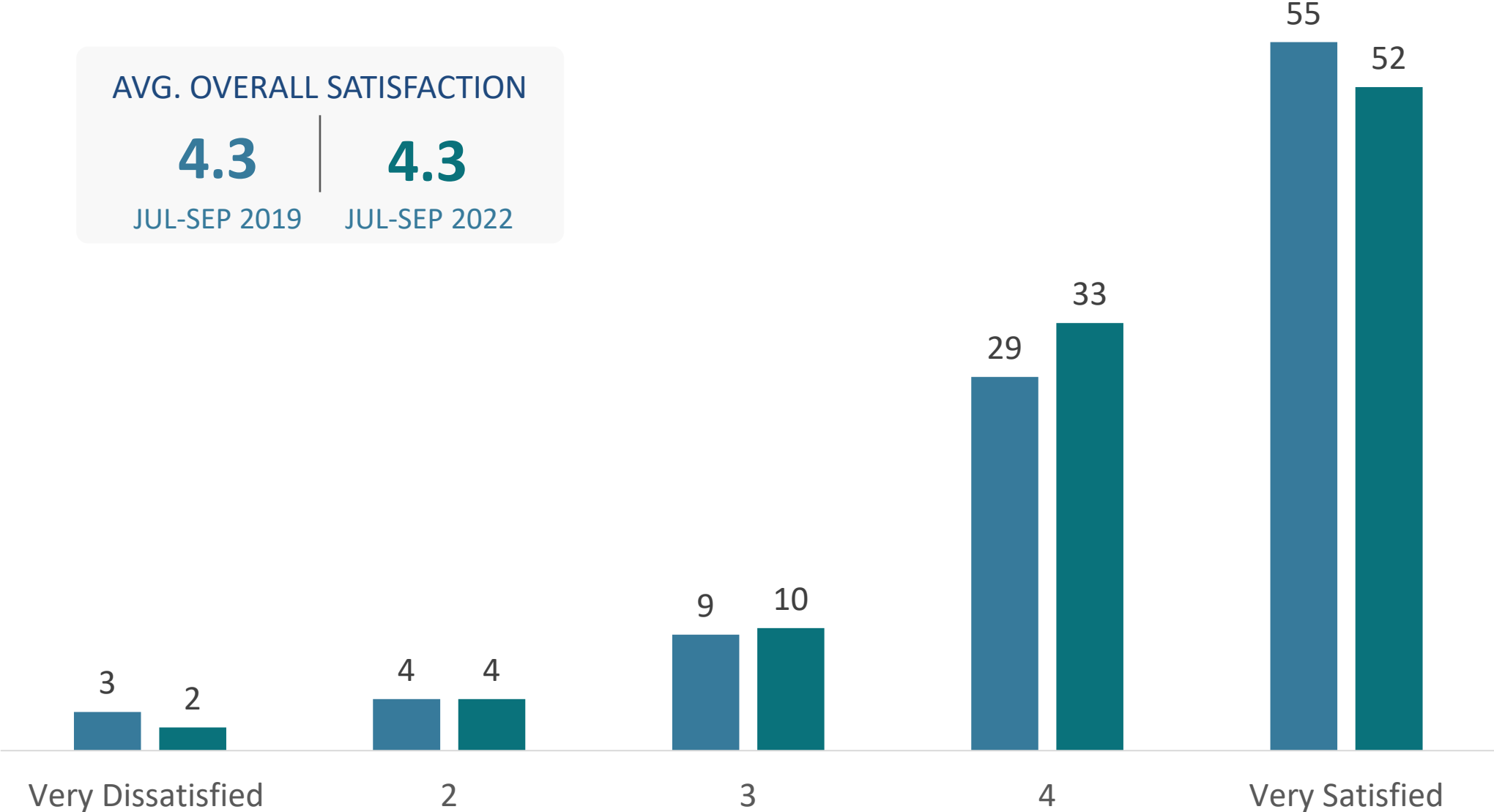
# Visitor Overall Satisfaction

AVG. OVERALL SATISFACTION

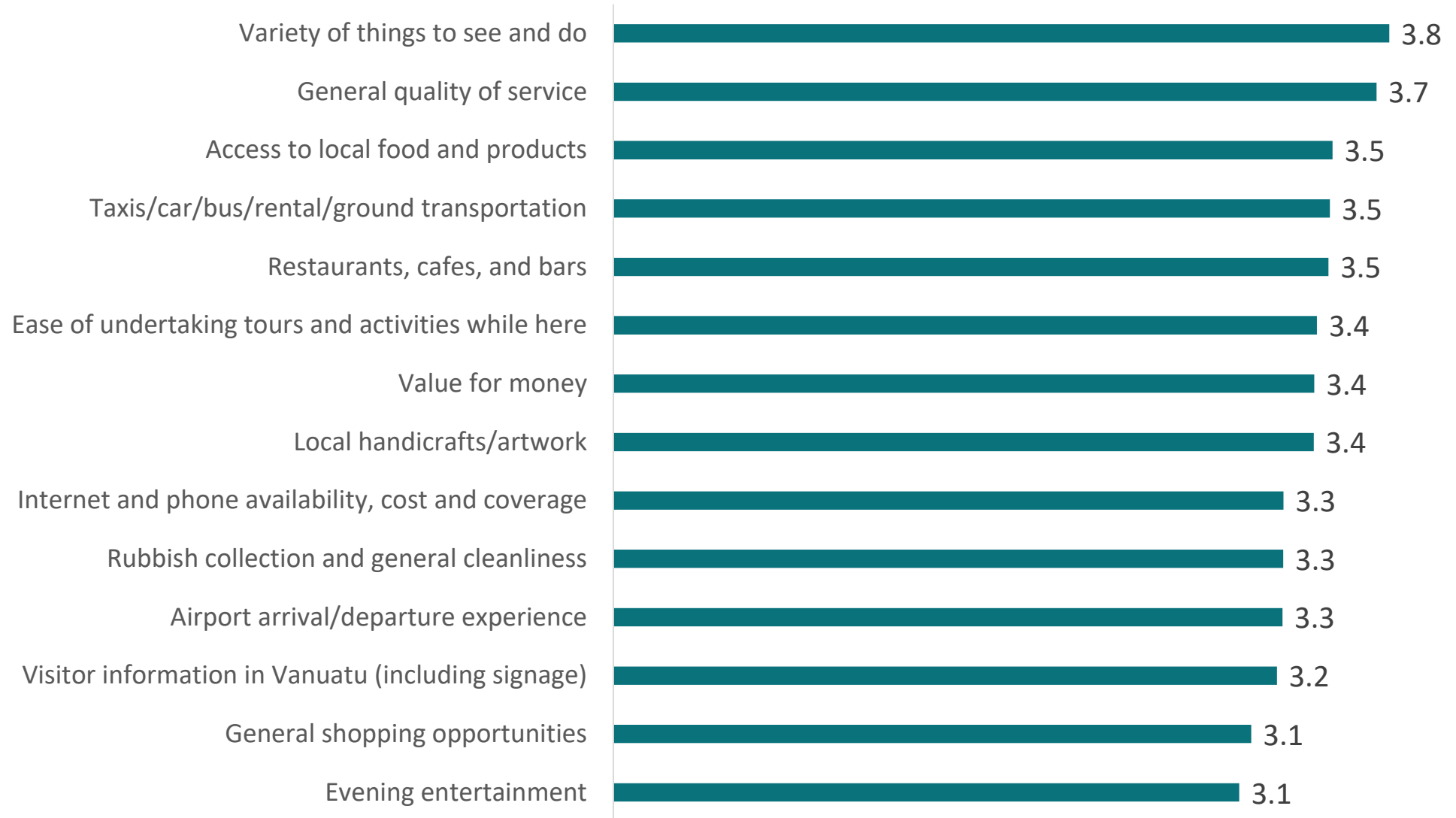
**4.3** | **4.3**

JUL-SEP 2019 | JUL-SEP 2022

Share of Visitors (%)



# Satisfaction with Travel Experience

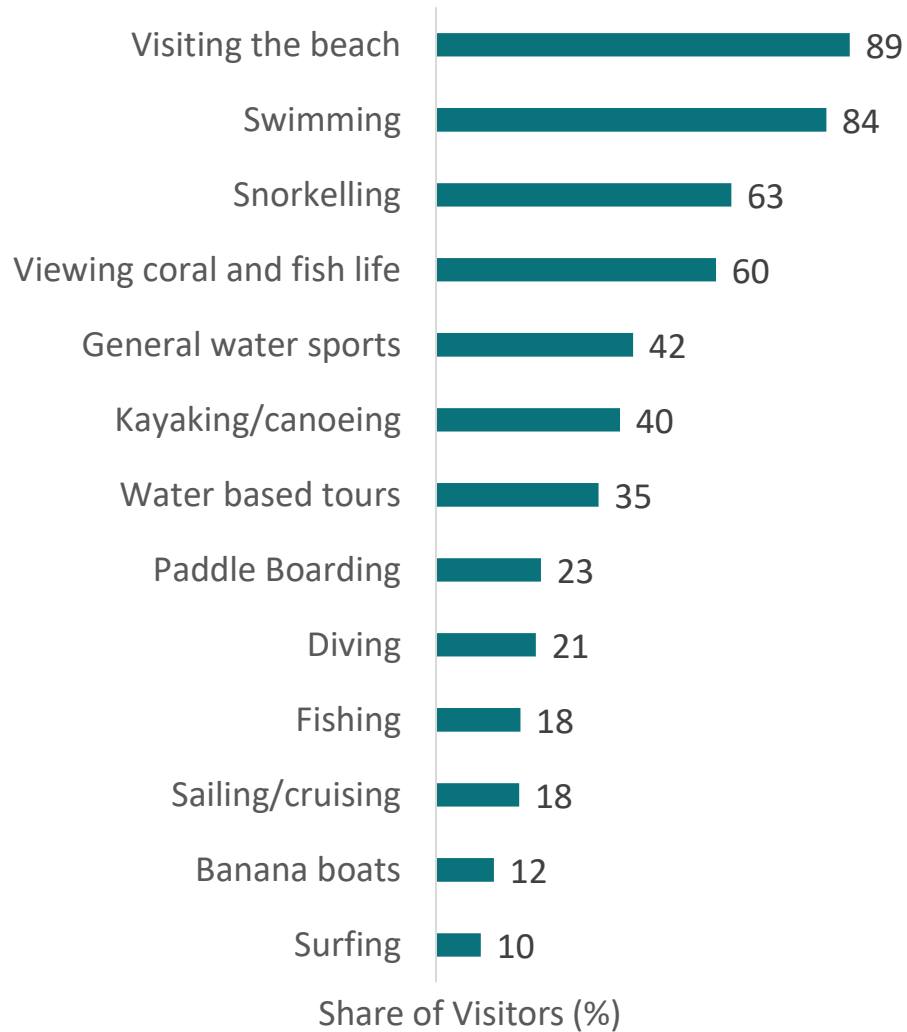


Scale: 1=Very dissatisfied to 5=Very satisfied

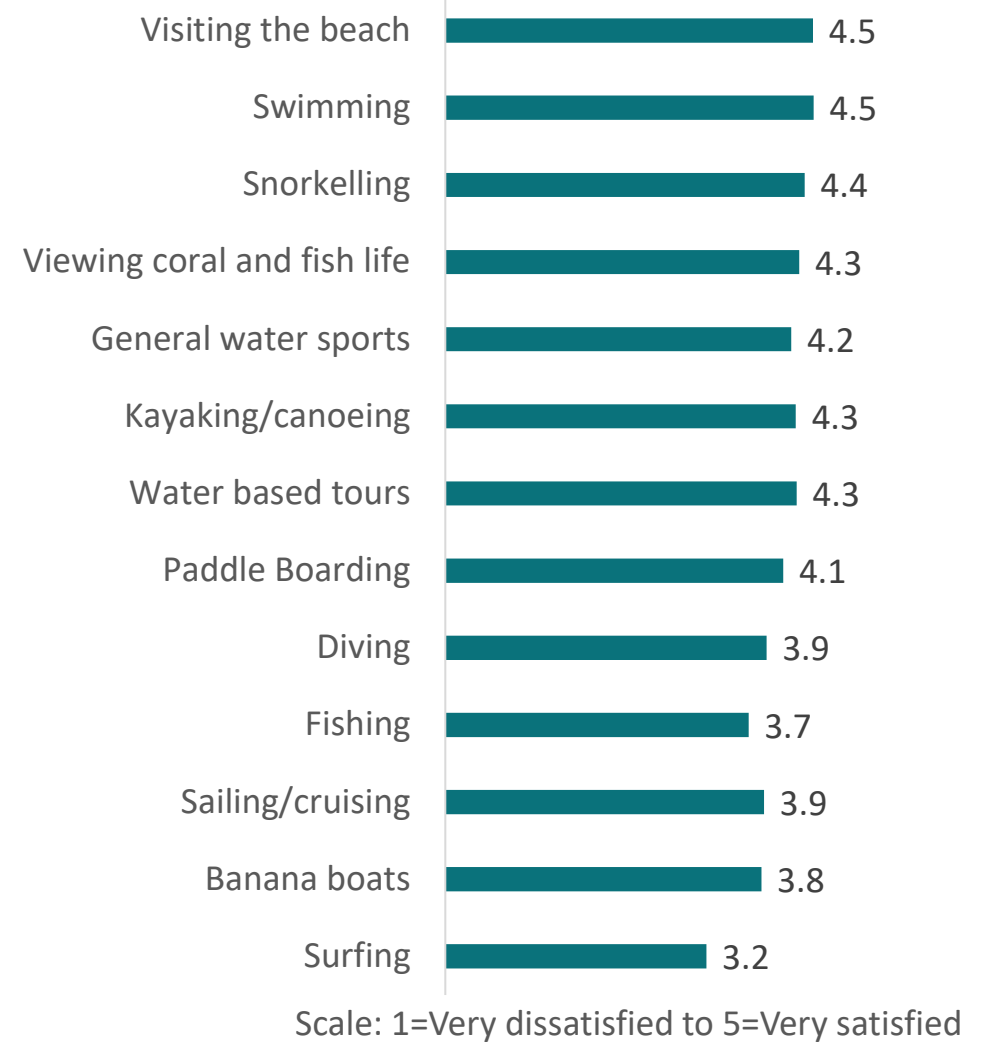


# Water-based Activities

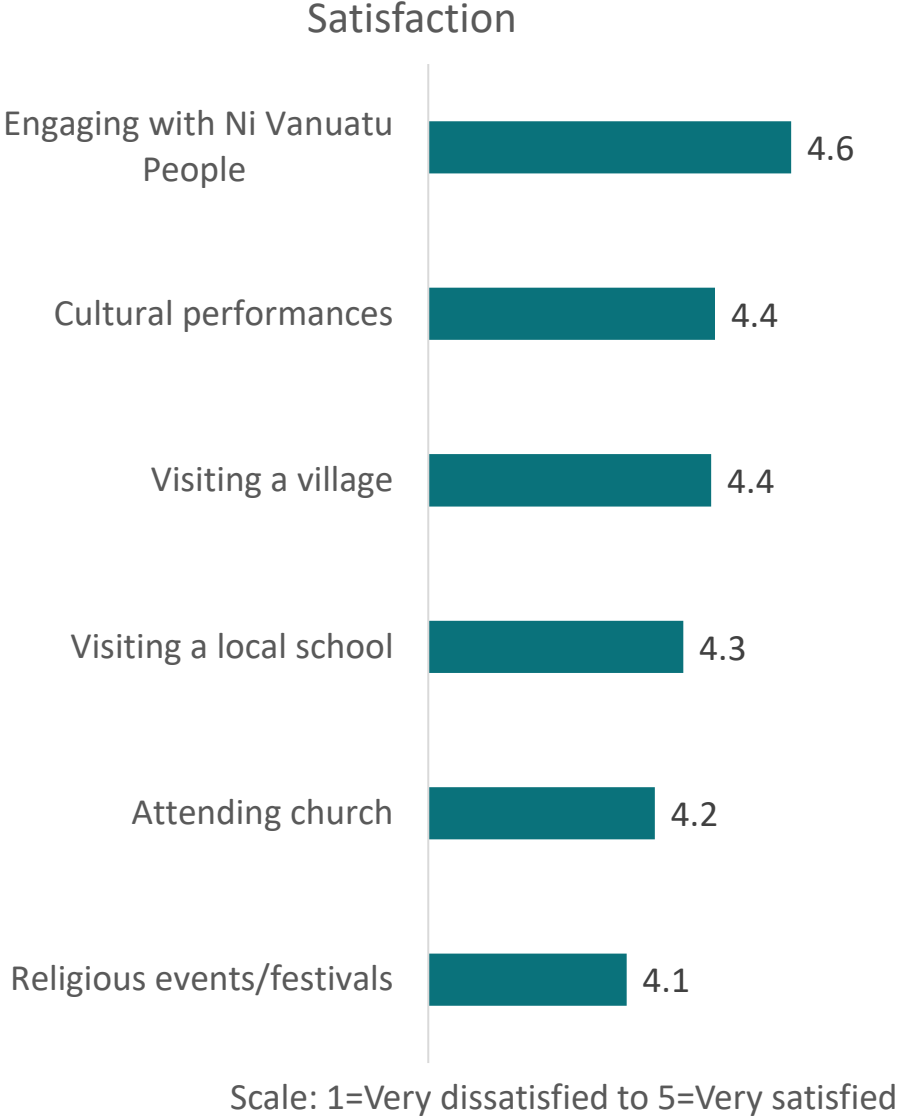
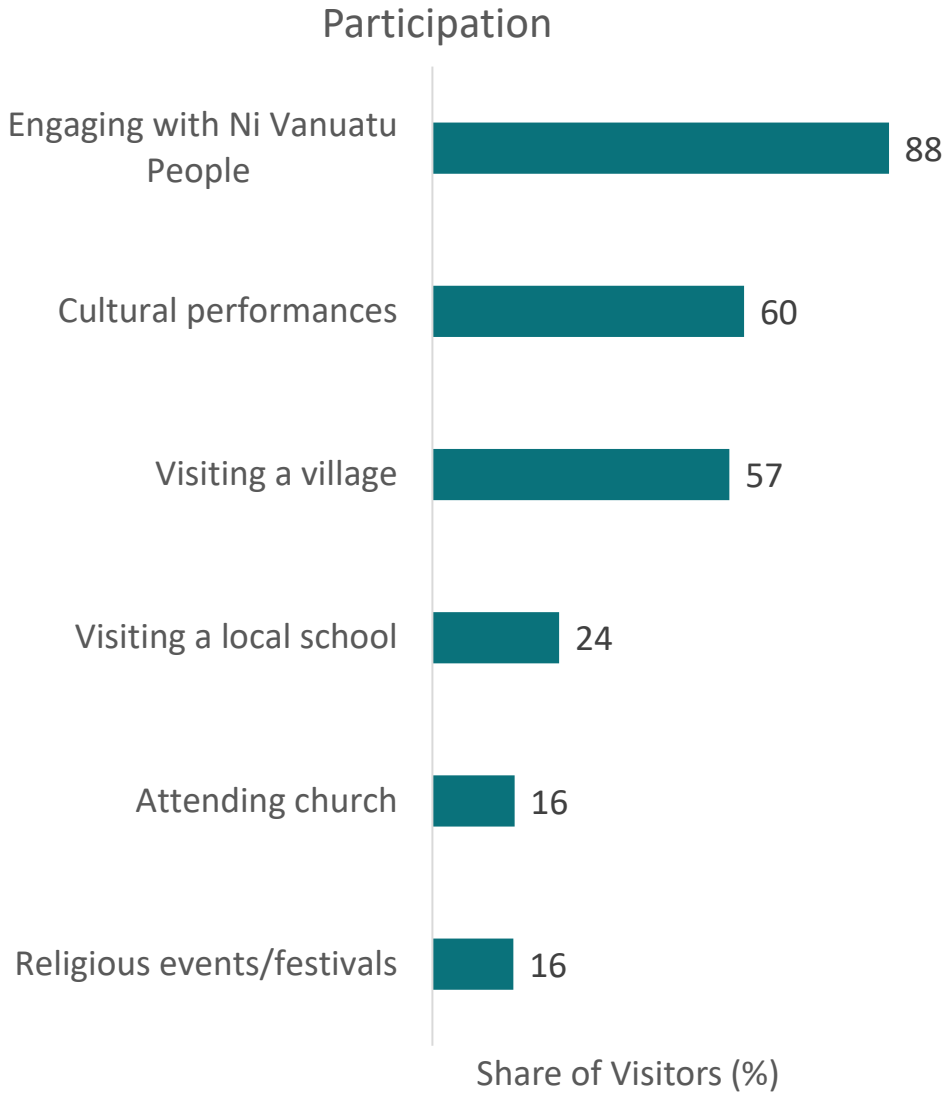
## Participation



## Satisfaction



# Cultural Interaction



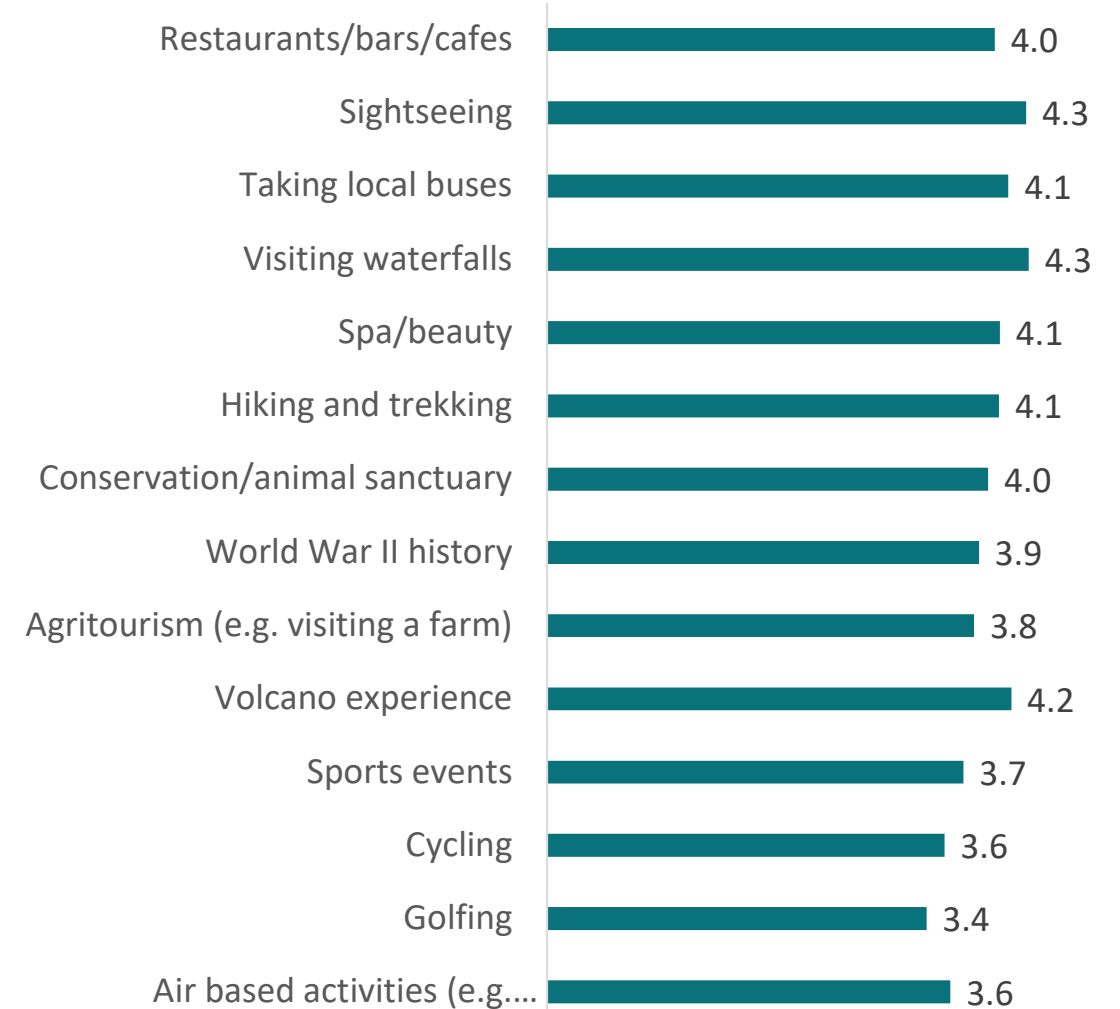
# Land-based Activities

## Participation



Share of Visitors (%)

## Satisfaction



Scale: 1=Very dissatisfied to 5=Very satisfied

# Shopping Activities

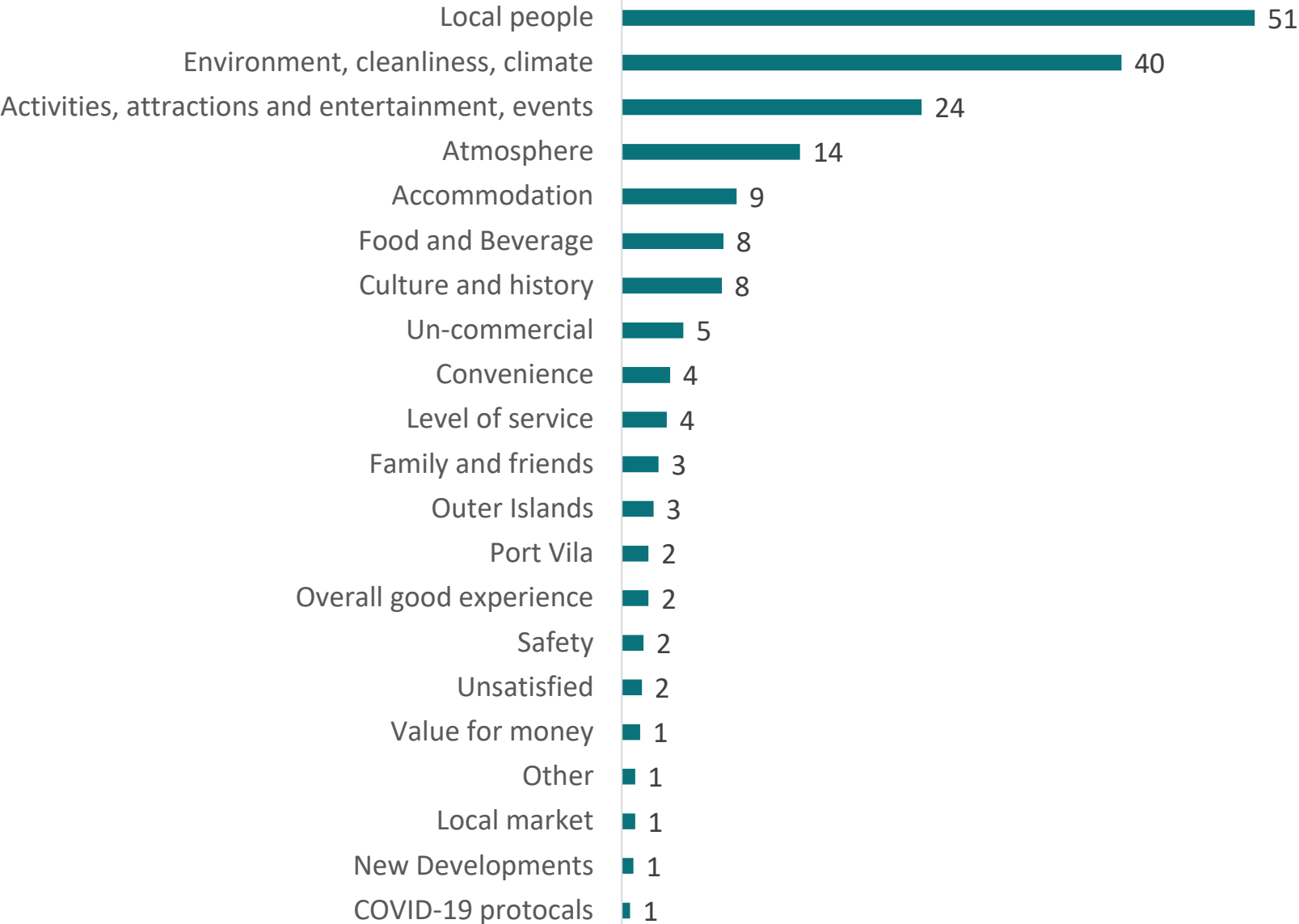
## Participation



## Satisfaction



# Most Appealing Aspects



Share of comments (%)

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

## Most Appealing Aspects – Local People



The people of Tanna.

The NiVanuatu people, the friendliness and helpfulness of them.

All of the locals we met were fabulous.

Loved the friendliness and relaxed style of the people.

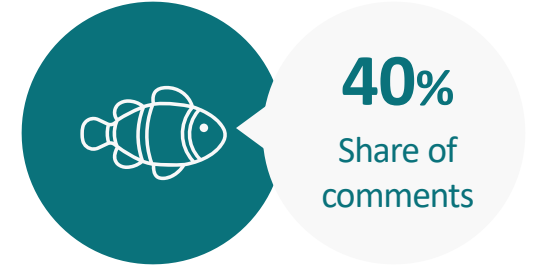
The local people are so friendly and lovely. I thoroughly enjoyed experiencing the culture and talking with Vanuatuan people.

...and how incredibly happy and friendly all of the local Ni-vans are. They are so kind and helpful.

The people. They make the place. Their kindness and warmth. Helps to bring perspective to a crazy busy western schedule.

The friendly people locals from the village and their appreciation of NZ most of them seemed to have family on a work scheme I didn't realise how important those opportunities were for Vanuatu.

## Most Appealing Aspects – Environments, Cleanliness, Climate



The beautiful scenery and greenery.

Untouched landscapes, nice people, snorkeling, animal life.

The natural beautiful of the beaches and reef. The warmth and kindness of its people and the weather.

Vanuatu has the best beaches and a lot of picnic spots.

The snorkeling and coral/sea-life. It was a main focus of our trip before we came.

The pristine nature of the beaches and ocean was such an unbelievable treat after Fiji and Indonesia.

# Most Appealing Aspects – Activities and Attractions



**24%**  
Share of  
comments

To visit the Hot Springs in Tanna

Diving the President Coolidge. Blue holes and beaches in Santo.

...also thoroughly enjoyed visiting the volcano on Tanna although the 8000 vatu entry charge was quite steep.

Snorkelling at million dollar point; lunch on the beach at port Olry and Ratua, swimming in Jackies blue hole, champagne beach.

I found the places we visited the most attractive! I really liked the blue holes and beach views!

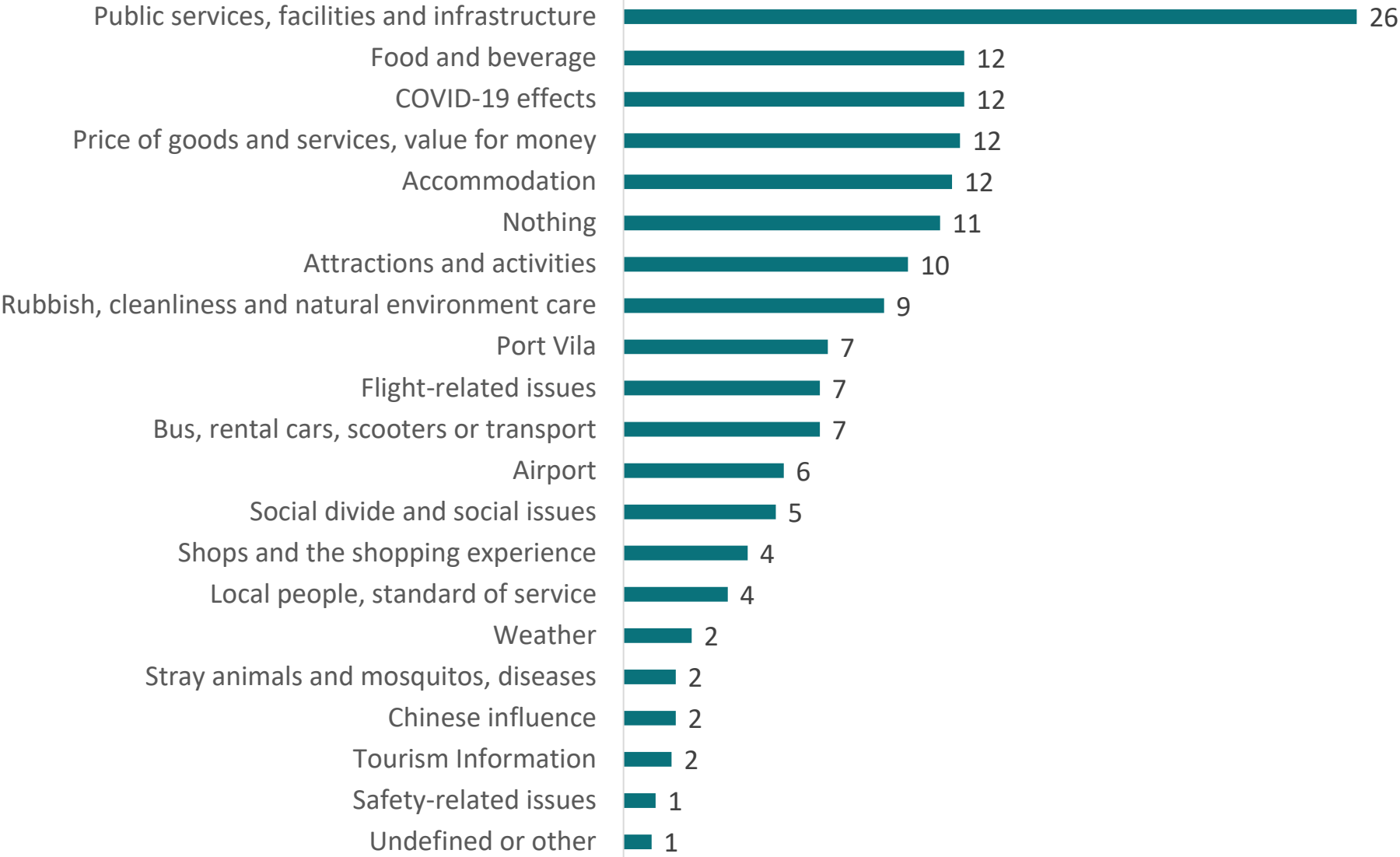
...the beautiful snorkelling, the stunning views, the Blue Lagoon & Eton beach & Rentapau River tour.

We adore snorkeling and it was PERFECT at Turtle Bay Lodge on Santo.

I was there for Independence Day Celebrations and it was very special to be amongst local Ni-Vanuatu and I enjoyed the local kai, the ceremonies and just the general buzz and excitement of this special day for the country.



# Least Appealing Aspects



Share of comments (%)

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

# Least Appealing Aspects-Public Service and Infrastructure



Infrastructure "not open yet".

It took a long time to travel on the rough roads - but was usually worth it when you got there!

Poor state of the roads which made it difficult to get around.

WiFi access is very limited for tourists - could use a government free WiFi system like other countries. .

Signs and pricing for attractions had not been updated so cost were often a lot higher than advertised (blue lagoon for eg)

The lack of adequate or operational fan cooling in public facilities like the airports. Please consider these:  
<https://bigassfans.com/au/powerfoil-x3/>

# Least Appealing Aspects – Food & Beverages



Quality of food.

Lack of milk.

The lack of options for eating out.

The food is pretty substandard at bars, hotels and restaurants.

Food was quite westernised and most restaurants seemed to serve the same type of menus, bistro style.

The food was not as good as other Pacific islands but we are aware that everything had only just opened up so not everything was running.

## Least Appealing Aspects - COVID Impacts



Le lagoon was not fully restored.

The resort was not ready to take visitors.

Lack of people buzz round due to covid.

Some places were still closed after the pandemic (like hideaway island) so we couldn't go there to snorkel.

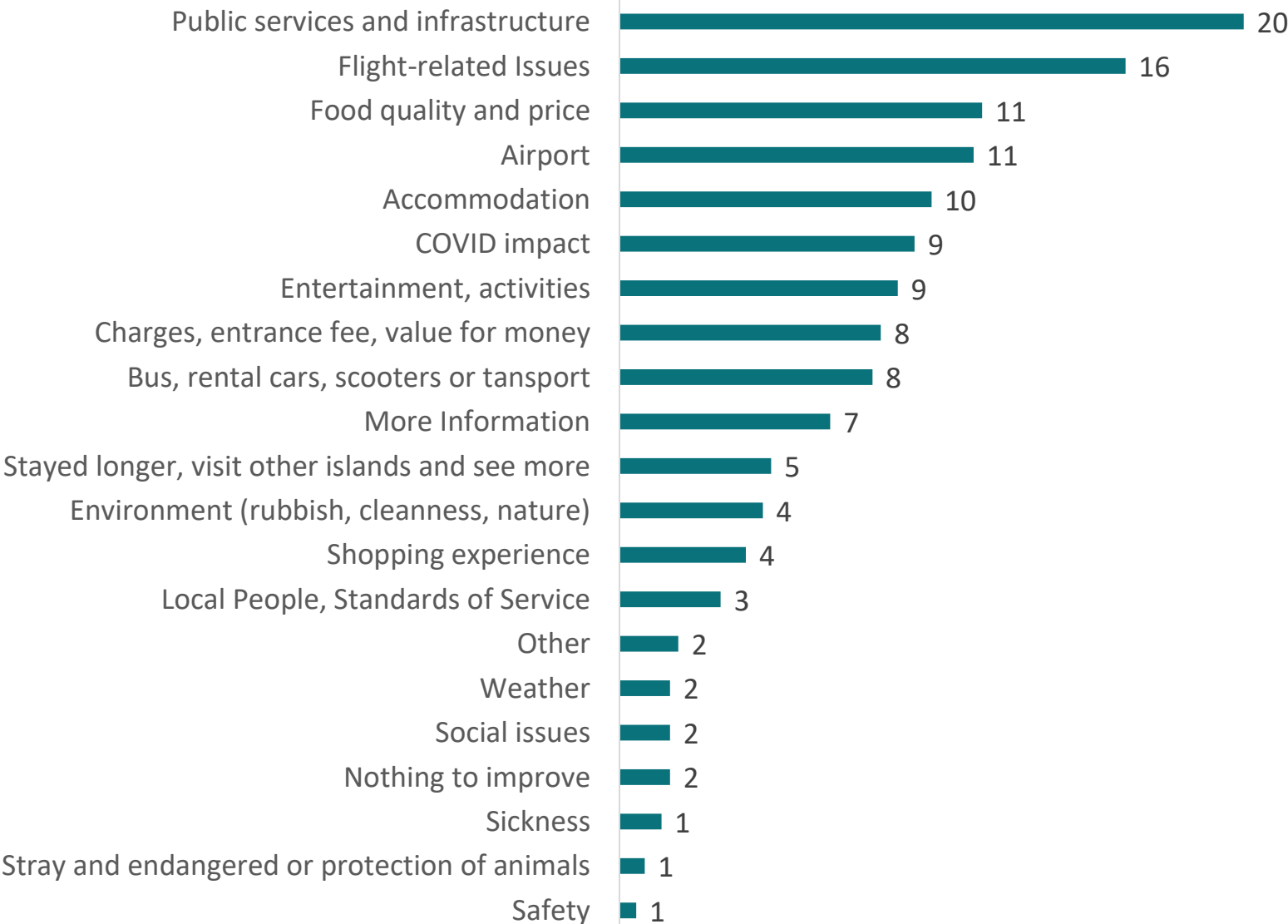
The airport experience was pretty slow, but we understand that they were just restarting post Covid

Unfortunately a lot of places were still closed or getting back up to speed after the lock down so there was a lot of activities not available and the place was quite run down.

The fact that what was advertised had not reopened on Iririki island.

I wouldn't say it was less interesting but I had a lot of sadness as I wasn't prepared for the impact of COVID with the loss of so many businesses - ie local shops as well as some tourist sites that hadn't re-opened. And talked to a variety of local residents and the impact of COVID on their family lives. But also know Ni-Vanuatu are resilient too.

# Suggestions for Improvement



Share of Comments (%)

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

# Suggestions for Improvement-Indicative Quotes

Better roads for easier driving.

Cleaner facilities particularly public toilets.

Direct flights into Santo.

Need to improve air travel scheduling.

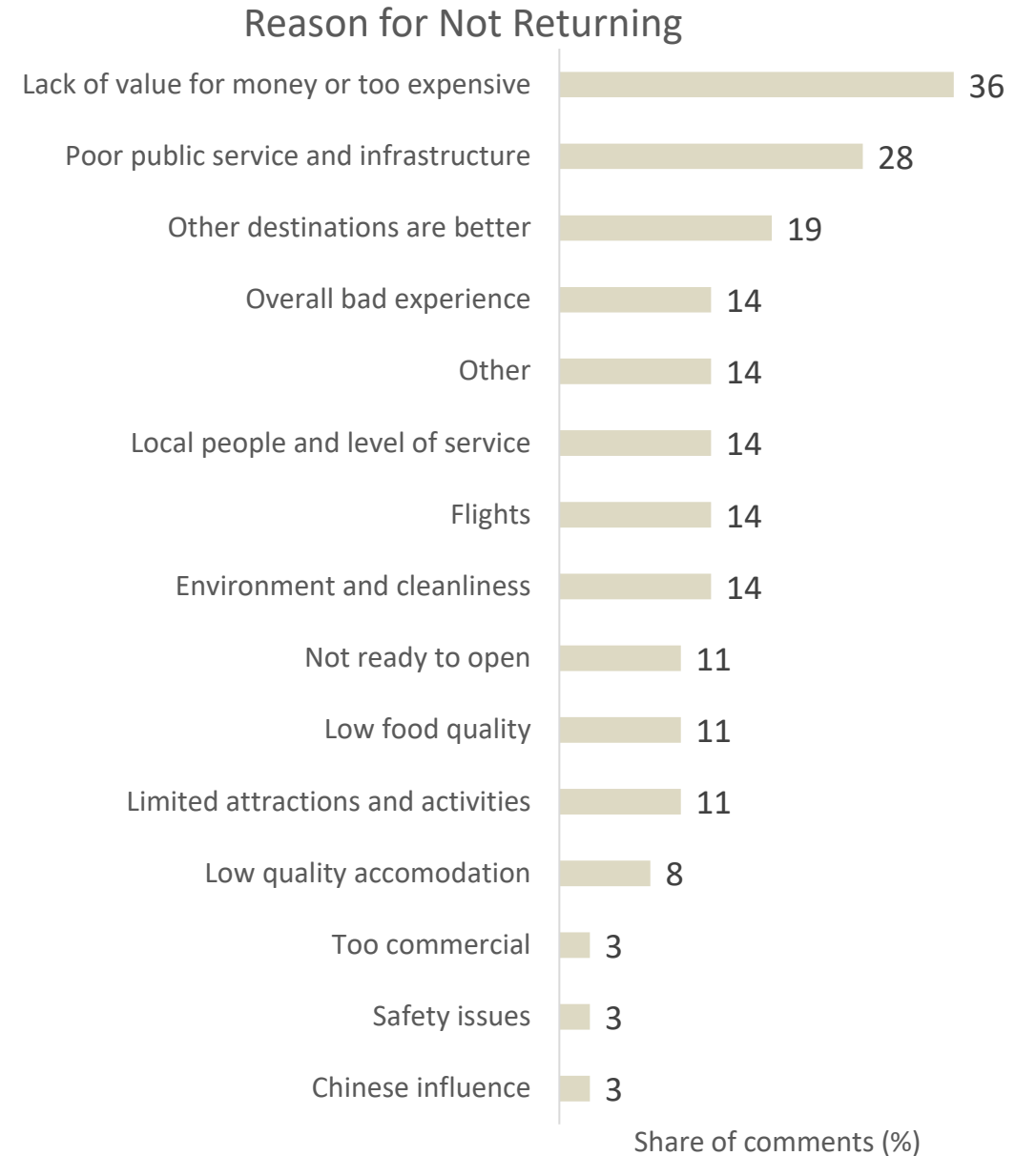
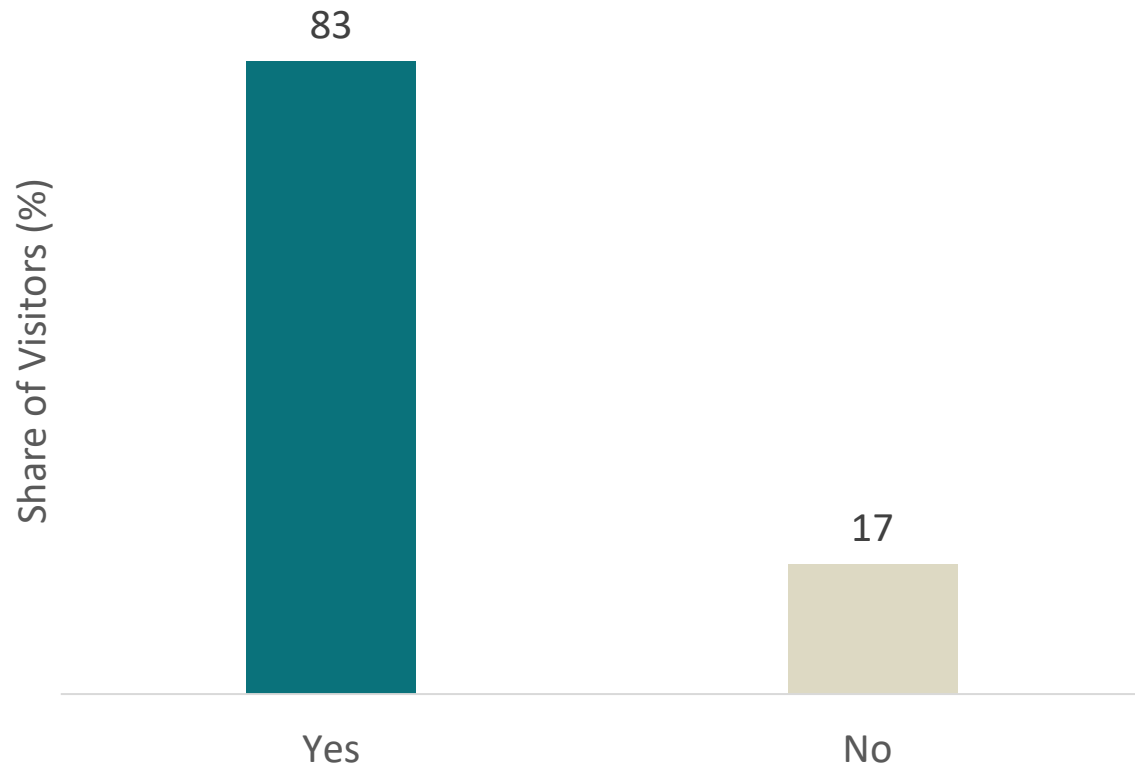
Better arrival hall with more staff to deal with a plane load of people.

Hotels need to be inspected prior to reopening.

Hotel to be better equipped for tourist following Covid.

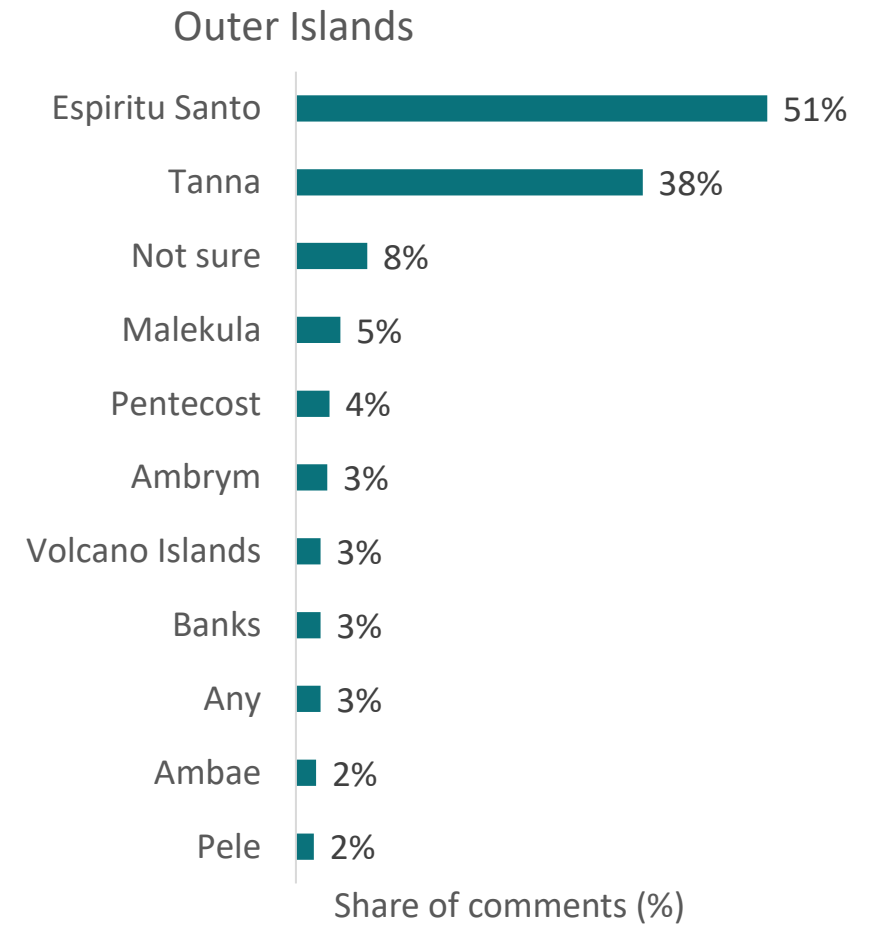
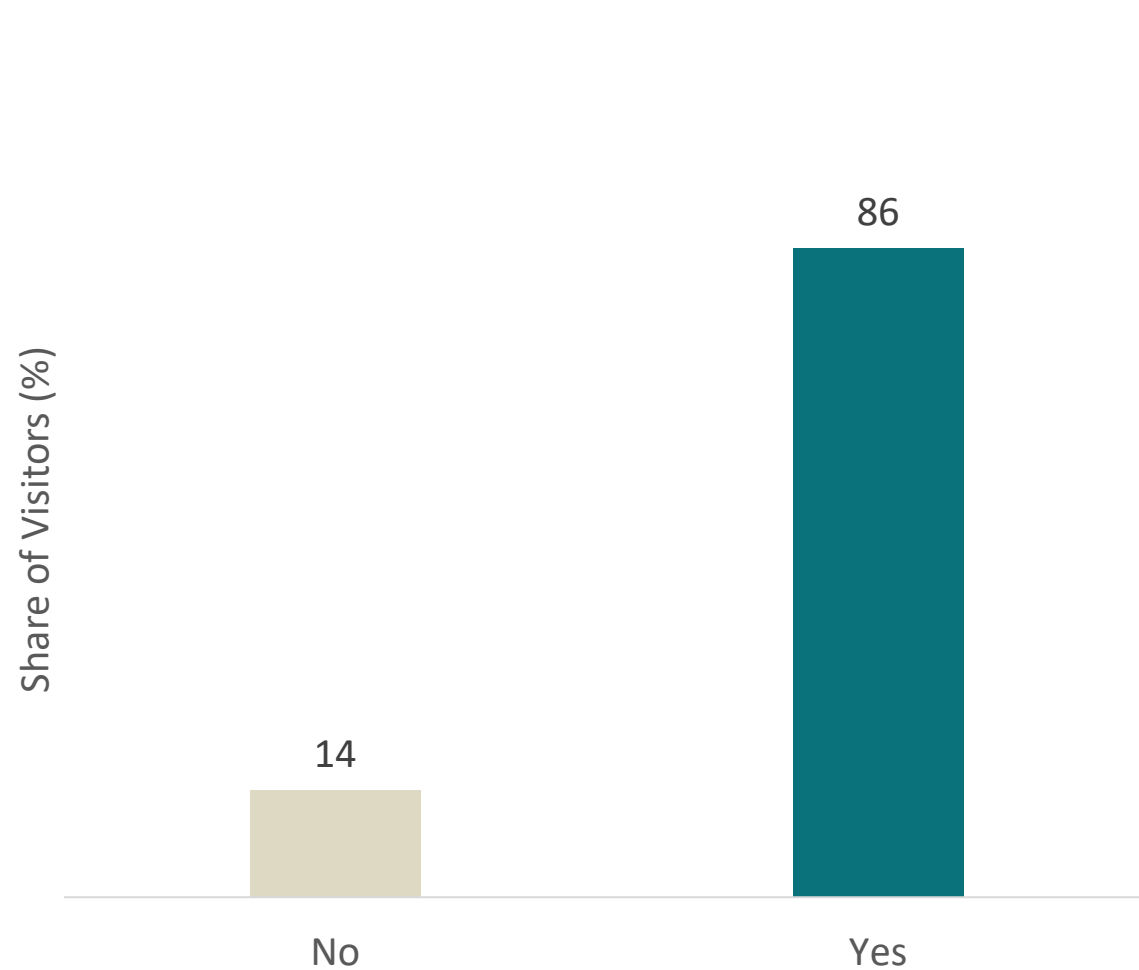
Finding food that was inexpensive but not burgers and chips was very difficult. It seems like tourists are expected to just eat at expensive restaurants. No good street food.

# Willingness to Return



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

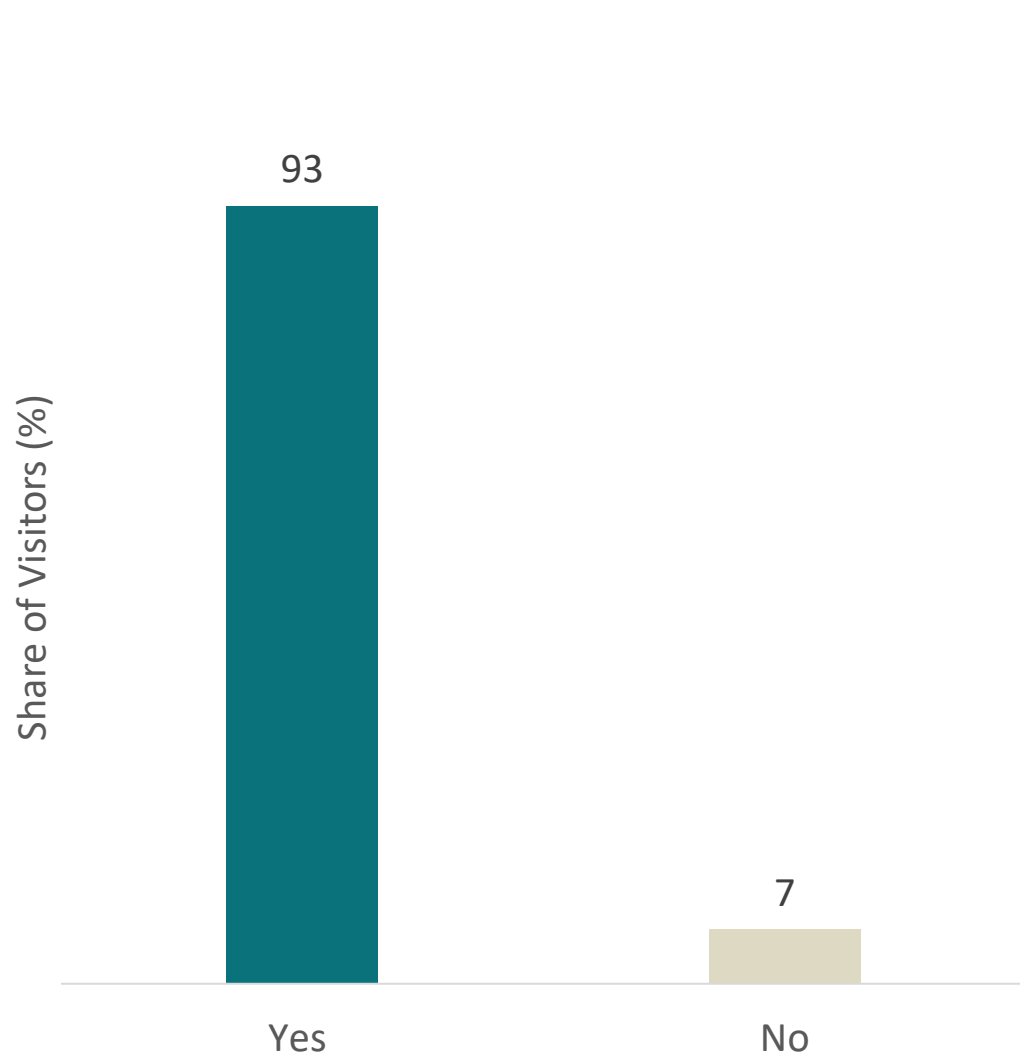
# Willingness to Visit Outer Islands



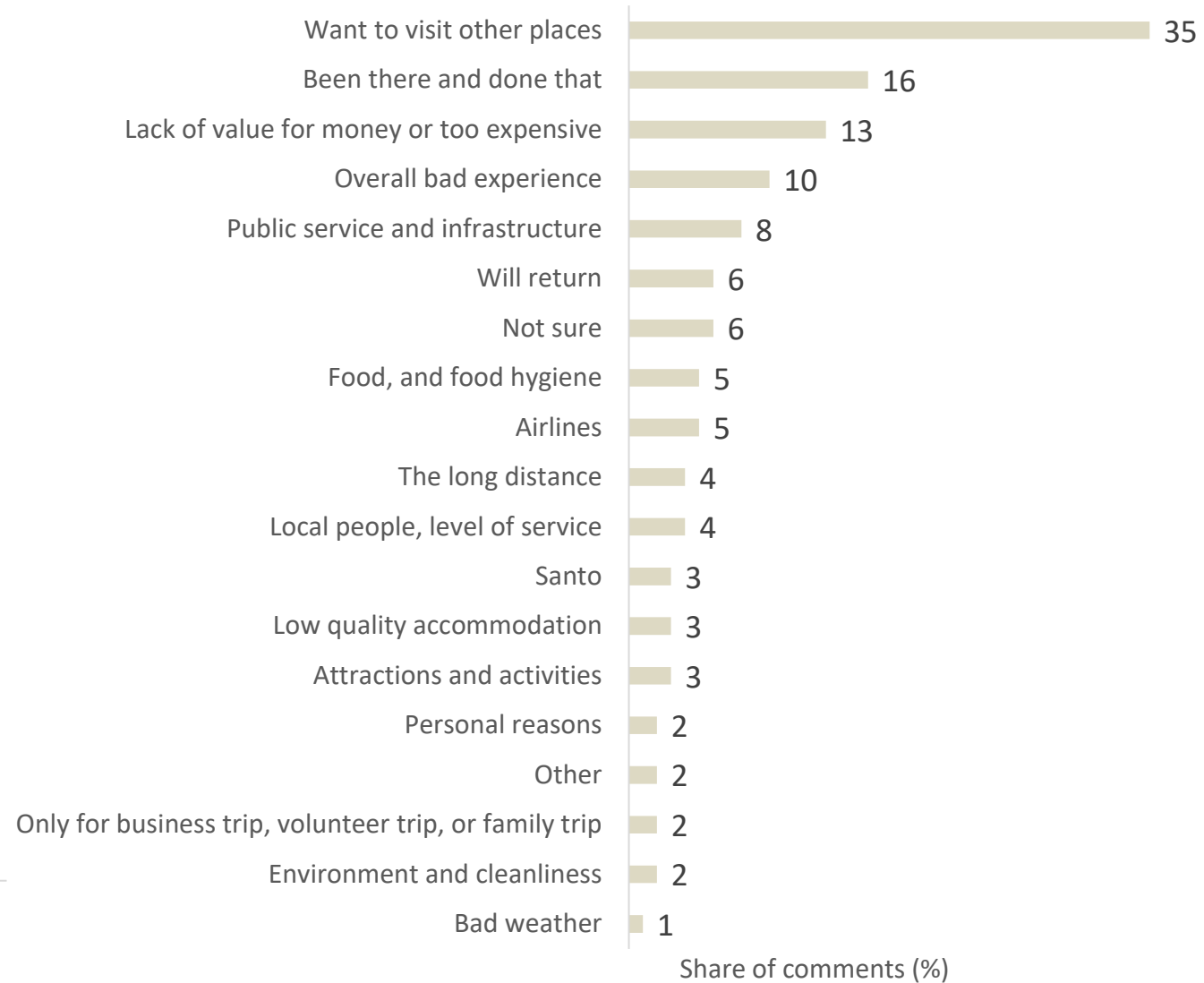
*Note: Multiple responses, therefore total does not add up to 100%*



# Willingness to Recommend



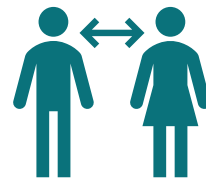
## Reasons for Not Recommend



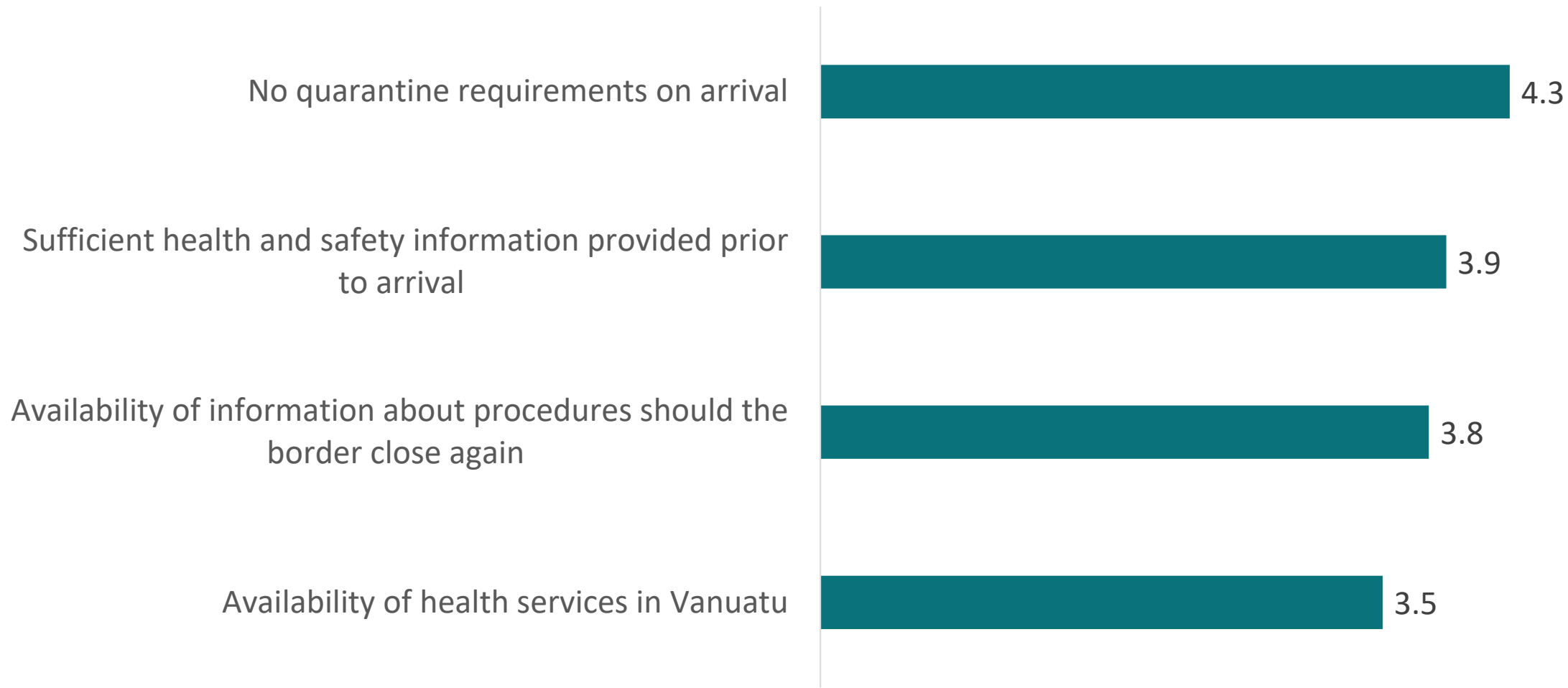
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2022 JUL-SEP VISITORS

COVID RESPONSES

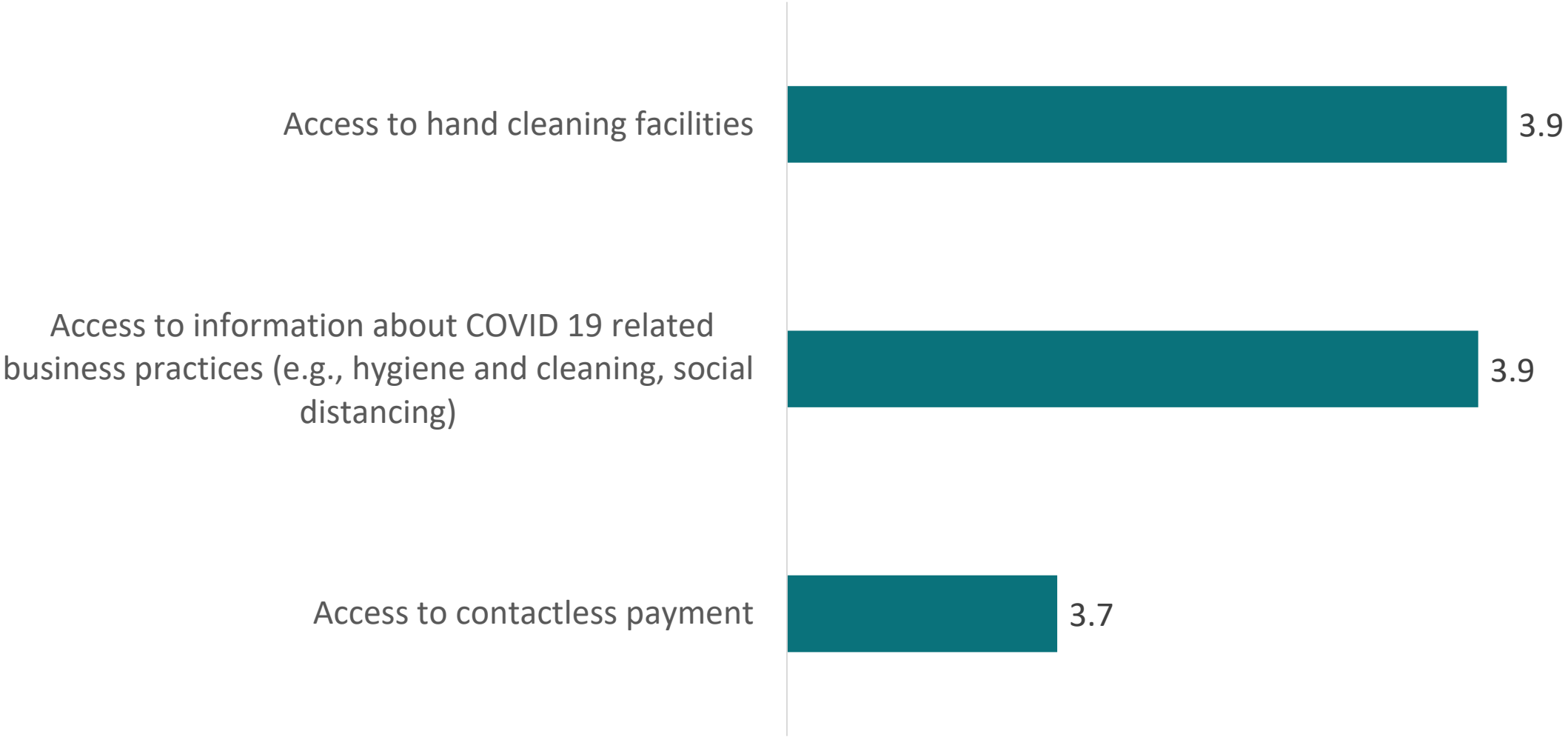


**Q** How important were the following factors in your decision to travel to Vanuatu?



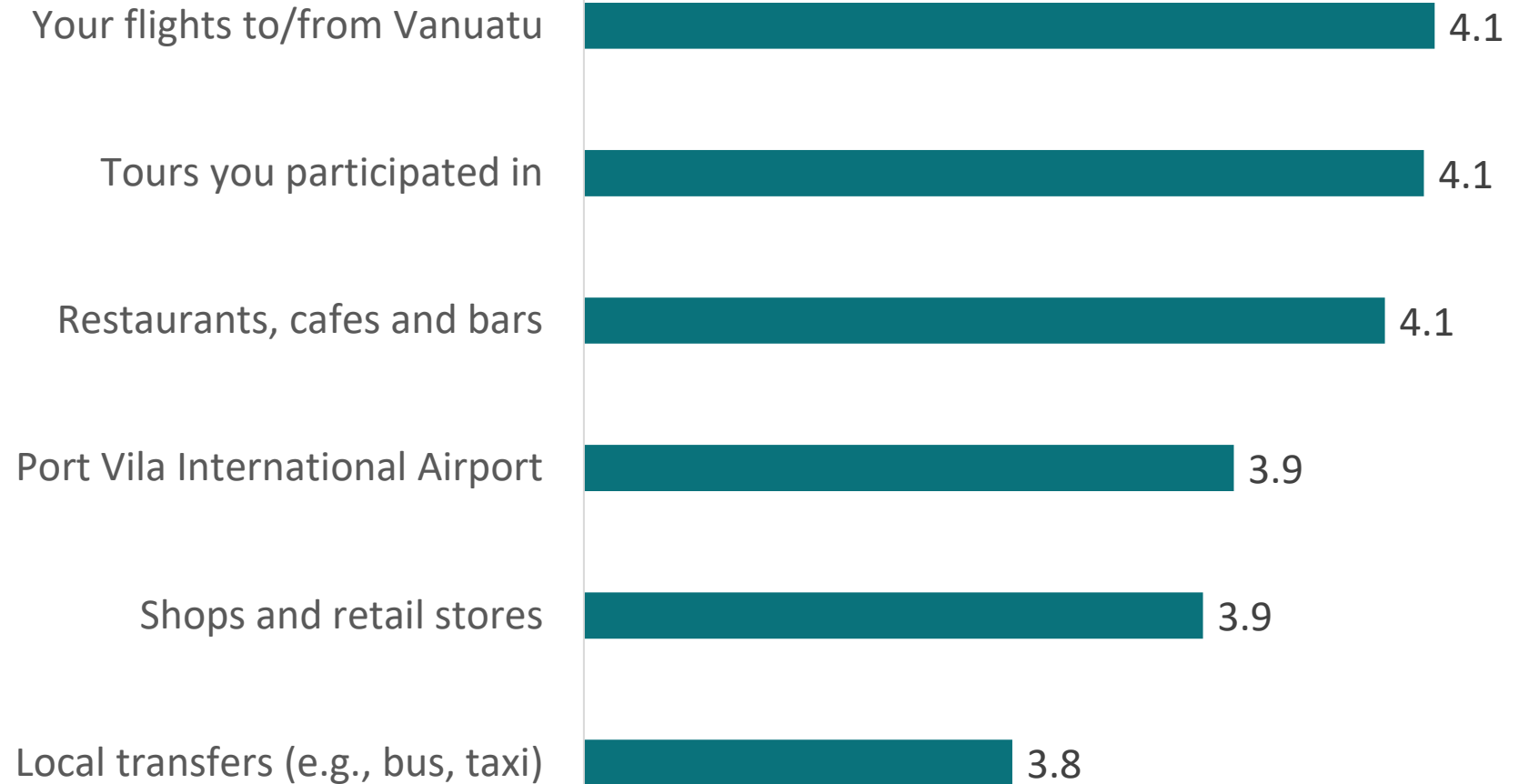
Scale: 1=Not important at all to 5=Very important

**Q** Satisfaction with COVID practices



Scale: 1=Very dissatisfied to 5=Very satisfied

## Q Satisfaction with Health and Safety Measures



Scale: 1=Very dissatisfied to 5=Very satisfied



NEW ZEALAND  
FOREIGN AFFAIRS & TRADE  
MANATŪ AORERE



# Thank you

Authorship: B. Bai, J. Yi, J. Mehen, M. Leonhartsberger, P. Kim and M. Orams