

VANUATU INTERNATIONAL VISITOR SURVEY

Visitor insights and pre-COVID benchmarking

Jan – Jun 2023



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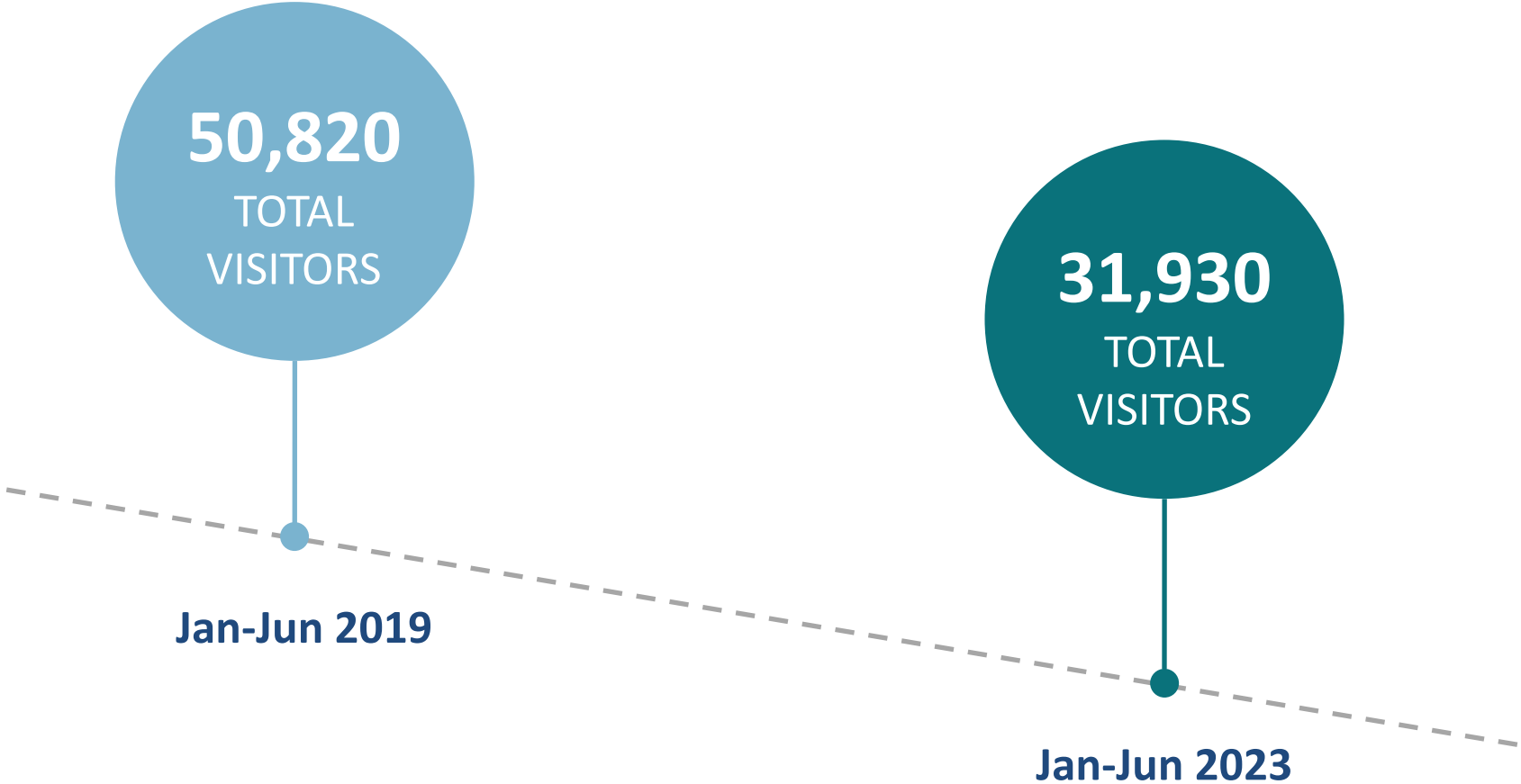


NEW ZEALAND
FOREIGN AFFAIRS & TRADE
MANATU AORERE

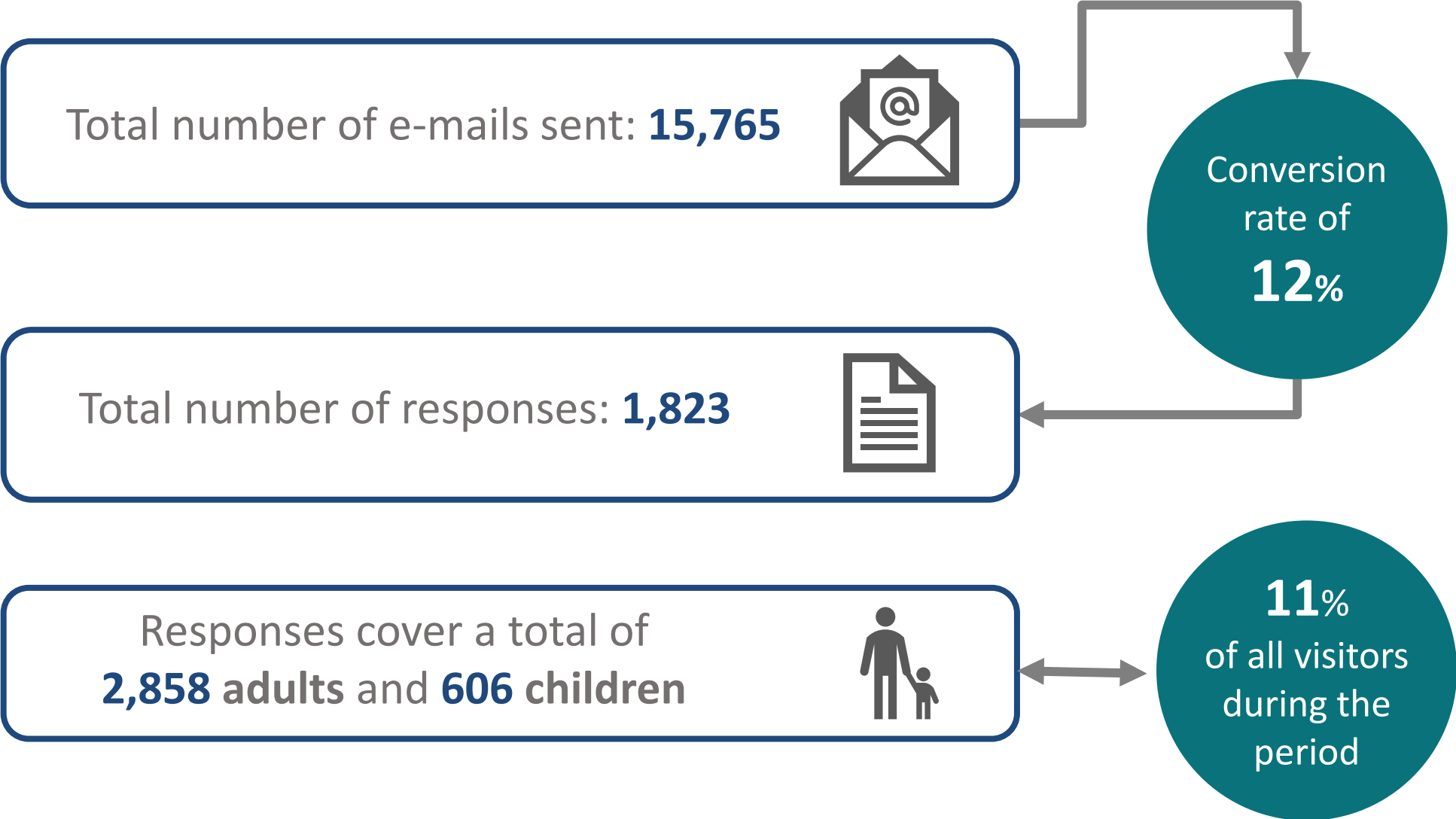
Background

- IVS data from January to June 2023 is analysed to help us understand the visitor experience and gain insights into tourism recovery after the border reopening in July 2022.
- Key comparison analyses are carried out between this 6-month report and January to June 2019 IVS results.
- **N.B.** Vanuatu was hit by two cyclones and an earthquake in early March 2023, which caused widespread damage to the local environment and severe disruptions to tourists' arrivals and travel experience.
- All analyses are conducted based on weighting factors derived from the actual international arrivals of the main source markets to Vanuatu.
- All reports from the IVS are available at [Pacific Tourism Data Initiative Resource Page](#)

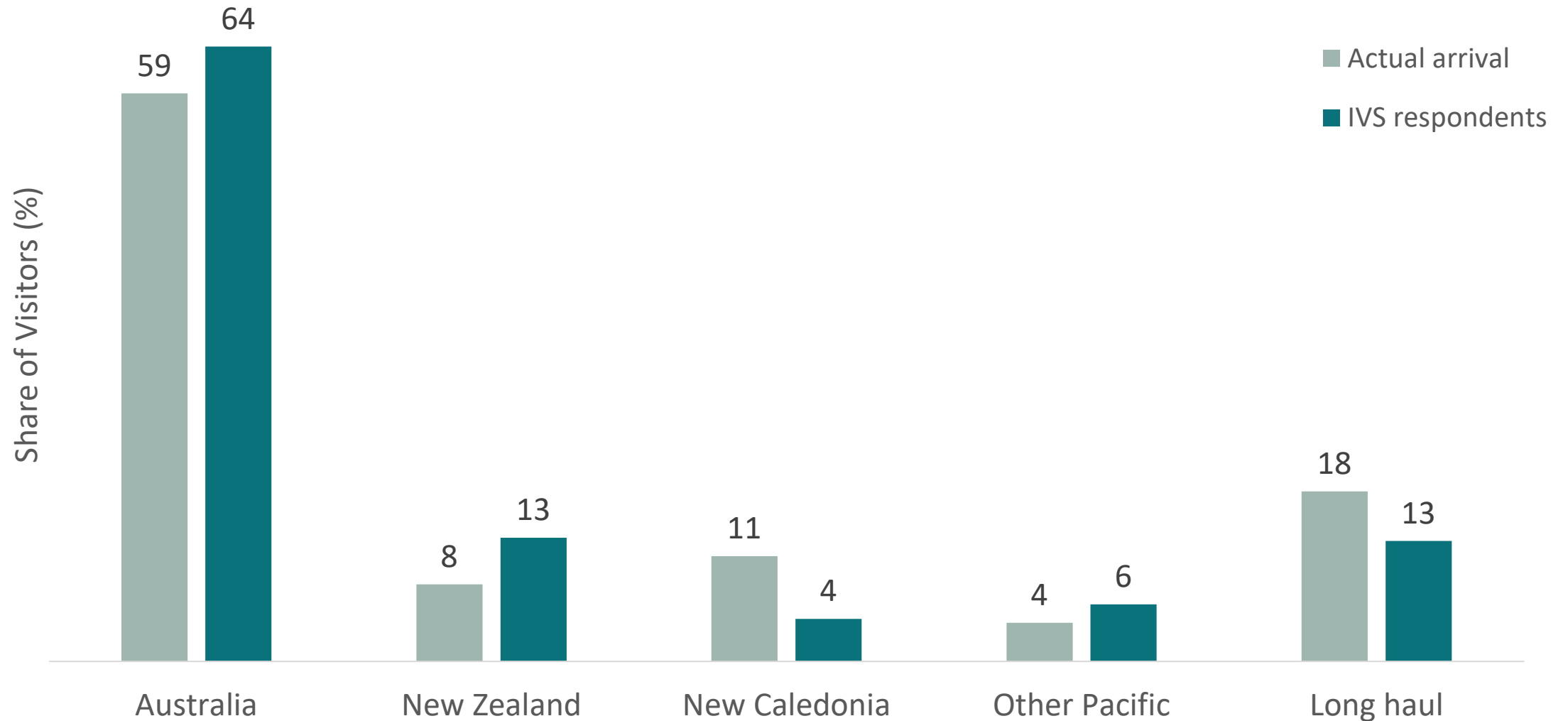
Total number of visitors



Respondents (Jan-Jun 2023)



Country of residence: Actual arrival vs. IVS data Jan – Jun 2023



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

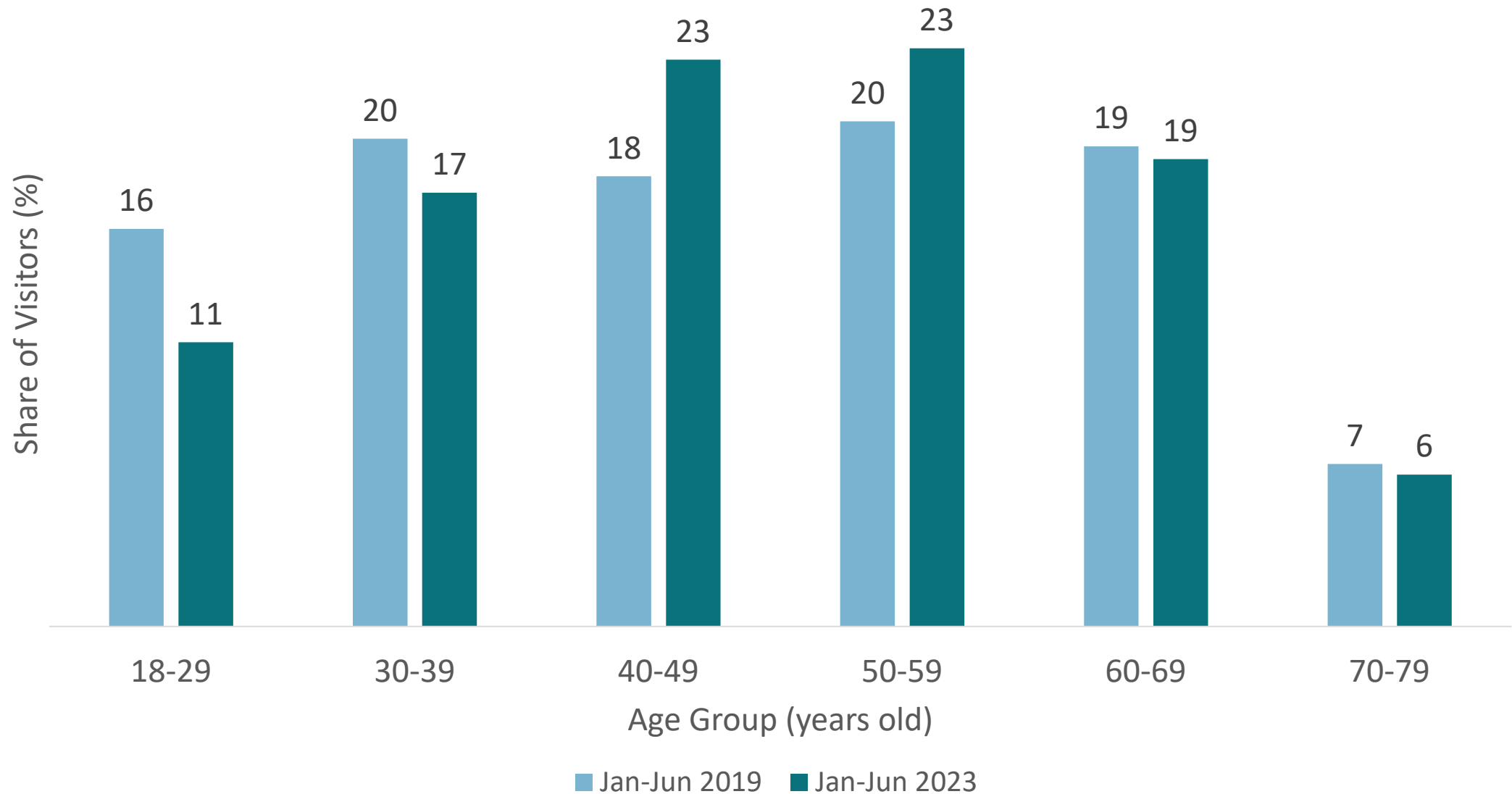


Visitor Spending
and Impact



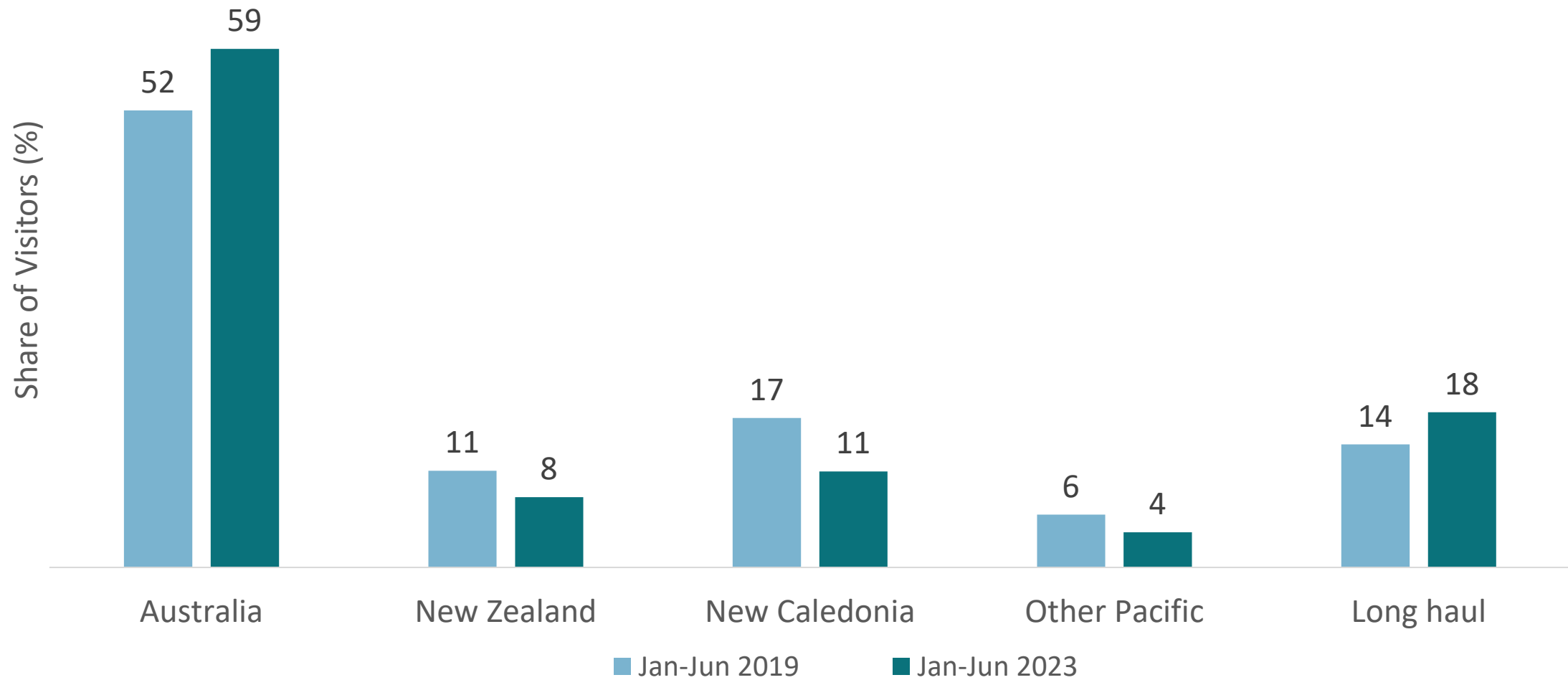
Visitor
Satisfaction

Age profile



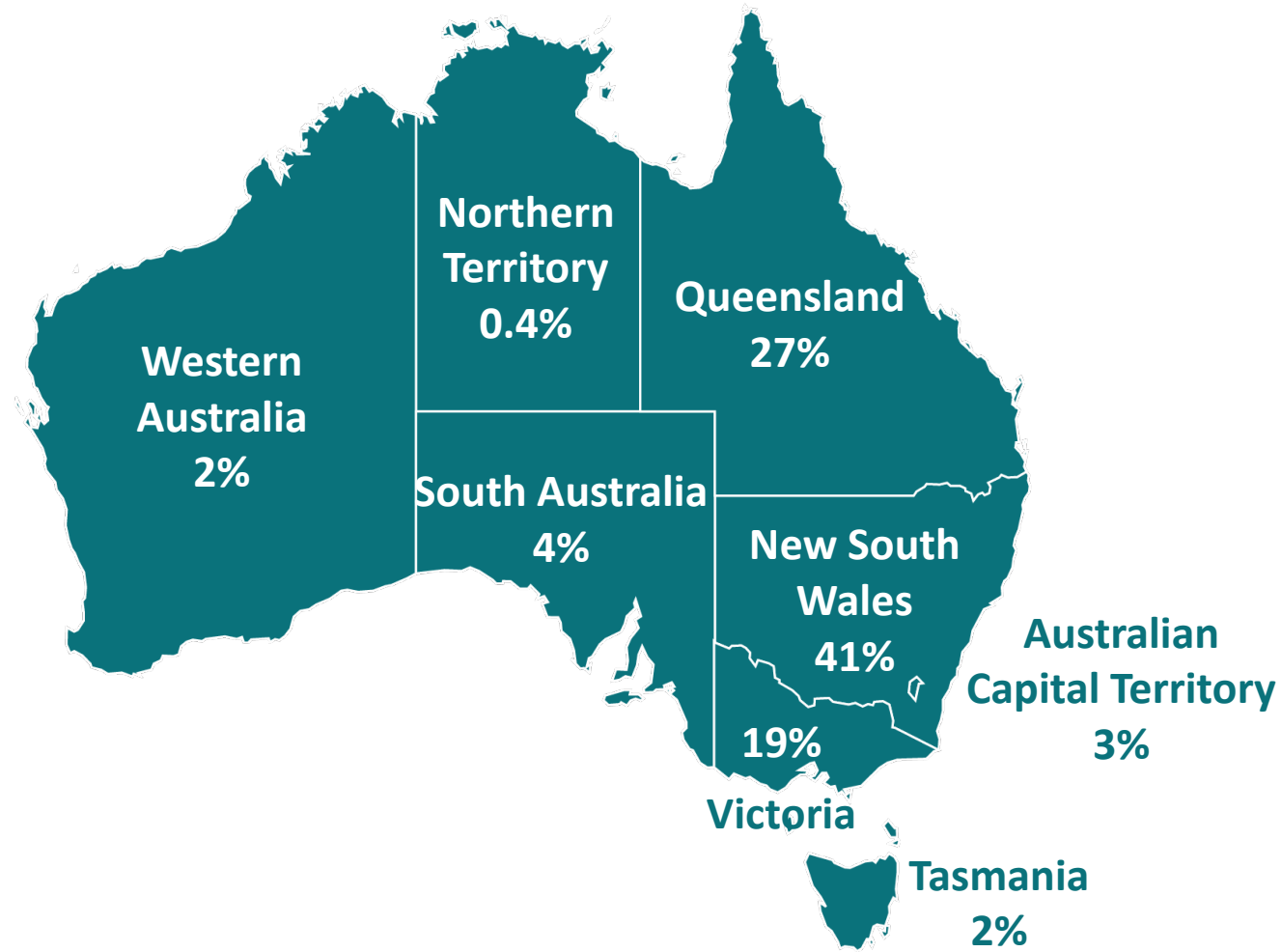
Note: due to rounding, total does not sum to 100%

Country of residence-actual arrival: Jan-Jun 2019 vs. Jan-Jun 2023



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

Australian respondents - IVS respondent data Jan-Jun 2023

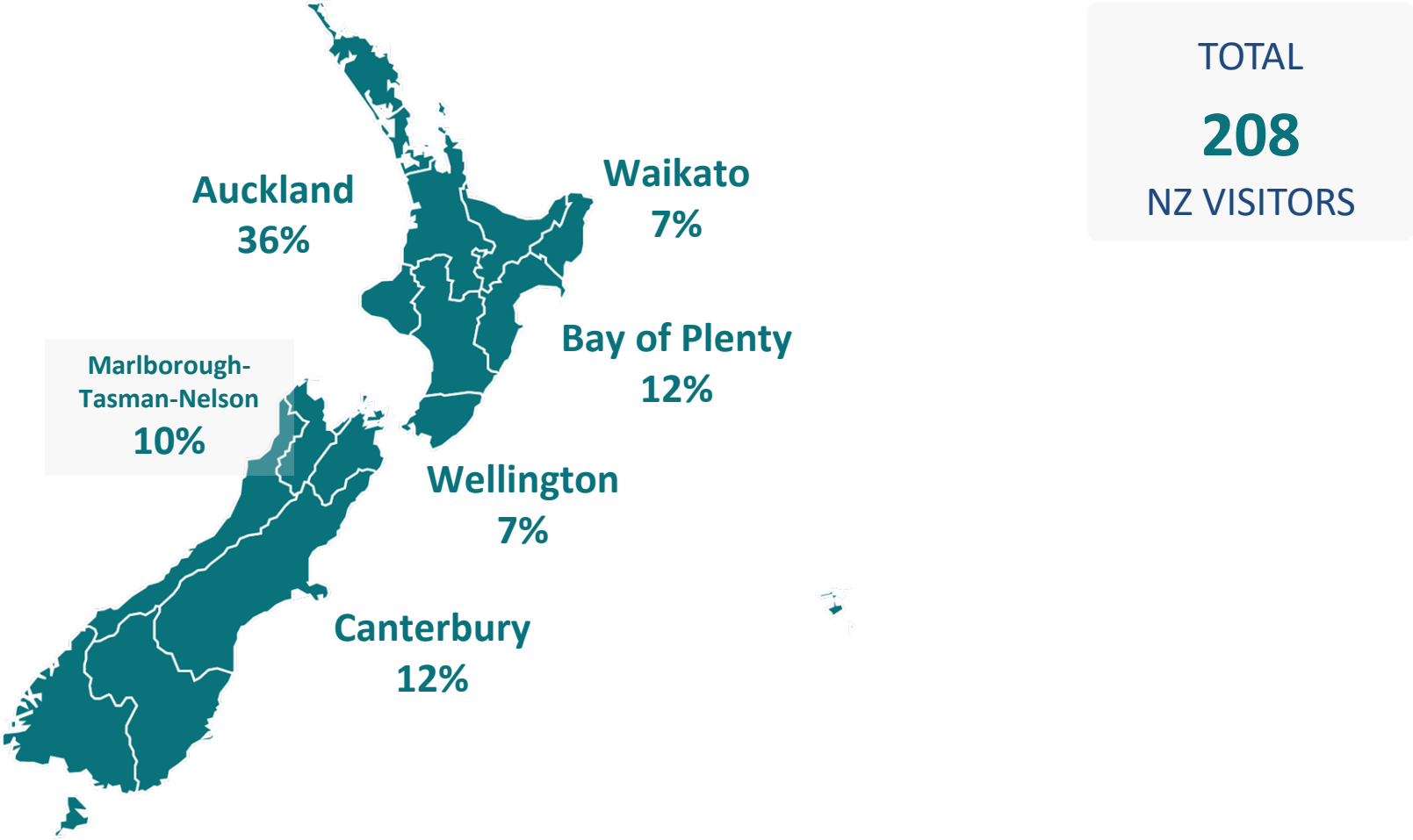


TOTAL
956
AU VISITORS

New South Wales, Queensland and Victoria make up **87%** of all Australian visitor arrivals

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

New Zealand respondents - IVS respondent data Jan-Jun 2023



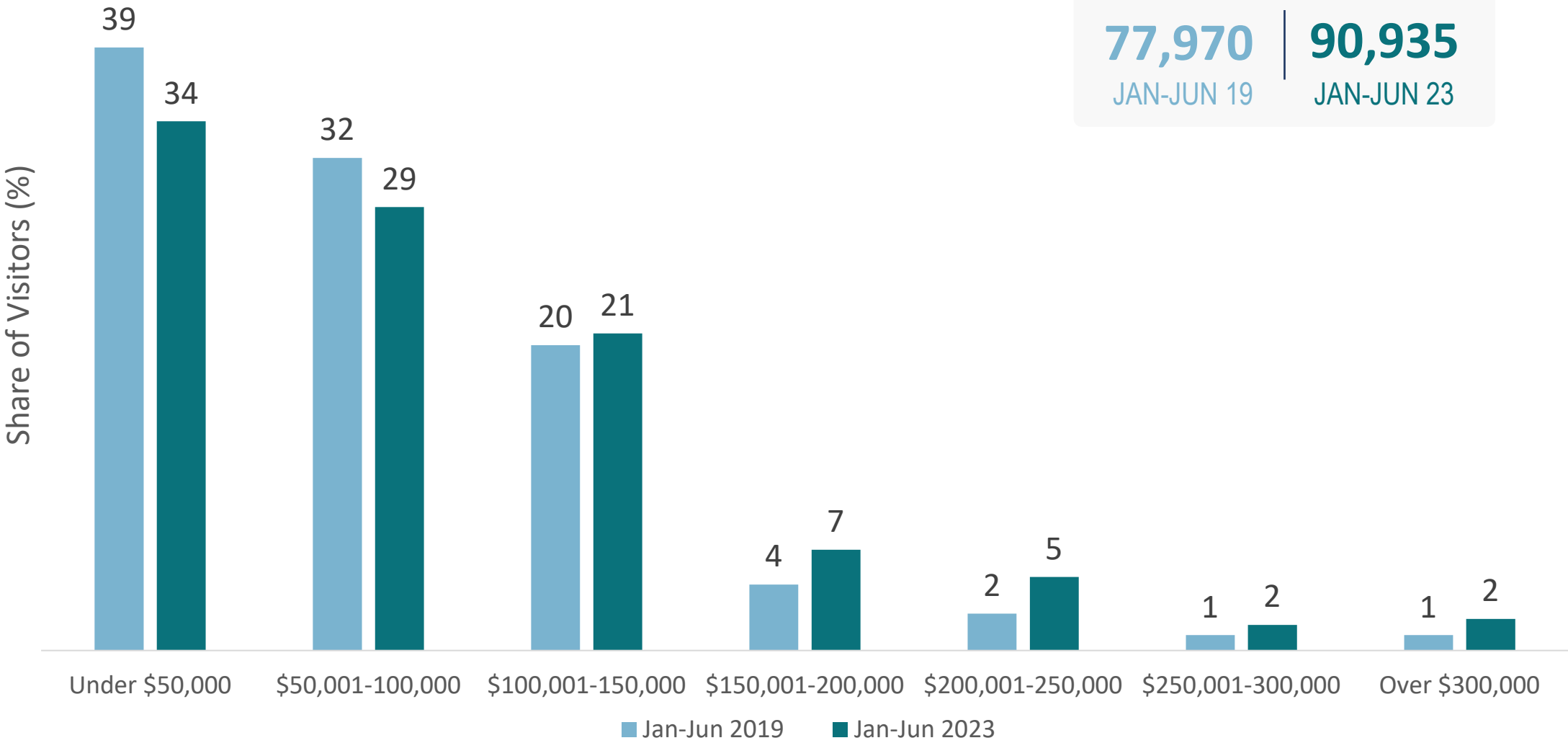
Auckland, Waikato, Wellington, Canterbury, and Bay of Plenty make up **75%** of all New Zealand visitor arrivals.

N.B. Visitors from Marlborough-Tasman-Nelson has reached 10% of NZ travellers, increased by 67% from 2019.

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

Annual household income

AVG. HOUSEHOLD INCOME
77,970 | **90,935**
JAN-JUN 19 | JAN-JUN 23



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

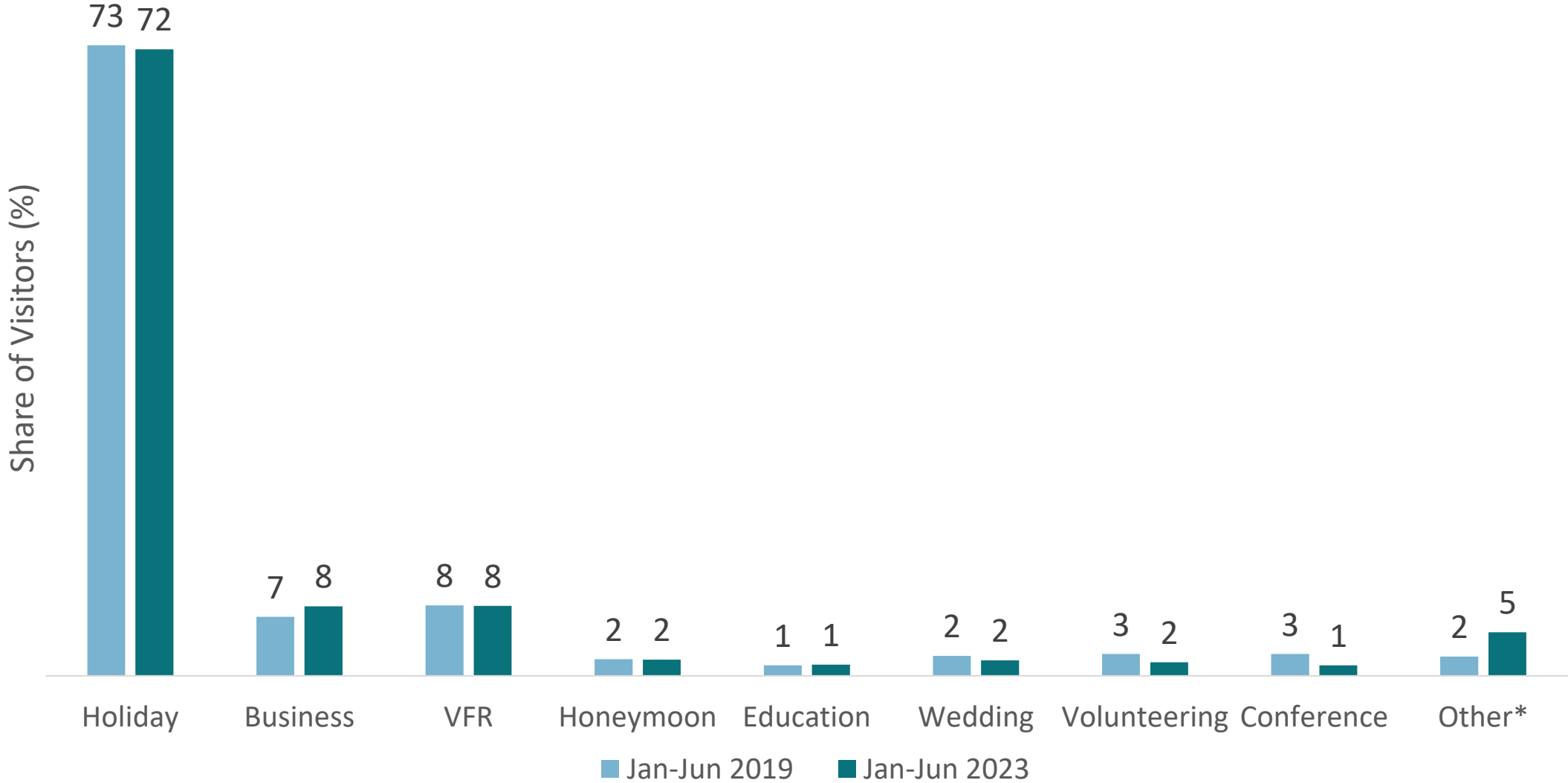


Visitor Spending
and Impact



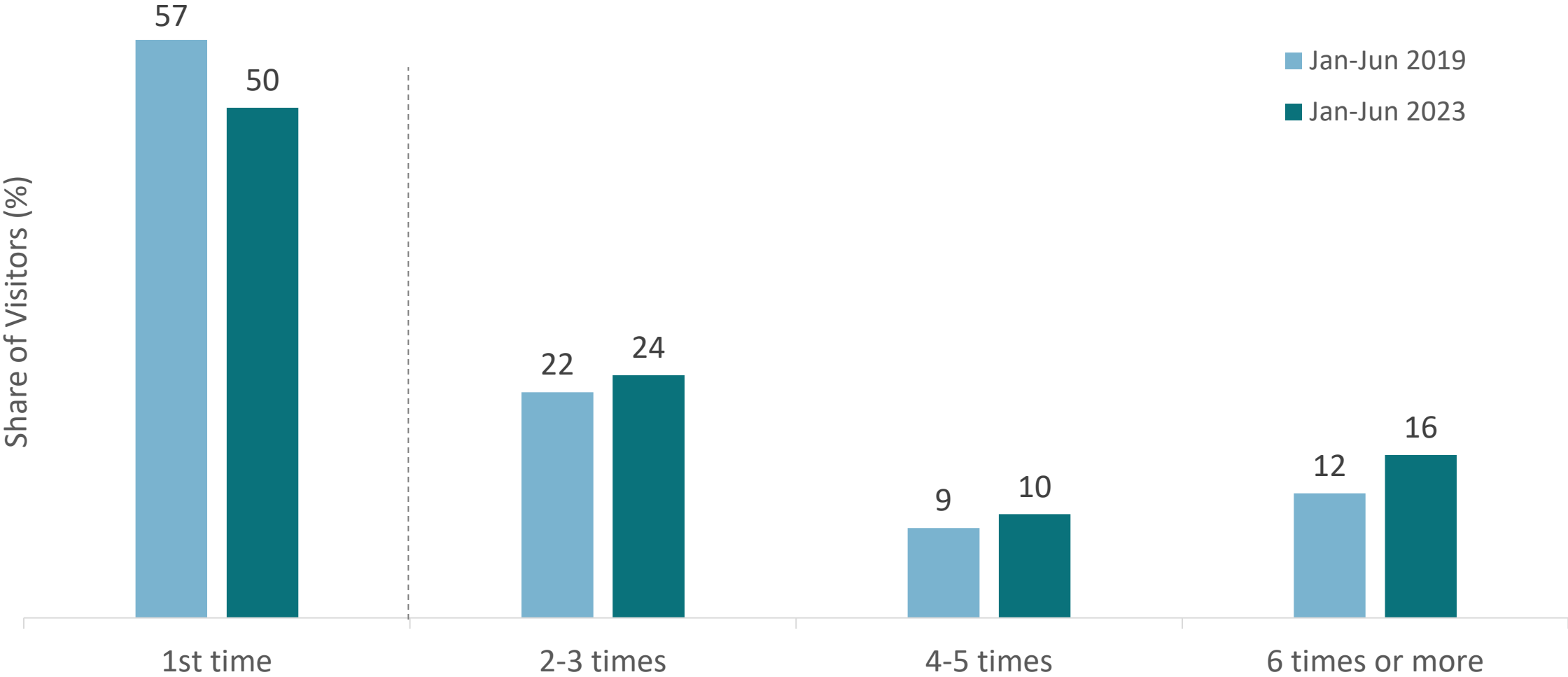
Visitor
Satisfaction

Purpose of visit



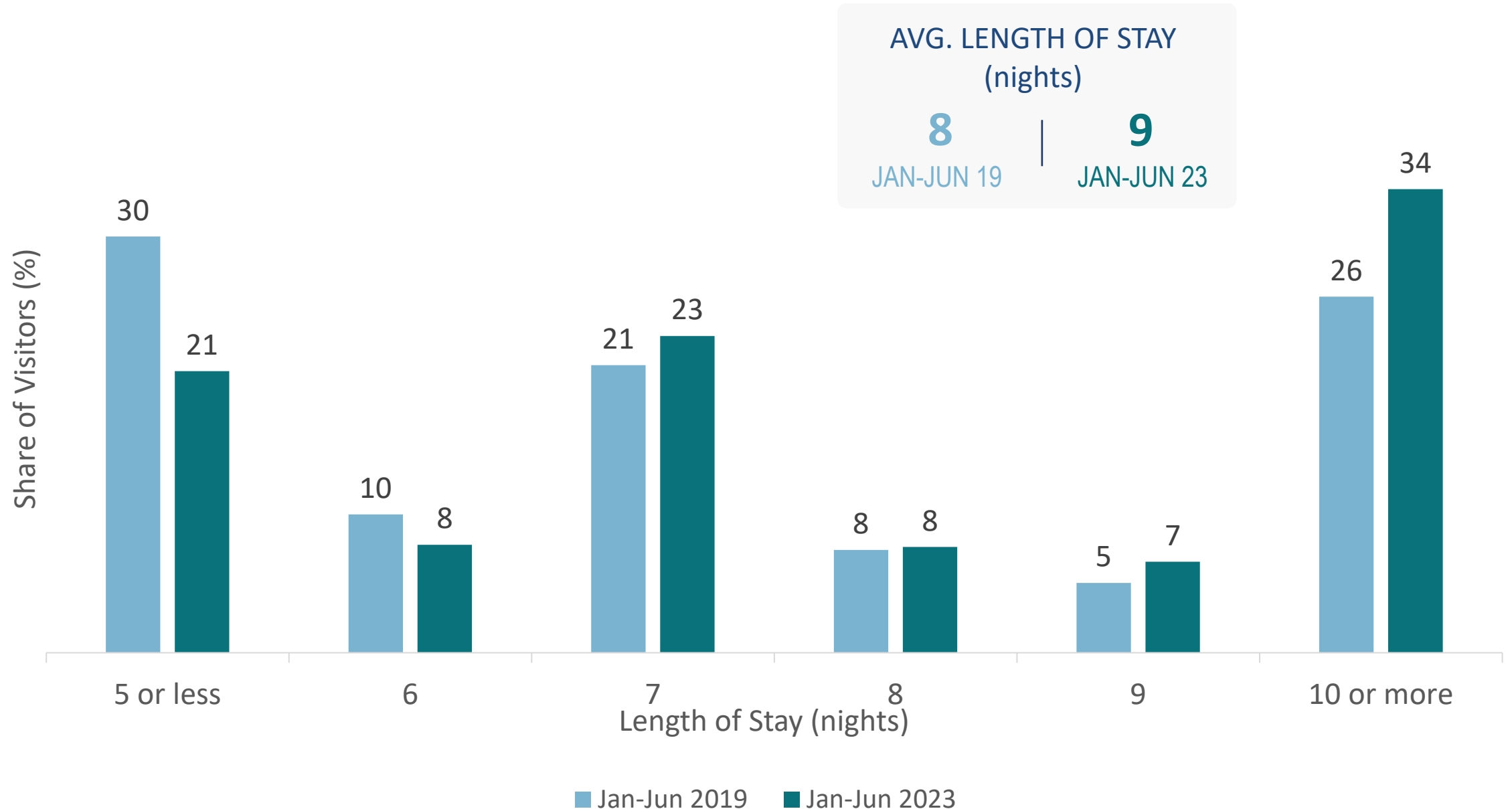
Note: due to rounding, total does not sum to 100%; *Other: including family reunion/funeral

Previous visits



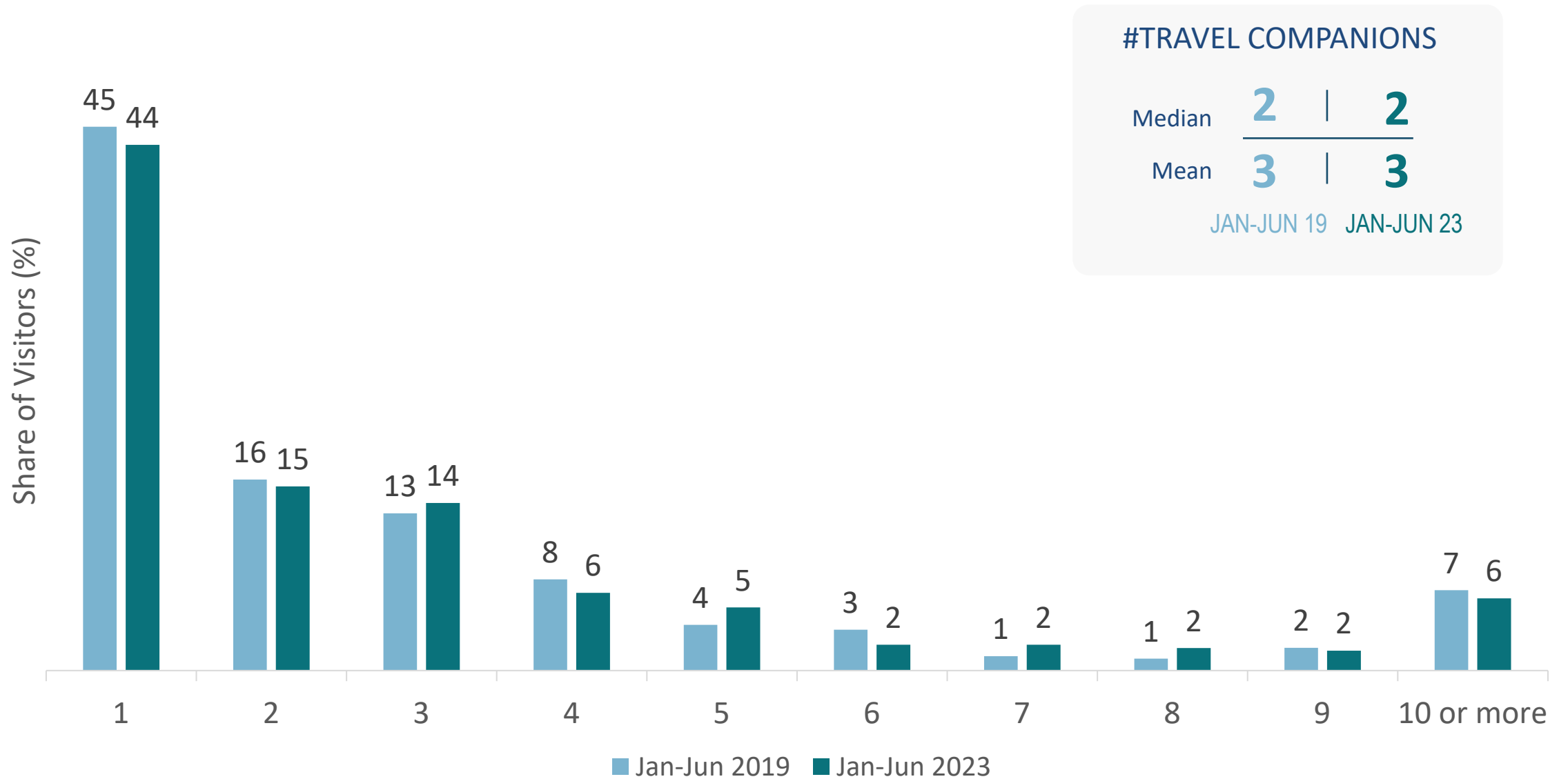
Note: due to rounding, total does not sum to 100%

Length of stay (nights)



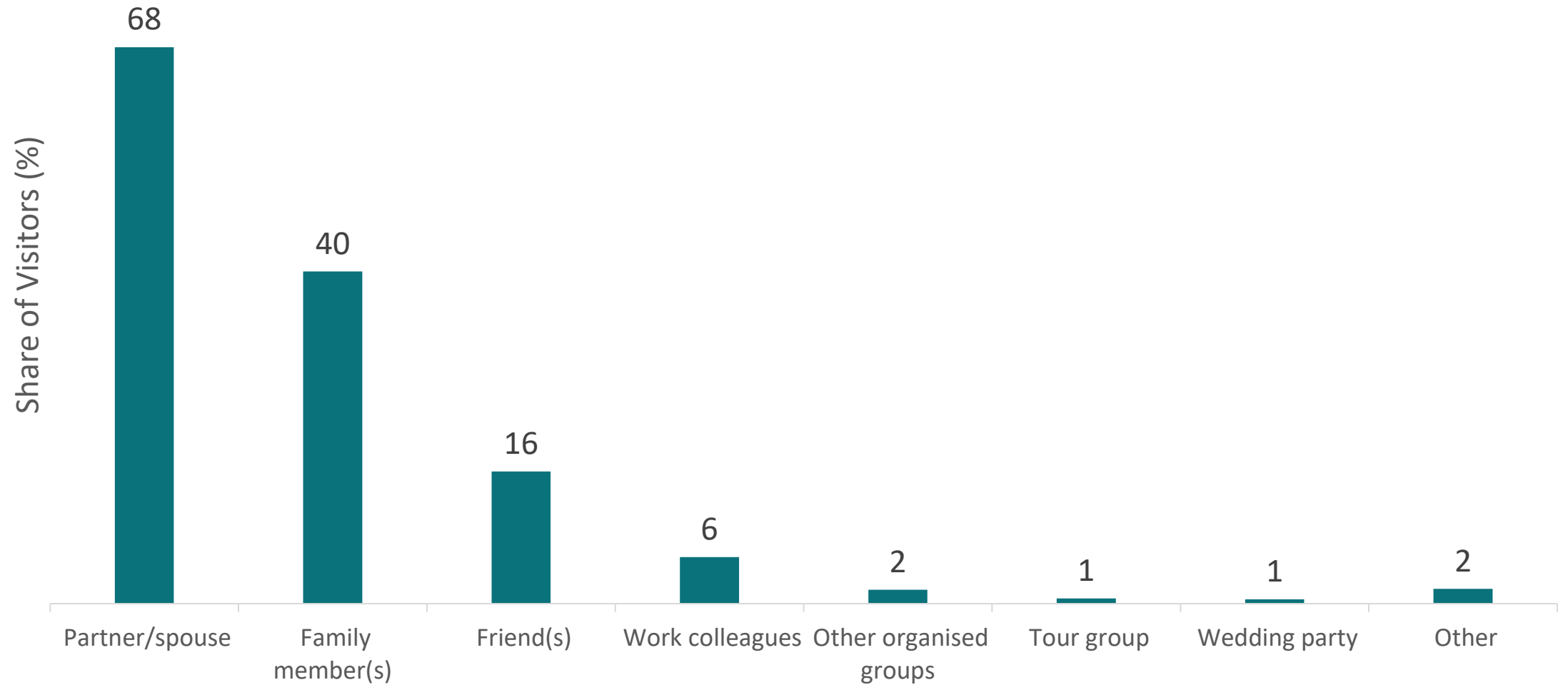
Note: 31 and 31+ days as outliers were removed for length of stay analysis

Travel group size



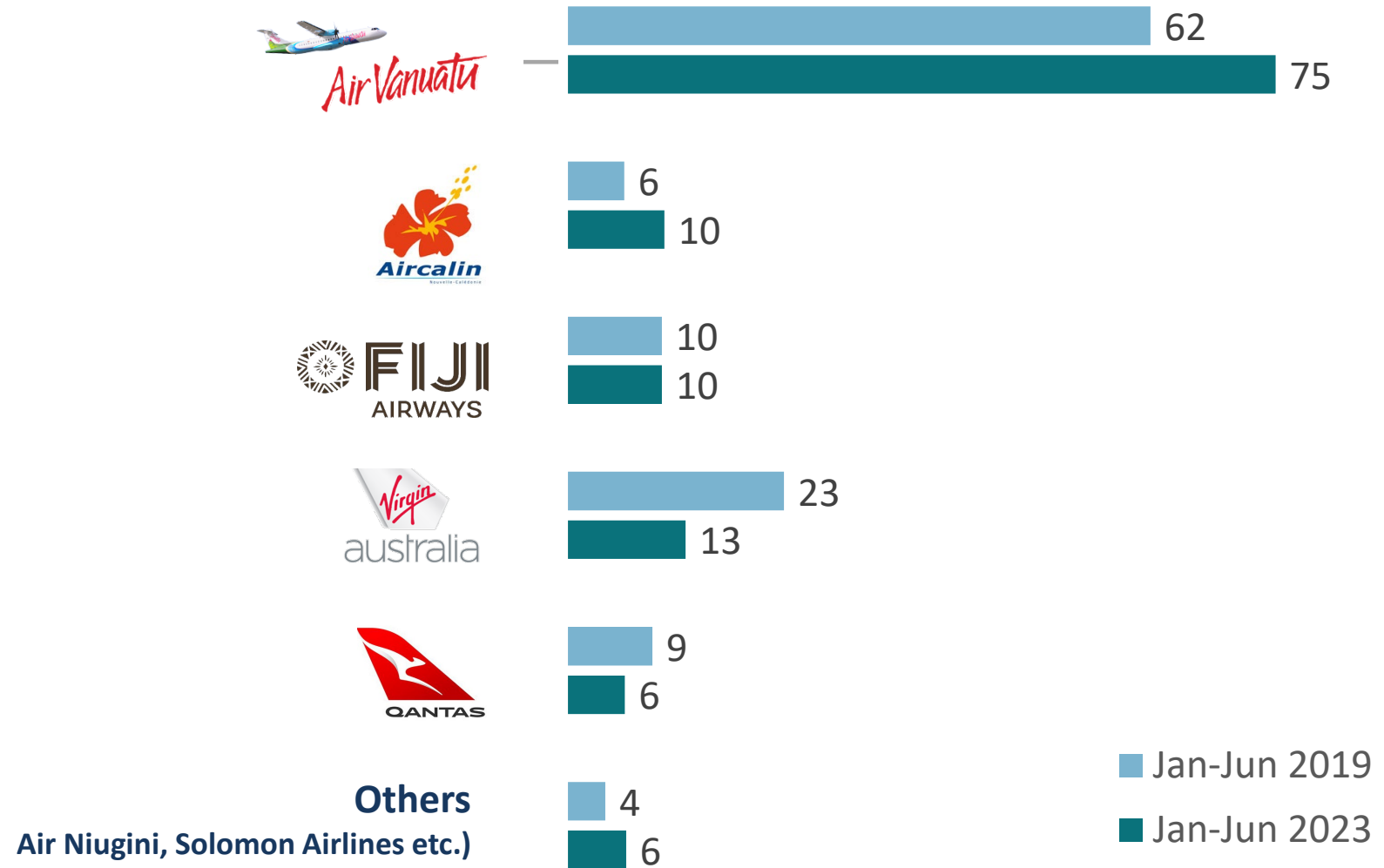
Note: Due to rounding, total does not sum to 100%; Analysis based on visitors who travel with companions N=1,176.

Travel companions



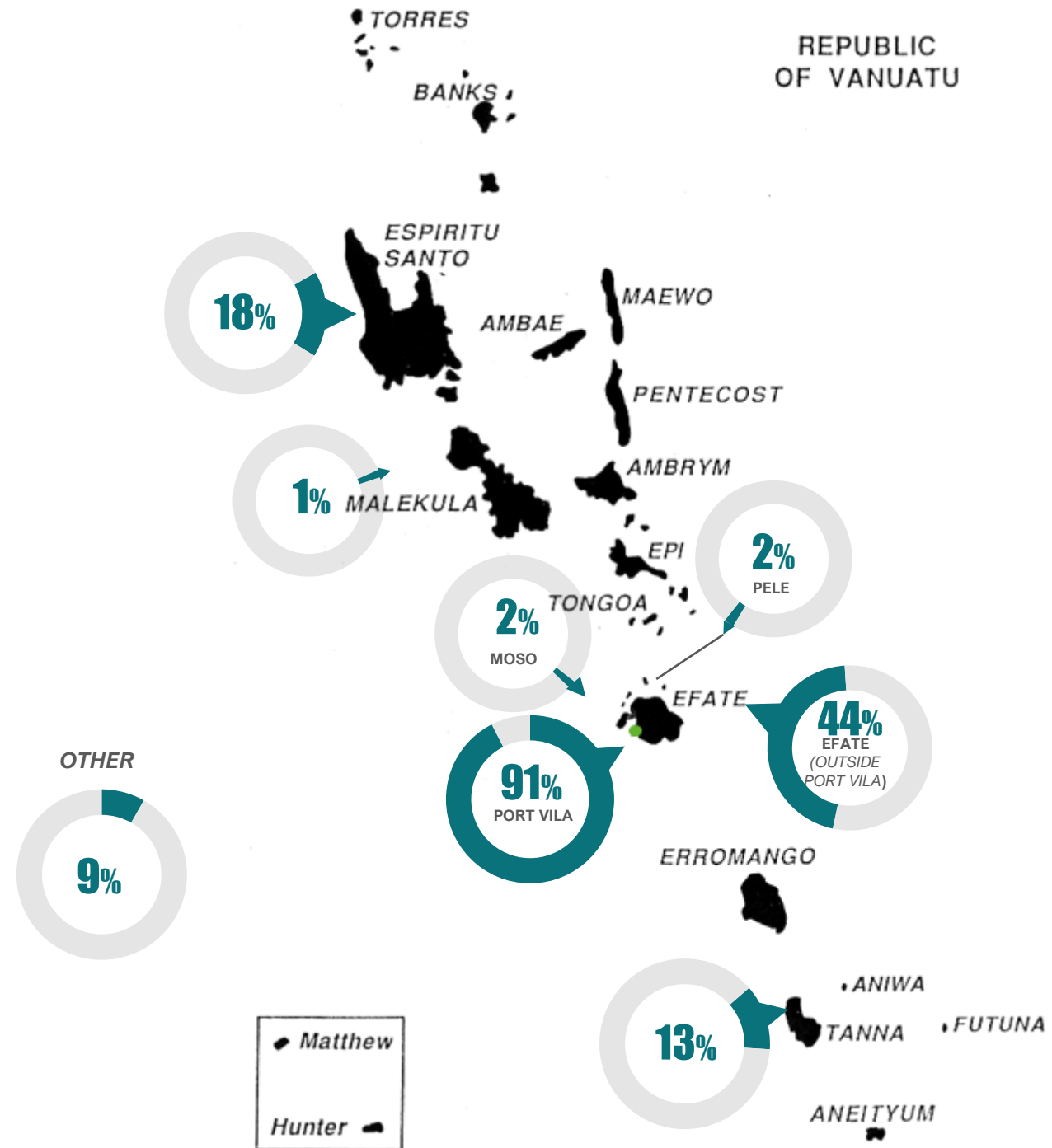
Note: Multiple responses, therefore total does not add up to 100%.

Airlines used for travel



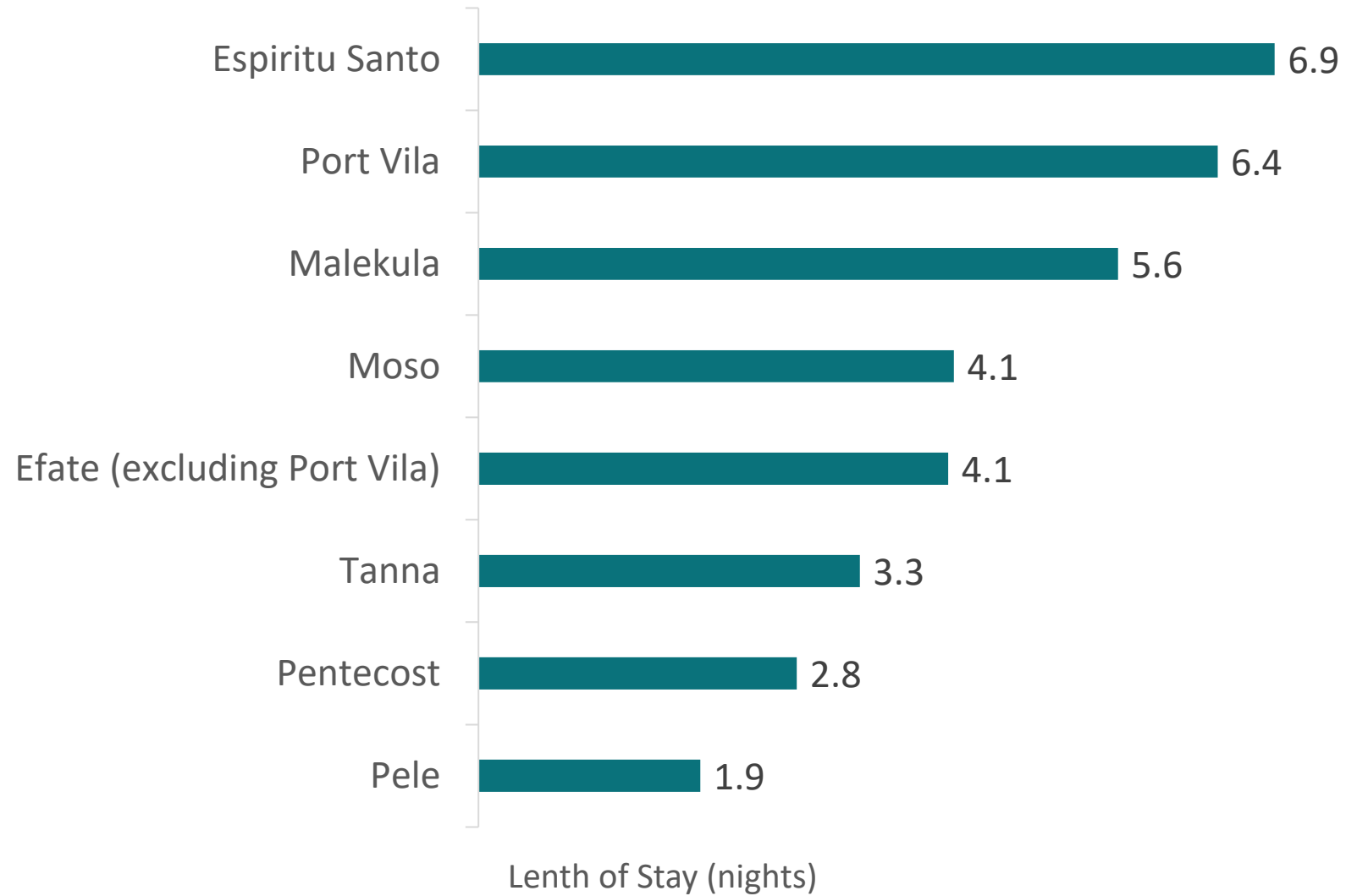
Share of Visitors (%)

Islands visited



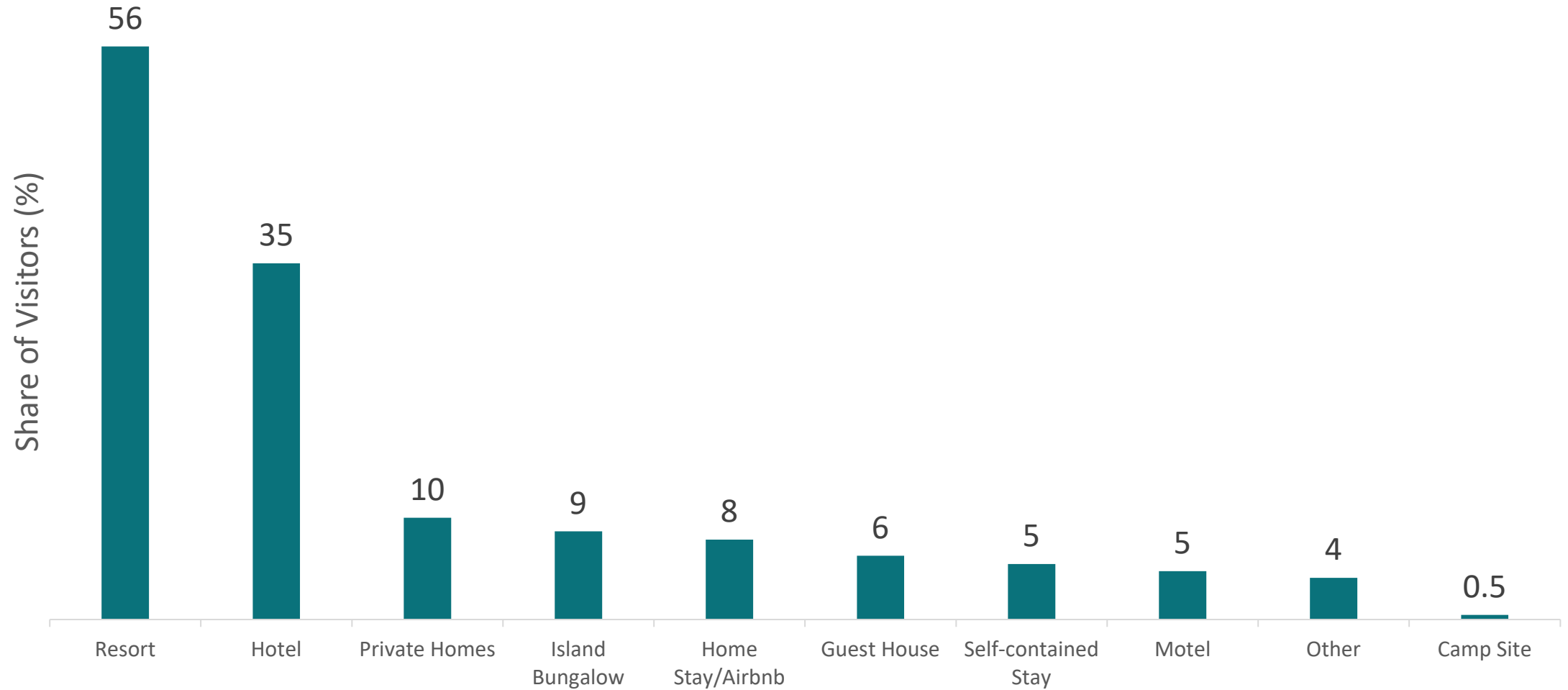
Note: Multiple responses, therefore total does not add up to 100%

Average length of stay on islands



Note: Analysis of LoS on each islands is based on respondents more than 10 visitors.

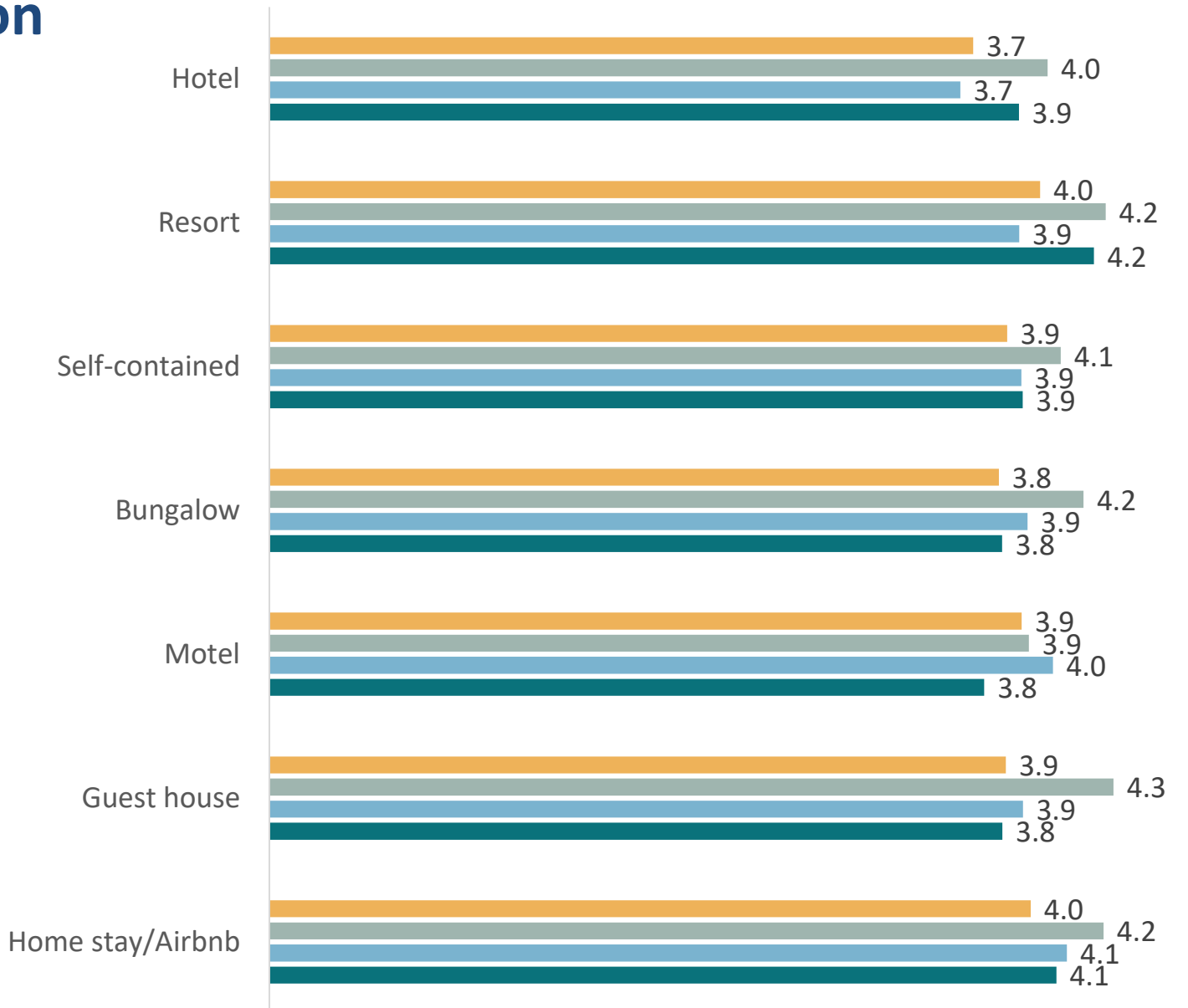
Accommodations



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

Accommodations satisfaction

- The quality, availability and maintenance of facilities provided
- The level of service provided
- The overall value for money
- Health and safety measures at your accommodation (cleanliness, sanitisers etc.)



Scale: 1= Very dissatisfied to 5=Very satisfied

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

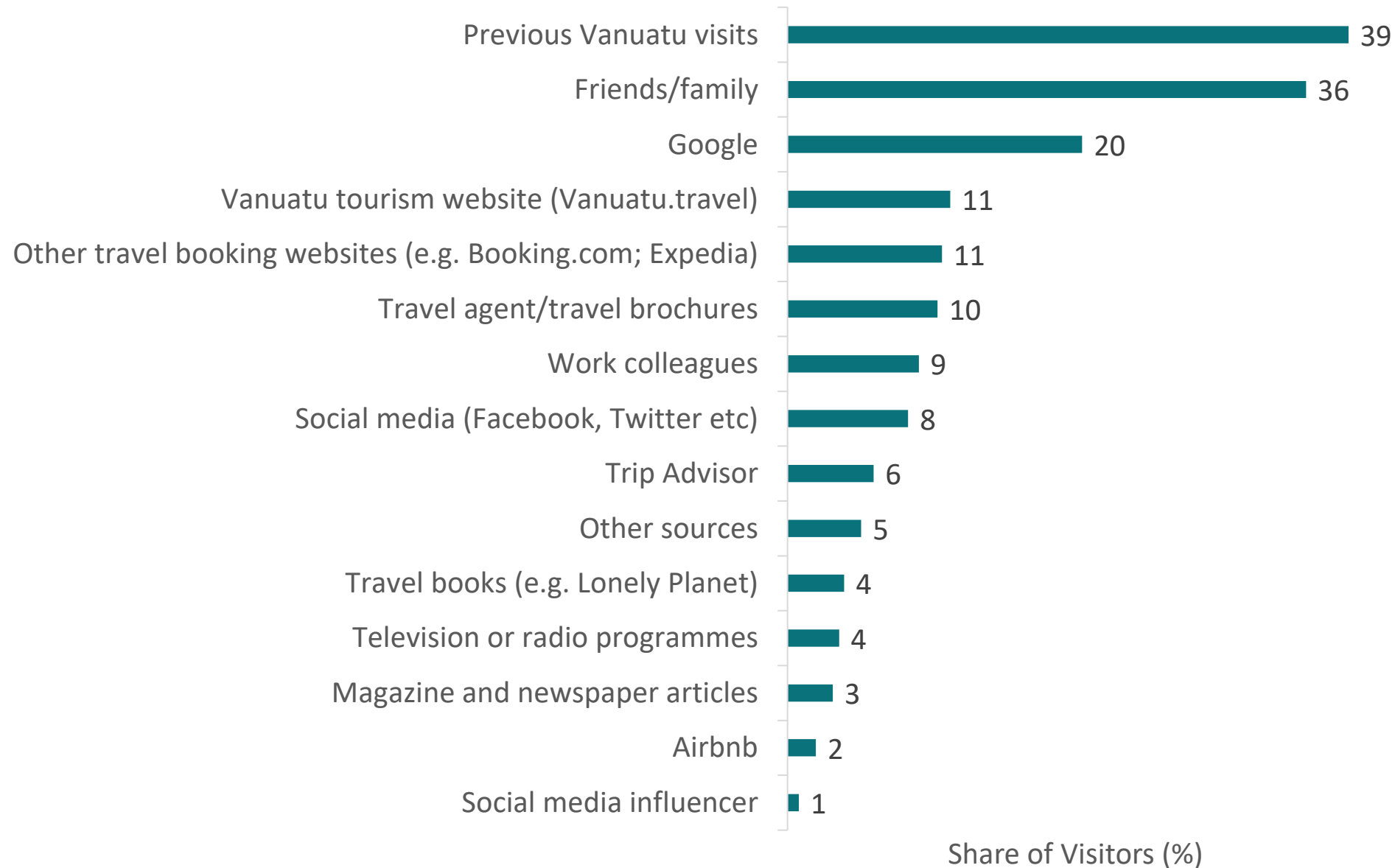


Visitor Spending
and Impact

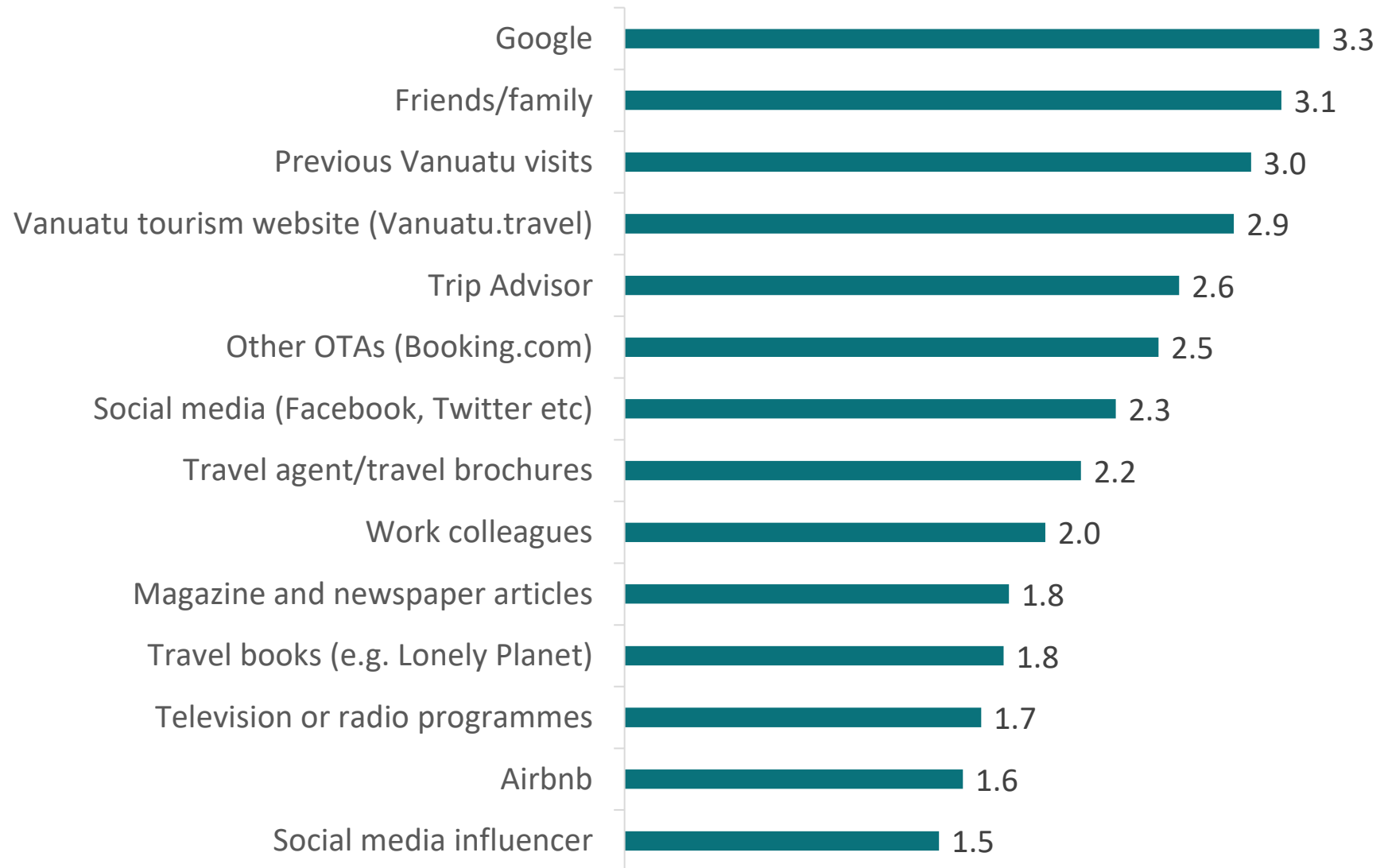


Visitor
Satisfaction

How did you find out about Vanuatu as a destination?

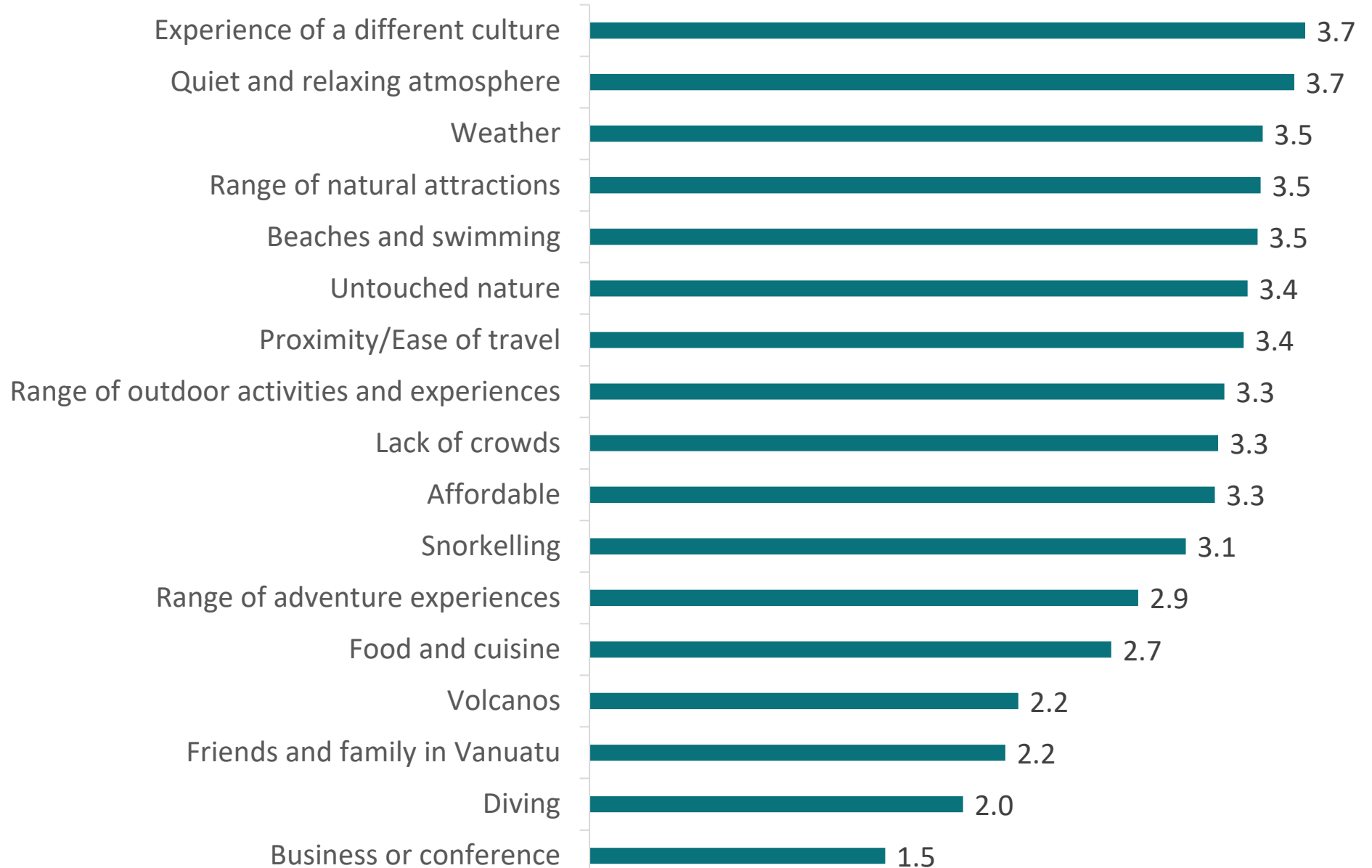


How important were the information sources when planning your trip?



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

Influential factors to travel to Vanuatu



Scale: 1= No influence at all to 5= Prime reason to visit

Method of travel bookings



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

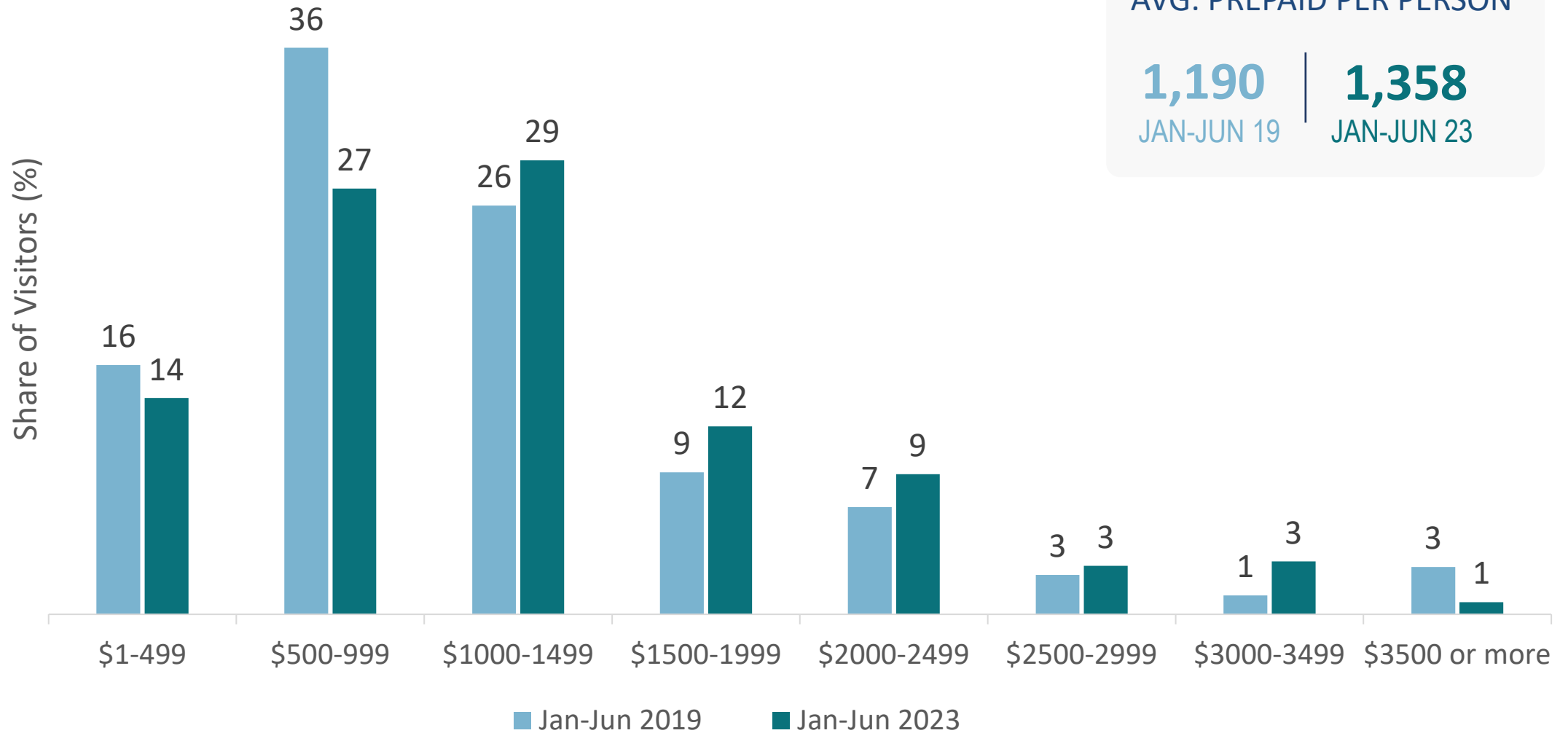


Visitor Spending
and Impact



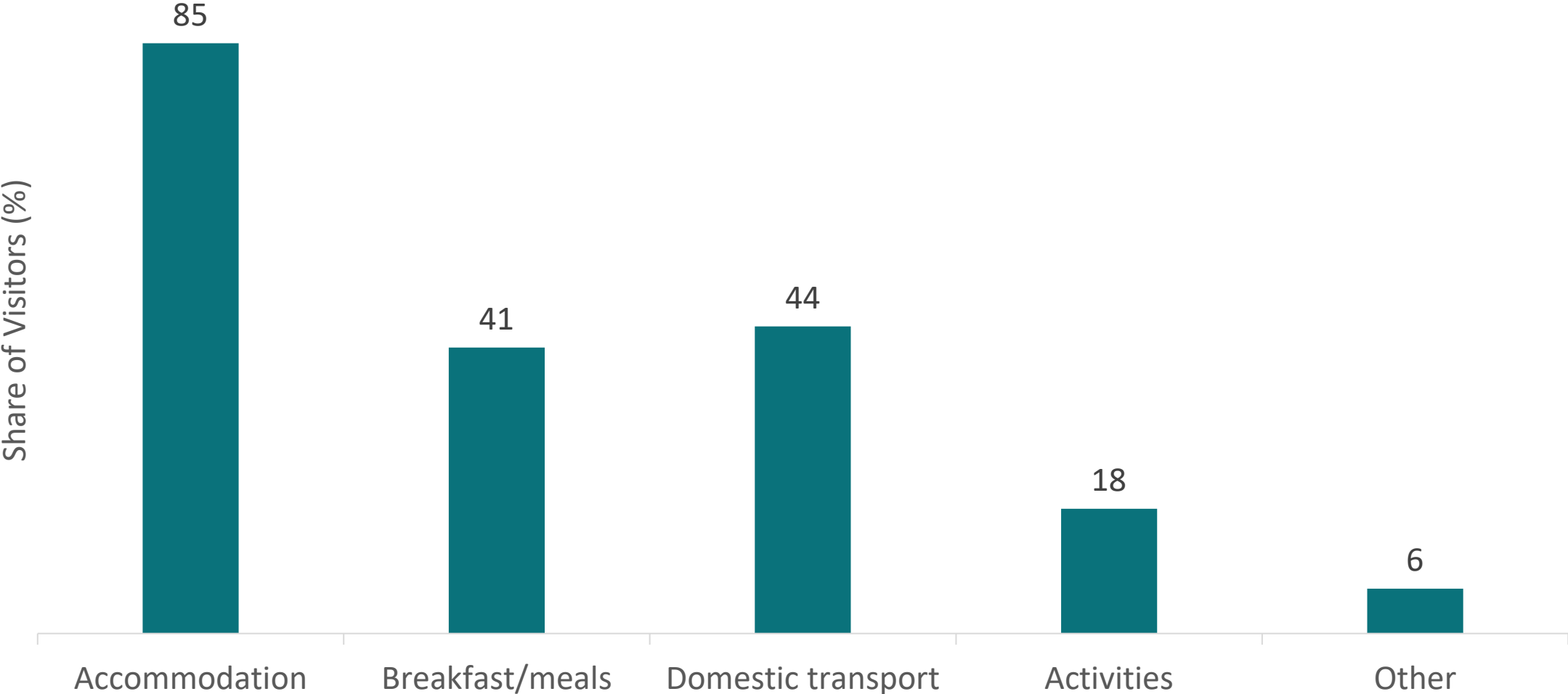
Visitor
Satisfaction

Prepaid expenditure



Note: In US dollars.

Prepaid expenditure includes



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

In-country spend per person per day while in Vanuatu

	JAN-JUN 2019		JAN-JUN 2023	
	<u>% of sector</u>	<u>USD</u>	<u>% of sector</u>	<u>USD</u>
Accommodation	24	23	41	39 ▲
Food and Beverage	30	28	26	25
Domestic Travel	8	8	7	7
Retail	11	10	8	7
Tour	9	8	5	5
Local Transfer	7	6	5	4
Entertainment / Internet / Service	5	4	4	4
Souvenirs	3	3	2	2
Duty Free	3	3	2	2
TOTAL	100%	\$93 10,595 VT	100%	\$95 10,913 VT

Note: Average exchange rate VUV-USD for Jan-Jun 2019 and Jan-Jun 2023 are applied respectively.

Economic impact – Per person and total

	JAN-JUN 2019		JAN-JUN 2023	
	USD	VUV	USD	VUV
Average Spend Prior to Arrival				
Per Person Per Trip	1,190	135,611	1,358	154,972
<i>Flowing into local economy rate – estimated</i>	62.5%		62.5%	
Per Person Per Trip	744	84,757	849	96,858
Per Person per Day	93	10,595	94	10,883
Average Local Spend				
<i>Length of Study (nights) - mean</i>	8 nights		9 nights	
Per Person Per Trip	745	86,010	855	98,216
Per Person per Day	93	10,595	95	10,913
Total Economic Impact-Per Trip	1,489	170,787	1,704	195,074
Total Economic Impact-Per Day	186	21,190	189	21,796

Note: Average exchange rate VUV-USD for Jan-Jun 2019 and Jan-Jun 2023 are applied respectively.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
and Impact

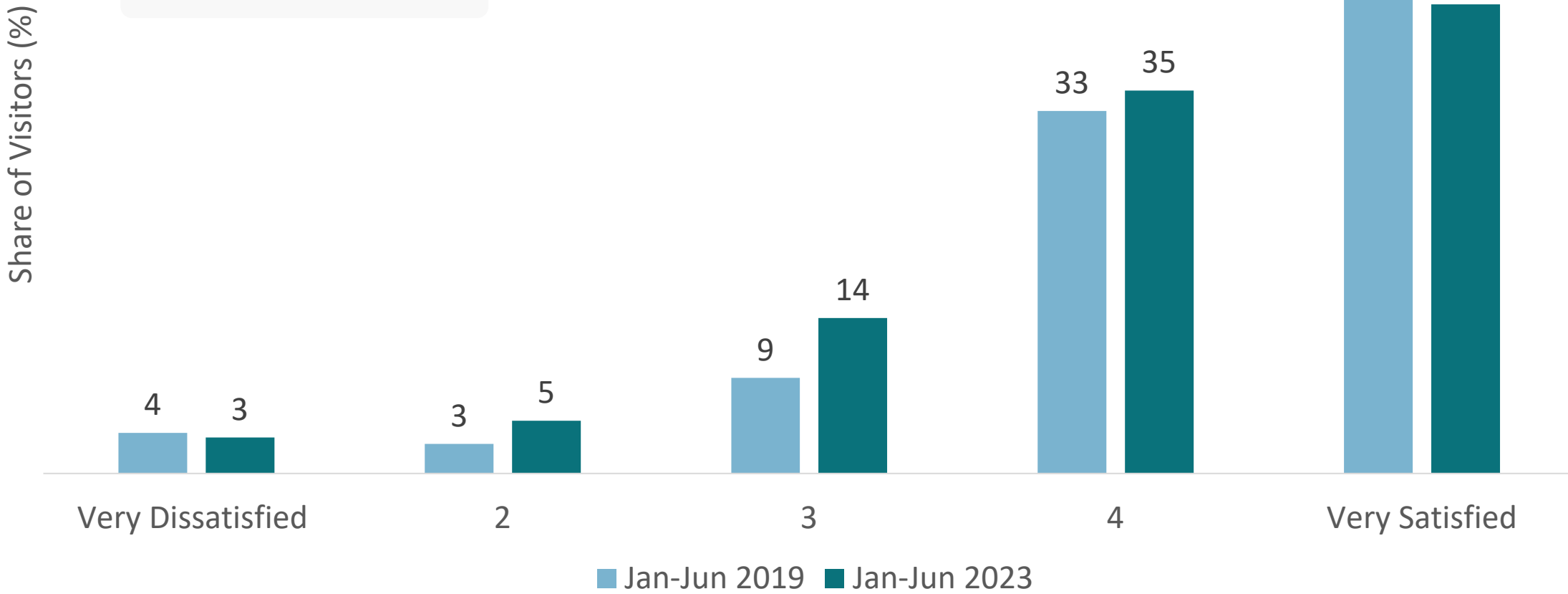


Visitor
Satisfaction

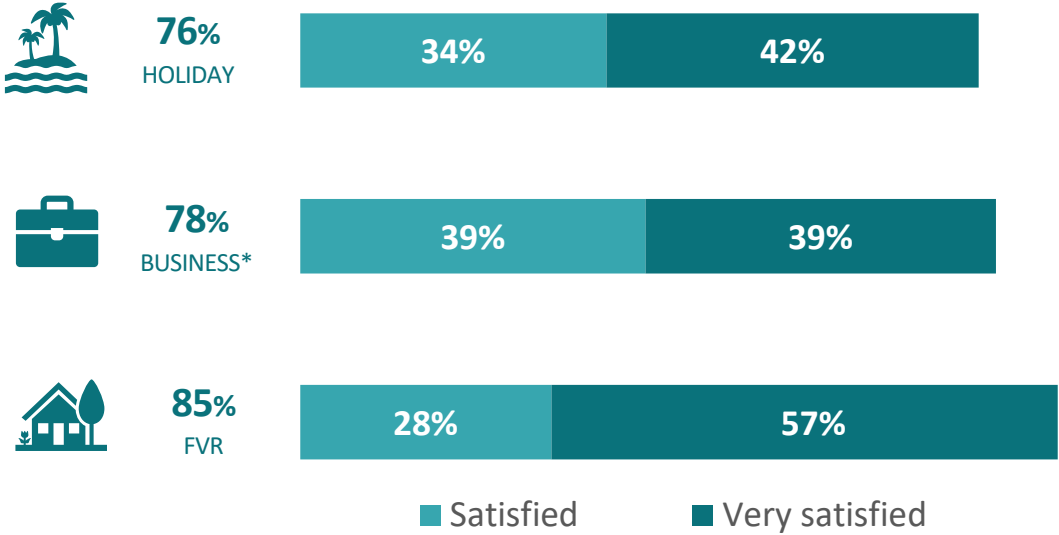
Visitor overall satisfaction

OVERALL SATISFACTION

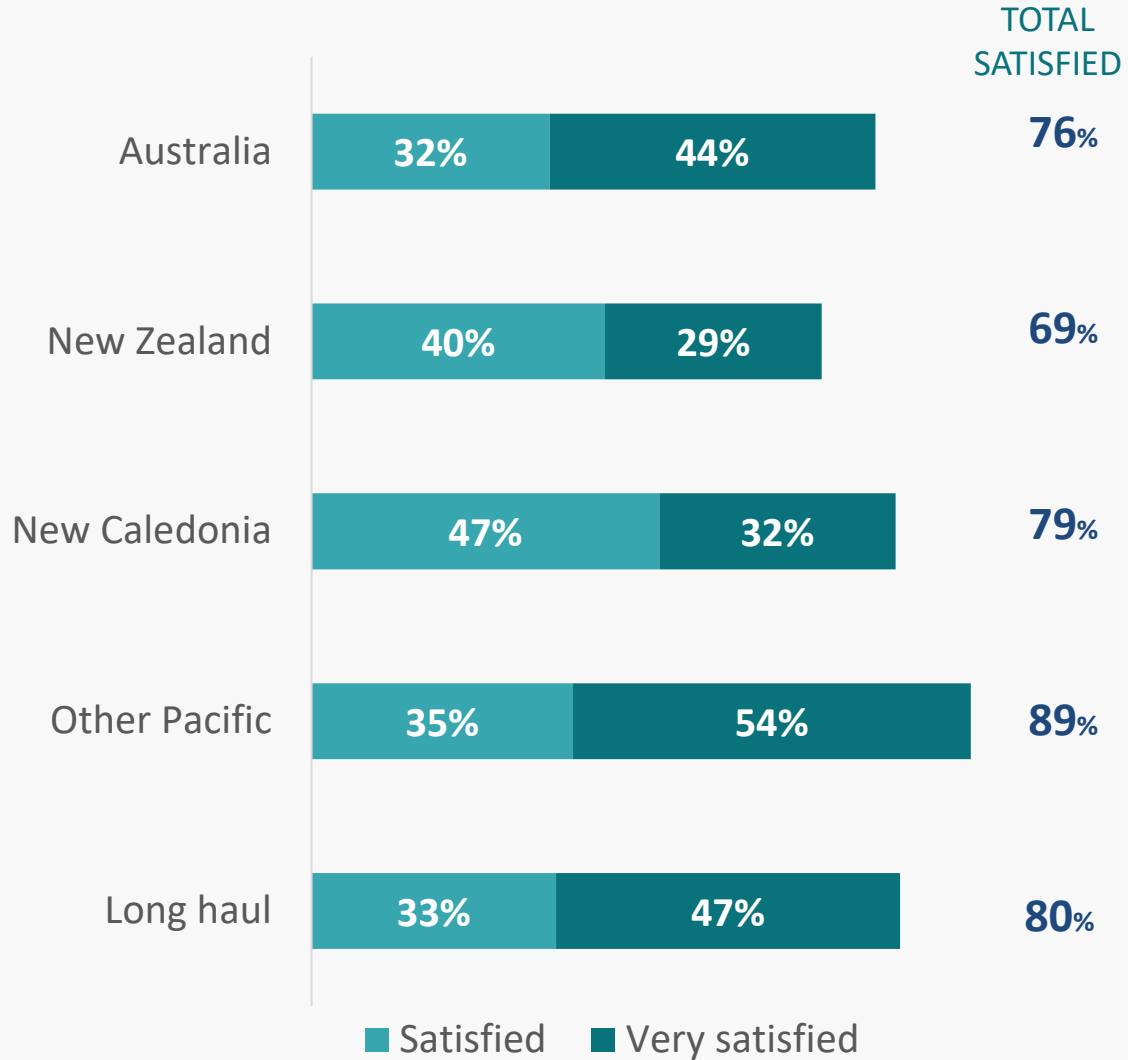
4.3 | **4.1**
JAN-JUN 19 | JAN-JUN 23



Overall satisfaction breakdown

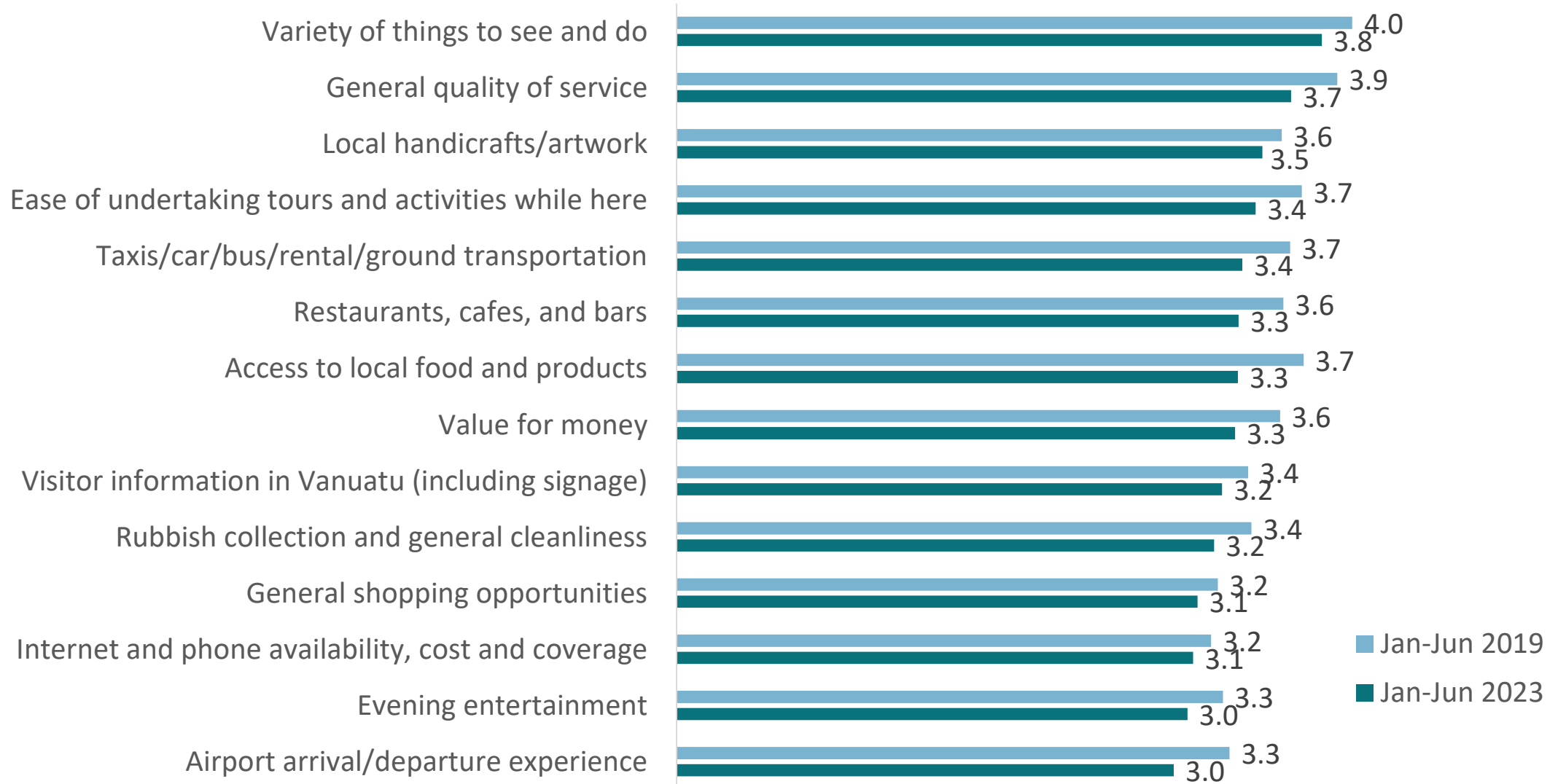


Market breakdown



Note: *Business visitors including respondents who visited for the purposes of business and conferences

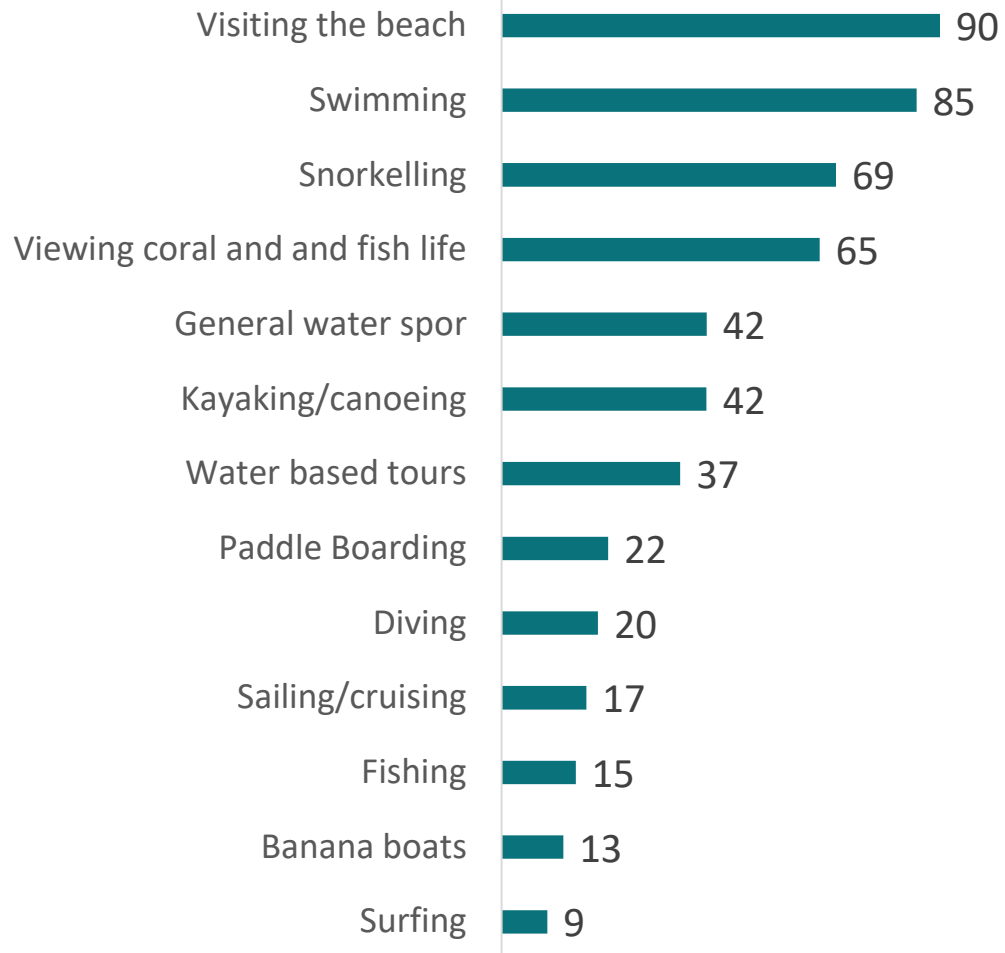
Satisfaction with travel experience



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

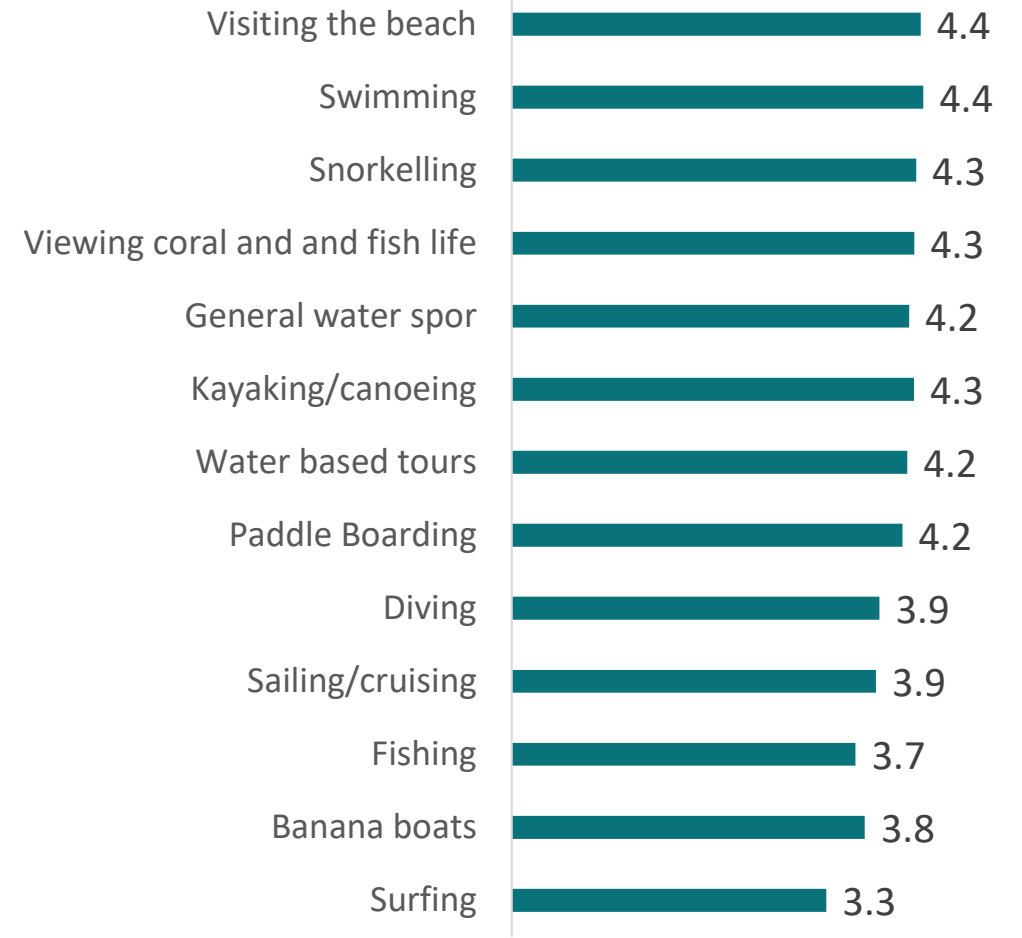
Water-based activities

Participation



Share of Visitors (%)

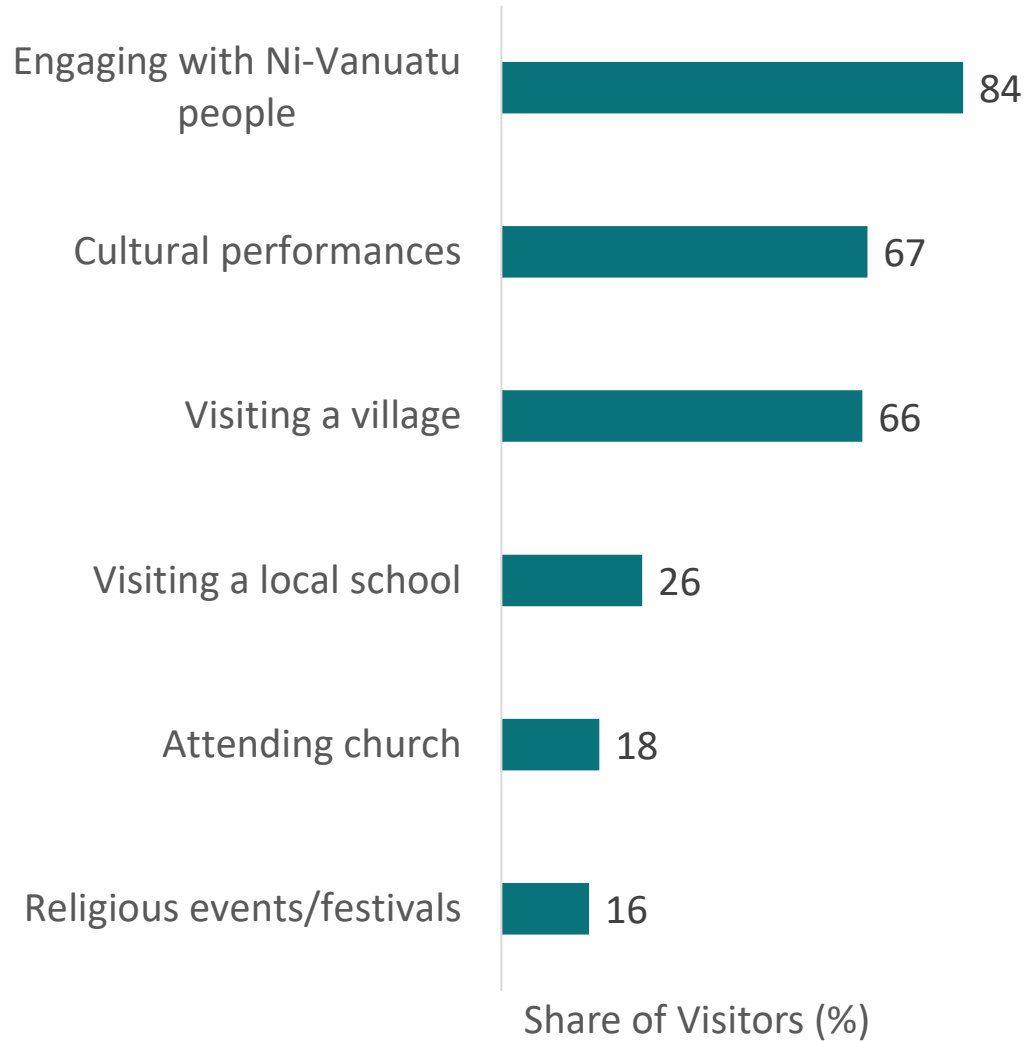
Satisfaction



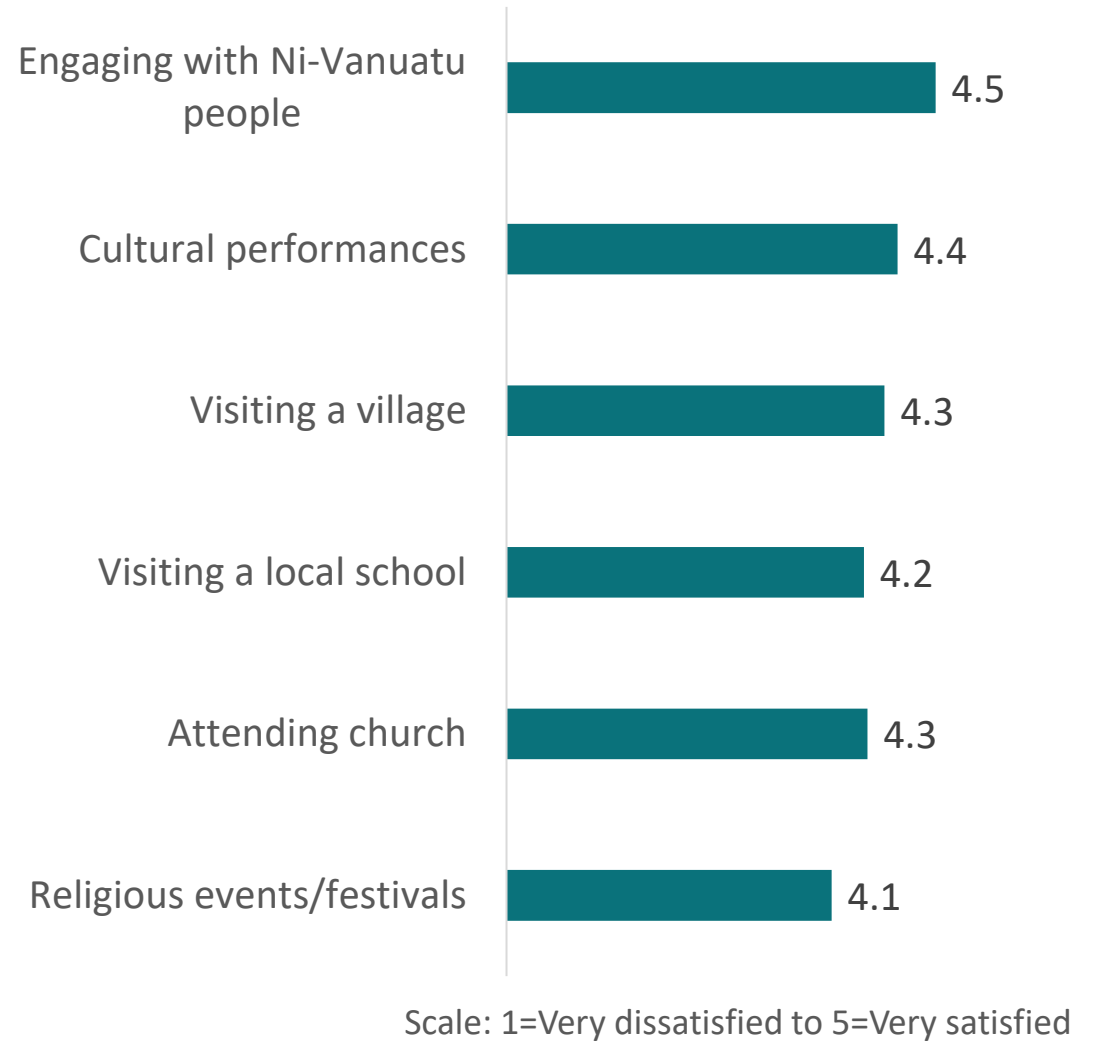
Scale: 1=Very dissatisfied to 5=Very satisfied

Cultural interaction

Participation

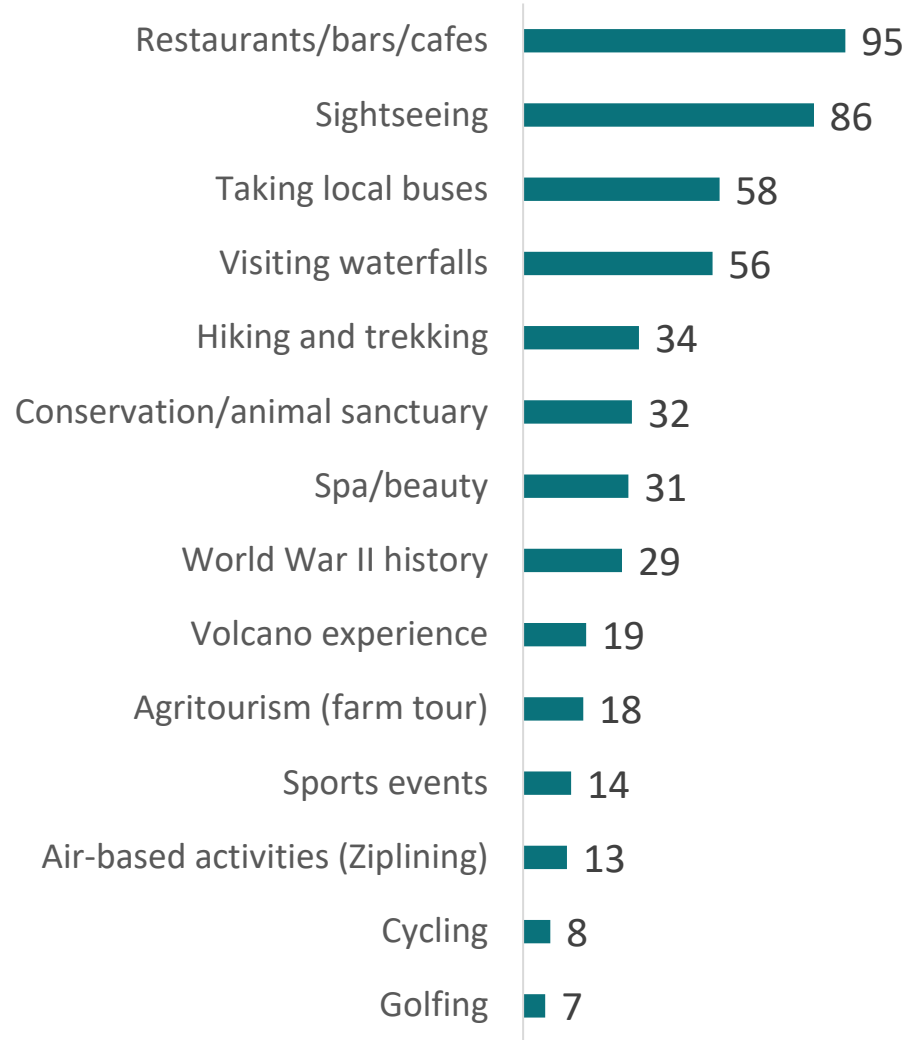


Satisfaction



Land-based activities

Participation



Share of Visitors (%)

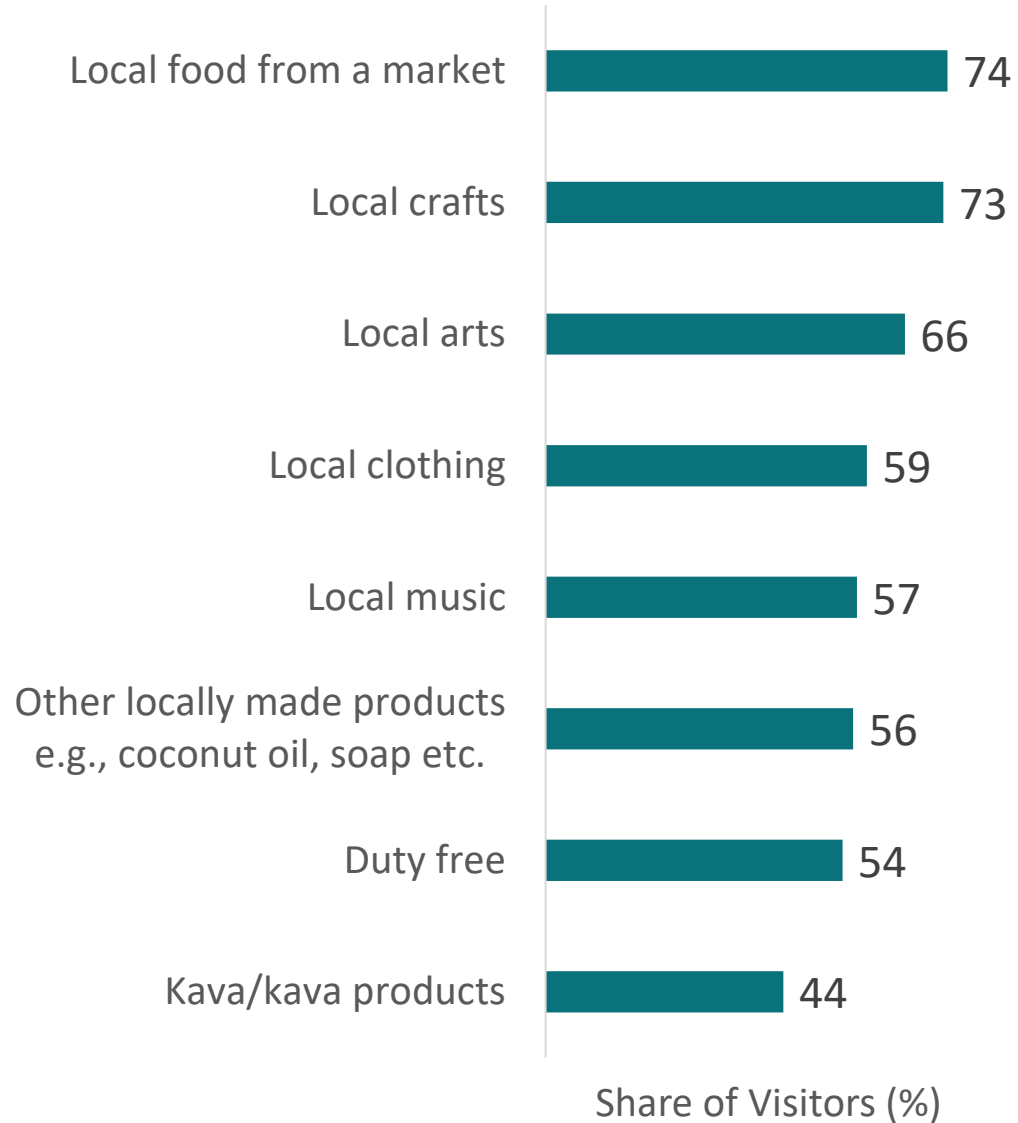
Satisfaction



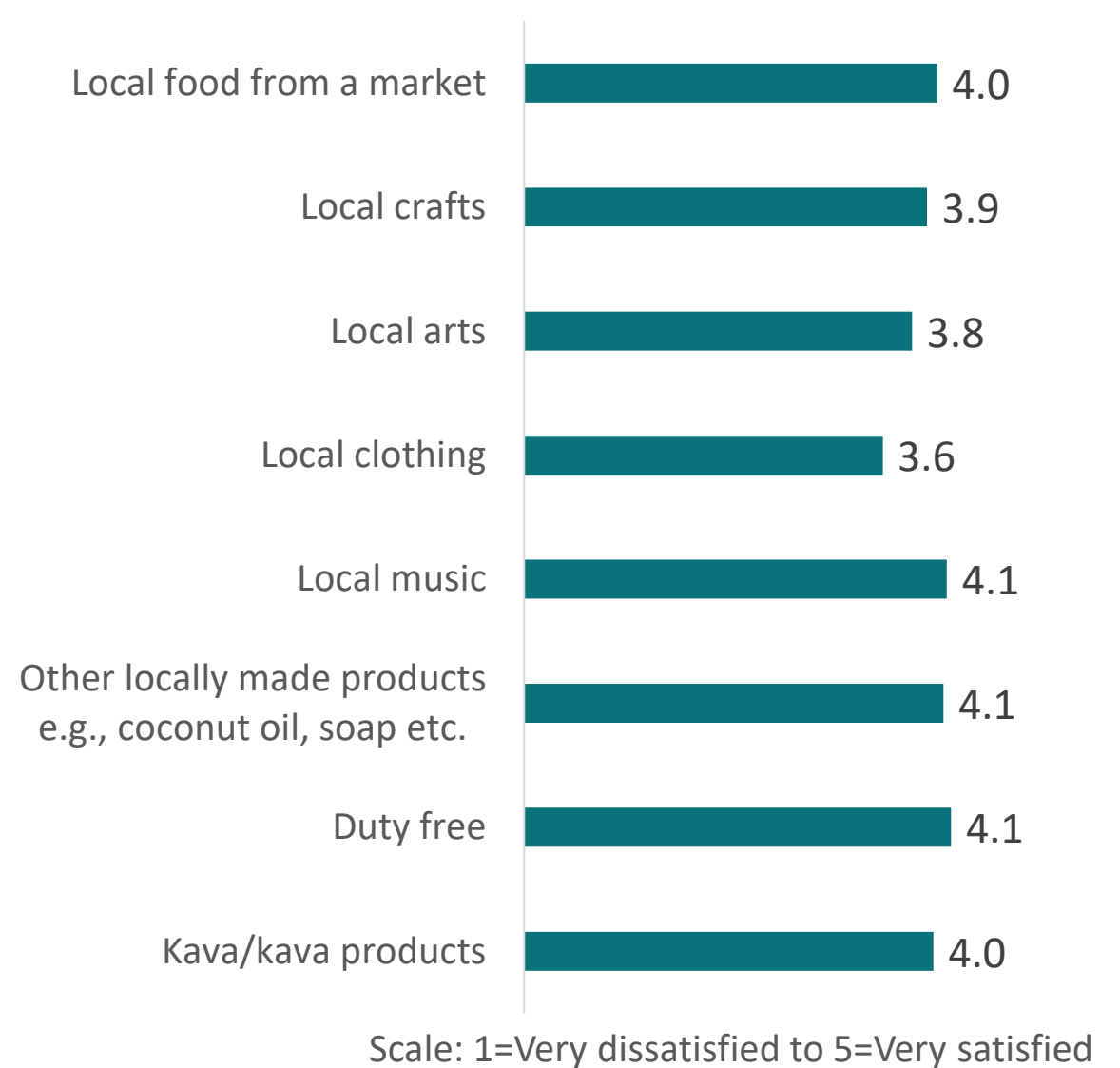
Scale: 1=Very dissatisfied to 5=Very satisfied

Shopping activities

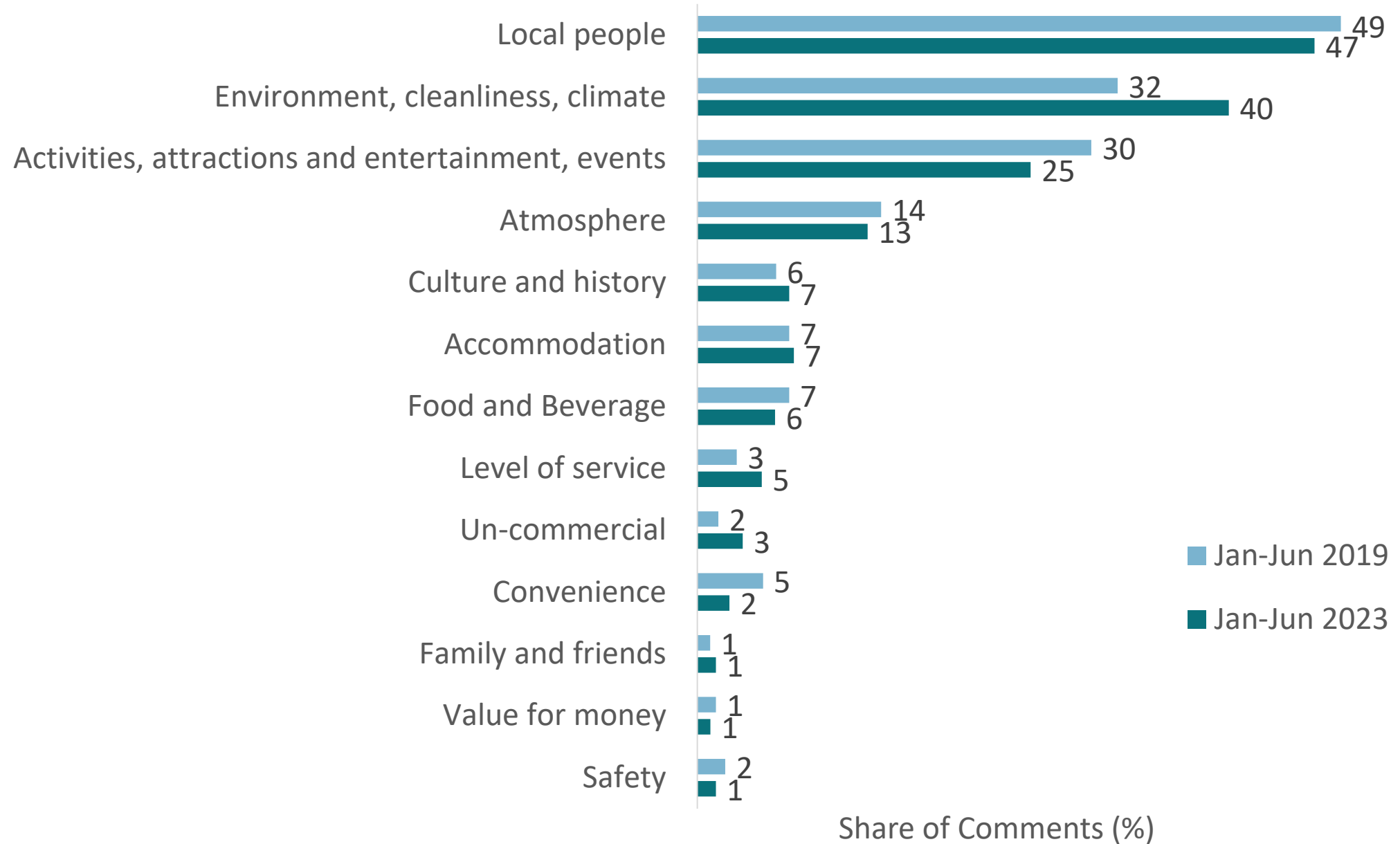
Participation



Satisfaction



Most appealing aspects



Note: Total response N=1,617. Multiple response analysis, so total does not add up to 100%

Most appealing aspects: Local people

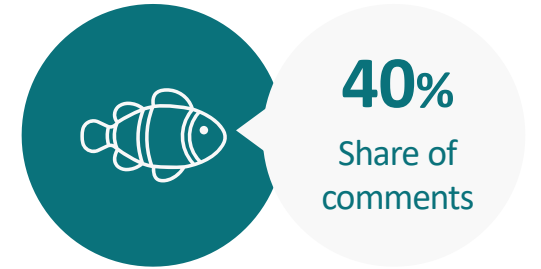


47%

Share of
comments

- + The friendly locals working at the resort.
- + Love the friendliness of the locals. Warm, sunny climate. Relaxed vibe.
- + Hospitality on Moso Island. Friendly, relaxed and low key. Quiet! Wonderful snorkelling and diving.
- + Beautiful place and people with good attitudes and respectful behaviours
- + The people were amazingly friendly and welcoming. Everyone went out of their way to ensure that my wife and I were happy.
- + The locals were extremely friendly and the hospitality was really nice. It was really nice that the islands were not crowded with tourists. Beautiful and unspoiled nature and people.
- + The local people were so relaxed and friendly. Several people asked if we were Australian, and if we were enjoying ourselves.
- + Friendly people who were engaging and eager to show off their country. Blue holes, horse ride, waterfalls – wish we were here longer to see more of the beautiful country.

Most appealing aspects: Environments, cleanliness, climate



- + The weather is beautiful, the beach is clean. coconut is really tasty.
- + The water, how clear it is, and the native wildlife under water.
- + Beautiful beaches and water. So clean and well respected/looked after. Huge huge appreciation for the opportunity to experience the waters on Santo.
- + Limited crowd and general cleanliness of Port Villa.
- + The untouched natural habitat and beautiful beaches. The people are extremely helpful, and I always felt safe.
- + The weather was wonderful. Catching local buses and getting around was fun. The snorkelling on Lelepo island was great. Hiring a car and travelling around the island was wonderful.
- + Untouched nature, amazing coral reef, welcoming people.
- + The kindness, happiness and generosity of the Ni-Vanuatu people. The natural beauty and landscape of Vanuatu is also second-to-none!
- + The beautiful nature, above and under water. I have rarely seen corals as healthy, and dive sites generally were amazing! Also Tanna is one of the most beautiful places I have ever visited, and I travel a lot. Besides that, people were incredibly friendly, warm and welcoming.

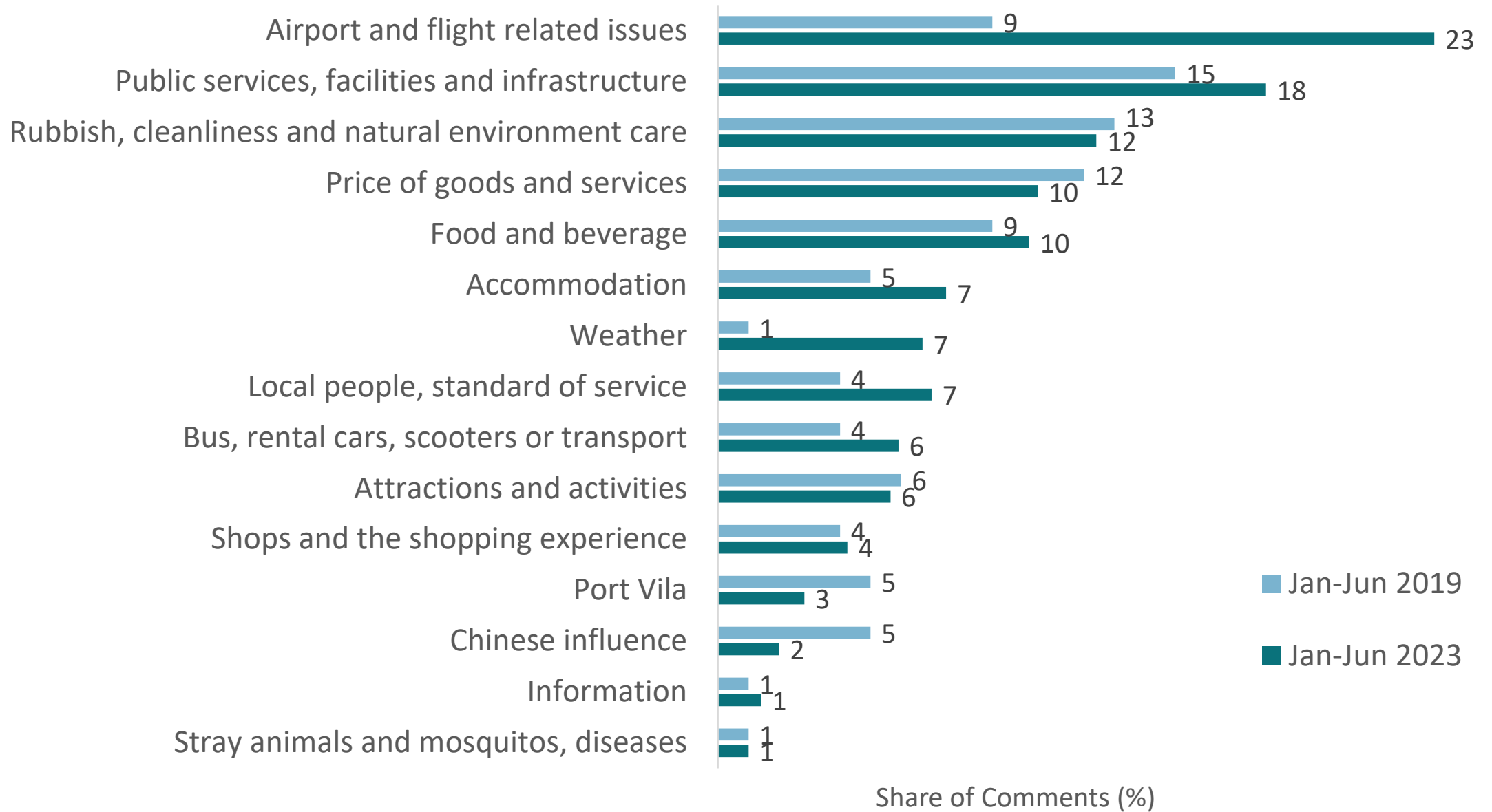
Most appealing aspects: Activities, attractions and entertainment



25%
Share of
comments

- + The culture and the volcano at Tanna Island.
- + The Volcano over night trip. Rockwater Resort and the people of Vanuatu in general.
- + The entertainment by Operatunity, our tour hosts.
- + The museum was informative and the show by the guide was well worthwhile.
- + All our activities were world class. The Blue lagoon was amazing, somewhere I would love to visit over and over again. Ziplining was well run, fun and very professional. Our buggy tour was heaps of fun and a highlight for our kids. The restaurants and cafes in town provided amazing food.
- + Snorkelling at Hideaway Island & Top Rock, Swimming at Blue Hole & Pango Beach, Driving round the whole island, Travelling in buses with locals & staying in Mele with not too many tourists. Enjoyed watching sunset & seeing locals get on the boats back to their islands .
- + Santo island was a highlight, with the millennium cave and blue holes spectacular. We were glad we stayed at Turtle Bay as this was also a very well-run resort, which helped facilitate all of our tours (including kayaking to a nearby blue hole). The waterfall near Port Vila was also quite special.
- + Felt like a local experience and not completely overrun by tourism. Loved that it was large enough to see different things each day (from city to more remote areas). People were amazing and we loved exploring the rivers and beaches.

Least appealing aspects



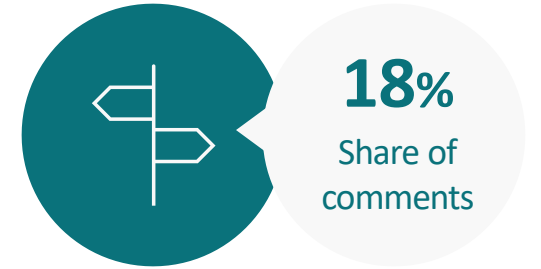
Note: Total response N=1526. Multiple response analysis, so total does not add up to 100%

Least appealing aspects: Flights-related issues



- + The Air Vanuatu customer service is a mess, still have not received refund 6 months.
- + Delays with flight coming in and significant worry about the risks of cancellations for flights leaving. Would be seriously uncertain about returning via Air Vanuatu given lack of reliability of flights. Would either fly with another airline or go elsewhere e.g. Fiji
- + Air Vanuatu letting us down with flights and the customer service line people where very rude and unhelpful.
- + Difficulty in receiving our luggage from Fiji due to plane size. Some bags never arrived and we had to pick up on our return trip to Fiji.
- + The Terrible air service spent two very hot days in the Luganville airport with cancelled delayed flights. No air conditioning and little communication made us reluctant to come back.
- + Air Vanuatu almost totally spoiled our whole trip - with cancelled flights and when we did fly poor in-flight service. The airport is also quite primitive.
- + Definitely the airport and flight experience... Air Vanuatu having limited planes definitely deters us from coming back any time soon. The Airport needs finishing as well, it was extremely hot waiting and there was no air con in the main waiting area. No airport lounges for the main airline groups either. Fix the airport experience goes a long way, as that is the first and last impression.

Least appealing aspects: Public services, facilities and infrastructure



- + Airport toilets, customs area, food venues at airport
- + Road conditions were pretty awful.
- + Lack of services - Air Vanuatu is now a joke and will be damaging the country reputation, potholes roads were terrible and possibility the slowest internet known to mankind!
- + The condition of meat storage in supermarkets, the lack of pharmacies and medicine available in Santo, the lack of doctors or medical research programs that would help Vanuatu to evolve its visibility.
- + Internet connection made keeping up with my work commitments very tough.
- + More traffic, long wait in peak hour traffic times.
- + The toilets everywhere we went commencing with the airport. The local airport terminal for flights to and from Santo. EVERYTHING is dirty.
- + The heat when trying to visit shops, lack of working ATM to get cash out in main street of Port Vila, the crazy potholed road on the way to our resort, the lack of air con in the airport and the 60min queue at the airport to enter the country (processing was ridiculously slow).
- + The impact of recent cyclone - it was devastating for locals however impressed by the resiliency of the country, local pride, services supporting recovery and rebuild. The water and sanitation required support as increased risks of vomiting diarrhoea bugs was not well known.

Least appealing aspects: Rubbish, cleanliness and natural environment care



12%

Share of
comments

- + Rubbish everywhere. Not that clean. No bins around. Dead corals and polluted in the lagoons.
- + Amount of rubbish on beaches and roads. Smoke from burning the rubbish and lack of infrastructure to deal with it. Seeing places that were pristine being slowly destroyed.
- + There was recently a cyclone so they were still rebuilding and there was quite a bit of debris and rubbish around
- + Airport delays and lost baggage were significant disruptors. The burning of rubbish overnight in Santo over the weekend caused issues with my asthma.
- + It was good to see street cleaners working prior to President Macron's visit. This should be an ongoing daily project. Having visited many times its always disappointing to see the general dirtiness of the streets.
- + The polluted water ways, streets etc. Rubbish is everywhere with locals giving very little care when discarding. Witnessed multiple occasions where rubbish was just thrown into the ocean. The one main reason for a visits is becoming a tip.
- + The general cleanliness wasn't great. I understand however that Vanuatu is still recovering from the cyclones earlier this year so it was expected. The first thing to do to help Vanuatu appeal more in my opinion should be to clean the streets. Plant new flowers and trees and make the neighbourhoods tidy. I visited Samoa not long after I left Vanuatu and was in awe at how pristine their gardens and streets were. It made a big difference.

Suggestions for improvement



Note: Total response N=943. Multiple response analysis, so total does not add up to 100%. Public service and infrastructure include airport-related suggestions.

Suggestions for improvement : Flight-related issues



- + More direct flights from Melbourne to Port Vila.
- + Direct access/flights from Sydney to Luganville
- + Air Vanuatu better planes, not cancelling flights last minute. better communication with customers.
- + Booked airport transfers did not show up. Our flight home was cancelled. Some of the meals were of poor quality.
- + Suggest travellers do not try and get flight connection the same day as flight delays were common. Also have travel insurance.
- + Having the airline - Air Vanuatu provide timely communication and the ability to reschedule flights quickly. We have been to Vanuatu 4 times this year and out of the 3 trips we have had significant plane delays or cancellations.
- + Improve the maintenance on Air Vanuatu planes. Insist that Air Vanuatu be upfront and honest with their customers so we know what is going on, and can plan accordingly. Insist that Qantas, if they are going to codeshare with Air Vanuatu, provide replacement flights if air Vanuatu can't do it. The flight experience, the extra costs to travel with Virgin, and the aftermath on taking months to get our money refunded for flights that didn't happen and had been paid months in advance has left a sour taste on our whole Vanuatu experience.

Suggestions for improvement: Public services and infrastructure



- + More public access to beaches around port vila
- + Wheelchair accessibility.
- + Toilets at airport terribly dirty. No soap. Struggled to find sunscreen in supermarkets
- + I wish the road department would fix the potholes in the road when they are small rather than letting the roads destroy all the vehicles before they do something.
- + Better roads. More signage and similar would have helped with navigation.
- + Sometimes hard to work out how to get a bus when not in a busy location. Improved roads.
- + Telephone and internet service was pretty poor, but maybe that's to be expected, I don't know...
- + Make it clearer how/where to send post cards! Besides Hideaway Island, I couldn't figure out where to buy stamps other than the post office which was a bit of a walk to get to. But that is my only complaint!
- + When you arrange airport transfers and the driver doesn't bother to show up, it's annoying...
- + ...We unfortunately needed medical attention at the Port Villa public hospital. It was a very unpleasant experience and staff seemed unqualified to handle the situation...
- + It was a super fun trip. Would be great to have non-tour-based activities too. Some signposted hiking paths, or safe snorkelling areas. Fully understand that this is probably in development so consider it as suggestions for improvement rather than complaints...

Suggestion for improvement: Activities & Transport



- + Move things being open, more things to do.
- + ...more options to visit without tour operators
- + I don't think there was enough to do on Efate for a 7-night visit. In hindsight I should have done a two-centre trip.
- + We were not told that golfing was no longer available at the hotel
- + Had we had information regarding resorts prior to arrival to prepare and bring necessary equipment - eg bring snorkelling gear, bring masks for volcano
- + Open golf courses. Get rid of the excess rubbish around.
- + Probably have more shops that could open till late.
- + Entry to natural attractions very expensive
- + More reliable inter-island transport.
- + More exposure to local people in their villages. More professional tours. We paid a lot for a full day tour and not only did we not get what was promised but what we did get was very poor.
- + Transport at the airport was very confusing. Someone took our bag from the bus trailer by mistake and it took 8 hours for it to be dropped of even though it was located nearby.

Suggestion for improvement: Food availability, quality and price



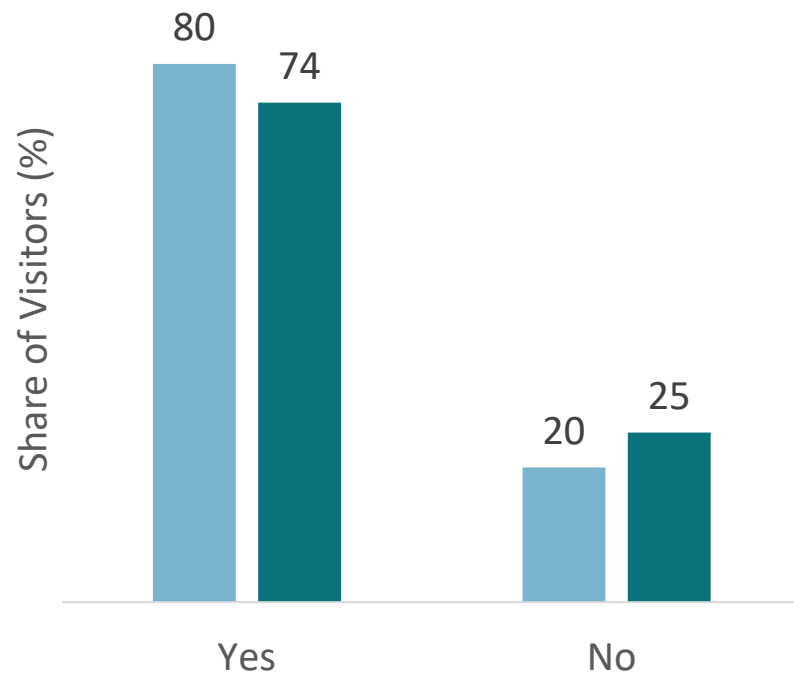
14%

Share of
comments

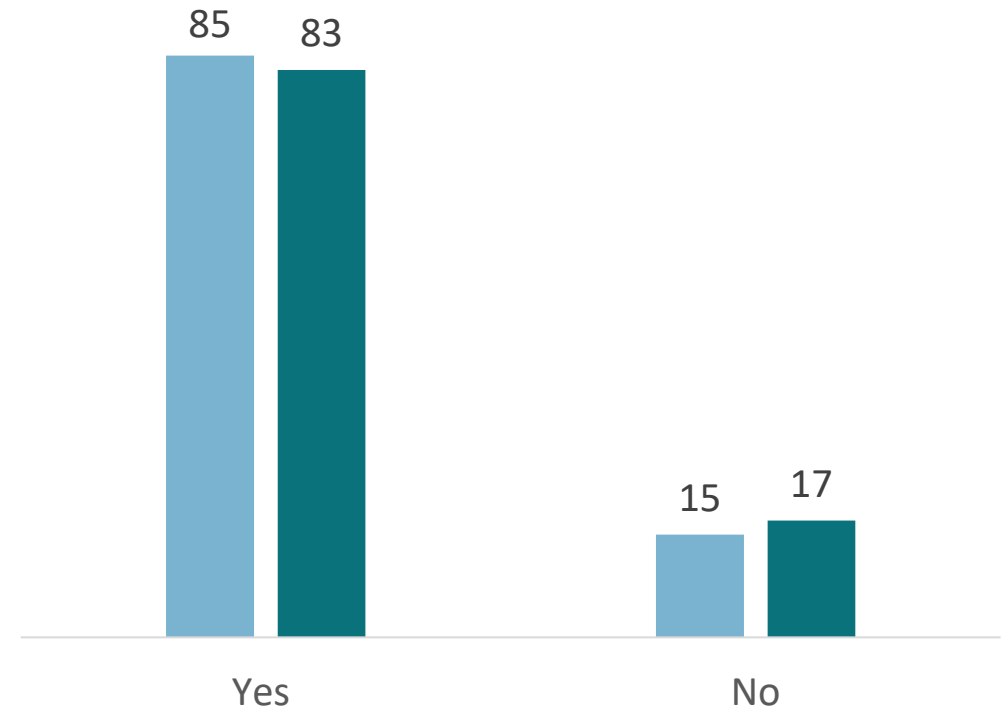
- + More local foods, there was too much foreign influence.
- + Value for money for food and charging money for doing pretty much anything, like going to a beach.
- + Food Varieties should be added like Halal food specifically.
- + More cultural opportunities and evening meal options.
- + Better facilities at the hotels in Santo. Restaurant choices on a Sunday night.
- + More affordable lodging and eating options.
- + More variety of restaurants and more affordable options.
- + Better customer service and care (Digicel, restaurant waiters etc)
- + ...Was hoping to see a more vibrant food / fruit market but the market in PV was a major disappointment. Food at resort was repetitive, expensive and portions were small...
- + Coming after 2 devastating cyclones meant there wasn't a good variety of fresh food, especially fruit and vegetables...Everything was very basic but we were paying as much as we would in NZ.
- + Maybe the availability of vegetarian food, although I understand that I cannot expect another country to cater to my personal diet when travelling.

Future intentions

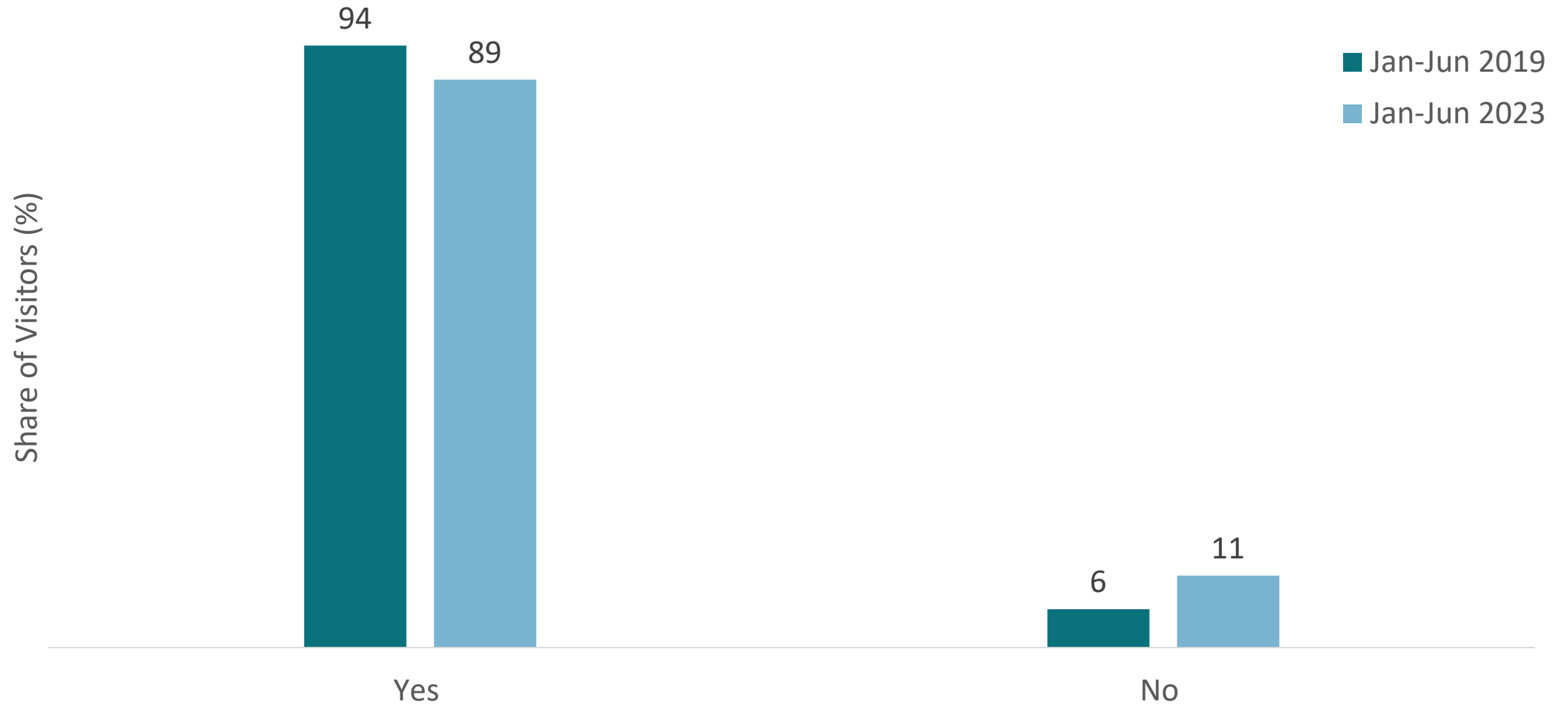
Willingness to return to Vanuatu



Willingness to visit outer islands



Willingness to recommend





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Thank you

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