

VANUATU INTERNATIONAL VISITOR SURVEY

IVS INSIGHTS AND COVID RESPONSES

July – December 2022 Visitors



AUT



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
MANATU AORERE

Key Notes

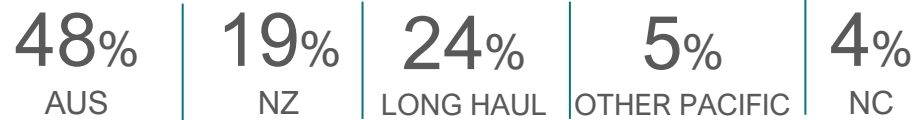
- IVS data from July to December 2022 was analysed to help us understand the visitor experience and gain insights into tourism recovery after the border reopening.
- Key comparison analyses were carried out between the 2019 annual data and July-December 2022 data.
- All analyses were conducted based on the IVS responses data, which is unweighted due to missing arrival data from September to December.
- The dataset consists of four months of data (July, August, September and December 2022). October and November data are missing due to the government server shutdown in Vanuatu in late 2022.
- All reports from the IVS are available at [Pacific Tourism Data Initiative Resource Page](#)

SUMMARY OF KEY FINDINGS 2019 vs. 2022

Annual 2019



COUNTRY OF ORIGIN



8%

Visitors are 70 years old or over.



3 ppl

Avg. number of travel companions.



54%

Visitors visited for the first time.



\$76,758

Average household income.

Note: US dollars.

Jul-Dec 2022



COUNTRY OF ORIGIN



11%▲

Visitors are 70 years old or over.



2 ppl▼

Avg. number of travel companions.



49%▼

Visitors visited for the first time.



\$96,754▲

Average household income.

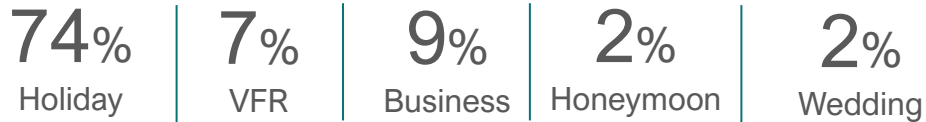
*N.B. Results for 2022 IVS are unweighted

SUMMARY OF KEY FINDINGS 2019 vs. 2022

Annual 2019



PURPOSE OF VISIT



4.3/5

Overall, visitors are very satisfied.



94%

Visitors are willing to recommend.



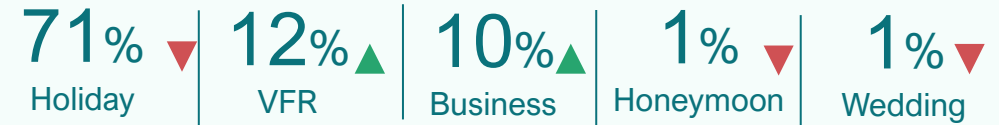
81%

Visitors are willing to return.

Jul-Dec 2022



PURPOSE OF VISIT



4.2/5 ▼

Overall, visitors are very satisfied.



91% ▼

Visitors are willing to recommend.



80% ▼

Visitors are willing to return.

*N.B. Results for 2022 IVS are unweighted

SUMMARY OF KEY FINDINGS 2019 vs. 2022

Annual 2019

 PREPAID EXPENDITURE

\$1,174

Prepaid per trip

62.5%

Flowing into local economy rate

\$735

Prepaid per trip

 IN-COUNTRY SPEND

\$86

In-country spend per day



x **7.9** nights
Average length of stay

\$681

In-country spend per trip

 ECONOMIC IMPACT

\$1,416 per trip

\$179 per day

Jul-Dec 2022

 PREPAID EXPENDITURE

\$1,396

Prepaid per trip

62.5%

Flowing into local economy rate

\$873

Prepaid per trip

 IN-COUNTRY SPEND

\$105

In-country spend per day



x **9.4** nights
Average length of stay

\$987

In-country spend per trip

 ECONOMIC IMPACT

\$1,860 per trip ▲

\$198 per day ▲

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

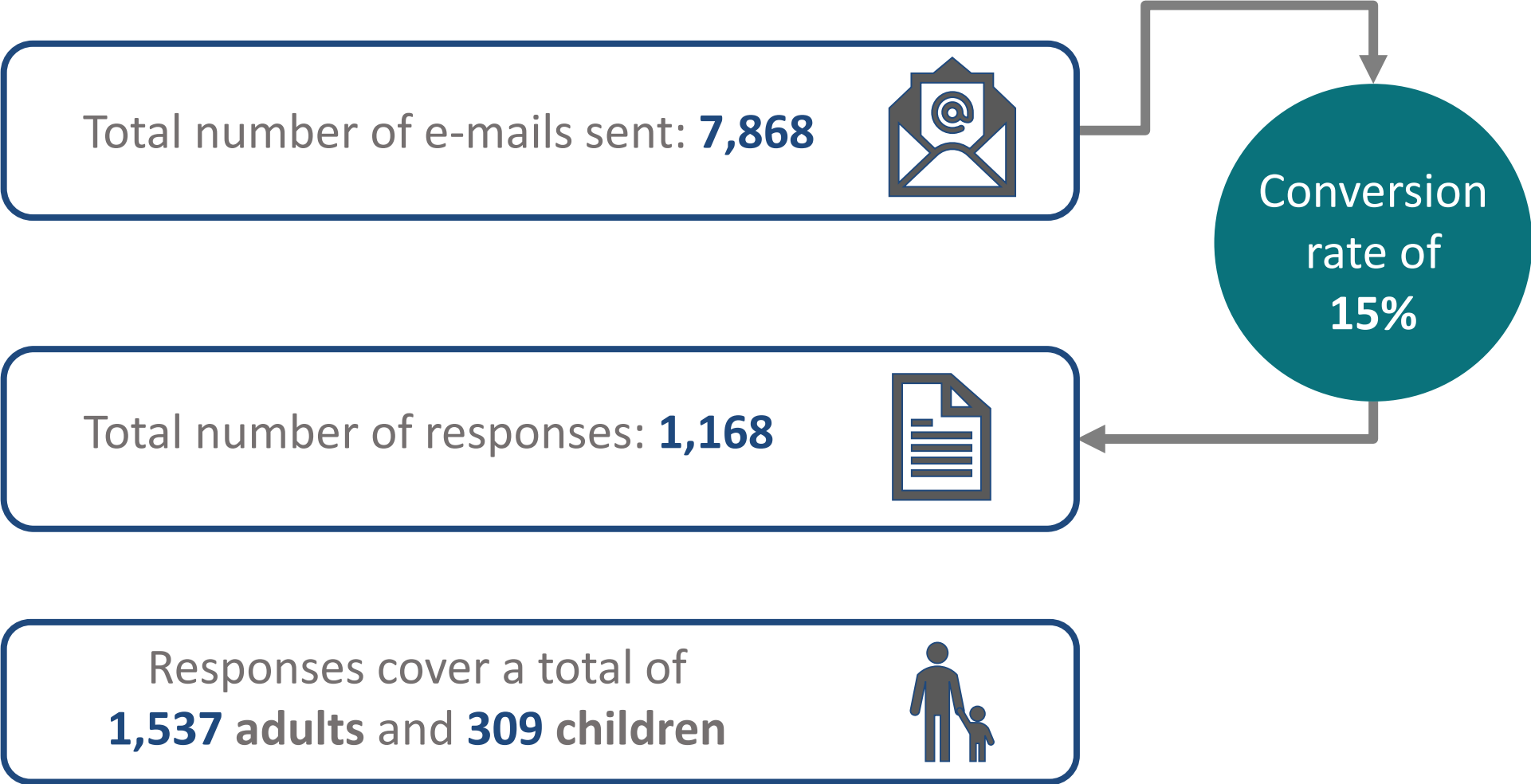


Visitor Spending
and Impact



Visitor
Satisfaction

Respondents (Jul-Sep 2022)



Total number of e-mails sent: **7,868**



Total number of responses: **1,168**



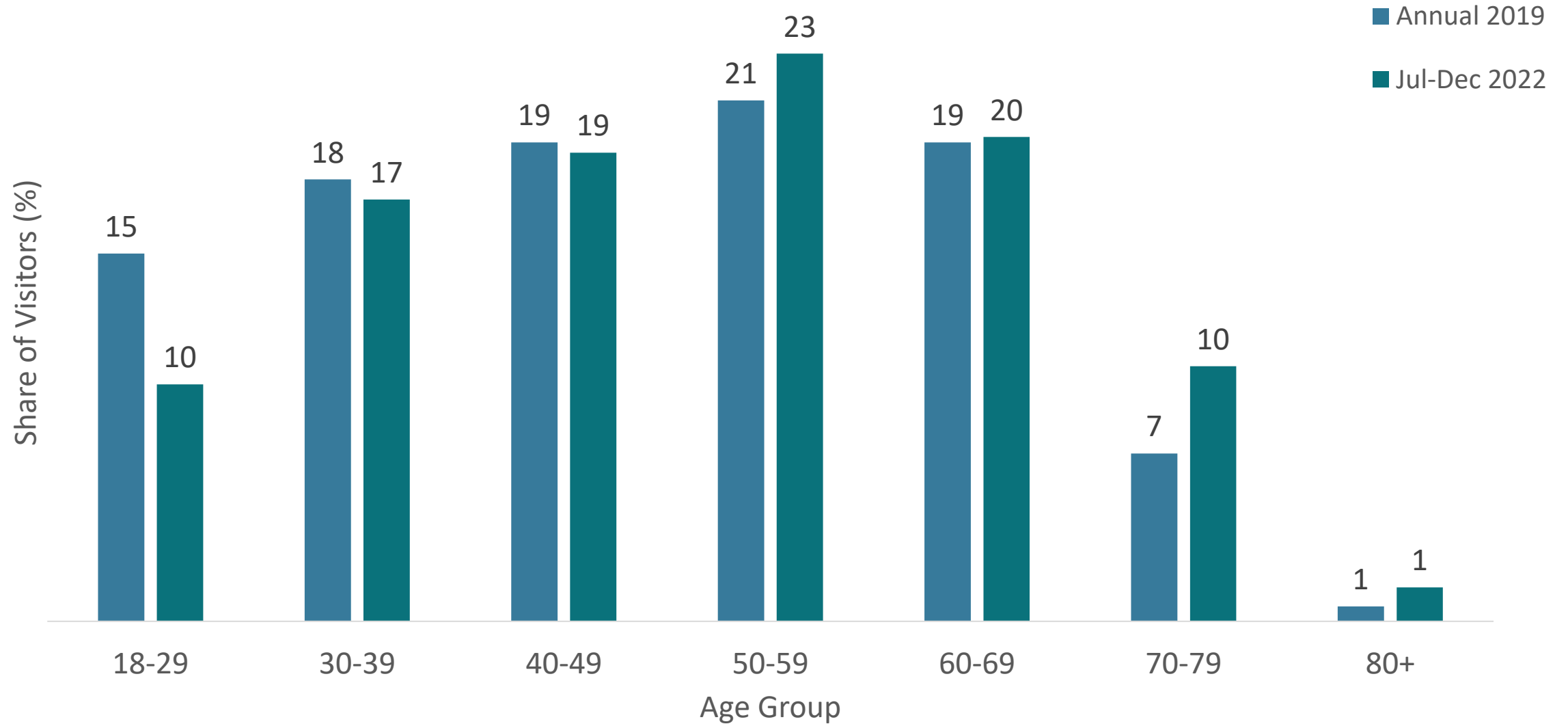
Responses cover a total of **1,537** adults and **309** children



Conversion rate of **15%**

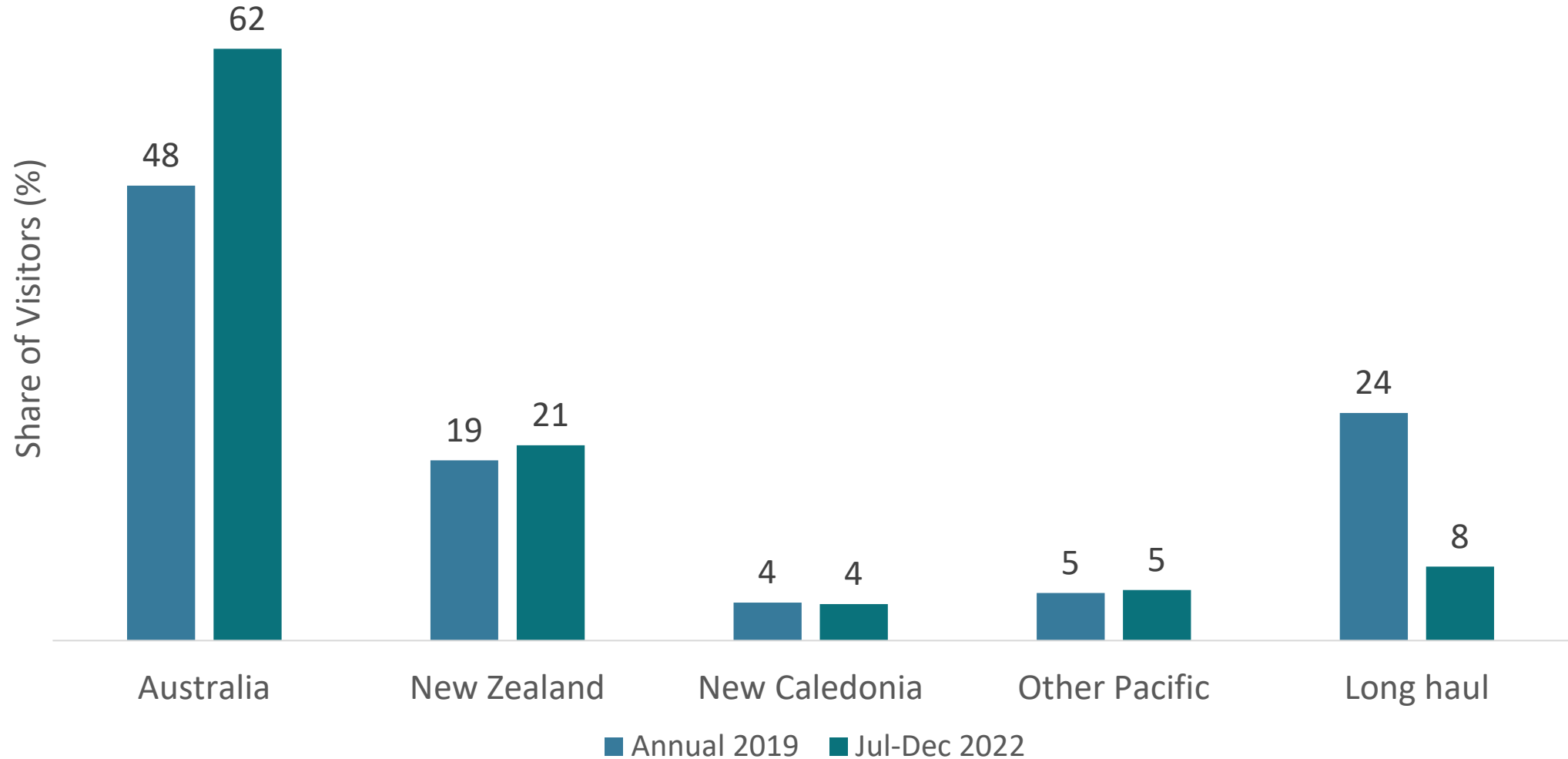
Note: The Response Covering Rate (responses/visitors during the period) is not calculated due to missing September arrival data.

Age



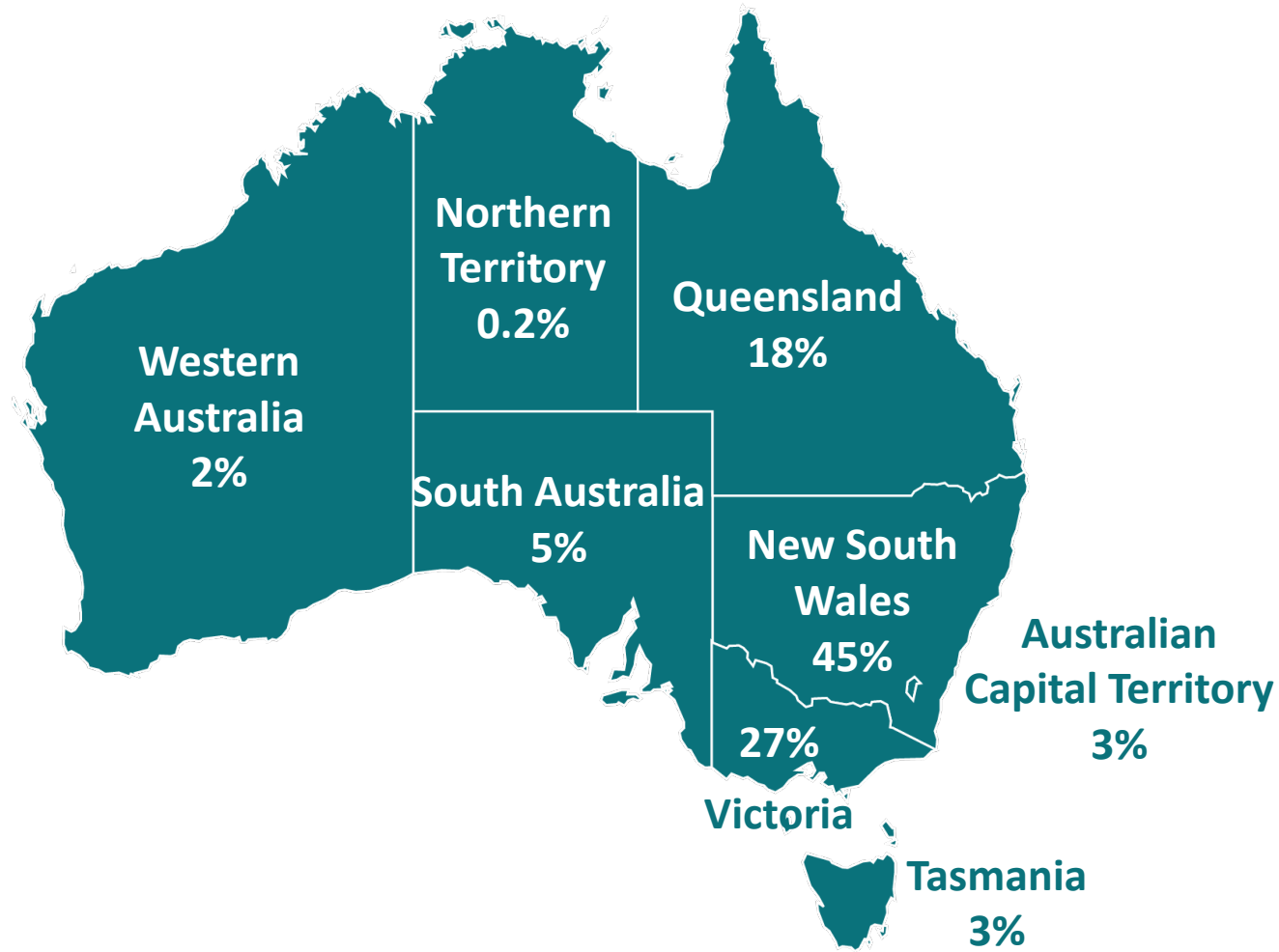
Note: due to rounding, total does not sum to 100%

Country of Origin



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

Australian Respondents - IVS Respondent Data Jul-Dec 2022

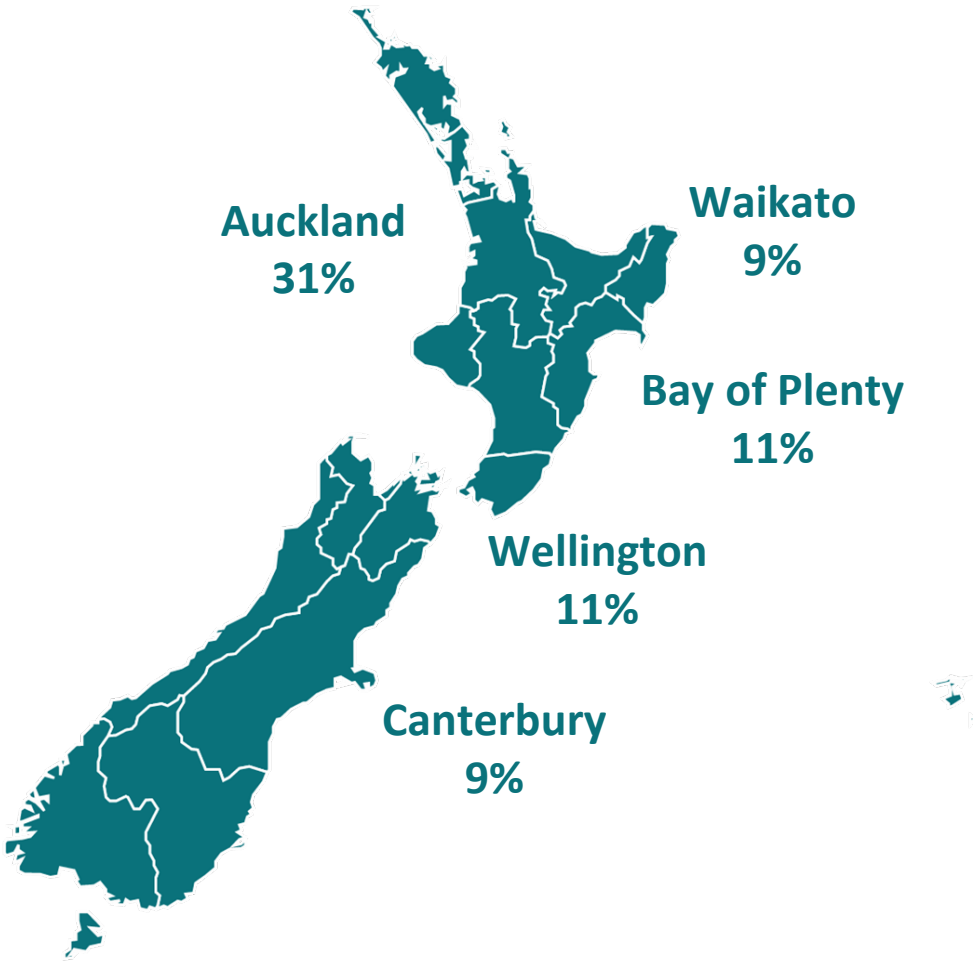


TOTAL
574
AU VISITORS

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 Jul-Dec 2022



TOTAL
188
NZ VISITORS

Auckland, Waikato, Wellington, Canterbury, and Bay of Plenty make up **71%** of all New Zealand visitor arrivals

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

Annual Household Income

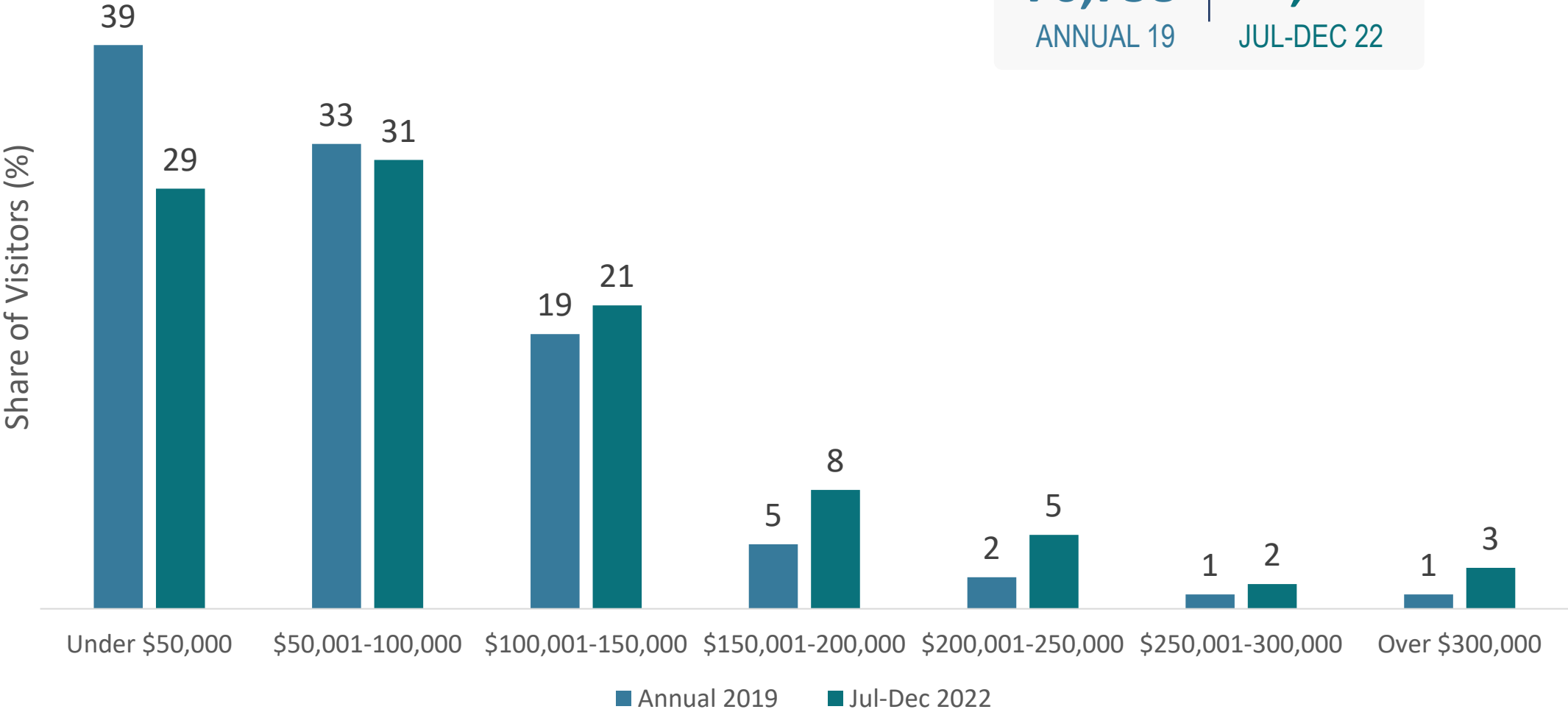
AVG. HOUSEHOLD INCOME

76,758

ANNUAL 19

96,754

JUL-DEC 22



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

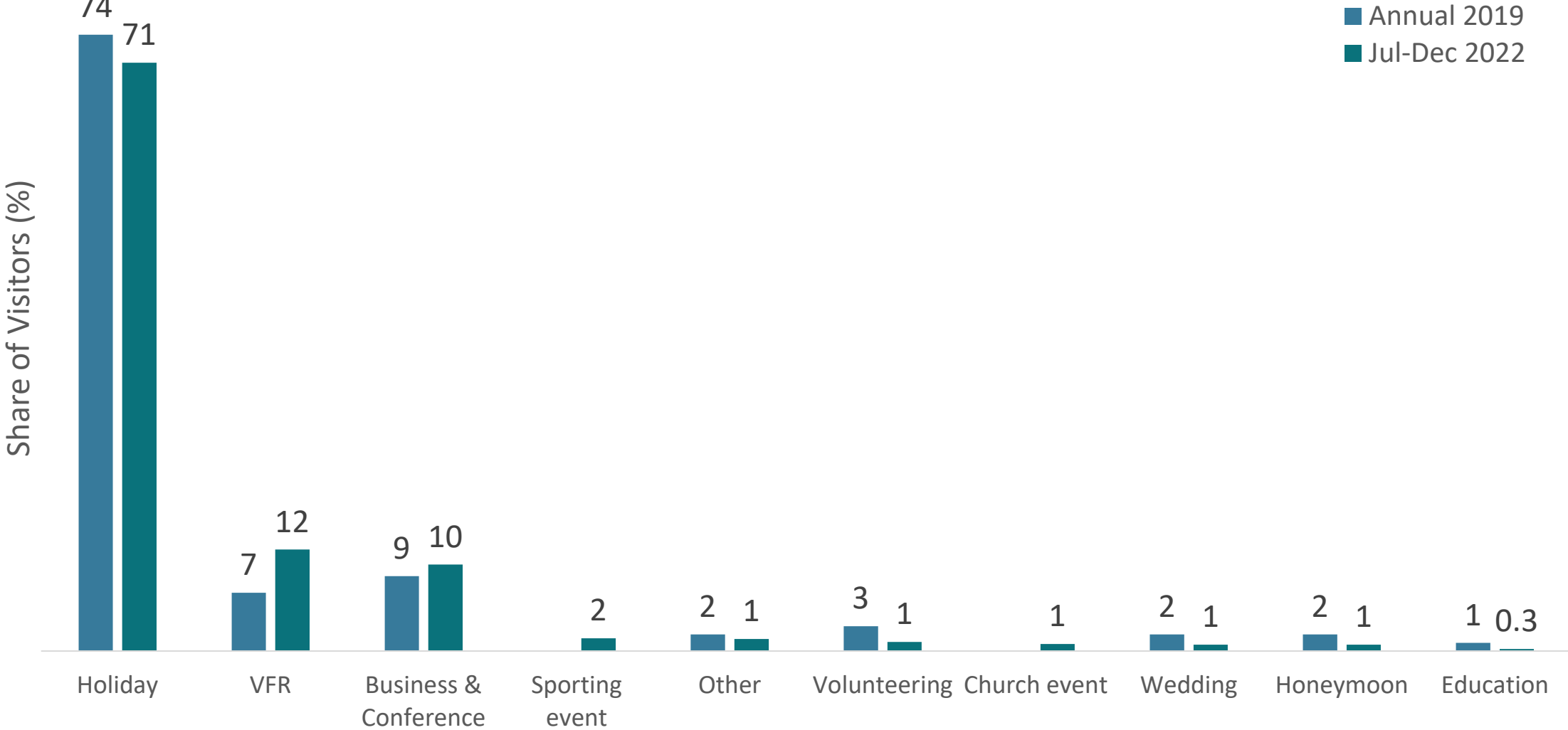


Visitor Spending
and Impact



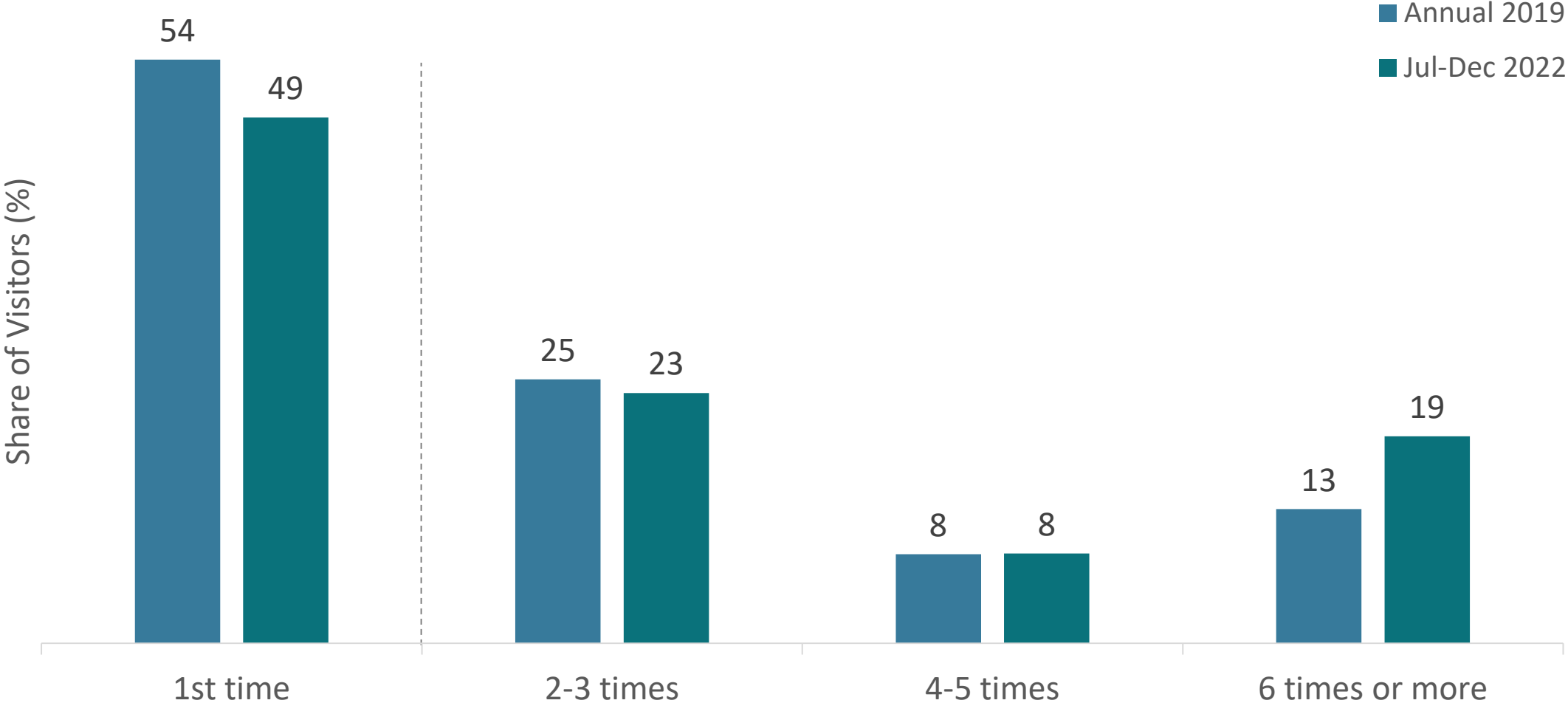
Visitor
Satisfaction

Purpose of Visit



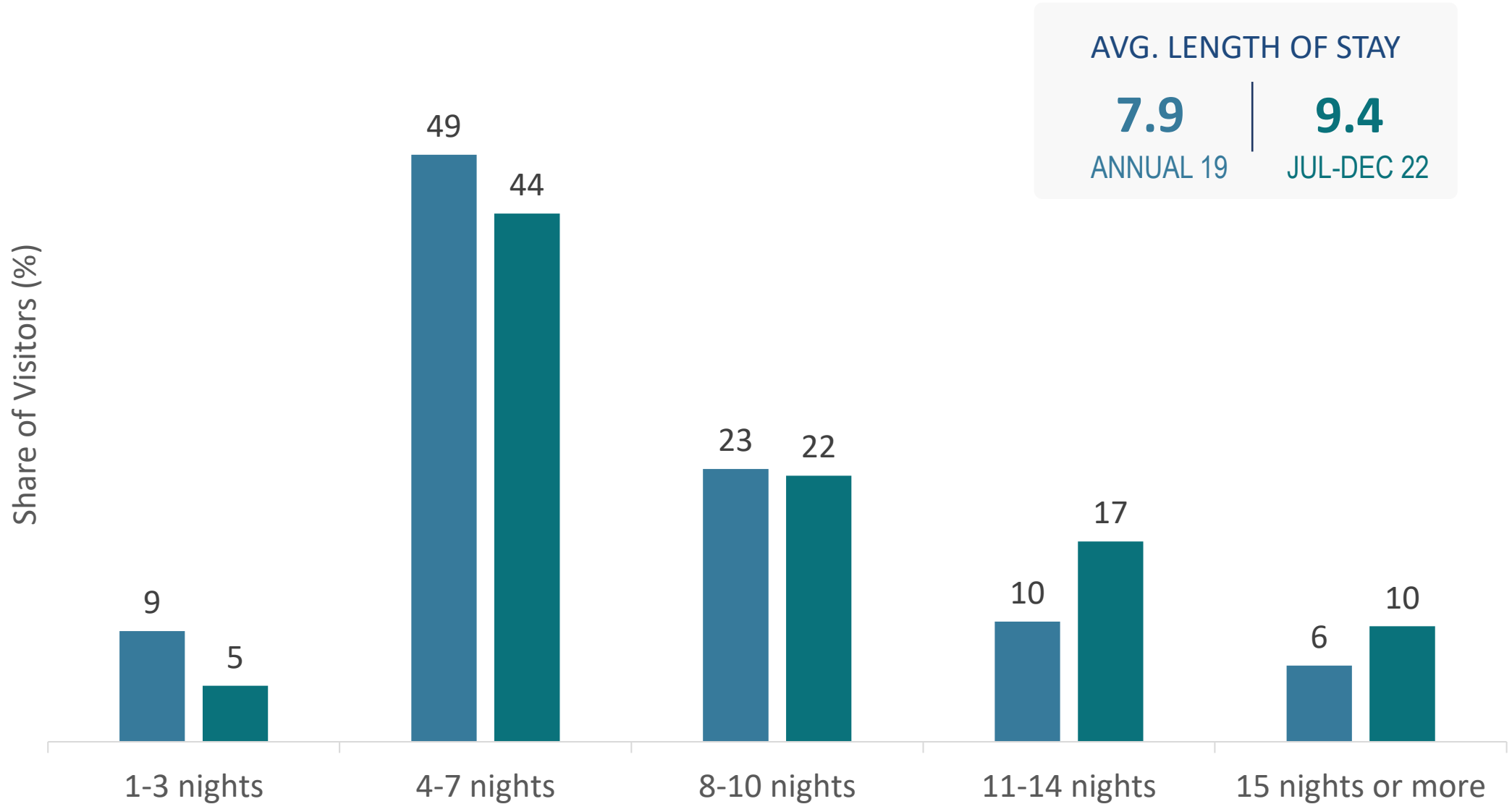
Note: due to rounding, total does not sum to 100%

Previous Visits



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

Length of Stay (nights)

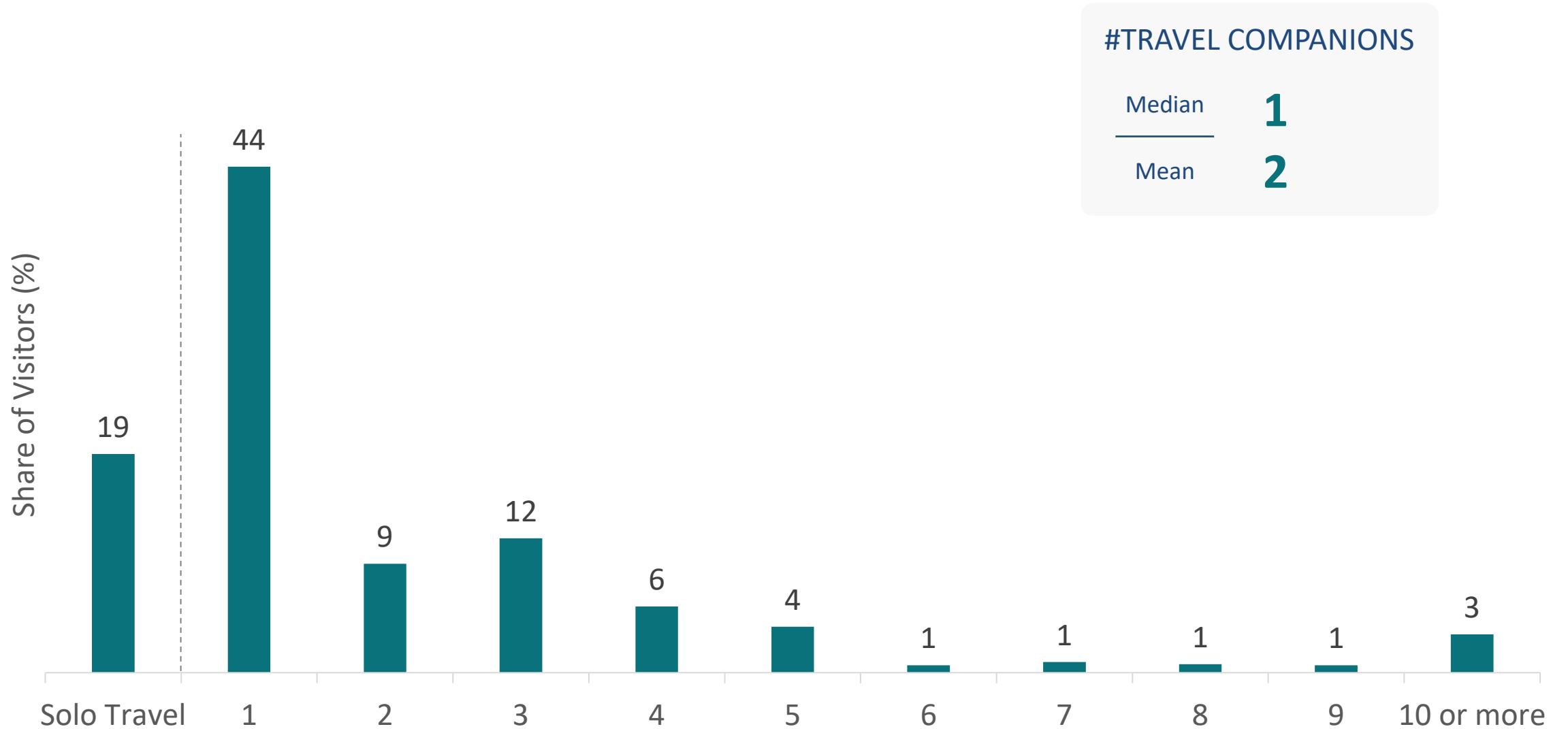


AVG. LENGTH OF STAY
7.9 | **9.4**
ANNUAL 19 | JUL-DEC 22

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

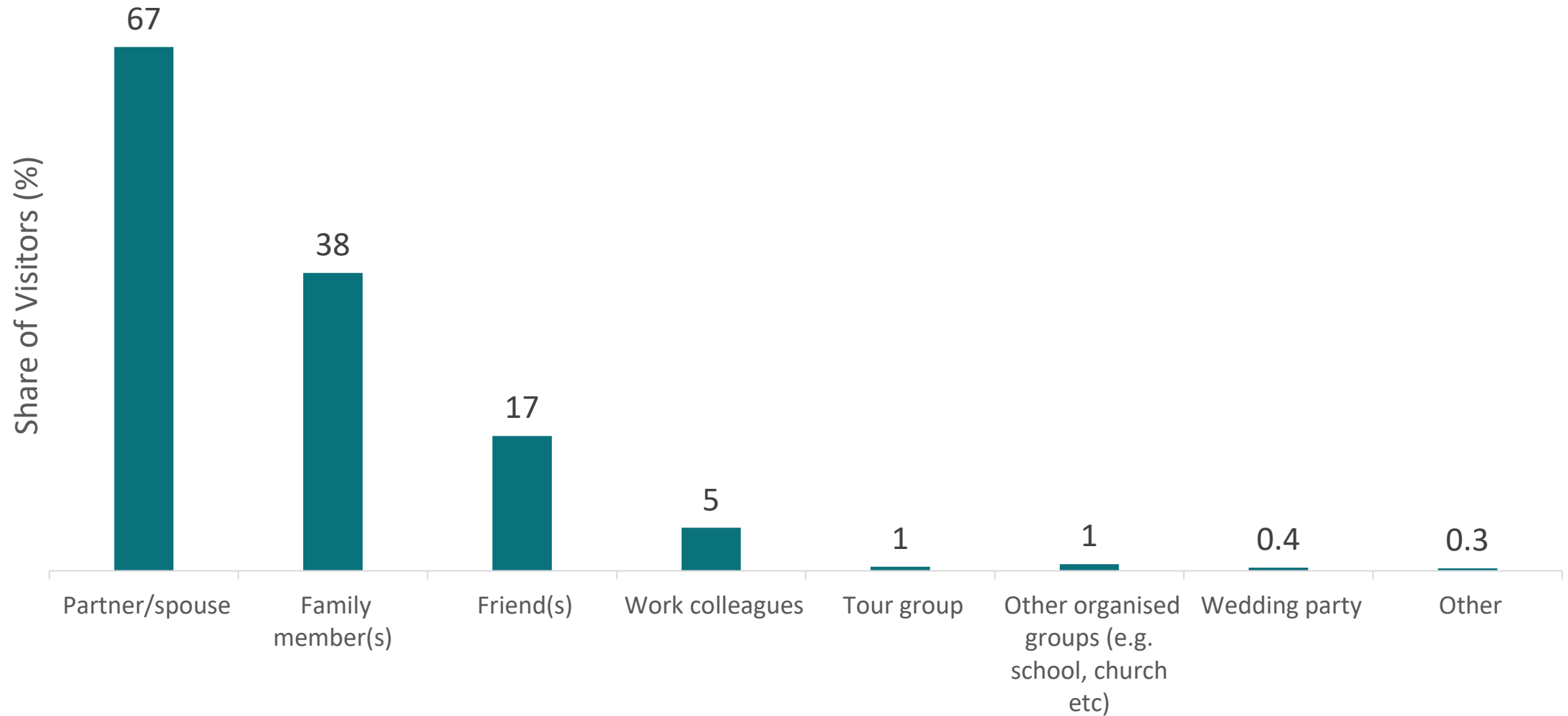
■ Annual 2019 ■ Jul-Dec 2022

Travel Group



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

Travel Companions



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

Airlines Used for Travel



Others

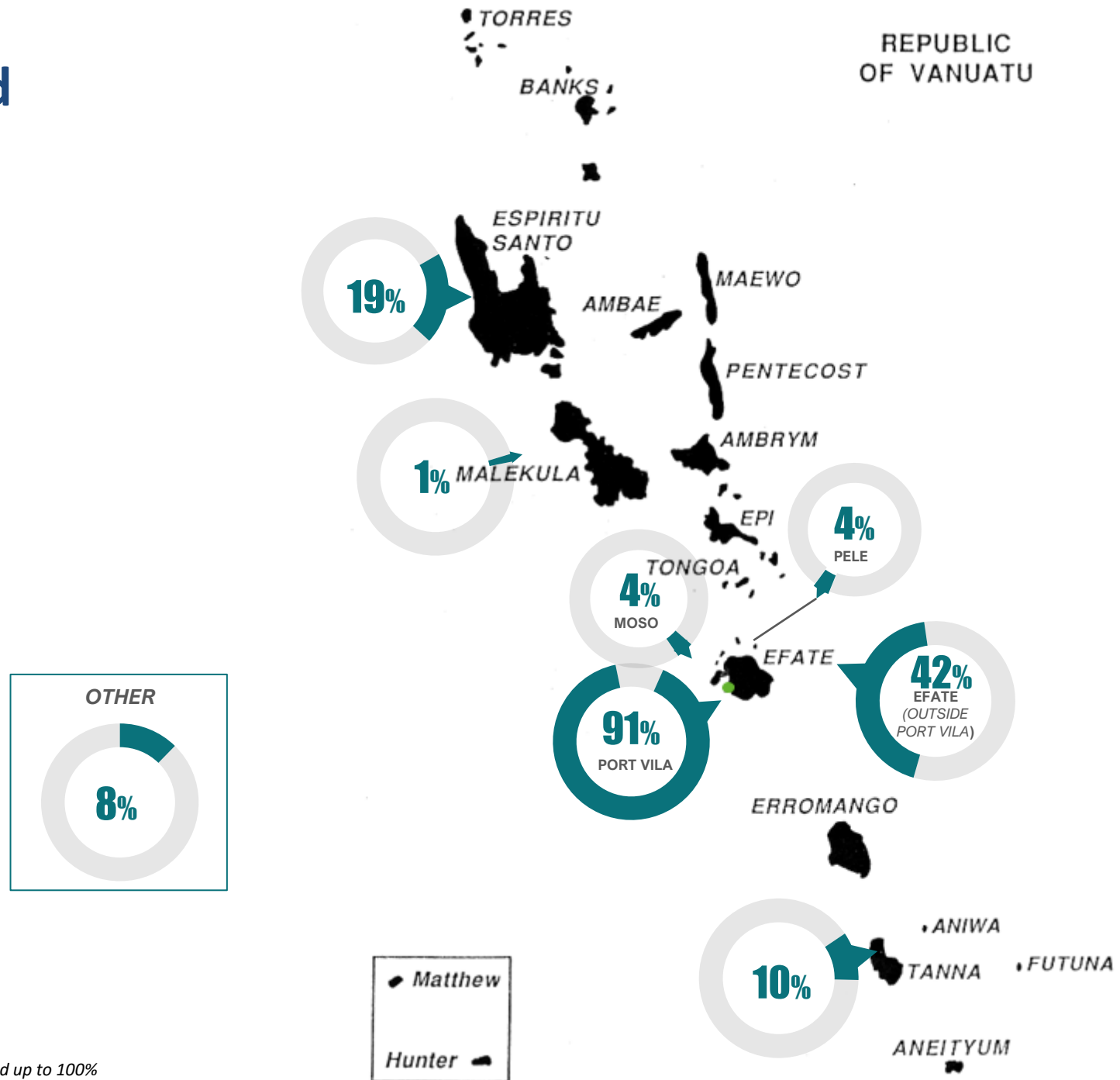
(Air Niugini, Solomon Airlines, Qantas, Qatar Airway)



Share of Visitors (%)

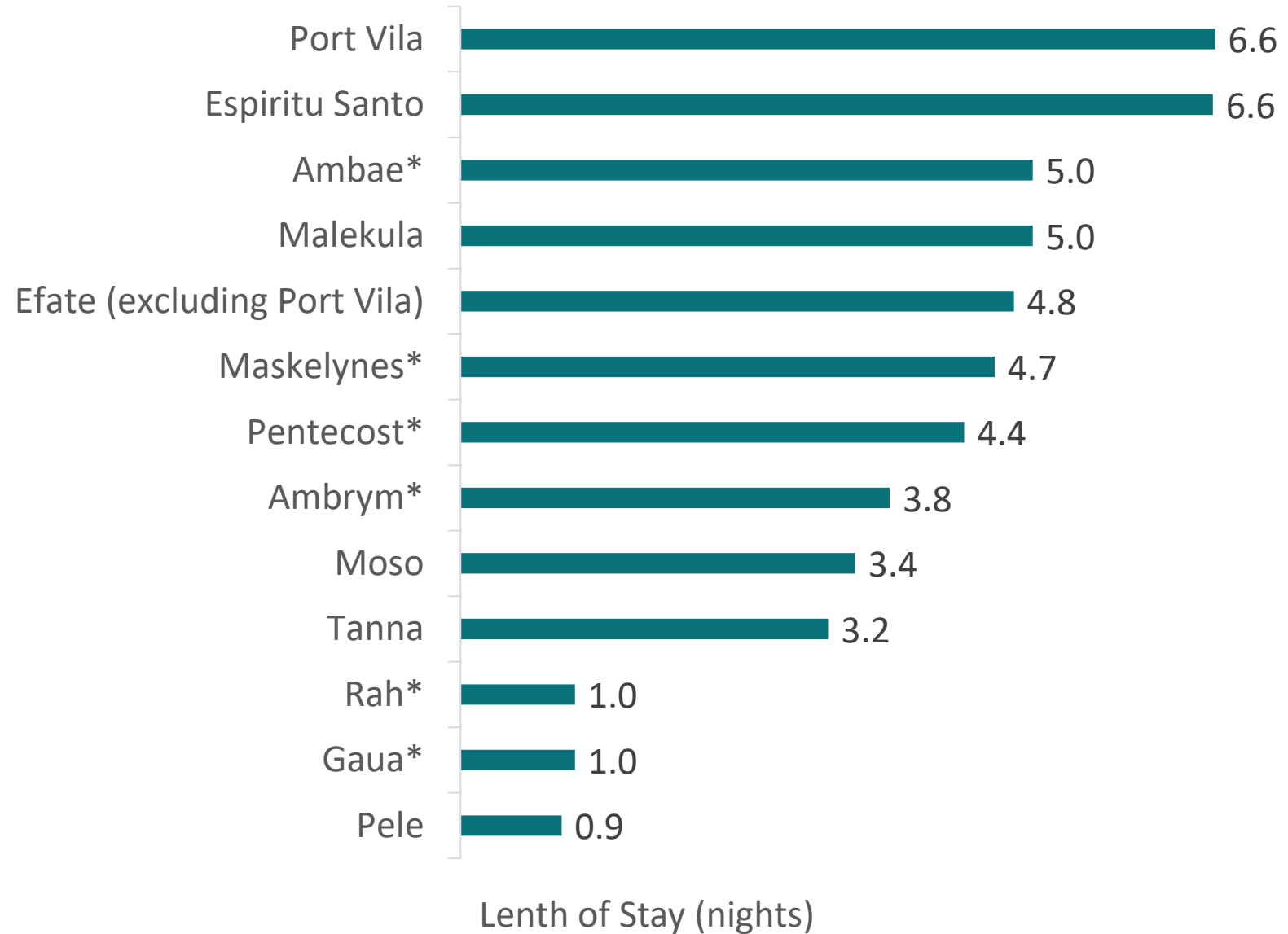
Note: Multiple responses, therefore total does not add up to 100%

Islands Visited



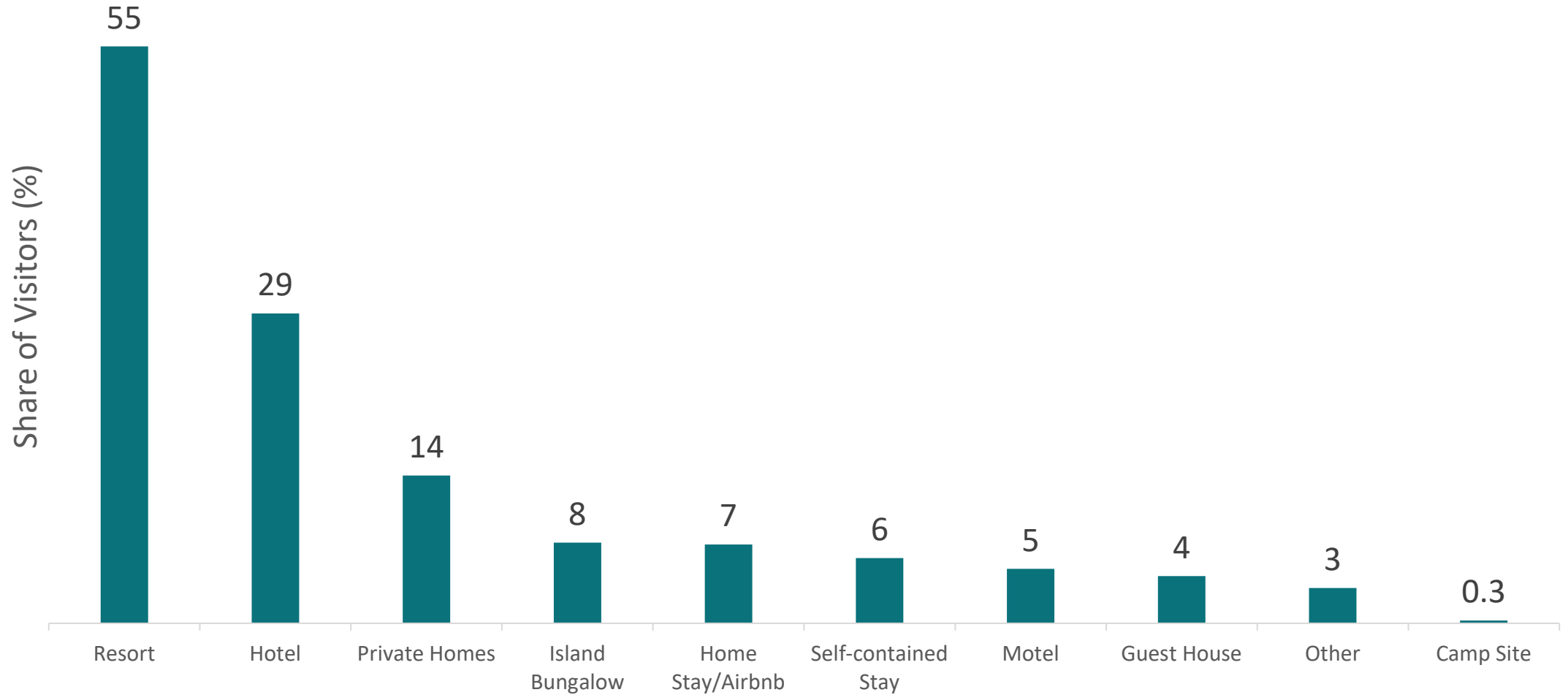
Note: Multiple responses, therefore total does not add up to 100%

Average Length of Stay on Islands



Note: * Average LoS based on less than 10 visitors.

Accommodations



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

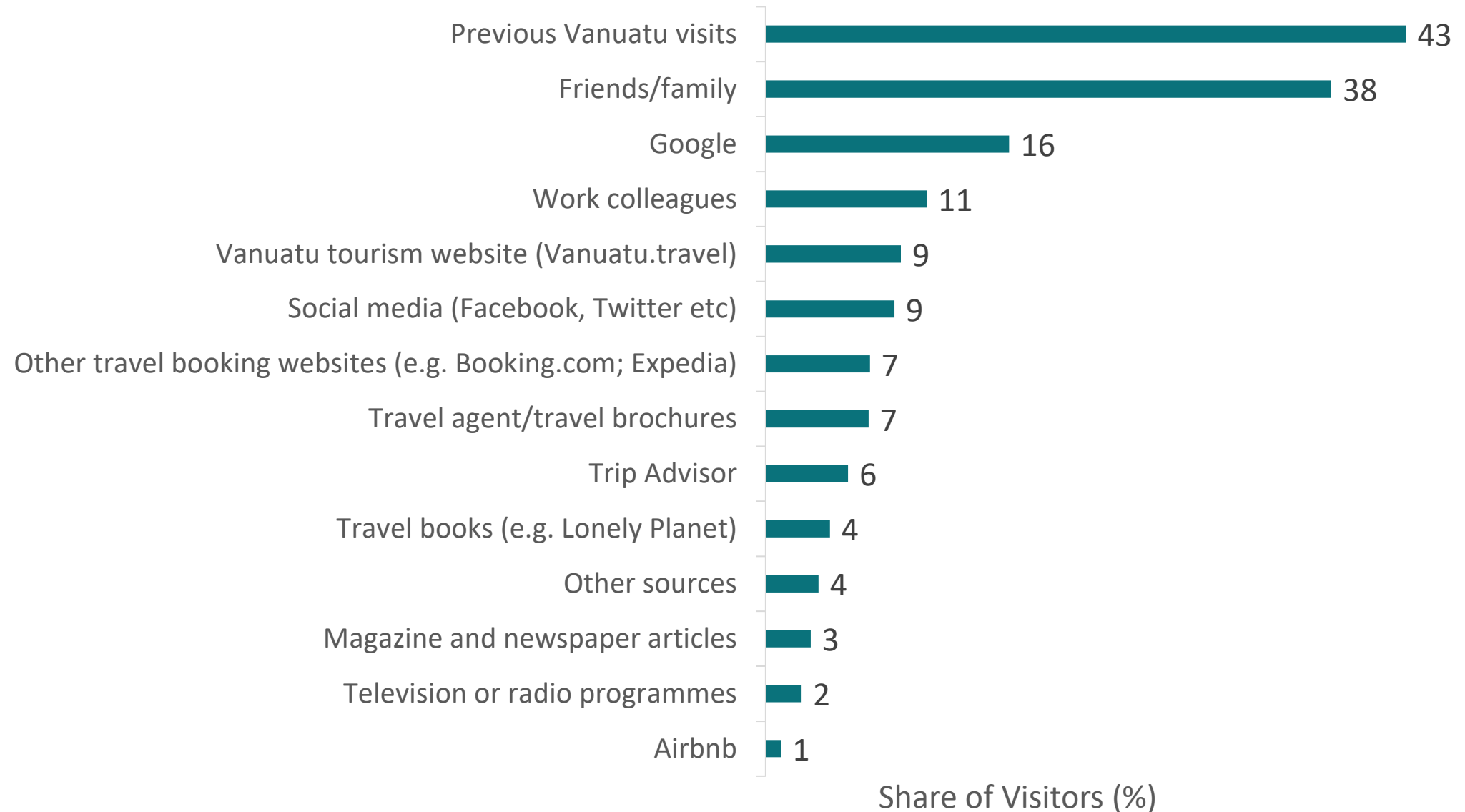


Visitor Spending
and Impact

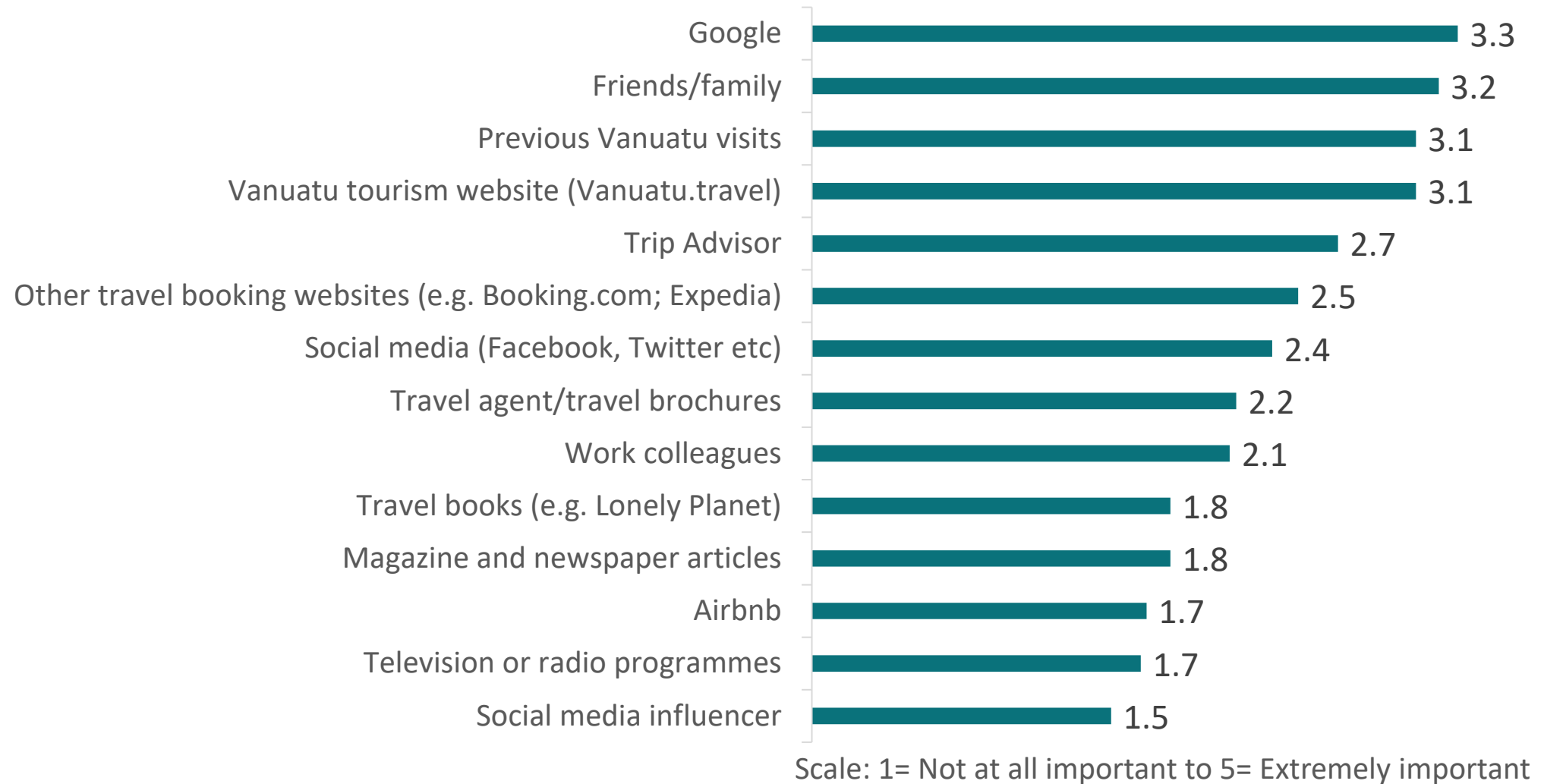


Visitor
Satisfaction

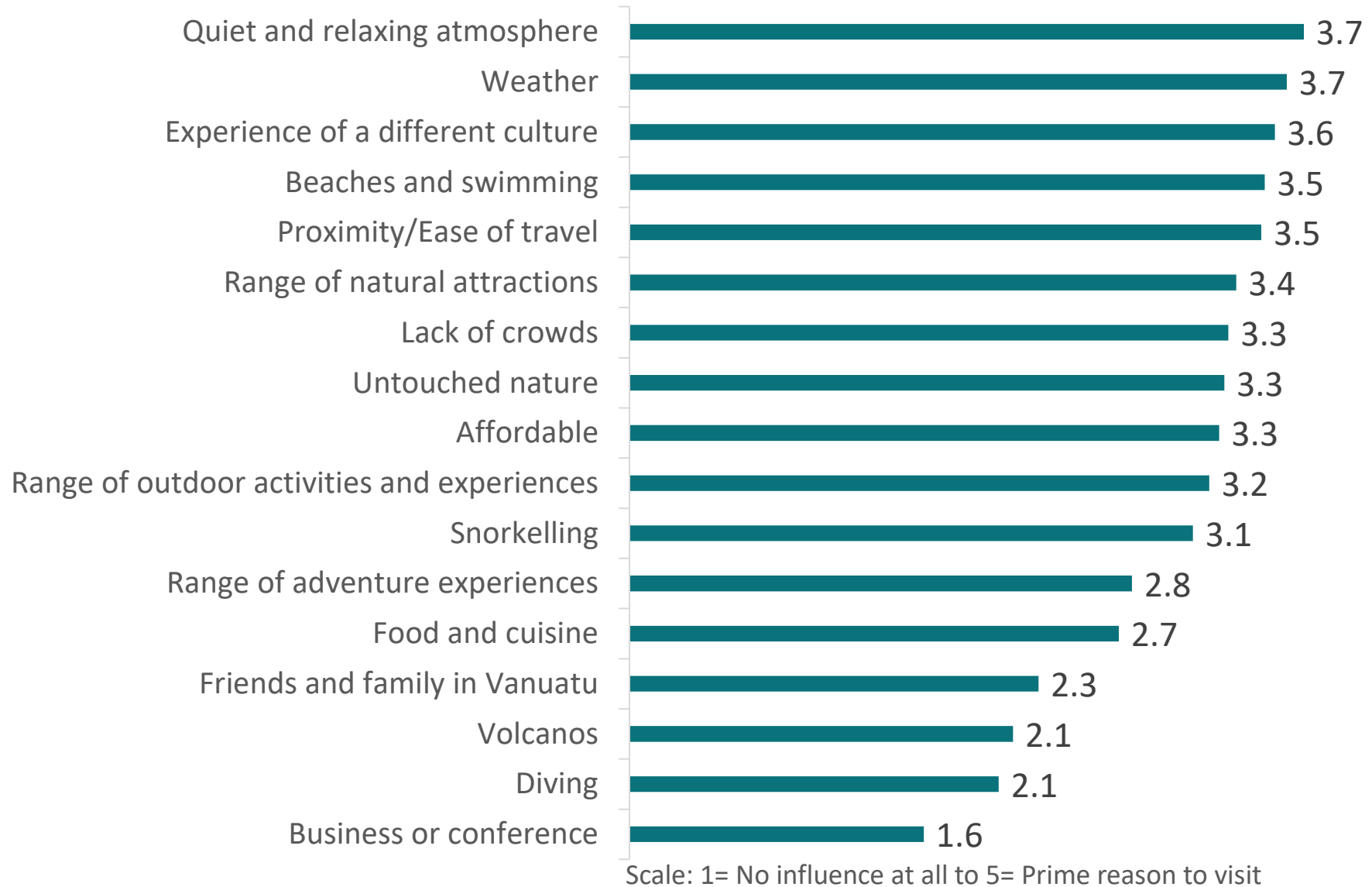
Information Source: How did you find out about Vanuatu as a destination?



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



Influential factors to travel to Vanuatu



Purchasing of Travel



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

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

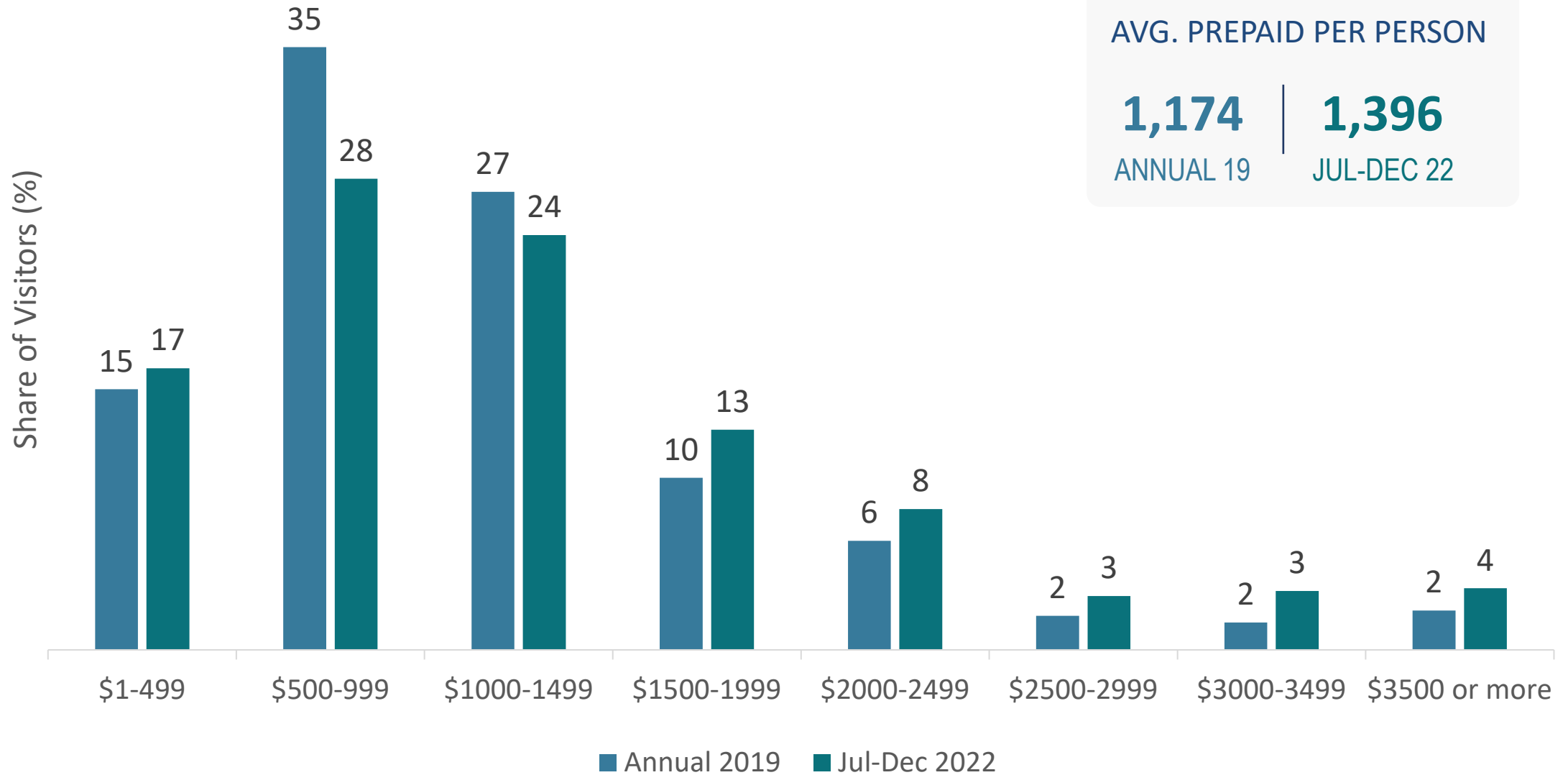


Visitor Spending
and Impact



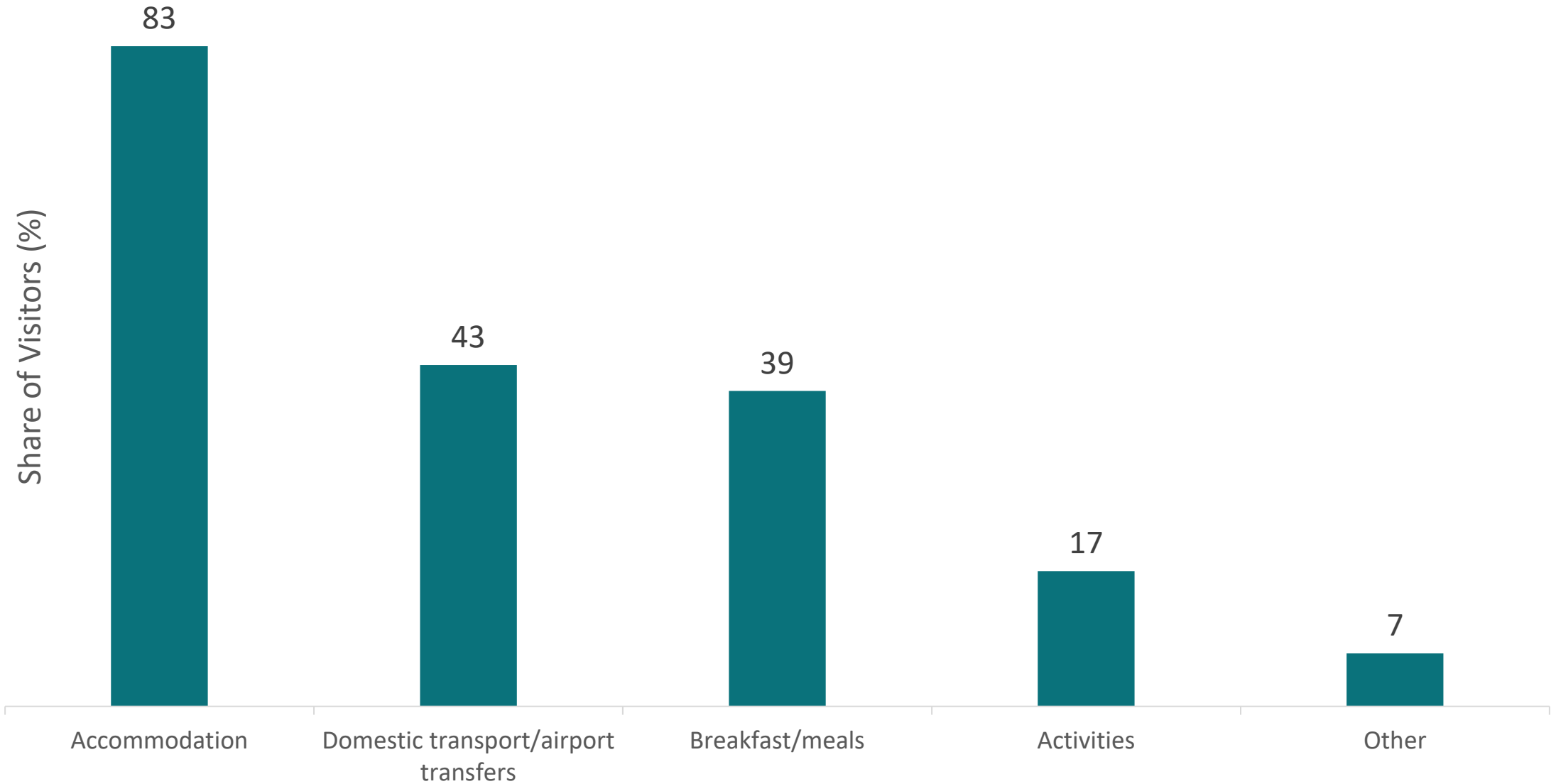
Visitor
Satisfaction

Prepaid expenditure



Note: In US dollars.

Prepaid Items



In-country Spend Per Person Per Day While in Vanuatu

	ANNUAL 2019		JUL-DEC 2022	
	<u>% of sector</u>	<u>USD</u>	<u>% of sector</u>	<u>USD</u>
Accommodation	24	20	39	41
Food & Beverage	31	26	29	31
Retail	10	9	9	10
Domestic Travel	8	7	6	6
Entertainment & Internet & Service	7	6	4	5
Local Transport	5	4	4	4
Tour	8	7	4	4
Duty Free	3	3	2	2
Souvenir	4	3	2	2
TOTAL	100%	\$86 9,816 VT	100%	\$105 11,991 VT

Note: Average exchange rate VUV-USD for annual 2019 and July to December 2022 are applied respectively.

Economic Impact – Per Person and Total

	ANNUAL 2019		JUL-DEC 2022	
	USD	VUV	USD	VUV
Average Spend Prior to Arrival				
Per Person Per Trip	1,174	134,003	1,396	159,345
<i>Flowing into local economy rate – estimated</i>	62.5%		62.5%	
Per Person Per Trip	735	83,895	873	99,590
Per Person per Day	93	10,615	93	10,595
Average Local Spend				
<i>Length of Study (nights) - mean</i>	7.9 nights		9.4 nights	
Per Person Per Trip	681	77,731	987	112,711
Per Person per Day	86	9,816	105	11,991
Total Economic Impact-Per Trip	1,416	161,625	1,860	212,302
Total Economic Impact-Per Day	179	20,431	198	22,585

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
and Impact

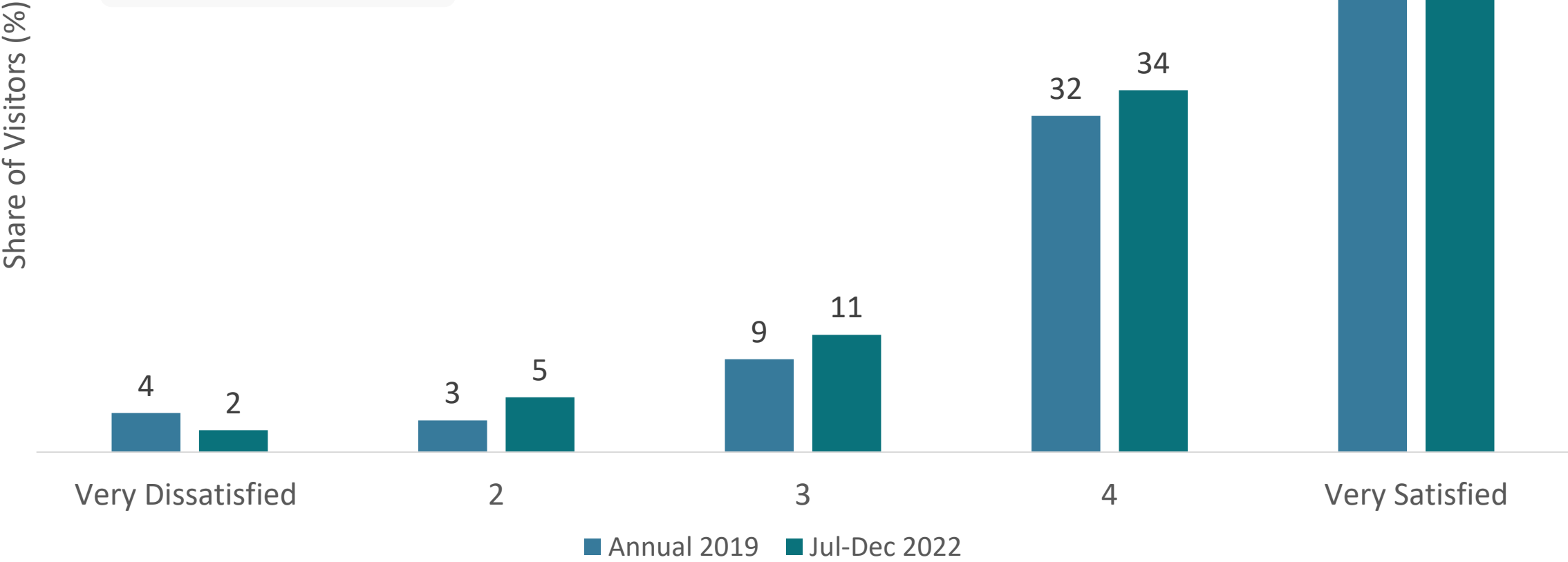


Visitor
Satisfaction

Visitor Overall Satisfaction

OVERALL SATISFACTION

4.3 | **4.2**
ANNUAL 19 | JUL-DEC 22



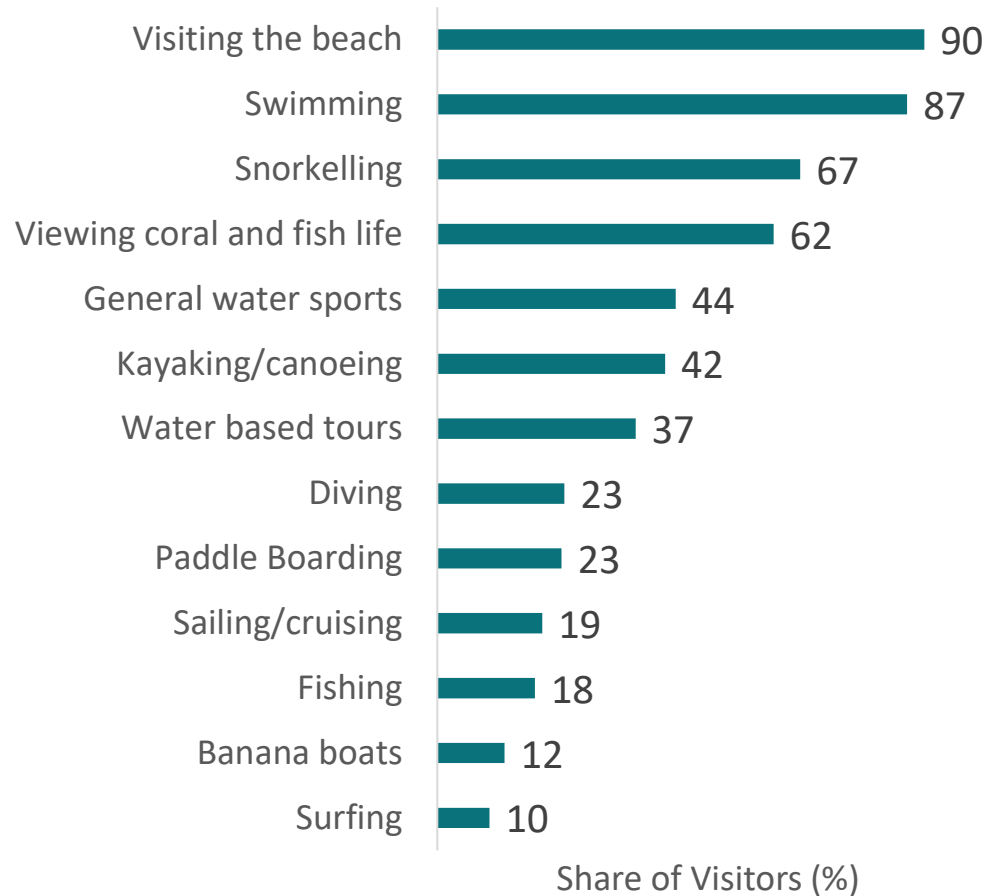
Satisfaction with Travel Experience



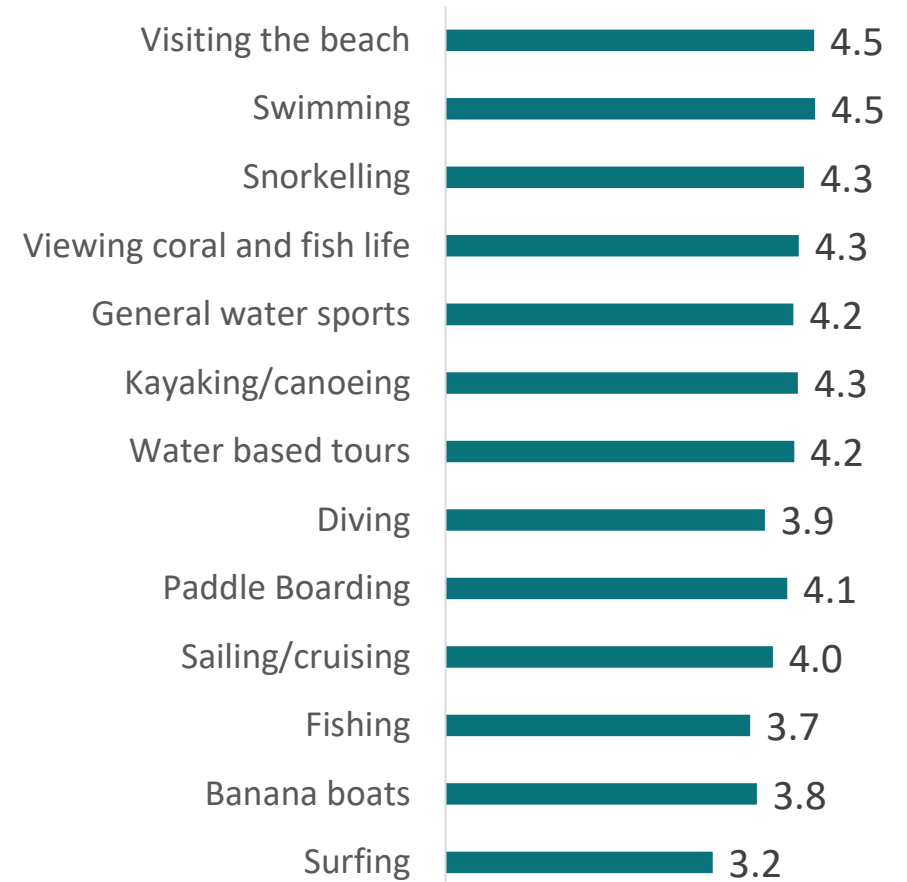
Scale: 1=Not satisfied at all to 5=Extremely satisfied

Water-based Activities

Participation



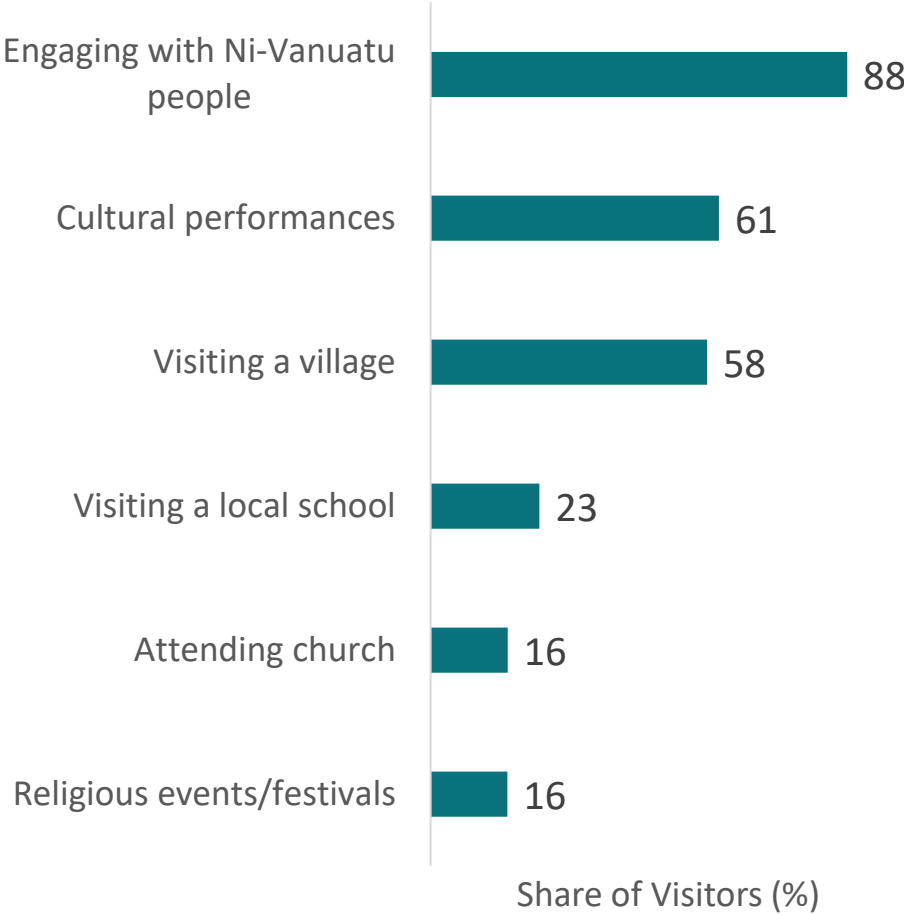
Satisfaction



Scale: 1=Very dissatisfied to 5=Very satisfied

Cultural Interaction

Participation



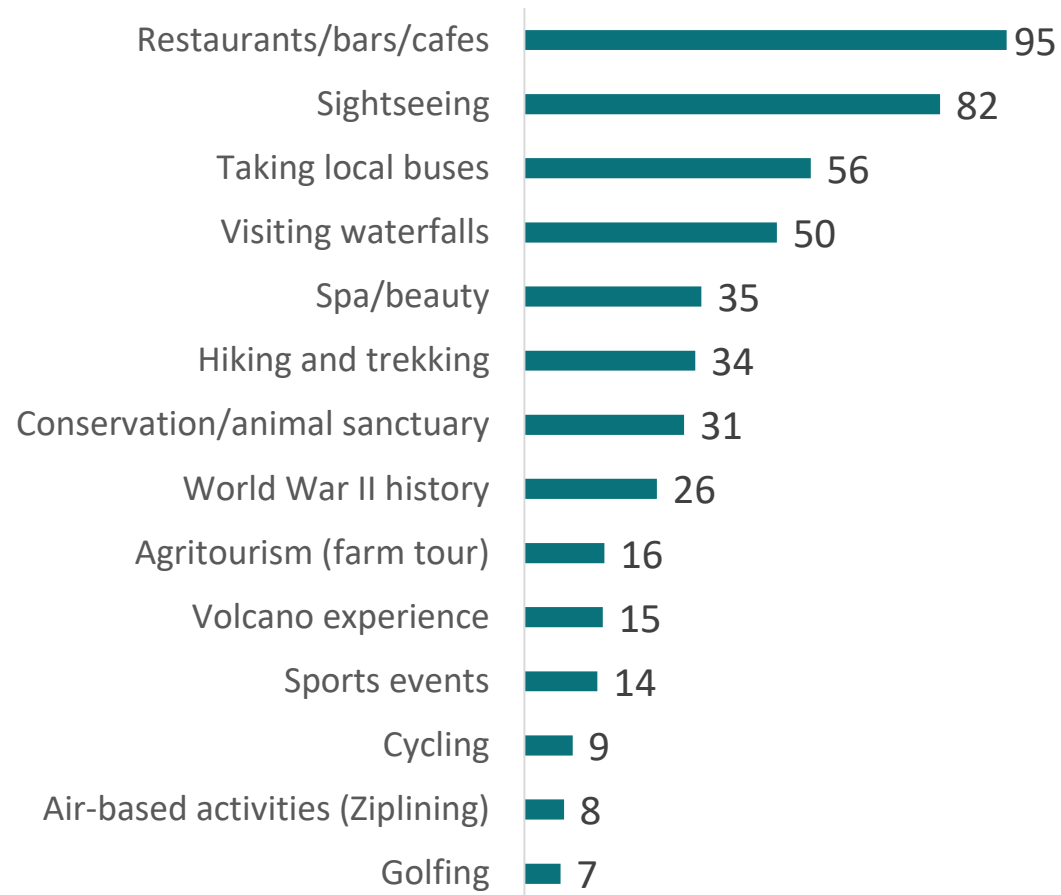
Satisfaction



Scale: 1=Very dissatisfied to 5=Very satisfied

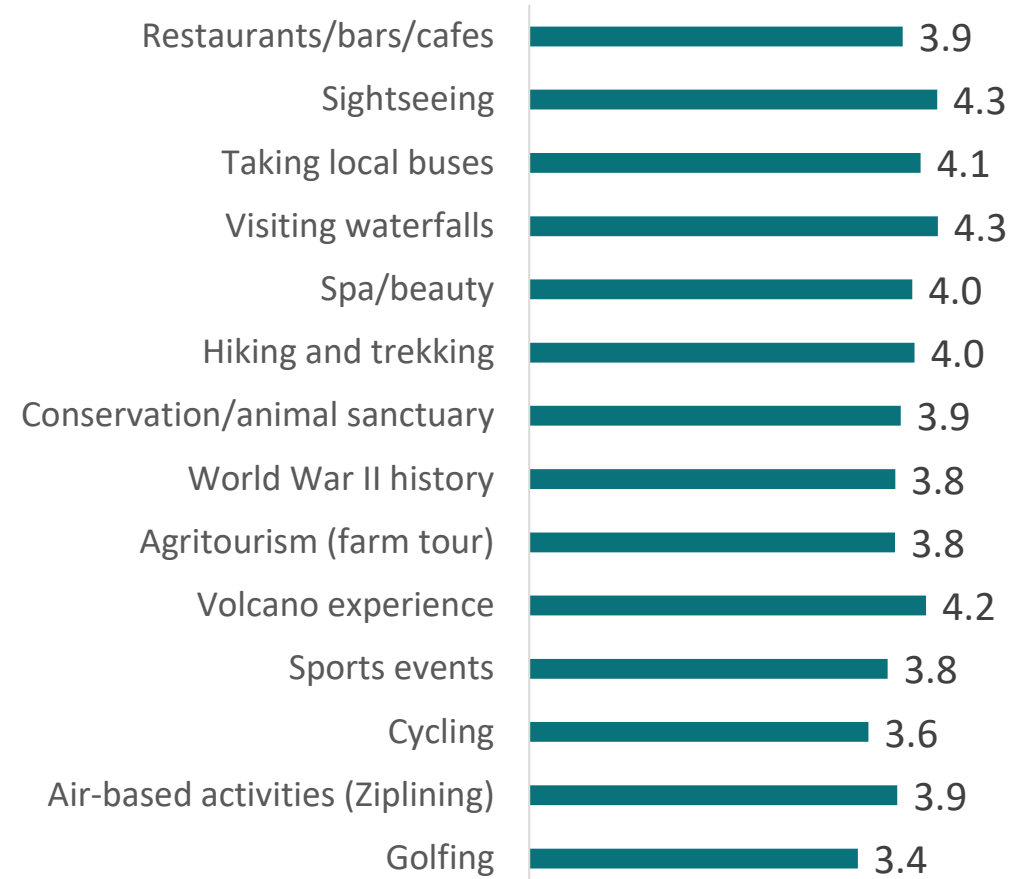
Land-based Activities

Participation



Share of Visitors (%)

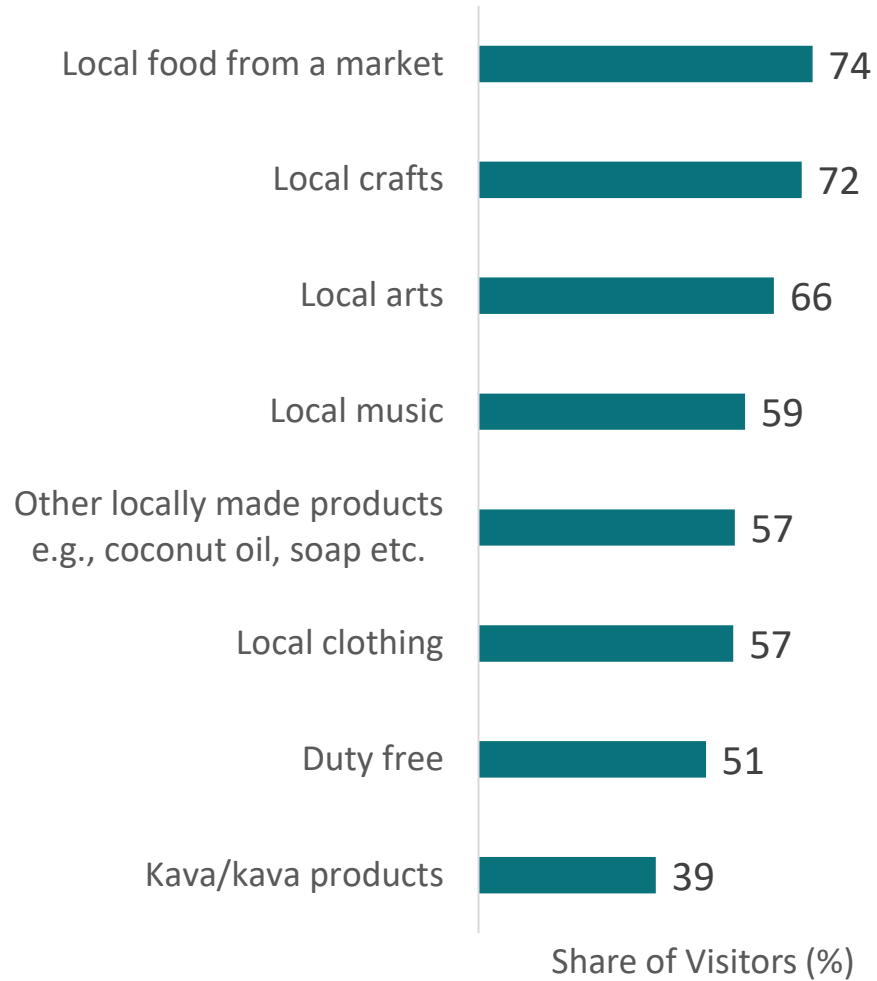
Satisfaction



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%. Total number of comments N=996.

Most Appealing Aspects – Local People

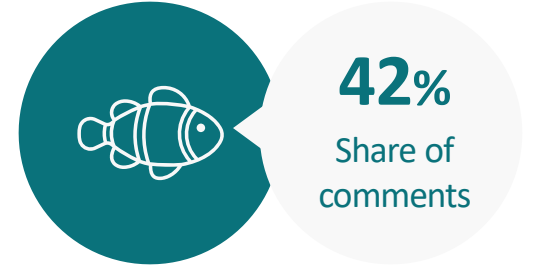
- + Friendly welcoming people.
- + Very friendly people with a great attitude.
- + The ni vanuatu people were very welcoming and friendly.
- + The people:- Everywhere, the people are so friendly, happy and helpful.
- + I love the people and the country.
- + The people were so welcoming and friendly as I have a young baby and they absolutely adored him it was so cute.
- + The most attractive is the friendliness of the people, and their faith.
- + The atmosphere and especially the kindness of all the people are always the exceptionality about Vanuatu. There is no other culture that is as welcoming and loving, and feels like family from the moment that you meet them.



49%

Share of
comments

Most Appealing Aspects – Environments, Cleanliness, Climate



- + The beaches and water clarity.
- + The general environment - Clean, beaches. the few I visited.
- + The natural beauty of Vanuatu is unmatched.
- + The landscape, the clean clear water and the all the natural vegetation all around.
- + ...all of Vanuatu is beautiful if I had to choose I would say the cascade water fall amazing.
- + Beautiful scenery.
- + The lack of crowds and natural untouched beauty, especially of the bay and coral. Friendly local people.
- + Untouched nature. Swimming. Snorkelling.
- + Cleanliness of the place in Port villa and the blue lagoon.
- + The overall natural beauty especially the beaches in Santo, given how undiscovered Vanuatu is there are so many hidden places & lack of tourists.

Most Appealing Aspects – Activities and Attractions

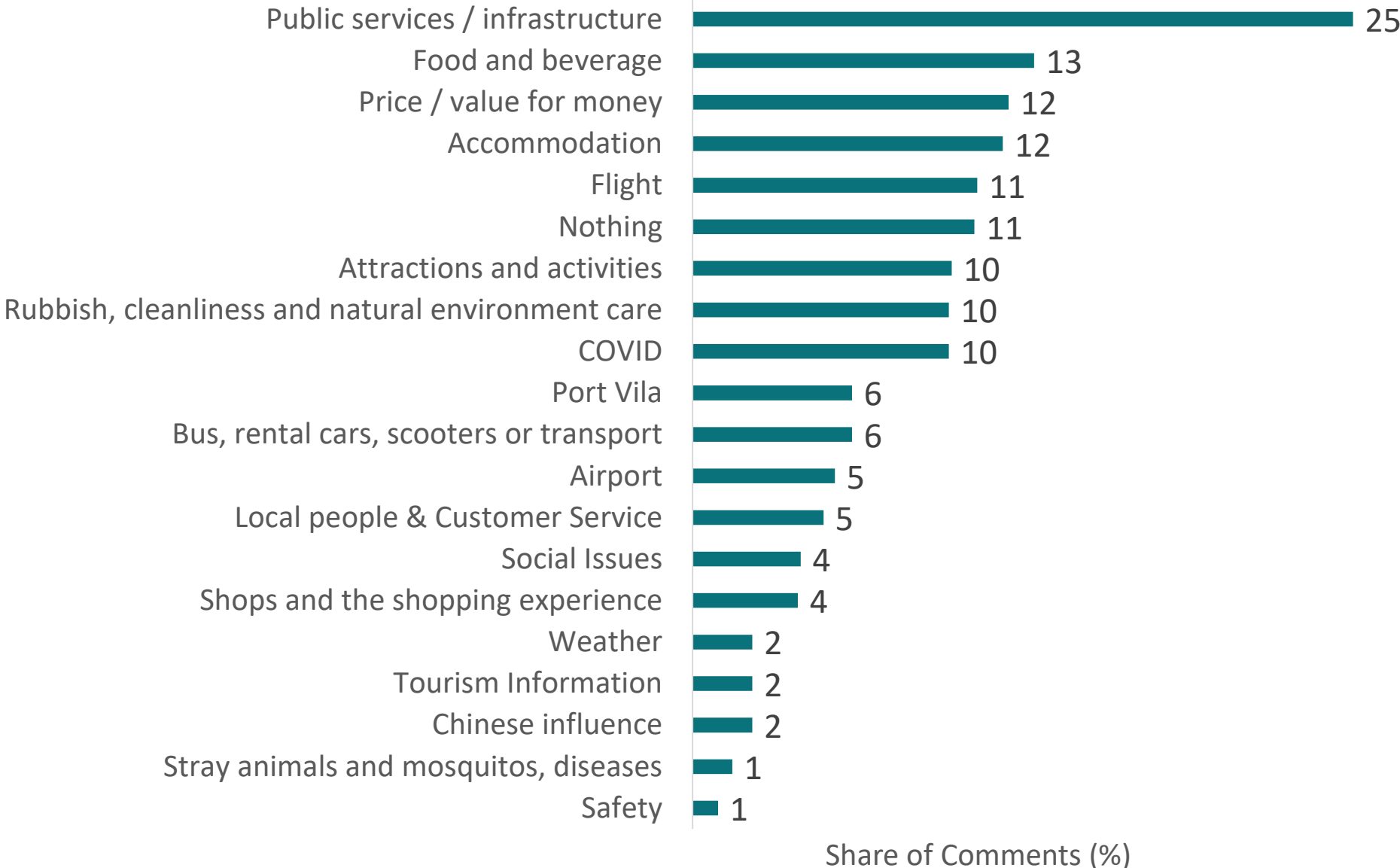
- + The diving.
- + Snorkelling and Tanna volcano.
- + Volcano visit.
- + Fishing and relaxation.
- + White beach in Tanna.
- + The beach and snorkelling is always good.
- + Beaches and blue holes, water activities.
- + Visiting the turtle sanctuary.
- + Tribe ceremony 26 December - handing over burning stick.
- + Coral snorkling and horse riding.
- + volcano tour in Tanna was the highlight.
- + The volcano experience in Tanna was great.
- + Vanuatu is a beautiful country to relax and unwind in with plenty to do and see.



22%

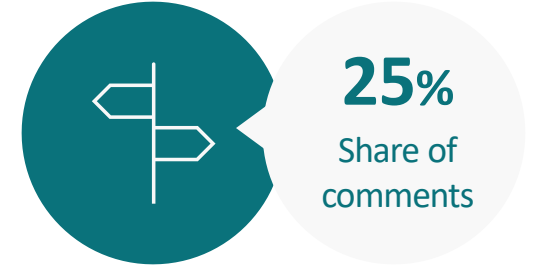
Share of
comments

Least Appealing Aspects



Note: Multiple responses, so total does not add up to 100%. Total number of comments N=940.

Least Appealing Aspects-Public Service and Infrastructure



- + The roads.
- + Potholes in the road & broken footpaths.
- + Limited infrastructure, poor hygiene standard, lack of staff at resorts.
- + How things had run down during covid.
- + Lack of facilities.
- + The internet service data coverage.
- + Roads on Santo are terrible -haven't been maintained.
- + No clean toilets, clean running water to wash hands, if you found a toilet the floors were filthy and toilets were dirty too.
- + Roads are shocking / uncomfortable to drive on. Some service was very slow. Food was always average. Air Vanuatu was unreliable.

Least Appealing Aspects – Food & Beverages



- + Food - lack of vegetarian options.
- + Could be more variety of food (local), no fish available.
- + Le Cafe gave us food poisoning.
- + Food, excessive price for everything, very poor level of service.
- + The poor quality food and food prices were very high. (I understand a lack of supplies and shortage of staff created issues)
- + Food and beverage, relaxing - spa etc facilities, food options - expected significantly higher standards and quality - price for average quality was very high relative to rest of the world
- + High quality restaurants are very minimal and hard to book into for breakfast or lunch or dinner with kids. Medium level restaurants were very expensive and food always running out or very low supply. even sometimes water bottles.

Least Appealing Aspects – Price & Value for money



- + Price of accommodation.
- + High taxi price and entry fees for very mediocre waterfalls.
- + Really expensive visit overall, the money is not trickling down to the local community!!!
- + Entry fees to every place which are too expensive and not regulated.
- + It's not an affordable holiday anymore. We've been to Vanuatu four times now as a family. And it could be our last. We went to lunch at a Japanese and it cost three times more than what it would cost in NZ.
- + Horribly expensive for what it is now, you pay for everything...been there 3 times previously, and you can see how prices skyrocketed 3-4times what they were pre-covid. Service in almost every restaurant/cafe was incredibly slow.
- + The cost of everything, including our Iririki resort. It is old, and tired and needs refreshing. For the price we paid, we expected a far nicer place. Even the service from the staff was not always very attentive. Internet and power kept dropping out. Food was not great. Just not the experience we expected for the amount of money we paid. We would have heaps better value for that amount of money at home.

Least Appealing Aspects – Flight-related issue



- + Communication with airline
- + The frequent changes in flight times
- + Air Vanuatu flight delays, arrival lines at Vila airport
- + Disorganisation and poor service of Air Vanuatu. Stayed 5 nights longer than we should have, poor organisation and communication on their part.
- + Late flight arrival time from Sydney (after midnight), cleanliness of local buses.
- + Air Vanuatu, international and internal flights. Unreliable, baggage doesn't arrive, cancellations occur with no information.
- + Travel - arriving late at night and having to stay in Port Vila for several nights
- + poor service and quality of air Vanuatu.
- + Air Vanuatu schedule and cancellation of flights and no communication with air van and then additional cost of accommodation cause we had to stay longer.

Suggestions for Improvement



Note: Multiple responses, so total does not add up to 100%. Total number of comments N=543.

Suggestions for Improvement-Indicative Quotes



Better communication from Air Vanuatu in times of emergency.

Getting Business Class service when travelling Business Class.

Number of flights and reliability.

Roads and pricing.

Reliability of air carrier. Better roads and service in general.



More open, more local food, cleaner, better maintained.

Hard to drive far to get to beaches and some roads were horrible. Very limited on transport to and from places.



Our biggest issue was food shopping - fruit and vegetables, meat etc for staying in a self-contained accommodation. Where to go? Also some of the drivers of local buses were dodgy and felt a little unsafe.

More choice of local hearty food at restaurants and more restaurants easier to find. Also more reasonable food prices.

Suggestions for Improvement-Indicative Quotes

The hotel experience, travel from the airport was disorganised.



The hotel we stayed at initially was so overpriced and did not live up to the advertisements...

Don't let cruise ship passengers in for day trips to use hotel facilities. They were very drunk and disrespectful towards other guests and staff.

Customer service.



Better trained staff, and better stocked restaurants and bars.

Better restaurant service.

Better quality of service and food for the price.

Should reduce the price to get more visitors.



Decent prices for attractions. Not charging for beaches, 30m walk along path to access waterfalls that you then need to pay for again to actually go to.

Taxis (but cheaper) buses are getting crowded.

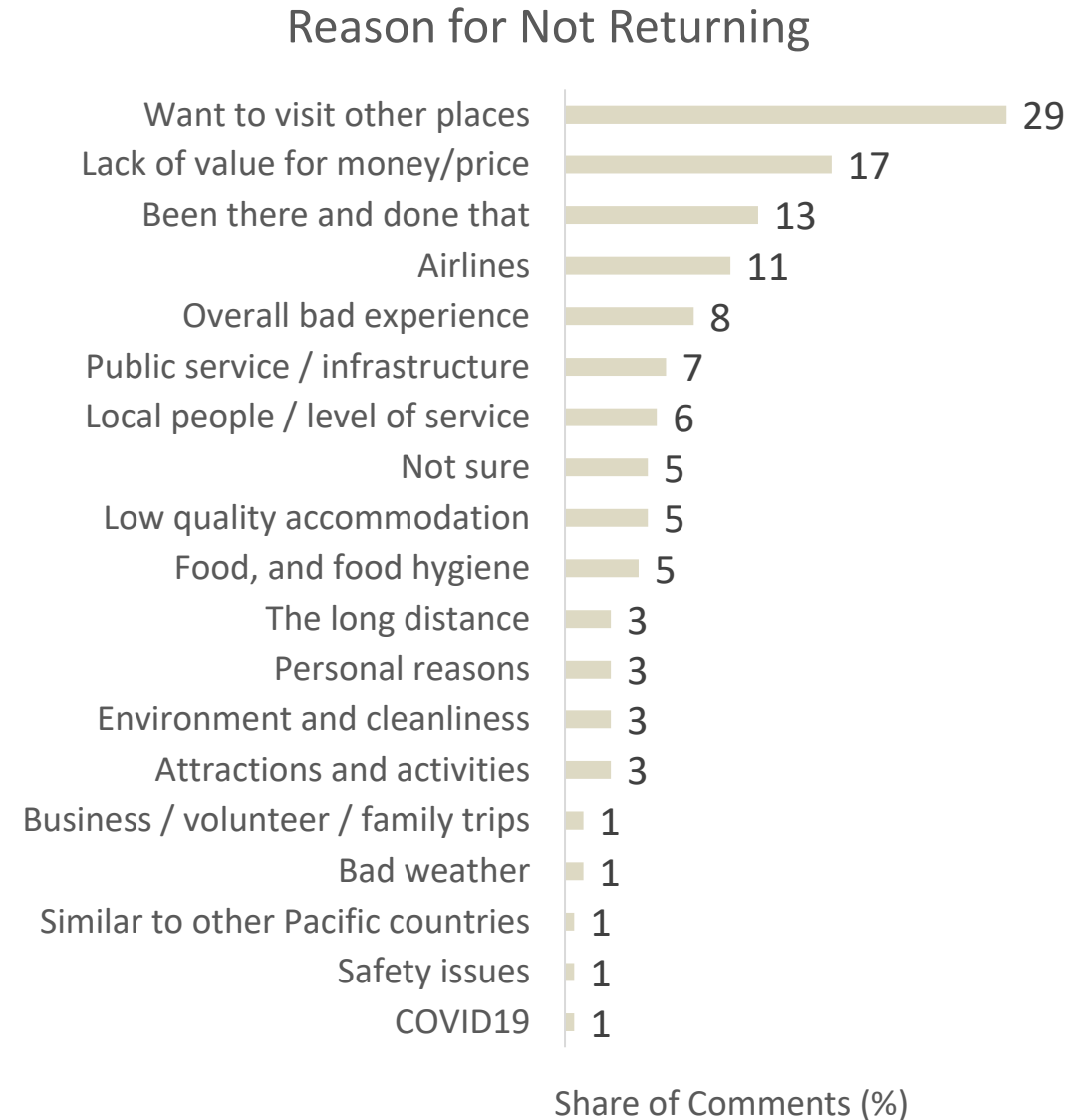
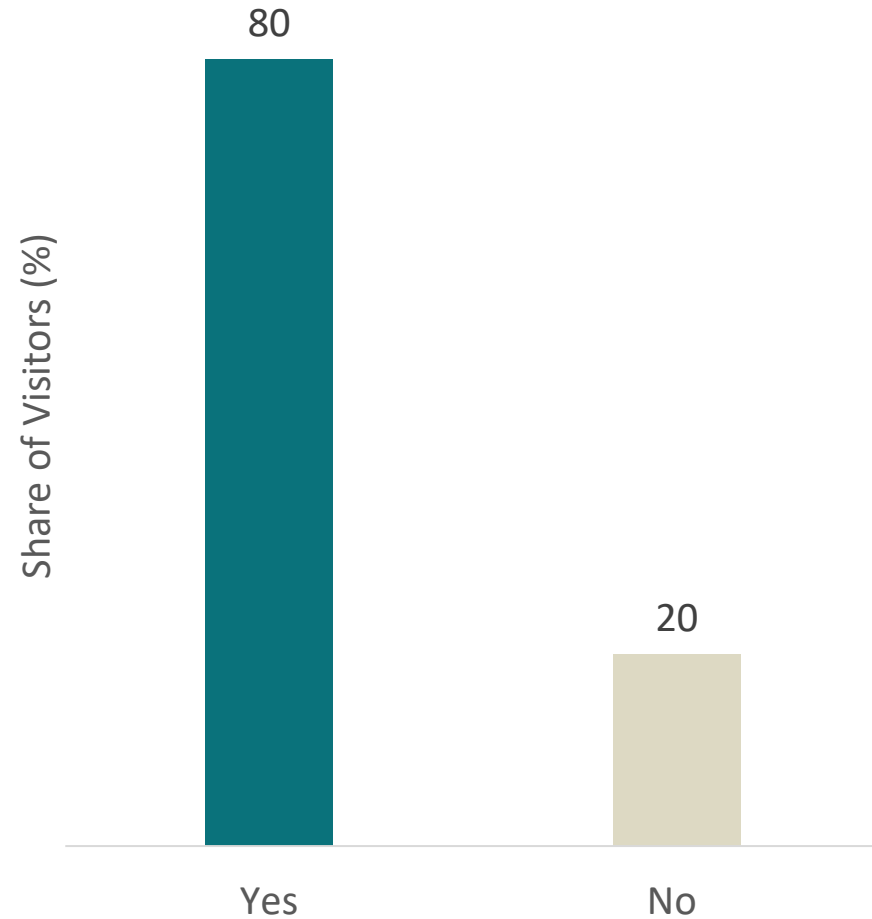
Having more facilities to make it easier to get into town from resorts.



Ability to hire a car for a single day at a time.

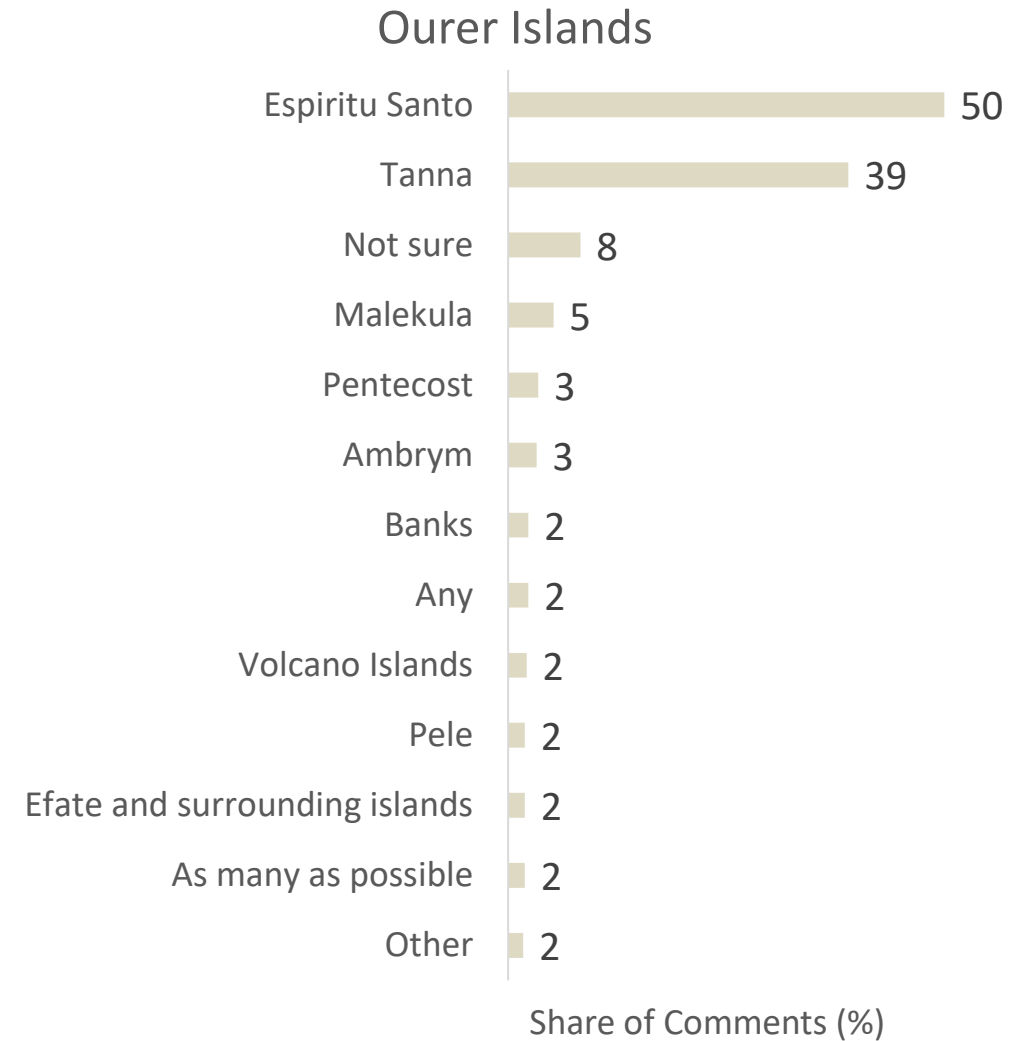
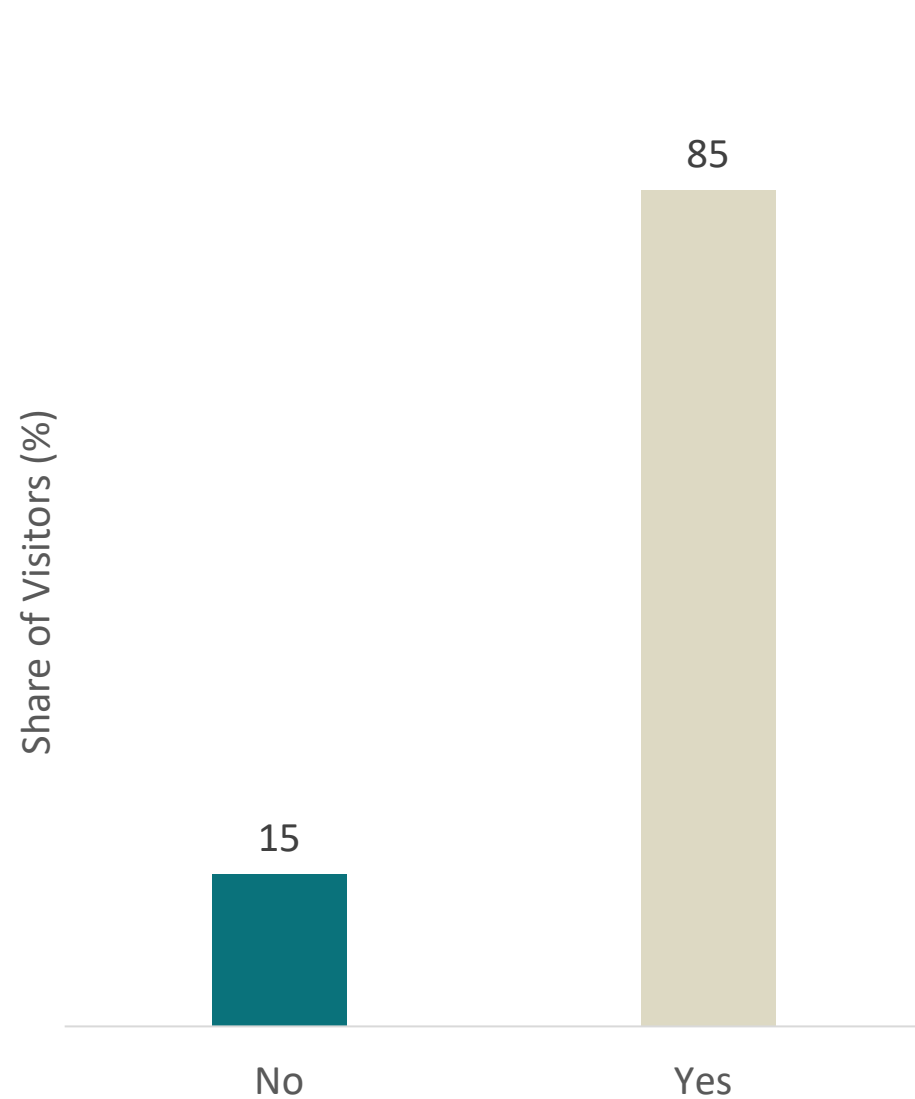
Public transport and communication by Air Vanuatu.

Willingness to Return



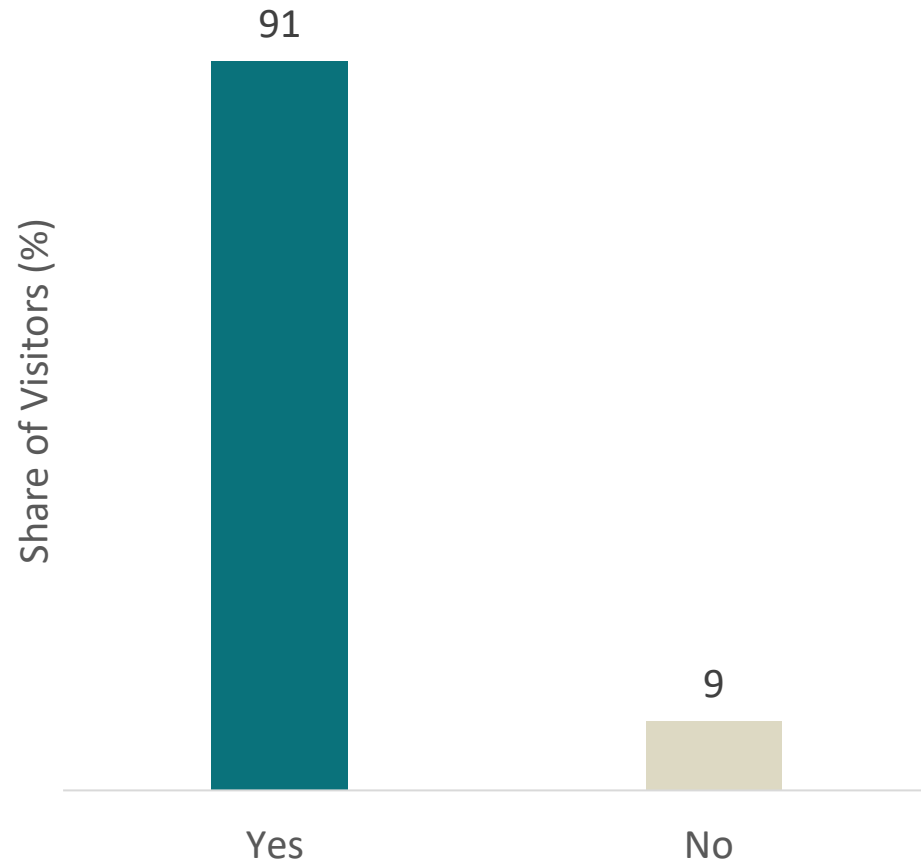
Note: Multiple responses, therefore total does not add up to 100%. Total number of comments N=166.

Willingness to Visit Outer Islands



Note: Multiple responses, therefore total does not add up to 100%; Total number of comments N=518. Islands with fewer than 5 respondents are not included in the result.

Willingness to Recommend



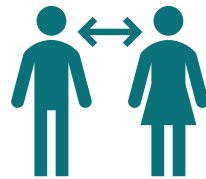
Reasons for Not Recommend



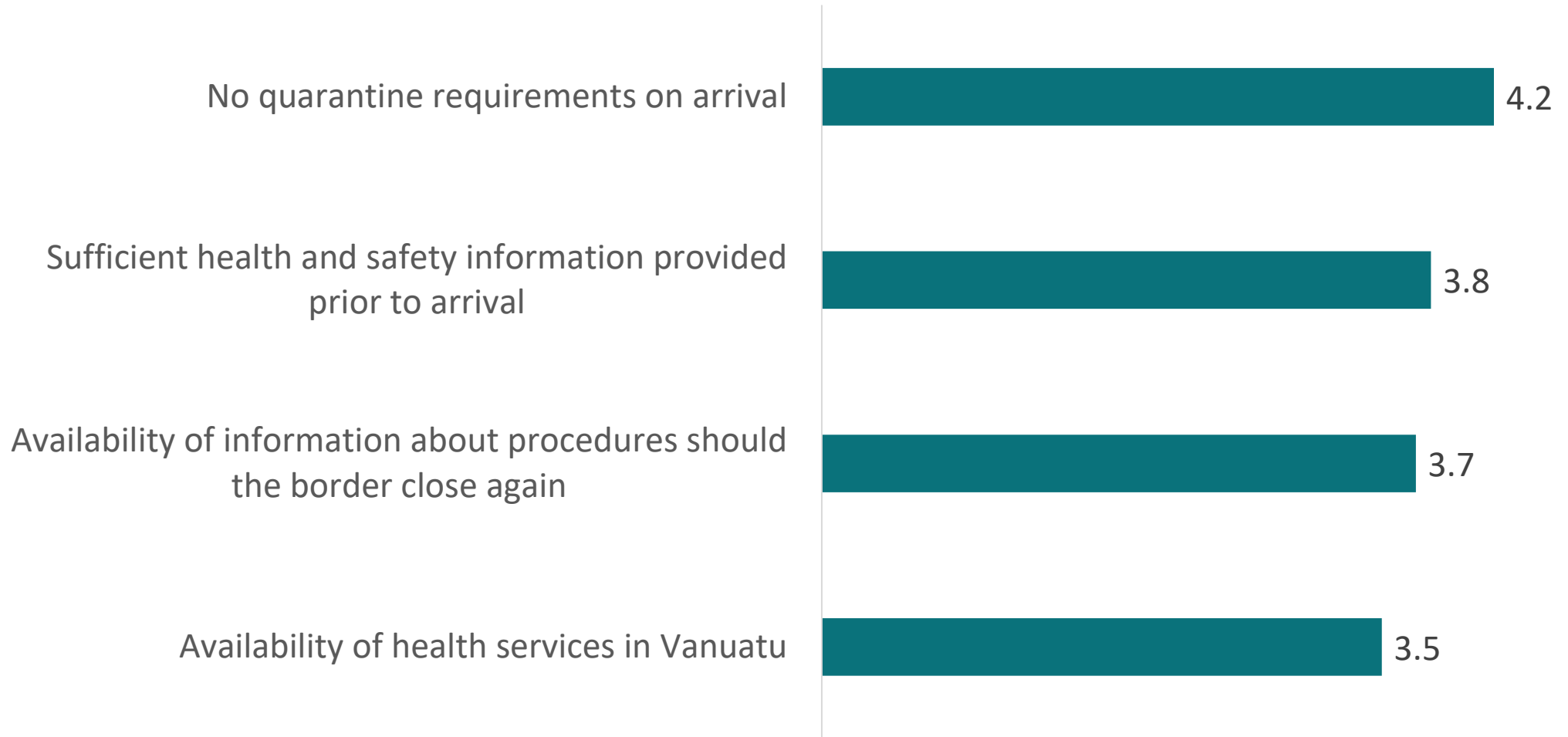
Note: Multiple responses, therefore total does not add up to 100%. Total number of comments N=70.

2022 JUL-SEP VISITORS

COVID RESPONSES

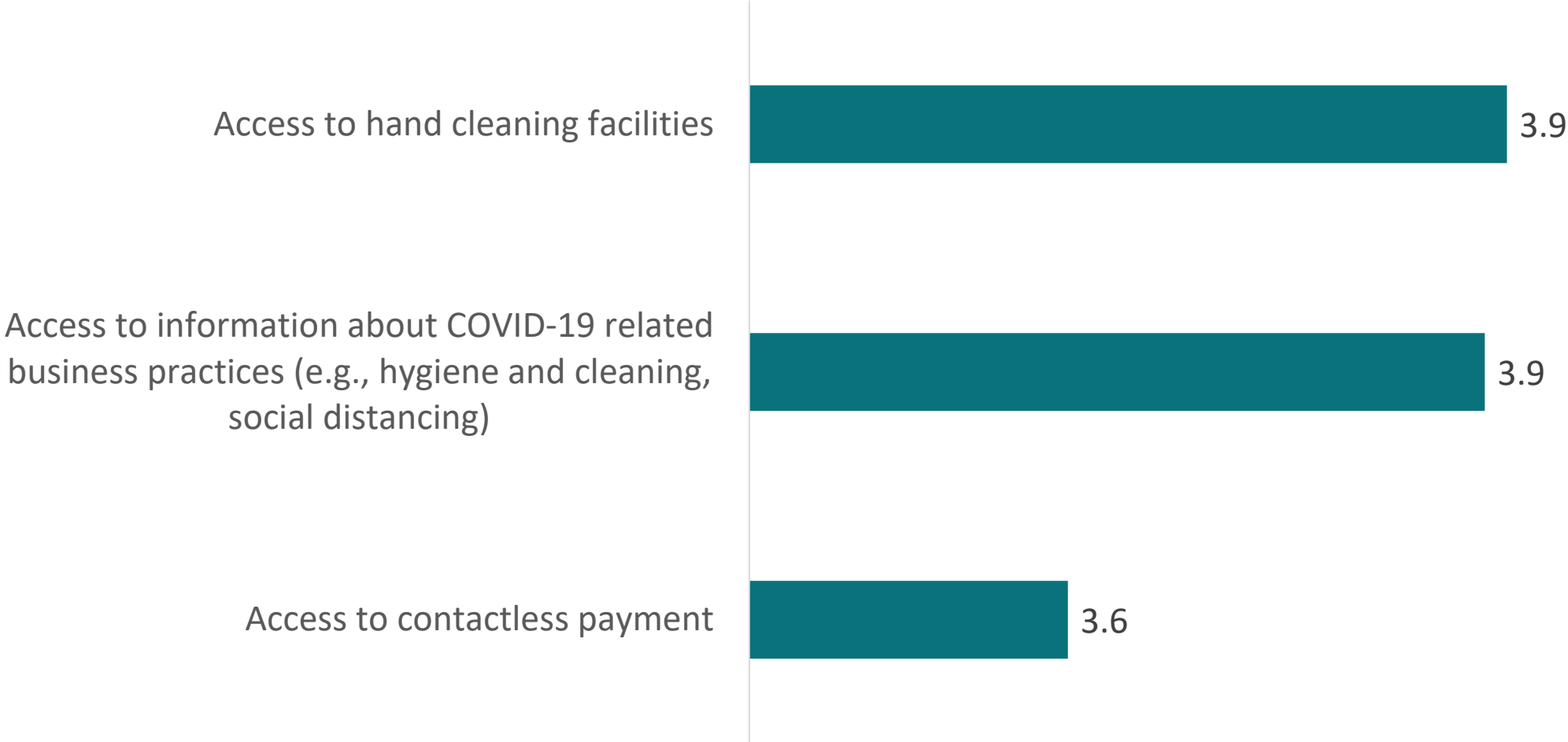


Q How important were the following factors in your decision to travel to Vanuatu?



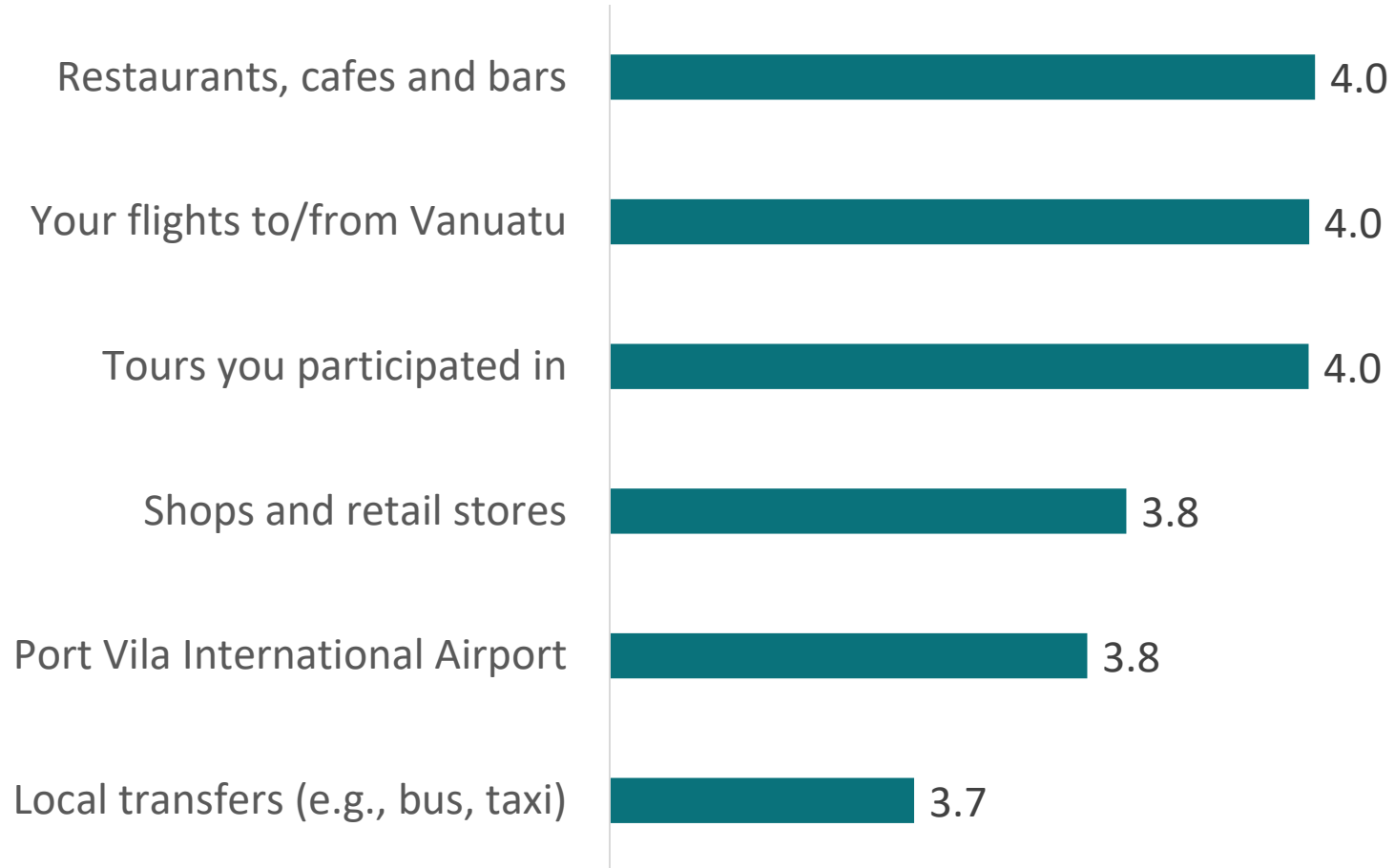
Scale: 1=Not important at all to 5=Very important

Q Satisfaction with COVID practices



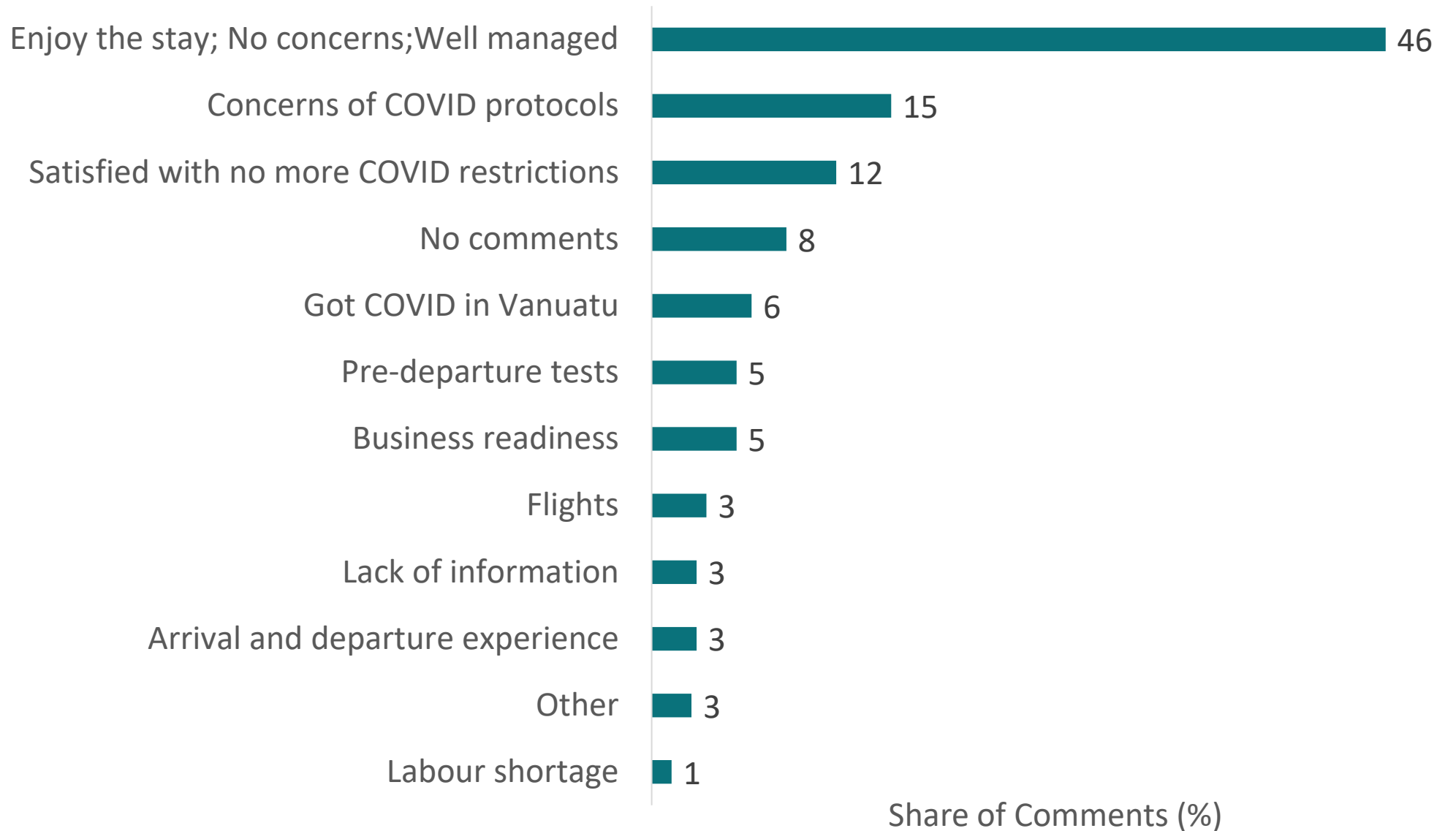
Scale: 1=Very dissatisfied to 5=Very satisfied

Q Satisfaction with Health and Safety Measures



Scale: 1=Very dissatisfied to 5=Very satisfied

COVID-related Comments



Note: Multiple responses, therefore total does not add up to 100%. Total number of comments N=319.

No Concerns with COVID



- + We were not concerned about COVID.
- + People were very respectful and maintained safe distances whilst remaining friendly.
- + Felt safe as there were not much covid cases around.
- + No concerns, a lot of people I know have chosen Vanuatu due to no vaccine restrictions.
- + Vanuatu seems to have everything under control, people walk around like they don't even know covid like they know their country is safe and well-versed with covid precautions.
- + It was as if covid-19 never happened. We saw little evidence of mask-wearing or any other concerns.
- + COVID was not an issue. Everyone was relaxed about it, there were no overbearing regulations in place.
- + COVID was never really on my mind when I was there. The biggest change I noticed was the nakamals only sell kava in plastic bottles now and don't serve it in bowls any more - which makes sense.

Concerns about COVID Protocols

- + Confusing messaging on mask wearing.
- + No one wearing masks on planes or at airport.
- + Lack of hand sanitiser or areas to wash hand.
- + I didn't feel like there was often soap in bathrooms or hand sanitiser already.
- + Nobody cares about Covid 19 in Vanuatu... The only thing you see is hand sanitizer in some spots.
- + The buses had no signage saying masks were recommended.
- + The locals held little raged or concerns around C19.
- + I feel locals were not taking restrictions and safety measures very seriously, especially given the amount of people they'd interact with on cruise ships etc.
- + Many people are still scared of having the Covid vaccines. There is a lot of false information disseminated by social media such as Facebook. Many people who have been vaccinated twice are not willing to get a booster. Many people are not being tested for Covid and therefore not reporting any illness.



15%

Share of
comments

Satisfied with Less COVID Restriction



12%
Share of
comments

- + Great to open the border to unvaccinated people.
- + Luckily day 2 days before our covid-19 regulations were relaxed.
- + Great that quarantine requirements were lifted and we could visit your wonderful country.
- + This is no longer relevant given the world has moved on.
- + I am over hearing about it and glad we can travel again. The lack of signage and masks in Vanuatu was a breath of fresh air.
- + ...was happy that there was no quarantine requirement and most shops had sanitizer in shops.
- + During our visit, covid-19 is not as seen as before as a sickness that is dangerous rather than seeing it as a common flu. So the concern is not that serious.

Business Readiness



12%
Share of
comments

- + Some of the local attractions were not open, or with very limited service.
- + Hotels and resorts plus cafes and restaurants need to improve their quality of food.
- + Sad to see the death of the reefs due to development. Hard to find good snorkeling from the shore now. Fresh food was hard to buy and expensive.
- + The fact that tourists were back and hotels/resorts hadn't prepared for it. Lots of stock/items not available, no hot water a two different places. Cleanliness was also lacking which was disappointing.
- + I think Vanuatu still needs time to adjust post-covid as the level of service standard is not consistent given the covid environment. Note only comparing to other countries I have visited Japan and Australia.
- + The resort we stayed at was kind of run down. Pool was dangerous to swim in through lack of cleaning and water maintenance. We also visited another resort that we have stayed at on a couple of occasions. Again very run down around pool area and overgrown lawns...
- + Because I visit frequently I knew what it had been like before COVID. It was a shame the local produce was extremely limited but understandable as the borders had just opened.
- + Meals and restaurant service were not up to their usual standard but once again the pandemic had an impact as new staff were still being trained.



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Thank you

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