

# VANUATU INTERNATIONAL VISITOR SURVEY

Visitor insights and pre-COVID benchmarking

Jan – Mar 2023



AUT



NEW ZEALAND  
FOREIGN AFFAIRS & TRADE  
MANATU AORERE

# Background

- IVS data from January to March 2023 is analysed to help us understand the visitor experience after the border reopening July 2022.
- **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.
- Key comparison analyses are carried out between this quarterly report and January-March 2020 IVS results to demonstrate post- and pre-COVID benchmarks and insight into tourism recovery in Vanuatu.
- 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](#)

## VISITATION OVERVIEW Q1 2020 vs. Q1 2023

# Jan-Mar 2020



### COUNTRY OF ORIGIN



# Jan-Mar 2023



### COUNTRY OF ORIGIN



5%

Visitors are 70 years old or over.



3 ppl

Avg. number of travel companions.



54%

Visitors visited for the first time.



\$75,524

Average household income.



4%▼

Visitors are 70 years old or over.



3 ppl

Avg. number of travel companions.



47%▼

Visitors visited for the first time.



\$86,859▲

Average household income.

# VISITATION OVERVIEW Q1 2020 vs. Q1 2023

## Jan-Mar 2020



### PURPOSE OF VISIT



4.3/5

Overall, visitors are very satisfied.



94%

Visitors are willing to recommend.



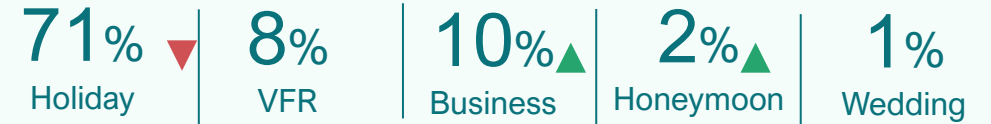
82%

Visitors are willing to return.

## Jan-Mar 2023



### PURPOSE OF VISIT



4.1/5 ▼

Overall, visitors are very satisfied.



90% ▼

Visitors are willing to recommend.



79% ▼

Visitors are willing to return.

# VISITATION OVERVIEW Q1 2020 vs. Q1 2023

## Jan-Mar 2020

 PREPAID EXPENDITURE

**\$1,176**

Prepaid per trip

 IN-COUNTRY SPEND

**\$90**

In-country spend per day

**62.5%**

Flowing into local economy rate



x **7.5** nights  
Average length of stay

**\$735**

Prepaid per trip

**\$674**

In-country spend per trip

 ECONOMIC IMPACT

**\$1,409** per trip

**\$188** per day

## Jan-Mar 2023

 PREPAID EXPENDITURE

**\$1,350** ▲

Prepaid per trip

 IN-COUNTRY SPEND

**\$101** ▲

In-country spend per day

**62.5%**

Flowing into local economy rate



x **8.8** nights ▲  
Average length of stay

**\$844** ▲

Prepaid per trip

**\$886** ▲

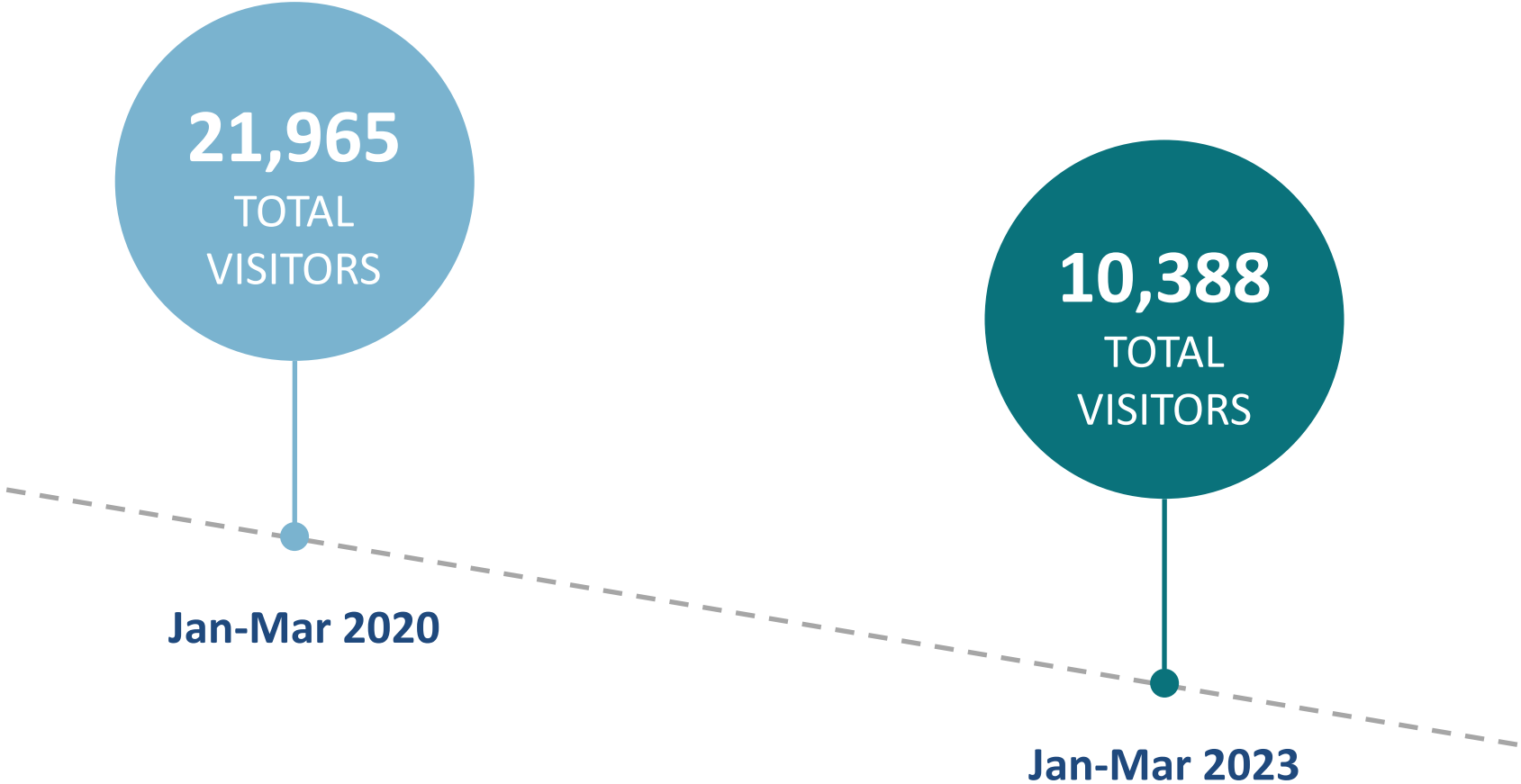
In-country spend per trip

 ECONOMIC IMPACT

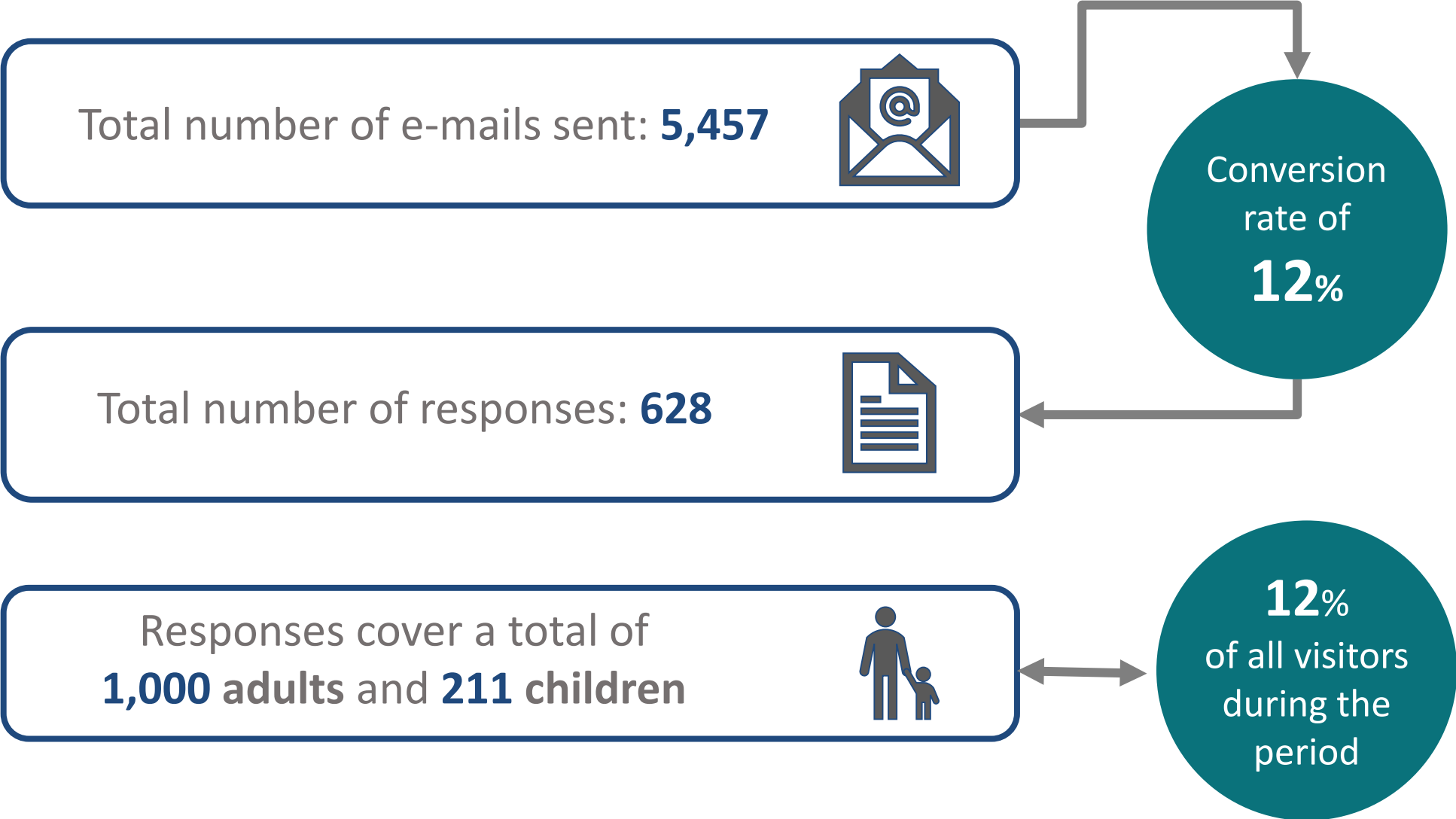
**\$1,730** per trip ▲

**\$197** per day ▲

# Total number of visitors



# Respondents (Jan-Mar 2023)



# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



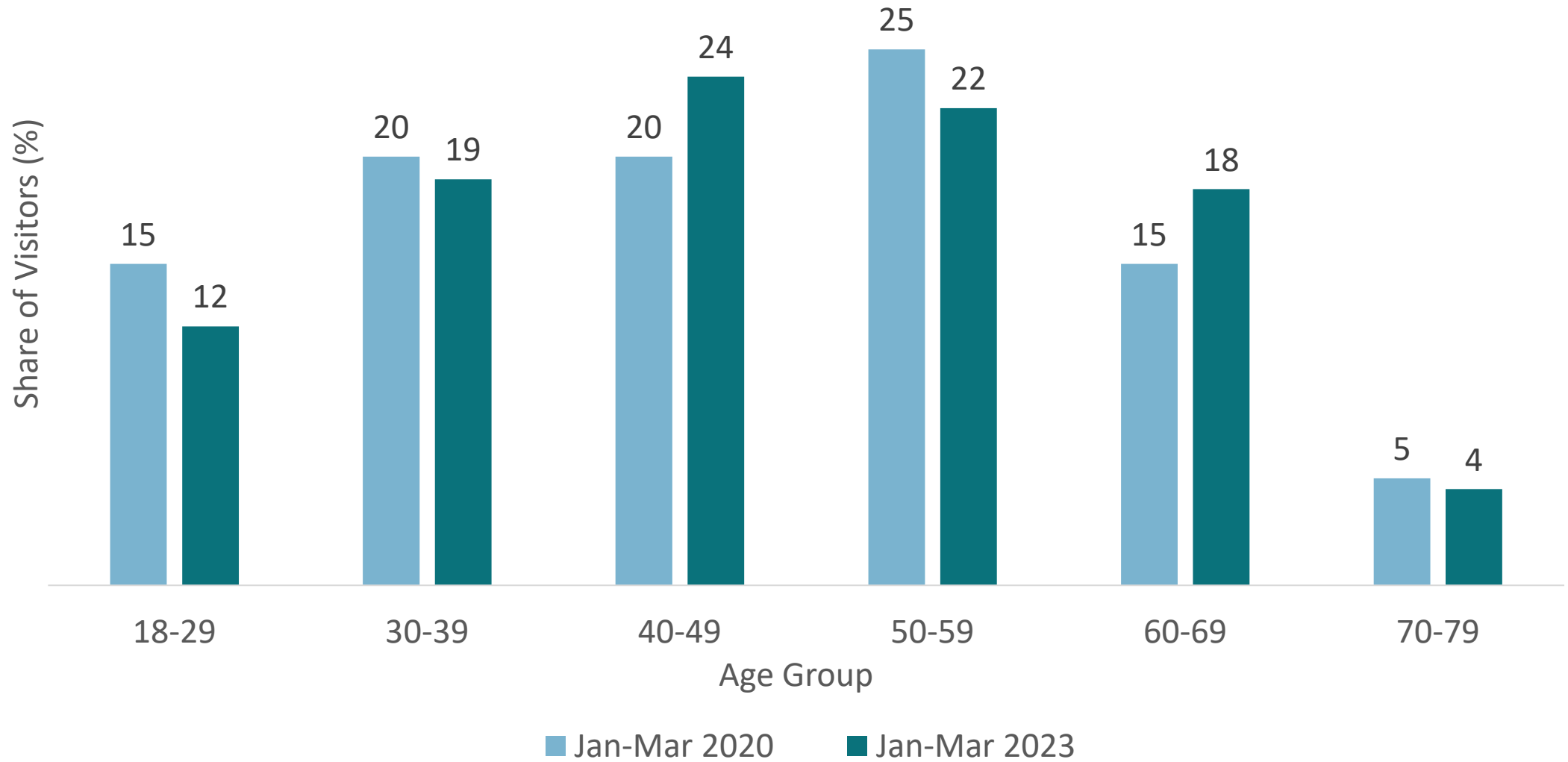
Visitor Spending  
and Impact



Visitor  
Satisfaction

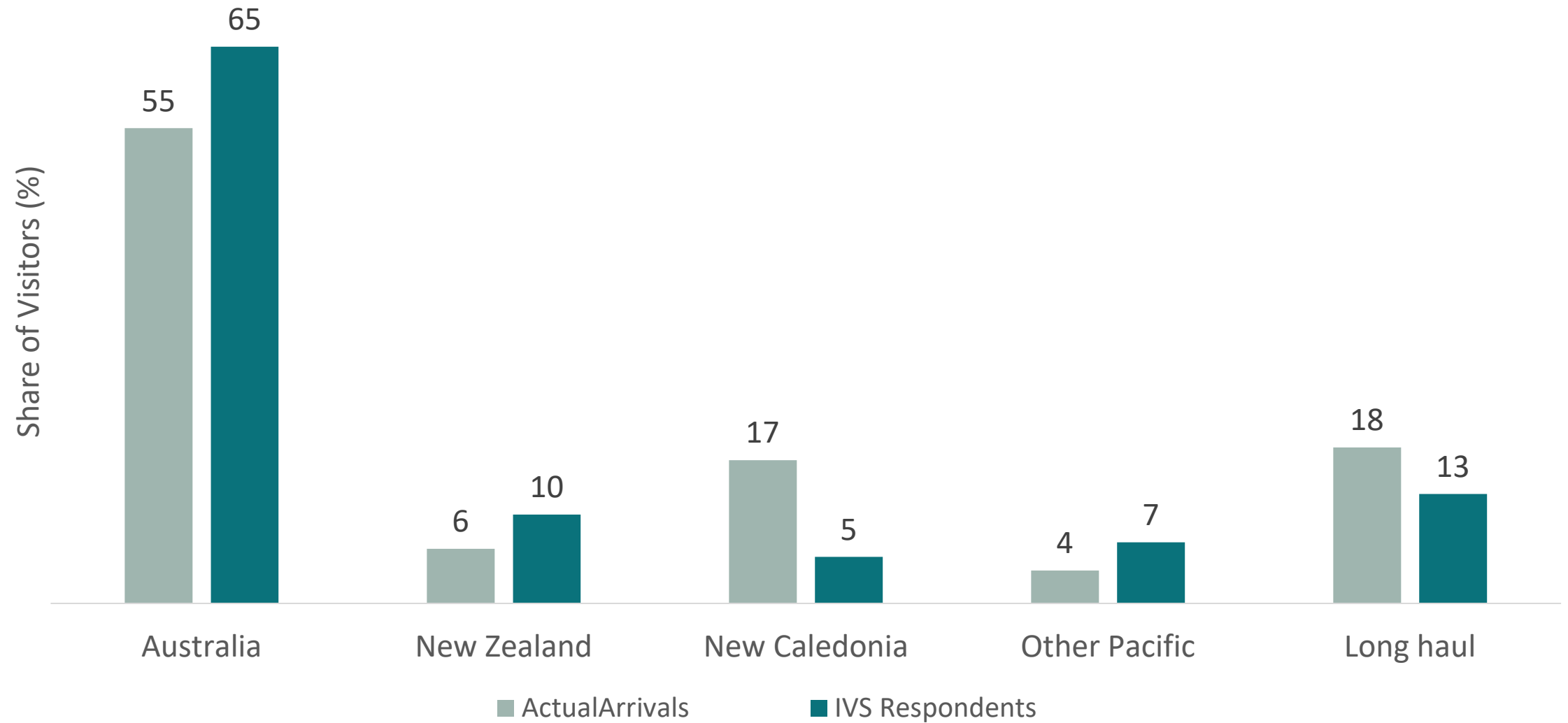


# Age profile



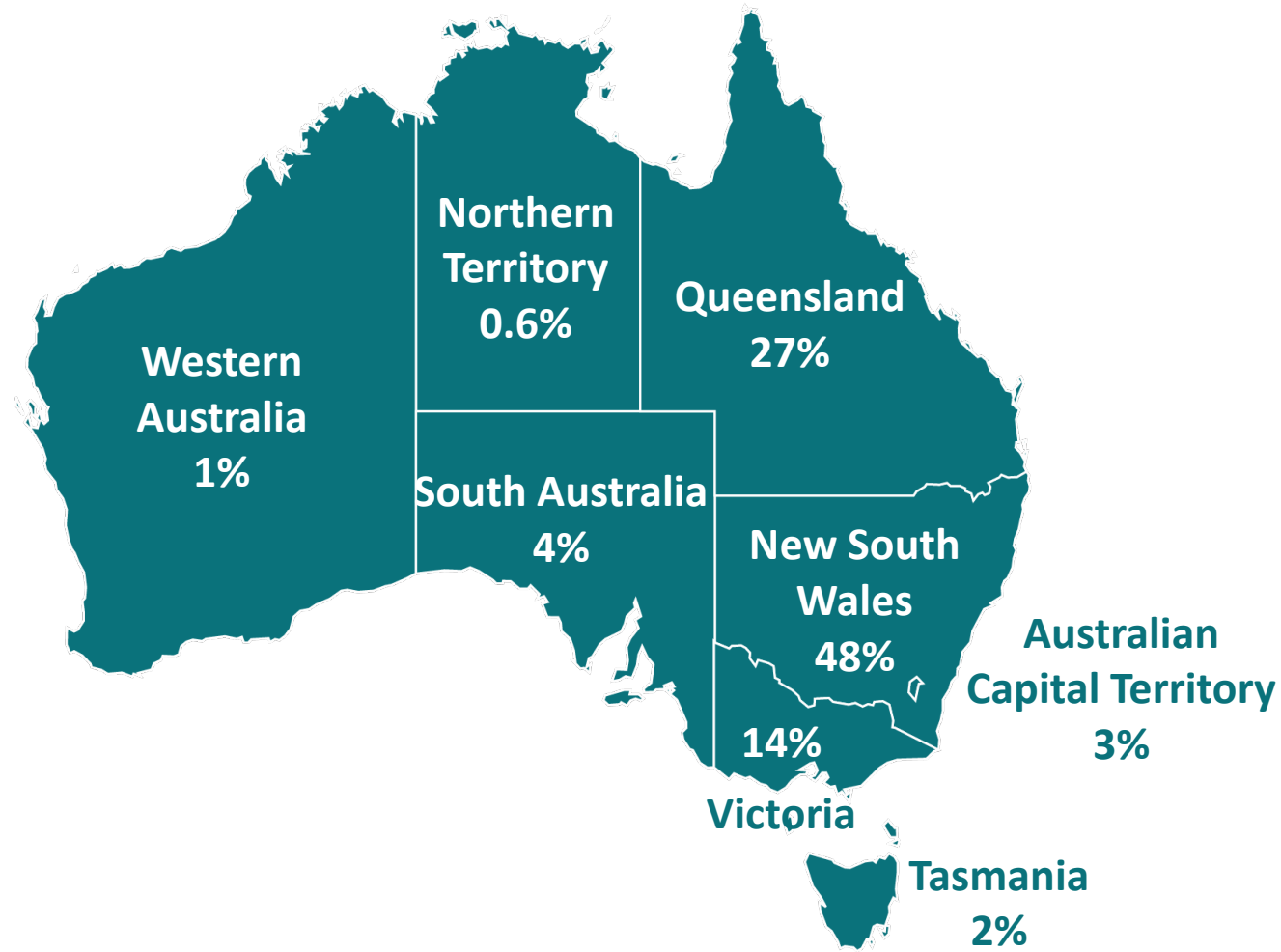
*Note: due to rounding, total does not sum to 100%*

# Country of residence



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

# Australian respondents - IVS respondent data Jan-Mar 2023

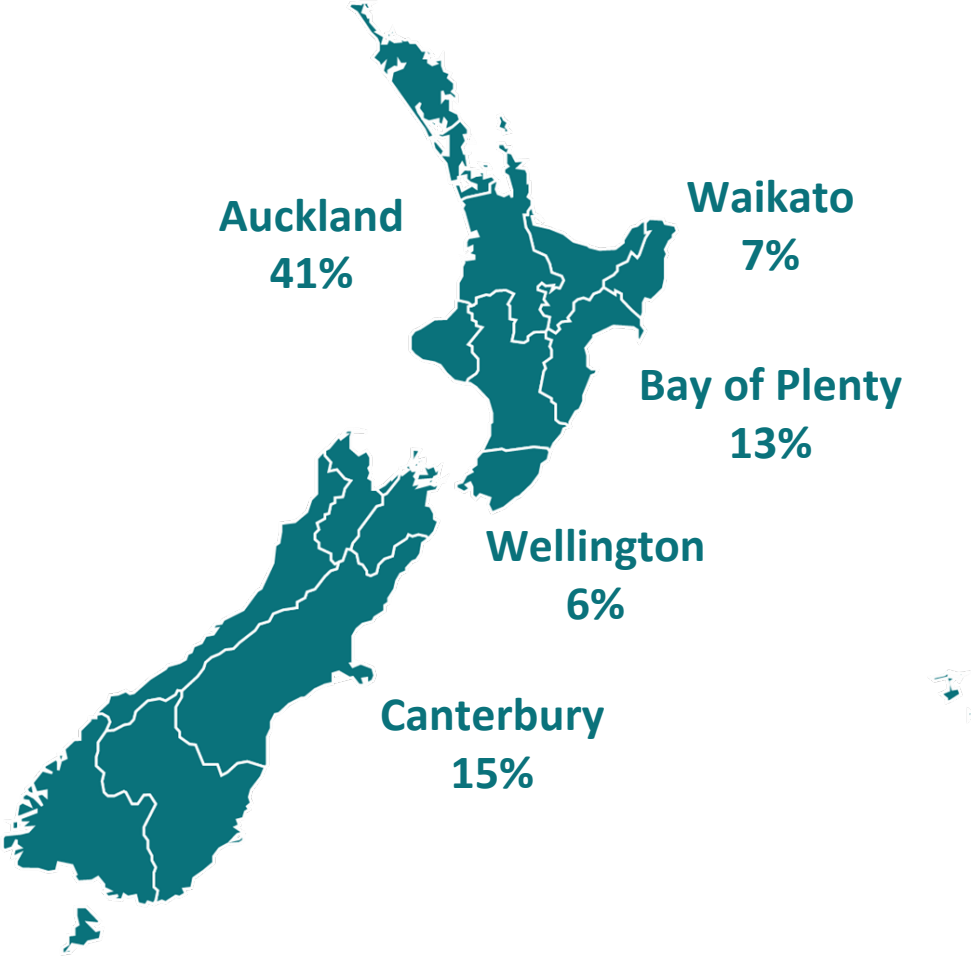


TOTAL  
**342**  
AU VISITORS

New South Wales, Queensland and Victoria make up **89%** of all Australian visitor arrivals

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

# New Zealand respondents - IVS respondent data Jan-Mar 2023

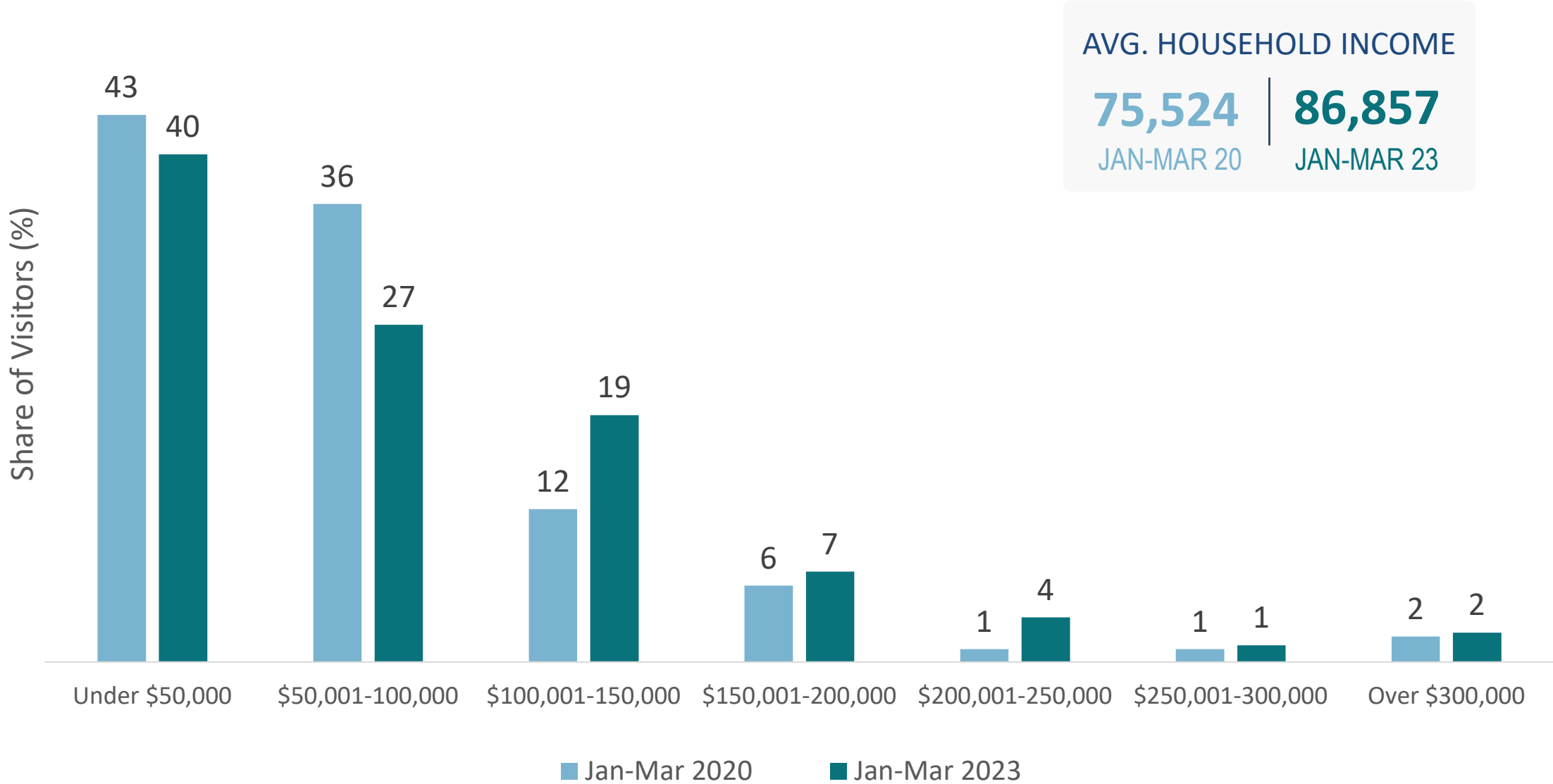


TOTAL  
**54**  
NZ VISITORS

Auckland, Waikato, Wellington, Canterbury, and Bay of Plenty make up **82%** of all New Zealand visitor arrivals

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

# Annual household income

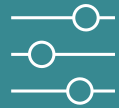


Note: due to rounding, total does not sum to 100%

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

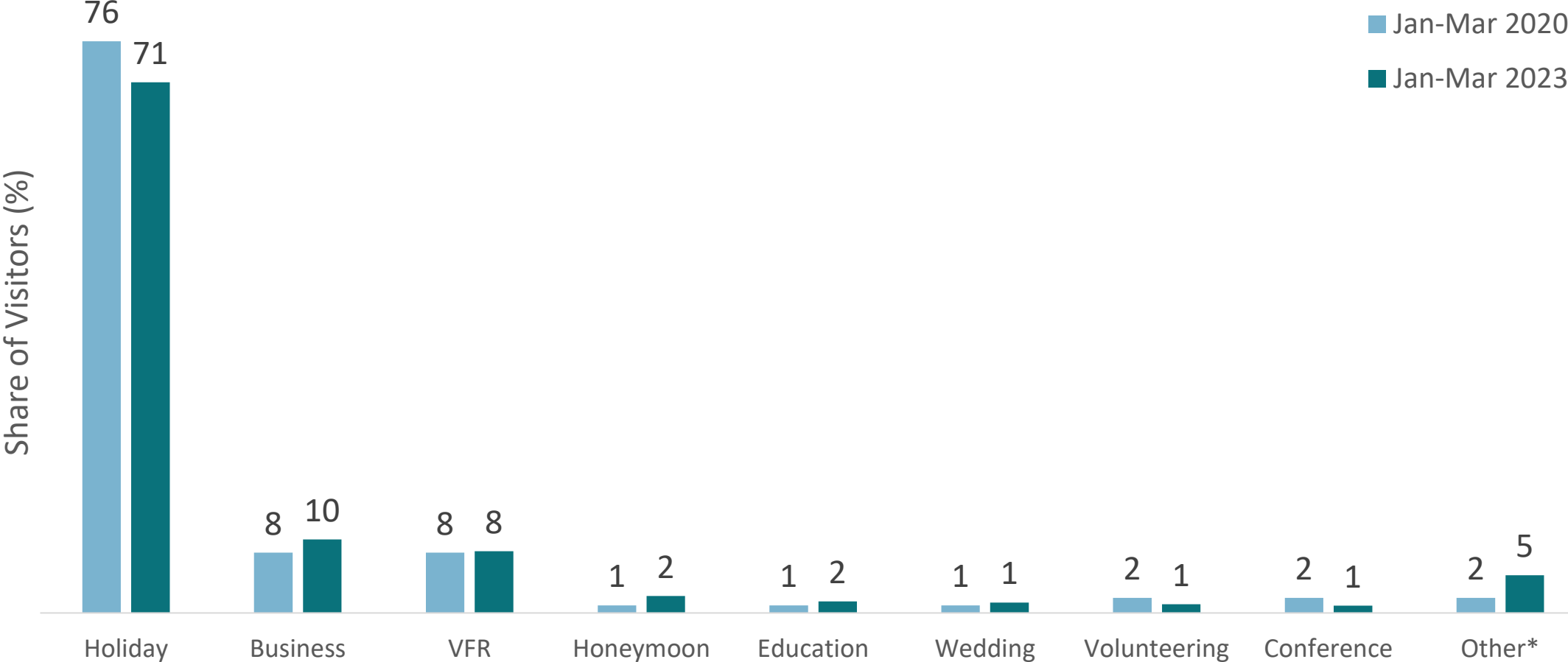


Visitor Spending  
and Impact



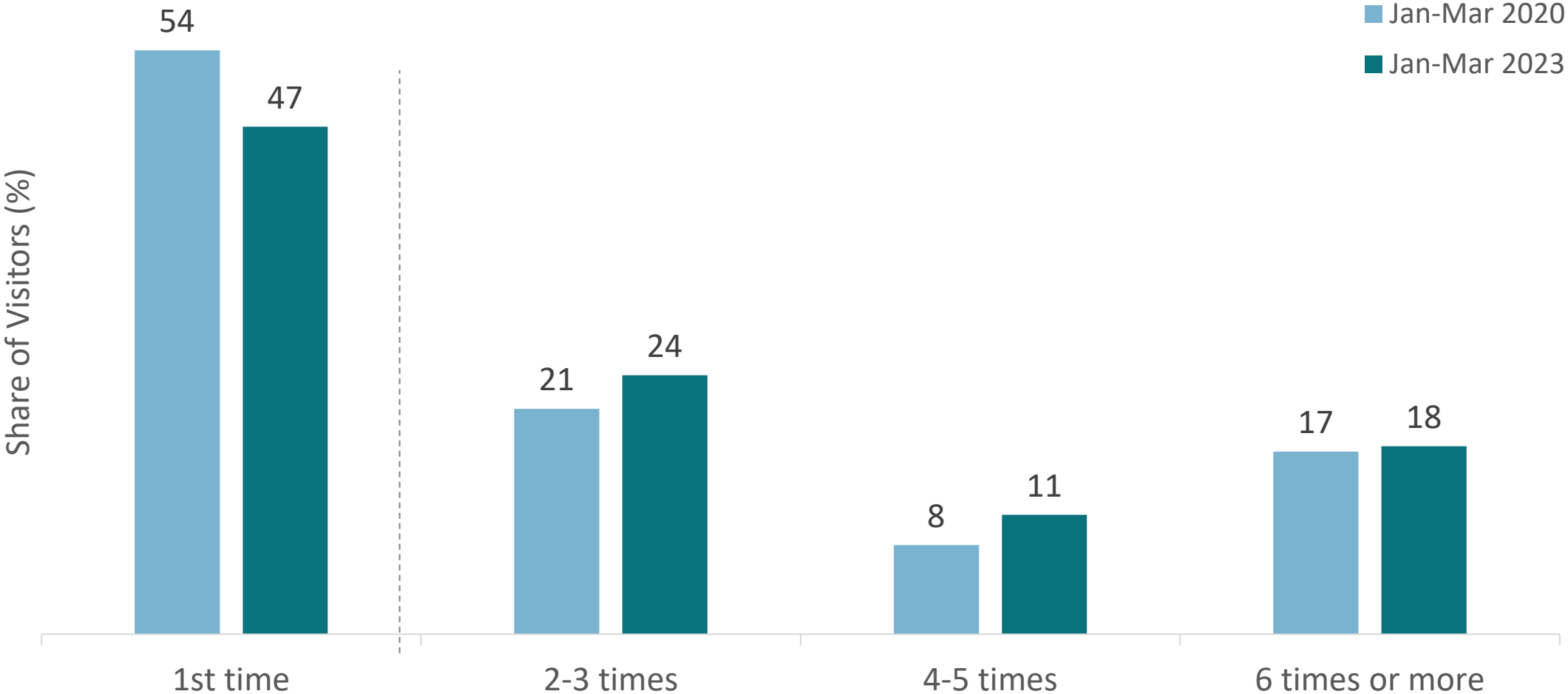
Visitor  
Satisfaction

# Purpose of visit



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

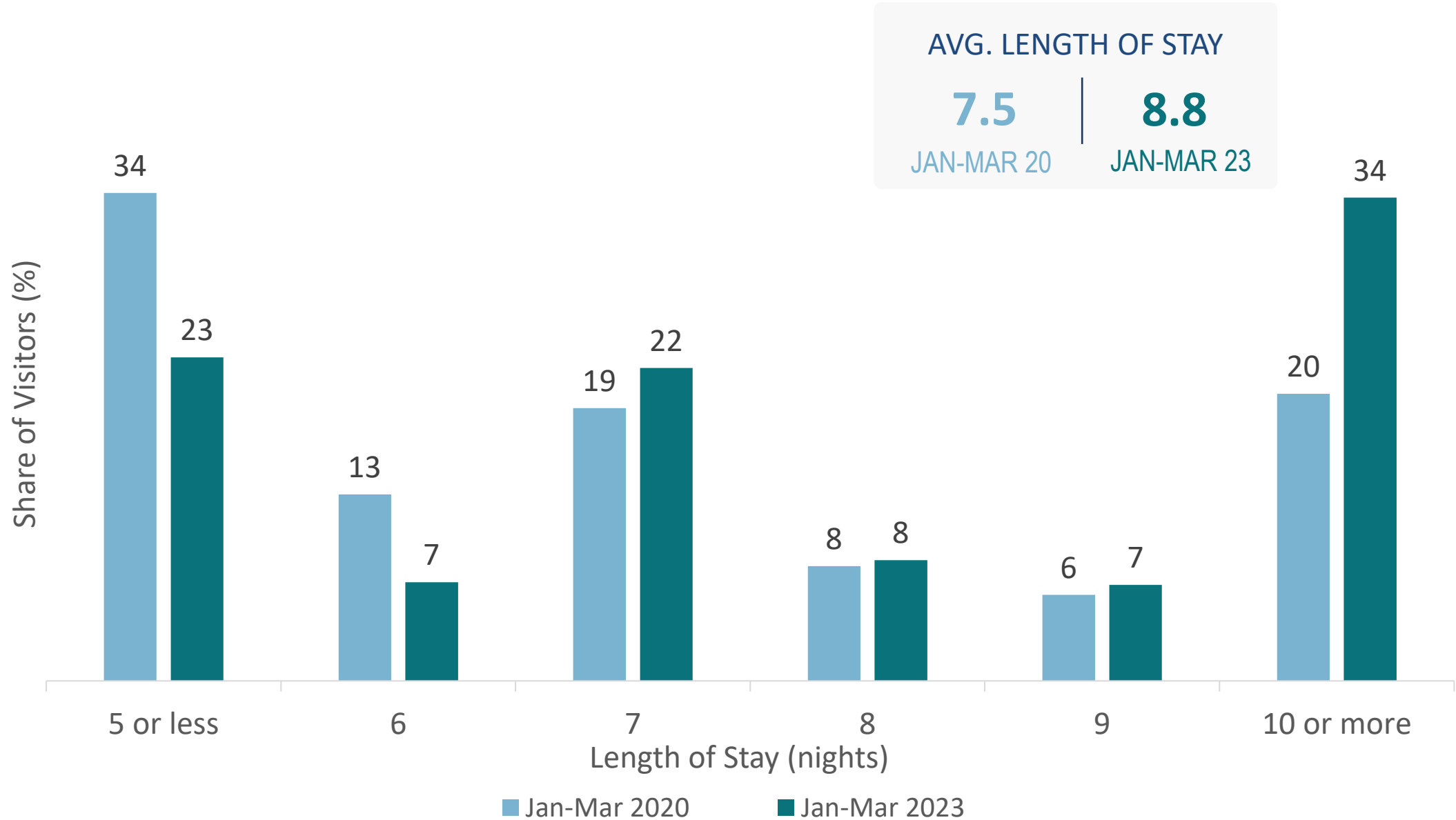
# Previous visits



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

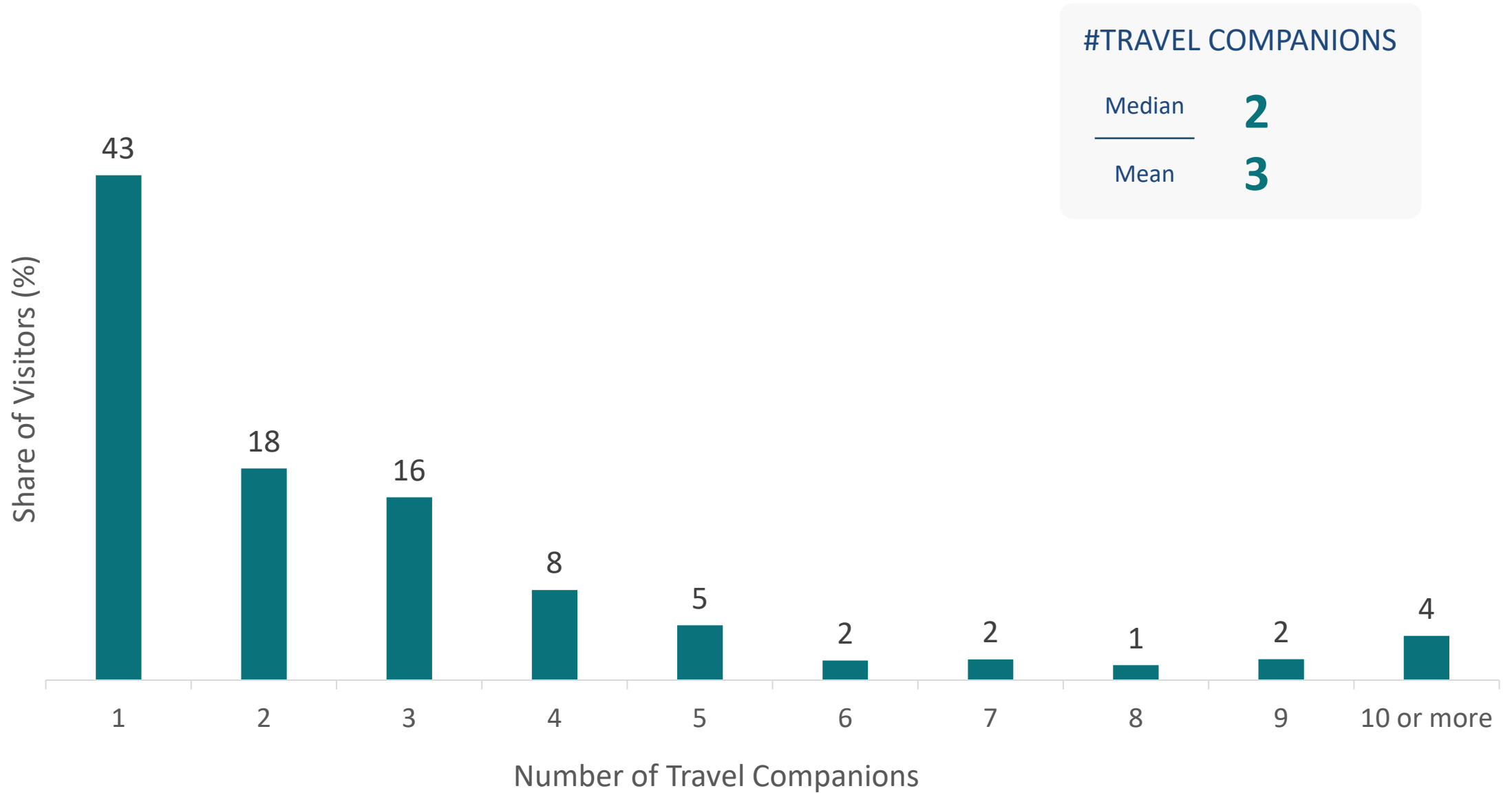


# Length of stay (nights)



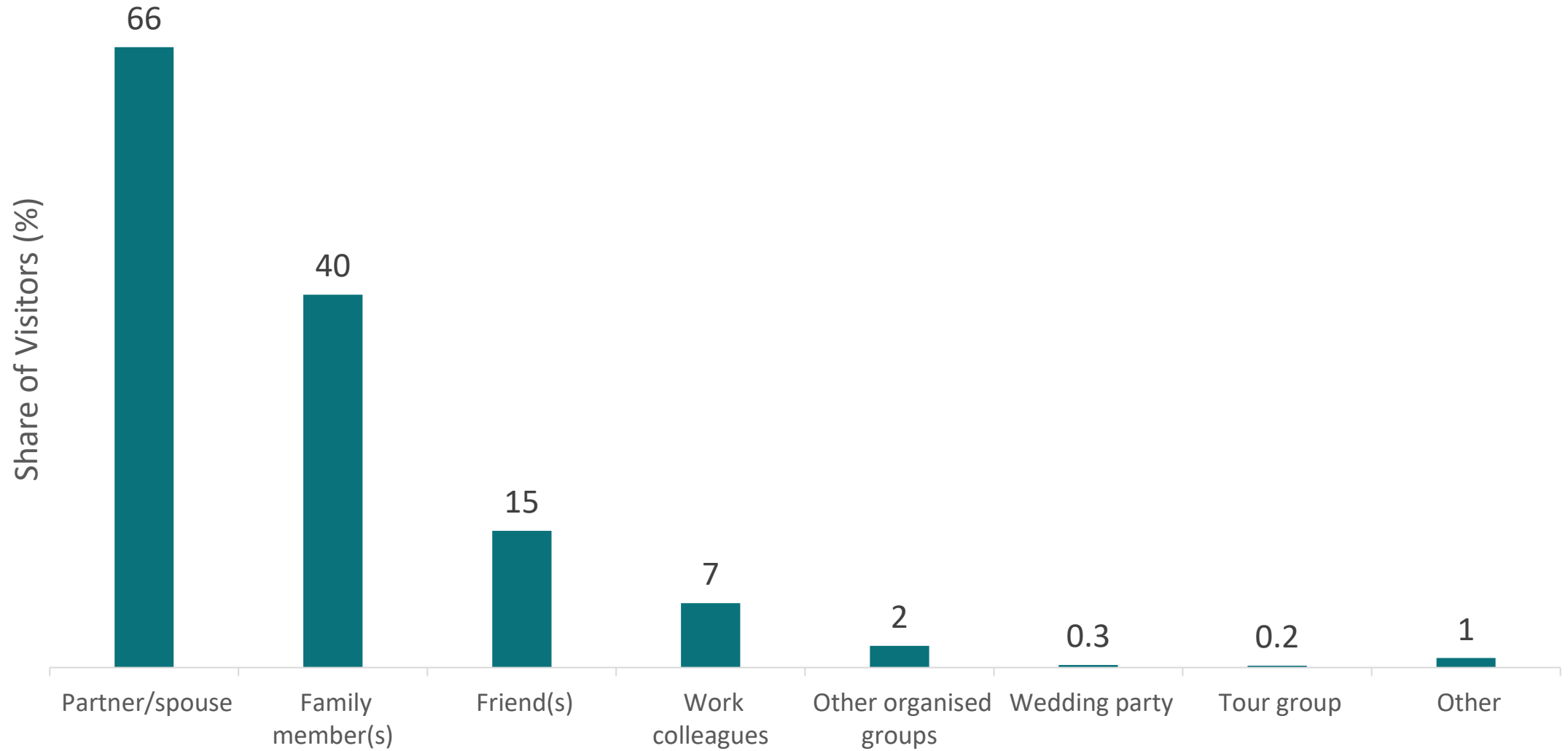
Note: 31 and 31+ days as outliers were removed for length of stay analysis

# Travel group



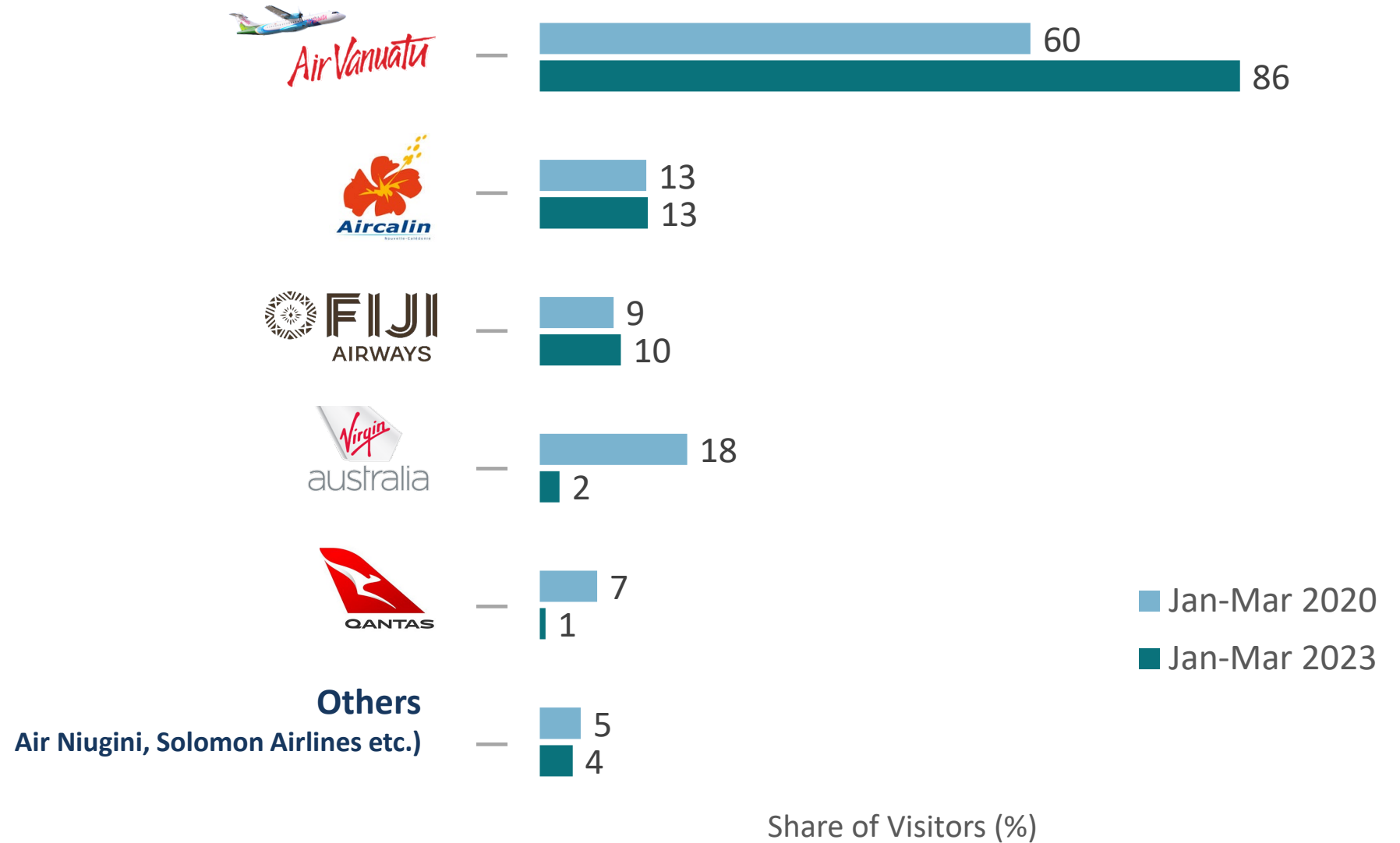
Note: due to rounding, total does not sum to 100%; Analysis based on visitors who travel with companions N = 399.

# Travel companions

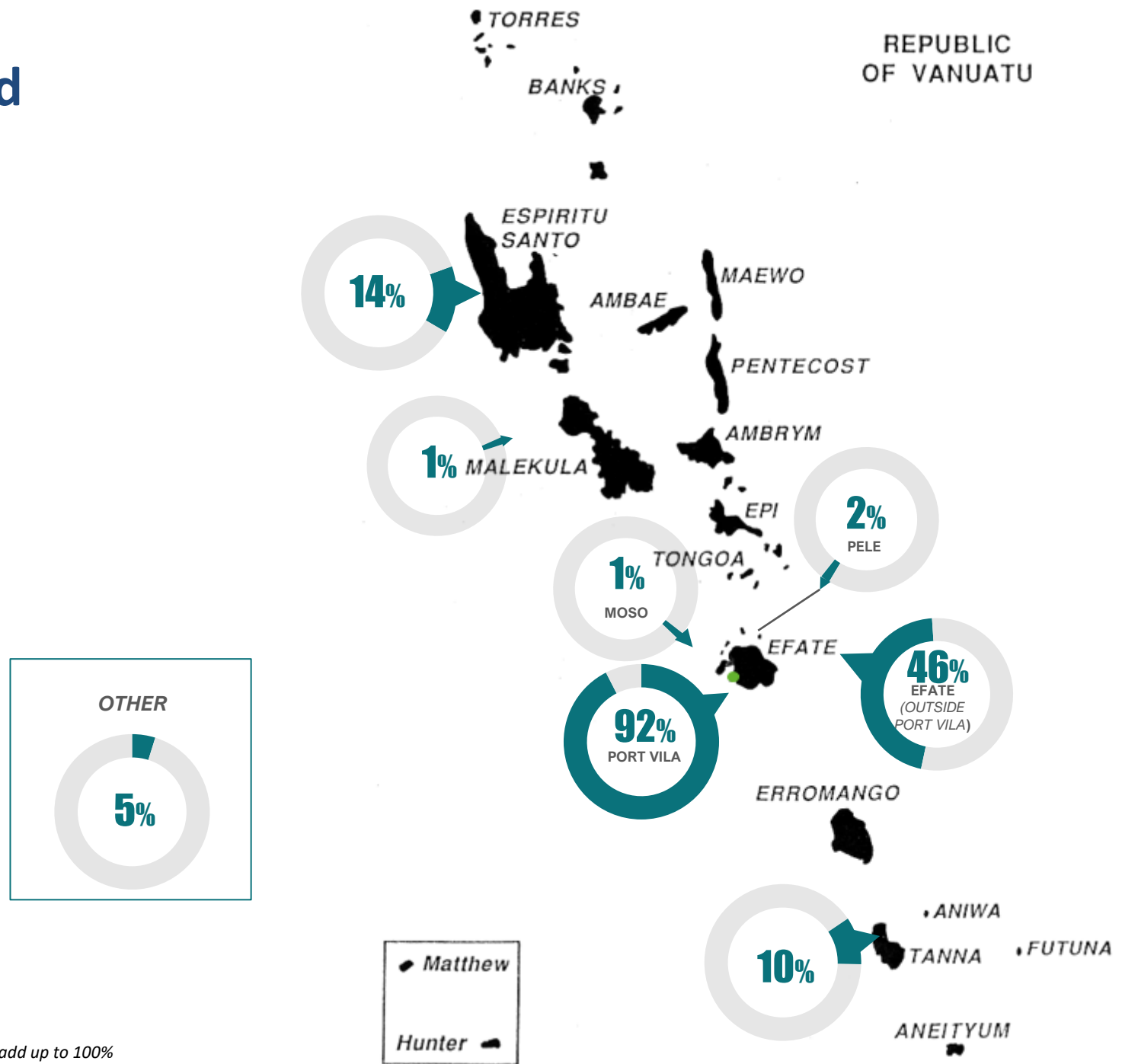


*Note: Multiple responses, therefore total does not add up to 100%.*

# Airlines used for travel

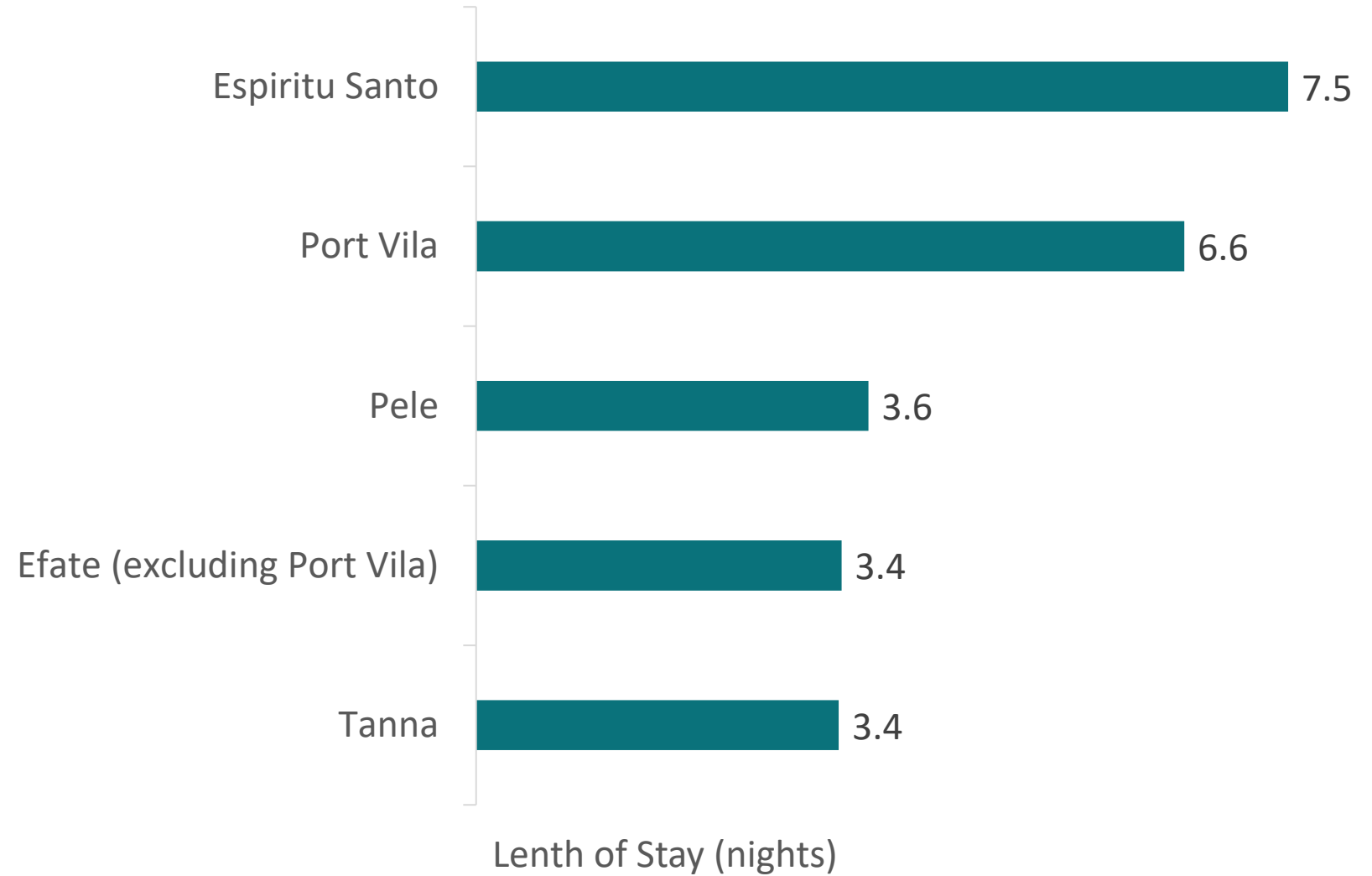


# Islands visited

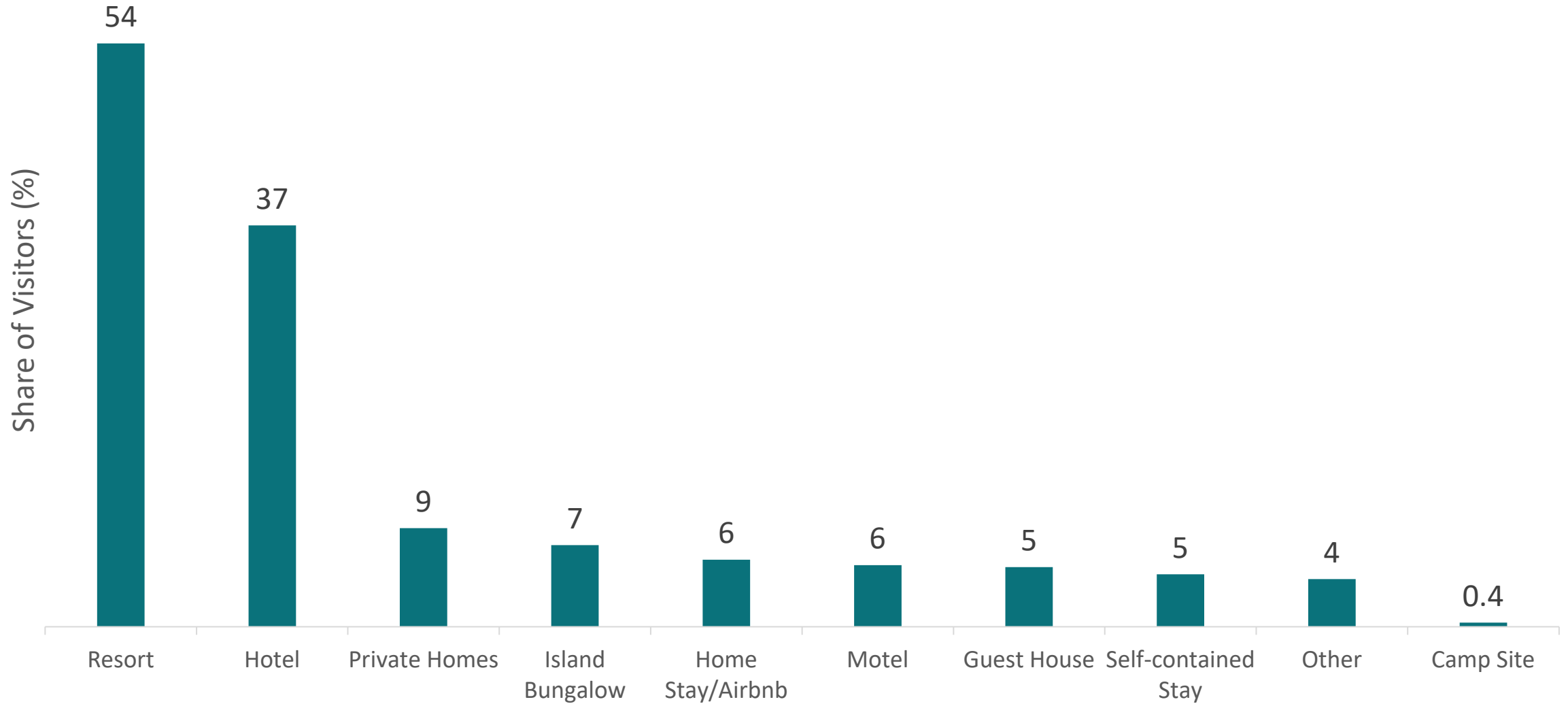


Note: Multiple responses, therefore total does not add up to 100%

# Average length of stay on islands



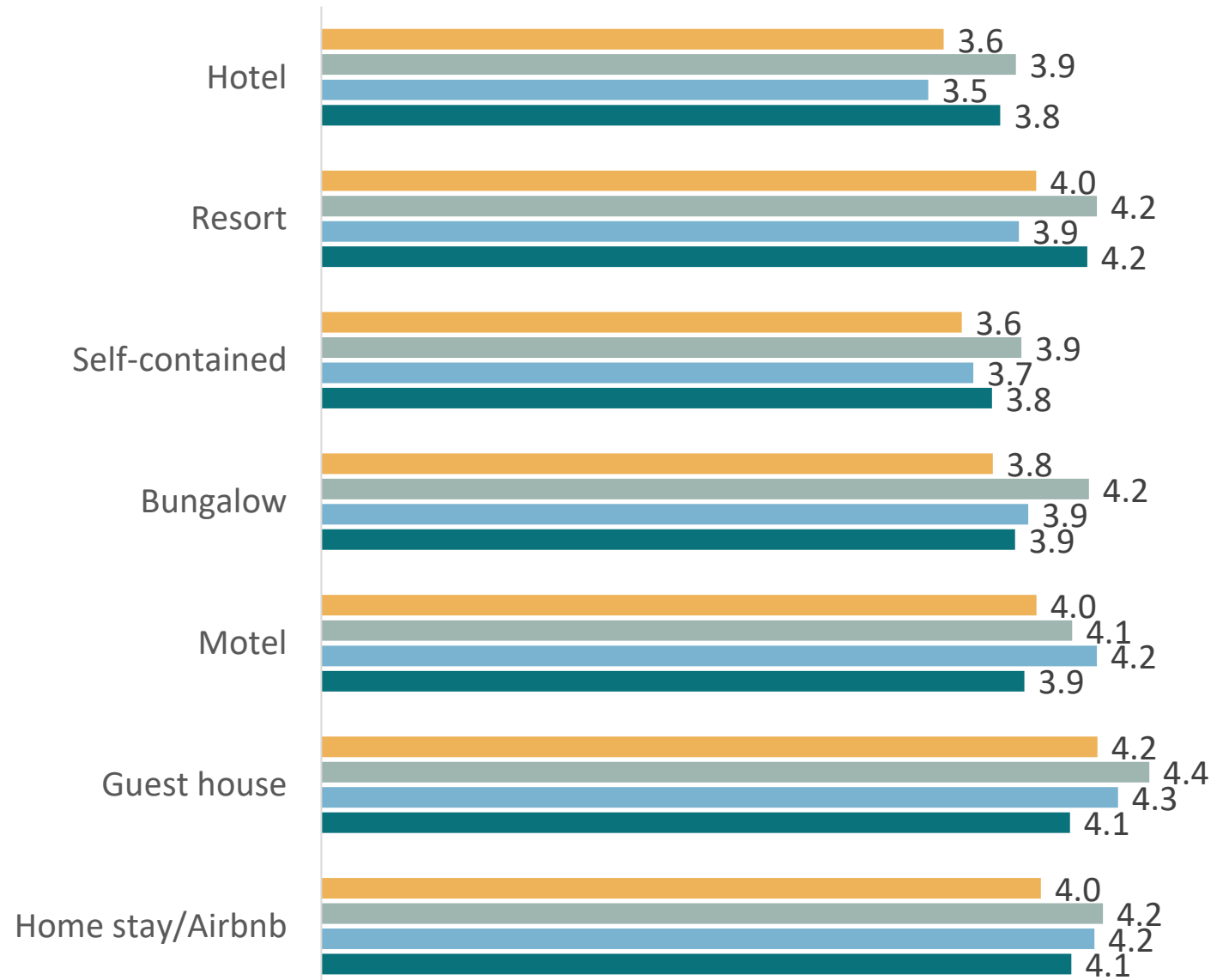
# Accommodations



*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

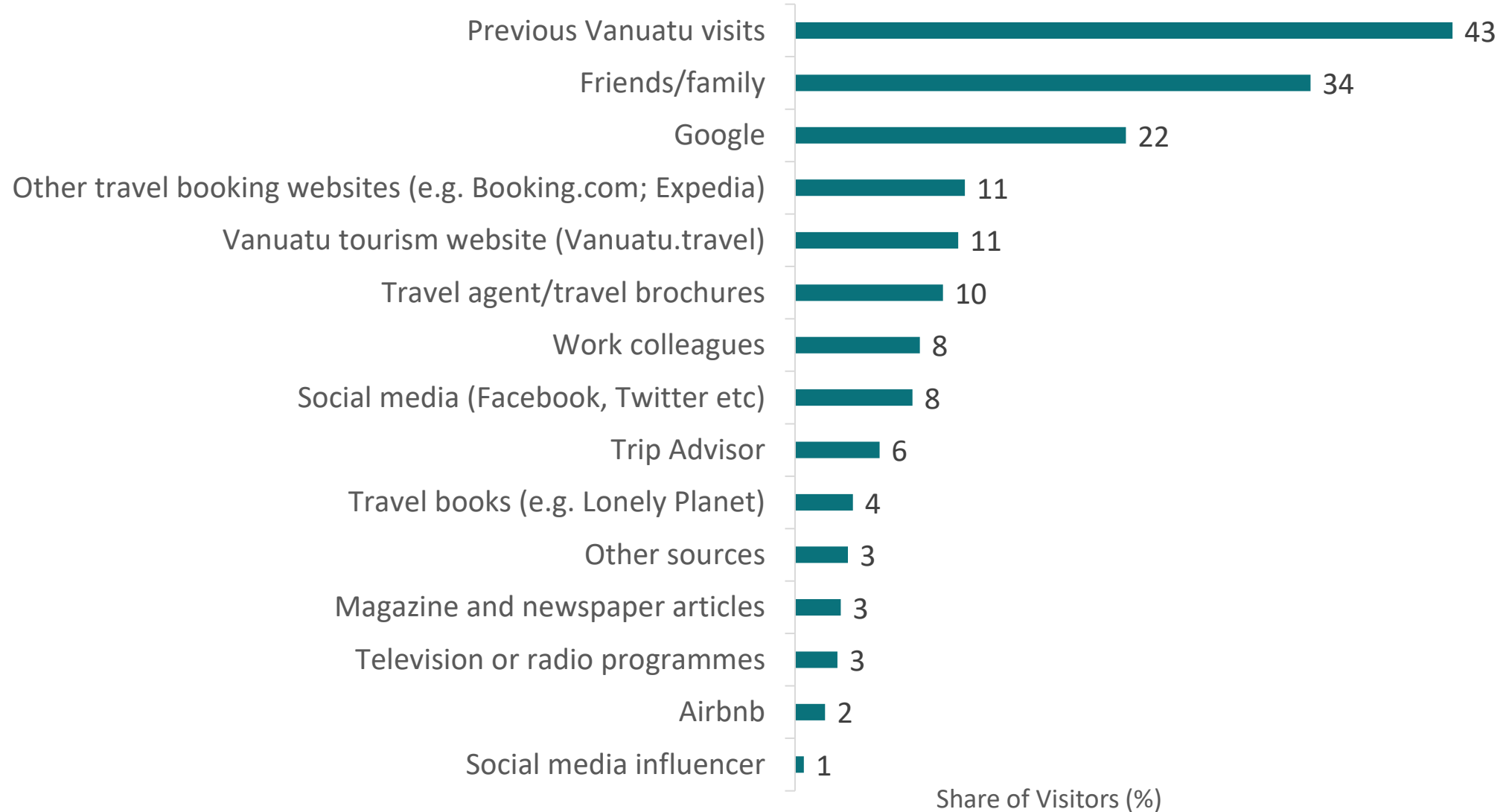


Visitor Spending  
and Impact

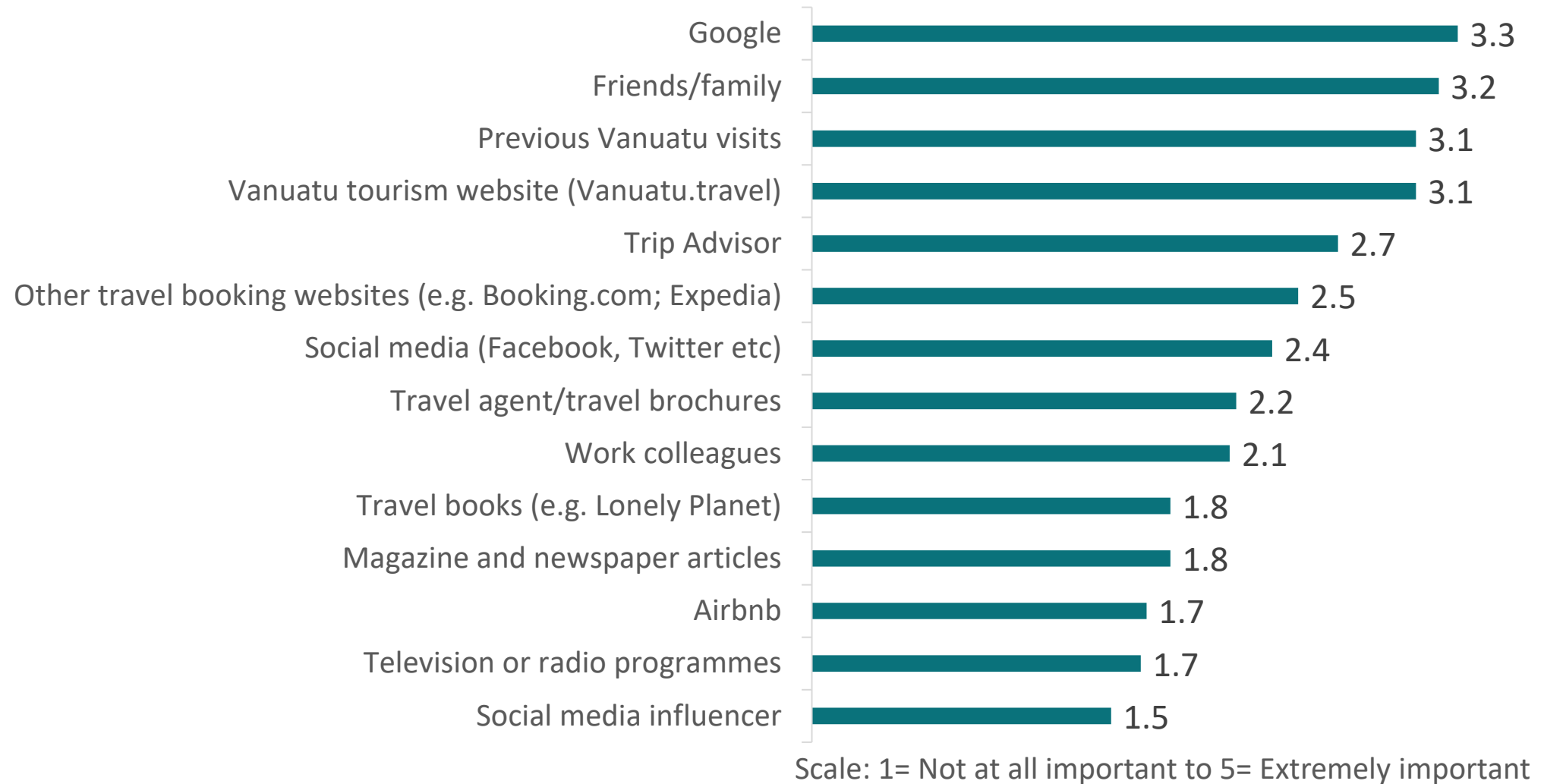


Visitor  
Satisfaction

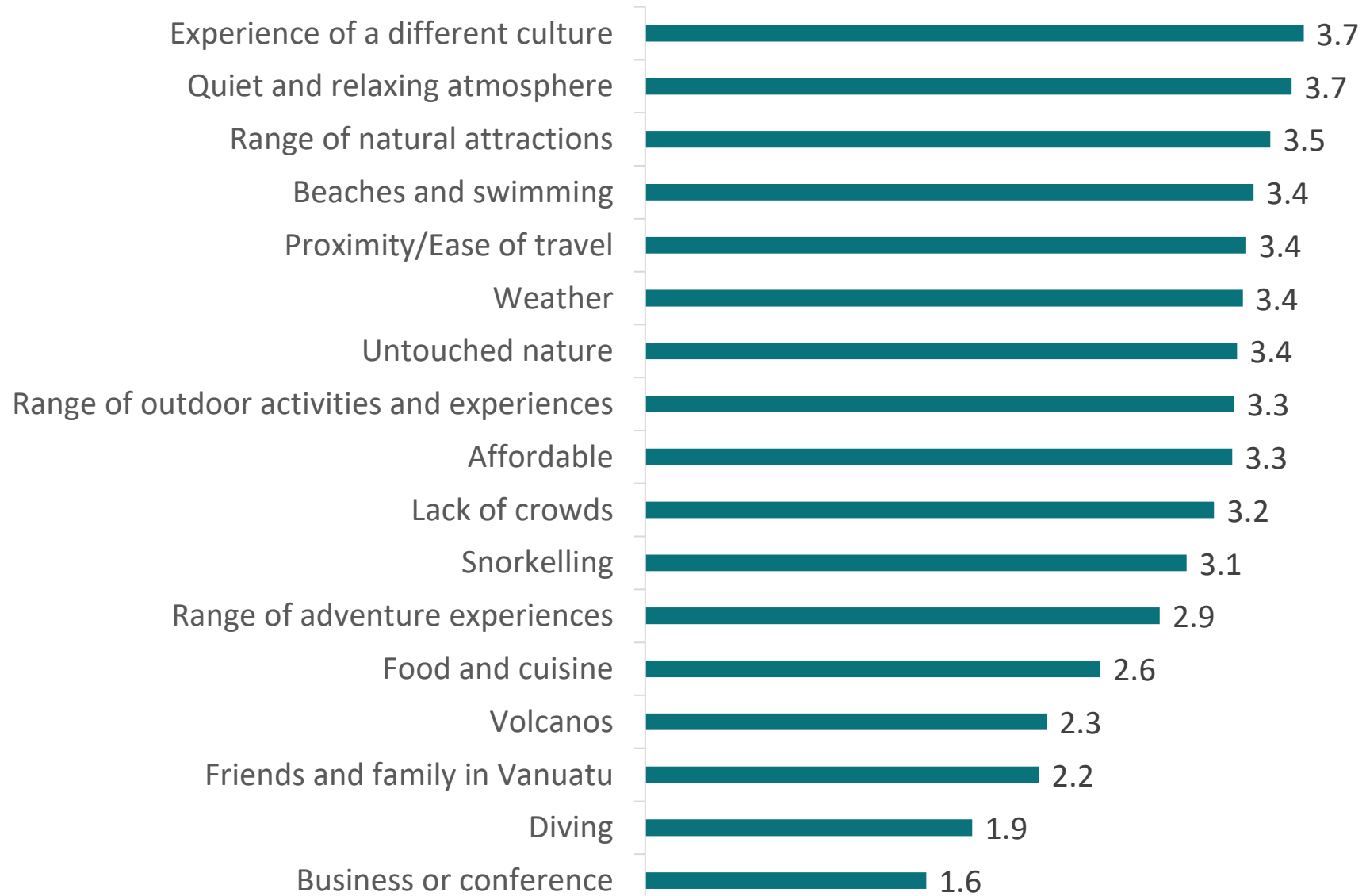
# Information source: How did you find out about Vanuatu as a destination?



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

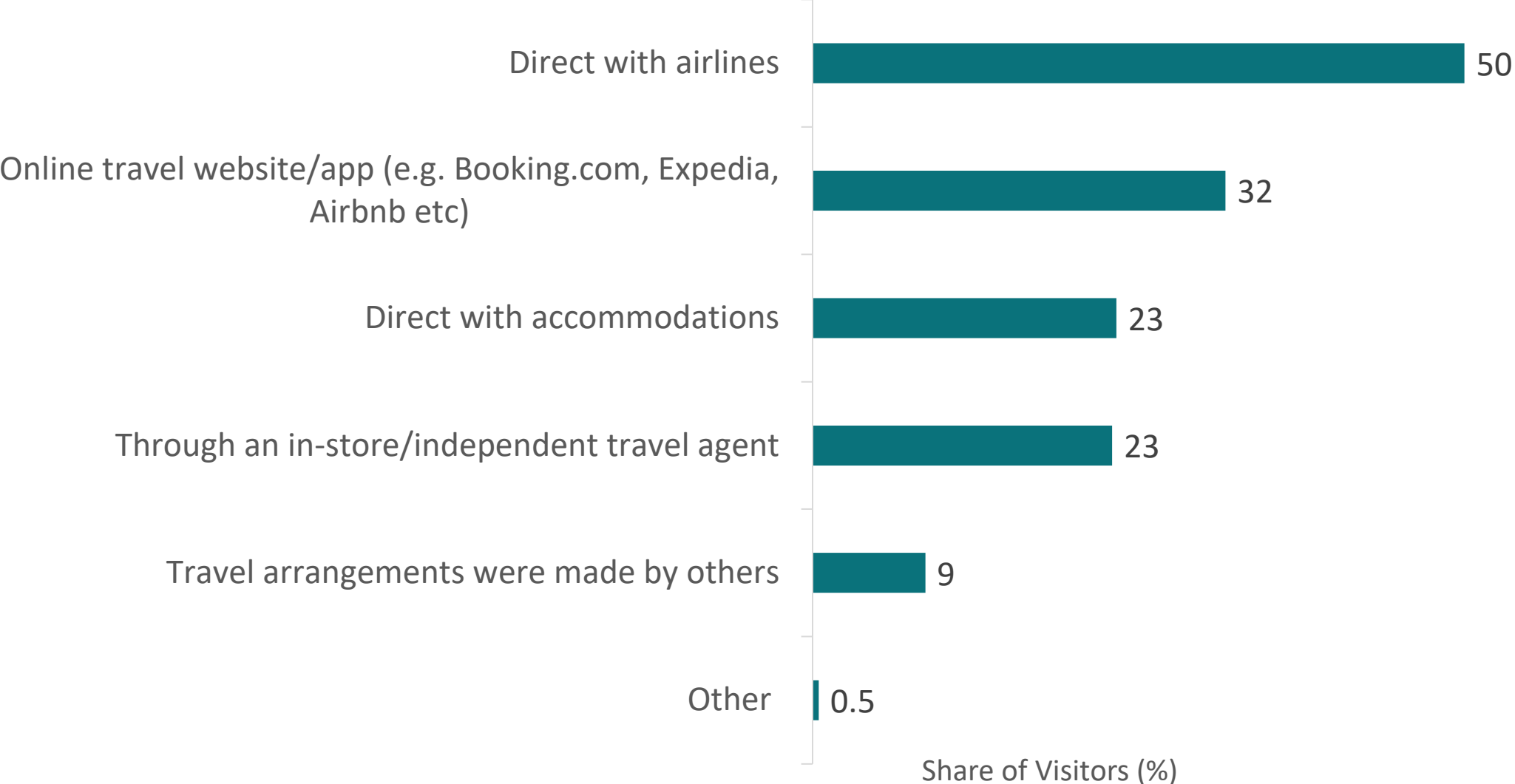


# Influential factors to travel to Vanuatu



Mean: 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

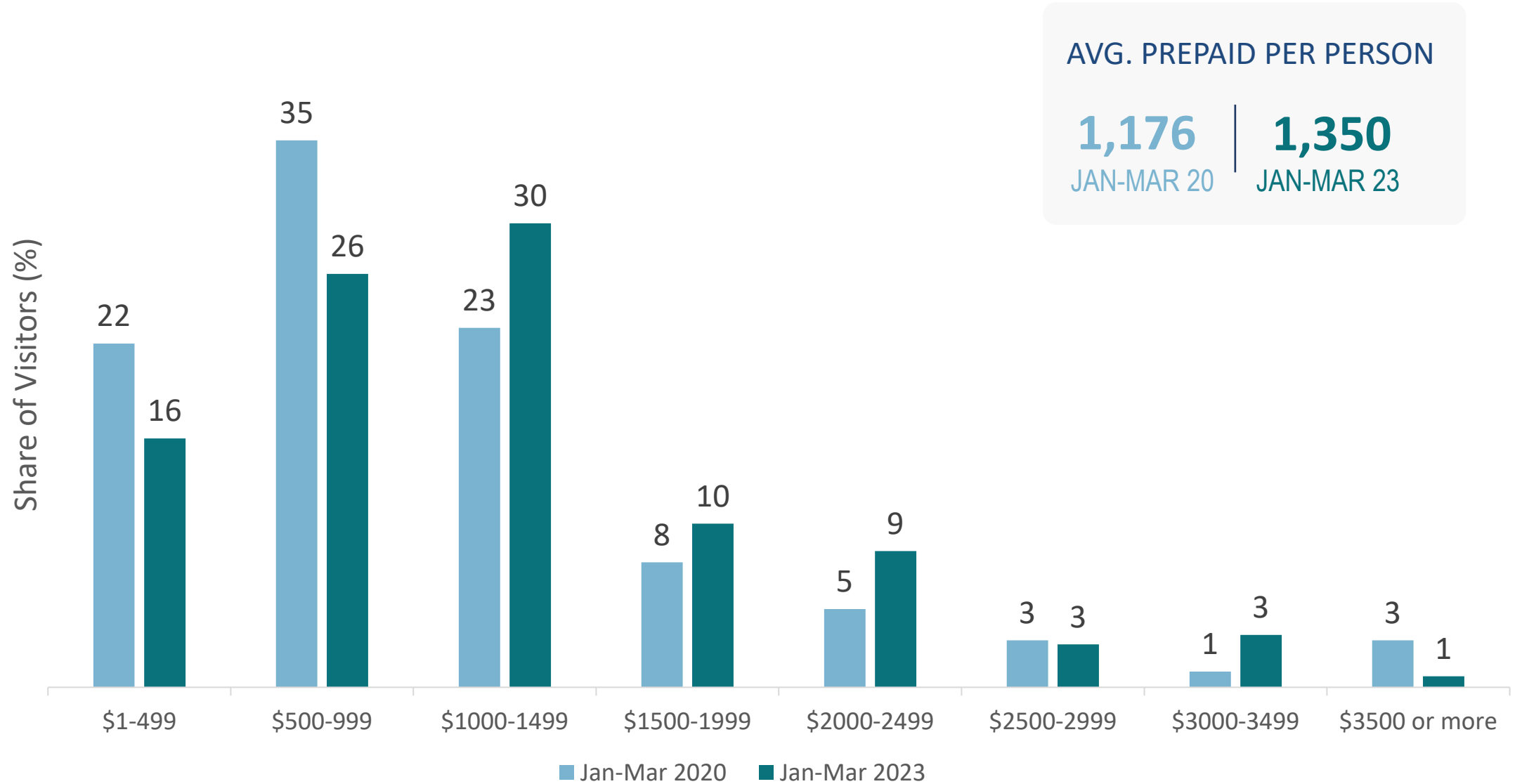


Visitor Spending  
and Impact



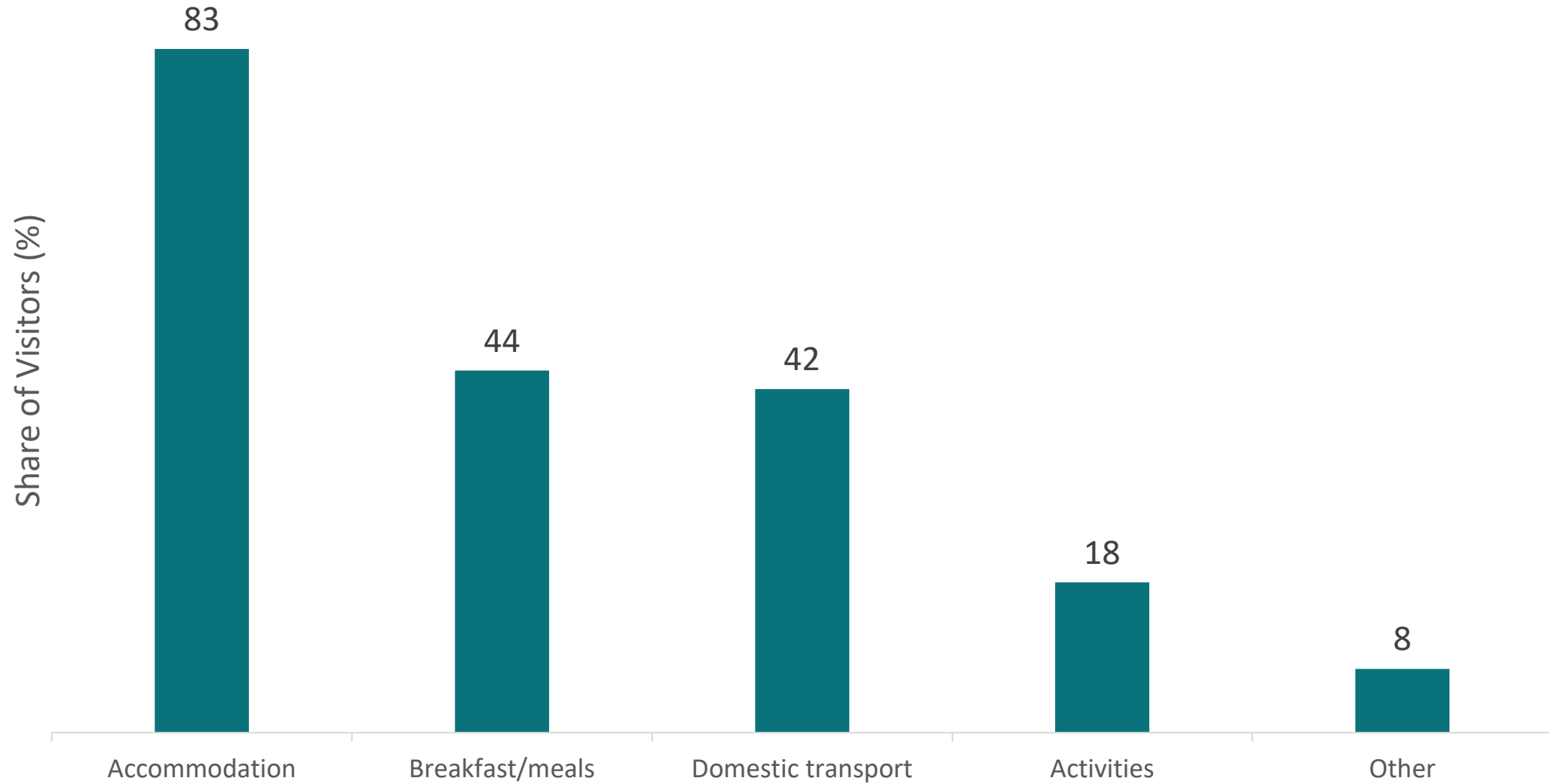
Visitor  
Satisfaction

# Prepaid expenditure



Note: In US dollars.

# Prepaid expenditure include





# In-country spend per person per day while in Vanuatu

	JAN-MAR 2020		JAN-MAR 2023	
	<u>% of sector</u>	<u>USD</u>	<u>% of sector</u>	<u>USD</u>
Accommodation	25	23	43	43 ▲
Food and Beverage	27	24	23	23
Domestic Travel	11	9	9	9
Retail	10	9	7	7
Tour	7	7	5	5
Local Transfer	7	6	5	5
Entertainment / Internet / Service	6	6	4	4
Souvenirs	4	3	2	2
Duty Free	3	3	2	2
<b>TOTAL</b>	<b>100%</b>	<b>\$90 10,294 VT</b>	<b>100%</b>	<b>\$101 11,492 VT</b>

Note: Average exchange rate VUV-USD for Jan-Mar 2020 and Jan-Mar 2023 are applied respectively.

# Economic impact – Per person and total

	JAN-MAR 2020		JAN-MAR 2023	
	USD	VUV	USD	VUV
<b>Average Spend Prior to Arrival</b>				
Per Person Per Trip	1,176	134,219	1350	154,054
<i>Flowing into local economy rate – estimated</i>	62.5%		62.5%	
Per Person Per Trip	735	83,887	844	96,284
Per Person per Day	98	11,230	96	10,941
<b>Average Local Spend</b>				
<i>Length of Study (nights) - mean</i>	7.5 nights		8.8 nights	
Per Person Per Trip	674	76,898	886	101,126
Per Person per Day	90	10,294	101	11,492
<b>Total Economic Impact-Per Trip</b>	<b>1,409</b>	<b>160,785</b>	<b>1,730</b>	<b>197,410</b>
<b>Total Economic Impact-Per Day</b>	<b>188</b>	<b>21,524</b>	<b>197</b>	<b>22,433</b>

Note: Average exchange rate VUV-USD for Jan-Mar 2020 and Jan-Mar 2023 are applied respectively.

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
and Impact



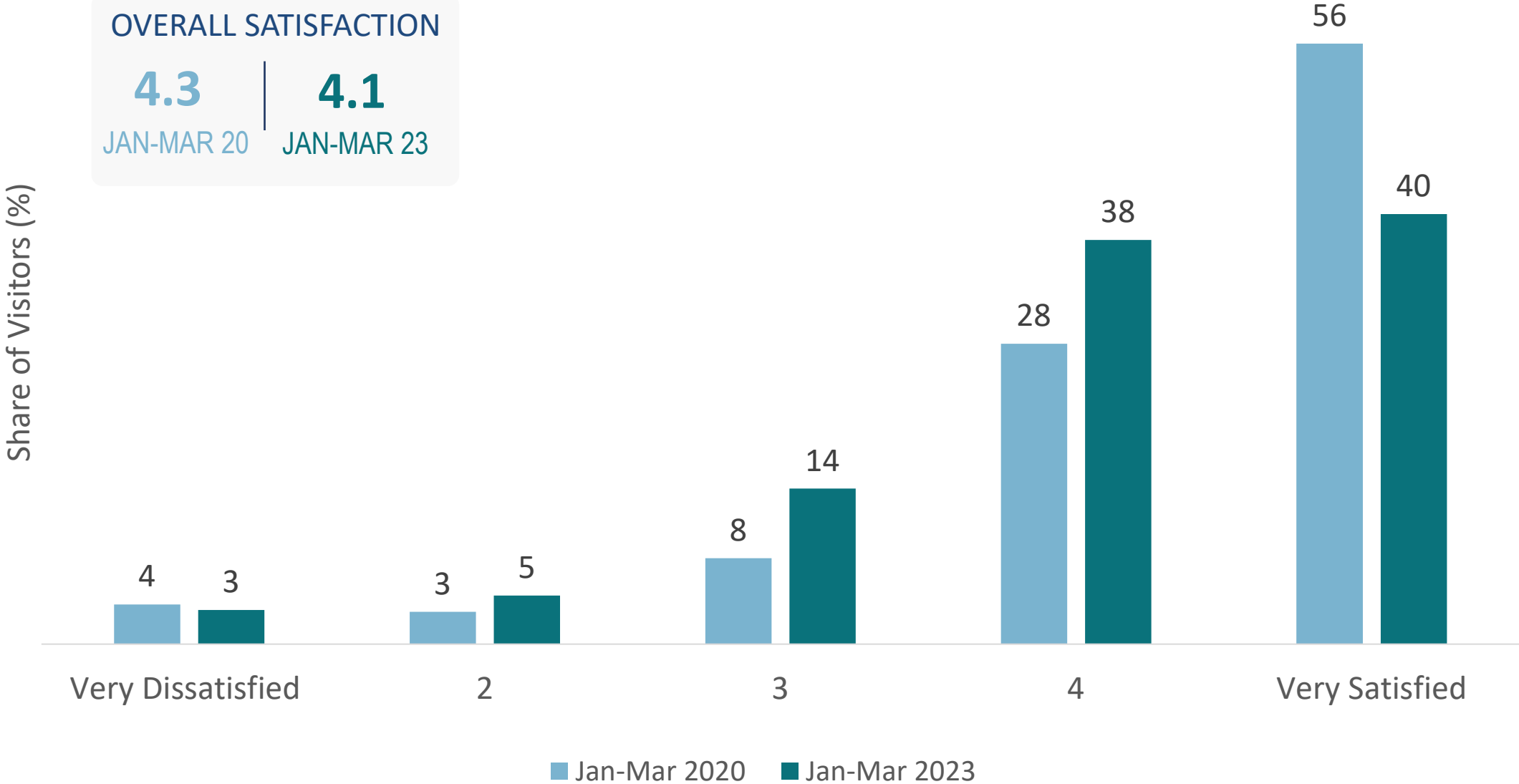
Visitor  
Satisfaction

# Visitor overall satisfaction

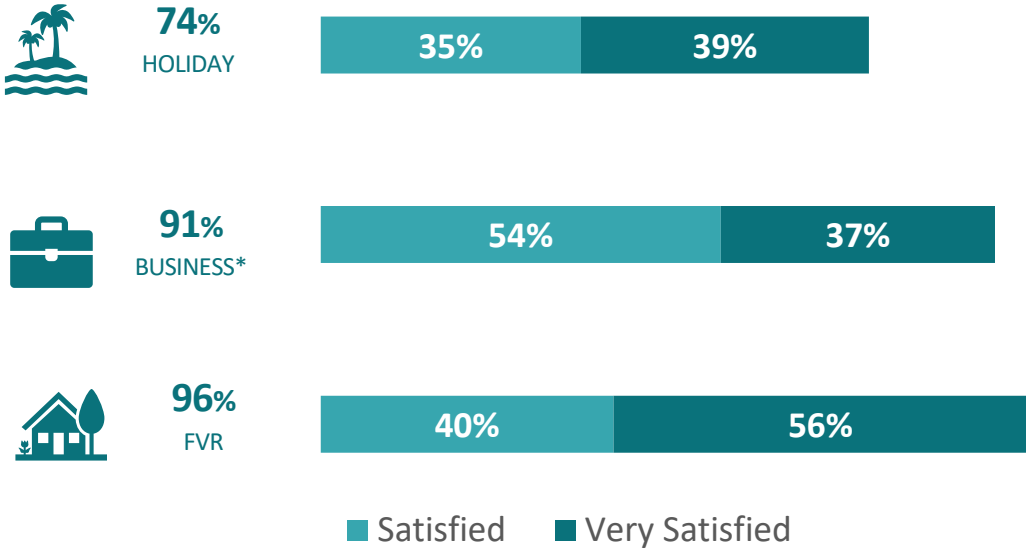
OVERALL SATISFACTION

**4.3**  
JAN-MAR 20

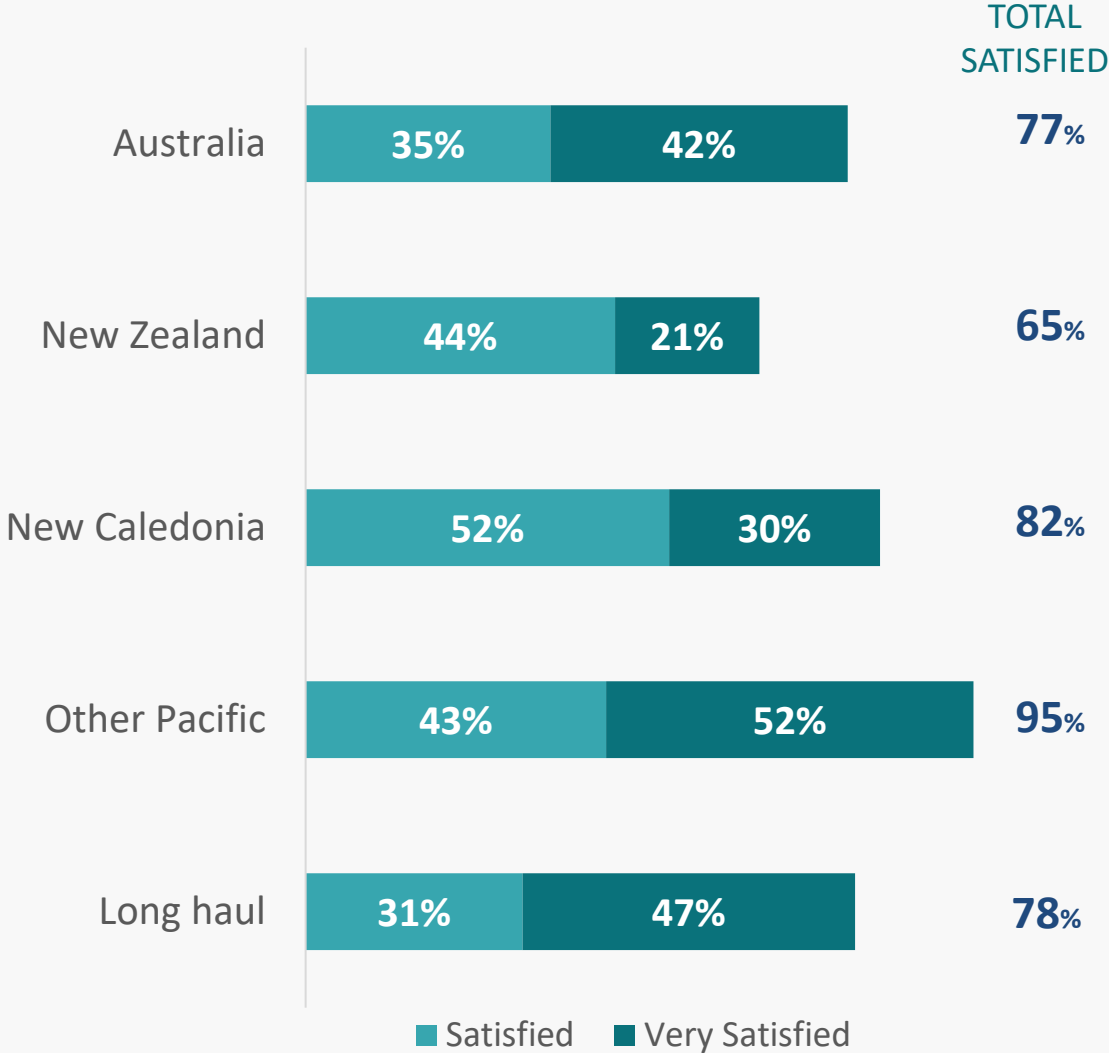
**4.1**  
JAN-MAR 23



# Overall satisfaction breakdown

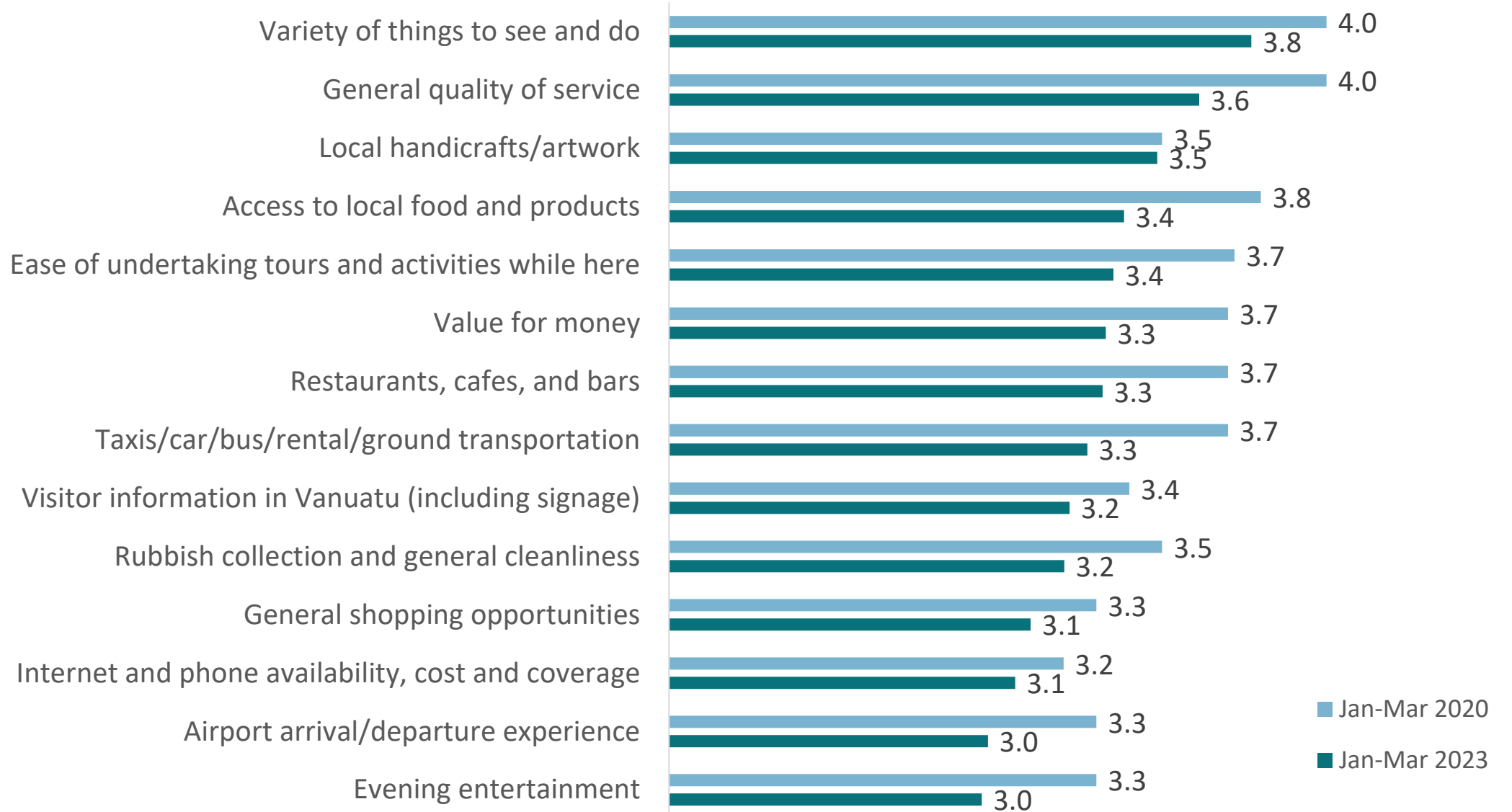


# Market breakdown



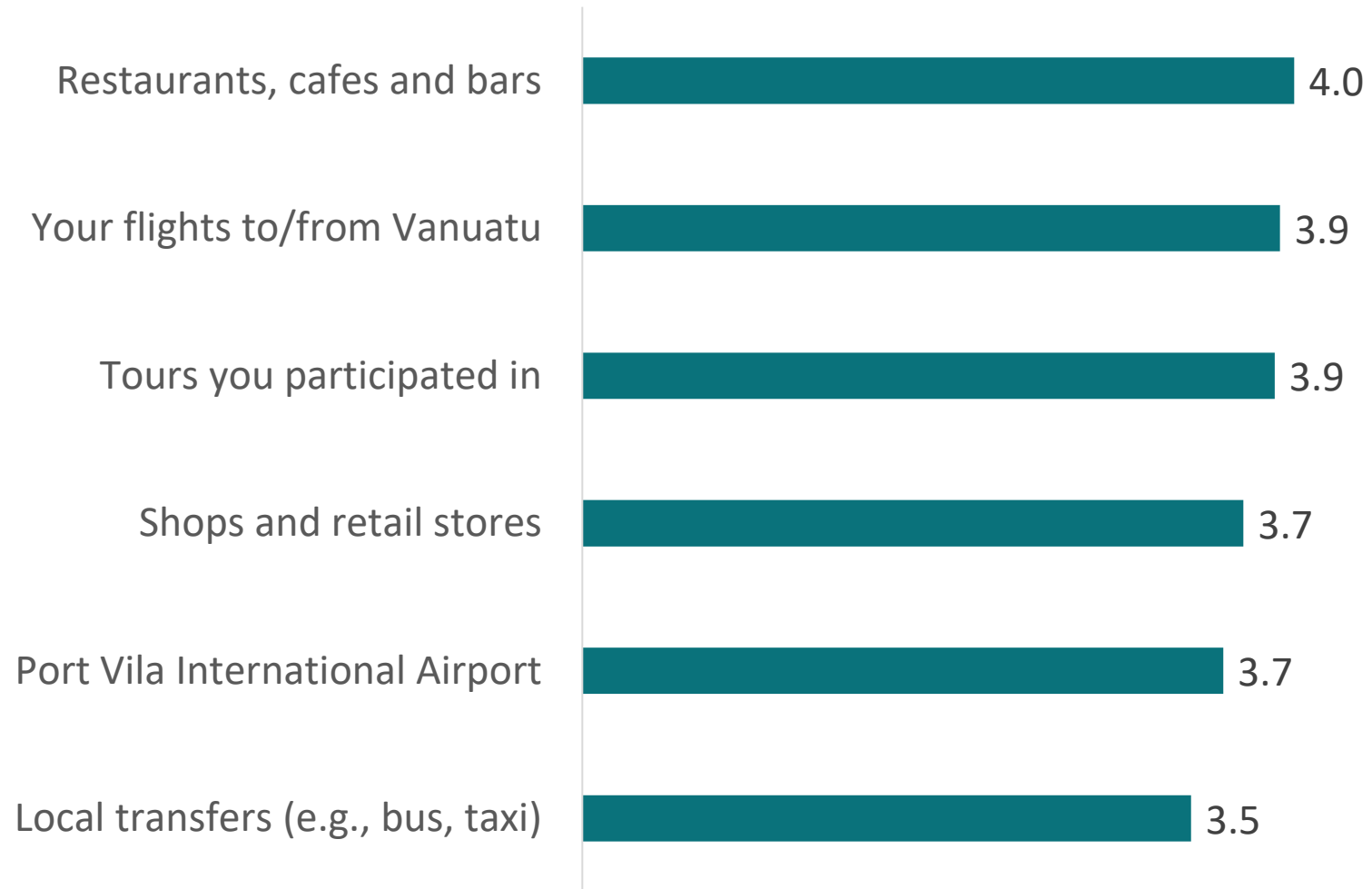
Note: \*Business visitors including respondents who visited for the purposes of business and conferences

# Satisfaction with travel experience



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

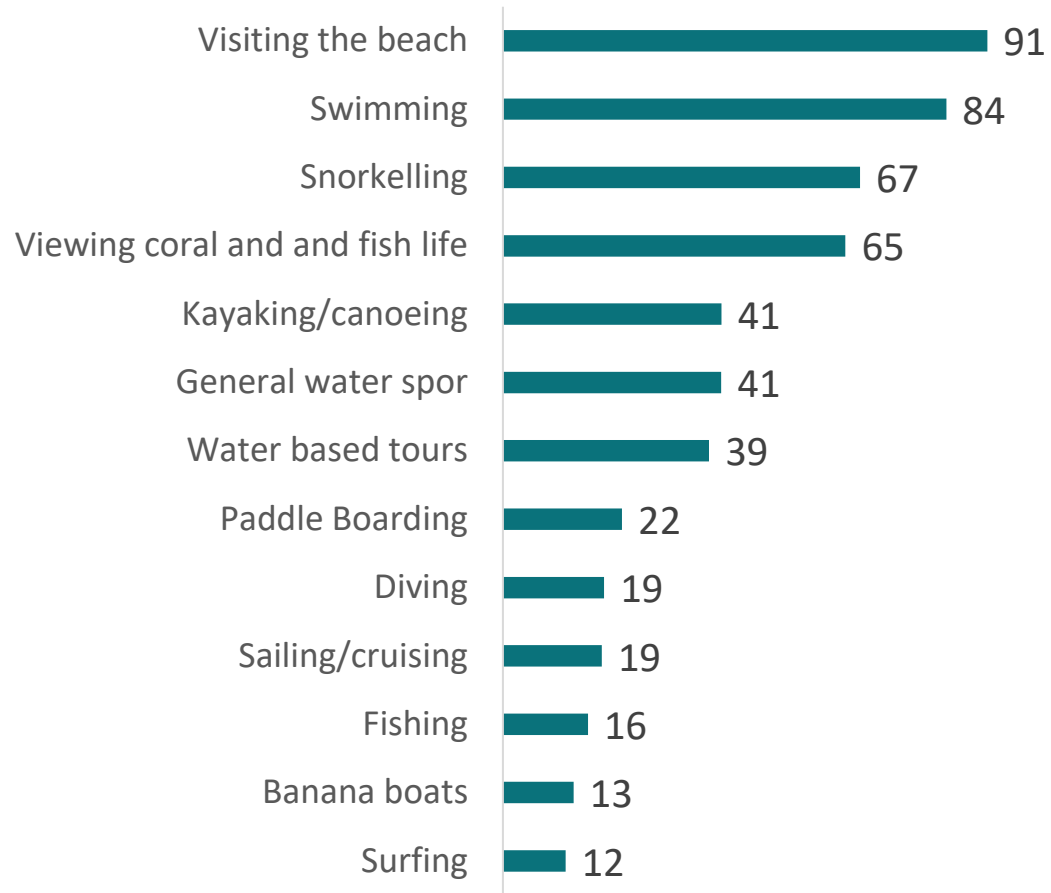
# Satisfaction with health & safety measures in tourism settings



Mean: 1=Very dissatisfied to 5=Very satisfied

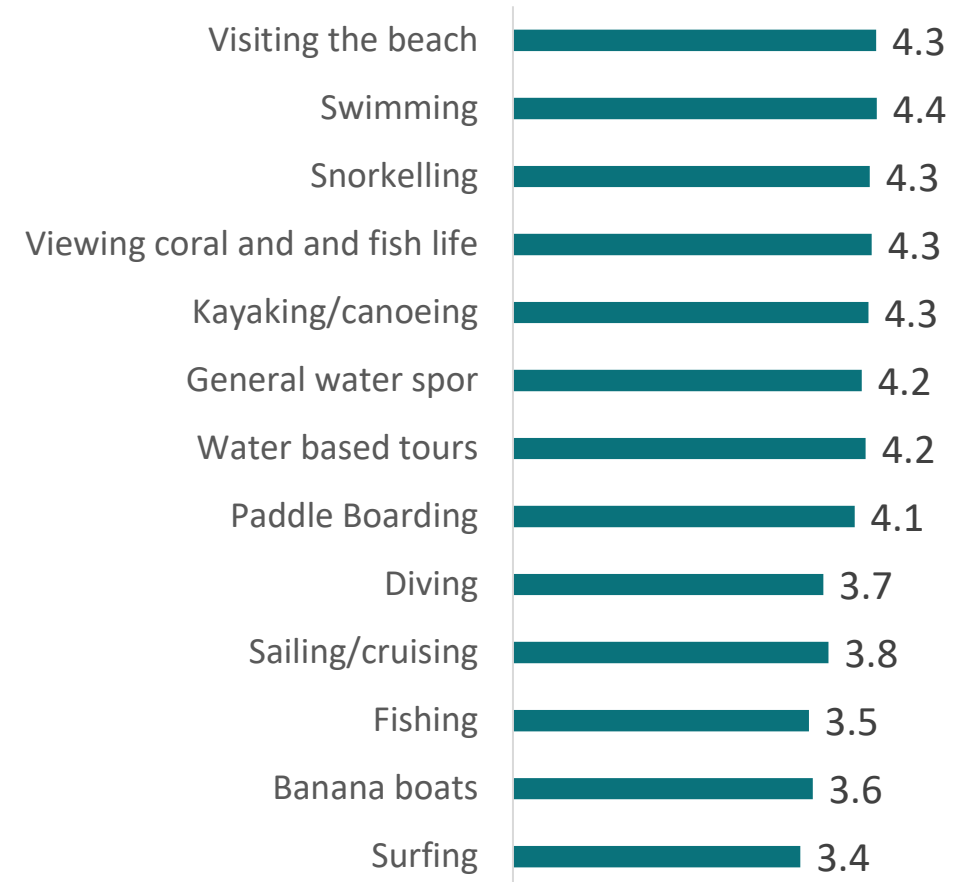
# Water-based activities

## Participation



Share of Visitors (%)

## Satisfaction

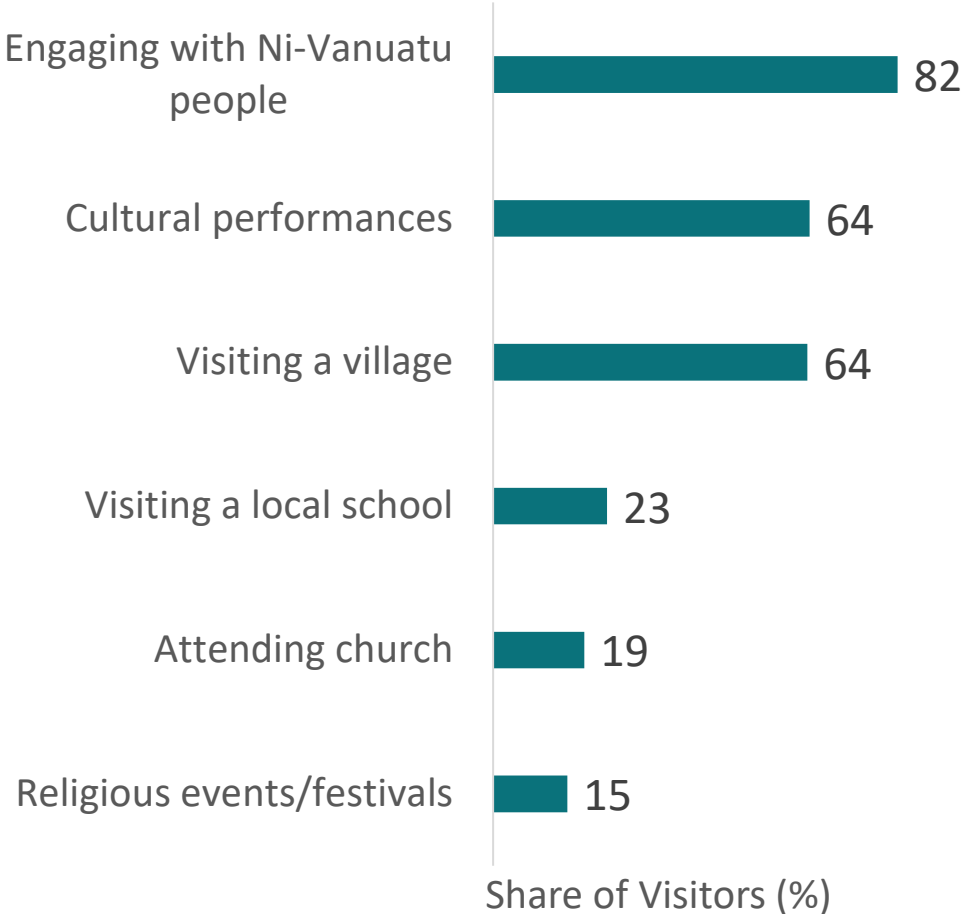


Mean: 1=Very dissatisfied to 5=Very satisfied

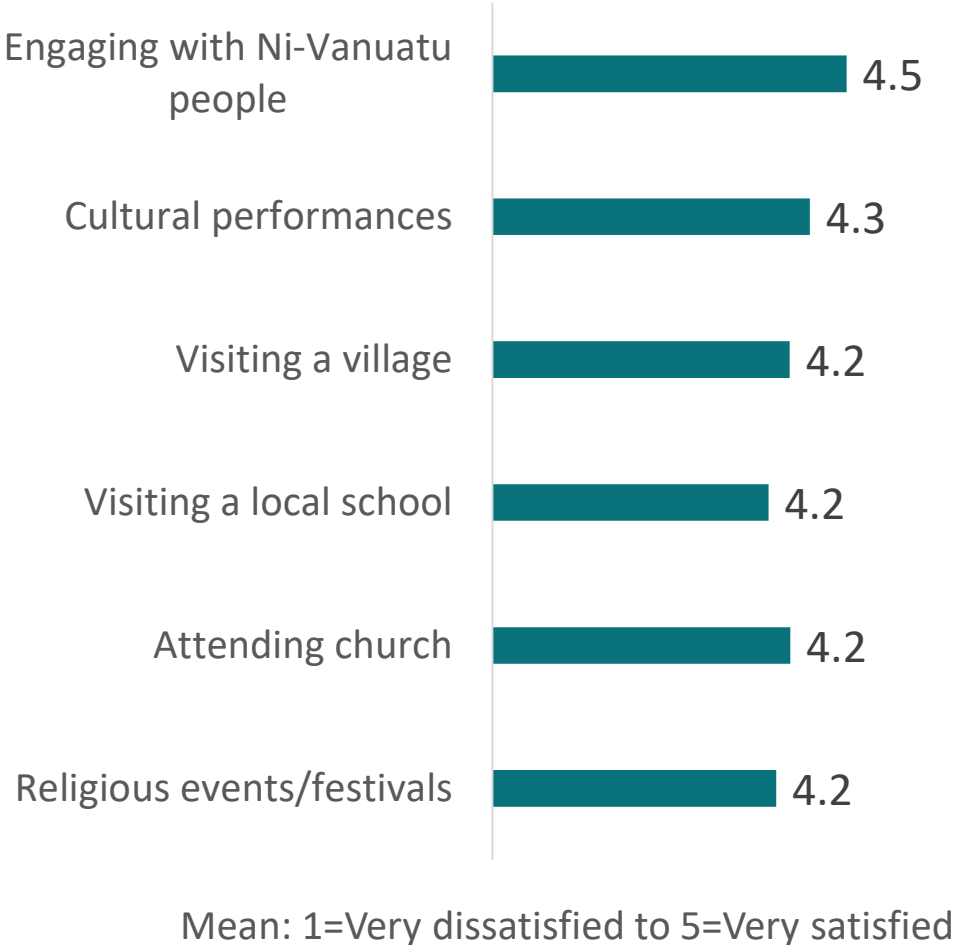


# Cultural interaction

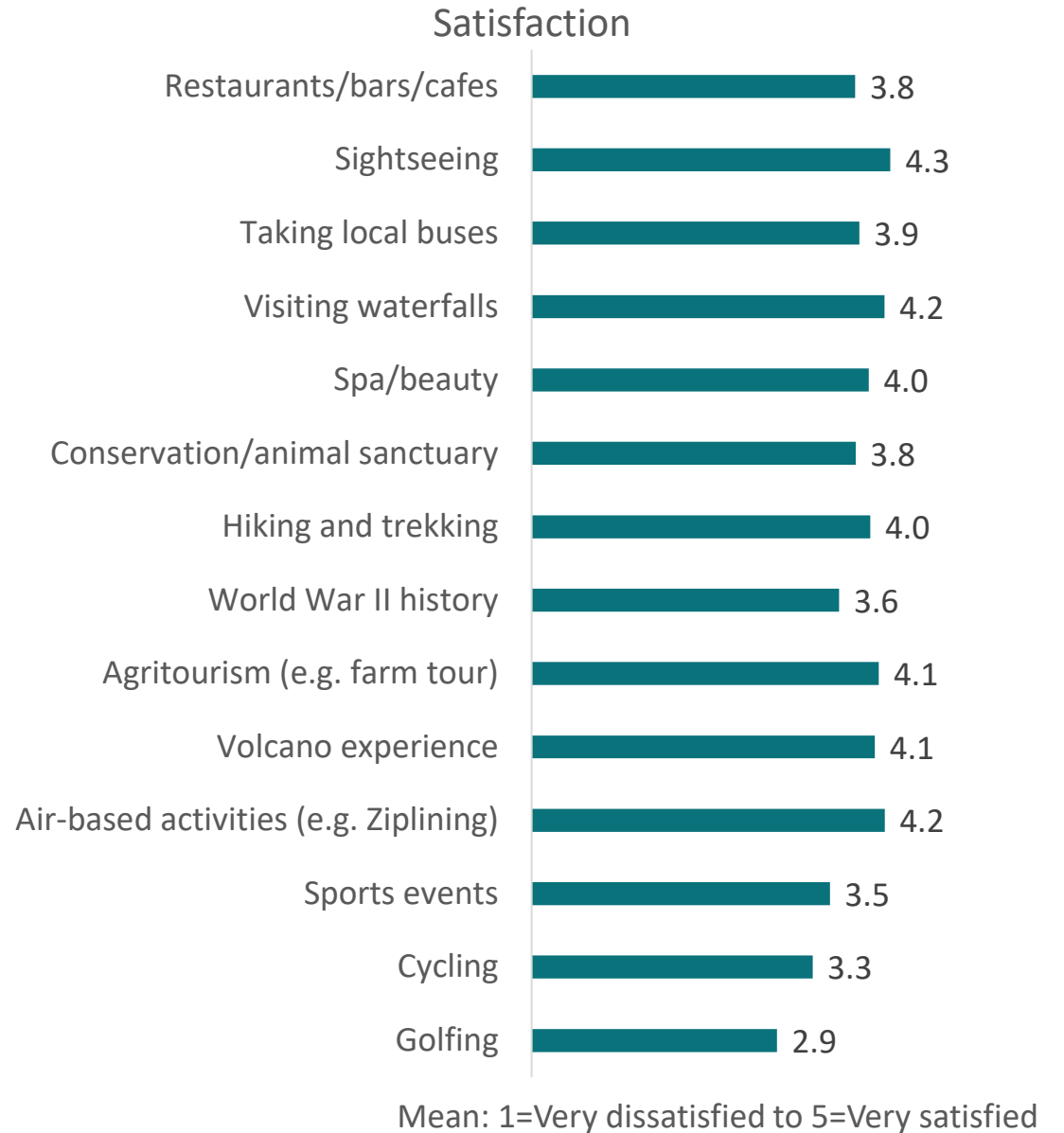
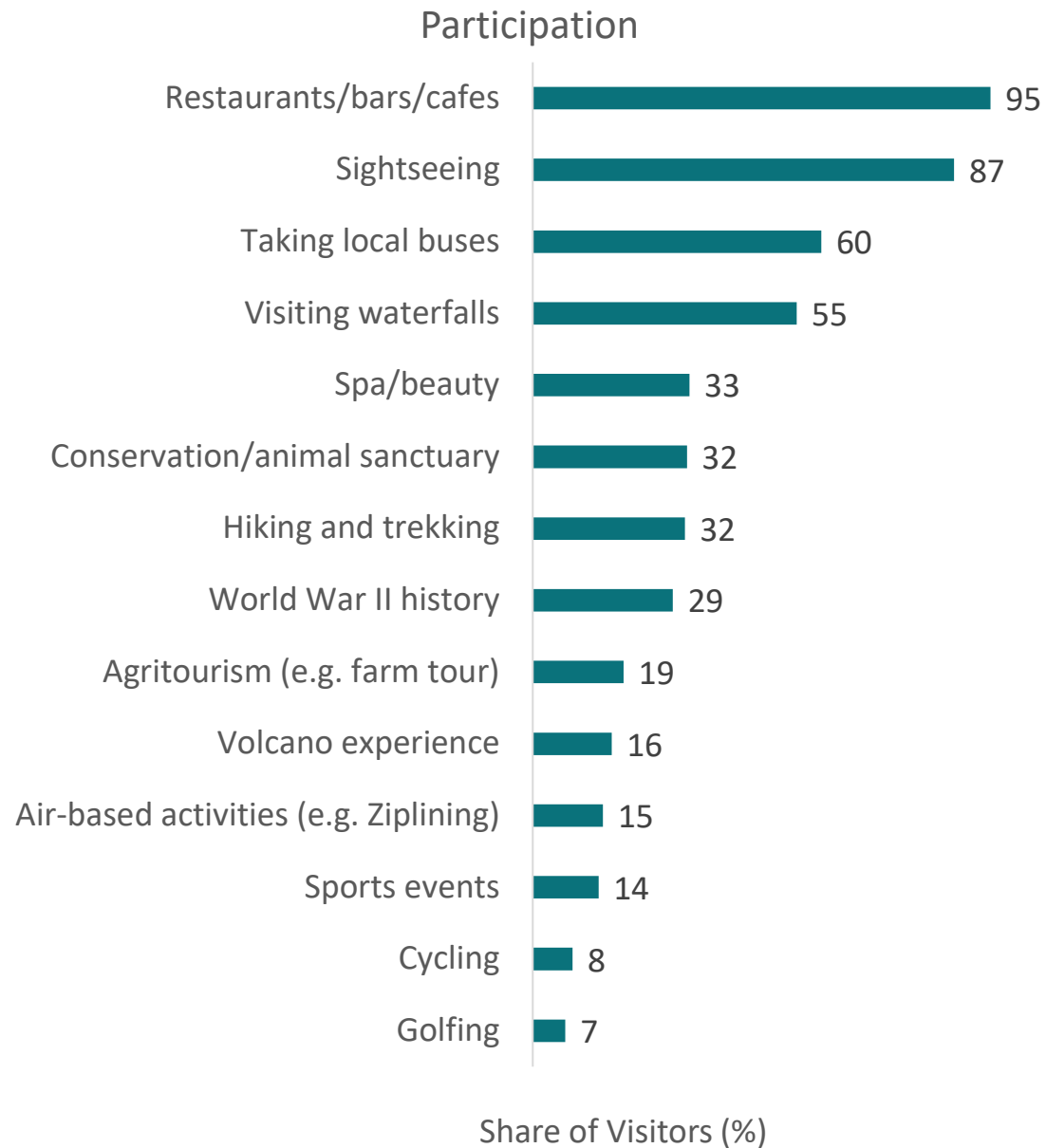
## Participation



## Satisfaction



# Land-based activities



# Shopping activities

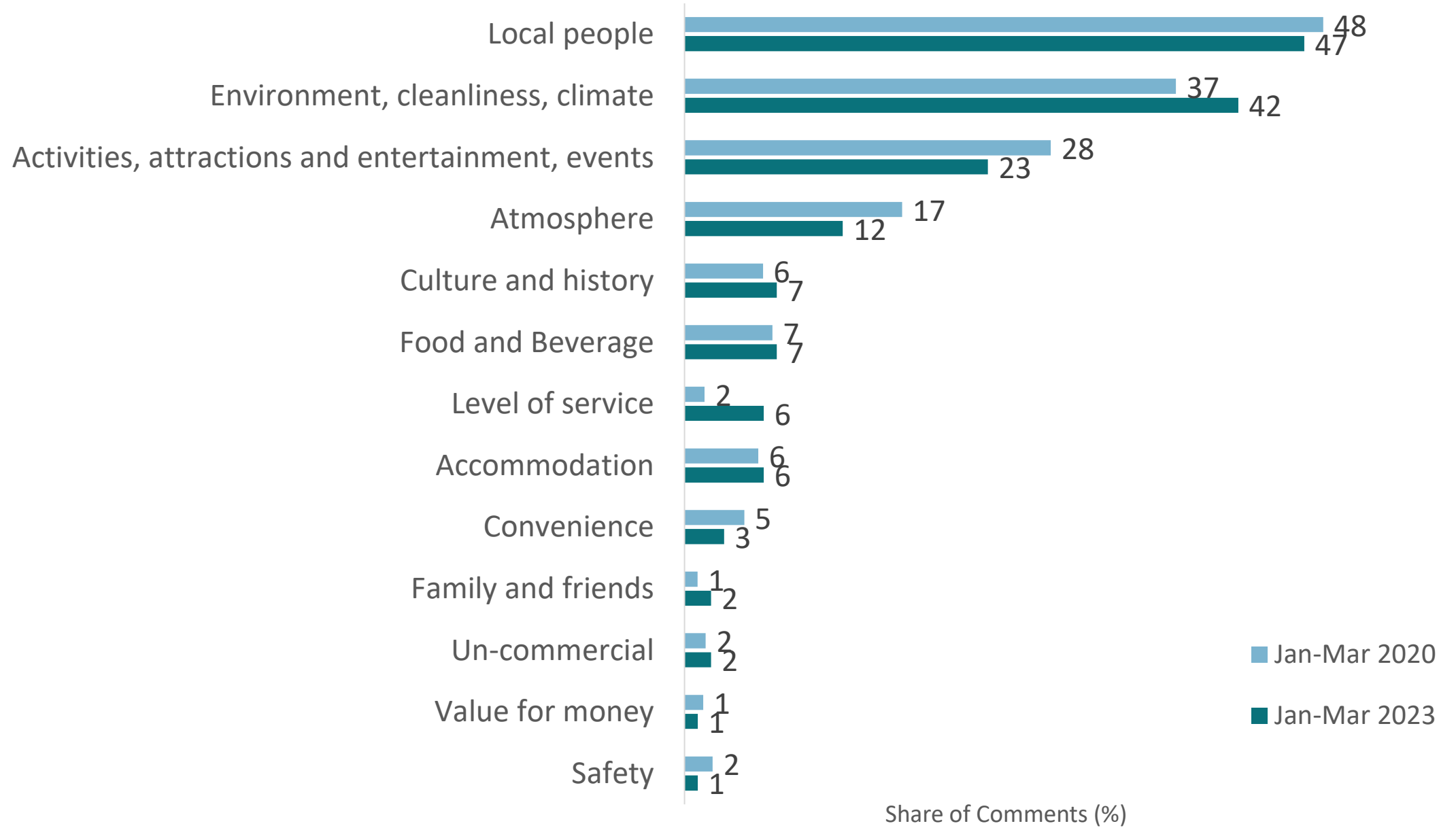
## Participation



## Satisfaction



# Most appealing aspects



Note: Multiple response analysis, so total does not add up to 100%. Total response for Jan-Mar 2023 N=556; Jan-Mar 2020 N=1127.

## Most appealing aspects: Local people

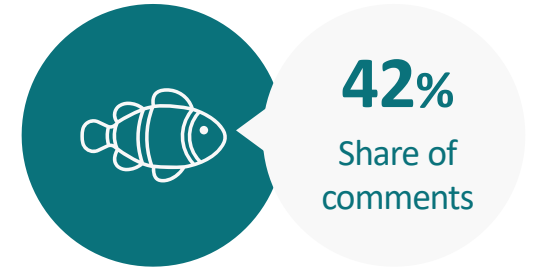


47%

Share of  
comments

- + Nature. Humility and friendliness of people. Walks along water. Show put on by locals at Hotel Beach.
- + How friendly the people were in the village we stayed in on Tanna. Have kept in contact with them since returning home. Spectacular scenery.
- + The local people working at the resort were very friendly. The blue holes and coastal beaches were great.
- + The people and the culture has us always wanting to come back and enjoy time with the locals with whom we have made friends with over the years and come back to see whenever we can visit
- + The Ni-Vanuatu locals! The stunning islands and the incredible snorkelling. Highlights were the Lelepa Tour, Mele Cascades (although they were very expensive), Blue Lagoon, Erakor Island and spending time in Pacific Lagoon Apartments.
- + Even with the torrential rain, loved being in the warmth. The people had very welcoming smiles. Loved being able to drive a Quad on the open road!
- + The friendly people, the culture. Just very relaxed. Unfortunately when we were there we had two cyclones and 2 earthquakes. Never did we feel unsafe. The resort staff were very attentive and kept us informed. Of course it affected our overall holiday plans, but the forced stay on Espiritu Santo was well worth it. The warm, pristine waters and secluded beaches, yummy local food.

## Most appealing aspects: Environments, cleanliness, climate



- + Cleanliness of the place, especially the harbour area in Port Vila.
- + Clean water, warm temp., fresh food, natural environment and friendly locals
- + Time spent with family in one of the most beautiful places in the world.
- + The gorgeous beaches and the mele falls. Everything is so green and beautiful there.
- + Friendly people and laid back attitude. Beautiful beaches and unspoilt sea environments. The travel time from Australia is very appealing as we have two small children.
- + The natural landscapes, waterfalls, beaches, and rivers were all beautiful. The people were all very friendly.
- + In Espiritu Santo - the pristine island. Untouched. Clean. calm. not overpopulated. Quiet. Beautifully natured locals.
- + "The people were so polite and easy to approach. Friendly as well. Feel safe while out having kava at the Nakamal late in the night. The beach were so beautiful and clean. The sea was also very clean and mesmerizing because of its beautiful color and clearness. So beautiful."
- + The people were so polite and easy to approach. Friendly as well. Feel safe while out having kava at the Nakamal late in the night. The beach were so beautiful and clean. The sea was also very clean and mesmerizing because of its beautiful color and clearness. So beautiful.

## Most appealing aspects: Activities, attractions and entertainment

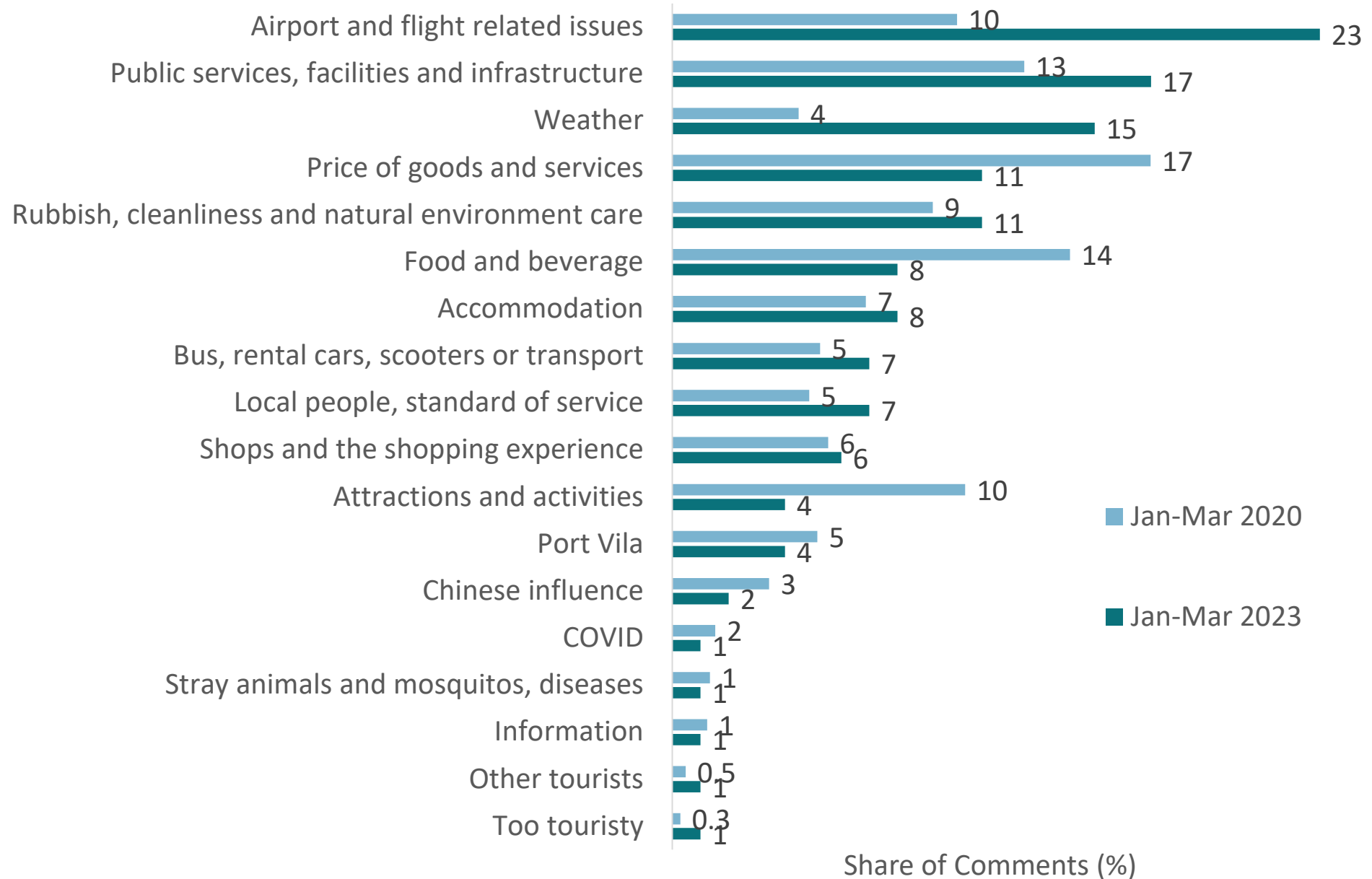


23%

Share of  
comments

- + Culture and friendly people Parliament House tour.
- + The nature based and water tours, like tours on different beaches and waterfalls. I went to blue lagoon which was fun.
- + ...The tours we did were very informative and we were lucky to be invited to a family village. I loved the resort Poppy's on the Lagoon, the staff were extremely friendly and very helpful when our flight was delayed to Auckland due to a weather event. The resort itself was just lovely.
- + Swimming on the east coast in and near the Blue Lagoon was spectacular. The management of our hotel during the crisis was extraordinary. The local people of Vanuatu are kind and happy people, even when faced with such terrible circumstances as losing their homes and livelihood.
- + The Ni-Vanuatu locals! The stunning islands and the incredible snorkelling. Highlights were the Lelepa Tour, Mele Cascades (although they were very expensive), Blue Lagoon, Erakor Island and sending time in Pacific Lagoon Apartments
- + Very friendly local people, overt Christian ethos and values, beautiful snorkelling, lack of crowds, fresh and healthy food, beautiful scenery, Whitegrass Resort on Tanna was a stand out.
- + Very diverse and different experiences can be had in one trip. snorkel, volcano, blue cave, etc. So much to do and see!
- + The visit to the volcano and diving in Santo is once in lifetime. The visit to the country is worthy only based on these two activities.

# Least appealing aspects



Share of Comments (%)

Note: Multiple response analysis, so total does not add up to 100%. Total response for Jan-Mar 2023 N=530; Jan-Mar 2020 N= 1048.



# Least appealing aspects: Airport and flights – related issues

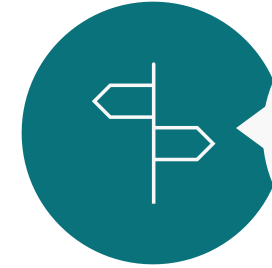


23%

Share of  
comments

- + Air Vanuatu, completely incompetent and unprofessional.
- + Inefficiency of Air Vanuatu:1. Cancellation of flights 2. Extremely reluctant to communicate or to make refund after agreeing it is correct.
- + The experience with Air Vanuatu for domestic flights was horrible. Flights cancels, lack of communication, lost baggage...
- + The airport for domestic service when our flight to Tanna was cancelled was HORRENDOUS. It was like being in a cattle call. NO ONE WOULD HELP. Limited information on HOW TO FIX this type of problem... It was really an AWFUL EXPERIENCE!!
- + Air Vanuatu changing/cancelling flights, which meant we had to pay a lot more for extra accommodation. Difficult to find information online and to book accommodation online. Phone and internet service was unavailable on a day we needed to book our next accommodation.
- + Lack of information provided by air Vanuatu due to cyclone cancellation of return flight - it was hard to chase information - this had disproportionate negative impact on many other.
- + The air travel was very worrying. Our flight times were constantly changing and we were worried that we could not go home. We ended up flying out with Air Fiji as our Air Vanuatu flight was cancelled. This is a big problem as most people have to get home on time and you cannot relax if you do not know whether your flight is going to be cancelled..

## Least appealing aspects: Public services, facilities and infrastructure



**17%**  
Share of  
comments

- + Condition of roads and sidewalks for casual walking. Not safe.
- + The roads are appalling. We drove around the island and they were dreadful. Some destinations were abandoned due to the roads, i.e. the road to Erakor, Devil Point Road, Pango Road and beyond.
- + Difficulty getting around, public transport is dismal.
- + No air-conditioner when shopping, especially in non duty free shops. Internet was not free in our resort. Food wasn't the best quality in our resort and eating the same food. The airport needs air-conditioning.
- + The limited means of transportation. Only Mini buses were readily accessed but we have to wait until it is full then it will leave.
- + The facilities were not well maintained; there was a lack of variety restaurants in Port Villa. Transport to and from the resort was difficult; with taxi and buses either unwilling to take us or charging wildly inflated prices.
- + It was disheartening seeing the amount of rubbish on the streets and lack of rubbish disposal (e.g., bins) available.
- + Vanuatu was recovering from the covid lockdown so like most other countries the hospitality industry was struggling.
- + Very run down. Derelict buildings in the centre of Vila and feels really shabby since my last visit. Standard of food in almost all cafes, bars and the resort we stayed in was very poor indeed. Not Western standard.
- + The selection of groceries and food left a lot to be desired but they had just endured a major cyclone so much of their fresh food wasn't available due to lack of electricity

## Least appealing aspects: Weather



**15%**  
Share of  
comments

- + The very unfortunate cyclones. No information and no organised help at the airport.
- + Many activities were unavailable because of the cyclone - obviously unavoidable.
- + The weather let us down a little, just unlucky had the effects of edge of cyclone come through. Lots of wind, big swell and rain.
- + The weather was terrible the whole time because of the cyclone and was very hard to find good food.
- + No warning whatsoever that a severe cyclone was mere hours away. We would never have got on the plane.
- + Telecommunication and Power Supply during Cyclone Judy and Cyclone Kevin.
- + Plans changed without notice - tours would visit other places, not as expected/advised, bit chaotic at airport when flight was cancelled due to cyclone.
- + We were there during cyclone and received no warnings or assistance before, during or after cyclone from the resort.
- + There was a lot of damage due to cyclone, and smoke from all burn off. Not blaming anyone. Just sad to see the damage.

## Least appealing aspects: Price of good and service, value for money



- + Cost of living : Food prices are extreme. Taxi is very expensive
- + Expensive restaurants; lack of beaches you can swim at freely in Port Vila.
- + The cost of supermarket shopping. Prices of certain items I found astronomical. For example a pound of butter was the equivalent of about \$17NZD. \$20nzd for 500g cheese.
- + Local tours were a bit of a rort. Prices suggest all inclusive but you end up paying for every stop. Including stopping at places that were never agreed upon.
- + Prices of accommodation. Very ran down, many rats, air con broken, roof leaking, etc, and VERY expensive. Difficult to move around without cars, always having to go on very expensive tours. Being asked for more money in cultural village.
- + Bus drivers raising their prices because we were from Australia also your roads are shocking going pango is horrible.
- + The cost of food and drink in tourist bars and cafes is quite high and more expensive than Europe in most cases, This might make visiting less attractive for people looking to visit on a budget.
- + Eating in restaurants and cafes is very expensive. I didn't like when locals tried to rip us off. Most locals were however super friendly and very helpful and fun.

# Suggestions for improvement



■ Jan-Mar 2020  
 ■ Jan-Mar 2023

Share of Comments (%)

Note: Multiple response analysis, so total does not add up to 100%. Total response for Jan-Mar 2023 N=332; Jan-Mar 2020 N= 489; \*Suggestion for improve Infrastructure include airport facility improvement

## Suggestions for improvement : Flight – related issues



- + Direct flights to Santo would have been more convenient.
- + Improved reliability of direct flights between New Zealand and Vanuatu.
- + Communication from Air Vanuatu about cancelled flights was non-existent. We had no idea what was going on and how many days we were going to be stuck for
- + Better airline communication. We had one flight cancelled suddenly and we had to reschedule PVI to Luganville. Then when airports closed it took a while to determine what and when hotels and resorts were open.
- + Airline bumped flights without any communication, was very stressful and seemed like a very disorganised airline.
- + Better communication from the airline regarding flights on way home, and better accommodation for the period we were stuck in Port Vila.
- + Getting our longboards (approx. 9'6") on the flight. Had to leave them at home! This caused rental problems in Vanuatu.
- + My return flight was cancelled without notice and Air Vanuatu couldn't find me a replacement in less than 7 days. It should have been handled better, awful service.
- + Public information about airport opening and available flights was extremely poorly organised, post cyclone.

## Suggestions for improvement: Public services and infrastructure



- + The side roads and pavements needed updating.
- + Signage and upkeep at local attractions.
- + More ATM access.
- + Improving the arrival experience. Poor ventilation and slow processing on arrival with minimal staff.
- + Return of power supply and network after natural disasters.
- + Public information about airport opening and available flights was extremely poorly organised, post cyclone
- + Better internet and phone coverage. VUI not dropping out all the time.
- + Mainly resort facilities not up to standard and many shops not reopened since covid and storm.
- + Informing tourists of expected costs of buses and taxis.
- + Information on how to catch local buses. Better lighting for local buses at night so we don't wave down a van that is not a bus. Maybe like a light up dash sign.
- + More restaurants, improve the roads. Basic pot hole maintenance on the sealed roads and more grading and rolling on the rubble roads. I suggest this would be an ideal addition to the annual Australian aid package. Investigate the use of polymers on the unmade roads.

## Suggestions for improvement: Activities, entertainment and transport



13%

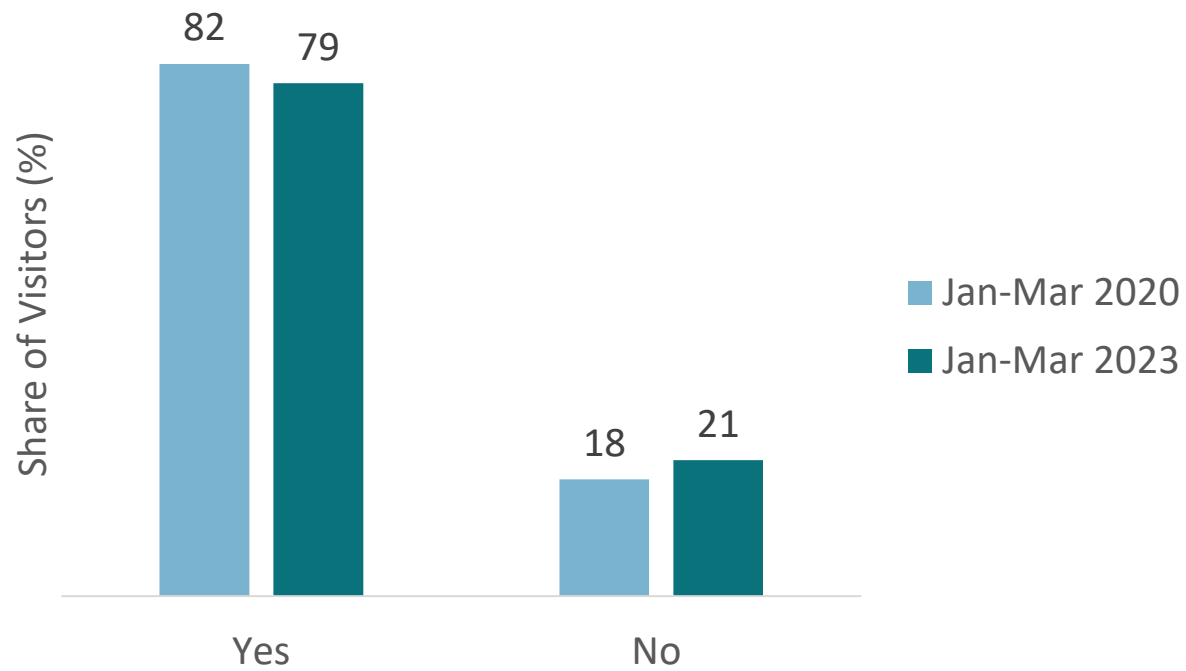
Share of  
comments

- + Entertainment in the resort even in the off-season
- + The airline and more attractions, restaurants and things to do
- + There is a desperate need to refurbish many things, including restaurants, resorts, swimming pools, museums.
- + Disappointed we couldn't see the waterfalls - no tours were going there for whatever reason.
- + Informing tourists of expected costs of buses and taxis
- + more accessible beaches from Port Vila.
- + Improve the standards of public buses, they scared me
- + ...Just not good value a day trip anywhere will be \$150-\$200 taxi and entrance fees are too high.
- + ...not having to pay to enjoy a swim in the sea and to enjoy the beaches.
- + There is far too many things to mention but being over charged by taxi drivers, bus drivers, transfer drivers. All vehicles were rusted out and falling to pieces. If there was no prices on items in shops we would be overcharged
- + They need bigger boats for the sea trips. Banana boats are scary and not safe. The smaller plane operators are to follow strict regulation. One of the charter flight I took with air taxi (or unity air I do not remember) was scary. The pilot was showing his "Topgun Maverik" skills without giving a prior notice....not impressed.

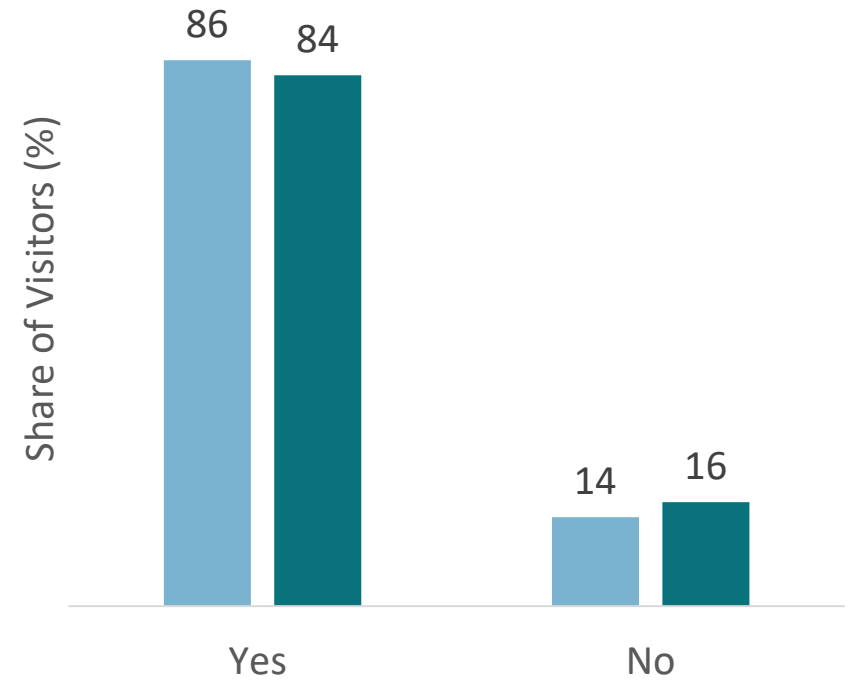


# Future intention

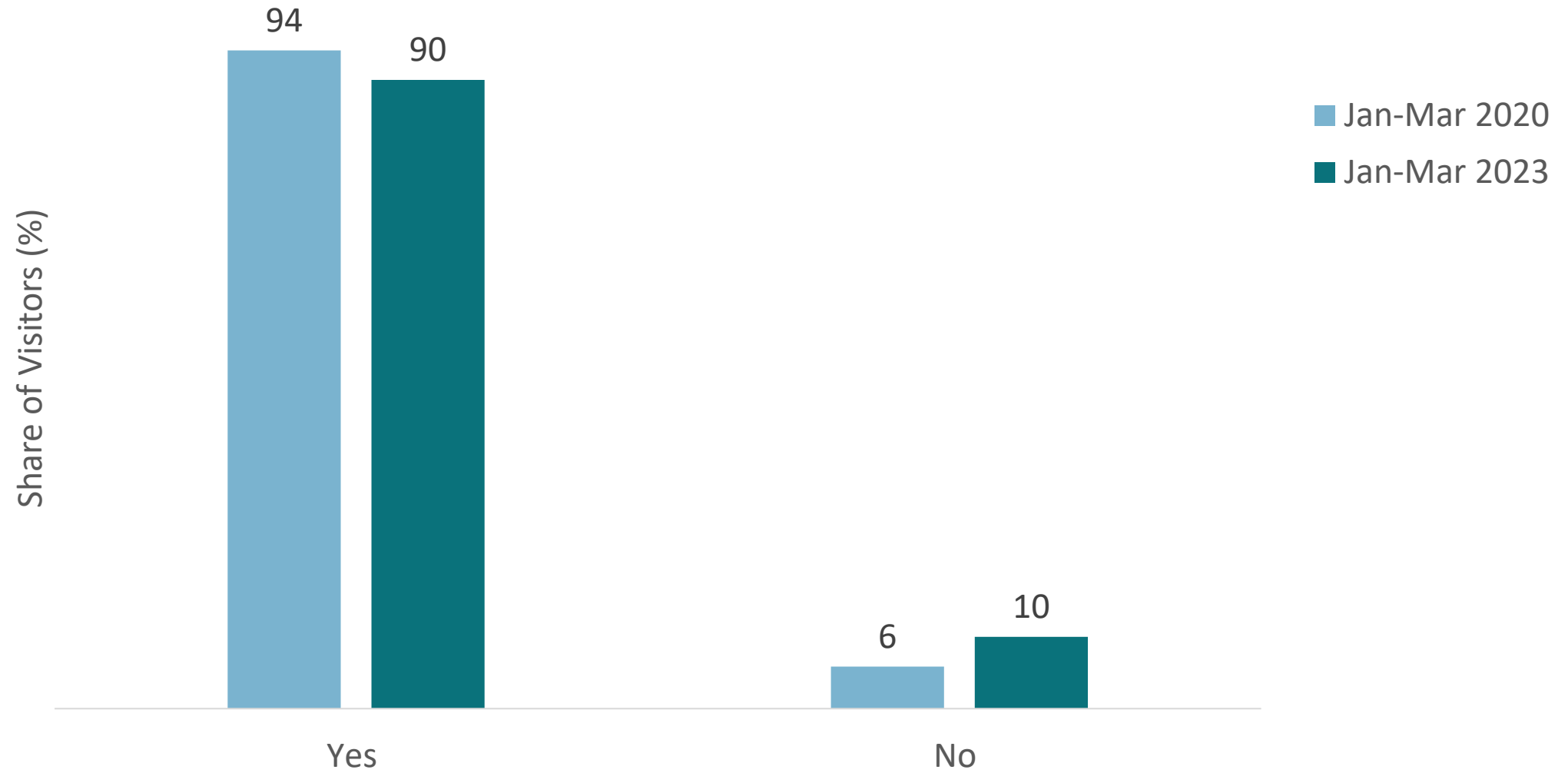
## Willingness to return to Vanuatu



## Willingness to visit outer islands



# Willingness to recommend





NEW ZEALAND  
FOREIGN AFFAIRS & TRADE  
MANATŪ AORERE



# Thank you

Authorship: B. Bai, D. Zhu, B. Bakker, J. Doan, P. Kim and M. Orams