

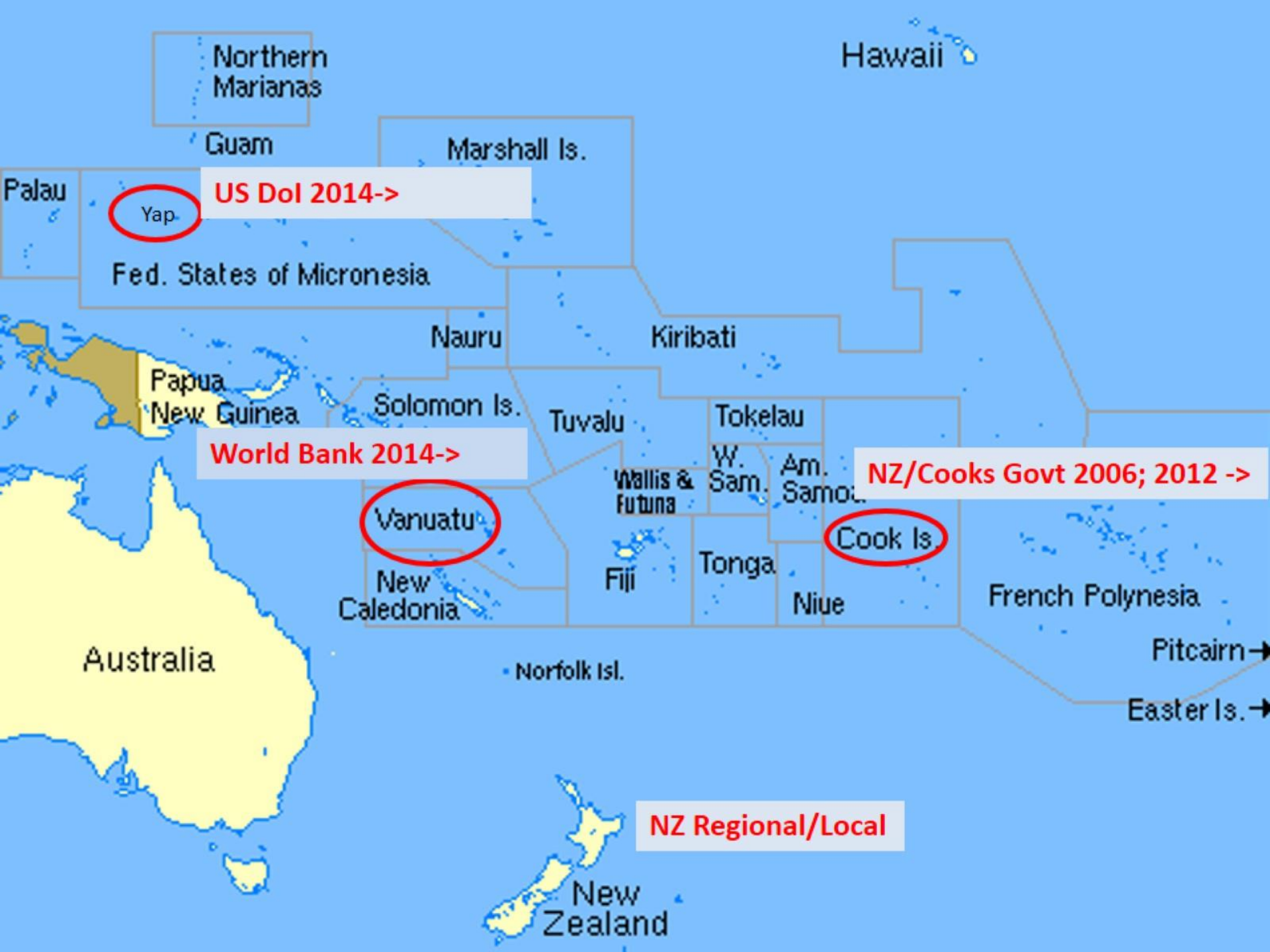
# Vanuatu International Visitor Survey

Annual Report  
November 2014 – November 2015









Northern  
Marianas

Hawaii

Guam

Marshall Is.

Palau

Yap

US DoI 2014->

Fed. States of Micronesia

Nauru

Kiribati

Papua

New Guinea

Solomon Is.

Tuvalu

Tokelau

World Bank 2014->

Vanuatu

Wallis &  
Futuna

W. Sam.

Am. Samoa

NZ/Cooks Govt 2006; 2012 ->

Cook Is.

New  
Caledonia

Fiji

Tonga

Niue

French Polynesia

Australia

Norfolk Isl.

Pitcairn ->

Easter Is. ->

NZ Regional/Local

New  
Zealand

# IVS MODEL

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- Immigration collects email addresses as part of arrival/departure process
- Email addresses sent to tourism office/research team
- Visitors sent email after departure
- Visitors enter data (short and long answer)
- Extra incentive offered (prize draw)
- Basic analysis is instantaneous
- More detailed analysis of data is possible for both quantitative and qualitative inputs
- Information disseminated widely through web, media and workshops (Qtly & Annual reports; data mining; workshops)

## BENEFITS

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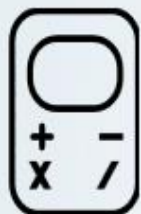
- Tourists are in a position to reflect and have credit card information/details to hand
- More accurate estimates of pre-paid spend
- Long detailed qualitative inputs are possible
- Limited costs and labour
- Speedy analysis and dissemination
- Government agency collaboration
- Engagement of industry in research – ‘crowd sourcing’
- Outer Island/Regional/local data generation
- Barometer enables tracing of policy impacts
- Translation of data into re-world benefits: *evidence based, yield focused strategies*



# November 2014 – November 2015 (excl. Feb-April)



**29,637** Emails Sent



**16%** Conversion Rate



**4,740** Respondents

Approx 5% of all visitor arrival during the annual period

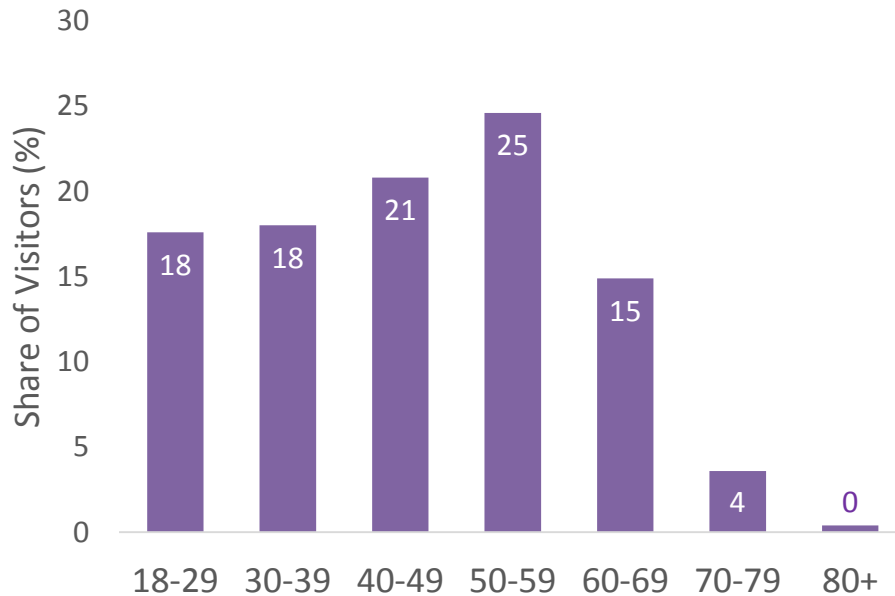


Covering **9,593** people

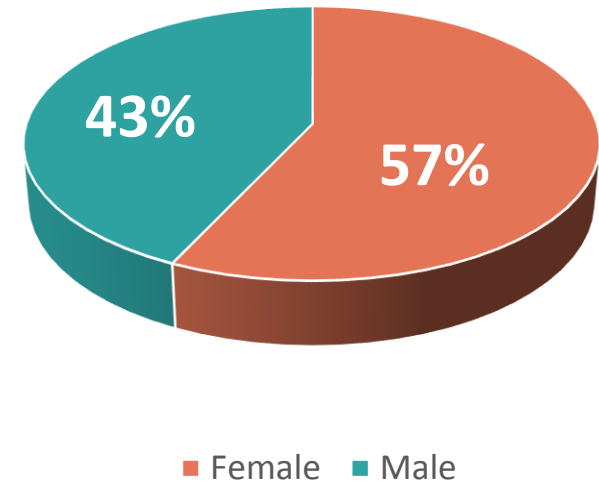
Approx 10% of all visitor arrivals during the annual period (covering spend)

# People Covered

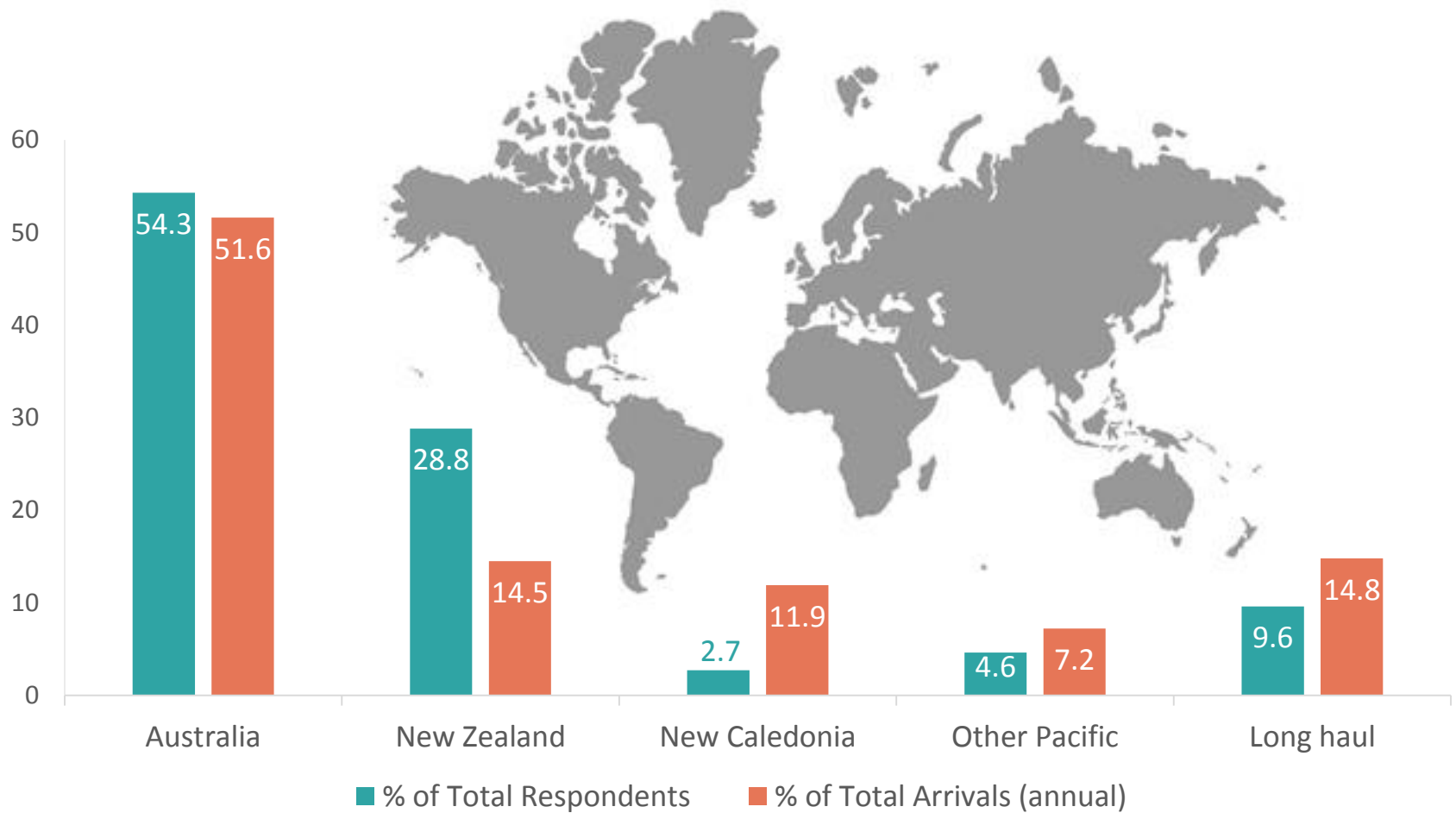
## Age Groups



## Gender Ratio

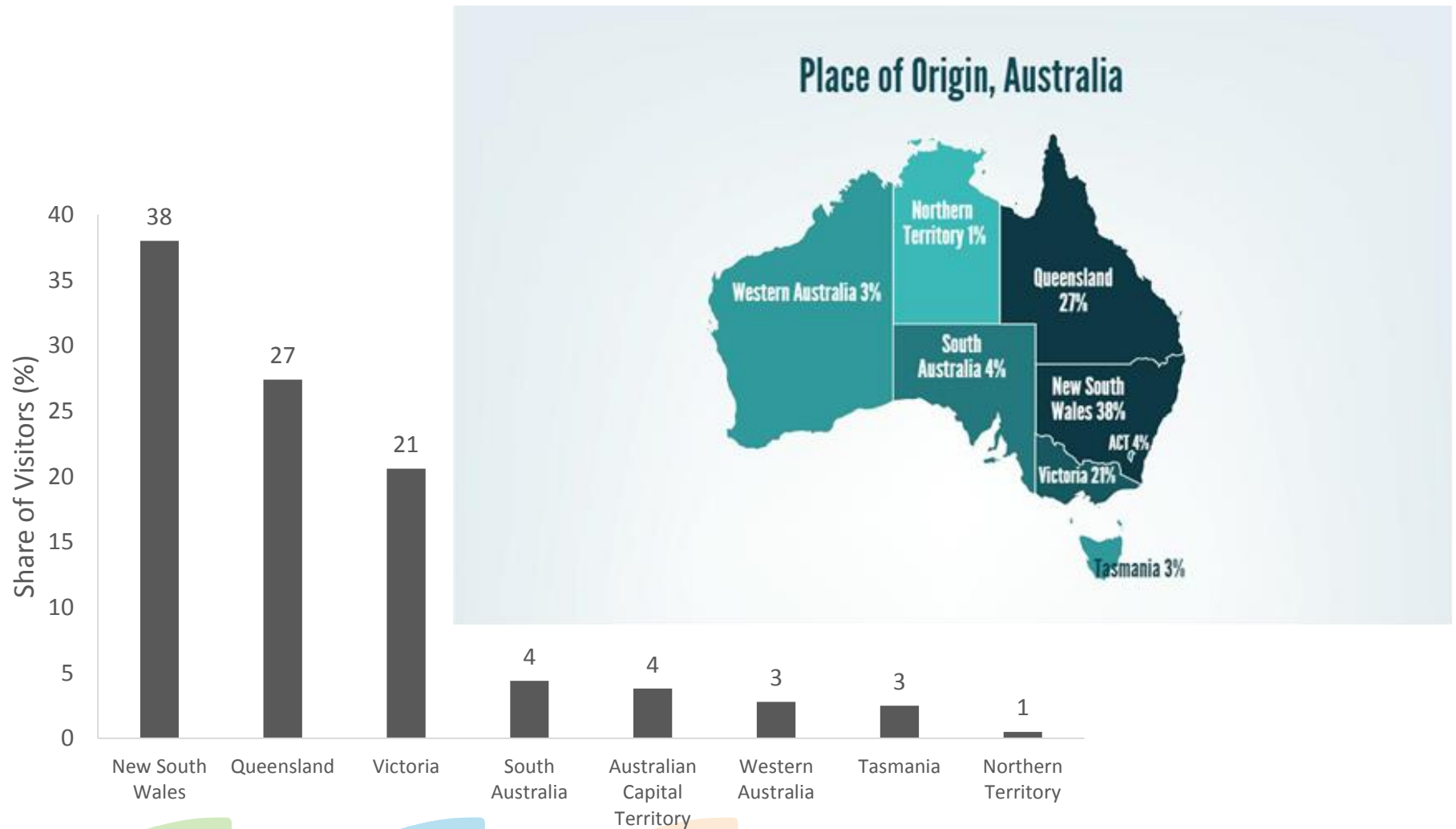


# Country of Origin



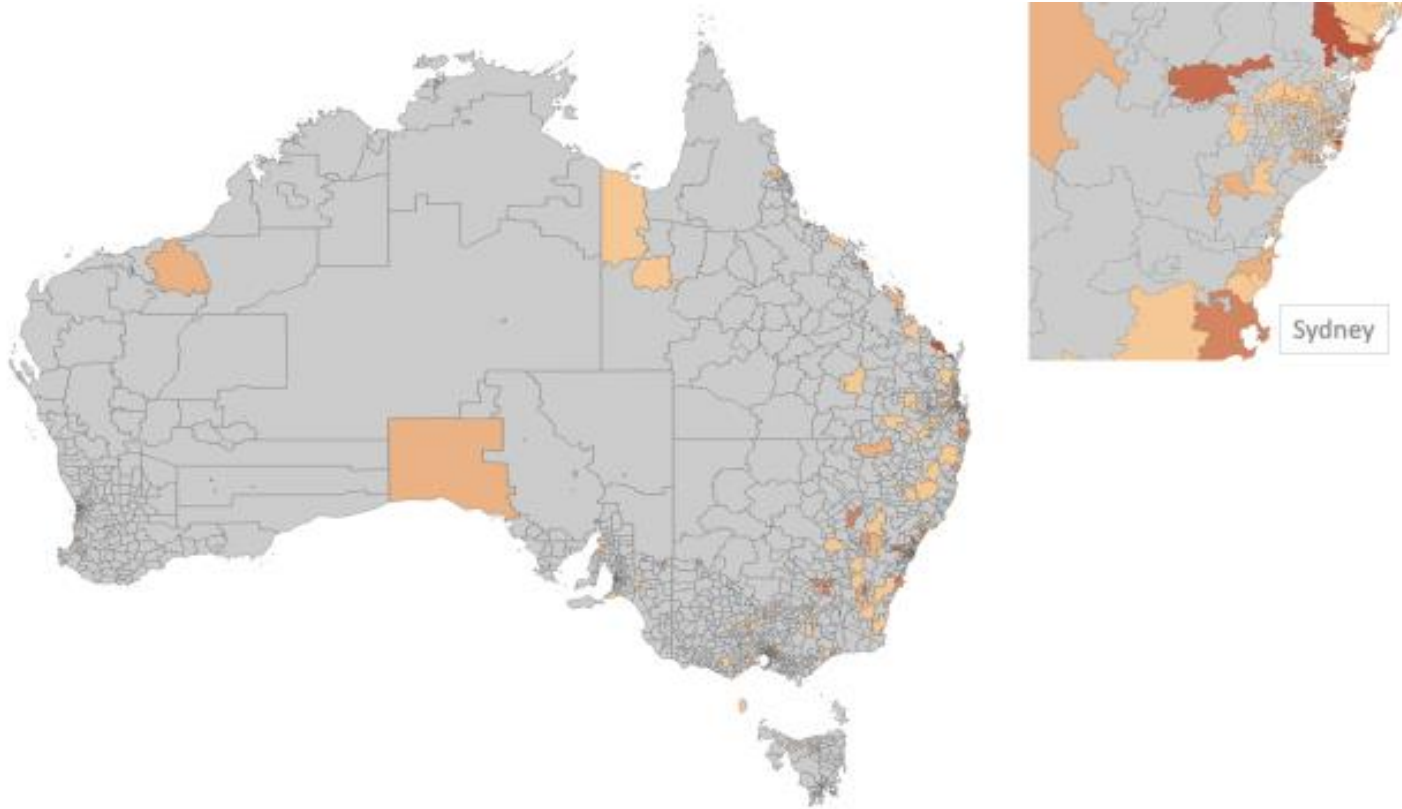


# Australian Visitors

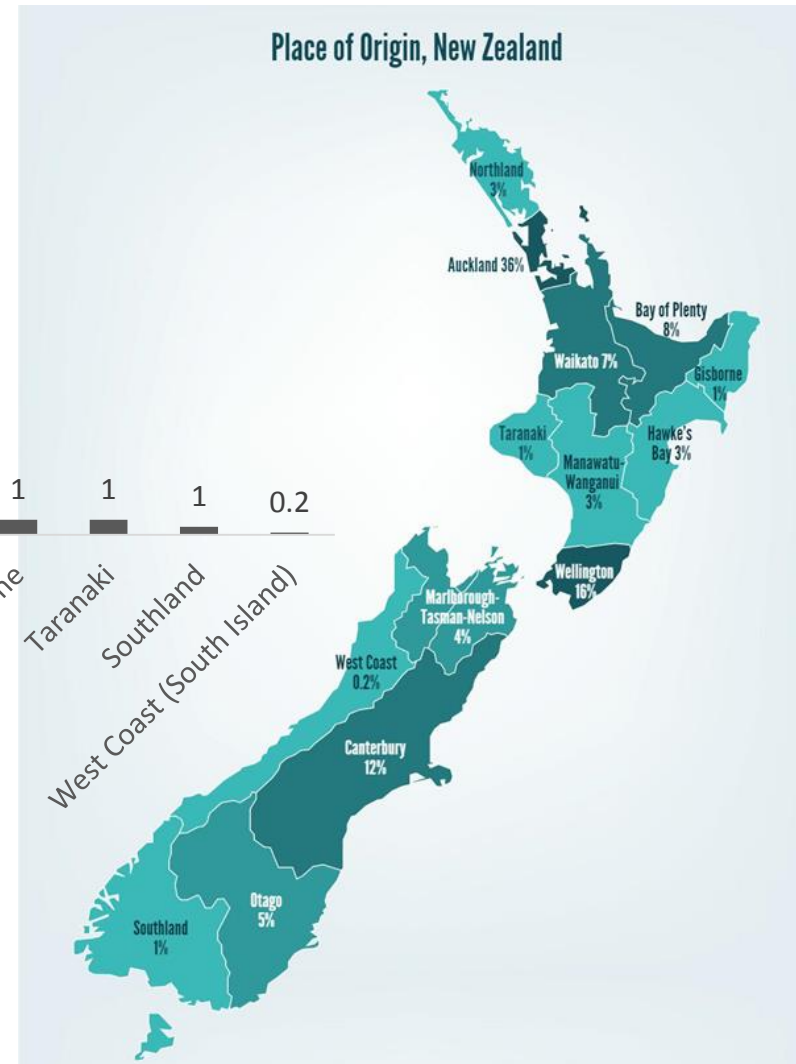
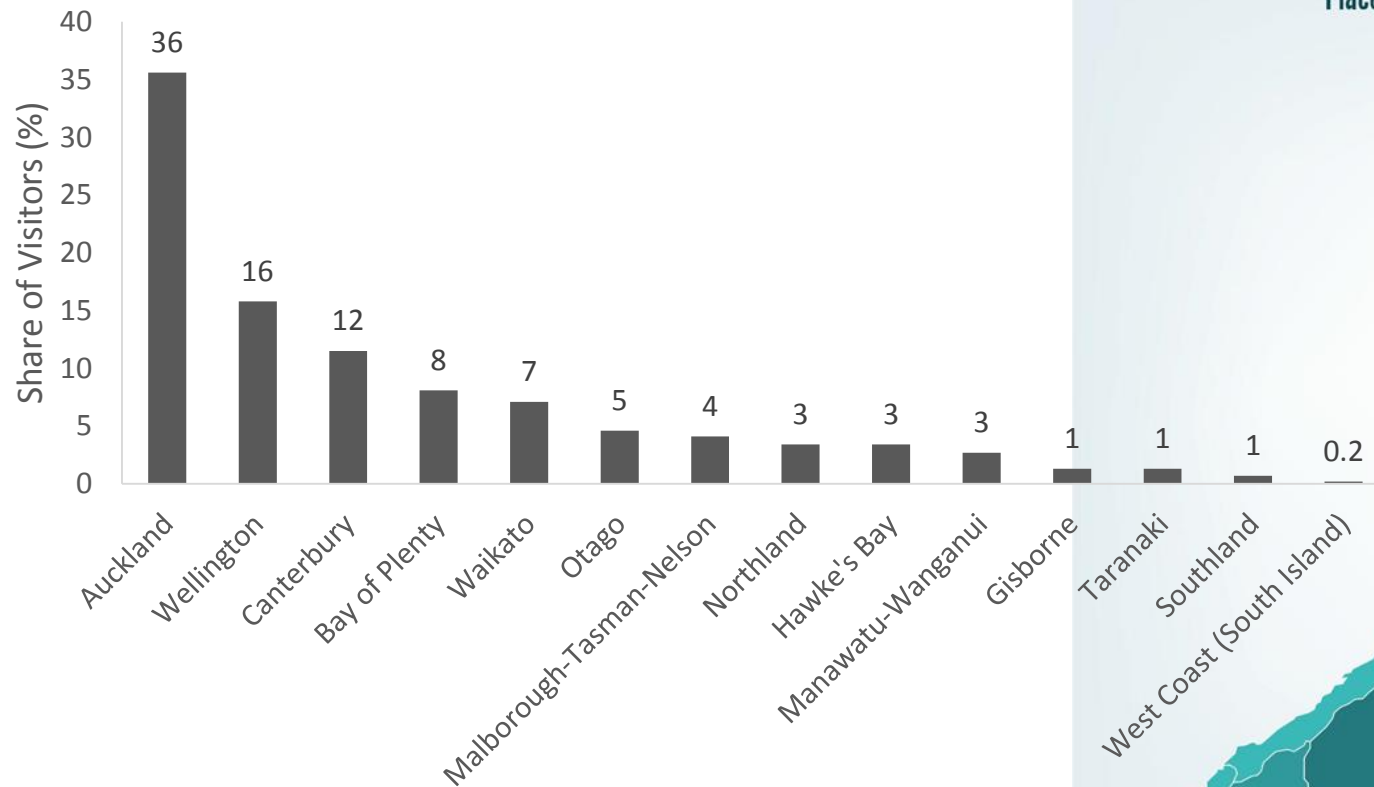


# Australia Postal Code 'Heat Map'

Postal Code Data from September 2015 forward

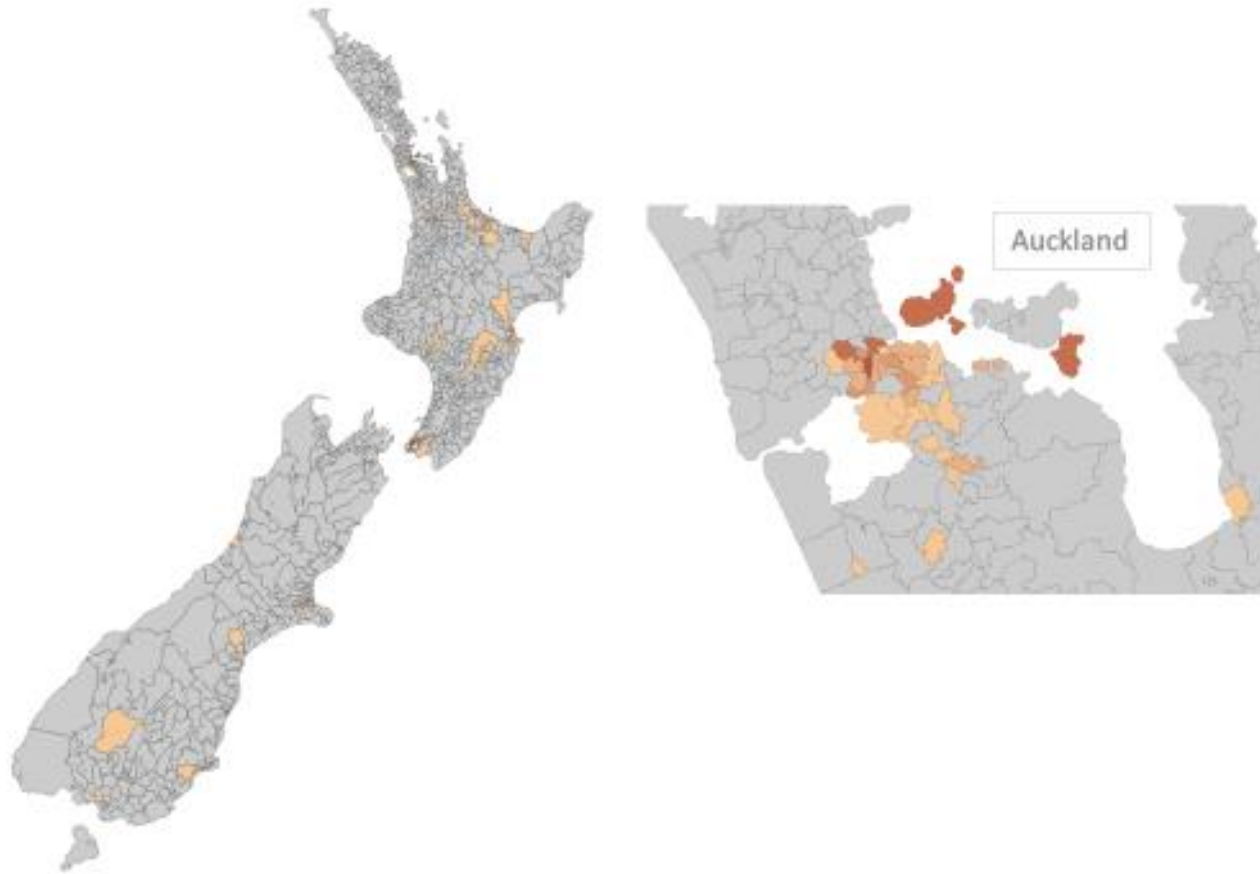


# New Zealand Visitors



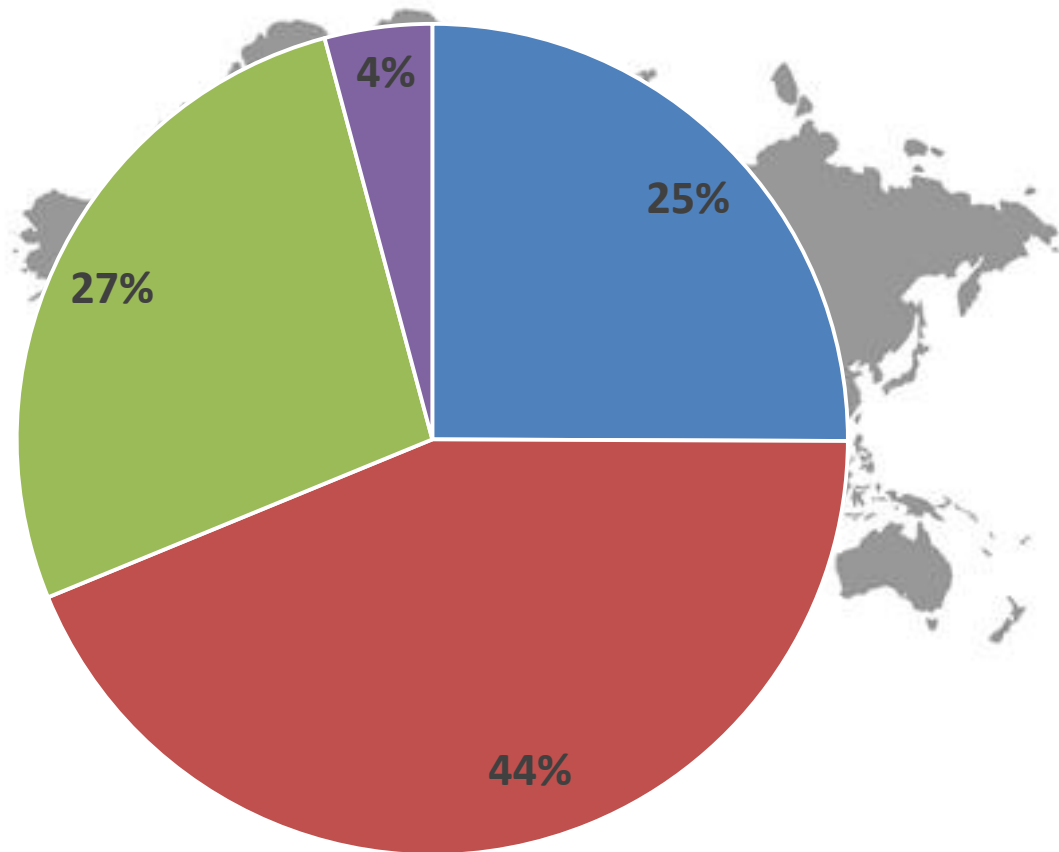
# New Zealand Postal Code 'Heat Map'

Postal Code Data from September 2015 forward





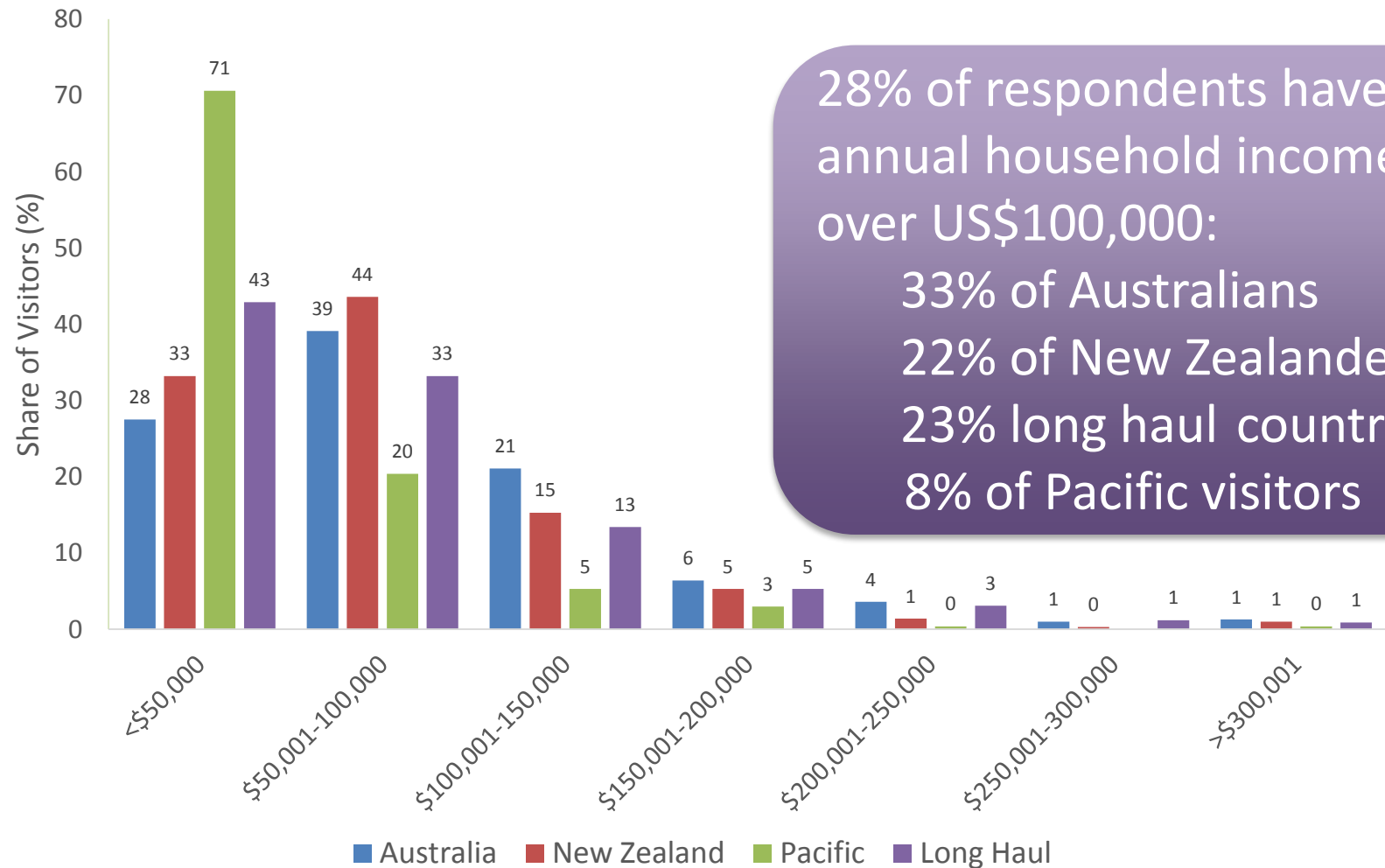
# Long Haul Market



■ North America ■ Europe ■ Asia ■ Other

[www.nztri.org](http://www.nztri.org)

# Annual Household Income – country of origin



28% of respondents have an annual household income over US\$100,000:

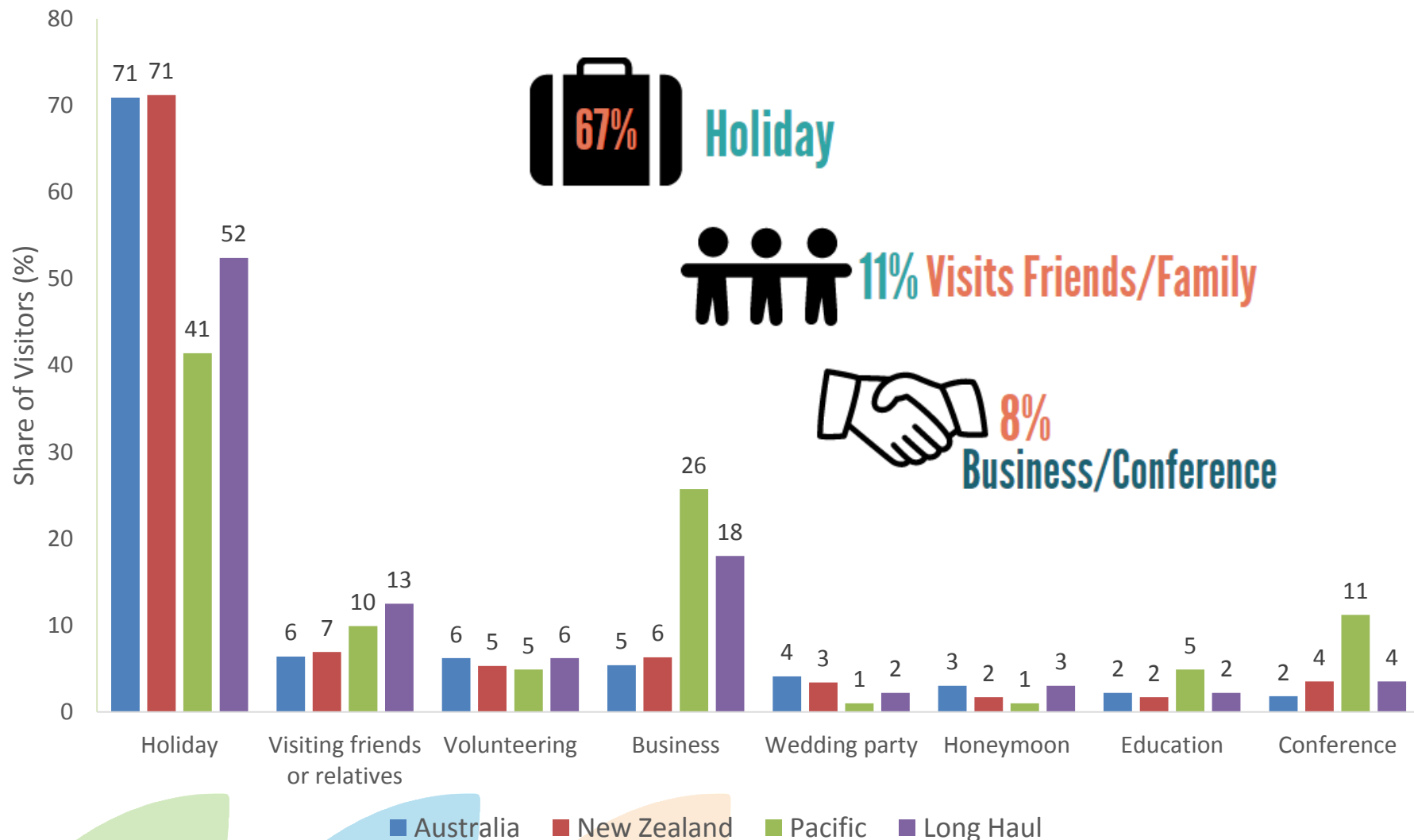
33% of Australians

22% of New Zealanders

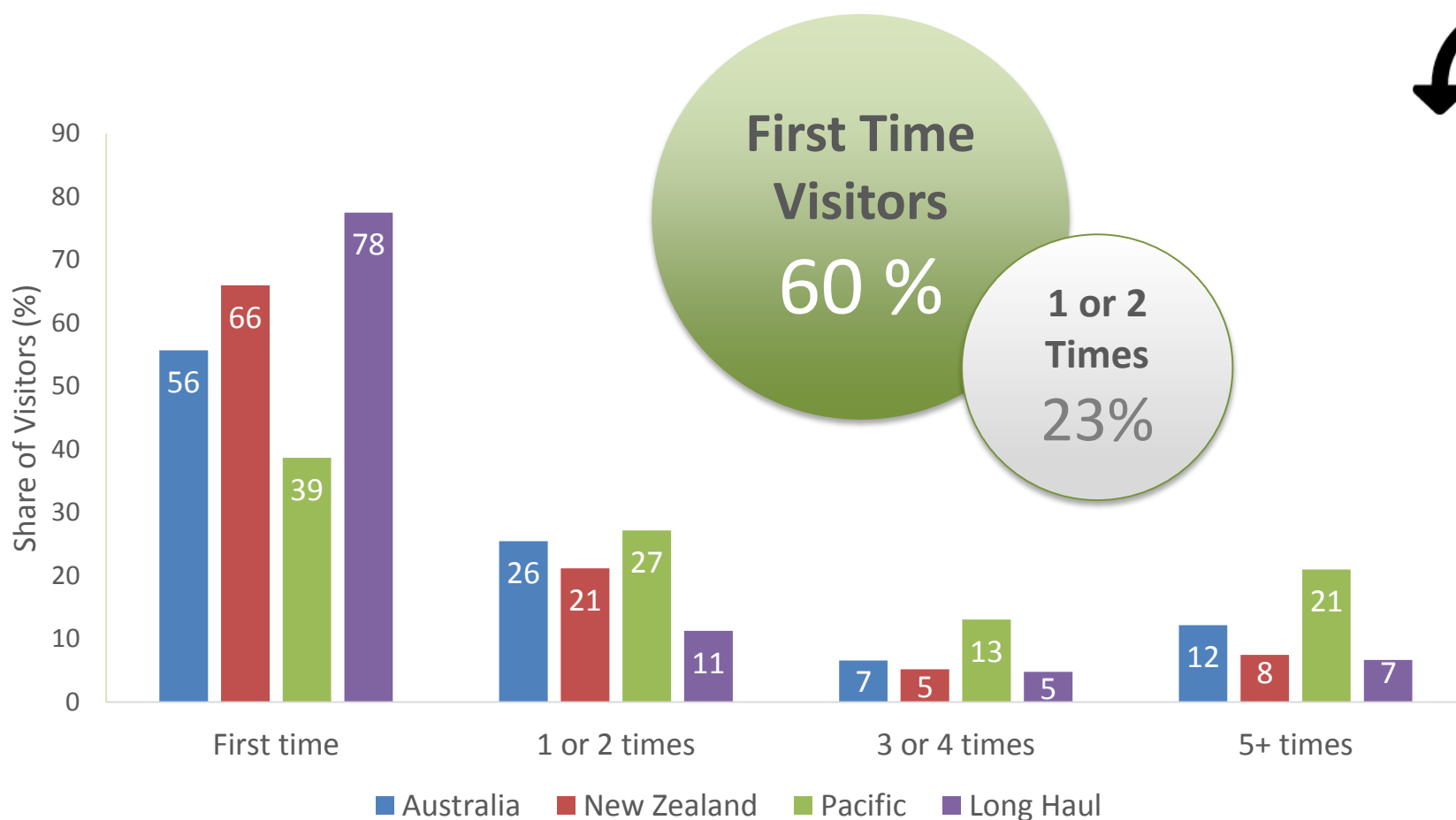
23% long haul countries

8% of Pacific visitors

# Main Purpose of Visit – country of origin

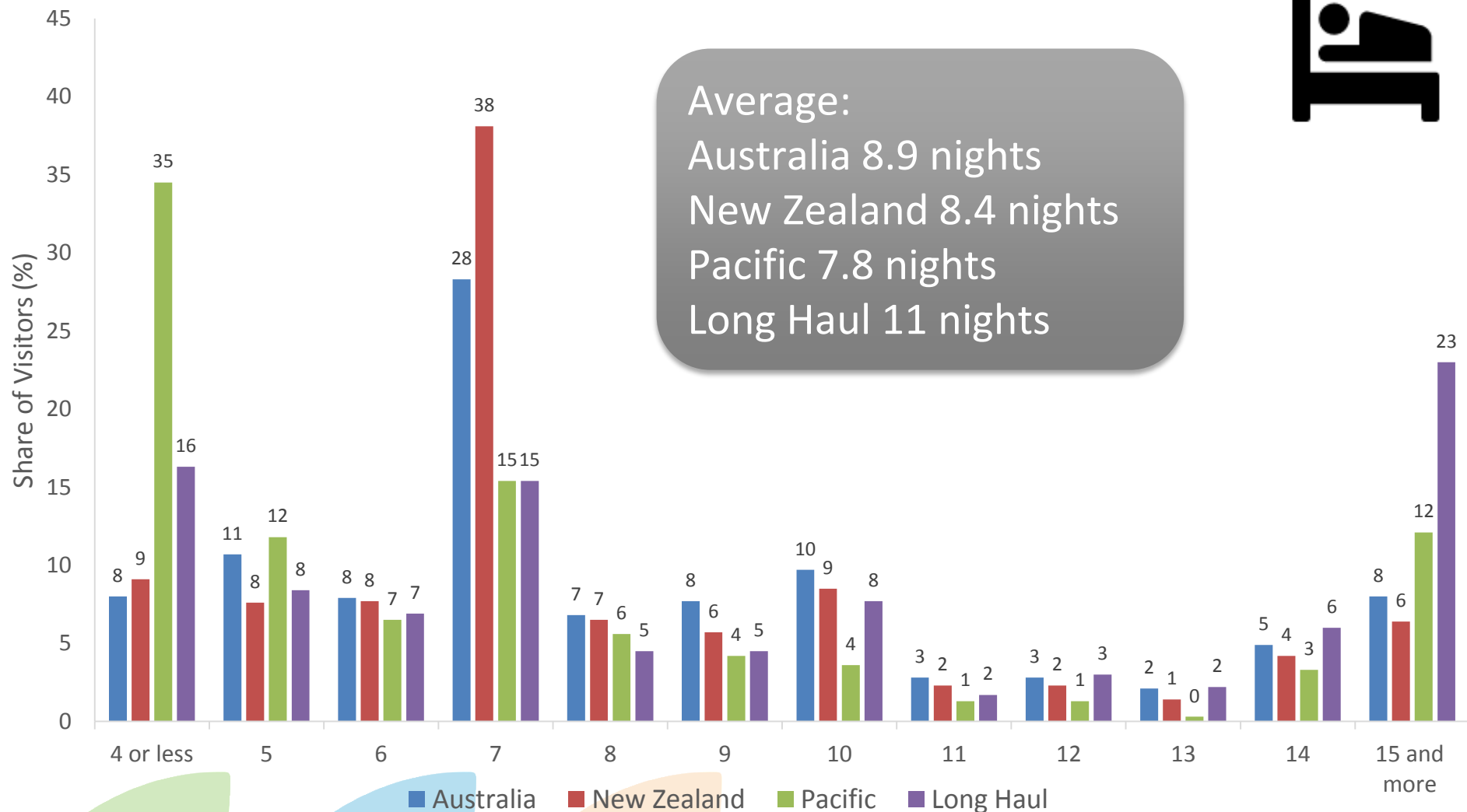


# Previous Visits – country of origin





# Length of Stay – country of origin



# Airlines Used for Travel



*Air Vanuatu*

47%



28%



australia

**AIR NEW ZEALAND**  20%

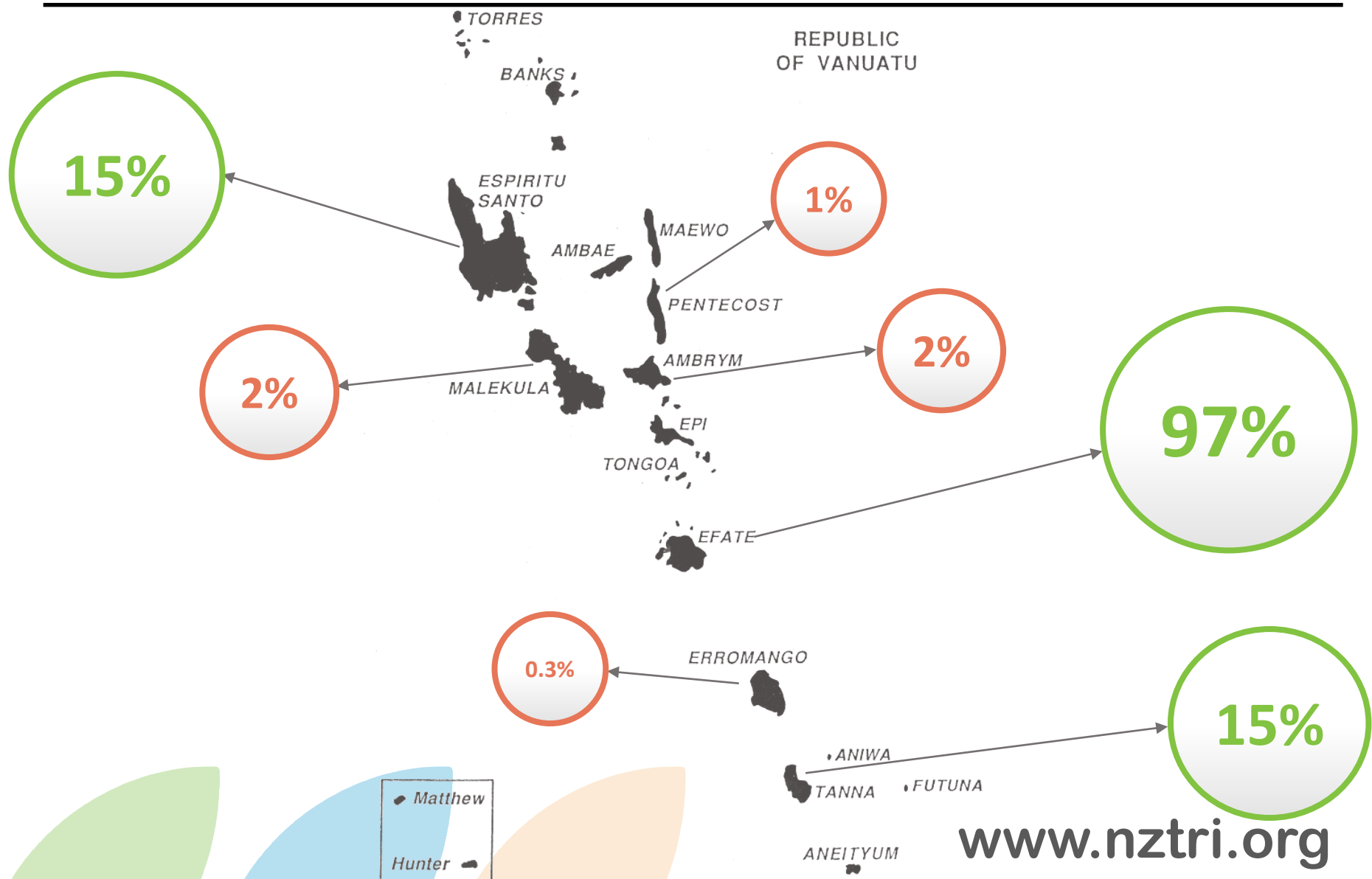


**FIJI**  
AIRWAYS

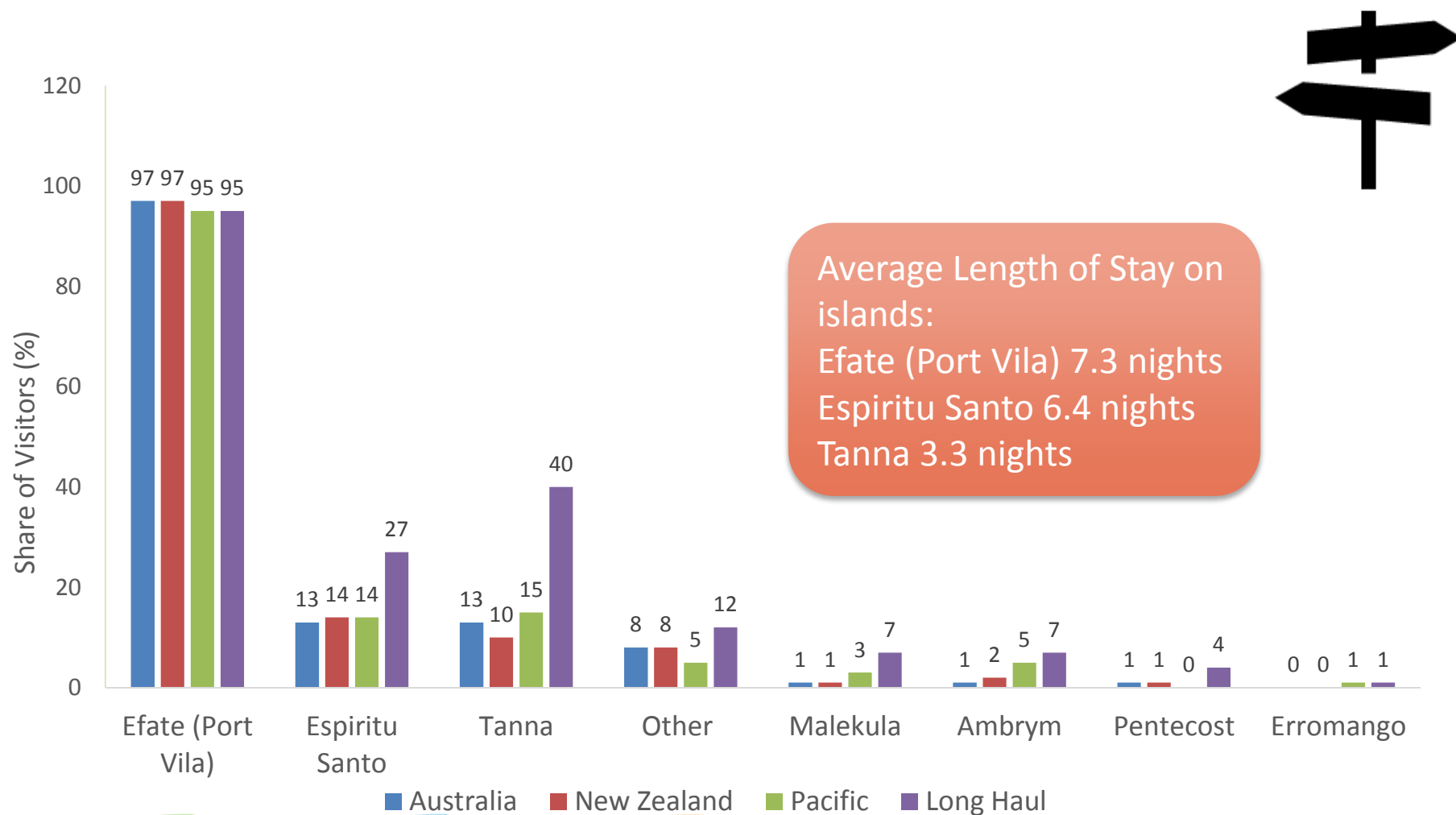


Fiji Airways and  
Aircalin are more  
commonly used  
by visitors from  
Pacific countries

# Outer Islands Visited



# Outer Islands Visited – country of origin







# ESPIRITU SANTO

## VISITOR PROFILE



18-29 YEARS	21%
30-39 YEARS	23%
40-49 YEARS	16%
50-59 YEARS	26%
60-69 YEARS	12%
70-79 YEARS	2%

AVERAGE  
ANNUAL  
INCOME  
**US\$101,617**



REPEAT  
VISITORS TO  
VANUATU **38%**

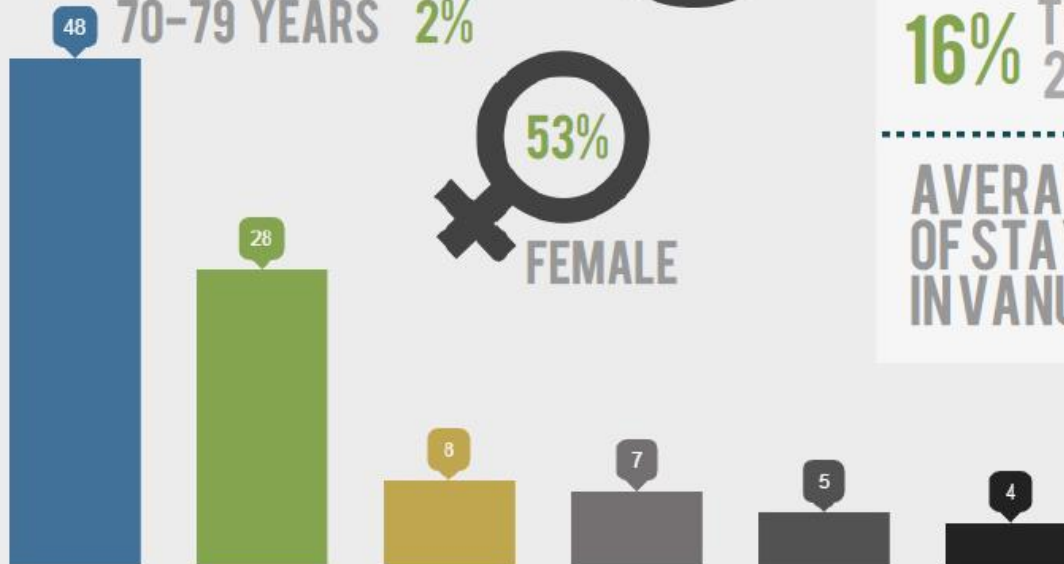
**41%** TRAVELS WITH  
1 COMPANION

**16%** TRAVELS WITH  
2 COMPANIONS

AVERAGE LENGTH  
OF STAY **12.4** NIGHTS  
IN VANUATU

**53%**  
FEMALE

- Australia
- New Zealand
- Europe
- Pacific
- North America
- Asia



## COUNTRY OF ORIGIN

# VISITOR PROFILE



## MALEKULA



18-29 YEARS	10%
30-39 YEARS	30%
40-49 YEARS	9%
50-59 YEARS	26%
60-69 YEARS	24%
70-79 YEARS	1%

AVERAGE  
ANNUAL  
INCOME  
**US\$135,205**



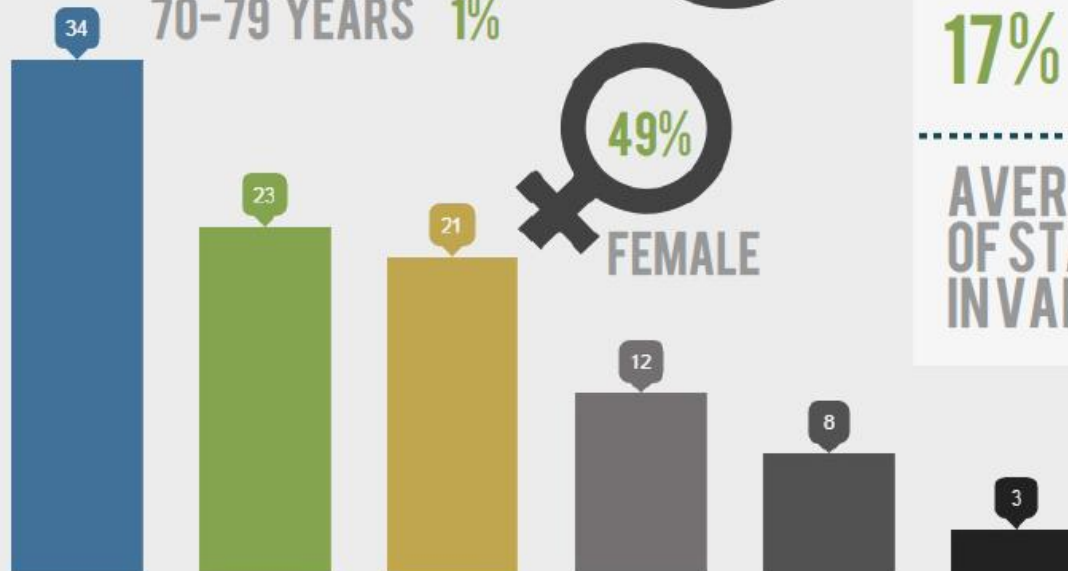
REPEAT  
VISITORS TO  
VANUATU **48%**

**42%** TRAVELS WITH  
1 COMPANION

**17%** TRAVELS WITH  
2 COMPANIONS

AVERAGE LENGTH  
OF STAY **17.1** NIGHTS  
IN VANUATU

- Australia
- Europe
- New Zealand
- Pacific
- North America
- Asia



## COUNTRY OF ORIGIN

# INFORMATION SOURCE USED FOR PLANNING

## ESPIRITU SANTO

FRIENDS/FAMILY 45%  
GENERAL TRAVEL WEBSITES 45%  
PREVIOUS VANUATU VISITS 32%

## TANNA

GENERAL TRAVEL WEBSITES 54%  
FRIENDS/FAMILY 40%  
VANUATU TOURISM WEBSITE 38%

## AMBRYM

FRIENDS/FAMILY 41%  
GENERAL TRAVEL WEBSITES 41%  
PREVIOUS VANUATU VISITS 34%

## MALEKULA

FRIENDS/FAMILY 54%  
PREVIOUS VANUATU VISITS 40%  
GENERAL TRAVEL WEBSITES 34%

## ESPIRITU SANTO

NATURE ATTRACTIONS  
BEACHES AND SWIMMING  
QUIET AND RELAXING ATMOSPHERE

3.6  
3.5  
3.5

## TANNA

NATURE ATTRACTIONS  
CULTURE AND HISTORY  
QUIET AND RELAXING ATMOSPHERE

4.2  
3.4  
3.3

## AMBRYM

NATURE ATTRACTIONS  
CULTURE AND HISTORY  
QUIET AND RELAXING ATMOSPHERE

4.1  
3.7  
3.0

## MALEKULA

CULTURE AND HISTORY  
NATURE ATTRACTIONS  
QUIET AND RELAXING ATMOSPHERE

3.7  
3.6  
3.0

# INFLUENTIAL DECISION MAKING FACTORS (OUT OF 5)

	Just Efate (n=3210)	Santo visitors (n=692)	Tanna visitors (n=698)	Ambrym visitors (n=84)	Malekula visitors (n=92)
Average length of stay in Vanuatu	7.9 nights	12.4 nights	10.9 nights	16.3 nights	17.1 nights
Average spend per person per day - in country (per visit)	\$85 (\$671.50)	\$85 (\$1054)	\$87 (\$948.30)	\$54 (\$880.20)	\$58 (\$991.80)



# How did you find out about Vanuatu?

## Rank 1

Friends and family	36%
Previous experience	30%
General travel websites	14%

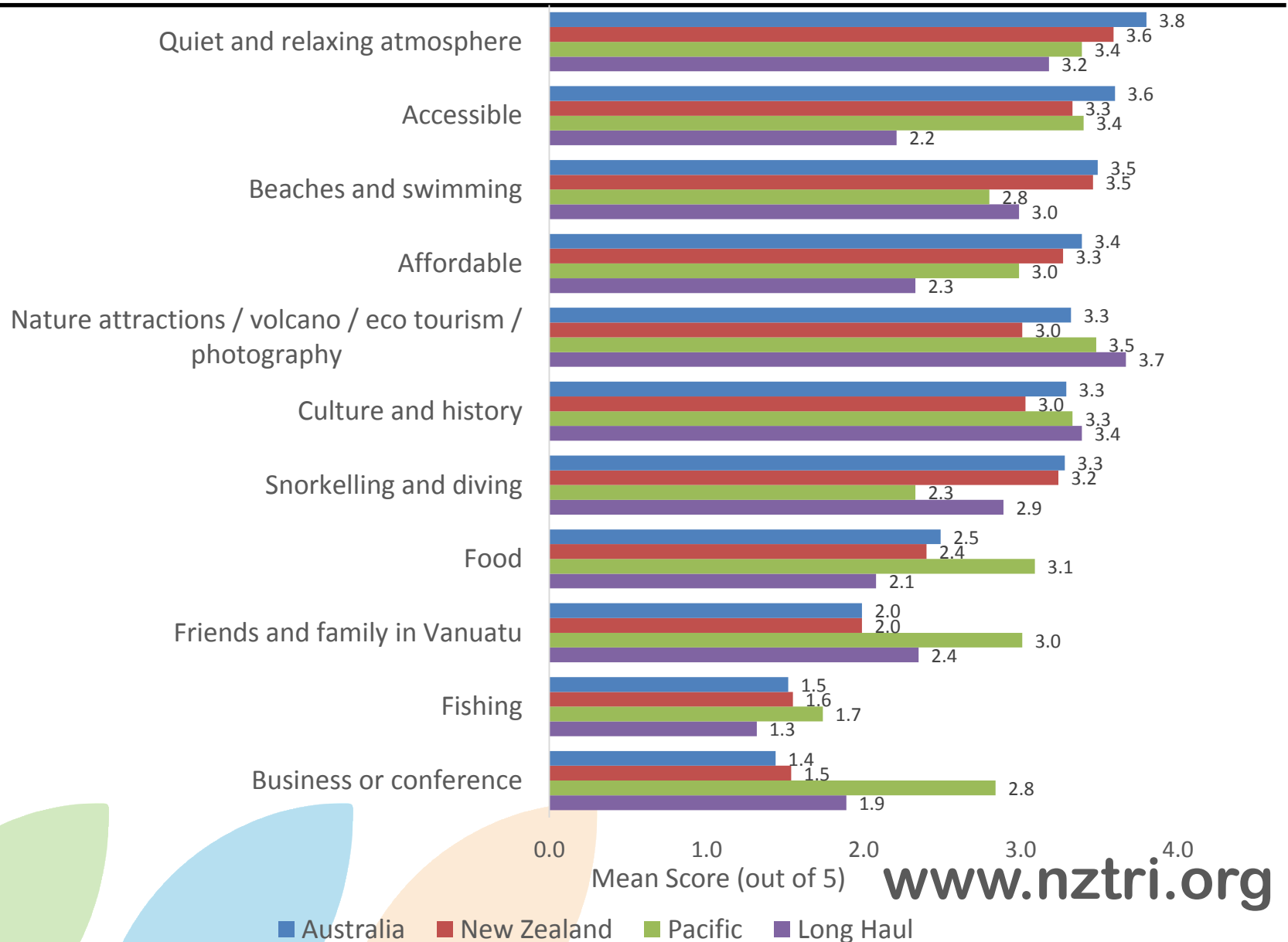
## Rank 2

Friends and family	25%
General travel websites	20%
Travel agent/brochures	16%

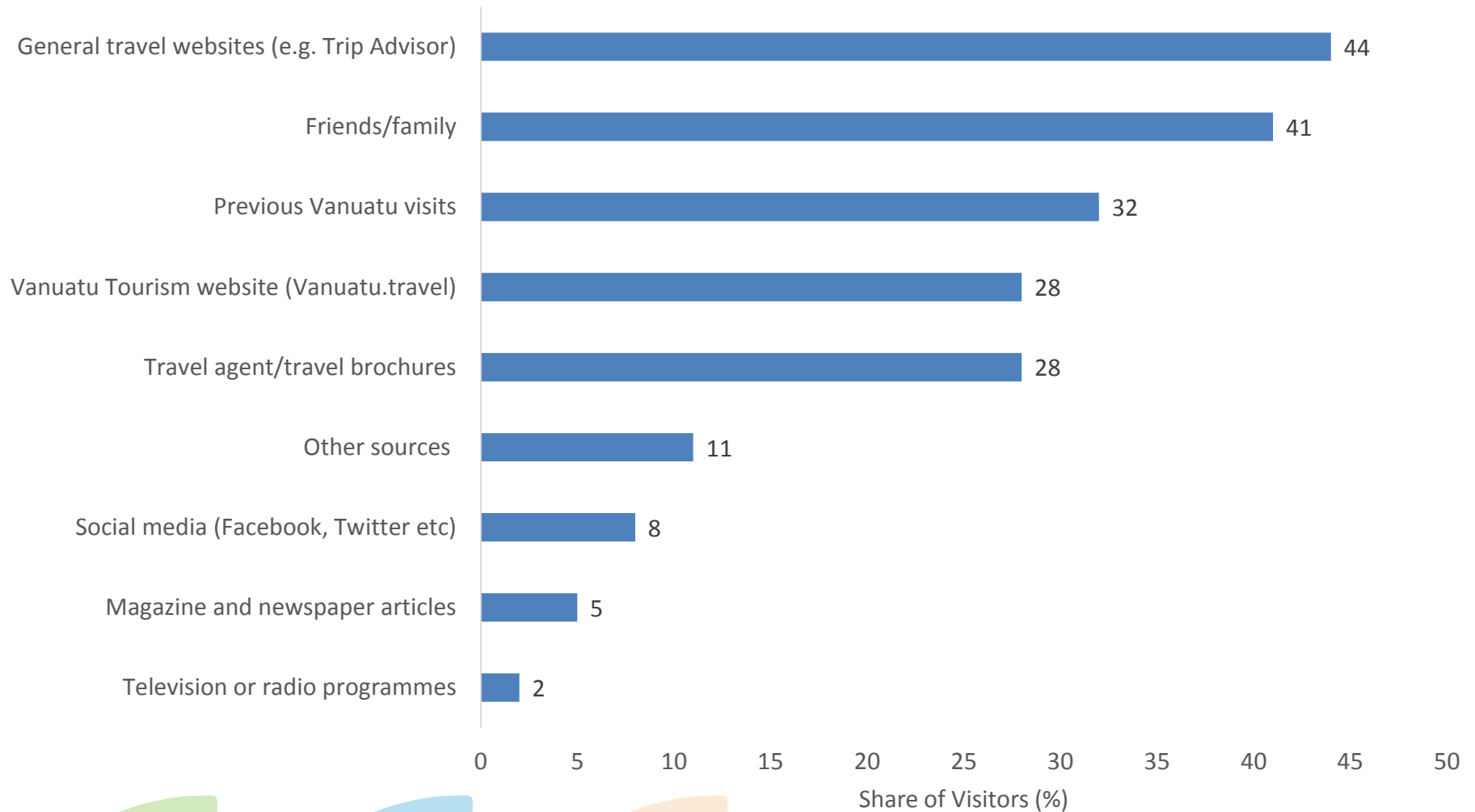
## Rank 3

General travel websites	23%
Vanuatu travel website	17%
Travel agent/brochures	15%

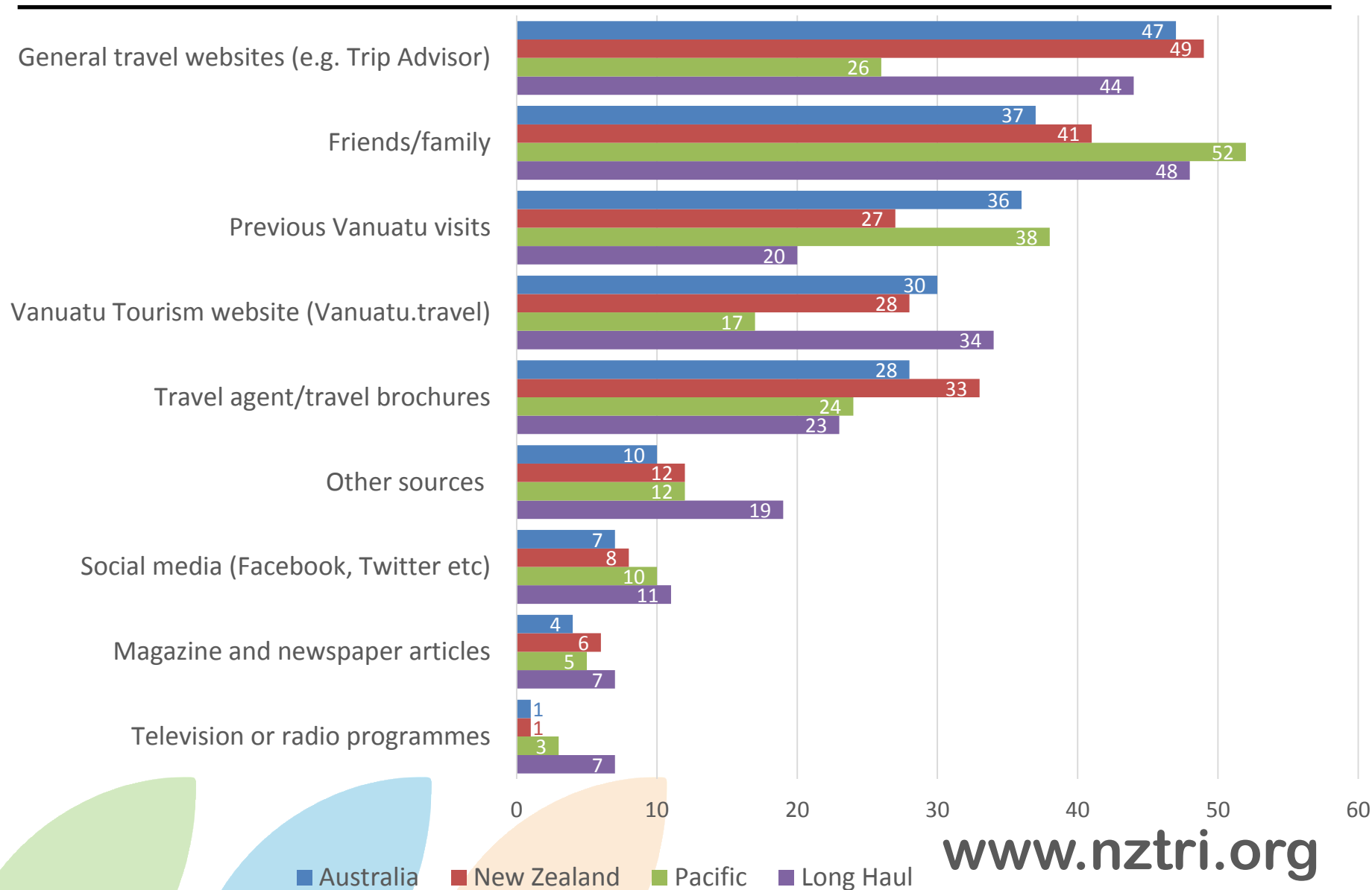
# Influences on decision-making – country of origin



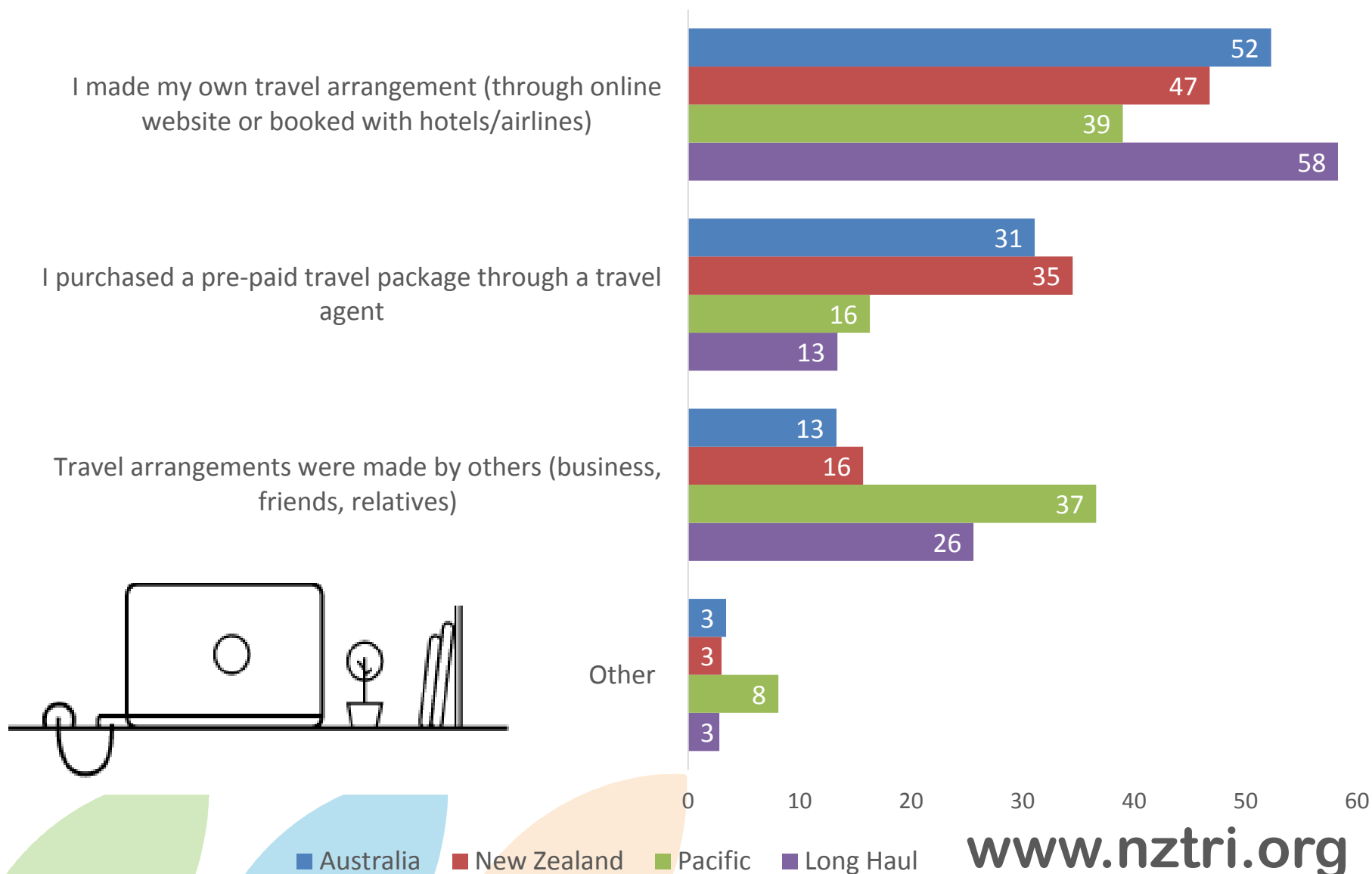
# Important sources used for planning



# Source used for planning – country of origin



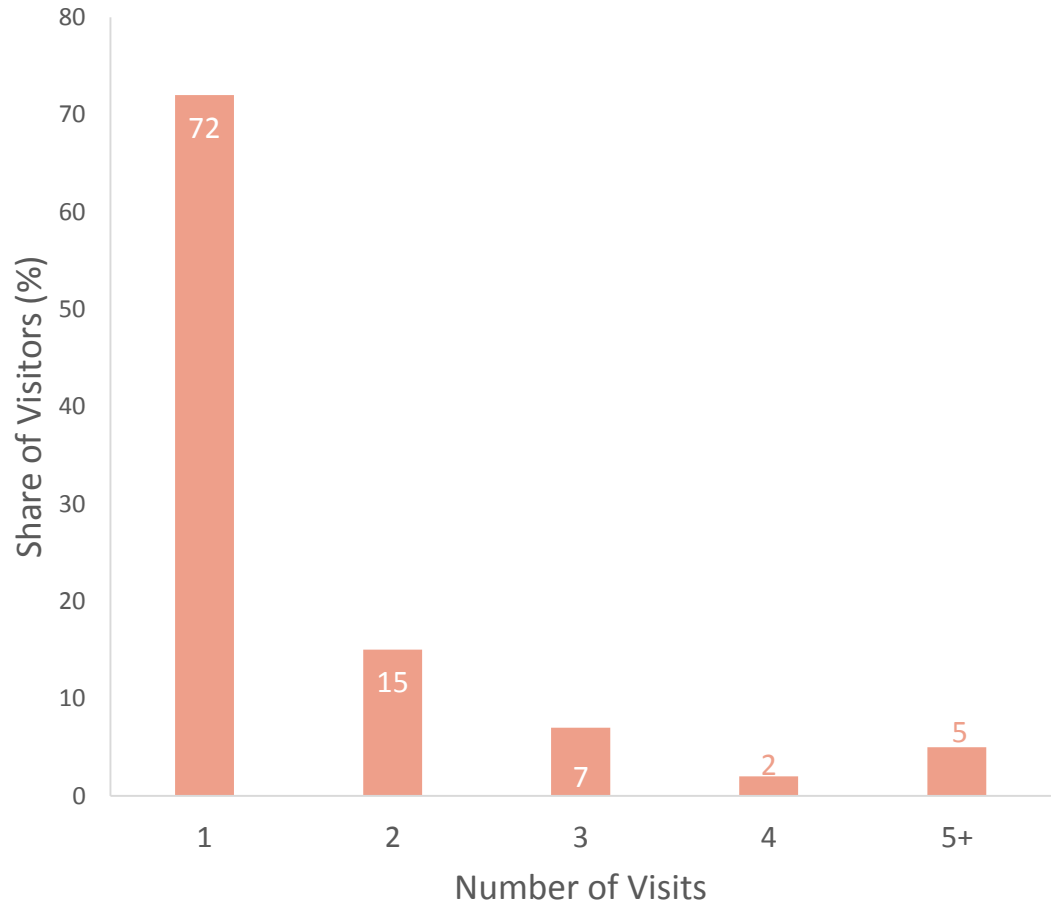
# Travel Purchasing Behaviour – country of origin



# Previous Cruise Visitors



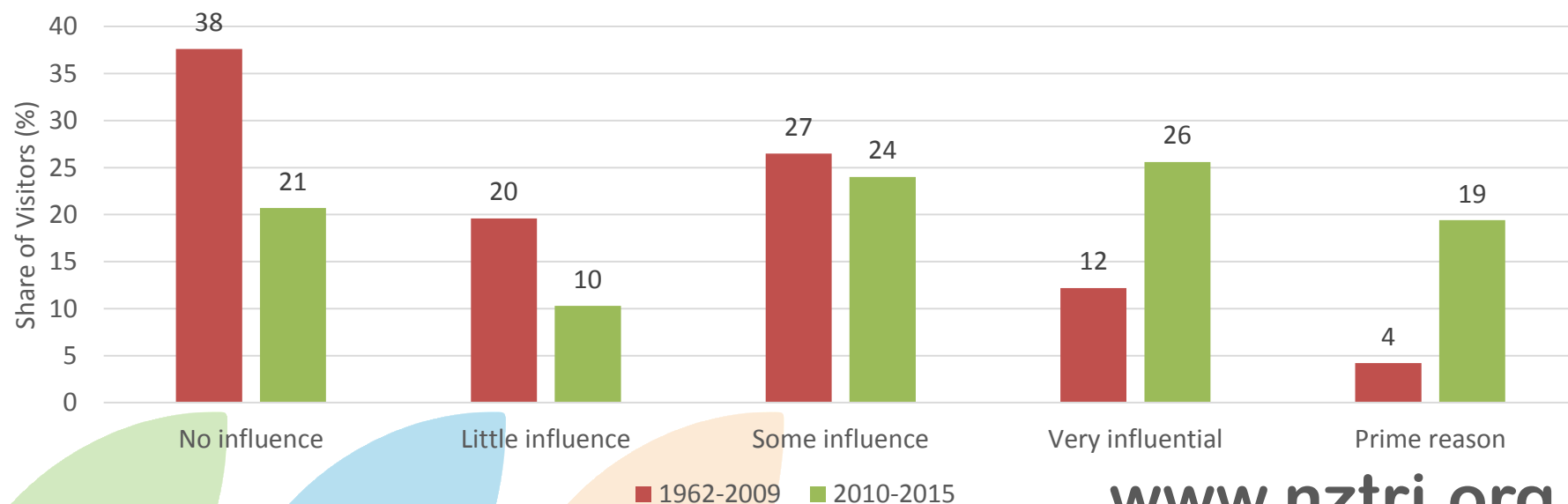
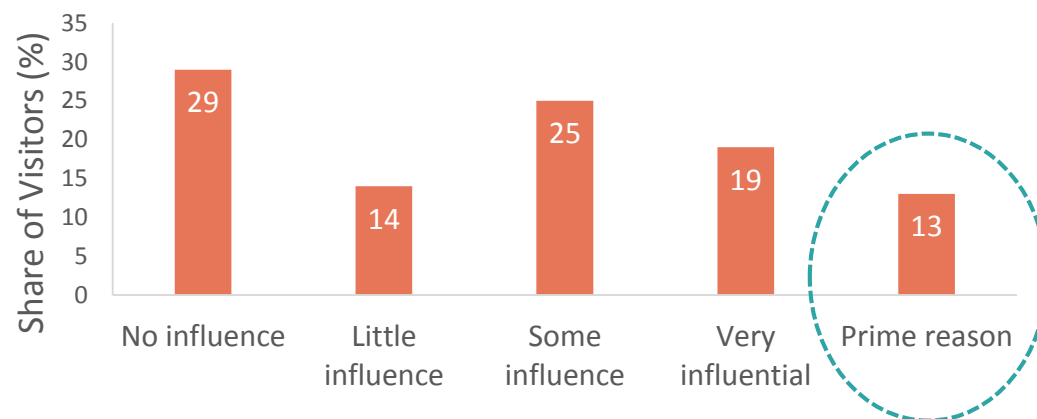
**10%** of  
visitors have  
been to  
Vanuatu  
previously  
on a cruise



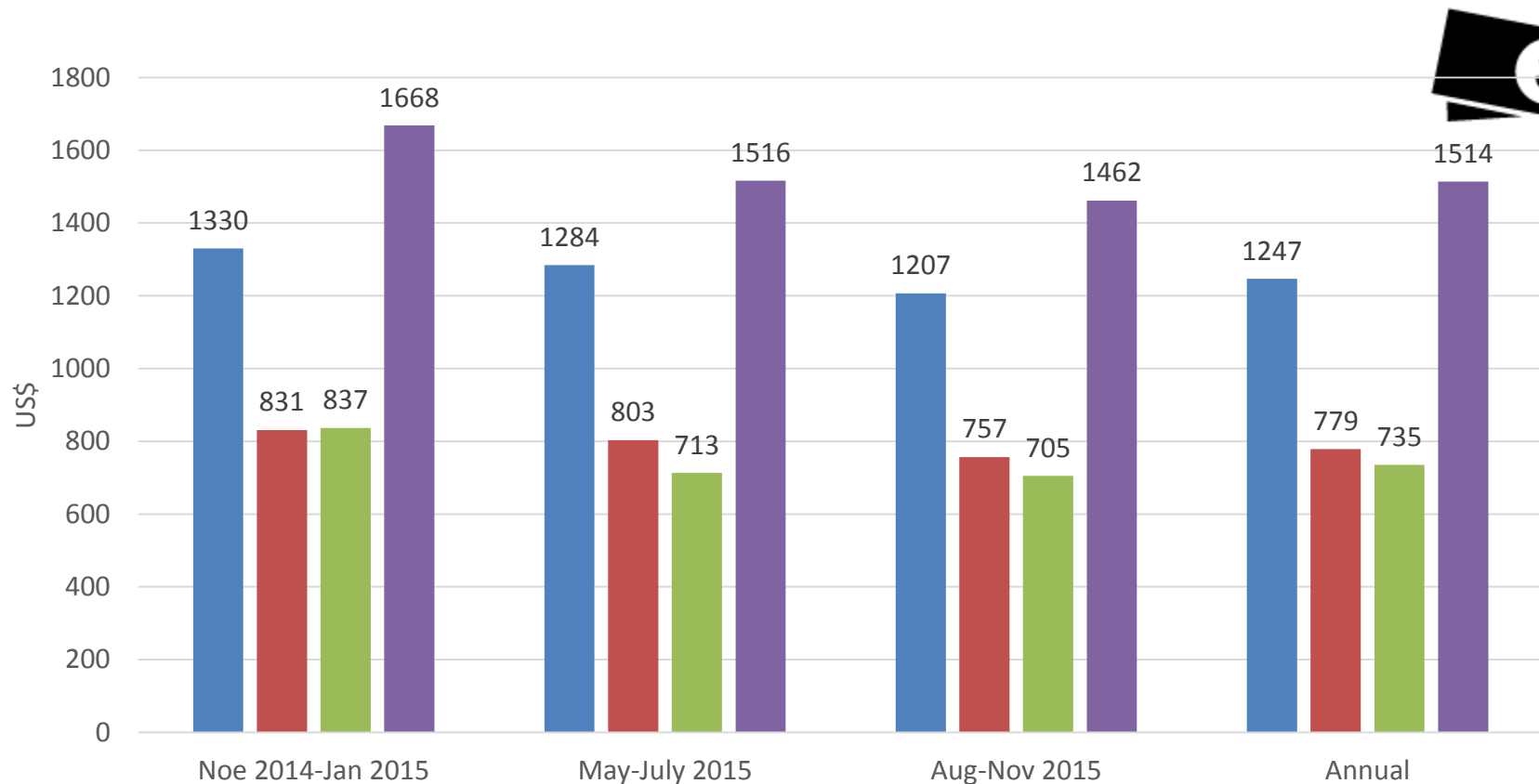


# Cruise Influence on recent air visit

The more recently a cruise was taken, the greater the degree of influence exerted on return travel decisions

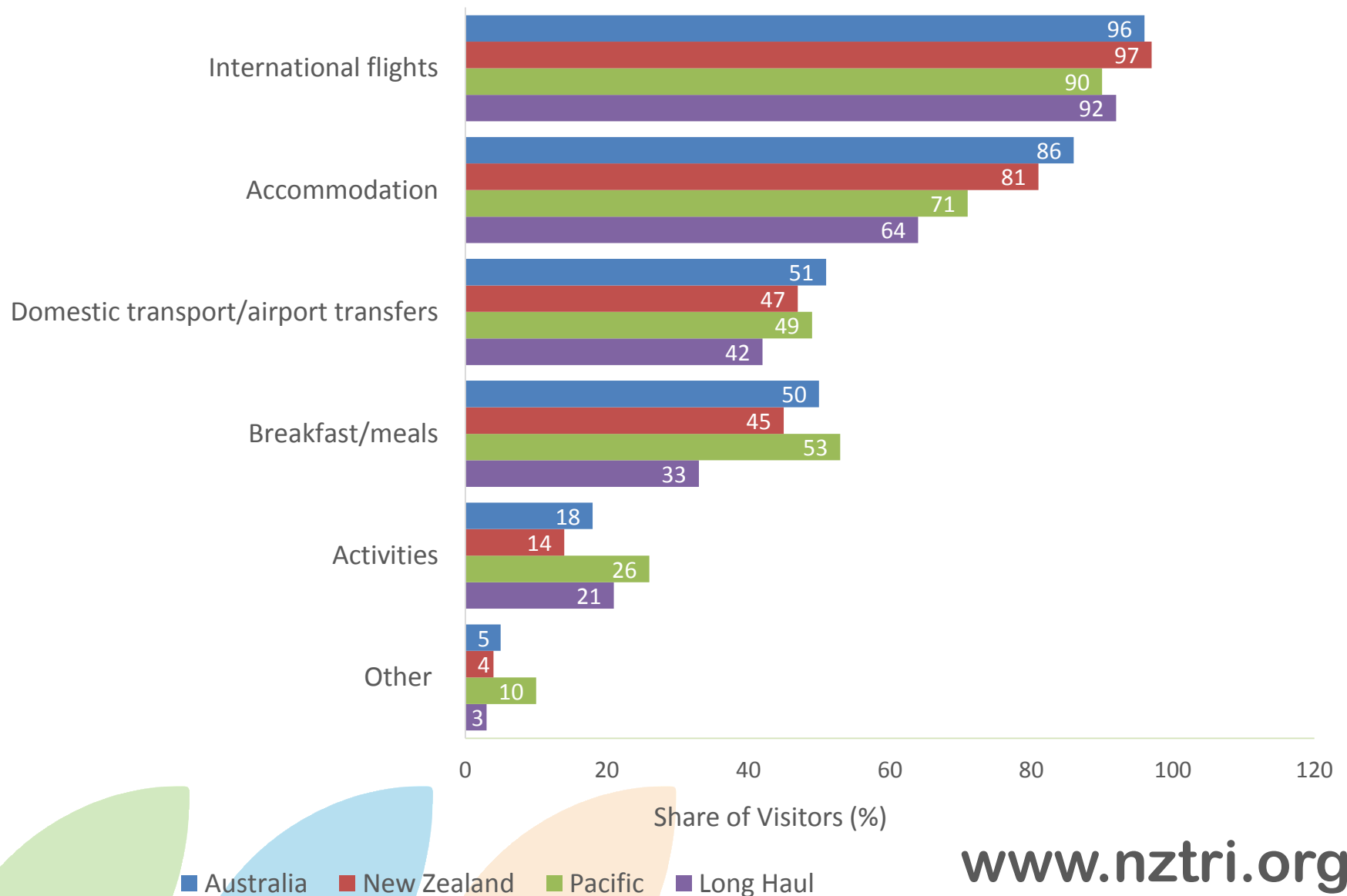


# Visitor Expenditure – seasonal trends (per person per visit)

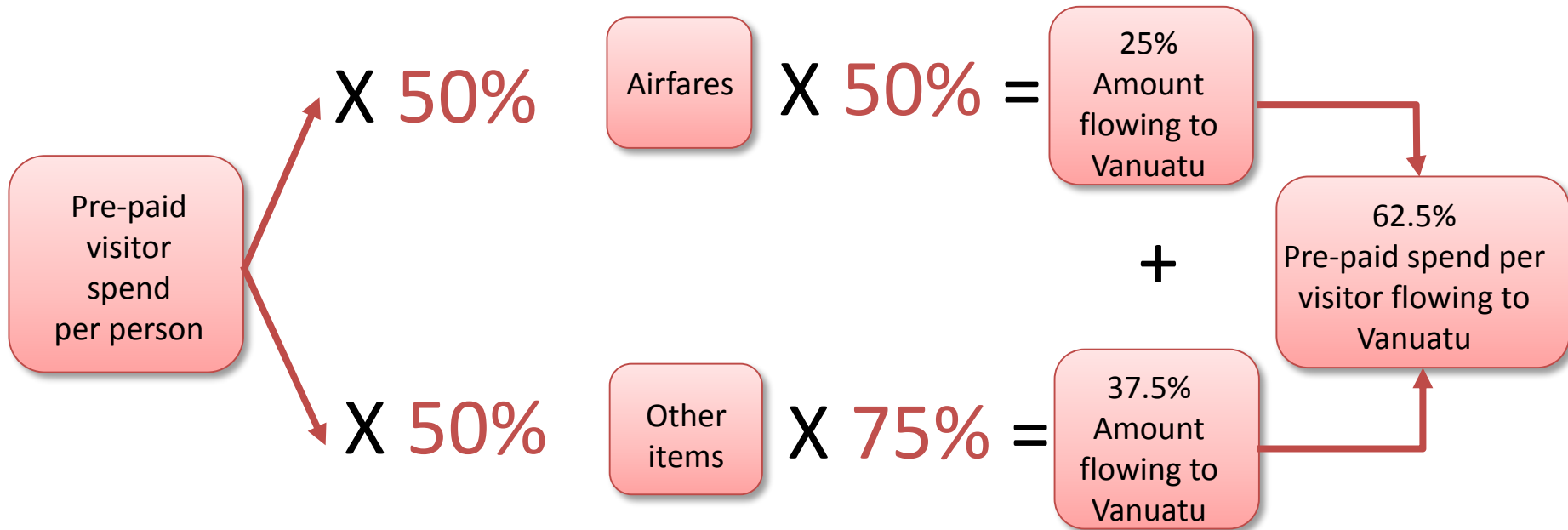


- Average spend before visiting
- Prepaid spend flowing into the local economy
- Average spend while in Vanuatu
- Total spend per visit flowing back into Vanuatu economy

# Prior to arrival Expenditure Details



# Visitor Expenditure Prior to Arrival



# Visitor Expenditure – prior to arrival (directly reaching Vanuatu)



## Visitor Expenditure

Pre-Trip

Average spend before visiting

**\$ 1 2 4 7** per person

**62.5%** Of the pre-paid spend flows back into the Vanuatu economy



International flights **96%**

Accommodation **81%**

**\$ 7 7 9**

per person flowing into local economy

**VUV 86,556**

# Visitor Expenditure – while staying in Vanuatu

## Visitor Expenditure

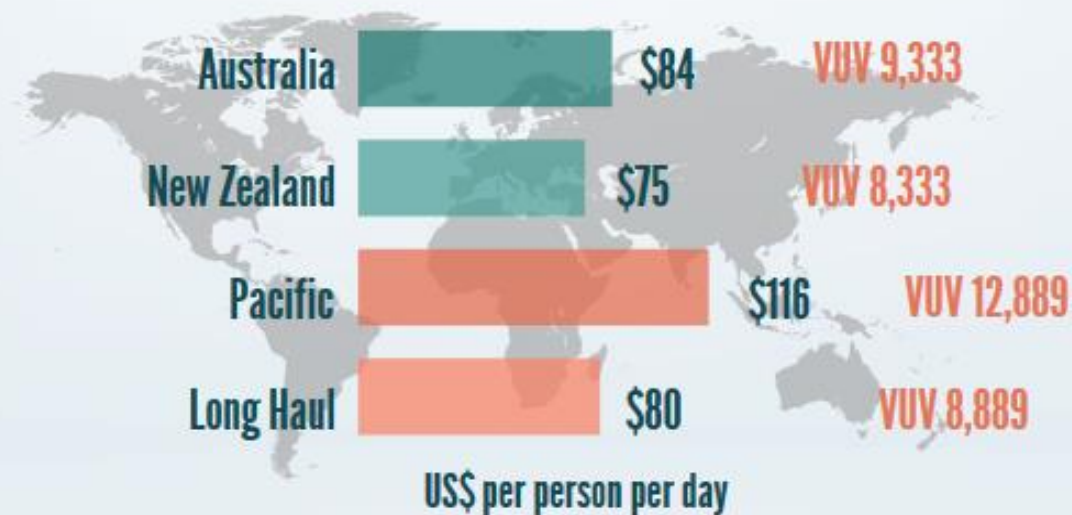
During Trip

Average spend while in Vanuatu



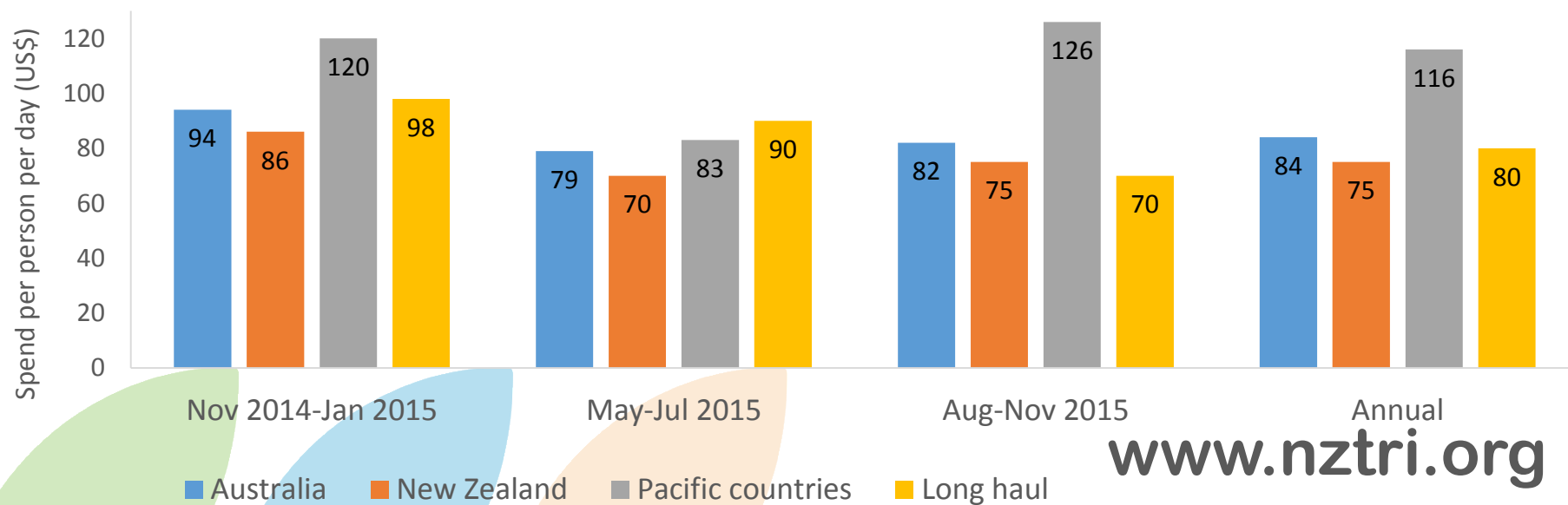
**\$ 735** per person **VUV 81,667**

**\$83** per person per day **VUV 9,222**



# Average local spend per person – country of origin

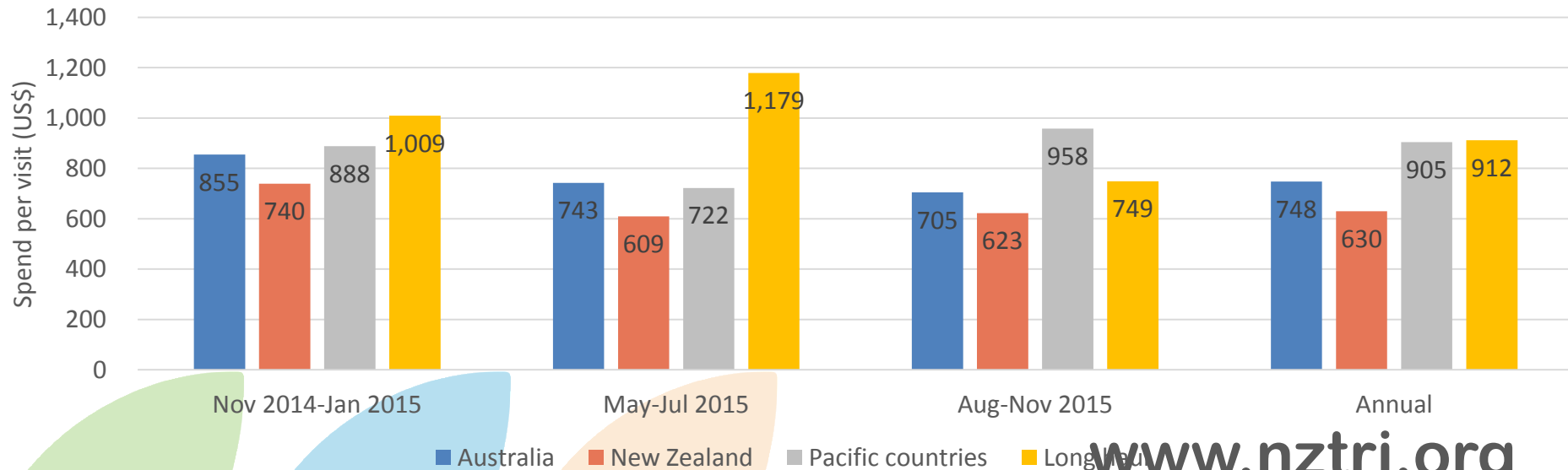
	Australia	New Zealand	Pacific countries	Long haul
<b>Nov 2014-Jan 2015</b>	\$94	\$86	\$120	\$98
<b>May-Jul 2015</b>	\$79	\$70	\$83	\$90
<b>Aug-Nov 2015</b>	\$82	\$75	\$126	\$70
<b>Annual</b>	\$84	\$75	\$116	\$80





# Average local spend per visit – country of origin

	Australia	New Zealand	Pacific countries	Long haul
<b>Nov 2014-Jan 2015</b>	\$855	\$740	\$888	\$1,009
<b>May-Jul 2015</b>	\$743	\$609	\$722	\$1,179
<b>Aug-Nov 2015</b>	\$705	\$623	\$958	\$749
<b>Annual</b>	\$748	\$630	\$905	\$912



# Expenditure details while in Vanuatu

<b>Expenditure Items</b>	<b><i>Mean (US\$)</i></b>	<b><i>(% of spend)</i></b>
Food and beverage (restaurant, café)	26	31
Accommodation	20	25
Tours/tour operator services	7	9
Supermarket/general store items	6	7
Domestic travel within Vanuatu (air travel, ferry)	6	7
Taxis/bus/car hire	5	7
Handicraft, souvenirs, artwork	3	3
Entertainment activities/casinos	2	3
Duty free shop (alcohol, tobacco, cosmetics)	2	3
Purchases of clothing (incl. T shirt)	2	2
Local food from the market	1	2
Services (e.g. massage, hairdressing, spa)	1	2
Internet and telecommunication	1	1
Purchases of watches & jewellery	1	1
<b>Total expenditure per person per day</b>	<b>83</b>	<b>100%</b>

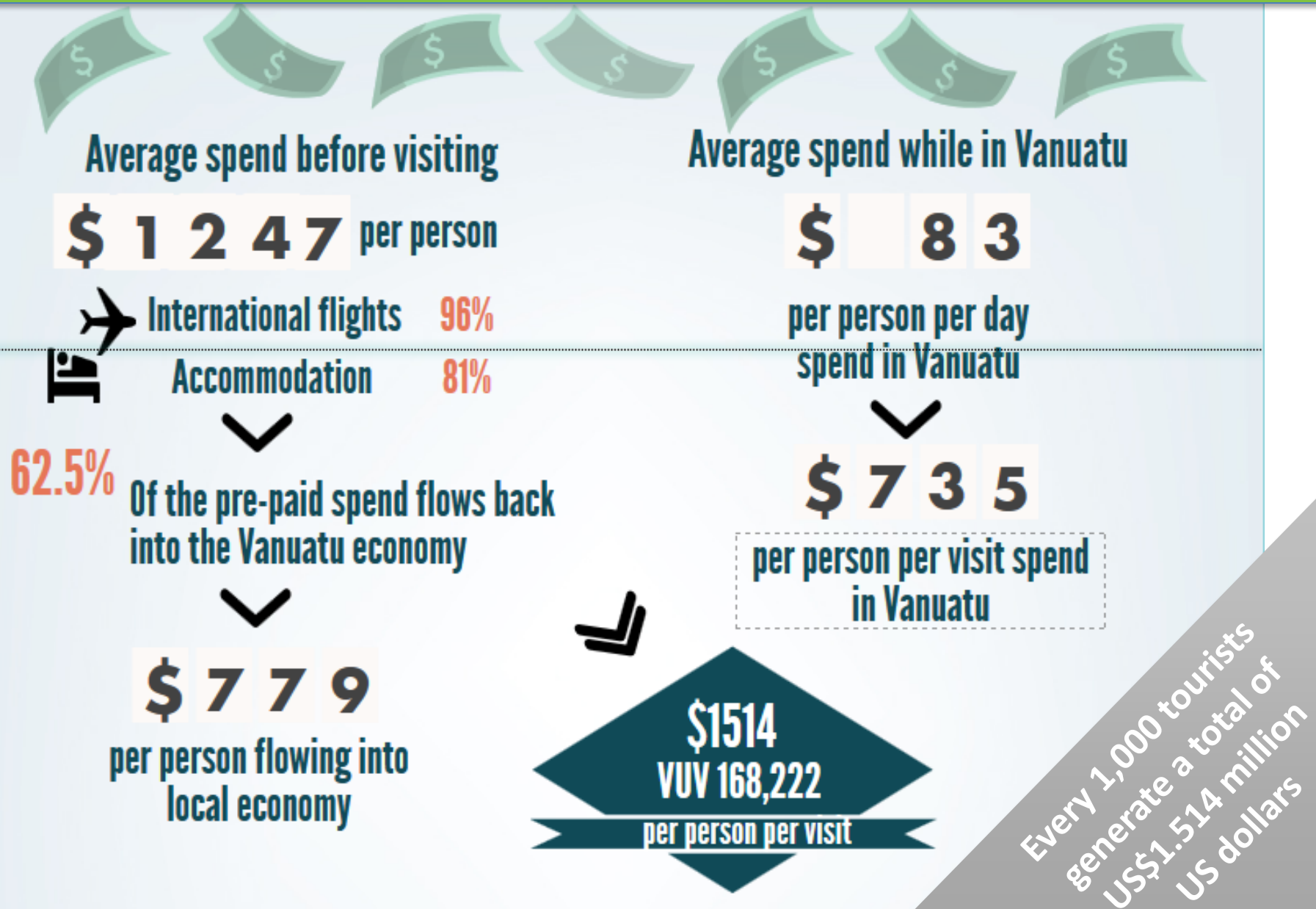
# Expenditure while in Vanuatu – country of origin

Expenditure Items	Australia n=4555	New Zealand n=2394	Pacific n=482	Long haul n=577
Food and beverage (restaurant, café)	28	25	23	18
Accommodation	20	17	31	28
Tours/tour operator services	8	7	4	6
Supermarket/general store items	6	5	8	4
Taxis/bus/car hire	5	6	8	5
Domestic travel within Vanuatu (air travel, ferry)	5	4	14	11
Handicraft, souvenirs, artwork	3	2	7	2
Duty free shop (alcohol, tobacco, cosmetics)	3	2	4	0
Entertainment activities/casinos	2	2	5	2
Purchases of clothing (incl. T shirt)	2	2	4	1
Services (e.g. massage, hairdressing, spa)	2	1	1	0
Local food from the market	1	1	3	1
Internet and telecommunication	1	1	3	1
Purchases of watches & jewellery	1	1	1	1
<b>Total spend (US\$)</b>	<b>\$84</b>	<b>\$75</b>	<b>\$116</b>	<b>\$80</b>

# Average spend (total) – country of origin

	Australia	New Zealand	Pacific countries	Long haul	Annual
Average length of stay (nights)	8.9	8.4	7.8	11.4	8.9
Pre arrival Spend per person (US\$)	\$1,241	\$1,081	\$1,122	\$1,945	\$1,247
Pre arrival Spend per person per day (US\$)	\$139	\$129	\$144	\$170.61	\$140.11
Pre arrival spend flowing to Vanuatu per person per day (US\$) (62.5%)	\$87	\$80	\$90	\$107	\$88
Spend while in Vanuatu per person per day (US\$)	\$84	\$75	\$116	\$80	\$83
Expenditure in-country and pre-arrival spend reaching Vanuatu - per person per day (US\$)	\$171	\$155	\$206	\$187	\$171
Expenditure in-country and pre-arrival spend reaching Vanuatu per person per day (VUV)	19,017	17,270	22,878	20,737	18,952

# Visitor Expenditure (per visit)



# Total Direct Economic Impact

**\$150  
Million**

VUV 17 billion

**The Vanuatu economy**

**US\$1,514 per visitor**

**99,115 arrivals**



# Visitor Satisfaction - overview

## Overall Satisfaction



51%  
34%

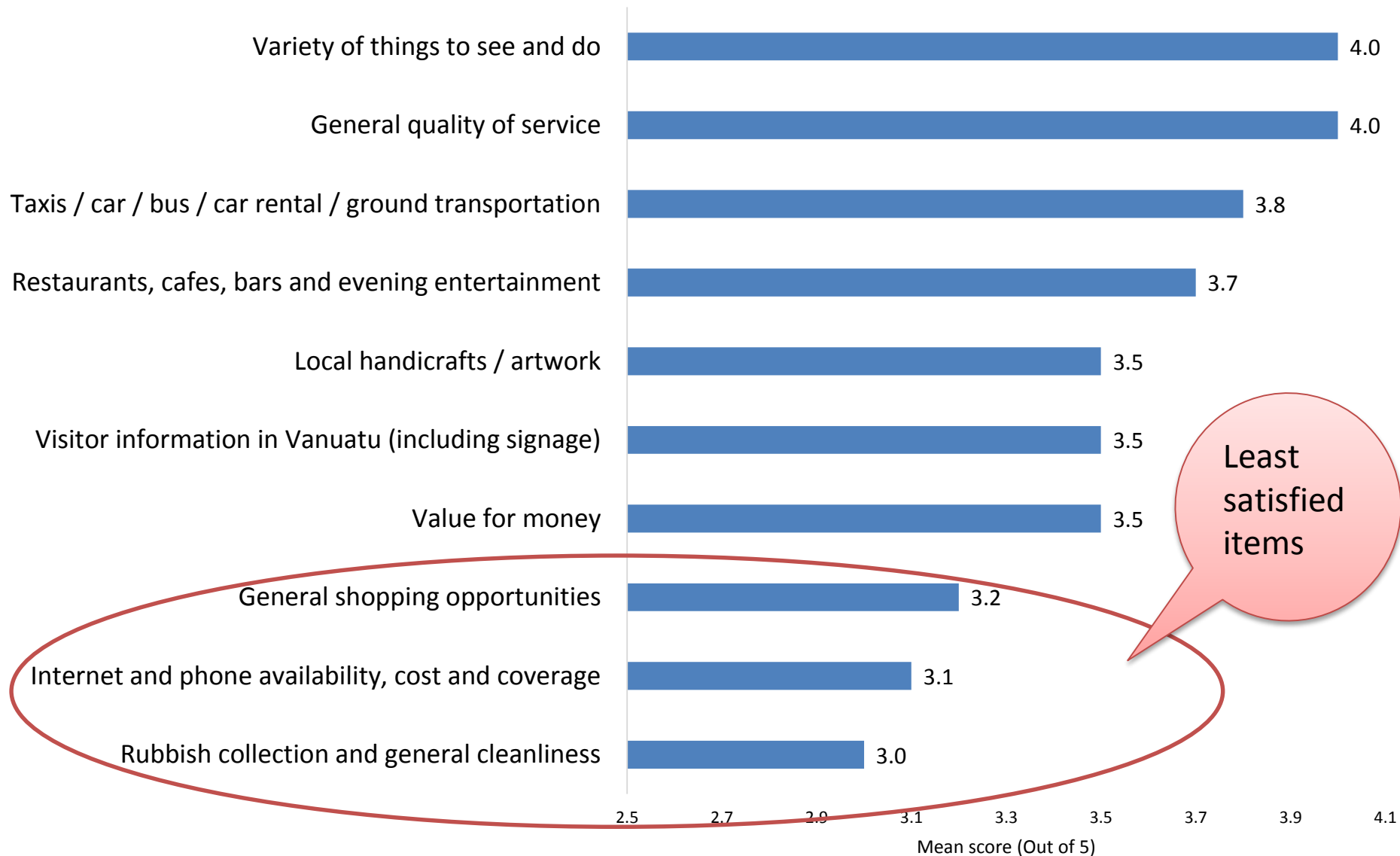
Very satisfied  
Satisfied



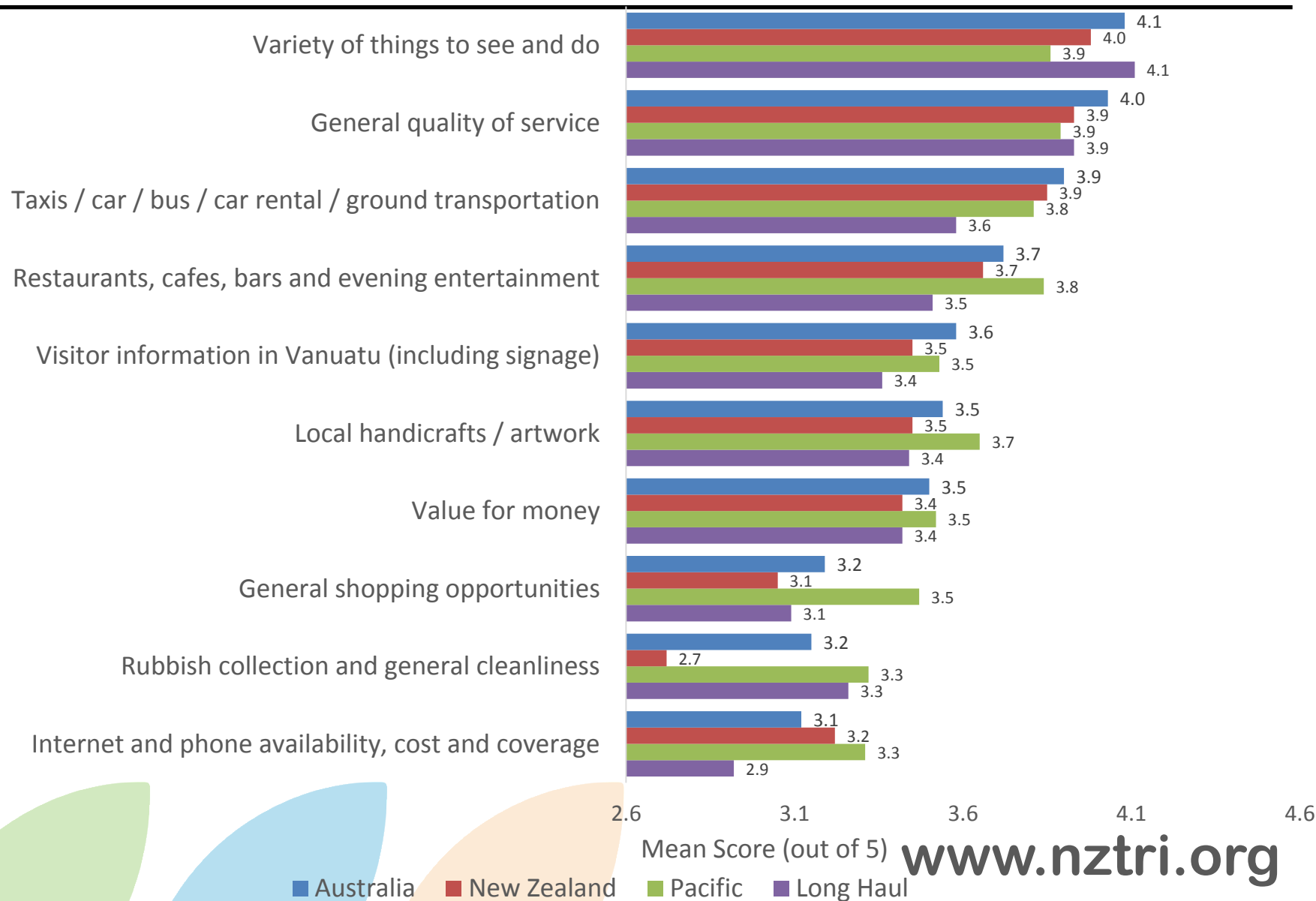
Comparison	Nov 2014- Jan 2015	May-Jul 2015	Aug-Nov 2015	Annual
<b>Overall satisfaction</b>				
<b>Very satisfied:</b>	48%	57%	51%	51%
<b>Satisfied:</b>	36%	32%	34%	34%
<b>Level of satisfaction</b>				
<b>Variety of things to see and do:</b>	4.0	4.1	4.0	4.0
<b>General quality of service:</b>	3.9	4.0	4.0	4.0
<b>Taxis/car/bus/car rental:</b>	3.6	3.9	3.9	3.8
<b>Restaurants/cafes/bars/evening         entertainment:</b>	3.7	3.7	3.7	3.7



# Degree of Satisfaction



# Degree of Satisfaction



# Visitor Satisfaction

## Most Appealing Factors



# Most Appealing Aspects – seasonal

Comparison	Nov 2014- Jan 2015	May-Jul 2015	Aug-Nov 2015	Annual
Local people	46%	59%	55%	54%
Environment	37%	28%	30%	31%
Activities, attractions and entertainment, events	39%	30%	29%	29%
Atmosphere	12%	12%	14%	13%
Accommodation	9%	6%	8%	8%
Food and Beverage	9%	6%	7%	7%
Culture, shopping and history	6%	5%	7%	6%
Level of service	8%	4%	5%	5%
Convenience	5%	3%	3%	3%
Overall good experience	4%	1%	2%	2%
Safety, family-friendly	2%	2%	2%	2%
Un-commercial	4%	2%	1%	2%
Value for money	2%	1%	1%	1%

# Most Appealing Aspects – market

Comparison	Australia	New Zealand	Pacific	Long Haul
Local people	52%	54%	36%	47%
Environment	37%	38%	29%	43%
Activities, attractions and entertainment, events	32%	26%	31%	42%
Atmosphere	14%	11%	7%	5%
Accommodation	11%	7%	7%	4%
Level of service	9%	9%	12%	3%
Food and Beverage	8%	11%	14%	6%
Overall good experience	6%	3%	2%	1%
Culture and history	5%	7%	13%	10%
Convenience	4%	7%	4%	3%
Un-commercial	3%	3%	0	8%
Safety	2%	3%	2%	0
Value for money	2%	2%	7%	3%

# Visitor Disatisfaction

## Least Appealing Factors





# Least Appealing Aspects – seasonal

Comparison	Nov 2014- Jan 2015	May-Jul 2015	Aug-Nov 2015	Annual
Public services and facilities	23%	28%	27%	26%
Rubbish, cleanliness and natural environment care	21%	21%	21%	21%
Price of goods and services	18%	15%	17%	17%
Food and beverage	11%	10%	13%	12%
Local people, standard of service	10%	4%	9%	8%
Rental cars or scooters, transport	10%	6%	6%	7%
Attractions and activities	11%	3%	6%	6%
Cyclone Pam	n/a	11%	5%	6%
Accommodation	7%	4%	5%	5%
Shops	5%	3%	4%	4%
Social divide, social issues	3%	4%	5%	4%
Flight related issues	2%	2%	4%	3%
Too touristy	1%	1%	5%	3%
Weather	3%	4%	3%	3%
Cruise ships	4%	1%	1%	2%
Safety-related issues	1%	2%	2%	2%
Stray animals and mosquitos, diseases	4%	1%	2%	2%

# Least Appealing Aspects – markets

	Australia	New Zealand	Pacific	Long Haul
Public services and facilities	21	22	18	22
Price of goods and services	21	15	21	19
Rubbish, cleanliness and natural environment care	21	30	15	23
Food and beverage	15	11	1	13
Local people, standard of service	10	14	6	10
Rental cars or scooters, transport	10	9	13	10
Attractions and activities	9	9	12	9
Accommodation	7	6	4	7
Shopping experience	5	4	12	5
Social divide, social issues	5	6	4	5
Cruise ships	4	2	0	3
Flight related issues	3	3	8	4
Cyclone Pam	2	2	1	2
Stray animals and mosquitos, diseases	2	6	0	3
Weather	2	2	3	2
Safety-related issues	2	1	0	2

# Least Appealing Aspects of Vanuatu

*All the rubbish that was everywhere. Lots of plastic bottles and plastic bags, tins just a lot of rubbish. Couldn't believe it really."*

*"The rubbish on the ground, on the beach and in the water. 100% effort should be put into keeping this little bit of paradise clean and safe for the local people and visitors. Plastic bags should be banned on the island and also plastic drink straws. They end up in the ocean and harm the wildlife, it's so sad to see."*

*"They definitely need assistance with recycling initiatives, incentives and education."*



# Least Appealing Aspects of Vanuatu

*"Cost of attractions. Everything seemed to have a cost to enter which meant we didn't do some things. Cost of food meant we self-catered most of the time."*

*"It is very expensive to holiday in Vanuatu considering a lot of the country is in poverty and there is no infrastructure or proper roads in some islands. The supermarkets were almost more expensive than the supermarkets in Sydney, the food value for money wasn't good. I wish there were more local businesses and Ni-Vans living sufficiently."*

*"Value for money. Hotels, restaurants and bars are a bit overpriced."*



# Least Appealing Aspects of Vanuatu

*"There were not many vegetarian options for food (we gathered that this was mainly due to cultural differences)."*

*"The food! We want to eat fresh local island food, not 1980's style Western stodge. Meals were too large and they lose money because they could serve less for the same amount."*



# Suggestions for Improvement

Comparison	Nov 2014- Jan 2015	May-Jul 2015	Aug-Nov 2015	Annual
Public services and infrastructure	32%	30%	23%	26%
Entertainment, activities, transport	9%	9%	15%	13%
Flights	5%	6%	15%	11%
Food quality and price	9%	9%	12%	11%
Charges, entrance fee, value for money	16%	9%	8%	9%
Environment	7%	9%	9%	9%
Local people, standards of service	11%	8%	6%	8%
Stayed longer and see more	8%	9%	7%	7%
Accommodation	6%	5%	6%	6%
Weather	2%	7%	3%	4%
Shopping experience	5%	3%	3%	3%
Cyclone Pam	n/a	3%	2%	2%
Safety	1%	1%	1%	1%

# Return and Potential Visits to Outer Islands



**81%** would return to the Vanuatu

**85%** would like to include an outer island on their next trip



## Key take away points:

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- Tourism is a vital resource for the Vanuatu economy. Each visit contributes more than \$US 1500 (VUV 168,000) to the local economy
- The total direct economic impact of tourism is over \$150m per year (17 bn VUV)
- Visitor expenditure is spread across a number of economic sectors – not just accommodation, tours and restaurants. For example 7% of visitor spend in Vanuatu is on taxis, buses and car hire while a further 3% is spent on handicrafts, souvenirs and artwork.



## Key take away points:

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- Yield per visitor across all visitor markets diminished significantly in the wake of Cyclone Pam.
- The hardest hit market in terms of yield reduction was 'Long Haul' (- 30%), the Pacific market was the least hard hit and has largely rebounded.
- The New Zealand (-19%) and Australian (-13%) yield figures remain considerably lower than the pre-cyclone statistics but there is some evidence of upward momentum.
- Average length of stay has decreased slightly from the pre-cyclone period but appears to be returning to pre-disaster levels

## Key take away points:

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- While friends and family/word of mouth and previous visits are the most important factors in making the decision to travel to Vanuatu the internet is the number one tool used to actually plan the journey.
- The importance of word of mouth and the internet as key influences on decision making and planning highlights the need for the use of focused cost effective online marketing strategy and the careful monitoring of user generated content.
- Australian and New Zealand markets tend to be more influenced in their desire to come to Vanuatu by accessibility and the opportunity to relax. Long haul travellers are more likely to be influenced in their decision to come by cultural and environmental/natural attraction dimensions.

## Key take away points:

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- 15% of visitors spend time in Tanna and/or Efate with Ambrym and Malekula being the next most visited (approximately 2%)
- With the exception of Tanna, visitors to outer islands have a higher household income and greater economic impact per visit than those tourists who only go to Efate
- Long haul travellers are more likely to visit outer islands than their shorter haul counterparts
- Of the 81% of visitors who say they will return to Vanuatu approximately 85% say they would like to visit an outer island when they do.

# Key take away points:

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- A key challenge that lies ahead is how to increase visitor spend across all market segments and to identify marketing and product development strategies that can increase overall yield.
- The Australian and New Zealand markets both offer opportunities for enhanced yield generation. In particular there appear to be good opportunities to build the propensity for outer island travel and to develop immersive cultural and natural environmental experiences as well as improving shopping opportunities.
- Long haul markets are relatively high yield, exhibit a greater tendency to visit outer islands and have a longer average length of stay.
- Longer haul visitors also tend to be less satisfied with their experiences than their shorter haul counterparts. There are clearly opportunities to build yield through enhanced delivery of visitor experiences (service, value for money, greater 'sense of place')

## Key take away points:

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- Pacific markets (both New Caledonia and other) are relatively high yield and there are opportunities to grow yield in retail and activities. There is also the potential to build yield from the many business travellers in this market.
- Local people, environment and attractions and activities tend to be the factors listed as most appealing by visitors. The strong showing by culture and local people is particularly noticeable among many longer haul visitors
- Public services/infrastructure, price of goods and services and the quality of the environment/waste management are the factors that are most highly rated as least appealing aspects of visitor experiences

# WHERE TO FROM HERE?

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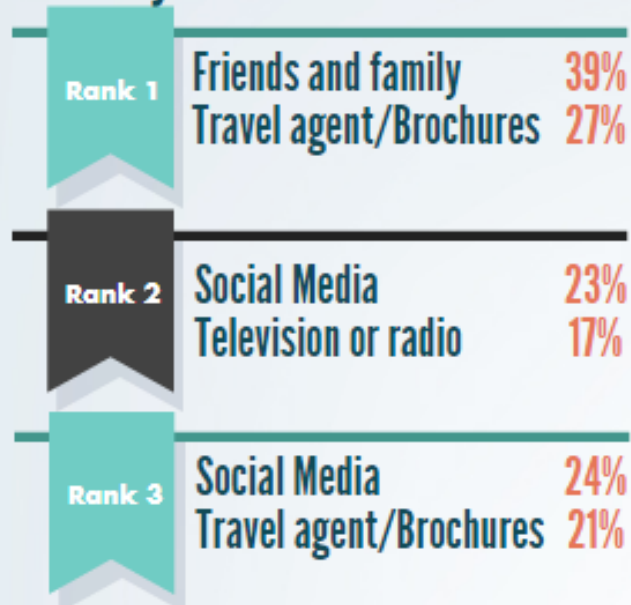
- Another 12 months of data collection and hopefully beyond (cost effective barometer rather than one off surveys)
- Some additions to the survey questions possible
- Capacity building and training
- Perhaps some thought can be given to an ongoing business survey/barometer to begin to ascertain tourist spend linkages/leakages
- Further data mining

# Expenditure while in Vanuatu — country of origin

Expenditure Items	New Caledonia n=225	Other Pacific countries n=257
Domestic travel within Vanuatu (air travel, ferry)	22	9
Food and beverage (restaurant, café)	21	25
Accommodation	16	43
Entertainment activities/casinos	8	4
Taxis/bus/car hire	7	10
Handicraft, souvenirs, artwork	6	7
Tours/tour operator services	6	2
Supermarket/general store items	5	10
Duty free shop (alcohol, tobacco, cosmetics)	4	5
Purchases of clothing (incl. T shirt)	4	5
Local food from the market	2	3
Services (e.g. massage, hairdressing, spa)	2	1
Internet and telecommunication	1	4
Purchases of watches & jewellery	0	1
Total spend (US\$)	\$103	\$129

# CHINA MARKET: Information Sources, Decision-Making

## How did you find out about Vanuatu?



## Influential Decision Making Factors



Nature Attractions/Volcano/Eco-tourism/Photography 4.1 out of 5



Quiet and Relaxing Atmosphere 4.0 out of 5



Beaches and Swimming 3.3 out of 5

Culture and History 3.2 out of 5

## Information Source used for Planning



Vanuatu tourism website 59%



General websites 56%

Travel agents/brochures 54%

Friends and relatives 51%

## Purchasing Behavior

55% Travel arrangements were made by others

28% I made my own travel arrangement

14% I purchased a pre-paid travel package through a travel agent





Thank you!

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