

VANUATU

INTERNATIONAL VISITOR SURVEY

New Caledonia Visitors Insights

2015-2020



Background

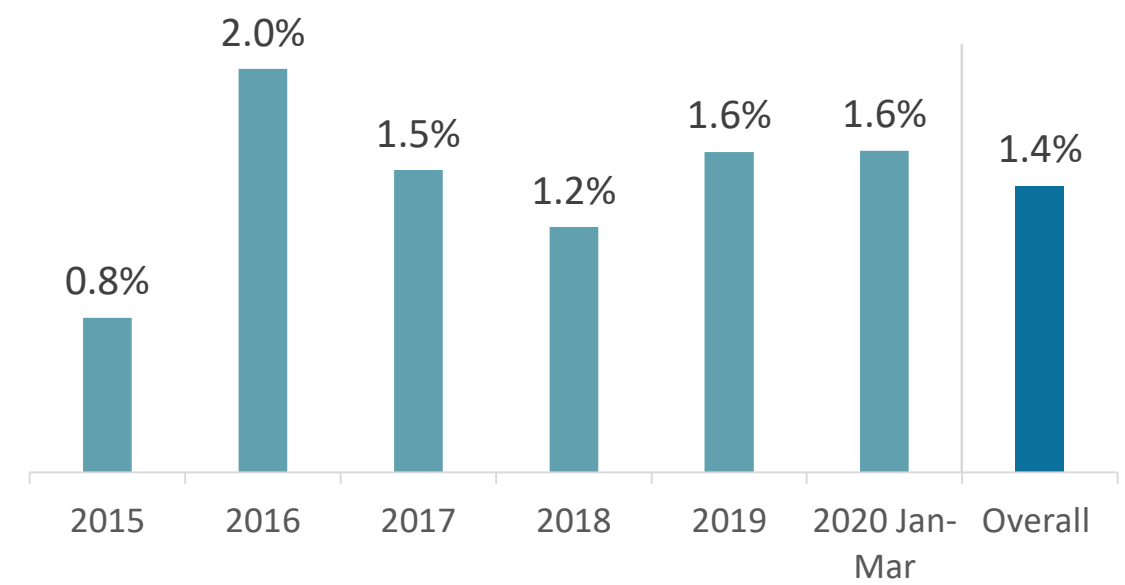
- The 2015-2020 International Visitor Survey dataset is analysed to help us understand the profile of New Caledonia visitors (NC) to Vanuatu over this time period.
- Nearly all reporting covers the 2015-2020 period. Any slides, themes or nodes that represent a shorter period are indicated as *2015-2017 or **2018-2020. These usually reflect changes or additions to certain questions.
- NB The 2020 period only includes the first three months of the year. The 2015 period includes a close down period of approximately 4 months due to Cyclone Pam.
- All reports from the IVS are available at:

<https://www.nztri.org.nz/6289433-ptdi-vanuatu>

The number of NC visitors to Vanuatu surveyed by the IVS typically ranges from 190-240 visitors. Lower numbers in 2015 and 2020 reflect Cyclone Pam and COVID-19 respectively.

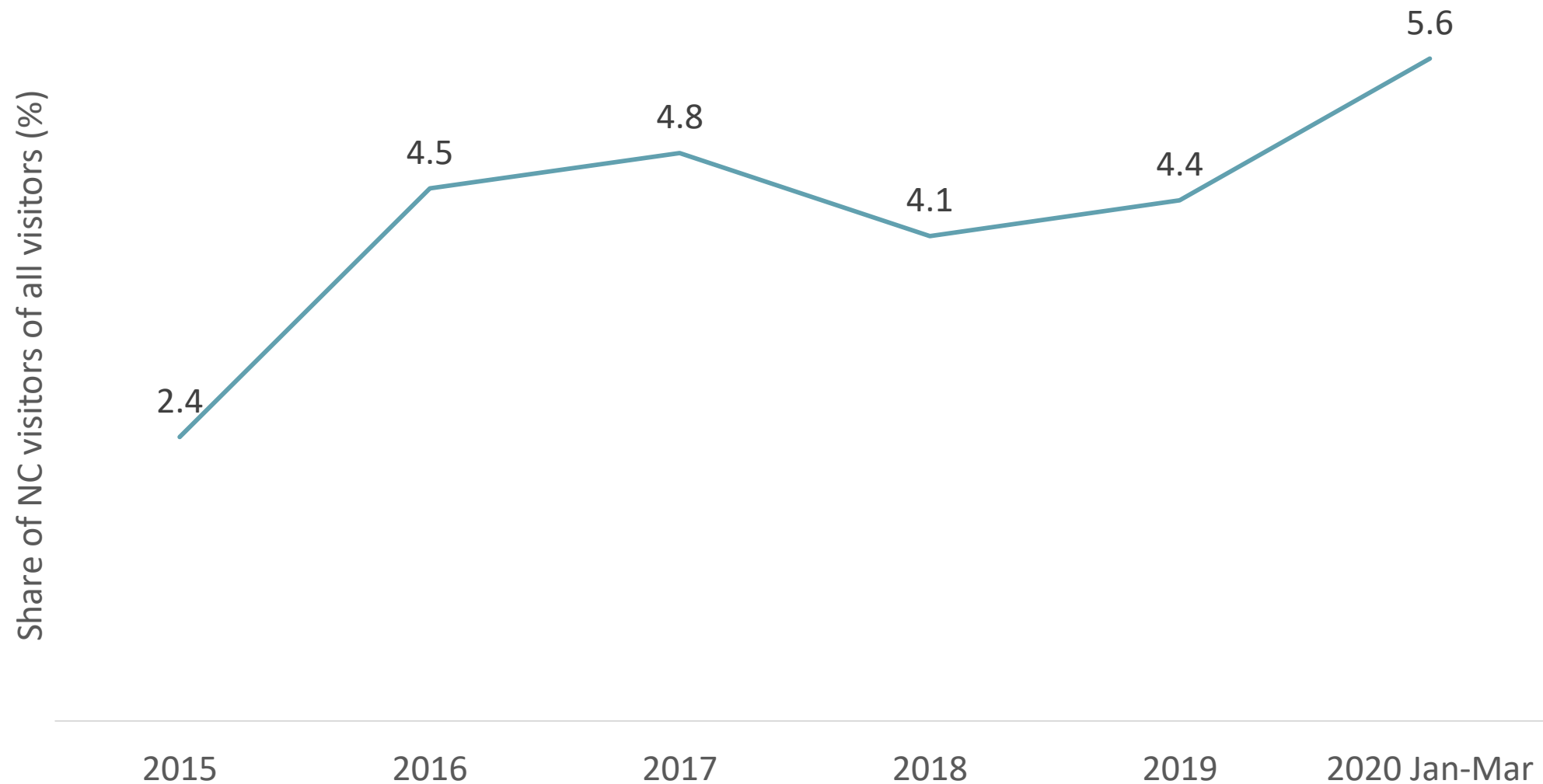


The percentage of NC IVS respondents relative to NC actual arrivals to Vanuatu by year



	<u>NC</u> <u>ACTUAL ARRIVAL</u>	<u>NC IVS</u> <u>RESPONDENTS</u>	<u>%</u>
2015 Annual	10567	82	0.8%
2016 Annual	9681	196	2.0%
2017 Annual	15826	240	1.5%
2018 Annual	15105	186	1.2%
2019 Annual	14738	237	1.6%
2020 Jan-Mar	3778	61	1.6%
Overall	69695	1002	1.4%

The portion of NC visitors within the total IVS sample has remained constant over the 2016-19 period. (NB 2015 French language survey began mid-way through 2015; 2020 period covers Jan-March only)



Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

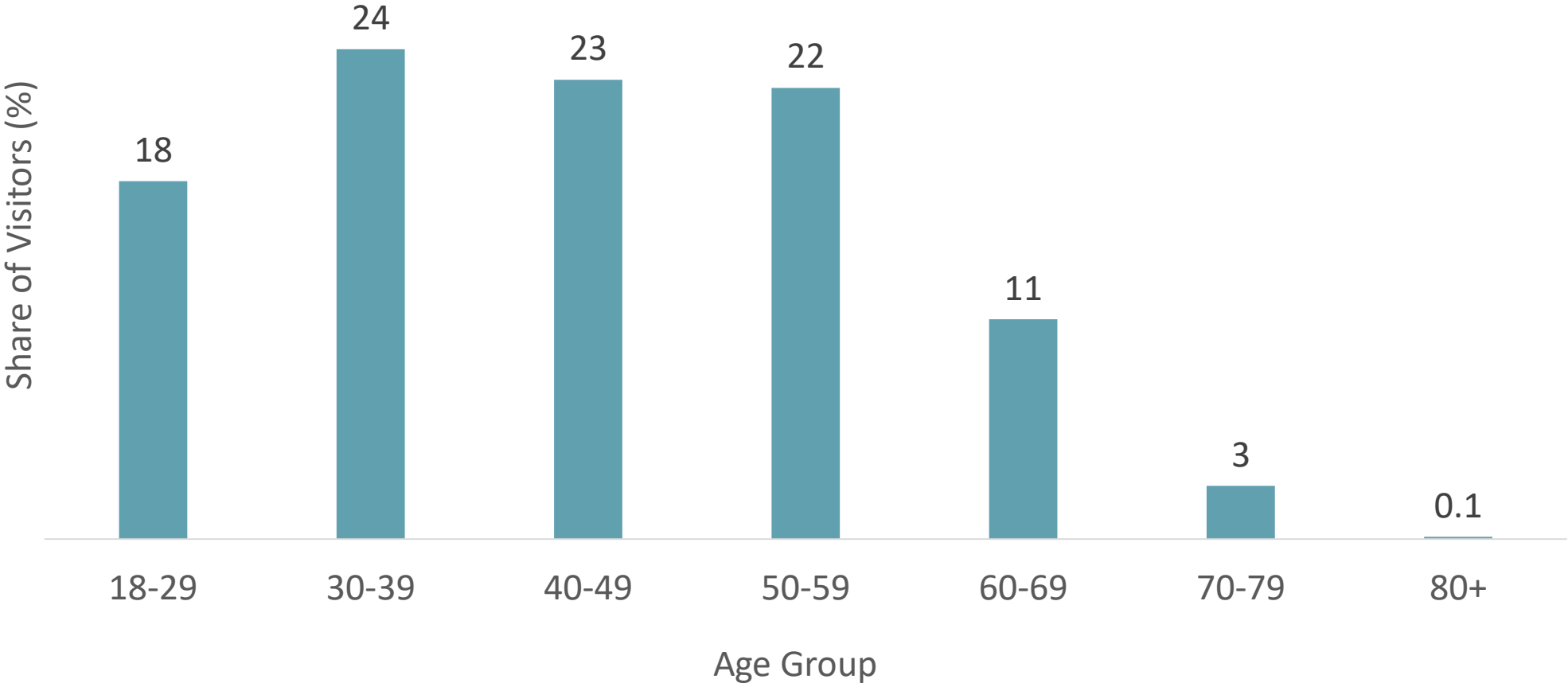


Visitor Spending
and Impact

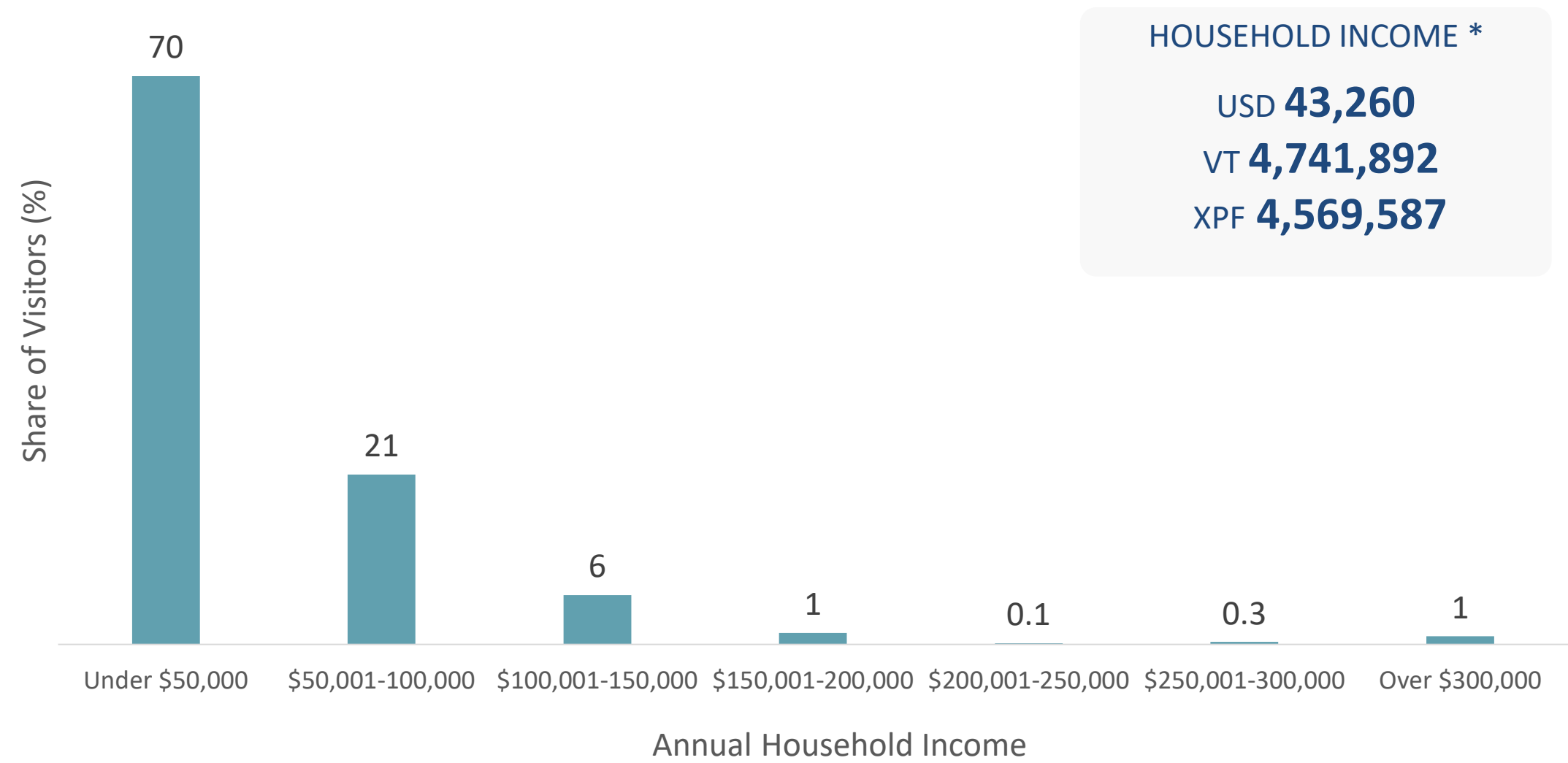


Visitor
Satisfaction

Over two thirds of NC visitors are in the 30-59 age bracket.



Over two thirds (70%) of NC visitors have an average household income under 50,000 USD.



*Note: Percentage figures are rounded; *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.*

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

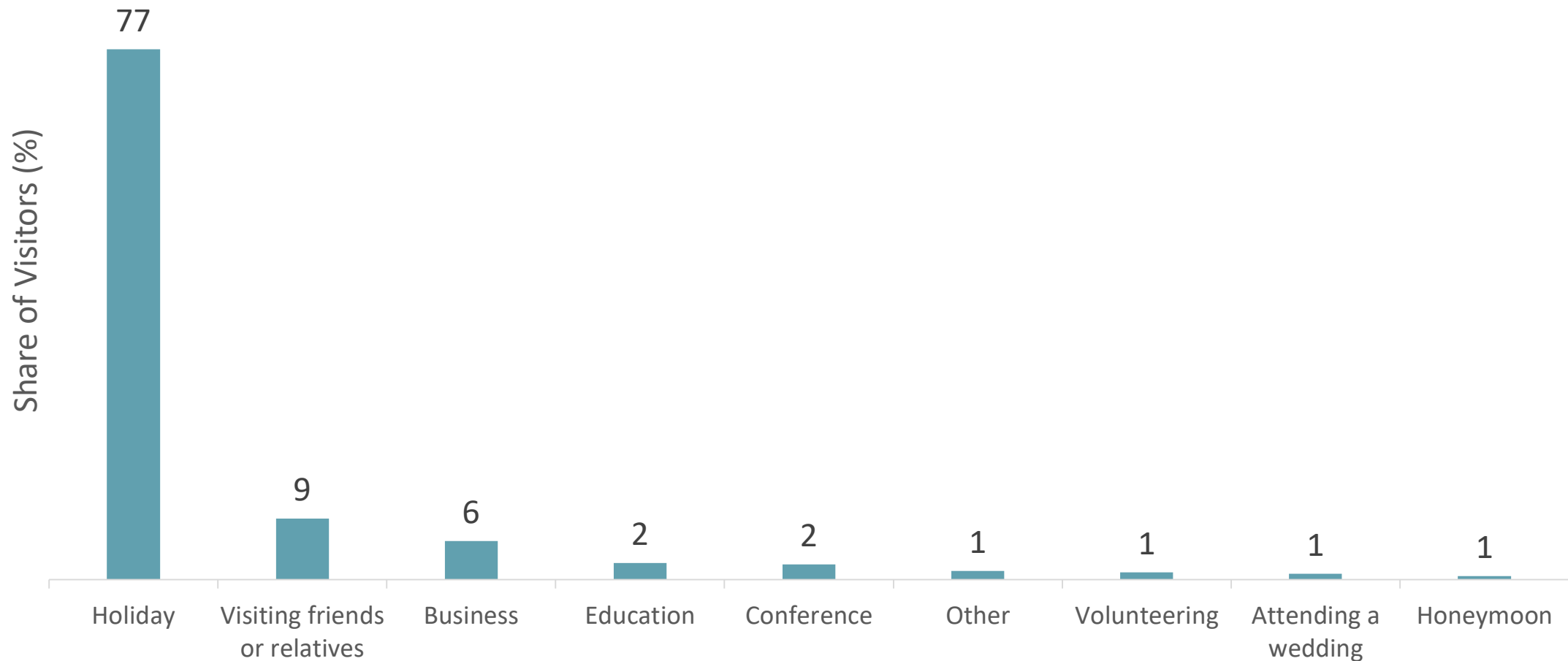


Visitor Spending
and Impact



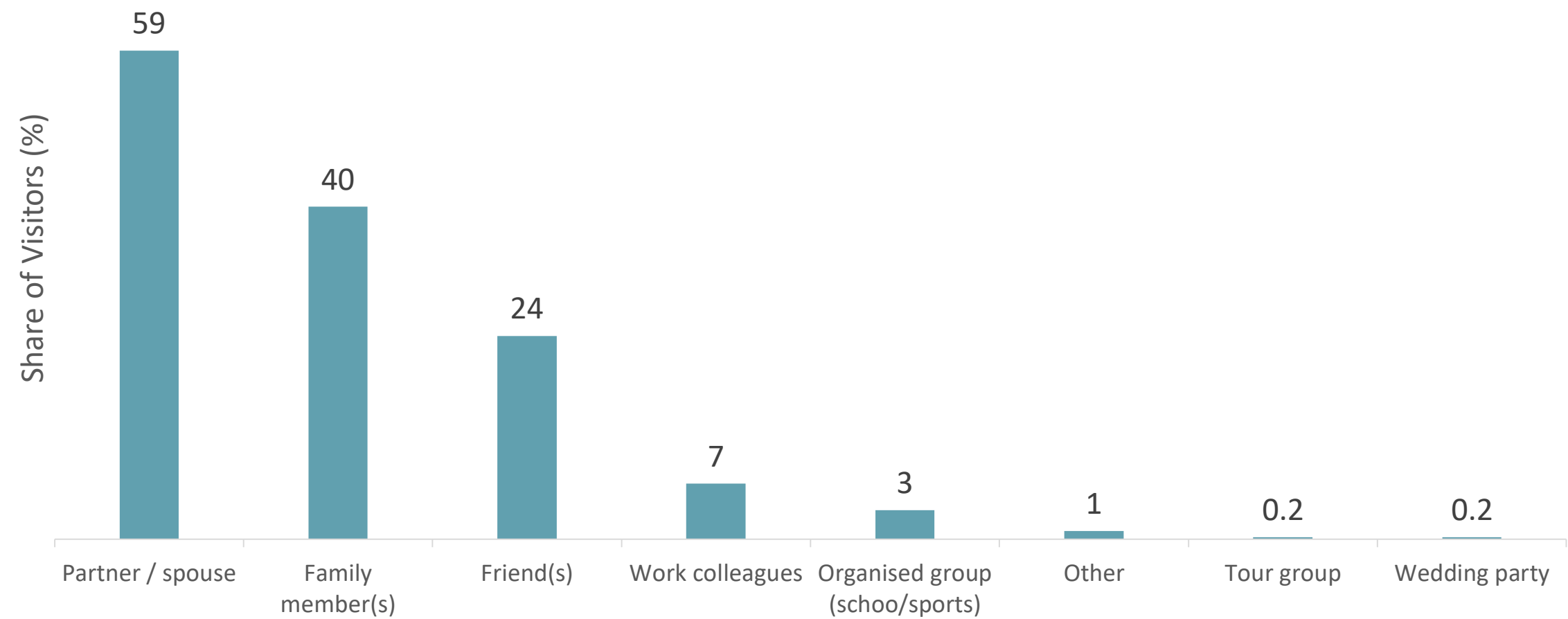
Visitor
Satisfaction

The majority of NC visitors indicate Holiday as their main purpose of visit, followed by visiting friends and relatives (VFR).



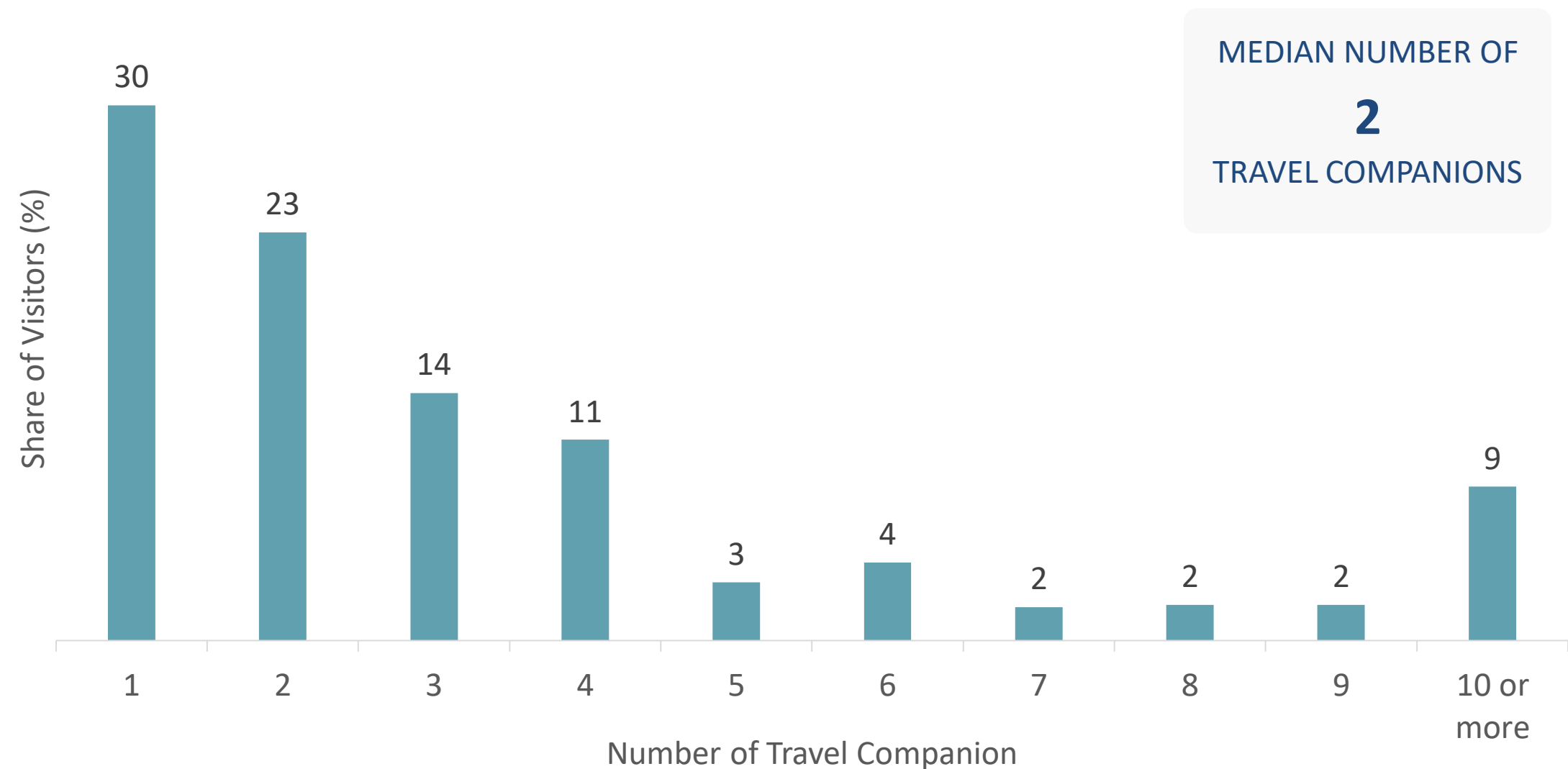
Note: Percentage figures are rounded

NC visitors are most likely to travel with partners and/or with family members.



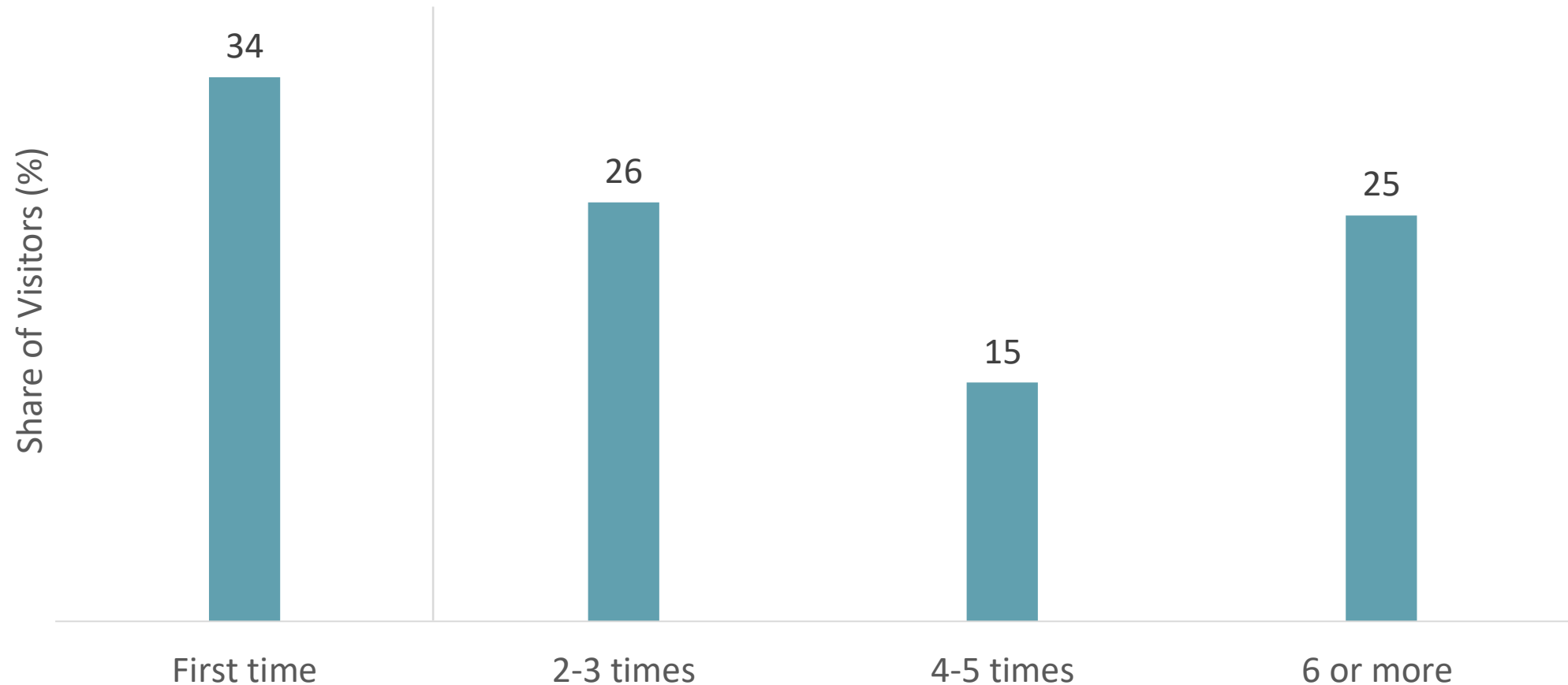
Note: Multiple responses, therefore total does not add up to 100%

Nearly a third (30%) of NC visitors travel as a couple/pair.

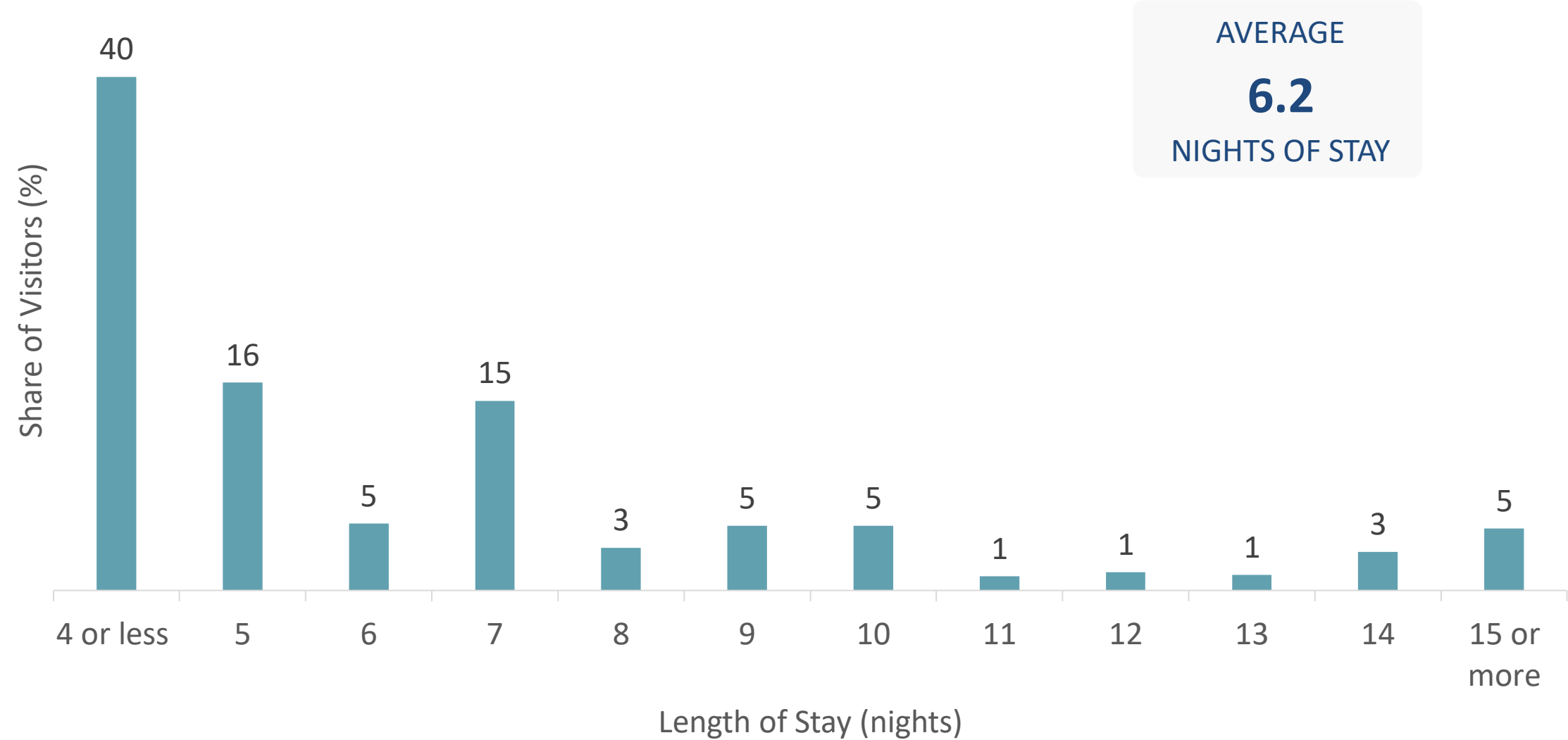


Note: Percentage figures are rounded

Two thirds (66%) of NC visitors are repeat travellers to Vanuatu. A quarter of visitors have visited 6 or more times.

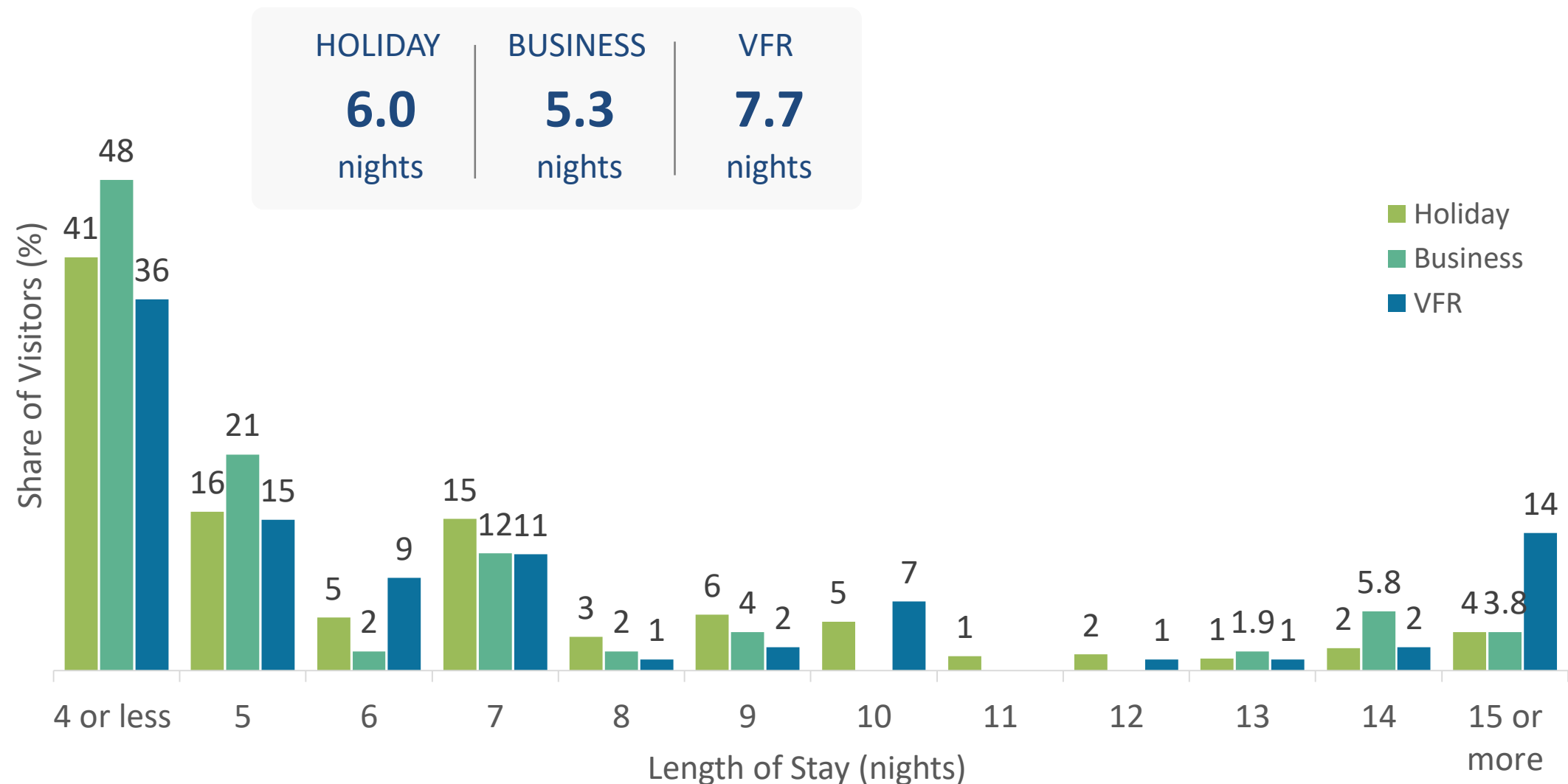


More than half (56%) of NC visitors stayed in Vanuatu less than 5 nights.



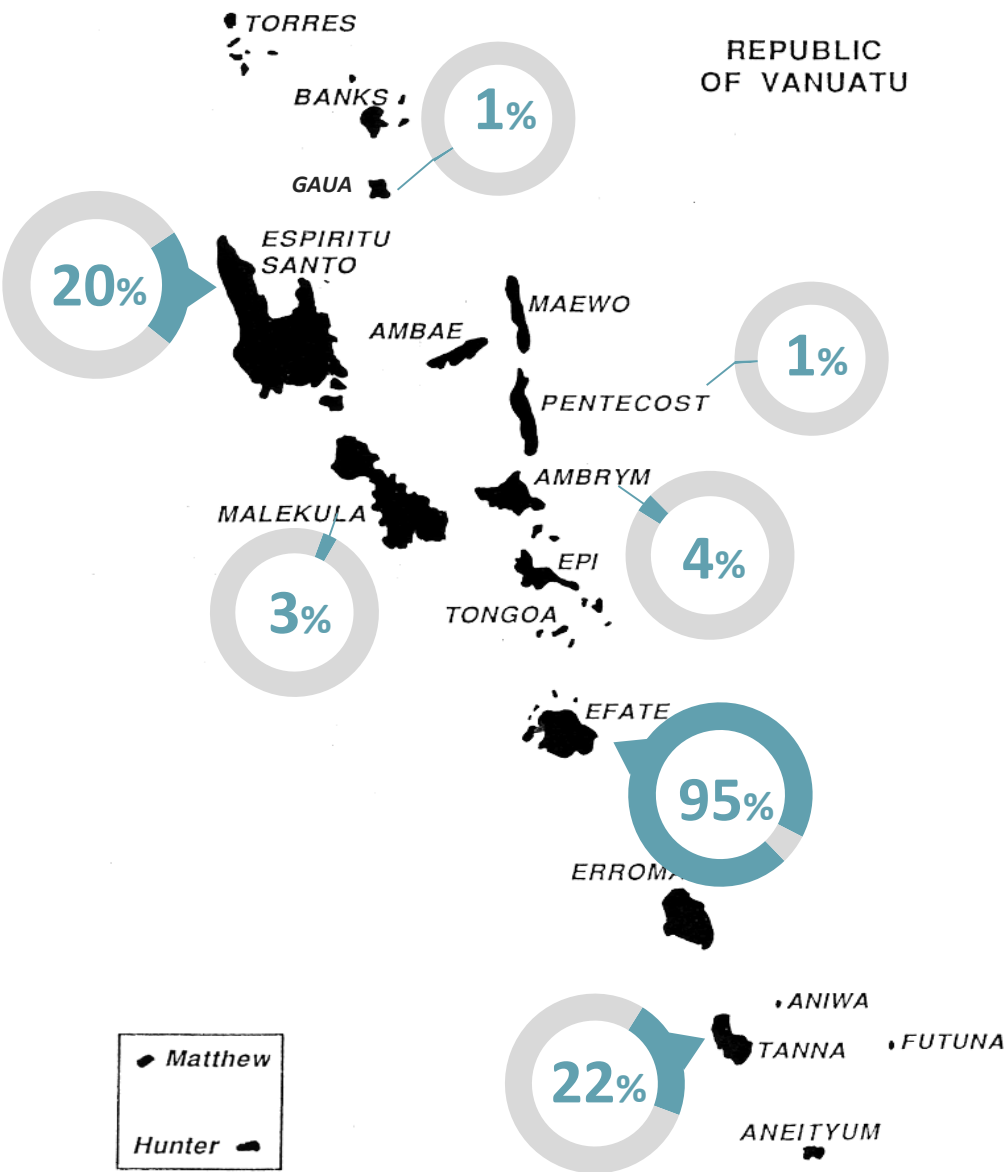
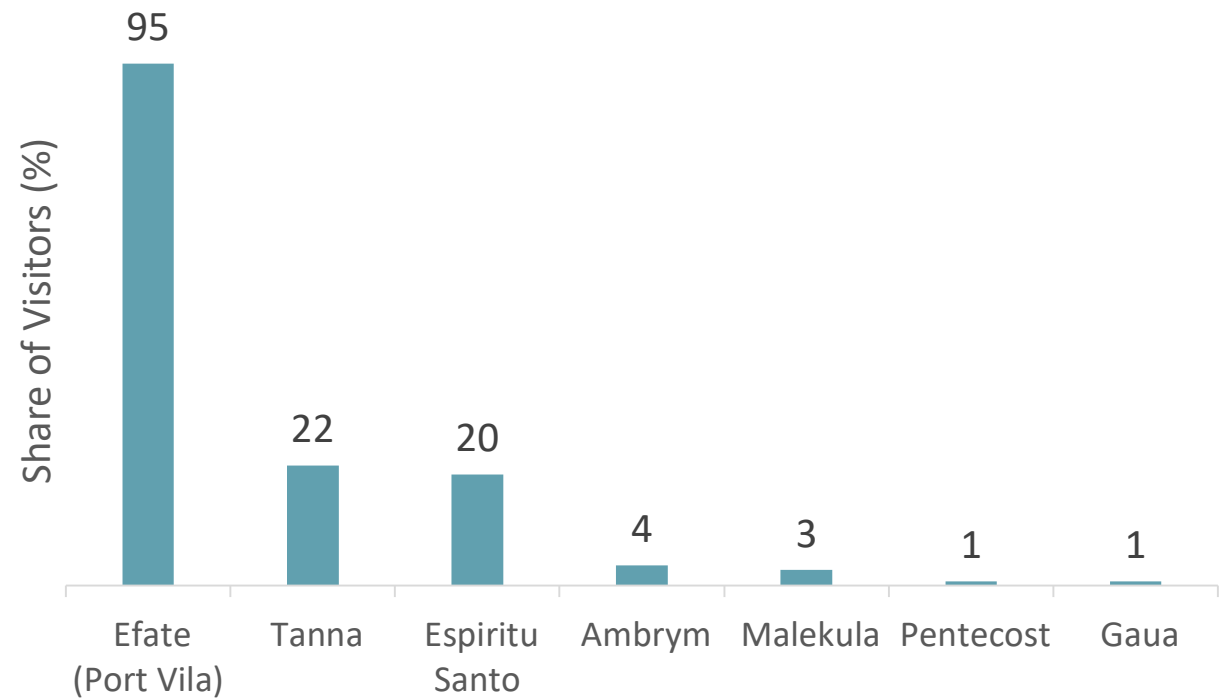
Note: 31 and 31+ days as outliers were removed for length of stay analysis

VFR visitors from NC stayed longer in Vanuatu than Holiday and Business visitors, nearly half of Business travellers stayed fewer than 4 nights.



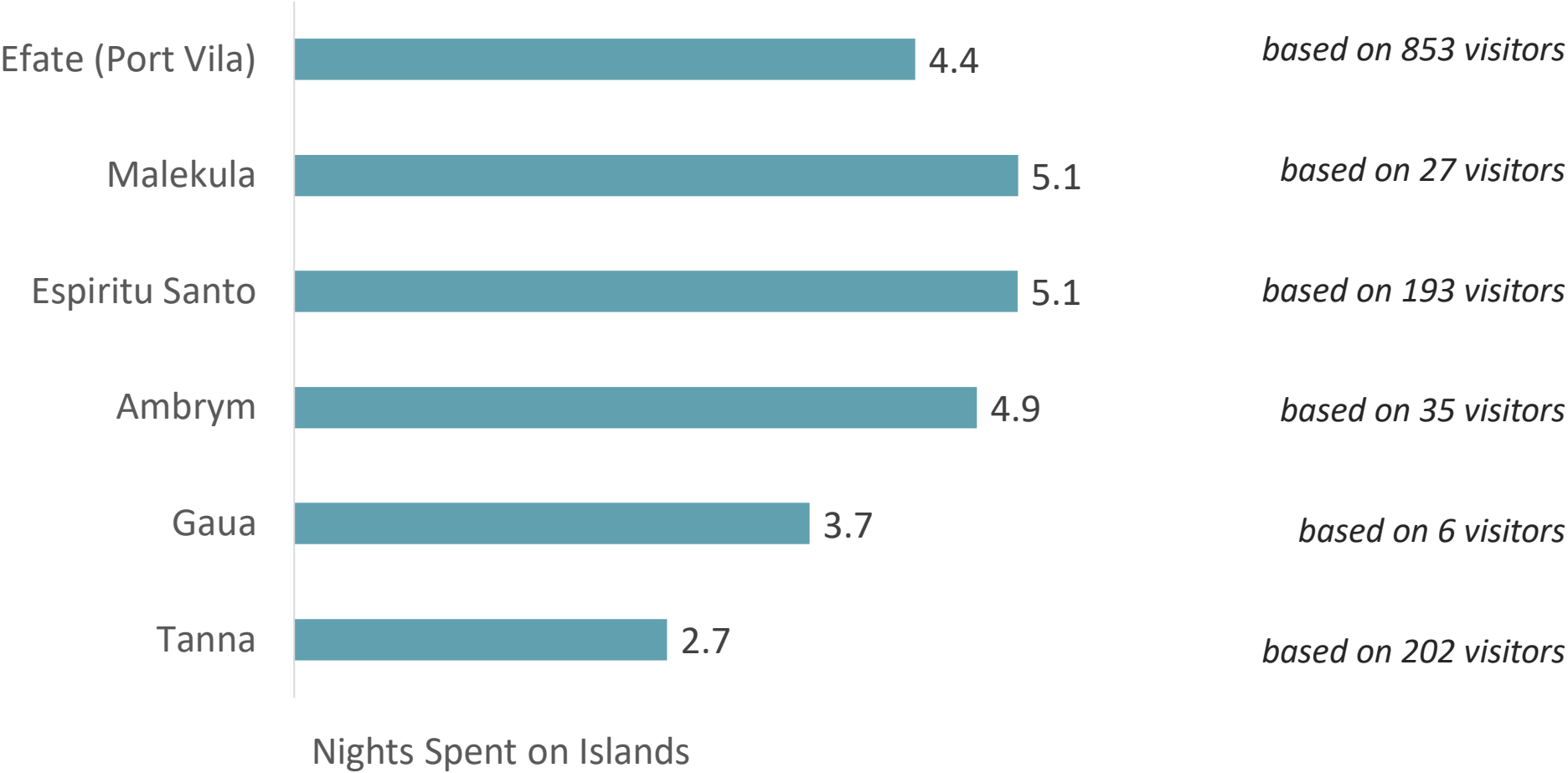
Note: 31 and 31+ days as outliers were removed for length of stay analysis

Beyond Efate NC visitors are most likely to travel to Tanna (22%) and Espiritu Santo (20%)



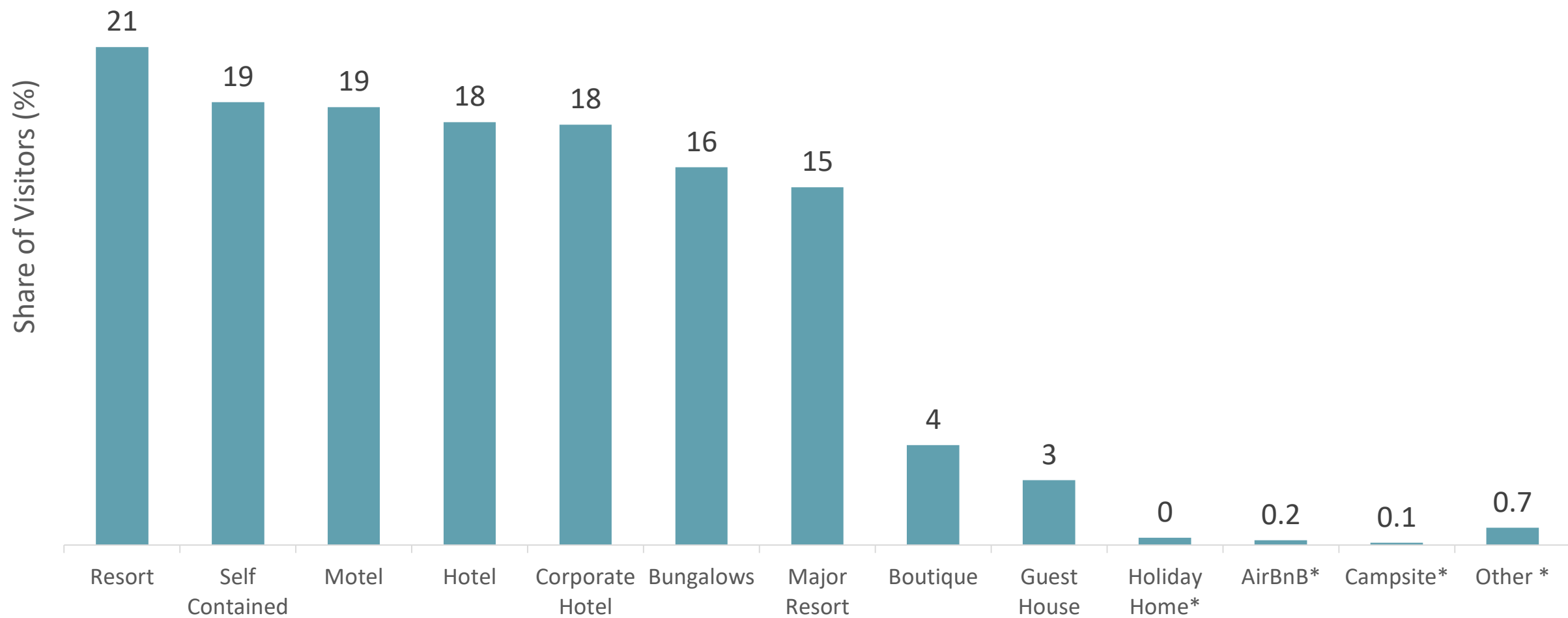
Note: Multiple responses, therefore total does not add up to 100%

Espiritu Santo records a significantly longer length of stay for NC visitors than both Tanna and Efate.



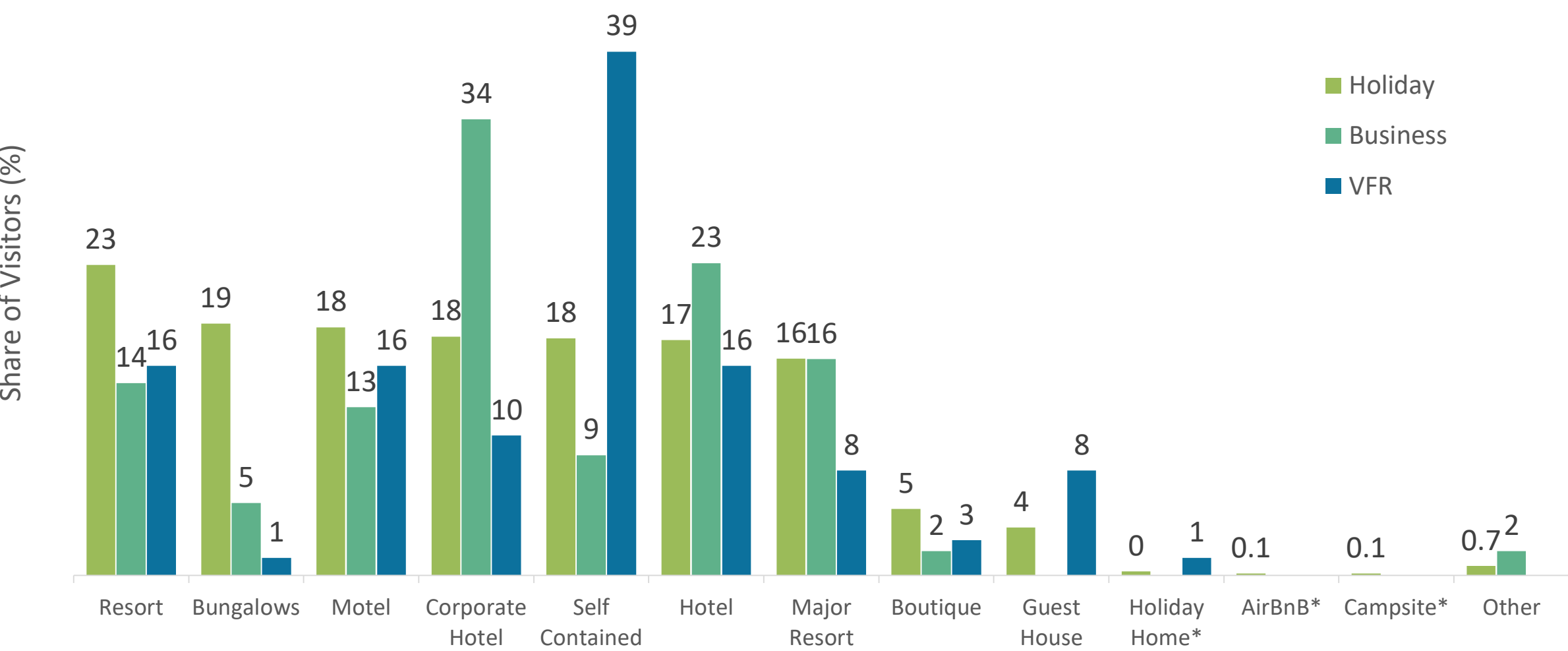
Note: 31 and 31+ days as outliers were removed for length of stay analysis

Resort is the most popular accommodation option among NC visitors to Vanuatu.



*Note: Multiple responses, therefore total does not add up to 100%; * N < 10*

Holiday visitors are more likely to stay in Resorts. Business travellers are more likely to stay in Corporate Hotels, while VFR visitors prefer Self-Contained accommodation.



Note: Multiple responses, therefore total does not add up to 100%; * N < 10

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
and Impact

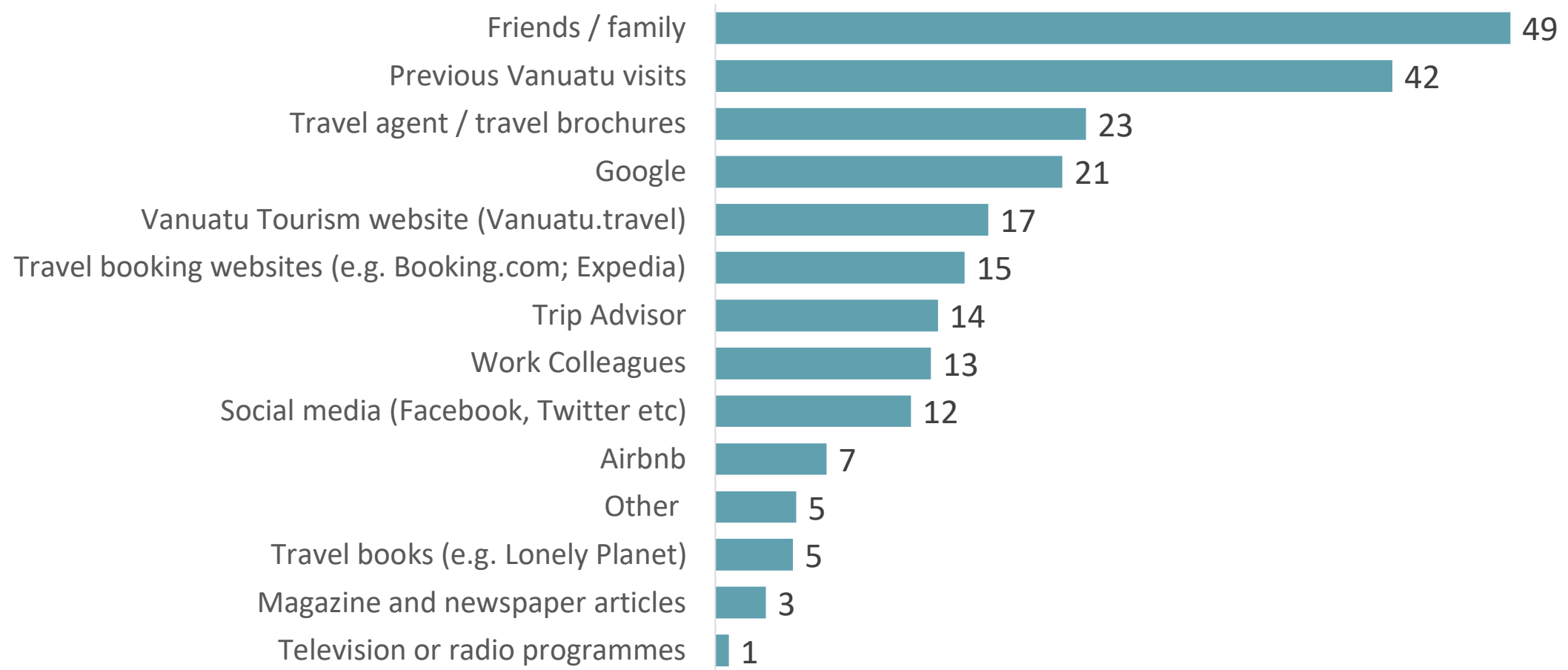


Visitor
Satisfaction

IVS 2018-2020: NC visitors rely heavily on Friends/family and Previous visits. Travel agent/brochures are more likely to be used than online information.

Q

How did you find out about the Vanuatu as a destination?

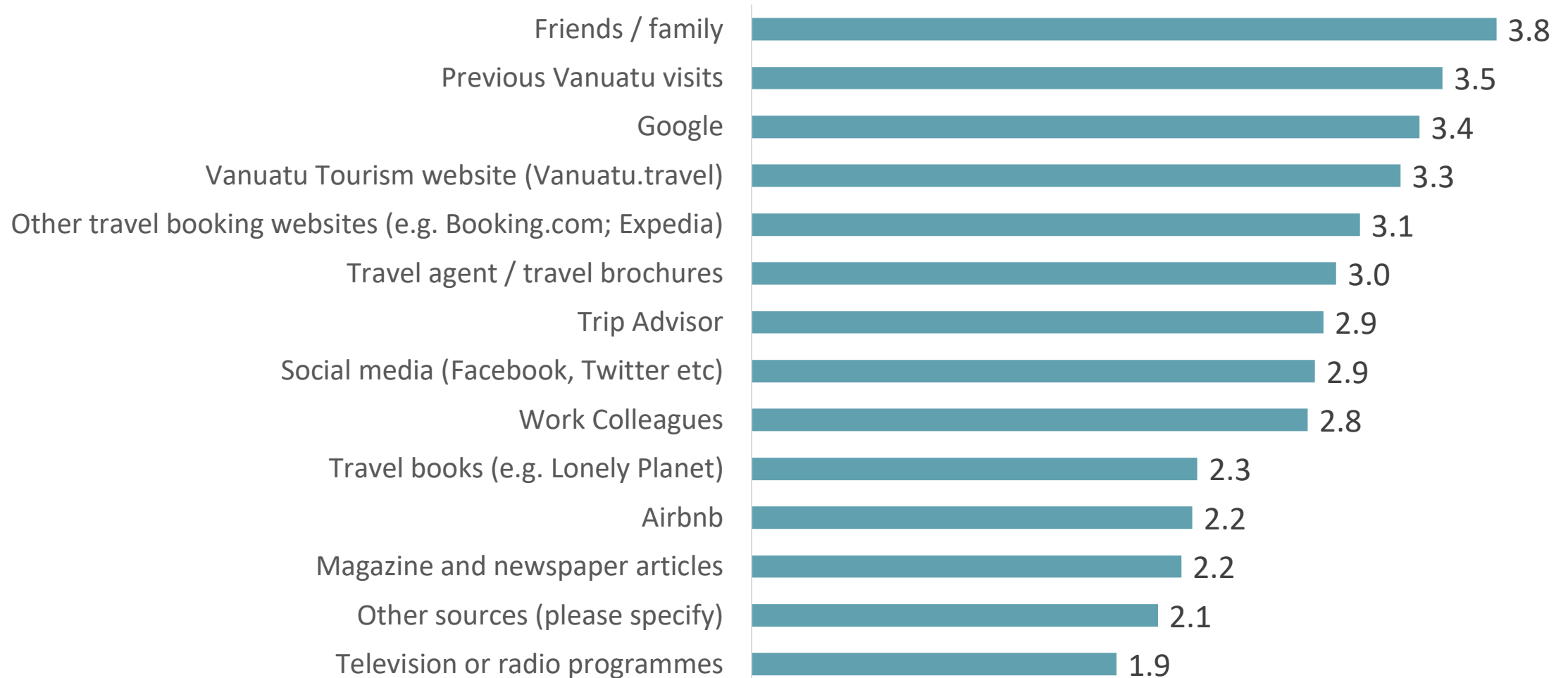


Share of Visitors (%)

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

IVS 2018-2020: Friends/family are the most important information source for planning the visit. Google is the most important online information source.

Q How important were the following information sources during your travel planning?

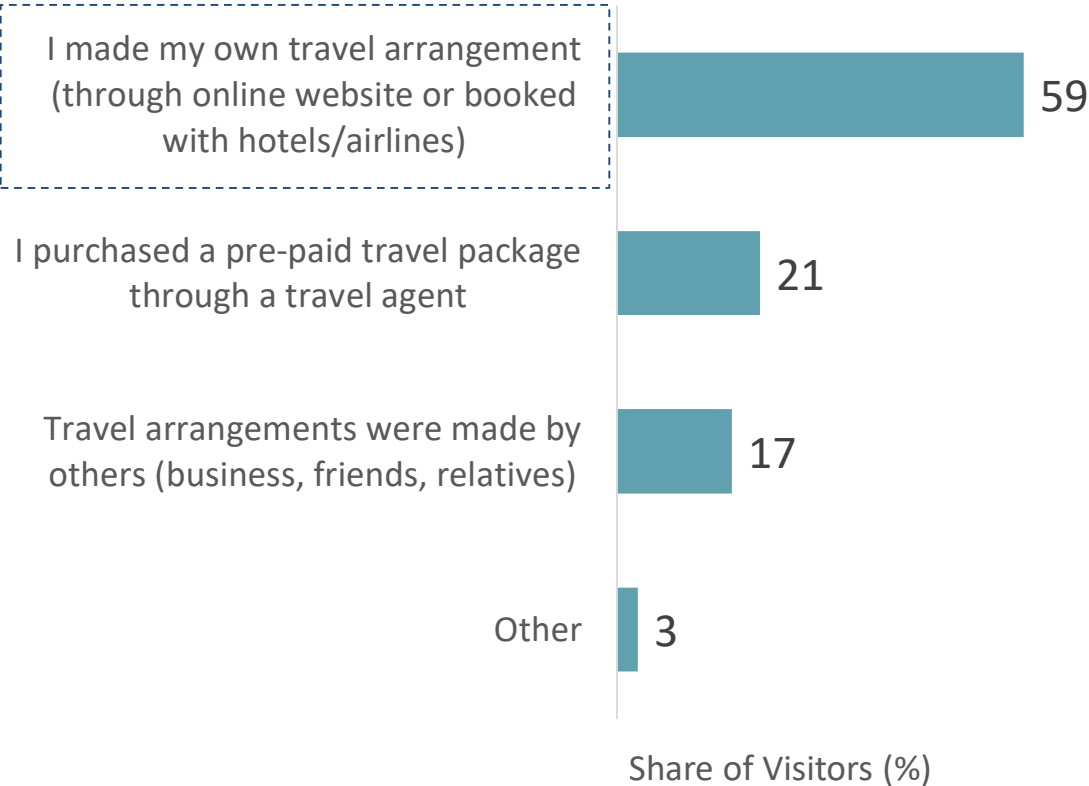


Mean: 1=Not at all important to 5=extremely Important

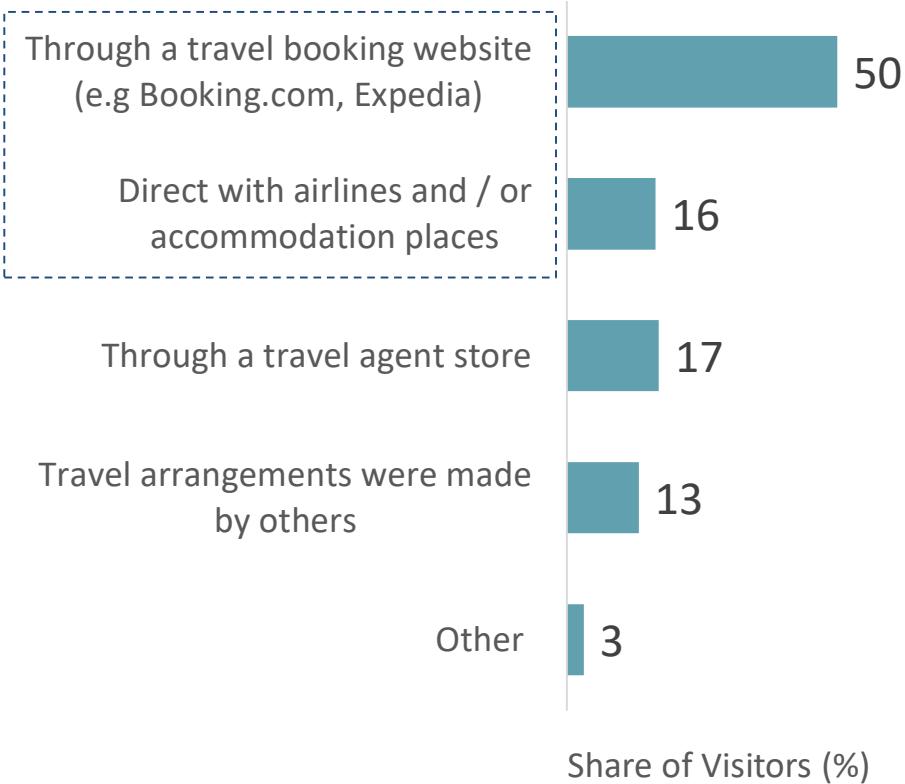
The majority of NC visitors made their own travel arrangements through online websites or direct booking with hotels/airlines.

Q How did you purchase your travel?

IVS 2015-2017

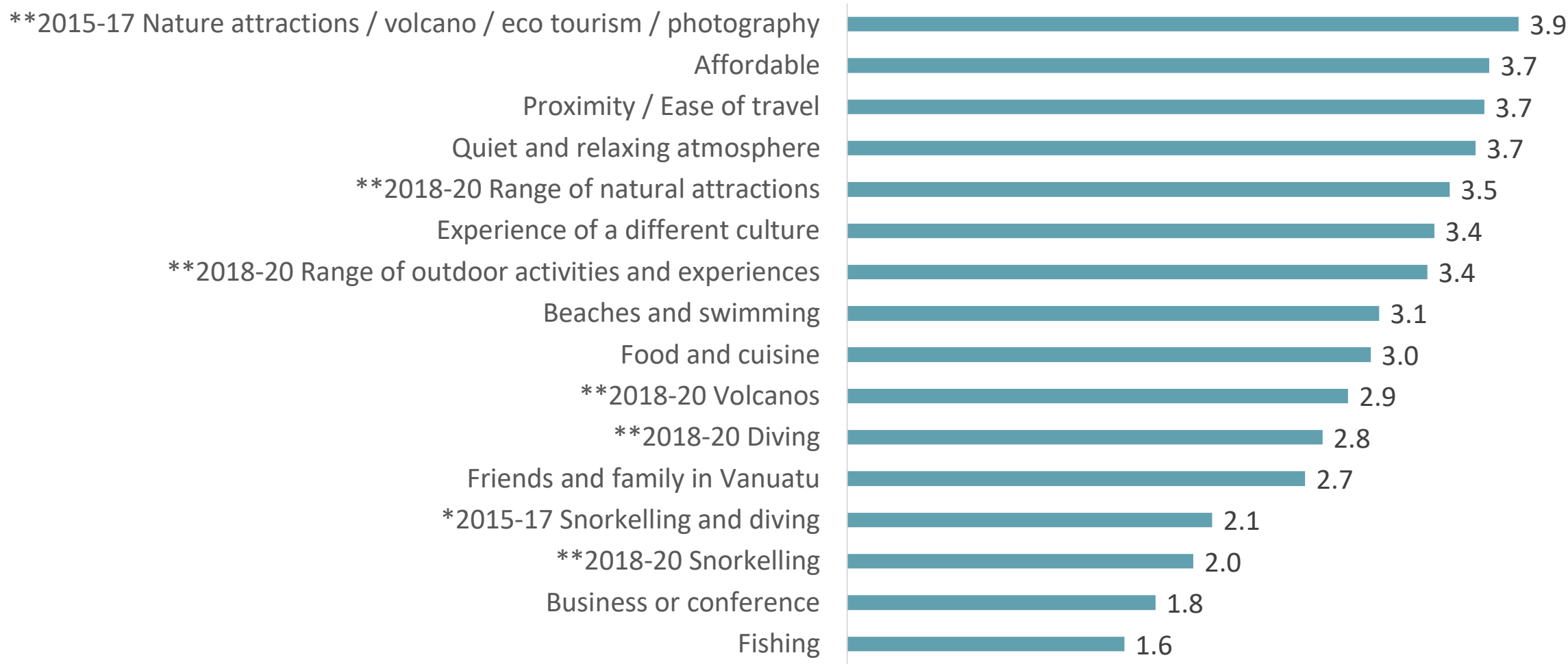


IVS 2018-2020



The affordability and proximity of travel to Vanuatu is the most influential factor for NC visitors from IVS 2015-2020. Natural attractions and a quiet atmosphere also play an important role.

Q How influential were the following factors in your decision to visit Vanuatu?



Mean: 1=No influence to 5=Prime Reason for Visit

Note: * based on IVS 2015-2017; ** based on IVS 2018-2020

Report Structure



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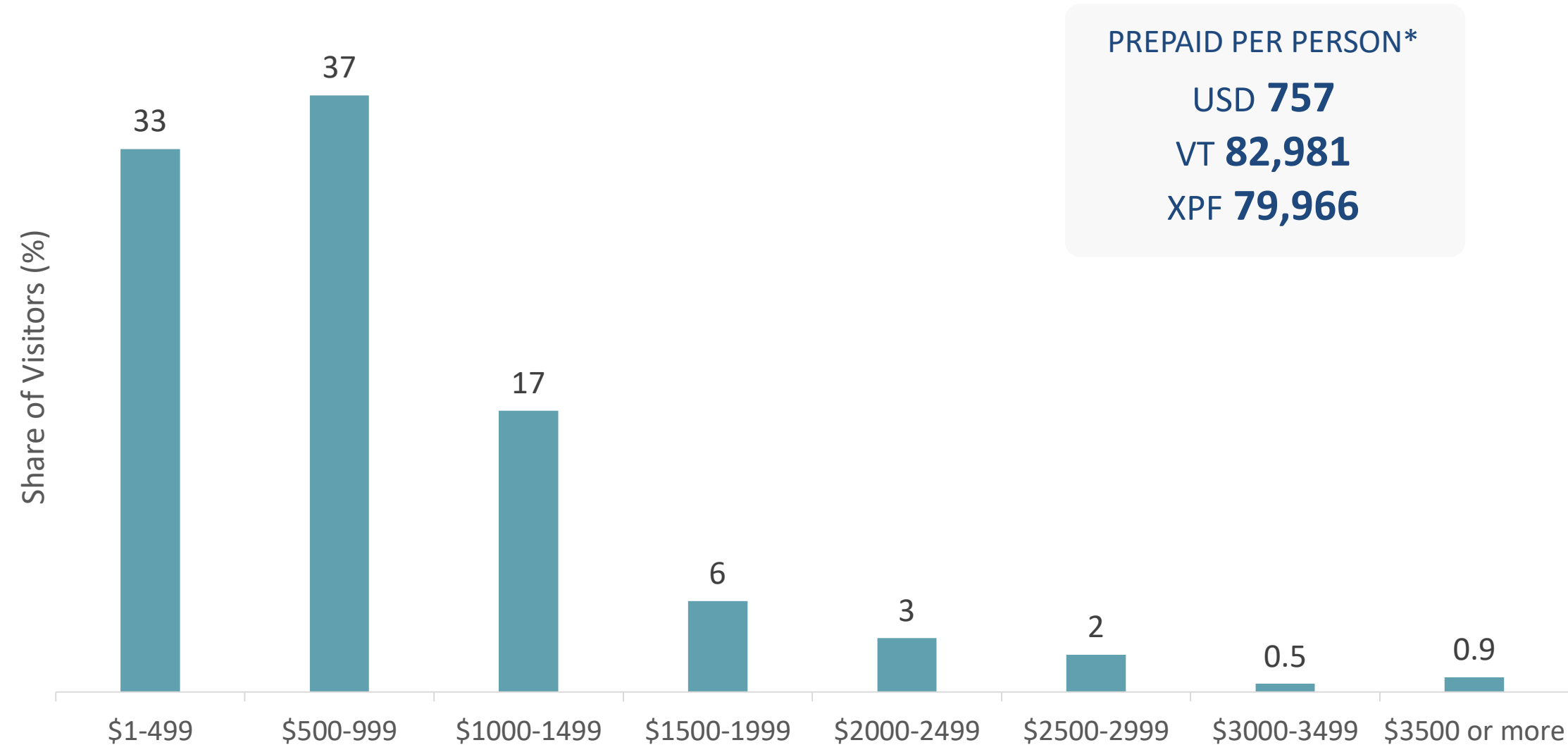


Visitor Spending
and Impact



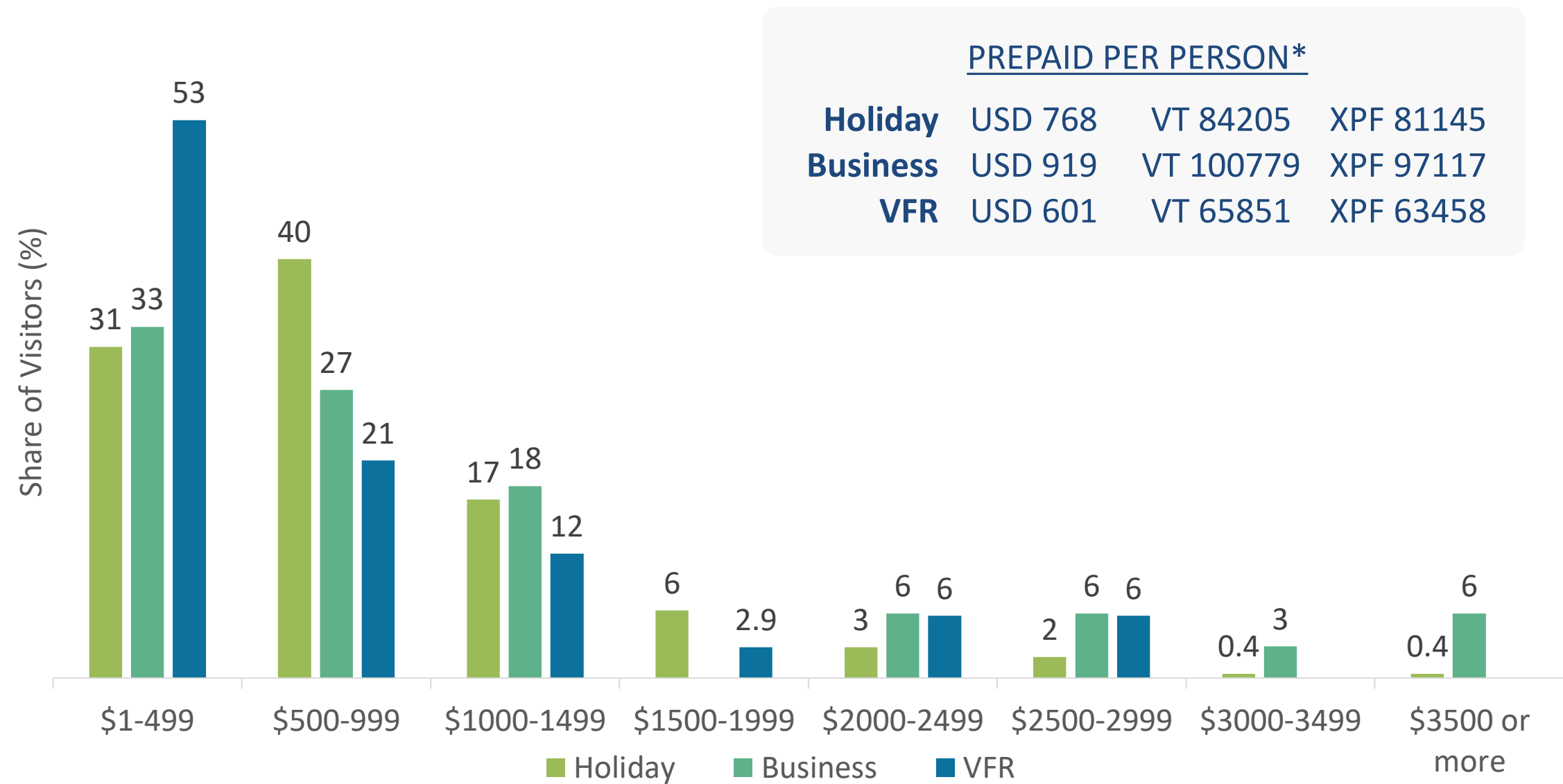
Visitor
Satisfaction

Prepaid expenditure for NC visitors



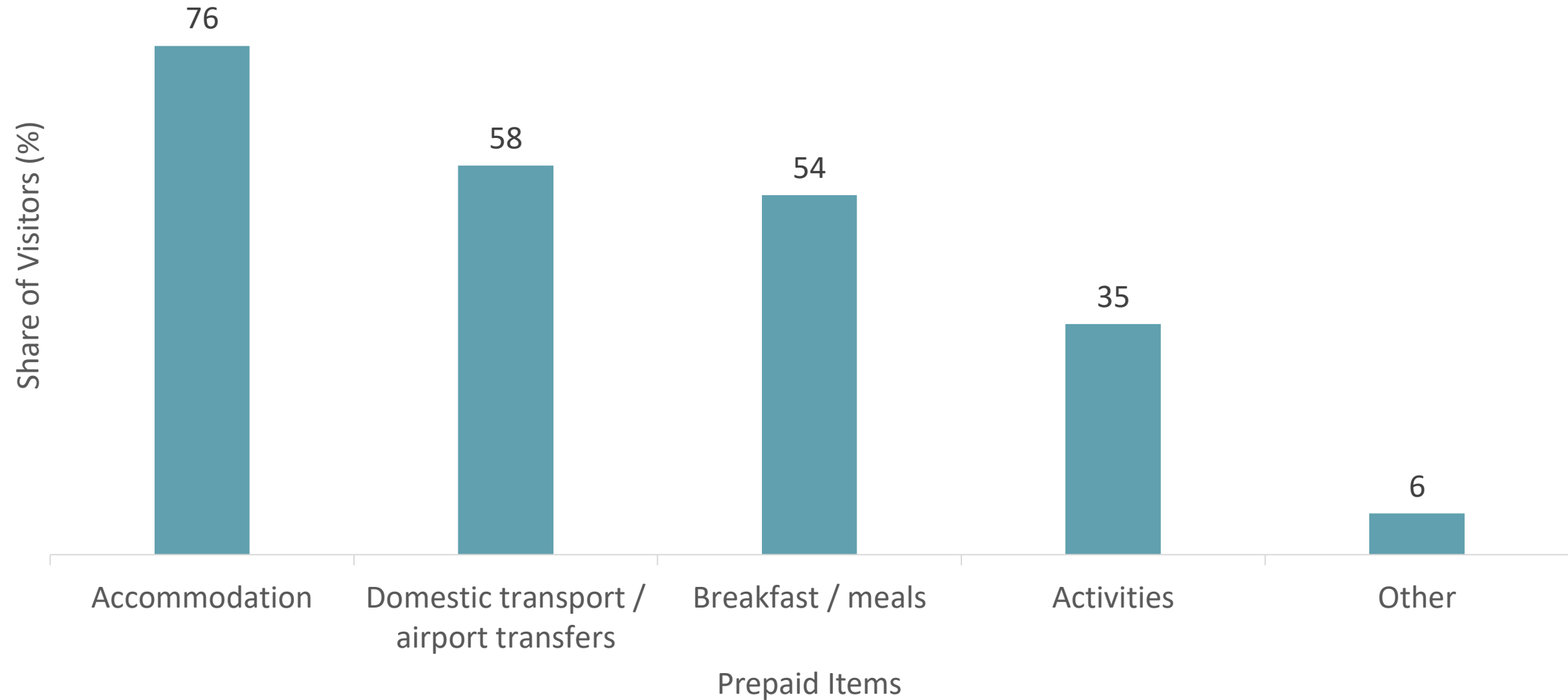
*Note: Percentage figures are rounded; *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.*

Business visitors had the highest prepay expenditure.



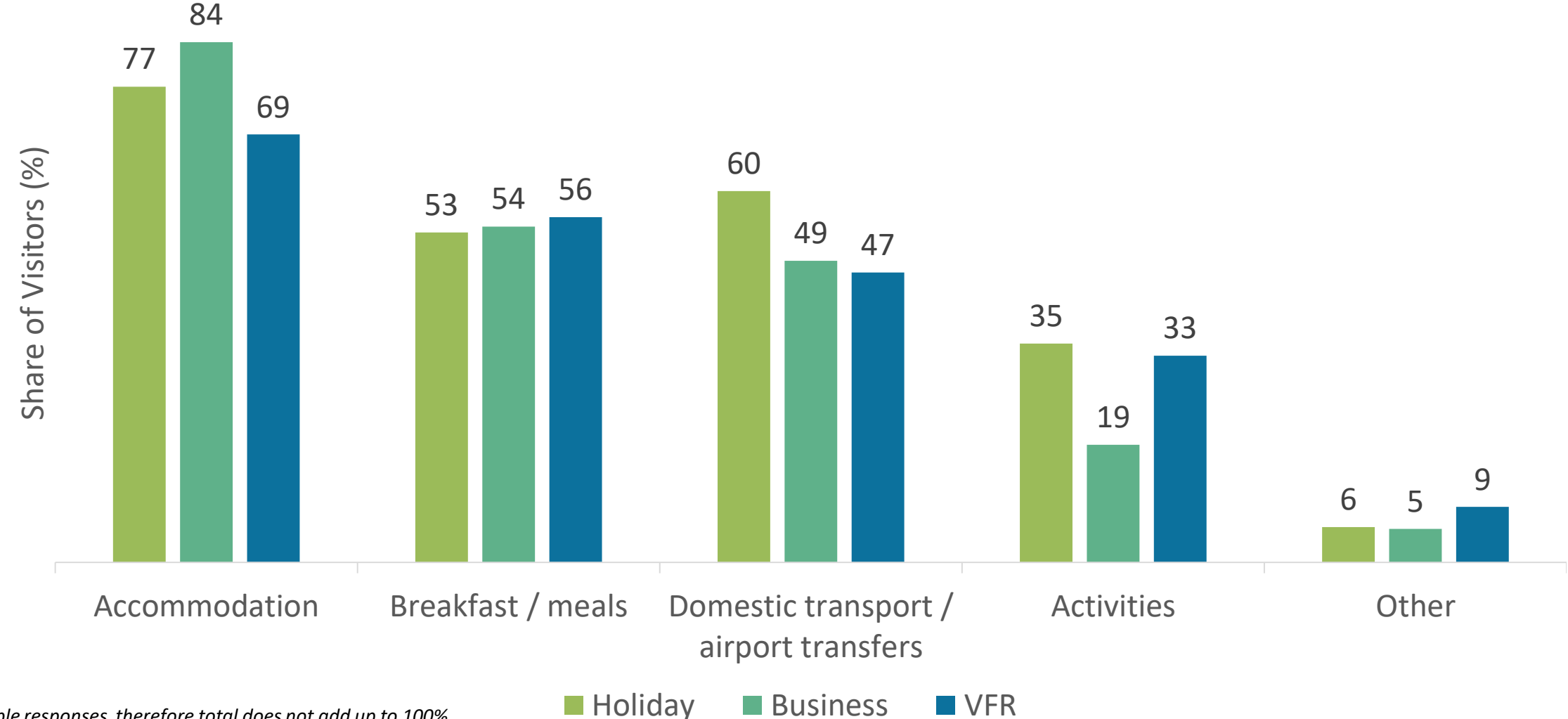
Note: Percentage figures are rounded; *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.

Over three quarters of NC visitors have prepaid for accommodation.



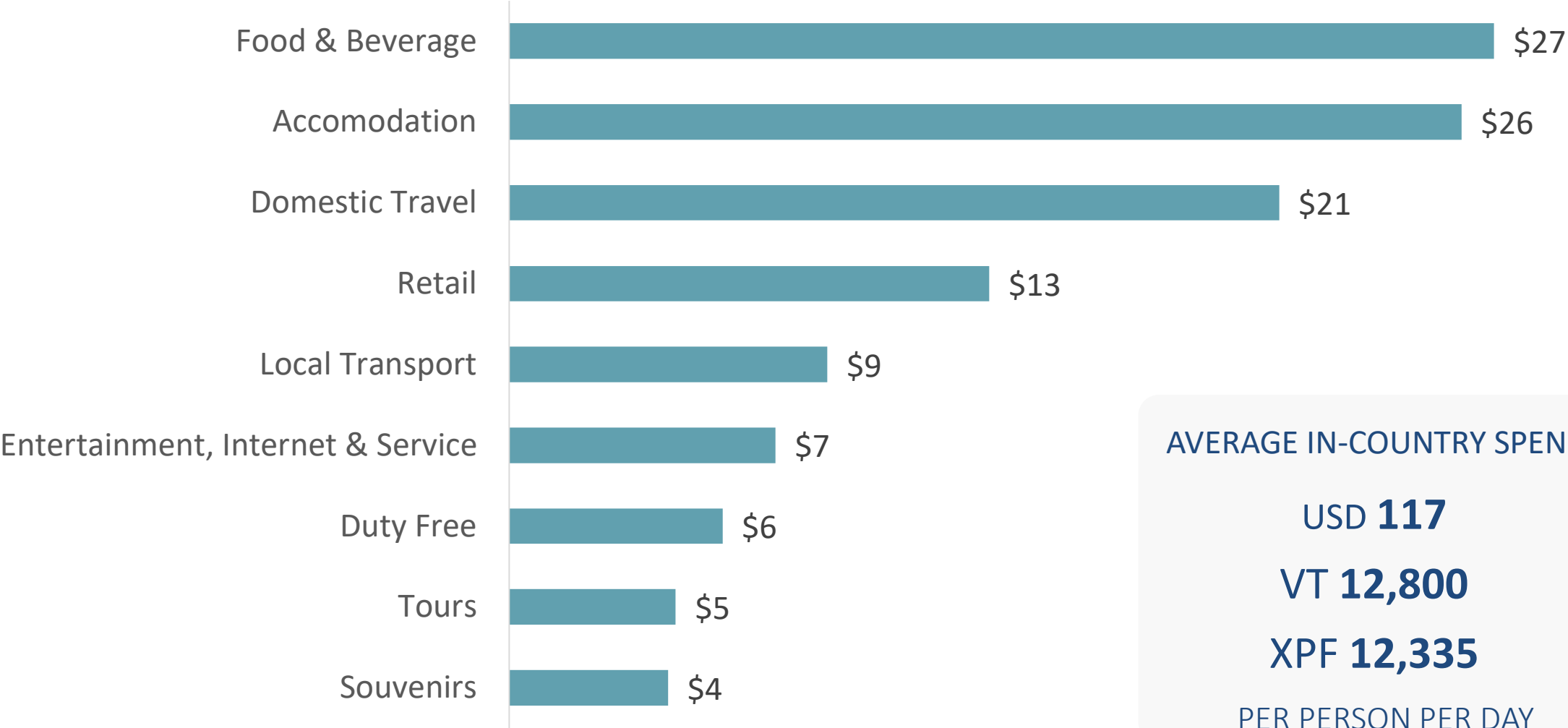
Note: Multiple responses, therefore total does not add up to 100%

Business travellers are likely to pay more on accommodation prior to visit.



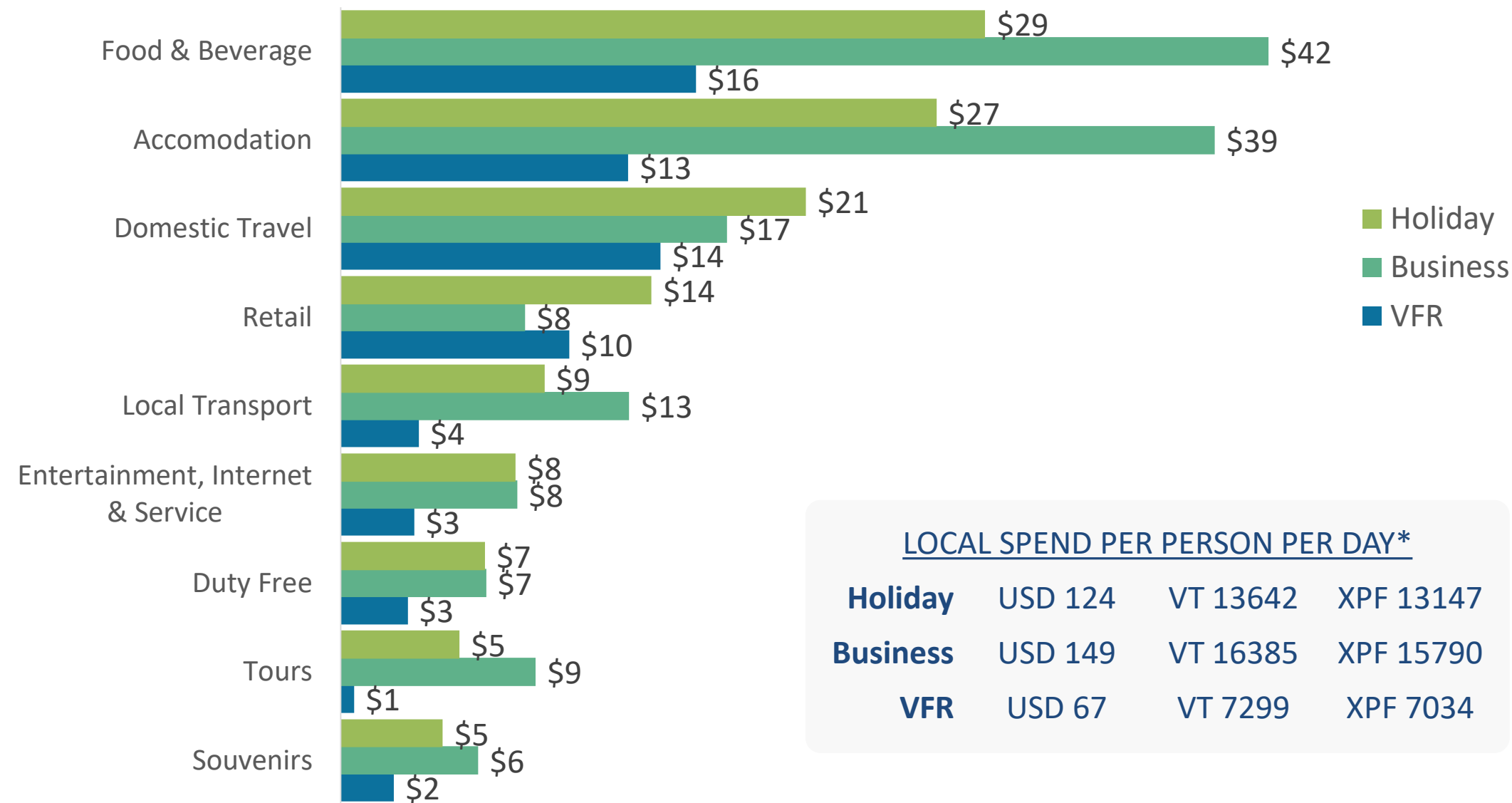
Note: Multiple responses, therefore total does not add up to 100%

In-country spend per person per day averages VT 12,800



*Note: USD in the bar chart; *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.*

Business travellers have the highest in-country spend per person per day



Note: USD in the bar chart; *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.

Economic Impact – Per Person Per Day and per Trip: ALL NC VISITORS



Average Spend Prior to arrival	*USD / VUV / XPF
Per Person Per Trip	\$757 / VT82,981 / F79,966
Flowing into local economy rate – estimated 62.5%	
Per Person Per Trip	\$473 / VT51,863 / F49,979
Per Person per Day	\$76 / VT8,365 / F8061

Average In-country Spend	Length of stay - 6.2 nights
Per Person Per Trip	\$724 / VT79,360/ F74,476
Per Person per Day	\$117 / VT12,800 / F12,335

Total Economic Impact-Per Trip	\$1,197 / VT131,223 / F126,455
Total Economic Impact-Per Day	\$193 / VT21,165 / F20,396

Note: *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.

Economic Impacts: Per Person and Total ALL NC VISITORS

PRE-PAID SPEND FLOWING INTO LOCAL ECONOMY (est. 62.5%) + IN-COUNTRY SPEND = TOTAL ECONOMIC IMPACT			
 PER DAY	US\$ 76 VT 8,365 XPF 8,061	US\$ 117 VT 12,800 XPF 12,335	US\$ 193 VT 21,165 XPF 20,396
 PER TRIP	US\$ 473 VT 51,861 XPF 49,979	US\$ 724 VT 79,360 XPF 76,476	US\$ 1,197 VT 131,223 XPF 126,455

Note: *Average exchange rates for VUV/XPF to USD from 2015-2020 applied.

Economic Impact – Per Person Per Day and per Trip: NC HOLIDAY VISITOR

Average Spend Prior to arrival

*USD / VUV / XPF

Per Person Per Trip

\$768 / VT84,205 / F81,145

Flowing into local economy rate – estimated 62.5%

Per Person Per Trip

\$480 / VT52,628 / F50,716

Per Person per Day

\$80 / VT8,771 / F8,453

Average Local Spend

Length of stay - 6.0 nights

Per Person Per Trip

\$747 / VT 81,854 / F78,879

Per Person per Day

\$124 / VT13,642 / F13,147

Total Economic Impact-Per Trip

\$1,227 / VT134,482 / F129,595

Total Economic Impact-Per Day

\$204 / VT22,413 / F21,600

Economic Impact – Per Person Per Day and per Trip: NC BUSINESS TRAVELLER

Average Spend Prior to arrival

*USD / VUV / XPF

Per Person Per Trip \$919 / VT100,779 / F97,117

Flowing into local economy rate – estimated 62.5%

Per Person Per Trip \$575 / VT62,987 / F60,698

Per Person per Day \$109 / VT11,907 / F11,474

Average In-country Spend

Length of stay – 5.3 nights

Per Person Per Trip \$791 / VT86,678 / F83,529

Per Person per Day \$149 / VT16,385 / F15,790

Total Economic Impact-Per Trip

\$1,365 / VT149,665 / F144,227

Total Economic Impact-Per Day

\$258 / VT28,292 / F27,264

Economic Impact – Per Person Per Day and per Trip: NC VFR VISITOR

Average Spend Prior to arrival

*USD / VUV / XPF

Per Person Per Trip

\$601 / VT65,851 / F63,458

Flowing into local economy rate – estimated 62.5%

Per Person Per Trip

\$375 / VT41,157 / F39,661

Per Person per Day

\$49 / VT5,359 / F5,164

Average In-country Spend

Length of stay - 6.2 nights

Per Person Per Trip

\$511 / VT56,056 / F54,019

Per Person per Day

\$67/ VT7,299/ F7,034



Total Economic Impact-Per Trip

\$886 / VT97,212 / F93,680

Total Economic Impact-Per Day

\$116 / VT12,658 / F12,198

Economic Impacts: Business travellers have the highest spending per trip and per person.

		PRE-PAID SPEND FLOWING TO VANUATU (est. 62.5%) *USD / VUV / XPF	+	IN-COUNTRY SPEND *USD / VUV / XPF	=	TOTAL ECONOMIC IMPACT *USD / VUV / XPF
 PER DAY	Holiday	80 / 8771 / 8453		124 / 13642 / 13147		204 / 22413 / 21600
	Business	109 / 11907 / 11474		149 / 16385 / 15790		258 / 28292 / 27264
	VFR	49 / 5359 / 5164		67 / 7299 / 7034		116 / 12658 / 12198
 PER TRIP	Holiday 6.0 nights	480 / 52628 / 50716		747 / 81854 / 78879		1227 / 134482 / 129595
	Business 5.3 nights	575 / 62987 / 60698		791 / 86678 / 83529		1365 / 149665 / 144227
	VFR 7.7 nights	375 / 41157 / 39661		511 / 56056 / 54019		886 / 97212 / 93680

Note: *Average exchange rates for VUV / XPF to USD from 2015-2020 applied.

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

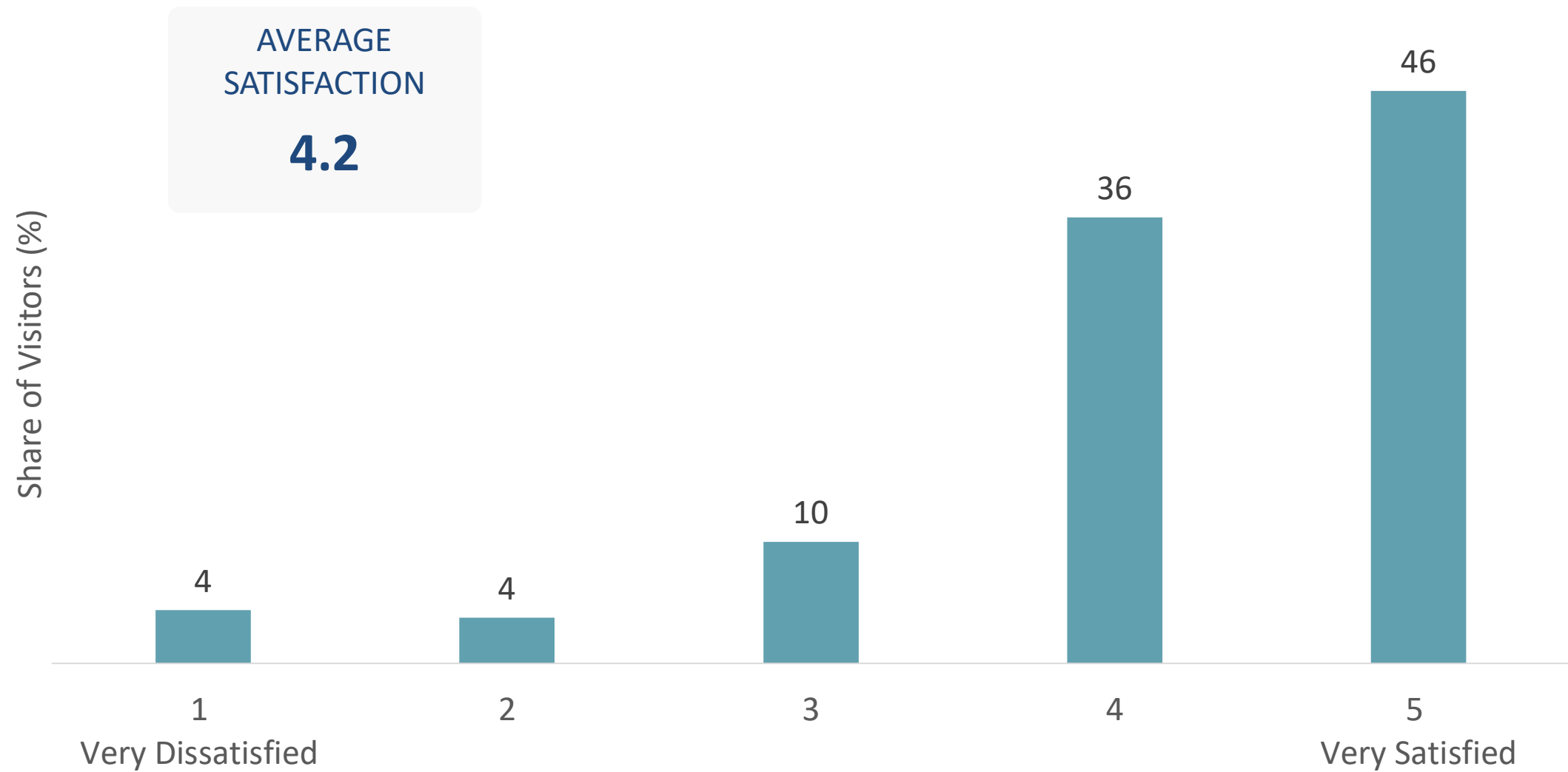


Visitor Spending
and Impact

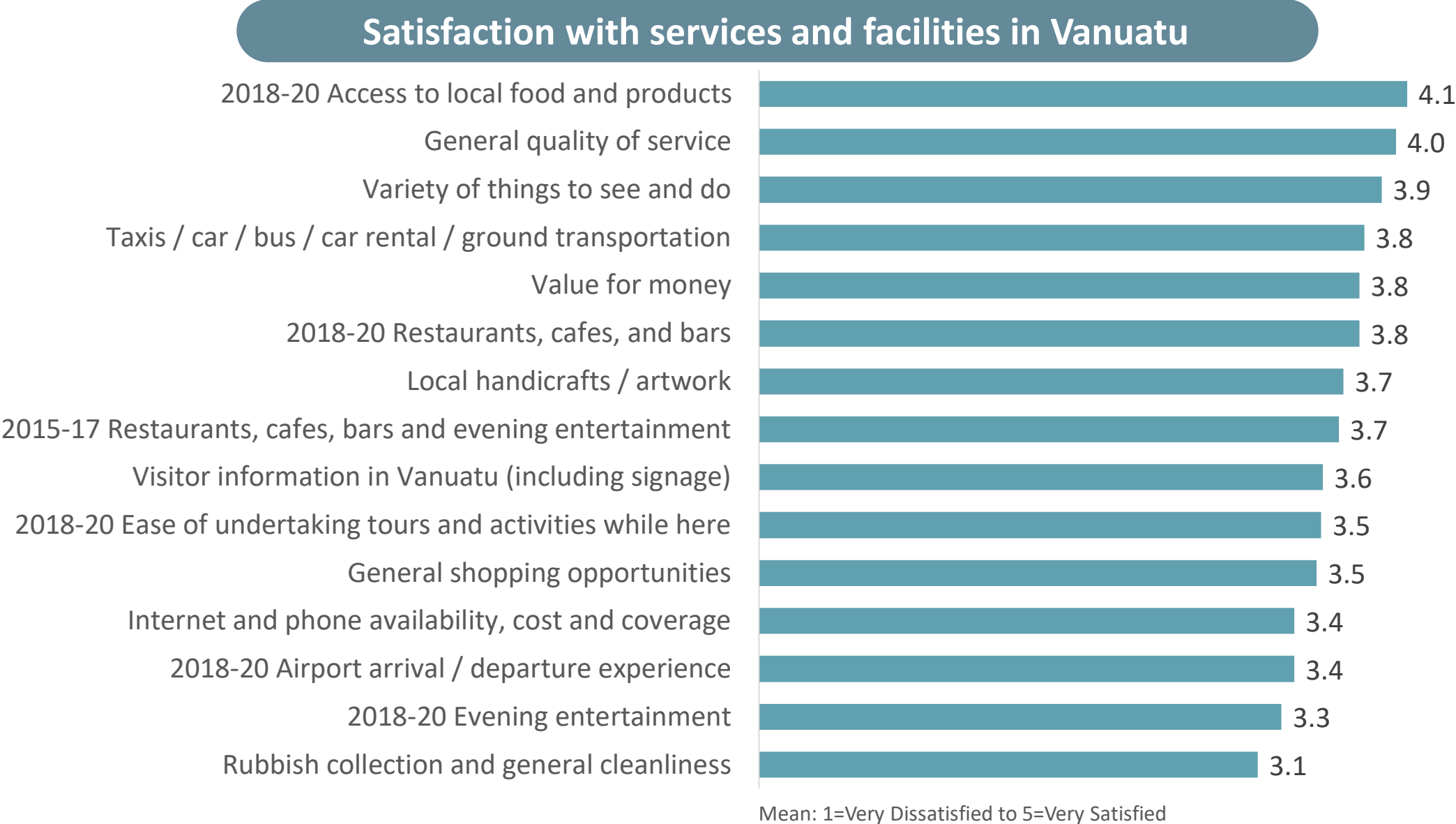


Visitor
Satisfaction

84% of NC visitors are satisfied or very satisfied with their overall experience in Vanuatu.

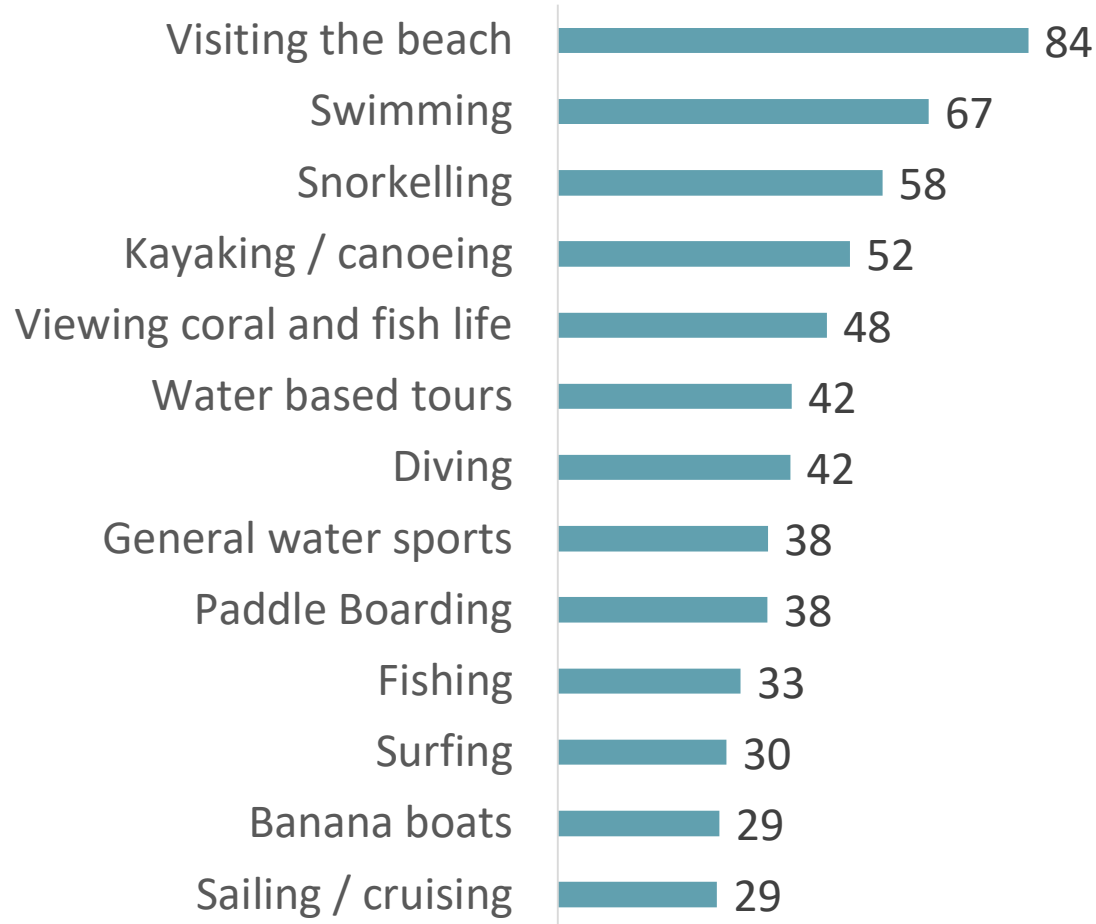


NC visitors are most satisfied with ‘access to local food’, ‘general quality of service’ and least satisfied with the ‘rubbish and general cleanliness’ of Vanuatu.



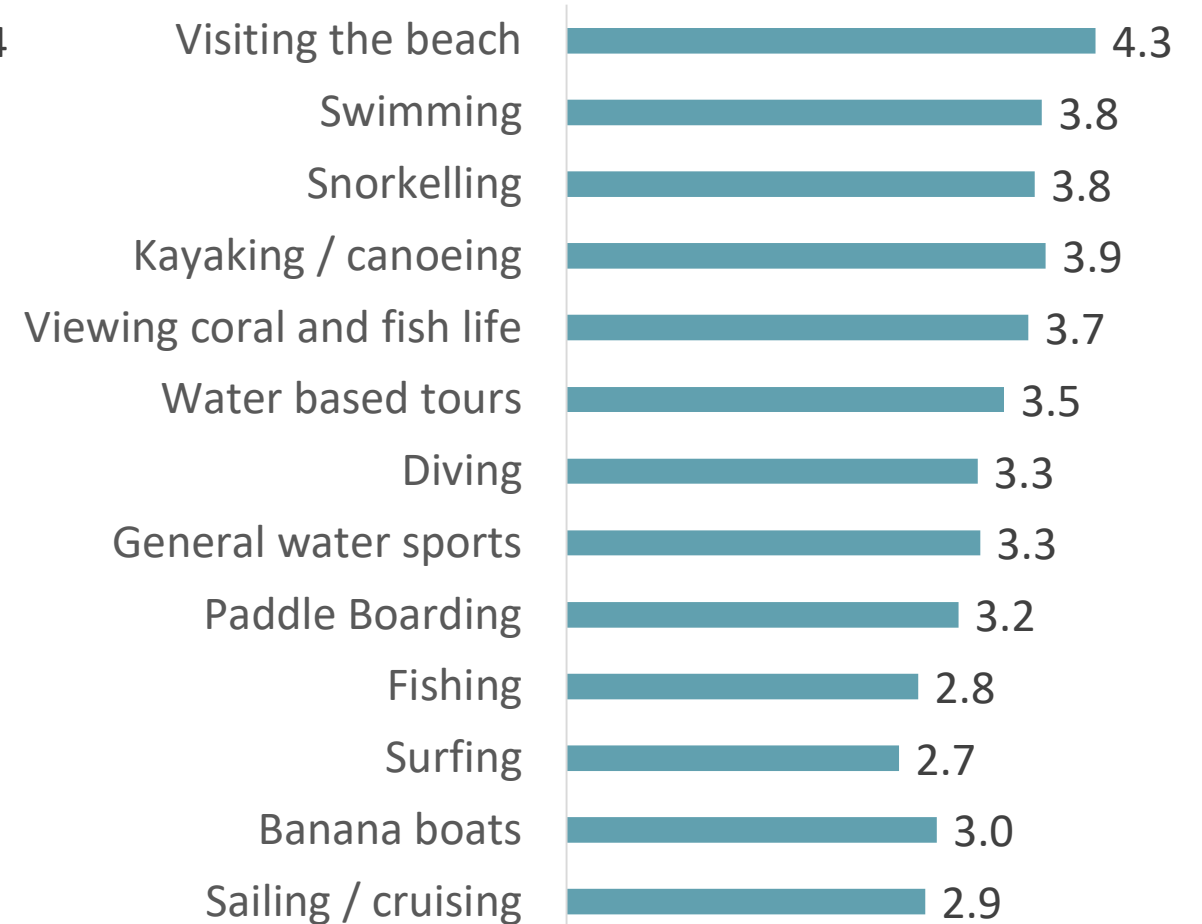
IVS 2018-2020: Water-based activities - participation and satisfaction

Participation Rate



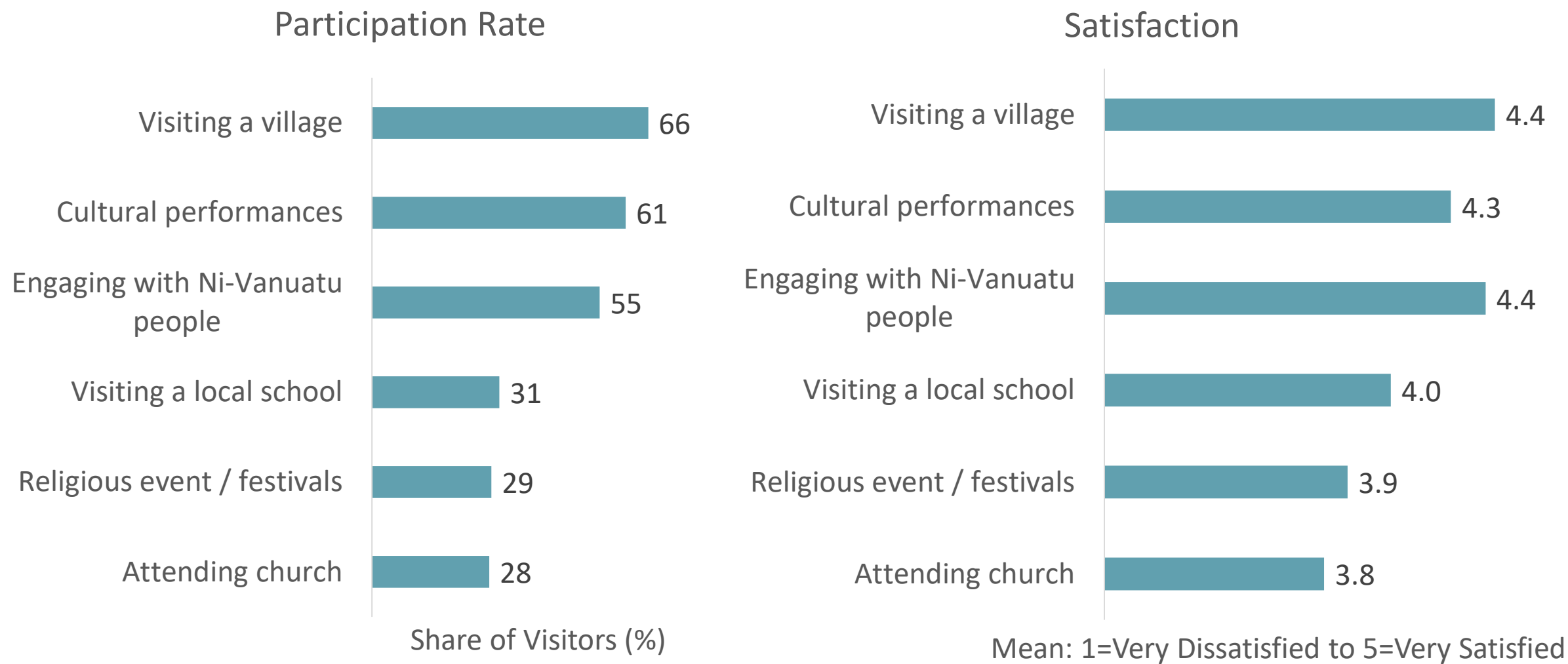
Share of Visitors (%)

Satisfaction



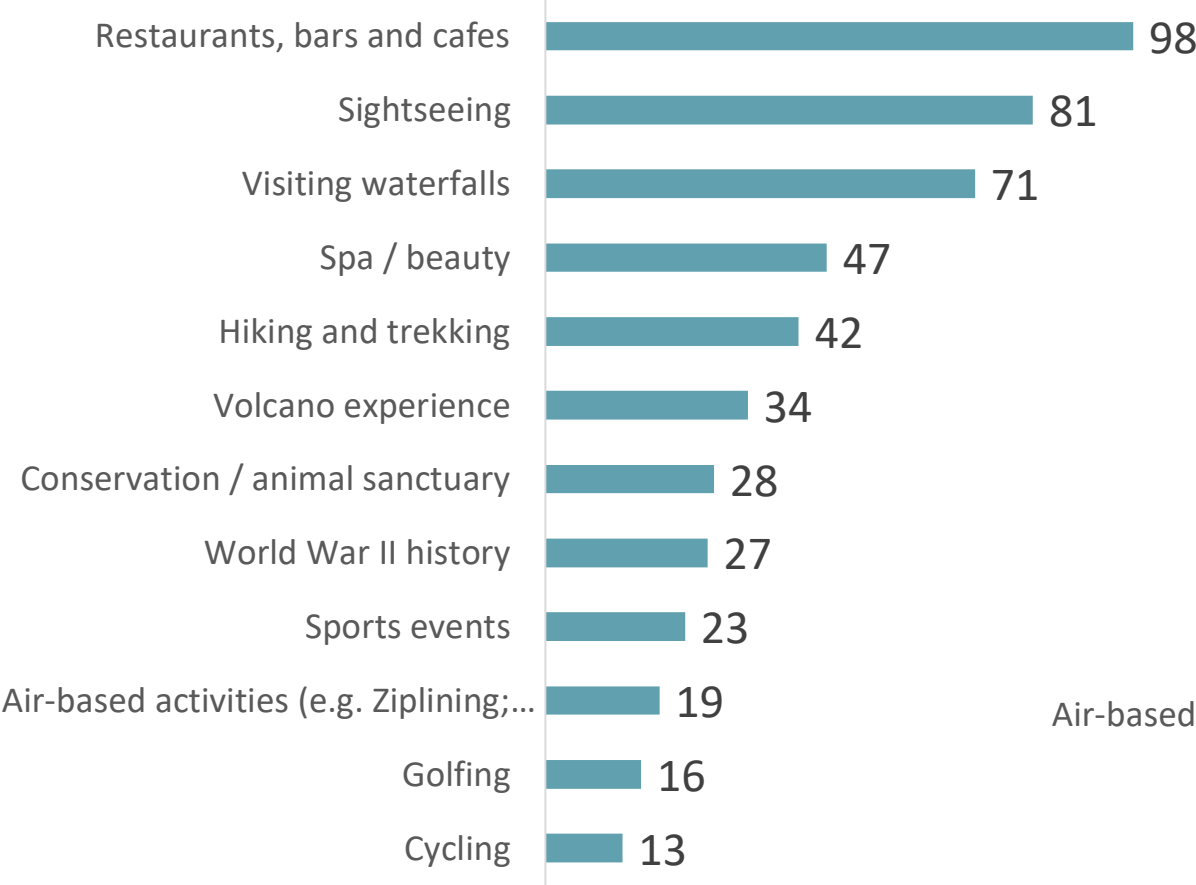
Mean: 1=Very Dissatisfied to 5=Very Satisfied

IVS 2018-2020: Cultural interaction activities - participation and satisfaction



IVS 2018-2020: Land-based activities - participation and satisfaction

Participation Rate



Share of Visitors (%)

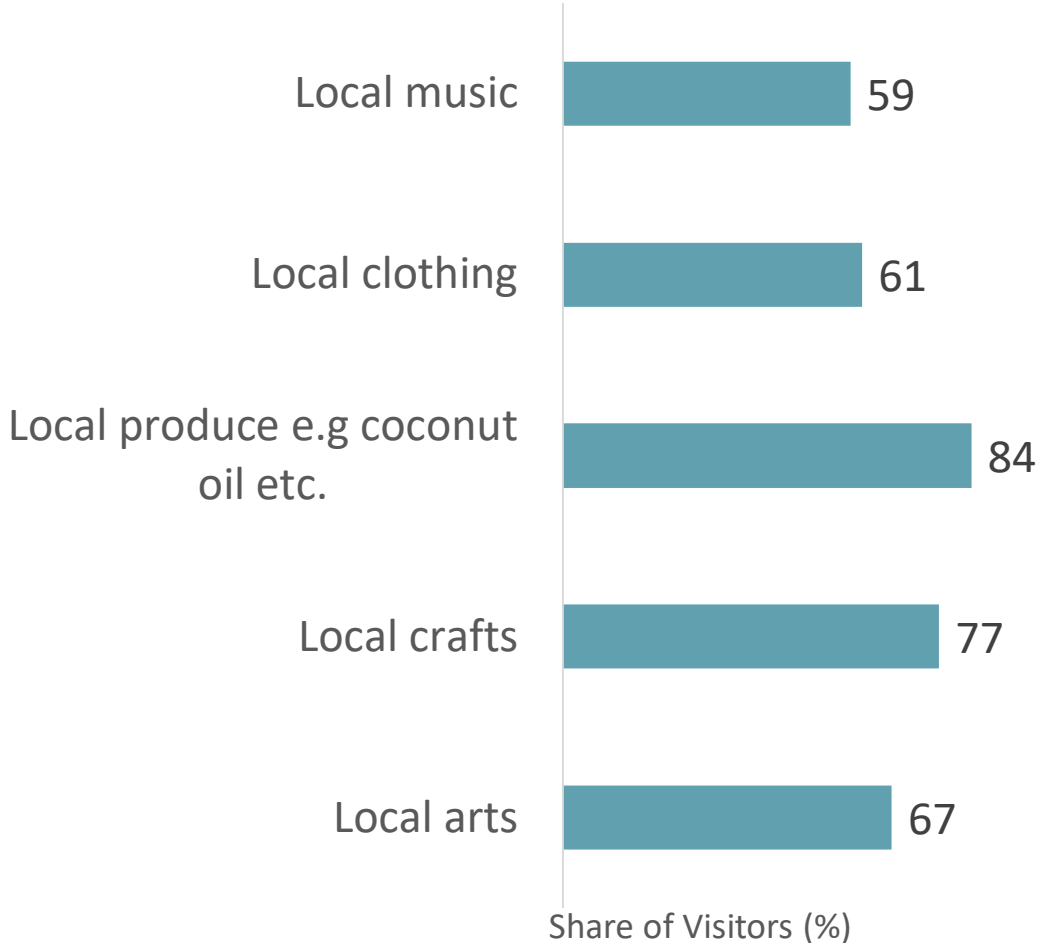
Satisfaction



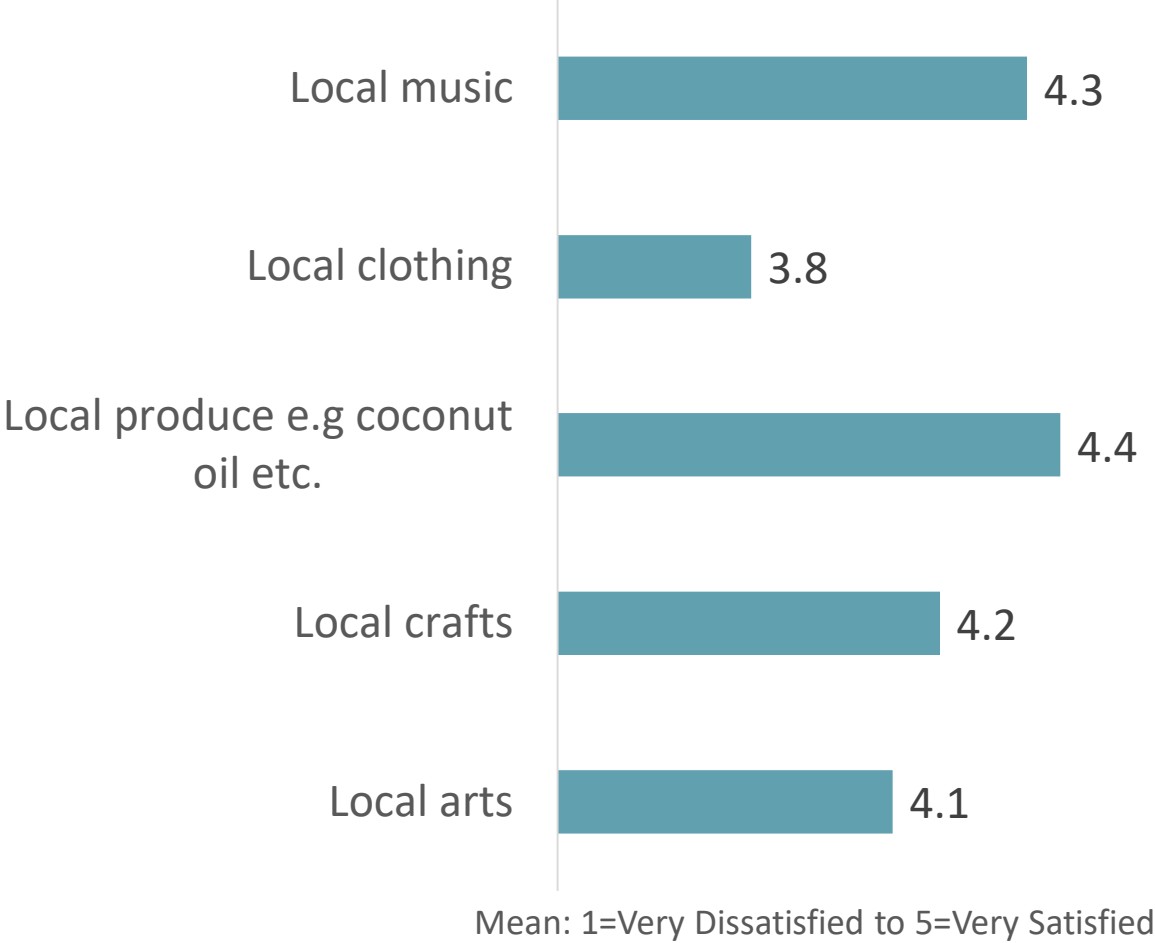
Mean: 1=Very Dissatisfied to 5=Very Satisfied

IVS 2018-2020: Shopping - participation and satisfaction

Participation Rate



Satisfaction



Most Appealing Aspects of the visit: activities, local people and environment dominate comments

Themes	OVERALL	2015 Annual	2016 Annual	2017 Annual	2018 Annual	2019 Annual	2020 Jan-Mar
Activities, attractions and entertainment, events	41.2%	36.2%	48.7%	46.2%	36.9%	38.2%	30.0%
Local people	39.4%	43.5%	36.1%	36.4%	37.6%	45.1%	38.0%
Environment, cleanliness, climate	17.5%	15.9%	27.2%	13.8%	18.4%	14.7%	12.0%
Atmosphere	10.0%	14.5%	3.2%	12.3%	9.2%	10.3%	18.0%
Culture and history	8.2%	10.1%	12.7%	6.7%	6.4%	5.9%	12.0%
Food and Beverage	8.0%	10.1%	12.0%	5.6%	8.5%	6.4%	6.0%
Level of service	6.1%	2.9%	5.1%	9.2%	5.7%	5.9%	4.0%
Accommodation	3.7%	5.8%	5.1%	2.6%	3.5%	1.0%	12.0%
Value for money	2.6%	1.4%	1.3%	0.5%	5.7%	3.9%	2.0%
Convenience	2.2%	1.4%	0.0%	2.6%	4.3%	2.5%	2.0%
Local market**	2.1%	0.0%	0.0%	0.0%	0.0%	7.4%	4.0%
Overall good experience	1.3%	0.0%	1.3%	1.5%	1.4%	1.5%	2.0%
New Developments**	1.1%	0.0%	0.0%	0.0%	2.8%	1.5%	4.0%
Not too commercial	0.7%	1.4%	0.0%	1.5%	0.0%	0.5%	2.0%
Cyclone *	0.7%	4.3%	1.3%	0.5%	0.0%	0.0%	0.0%
Safety	0.2%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%

Note: * themes from 2015-2017, ** themes from 2018-2020

Most appealing – indicative quotes:

Our whole experience was very very good. We definitely recommend Vanuatu...and we unfortunately ran into the early Cyclone Liua (I think it was called) so it stopped our water sports fun we were anticipating at Erakor, but that is not Vanuatu's fault.

The friendly nature of the people. Everyone was so warm and welcoming from the custom officials at the airport, to the local bus drivers, to the women at the market and just basically every passer by you met on the street - I've never felt so welcomed in foreign country before.

The people are so beautiful, friendly, warm and generous!

Ate at some good restaurants. Loved the accommodation and services it provided (free SUP).

The general friendliness and great local artwork.

Staying with a tribe and learning about the culture.

Staying in Tanna was brilliant. Had real insight into life in Tanna's communities. Learnt a lot, and obviously the volcano was incredible!

People and the Market and the Hotel services

The duty free shops, the people attitude and behaviour, the food quality

The volcano and the Efate daily tour.

Least Appealing Aspects: public services, infrastructure and activities dominate

Themes	OVERALL	2015 Annual	2016 Annual	2017 Annual	2018 Annual	2019 Annual	2020 Jan-Mar
Public services, facilities and infrastructure	19.7%	31.0%	21.5%	18.4%	23.4%	14.1%	12.8%
Attractions and activities	16.9%	10.3%	20.0%	19.0%	12.5%	18.6%	15.4%
Shops and the shopping experience	10.5%	8.6%	14.1%	9.8%	9.4%	9.6%	10.3%
Price of goods and services	9.9%	17.2%	8.9%	8.0%	7.8%	12.8%	5.1%
Port Vila	7.5%	3.4%	11.1%	8.6%	5.5%	6.4%	7.7%
Rubbish, cleanliness and natural environment care	7.2%	10.3%	6.7%	4.3%	7.8%	9.6%	5.1%
Local people, standard of service	6.3%	5.2%	6.7%	4.9%	5.5%	9.6%	2.6%
Accommodation	5.0%	6.9%	4.4%	4.9%	4.7%	5.1%	5.1%
Social divide and social issues	4.6%	3.4%	2.2%	3.7%	11.7%	1.9%	5.1%
Airport and flight related issues	3.7%	5.2%	1.5%	2.5%	3.9%	5.8%	5.1%
Food and beverage	3.2%	0.0%	5.9%	3.1%	3.1%	1.9%	5.1%
Bus, rental cars, scooters or transport	3.1%	0.0%	1.5%	2.5%	3.9%	5.8%	2.6%
Safety-related issues	2.2%	3.4%	3.7%	0.6%	1.6%	2.6%	2.6%
Weather	1.8%	1.7%	0.0%	1.8%	3.1%	1.3%	5.1%
Chinese influence**	1.8%	0.0%	0.0%	0.0%	0.0%	7.1%	2.6%
Too touristy	1.3%	3.4%	0.0%	1.2%	2.3%	1.3%	0.0%
Cruise ships	0.6%	0.0%	0.7%	0.6%	0.8%	0.6%	0.0%
Other tourists	0.4%	0.0%	1.5%	0.0%	0.8%	0.0%	0.0%
Stray animals and mosquitos, diseases	0.3%	0.0%	0.7%	0.0%	0.0%	0.6%	0.0%
Cyclone*	0.3%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%

Note: * themes from 2015-2017, ** themes from 2018-2020

Least appealing – indicative quotes

Public transportation and some of the sights e.g buildings.

Probably the bus services, I mean these buses are way too old.

Rubbish around the areas and the rough roads into some areas where locals live.

The town is dusty. Going to night club was not very safe.

Food at the hotel where we stayed, they did not have adequate fresh food for breakfast, the hotel did not put forward and promote nor use local FRESH food in their dishes.

Port Villa seemed quite dirty and 'touristy' with high-end shopping. It's obvious Port Villa has been set up for tourists which I think had overshadowed the beauty of Vanuatu.

The kava price had gone up and local painted art is ridiculously highly priced

A lot of shops are closed on Sunday. The museum/Cultural Centre was not attractive enough for the visitors and rather expensive.

Everything is so expensive compared to the life of the people, no cheap hotels no cheap restaurants. Every tourist is considered as a rich tourist.

Suggestions for Improvement: public services/infrastructure dominate

Themes	OVERALL	2015 Annual	2016 Annual	2017 Annual	2018 Annual	2019 Annual	2020 Jan-Mar
Public services and infrastructure	36.0%	28.1%	33.9%	39.5%	42.9%	29.6%	46.7%
Entertainment, activities, transport	17.8%	18.8%	15.3%	14.8%	12.7%	25.9%	20.0%
Charges, entrance fee, value for money	13.6%	12.5%	11.9%	22.2%	9.5%	11.1%	6.7%
Local People, Standards of Service	8.8%	3.1%	15.3%	7.4%	4.8%	9.9%	13.3%
Environment (cleanness, rubbish, nature)	8.2%	3.1%	11.9%	6.2%	11.1%	8.6%	0.0%
Accommodation	7.3%	15.6%	8.5%	7.4%	6.3%	3.7%	6.7%
Flight Related Issues	6.9%	18.8%	5.1%	9.9%	1.6%	6.2%	0.0%
Shopping experience	5.1%	9.4%	8.5%	2.5%	6.3%	1.2%	13.3%
Food quality and price	4.2%	0.0%	6.8%	4.9%	1.6%	4.9%	6.7%
Social issues	3.6%	0.0%	0.0%	0.0%	9.5%	6.2%	6.7%
Safety	0.9%	3.1%	0.0%	0.0%	1.6%	1.2%	0.0%
Weather	0.6%	0.0%	0.0%	1.2%	1.6%	0.0%	0.0%
Tourism development**	0.3%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%

Suggestions for improvements – indicative quotes

Air-conditioning at the airport.

Use local fresh food in the hotel menu, and add more water sports .

Improve the quality of hotel rooms - get rid off noisy ,rude and obnoxious tourists

Cleanliness of town. I am still suffering form sinus problems caused by the amount of dust in the air.

More information about the possibilities of tours or visits in Port-Vila

Arrived at Bauerfield there's no baby facility so I have to change my baby on the bench.

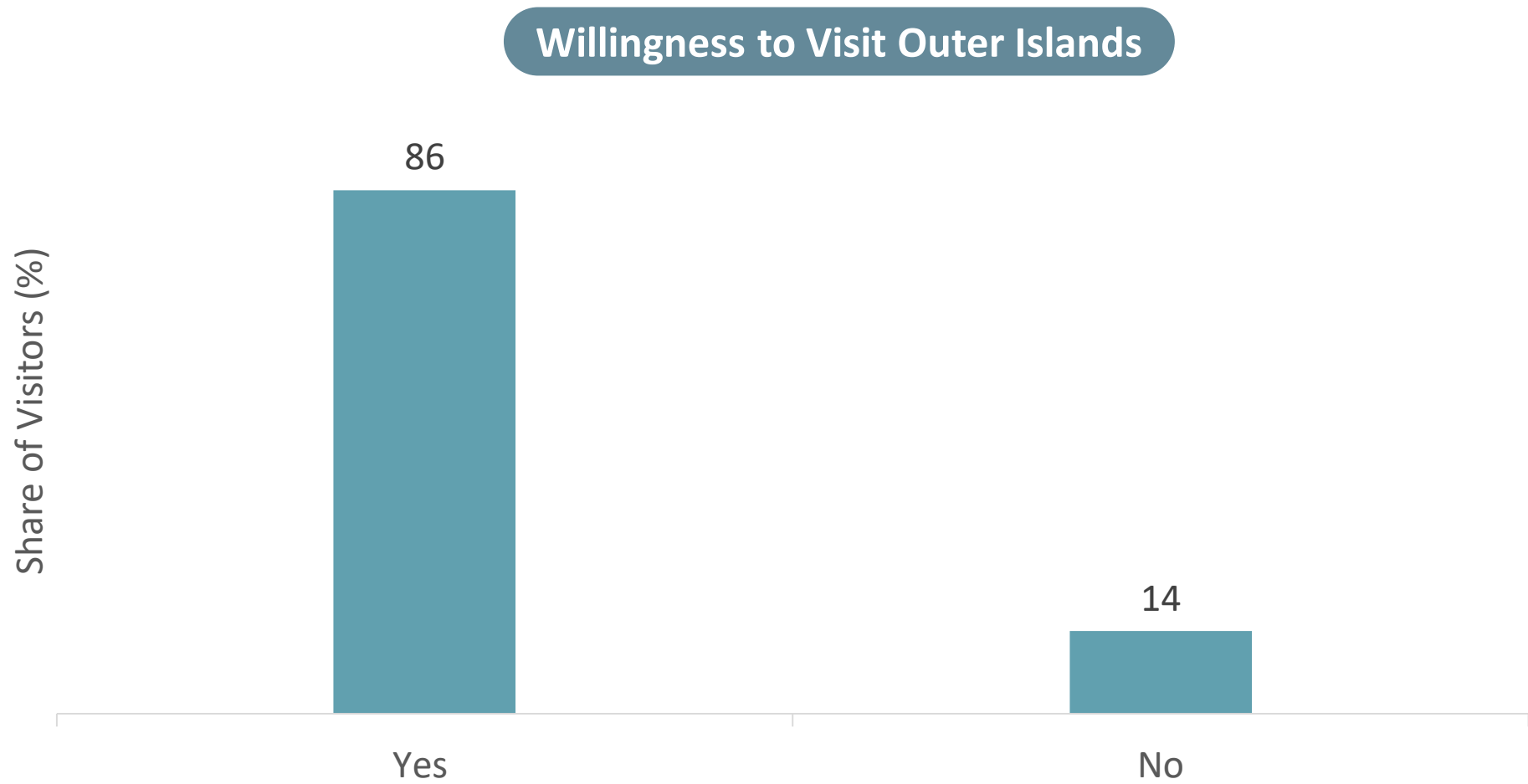
Wi-Fi (not available and expensive)

Fix the roads.

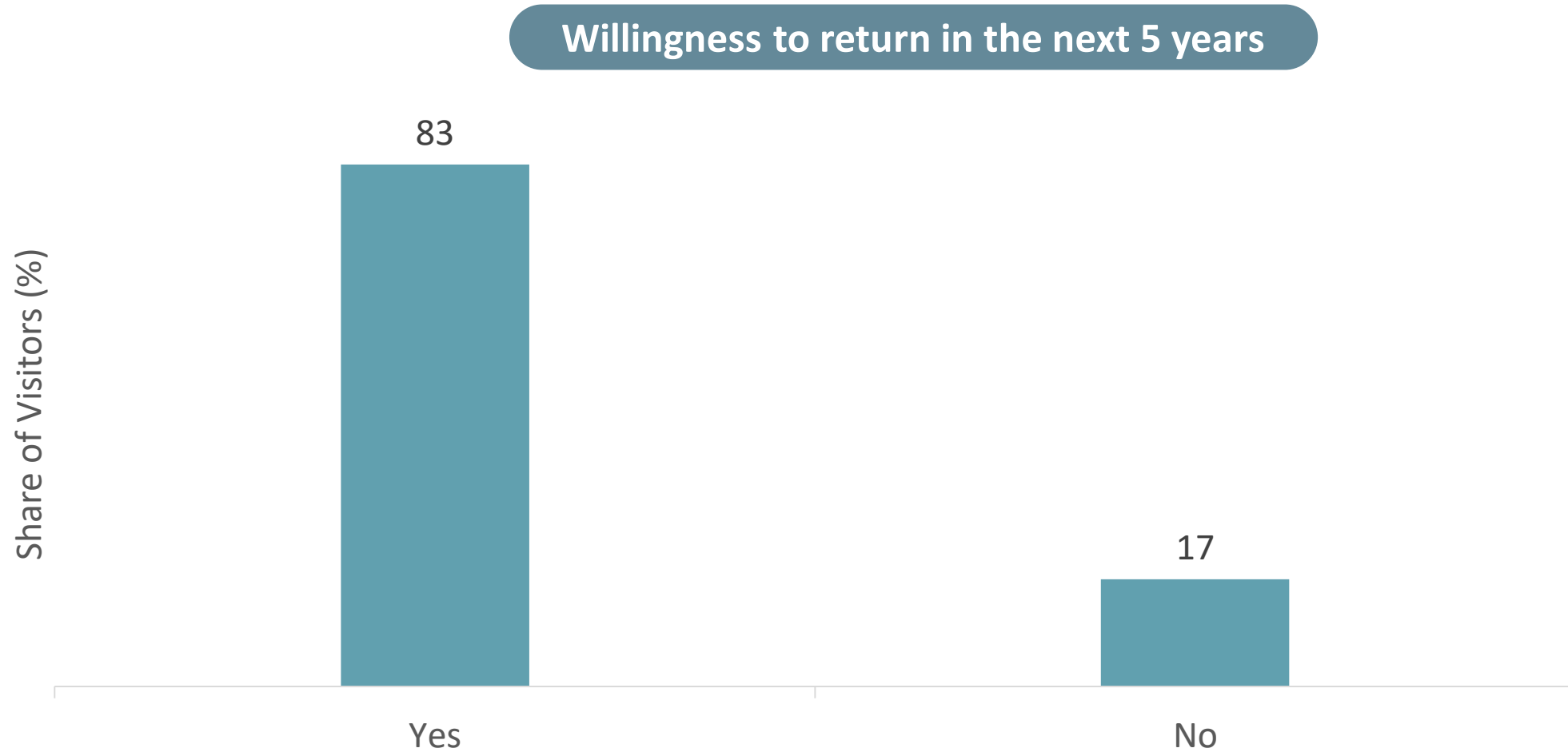
Better service in the hotel.

More international flights during the week.

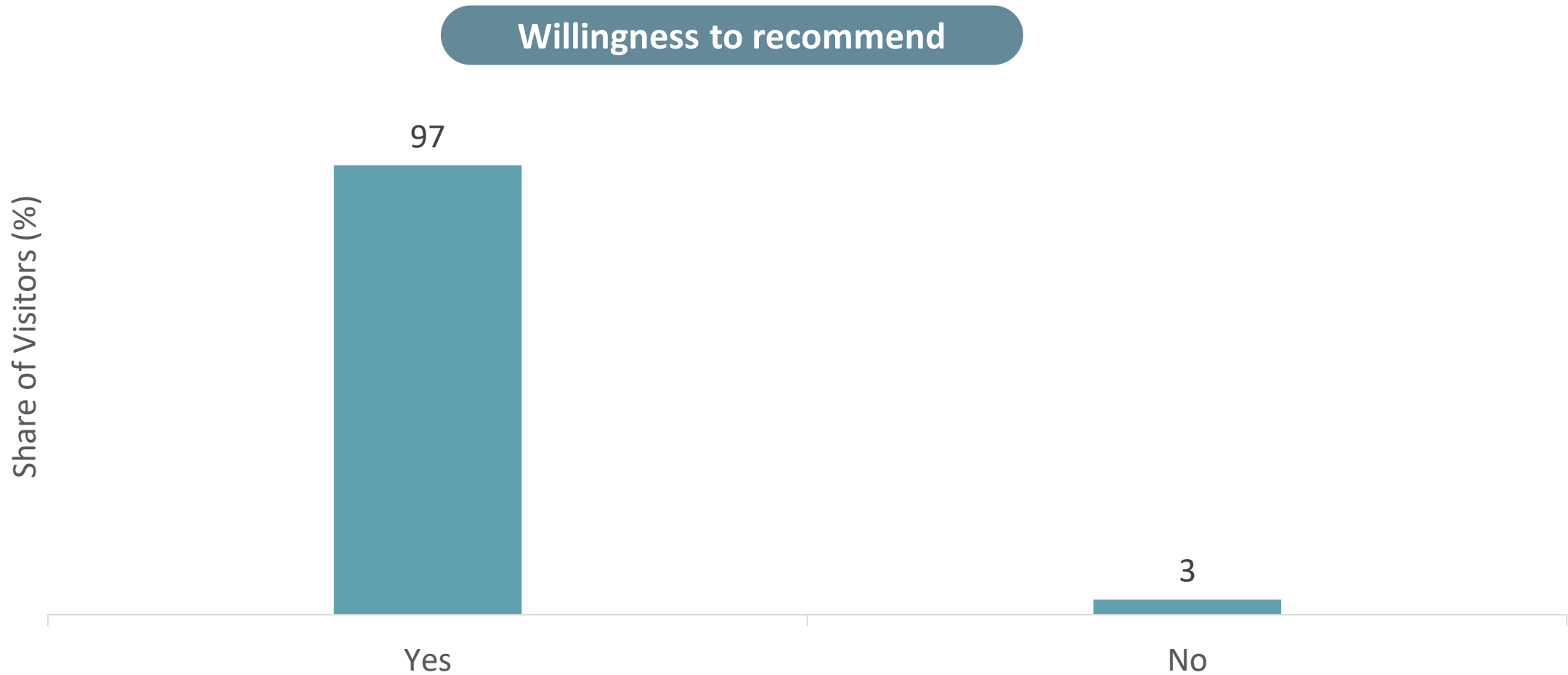
Most NC visitors say that they would like to visit outer islands on their next visit to Vanuatu.



NC visitors have a high willingness to return in the next five years.



IVS 2018-2020: Almost all NC visitors express a willingness to recommend Vanuatu to others.



An aerial photograph of a tropical coastline. On the left, a dense, lush green forest of palm trees and other tropical vegetation covers a landmass. A narrow, curved strip of white sandy beach separates the forest from the ocean. The water is exceptionally clear, showing various shades of turquoise and deep blue, with visible coral reefs and sandy patches beneath the surface. The overall scene is bright and vibrant, suggesting a healthy, natural environment.

Thank you

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