

# Yap Visitor Survey and Regional Examples

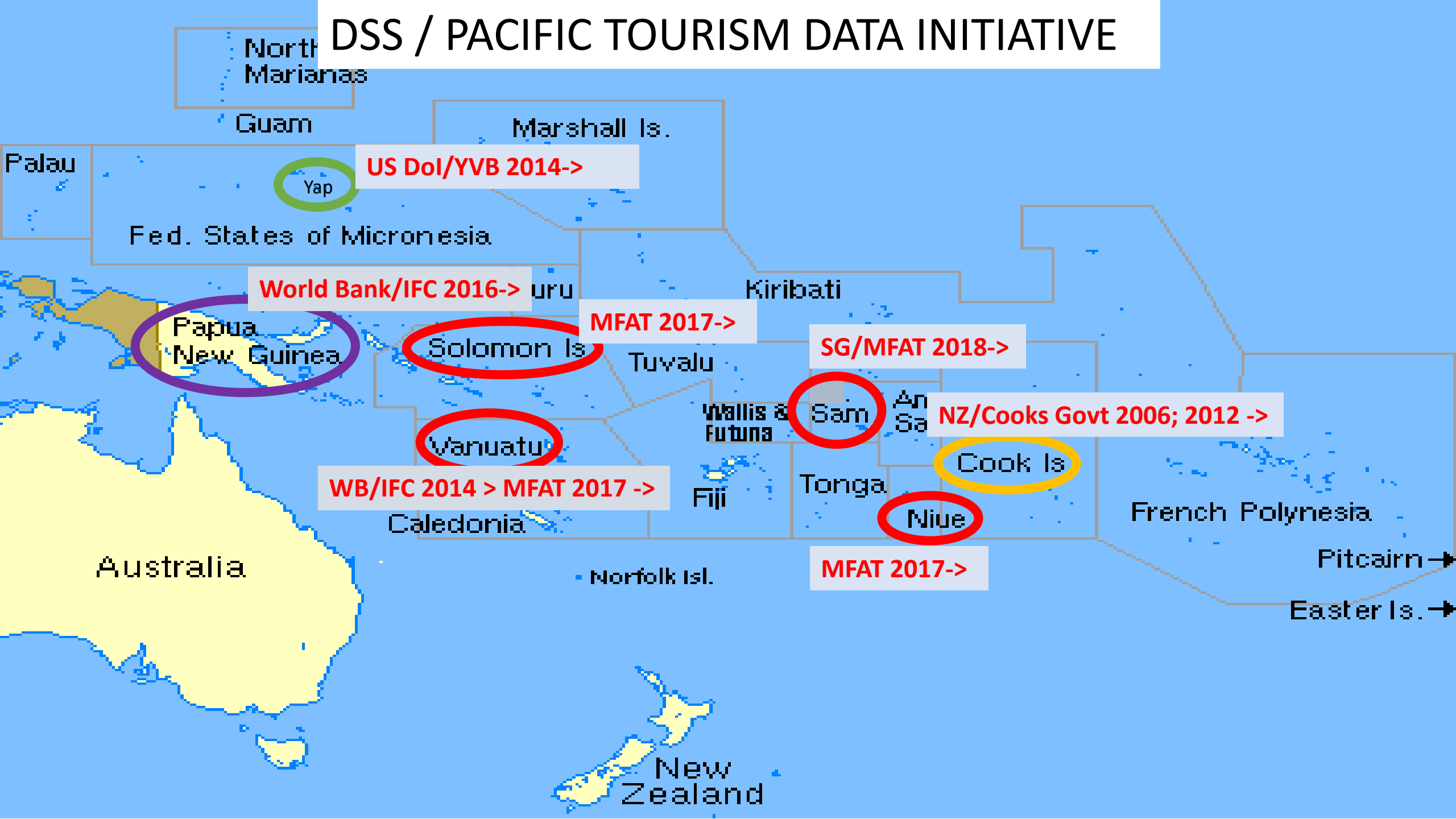
## January 2015 – December 2018

Presentation to the Yap Visitors Bureau Board, Colonia, Yap, August 14



**AUT**

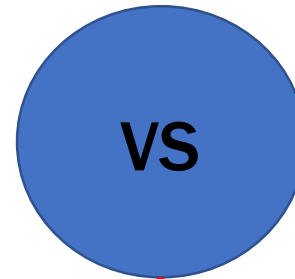
# DSS / PACIFIC TOURISM DATA INITIATIVE



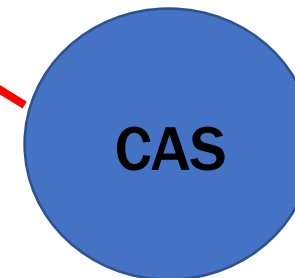
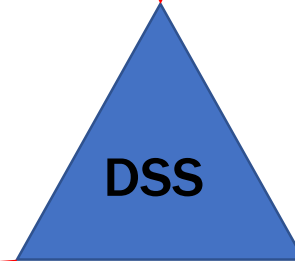
# THREE PILLARS OF A DECISION SUPPORT SYSTEM

Improve insight, quality and  
yield.....

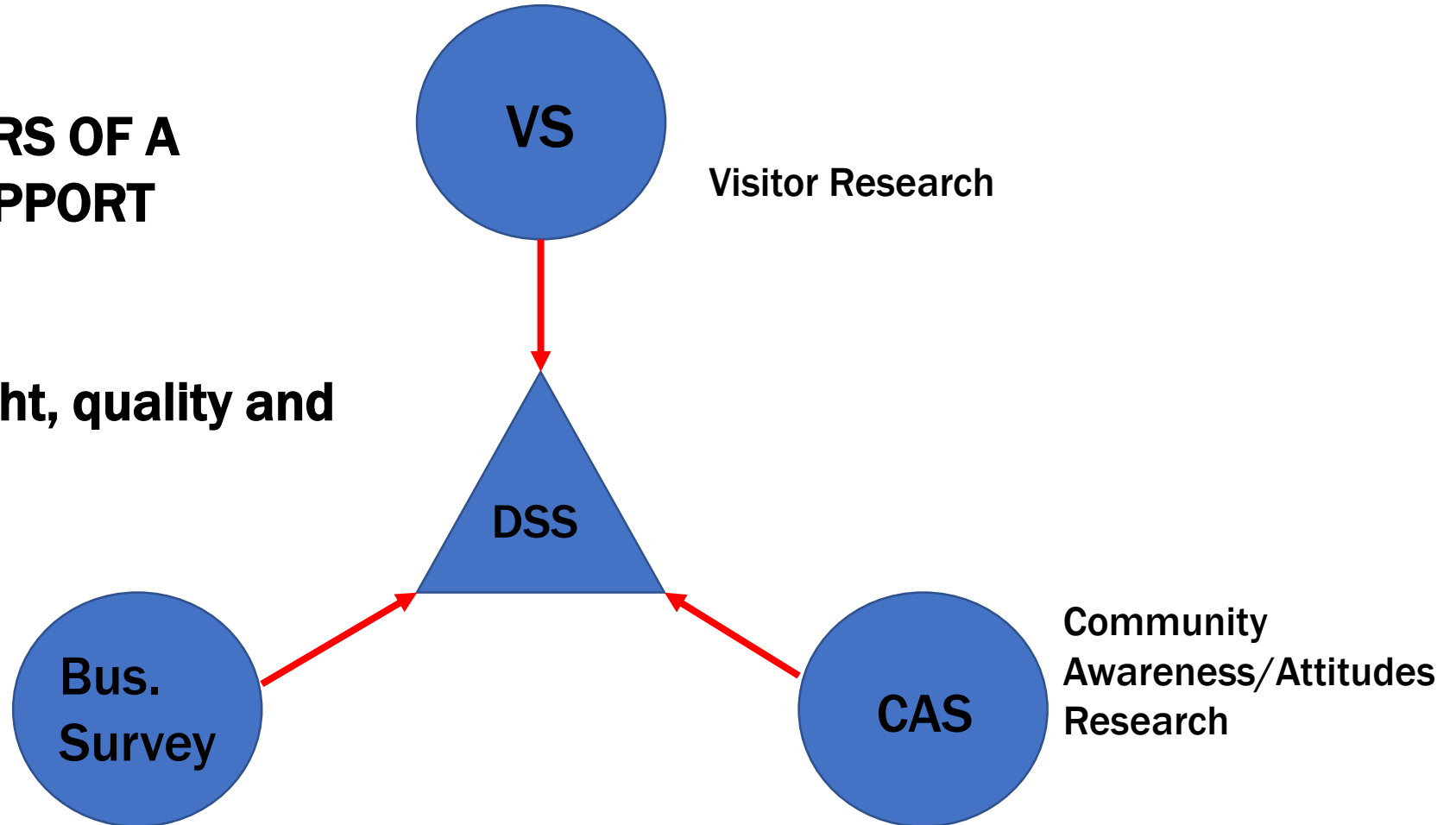
Business  
Research



Visitor Research



Community  
Awareness/Attitudes  
Research



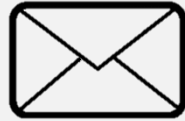




**Airport**  
**Wi-Fi**

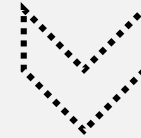
powered by **WIRELESS CITY**  BY THE AIRPORT

# January 2015 - December 2018 Respondents

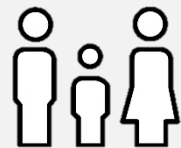


Total number of e-mails sent: **1678**

**CONVERSION RATE OF 17%**



Total number of responses: **290**



Responses cover a total of  
**380 adults** and **31 children**



The characteristics of  
visitors to Yap



# Visitor Characteristics

## PURPOSE OF VISIT



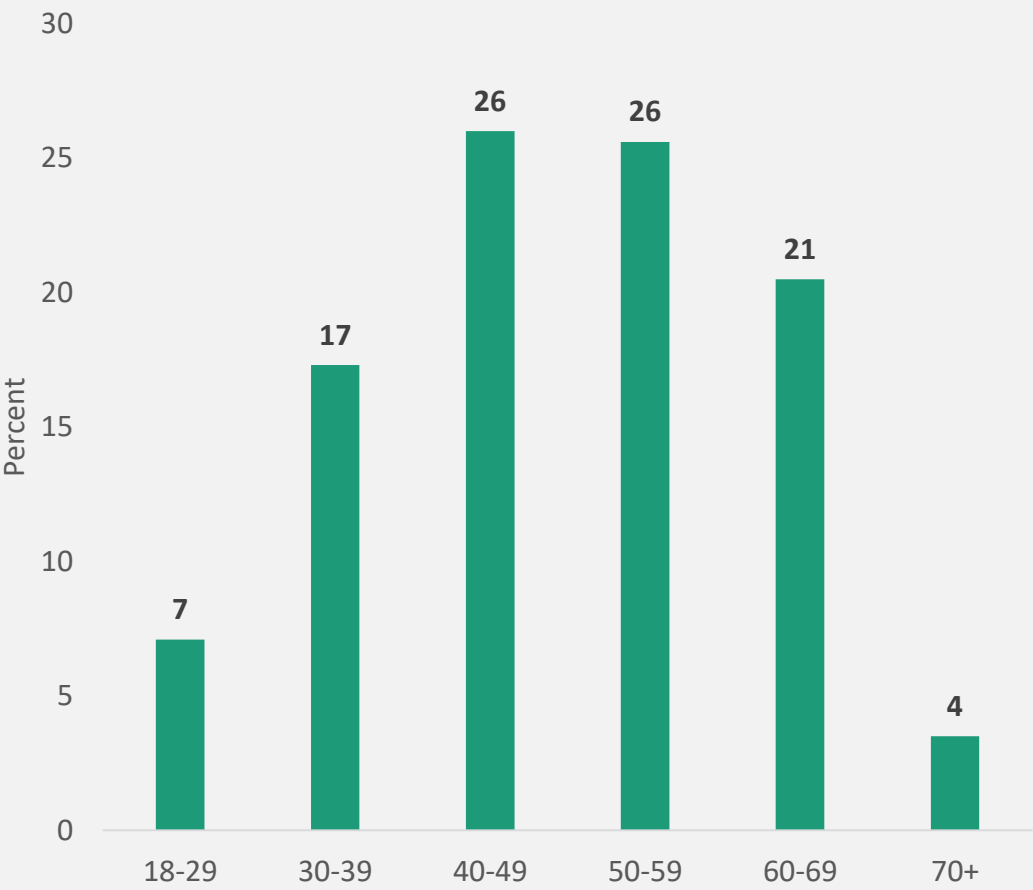
- 54% Holiday
- 31% Business/Conference
- 6% Visiting friends or relatives
- 5% Attend an event
- 2% Education
- 1% Volunteering
- 1% Honeymoon

## HIGHEST QUALIFICATION



- 85% Tertiary qualification
- 9% High school qualification
- 6% Other qualification

## DISTRIBUTION OF AGE AND GENDER





# Visitor Characteristics - Regional Comparisons

Country/State	Tertiary Ed	% Holiday	60-70	70+
Cook Islands	69	80	22	8
Niue	71	75	14	4
<b>Yap</b>	<b>85</b>	<b>54</b>	<b>21</b>	<b>4</b>
Samoa	75	54	15	4
Vanuatu		71	15	4
PNG		33	19	5
Solomon Is	86	23	19	5

# Country of origin

## COUNTRY OF ORIGIN



**55%** North America

**15%** Pacific countries

**14%** Asia

**11%** Europe

**4%** Australia

**1%** Other

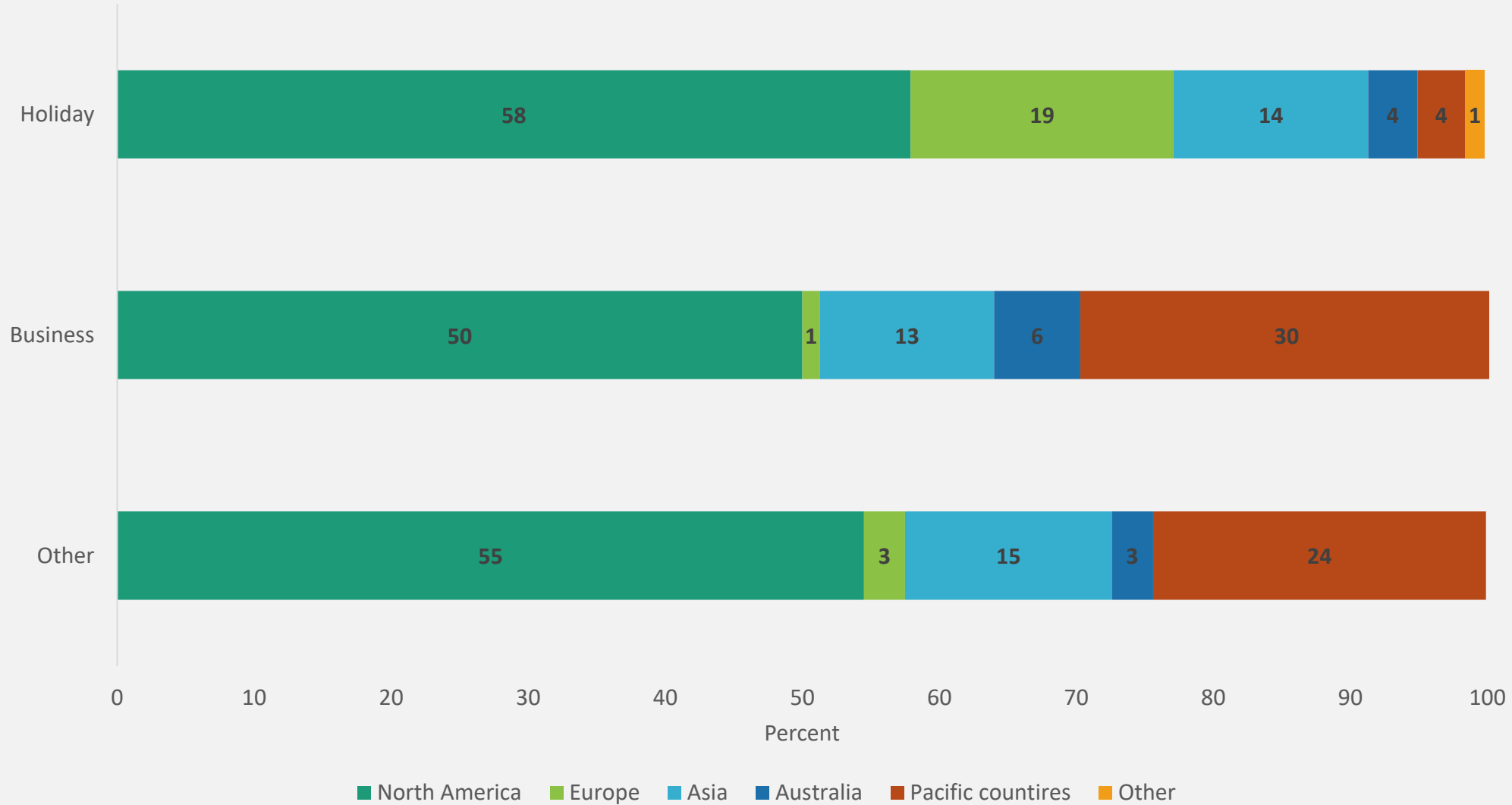
FSM **10%** (78% from Pohnpei)

Palau **3%**

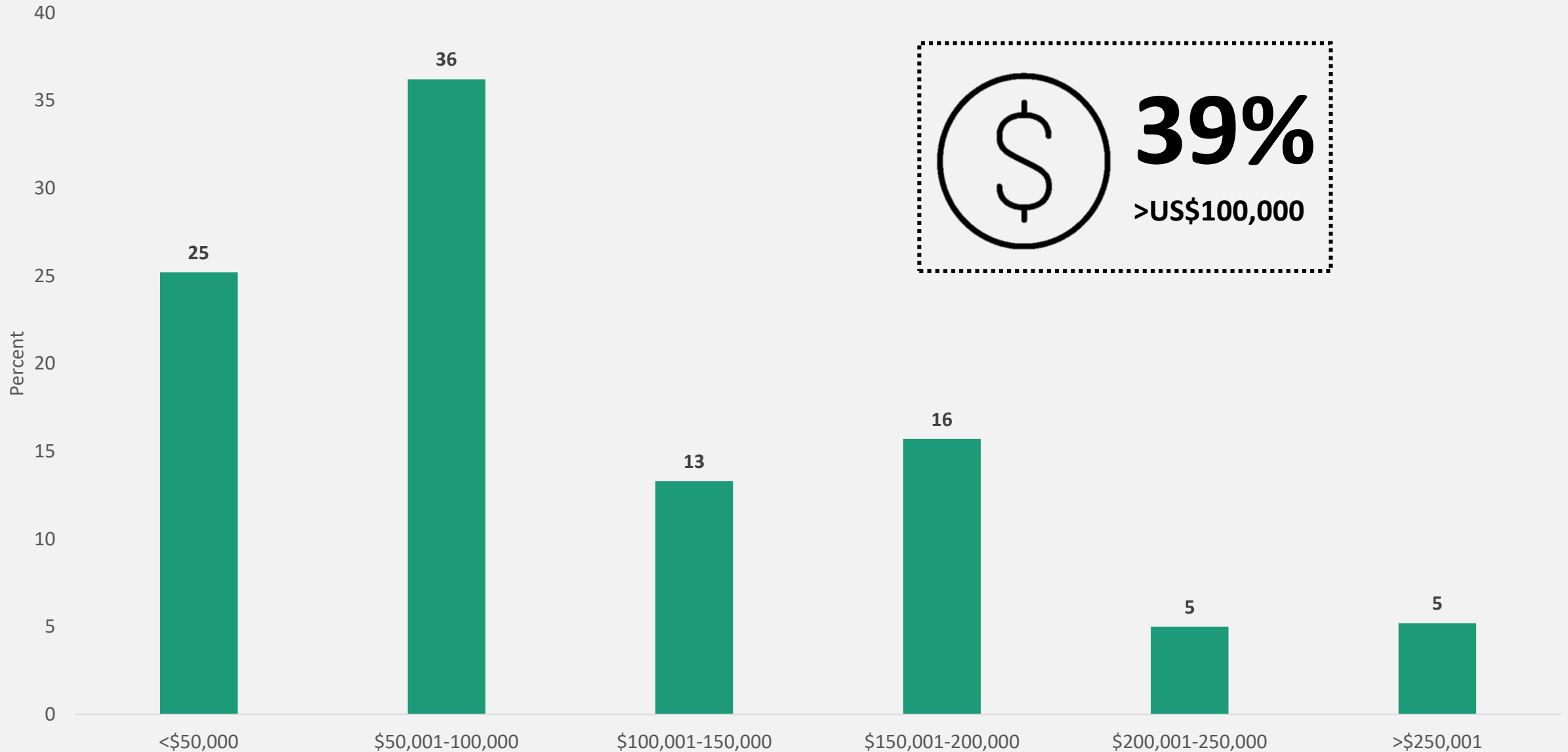
Marshall Islands **1%**

Fiji **1%**

# Country of origin

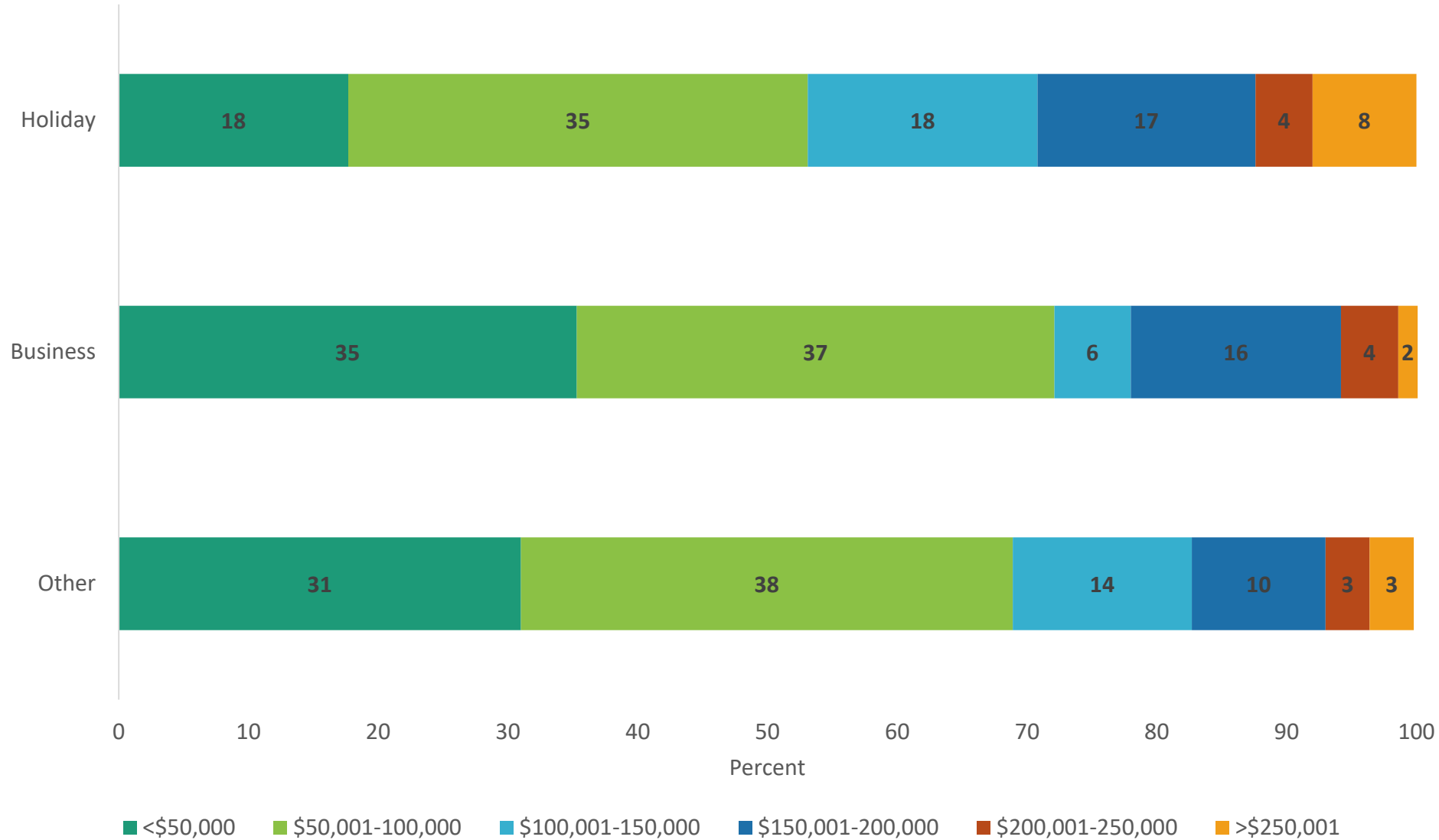


# Annual household income

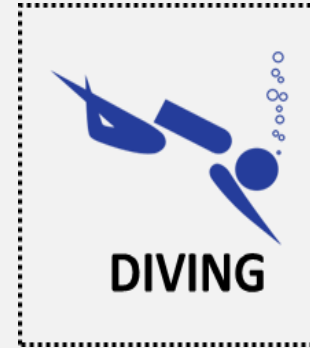




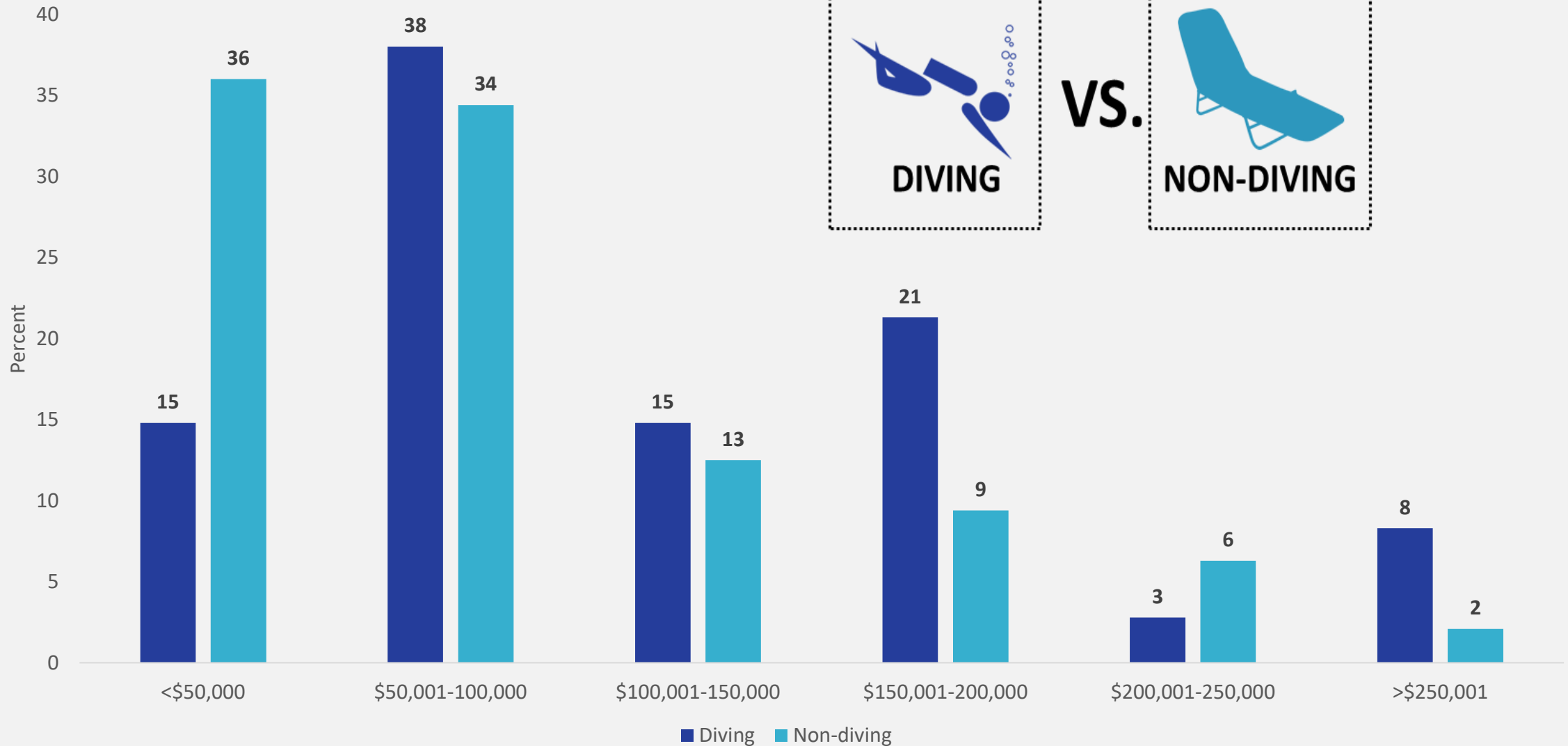
# Annual household income comparison



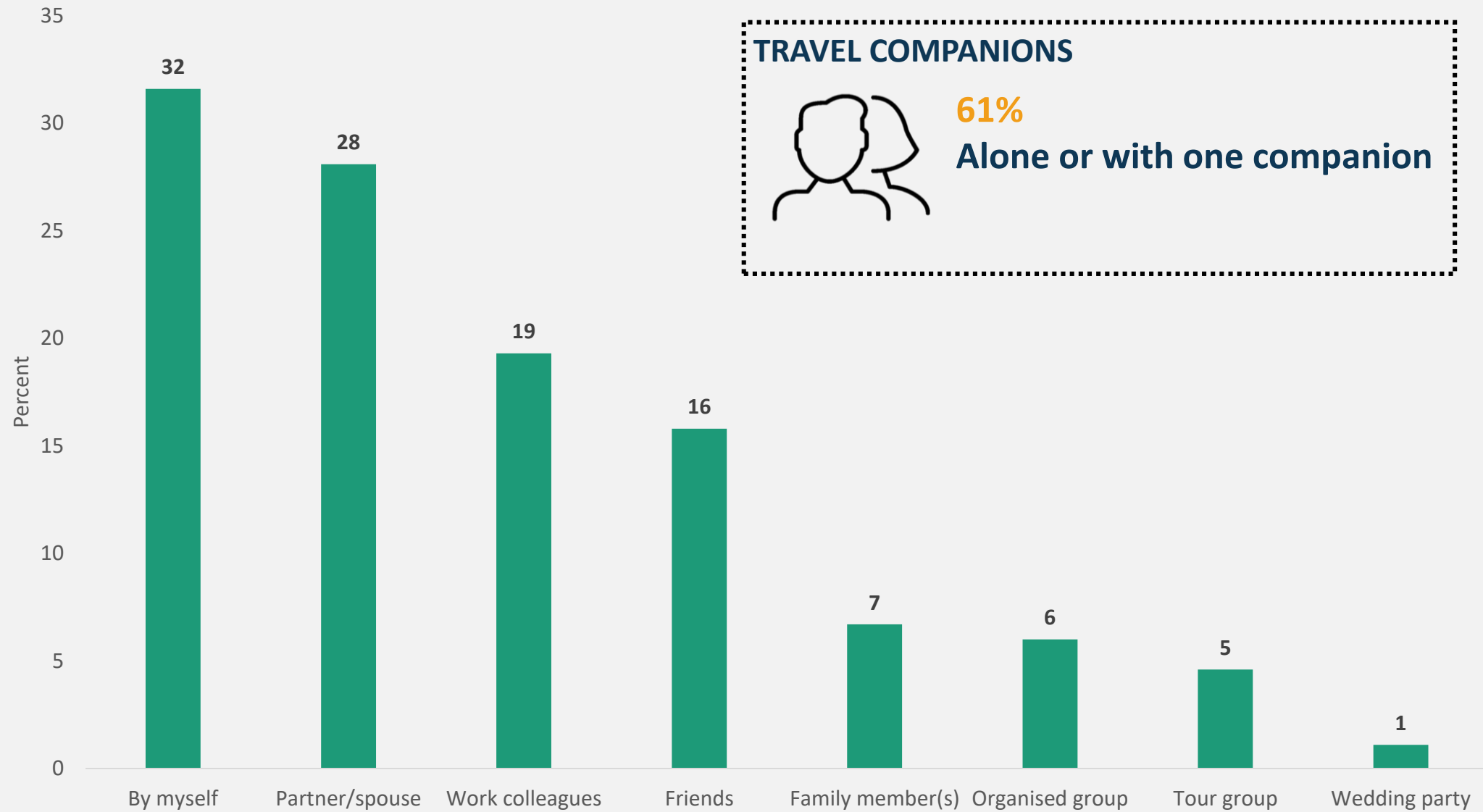
# Annual household income comparison



VS.

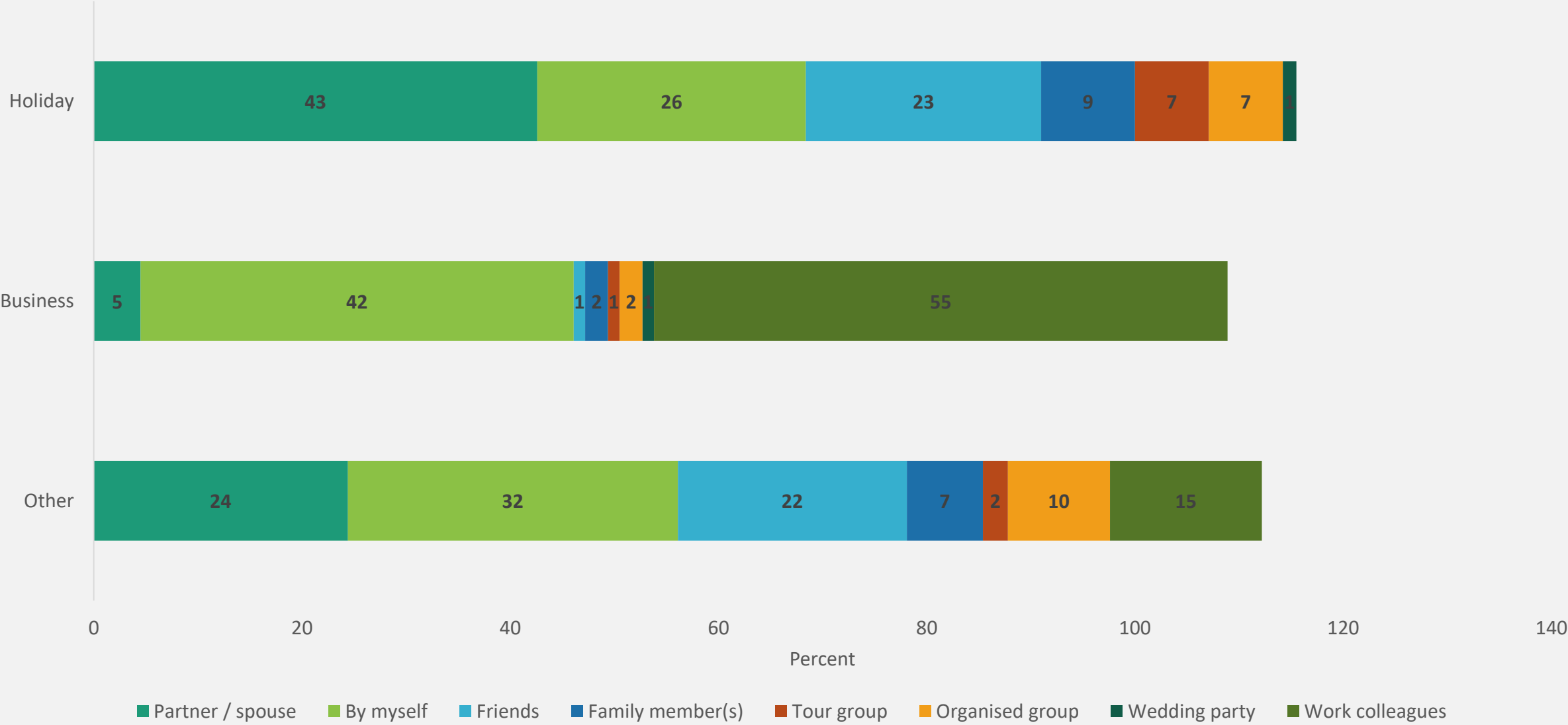


# Travel companions



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

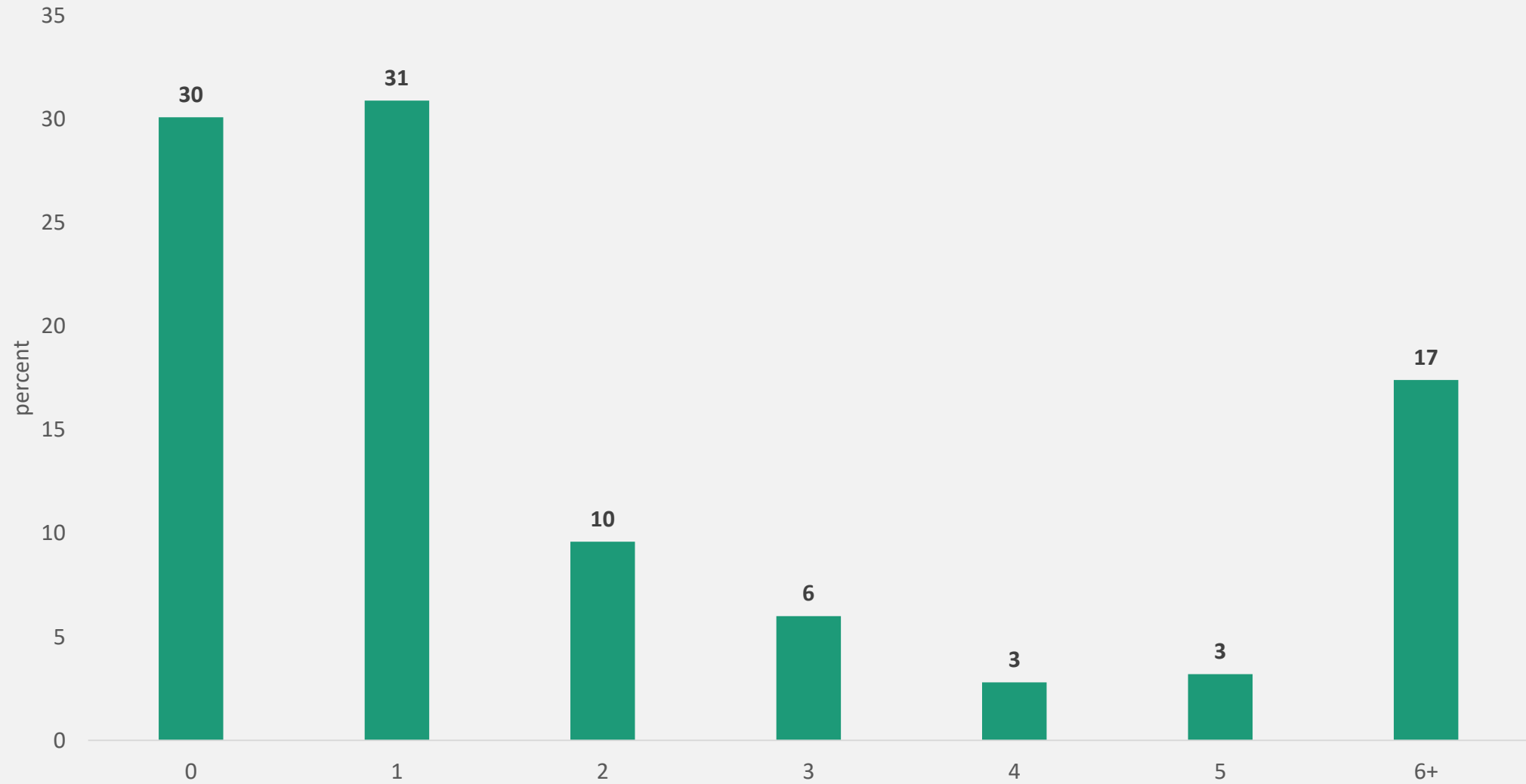
# Travel companions



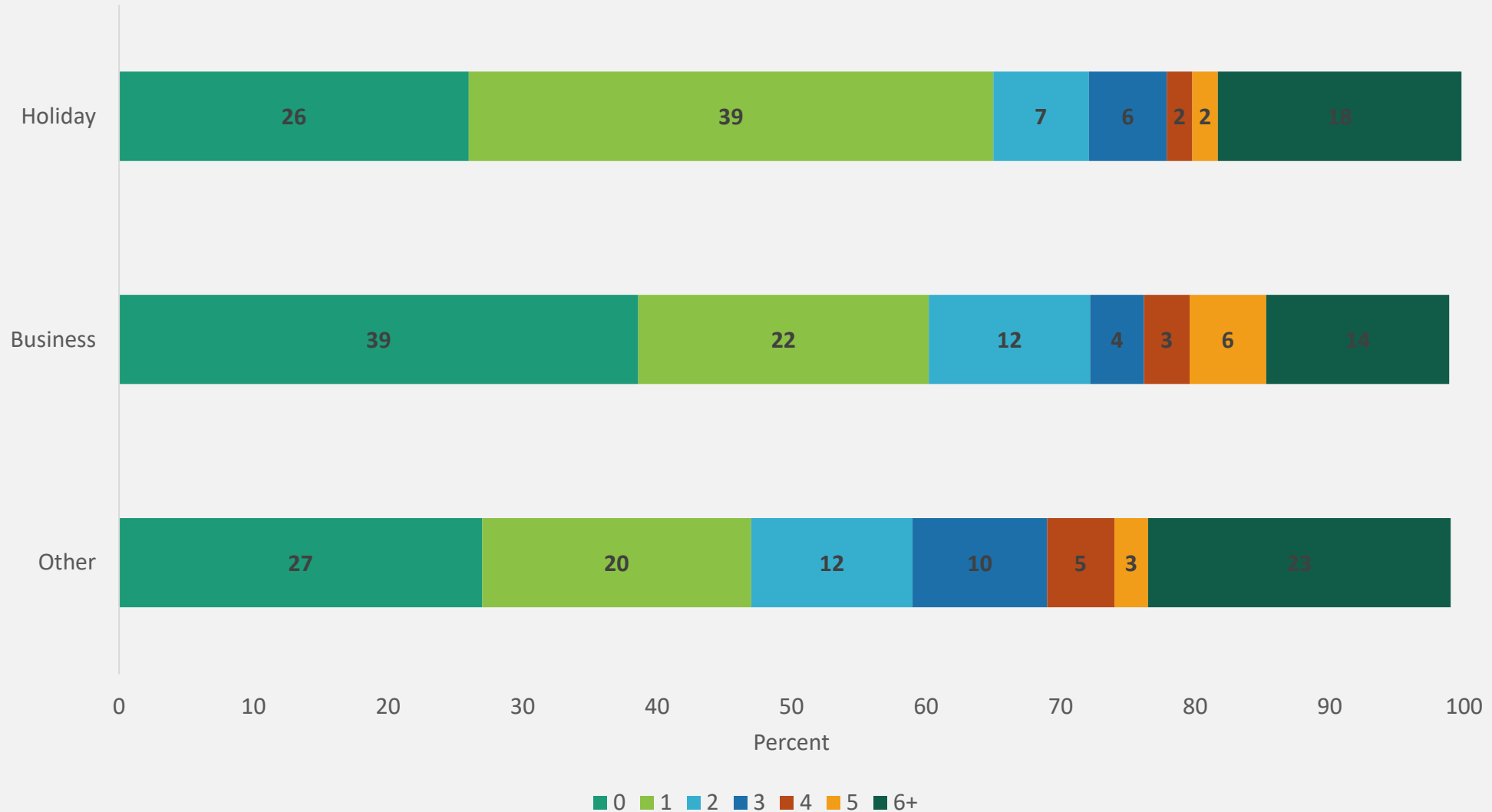
*Note: Multiple responses, therefore total does not add up to 100%*



# How many people accompanied you



# How many people accompanied you

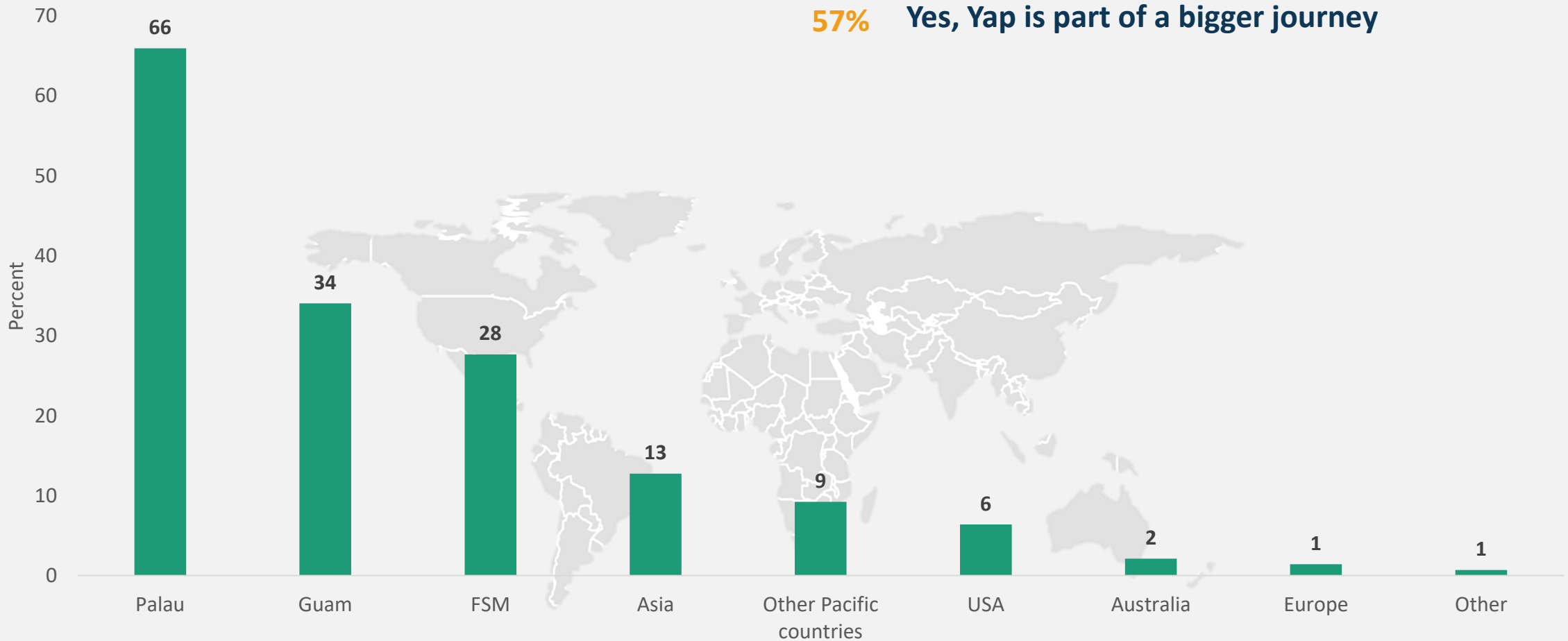


# Destinations included in the trip

## PART OF A BIGGER TRIP?

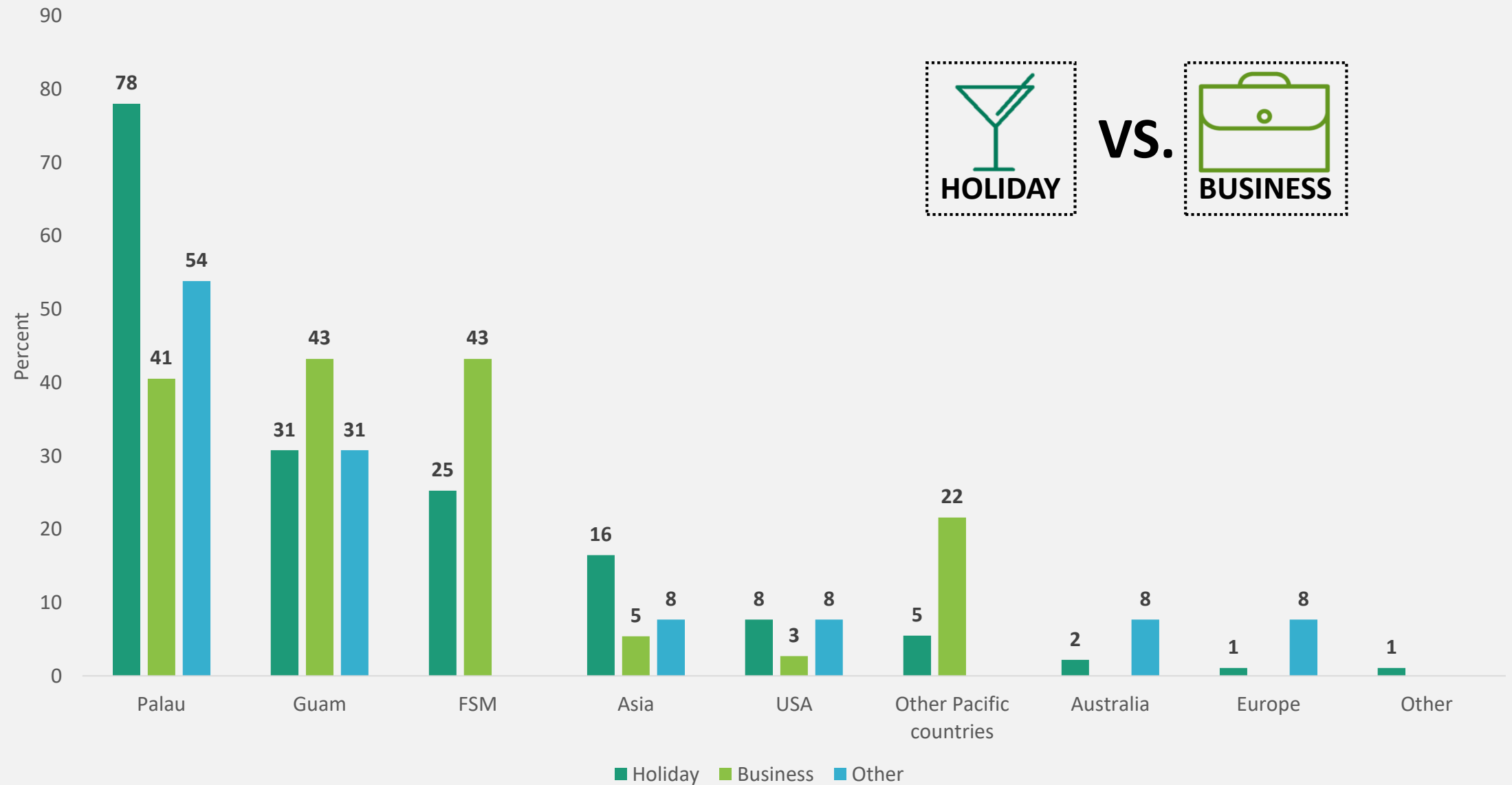
**43%** No, Yap is the only destination

**57%** Yes, Yap is part of a bigger journey



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

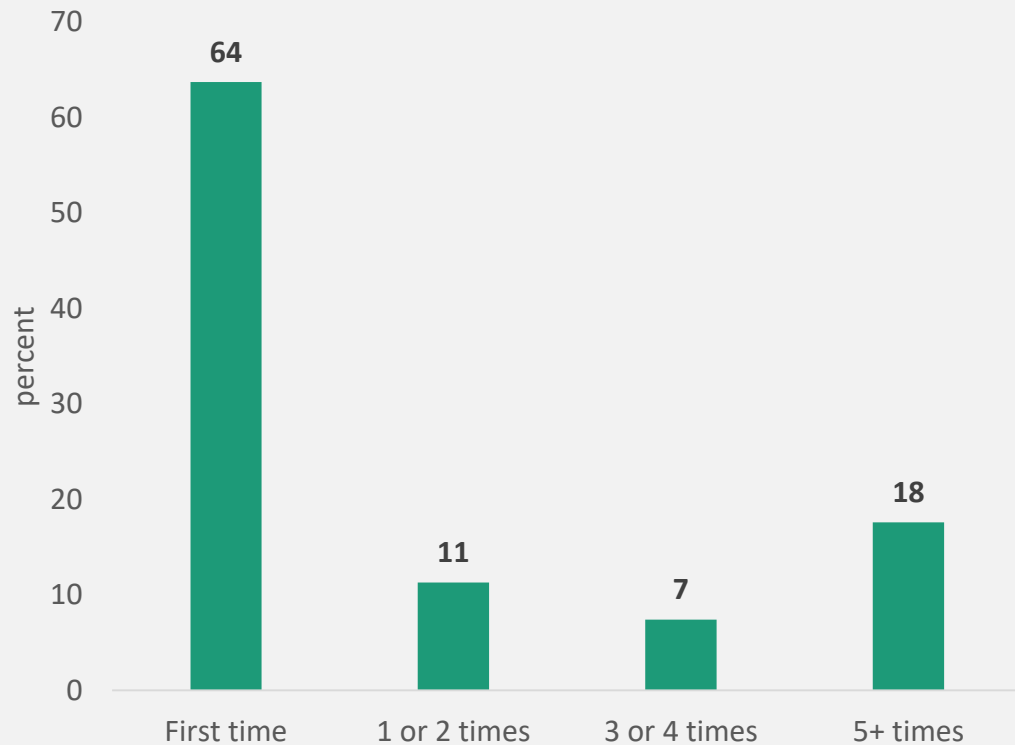
# Destinations included in the trip



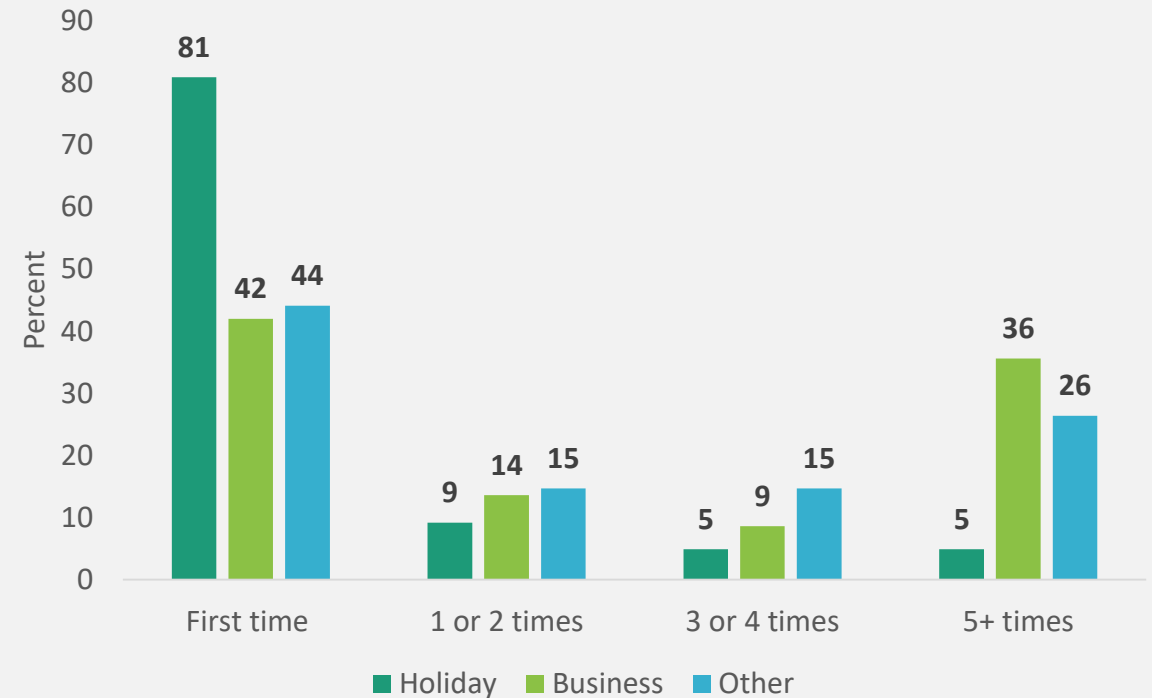
*Note: Multiple responses, therefore total does not add up to 100%*



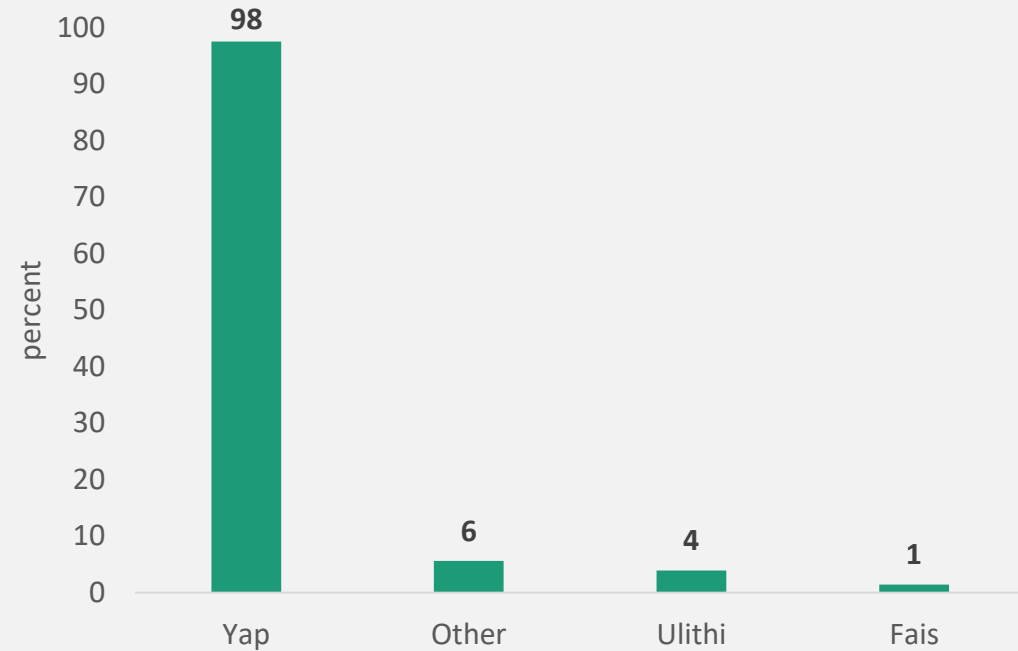
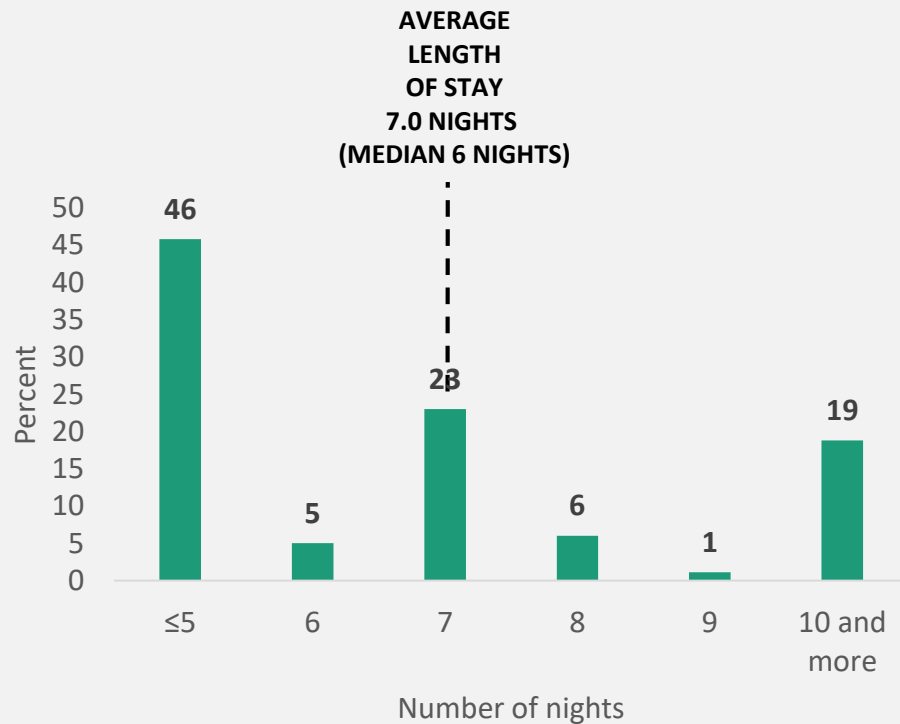
# Number of visits to Yap



VS.

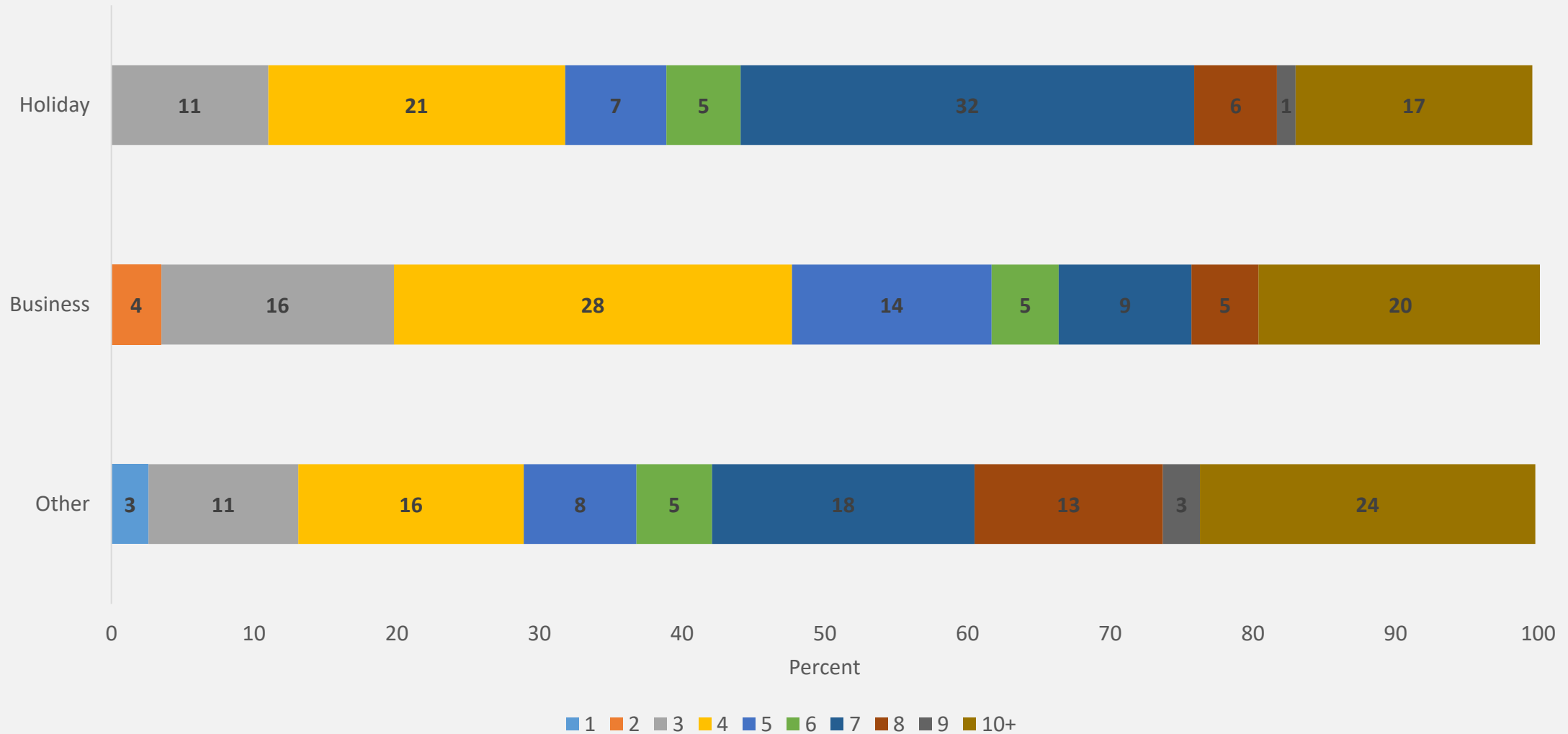


# Trip characteristics



*Note: Respondents could visit more than one island, so total does not add up to 100%.*

# Length of Stay (Nights)





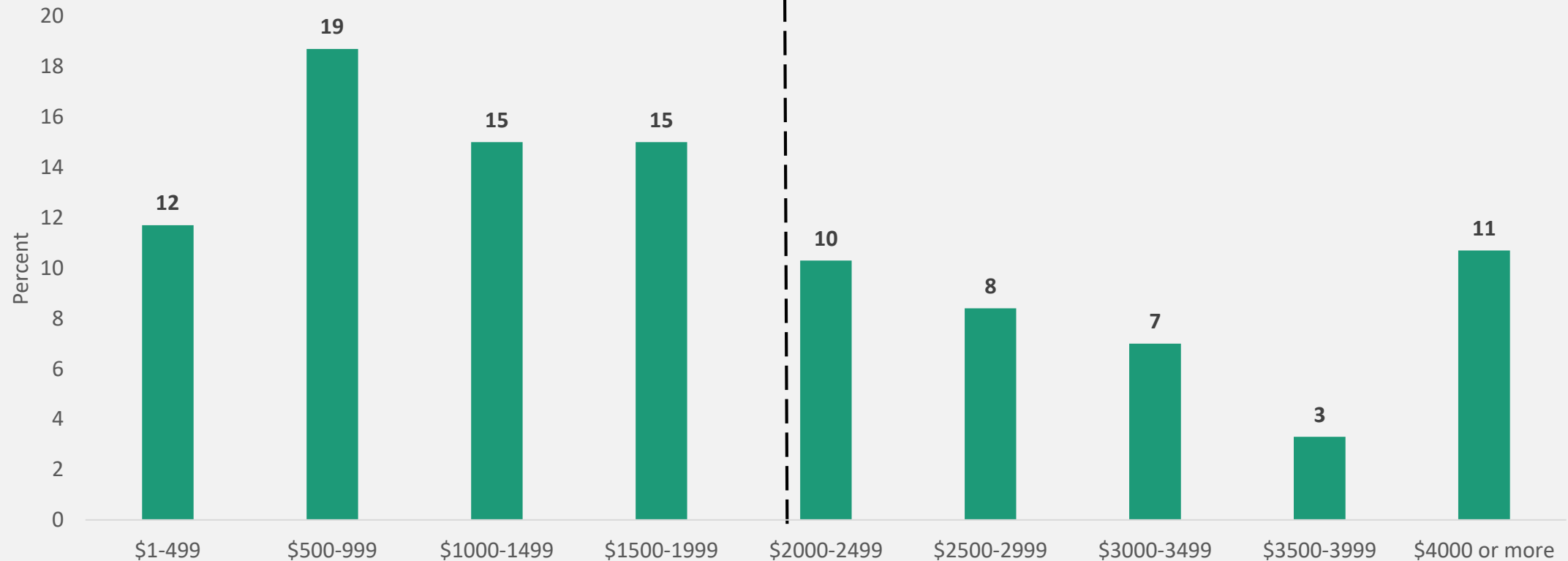
# Visitor expenditure

amount of money spent prior to arrival and while in Yap, and a breakdown of spending

# Prepaid expenditure

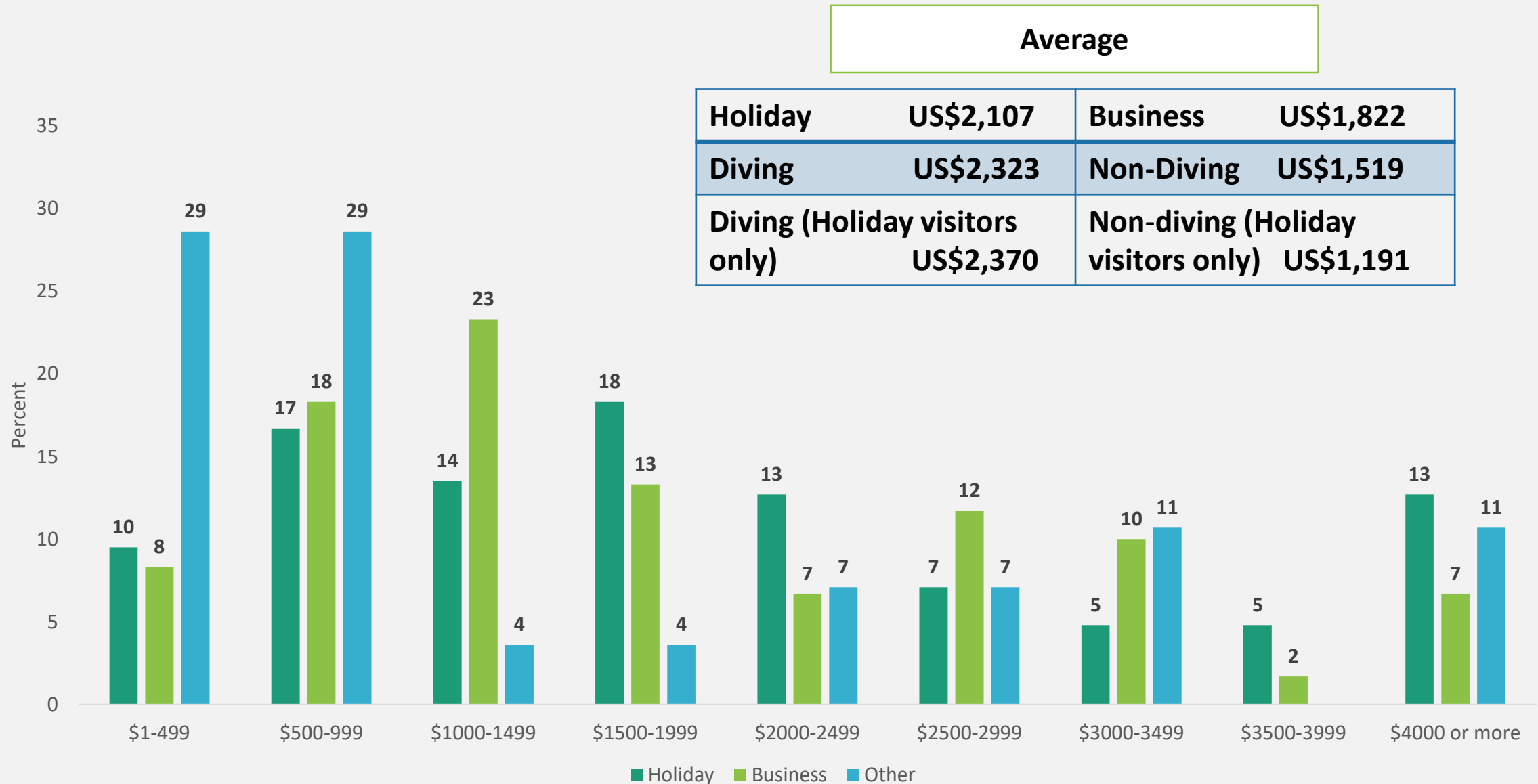
COVERING **373** ADULTS **31** CHILDREN

AVERAGE  
**\$1,952**  
PER PERSON





# Prepaid expenditure



# Local expenditure

COVERING 411 INDIVIDUALS

1  1  = US\$113

Expenditure Items	Mean (US\$)	(% of spend)
Accommodation	41	36
Restaurants, cafes & bars	25	22
Diving	16	15
Activities	7	6
Shopping	7	6
Domestic flights	6	6
Vehicle rental	5	5
Groceries	3	2
Other	2	1
Petrol	1	1
<b>Total expenditure per person per day</b>	<b>\$113</b>	<b>100%</b>

# Local expenditure – Purpose of Visit

	n=290 (covering 411)	n=155 (covering 233)	n=90 (covering 102)
<b>Expenditure Items</b>	Total Sample	Holiday	Business
Accommodation	41	41	58
Restaurants, cafes & bars	25	29	24
Diving	16	26	3
Activities	7	10	3
Shopping	7	6	9
Domestic flights	6	5	8
Vehicle rental	5	2	12
Groceries	3	2	5
Other	2	2	1
Petrol	1	0	1
<b>Total expenditure per person per day</b>	<b>\$113</b>	<b>\$123</b>	<b>\$124</b>

# Local expenditure – Divers vs. Non-Divers (holiday visitors only)

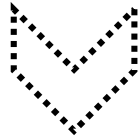
	n=290 (covering 411)	n=115 (covering 178)	n=32 (covering 52)
<b>Expenditure Items</b>	Total Sample	Diving visitors	Non-diving visitors
Accommodation	41	34	66
Restaurants, cafes & bars	25	28	34
Diving	16	32	0
Activities	7	8	22
Shopping	7	6	7
Domestic flights	6	4	7
Vehicle rental	5	1	8
Groceries	3	1	4
Other	2	2	2
Petrol	1	0	1
<b>Total expenditure per person per day</b>	<b>\$113</b>	<b>\$116</b>	<b>\$151</b>

# Contribution to the Yap economy – Diving (Holiday)

**AVERAGE SPEND  
BEFORE VISITING**

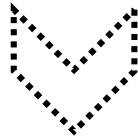
PER VISIT  
PER PERSON

**US\$2,370**



**40%**

OF THE PREPAID SPEND  
FLOWS INTO  
YAP ECONOMY



**AVERAGE SPEND  
WHILE IN YAP**

PER DAY  
PER PERSON

**US\$116**



**TOTAL  
CONTRIBUTION  
PER DAY  
PER PERSON**

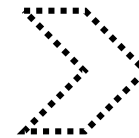
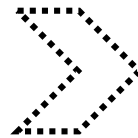
**US\$248**

**TOTAL  
CONTRIBUTION  
PER PERSON  
PER VISIT**

**US\$1,786**

PER DAY  
PER PERSON

**US\$132**



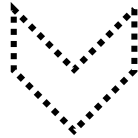


# Contribution to the Yap economy – Business Visitors

**AVERAGE SPEND  
BEFORE VISITING**

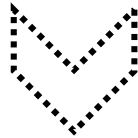
PER VISIT  
PER PERSON

**US\$1,822**



**40%**

OF THE PREPAID SPEND  
FLOWS INTO  
YAP ECONOMY



**AVERAGE SPEND  
WHILE IN YAP**

PER DAY  
PER PERSON

**US\$124**



**TOTAL  
CONTRIBUTION  
PER DAY  
PER PERSON**

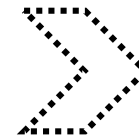
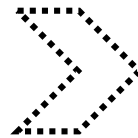
**US\$230**

**TOTAL  
CONTRIBUTION  
PER PERSON  
PER VISIT**

**US\$1,587**

PER DAY  
PER PERSON

**US\$106**



# Contribution to the Yap economy – All Visitors

**AVERAGE SPEND  
BEFORE VISITING**

PER VISIT  
PER PERSON

**US\$1,952**



**40%**

OF THE PREPAID SPEND  
FLOWS INTO  
YAP ECONOMY



**AVERAGE SPEND  
WHILE IN YAP**

PER DAY  
PER PERSON

**US\$113**



**TOTAL  
CONTRIBUTION  
PER DAY  
PER PERSON**

**US\$225**



**TOTAL  
CONTRIBUTION  
PER PERSON  
PER VISIT**

**US\$1,572**

PER DAY  
PER PERSON

**US\$112**

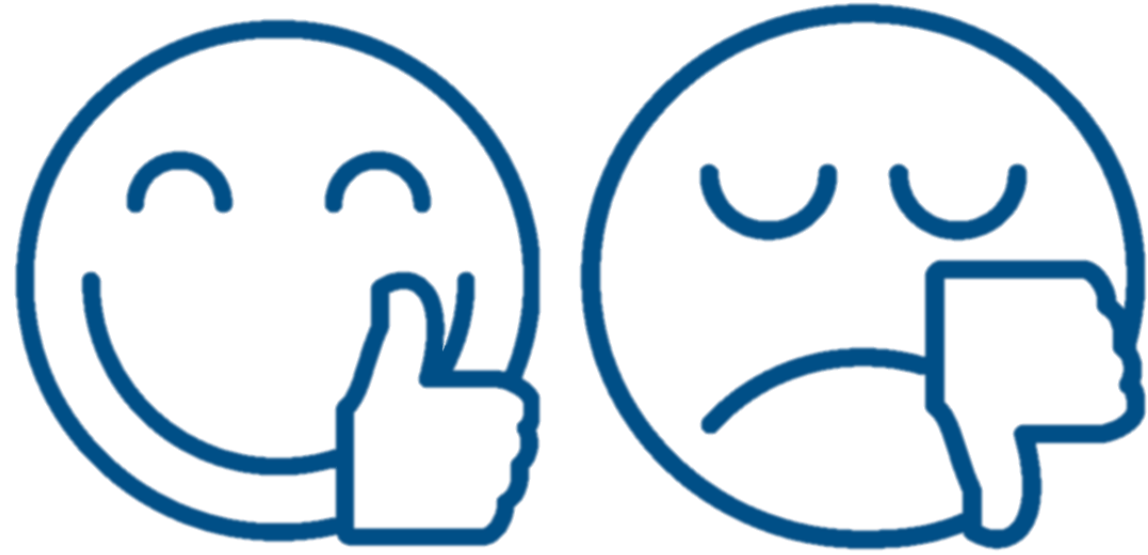
# Contribution to the Yap Economy

**1000 visitors**



**US\$1.57m**

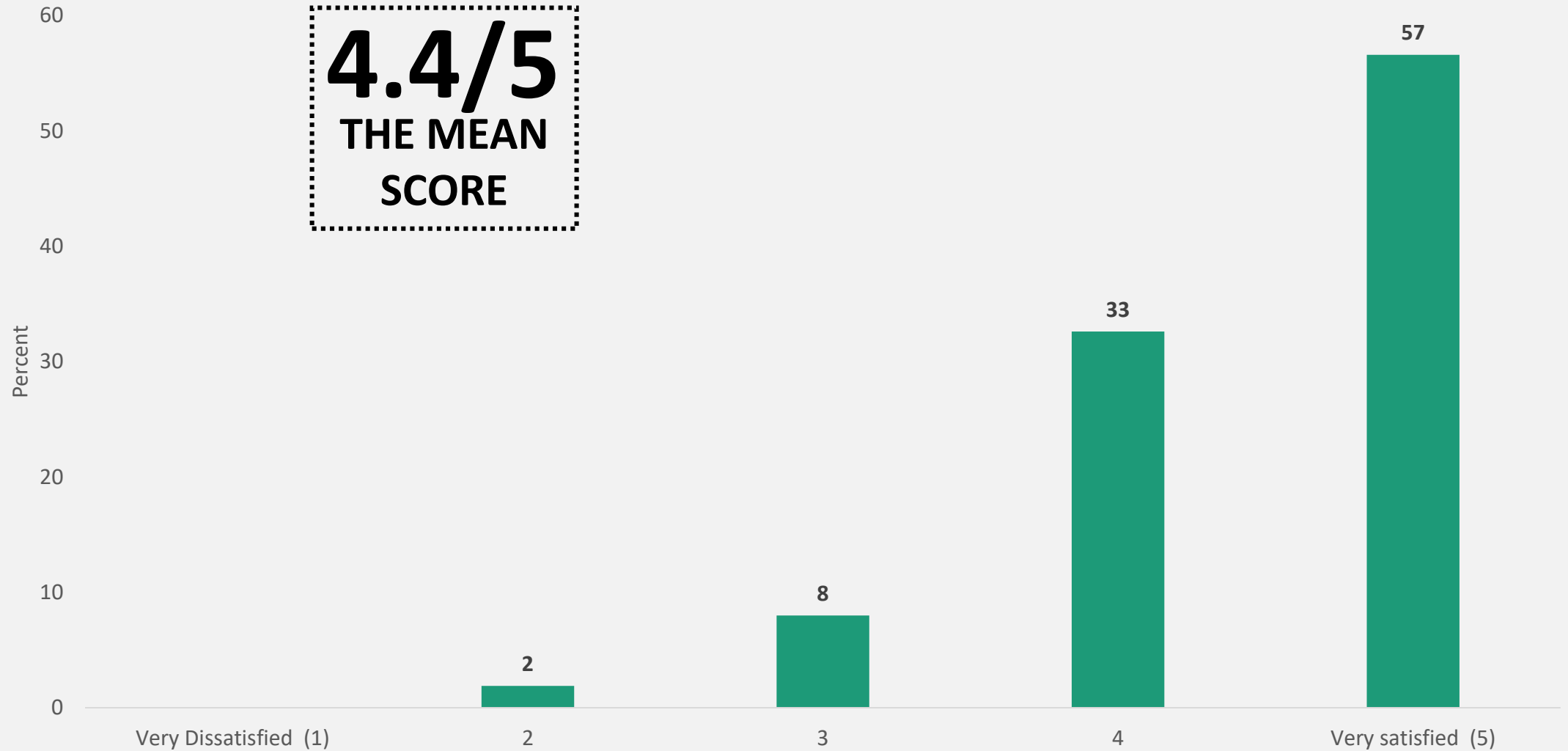




# Visitor satisfaction

most and least appealing elements of the visit, overall satisfaction

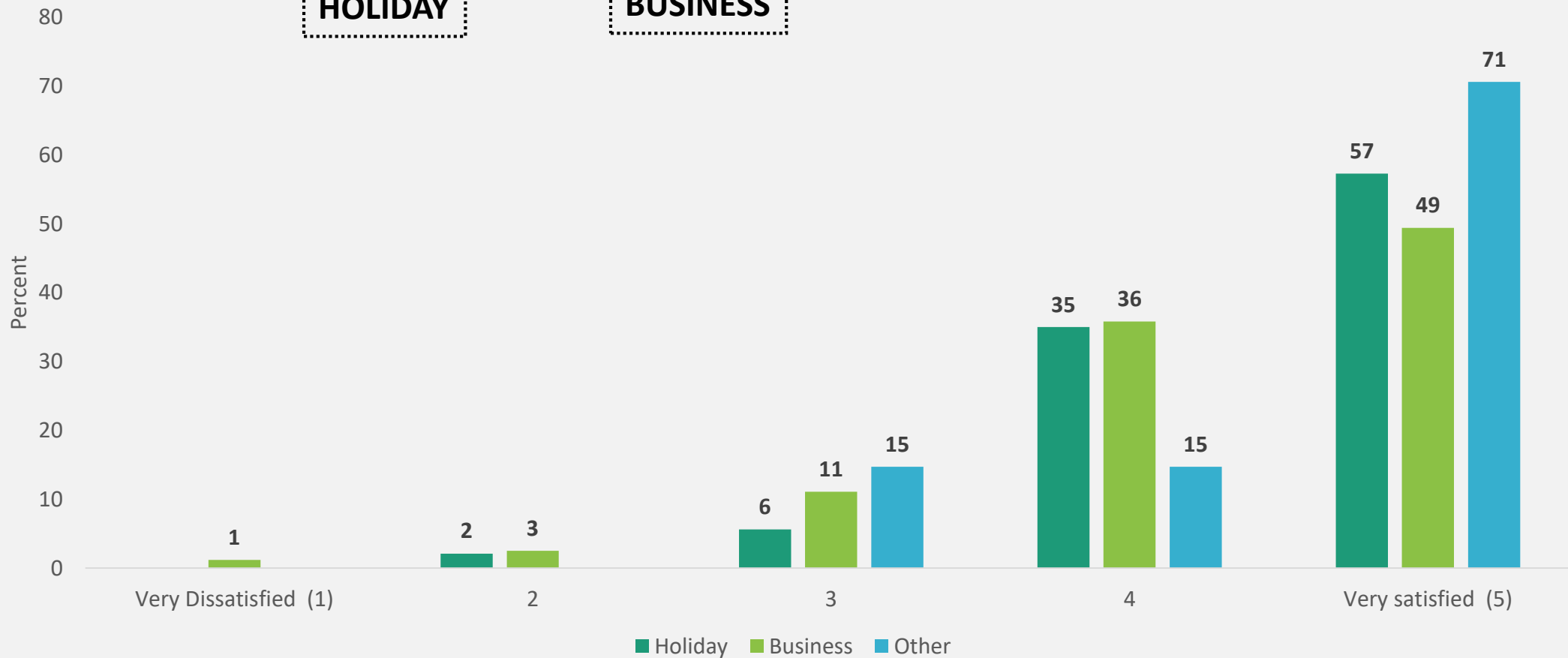
# Overall satisfaction with the experience of Yap



# Overall satisfaction with the experience of Yap



**VS.**

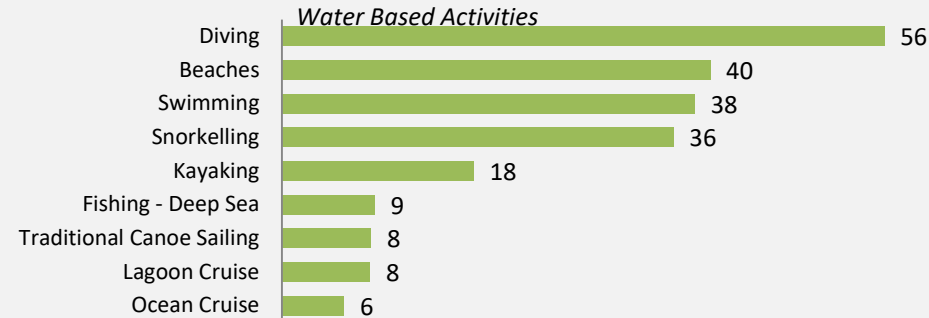


# Overall Satisfaction (Satisfied/Very Satisfied)

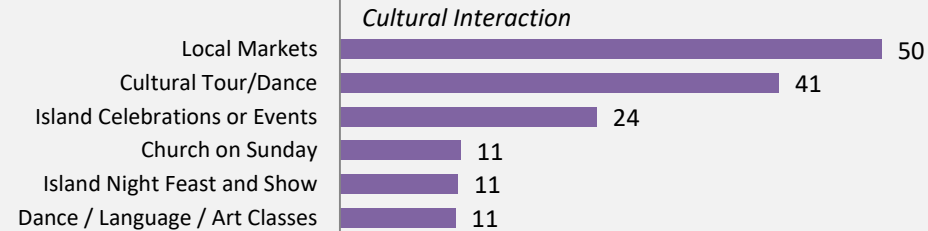
Country/State	Satisfied	V. Satisfied	Total
Cook Islands	23	70	93
Niue	27	66	93
Yap	33	57	90
Samoa	32	54	86
Vanuatu			83
PNG			73
Solomon Is	39	28	67

# Degree of participation (%) in activities

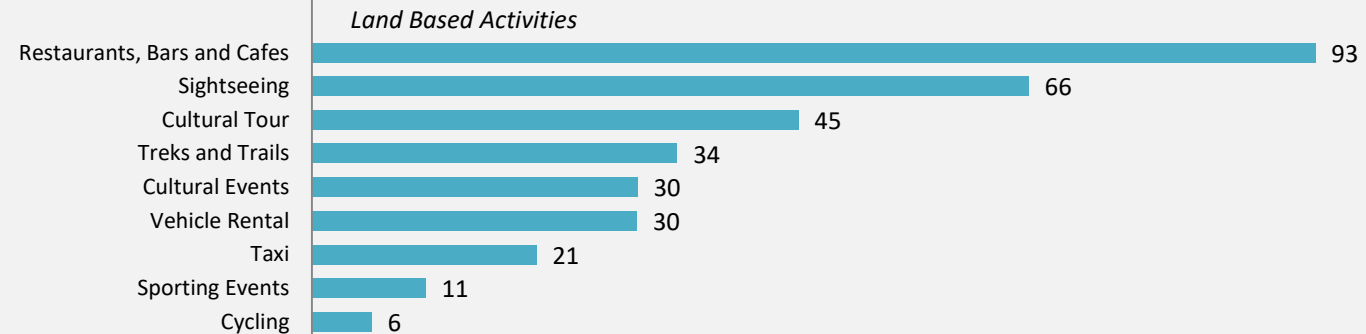
## WATER-BASED ACTIVITIES



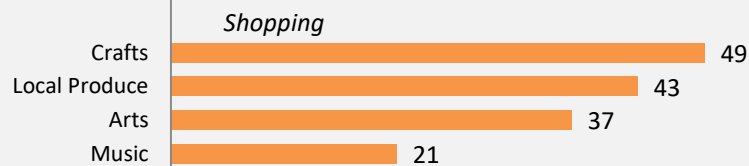
## CULTURAL INTERACTION



## LAND-BASED ACTIVITIES



## SHOPPING



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

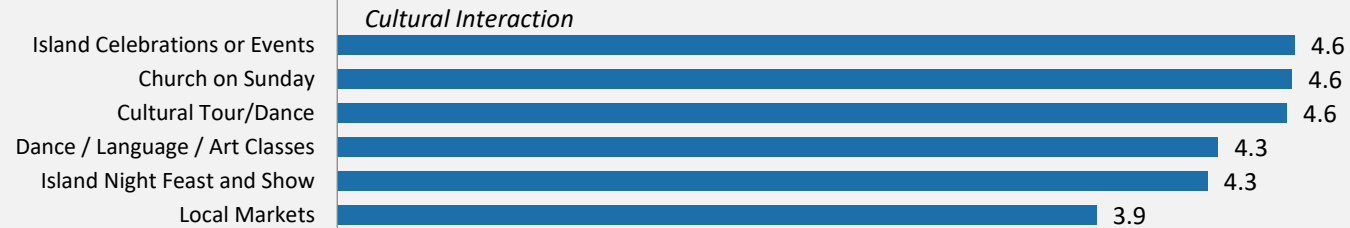


# Degree of satisfaction in activities

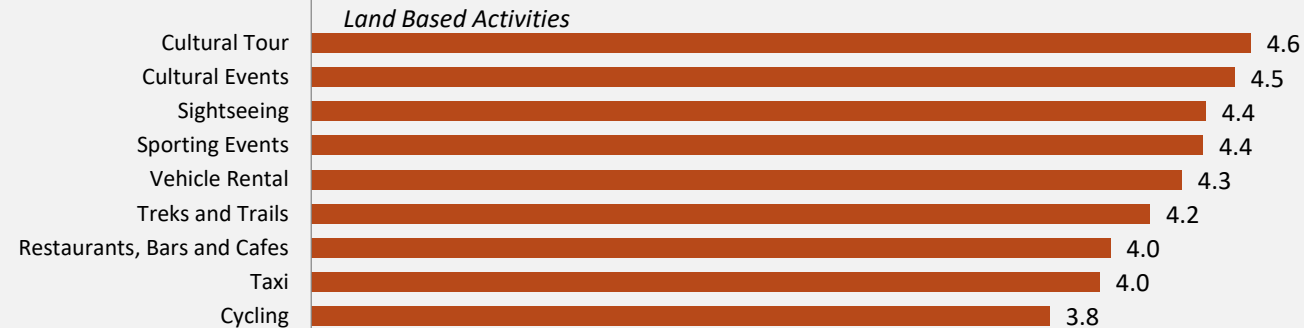
## WATER-BASED ACTIVITIES Average 4.3



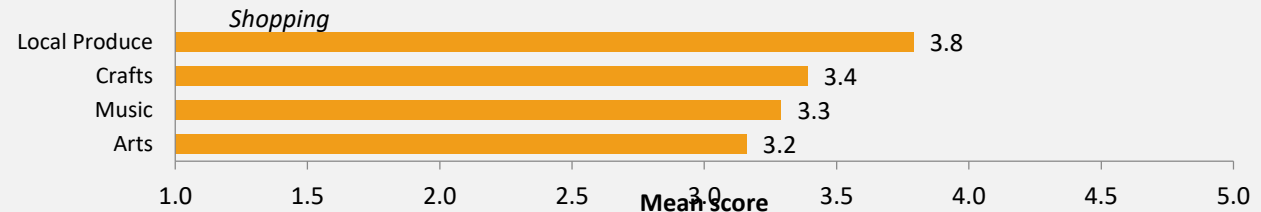
## CULTURAL INTERACTION Average 4.4



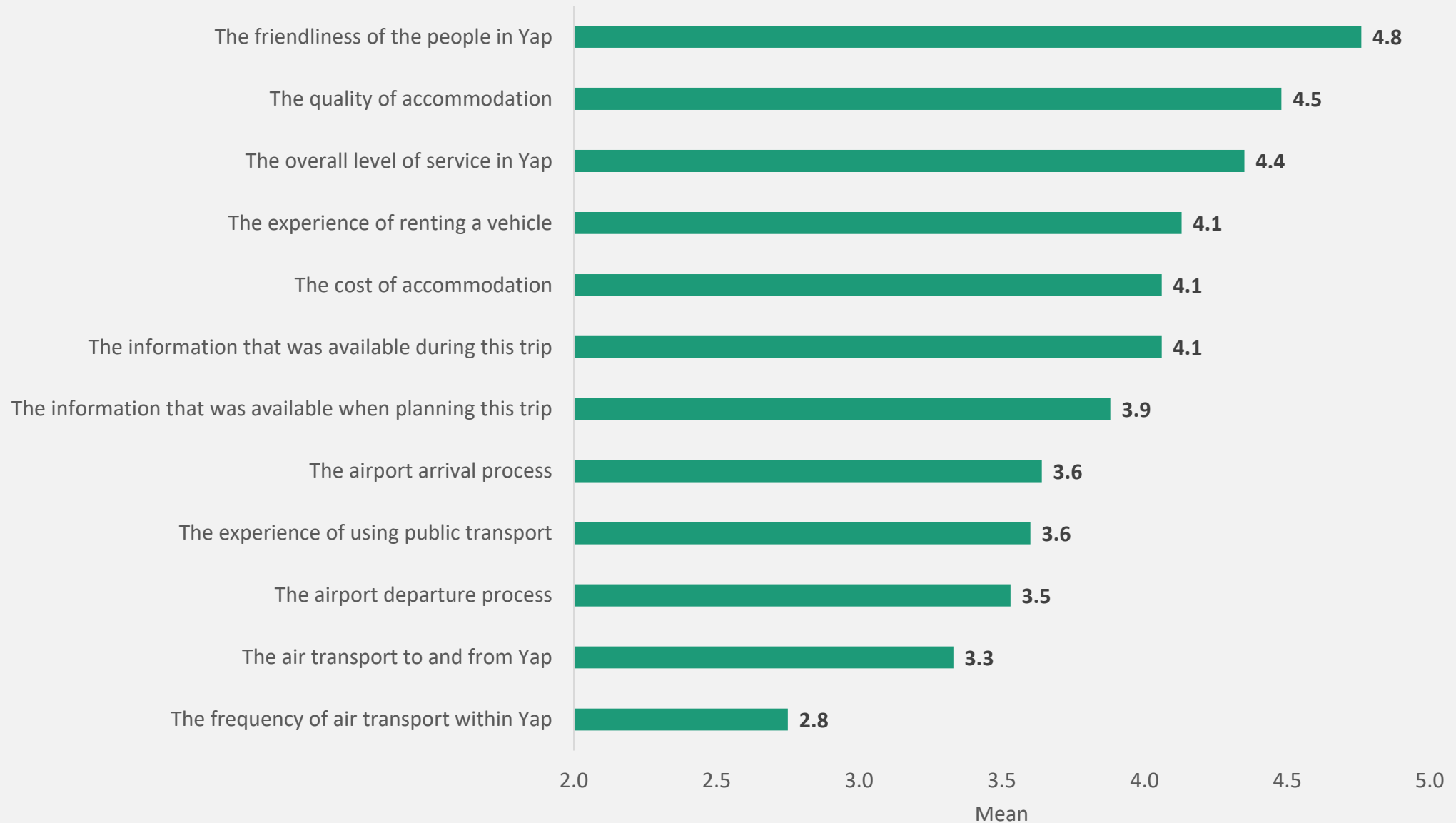
## LAND-BASED ACTIVITIES Average 4.2



## SHOPPING Average 3.4



# Degree of satisfaction (key statements)



# The most appealing aspects of Yap

Themes	Percent
Local people	51
Activities and attractions	40
Environment and cleanliness	21
Local culture	20
Accommodation	9
Level of service	7
Atmosphere	6
Food and Beverage	4
Un-commercial	2
Local history	1
Convenience	1
Infrastructure	1

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

# The most appealing aspects of Yap

Themes	Holiday (%)	Business (%)	Other (%)
Activities and attractions	57	12	31
Local people	48	53	56
Environment and cleanliness	19	25	22
Local culture	14	21	38
Accommodation	12	4	9
Level of service	8	8	0
Atmosphere	6	4	6
Food and Beverage	4	3	3
Un-commercial	4	0	0
Local history	1	3	0
Convenience	0	3	0
Infrastructure	0	1	3
Other	0	1	0

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

# The most appealing aspects of Yap



*"The generosity of the **local people**, there was nothing they wouldn't do for you. And **the beach at village view** was amazing."*

*"**The diving** was world-class, and we loved our (smaller) dive shop experience with Beyond the Reef. In general, though, **everyone was incredibly friendly** and went out of their way to see that we felt welcome."*

*"Free **airport wifi**. You can teach Palau something."*

*"The potential for a clean environmentally friendly and extremely **unique eco tourism destination** is huge."*

*"**Island Time**: It's hard not to relax on Yap. **The culture** is set up to be laid back and there is little conscious nous of time. Definitely a plus over the hectic pace of day-to-day life."*

*"What is most appealing about Yap to us is that it retains its **traditional character**; Yapese live their lives and treat tourists very nicely, but they do not change their ways to "make a show" for tourists."*

*"**The sense of respect, humbleness and traditional culture** that are **still in practice** is amazingly appealing to us."*

# Most Appealing Aspects of Visit

Country/State	'Local People' Ranking
PNG	1
Vanuatu	1
Solomon Is	1
Yap	1
Cook Islands	2
Samoa	2
Niue	3

# The least appealing aspects of Yap

Themes	Percent
Public services and facilities	25
Flight related issues	23
Attractions and activities	13
Price of goods and services	9
Local people and level of service	9
Food and beverage	7
Consumption of betel nut	5
Undeveloped local products, crafts and souvenirs	4
Rental cars or scooters, transport	4
Accommodation	3
Rubbish and natural environment care	3
Weather	2
Human right issues	1
Other	1
Stray animals and mosquitos	1

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

# The least appealing aspects of Yap

Themes	Holiday (%)	Business (%)	Other (%)
Public services and facilities	28	21	21
Flight related issues	23	27	10
Attractions and activities	14	13	10
Price of goods and services	12	3	14
Local people and level of service	9	7	14
Food and beverage	8	6	7
Accommodation	6	0	0
Consumption of betel nut	3	9	3
Rental cars or scooters, transport	3	3	7
Rubbish and natural environment care	3	0	10
Undeveloped local products, crafts and souvenirs	3	4	7
Weather	2	3	0
Human right issues	1	1	3
Other	1	1	0
Stray animals and mosquitos	0	3	0

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



# The least appealing aspects of Yap



*"We stayed from Sunday to Wed due to the **limited number of flights to/from Yap**. There were **very few activities** during this time. It would be helpful to coordinate tourism activities to coordinate with flights."*

*"The Saturday afternoon **cultural program** at the village was cancelled because there were **not enough sign ups**. I suggest that you do something to widely advertise at the airport (give a slip of paper while giving the Leis) and other places and hold the program consistently."*

*"**Lack of available cultural dance** opportunity was disappointing."*

*"It is SO **difficult to get to Yap from the US** mainland, it makes it a once-a-decade sort of adventure (it took us 5 hops from St. Louis)."*

*"Yap has a completely **undeveloped service industry** and pays no attention to providing services that meet expectations or are appropriately priced."*

*"A few more shops selling **handicrafts** and **different restaurants** would make the stay more interesting."*

*"Just wish that Yap have more of their **local delicacy and local produced** available in restaurants."*

# Least Appealing (Environment)

Country	% Responses
Yap	3
Niue	4
Cook Is.	8
Samoa	11
Vanuatu	15
PNG	18
Solomon Is	35

# Suggestions to improve the visit



## WHAT TO IMPROVE?

More flights, better schedule	32%
Public services and infrastructure	26%
Attractions and activities	18%
Local people, standards of service	11%
Food and beverage	9%
Better information	8%
More souvenirs and crafts	6%

# Suggestions to improve the visit



*“Customer service training for restaurant employees” “Have more variety of restaurants, marine sports beside diving, fruit stand by roads, more eye catch tour like island tour or village tour, night market for visitors.”*

*“Better access to outer islands, a hop on/off airpass like the one Continental used to offer, better signage for hiking. “*

*“Flights that depart at a reasonable time. Not everyone leaving Yap connects on the UA flight to Honolulu from Guam, so it would be nice if UA provided a better option.”*

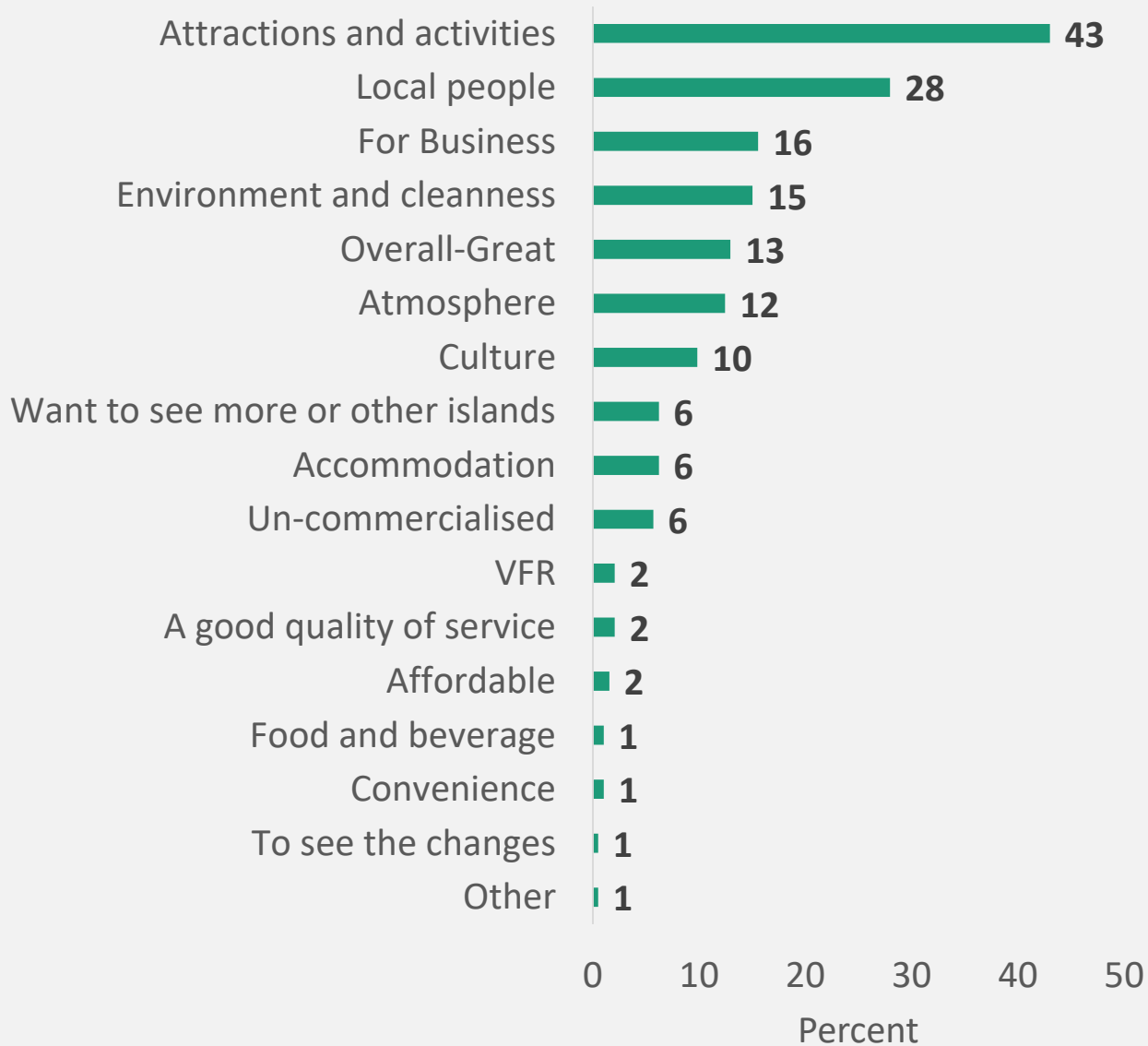
*“A detailed map of the island would be terrific as a reference. I had the one I got at the hotel, but it wasn't particularly detailed.”*

*“I would have liked to try homestay in a village, but I was told by the tourist office that they don't promote that anymore.”*

*“The only other thing, which not everyone would see as an issue is the internet speed. Yes, many of us all too reliant on being connected to the outside world. Some of us do conduct business while on trips such as this, and emails/networking is crucial.”*

*“Create the place to see local dance anytime (everyday), Sell souvenirs like stone money or shell money shaped cookie chocolate at souvenir shop or airport.”*

# Reasons for returning to Yap



**87%**  
**visitors**  
would like to return

**57%**  
**Return visitors**  
would like to visit outer islands

*"Would love to see more of the island and learn more about the culture."*

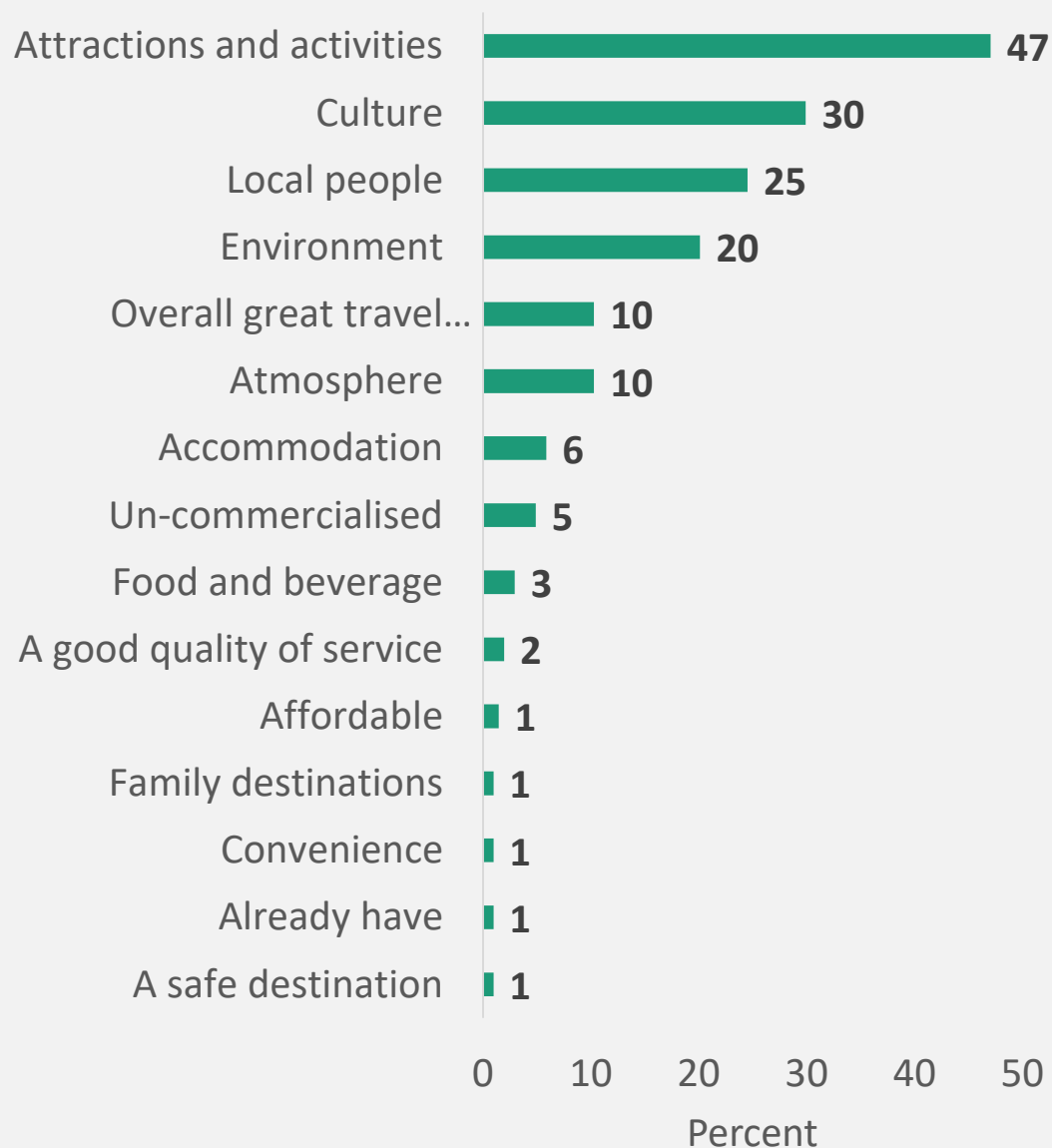
*"People were very friendly. Yap day was highlight of trip. We felt very lucky to be there with the traditional dancing and dress."*

*"Wonderful people, incredible diving, lack of tourists, "natural" and unspoiled feeling. Hasn't succumbed to modern ways."*

*"For the Mantas - love them."*

*Yap is one of the best dive destinations of the world, with corals and marine wildlife still abundant, and service there is amazing*

# Reasons to recommend Yap to others



**96%**  
visitors  
would recommend

*"Everyone should go there once to experience the **mantas** and the **stone money**."*

*"Adventure travellers - **good cultural sites** combined with **diving/snorkelling activities**."*

*"to experience other **living lifestyles** and to get to know the **friendly people**."*

*"To those seeking to get away from the fast life. **Just to relax**."*

*"Yap is one of the **most beautiful place in Micronesia** and because they still practice their traditional way of living, it make it unique."*

*"**Tranquil and safe, outer islands** must be traditional."*

# Additional comments on the trip

**OVERALL VERY  
POSITIVE EXPERIENCE**  
36%

*"Yap (FSM) was my 109th country visited and definitely represents one of top 10 among them!"*

**TOURISM PRODUCT  
DEVELOPMENT**  
22%

*"It would be great to have the Manta Ray Sanctuary become a reality with diver fees being charged and money used for overall marine conservation enforcement and education about Yapese natural heritage towards Yapese children and youth."*

**APPRECIATION OF THE  
LOCAL PEOPLE AND  
CULTURE**  
22%

*"You have the village museum in Colonia. How about having traditional ceremonies performed there once a week for the tourists. You can even charge admission that can go to the Tribes that perform."*

**INVESTMENT AND  
INFRASTRUCTURE**  
10%

*"Need hiking/walking areas that are unrestricted, with good signage, that are maintained, with maps and information."*

**BETTER ACCESIBILITY  
OF THE DESTINATION**  
9%

*"Take good care of your underwater world especially the mantas! It is great to see how healthy and clean it is above and under the water."*

*"Really appreciated the locals making us feel welcome and their excellent English. Beautiful island and people.."*

**TOURISM  
DEVELOPMENT**  
9%

*"Development is good. but development under the control of the local people not outside investors who are looking after their own interests."*

*Yap has all it needs to develop a world class eco-tourism destination. I hope that all the challenges will someday soon be met with strong conviction by the locals so that tourist can truly enjoy this unique gem in the pacific and at the same time, improve the local economy.*





# Thank you

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**Web: <http://www.nztri.org/>**

**Key contributions: Sam Li, Mindy Sun**

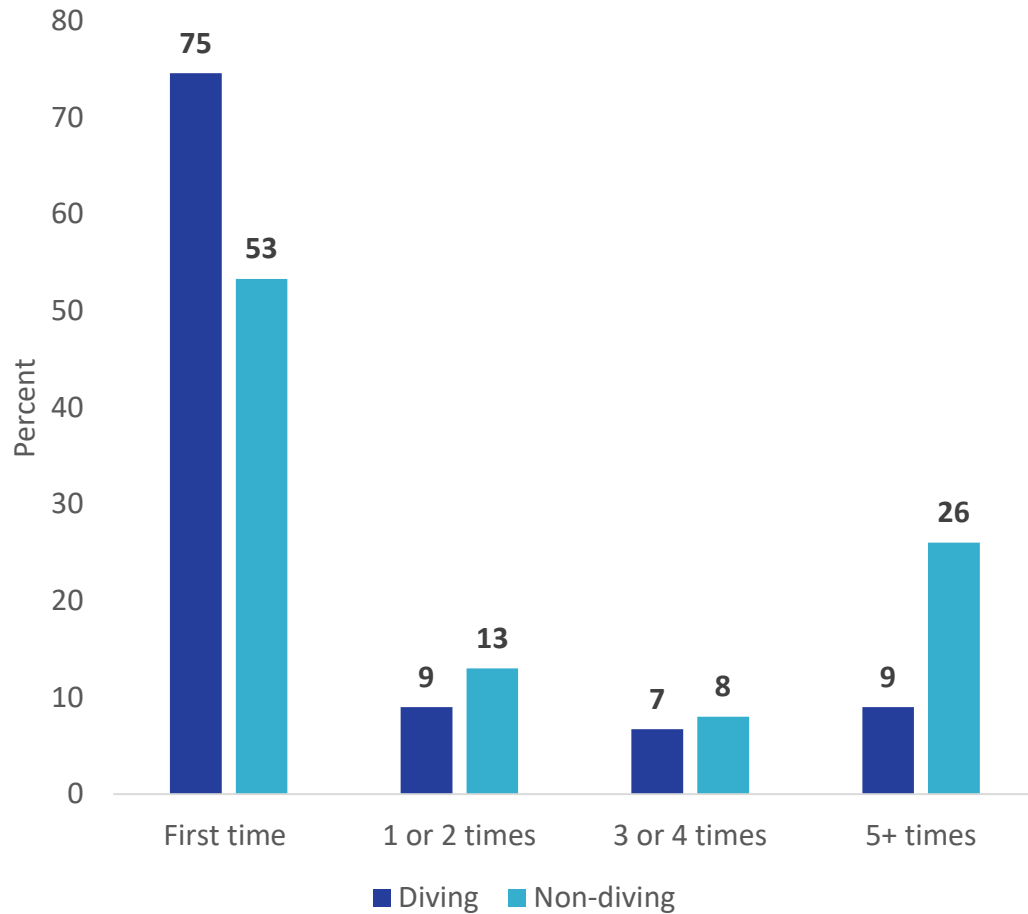


# Appendix – Additional Slides

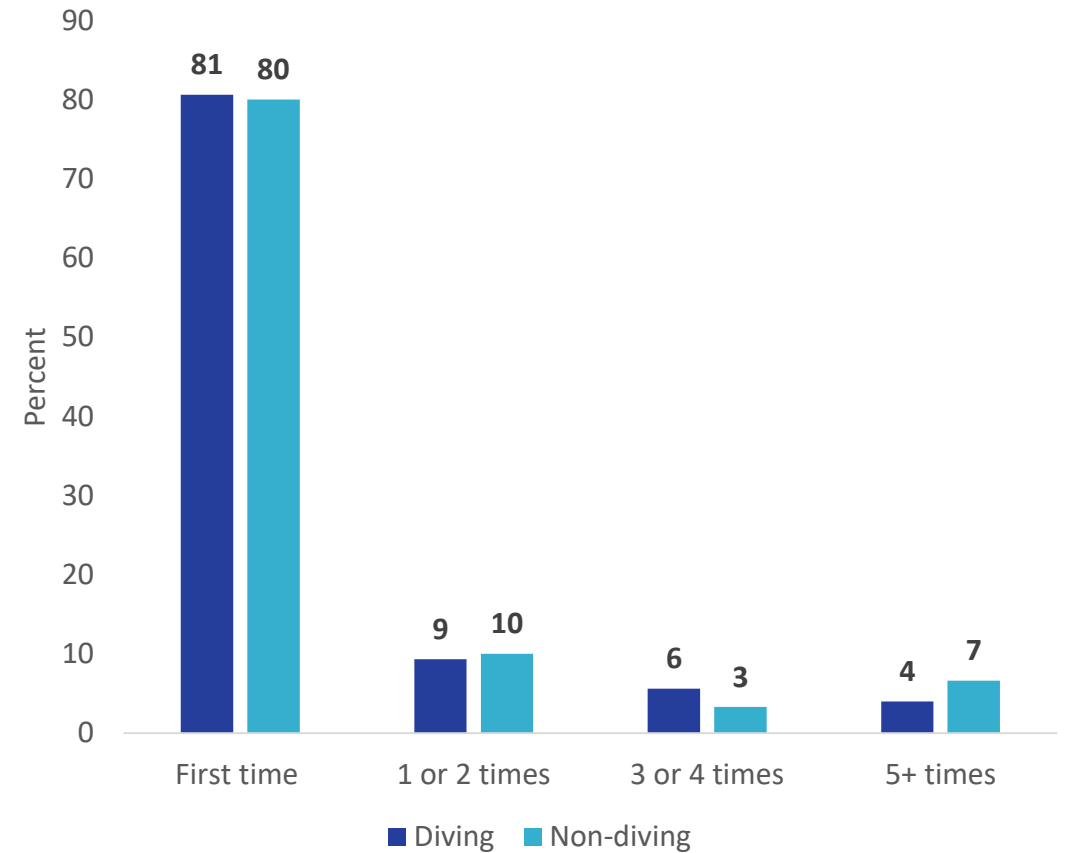
# Number of visits to Yap



VS.



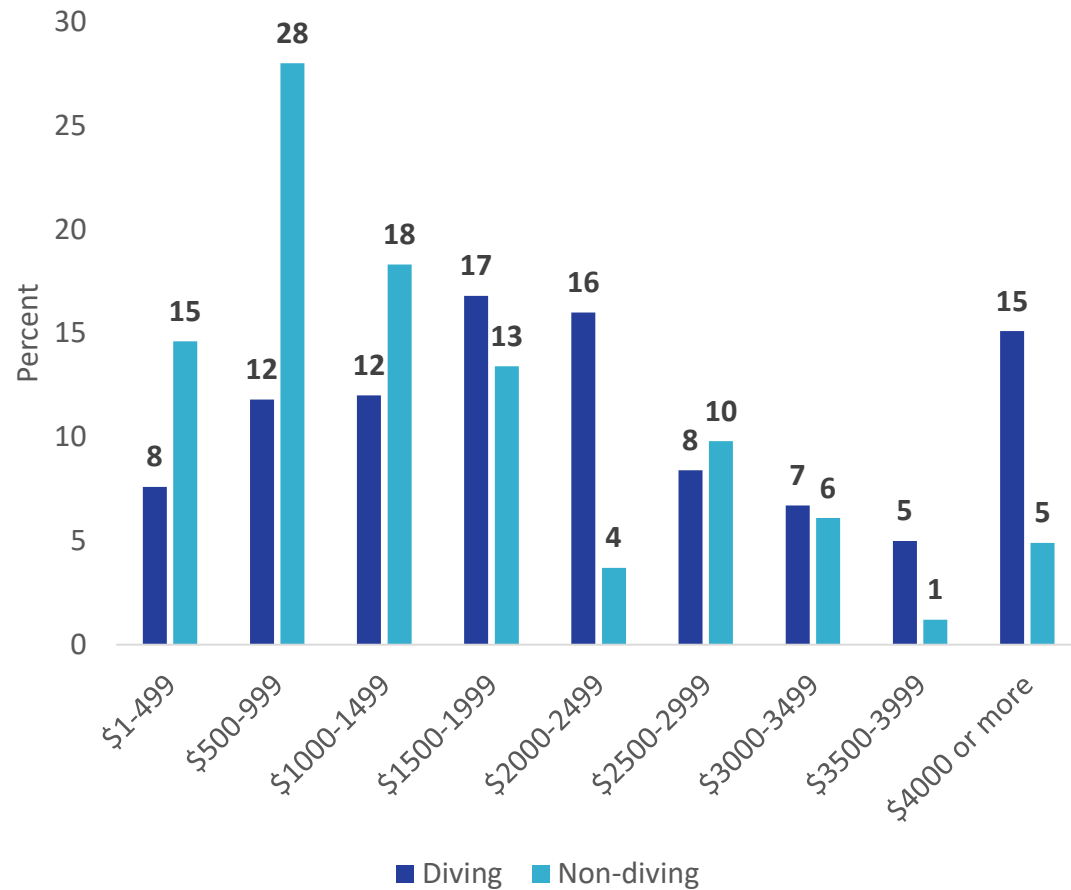
## Holiday Visitors



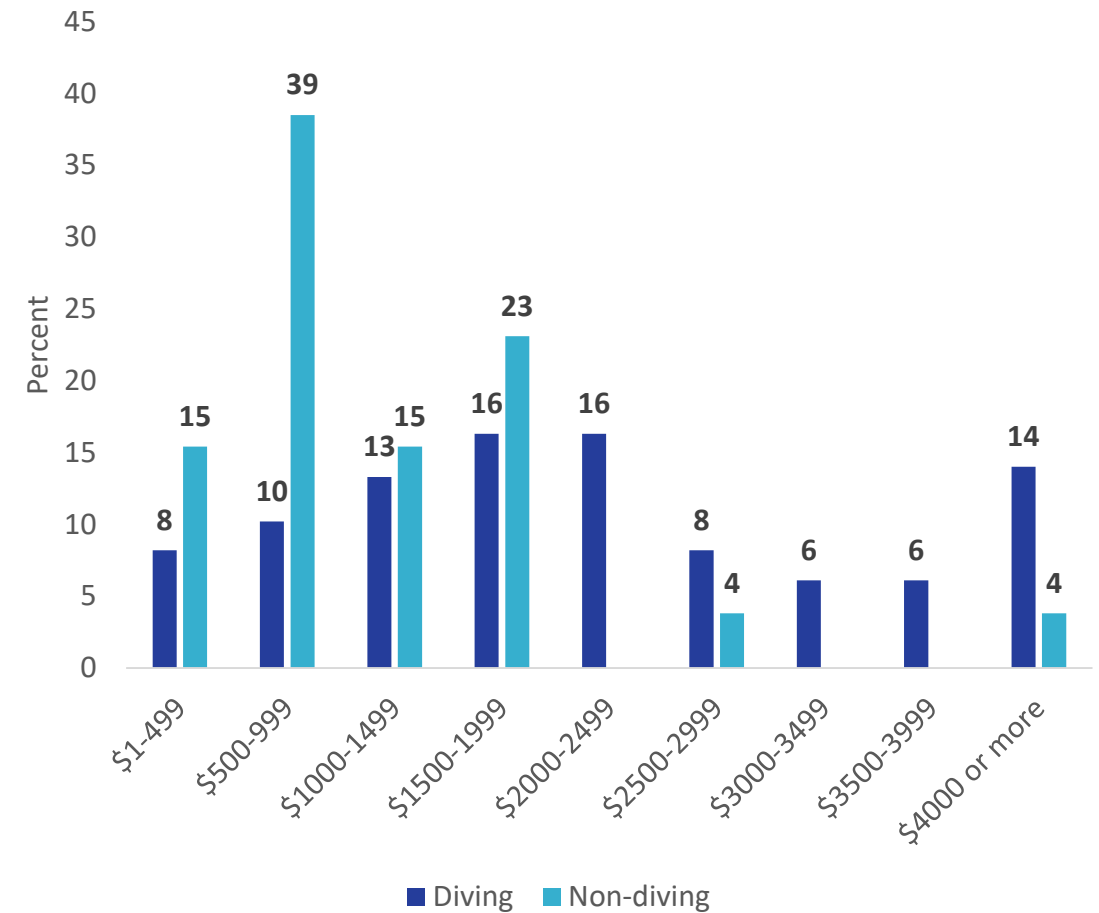
# Prepaid expenditure



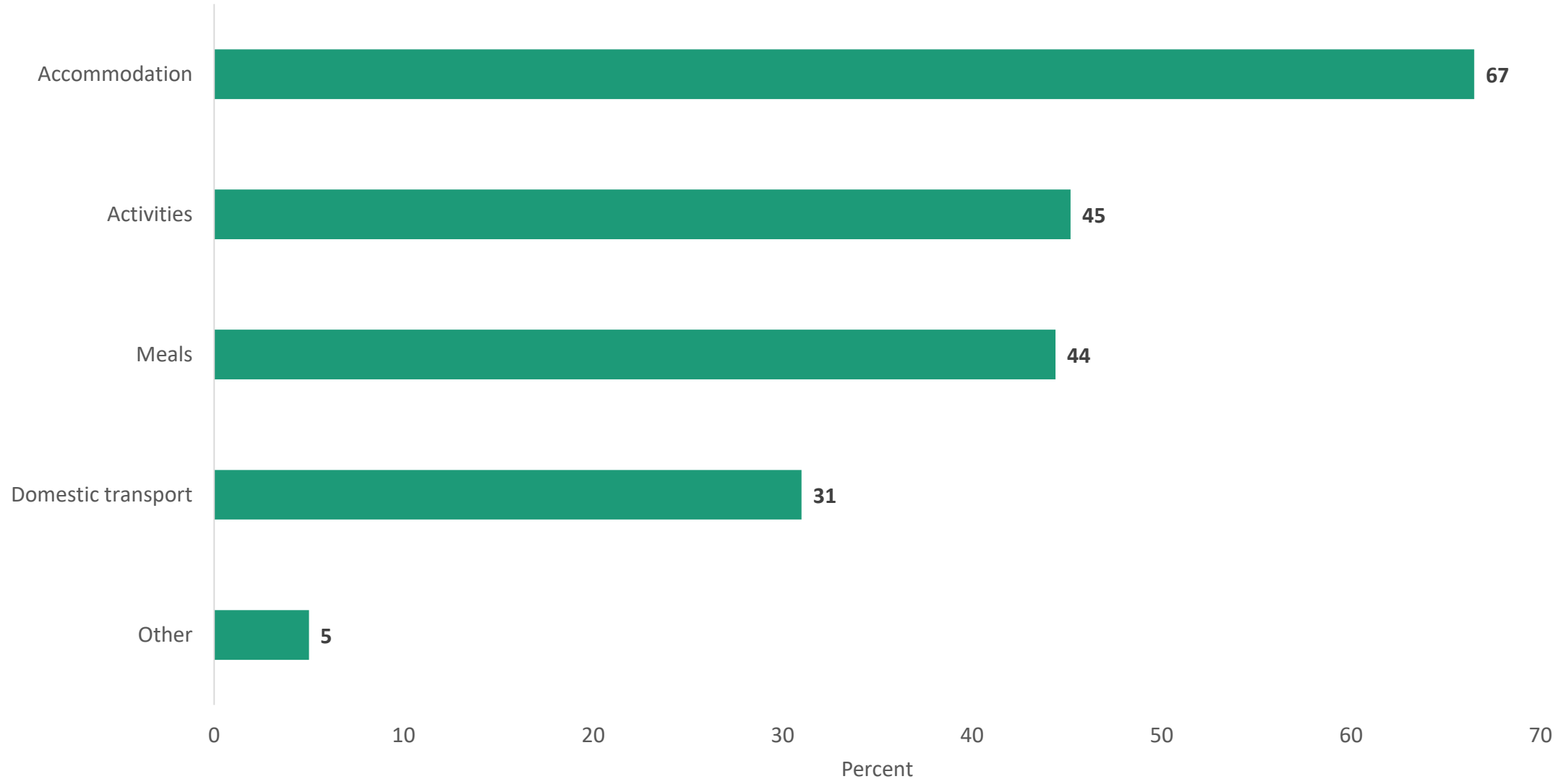
VS.



## Holiday Visitors Only

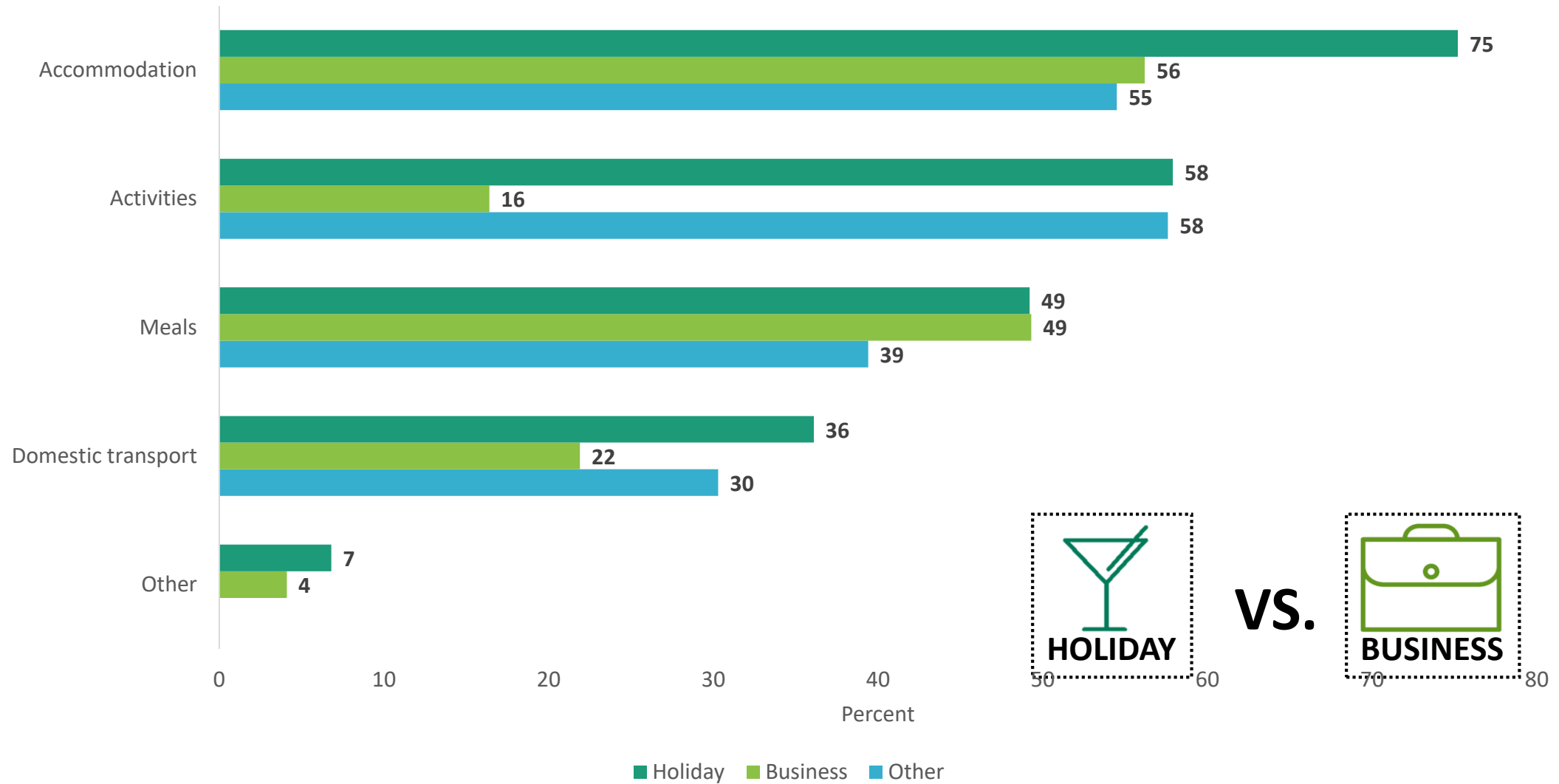


# Items included in prepaid expenditure



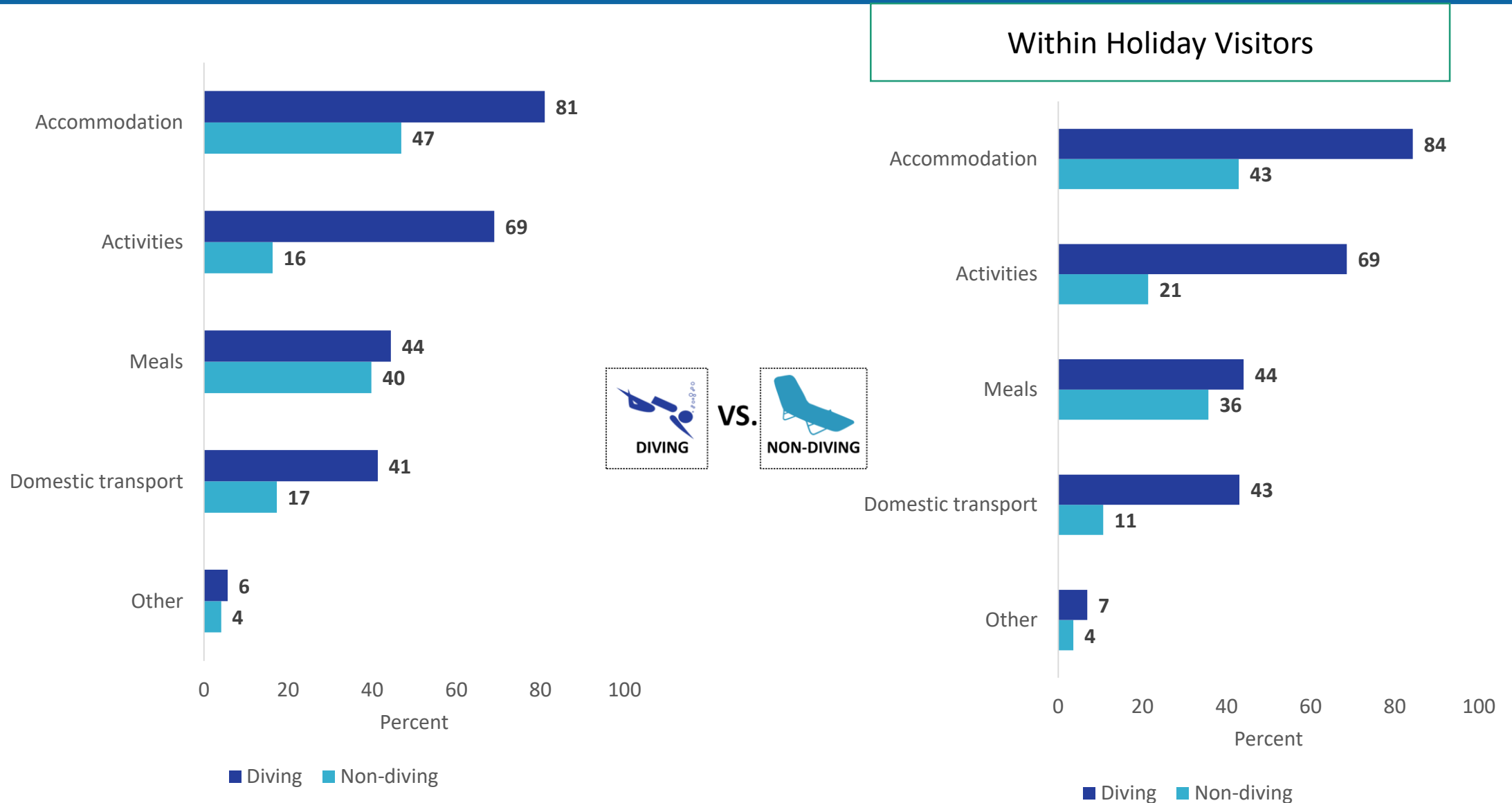
*Note: Multiple responses, therefore total does not add up to 100%*

# Items included in prepaid expenditure



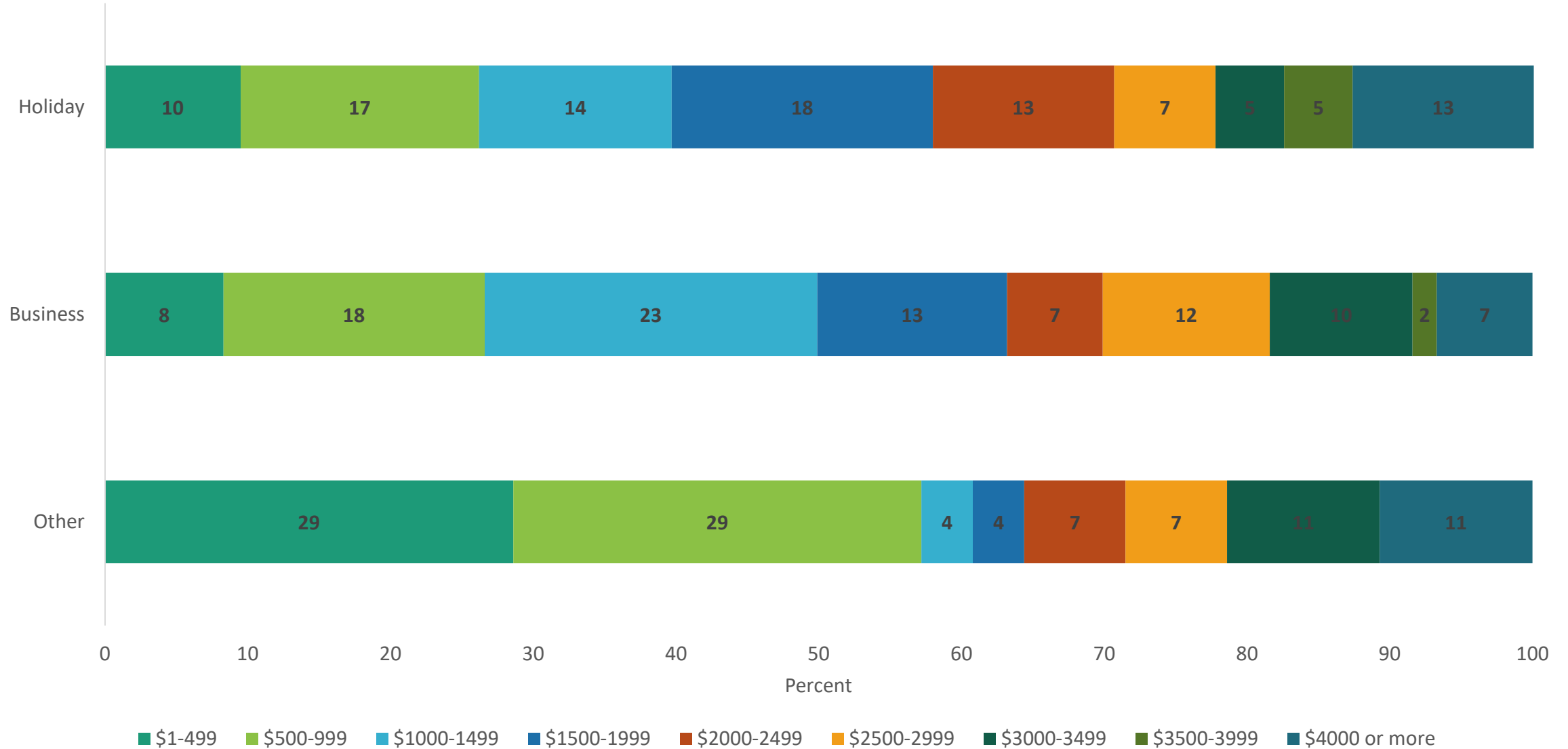
Note: Multiple responses, therefore total does not add up to 100%

# Items included in prepaid expenditure



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

# Prepaid expenditure



# Local expenditure – Divers vs. Non-Divers

	n=290 (covering 411)	n=144 (covering 206)	n=115 (covering 66)
<b>Expenditure Items</b>	Total Sample	Diving visitors	Non-diving visitors
Accommodation	41	36	55
Restaurants, cafes & bars	25	27	24
Diving	16	29	0
Activities	7	7	8
Shopping	7	6	5
Domestic flights	6	3	12
Vehicle rental	5	2	11
Groceries	3	2	4
Other	2	2	2
Petrol	1	0	1
<b>Total expenditure per person per day</b>	<b>\$113</b>	<b>\$114</b>	<b>\$122</b>

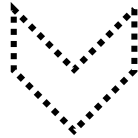


# Contribution to the Yap economy – Non-diving (Holiday)

**AVERAGE SPEND  
BEFORE VISITING**

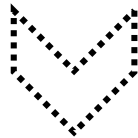
PER VISIT  
PER PERSON

**US\$1,191**



**40%**

OF THE PREPAID SPEND  
FLOWS INTO  
YAP ECONOMY



**AVERAGE SPEND  
WHILE IN YAP**

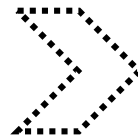
PER DAY  
PER PERSON

**US\$152**



**TOTAL  
CONTRIBUTION  
PER DAY  
PER PERSON**

**US\$234**



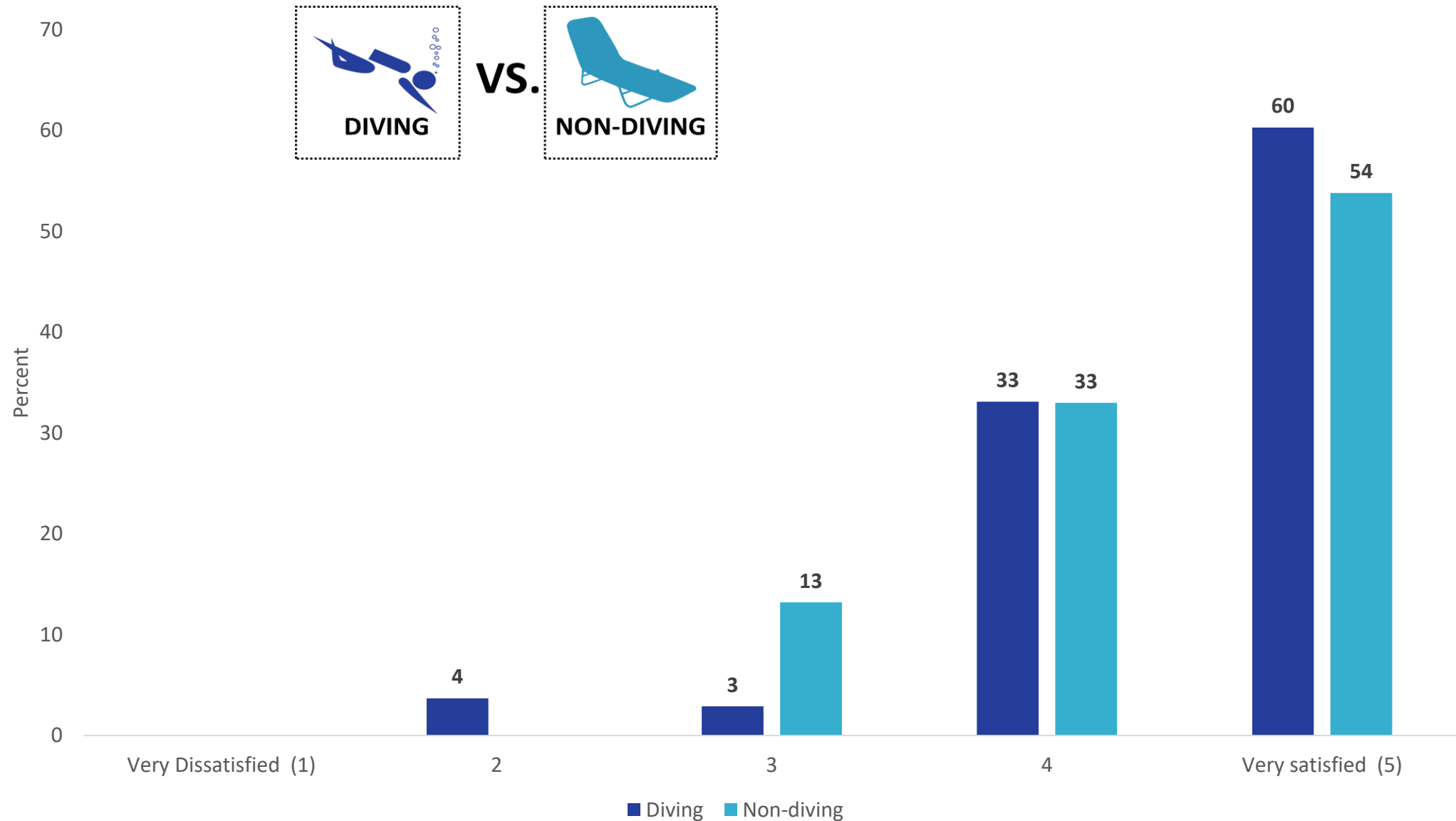
**TOTAL  
CONTRIBUTION  
PER PERSON  
PER VISIT**

**US\$1,357**

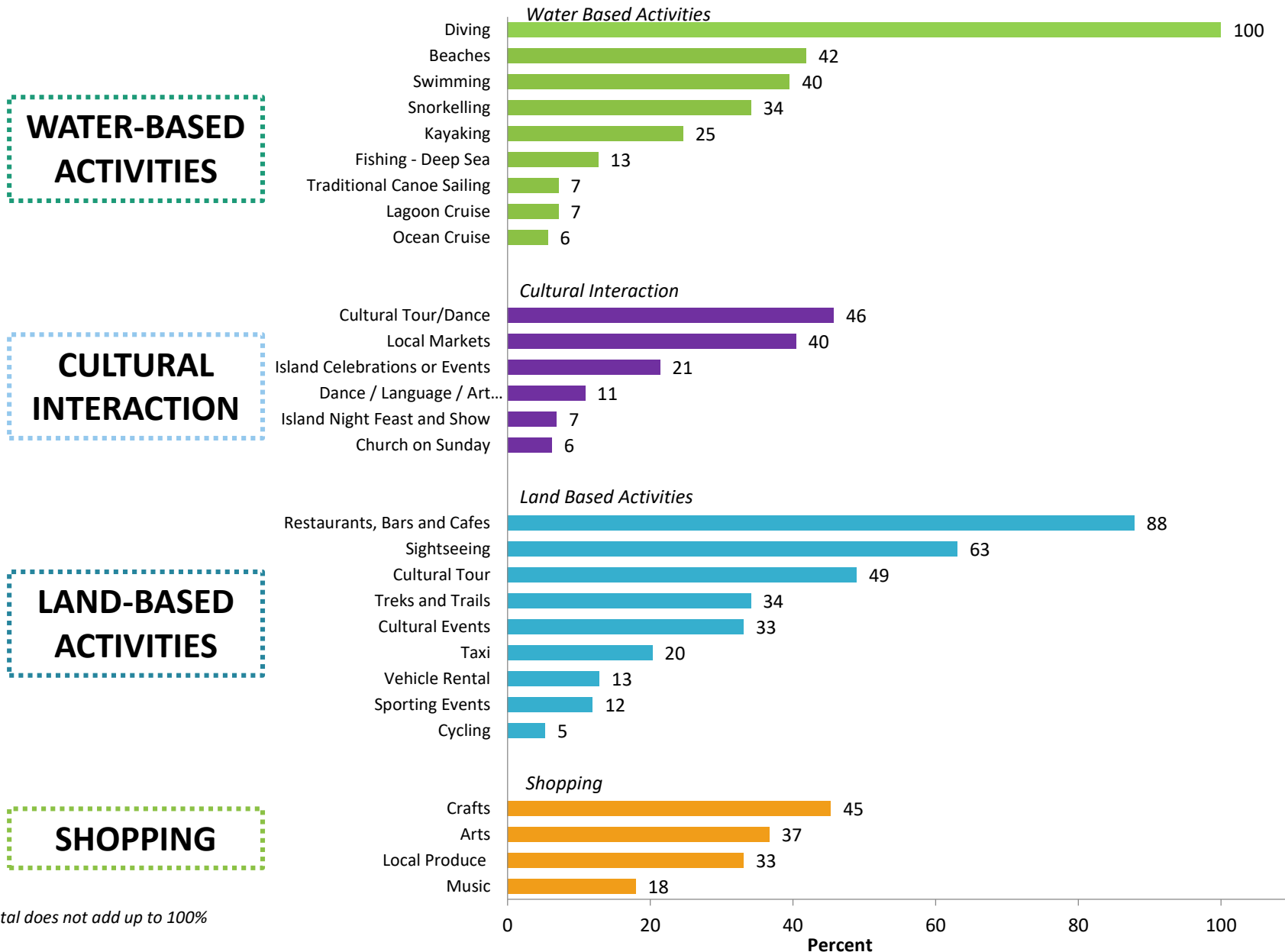
PER DAY  
PER PERSON

**US\$82**

# Overall satisfaction with the experience of Yap



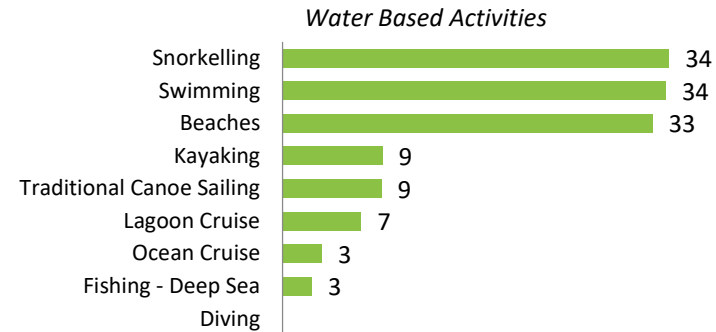
# Degree of participation (%) in activities for divers



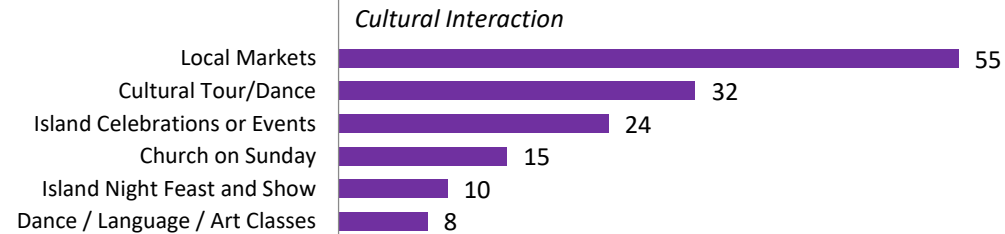
Note: Multiple responses, therefore total does not add up to 100%

# Degree of participation (%) in activities for non-divers

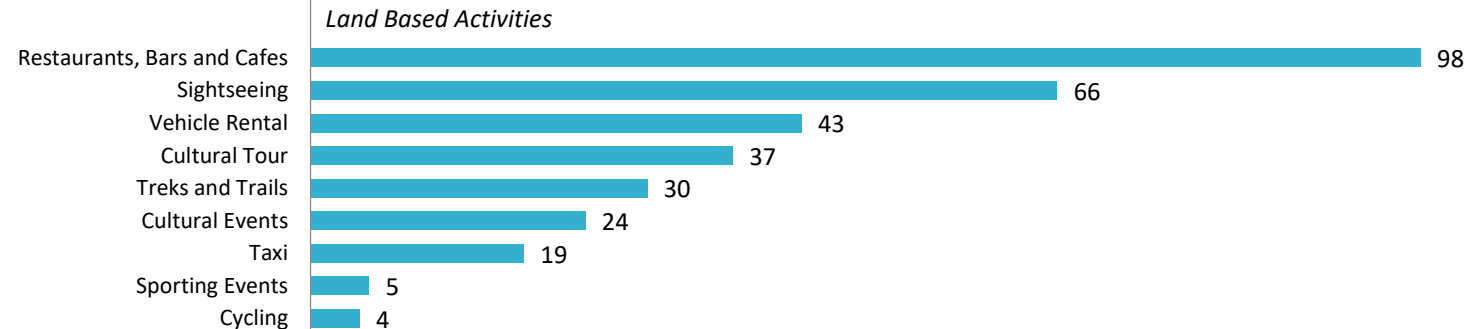
## WATER-BASED ACTIVITIES



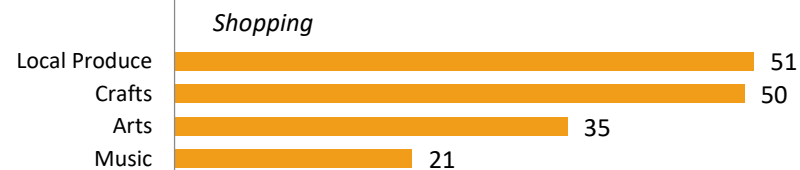
## CULTURAL INTERACTION



## LAND-BASED ACTIVITIES



## SHOPPING

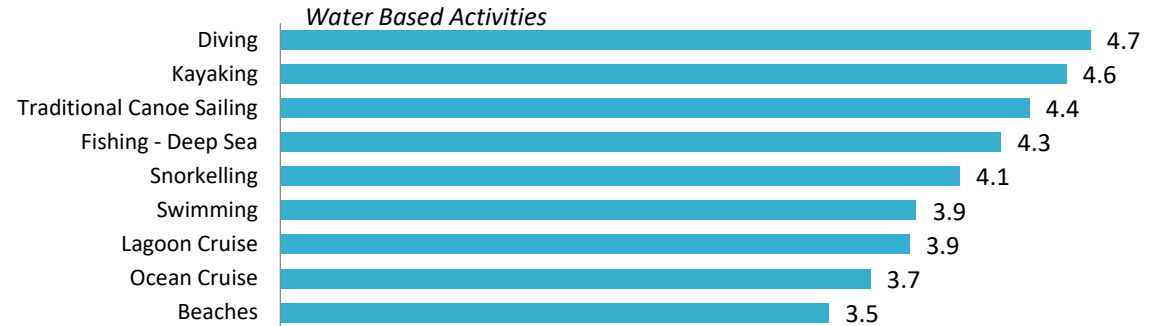


Note: Multiple responses, therefore total does not add up to 100%

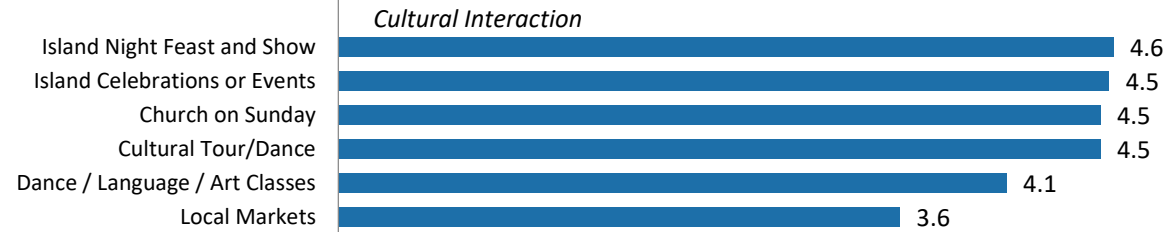
Percent

# Degree of satisfaction in activities for divers

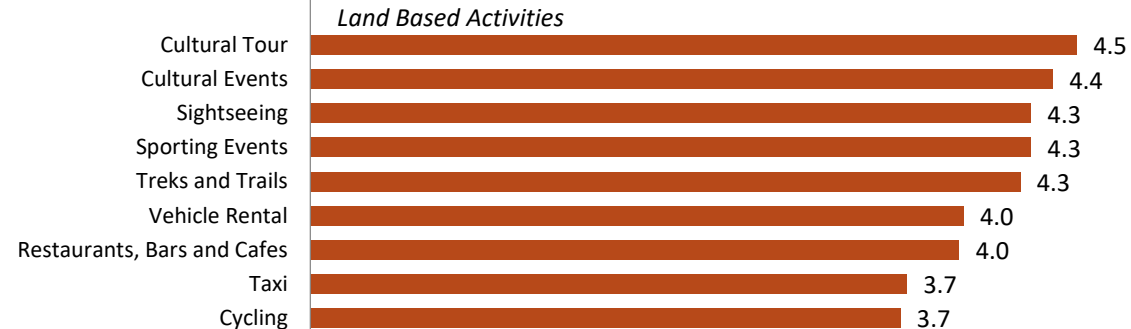
## WATER-BASED ACTIVITIES Average 4.1



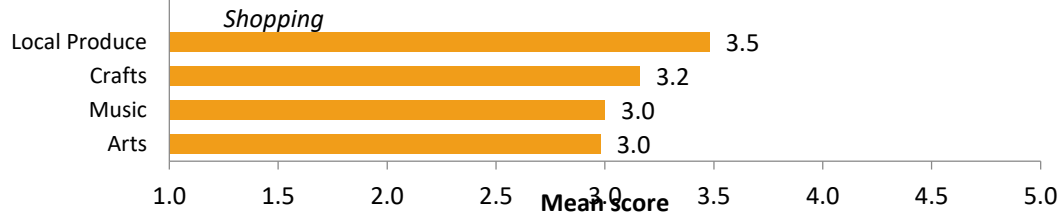
## CULTURAL INTERACTION Average 4.3



## LAND-BASED ACTIVITIES Average 4.1

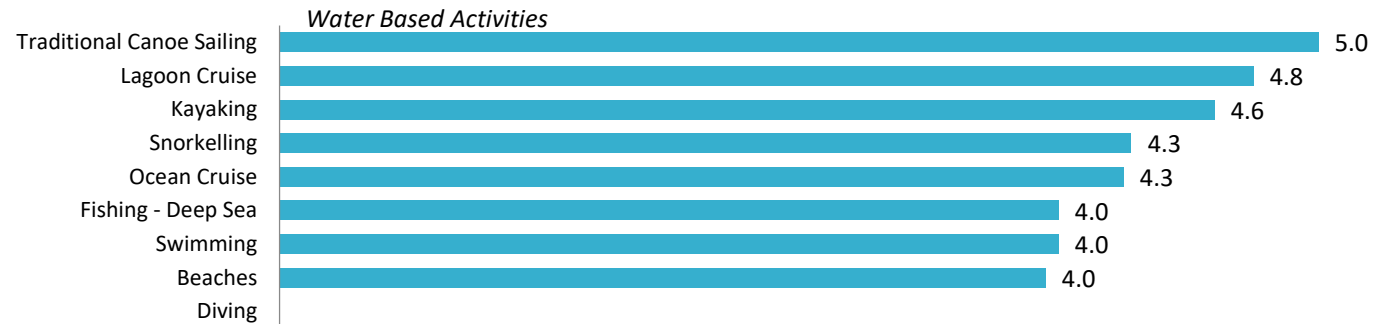


## SHOPPING Average 3.2



# Degree of satisfaction in activities for non-divers

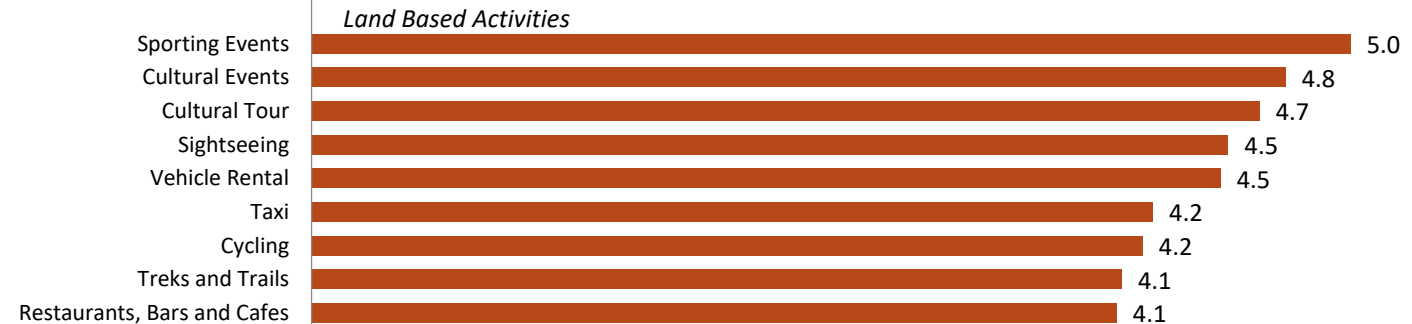
## WATER-BASED ACTIVITIES Average 4.4



## CULTURAL INTERACTION Average 4.7



## LAND-BASED ACTIVITIES Average 4.5



## SHOPPING Average 3.7

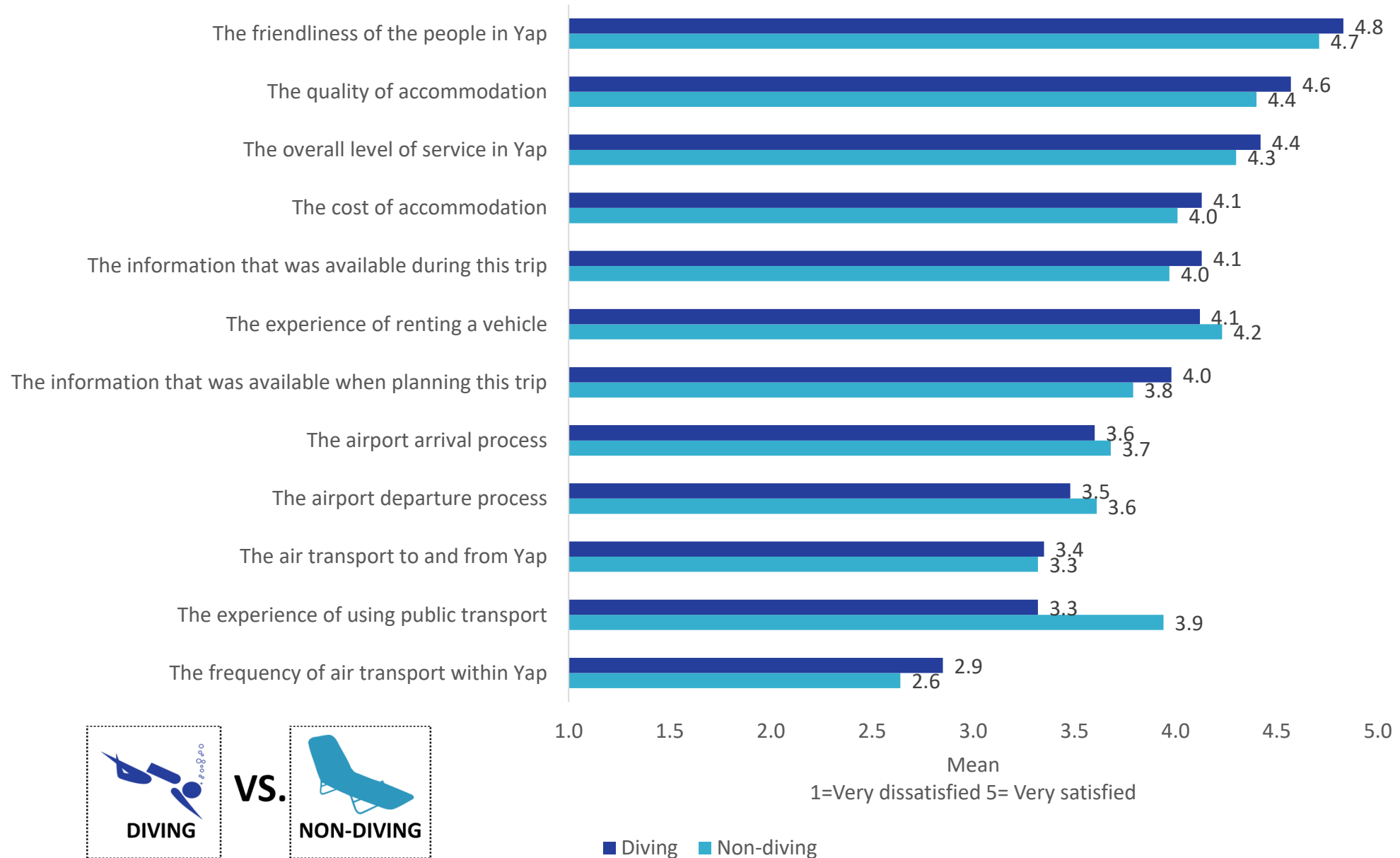


Mean score

# Degree of satisfaction (Key statements)

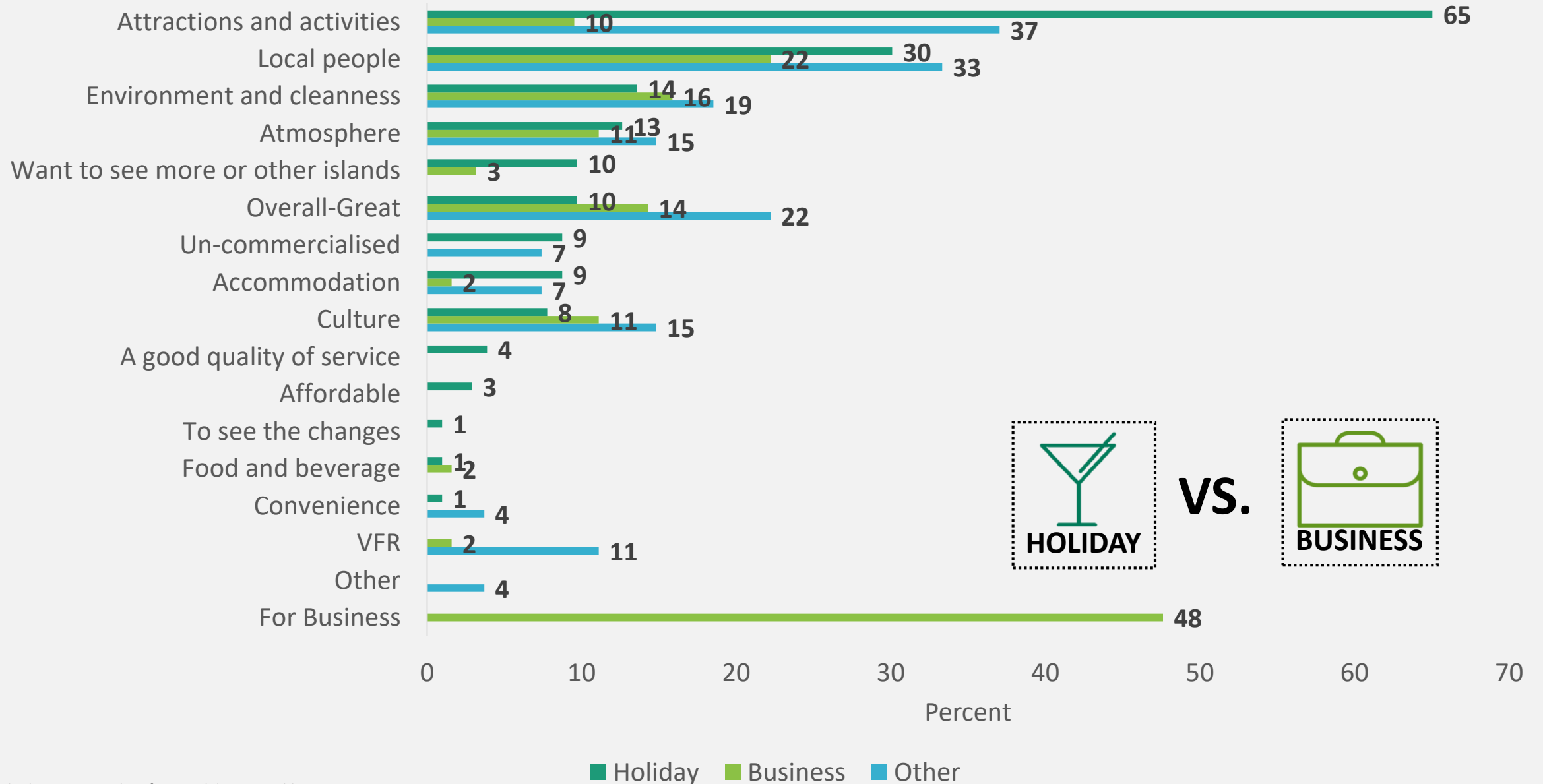


# Degree of satisfaction (Key statements)





# Reasons for returning to Yap

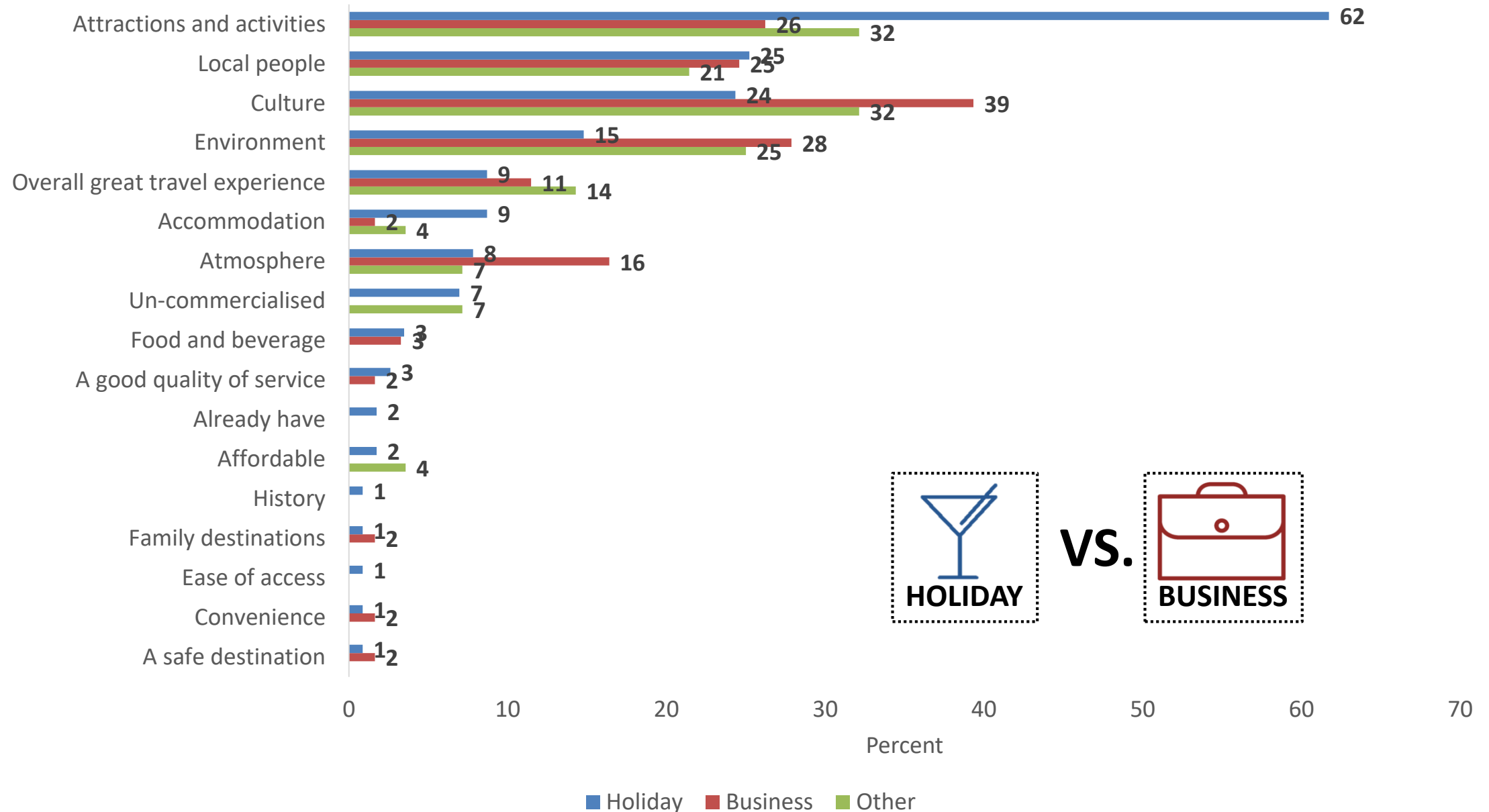


Note: Multiple responses, therefore total does not add up to 100%

# Willingness to Return

Country/State	%
Cook Islands	93
Niue	91
Yap	87
Samoa	91
Vanuatu	82
PNG	93
Solomon Is	88

# Reasons to recommend Yap to others



# Willingness to Recommend

Country/State	%
Cook Islands	98
Niue	97
Yap	96
Samoa	95
Vanuatu	
PNG	
Solomon Is	83