

Vanuatu International Visitor Survey

Jan – Dec 2019



AUT



**NEW ZEALAND
FOREIGN AFFAIRS & TRADE**
MANATŪ AORERE



Vanuatu
TOURISM OFFICE
ANSWERING THE CALL

NZTRI
NEW ZEALAND TOURISM
RESEARCH INSTITUTE

Summary of the key findings

Total Direct Economic Impact for Jan-Dec 2019

US\$170.7 Million (Vt 19.5 billion) directly flowing to Vanuatu Economy
US\$ 1,416 (Vt 155,878) per visitor per Trip; 120,628 visitors in total
US\$179 (Vt 19,705) per visitor per day

Respondent Profile and Characteristics

- 67% from Aus/NZ
- 73% under 59 years
- 56% female
- 72% household income less than \$100,000

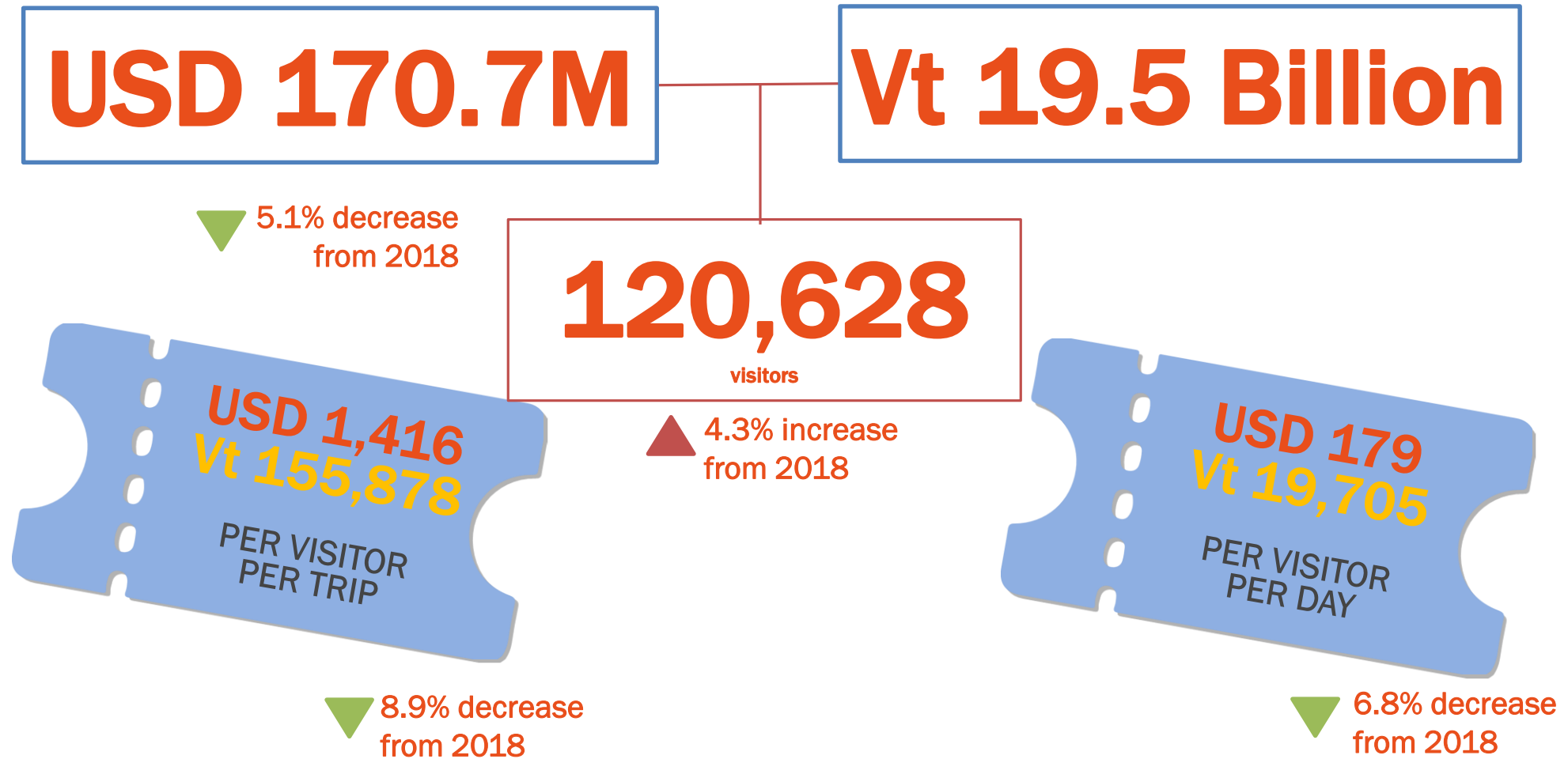
Decision Making

- Google, friends and family, and Trip Advisor are key sources for finding Vanuatu as a destination
- 35% purchased directly with airlines and/or an accommodation provider

Satisfaction

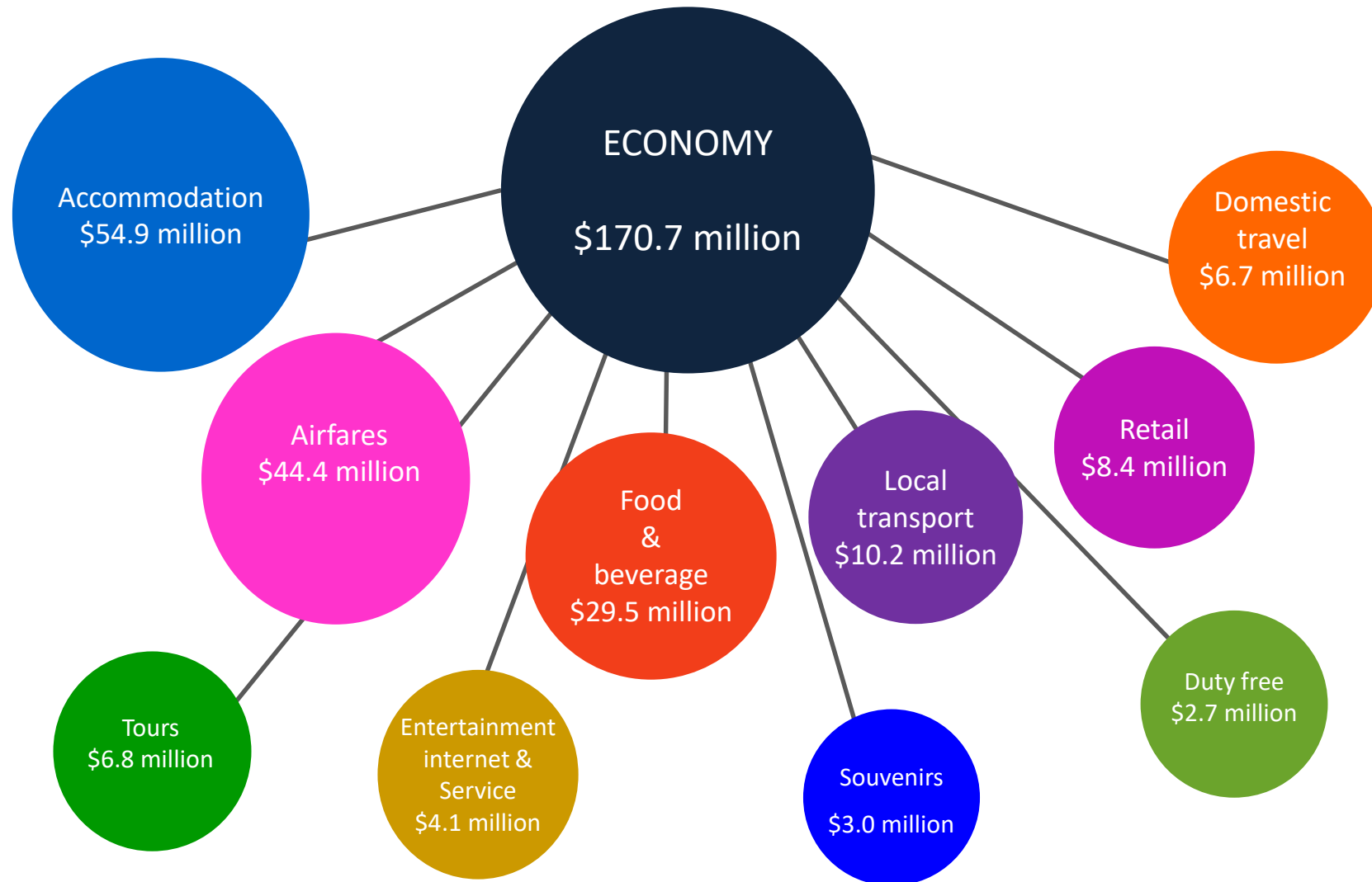
- 81% would come back
- Satisfied with local people; activities and attractions; and environment
- Public service and facilities; rubbish; prices of goods and services least appealing

Summary of the key findings: Visitor spend



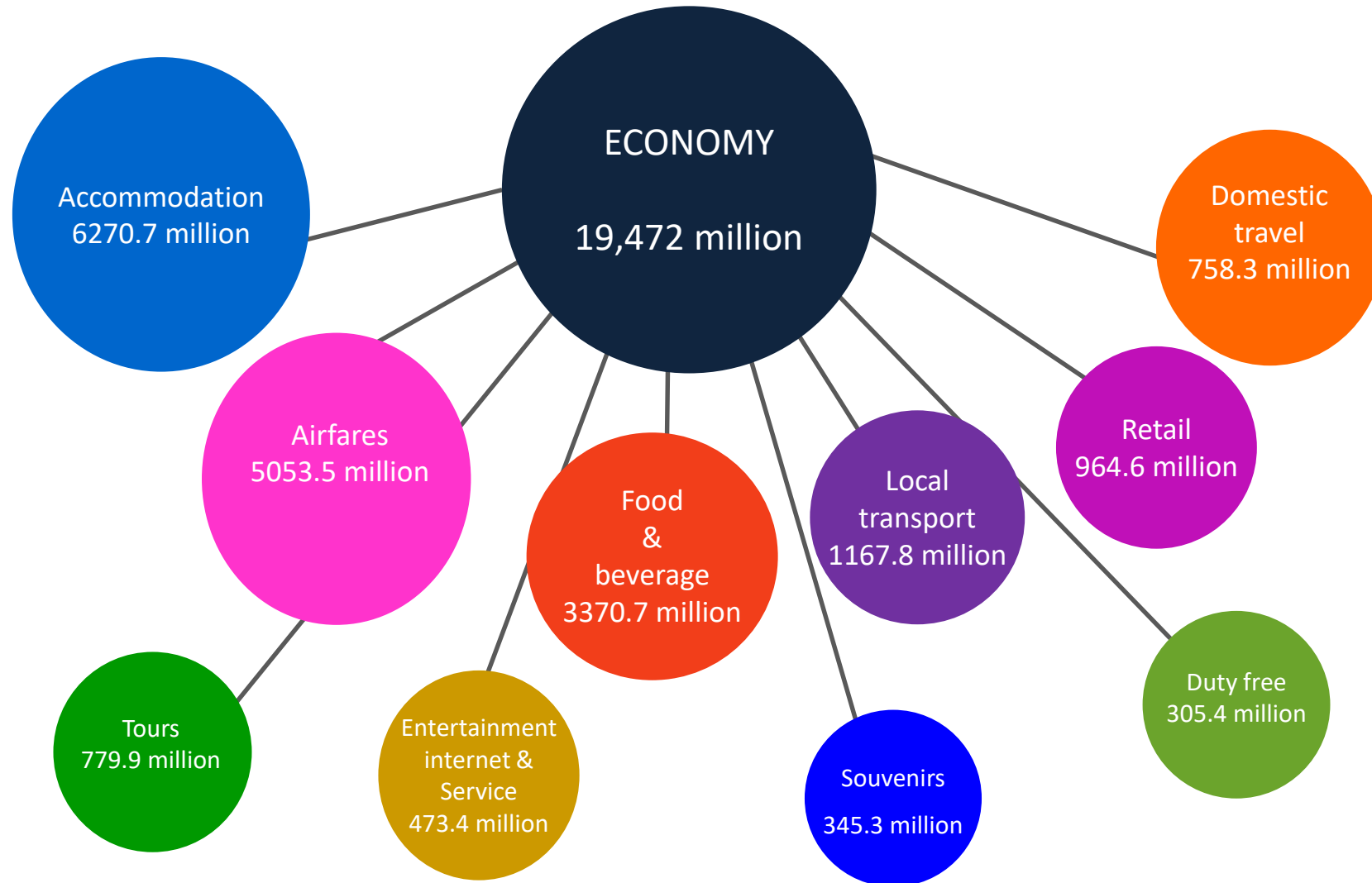
Direct economic impact for Jan – Dec 2019

Pre-arrival and in-country spend (USD)



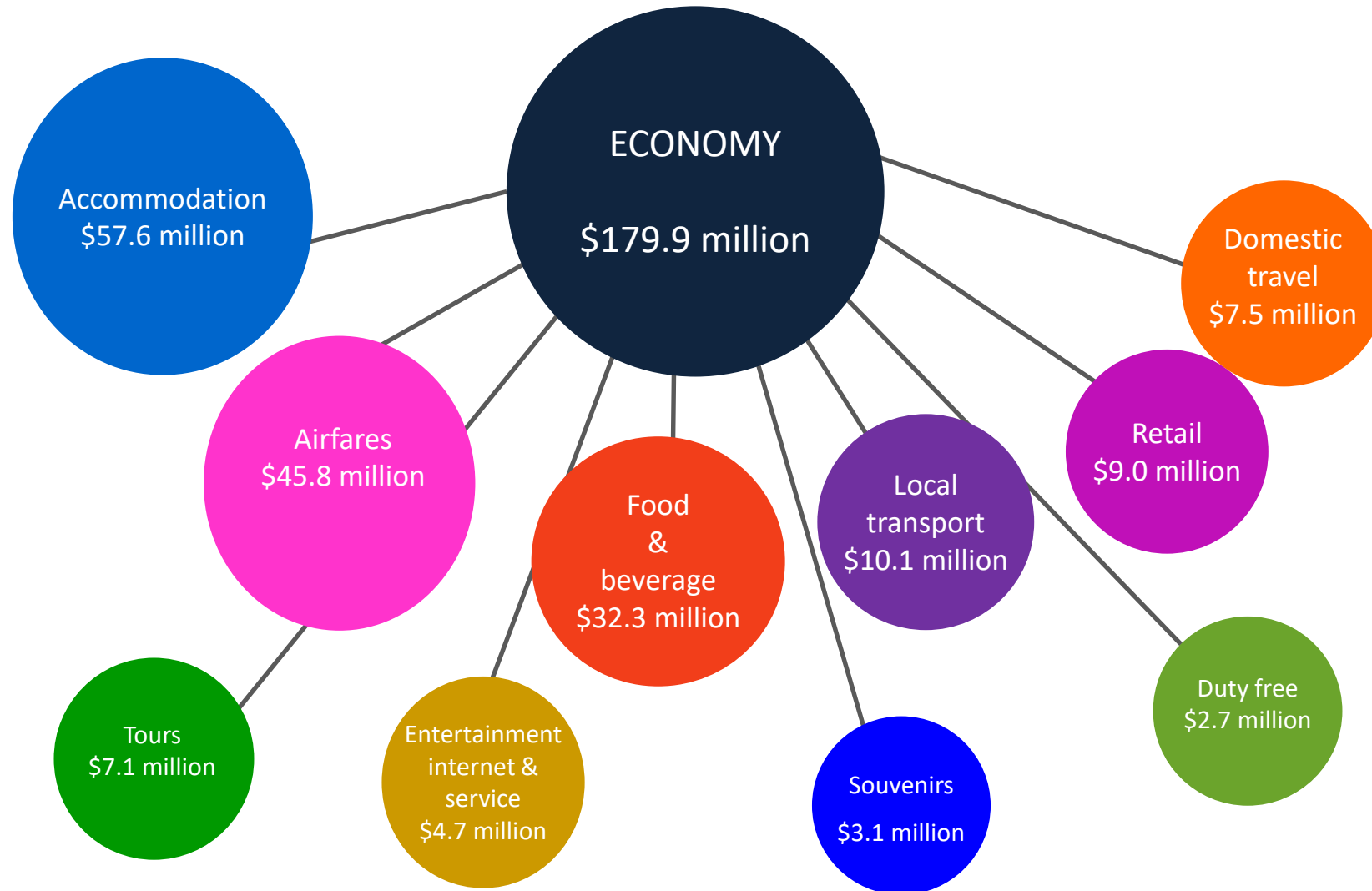
Direct economic impact for Jan – Dec 2019

Pre-arrival and in-country spend (VUV)



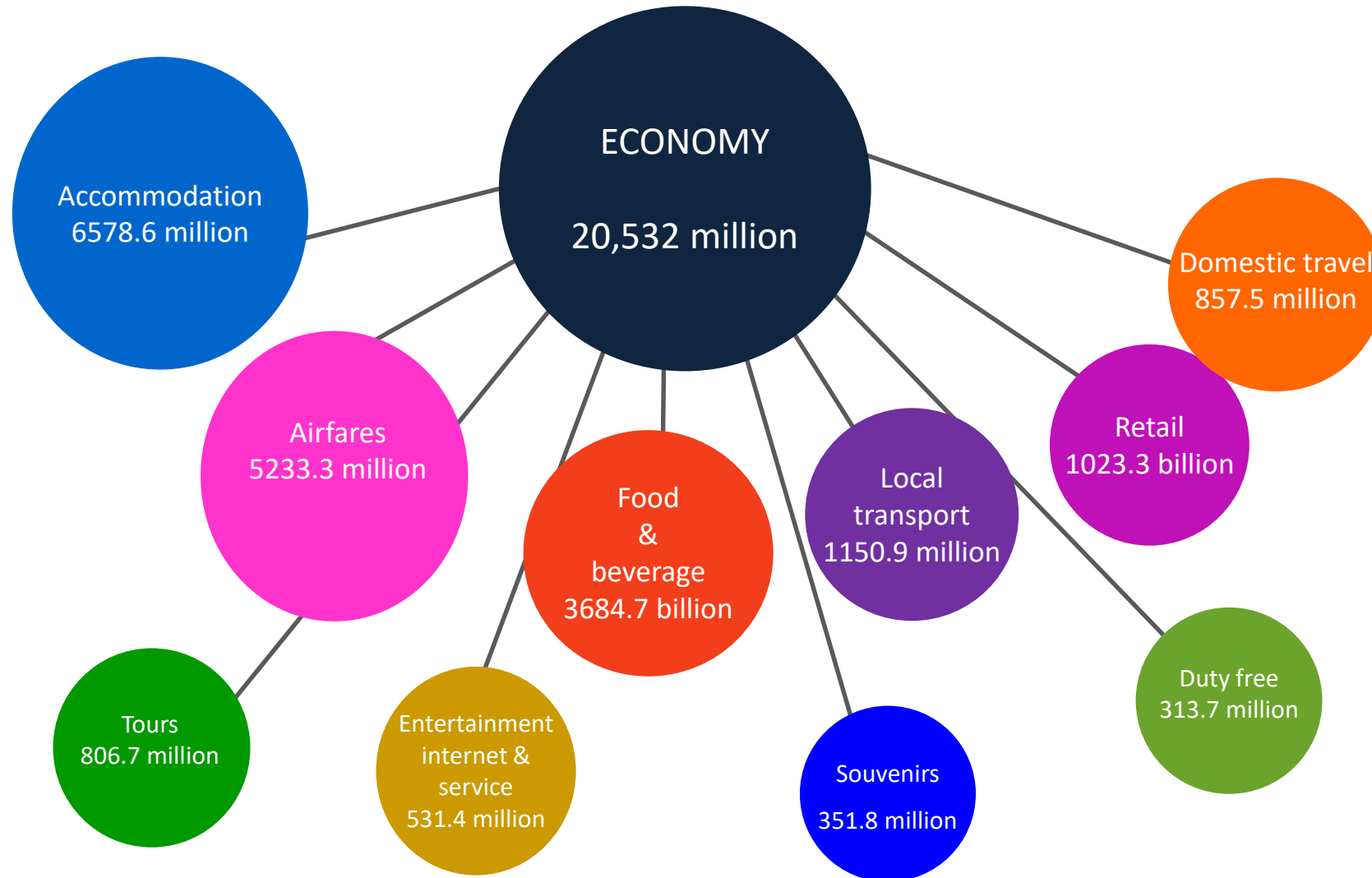
Direct economic impact for Jan – Dec 2018

Pre-arrival and in-country spend (USD)



Direct economic impact for Jan – Dec 2018

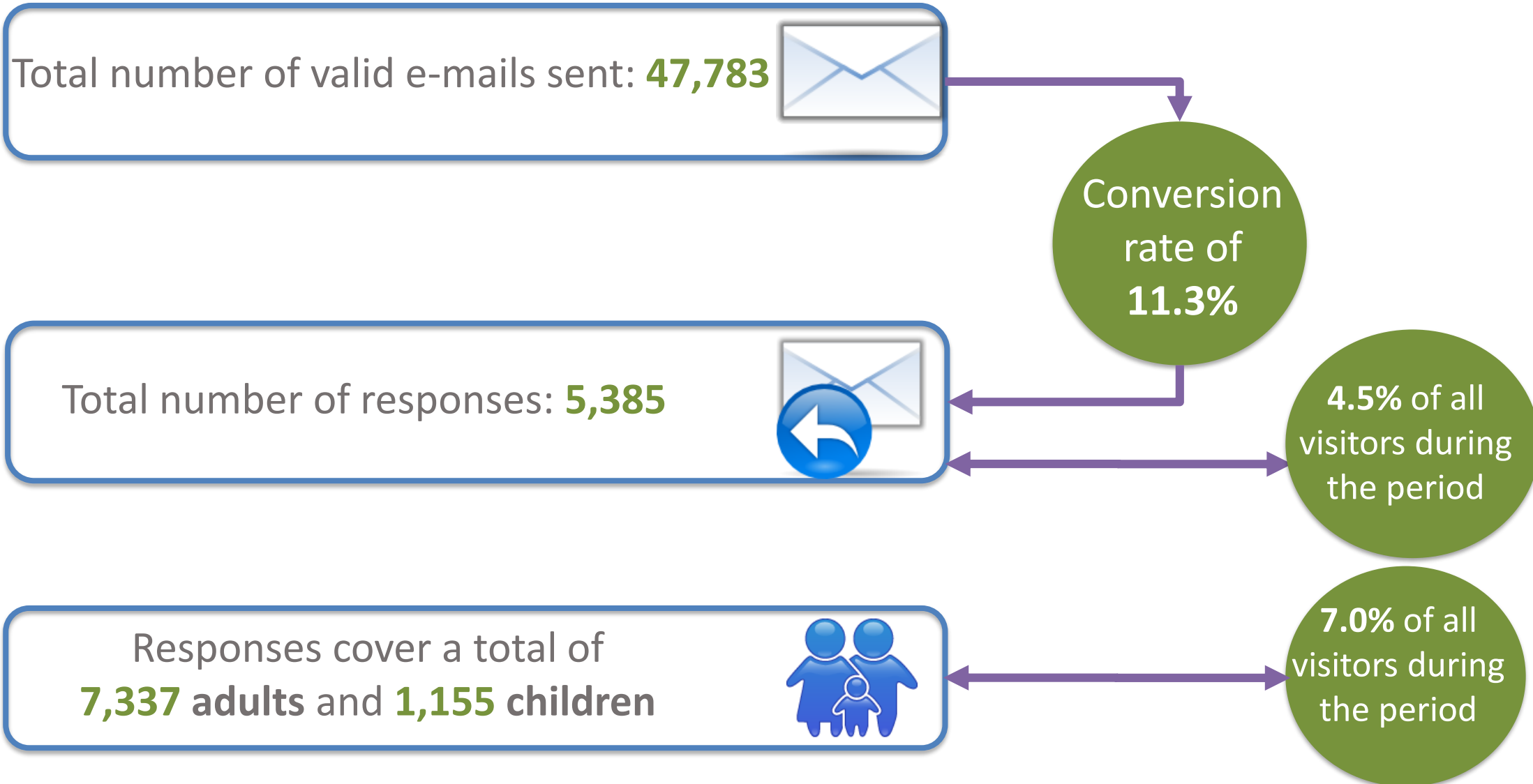
Pre-arrival and in-country spend (VUV)



Presentation structure



Respondents (Jan – Dec 2019)



IVS respondents (Jan 2015 – Dec 2019)



Respondents
to date
25,440



Total people
included in
expenditure sections
46,426

Visitor characteristics - IVS respondent data



Household Income

39% Under \$50,000
33% \$50,000 - \$100,000
28% Over \$100,001



Age

18% 30-39 years old
19% 40-49 years old
21% 50-59 years old

Gender



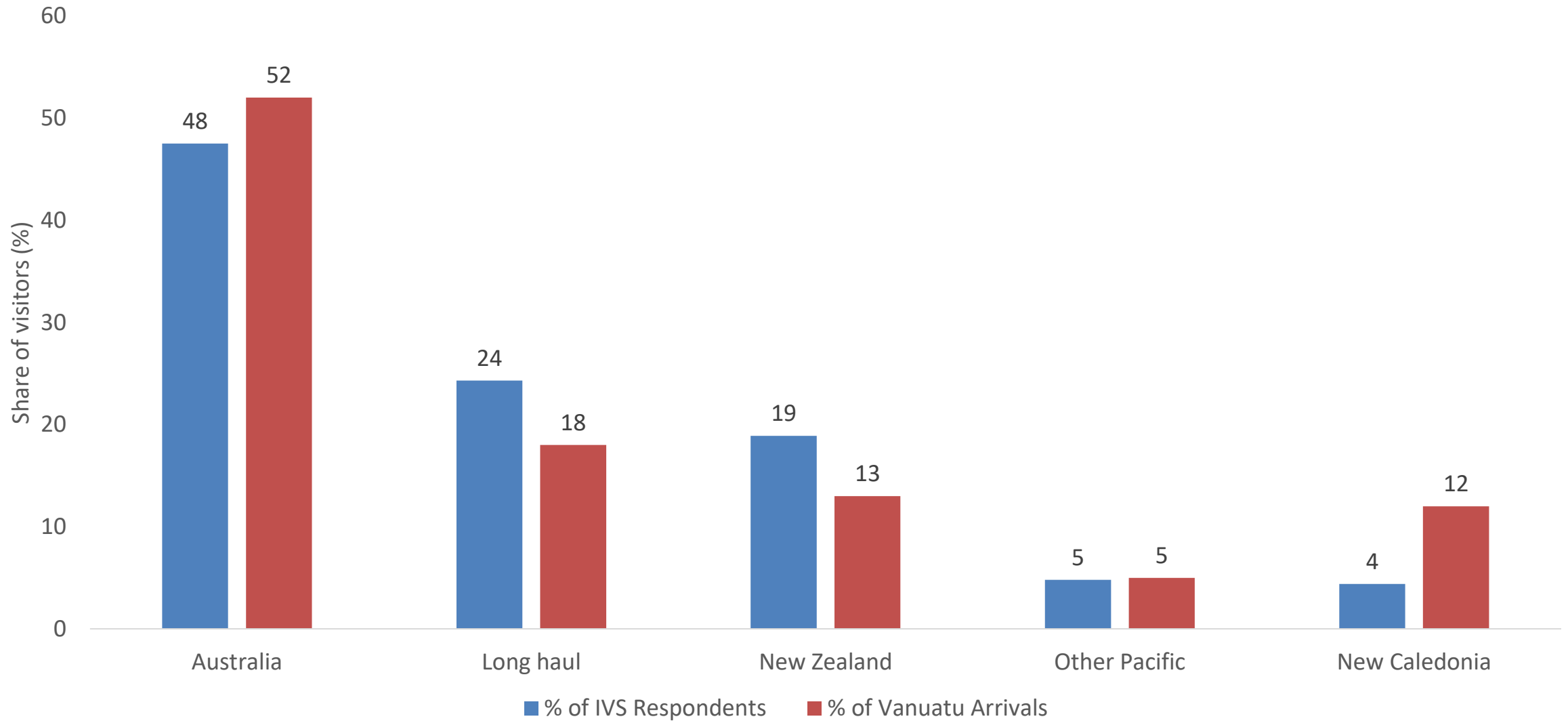
Females



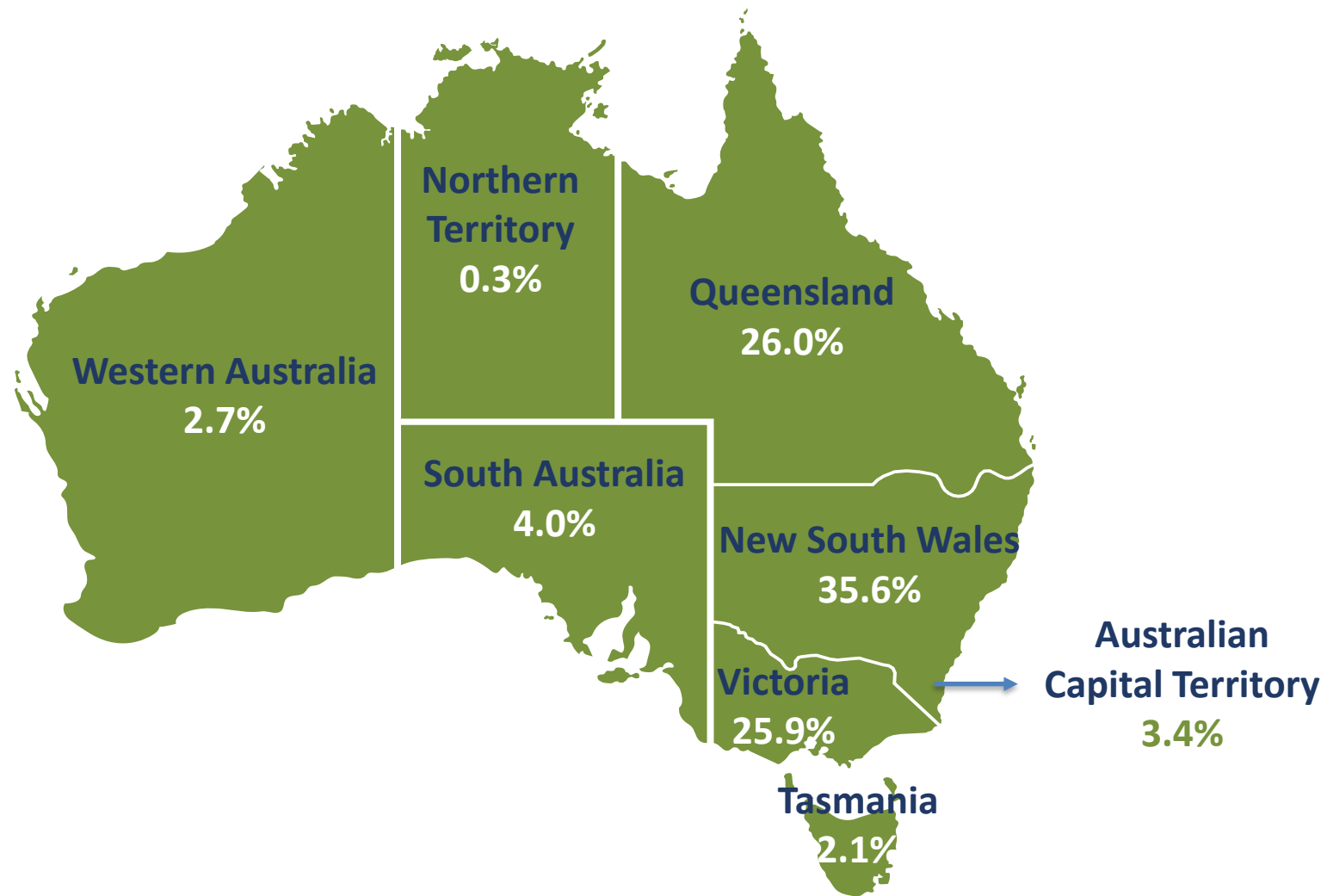
Country of Origin

48% Australia
19% New Zealand
24% Long Haul
4% New Caledonia
5% Other Pacific

Country of origin

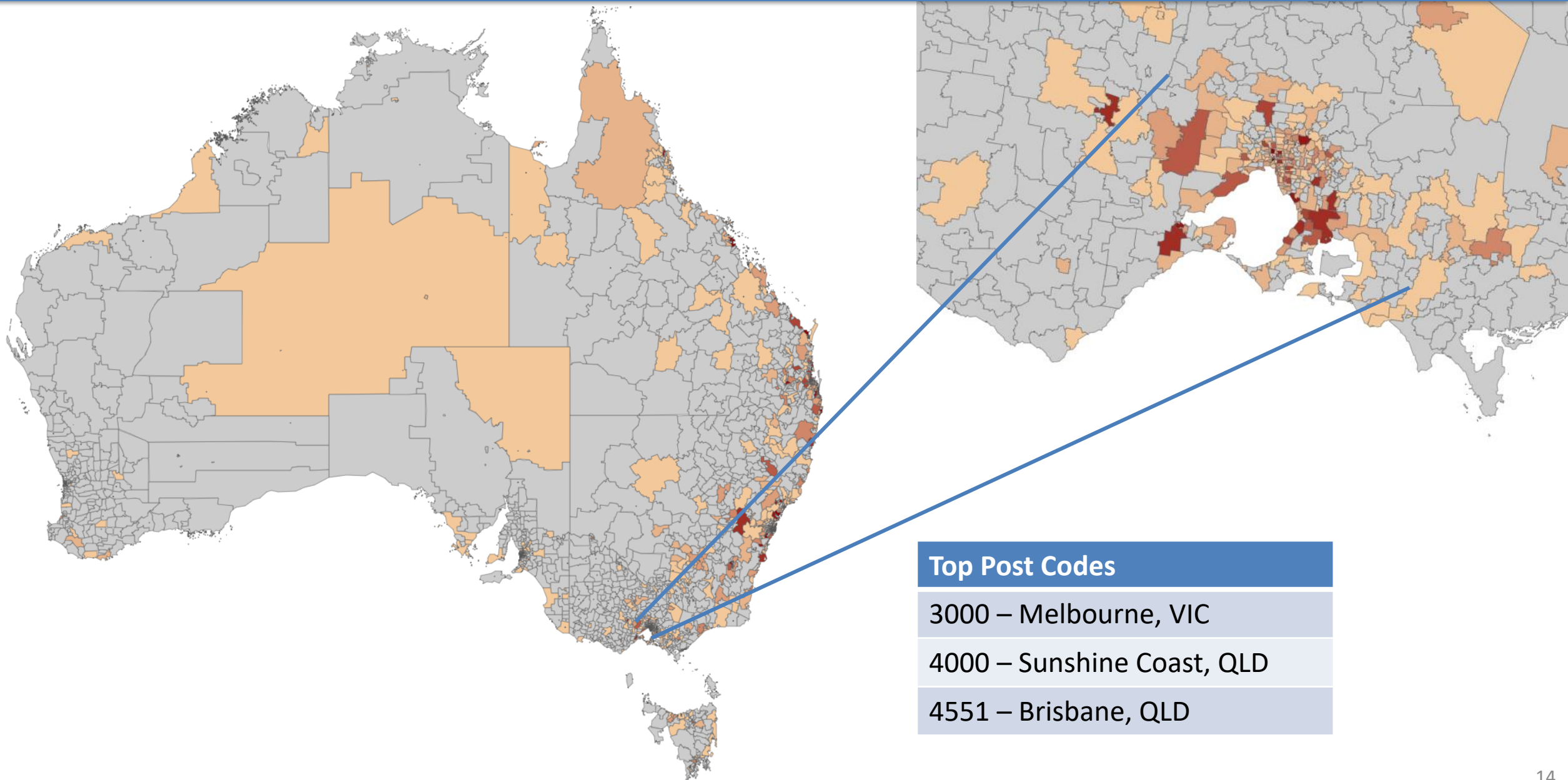


Australian respondents - IVS respondent data

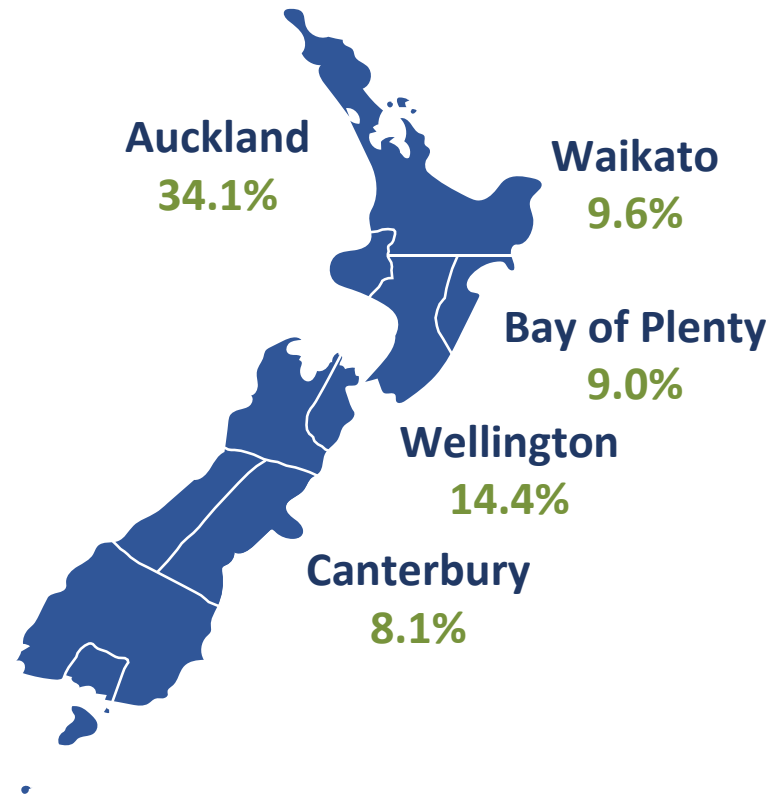


New South Wales, Queensland and Victoria make up **87.5%** of all Australian visitor arrivals

Heat Maps for Australia (January-December 2019)

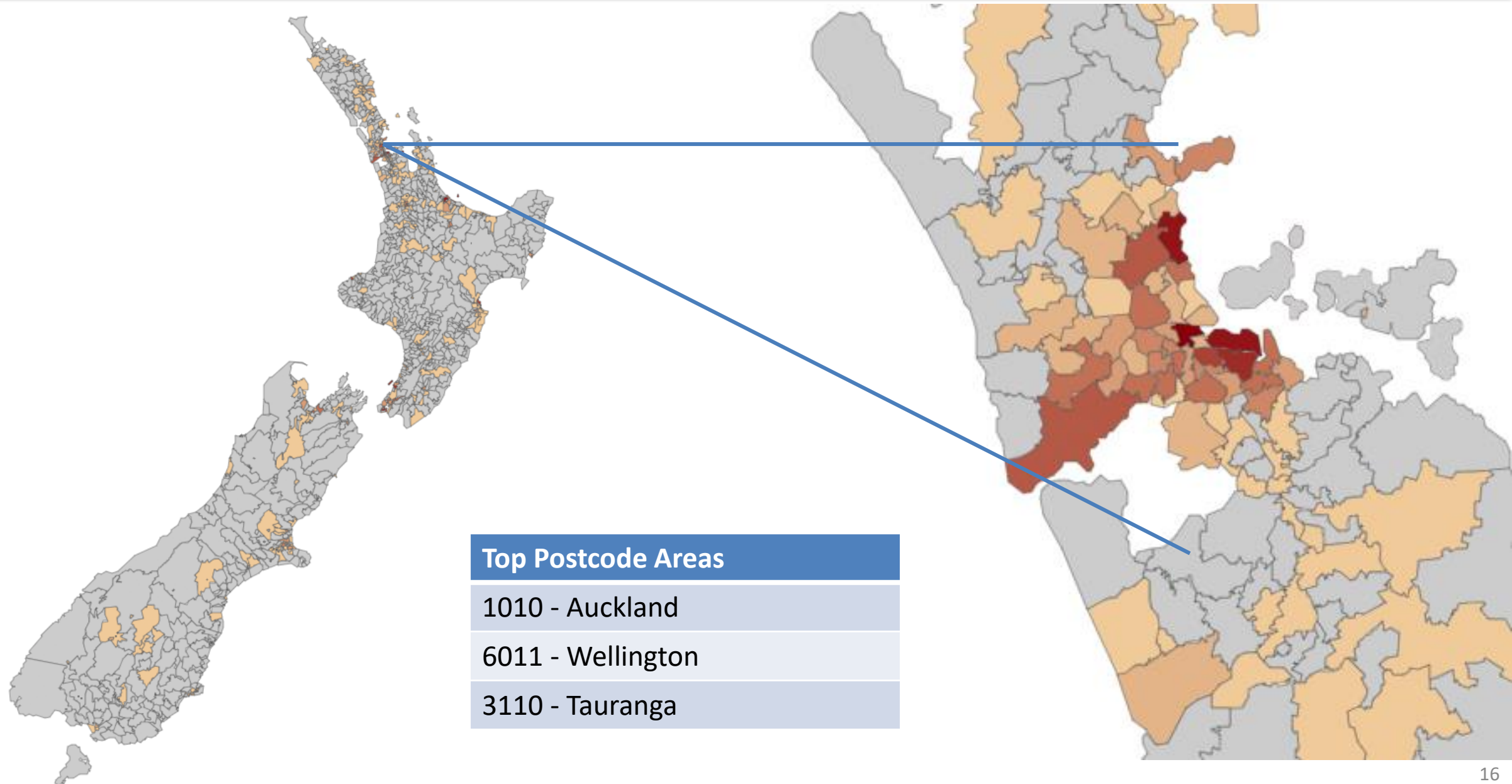


New Zealand respondents - IVS respondent data



Auckland, Waikato, Canterbury, Wellington, and Bay of Plenty make up **75.2%** of all New Zealand visitor arrivals

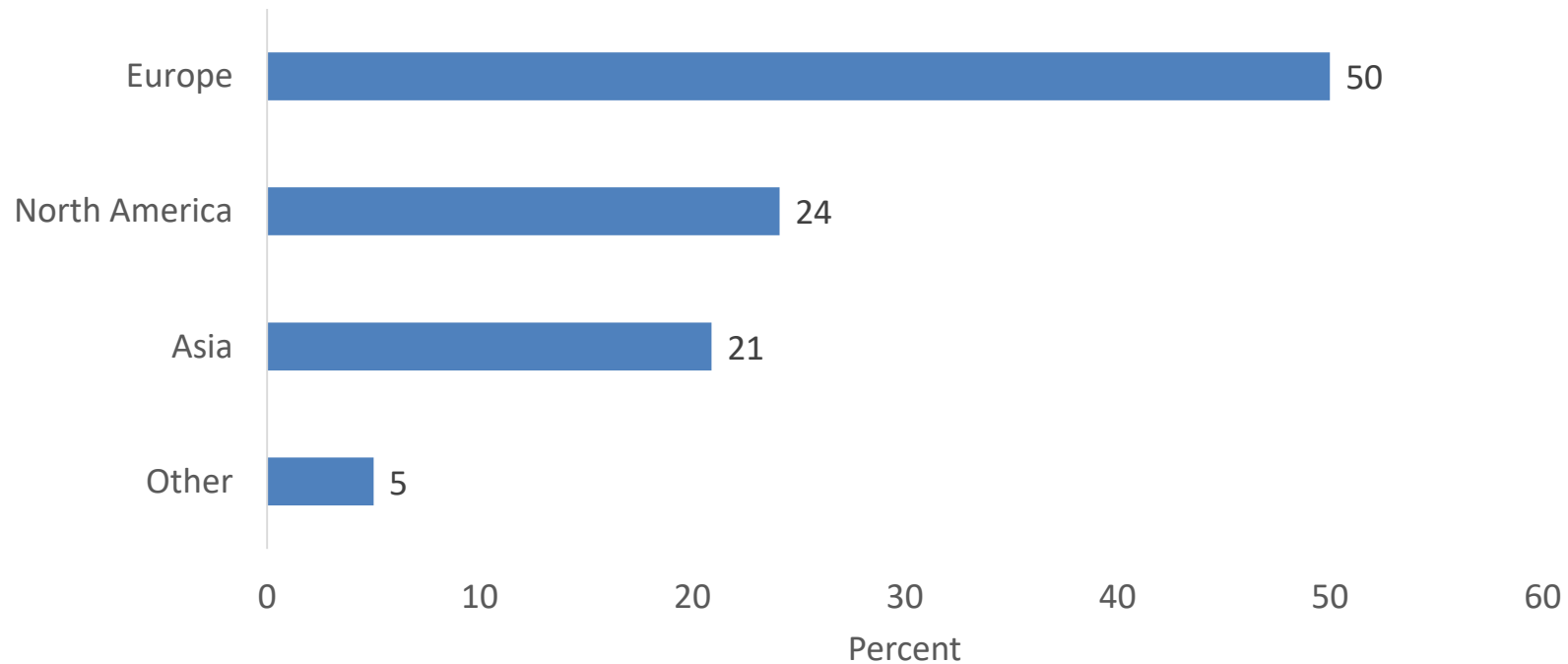
Heat Maps for New Zealand (January-December 2019)



Long haul market- Region breakdown

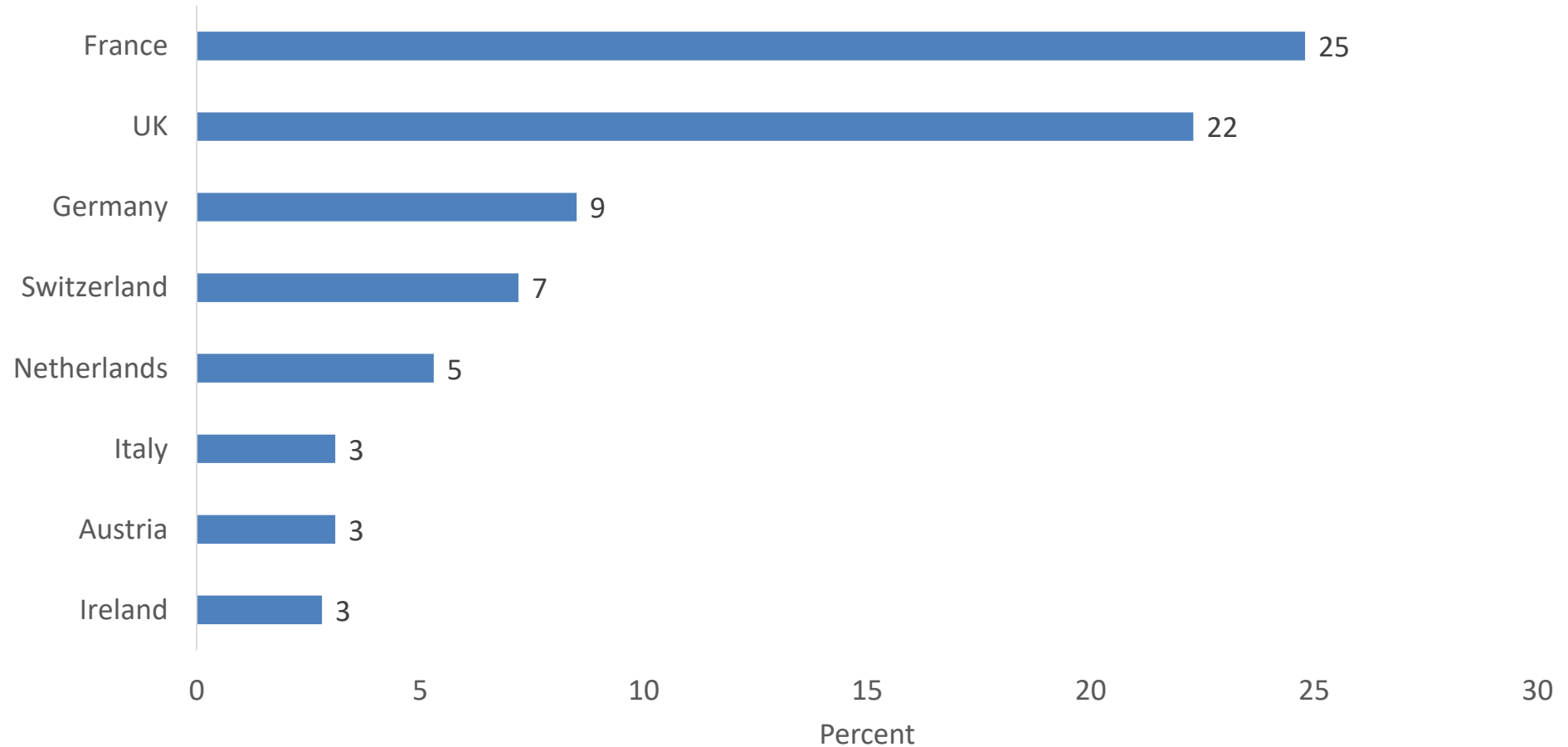
Long Haul – Region breakdown

24% of IVS respondents



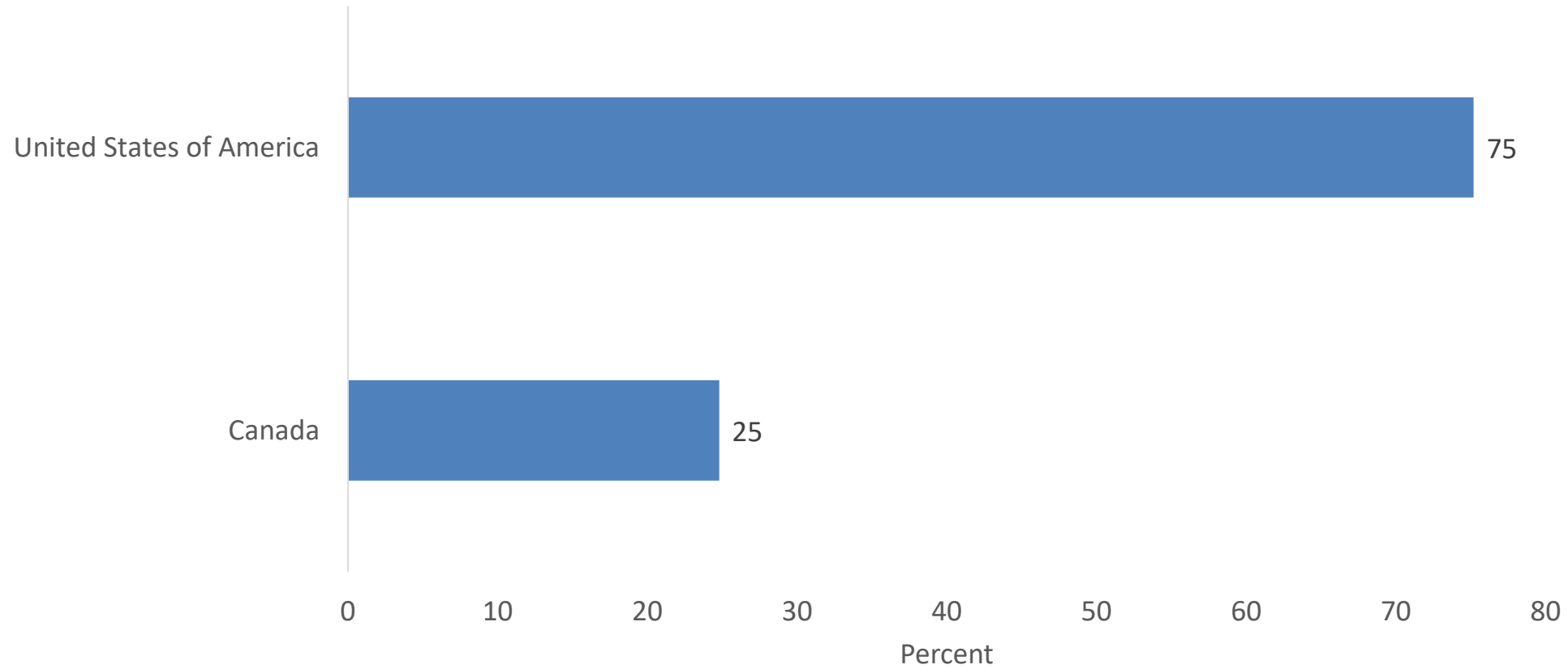
Long haul market – Europe

Europe (Top 8 countries)



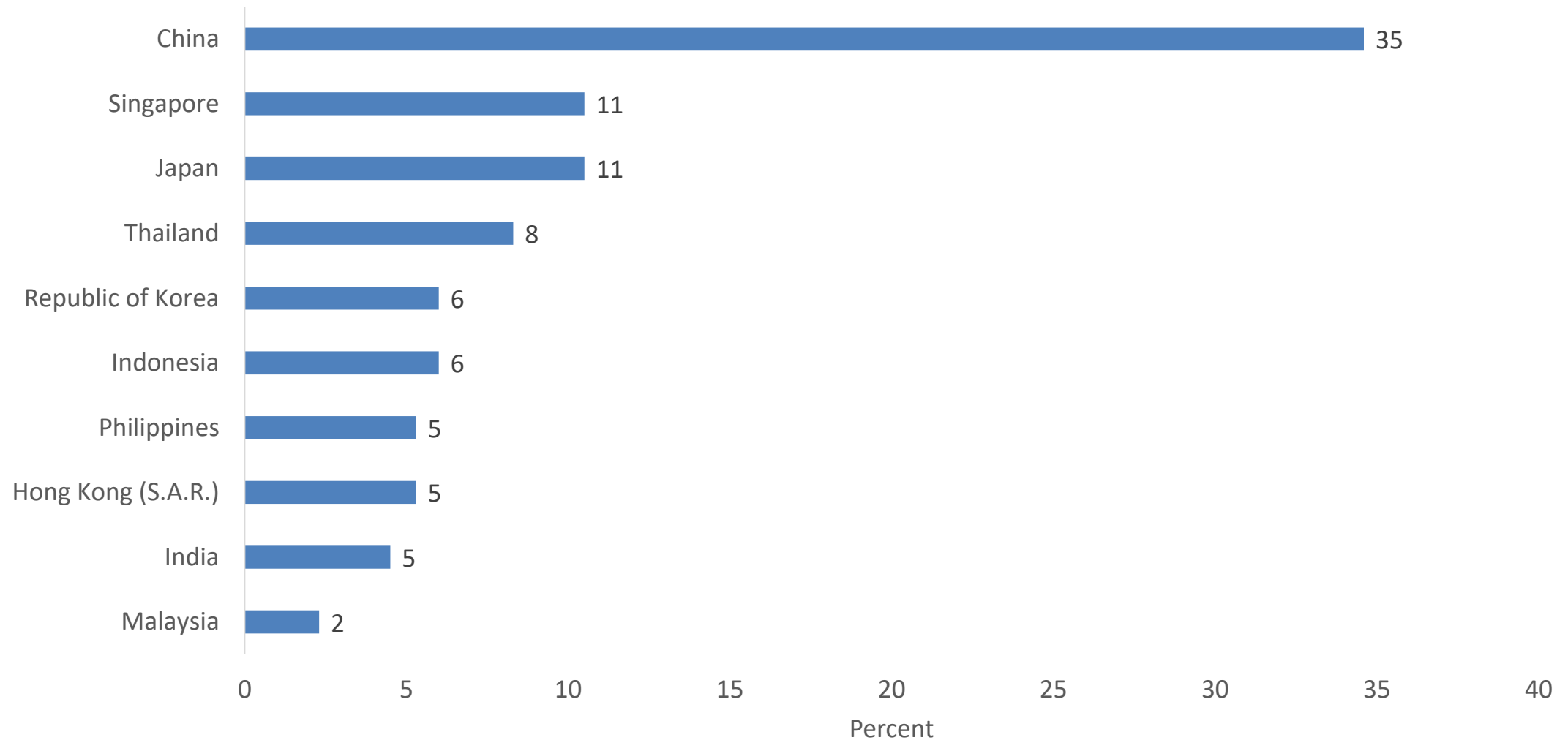
Long haul market – North America

North America

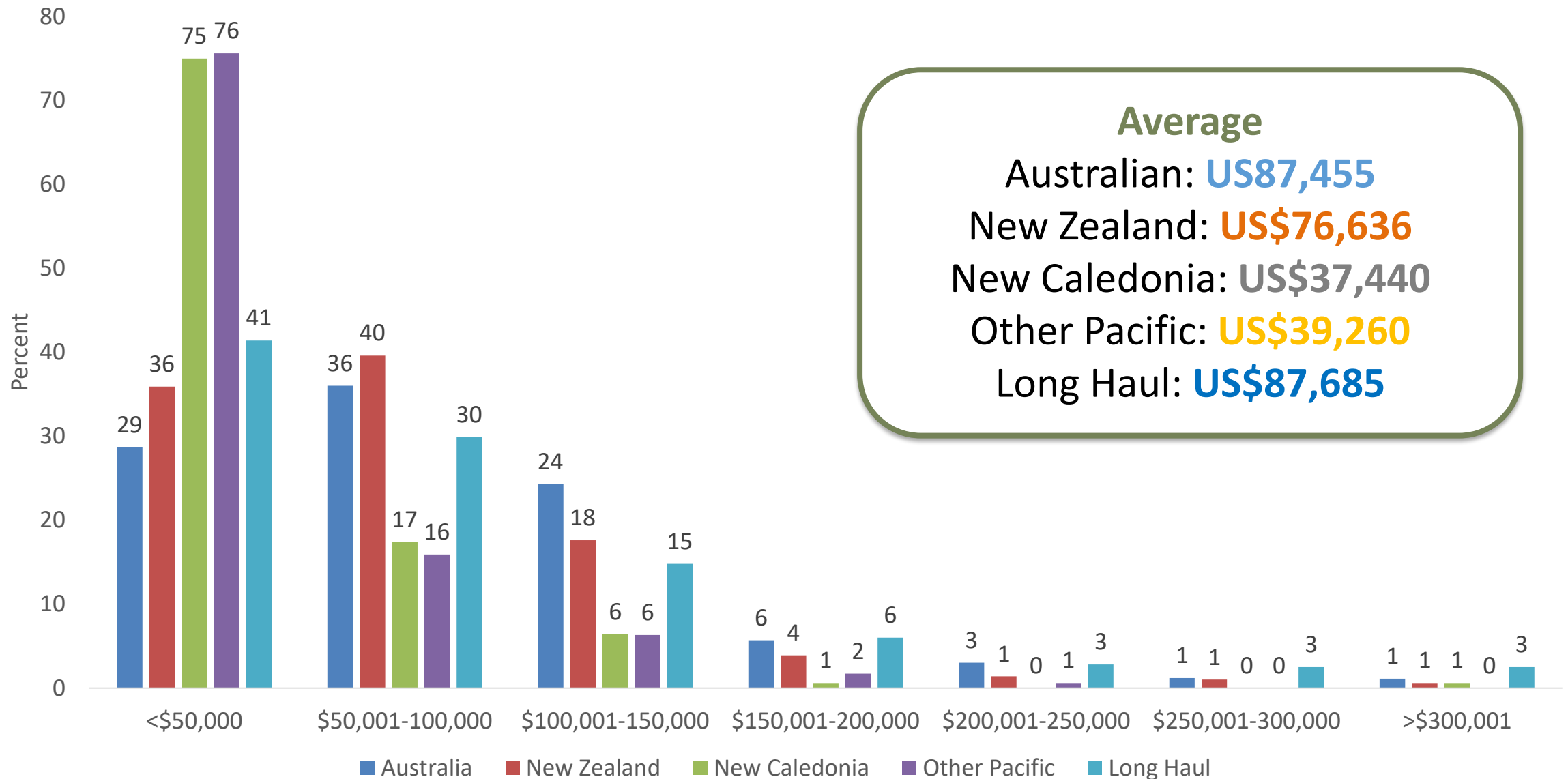


Long haul market – Top countries

Asia (top 10 countries)



Annual household income



Presentation structure



Visitor characteristics – Summary



Airlines Used

61% Air Vanuatu
20% Virgin Australia
10% Qantas (code share)
9% Aircalin
8% Fiji Airlines



Length of Stay

7.9 Nights on average
60% Stayed up to 1 week (7 nights)



Previous Visits

54% First trip
25% 1 or 2 times



Travel Companions

19% Travel by themselves
81% Travel with others



Purpose of Visit

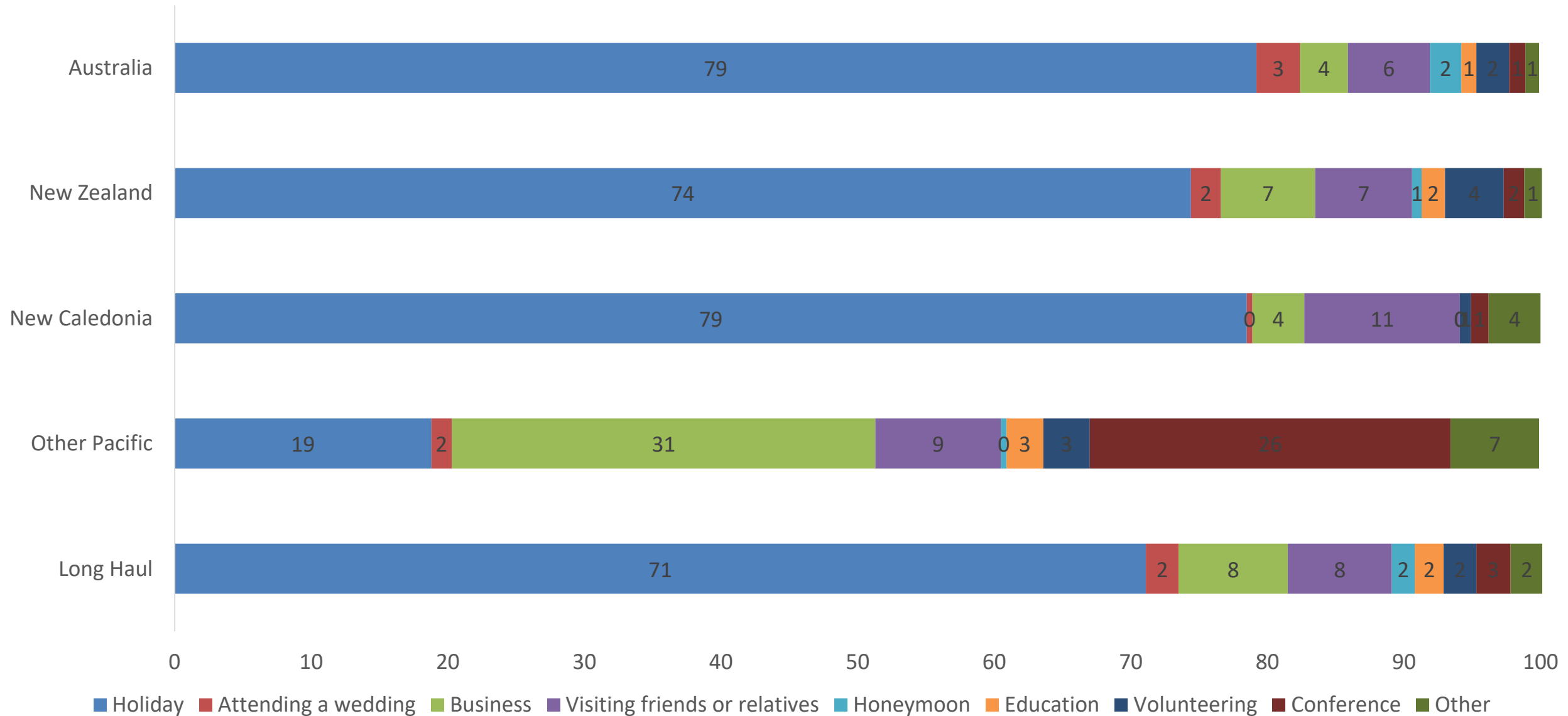
74% Holiday
7% Visiting friends/family
6% Business/Conference



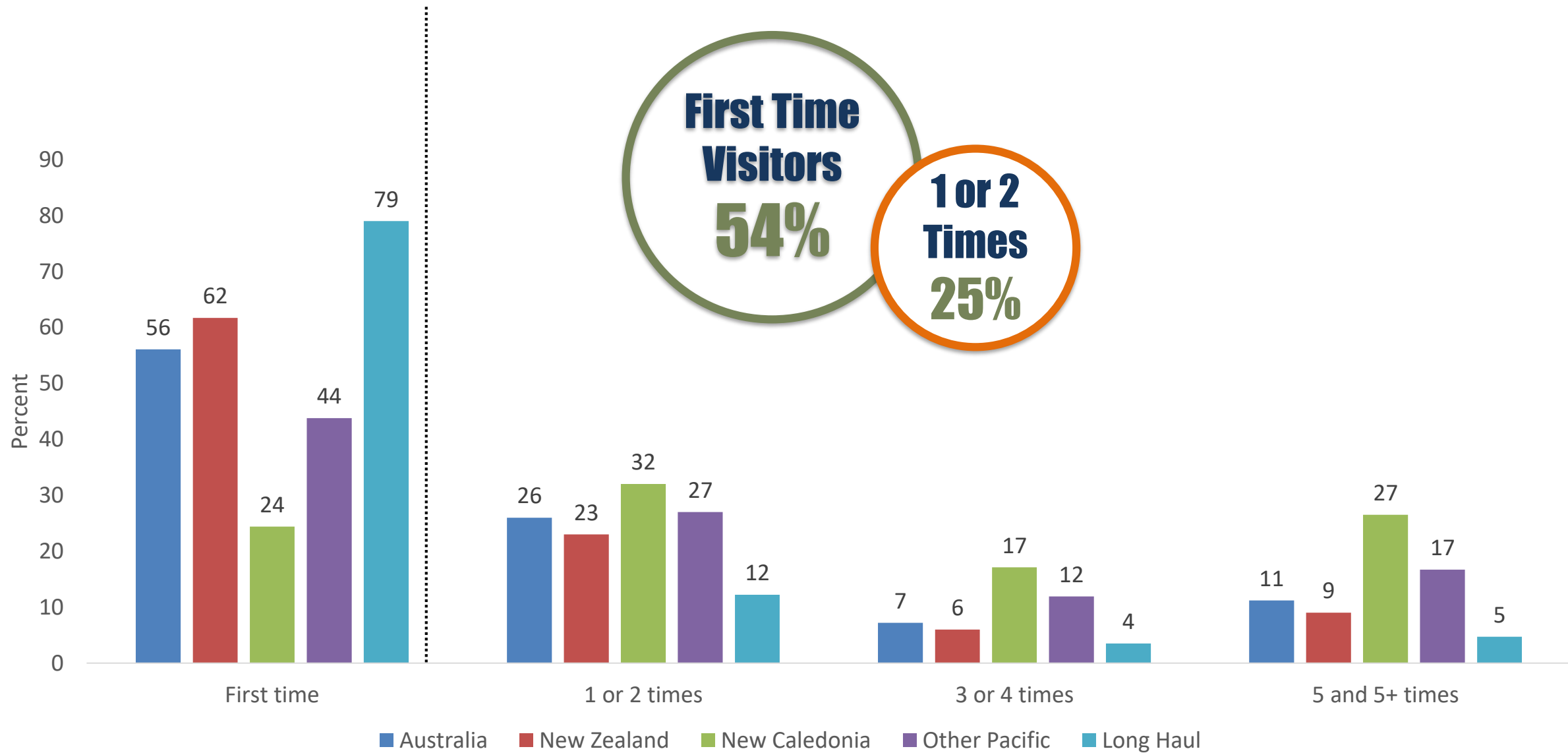
Islands Visited on Trip

96% Efate (Port Vila)
18% Tanna
14% Espiritu Santo

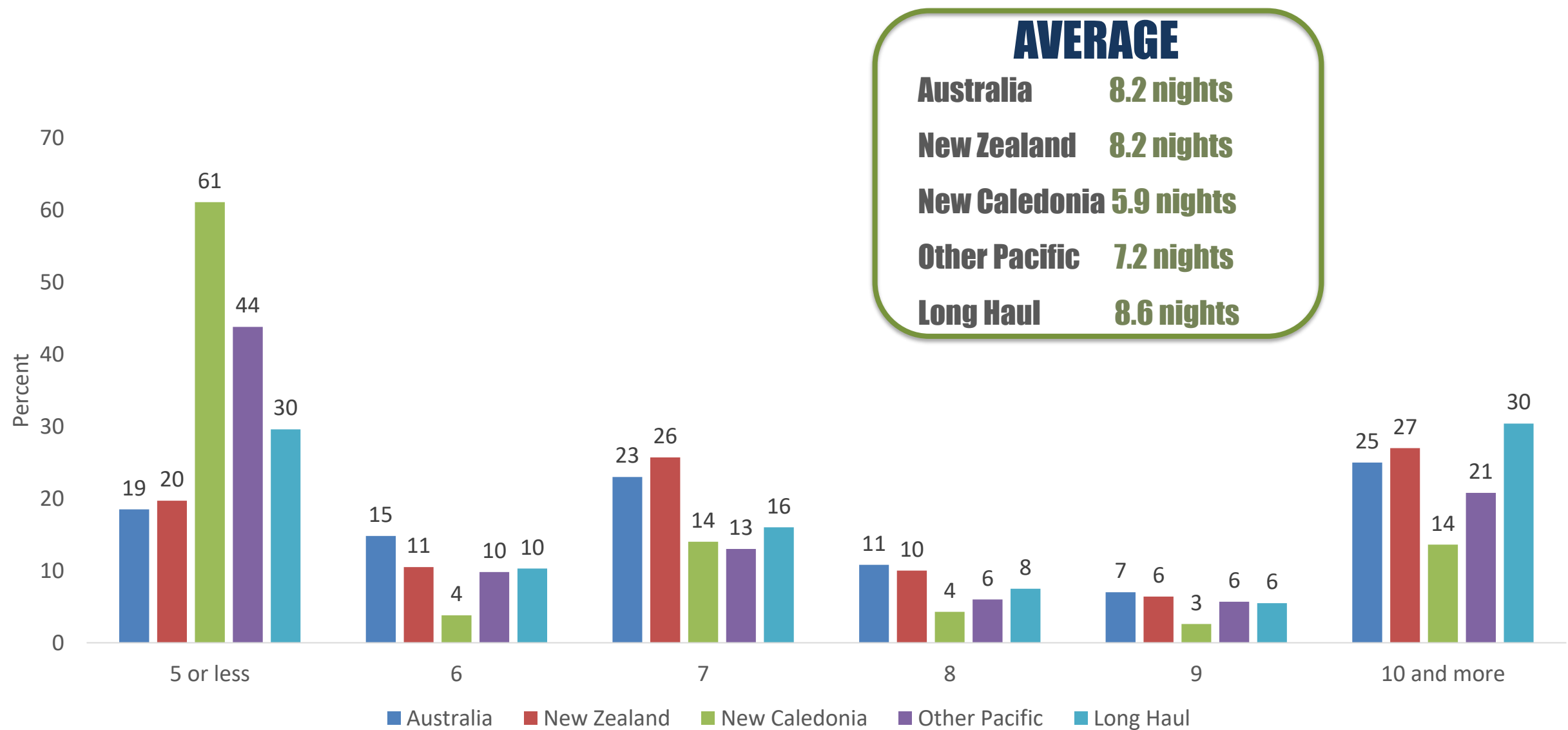
Main purpose of visit



Previous visits



Length of stay (nights)



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

Airlines used for travel – Holiday



Air Vanuatu

61%/63%



10%/10%



8%/4%

Others (Air New Zealand,
Solomon Airlines)

5%/4%



australia

20%/21%



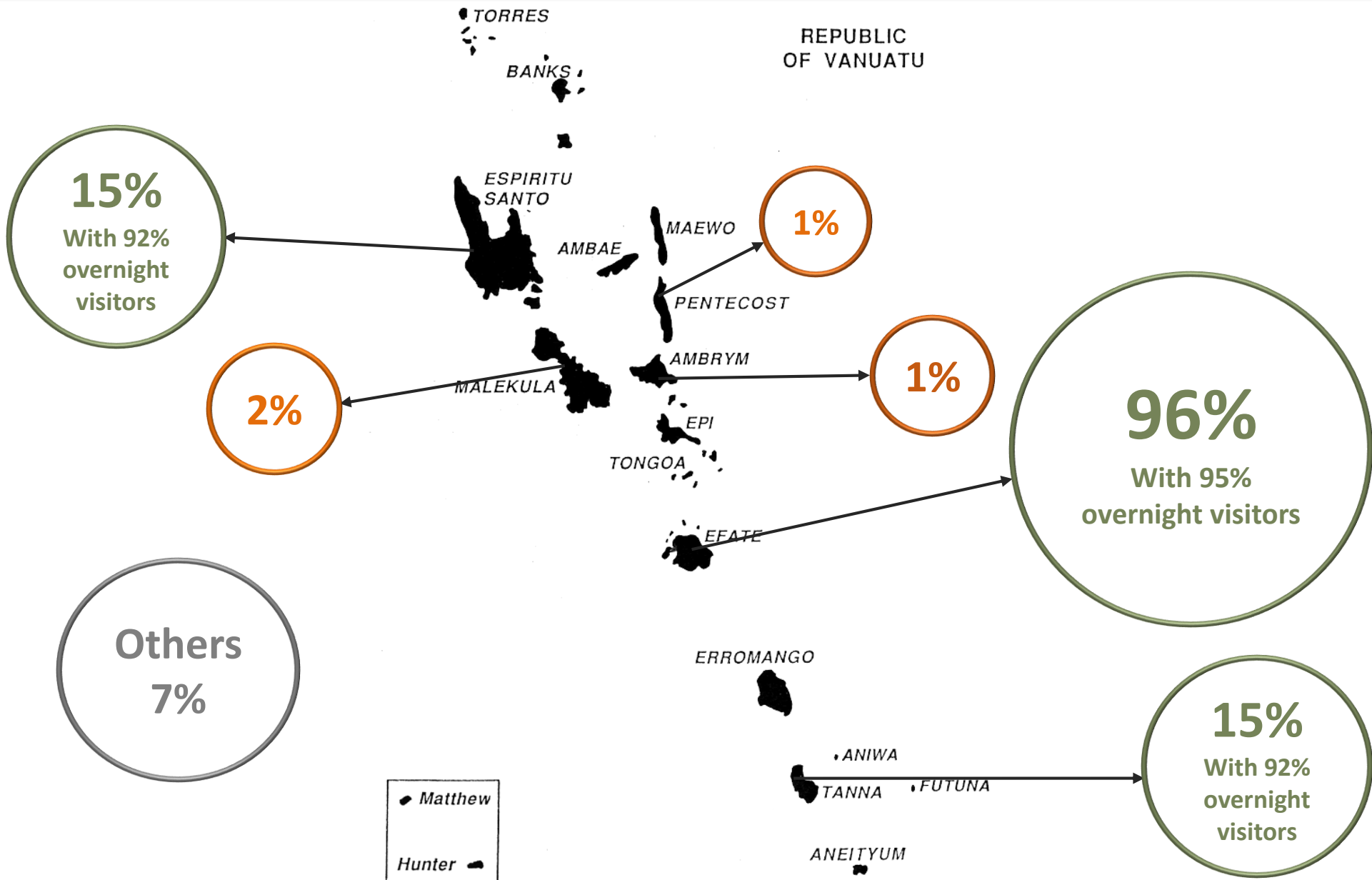
9%/10%



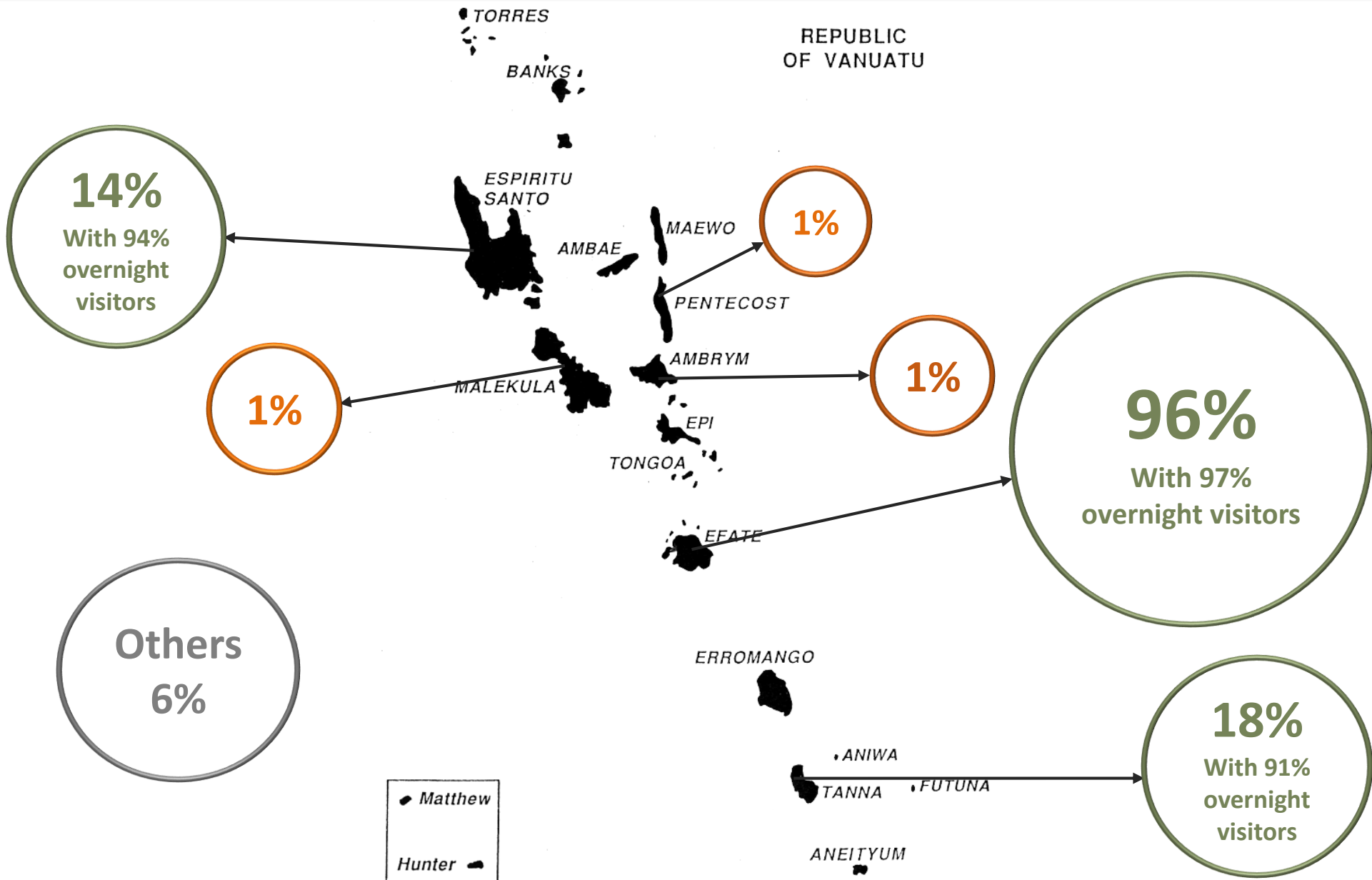
Fiji Airways and
Aircalin are more
commonly used
by visitors from
Pacific countries

* Text in grey represents all visitors/green represents 'holiday' only 27

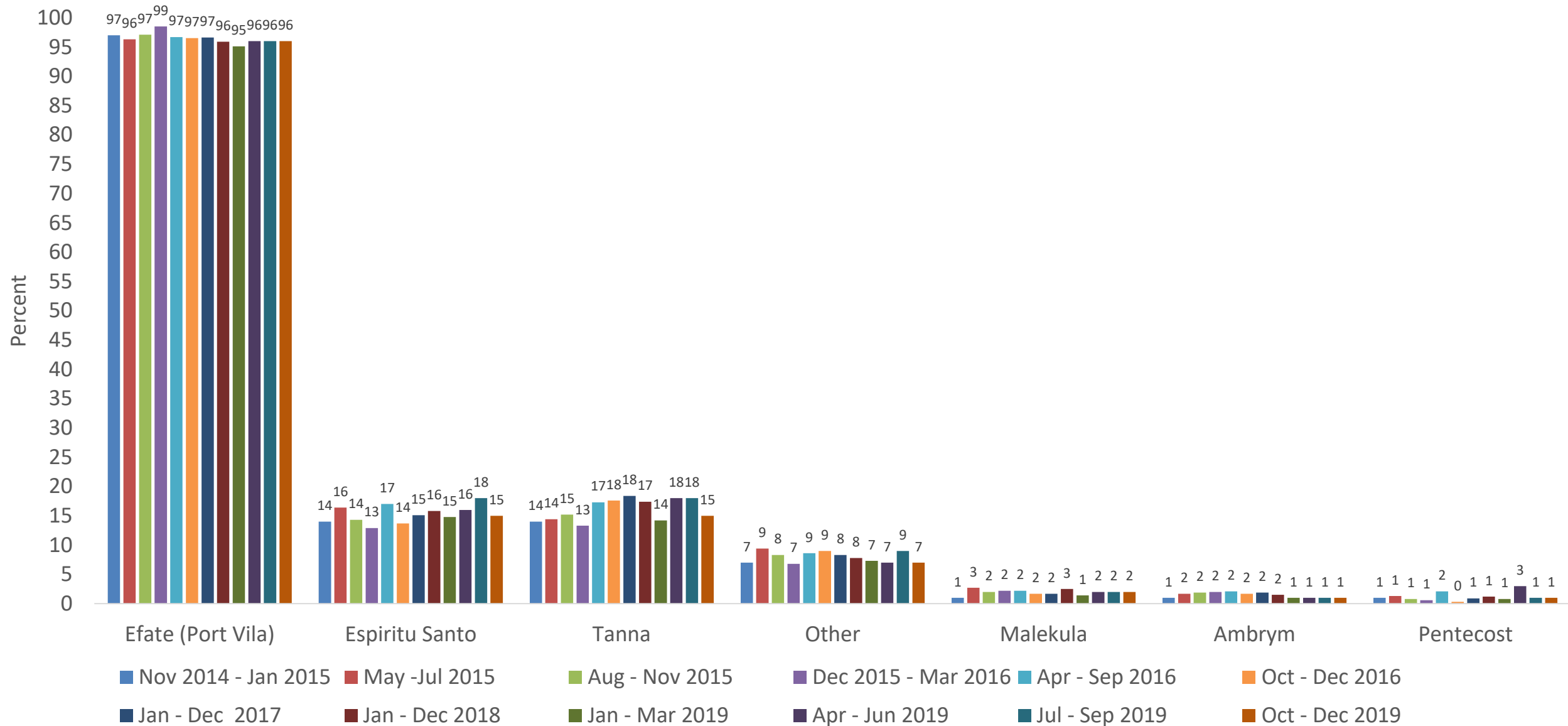
Islands visited



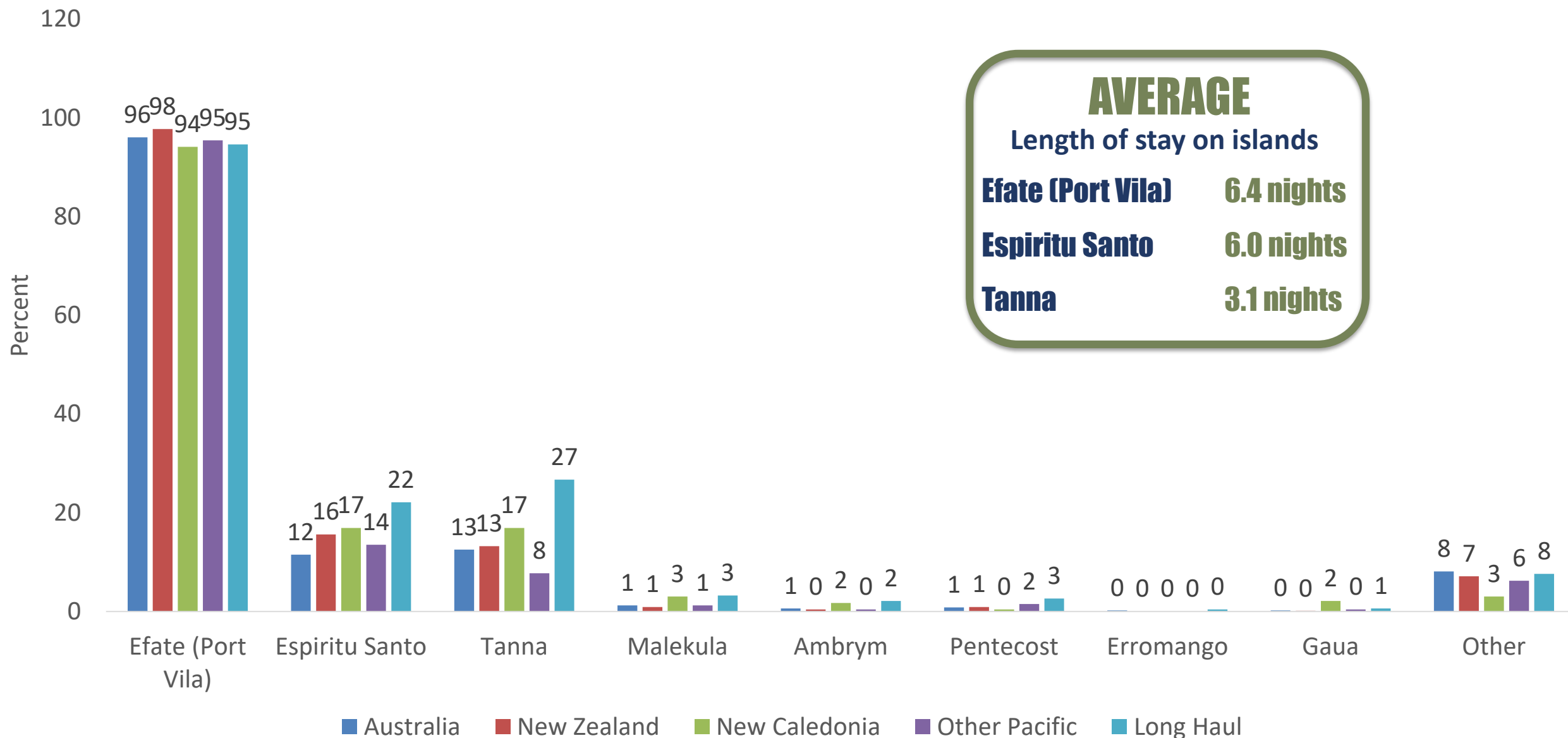
Islands visited - Holiday



Outer islands visited – Time series



Outer islands visited – Country of origin



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

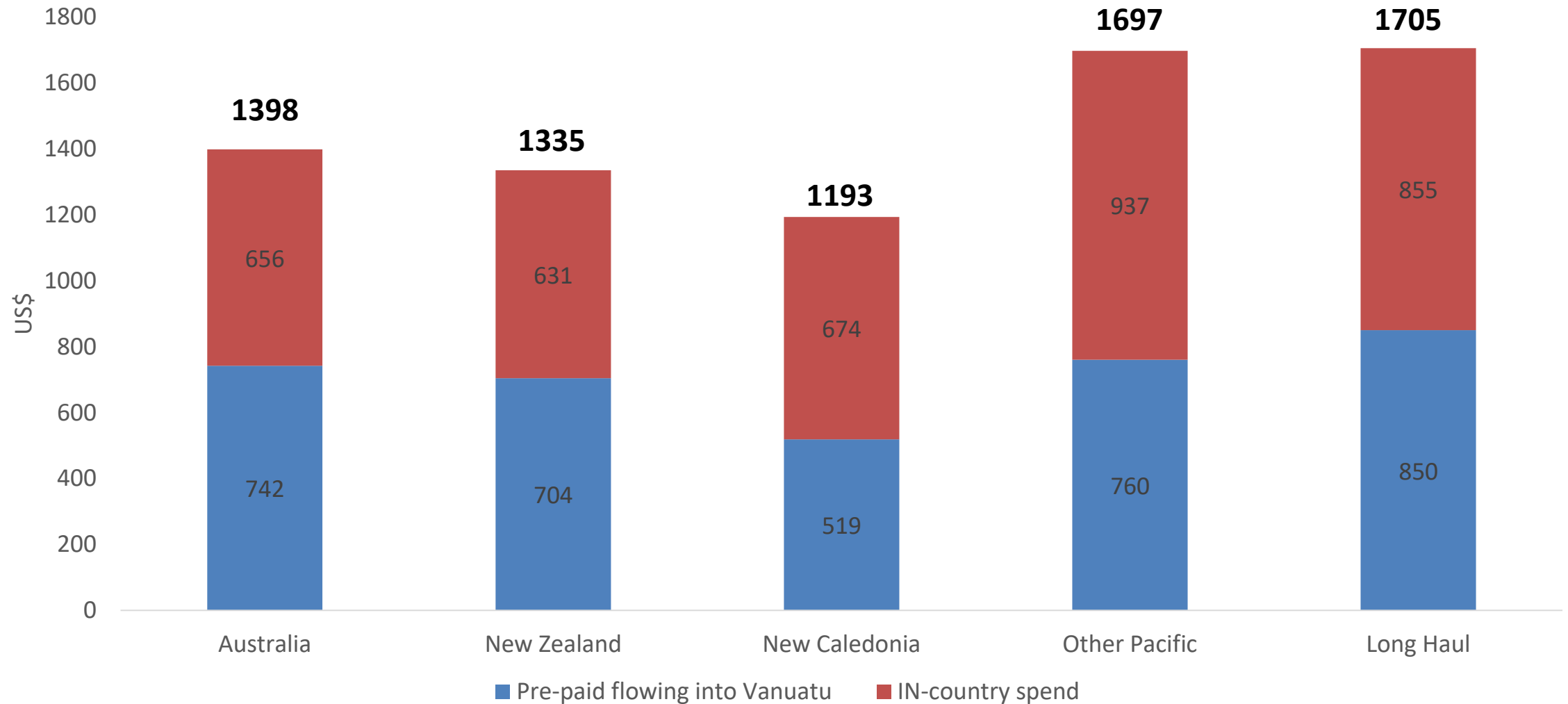
Note: 31+ days as outliers were removed for length of stay analysis

Presentation structure



Expenditure by market

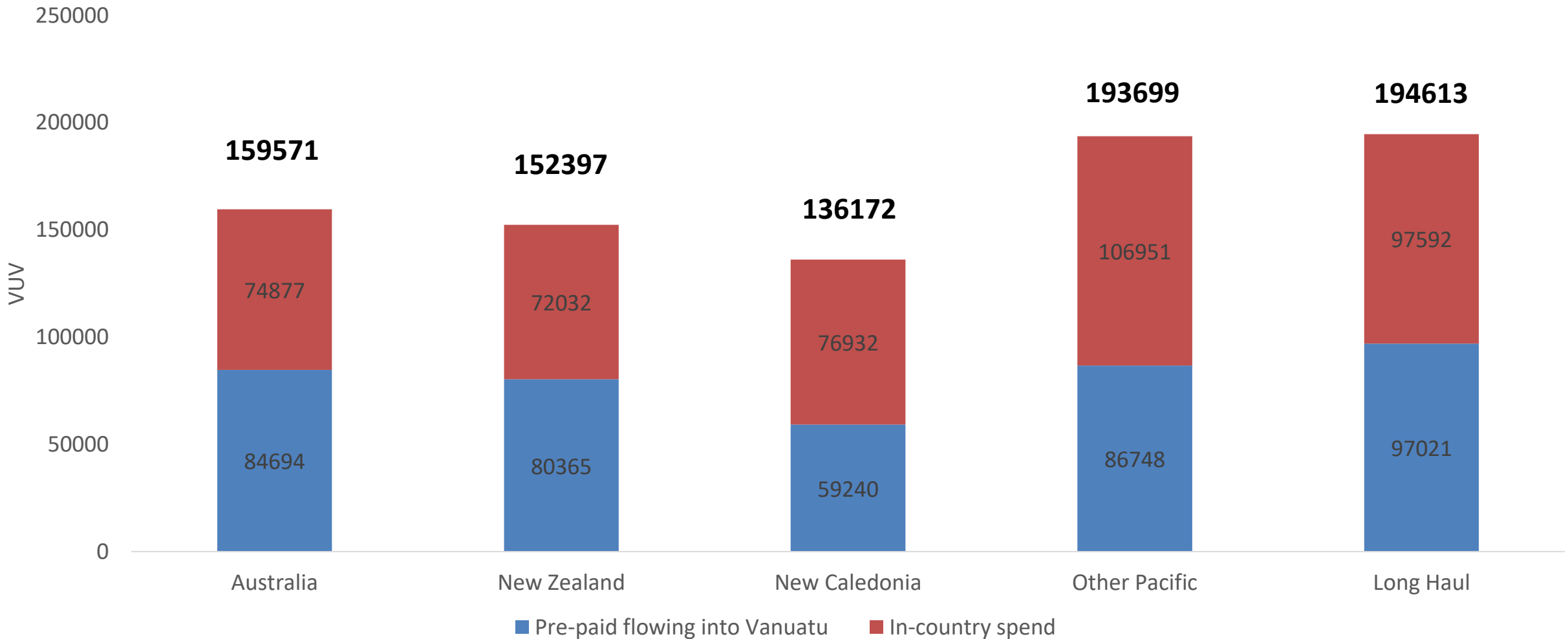
PER PERSON PER VISIT (USD)



Note: the high spend for long haul is driven by the higher length of stay.

Expenditure by market

PER PERSON PER VISIT (VUV)



Note: the high spend for long haul is driven by the higher length of stay.

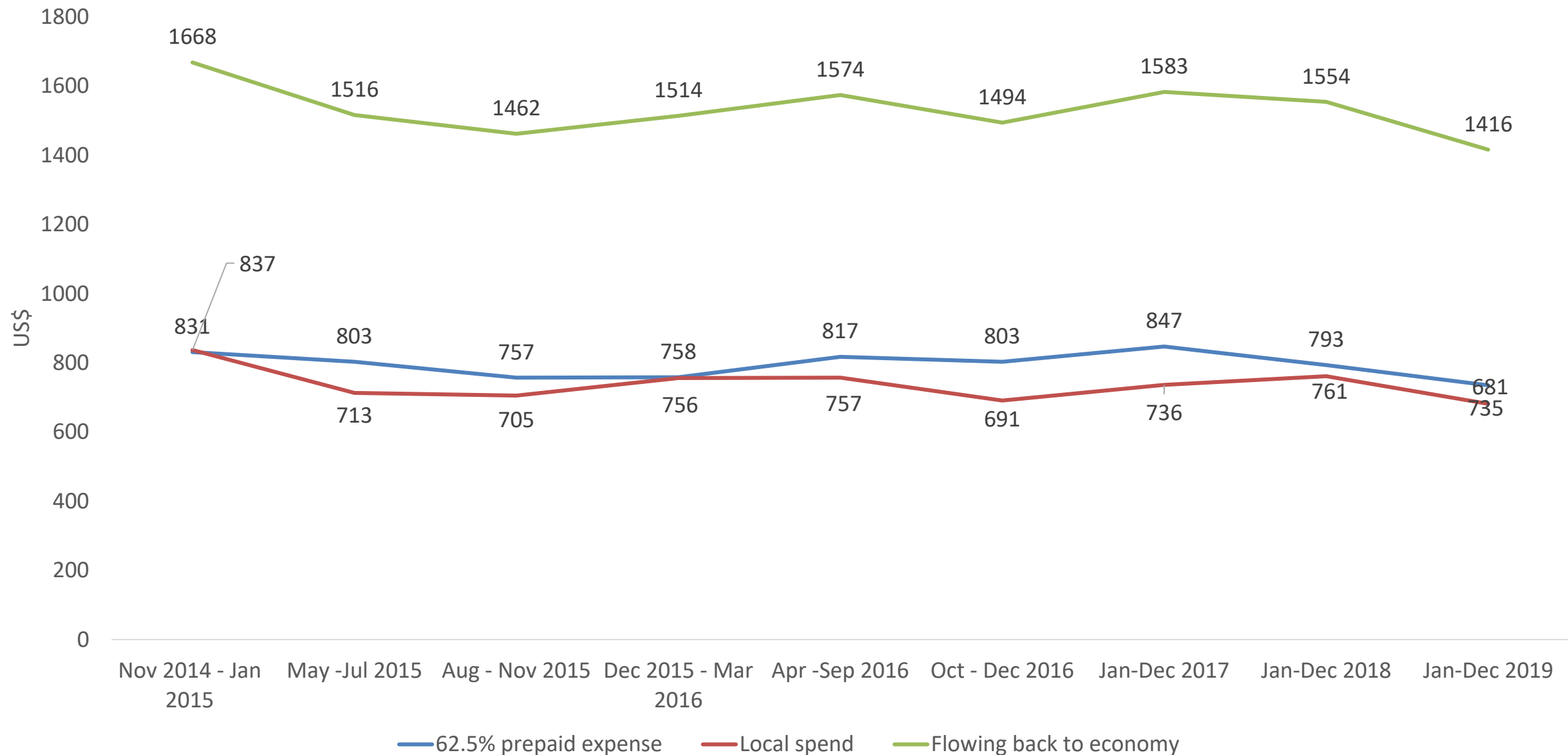
Expenditure by market (USD)

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
Average Spend Prior to arrival						
Per Person - Whole Trip	\$1187	\$1127	\$831	\$1216	\$1361	\$1174
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$742	\$704	\$519	\$760	\$850	\$735
Per Person per Day	\$90	\$86	\$90	\$106	\$99	\$93
Length of stay	8.2 nights	8.2 nights	5.8 nights	7.2 nights	8.6 nights	7.9 nights
Average Spend while in Vanuatu						
Per Person - Whole Trip	\$656	\$631	\$674	\$937	\$855	\$681
Per Person per Day	\$80	\$77	\$116	\$130	\$100	\$86
Total spend flowing into Vanuatu economy – Whole Trip	\$1398	\$1336	\$1193	\$1697	\$1705	\$1416
Total spend flowing into Vanuatu economy – Per Day	\$170	\$163	\$206	\$236	\$199	\$179

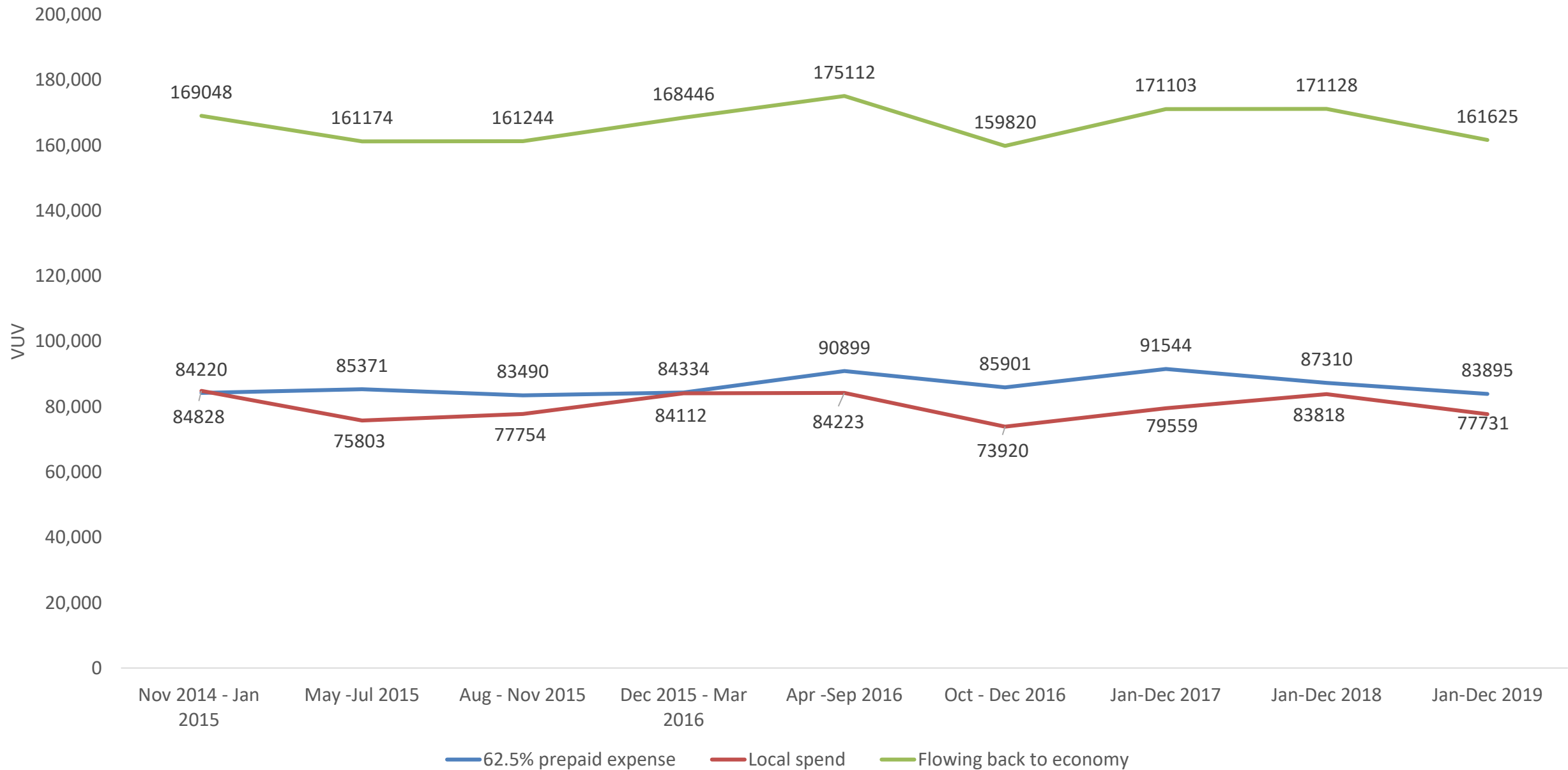
Expenditure by market (VUV)

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
Average Spend Prior to arrival						
Per Person - Whole Trip	135487	128638	94852	138797	155348	134003
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	84694	80356	59240	86748	97021	83895
Per Person per Day	10273	9816	10273	12099	11300	10615
Length of stay	8.2 nights	8.2 nights	5.8 nights	7.2 nights	8.6 nights	7.9 nights
Average Spend while in Vanuatu						
Per Person - Whole Trip	74877	72024	76932	106951	97592	77731
Per Person per Day	9131	8789	13240	14838	11414	9816
Total spend flowing into Vanuatu economy – Whole Trip	159571	152494	136172	193699	194612	161625
Total spend flowing into Vanuatu economy – Per Day	19404	18605	23513	26938	22714	20431

Overall visitor spend time series trends (USD)

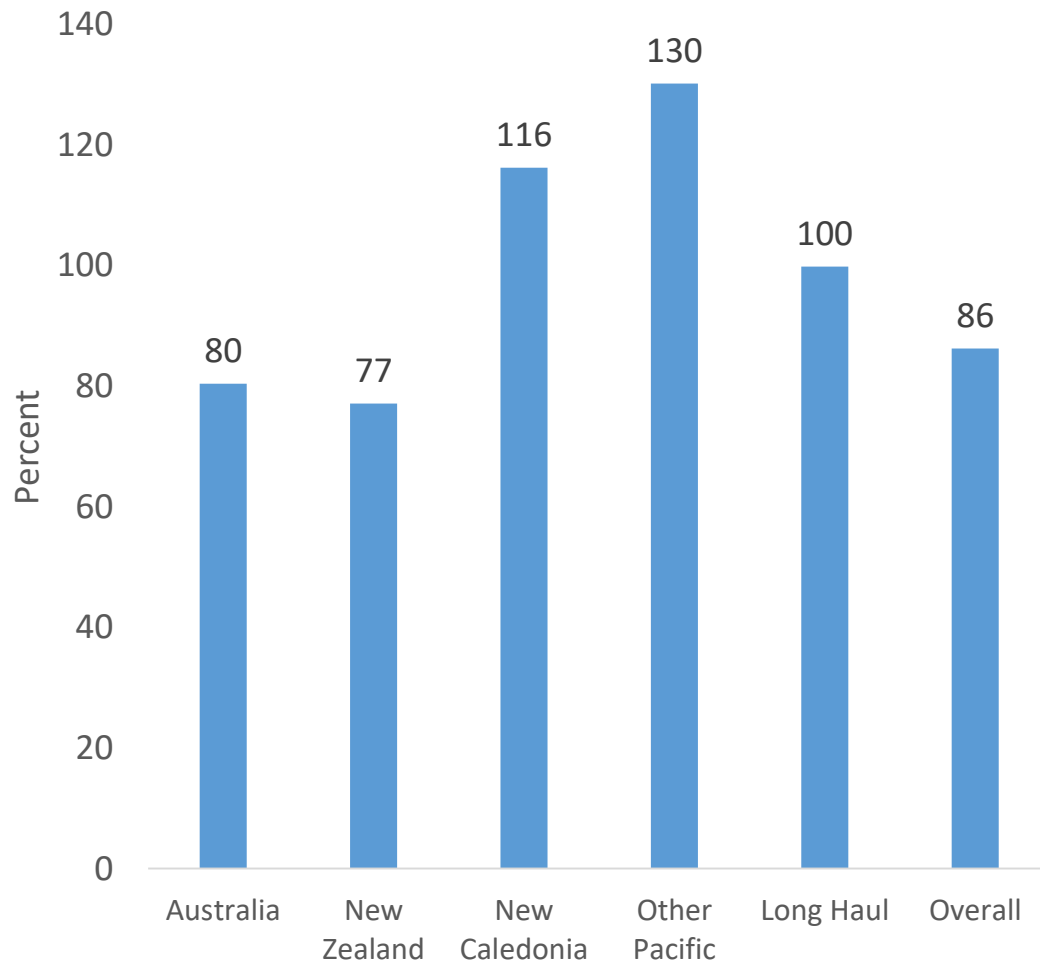


Overall visitor spend time series trends (VUV)

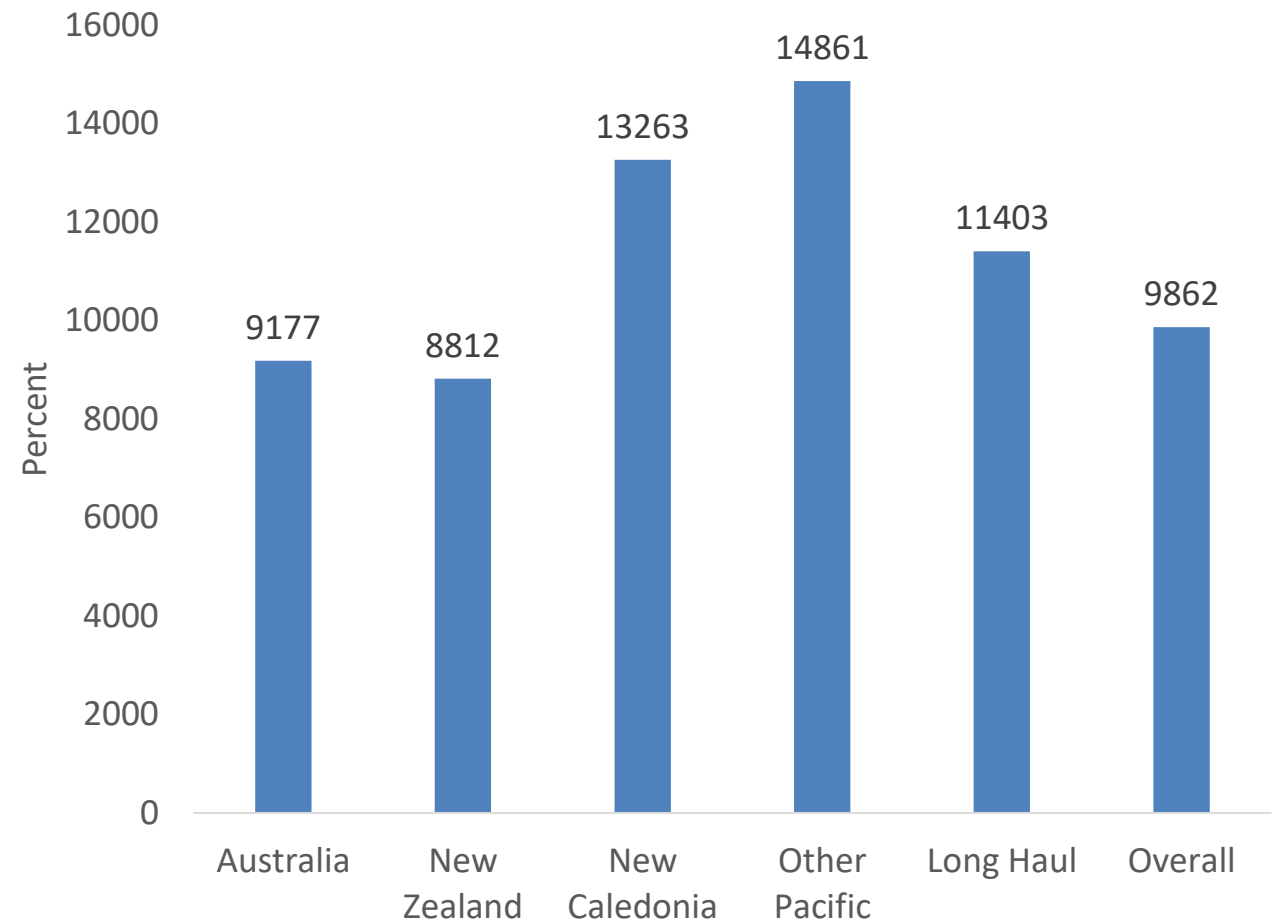


Average spend while in Vanuatu per day

USD

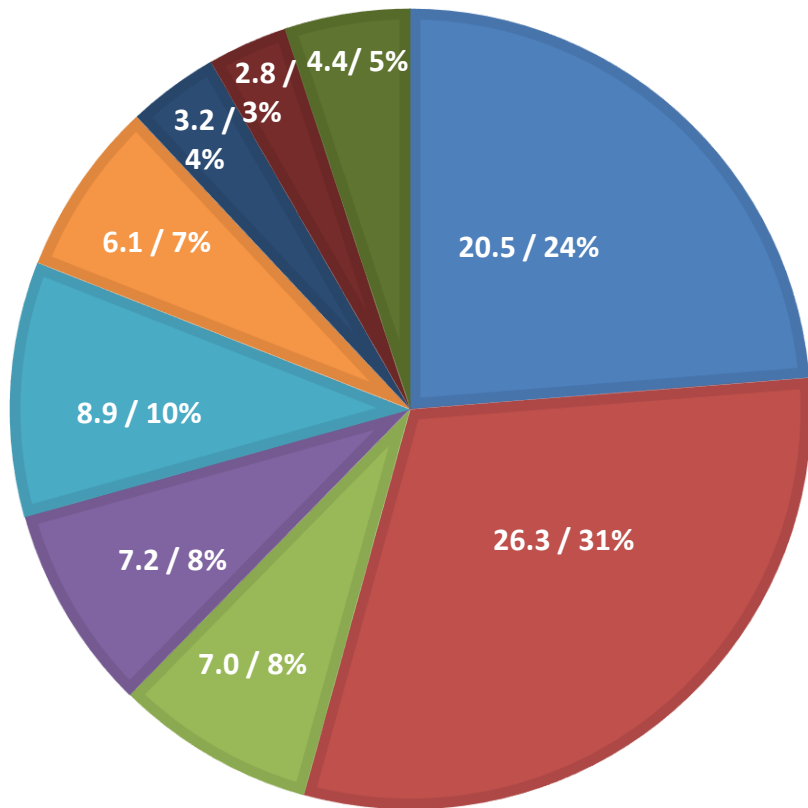


VUV

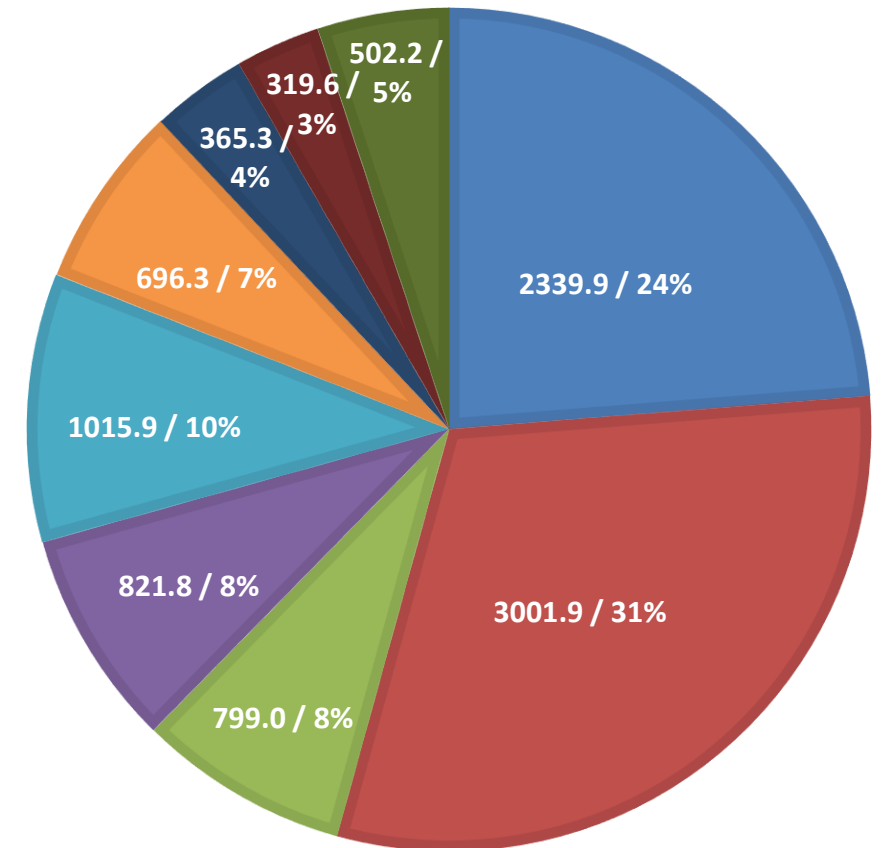


Average daily spend in Vanuatu - Overall

USD 86 / 100%



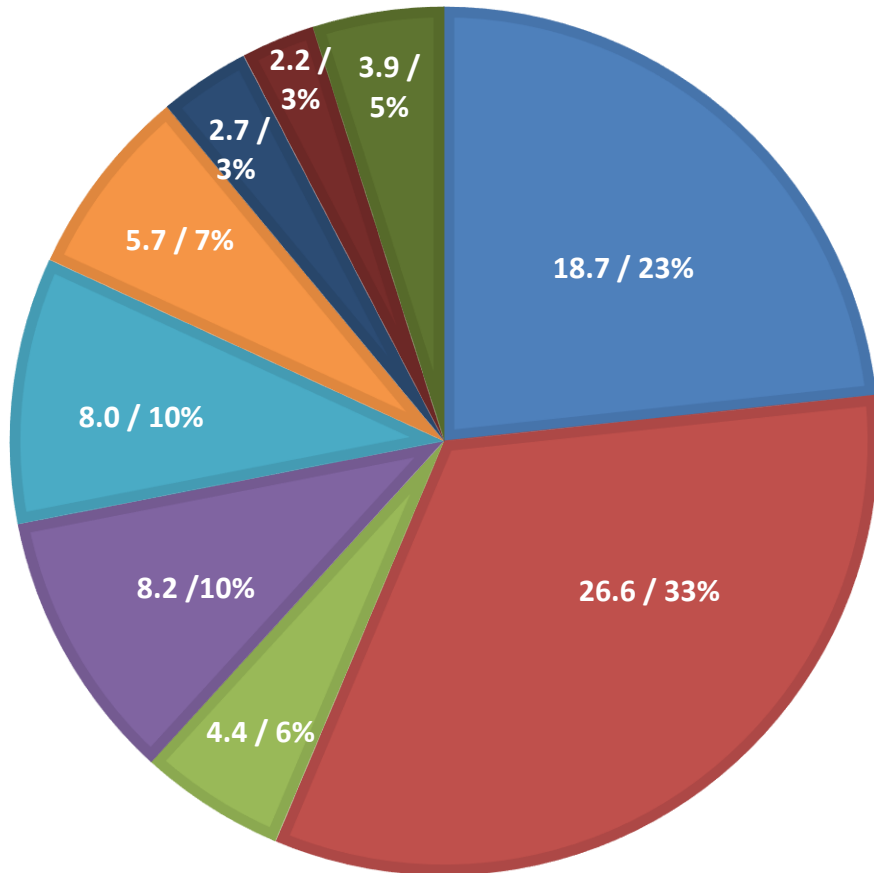
VUV 9862 / 100%



- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

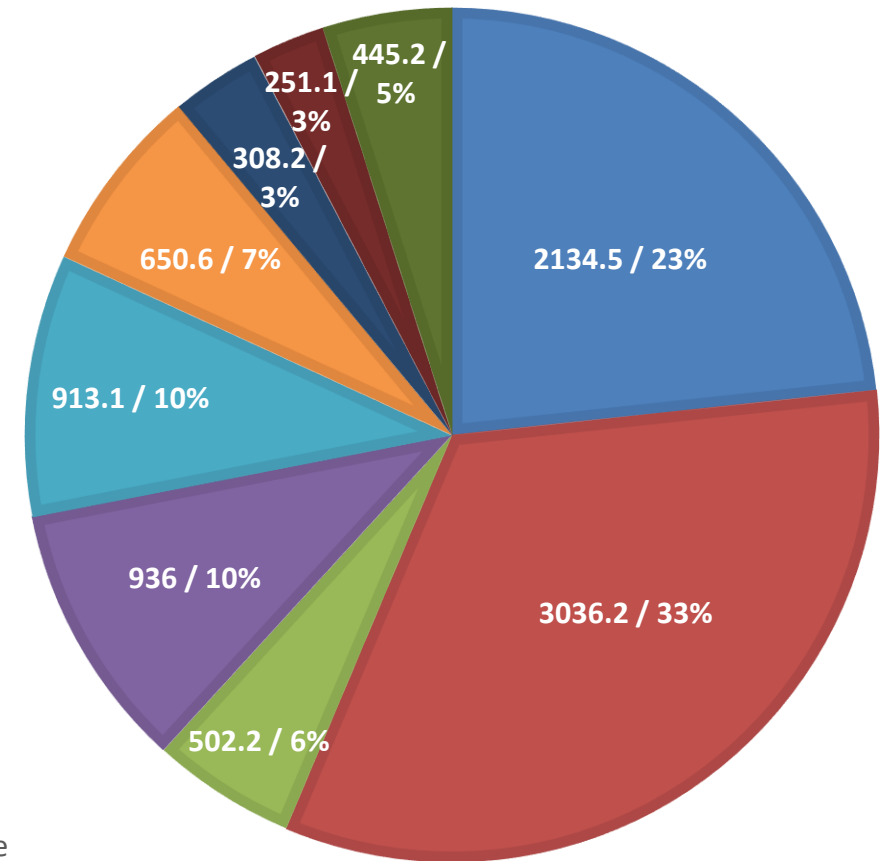
Average daily spend in Vanuatu - Australia

USD 80 / 100%



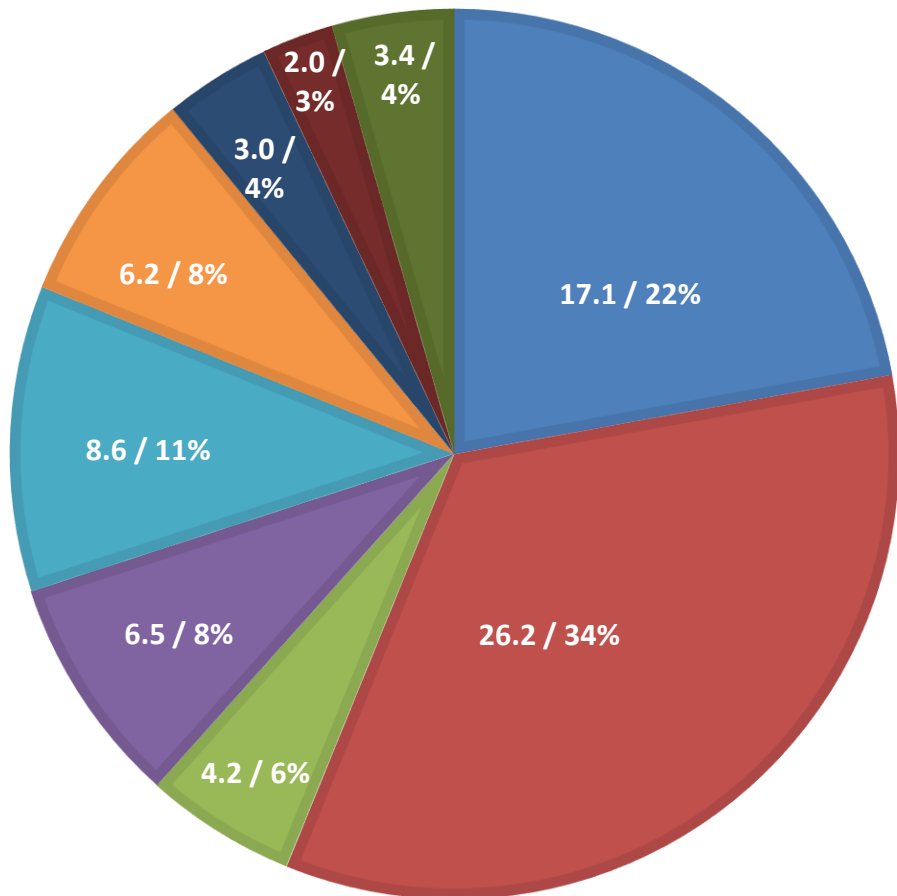
VUV 9177 / 100%

- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

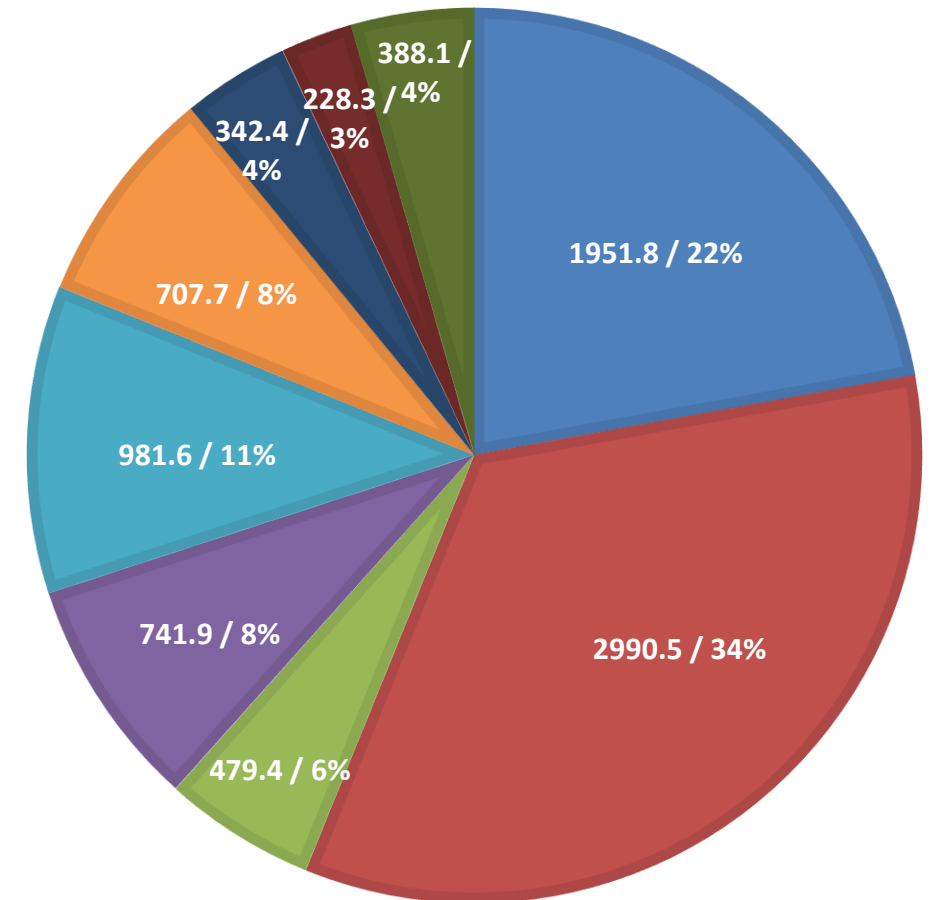


Average daily spend in Vanuatu – New Zealand

USD 77 / 100%



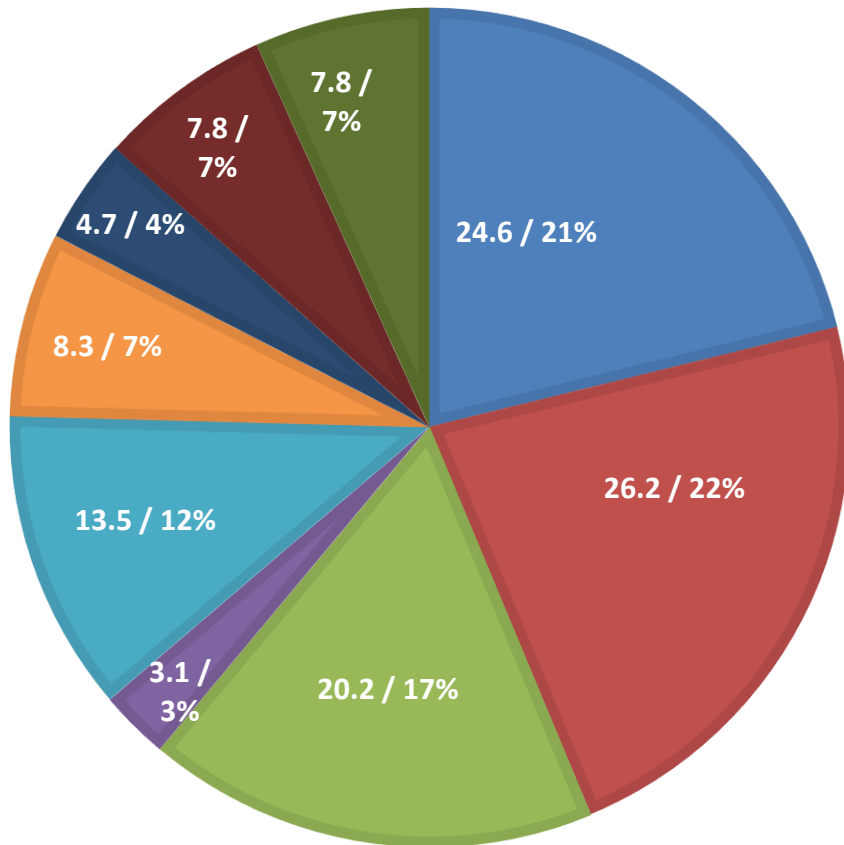
VUV 8812 / 100%



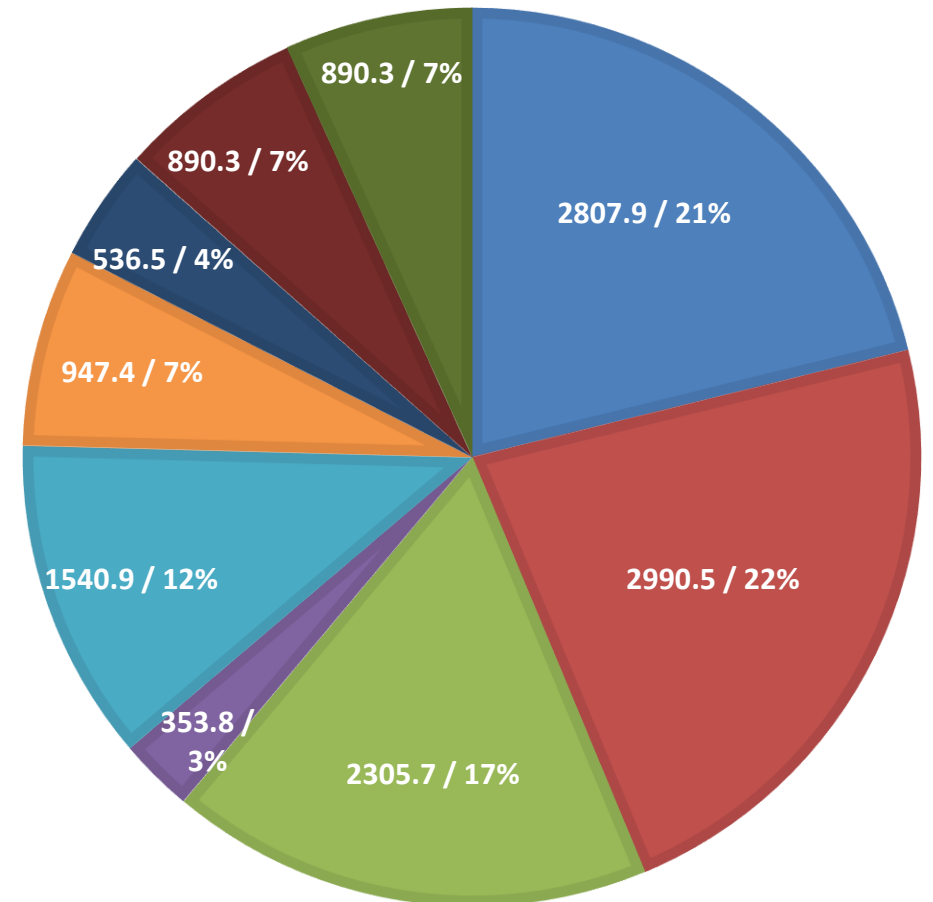
- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

Average daily spend in Vanuatu – New Caledonia

USD 116 / 100%



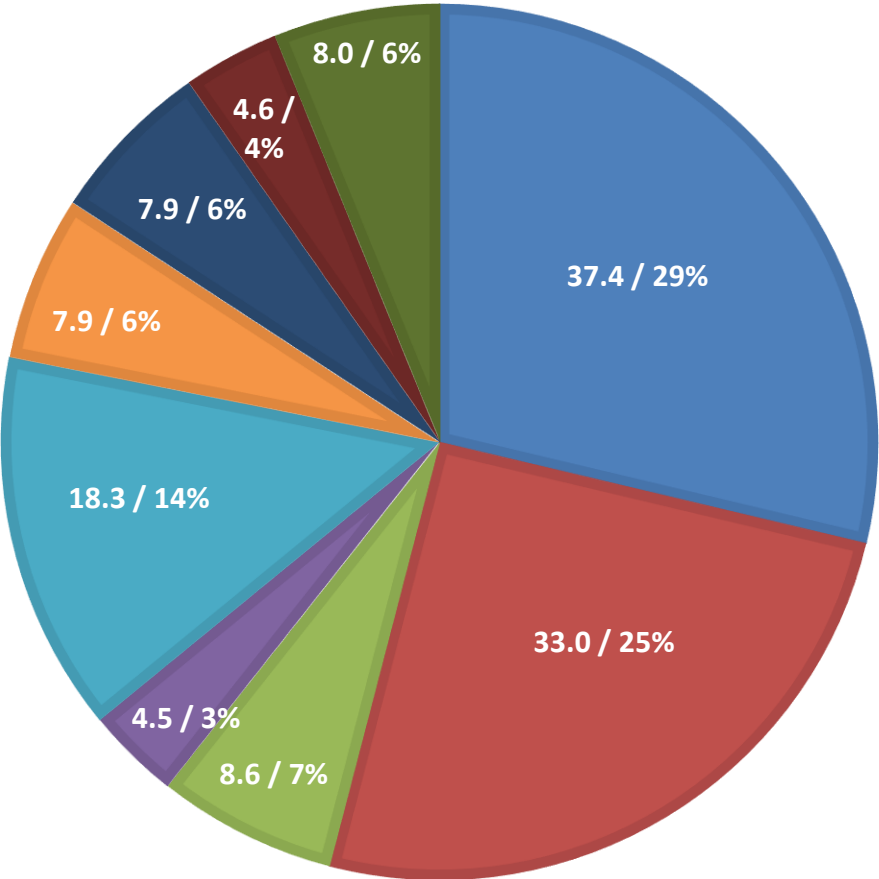
VUV 13263 / 100%



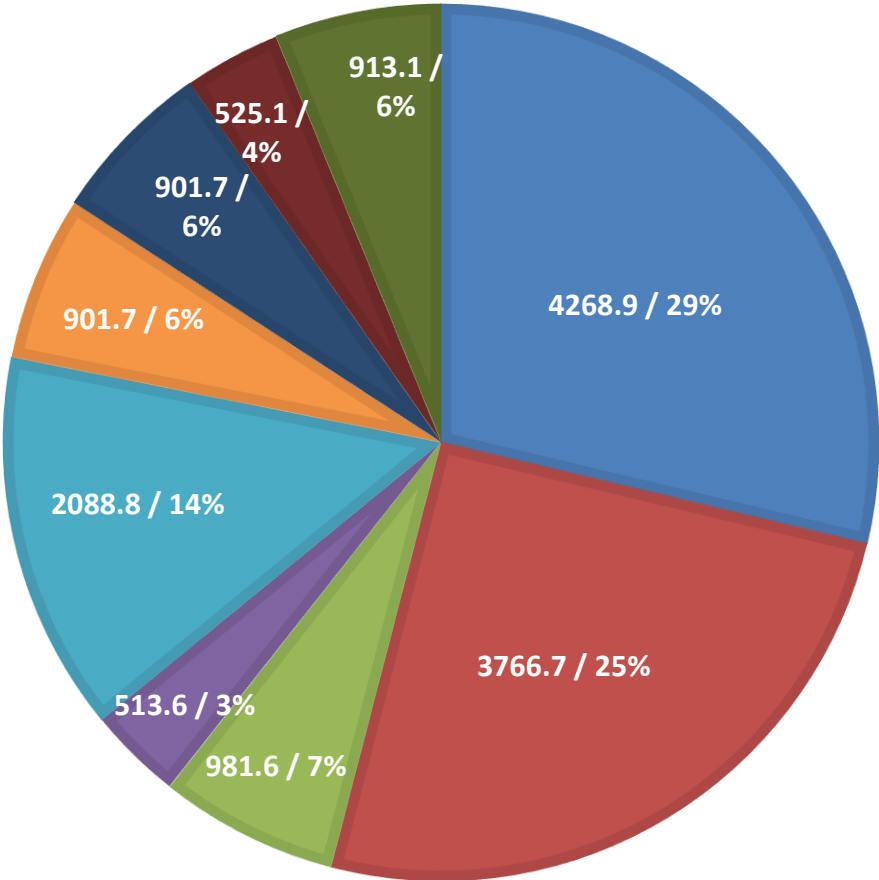
- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

Average daily spend in Vanuatu – Other Pacific

USD 130 / 100%



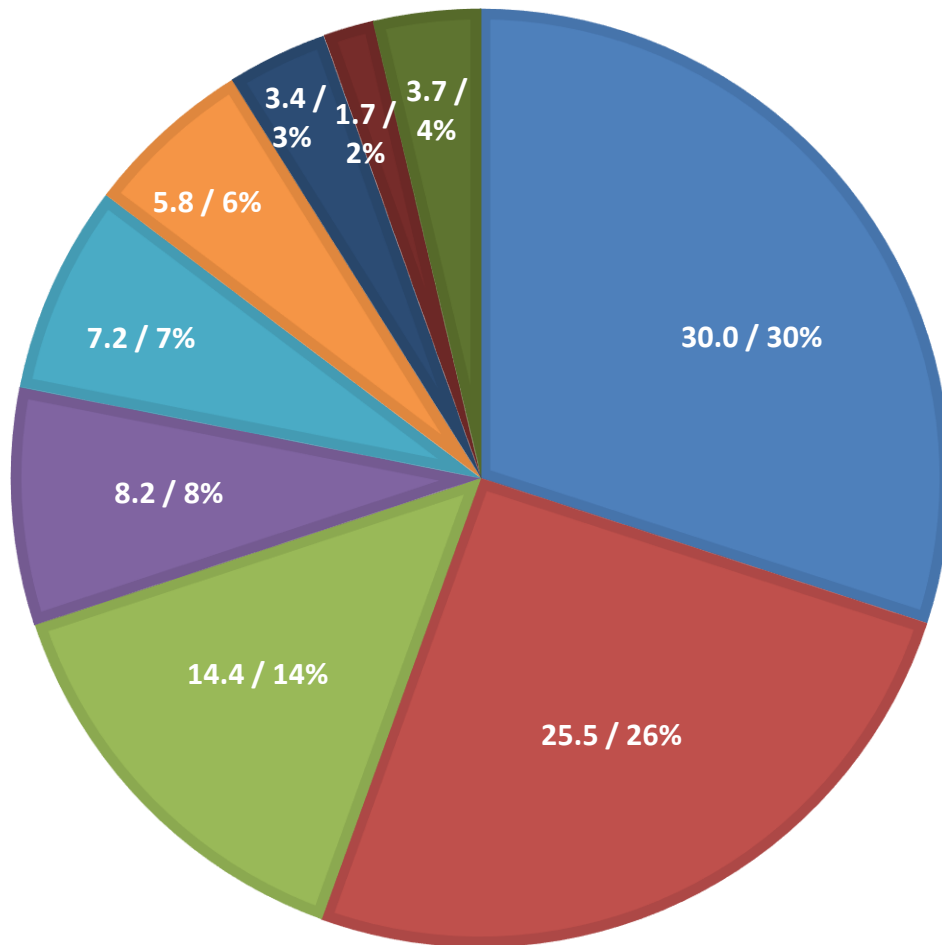
VUV 14861 / 100%



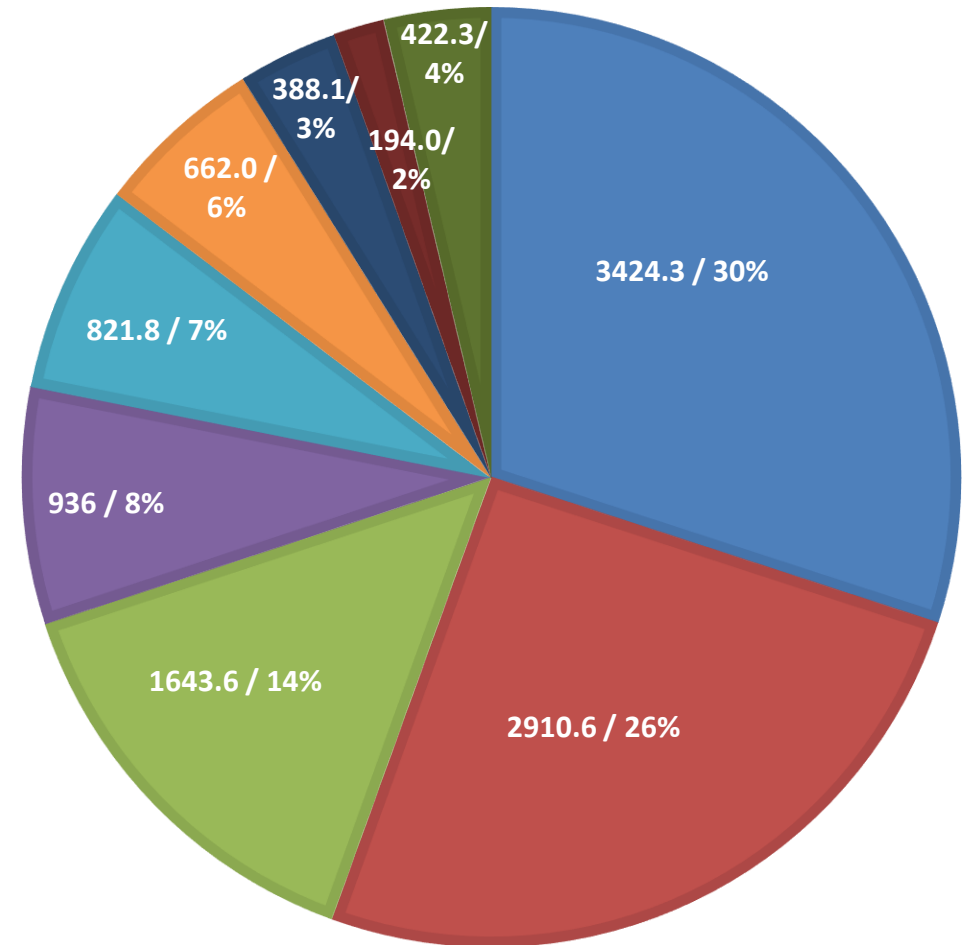
- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

Average daily spend in Vanuatu – Long Haul

USD 100 / 100%



VUV 11403 / 100%



- Accommodation
- Food & Beverage
- Domestic Travel
- Tours
- Retail
- Local Transport
- Souvenirs
- Duty Free
- Entertainment, Internet & Service

Visitor expenditure – Per person and total

	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$93 Vt 10606		US\$86 Vt 9846		US\$179 Vt 20452
Whole Trip	US\$734 Vt 83787		US\$681 Vt 77782		US\$1416 Vt 161569

Direct economic impact on Vanuatu for Jan-Dec 2019

US\$170.7 million / Vt 19.5 billion in total

US\$14.2 million/ Vt 1.63 billion per month

Presentation structure



Information sources and decision making

How did you find out about Vanuatu?



40%	Friends and family
34%	Previous visits
19%	Google

What influenced your decision making?



3.7/5 Experience a different culture



3.6/5 Range of natural attractions



3.6/5 Beaches and swimming

How did you purchase your travel?



35%	Direct with airlines and/ or accommodation places
27%	Through a travel booking website
25%	Through a travel agent store
12%	Travel arrangements were made by others
2%	Other



Importance of information Sources for Planning

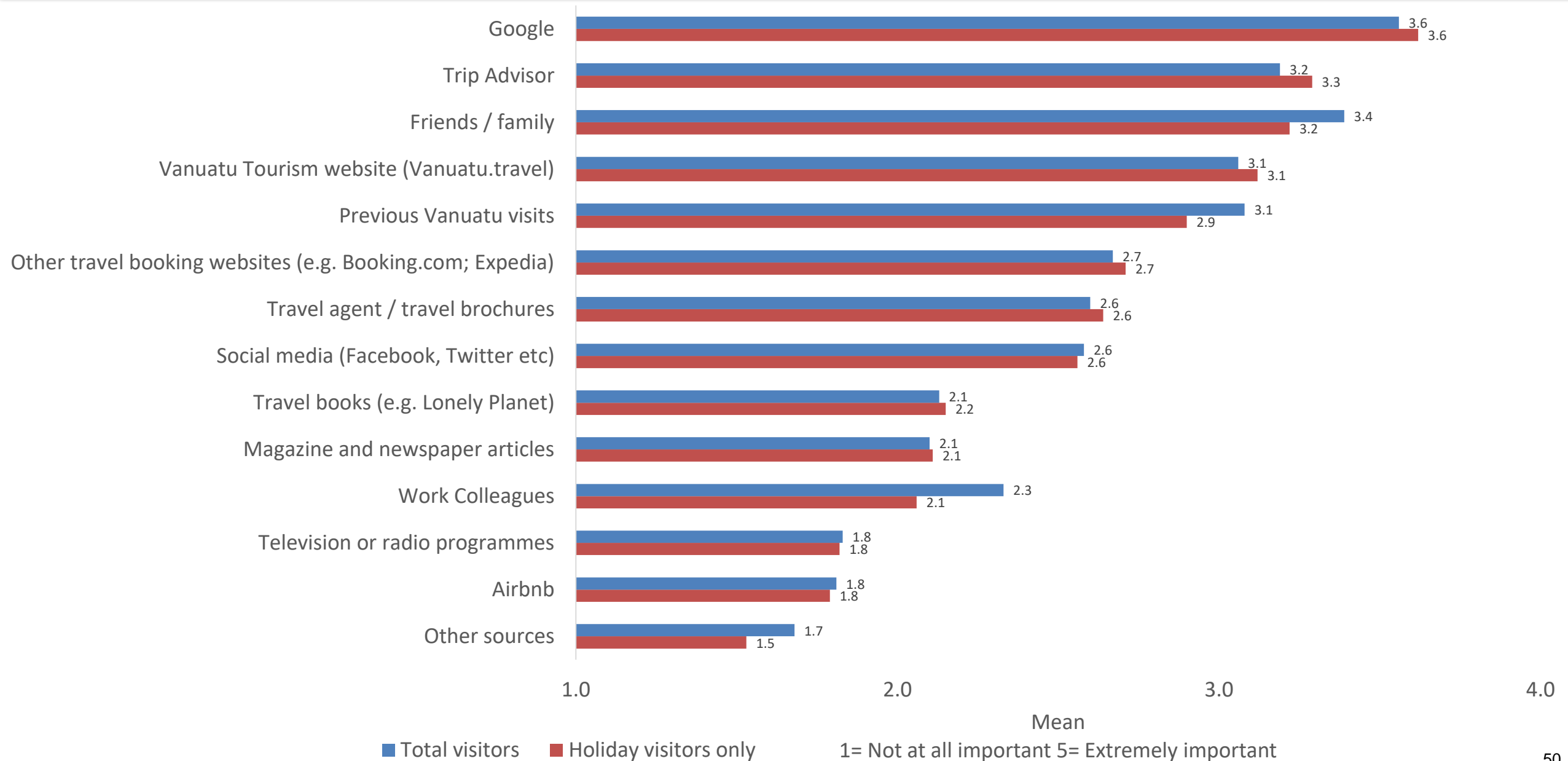
3.6/5	Google
3.4/5	Friends and family
3.2/5	Trip Advisor
3.1/5	Previous visits

Mean: 1 – not at all important to 5 – extremely important⁴⁸

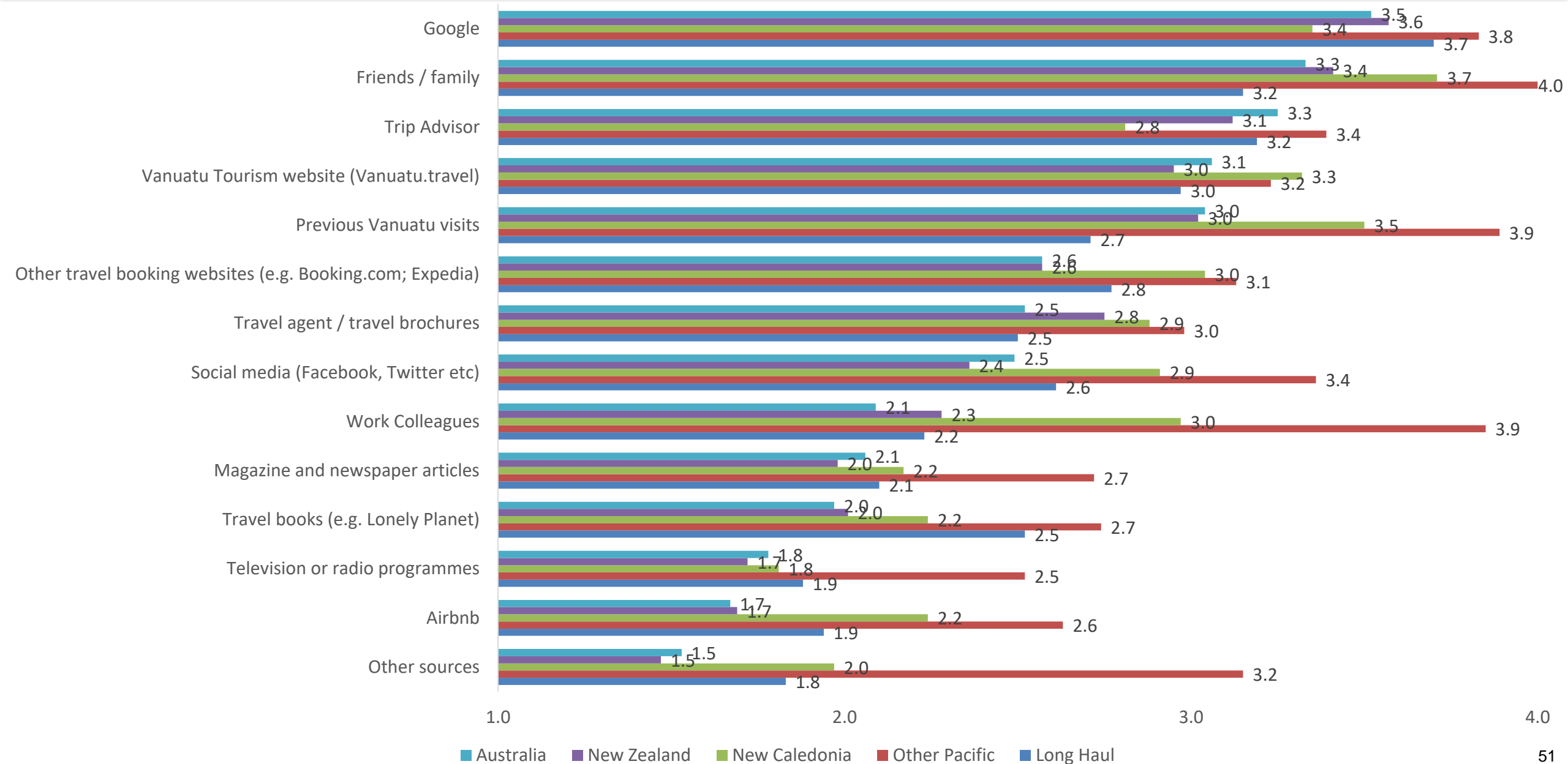
Influences on the decision to choose Vanuatu

Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Experience of a different culture 3.8	Beaches and swimming 3.7	Range of natural activities 3.7	Range of outdoor activities and experiences 3.5
New Zealand	Experience of a different culture 3.6	Beaches and swimming 3.6	Range of natural activities 3.4	Snorkelling 3.4
New Caledonia	Affordable 3.9	Experience of a different culture 3.6	Range of natural activities 3.5	Proximity / Ease of travel 3.5
Other Pacific	Business or conference 3.7	Experience of a different culture 3.5	Proximity / Ease of travel 3.5	Range of natural activities 3.4
Long Haul	Experience of a different culture 3.8	Range of natural attractions 3.6	Beaches and swimming 3.5	Range of outdoor activities and experiences 3.2

Importance of sources used for planning – Holiday



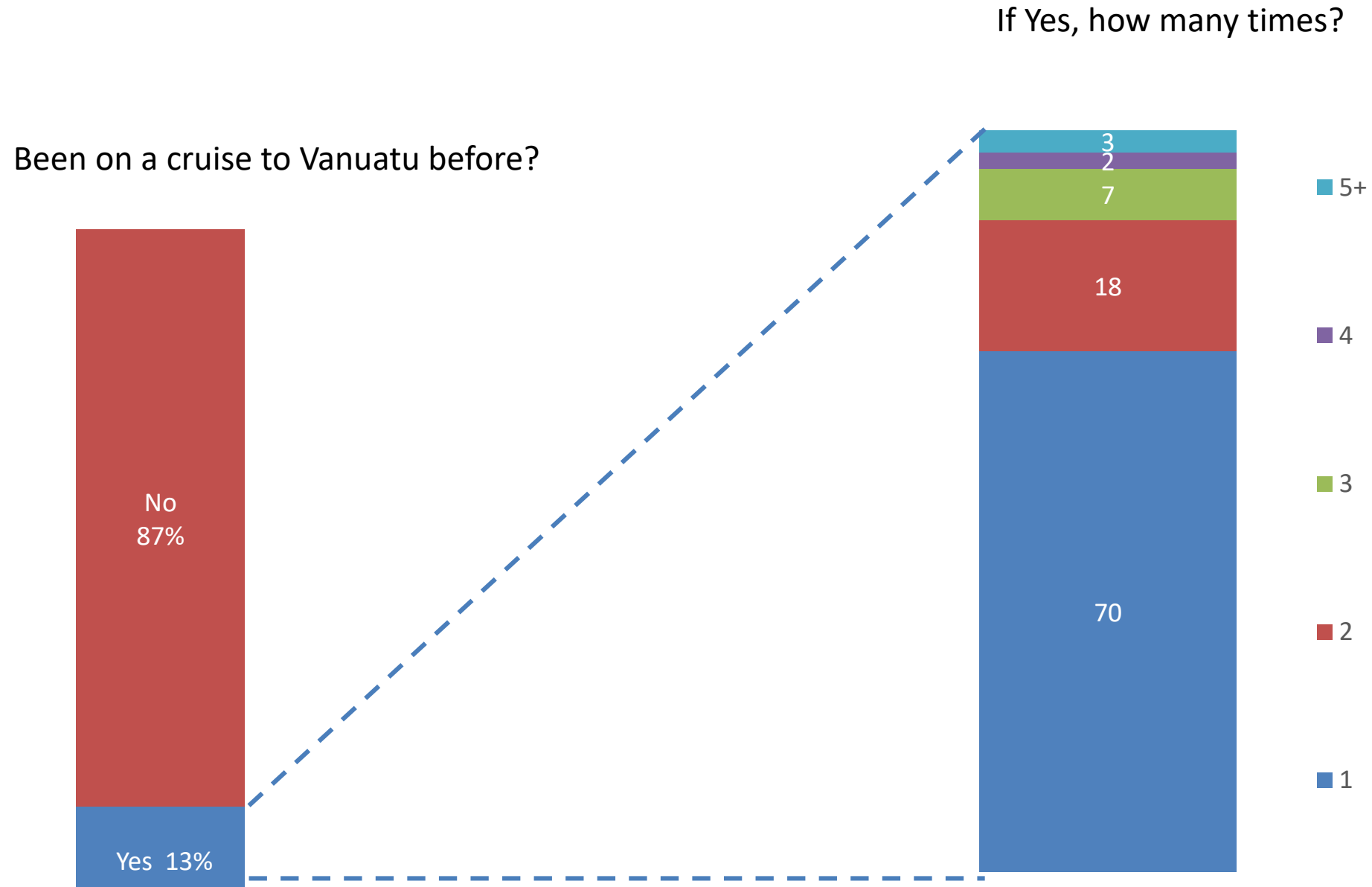
Importance of sources used for planning – Market



Travel purchasing behaviour by market



Cruise visits to Vanuatu for holiday visitors only



Presentation structure



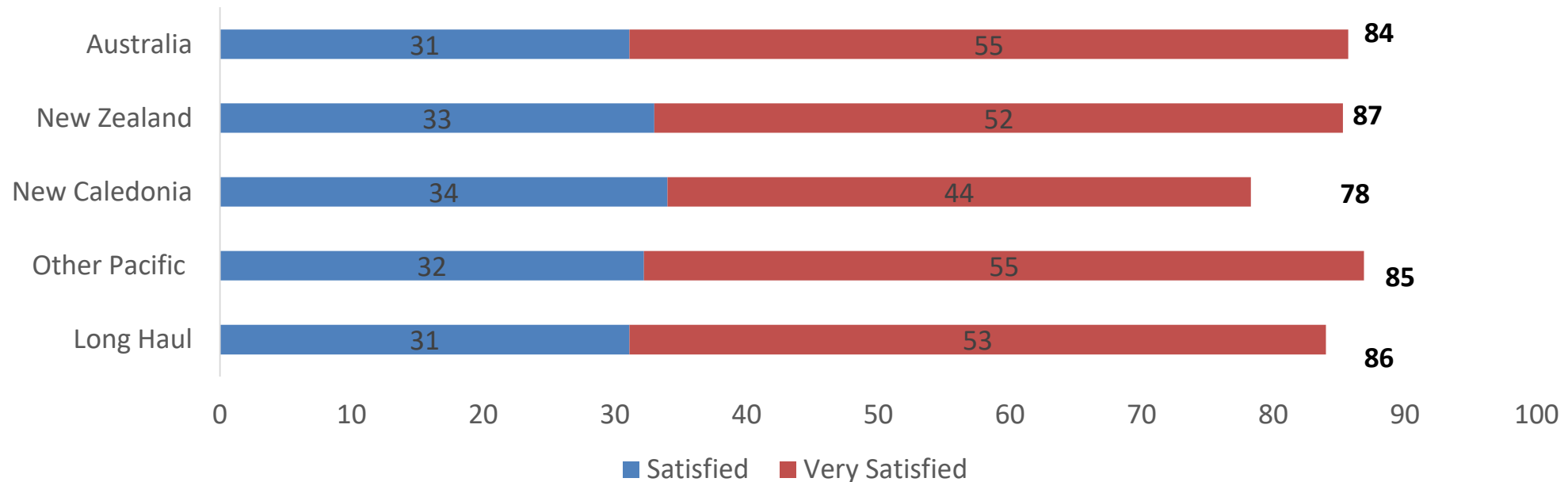
Visitor satisfaction

Overall Satisfaction*

85% Total visitors satisfied

84% Holiday visitors satisfied

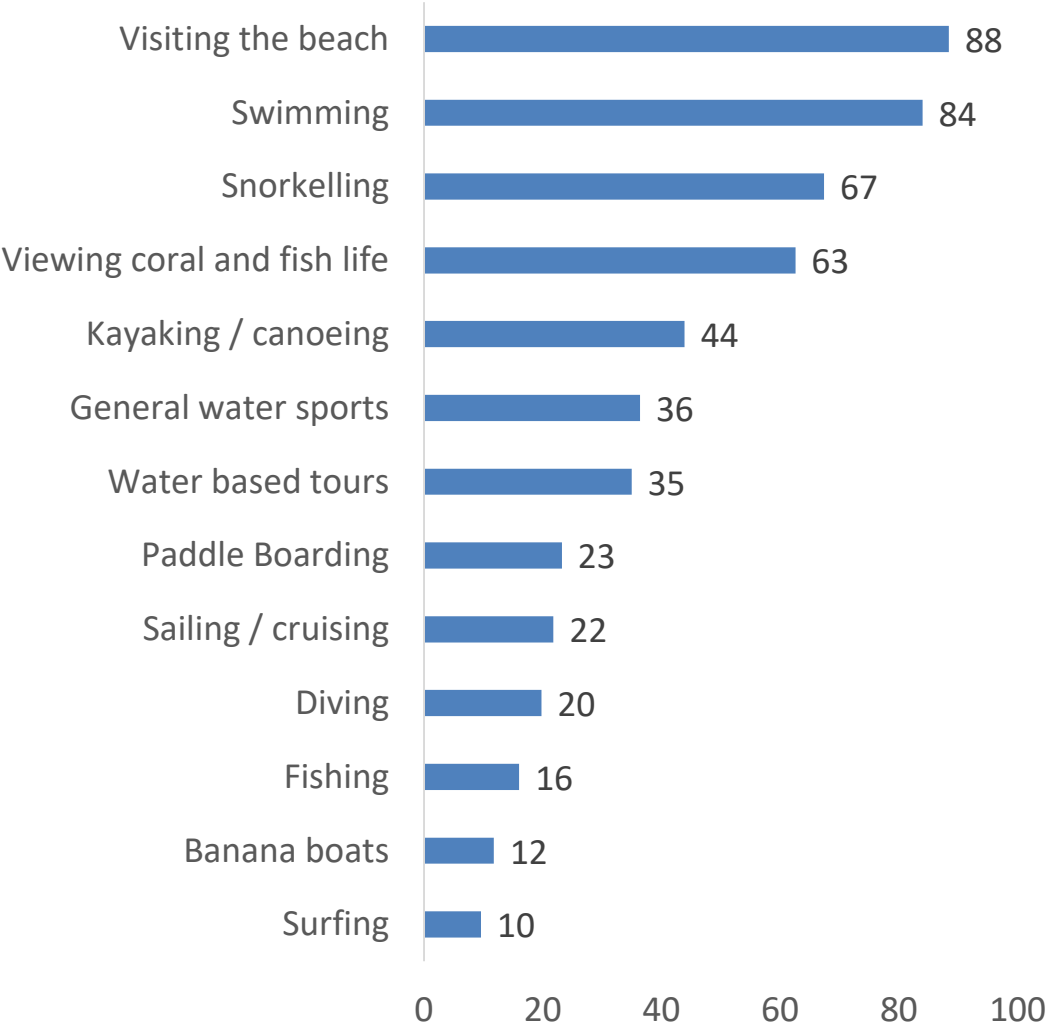
Satisfaction by Market



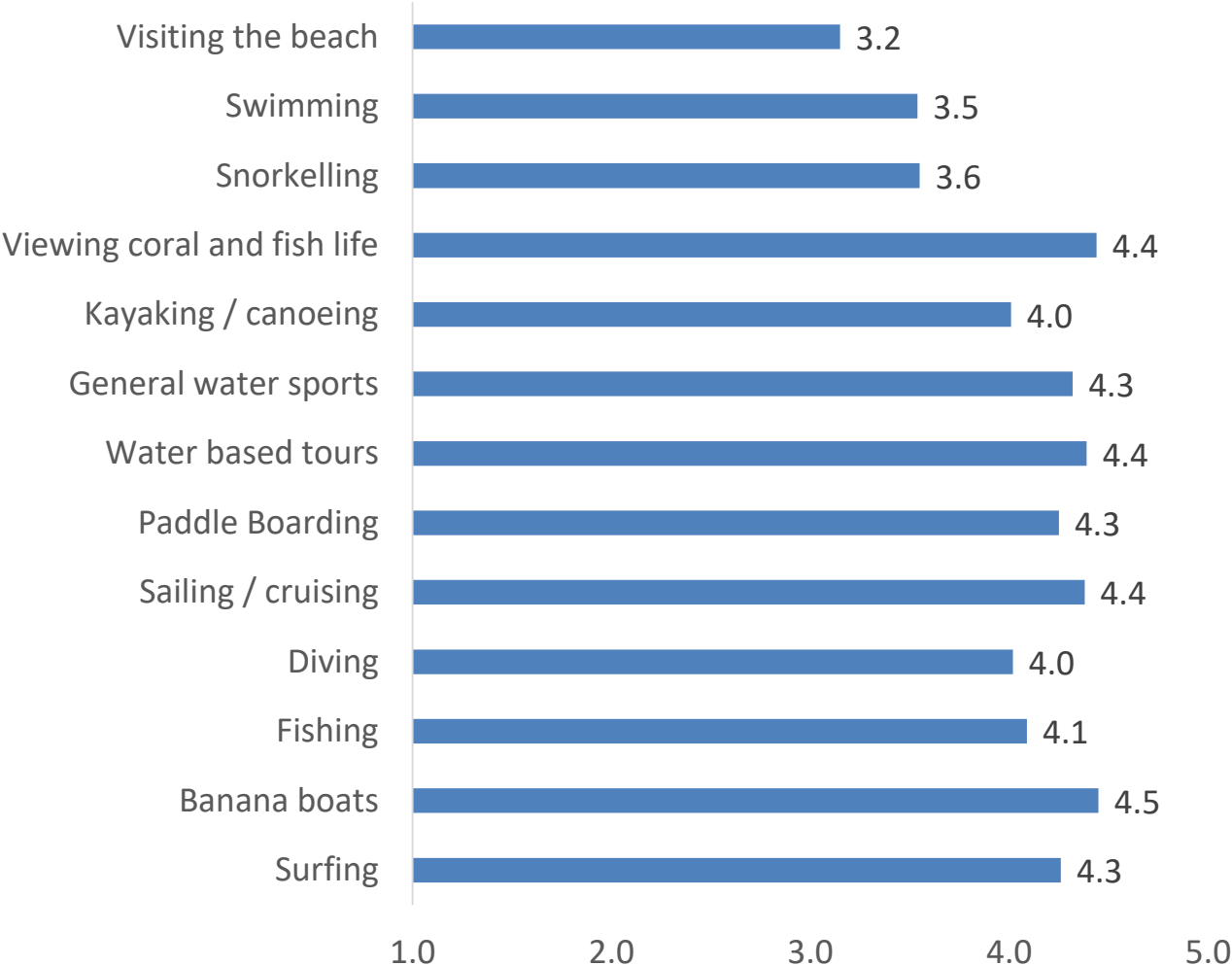
* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

Water based activities

Degree of Participation



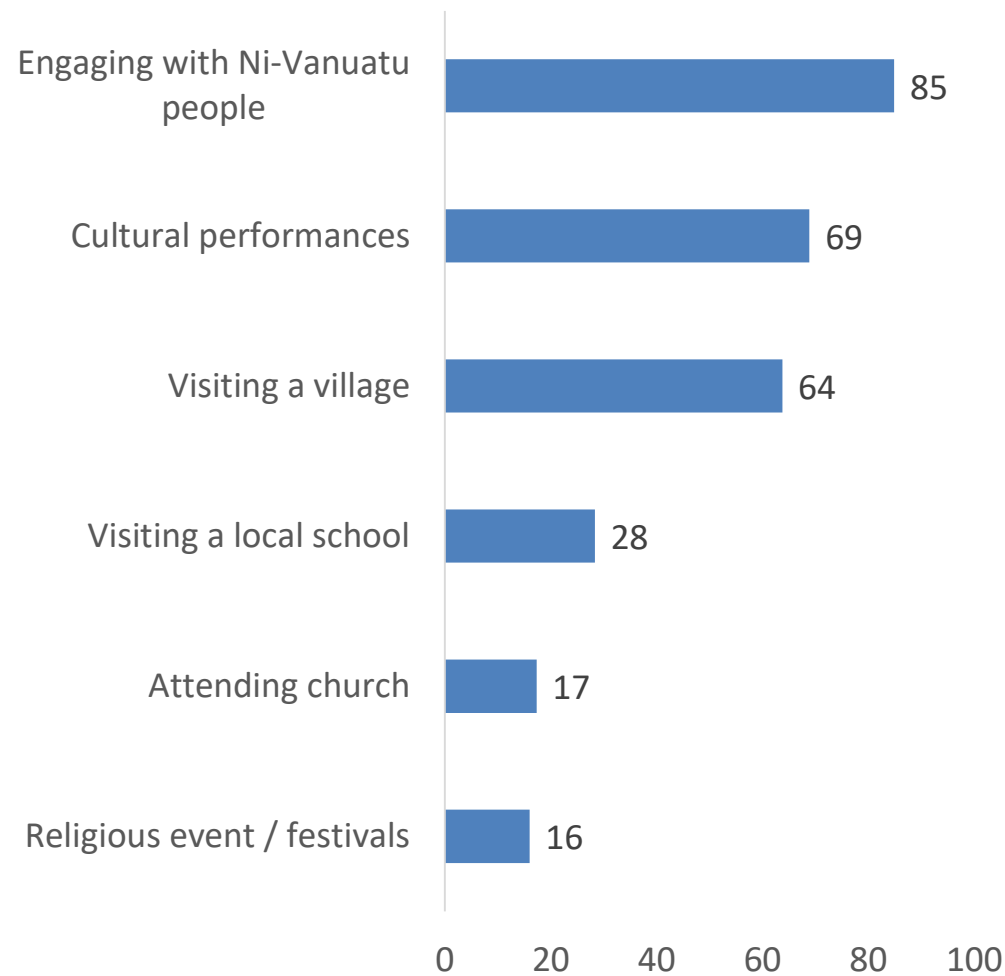
Satisfaction



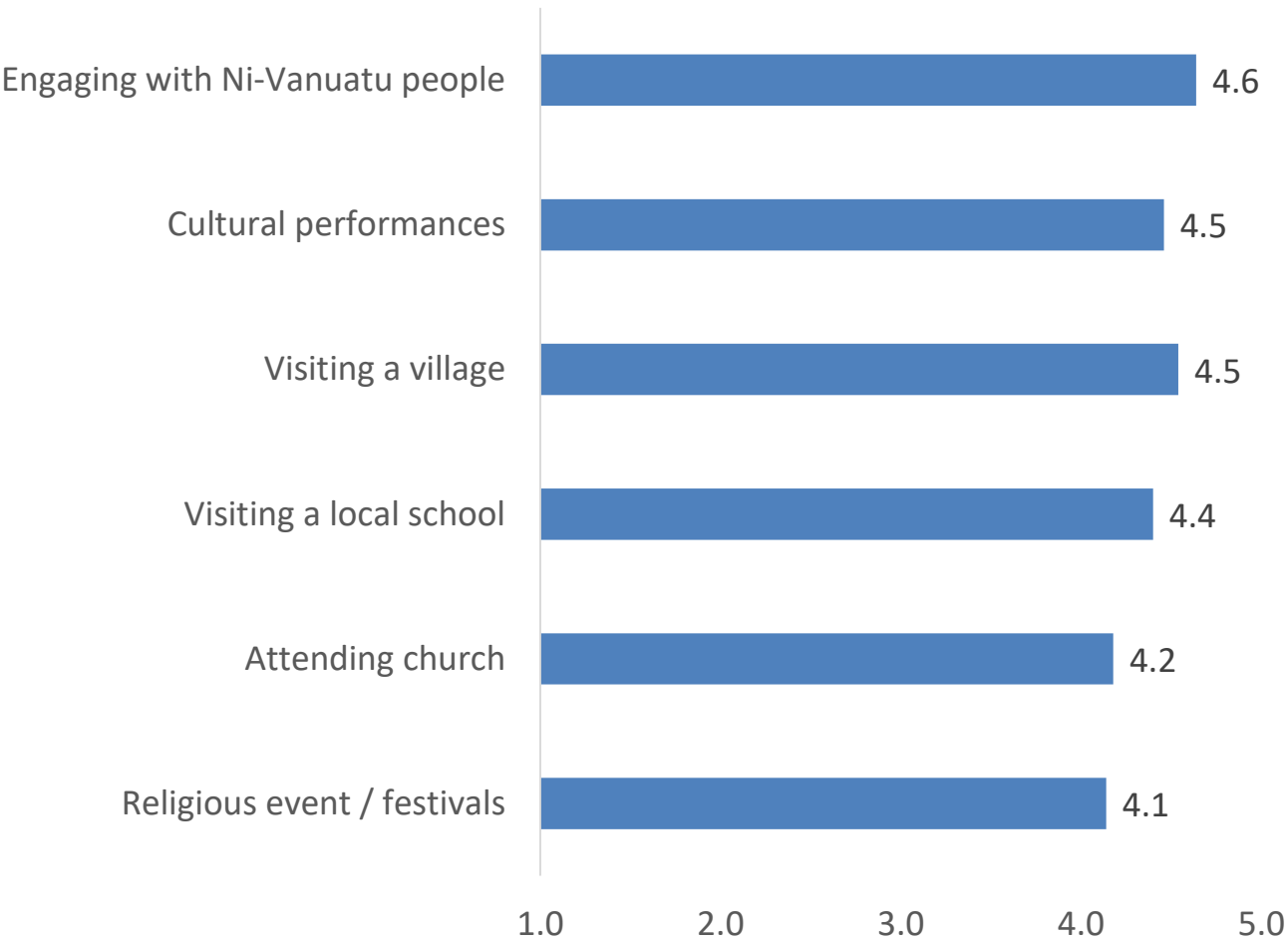
Note: Multiple responses, therefore total does not add up to 100%

Cultural interaction activities

Degree of Participation



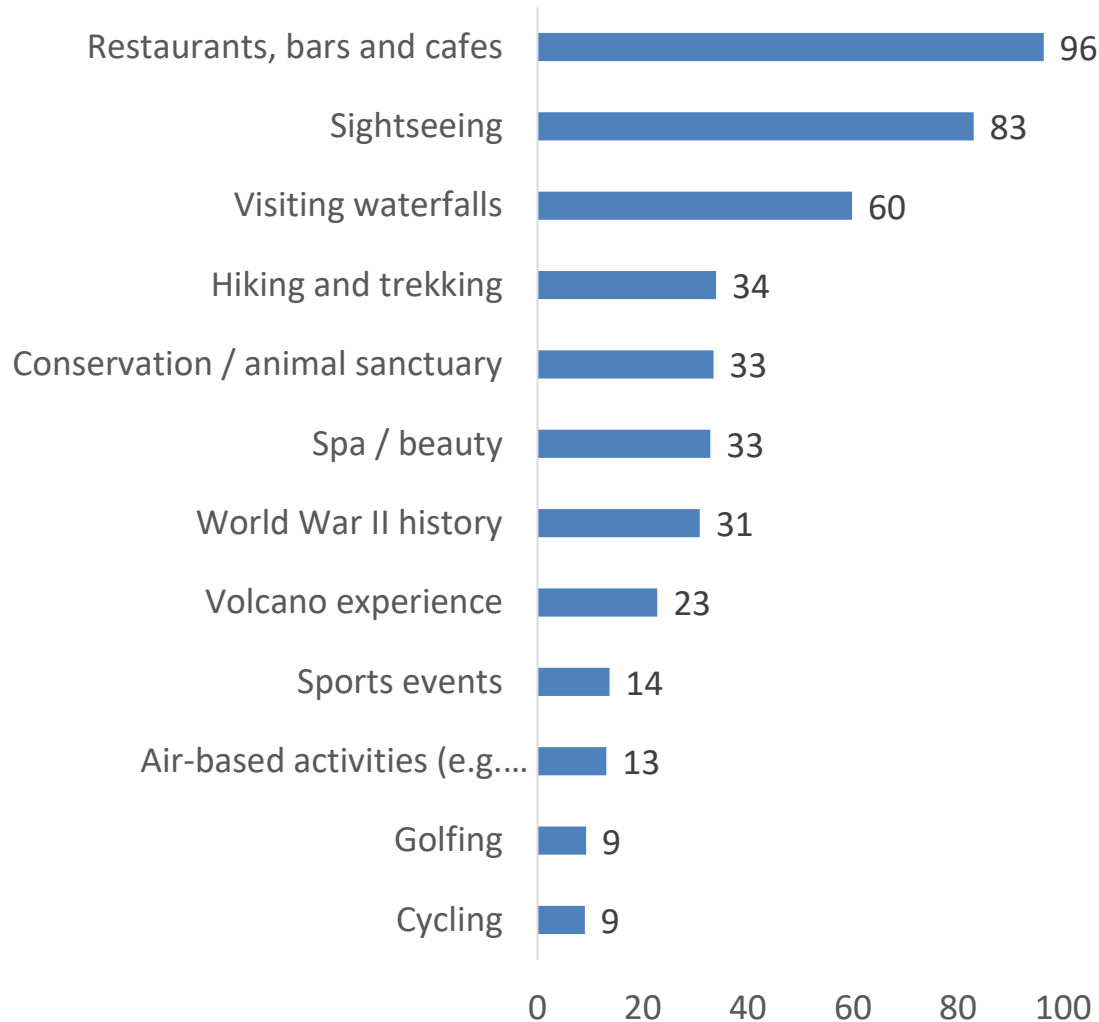
Satisfaction



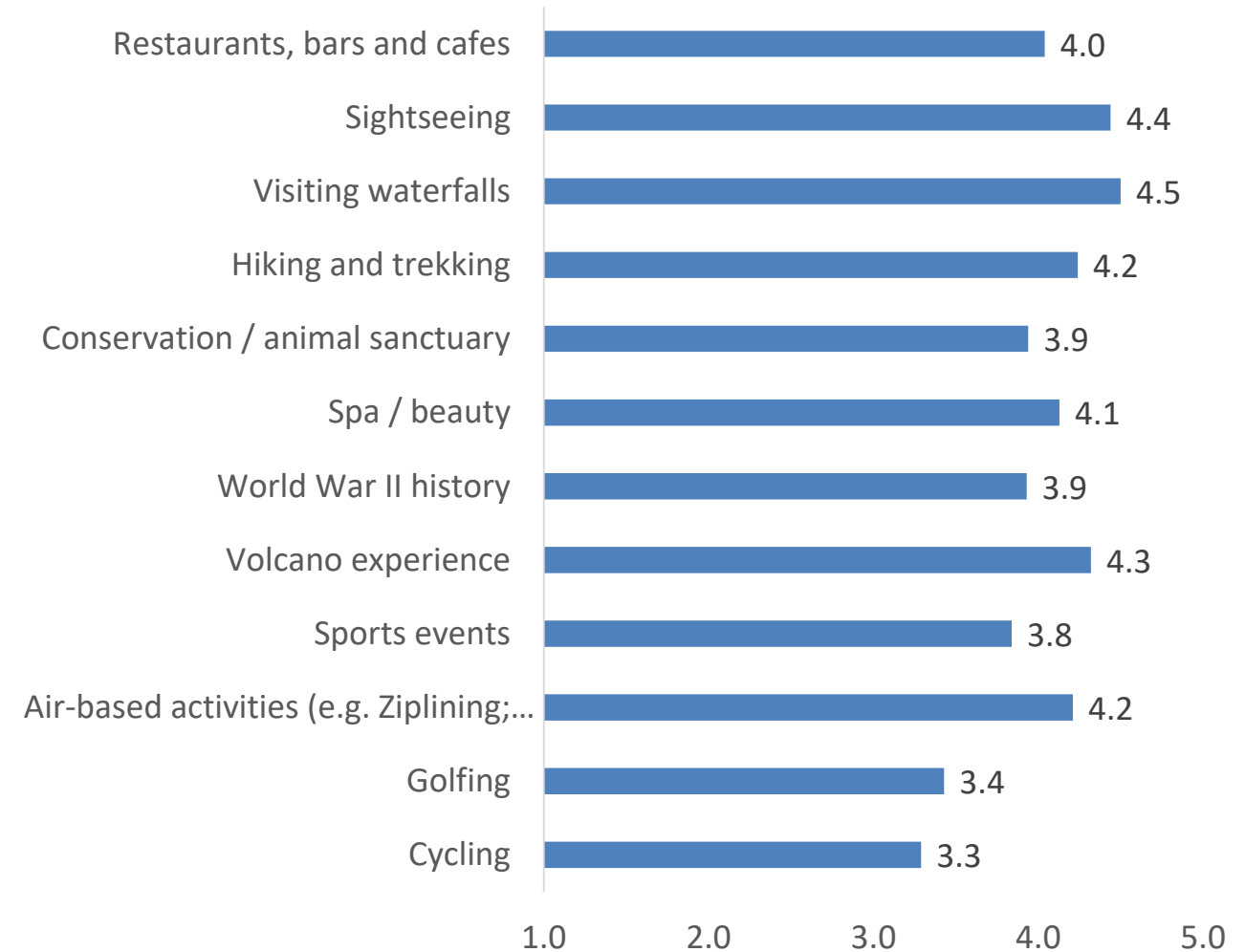
Note: Multiple responses, therefore total does not add up to 100%

Land based activities and touring

Degree of Participation



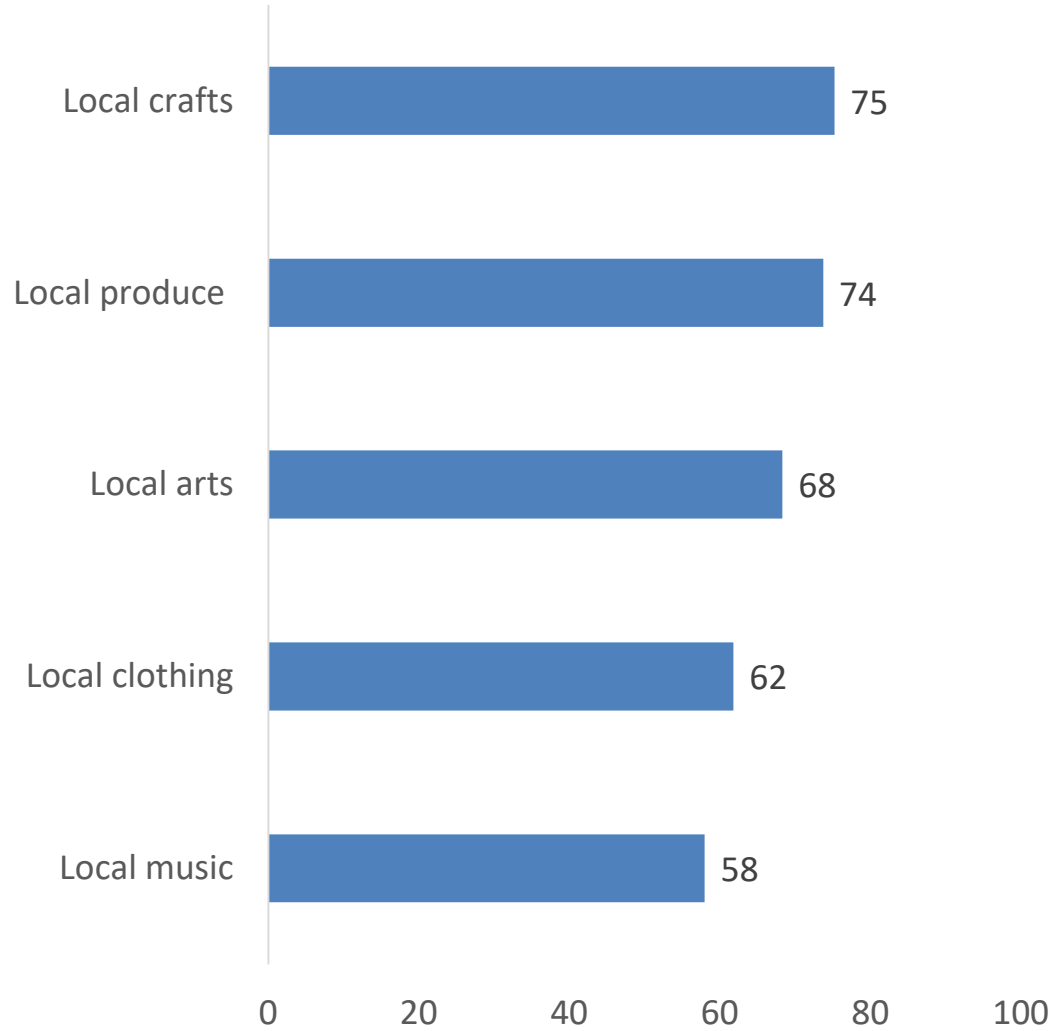
Satisfaction



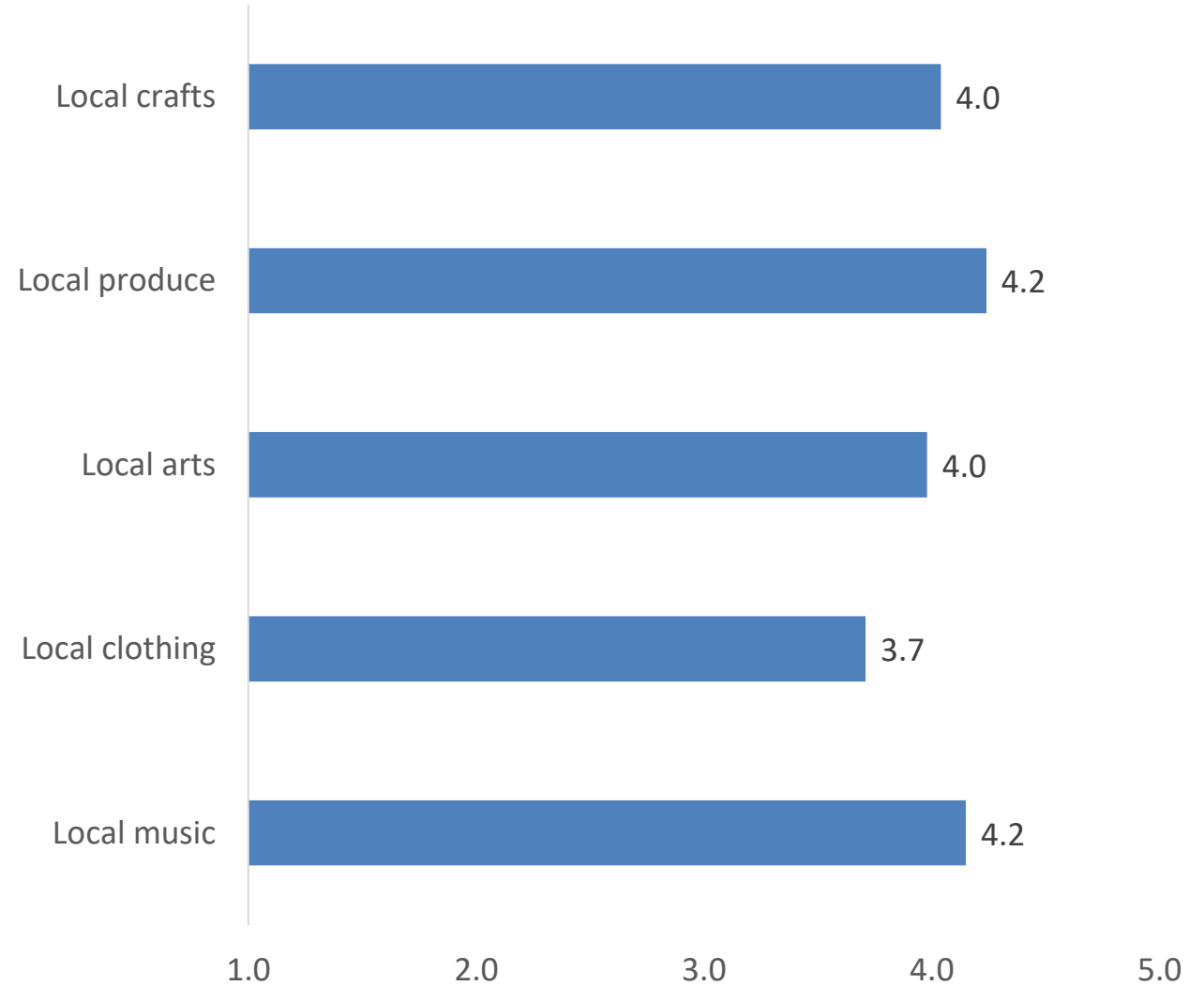
Note: Multiple responses, therefore total does not add up to 100%

Shopping

Degree of Participation

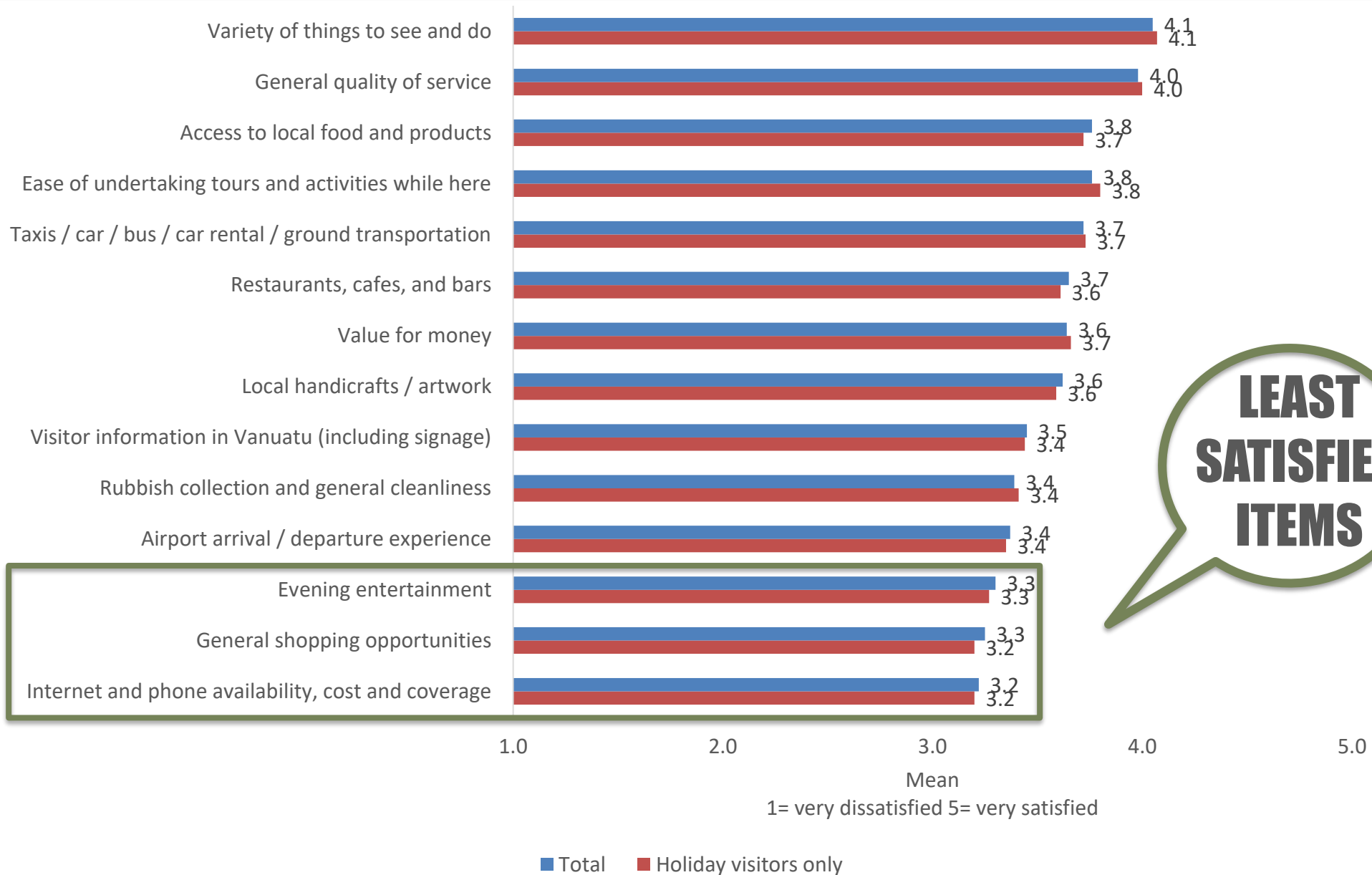


Satisfaction

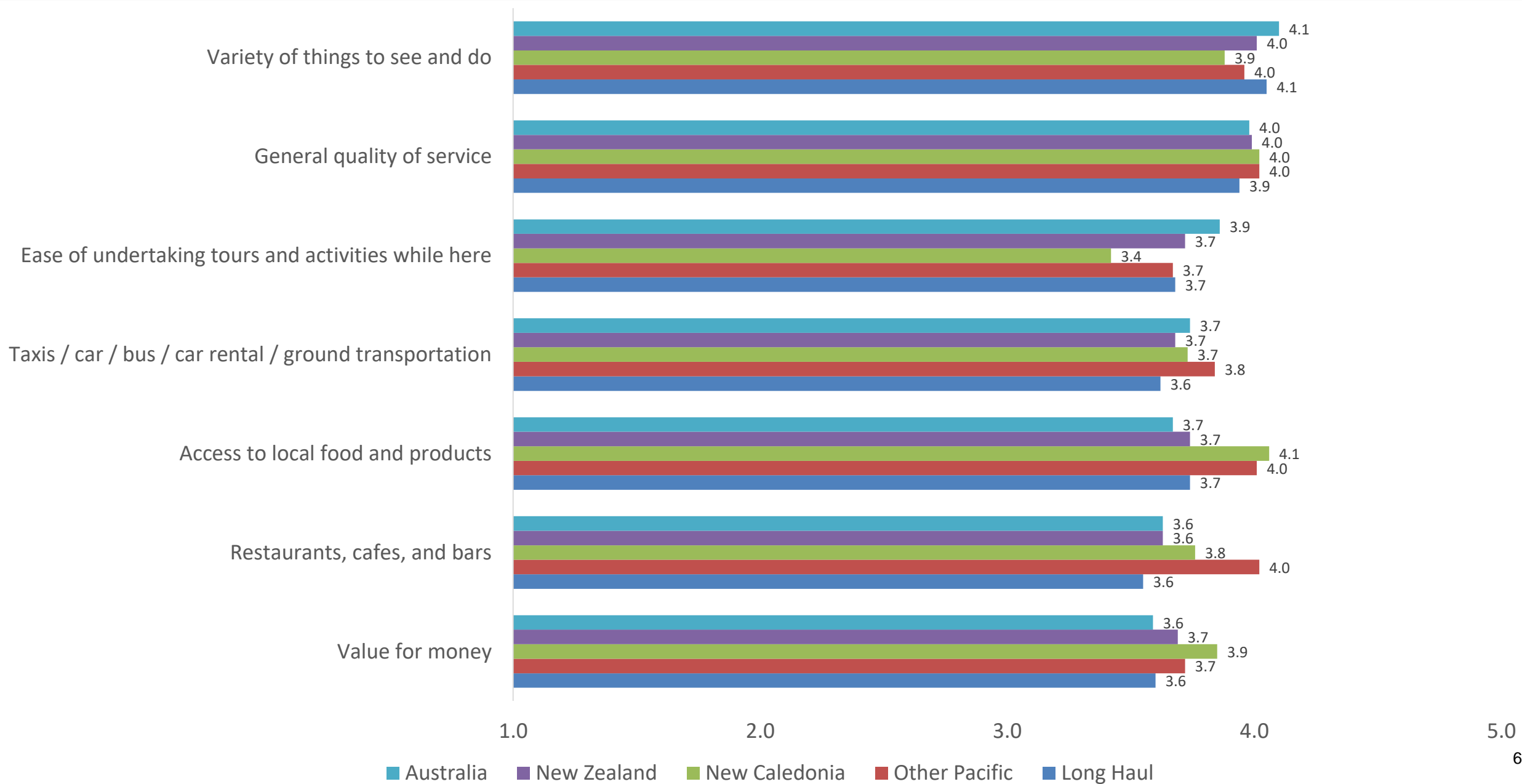


Note: Multiple responses, therefore total does not add up to 100%

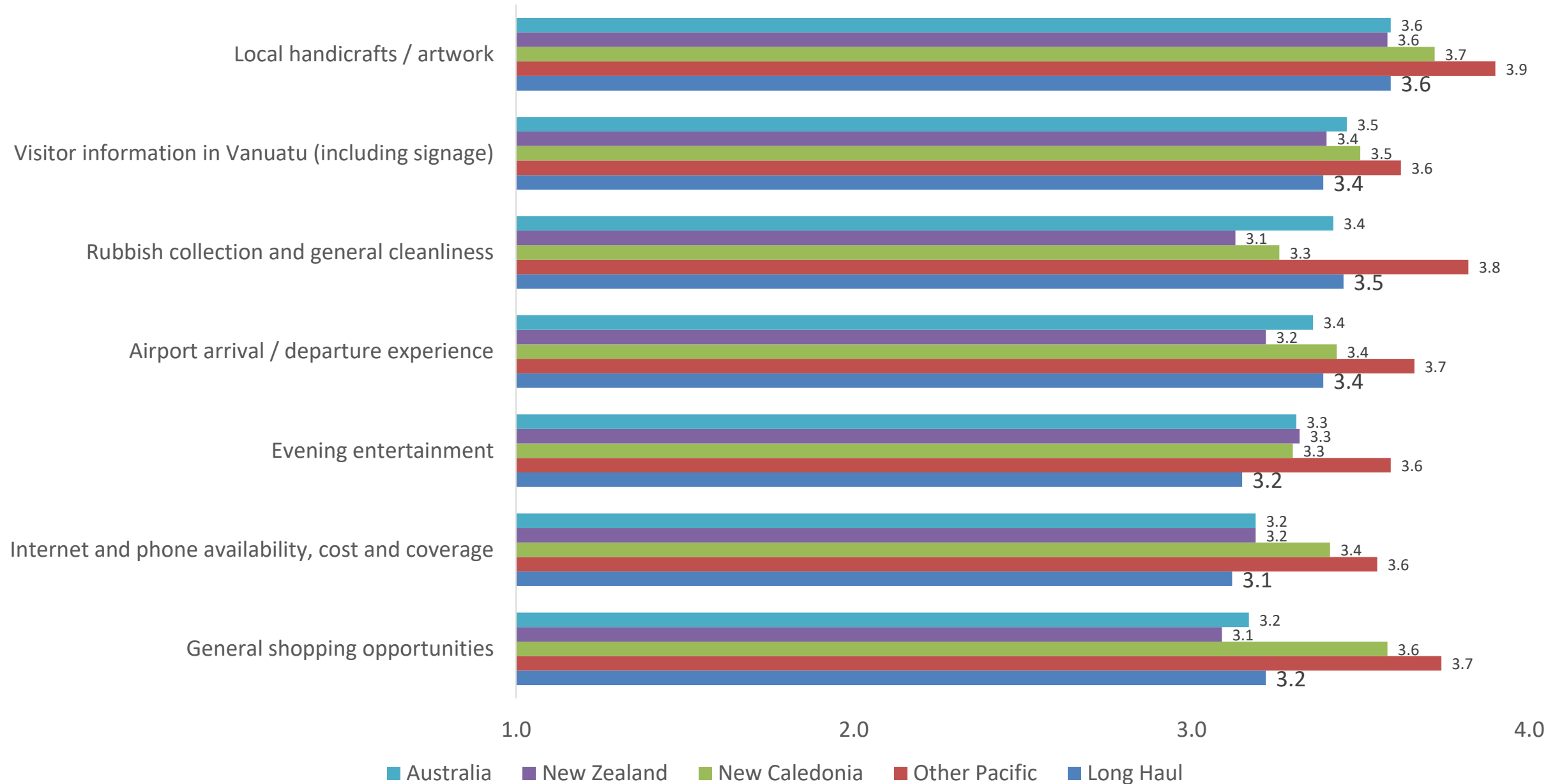
Degree of satisfaction – Total & holiday visitors



Degree of satisfaction – Market breakdown 1



Degree of satisfaction – Market breakdown 2



Most appealing aspects of Vanuatu (Oct – Dec 2019)

Themes	Percent
Local people	47%
Activities, attractions and entertainment, events	34%
Environment, cleanliness, climate	27%
Atmosphere	16%
Food and Beverage	7%
Culture and history	7%
Accommodation	6%
Convenience	5%
Level of service	3%
Local market	2%
Safety	2%
Value for money	1%
Un-commercial	1%
New Developments	1%

Most appealing aspects of Vanuatu (Oct – Dec 2019)

“Good selection of local produce at market houses. Sealing roads around Luganville.”

“Ni Vanuatu people are very special. The undeveloped nature of Santo is beautiful. Day trip to Port was great. Aore Island Resort was immaculate. The unspoiled nature of Santo is what makes it special. Any further developments need to be careful and in keeping with its character. Please avoid any large-scale development. The nature and scale of Aore Island resort is fine.”

“Friendly people offering good service, good food where we stayed, good value for money, lovely weather, good beaches, snorkelling, waterfalls and swimming holes, good church community. Always felt very safe, even when driving or walking about unaccompanied.”

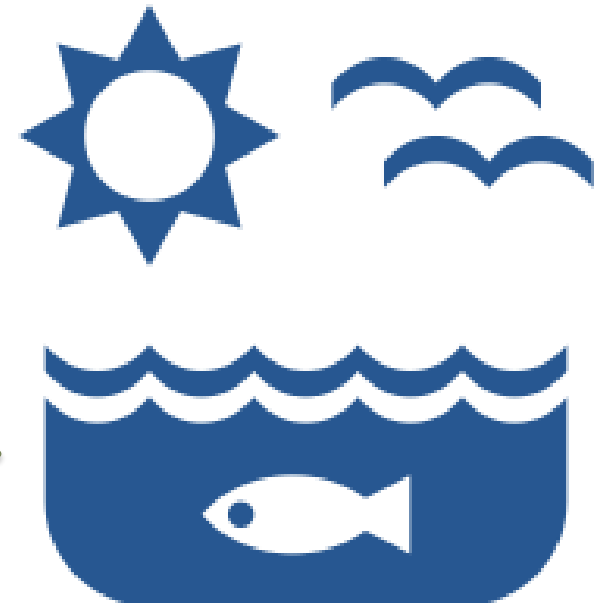


Most appealing aspects of Vanuatu

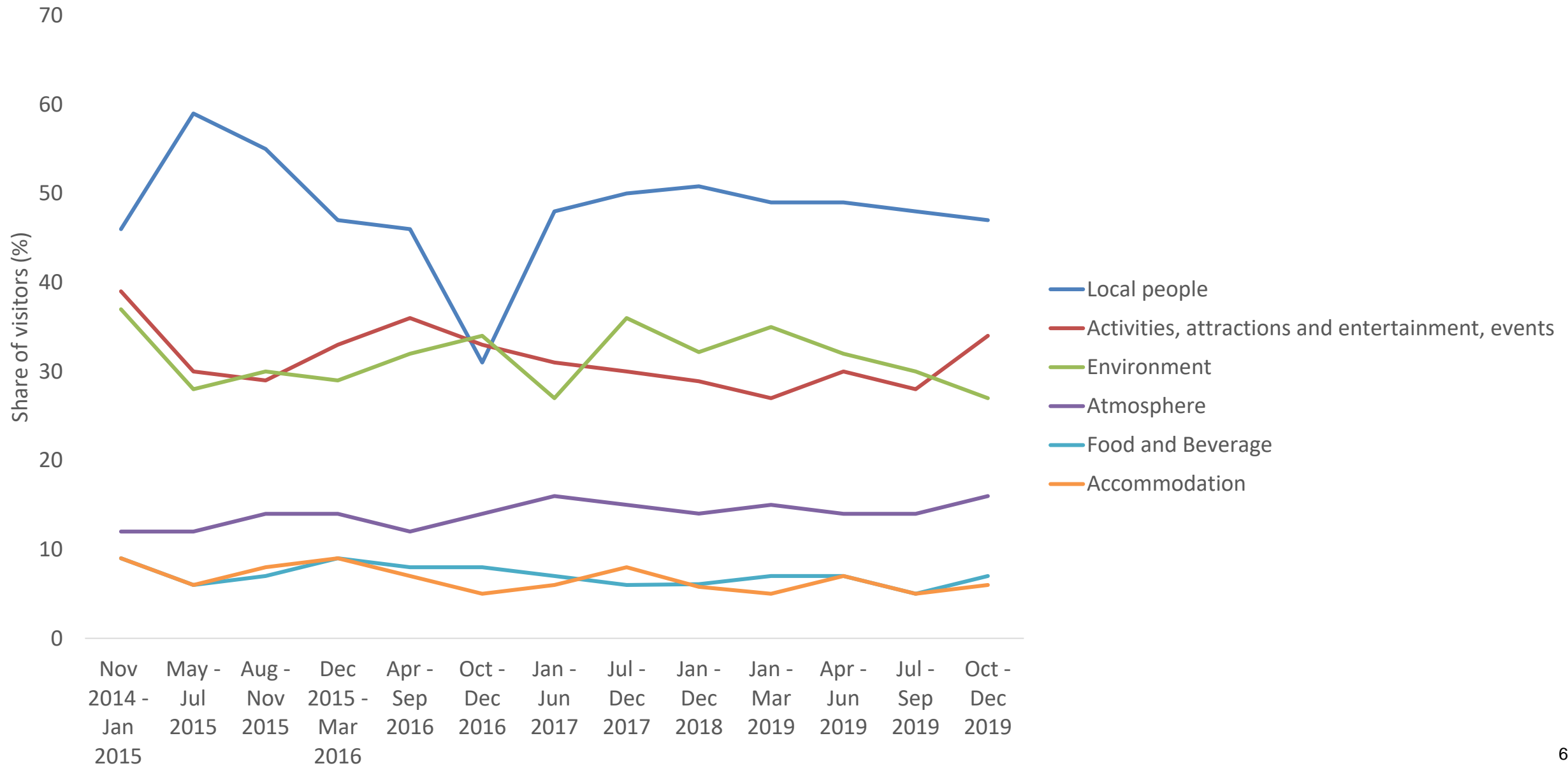
"The holiday was planned as a relaxing break so we spent most of our time in the resort (Iririki) which was fabulous. We took one tour to the volcano on Tanna which was definitely the highlight of our trip."

"Improvement in infrastructure and roads. And revegetation after cyclone."

"Seeing an active volcanoes, there isn't a lot of other experiences that can beat it. The local culture and way of life fascinated me and I found it very interesting to learn."



Most appealing items



Least appealing aspects (Oct – Dec 2019)

Public services, facilities and infrastructure	17%
Rubbish, cleanliness and natural environment care	17%
Price of goods and service	17%
Attractions and activities	14%
Food and beverage	12%
Local people, standard of service	11%
Airport and flight related issues	10%
Bus, rental cars, scooter or transport	7%
Shop and the shopping experience	7%
Port Vila	7%
Accommodation	6%
Chinese influence	6%
Social divide and social issues	5%
Safety-related issues	4%
Stray animals and mosquitos, diseases	2%
Weather	2%
Too touristy	1%*

* Other reasons have not been included due to low percentages

Least appealing aspects of Vanuatu

"The cost of the tourist adventure attractions which are way overpriced probably because of the day tourists from the ships. Should be a cheaper price for those staying in the area. For the first time we rented a vehicle which was handy but very expensive."

"The amount of trash on beaches and in streets was disturbing. For being an island nation with such beautiful and tourist-attracting natural ecosystems, both on land and underwater, I thought there would be much more attention paid to cleaning up trash, recycling, etc."

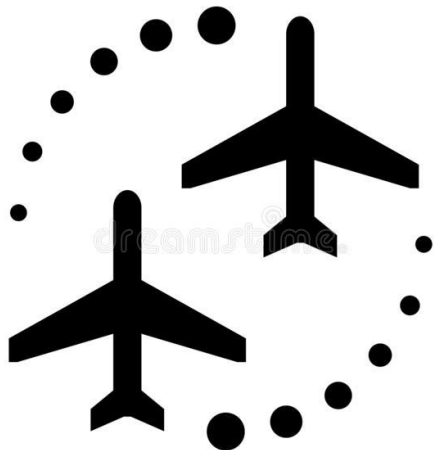


Least appealing aspects of Vanuatu

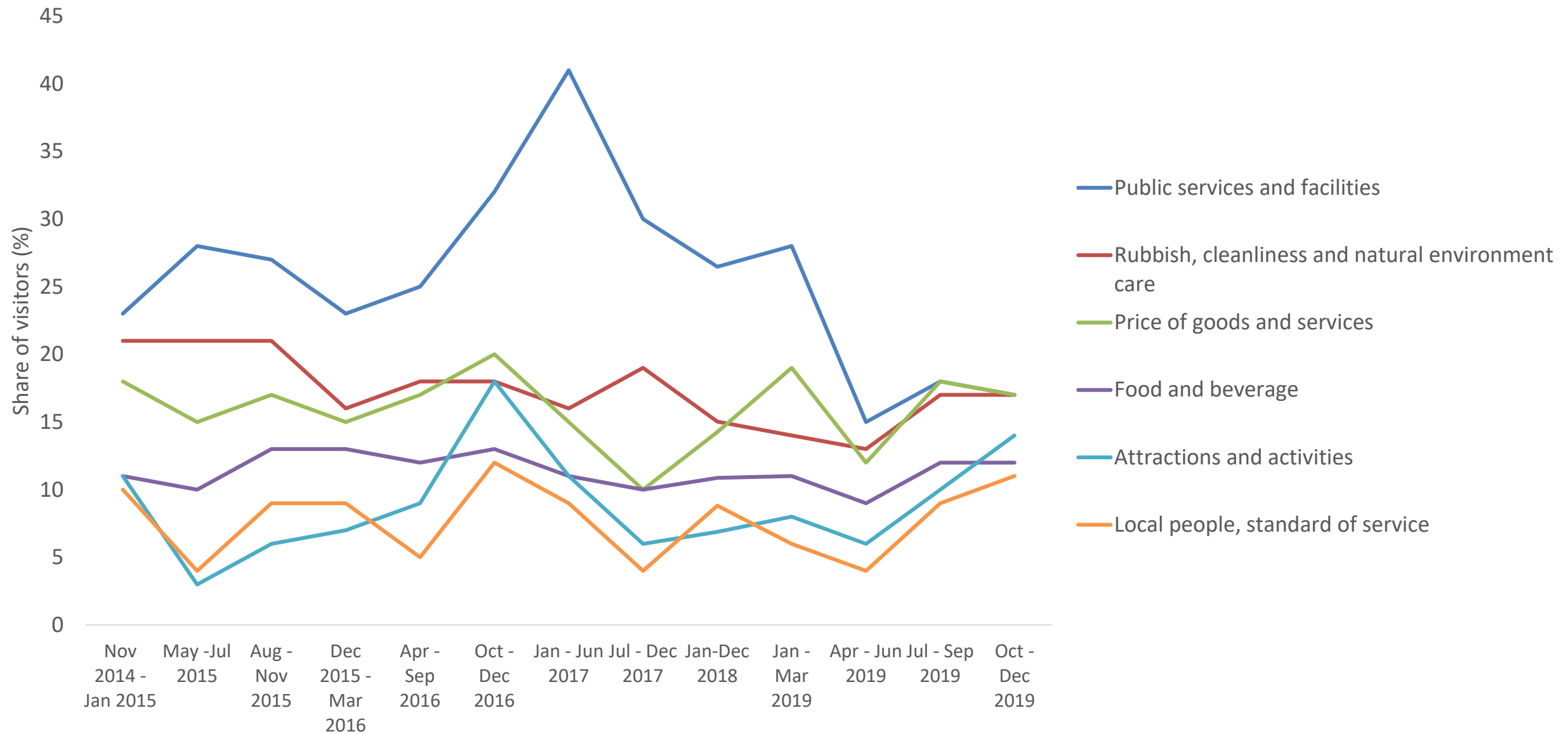
"Having to wait 13 hours because our flight was delayed. We weren't offered any compensation whatsoever, and we are trying to claim insurance, but we can't get ANY RESPONSE from the airline to help with our claim. We were not told why. We got up at 4.30 in the morning to get flight home but it had been delayed-at least 3 times and finally were told 6.30 at night."

"A lot of the local handicrafts and markets have been replaced by shops with cheap Chinese goods. I really missed perusing the handicraft stalls I remembered from my first time in Port Vila years ago."

"Haven't quite got the tourist service thing right - tend to disappear to get someone to help you with simple questions - like where are the spoons for the buffet. Yet they tried and it was often shyness that was the barrier."



Least appealing items

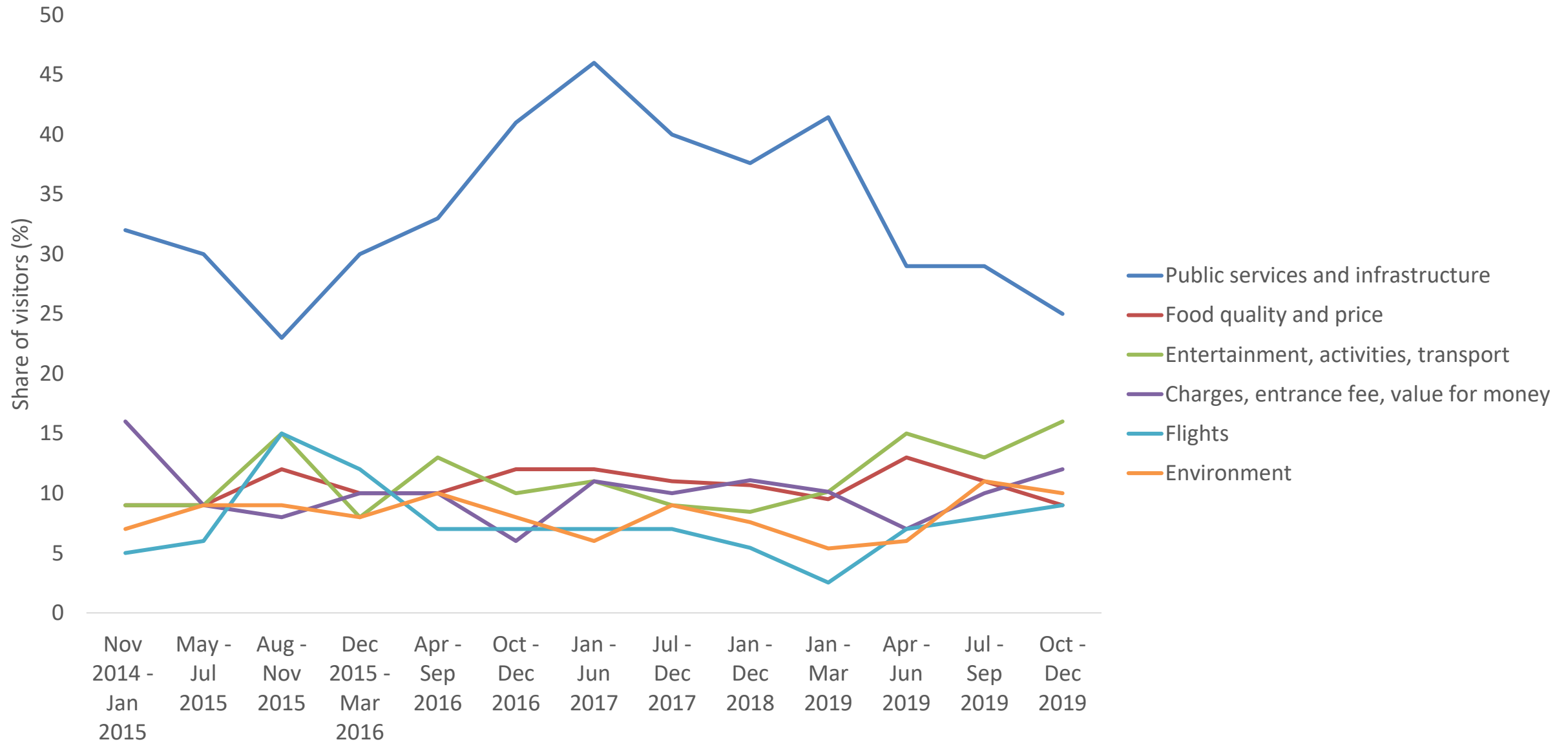


Suggestions for improvement (Oct – Dec 2019)

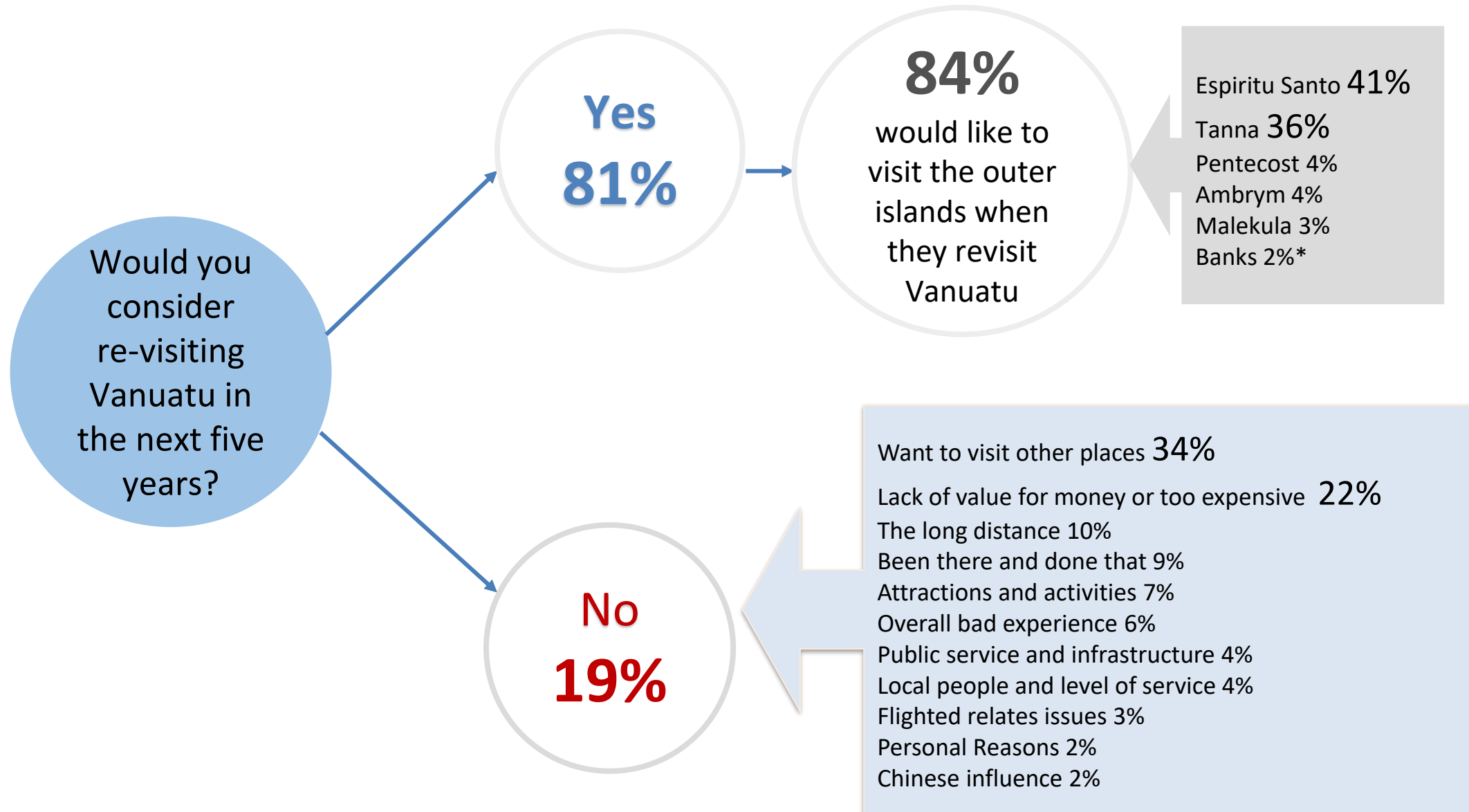
Themes	Percent
Public services and infrastructure	25%
Entertainment, activities, transport	16%
Local People, Standards of Service	13%
Charges, entrance fee, value for money	12%
Environment (cleanness, rubbish, nature)	10%
Food quality and price	9%
Flight Related Issues	9%
Accommodation	8%
Stayed longer, visit other islands and see more	6%
Shopping experience	4%
Undecided or other	3%
Social issues	2%*

* Other reasons have not been included due to low percentages

Suggestions for improvement

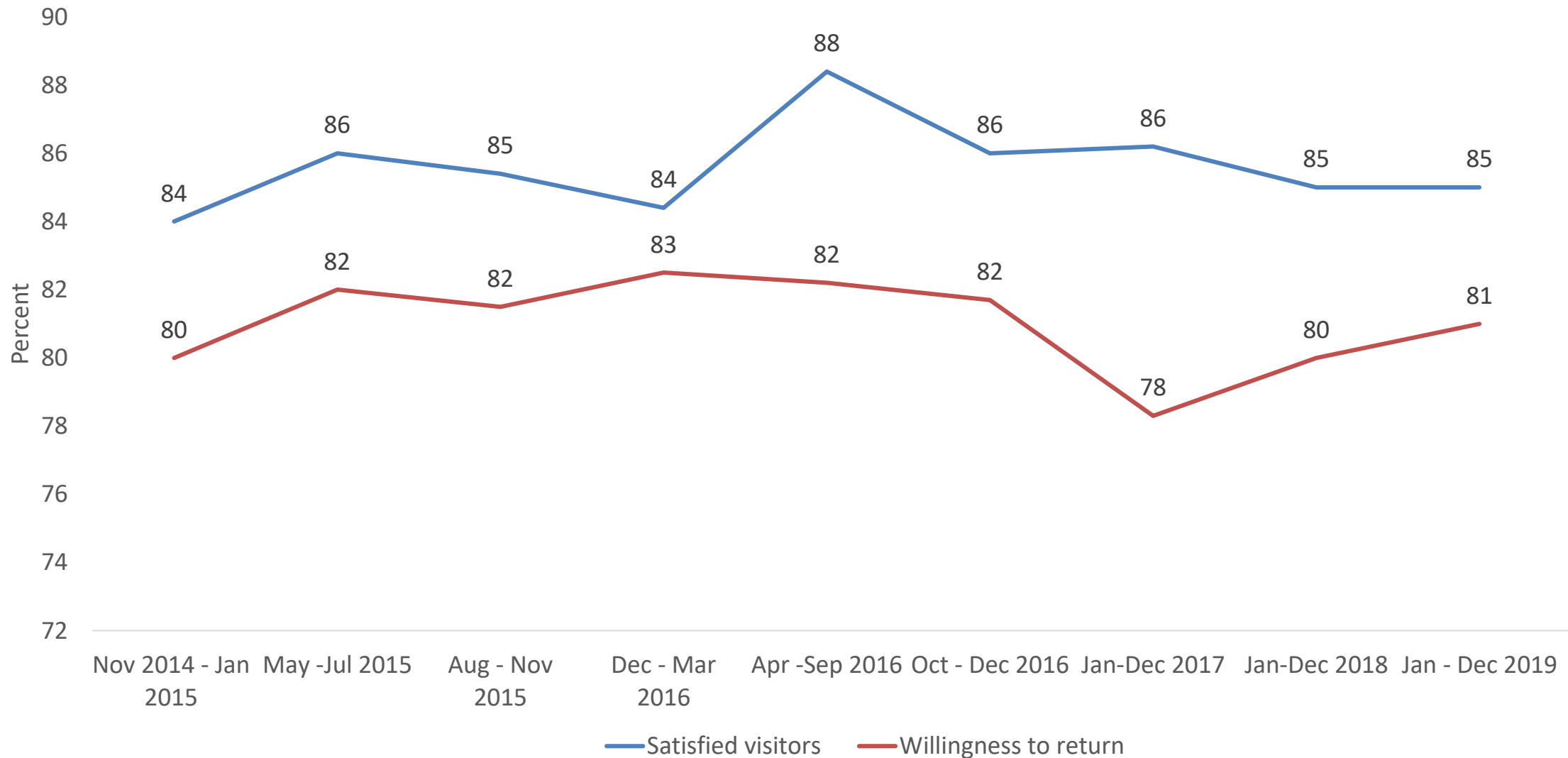


Willingness to return



* Other reasons/Islands have not been included due to low percentages

Willingness to return and satisfaction



* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

THANK YOU



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