

Vanuatu International Visitor Survey

Jan – Dec 2018

AUT



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Summary of the Key Findings

Total Direct Economic Impact for Jan-Dec 2018

US\$179.9 Million (Vt 19.8 billion) directly flowing to Vanuatu Economy
US\$ 1,554 (Vt 171,128) per visitor per Trip; 115,631 visitors in all
US\$192 (Vt 21,127) per visitor per day

Respondent Profile and Characteristics

- 76% from Aus/NZ
- 76% under 59 years
- 56% female
- 71% household income less than \$100,000

Decision Making

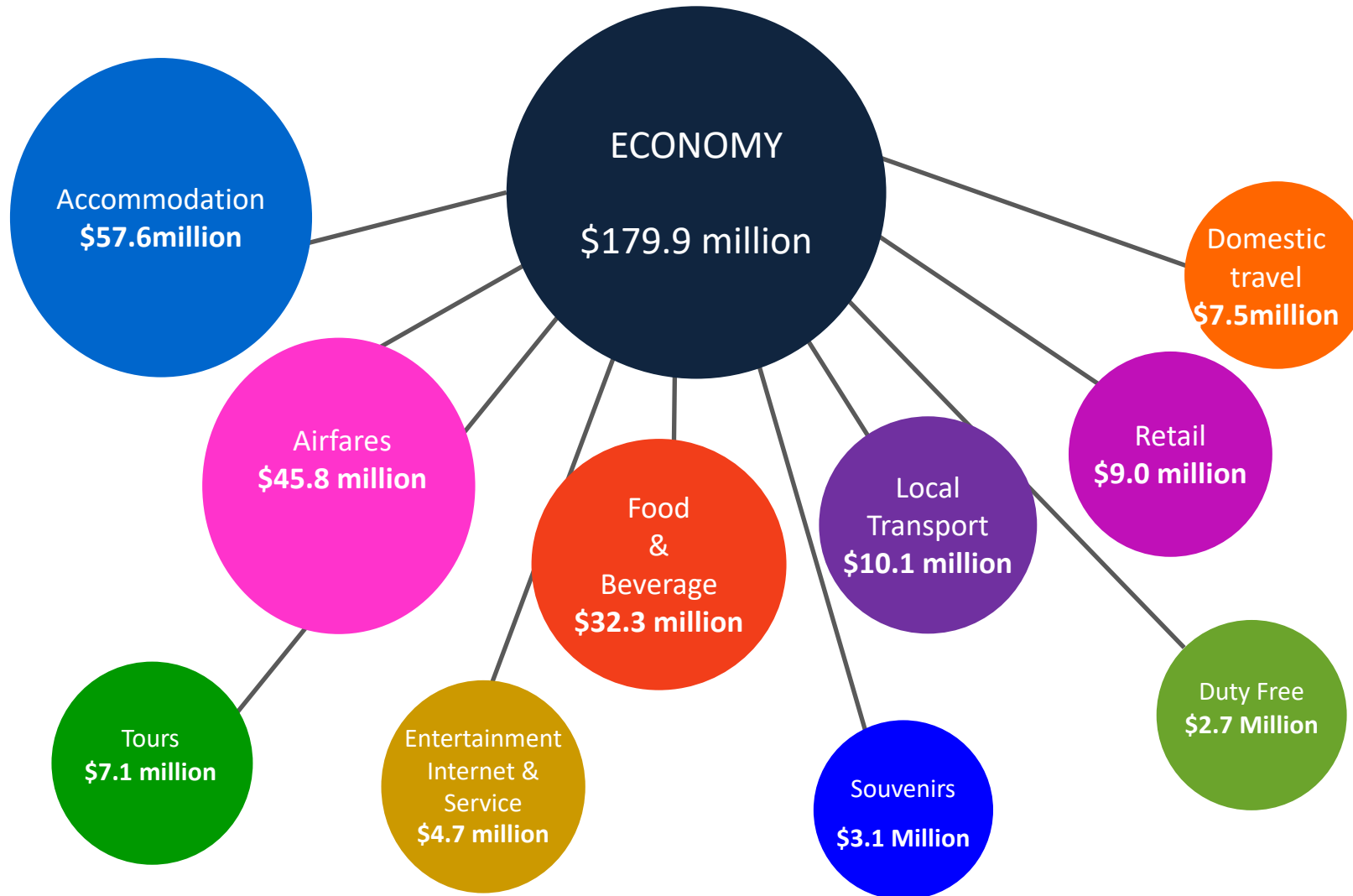
- Friends and family , previous visits, and Google are key sources for finding Vanuatu as a destination
- 35% purchased by direct with airlines and/ or a accommodation places

Satisfaction

- 80% would come back
- Satisfied with local people, environment, activities and attractions
- Public service and facilities, rubbish, prices of goods and services least appealing

Direct Economic Impact for Jan – Jun 2018

Pre-Arrival and in Country Spend



Presentation Structure



Respondents (Jan – Dec 2018)

Total number of valid e-mails sent: **46,025**



Conversion
rate of
10.8%

Total number of responses: **4,977**



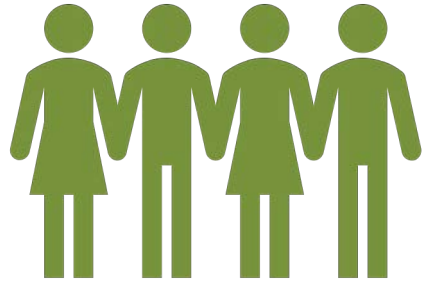
4.3% of all
visitors during
the period

Responses cover a total of
6,518 adults and **1,047 children**



6.5% of all
visitors during
the period

IVS Respondents (Jan 2015 – Dec 2018)



Respondents
to Date
20,055



Total people
included in
expenditure sections
37,934

Visitor Characteristics - IVS Respondent Data



Household Income

- 37% Under \$50,000
- 34% \$50,000 - \$100,000
- 29% Over \$100,001



Age

- 19% 30-39 years old
- 19% 40-49 years old
- 23% 50-59 years old



Country of Origin

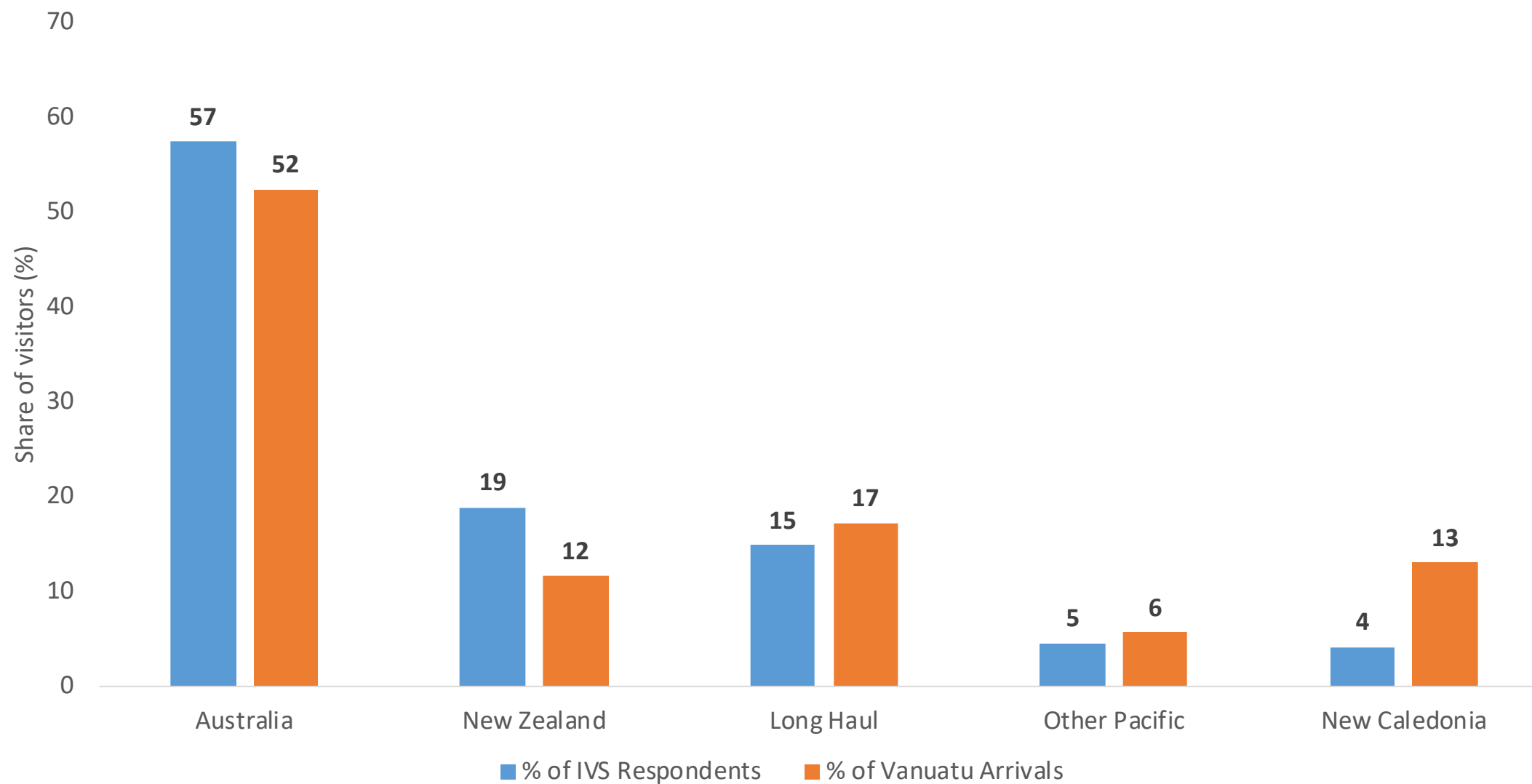
- 57% Australia
- 19% New Zealand
- 15% Long Haul
- 5% New Caledonia
- 4% Other Pacific

Gender

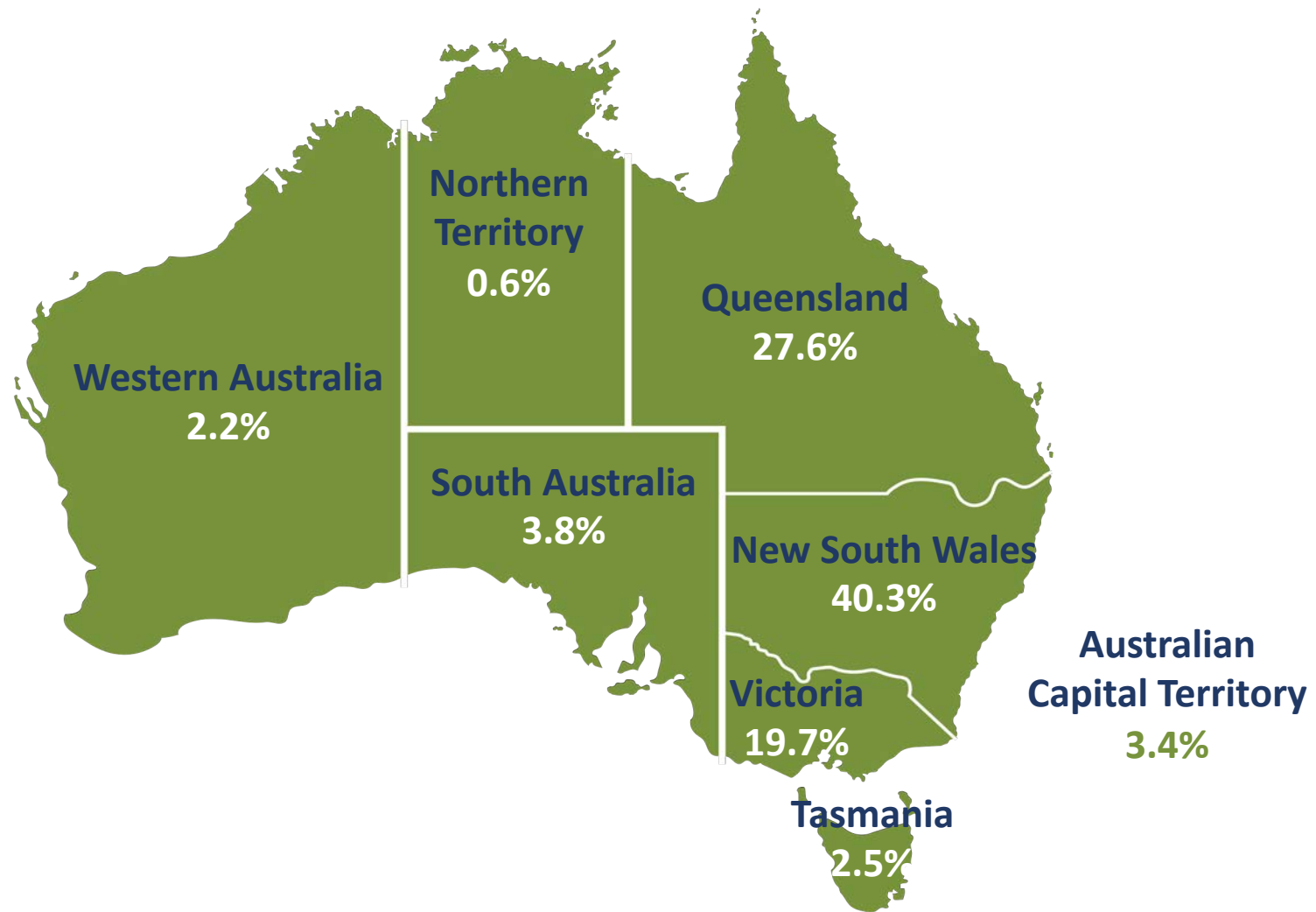


Females

Country of Origin

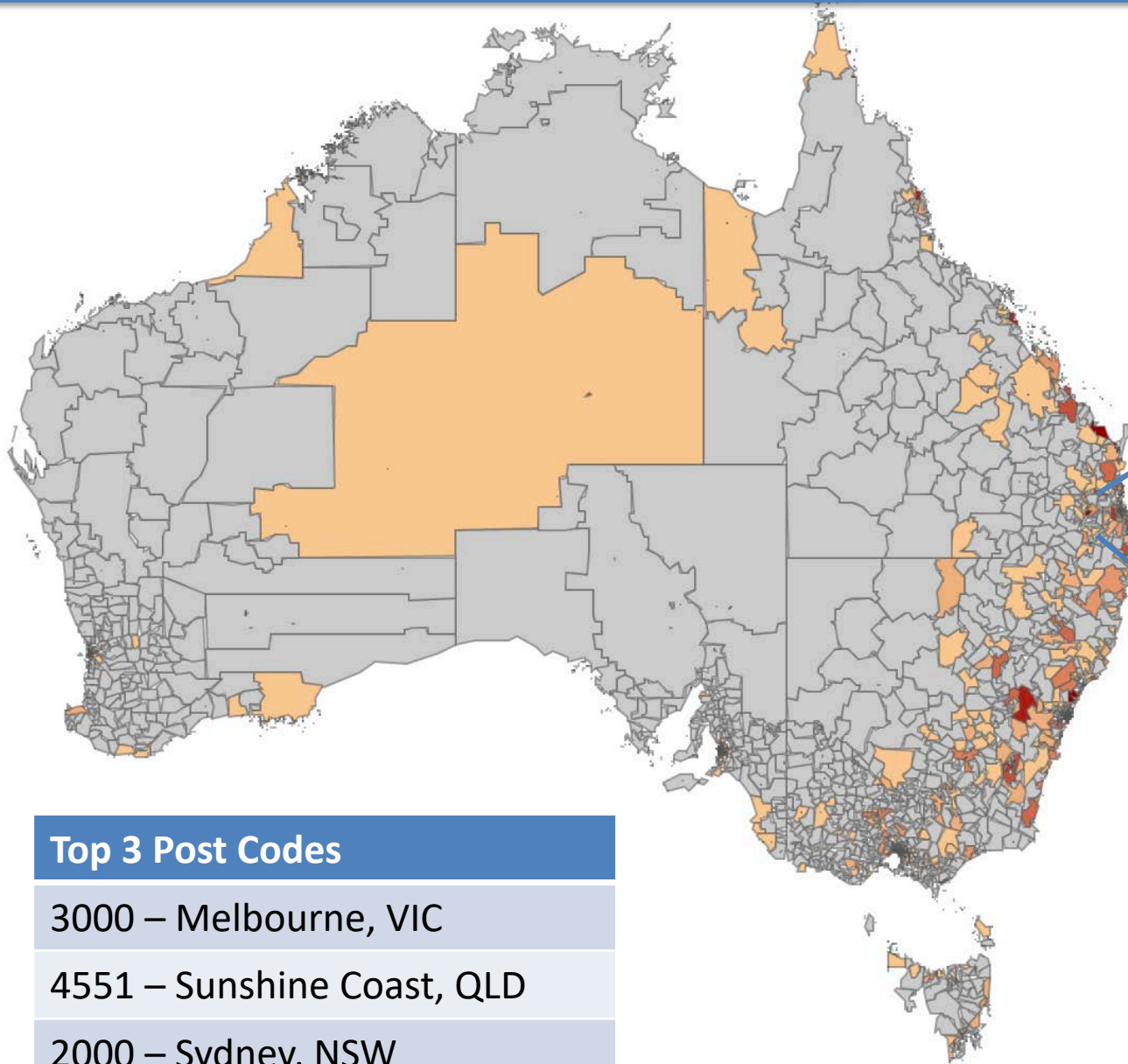


Australian Respondents - IVS Respondent Data



New South Wales, Queensland and Victoria make up **87.6%** of all Australian visitor arrivals

Heat Maps for Australia (January-December 2018)

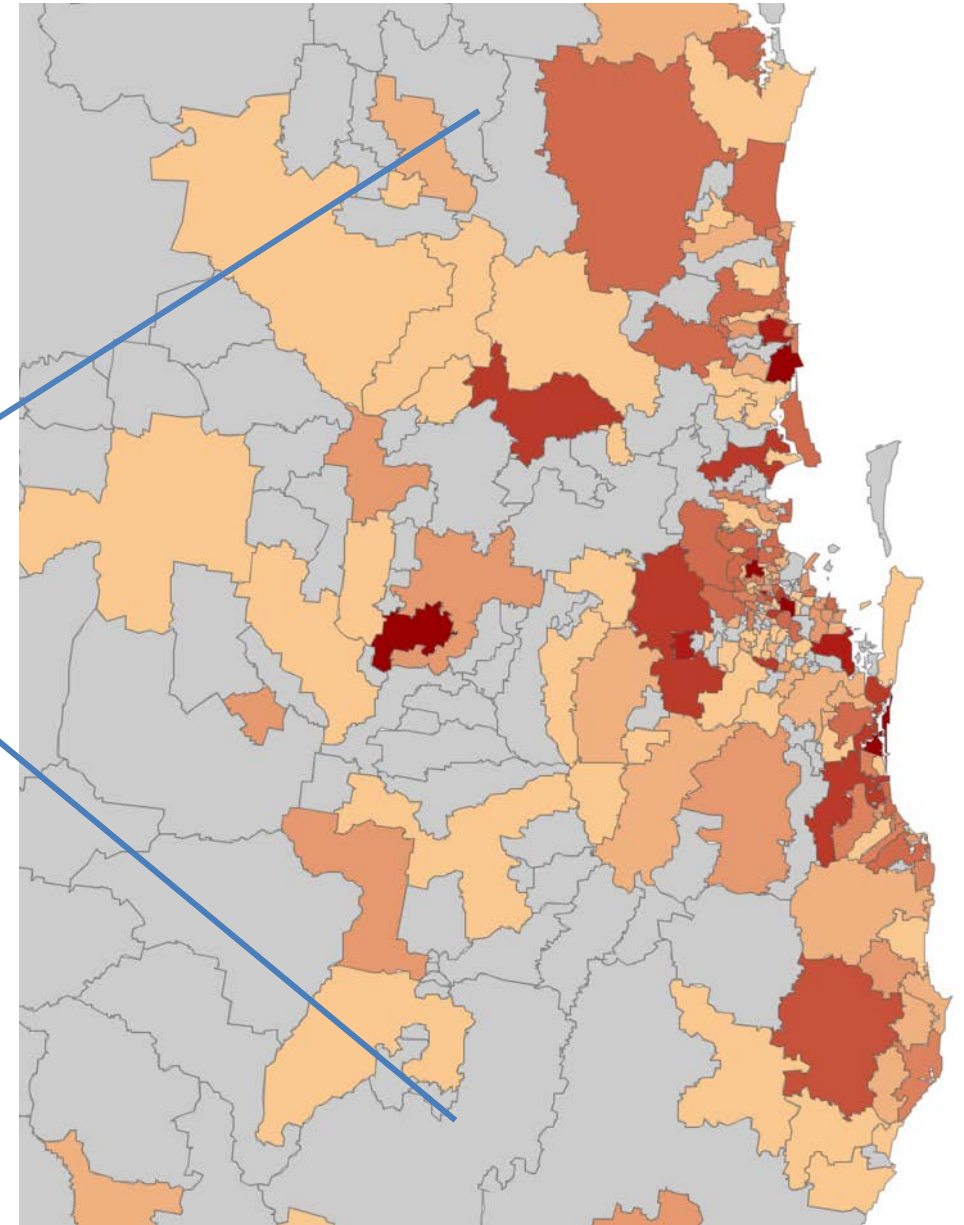


Top 3 Post Codes

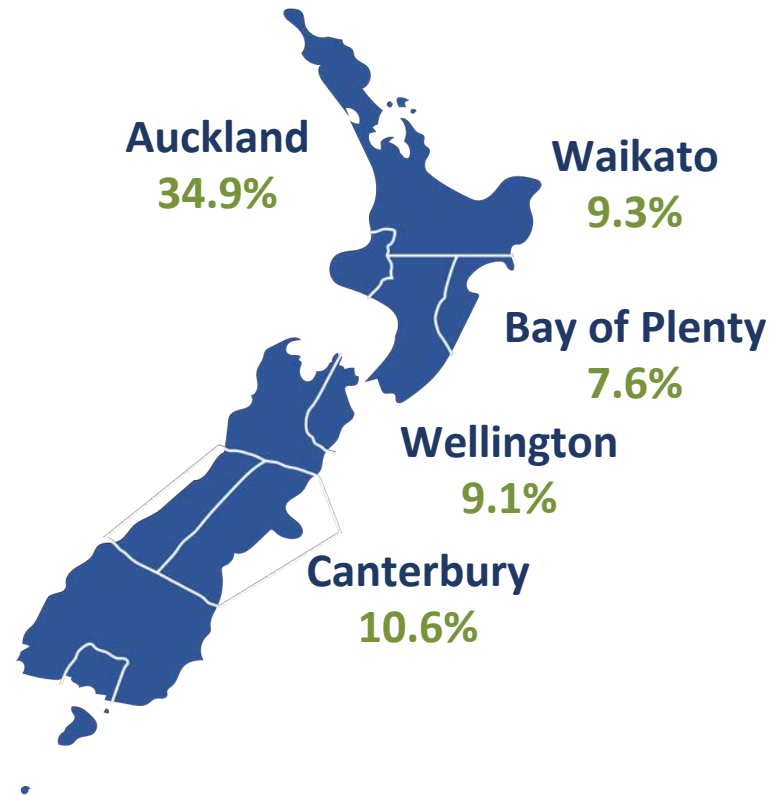
3000 – Melbourne, VIC

4551 – Sunshine Coast, QLD

2000 – Sydney, NSW

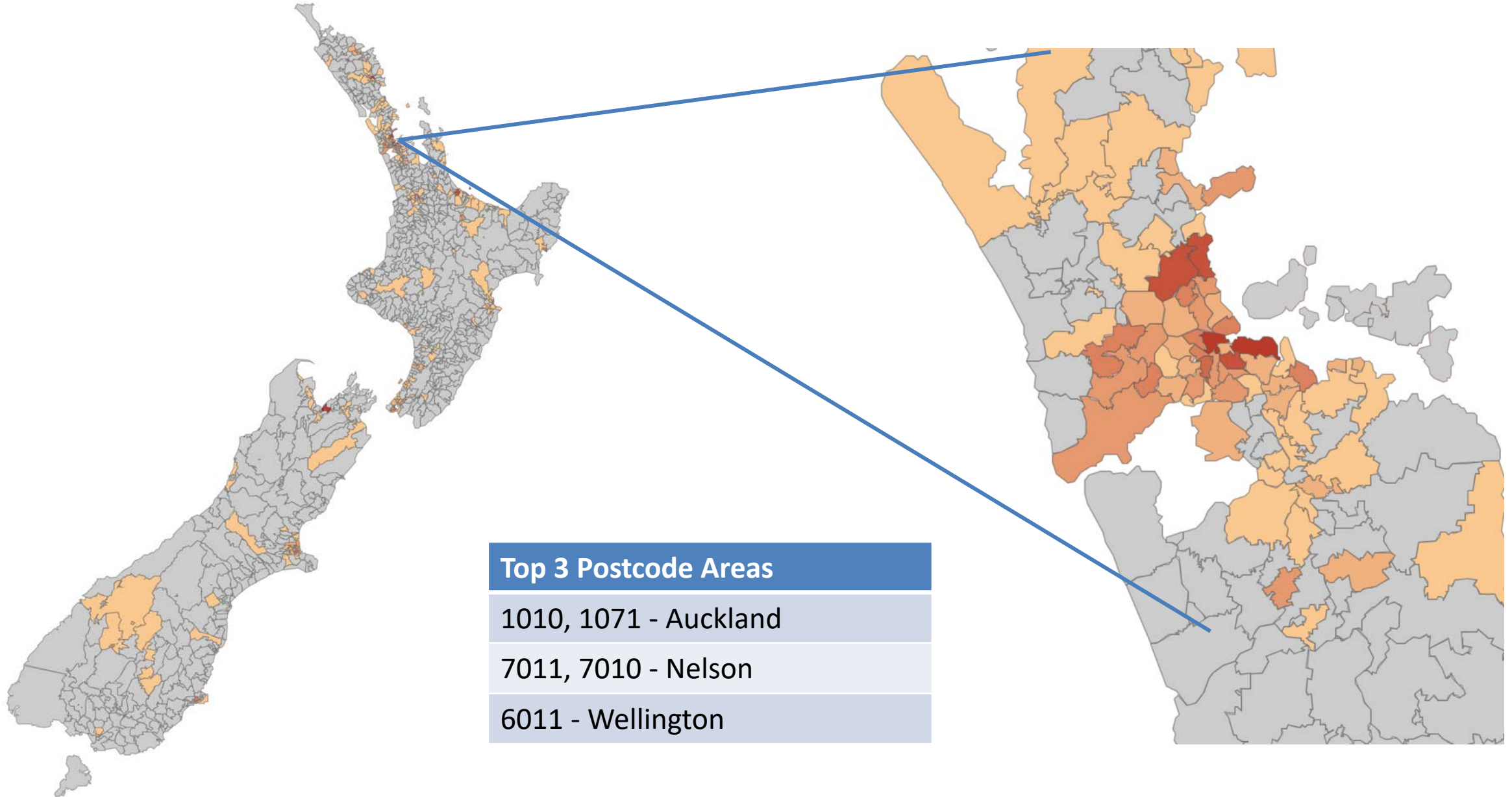


New Zealand Respondents - IVS Respondent Data



Auckland, Waikato, Canterbury, Wellington, Bay of Plenty, and make up **71.5%** of all New Zealand visitor arrivals

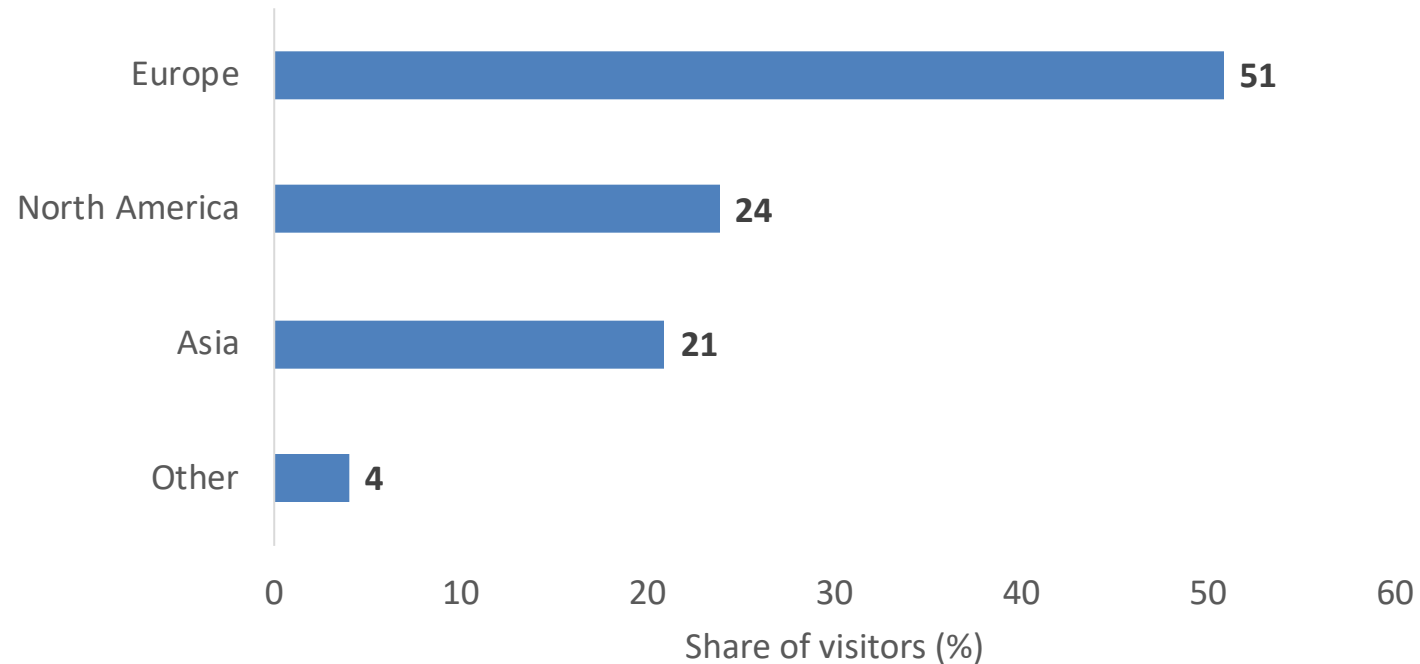
Heat Maps for New Zealand (January-December 2018)



Long Haul Market- Region Breakdown

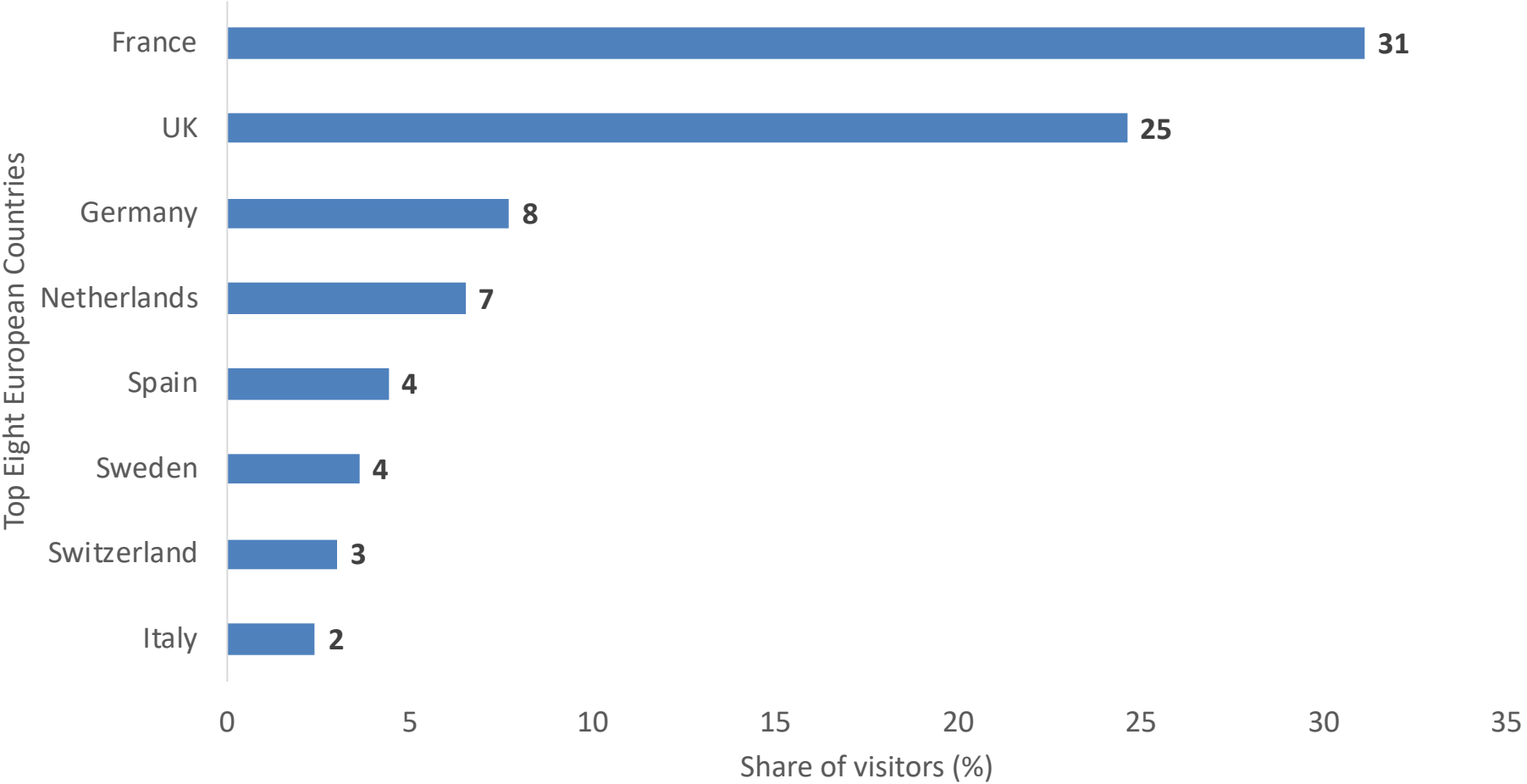
Long Haul – Region Breakdown

15% of IVS respondents



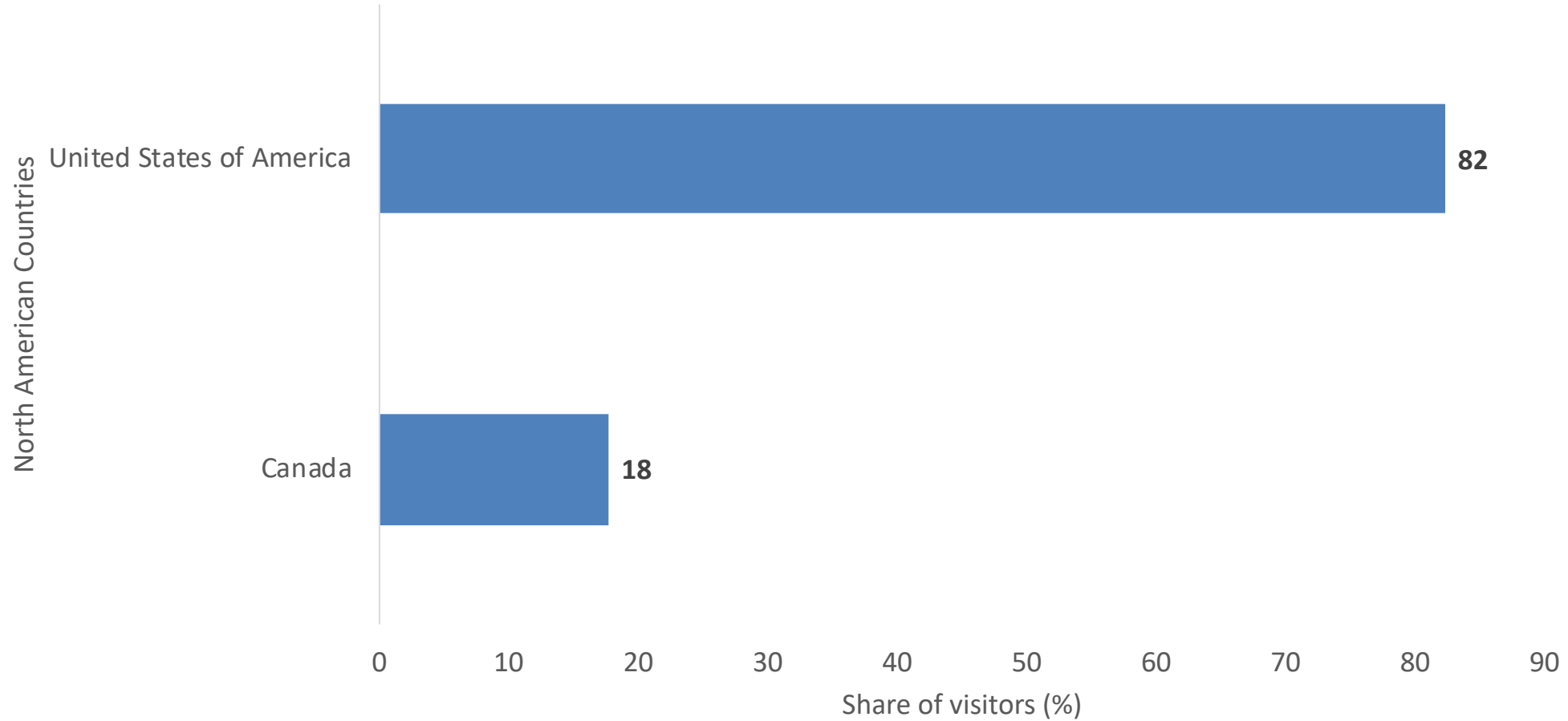
Long Haul Market – Europe

Europe



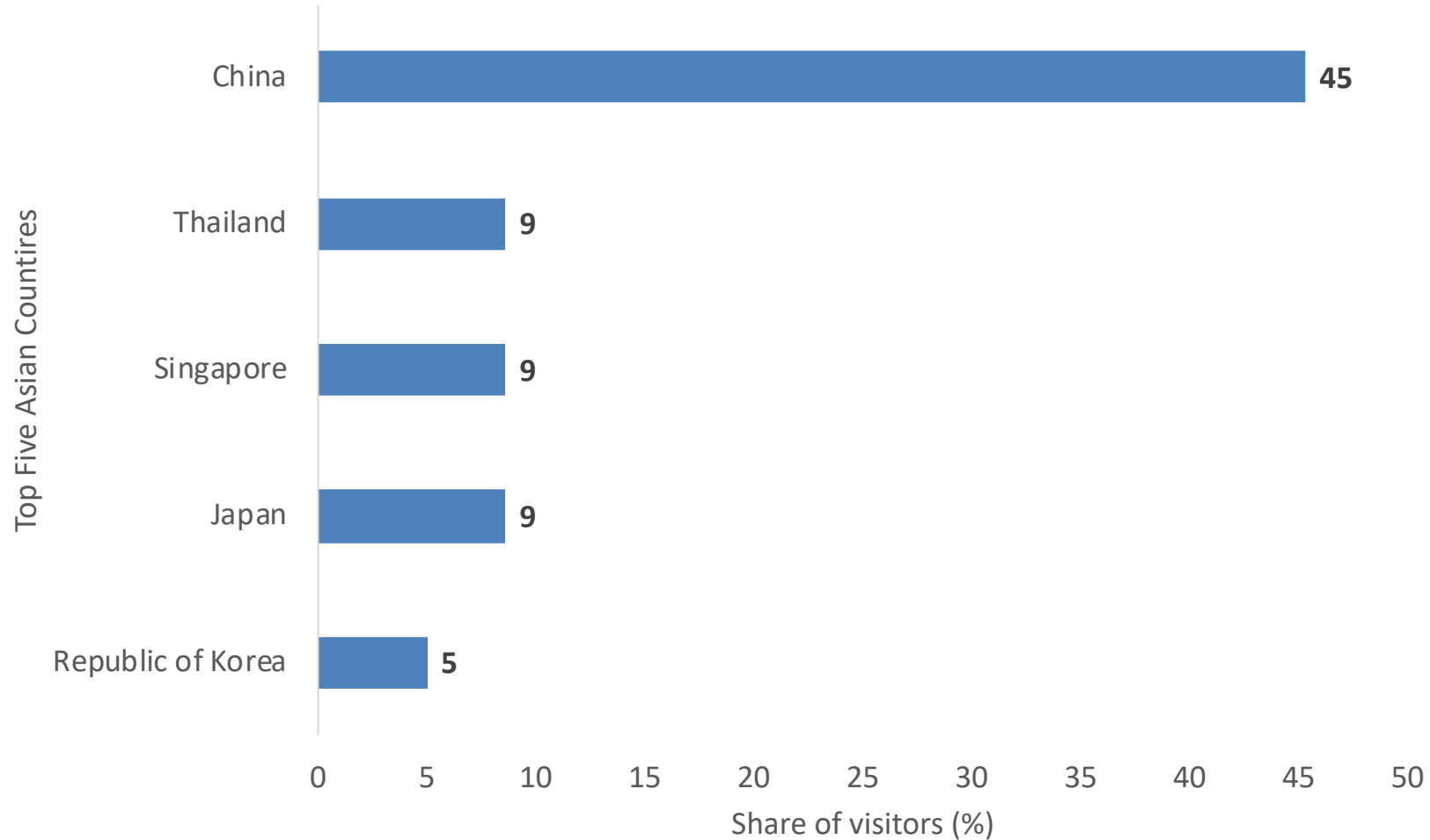
Long Haul Market – North America

North America

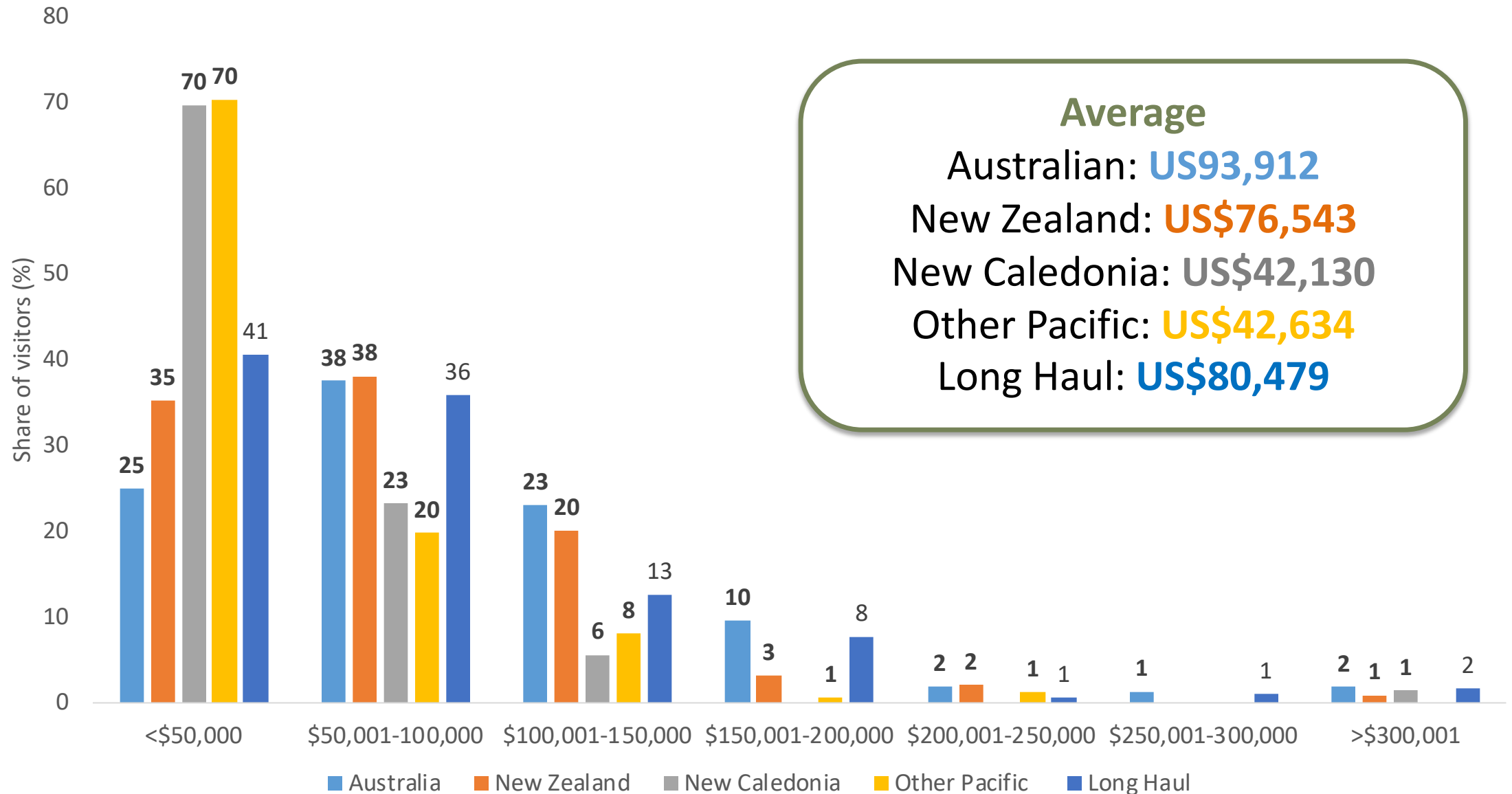


Long Haul Market – Top Countries

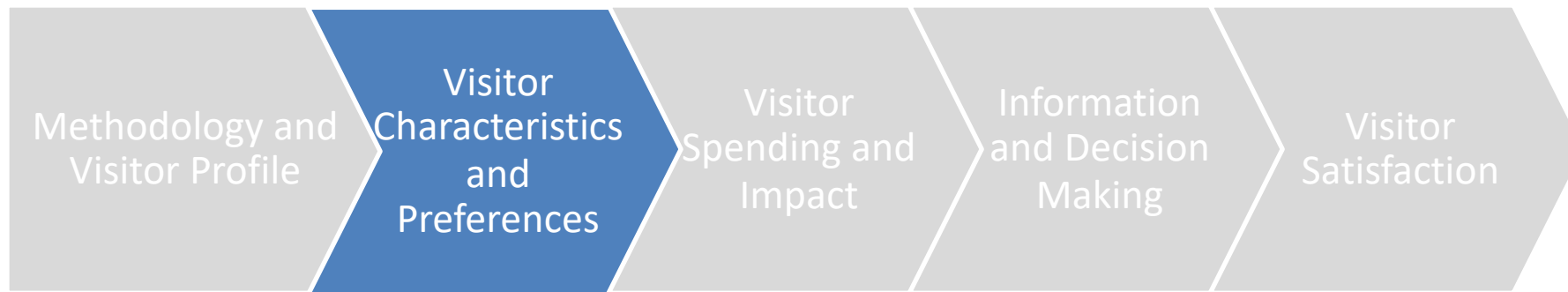
Asia



Annual Household Income



Presentation Structure



Visitor Characteristics – Summary



Airlines Used

56% Air Vanuatu
23% Virgin Australia
11% Aircalin
10% Qantas
7% Fiji Airlines



Length of Stay

8.1 Nights on average
61% Stayed up to 1 week



Previous Visits

57% First trip
22% 1 or 2 times



Travel Companions

20% Travel by themselves
80% Travel with others



Purpose of Visit

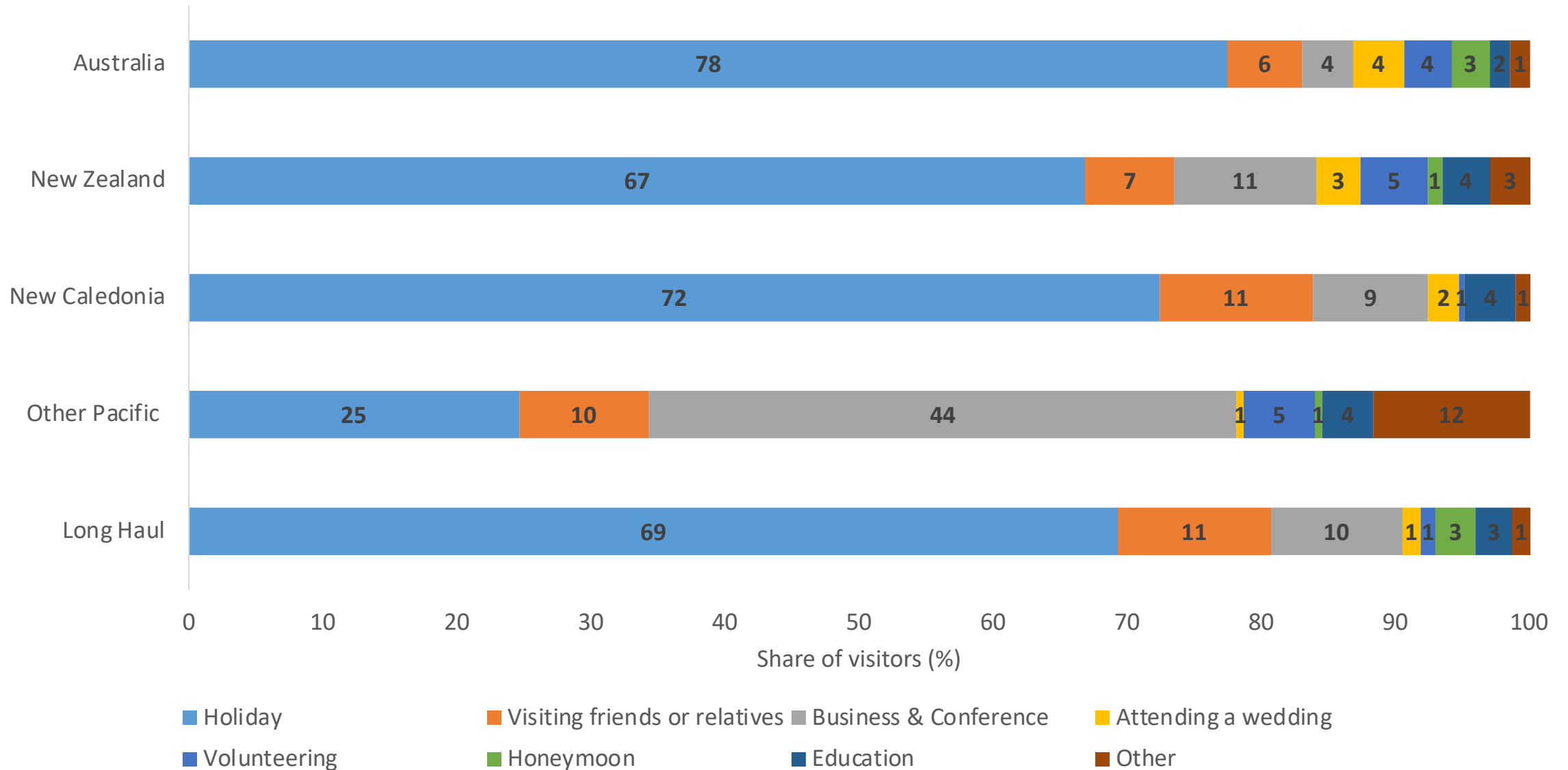
71% Holiday
9% Business/Conference
8% Visiting Friends/Family



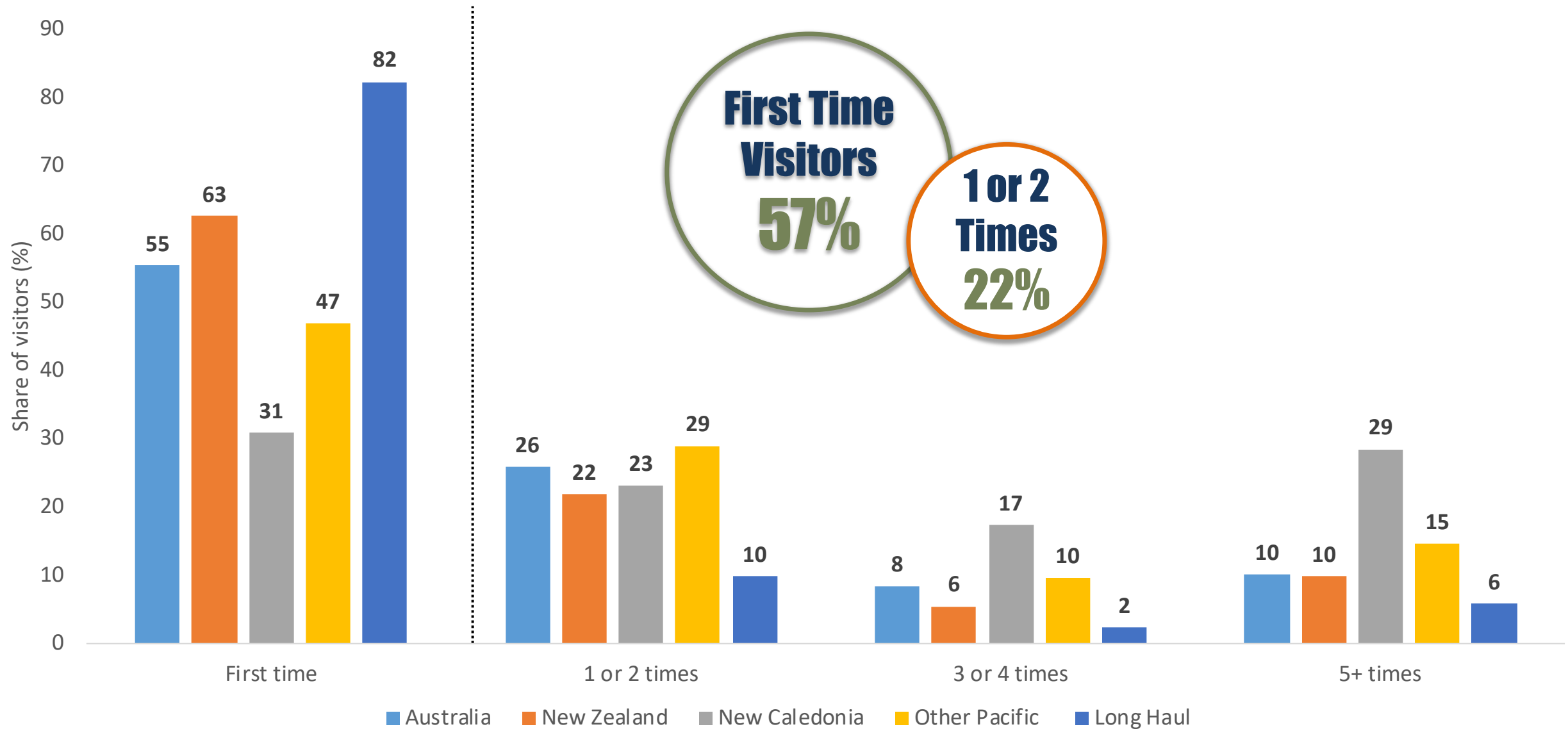
Islands Visited on Trip

96% Efate (Port Vila)
17% Tanna
16% Espiritu Santo

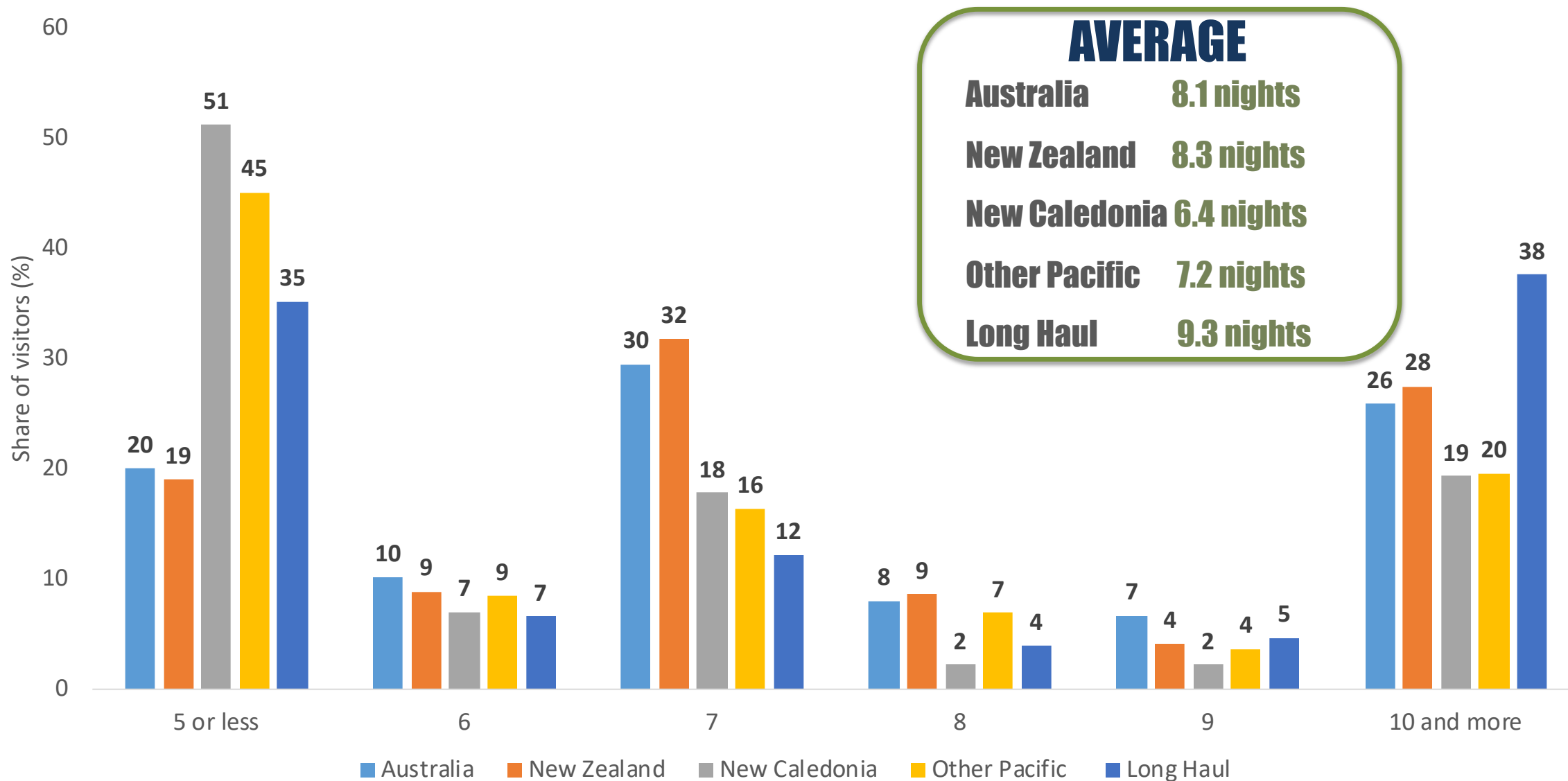
Main Purpose of Visit



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

56%/58%



11%/11%



7%/5%

**Others (Air New Zealand,
Solomon Airlines)**

6%/5%



23%/25%



10%/10%

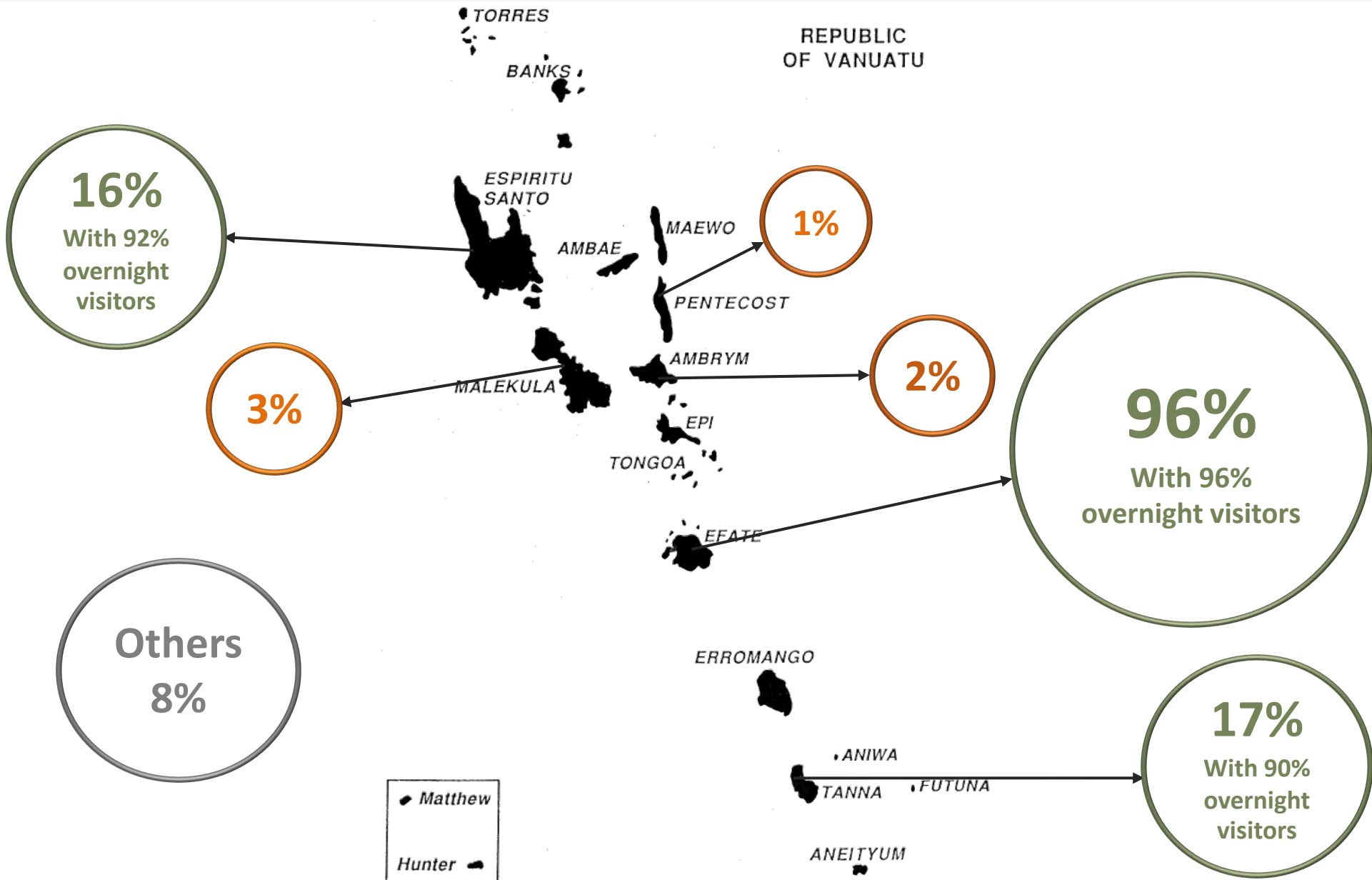


Fiji Airways and
Aircalin are more
commonly used
by visitors from
Pacific countries

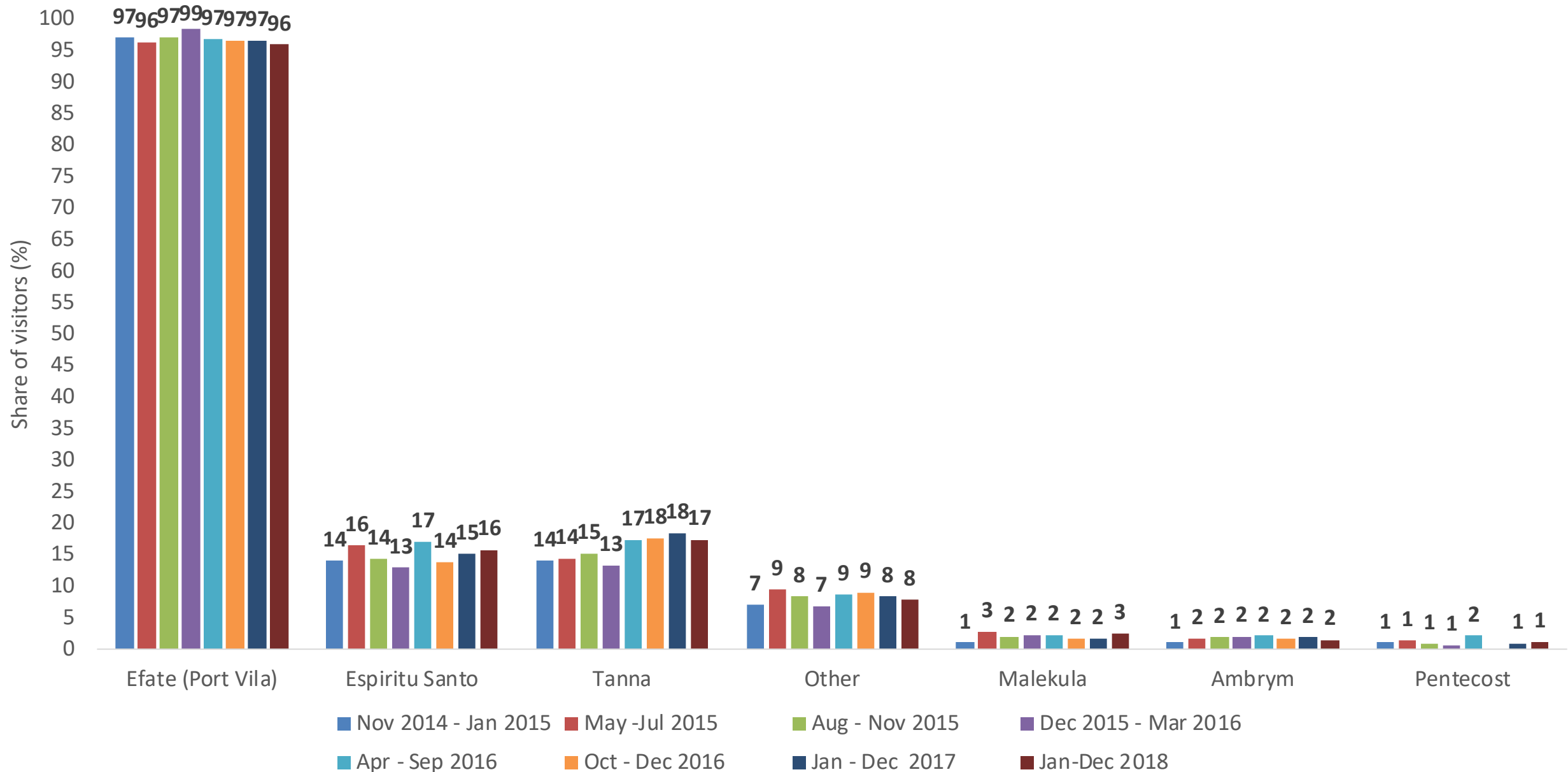
* Text is grey represents all visitors/green represents 'holiday' only

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

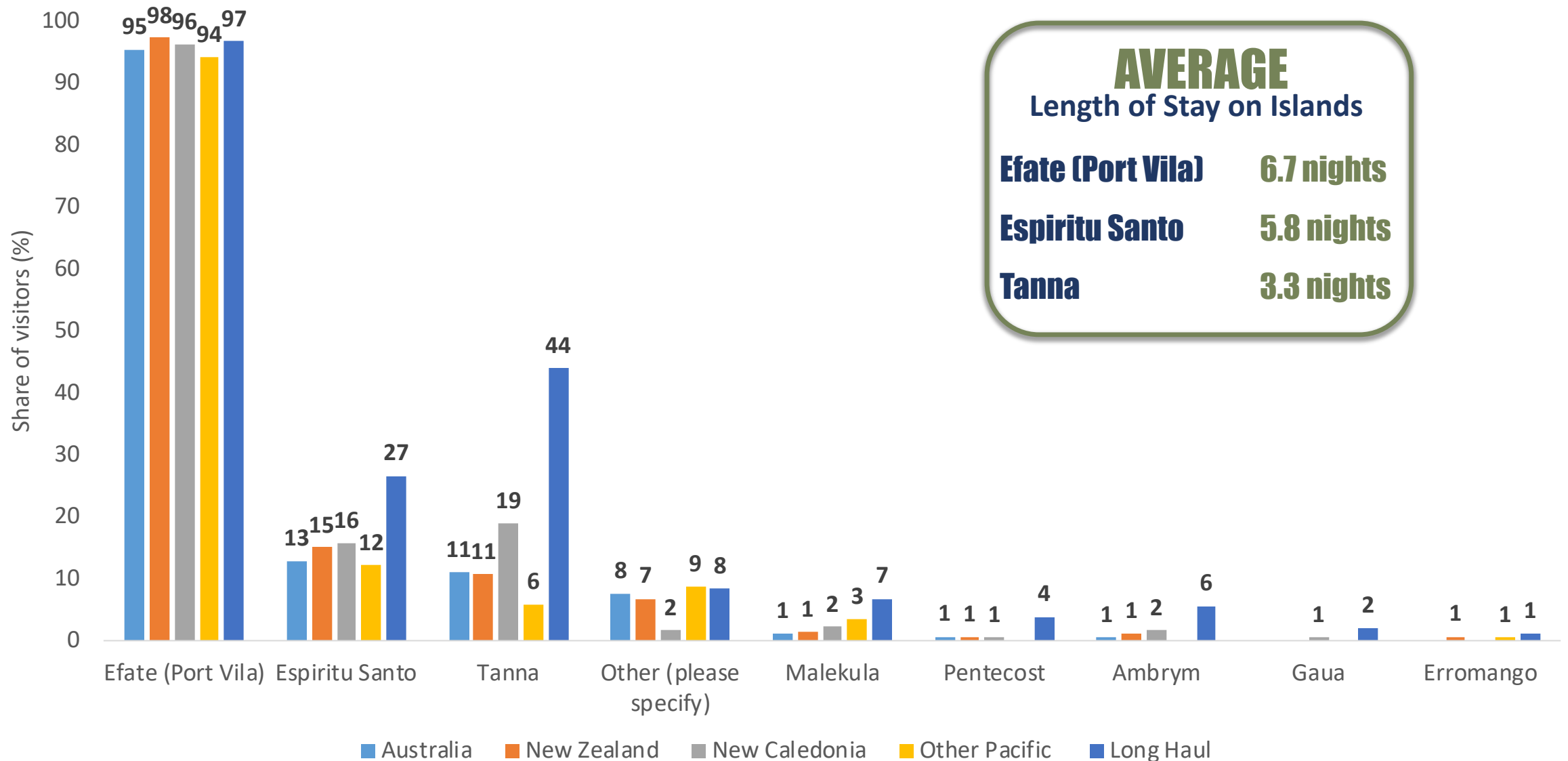
Islands Visited



Outer Islands Visited – Time Series



Outer Islands Visited – Country of Origin



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

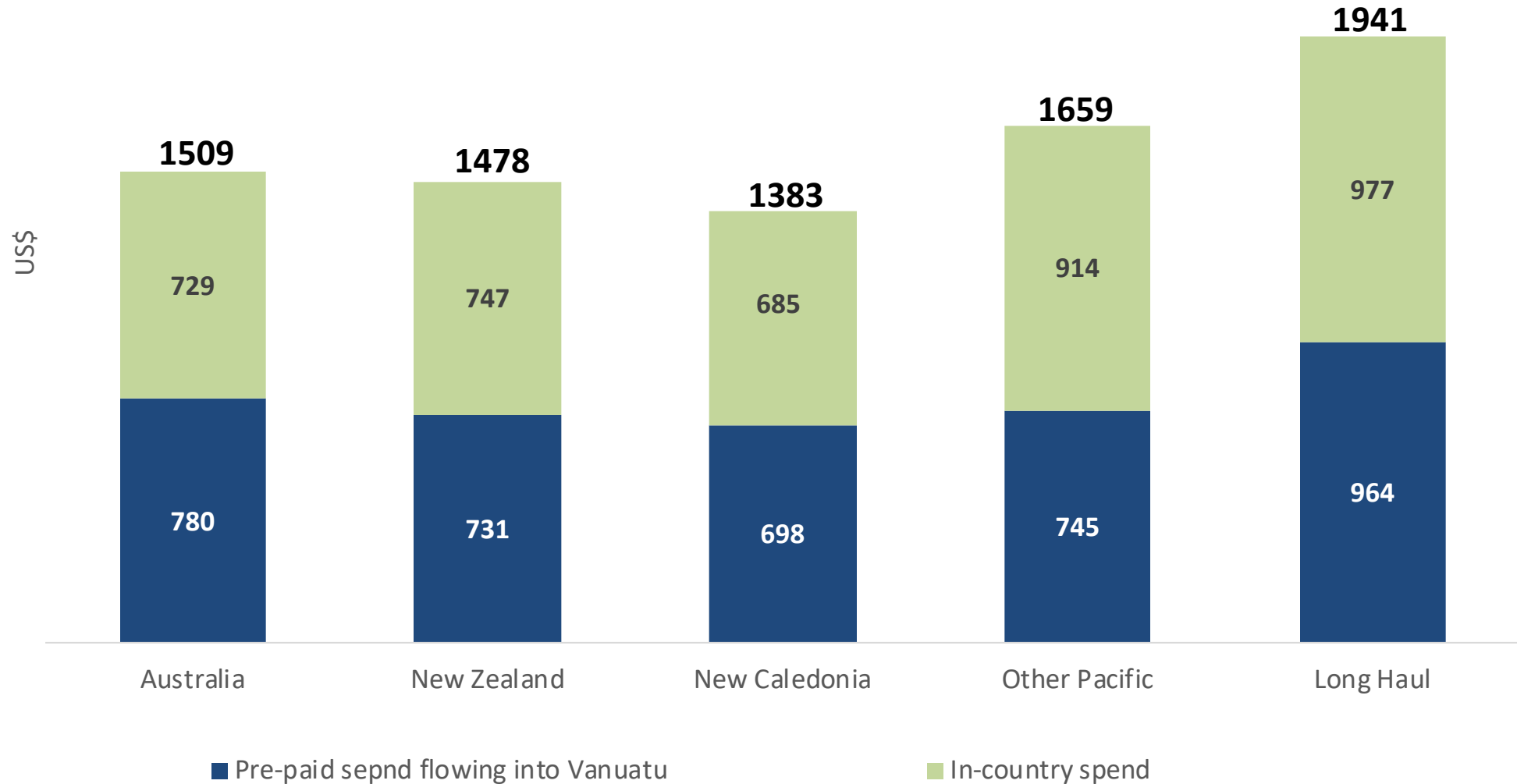
Note: 31+ days as outliers were removed for length of stay analysis

Presentation Structure



Expenditure by Market

PER PERSON PER VISIT

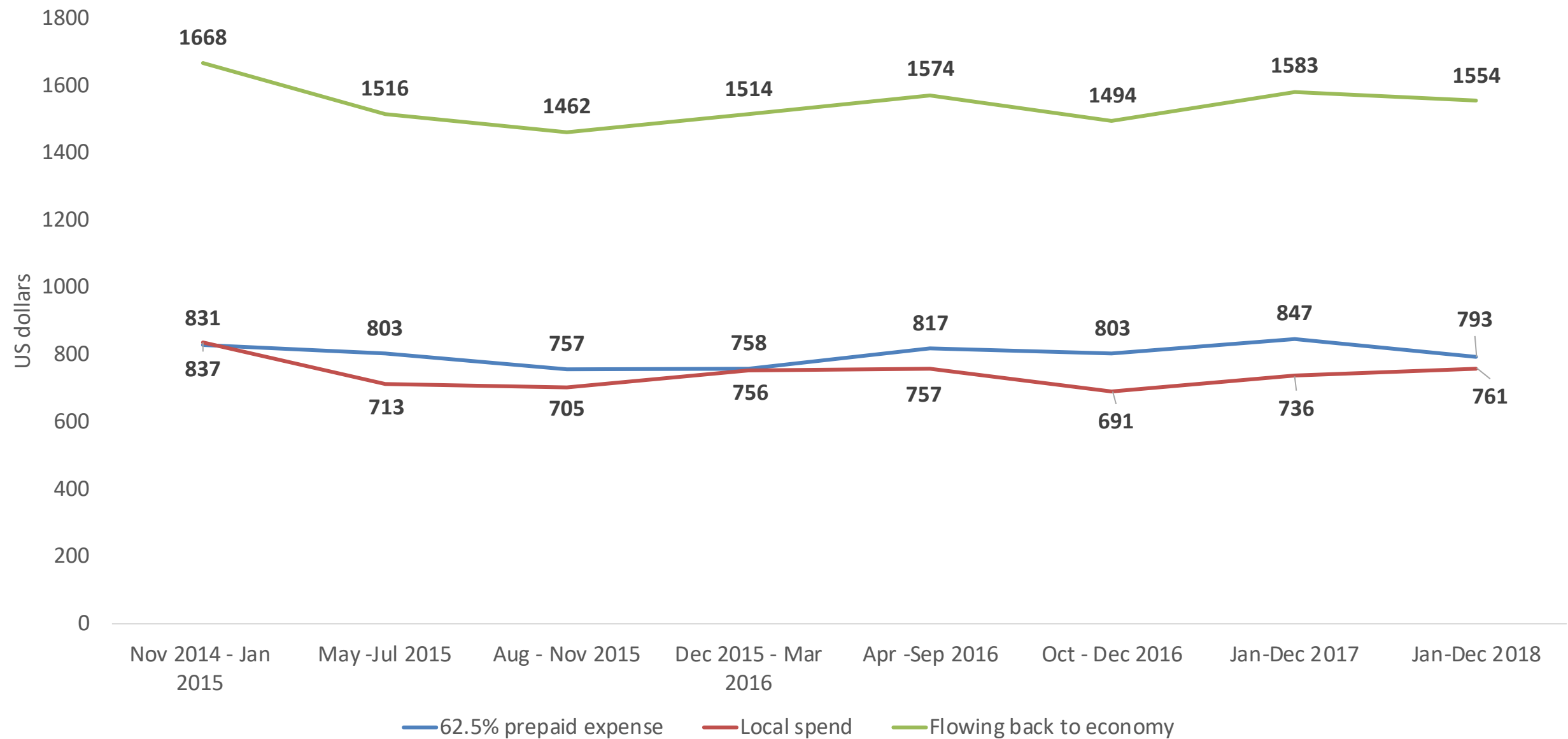


Note: the high spend for long haul is driven by the higher length of stay.

Expenditure by Market

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
Average Spend Prior to arrival						
Per Person - Whole Trip	\$1,248	\$1,169	\$1,117	\$1,192	\$1,543	\$1,269
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$780	\$731	\$698	\$745	\$964	\$793
Per Person per Day	\$96	\$88	\$109	\$103	\$104	\$98
Length of stay	8.1 nights	8.3 nights	6.4 nights	7.2 nights	9.3 nights	8.1 nights
Average Spend while in Vanuatu						
Per Person - Whole Trip	\$729	\$747	\$685	\$914	\$977	\$761
Per Person per Day	\$90	\$90	\$107	\$127	\$105	\$94
Total spend flowing into Vanuatu economy – Whole Trip	\$1,509	\$1,478	\$1,383	\$1,659	\$1,941	\$1,554
Total spend flowing into Vanuatu economy – Per Day	\$186	\$178	\$216	\$230	\$209	\$192

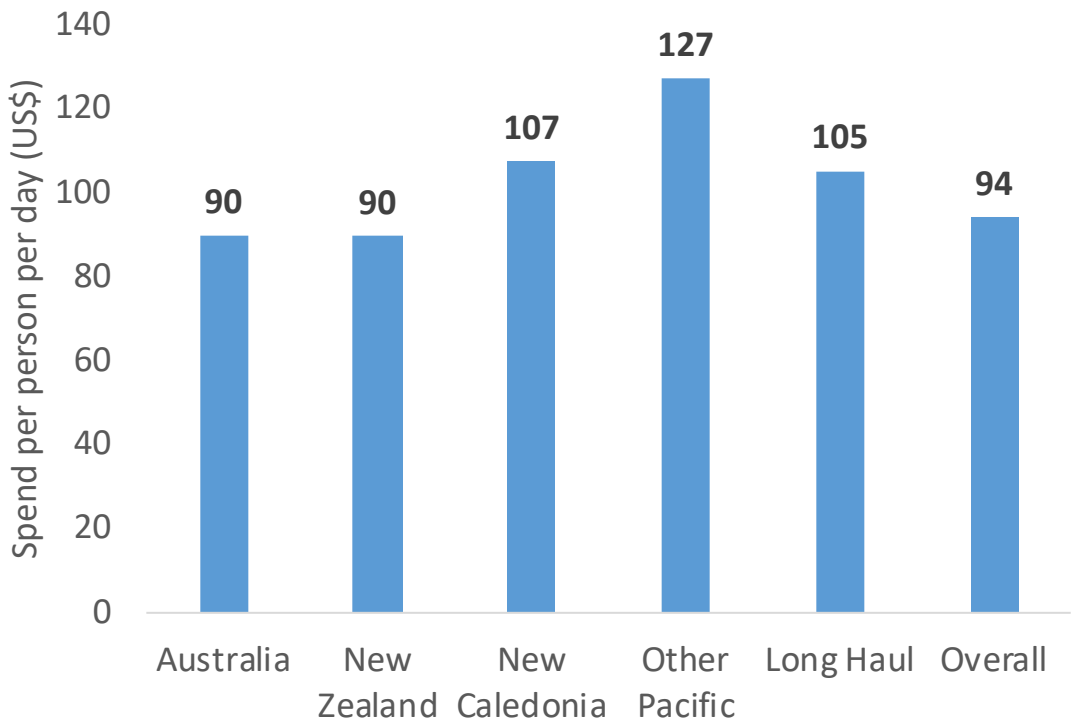
Overall Visitor Spend Time Series Trends



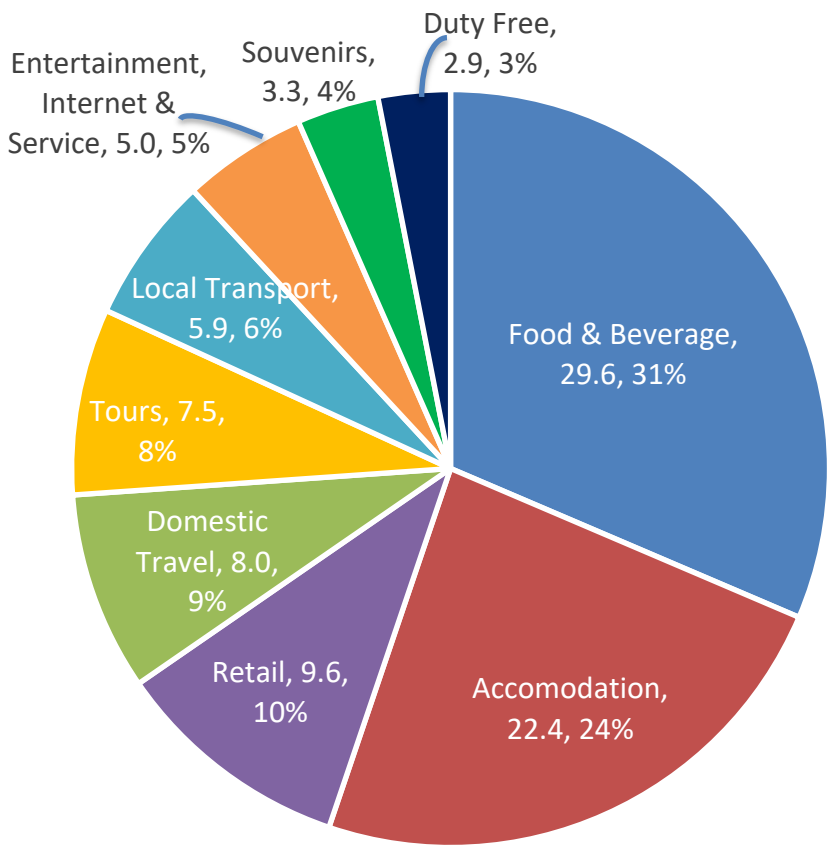
Average Spend while in Vanuatu per day

PER PERSON PER DAY

By Market

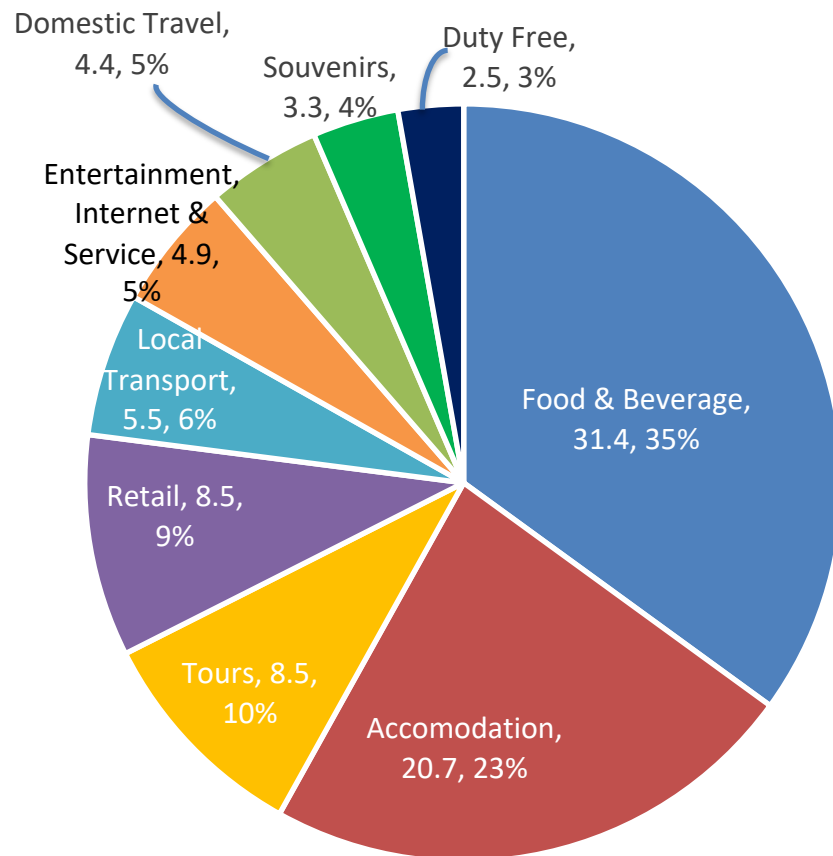


Overall - \$94 per day

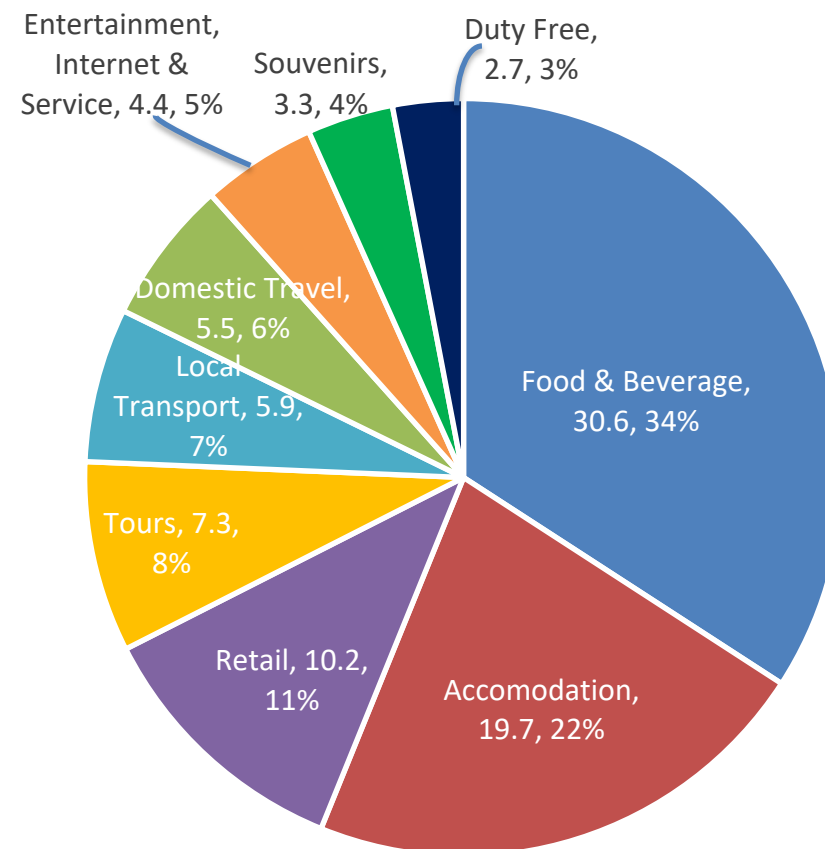


Average Spend while in Vanuatu by Market

Australia - \$90 per day

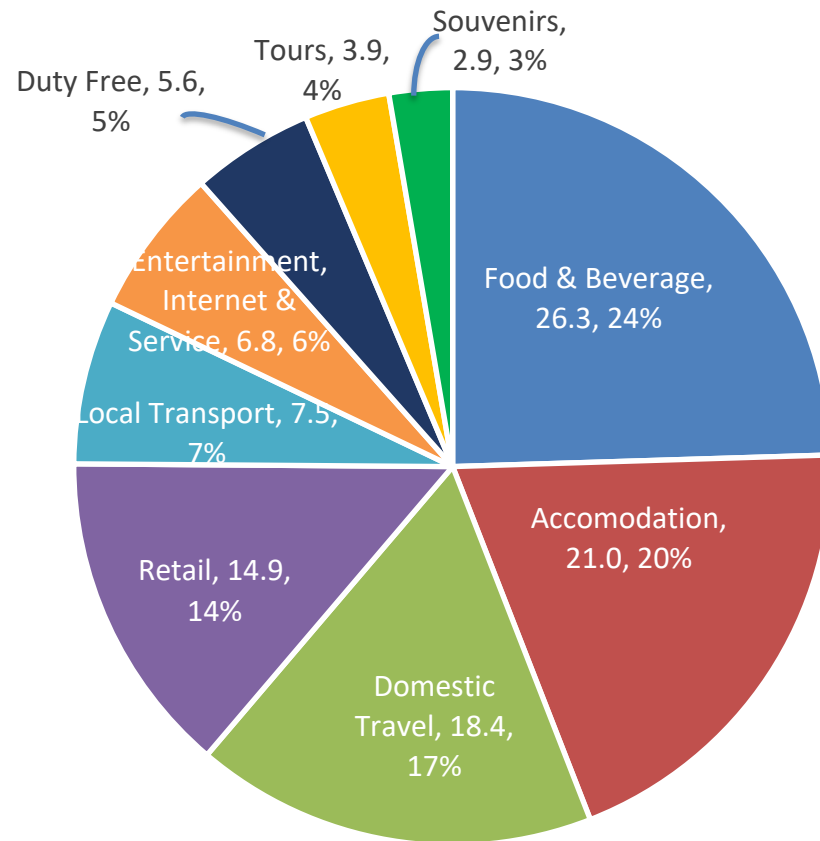


New Zealand - \$90 per day

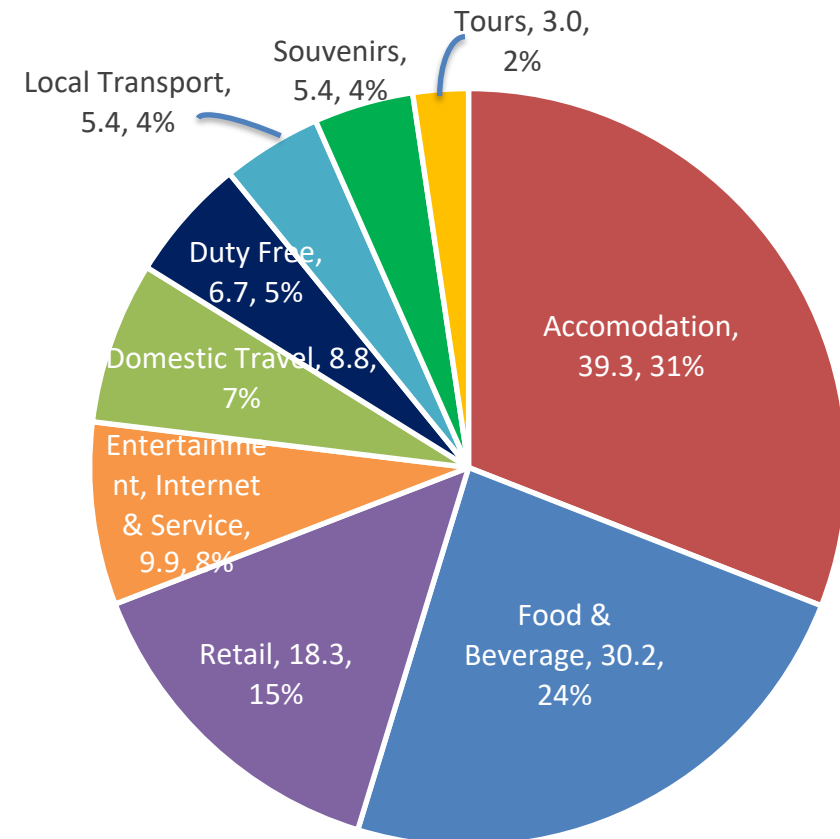


Average Spend while in Vanuatu by Market

New Caledonia - \$107 per day

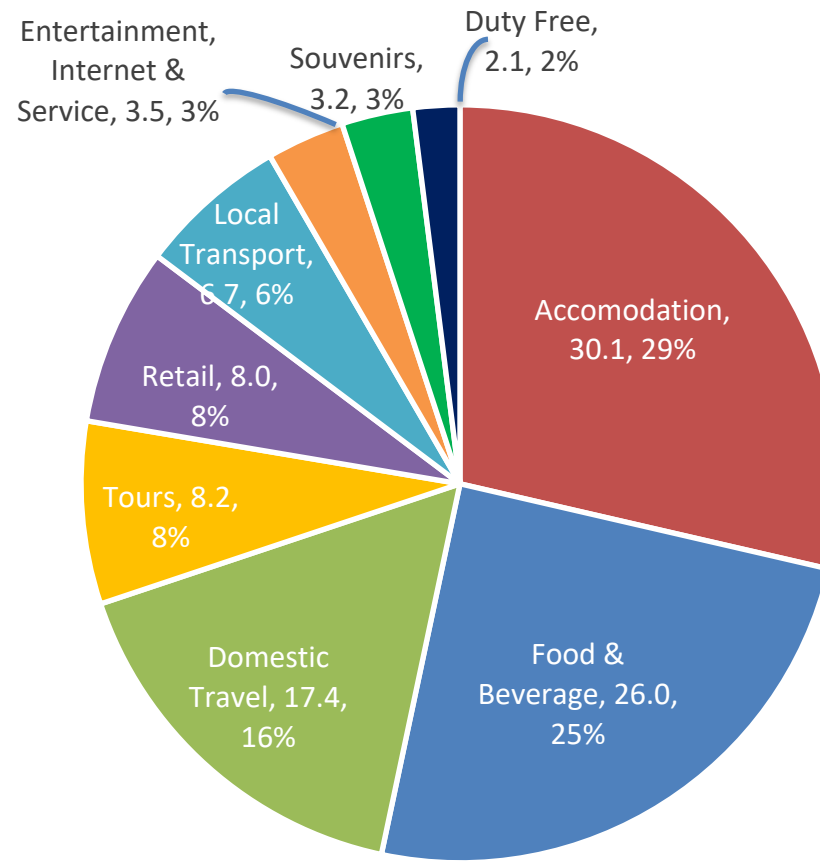


Other Pacific - \$127 per day



Average Spend while in Vanuatu by Market

Long Haul - \$105 per day



Visitor Expenditure – Per Person and Total

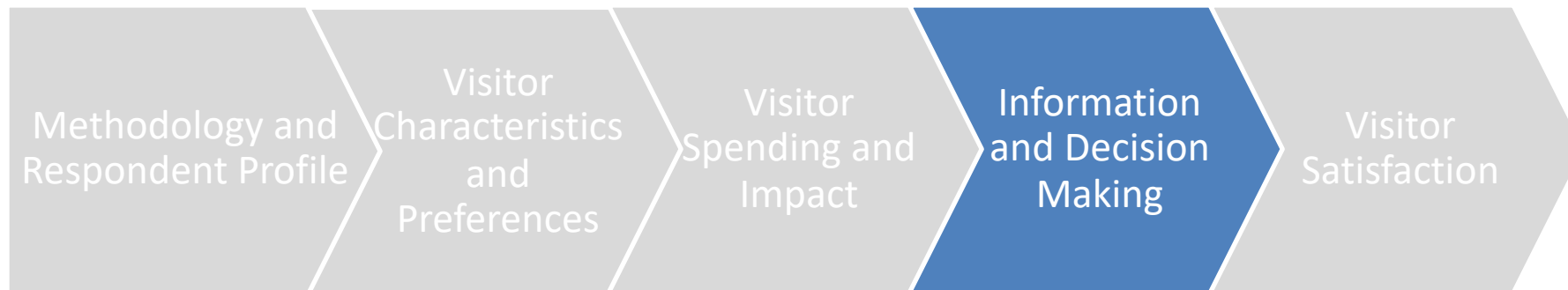
	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$98 Vt 10,779		US\$94 Vt 10,348		US\$192 Vt 21,127
Whole Trip	US\$793 Vt 87,310		US\$791 Vt 83,818		US\$1,554 Vt 171,128

Direct economic impact on Vanuatu for Jan-Dec 2018

US\$179.9 million / Vt 19.8 billion in total

US\$15.0 million/ Vt 1.65 billion per month

Presentation Structure



Information Sources and Decision Making

How did you find out about Vanuatu?



40%	Friends and Family
33%	Previous Visits
20%	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
24%	Through a travel agent store
12%	Travel arrangements were made by others
2%	Other



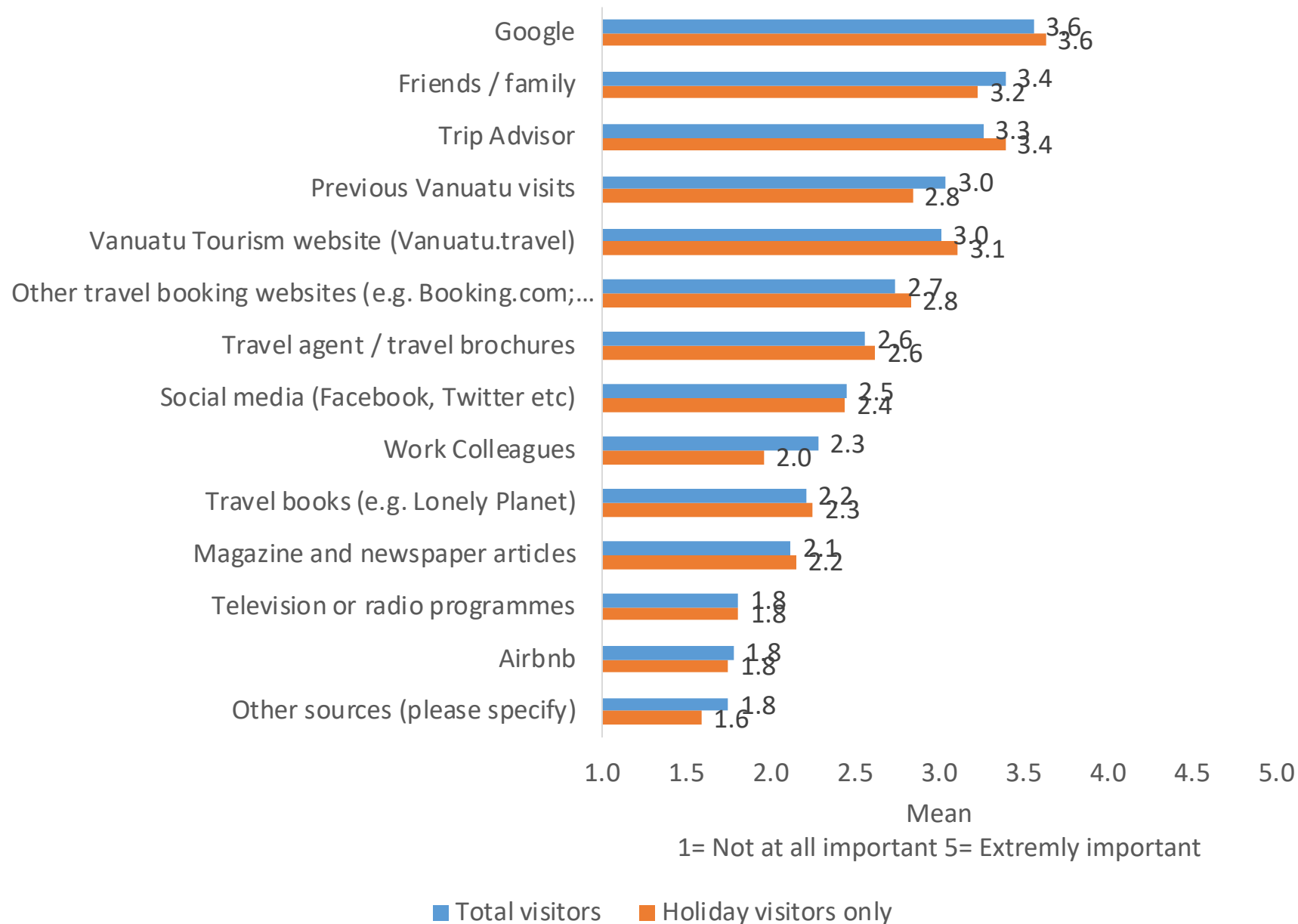
Importance of information Sources for Planning

3.6/5	Google
3.4/5	Friends and Family
3.3/5	Trip Advisor
3.0/5	Previous Visits

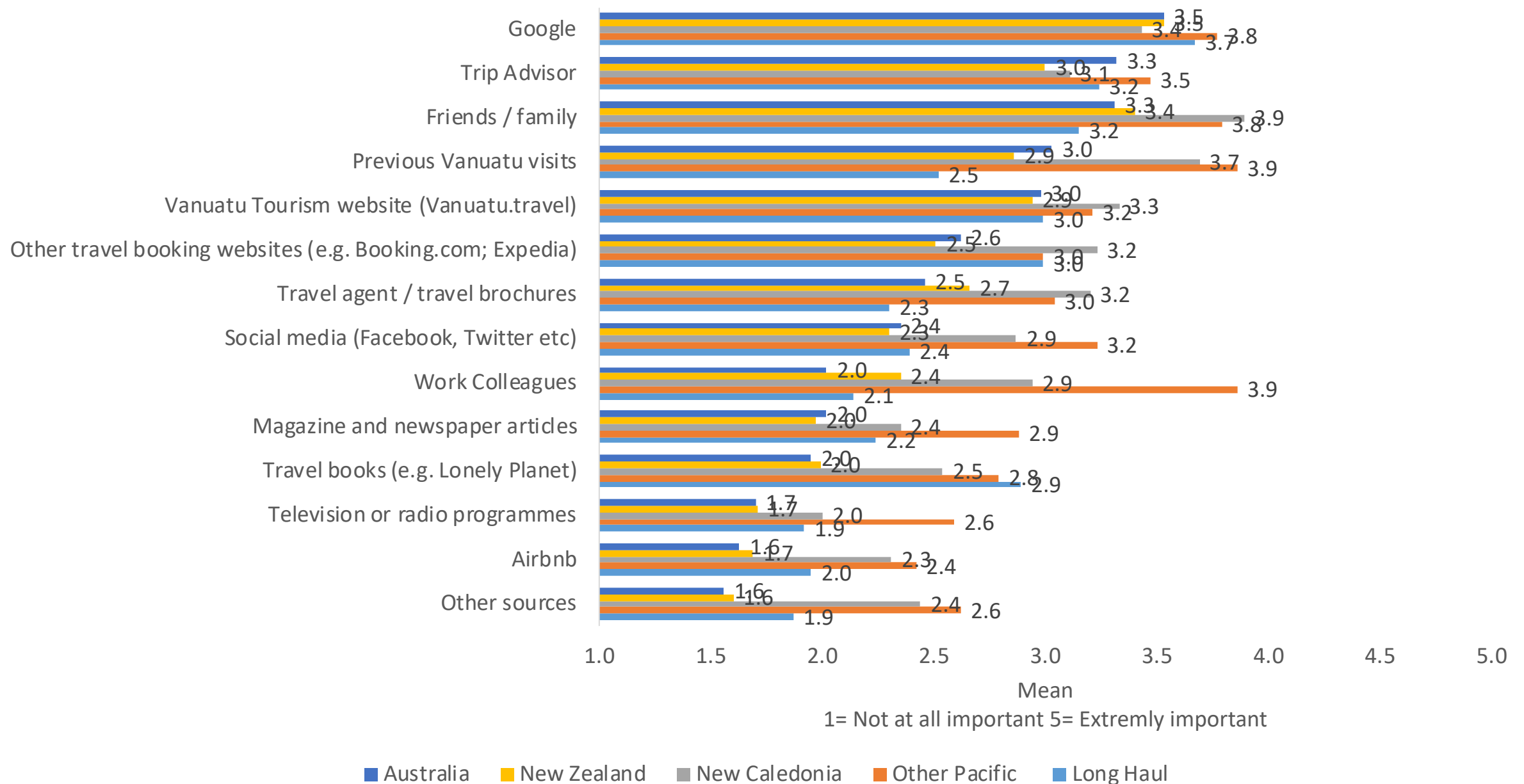
Influences on the decision to choose Vanuatu

Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Experience of a different culture 3.7	Beaches and swimming 3.7	Range of natural activities 3.6	Range of outdoor activities and experiences 3.5
New Zealand	Experience of a different culture 3.6	Beaches and swimming 3.5	Quiet and relaxing atmosphere 3.4	Snorkelling 3.3
New Caledonia	Affordable 3.7	Range of natural attractions 3.6	Proximity / Ease of travel 3.6	Quiet and relaxing atmosphere 3.6
Other Pacific	Business or conference 3.4	Proximity / Ease of travel 3.4	Experience of a different culture 3.3	Affordable 3.2
Long Haul	Experience of a different culture 4.0	Range of natural attractions 3.6	Beaches and swimming 3.4	Volcanos 3.2

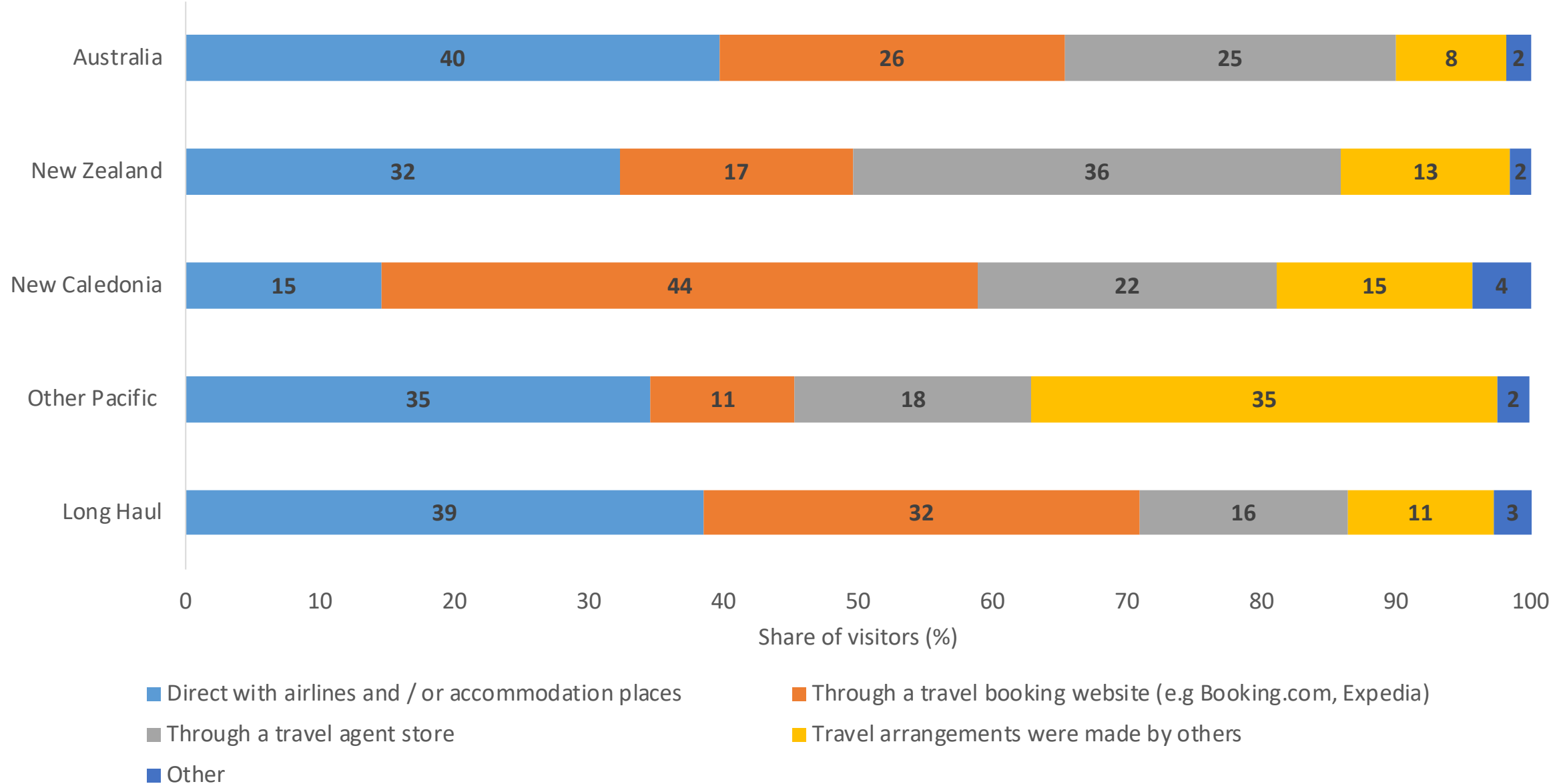
Importance of Sources Used for Planning – Holiday



Importance of Sources Used for Planning – Market

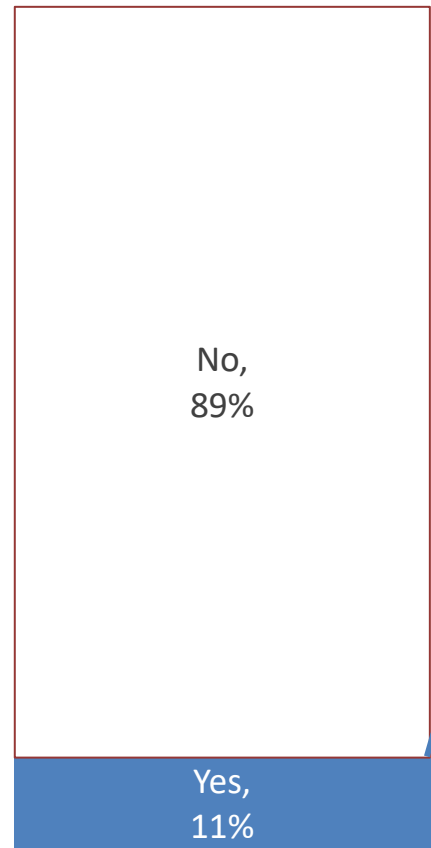


Travel Purchasing Behaviour by Market

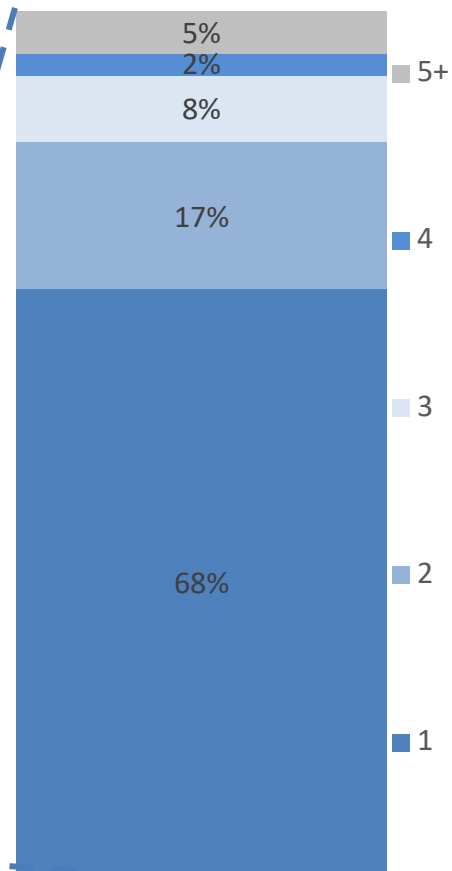


Cruise visits to Vanuatu for holiday visitors only

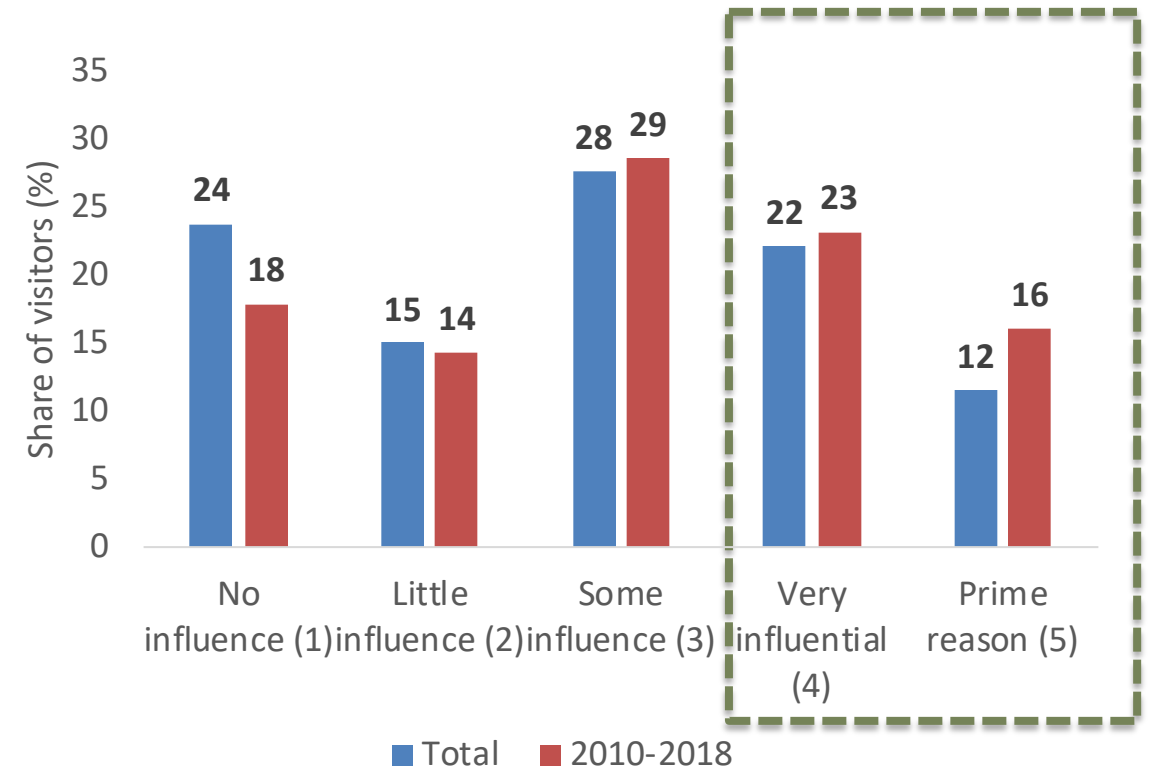
Been on a cruise to Vanuatu before?



If Yes, how many times?



Did cruising before influence your decision to come back?



Presentation Structure



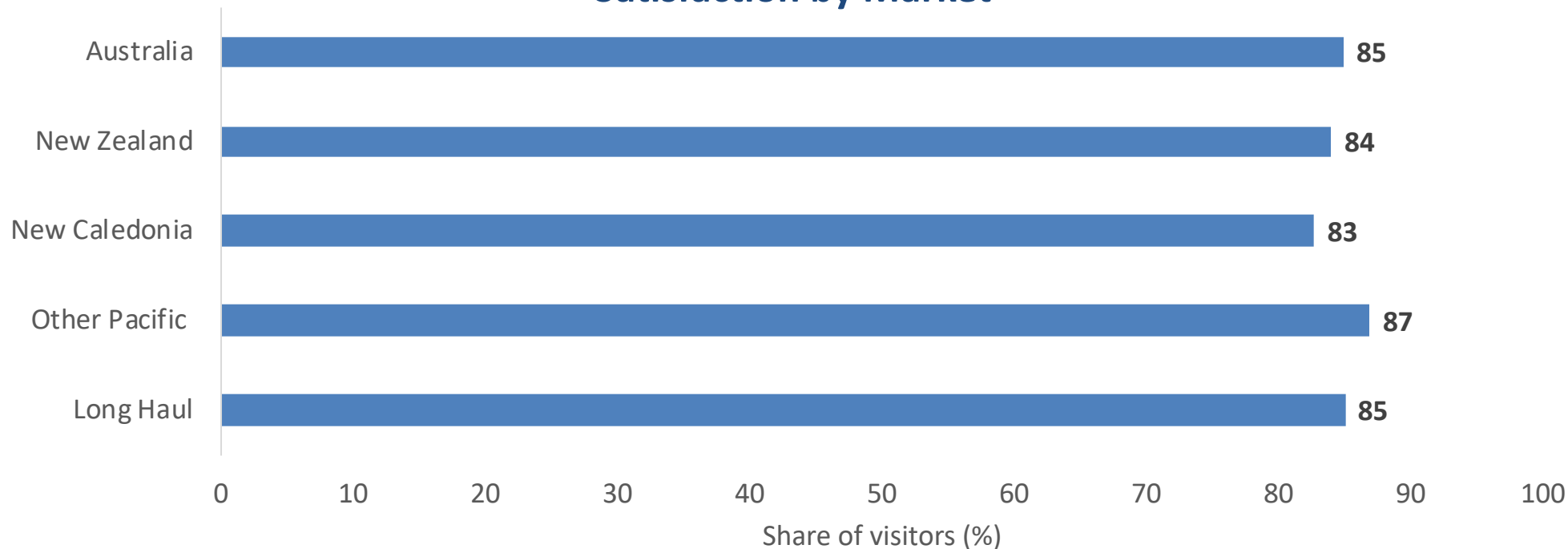
Visitor Satisfaction

Overall Satisfaction*

85% Total visitors satisfied

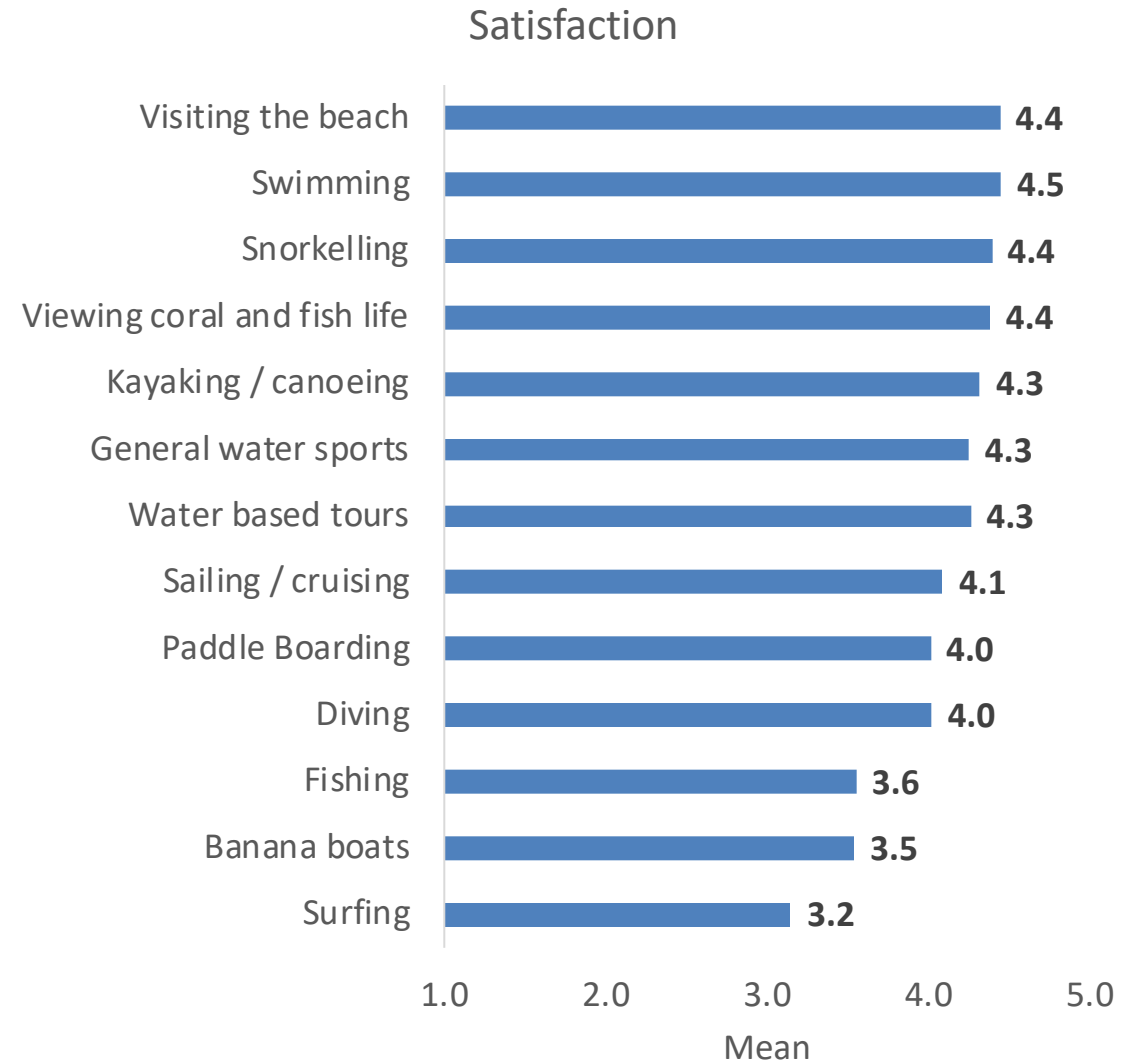
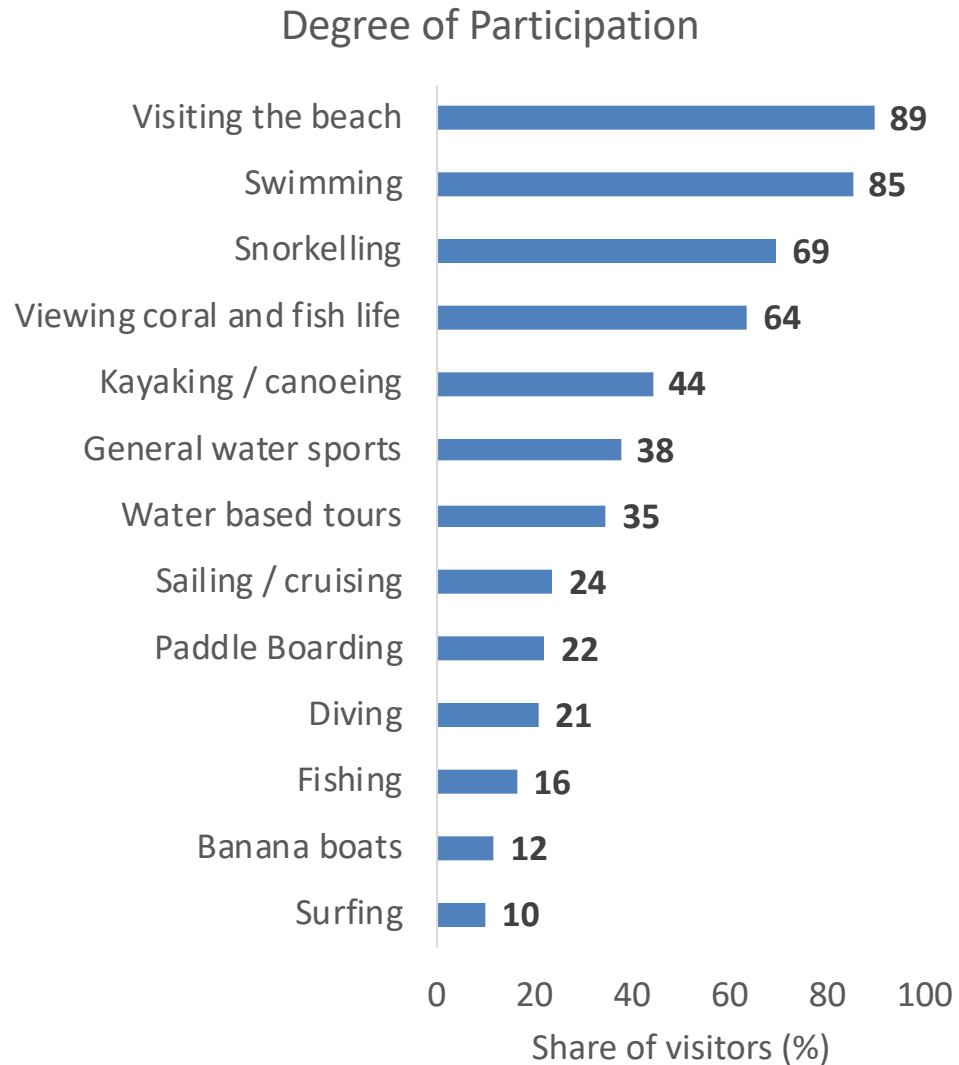
84% Holiday visitors satisfied

Satisfaction by Market



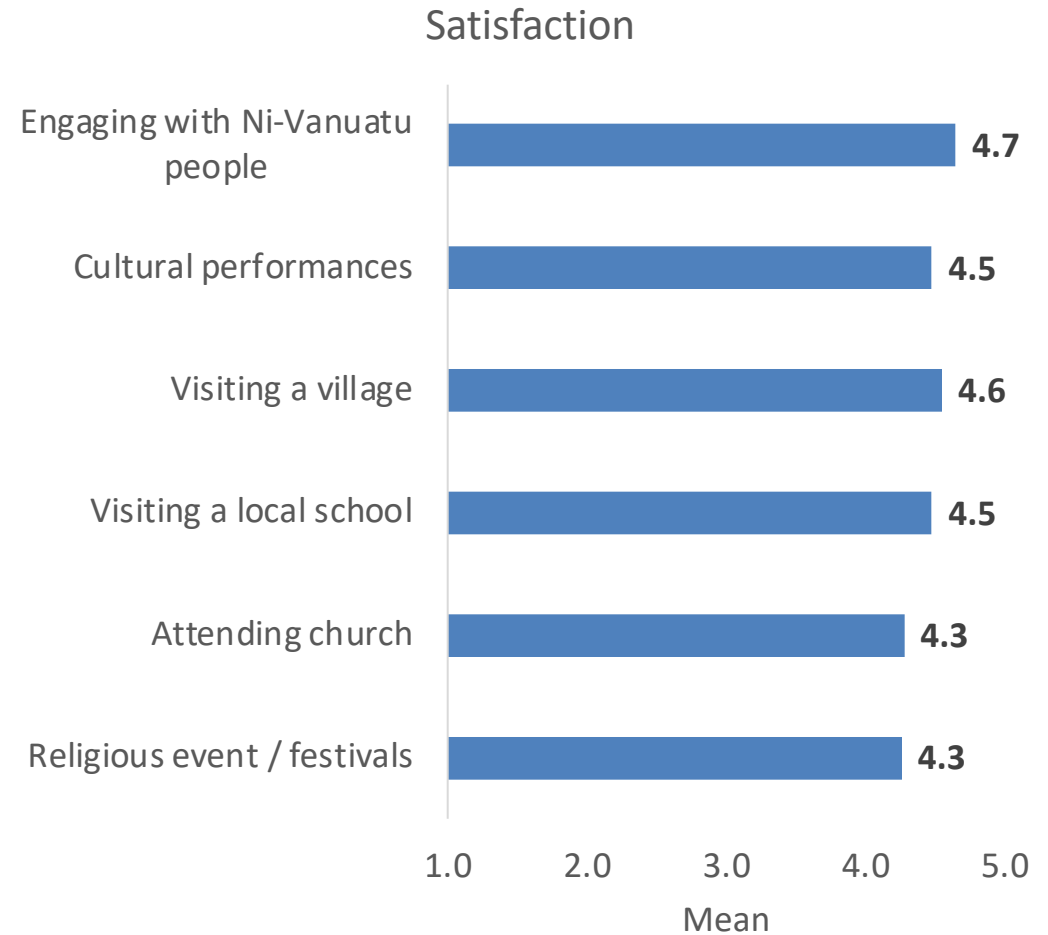
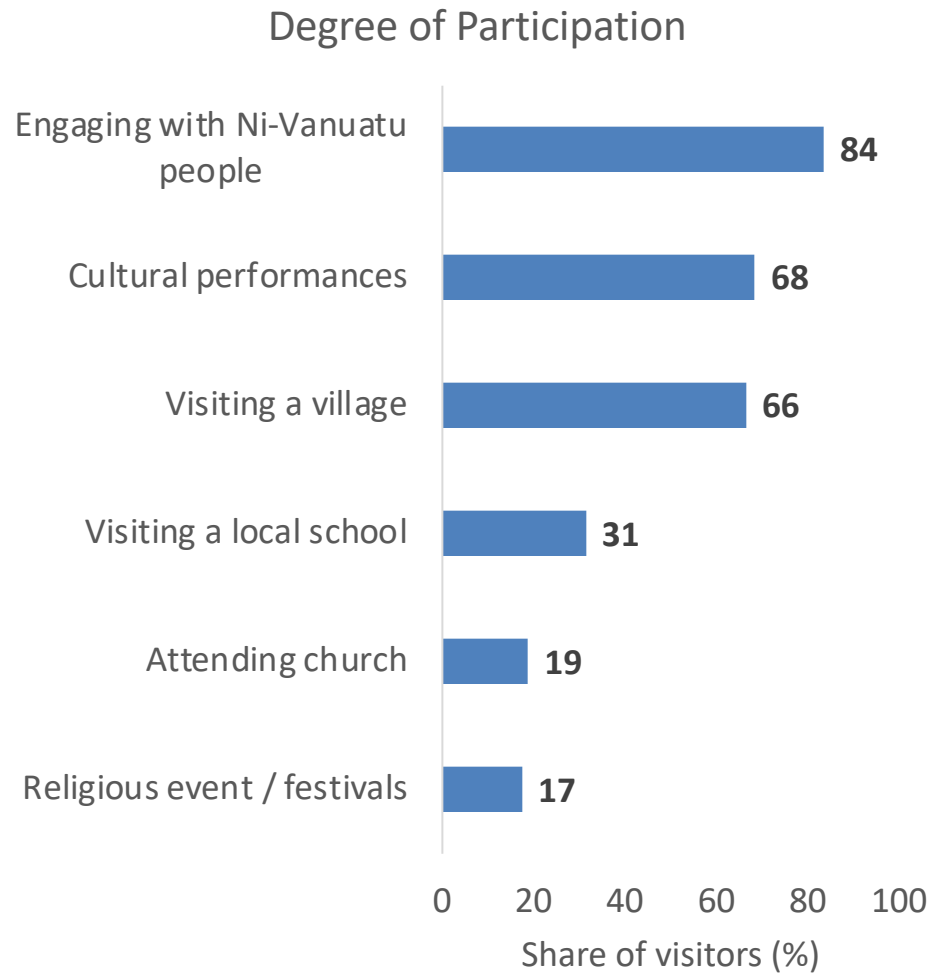
** Satisfied includes respondents who answered 'satisfied' or 'very satisfied'*

Water Based Activities



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

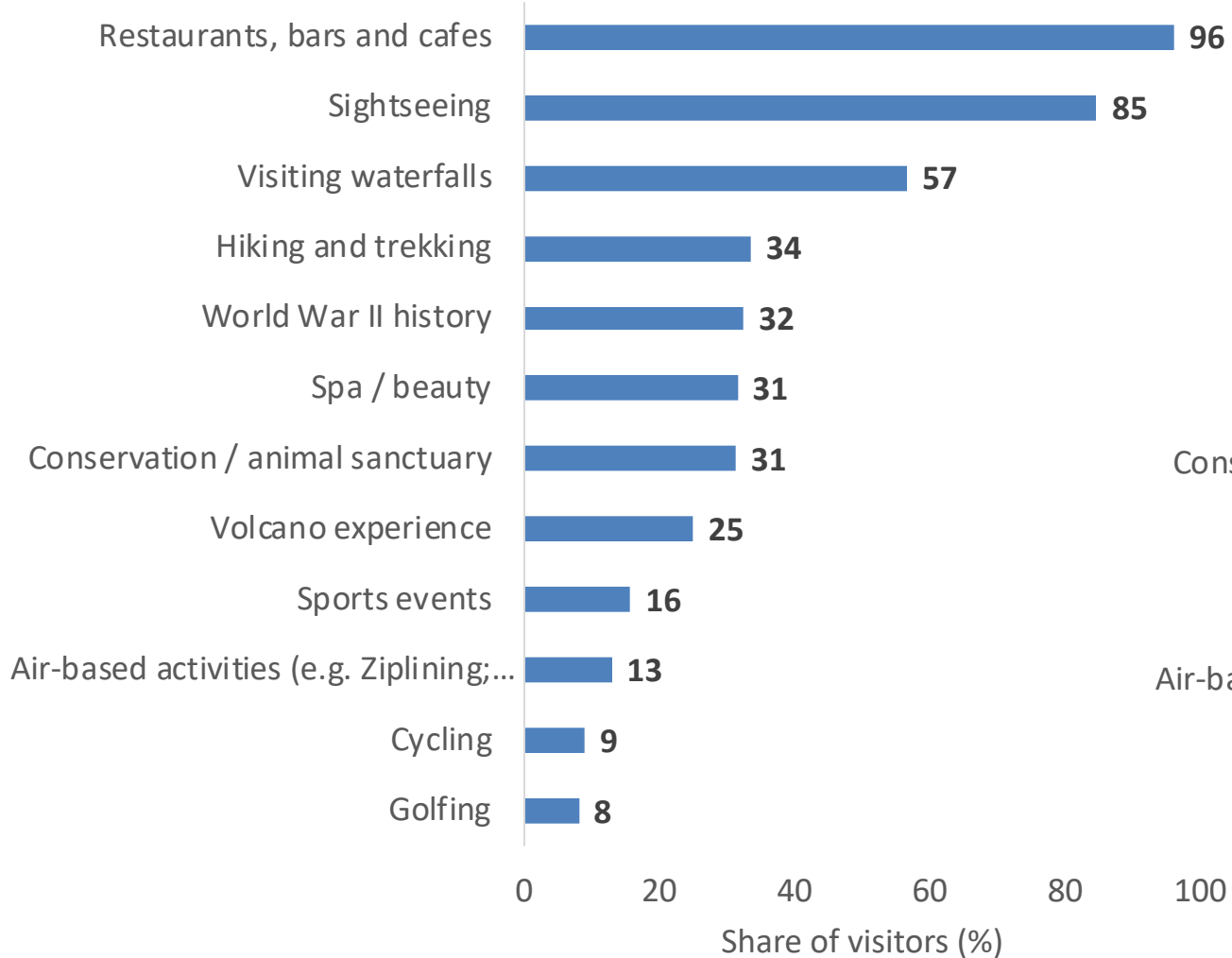
Cultural Interaction Activities



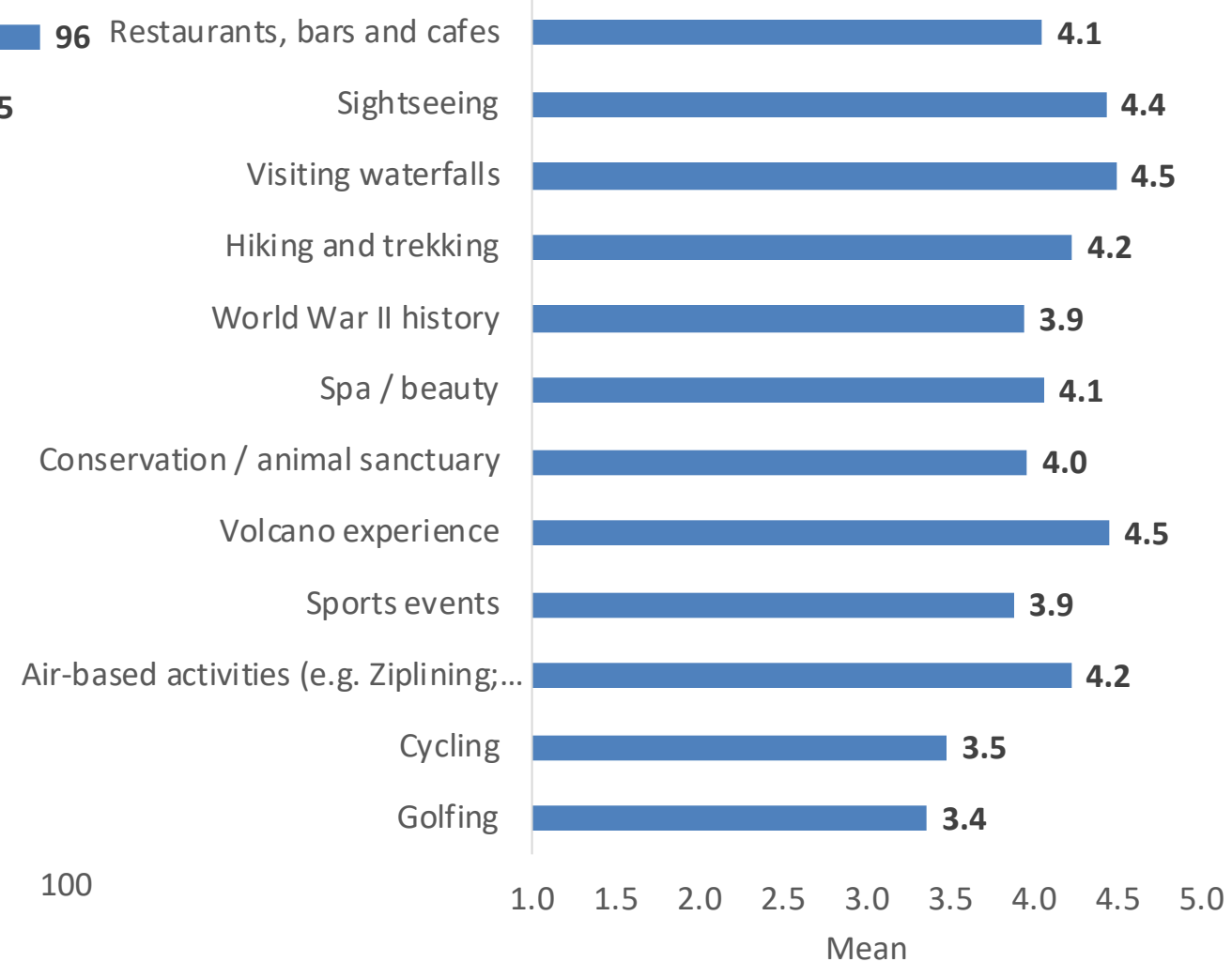
Note: Multiple responses, therefore total does not add up to 100%

Land Based Activities and Touring

Degree of Participation



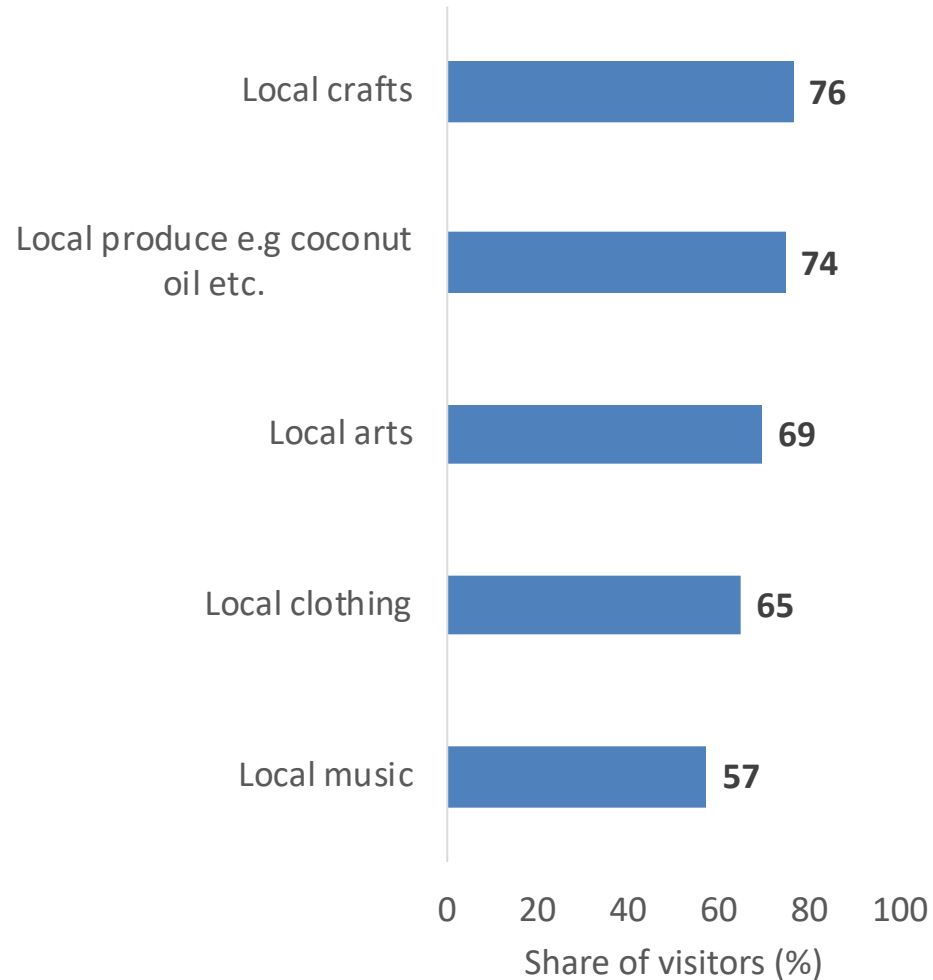
Satisfaction



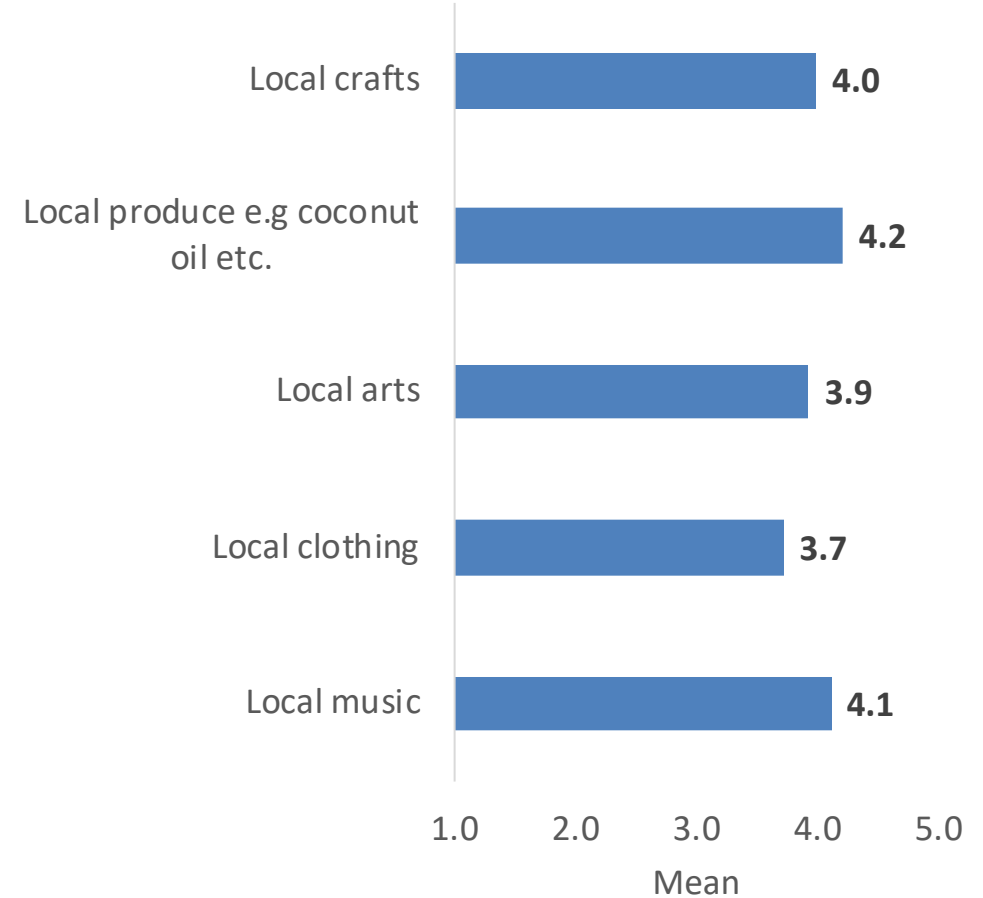
Note: Multiple responses, therefore total does not add up to 100%

Shopping

Degree of Participation

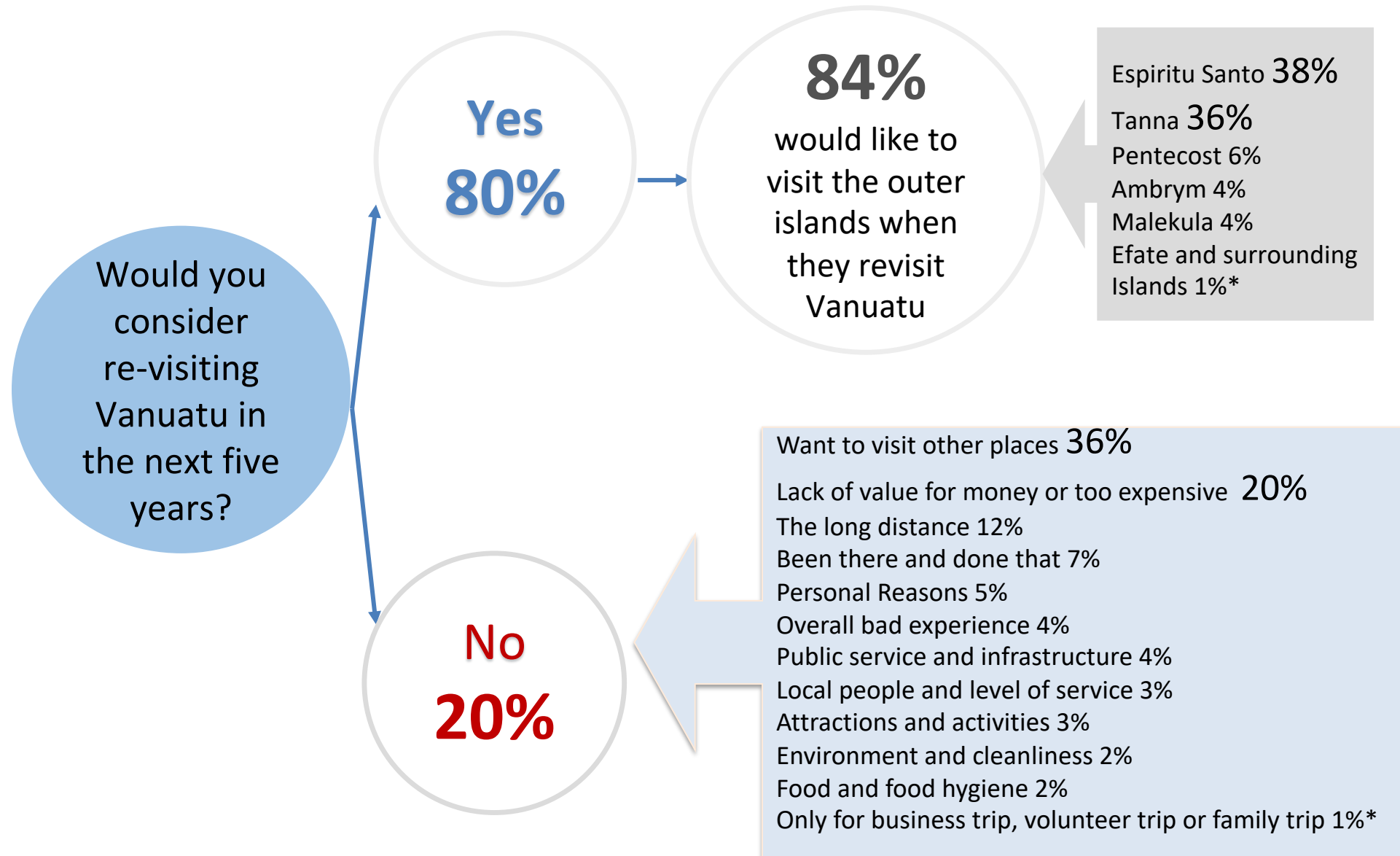


Satisfaction



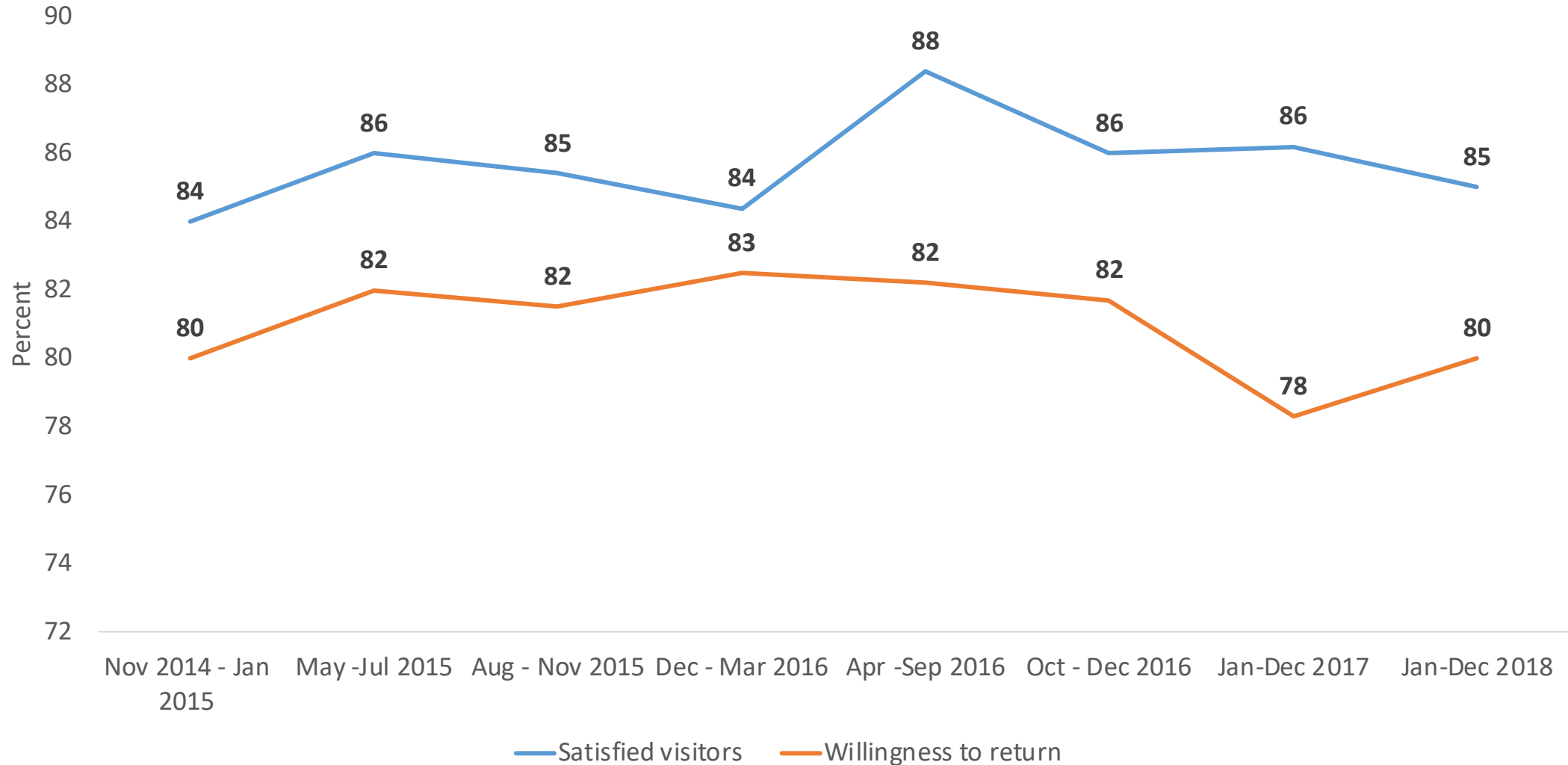
Note: Multiple responses, therefore total does not add up to 100%

Willingness to Return



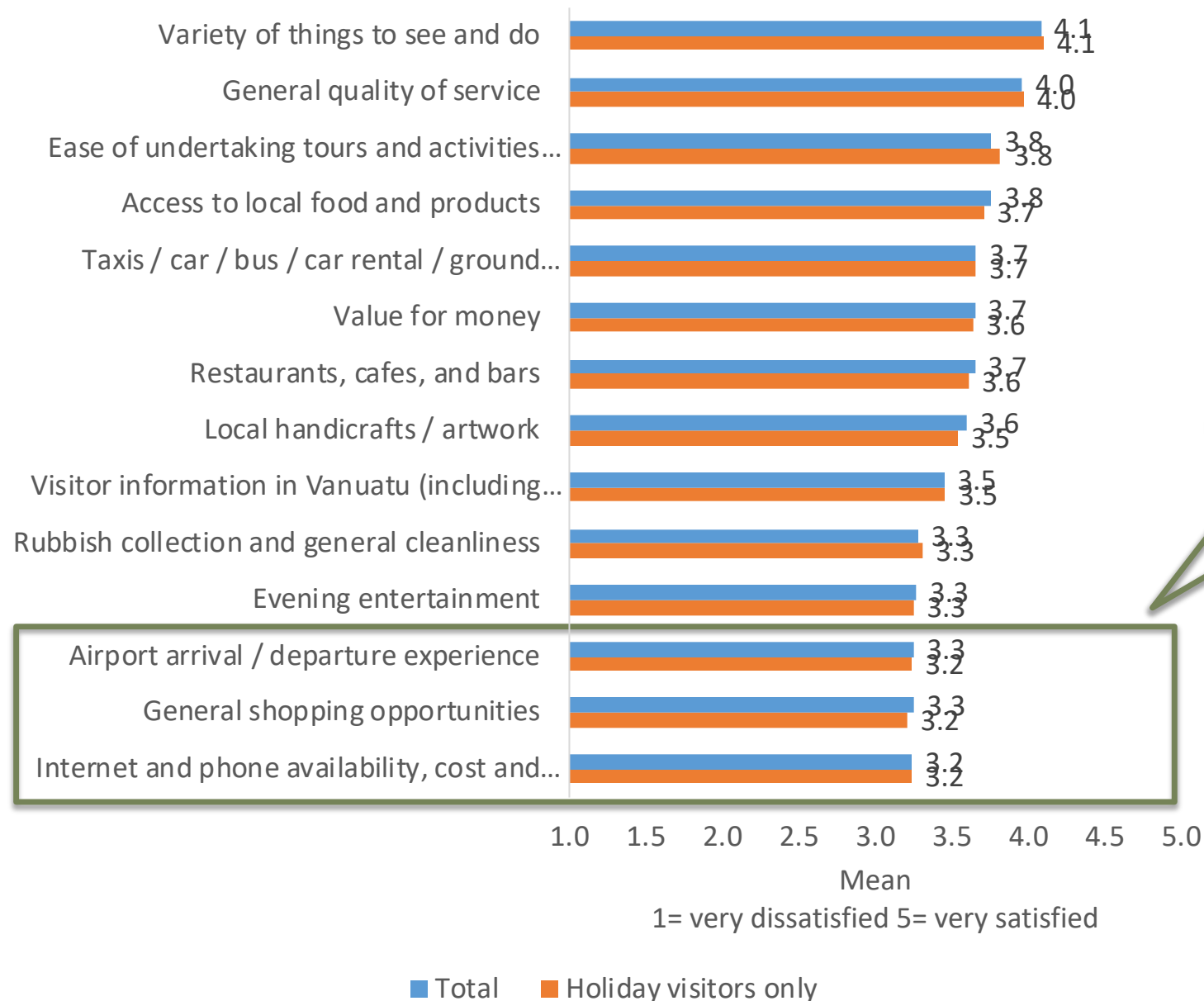
* Other reasons/Islands have not been included due to low percentages

Willingness to Return and Satisfaction



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

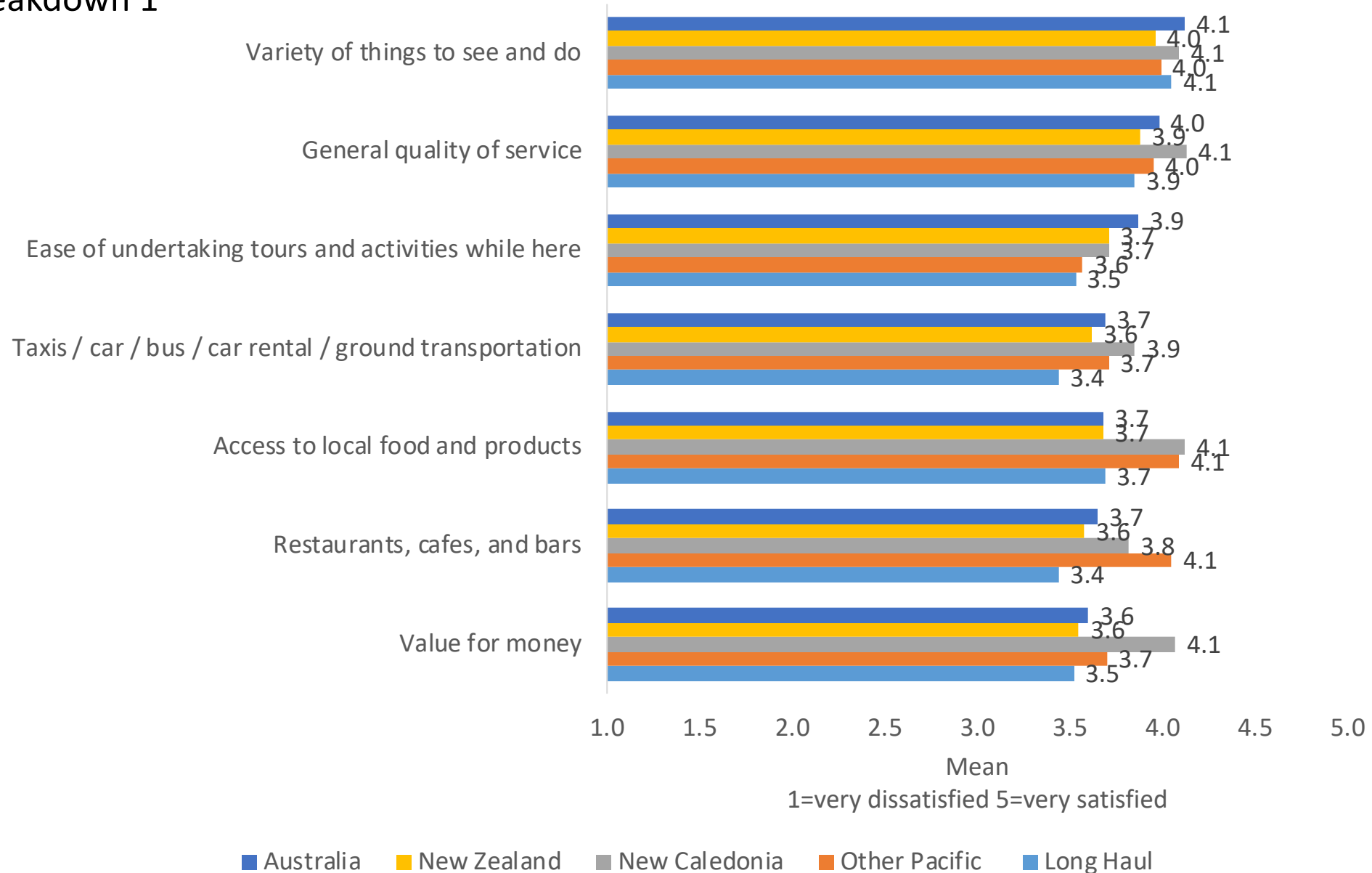
Degree of Satisfaction – Total VS Holiday visitors



**LEAST
SATISFIED
ITEMS**

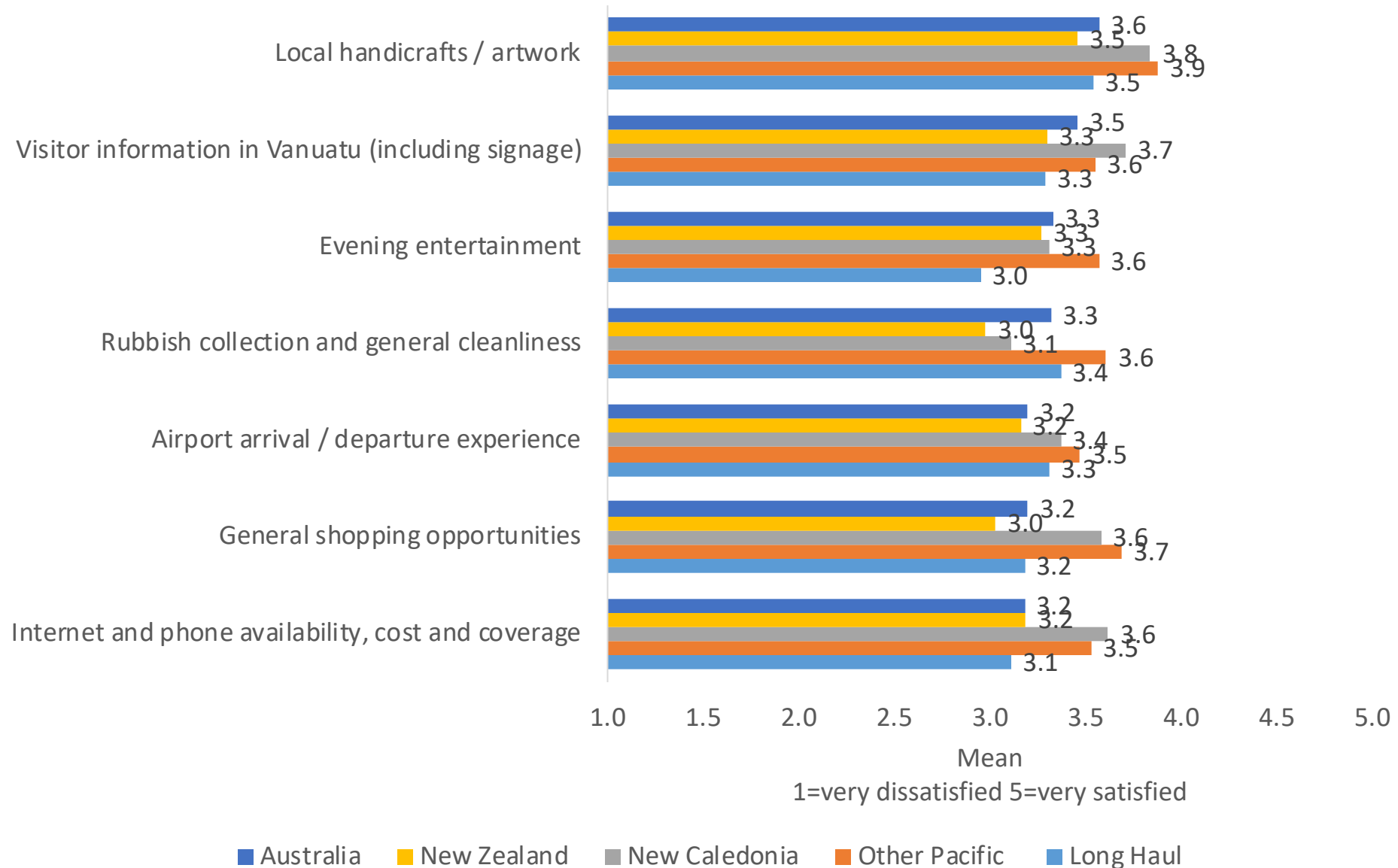
Degree of satisfaction – Market

Market breakdown 1



Degree of satisfaction – Market

Market breakdown 2



Most Appealing Aspects	
Themes	Percent
Local people	50.8%
Environment	32.2%
Activities, attractions and entertainment events	28.9%
Atmosphere	14.0%
Culture and history	7.3%
Food and Beverage	6.1%
Accommodation	5.8%
Convenience	4.3%
Level of service	3.0%
Overall good experience	2.1%
Other	2.0%
Uncommercial	1.8%
Safety	1.8%
New Developments	1.6%
Value for money	1.3%

Most Appealing Aspects of Vanuatu

"Cultural and social interaction. Practicing Bislama. Talking about life around a shell of kava. Talking to people in the street. Warm water and open beaches.

"The people who I met along the way. The island is full of beautiful kind souls who are genuinely happy and relaxed. I actually cried leaving the island, it is such an amazing place to be with the most positive vibe among the community. I didn't want to leave and I will definitely be back."

The people; the friendly relaxed atmosphere; the lack of "hustle"; the marine life (amazingly large fish on the waterfront); learning about their history and colonial history. Being able to see Vi-Vanuatu village life while driving, without having to take a "cultural" tour. The lack of ostentatious tourism. The natural beauty of the bush and sea. The initiatives in developing solar & wind power, and in banning the use of plastic bags and straws.



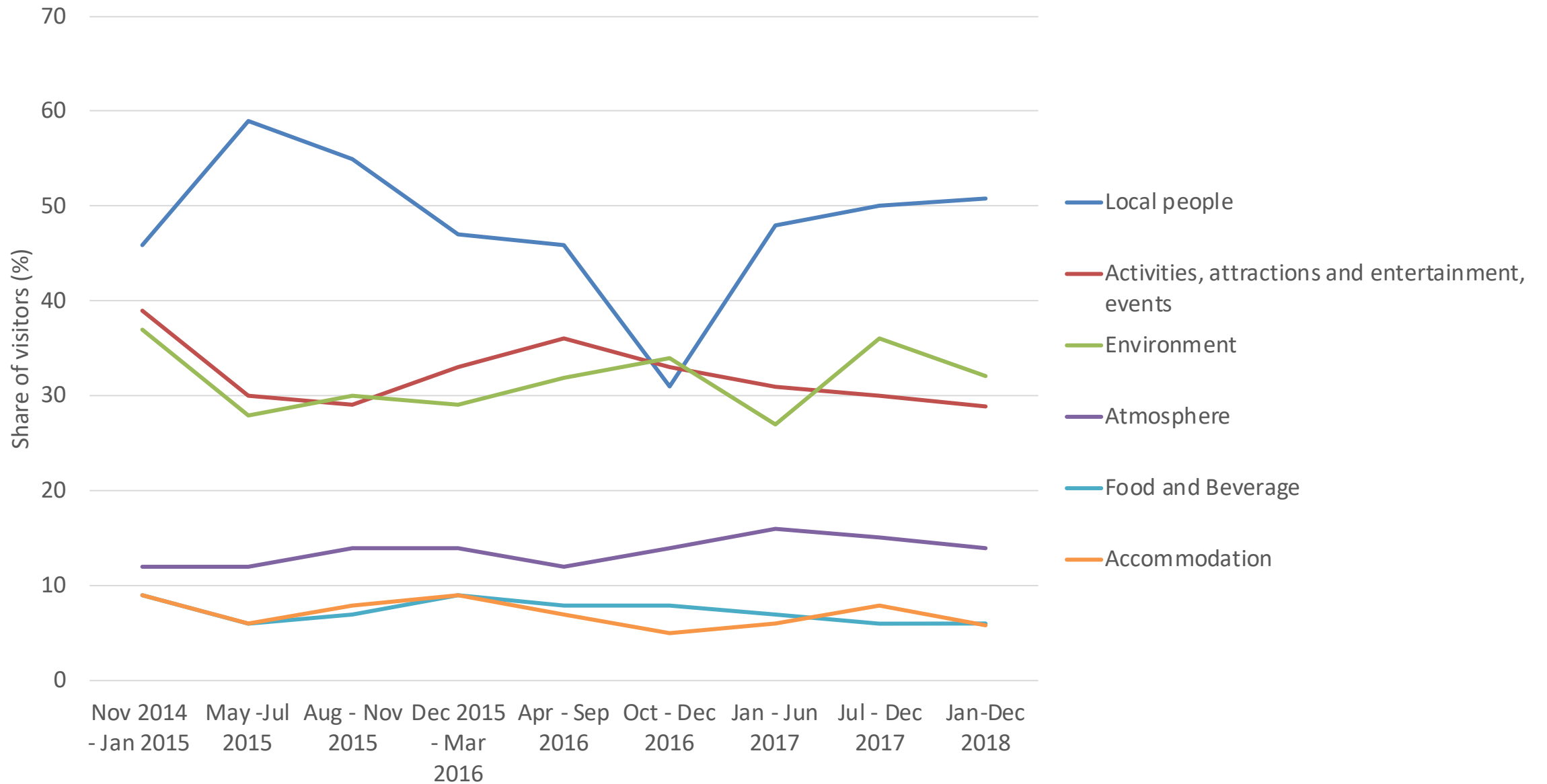
Most Appealing Aspects of Vanuatu

“Everything. The local people, the environment and seeing how tourists just flooding into Vanuatu. Agriculture and Tourism were the highlights of this trip. I was speechless with how cleanliness of the place; beach, lagoons, water holes. Just amazing. I was having the time of my life and I would return for holiday sometimes in the future.”

“The Ni Van people are so very friendly. Felt welcome and safe wherever we went. Snorkelling was sensational and the visit to the Tanna Volcano was the absolute highlight.”



Most appealing items



Least Appealing Aspects

Themes	Percent
Public services facilities and infrastructure	26.5%
Rubbish cleanliness and natural environment care	15.0%
Price of goods and services	14.3%
Food and beverage	10.9%
Local people, standard of service	8.8%
Social divide and social issues	7.2%
Attractions and activities	6.9%
Bus rental cars scooters or transport	5.7%
Airport and flight related issues	5.5%
Shops and the shopping experience	5.0%
Accommodation	4.7%
Port Vila	4.5%
Weather	3.8%
Safety related issues	2.0%
Stray animals and mosquitos diseases	1.8%
Cruise ships	1.3%*

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

Least Appealing Aspects of Vanuatu

"The roads in Port Vila badly need repair especially in the town huge potholes and different heights in the pavement I tripped badly"



"The roads are so poor you have to be mentally prepared for a day trip. Also the lack of local products, there's an abundance of poor quality Chinese products but very little if any locally produced products or souvenirs."

Least Appealing Aspects of Vanuatu

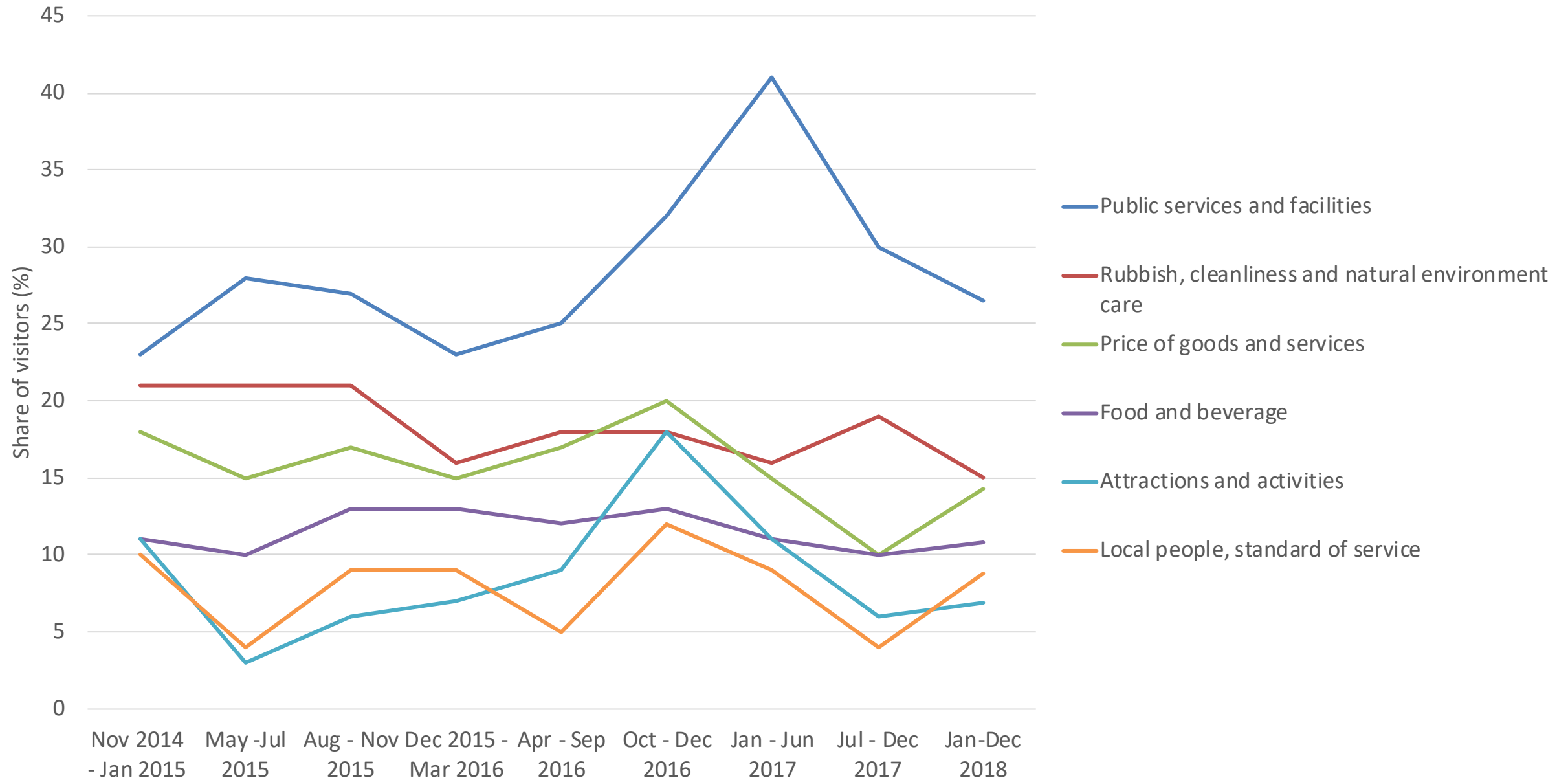
"We found a lot of garbage in the ocean and on the coast. Plastics and other things, also barbed wire and other waste. It would be nice if the conservation of nature was taken seriously"

"There is not always up-to-date information. The rubbish and smell around the produce market where all the tour pick ups are was terrible. Roads were terrible. Locals singing to raise money for health care of invalid family members was very sad.."

"The terrible smell near the market when getting off the Iririki ferry; areas where there is a lot of rubbish lying around - for instance in a village near the Mele Cascades"



Least appealing items

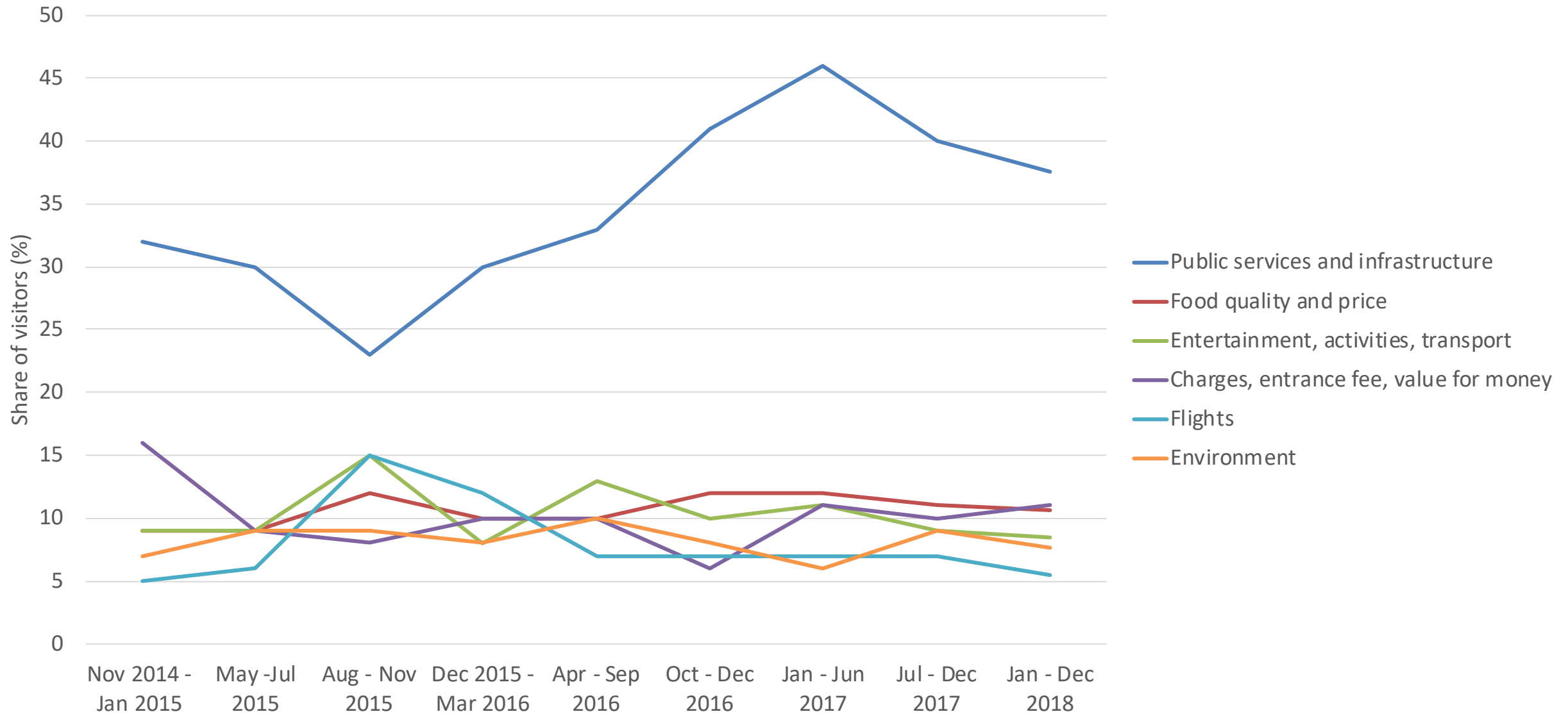


Suggestions for Improvement

Themes	Percent
Public services and infrastructure	37.6%
Charges entrance fee value for money	11.1%
Food quality and price	10.7%
Entertainment activities transport	8.4%
Environment (cleanness rubbish nature)	7.6%
Accommodation	6.1%
Local people, standards of service	5.9%
Flight related issues	5.4%
Shopping experience	3.7%
Social issues	3.3%
Weather	3.3%
Safety	1.3%*

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

Suggestions for improvement



THANK YOU



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The views expressed in this publication do not necessarily reflect those of the New Zealand Government.