

Niue Visitor Survey

April – September 2019

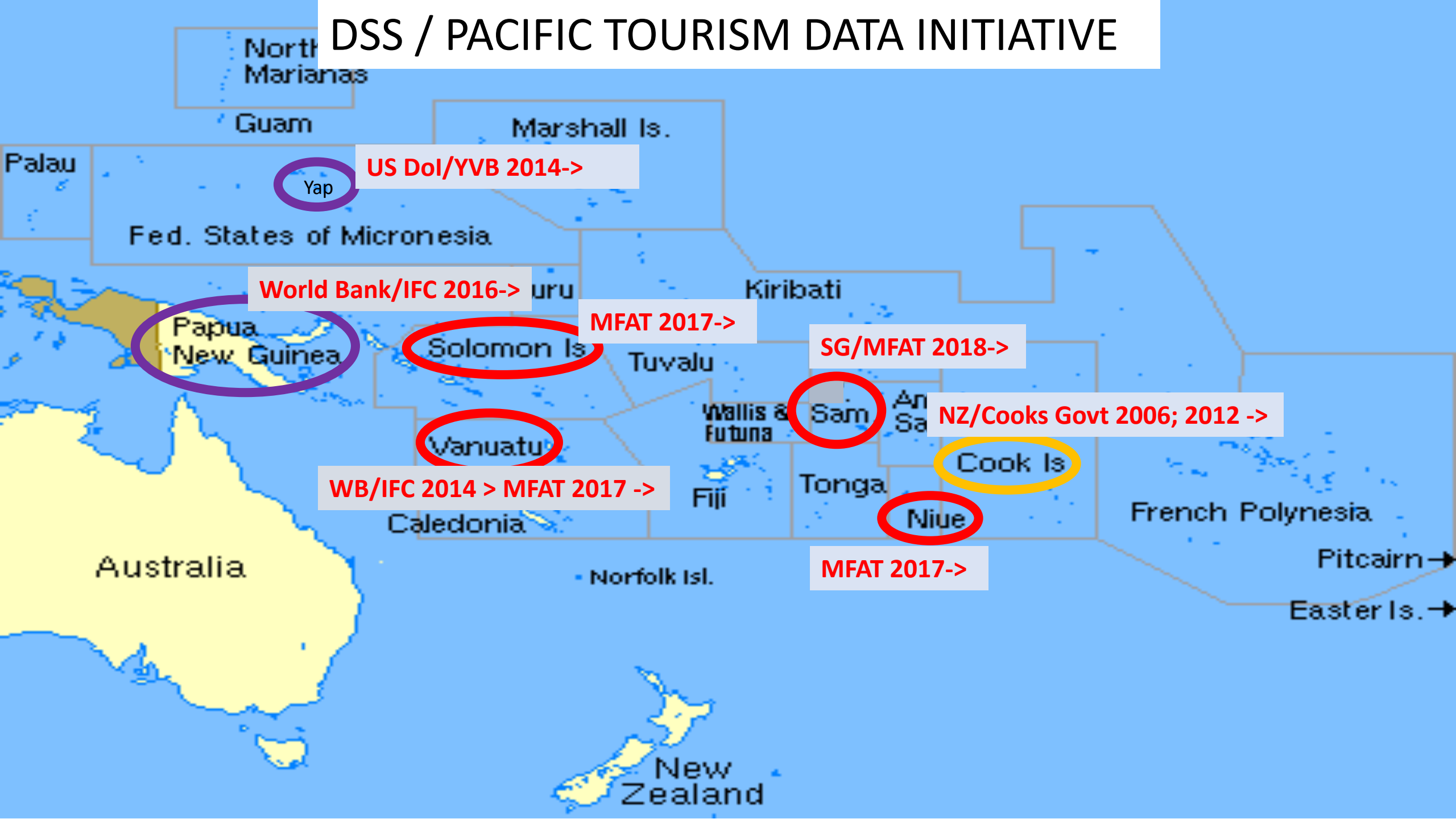
Public Presentation, Niue Tourism Office, Alofi, November 27, 2019



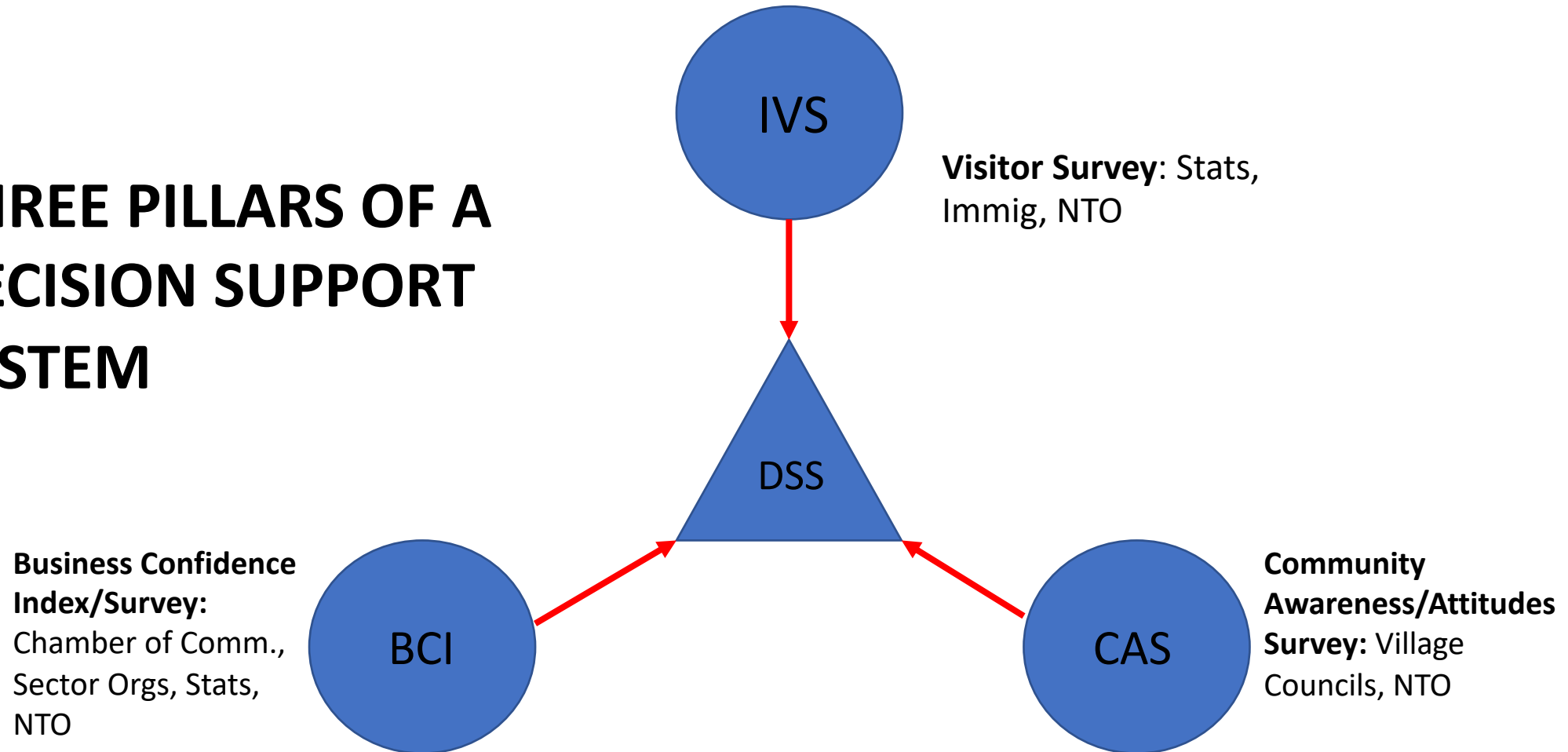
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DSS / PACIFIC TOURISM DATA INITIATIVE



THREE PILLARS OF A DECISION SUPPORT SYSTEM



Niue PTDI Resources

www.nztri.org.nz/1142169-ptdi-niue



Available Resources

-  [Niue - International Visitor Survey - Results Report \(Apr 2019 to Sept 2019\)](#)
-  [Niue - International Visitor Survey - Time Series \(Oct 2017 to Sept 2019\)](#)
-  [Niue - International Visitor Survey - Results Report \(Oct 2018 to March 2019\)](#)
-  [Niue - International Visitor Survey - Time Series \(Oct 2017 to March 2019\)](#)
-  [Niue Tourism Forum - Presentation \(March 2019\)](#)
-  [Niue - Business Confidence Index Survey - \(Feb 2019\)](#)
-  [Niue - International Visitor Survey - Results Report \(October 2017 to September 2018\)](#)
-  [Niue - International Visitor Survey - Presentation \(October 2017 to September 2018\)](#)
-  [International Visitor Pilot Report – Six month report \(October 2017 to March 2018\)](#)

April to September 2019 respondents



Total number of emails sent: **2,985**

CONVERSION RATE OF **36.0%**

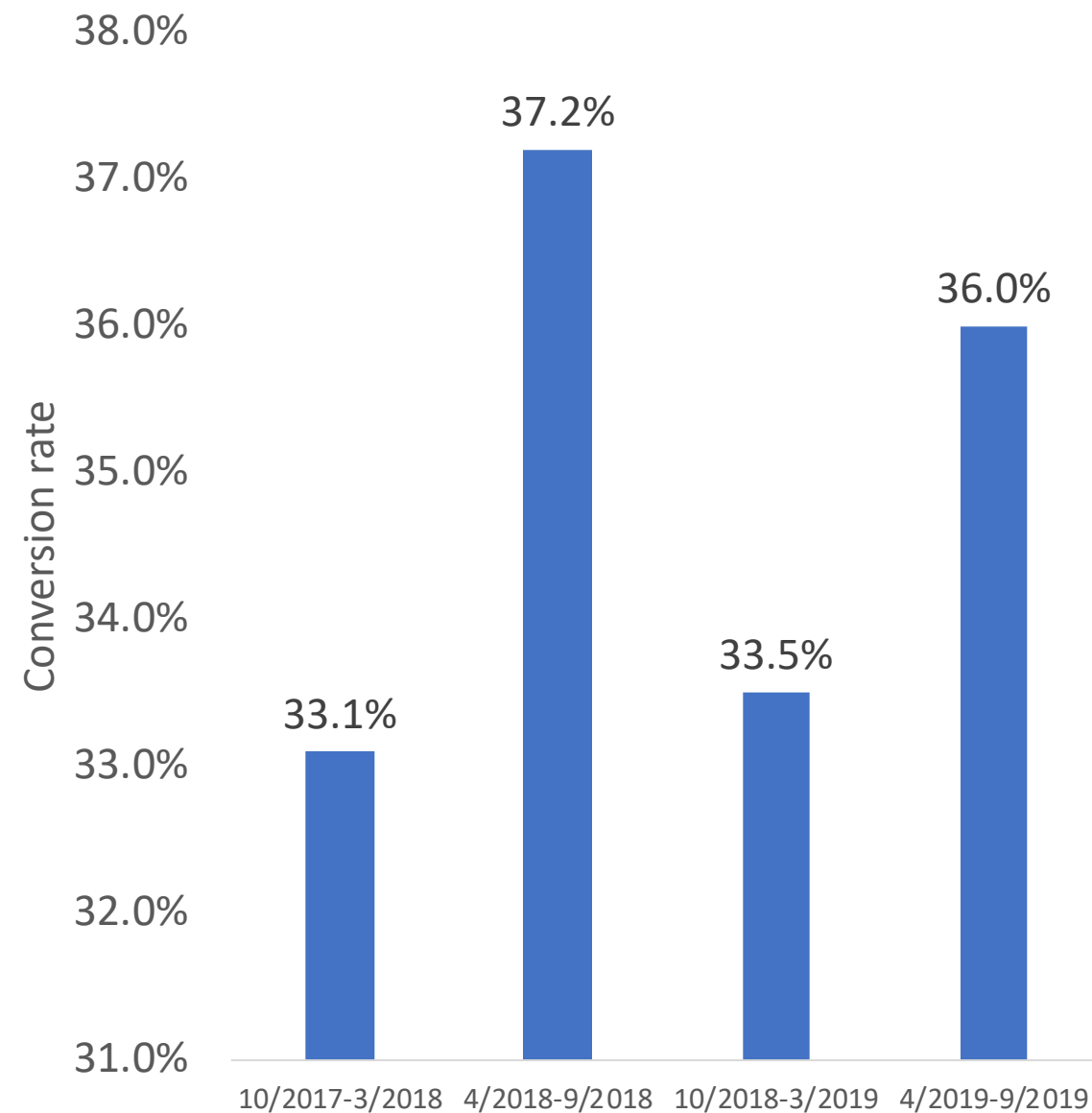
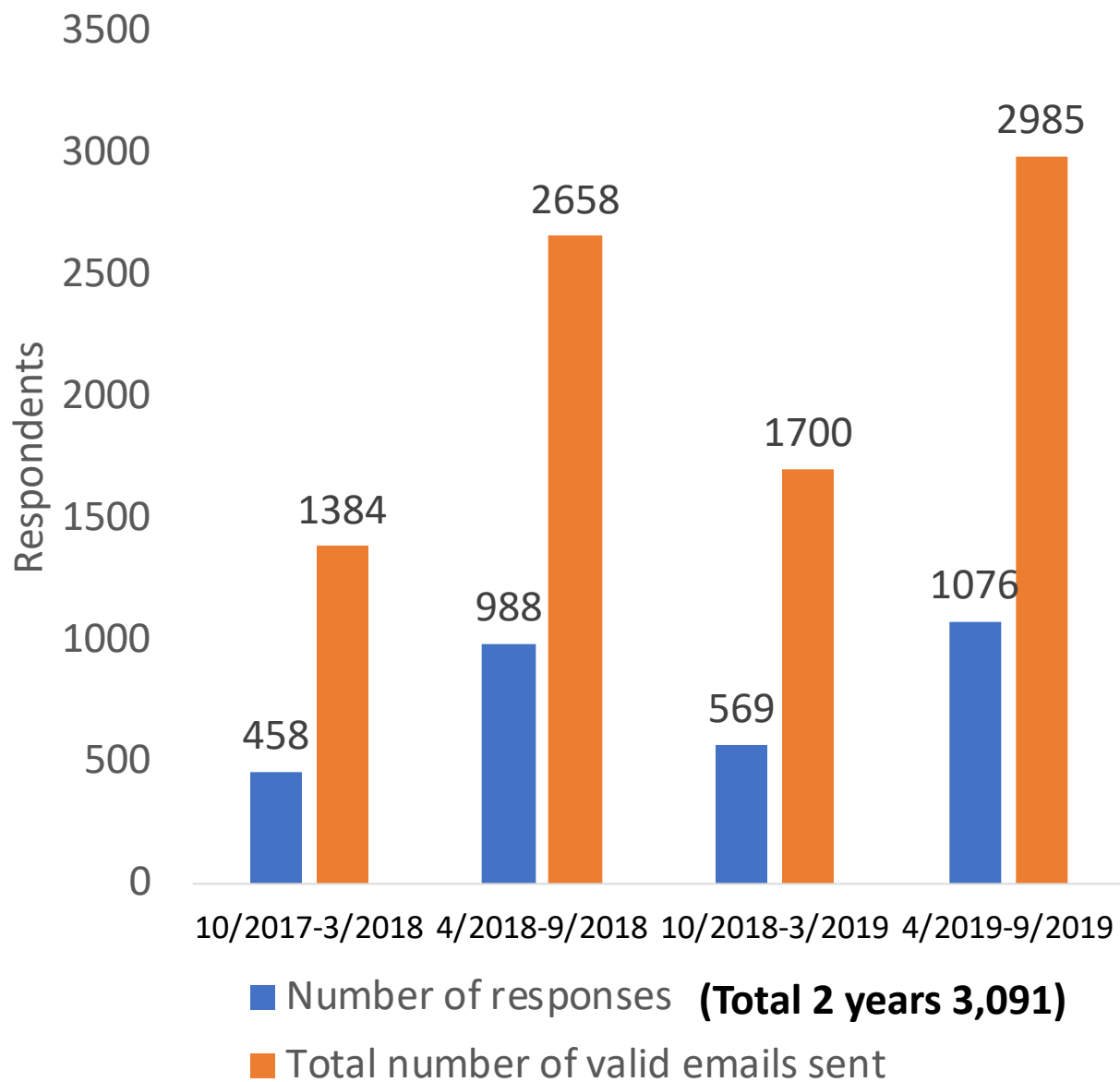


Total number of responses: **1,076**



Spend: Responses cover a total of
1,925 adults and **255 children**

Respondents

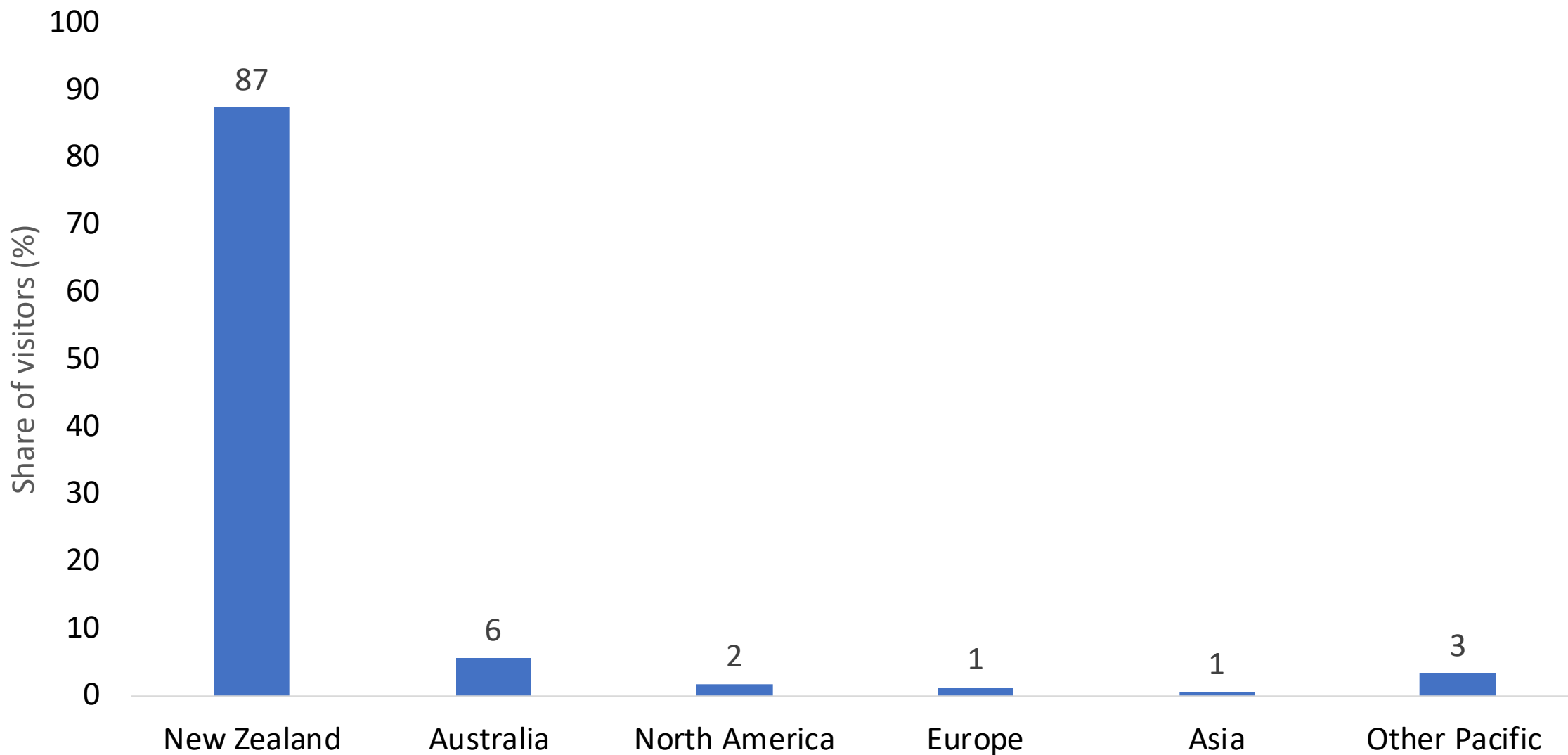




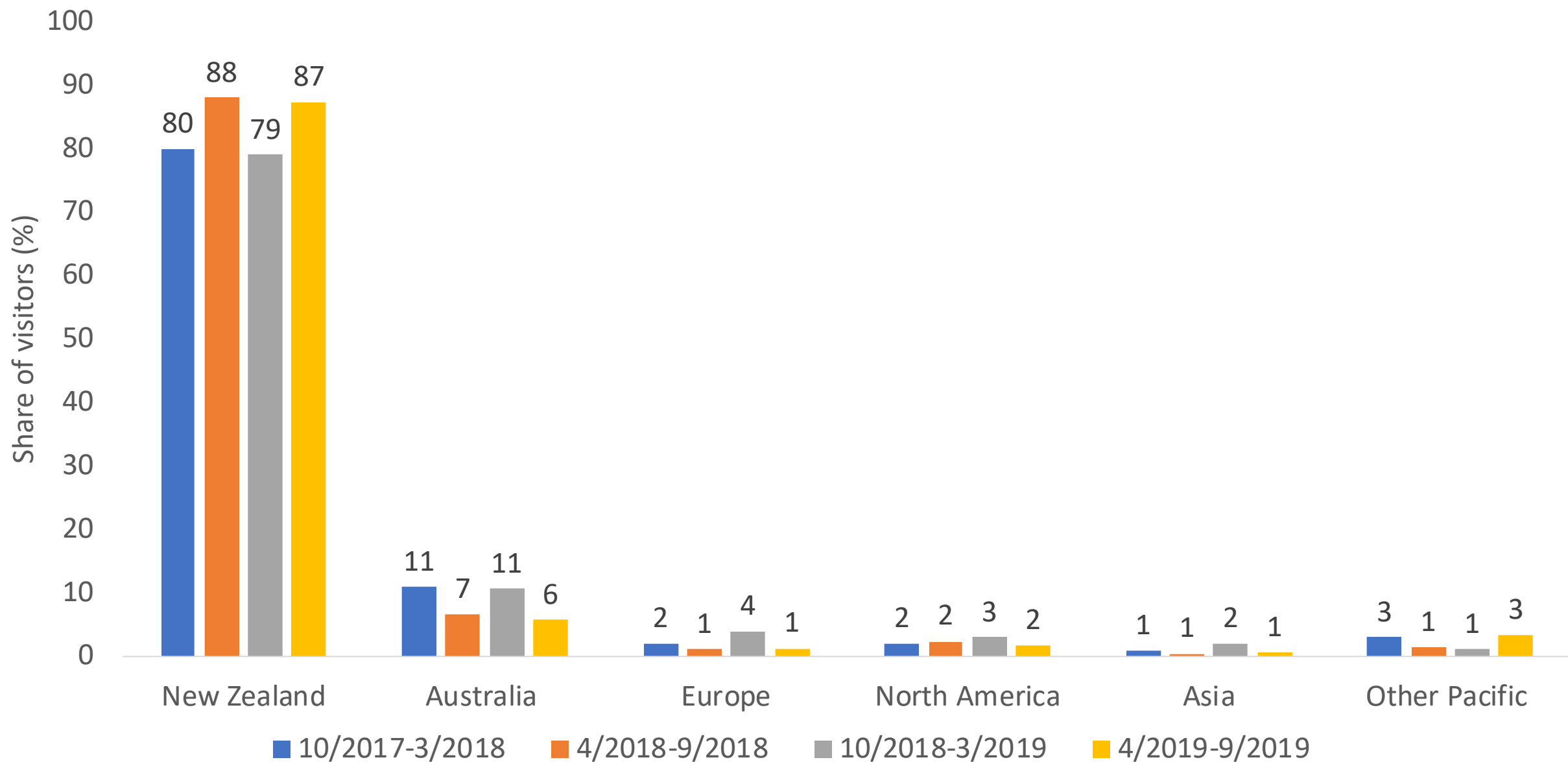
The characteristics of visitors to Niue

Age, gender, education, country of origin, income, purpose of visit, travelling companions, number of previous visits, length of stay, type of accommodation, transport used, information sources, and purchasing behaviour

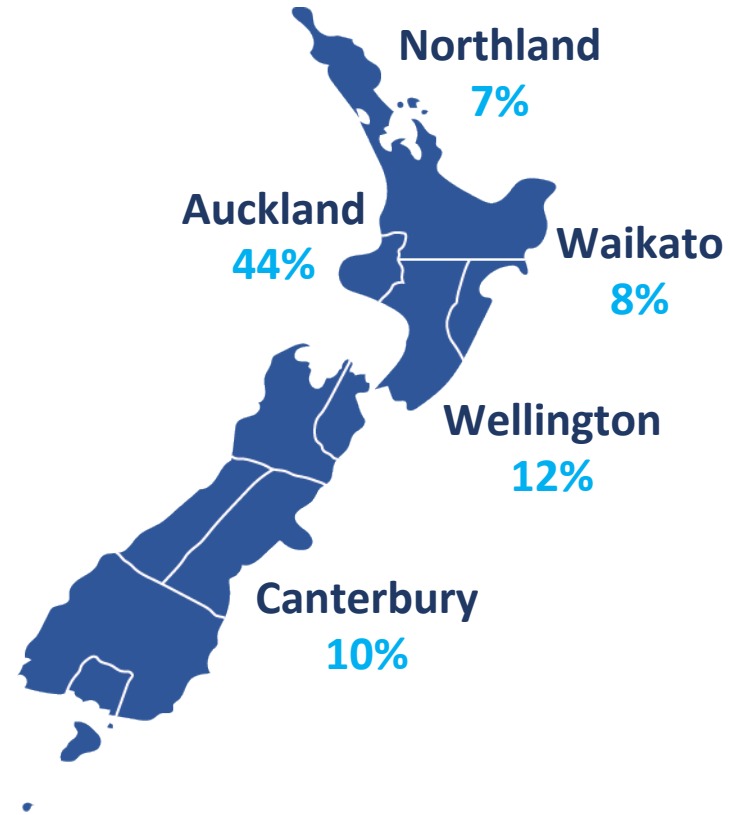
Country of origin



Country of origin

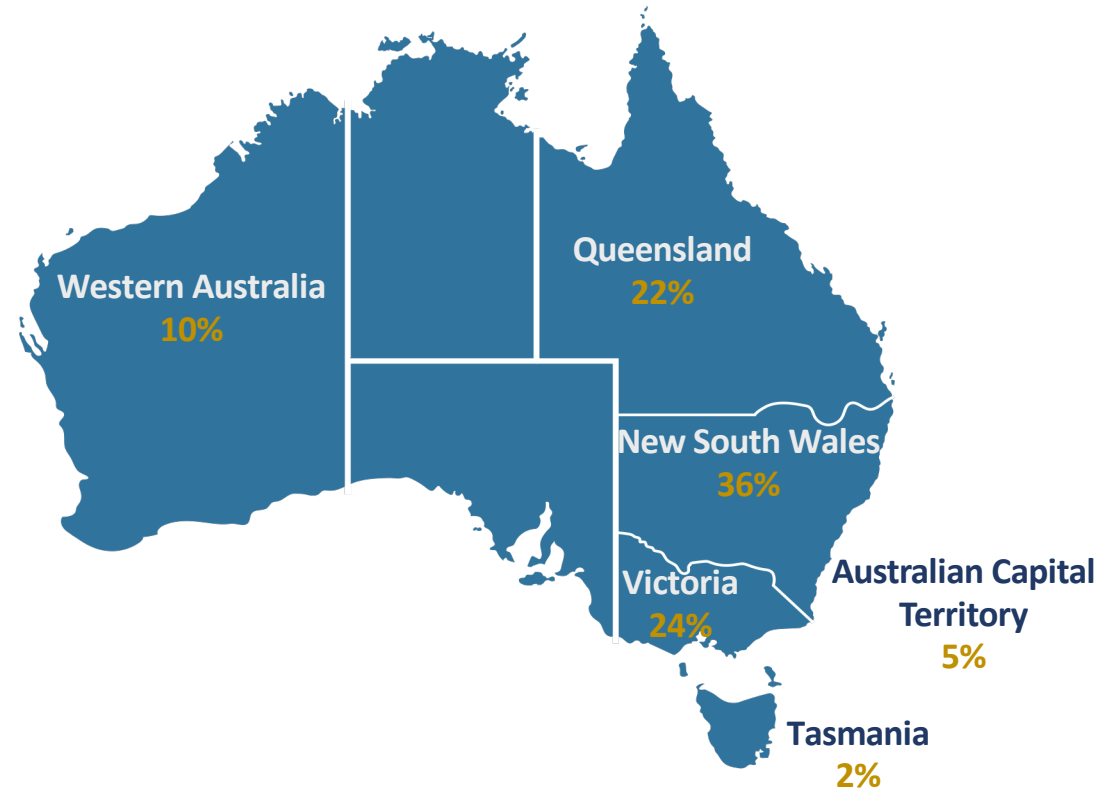


New Zealand respondents



Auckland, Wellington, Waikato, Canterbury, and Northland make up **81%** of all New Zealand visitor arrivals

Australian respondents



New South Wales, Queensland and Victoria make up **82%** of all Australian visitor arrivals

Visitor characteristics

Annual household income (NZ\$)



15%	Under \$50,000
33%	\$50,001 - \$100,000
26%	\$100,001 - \$150,000
16%	\$150,001 - \$200,000
5%	\$200,001 - \$250,000
6%	Over \$250,001

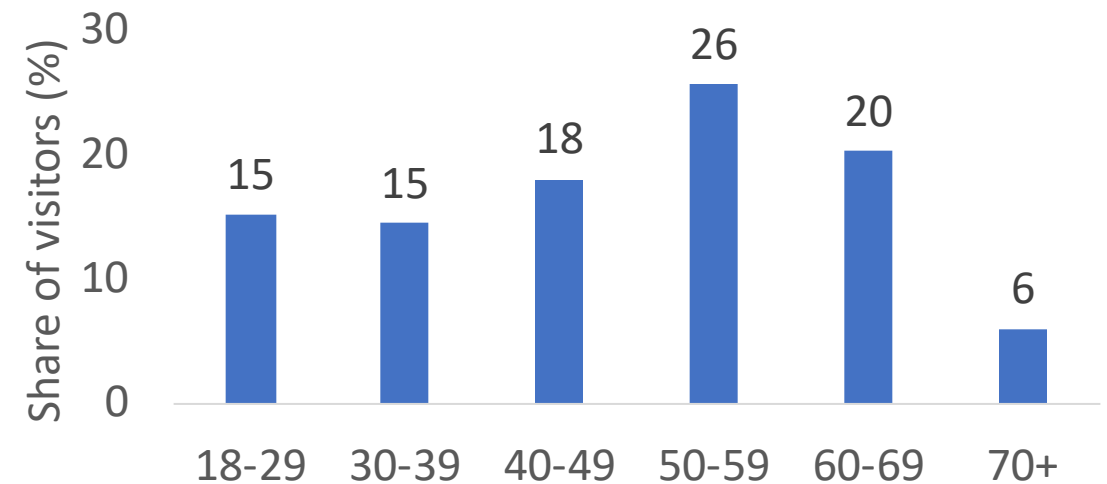
Average 2019 HS \$126,000 (2018 HS \$122,000)

Highest qualification



71%	Tertiary qualification
22%	High school qualification
4%	No formal qualification
3%	Other

Age Distribution



Visitor characteristics

Main Purpose of Visit



- 76%** Holiday
- 9%** Business or conference
- 6%** Visiting friends or relatives
- 3%** Special event- cultural

Travel Companions*



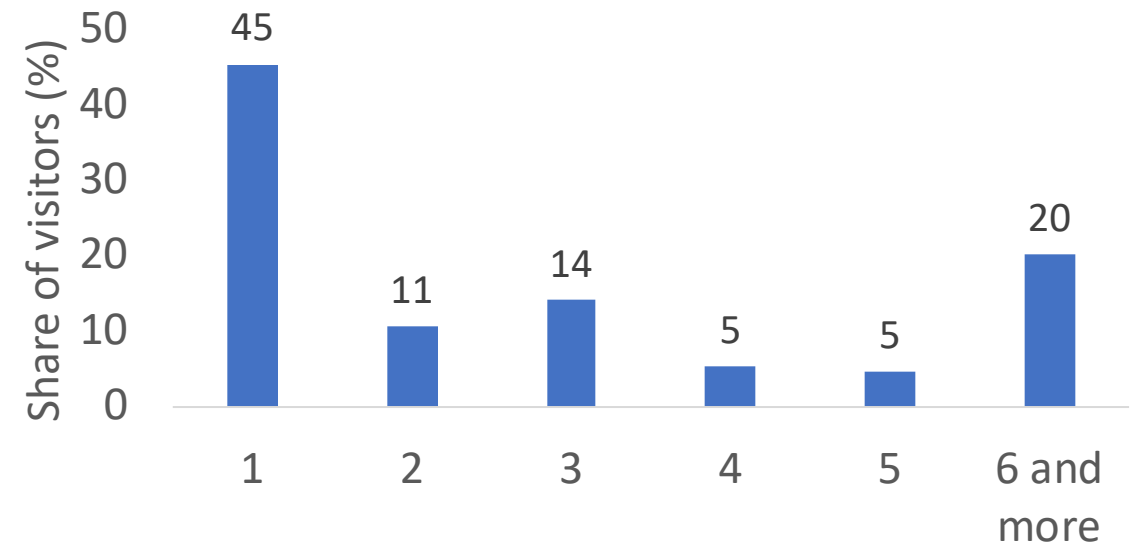
- 68%** Partner/Spouse
- 38%** Family group
- 21%** Friends

Number of Companions



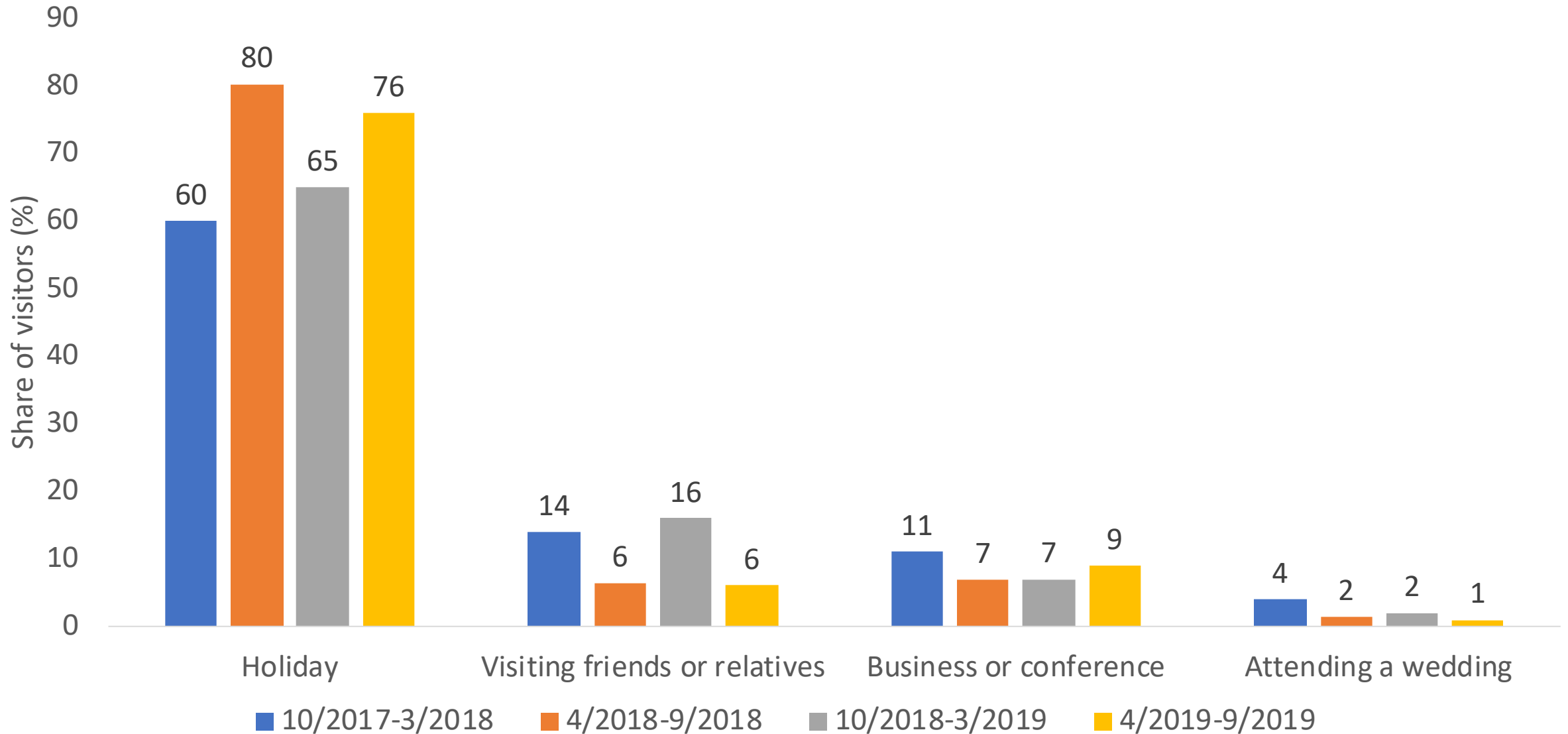
88% of visitors travelled to Niue with others, **12%** by themselves

...of the visitors who travelled to Niue with companions:

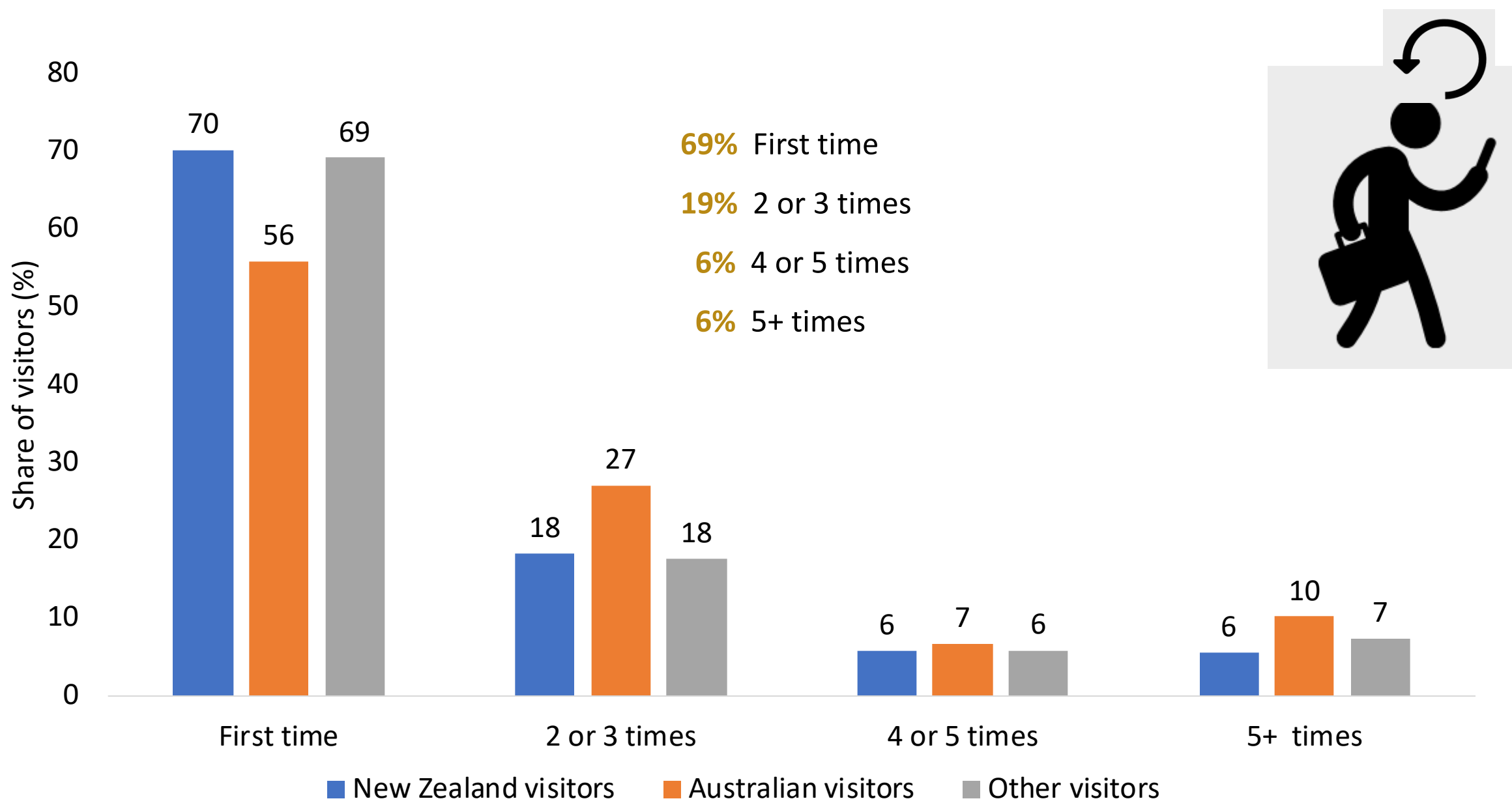


*: Multiple responses, therefore total does not add up to 100%.

Main purpose of visit (Top 4)

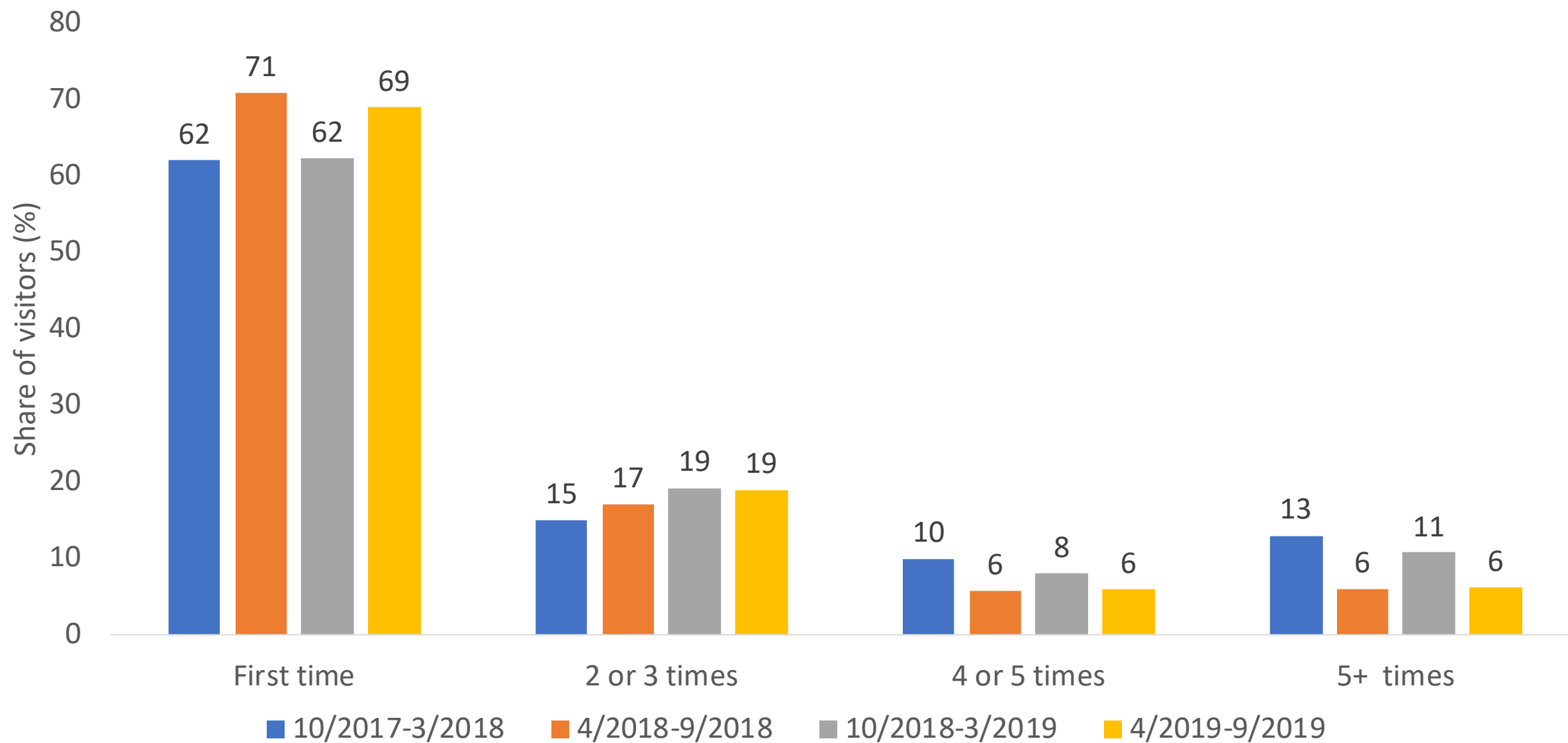


Previous visits



Note: Numbers may not sum to 100% due to rounding.

Previous visits

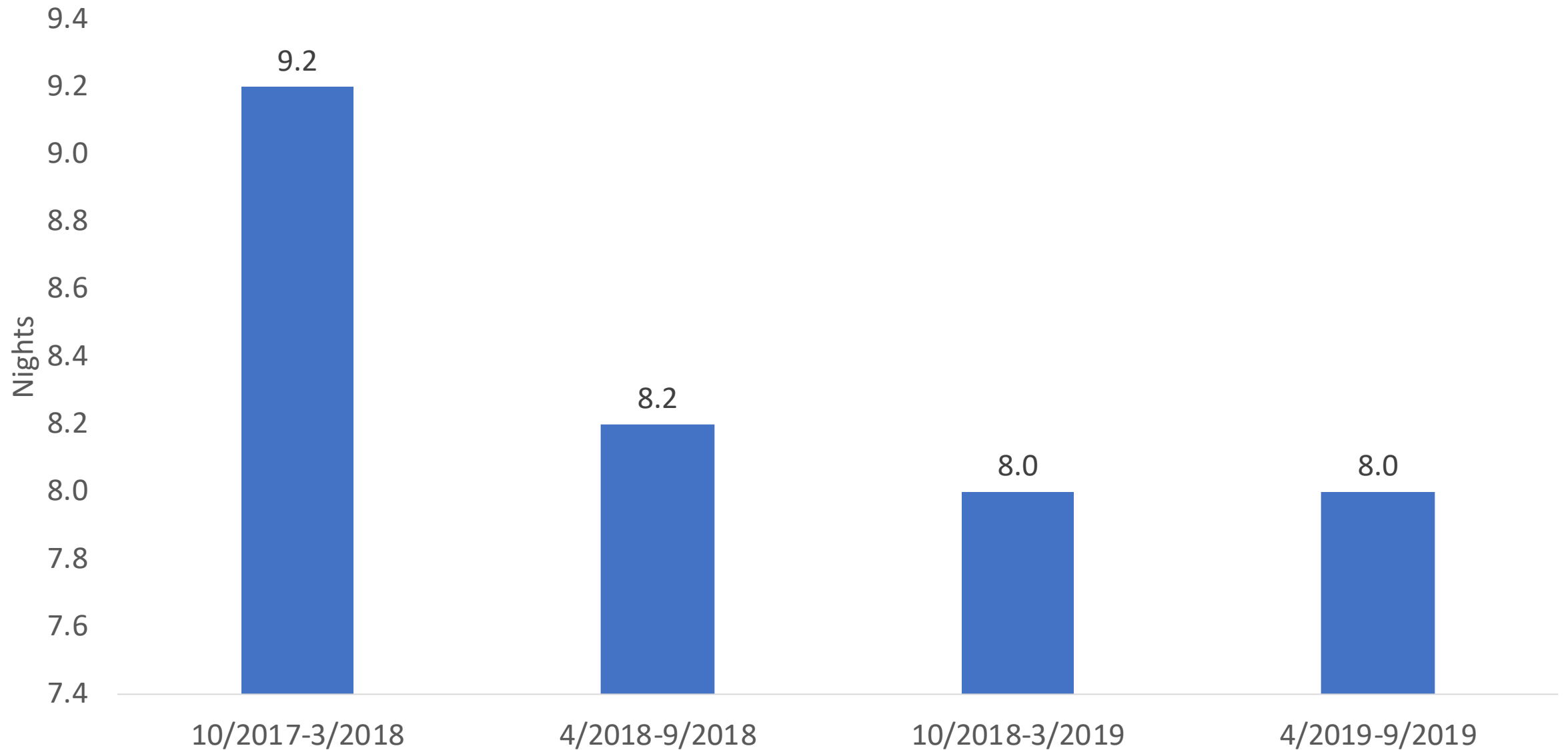


Length of stay

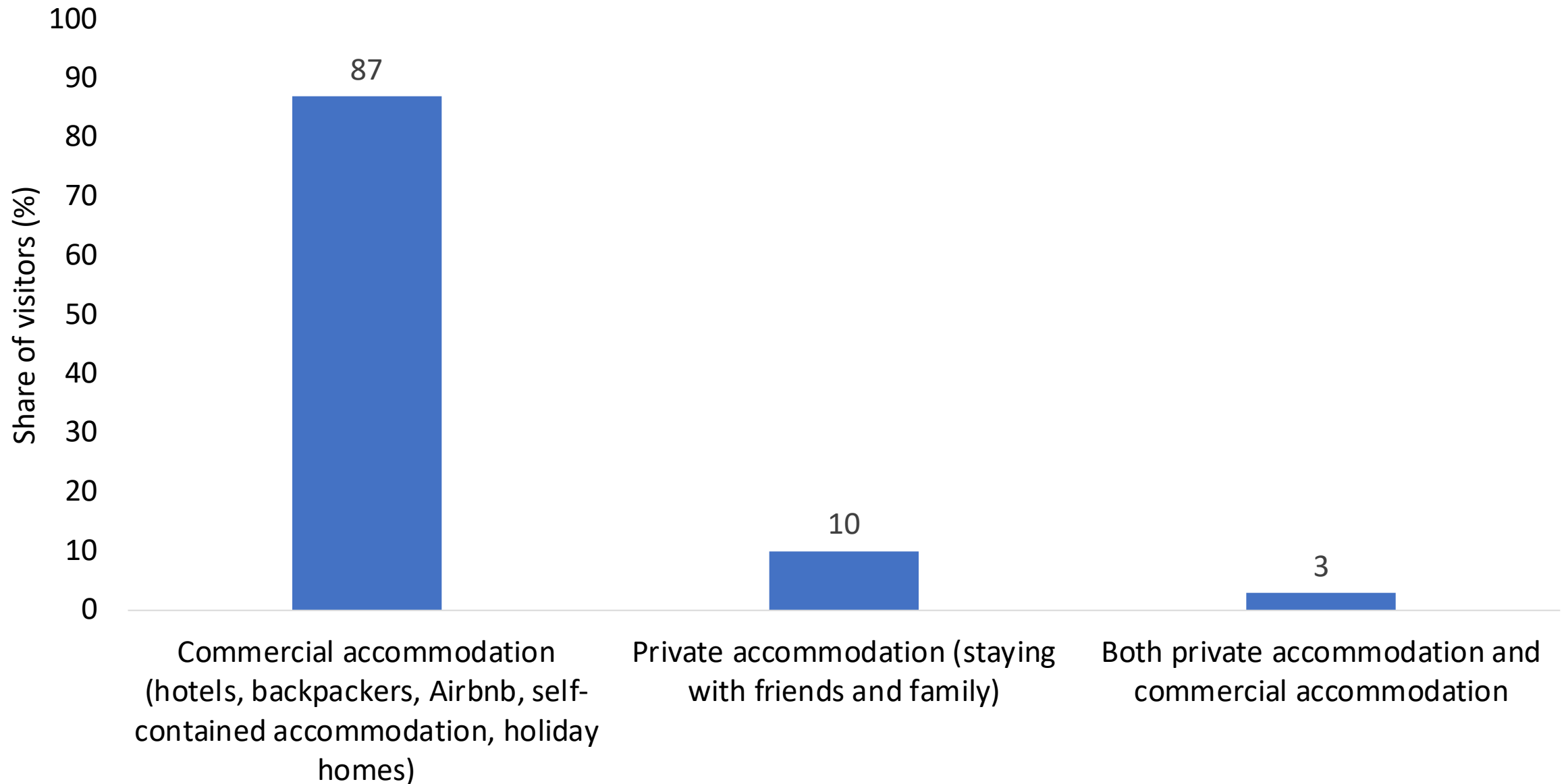
	Overall	New Zealand	Australia	Other markets	Holiday visitors	Non-holiday visitors	Business visitors	VFR visitors
Mean (Nights)	8.0	7.9	9.4	7.5	8.0	8.2	6.5	10.2

Note: 31+ days as outliers were removed for analysis.

Average length of stay



Type of accommodation



Other Destinations



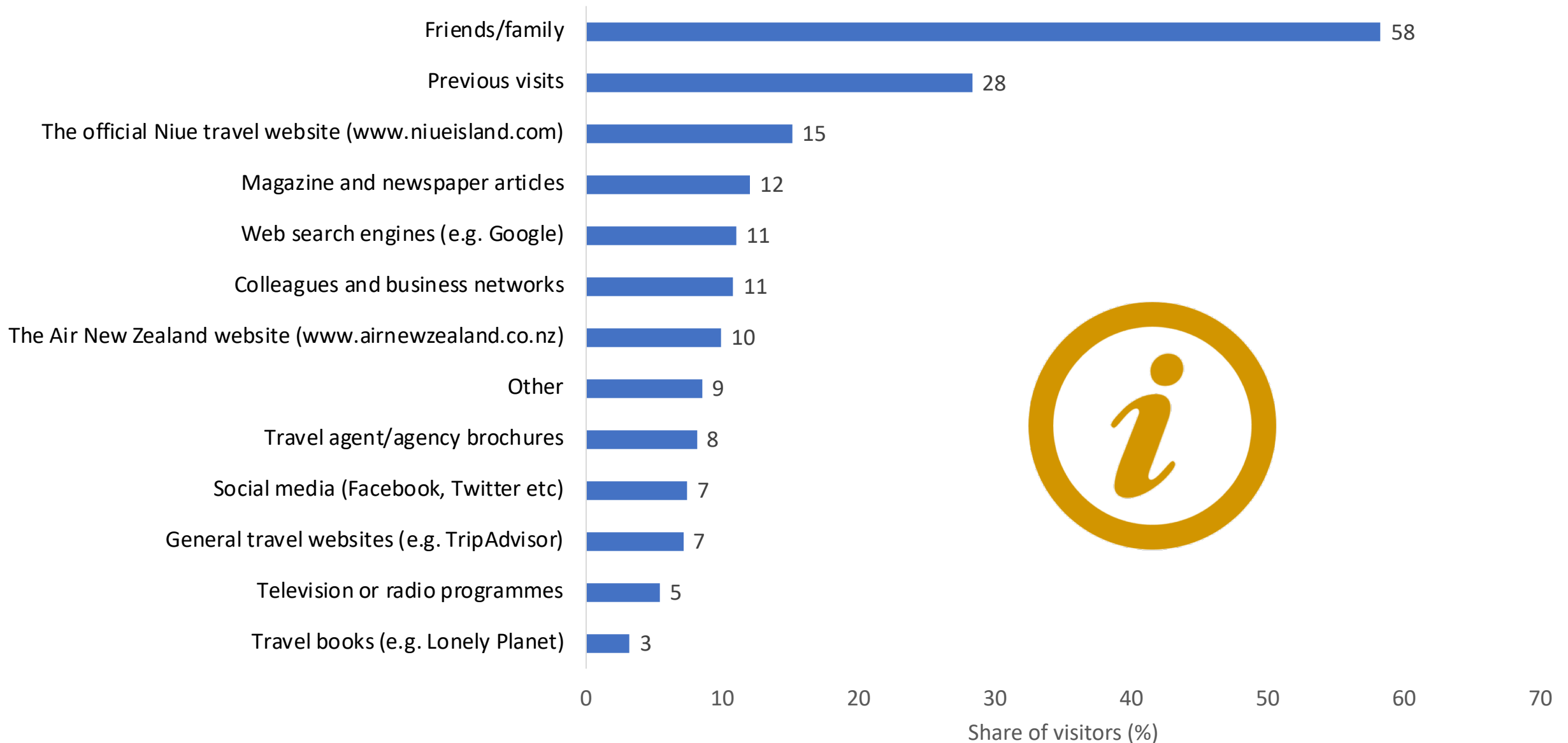
For **94%** of visitors, Niue is the sole destination for their trip.

For 6% of visitors Niue was part of a larger journey
(2018 HS 8%)



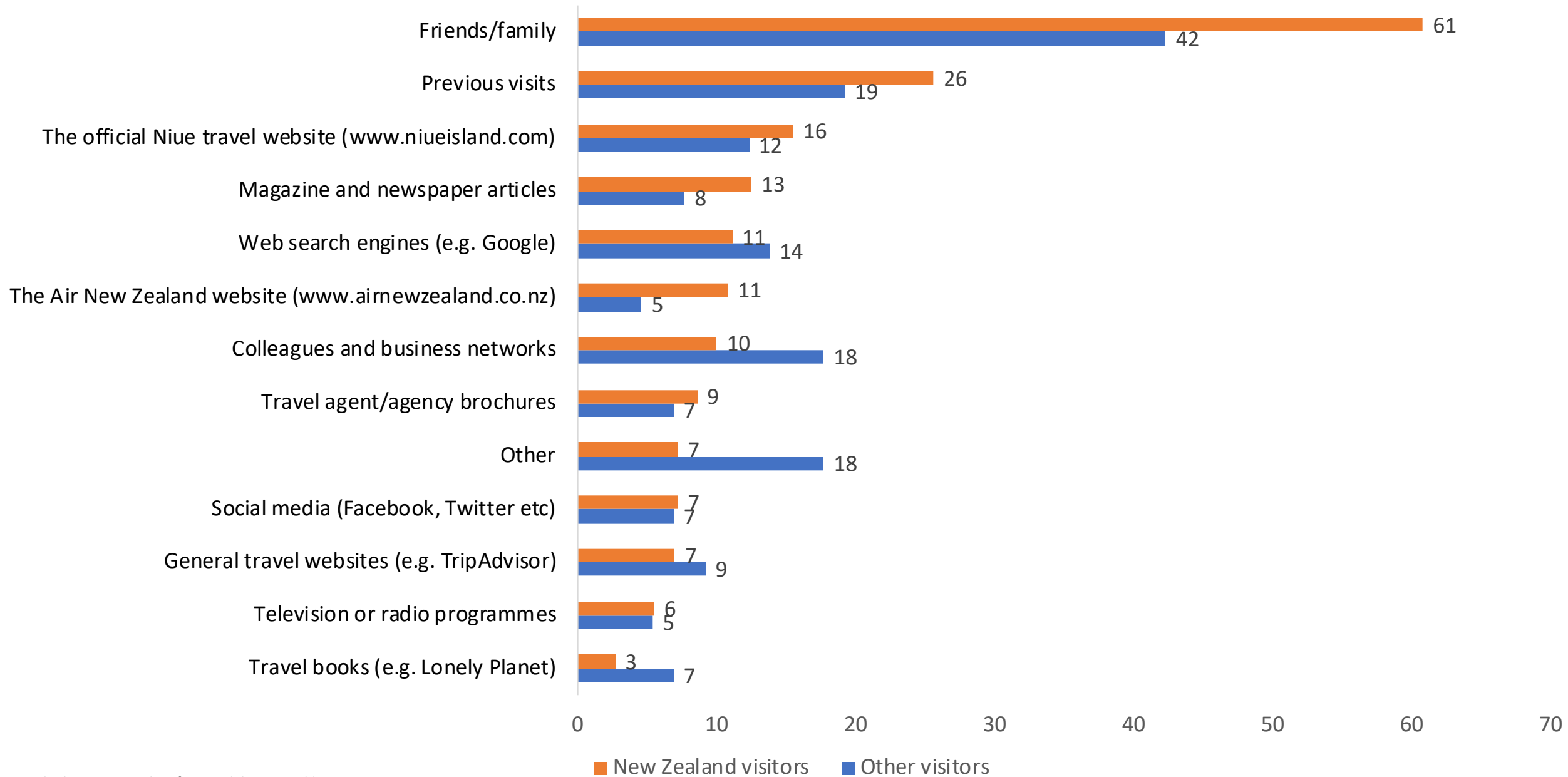
- 76%** New Zealand
- 27%** Other Pacific Countries
- 6%** Australia
- 2%** North America
- 2%** Asia

How did you find out about Niue?



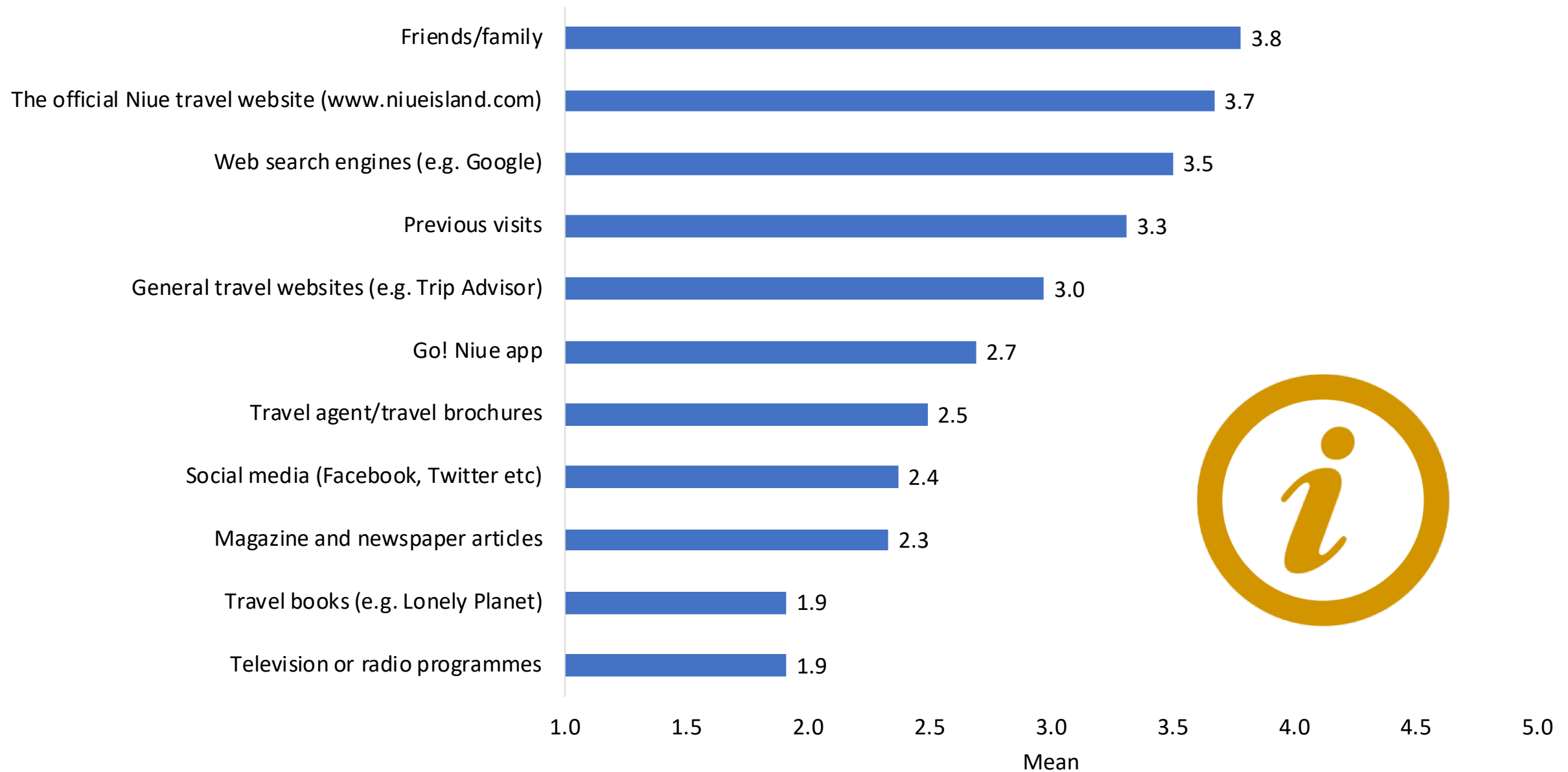
Note: Multiple responses, therefore total does not add up to 100%.

How did you find out about Niue?

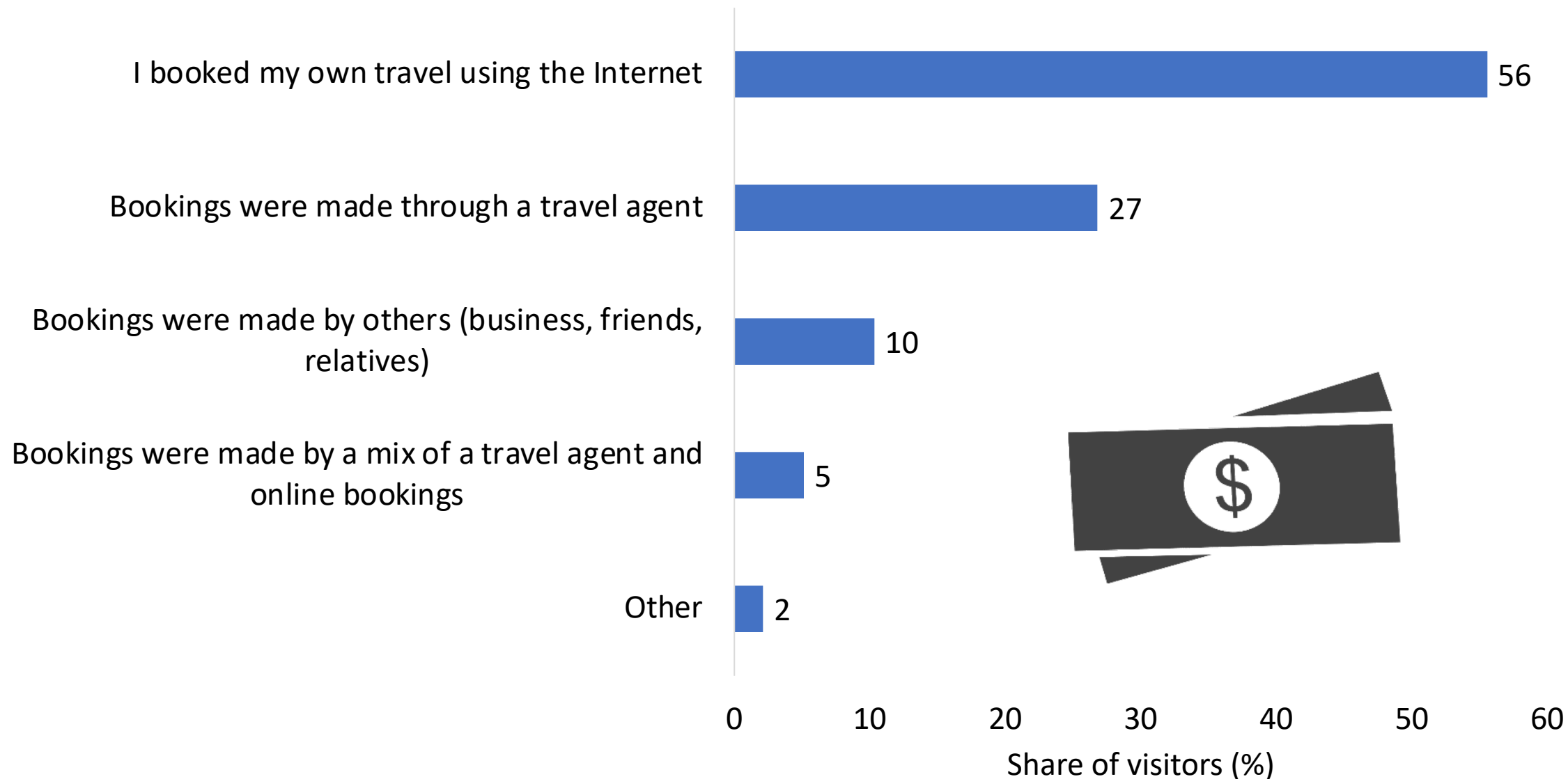


Note: Multiple responses, therefore total does not add up to 100%.

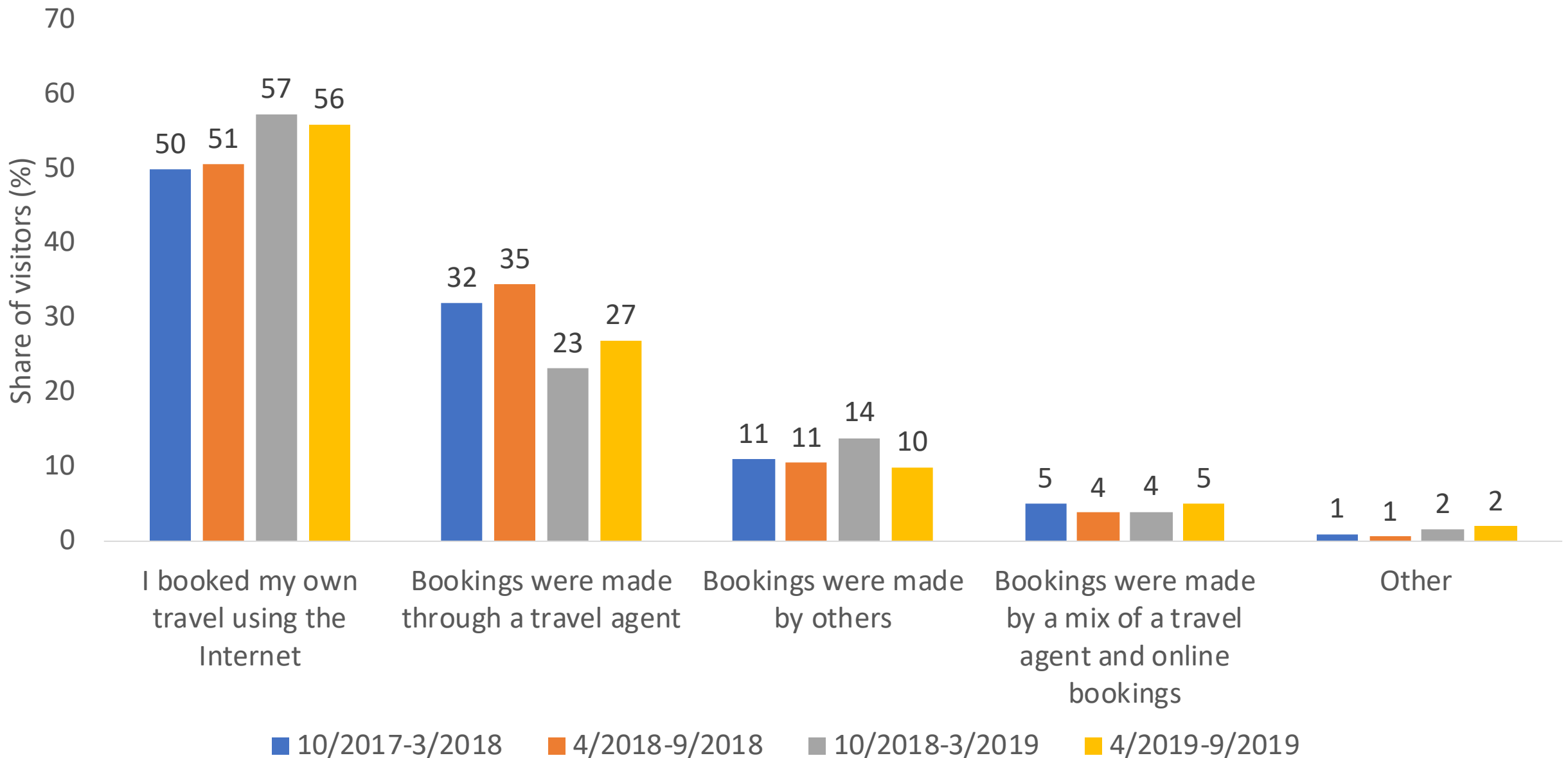
Importance of information sources for planning



How did you purchase your travel?



How did you purchase your travel?

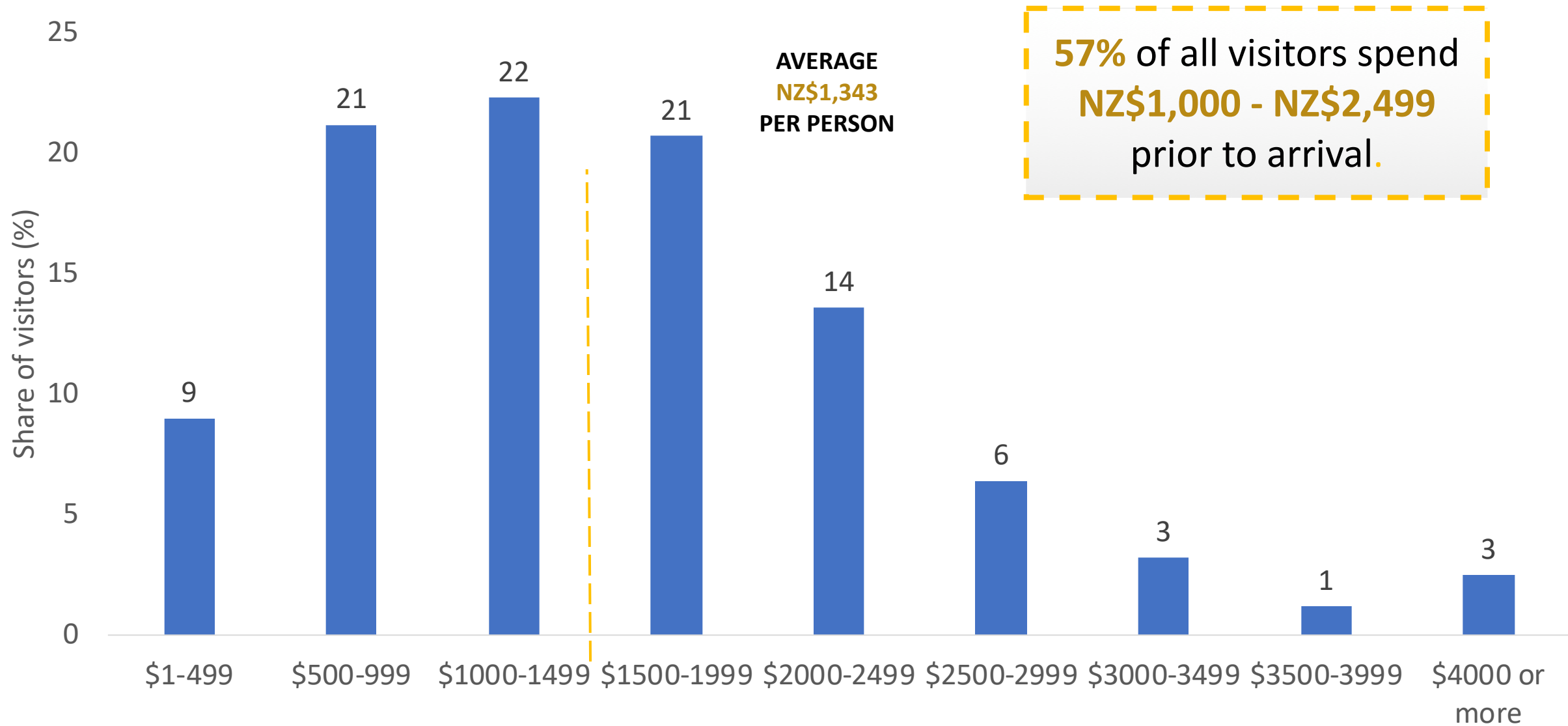




Visitor expenditure

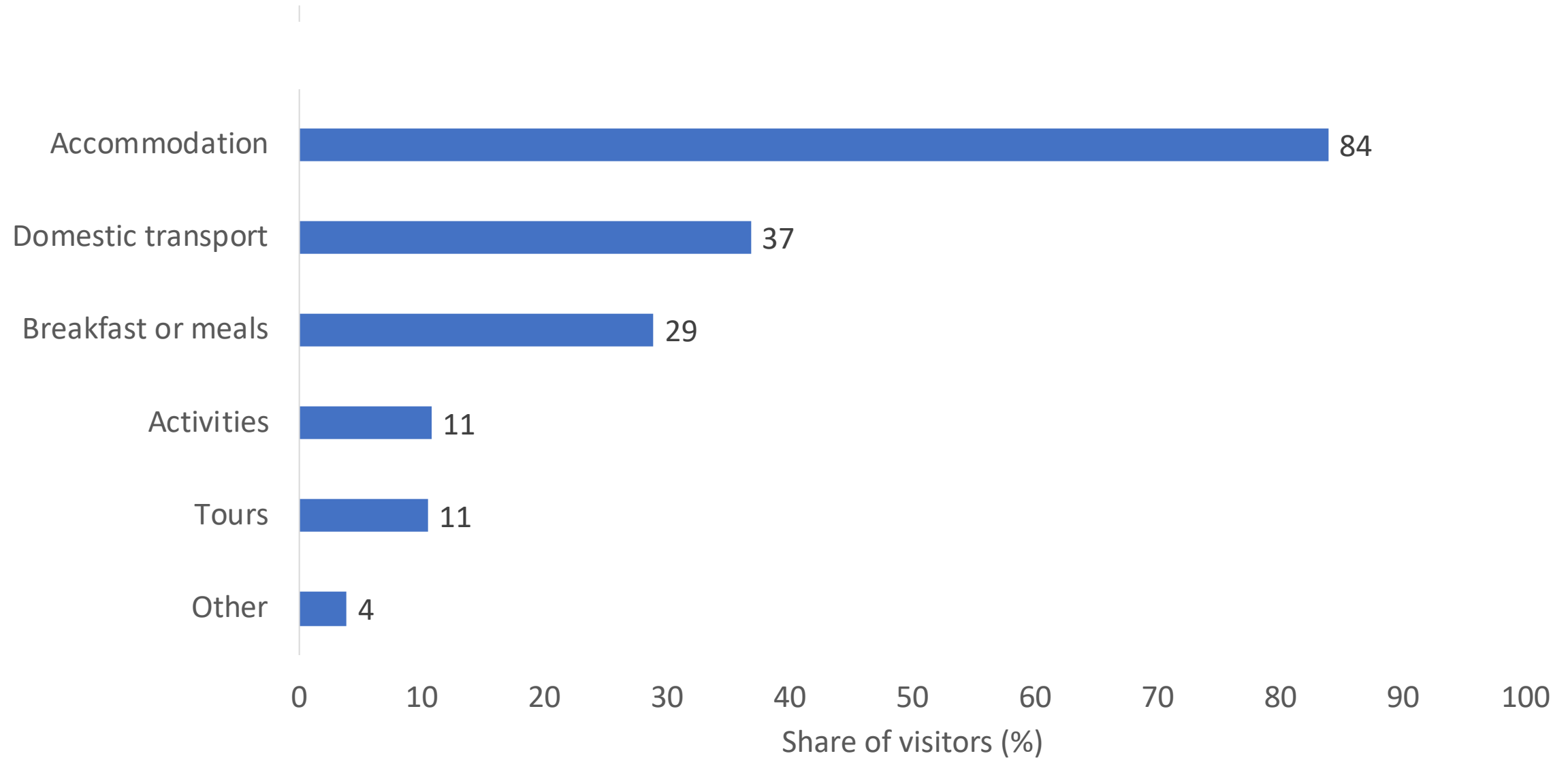
Money spent prior to arrival and while in Niue, and a breakdown of spending

Pre-paid expenditure



Note: Numbers may not sum to 100% due to rounding.

Pre-paid items



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

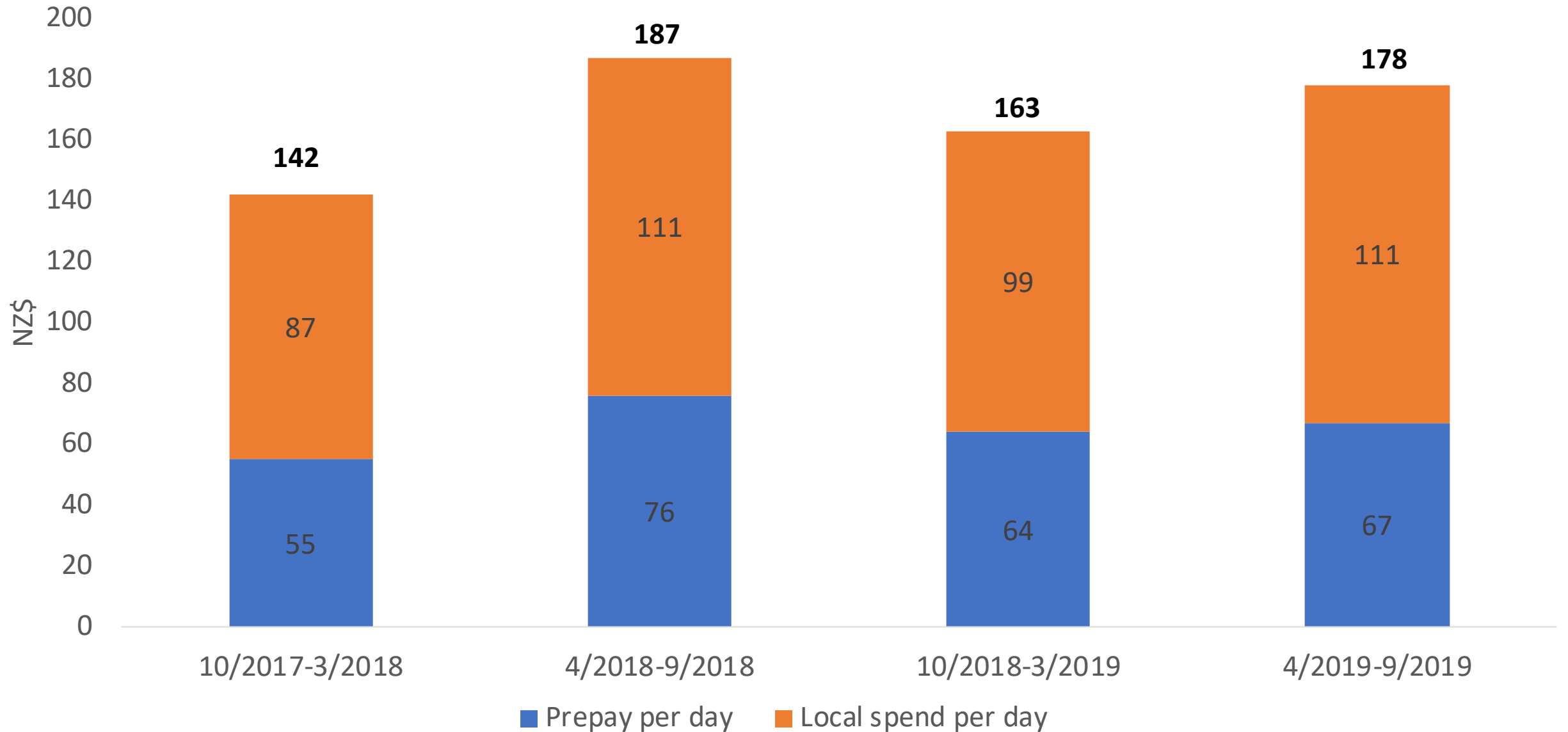
Local expenditure per person per day

Expenditure Items	Mean (NZ\$)	(% of spend)
Accommodation	37.9	34.1
Restaurants, Cafes & Bars	27.4	24.6
Vehicle Rental	11.1	10.0
Activities (e.g. water sports, sightseeing)	11.1	9.9
Groceries	8.6	7.7
Shopping (e.g. souvenirs, clothes)	4.7	4.2
Petrol	4.5	4.0
Local arts and crafts	2.0	1.8
Internet and telecommunication	1.6	1.4
Donations	1.5	1.4
Other	0.5	0.4
Services (e.g., massages/hairdressing)	0.4	0.4

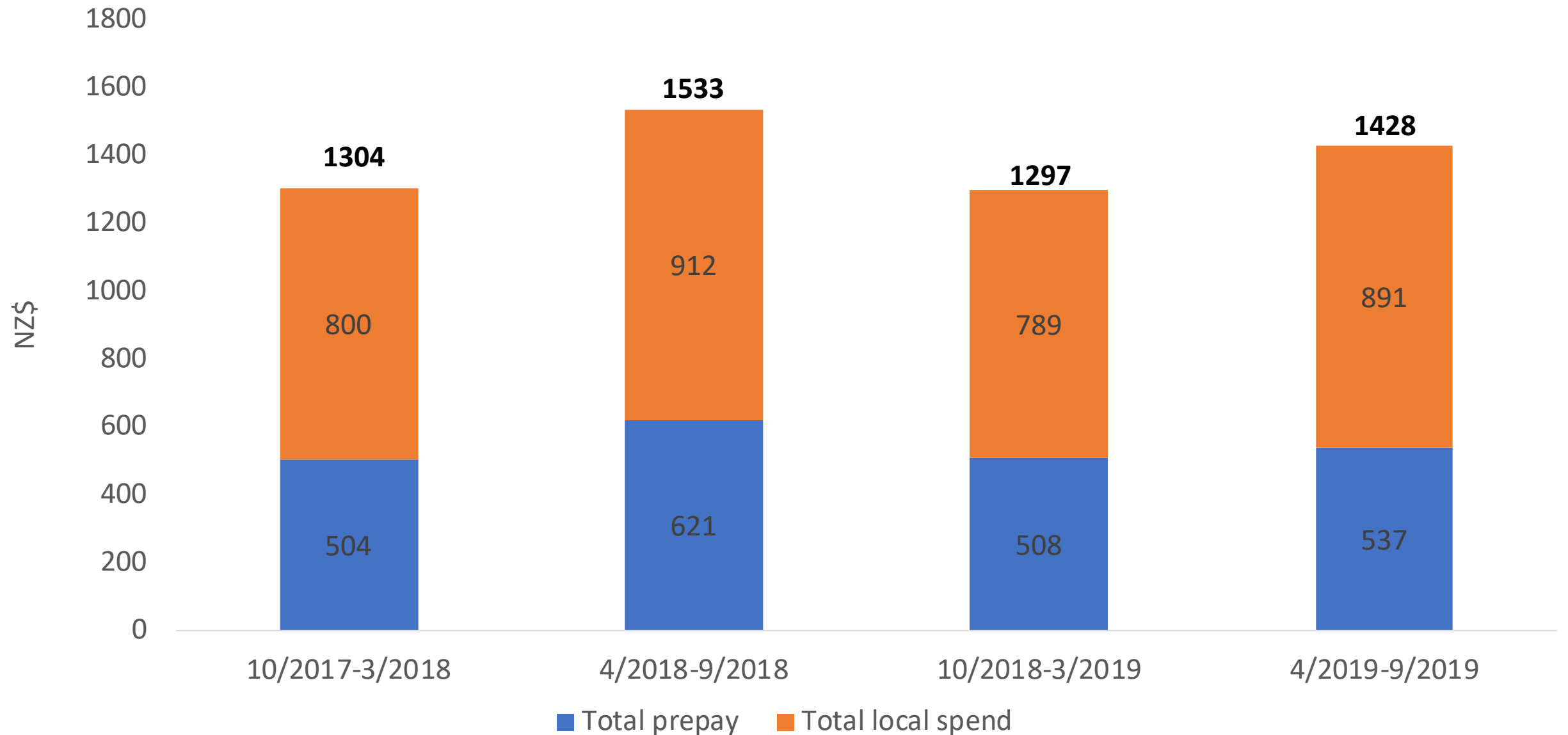


Each visitor spends on average a total of **NZ\$111** per day **while** in Niue

Prepay and local spend per person per day



Total spend per person per visit



Contribution to the Niuean economy

	Pre-paid spend flowing into Niue	+	In-country spend	=	Total spend
Per day	NZ\$67		NZ\$111		NZ\$178
Whole trip	NZ\$537		NZ\$891		NZ\$1,428

NZ\$1,428
Per visit



10,000*
visitors



NZ\$14.28m
Total value

Expenditure – Regional Comparison (NZ\$)

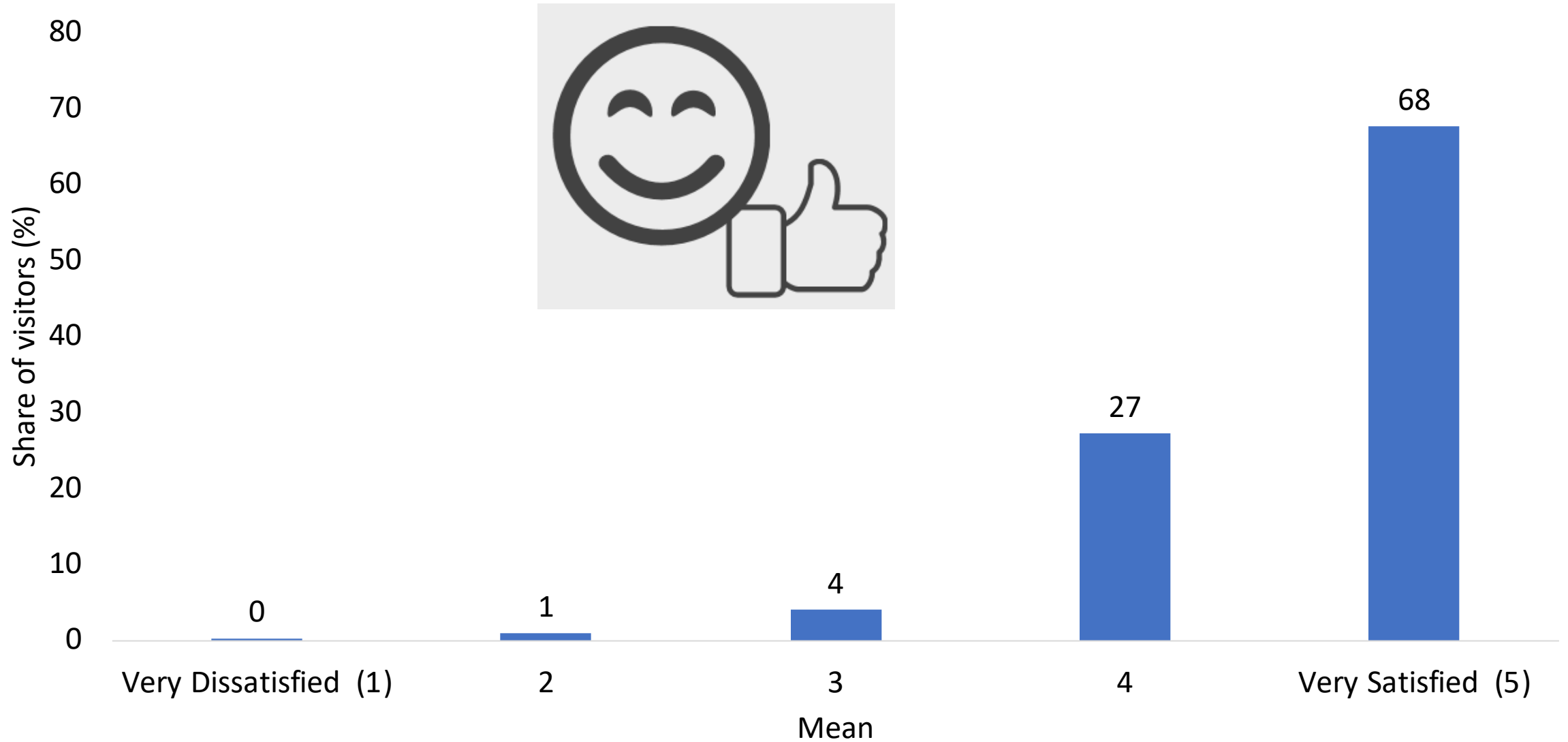
	Cook Islands	Samoa	Vanuatu	Niue	Solomon Islands	PNG	Yap
Survey period	Apr to Jun 2019	Jan to Dec 2018	Jan - Dec 2018	Oct 2018 to Mar 2019	Jan - Dec 2018	Jan - Dec 2018	Jan 2015 - Dec 2018
In country spend per person per day	\$154	\$88	\$136	\$99	\$104	\$120	\$163
Total spend per person per person per day	\$259	\$180	\$278	\$163	\$241	\$321	\$325
Total spend per person per visit	\$2,069	\$1,476	\$2,247	\$1,297	\$2,370	\$3,144	\$2,273



Visitor satisfaction

Most and least appealing elements of the visit, overall satisfaction

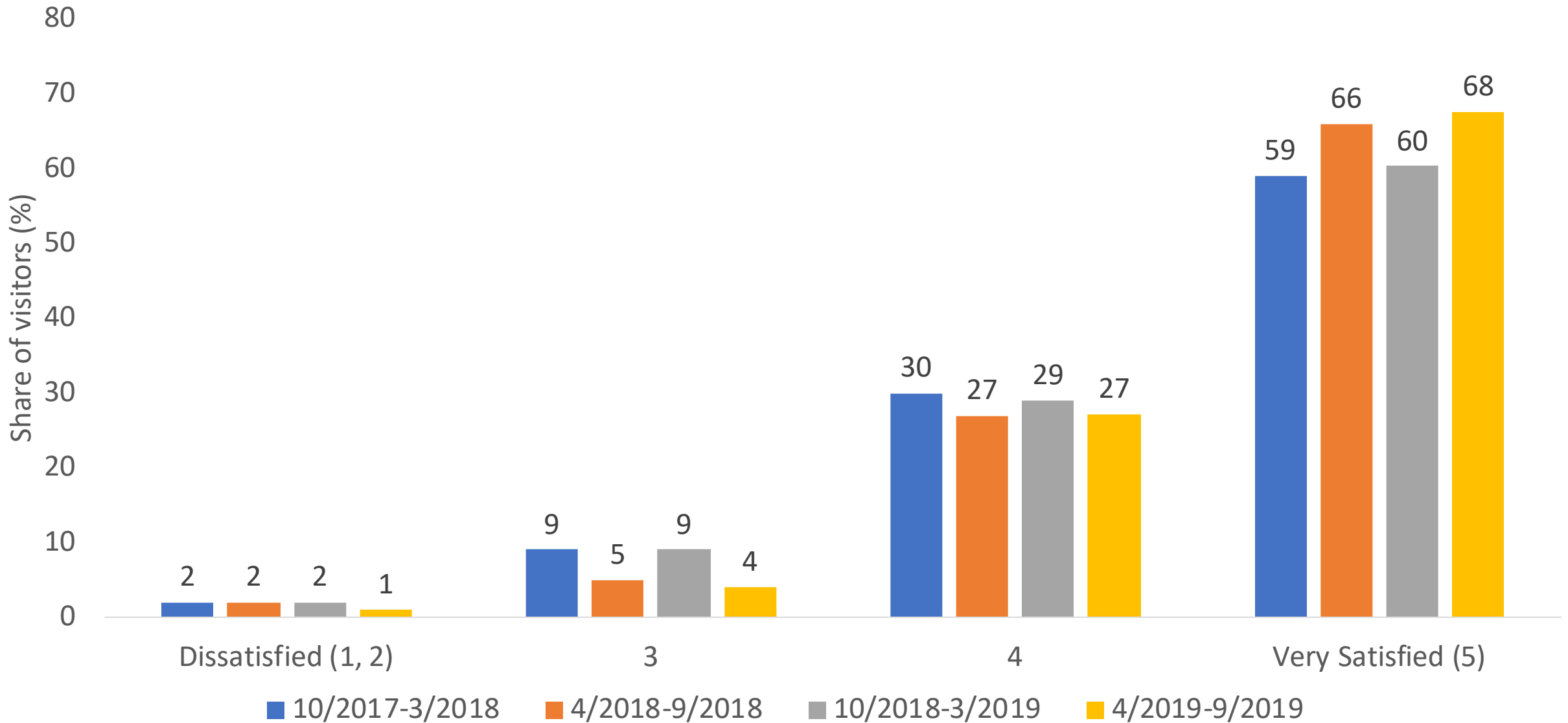
Overall satisfaction



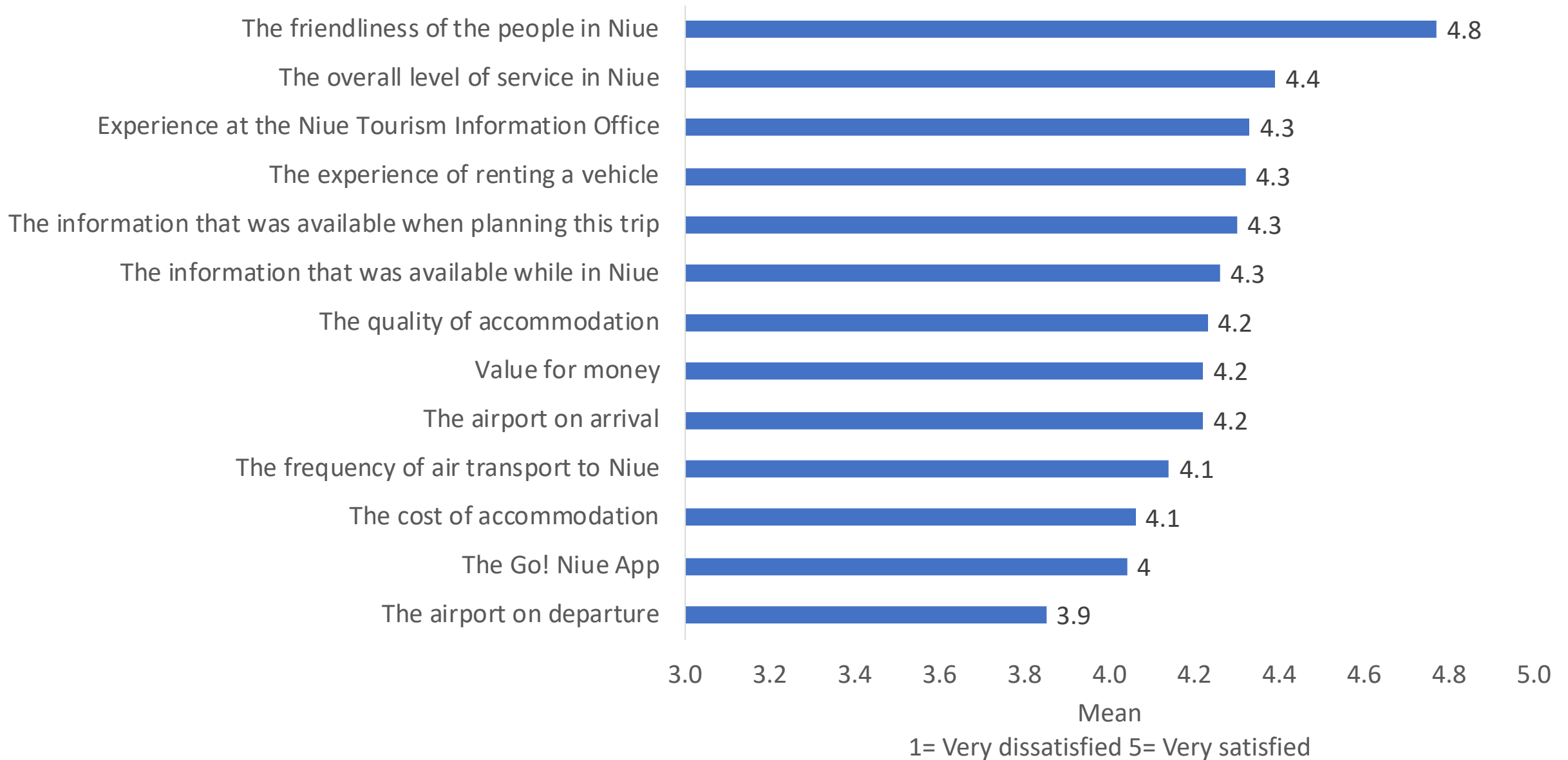
Overall Satisfaction (last annual data)

Country/State	Satisfied	V. Satisfied	Total
Cook Islands	23	70	93
Niue	27	66	93
Yap	33	57	90
Samoa	32	54	86
Vanuatu	34	52	86
PNG			73
Solomon Is	39	28	67

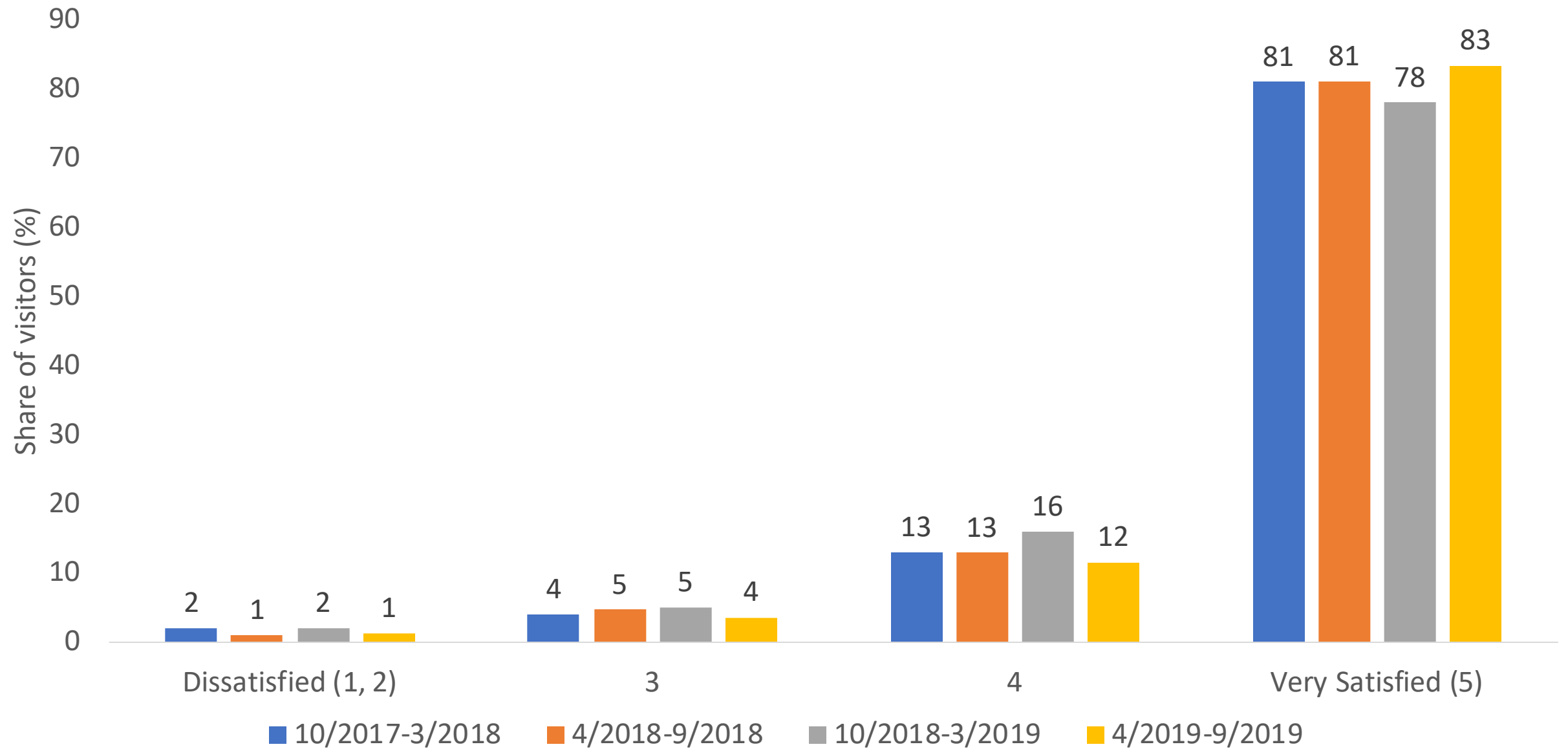
Overall satisfaction



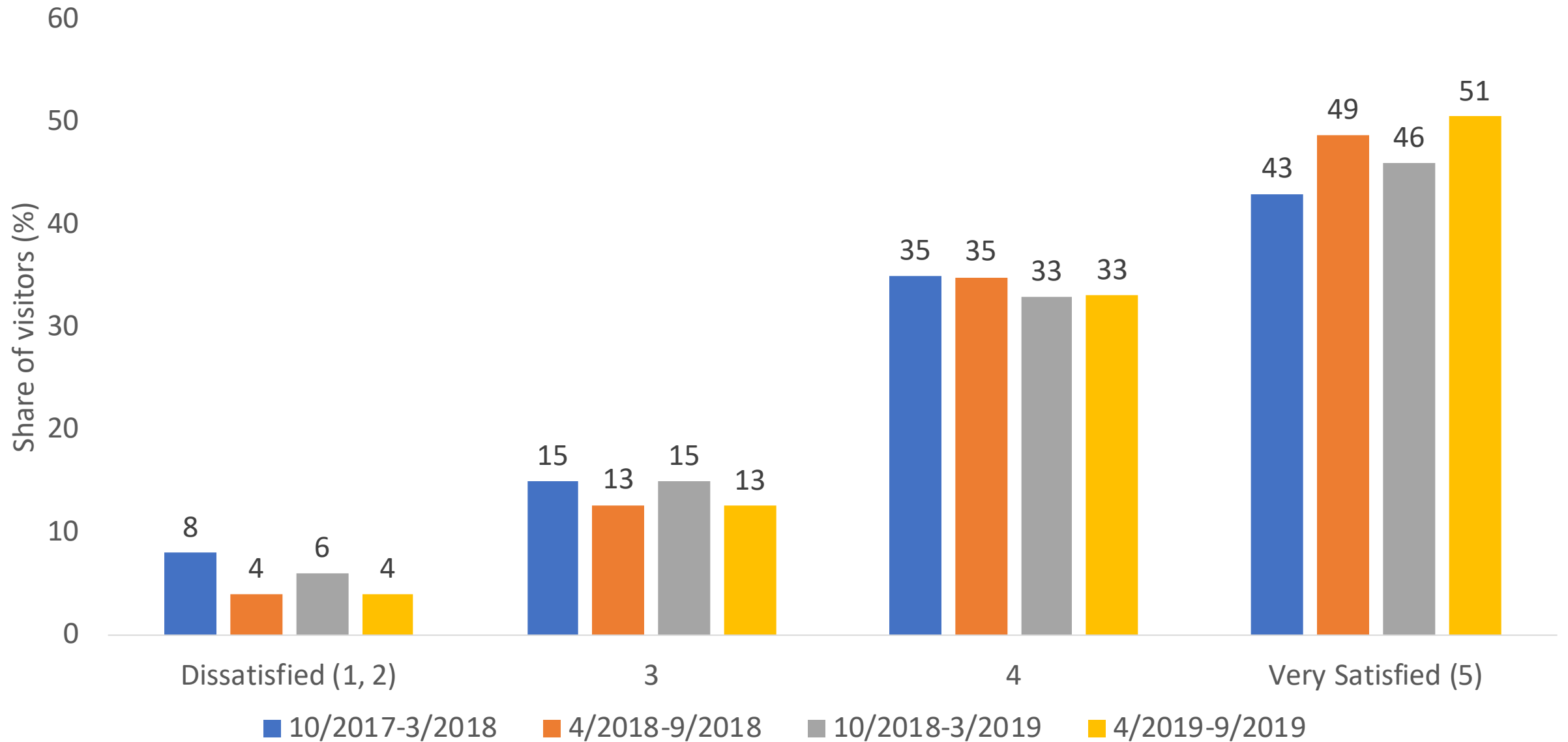
Satisfaction with Elements of the Niue Visit



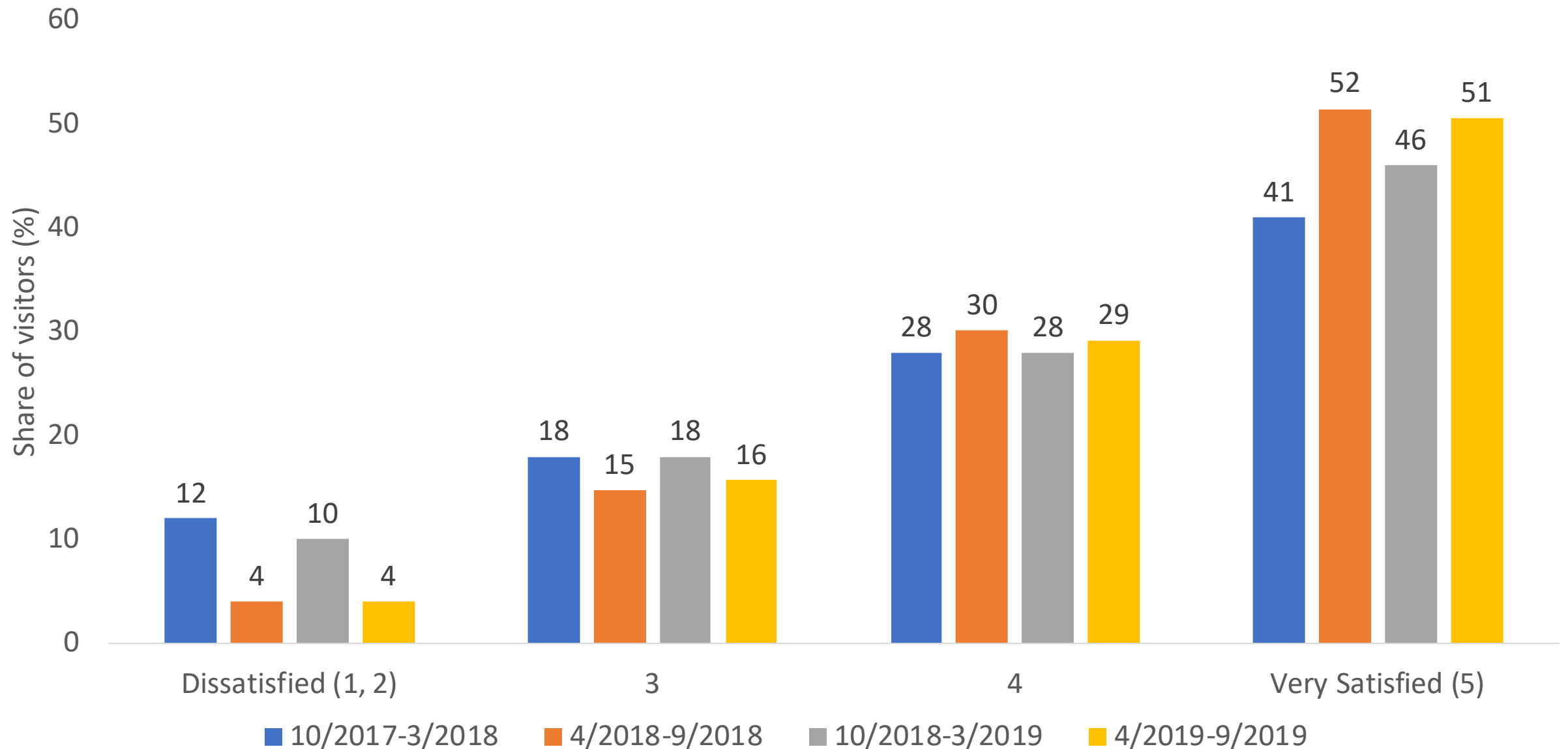
Friendliness of people in Niue



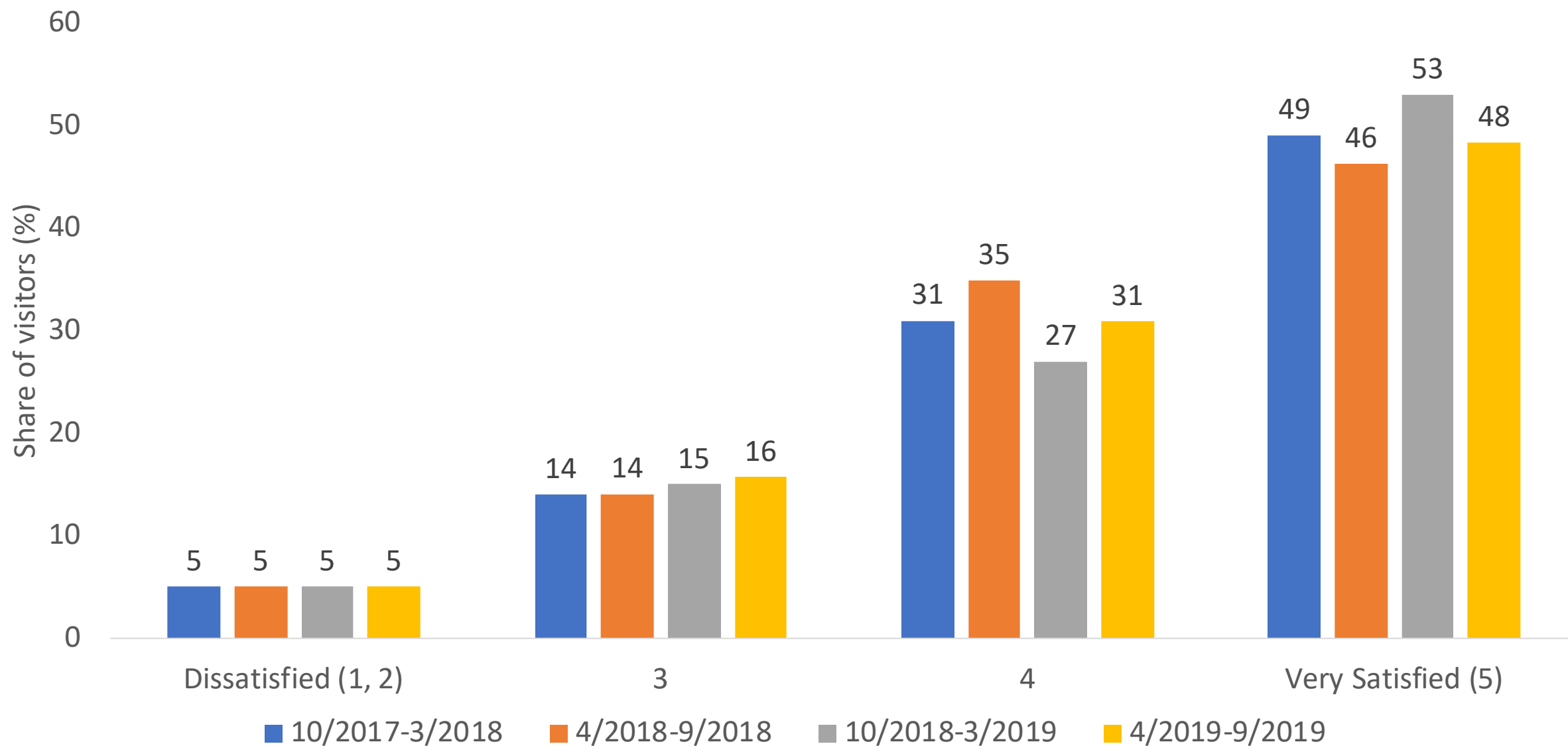
Information available prior to visit



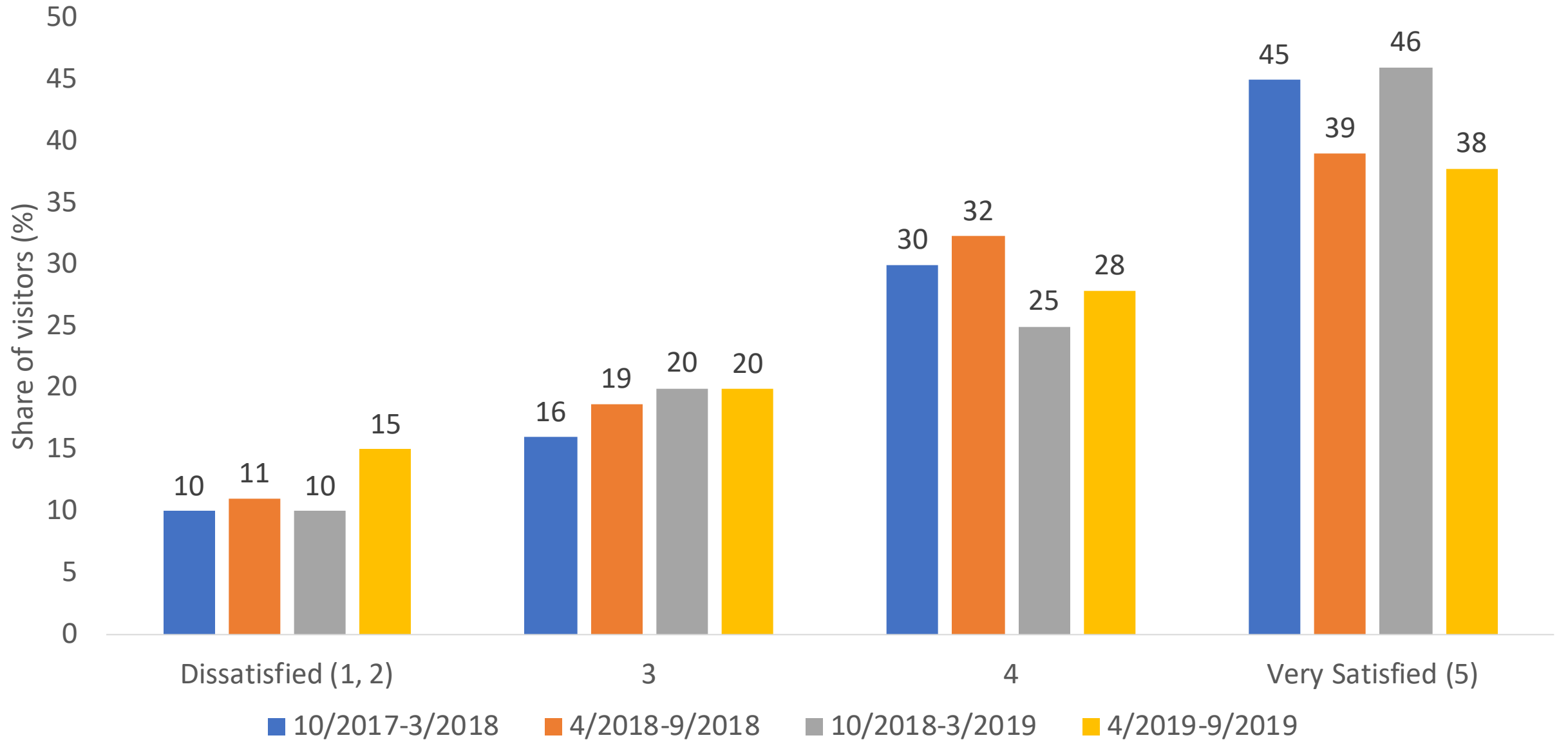
Information available while in Niue



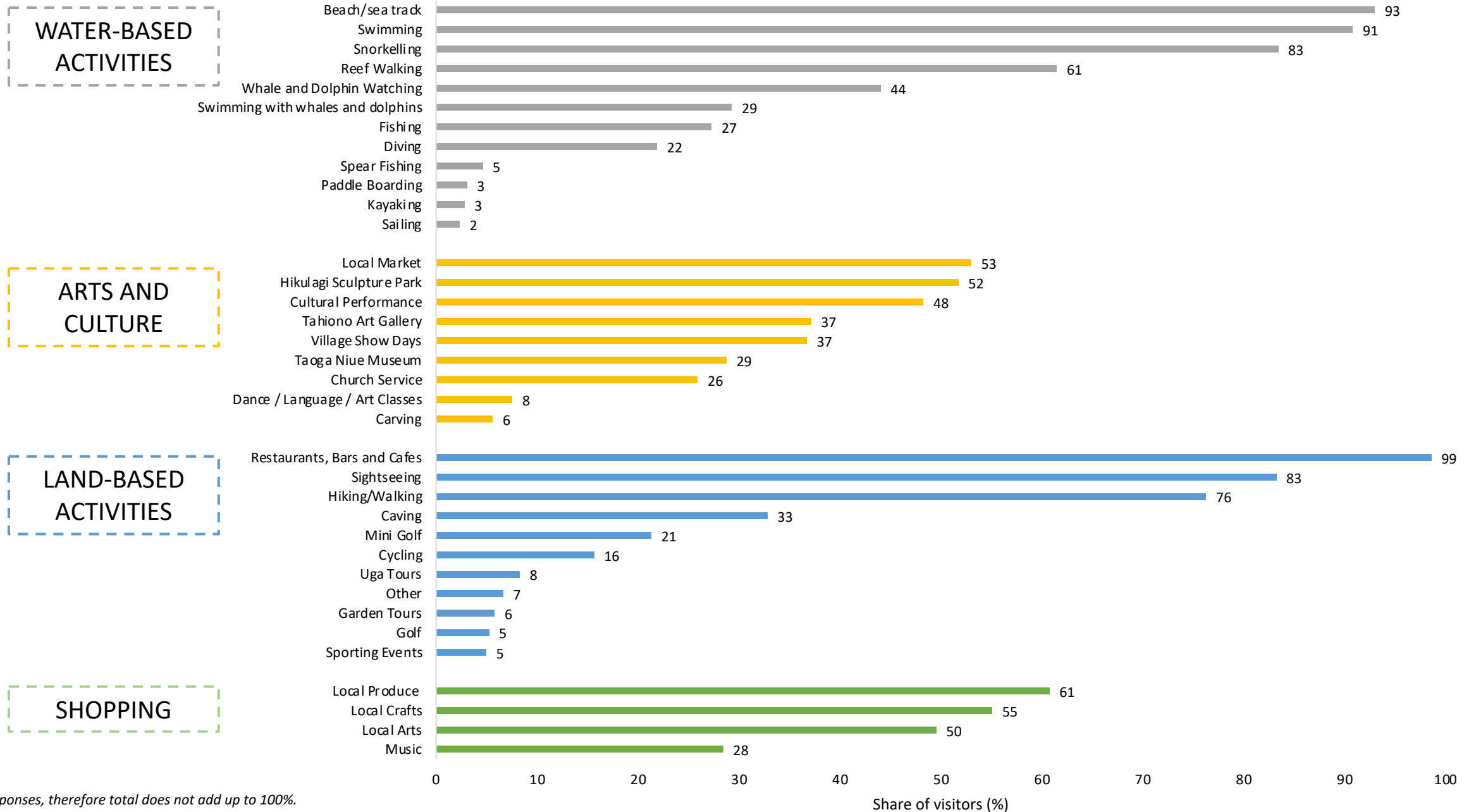
Experience of the airport on arrival



Airport on departure



Degree of participation in activities



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

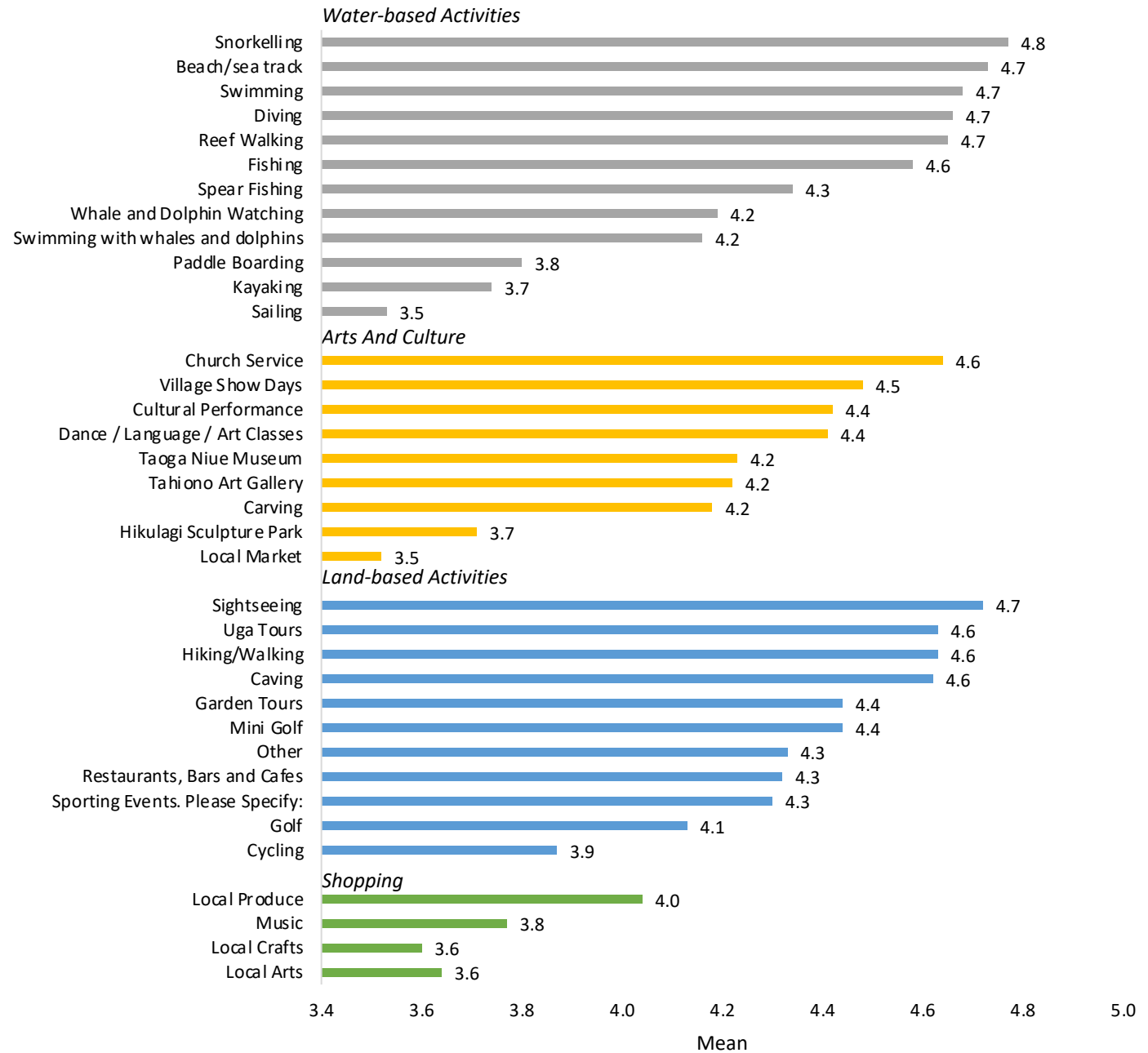
Satisfaction with activities

**WATER-BASED
ACTIVITIES**
AVERAGE 4.3

**ARTS AND
CULTURE**
AVERAGE 4.2

**LAND-BASED
ACTIVITIES**
AVERAGE 4.4

SHOPPING
AVERAGE 3.8



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

Top 3 most appealing aspects

46%

Environment and
cleanliness

42%

Activities &
attractions

36%

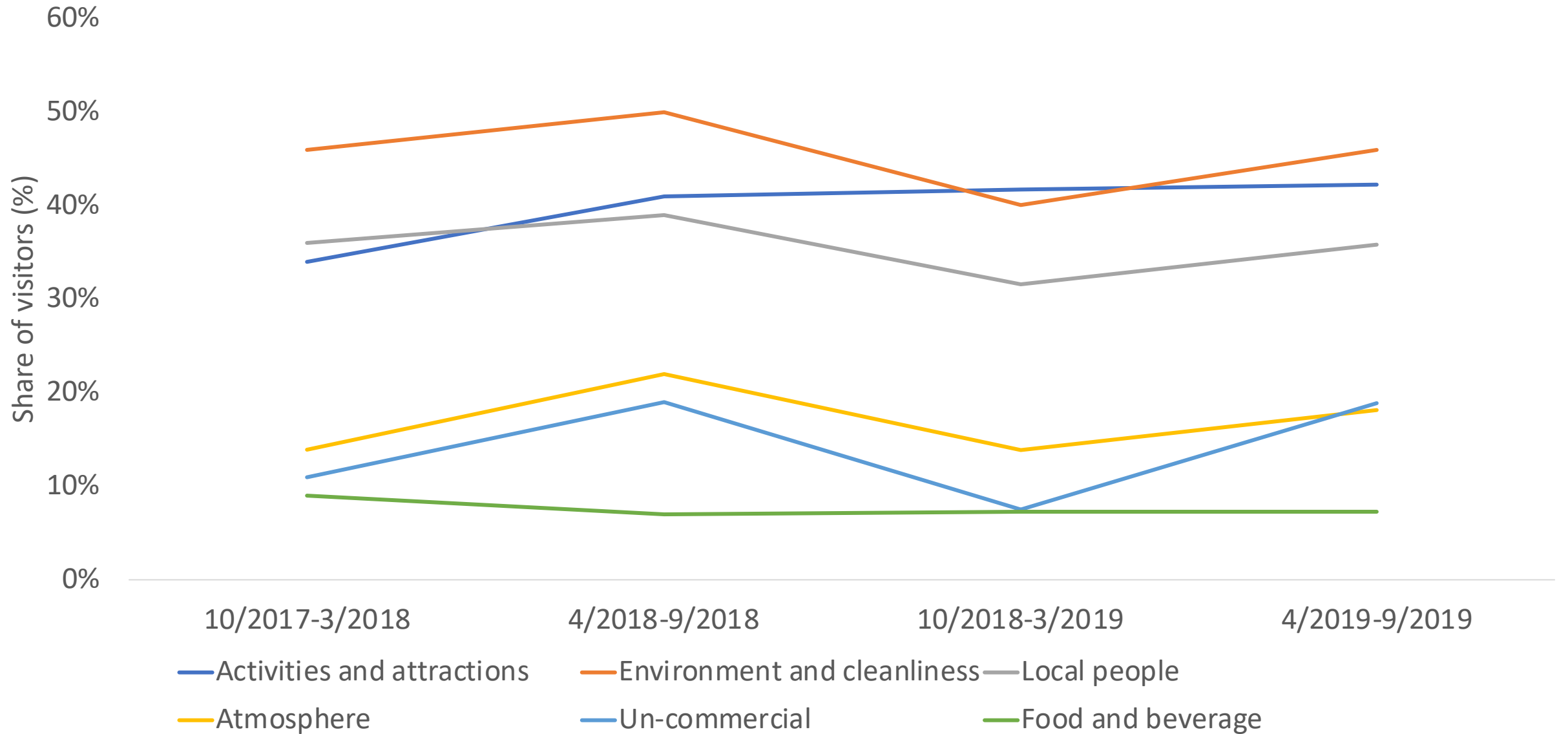
Local
people

Most appealing aspects

Themes	Share of respondents (%)
Environment and cleanliness	46%
Activities and attractions	42%
Local people	36%
Un-commercial	19%
Atmosphere	18%
Food and beverage	7%
Weather	5%
Accommodation	4%
Culture	4%
Public facilities	3%
Level of service	3%
Convenience	2%
Overall good experience	2%
Safety	2%

Note: Share of respondents who made a comment that falls into each theme. Respondents could give more than one answer, so total does not add up to 100%.

Most appealing aspects



Most appealing aspects

Environment & cleanliness (46%)

“Beautiful Pacific island. I love all the sea tracks. My snorkelling and diving experiences were amazing. The reef is beautiful and healthy. Please continue to protect your environment because it's what makes your island a Pacific paradise. The fact that humpback whales and spinner dolphins come to your shores just proves how amazing your island is.”

“Beautiful, untouched, clear waters. I fell in love instantly.”

“Coral, rock pools, lava/petrified coral formations.”

“Beautiful, clean and safe environment. Friendly people.”

“Clear warm water, great walks, lack of commercialism, really friendly people, great attitude, no graffiti, limited amount of rubbish around.”

Most appealing aspects

Activities & attractions (42%)

“All the sea walks, chasms, arches, snorkelling.”

“Amazing FREE water activities - snorkeling and swimming in pools, caves and chasms. Absolutely beautiful and a privilege to participate in.”

“Diving, water clarity and visibility.”

“Ease of whale watching from the lookout at the motel. We saw whales and dolphins almost every day for 14 days!!”

“Fishing in Niue and visiting the Archers.”

“Great sea tracks, snorkelling in incredibly clear water.”

Most appealing aspects

Local people (36%)

“How genuine and friendly the people were. The weather was great. The water amazing.”

“The friendliness of everyone on the island made me feel very welcome, especially as I was travelling by myself.”

“Just the lovely friendliness of Niue people once again and the fact it is non commercial.”

“I enjoyed the fact that there weren't people every where and that all the locals were friendly and helpful. It was a relaxing break with no pressure of shops etc and people trying to sell you stuff.”

“Love the swimming the cleanliness and clear waters that Niue has to offer. People are so friendly as they wave to you all around the island.”

Most appealing aspects

Other comments on most appealing aspects

*“Not too many tourists and the **general ambience of the place.**”*

*“**Not far from NZ** and a great place to chill out and unwind. Thought supermarket was well stocked and **the local restaurants** were great.”*

*“**Not over commercialised**, relaxed and friendly.”*

*“**Pace of live**, no pressures, friendliness, no queues.”*

*“**Relaxed environment**, wonderful snorkeling, **easy to get around**, friendly relaxed people, island night food at Hio cafe.”*

*“**The freedom to explore and carry out the walking/hiking and snorkeling the chasms.**”*

Top 3 least appealing aspects

42%

Public services,
facilities and
infrastructure

12%

Food and
beverage

10%

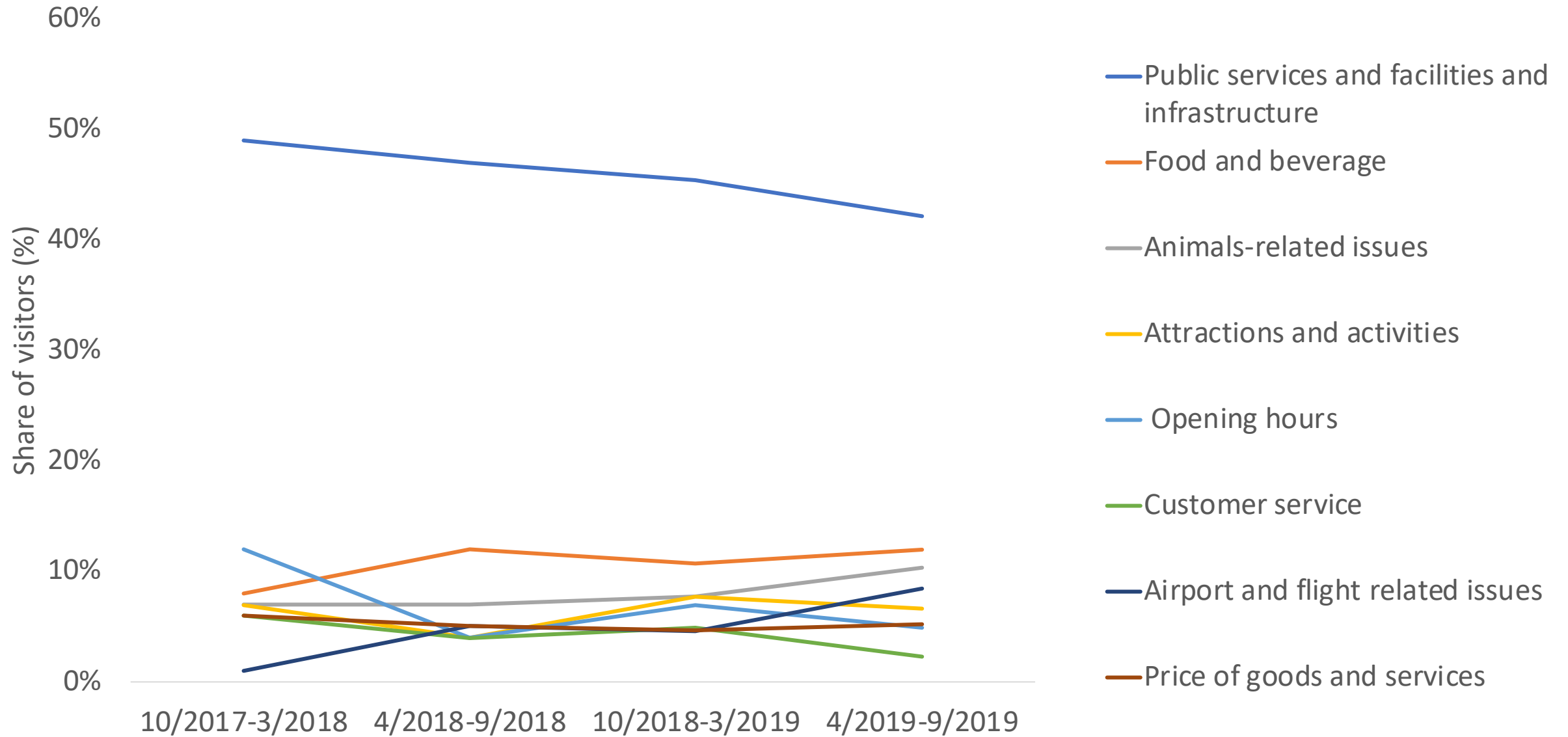
Animal-related
issues: mosquitoes,
flies and stray dogs

Least appealing aspects

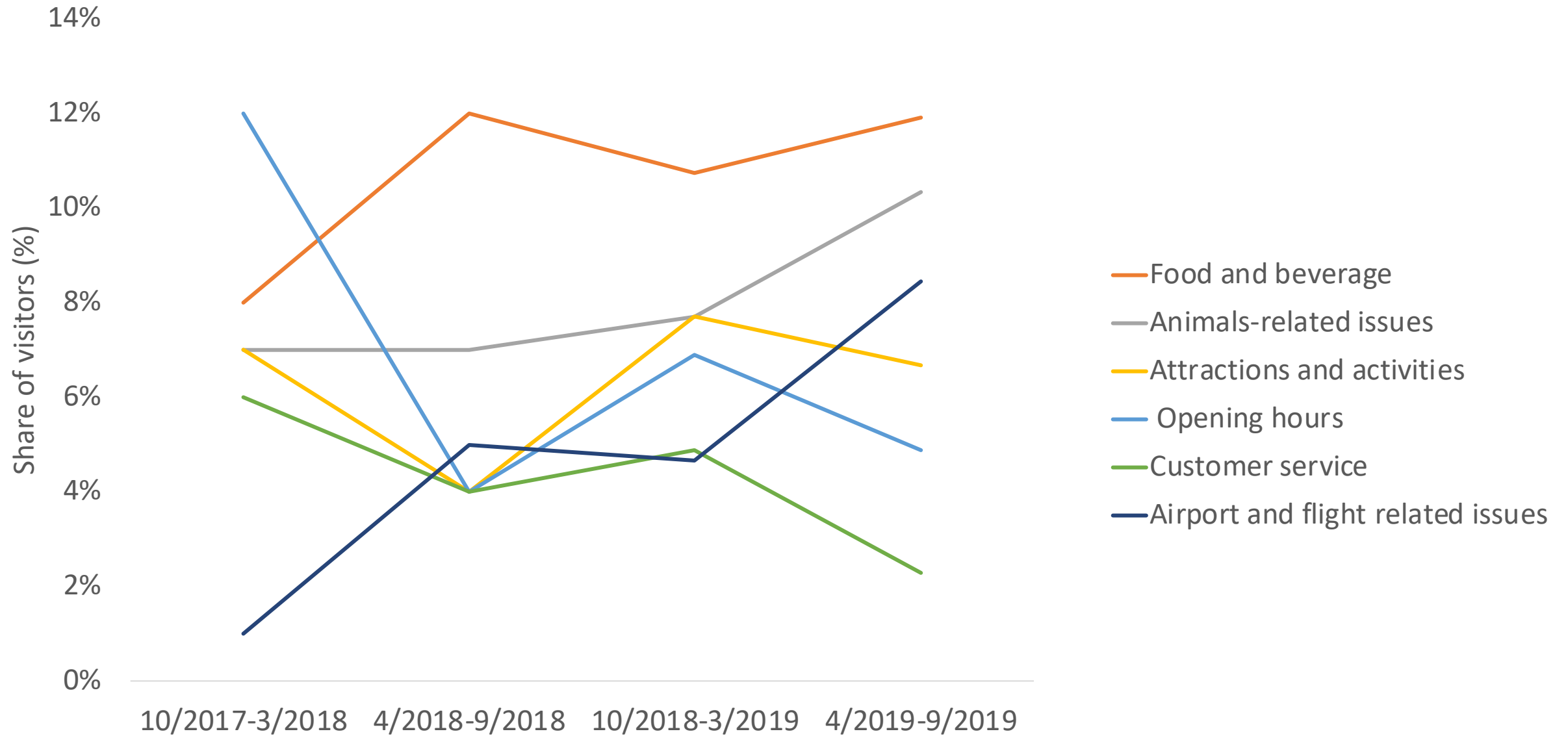
Themes	Share of respondents (%)
Public services, facilities and infrastructure	42
Food and beverage	12
Animal-related issues	10
Airport and flight related issues	8
Attractions and activities	7
Price of goods and services	5
Opening hours	5
Accommodation	4
Abandoned houses and cars	4
Rubbish and taking caring of the natural environment	4
Shopping experience	3
Tourism information	3
Customer service	2
Weather and season	2
Safety	2

Note: Share of respondents who made a comment that falls into each theme. Respondents could give more than one answer, so total does not add up to 100%.

Least appealing aspects



Least appealing aspects



Least appealing aspects

Public services, facilities and infrastructure (42%)

“Roads are pretty bad to shocking. The queue when leaving Niue at the airport was dreadful. Please get a better system to check in.”

“Potholes! Quite stressful driving around the east of the island.”

“Internet service - even though we were on holiday being self-employed one still has to work at times.”

“The lack of WIFI, however, it was nice to disconnect from social media for a while.”

“Expensive Accommodation, lack of public transport, bad road condition.”

Least appealing aspects

Food and beverage (12%)

“Food. It would be interesting to see more local foods rather than copies of other cuisines.”

“Lack of fresh local fruit and fish available for sale.”

“The limited amount of food options i.e. we wanted to buy meat but had to buy a bigger piece than needed, there were three of us and 1kg was too much. Perhaps smaller packs would be better and sell more because people can buy more than one pack if needed for more people.”

“Was only one quality restaurant which was hard to get into. Only a few quality cafes.”

Least appealing aspects

Animal-related issues: mosquitoes, flies and stray dogs (10%)

“Chased by packs of dogs while cycling around on roads.”

“The number of dogs around the island, mainly under no control, attacking cyclist (and even injure them) - something seriously should be done about it (not just lip service).”

“Roosters crowing in the middle of the night!!”

“Number of street cats coming into restaurants and begging for food.”

“The dogs need to be better cared for, some had deformed paws and were covered in fleas, very sad.”

Least appealing aspects

Other comments

“Departure day was a bit of a drama, but the island was very busy so understandable. The whole check-in and boarding experience could be a lot better - but that is an airline issue.”

“We were not told the fish spawning season was still in progress and therefore some swimming spots were closed.”

“Taxi seemed expensive - don't know if a across/around island bus shuttle service would be a good business for someone.”

“Most things seem to be closed while we were there.”

“Abandoned buildings/cars are an eyesore that diminish Niue's beauty.”

“A noticeable increase of roadside rubbish since I was there a year ago.”

Least Appealing - Environmental Quality

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

Suggestions for improvement



56% provided
suggestions for
improvements

- 32%** Public services and infrastructure
- 12%** More information
- 11%** Food and beverage
- 9%** Attractions and activities
- 9%** Flight related issues
- 5%** Accommodation
- 5%** Mosquitoes, flies and stray, noise animals
- 5%** Opening hours
- 4%** Shops and shopping experience
- 3%** Stay longer

Suggestions for improvement

“The roads need to be done up, there were some villages we drove through and they were really bad with potholes.”

“Road infrastructure and better maps and signage.”

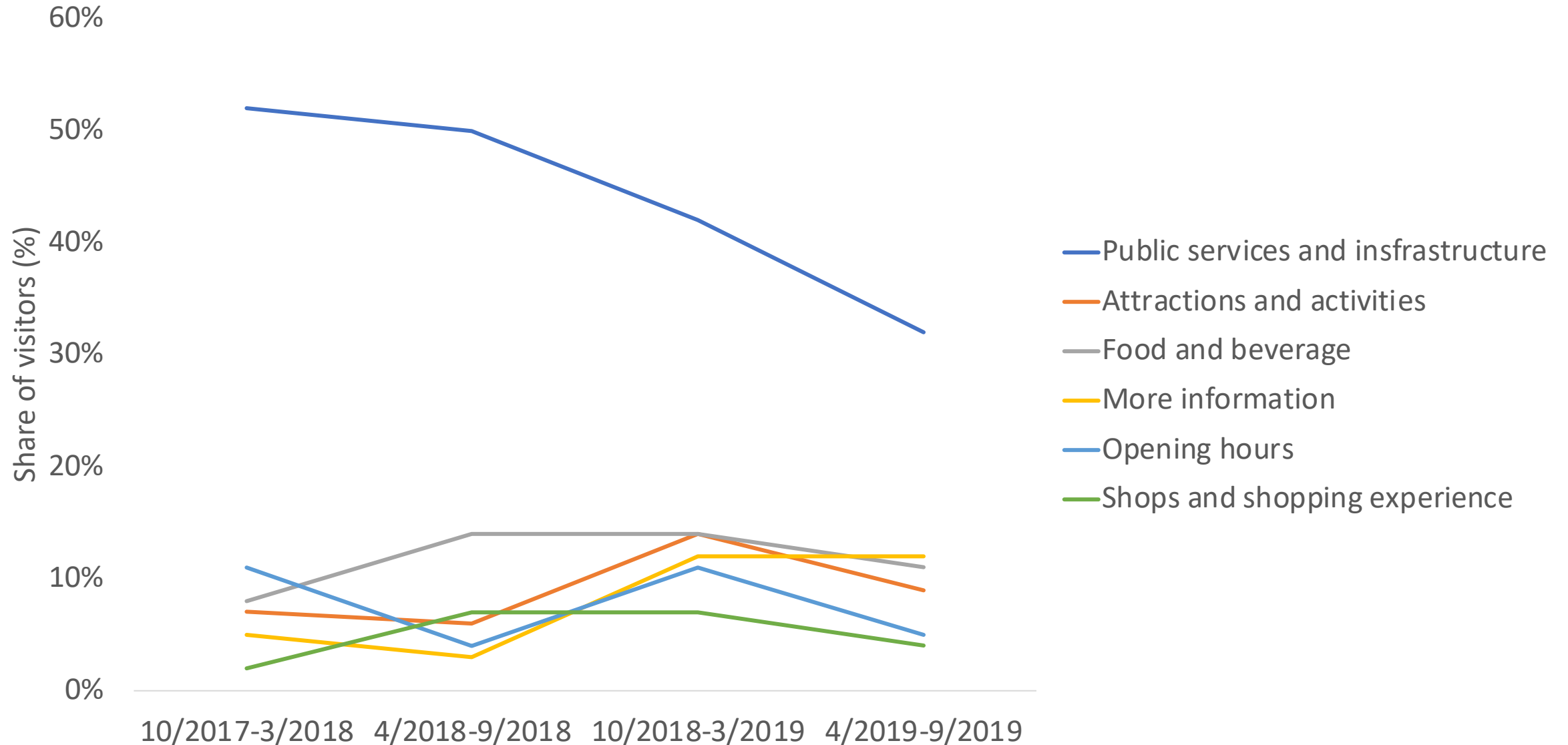
“More information pre-arrival: which restaurants are open, availability of food in supermarket, which swimming areas are open.”

“Also felt we left the island not knowing much about. It should be showcased more: the local culture, legend, dance, singing, beliefs and value”

“The careful consideration of wasteful hotel cleaning practices and more emphasis on Niue being an ecological haven. More information on pre-European history and natural history in the in museum.”

“Need to have Go Niue App updated regularly still have dates from 2018!”

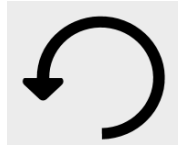
Suggestions for improvement



Suggestions for improvement

	10/2017-3/2018	4/2018-9/2018	10/2018-3/2019	4/2019-9/2019
Public services and infrastructure	52%	50%	42%	32%
Attractions and activities	7%	6%	14%	9%
Food and beverage	8%	14%	14%	11%
More information	5%	3%	12%	12%
Opening hours	11%	4%	11%	5%
Shops and shopping experience	2%	7%	7%	4%

Return to Niue



90% of visitors indicated
that they would consider
re-visiting Niue

Reasons not to return

Have already revisited

Visit other destinations

Limited attractions and activities

Expensive

Poor facilities and infrastructure

Health and age problems

Too far

Not suitable for older travellers

Flight related issues

Food and beverage

Reasons not to return to Niue

“Been there done that.”

“I enjoy discovering new places. Don’t tend to go back to places I’ve visited. However would recommend it to others as a place to visit.”

“If the cheaper accommodation and internet are available, I would revisit Niue.”

“Not enough places for us to snorkel and swim which is what we like to do most on our tropical holidays and the quality of the coral and sea life was less than we have seen elsewhere.”

“We saw everything, did every sea walk we went everywhere. The flight cost compared to other islands is very high.”

“Accommodation substandard, paths and steps to reef difficult to walk on, I have seen it and there are many other places to explore.”

Recommending Niue



96% of visitors said that they would recommend the destination to their family and friends

Reasons not to recommend

Not suitable for everyone/old travellers

Keep it as a secret

Limited attractions and activities

Not value for money

Other Pacific Islands are better

Poor facilities and infrastructure construction

Reasons not to recommend Niue

“Because I don't want more people to go there and wreck the place.”

“No, I don't want lots of people to go and spoil it.”

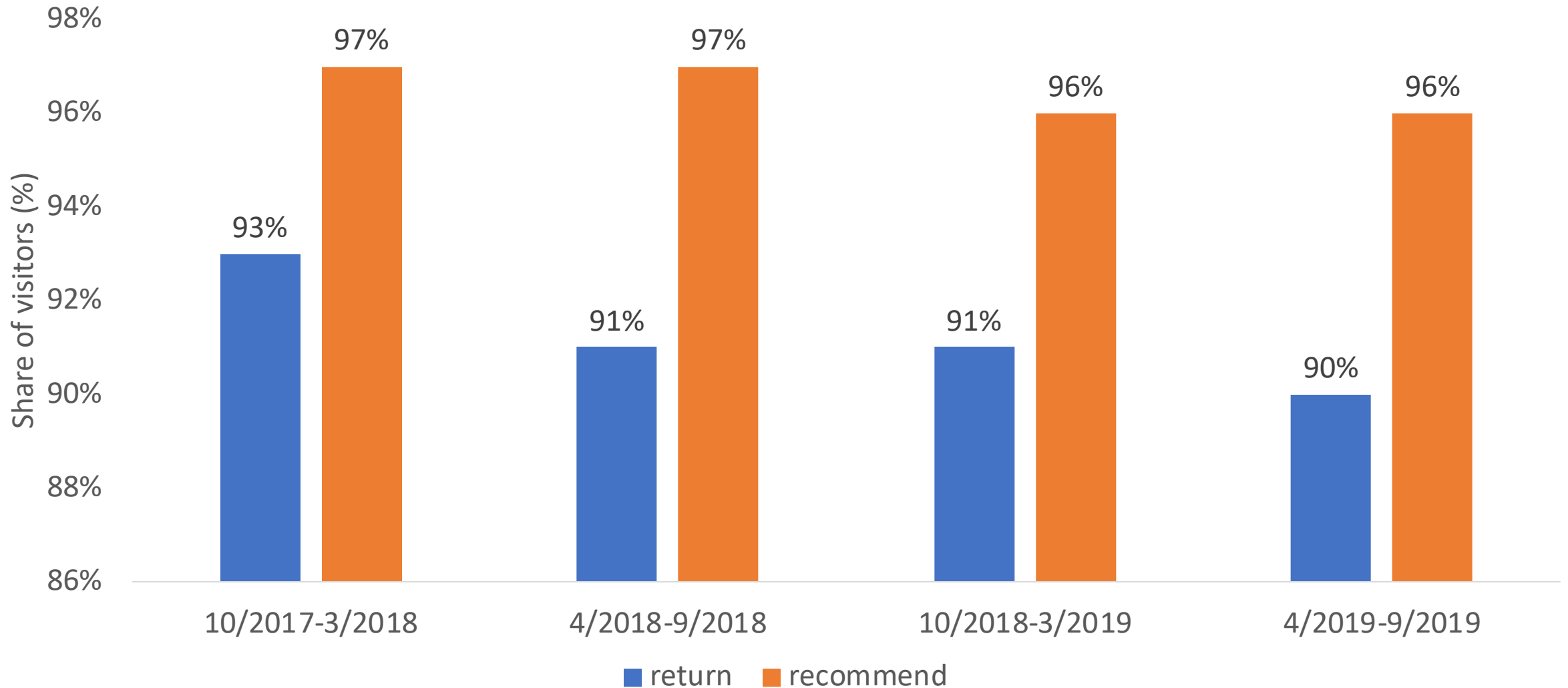
“For the lack of good snorkelling and swimming.”

“Would only recommend if they were coming for the diving.”

“Very expensive, very little to do. It is interesting to visit to get an understanding of how different Niue is from other Pacific islands, but as a tourist destination no. They would be very disappointed.”

“We are not fond of activities on the water, would recommend only if others would go out on a boat for activities.”

Willingness to Return and Recommend to Others



KEY TAKEAWAYS

- A high value, well educated, older visitor looking for something different
- Visitors are passionate about Niue and want to give feedback
- Word of mouth remains vital
- Internet is growing in importance as information source and dominates booking
- Information is vital in and outside Niue, make sure it is up to date

KEY TAKEAWAYS

- Visitor satisfaction is key and is among the highest in the 7 PTDI countries
- Visitor spend is relatively low – people want to spend more
- Opportunities to grow linkages and yield – focus on culture, local produce and products, community experiences
- Infrastructure challenges are emerging (airport)
- Strong willingness to recommend.

Fakaaue lahi

Thank you



Simon Milne, Caroline Qi, Mindy Sun, Sam Li
simon.milne@aut.ac.nz
<http://www.nztri.org/>

Change in visitor spend – compared to last Annual Data

	Total economic impact change
Samoa (Jan to Dec 2018 VS Jan to Jun 2019)	2.2%
Vanuatu (Jan to Dec 2018 VS Jan to Jun 2019)	-4.2%
Solomon Islands (Jan to Dec 2018 VS Jan to Jun 2019)	-13.9%
Niue (Oct 2018 – Mar 2019 VS Apr to Sep 2019)	-6.8%
Cook Islands (Jan to Dec 2018 VS Jul to Sep 2019)	-9.1%
PNG (Jan to Dec 2018 VS Jan to Jun 2019)	-4.3%

Local expenditure by country of origin

Expenditure items	New Zealand n=900	Other (including Aus) n=130
Accommodation	37.6	43.5
Restaurants, Cafes & Bars	28.2	24.2
Activities (e.g. water sports, sightseeing)	11.5	8.9
Vehicle Rental	11.1	11.5
Groceries	8.4	10.6
Petrol	4.5	4.6
Shopping (e.g. souvenirs, clothes)	4.4	6.5
Local arts and crafts	1.9	3.0
Internet and telecommunication	1.5	2.3
Donations	1.3	2.6
Services (e.g., massages/hairdressing)	0.5	0.1
Other	0.4	1.1

Totals
New Zealand NZ\$111
Other NZ\$119

Most appealing aspects

	10/2017-3/2018	4/2018-9/2018	10/2018-3/2019	4/2019-9/2019
Activities and attractions	34%	41%	42%	42%
Environment and cleanliness	46%	50%	40%	46%
Local people	36%	39%	32%	36%
Atmosphere	14%	22%	14%	18%
Un-commercial	11%	19%	8%	19%

Least appealing aspects

	10/2017-3/2018	4/2018-9/2018	10/2018-3/2019	4/2019-9/2019
Public services and facilities and infrastructure	49%	47%	45%	42%
Food and beverage	8%	12%	11%	12%
Animals-related issues	7%	7%	8%	10%
Attractions and activities	7%	4%	8%	7%
Opening hours	12%	4%	7%	5%
Customer service	6%	4%	5%	2%
Airport and flight related issues	1%	5%	5%	8%
Price of goods and services	6%	5%	5%	5%