

NIUE INTERNATIONAL VISITOR SURVEY

New Zealand Dive Market Insights

OCT 2017 – MAR 2020

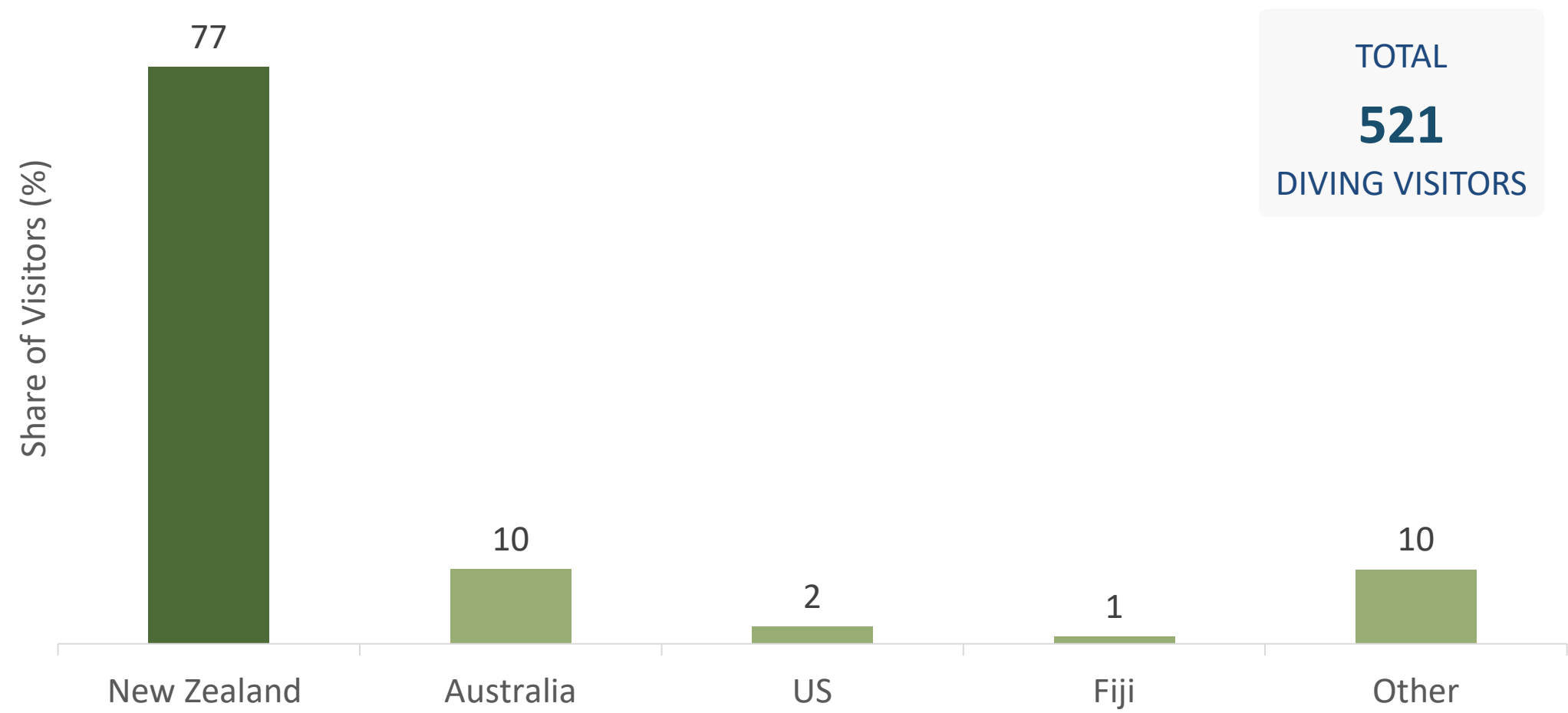


Published December 2021

Background

- The 2017 to 2020 IVS data set is analysed to help us understand the dive market in Niue and particularly the profile of the New Zealand dive market.
- Survey respondents who participated in diving activity during their trip to Niue, and have been residing in New Zealand for 12 months prior to the trip, are identified as NZ diving visitors (labelled as “Dive”).
- Comparisons in expenditure variables are made between NZ diving visitors and NZ non-diving visitors (labelled as “Non-Dive”).
- NB The dataset includes 30 months of data from October 2017 to March 2020.
- All reports from the IVS are available at: www.nztri.org.nz/visitor-research/pacific

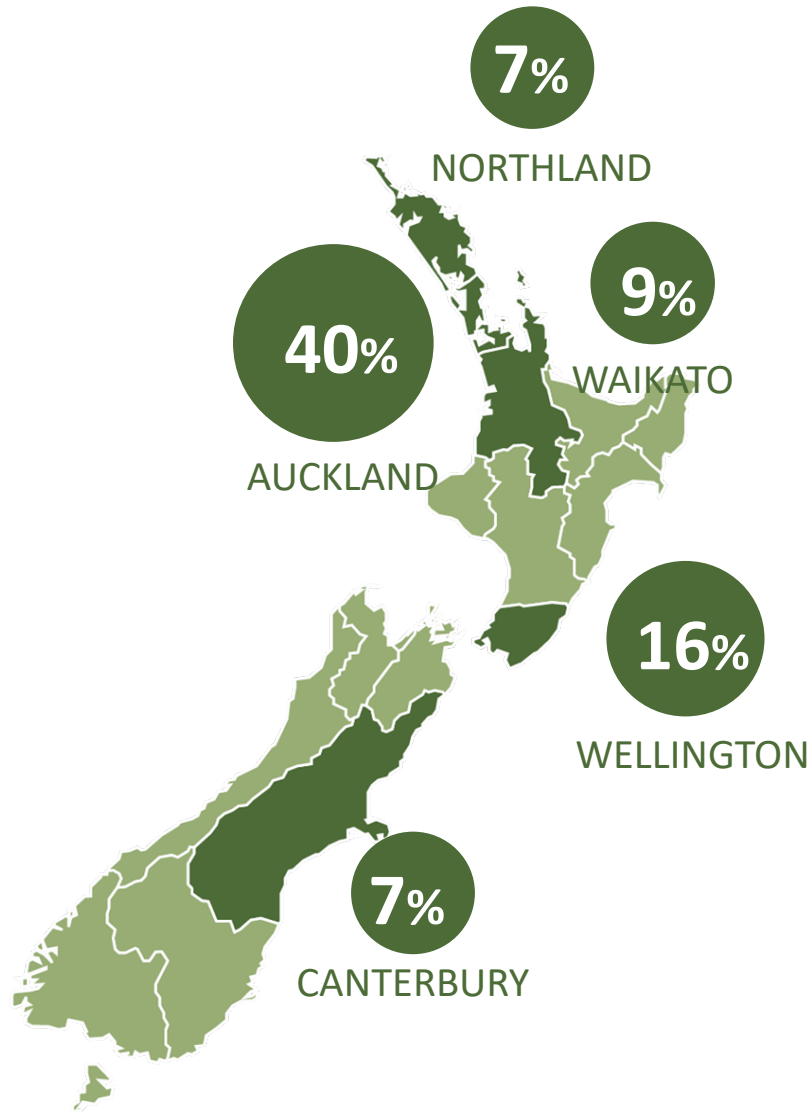
IVS 2017-2020: Over 500 respondents participated in diving activity



The number of surveyed NZ diving visitors is 403 in total. NZ dive visitor numbers in Apr-Sep are significantly higher than in Oct-March



Visitors from Auckland make up the largest part of the NZ dive market.



Auckland, Wellington, Waikato, Northland and Canterbury make up **79%** of all the New Zealand dive market to Niue.

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

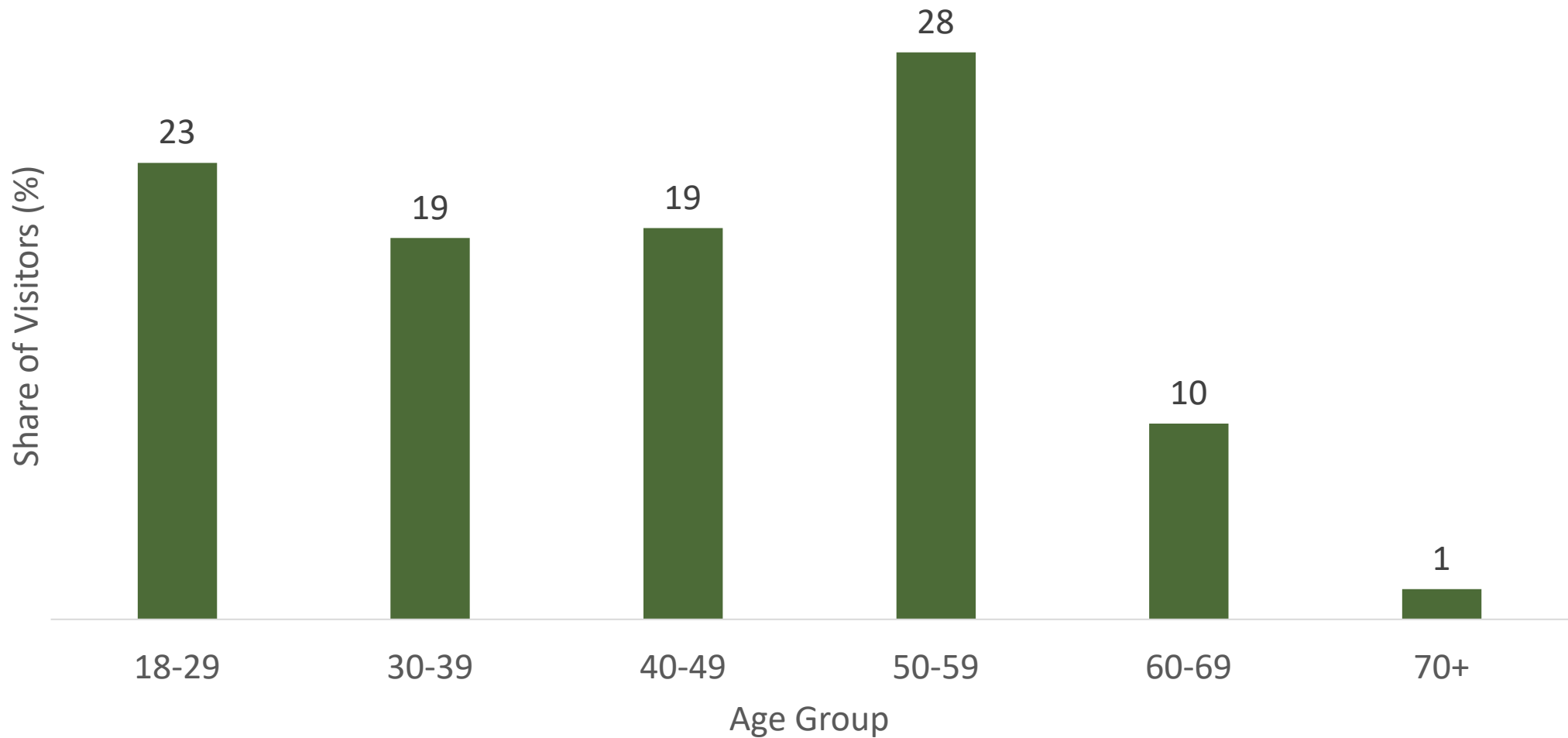


Visitor Spending
and Impact

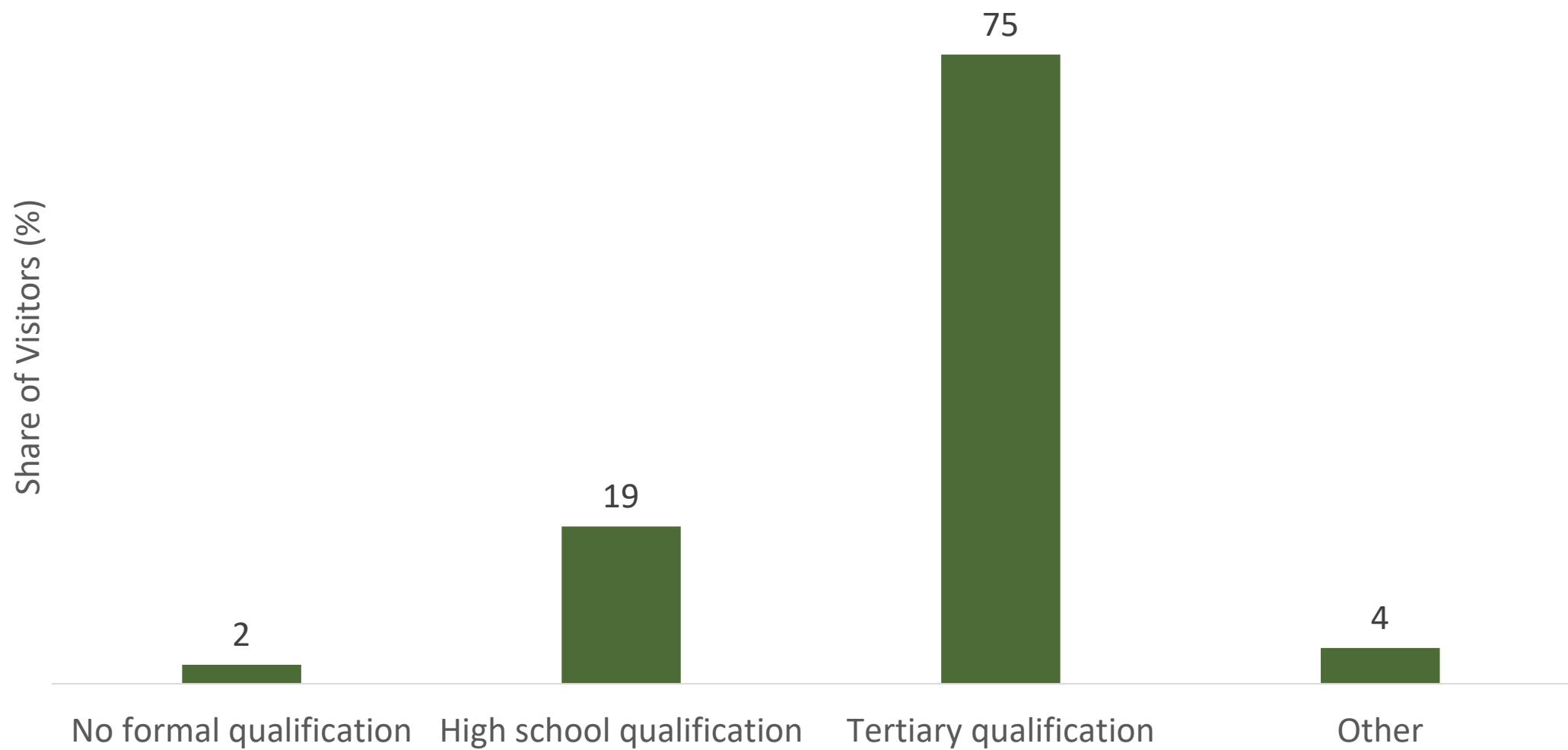


Visitor
Satisfaction

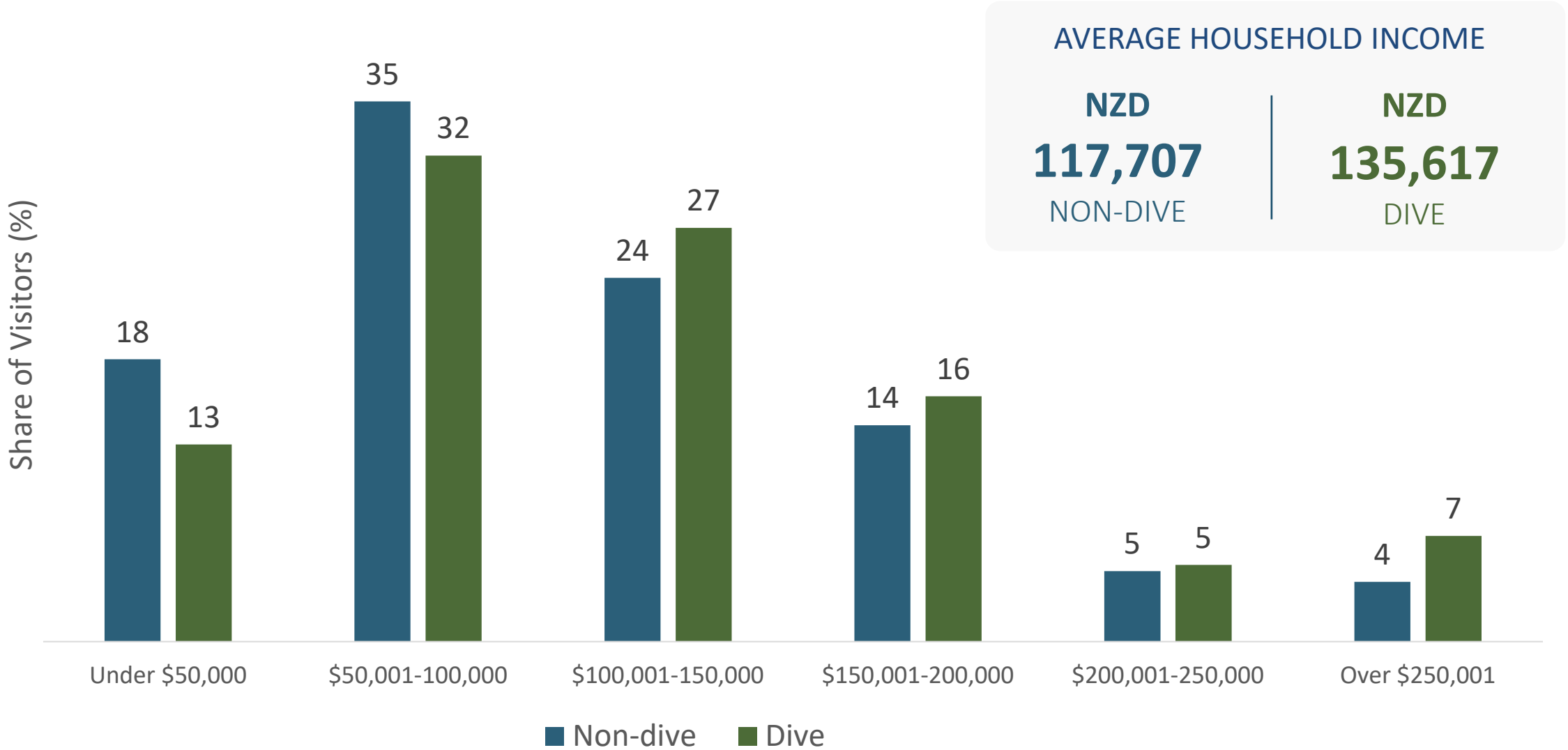
**Visitors aged from 50-59 year old made up 28% of the NZ dive market.
Nearly a quarter (23%) are in the 18-29 age group.**



Three quarters of NZ diving visitors have a tertiary qualification.



The average household income for NZ dive market is considerably higher than the non-dive visitors to Niue.



Note: Percentage figures are rounded

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Profile



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& Preferences



Information &
Decision Making

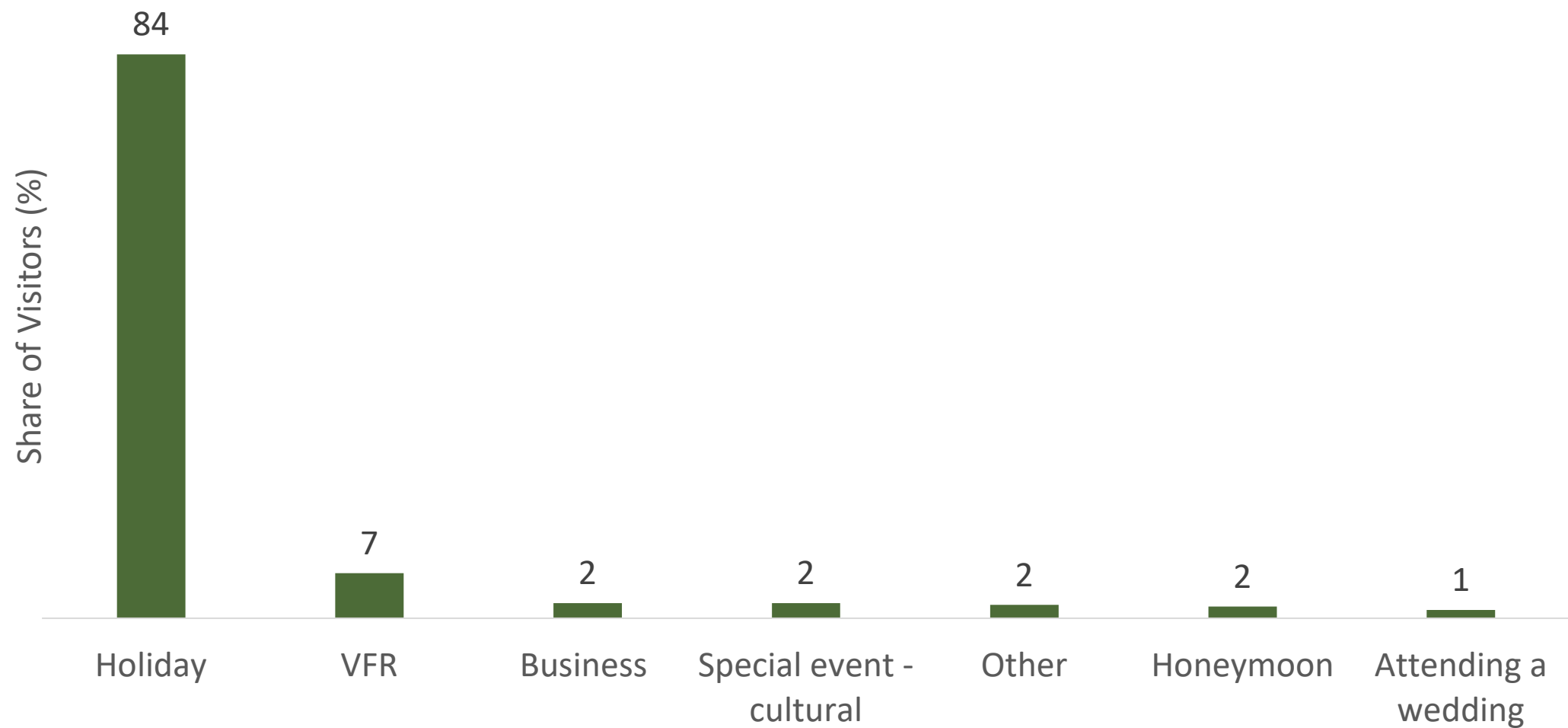


Visitor Spending
and Impact

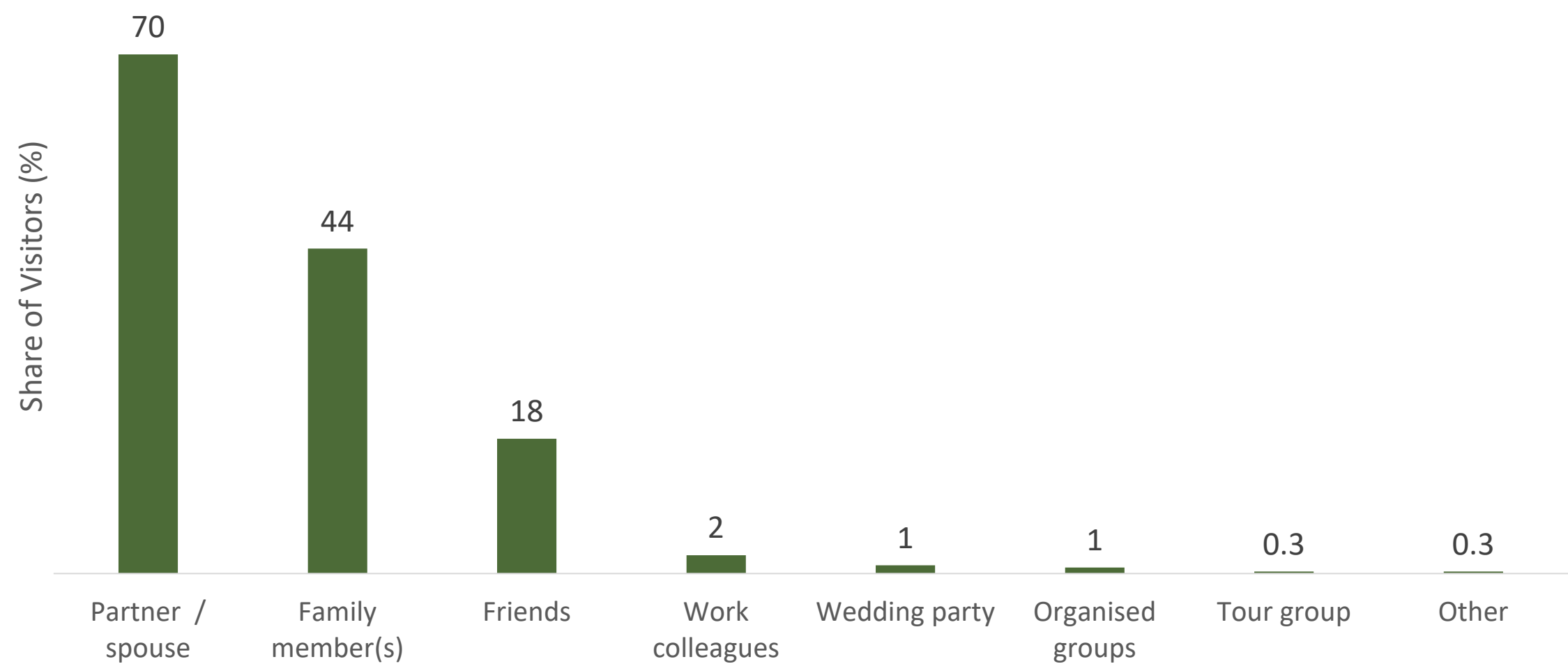


Visitor
Satisfaction

NZ diving visitors indicate Holiday as their main purpose of visit, followed by VFR.

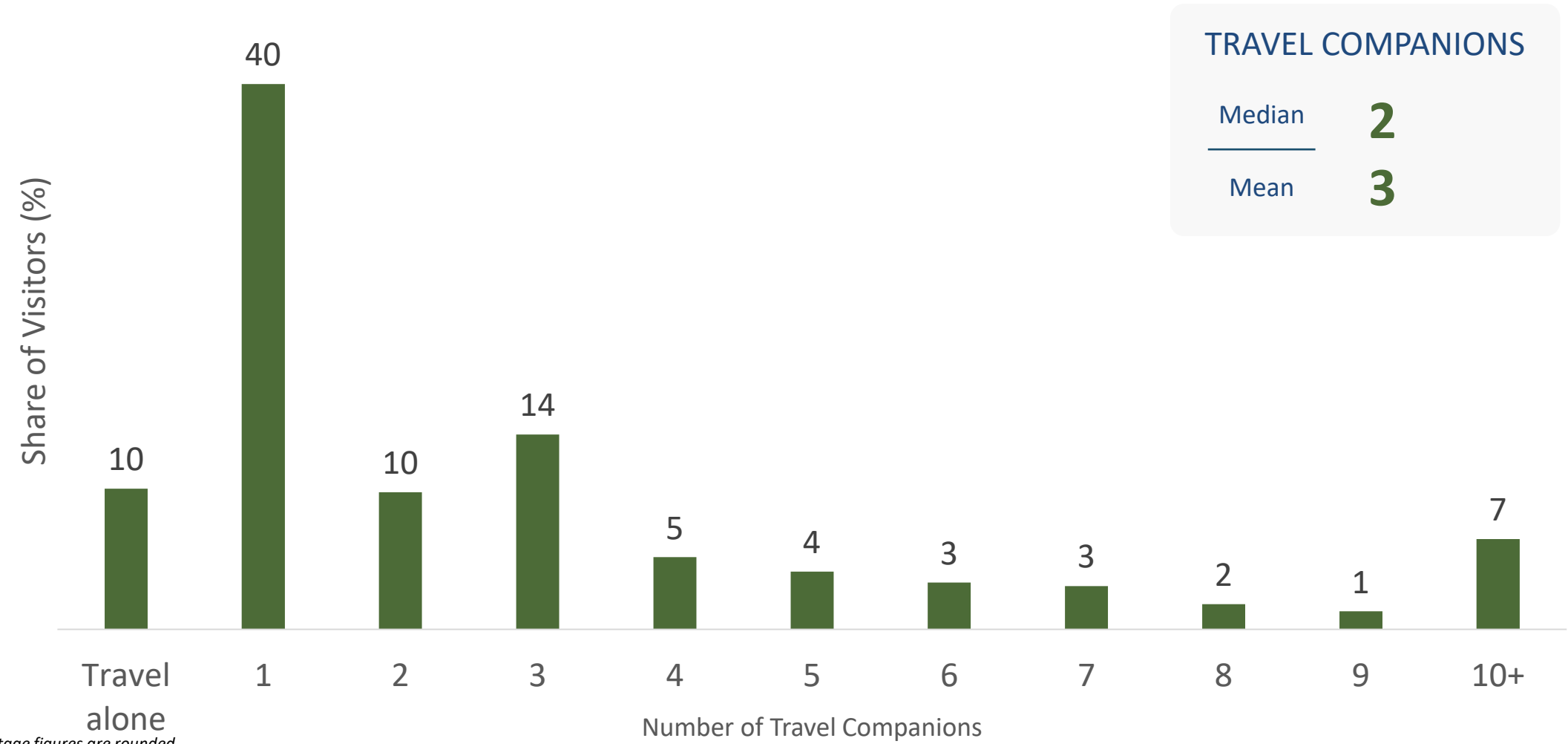


NZ diving visitors are very likely to travel with their partners, family members are also relatively important.

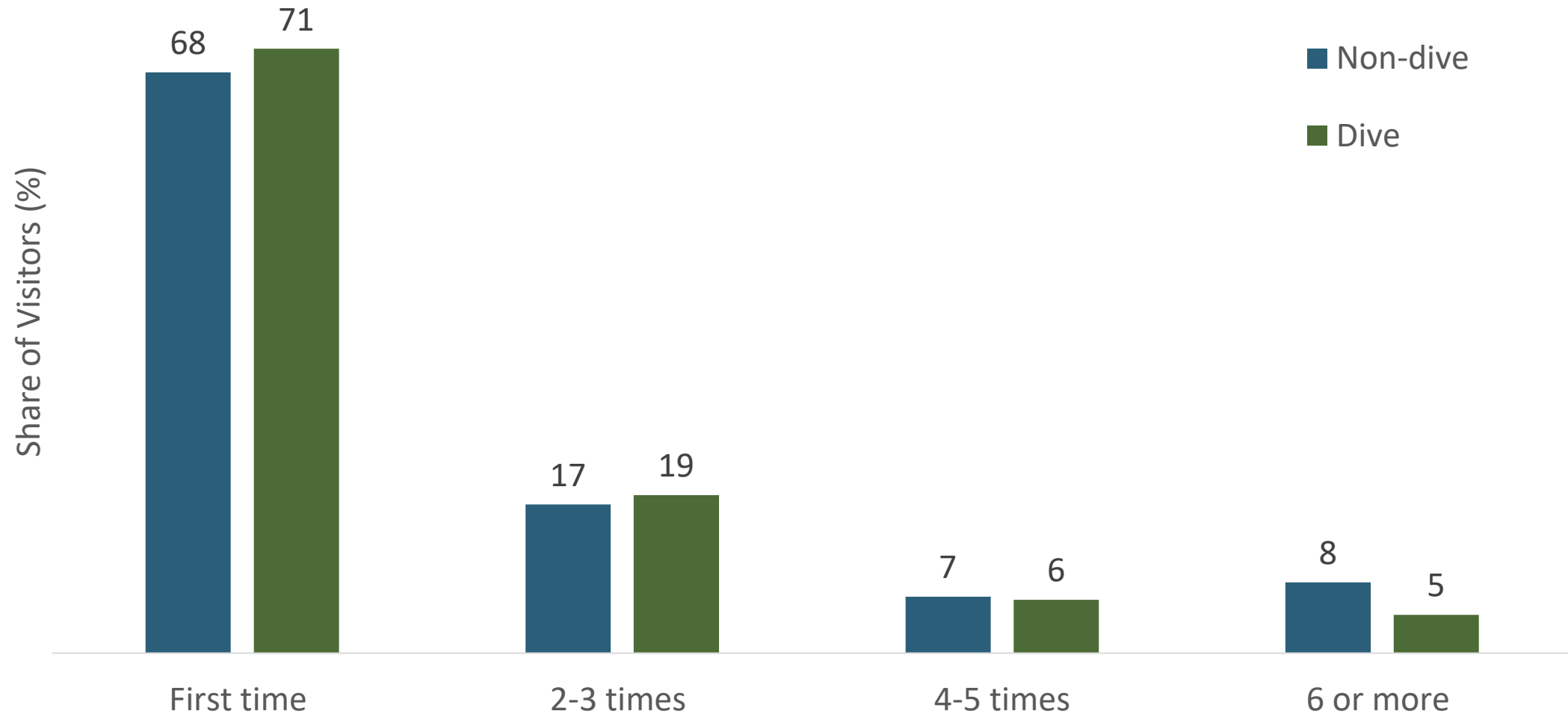


Note: Multiple responses, therefore total does not add up to 100%

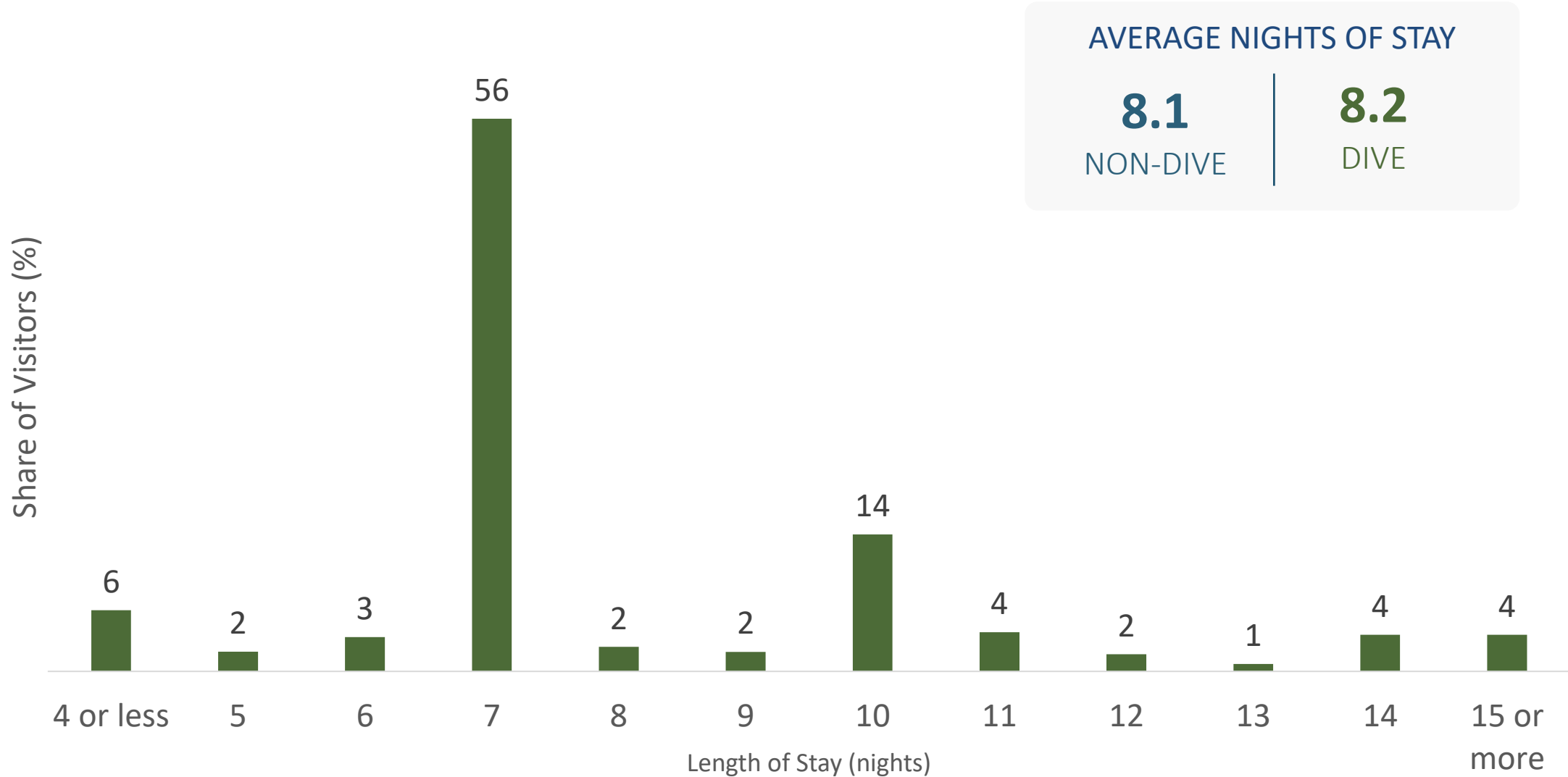
40% of NZ diving visitors travel with one other person. The median number of travel companions is 2.



NZ dive visitors are more likely to be visiting for the first time or to have visited once or twice before.

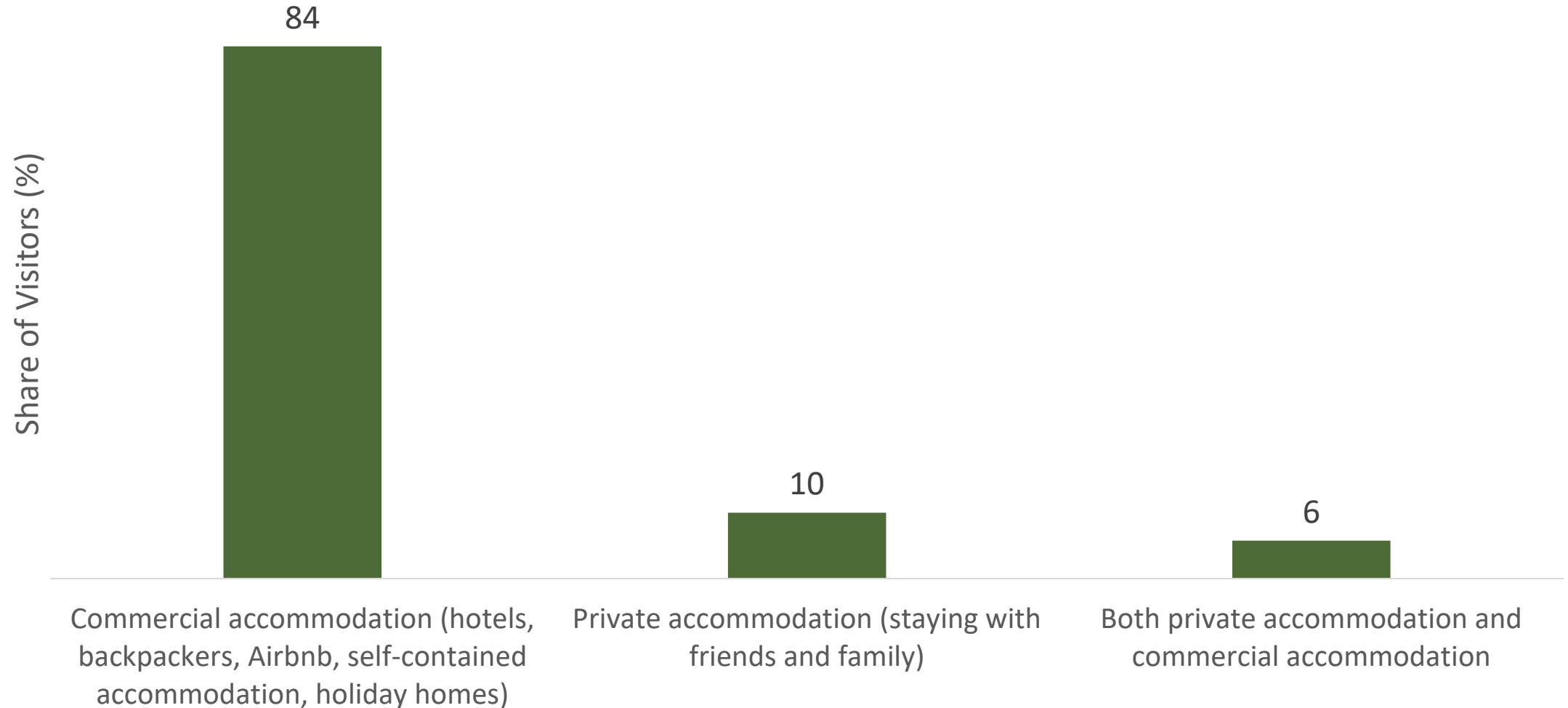


Length of stay is very similar for NZ dive and non-dive visitors.



Note: 30 and 30+ days as outliers were removed for length of stay analysis

The vast majority of NZ diving visitors use commercial accommodation during their trip to Niue.

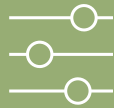


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Report Structure



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Profile



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& Preferences



Information &
Decision Making



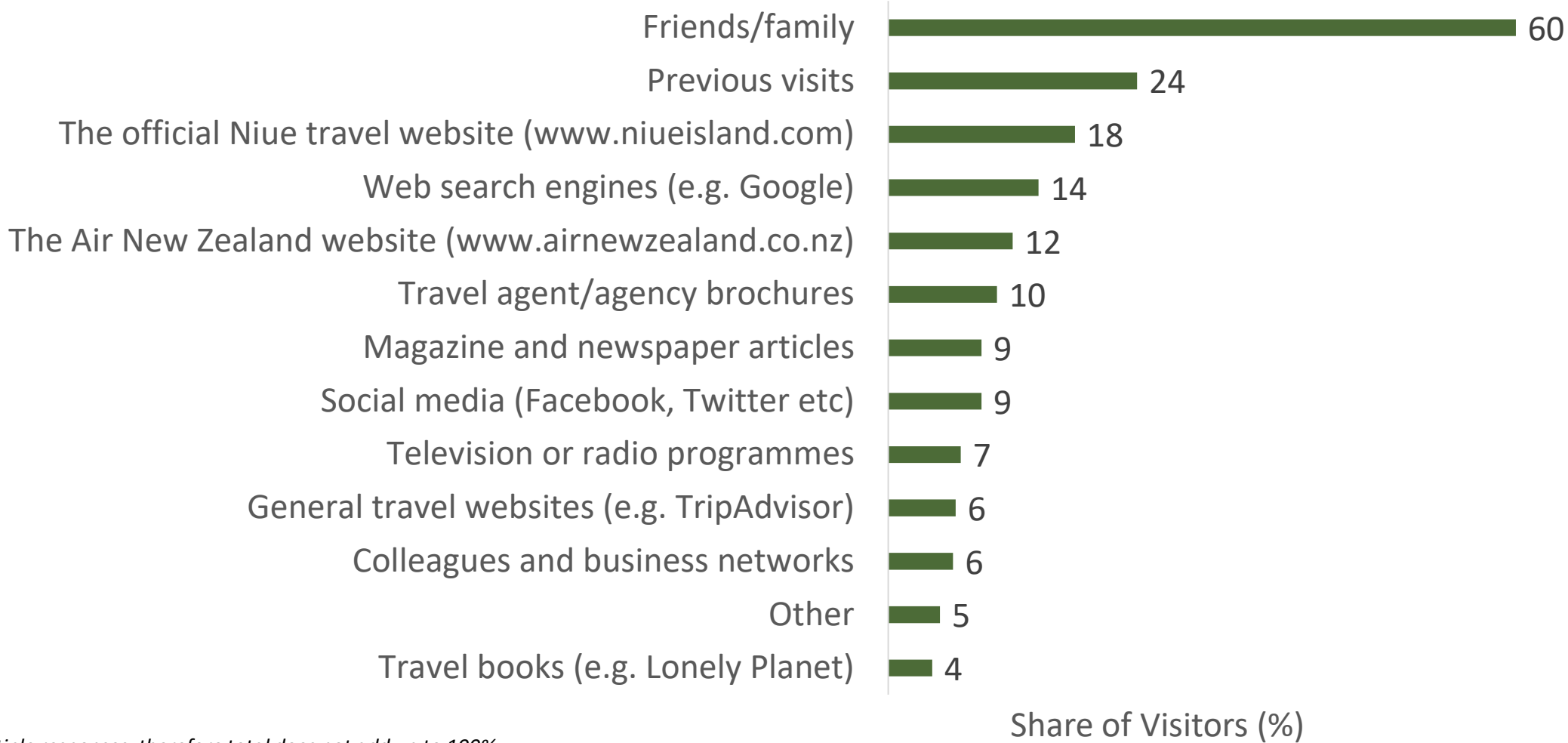
Visitor Spending
and Impact



Visitor
Satisfaction

NZ diving visitors rely heavily on friends/family for information of Niue. The official travel website of Niue is the most commonly used online channel.

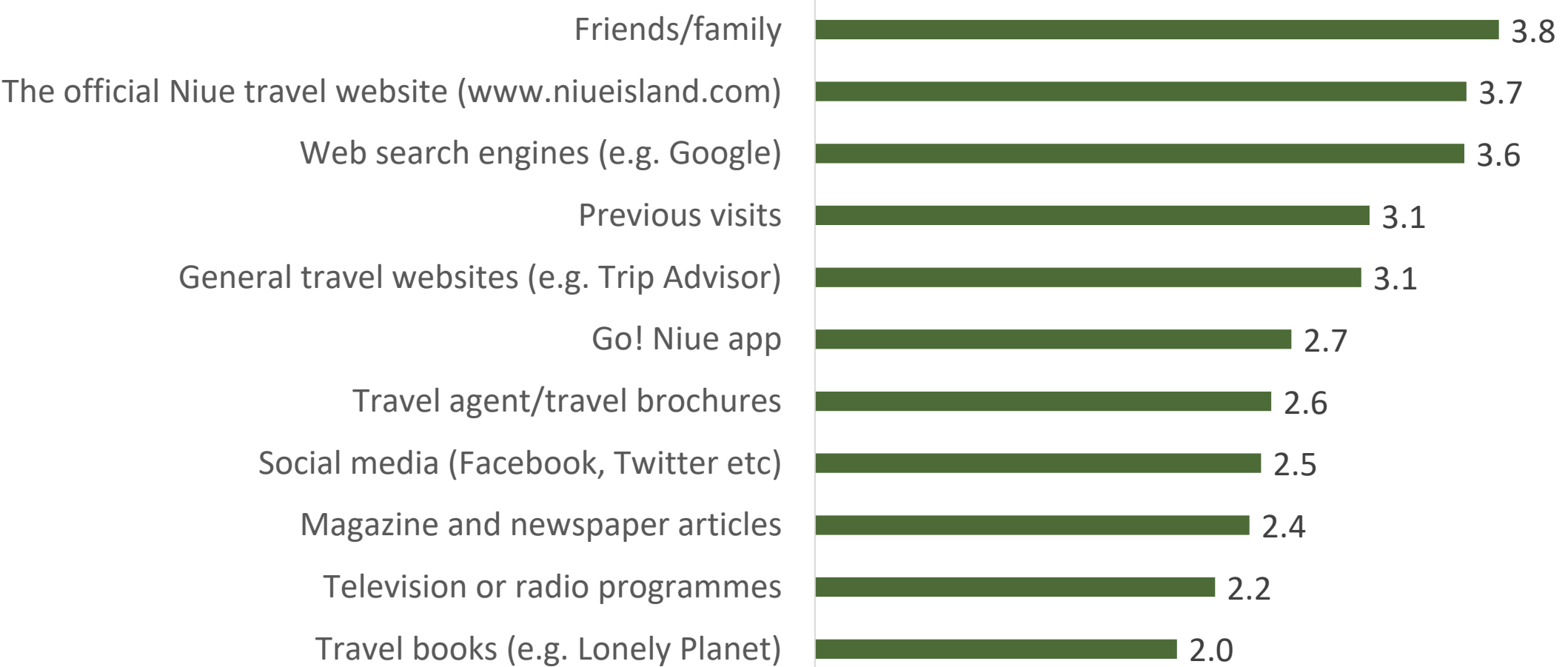
Q How did you find out about Niue as a destination?



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

Friends/family is the most important information source for NZ dive visitors to Niue. The Niue official website and general travel information sites/search engines e.g. Trip Advisor and Google are also important sources of information.

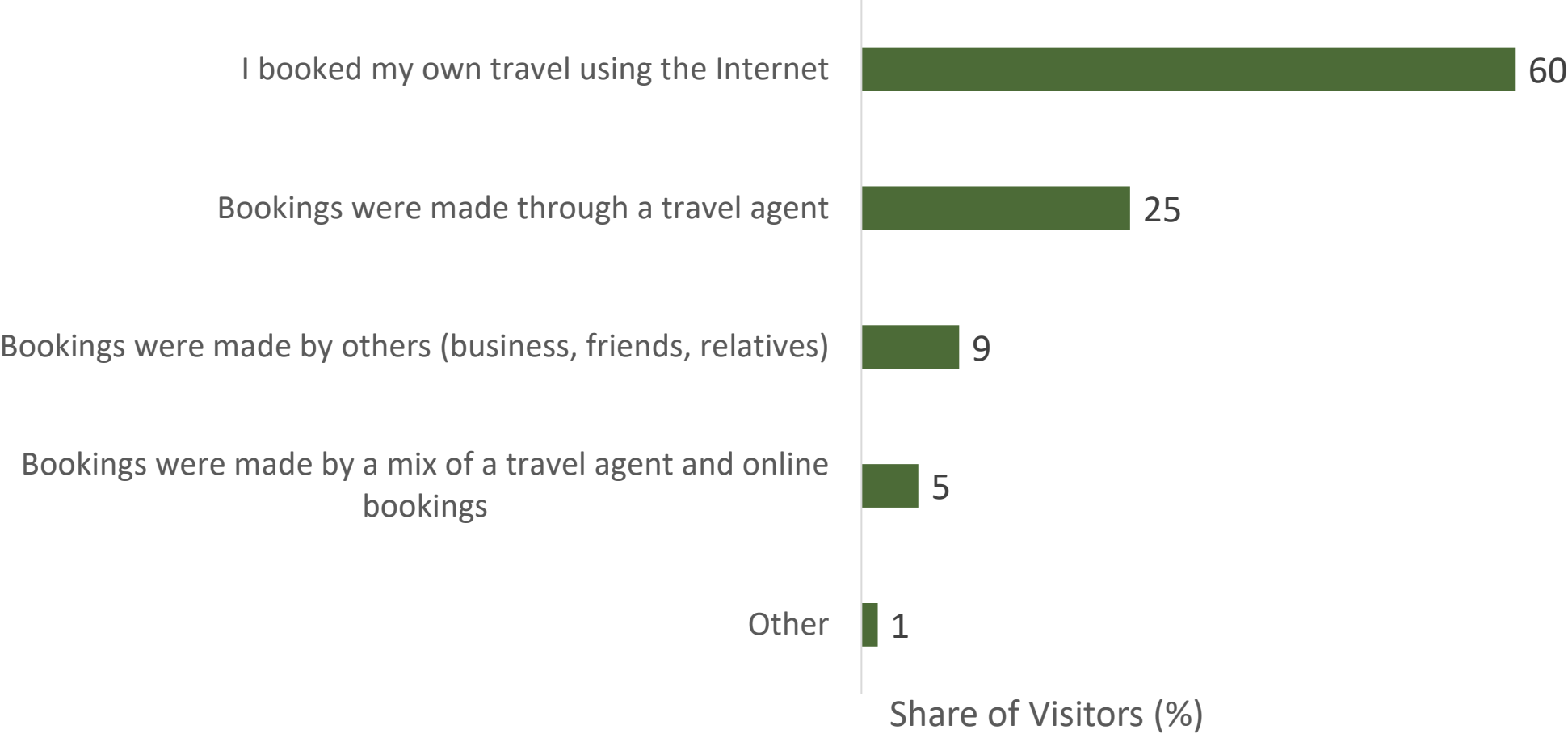
Q How important the following information sources were during your travel planning?



Mean : Not at all important (1) to Extremely Important

More than 60% of NZ diving visitors book their travel using the Internet.

Q How did you purchase your travel?



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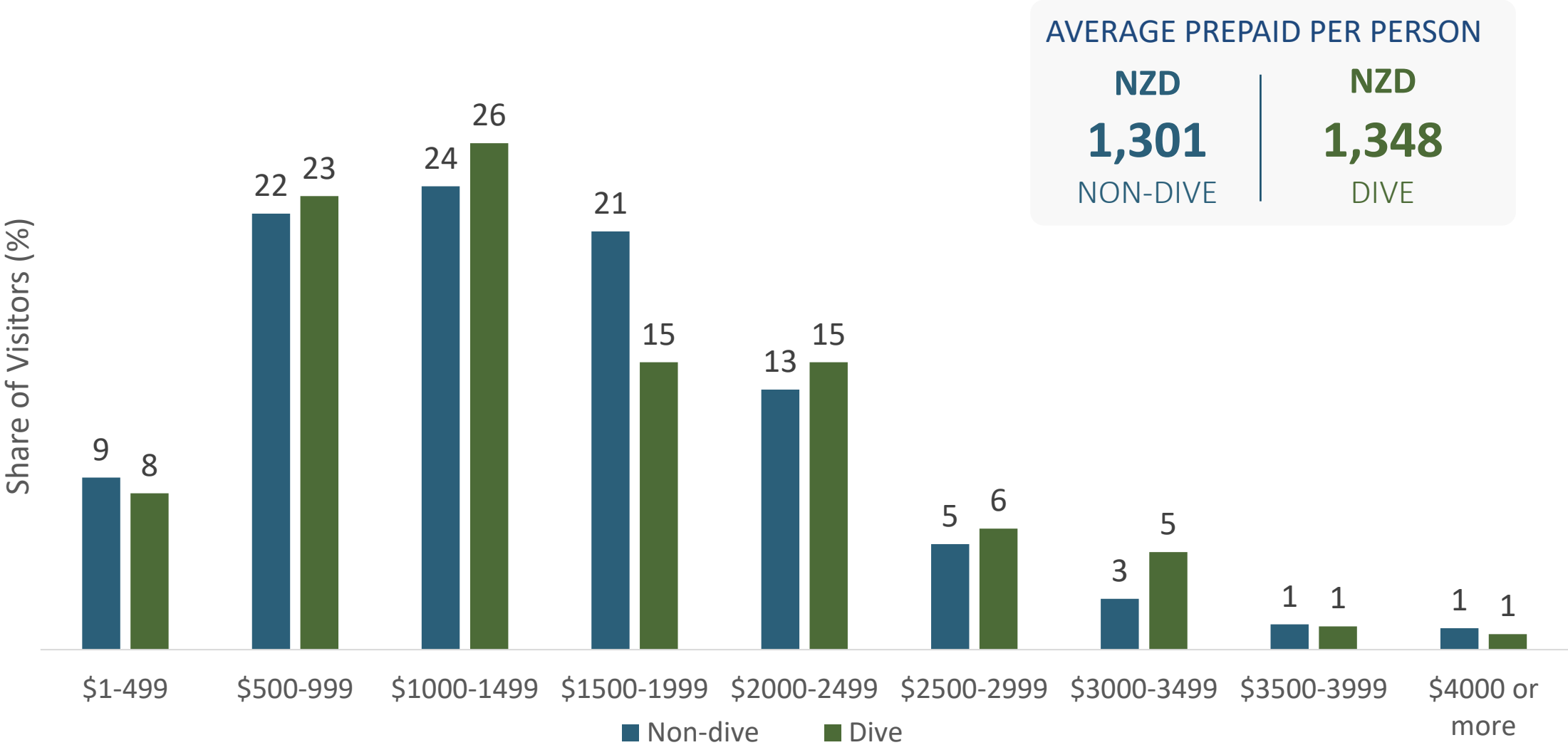


Visitor Spending
and Impact



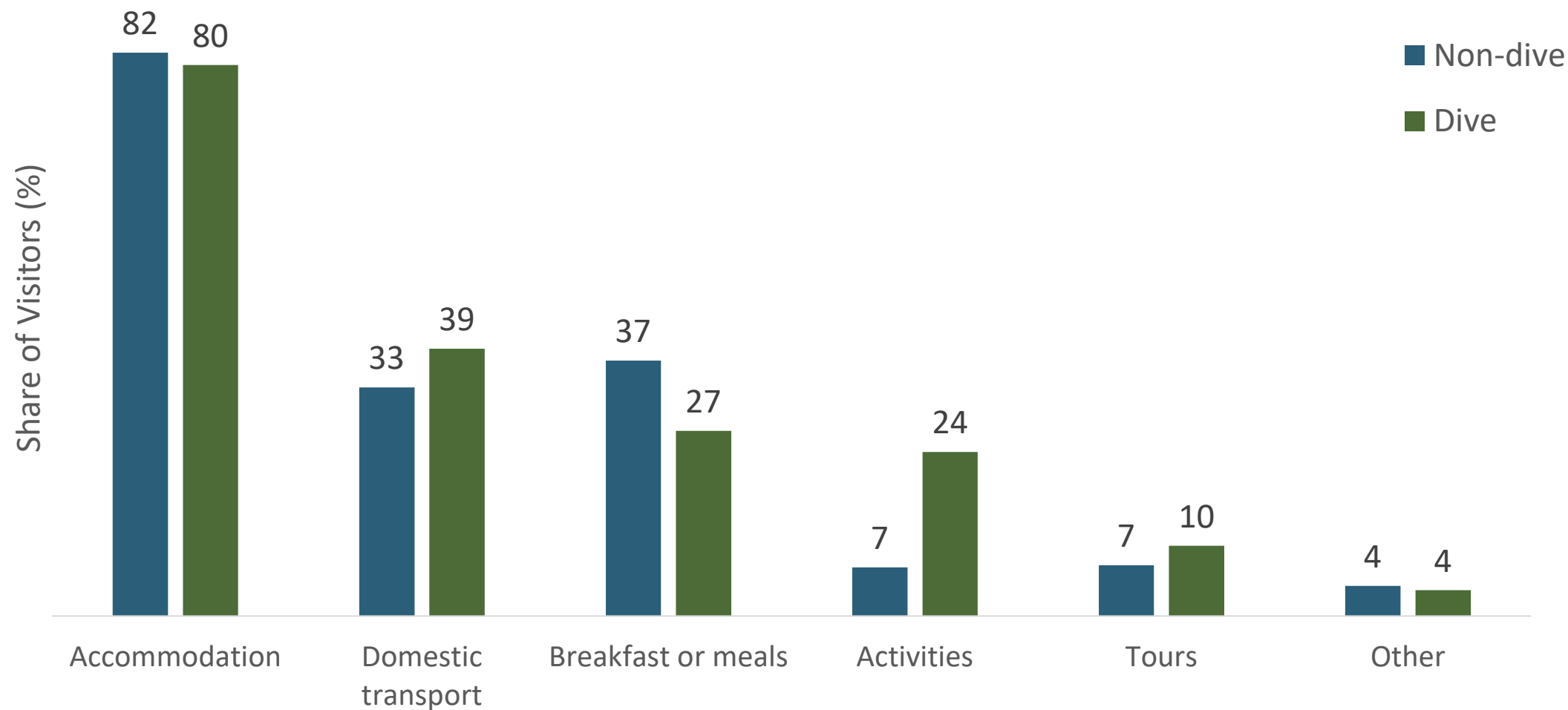
Visitor
Satisfaction

NZ diving visitors spend approximately 4% more prior to arrival than their non-dive counterparts.



Note: Percentage figures are rounded

Prepaid items: NZ diving visitors are likely to spend more on domestic transport and activities than non-divers.



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

In-country spend: NZ diving visitors spend more on activates, and accommodation than non-dive visitors. NZ diving visitors spend nearly 20% more per day while in Niue.

	NZ NON-DIVE		NZ DIVE	
	<u>NZ\$</u>	<u>% of sector</u>	<u>NZ\$</u>	<u>% of sector</u>
Accommodation	32	31	42 ▲	35
Restaurants, Cafes & Bars	26	25	26	21
Vehicle Rental	12	11	10	9
Petrol	5	5	4	4
Internet and telecommunication	2	2	1	1
Groceries	9	9	8	7
Shopping (e.g. souvenirs, clothes)	5	5	4	3
Activities (e.g. water sports, sightseeing)	7	7	21 ▲	17
Services (e.g., massages/hairstyling)	0.4	0.4	1	0.5
Local arts and crafts	2	2	1	1
Donations	2	2	1	1
Other	1	1	1	1
TOTAL	103	100	122	100

Economic Impact – Per Person and Total: NZ dive visitor impact per trip is NZD 193 more than non-dive visitors.

	NZ NON-DIVE	NZ DIVE
Average Spend Prior to arrival		
Per Person Per Trip	\$1,301	\$1,348 ▲ \$47
<i>Flowing into local economy rate – estimated 40%</i>		
Per Person Per Trip	\$520	\$539 ▲ \$19
Per Person per Day	\$64	\$65 ▲ \$1
Average Local Spend		
<i>Length of Study (nights)</i>	8.1 nights	8.2 nights
Per Person Per Trip	\$828	\$1,002 ▲ \$174
Per Person per Day	\$103	\$122 ▲ \$19
Total Economic Impact-Per Trip	\$1,349	\$1,541 ▲ \$193
Total Economic Impact-Per Day	\$167	\$187 ▲ \$20

Note: NZ dollars in the chart.

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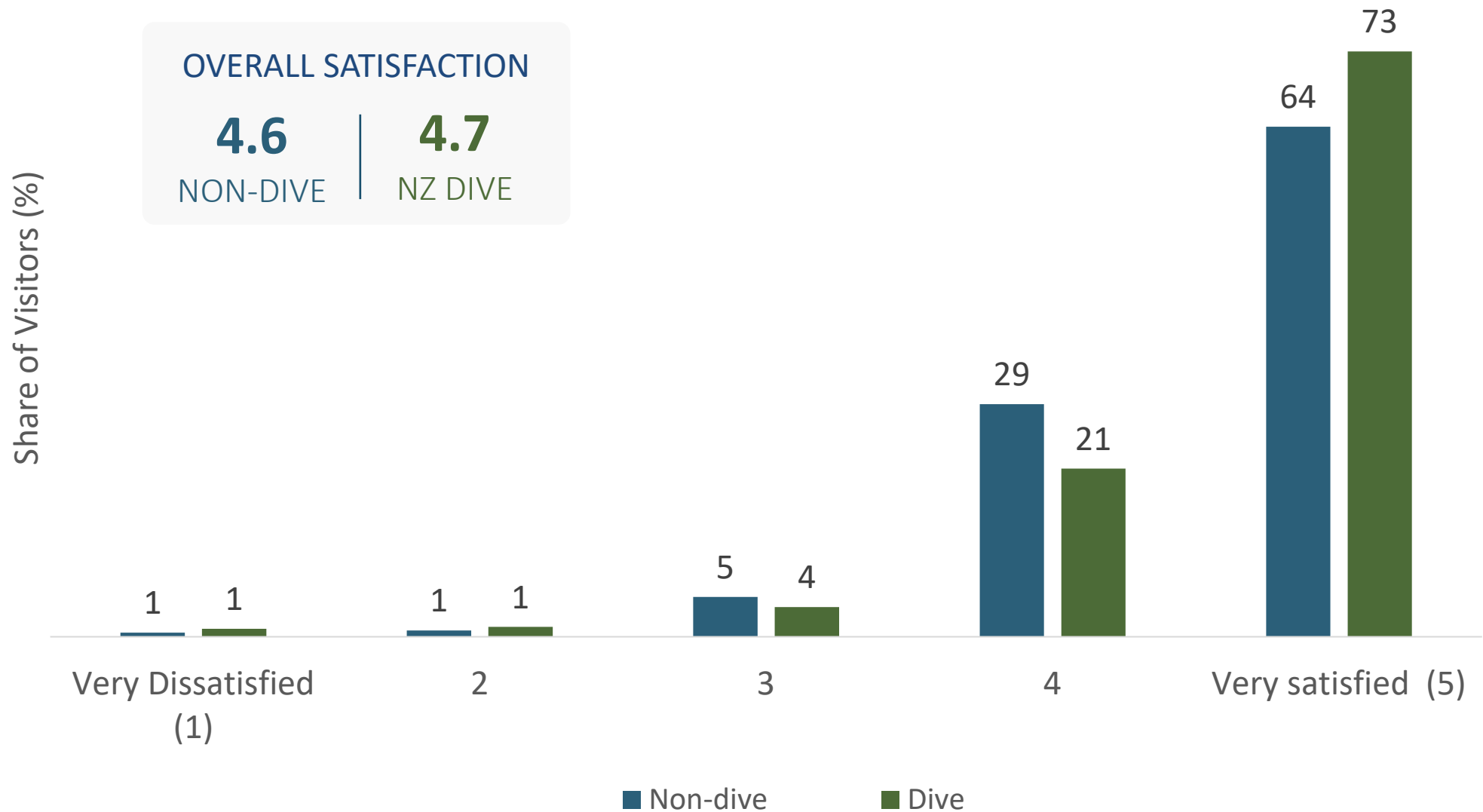


Visitor Spending
and Impact



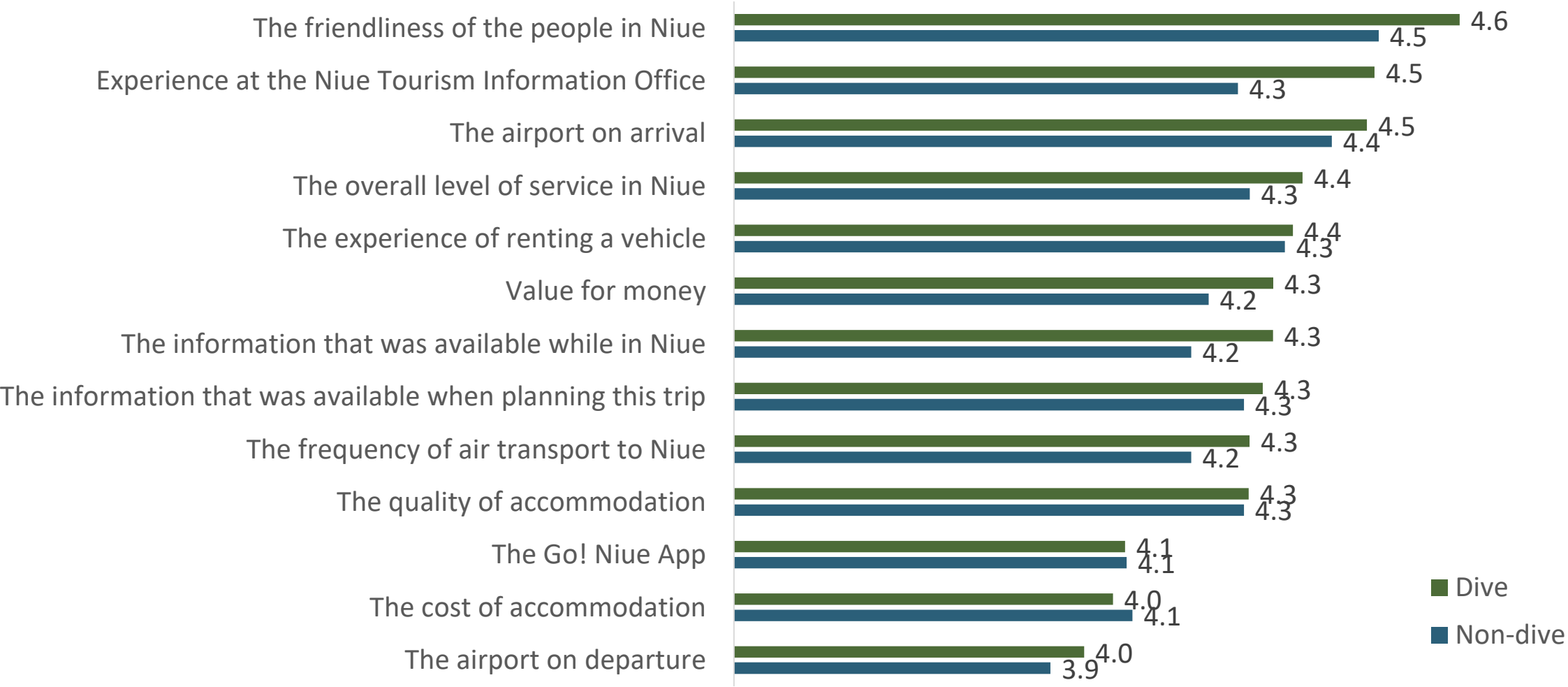
Visitor
Satisfaction

There are significantly more “very satisfied” visitors from the NZ dive market than non-dive visitors to Niue.



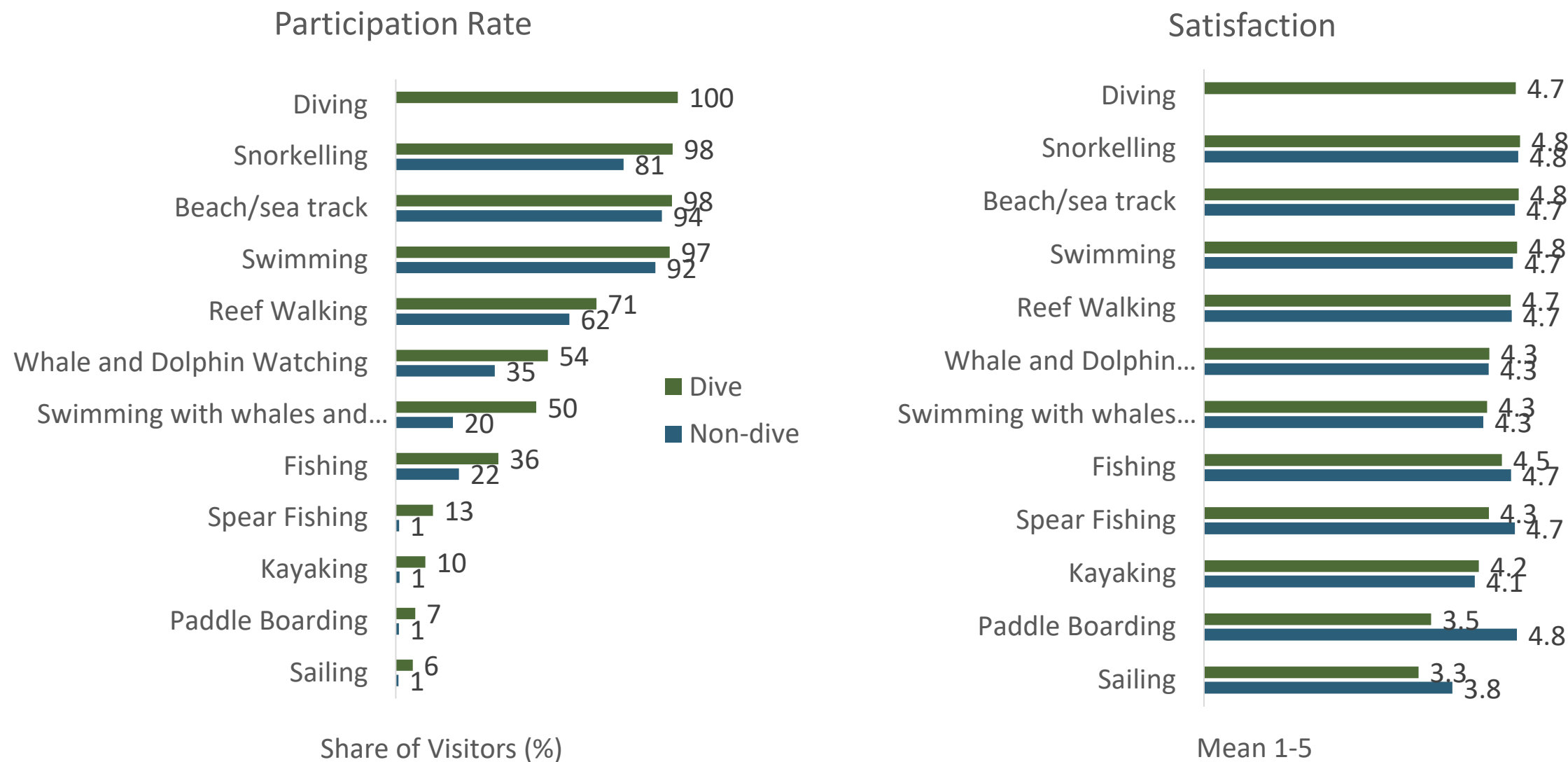
NZ diving visitors are generally more satisfied with key elements of their Niue travel experience than non-dive visitors.

Satisfaction with services and facilities in Niue



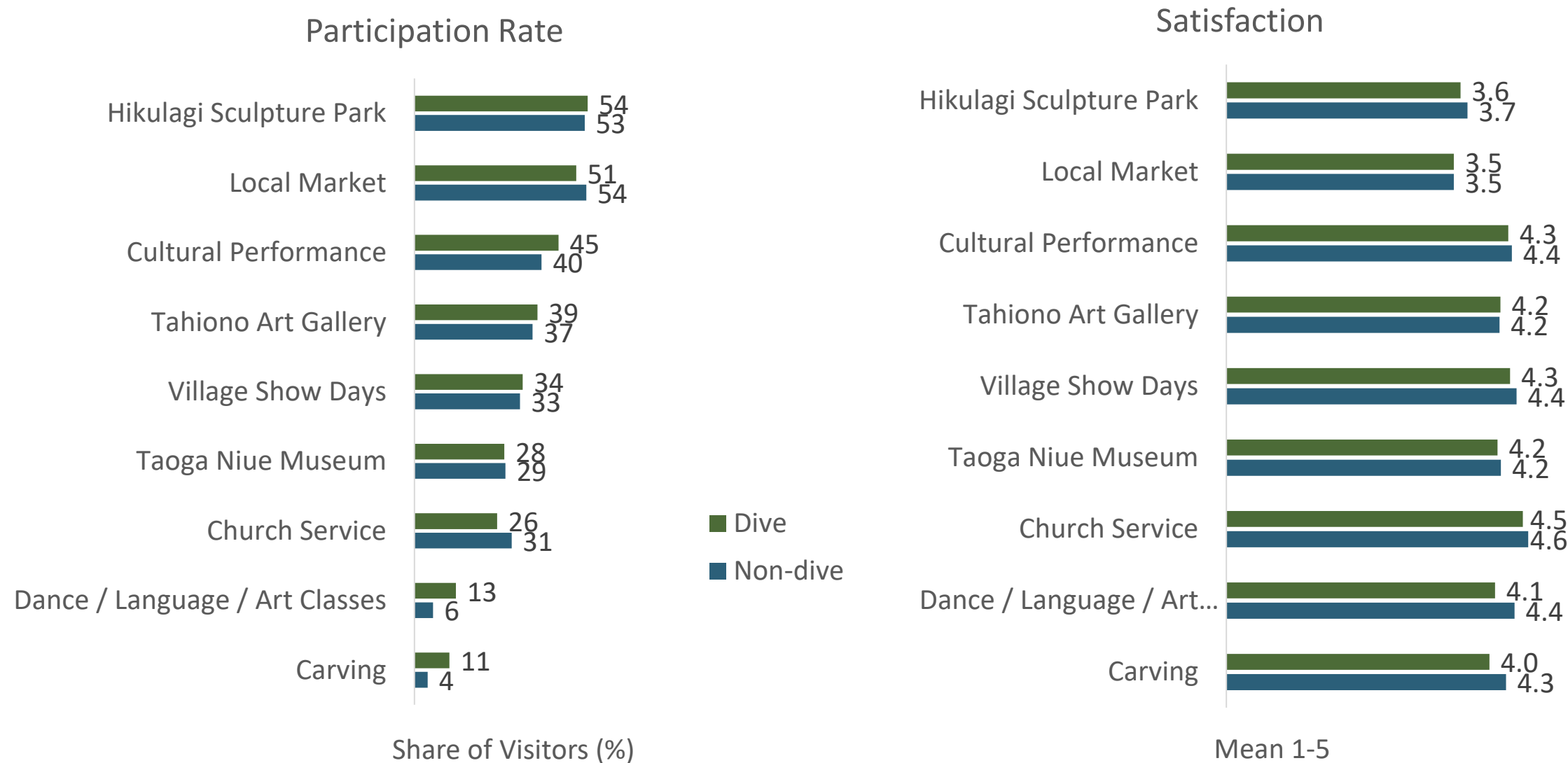
Mean: Very Dissatisfied (1) to Very Satisfied (5)

NZ diving visitors are more likely to participate in a range of water-based activities than non-dive visitors. Satisfaction level are similar for both groups.

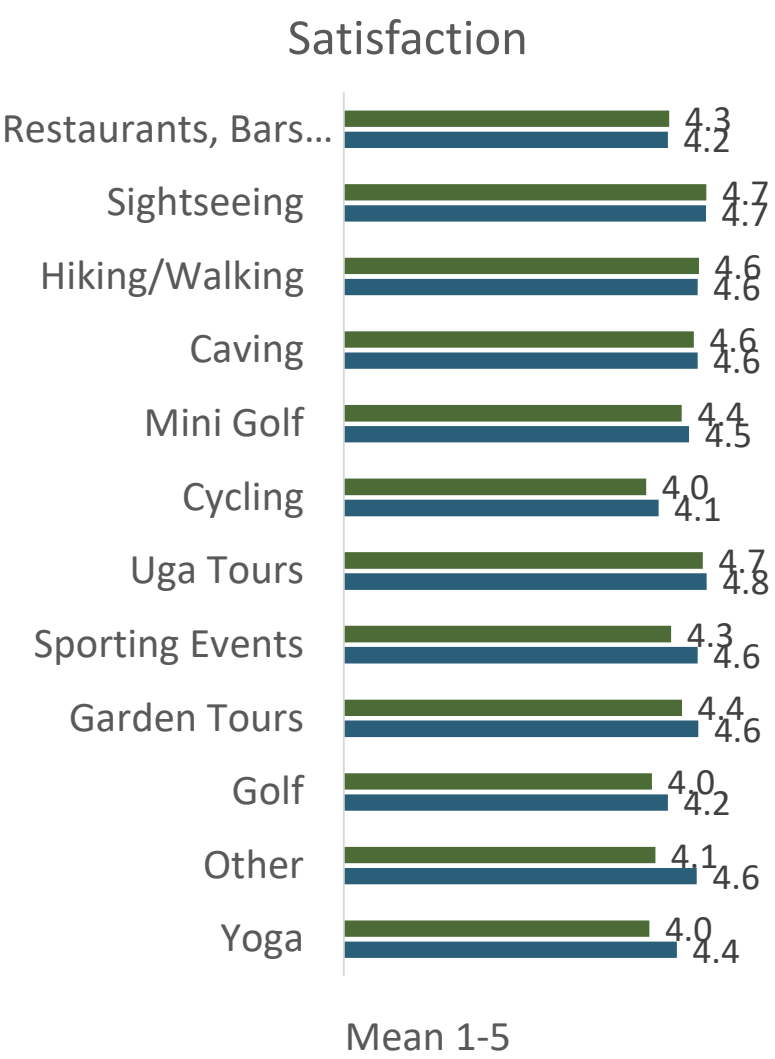
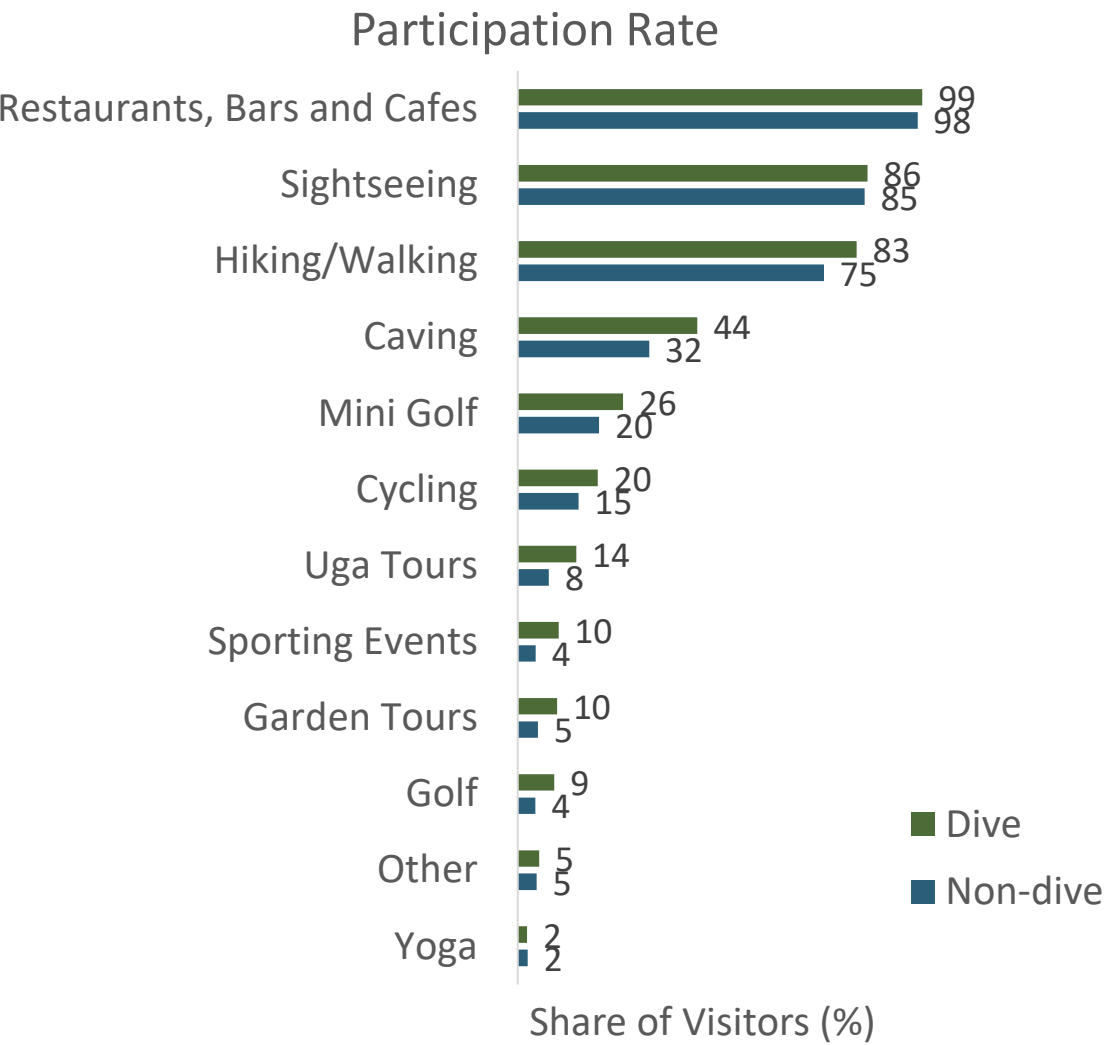


Note: * based on 10 participants

Participation rates in culture activities are relatively low among both dive and non-dive groups. Satisfaction rates are similar.

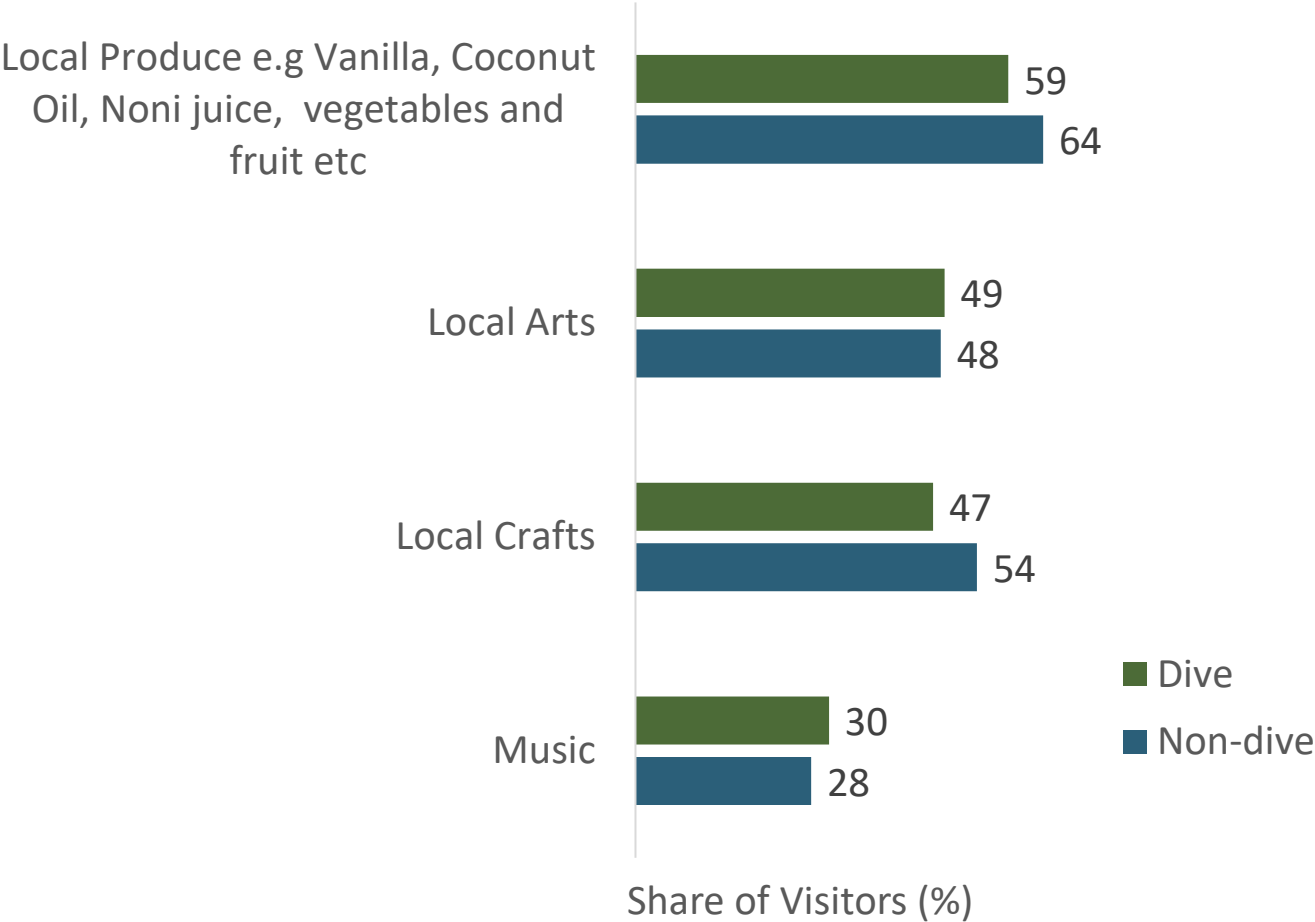


NZ dive visitors are more likely to participate in land-based activities than non-dive visitors, especially in hiking, and caving.

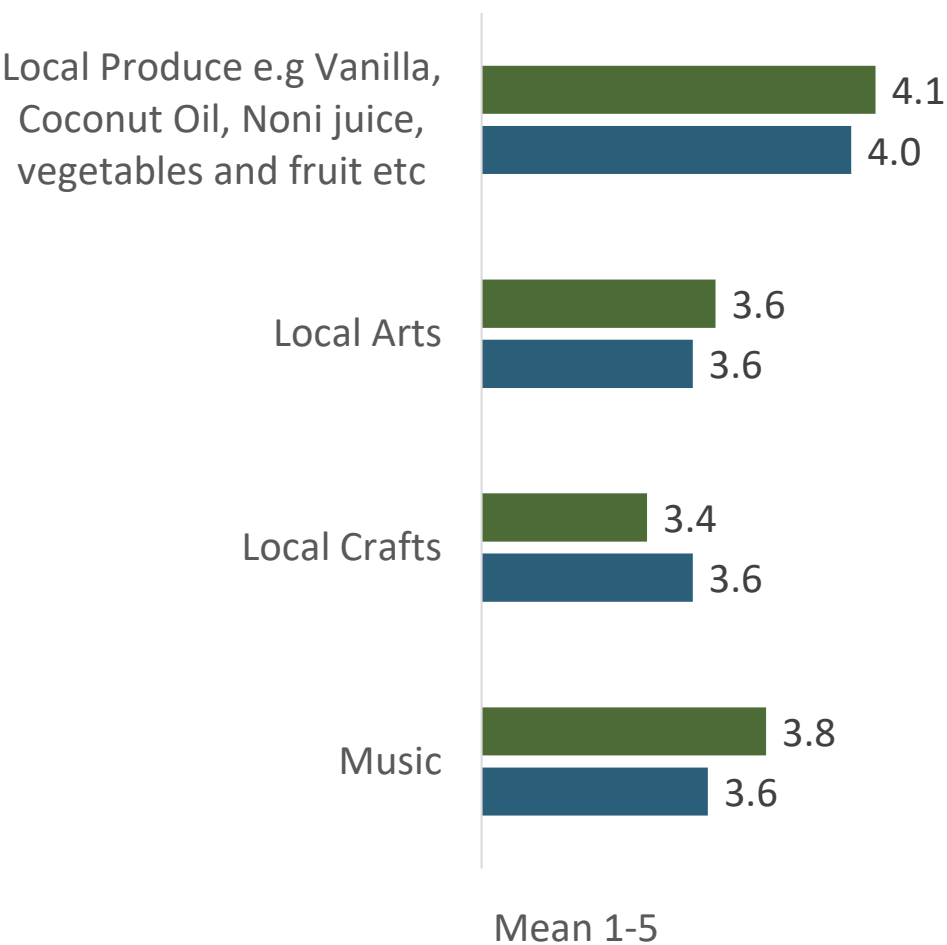


NZ diving visitors are less likely to participate in shopping than non-diving visitors in general. Satisfaction with shopping is low for both groups.

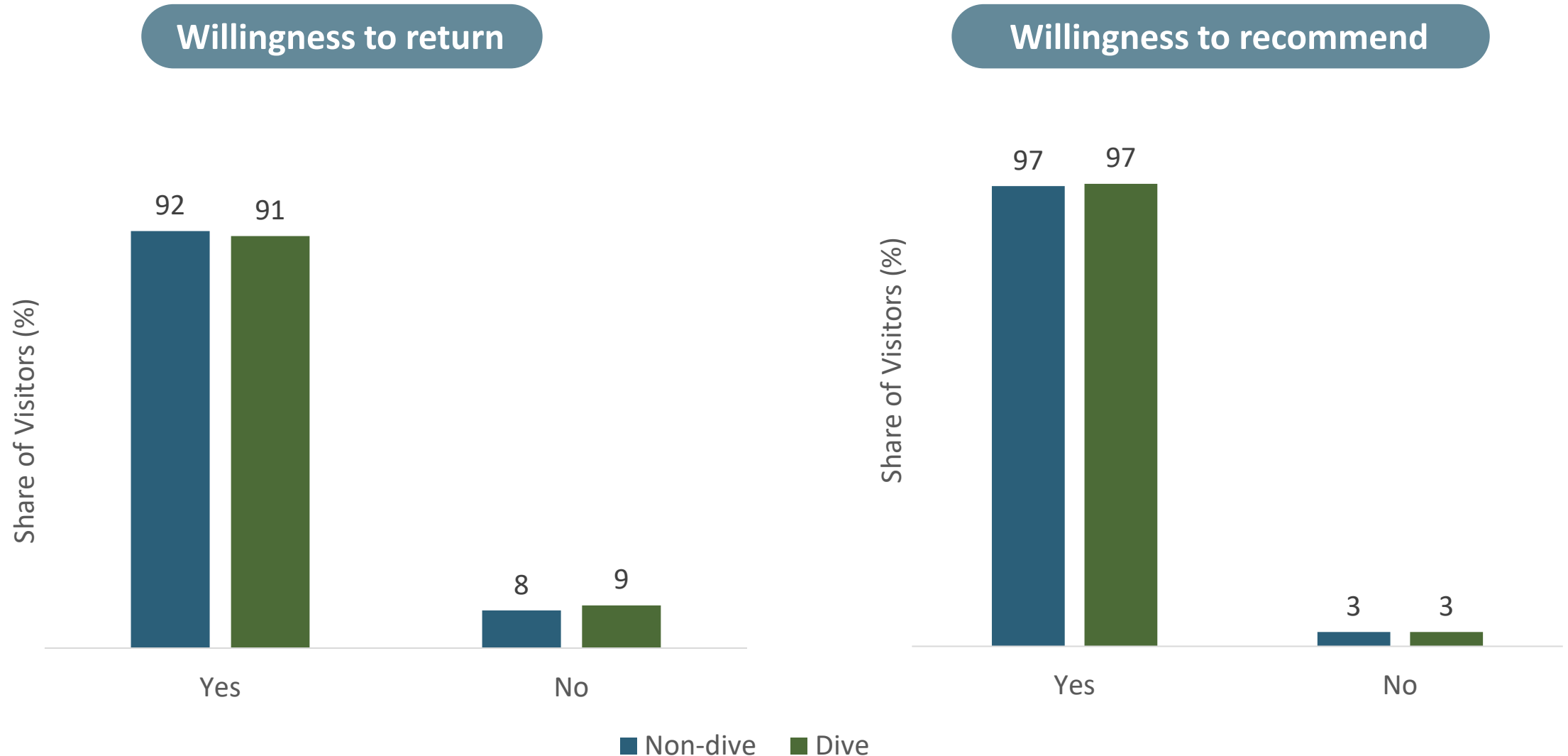
Participation Rate



Satisfaction



Both NZ diving visitors and non-dive visitors express a high willingness to return to Niue, and to recommend Niue to others.



Most Appealing Aspects-Indicative general quotes from NZ Divers



"Natural environment and tranquillity of the island - not an overly developed tourist place crammed with tourists. "

"The cleanliness of the whole entire Island. It's amazing."



"The sea tracks and limestone structures, the water and visibility and fish life. seeing whales from the shore and swimming with the dolphins. My husband heard whale song while he was diving and managed to record it for us and that was very special!"



"Love the people and the laid back attitude of the island - This is our third time back."



"Not over commercialised, relaxed and friendly."

"The beautiful weather!"



"Loved all the signage around the island. It made it easier to find things. Really like the cap on visitor numbers. It didn't feel over run by tourists. We absolutely loved the food and people running Wok on the Rock."



"The local food!"



"Free cocktail at resort. Solitude. Buccaneer Dive, friendly and helpful. View from our balcony at Matavai."

Most Appealing – indicative diving specific quotes



“That diving was spectacular.”

“Great diving in crystal clear water.”

“Scuba diving opportunities and the water clarity .”

“The diving/water visibility and marine life. Not busy/over polluted with rubbish and tourists.”

“70m visibility. Diving very safe and professional. Caves are awesome. The walkways in great repair and nice toilets.”

“The water was the best diving I have ever done. So beautifully clear.”

“Great sea conditions, accessibility over the reef for diving.”

“Sea tracks & exciting places to explore, incredible water clarity & diving/freediving was epic!”

“The sea conditions for snorkelling and diving. Access around the island is good.”

“Diving swimming with dolphins and snorkelling in the pools and chasms, proximity to dive shop from hotel.”

Least Appealing Aspects-Indicative general quotes from Divers



“Public toilets, pot holes. There isn't a Taxi service ”



“No power, limited internet, food options were average or food had run out, roads need work.”



“Airport waiting areas. Internet/phone service is poor.”



“Dogs chasing car and cyclists. Potholes. Early morning ROOSTER calls.”



“Shops weren't open much. Lots of itchy bites from bugs. Market was a disappointment: I would have loved to have bought fresh fruit and food but there was hardly any stands ...”

“No shopping to talk of. Like for example little things like selling water shoes etc would be good.”



“The prices for food but that is something you just have to except due to shipping. Prices don't match service level.”



“Service at some restaurants was not so good - our orders were frequently forgotten about.”

“Information centre hours. It appeared when the Manager wasn't there neither were the staff.”



“Rubbish- lack of recycling. Resort had lots of days Nile serve packaging.”

Least Appealing-indicative diving specific quotes



2%

Share of
comments

“The scuba diving wasn’t great we will be back to Niue but not for the diving.”

“I loved everything although being the offseason and due to recent weather, we were often unable to go diving and many sea tracks and snorkelling spots were closed...”

“We love Niue and visiting, however we usually come earlier in the year and found the heat and humidity to be tiring - also as coming into cyclone season found that the diving stopped early and the weather (which you can't arrange!) did have an impact on what we did this time.”

“The weather caused nearly all my diving and whale watching trips to be cancelled. While I appreciate nobody can control the weather, I was left a little disappointed that there were no indoor activities around and was basically told by resort staff to “just stay inside your room and read a book”. That is not why I go on holidays!

“Our dive people were confronted by a local woman who was very hostile and not keen to allow the boat to be launched. This was the only available ramp and the inconvenience to the fishermen was very small equating to minutes only. We had to miss 2 dives because of the locals attitude to our use of the launching ramp.”

“Unable to get out diving due to insufficient boat launching facilities. Our main purpose to visit was to dive. We were only able to achieve 50% of our dives.”

“Having a place to launch the boat when there was swell and the container ship arrived as we couldn't dive for 6 days.”

“My sons dive boots were stolen from the steps of the backpackers overnight.”

Improvement Suggestion-indicative general quotes from Divers



“Rental vehicles condition and road conditions and airport facilities.”



“Would love more fresh local food in restaurants and Matavai, lots of it is imported from NZ ...”



“The attraction of Niue was the opportunities to more easily privately snorkel outside the inner reef. This was possible however guidance on best times to do this and where was sparse.”



“Shops being open more often/ later.”



“Less time waiting in the airport; more updated information for tourists, update brochures and websites .”



“Swimming restrictions should be made more clear prior to booking the flights.”



“Better Wi-Fi within smaller accommodation to make maps, shop hours, etc more accessible.”



“Remembering to bring more DEET (ran out), longer open hours or online ordering system (the bakeries had such nice food!), allowed some provision for swimming while the goat fish were in...”



“The amount of stray dogs and cats it's so sad to see the negligence of animals.”

Improvement Suggestion-indicative diving specific quotes



“An artificial reef/wrecks to dive.’

“My sons dive boots were stolen from the steps of the backpackers overnight.”

“Would like to be able to rent gear and dive independently.”

“Being able to go diving, more sea tracks and snorkel spots available.”

An aerial photograph of a stunning natural swimming spot. The water is a vibrant turquoise color, surrounded by dark, jagged rock formations and lush green vegetation. Several people are seen swimming in the pool, and a group is walking along a wooden boardwalk that winds through the rocks. The scene is bright and sunny, with shadows cast by the rocks and trees.

Thank you

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Appendix: Diving specific quotes-Most Appealing

- snorkelling and diving
- Great sea conditions, accessibility over the reef for diving
- Sea tracks & exciting places to explore, incredible water clarity & diving/freediving was epic! Friendly locals, excellent trip with buccaneers and with BJ!
- The beautiful diving
- Water quality and fish life for snorkelling and diving
- Diving, whale swimming, crystal clear waters, good food
- nice people, great reef and diving
- Beautiful Pacific island. I love all the sea tracks. My snorkeling 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.
- The marine life in the ocean, the cleanliness of the island and the staff at Buccaneer Diving. Great service.
- Whale diving
- The people and the diving
- Clarity and warmth of the water for snorkeling and diving.
- The water visibility and free diving
- clarity of water for scuba diving and marine life
- Diving
- Snorkelling and free diving opportunities.
- Diving with Rami
- Diving swimming with dolphins and snorkelling in the pools and chasms, proximity to dive shop from hotel
- Scuba Diving
- That diving was spectacular

Appendix: Diving specific quotes-Most Appealing

- The diving was incredible! Visibility was amazing!
- The cave tours and diving, cleanliness of the environment, the friendliness of the locals, the beauty of the environment. Niue Orientation Tour Guide was excellent.
- Scuba diving opportunities and the water clarity
- clear water for diving, friendly and helpful people, access to range of food for self catering, the weather
- Diving was amazing
- The people were so nice and welcoming and helpful. The diving and snorkelling was amazing.
- Diving and people
- free diving was great, local people at Hlo Cafe were awesome..
- The snorkelling and diving was absolutely fantastic. Enjoyed exploring around the island and all the walks/sea tracks.
- The amazing diving and snorkeling, the natural beauty of the place, the friendly helpful people.
- The scenery! Beautiful walks which lead to such diverse and beautiful sights. Also the scuba diving was fantastic! It was great to see the reef looking so healthy, and clean.
- The clarity of the water, fish life snorkelling, diving and fishing was great
- The water was the best diving I have ever done. So beautifully clear.
- Diving, water clarity and visibility
- Snorkelling diving and swimming with the dolphins plus the island is very pretty and no rubbish or graffiti. People also very friendly and welcoming.
- Snorkeling and diving. Sea is so clear. Fantastic
- The diving and ocean life/topography. Loved the water clarity. The friendly people and the dogs
- The SCUBA diving and sea tracks/snorkling.
- The walks to explore caverns. chasms and swimming spots were awesome. Also how clean the island is - amazing! Diving and fishing were both excellent too.
- Great food and scuba diving.

Appendix: Diving specific quotes-Most Appealing

- The ocean! The fish and the diving and swimming that let me see and interact with the fish.
- Snorkelling and diving
- The people are amazing and the whole place just has an incredible feeling that makes you more relaxed than you could ever think possible. All the diving, snorkelling and swimming with dolphins was unbelievable as well.
- The underwater scenes when Diving
- quiet, not overly touristy, amazing diving/snorkelling
- The diving
- The clarity of the water, the beautiful diving, quiet place and friendly people
- 70m visibility. Buccaneer Diving very very safe and professional Caves are awesome. The walkways in great repair and nice toilets
- quiet. good diving. relaxed and friendly people. beautiful landscapes. Impressed how tidy, clean and well maintained.
- Natural wonders, amazing swimming spots, great diving, lovely people
- the diving
- The diving
- The warmth and clarity of the water. Sea life. Free cocktail at resort. Solitude. People very friendly. Buccaneer Dive, friendly and helpful. View from our balcony at Matavai.
- The sea conditions for snorkelling and diving. Access around the island is good.
- Clear water for diving
- Great diving in crystal clear water.
- weather was nice , clear water for diving, NZ dollar, nice resort, friendly locals, nice cafes , golf course was great
- diving snorkelling and swimming with the whales
- Snorkelling, diving, whalewatching. Water visibility in the ocean.
- Diving - it was beautiful and I'm amazed there weren't more people!

Appendix: Diving specific quotes-Most Appealing

- The best snorkeling and diving I've ever experience. I also loved that there was no mobile phone coverage and limited internet. It made for a very relaxing holiday.
- The diving was amazing and the people we very friendly
- Amazing amount of reefs that are so accessible to dive and snorkel
- snorkelling/diving
- The sea tracks and limestone structures, the water and visibility and fish life. seeing whales from the shore and swimming with the dolphins. My husband heard whale song while he was diving and managed to record it for us and that was very special!
- The diving!
- Diving
- Beautiful island, not many tourists, no rubbish anywhere and diving/snorkeling was amazing
- The unusual landscape and inexpensive dive course
- The reefs on snorkeling and diving
- The diving was incredible.
- Blue water, spear fishing & diving
- Ocean- reefs, sea life, diving, snorkelling
- Beautiful island, amazing snorkelling and diving
- beautiful ocean with amazing visibility for snorkelling and diving. Incredible sea tracks to remote locations
- How quiet the place and clean Diving was great
- The diving and snorkeling
- Diving & walking sea tracks
- The diving/water visibility and marine life. Not busy/over polluted with rubbish and tourists.
- The best snorkeling and diving I've ever experience. I also loved that there was no mobile phone coverage and limited internet. It made for a very relaxing holiday.