

VANUATU INTERNATIONAL VISITOR SURVEY

Review of Frequent Visitor Characteristics

January 2015 – March 2020

AUT



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
MANATŪ AORERE



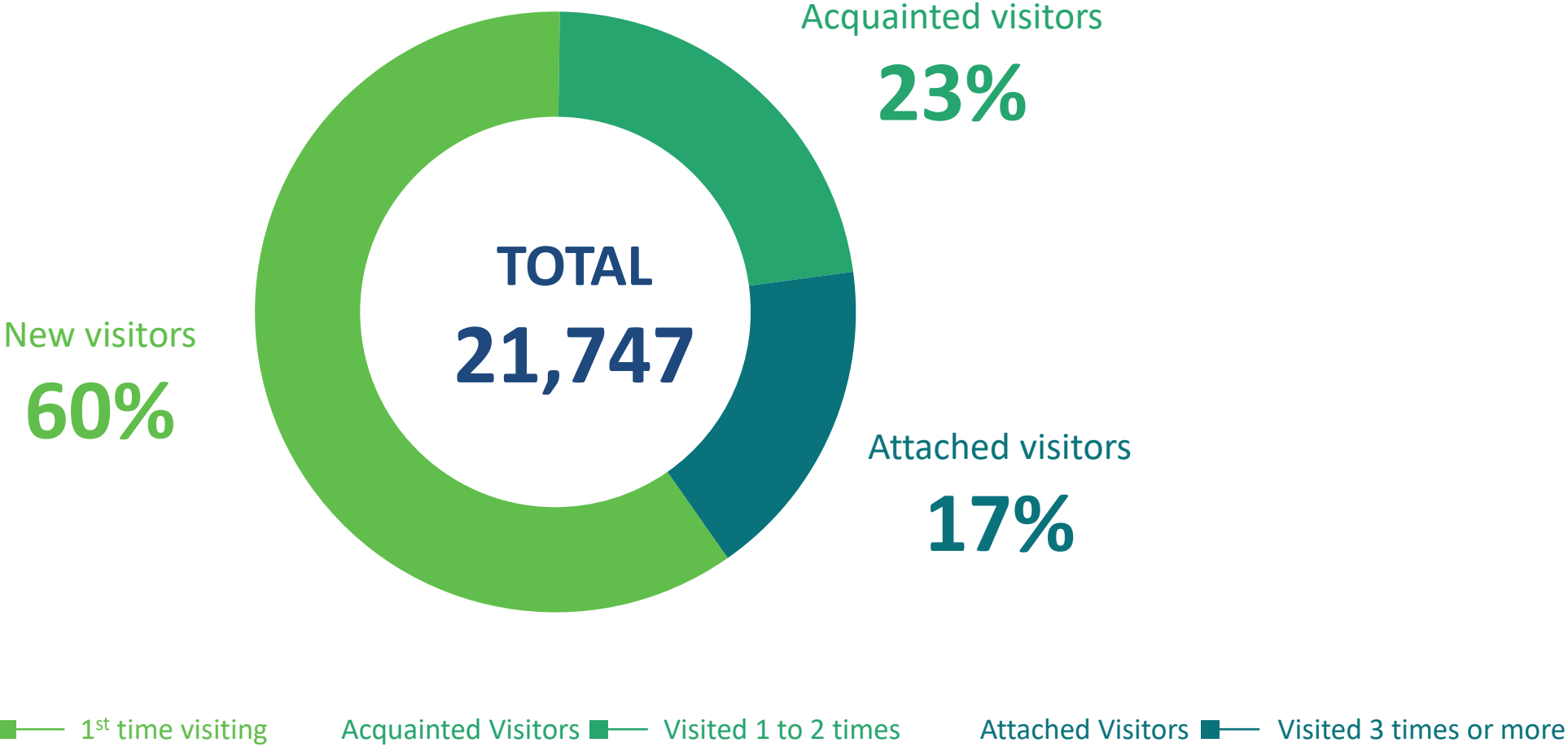
Background

- The 2015-2020 IVS date set is analysed to help us understand the profile of the repeat visitor.
- This report focuses specifically on the 'attached' visitor – those who have visited three times or more prior to their most recent visit.
- We focus on the attached visitor because there is a strong chance this group will be one of the first to return to Vanuatu as the COVID pandemic is controlled and international borders open again.

Report Structure

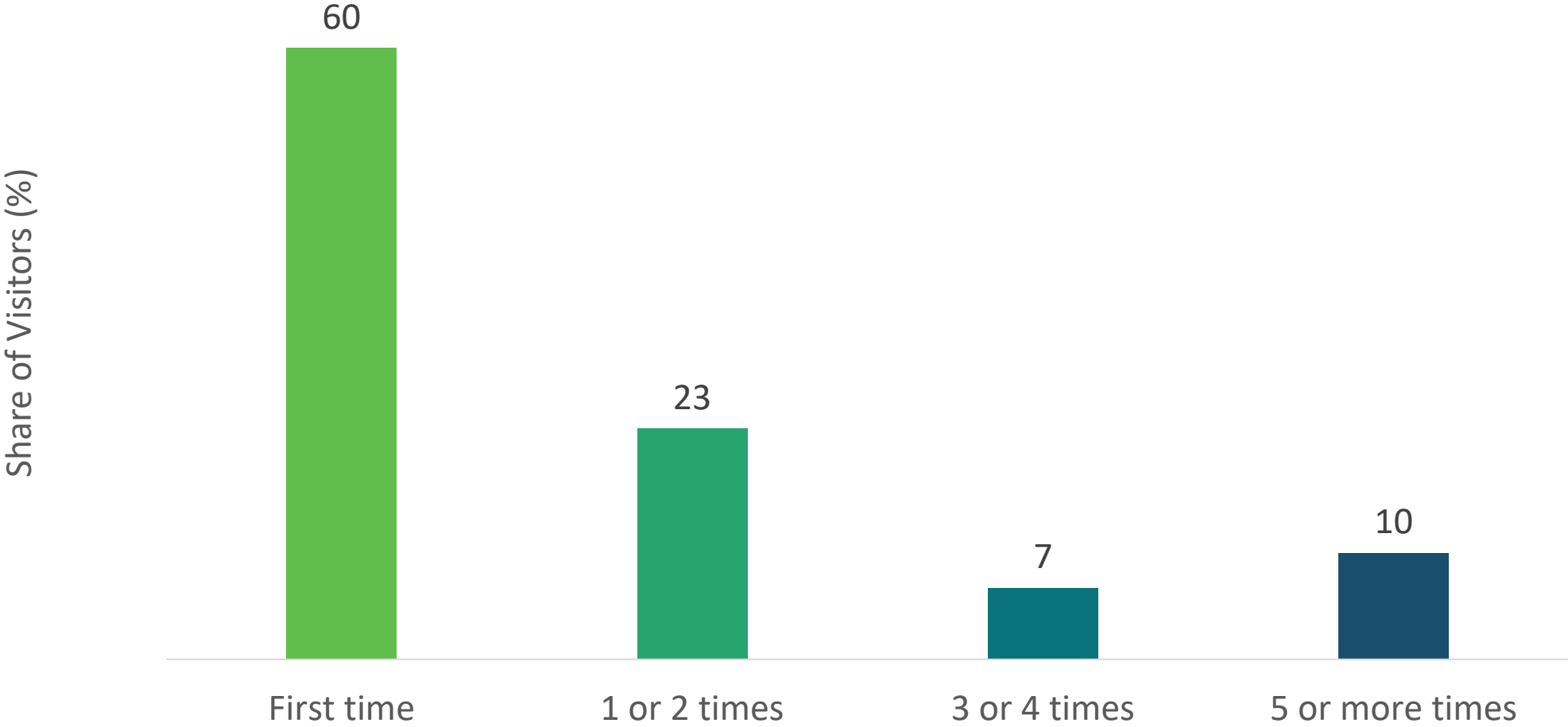


First-time and repeat visitors (Jan 2015 - Mar 2020 IVS Data): three segments New, Acquainted and Attached

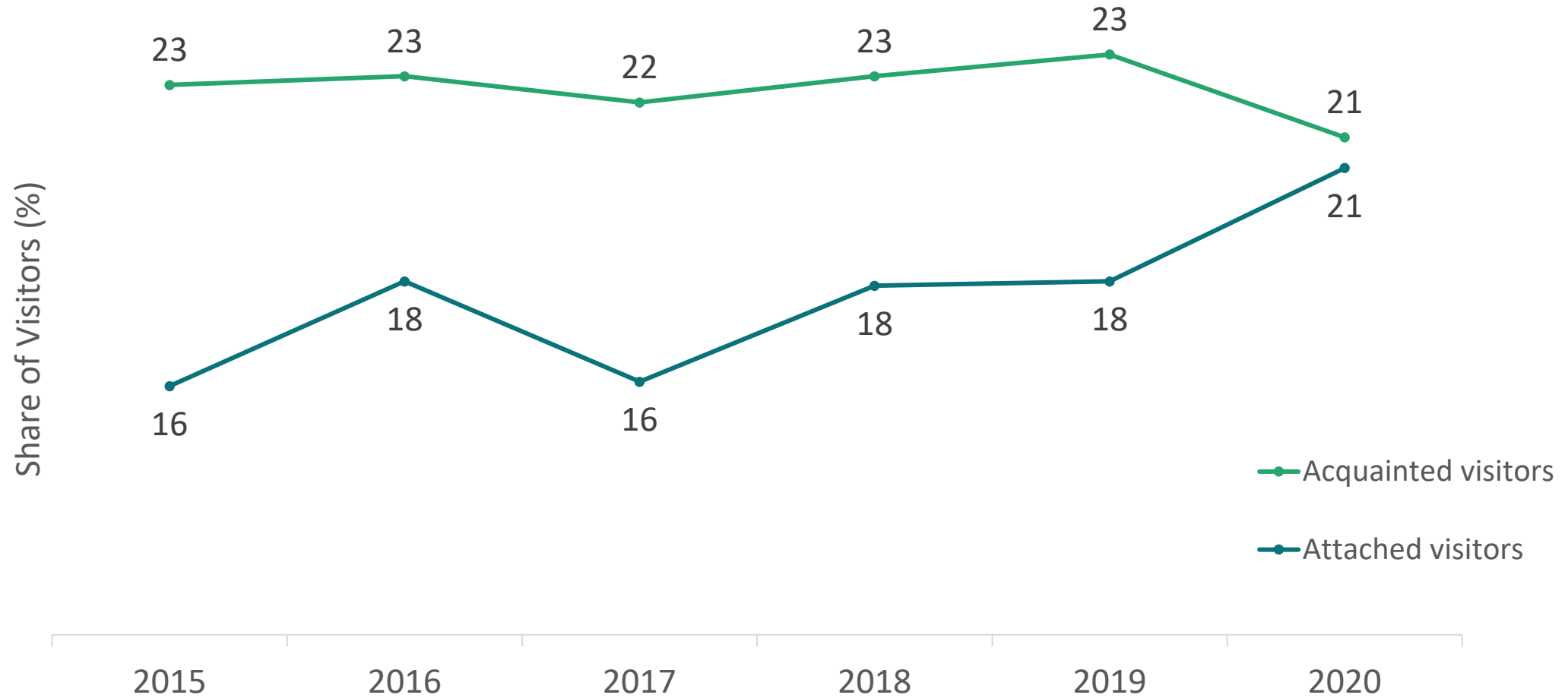


Note: based on total number of respondents 24,384.

17% of visitors are attached visitors (3 or more previous visits)

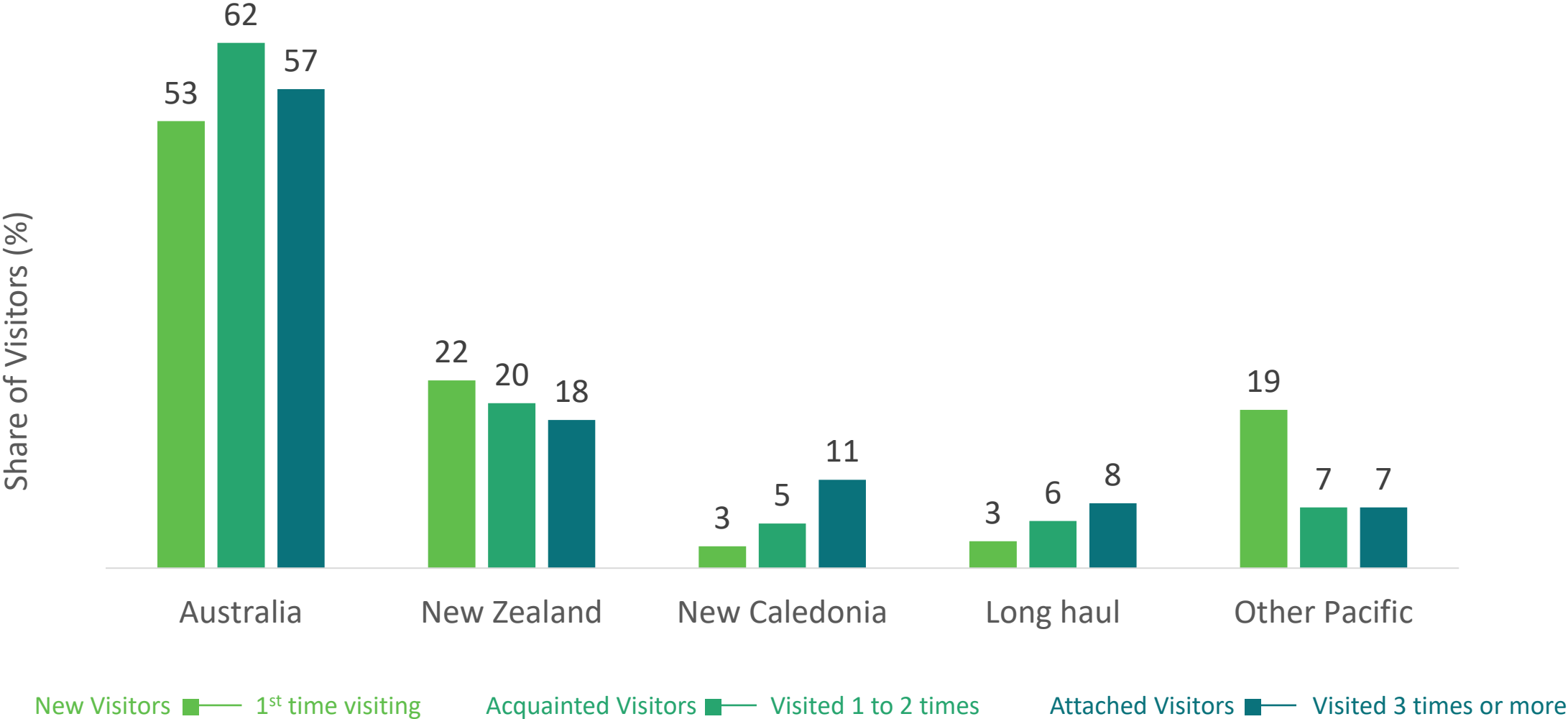


Attached visitors have increased by 31% over 5 years



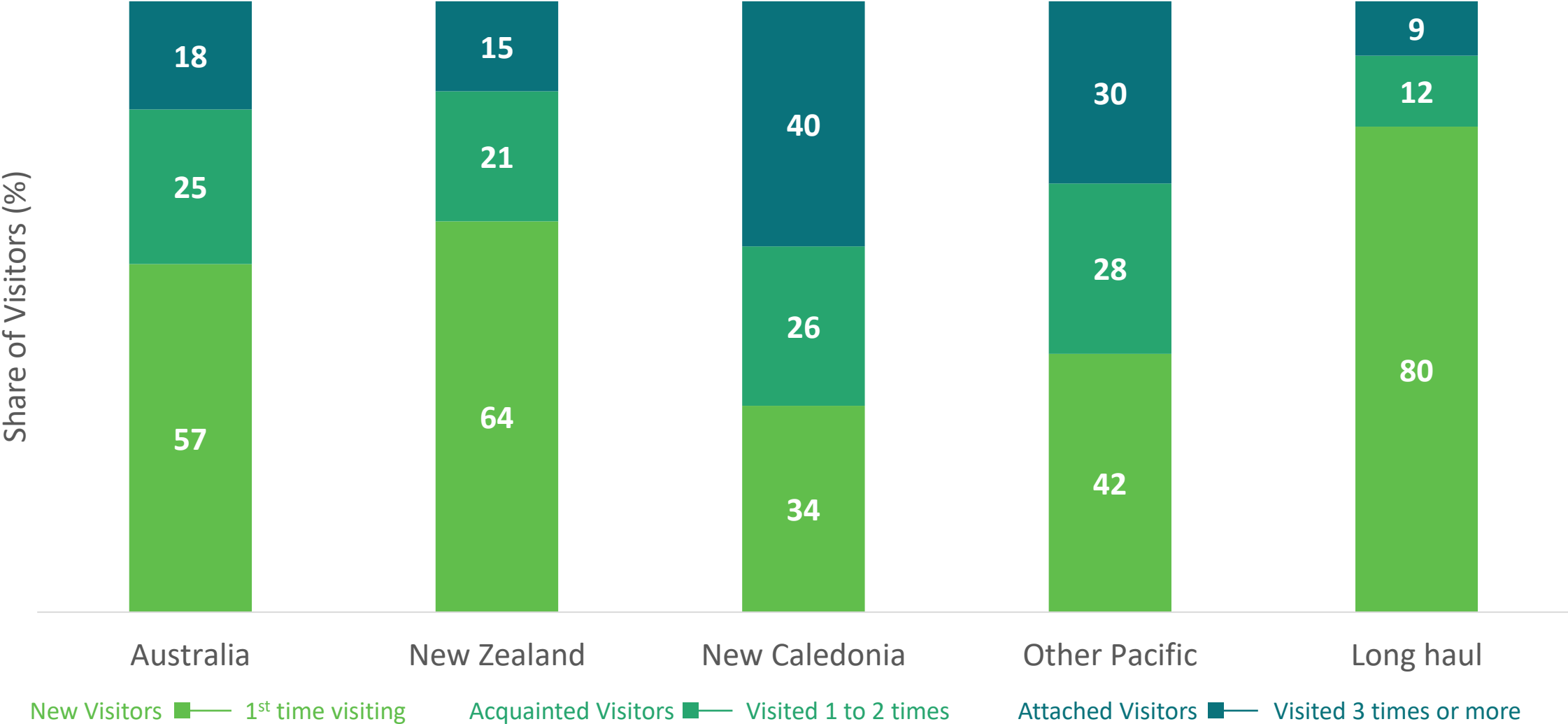
Acquainted Visitors ■ Visited 1 to 2 times Attached Visitors ■ Visited 3 times or more

Australia dominates the attached visitor market followed by New Zealand

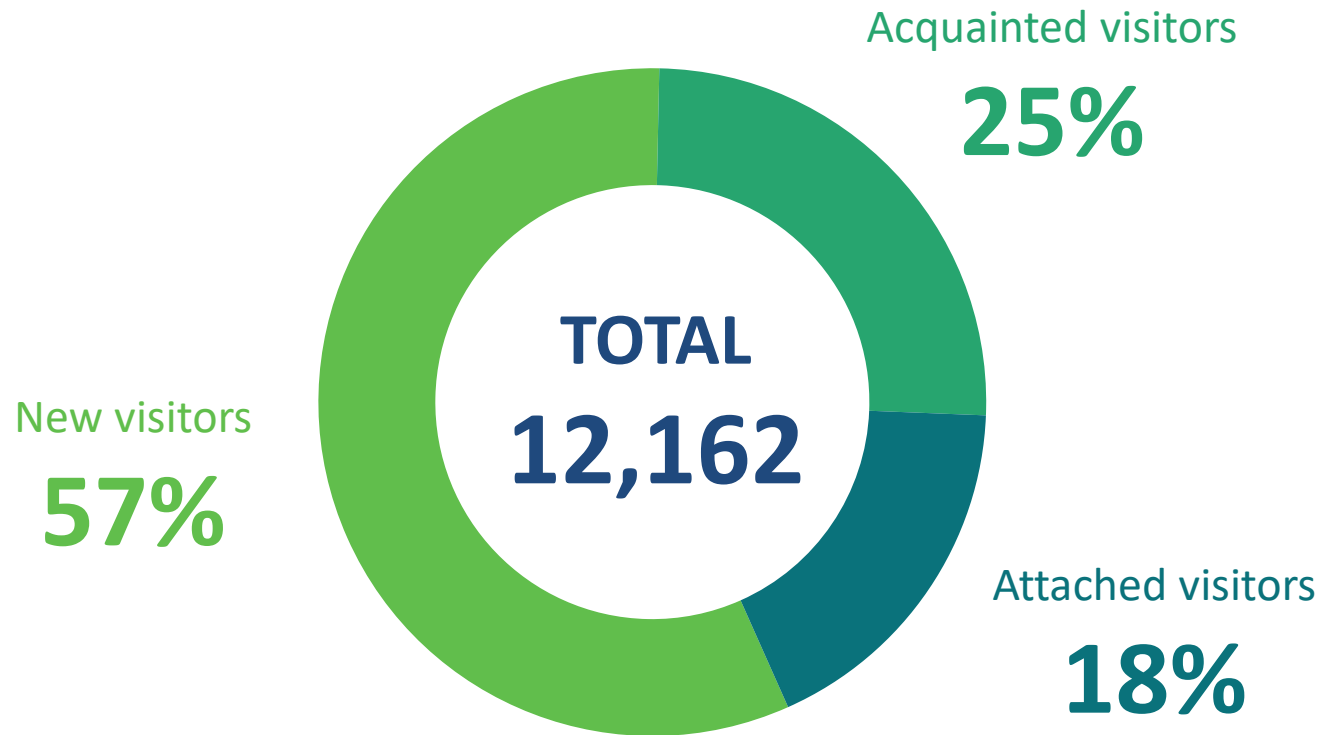


Note: due to rounding, some totals do not sum to 100%

New Caledonia has the highest ratio of attached visitors



18% of Australian visitors are attached visitors

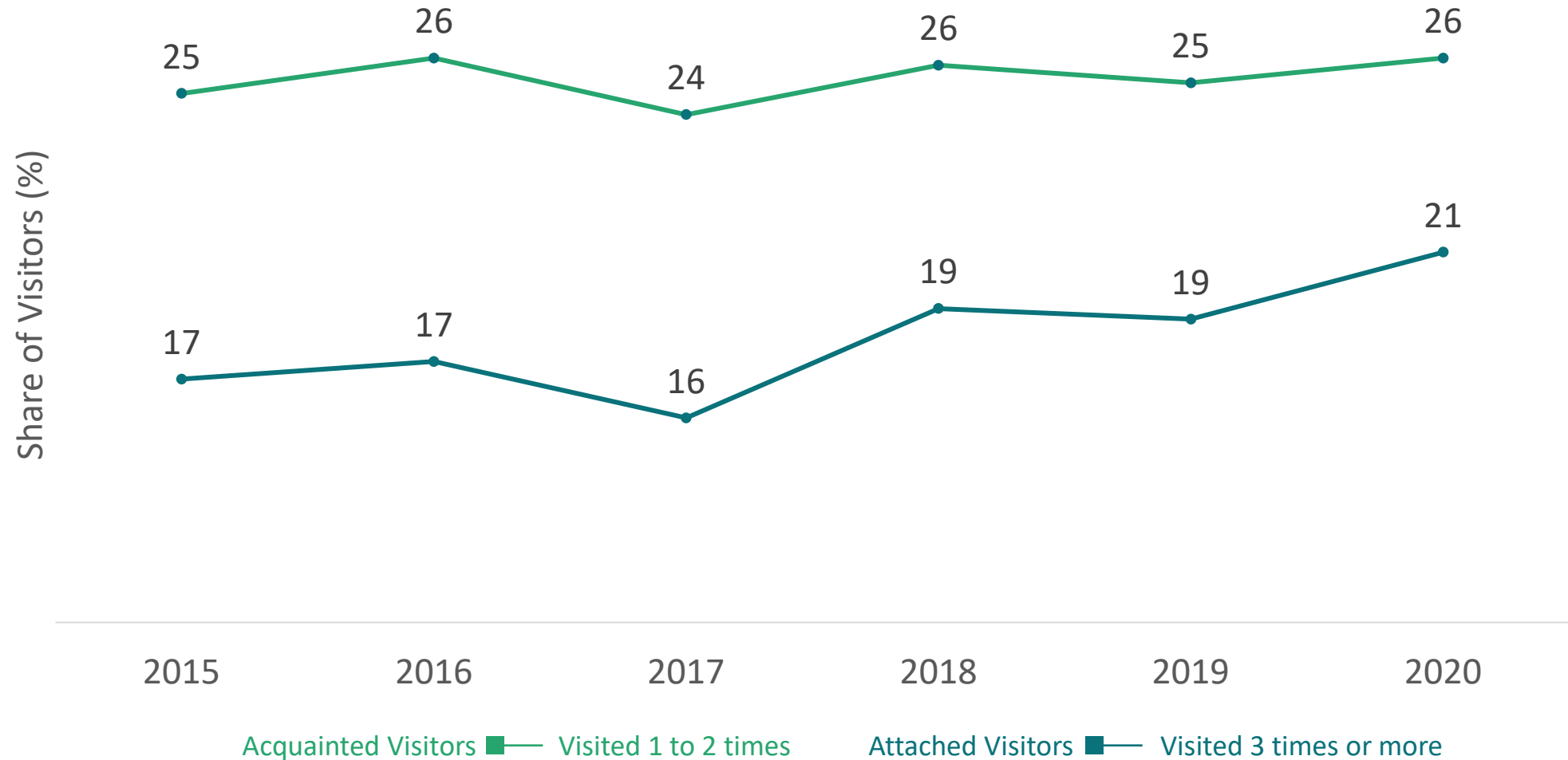


New Visitors ■ 1st time visiting

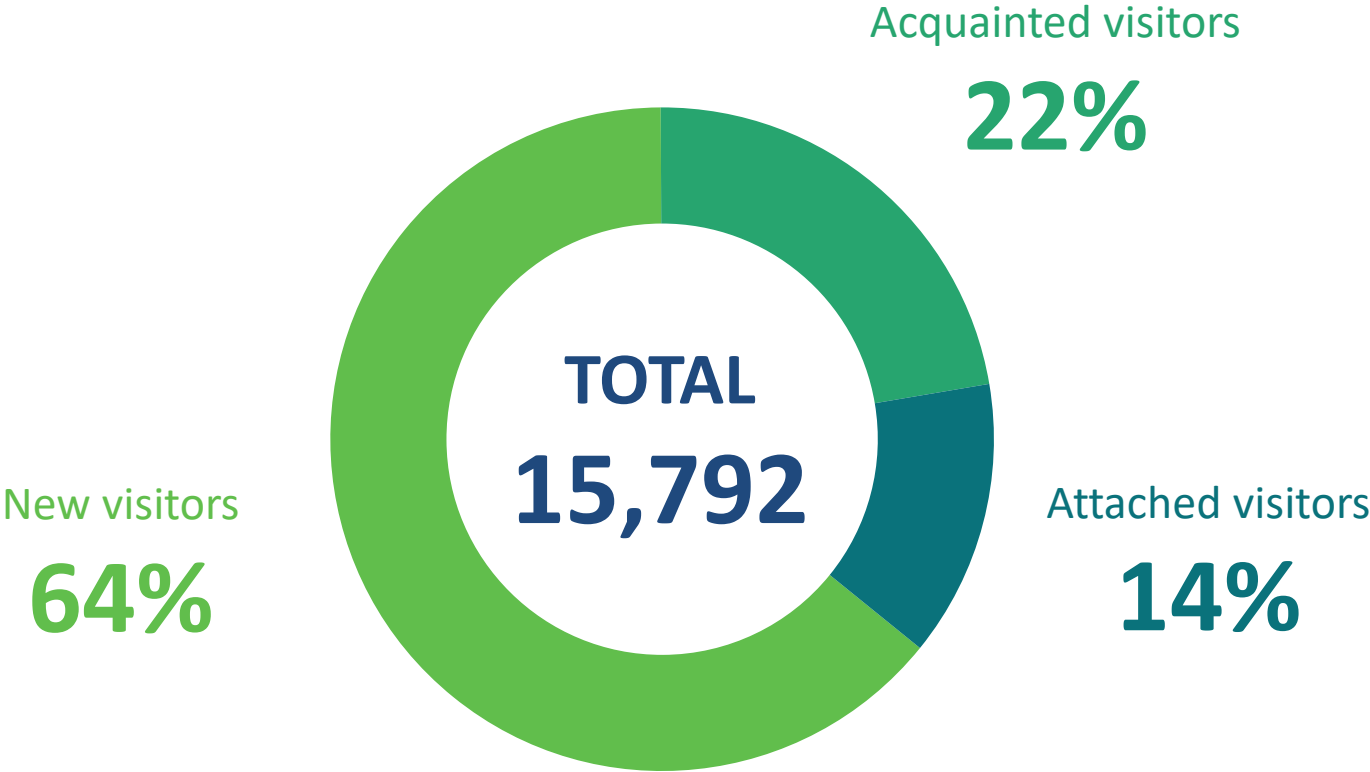
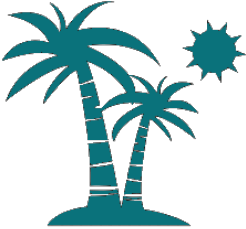
Acquainted Visitors ■ Visited 1 to 2 times

Attached Visitors ■ Visited 3 times or more

Attached visitors are growing in importance for the Australian market



14% of the Holiday market are attached travellers

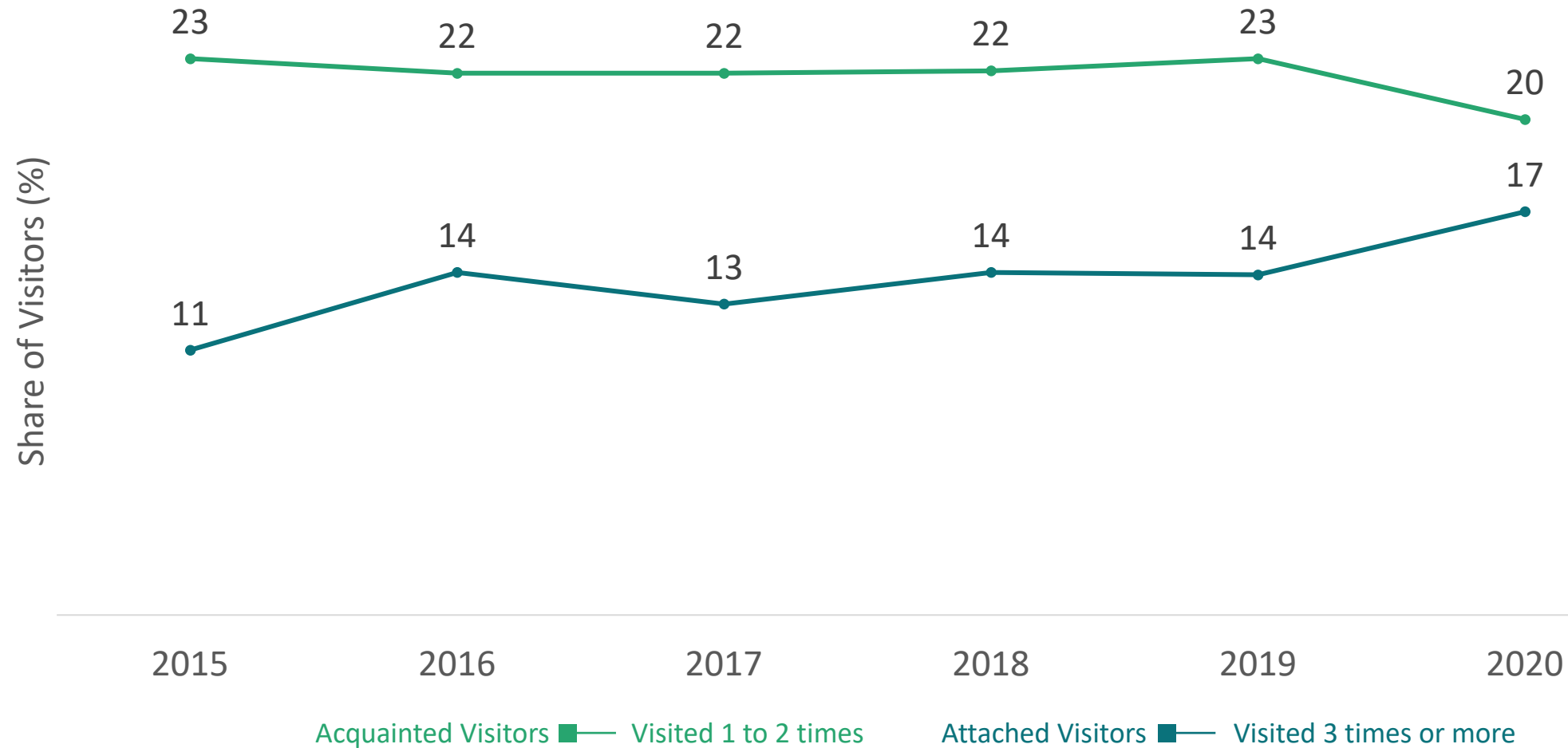


New Visitors ■ 1st time visiting

Acquainted Visitors ■ Visited 1 to 2 times

Attached Visitors ■ Visited 3 times or more

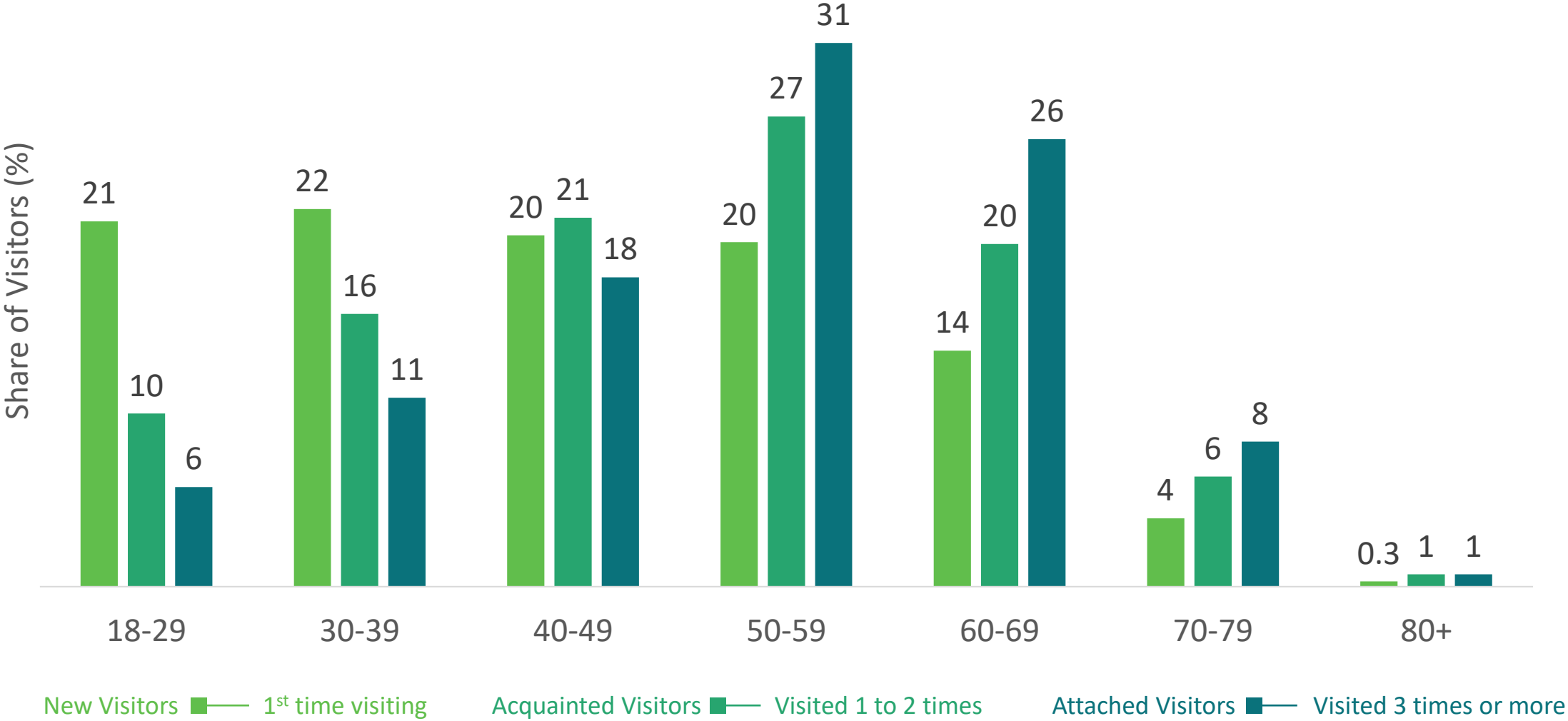
Attached visitor share of the Holiday market has grown by 55% since 2015



Report Structure

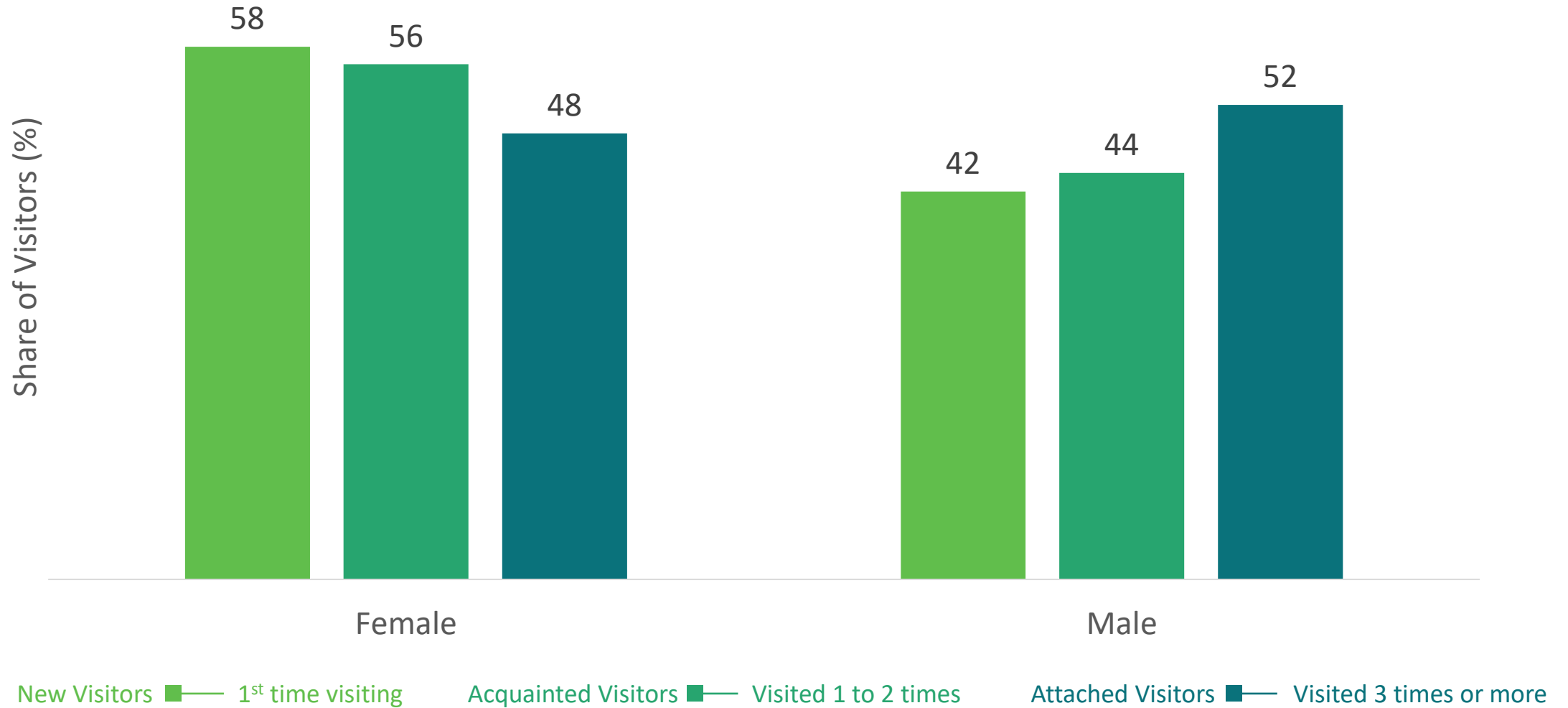


65% of attached visitors are over 50 years old



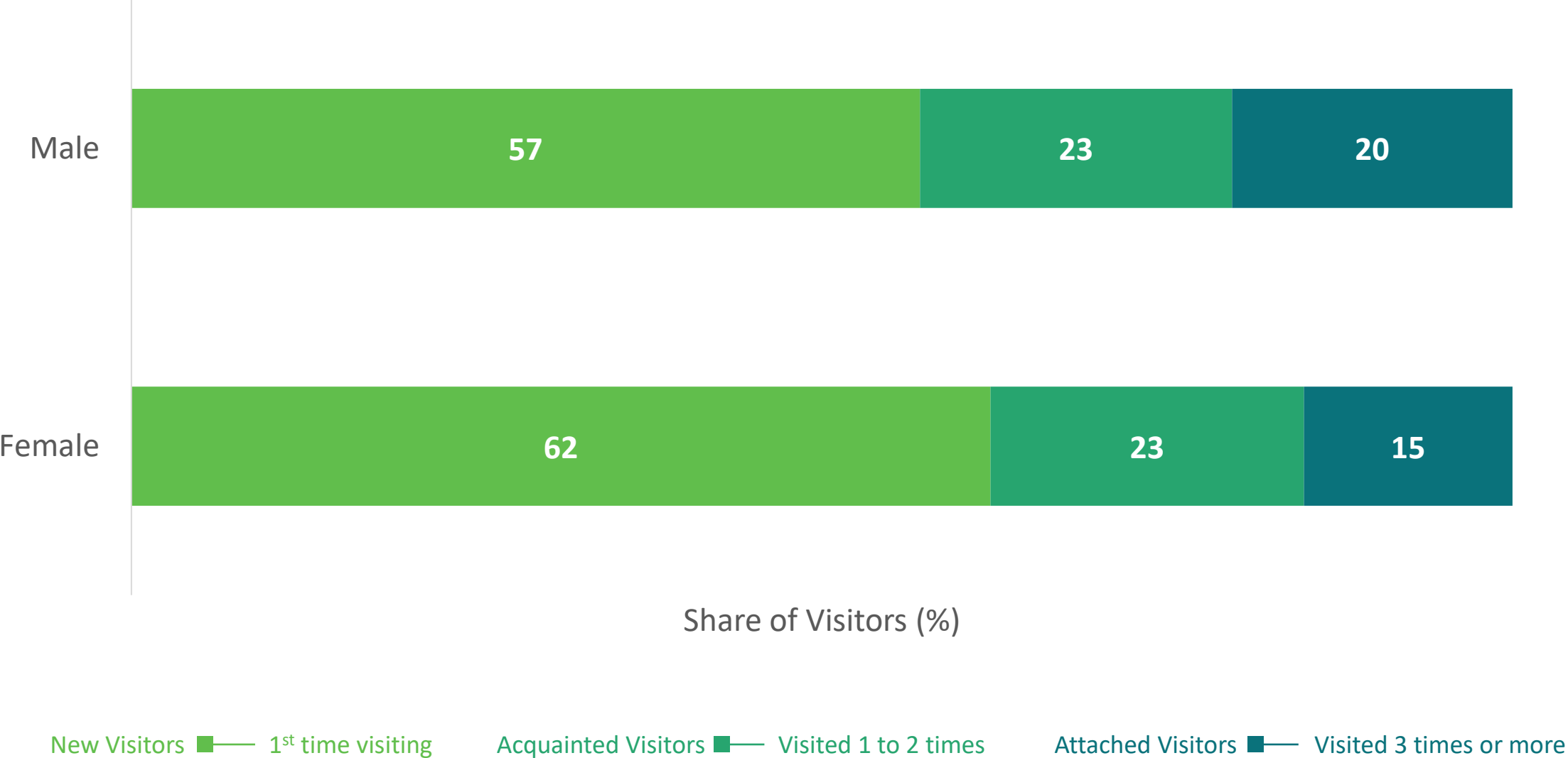
Note: due to rounding, total does not sum to 100%

Slightly more male than female for attached visitors

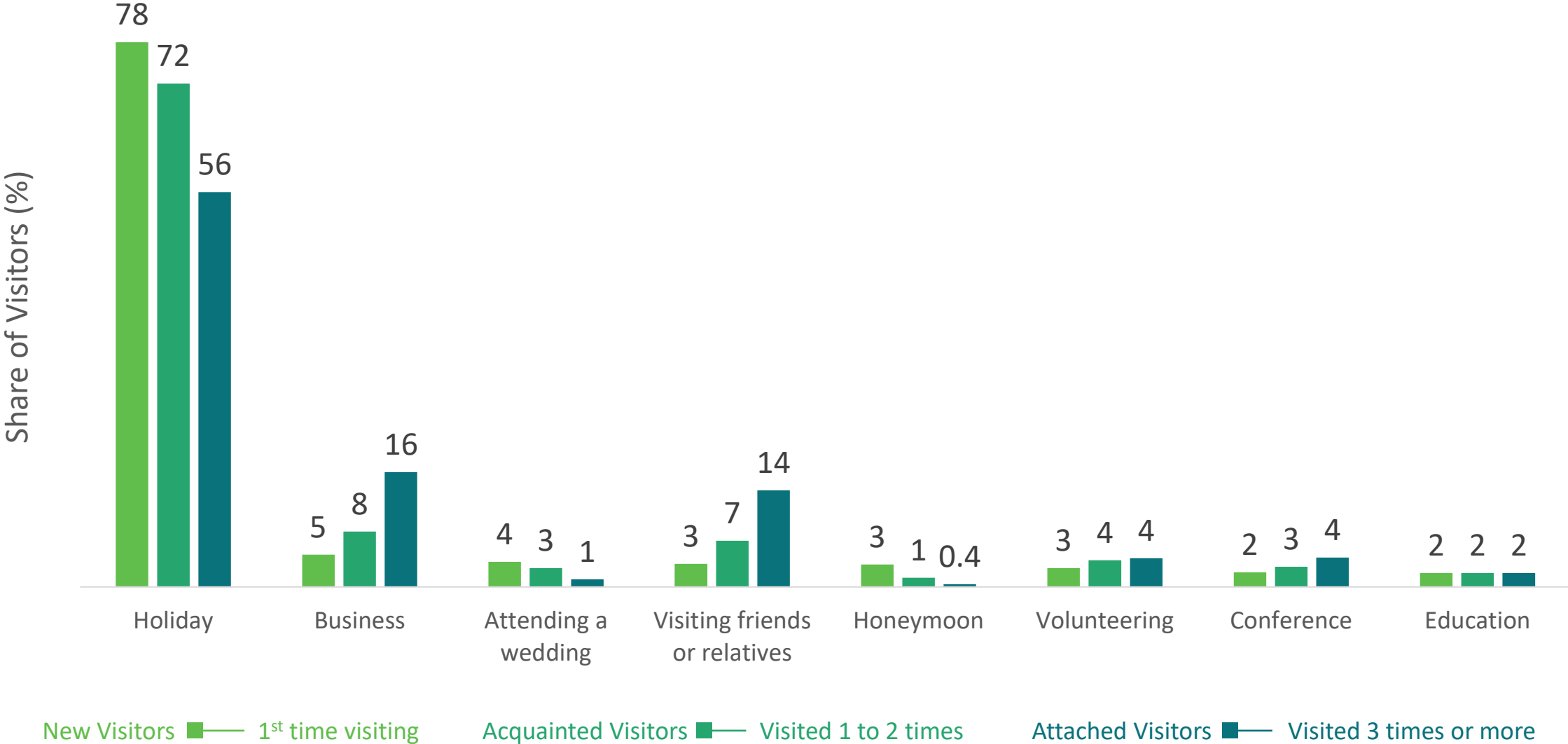


Note: due to rounding, total does not sum to 100%

Ratio for attached visitors is higher with male visitors

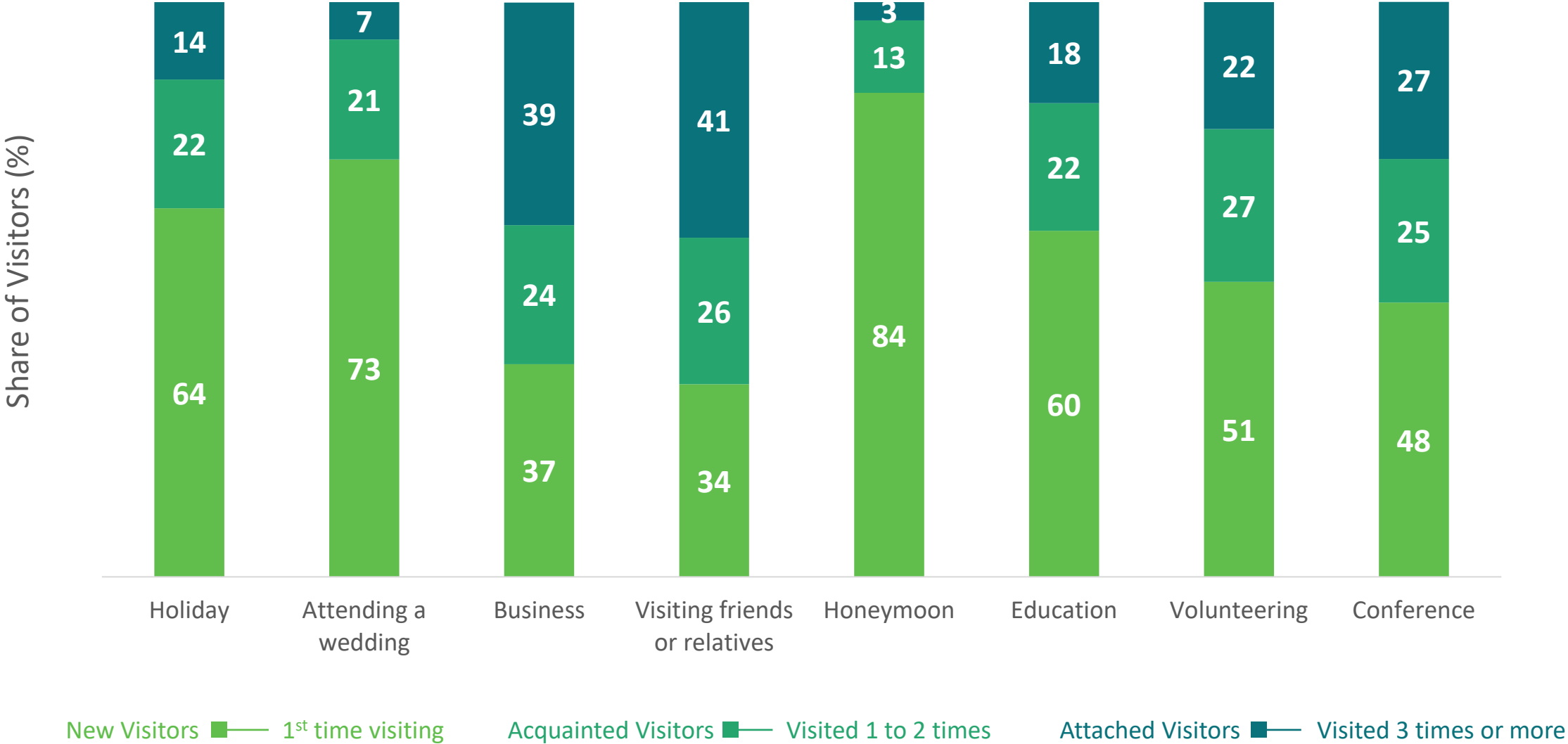


Holiday visitors dominate first time and repeat travel

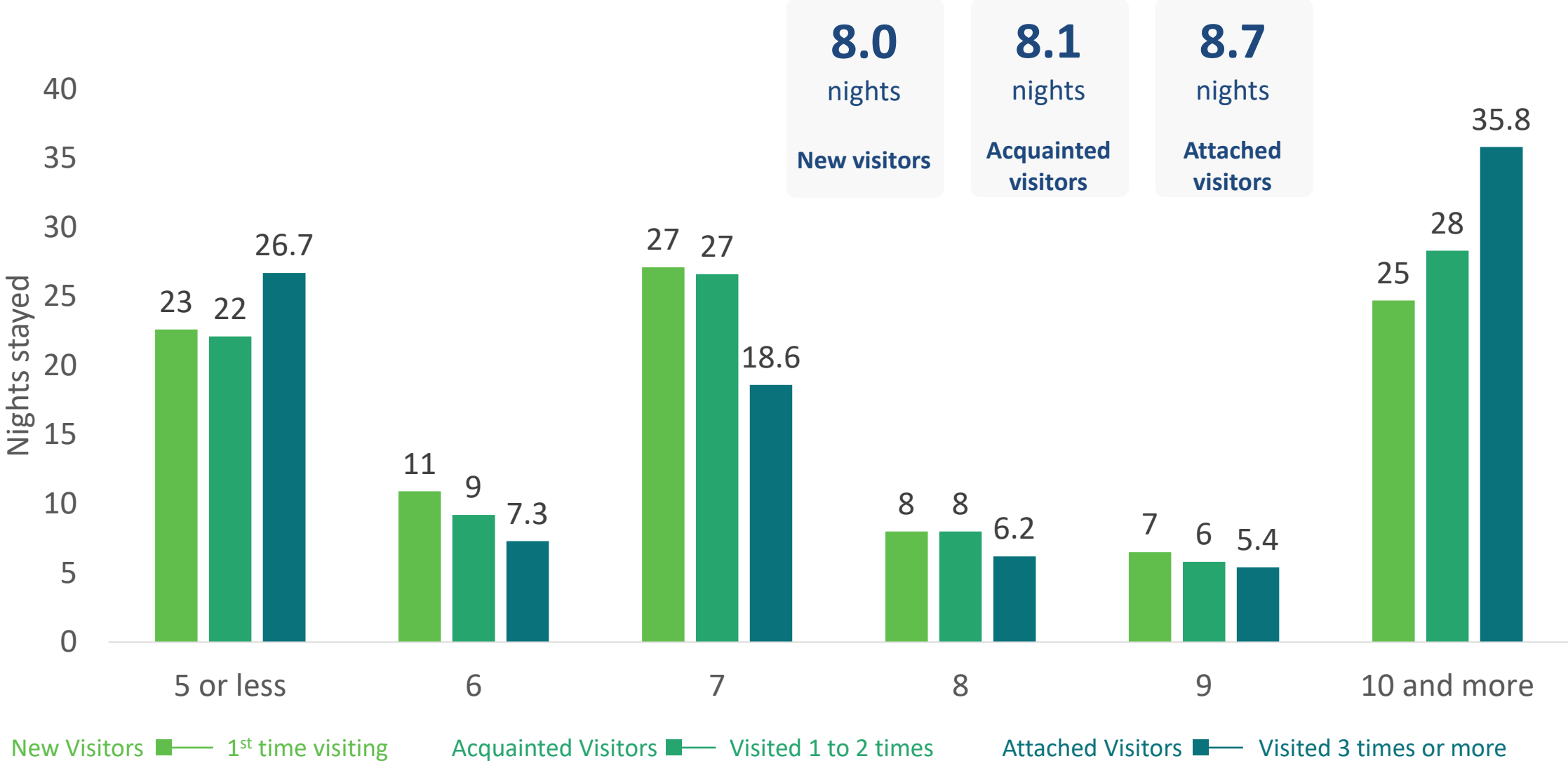


Note: due to rounding, some totals do not sum to 100%

Business and VFR travel are most heavily repeat visitor oriented

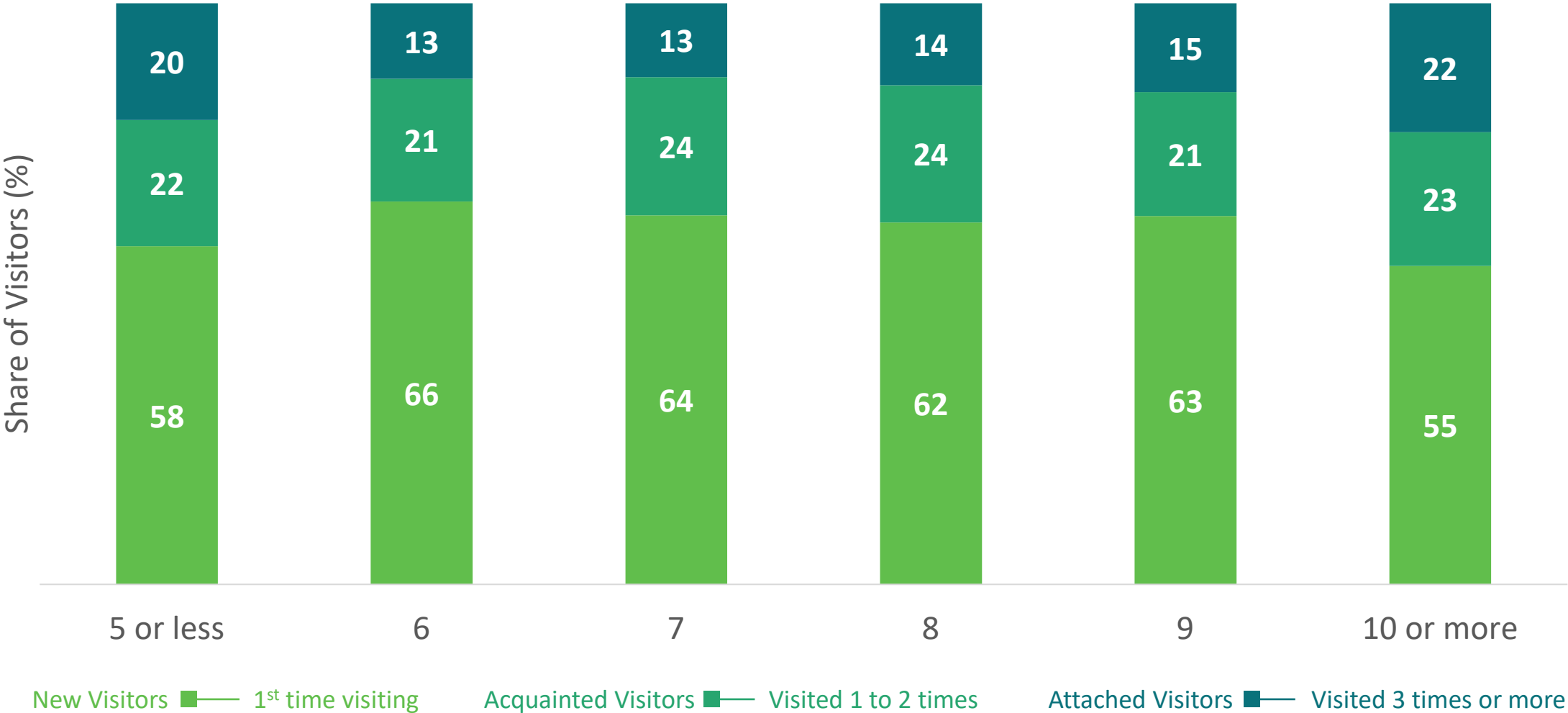


Attached visitors stay longer

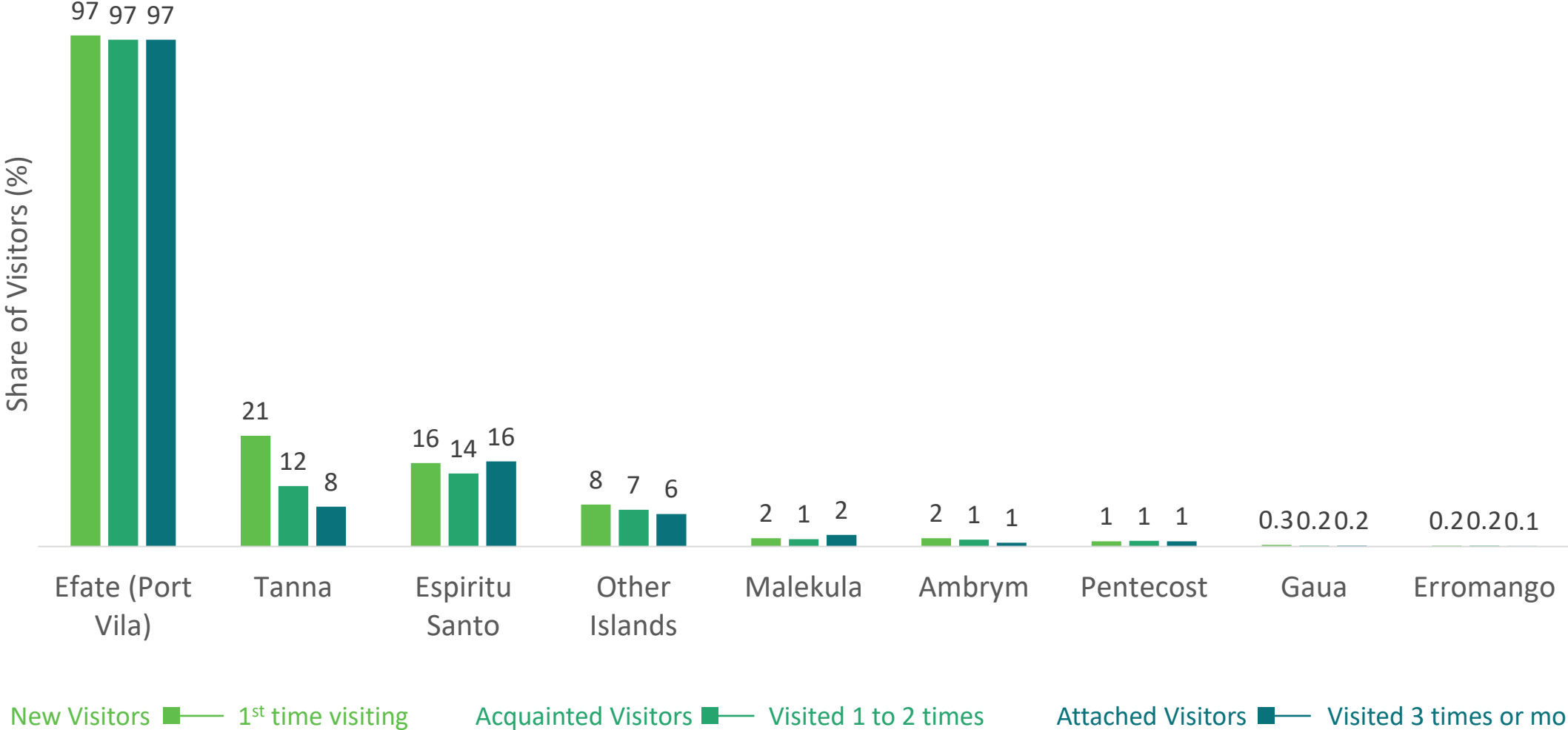


Note: 31 and 31+ days as outliers were removed for length of stay analysis

Attached visitors are most represented among short and long term stay groupings



Islands visited are similar for repeat and first-time visitors with the exception of Tanna

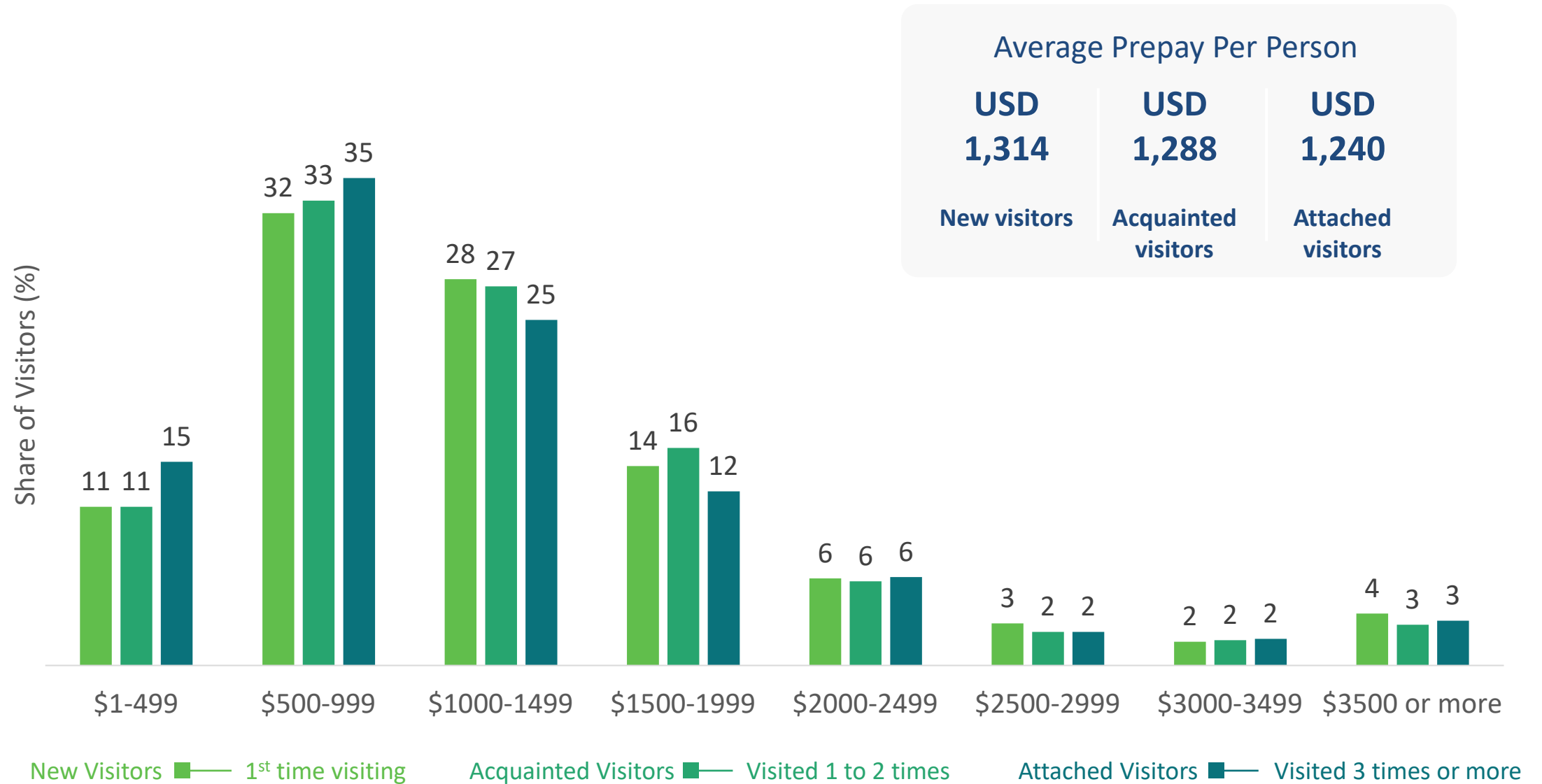


Note: Multiple responses, therefore total does not add up to 100%

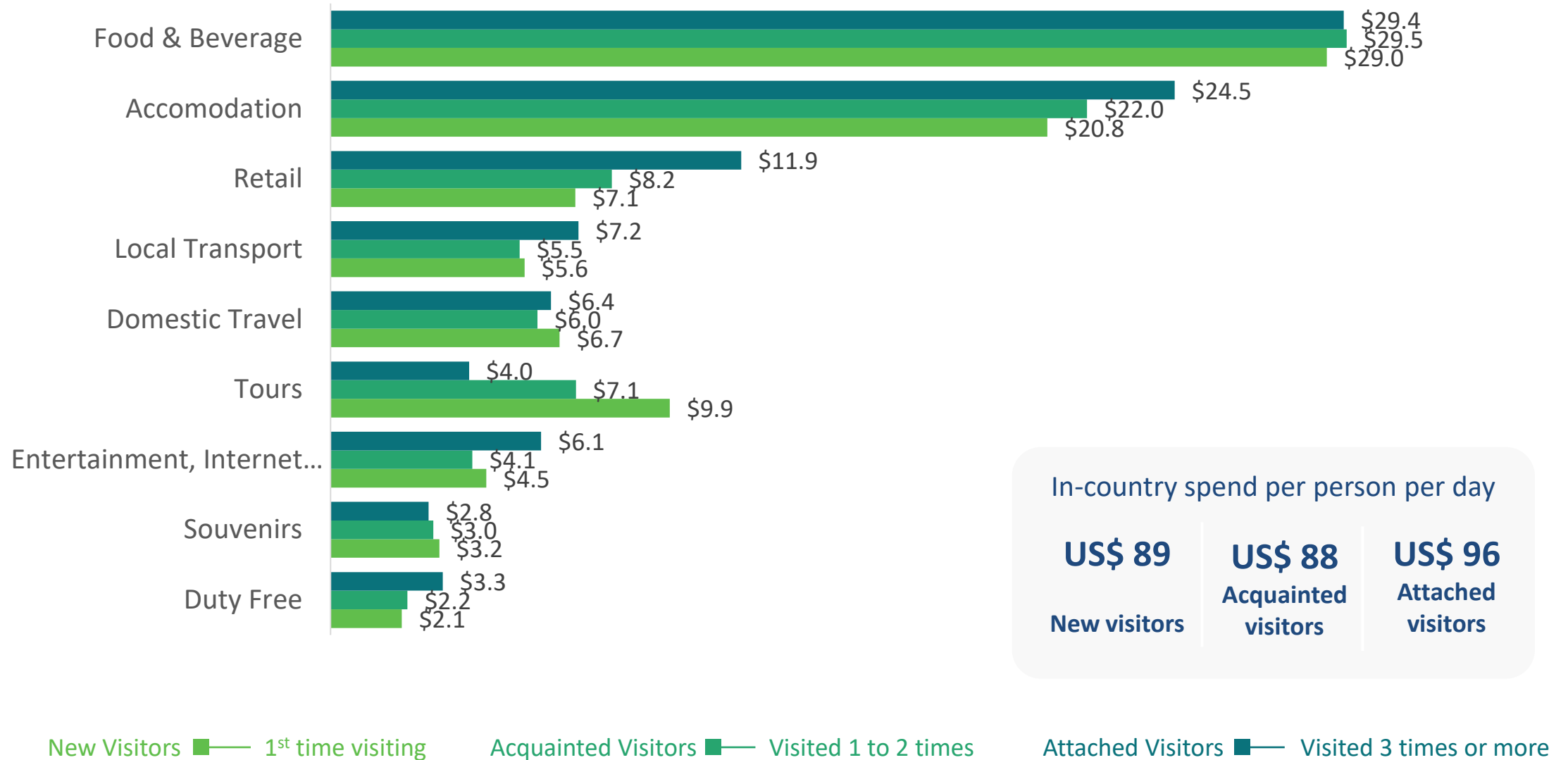
Report Structure



Prepaid expenditure by attached visitors is the lowest





In-country spend per day is the highest for attached visitors



Note: US\$ in the pie chart

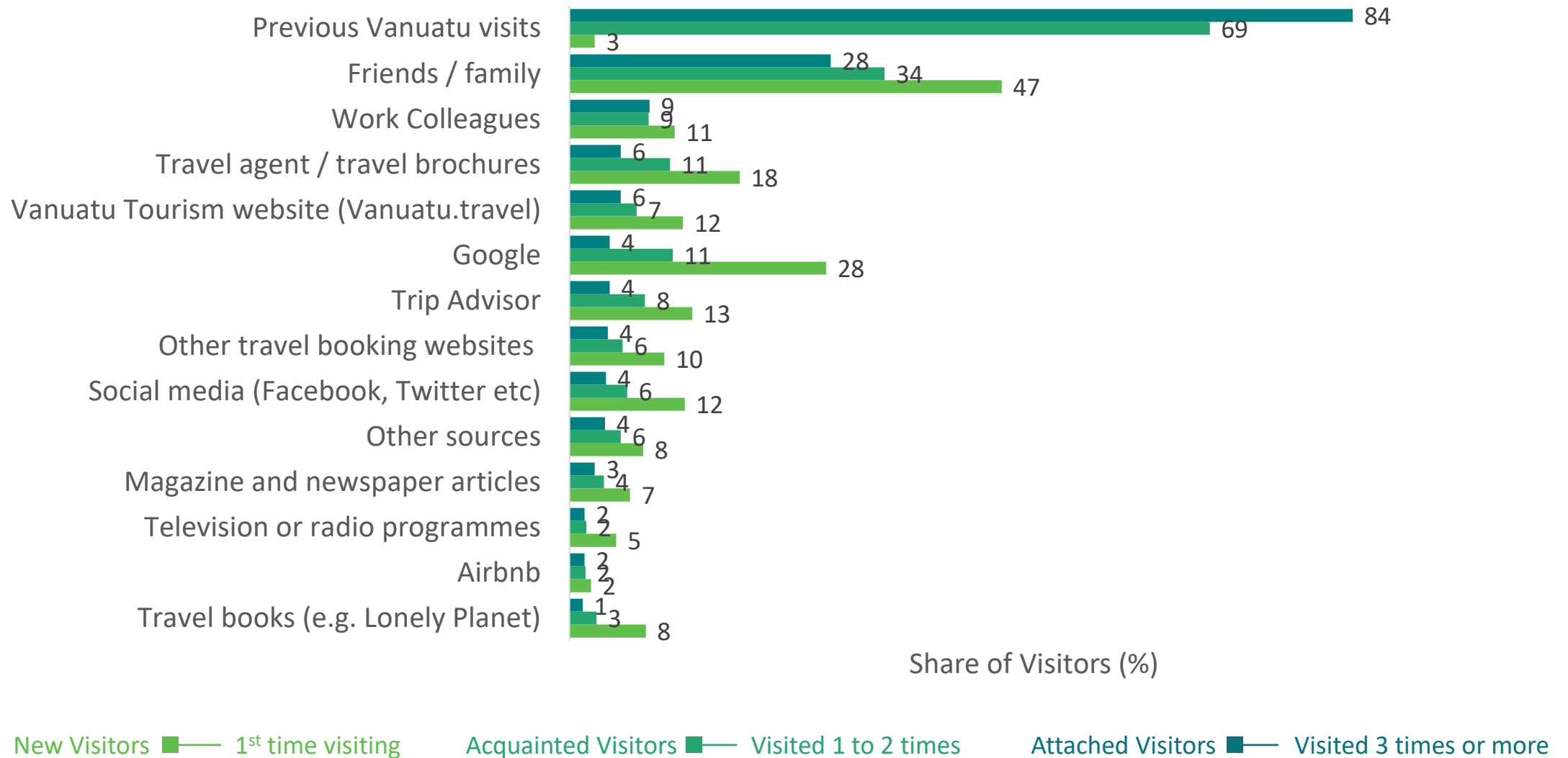
Attached visitors have the highest overall spend per trip

		Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
 Per Day	First-time	US \$102 Vt \$11,224		US \$89 Vt \$9,728		US \$191 Vt \$20,952
	1-2 times	US \$99 Vt \$10,838		US \$88 Vt \$9,607		US \$187 Vt \$20,445
	3 times or more	US \$89 Vt \$9,738		US \$96 Vt \$10,498		US \$185 Vt \$20,236
 Whole Trip	First-time	US \$821 Vt \$90,016		US \$712 Vt \$78,017		US \$1,533 Vt \$168,033
	1-2 times	US \$805 Vt \$88,221		US \$713 Vt \$78,205		US \$1,518 Vt \$166,426
	3 times or more	US \$775 Vt \$84,918		US \$835 Vt \$91,542		US \$1,610 Vt \$176,460

Report Structure

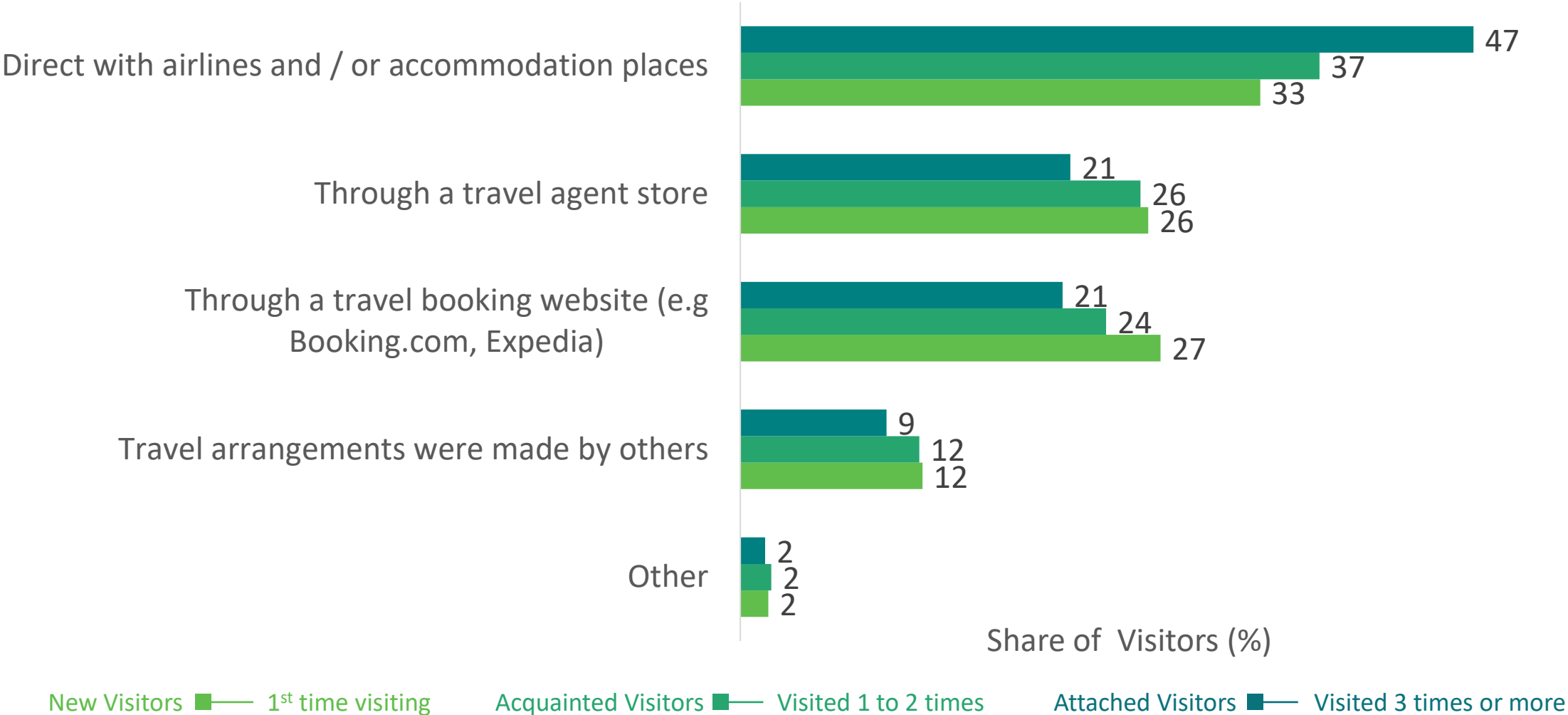


Attached and acquainted visitors rely heavily on their previous visit for information (IVS Jan 2018 - Mar 2020)



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

Attached visitors are more likely to book directly with businesses (IVS Jan 2018 - Mar 2020)

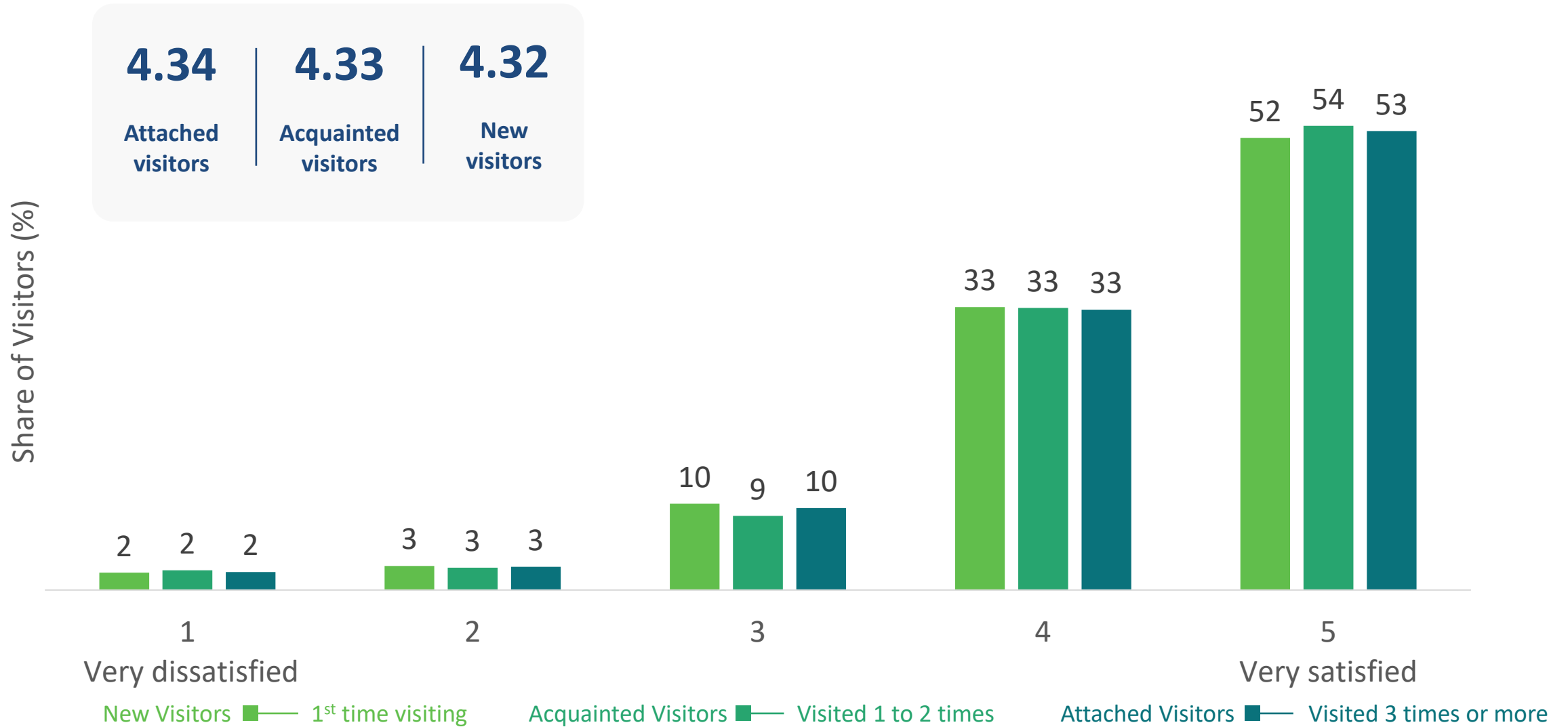


Note: due to rounding, total does not sum to 100%

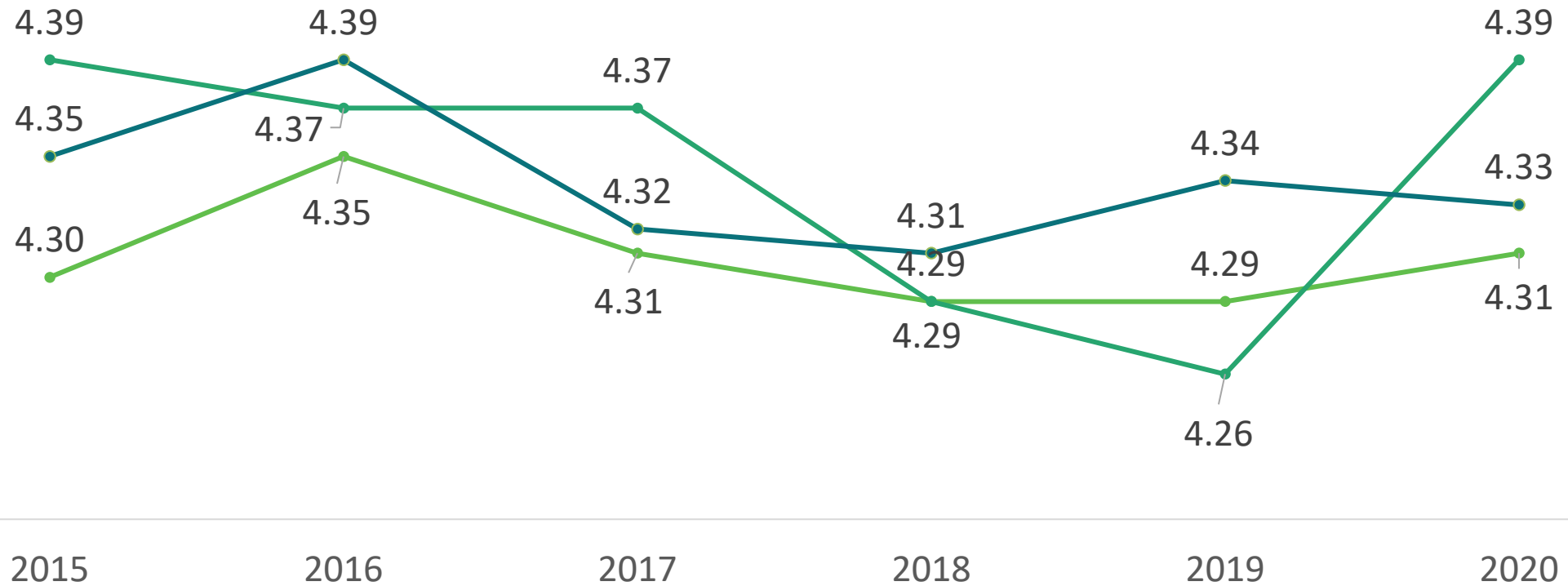
Report Structure



Attached visitors are slightly more satisfied overall



Visitor satisfaction rates have remained relatively consistent over time with acquainted visitors showing the greatest fluctuation

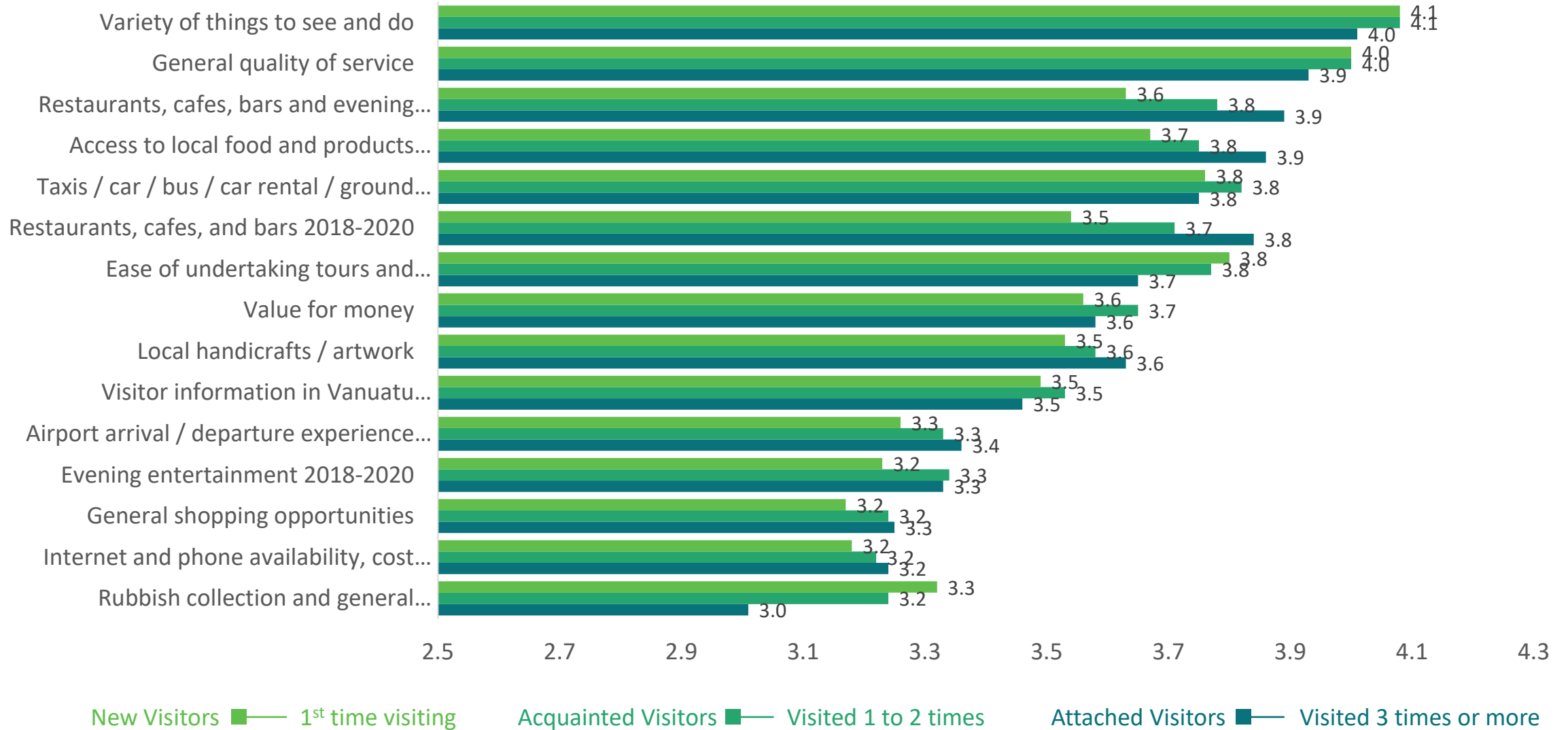


New Visitors ■ 1st time visiting

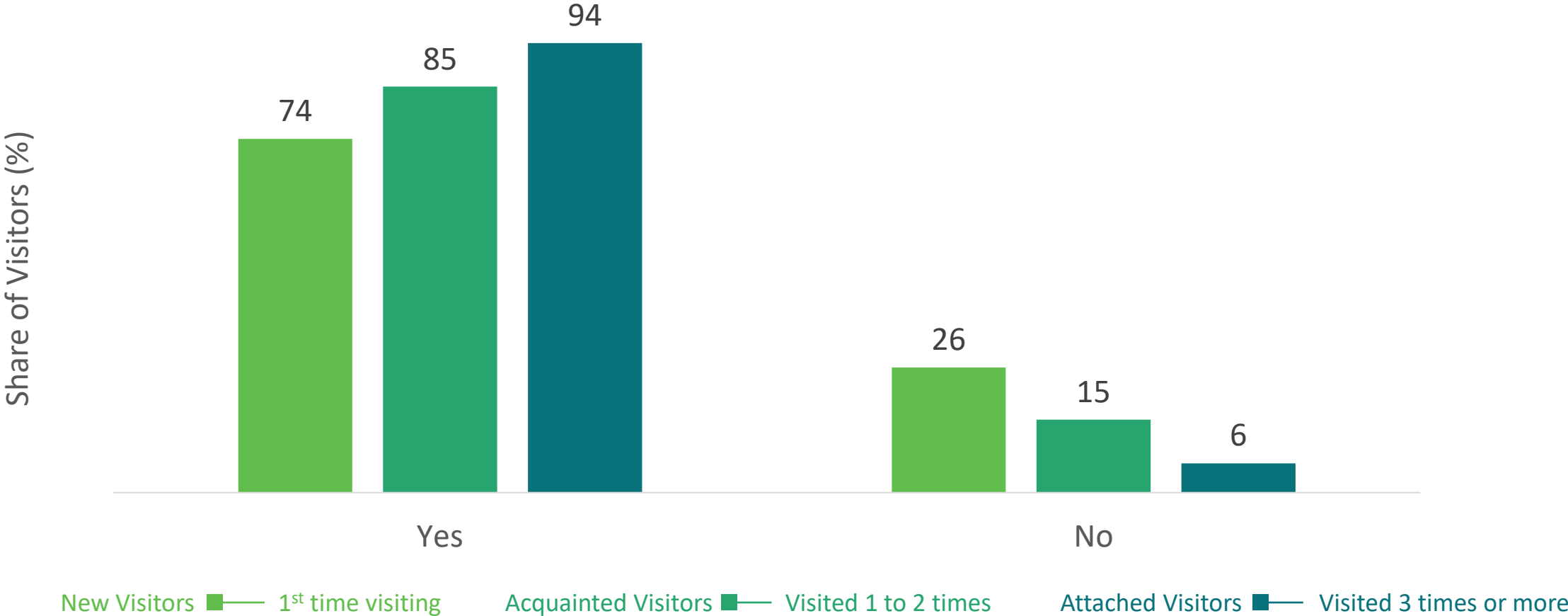
Acquainted Visitors ■ Visited 1 to 2 times

Attached Visitors ■ Visited 3 times or more

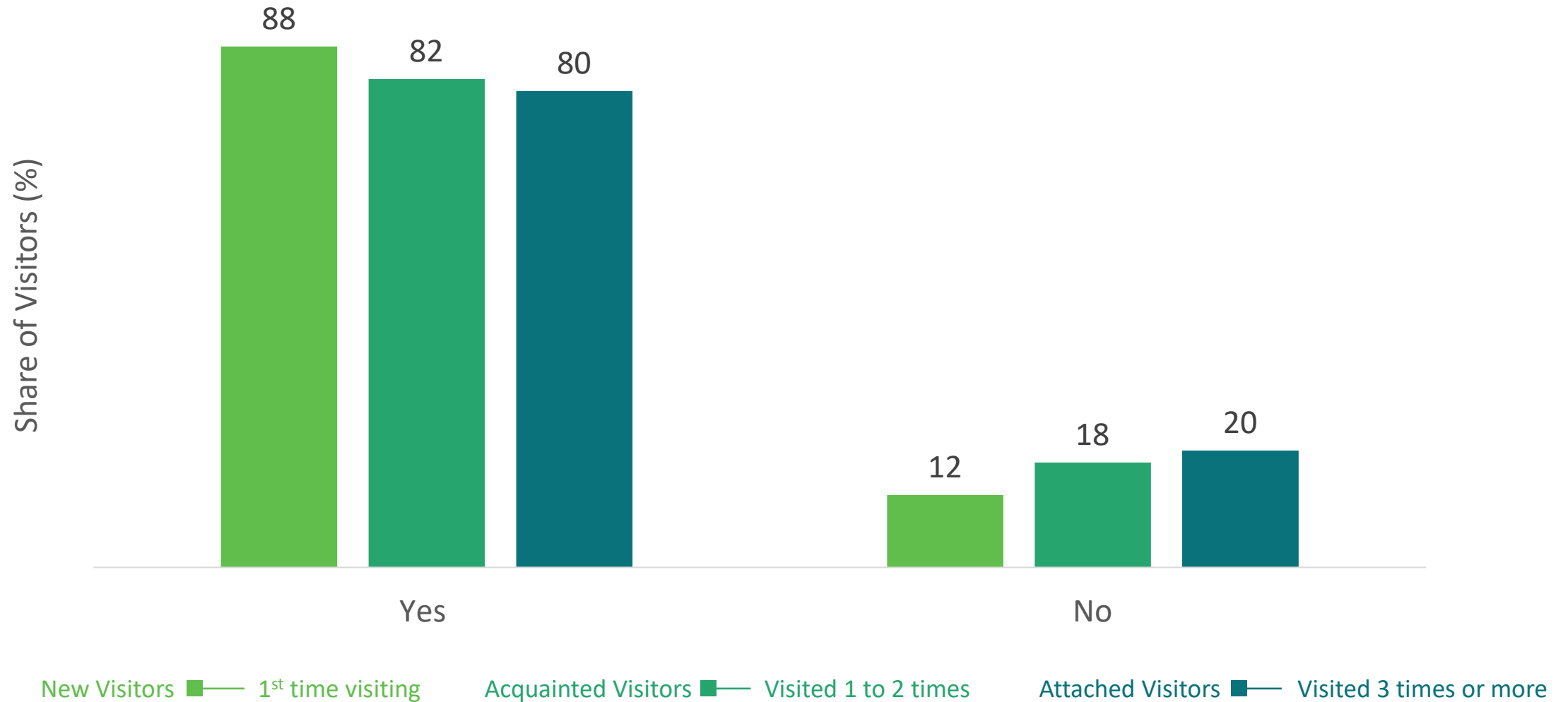
Attached visitors are more satisfied with local restaurant and cafes and less satisfied with rubbish and cleanliness



Attached visitors show a higher willingness to return



Attached visitors show less willingness to visit Outer Islands in the future



Attached visitors are more willing to recommend Vanuatu



An aerial photograph of a tropical island. The island is covered in lush greenery, including palm trees and other tropical plants. Several small, simple huts with thatched roofs are scattered across the island. A narrow path or road winds through the vegetation. The island is surrounded by a clear, shallow turquoise lagoon that transitions into a sandy beach and then into deeper, darker blue water. The overall scene is peaceful and idyllic.

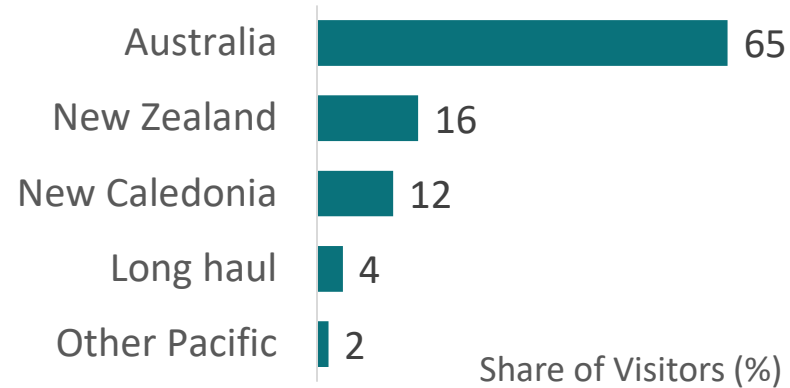
HOLIDAY MARKET BREAKDOWN



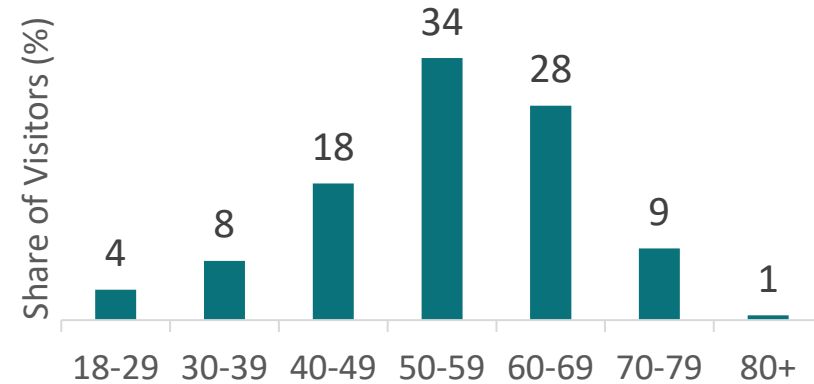
Holiday only attached visitors



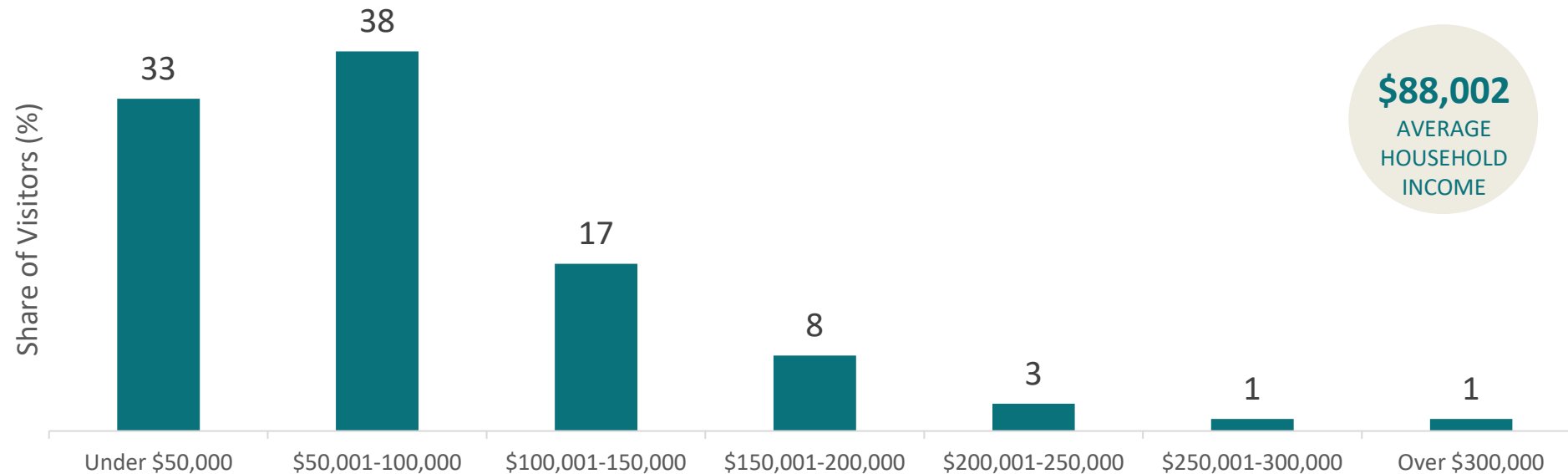
Country of Residency



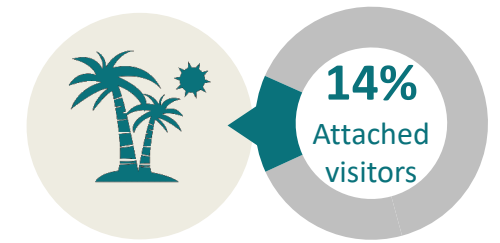
Age Group



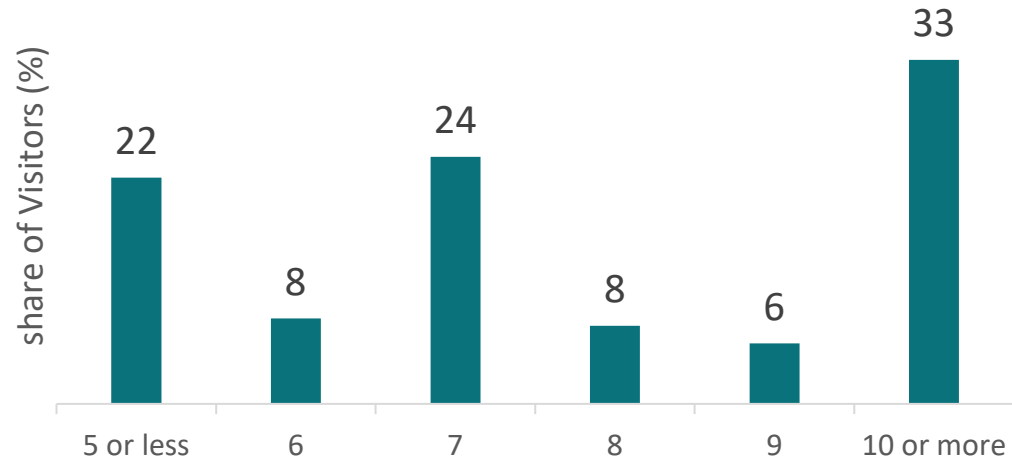
Household Income



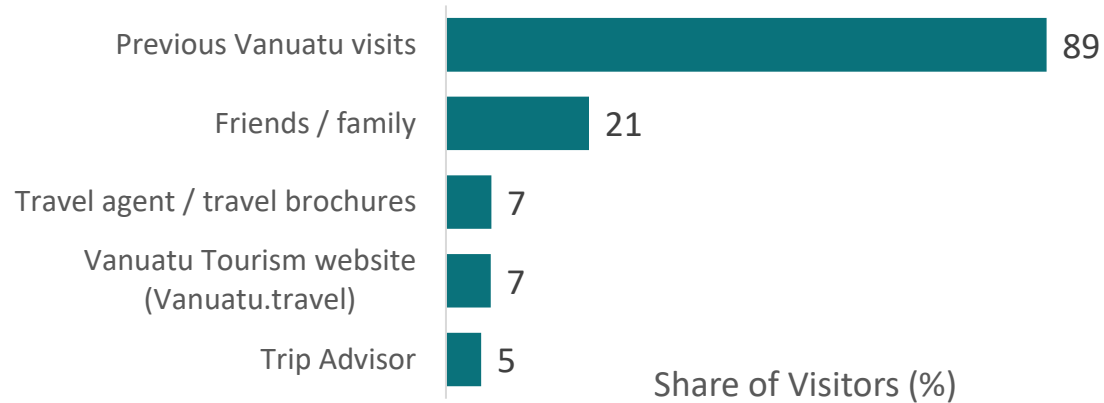
Holiday only attached visitors



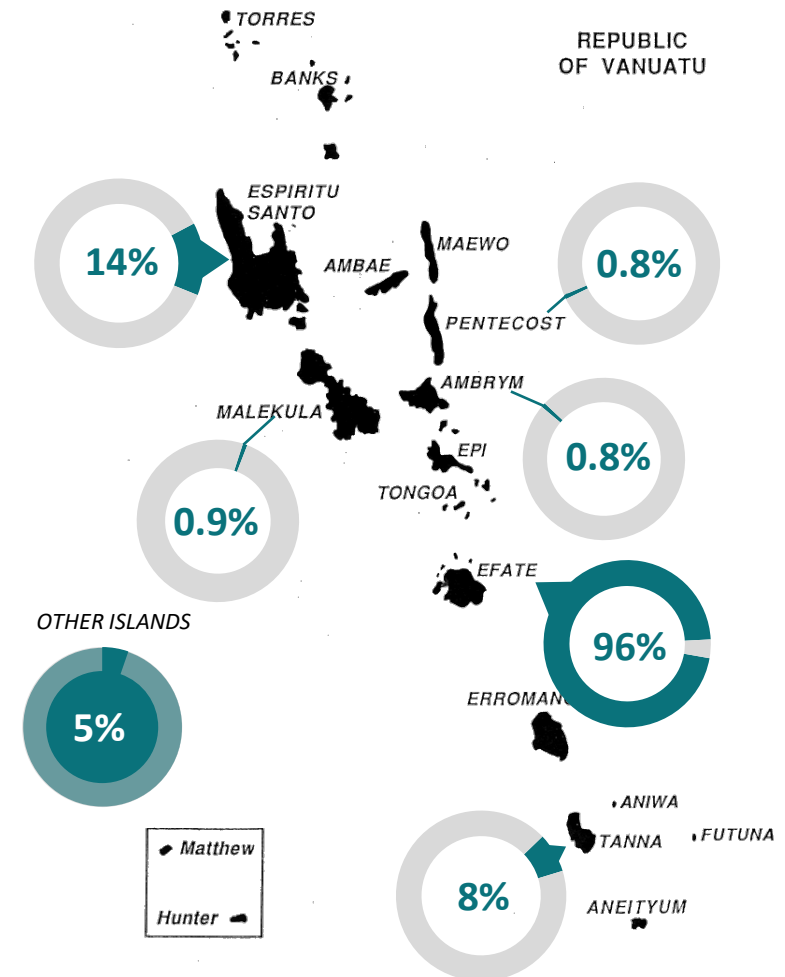
Length of Stay



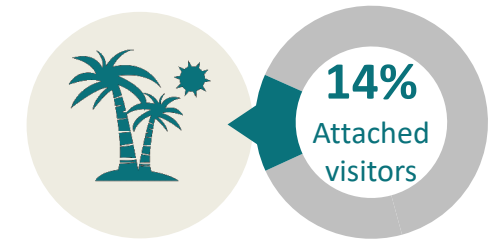
Information Sources Top 5*



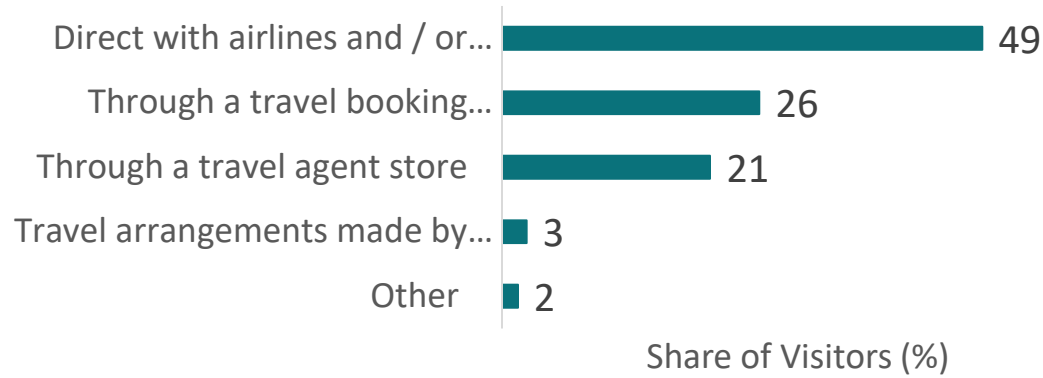
Island Visited



Holiday only attached visitors



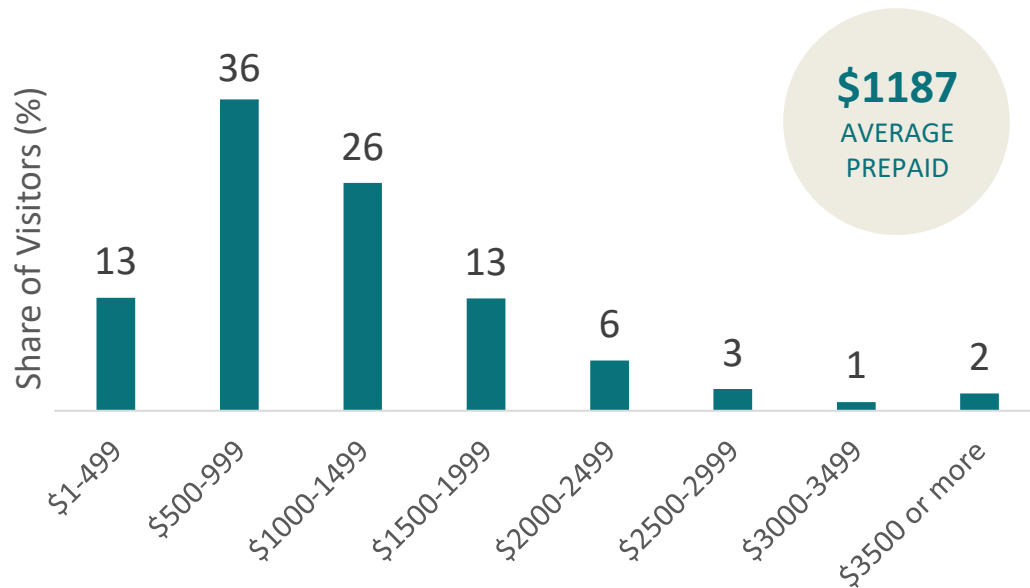
Travel Purchase



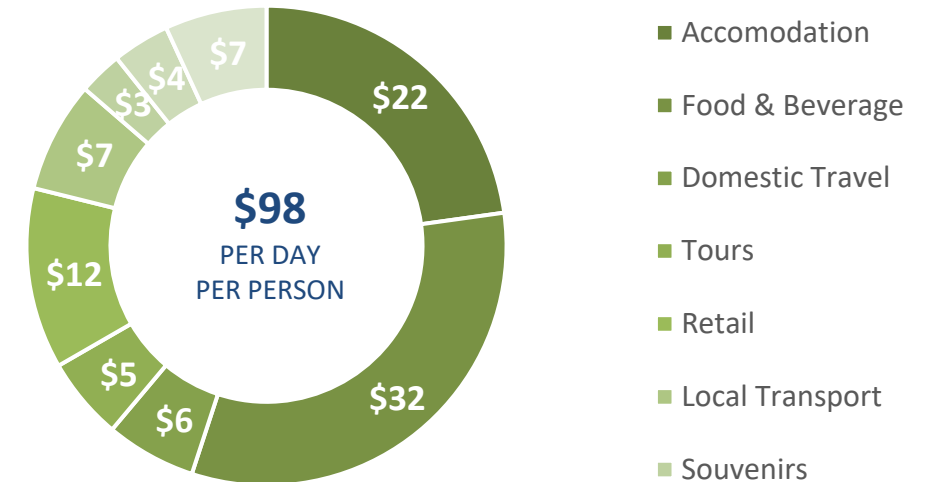
Total spend



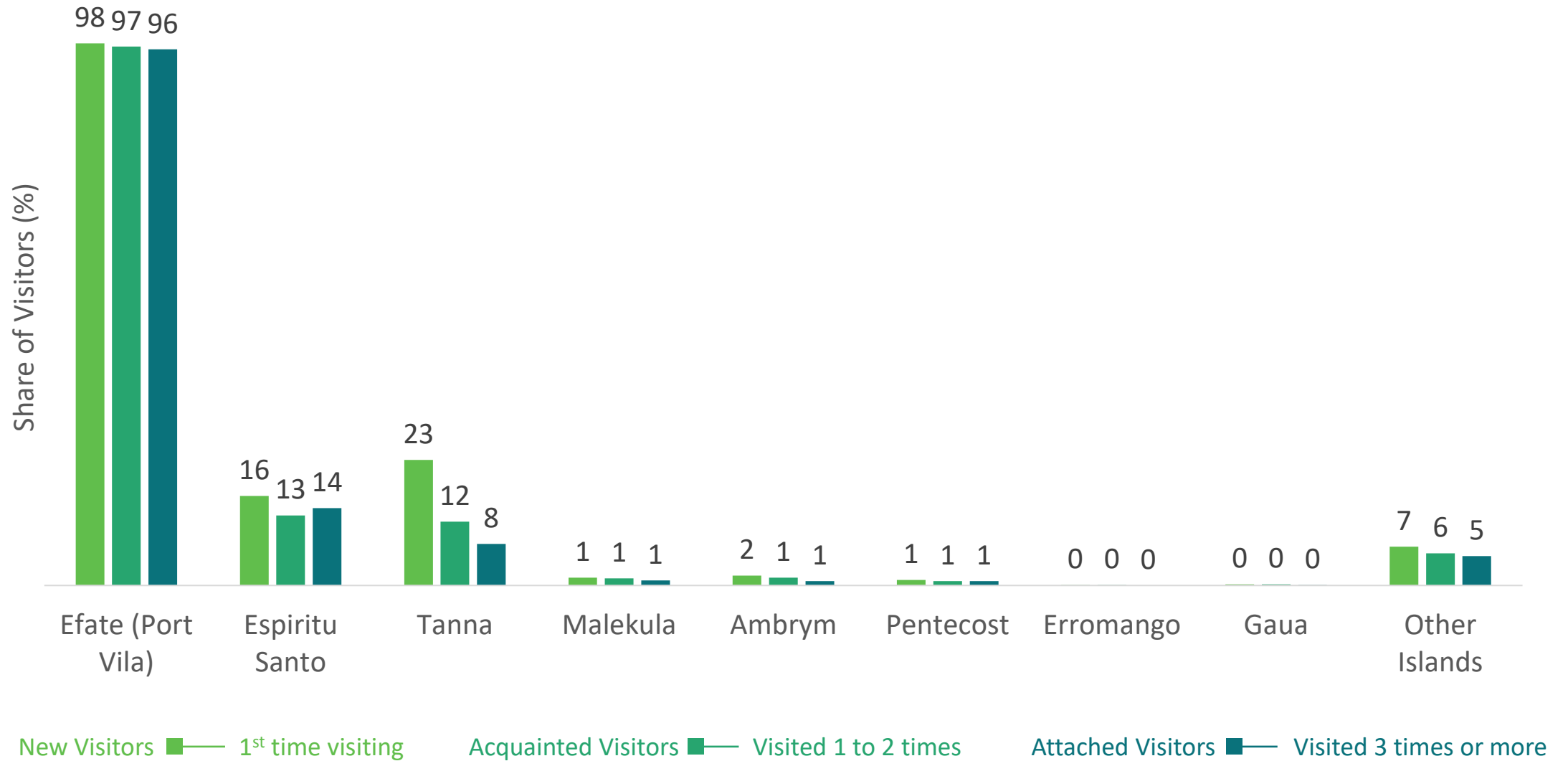
Prepay expenditure



In-country spend



Holiday visitors - Islands visited

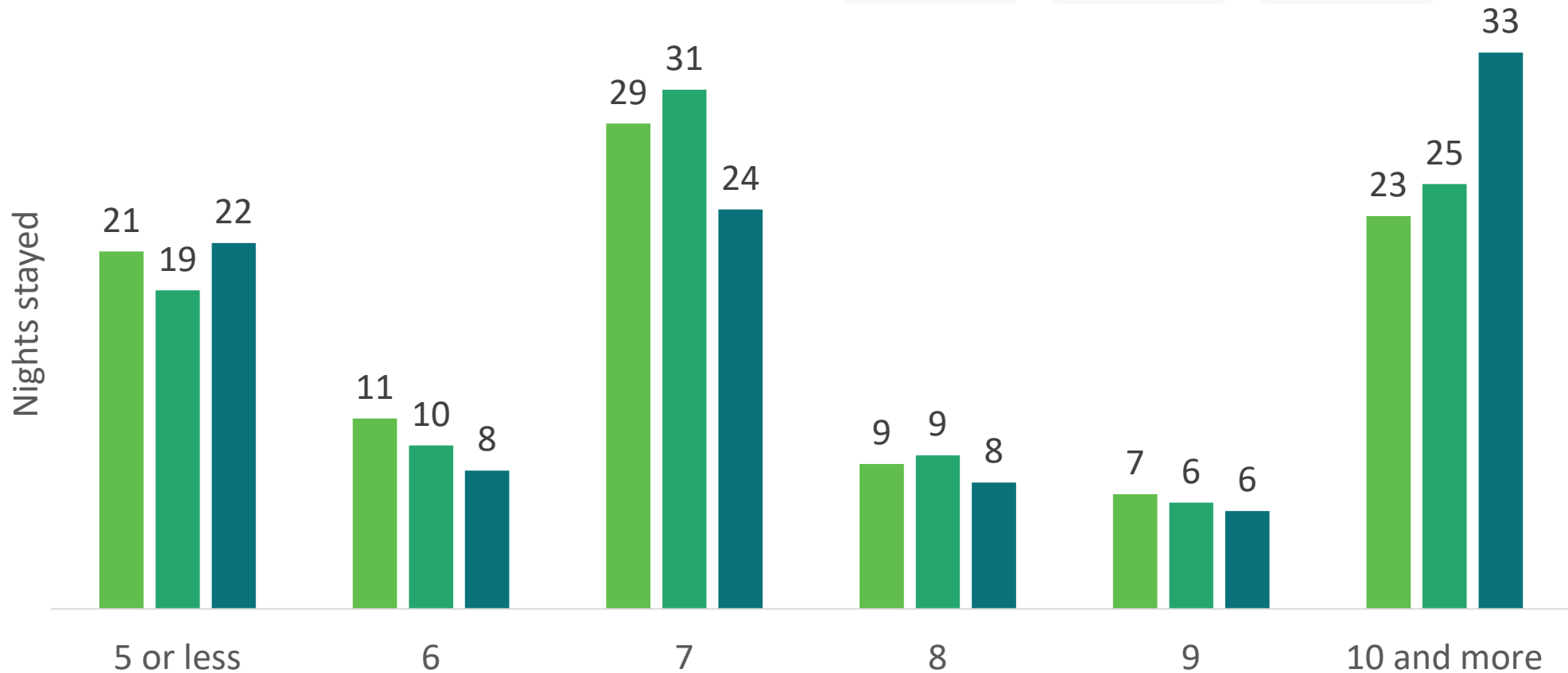


Holiday visitors - National length of stay

7.9
nights
New visitors



8.0
nights
Acquainted visitors

8.5
nights
Attached visitors

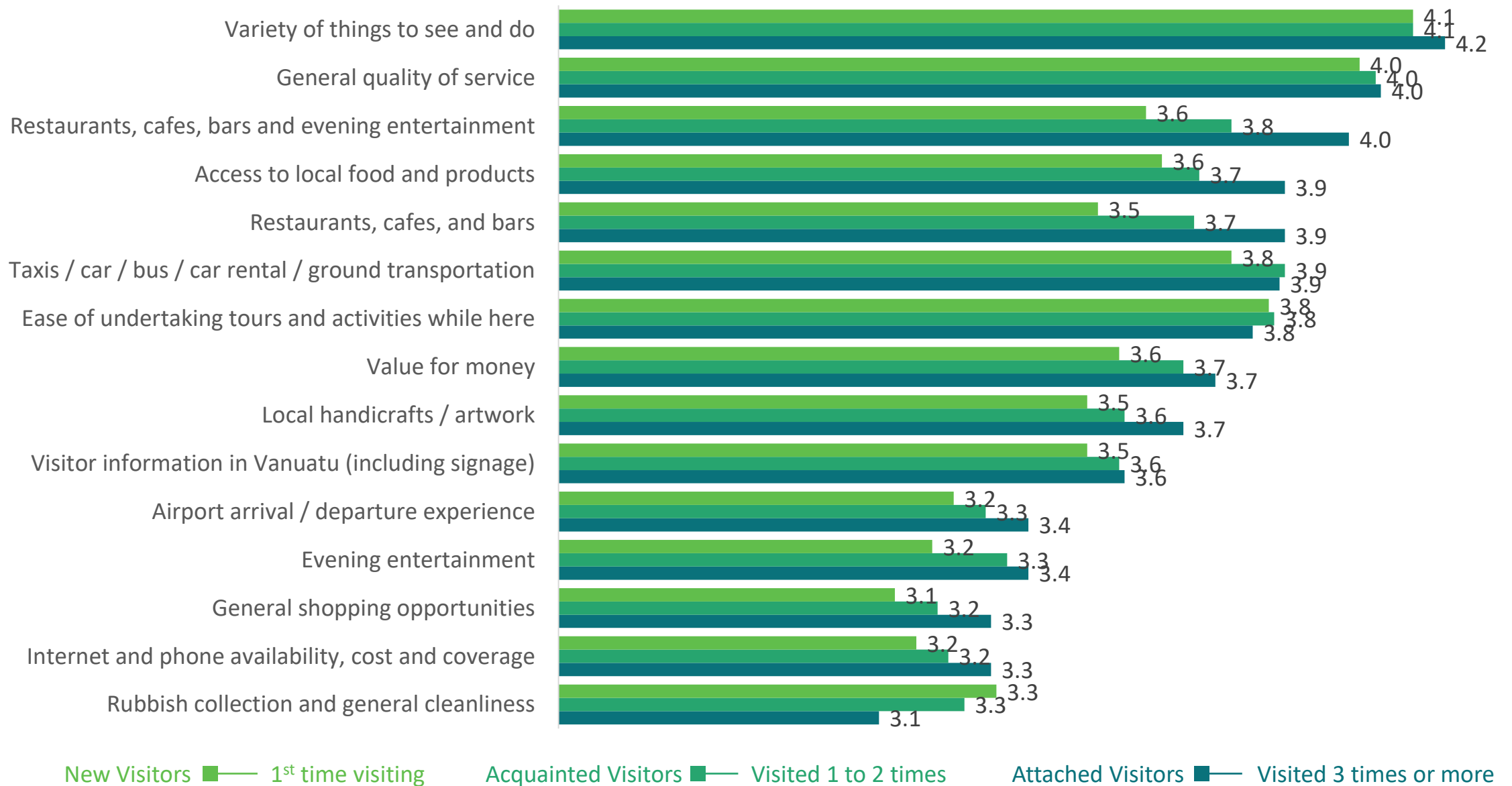


New Visitors ■ 1st time visiting Acquainted Visitors ■ Visited 1 to 2 times Attached Visitors ■ Visited 3 times or more

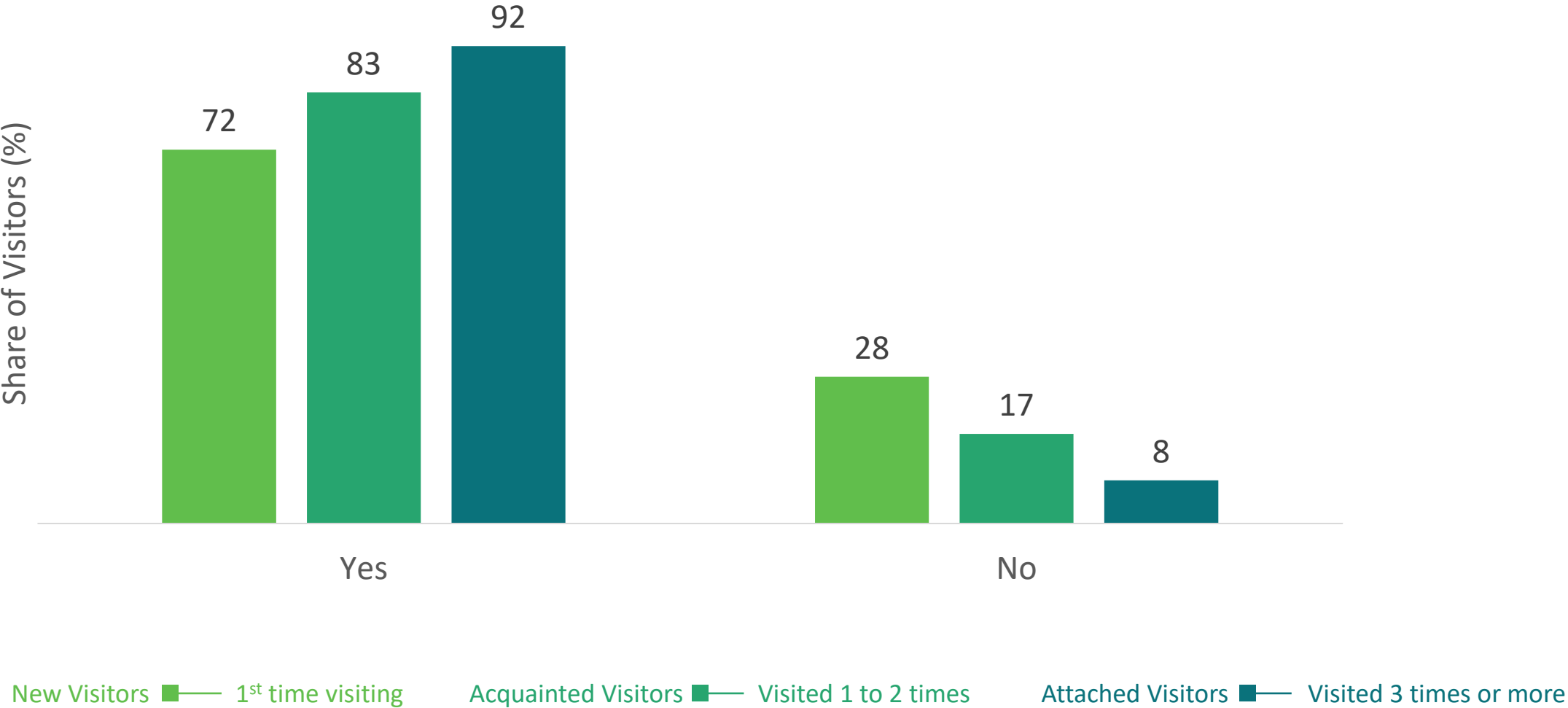
Holiday visitors - Spending

		Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
 Per Day	First-time	US \$99 Vt \$10,805		US \$87 Vt \$9,486		US \$186 Vt \$20,291
	1-2 times	US \$100 Vt \$10,947		US \$89 Vt \$9,786		US \$189 Vt \$20,733
	3 times or more	US \$87 Vt \$9,522		US \$98 Vt \$10,776		US \$185 Vt \$20,289
 Whole Trip	First-time	US \$790 Vt \$86,544		US \$693 Vt \$75,985		US \$1,483 Vt \$162,529
	1-2 times	US \$788 Vt \$86,374		US \$704 Vt \$77,208		US \$1,495 Vt \$163,582
	3 times or more	US \$742 Vt \$81,317		US \$840 Vt \$92,025		US \$1,582 Vt \$173,342

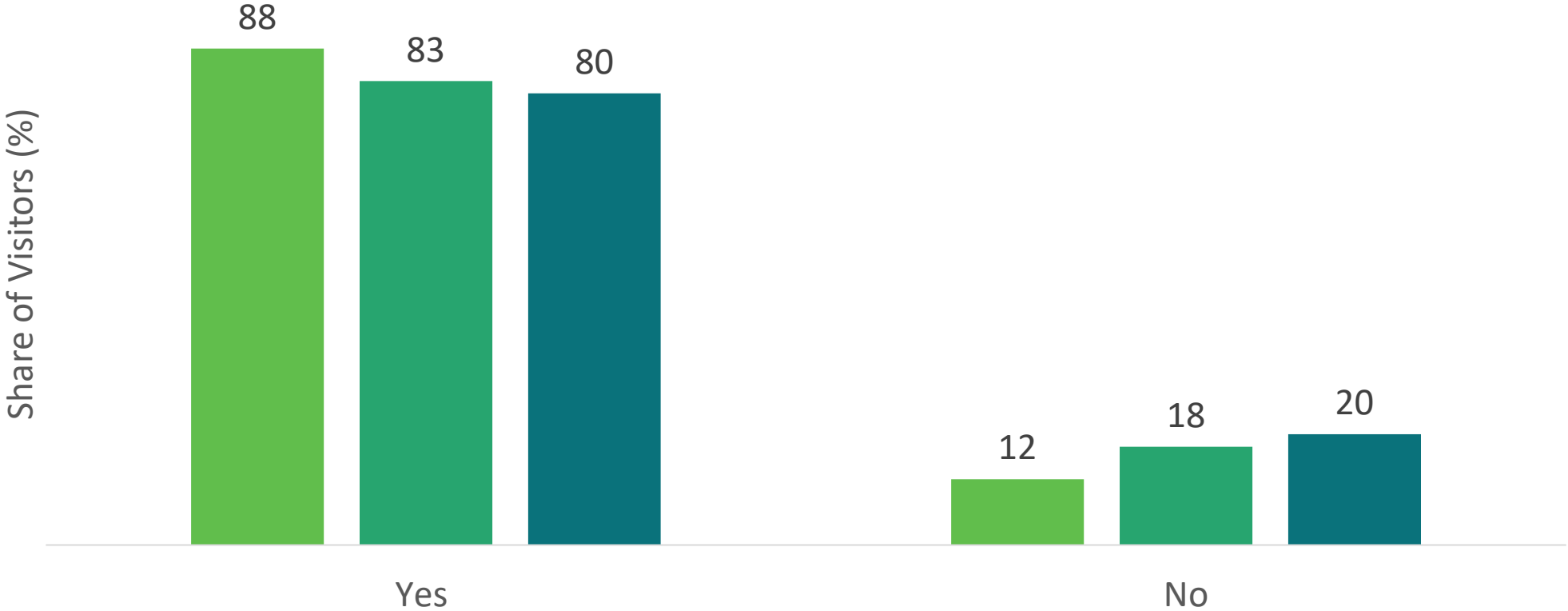
Holiday visitors-Satisfaction



Holiday visitors - Willingness to return

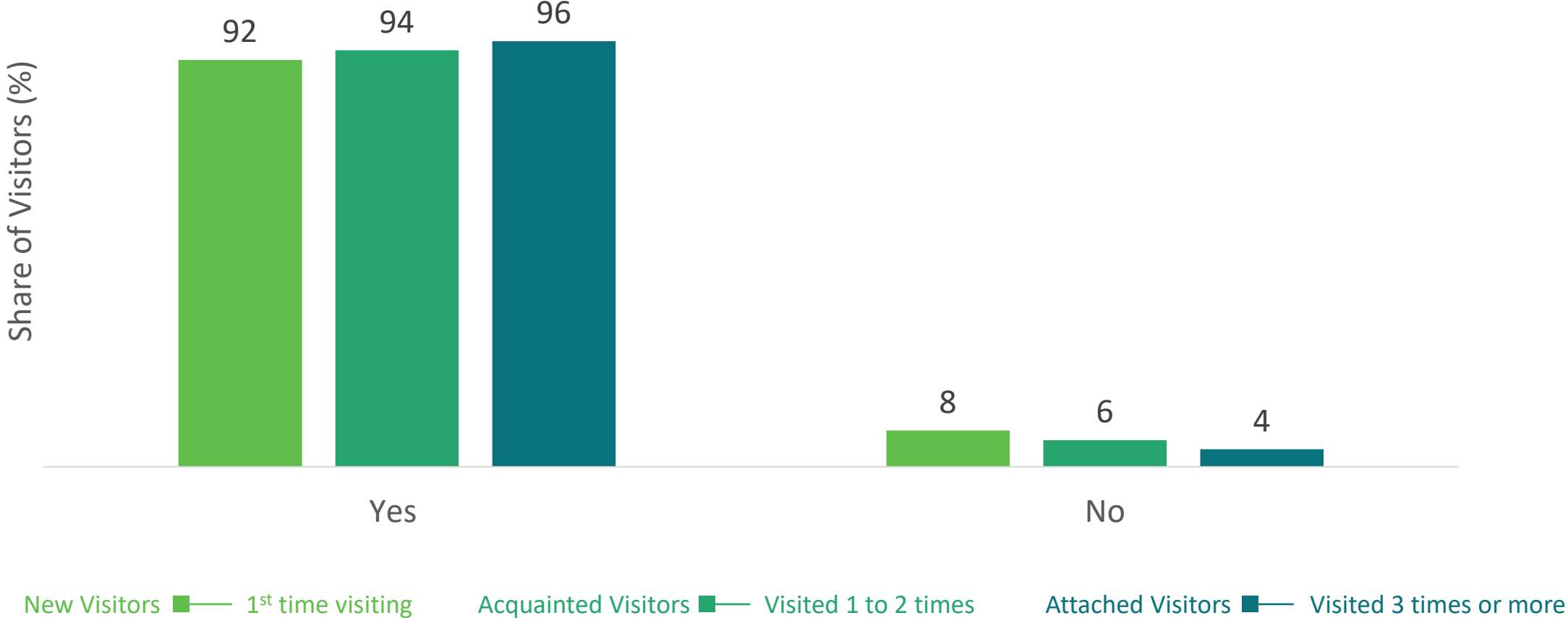


Holiday visitors - Willingness to visit outer islands in the future



New Visitors ■ 1st time visiting Acquainted Visitors ■ Visited 1 to 2 times Attached Visitors ■ Visited 3 times or more

Holiday visitors – Willingness to recommend Vanuatu



An aerial photograph of a tropical island. The island is covered in lush green vegetation, including palm trees and other tropical plants. Several small, rectangular huts with blue roofs are scattered across the island. The island is surrounded by a narrow strip of white sand beach, which meets the clear, turquoise water of the ocean. The water is very clear, showing the sandy bottom and some darker patches of coral or rocks. The overall scene is peaceful and idyllic.

Thank you

Team Leader: Simon Milne

Email: simon.milne@aut.ac.nz

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

Team member: Blake Bai, Mindy Sun

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