

# Vanuatu International Visitor Survey

## Training Workshop March 2019



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# Training Workshop Outline

- PTDI overview
- Vanuatu IVS review of key data set (Jan-Jun 2018)
- Datamining – the 70+ market
- Datamining – Outer Island dimensions
- Datamining – the mainland China market

Translating data into meaningful outcomes other examples.....

# Training Workshop Outline

- 1.10 – 2.30 IVS review/discuss key data sets
- 2.30 – 3.00 Working Group discussions & presentations
- 3.00 – 3.20 (approx.) Afternoon tea
- 3.20 – 3.40 Working group presentations
- 3.50 – 4.40 Review/discuss data mining
- 4.40 – 5.00 Wrap up and evaluation

# The Pacific Tourism Data Initiative: Supporting Evidence Based Planning and Development



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# RTS 2015 – 2019: VISION

Tourism Ministers' Vision for Tourism:

*‘Tourism will inspire sustainable economic growth and empower the Pacific people’*

South Pacific Tourism Organisation

**How do we measure progress towards Tourism SD goals?**

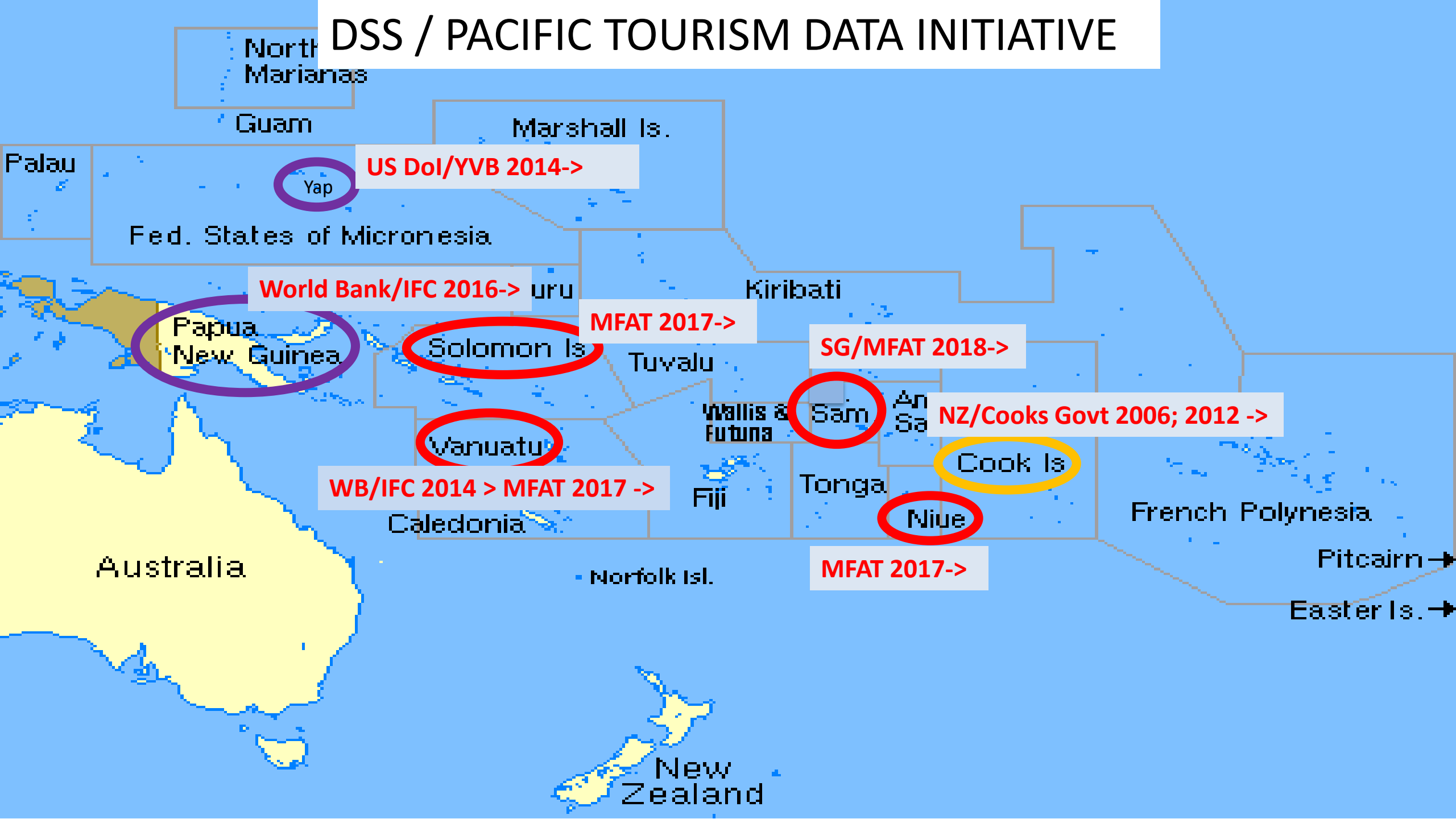
**How do we justify and target spend on marketing and product development?**

**How do we enable and sustain cost effective research to inform evidence based strategy development?**

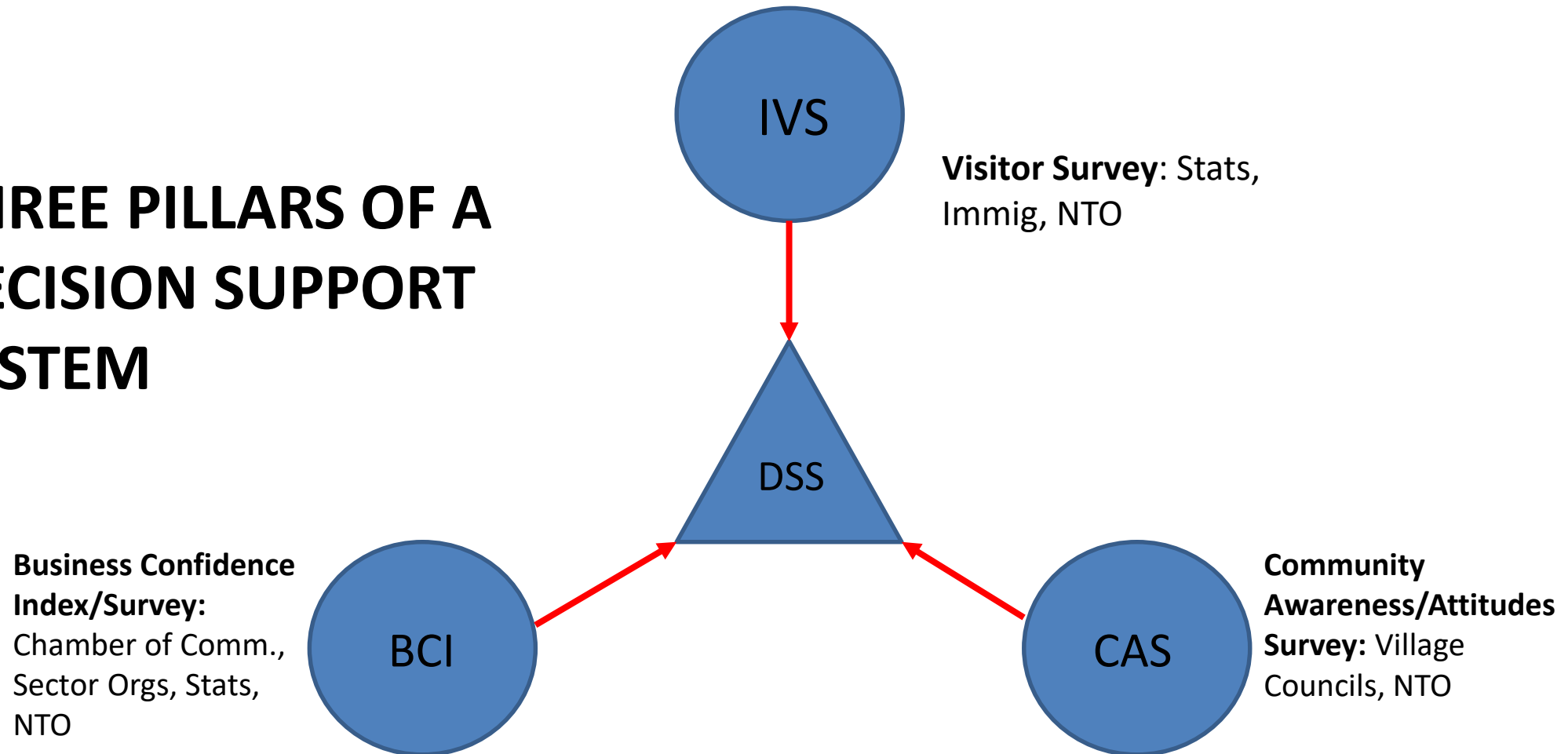
**How can we make meaningful regional comparisons?**



# DSS / PACIFIC TOURISM DATA INITIATIVE



# THREE PILLARS OF A DECISION SUPPORT SYSTEM



Dissemination, Awareness, Motivation, Capacity Building, Collaboration



# Supporting decision making in:

1. Destination marketing
2. Product/experience development
3. Investment prioritization and guidance
4. Broader Planning and Strategy for Sustainable Development
5. Outer Island development
6. Research and insight

# Supporting decision making in:

## 1. Destination marketing

- What are the top five insights you have gained?
- What challenges face you in reaching the Australian market?
- What challenges face you in reaching the Chinese market?
- What marketing platforms work best and for whom?
- Could yield be the focus for marketing (RoI rather than CoA)?



# Supporting decision making in:

## 2. Product/experience development

- What are the top five insights you have gained?
- What products perform well and what are the weak links in the chain?
- Where does the potential for product development lie? (including HR/training)
- How do product development needs differ for long and short haul markets?
- Should product development be guided by yield?

# Supporting decision making in:

## 3. Investment prioritization and guidance

- What are the top five insights you have gained?
- Where does new investment need to be encouraged?
- What data will the investor place most value on?
- What advice would you give a small local investor wanting to develop a small village based cultural experience?

# Supporting decision making in:

## 4. Broader Planning and Strategy for Sustainable Development

- What are the top five insights you have gained?
- What are the key areas that need to be developed to enhance visitor satisfaction?
- What indicators can be developed from the IVS data
- Are there challenges in balancing cruise and air based markets?

# Supporting decision making in:

## 5. Outer Island development

- What are the top five insights you have gained?
- What challenges are stopping visitors from engaging in more outer island tourism?
- What opportunities are there to grow visitor yield and satisfaction?
- Which markets and types of visitors are best suited to outer island experiences?
- What advice would you provide a local person looking to set up a cultural experience/accommodation?



# Supporting decision making in:

## 6. Research and insight

- What are the top five insights you have gained?
- How can we grow IVS response rates? Any new ideas?
- What areas of data mining should we be developing further?
- Are there opportunities for additional survey development?

# REGIONAL TRAINING PROGRAM APPROACH

## Phase One:

What is an IVS

Survey design – online platforms

Survey analysis – SPSS

Data dissemination

## Phase Two:

Using the PTDI data

Government and policy makers

Private sector/SME

Outer Islands

# Vanuatu International Visitor Survey

## January - June 2018





# Vanuatu International Visitor Survey

## 2017 Annual Report: Outer Island insights



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# Presentation Structure



# Respondents (Jan – Jun 2018)

Total number of valid e-mails sent: **20,588**



Conversion  
rate of  
**11.7%**

Total number of responses: **2,417**



**4.6%** of all  
visitors during  
the period

Expenditure Responses cover a total of  
**3,186 adults** and **525 children**



**7.1%** of all  
visitors during  
the period

# Total IVS Respondents (Jan 2015 – Jun 2018)



Respondents  
to Date  
**17,495**



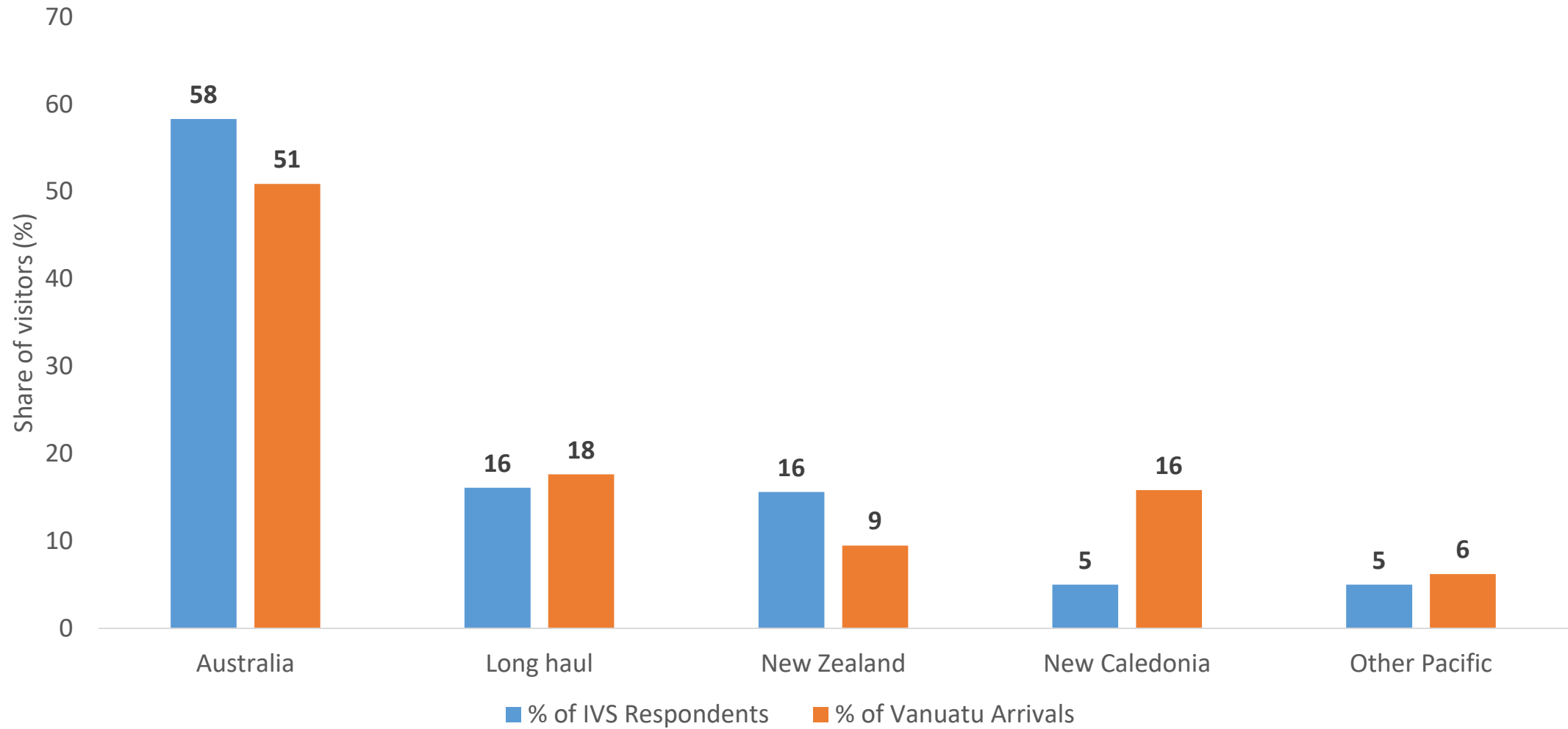
Total people  
included in  
expenditure sections  
**34,080**

# MAIN CHALLENGES

- Timely delivery of email addresses
- Continuing to increase response rates
- Developing further survey versions
- Enhancing dissemination of findings and uptake of insights



# Country of Origin and Weighting



# Presentation Structure



# Visitor Characteristics - IVS Respondent Data



## Household Income

- 38% Under \$50,000
- 33% \$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

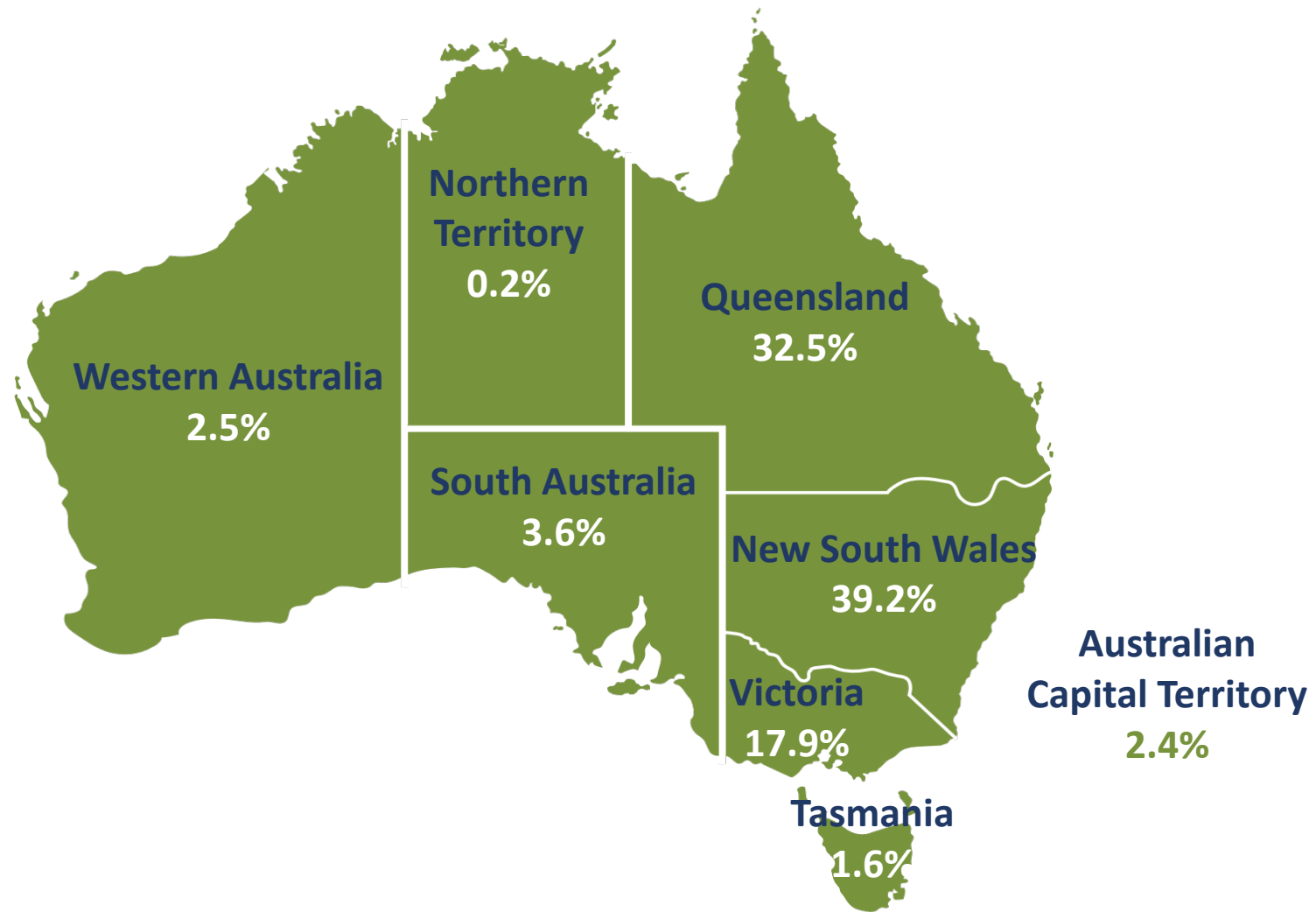
- 58% Australia
- 16% Long Haul
- 16% New Zealand
- 5% New Caledonia
- 5% Other Pacific

## Gender



Females

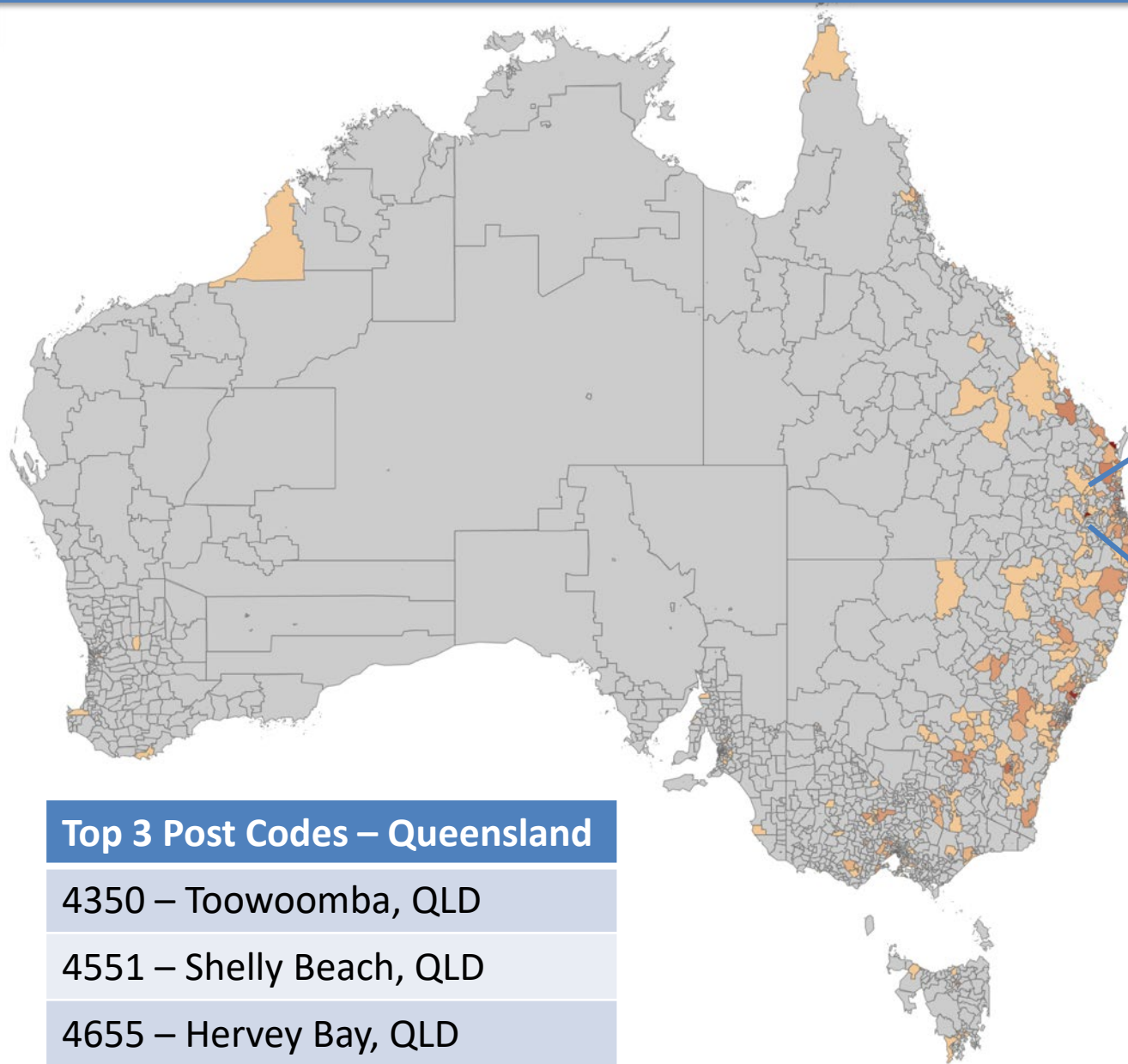
# Australian Respondents - IVS Respondent Data



New South Wales, Queensland and Victoria make up **89.6%** of all Australian visitor arrivals



# Heat Maps for Australia (January-June 2018)

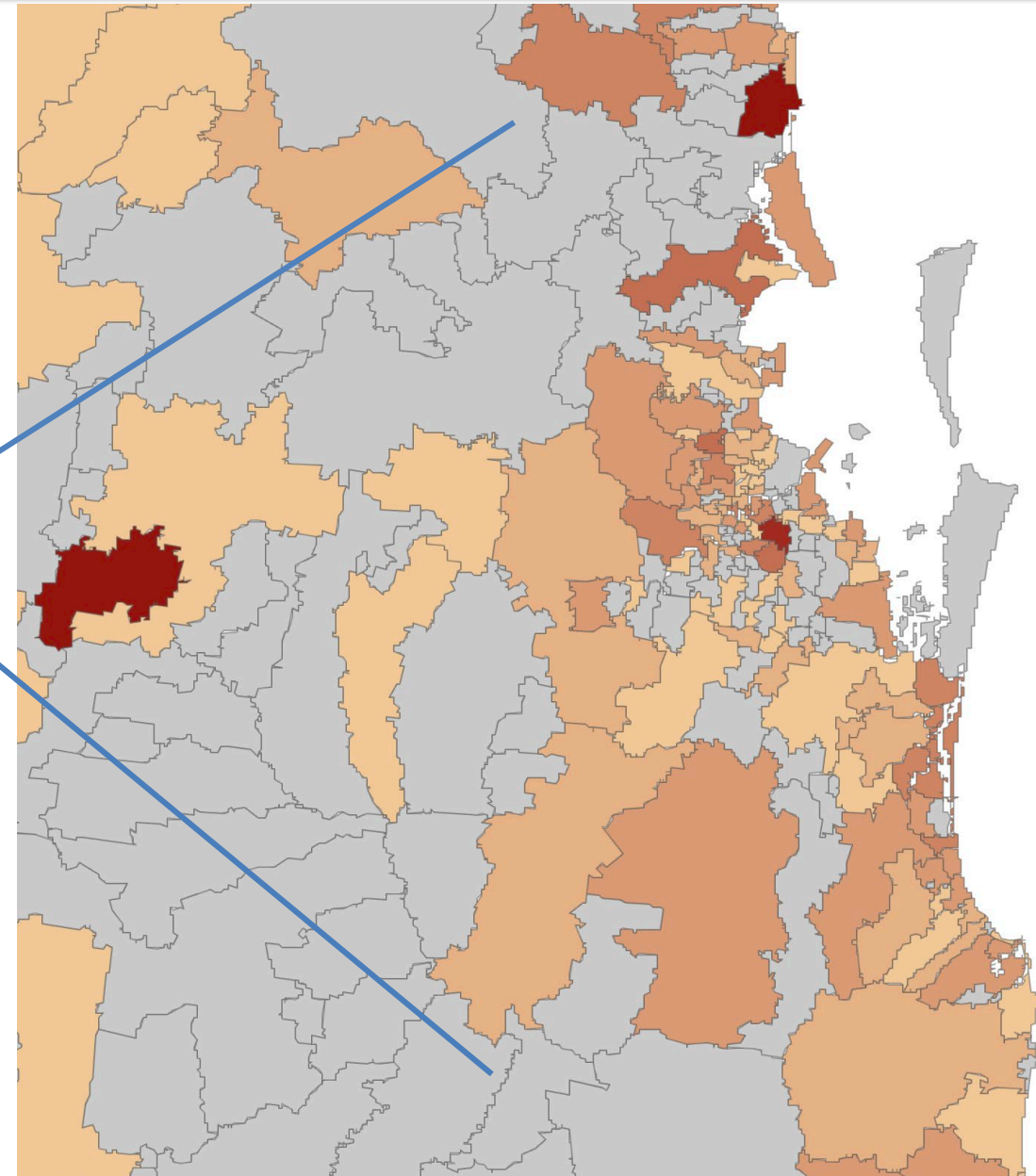


## Top 3 Post Codes – Queensland

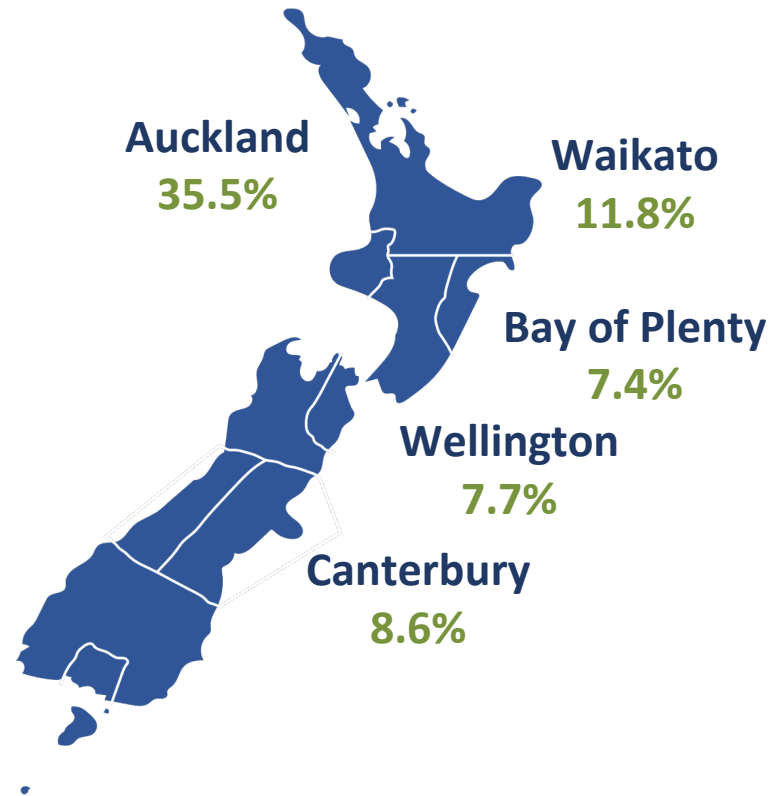
4350 – Toowoomba, QLD

4551 – Shelly Beach, QLD

4655 – Hervey Bay, QLD



# New Zealand Respondents - IVS Respondent Data

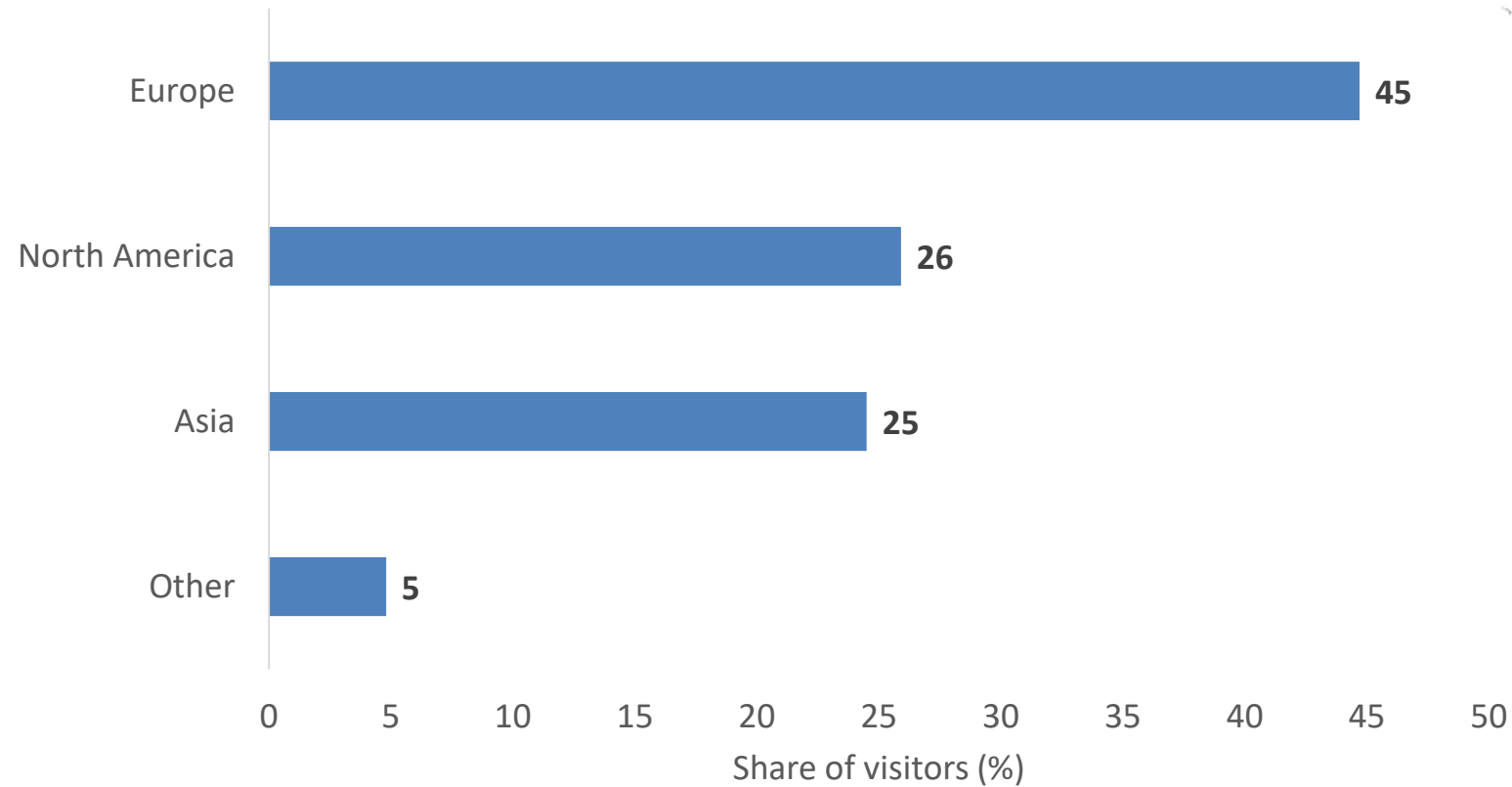


Auckland, Waikato, Canterbury, Wellington, Bay of Plenty, make up **71%** of all New Zealand visitor arrivals

# Long Haul Market- Region Breakdown

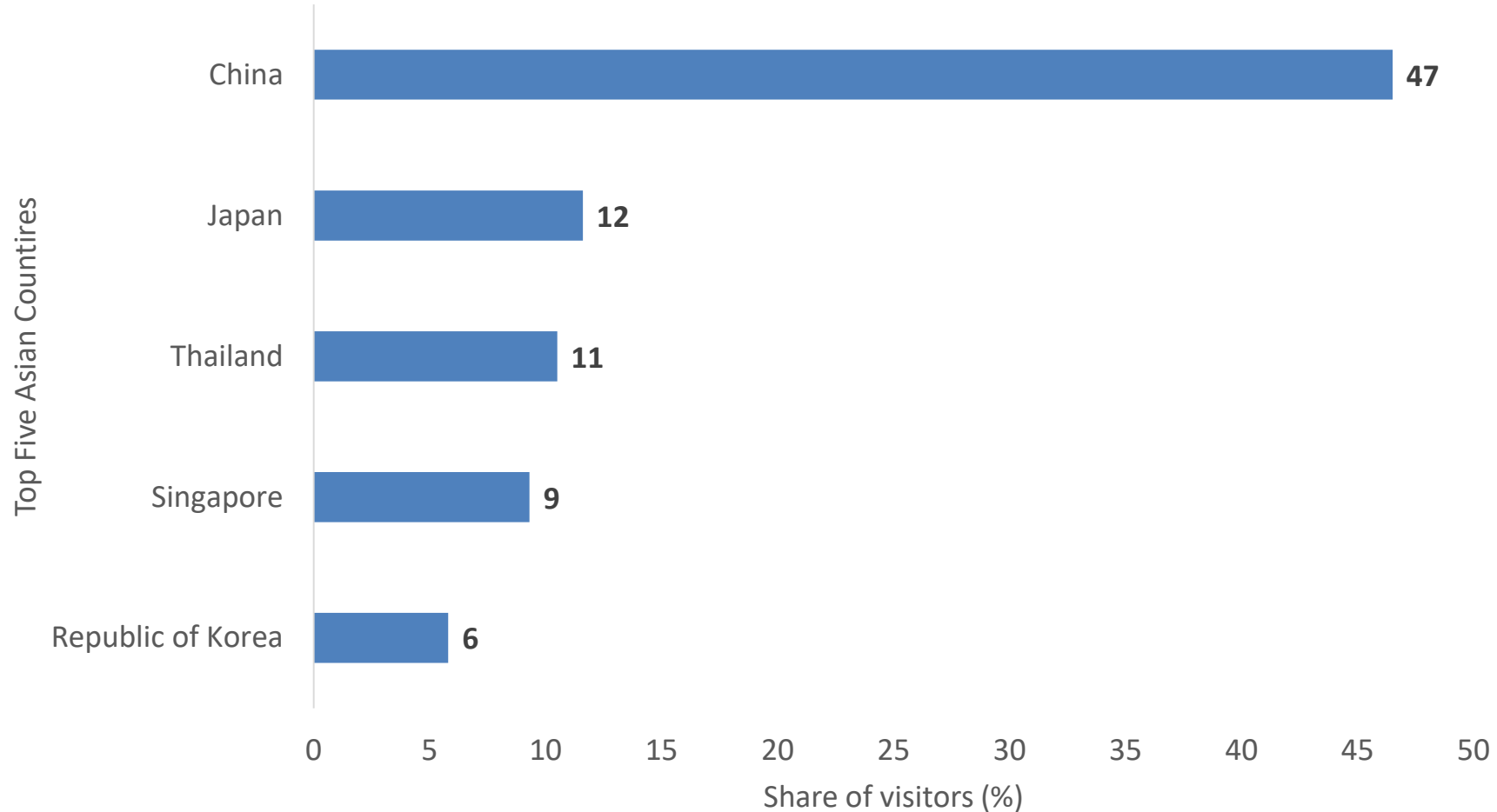
## Long Haul – Region Breakdown

16% of IVS respondents

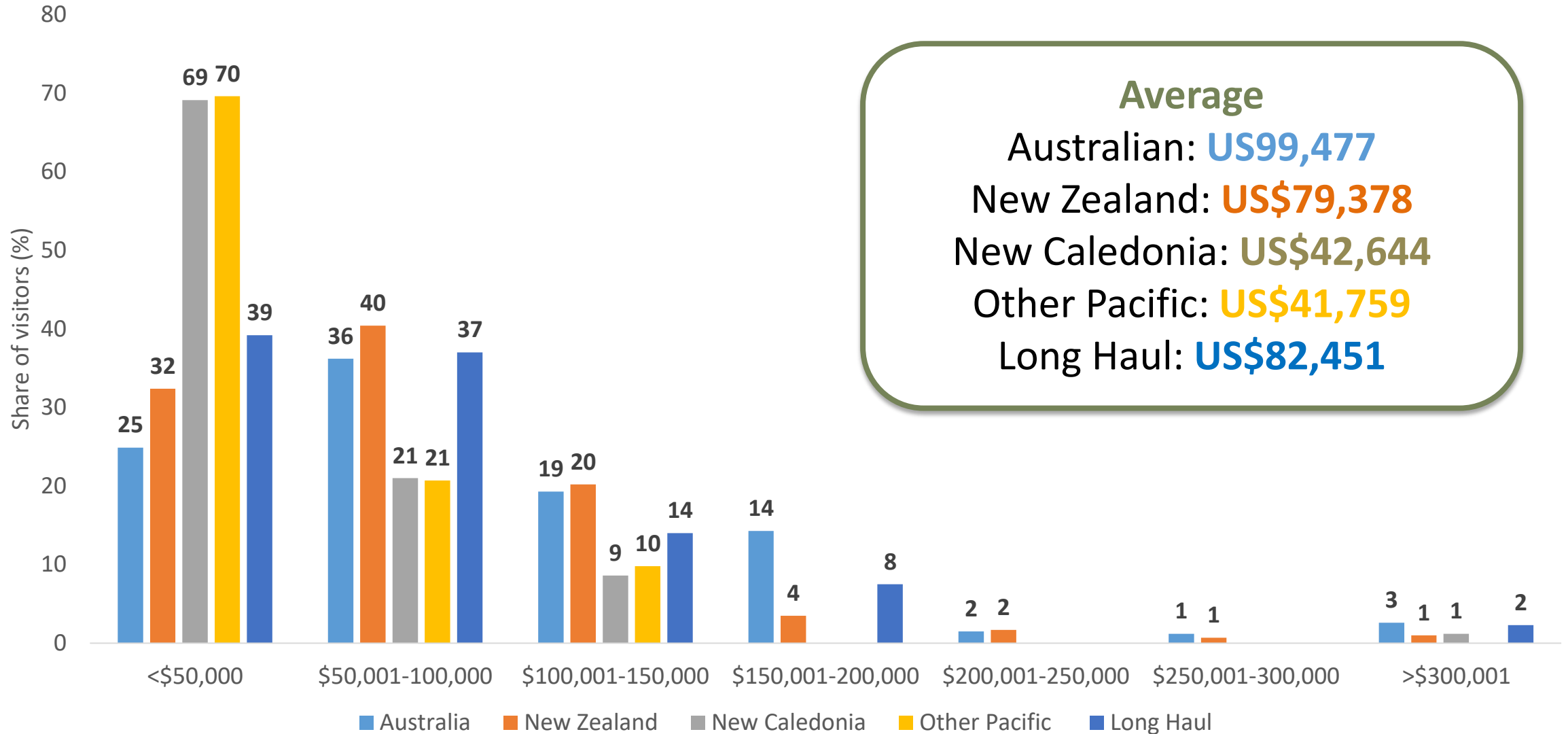


# Long Haul Market – Top Countries

## Asia



# Annual Household Income



# Visitor Characteristics – Summary



## Airlines Used

**55%** Air Vanuatu  
**23%** Virgin Australia  
**11%** Aircalin  
**11%** Qantas (code share)  
**8%** Fiji Airlines



## Length of Stay

**7.9** Nights  
**64%** Stayed up to 1 week



## Previous Visits

**54%** First trip  
**23%** 1 or 2 times



## Travel Companions

**21%** Travel by themselves  
**79%** Travel with others



## Purpose of Visit

**72%** Holiday  
**9%** Business/Conference  
**8%** Visiting Friends/Family

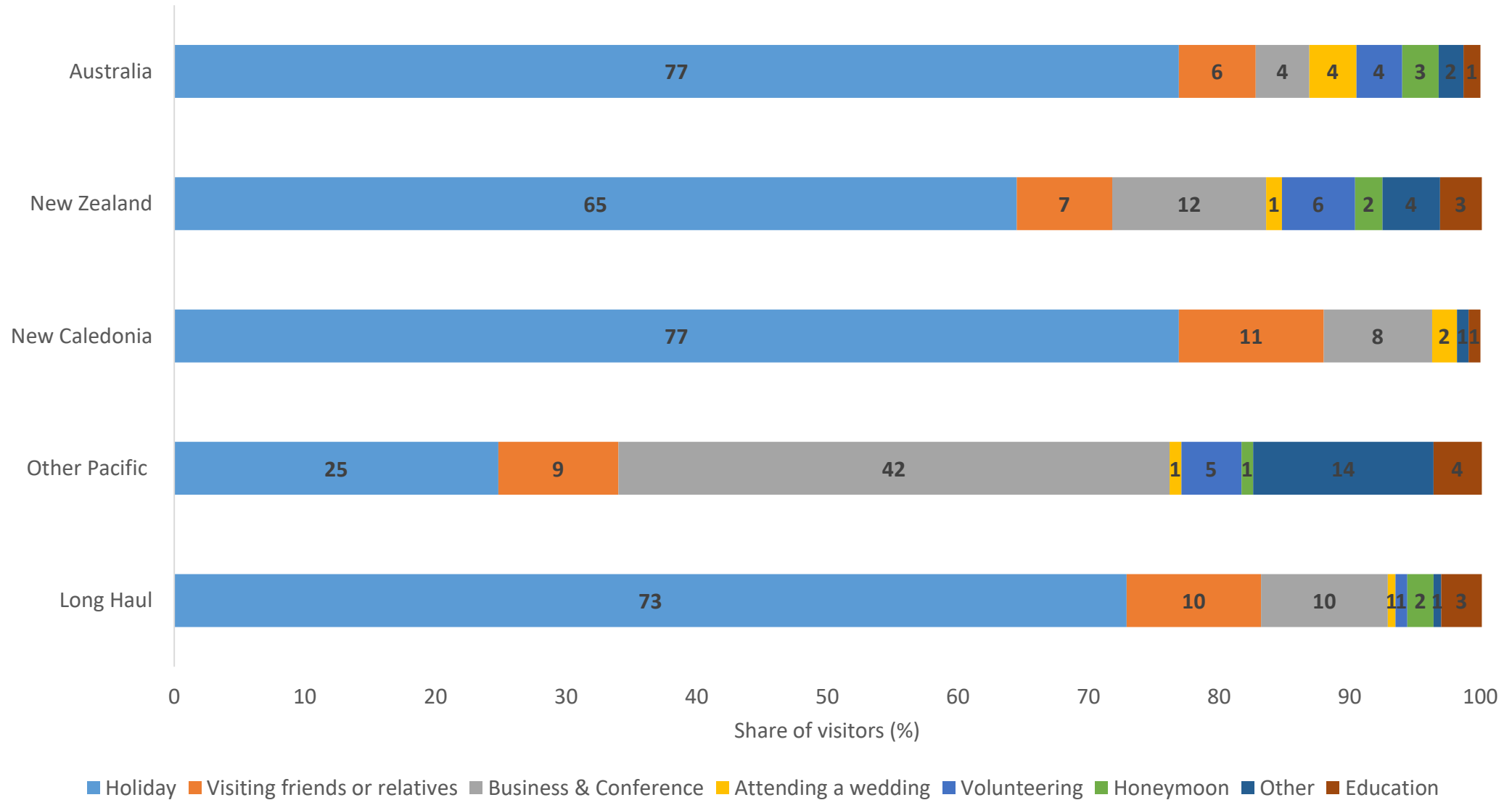


## Islands Visited on Trip

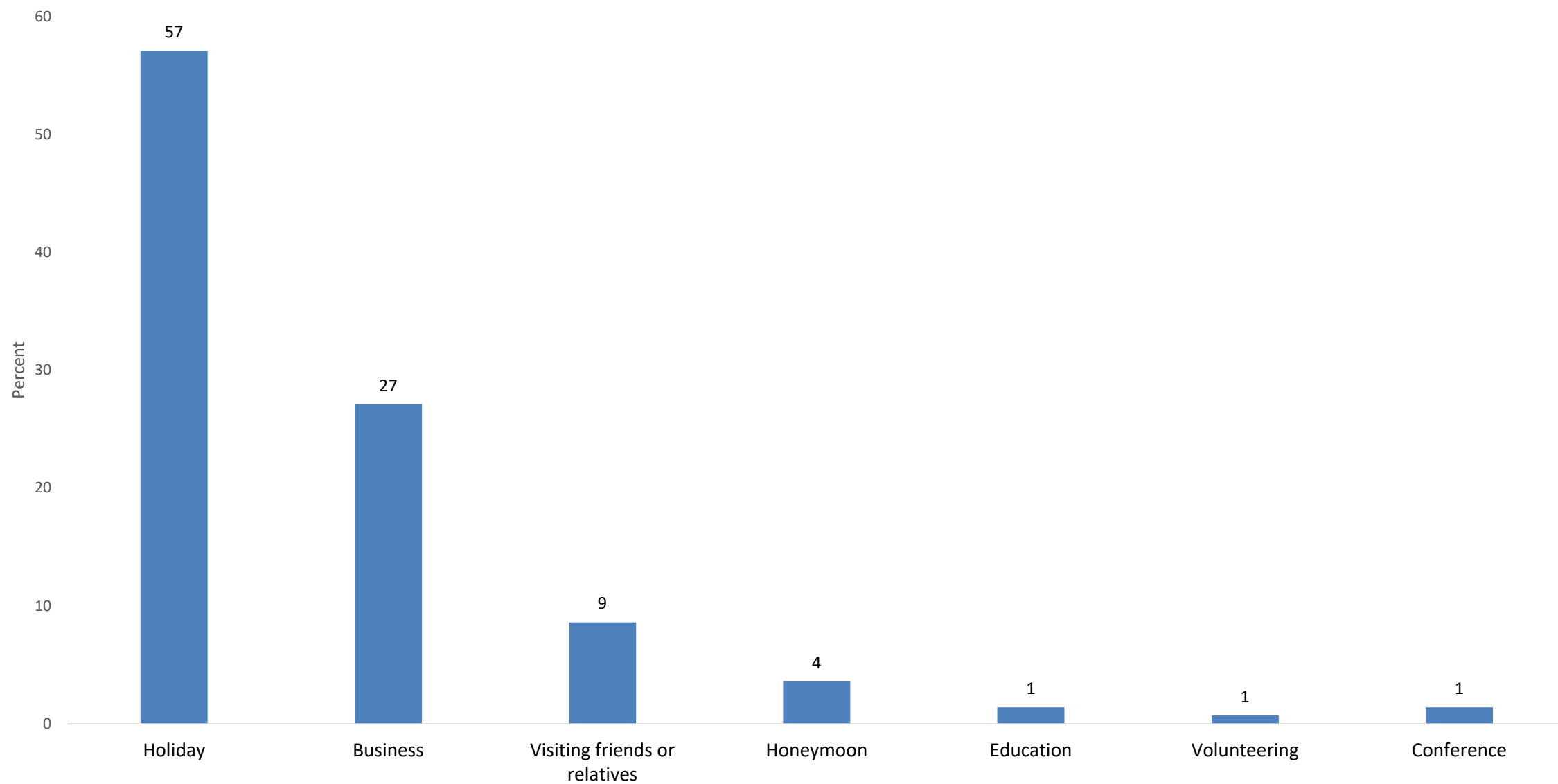
**96%** Efate (Port Vila)  
**17%** Tanna  
**16%** Espiritu Santo



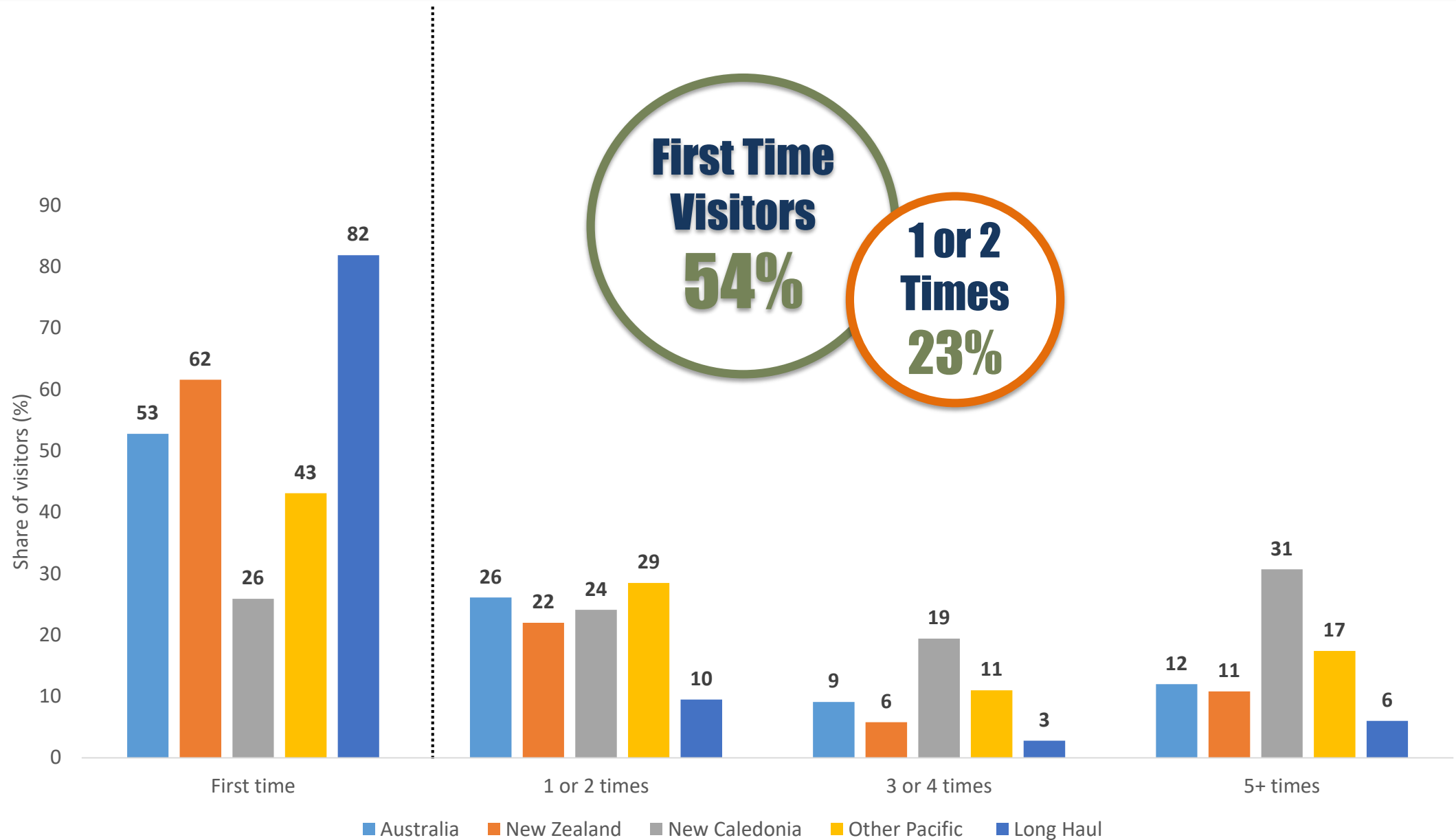
# Main Purpose of Visit



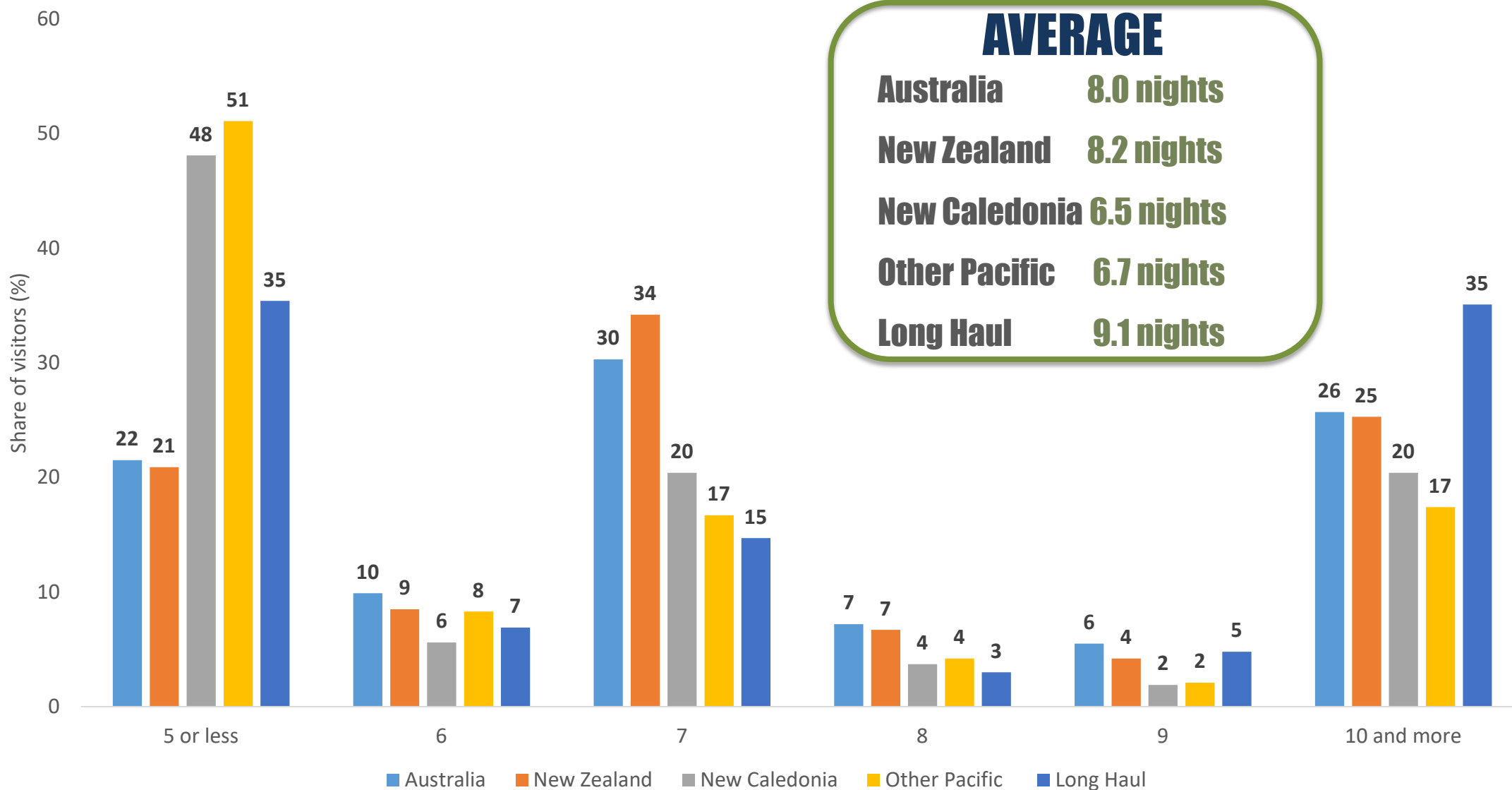
# Purpose of visit (mainland Chinese visitors): Jan 2015- Dec 2017



# Previous Visits

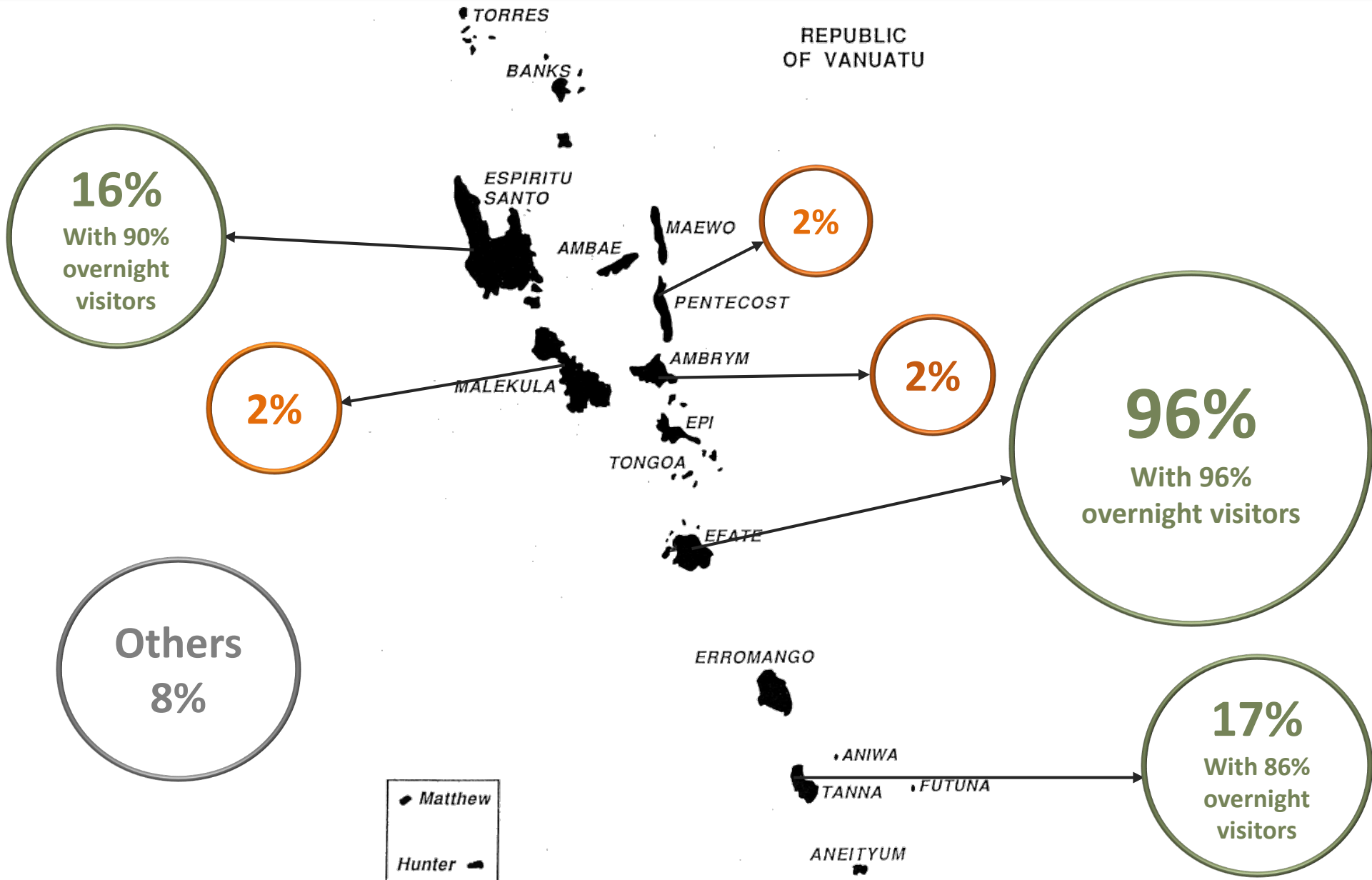


# Length of Stay (nights)

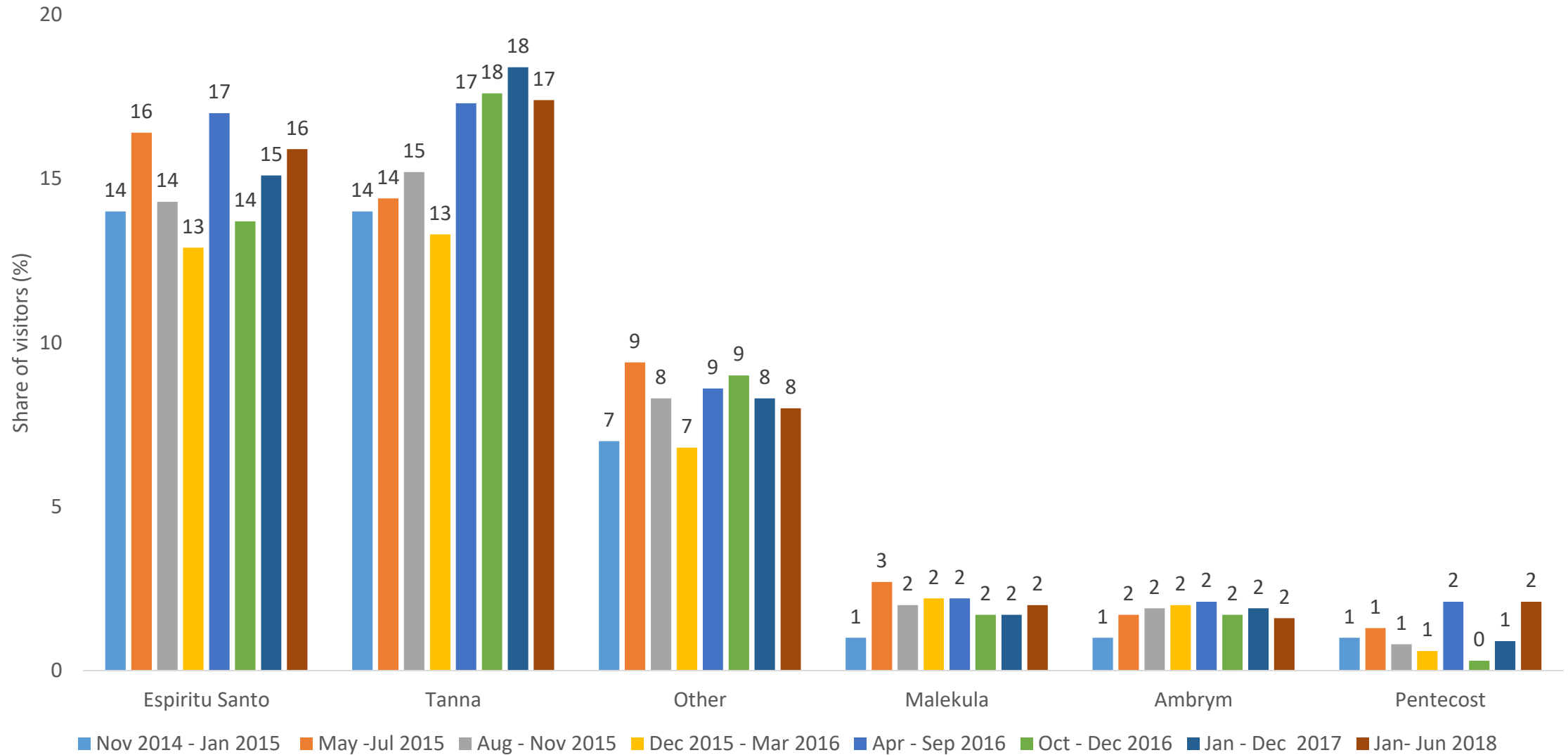


Note: 31+ days as outliers were removed for length of stay analysis

# Islands Visited

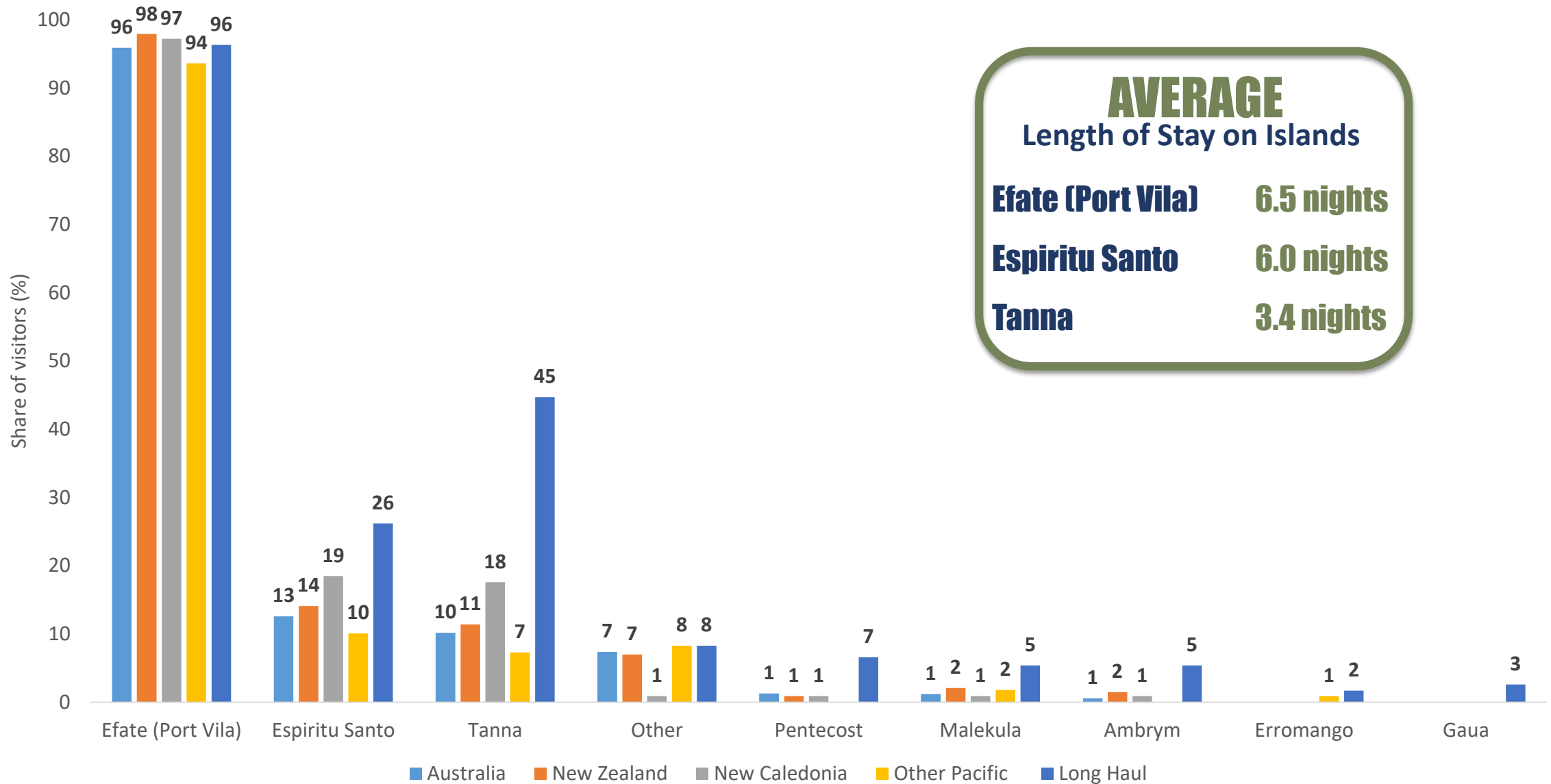


# Islands Visited – Time Series





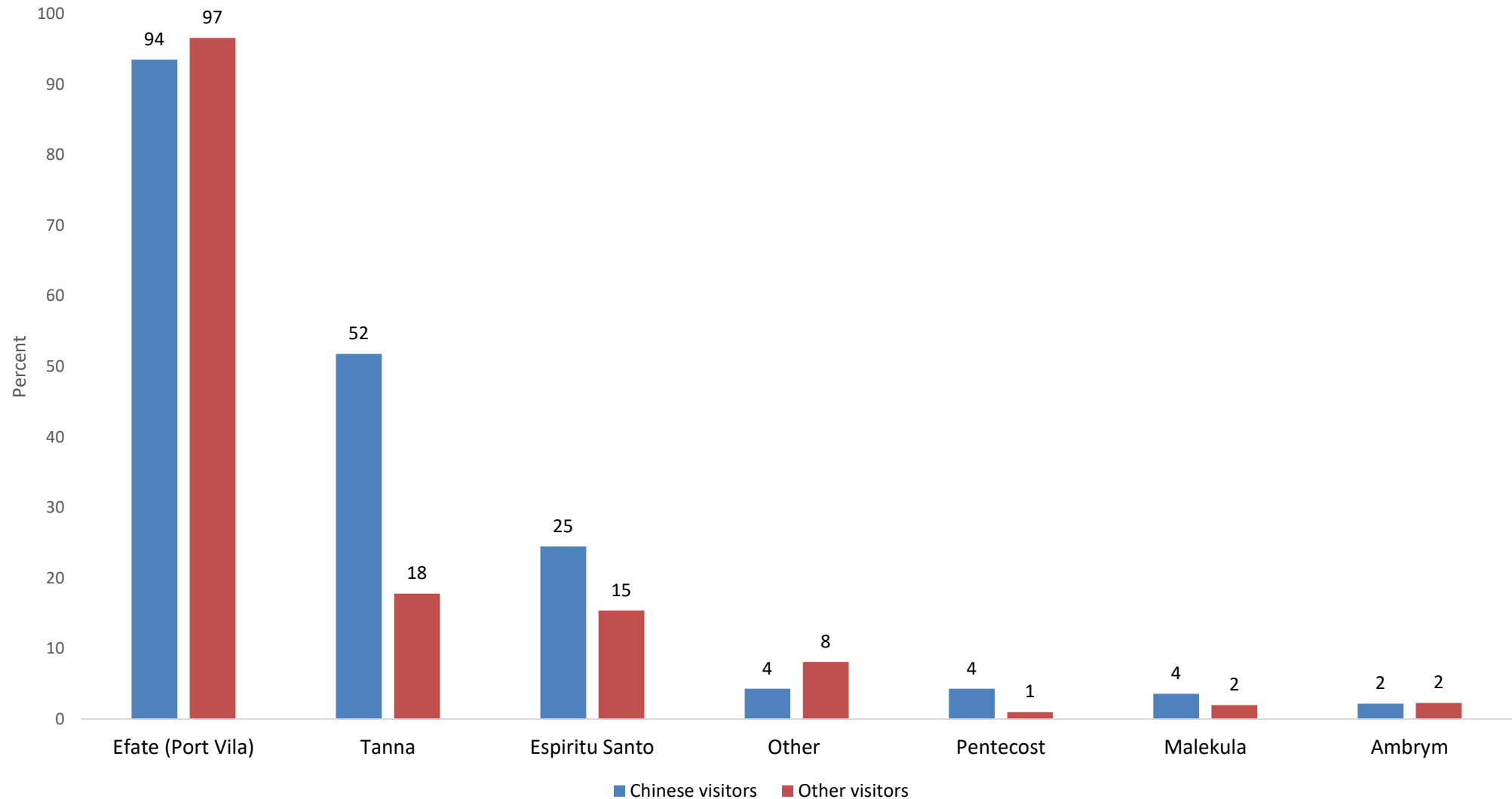
# Outer Islands Visited – Country of Origin



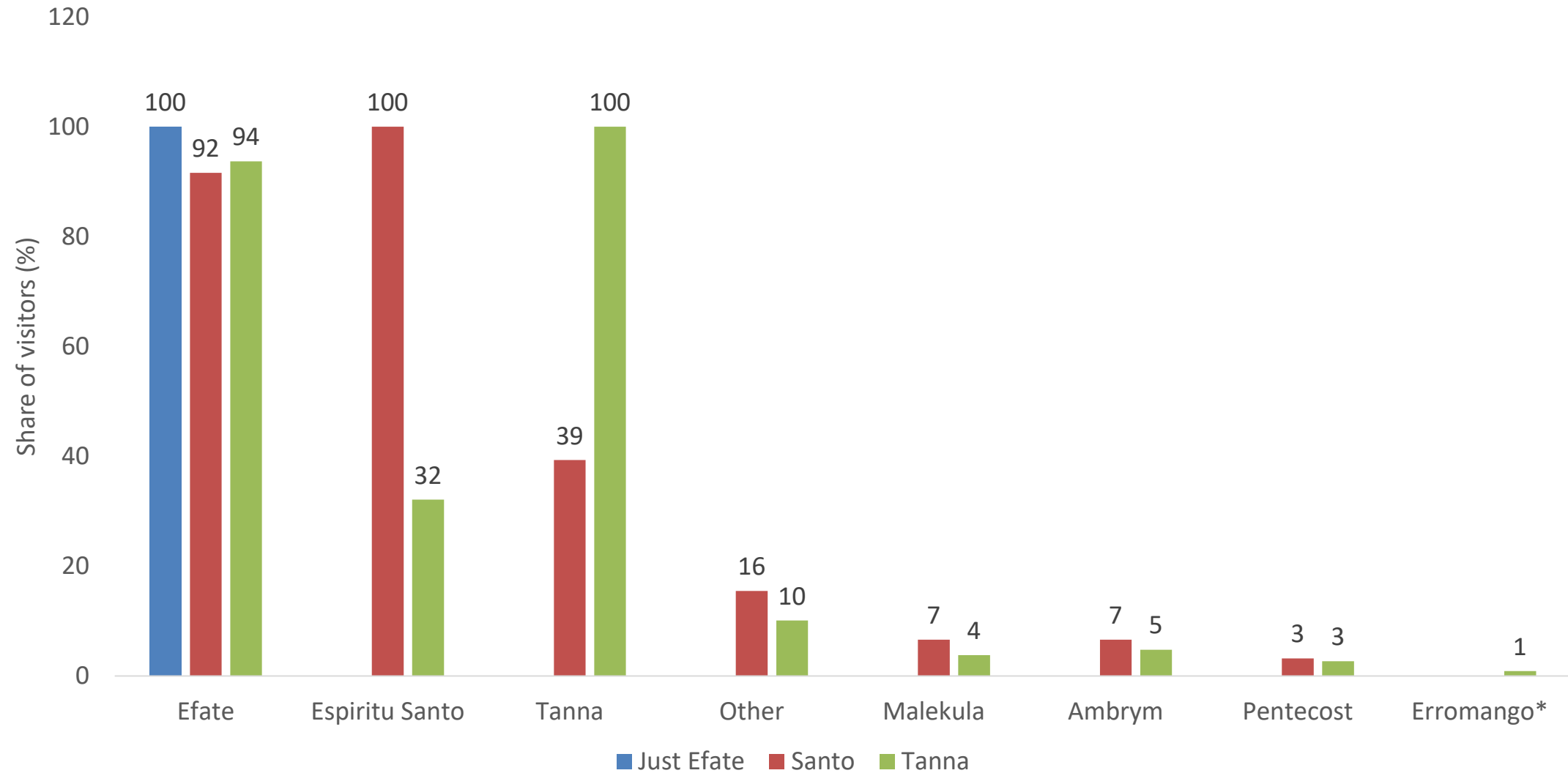
Note: Multiple responses, therefore total does not add up to 100%

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

# Mainland China market: Outer Islands visited: Jan 2015-Dec 2017



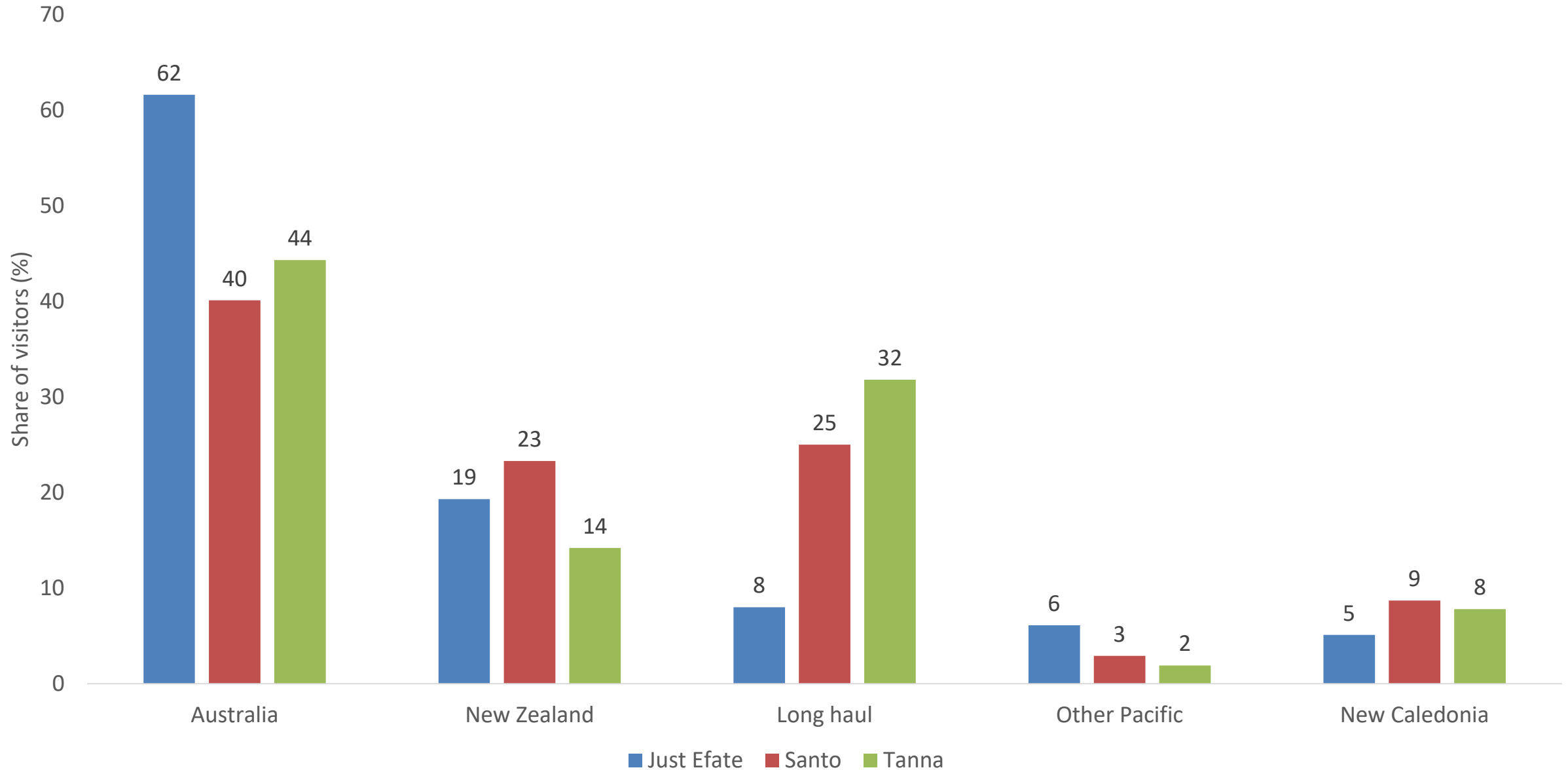
# Islands Visited (2017)



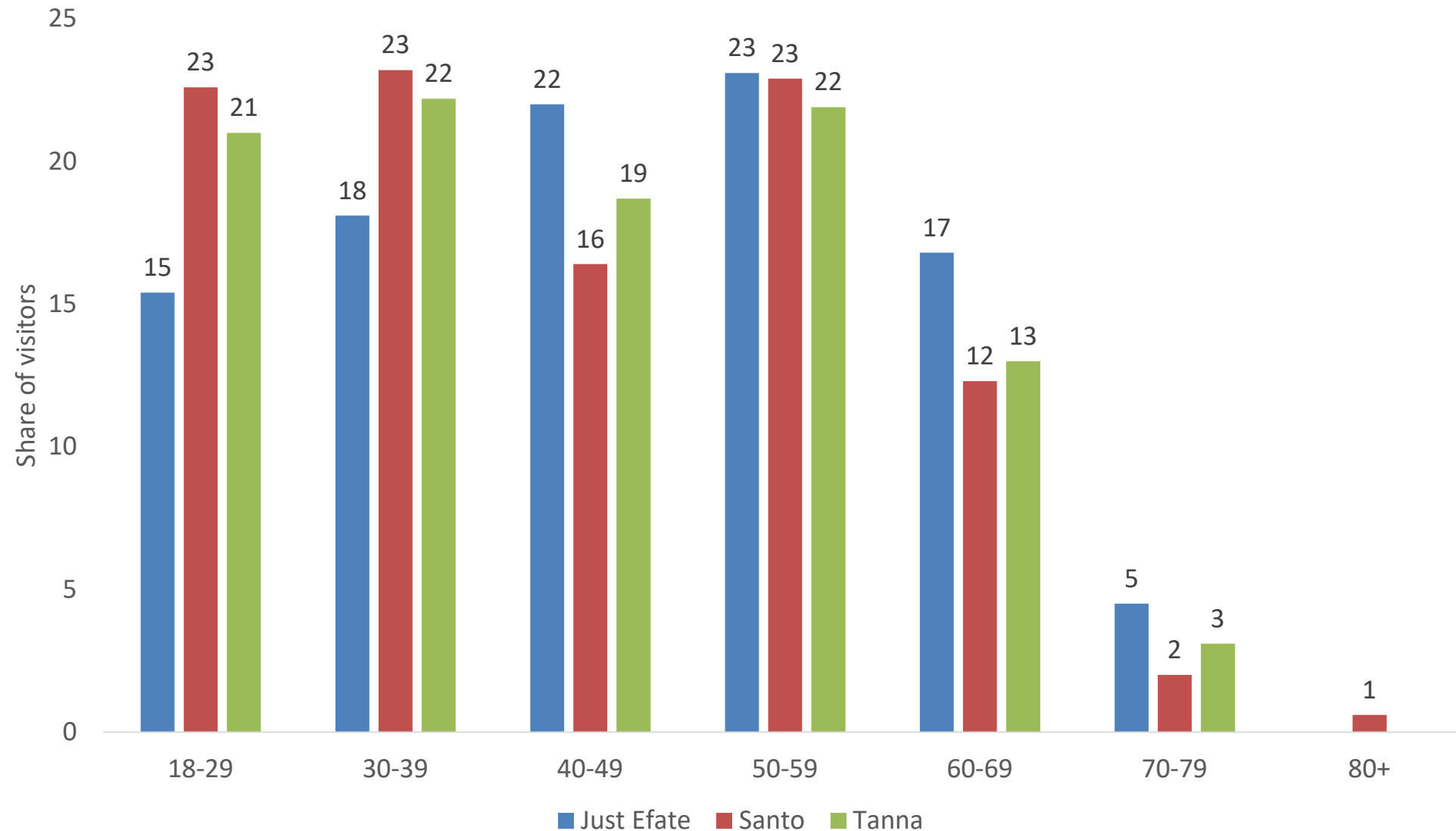
Note: \*n<10

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

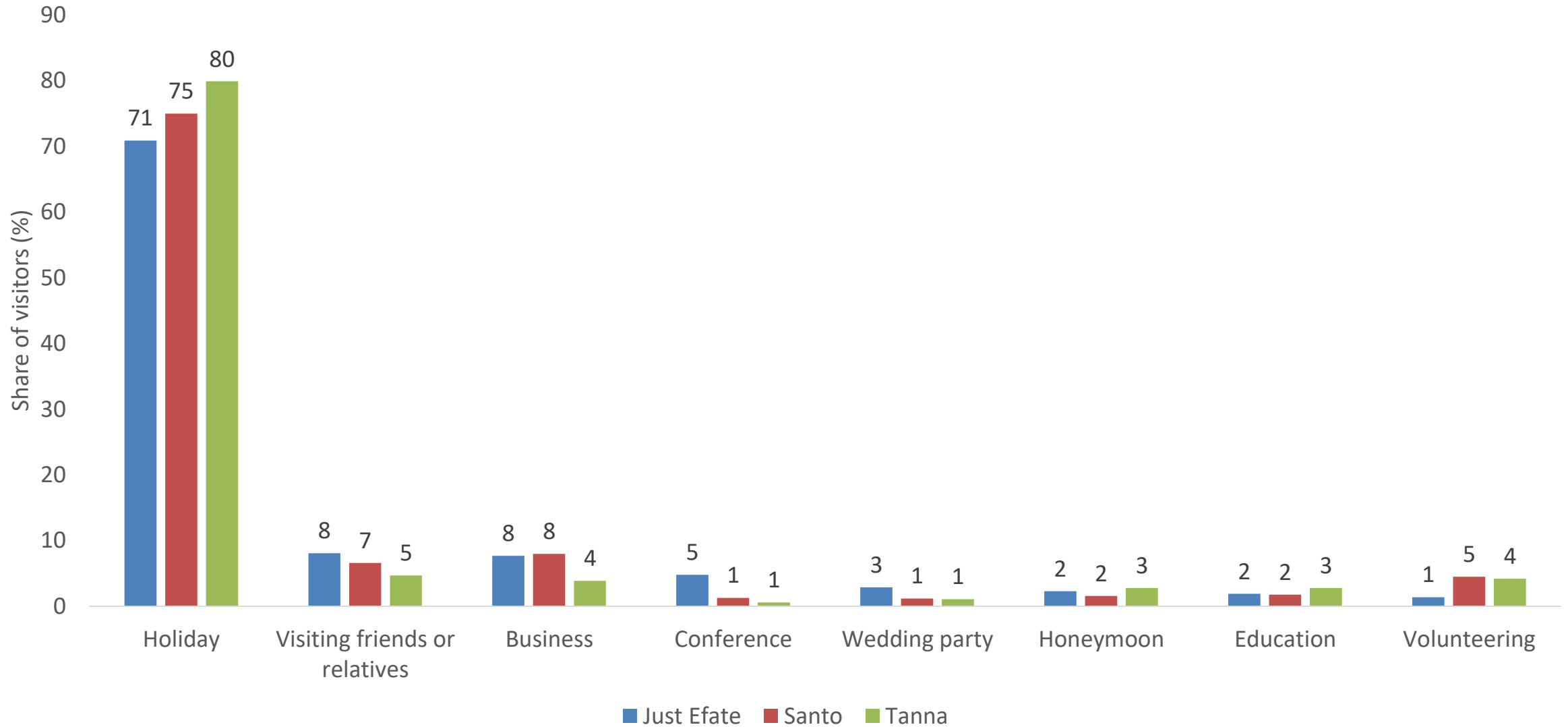
# Outer Islands - Country of Origin (2017)



# Outer Islands - Distribution of age groups



# Outer Islands - Main purpose of visit



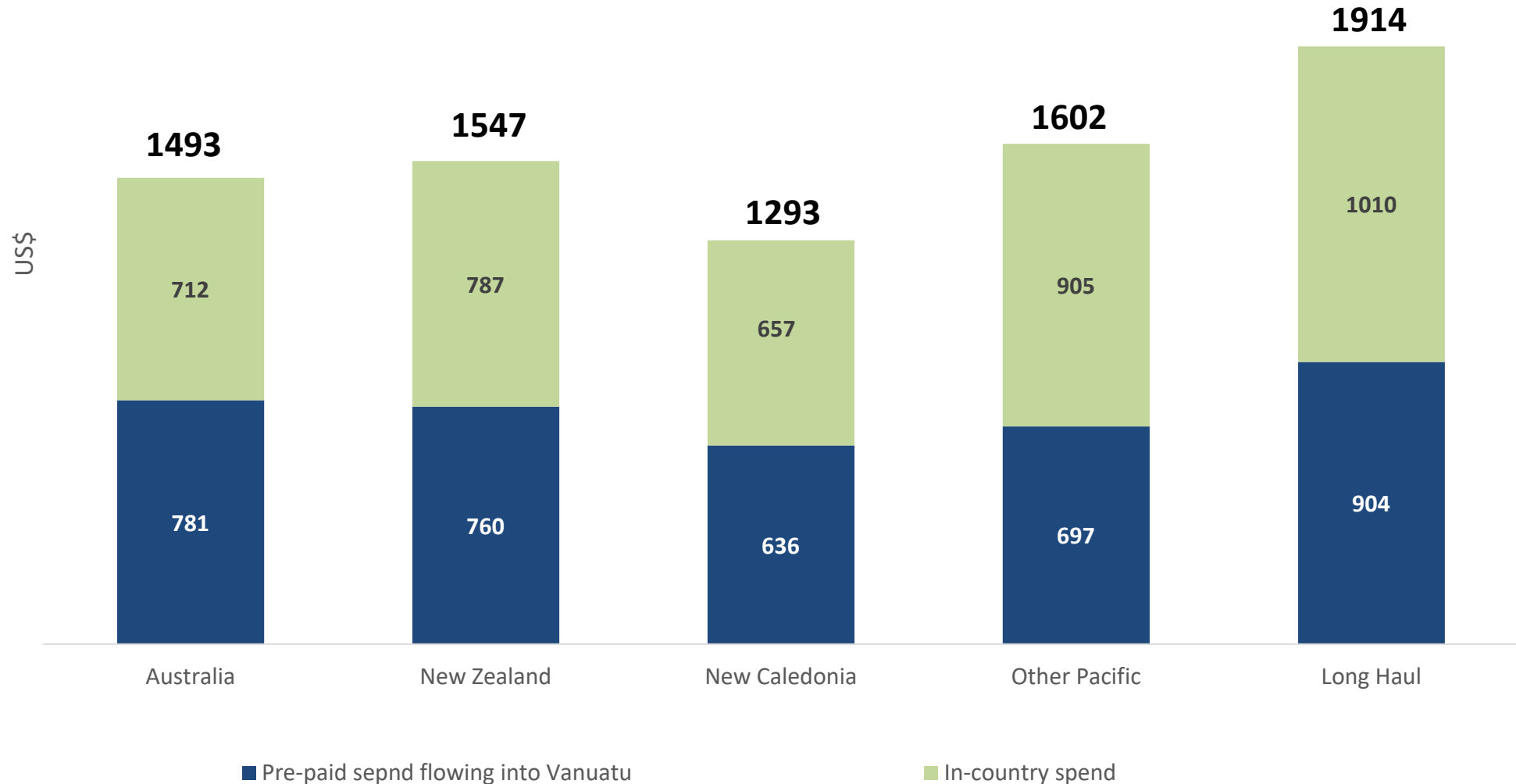
# Presentation Structure





# Expenditure by Market

## PER PERSON PER VISIT



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

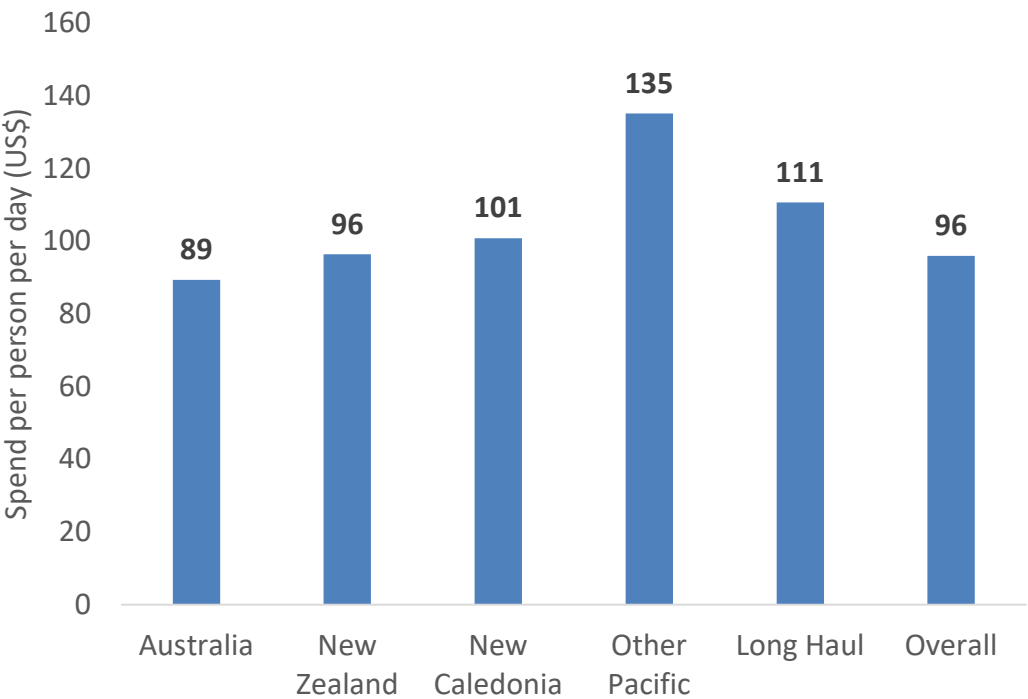
# Expenditure by Market

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
<b>Average Spend Prior to arrival</b>						
Per Person - Whole Trip	\$1,250	\$1,216	\$1,018	\$1,115	\$1,446	<b>\$1,251</b>
<b>Flowing into local economy</b> - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$781	\$760	\$636	\$697	\$904	<b>\$782</b>
Per Person per Day	\$98	\$93	\$98	\$104	\$99	<b>\$99</b>
Length of stay	8.0 nights	8.2 nights	6.5 nights	6.7 nights	9.1 nights	<b>7.9 nights</b>
<b>Average Spend while in Vanuatu</b>						
Per Person - Whole Trip	\$712	\$787	\$657	\$905	\$1010	<b>\$758</b>
Per Person per Day	\$89	\$96	\$101	\$135	\$111	<b>\$96</b>
<b>Total spend flowing into Vanuatu economy – Whole Trip</b>	<b>\$1,493</b>	<b>\$1,547</b>	<b>\$1,293</b>	<b>\$1,602</b>	<b>\$1,914</b>	<b>\$1,540</b>
<b>Total spend flowing into Vanuatu economy – Per Day</b>	<b>\$187</b>	<b>\$189</b>	<b>\$199</b>	<b>\$239</b>	<b>\$210</b>	<b>\$195</b>

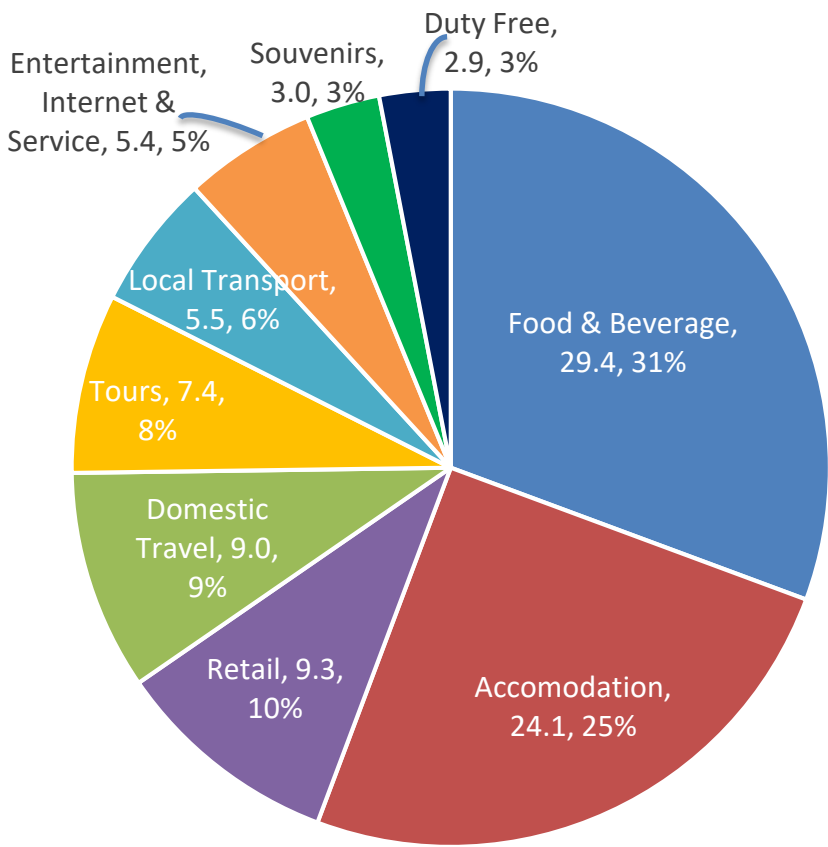
# Average Spend while in Vanuatu per day

## PER PERSON PER DAY

### By Market

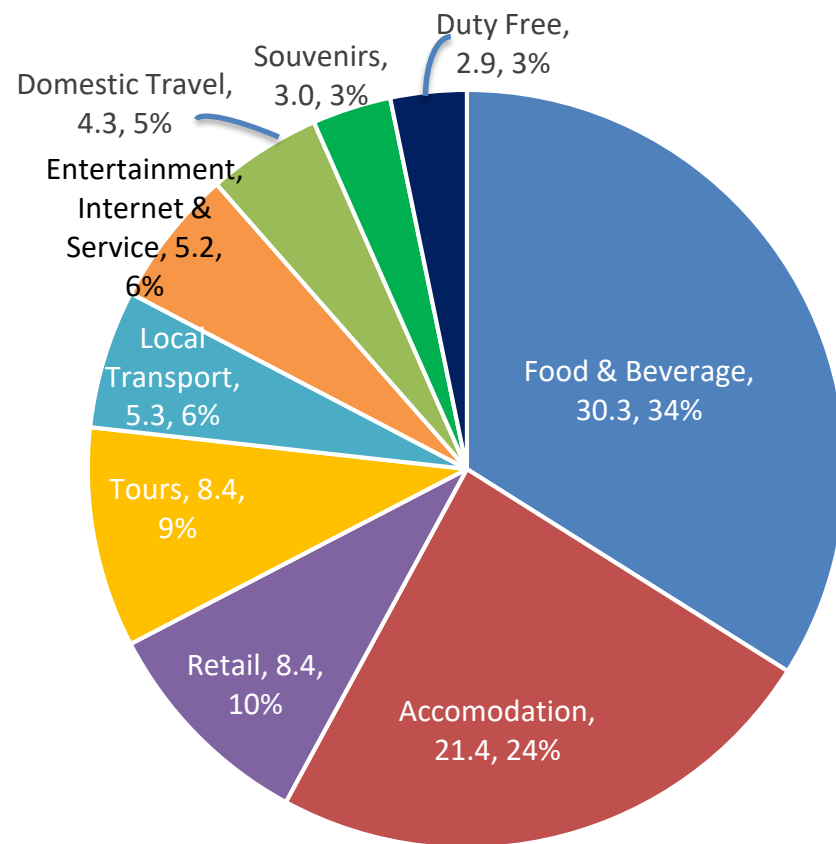


### Overall - \$96 per day

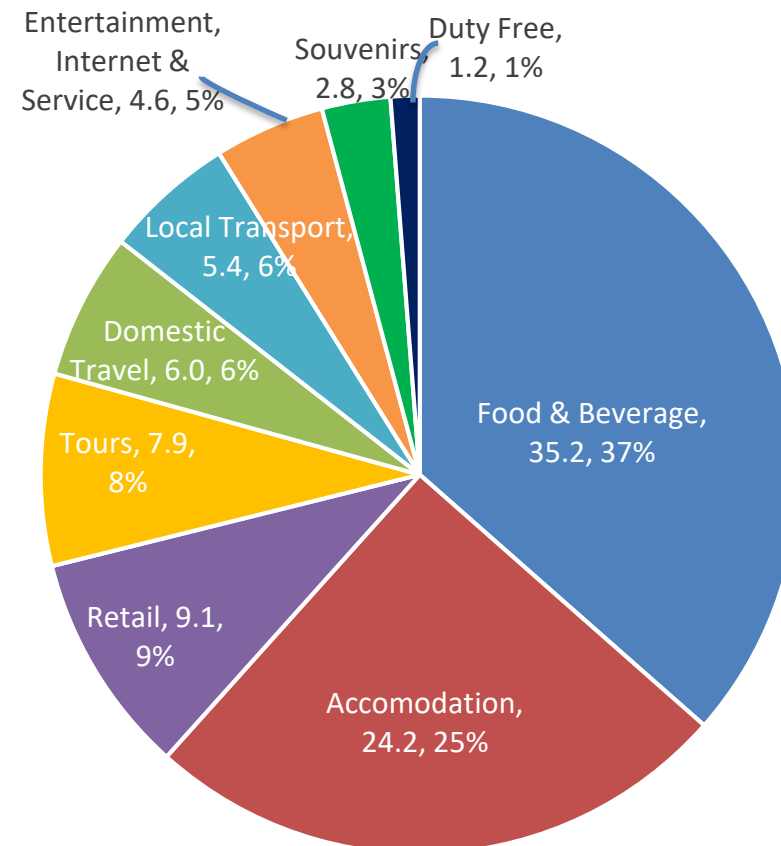


# Average Spend while in Vanuatu by Market

## Australia - \$89 per day

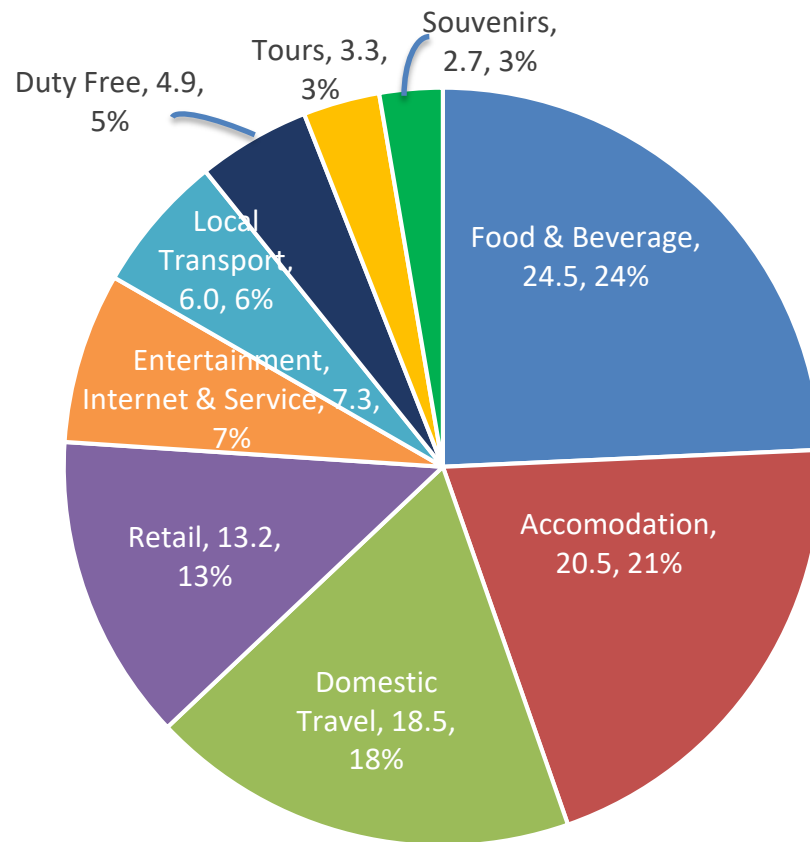


## New Zealand - \$96 per day

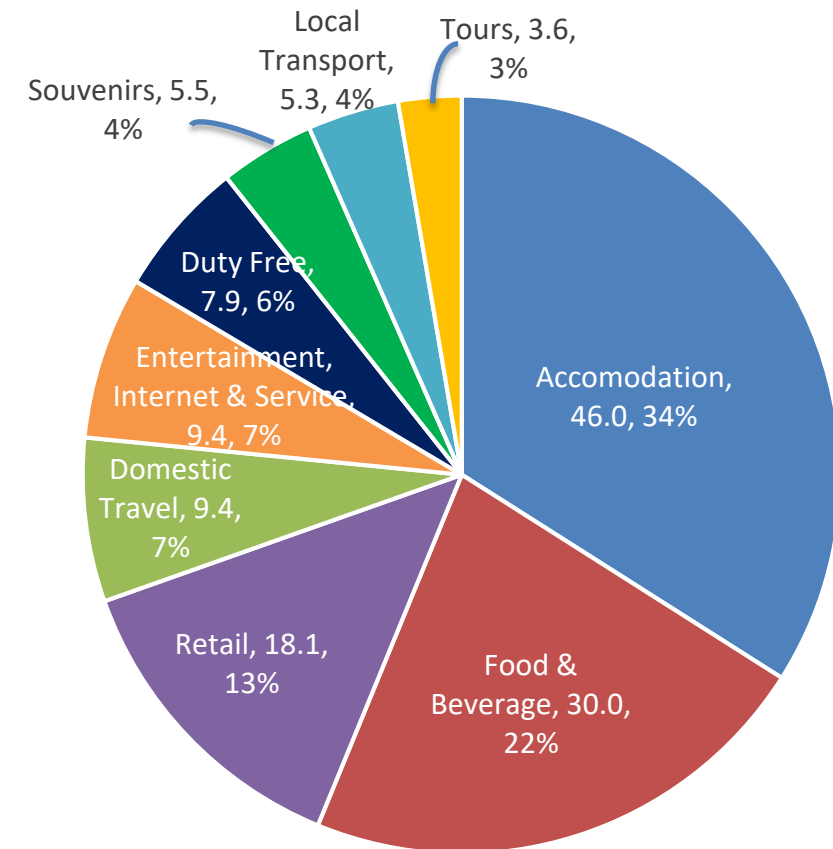


# Average Spend while in Vanuatu by Market

**New Caledonia - \$101 per day**



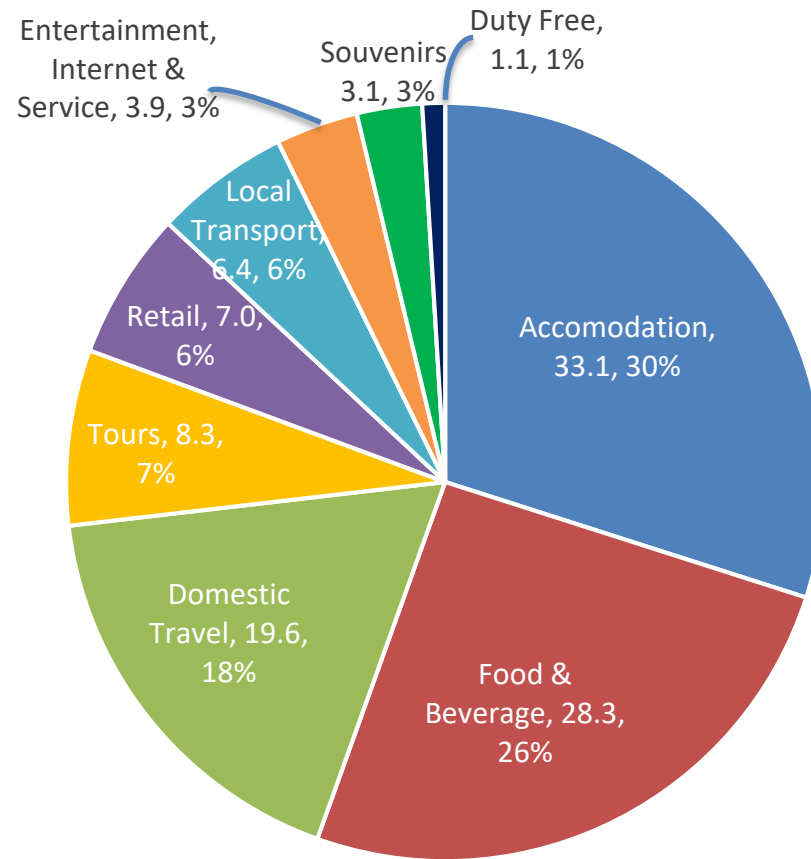
**Other Pacific - \$135 per day**





# Average Spend while in Vanuatu by Market

**Long Haul - \$111 per day**



## ML China - Average visitor expenditure in Vanuatu (US\$ per person per day)

Expenditure Group	Chinese	Other
62.5% prepaid expenditure (US\$) flowing back to Vanuatu economy per person per trip	1193	814
Prepaid expenditure (US\$) flowing back to Vanuatu economy per person per day	145	98
Length of stay	8.2 nights	8.3 nights
In-country spend (US\$) per person per trip	951	739
In-country spend (US%) per person per day	116	89
Total spend (US\$) per person per visit	2144	1553
Total spend (US\$) per person per day	261	187

# Mainland China Visitor spend – by type of travel arrangement (US\$)

Markets	Own arrangements	Prepaid package (Agent booked)
62.5% prepaid expenditure (US\$) flowing back to Vanuatu economy per person per trip	1101	1231
Prepaid expenditure (US\$) flowing back to Vanuatu economy per person per day	127	256
Length of stay	8.7 nights	4.8 nights
In-country spend (US\$) per person per trip	1044	427
In-country spend (US%) per person per day	120	89
Total spend (US\$) per person per trip	2145	1658
Total spend (US\$) per person per day	247	345

# Visitor Expenditure – Per Person and Total

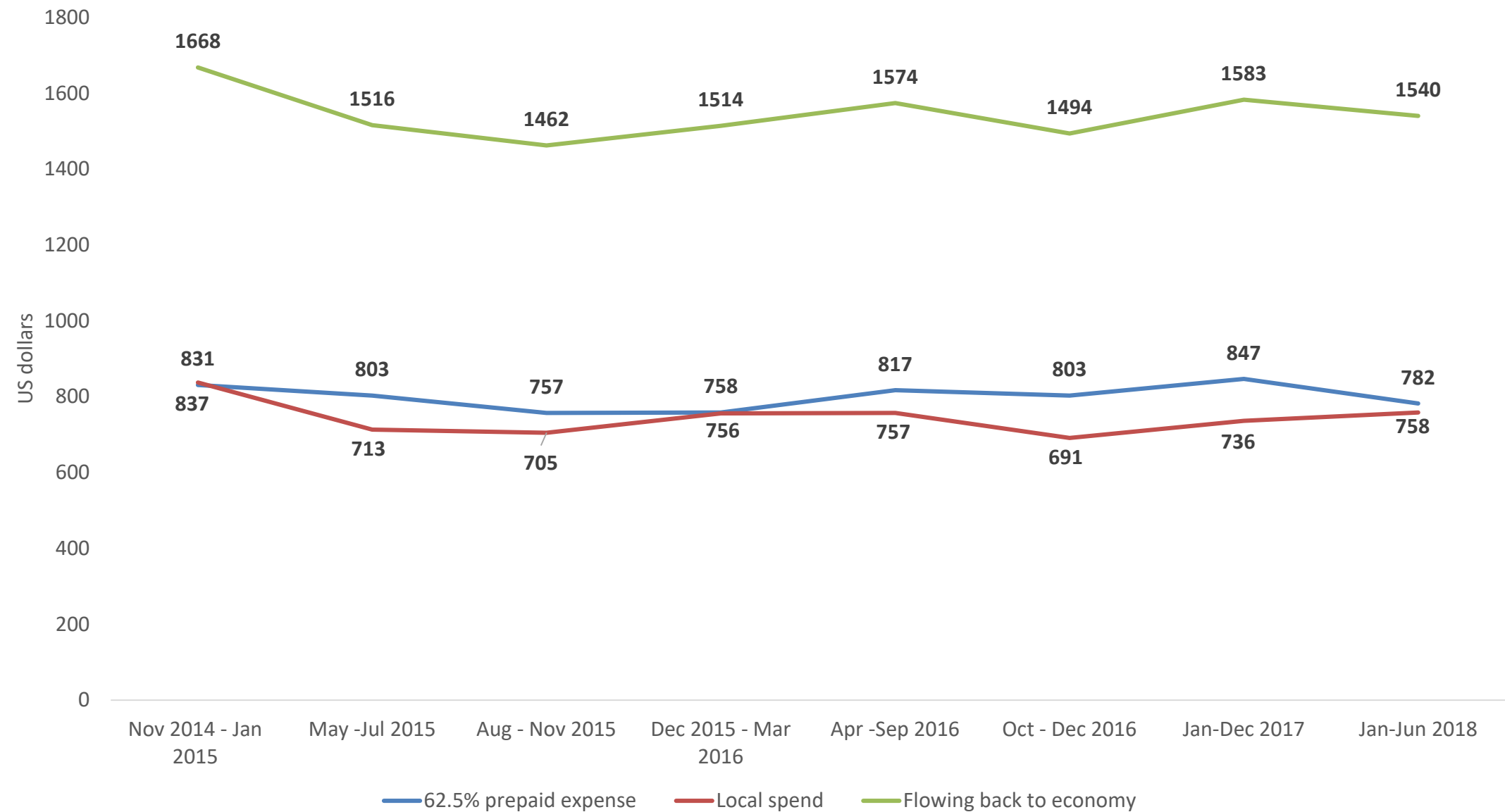
	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$99 Vt 10,690		US\$96 Vt 10,367		US\$195 Vt 21,057
Whole Trip	US\$782 Vt 84,436		US\$758 Vt 81,901		US\$1,540 Vt 166,337

## Direct economic impact on Vanuatu for Jan-Jun 2018

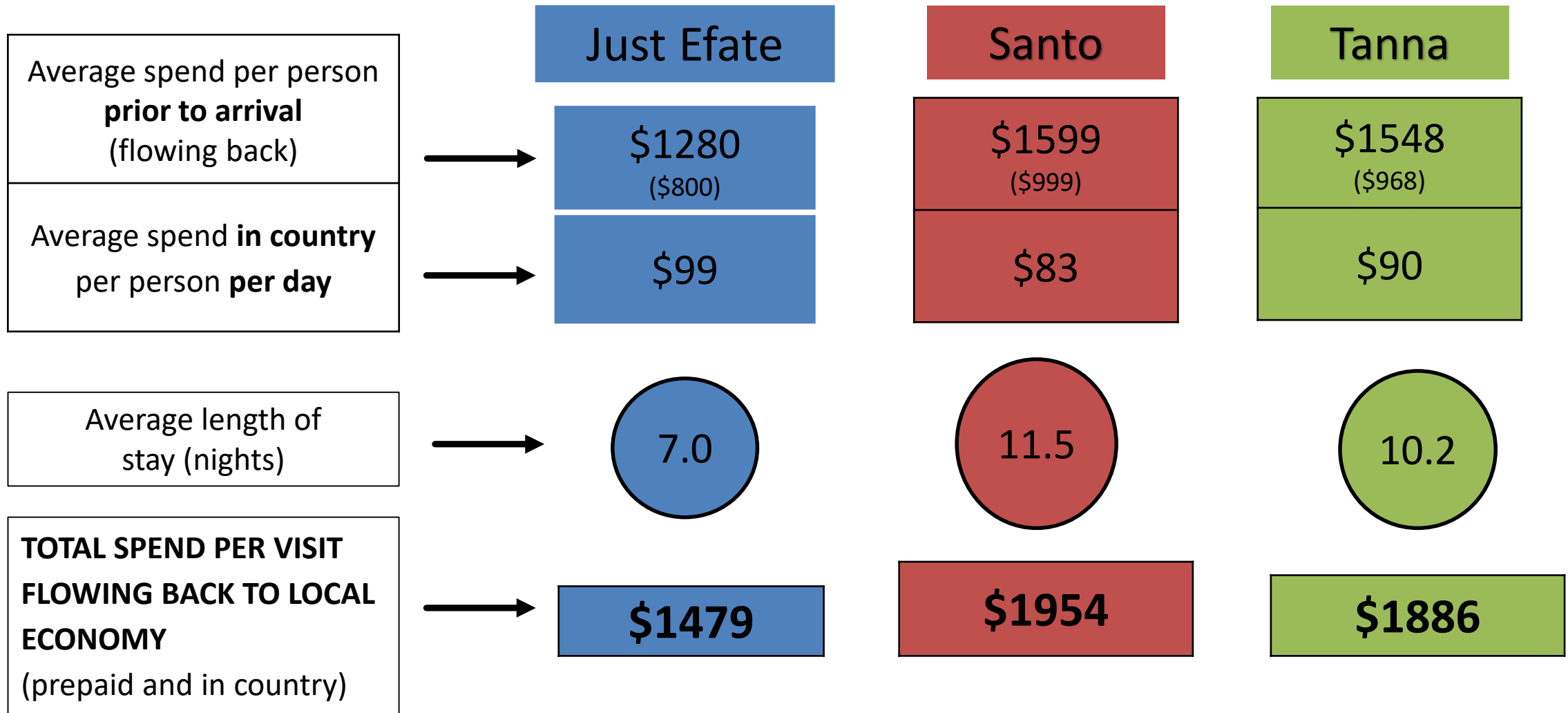
US\$80.4 million / Vt 8.7 billion in total

US\$13.4 million/ Vt 1.45 billion per month

# Overall Visitor Spend Time Series Trends



# Expenditure



# Presentation Structure

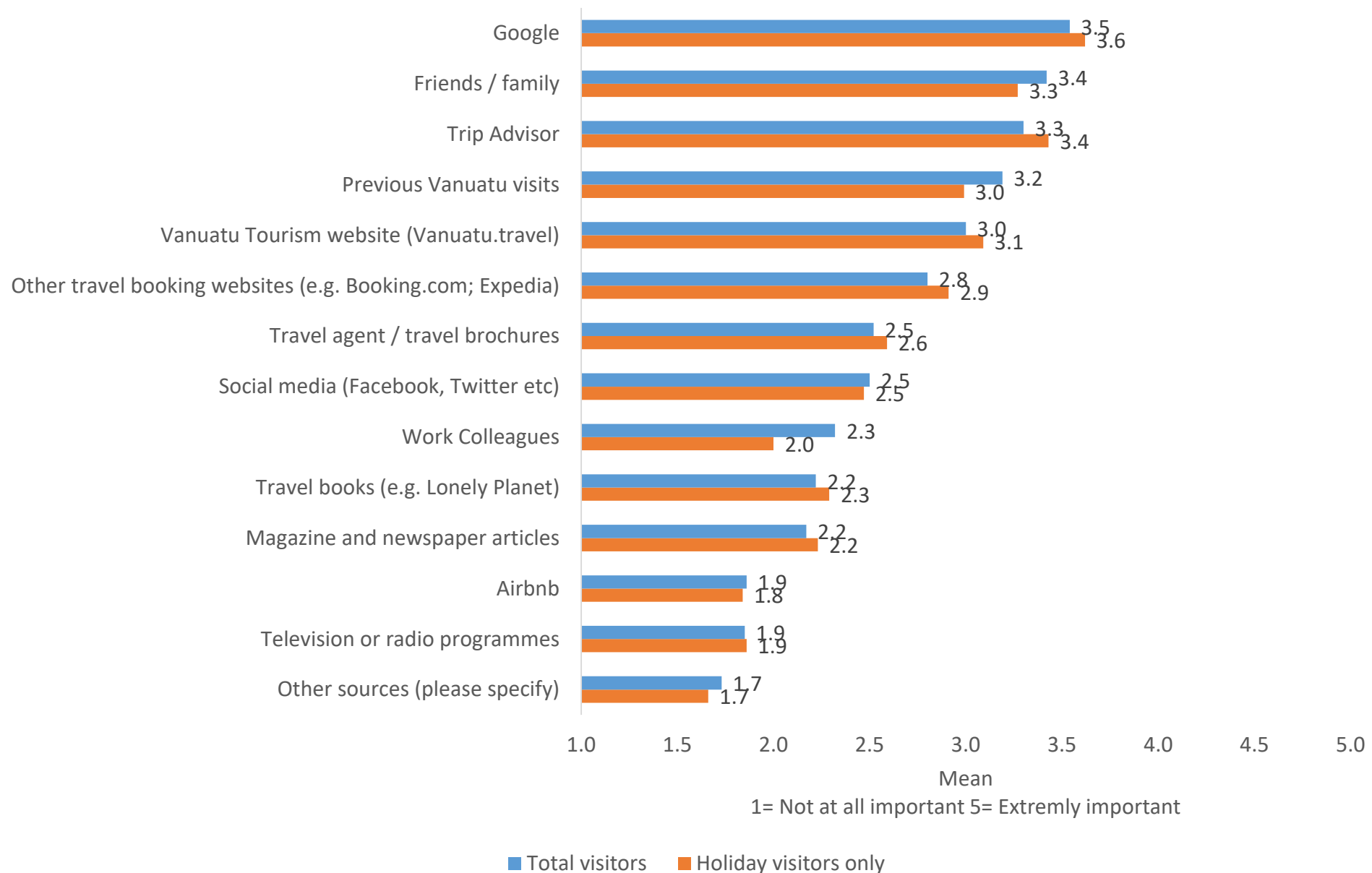




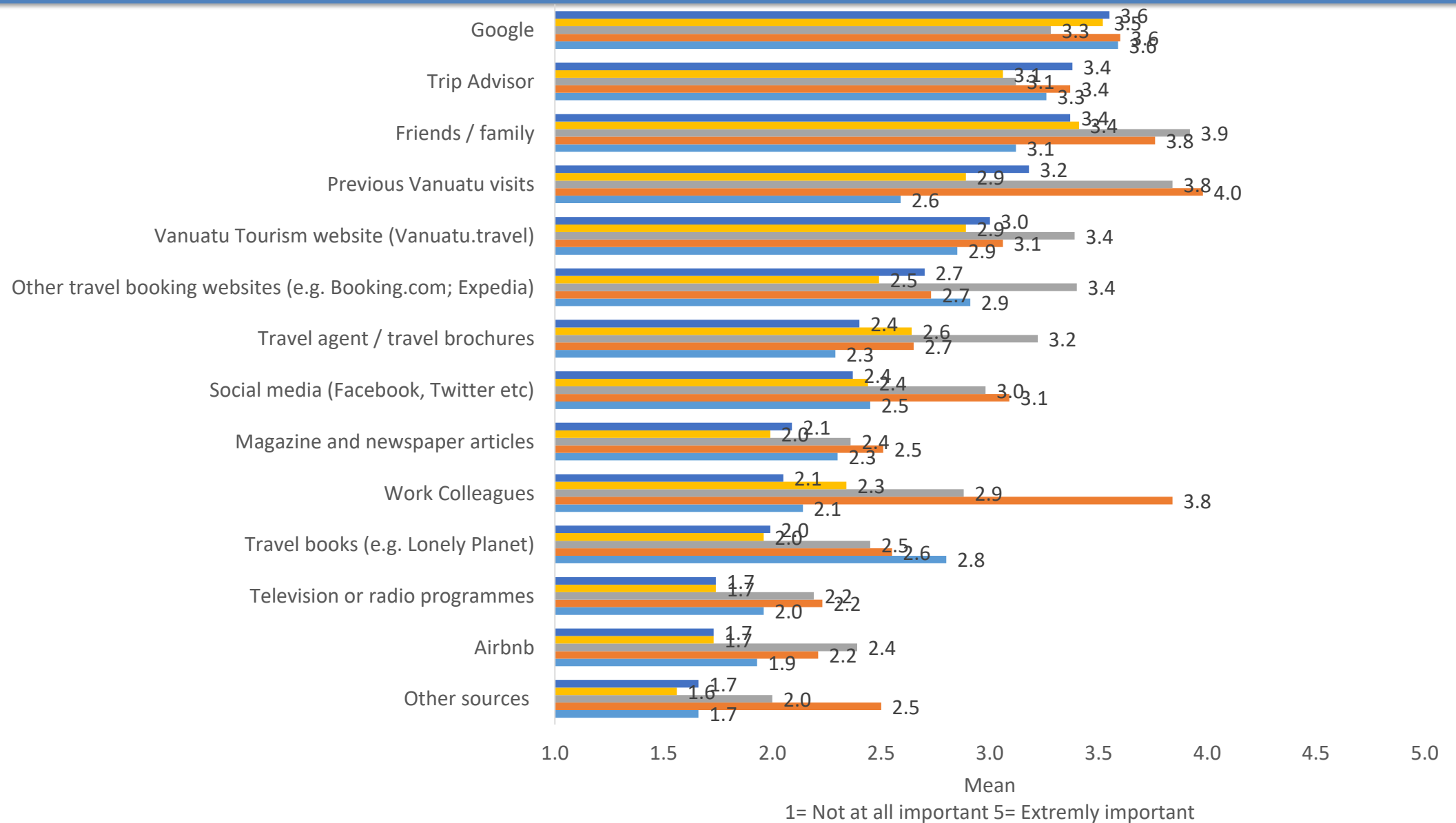
# Influences on the decision to choose Vanuatu

Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Quiet and relaxing atmosphere 4.0	Experience of a different culture 3.8	Proximity / Ease of travel 3.8	Beaches and swimming 3.7
New Zealand	Quiet and relaxing atmosphere 3.8	Experience of a different culture 3.6	Beaches and swimming 3.5	Proximity / Ease of travel 3.4
New Caledonia	Proximity / Ease of travel 4.0	Quiet and relaxing atmosphere 3.9	Affordable 3.8	Range of natural attractions 3.7
Other Pacific	Business or conference 3.6	Quiet and relaxing atmosphere 3.3	Proximity / Ease of travel 3.3	Food and cuisine 3.2
Long Haul	Experience of a different culture 4.1	Range of natural attractions 3.7	Volcanoes 3.5	Quiet and relaxing atmosphere 3.4

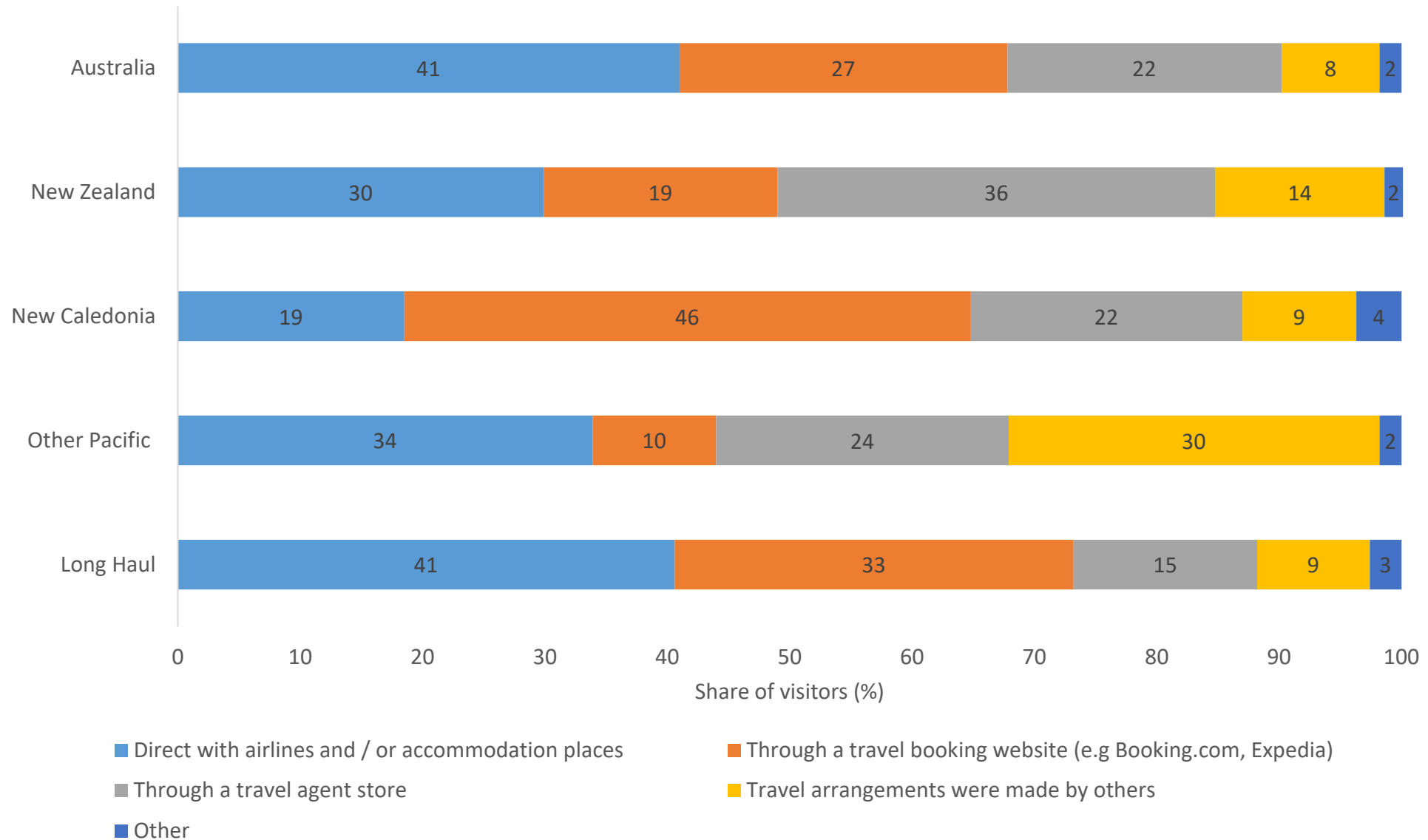
# Importance of Sources Used for Planning – Holiday



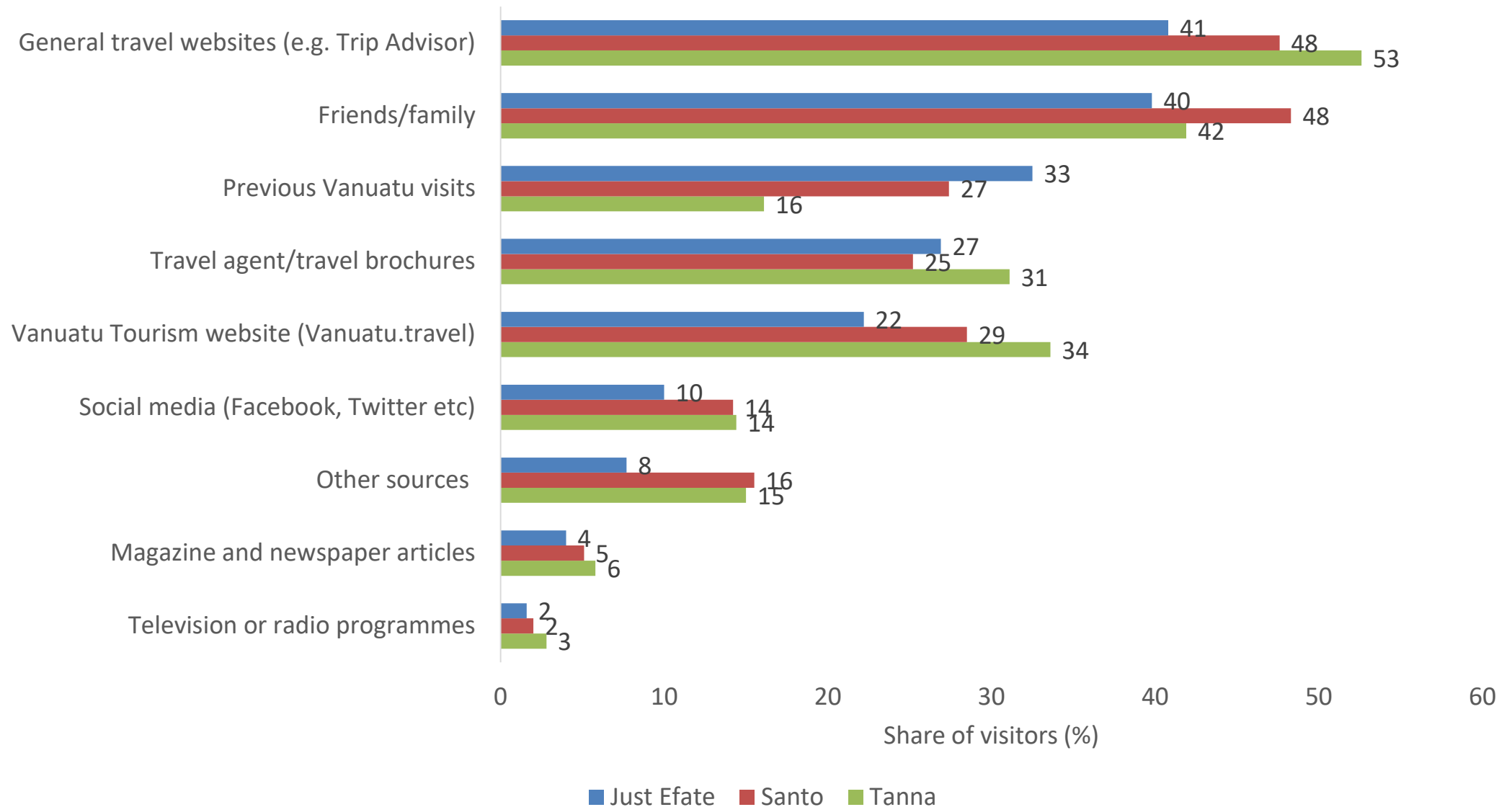
# Importance of Sources Used for Planning – Market



# Travel Purchasing Behaviour by Market

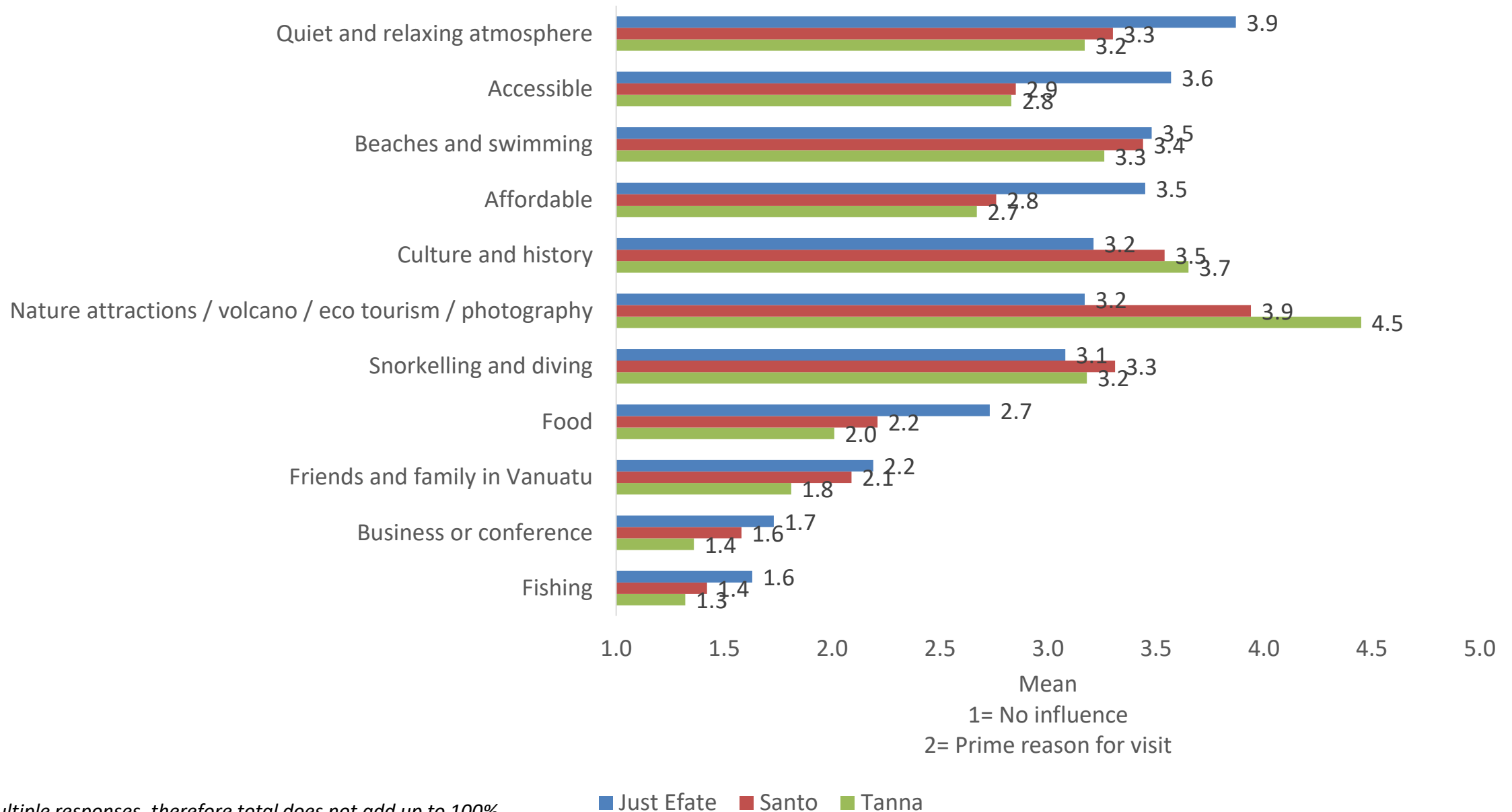


# Outer Islands: Source used for planning



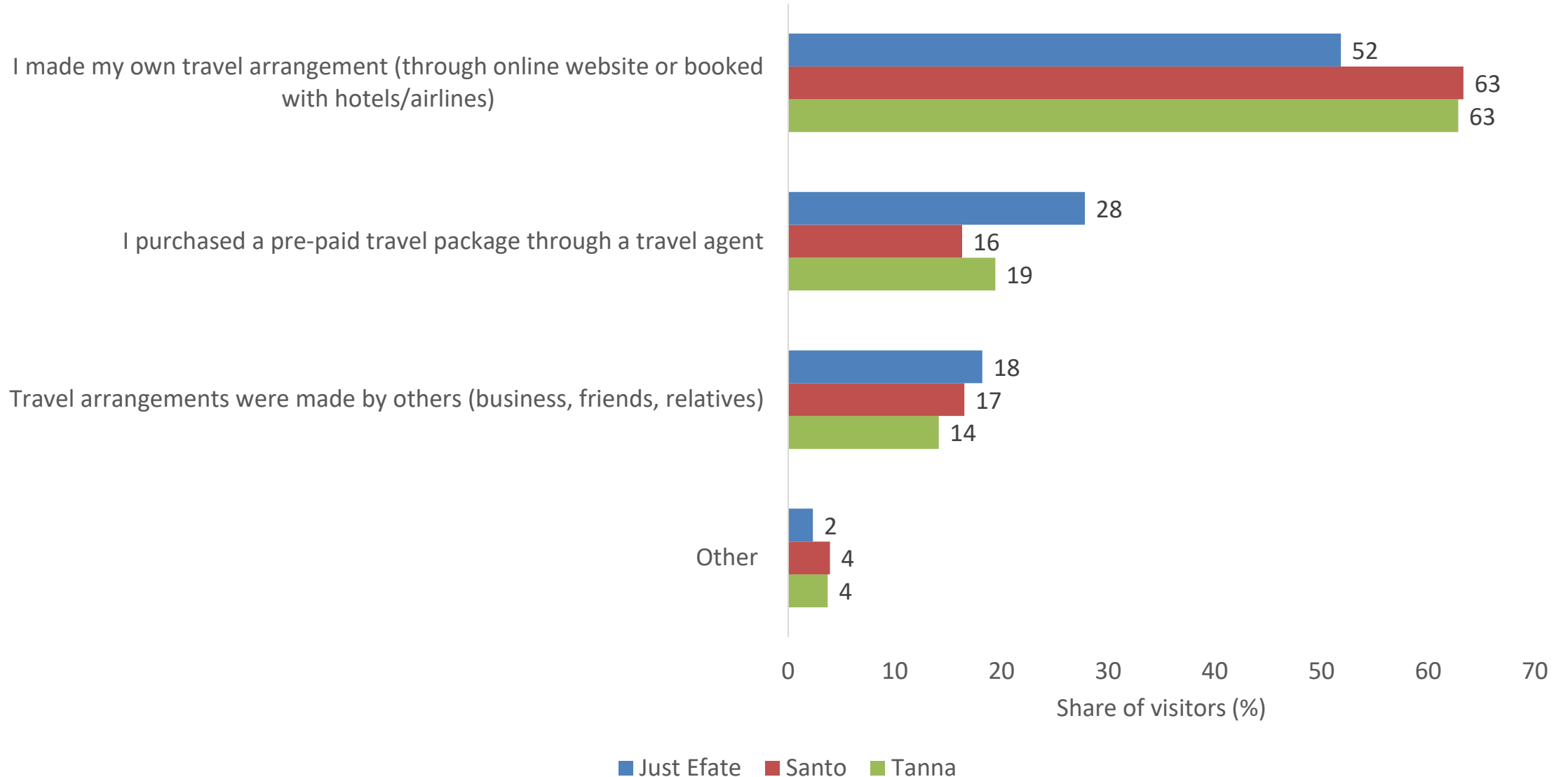
*Note: Multiple responses, therefore total does not add up to 100%*

# Outer Islands: What influenced your decision making?



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

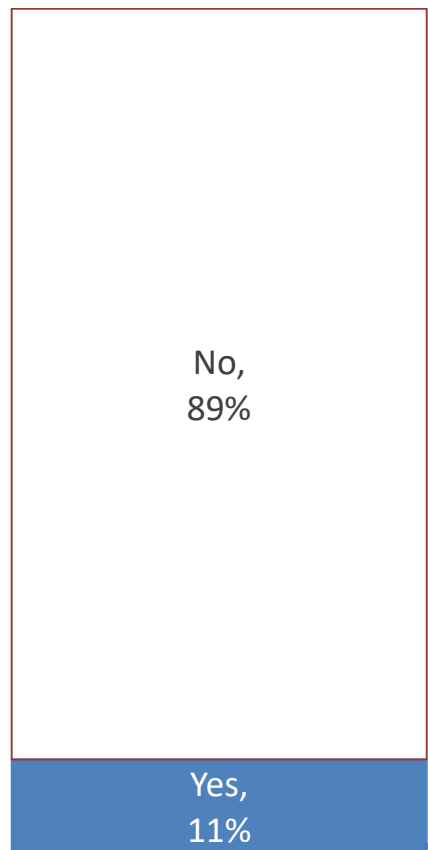
# Outer Islands: Travel Purchasing Behaviour



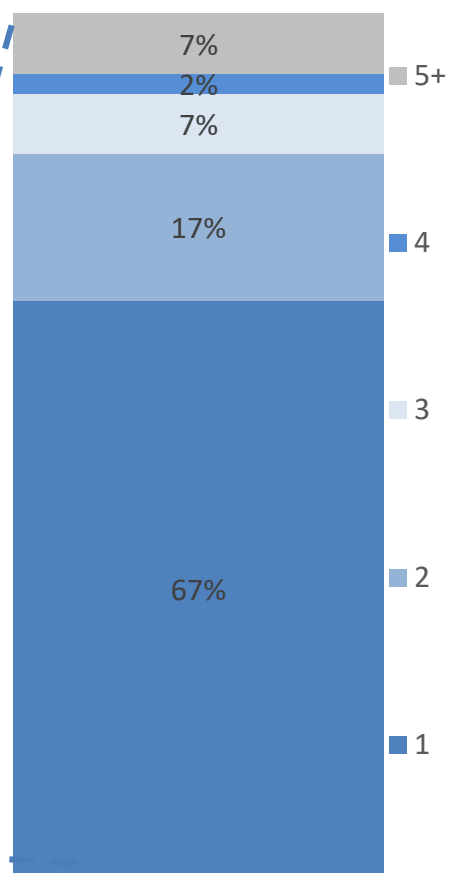


# Cruise visits to Vanuatu (holiday visitors only)

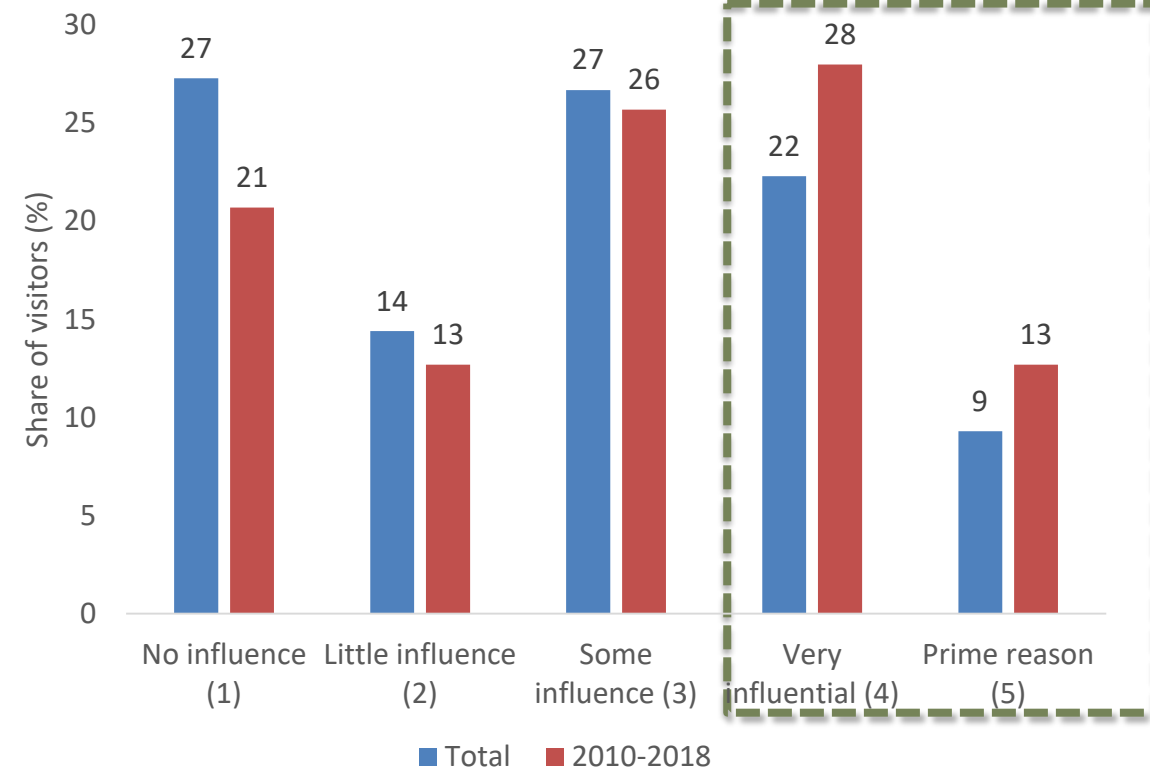
Been on a cruise to Vanuatu before?



If Yes, how many times?



Did previous cruise influence your decision to come back?



# Presentation Structure



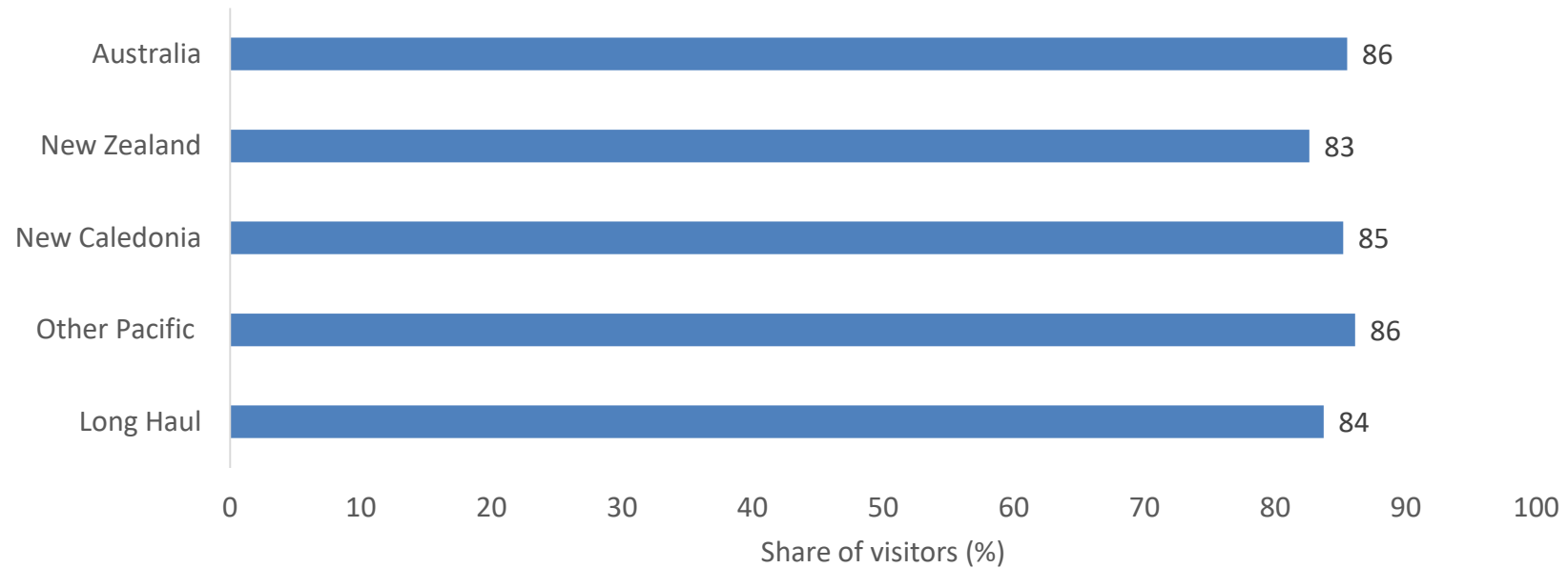
# Visitor Satisfaction

## Overall Satisfaction\*

**85%** Total visitors satisfied

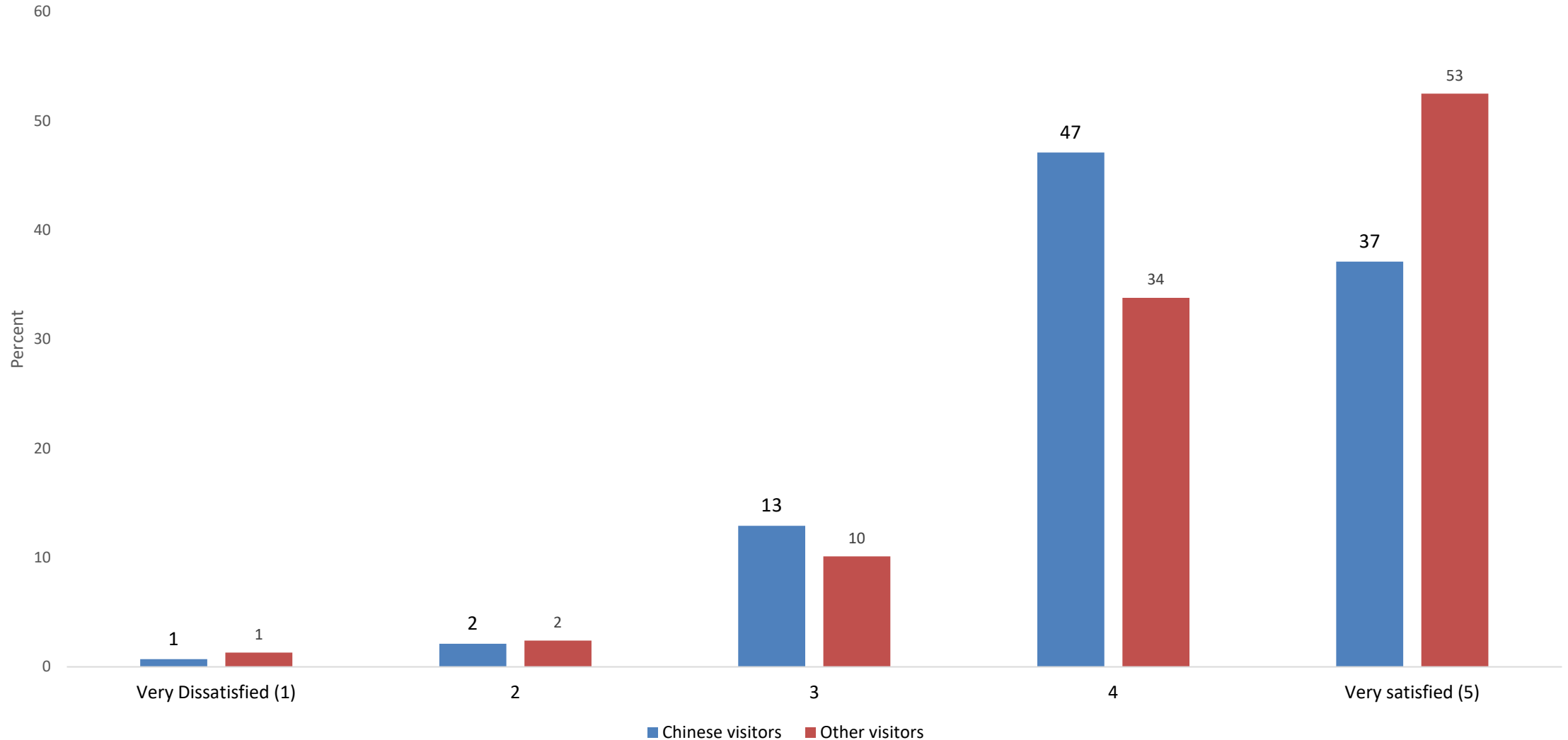
**85%** Holiday visitors satisfied

### Satisfaction by Market

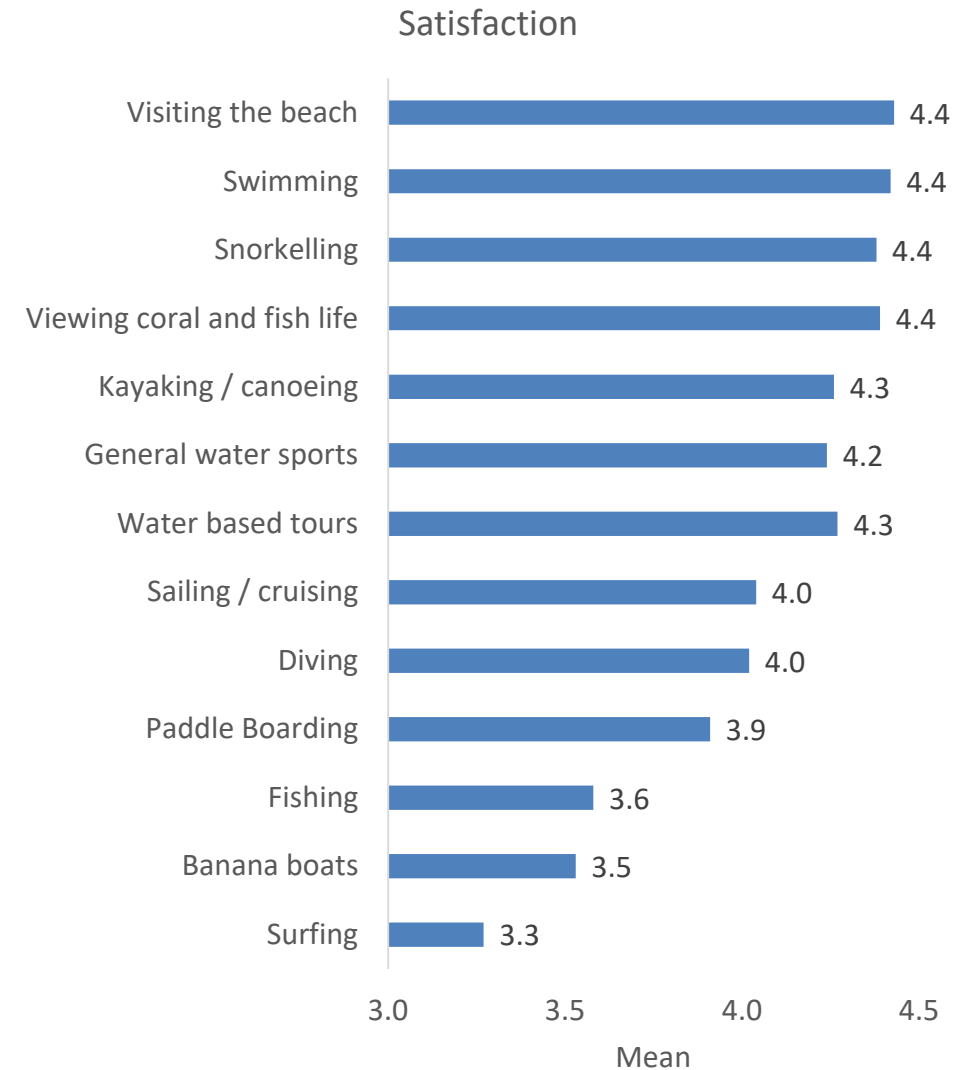
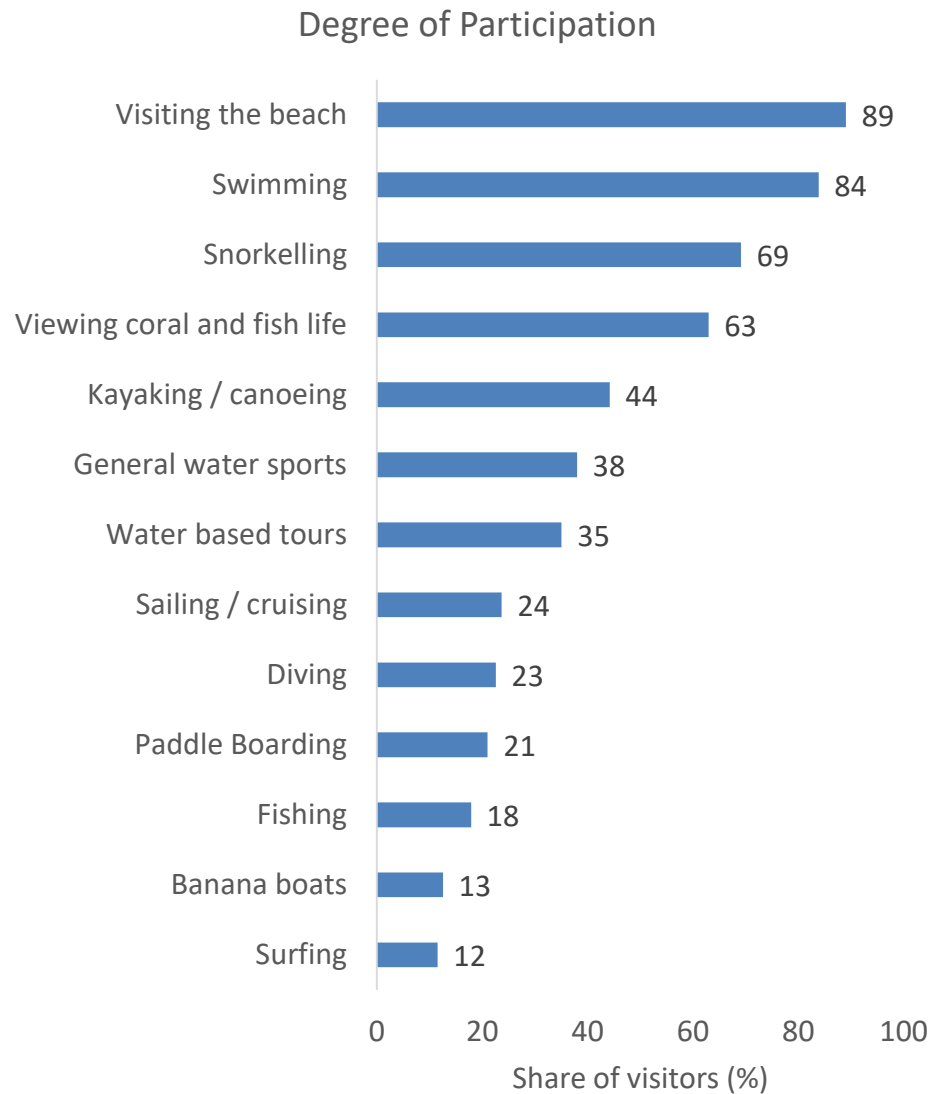


\* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

# Mainland China: Overall satisfaction with Vanuatu experience



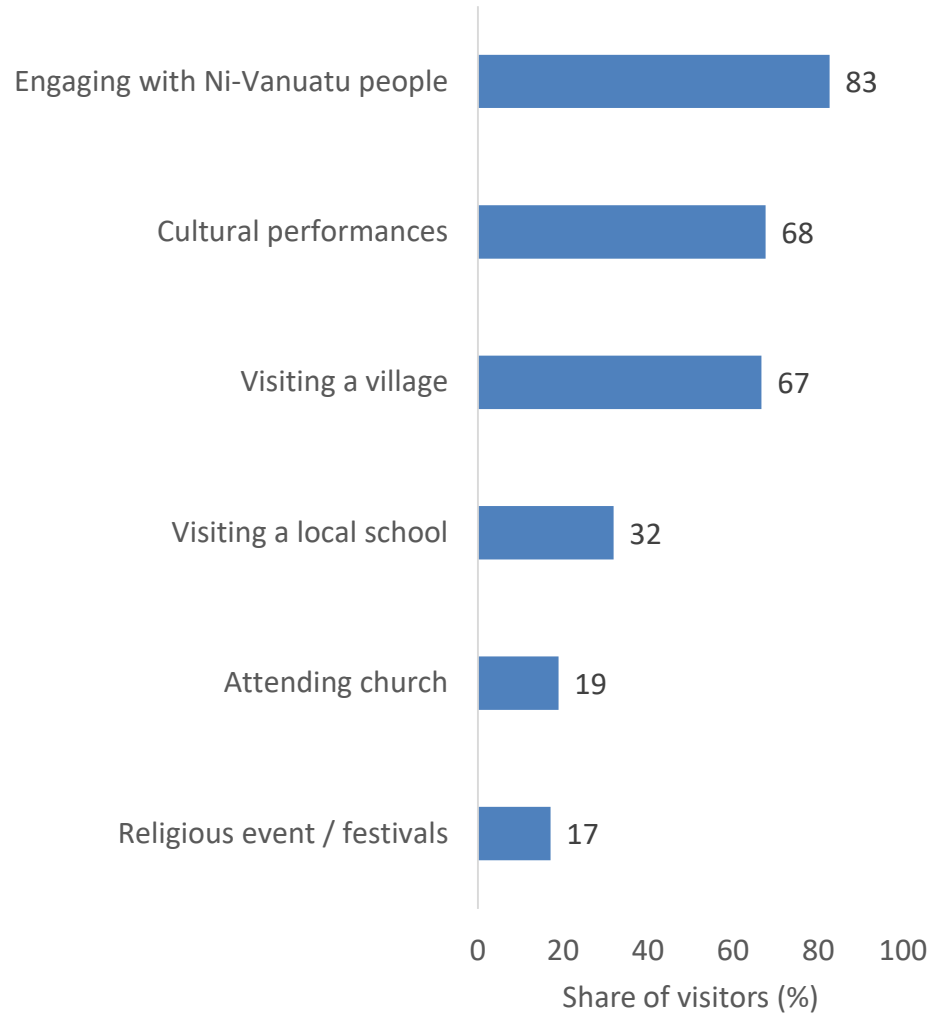
# Water Based Activities



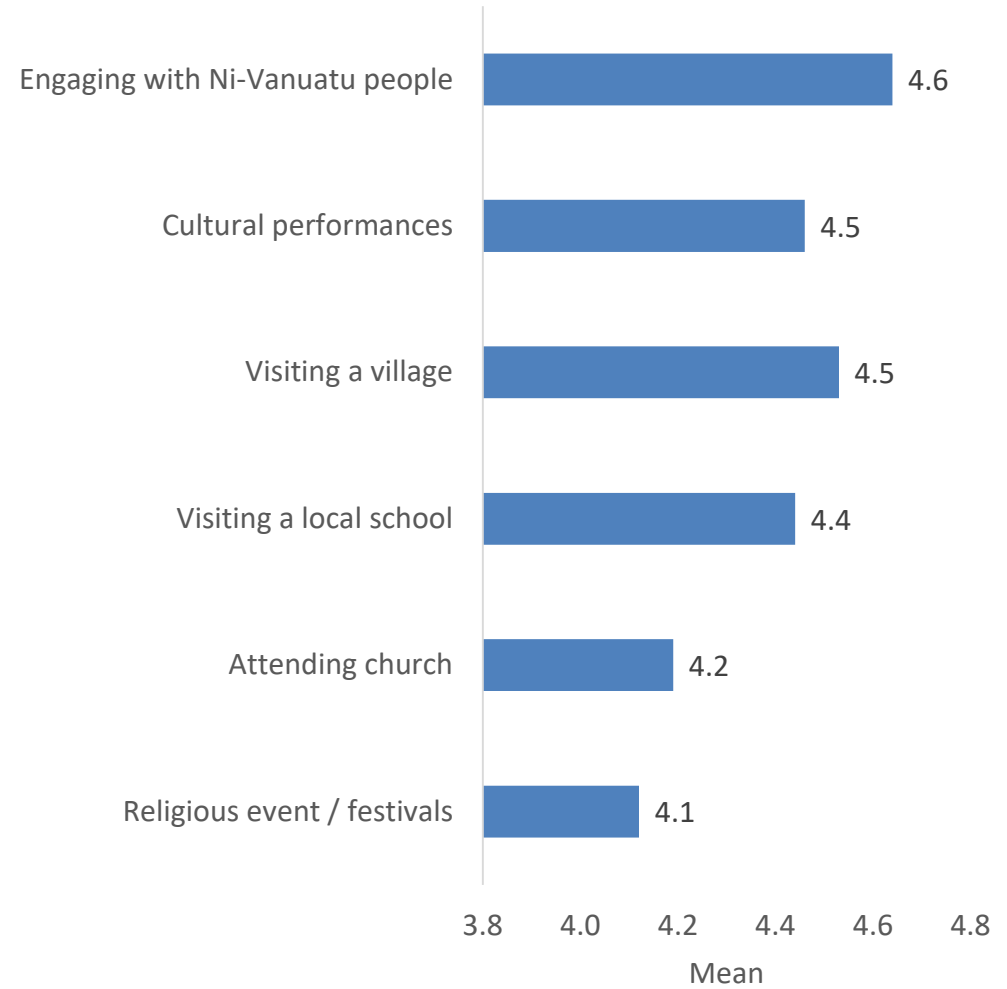
*Note: Multiple responses, therefore total does not add up to 100%*

# Cultural Interaction Activities

Degree of Participation

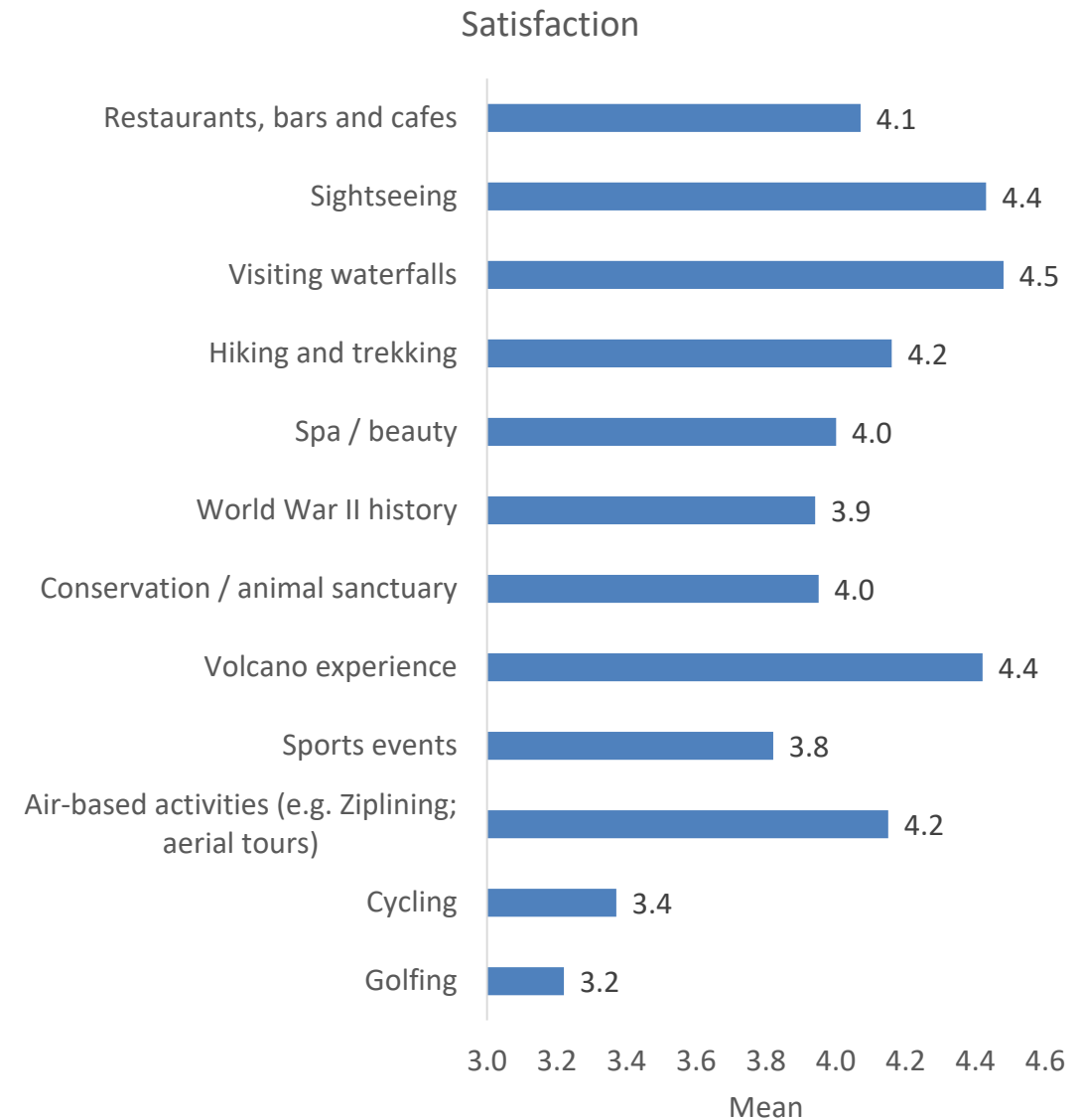
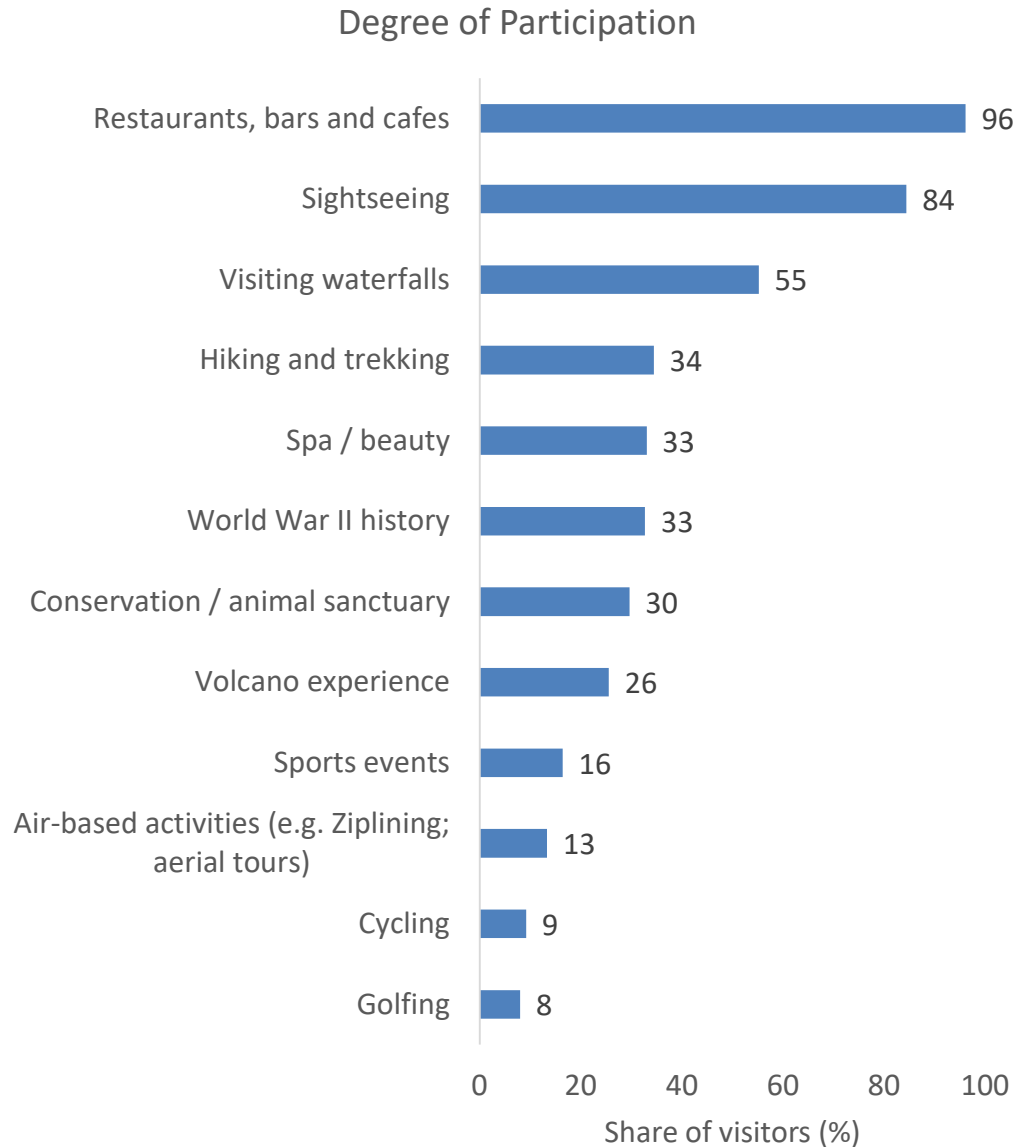


Satisfaction



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

# Land Based Activities and Touring

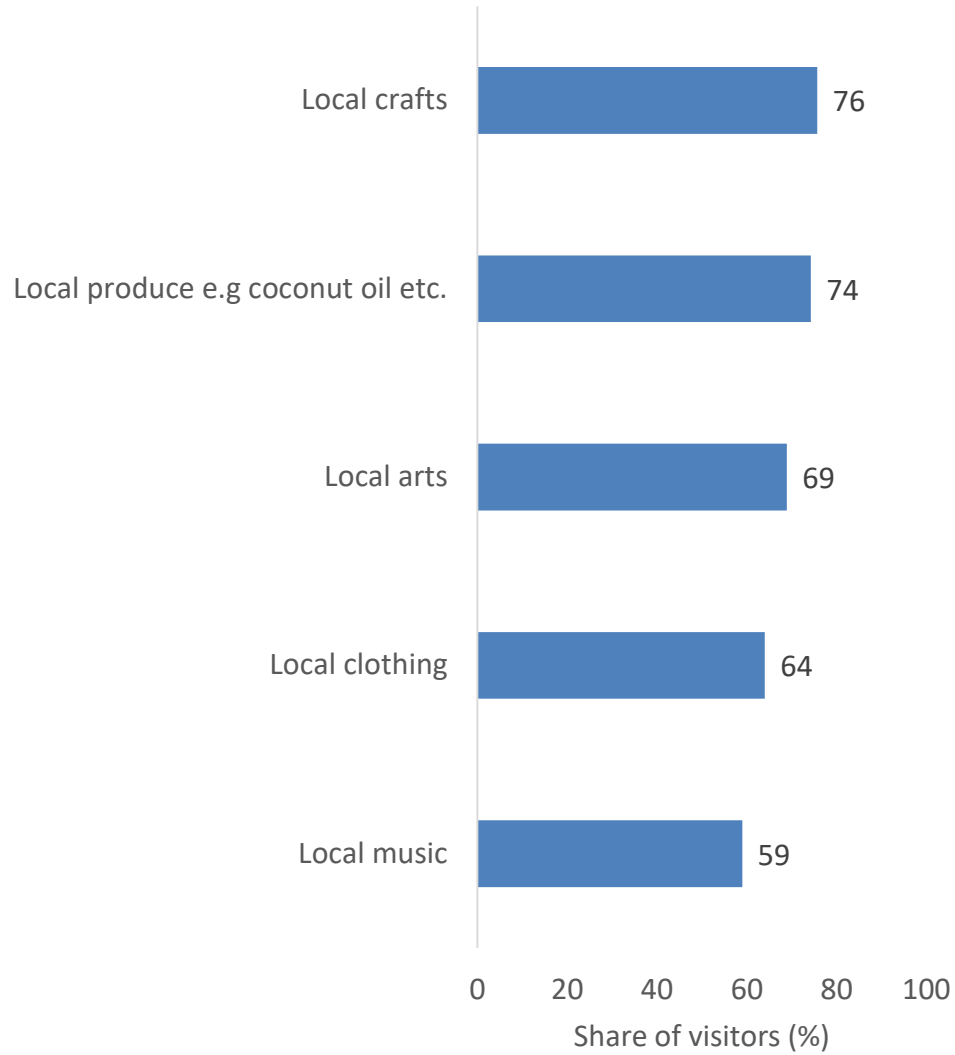


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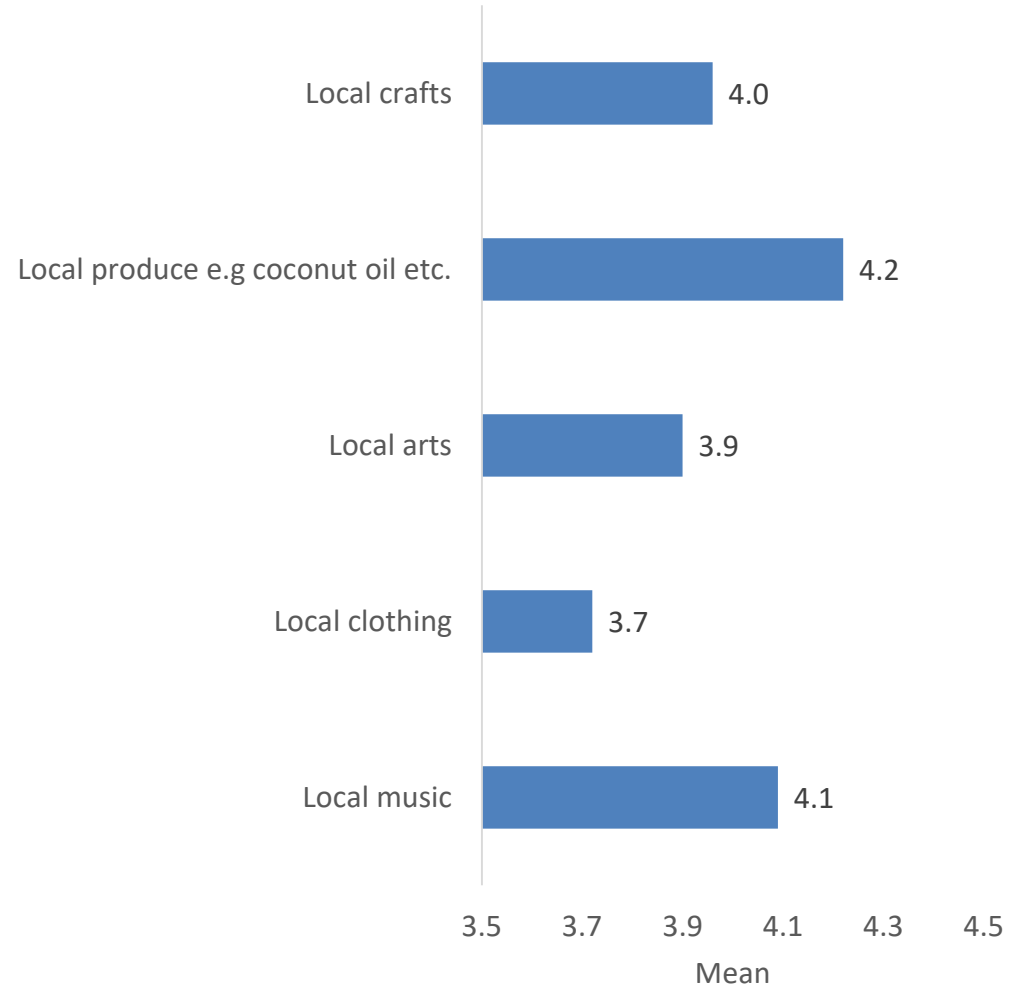


# Shopping

Degree of Participation

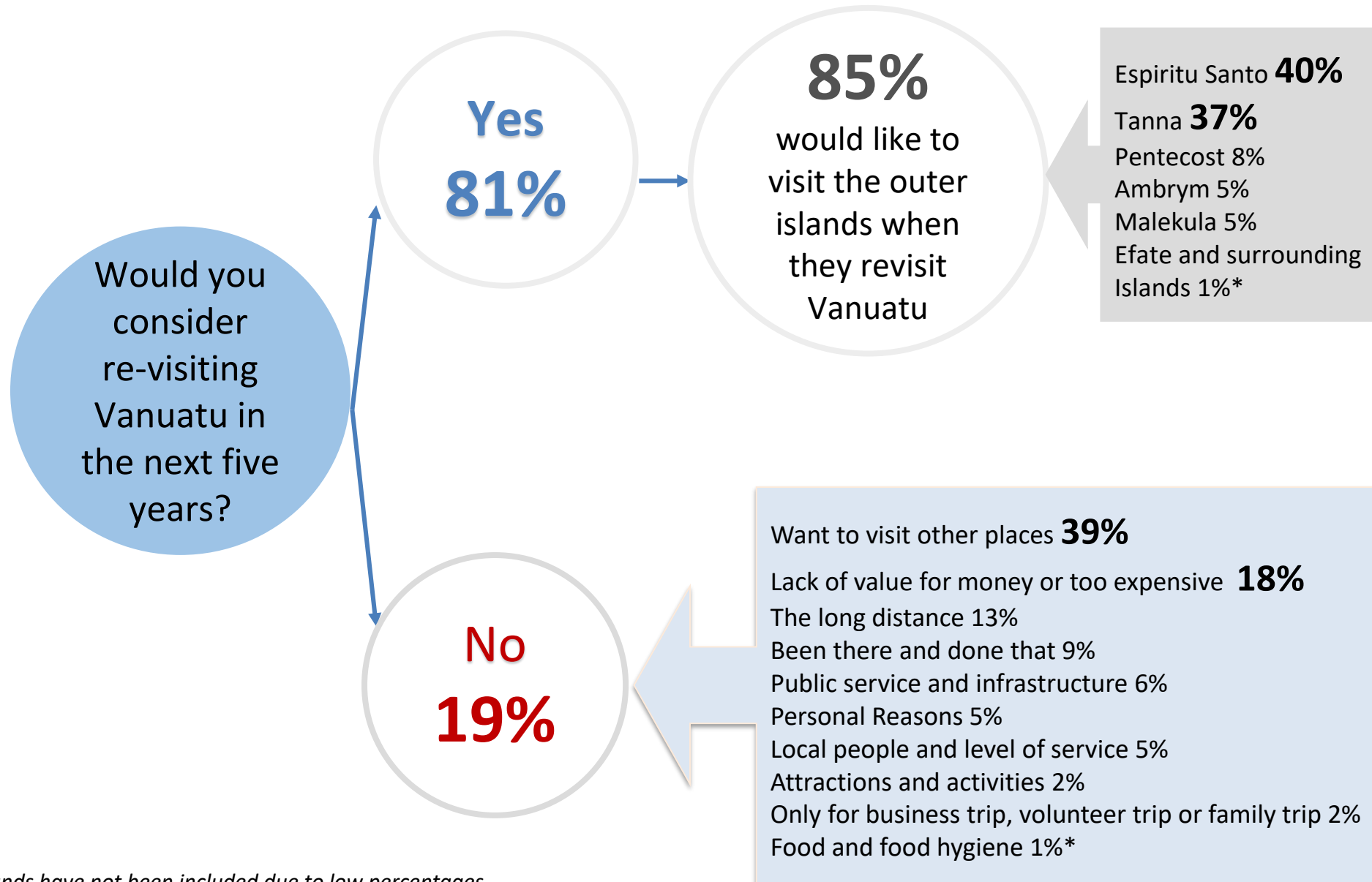


Satisfaction



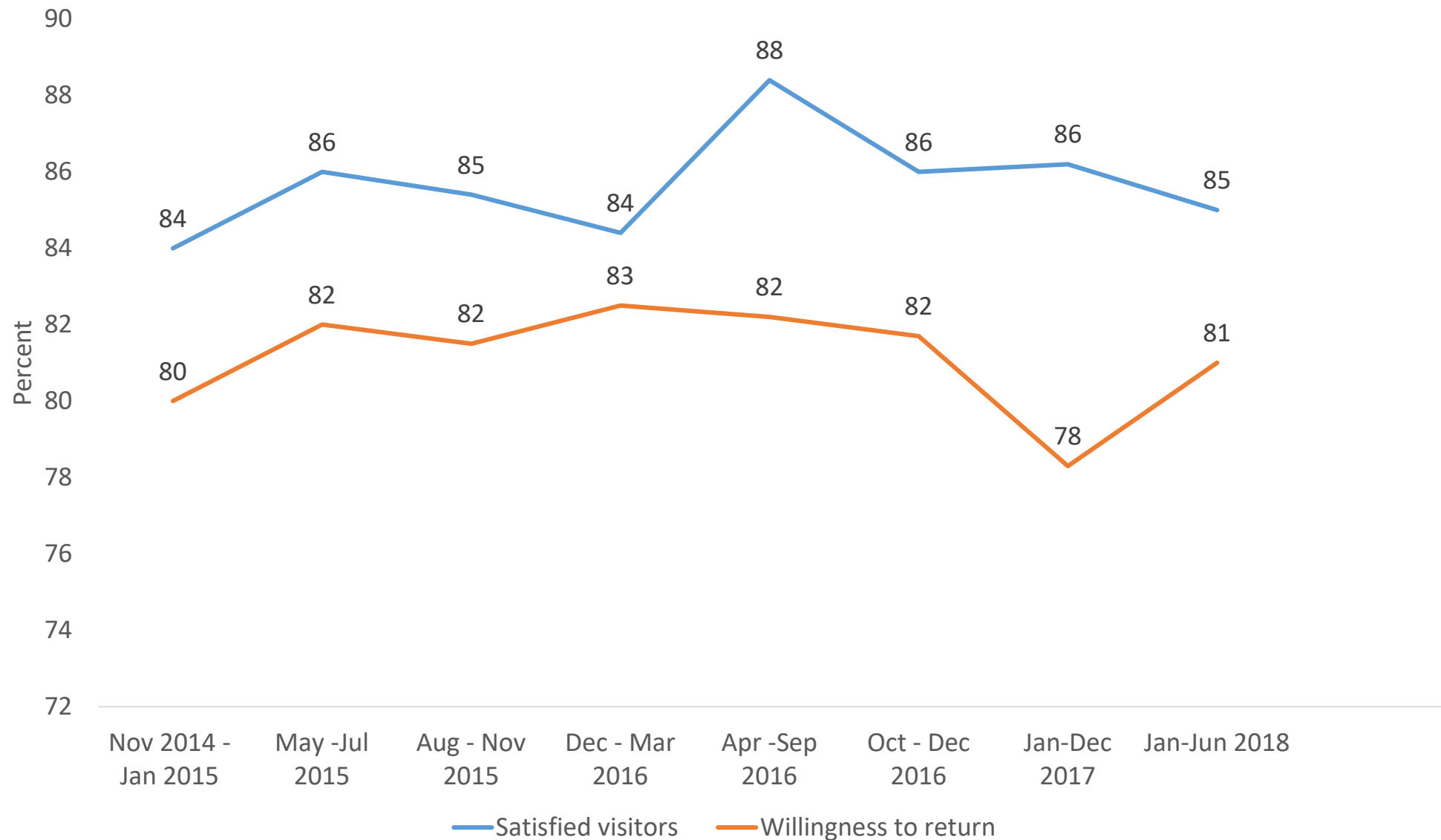
*Note: Multiple responses, therefore total does not add up to 100%*

# 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'

# Outer Islands: Future intentions

## Willingness to Return



**Just Efate**

80% would like to return

If yes, 84% would like to  
visit outer islands

**Santo**

74% would like to return

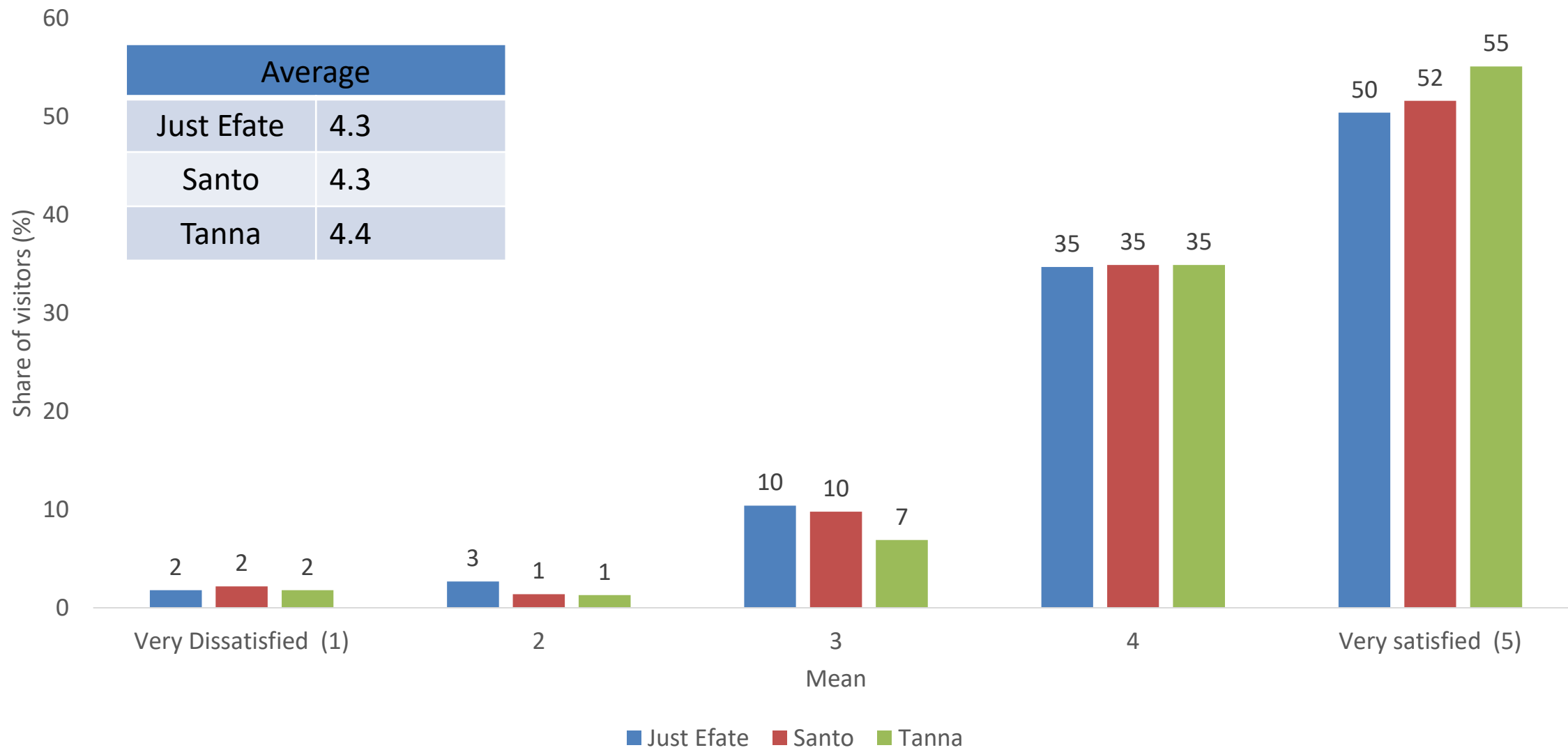
If yes, 92% would like to  
visit outer islands

**Tanna**

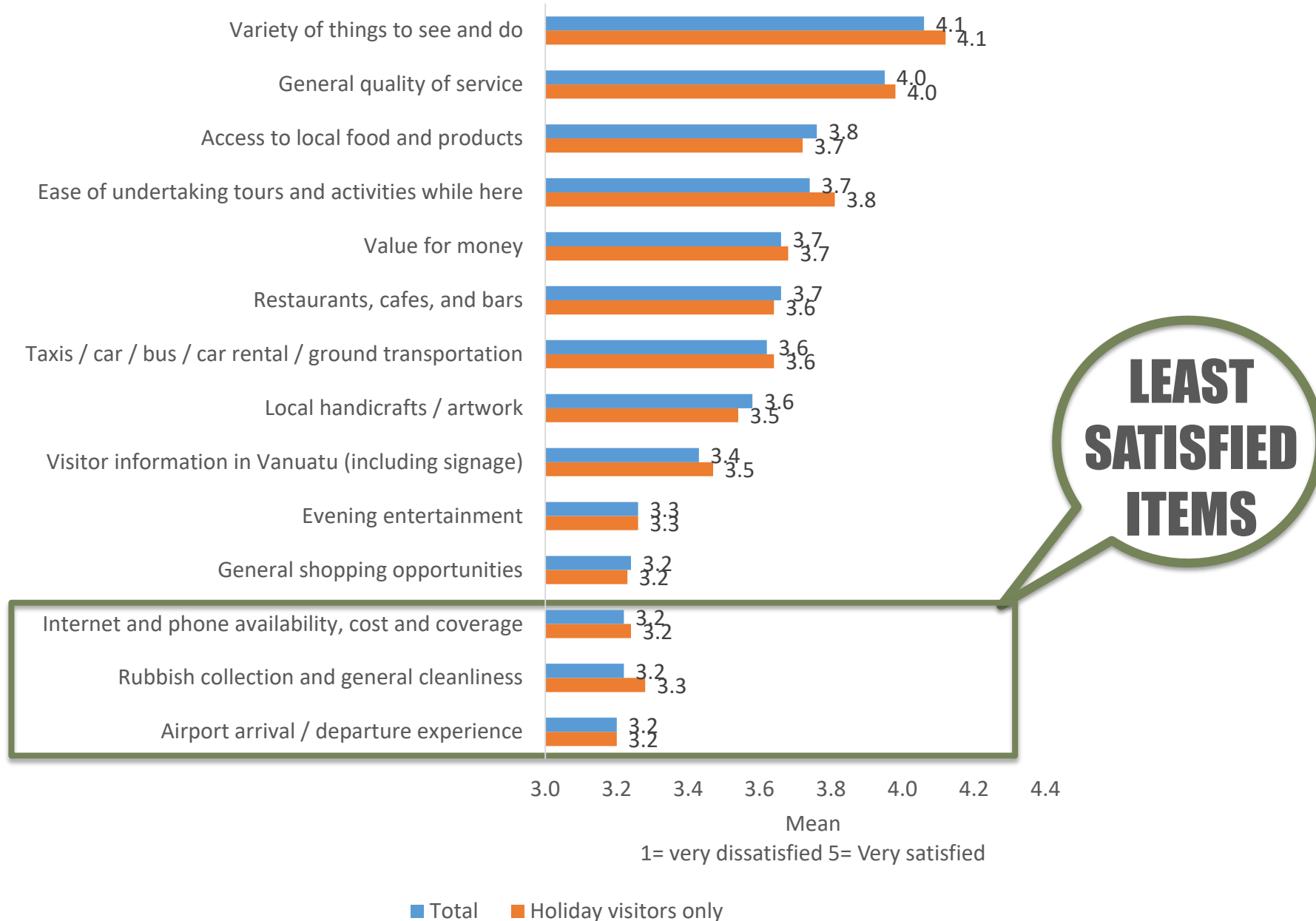
67% would like to return

If yes, 92% would like to  
visit outer islands

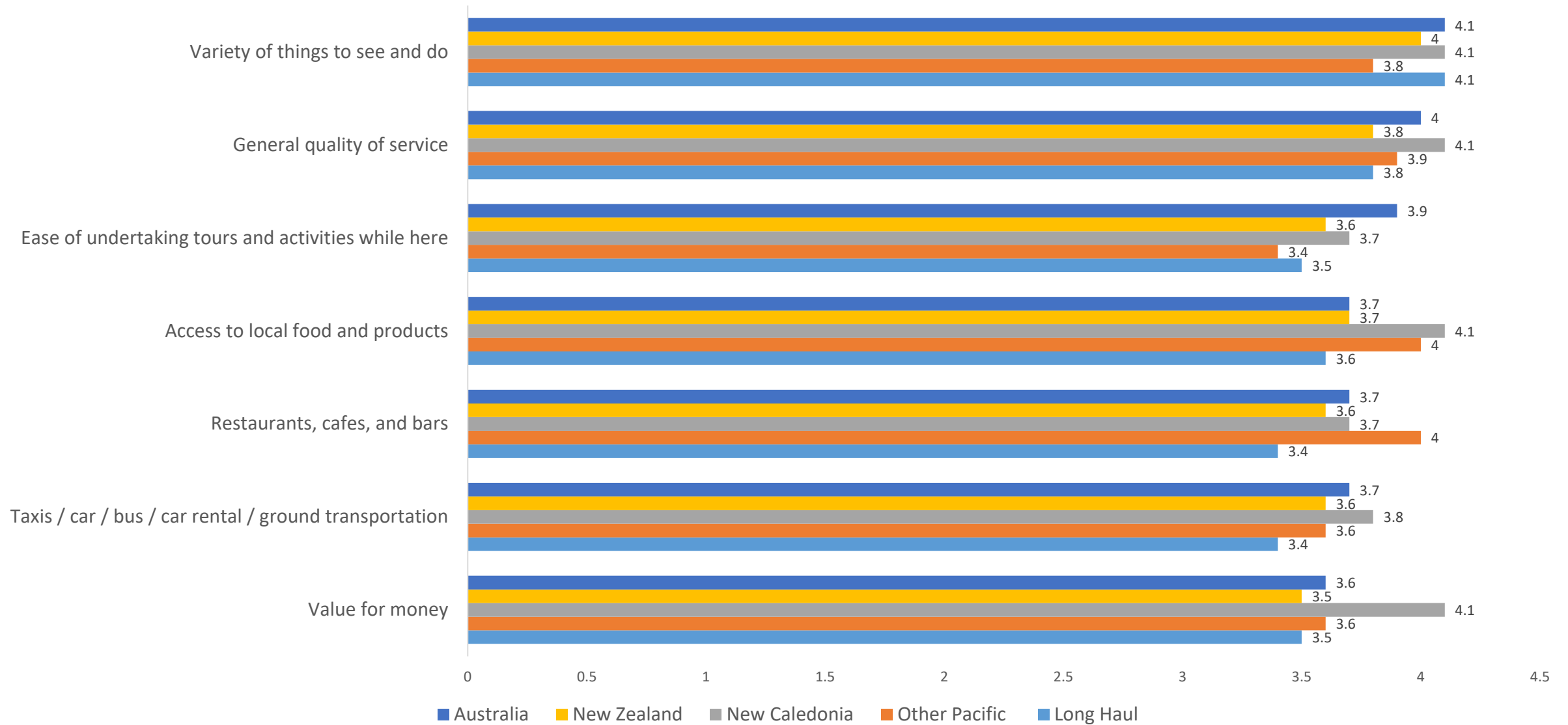
# Overall satisfaction



# Degree of Satisfaction – Total VS Holiday visitors

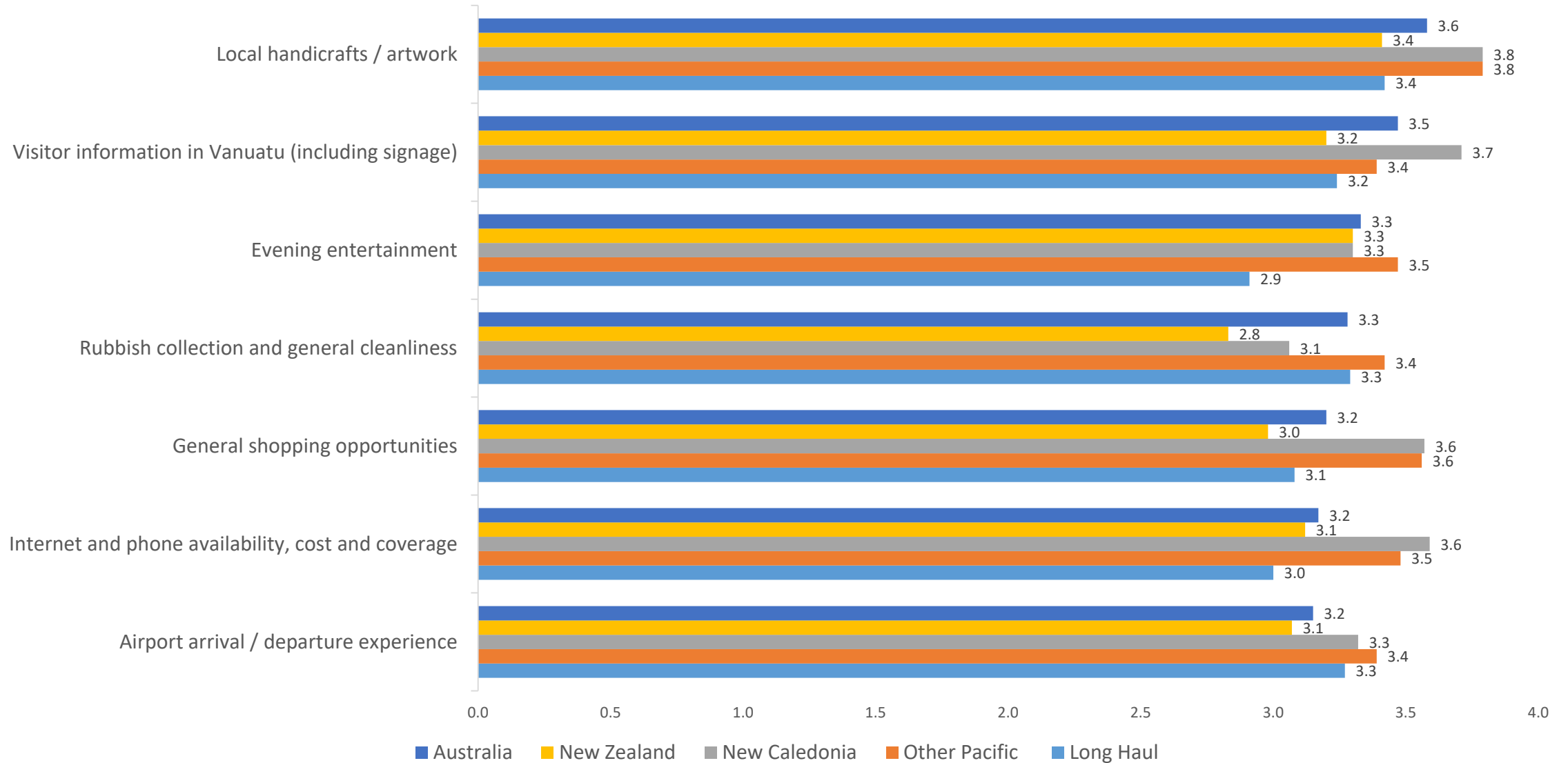


# Degree of satisfaction – Market

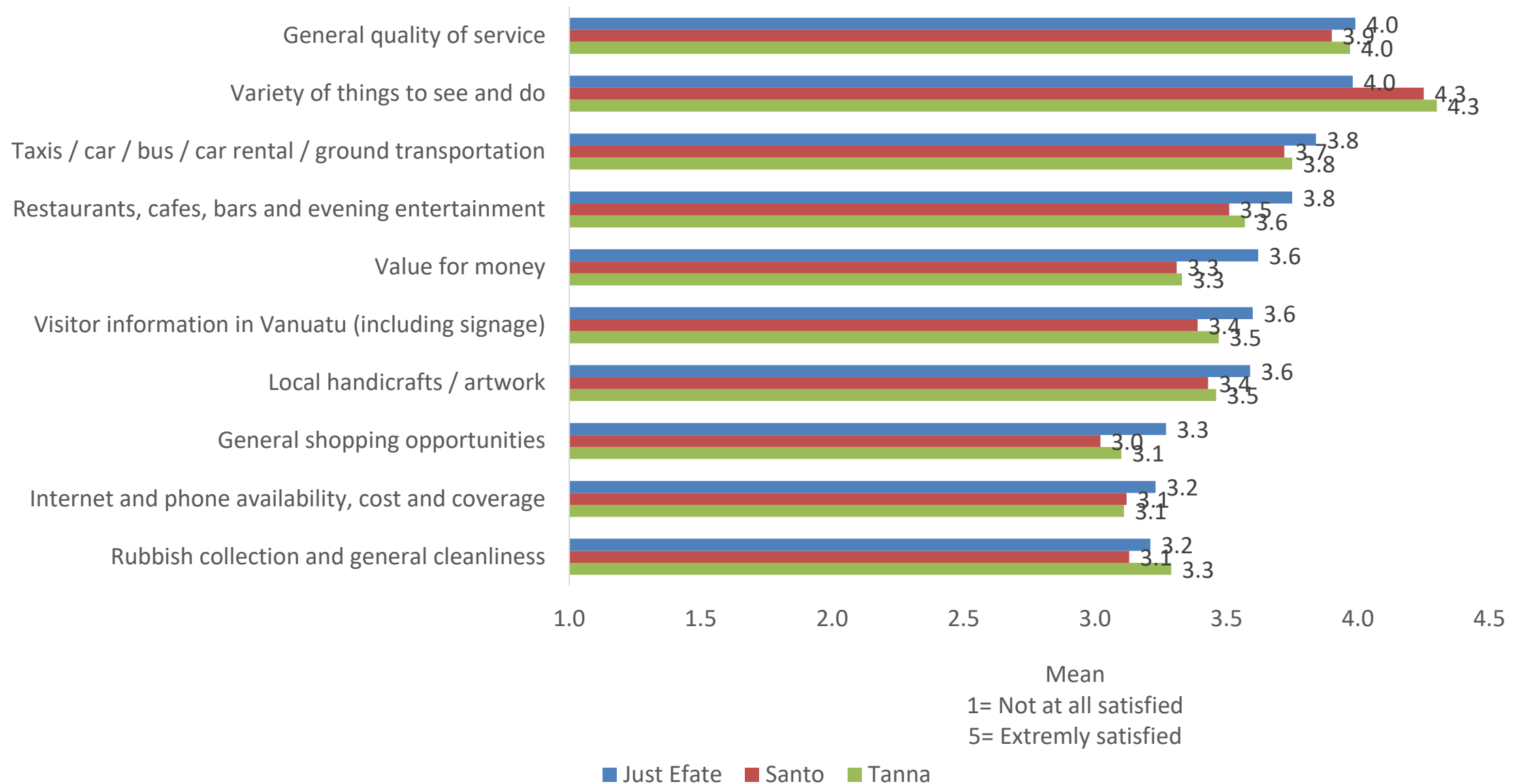




# Degree of satisfaction – Market



# Outer Islands: Degree of Satisfaction



# Most Appealing Aspects

Themes	Percent
Local people	50.5%
Environment	31.7%
Activities, attractions and entertainment events	28.7%
Atmosphere	13.3%
Culture and history	7.9%
Food and Beverage	6.5%
Accommodation	5.6%
Level of service	4.0%
Convenience	3.9%
Other	2.6%
Safety	1.9%
Uncommercial	1.9%
New Developments	1.5%
Overall good experience	1.5%
Value for money	1.3%

# Most Appealing Aspects of Vanuatu

“The people and their welcoming ways. And the fact that natural beauty and individuality of Vanuatu is still intact despite the high amount of tourism.”

“The friendly people who did not try to sell me anything on the street or pester me with offers of transport or other services. I liked the small population and the lack of sophisticated tourism.”

“The snorkelling is amazing. The coral is beautiful and there is more coral here than the other islands we have visited. The fish life is varied and abundant.”

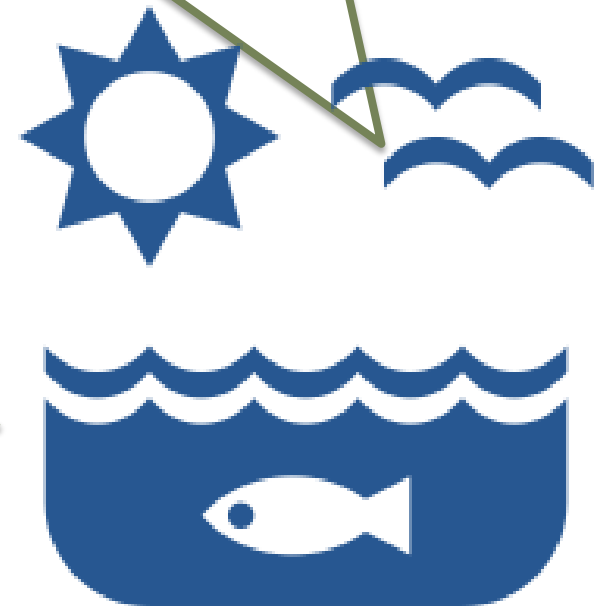


# Most Appealing Aspects of Vanuatu

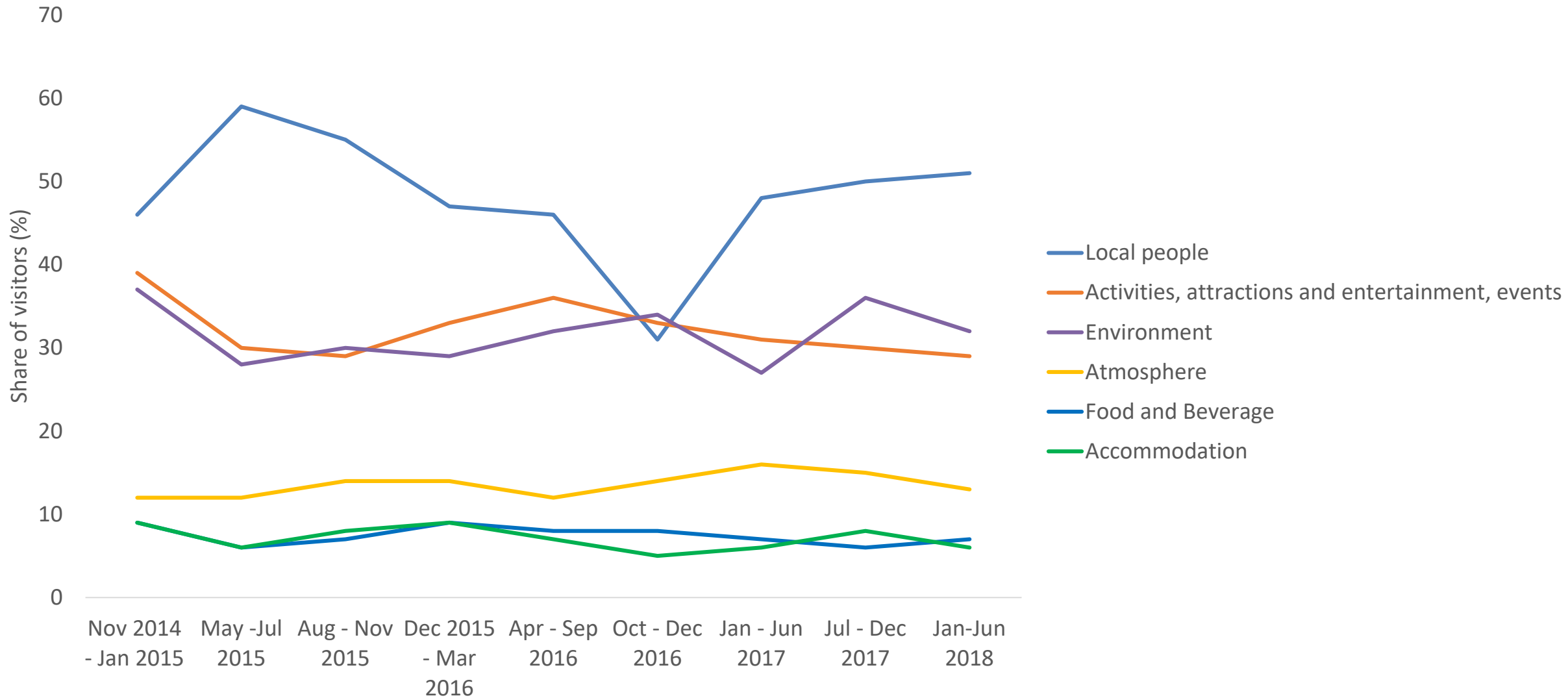
"water front development in town is great, a chance to meet and interact with locals and great access to handicrafts"

"Vanuatu really is the friendliest place I have been to. Everyone was so welcoming and it was a pleasure to be in such a beautiful spot. Vanuatu people are the most beautiful people in the world and how could they not be, surrounded by a world of beauty :)"

"The crystal clear sea waters. Loved that the water was blue and clear, exactly as the travel brochures showed. Plus the sea water was so warm, very inviting to swim. Vanuatu is a tropical paradise."



# Most appealing items



# Most Appealing Aspects - Santo

- Catching up with friends and undertaking local Ni-Vanuatu tours to the volcanoes in Ambrym and the Millenium Cave in **Santo**.
- I loved the happiness and quietness of Espiritu **Santo** especially within Barrier Beach Resort.
- I most enjoyed my time volunteering with Marine Reach on the ship Pacific Hope which brought us to do medical missions in Tesariki and Tasmate on the island of Espiritu **Santo**. The reason for this is I enjoyed the people so much as they were very friendly, grateful and generous.
- Lovely people, warm weather, swimming, snorkelling, exploring **Santo** and Aore Islands, playing golf in Santo. Did a snorkelling trip with Santo Island Fishing (not listed in previous question) by Fabrice Moderan who was a fantastic host. Santo Golf club is a gem and club members are very friendly. The course should be promoted for tourists to play.
- The wonderful people of Vanuatu, the beautiful weaving, the gorgeous beaches and snorkelling opportunities. Loved going to Espiritu **Santo** & going on a snorkelling trip with a local guide.

# Most Appealing Aspects -Tanna

- Access to active volcanoes and culture in **Tanna** & Ambrym traditional villages.
- Authentic cultural experience on **Tanna** -traditional dress & dance. Plus environment - volcano and rainforests.
- Beautiful friendly welcoming people proud of their history and culture. **Tanna** island volcano experience well managed amazing, welcome at base lovely. I can see that the new promenade and building for the market will be beautiful to walk along.
- Beautiful water and beautiful people. Loved seeing the volcano on **Tanna** and swimming in a blue cave.
- I volunteered as part of an organisation. Did not specifically choose to go there. **Tanna** Island was beautiful and the people were grateful for assistance.
- Tropical fish and corals, friendly relaxed people, natural beauty of **Tanna**.



Least Appealing Aspects	
Themes	Percent
Public services facilities and infrastructure	26.5%
Price of goods and services	16.6%
Rubbish cleanliness and natural environment care	14.8%
Food and beverage	9.4%
Social divide and social issues	8.3%
Local people, standard of service	8.2%
Attractions and activities	6.5%
Bus rental cars scooters or transport	5.1%
Shops and the shopping experience	4.9%
Accommodation	4.3%
Port Vila	4.0%
Weather	3.4%
Flight related issues	3.0%
Stray animals and mosquitos diseases	2.1%
Cruise ships	1.6%
Safety related issues	1.6%

# Least Appealing Aspects of Vanuatu

"We found it difficult to buy products made by people from Vanuatu (not made in China or from a shop owned by a Chinese person). It could be good to promote local shop owners/craft people to tourists to direct them away from spending money on the Chinese."



"Rubbish in the water: pollution going into water: the water is a very important resource for Vanuatu: need to keep it clean and healthy or all of those beautiful fish will disappear!"

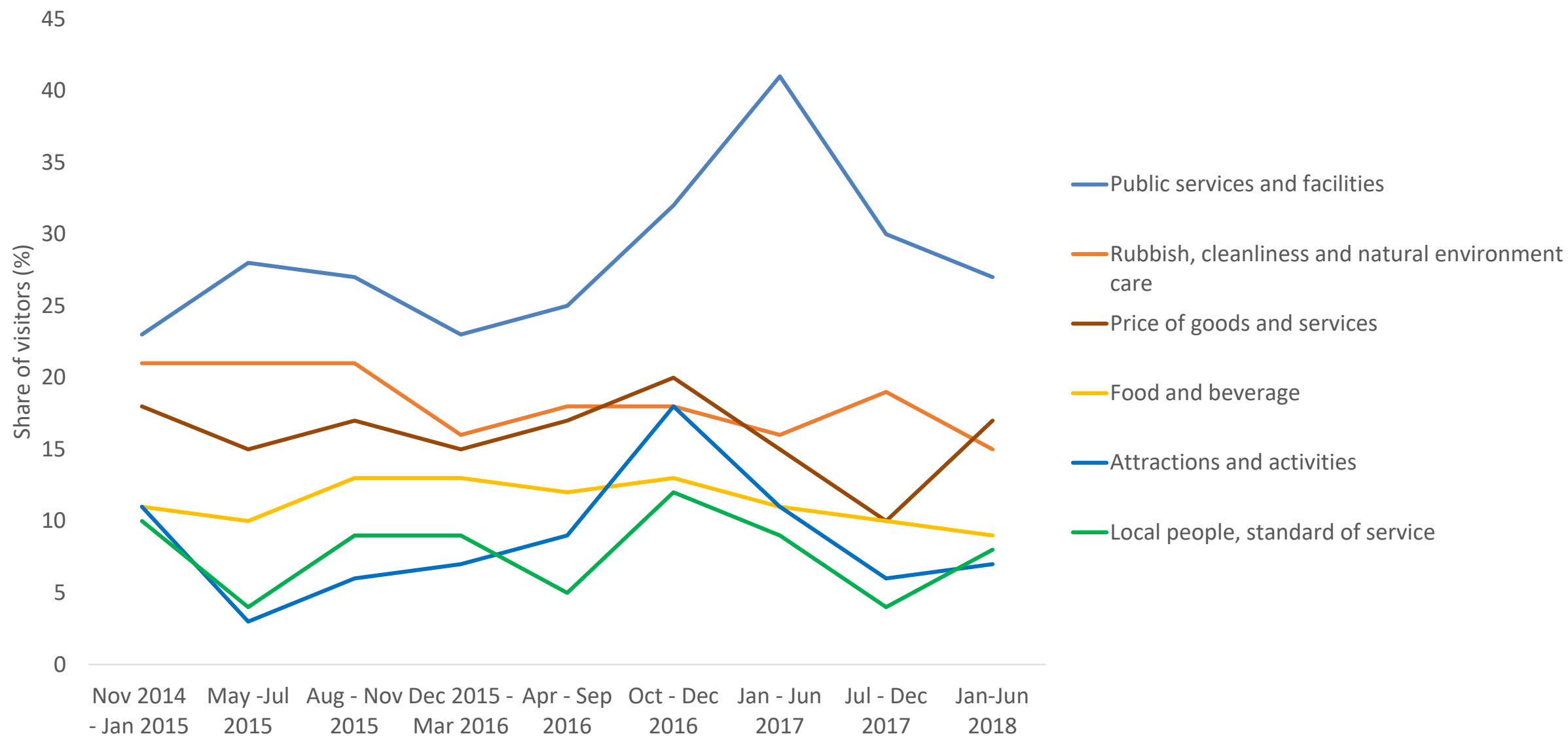
# Least Appealing Aspects of Vanuatu

“Air Vanuatu travel arrangements:  
Unexplained and disorganised  
cancellation of connecting flight  
Port Vila to Santo resulting in stay  
at Port Vila.”

“Lots of things were shut because we  
visited out of season, but we did not  
discover the problem until we had  
already arrived. There is not always up-  
to-date info saying whether attractions  
are open until you get there.”



# Least appealing items



# Least Appealing Aspects - Santo

- In **Santo** Spirito, the value for money was poor. Everything had add on costs.
- Lack of ability to fly more directly to and from **Santo**.
- The ambulance service is shocking. There is not much to do on **Santo** plus there needs to be more food etc delivered to the island as there was a shortage there. You could hardly get any food and it was so expensive to buy food there.
- The flight connections to get from Sydney to **Santo** meant we had to waste two nights of our holiday in Port Vila. It was a tiring and frustrating way to begin and end our holiday and would deter us from choosing Vanuatu for a future holiday. Better flight connections or better still more direct flights to **Santo** would be a good option. The lack of dining variety was a little annoying, and Vanuatu is a significantly more expensive destination than Bali and other SE Asian destinations.
- The infrastructure is not good. very few airline options into **Santo**. truly, finding flights to travel between islands is nearly impossible. like a jigsaw puzzle. transportation is lacking on the island. you can get taxi's but it's expensive; the islands need more buses.

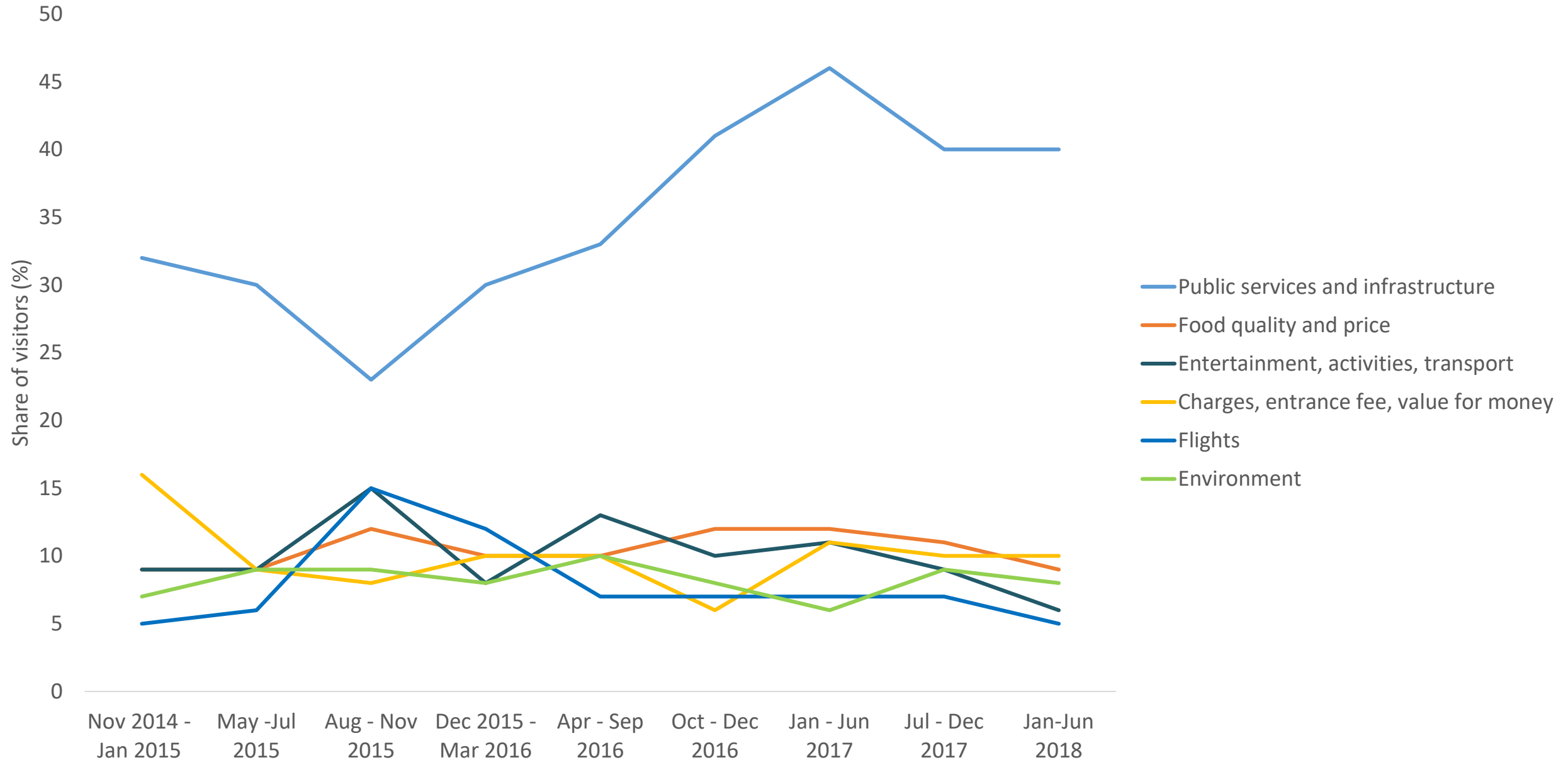
# Least Appealing Aspects - Tanna

- Airlines (air vanuatu) my intern flights were terrible and with big delays. Tour for the volcano is really expensive, services in **Tanna** as well. Too much (mais reason).
- Nothing much apart from road work in **Tanna** island which could potentially damage the environment and possibly local people's culture because many tourists will make the place uncomfortable.
- Shops filled with Chinese junk, very little local craft, tried everywhere to find copy of the film **Tanna** but could not even though it was being promoted on Air Vanuatu.
- Some experiences were very expensive particularly on **Tanna** where we found we had less options to find cheaper items for food etc.
- The conditions of the roads. In **Tanna** Island they are seriously inhibiting your industry as well as hospitality. Even unsealed roads can be graded and sealed roads should be open not littered with tree stumps to prevent drivers using them.
- The lack of public transport on **Tanna**; private cars are very expensive for solo travellers. The tours are also very pricey overall on both Efate and **Tanna**, not value for money compared to Indonesia and other South Asian countries.

# Suggestions for Improvement

Themes	Percent
Public services and infrastructure	39.7%
Charges entrance fee value for money	10.3%
Food quality and price	10.3%
Environment (cleanness rubbish nature)	9.1%
Entertainment activities transport	7.6%
Local people, standards of service	6.2%
Flight related issues	4.9%
Accommodation	4.6%
Shopping experience	3.8%
Social issues	3.8%
Weather	2.8%
Safety	1.3%

# Suggestions for improvement





# Improvement - Santo

- Better flight connection to Espiritu Santo.
- Better low-cost travelling infrastructure, possibility of using public buses on Santo.
- Better managed airport at Santo . Beautify the main street of Santo . Plant trees and toilet need to be signed and kept clean.
- In Santo and Tanna: more affordable restaurant, public transport with fixed price. Inform local that white people is not equal to rich people. we are young travellers are we were really surprise by the relationship with local, the relation was not true and related to money. It's not normal to pay also for everything eg: beaches. it's a shame because it is a beautiful place. Price for volcano it's unbelievable! too expensive.
- More ability on Santo to get around independently without the way too high costs for hiring a vehicle. Getting taxis and tour drivers to take you everywhere is both expensive and creates issues with timing pressure.
- probably more entertainment to tourist, more activities for them in Santo.

# Improvement - Tanna

- A reminder when you get on a plane to **Tanna** that there are no money machines there.
- Air Vanuatu should be more punctual, cheaper food, tours on **Tanna** need improvement (they are unauthentic).
- Almost everything. Reliable transport, Currency exchange agencies open for flights. Facilities on **Tanna** (EFTPOS) & roads.
- Better accommodation in **Tanna** more developed options.
- Better communication about domestic flights, better flight availability (e.g. able to fly direct between Santo and **Tanna**, or get a connecting flight the same day.
- It was quite difficult finding information (before we left home) about the tours of the **Tanna** volcano. Our tour all worked out well but we didn't really know how it was going to work out. The toilet facilities at the base of the volcano are woeful and sum of the money we all paid for the tour could well be spent improving those.
- More affordable phone access especially working as a volunteer remotely on **Tanna**.
- The **Tanna** Volcano tour was extremely limited in options, and seemed to only cater to old cruise ship people. No hiking options, camping, local tour guides, nothing. Extremely expensive as well. Needs to be changed before the privatized owner over develop it.

# Supporting decision making in:

## 1. Destination marketing

- What are the top five insights you have gained?
- What challenges face you in reaching the Australian market?
- What challenges face you in reaching the Chinese market?
- What marketing platforms work best and for whom?
- Should yield be the focus for marketing?

# Supporting decision making in:

## 2. Product/experience development

- What are the top five insights you have gained?
- What products perform well and what are the weak links in the chain?
- Where does the potential for product development lie? (including HR/training)
- How do product development needs differ for long and short haul markets?
- Should product development be guided by yield?

# Supporting decision making in:

## 3. Investment prioritization and guidance

- What are the top five insights you have gained?
- Where does new investment need to be encouraged?
- What data will the investor place most value on?
- What advice would you give a small local investor wanting to develop a small village based cultural experience?

# Supporting decision making in:

## 4. Broader Planning and Strategy for Sustainable Development

- What are the top five insights you have gained?
- What are the key areas that need to be developed to enhance visitor satisfaction?
- What indicators can be developed from the IVS data
- Are there challenges in balancing cruise and air based markets?

# Supporting decision making in:

## 5. Outer Island development

- What are the top five insights you have gained?
- What challenges are stopping visitors from engaging in more outer island tourism?
- What opportunities are there to grow visitor yield and satisfaction?
- Which markets and types of visitors are best suited to outer island experiences?
- What advice would you provide a local person looking to set up a cultural experience/accommodation?

# Supporting decision making in:

## 6. Research and insight

- What are the top five insights you have gained?
- How can we grow IVS response rates? Any new ideas?
- What areas of data mining should we be developing further?
- Are there opportunities for additional survey development?



## ACCESSIBILITY

# Understanding the Vanuatu 70+ Tourist Market

## Accessibility

## Data mining report

Vanuatu welcomes everyone to visit, regardless of age or ability. Port Vila's beautiful new seafront is fully accessible and includes public toilets which are accessible to all.

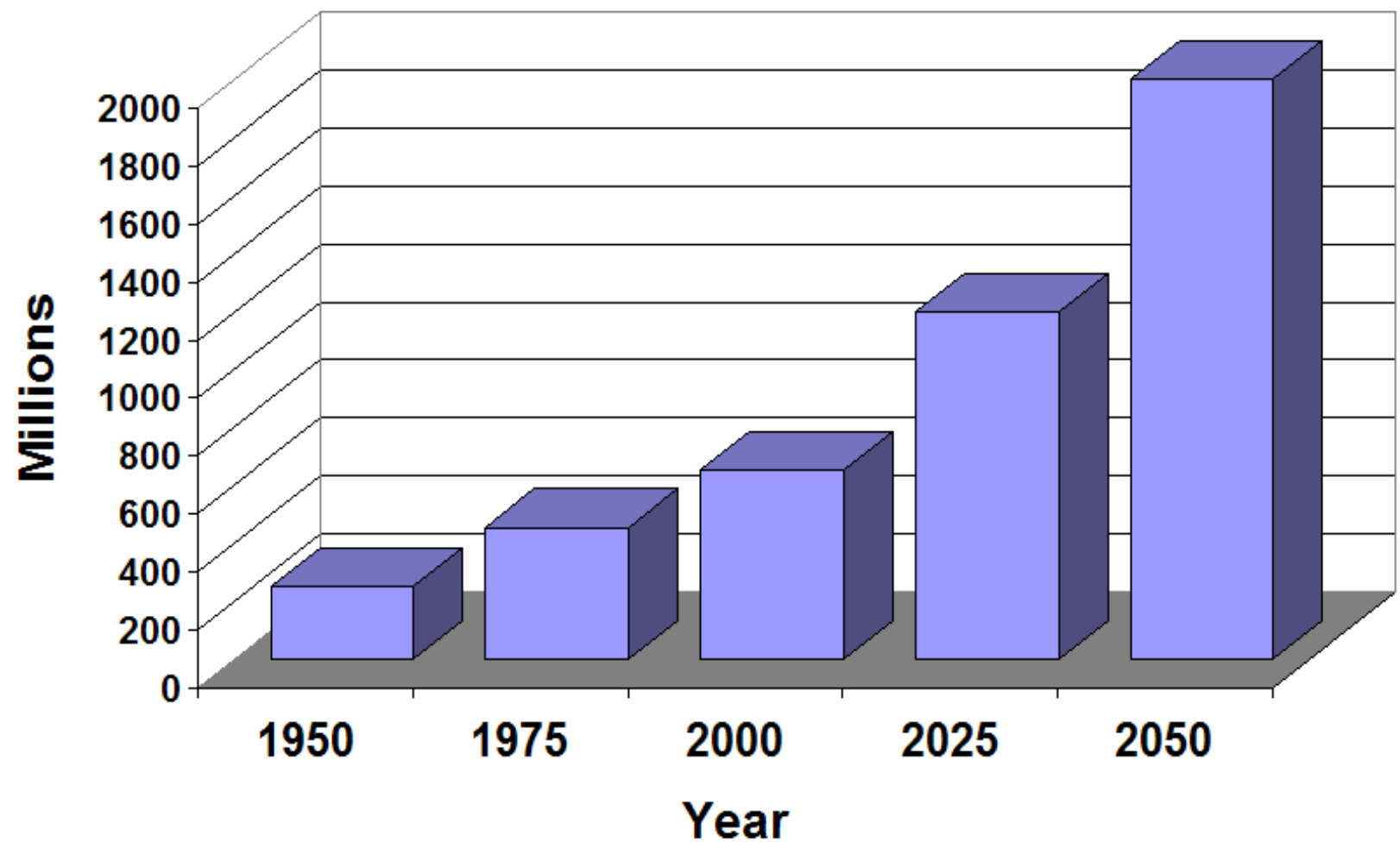
Several hotels and resorts in Port Vila and Luganville have accessible facilities, which enable guests with young children, older visitors, and people with disabilities to enjoy a safe and comfortable Vanuatu holiday.

November 2018

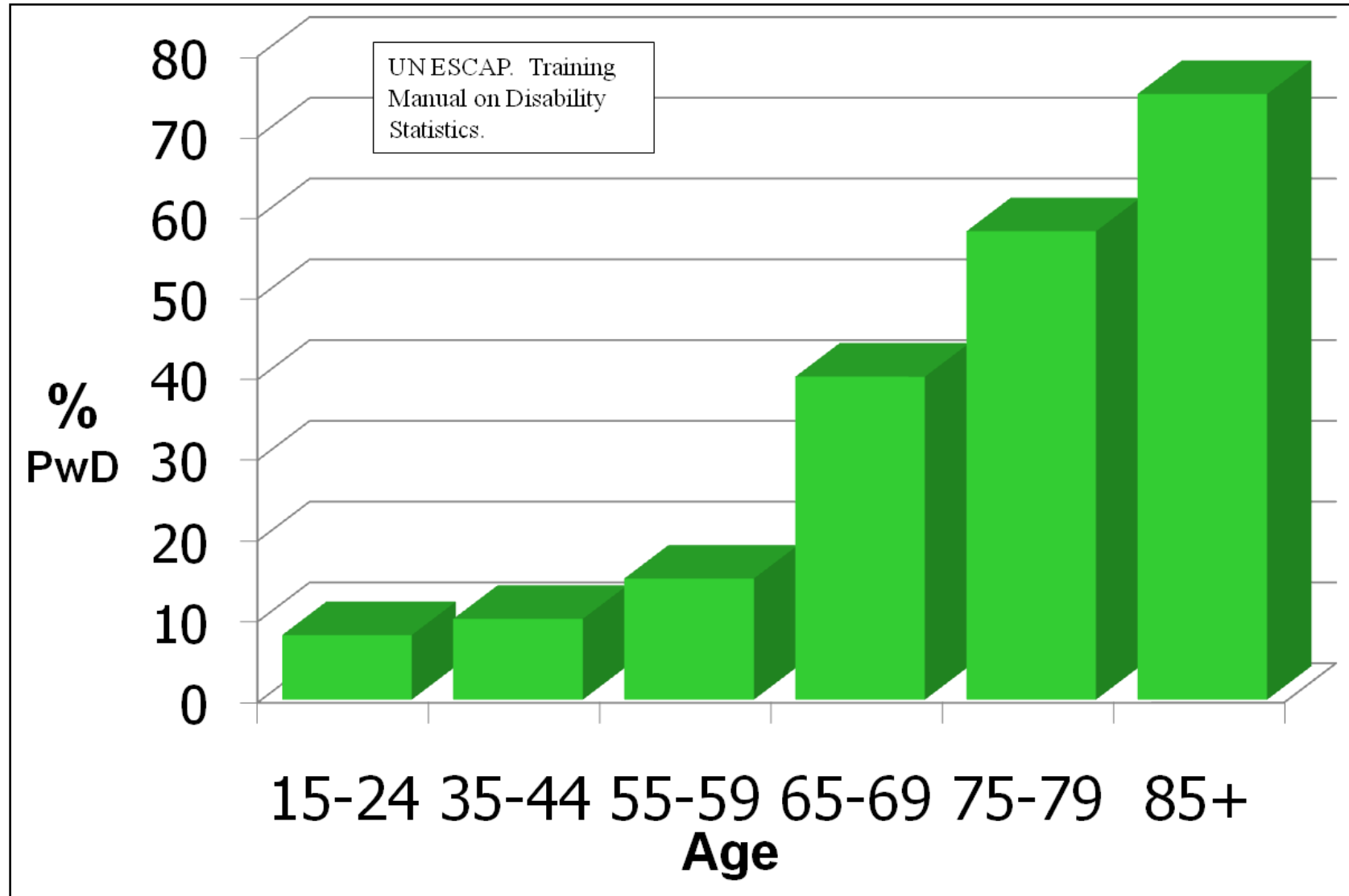
Milne, S., and Li, S.



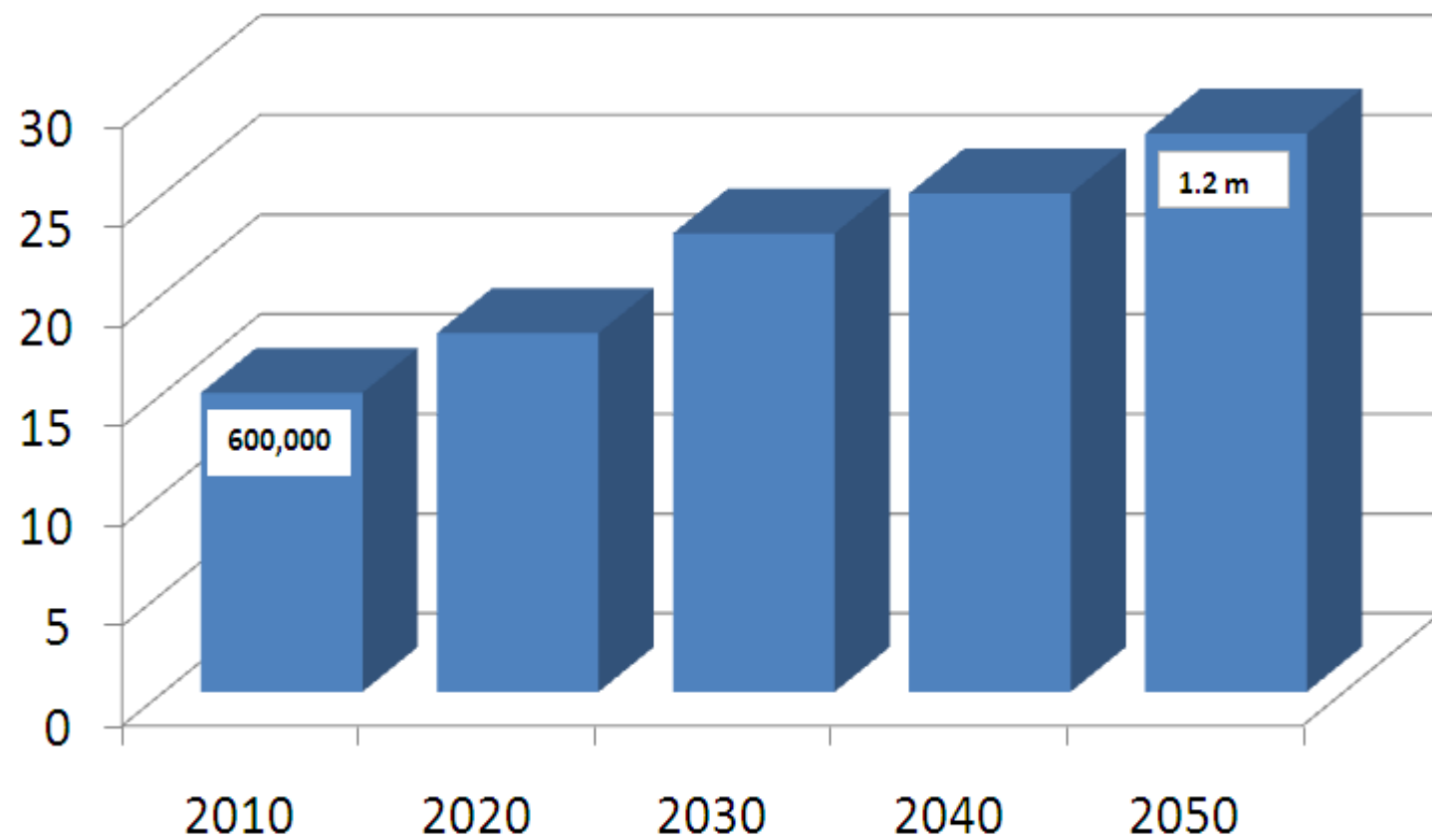
# World Population 60 or Older



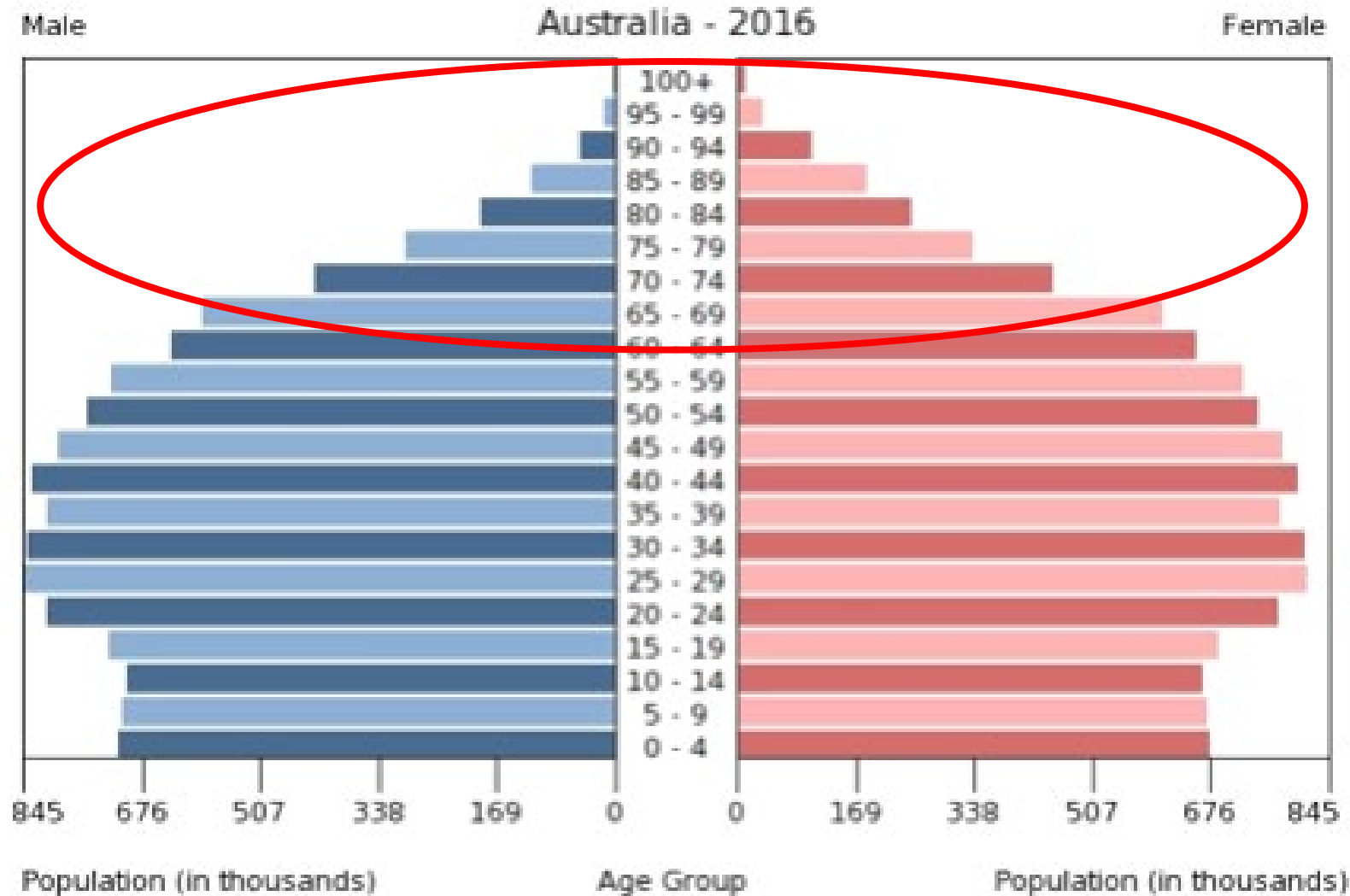
# Percentage of People with Disability by Age Group



## % of the NZ Population Over 65



# Aging Population in Australia



**3.8 million**

Australians (15% of the population) are aged 65 and over in 2017

Source: Australian Bureau of Statistics,  
Australian Institute of Health and Welfare

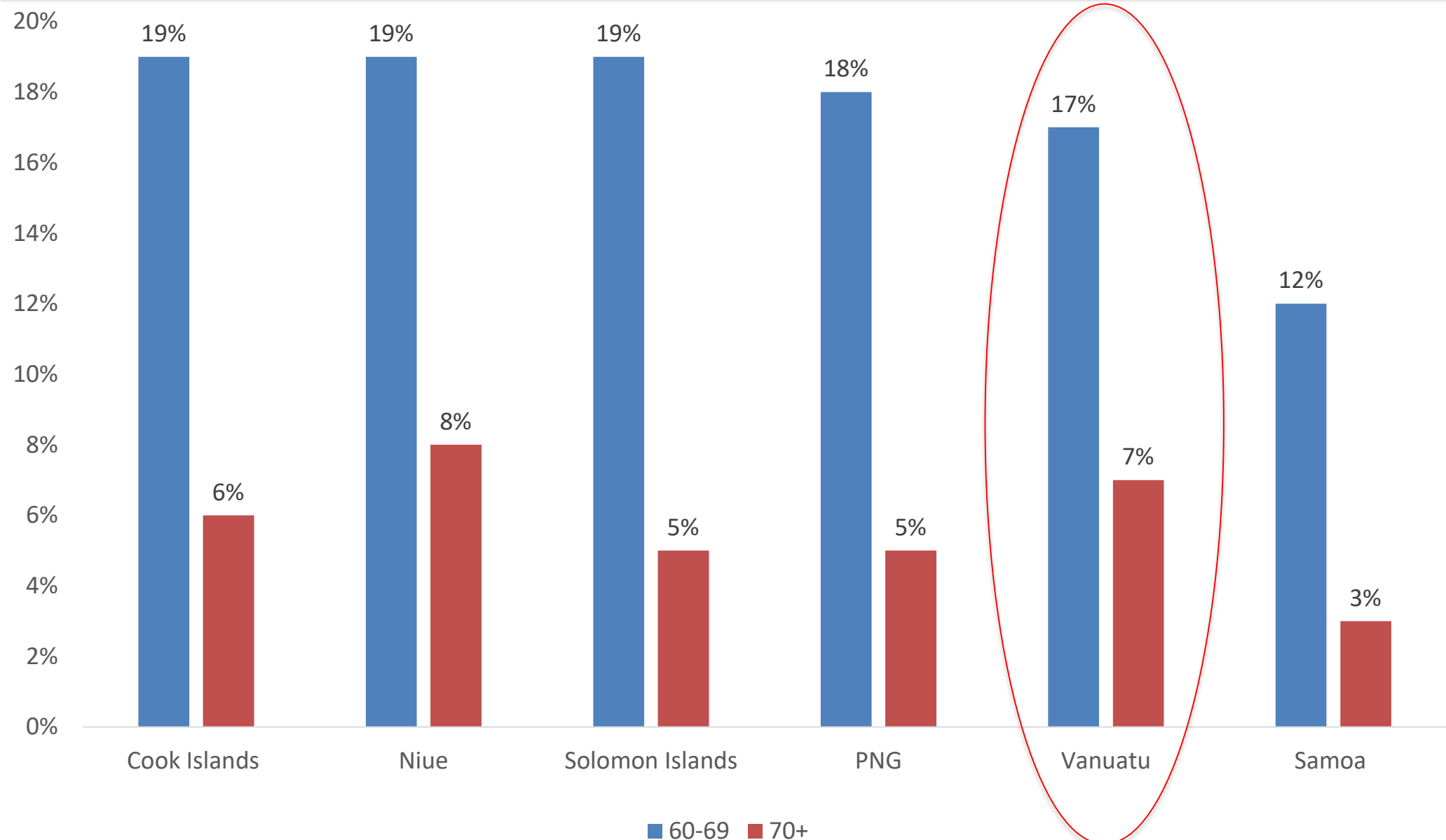
# **THE VANUATU CONTEXT**

**HOLIDAY VISITORS 70+ years vs ALL HOLIDAY  
VISITORS (excluding the 70+ market)**

**ALL VISITORS 70 + years vs ALL VISITORS (excluding  
the 70+ market)**

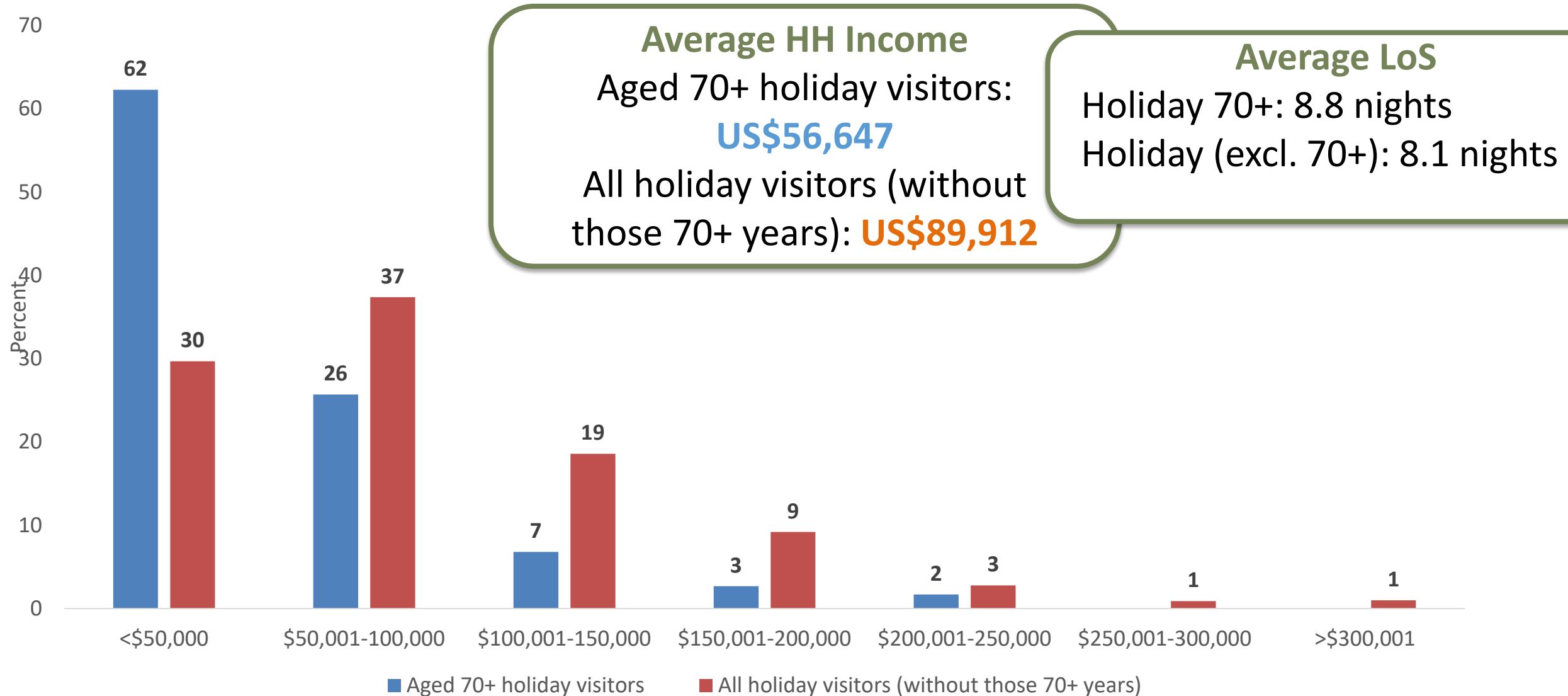
**(Data Mining from IVS 2015-2017/2018)**

# Pacific Island Countries: Air Visitors AGED 60+/70+



Cook Islands	Jul 2017 to Jun 2018
Samoa	Jan to Jun 2018
Niue	Oct 2017 to Sep 2018
Solomon Islands	Oct 2017 to Jun 2018
PNG	Jan to Jun 2018
Vanuatu	Jan to Jun 2018

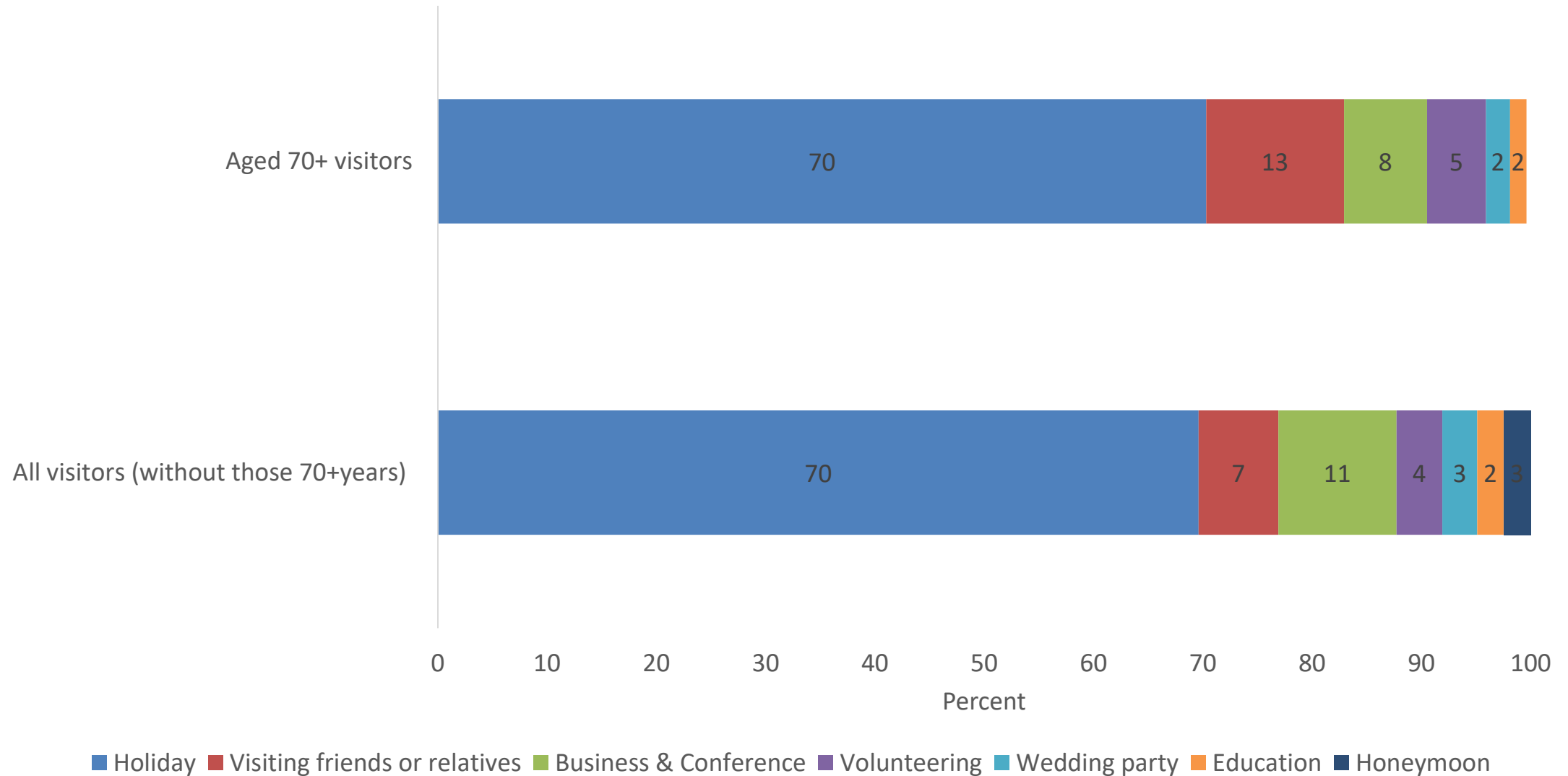
# Holiday Visitors - Household Income and Length of Stay.....



*Note: The analysis is based on data from Jan 2015 – Dec 2017*

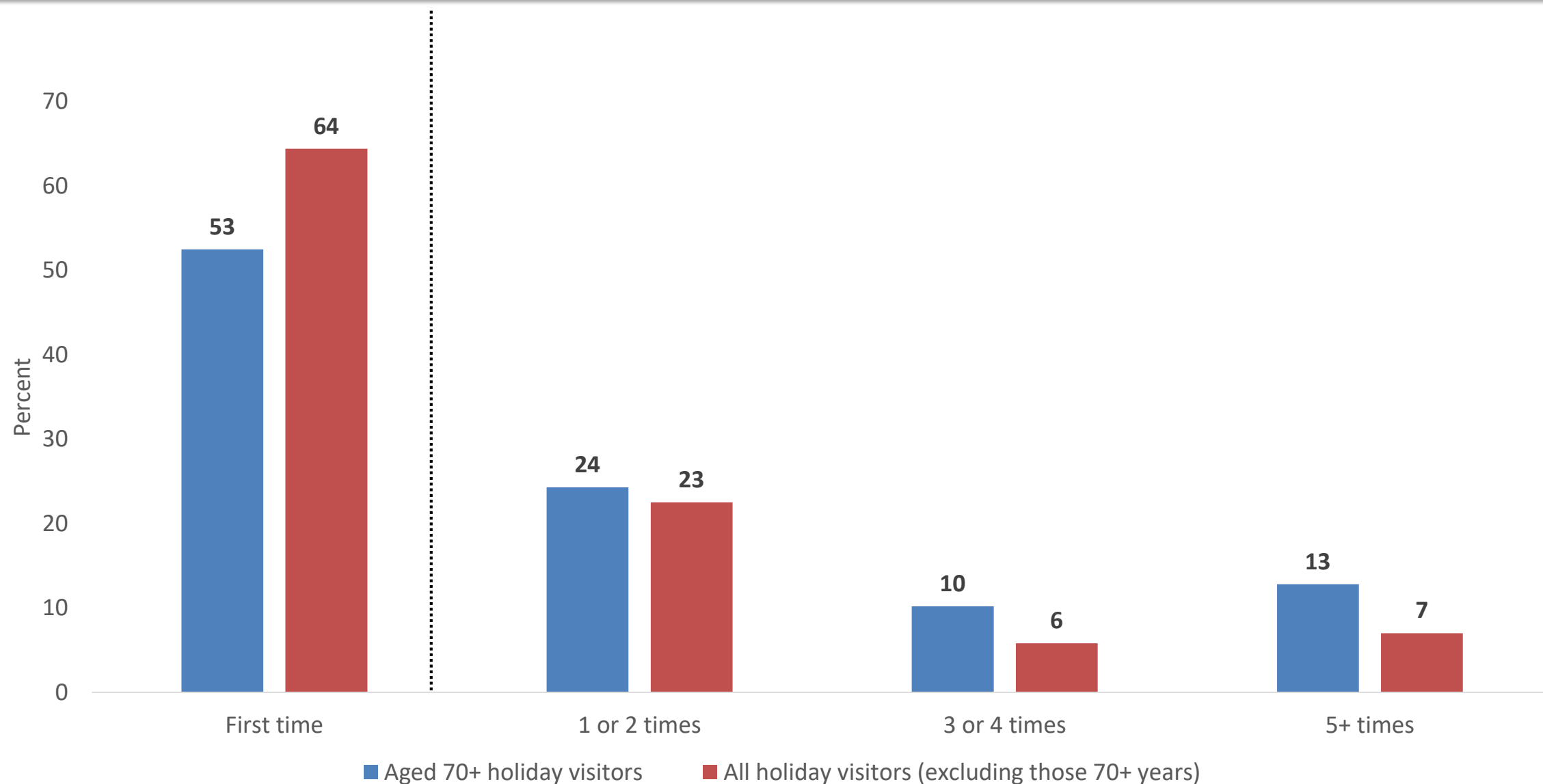


# Main Purpose of Visit



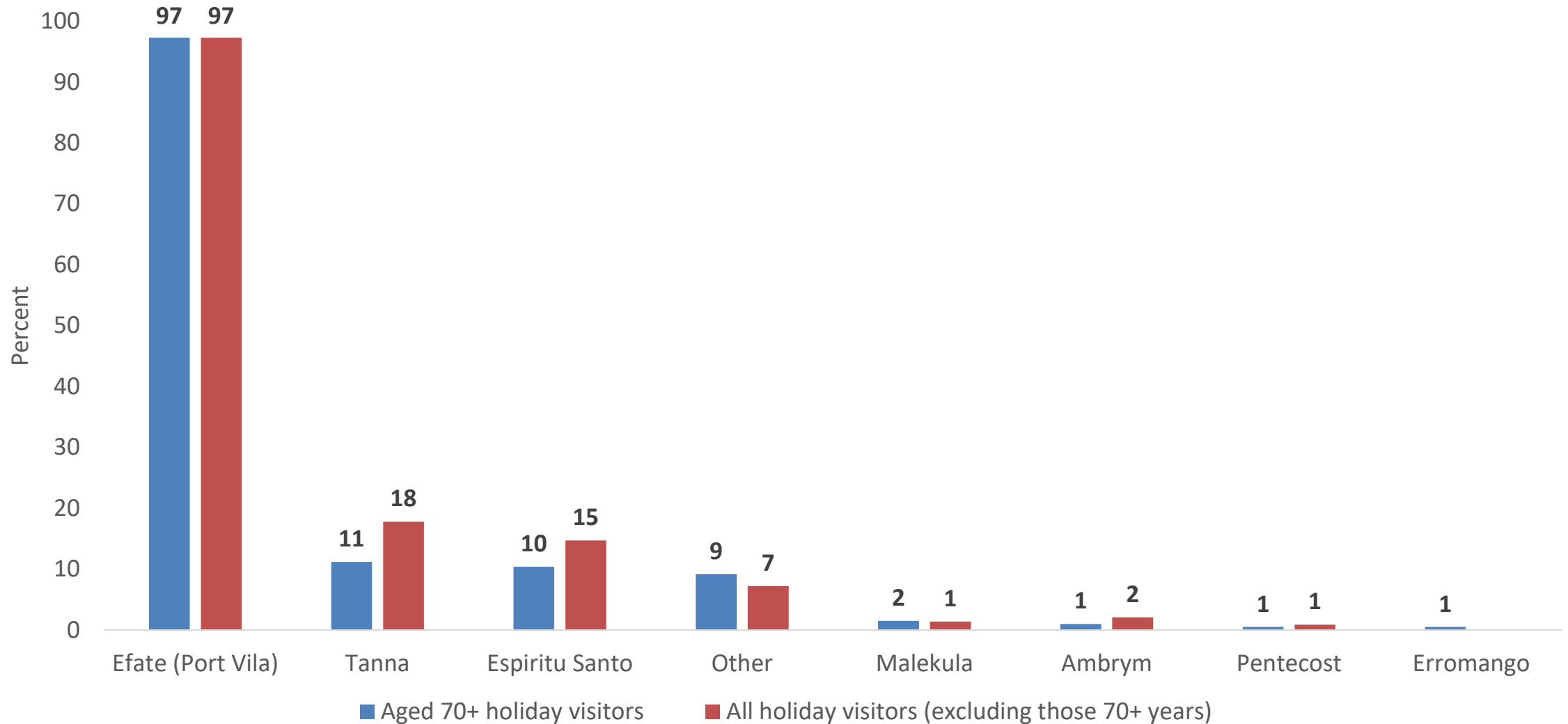
*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Previous Visits – holiday visitors



*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Outer Islands Visited – Holiday visitors

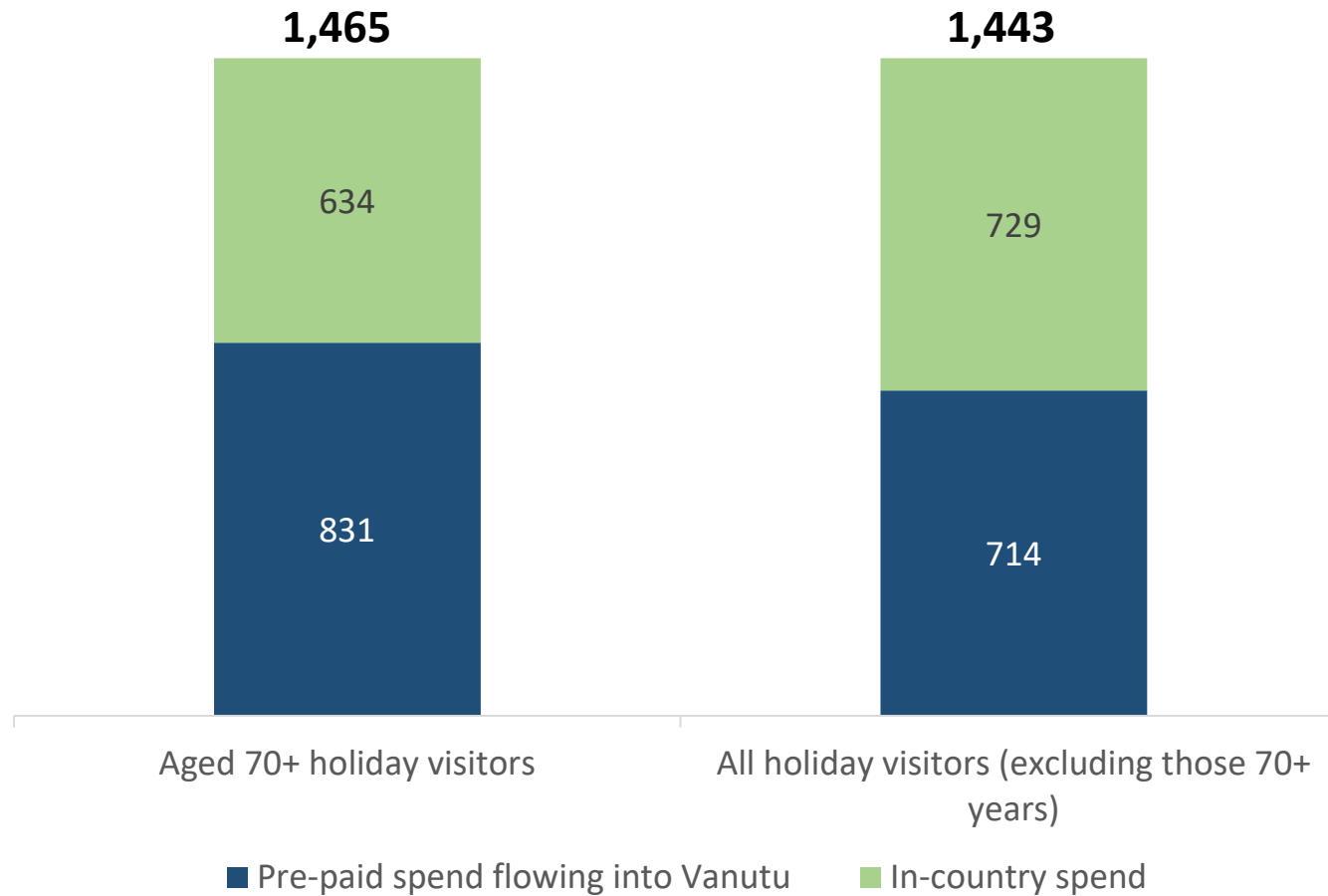


*Note: Multiple responses, therefore total does not add up to 100%*

*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Expenditure by Market – holiday visitors

## PER PERSON PER VISIT



*Note: The analysis is based on data from Jan 2015 – Dec 2017*

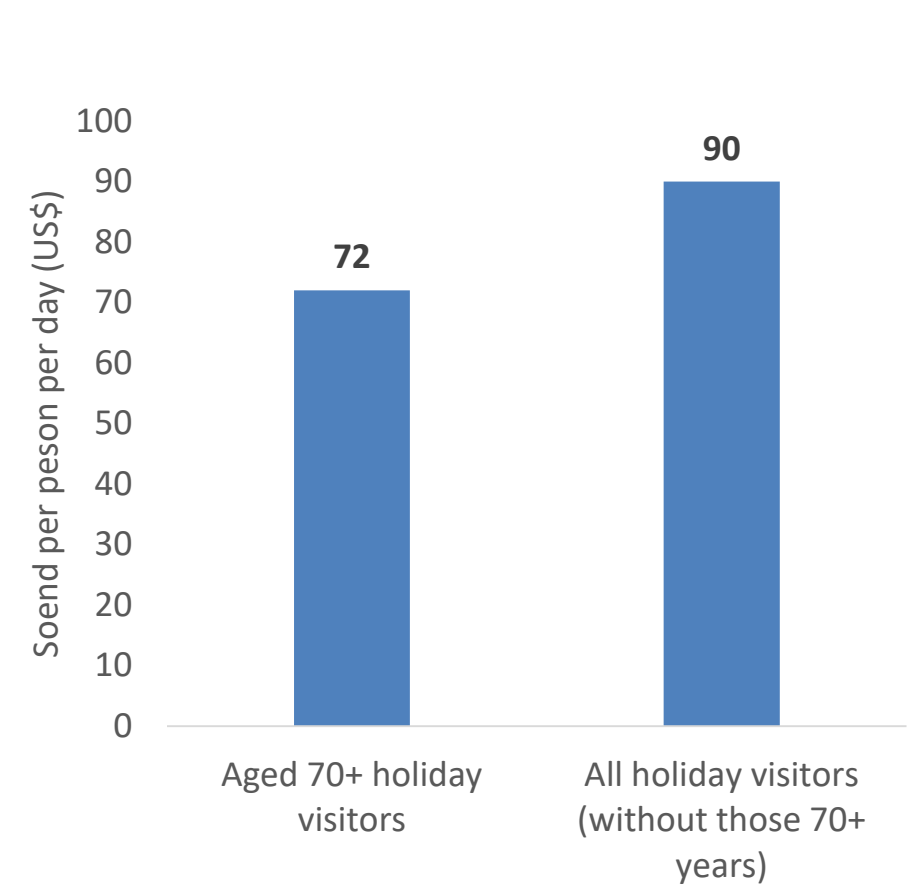
# Expenditure by Market

Covering people	n=1,168	n=913	n=23,163	n=20,090
Markets	Aged 70+ visitors	Aged 70+ holiday visitors	All visitors (excluding those 70+ years)	All holiday visitors (excluding those 70+ years)
62.5% pre-paid expenditure(US\$)	831	831	714	714
In-country spend(US\$)	651	634	739	729
Total spend (US\$)	1482	1465	1453	1443

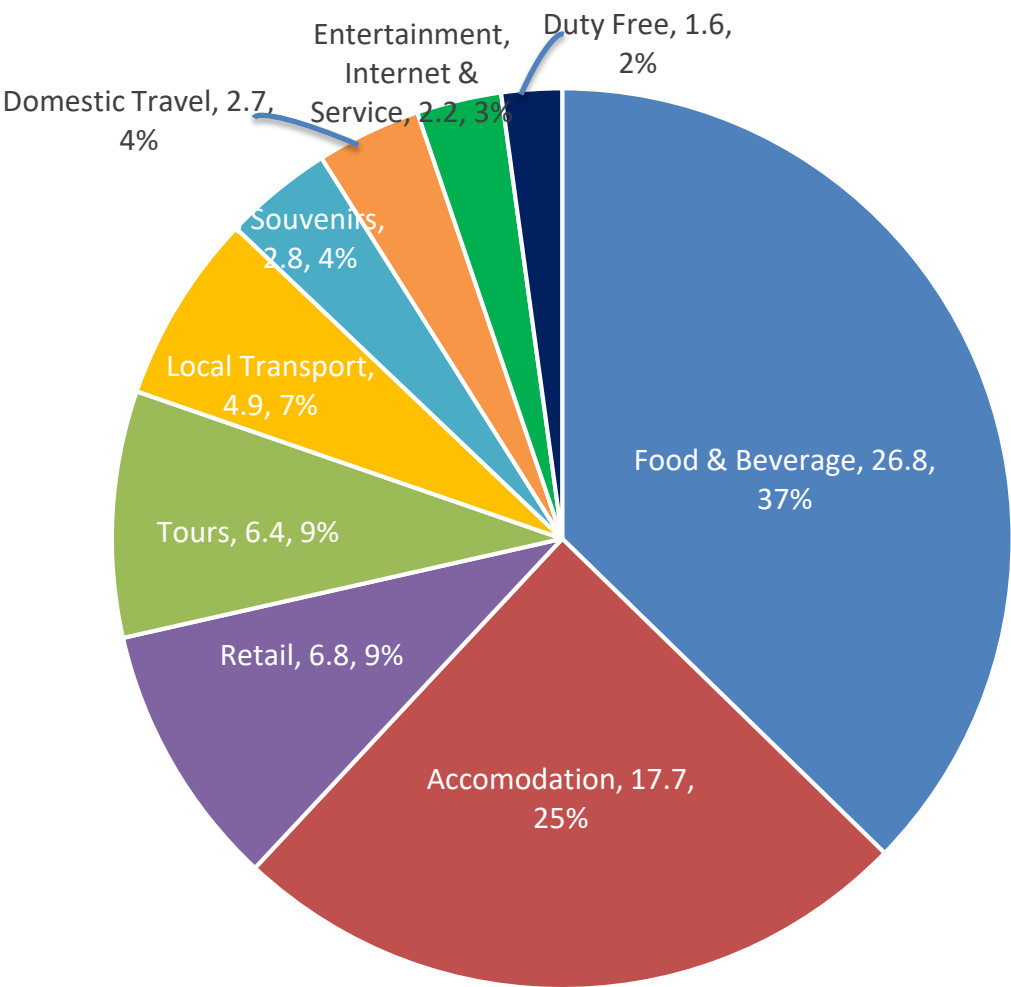
*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Average Spend while in Vanuatu per day – holiday visitors

## PER PERSON PER DAY



## Aged 70+ holiday visitors \$72 per day



Note: The analysis is based on data from Jan 2015 – Dec 2017

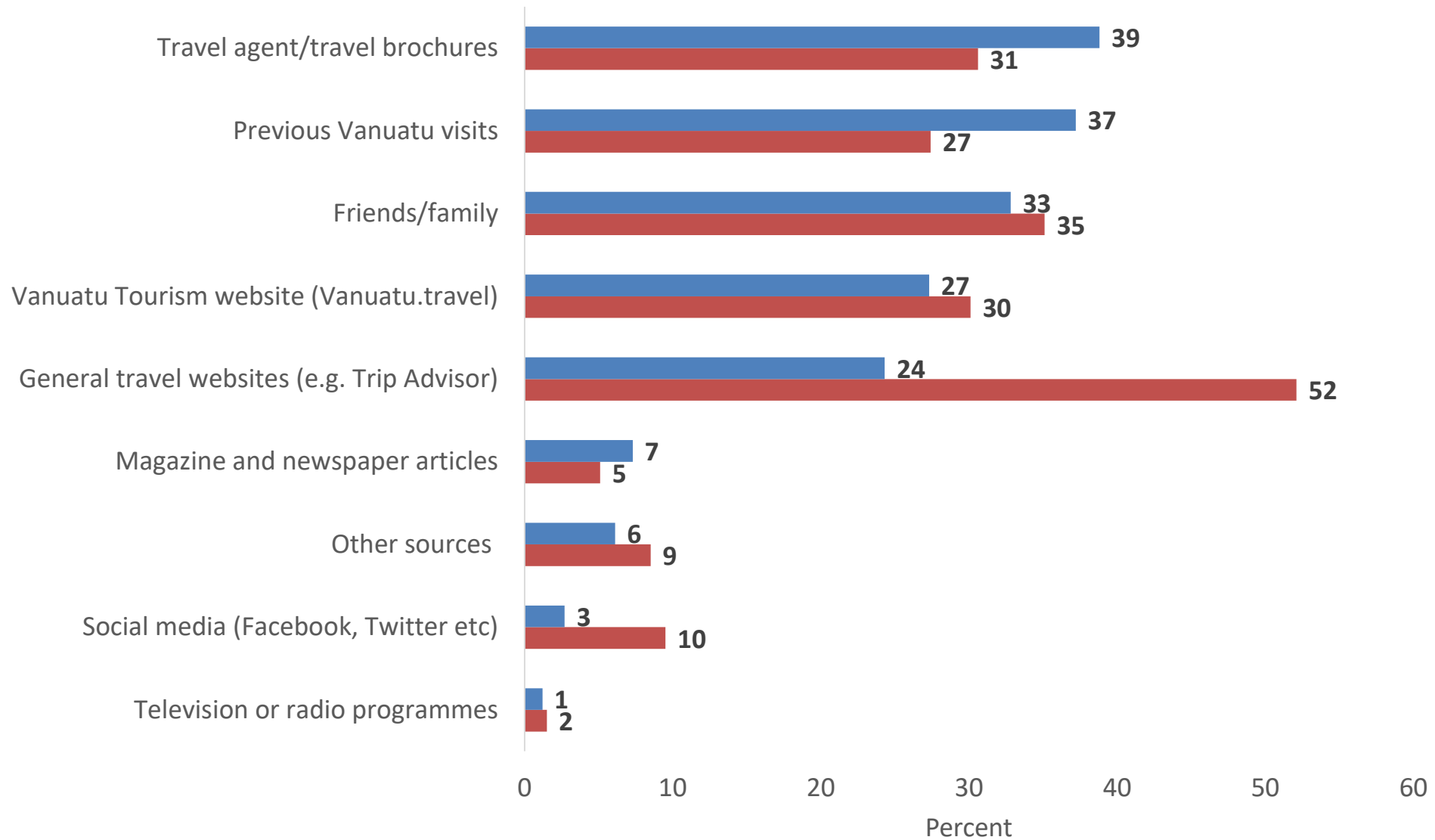
# Influences on the decision to choose Vanuatu – holiday visitors

## Influences on the decision to choose Vanuatu (score out of 5)

Aged 70+ holiday visitors	Quiet and relaxing atmosphere <b>3.8</b>	Accessible 3.7	Affordable 3.6	Culture and history 3.4
All holiday visitors (excluding those 70+ years)	Quiet and relaxing atmosphere <b>3.9</b>	Beaches and swimming 3.7	Accessible 3.6	Nature attractions / volcano / eco tourism / photography 3.5

*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Sources of information used for trip planning - holiday visitors



■ Aged 70+ holiday visitors

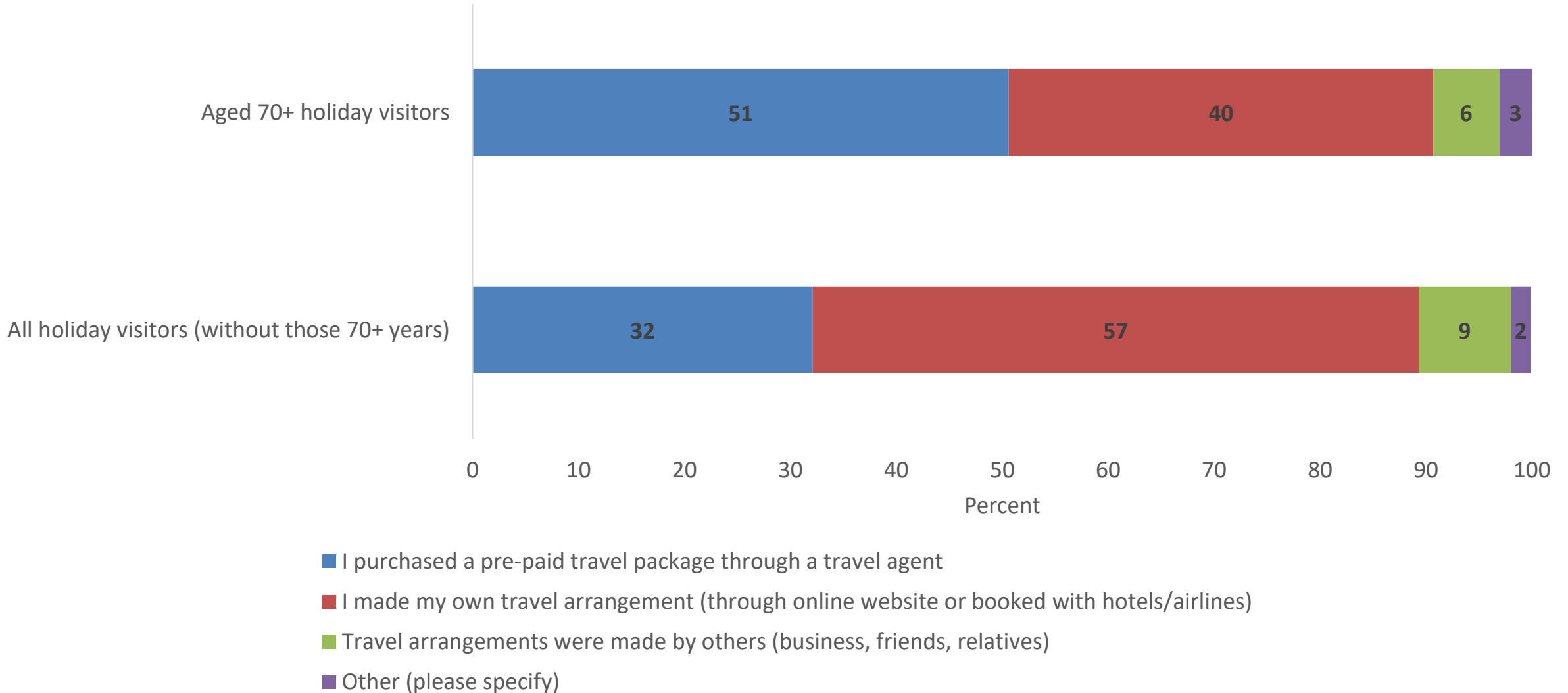
■ All holiday visitors (without those 70+ years)

*Note: The analysis is based on data from Jan 2015 – Dec 2017*

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



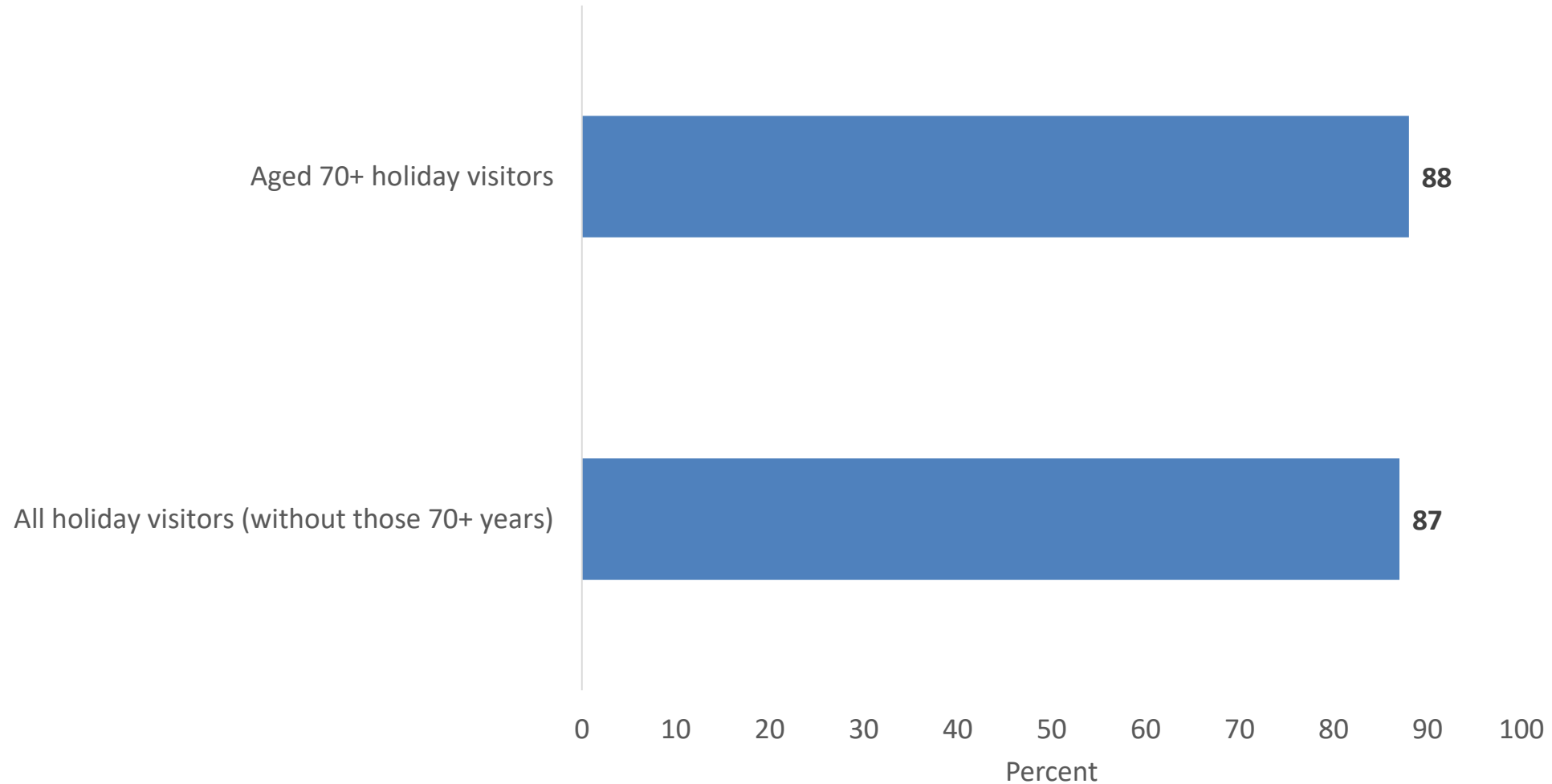
# Travel Purchasing Behaviour – holiday visitors



*Note: The analysis is based on data from Jan 2015 – Dec 2017*

# Visitor Satisfaction - holiday visitors

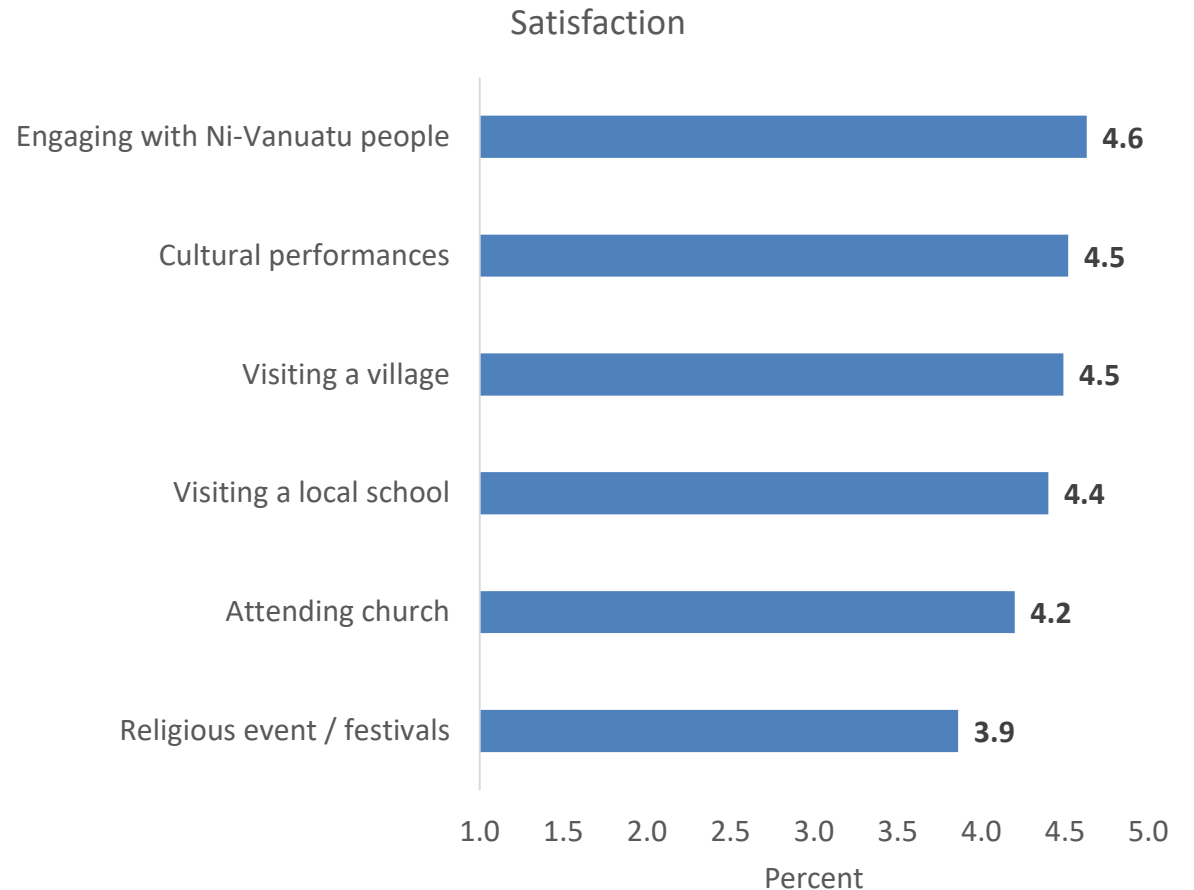
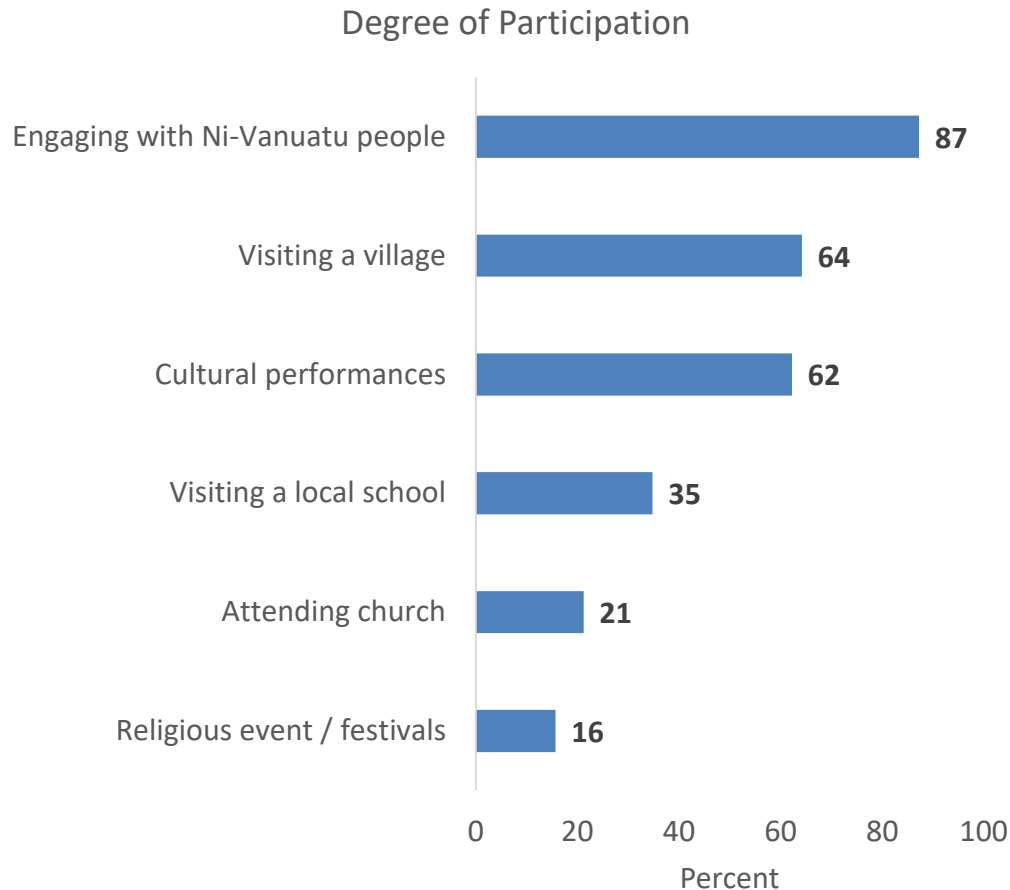
## Overall Satisfaction\*



*Note: The analysis is based on data from Jan 2015 – Dec 2017*

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

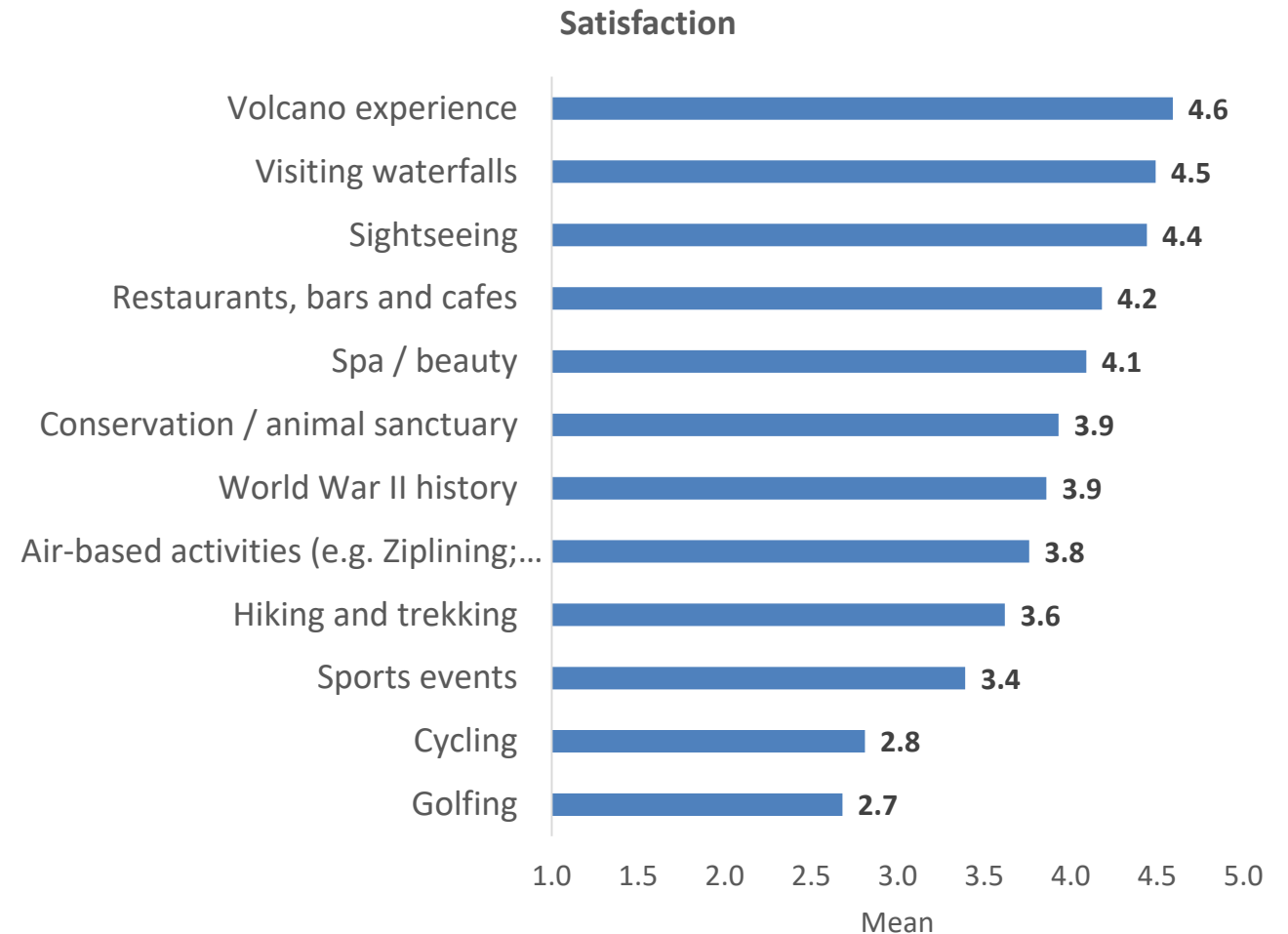
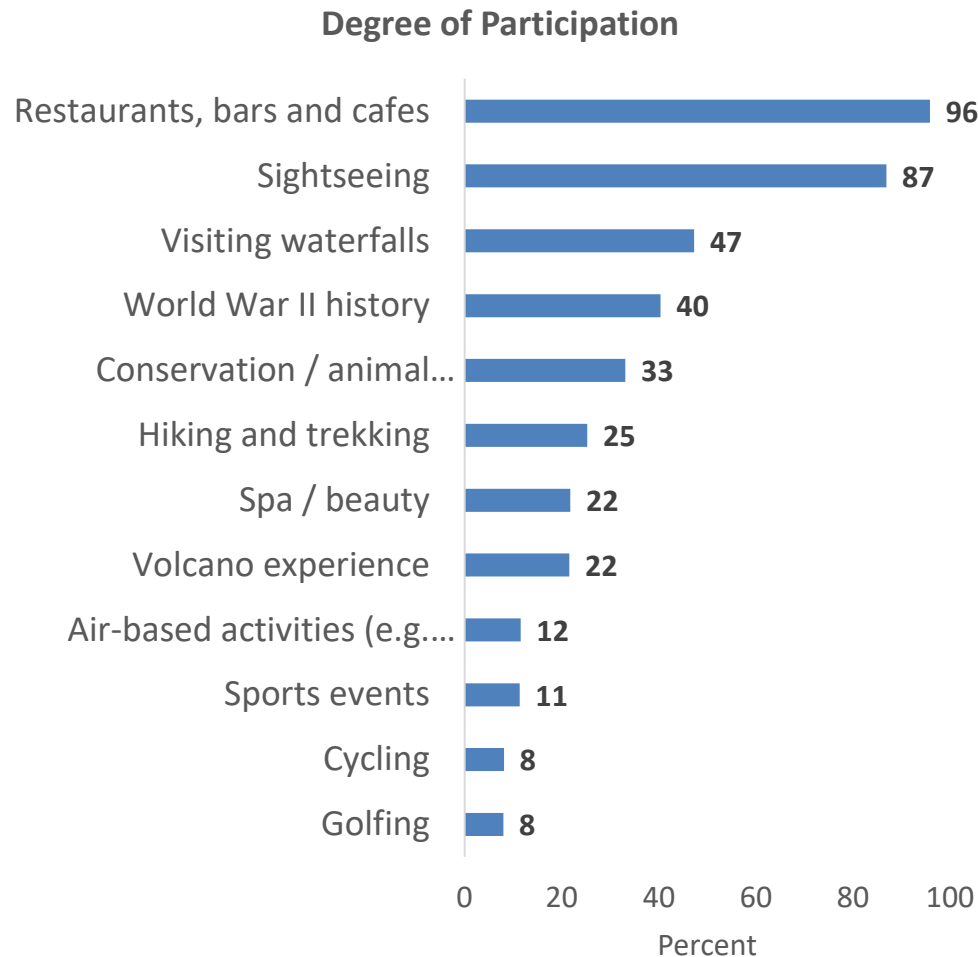
# Aged 70+ holiday visitors – Cultural Interaction Activities



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

*Note: The analysis is based on data from Jan – Jun 2018*

# Aged 70+ Land Based Activities and Touring – all visitors

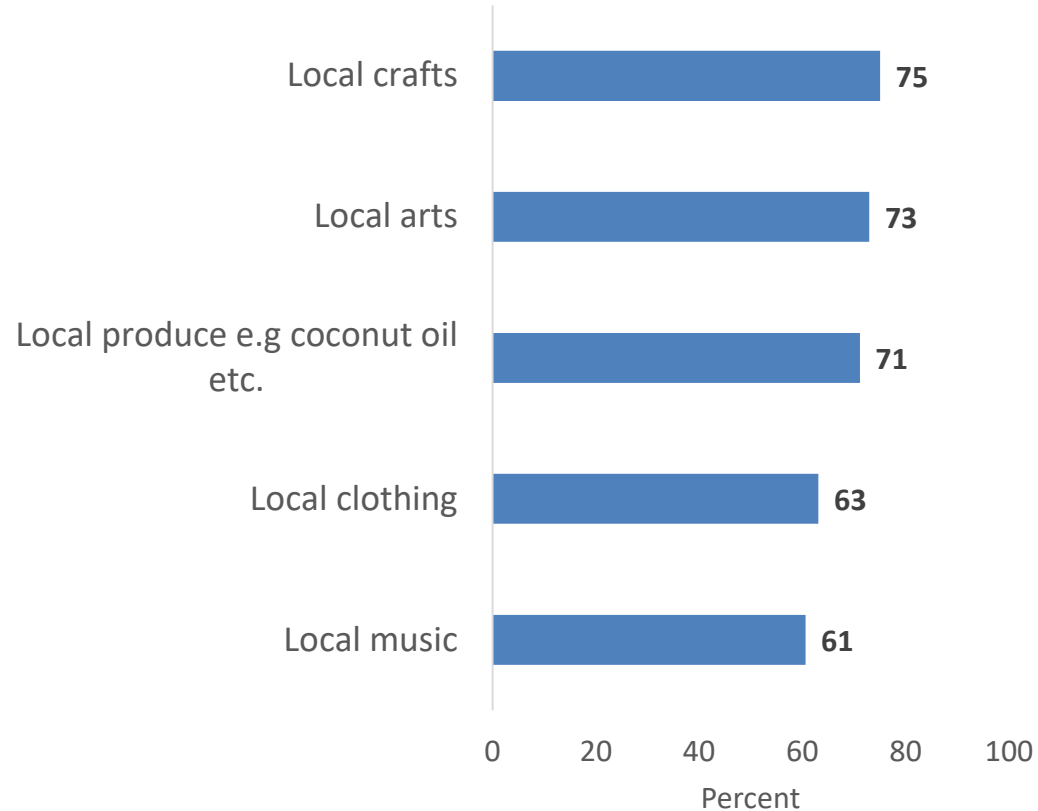


*Note: Multiple responses, therefore total does not add up to 100%*

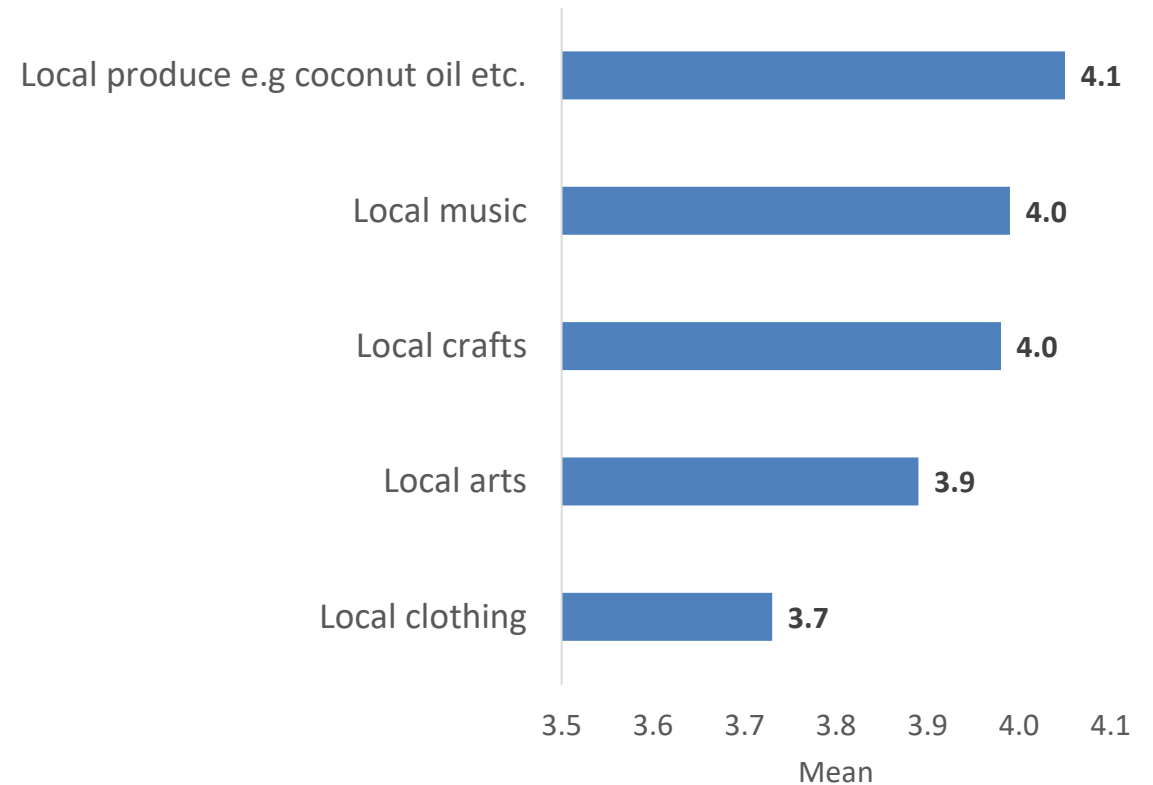
*Note: The analysis is based on data from Jan – Jun 2018*

# Aged 70+ Shopping – all visitors

**Degree of Participation**



**Satisfaction**



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

*Note: The analysis is based on data from Jan – Jun 2018*

# 70+ Holiday - most appealing ...the people...

“Friendliness, easy access ability of most things on Efate”

“The courtesy the Ni-Vanuatu people show to us, as elderly people. The quiet unassuming manner of everyone and, of course, the beautiful smiles.”

“the friendliness of the local people and able to communicate in English”

# 70+ Holiday - Least Appealing ...transport

“Airport was very crowded, long delays to get to customs, when we were leaving.”

“I felt that as a older single female I was being picked on by the airline agent. Because of the way I was treated at the airport I won't stay again.”

“Virgin and Air Vanuatu planes leaving 15 mins apart and long queues in stifling heat to board the plane. I felt I was going to faint”

“As I was incapacitated with a hip problem, I found it difficult to climb into the minibuses and other things that I was involved with. Nothing much for the handicapped.”

“Being over 70 we found it difficult to get into the buses”

# 70+ Holiday - Least appealing...infrastructure

“Our only disappointment was that we were not informed about the difficulty of the terrain, including broken hand railing on the walk to the waterfall. This is not a suitable walk for the elderly.”

“More accessible public toilets for the elderly”

“I was saddened by the lack of facilities of the main hospital”



# 70+ Holiday - Least appealing ....

## Accommodation and Access

“Needed to be on the lower level of accommodation - not having the 45 steps to our unit”

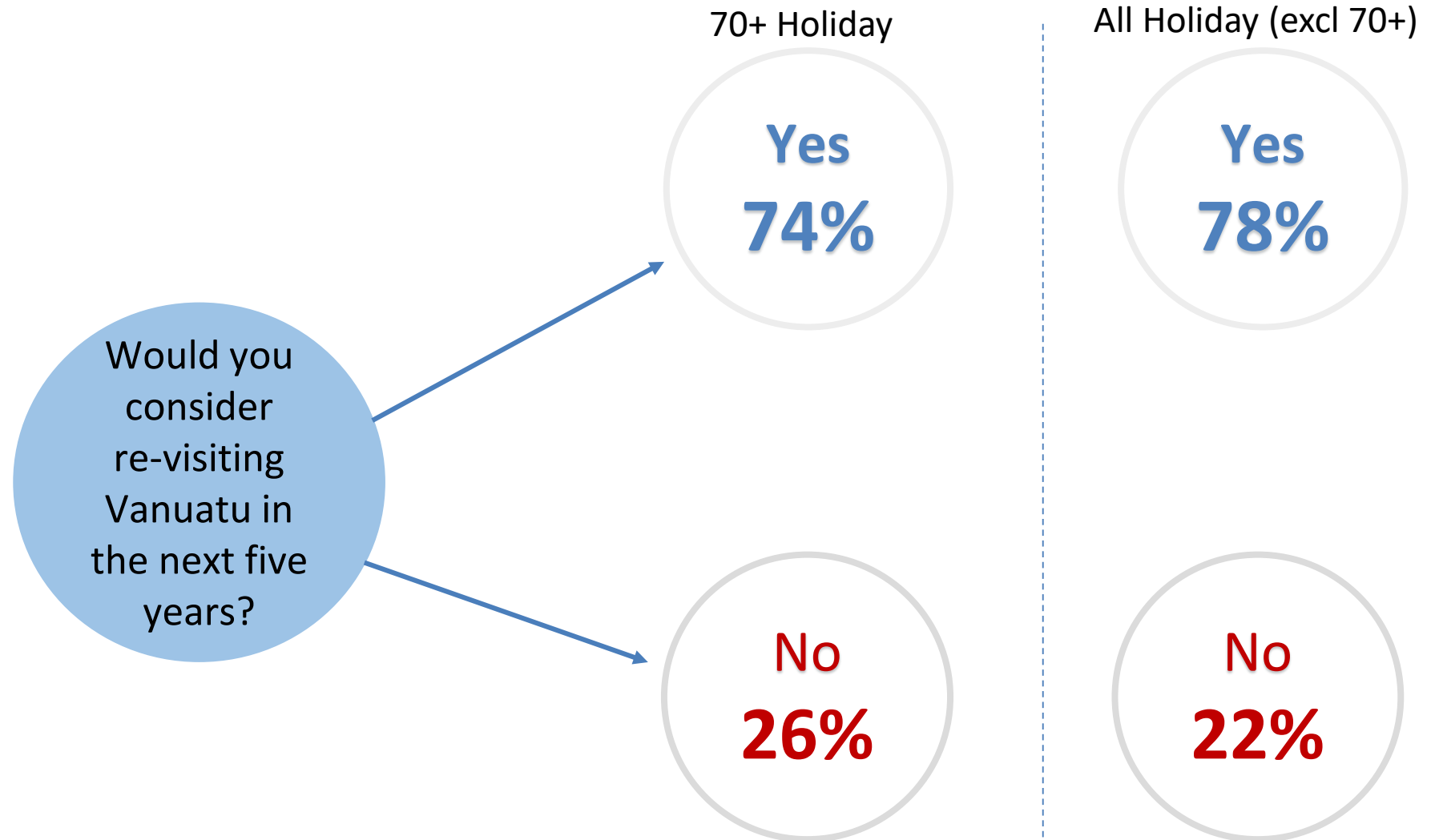
“Nothing in particular, except that the resort seemed unprepared for a fairly simple medical need. This was somewhat rectified by the personal intervention of the manager.”

“We really needed a bit more information on what was available for those with limited mobility\*”

# Recommendations.....

- Add a wider range of specific information online and for agents
- Think about improvements for elderly access at the airport
- Emphasize access issues in new property and infrastructure design e.g. toilets, enhanced signage
- Find ways to develop access to areas where elderly visitors can spend money, try to improve transport availability and attraction access
- Continue to grow and develop the VTO access tourism pages and links, prepare ambassadors for the special needs of this market.

# A little less willing to return....



# Supporting decision making in:

## 70+ age group

- Is this market worth pursuing?
- What challenges/opportunities in attracting this market?
- What challenges/opportunities in developing product?
- What are the key messages to investors?
- Where does this market sit in broader strategy?
- Is there a missed opportunity for the Outer Islands?
- What additional insights would be valuable?

# DATA MINING:MOVING FORWARD

- Visitor characteristics by accommodation choices
- Carrier
- Sustainable tourism indicators
- Disseminating the findings



Rarotonga, Cook Islands · Homes

12 Apr – 20 Apr

1 guest

Home type

Price

Instant Book

More filters

★★★★★ 3



ENTIRE VILLA · 1 BED

**Deluxe One Bedroom Apartment**

\$245 NZD per night · Free cancellation

Highly rated host



ENTIRE HOUSE · 2 BEDS

**'Live Like a Local' at TuiTui House**

\$150 NZD per night

★★★★★ 3



ENTIRE HOUSE · 2 BEDS

**Tanias Island Getaway 2**

\$130 NZD per night

★★★★★ 10 · Superhost

# Sharing Economy – Impacts?







# COOK ISLANDS VISITORS SURVEY DATA INSIGHTS

## COOK ISLANDS VISITOR SURVEY

### CHARACTERISTICS BY ACCOMMODATION TYPE

Figure 2: Profile of visitors staying at hotels/resorts

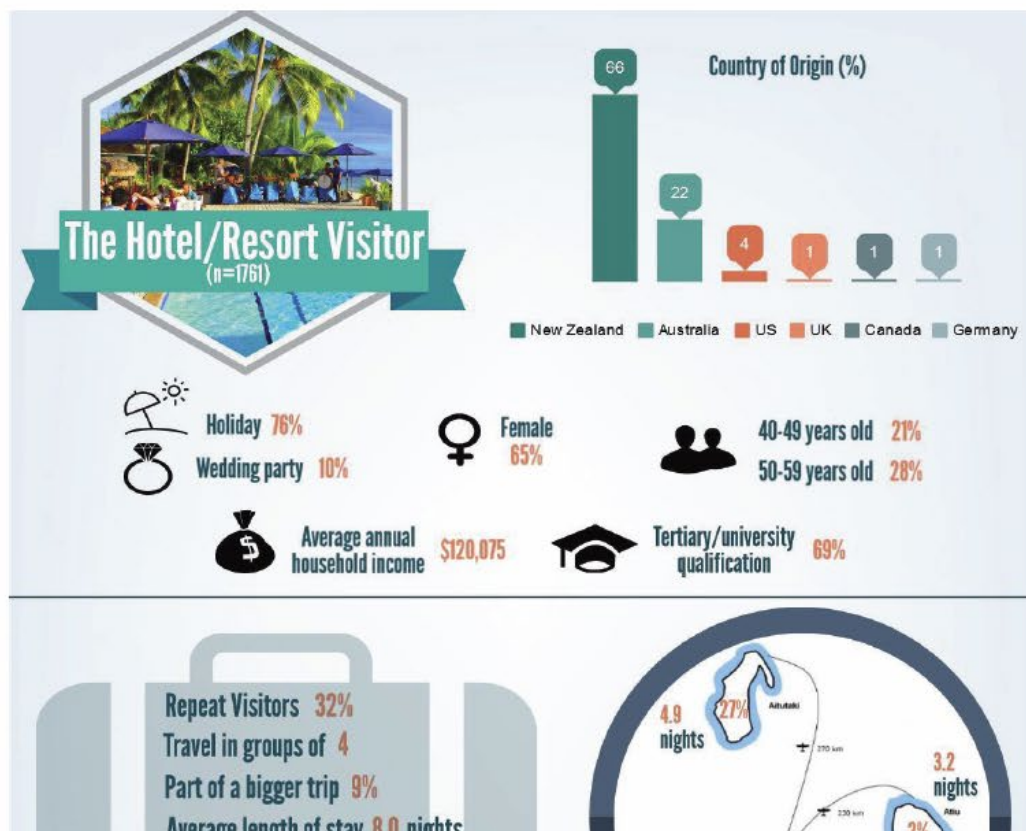


Figure 3: Profile of visitors staying at self-catering accommodation

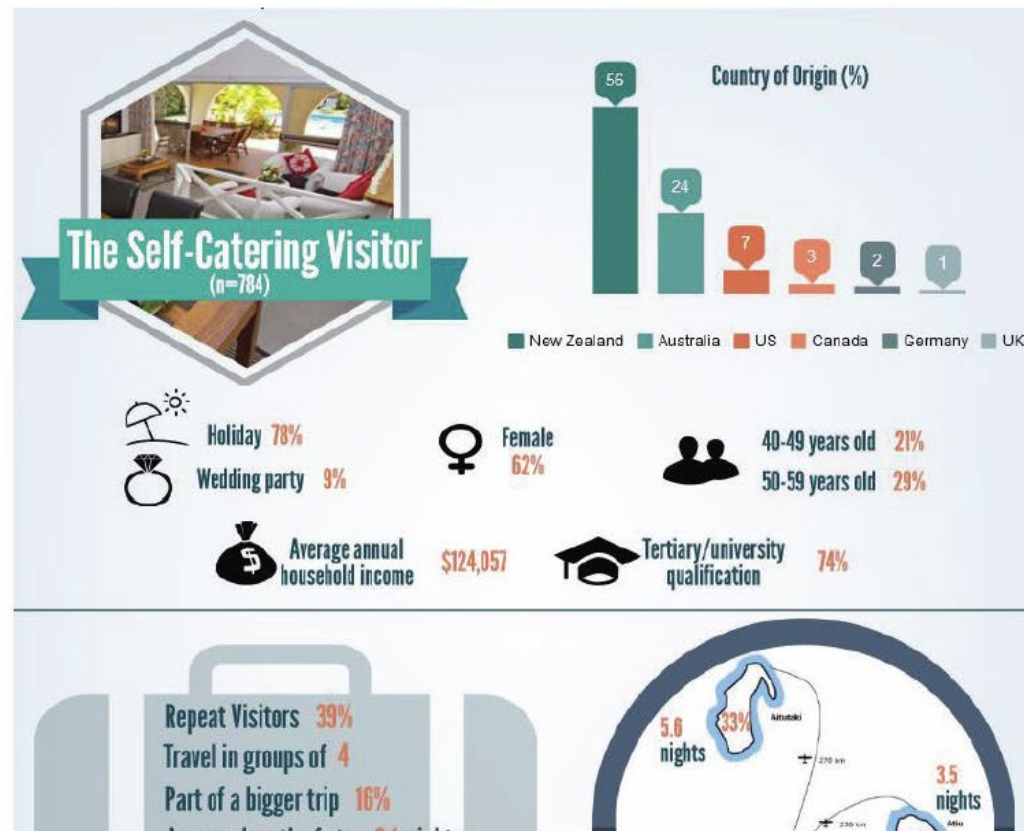


Figure 4: Profile of visitors staying at backpackers

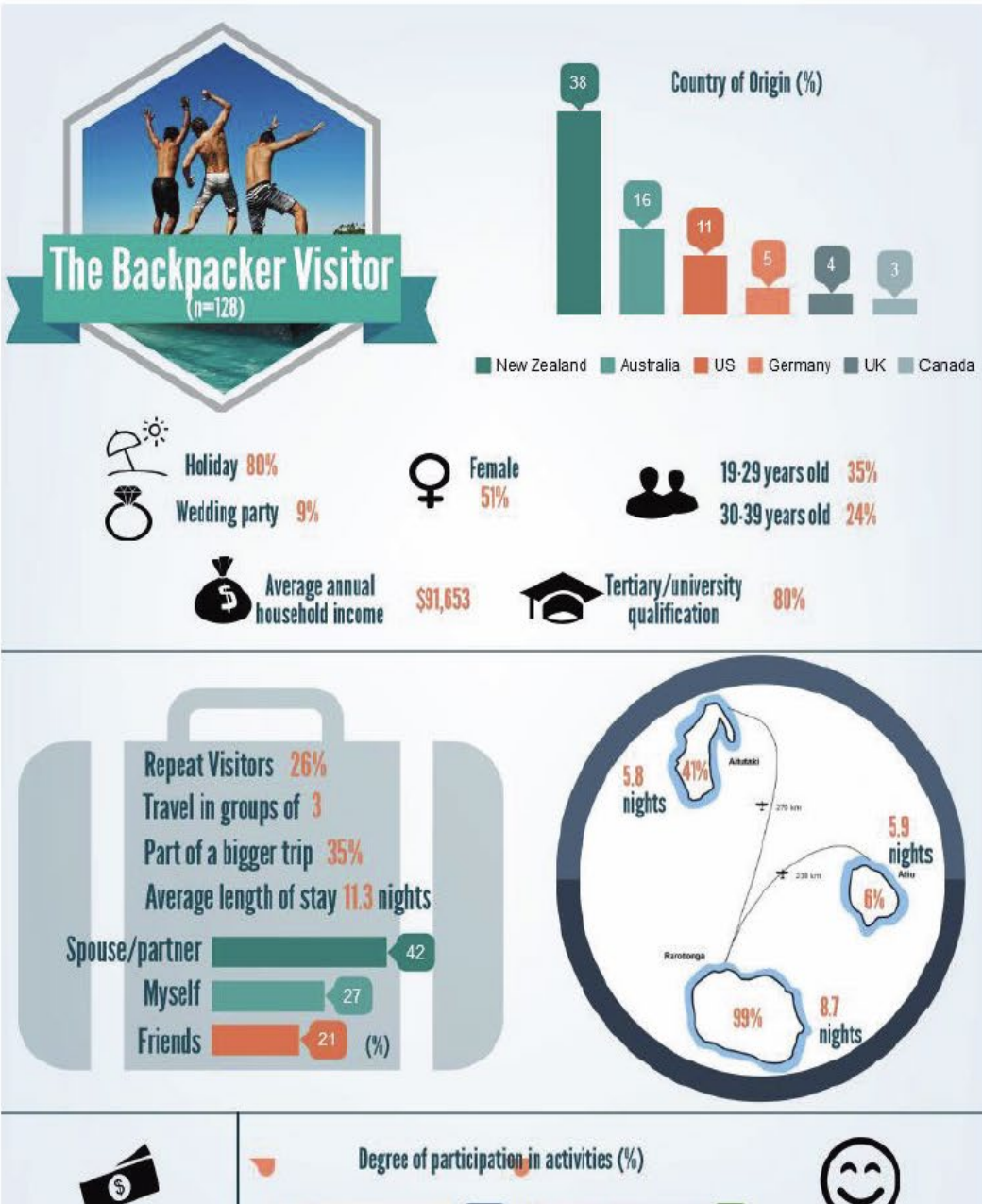
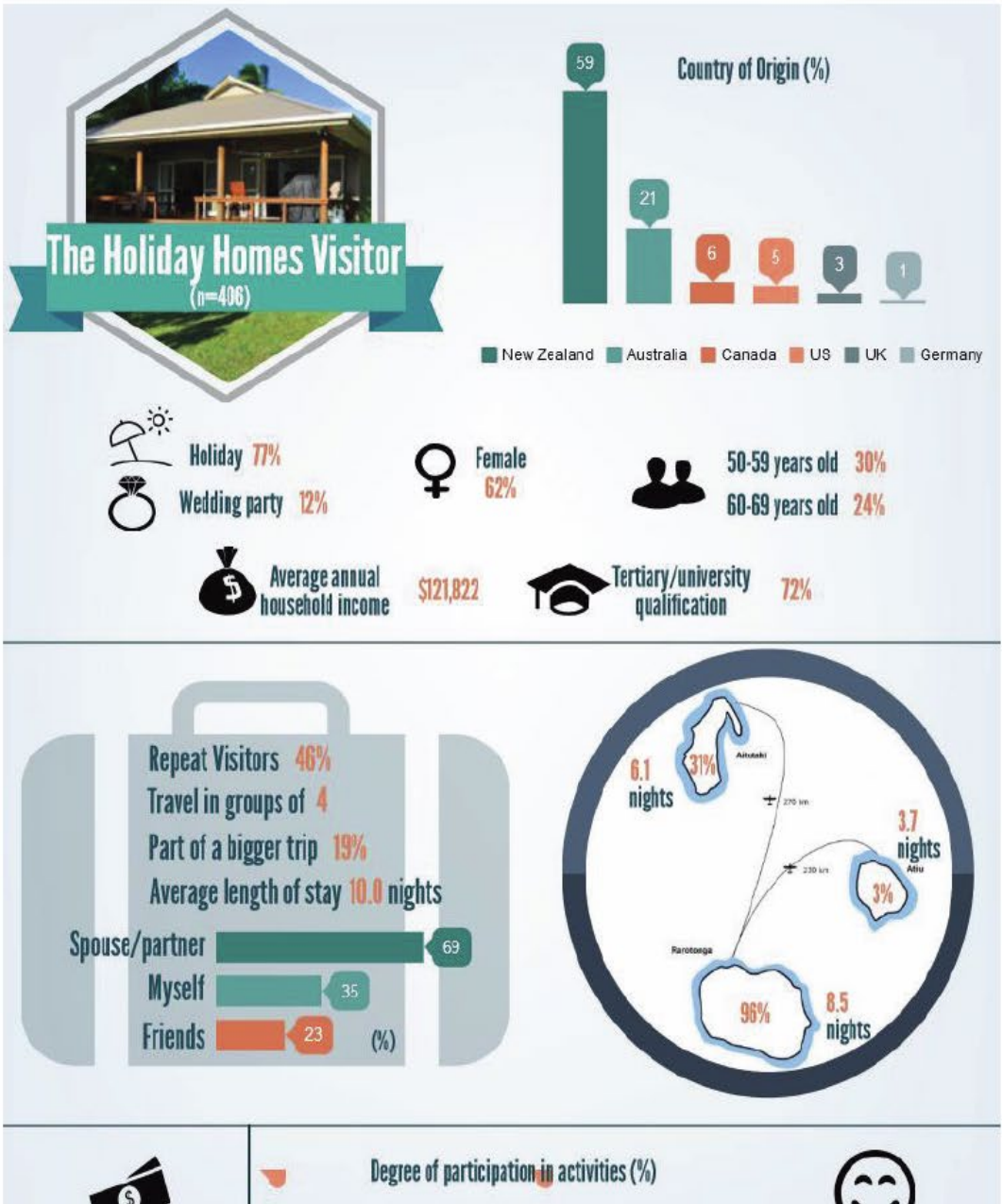


Figure 5: Profile of visitors staying at holiday homes

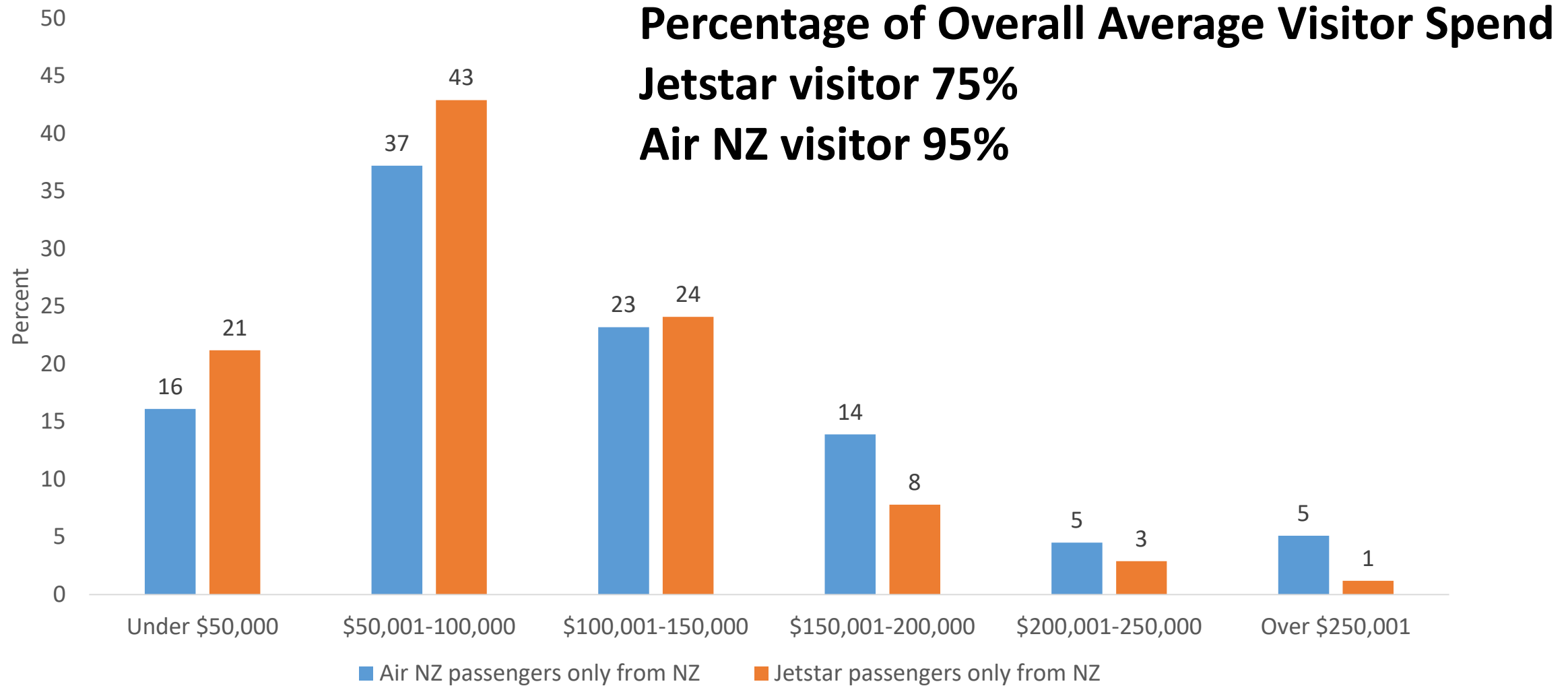




# IMPACT OF LOW COST CARRIERS



# Cook Islands LCC Household Income



# PROTECTING OUR FUTURE

Cook Islands Sustainable Tourism  
Development Policy Framework & Goals



# Te Kaveinga Nui

National Sustainable  
Development Plan  
2016 - 2020



GOVERNMENT OF THE COOK ISLANDS  
THE OFFICE OF THE PRIME MINISTER



## The National Development Goals

A scorecard for national development

	1	Improve welfare, reduce inequity and economic hardship
	2	Expand economic opportunities, improve economic resilience and productive employment to ensure decent work for all
	3	Promote sustainable practices and effectively manage solid and hazardous waste
	4	Sustainable management of water and sanitation
	5	Build resilient infrastructure and Information Communication Technologies to improve our standard of living
	6	Improve access to affordable, reliable, sustainable, modern energy and transport
	7	Improve health and promote healthy lifestyles
	8	Ensure inclusive and equitable quality education and promote life-long learning opportunities
	9	Accelerate gender equality, empower all women and girls, and advance the rights of youth, the elderly and disabled
	10	Achieve food security and improved nutrition, and increase sustainable agriculture
	11	Promote sustainable land use, management of terrestrial ecosystems, and protect biodiversity
	12	Sustainable management of oceans, lagoons and marine resources
	13	Strengthen resilience to combat the impacts of climate change and natural disasters
	14	Preserve our heritage and history, protect our traditional knowledge, and develop our language, creative and cultural endeavours
	15	Ensure a sustainable population engaged in development by Cook Islanders for Cook Islanders
	16	Promote a peaceful and just society and practice good governance with transparency and accountability



Each diagram has nine possible scenarios, represented as numbers, that are used to assess each indicator. There are:

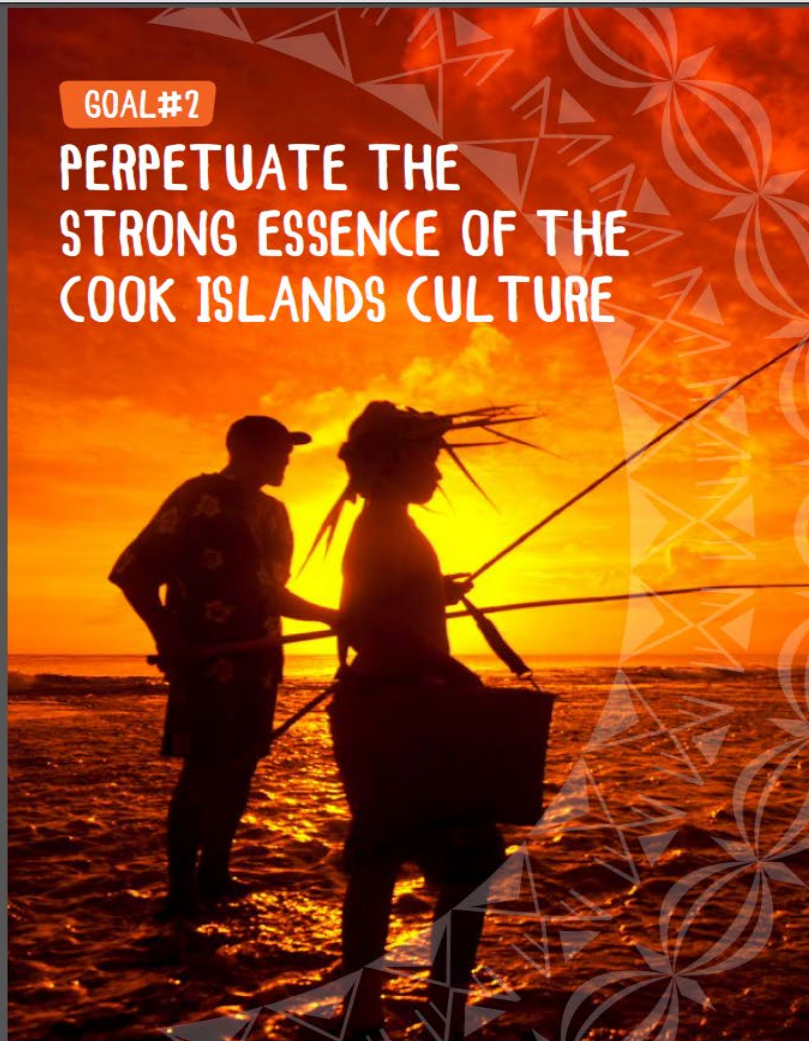
1. On track and continues to improve.
2. On track, however there are signs of regression.
3. On track, and no changes since the previous year.
4. Of concern, however there are signs of improvement.
5. Of concern, and regressing. Requires attention.
6. Of concern, and no change since the previous year.
7. Off track, data suggests an improvement.
8. Off track and continues to regress.
9. Off track and there has been no change since the previous year.

**Note: Based on National Sustainable Development Plan 2016 - 2020**



## GOAL#2

# PERPETUATE THE STRONG ESSENCE OF THE COOK ISLANDS CULTURE



## TOURISM POLICY GUIDELINES AND INDICATORS

### B. CULTURE AND HERITAGE

Cultural heritage and intangible heritage are key elements of the tourism industry in the Cook Islands, underpinning the unique sense of place that the country, and each of its islands, offers visitors. Land lies at the heart of culture and visitors not only experience the terrestrial resources on offer but also the cultural dimensions, museums, creative arts and intellectual property that are important elements of the Cook Islands experience. While it is vital to ensure that the everyday life and culture of local people is shared with visitors this must be done in an appropriate fashion that is informed by the community itself.

#### » The community experience of tourism must be better understood and valued alongside the visitor experience

Hosts are not just the property owners and restaurant staff who visitors interact with – they are the broader host community in all its forms. It is vital that communities throughout the Cook Islands benefit directly from tourism and that they are aware of the benefits (and potential costs) the industry brings. To understand community awareness of and links to tourism it is vital to put in place ongoing community focused research on any islands exposed to tourism development.

- Community support for tourism. The percentage identifying as strongly supportive or showing limited support.
- Community impacts of tourism – local identification of benefits and costs (%)

#### » Maximise opportunities for visitors to understand and learn about heritage in all its forms.

If community are to benefit from tourism it is vital that they have opportunities to link to the industry directly through appropriately developed and managed products and experiences. An increase in visitors engaging in appropriate forms of community focused tourism will support the growth of local jobs and income and also enrich the visitor experience. This is particularly vital in the Outer Islands where the opportunity exists to build on dimensions of everyday life and culture that offer a point of difference to

#### Rarotonga.

If cultural heritage sites are to be linked more effectively into the tourism experience they require protection, maintenance and interpretation – tourism can play an important role in assisting to fund such sites.

- percentage of visitors engaging in culturally immersive activities
- visitor satisfaction with culturally immersive activities
- number/percentage/range of tourism products and/or experiences featuring community/cultural elements
- amount of user pay funding going to protect heritage sites

#### » The Kia Orana Values program is sustained and developed

The Kia Orana Values program is a vital tool to reinforce the important links between community, culture and sustainable tourism development. It is important that the early gains achieved by this program are sustained through ongoing investment. The success of the approach can be monitored through the community research discussed earlier in this section.

- Funding continues for the Kia Orana program and grows with visitor numbers or as issues require intervention.



On Track

1 Visitor comments on availability of local food

Positive Trend



Percentage





## GOAL#4

# ENSURE THE PROTECTION OF THE PRISTINE ENVIRONMENT THROUGH SUSTAINABLE PRACTICES

## D. ENVIRONMENTAL MANAGEMENT

The Kia Oranavalue Akono I Te Ao Rangī – Preserve our natural environment – is central to the sustainable development of tourism in the Cook Islands. The potentially fragile nature of the resource base upon which tourism depends and the need for coordinated efforts across all agencies to manage environmental challenges must be addressed.

- » **General environmental quality in Rarotonga and Aitutaki is vital to tourism and the industry must play a role in protecting this resource.**

Muri and Aitutaki Lagoons are a vital component of the Cook Island's tourism industry with their images integral to marketing efforts and their waters hosting an array of visitor experiences and products. Recent algal blooms have highlighted the importance of collective evidence based approaches to solving environmental degradation and similar approaches need to be adopted for all challenges to environmental quality.

- Visitor comments on general environmental quality
- Percentage of businesses complying with Environmental Warrant of Fitness.

- » **The Environmental Impact Assessment process is applied to all new tourism products that have the potential to disrupt or damage the environment**

As the range of tourism products develops it will be important to ensure that new products have an effective EIA conducted – this is especially the case for water or land based products that do not feature permanent structures (e.g. lagoon based activities and terrestrial trail development).

- The percentage of new tourism developments that complete an EIA.

- » **Increased use of bicycles, hybrid/electric rental vehicles and public transportation by visitors and the tourism industry**

Growing congestion on the roads of Rarotonga threatens the health and well-being of both visitor and resident alike. There is no question that traffic congestion significantly reduces the pristine Pacific allure of Rarotonga. Cycling in particular also enables a slower more interactive form of tourism. These are just some of the reasons to focus on shifting visitors towards bicycles, electric vehicles or public forms of transport. Over time this may become a marketable point of difference for the Cook Islands.

- percentage of visitors using car, cycle or public transport
- percentage of rental transport hybrid or electric

- » **Reduce waste generated by tourism related activities and raise awareness**

There are numerous initiatives being put in place to reduce

waste and improve its management. The accreditation system represents an important tool to ensure that tourism operators minimize waste production while also educating visitors.

- percentage of businesses undertaking waste reduction approaches
- percentage of visitor comments on waste/rubbish

- » **Enhance water conservation through improved measures and education**

There are concerns around current and future water availability on Rarotonga, Aitutaki and Atiu. It is vital that the industry contribute to efforts to reduce water use and the accreditation system represents a model to achieve these goals.

- percentage of businesses undertaking water conservation approaches, including visitor information/education

- » **Tourism development should occur in a fashion and at sites that minimises exposure to the risks of climate change.**

The area of climate change and community resilience is dealt with in some detail by the NSDP. The critical issue for tourism is not just how buildings are constructed but where and certainly it is important to encourage investment away from areas that appear to be most vulnerable to sea level rise and cyclone damage.

- percentage of tourism plant and product located in highly vulnerable settings is reduced

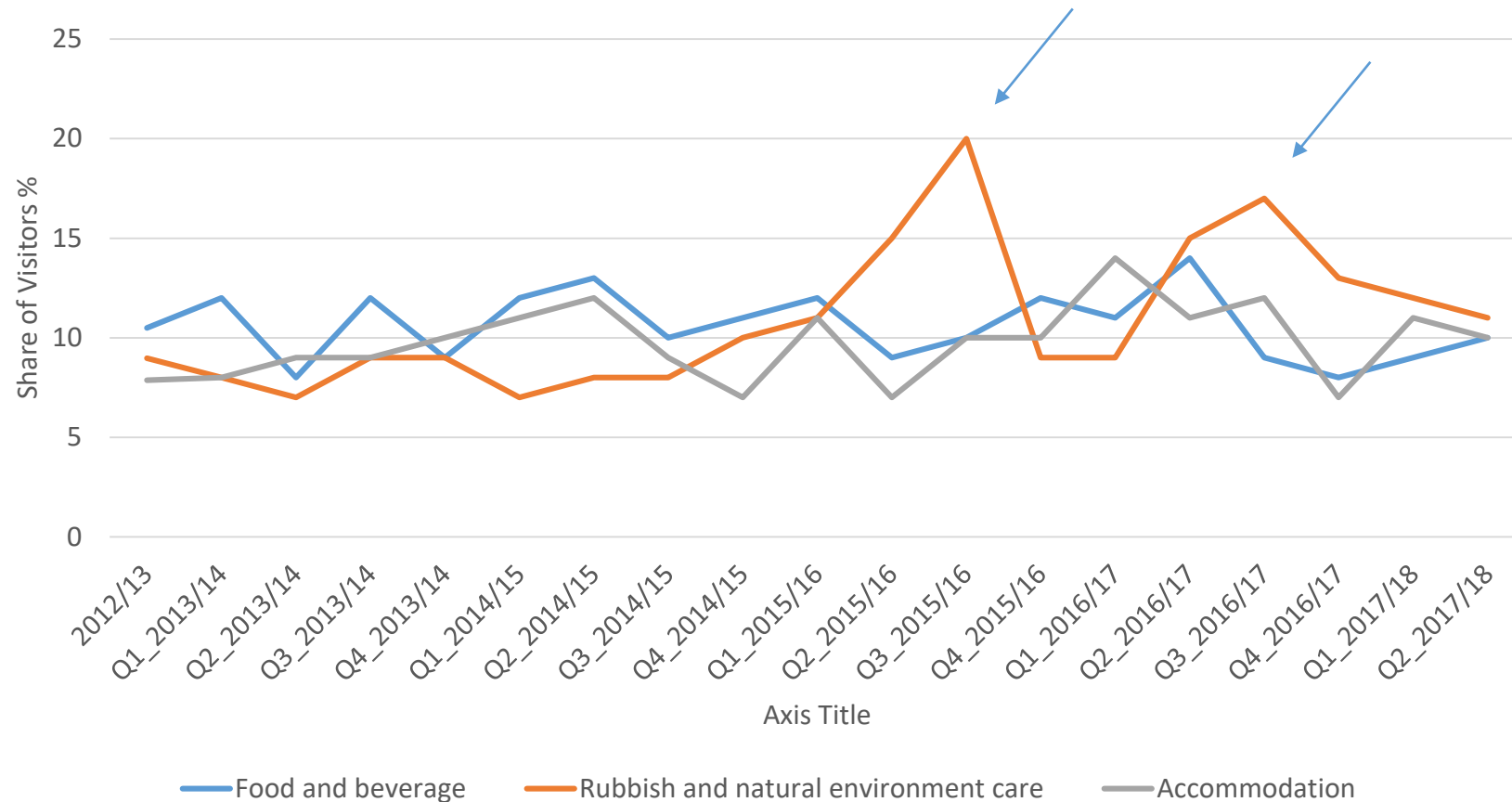
- » **Continue to grow and enhance the Vaka Pride and other community focused environmental improvement programs**

The Vaka pride program is an important initiative recently designed to enhance the engagement between communities and the environment they share with visitors. It has recently been expanded to Aitutaki and represents an important tool to support Tourism's contribution to the environment.

- Funding and expansion of Vaka Pride continues to grow.
- Scorecard of every Vaka Pride and Te Vaka O Ru competition.



# Cook Islands Visitors - Least Appealing Aspects





# OVERALL

## Environmental Management

**Visitor's comments (both negative and positive) on environment increased. Fewer car rentals and more cyclists but visitors are less likely to be using public transport. Reduced negative comments on waste.**





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## Pacific Tourism Data Initiative

The overall goal of the Pacific Tourism Data Initiative is to increase evidence based tourism decision making in the Pacific with a view to strengthening sustainable economic development.



Niue



Samoa



Solomon Islands



Vanuatu



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## Pacific Tourism Data Initiative - Vanuatu

Pacific Tourism Data Initiative :: Vanuatu



### Available Resources

 [International Visitor Report – Annual Report \(Jan 2017 to Dec 2017\)](#)

 [International Visitor Report – Quarterly Report \(Jan 2018 to March 2018\)](#)

 [International Visitor Report \(Jan 2018 to June 2018\)](#)

 [Data mining outer islands – Tanna and Santo \(Jan 2017 to December 2017\)](#)

 [Data mining - 70+ visitor market \(November 2018\)](#)

 [Vanuatu International Visitor Survey Instrument](#)

 [Vanuatu Business Confidence Index - Survey Instrument \[DRAFT - IN DEVELOPMENT\]](#)

### Regional presentations

[Pacific Tourism Data Initiative: Supporting Evidence Based Planning and Development. Presentation to MFAT 12.06.18](#)

## About

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# Cook Islands Resources and Outputs

## Cook Islands International Visitor Survey

NZTRI facilitates an online Visitor Survey for the Cook Islands Tourism Corporation (CITC), (2012 - present). A summary of the results from each year is available below. This research was designed to provide a deeper understanding of the characteristics of visitors to the Cook Islands including their expectations and expenditure. Feedback from visitors to the Cook Islands enables CITC to improve the visitor experience as well as support it to make good decisions about tourism.

This research evolved from previous work undertaken by NZTRI in the Cook Islands from 2005 to 2007.

International Visitor Survey	Size
 Cook Islands Visitor Survey - Annual Summary Report - April 2012 to March 2013	1.75 MB
 Cook Islands Visitor Survey - Quarterly - April 2012 to June 2012	1.65 MB
 Cook Islands Visitor Survey - Quarterly - July 2012 to September 2012	1.67 MB
 Cook Islands Visitor Survey - Quarterly - October 2012 to December 2012	1.78 MB
 Cook Islands Visitor Survey - Quarterly - January 2013 to March 2013	1.65 MB
 Cook Islands Visitor Survey - Annual Summary Report - July 2013 to June 2014	1.29 MB
 Cook Islands Visitor Survey - Quarterly - July 2013 to September 2013	1.29 MB
 Cook Islands Visitor Survey - Quarterly - October 2013 to December 2013	1.4 MB
 Cook Islands Visitor Survey - Quarterly - January 2014 to March 2014	1.2 MB
 Cook Islands Visitor Survey - Quarterly - April 2014 to June 2014	1.33 MB
 Cook Islands Visitor Survey - Annual Summary Report - July 2014 to June 2015	1.59 MB
 Cook Islands Visitor Survey - Quarterly - July 2014 to September 2014	857.27 KB
 Cook Islands Visitor Survey - Quarterly - October 2014 to December 2014	1.3 MB
 Cook Islands Visitor Survey - Quarterly - January 2015 to March 2015	1.26 MB
 Cook Islands Visitor Survey - Quarterly - April 2015 to June 2015	1.26 MB
 Cook Islands Visitor Survey - Annual Summary Report - July 2015 to June 2016	2.04 MB
 Cook Islands Visitor Survey - Quarterly - July 2015 to September 2015	1.44 MB
 Cook Islands Visitor Survey - Quarterly - October 2015 to December 2015	1.47 MB
 Cook Islands Visitor Survey - Quarterly - January 2016 to March 2016	1.44 MB
 Cook Islands Visitor Survey - Quarterly - April 2016 to June 2016	1.5 MB
 Cook Islands Visitor Survey - Annual Summary Report - July 2016 to June 2017	2.75 MB
 Cook Islands Visitor Survey - Quarterly - July 2016 to September 2016	1.28 MB
 Cook Islands Visitor Survey - Quarterly - October 2016 to December 2016	1.35 MB
 Cook Islands Visitor Survey - Quarterly - January 2017 to March 2017	1.52 MB
 Cook Islands Visitor Survey - Quarterly - April 2017 to June 2017	1.05 MB
 Cook Islands Visitor Survey - Quarterly - July 2017 to September 2017	730.71 KB
 Cook Islands Visitor Survey - Quarterly - October 2017 to December 2017	737.7 KB
 Cook Islands Visitor Survey - Quarterly - January 2018 to March 2018	1.63 MB
Cook Islands Visitor Survey - Quarterly - April 2018 to June 2018	1.63 MB

## Business: Survey and Confidence Index

Size

 Cook Islands Business Survey and Confidence Index - 2016 - Report 1

1.06 MB

 Cook Islands Business Survey and Confidence Index - 2016 - Report 2

1.1 MB

 Cook Islands Business Survey and Confidence Index - 2017 - Report 1

1.34 MB

 Cook Islands Business Survey and Confidence Index - 2017 - Report 2

1.42 MB

## Data Mining

 Cook Islands - Market Segment Analysis - October 2014


 Cook Islands - Visitor Characteristics by Accommodation Type - August 2015

 Cook Islands - Outer Island Visitor Characteristics and Impacts - August 2015

 Cook Islands - Te Maeva Nui Event Analysis - April 2016

 Cook Islands - Soft Adventure Visitor Characteristics - January 2017

 Cook Islands - Wedding Party Visitor Characteristics - January 2017

 Cook Islands - Pearl Shopper Characteristics - July 2018

 Cook Islands - Wedding Party and Honeymoon Segments 2012-2017 - August 2018





**THANK YOU**

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**[www.nztri.org.nz](http://www.nztri.org.nz)**