

# SOLOMON ISLANDS

## INTERNATIONAL VISITOR SURVEY INSIGHTS

### Repeat Visitor Characteristics and Segmentation

2018 – 2020



SOLOMON ISLAND GOVERNMENT



#### Acknowledgement:

Thank you to Tourism Solomons for their support towards this project.

Your assistance is greatly appreciated.

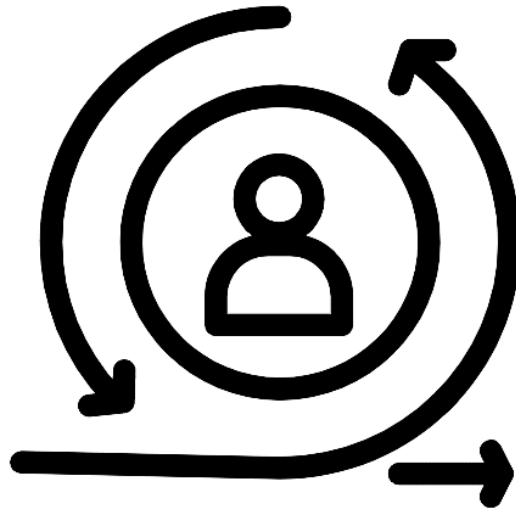
# Background

- The 2018 - 2020 IVS data set (n=2,540) is analysed to help us understand characteristics of the repeat international visitor to Solomon Islands.
- Visitors are segmented into 4 categories:
  - New Visitors (First time)
  - Acquainted Visitors (2 or 3 times)
  - Attached Visitors (4 or 5 times)
  - Devoted Visitors (6+)
- The following reporting covers the following key visitor characteristics: average household income, length of stay, places visited, accommodation selected, information & decision making, visitor spending, visitor satisfaction etc.
- NB Due to COVID-19, any 2020 data mentioned in the report only covers January to mid-March.
- All reports completed from the IVS are available at:

[www.nztri.org.nz/visitor-research/pacific](http://www.nztri.org.nz/visitor-research/pacific)

# Why return visitors?

- Return visitors are highly likely to be featuring strongly in early visitation following the opening of borders....



# Report Structure



Visitor  
Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



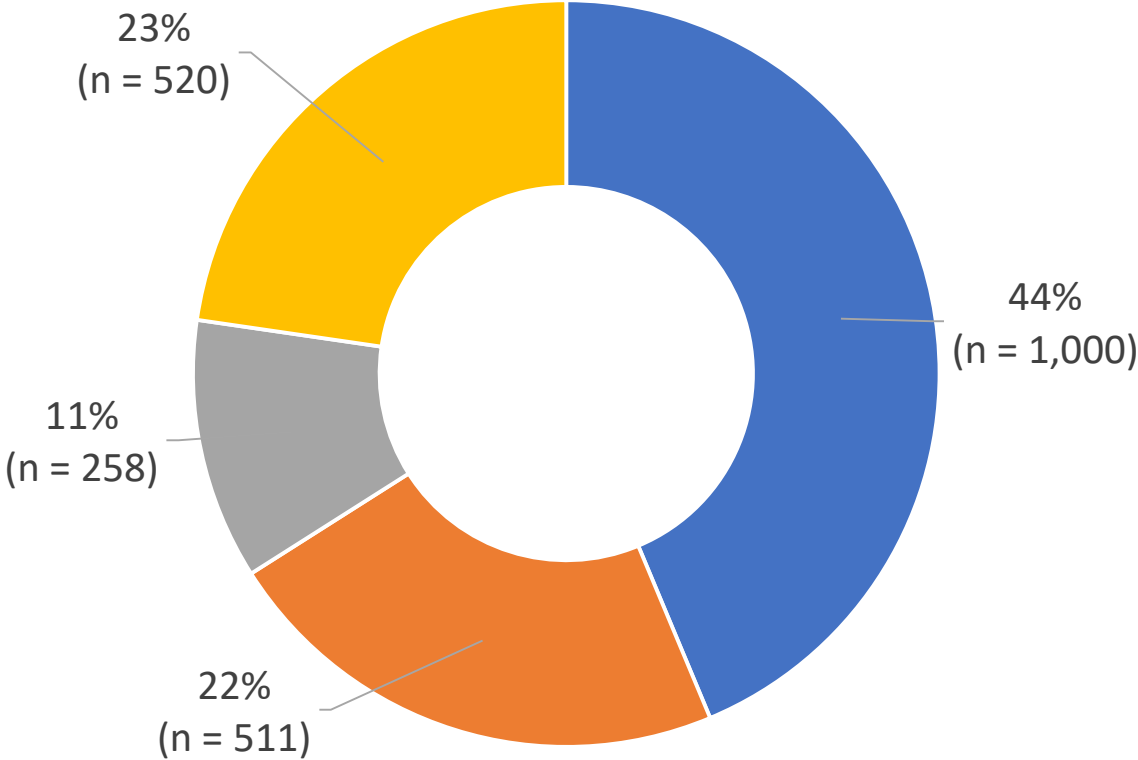
Visitor Spending  
and Impact



Visitor  
Satisfaction

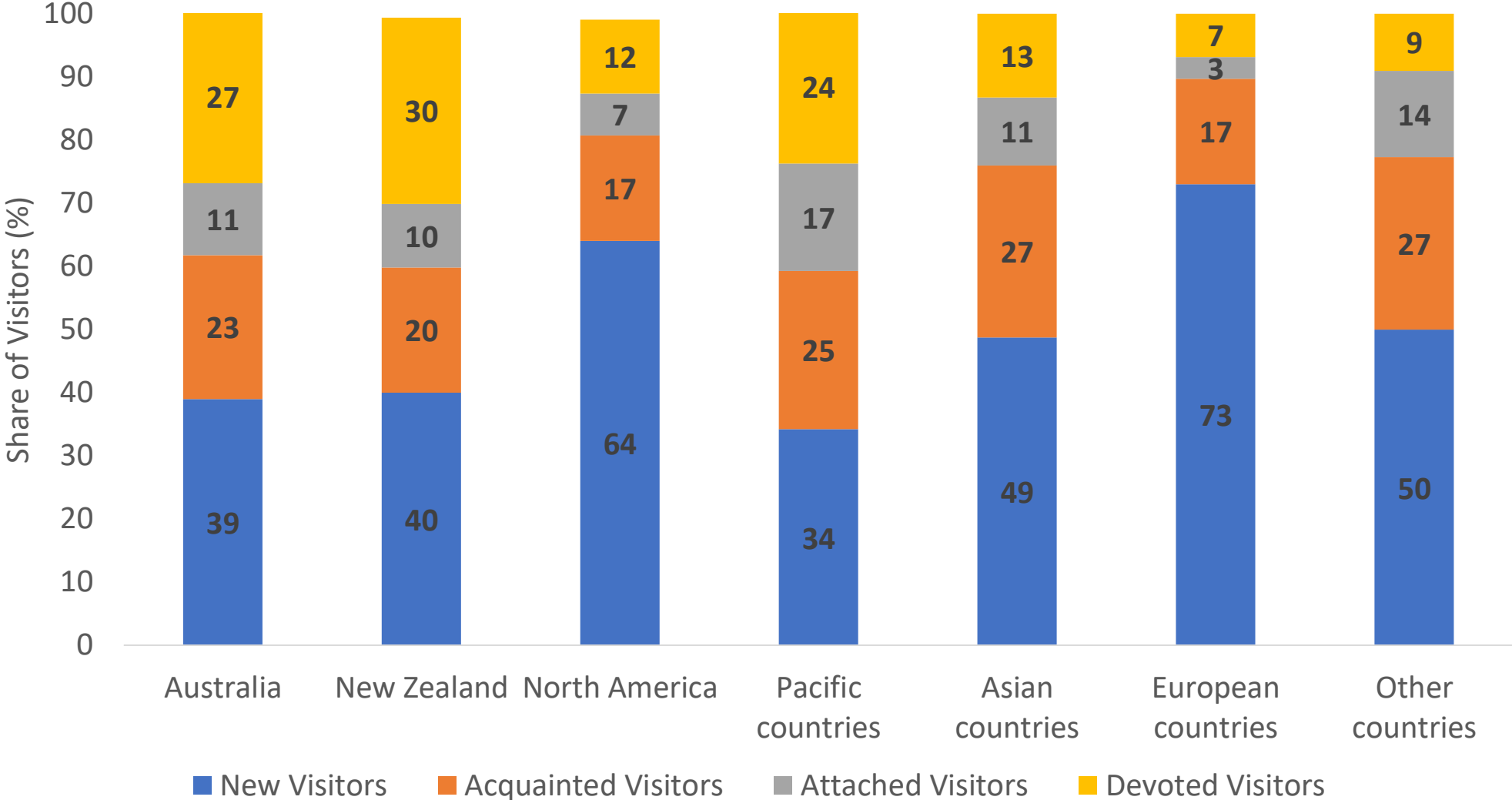
# First-time and repeat visitors (Jan 2018 - Mar 2020 IVS Data)

## Four segments: New, Acquainted, Attached and Devoted

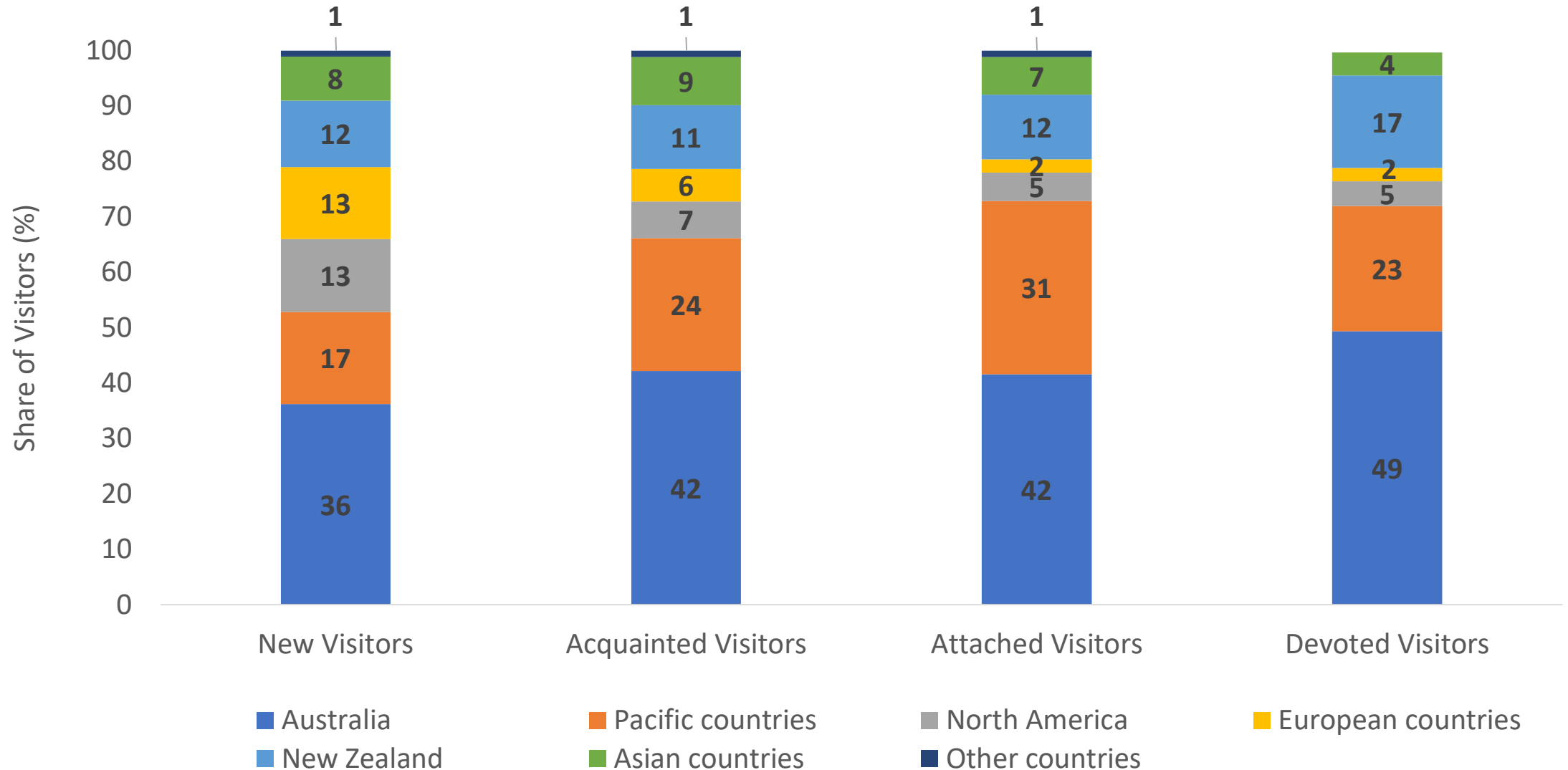


■ New Visitors   ■ Acquainted Visitors   ■ Attached Visitors   ■ Devoted Visitors

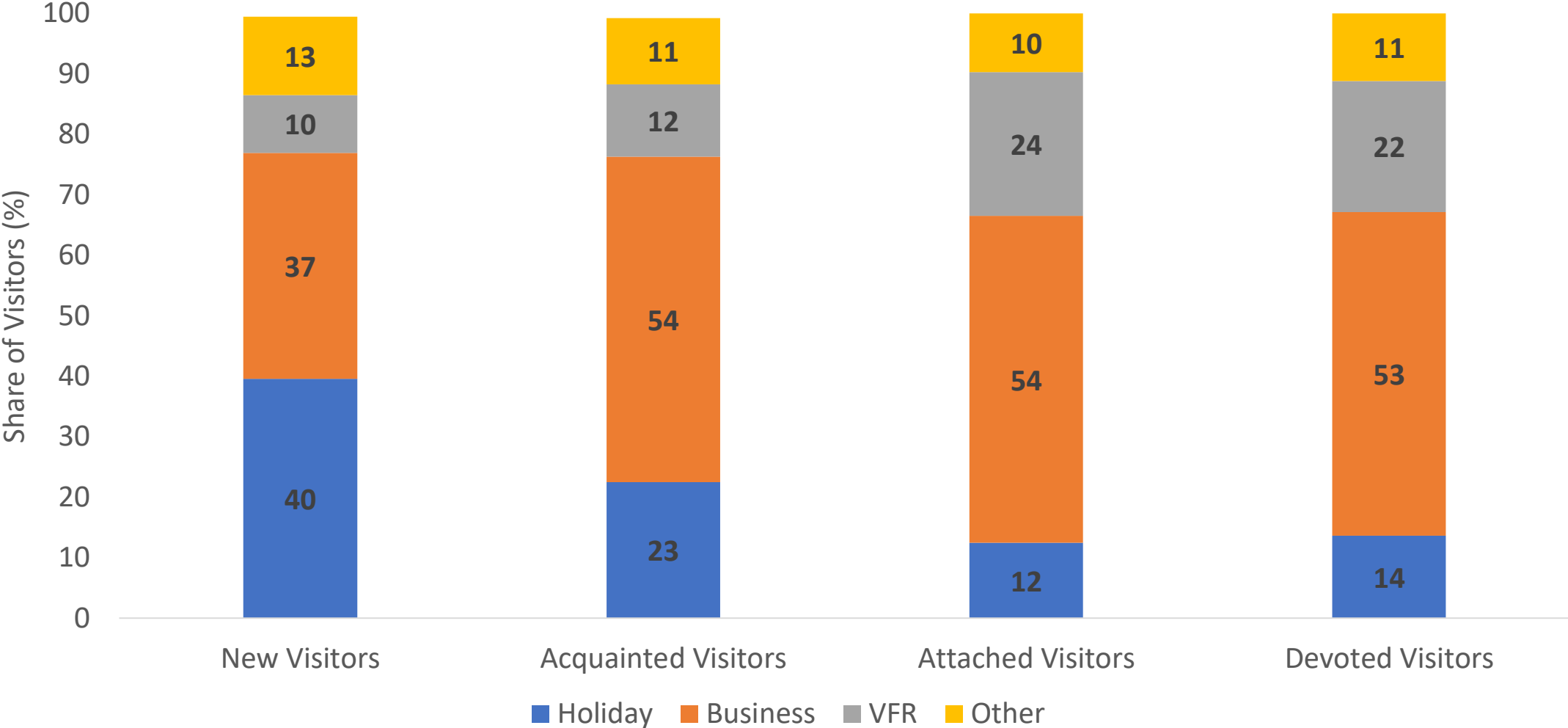
# Pacific countries and Australia have the highest ratio of repeat visitors



# Australia dominates the repeat visitor segment followed by Pacific countries

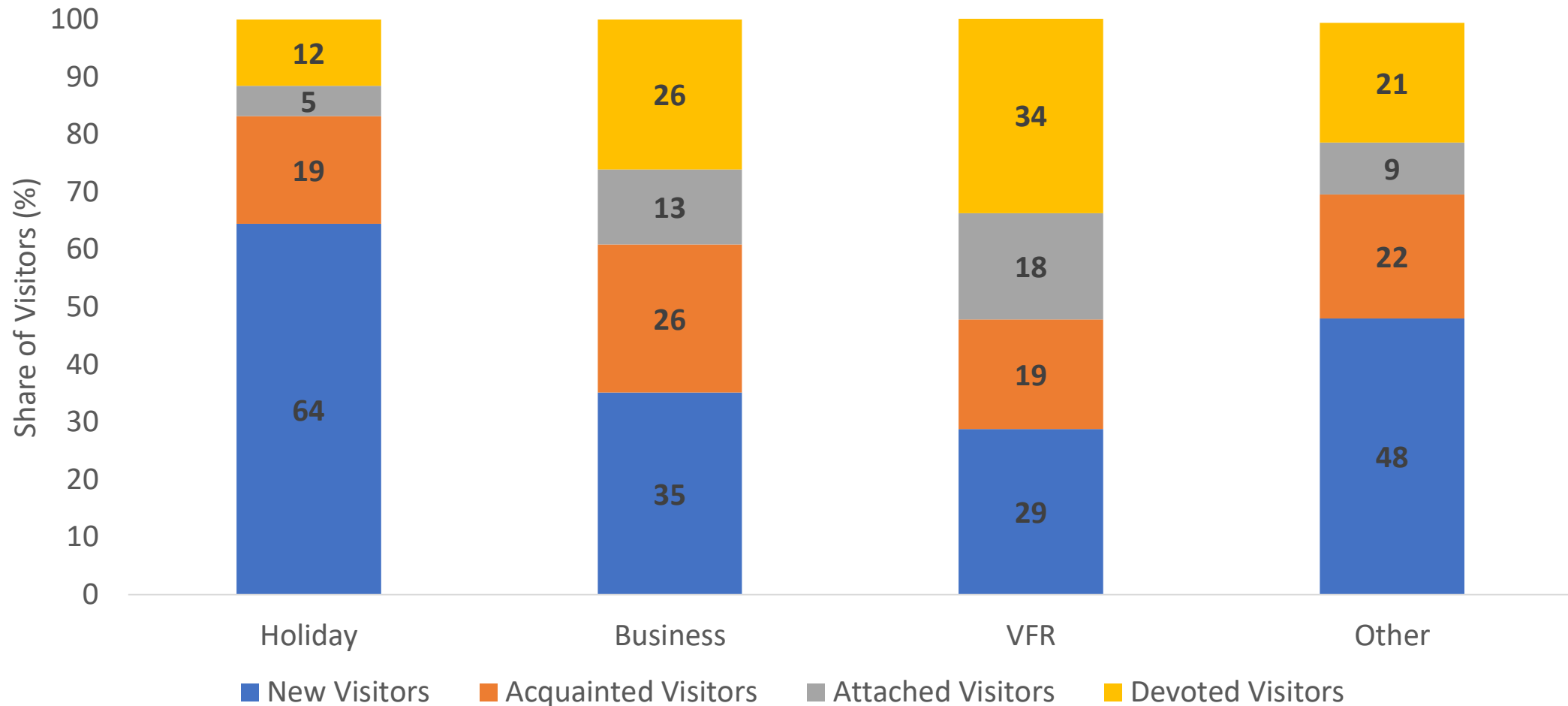


# The role of holiday travel diminishes in the repeat visit segments

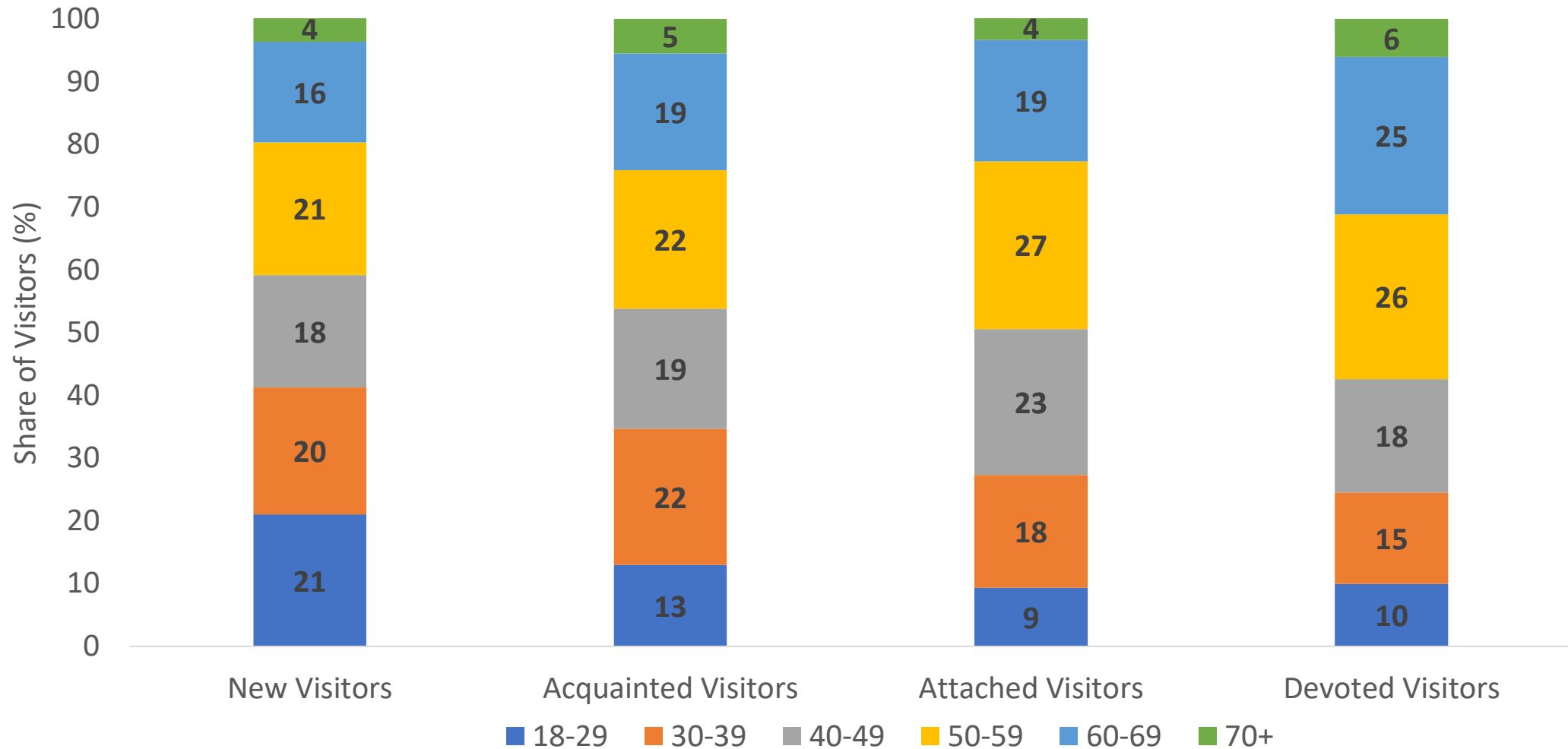




# Business and VFR travel are most heavily repeat visitor oriented. Nearly two thirds of holiday visitors are on their first trip to Solomon Islands



# 57% of visitors in the Devoted Visitor segment are aged fifty or above



# Report Structure



Visitor  
Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
and Impact

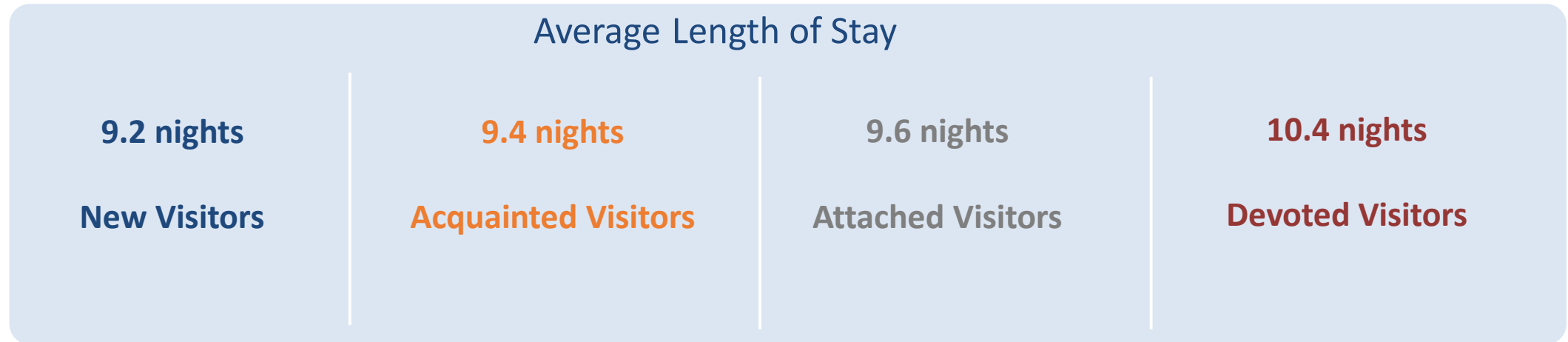


Visitor  
Satisfaction

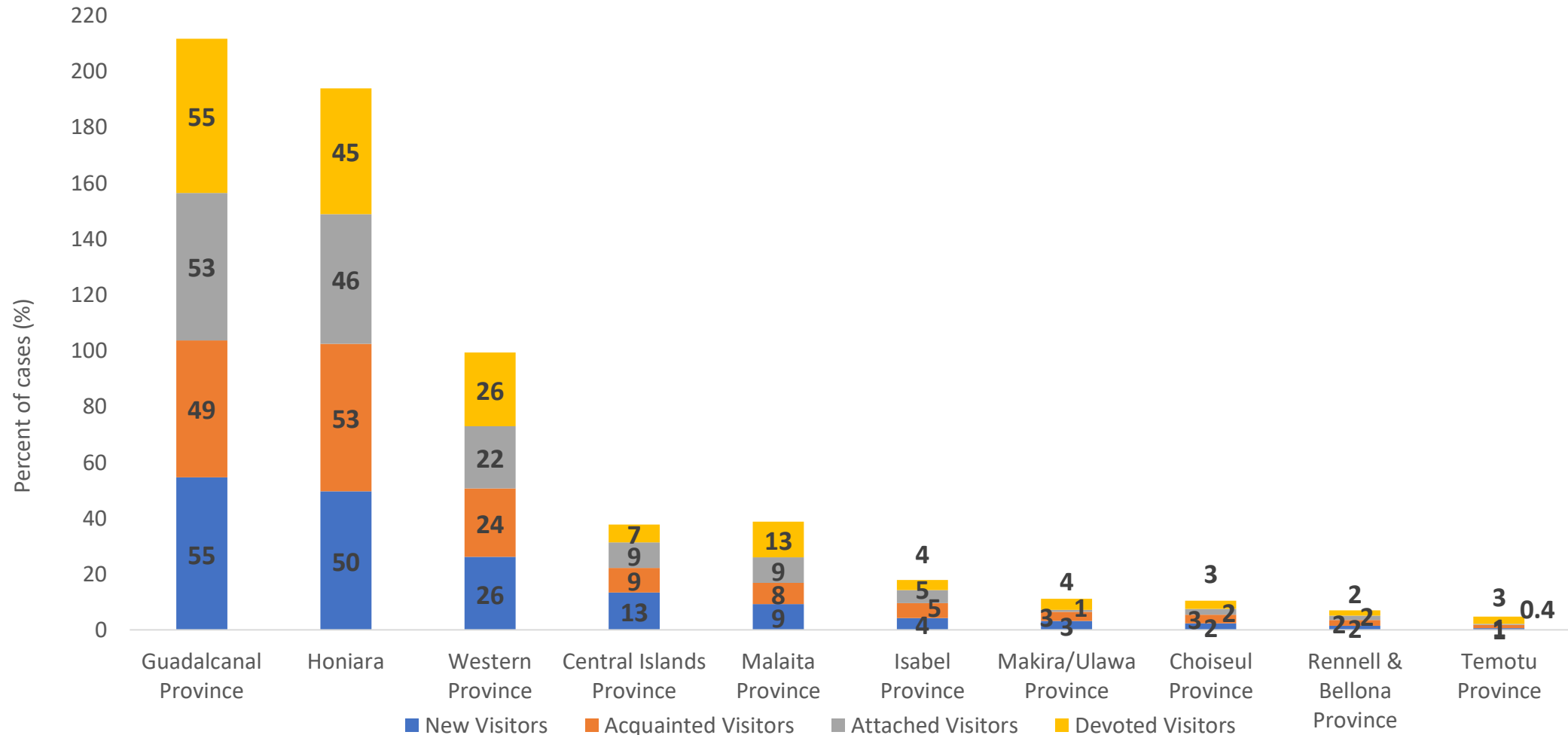
# New Visitors have the highest annual average household income

Average Household Income			
<b>USD 82,665</b>	<b>USD 73,936</b>	<b>USD 70,623</b>	<b>USD 80,468</b>
<b>New Visitors</b>	<b>Acquainted Visitors</b>	<b>Attached Visitors</b>	<b>Devoted Visitors</b>

# Length of stay grows with level of repeat visitation

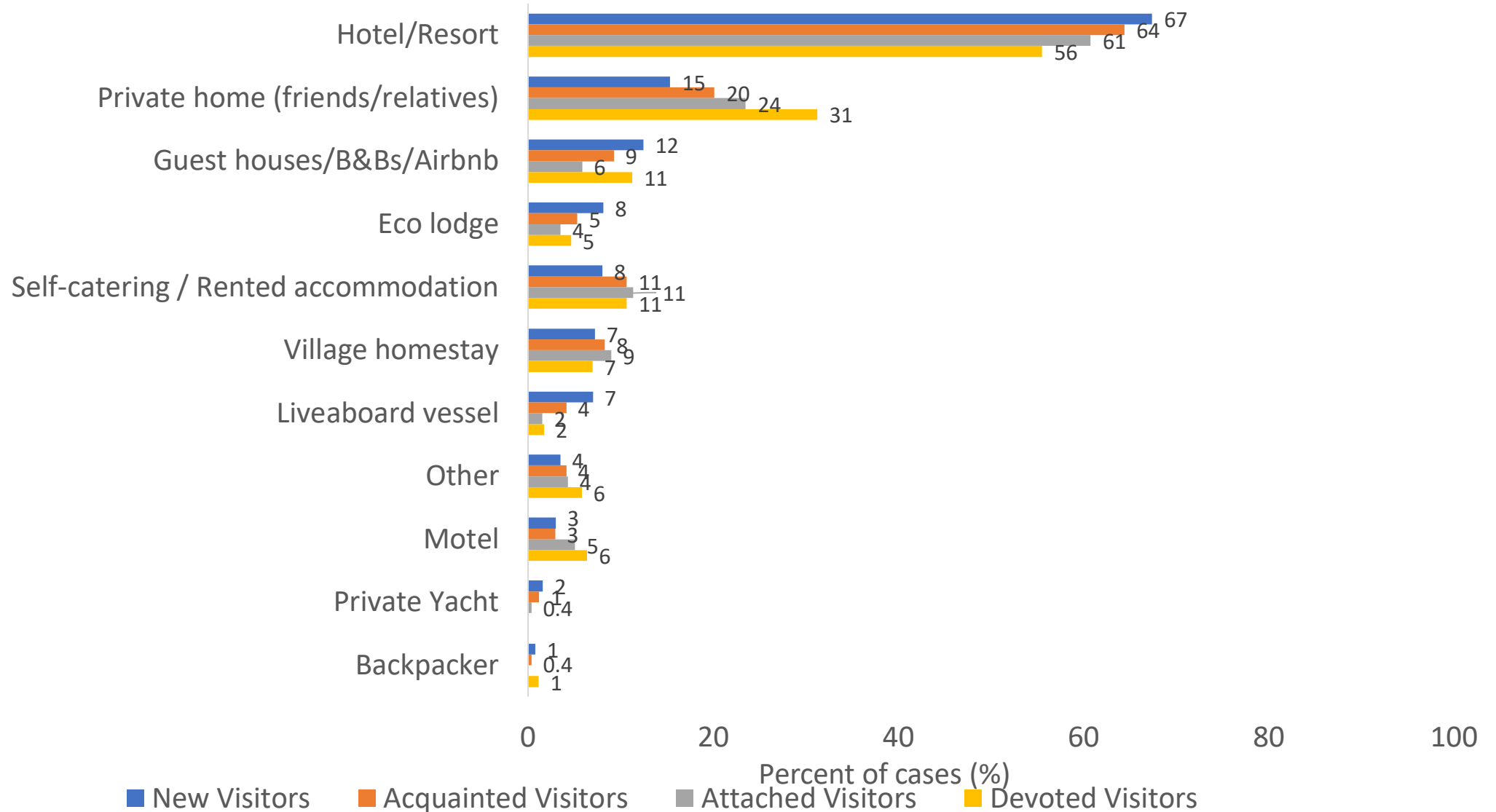


# Guadalcanal and Honiara dominate. Devoted segment visitors are generally more likely to visit outer Provinces (e.g., 13% visit Malaita and 3% Temotu)



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

# Accommodation choice varies across the segments but hotel/resort use dominates for all. Focus on friends and relatives grows with repeat visitation.



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

# Report Structure



Visitor  
Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
and Impact

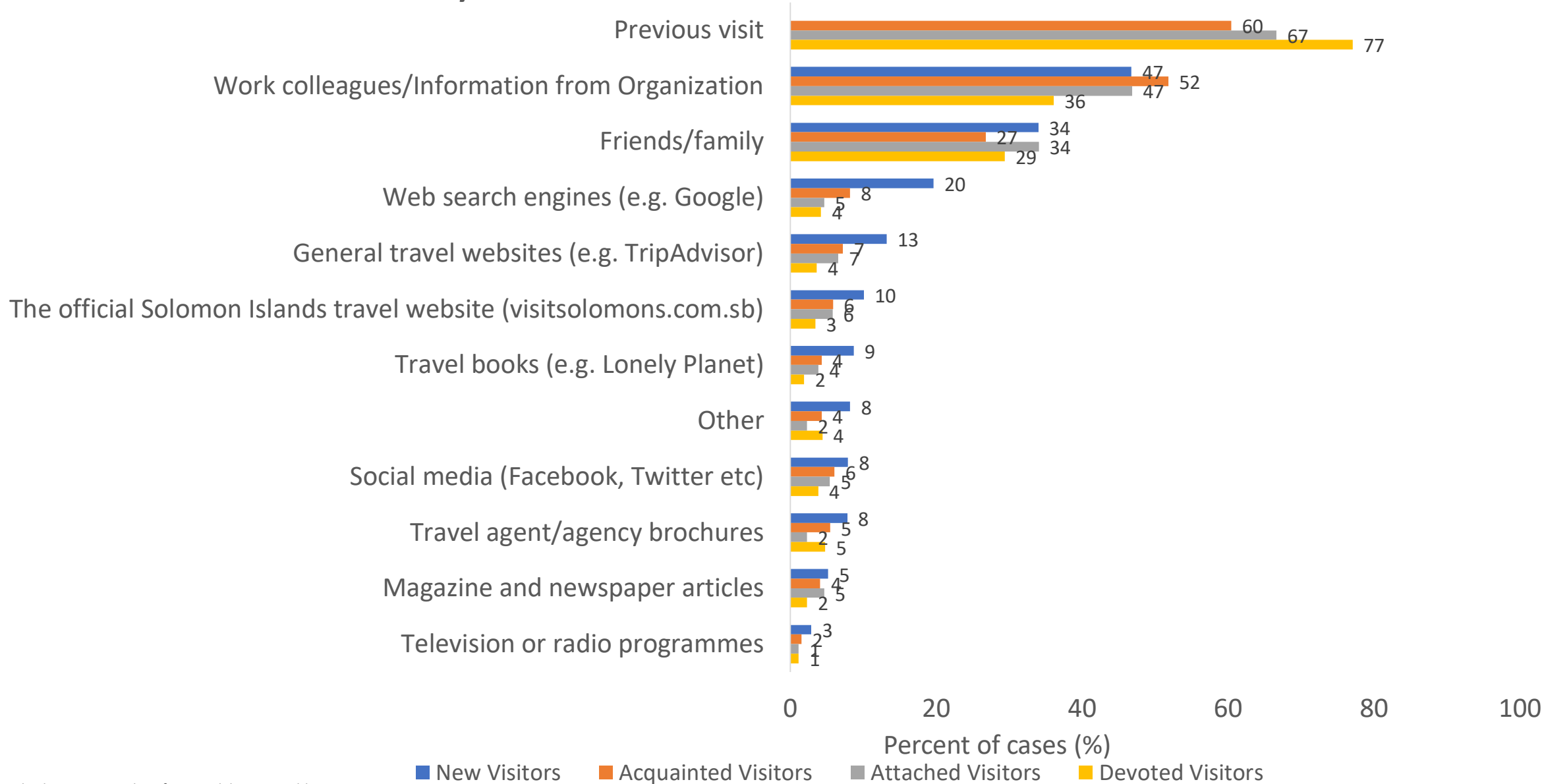


Visitor  
Satisfaction



# Finding out about Solomon Islands

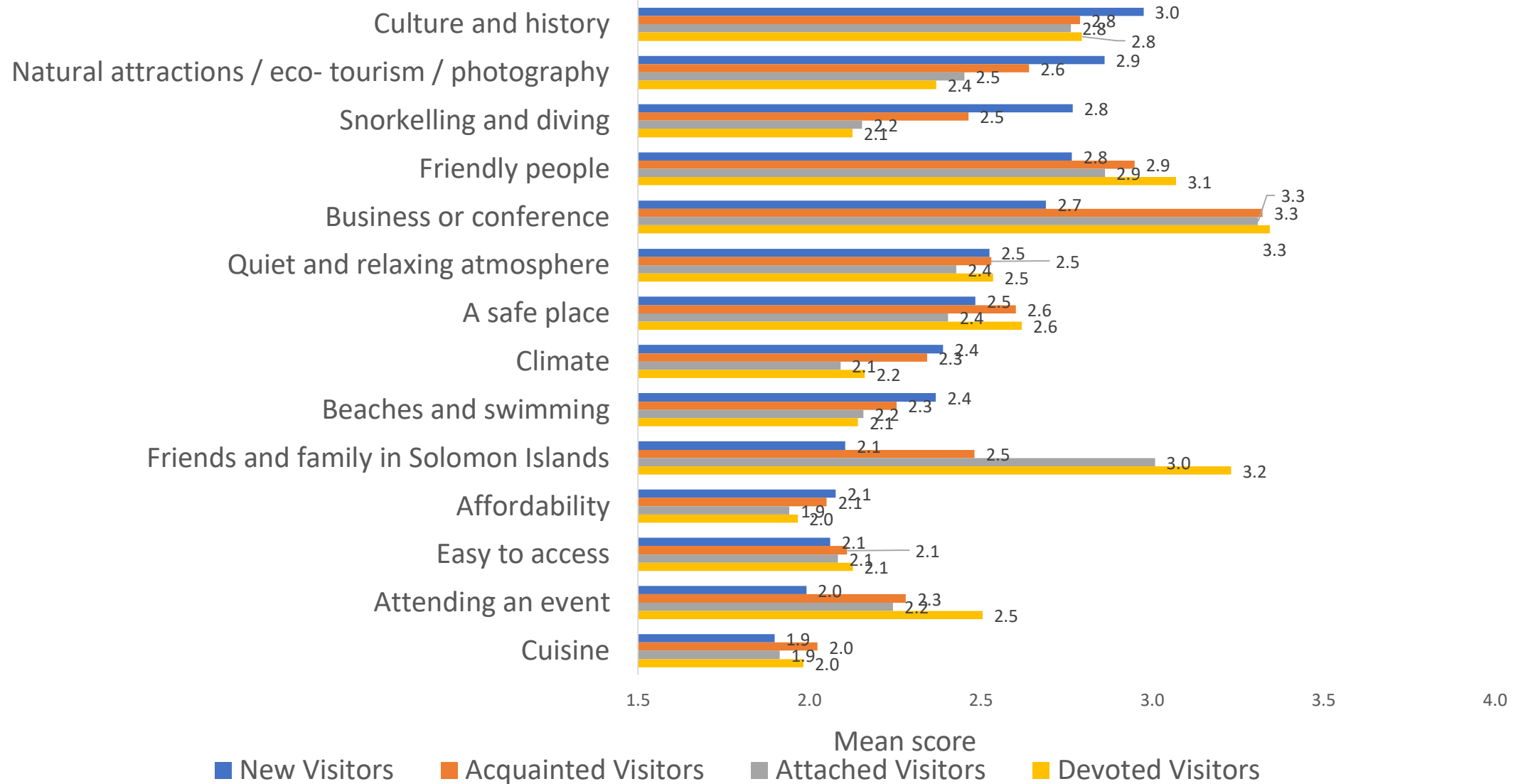
## How did you find out about the Solomon Islands as a destination?



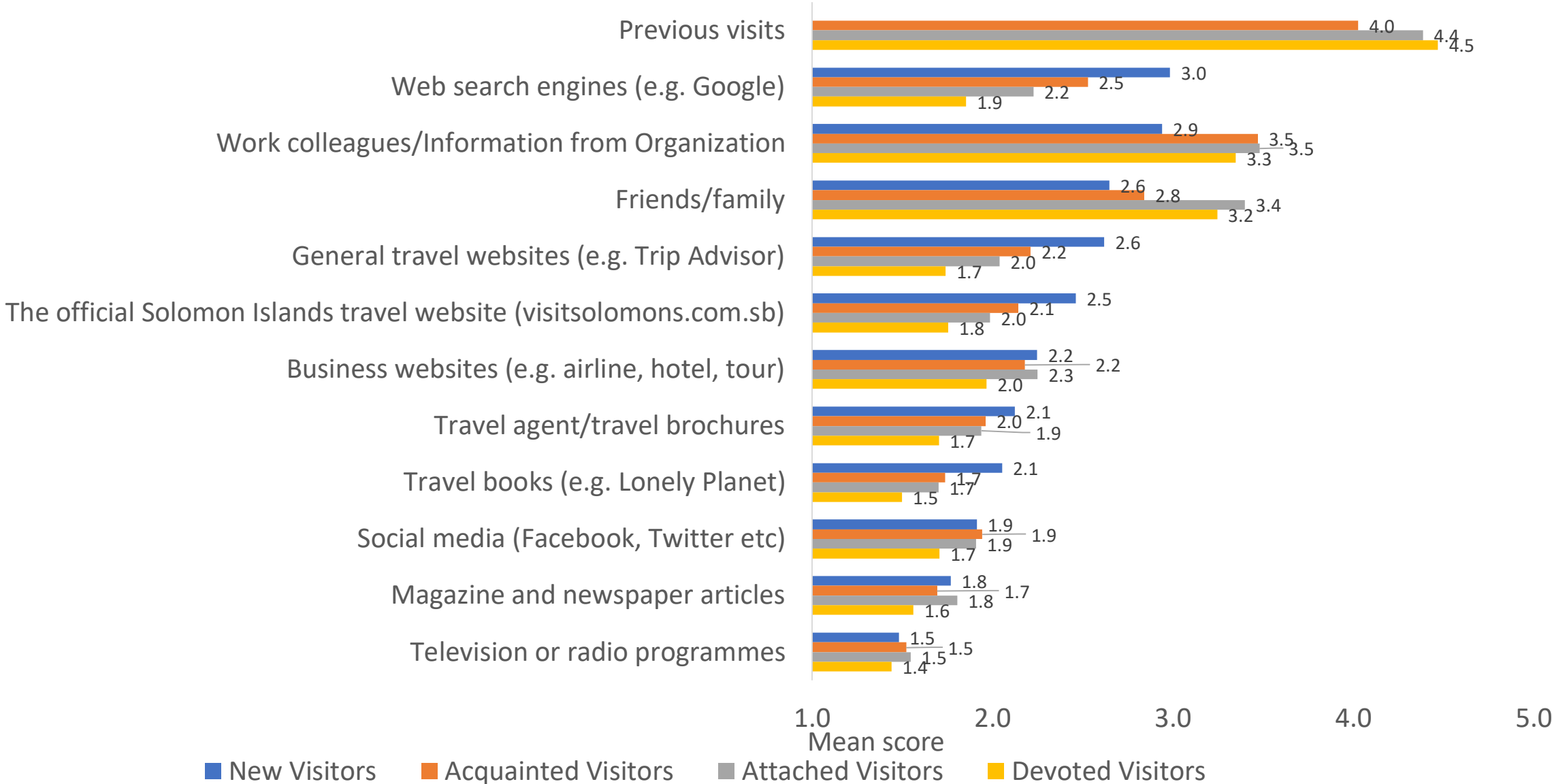
Note: Multiple responses, therefore total does not add up to 100%.

# Business is the dominant influence on repeat visitors coming to Solomon Islands closely followed by VFR for the Attached and Devoted Visitor segments

How influential were the following factors in your choice to visit the Solomon Islands?



# Previous visits is the dominant source of information for repeat visitors when planning their trip to Solomon Islands



# Report Structure



Visitor  
Profile



Visitor  
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Information &  
Decision Making

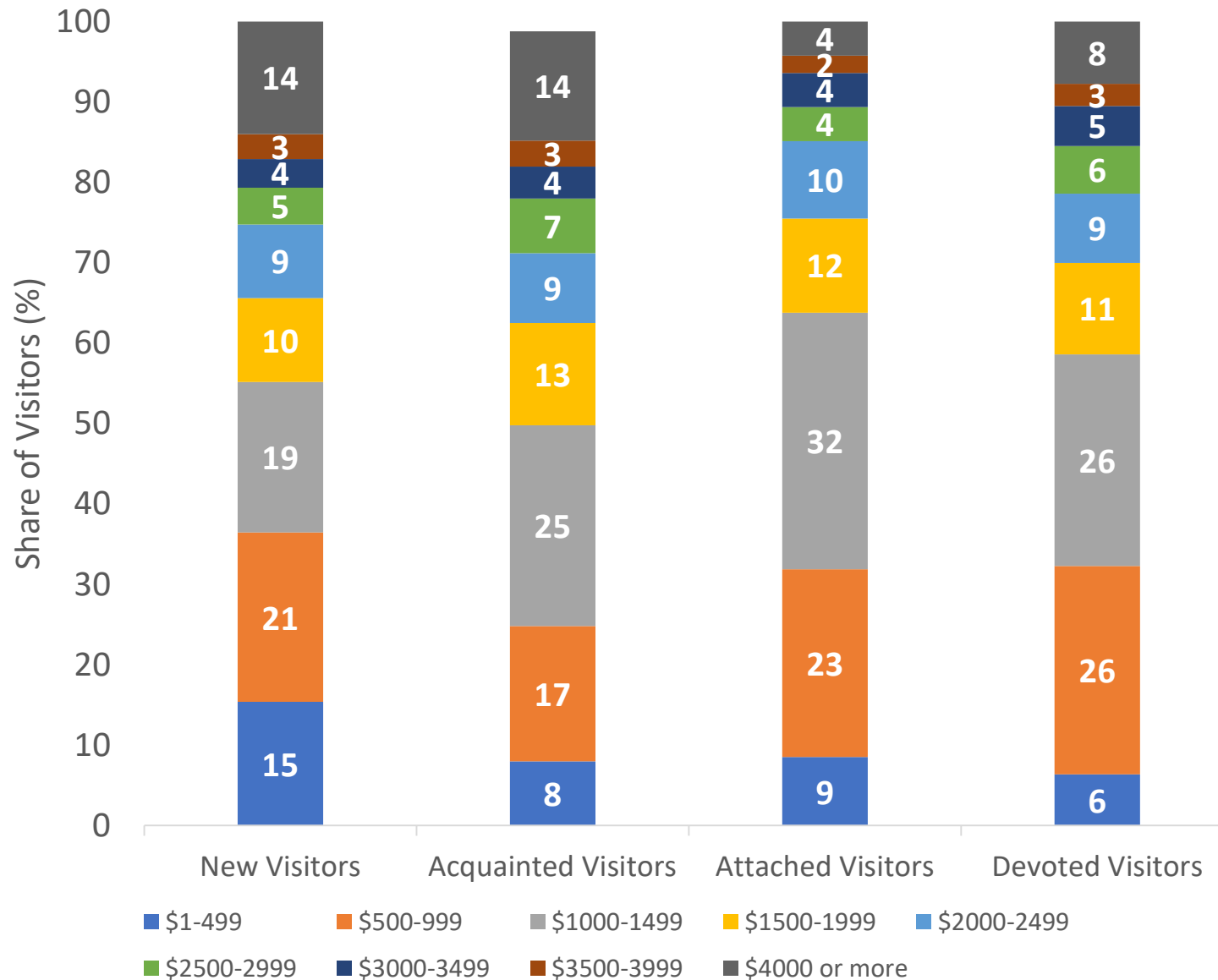


Visitor Spending  
and Impact



Visitor  
Satisfaction

# Acquainted Visitors have the highest pre-paid spend



Average Prepay Per Trip			
US\$ 1,472	US\$ 1,855	US\$ 1,248	US\$ 1,422
New Visitors	Acquainted Visitors	Attached Visitors	Devoted Visitors

# Local Expenditure Per Person Per Day is highest for acquainted visitors

Expenditure Items / Per Person Per Day (US\$)	New Visitors	%	Acquainted Visitors	%	Attached Visitors	%	Devoted Visitors	%
Accommodation	25.4	38	31.2	44	27.1	40	25.4	40
Restaurants, cafes & bars	13.0	19	14.2	20	12.9	19	11.4	18
Domestic flights	4.8	7	4.1	6	4.6	7	4.4	7
Shopping	4.6	7	5.7	8	5.1	8	2.9	5
Groceries	3.3	5	4.3	6	4.8	7	4.9	8
Water activities	3.1	5	1.5	2	1.2	2	1.1	2
Tours and sightseeing	2.8	4	1.3	2	2.0	3	1.2	2
Internet cost	2.2	3	2.9	4	2.4	4	2.2	4
Other	2.1	3	1.7	2	2.3	3	3.0	5
Petrol	1.9	3	0.9	1	1.0	1	2.0	3
Vehicle rental	1.8	3	2.3	3	2.4	4	2.4	4
Land based activities	0.9	1	0.4	1	0.8	1	0.9	1
Public transport	0.7	1	1.1	2	1.4	2	1.1	2
<b>Total</b>	<b>67</b>	<b>100</b>	<b>72</b>	<b>100</b>	<b>68</b>	<b>100</b>	<b>63</b>	<b>100</b>

# Visitor Expenditure – Per Person and Total is highest for acquainted visitors

US\$	New Visitors	Acquainted Visitors	Attached Visitors	Devoted Visitors
<b>Average Spend Prior to arrival</b>				
Per Person - Whole Trip	1,472	1,855	1,248	1,422
<b>Flowing into local economy</b> - Estimated 60% of the pre-paid spend flows into Solomon Islands economy				
Per Person - Whole Trip	883	1,113	749	853
Per Person per Day	96	118	78	82
Length of stay (nights)	9.2	9.4	9.6	10.4
<b>Average Local Spend</b>				
Per Person - Whole Trip	616	677	653	655
Per Person per Day	67	72	68	63
<b>Total spend flowing into Solomon Islands economy – Whole Trip</b>	<b>1,499</b>	<b>1,790</b>	<b>1,402</b>	<b>1,508</b>
<b>Total spend flowing into Solomon Islands economy – Per Day</b>	<b>163</b>	<b>190</b>	<b>146</b>	<b>145</b>

# Holiday visitors only....

US\$	New Visitors	Acquainted Visitors	Attached Visitors	Devoted Visitors
<b>Average Spend Prior to arrival</b>				
Per Person - Whole Trip	2,005	1,919	1,371	1,502
<b>Flowing into local economy</b> - Estimated 60% of the pre-paid spend flows into Solomon Islands economy				
Per Person - Whole Trip	1,203	1,151	823	901
Per Person per Day	134	102	76	73
Length of stay (nights)	9.0	11.3	10.8	12.4
<b>Average Local Spend</b>				
Per Person - Whole Trip	567	452	443	446
Per Person per Day	63	40	41	36
<b>Total spend flowing into Solomon Islands economy – Whole Trip</b>	<b>1,770</b>	<b>1,603</b>	<b>1,266</b>	<b>1,347</b>
<b>Total spend flowing into Solomon Islands economy – Per Day</b>	<b>197</b>	<b>142</b>	<b>117</b>	<b>109</b>



# Report Structure



Visitor  
Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

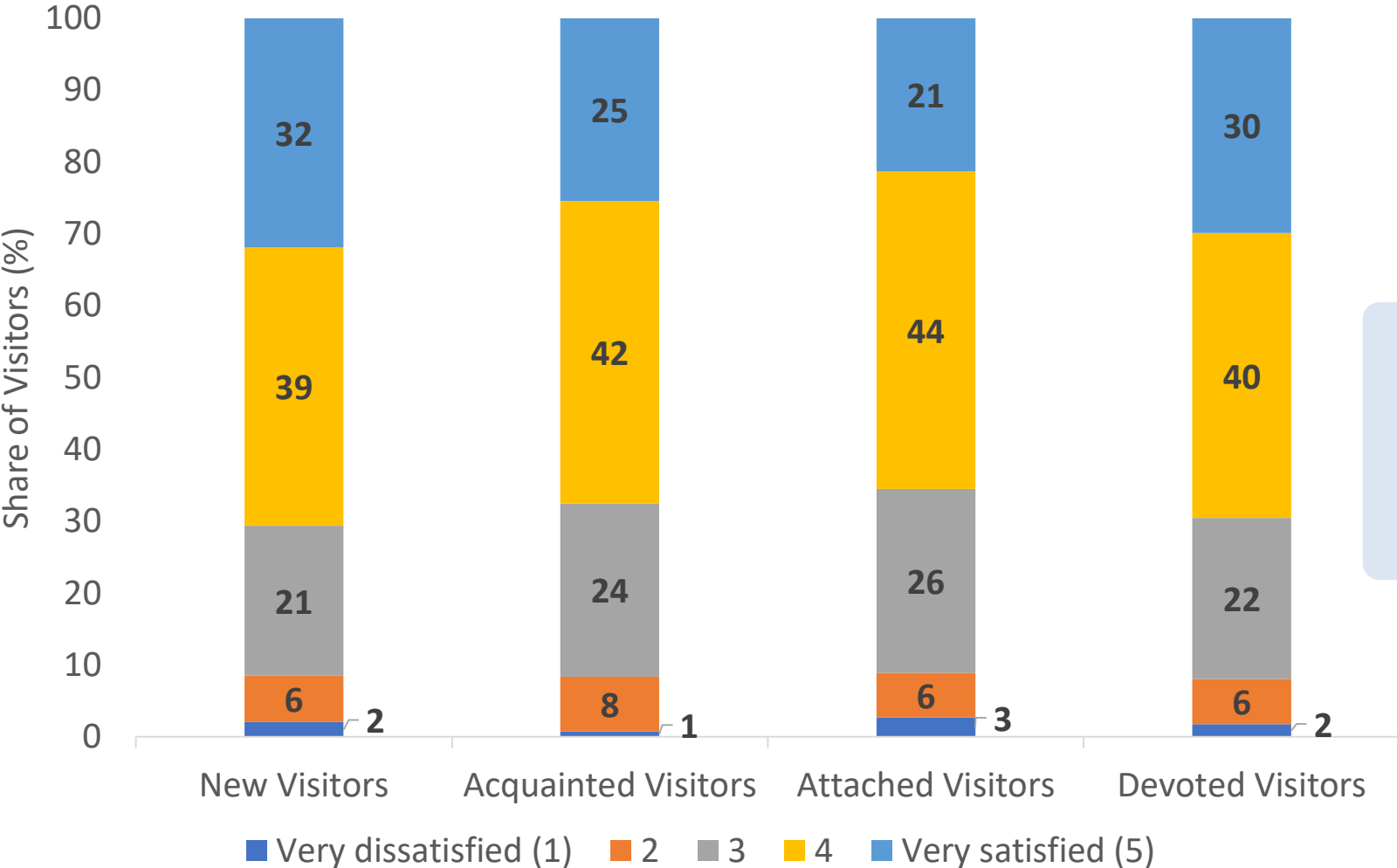


Visitor Spending  
and Impact



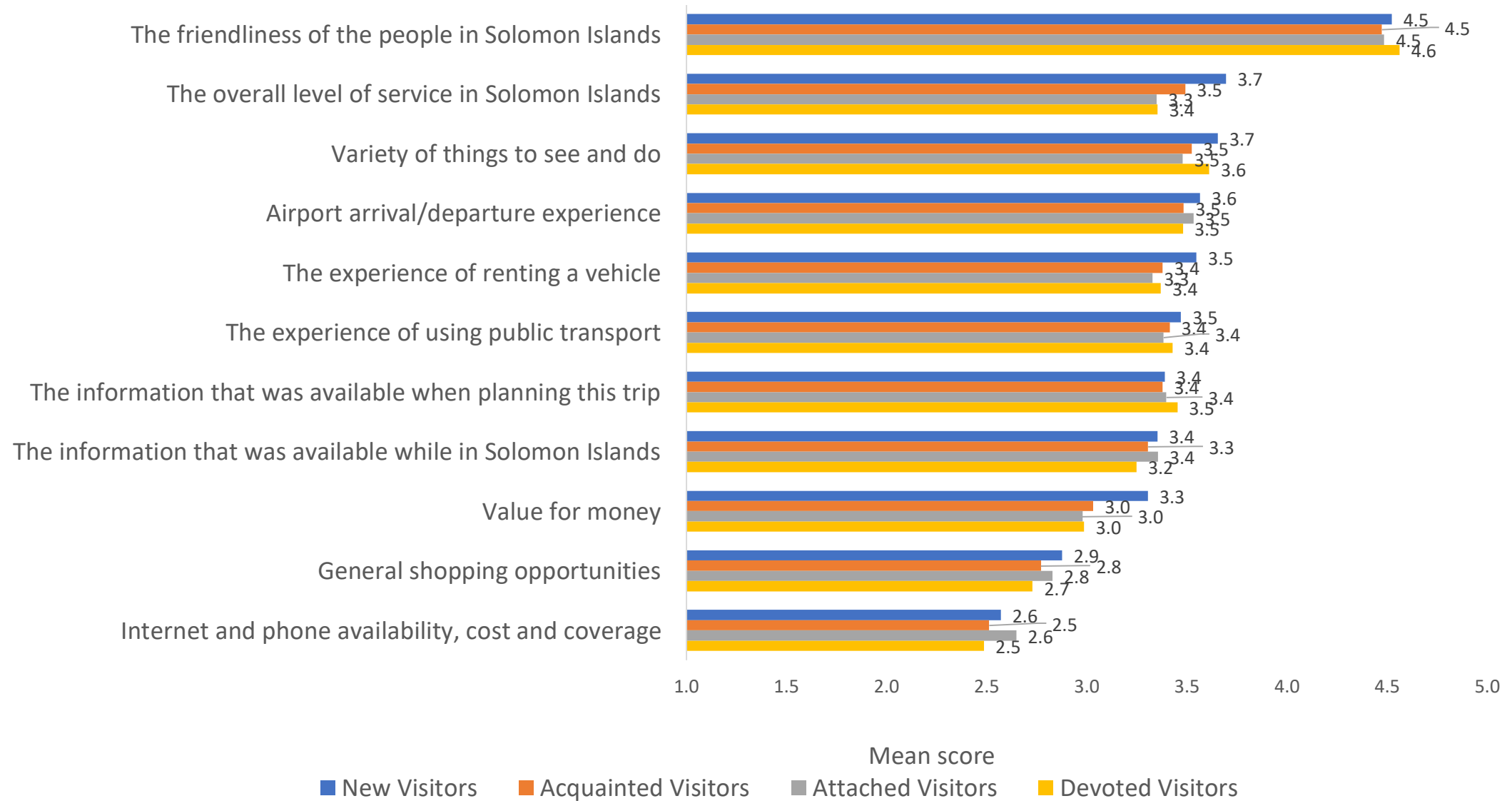
Visitor  
Satisfaction

# Overall satisfaction is highest for new visitors, followed by the devoted segment

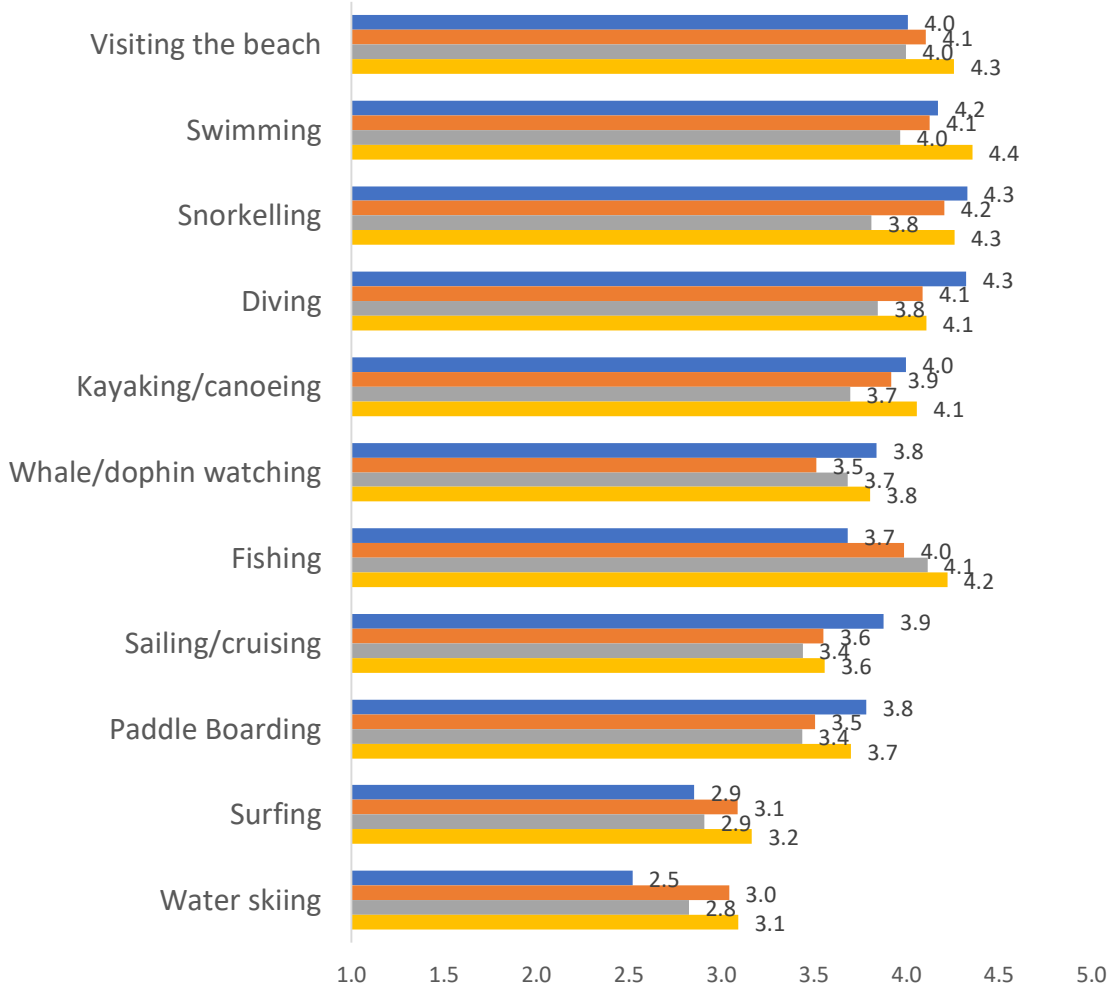
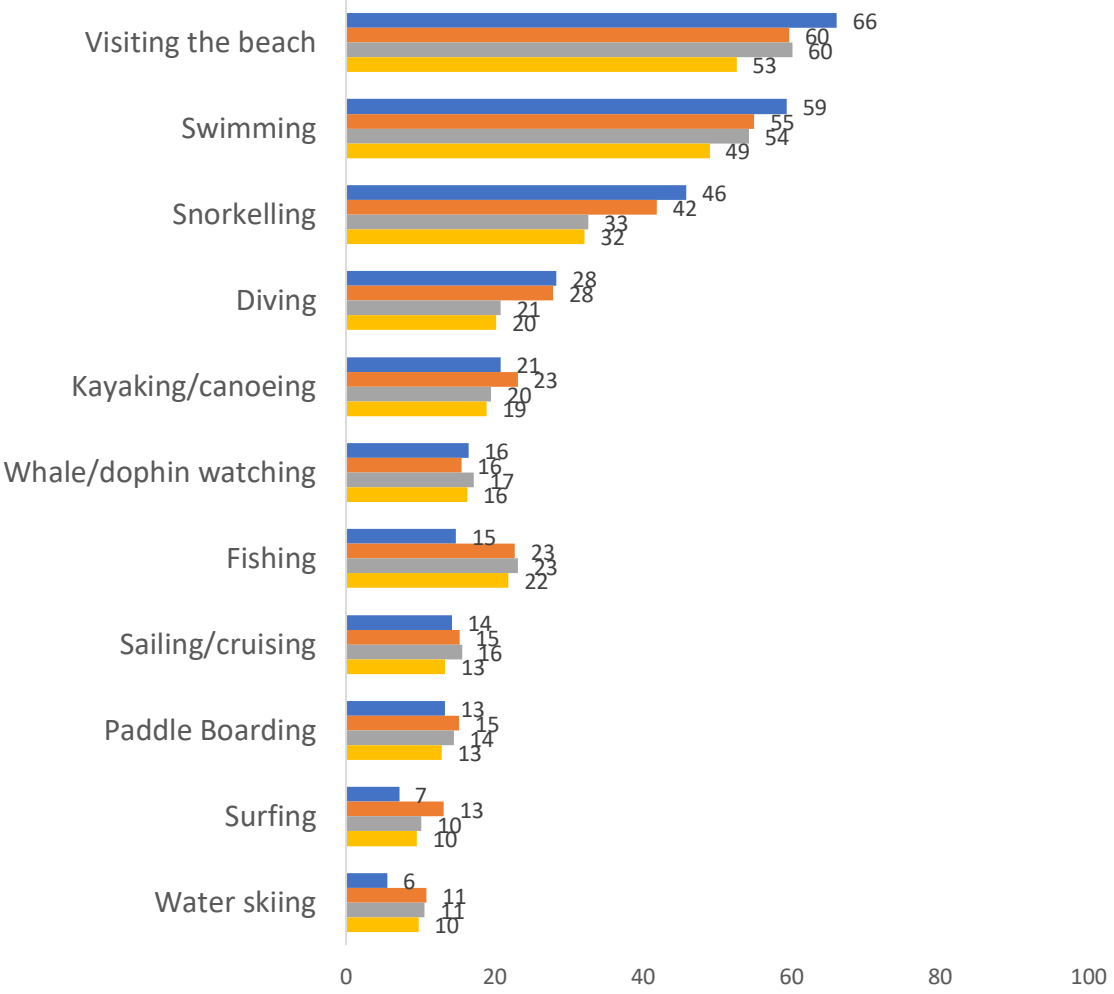


MEAN OF OVERALL SATISFACTION			
3.9	3.8	3.8	3.9
New Visitors	Acquainted Visitors	Attached Visitors	Devoted Visitors

# Overall satisfaction with service level decreases with the number of visits as does perception of value for money

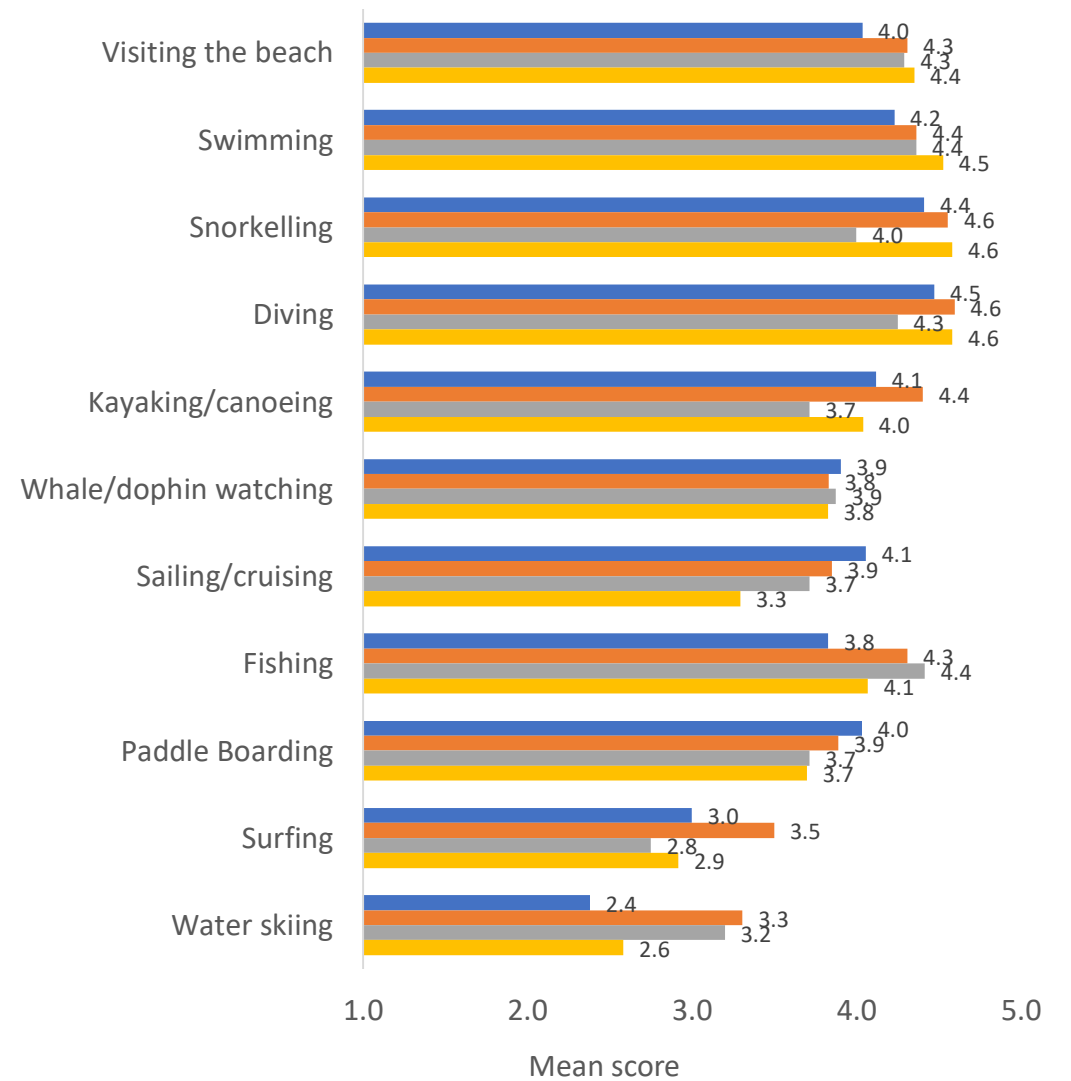
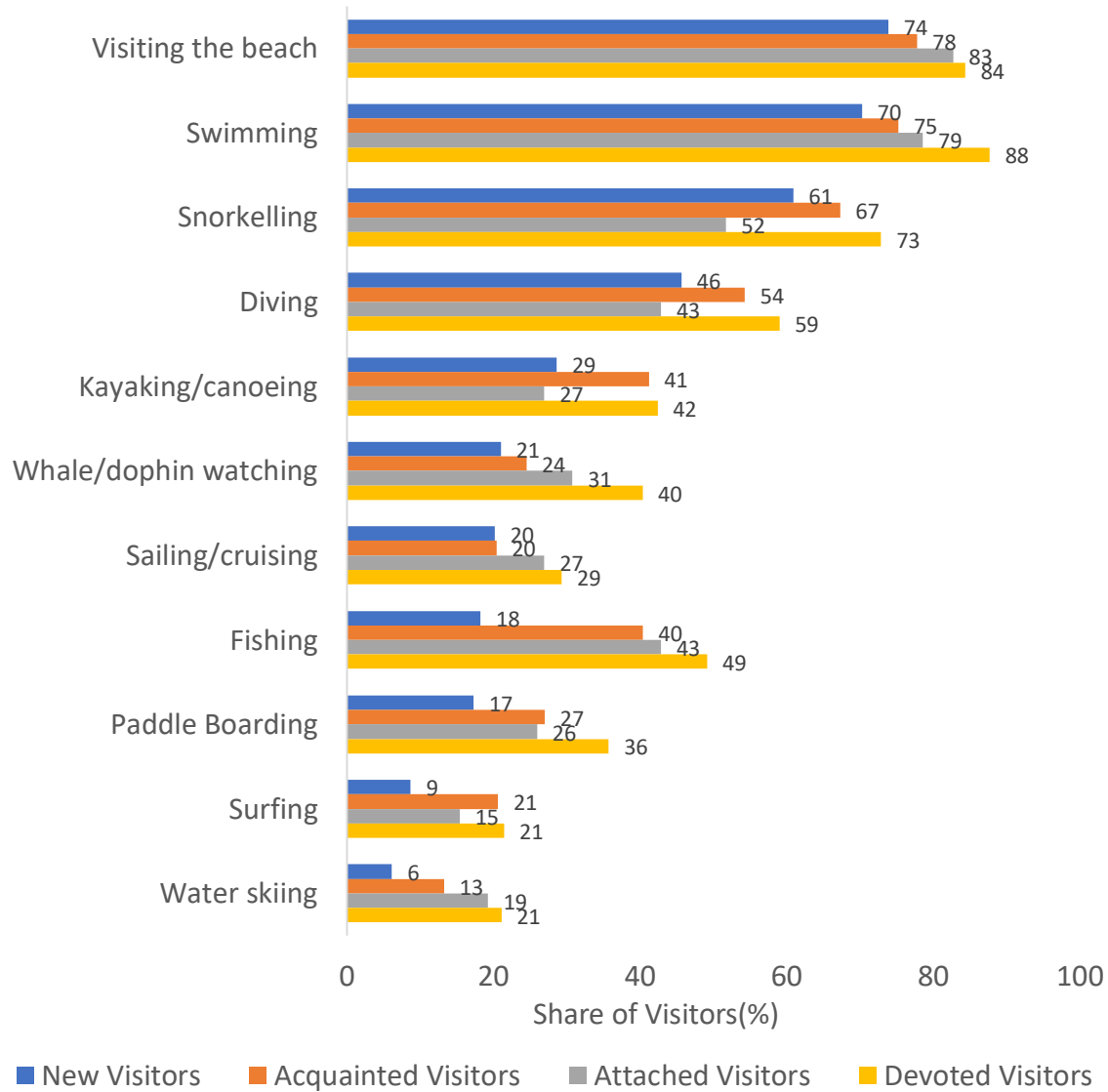


# Water-based Activities

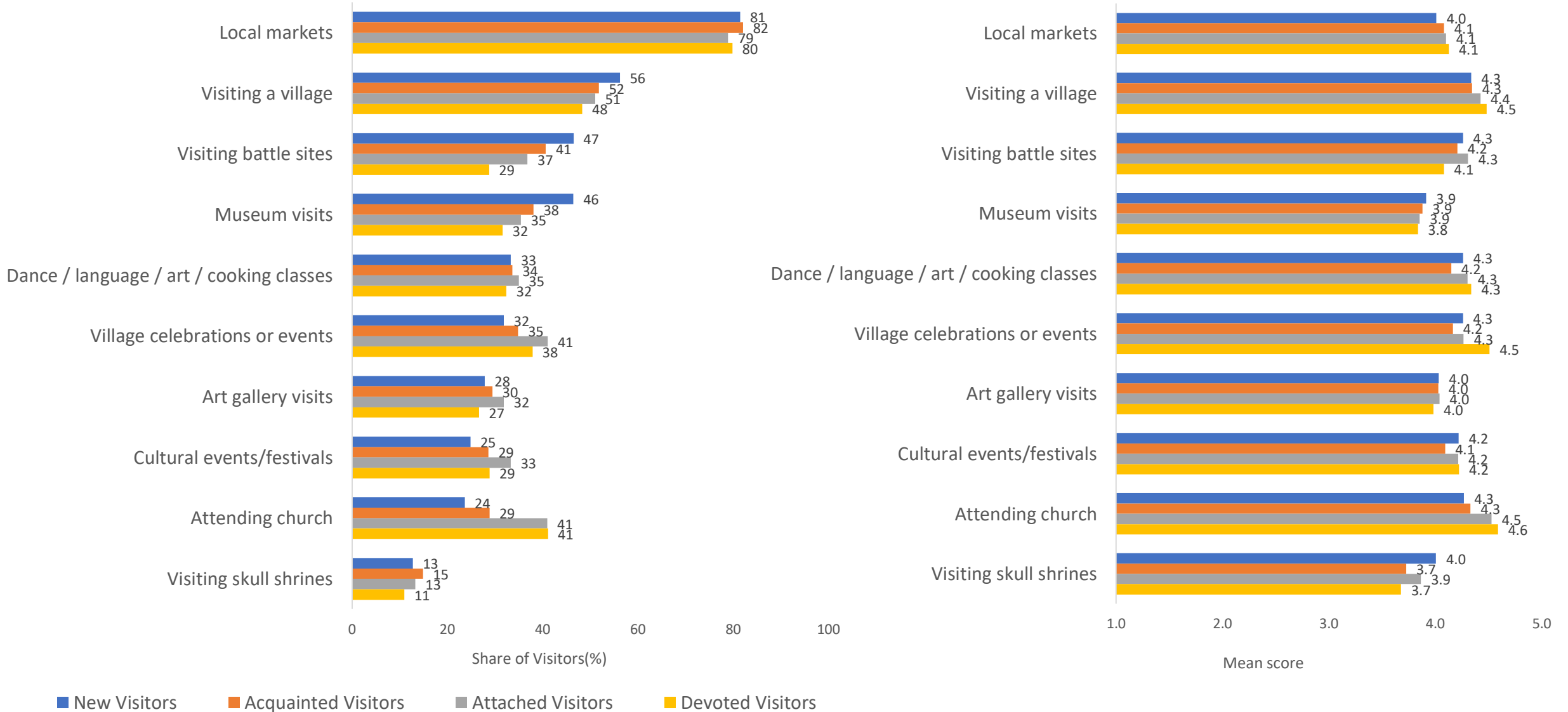


■ New Visitors ■ Acquainted Visitors ■ Attached Visitors ■ Devoted Visitors

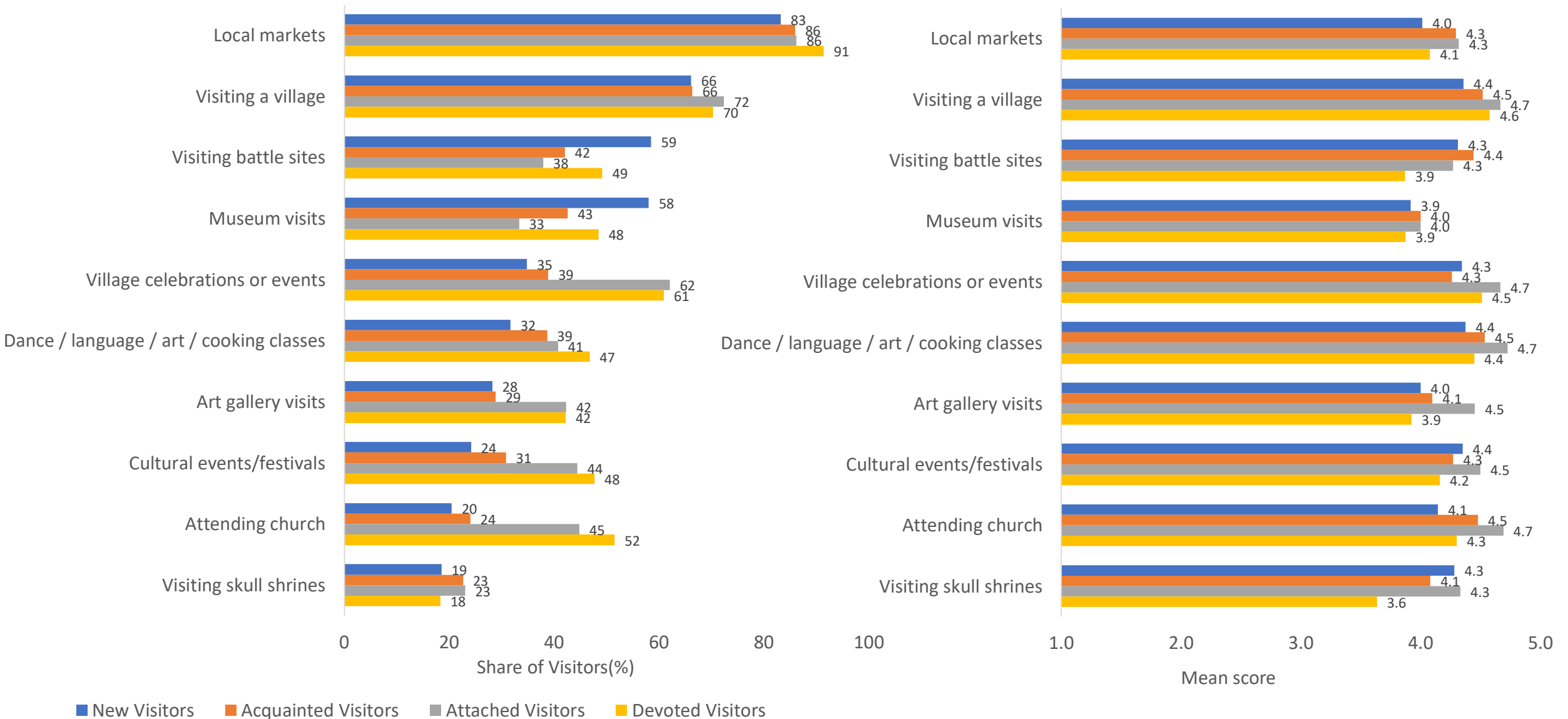
# Water-based Activities: Holiday Only



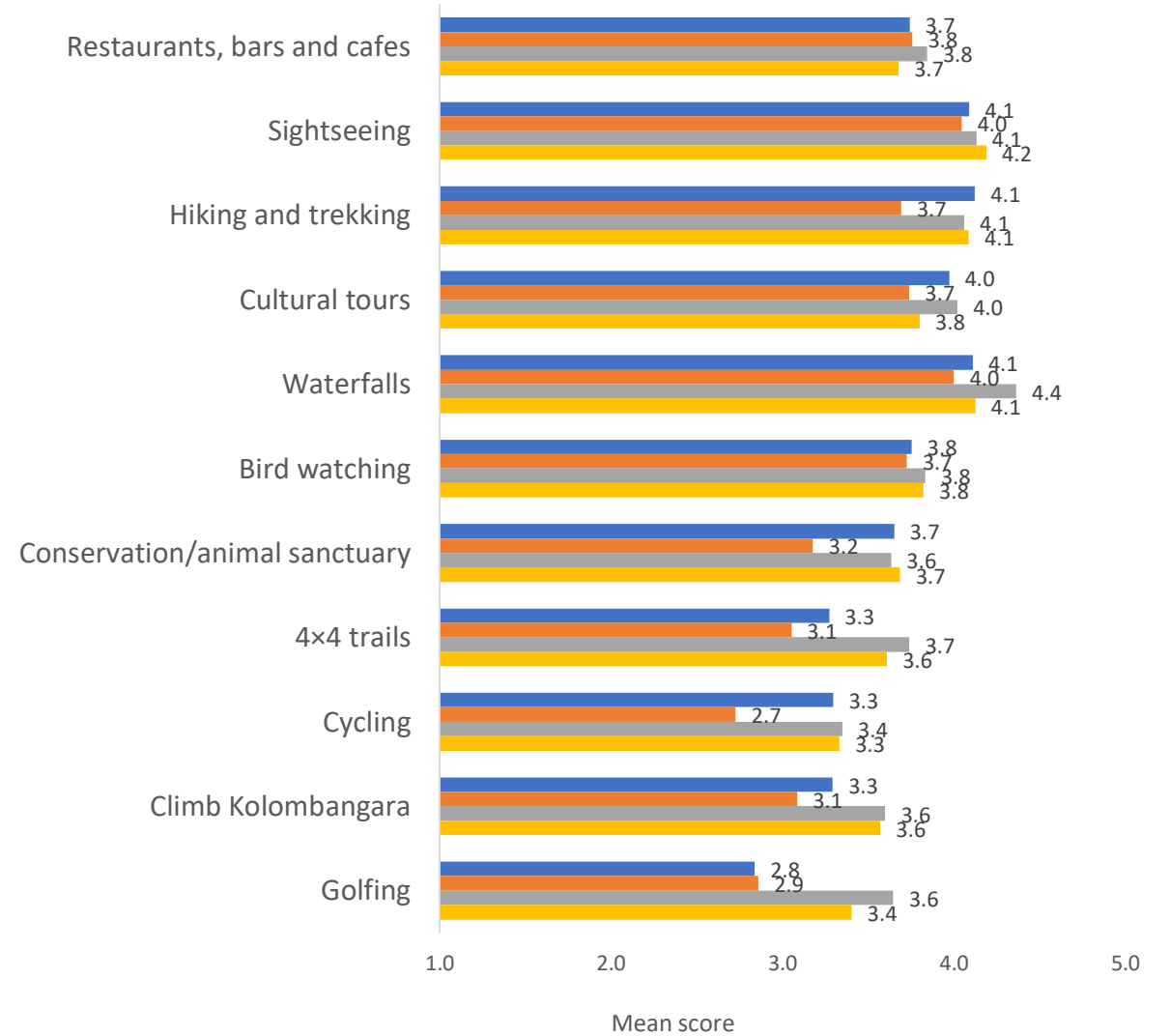
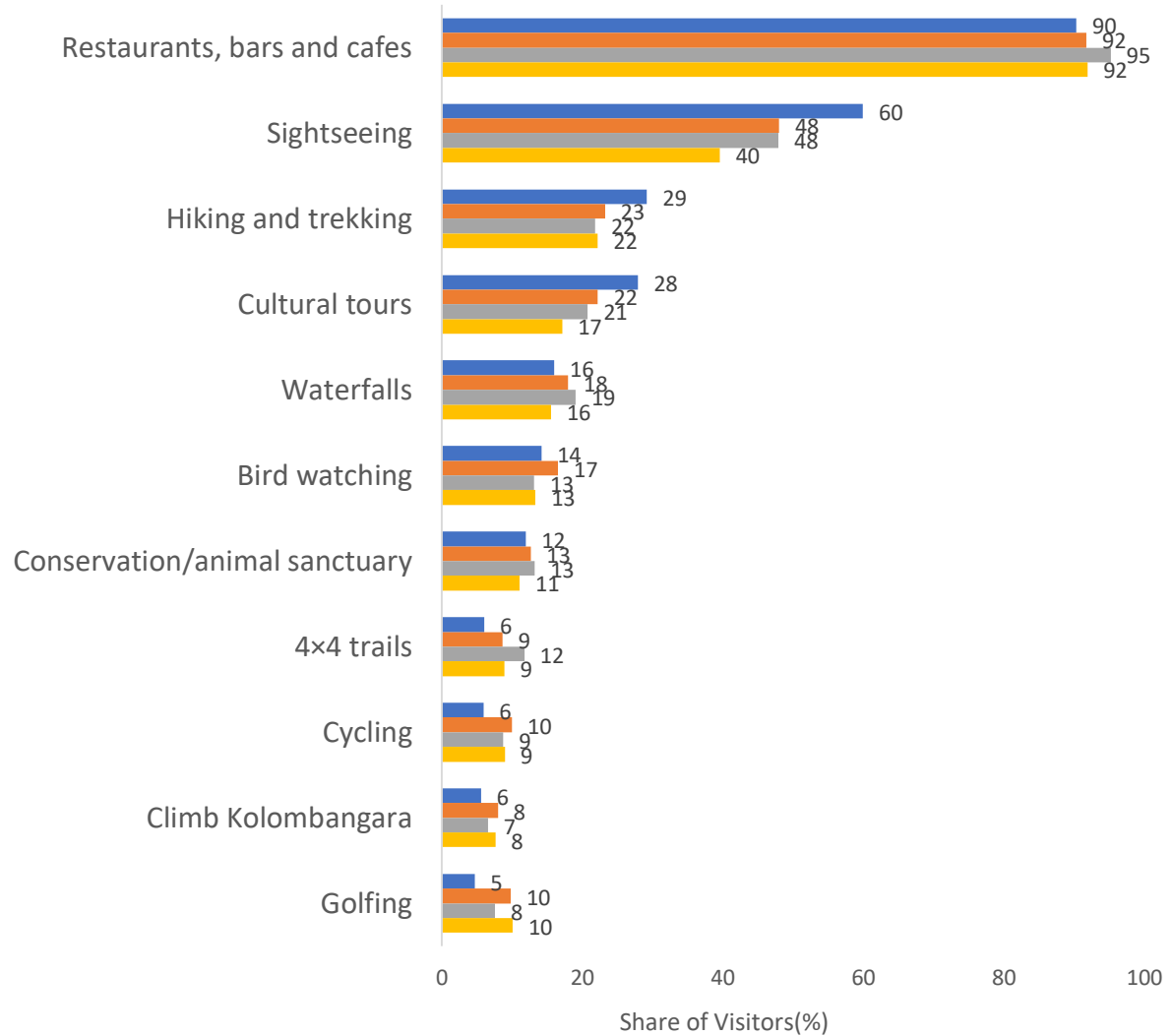
# Cultural Interaction



# Cultural Interaction: Holiday Only



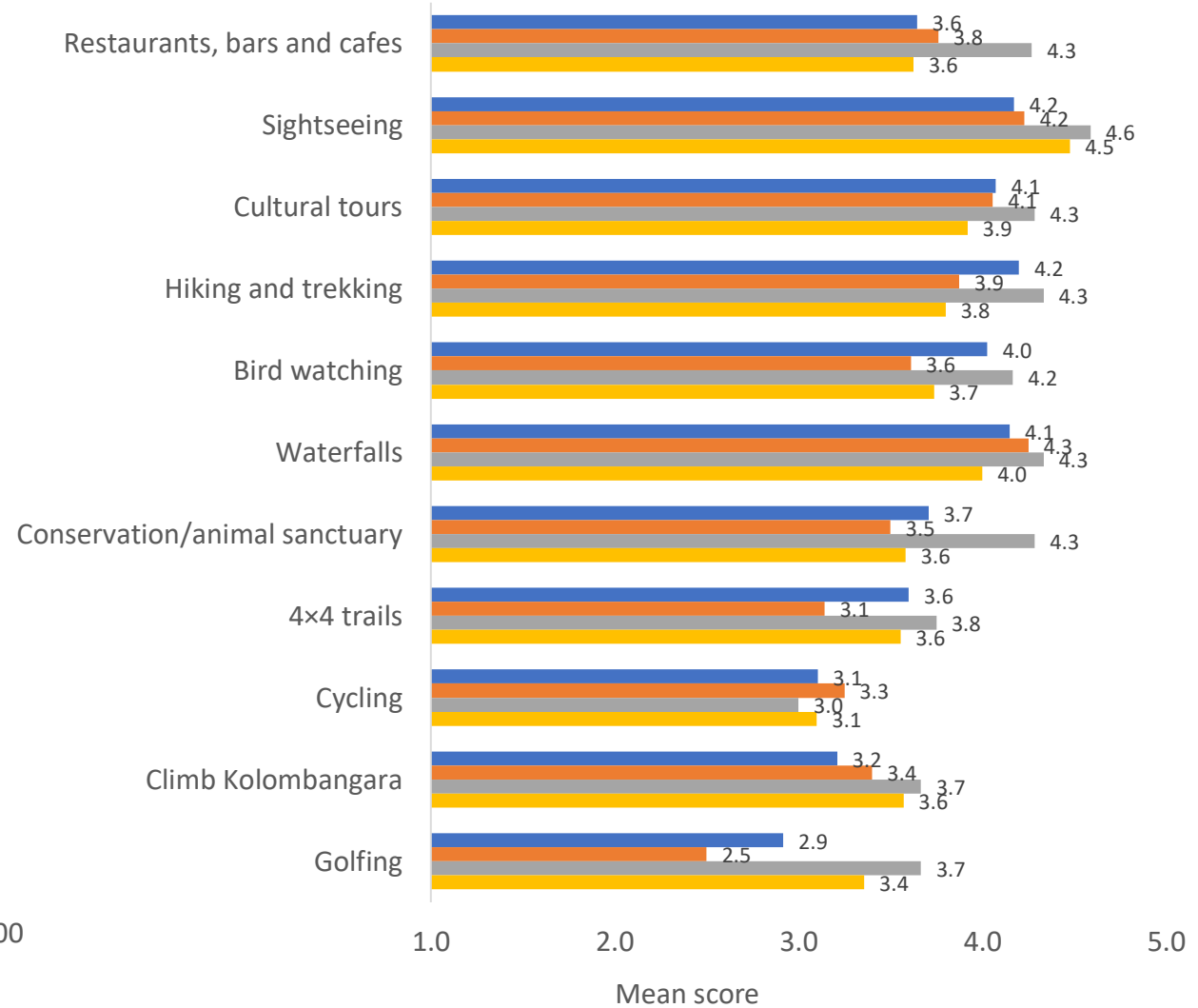
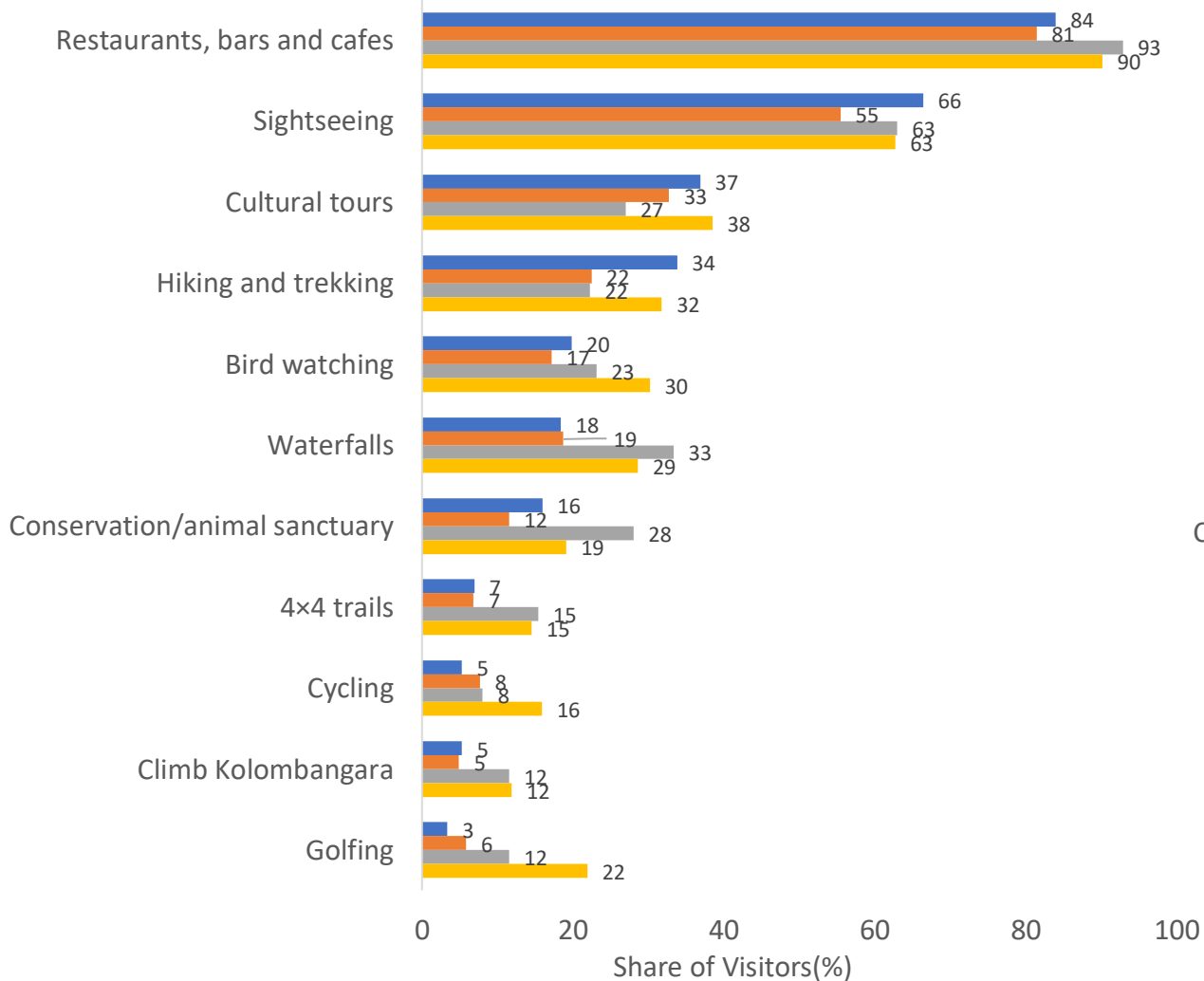
# Land-based Activities



■ New Visitors   
 ■ Acquainted Visitors   
 ■ Attached Visitors   
 ■ Devoted Visitors

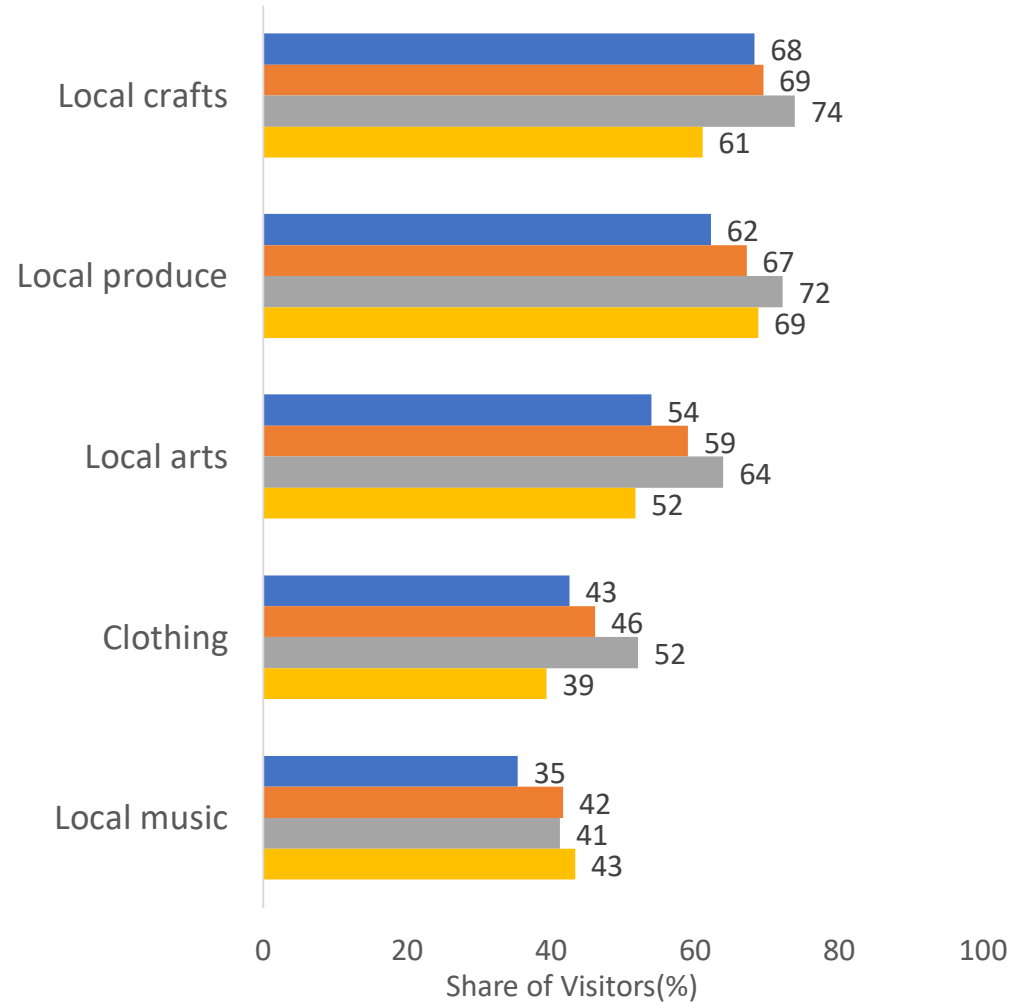


# Land-based Activities: Holiday Only

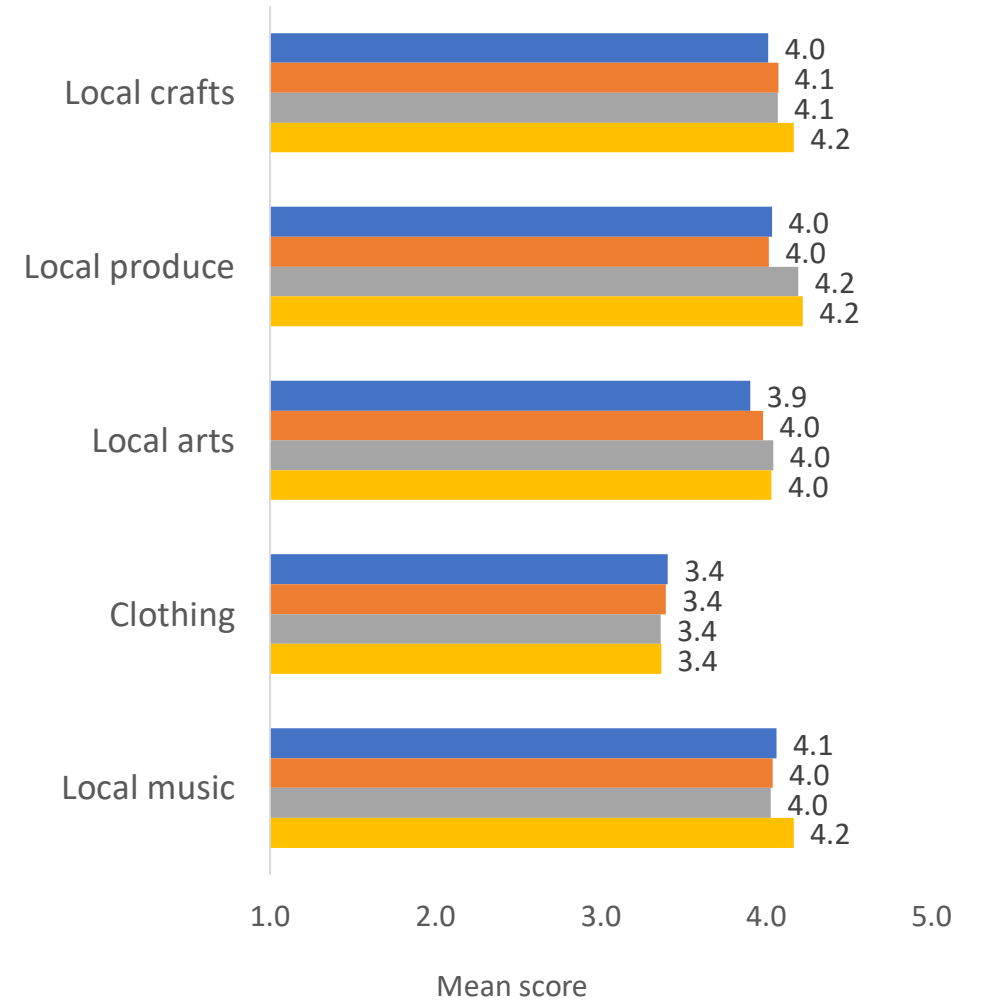


■ New Visitors  
 ■ Acquainted Visitors  
 ■ Attached Visitors  
 ■ Devoted Visitors

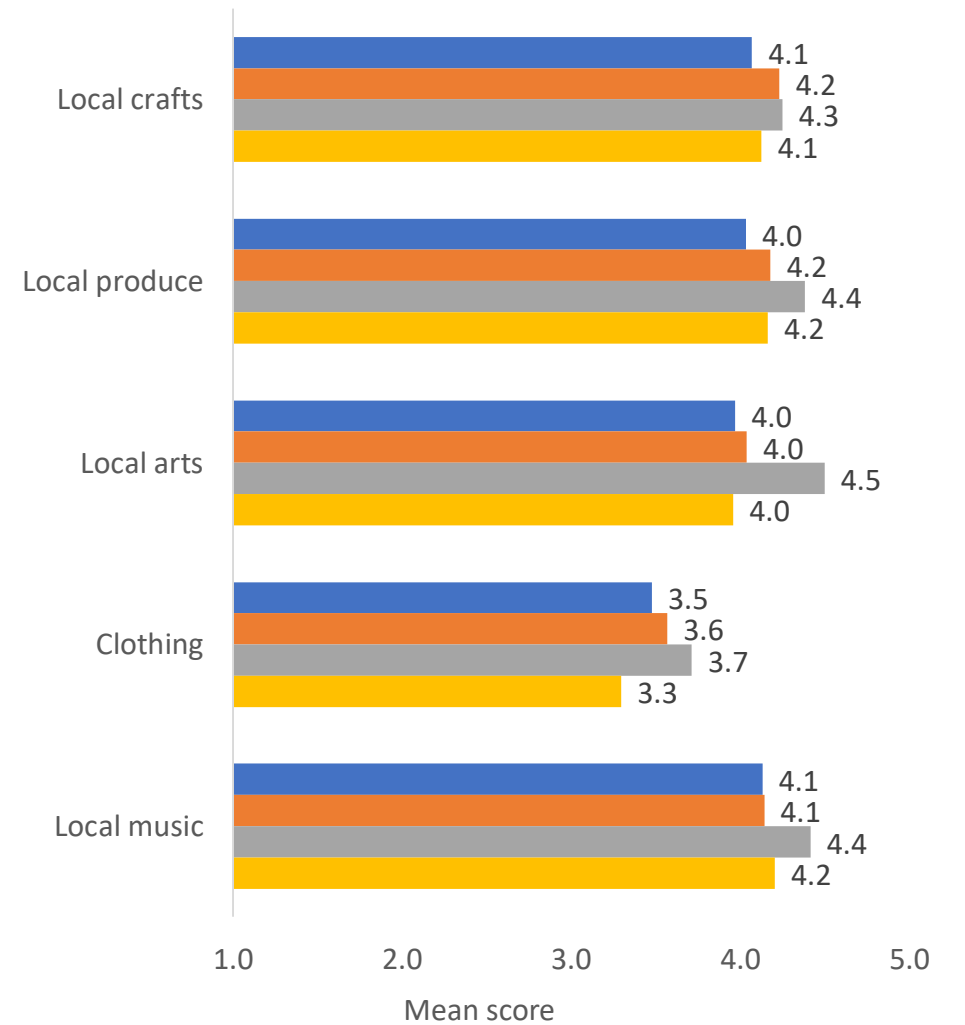
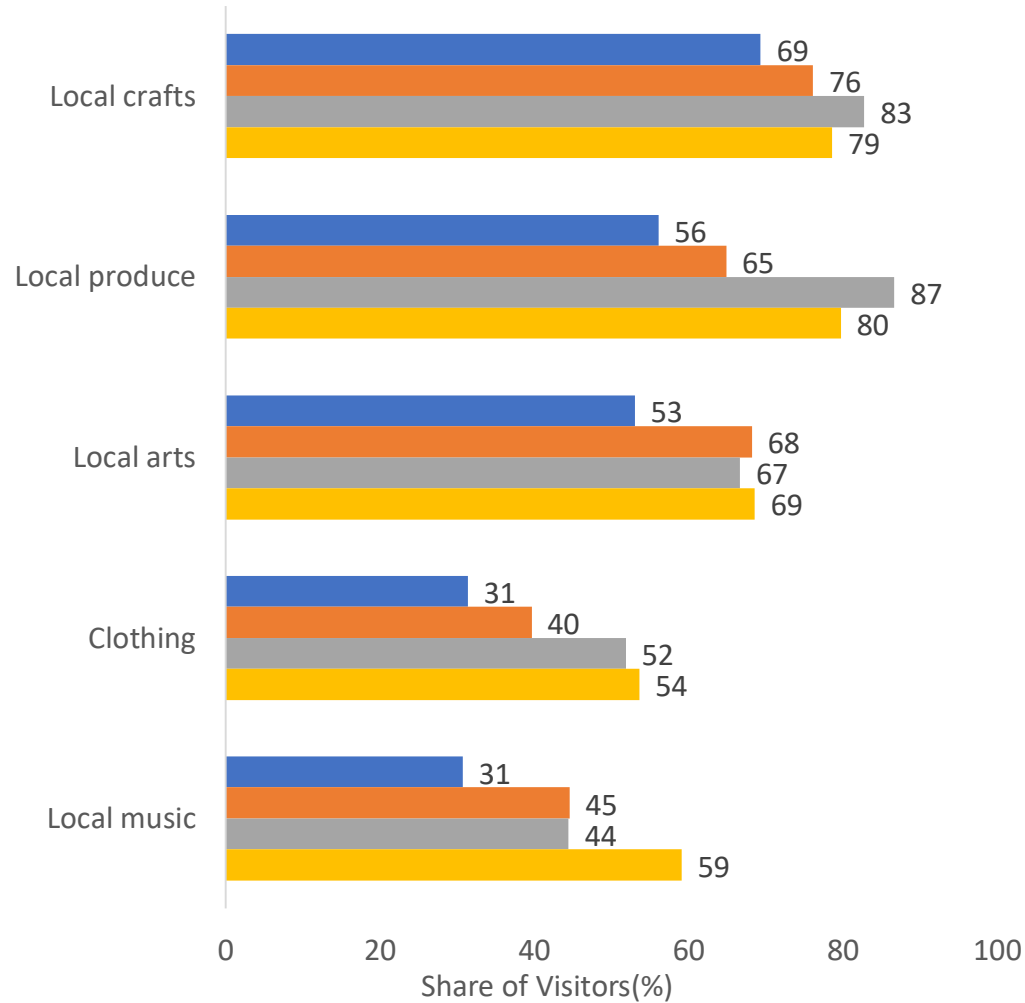
# Shopping activities



■ New Visitors ■ Acquainted Visitors ■ Attached Visitors ■ Devoted Visitors

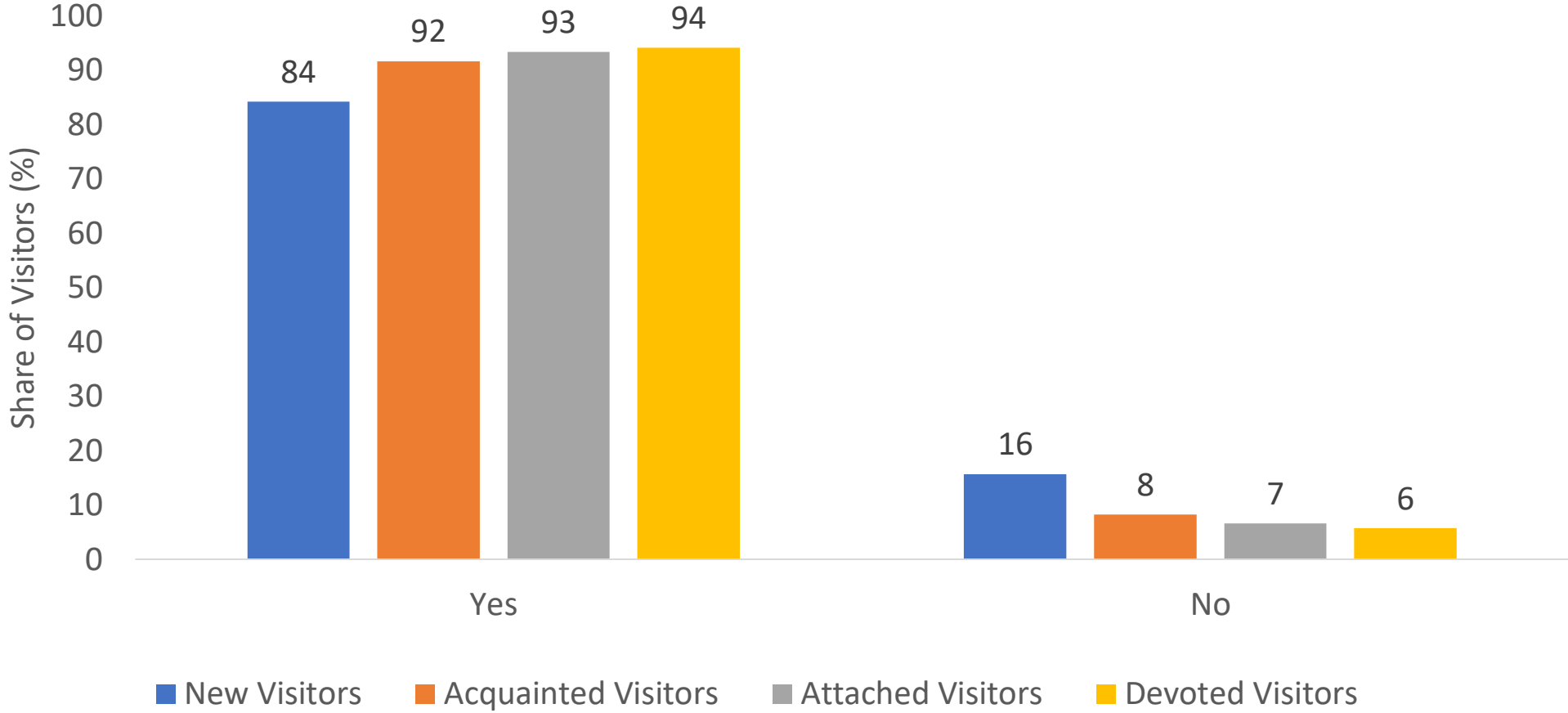


# Shopping activities: Holiday Only

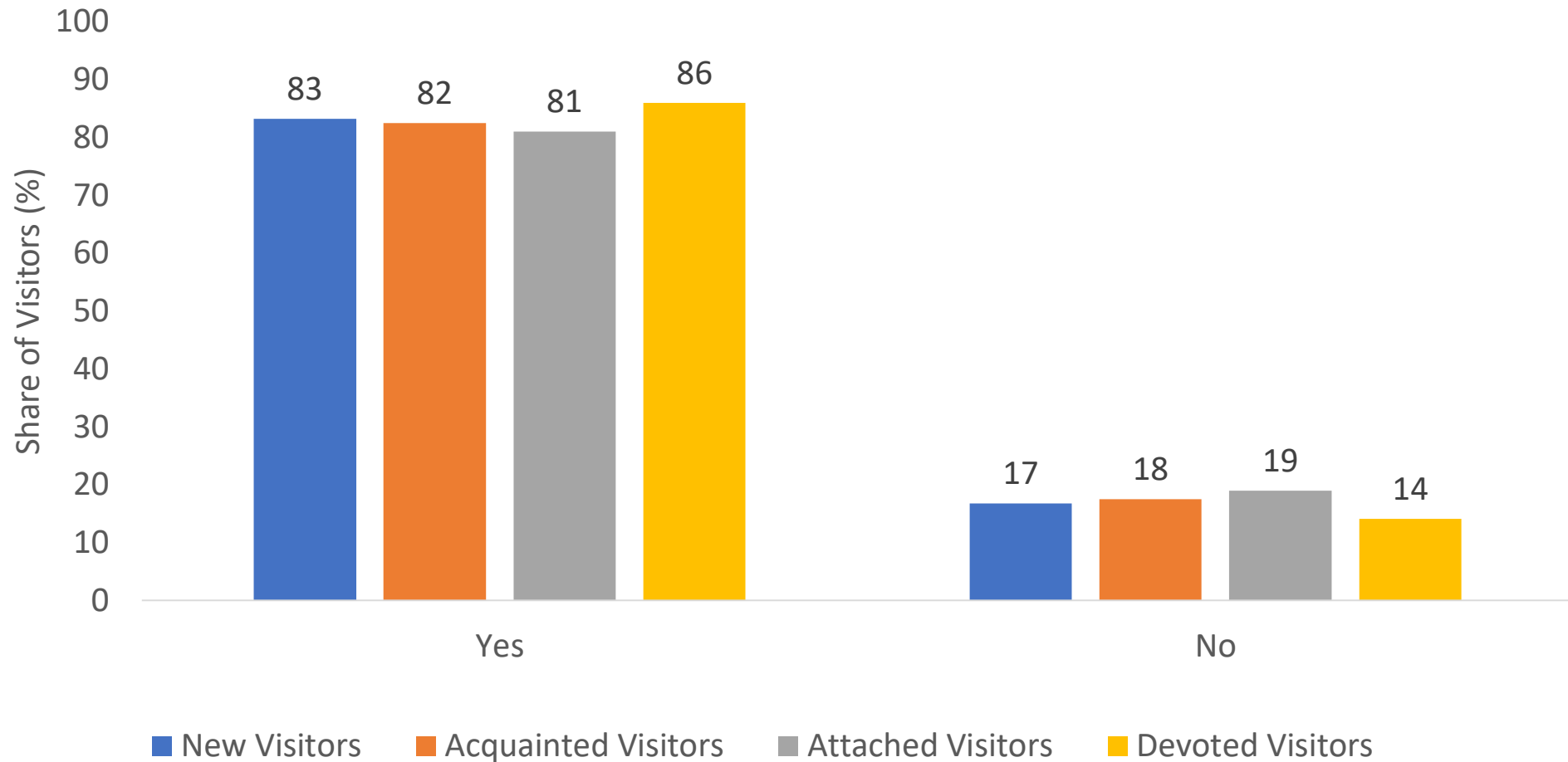


■ New Visitors ■ Acquainted Visitors ■ Attached Visitors ■ Devoted Visitors

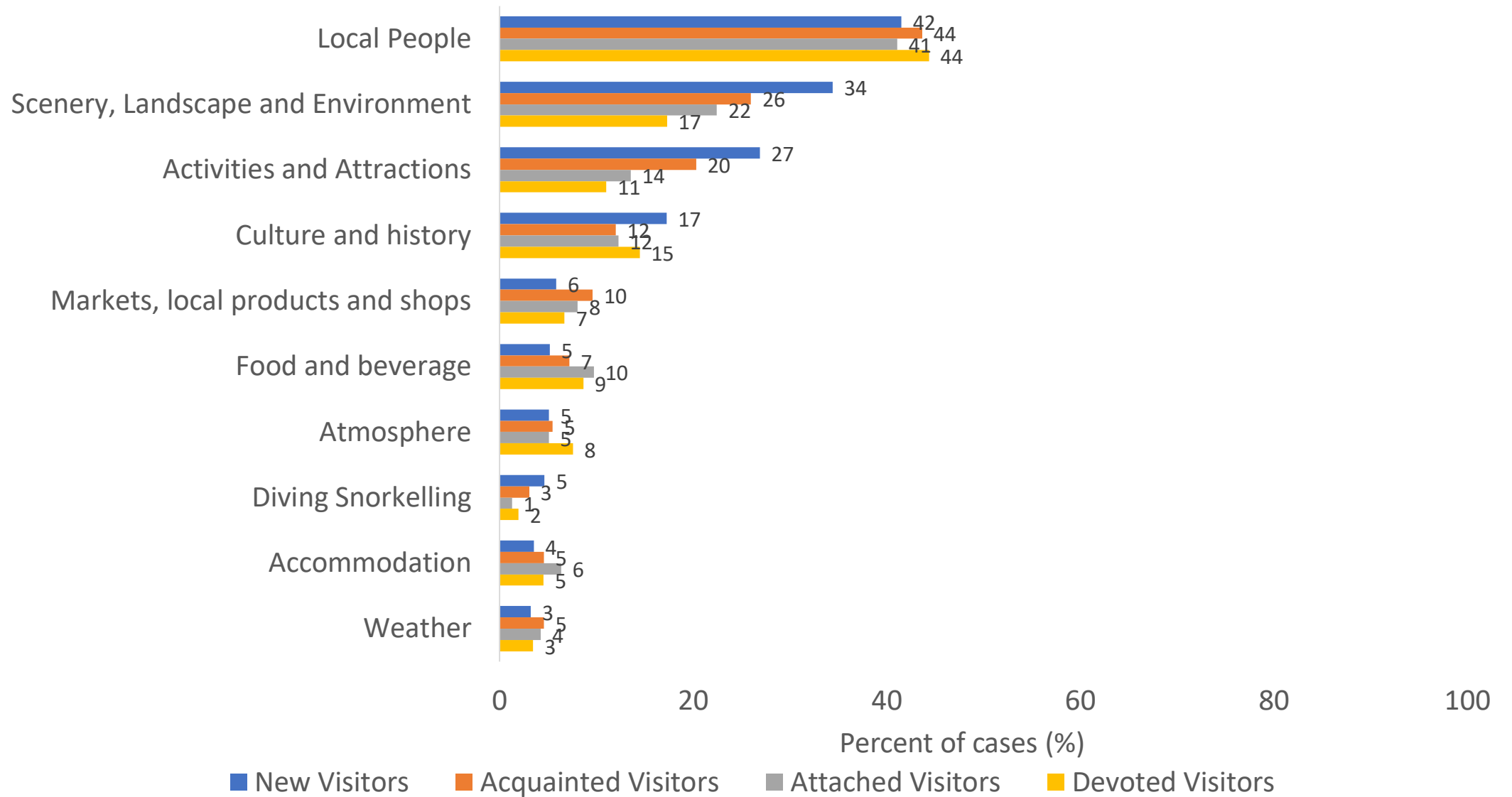
# Repeat visitors are more willing to return to Solomon Islands



# There is limited variation in willingness to recommend Solomon Islands among the four segments

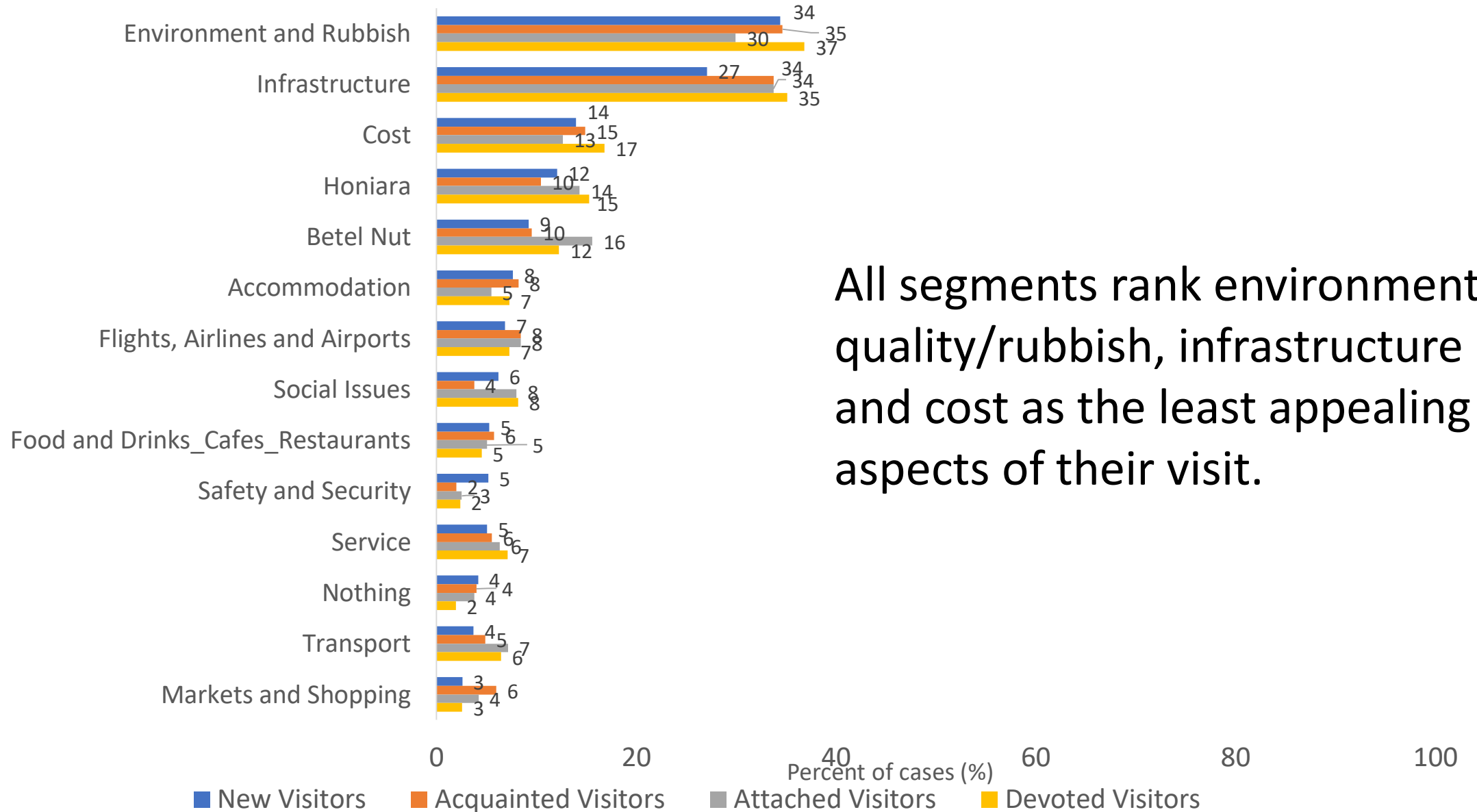


# All segments rate local people as the most appealing aspect of their visit



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

# Least appealing aspects of the visit



All segments rank environmental quality/rubbish, infrastructure and cost as the least appealing aspects of their visit.

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

# Key takeaway messages

- **Convert New Visitors into Acquainted Visitors** – overall they are a high yield segment in terms of **both** prepaid spend and in-country expenditure. This group is also more likely to travel to the provinces and to engage in a broader variety of activities and experiences.
- **Encourage first-time ‘holiday’ and ‘other’ categories to become repeat visitors.** Currently, repeat visitors are more likely to be ‘VFR’ or ‘business’ travellers.
- **Action:** find ways to follow up with New Visitors and share information (upcoming events, packages, new products and experiences, etc.) to entice a return visit.



# Key takeaway messages

- **Business travellers are a significant part of repeat visitation** – they are a high yield segment but may be vulnerable to predicted reductions in corporate travel. The role of this segment may decrease but there could also be initial increase due to pent up demand.
- **Value VFR travellers.** An important part of repeat visitor groupings and highly likely to lead the return of overseas visitors. This group will likely make up a larger portion of travellers than pre-COVID.
- **The repeat holiday visitor grouping is relatively small but well worth developing.** Acquainted, attached and devoted holiday makers will likely make up a bigger portion of overall arrivals in the future.
- **Action:** Look for opportunities to increase per person yield from each of these groups. There are new opportunities to develop and experiences to share. Develop deeper insight into groups such as attached/devoted holiday makers and VFR.



# Thank you

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