

# Vanuatu International Visitor Survey

Jan – Jun 2019



# Summary of the Key Findings

## Total Direct Economic Impact for Jan-Jun 2019

US\$75.7 Million (Vt 8.6 billion) directly flowing to Vanuatu Economy  
US\$ 1,489 (Vt 169,628) per visitor per Trip; 50,820 visitors in all  
US\$186 (Vt 21,189) per visitor per day

### Respondent Profile and Characteristics

- 73% from Aus/NZ
- 74% under 59 years
- 56% female
- 71% household income less than \$100,000

### Decision Making

- Friends and family , previous visits, and Google are key sources for finding Vanuatu as a destination
- 34% purchased by direct with airlines and/or an accommodation places

### Satisfaction

- 80% would come back
- Satisfied with local people, environment, activities and attractions
- Public service and facilities, rubbish, prices of goods and airport and flight related issues least appealing

# Summary of the Key Findings: Visitor Spend

**USD 75.7 M**

**Vt 8.6 Billion**

**50,820**

**USD 1,489**  
**Vt 169,628**

PER VISITOR  
PER TRIP

▼ 4.2% decrease  
from 2018

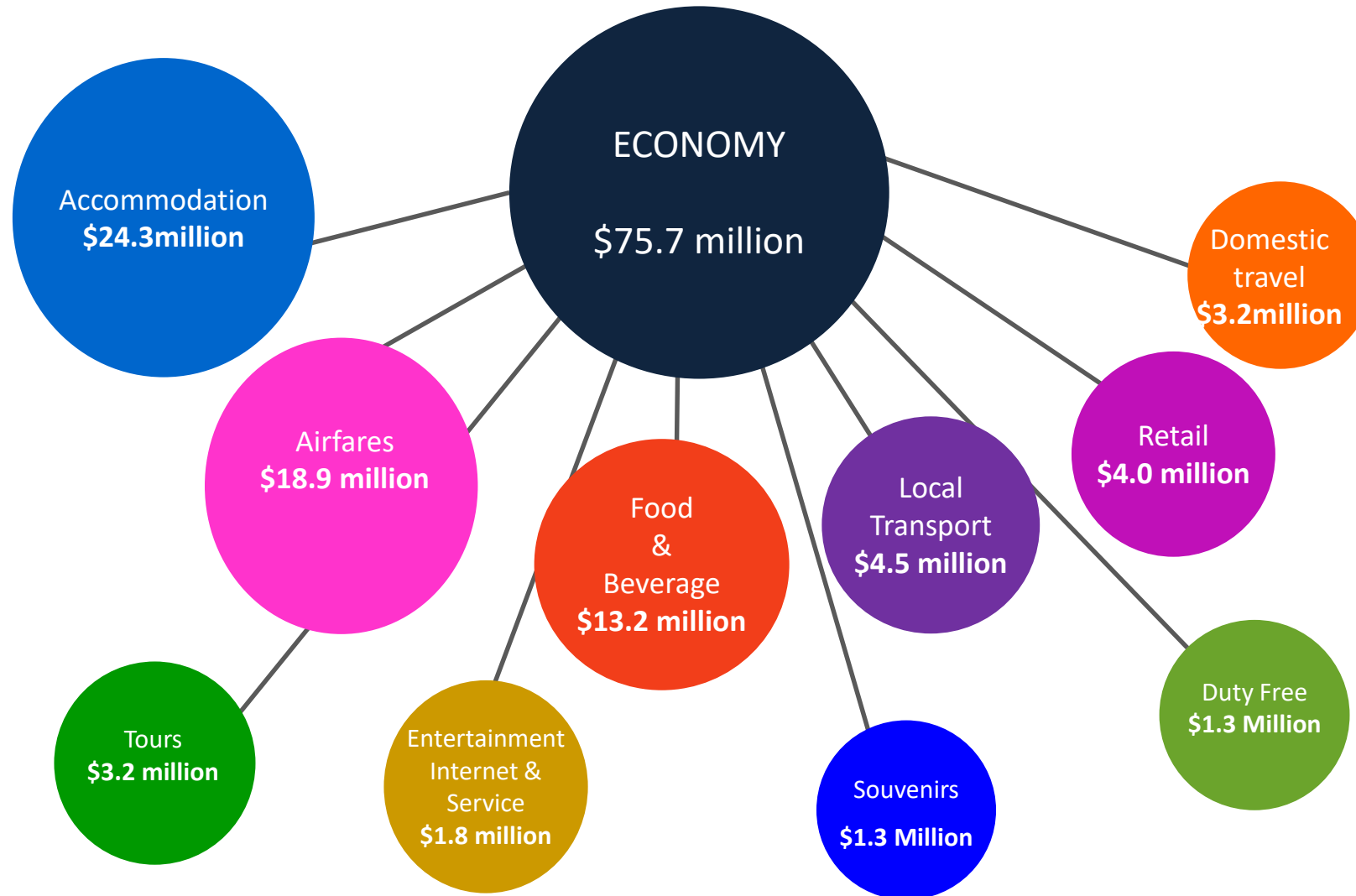
**USD 186**  
**Vt 21,189**

PER VISITOR  
PER DAY

▼ 3.1% decrease  
from 2018

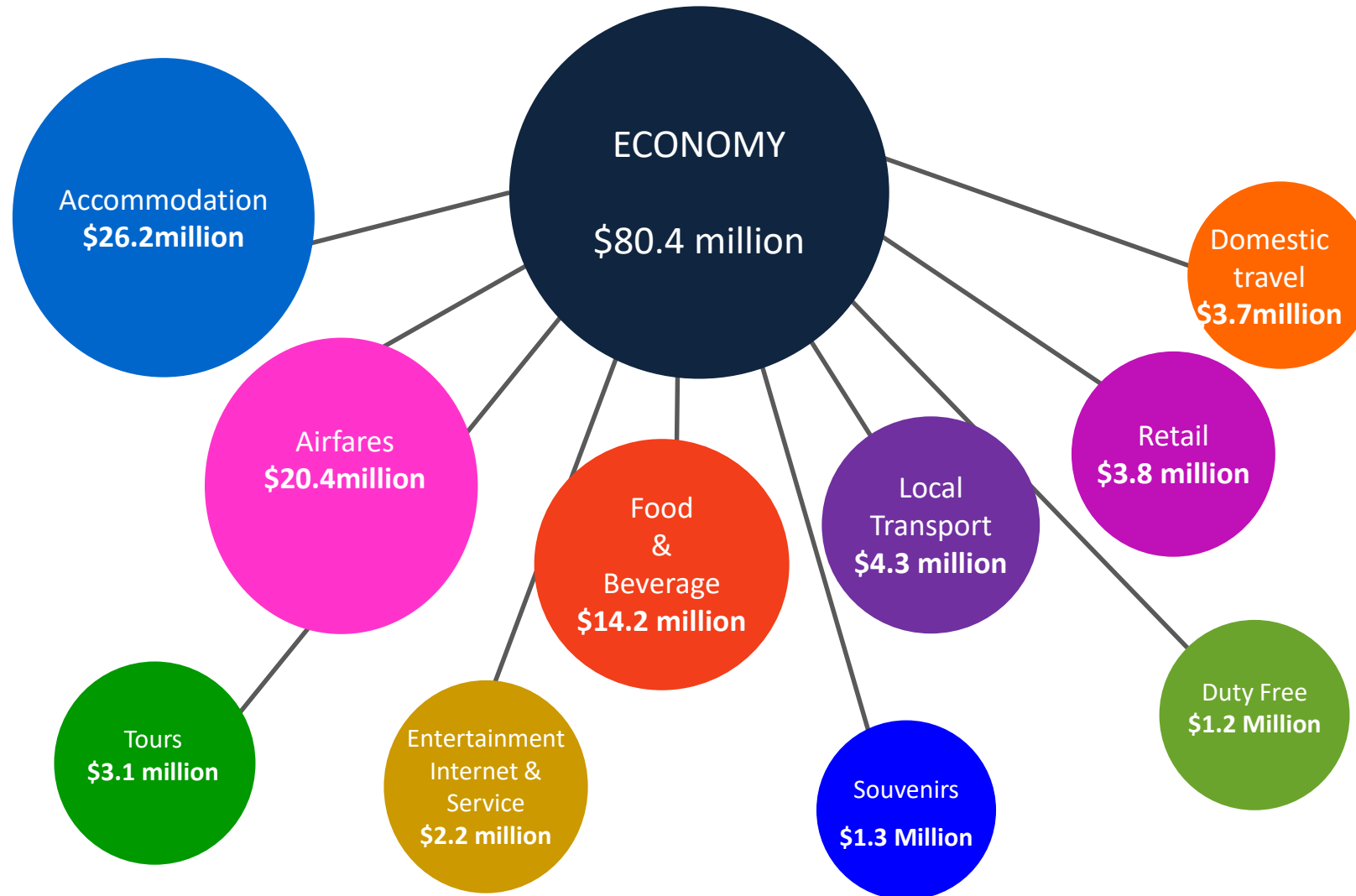
# Direct Economic Impact for Jan – Jun 2019

## Pre-Arrival and in Country Spend



# Direct Economic Impact for Jan – Jun 2018

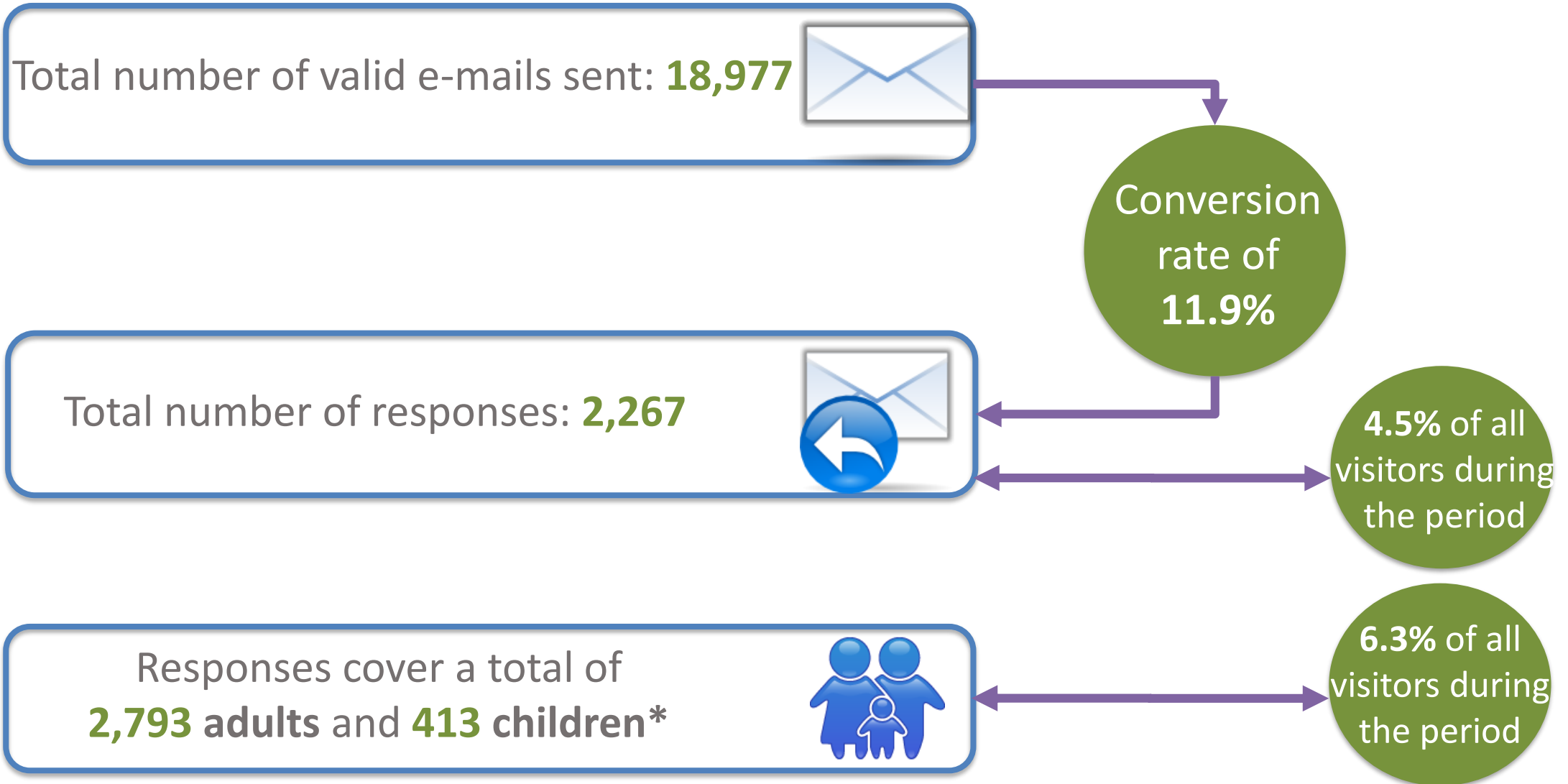
## Pre-Arrival and in Country Spend



# Presentation Structure

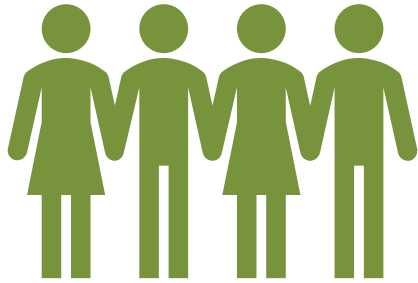


# Respondents (Jan – Jun 2019)



*\*Note: The numbers are non-weighted.*

# IVS Respondents (Jan 2015 – Jun 2019)



Respondents  
to Date  
**22,322**



Total people  
included in  
expenditure sections  
**41,140**



# Visitor Characteristics - IVS Respondent Data



## Household Income

39% Under \$50,000  
32% \$50,000 - \$100,000  
29% Over \$100,001



## People Covered

2,740 Adults  
409 Children\*



## Age

20% 30-39 years old  
18% 40-49 years old  
20% 50-59 years old



## Country of Origin

53% Australia  
19% New Zealand  
15% New Caledonia  
7% Other Pacific  
6% Long Haul

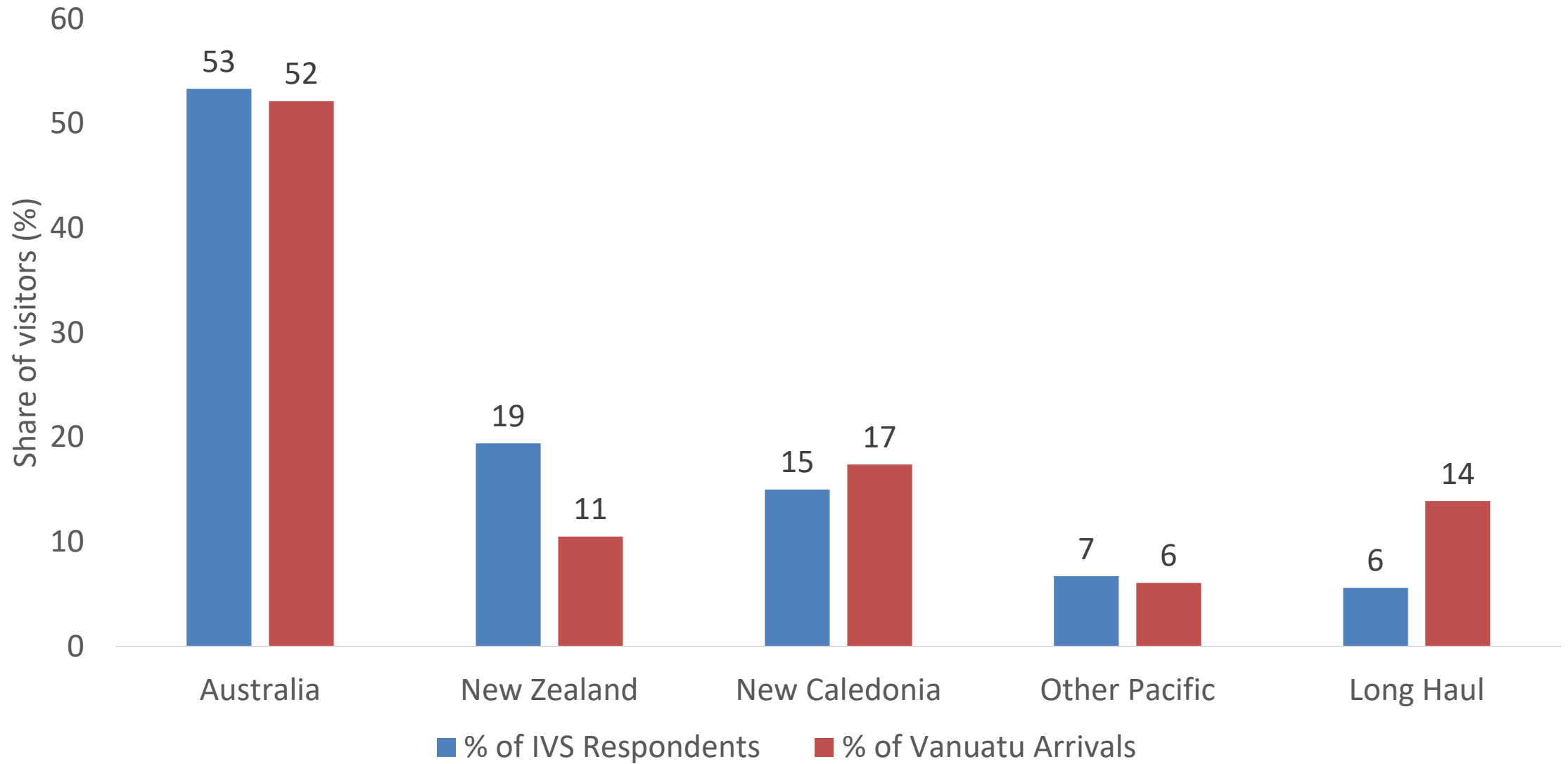
## Gender



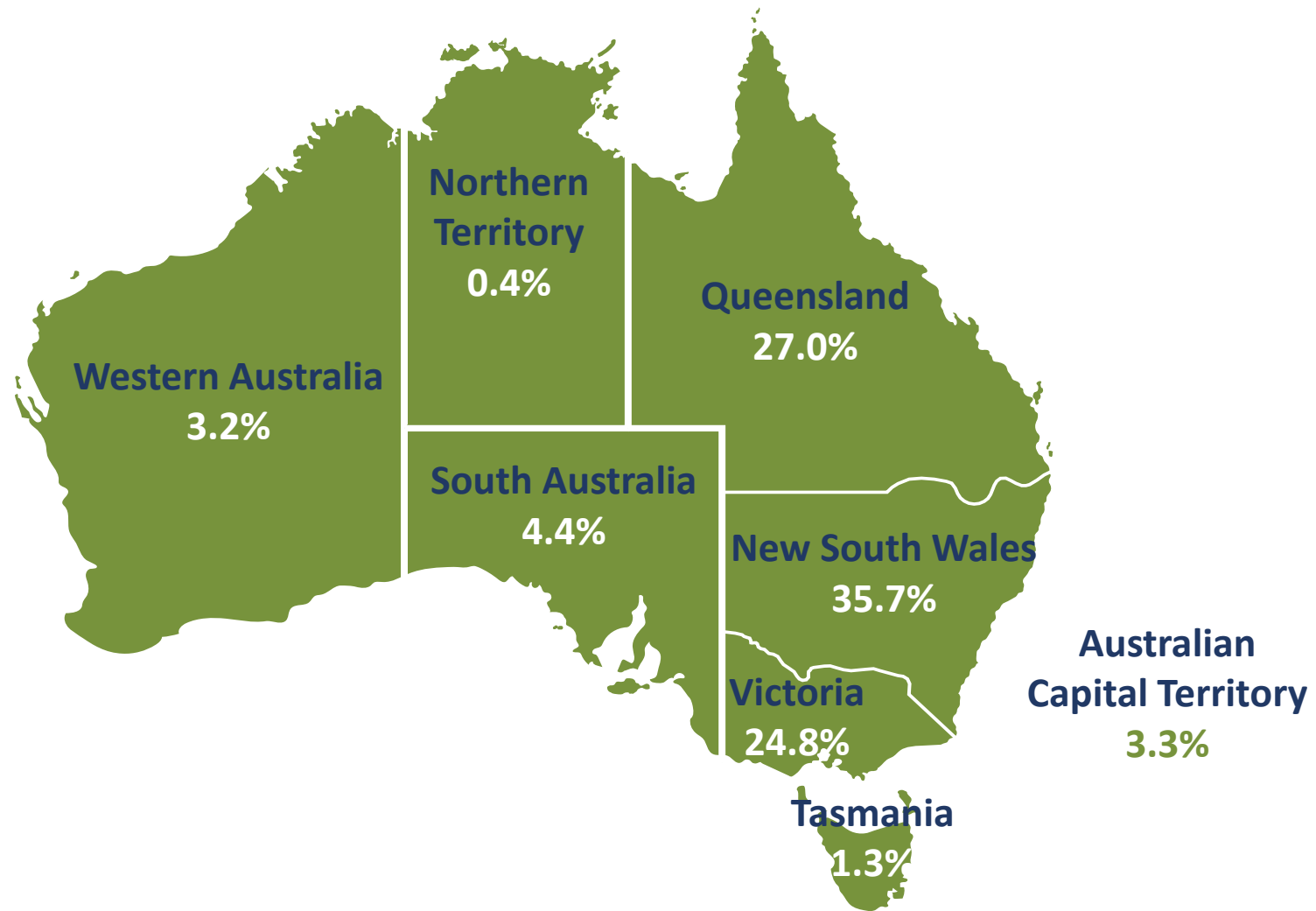
Females

*\*Note: The numbers are non-weighted.*

# Country of Origin

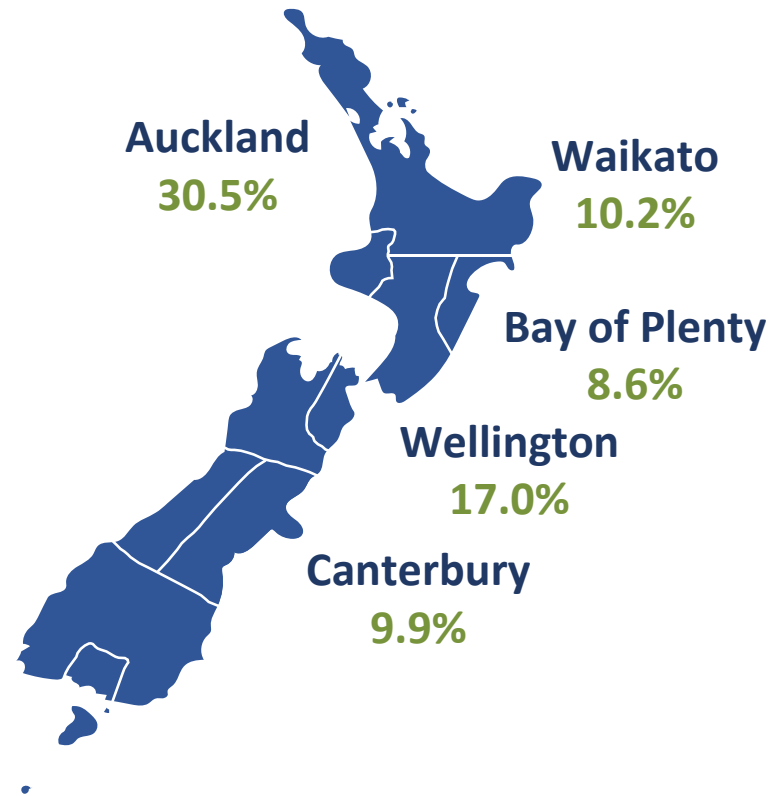


# Australian Respondents - IVS Respondent Data



New South Wales, Queensland and Victoria make up **87.5%** of all Australian visitor arrivals

# New Zealand Respondents - IVS Respondent Data

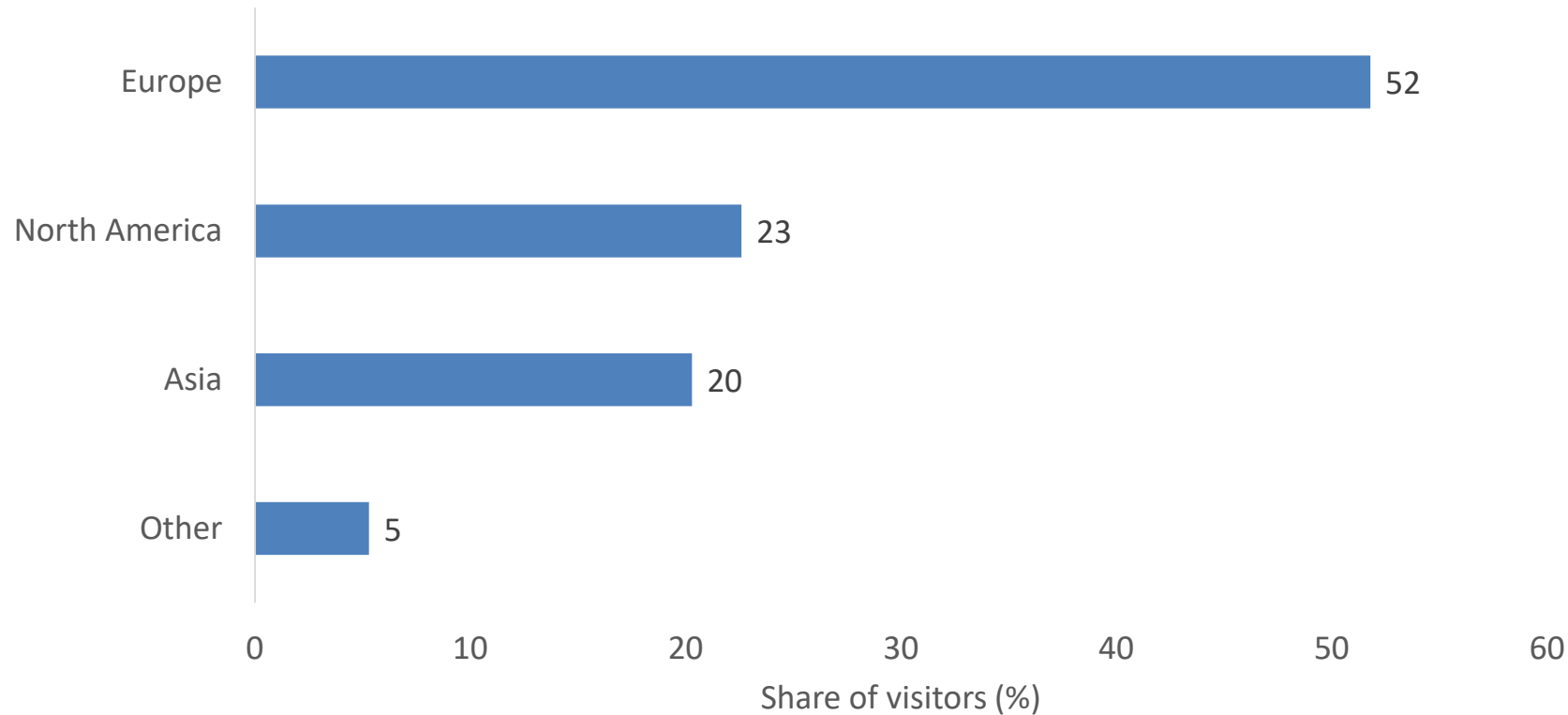


Auckland, Waikato, Canterbury, Wellington, and Bay of Plenty make up **76.2%** of all New Zealand visitor arrivals

# Long Haul Market- Region Breakdown

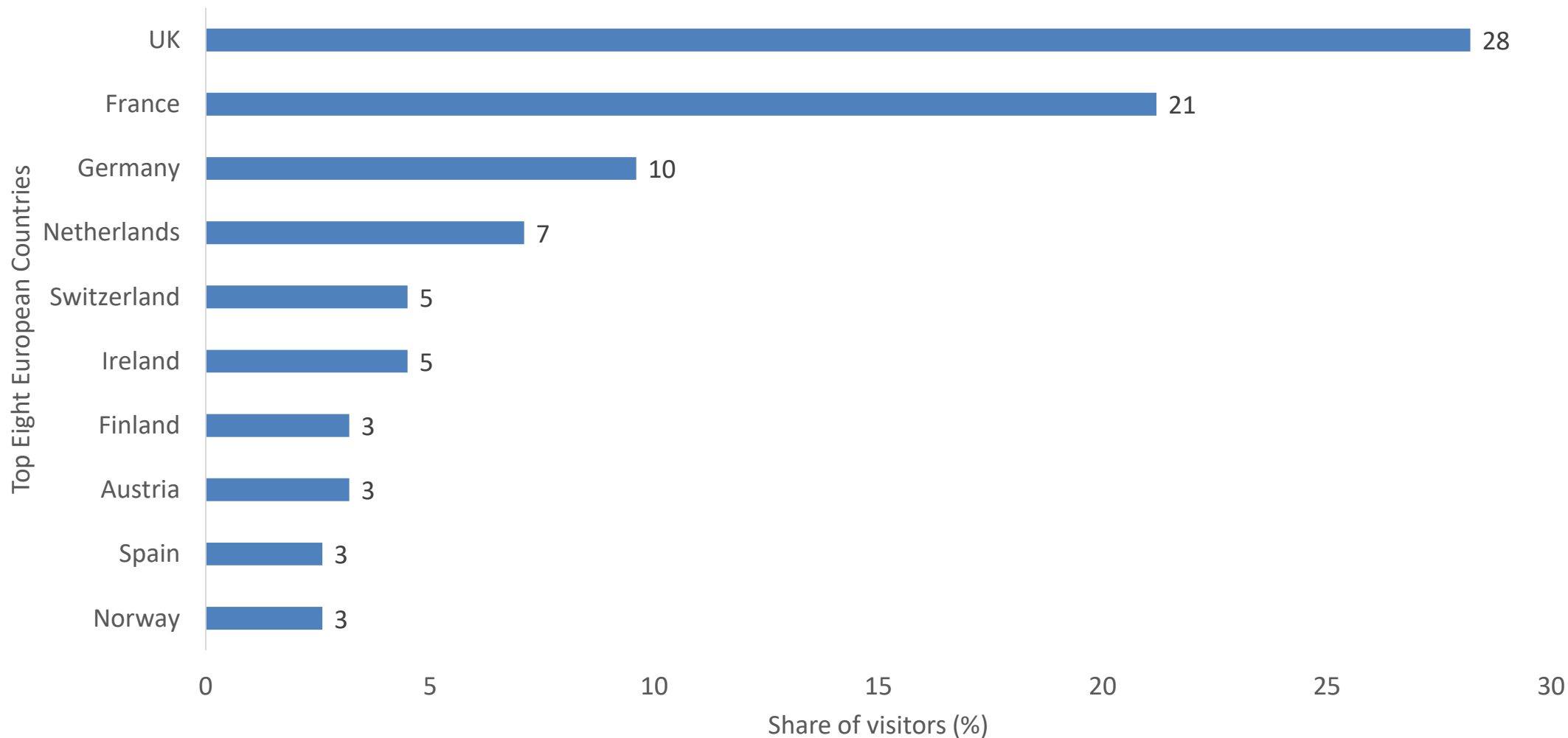
## Long Haul – Region Breakdown

13% of IVS respondents



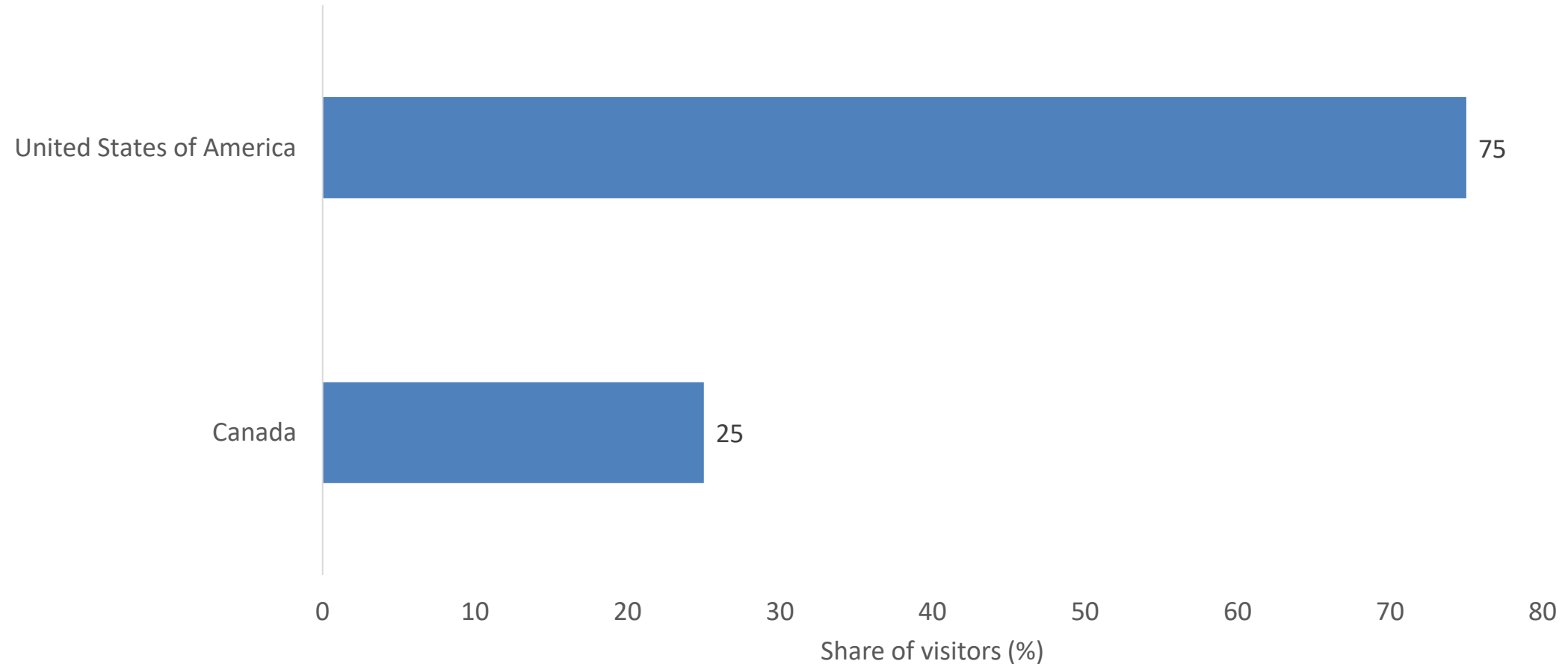
# Long Haul Market – Europe

## Europe (Top 10 countries)



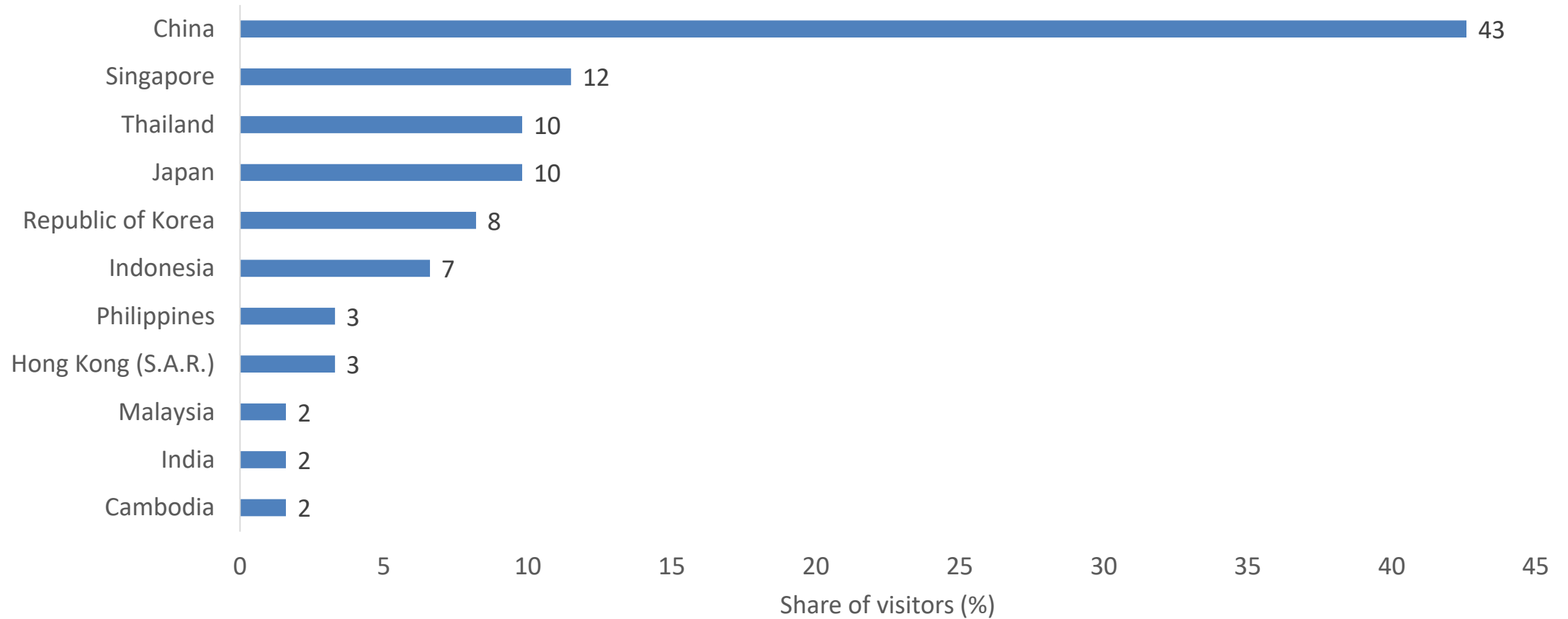
# Long Haul Market – North America

## North America



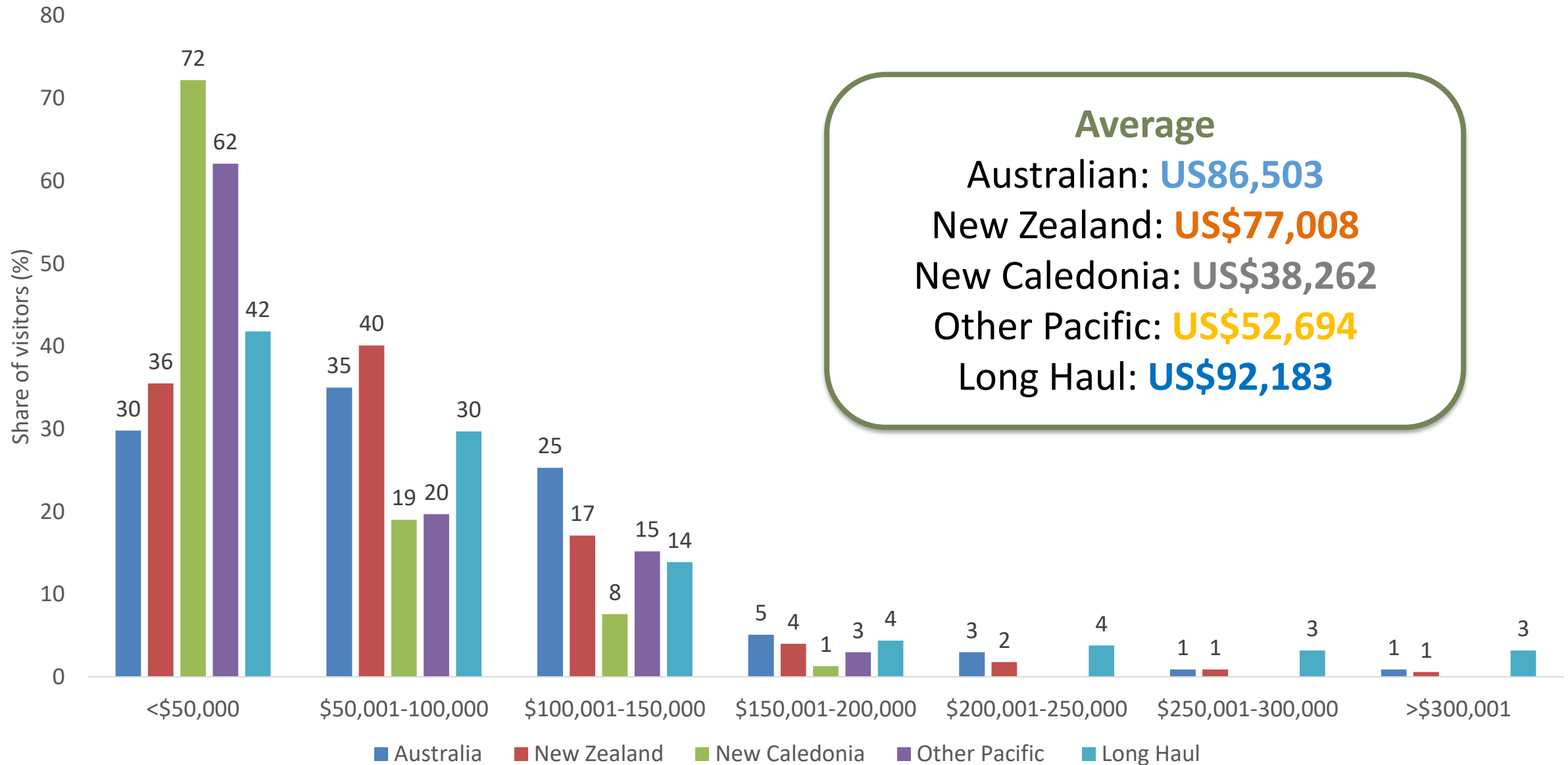
# Long Haul Market – Top Countries

## Asia





# Annual Household Income



# Presentation Structure



# Visitor Characteristics – Summary



## Airlines Used

**59%** Air Vanuatu  
**23%** Virgin Australia  
**10%** Aircalin  
**10%** Fiji Airlines  
**9%** Qantas (code share)



## Length of Stay

**8.0** Nights on average  
**62%** Stayed up to 1 week



## Previous Visits

**57%** First trip  
**22%** 1 or 2 times



## Travel Companions

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



## Purpose of Visit

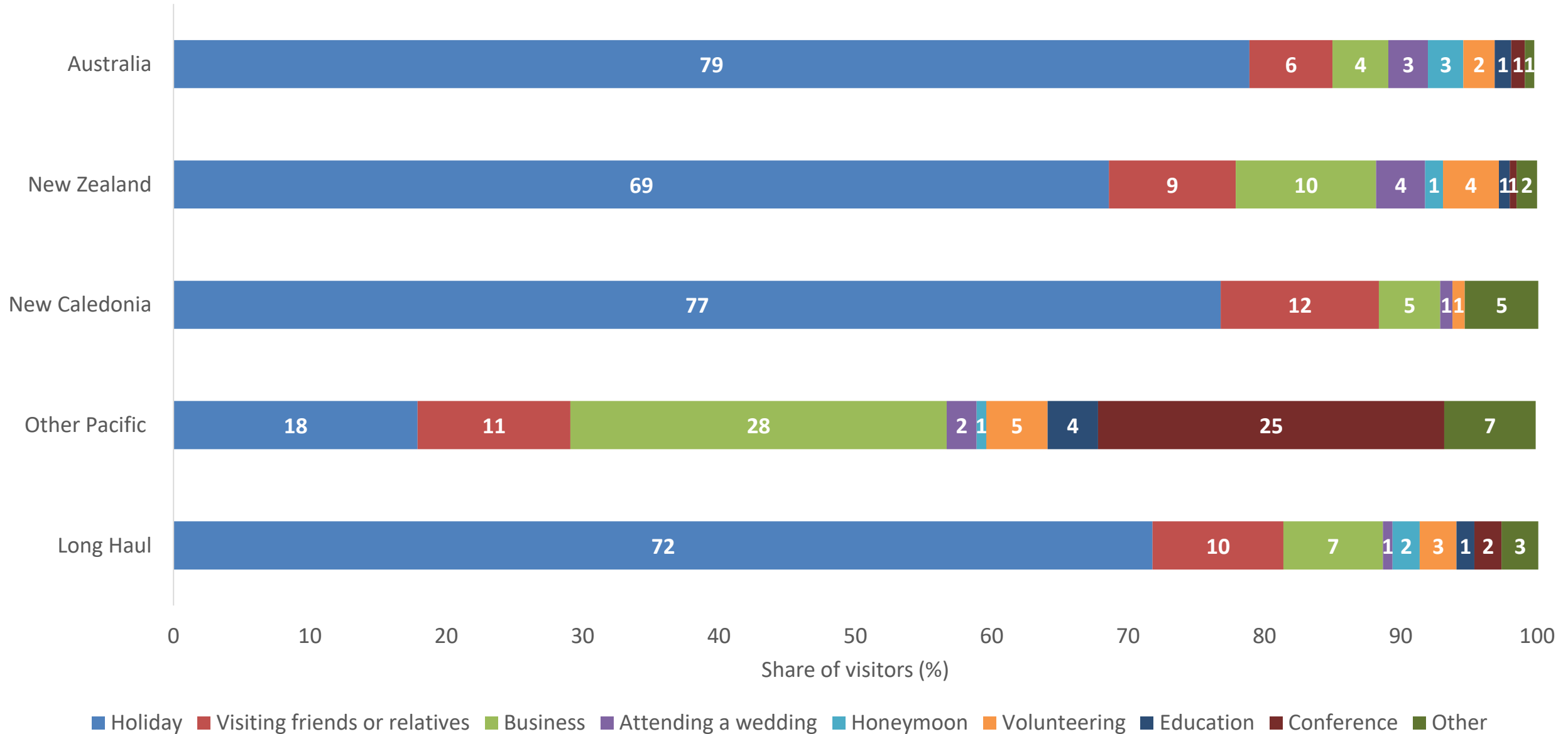
**73%** Holiday  
**8%** Visiting Friends/Family  
**7%** Business/Conference



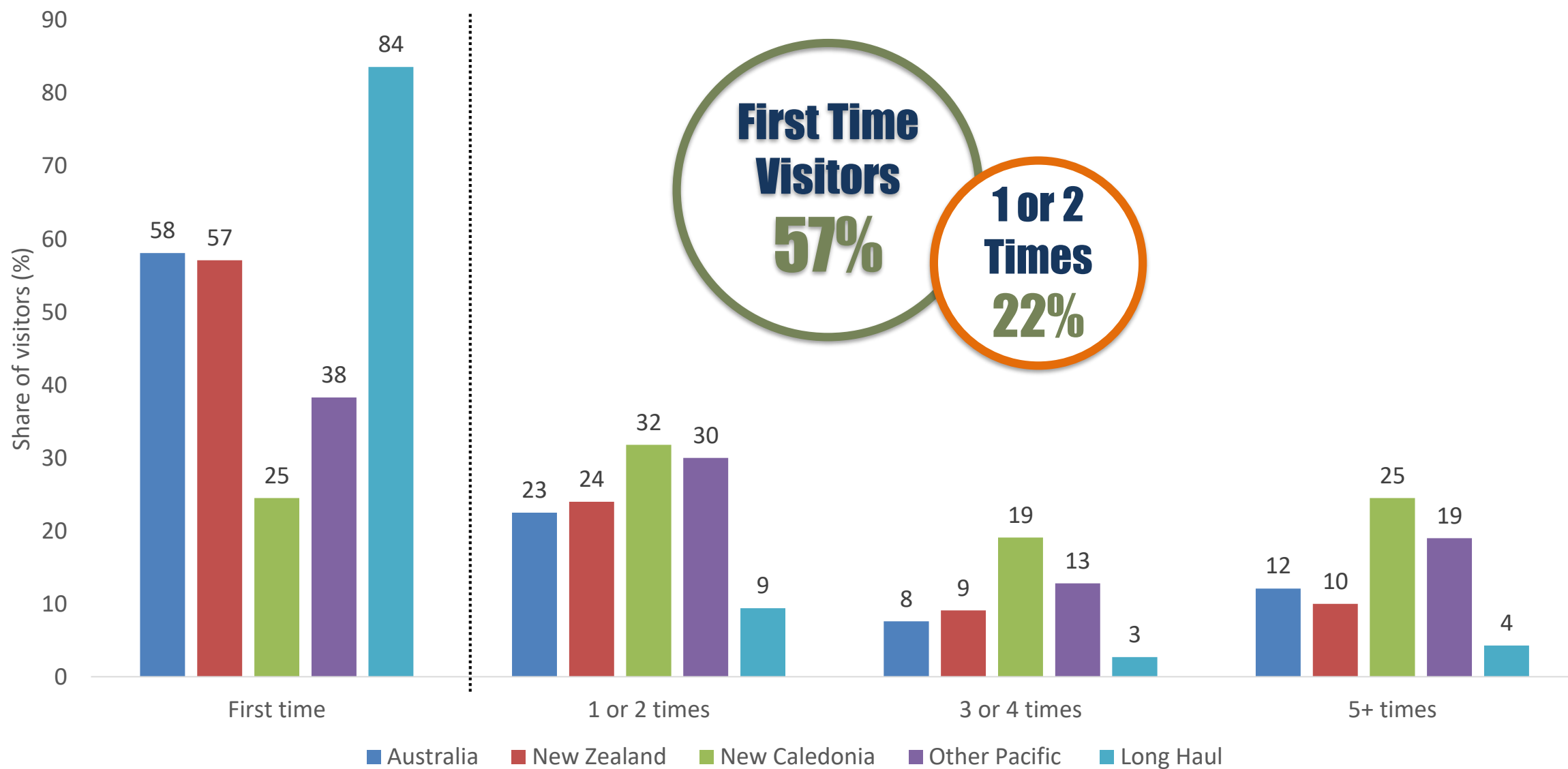
## Islands Visited on Trip

**96%** Efate (Port Vila)  
**18%** Tanna  
**16%** Espiritu Santo

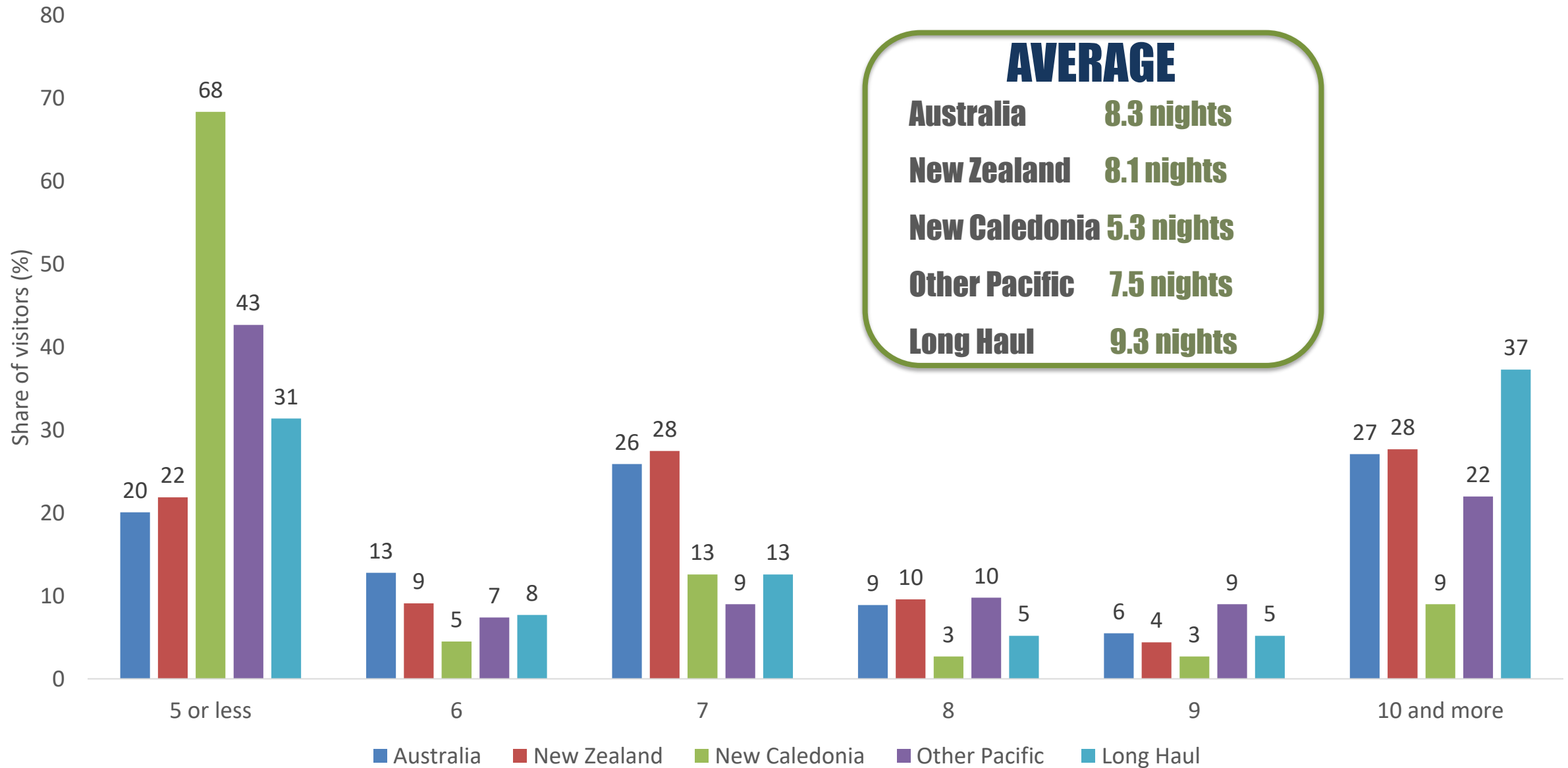
# Main Purpose of Visit



# Previous Visits



# Length of Stay (Nights)



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

# Airlines Used for Travel – Holiday



**Air Vanuatu**

**59%/62%**



**9%/9%**



**10%/6%**

**Others (Air New Zealand,  
Solomon Airlines)**

**5%/4%**



**23%/23%**



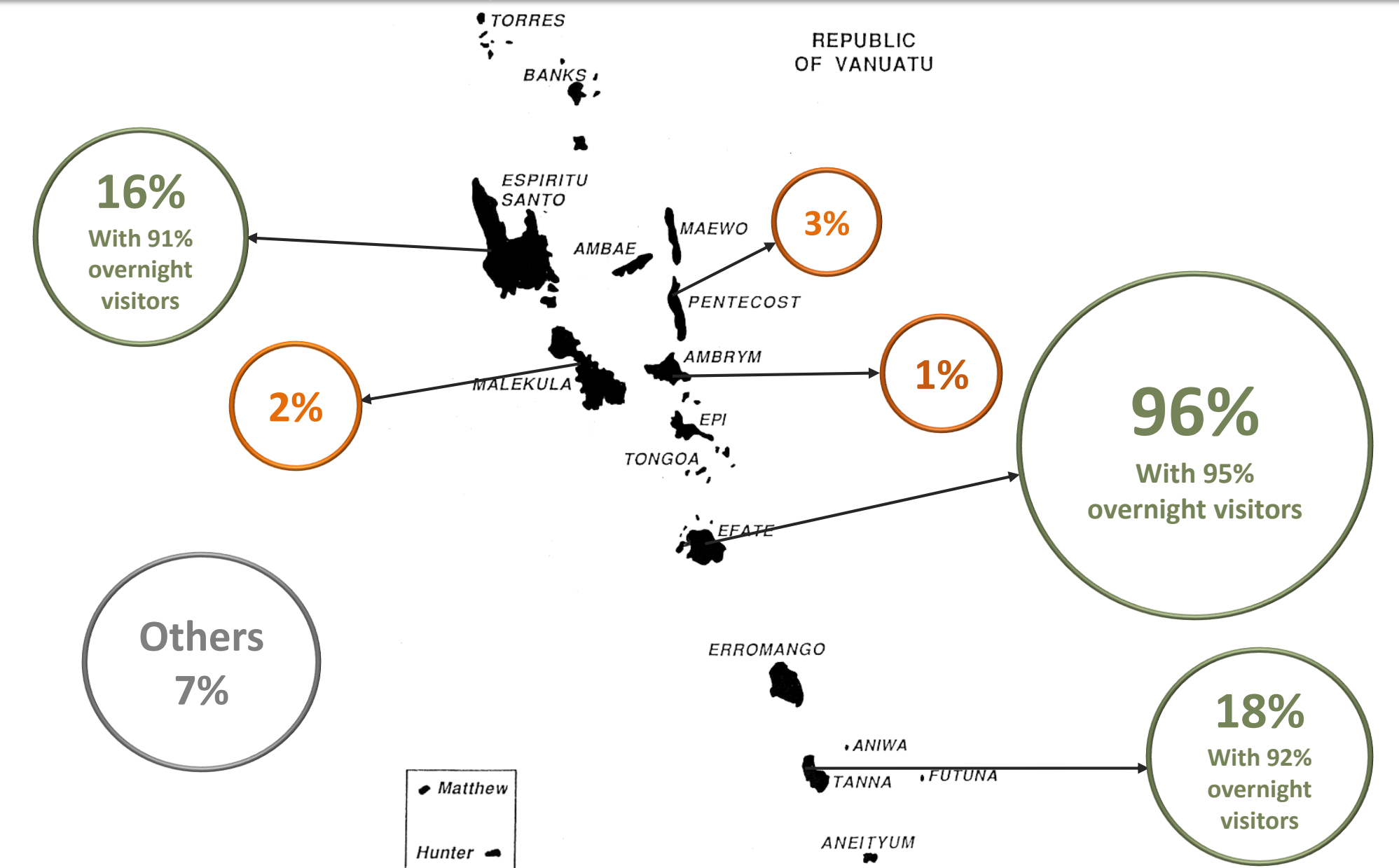
**10%/10%**



Fiji Airways and  
Aircalin are more  
commonly used  
by visitors from  
Pacific countries

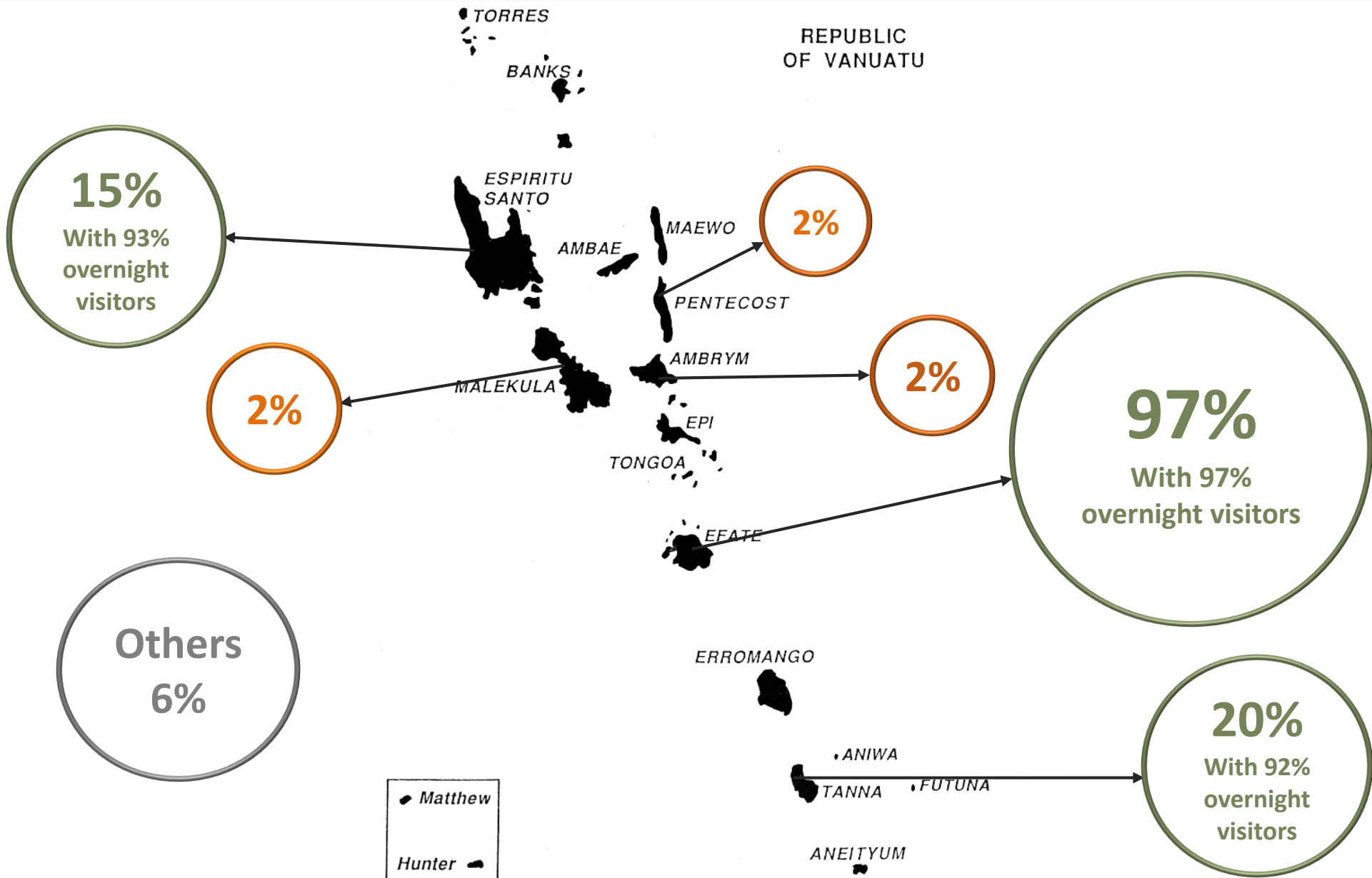
\* Text is grey represents all visitors/green represents 'holiday' only

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

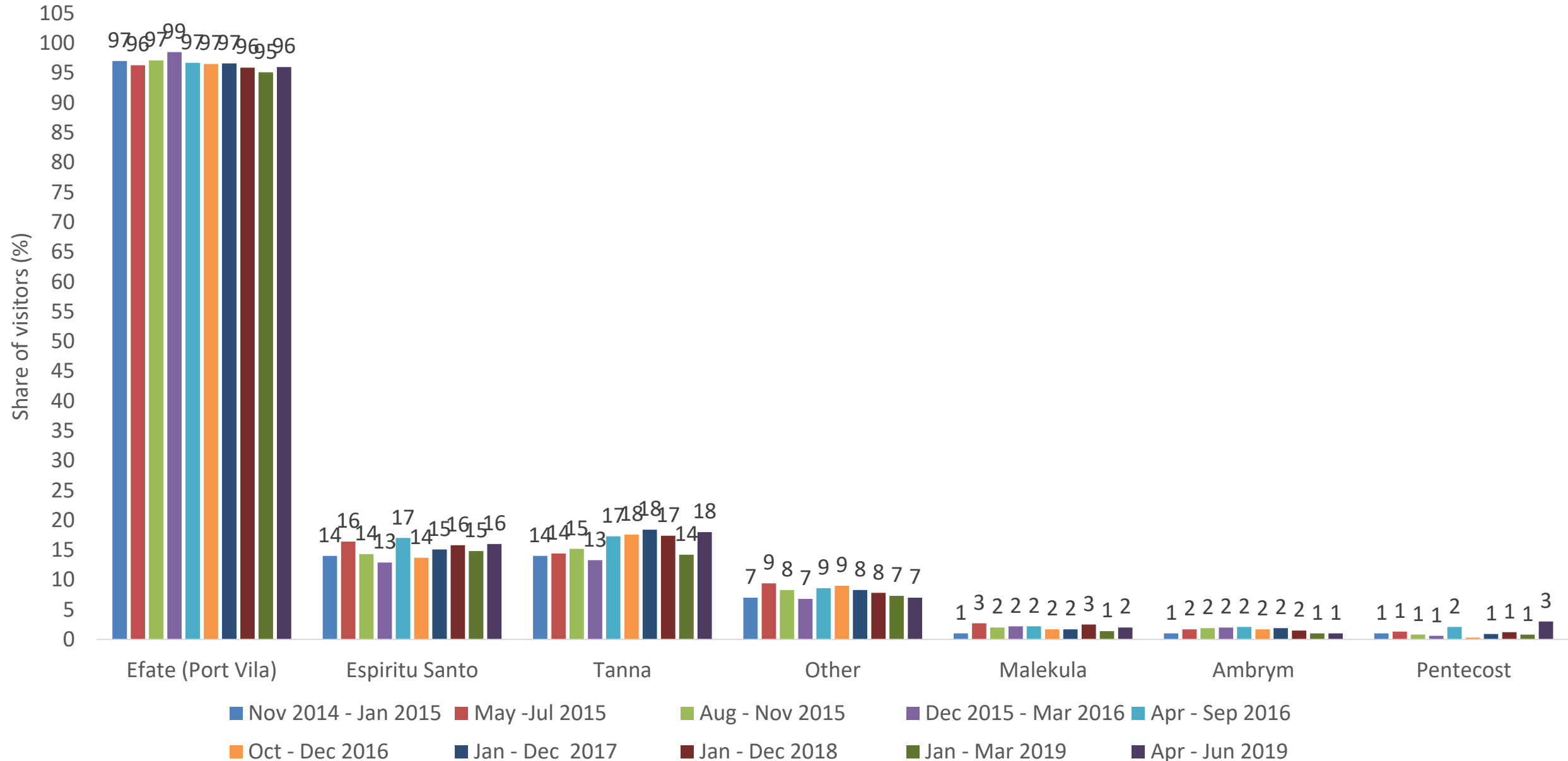




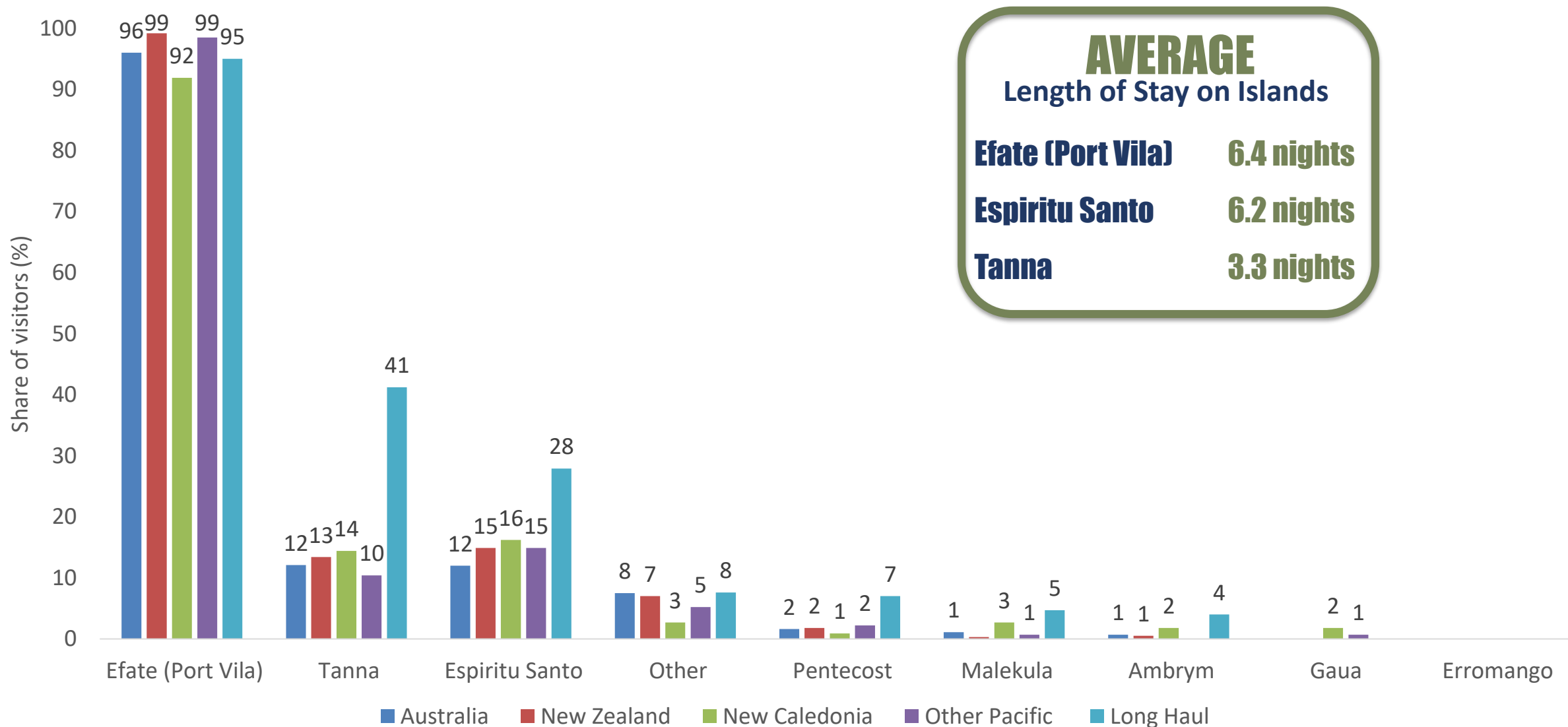
# Islands Visited - Holiday



# Outer Islands Visited – Time Series



# Outer Islands Visited – Country of Origin



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

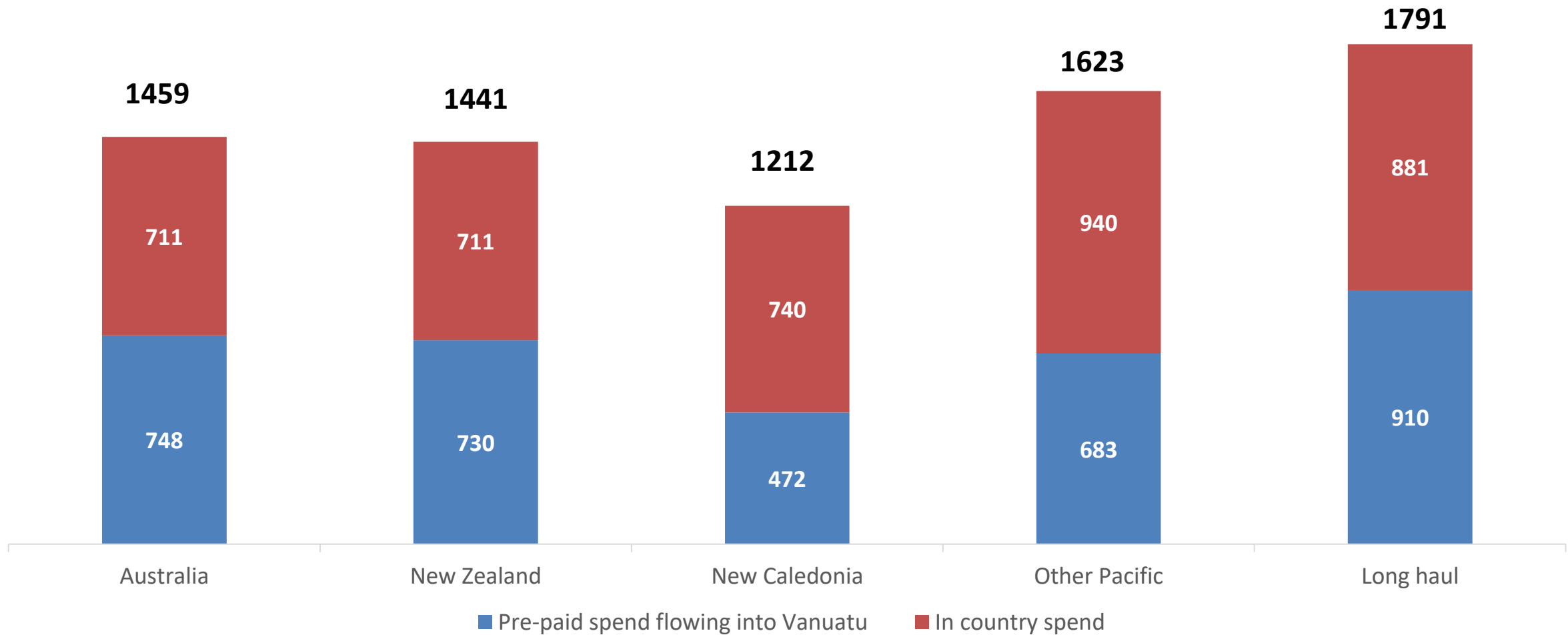
Note: 31+ days as outliers were removed for length of stay analysis

# Presentation Structure



# Expenditure by Market

## PER PERSON PER VISIT

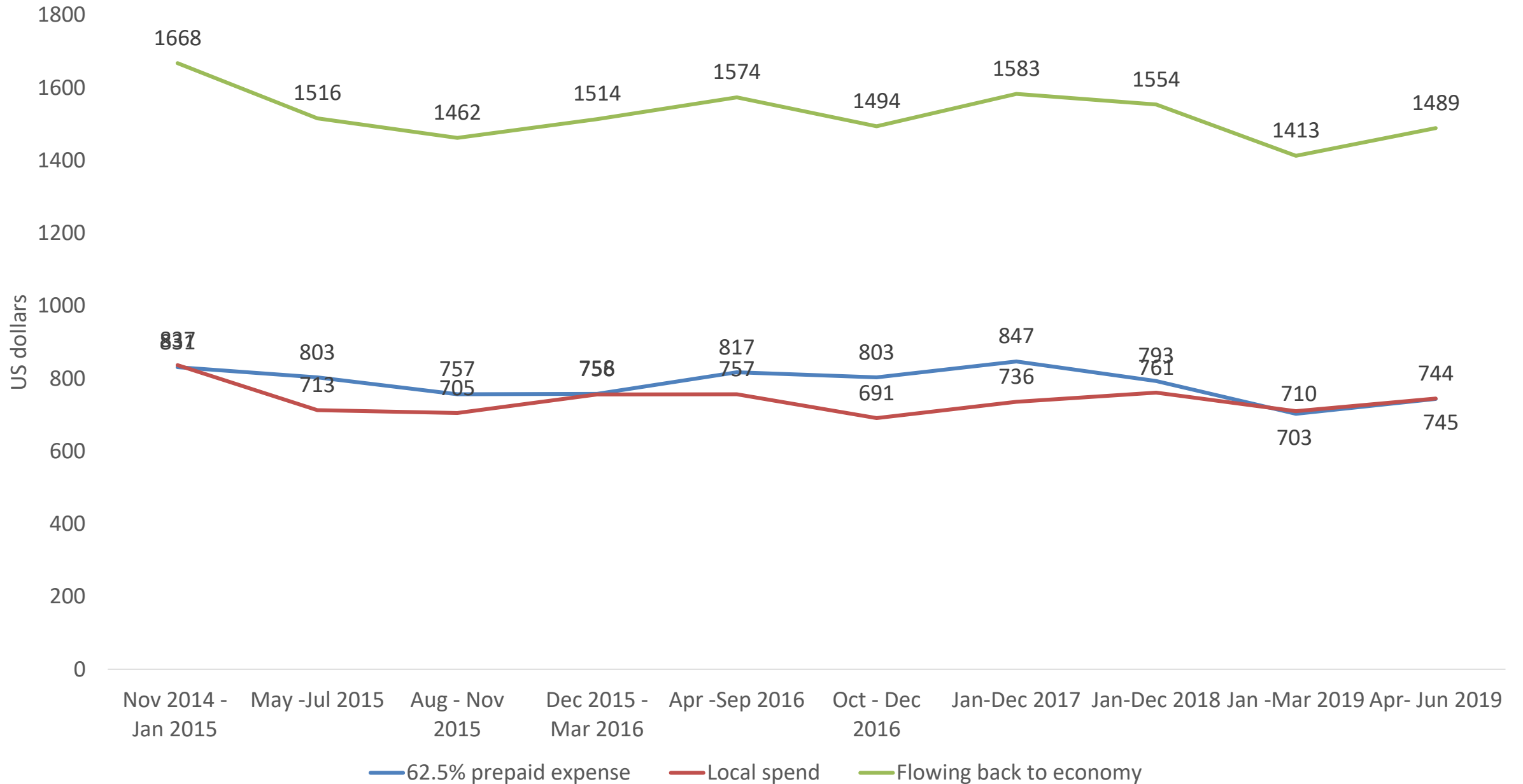


*Note: the high spend for long haul is driven by the higher length of stay.*

# 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	\$1,196	\$1,167	\$755	\$1,093	\$1,456	<b>\$1,190</b>
<b>Flowing into local economy</b> - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$748	\$730	\$472	\$683	\$910	<b>\$744</b>
Per Person per Day	\$90	\$90	\$89	\$91	\$97	<b>\$93</b>
Length of stay	8.3 nights	8.1 nights	5.3 nights	7.5 nights	9.3 nights	<b>8.0 nights</b>
<b>Average Spend while in Vanuatu</b>						
Per Person - Whole Trip	\$711	\$711	\$740	\$940	\$881	<b>\$745</b>
Per Person per Day	\$86	\$87	\$140	\$125	\$94	<b>\$93</b>
<b>Total spend flowing into Vanuatu economy – Whole Trip</b>	<b>\$1,458</b>	<b>\$1,441</b>	<b>\$1,212</b>	<b>\$1,623</b>	<b>\$1,792</b>	<b>\$1,489</b>
<b>Total spend flowing into Vanuatu economy – Per Day</b>	<b>\$176</b>	<b>\$177</b>	<b>\$230</b>	<b>\$216</b>	<b>\$192</b>	<b>\$186</b>

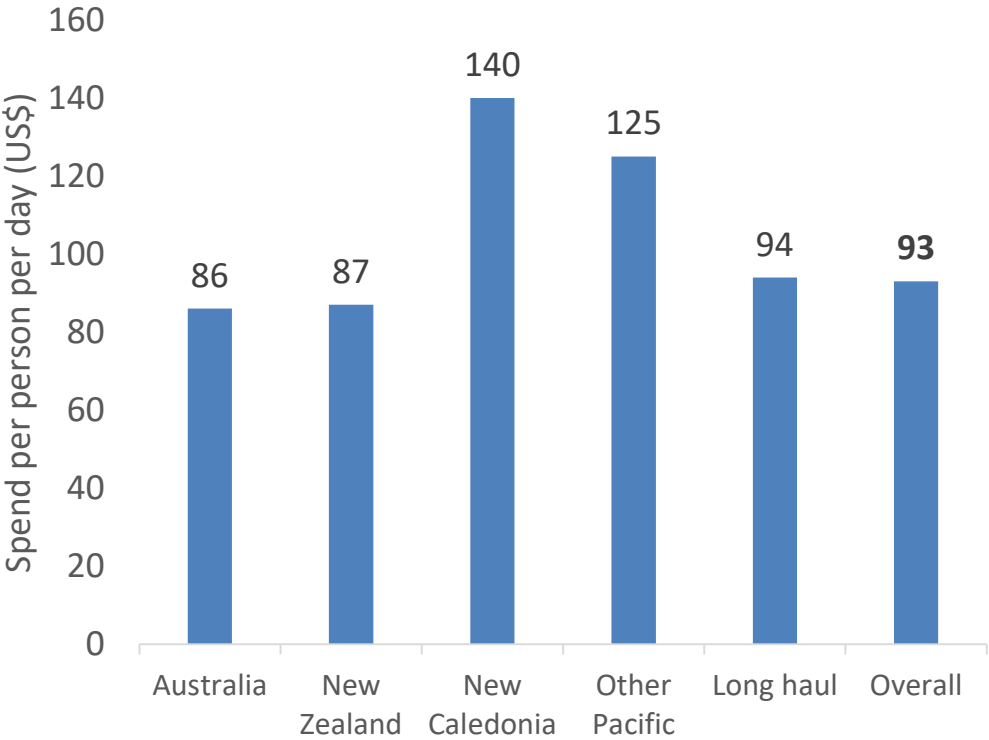
# Overall Visitor Spend Time Series Trends



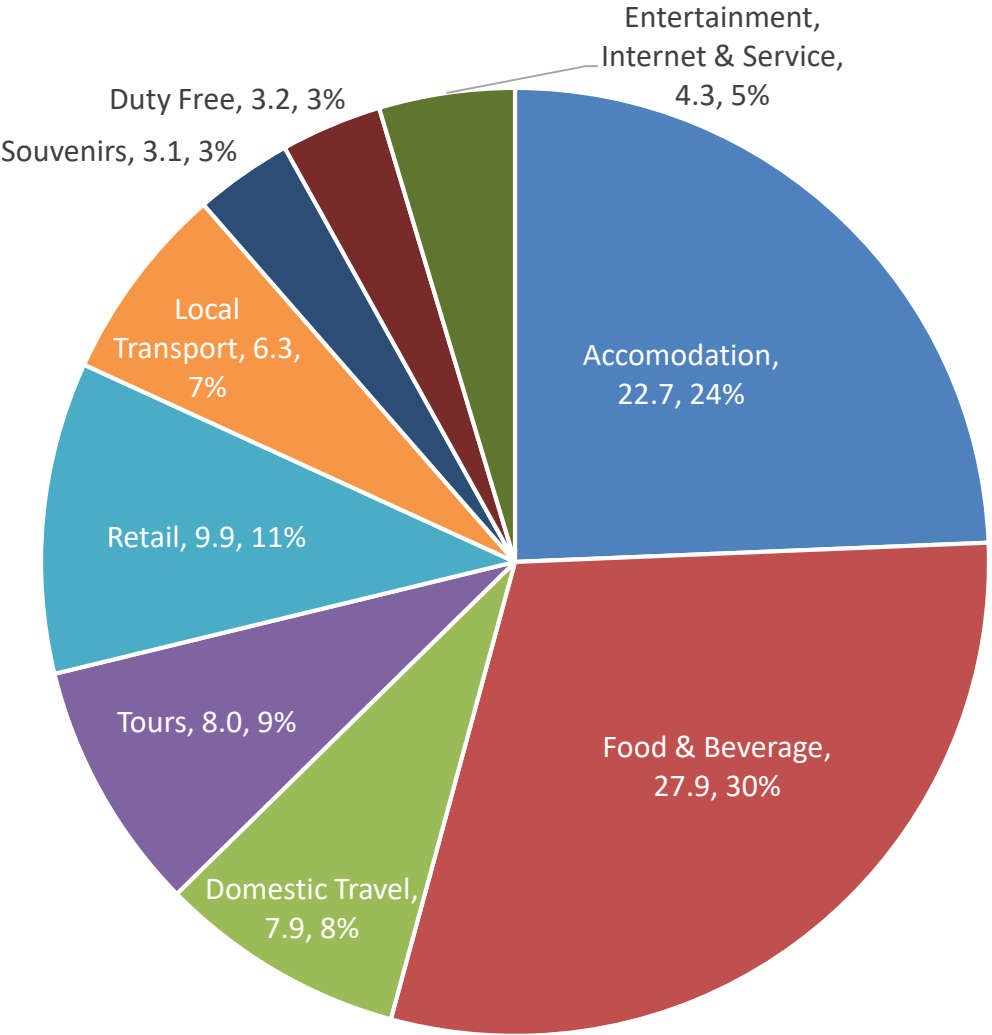
# Average Spend while in Vanuatu per day

## PER PERSON PER DAY

### By Market



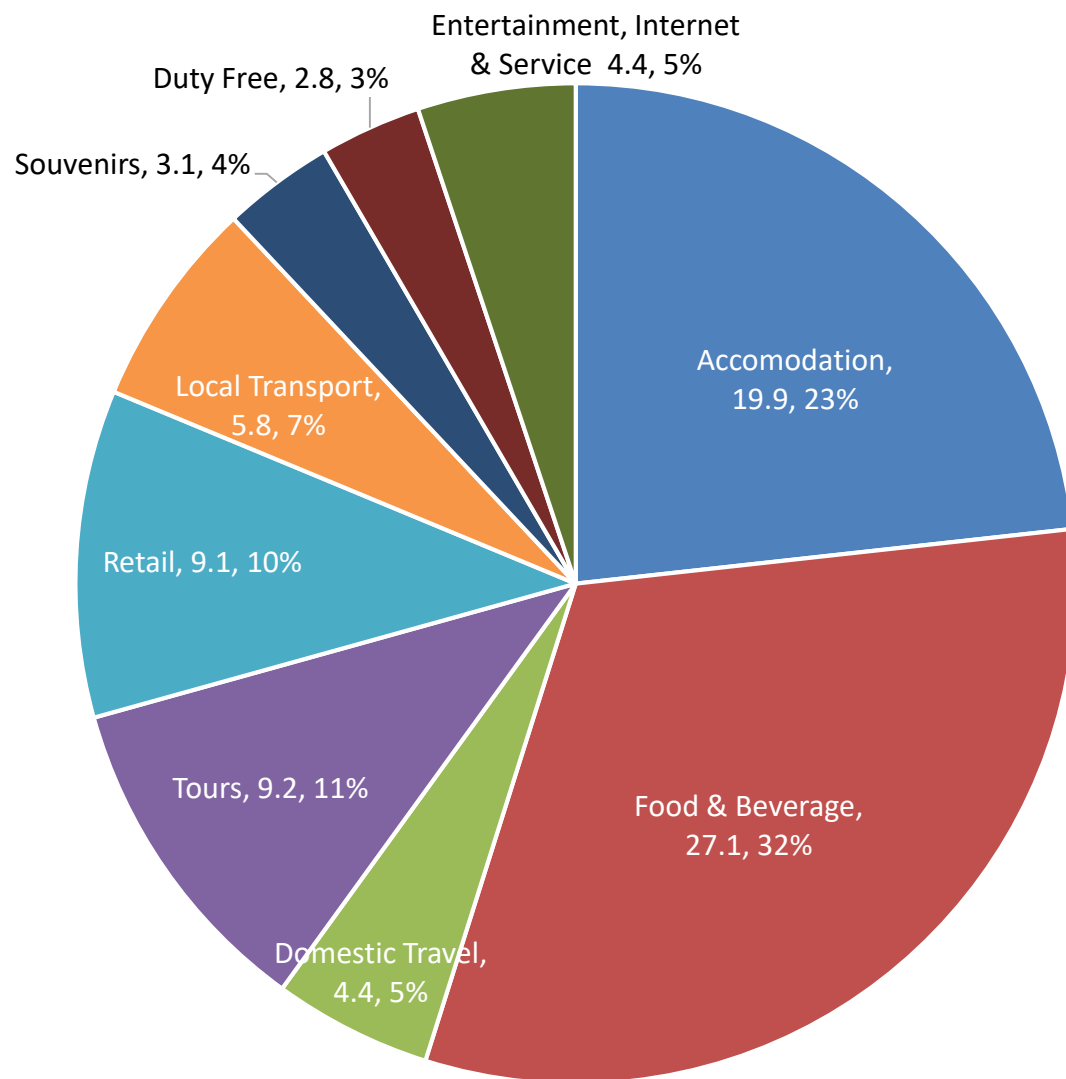
### Overall - \$93 per day



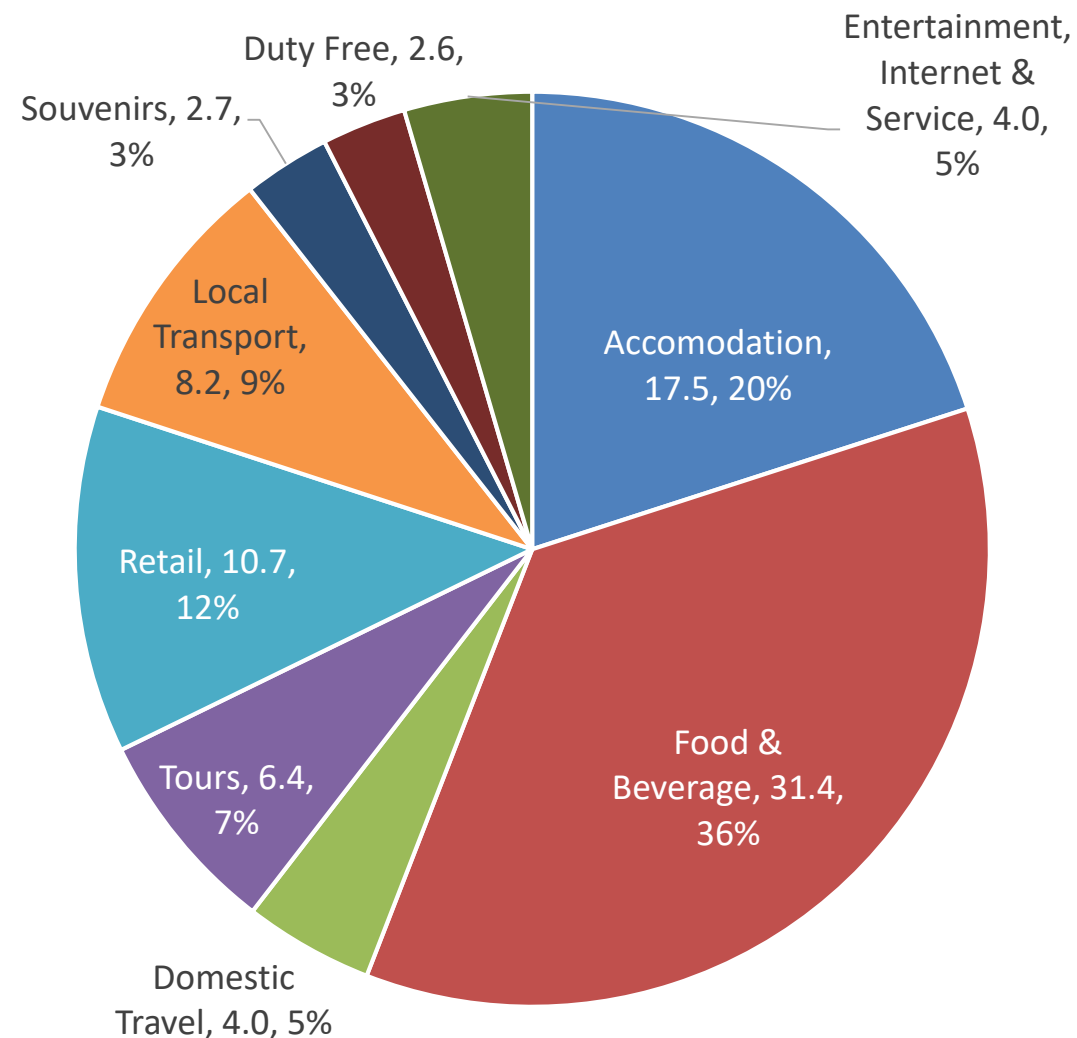


# Average Spend while in Vanuatu by Market

**Australia - \$86 per day**

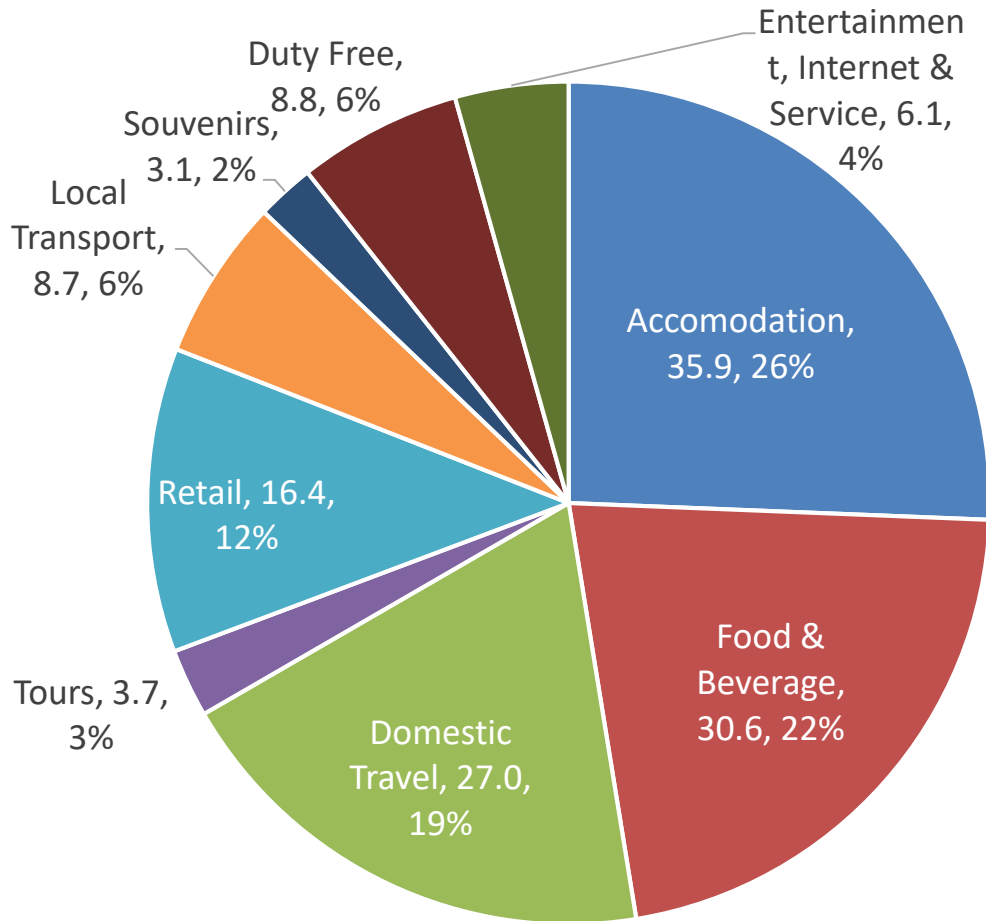


**New Zealand - \$87 per day**

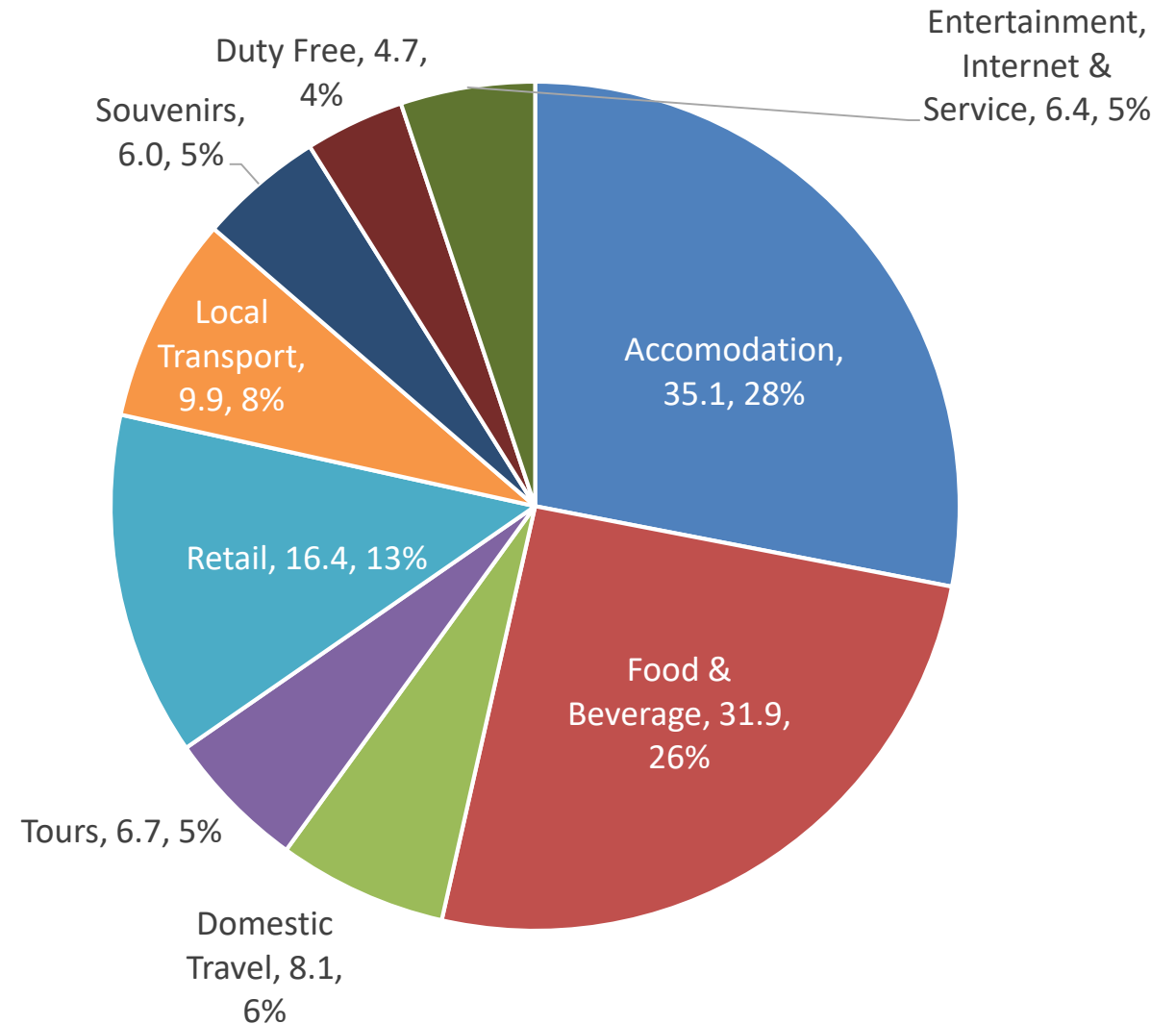


# Average Spend while in Vanuatu by Market

**New Caledonia - \$140 per day**

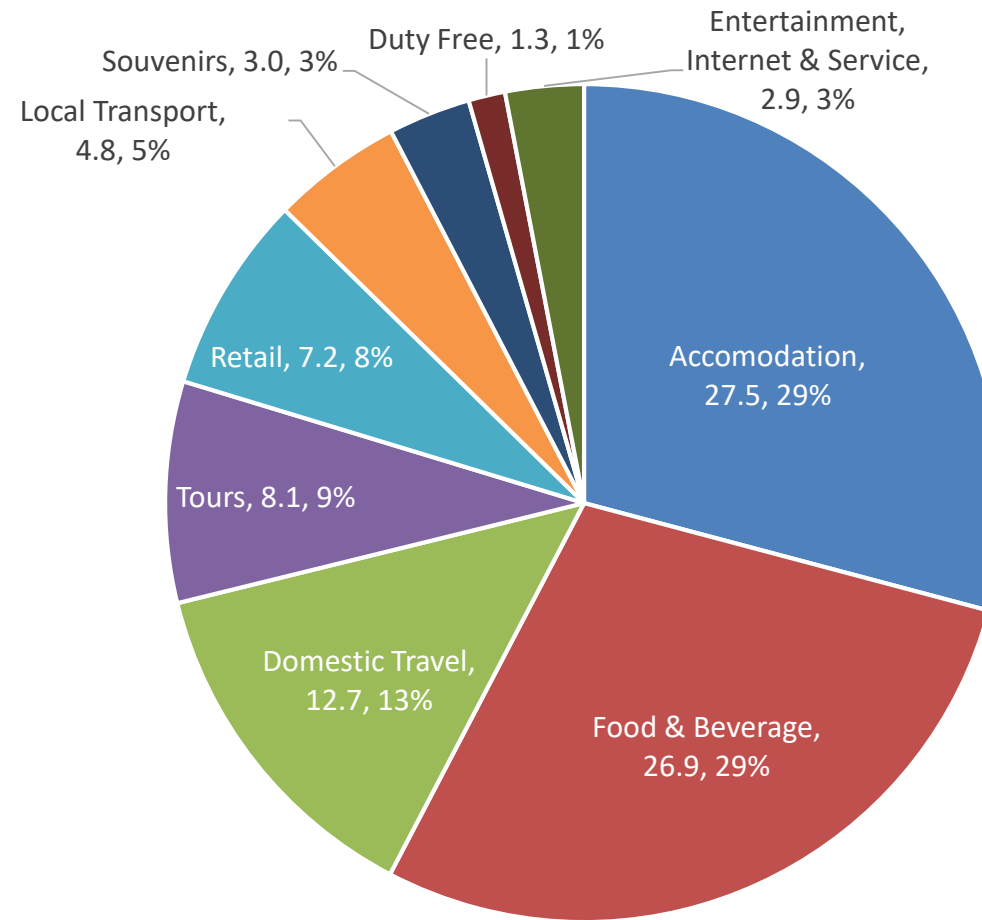


**Other Pacific - \$125 per day**



# Average Spend while in Vanuatu by Market

**Long Haul - \$94 per day**



# Visitor Expenditure – Per Person and Total

	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$93 Vt 10,595		US\$93 Vt 10,595		US\$186 Vt 21,190
Whole Trip	US\$744 Vt 84,757		US\$745 Vt 86,010		US\$1,489 Vt 170,767

## Direct economic impact on Vanuatu for Jan-Jun 2019

US\$75.7 million / Vt 8.6 billion in total

US\$12.6 million/ Vt 1.4 billion per month

# Presentation Structure



# Information Sources and Decision Making

## How did you find out about Vanuatu?



40% Friends and Family  
33% Previous Visits  
21% Google

## How did you purchase your travel?



34% Direct with airlines and/ or accommodation places  
30% Through a travel booking website  
23% Through a travel agent store  
12% Travel arrangements were made by others  
2% Other

## What influenced your decision making?



3.8/5 Experience a different culture



3.8/5 Quiet and relaxing atmosphere



3.6/5 Beaches and swimming



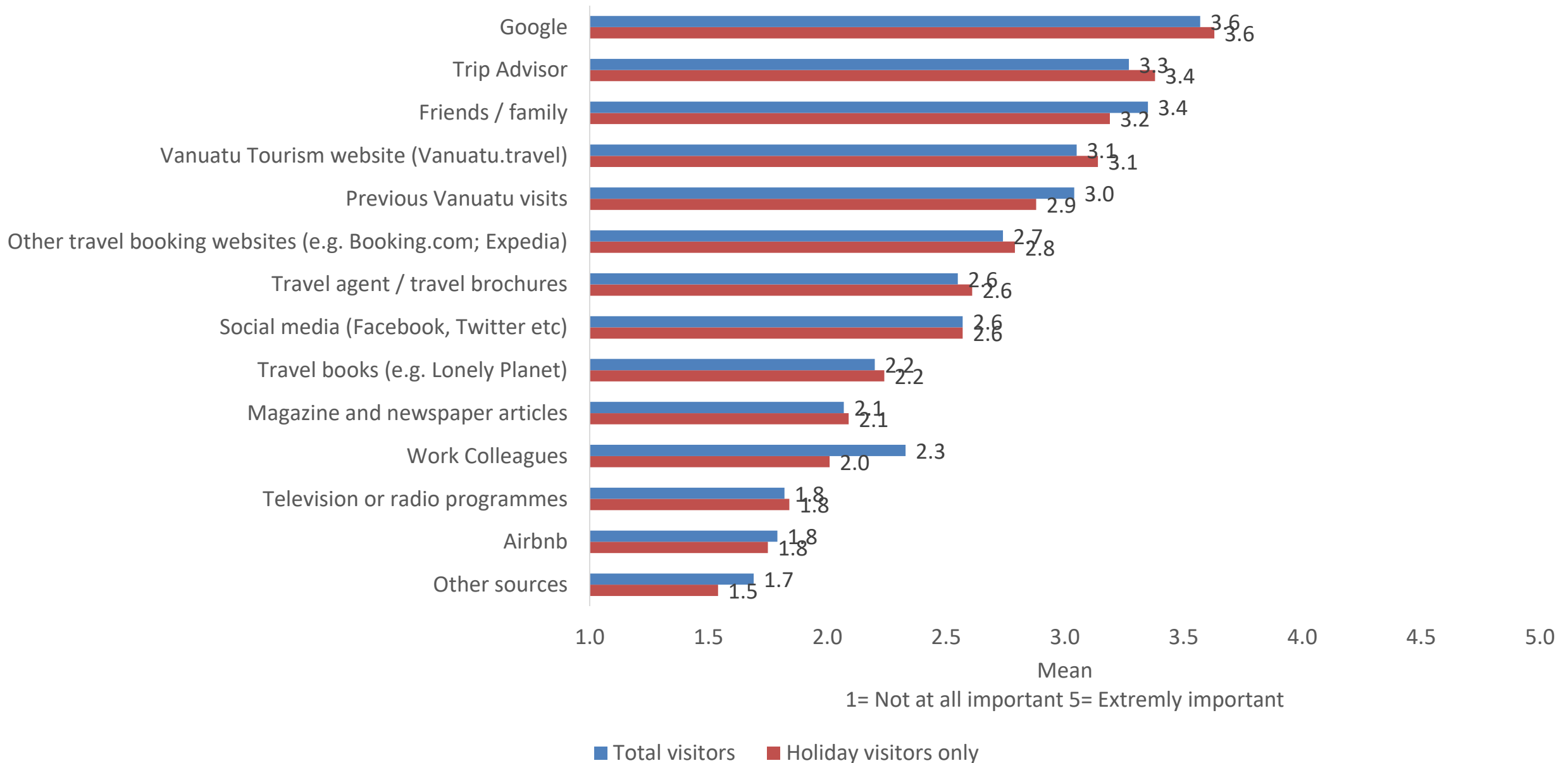
## Importance of information Sources for Planning

3.6/5 Google  
3.4/5 Friends and Family  
3.3/5 Trip Advisor  
3.0/5 Previous Visits

# Influences on the Decision to Choose Vanuatu

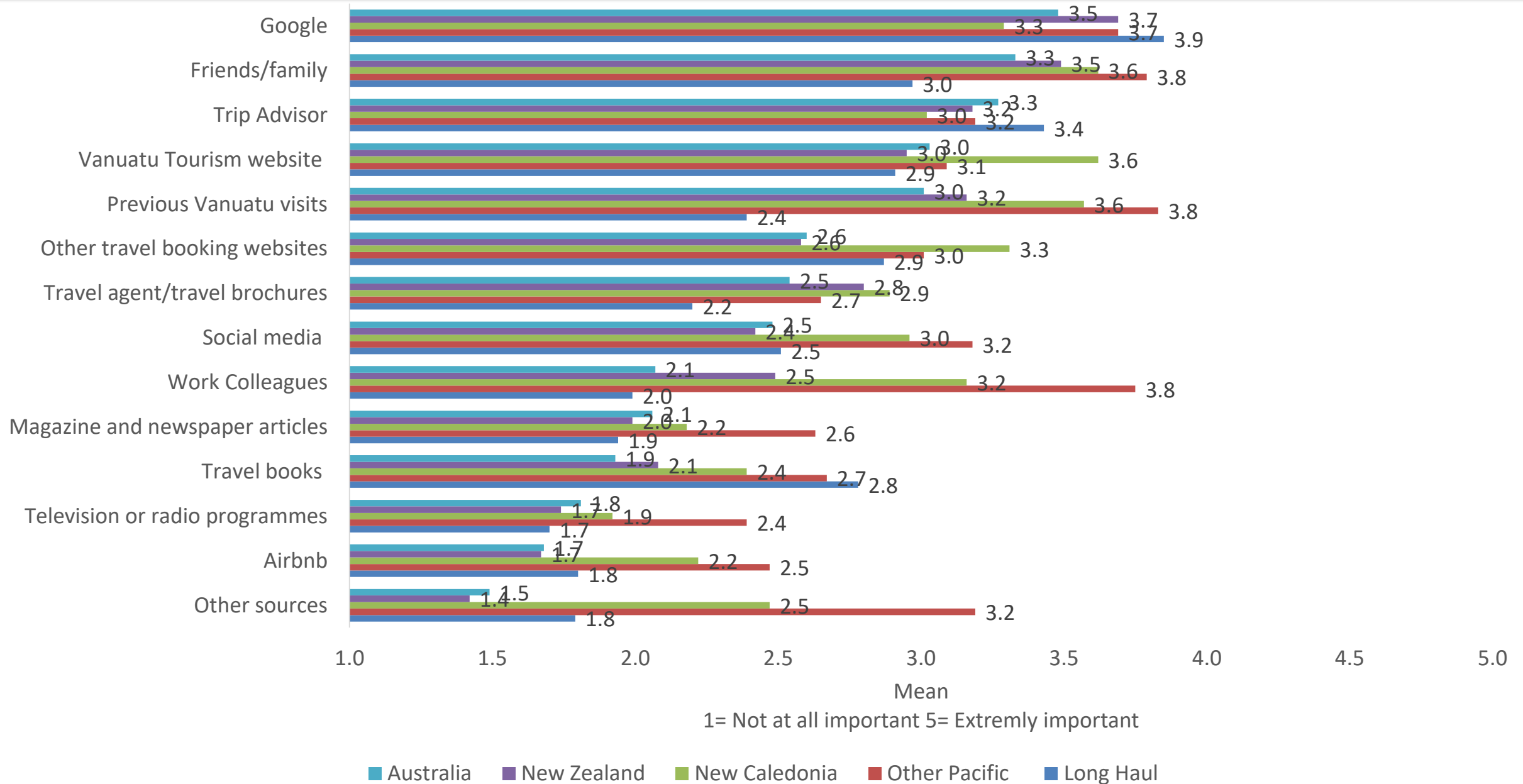
Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Experience of a different culture <b>3.8</b>	Beaches and swimming 3.7	Range of natural activities 3.6	Range of outdoor activities and experiences 3.4
New Zealand	Experience of a different culture <b>3.7</b>	Quiet and relaxing atmosphere 3.6	Beaches and swimming 3.4	Snorkelling 3.3
New Caledonia	Affordable <b>3.9</b>	Proximity/Ease of travel 3.9	Range of natural attractions 3.4	Quiet and relaxing atmosphere 3.9
Other Pacific	Business or conference <b>3.6</b>	Experience of a different culture 3.4	Proximity/Ease of travel 3.2	Affordable 3.0
Long Haul	Experience of a different culture <b>4.1</b>	Range of natural attractions 3.7	Beaches and swimming 3.4	Volcanos 3.3

# Importance of Sources Used for Planning – Holiday

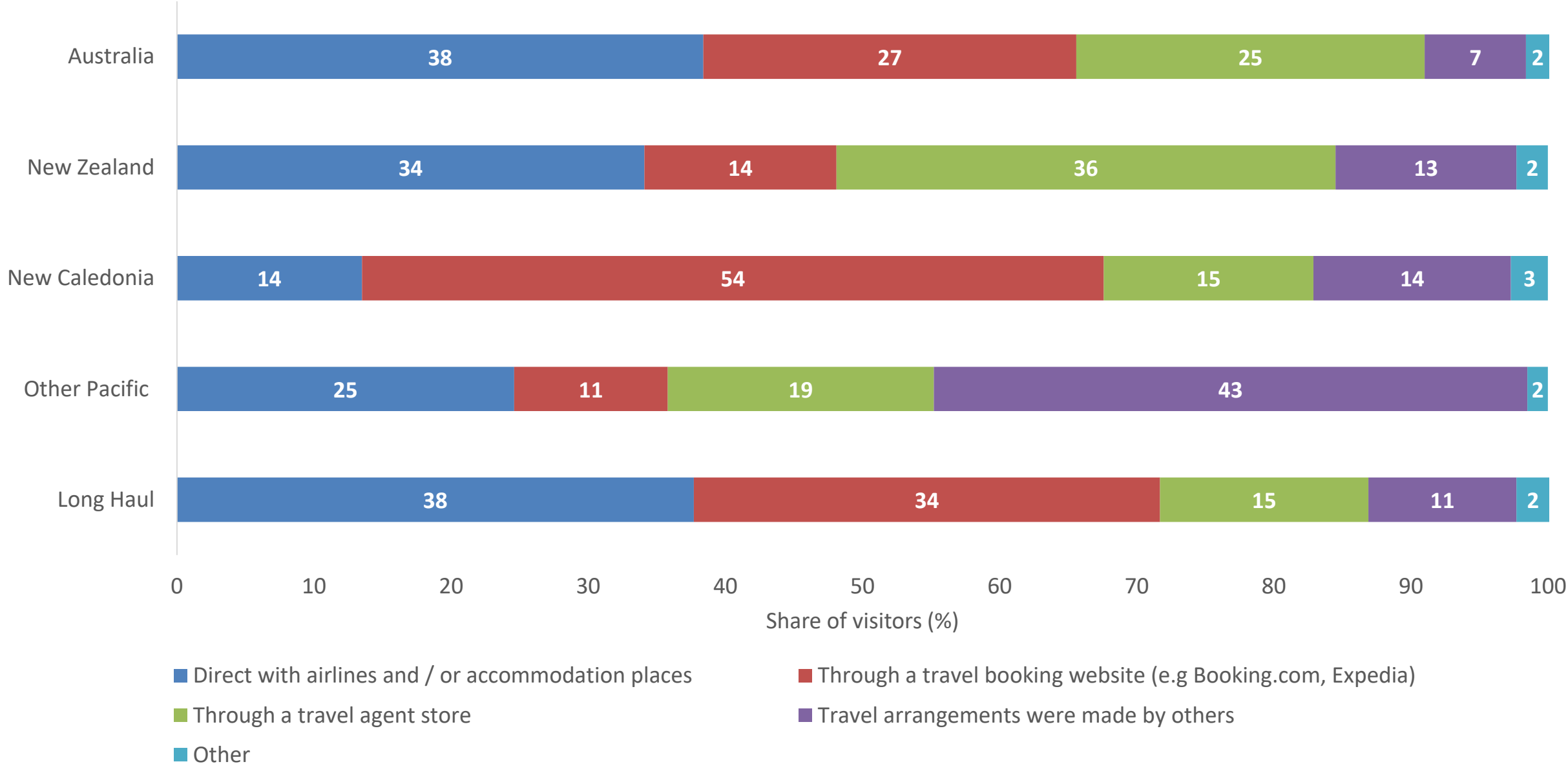




# Importance of Sources Used for Planning – Market



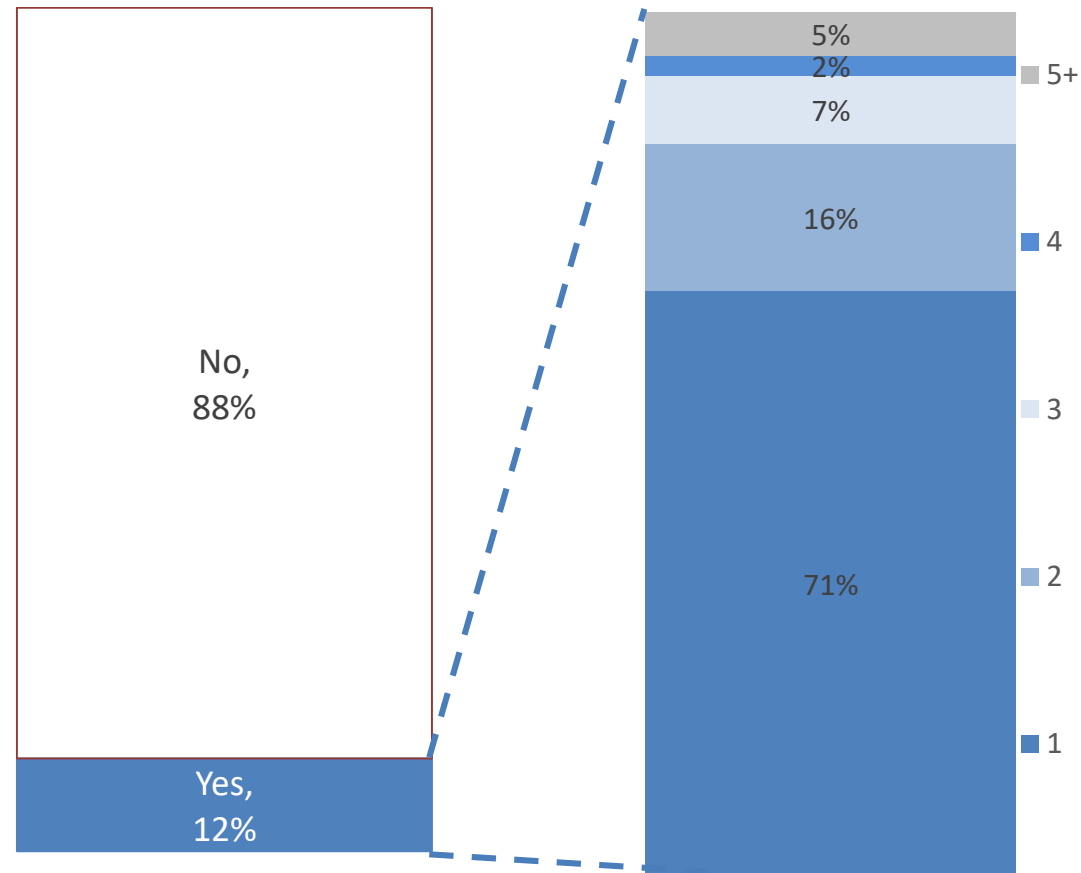
# Travel Purchasing Behaviour by Market



# Cruise Visits to Vanuatu for holiday visitors only

Been on a cruise to Vanuatu before?

If Yes, how many times?



# Presentation Structure



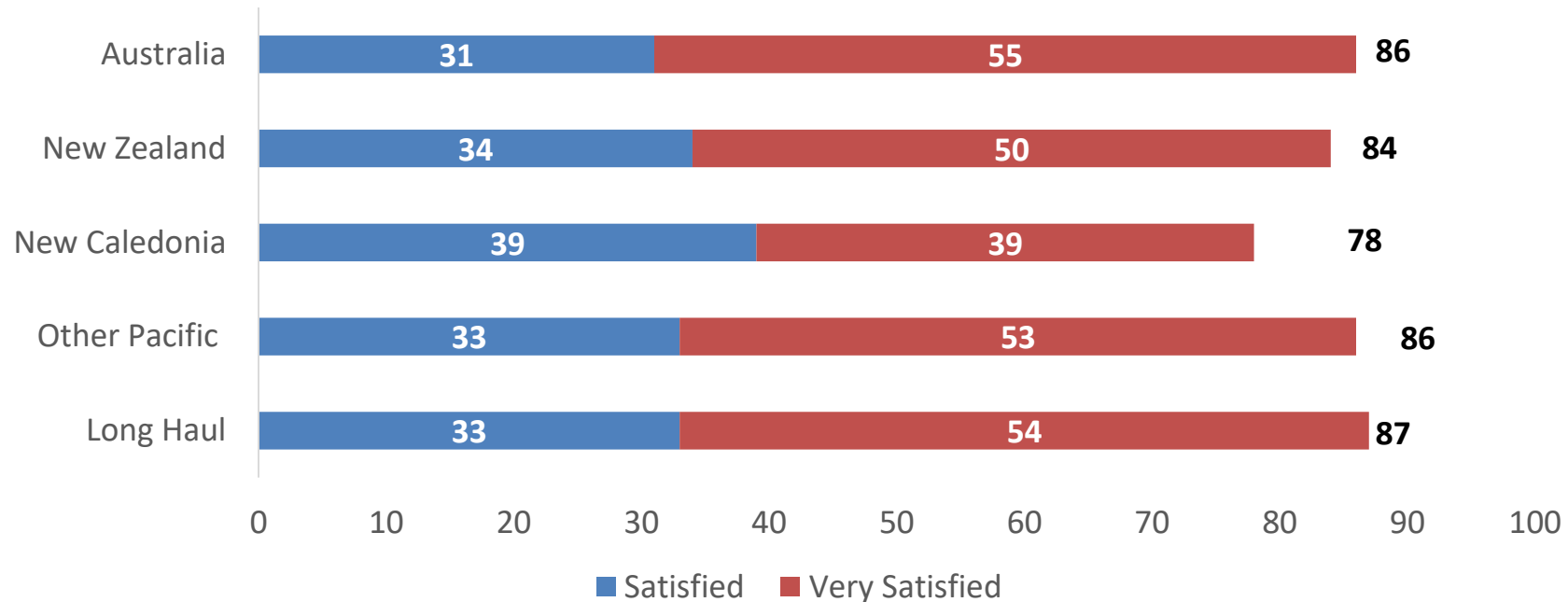
# Visitor Satisfaction

## Overall Satisfaction\*

**85%** Total visitors satisfied

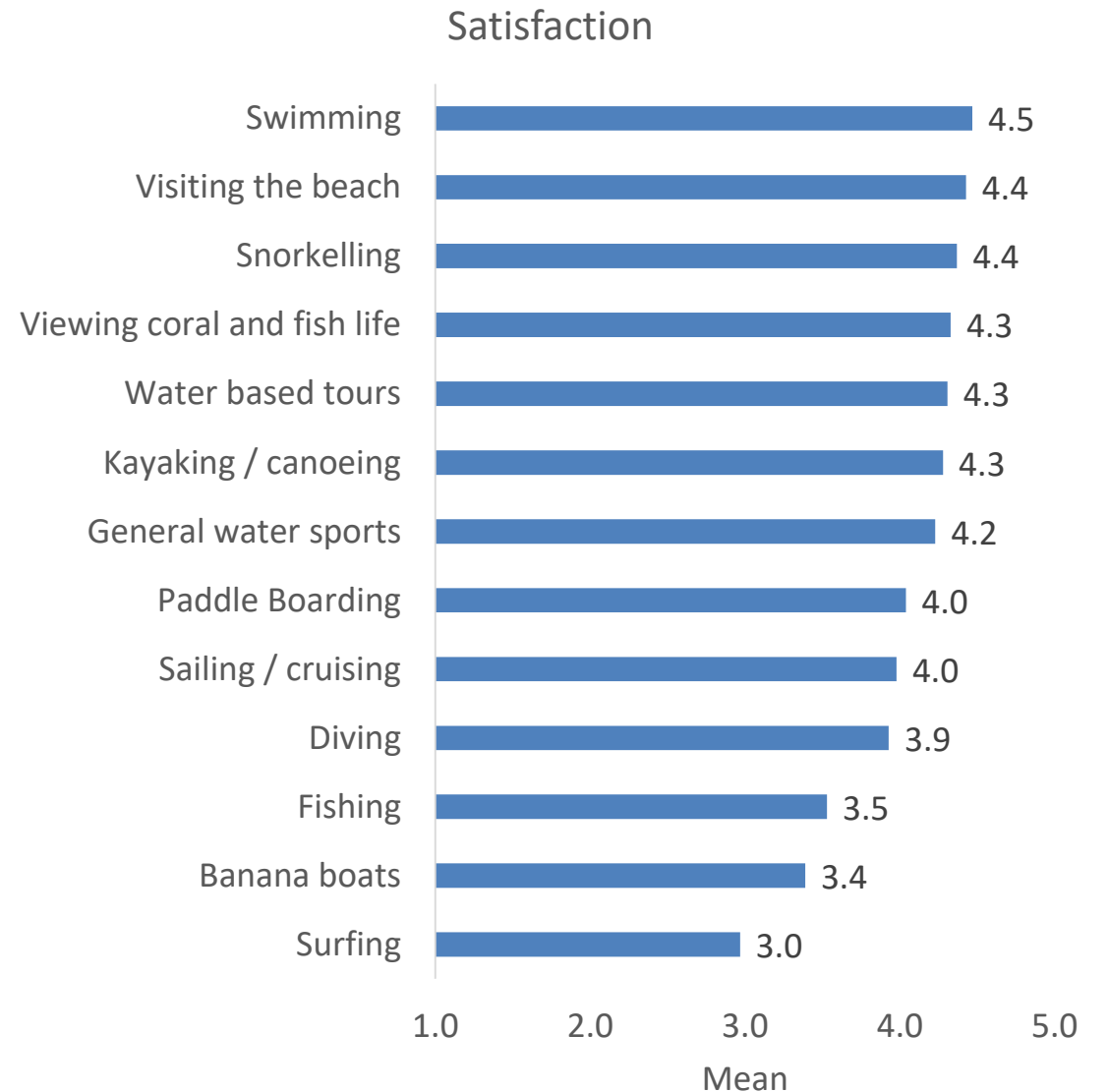
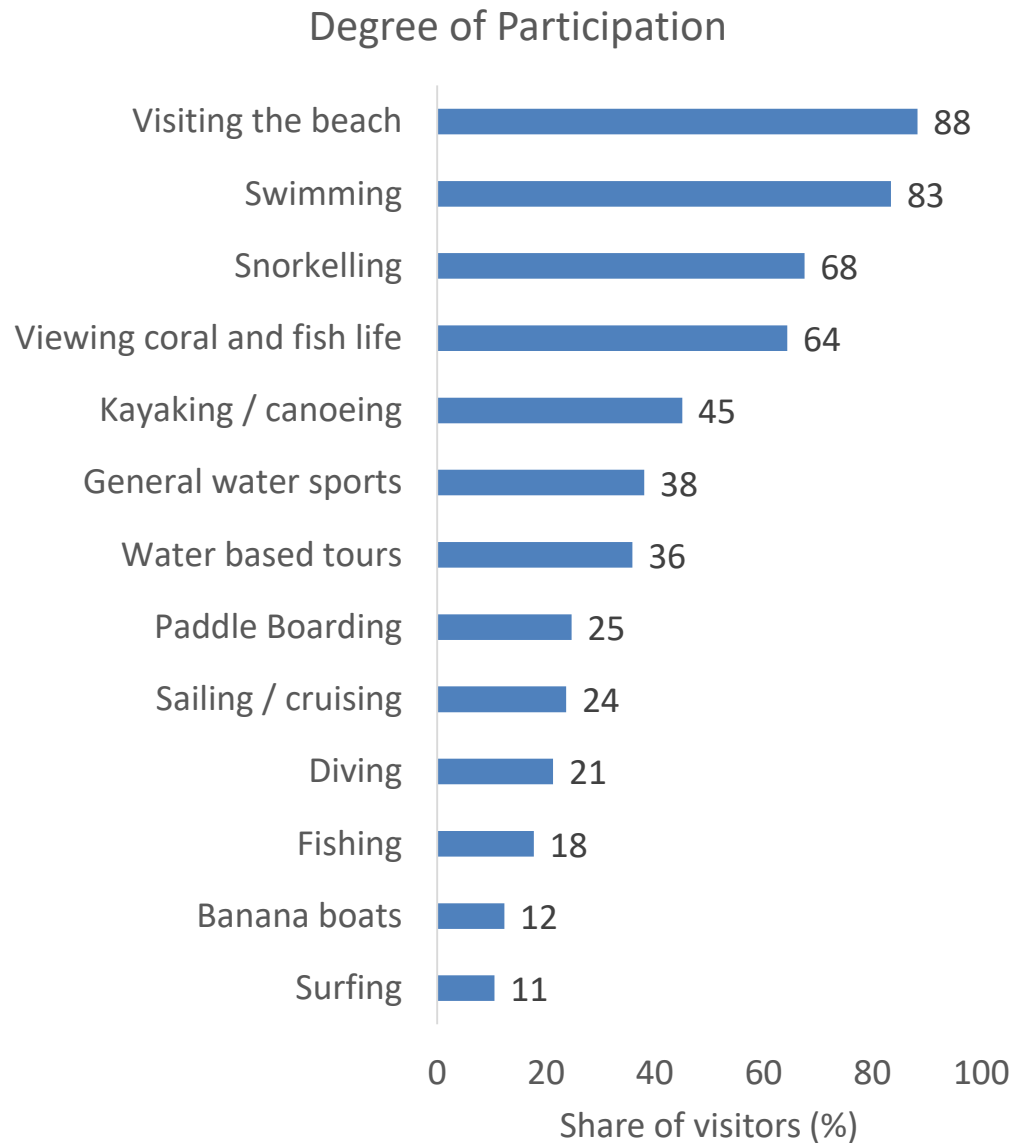
**84%** Holiday visitors satisfied

### Satisfaction by Market



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

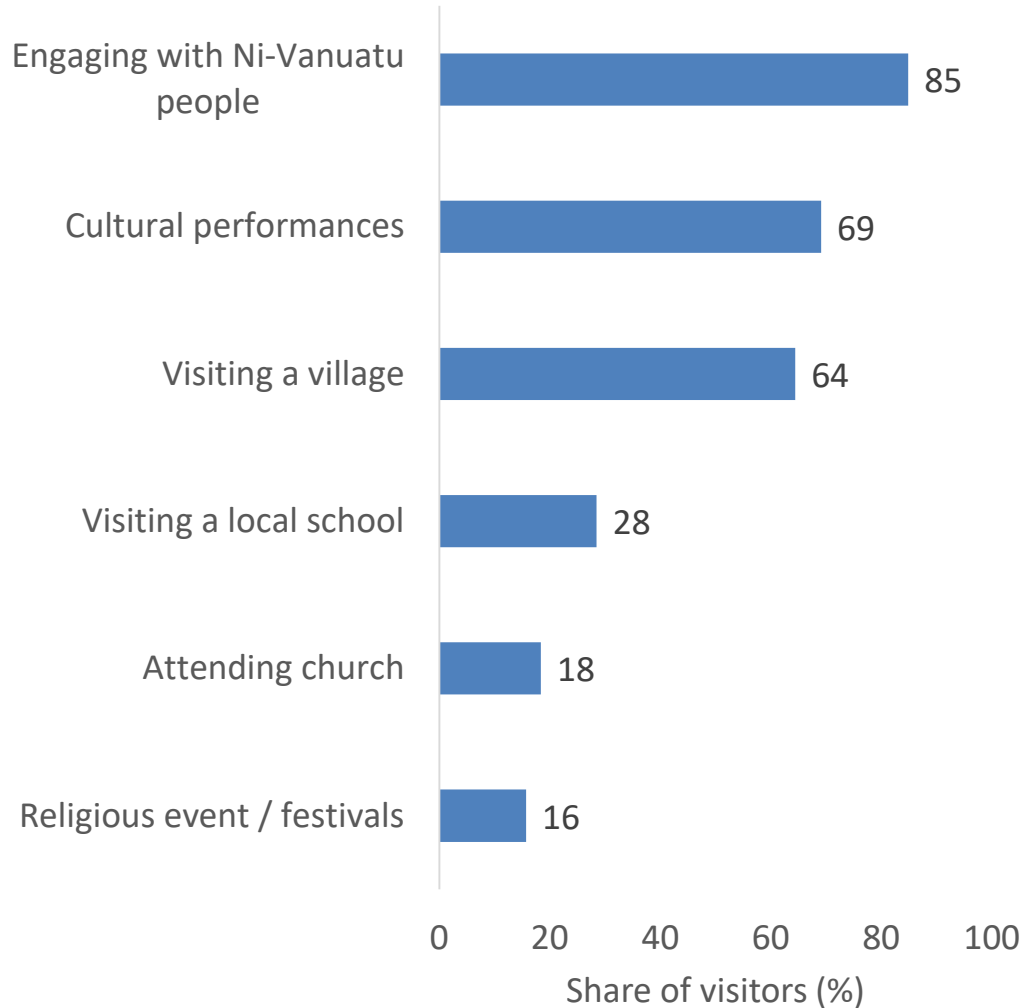
# Water Based Activities



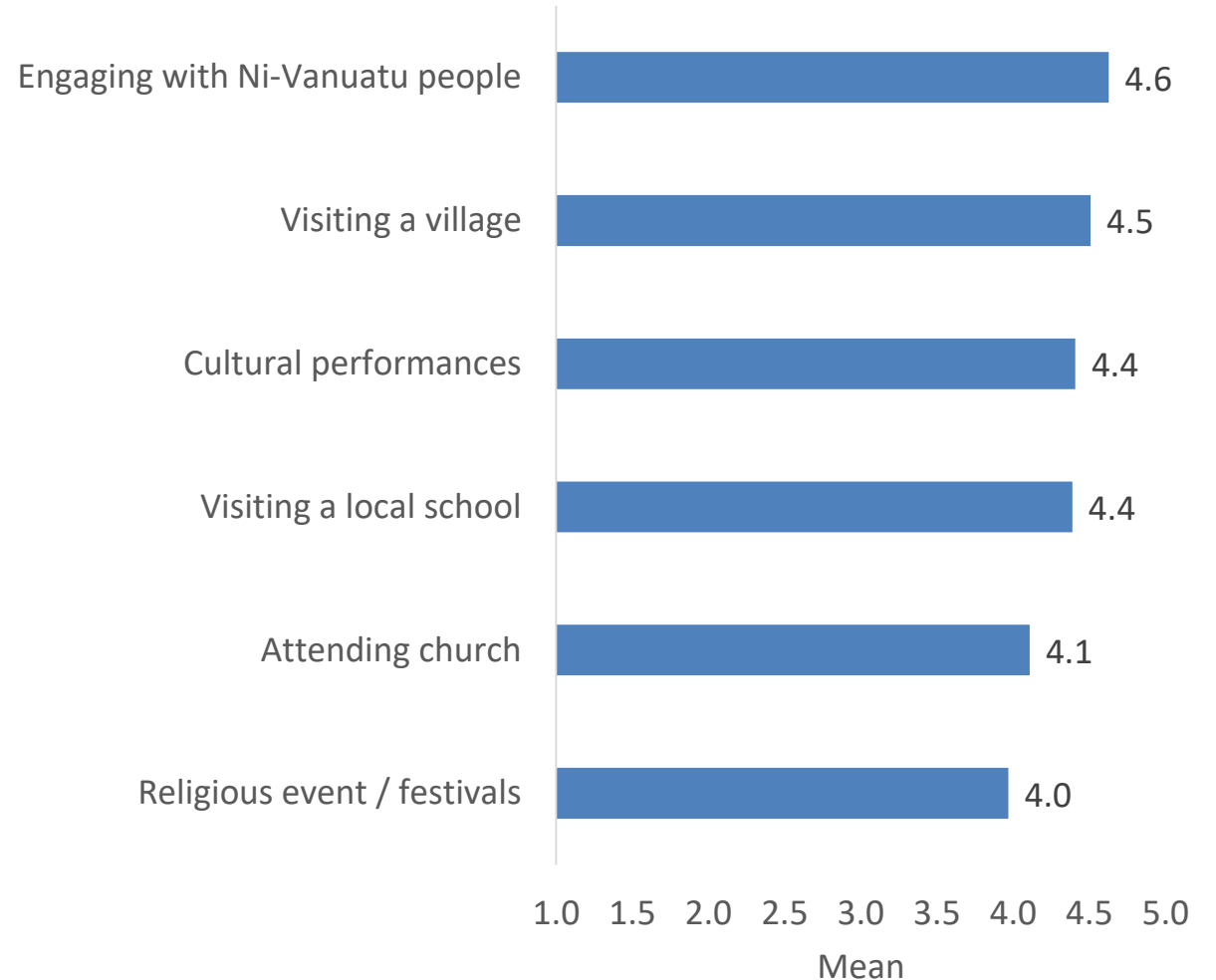
*Note: Multiple responses, therefore total does not add up to 100%*

# Cultural Interaction Activities

## Degree of Participation



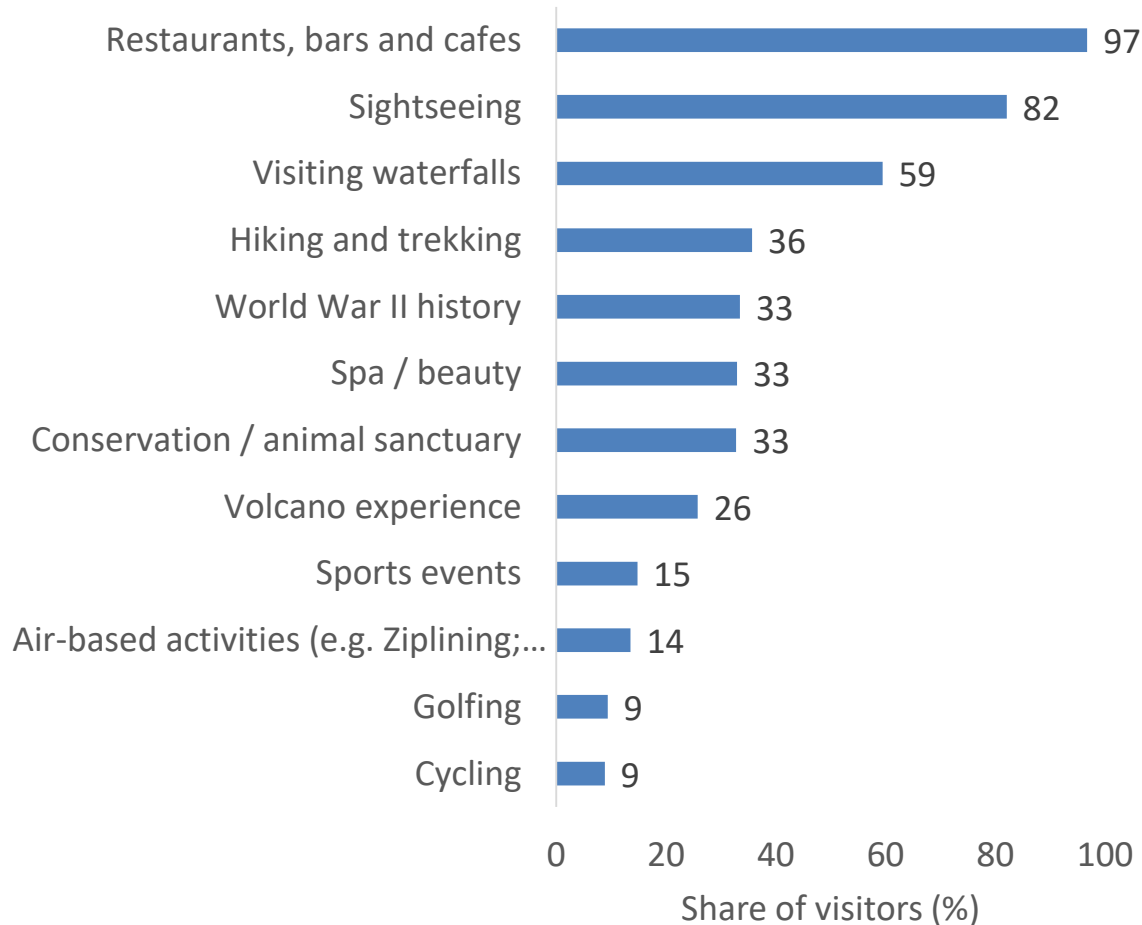
## Satisfaction



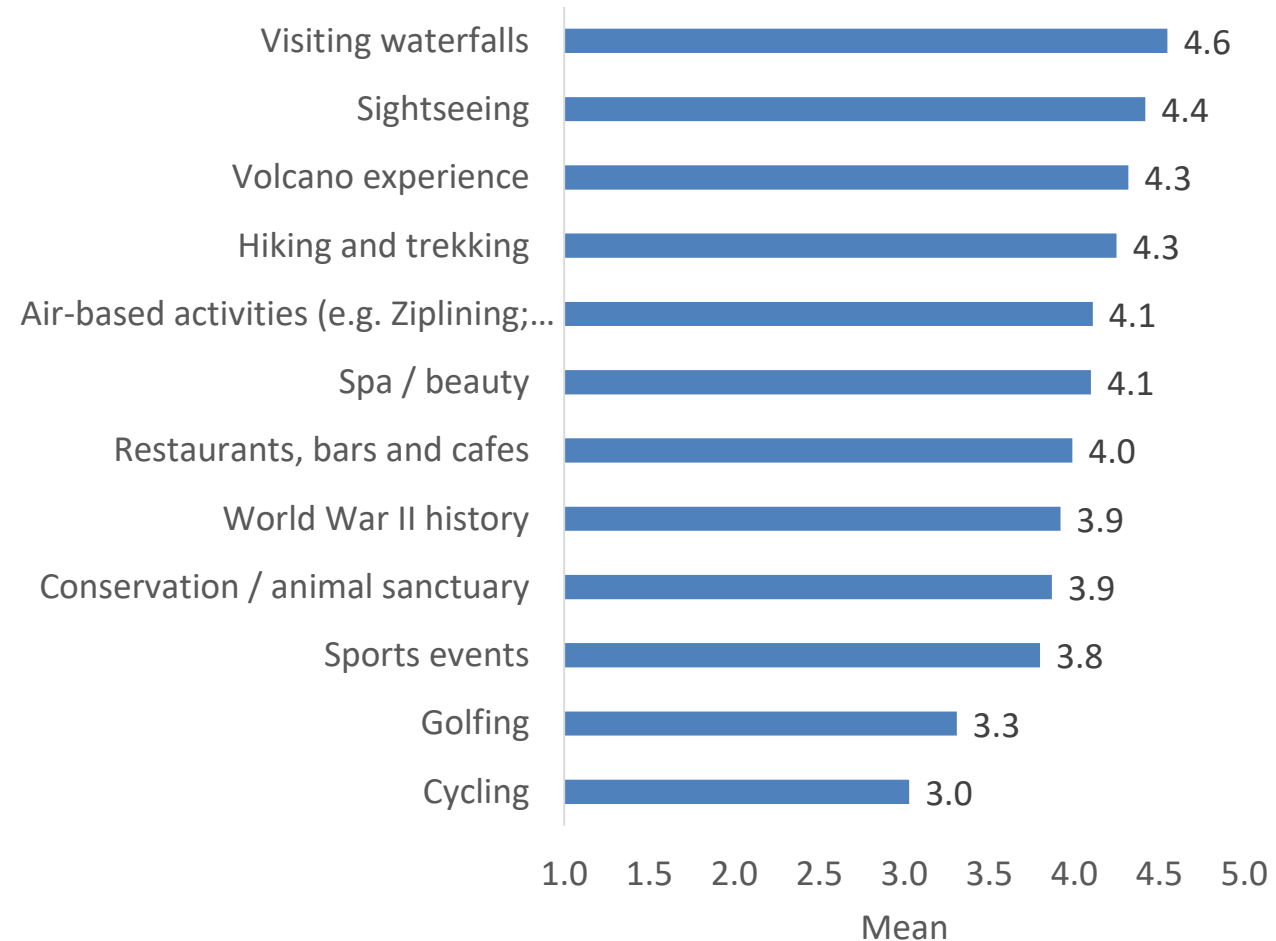
*Note: Multiple responses, therefore total does not add up to 100%*

# Land Based Activities and Touring

Degree of Participation



Satisfaction

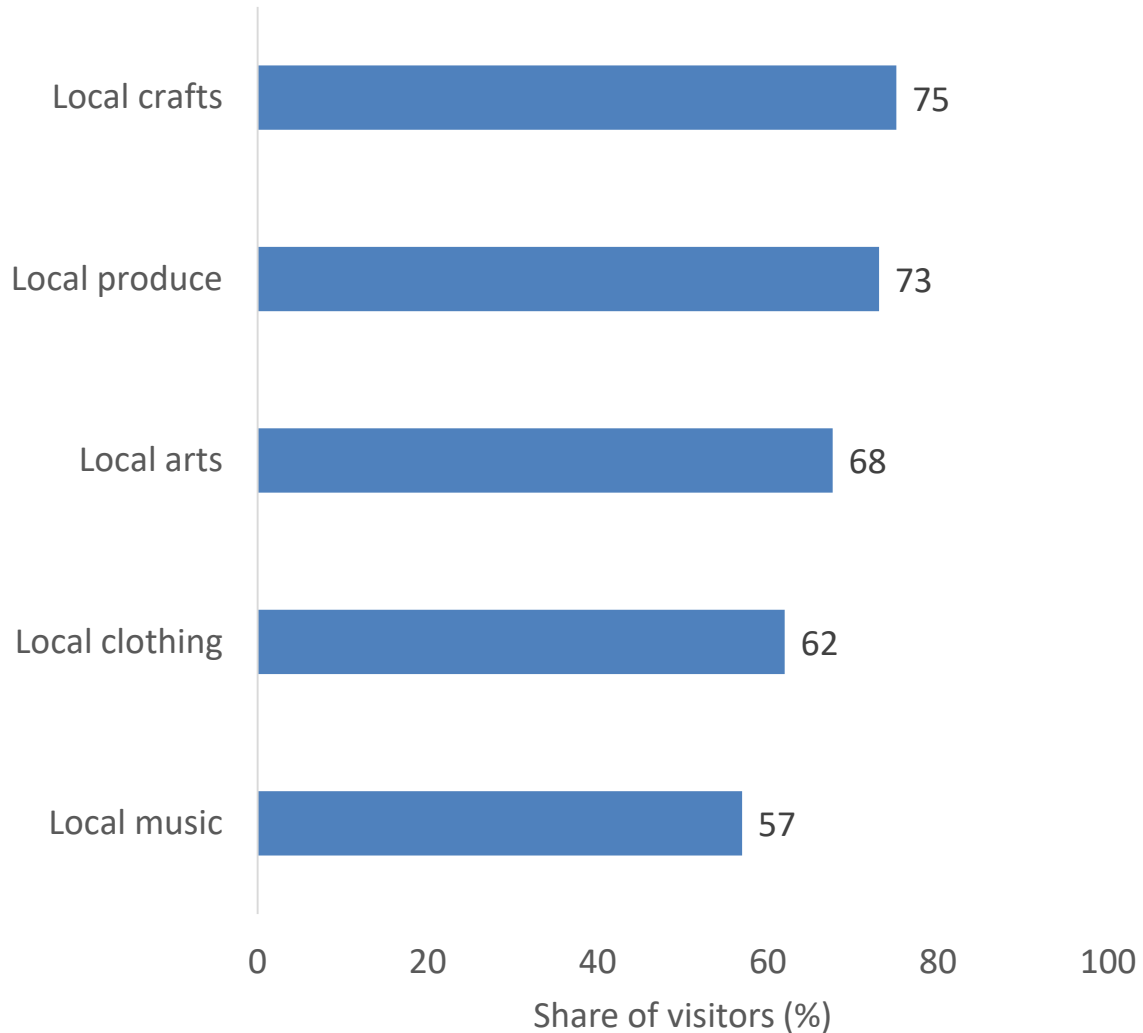


*Note: Multiple responses, therefore total does not add up to 100%*

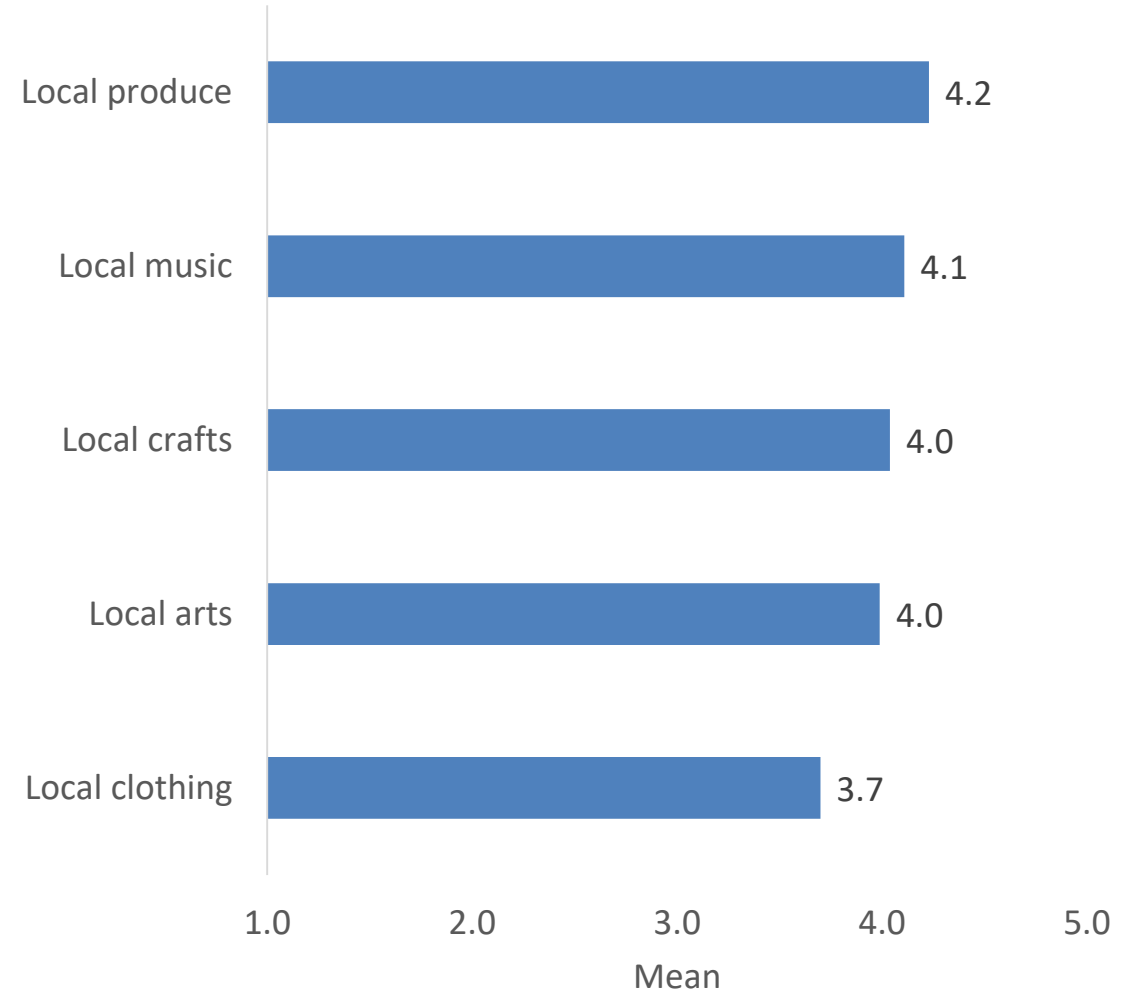


# Shopping

Degree of Participation

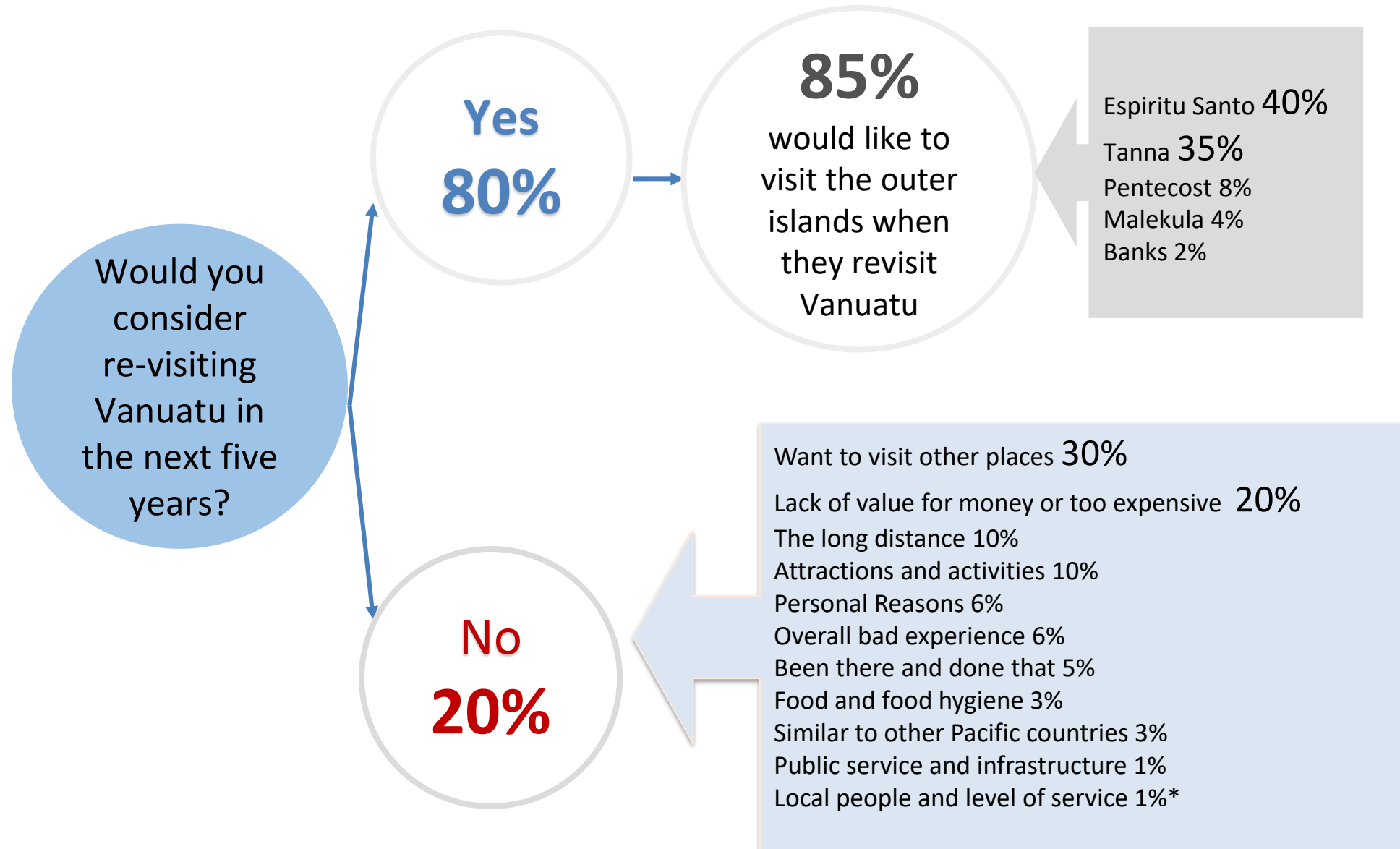


Satisfaction



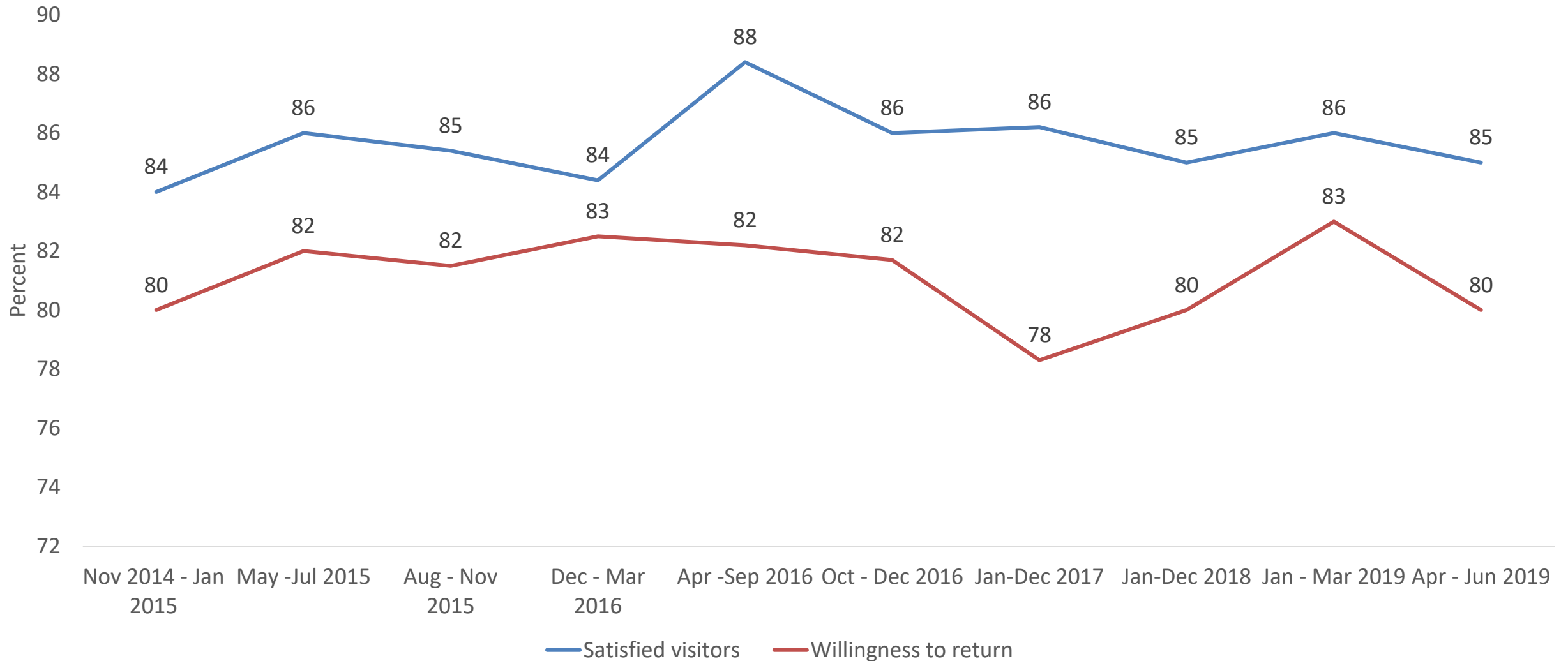
*Note: Multiple responses, therefore total does not add up to 100%*

# Willingness to Return



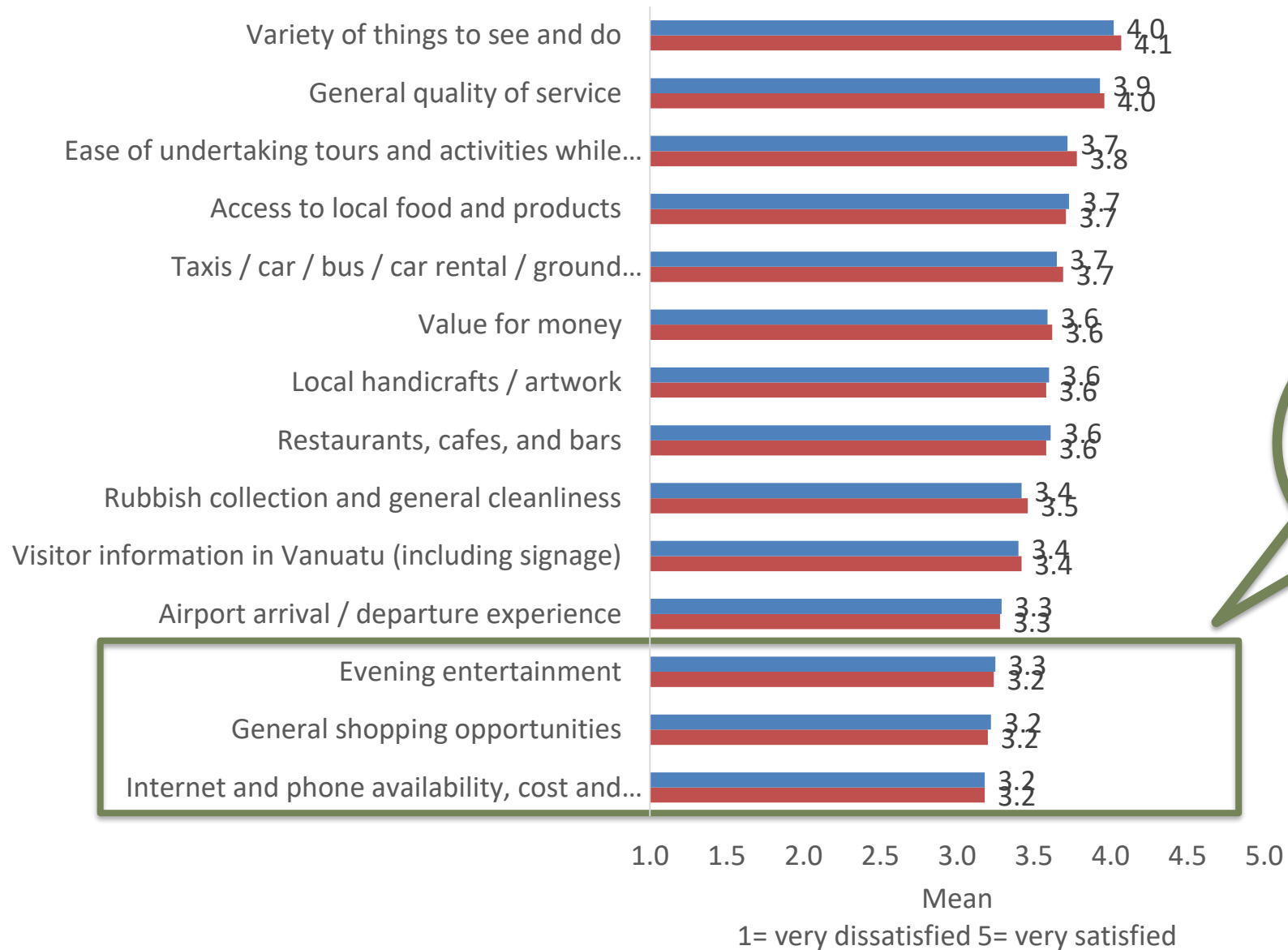
\* Other reasons/Islands have not been included due to low percentages

# Willingness to Return and Satisfaction



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

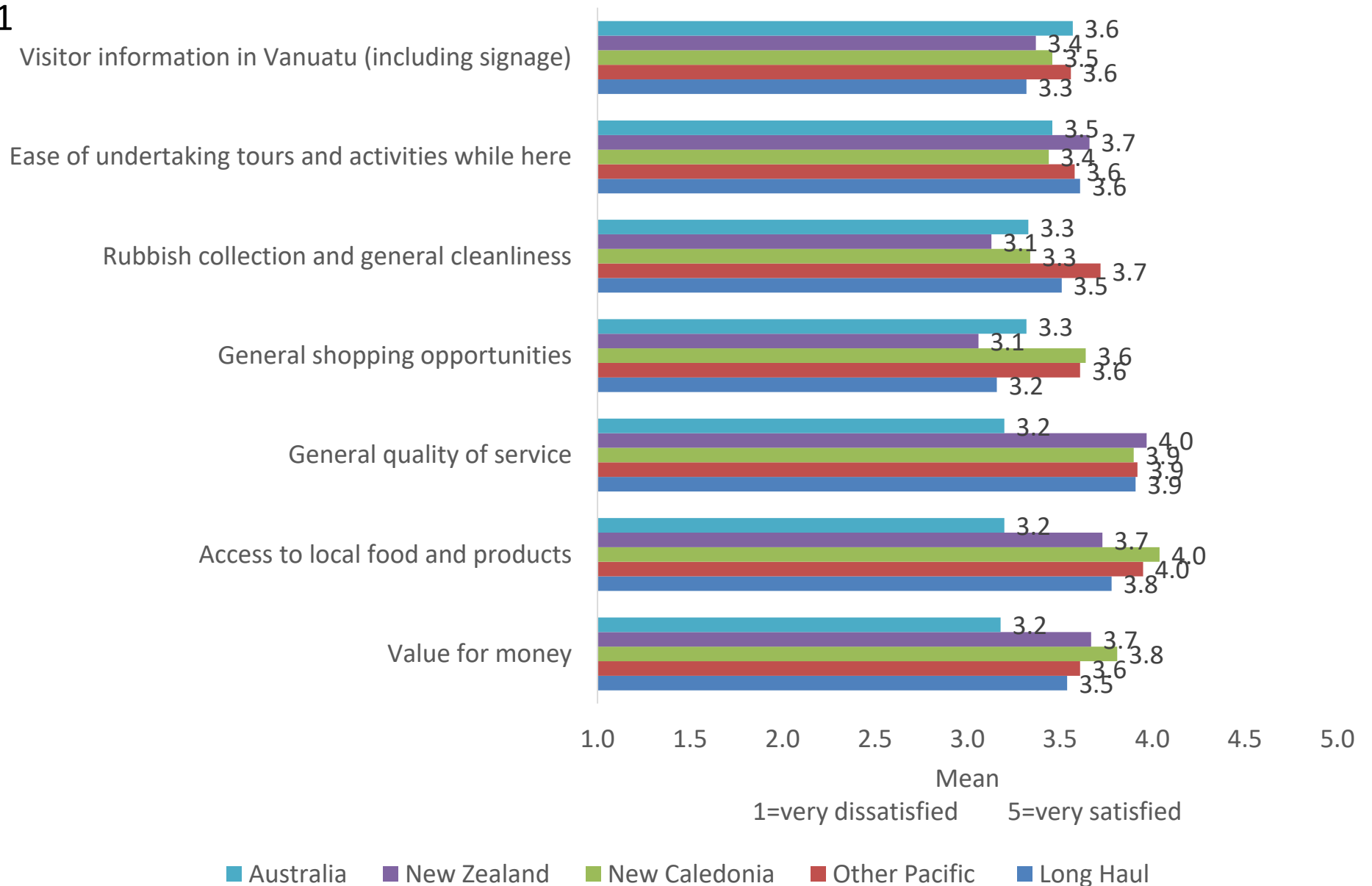
# Degree of Satisfaction – Total VS Holiday visitors



**LEAST  
SATISFIED  
ITEMS**

# Degree of Satisfaction – Market

## Market breakdown 1



# Degree of Satisfaction – Market

## Market breakdown 2



# Most Appealing Aspects

Themes	Percent
Local people	49%
Environment, cleanliness, climate	32%
Activities, attractions and entertainment events	30%
Atmosphere	14%
Food and beverage	7%
Accommodation	7%
Culture and history	6%
Convenience	5%
Level of service	3%
Uncommercial	2%
Safety	2%
Overall good experience	2%
Local market	2%
New developments	1%
Value for money	1%

# Most Appealing Aspects of Vanuatu

"The people, they were always friendly and obliging. We walked everyday and felt safe, didn't need to look over our shoulder to see if anyone was behind us. It was such a relaxed and safe holiday."

"The excellent water quality when snorkelling/diving and the generally excellent condition of the coral. Tanna was a real highlight of our time here. The volcano tour was very well run and the staff excellent."

"The range of activities (volcano, snorkelling, jungle walks, kayaking, blue holes, beaches etc). The fact that there were very few people we went was also very appealing (although we were lucky we explored the islands on non-cruise ship days!). The volcano experience was incredible - we were lucky to have good visibility when we went up and very lucky to be staying directly opposite the entrance."

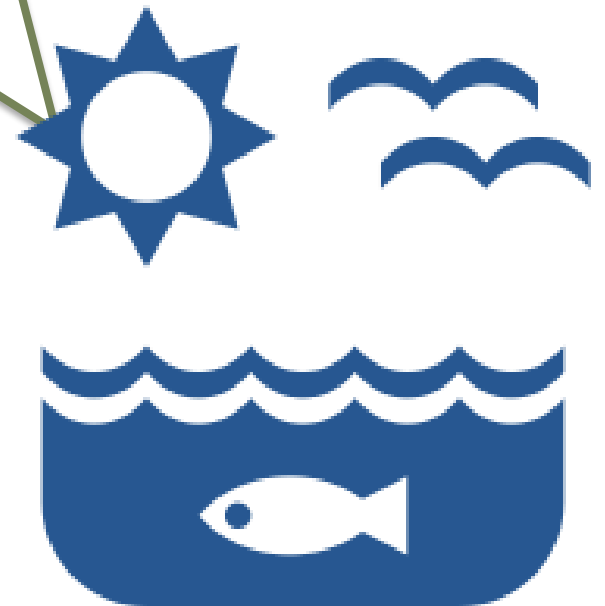




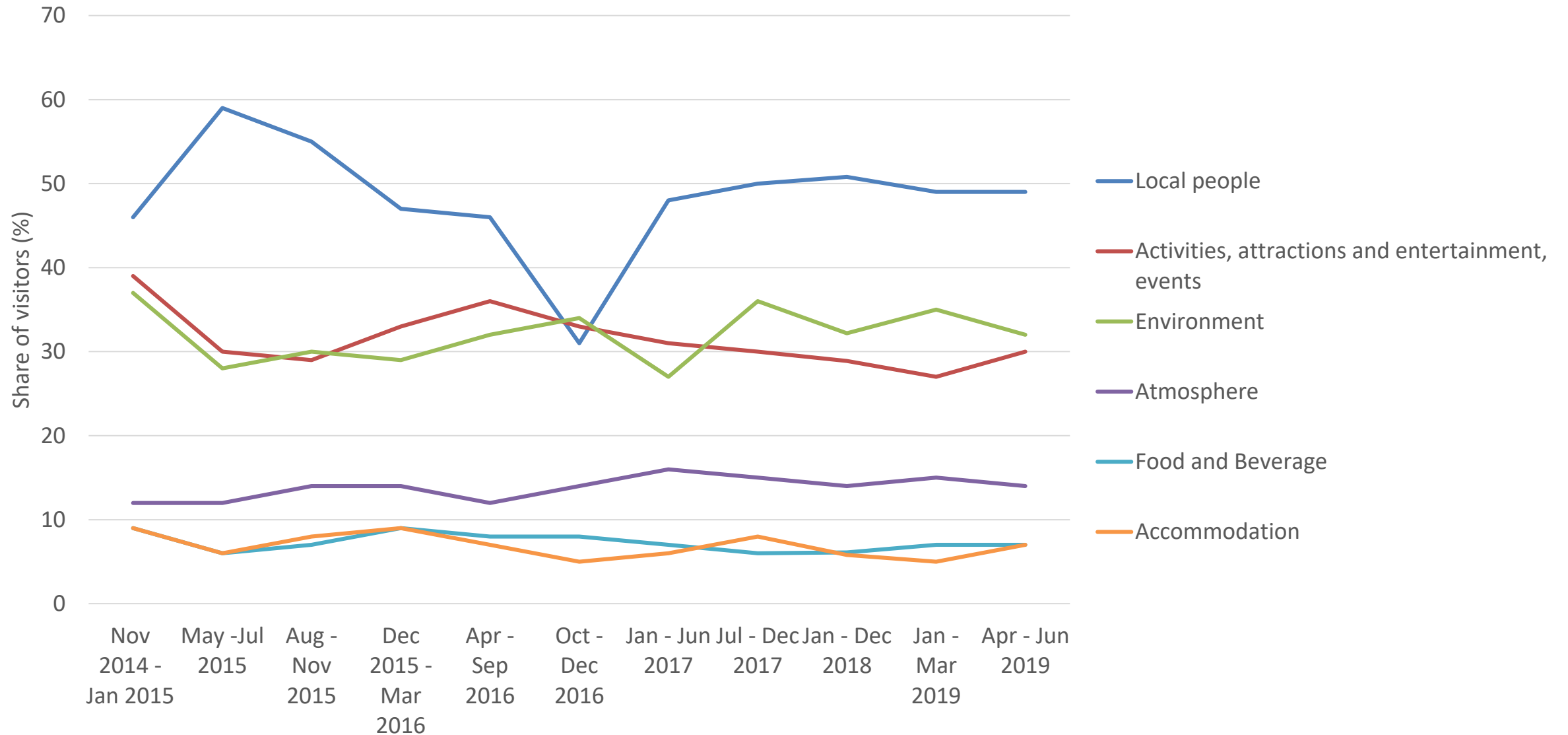
# Most Appealing Aspects of Vanuatu

"It is still a beautiful relaxing place to visit. I noticed the people are better dressed and children look healthier, also standard of schools and housing has improved since before the cyclone. The town had less litter and overall there was a more prosperous vibe. It was good to see the handcraft centre set up, although I found prices quite high. The walkway along the harbour is a great improvement."

"I was impressed that Vanuatu still felt like an untouristed destination. It was nice to see Vanuatuan's doing their thing and not overly wrapped up trying to be a tourist destination. I do hope that Port Vila doesn't loose its Vanuatuan feel."



# Most Appealing Items



# Least Appealing Aspects

Themes	Percent
Public services facilities and infrastructure	15%
Rubbish cleanliness and natural environment care	13%
Price of goods and services	12%
Airport and flight related issues	9%
Food and beverage	9%
Attractions and activities	6%
Port Vila	5%
Accommodation	5%
Chinese influence	5%
Bus, rental cars, scooters or transport	4%
Local people, standard of service	4%
Shops and the shopping experience	4%
Social divide and social issues	3%
Weather	1%
Information	1%
Stray animals and mosquitos, diseases	1%*

\* Other reasons have not been included due to low percentages

# Least Appealing Aspects of Vanuatu

"The airport service was absolutely terrible. It takes a very long time per person when you arrive to go through customs. This is unacceptable, and we very nearly missed our connecting flight. There are no announcements or communication at the airport, and it is very unclear how to change to the next flight."



"Food was incredibly expensive and not great, and the locals living conditions and pays, pay them more they will work happier."

# Least Appealing Aspects of Vanuatu

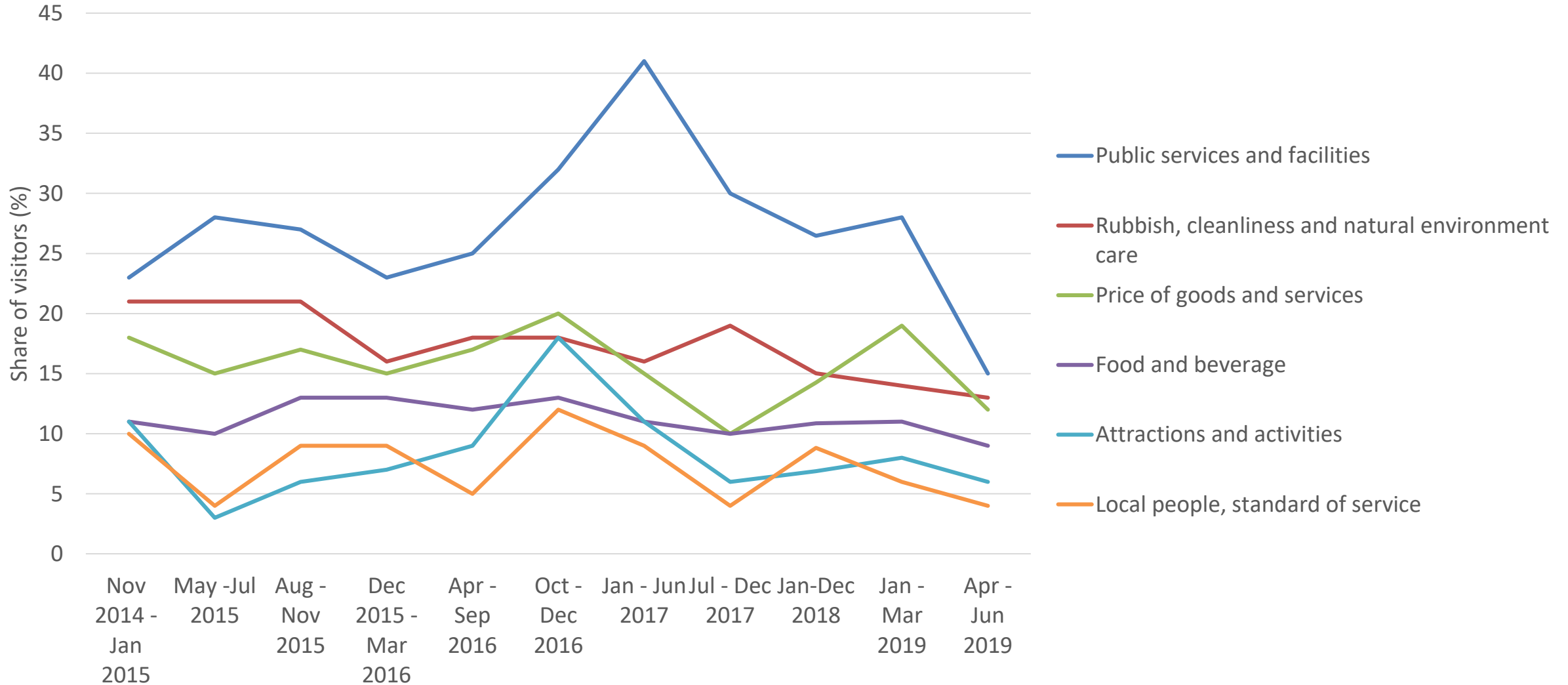
"The Arrival at the airport was a bloody shambles too few immigration officers who were hampered by a pathetic computer system. 2 plus hours to clear entry is an off putter to any visitor in the past the manual system cleared us in about 30 mins if on the next visit in Oct its the same we will go elsewhere worst experience in the last 16 or 17 visits."

"Rubbish, in the water and on the streets. No proper rubbish disposal and all of the coastline littered. The snorkelling we did was good and the water there seemed rubbish-free, however, when we went for walks, there was a lot of rubbish on the side of the roads and in the undergrowth."

"The excessive number of Chinese who have taken over businesses from the ni-Vanuatu's. I fear that the Chinese are starting to control Vanuatu through economic stealth and economic reliance. It is worrying also to hear that all new members to the parliament are required to go to China for 'education'."



# Least Appealing Items

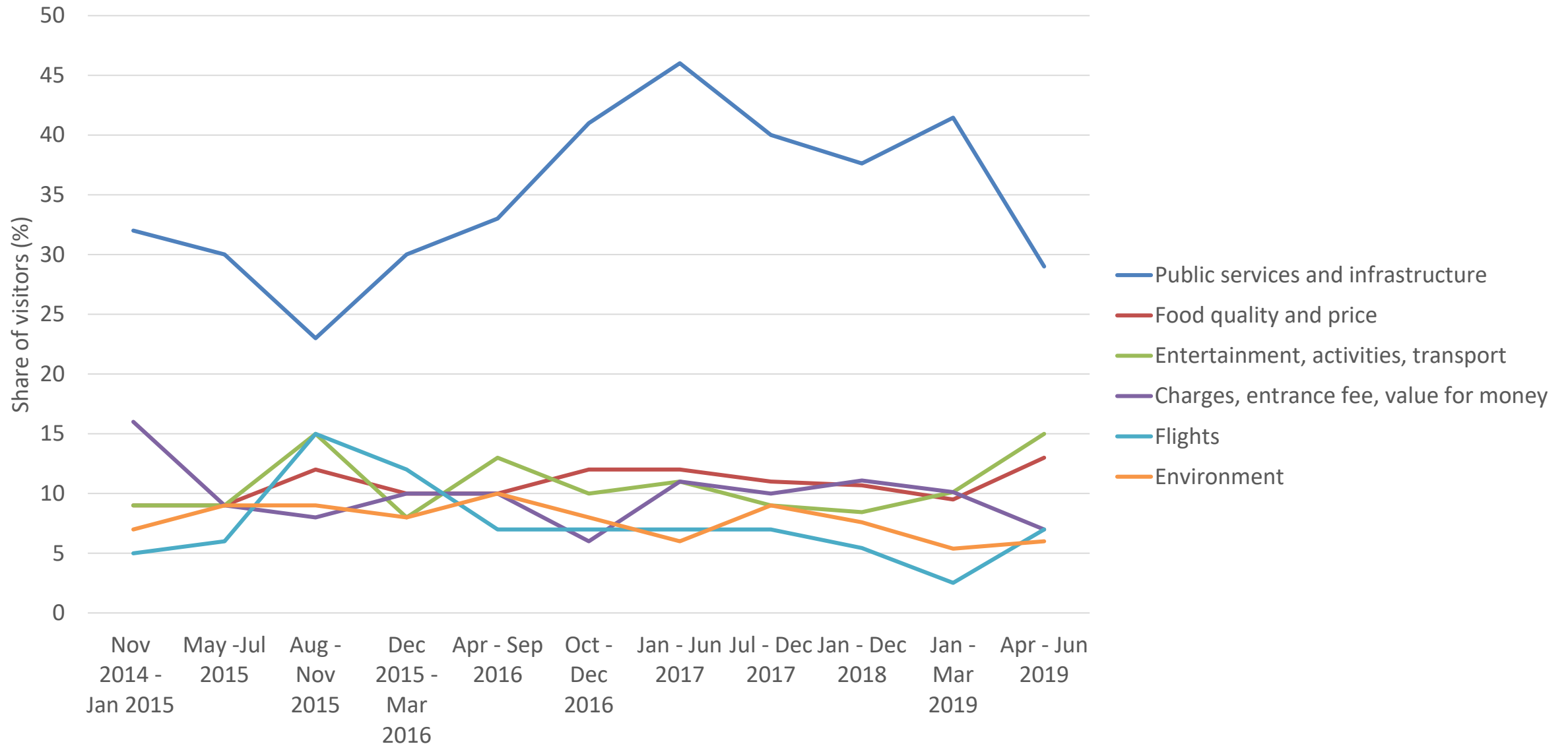


# Suggestions for Improvement

Themes	Percent
Public services and infrastructure	29%
Entertainment, activities, transport	15%
Food quality and price	13%
Flight related Issues	7%
Local people, standards of service	7%
Charges, entrance fee, value for money	6%
Environment (cleanness, rubbish, nature)	6%
Accommodation	6%
Stayed longer, visit other islands and see more	5%
Shopping experience	4%
Weather	3%
Safety	2%*

\* Other reasons have not been included due to low percentages

# Suggestions for Improvement





# THANK YOU



**Simon Milne**

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