

# Vanuatu International Visitor Survey

Jan – Jun 2018



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



# Summary of the Key Findings

## Total Direct Economic Impact for Jan-Jun 2018

US\$80.4 Million (Vt 8.7 billion) directly flowing to Vanuatu Economy

US\$ 1,540 (Vt 166,337) per visitor per Trip; 52,131 visitors in all

US\$195 (Vt 21,057) per visitor per day

### Respondent Profile and Characteristics

- 74% from Aus/NZ
- 76% under 59 years
- 55% female
- 71% household income less than \$100,000

### Decision Making

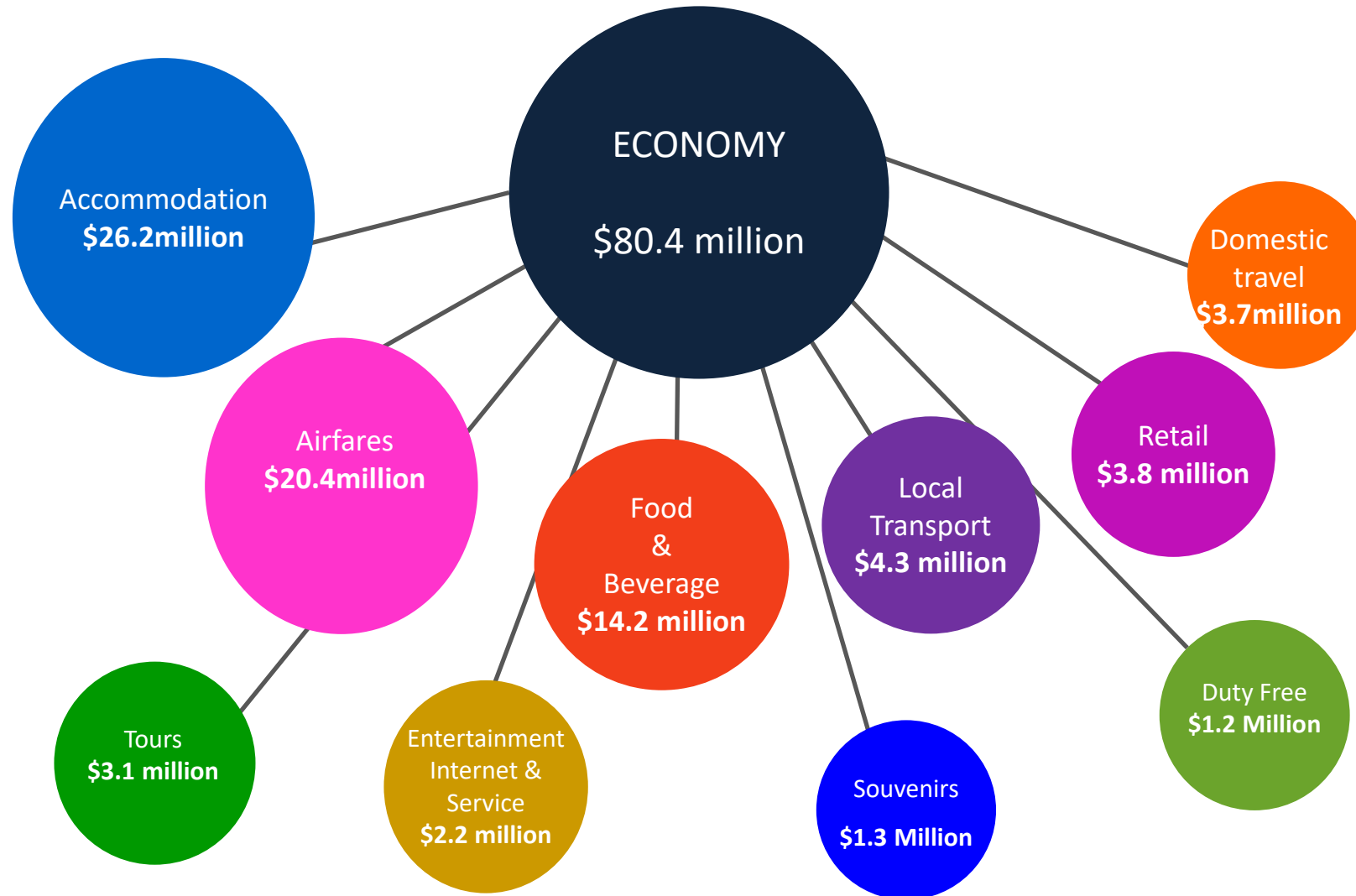
- Friends and family , previous visits, and Google are key sources for finding Vanuatu as a destination
- 36% purchased by direct with airlines and/ or a accommodation places

### Satisfaction

- 81% would come back
- Satisfied with local people, environment, activities and attractions
- Public service and facilities, prices of goods and services, rubbish least appealing

# Direct Economic Impact for Jan – Jun 2018

## Pre-Arrival and in Country Spend



# 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

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**

# 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

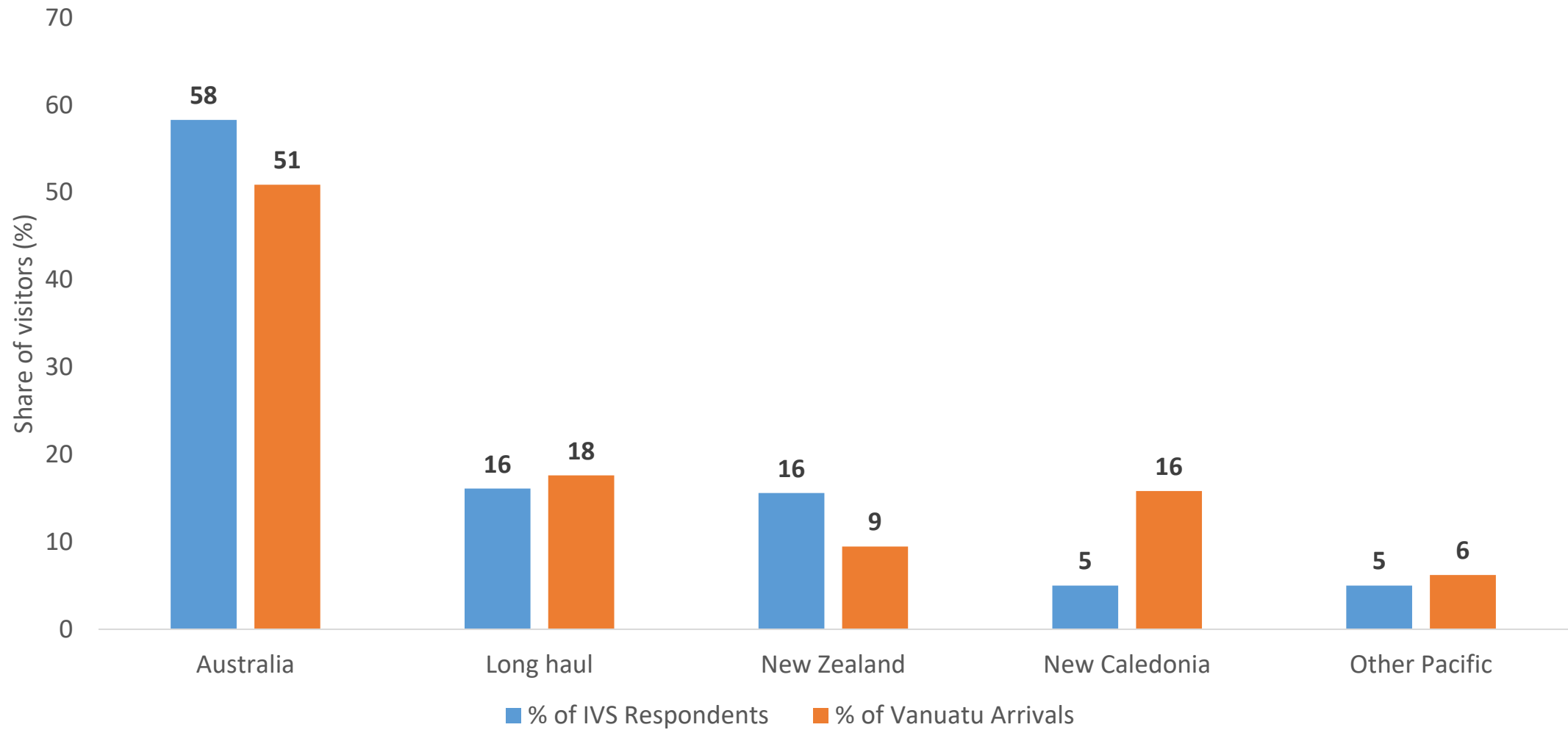
- 58% Australia
- 16% Long Haul
- 16% New Zealand
- 5% New Caledonia
- 5% Other Pacific

## Gender



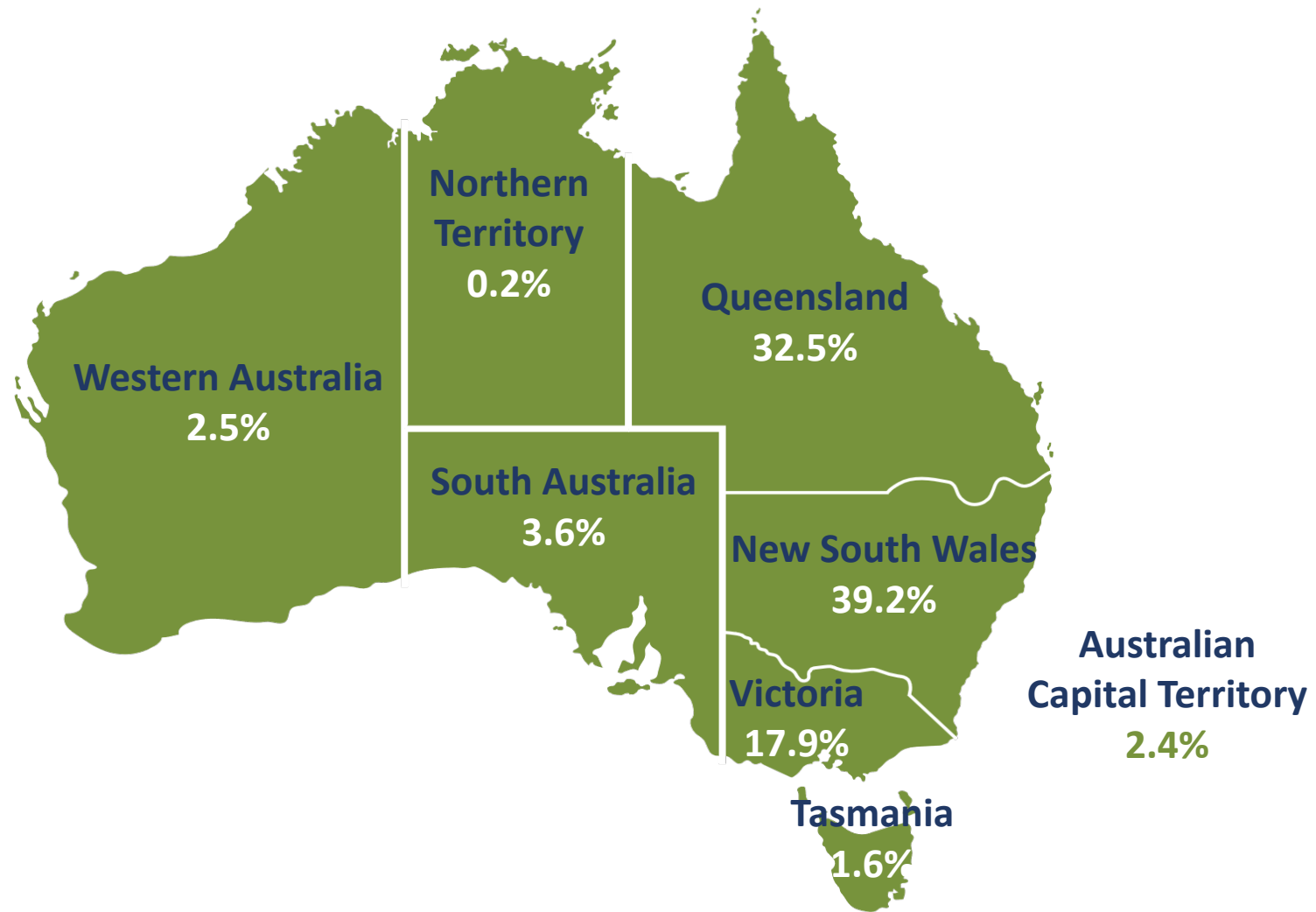
Females

# Country of Origin



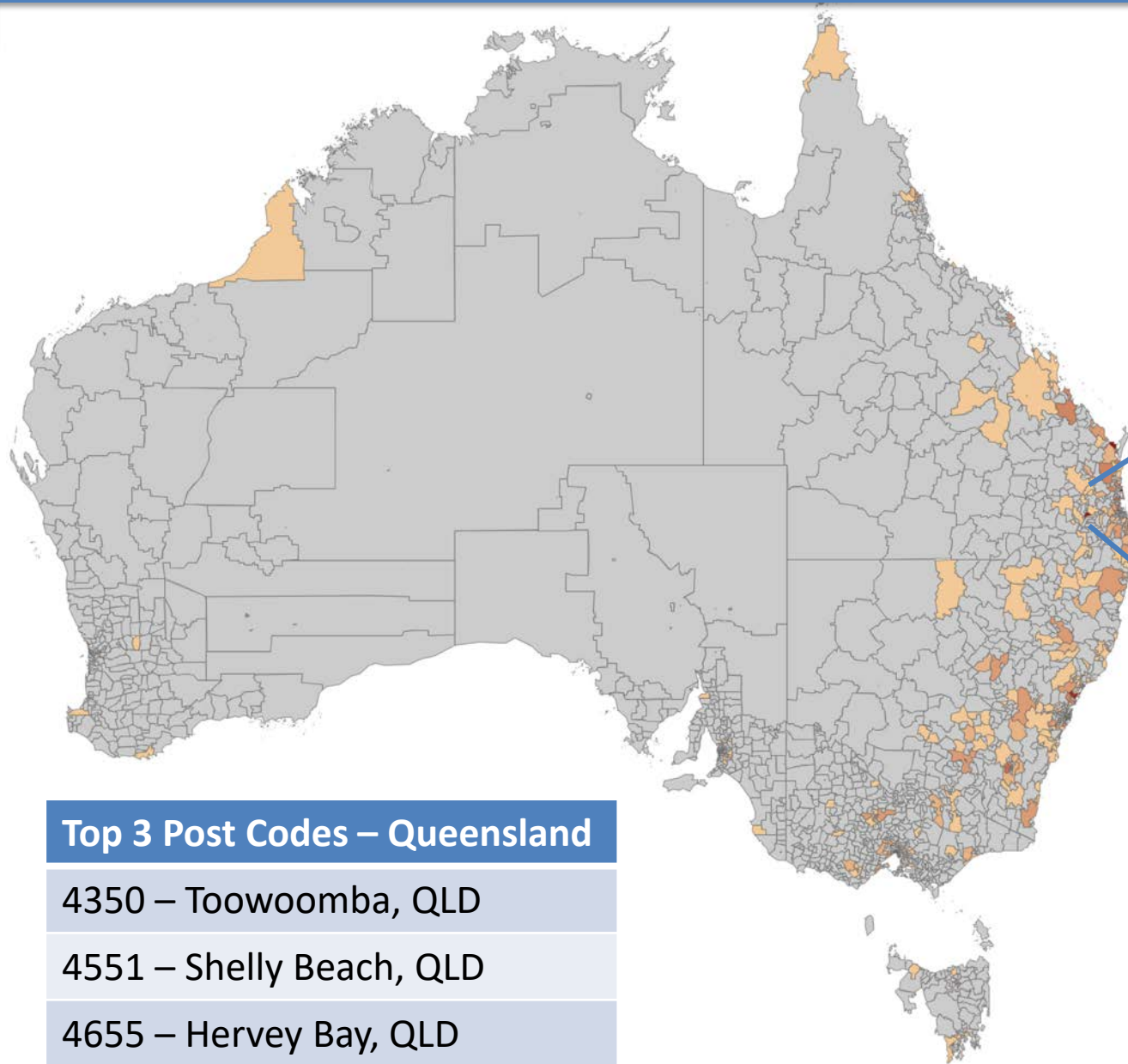


# Australian Respondents - IVS Respondent Data



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

# Heat Maps for Australia (January-June 2018)

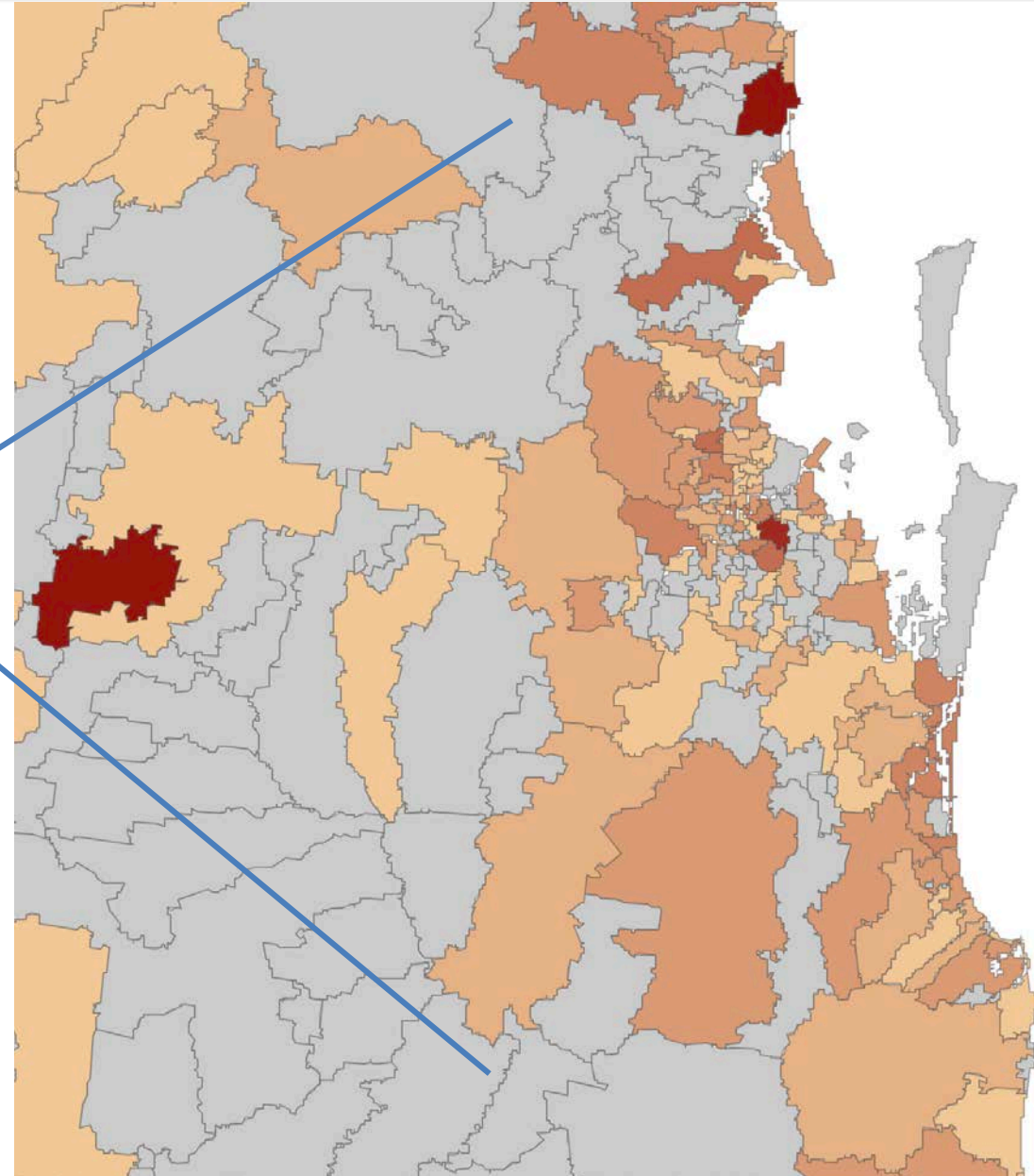


## Top 3 Post Codes – Queensland

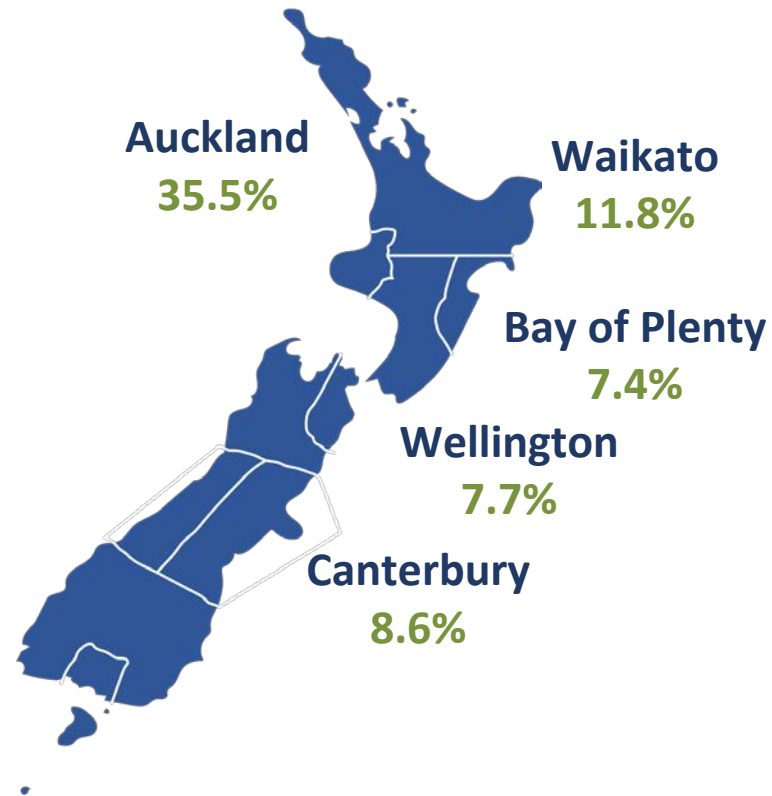
4350 – Toowoomba, QLD

4551 – Shelly Beach, QLD

4655 – Hervey Bay, QLD

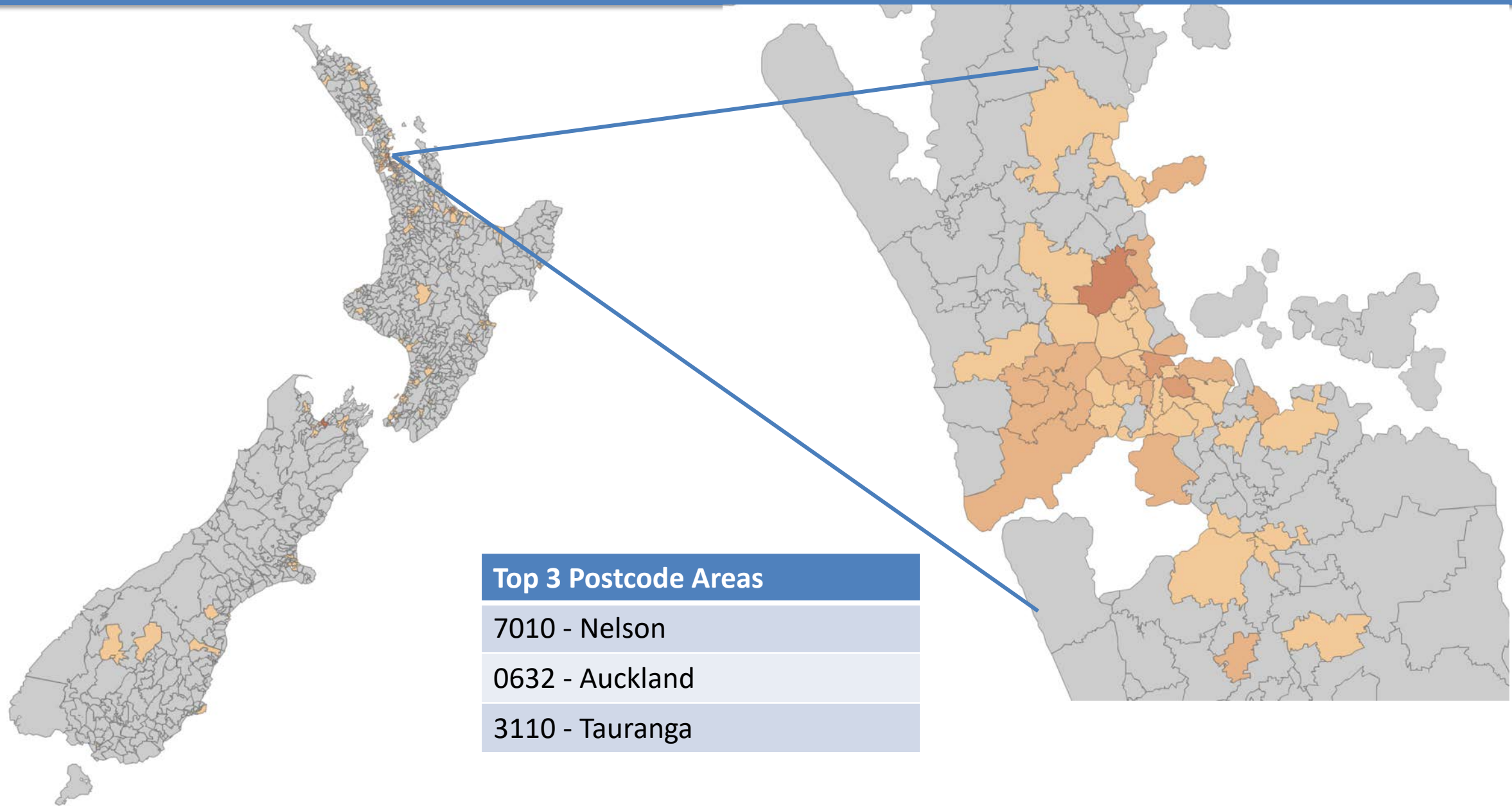


# New Zealand Respondents - IVS Respondent Data



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

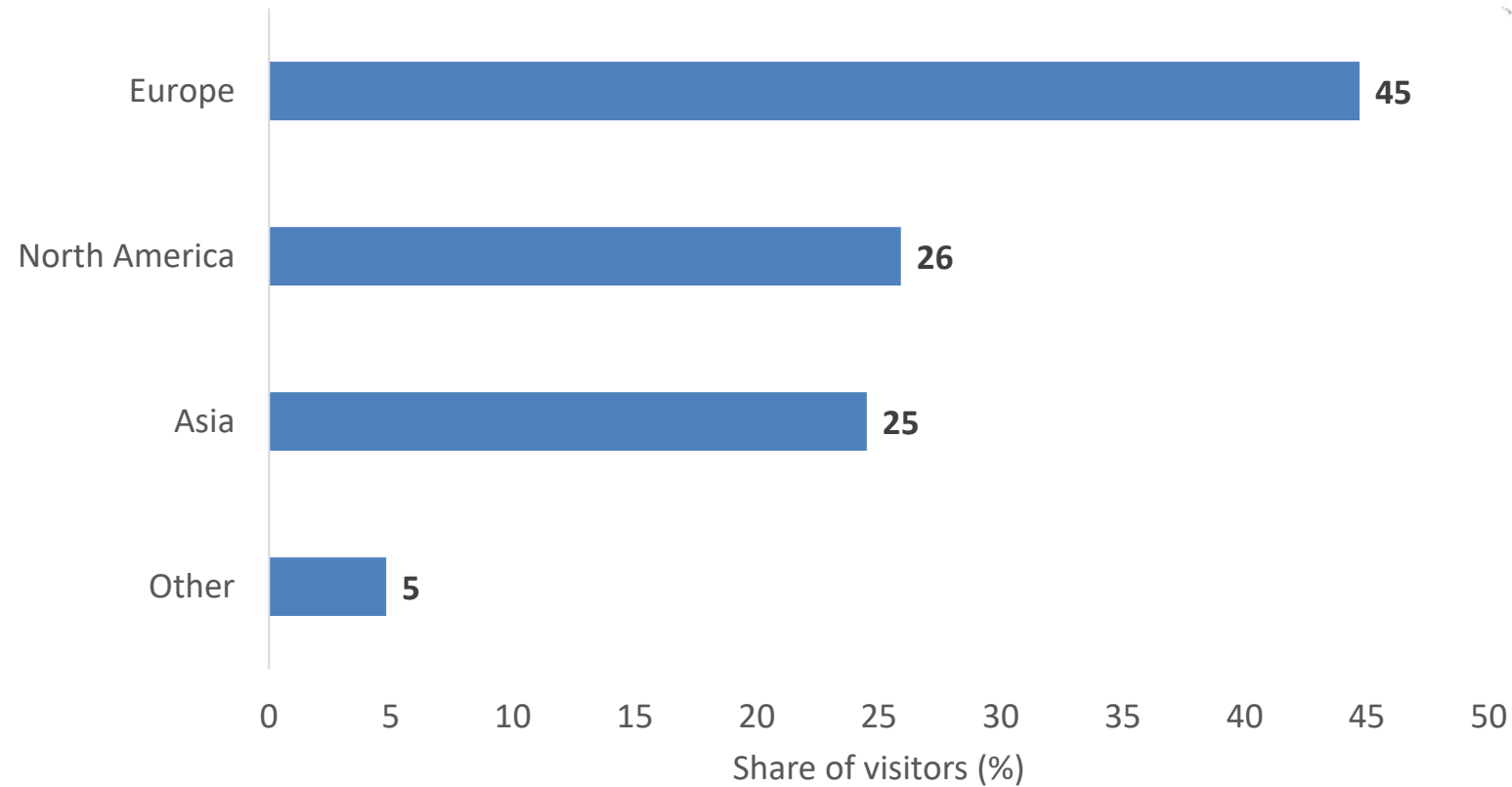
# Heat Maps for New Zealand (January-June 2018)



# Long Haul Market- Region Breakdown

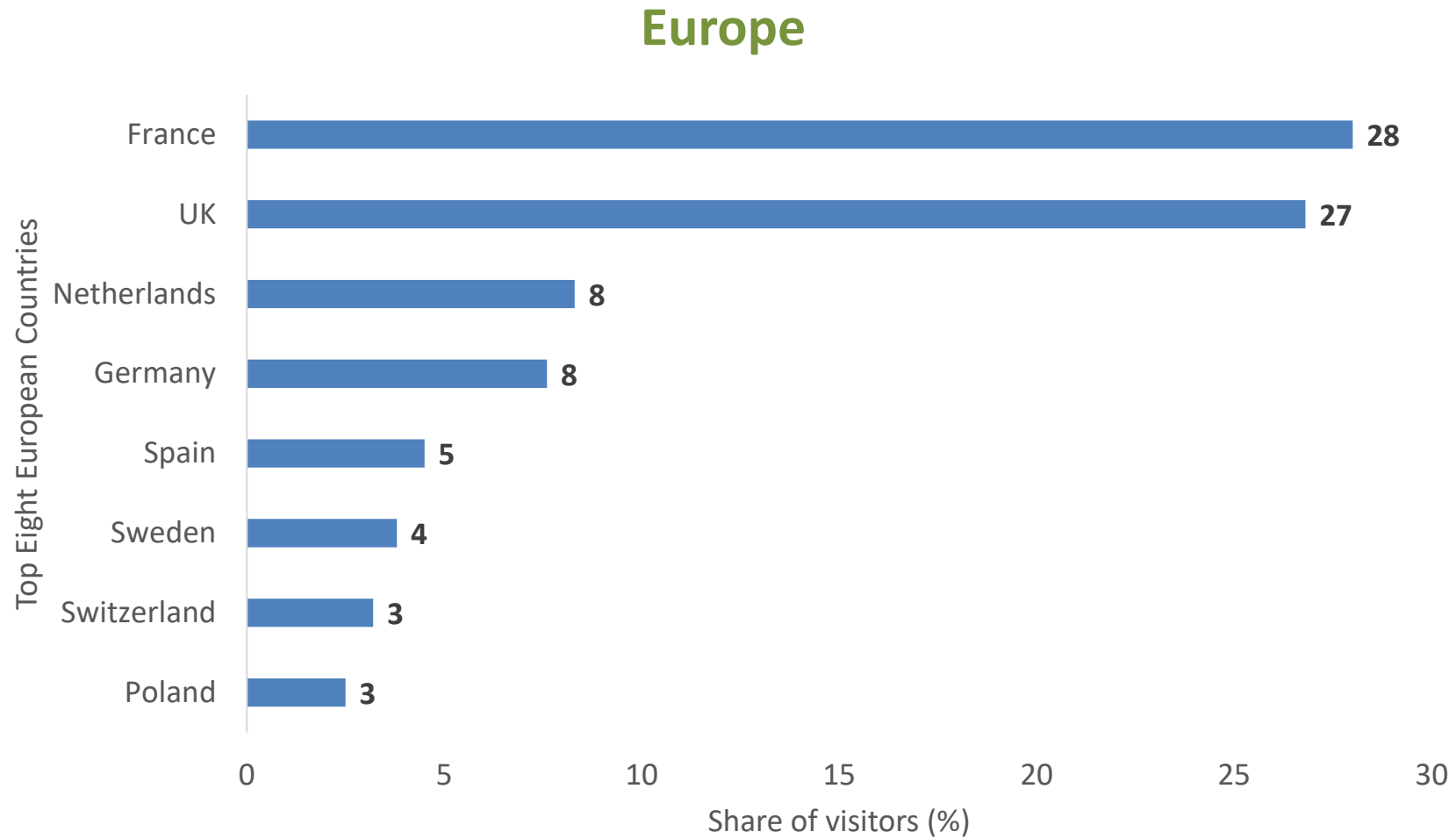
## Long Haul – Region Breakdown

16% of IVS respondents

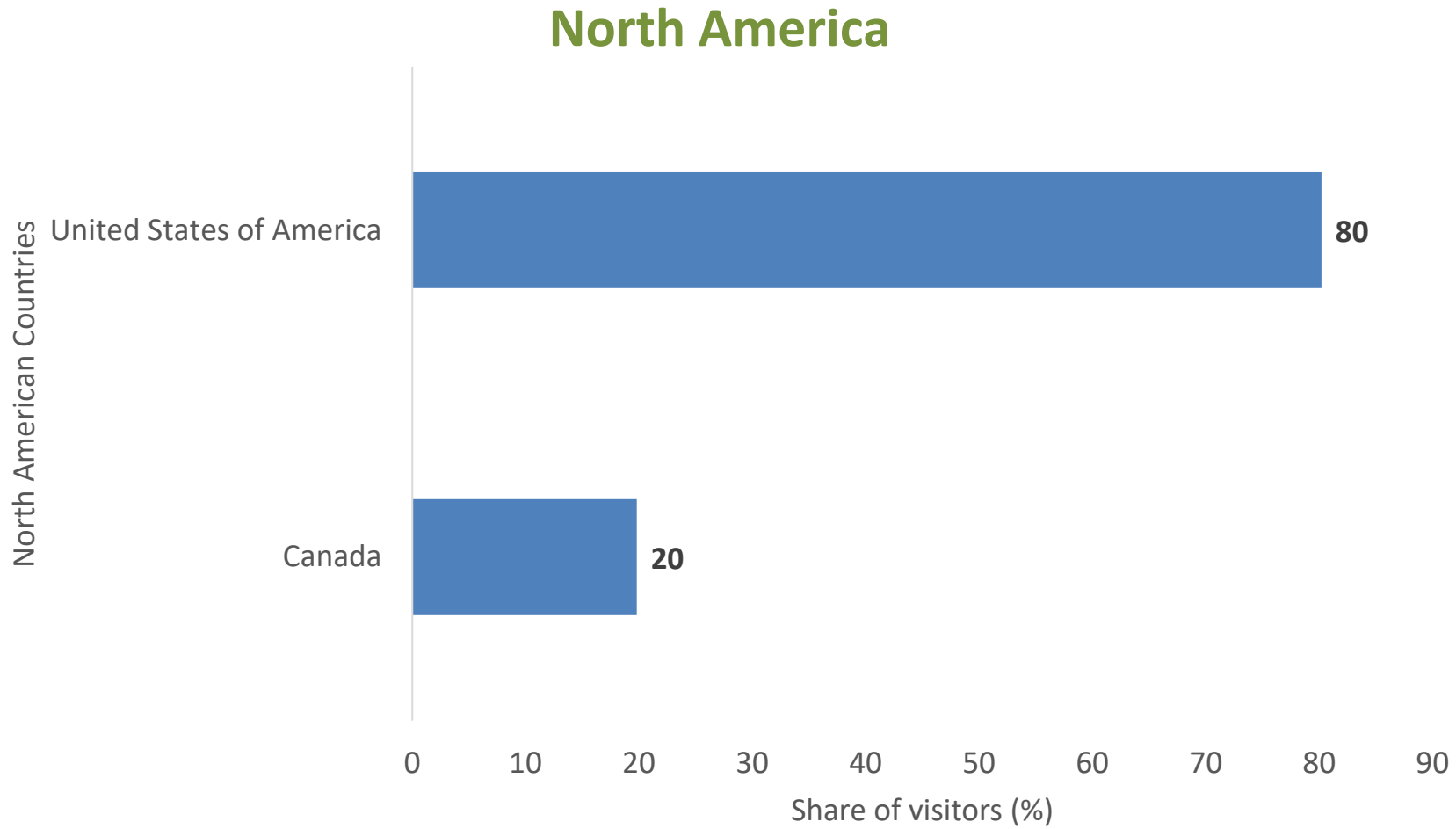




# Long Haul Market – Europe

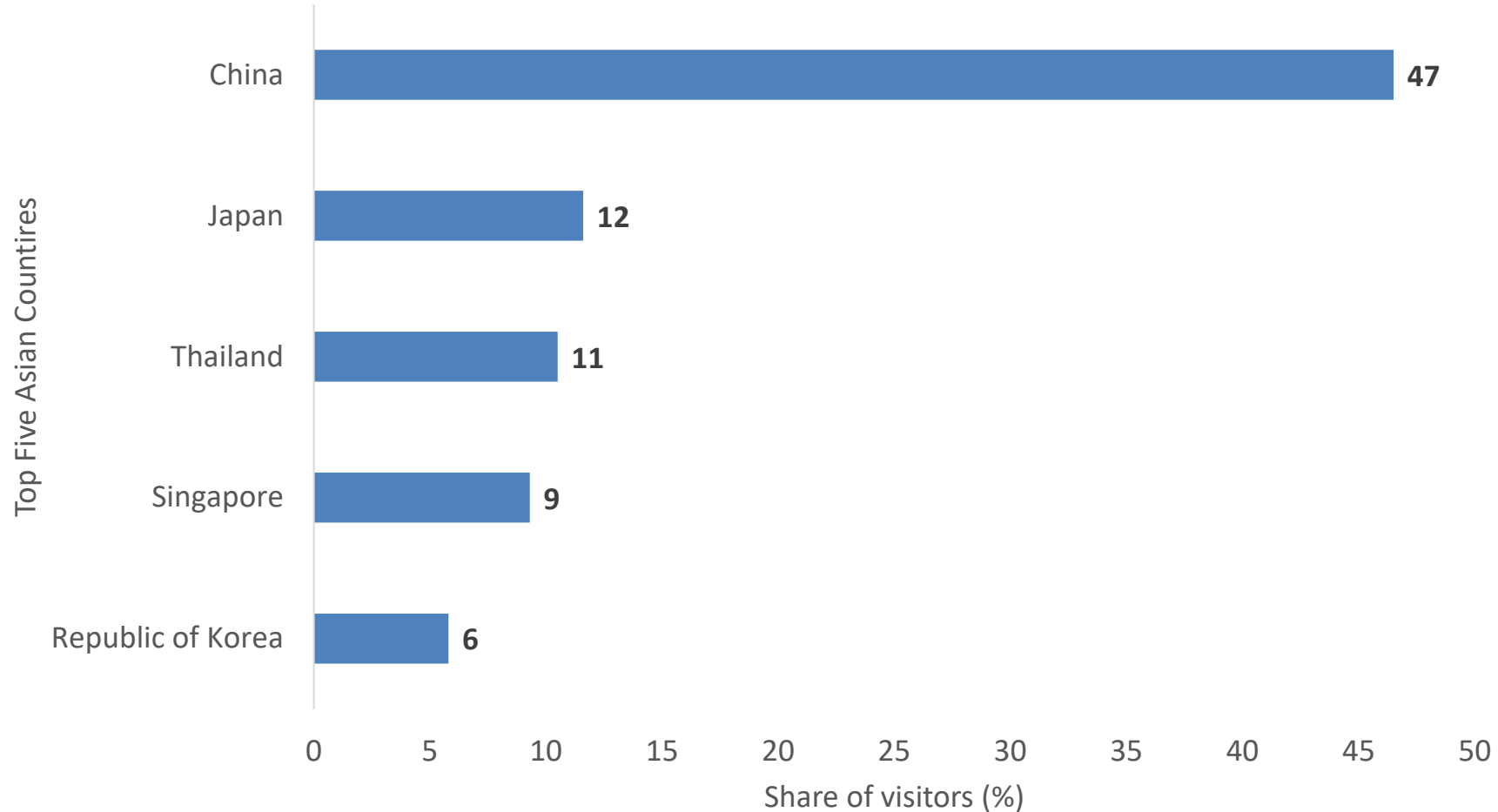


# Long Haul Market – North America

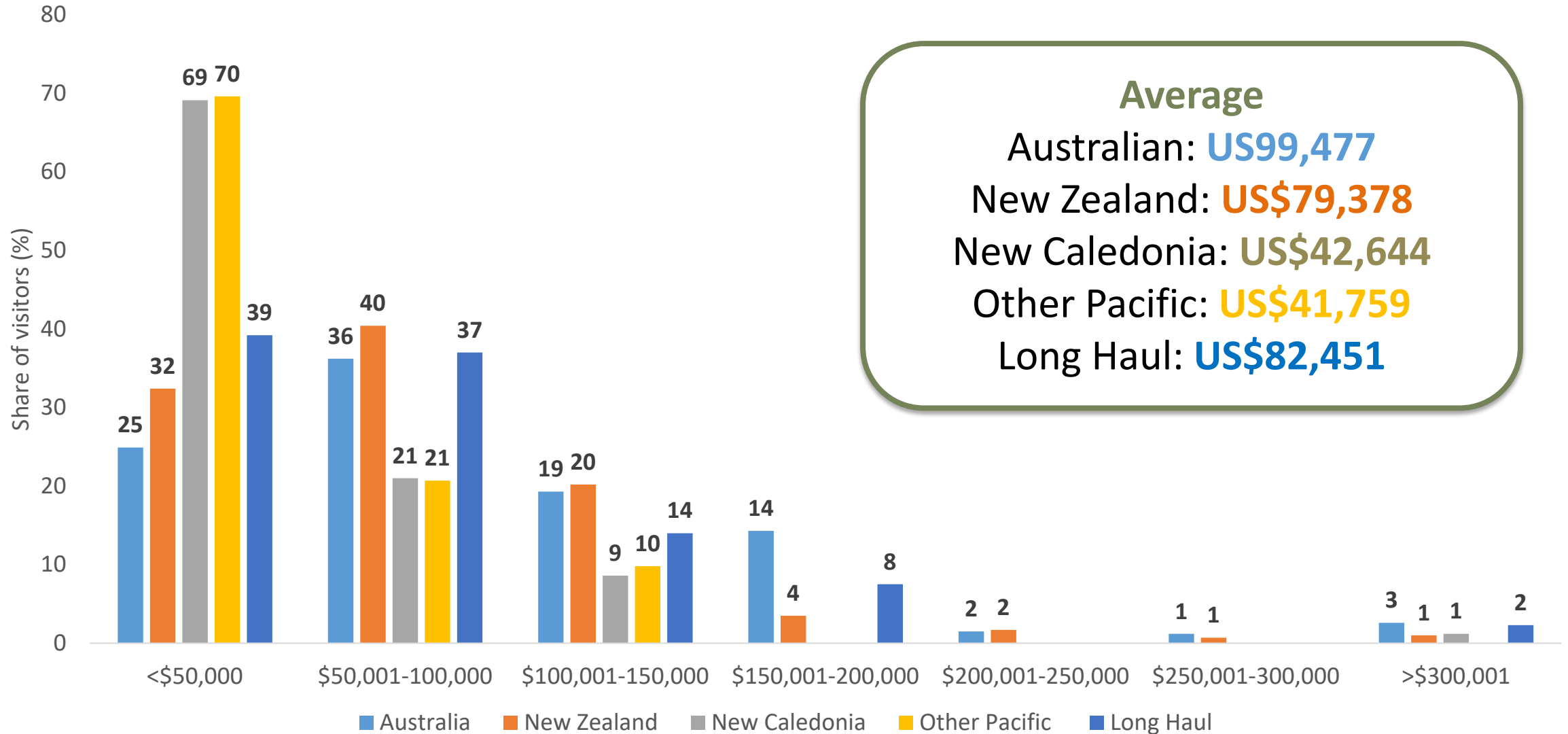


# Long Haul Market – Top Countries

## Asia



# Annual Household Income



# Presentation Structure





# 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 on average  
**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

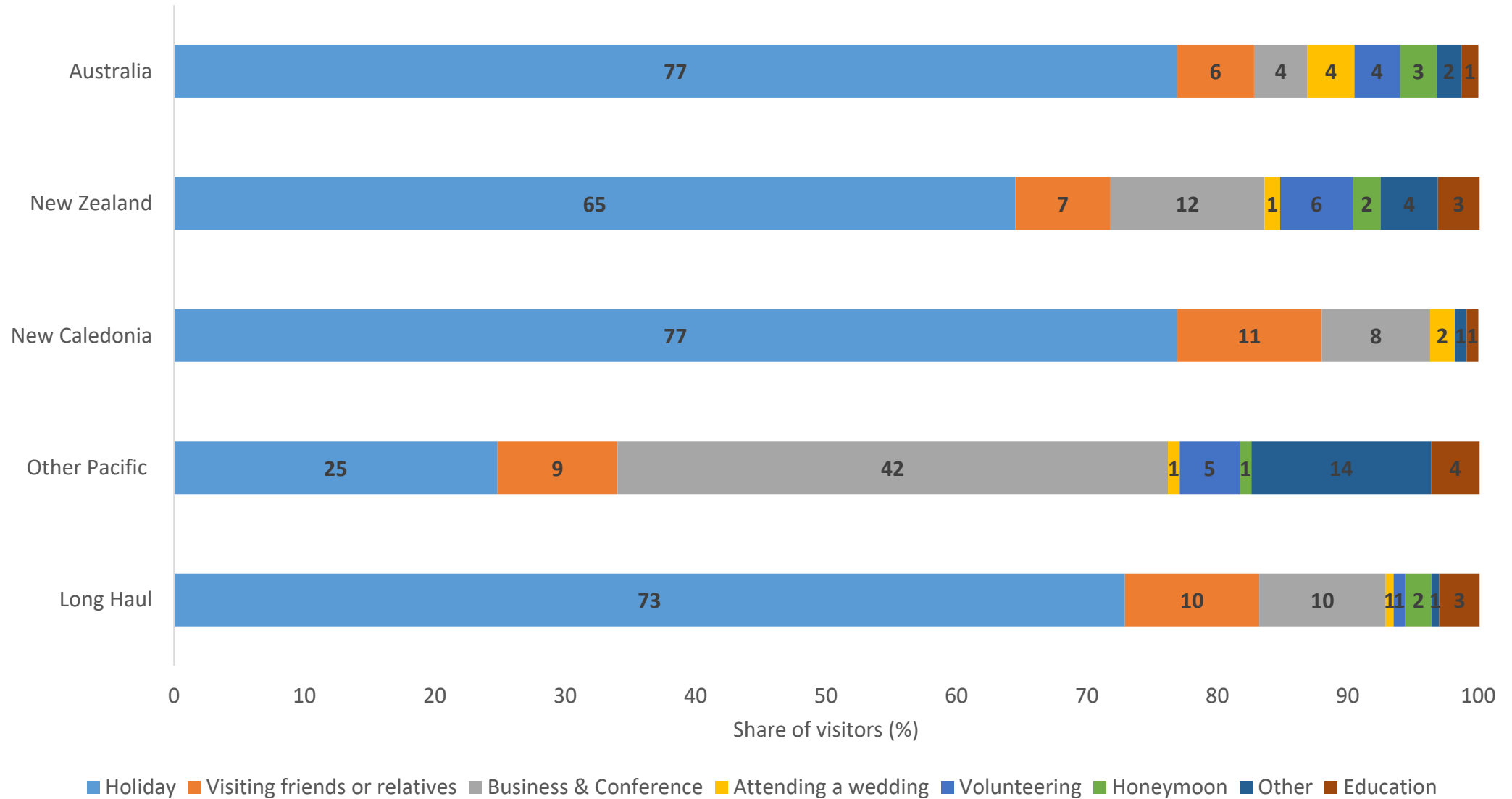
**72%** Holiday  
**9%** Business/Conference  
**8%** Visiting Friends/Family



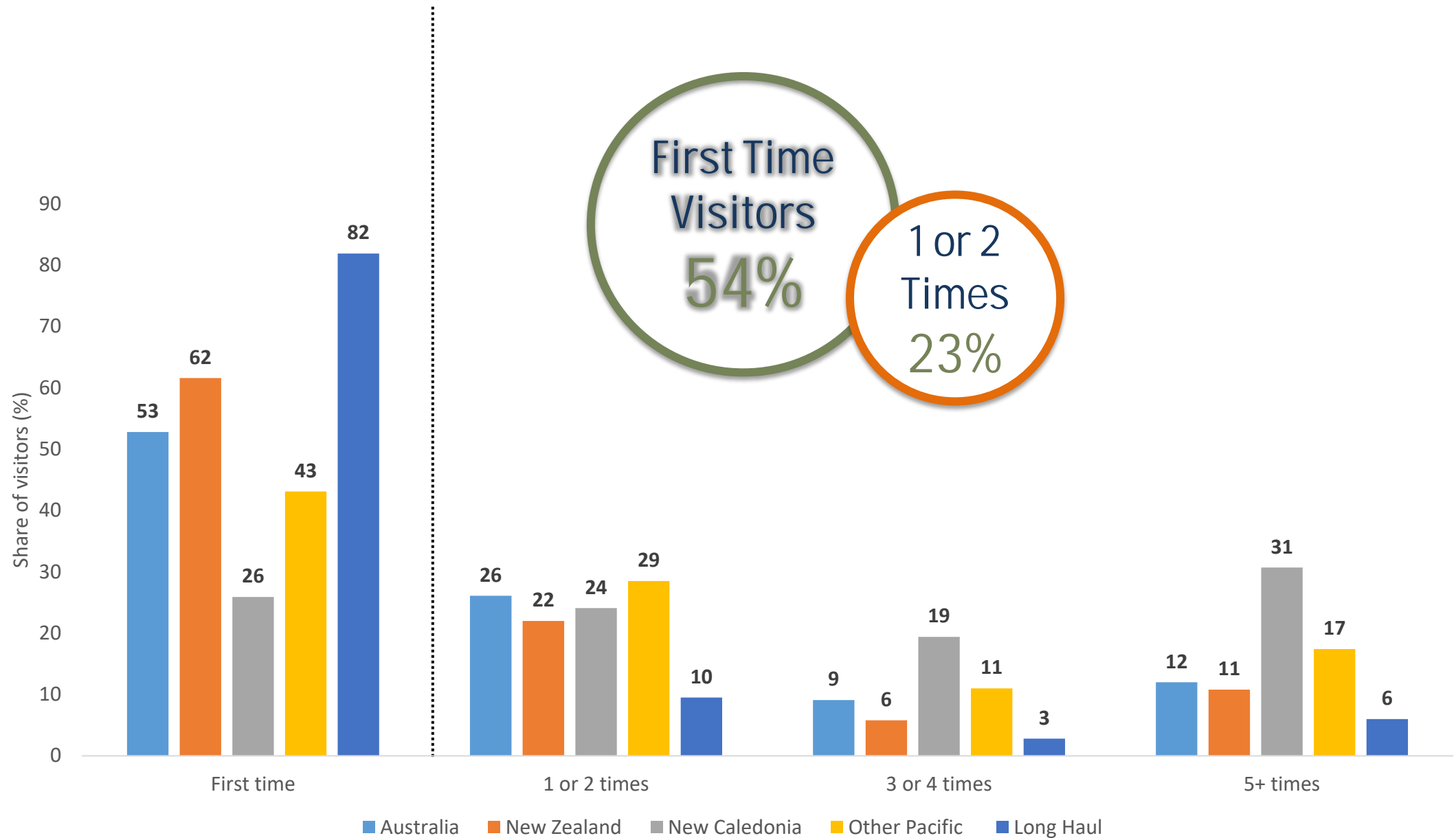
## Islands Visited on Trip

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

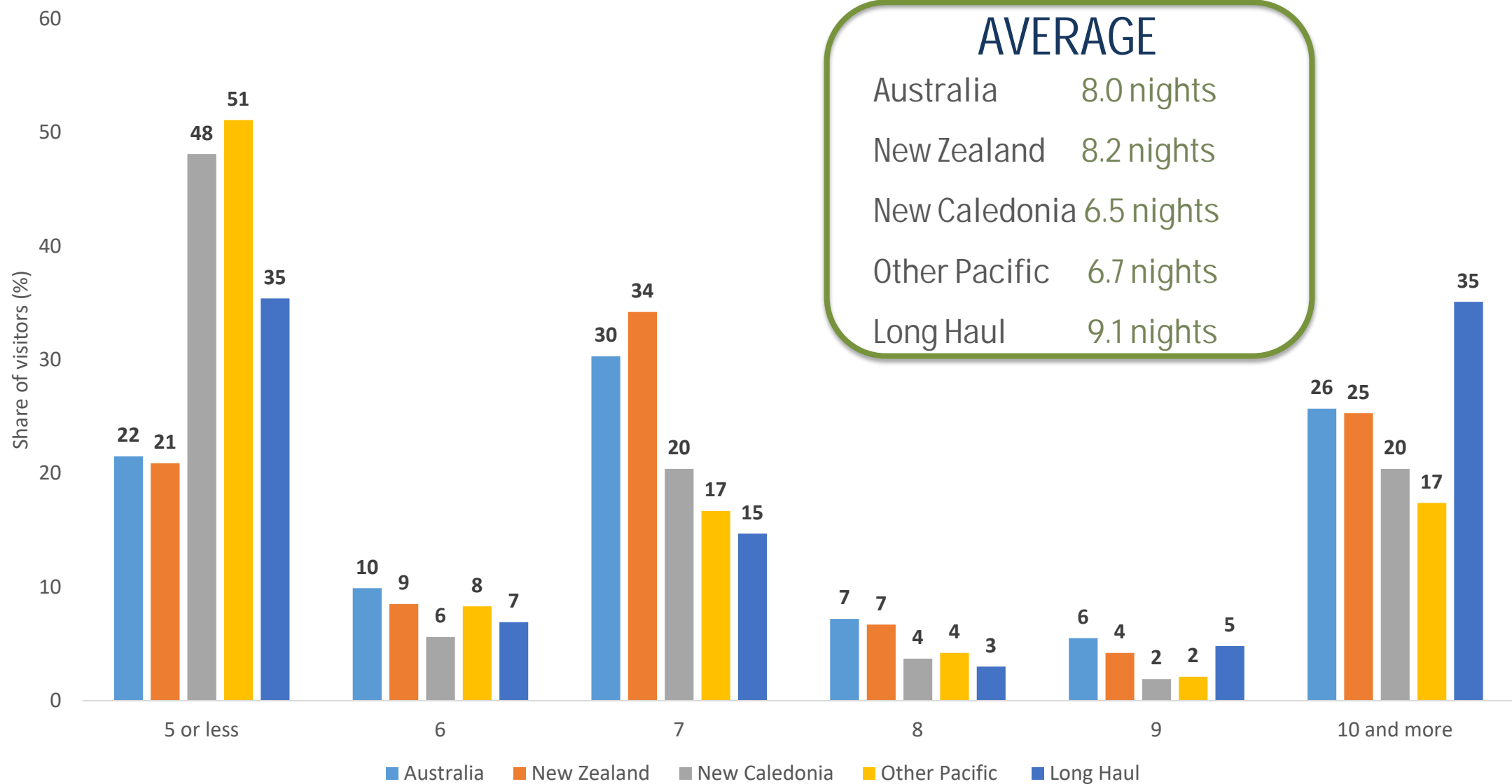
# Main Purpose of Visit



# 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**

55%/55%



australia

23%/25%



**Aircalin**  
Nouvelle-Calédonie

11%/11%



**QANTAS**

11%/10%



8%/5%

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

6%/3%

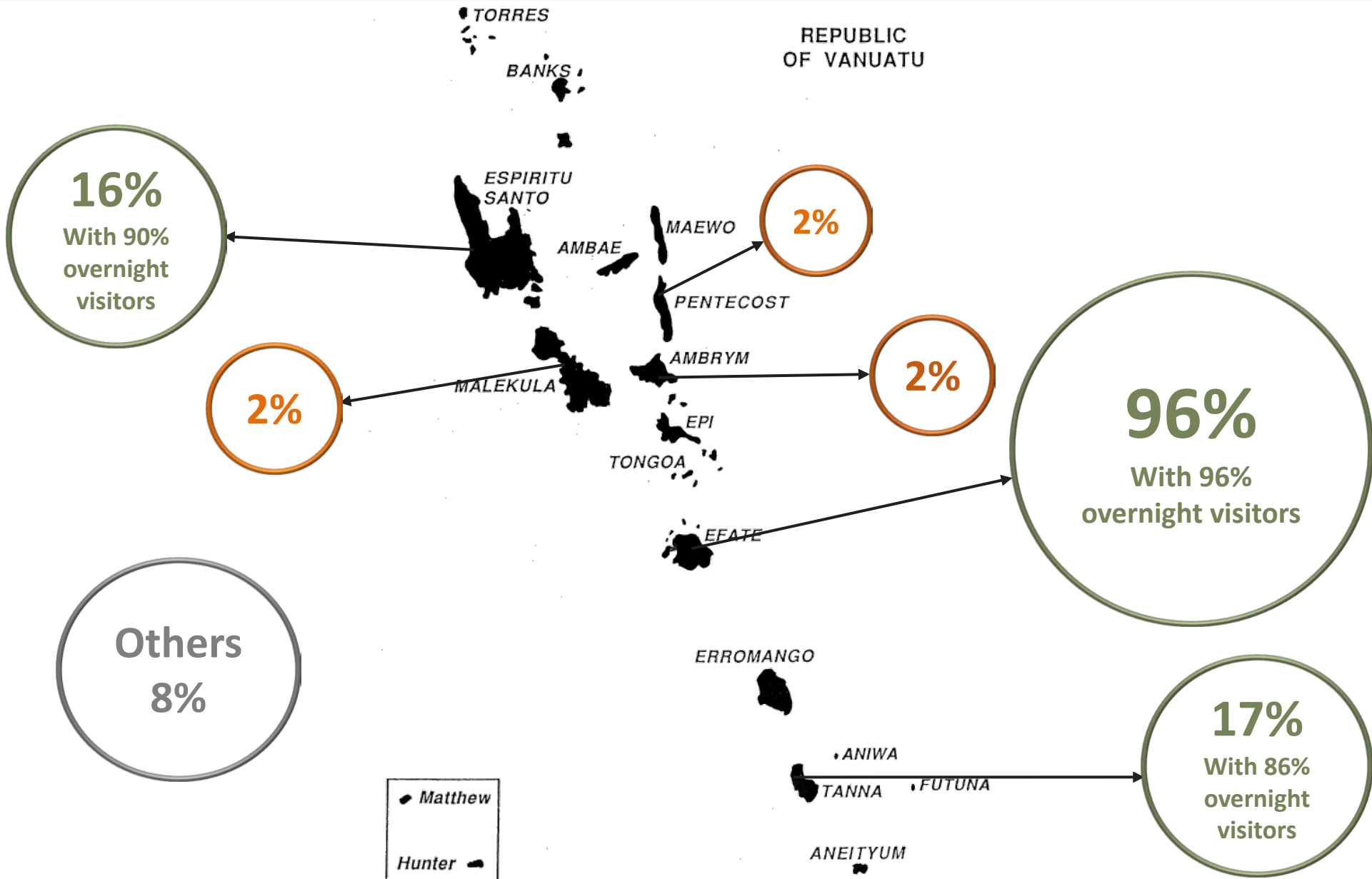


Fiji Airways and  
Aircalin are more  
commonly used  
by visitors from  
Pacific countries

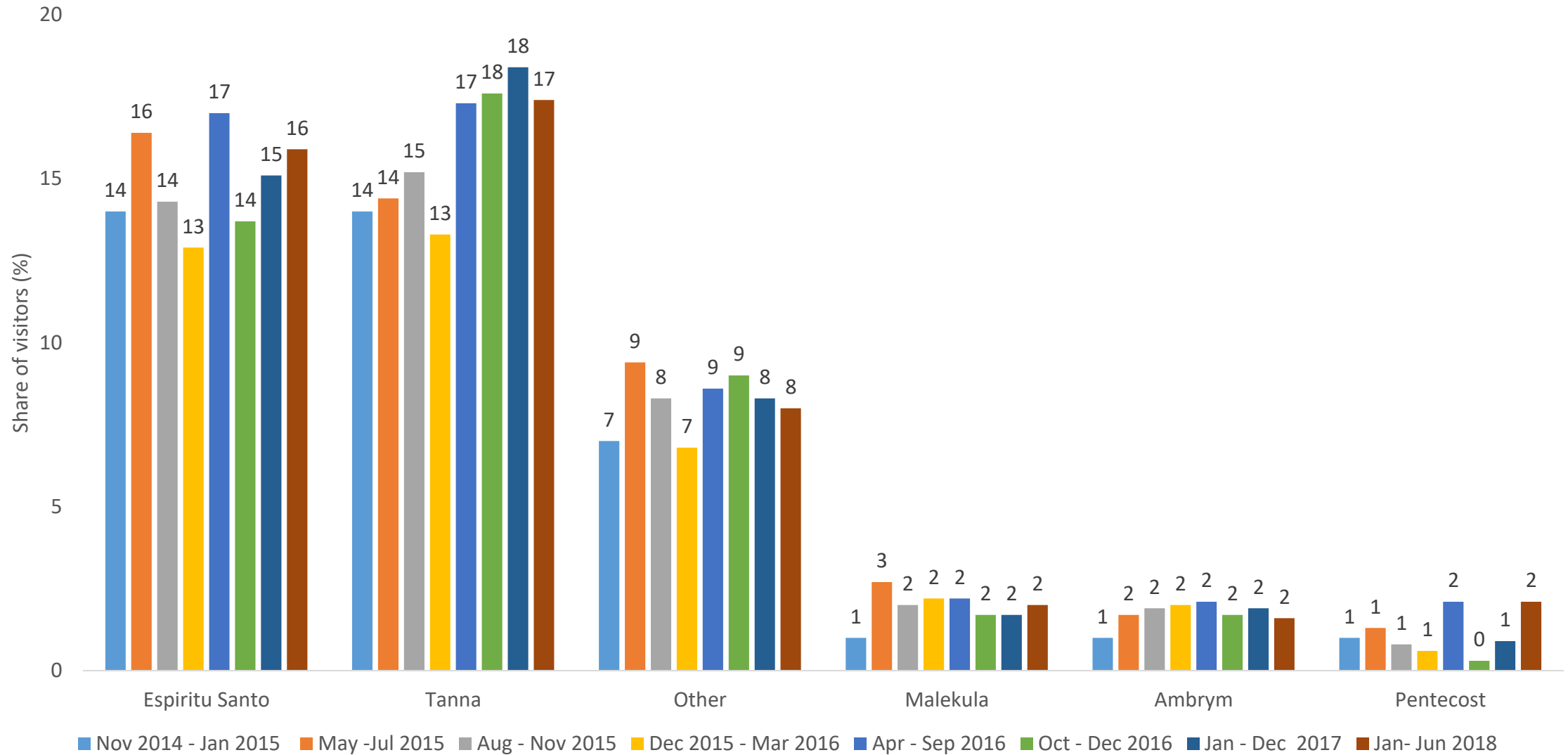
\* Text is grey represents all visitors/green represents 'holiday' only



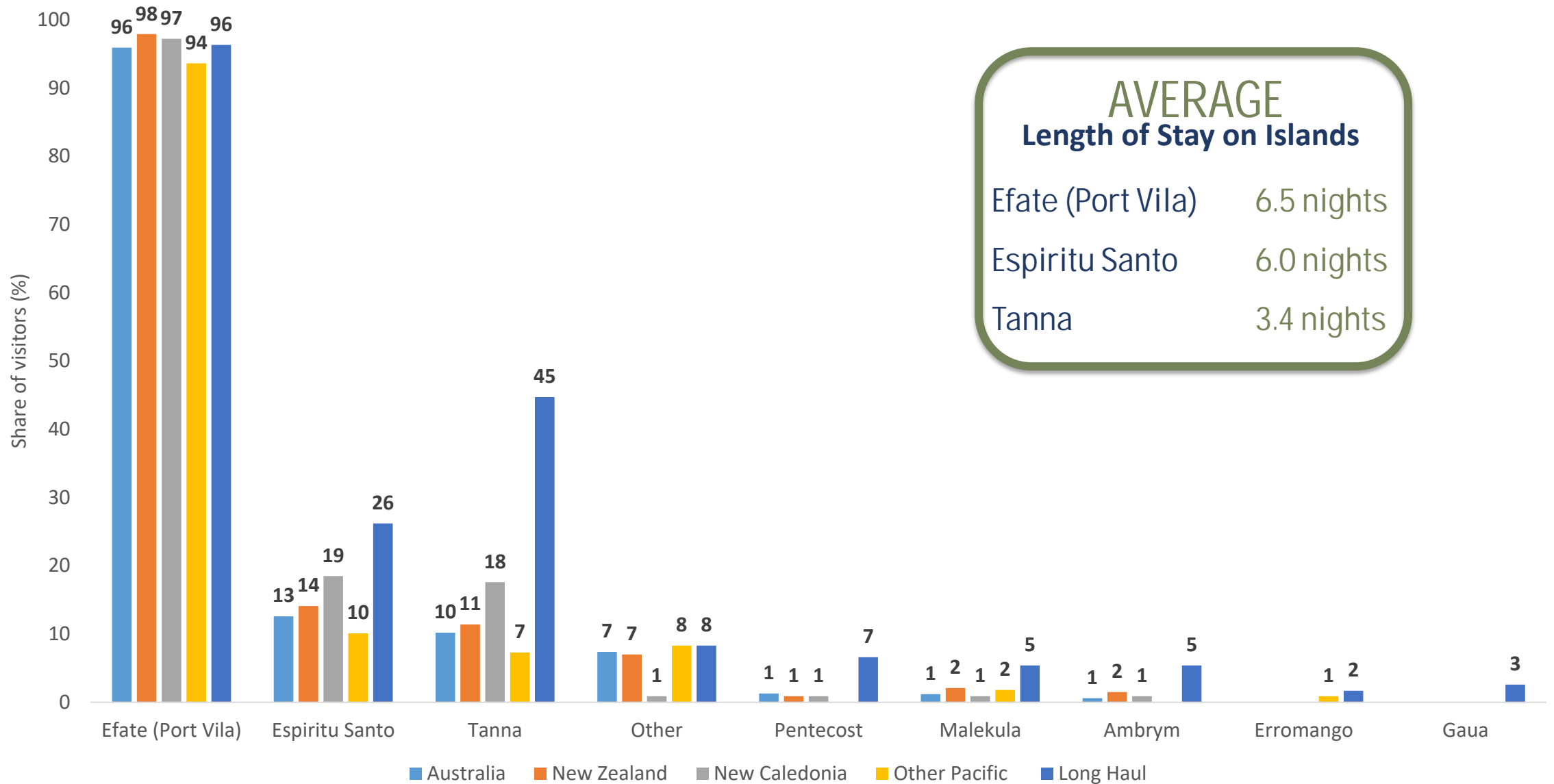
# Islands Visited



# Islands Visited – Time Series



# Outer Islands Visited – Country of Origin



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

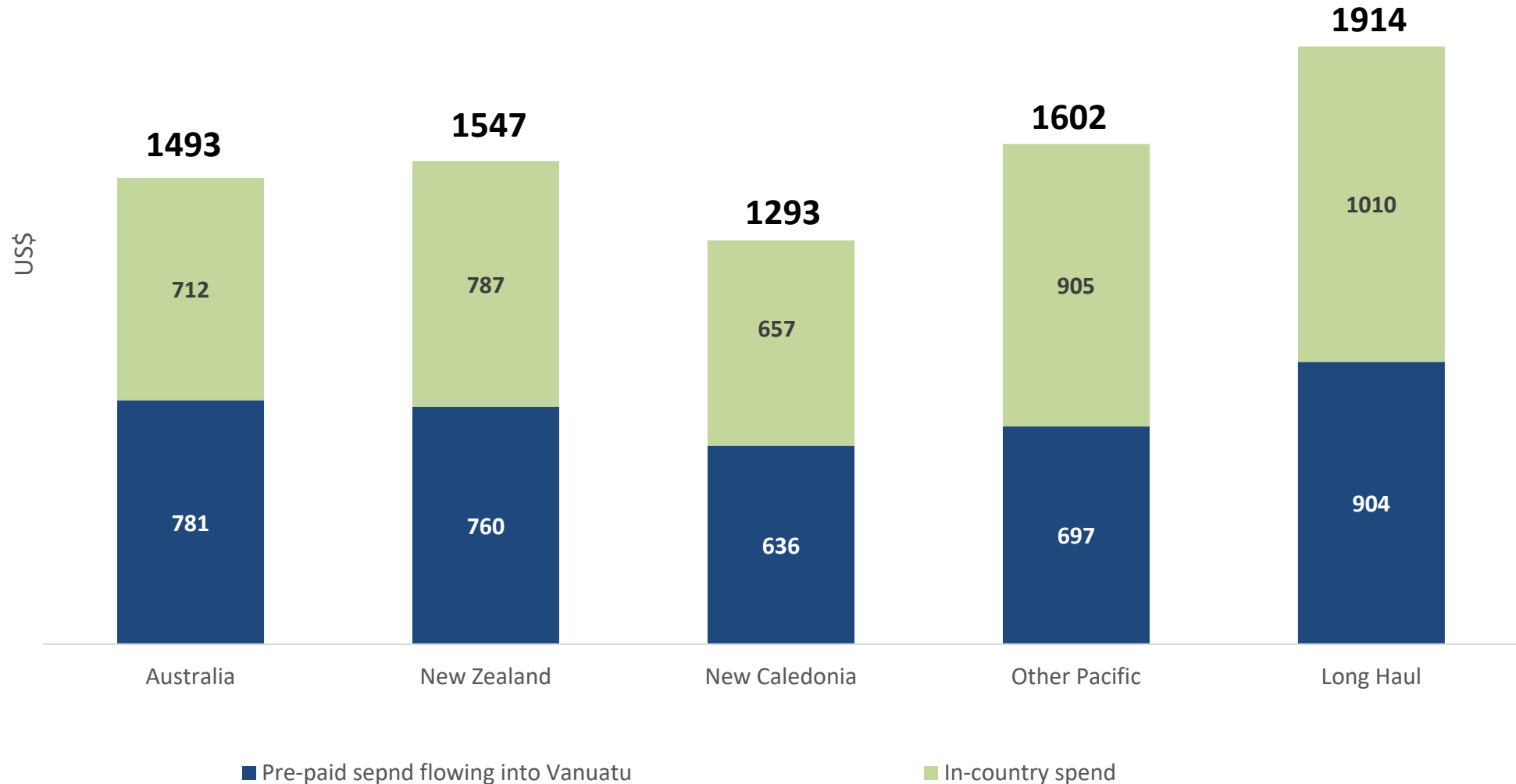
Note: 31+ days as outliers were removed for length of stay analysis

# Presentation Structure



# Expenditure by Market

PER PERSON PER VISIT



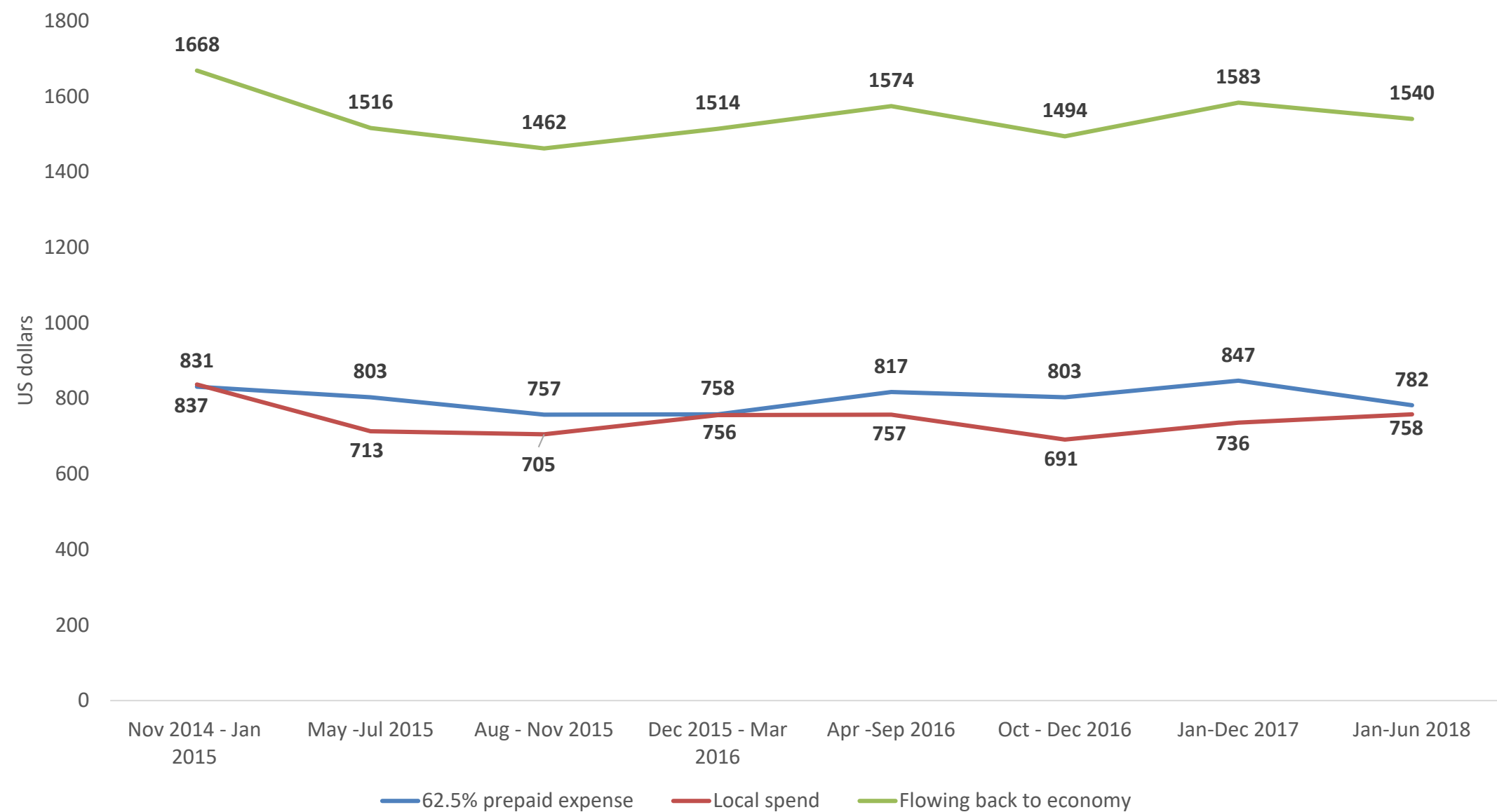
*Note: the high spend for long haul is driven by the higher length of stay.*



# 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>

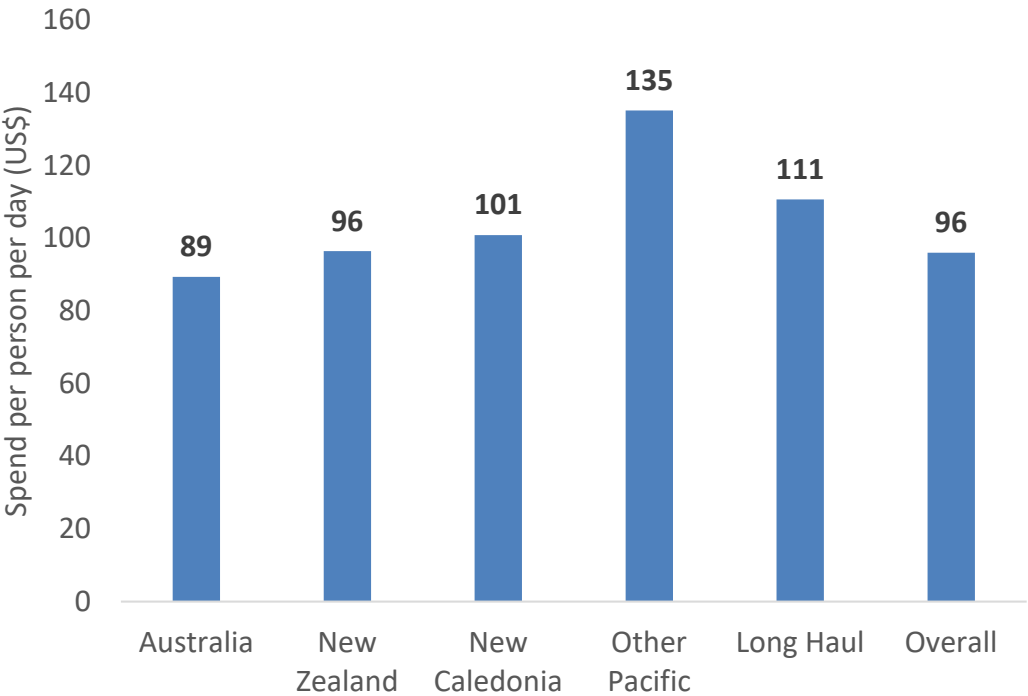
# Overall Visitor Spend Time Series Trends



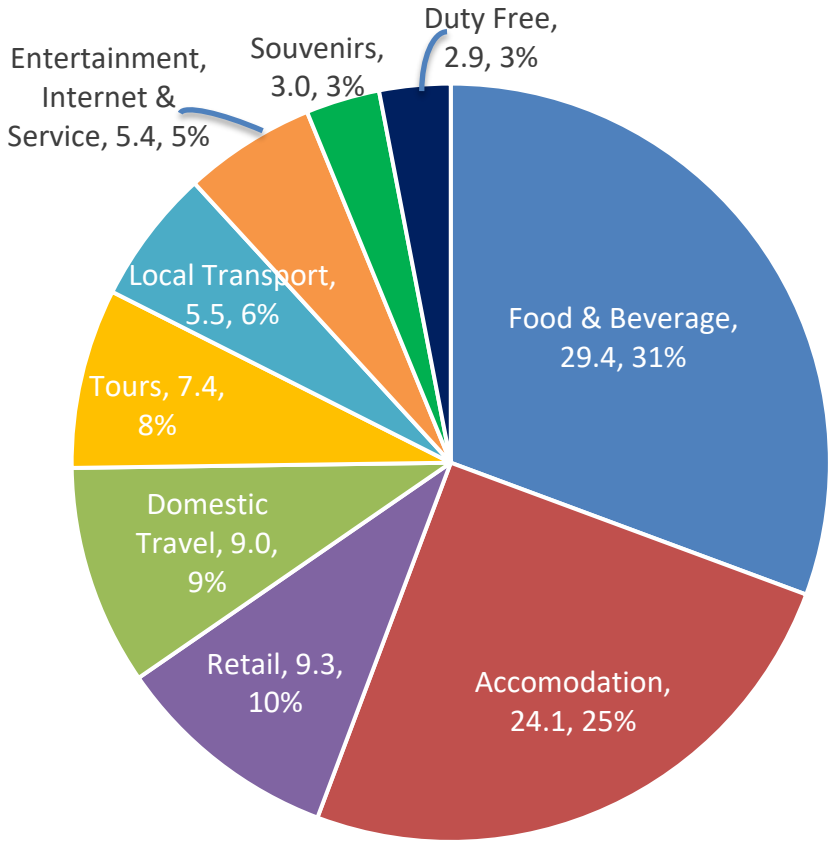
# Average Spend while in Vanuatu per day

## PER PERSON PER DAY

### By Market

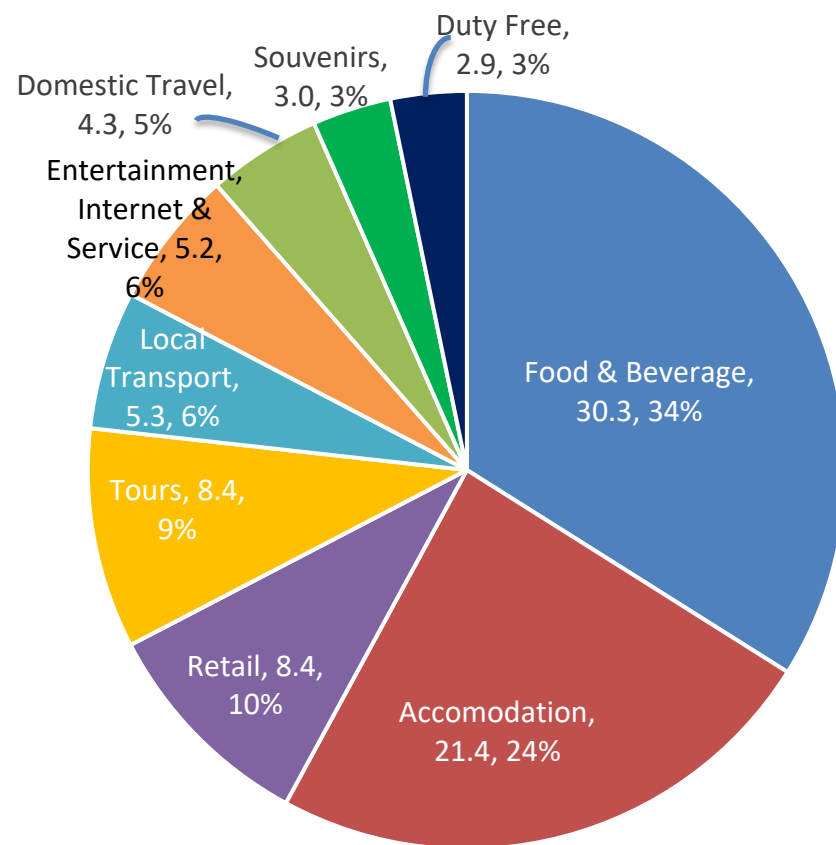


### Overall - \$96 per day

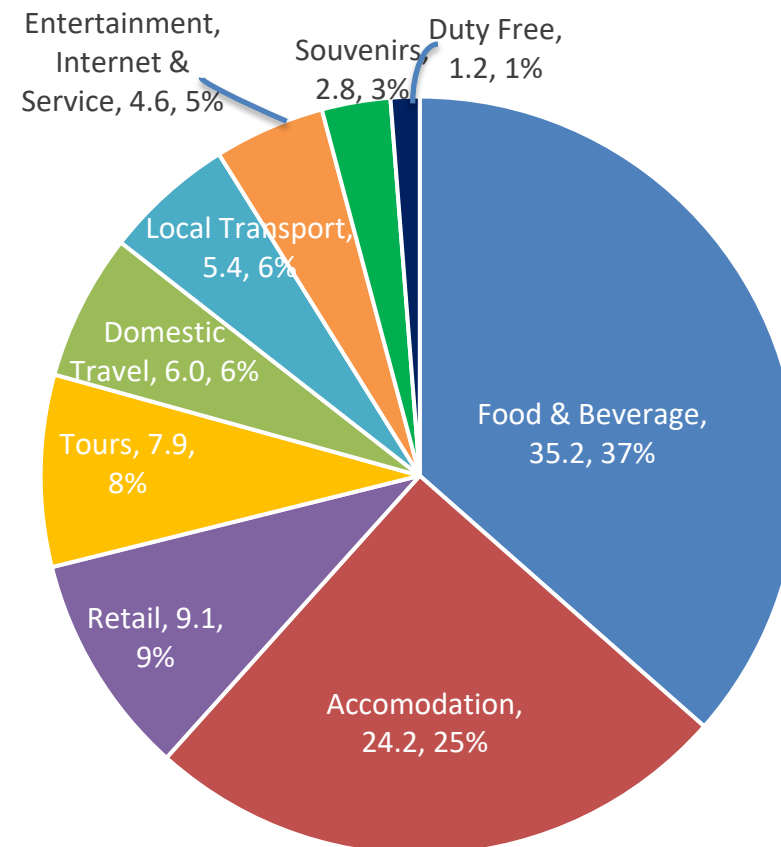


# Average Spend while in Vanuatu by Market

## Australia - \$89 per day

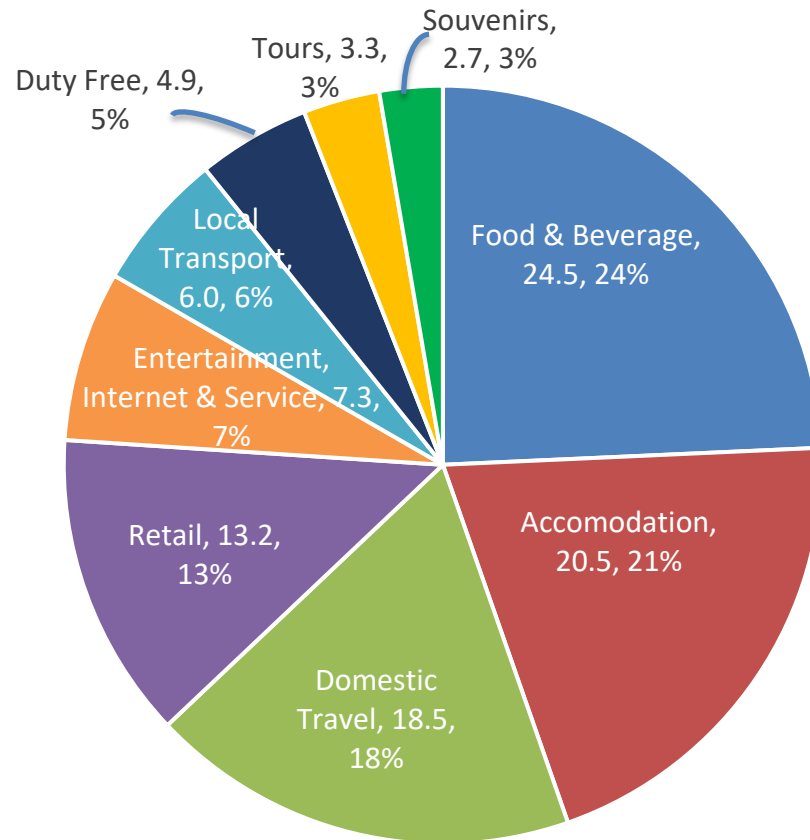


## New Zealand - \$96 per day

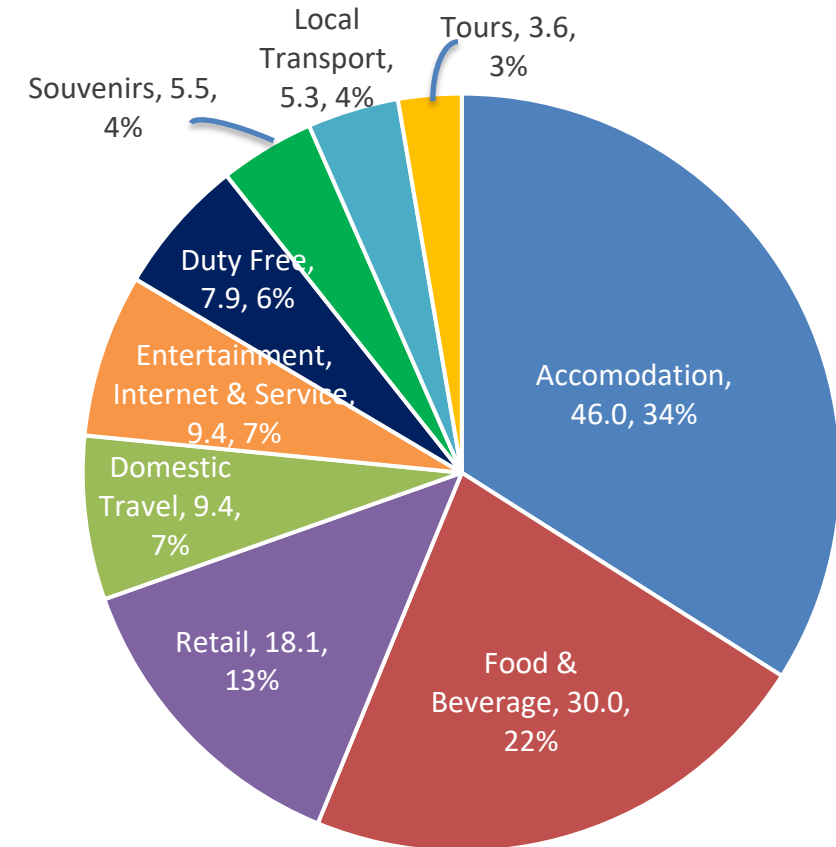


# Average Spend while in Vanuatu by Market

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

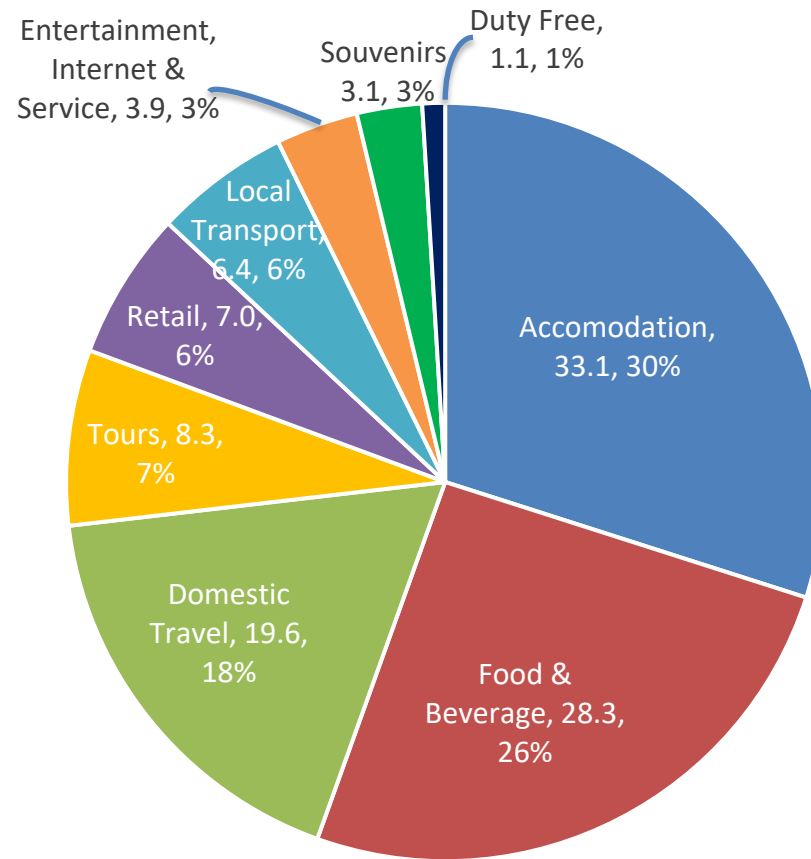


**Other Pacific - \$135 per day**



# Average Spend while in Vanuatu by Market

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



# 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

# Presentation Structure





# Information Sources and Decision Making

## How did you find out about Vanuatu?



41%	Friends and Family
36%	Previous Visits
19%	Google

## What influenced your decision making?



3.8/5 Quiet and relaxing atmosphere



3.8/5 Experience a different culture



3.5/5 Beaches and swimming

## How did you purchase your travel?



36%	Direct with airlines and/ or accommodation places
29%	Through a travel booking website
22%	Through a travel agent store
10%	Travel arrangements were made by others
2%	Other



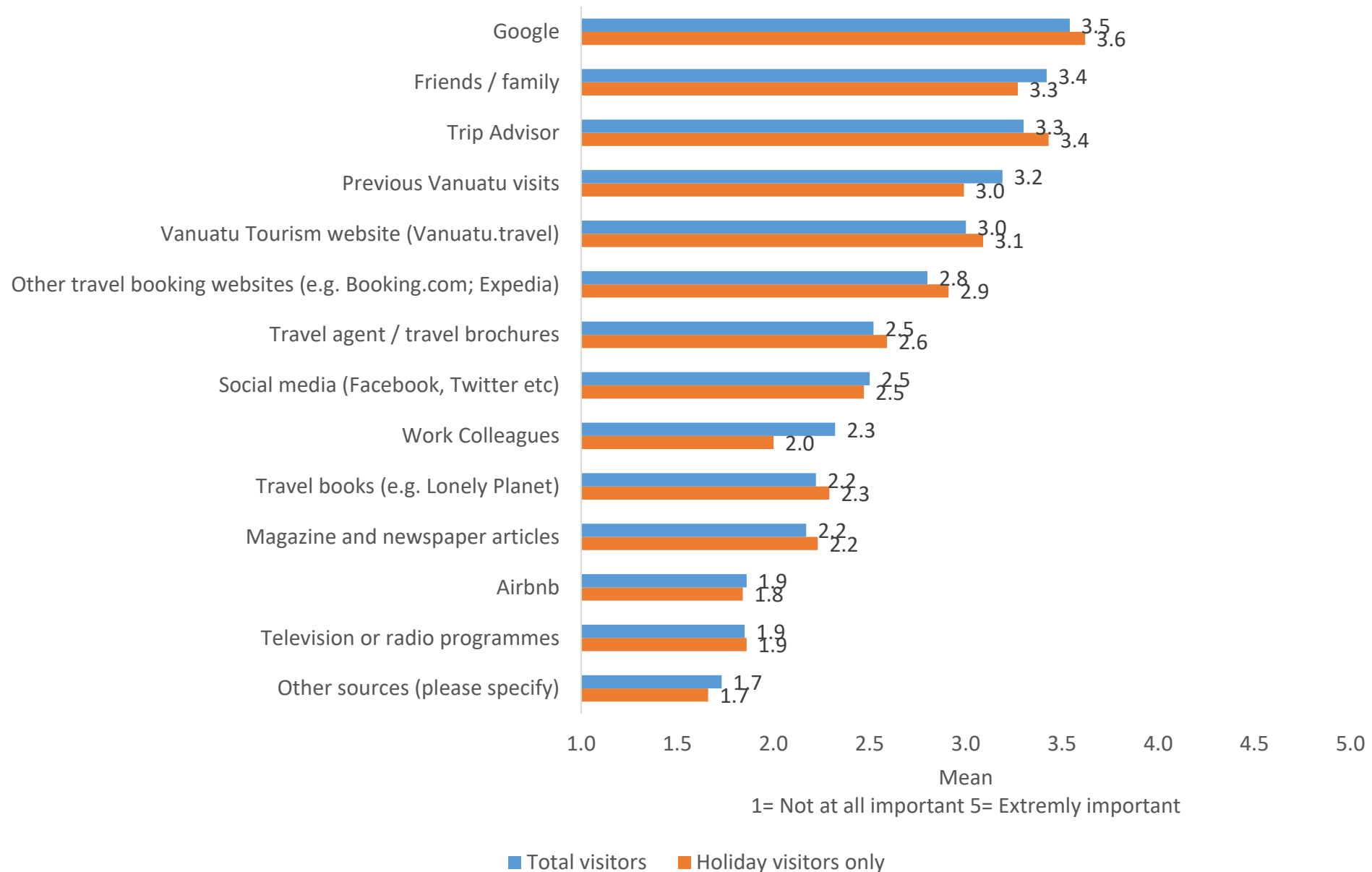
## Importance of information Sources for Planning

3.5/5	Google
3.4/5	Friends and Family
3.3/5	Trip Advisor
3.2/5	Previous Visits

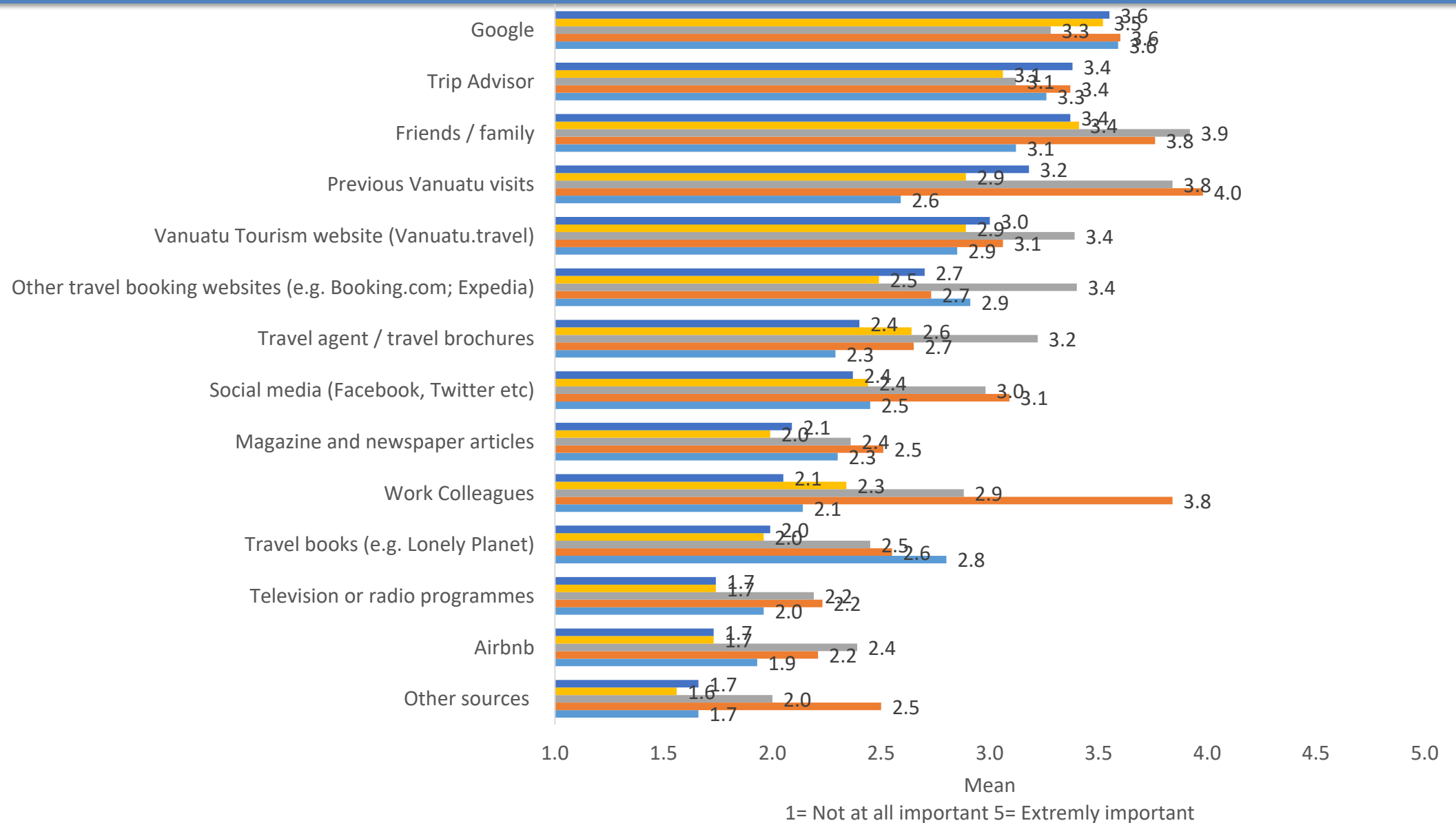
# Influences on the decision to choose Vanuatu

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

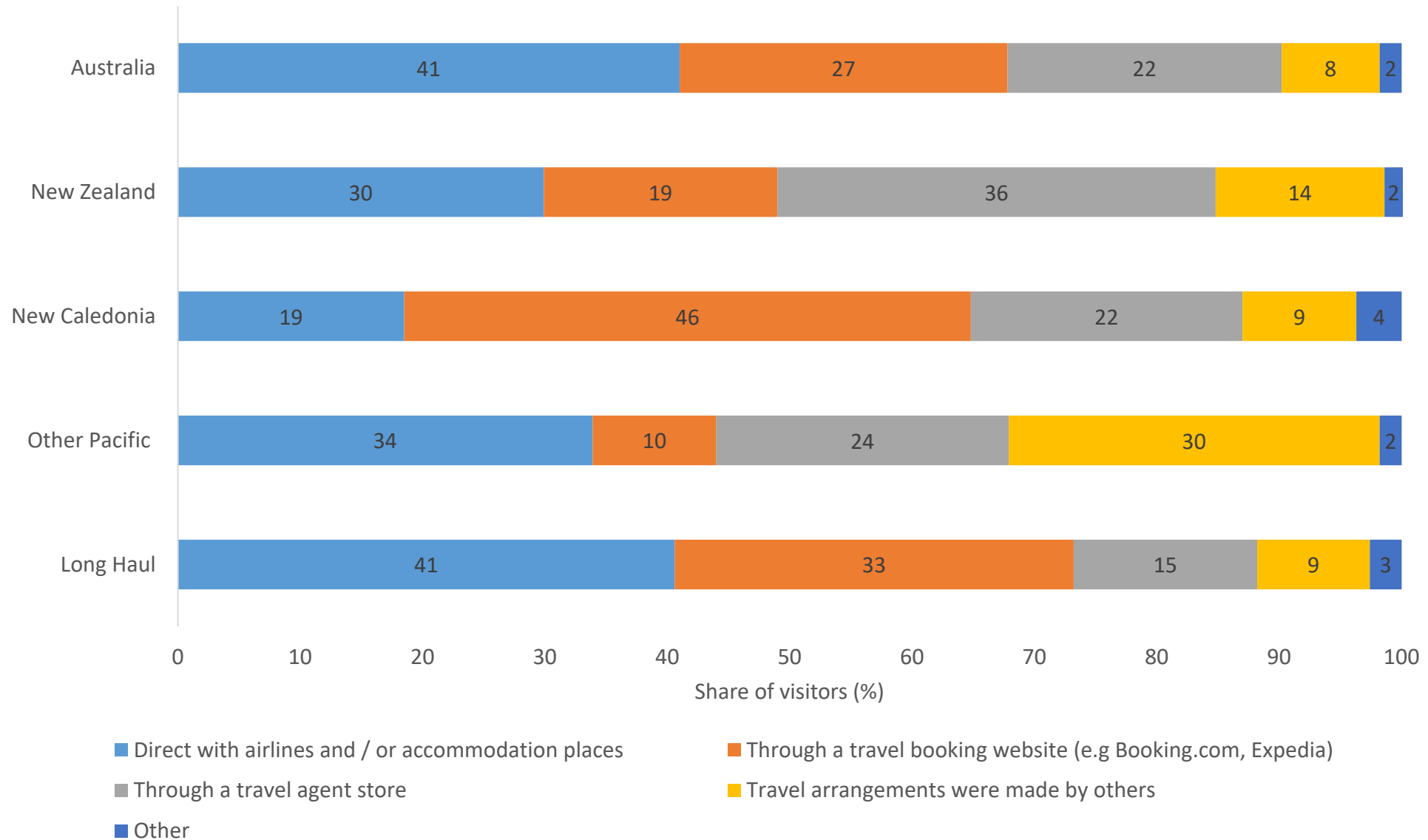
# Importance of Sources Used for Planning – Holiday



# Importance of Sources Used for Planning – Market

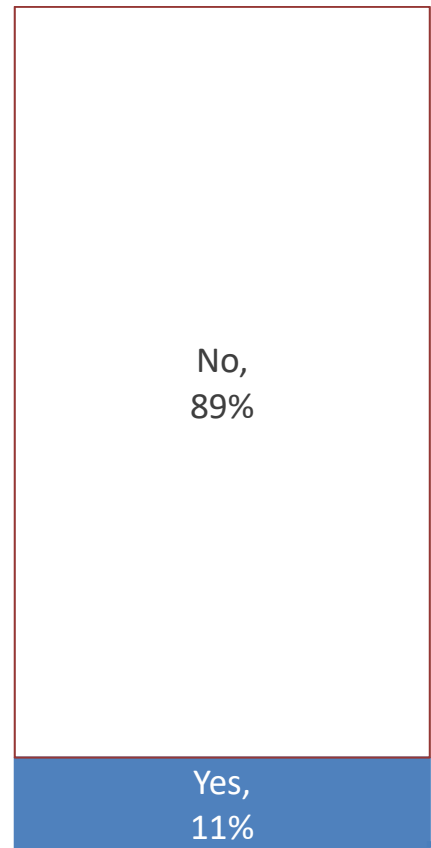


# Travel Purchasing Behaviour by Market

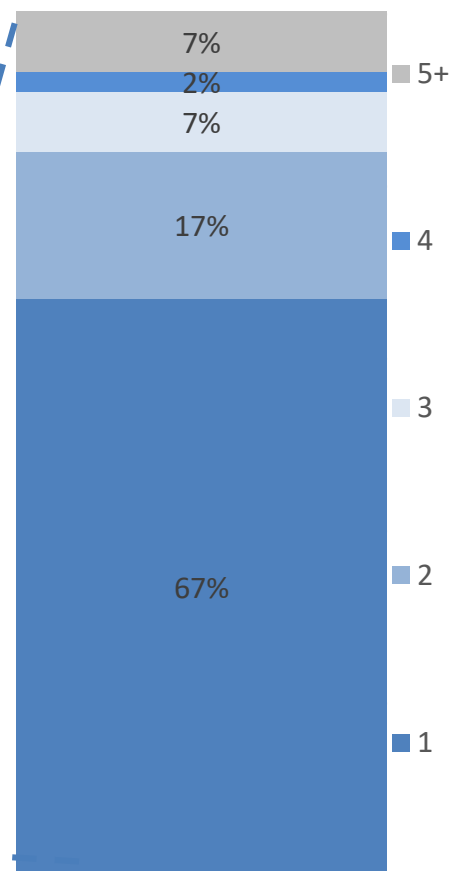


# Cruise visits to Vanuatu for holiday visitors only

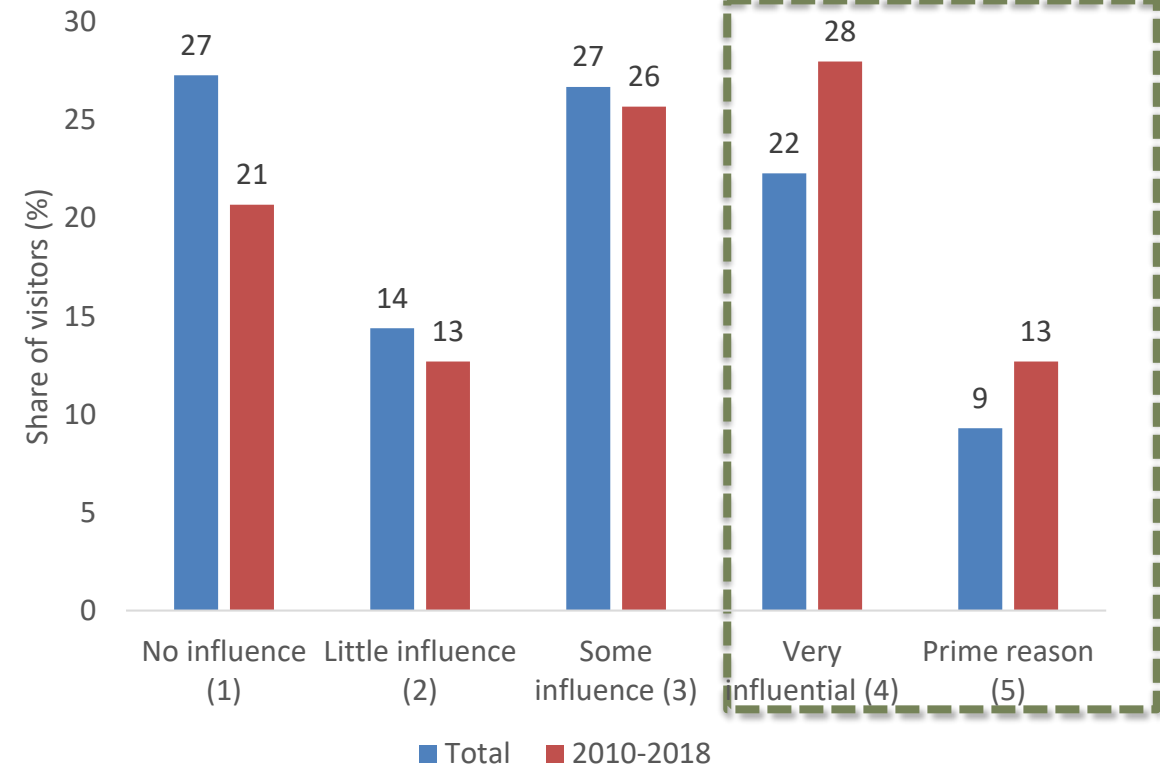
Been on a cruise to Vanuatu before?



If Yes, how many times?



Did cruising before influence your decision to come back?



# Presentation Structure



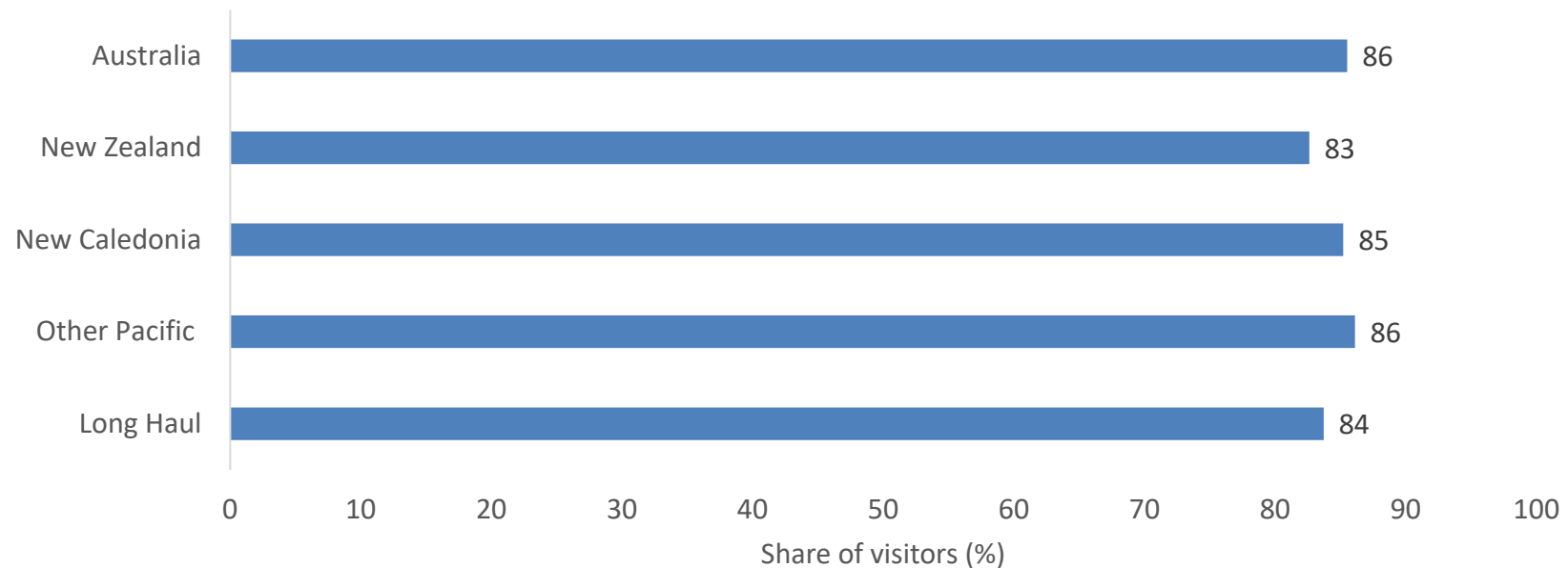
# Visitor Satisfaction

## Overall Satisfaction\*

**85%** Total visitors satisfied

**85%** Holiday visitors satisfied

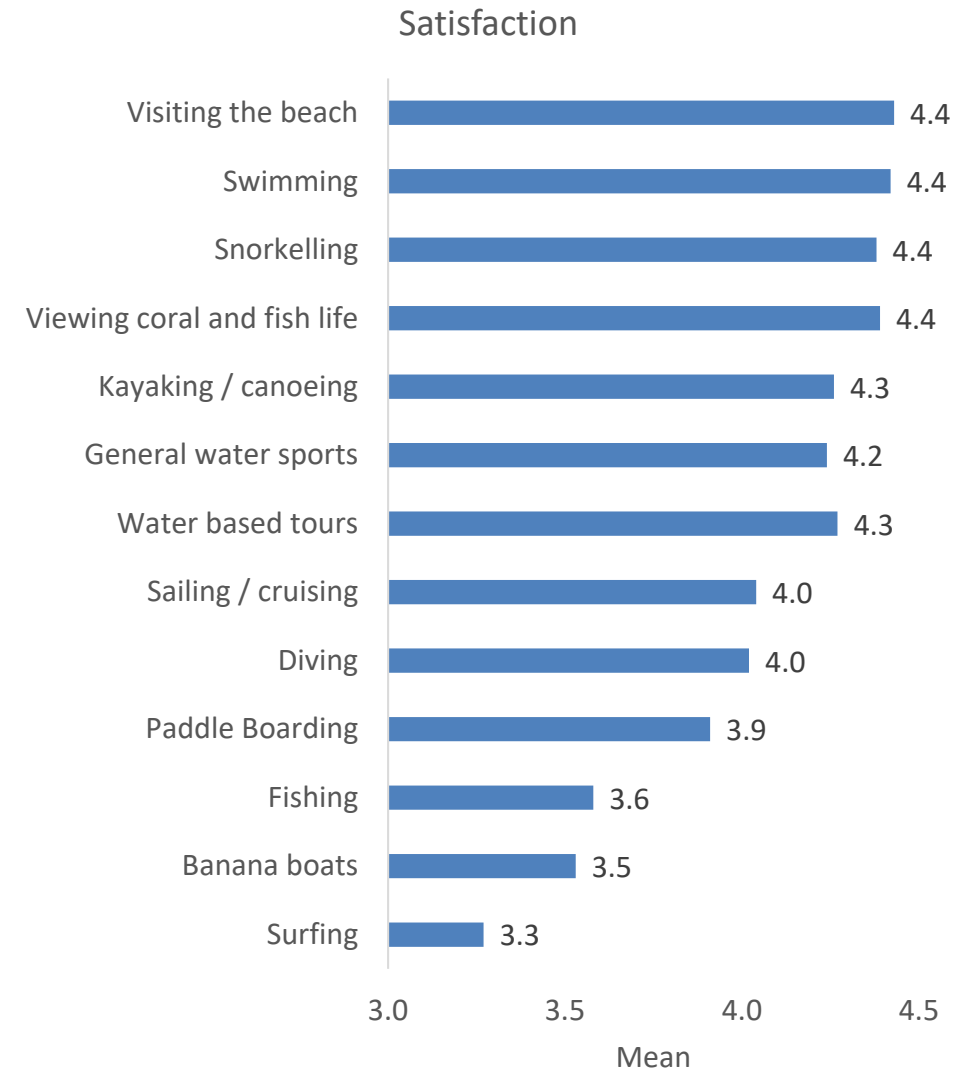
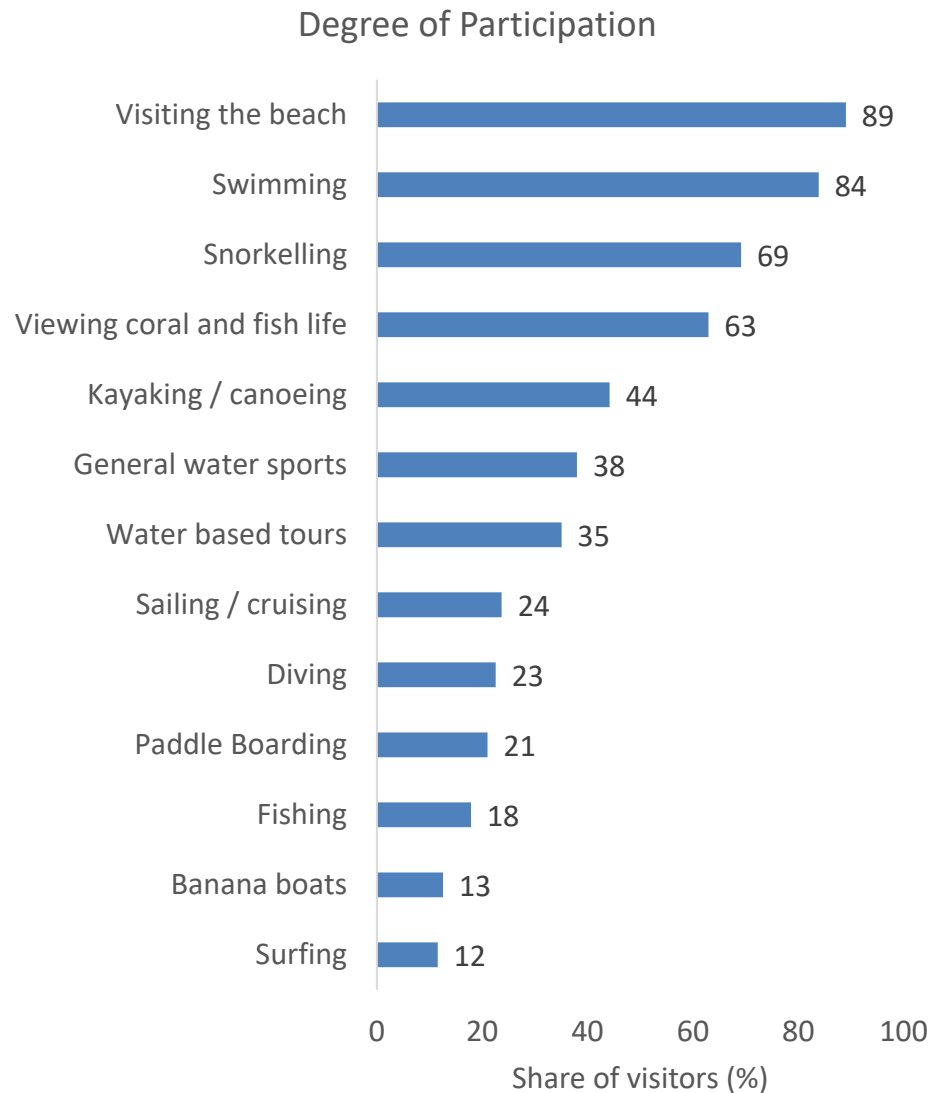
### Satisfaction by Market



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



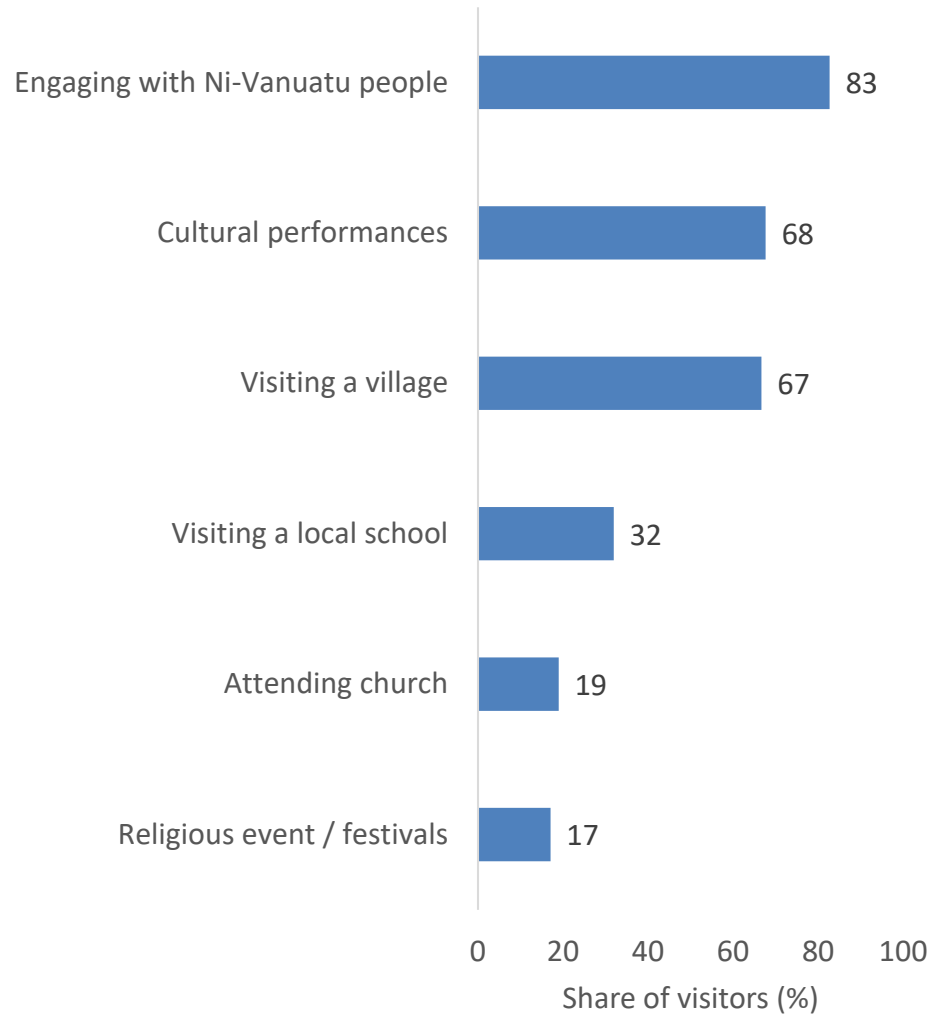
# Water Based Activities



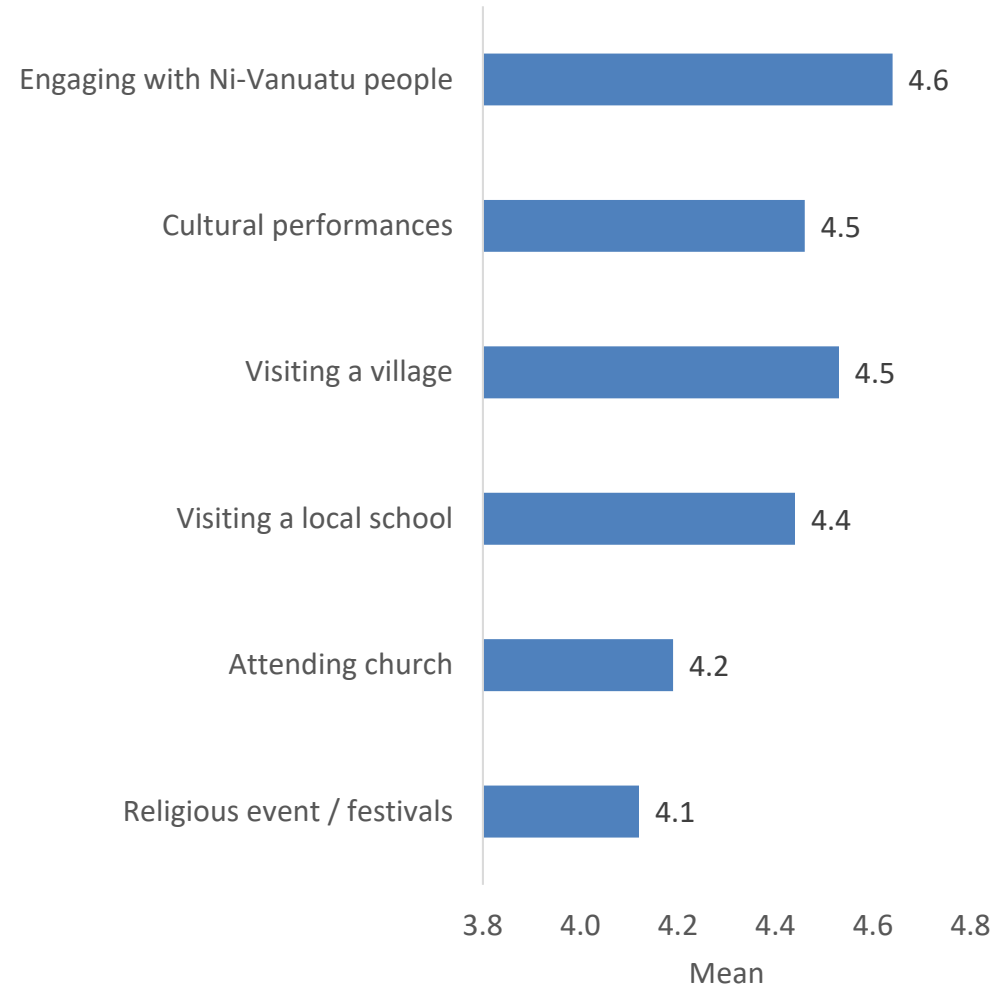
*Note: Multiple responses, therefore total does not add up to 100%*

# Cultural Interaction Activities

Degree of Participation

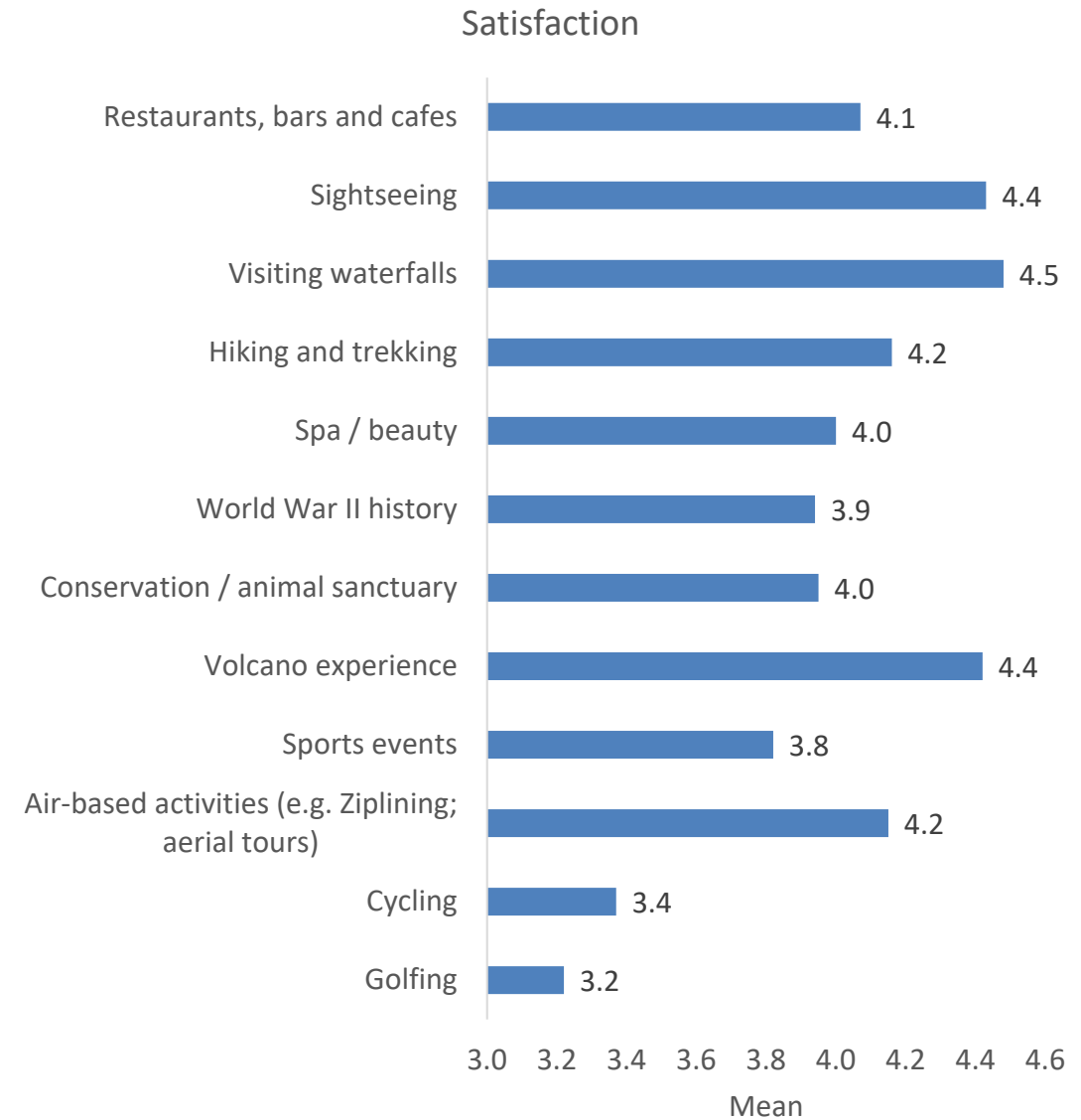
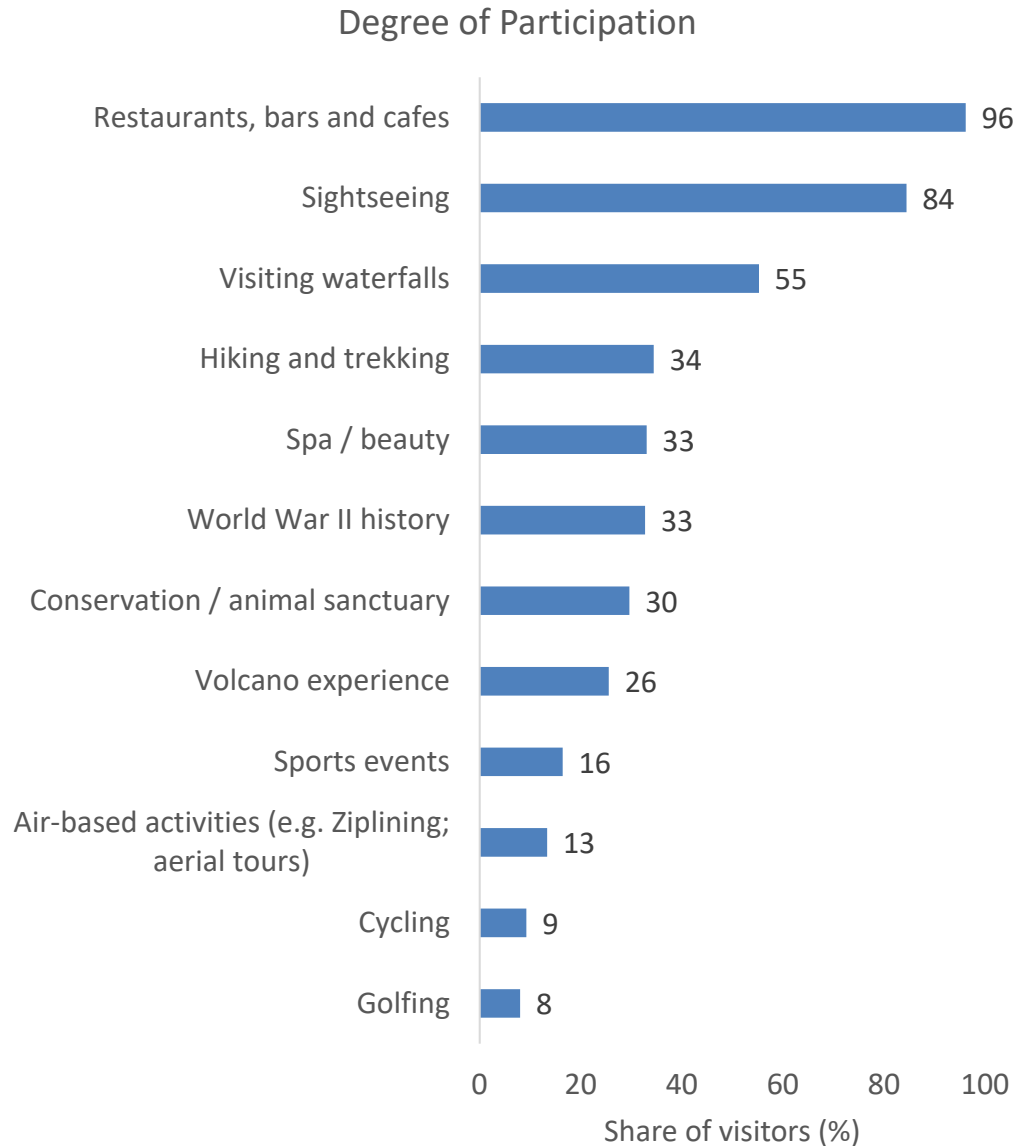


Satisfaction



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

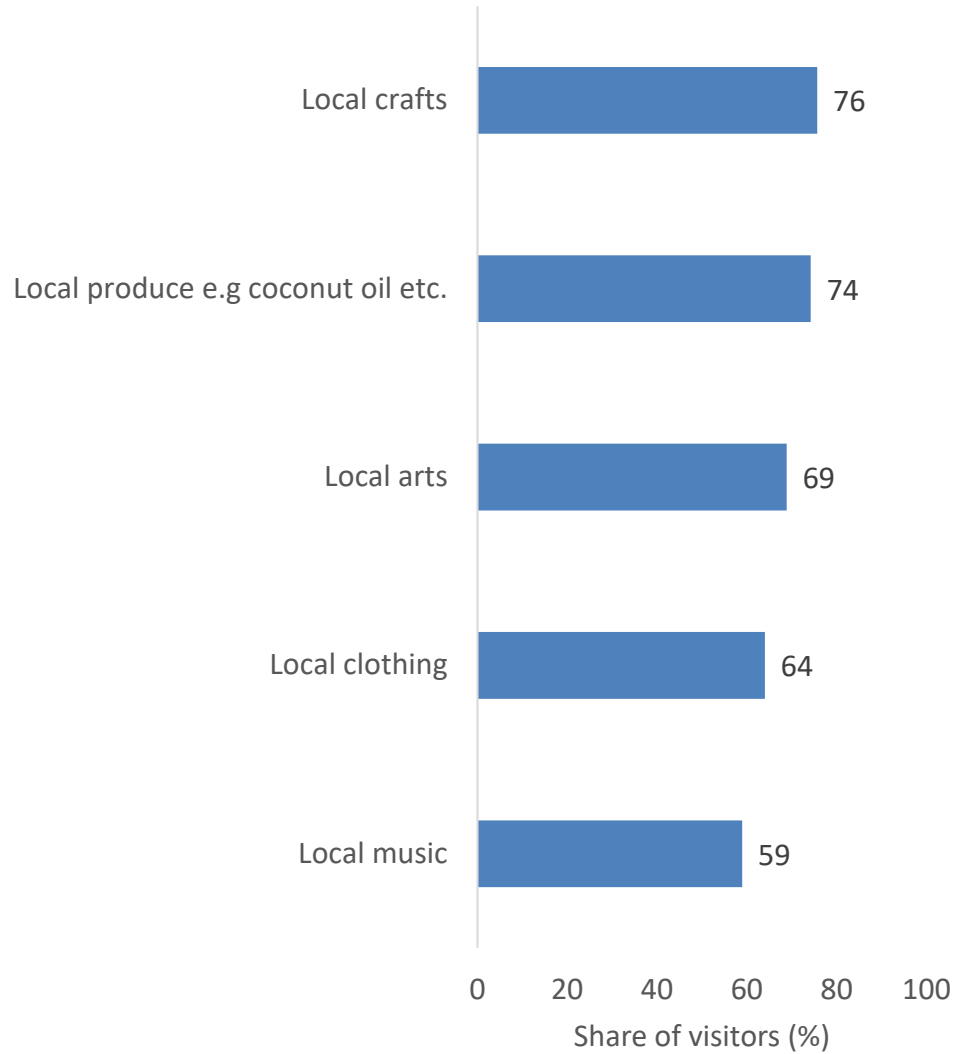
# Land Based Activities and Touring



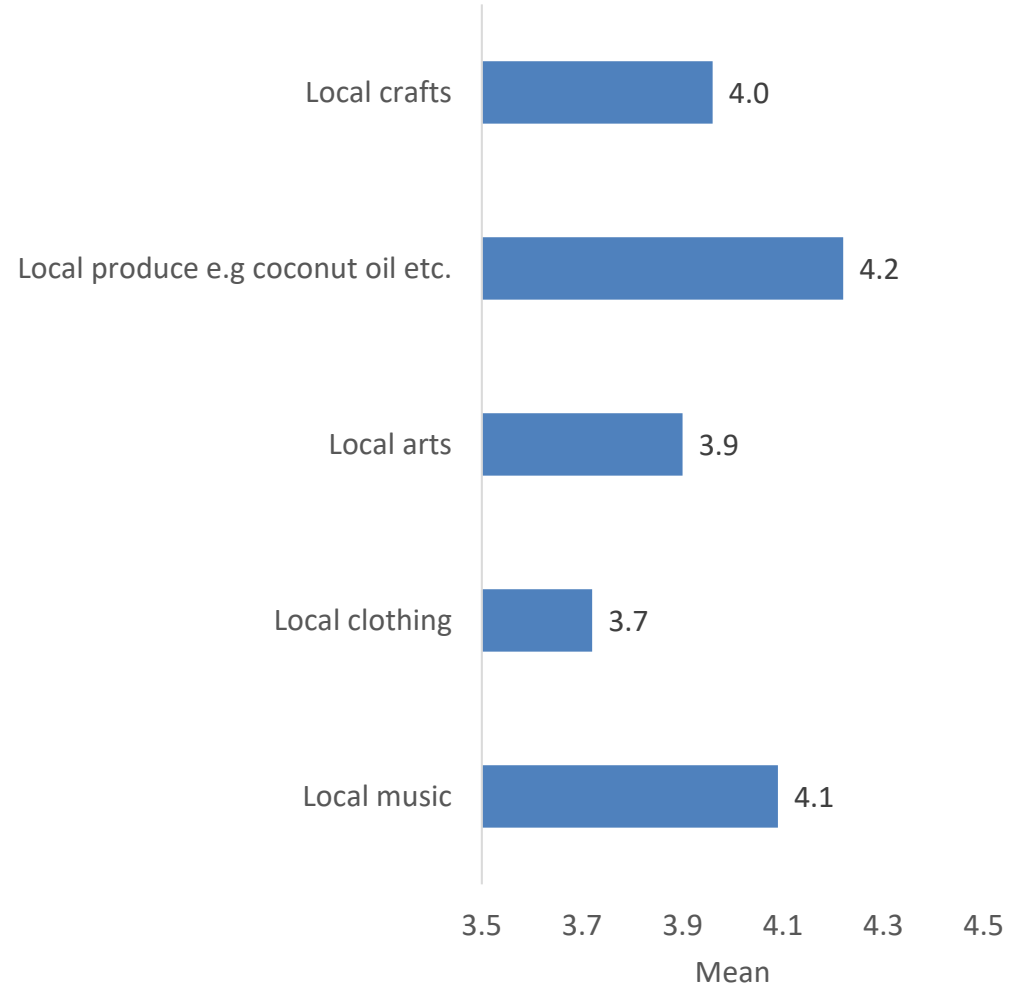
Note: Multiple responses, therefore total does not add up to 100%

# Shopping

Degree of Participation

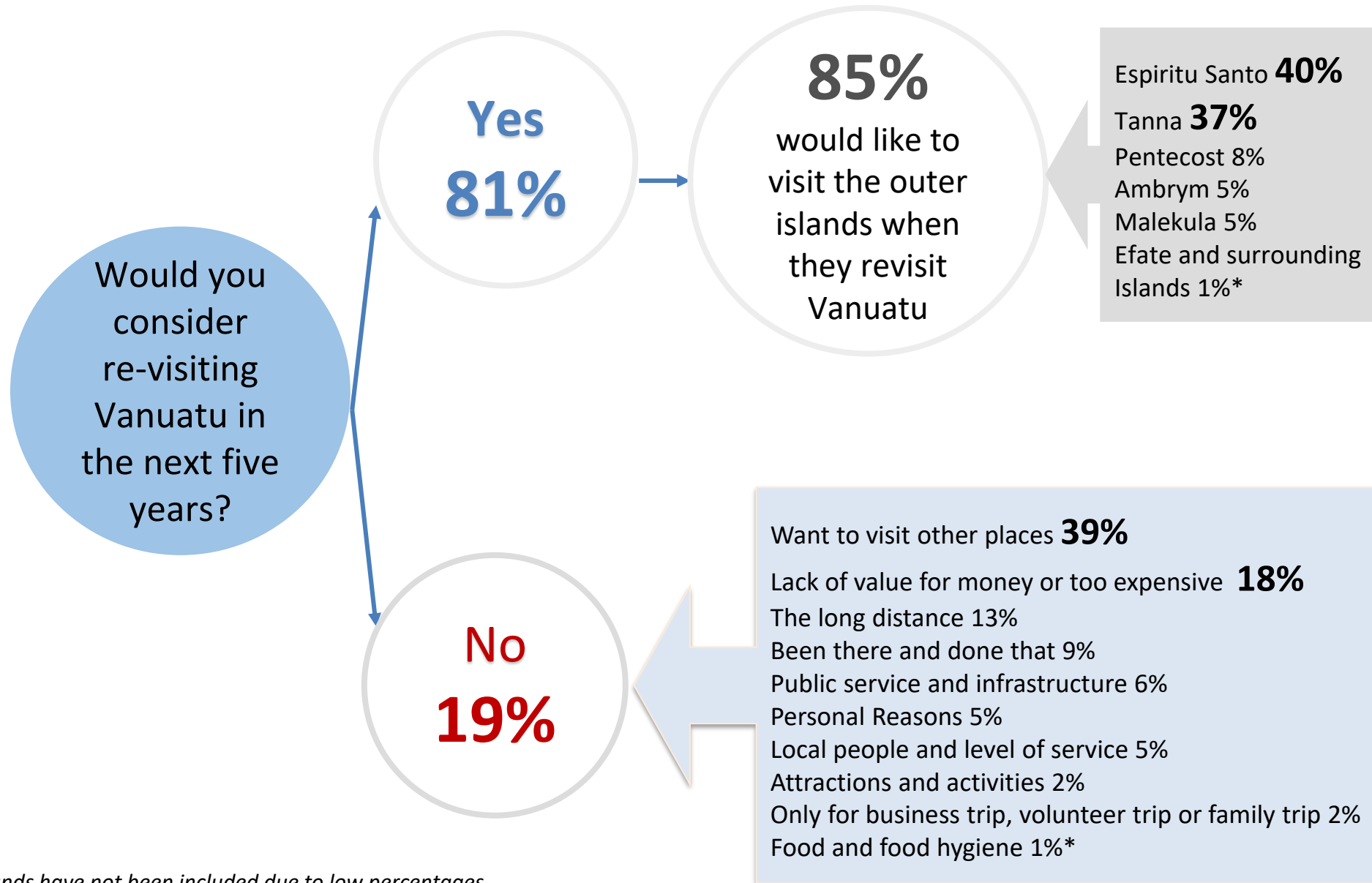


Satisfaction



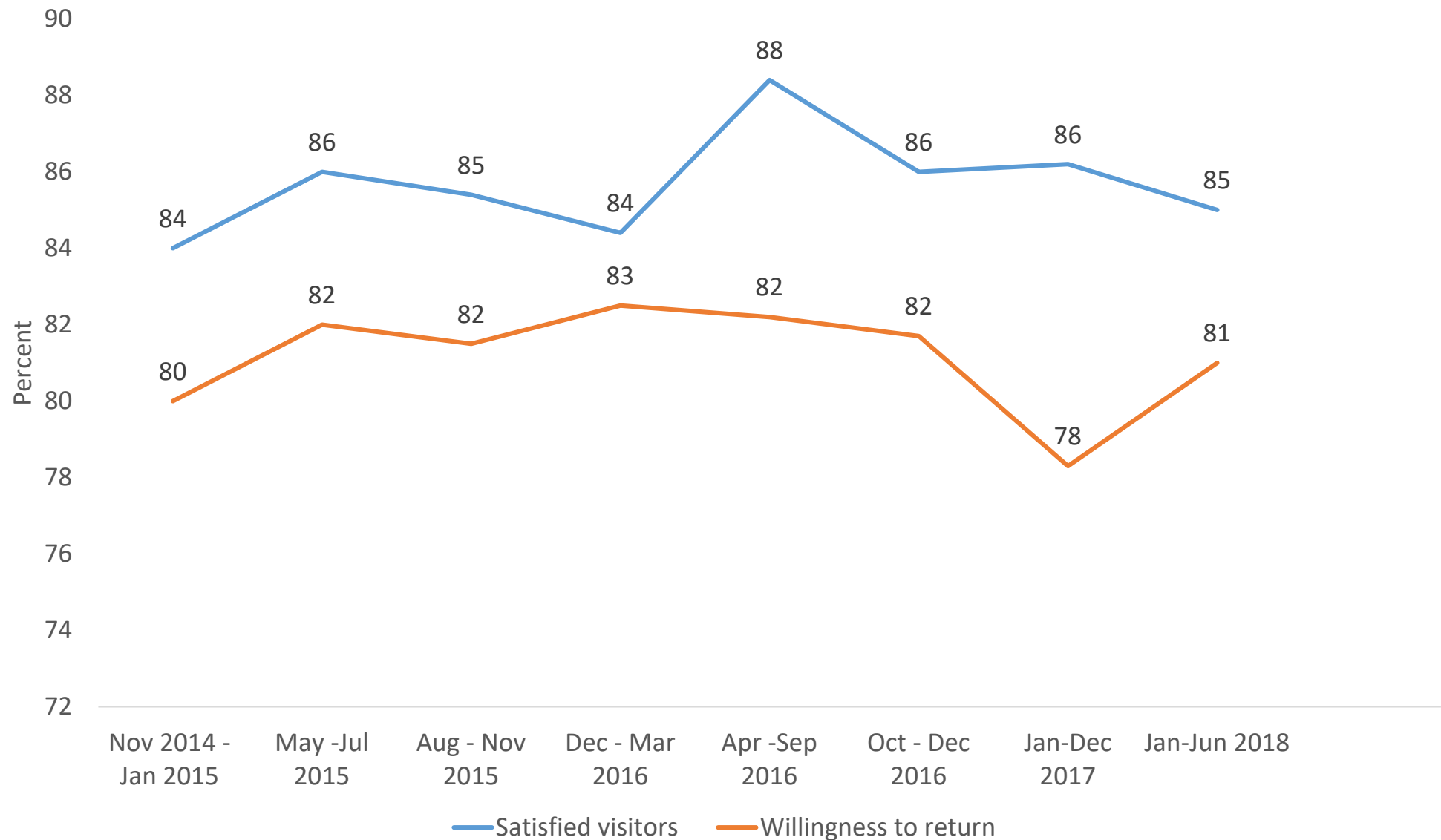
*Note: Multiple responses, therefore total does not add up to 100%*

# Willingness to Return



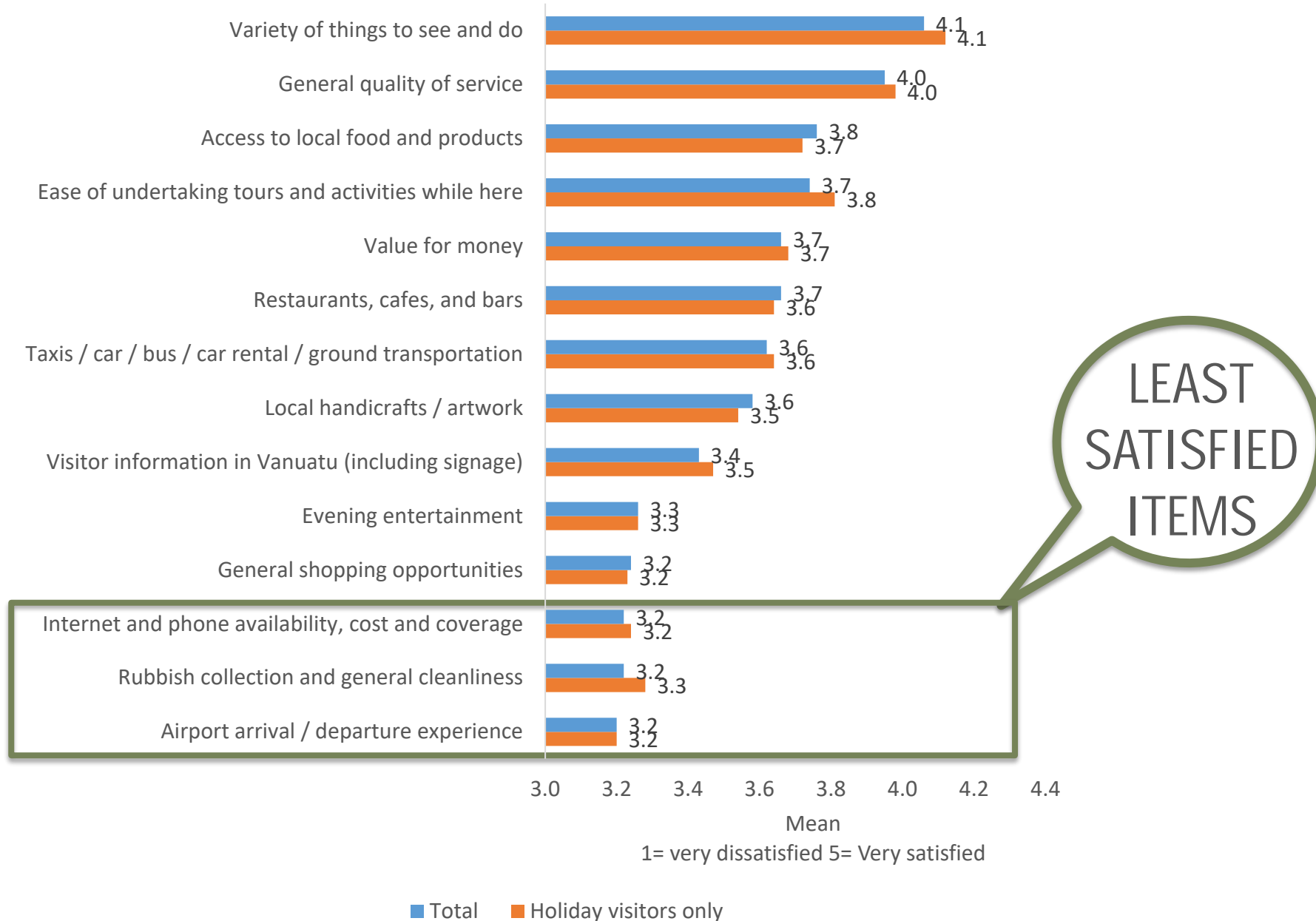
\* Other reasons/Islands have not been included due to low percentages

# Willingness to Return and Satisfaction



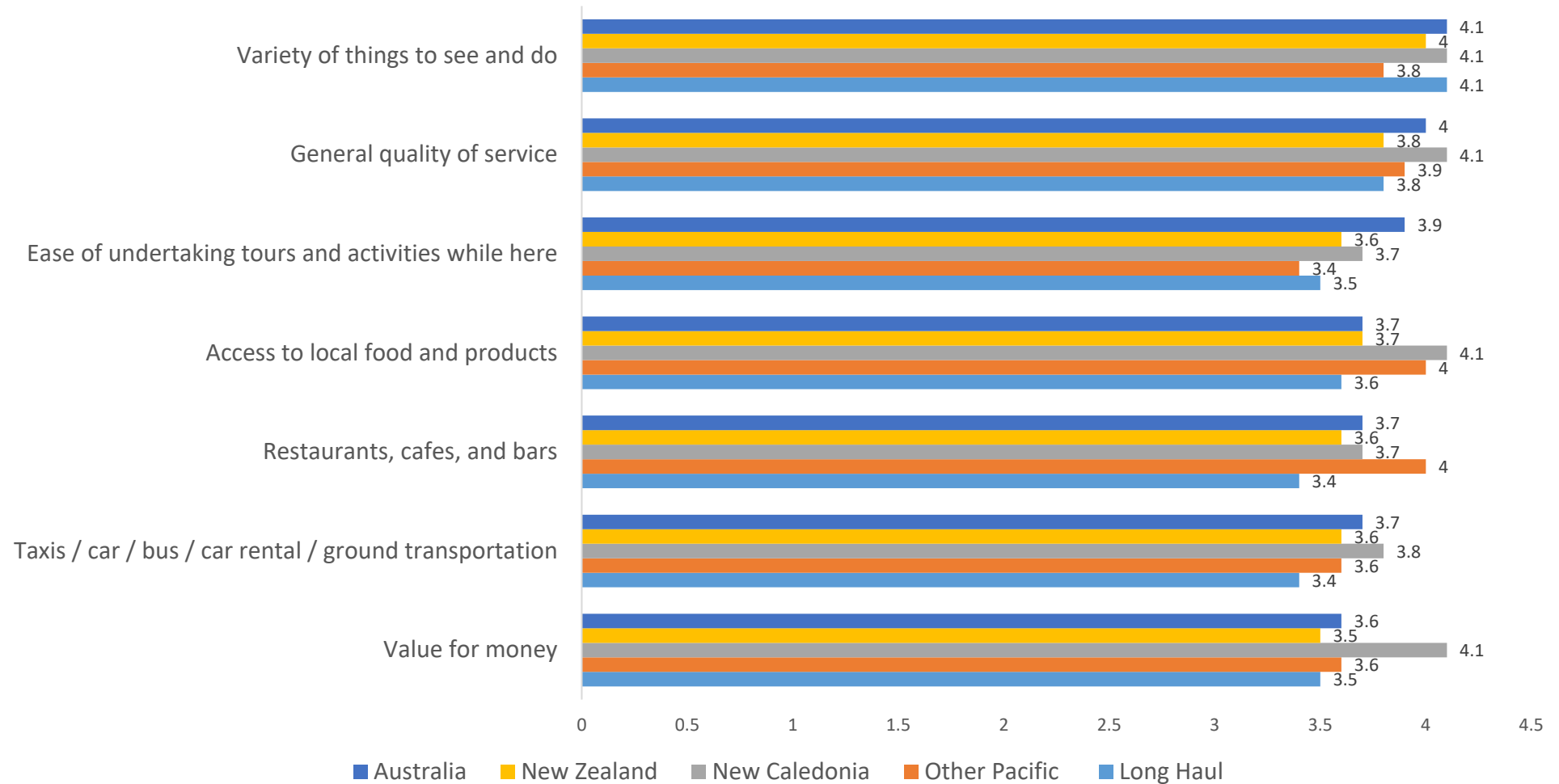
\* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

# Degree of Satisfaction – Total VS Holiday visitors



# Degree of satisfaction – Market

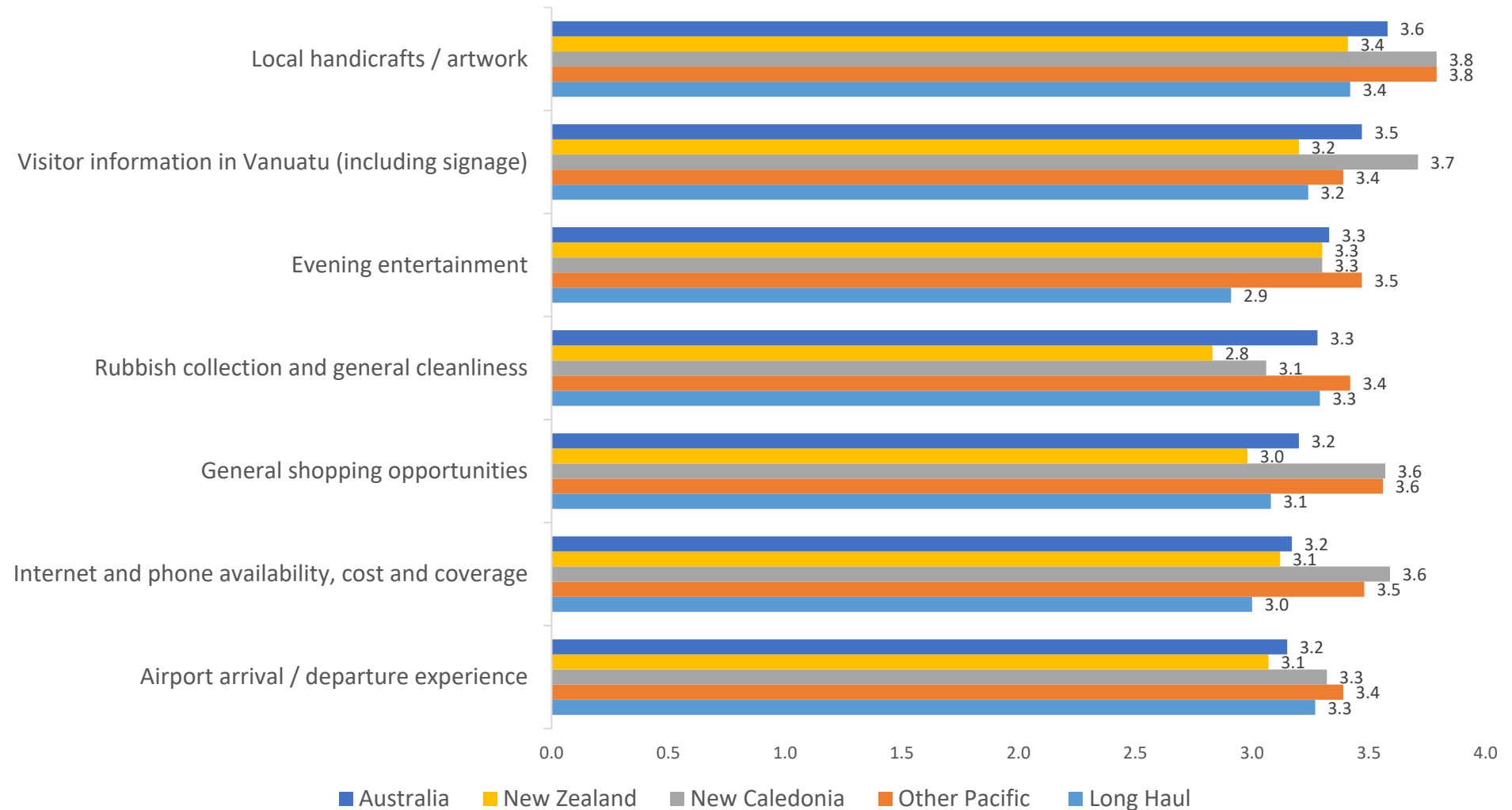
## Market breakdown 1





# Degree of satisfaction – Market

## Market breakdown 2



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.”

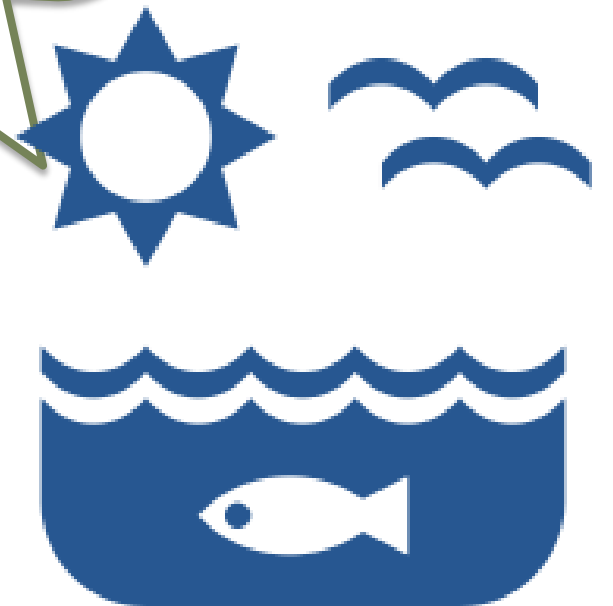
“The snorkelling is amazing. The coral is beautiful and there is more coral here than the other islands we have visited. The fish life is varied and abundant.”



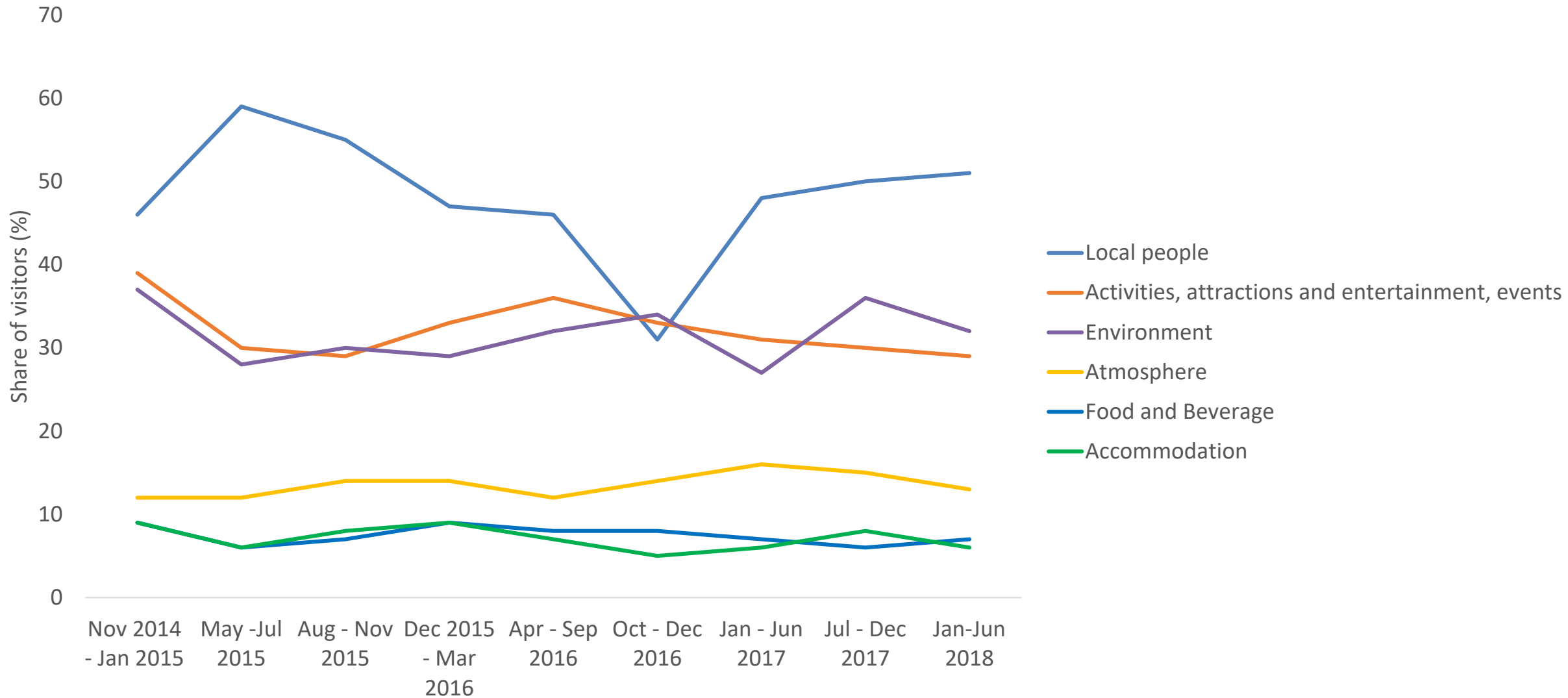
# Most Appealing Aspects of Vanuatu

"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."

"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 :)"



# Most appealing items



# 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

Chinese influence in shops/commerce."

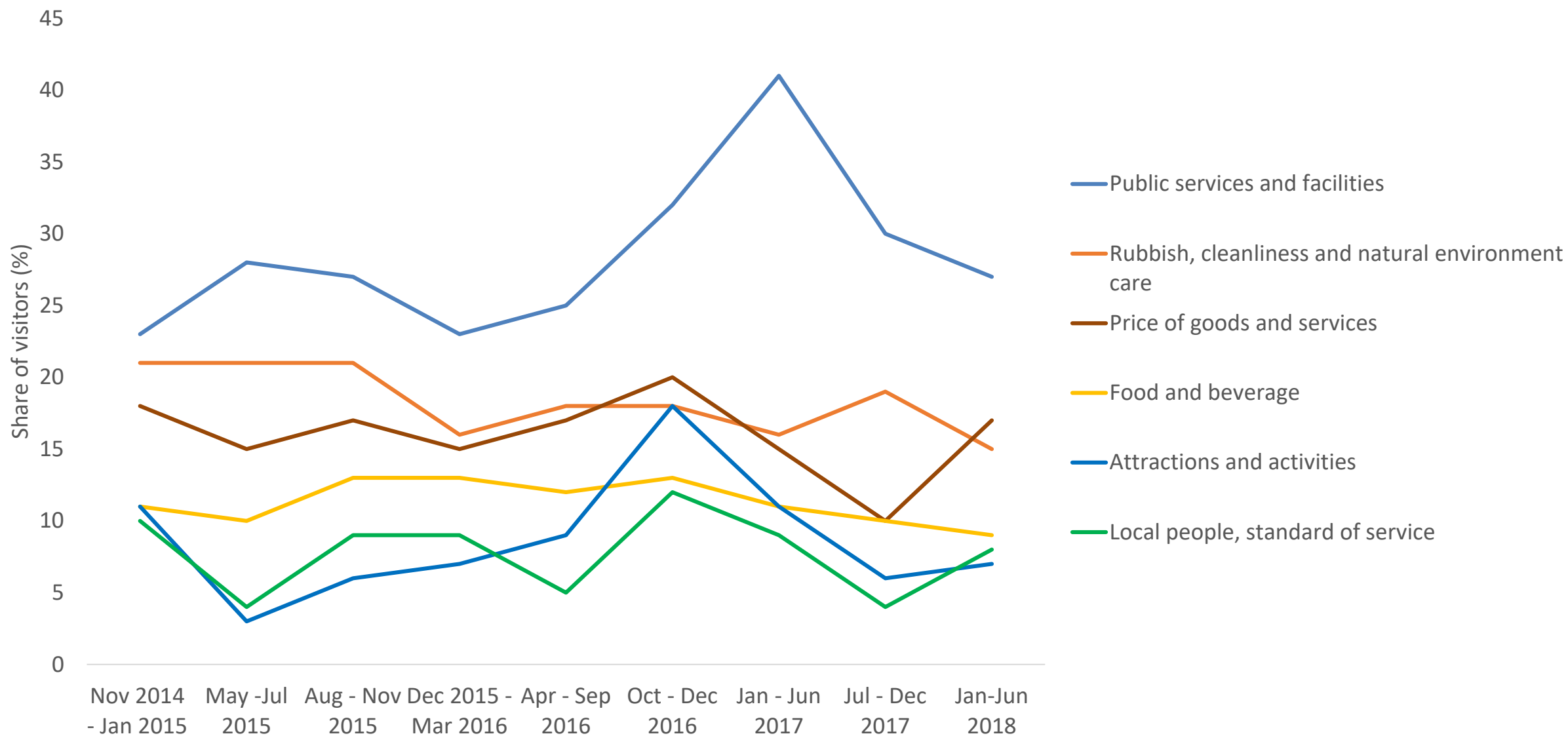
"Lots of things were shut because we visited out of season, but we did not discover the problem until we had already arrived. There is not always up-to-date info saying whether attractions are open until you get there."

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





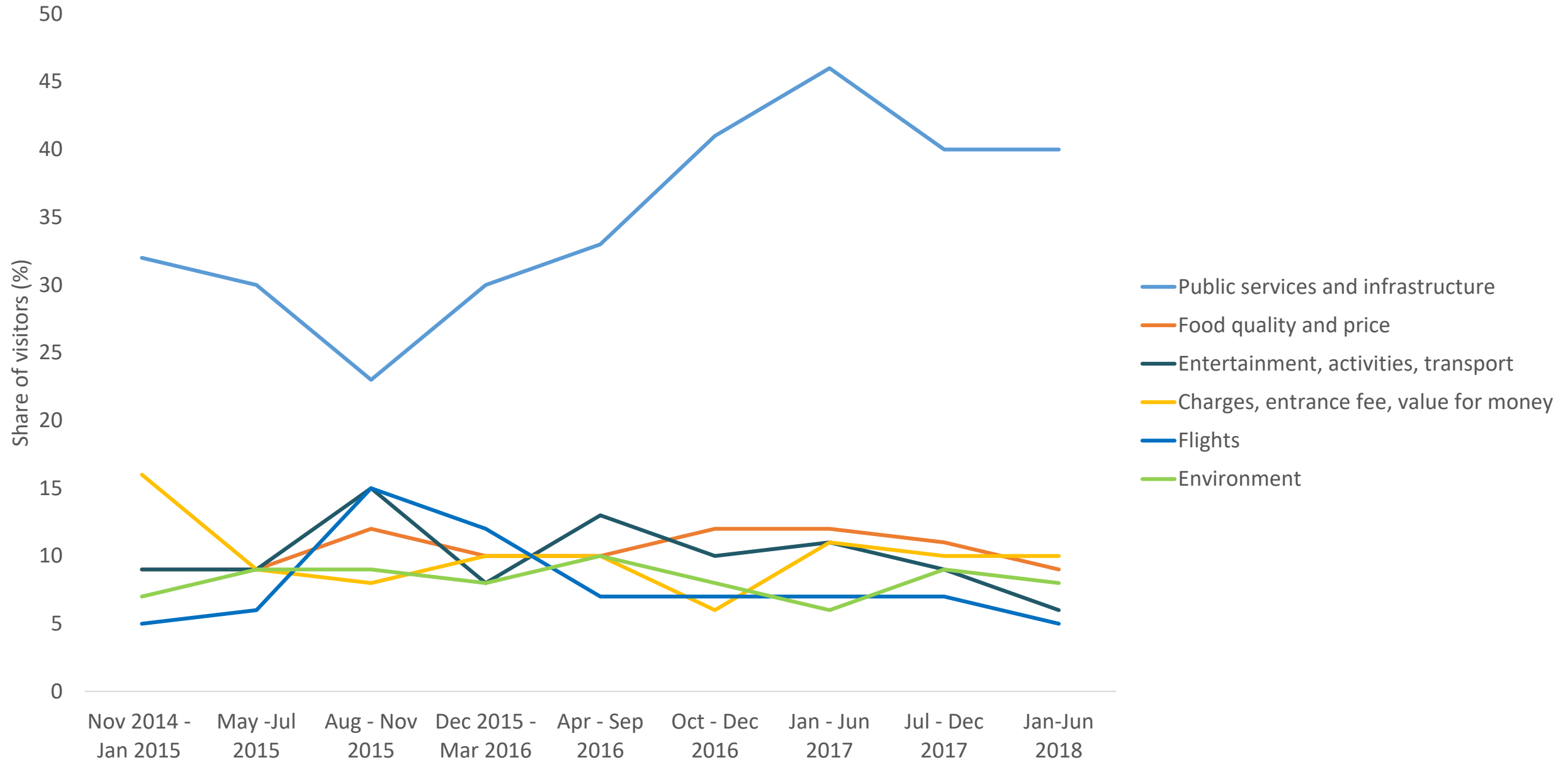
# Least appealing items



# 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





A group of approximately ten people, including adults and children, are standing in a lush, tropical forest. They are dressed in traditional Maori attire, featuring woven skirts and flower leis. Many of them are waving at the camera. The background is filled with dense green foliage and trees. A semi-transparent banner is overlaid on the top half of the image.

THANK YOU

**Simon Milne**

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