

Vanuatu

# INTERNATIONAL VISITOR SURVEY

## New Zealand Visitor Insights: Satisfaction Segmentation

Jan 2018 – March 2020



# Background

- The 2018 to 2020 IVS data set is analysed to help us understand the profile of New Zealand (NZ) visitors to Vanuatu and provide insights into visitor satisfaction. The IVS covers visitors aged 18+.
- Based on satisfaction level of visitors' overall experience in Vanuatu, four groups are compared: Very satisfied visitors (labelled 'Very satisfied'), satisfied visitors (labelled 'Satisfied'), neutral visitors (labelled 'Neutral') and, very dissatisfied and dissatisfied visitors (labelled 'Dissatisfied').
- NB The dataset includes 27 months of data from Jan 2018 to March 2020 (when borders closed to tourists).
- All reports from the IVS are available at: [www.nztri.org.nz/visitor-research/pacific](http://www.nztri.org.nz/visitor-research/pacific)

# Report Structure



Visitor  
Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

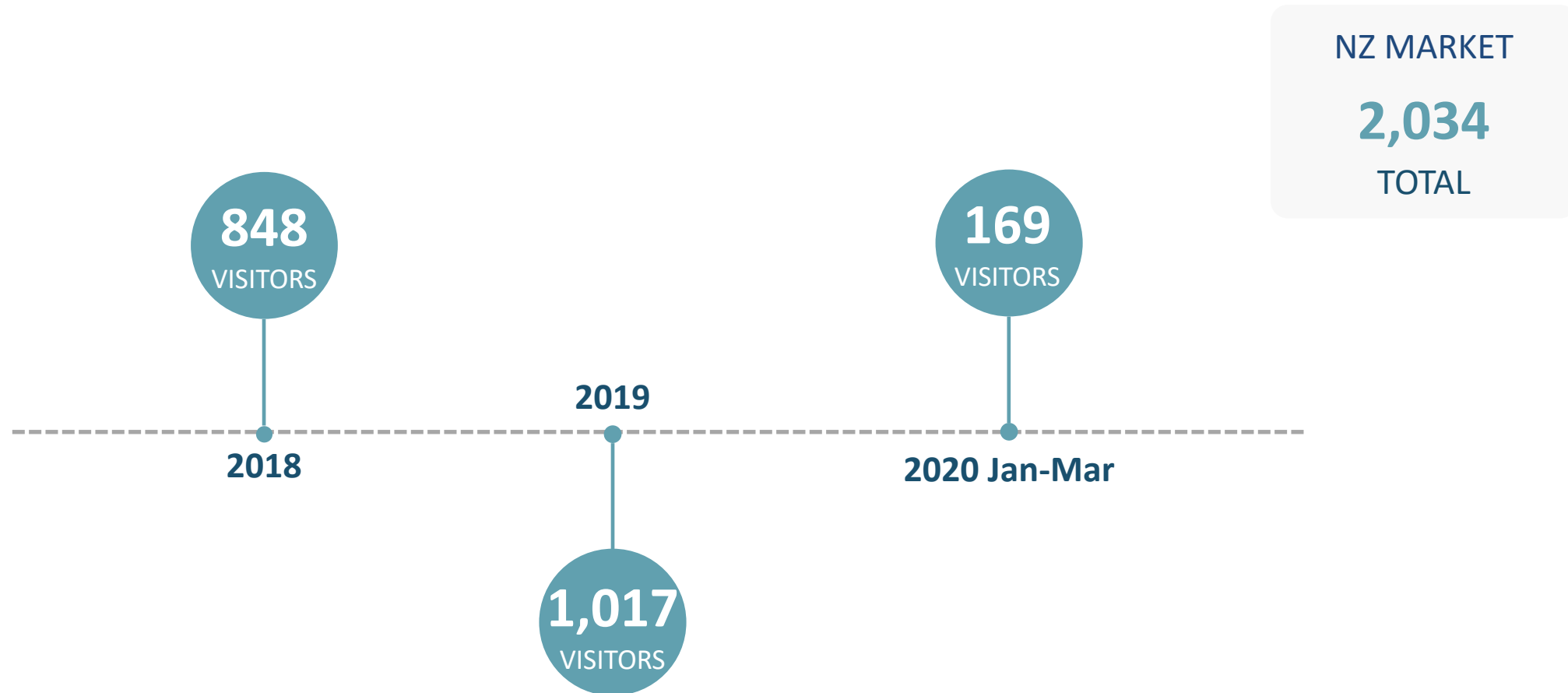


Visitor Spending  
and Impact

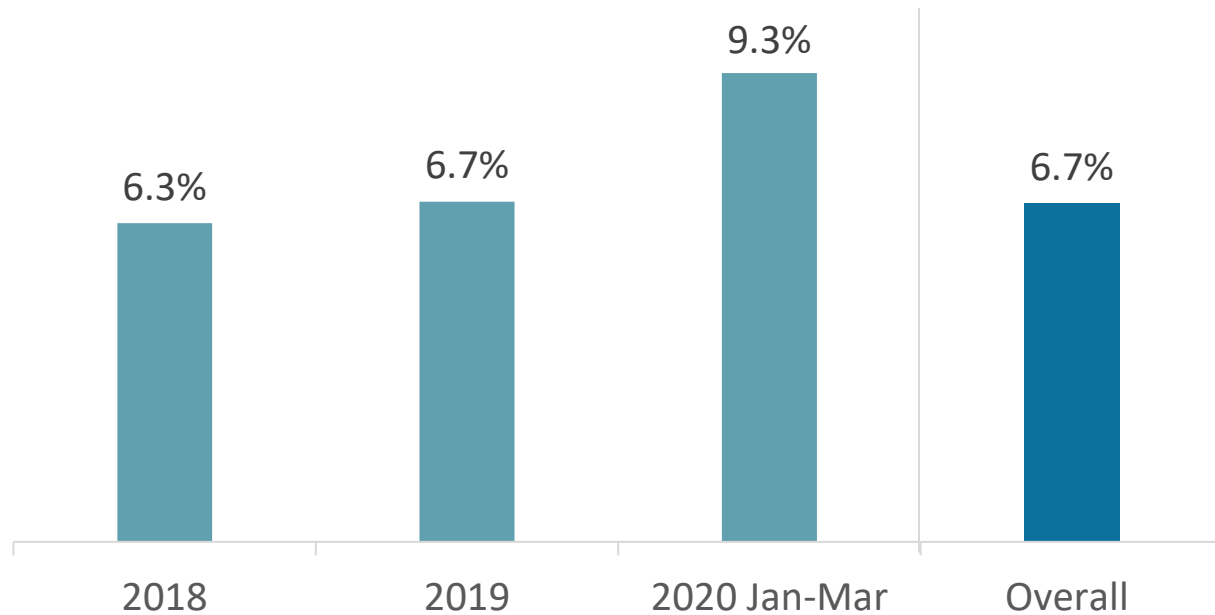


Visitor  
Satisfaction

The number of surveyed NZ visitors from 2018 January to 2020 March is 2034 in total.



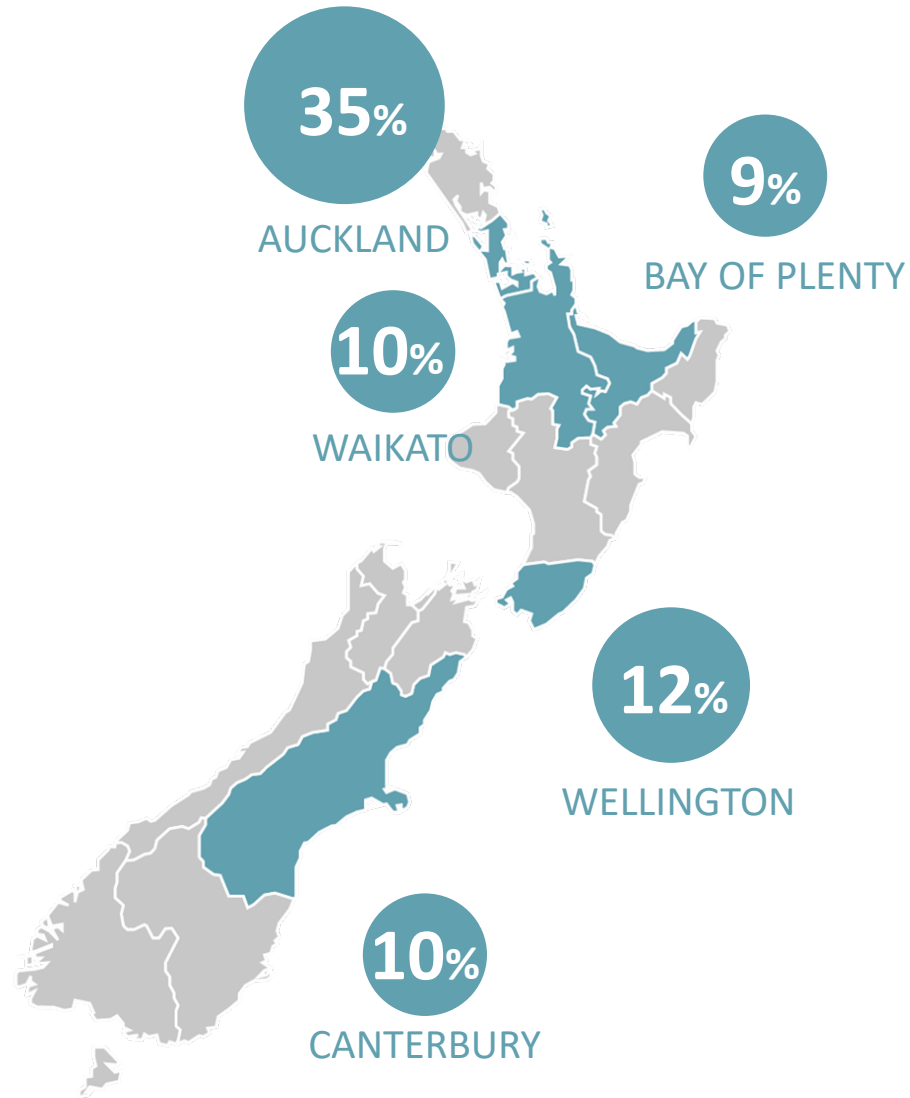
# The percentage of NZ IVS respondents relative to NZ actual arrivals to Vanuatu by year.



|              | <u>NZ</u><br><u>ACTURAL ARRIVALS</u> | <u>NZ IVS</u><br><u>RESPONDENTS</u> | <u>%</u> |
|--------------|--------------------------------------|-------------------------------------|----------|
| 2018 Annual  | 13432                                | 848                                 | 6.3      |
| 2019 Annual  | 15085                                | 1017                                | 6.7      |
| 2020 Jan-Mar | 1819                                 | 169                                 | 9.3      |
| Overall      | 30336                                | 2034                                | 6.7      |

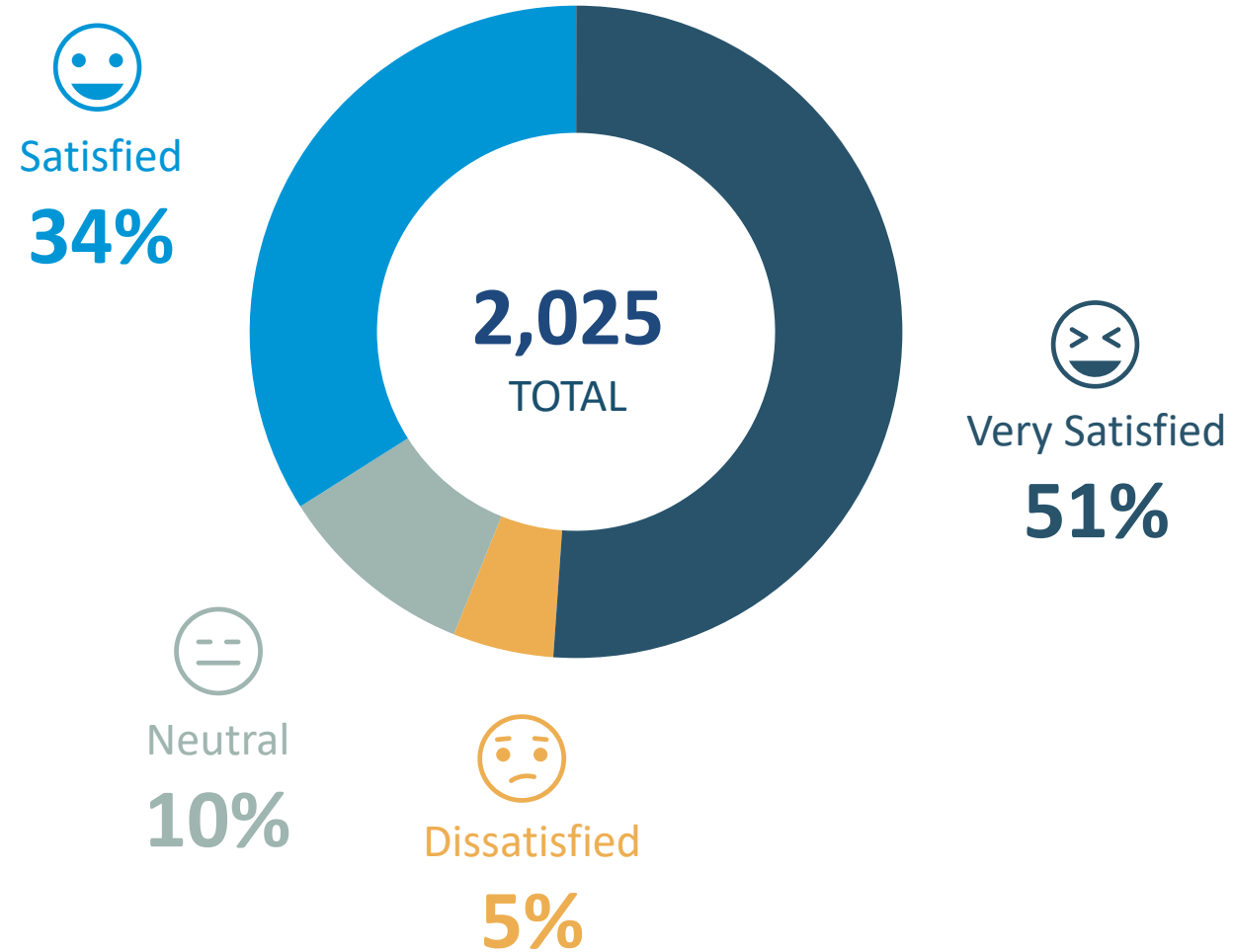
\*IVS covers visitors aged 18 plus

# Visitors from Auckland make up the largest part of the NZ market.

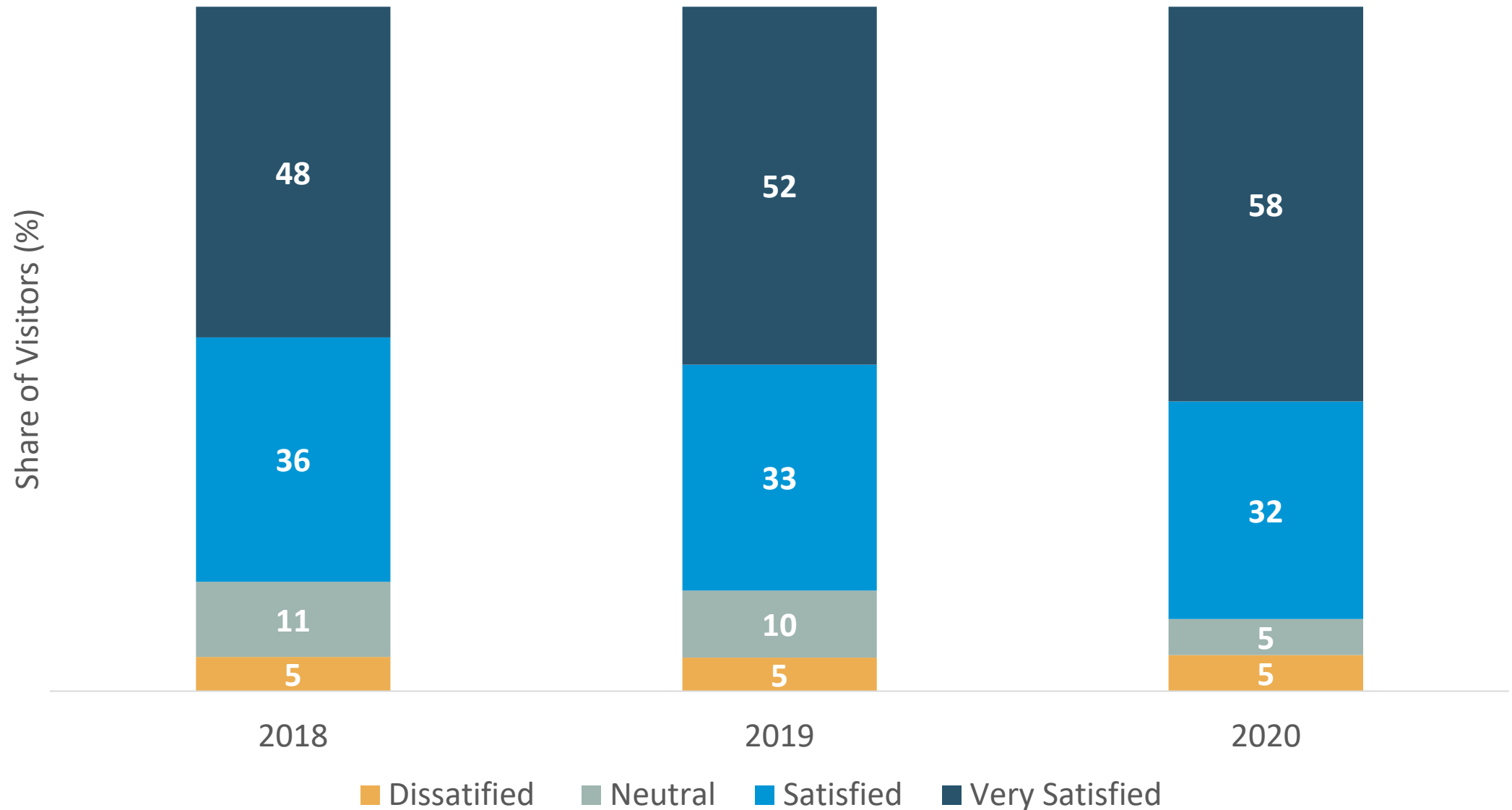


Auckland, Wellington, Waikato, Bay of Plenty and Canterbury make up **75%** of all the New Zealand market to Vanuatu.

# IVS Jan. 2018 – Mar. 2020 : Levels of reported satisfaction, 85% of NZ visitors are satisfied with their trips to Vanuatu.



## The percentage of Very Satisfied NZ visitors increased from 2018 to 2019.





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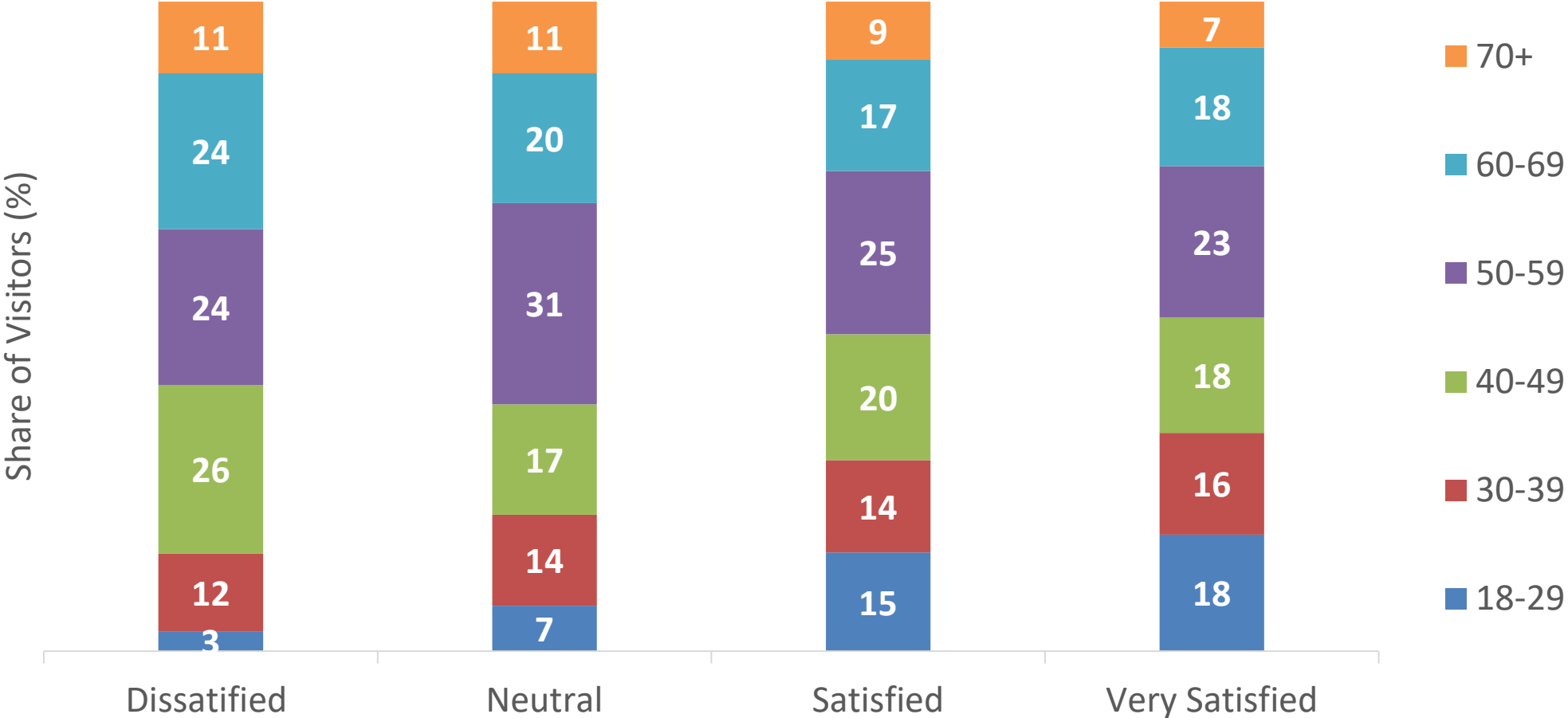


Visitor Spending  
and Impact

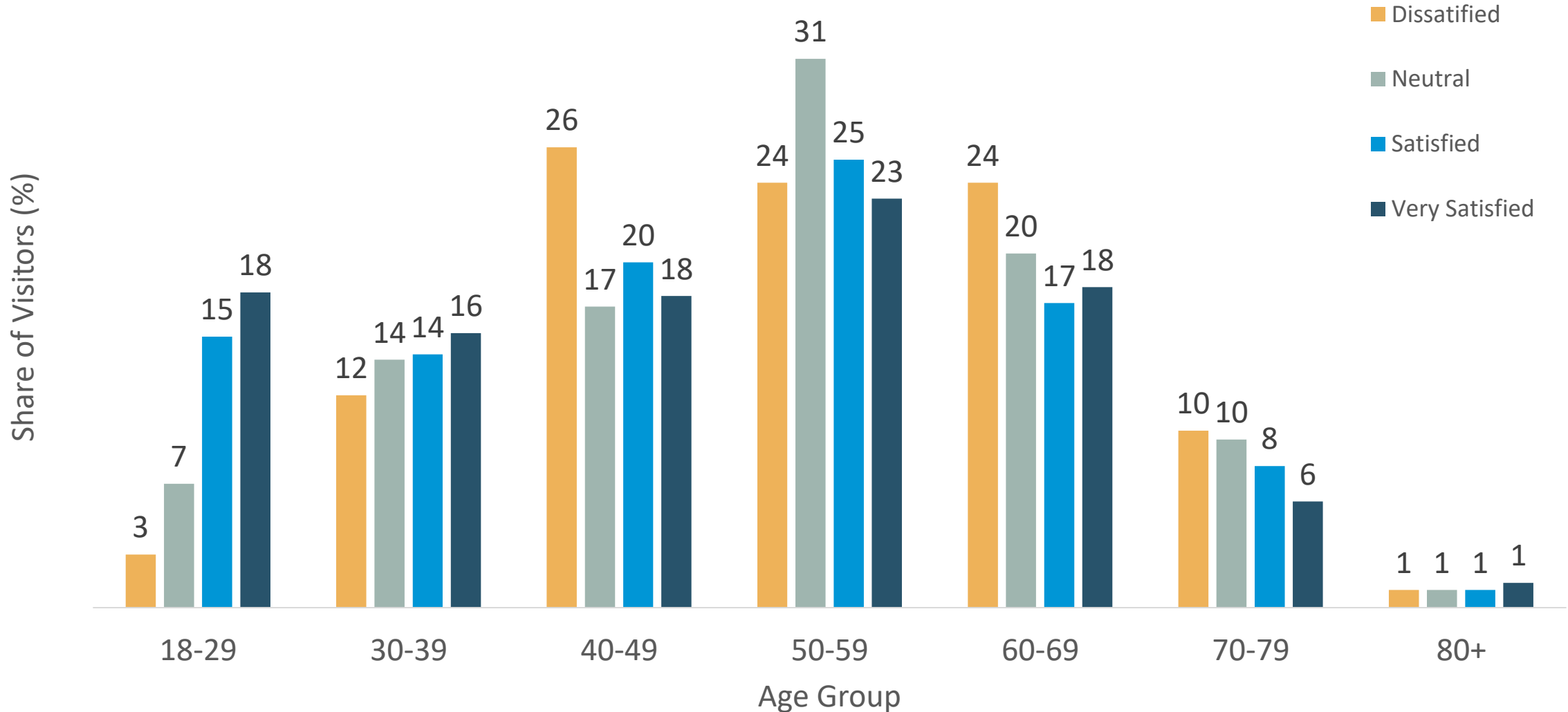


Visitor  
Satisfaction

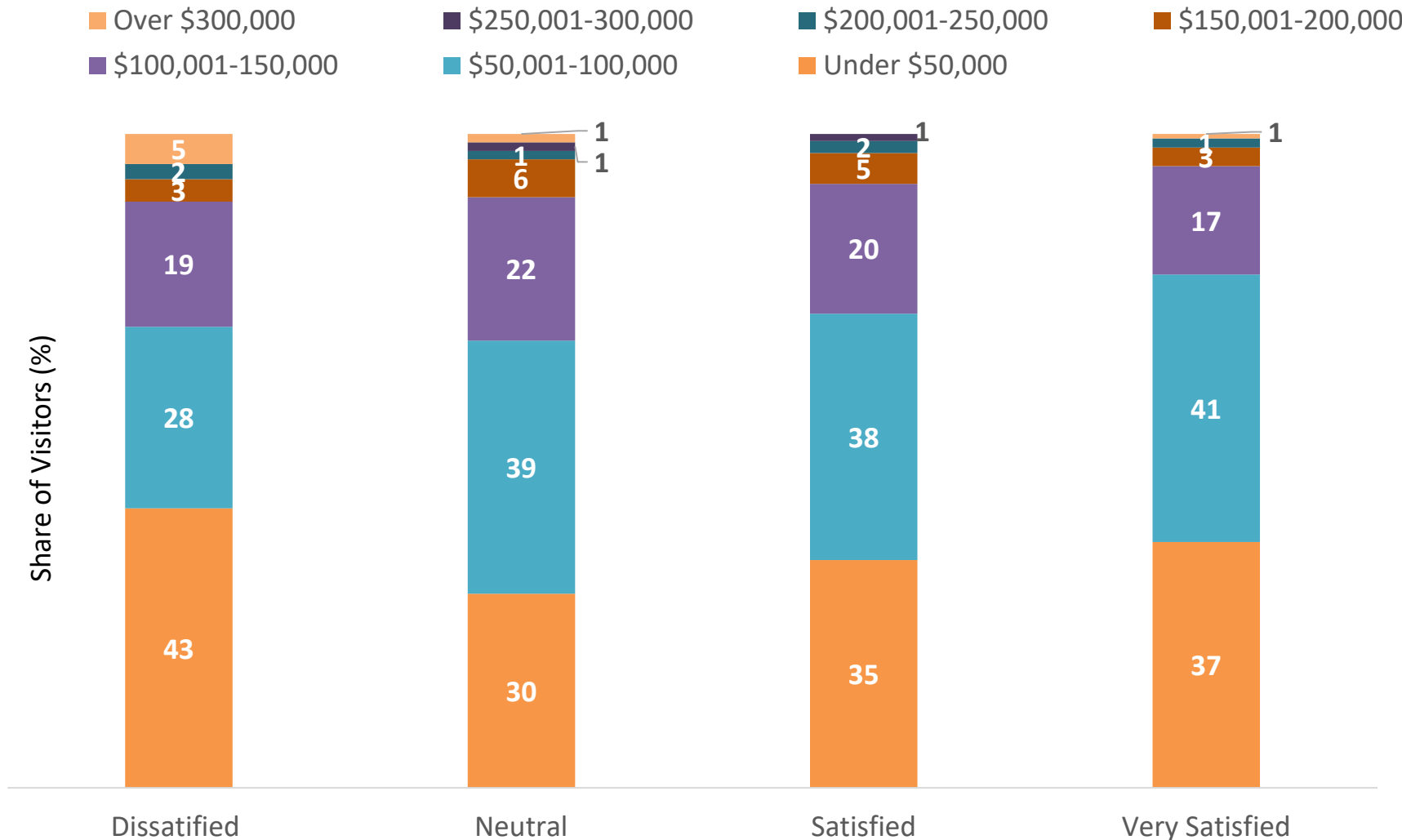
**Very Satisfied and Satisfied NZ visitors feature a younger age profile than Neutral or Dissatisfied visitors. 34% of Very Satisfied visitors are under the age of 39.**



**Very Satisfied and Satisfied NZ visitors exhibit a younger age profile than Neutral or Dissatisfied visitors. Over a third (34%) of Very Satisfied visitors are under the age of 39.**



# The average household income for Very satisfied and Satisfied visitors is lower than that of Dissatisfied or Neutral visitors.



AVG.  
HOUSEHOLD INCOME

**82,974 USD**  
**9,327,974 VT**  
DISSATISFIED

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**83,777 USD**  
**9,418,275 VT**  
NEUTRAL

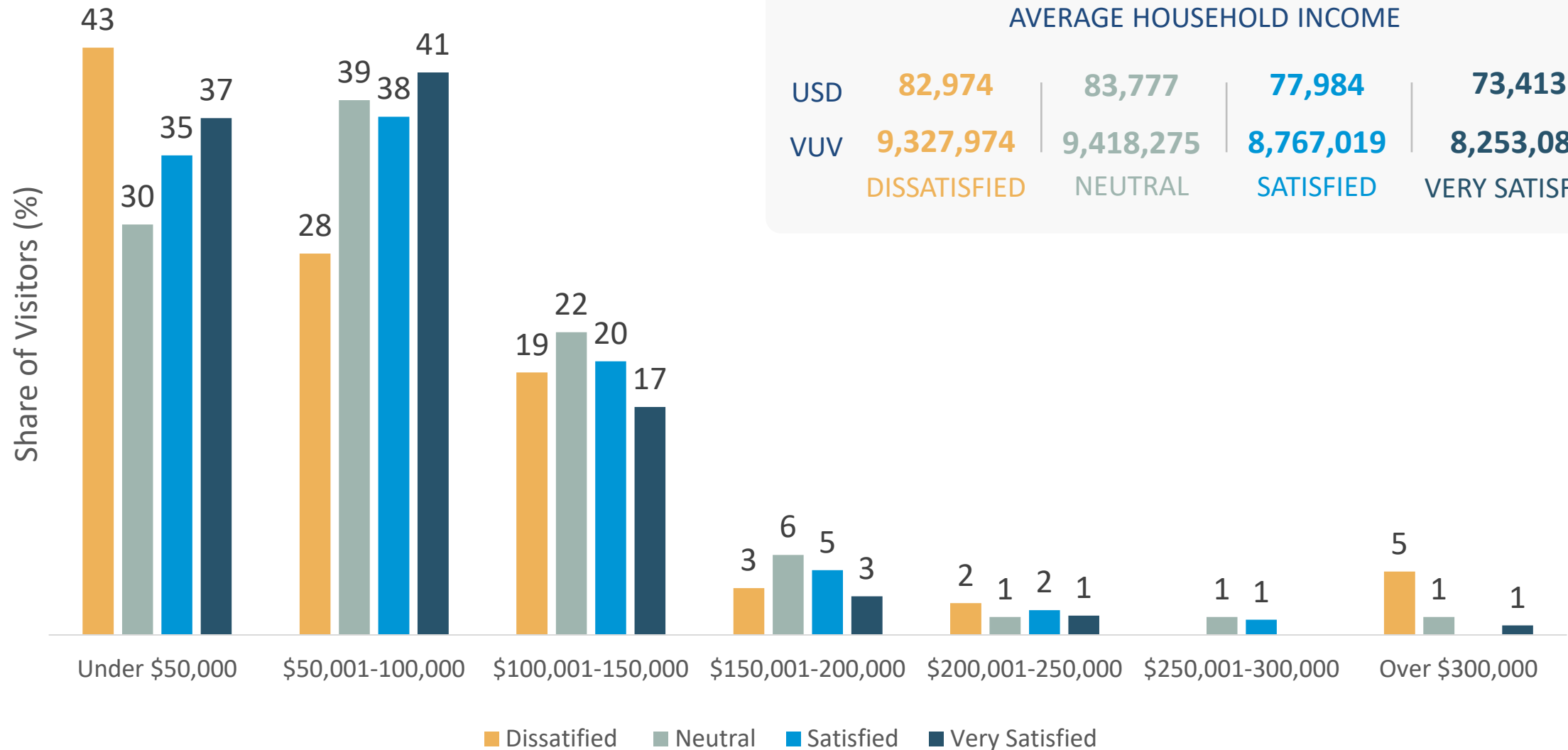
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**77,984 USD**  
**8,767,019 VT**  
SATISFIED

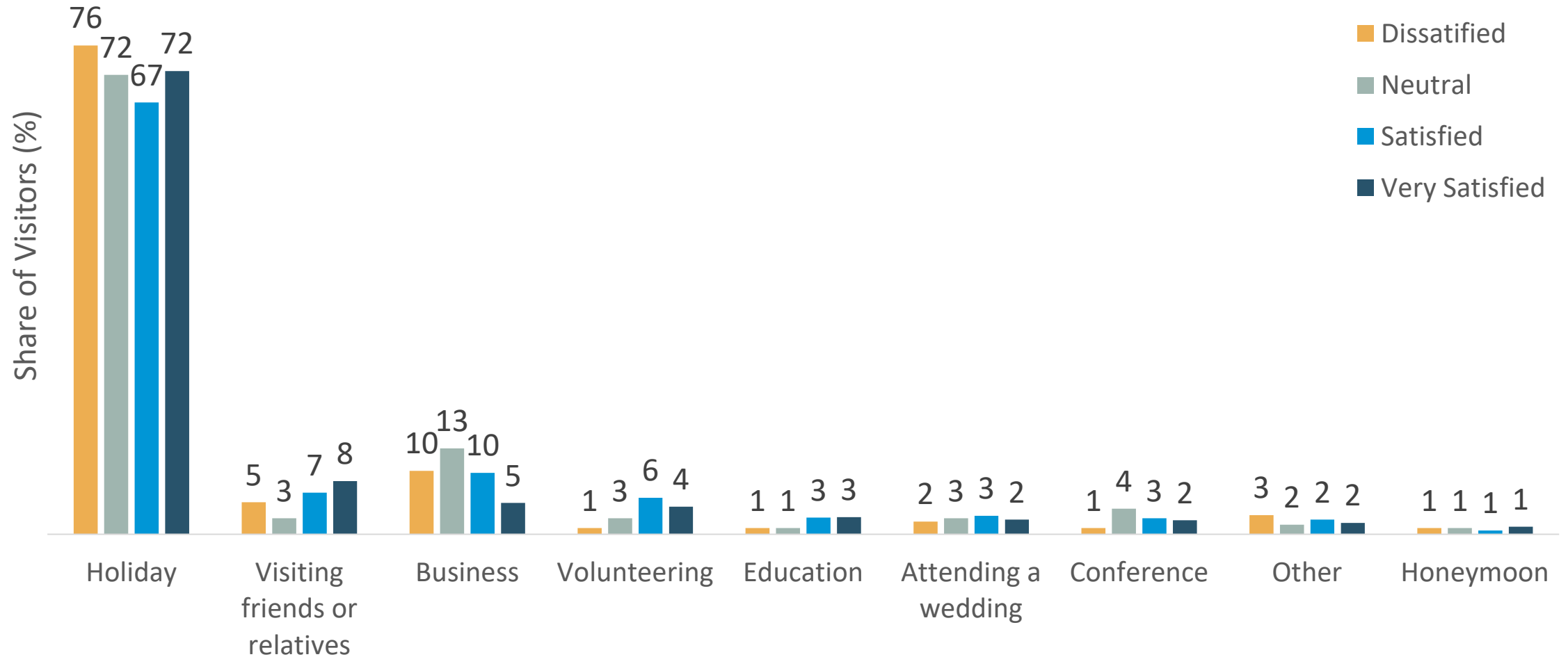
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**73,413 USD**  
**8,253,085 VT**  
VERY SATISFIED

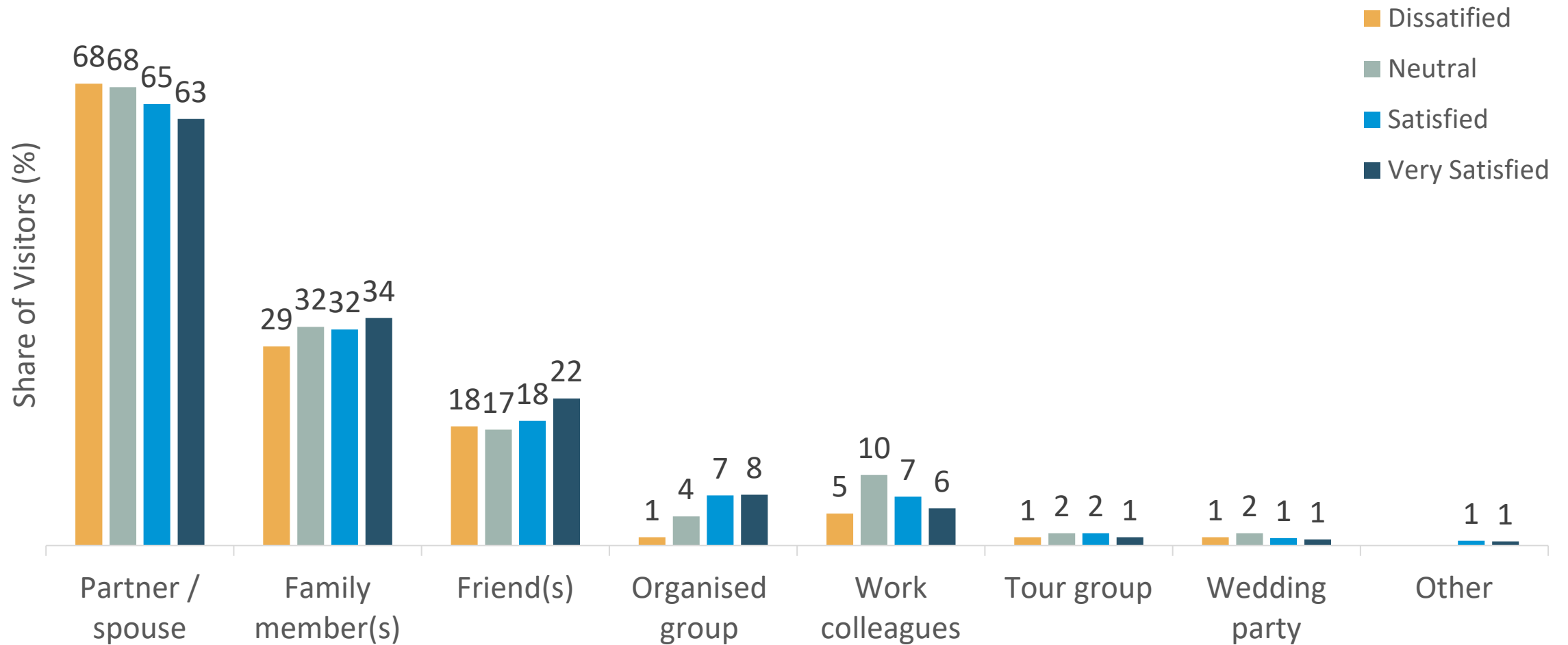
# The average household income for Very satisfied and Satisfied visitors is lower than that of Dissatisfied or Neutral visitors.



All groups indicate Holiday as their main purpose of visit. Very Satisfied and Satisfied visitors exhibit a higher percentage of VFR visits. Neutral visitors have a greater tendency to travel more for Business and Conferences.

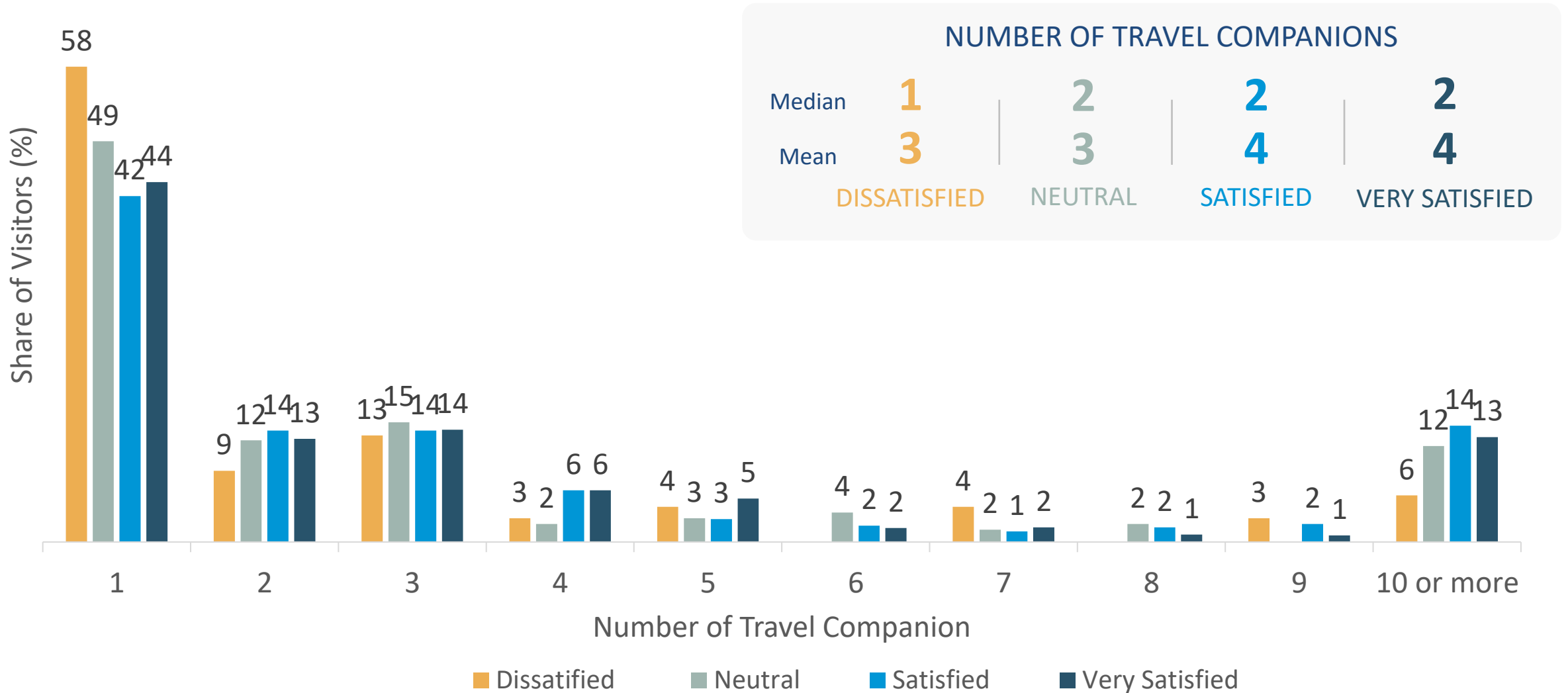


# Very Satisfied NZ visitors are more likely to travel with family members or friends than other segments.



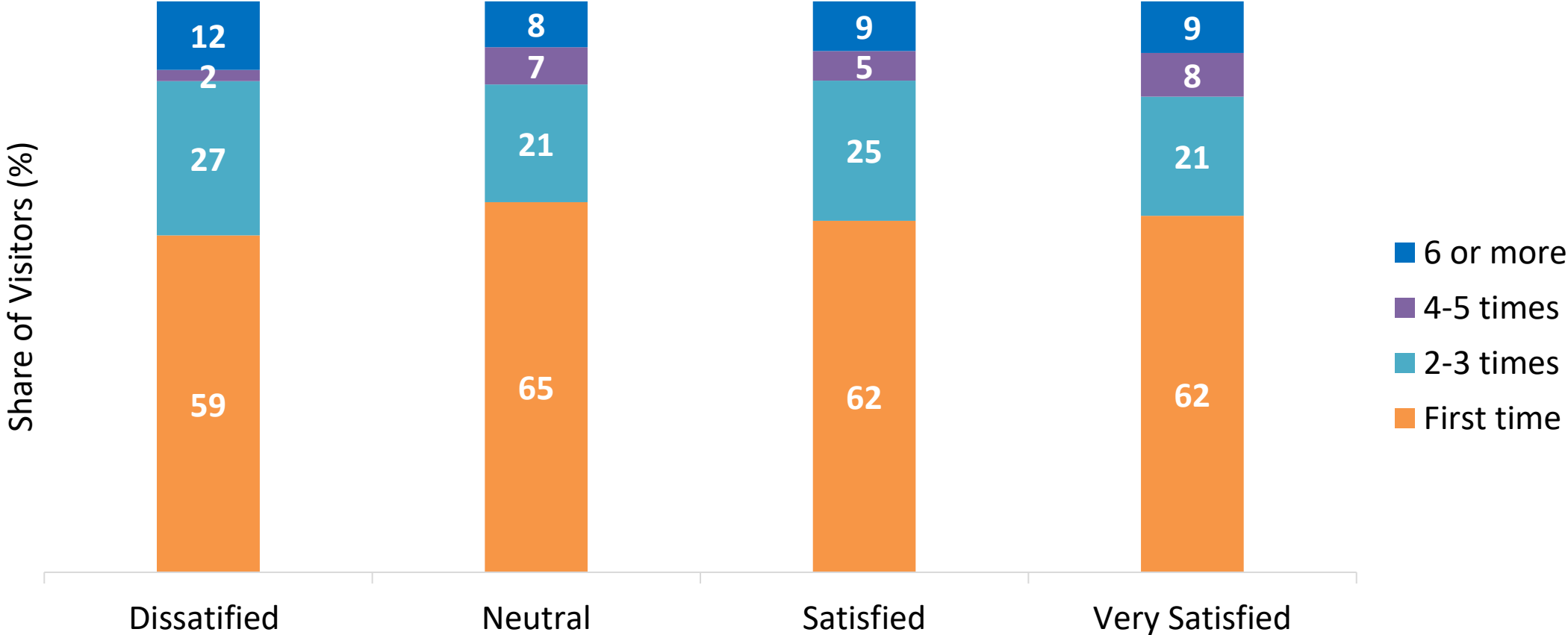
Note: Multiple responses, therefore total does not add up to 100%

# Very Satisfied and Satisfied visitors have a slightly larger group size than Dissatisfied or Neutral visitors.

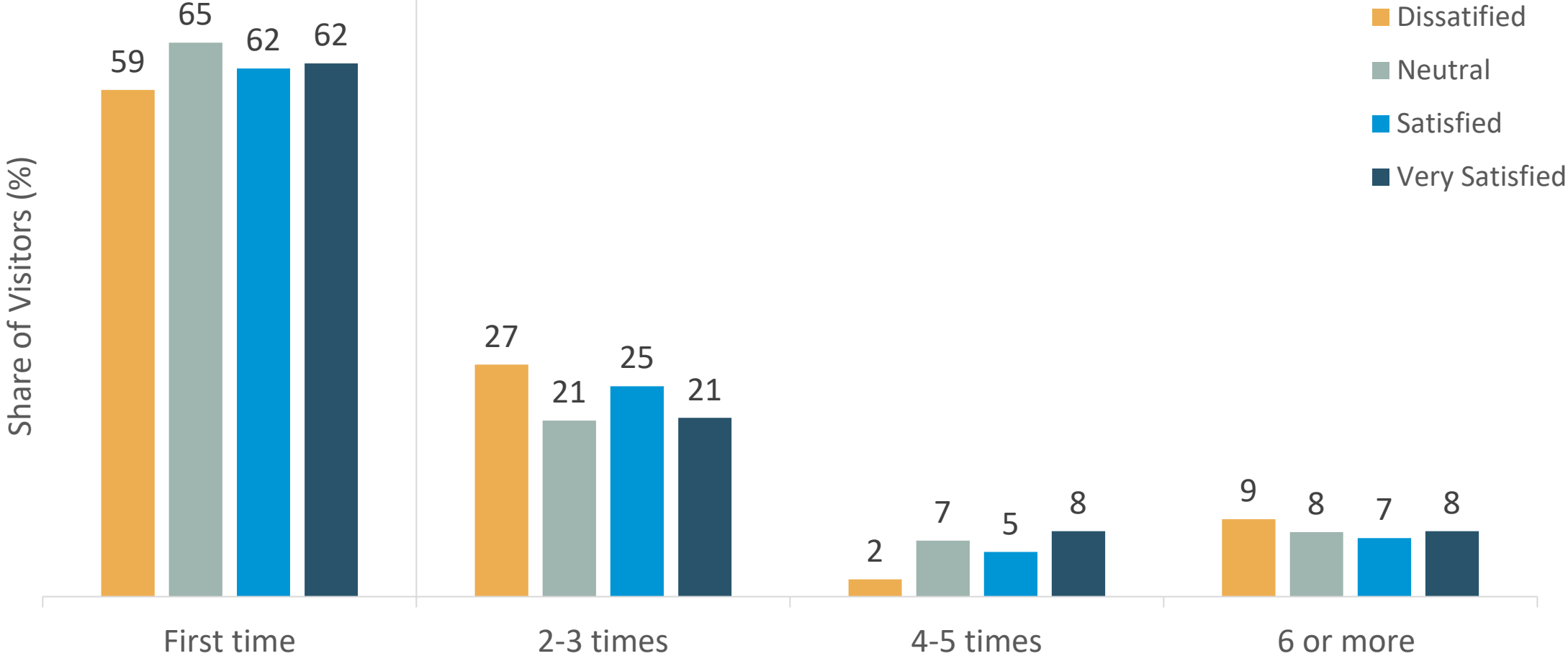




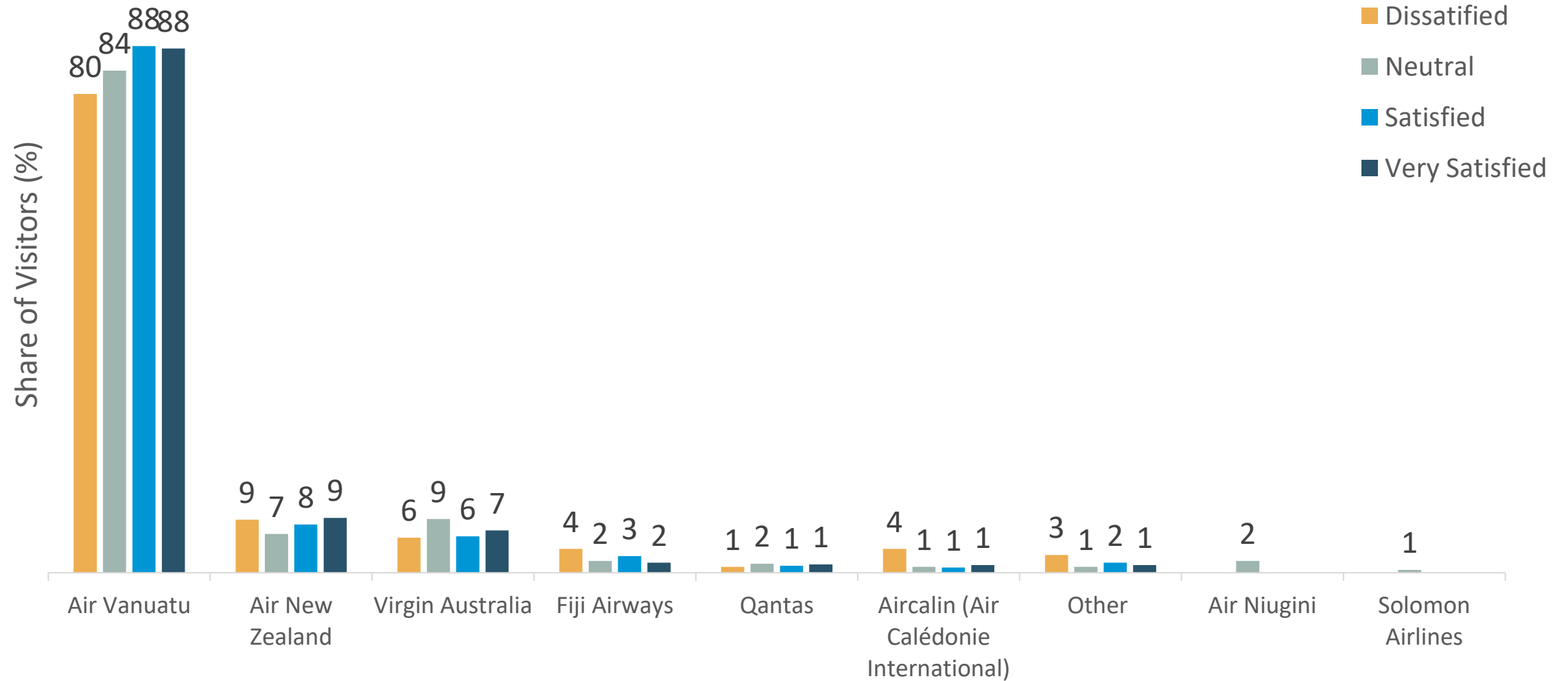
Well over a third (38%) of Very Satisfied and Satisfied NZ visitors are repeat visitors to Vanuatu. Over a quarter (27%) of Dissatisfied visitors have visited Vanuatu 2 to 3 times. Neutral visitors are more likely to be visiting for the first time than other segments.



Well over a third (37%) of Very Satisfied and Satisfied NZ visitors are repeat visitors to Vanuatu. Over a quarter (27%) of Dissatisfied visitors have visited Vanuatu 2 to 3 times. Neutral visitors are more likely to be visiting for the first time than other segments.

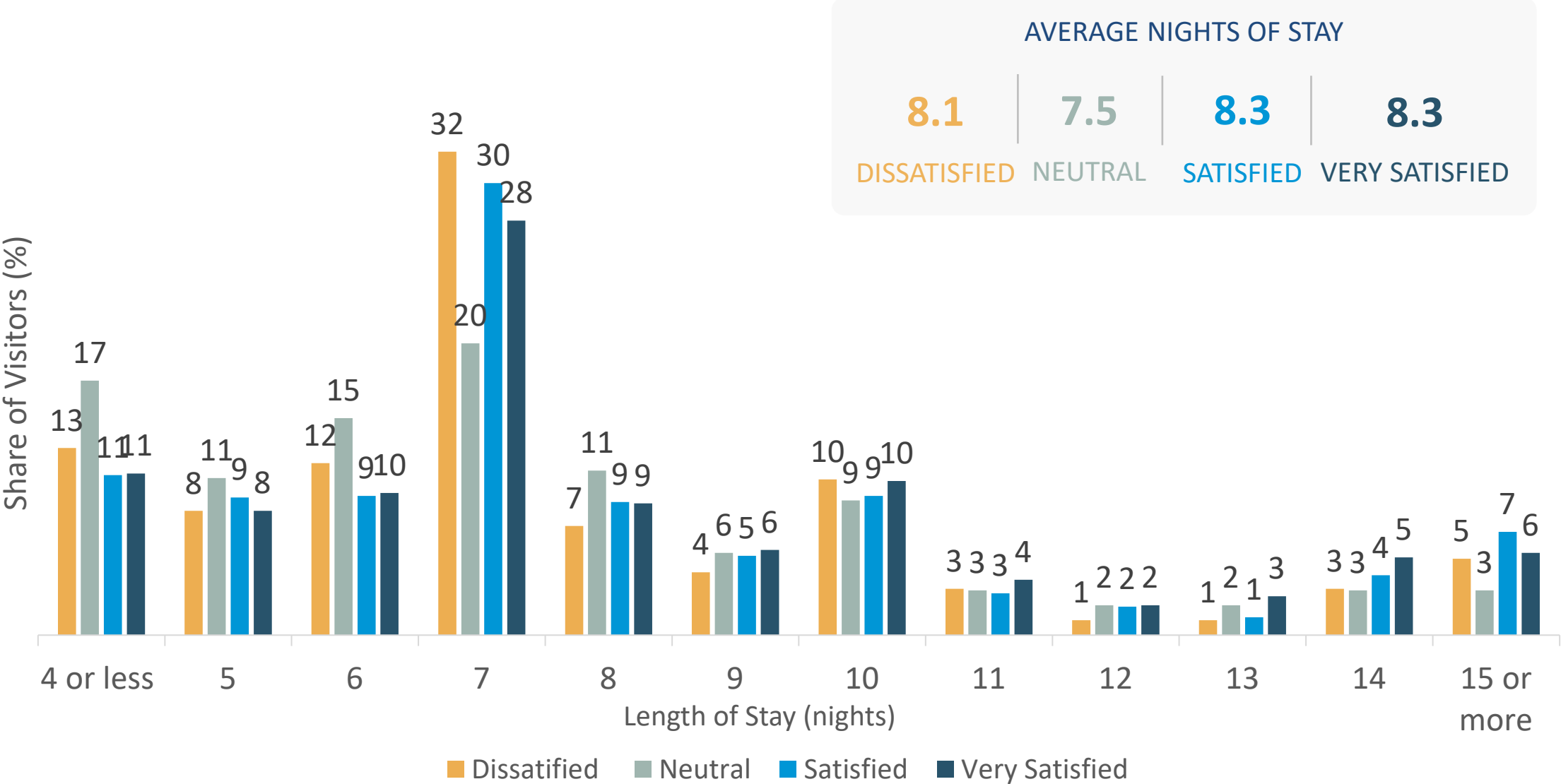


## Almost 90% of Very Satisfied and Satisfied visitors use Air Vanuatu to travel.



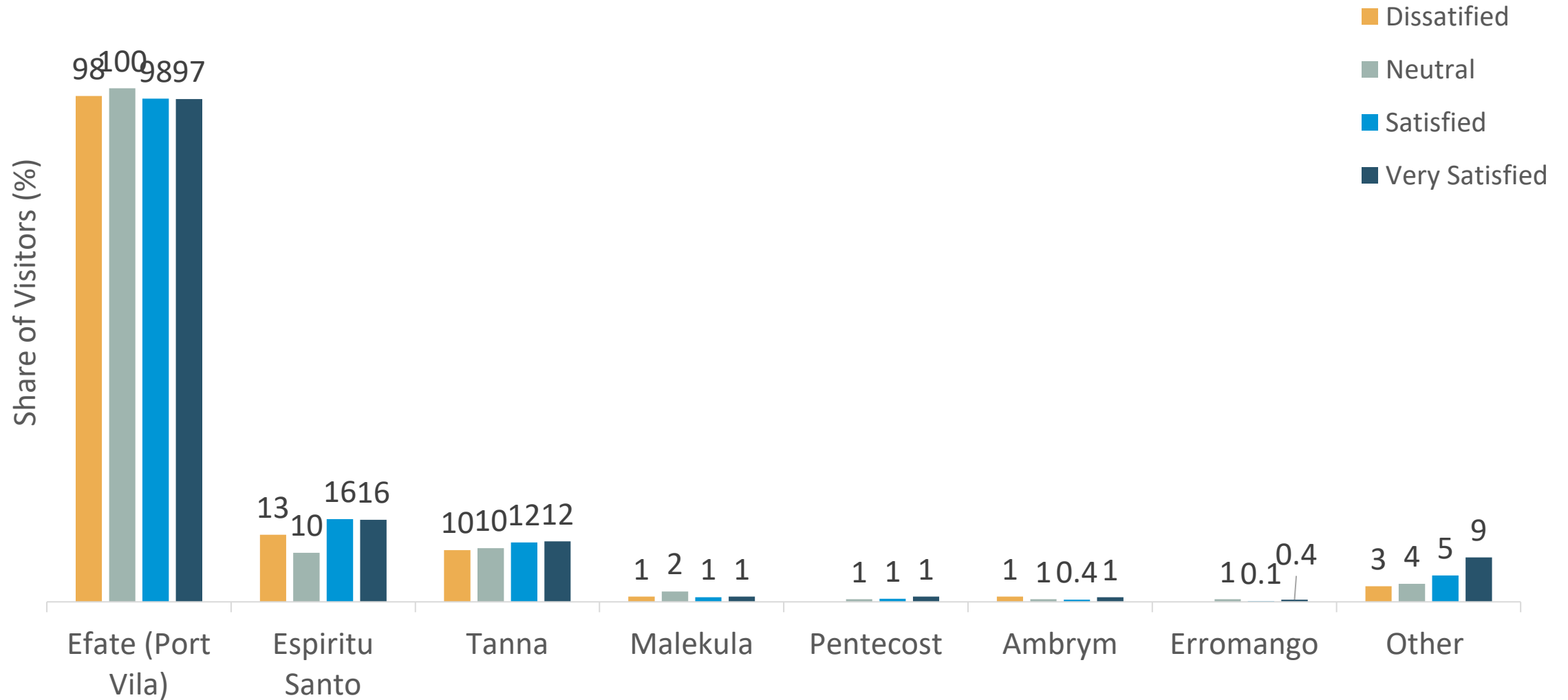
Note: Multiple responses, therefore total does not add up to 100%

# Very Satisfied and Satisfied visitors had a longer stay than Dissatisfied or Neutral visitors.



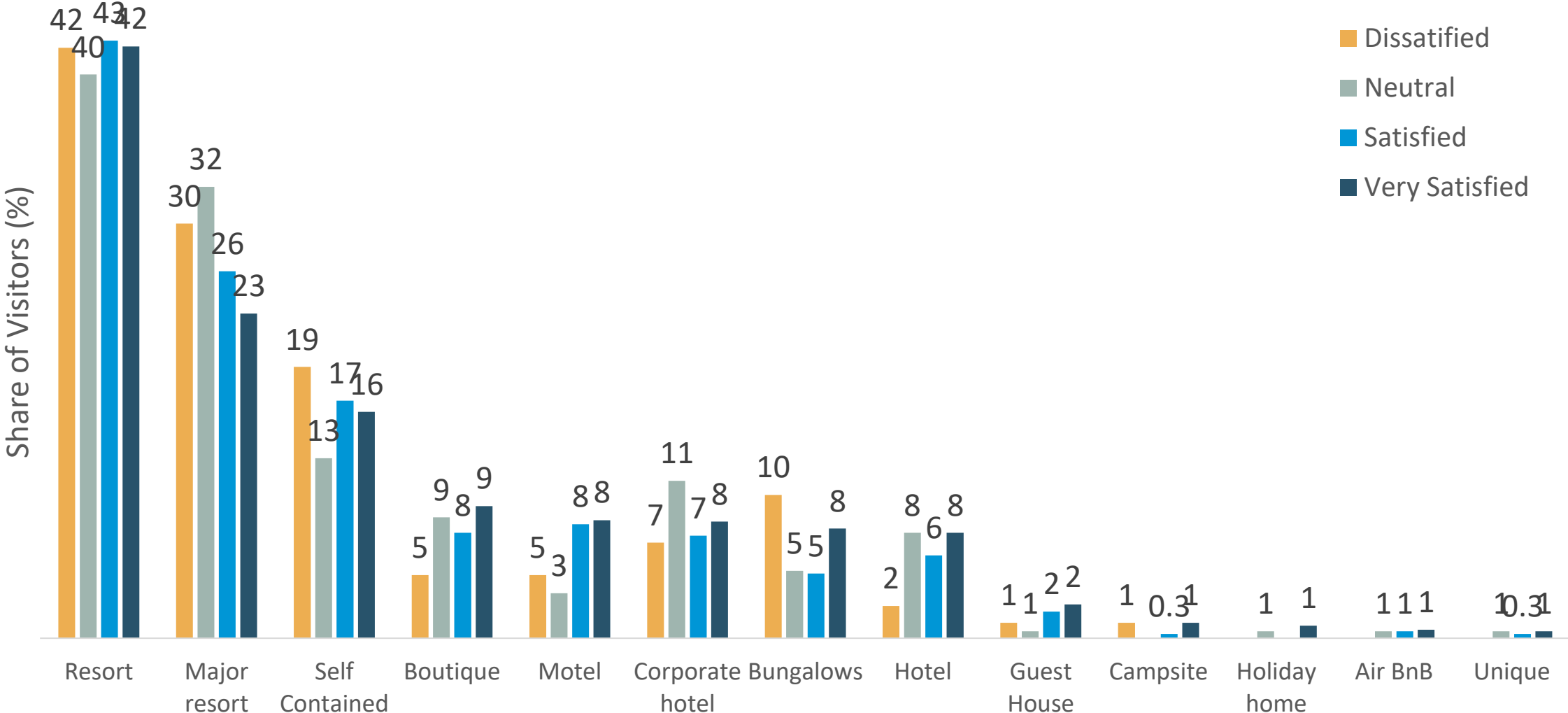
Note: 31 and 31+ days as outliers were removed for length of stay analysis

# Very Satisfied and Satisfied visitors are more likely to travel beyond Efate to Espiritu Santo and Tanna than Dissatisfied or Neutral visitors.



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

Nearly 40% of all NZ visitors stayed in resorts while in Vanuatu. Very Satisfied and Satisfied visitors are more likely to stay at Motels. Neutral visitors show a preference for Major Resorts and Corporate hotels. Dissatisfied visitors are more likely to stay in Self-contained accommodations and Bungalows than other groups.



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

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Visitor Spending  
and Impact

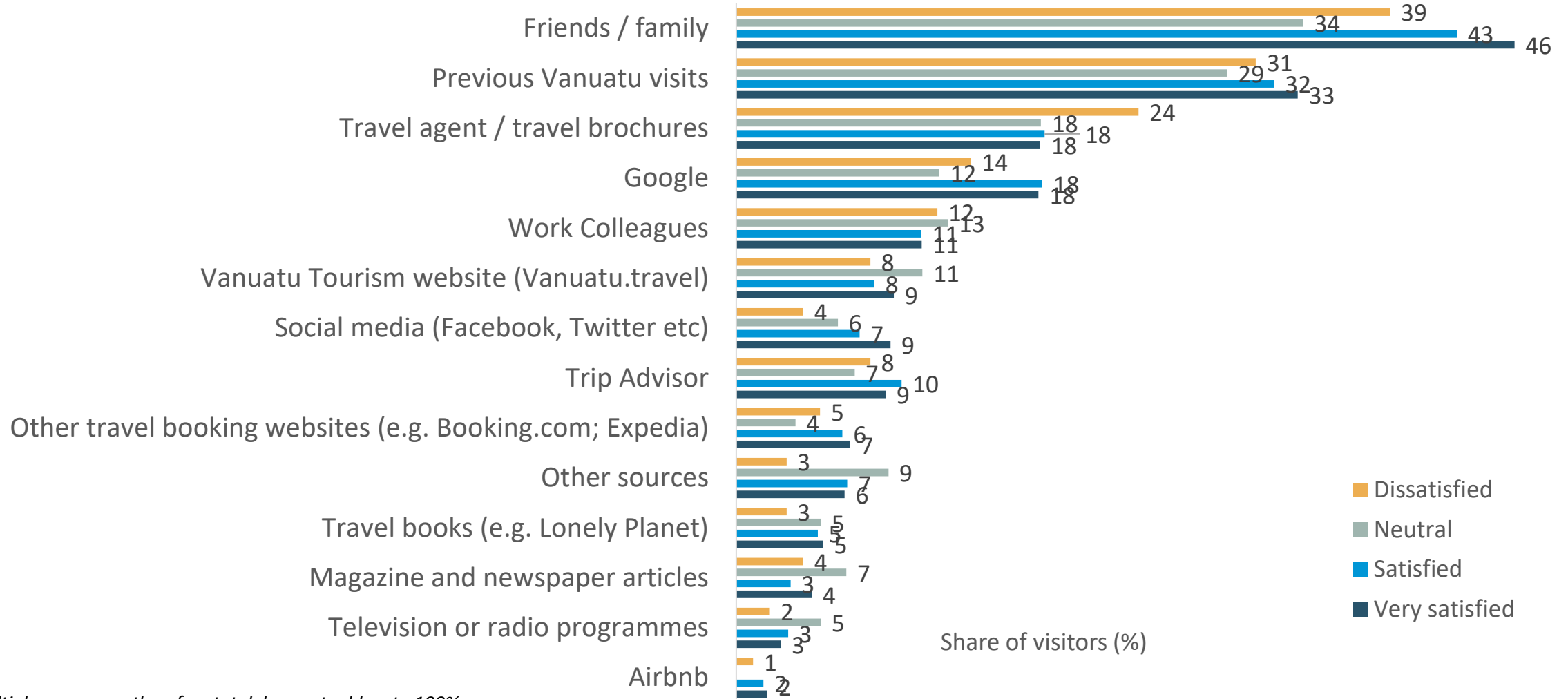


Visitor  
Satisfaction

Family and friends is the most common way to know about Vanuatu for NZ visitors. Very Satisfied and Satisfied visitors are more likely to search online channels for information e.g., google/Trip Advisor. Dissatisfied visitors tend to use travel agents/ travel brochures.

Q

## How did you find out about Vanuatu as a destination?

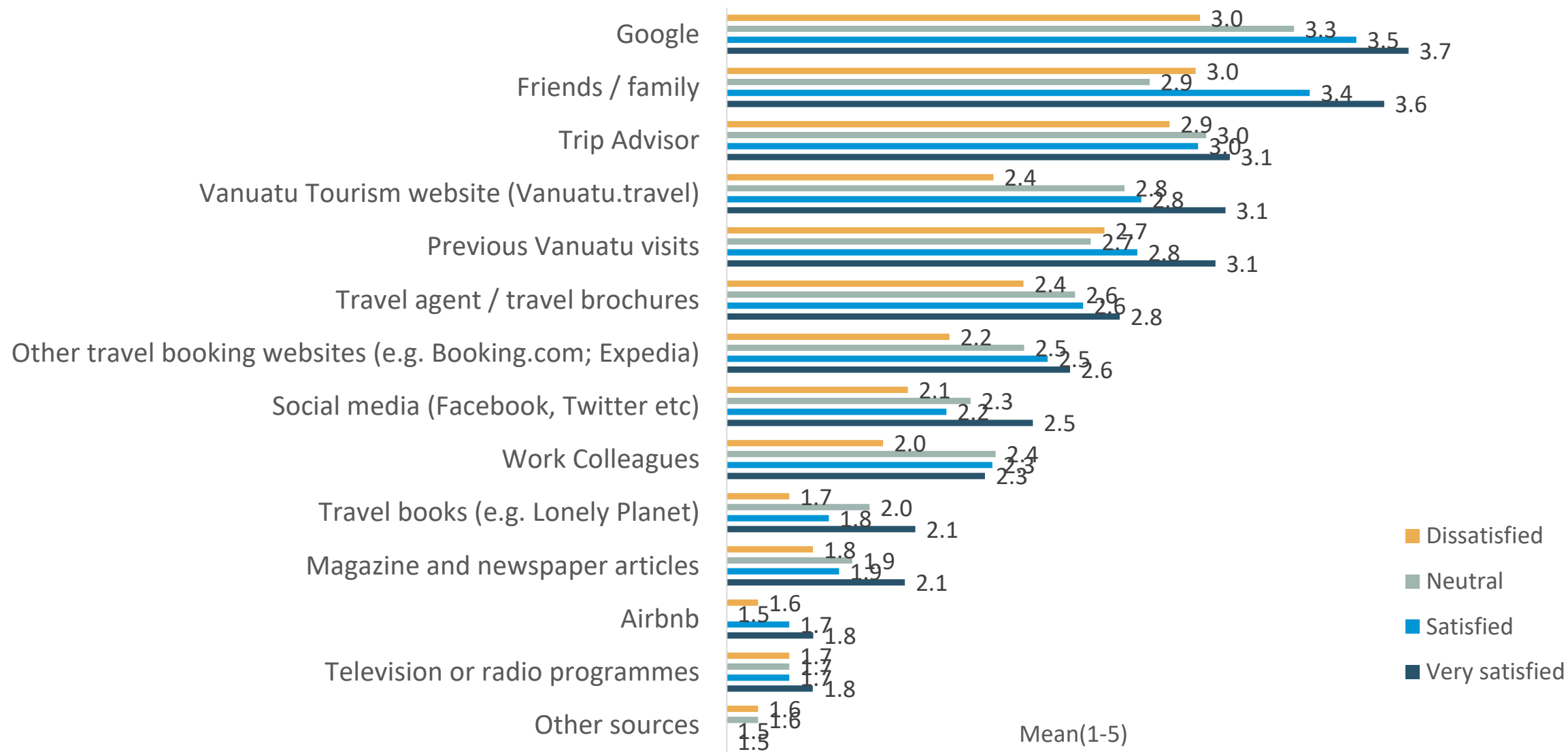


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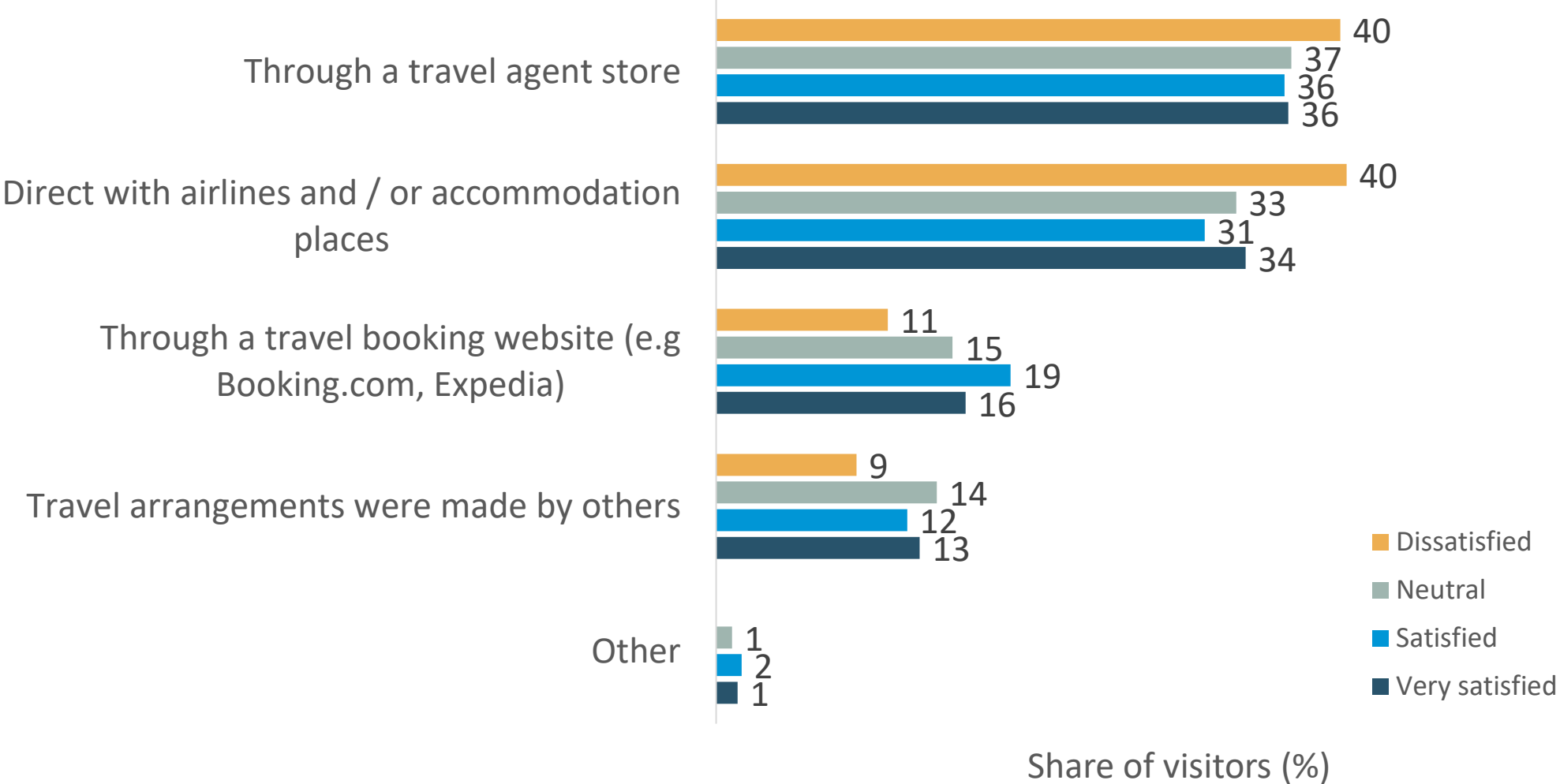
# Google search and friends/family are the most important information sources for NZ visitors to Vanuatu. Online channels are more important for Very Satisfied than other groups.

**Q** How important the following information sources were during your travel planning?



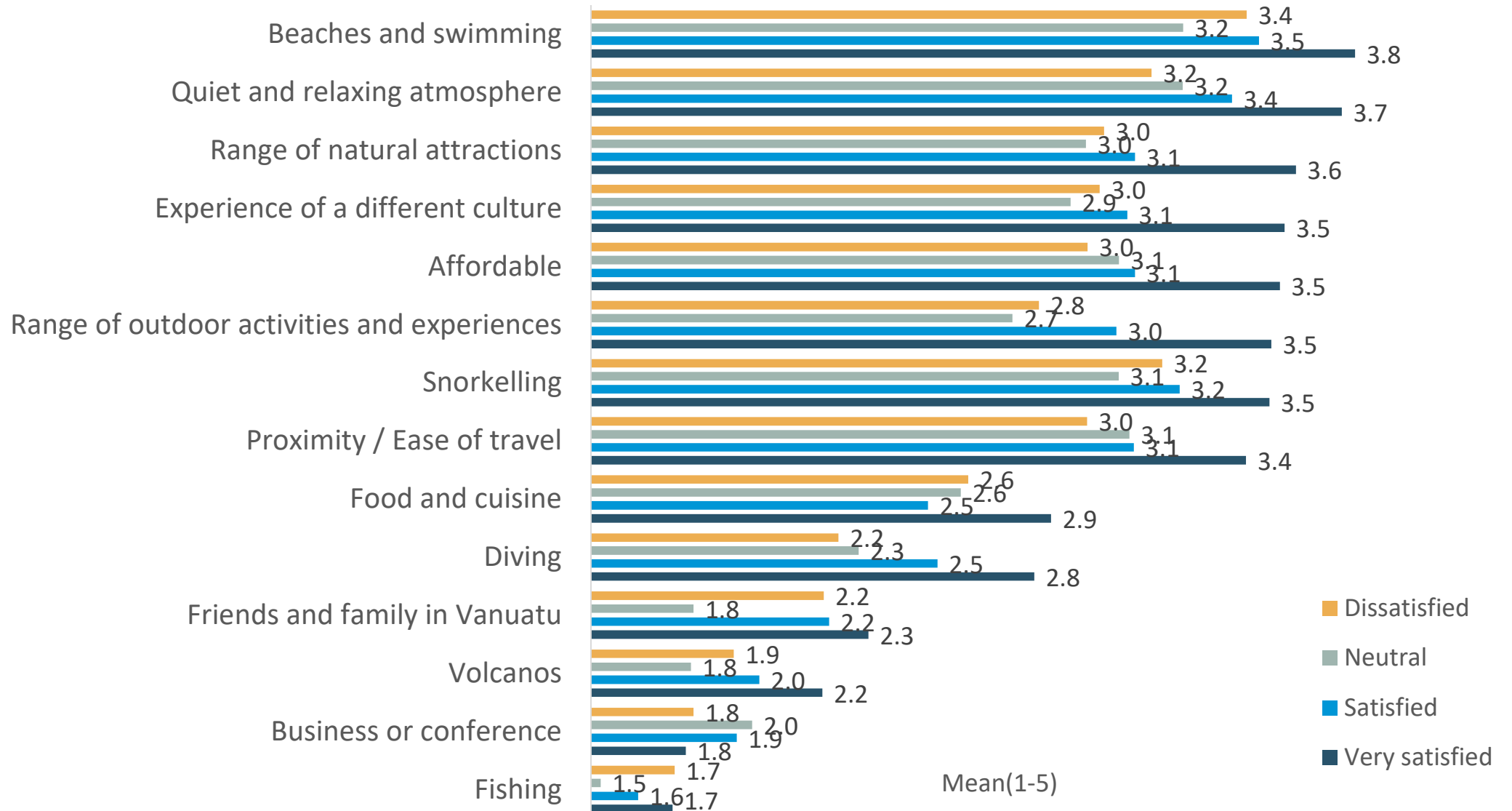
# Very Satisfied and Satisfied visitors are more likely to book through travel websites e.g. booking.com than Dissatisfied or Neutral visitors.

## Q How did you purchase your travel?



**Beach and swimming and Atmosphere are the most significant factors for NZ visitors to Vanuatu. Almost all factors except “fishing” & “business and conference” are more influential for Very Satisfied visitors.**

### Influential factors in decisions of travelling to Vanuatu



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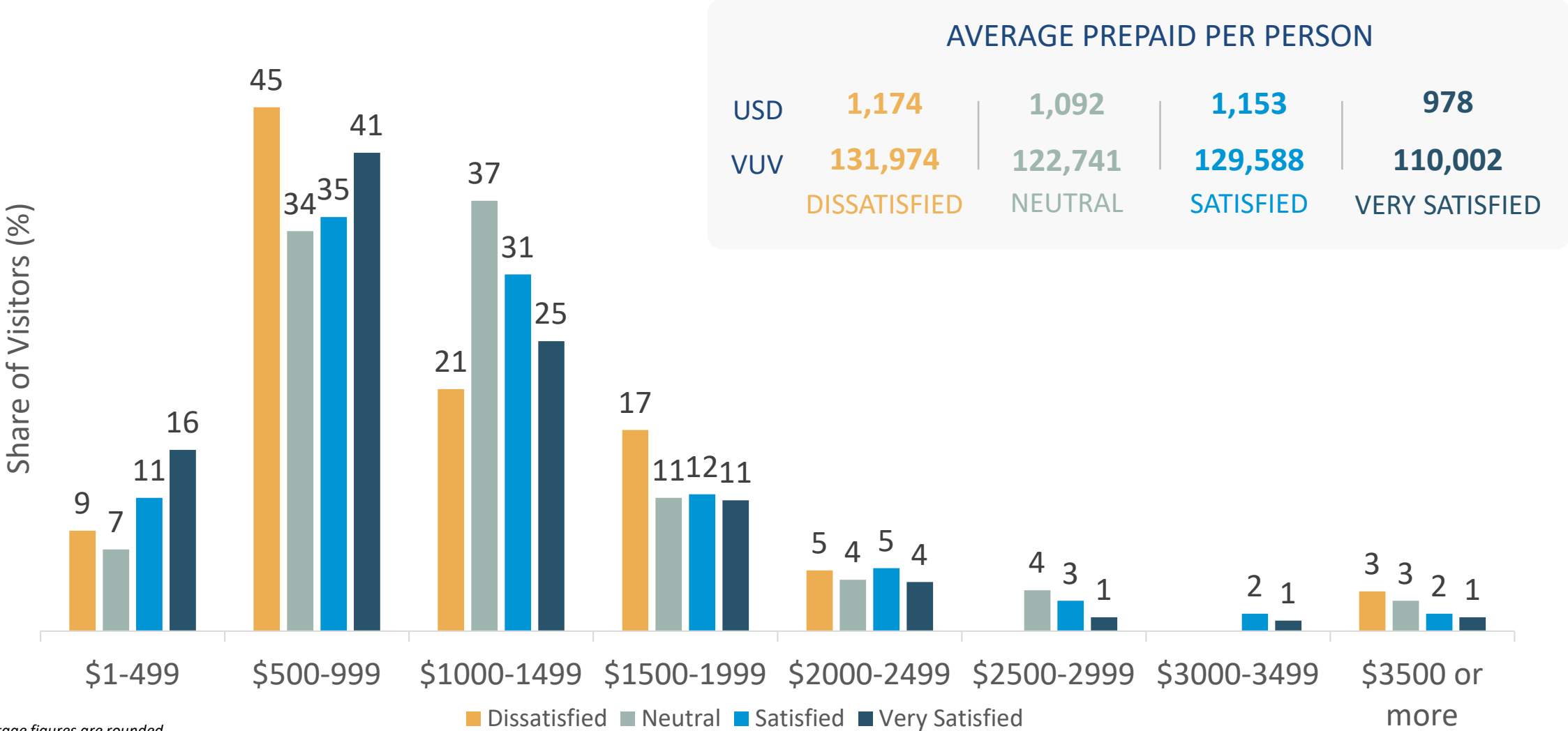


Visitor Spending  
and Impact



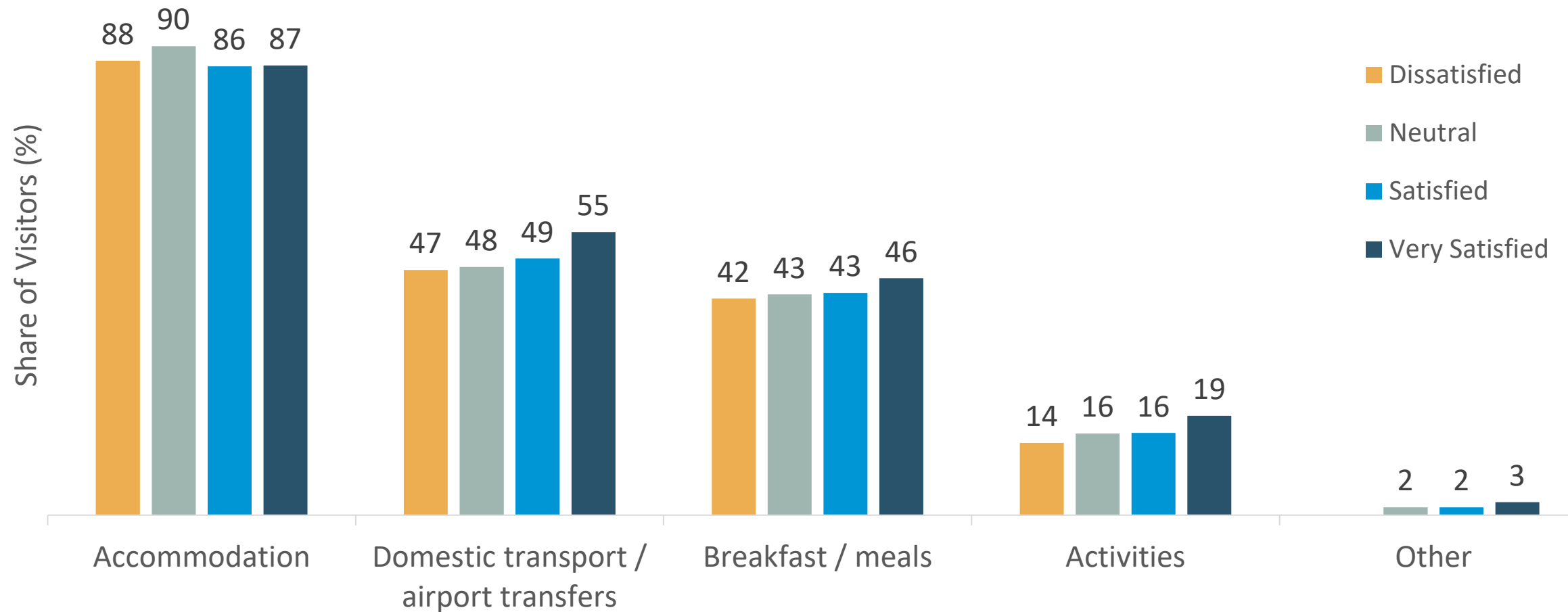
Visitor  
Satisfaction

# Dissatisfied visitors spend approximately 20% more prior to arrival than Very Satisfied visitors.



Note: Percentage figures are rounded

# Prepaid items: Very Satisfied visitors are likely to spend more on domestic transport, Breakfast, and activities but less on accommodation than other groups.



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

**In-country spend per day is similar between Very Satisfied, Satisfied, and Neutral visitors. Dissatisfied visitors spend more on food and beverage, local transport and domestic travel while in Vanuatu.**

|  | DISSATISFIED |          | NEUTRAL     |          | SATISFIED   |          | VERY SATISFIED |          |
|--|--------------|----------|-------------|----------|-------------|----------|----------------|----------|
|  | <u>US\$</u>  | <u>%</u> | <u>US\$</u> | <u>%</u> | <u>US\$</u> | <u>%</u> | <u>US\$</u>    | <u>%</u> |
| <b>Food &amp; Beverage</b>                   | 29           | 34       | 26          | 33       | 27          | 35       | 27             | 34       |
| <b>Accommodation</b>                         | 17           | 20       | 18          | 23       | 17          | 21       | 19             | 24       |
| <b>Retail</b>                                | 10           | 12       | 8           | 11       | 10          | 12       | 9              | 11       |
| <b>Tours</b>                                 | 6            | 7        | 6           | 8        | 6           | 8        | 7              | 8        |
| <b>Local Transport</b>                       | 7            | 8        | 6           | 7        | 6           | 7        | 6              | 7        |
| <b>Domestic Travel</b>                       | 8            | 9        | 5           | 6        | 4           | 6        | 5              | 6        |
| <b>Souvenirs</b>                             | 2            | 3        | 2           | 2        | 2           | 3        | 4              | 5        |
| <b>Entertainment, Internet &amp; Service</b> | 4            | 4        | 3           | 4        | 4           | 5        | 3              | 4        |
| <b>Duty Free</b>                             | 3            | 4        | 4           | 5        | 2           | 3        | 2              | 2        |
| <b>TOTAL</b>                                 | <b>88</b>    |          | <b>79</b>   |          | <b>79</b>   |          | <b>81</b>      |          |

**Economic Impact – Per Person and Total: Dissatisfied visitors’ impact per trip and per day is the highest of the four segments. They inject \$153/VT 17182 dollar more into the economy per trip than their very satisfied counterparts.**

|   | DISSATISFIED         | NEUTRAL              | SATISFIED            | VERY SATISFIED       |
|---|----------------------|----------------------|----------------------|----------------------|
| <b>Average Spend Prior to arrival</b>             | USD/VT               | USD/VT               | USD/VT               | USD/VT               |
| Per Person Per Trip                               | 1,174/131,974        | 1,092/122,741        | 1,153/129,588        | 978/110,002          |
| <i>Flowing into local economy rate est. 62.5%</i> |                      |                      |                      |                      |
| Per Person Per Trip                               | 734/82,484           | 682/76,713           | 720/80,992           | 612/68,752           |
| Per Person per Day                                | 91/10,246            | 91/10,174            | 87/9,735             | 73/8,253             |
| <b>Average Local Spend</b>                        |                      |                      |                      |                      |
| <i>Length of Study (nights)</i>                   | 8.1 nights           | 7.5 nights           | 8.3 nights           | 8.3 nights           |
| Per Person Per Trip                               | 707/79,475           | 597/67,132           | 655/73,683           | 676/76,026           |
| Per Person per Day                                | 88/9,873             | 79/8,904             | 79/8,856             | 81/9,127             |
| <b>Total Economic Impact-Per Trip</b>             | <b>1,441/161,959</b> | <b>1,280/143,846</b> | <b>1,376/154,675</b> | <b>1,288/144,777</b> |
| <b>Total Economic Impact-Per Day</b>              | <b>179/20,119</b>    | <b>170/19,078</b>    | <b>165/18,591</b>    | <b>155/17,380</b>    |

Note: Average exchange rate from 2018 to 2020 applied for VUV to USD.



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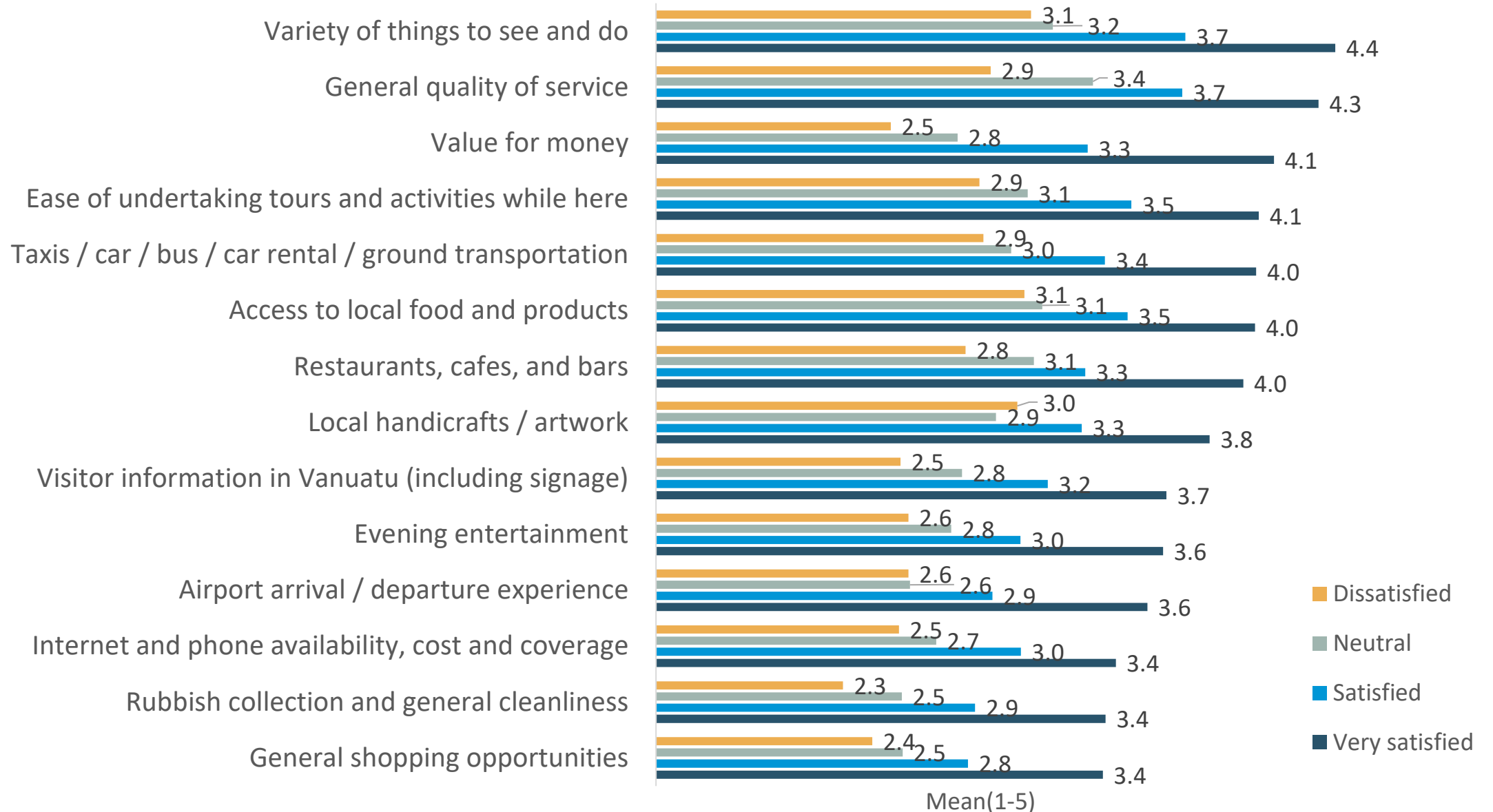
Visitor Spending  
and Impact



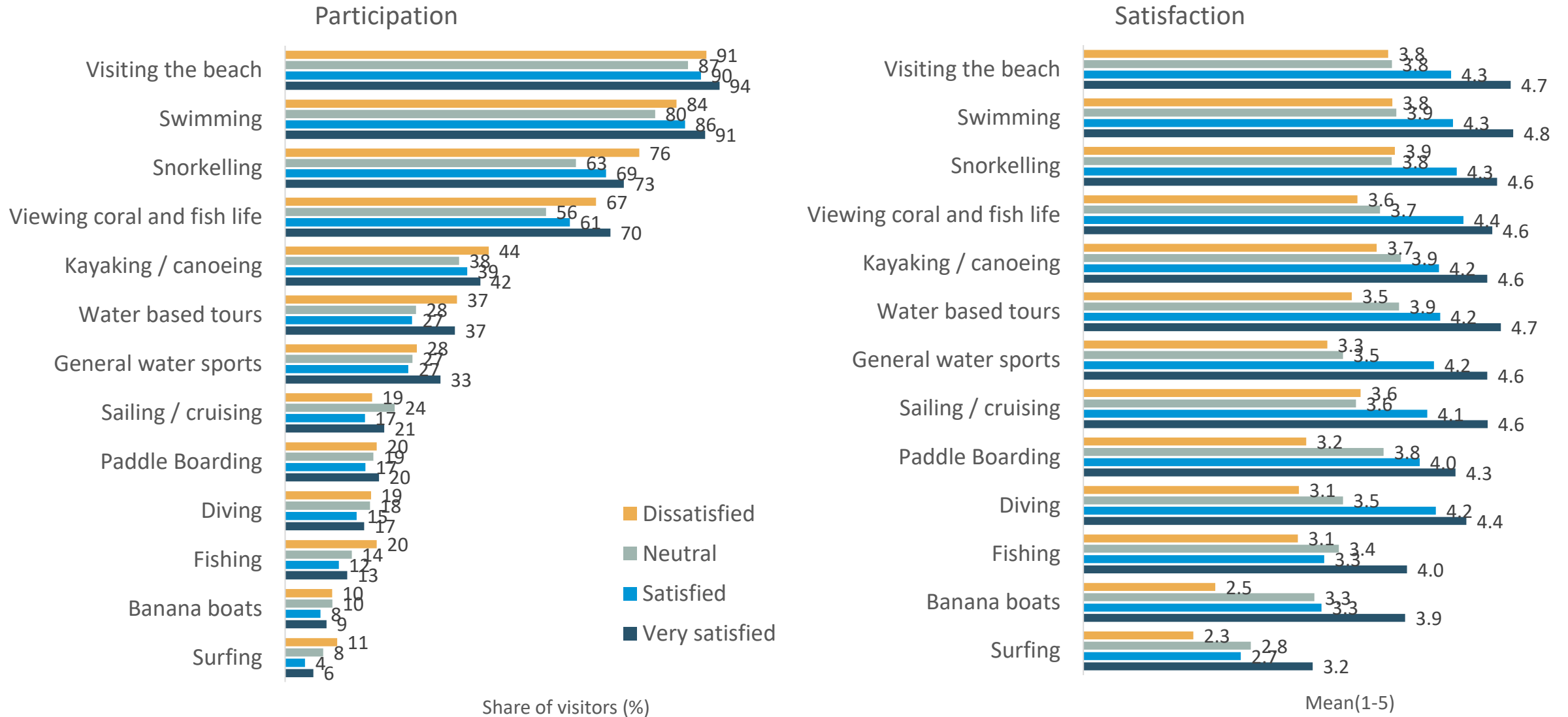
Visitor  
Satisfaction

# Very satisfied visitors are far more satisfied with a range of travel experiences.

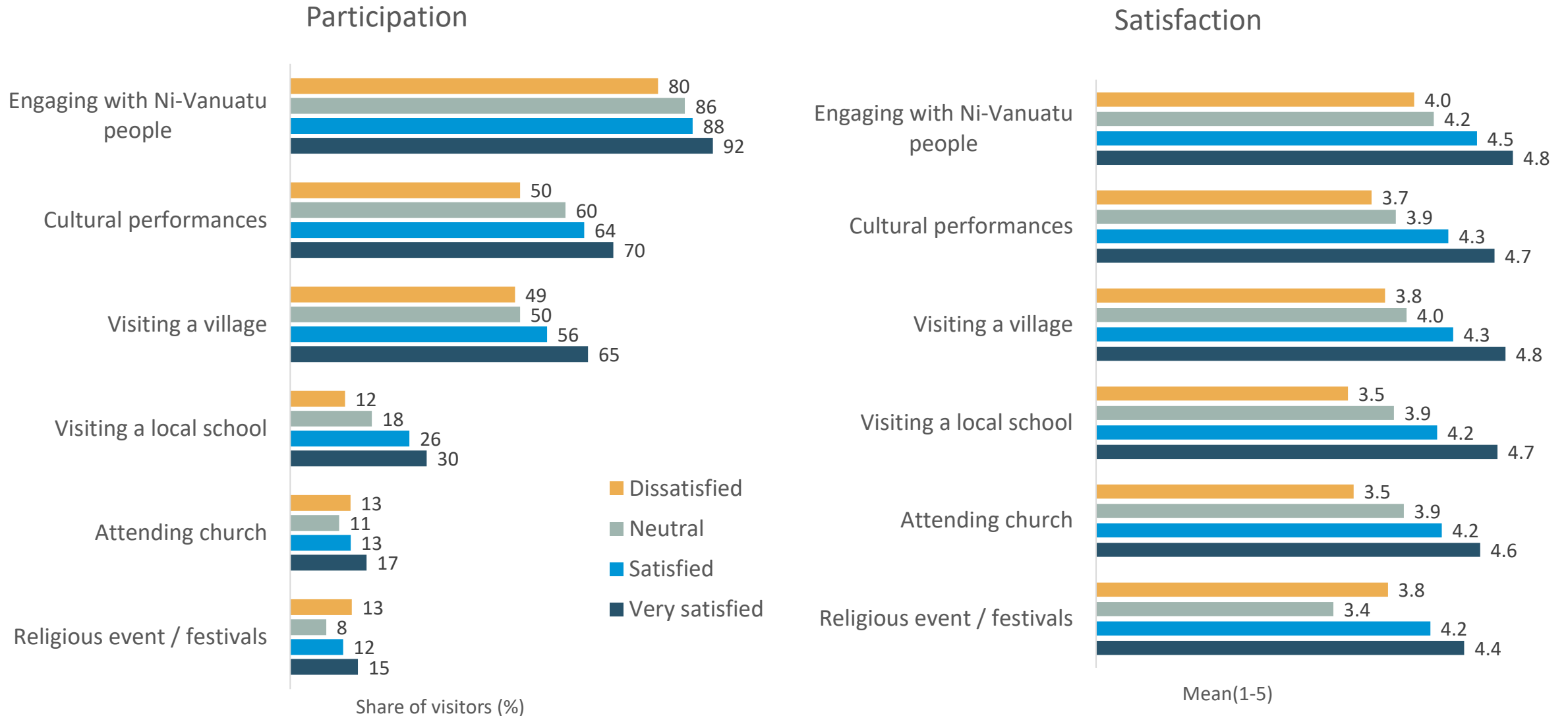
## Satisfaction with services and facilities in Vanuatu



**Very Satisfied visitors have the highest participation rate and satisfaction level in most water-based activities. Dissatisfied visitors have the second highest participation rate in most water activities but are least satisfied.**

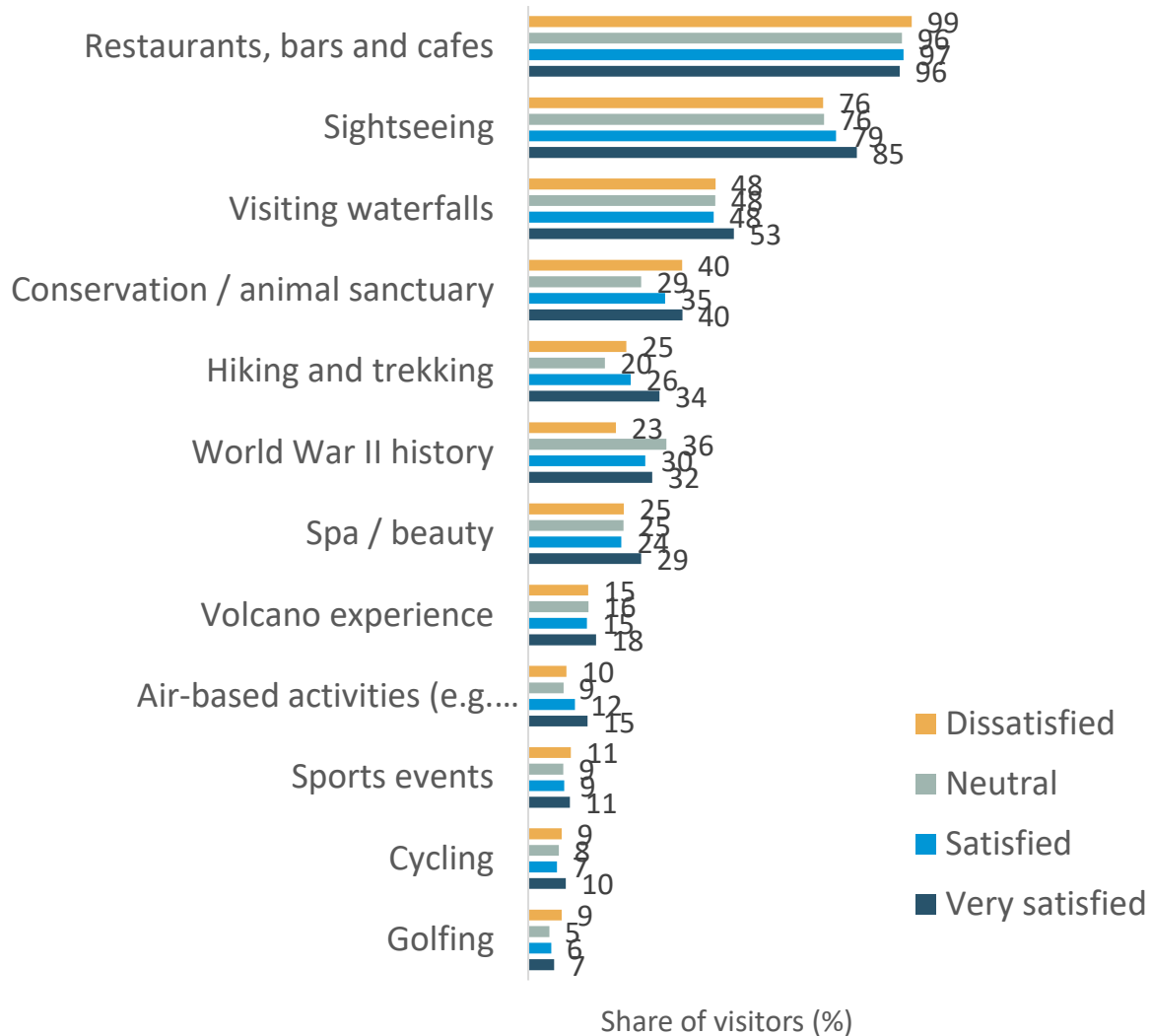


# Very Satisfied visitors exhibit higher levels of participation in, and satisfaction with, cultural experiences.

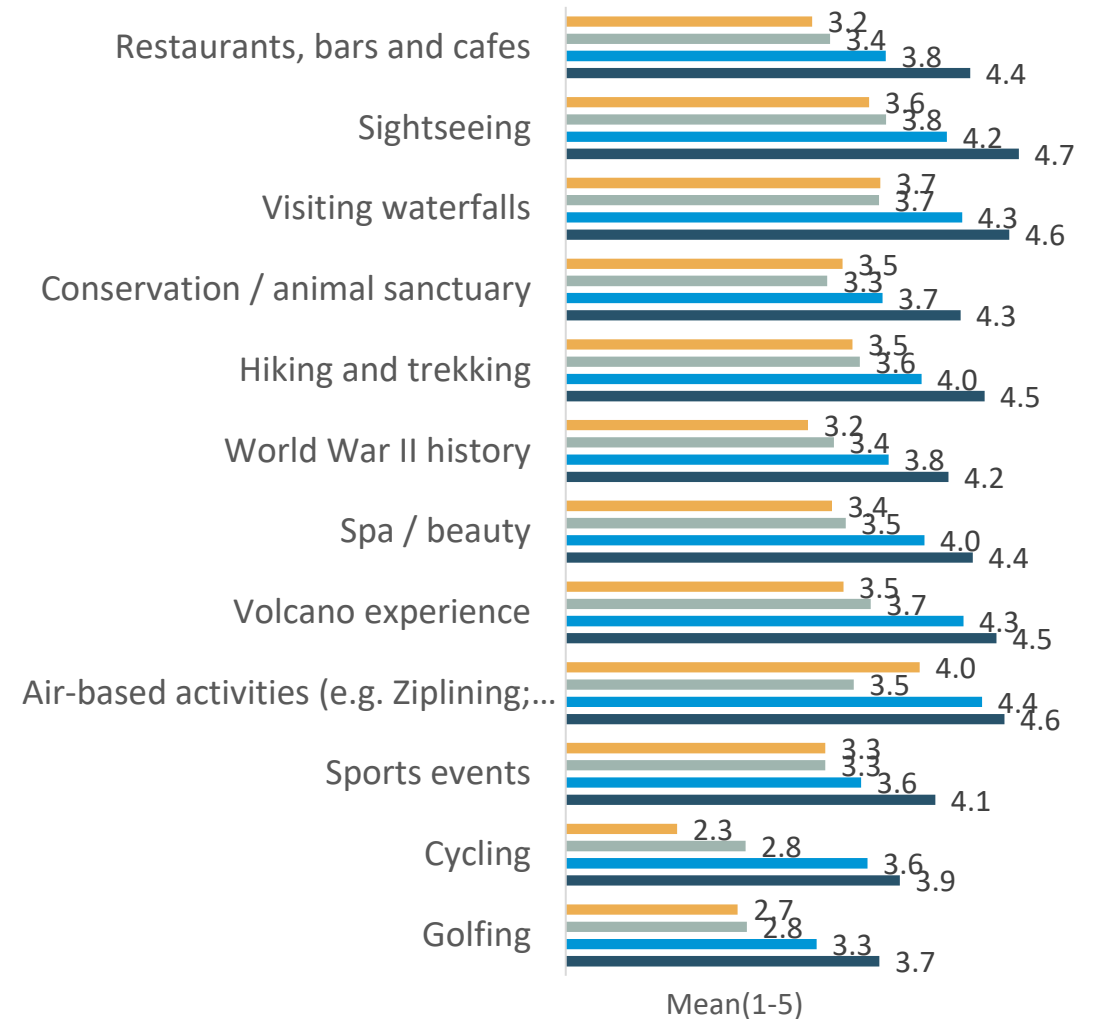


# Very satisfied visitors have relatively high participation in most land-based activities; and their levels of satisfaction are higher than other segments.

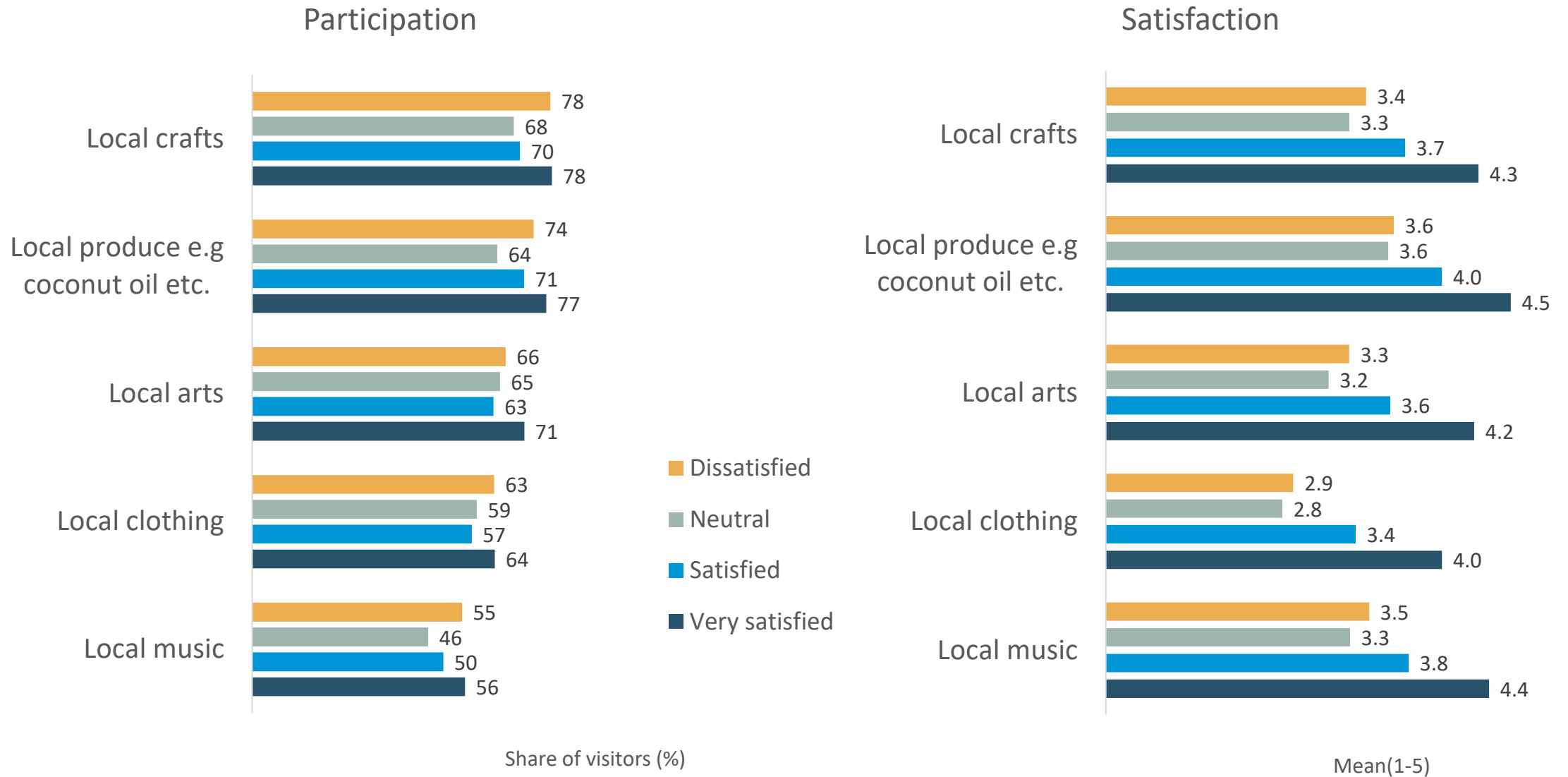
Participation



Satisfaction

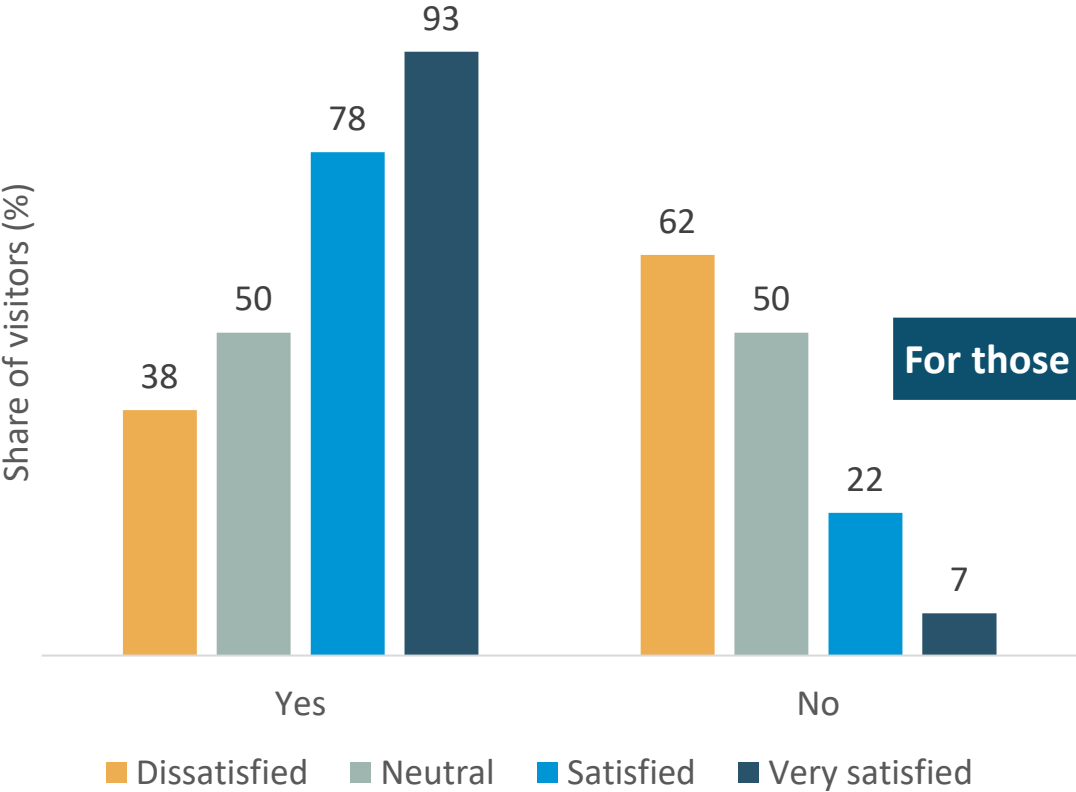


**Very satisfied visitors are more likely to participate in shopping activities, their satisfaction with shopping tends to be considerably higher. Dissatisfied visitors have the second highest participation in shopping activities, but are less satisfied.**



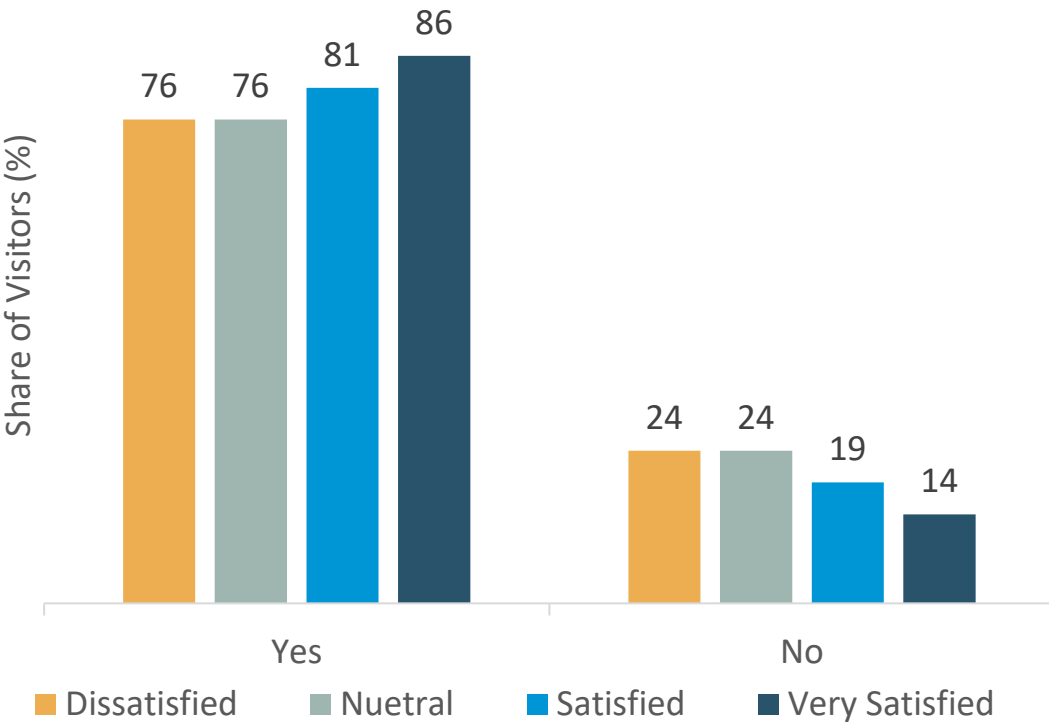
**Very Satisfied visitors have significantly higher willingness to return to Vanuatu.  
Willingness to visit outer islands on the next visit is relatively consistent across all groups.**

**Willingness to return**

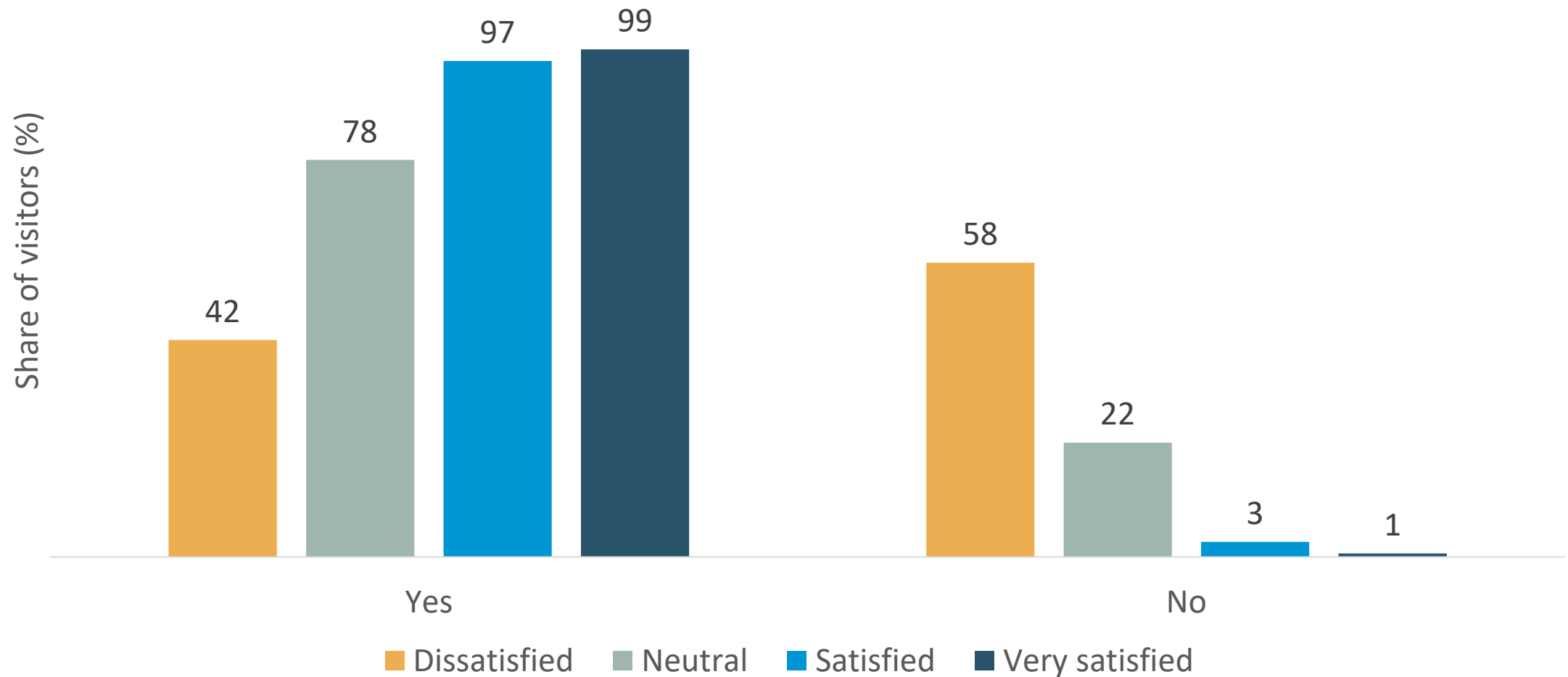


**For those who said "yes" →**

**Willingness to Visit Outer Islands for Next Trip**



**Both Very Satisfied visitors and Satisfied visitors exhibit a high level of willingness to recommend Vanuatu to others. The willingness to recommend among the dissatisfied segment falls to 42%.**





# Thank you

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