

Vanuatu

INTERNATIONAL VISITOR SURVEY

Australian 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 Australian (AU) visitors to Vanuatu and provide insights into visitor satisfaction. The IVS covers visitors aged 18+.
- Based on the satisfaction level of visitors' overall experience in Vanuatu, four segments are compared: Very satisfied visitors (labelled 'Very satisfied'), satisfied visitors ('Satisfied'), neutral visitors ('Neutral') and, very dissatisfied and dissatisfied visitors ('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

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

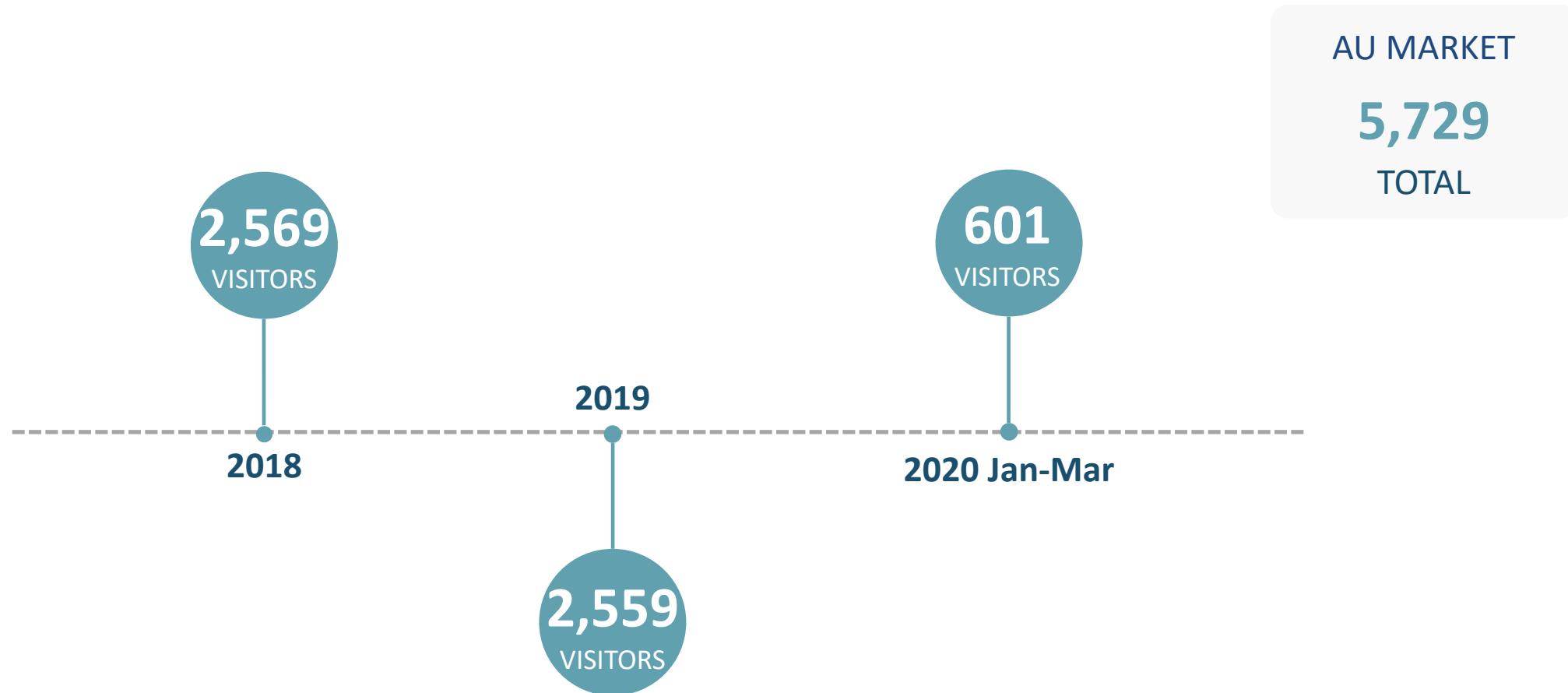


Visitor Spending
and Impact

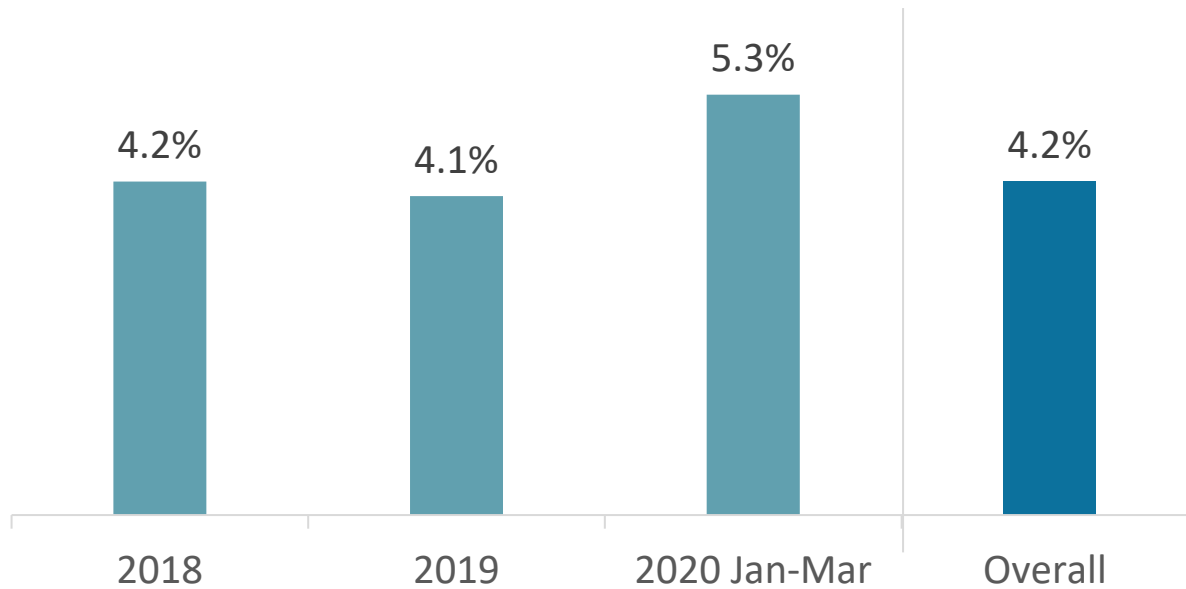


Visitor
Satisfaction

The number of surveyed AU visitors from 2018 January to 2020 March is 5729 in total.



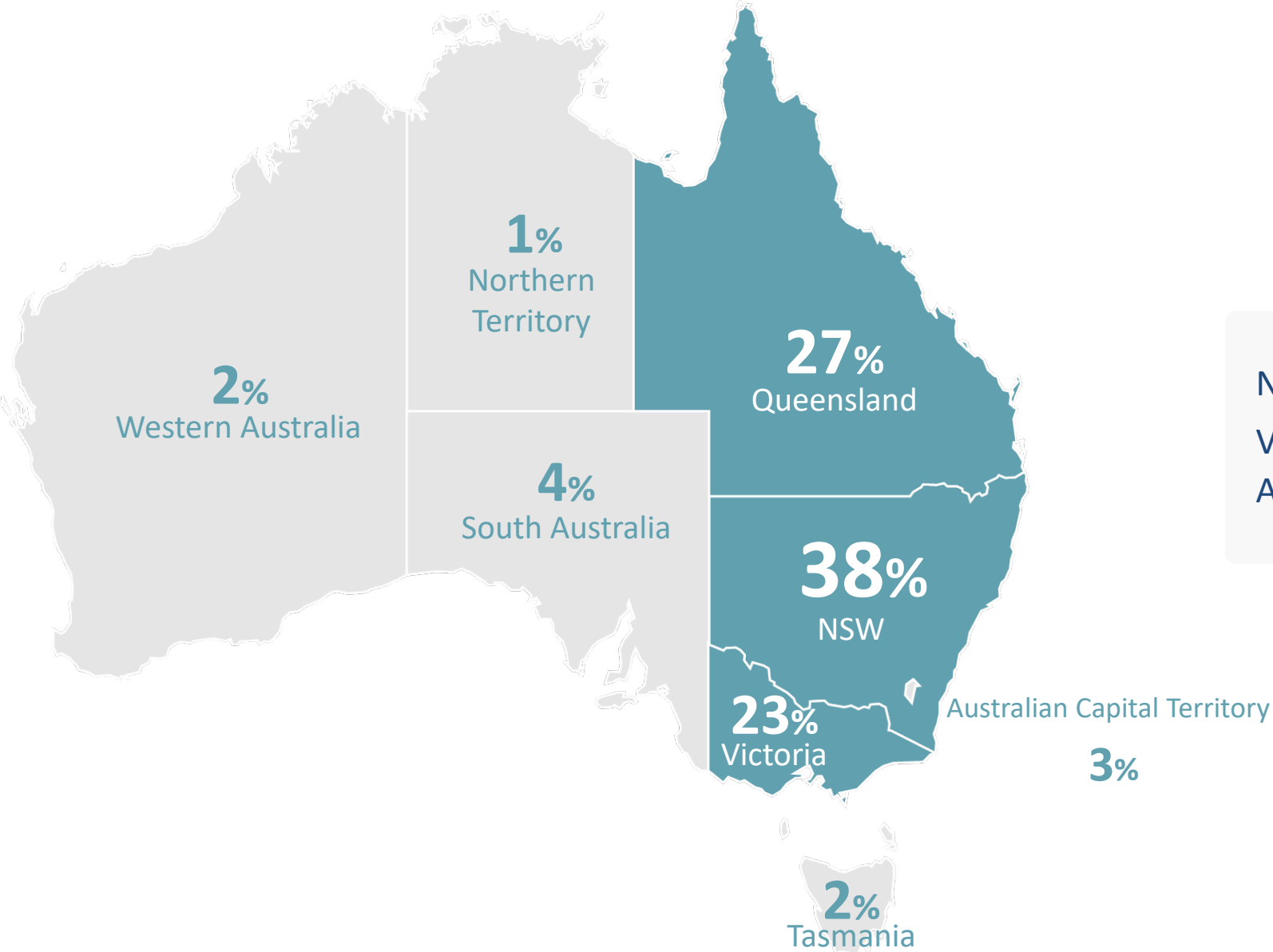
The percentage of AU IVS respondents relative to AU actual arrivals to Vanuatu by year.



	<u>AU</u> <u>ACTUAL ARRIVALS</u>	<u>AU IVS</u> <u>RESPONDENTS</u>	<u>%</u>
2018	60616	2569	4.2
2019	63122	2559	4.1
2020 Jan-Mar	11248	601	5.3
Overall	134986	5729	4.2

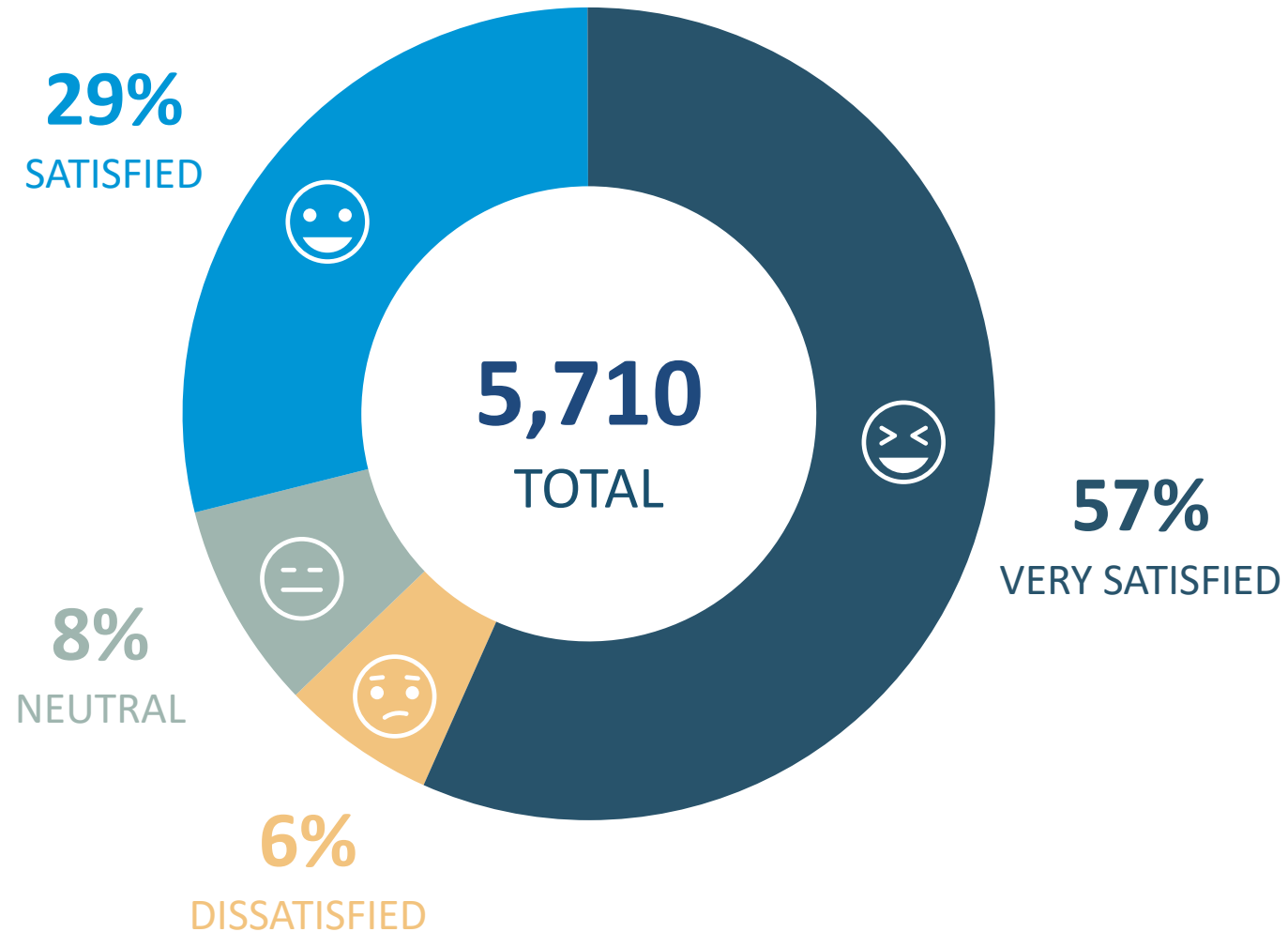
*IVS covers visitors aged 18 plus

Visitors from New South Wales make up the largest part of the AU market.



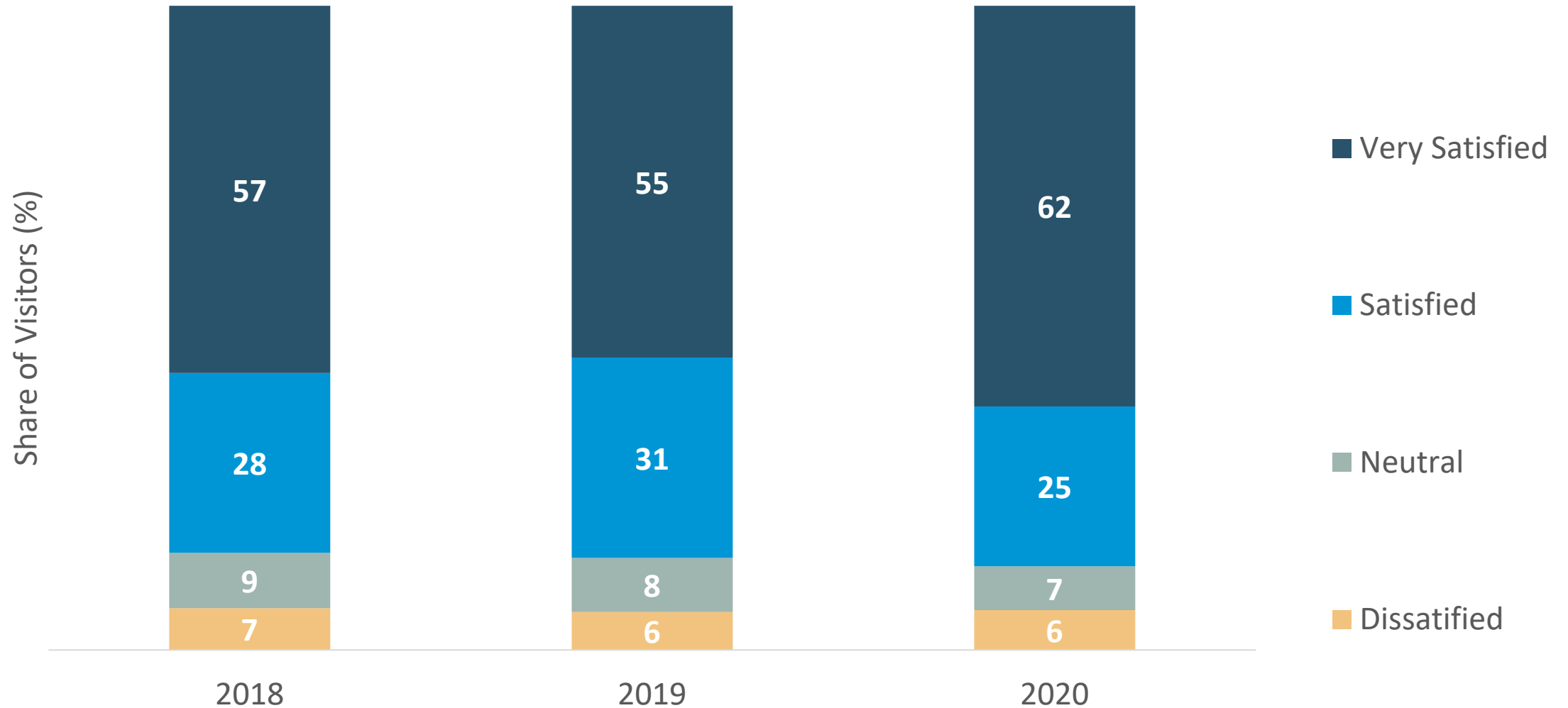
New South Wales, Queensland and Victoria make up **88%** of all the Australian market to Vanuatu.

IVS Jan. 2018 – Mar. 2020 : Levels of reported satisfaction, 86% of AU visitors are satisfied/very satisfied with their visit to Vanuatu.



Note: Reported satisfaction contains a valid sample of 5710, missing value 19.

The percentage of AU visitors who say they were Very Satisfied or Satisfied with their visit has remained fairly constant over the period (85% - 87%).



Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

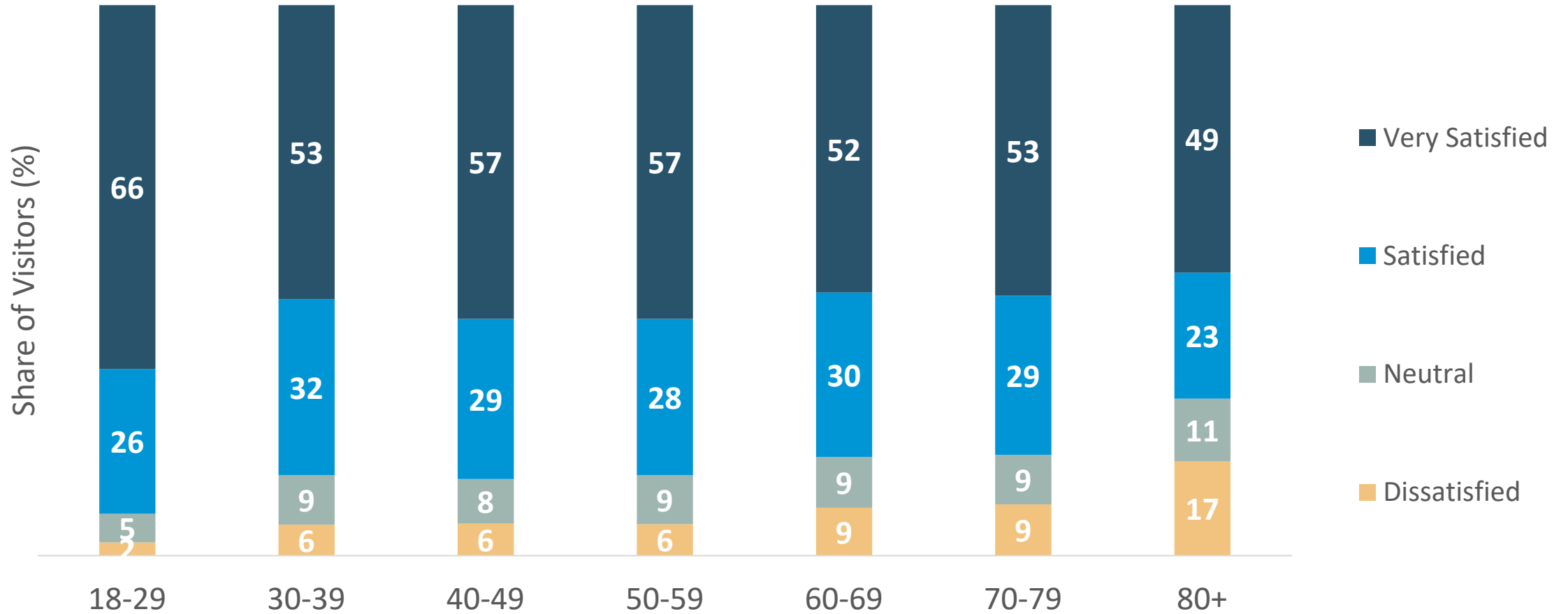


Visitor Spending
and Impact

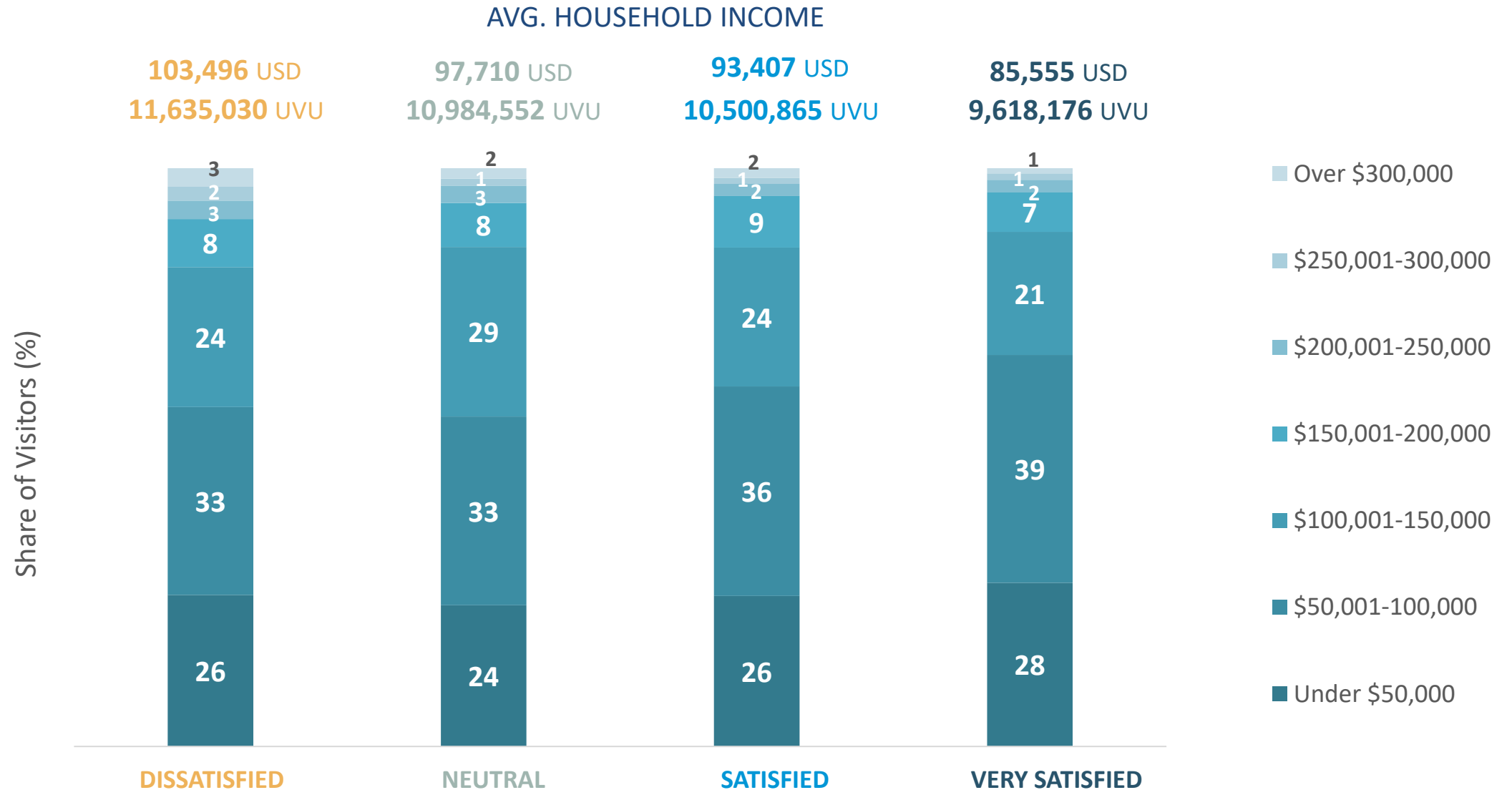


Visitor
Satisfaction

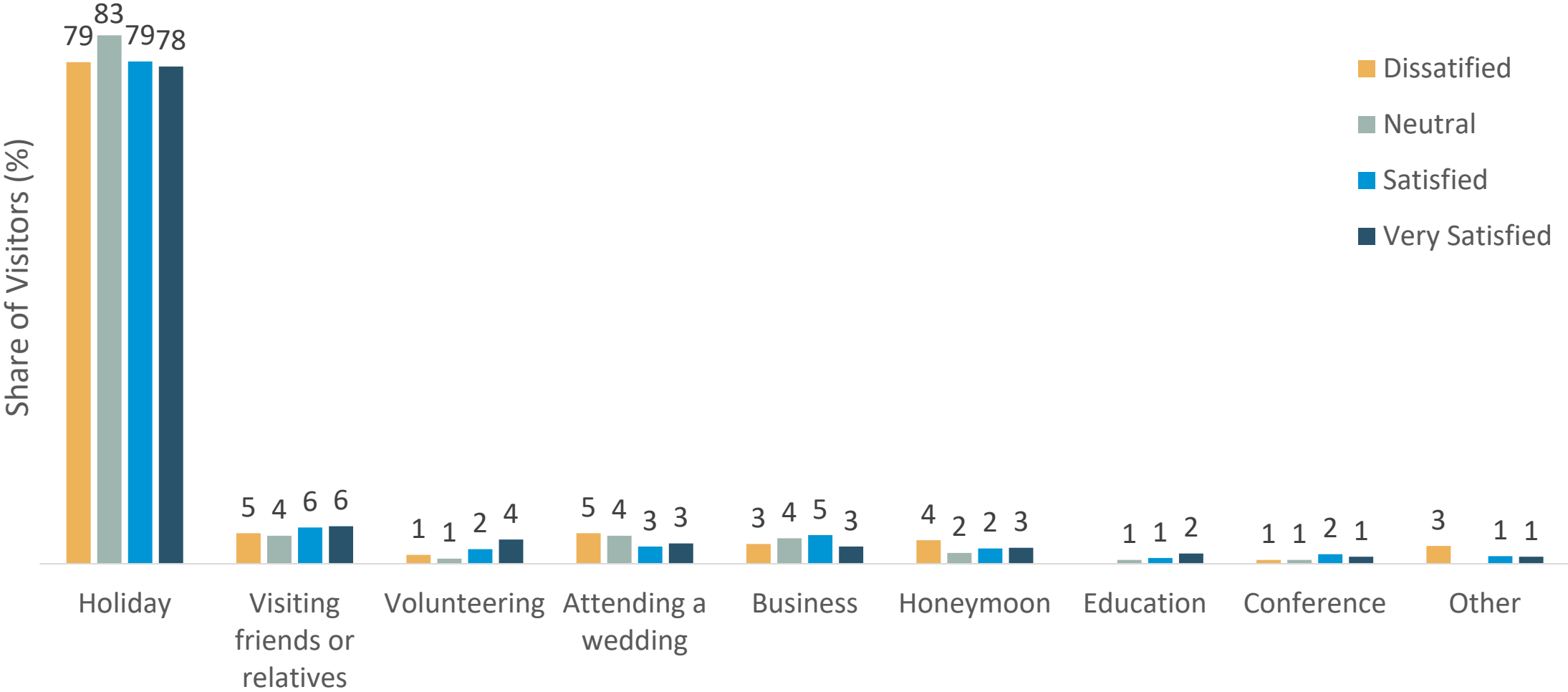
AU visitors aged 18-29 years exhibit the highest levels of Satisfaction. The overall percentage of visitors who are satisfied/very satisfied declines with age.



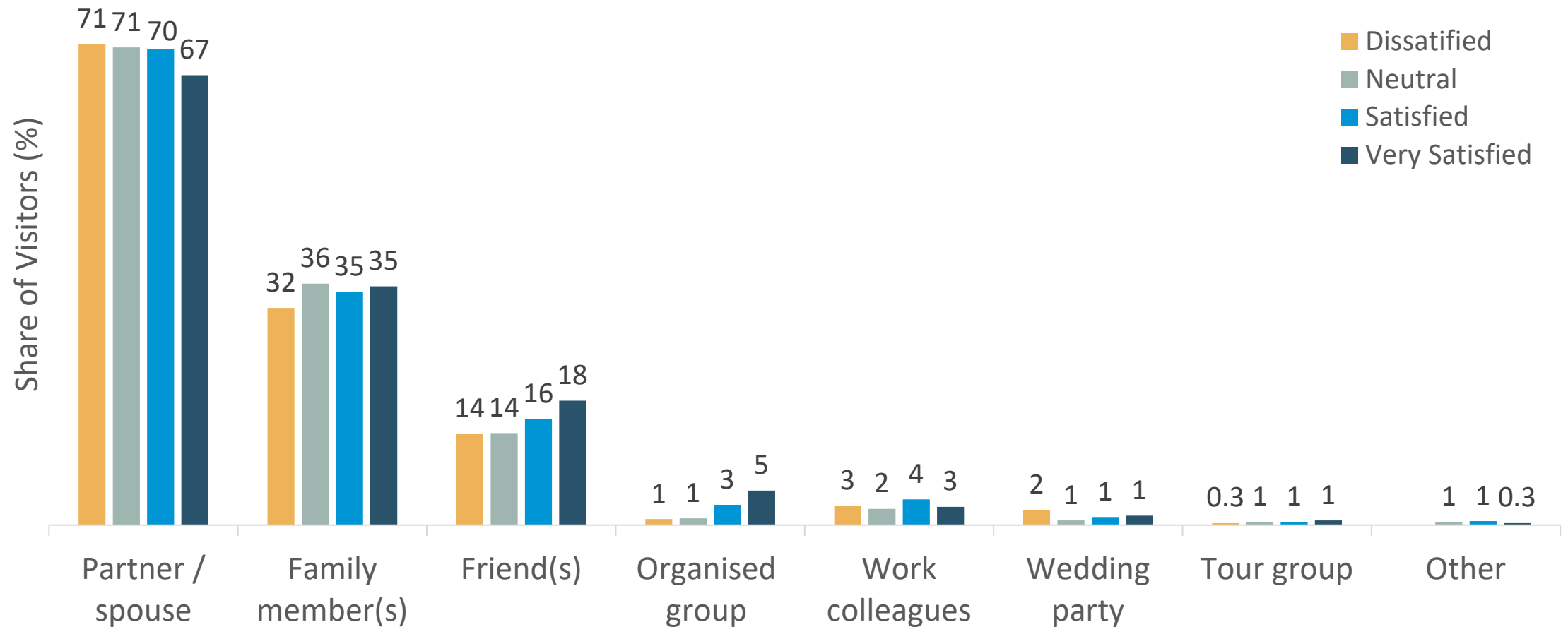
The average household income for Very satisfied and Satisfied visitors is considerably lower than that of Dissatisfied or Neutral visitors.



All groups of AU visitors indicate Holiday as their main purpose of visit. Very Satisfied and Satisfied visitors exhibit a slightly higher tendency to be on VFR visits. Very satisfied visitors also more likely to be ‘volunteering’.

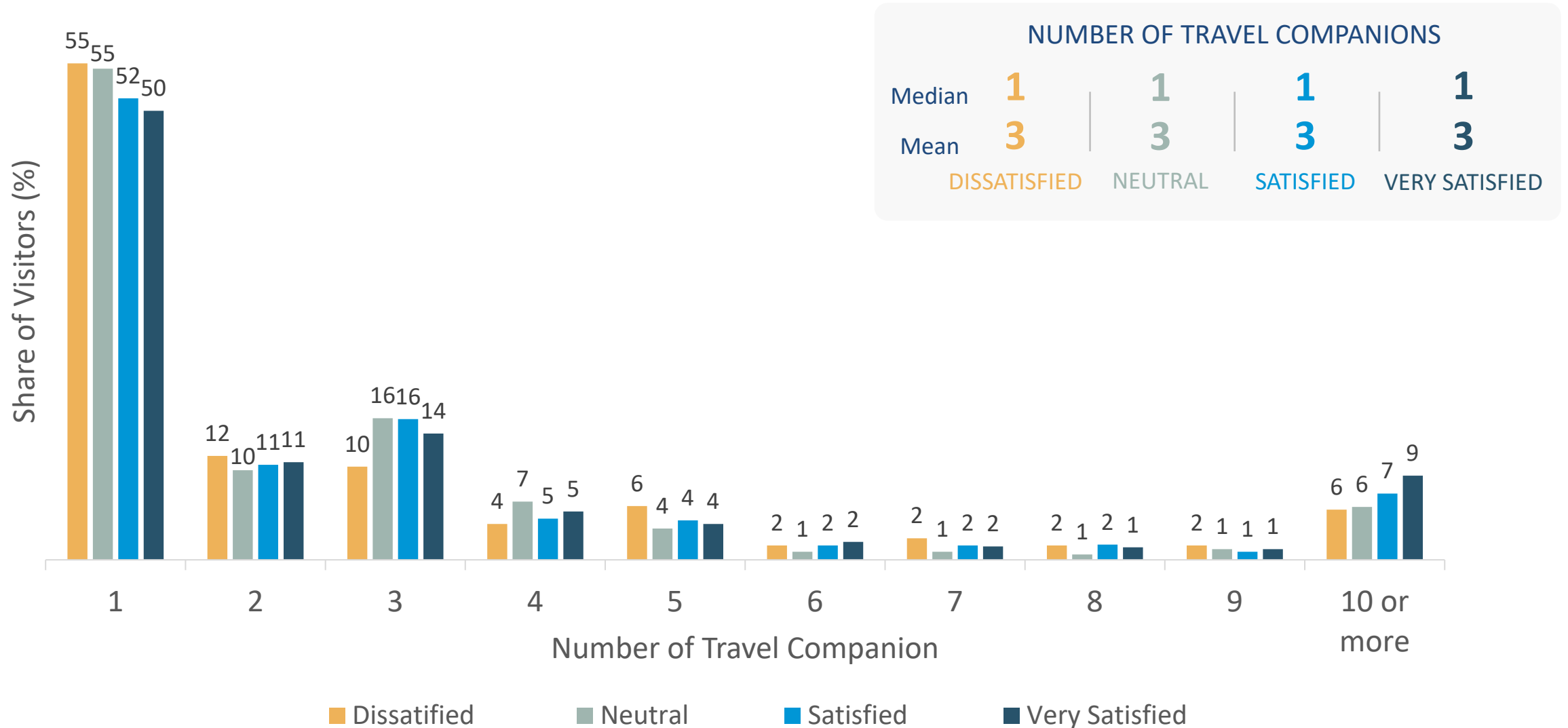


Very Satisfied AU visitors are more likely than other segments to travel with friends and organised groups as their travel companions.

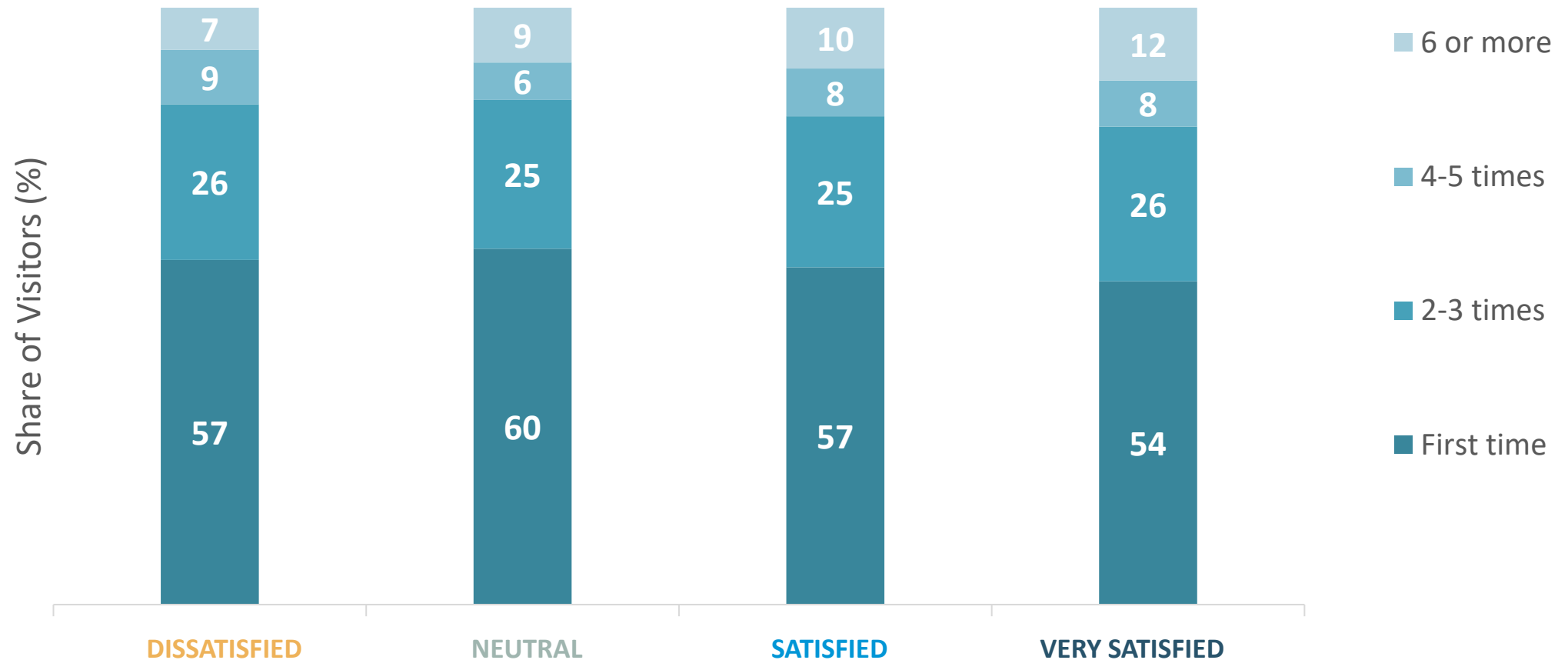


Note: Reported visitors who have a travel companion/s sample 4997. Multiple responses, therefore total does not add up to 100%

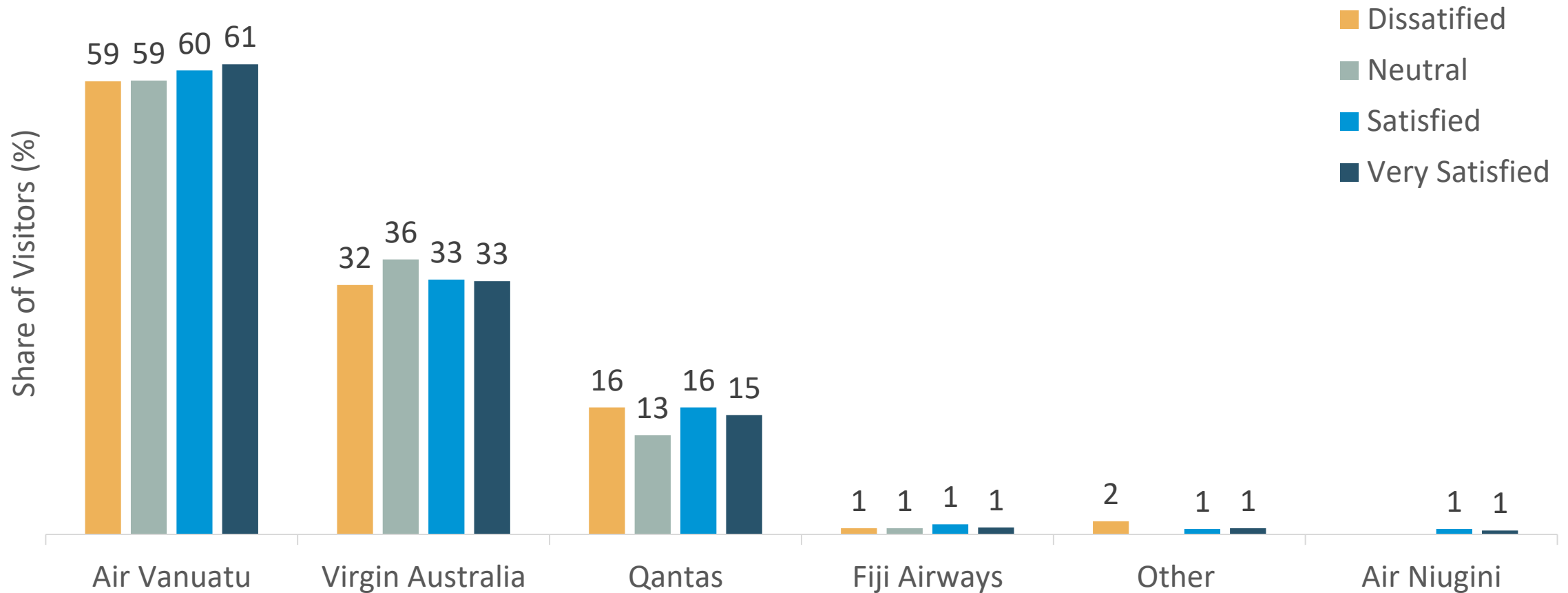
Very Satisfied and Satisfied AU visitors are more likely to have more than one travel companion (s). The average travel group size is similar across all satisfaction segments.



Over 46% of Very Satisfied AU visitors are repeat visitors to Vanuatu. Neutral visitors are more likely to be visiting for the first time than other segments.

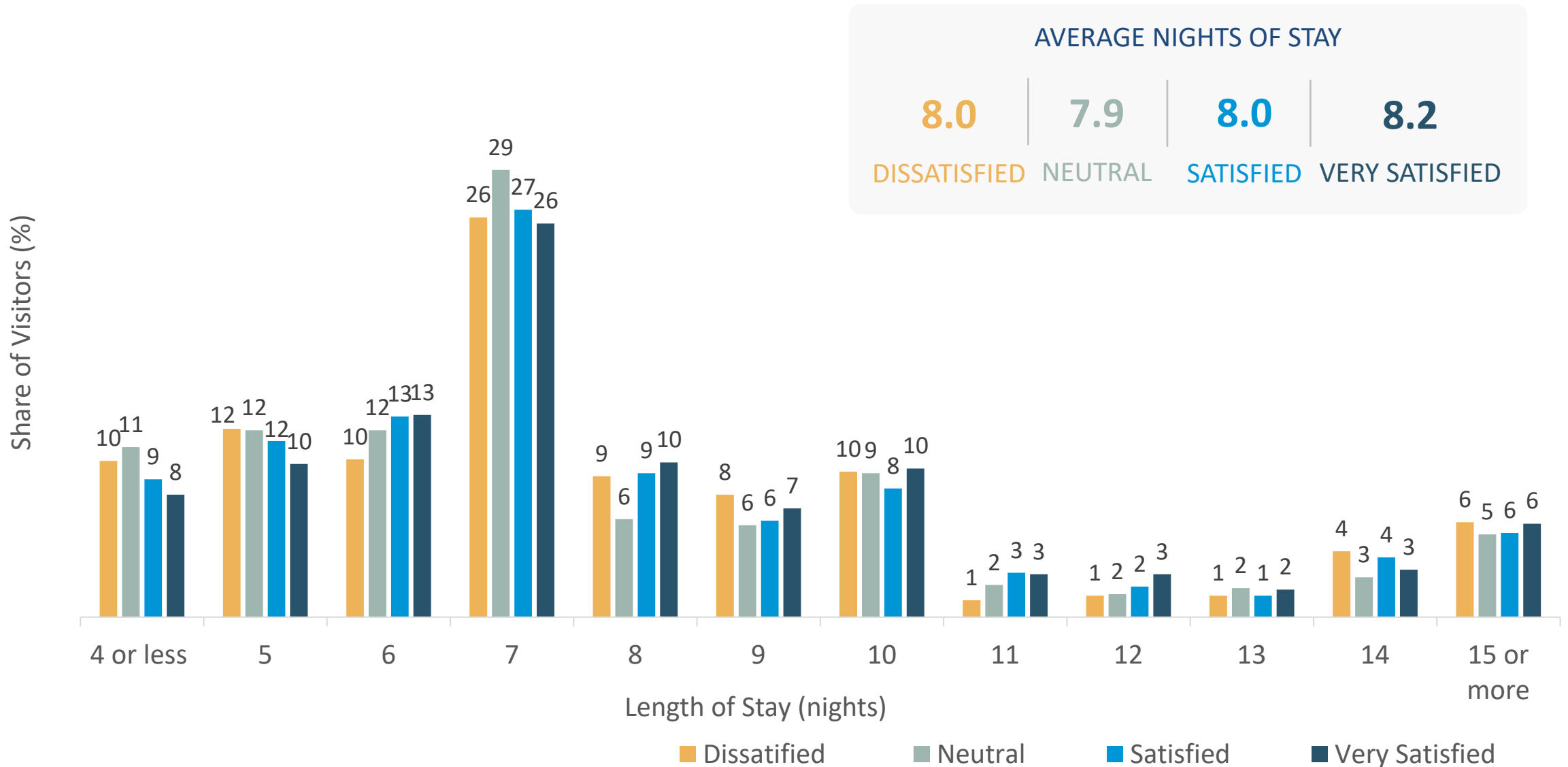


Around 60% of all AU visitors choose Air Vanuatu to travel. The neutral group is slightly more likely to use Virgin Australia and less likely to use Qantas than other segments.



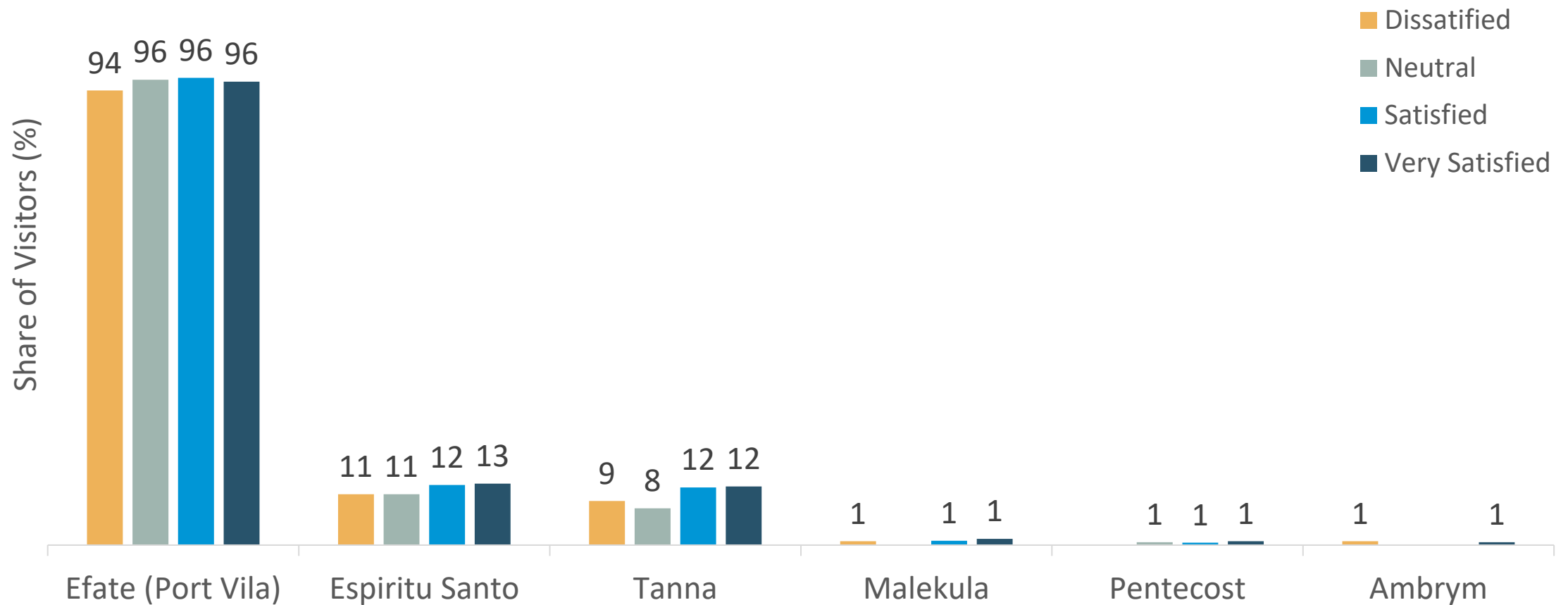
Note: Multiple responses, therefore total does not add up to 100%

Very Satisfied AU visitors had a slightly longer average stay than the other segments.



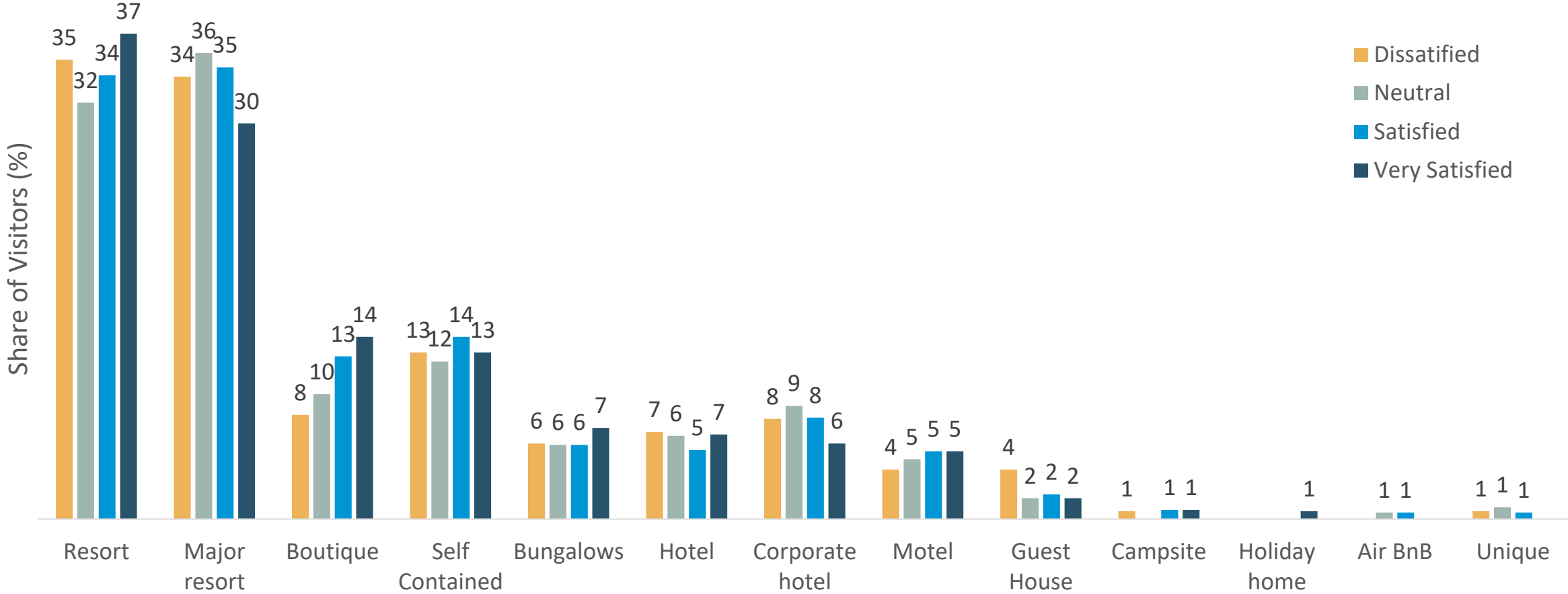
Note: 31 and 31+ days as outliers were removed for length of stay analysis

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%

Over a third of all AU visitors stay at a Resort in Vanuatu. Very Satisfied visitors are more likely to stay at Resort and Boutique accommodations than other segments. Neutral visitors have the highest propensity to stay at Major Resorts and Corporate Hotels.



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

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



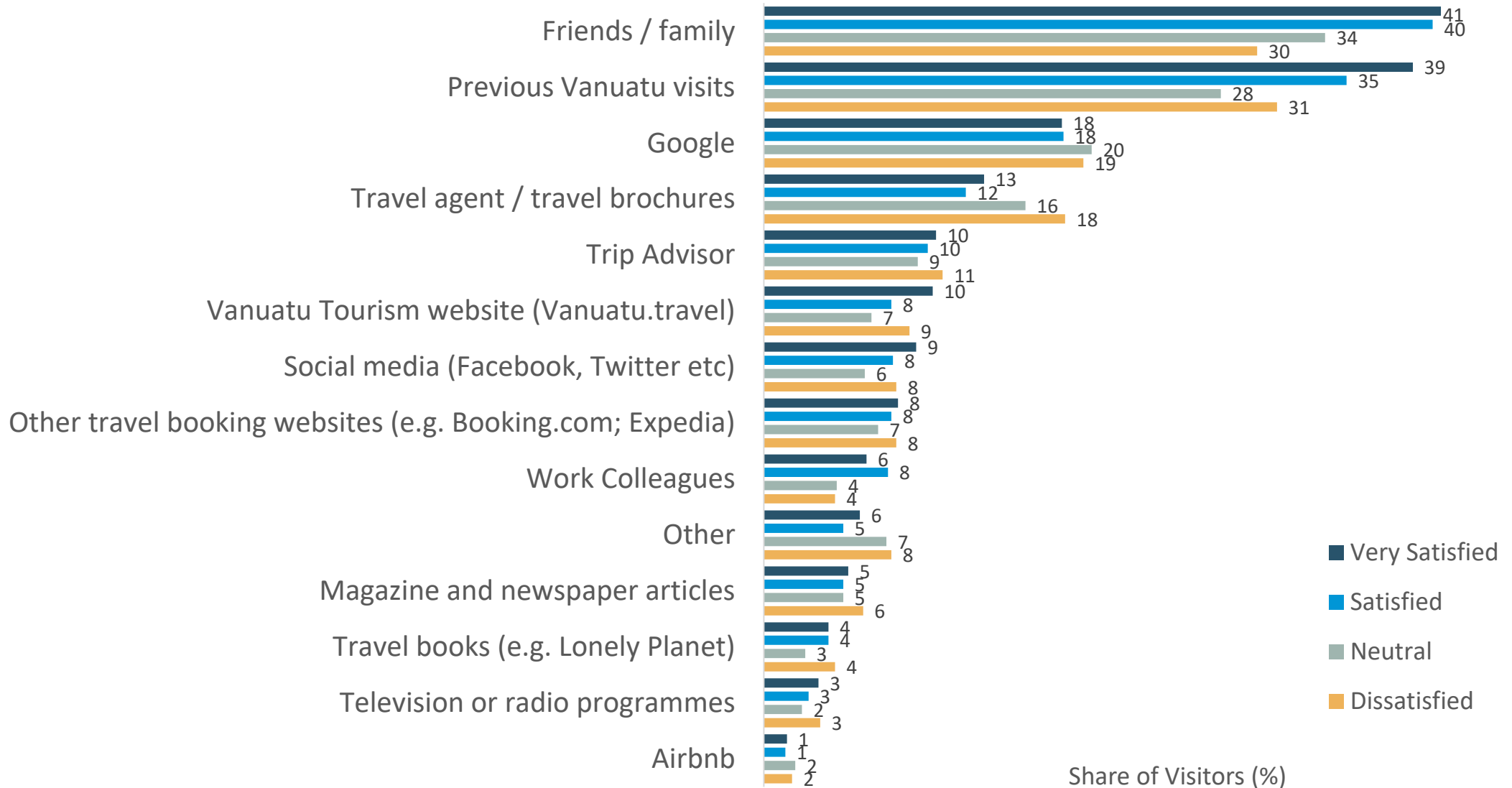
Visitor Spending
and Impact



Visitor
Satisfaction

For AU visitors Family/Friends is the most common way to find out about Vanuatu, followed by previous visits. Very Satisfied visitors are most likely to search the Vanuatu Tourism Website and social media. Dissatisfied and Neutral visitors tend to use Google search as well as make more use of travel agents/ travel brochures.

How did you find out about Vanuatu as a destination?



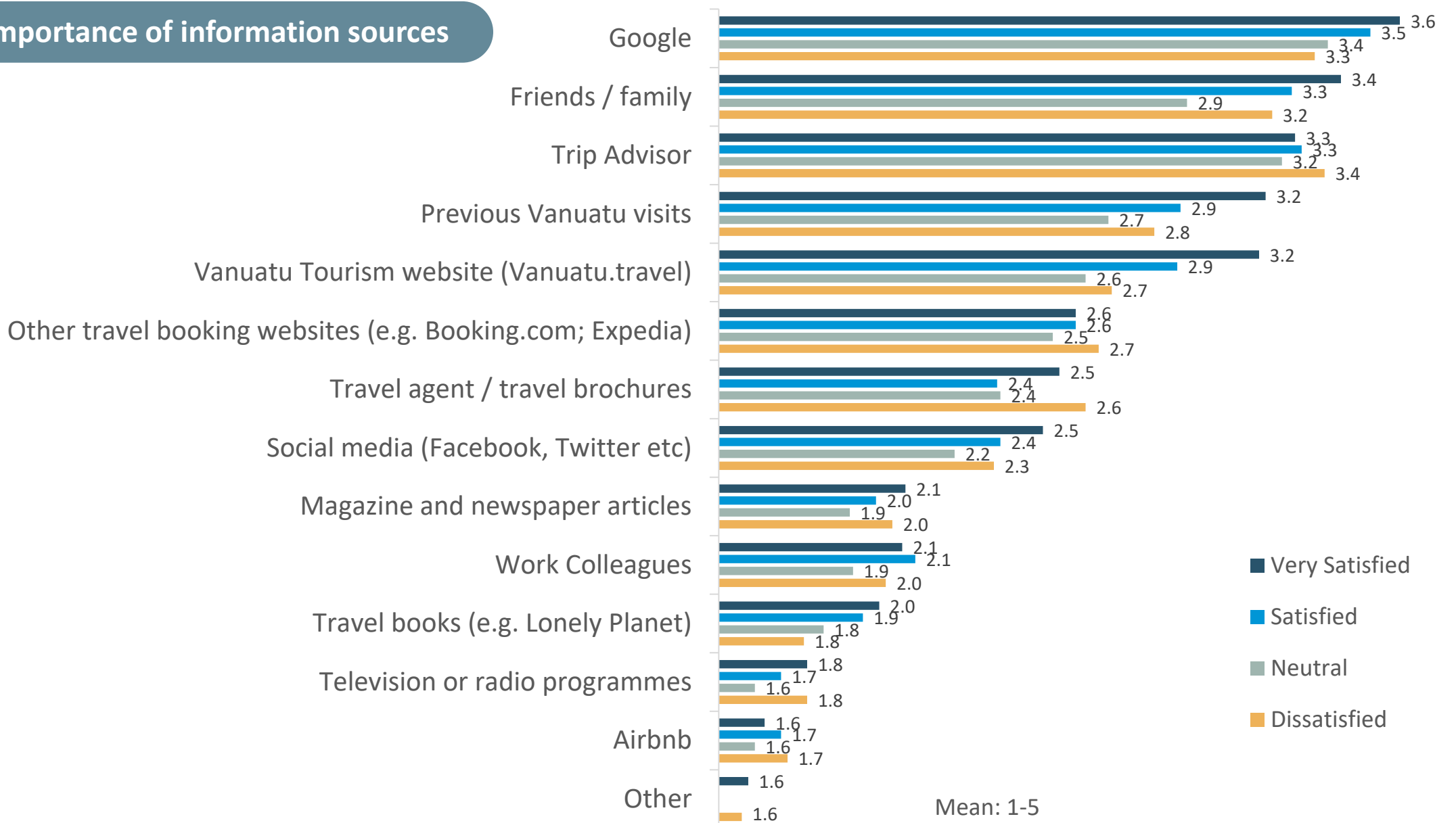
Share of Visitors (%)

■ Very Satisfied
■ Satisfied
■ Neutral
■ Dissatisfied

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

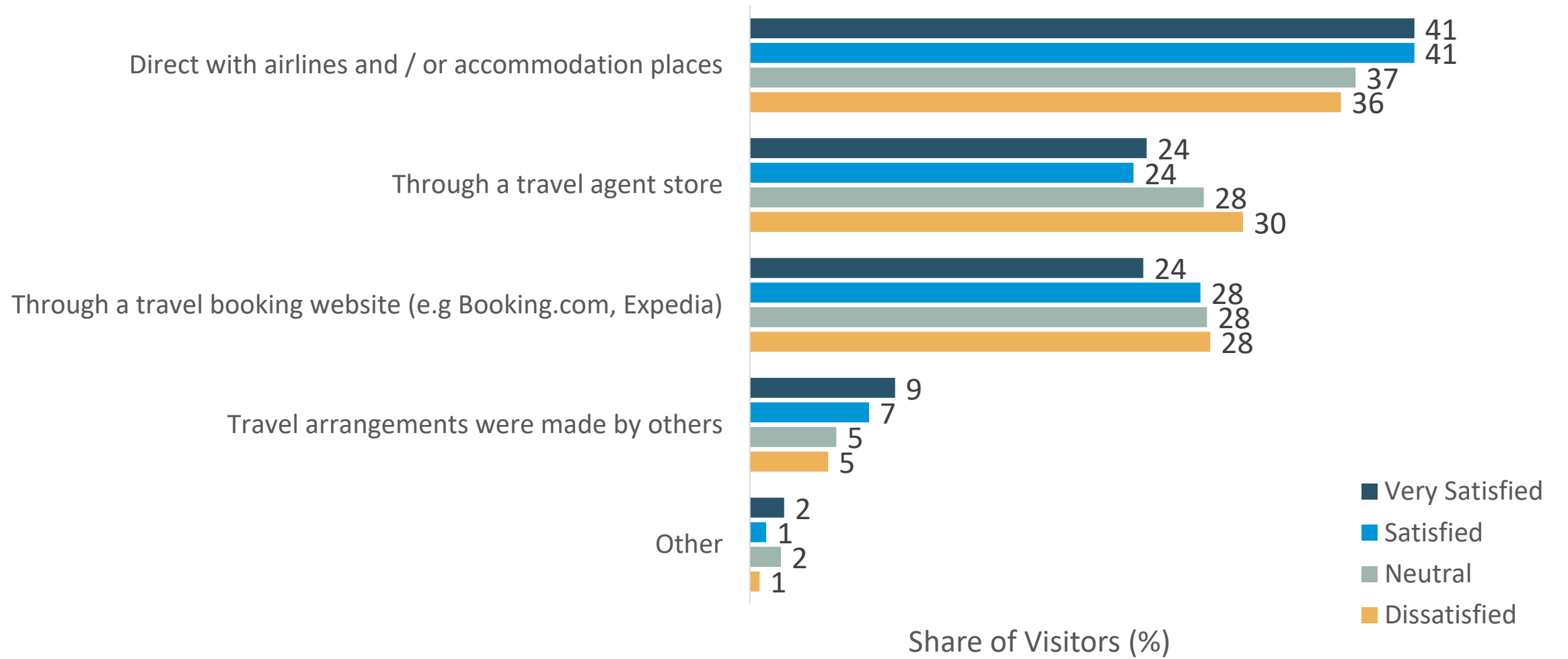
Google search and friends/family are the most important information sources for AU visitors to Vanuatu. Previous visits and the Vanuatu Tourism website are particularly important information sources for Very Satisfied visitors.

Q Importance of information sources



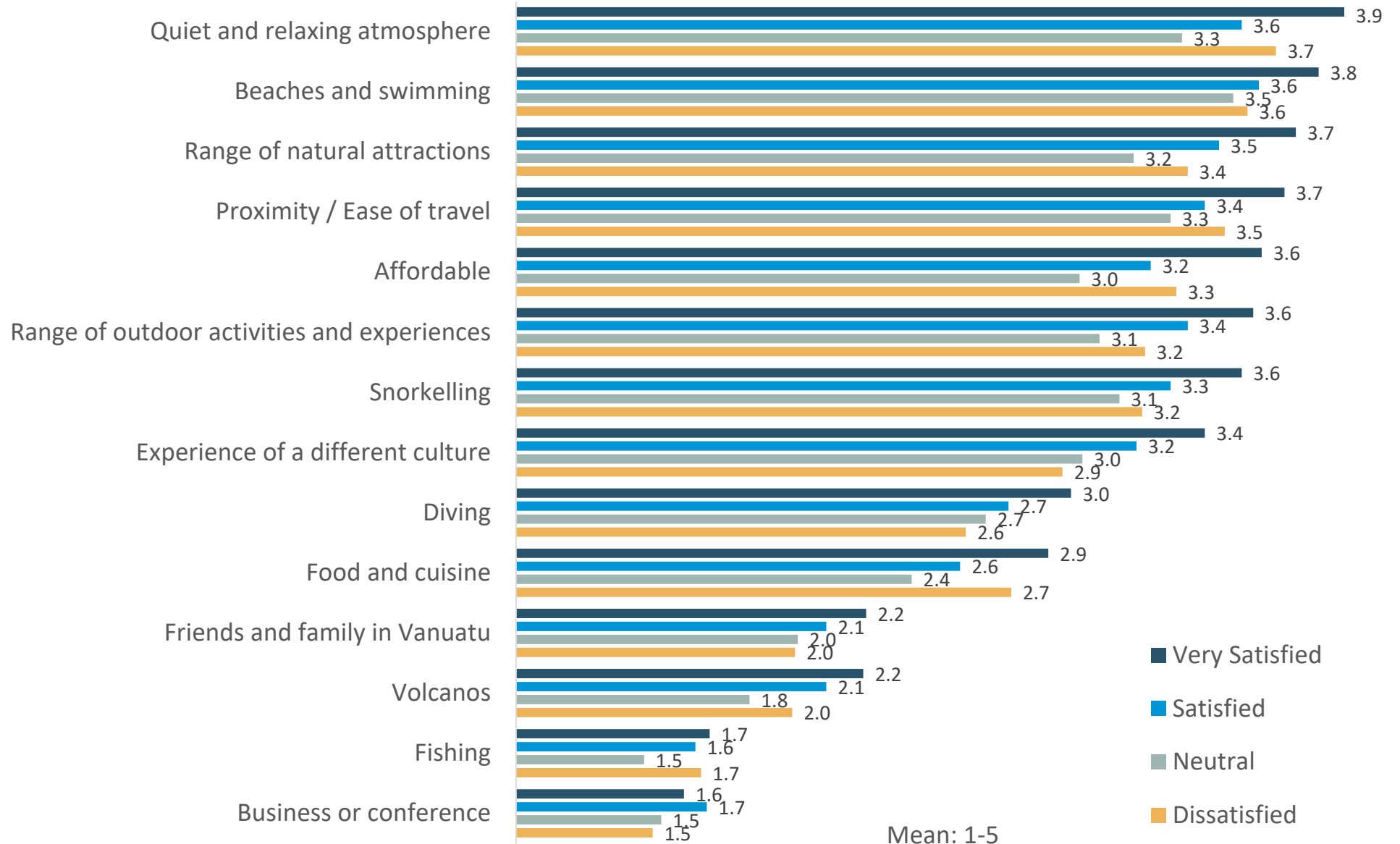
More than 40% of Very Satisfied and Satisfied AU visitors make their bookings directly with airlines and accommodations. Nearly 30% Dissatisfied or Neutral visitors book through a travel agent store.

Q How did you purchase your travel?



Atmosphere and Beach/Swimming are the most significant factors influencing AU tourists to visit Vanuatu. Almost all factors except “business and conference” are more influential for Very Satisfied visitors.

Q Influential factors in decisions of travelling to Vanuatu



Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

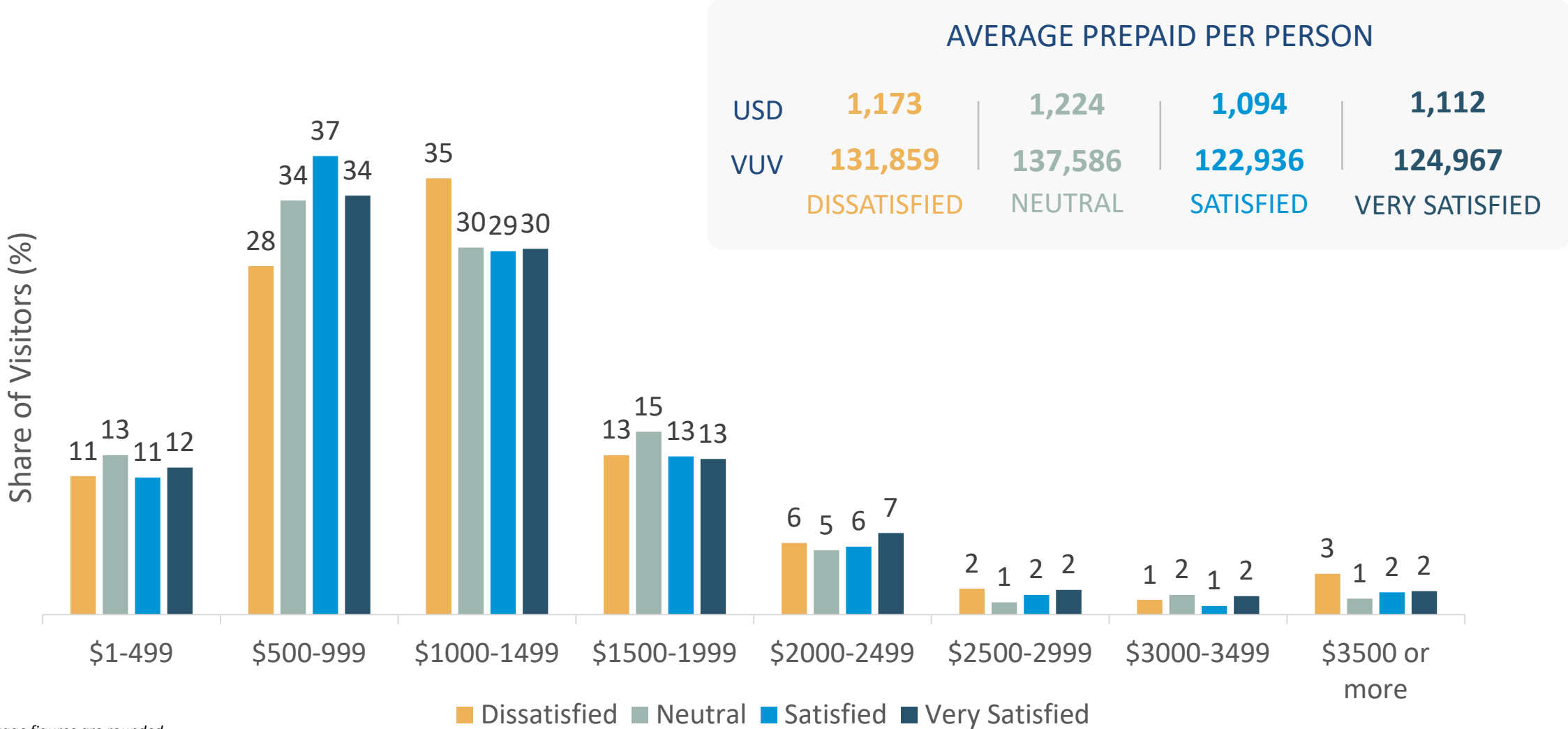


Visitor Spending
and Impact



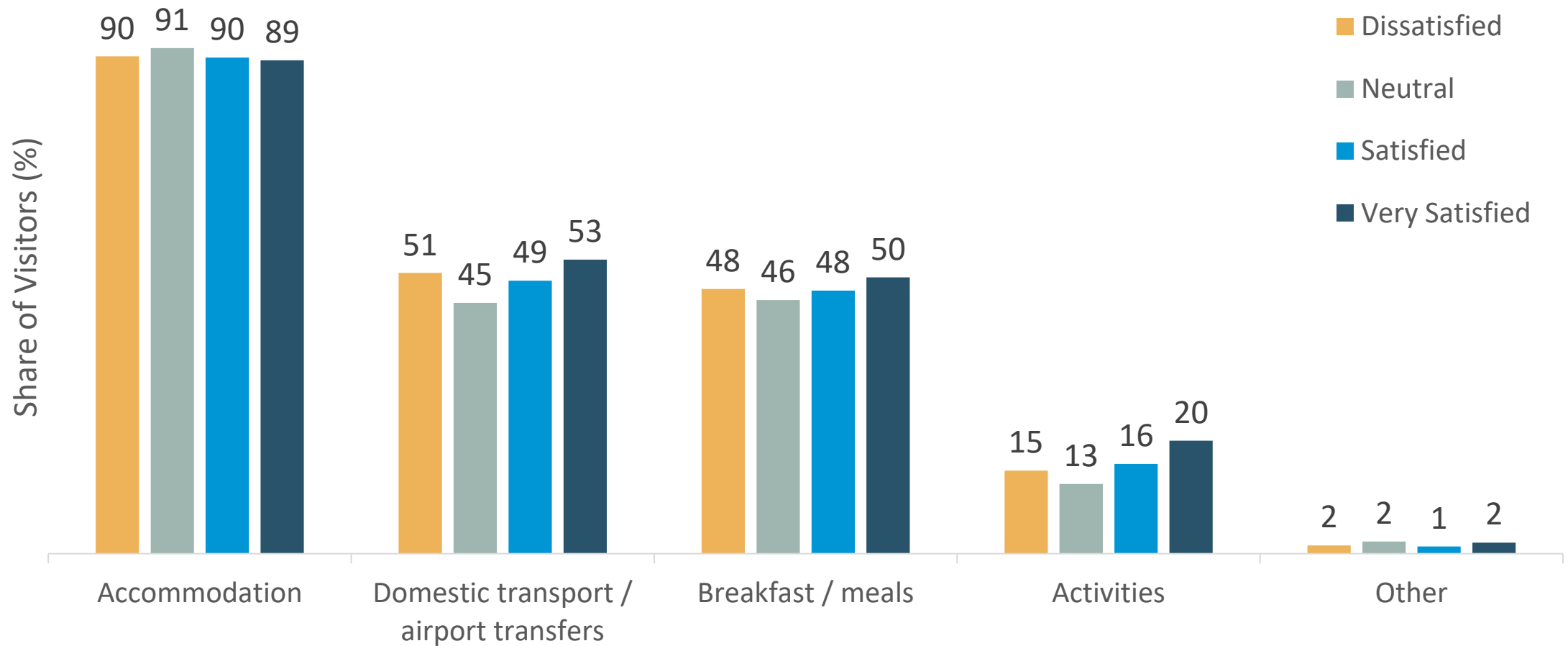
Visitor
Satisfaction

Dissatisfied and Neutral AU visitors spend approximately 5% - 10% more than Very Satisfied visitors prior to arrival .



Note: Percentage figures are rounded

Prepaid items: Very Satisfied visitors are likely to spend more on domestic transport, breakfast, and activities than other groups.



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

Dissatisfied visitors have the highest in-country spend per day, spending more on Food and Beverage, Retail, Entertainment, Domestic travel and Duty Free.

	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>
Food & Beverage	31	35	30	35	29	34	27	33
Accomodation	20	22	24	27	19	22	19	23
Tours	8	9	7	9	9	10	8	10
Retail	9	10	7	8	8	10	8	10
Local Transport	6	7	6	7	6	7	5	6
Entertainment, Internet & Service	5	5	4	5	4	5	4	5
Domestic Travel	5	5	4	5	4	5	4	5
Souvenirs	2	3	2	2	3	3	3	4
Duty Free	3	4	2	2	2	3	2	3
TOTAL	90		86		86		81	

Economic Impact – Per Person and Total: Dissatisfied visitors’ impact per trip is the highest of the four segments. They inject \$US88/VT 9911 more into the economy per trip than their Very Satisfied counterparts.

	DISSATISFIED	NEUTRAL	SATISFIED	VERY SATISFIED
Average Spend Prior to arrival	USD/VT	USD/VT	USD/VT	USD/VT
Per Person Per Trip	1,173/131,859	1,224/137,586	1,094/122,936	1,112/124,967
<i>Flowing into local economy rate est. 62.5%</i>				
Per Person Per Trip	733/82,412	765/85,991	683/76,835	695/78,105
Per Person per Day	92/10,314	97/10,954	85/9,592	85/9,513
<i>Length of Study (nights)</i>	8.0 nights	7.9 nights	8.0 nights	8.2 nights
<hr/>				
Average Local Spend				
Per Person Per Trip	716/80,504	675/75,913	687/77,277	666/74,900
Per Person per Day	90/10,076	86/9,670	86/9,648	81/9,123
<hr/>				
Total Economic Impact-Per Trip	1,449/162,916	1,440/161,904	1,370/154,016	1,361/153,005
Total Economic Impact-Per Day	182/20,461	183/20,625	171/19,240	166/18,636

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

Report Structure



Visitor
Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



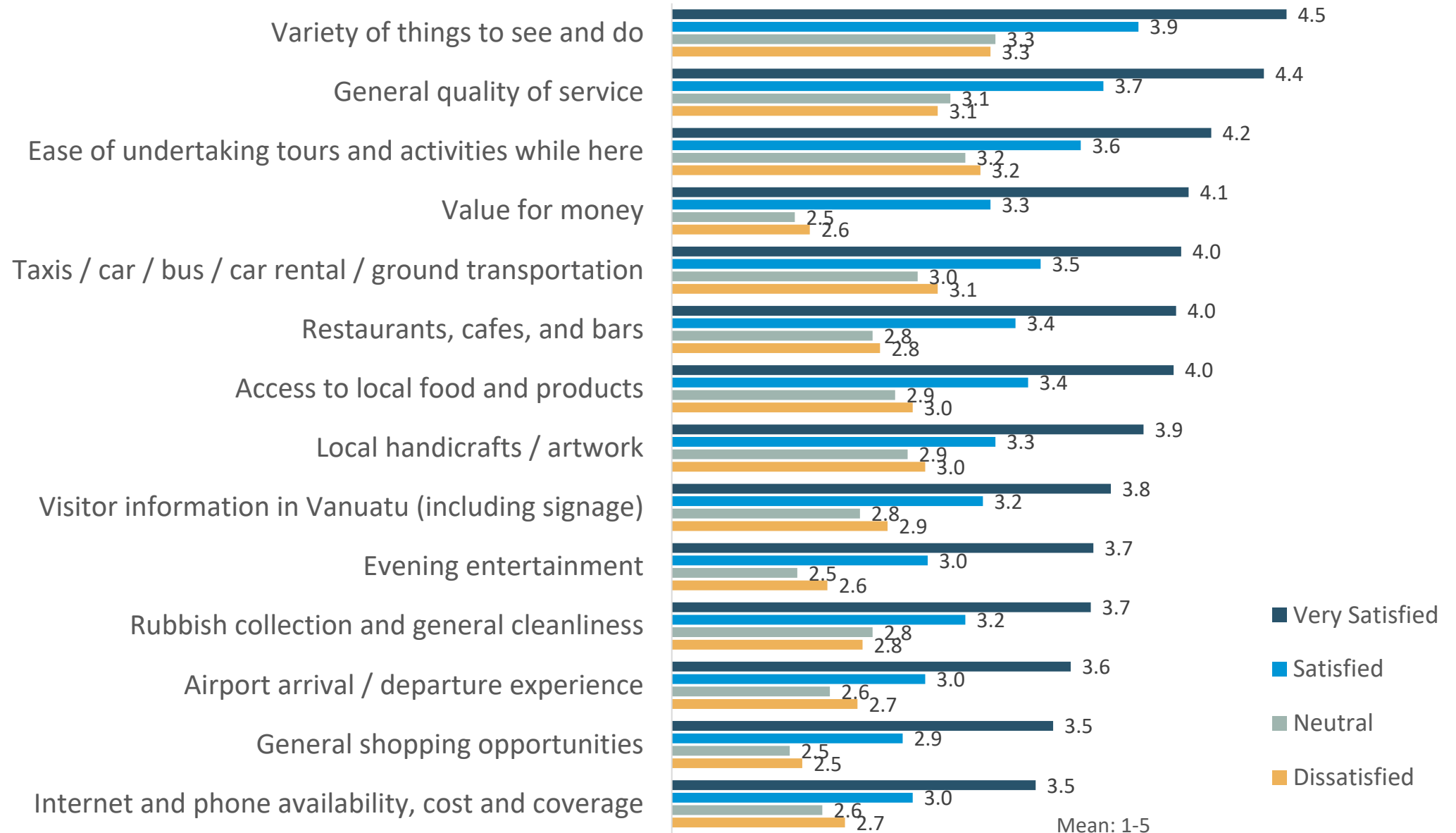
Visitor Spending
and Impact



Visitor
Satisfaction

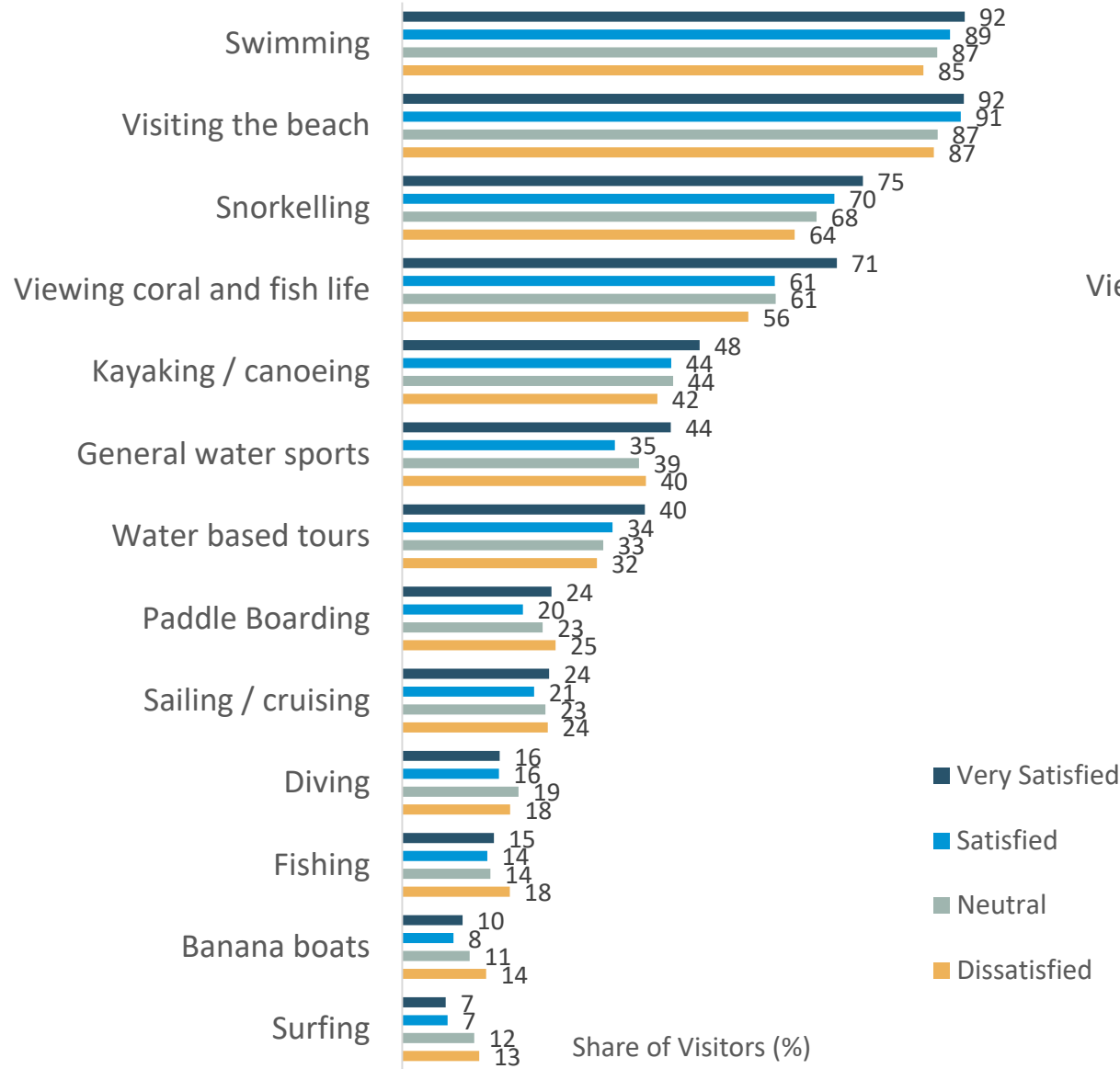
Very satisfied visitors are far more satisfied with a range of travel experiences. General shopping, value for money and evening entertainment receive particularly low scores from the Dissatisfied segment.

Satisfaction with services and facilities in Vanuatu

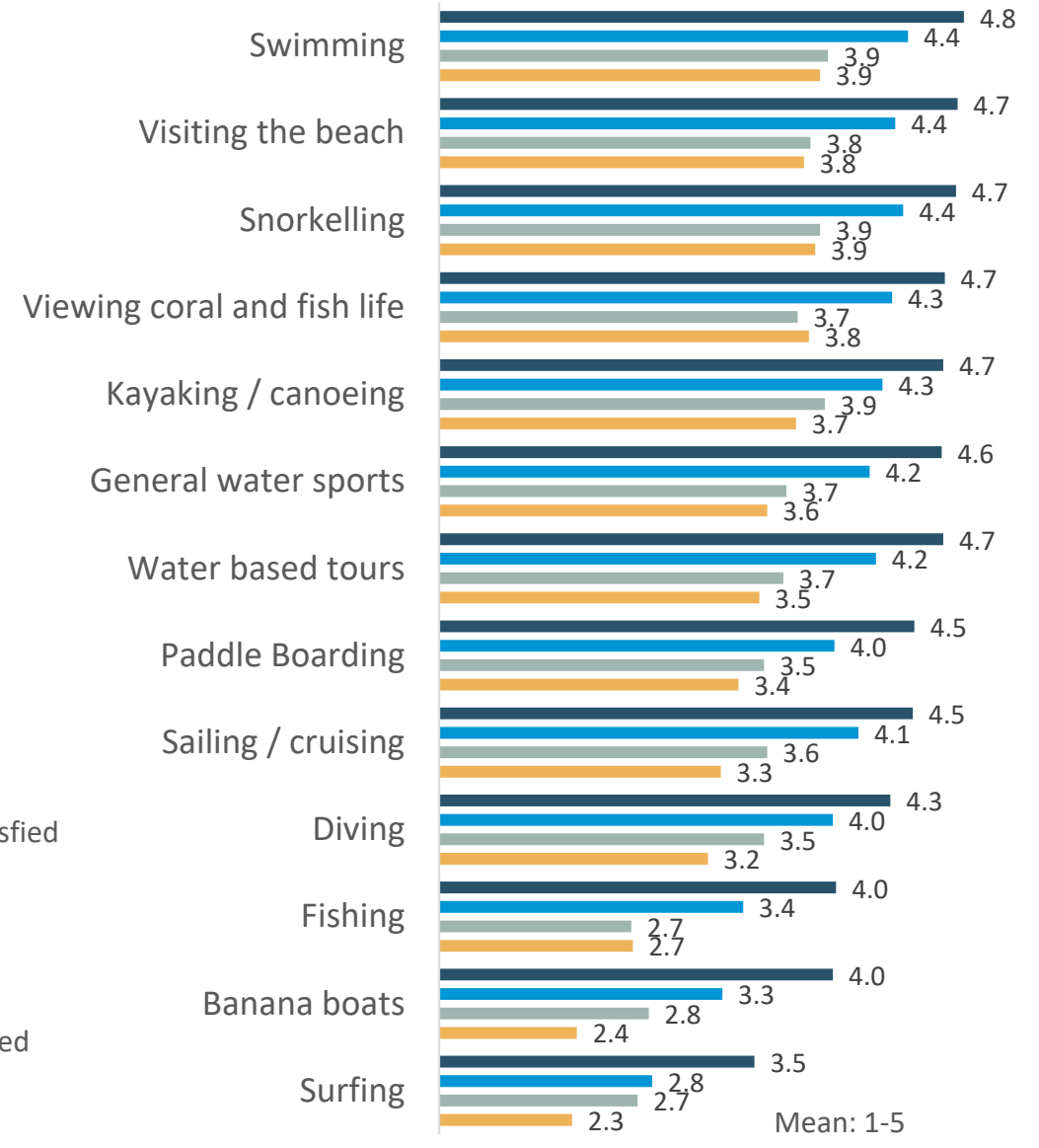


Very Satisfied visitors have the highest participation rate and satisfaction in most water-based activities. Dissatisfied visitors have the highest participation rates for some activities (eg Paddle board, Fishing, Banana boat, Surfing) but are the least satisfied.

Participation Rate

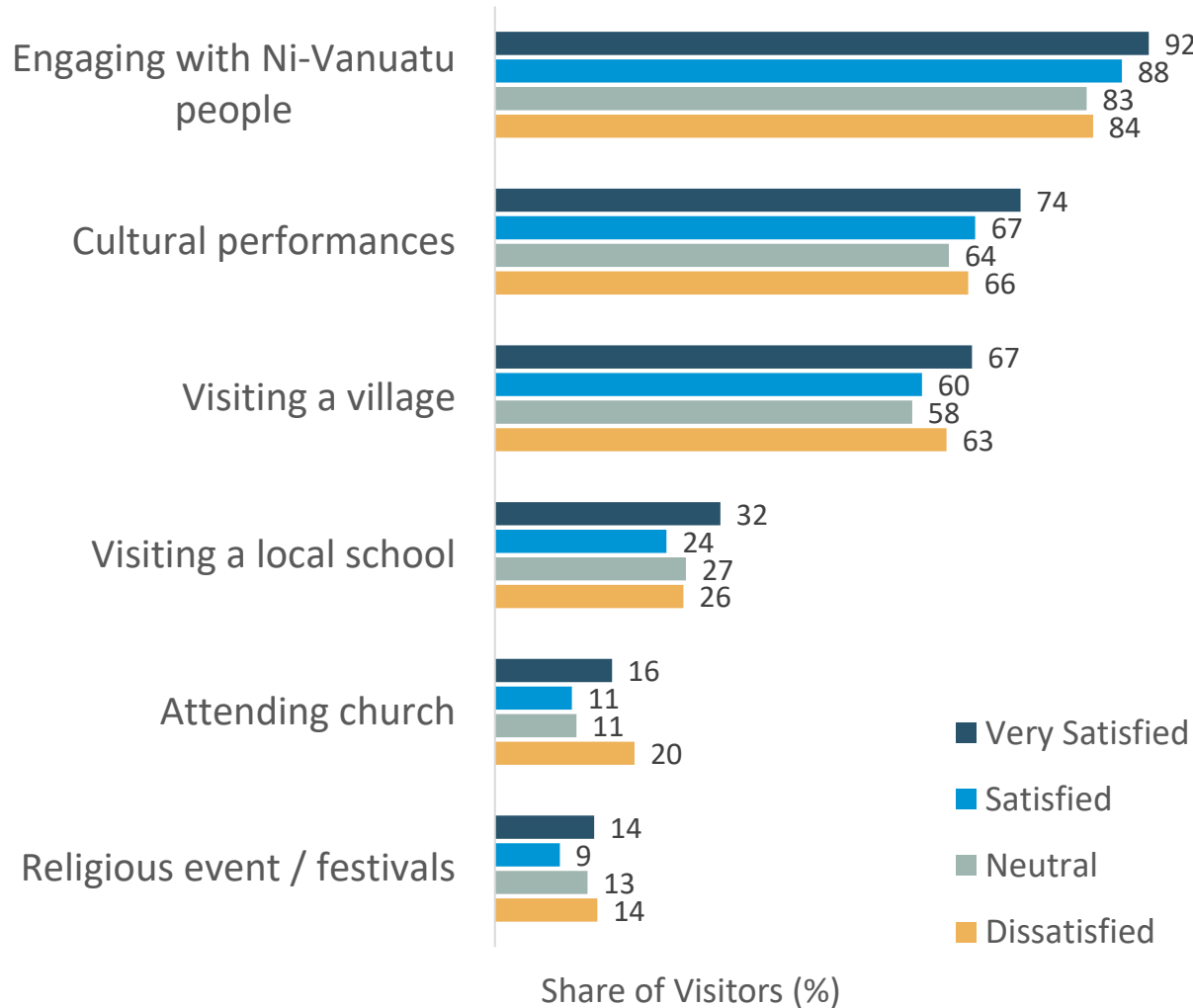


Satisfaction

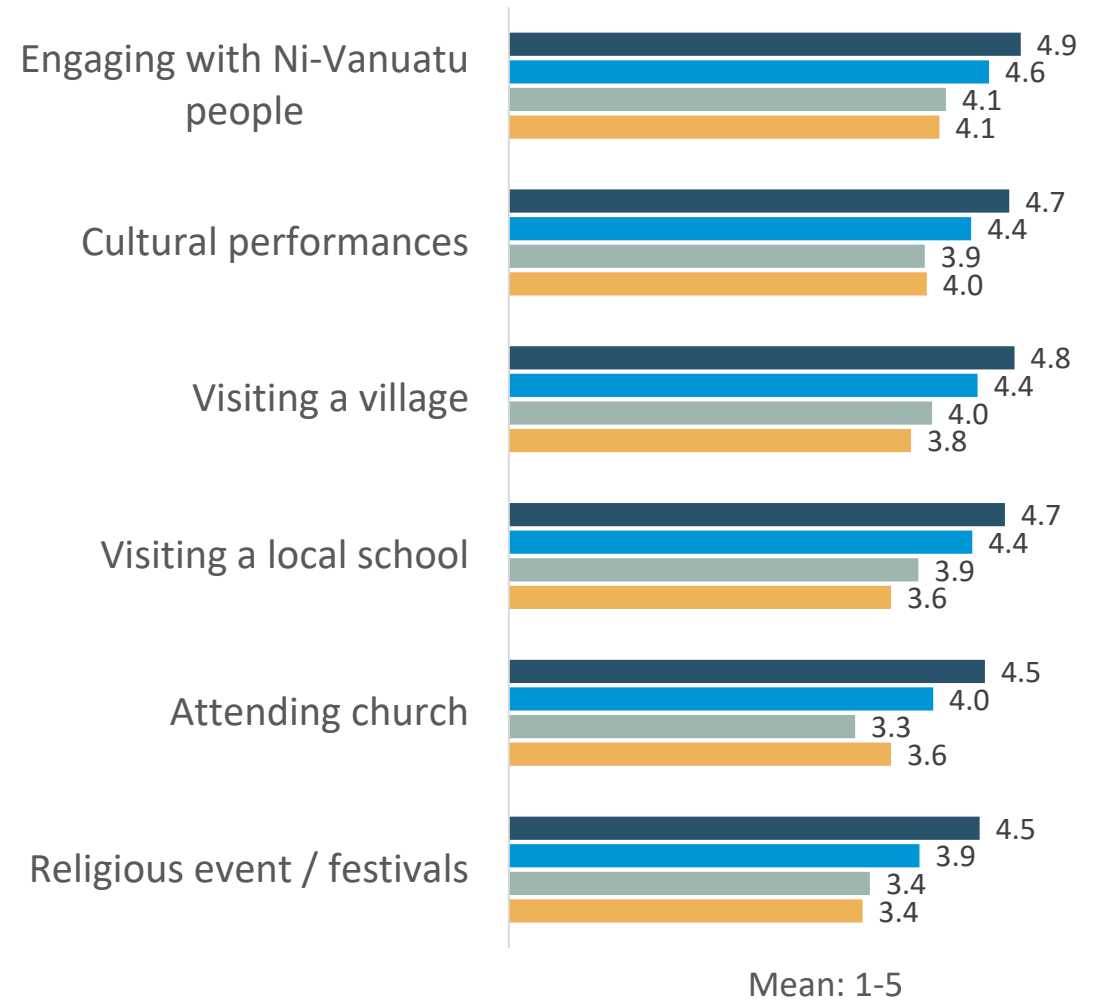


Very Satisfied visitors exhibit higher levels of participation in, and satisfaction with, cultural experiences. Dissatisfied visitors generally have the second highest level of participation in culture activities but are far less satisfied with the experience.

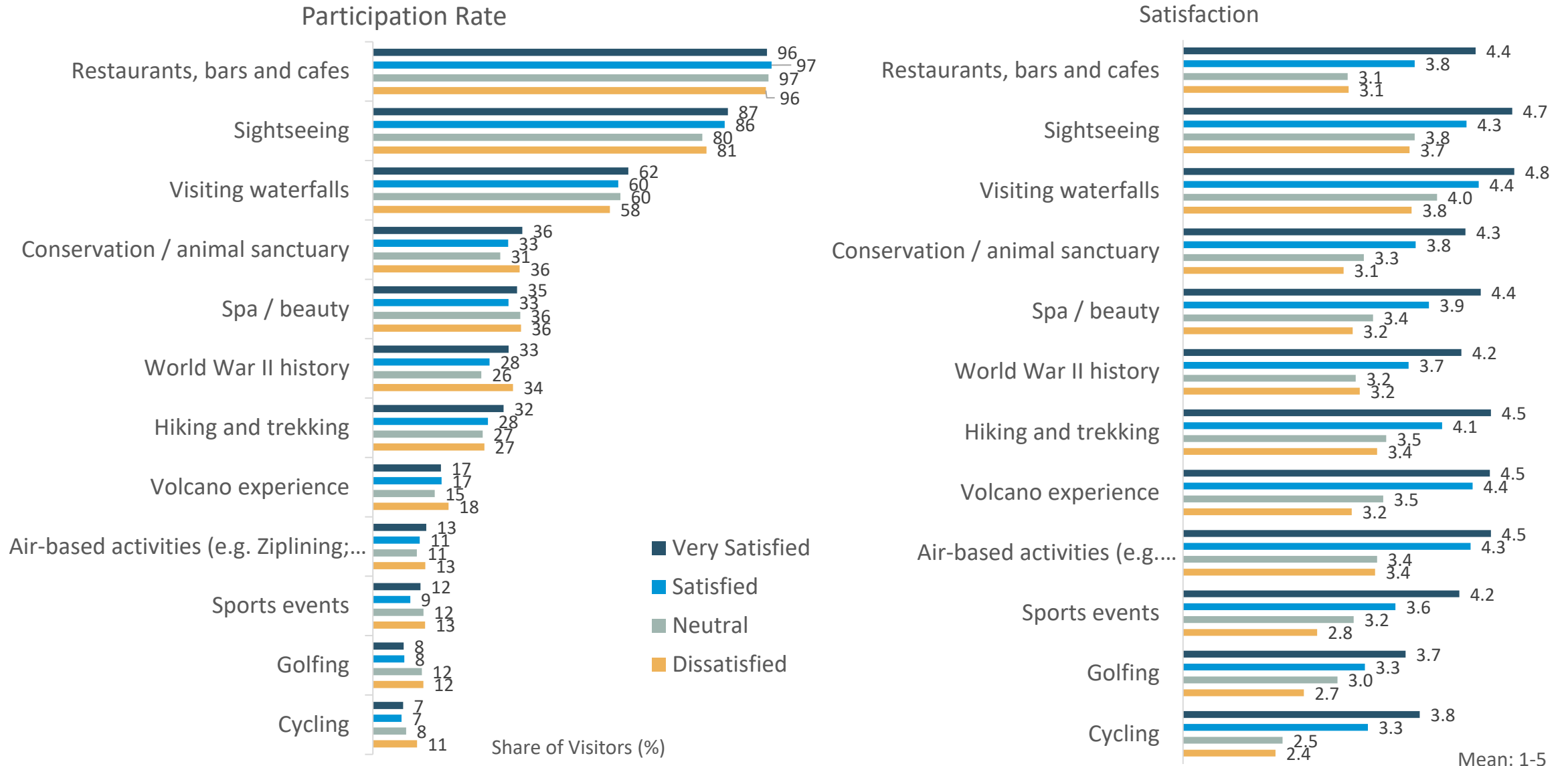
Participation Rate



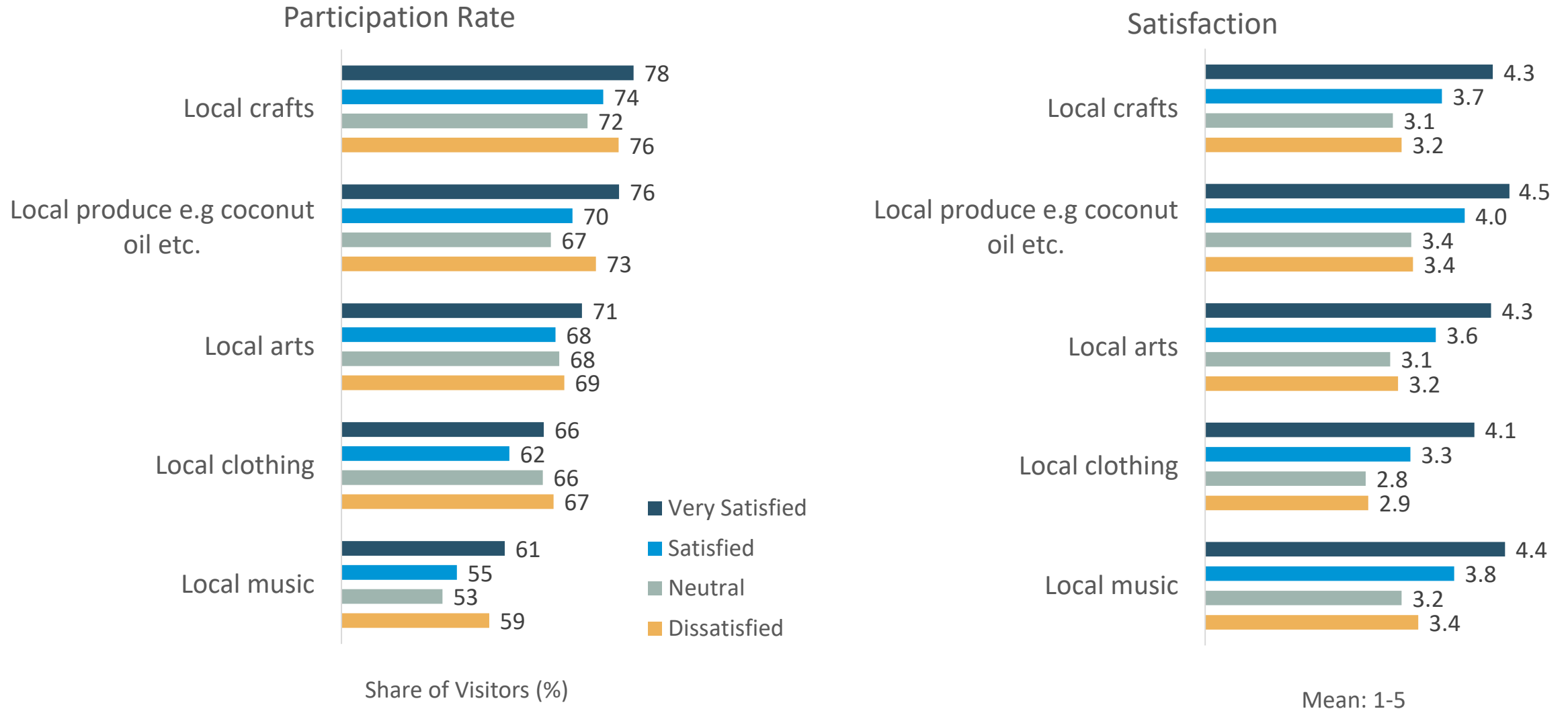
Satisfaction



Very satisfied visitors have high participation in most land-based activities and high satisfaction levels. Dissatisfied visitors have highest participation in 'spa', WWII history, conservation activities, volcano experience, golfing/sports/cycling but are least satisfied.

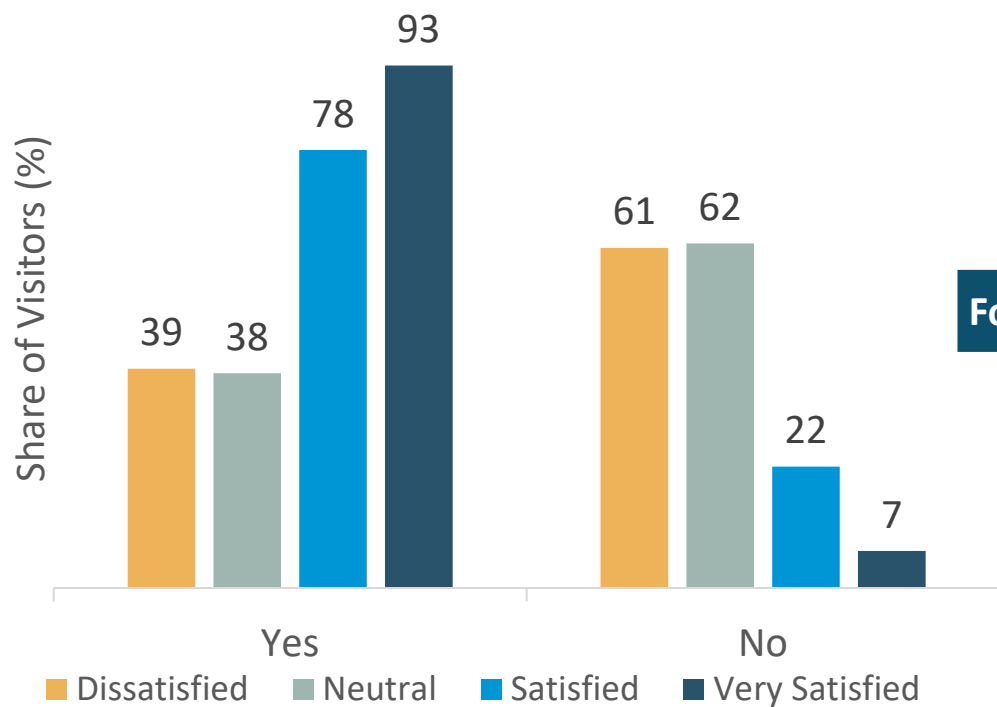


Very satisfied visitors have relatively high participation in shopping activities, their satisfaction with shopping is high. Dissatisfied visitors have the second highest participation in shopping activities, but are much less satisfied.



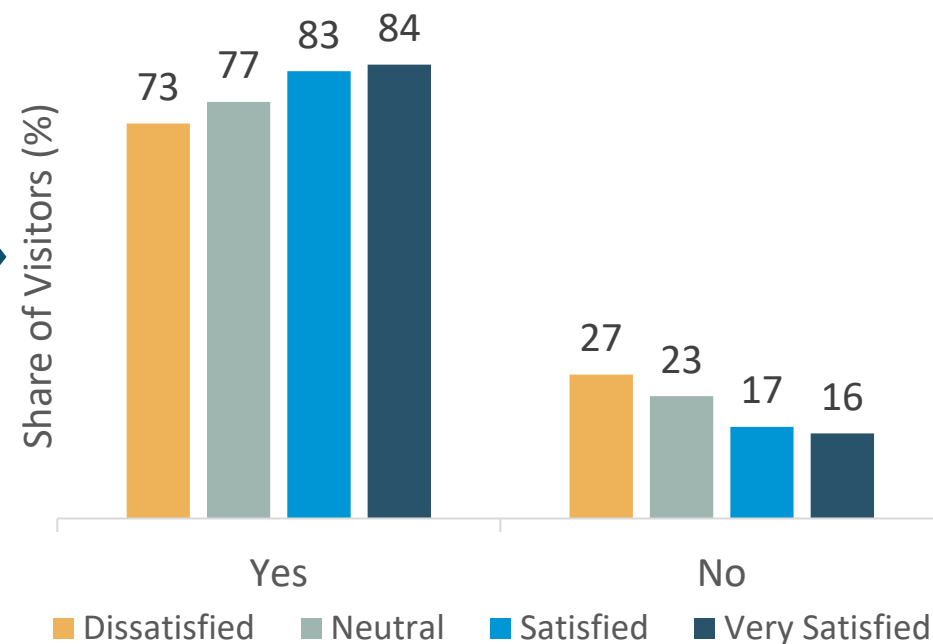
Very Satisfied/Satisfied segments exhibit significantly higher willingness to return to Vanuatu. Willingness to visit outer islands on the next visit is also highest among Very Satisfied and Satisfied visitors.

Willingness to return

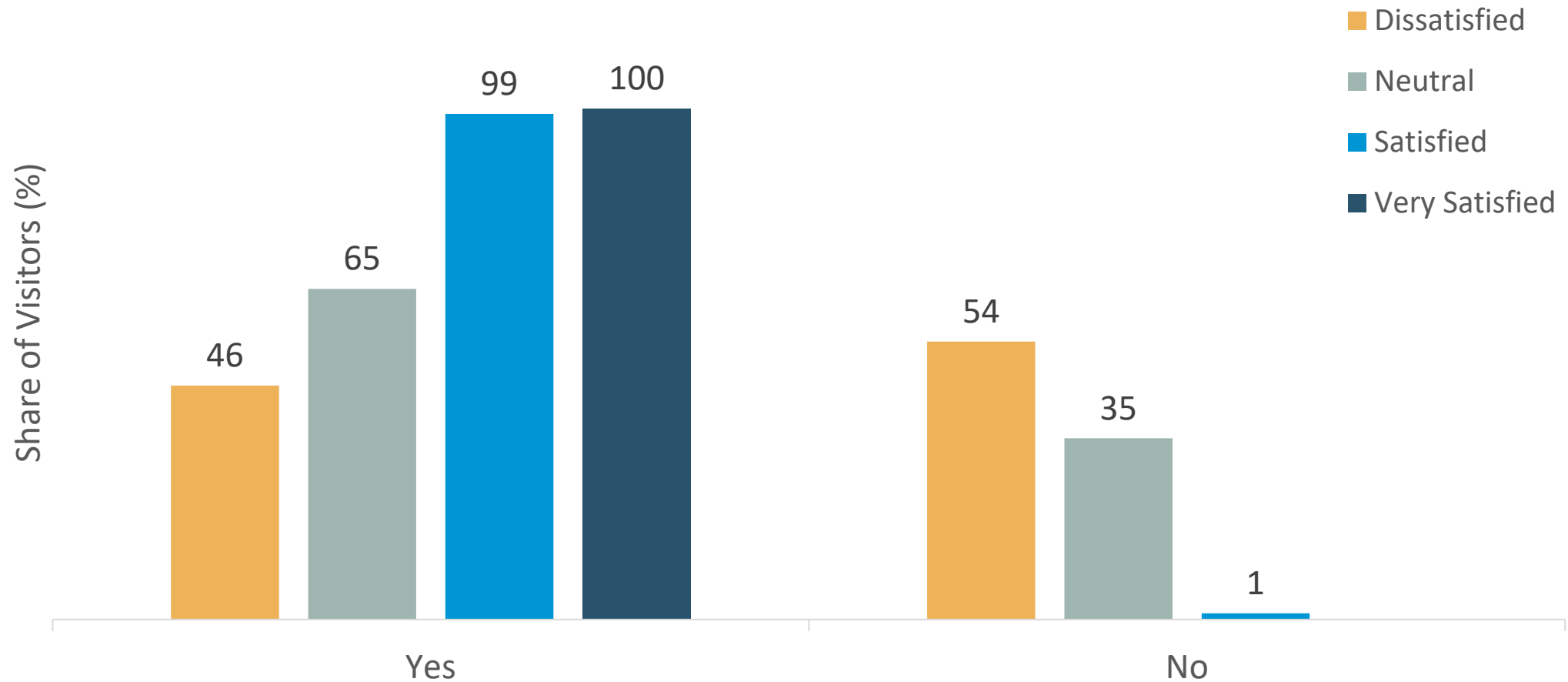


For those who said "yes" →

Willingness to Visit Outer Islands on Next Trip



Nearly all Very Satisfied/Satisfied visitors indicate a willingness to recommend Vanuatu to others. In contrast, the likelihood to recommend among the dissatisfied segment falls to 46%.



An aerial photograph of a tropical beach. The scene is dominated by the bright, sandy ground and the long, dark shadows cast by several palm trees. In the upper left, the gentle waves of the ocean meet the shore. A small thatched-roof hut is visible on the right side. A few small figures of people can be seen on the beach in the upper left quadrant.

Thank you

Team Leader: Simon Milne
Email: simon.milne@aut.ac.nz
Web: <http://www.nztri.org/>
Team Member: Blake Bai