

Vanuatu

INTERNATIONAL VISITORS SURVEY

New Caledonia: Trends & Seasonality

2016-2019

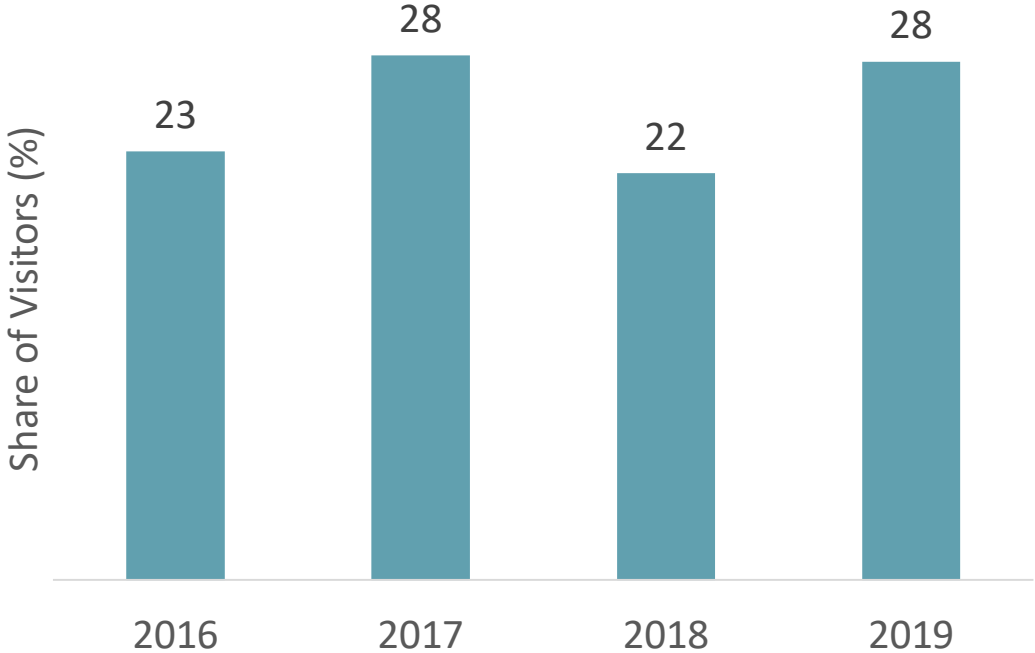


Background

- Time series analysis of International Visitor Survey data (Jan 2016 – Dec 2019) is conducted to help understand the annual trends for the New Caledonia (NC) visitor market to Vanuatu. Where questions have only been introduced or changed in 2018 these are clearly indicated.
- Further seasonality analysis is performed by using quarterly comparisons. Line charts are used to show quarterly variations in a number of visitor characteristics.
- Data from 2015 and 2020 are not included due to major industry disruptions caused by Cyclone Pam and COVID respectively.
- As we disaggregate by season and across a variety of variables, sample sizes will reduce as will data reliability.
- All reports from the IVS are available at:

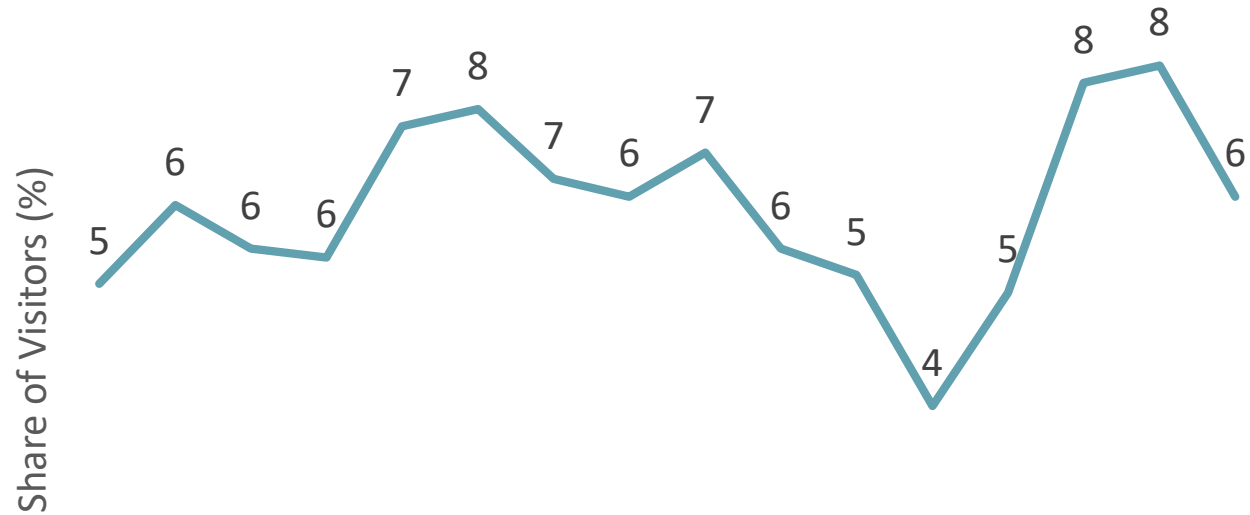
<https://www.nztri.org.nz/tourism-research/pacific/>

New Caledonia Sample Size - IVS 2016-2019



Year	Sample size (n)	%
2016	196	23
2017	240	28
2018	186	22
2019	237	28
Total	859	100

IVS 2016-2019 Seasonality Sample Size



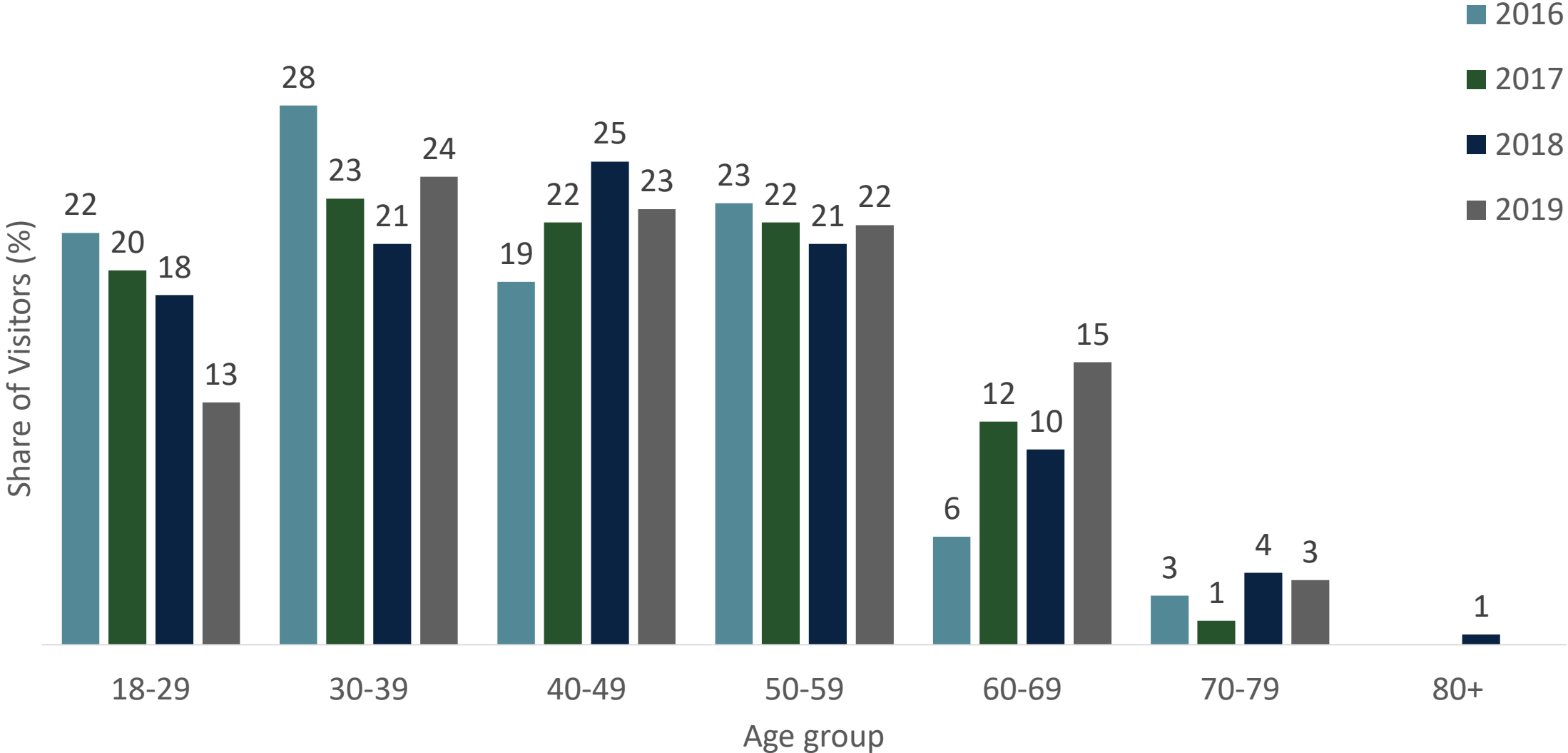
Jan - Apr - Jul - Oct - Jan - Apr - Jul - Oct - Jan - Apr - Jul - Oct - Jan - Apr - Jul - Oct -
 Mar Jun Sep Dec Mar Jun Sep Dec Mar Jun Sep Dec Mar Jun Sep Dec Mar Jun Sep Dec
 2016 2016 2016 2016 2017 2017 2017 2017 2018 2018 2018 2018 2019 2019 2019 2019

Year	Sample size (n)	%
Jan - Mar 2016	45	5
Apr - Jun 2016	54	6
Jul - Sep 2016	49	6
Oct - Dec 2016	48	6
Jan - Mar 2017	63	7
Apr - Jun 2017	65	8
Jul - Sep 2017	57	7
Oct - Dec 2017	55	6
Jan - Mar 2018	60	7
Apr - Jun 2018	49	6
Jul - Sep 2018	46	5
Oct - Dec 2018	31	4
Jan - Mar 2019	44	5
Apr - Jun 2019	68	8
Jul - Sep 2019	70	8
Oct - Dec 2019	55	6
Total	859	100.0

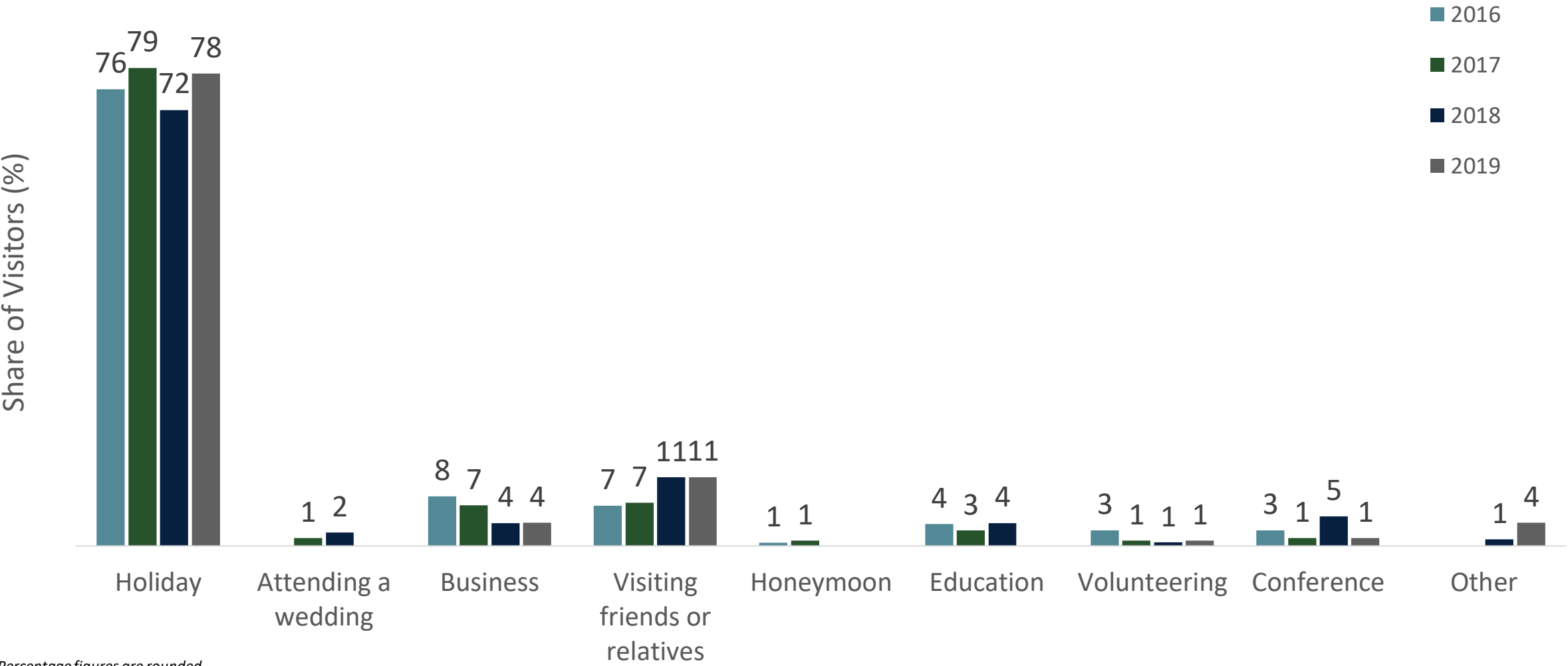


Visitor Characteristics & Preferences

Most visitors are in the 30-59 age group. The 18-29 grouping has declined in relative significance while the 60+ grouping has grown.

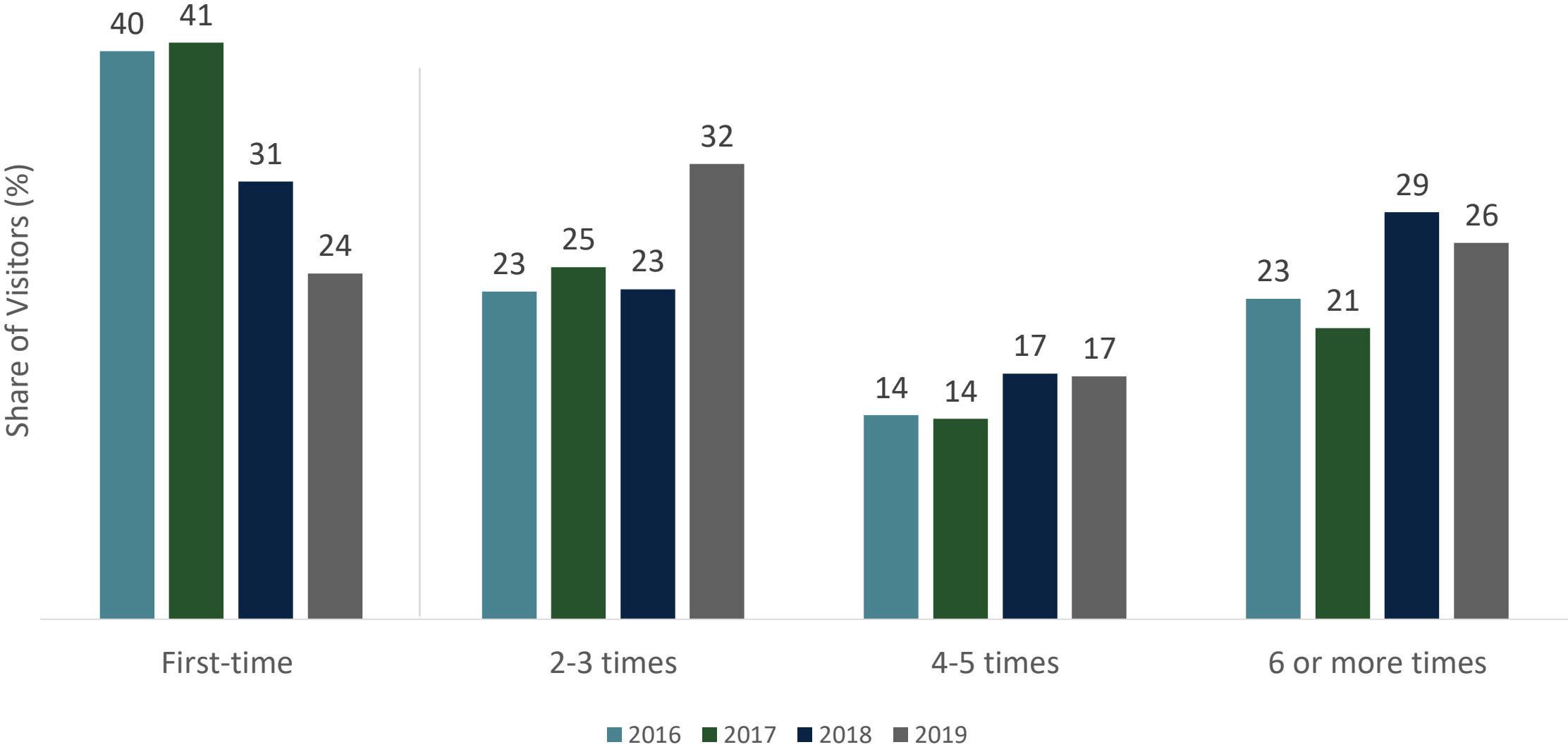


The majority of NC visitors indicating Holiday as their main purpose of visit has remained relatively constant. Business has declined as a portion of the sample while VFR has grown.

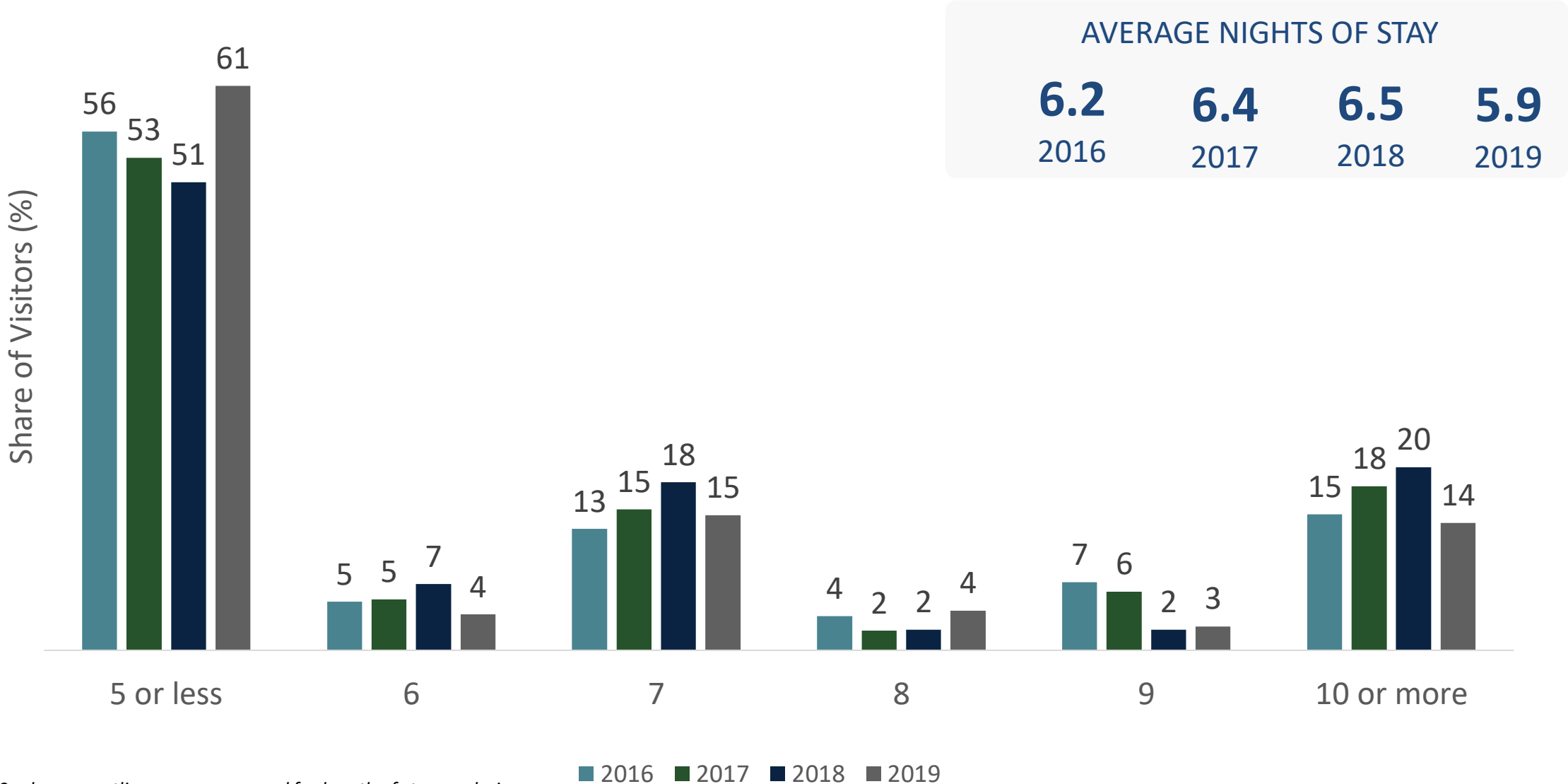


Note: Percentage figures are rounded

The here has been some growth in repeat visitation.

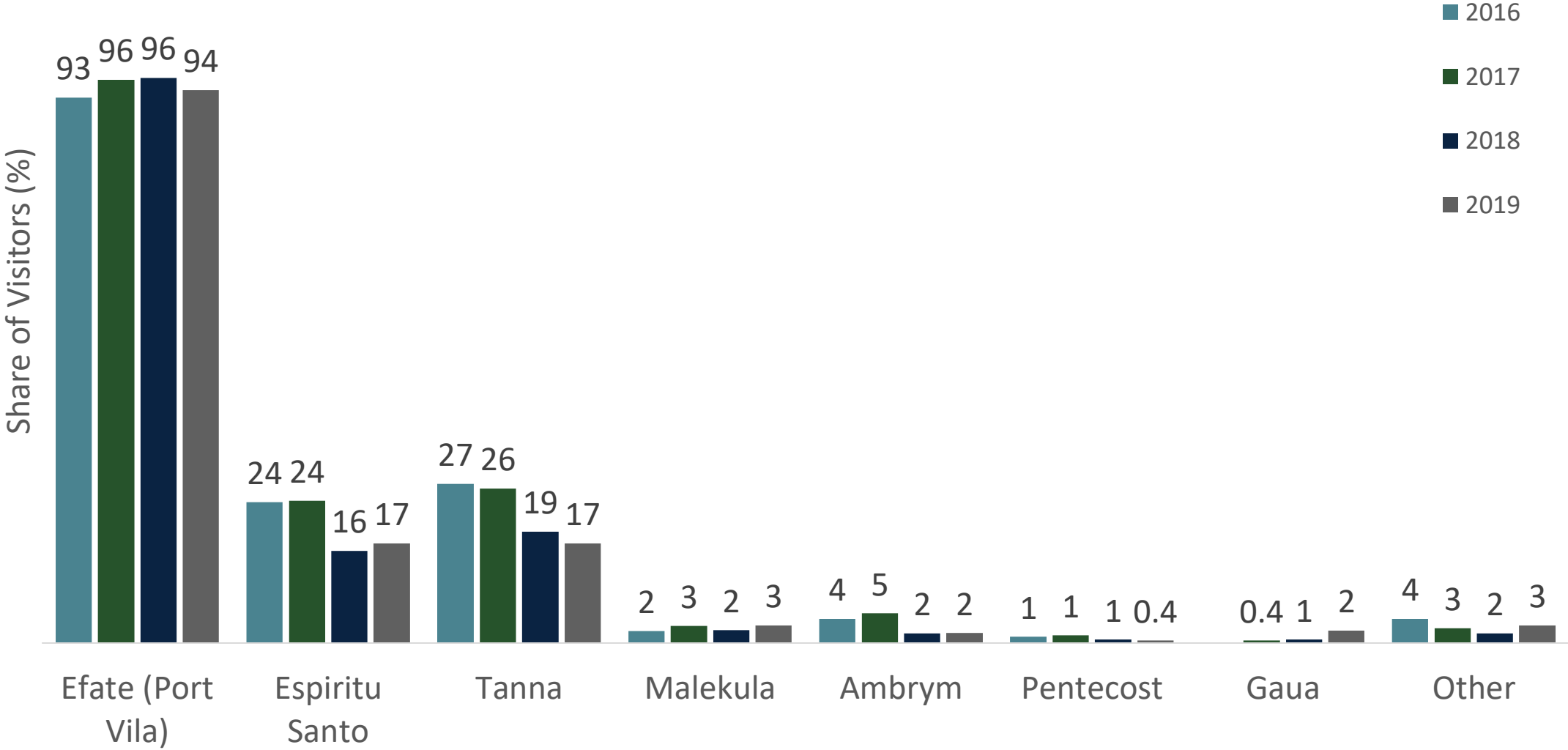


More than half NC visitors stayed in Vanuatu less than 5 nights. 2019 saw a reversal in the trend of increasing length of stay.



Note: 30 and 30+ days as outliers were removed for length of stay analysis

Travel to outer islands has shown some tendency to decline.



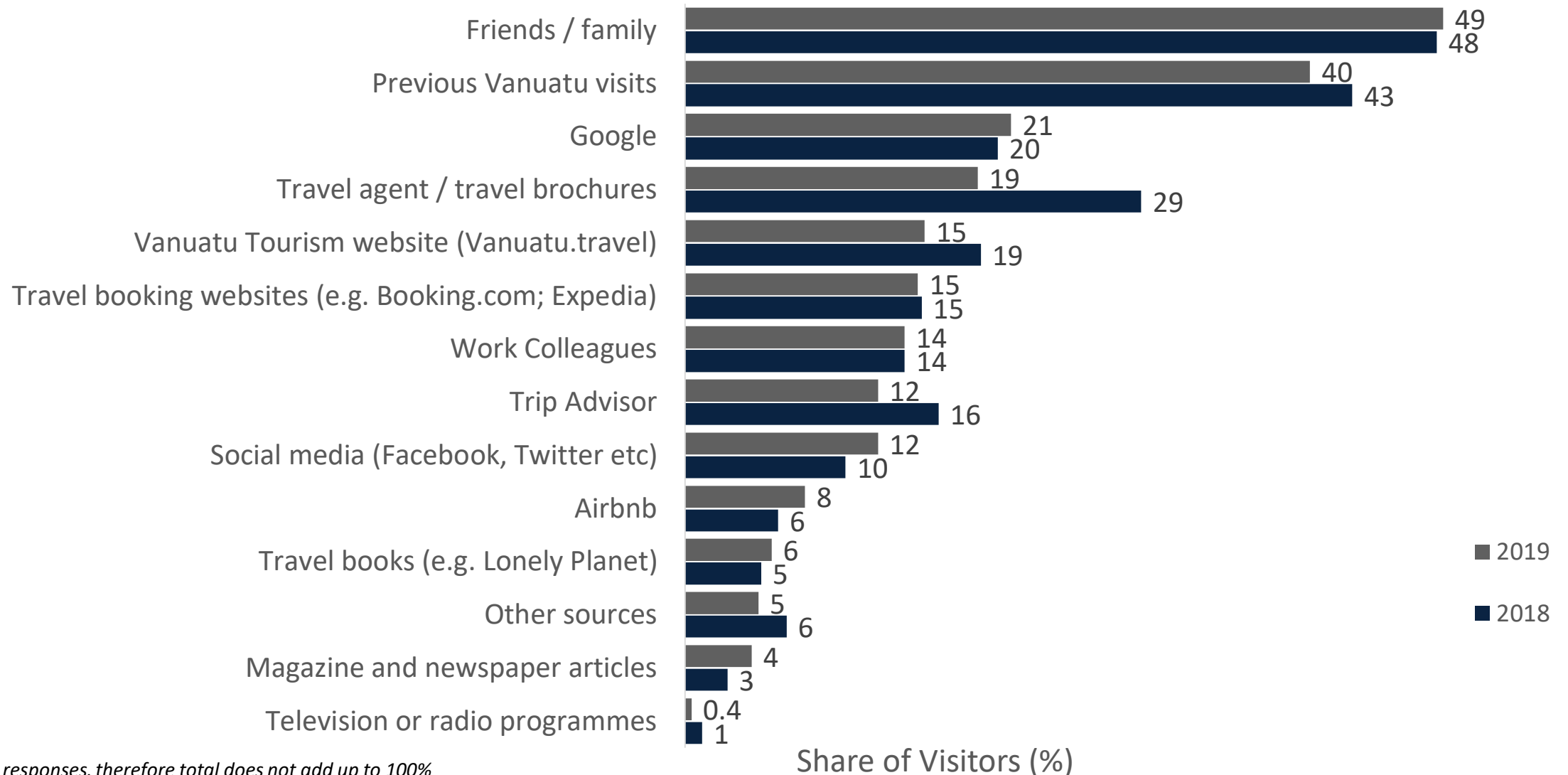
Note: Multiple responses, therefore total does not add up to 100%



Importance of sources of information

IVS 2018-2019: the relative significance of friends/family and previous visits remained consistent. A drop in agent use/brochures is significant.

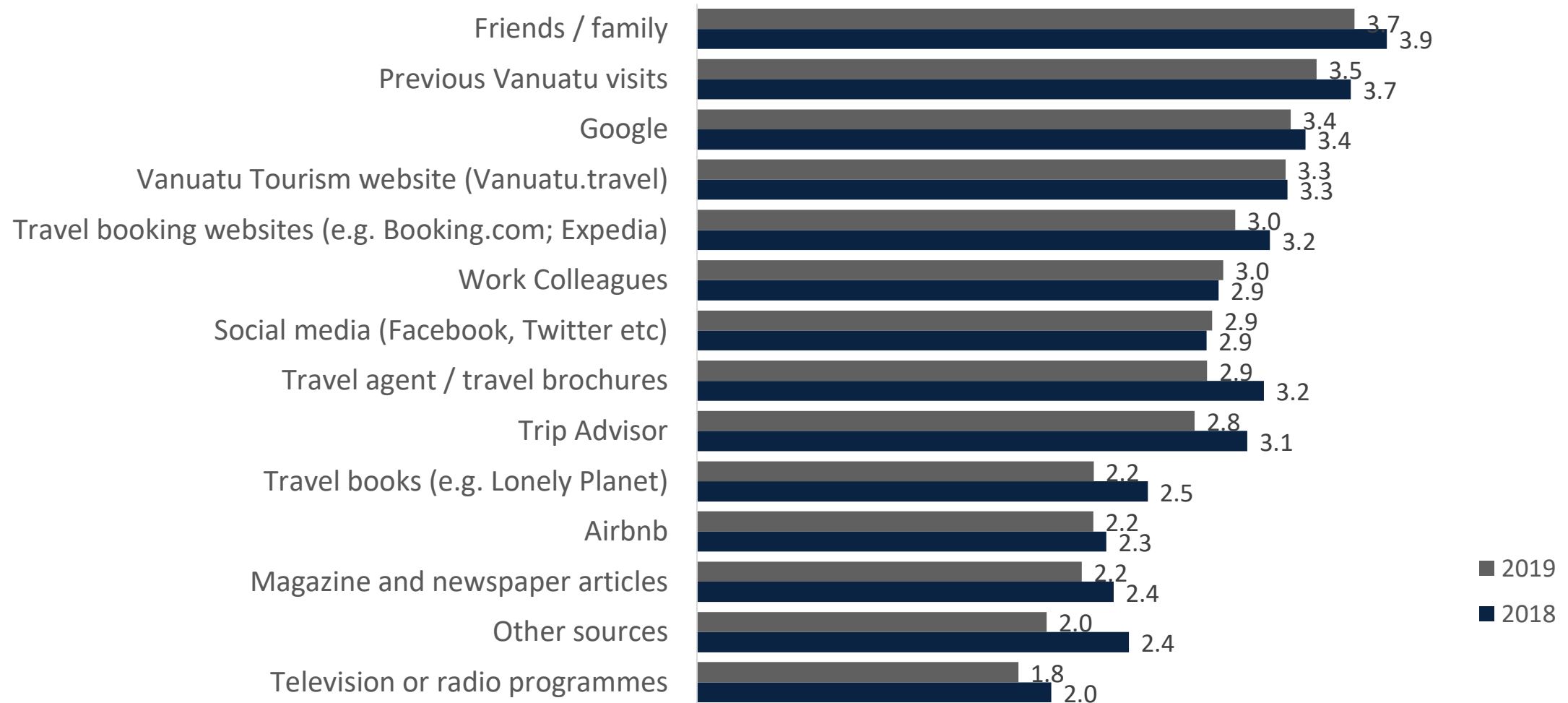
Q How did you find out about the Vanuatu as a destination?



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

IVS 2018-2019: Friends/family is the most important information source for NC visitors. Google is the most important online information source.

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

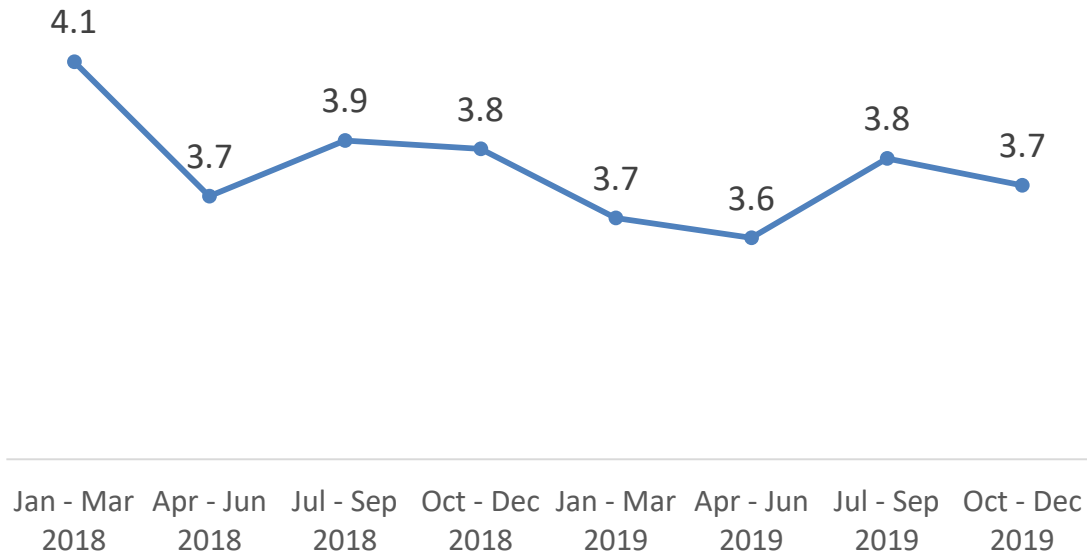


Mean: Very Important=1 to Very Improtant=5

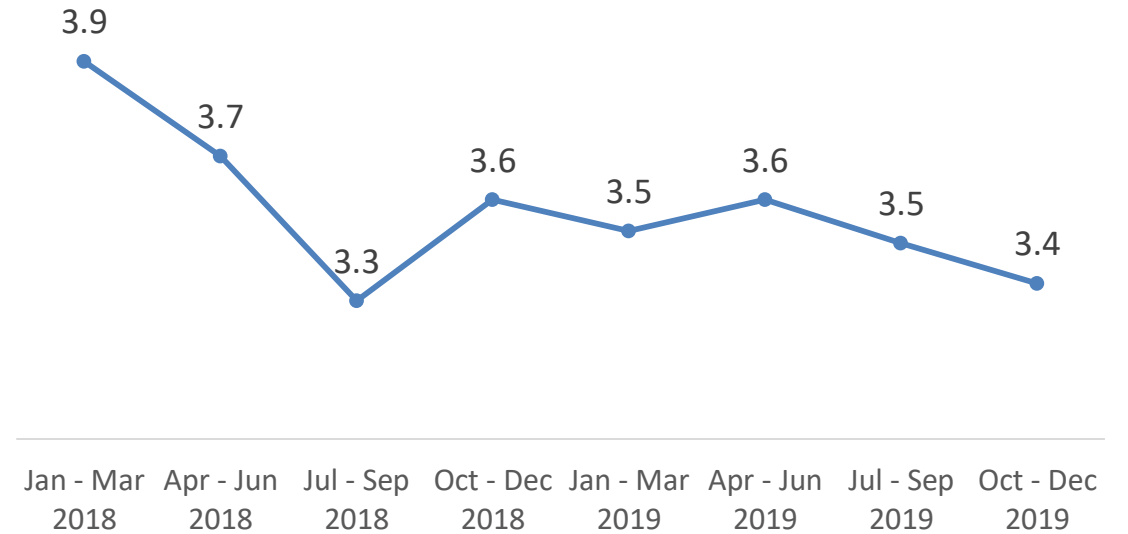
Seasonal Variations: Importance of sources of information when planning trip to Vanuatu

Statement Comparison

Friends / family



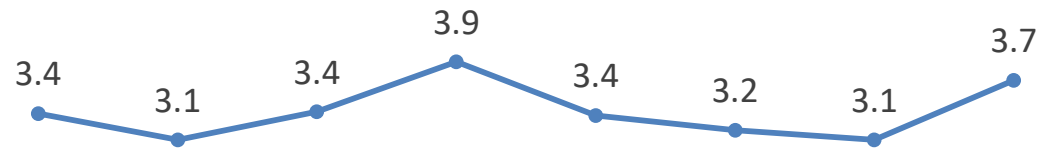
Previous Vanuatu visits



Importance of sources of information when planning trip to Vanuatu

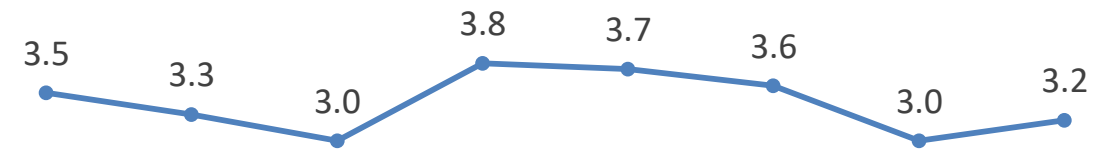
Statement Comparison

Google



Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

Vanuatu Tourism website (Vanuatu.travel)

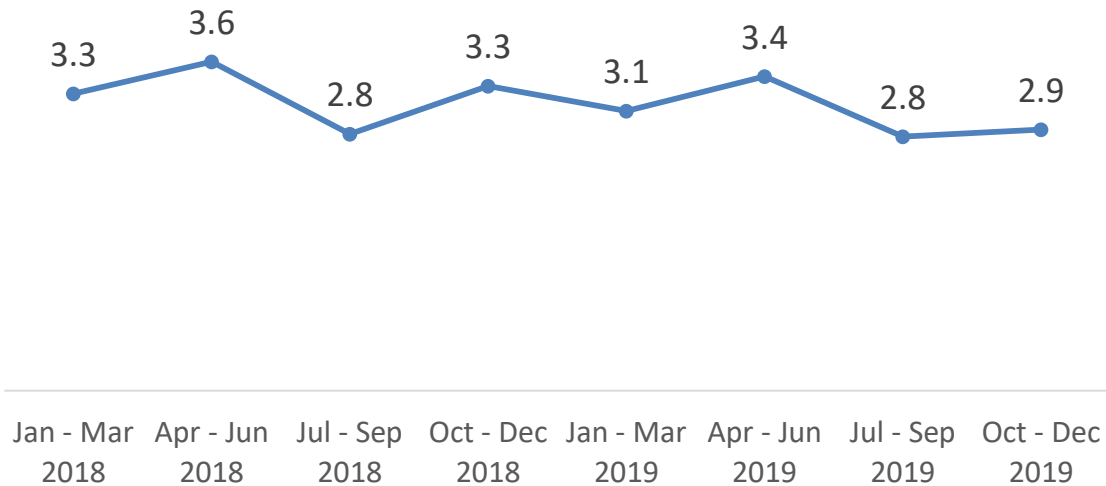


Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

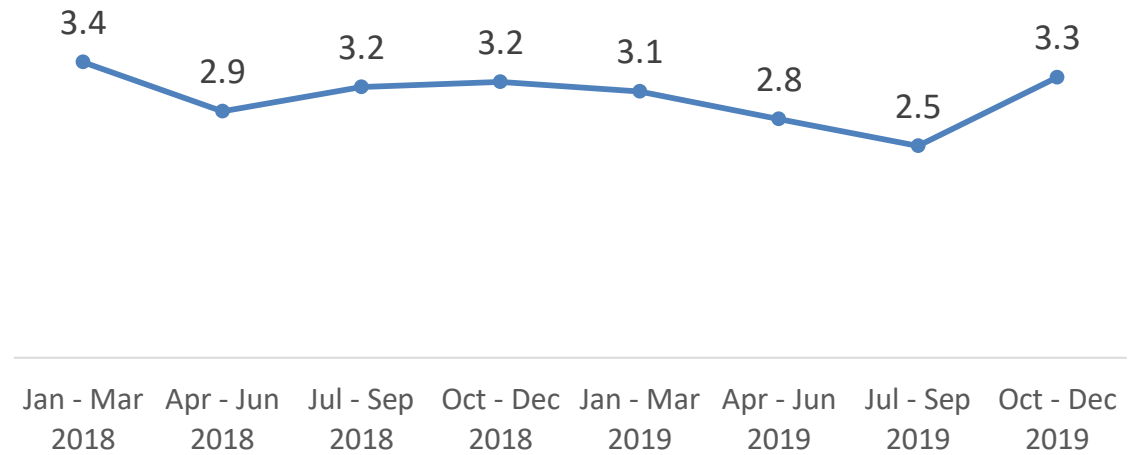
Importance of sources of information when planning trip to Vanuatu

Statement Comparison

Other travel booking websites (e.g. Booking.com; Expedia)



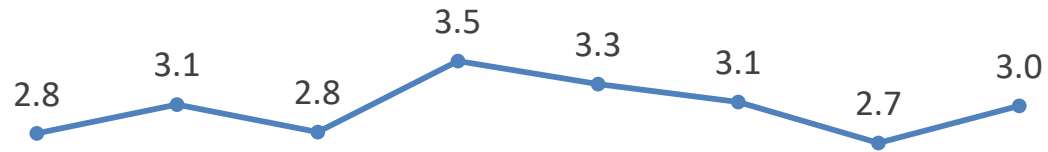
Travel agent / travel brochures



Importance of sources of information when planning trip to Vanuatu

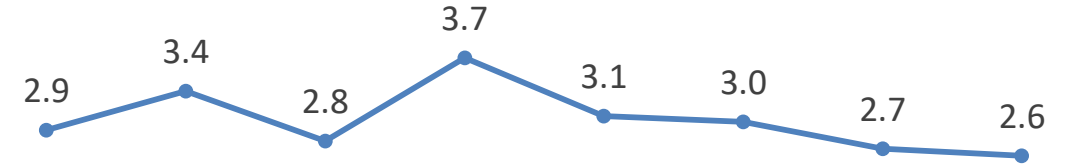
Statement Comparison

Work Colleagues



Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

Trip Advisor

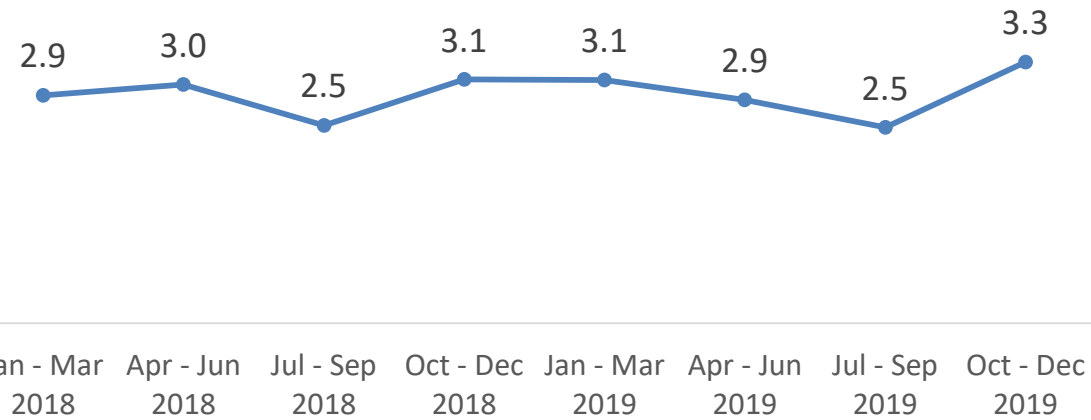


Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

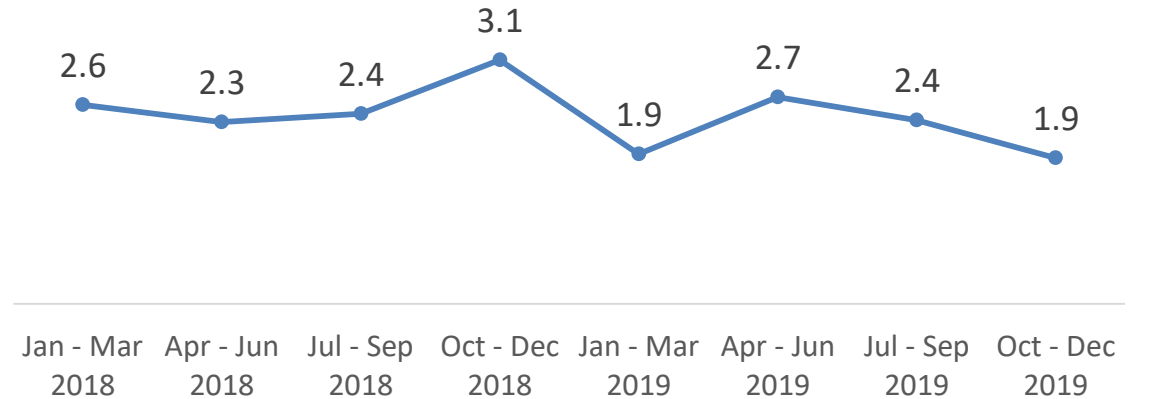
Importance of sources of information when planning trip to Vanuatu

Statement Comparison

Social media (Facebook, Twitter etc)



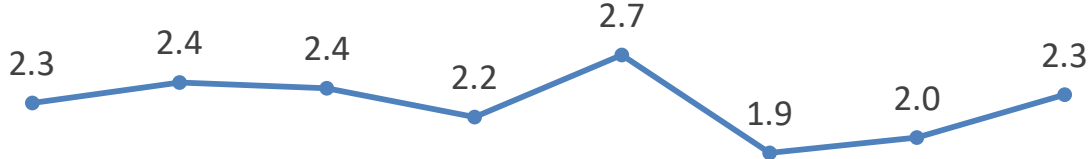
Travel books (e.g. Lonely Planet)



Importance of sources of information when planning trip to Vanuatu

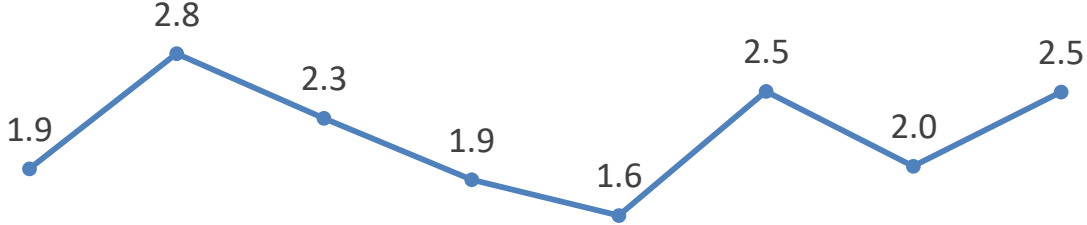
Statement Comparison

Magazine and newspaper articles



Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

Airbnb

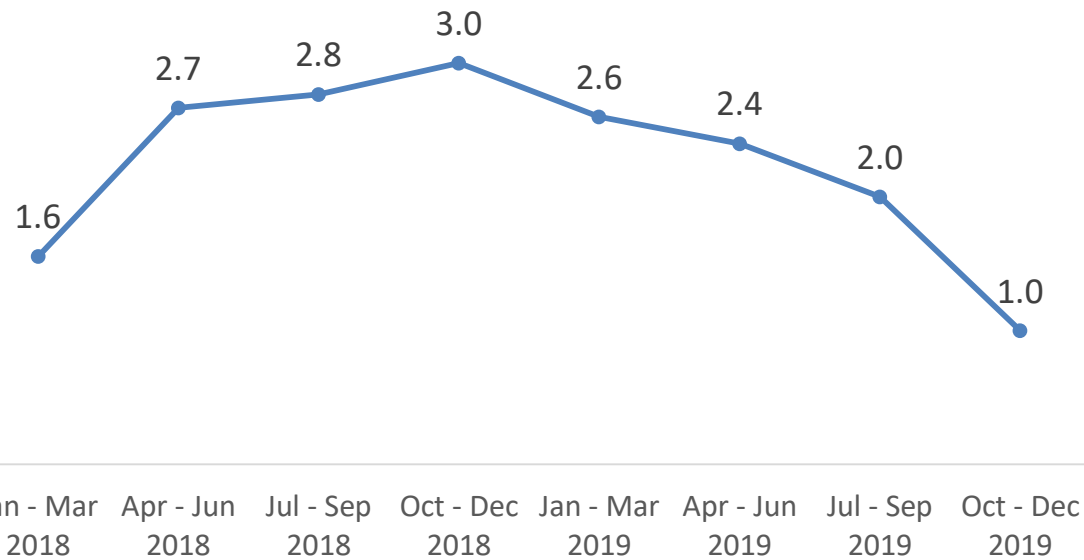


Jan - Mar 2018 Apr - Jun 2018 Jul - Sep 2018 Oct - Dec 2018 Jan - Mar 2019 Apr - Jun 2019 Jul - Sep 2019 Oct - Dec 2019

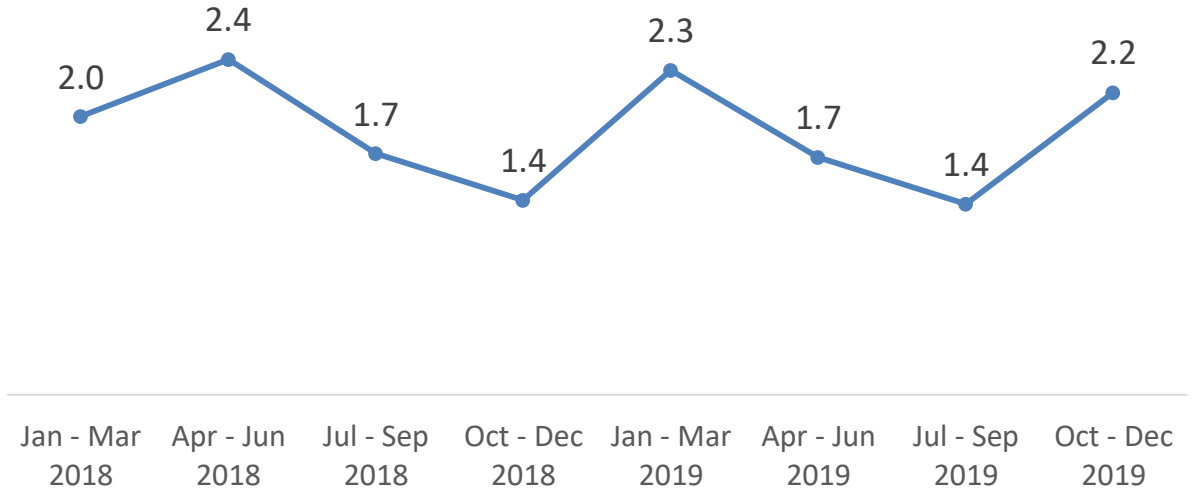
Importance of sources of information when planning trip to Vanuatu

Statement Comparison

Other sources



Television or radio programmes



The majority of NC visitors made their own travel arrangements through an online website or via direct booking with hotels/airlines.

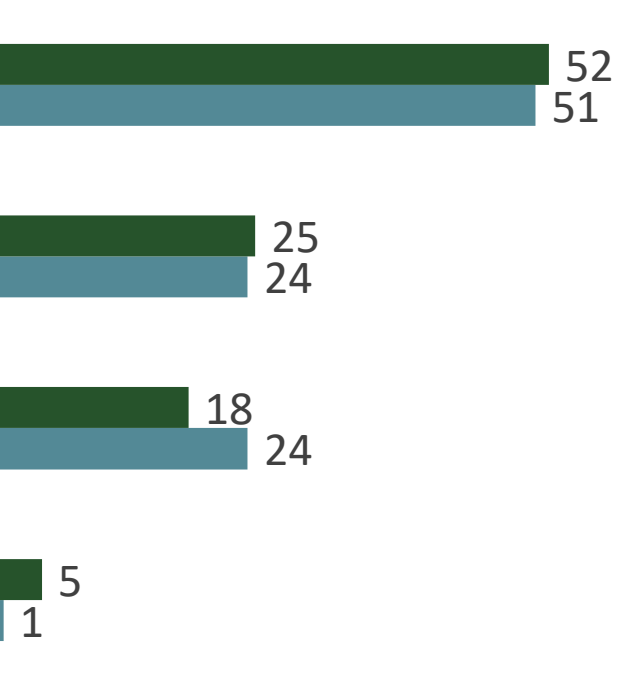
Q How did you purchase your travel?

I made my own travel arrangement (through online website or booked with hotels/airlines)

I purchased a pre-paid travel package through a travel agent

Travel arrangements were made by others (business, friends, relatives)

Other



Share of Visitors (%)

2017 2016

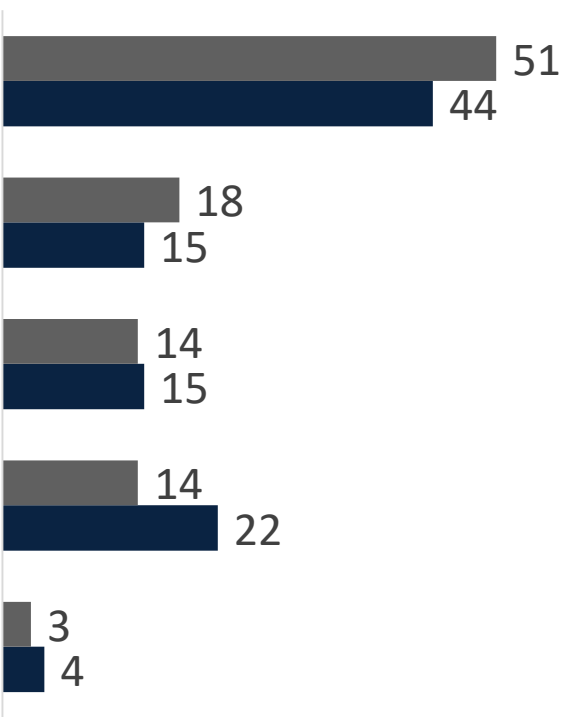
Through a travel booking website (e.g Booking.com, Expedia)

Direct with airlines and / or accommodation places

Travel arrangements were made by others

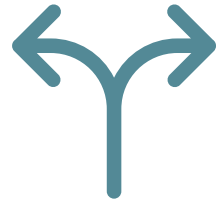
Through a travel agent store

Other



Share of Visitors (%)

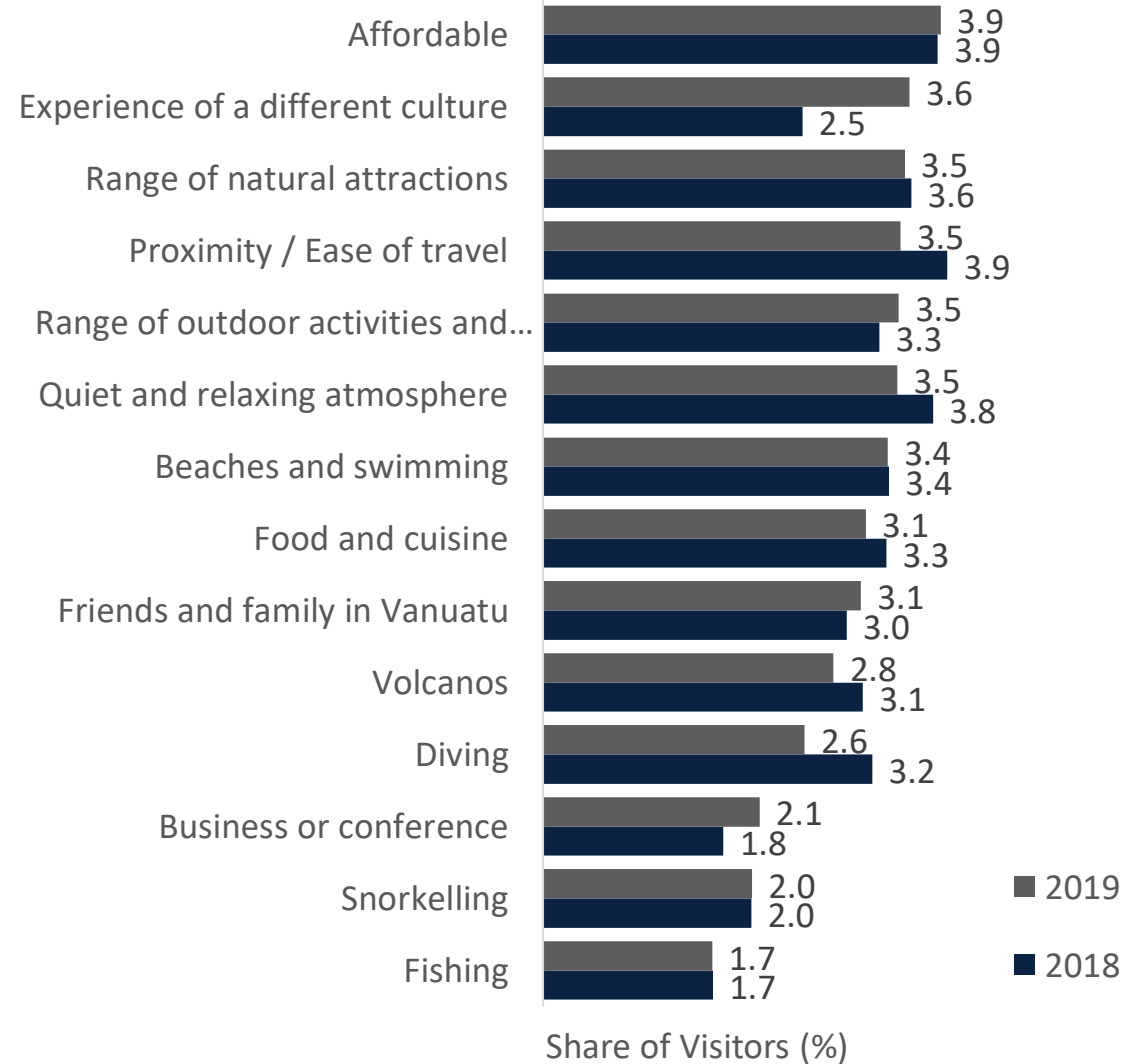
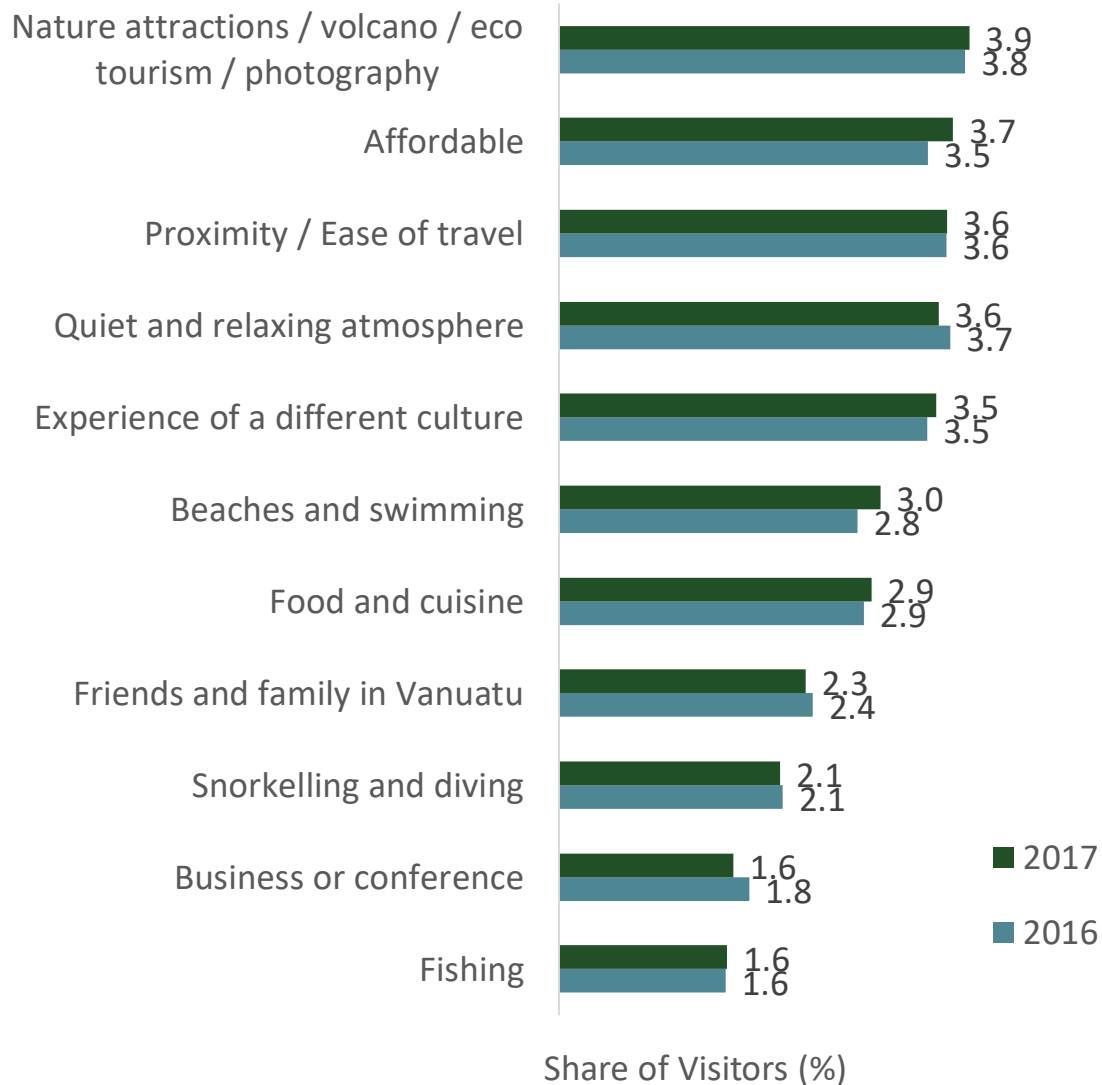
2019 2018



Factors Influencing the decision to visit Vanuatu

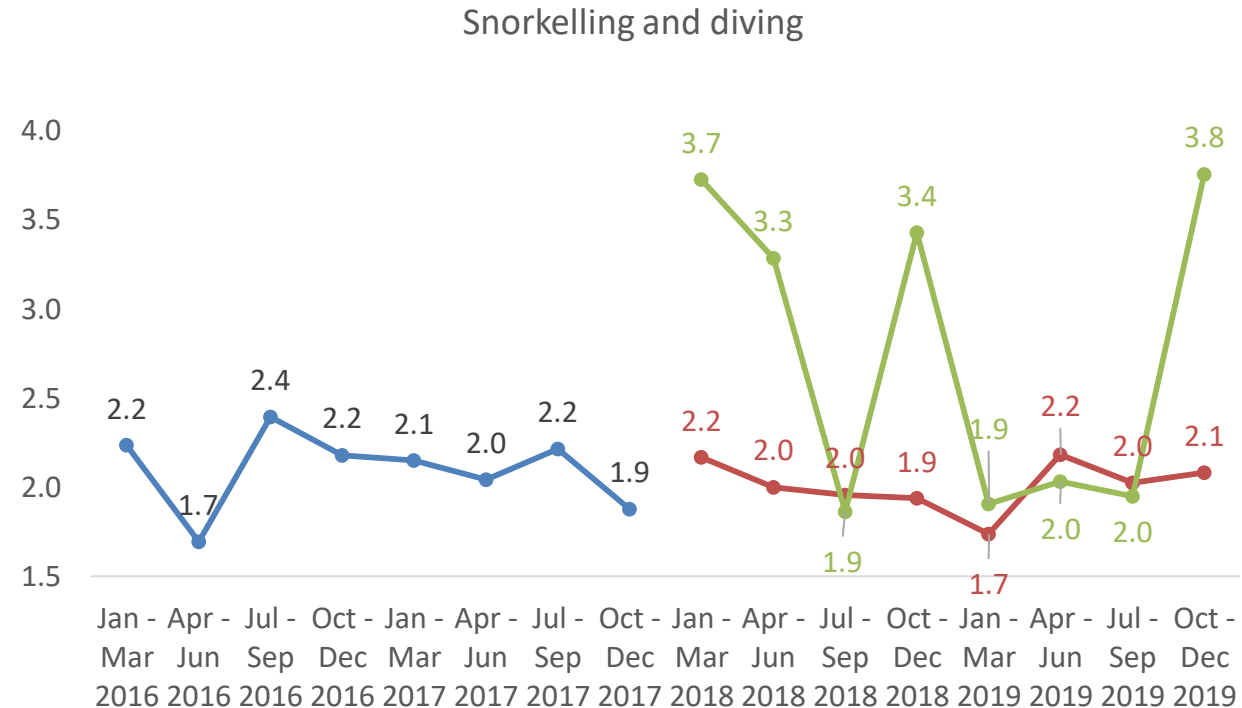
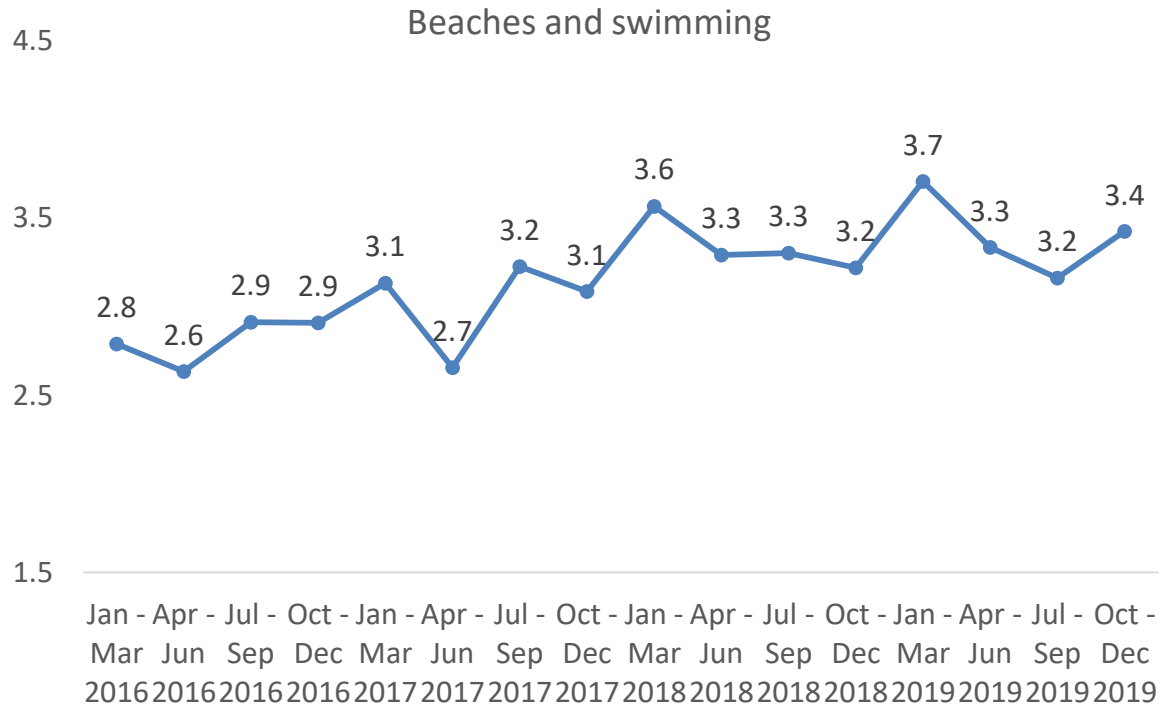
2016-2017 IVS: The affordability of travel to Vanuatu is the most influential factor for NC visitors from IVS 2018-2019.

Q How influential were the following factors in your decision to visit Vanuatu?



Factors influencing the choice to visit Vanuatu

Statement Comparison

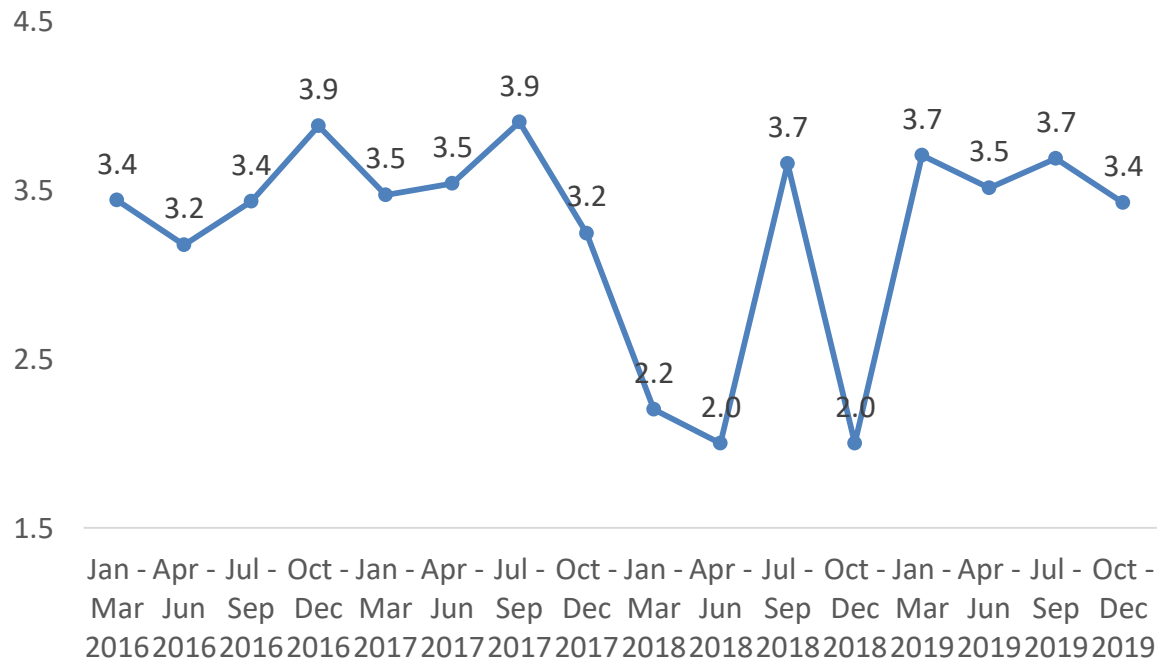


- 2016-17 Snorkelling and diving
- 2018-19 Snorkelling
- 2018-19 Diving

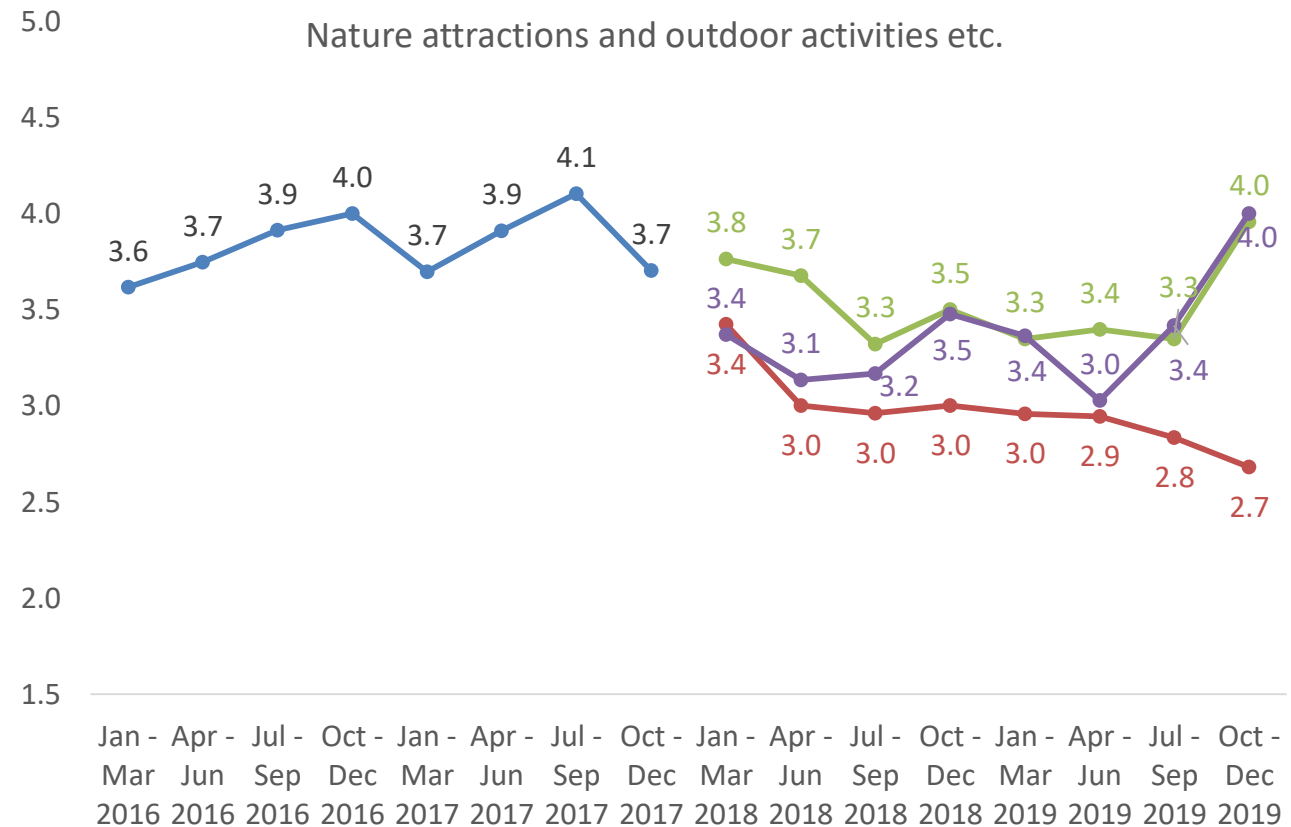
Factors influencing the choice to visit Vanuatu

Statement Comparison

Experience of a different culture



Nature attractions and outdoor activities etc.

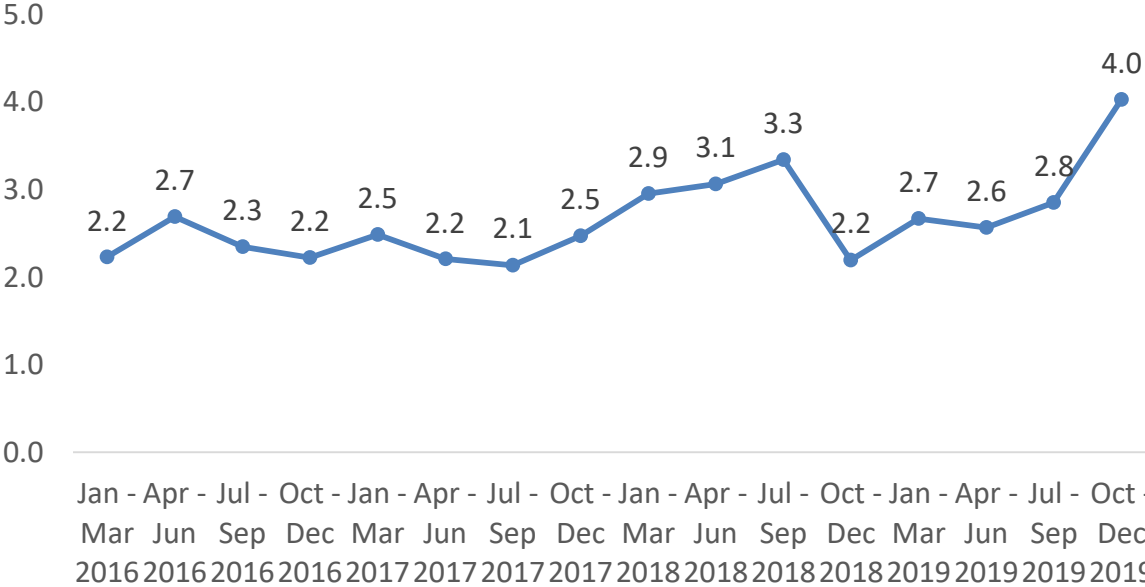


- 2016-17 Nature attractions / volcano / eco tourism / photography
- 2018-19 Volcanos
- 2018-19 Range of natural attractions
- 2018-19 Range of outdoor activities and experiences

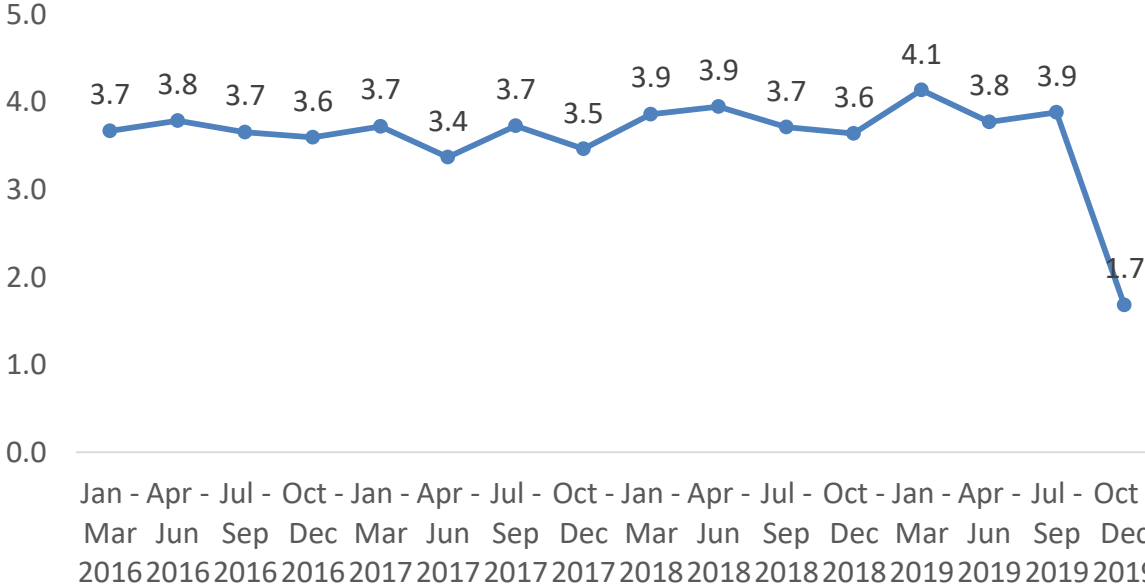
Factors influencing the choice to visit Vanuatu

Statement Comparison

Friends and family in Vanuatu

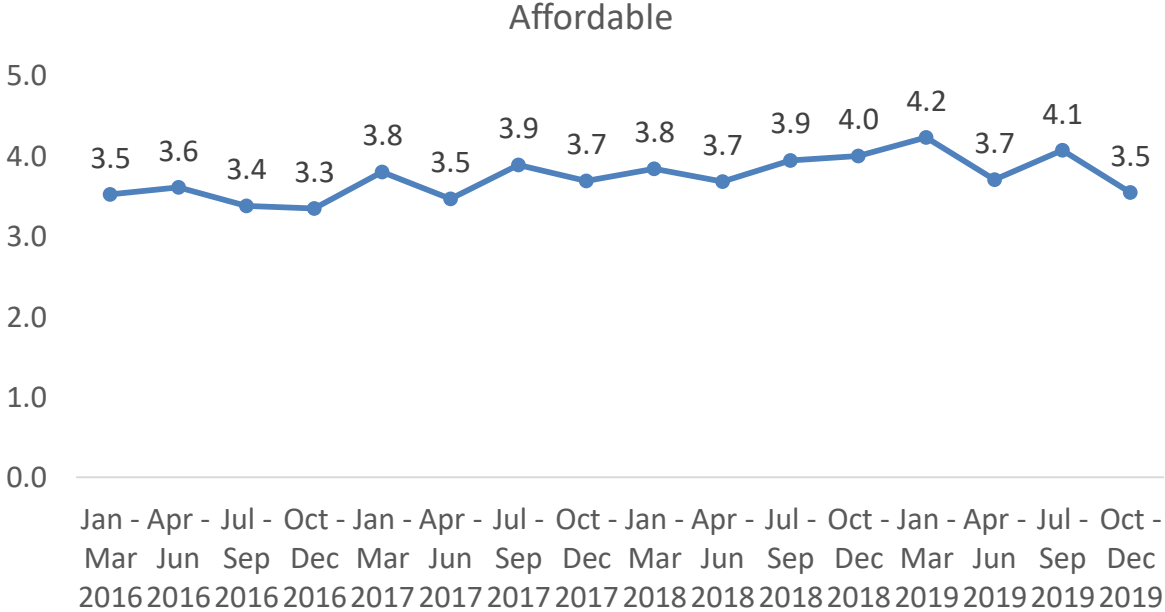
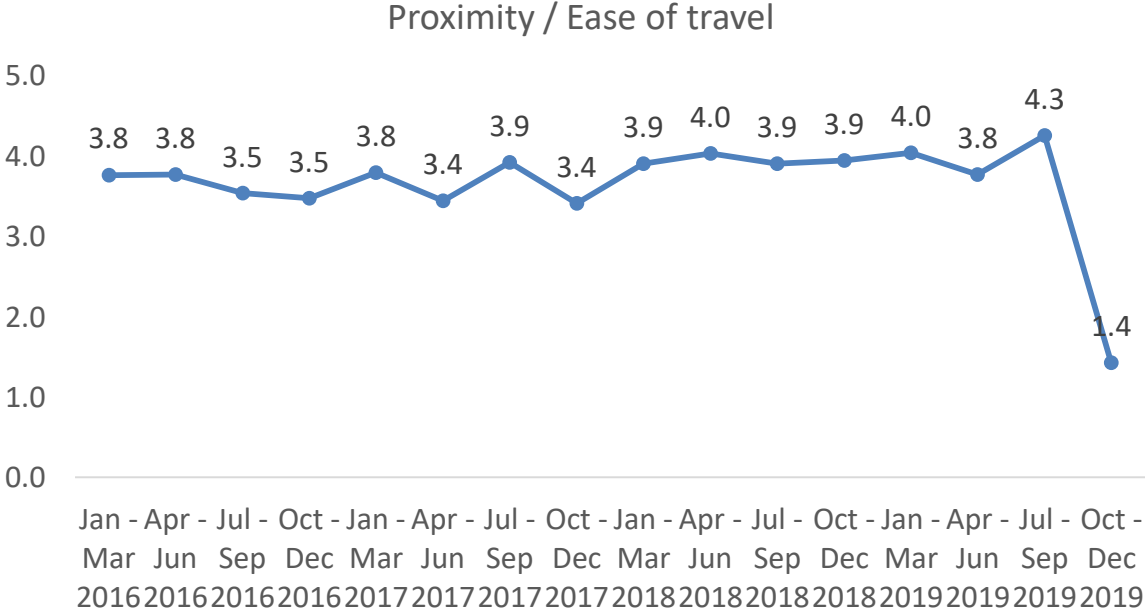


Quiet and relaxing atmosphere



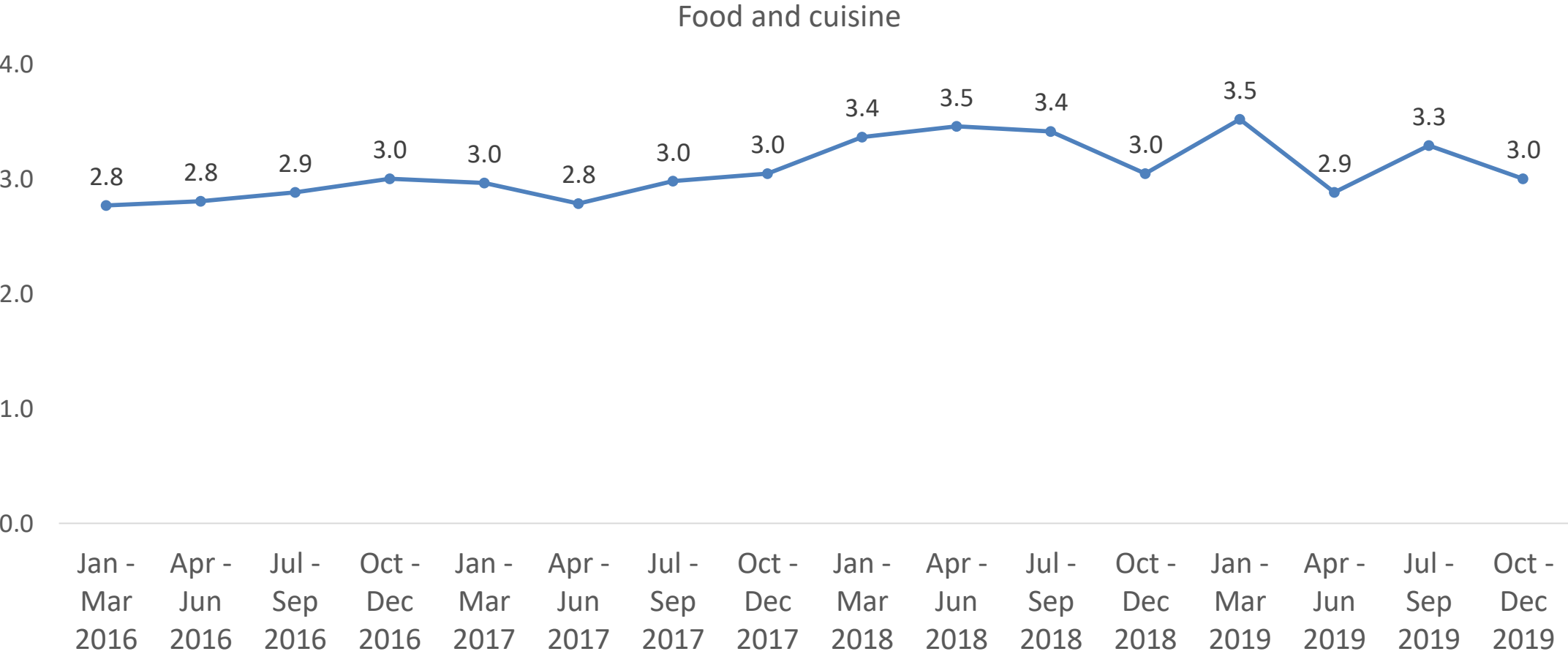
Factors influencing the choice to visit Vanuatu

Statement Comparison



Factors influencing the choice to visit Vanuatu

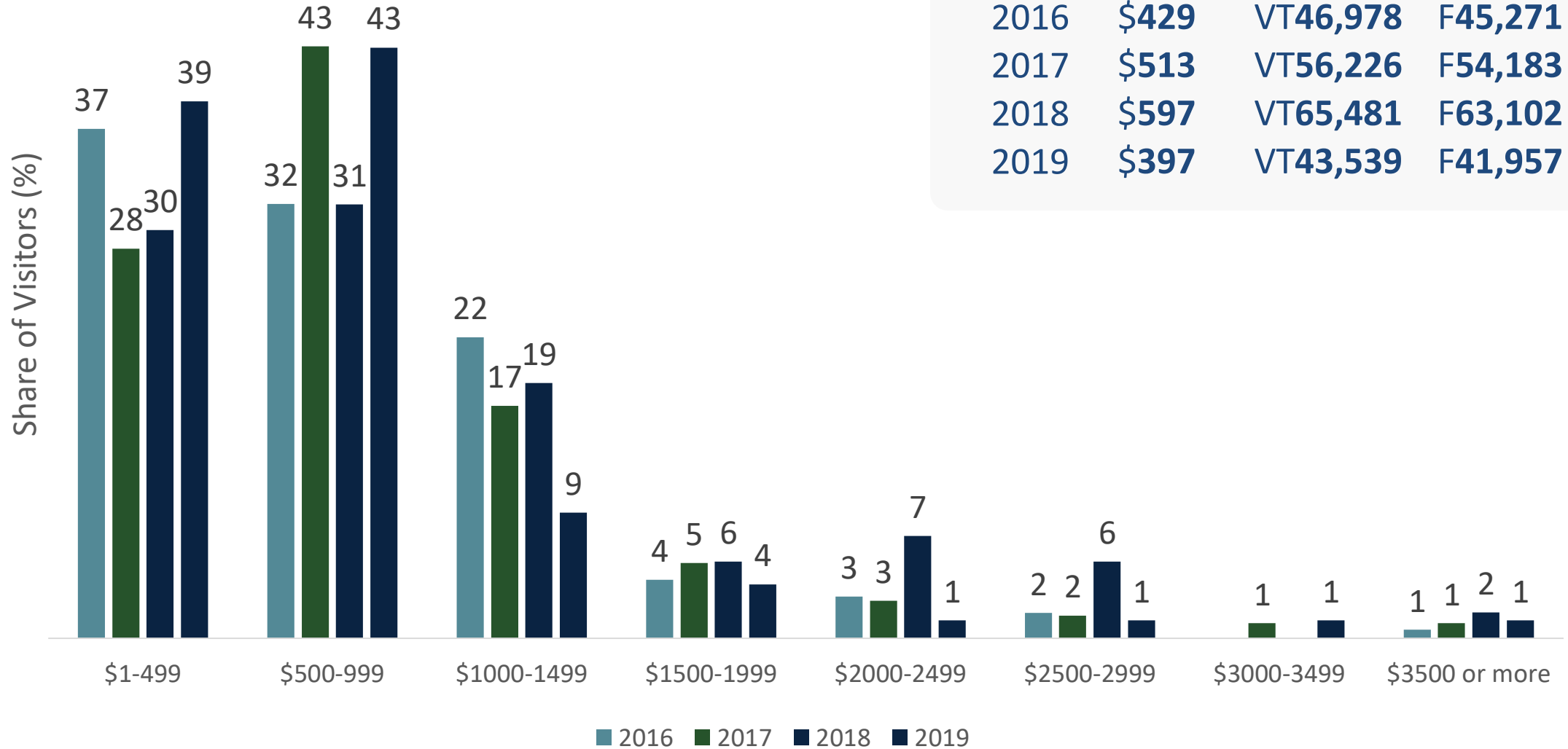
Statement Comparison





Visitor Spending and Impact

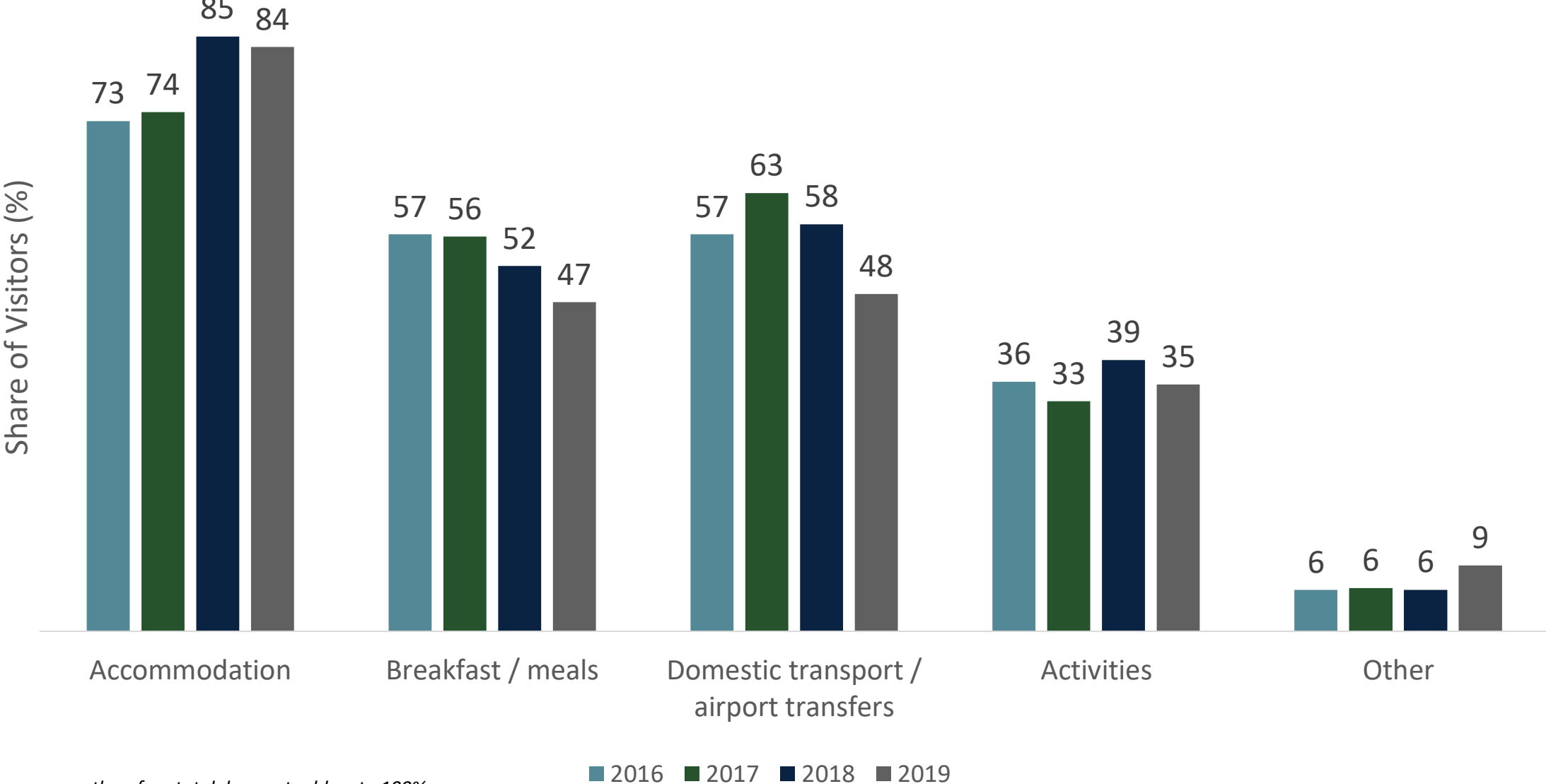
Prepaid expenditure for NC visitors (per person)



AVERAGE PREPAID PER PERSON			
2016	\$429	VT46,978	F45,271
2017	\$513	VT56,226	F54,183
2018	\$597	VT65,481	F63,102
2019	\$397	VT43,539	F41,957

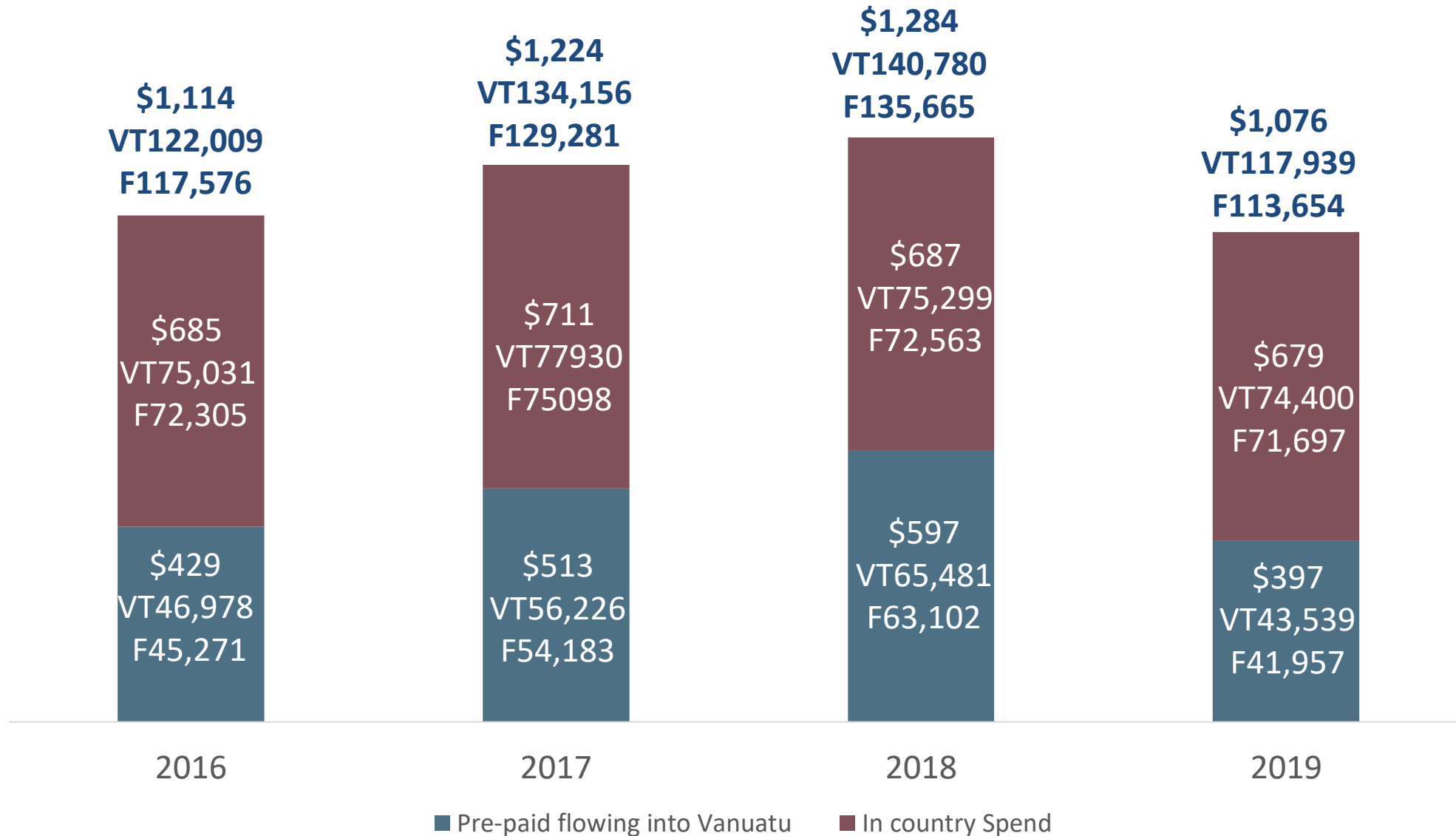
Note: Percentage figures are rounded

Prepaid items are dominated by accommodation, meals and domestic transport





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

NC Expenditure Per Person Per Visit



Economic Impacts: Per Person and Total

		PRE-PAID SPEND FLOWING INTO LOCAL ECONOMY (est. 62.5%)	+	IN-COUNTRY SPEND	=	TOTAL ECONOMIC IMPACT
		USD/VT/XPF		USD/VT/XPF		USD/VT/XPF
 PER DAY	2016	69/7572/7297		110/12094/11654		179/19666/18951
	2017	80/8744/ 8426		111/12119/11679		190/20863/20105
	2018	92/10040/9675		105/11545/11126		197/21586/20801
	2019	68/7426/ 7157		116/12690/12229		184/20117/19386
 PER TRIP	2016	429/46978/45271		685/75031/72305		1114/122009/117576
	2017	513/56226/54183		711/77930/75098		1224/134156/129281
	2018	597/65481/63102		687/75299/72563		1284/140780/135665
	2019	397/43539/41957		679/74400/71697		1076/117939/113654

Note: USD/VUV in the table.

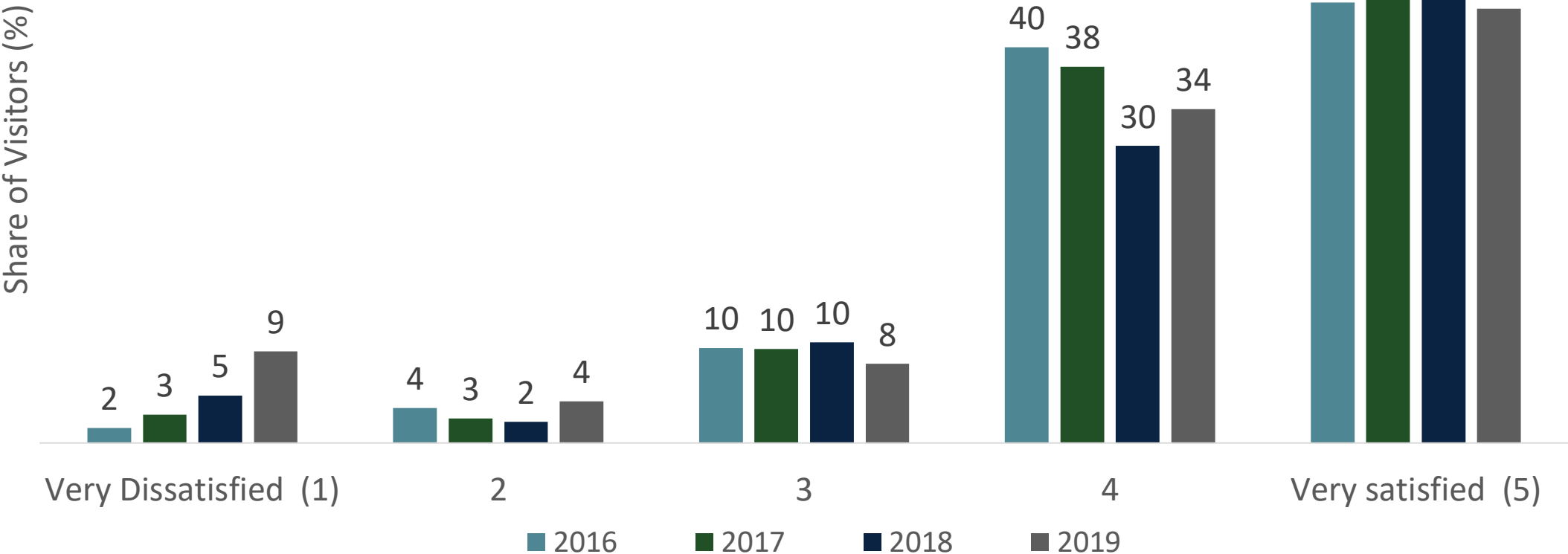


Overall satisfaction and visitor experience

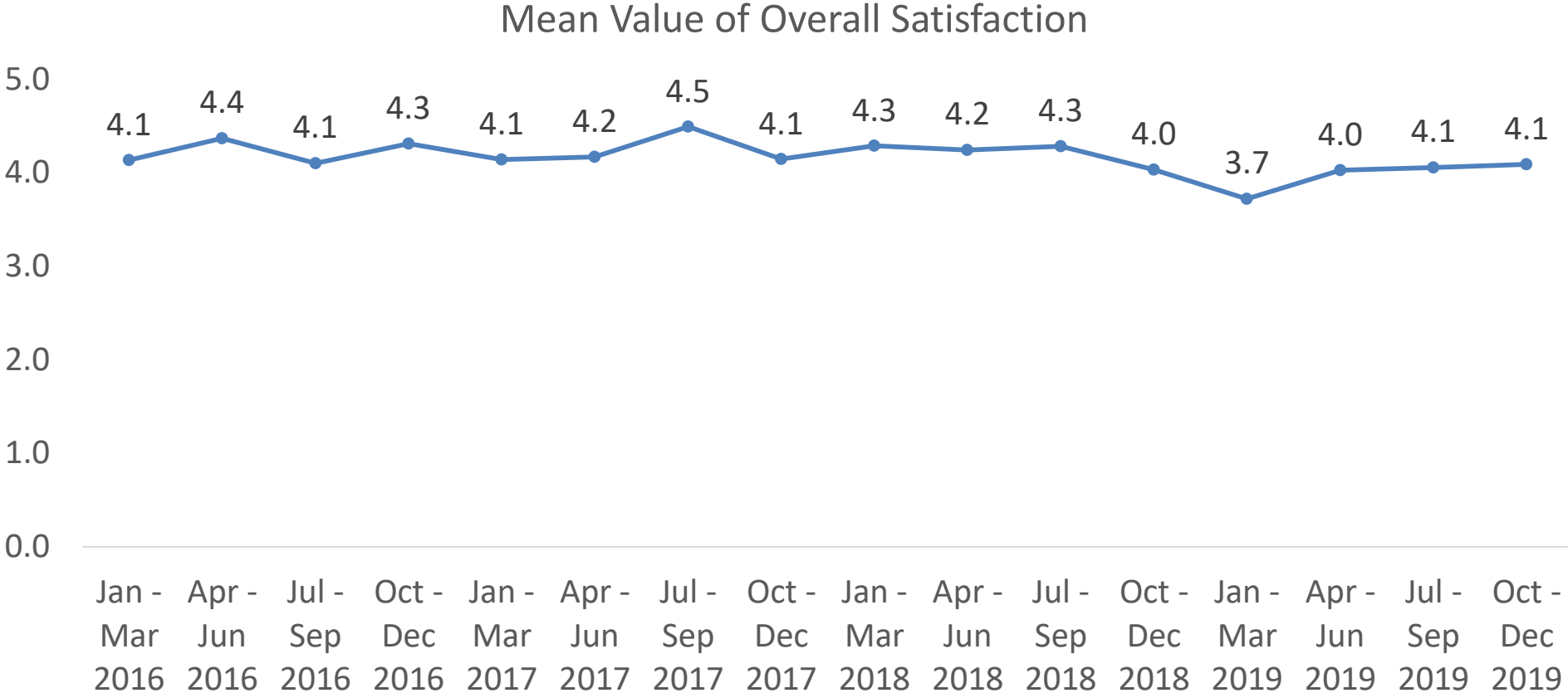
Overall satisfaction of NC visitors was stable over the period but dropped slightly in 2019.

OVERALL SATISFACTION

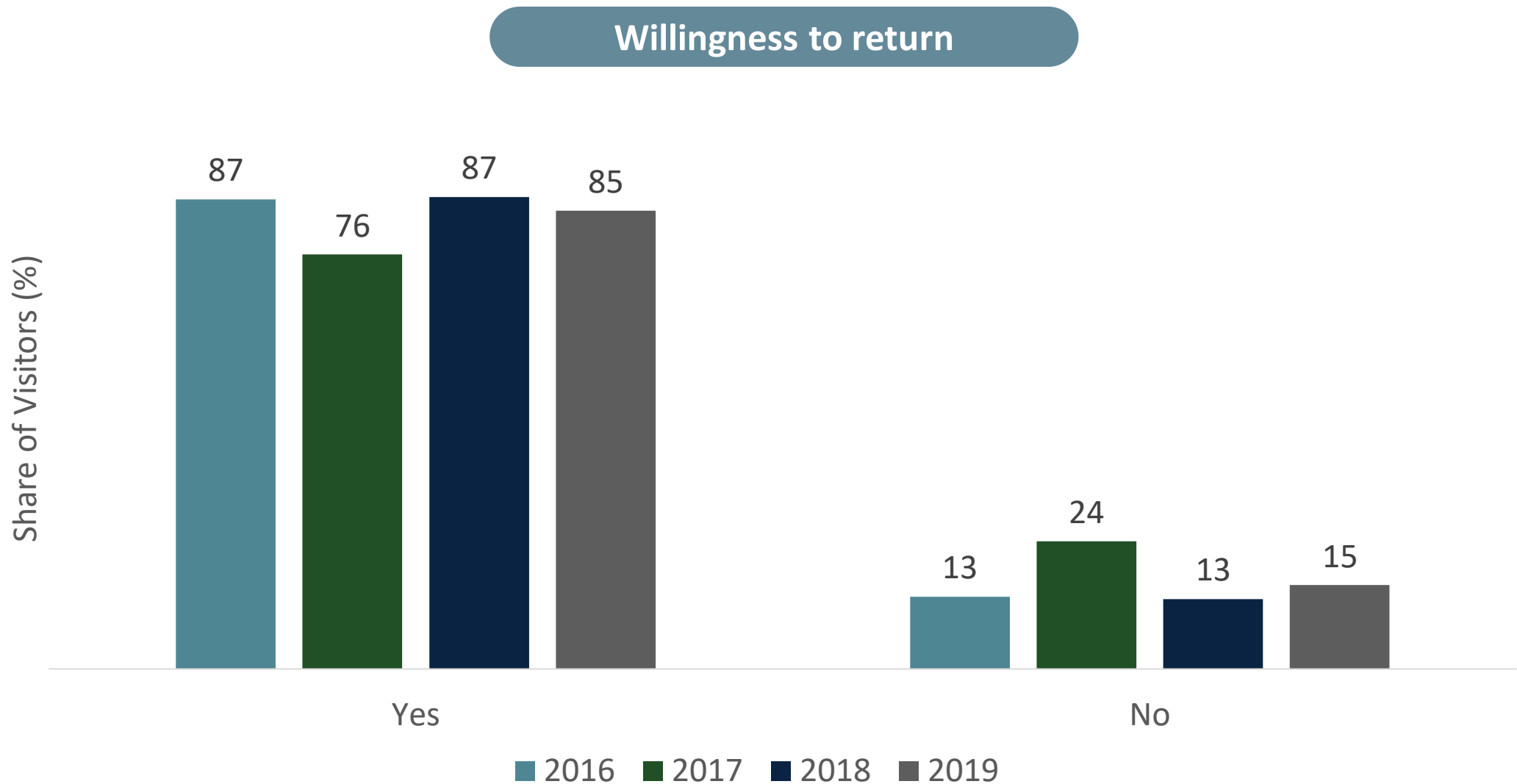
4.2	4.2	4.2	4.0
2016	2017	2018	2019



NC visitors' overall satisfaction with their Vanuatu visit has been relatively consistent across seasons.

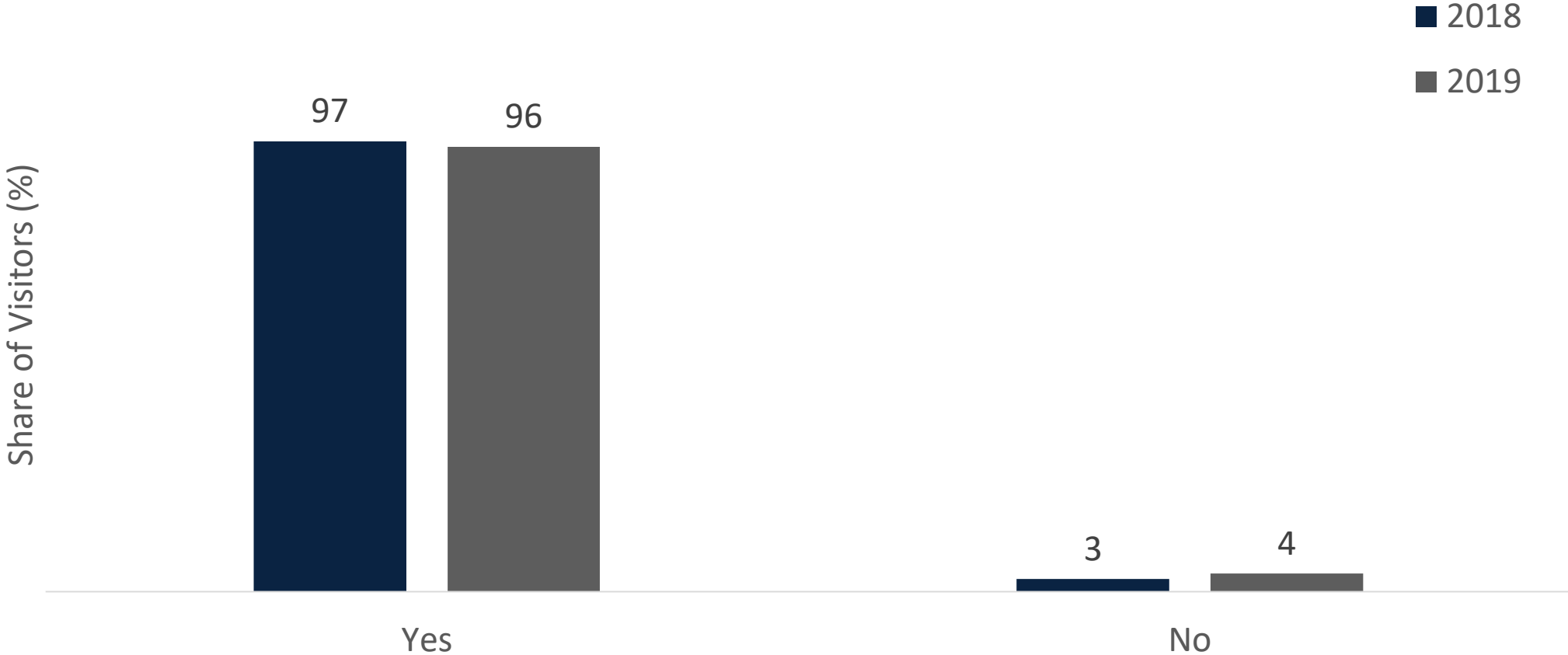


Willingness to return has been stable for NC visitors, with the exception of 2017.

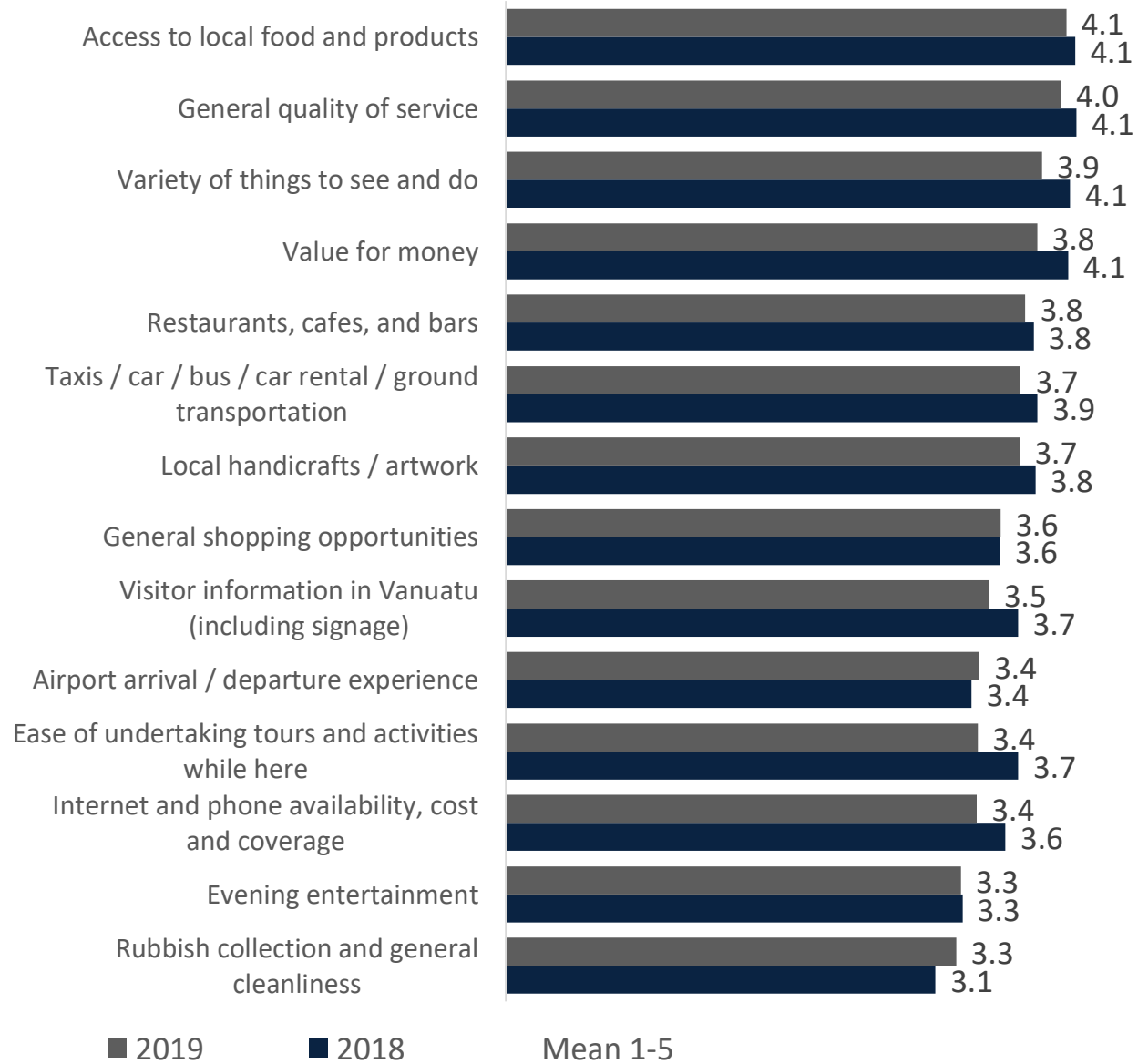
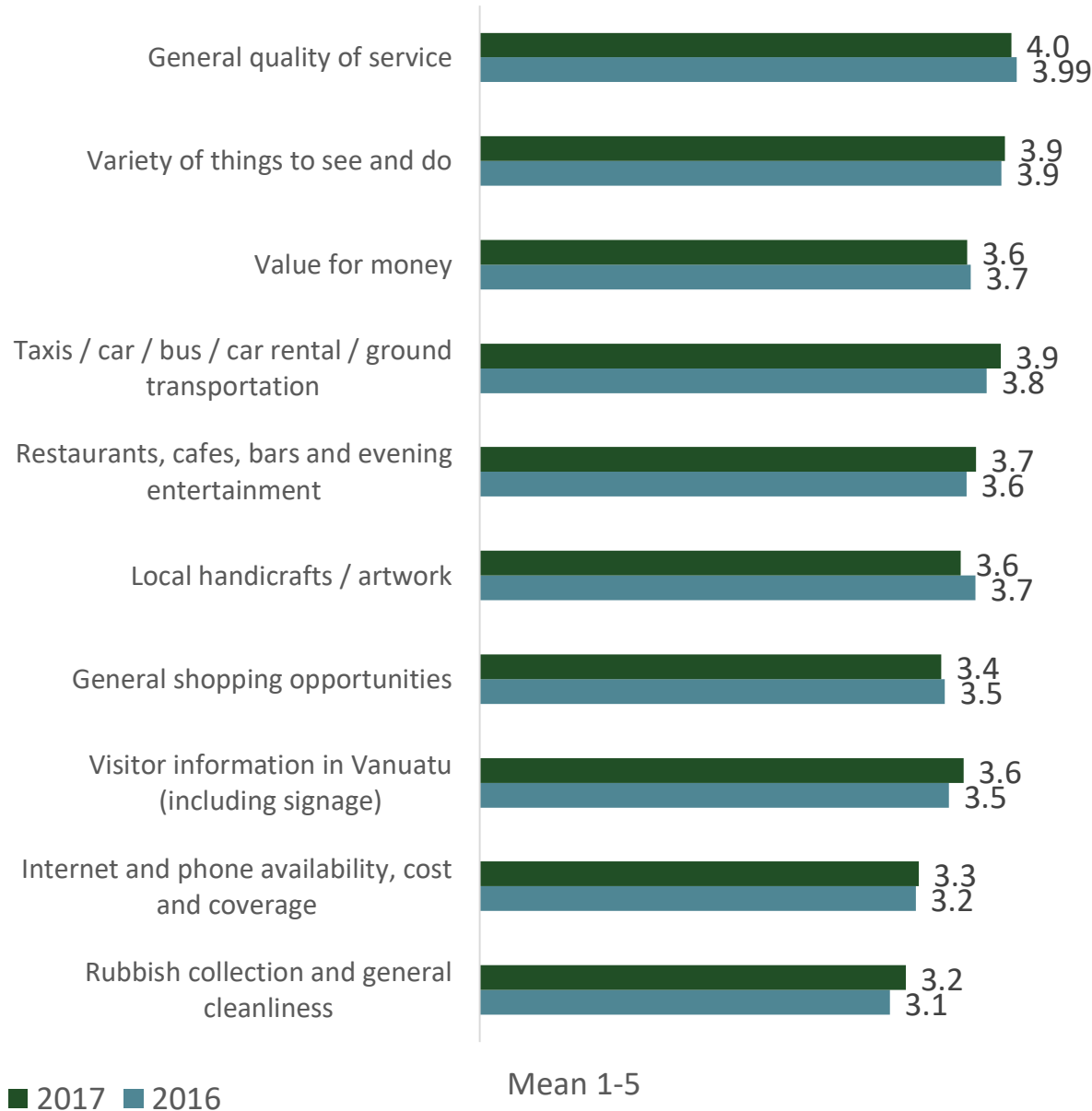


IVS 2018-2019: NC visitors consistently exhibit a high willingness to recommend Vanuatu

Willingness to recommend

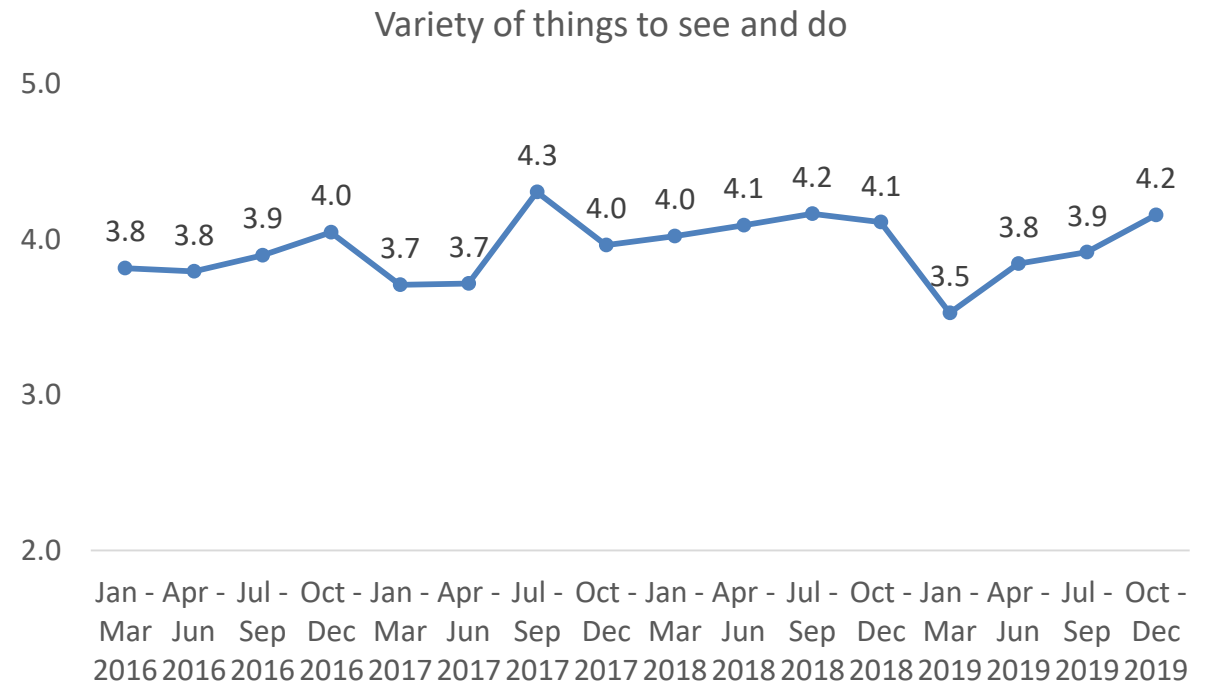
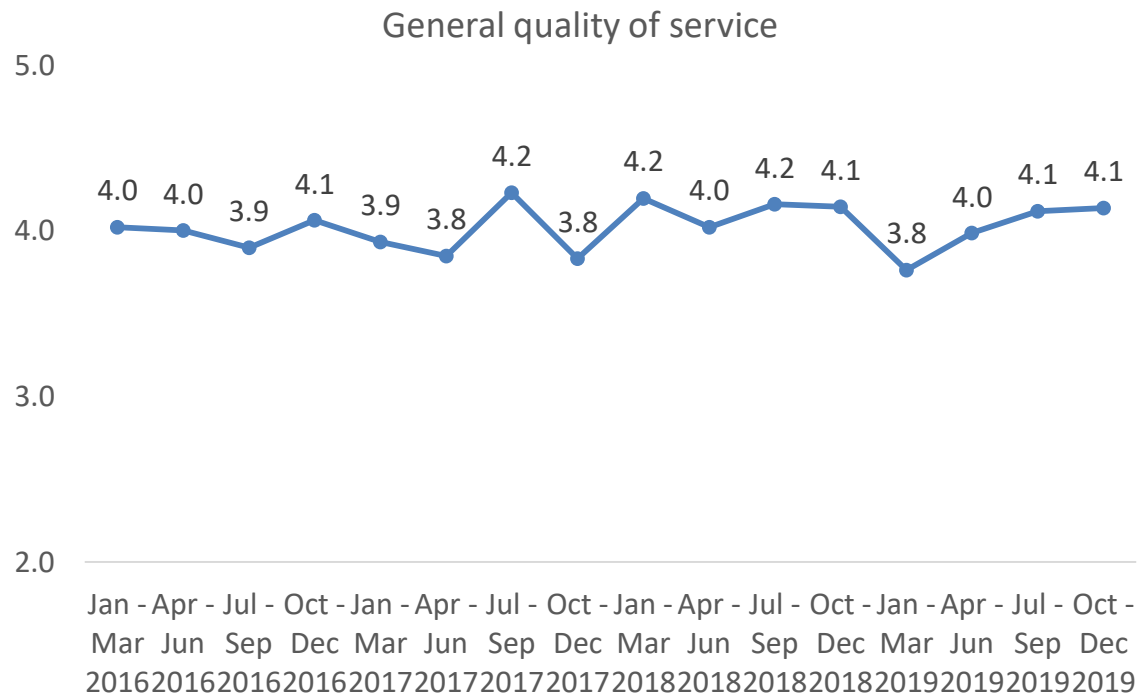


NC visitors are most satisfied with the general quality of service and least satisfied with rubbish and general cleanliness.



Visitor Satisfaction with elements of the Vanuatu travel experience

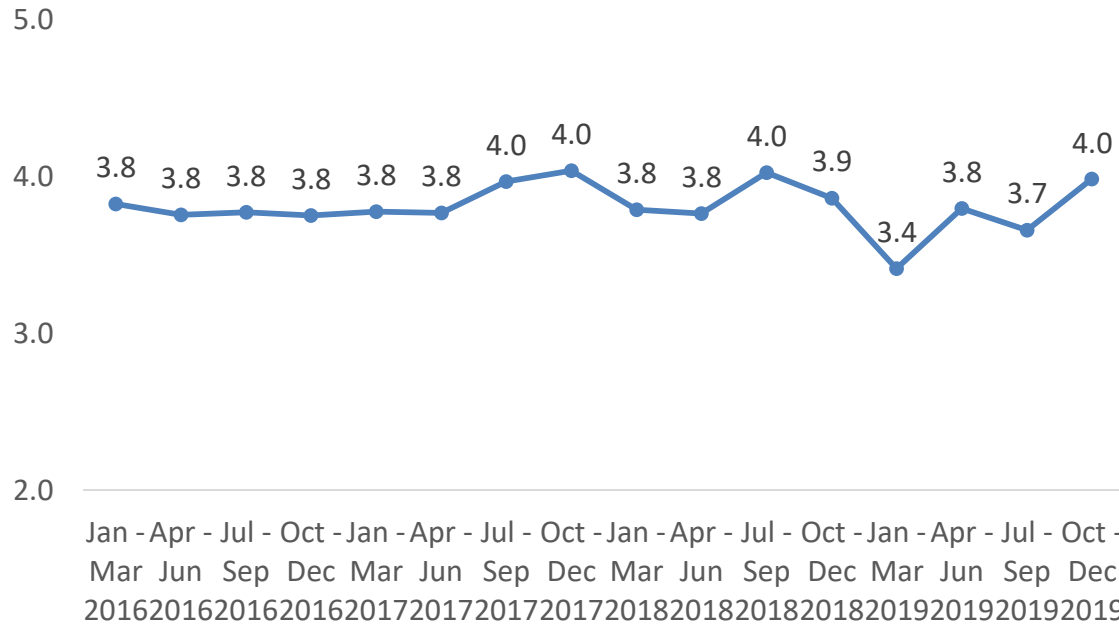
Statement Comparison



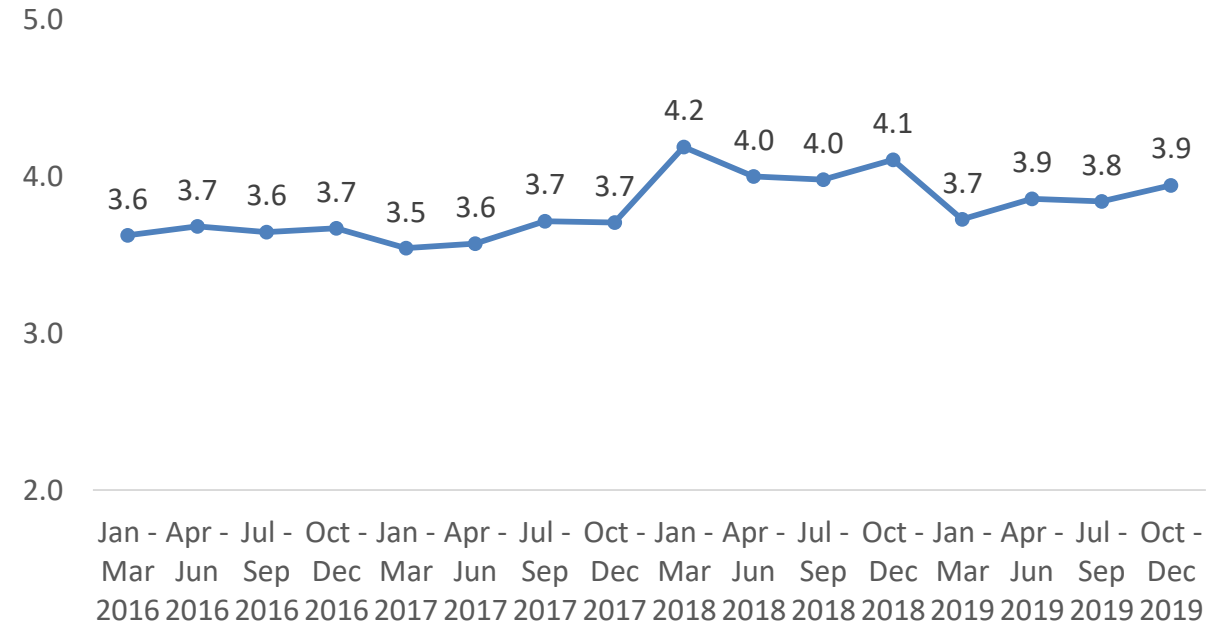
Visitor Satisfaction with elements of the Vanuatu travel experience

Statement Comparison

Taxis / car / bus / car rental / ground transportation



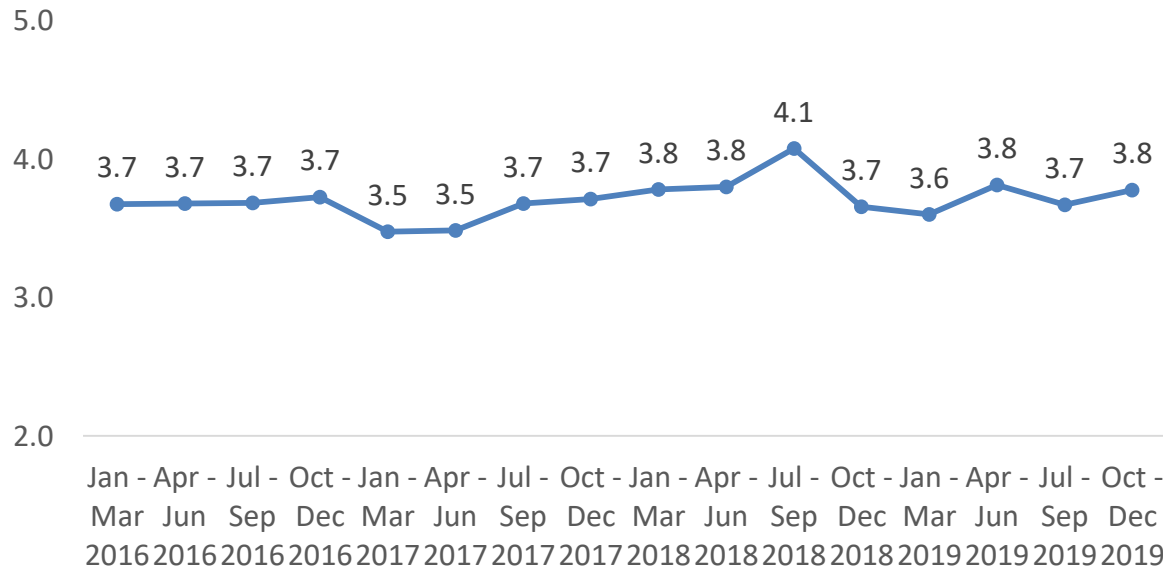
Value for money



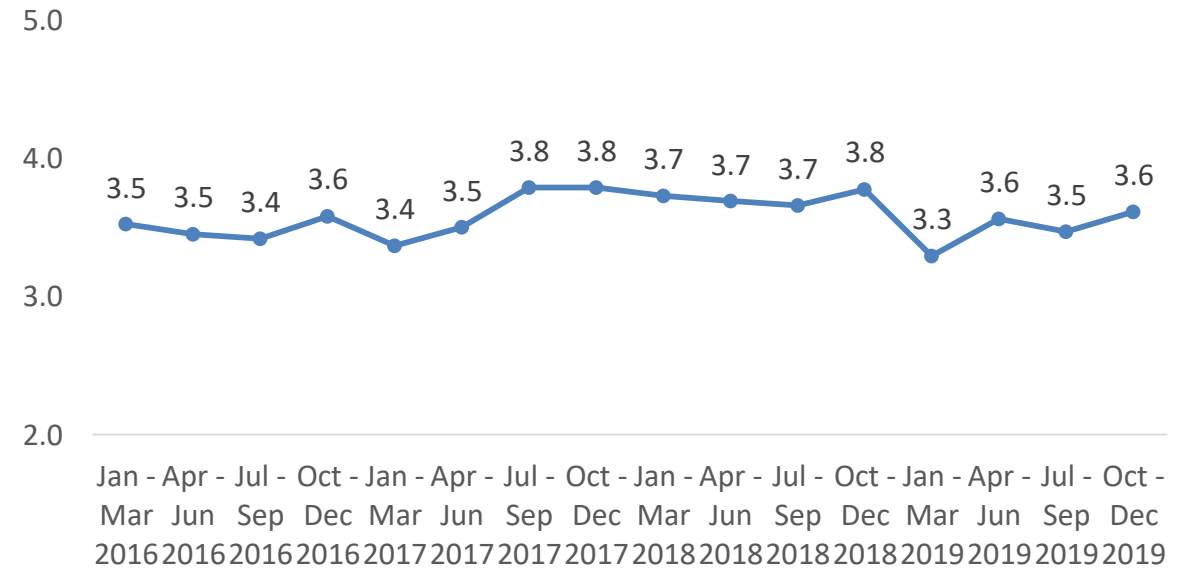
Visitor Satisfaction with elements of the Vanuatu travel experience

Statement Comparison

Local handicrafts / artwork



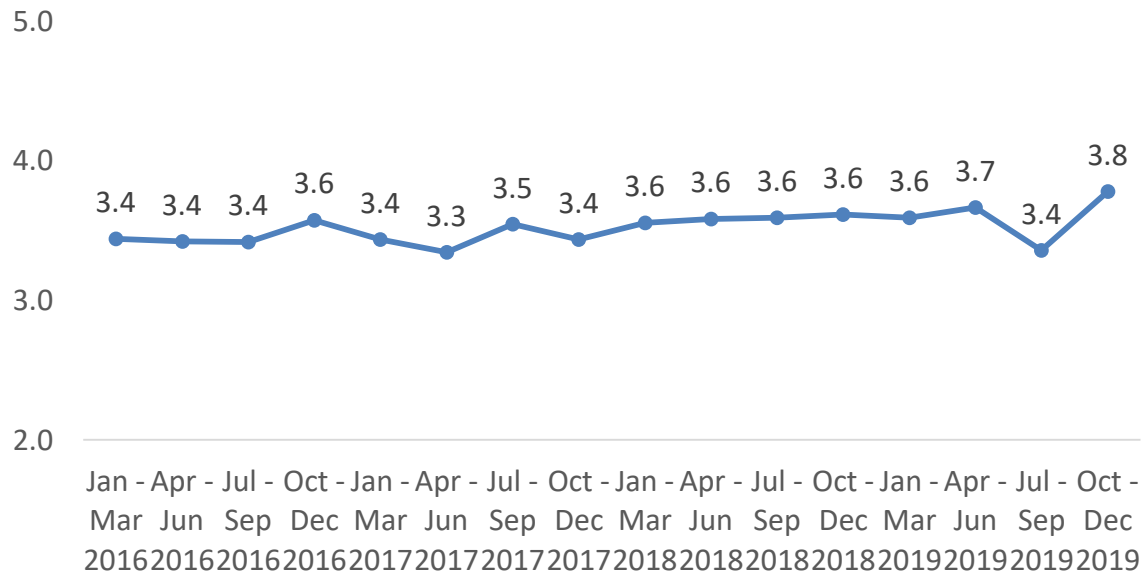
Visitor information in Vanuatu (including signage)



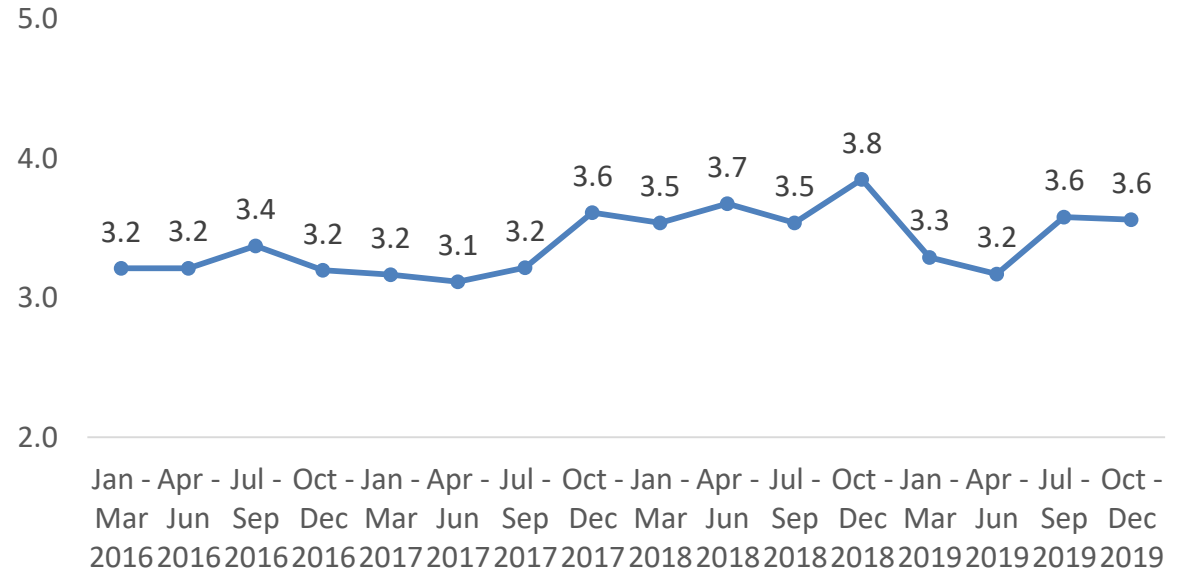
Visitor Satisfaction with elements of the Vanuatu travel experience

Statement Comparison

General shopping opportunities



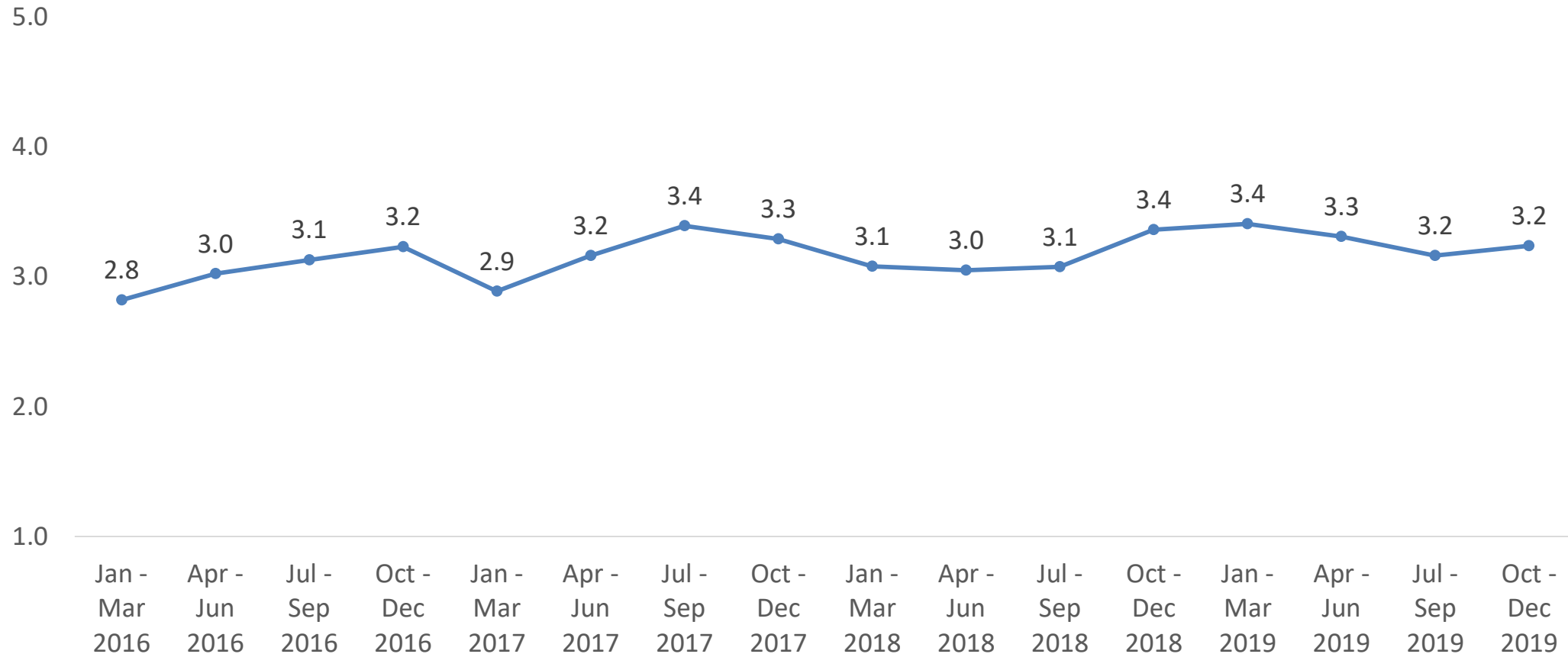
Internet and phone availability, cost and coverage



Visitor Satisfaction with elements of the Vanuatu travel experience

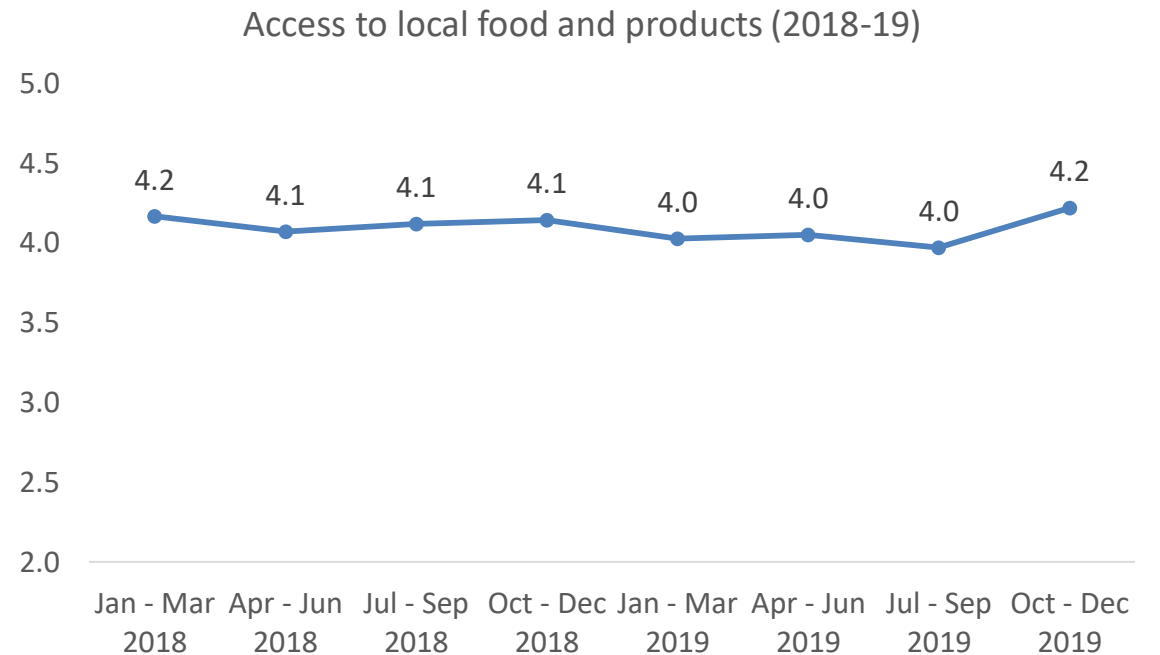
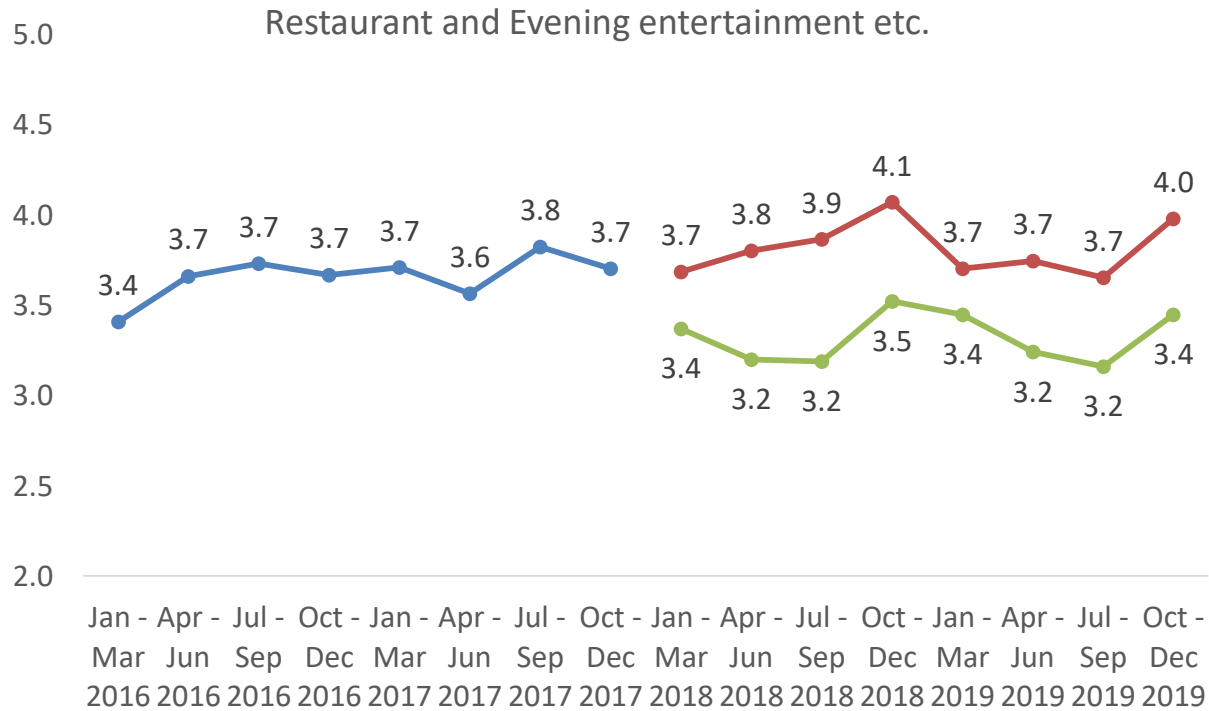
Statement Comparison

Rubbish collection and general cleanliness



Visitor Satisfaction with elements of the Vanuatu travel experience

Statement Comparison

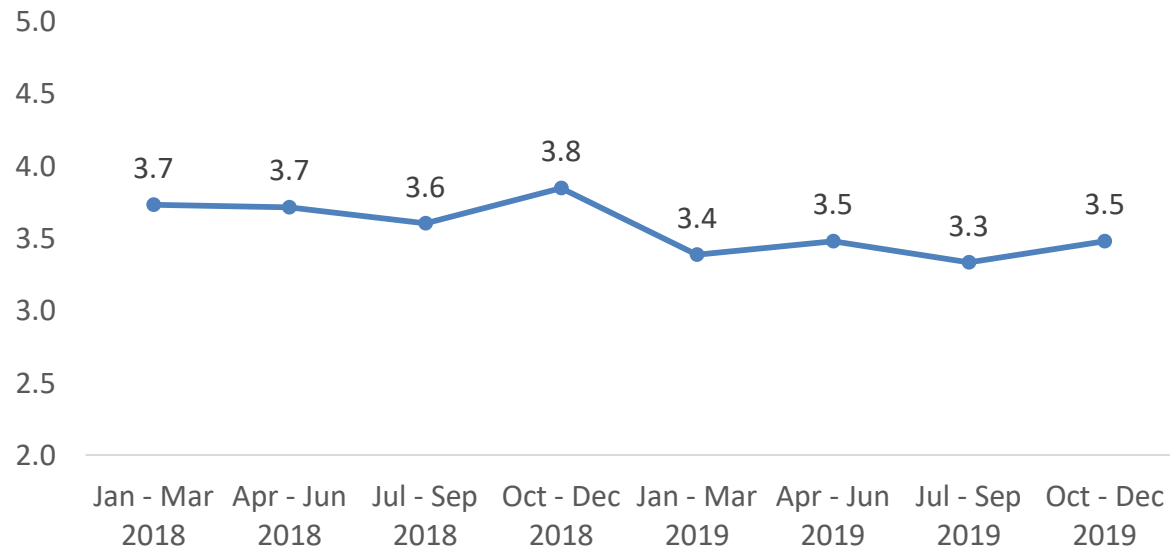


- 2016-17 Restaurants, cafes, bars and evening entertainment
- 2018-19 Restaurants, cafes, and bars
- 2018-19 Evening entertainment

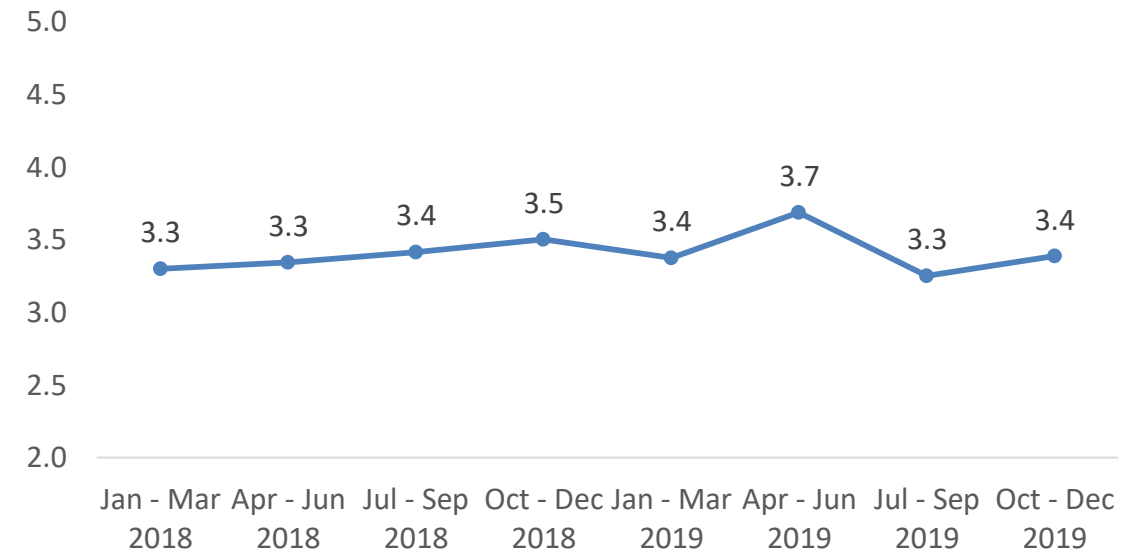
Visitor Satisfaction with elements of the Vanuatu travel experience

Statement Comparison

Ease of undertaking tours and activities while here (2018-19)



Airport arrival / departure experience (2018-19)

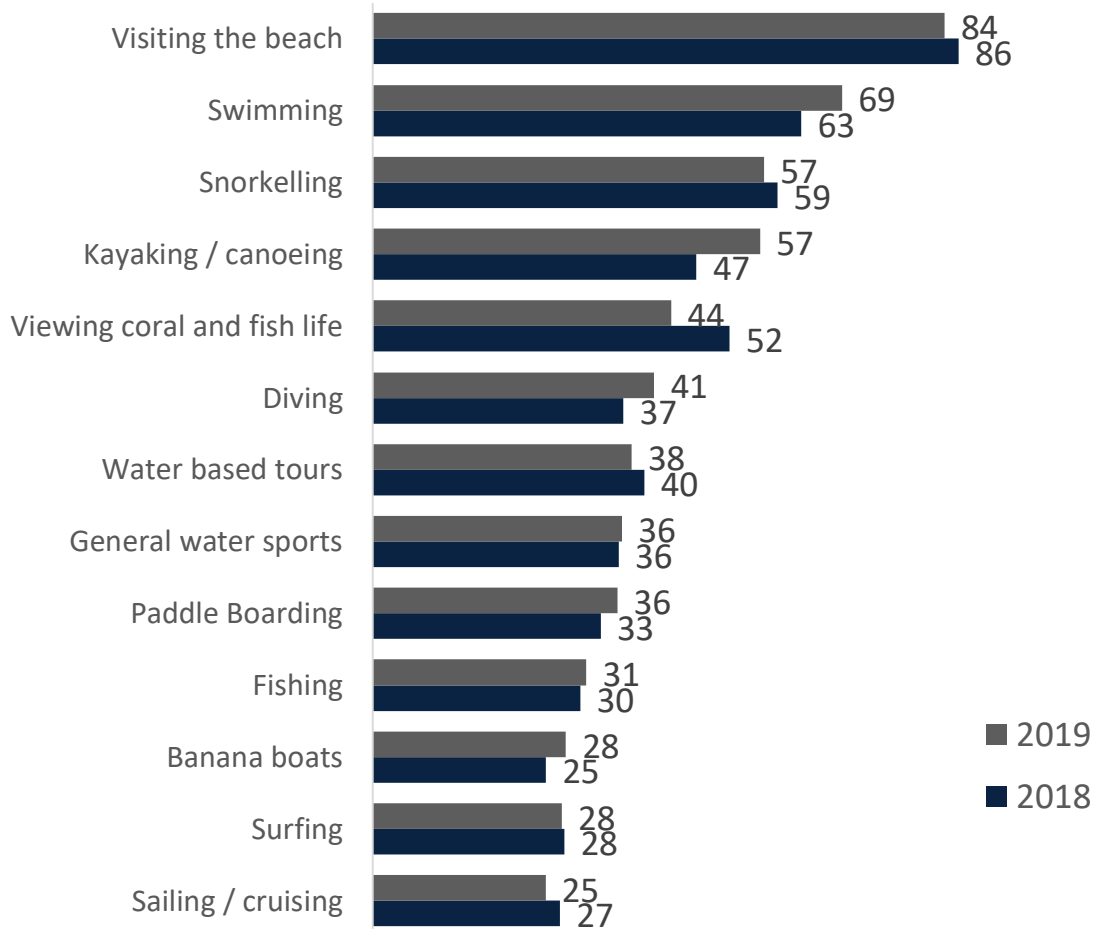




Satisfaction with Activities

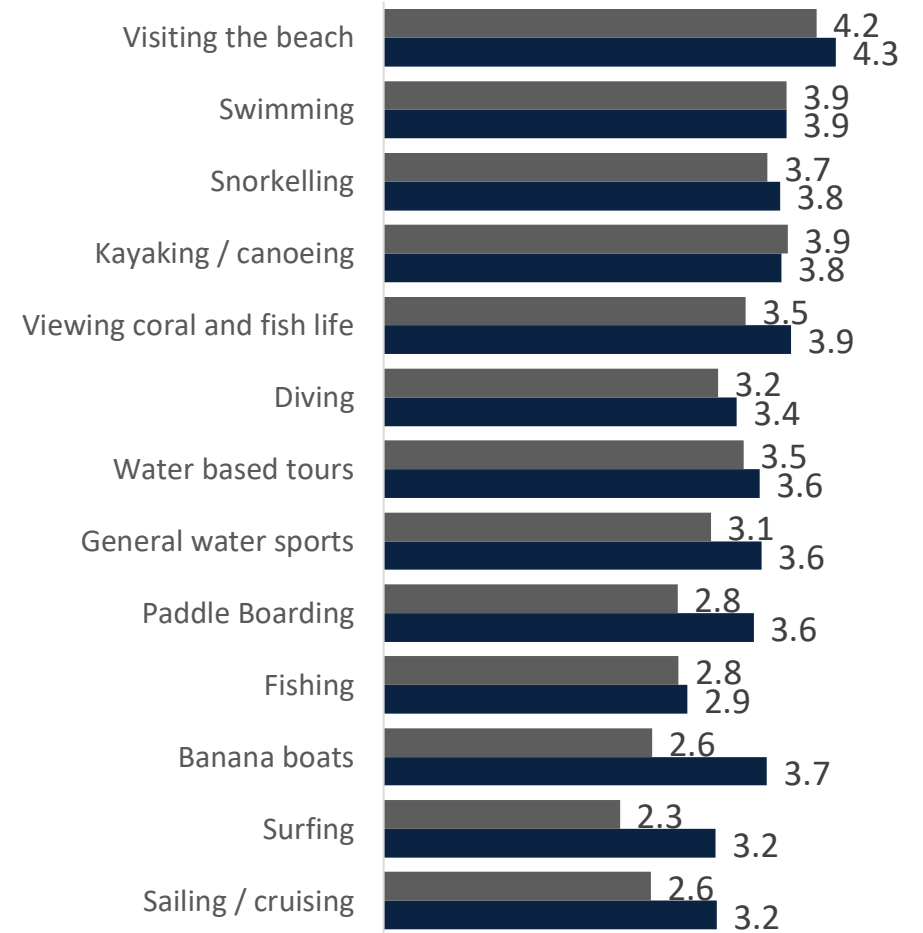
IVS 2018-2019: Water-based activities

Participation Rate



Share of Visitors (%)

Satisfaction

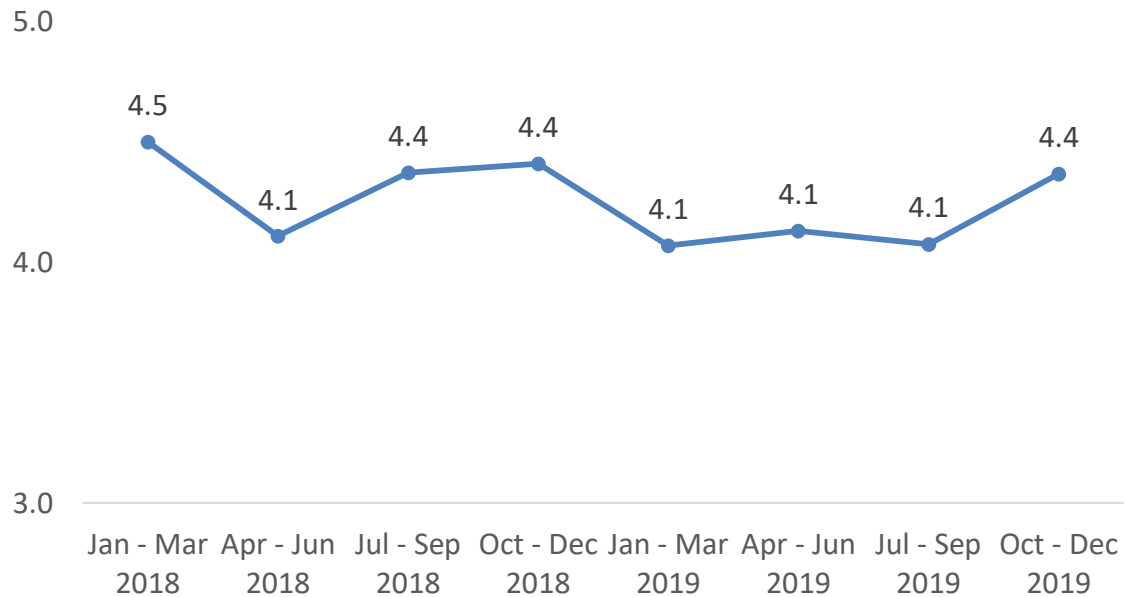


Mean: 1=Very Dissatisfied to 5=Very Satisfied

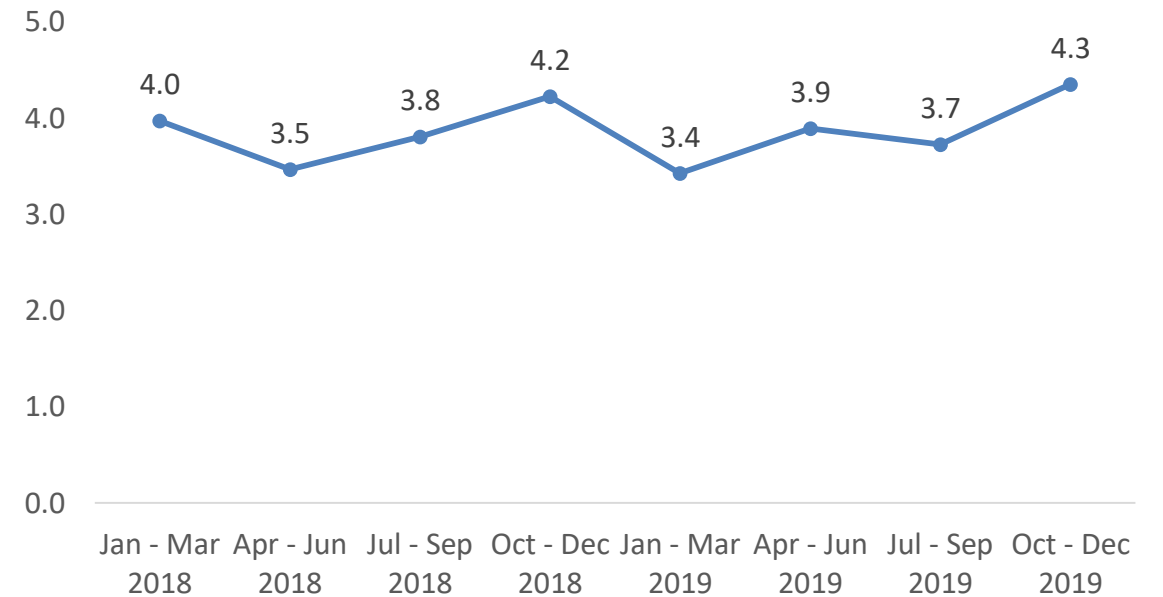
Water based activities: satisfaction

Activities Quarterly Comparison

Visiting the beach

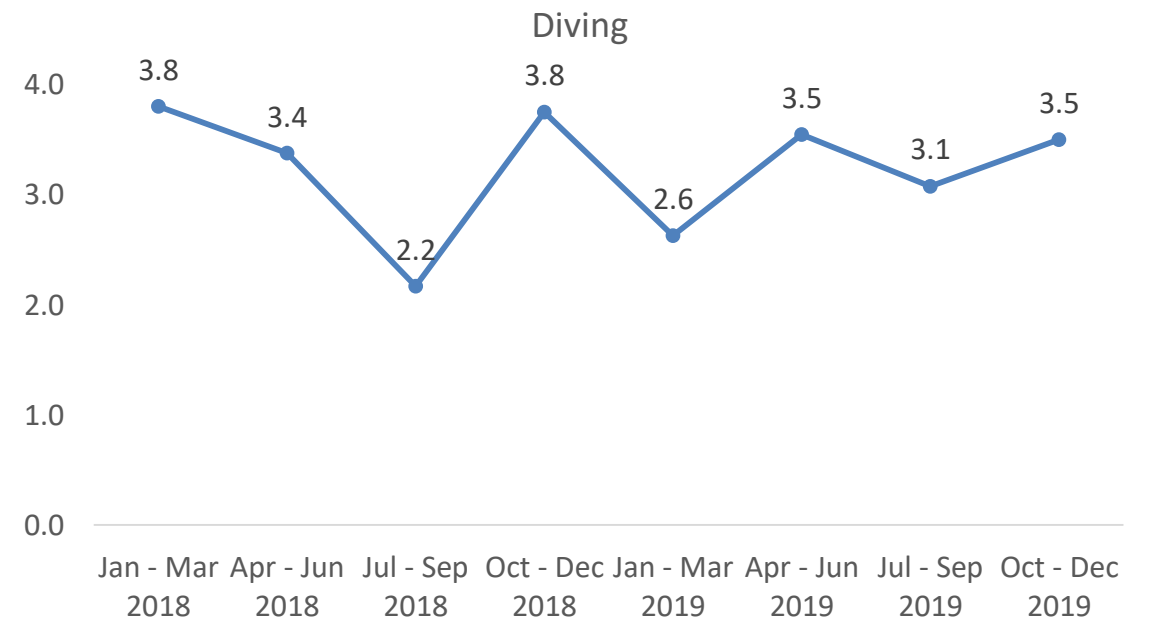
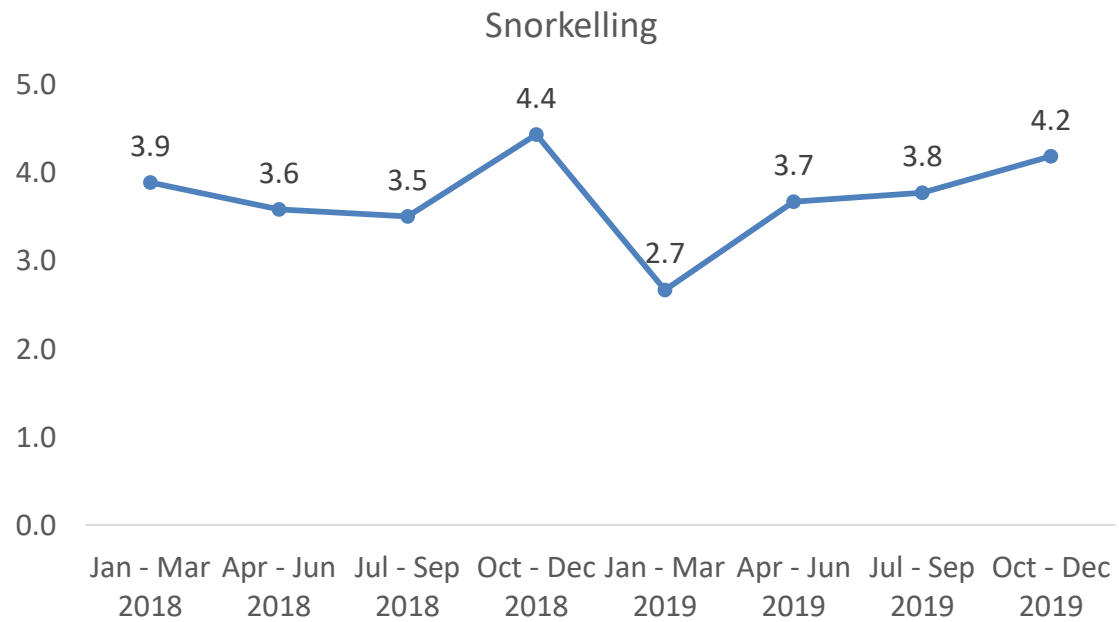


Swimming



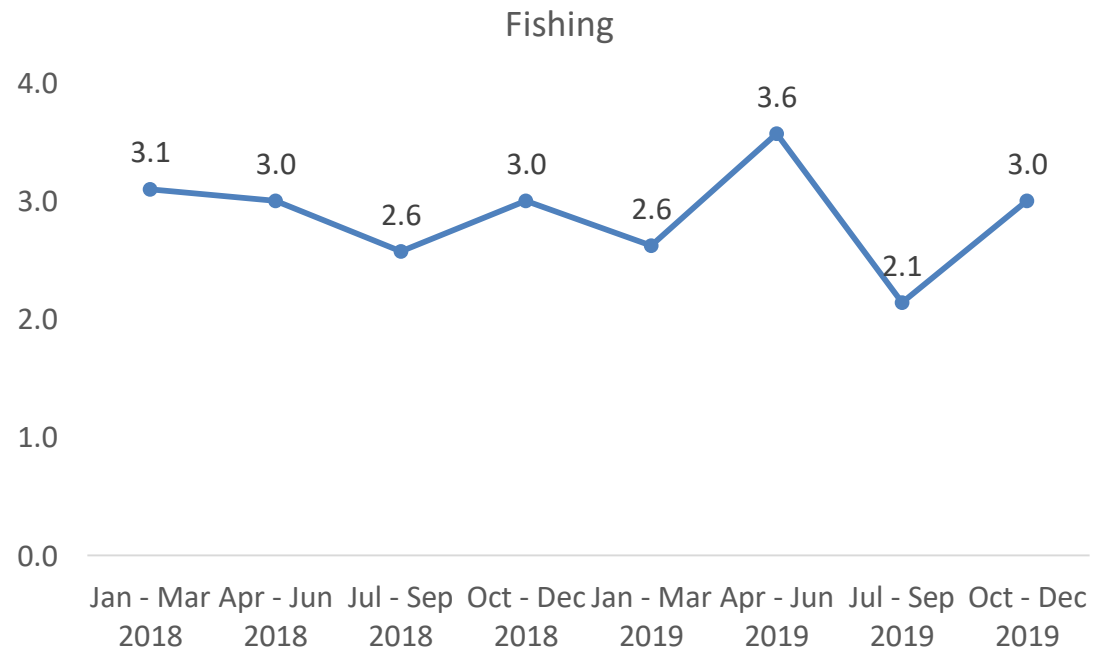
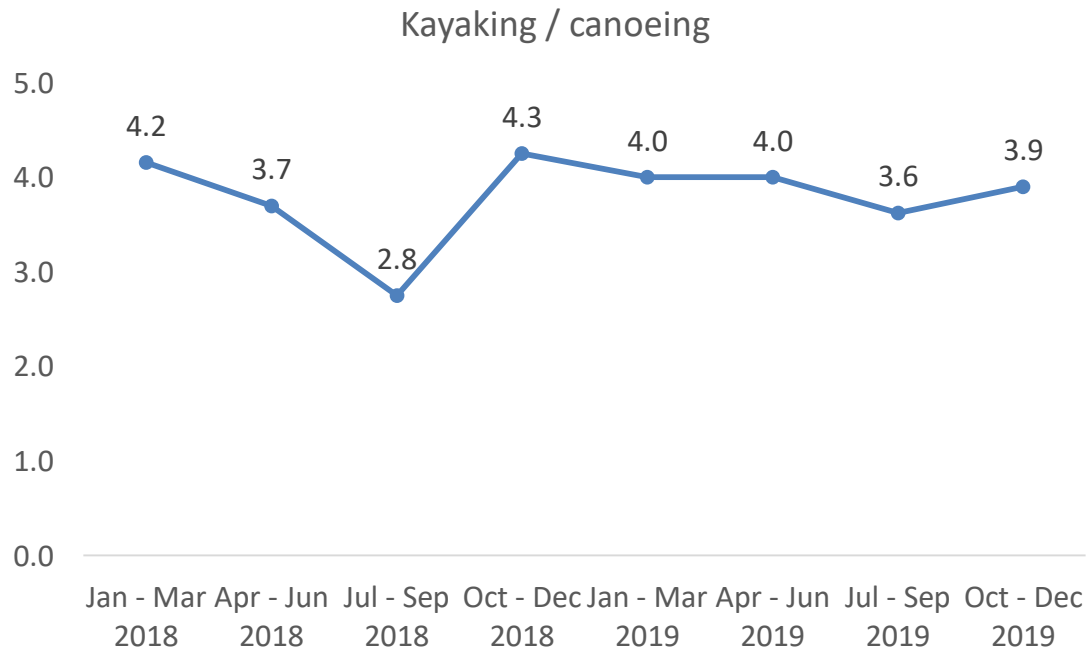
Water based activities: satisfaction

Activities Quarterly Comparison



Water based activities: satisfaction

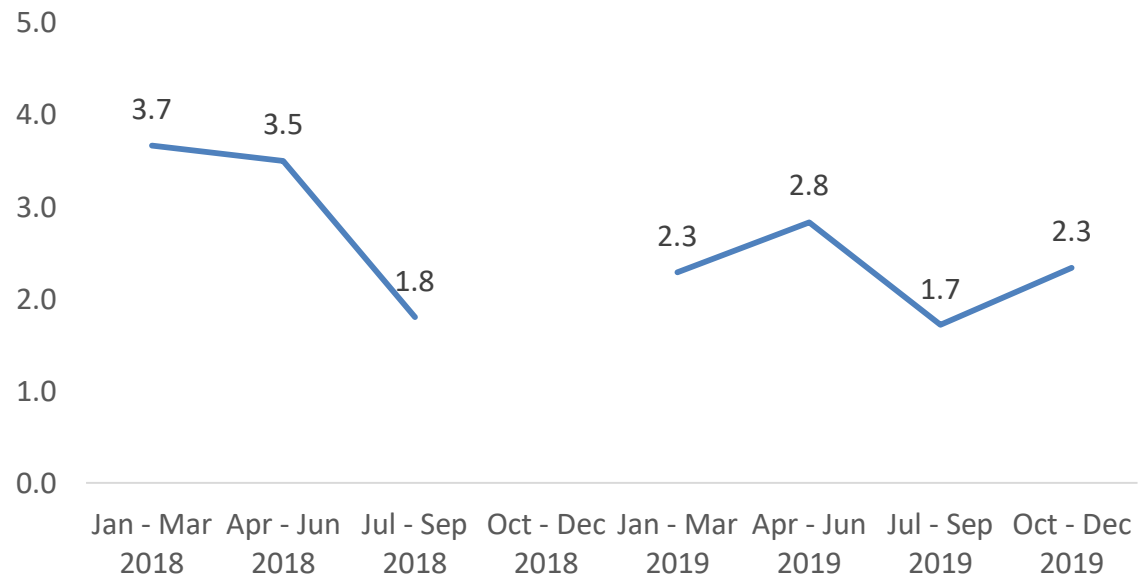
Activities Quarterly Comparison



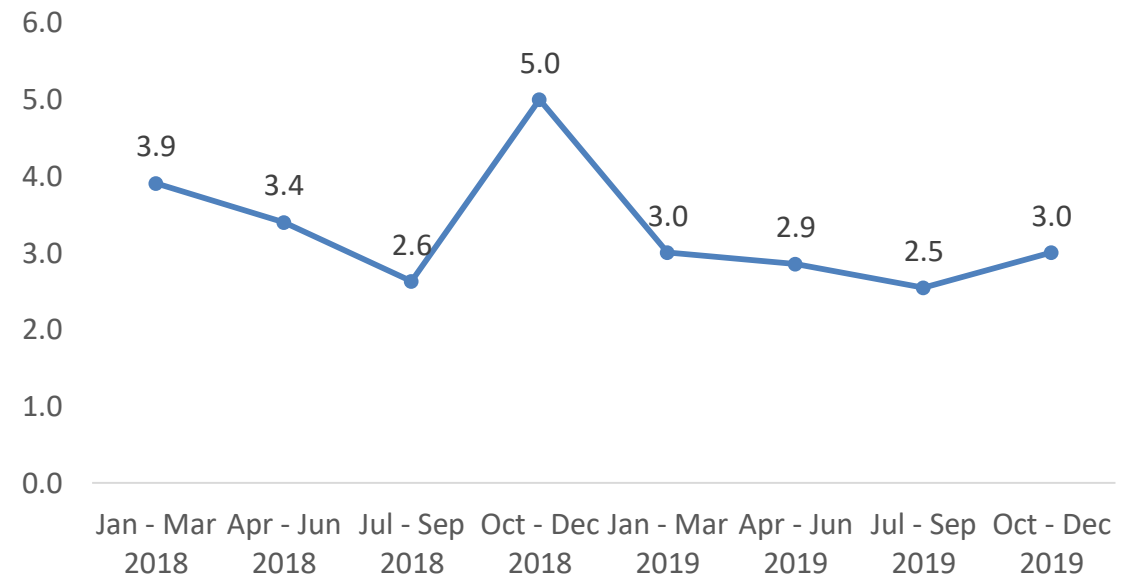
Water based activities: satisfaction

Activities Quarterly Comparison

Surfing

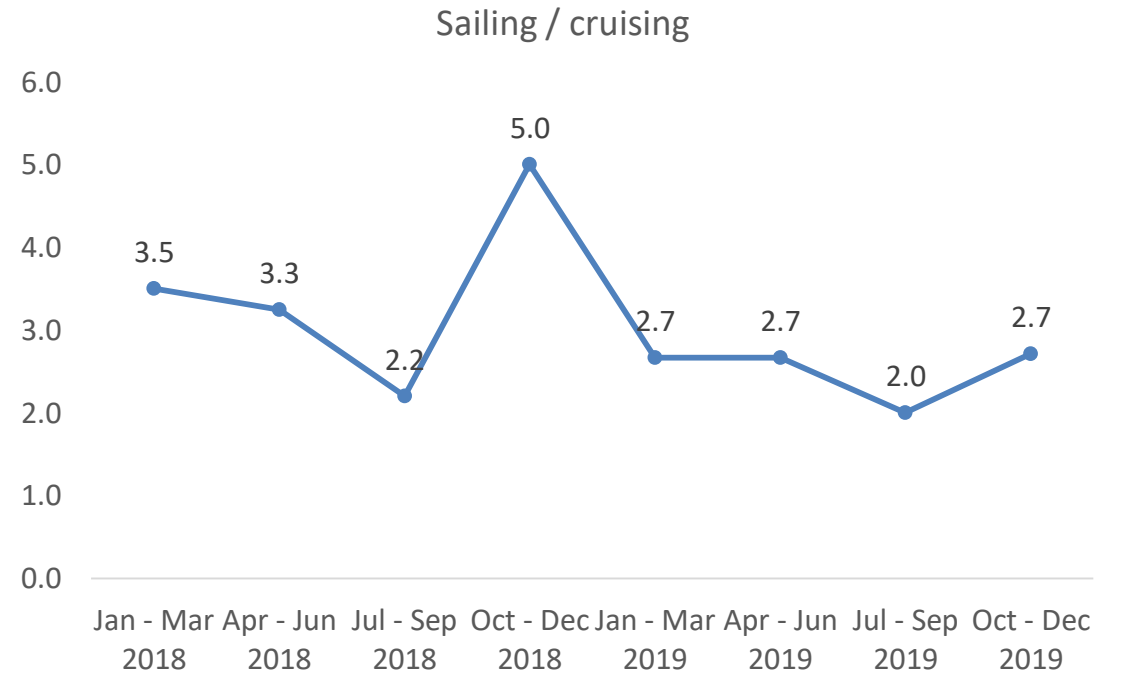
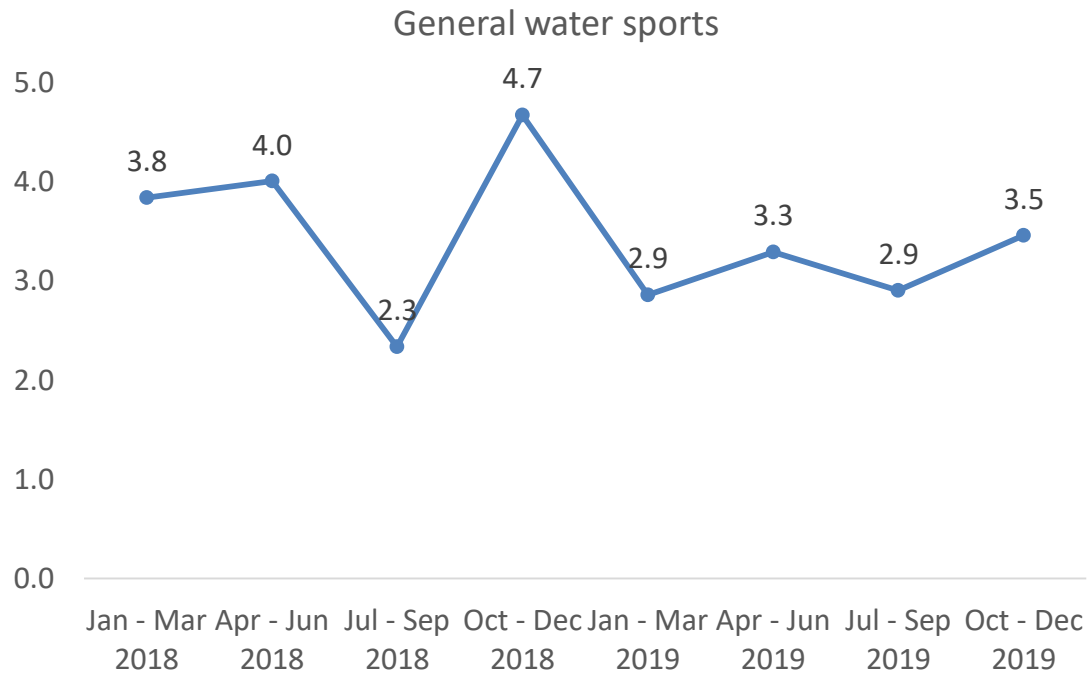


Paddle Boarding



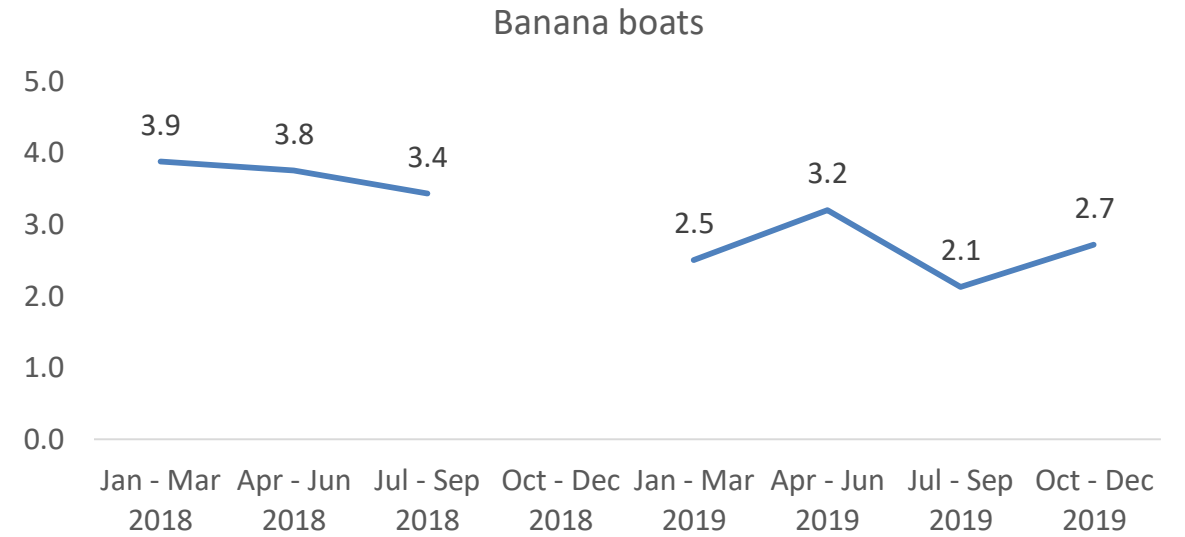
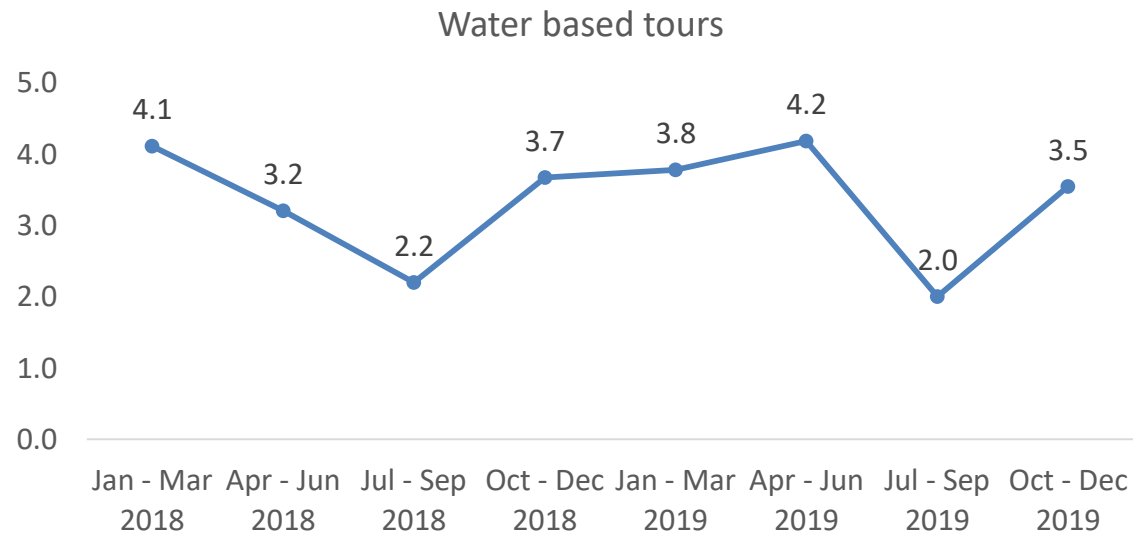
Water based activities: satisfaction

Activities Quarterly Comparison



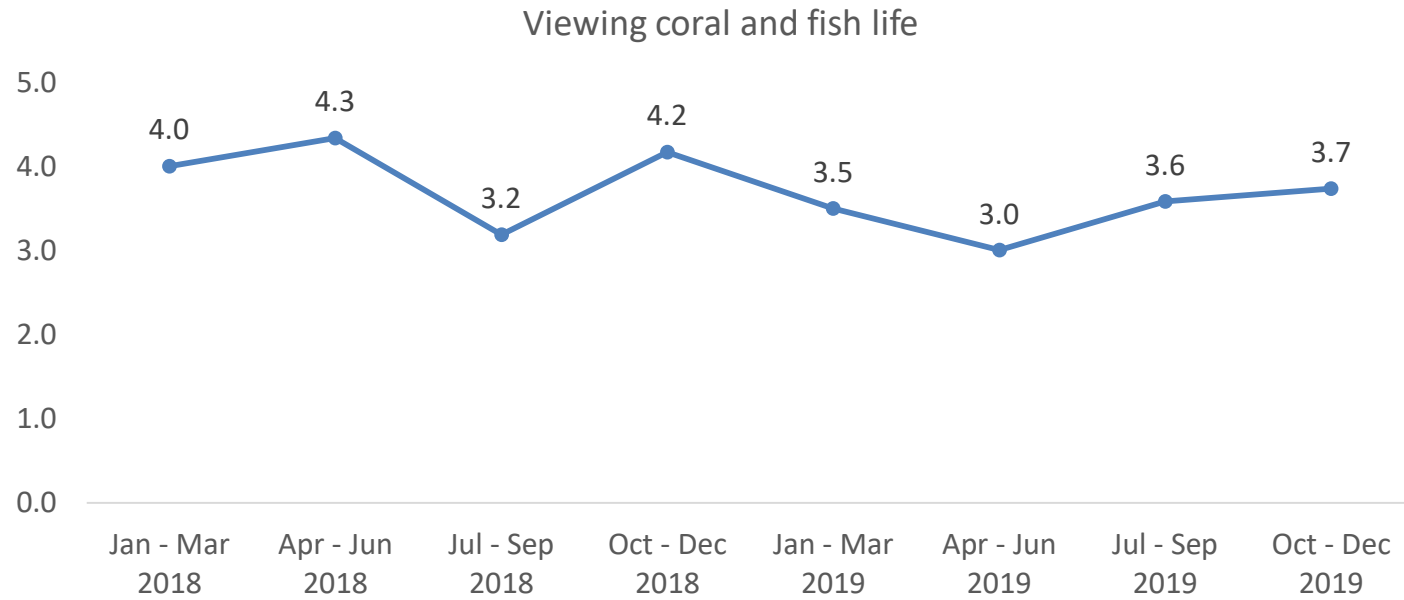
Water based activities: satisfaction

Activities Quarterly Comparison



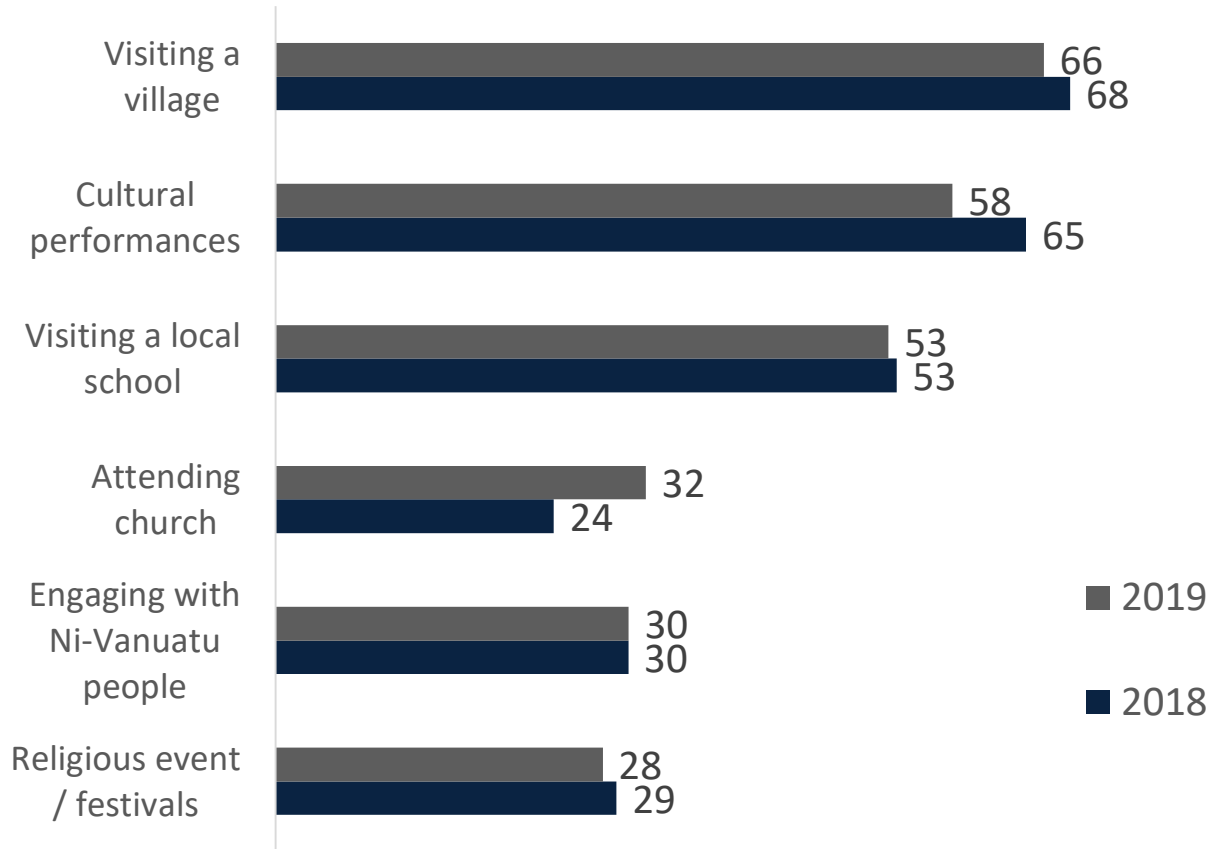
Water based activities: satisfaction

Activities Quarterly Comparison



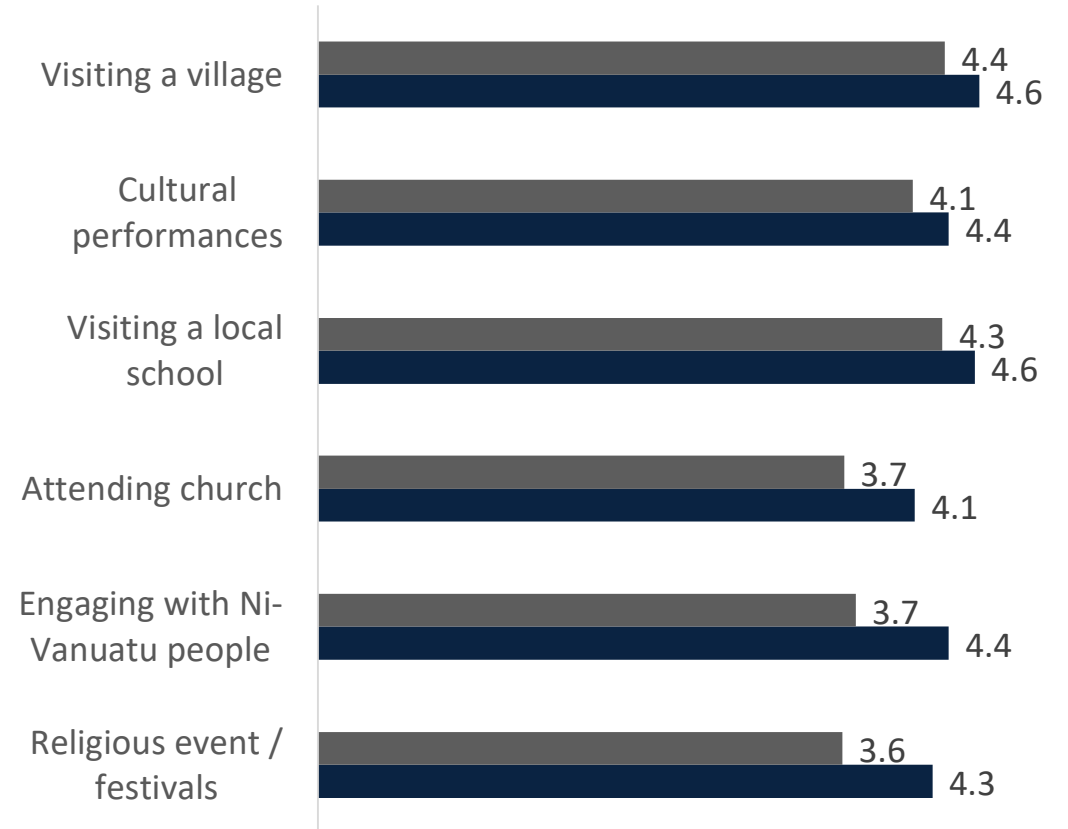
IVS 2018-2019: Cultural interaction

Participation Rate



Share of Visitors (%)

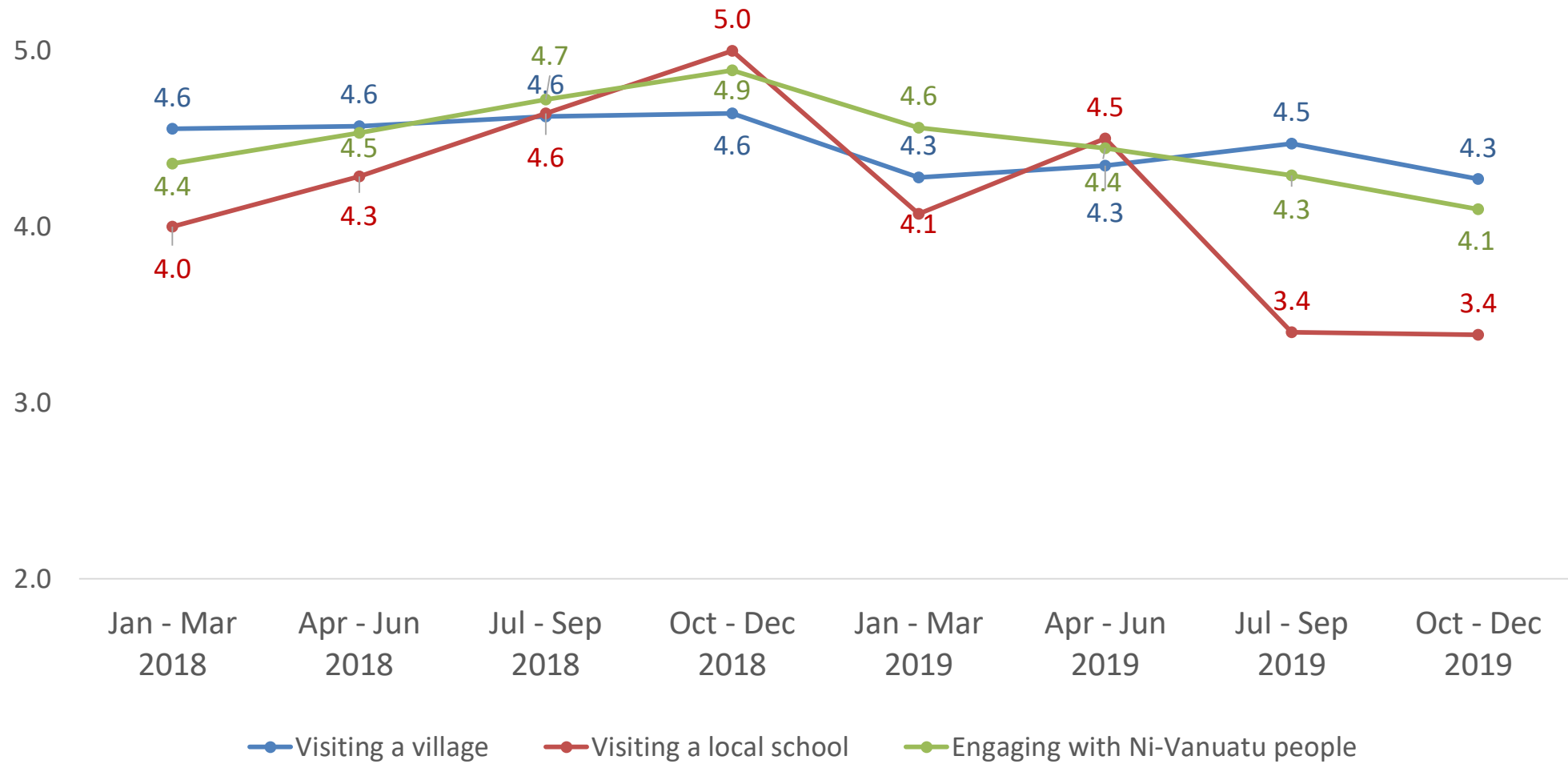
Satisfaction



Mean: 1=Very Dissatisfied to 5=Very Satisfied

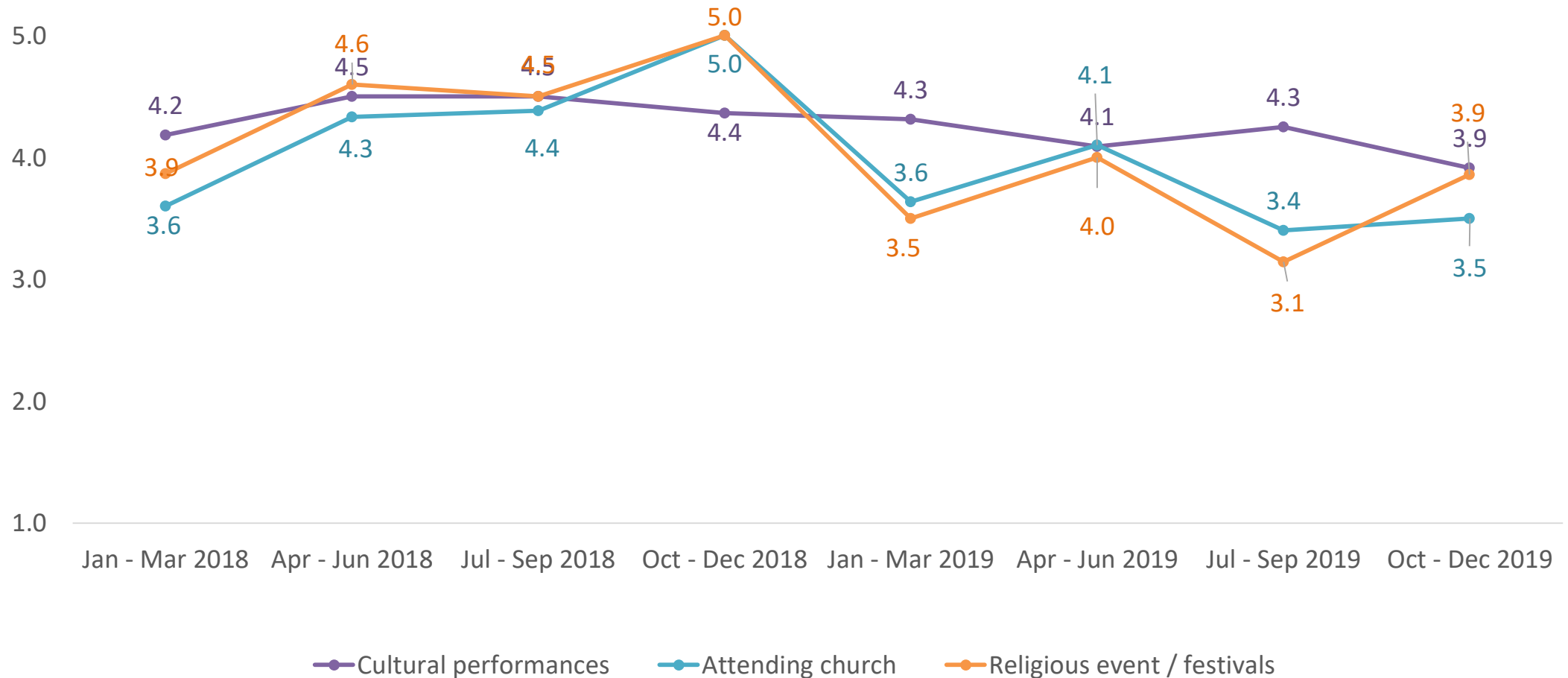
Cultural interaction: satisfaction

Activities Quarterly Comparison



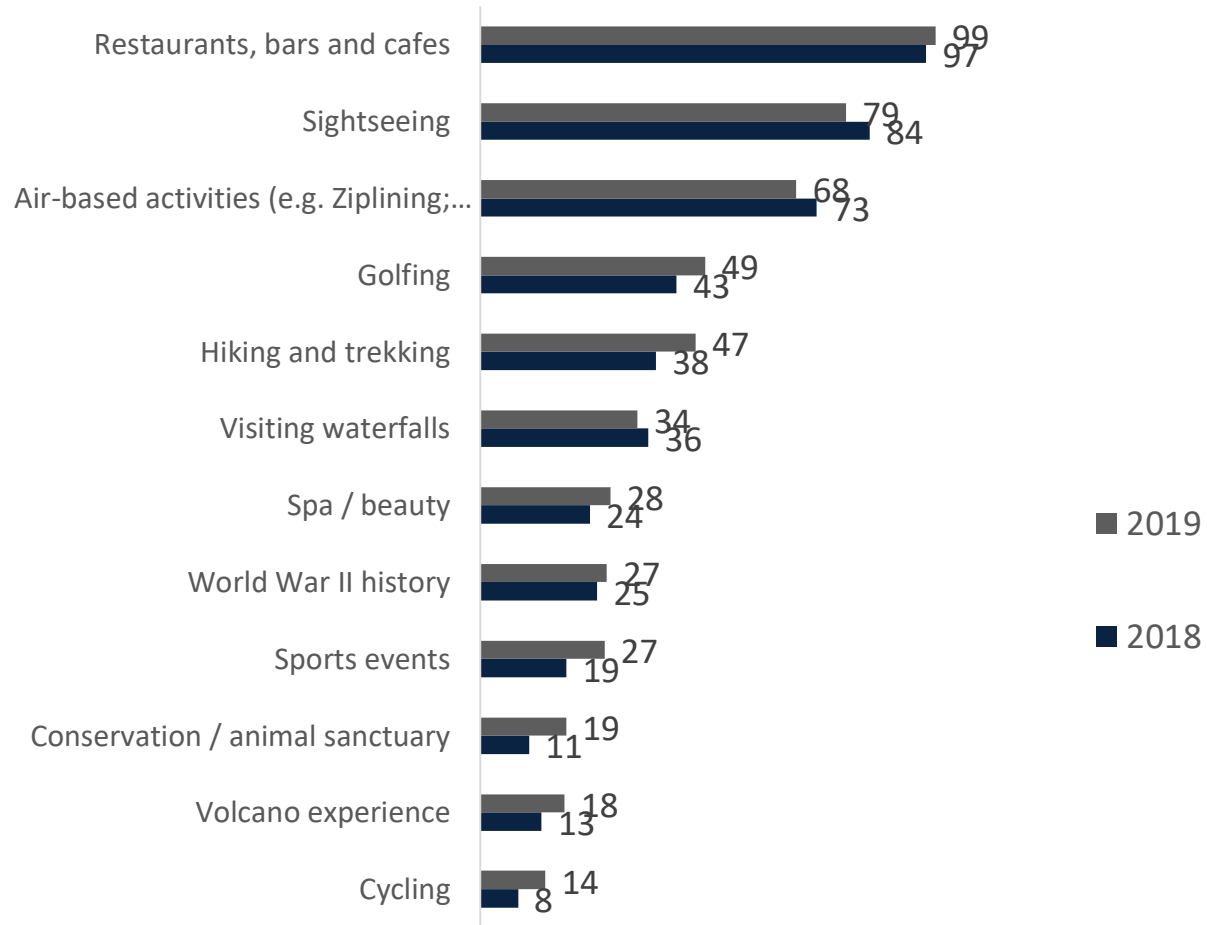
Cultural interaction: satisfaction

Activities Quarterly Comparison



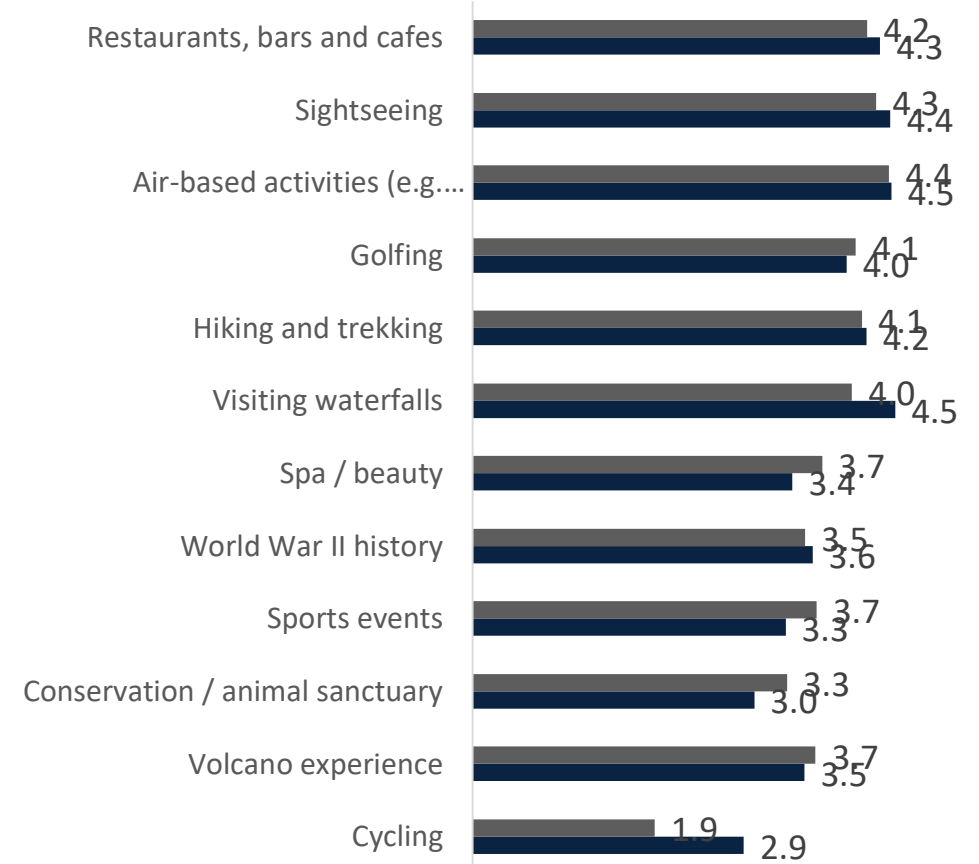
IVS 2018-2019: Land-based activities

Participation Rate



Share of Visitors (%)

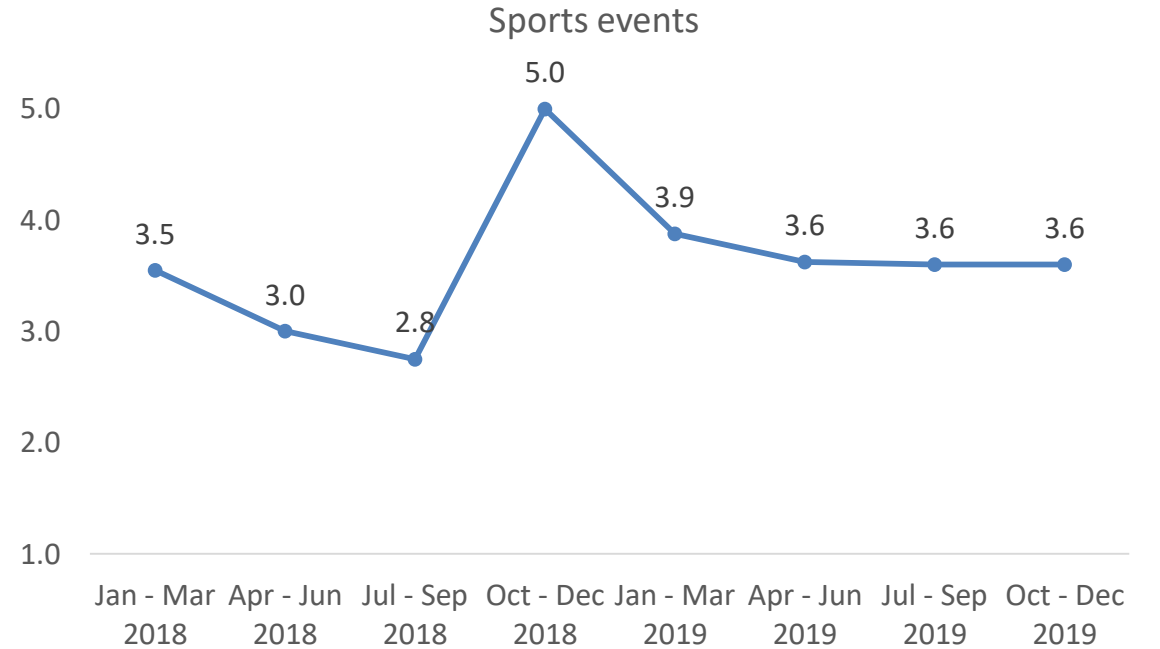
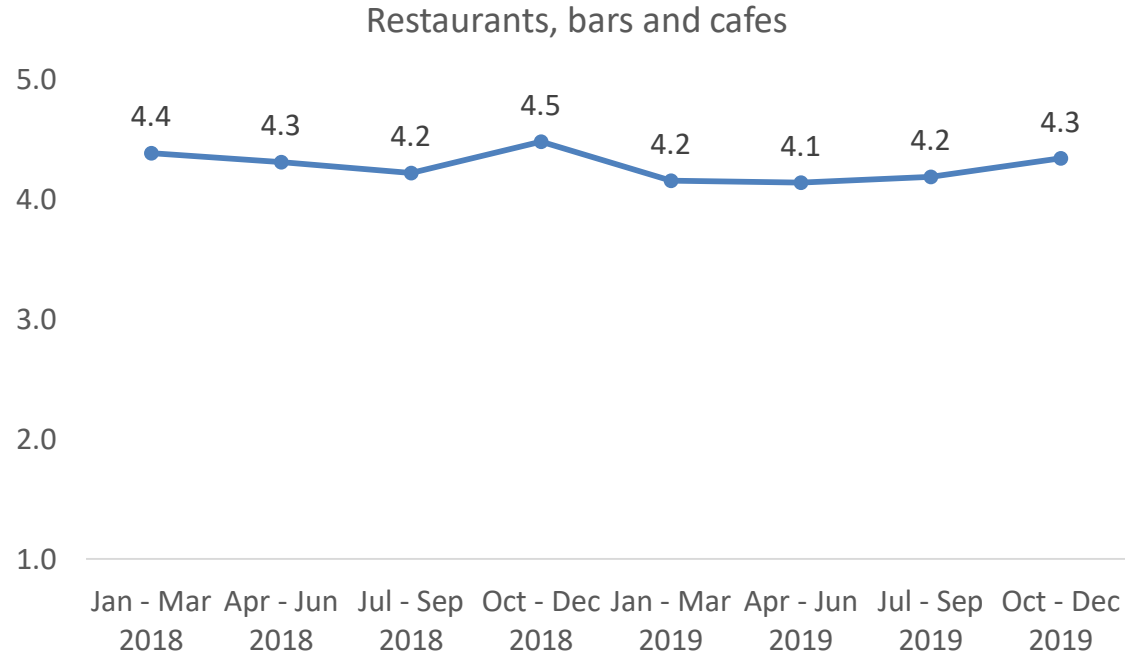
Satisfaction



Mean: 1=Very Dissatisfied to 5=Very Satisfied

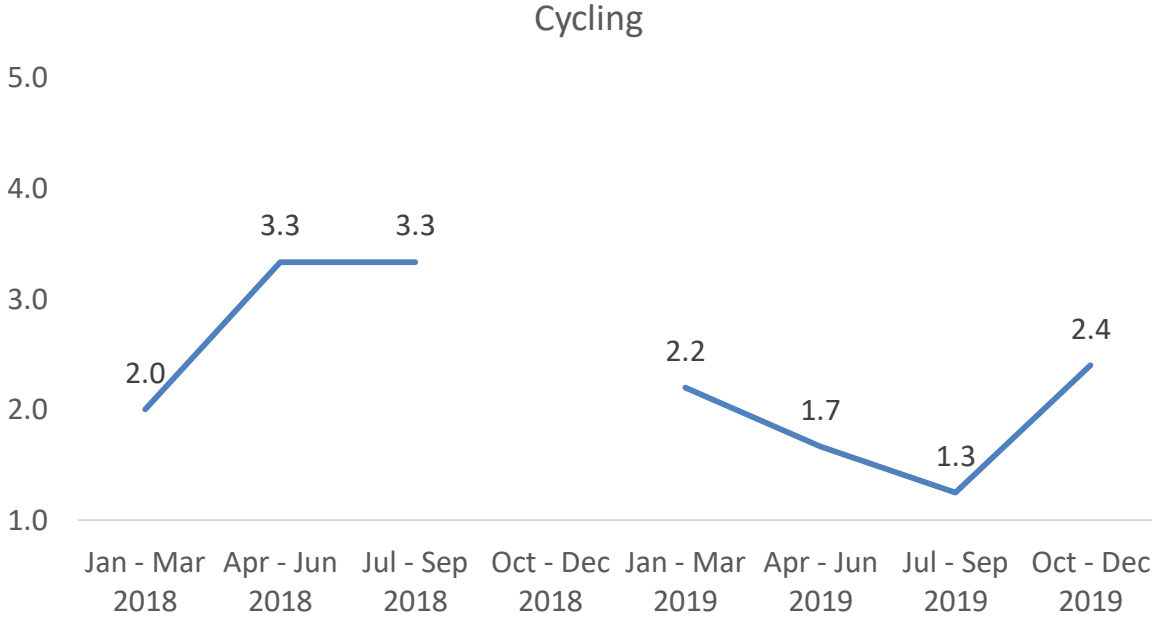
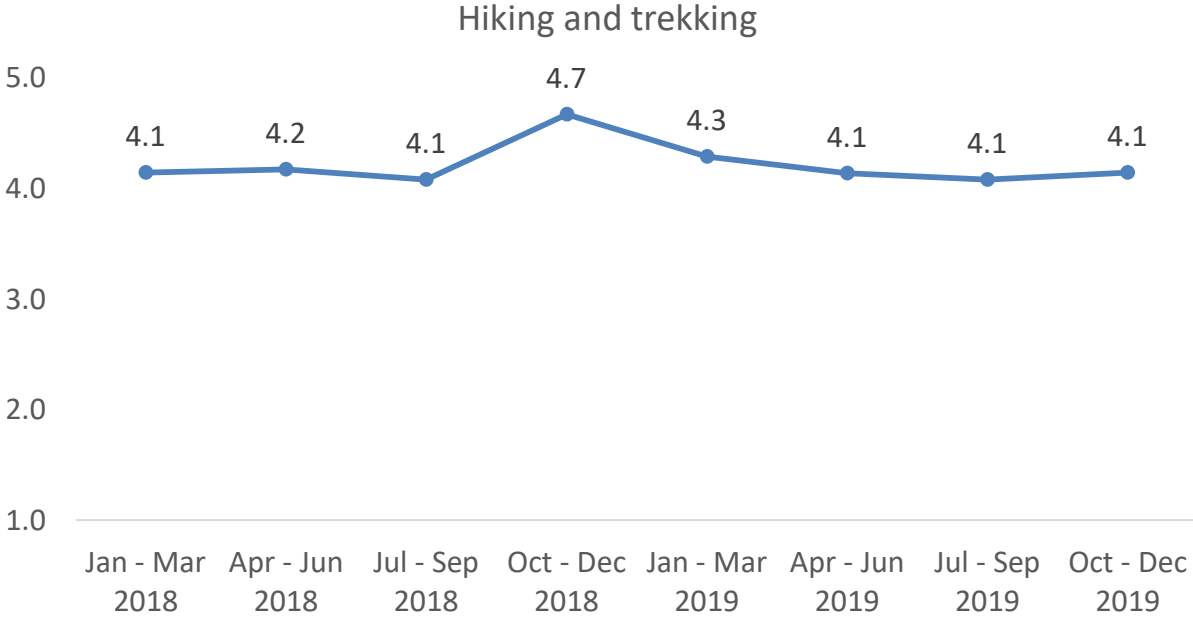
Land based activities and touring: satisfaction

Activities Quarterly Comparison



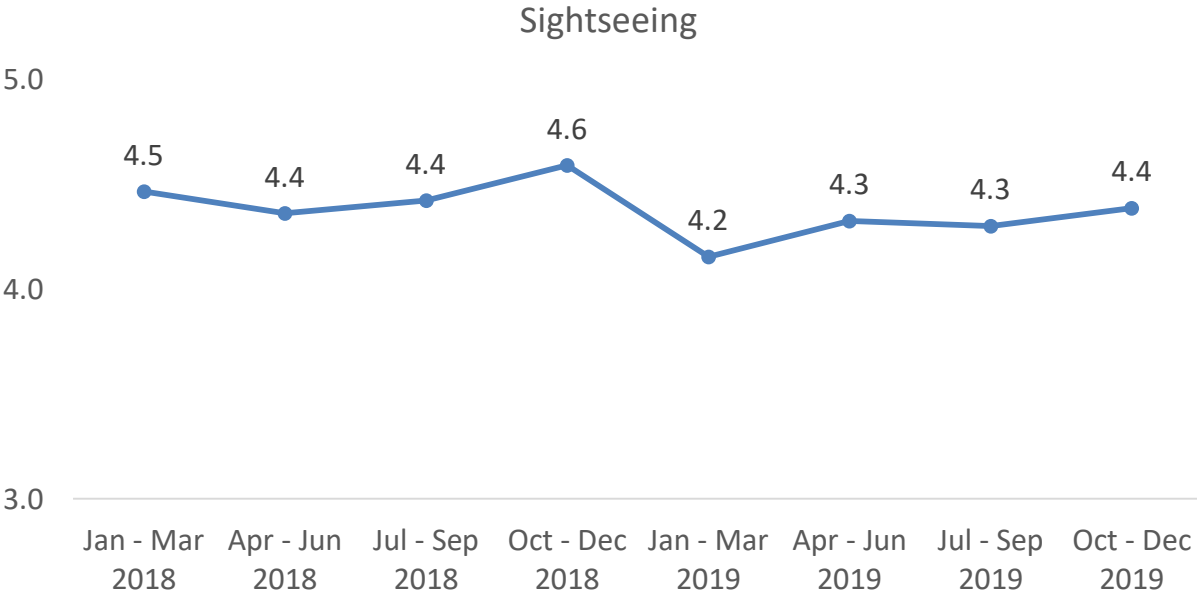
Land based activities and touring: satisfaction

Activities Quarterly Comparison



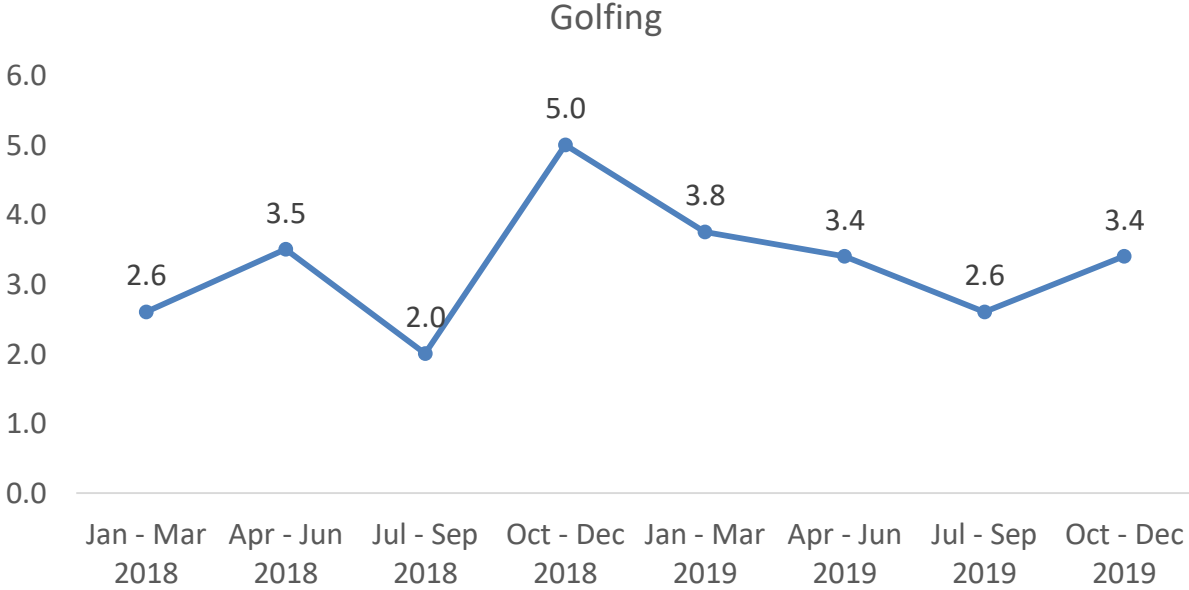
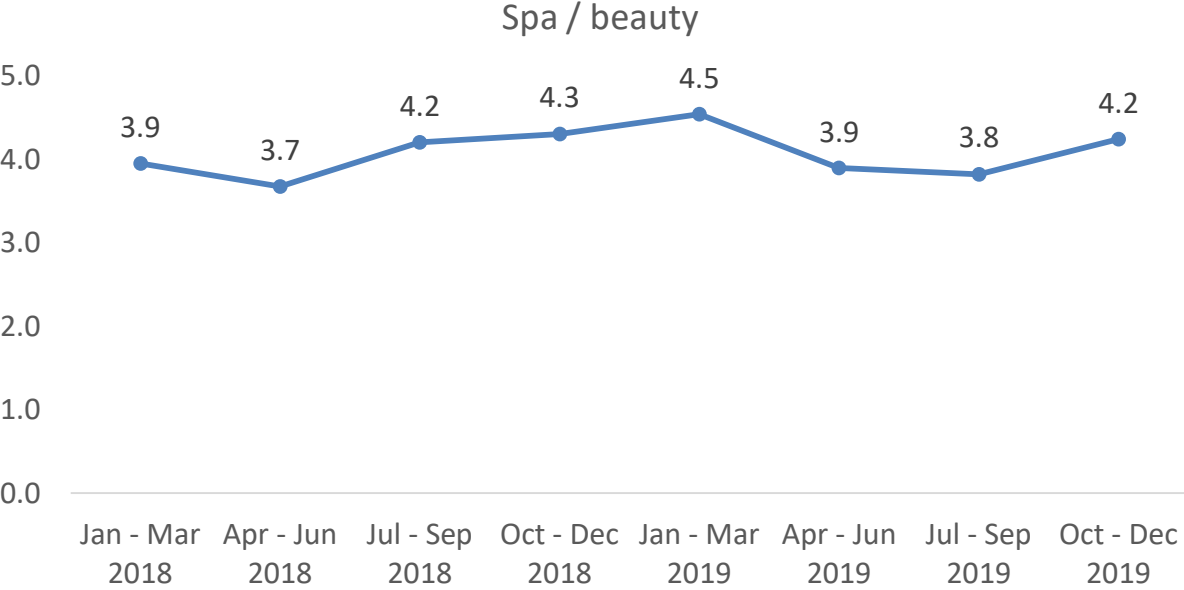
Land based activities and touring: satisfaction

Activities Quarterly Comparison



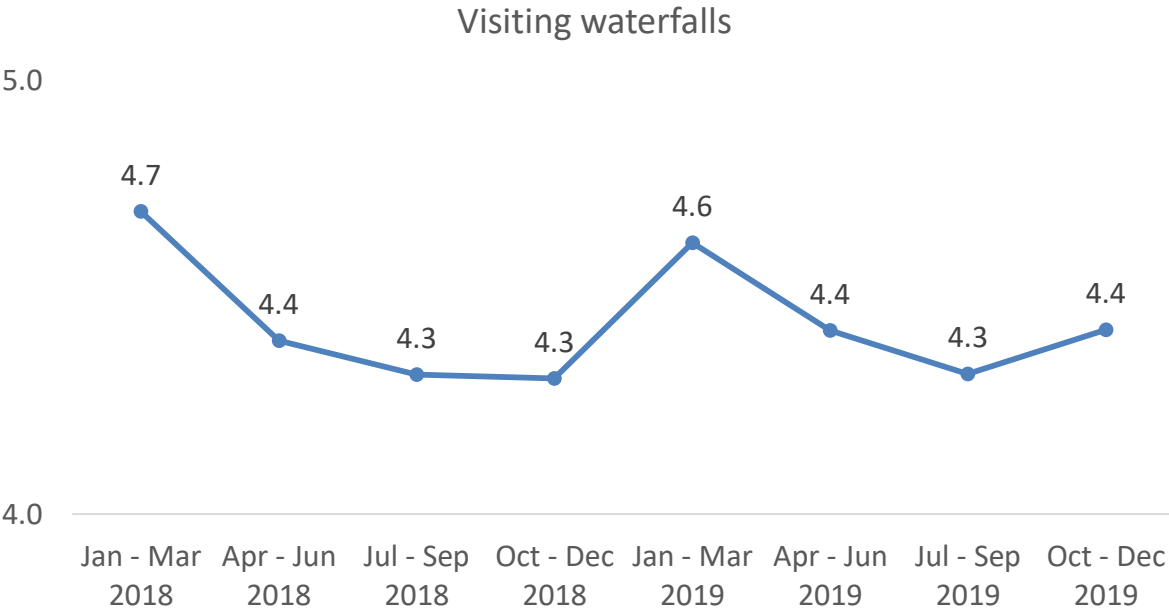
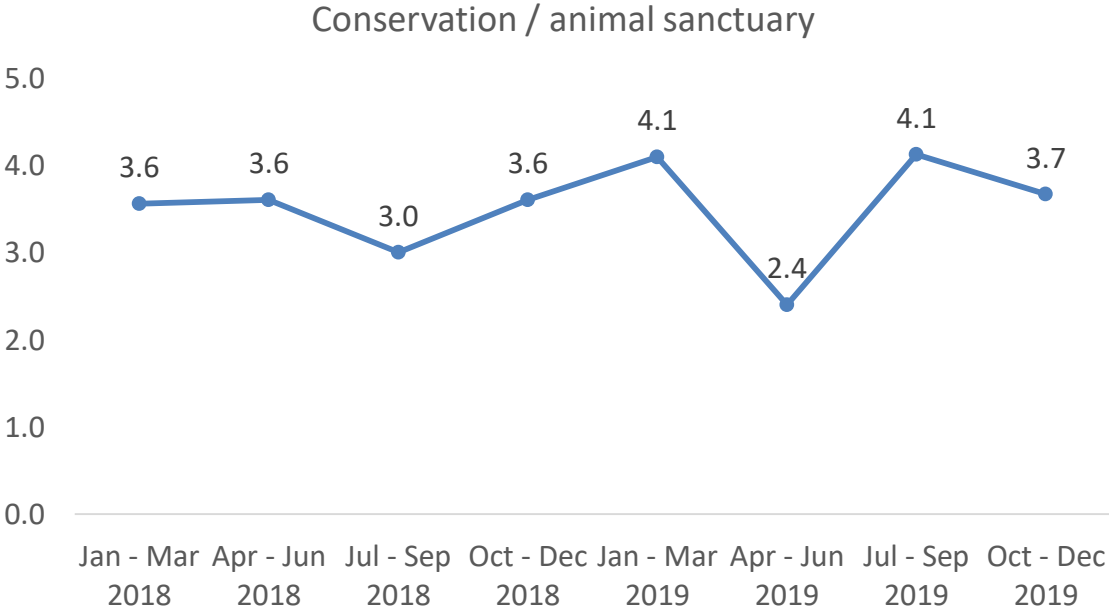
Land based activities and touring: satisfaction

Activities Quarterly Comparison



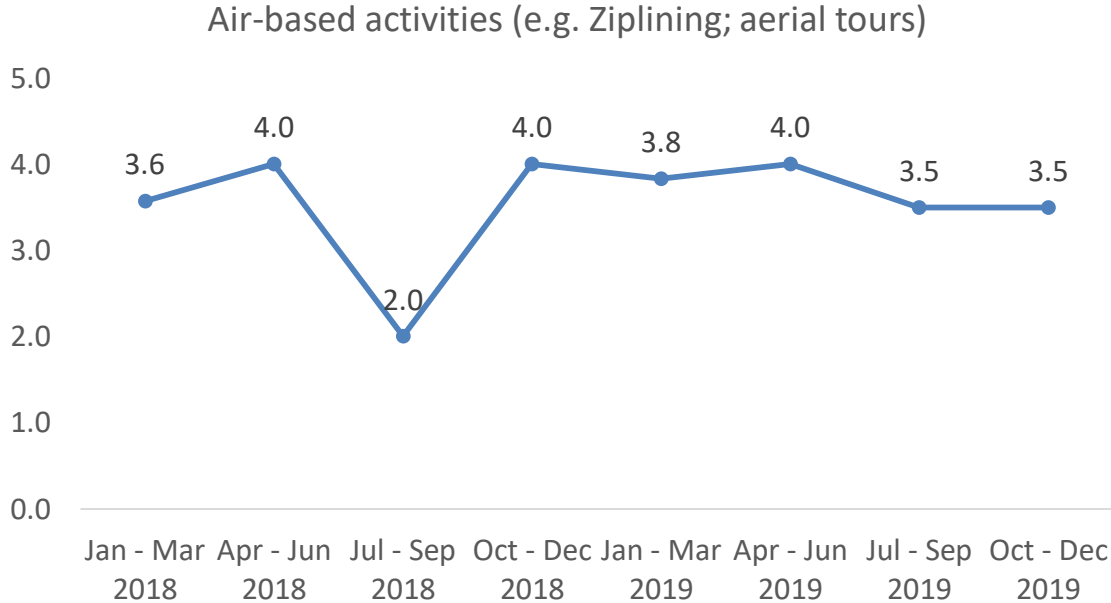
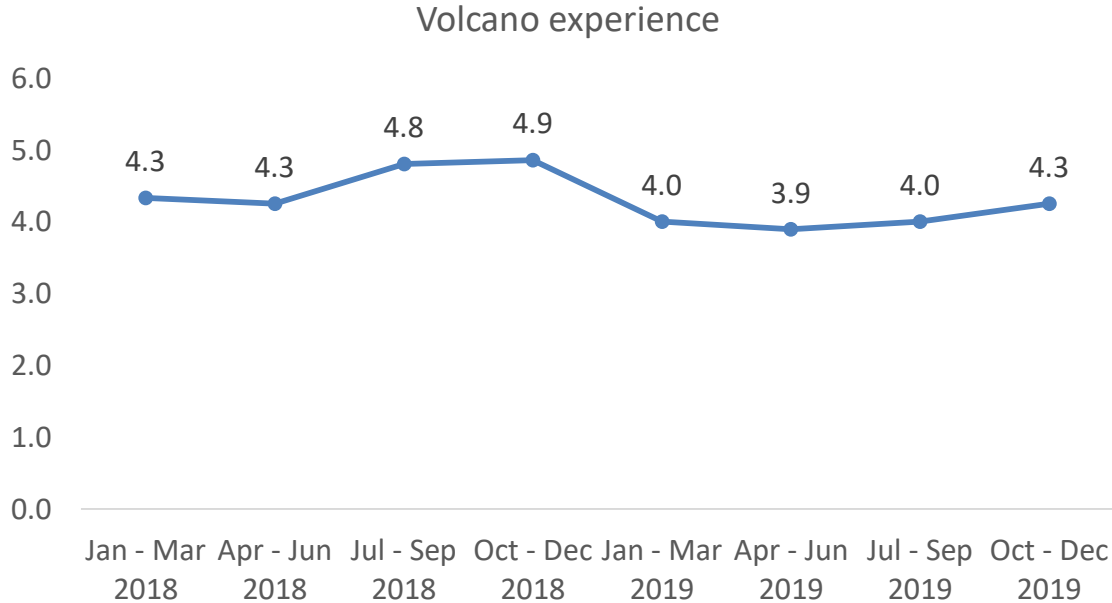
Land based activities and touring: satisfaction

Activities Quarterly Comparison



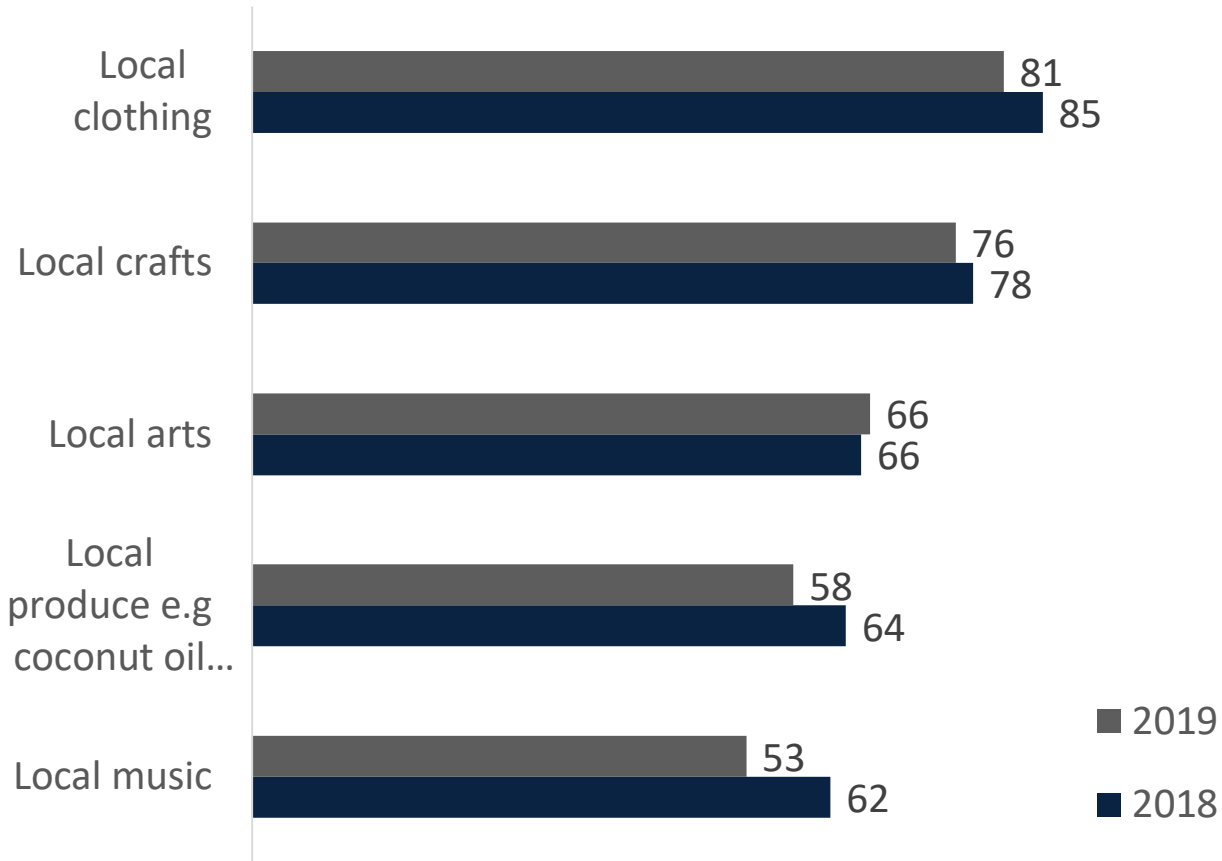
Land based activities and touring: satisfaction

Activities Quarterly Comparison



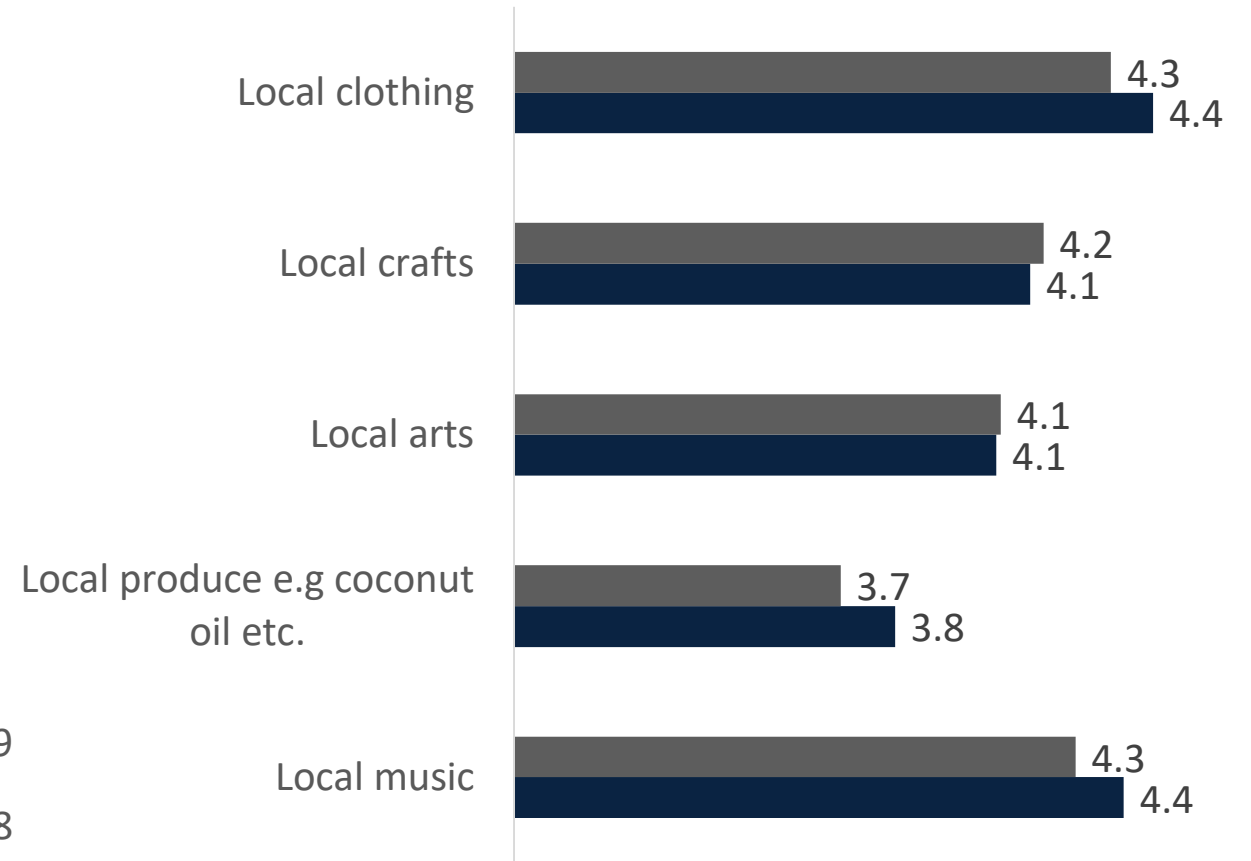
IVS 2018-2019: Shopping

Participation Rate



Share of Visitors (%)

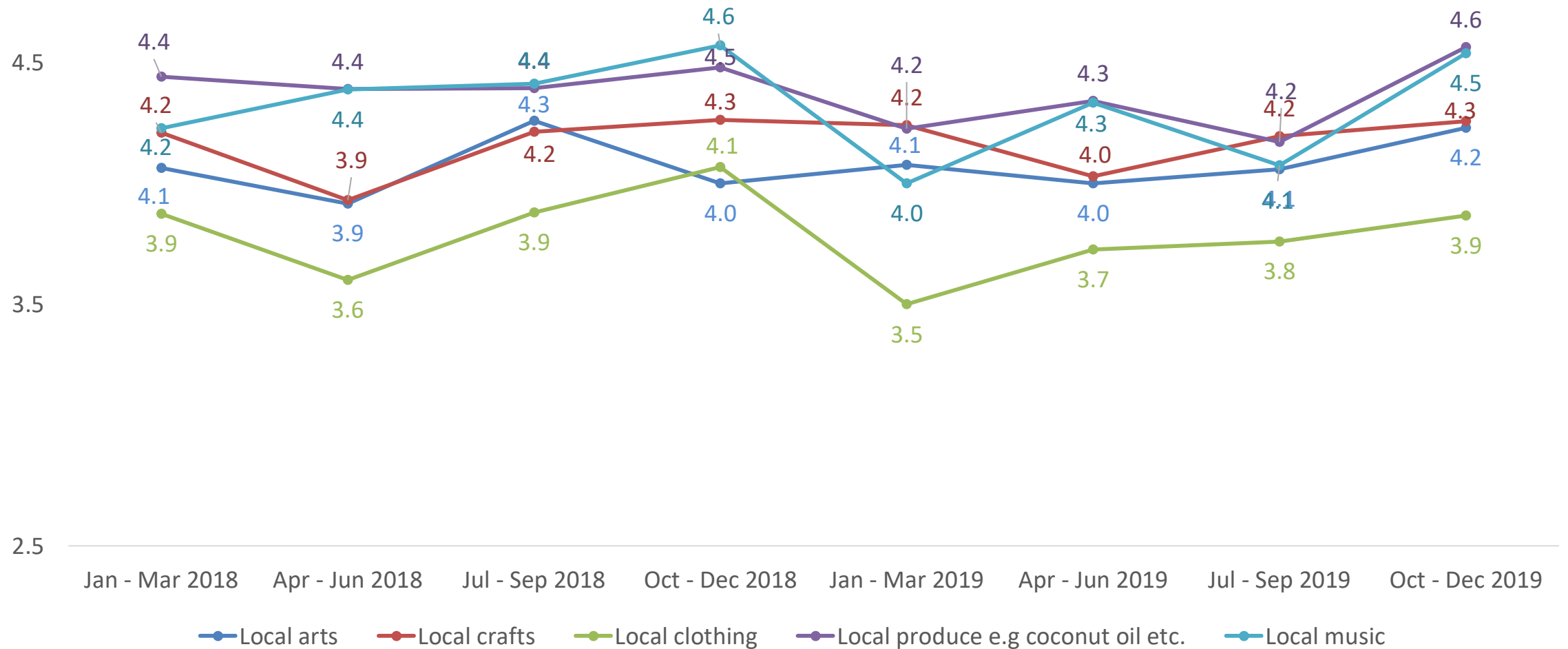
Satisfaction



Mean: 1=Very Dissatisfied to 5=Very Satisfied

Shopping: satisfaction

Activities Quarterly Comparison

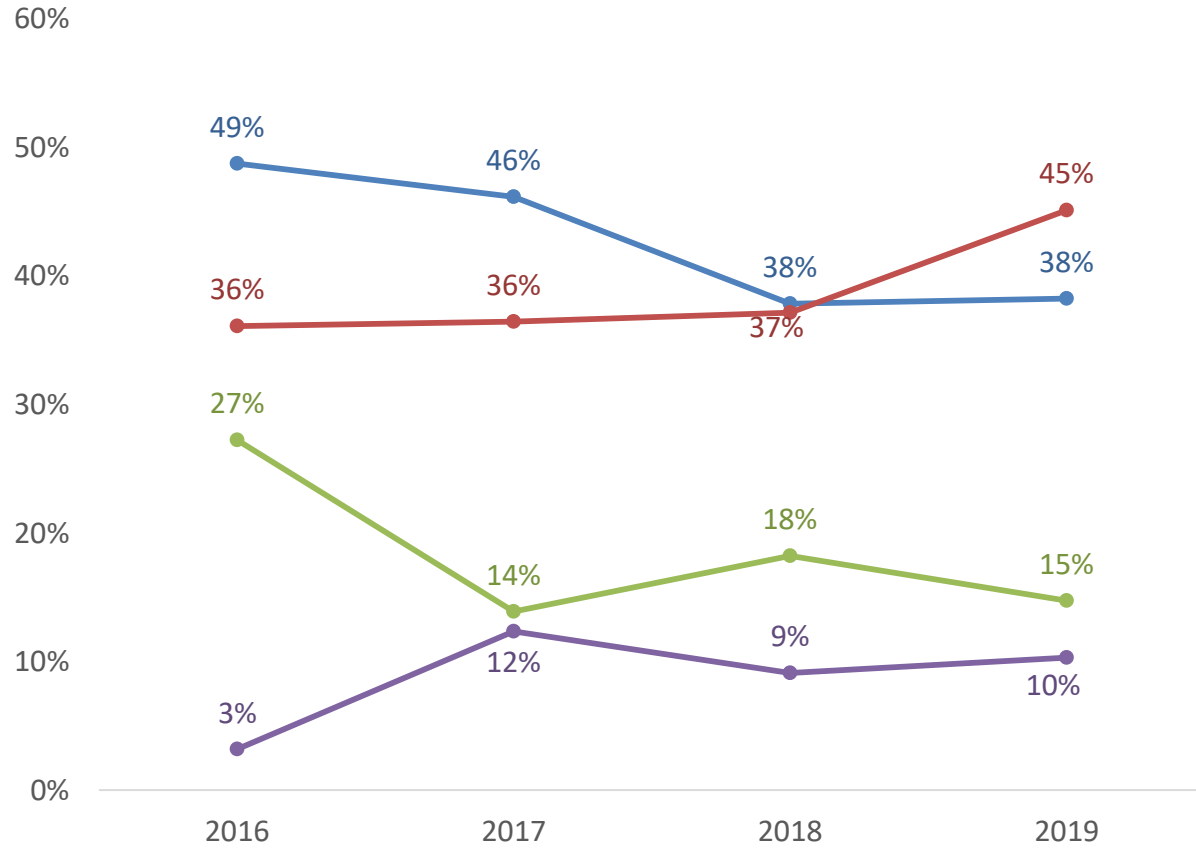




Most & Least Appealing Factors & Improvement

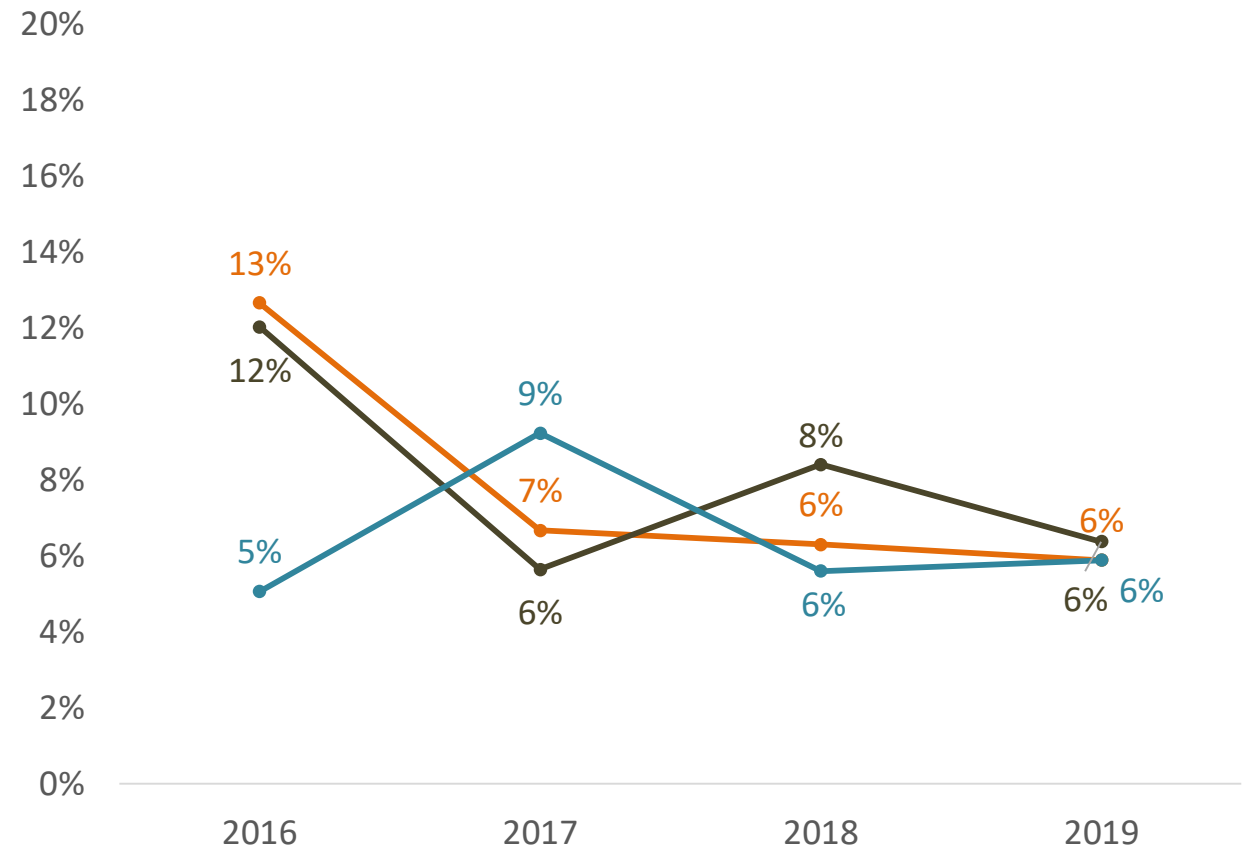
Most Appealing Aspects of visit to Vanuatu (% of comments)

Most Appealing #1-4



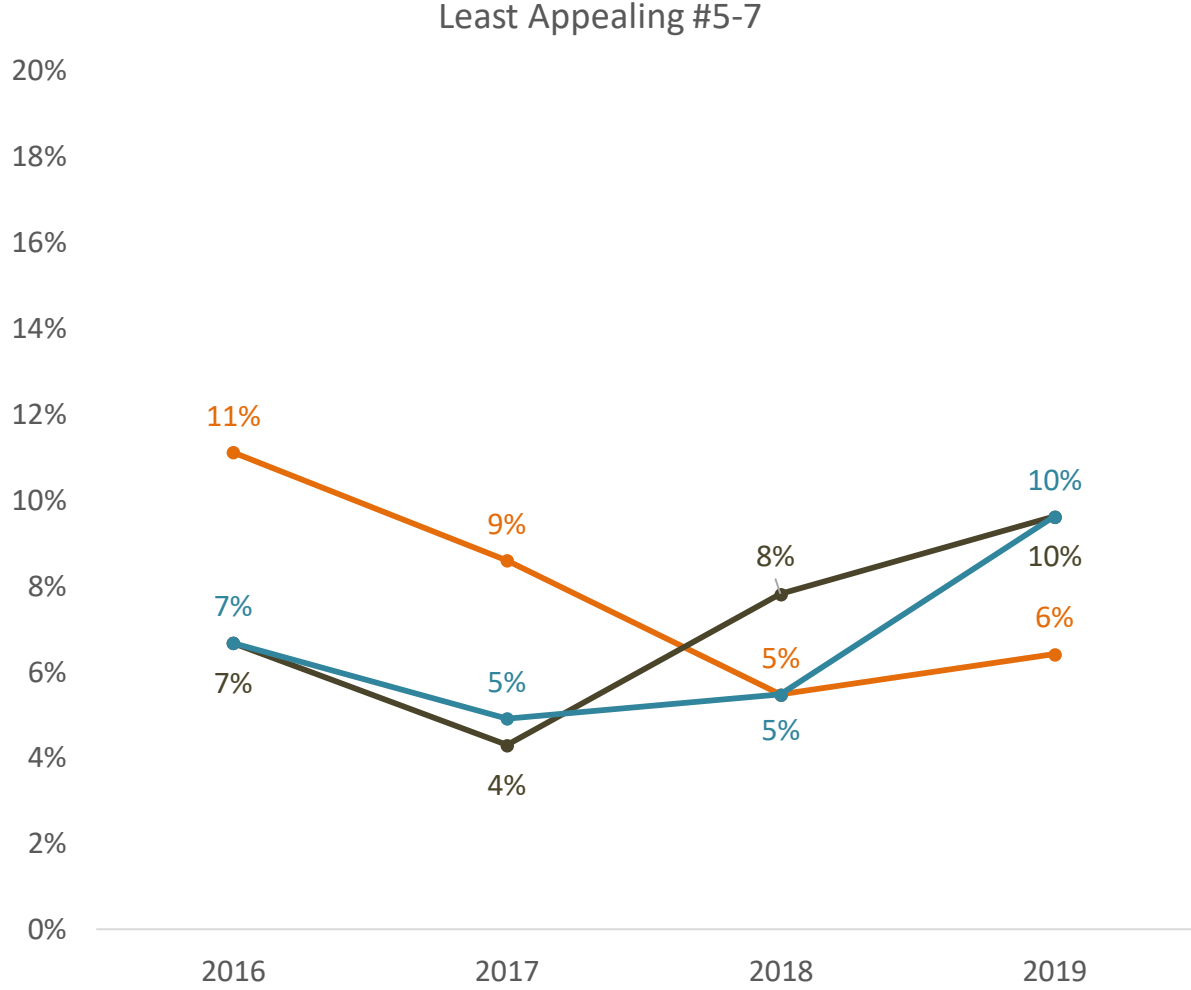
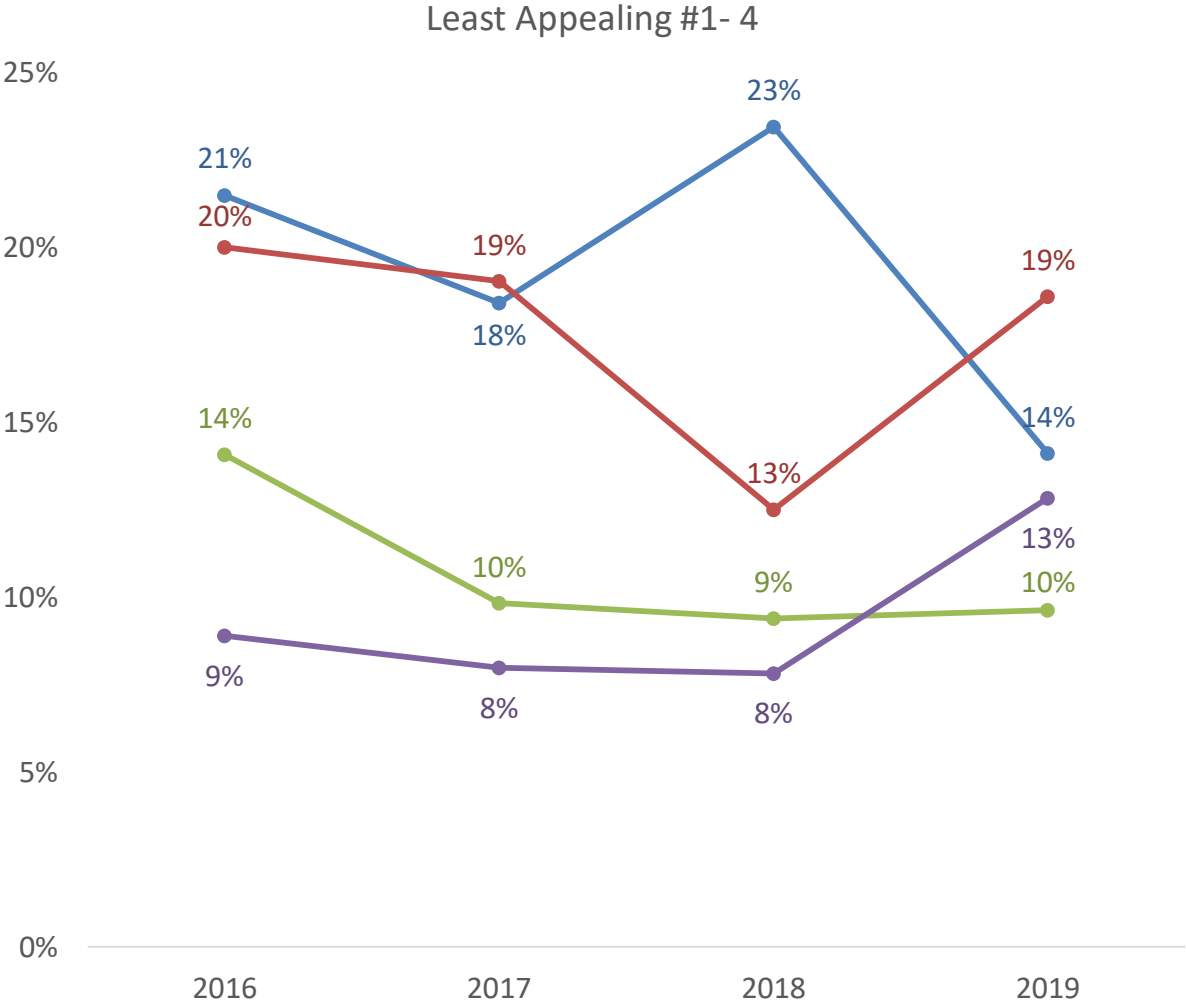
- Activities, attractions and entertainment, events
- Local people
- Environment, cleanliness, climate
- Atmosphere

Most Appealing #5-7



- Culture and history
- Food and Beverage
- Level of service

Least Appealing Aspects of visit to Vanuatu (% of comments)

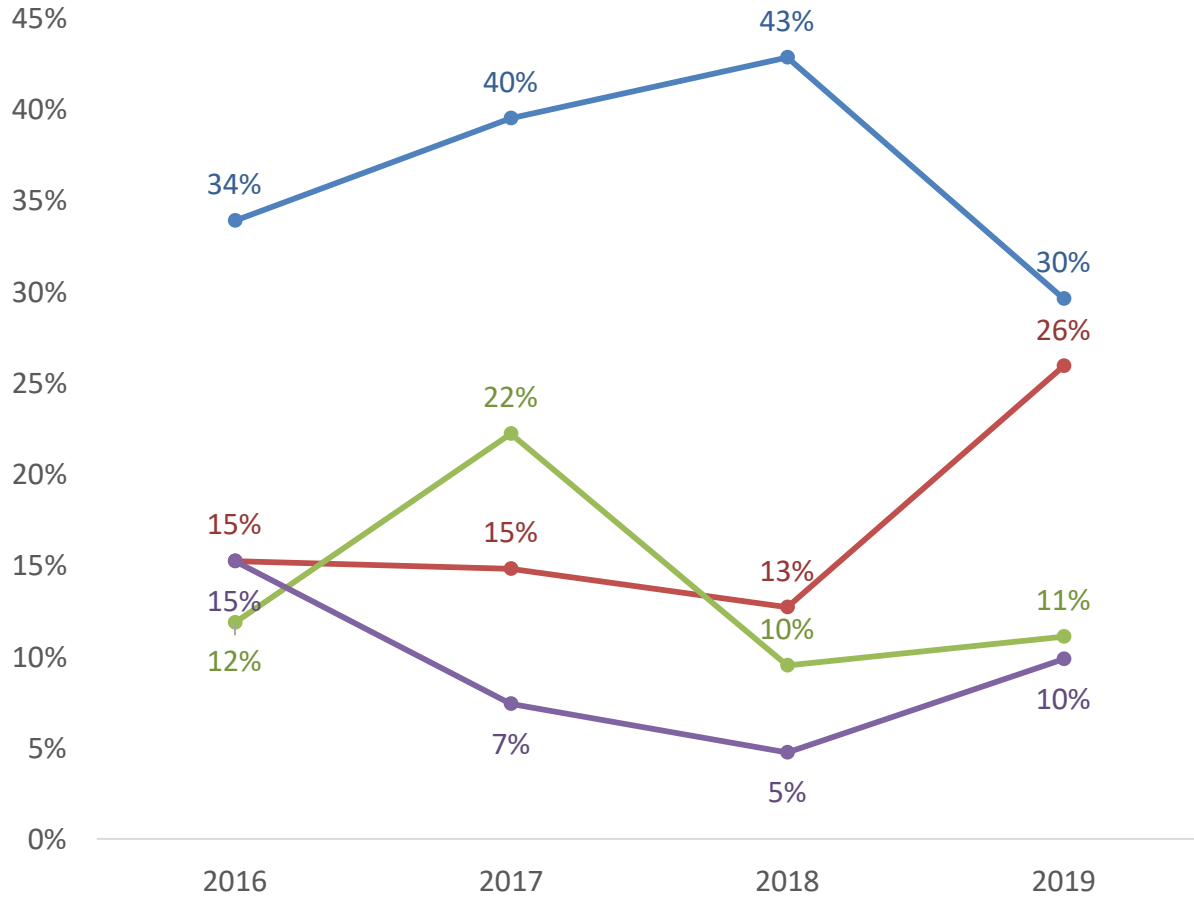


- Public services, facilities and infrastructure
- Attractions and activities
- Shops and the shopping experience

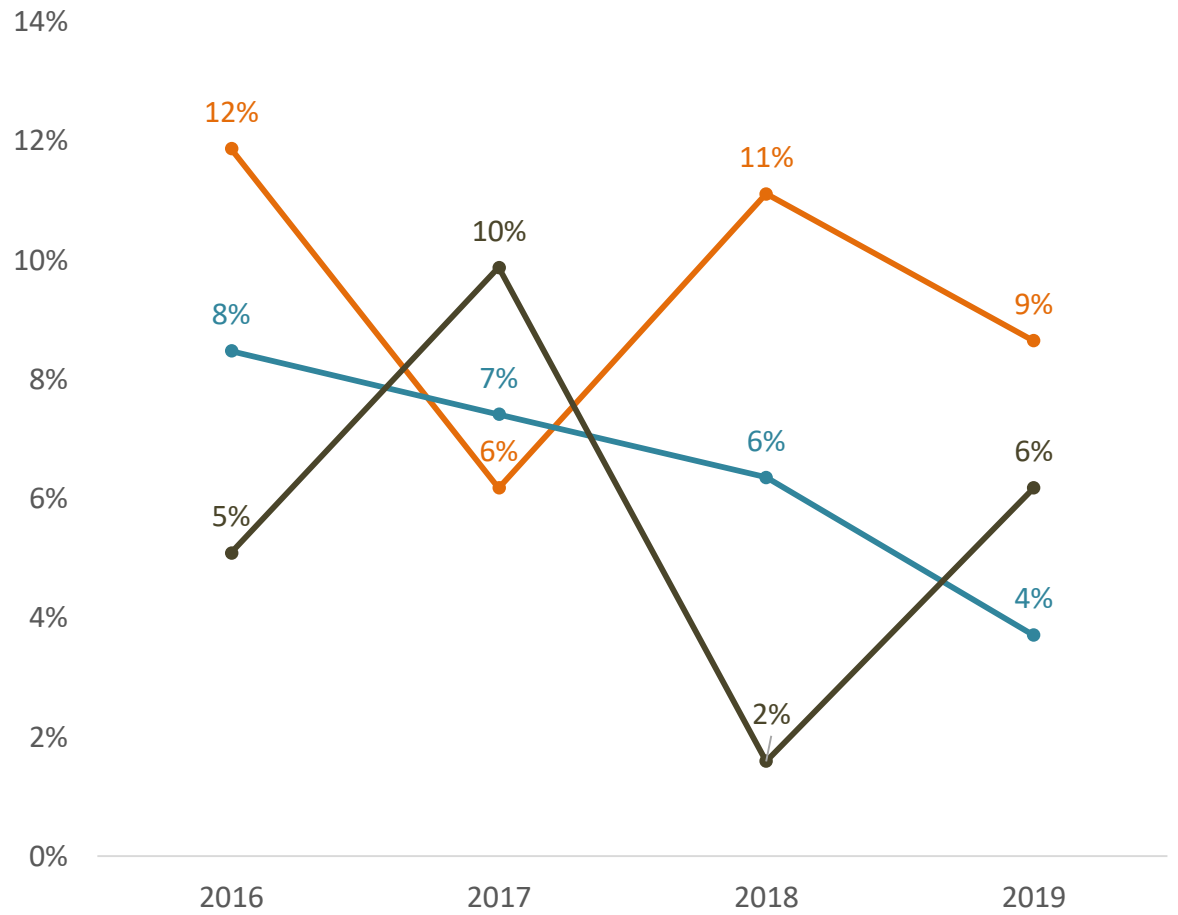
- Port Vila
- Rubbish, cleanliness and natural environment care
- Local people, standard of service

Suggestions for Improvements

Improvement #1-4



Improvement #5-7



- Public services and infrastructure
- Entertainment, activities, transport
- Charges, entrance fee, value for money
- Local People, Standards of Service

- Environment (cleanness, rubbish, nature)
- Accommodation
- Flight Related Issues



Thank you

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