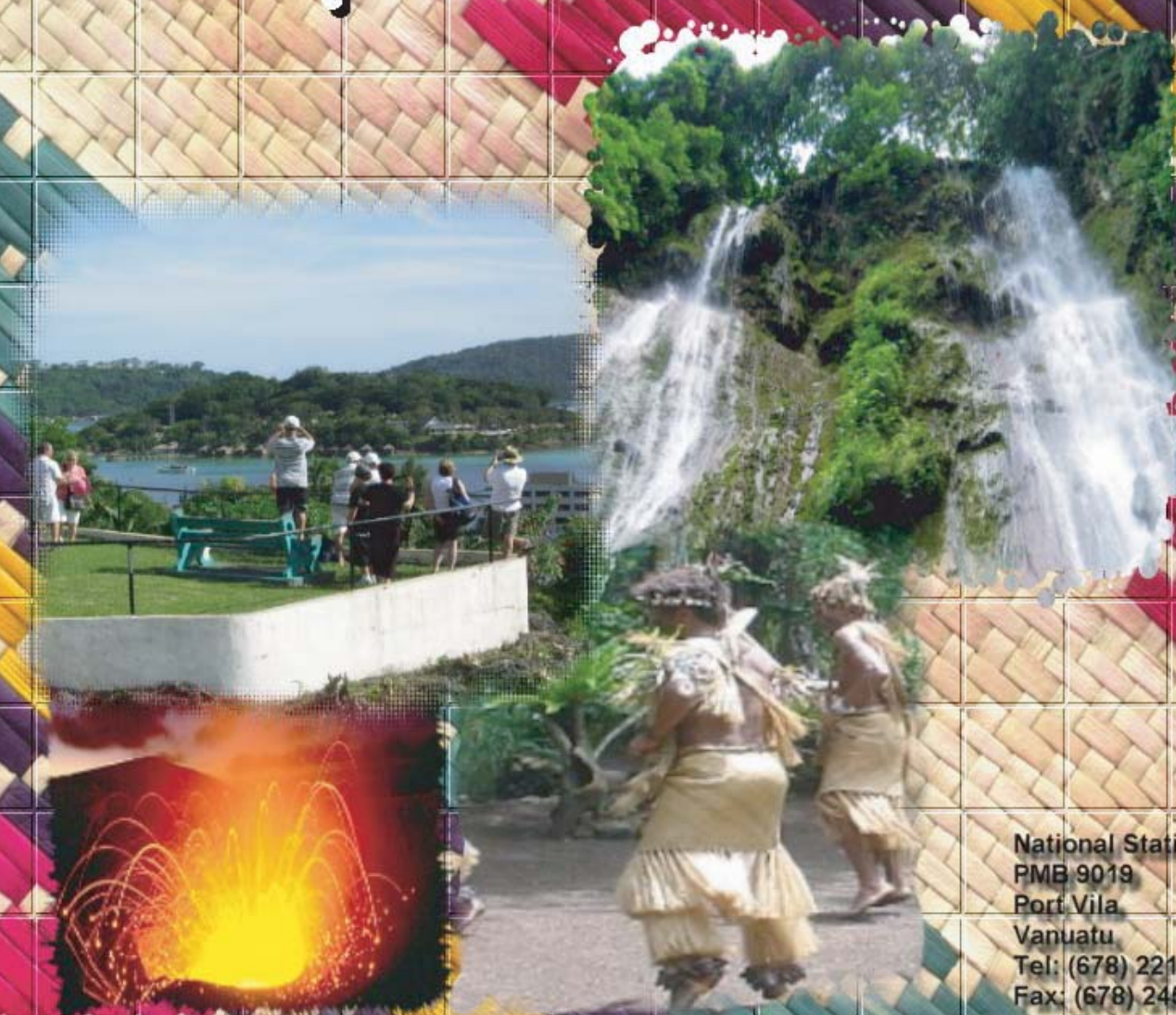




# 2004 Visitor Survey Report



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# REPUBLIC OF VANUATU



## 2.0.0.4

# Vanuatu Visitor Survey

### APPRECIATION

The Vanuatu National Statistics Office (NSO) wishes to acknowledge the assistance of the following: National Tourism Office of Vanuatu (NTO), Reserve Bank of Vanuatu (RBV), South Pacific Tourism Office (SPTO), The New Zealand Assistance for International Development (NZAid) and Visitors to Vanuatu, all of whom assisted in the collection, processing and funding of this publication.

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## **CHAPTER ONE: HIGHLIGHTS OF SURVEY FINDINGS**

### **1.1 Visitor profile**

- Annual visitor arrivals to Vanuatu continue to increase annually with the year 2004 recording 61,453 visitors.
- Australia remains the principal market for visitors to Vanuatu.(64.7%)
- Holiday makers continue to dominate visitors' purpose of visit (82.8%)
- Half (49%) of the visitors surveyed are ages between 40 and 64.
- At least half (55.4%) of the visitors surveyed travel with their spouse or partner only

### **1.2 Travel Behaviour patterns**

- Hotels, Motels and Resorts accommodation remains the choice of accommodation for visitors with 87% of visitors' interviewed.
- Almost one third (29%) of the visitors surveyed have at least once been to Vanuatu.,
- In terms of promotion, travel agent is the leading source of information for the destination. Internet has popped up in this survey to be one of main information source.
- Almost three quarters (70.2%) of the visitors surveyed travel on prepaid packages.
- At least one third (35%) of visitors surveyed plan their trip between one and three weeks.
- On average, visitors stay 8.2 days. This is unchanged since the last survey in 1997
- Apart from Port Vila, slightly more visitors visiting Tanna Island than Santo island. The Yasur volcano being the main attraction for Tanna Island.

### **1.3 Visitor Opinion and reaction**

- 88 percent of visitors surveyed say their expectations are fulfilled.
- At least three quarters (79%) say they will definitely return to Vanuatu
- Eight out of ten visitors say they will recommend Vanuatu to friends or potential visitors.
- The friendliness of the people remains the top feature that visitors enjoyed while in Vanuatu
- Facilities were the most disliked feature mentioned by visitors.

### **1.4 Visitor expenditure**

- The accommodation and meals account for almost half of internal expenditure
- Average visitor expenditure surveyed per day stood at VT19,654
- Two third (64.5%) of the total visitor expenditure surveyed is spent outside Vanuatu

## **CHAPTER TWO: INTRODUCTION**

This survey is the third of its kind to be conducted in Vanuatu. The survey is a repetition of the previous surveys conducted in 1991 and 1997 with slight modifications to the questionnaire.

### **2.1 Aims**

The aims and objective of the survey are to

- update visitor information on the tourism industry of Vanuatu
- ascertain the profiles of visitors, what they do, like and experience
- determine travel patterns and behaviour
- ascertain opinions and reactions about the destination
- determine the expenditure of the visitors visiting Vanuatu
- identify any changes that may have occurred since the last survey

The results of the survey are directed at assisting the travel industry and tourism planners, both in the public and private sector arena, to forecast and develop initiatives in the tourism industry.

### **2.2 Background**

The purpose of the survey is to collect data on recent trends and to access the patterns on travel to Vanuatu. From this information, data can be made available to support the development and formulation of tourism policies in the marketing, planning and human resource areas.

In the course of this survey, there has been close collaboration between the National Statistics Office, the National Tourism Office of Vanuatu, the Reserve Bank of Vanuatu together with South Pacific Tourism Organization (SPTO). Funding assistance has been provided by NZAID to support the inputs provided by the two Government Agencies and the SPTO.

The National Statistics Office who, in the absence of the Research & Development Division in the NTO, undertook the task of supervising the fieldwork and collecting the survey data as well as drafting the report.

The National Statistics Office conducted the survey in close collaboration with National Tourism Office (NTO) and SPTO. Interviewers were recruited and trained by the National Statistics Office to undertake the task using questionnaires.

The National Statistics Office processed all the data and SPTO and the National Tourism Office (NTO) have provided assistance with the design of the questionnaire and the drafting of the final report.

## 2.3 Definitions and Methodology

The definitions that define the survey are those governed by the same rules used by the World Tourism Organisation.

A “visitor” therefore is defined as a resident of a foreign country visiting Vanuatu and staying in the country for at least one night, but not more than three months for non-immigrant and non-employment purposes.

Tourists according to World Tourist Organisation (WTO) are people who are "travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited".

In the context of Vanuatu, the above two definitions are used interchangeably but a tourist in this sense can not stay for more than 3 months

## 2.4 Tourism Classifications

Tourists are classified into five categories:

- Pleasure Tourists
- Business Tourists
- Pleasure & Business visitors
- Visit Friends & Relatives and
- Other Purpose

Pleasure & Business visitors as a category, is not differentiated in this survey unlike previous surveys. For research purposes visitors may be classified to specific events and activities that also relates to their travel. Other definitions of importance are included below.

A **Prepaid package** usually means a travel package that incorporates the cost of airfares, accommodation, and transfers. They are usually bought from a travel agent or tour wholesaler familiar with the destination who has made prearrangements with airlines hotels and travel agents.

An **Advance payment** means any payments made prior to travel for goods and services relating to travel that are additional to costs incurred for airfares, accommodation, tours etc.

## 2.5 Interview Methodology

Like previous visitor surveys, this only covers visitors travelling by air. It was conducted by interviewing a random sample of visitors at the time of their departure from Vanuatu. The questionnaire used in this process is attached in the appendix.

The “face to face” interview was conducted at the departure lounge of the Bauerfield international airport in Port Vila, Vanuatu’s capital. This is currently the country’s only



international entry and exit point by air. The interviewing process was done after visitors had completed all departure formalities

All flight departures were covered during the survey period of 26 weeks. The systematic sample was drawn by selecting one out of three visitors reporting at the final security checkpoint. The visitor was selected for interview in the order in which they report at the checkpoint. The unit of the interview was the single traveller (in most cases, couples) who followed the same travel itinerary and share expenditure. The survey targeted 5000 questionnaires to be completed, however only 4982 forms were usable. Children were not counted for interview. In cases where a group or a family is travelling together, the group leader is interviewed instead.

For detailed analysis, the sample of 4982 covered by this interview, were classified into the travel categories as defined above.

## **2.6 Reading the Report**

The report covers the following areas:

- Visitor Profile
- Travel Behaviour Patterns and
- Visitor Expenditure

References are made to the previous survey in 1997 where information is available and relevant.

When interpreting the results, two key issues should be taken into considerations:

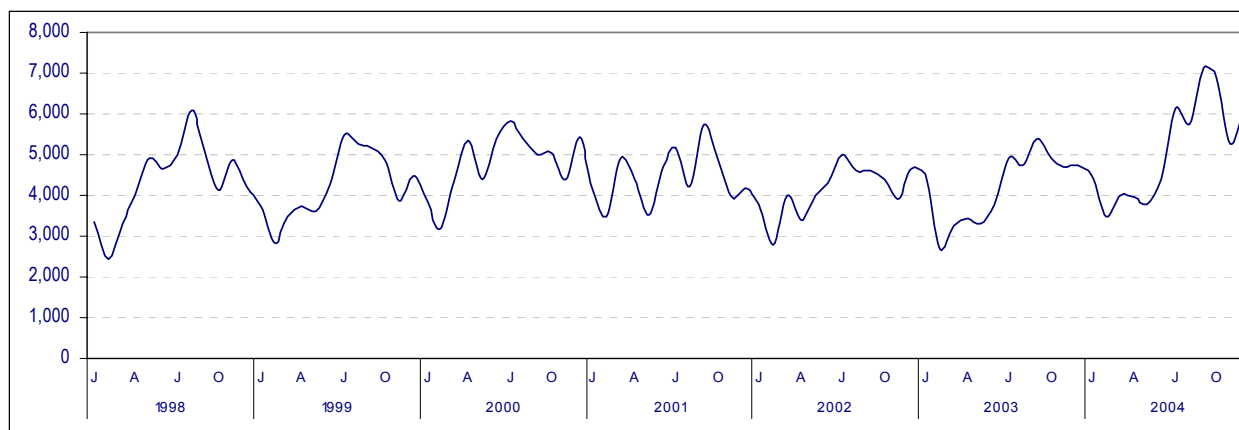
- In the same month of the enumeration of the survey, an additional Boeing 737 aircraft was leased by air Vanuatu from Air New Zealand.
- Still in the same month saw the introduction of Pacific Blue airline to Vanuatu.

## CHAPTER THREE: TOURISM IN VANUATU

### 3.1 Introduction

Arrivals since 1998 have increased by 16.4 percent from 52,085 to 61,453. In 2004, tourism arrivals in Vanuatu grew by 20.3 per cent with a total of 61,453 arrivals compared to 50,400 arrivals in 2003. This marked a significant increase, reflecting increased air capacity and competition, as well as increased market exposure in the main markets.

*Chart 1: Visitor arrivals 1998 – 2004*



The performance of the source markets, Australia, New Zealand, and New Caledonia is illustrated in Table 1. In real terms, since 1998 the greatest increase has been out of the Australian market (plus 3,909 visitors), followed by New Zealand (plus 2,040 visitors), Other Pacific countries (plus 1,099 visitors) and Europe (plus 1,051 visitors) while Japanese visitors showed a negative increase of -374 visitors. However in percentage terms the fastest growing markets have been Other Pacific countries, New Caledonia, Australia and North America.

*Table 1. Visitor arrival in Vanuatu by Market area, 1998 - 2004*

Country	1998	1999	2000	2001	2002	2003	2004	% Share 2004	% Change 2003/2004
Australia	32,498	30,769	36,805	33,667	29,730	29,492	36,407	59.2	23.4
New Zealand	6,180	6,487	8,024	7,512	7,263	7,729	8,220	13.4	6.4
New Caledonia	5,824	5,037	4,124	4,039	4,704	5,050	6,630	10.8	31.3
Other Pacific countries	2,080	2,317	2,039	2,182	1,828	2,034	3,179	5.2	56.3
North America	1,297	1,343	1,547	1,413	1,438	1,625	1,954	3.2	20.2
Europe	2,337	3,063	3,401	2,683	2,948	3,003	3,388	5.5	12.8
Japan	965	915	811	834	731	571	591	1.0	3.5
Other Countries	871	764	831	936	803	881	1,084	1.8	23.0
Not Stated	33	51	9	34		15	-		
<b>Total</b>	<b>52,085</b>	<b>50,746</b>	<b>57,591</b>	<b>53,300</b>	<b>49,445</b>	<b>50,400</b>	<b>61,453</b>	<b>100</b>	<b>21.9</b>

The table above shows that the majority of arrivals to Vanuatu by source market were predominantly from Australia (59 per cent), New Zealand (13.4 per cent) and New

Caledonia (10.8 per cent). During the period 1998 to 2004 the most New Zealand has increased its market share from 11.9 percent to 13.5 percent, whilst Europe, USA and Other Pacific countries market shares have also increased slightly. Australia's market share has declined (from 62.4 percent to 59.0 percent), but is still dominant overall.

Vanuatu visitor arrivals ranked 6<sup>th</sup> amongst the 12 SPTO member countries<sup>1</sup> in 2004, moving up from the 7<sup>th</sup> place in 2003. This is an indication of the increasing popularity of Vanuatu through promotion as being a favourable tourist destination

### 3.2 Government Policy Development

The Government endorsed Tourism Development Master Plan prepared by the World Tourism Organisation in 1995. This Plan was reviewed in 2003 with the assistance of the Commonwealth Secretariat. The Vanuatu Tourism Development Master Plan 2004 – 2010 resulted from this review.

The *Vanuatu Tourism Development Master Plan 2004 – 2010* was prepared with the following objectives stipulated in the Terms of Reference:

- To review and update the VTMP taking into account key internal and external factors and influences and the implementation of the Tourism Master Plan achieved to date;
- To develop development sector strategies and action plans for the next five years and to present these in the form of a Five-Year Tourism Development Plan; and
- To identify required stakeholders interventions for the sector including technical assistance requirements and priority assisted projects.

The Government has incorporated the major strategies to develop tourism into their major economic policy document 'Priorities and Action Agenda – Supporting Sustainable Development'. The following six strategies are outlined in this latter document for action in the tourism sector for supporting and sustaining tourism development.

- Double the NTO marketing budget. A marketing plan to be drawn up and the industry to match NTO marketing funds provided by the Government.
- Increase airline capacity through the following mechanism: developing strategies to Air Vanuatu's services, invite other airlines through the open sky policy and finalise international air services agreements to commence services between Tanna and New Caledonia and international services to Santo.
- Tourism Development Office (TDO) to develop incentives package for existing and new developers, and to promote package through VIPA.
- Develop tourism infrastructure into the rural areas by improving infrastructure at product sites such as telephones and roads and this should be within the existing infrastructure; tourism awareness program via communities and schools; invite other airlines to operate in the domestic routes and provide a link to domestic schedule to coincide with international flights.
- Finalise the development of the accreditation program.
- Adopt the Tourism Master Plan.

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<sup>1</sup> Cook Islands, Fiji, French Polynesia, Kiribati, New Caledonia, Niue, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu and Vanuatu. China is also a SPTO member country.



### 3.3 Current Events in Vanuatu

The Vanuatu Tourism Office is currently preparing a Destination Marketing Plan for Vanuatu. This Plan will establish a coordinated program of marketing activities, with a view to growing the yield and number of visitor arrivals. AusAID has funded a Marketing Manager for the VTO for a two year period who is assisting in this task.

Air Vanuatu has taken over the domestic air service known as Vanair, by the end of the year there will only be one brand name, Air Vanuatu International and Air Vanuatu Domestic, with the amalgamation of both airlines comes increase in capacity and frequency on the Vila/Santo route as well as on the Noumea route. By late November 2005 Air Vanuatu will commence flights between Tanna and New Caledonia for the week- end visitor trade.

Pacific Blue commenced services from Sydney, Melbourne and Brisbane to Port Vila in 2004. Whilst these services have now been reduced (with the withdrawal from the Melbourne route), this extra capacity and price competition provided a much need boost to the tourism industry.

Vanuatu tourism has benefited from increasing publicity from a series of one off events; these include the Survivor TV series which was shown world wide which provided a showcase for Vanuatu tourism product. Special events have also become increasingly important in promotion of the destination and the Round Island Relay and the Vanuatu Ocean Swim have become increasingly successful.

### 3.4 Accommodation Stock

Accommodation statistics indicate that there was a decline in available rooms in 2004. The same statistics however, indicate that there was a significant growth of available beds by 161.3 per cent or 3,823 more beds in 2004. However these figures are being released unadjusted and are subjected to non response than actual decline in itself. Table 2 below points out accommodation developments over the last five years in Vanuatu.

*Table 2. Accommodation in Vanuatu*

	2000	2001	2002	2003	2004	% Change 2004
<b>Hotels</b>	29	29	29	29	29	0
<b>Rooms</b>	1,060	1,044	993	895	874	-2.3
<b>Beds</b>	2,911	2,737	2,662	2,370	6,193	161.3

Changes in ownership have taken place at several of the major establishments since 1998. Current ownership of the major hotels is as follows:

- Le Lagon Resort – 140 rooms – Warwick Resorts (France)
- Le Meridien Resort – 155 rooms – international management group head quartered in the UK
- Iririki Resort – 70 rooms – Australia
- The Melanesian – 79 rooms – Japanese

Since the last visitor survey in 1998 many small to medium sized properties have opened in Port Vila and Santo including Chantilly's on the Bay, Mangoes, Breakas, and Sunset bungalows, whilst existing properties have undergone major refurbishments (such as Erakor Island Resort).

### **3.5 Tourism Foreign Exchange Earnings**

Visitor expenditure in Vanuatu in 2004 totalled Vatu 7.865 billion or USD 74 million<sup>2</sup>.

*Table 3. Total expenditure of visitors (USD millions)*

	2000	2001	2002	2003	2004
Visitor Expenditure	46.2	44.1	45.6	55.1	74

In 2004, GDP was recorded at USD 247 million, thus tourism earnings as a proportion of GDP accounted for 30 per cent. This shows the growing economic importance of the tourism sector.

### **3.6 Number of Persons Employed**

Difficulty in classification and data inadequacies mean that estimates of the number of people employed in the tourism sector vary considerably. The total number of persons employed in the tourism industry has been estimated to be between 3,000<sup>3</sup> and 16,000<sup>4</sup>, (according to a recent SPTO study on the Economic Impact of Tourism in SPTO Member Countries. These estimates represent 3.9 to 21 per cent of the total labour force (76,370).

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<sup>2</sup> The Economic Impact of Tourism in South Pacific Tourism Member Countries – July 2005

<sup>3</sup> The Economic Impact of Tourism in South Pacific Tourism Member Countries – July 2005

<sup>4</sup> World Travel and Tourism Council – Estimates of Tourism Impacts 2005

## CHAPTER FOUR: VISITOR PROFILE

The 2004 profile of the visitors to Vanuatu has not changed dramatically in its composition from the 1997 survey. Some common characteristics were still maintained.

### 4.1 Surveyed Visitors by Market area

Australia still maintains itself as the dominant market of visitors to Vanuatu followed by New Zealand.

*Table 4: Distribution of visitor by market area*

Market Area	Year	
	1997	2004
Australia	64.6	67.4
New Zealand	20.1	13.8
Pacific	0.7	7.5
USA	6.9	1.8
Canada	2.1	0.7
UK	0.4	2.5
France	1.1	1.7
Other Europe	1.2	2.9
Japan	1.6	0.7
Other Asia	0.5	0.6
Other countries	0.5	0.3
Total	100	100

Repeat visitor numbers continued to grow and there is a growing tendency to spend on commodities such as meals, some shopping, purchase of tours, and use of local transport since the 1997 survey.

The respondents represented two thirds of the Australian holiday market (67.4%) and 13.8 percent of the New Zealand holiday market. The Pacific Island travellers comprised 7.5 percent and other countries account for the remaining proportions

*Table 5. Breakdown of surveyed visitor by market area and purpose of (%)*

Purpose of visit	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
Holiday only	86.4	80.7	68.9	62.6	65.7	79.7	70.9	84.9	57.1	46.9	71.4	82.8
Business only	7.3	13.2	18.2	13.2	25.7	13.0	14.0	8.9	31.4	50.0	14.3	9.9
VFR	3.8	3.2	9.4	15.4	5.7	2.4	15.1	4.8	5.7	3.1	7.1	4.6
Other	2.4	2.9	3.5	8.8	2.9	4.9		1.4	5.7		7.1	2.7
Total	100	100	100	100	100	100	100	100	100	100	100	100

The majority of arrivals from the remaining markets of Europe and North America and Asia were mainly business travellers and visiting friends and relatives rather than holiday-makers.

The VFR market represented 3.4 percent of the 1997 sample and 4.6 percent of the 2004 visitor arrivals.

The "Others" category represented 8.3 percent in 1997 and decreased to 2.7 percent in 2004. This category includes religious activities, sports, educational and medical activities etc.



Australia being the main market, most of its visitors come from the state of New South Wales followed by Queensland. One obvious reason was that there are regular direct flight from Port Vila to the two states.

*Table 6: Distribution of visitors from Australia by state (%)*

Australian State	Holiday	Business	VFR	Others	Total
New South Wales	41.4	38.8	28.5	46.9	40.9
Queensland	30.1	32.9	35	28.4	30.4
Victoria	18.1	18.8	25.2	11.1	18.2
South Australia	3.9	0.8	4.1	2.5	3.7
Australian Capital Territory (ACT)	2.4	3.3	1.6	3.7	2.5
Western Australia	2	2.5	1.6	3.7	2.1
Tasmania	1.7	1.3	2.4	2.5	1.7
Northern Territory	0.4	1.7	1.6	1.2	0.6
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

## 4.2 Surveyed Visitors by Purpose of Visit

Over all respondents showed that the main purpose of visit to Vanuatu was for holiday. Holiday makers continue to dominate arrivals to the destination in 2004 accounting for 82.8 percent of the sample compared to 73.7 percent recorded in the 1997 survey

The proportion of **“Business travellers”** (9.9%), ranked second by purpose of visit and in the 1997 survey it accounted for 9.4 percent of the respondents. Of the respondents who replied to this question, half of the business travellers came mainly from Australia , New Zealand (18.4%), and the Pacific Islands (13.8%).

**“Visiting Friends and Relatives”** traffic though small was evident in most markets. In 2004 it recorded 4.6 percent compared to 3.4 percent seven years ago.

The remaining category **“Others”** decreased from 8.3 percent in the 1997 survey to 2.7 percent in 2004. Included in this category, sports, tours, church group meeting and activities.

## 4.3 Age Category of respondents by Source Market

Respondents from the various source markets were asked to list their age within the five age categories listed in the questionnaire

Australia which represents one third of the respondents dominated with at least two thirds majority in all age groups. Except for the United States, Canada, Japan and Other Asian countries, at least half of the visitors in each country are between the ages 40 to 64 meaning older people seemed to travel more than younger ones. The situation is reversed for the countries mentioned.

Only 2 percent of the visitors captured were in the age group of less than 20 years of age. One reason being that the systematic sampling method only counts every third adult and

conducts interview with him or her. Children or youths are most likely to travel with an adult in which case the parent or group leader is interviewed. Another reason would be that youths or children are likely to be in schools at the time of the survey.

#### 4.4 Age Group by Purpose of Visit

In addition to establishing a profile of the ages that travels to Vanuatu, respondents were also asked to identify and state the purpose of visit trends and patterns.

*Table 7: Purpose of visit by age group (%)*

Purpose of visit	<20	20 - 29	30 - 39	40 - 49	50 - 64	65+	Total
Holiday only	82.7	86.4	83.7	84.3	78.5	76.4	82.8
Business only	4.1	6.3	9.6	9.9	13.5	11.2	9.9
VFR	11.2	3.9	3.6	3.6	5.4	10.4	4.6
Other	2.0	3.3	3.1	2.2	2.6	2.0	2.7

At least three quarters of the visitors in each age group come for holiday only. One in ten visitor come for business only while other purpose of visit compose of

very small proportion in each age group

*Table 8: Age group by purpose of visit (%)*

Age group	Holiday only	Business only	VFR	Other	Total
<20	2.0	0.8	4.8	1.5	2.0
20 - 29	21.9	13.4	17.9	25.9	21.0
30 - 39	23.0	22.1	17.9	25.9	22.8
40 - 49	25.6	25.1	19.7	20.0	25.1
50 - 64	22.9	33.0	28.4	23.0	24.1
65+	4.6	5.7	11.4	3.7	5.0
Total	100	100	100	100	100

#### 4.5 Previous Visits

Respondents were asked if they had visited the destination before. There were 1433 respondents to this section. This represents 28.8 percent of the survey sample. This proportion still remains almost the same to the 1997 survey of 27.9 percent of previous visitors to Vanuatu.

However, by purpose of visit, the proportion of repeat visitors to Vanuatu for holiday has increased from 56.5 percent in to 68.1 percent in 2004. About one in five visitor who once visited Vanuatu came back for holiday. This proportion still remains the same to the 1997 survey. Visiting friends and relatives has a slight increase while other purpose of visit has decrease from 8 percent to 2.9 percent of previous visitors. This implicates the importance of Vanuatu as a destination for holidaymakers.

*Table 9: Previous visit by purpose of visit (%)*

Visit Vanuatu before	Holiday only	Business only	VFR	Other
Number	976	288	128	41
Percentage	68.1	20.1	8.9	2.9

An additional question was asked whether any previous visits to Vanuatu on a cruise ship and 5 percent of those who once visited Vanuatu indicated that they have done so.

The survey also asked if travellers have once visited the south Pacific region. This question is targeting countries outside the Pacific including Australia and New Zealand rather than Pacific Island countries. These countries comprise of 92.5 percent of the respondents. Out of this 'outside' Pacific countries, almost half (47.2%) of the visitors have at least visited a South Pacific island country before. Surprisingly, less Australians have visited the South Pacific than previous visitors while for New Zealanders interviewed, there are more previous visitors to the South Pacific than those new visitors.

*Table 10: Visitors by Previous Visits to the South Pacific and Purpose of Visit*

Visit South Pacific before	Holiday only	Business only	VFR	Other	Total visited before
Number	1,691	310	123	52	2,176
Percentage	77.7	14.2	5.7	2.4	100

#### 4.6 Travel Companions

More than half of the respondents in the survey travelled with their spouses or partners (55.4%), followed by Family travellers (21.3%). In 1997, lone or free independent travellers were second to travellers in couples.

More than half of the Australian market (57.8%) travelled with their companions or partners compared to 44.8 % of the New Zealand market. The highest rate of single travellers was evident amongst **Other** (50 %), followed by the Japanese (42.9%) despite the small numbers in the sample. Two thirds of UK visitors (65.9%) and Other European countries (58.9%) visitors travel with family.

*Table 11: Visitor by travel companion and market area (%)*

Travel companion	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count	Total
Alone	8.0	12.9	23.6	26.4	28.6	18.7	22.1	23.3	42.9	31.3	50.0	11.8
Spouse/Partner only	57.8	53.6	44.8	44.0	40.0	65.9	43.0	58.9	37.1	31.3	21.4	55.4
Family	23.5	19.6	19.0	8.8	11.4	8.9	20.9	8.9	5.7	15.6	28.6	21.3
Group/friends	10.7	13.9	12.6	20.9	20.0	6.5	14.0	8.9	14.3	21.9		11.5
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>
<b>Respondents</b>	<b>3,357</b>	<b>690</b>	<b>373</b>	<b>91</b>	<b>35</b>	<b>123</b>	<b>86</b>	<b>146</b>	<b>35</b>	<b>32</b>	<b>14</b>	<b>4,982</b>

Overall, the proportion of visitors travelling alone has decline while families travelling together has increased a lot since 1997. This shows the importance group travellers.



**Table 12: Visitor by Travel companion and Purpose of Visit (%)**

Travel companion	Holiday only	Business only	VFR	Other	Total
Alone	6.0	48.4	32.8	19.3	11.8
Spouse/Partner only	59.7	30.2	40.2	42.2	55.4
Family	23.5	5.3	20.1	15.6	21.3
Group/friends	10.8	16.2	7.0	23.0	11.5
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

**Table 13: Visitors by Travel Companion and Age Categories (%)**

Age group	Alone	Spouse/Partner only	Family	Group/friends	Total
<20	1.7	1.2	2.5	5.1	2.0
20 - 29	15.6	25.6	9.7	25.1	21.0
30 - 39	23.3	21.7	25.4	22.3	22.8
40 - 49	24.4	20.2	40.7	20.8	25.1
50 - 64	28.0	25.9	18.1	23.0	24.1
65+	7.0	5.4	3.6	3.7	5.0
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Individual travellers are not restricted to any age group between 20 and 64. Family travellers are found most between the age group 40 to 48 year of age.

## **CHAPTER FIVE: TRAVEL BEHAVIOUR PATTERNS**

This chapter explores the various behavioural patterns of consumers associated with the decision-making and planning required when deciding on a destination to visit.

### **5.1 Objective of questions:**

The objective of these questions was to ascertain from visitors what sources of information they access, and where it was most effective. How potential visitors plan and select their travelling destination is critical for the tourism industry. For this purpose it was essential to find out where people are coming from, what they were reading, who they were, how accessible they were. From here one could establish a profile that would lead and direct tourism managers to build up patterns about the market they can develop.

This information enables business entrepreneurs and tourism planners to accommodate for the needs of the repeat or potential consumer, ensure products are effectively marketed and promoted, and to gauge new opportunities for potential visitors.

The visitor spend also provides us with an idea of consumers buying power and more importantly how to cater for their needs increase visitor spend in the destination.

### **5.2 Background – Marketing at the National Tourism Office**

As background to the responses of the survey for the following questions it is important to make a note of some of the marketing activities undertaken by the National Tourism Office.

One of the most important and expensive activities for National Tourism Offices and the private sector budget is the cost of marketing and promoting the destination. Without this budget it is almost impossible to take the product to the market and to compete for a place in the consumers basket of holiday choices at the international market.

Marketing and Promotion takes many forms.

- a) Travel writers submit articles for publication in major daily magazines and newspapers, items on Television programmes feature destinations on special features.
- b) Familiarisations are carried out annually. They are coordinated either by the NTO, Airlines or by their associated travel wholesalers. Their objective, to update and educate travel agents and tour wholesalers.
- c) Travel Trade Shows are attended each year by the NTO's and private sector. ITB Berlin and WTM London, Australia Pata Exchange are co-ordinated by TCSP together with the NTO. The high costs of countries attending individually make it more effective to attend through TCSP although there is the option to attend individually.

- d) The increase accessibility to the worldwide web has contributed a lot to online promotions from within and outside Vanuatu.

At all these events, there is a desire to ensure that services rendered free of charge or at a high cost has a productive return for the Industry in terms of arrival numbers. Marketing campaigns are constantly updated to ensure the destination is connected to the needs of the potential consumers in the market place.

Travel to any destination in the world, requires up to date information. A tremendous amount of money is invested to inform and produce information to guide, influence, tempt and direct consumers and the trade to their product and destination. This may require covering a specific market or a certain clientele.

### **5.3 Rating of Decision Making Factors**

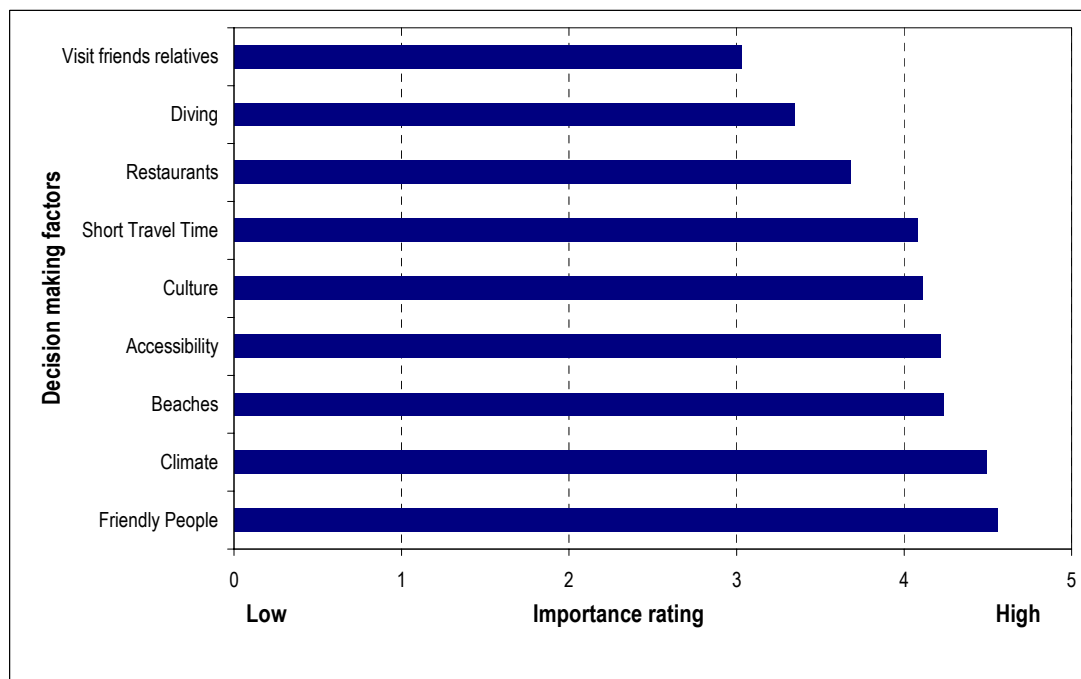
Respondents were asked to rate how important the following factors were in making their decision to visit. Ratings of 5 implicating high importance and 1 with low<sup>5</sup>.

1. Not Important
2. Not so Important
3. Some Importance
4. Important
5. Very Important

The friendliness of the people remains the top factor for visitors in deciding to come to Vanuatu. This factor is true for other countries decision-making. While visiting friends and relatives was rated with least importance from others, its rating is high enough to conclude that all factors listed are all important.

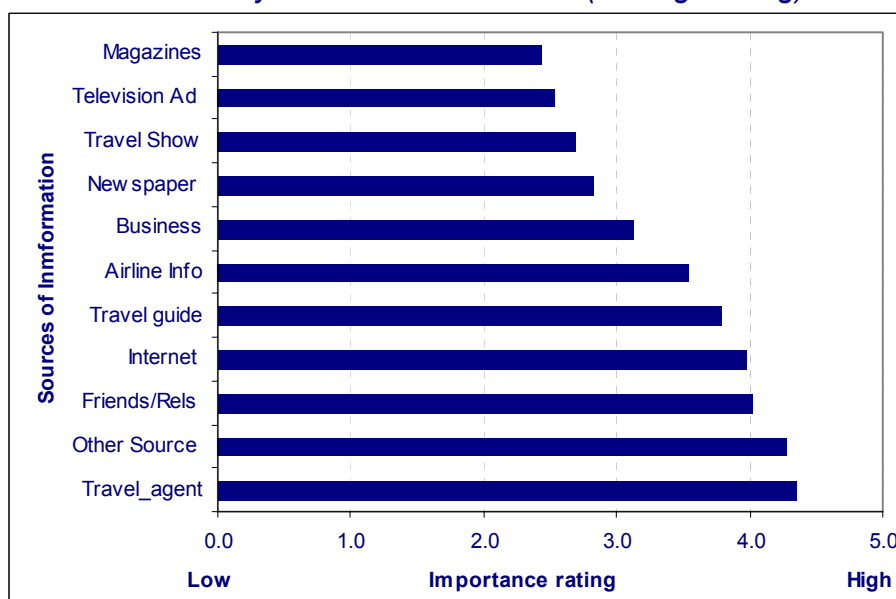
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<sup>5</sup> This rating was reversed in the 1997 survey

**Chart 2. Visitors by Decision making Factors (average rating)**

#### 5.4 Important Sources of Information by Purpose of Visit

When asked to rate the significant sources of information related to travel plans, the travel agents was highly rated. Internet, which was not included the previous survey, this time, appeared to be one of the very important sources of information; this is possible with the recent rapid growth in access to computer technology.

**Chart 3. Visitors by Source of Information (average rating)**

The survey showed that travel agents played an important role in providing information to all visitors. Internet has become the second highest rating for holidaymakers. Travel Show and advertisement that have dominated the rating in the previous survey find themselves at the bottom rating this time though still important as source of information.

## 5.5 Visitors by favourite Source of Information of the destination

Respondents to the survey showed a varied interest in sources that include Magazines, News Papers, Travel Guide books and Websites. Although responses for these sections were low, we were able to establish some findings. The response rates for the sections are as follows: Magazines (5.1%), News papers (11.6 %), Travel guide books (18.6%) and Websites (10.7%)

Respondents seemed to mix up Travel Guide books with Magazines therefore responses tend to mix up in these two categories. In-flight Magazines of airlines dominated the magazines list reported by respondents. This included the Island Spirit by Air Vanuatu, Qantas in-flight magazine and other in-flight magazines that carry information about the country. Other regularly mentioned magazines were Jason's Guide, Le Point, L'Express, Destination South Pacific, Cosmopolitan, Diving Magazine, Gourmet Traveller, Women's Weekly, Cosmopolitan, Adventures in Paradise magazines.

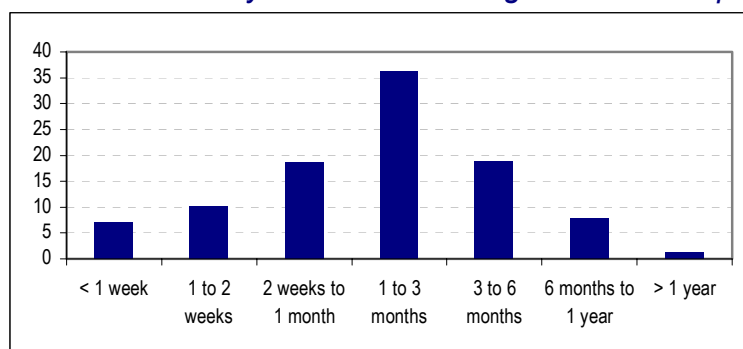
Newspapers are no doubt good information sources. The big names such as the Telegraph, Herald, Post, Courier mail are among the regular names that respondents mention. For other countries such as the French territory of New Caledonia, it is Les Nouvelles Caledoniennes that dominated their list.

Lonely Planet dominated the Travel Guide books. Again, Travel Agent, and in-flight magazines were regularly mention here. Pamphlets and Brochures were also vividly identified in this category to be of important source of information.

More respondents fill in the website section than the magazines. There are some features clearly identified from the responses.

- The accessibility to internet and availability of the search engines especially Google and Yahoo enabled visitors to find information very easily. The search engines were able to take the surfer to any website that provides appropriate information of any destination using keywords.
- most airline agents have websites therefore visitors gather most information from them.
- Main hotels and resorts in the country also provide information on their web.

*Chart 4: Visitors by Advance Planning Time and Purpose of Visit (%)*



It appears that the airline and accommodation are the two essential component of any travelling therefore visitors would want to know more about them by visiting their own websites. The National Tourism Office also plays very big role in providing



information on its own website as well as other promotion means.

Overall the majority of visitors, by purpose of visit, required a planning period of between one and three months to plan their visit (36.1%). At least 18 percent took three months or more. Only 7.0 percent of the sample decided to travel in one week.

Holiday travellers tended to plan from between one to three months. At least half of the visitors plan their trips between one and six months and one in three visitor interviewed plan their trip less than a month. Two thirds of the Business travellers plan their trip in less than a month. In other words they are more flexible and required the least time to make travel arrangements.

**Table 14: Visitors by Travel Arrangement and Market Area (%)**

Arrangement	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
Independent	23.6	27.1	54.4	68.1	54.3	48.0	54.7	47.3	71.4	53.1	50.0	29.8
Prepaid	76.4	72.9	45.6	31.9	45.7	52.0	45.3	52.7	28.6	46.9	50.0	70.2

At least two thirds of visitors travel on prepaid packages. This is true especially for New Zealand and Australia while all the rest of the countries have a much lower proportion of its visitor travelling in prepaid packages.

## 5.6 Visitor by Multi-Destination Trips and Market Area

**Table 15: Visitor by Multi-Destination Trips and Market Area (%)**

Market area	Did not visit other destinations	Visit other destinations
Australia	97.6	2.4
New Zealand	94.3	5.7
Pacific Islands	73.2	26.8
USA	45.1	54.9
Canada	60.0	40.0
UK	52.0	48.0
France	41.9	58.1
Other Europe	38.4	61.6
Japan	45.7	54.3
Other Asia	56.3	43.8
Other countries	64.3	35.7
Total	89.5	10.5

The question asks whether visitors visit other countries before coming to Vanuatu. One in ten of travellers travelled to more than one destination during their visit. Currently the direct flights from Port Vila are to the following destinations: Nadi (Fiji), Noumea (New Caledonia), Auckland (New Zealand), Brisbane, Melbourne (Australia) and Honiara (Solomon Islands). Visitors outside these countries will have to come via these destinations.

## 5.8 Visitor by Multi-Destination Trips and Purpose of Visit

Visitors from countries other than Australia, New Zealand, New Caledonia, Fiji and Solomon islands have to pass through other countries before coming to Vanuatu. Air Vanuatu direct flights only to these countries mentioned.

**Table 16: Visitor by Multi-Destination Trips and Purpose of Visit (%)**

Visit other countries	Holiday only	Business only	VFR	Other	Total
Did not visit other destinations	91.0	80.2	84.7	88.1	89.5
Visit other destinations	9.0	19.8	15.3	11.9	10.5
Total	100	100	100	100	100

Most of the business travellers visit more countries including Vanuatu than holidaymakers

**Table 17: Visitor by prepaid package distribution and market area (%)**

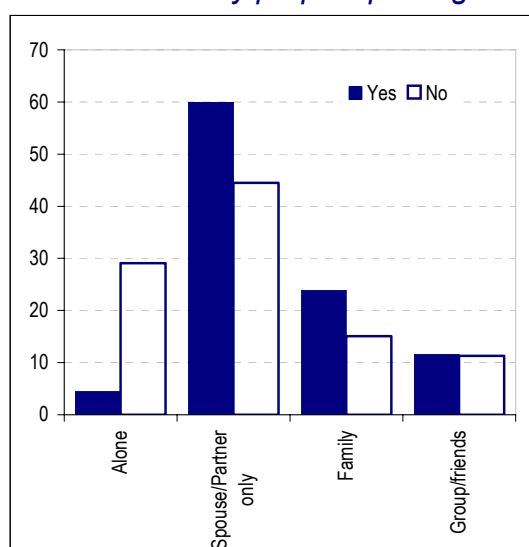
Pre-paid package	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth. count.	Total
Respondents	2566	503	170	29	16	64	39	77	10	15	7	3496
Percentage	76.40	72.90	45.60	31.90	45.70	52.00	45.30	52.70	28.60	46.90	50.00	70.20

Mostly visitors from Australia and New Zealand use prepaid package. Other countries such as in North America and Europe, less than half of their visitors coming to Vanuatu travel in prepaid package

**Table 18: Visitor by pre-paid package distribution and purpose of visit (%)**

Pre-paid package	Holiday only	Business only	VFR	Other	Total
Yes	78.0	31.6	21.0	56.3	70.2
No	22.0	68.4	79.0	43.7	29.8
Total	100	100	100	100	100
Respondents	4,124	494	229	135	4,982

Three quarters of the holidaymakers travel on prepaid packages while business travellers and visiting friends and relatives have less than one third travelling in packages.

**Chart 5. Visitor by prepaid package and Travel Companion (%)**

Prepaid packages are used mostly by those travelling in groups. Only a quarter of the lone travellers travel on prepaid package.

The question asks if any other payments made excluding the prepaid payments. One in ten of those who travel in prepaid package made some other advance payments. At least a quarter (28.1%) made some advance payments including those who have made prepaid packages payments. There are 8.3 percent of those have made prepaid package also made other advance payments.

*Table 19: Visitor by other advance payment distribution and purpose of visit (%)*

Advance payments	Holiday only	Business only	VFR	Other	Total
No	91.5	94.2	93.8	93.4	91.7
Yes	8.5	5.8	6.3	6.6	8.3
Total	100	100	100	100	100

*Table 20: Visitor by other advance payment distribution and Market area (%)*

Advance payments	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
No	91.9	91.1	91.2	100.0	87.5	92.2	94.9	92.2	90.0	86.7	57.1	91.7
Yes	8.1	8.9	8.8		12.5	7.8	5.1	7.8	10.0	13.3	42.9	8.3
	100	100	100	100	100	100	100	100	100	100	100	100

Again, advance payments made by market area after having made prepaid payments is uniform. According to this survey, the United States does not seem to make any advance payments.

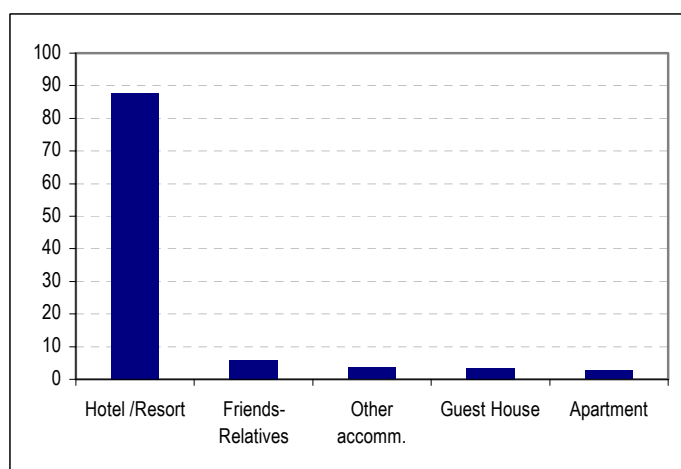
*Table 21: Visitor itemised advance payment distribution by market area (%)*

Market area	Accomm	Airline	Tours	Hire Cars	Advance payments concentrate on airline. Three quarters of the advance payment made on airline with one third for the accommodation. Usually for any travellers, these two things appeared to be of priorities for confirmation by making payments before any other arrangements.
Australia	32.5	75.2	6.9	2.6	
New Zealand	37.3	72.4	9.2	3.8	
Pacific Islands	45.8	87.5	8.3	9.0	
USA	27.9	95.3	4.7		
Canada	33.3	72.2	11.1	5.6	
UK	30.6	87.8	4.1		
France	51.6	83.9	3.2	12.9	
Other Europe	30.2	88.7	17.0	3.8	
Japan	28.6	90.5			
Other Asia	46.2	92.3			
Other countries	20.0	80.0			
Total	34.6	78.3	7.3	3.5	

*Table 22: Visitor by Type of Accommodation and Purpose of Visit (%)*

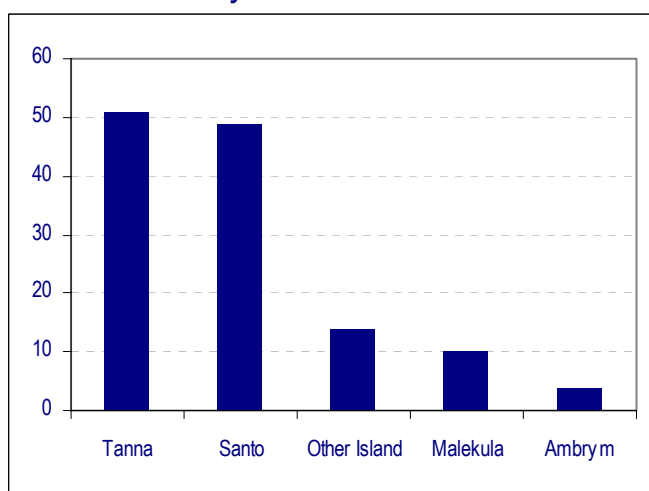
Accommodation	Holiday only	Business only	VFR	Other	Total
Hotel /Resort	91.2	84.4	36.7	78.5	87.7
Guest House	3.0	3.6	7.0	8.1	3.4
Apartment	2.3	4.5	3.9	3.7	2.6
Friends-Relatives	3.1	5.1	57.6	10.4	6.0
Other accomm.	3.2	4.0	4.8	14.1	3.6

Chart 6: Visitors by Type of Accommodation and Market area (%)



Friends and relatives accommodation though small in proportion, is the second choice for accommodation after hotels and resorts. According to this survey, guesthouse and Apartments were not too popular for visitor accommodation.

Chart 7: Visitor by Provincial Travel Distribution and Market Area



Half of the visitors who have been to outer islands in Vanuatu at least visited Tanna Island apart from Efate. Tanna has become more popular than it was in 1997. Despite Santo being the host to the second town, Tanna Island was mostly preferred by visitors. One of the main factors contributing to Tanna's popularity is that it has an active volcano and is one of the most accessible in the world.

Interestingly visitors visit other islands more than islands such as Malekula and Ambrym, which were used to be

dominant visitor destination excluding Tanna, and Santo. Epi Island alone made up of a quarter of the visitor visiting other islands. Penama province and Torba province as a group made up 18% and 14 % respectively of the Other island category. This has shown that visitor destination in other islands has extended to other islands

At least half of the visitors stayed between 4 – 7 nights in outer islands.

Chart 8: Distribution of nights spent by market area (%).

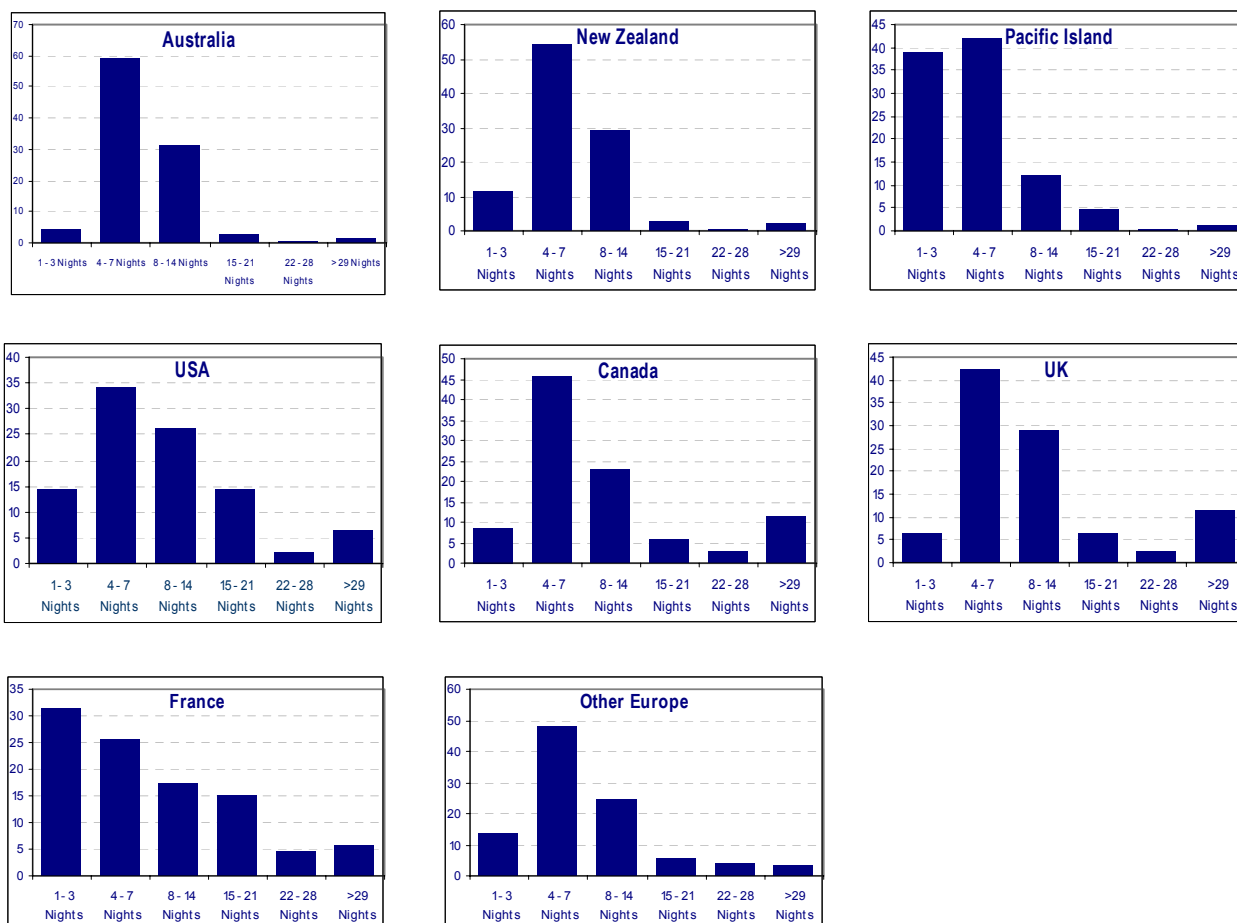




Table 23: Visitors average Length of Stay by Market area(%)

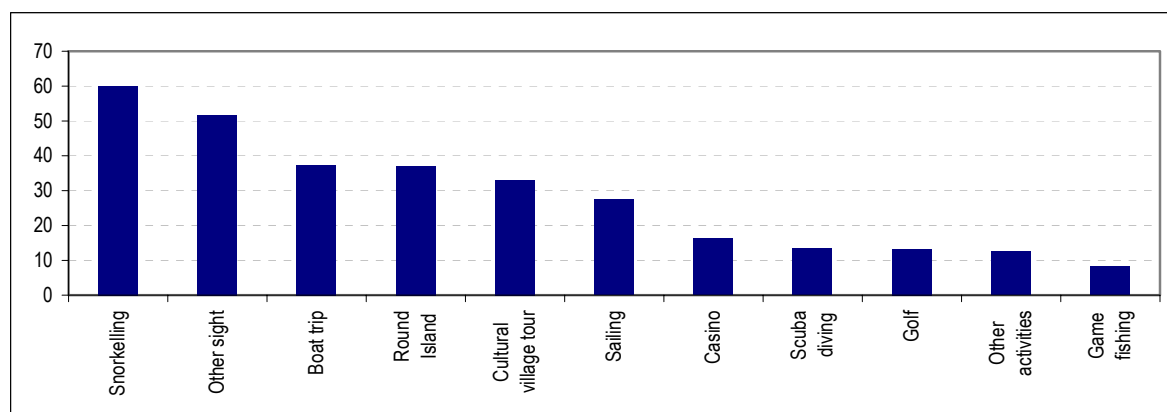
Market area	Average Length of Stay (nights)
Australia	8.0
Canada	14.0
France	10.0
Japan	8.8
New Zealand	8.0
Other Asia	10.8
Other Countries	13.6
Other Europe	9.6
Pacific Islands	5.9
UK	11.8
USA	11.9
Total	8.2

The average length of stay remains the same since the last survey at 8.2 nights. Countries within the Pacific including Australia and New Zealand stay shorter periods than those further away such as Asia, North America and Europe.

Three quarters of the visitors spend at least four nights but not more than two weeks.

Holidaymakers spend less time in country than the rest. Those visiting friend and relatives stay longer periods. These ones are more likely to stay at friends' residence for free.

Chart 9: Visitor by activities engaged in and purpose of visit (%)



Snorkelling topped the list of activities engaged by visitor while in Vanuatu. The crystal clear water is one factor contributing to this high proportion. Visitors from Pacific island countries found snorkelling not that interesting. Visitors least engaged in game fishing and Casino.

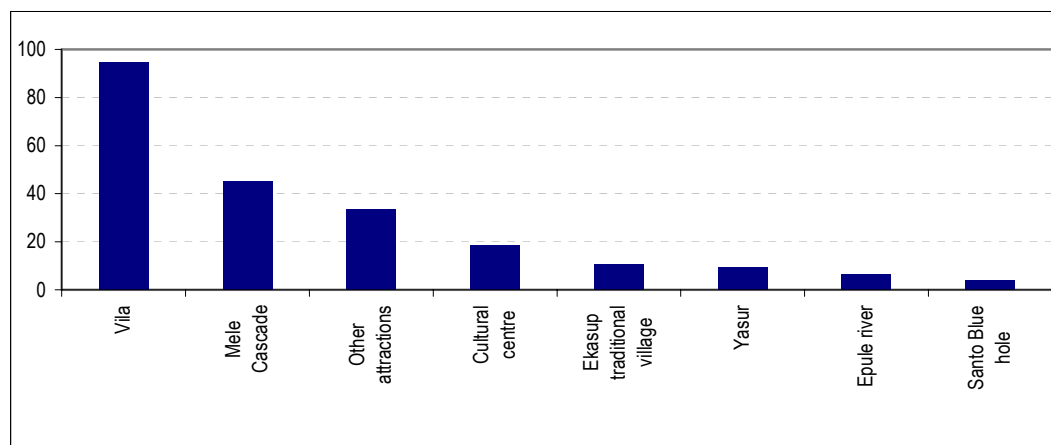
Boat trip and round island trip including sights seeing were the main activities apart from snorkelling for holidaymakers. One in four business visitors did snorkelling.

The capital town of Port Vila, as the main administrative centre and port of entry, was the main starting point for visitors and therefore dominated the list of attractions. Other highly popular activities were Mele Cascades, Cultural Centre and Ekasup which were more accessible than other sites. Almost half of the visitors visited the Mele cascades.

Holiday travellers favoured Vila (95.8%), Other (36.5%), Mele Cascades (49.3%), Cultural Centre (19.4%). By proportion, each of these sites has increased a lot compared to the

1997 survey. There is a specific mention of Hideaway Island resort and has dominated the Other attractions category.

Chart 10: Visitor by attractions and purpose of visit (%)



One quarter of the older visitors visited the Cultural Centre. By proportion, Mele Cascade was mostly dominated by visitors with ages between 20 and 29.

There is no difference in preference of attractions between male and female.

## CHAPTER SIX: VISITOR OPINIONS AND REACTIONS

### 6.1 Introduction

This chapter discusses the opinions and reactions of respondents to their visit of the destination.

In the previous chapters we examined the significant role marketing has to play in effective positioning of the product. In examining the reactions of the consumer with the product, we hope to gauge what patterns are prevalent against those which can be further enhanced to ensure the sustainable growth of arrivals and growth in expenditure in the destination.

Visitors were asked to indicate what activities enabled them to experience Vanuatu as they did.

### 6.2 Fulfilment of expectation

In this survey, the level of fulfilment for visitation to the destination was high. More than three quarters (88.0 %) indicated that they were definitely satisfied with their trip, just a slightly higher proportion from the 1997 survey figure (84.0%).

Less than a quarter (11.4%) responded that they were partially satisfied (1997, 15.0%) and only less than one percent was definitely not satisfied (1997, 1.0%). This has indicated that there are improvements since the last survey in the tourism industry to suit visitors' needs.

*Table 24: Fulfilment of expectation by market area (%)*

Fulfil expectation	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
Definitely	88.1	88.6	86.3	90.1	77.1	89.4	80.2	89.7	88.6	84.4	92.9	88.0
Partially	11.2	10.6	13.1	9.9	22.9	10.6	19.8	10.3	11.4	15.6	7.1	11.4
Definitely Not	0.6	0.7	0.5									0.6
Not stated	0.1	0.1										0.1
Total	100	100	100	100	100	100	100	100	100	100	100	100
Respondents	3,357	690	373	91	35	123	86	146	35	32	14	4,982

The table below reveals that the fulfilment of expectation by purpose indicated, holiday makers were definitely satisfied with their trip along with business others and VFR. The majority of those visitors partially satisfied were VRF other purpose business followed by holidaymakers. Less than a percent responded they were definitely not satisfied.

**Table 25: Fulfilment of expectation by purpose of visit (%)**

Fulfil expectation	Holiday only	Business only	VFR	Other	Total
Definitely	88.4	86.2	84.3	85.9	88.0
Partially	10.9	13.2	15.3	14.1	11.4
Definitely Not	0.6	0.6	0.4	-	0.6
Not stated	0.1	-	-	-	0.1
Total	100	100	100	100	100
Respondents	4,124	494	229	135	4,982

### 6.3 Repeat Visitors

Respondents were asked in this survey if they would consider returning to Vanuatu. At least three quarters (78.5%) of visitors to Vanuatu said they would definitely return to the destination. This response of potential visitors returning, echo the satisfaction of the respondents in the survey.

The respondents who replied that they would definitely return were not restricted to the main markets of Australia and New Zealand, but across the Pacific Islands to the European continent and Asia as well as USA and other countries. Of these respondents, the Pacific Islanders were highest amongst those who definitely would return to Vanuatu, Canadians (80%), New Zealanders (79.7%), Australians (79.2%) followed by visitors from other countries with slight percentage variation ranging from 75.8 - 64.3 percentages

At least 13 percent of respondents were uncertain. Less than 9 percent were undecided about visiting the destination again.

**Table 26: Return to Vanuatu by Market area (%)**

Return to Vanuatu	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
Definitely	79.2	79.7	81.5	75.8	80.0	71.5	73.3	66.4	68.6	65.6	64.3	78.5
Probably	13.6	13.2	8.8	13.2	11.4	16.3	5.8	19.2	17.1	18.8	14.3	13.3
Not sure	4.7	5.5	2.7	7.7	-	8.9	8.1	12.3	8.6	12.5	14.3	5.2
Probably not	1.7	1.3	1.9	2.2	8.6	2.4	7.0	0.7	-	3.1	-	1.8
Definitely not	0.4	0.1	0.8	-	-	0.8	-	0.7	-	-	-	0.4
Not stated	0.3	0.1	4.3	1.1	-	-	5.8	0.7	5.7	-	7.1	0.8
Total	100	100	100	100	100	100	100	100	100	100	100	100
Resp.	3,357	690	373	91	35	23	86	46	35	2	14	4,982

## 6.4 Return Visitors by Purpose of Visit

*Table 27: Return to Vanuatu by purpose of visit (%)*

Return to Vanuatu	Holiday only	Business only	VFR	Other	Total
Definitely	77.5	82.6	88.2	76.3	78.5
Probably	13.8	13.4	6.6	11.9	13.3
Not sure	5.6	2.4	3.5	5.9	5.2
Probably not	2.0	0.4	0.9	3.0	1.8
Definitely not	0.4	0.2		0.7	0.4
Not stated	0.7	1.0	0.9	2.2	0.8
Total	100	100	100	100	100
Respondents	4,124	494	229	135	4,982

Out of the 4982 respondents who replied they would definitely return, at least three quarters from each purpose of visit group said they would do so indicating that repeat visitors were not restricted to business and holiday travellers only.

*Table 28: Recommend Vanuatu by purpose of visit (%)*

Recommend Vanuatu	Holiday only	Business only	VFR	Other	Total
Definitely	84.5	82.2	88.2	80.0	84.3
Probably	11.6	13.8	9.2	14.8	11.8
Not sure	2.2	2.6	2.2	1.5	2.2
Probably not	0.6	0.6	0.4	0.7	0.6
Definitely not	0.4	0.2		0.7	0.4
Not stated	0.7	0.6		2.2	0.7
Total	100	100	100	100	100
Respondents	4,124	494	229	135	4,982

Respondents were asked to indicate if they would recommend Vanuatu to other potential travellers. Eight out of ten of the visitors from each purpose of visit group say they would definitely recommend Vanuatu to potential visitors.

## 6.5 Recommendation to potential visitors Vanuatu

More than three quarters, (84.3%) said they would recommend Vanuatu to other potential travellers. Although the main source markets made up the majority of these numbers, the responses were not restricted to these two markets.

*Table 29: Recommend Vanuatu by market area (%)*

Recommend Vanuatu	Aust	NZ	Pac	USA	Can	UK	Fran	Oth. Euro	Jap	Oth. Asia	Oth count.	Total
Definitely	84.9	84.3	85.8	85.7	82.9	79.7	74.4	77.4	74.3	75.0	100.0	84.3
Probably	11.5	11.4	10.2	13.2	11.4	17.1	17.4	15.1	14.3	18.8		11.8
Not sure	2.1	2.9	0.5		2.9	0.8	4.7	5.5	5.7	6.3		2.2
Probably not	0.6	0.6	0.8			0.8	2.3					0.6
Definitely not	0.4	0.1	0.5					0.7				0.4
Not stated	0.4	0.6	2.1	1.1	2.9	1.6	1.2	1.4	5.7			0.7
Total	100	100	100	100	100	100	100	100	100	100	100	100
Respondents	3,357	690	373	91	35	123	86	146	35	32	14	4,982



## CHAPTER SEVEN: VISITOR EXPENDITURE

### 7.1 Introduction

The objective of this section was to obtain information on the level of visitor expenditure in the destination. Respondents were asked several questions on what they spent their money on during their visit to Vanuatu. The information has been obtained from the respondents and therefore representative of the range in the sample only.

The question tried to differentiate between three aspects:

- a) prepaid package tours
- b) any advance payments
- c) expenditure incurred during the stay in Vanuatu.

The data on expenditure supplied by the respondents was not always transparent due to limitations in the amounts recollected. Often respondents did not always know the costs of airfares say if they were part of a package, which meant that the total costs and expenditure were not always clear. In some cases the expenditure say for example in the accommodation may have also been under estimated. This has an effect on some of the tables presented because prepaid packaged travellers did not always verify costs of accommodation and meals where others could.

Visitors' expenditures were provided in different currencies. For analysis and standardisation purposes, all currencies were converted into Vatu using exchange rates provided by the Reserve Bank of Vanuatu

### 7.2 Expenditure distribution

The following table is a summary of this survey to the previous two in terms of averages per head and per day. This indicator can be use as a base to estimate the income generated especially from visitors.

*Table 30: Summary findings for the three surveys*

	1991	1997	2004
Sample size	2,197	1,430	4,982
Average Length of stay (nights)	7.8	8.2	8.2
Annual Visitors	49,056	49,624	61,453
Av exp/person/day(Vt)	9,085	16,400	19,654

Since 1997, the average daily expenditure has increased by 16.6%. Annual tourist arrivals increased by 19.2% over the same period

### 7.3 Expenditure summary by nationality

*Table 31: Visitors average expenditure per head by market area*

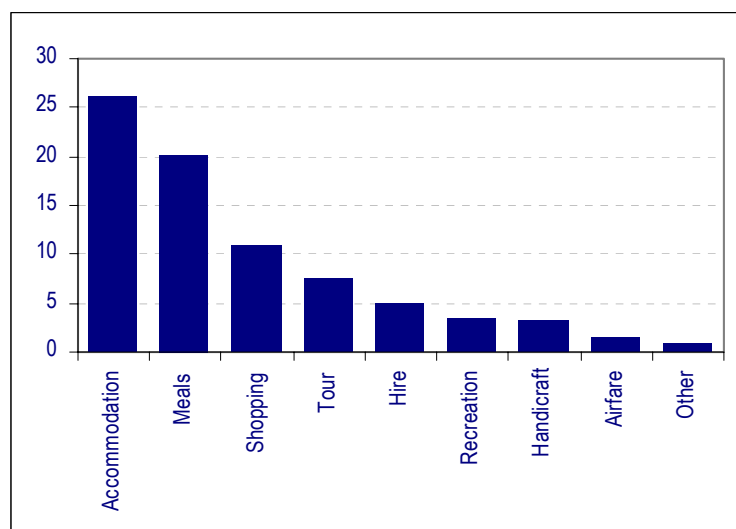
Country	2004 visitors	Av. Length of stay (nights)	Average Exp/head/day (Vt)
Australia	36,407	8.0	21,348
Europe	3,388	10.4	13,749
Asia	591	8.8	9,790
NZ	8,220	8.0	22,697
N.America	1,954	12.3	14,139
Pacific	9,809	8.4	19,885
Oth. Count	1,084	11.7	15,761
Total	61,453	8.2	19,654

*Table 32: Visitors average expenditure per head by Purpose of visit*

Purpose of visit	2004 visitors	Av. Length of stay (nights)	Average Exp/head/day (Vt)
Holiday	47,516	7.8	20,261
Business	7,741	8.6	20,694
VFR	4,662	12.3	12,942
Others	1,534	10.7	18,927
Total	61,453	8.2	19,654

Expenditure per head is associated with the length of stay although those staying less than a week spend more. This is because packaged tours often have that duration.

Prepaid package visitors made up of almost three quarters of all visitors. When looking at the average expenditure per head, those not travelling on prepaid package spend a lot more than package visitors. They will be flexible with the duration of staying in the country therefore stay longer period than package visitor.



At least three quarters (84%) of expenditure is spent by visitors who came for on holiday. Two thirds (68%) of other Asian visitors spend two thirds of their expenditure on business only

*Chart 11: Distribution of itemised expenditure (%)*

At least one quarter of the expenditure is spent on accommodation. Meals and

accommodation alone account for almost half of the local expenditure

In comparison with past surveys, the proportion of itemised expenditure changed very little with accommodation still dominating the expenditures. Accommodation still account for at least a quarter of total visitor expenditure.

*Table 33: Comparison of itemise expenditure for the past surveys 1991 – 1997 (%)*

Itemised expenditure	1991	1997	2004*
Accommodation	55	26.4	26.2
Meals & drinks	16	25.7	20.2
Tours and excursions	4	8.4	7.6
Internal transport and taxis	4	9.1	6.4
Shopping	10	18.5	10.9
Entertainment	2	3	3.4
Handicraft	3	2.3	3.2
Others	3	6.6	0.8

\* This refers to internal expenditure only

When looking at the overall expenditure surveyed, two thirds (64.5%) of visitor expenditure for the whole travelling is spent outside Vanuatu.

## CHAPTER EIGHT: TOURISTS COMMENTS AND SUGGESTIONS

**Table 34: Rating of product component (%)**

Product component	Average rating	% response
Accommodation	4.3	96.6
Restaurants Rating	4.2	95.7
Taxis/ Hired cars	4.0	83.7
Tours Excursions	4.3	66.7
Sailing Facilities	4.2	35.7
Beaches Rating	4.2	77.8
Handicraft	4.2	68.6

While accommodation is rated highly, slightly more people thought it is good rather than excellent. This is similar to other product ratings where the excellent rating was second to the Good rating. Out of all products mentioned, taxis or hired cars got the lowest rating.

**Table 35: Rating of value for money**

Value for money	Average rating	% Response
Overall Costs	4.0	97.4
Accommodation	4.0	94.5
Meals Drinks	3.7	97.4
Trips Excursions	4.0	73.7
Local Transport	4.1	90.0
Other value	3.9	1.6

Half of the visitors thought the overall cost of their trip is Good rather than excellent and likewise for other value ratings

**Table 36: Fulfilment of expectation by market area (%)**

Market area	Not stated	Definitely	Partially	Definitely Not
Australia	0.1	88.1	11.2	0.6
New Zealand	0.1	88.6	10.6	0.7
Pacific Islands		86.3	13.1	0.5
USA		90.1	9.9	
Canada		77.1	22.9	
UK		89.4	10.6	
France		80.2	19.8	
Other Europe		89.7	10.3	
Japan		88.6	11.4	
Other Asia		84.4	15.6	
Other countries		92.9	7.1	
Total	0.1	88.0	11.4	0.6

About one in eight visitor stated that their expectations were fulfilled while the rest partially think so and less than one percent thought otherwise.

Respondents were asked this additional question so they may describe what they particularly disliked and liked while visiting Vanuatu. The following section discusses some of these responses, which have been put in the categories outlined. The purpose of the questions was to ascertain specific opinions pertaining to the actual perceptions on the

product of Vanuatu. The most critical point is to look at how these comments can be constructively used to improve visitation to the destination in the future. Some of the comments may have been a repeat of the some of the things mentioned in some of the sections but this may be as an emphasis on the importance of the issue. The majority of respondents replied with a variety of responses. The comments (likes and dislikes) were categorised into the following items.

- People
- Facilities
- Infrastructure
- Environment and
- Others

The following table outlines some of the common responses resulting from this inquiry on likes and dislikes.

*Table 37: Visitors comments on what they like*

Like	Percent	Comments
<b>People</b>	<b>73</b>	<ul style="list-style-type: none"> <li>○ Friendly people</li> </ul>
<b>Environment</b>	<b>52</b>	<ul style="list-style-type: none"> <li>○ Beautiful</li> <li>○ Culture and life style</li> <li>○ Atmosphere</li> <li>○ Beaches</li> <li>○ Climate</li> <li>○ Weather</li> <li>○ Crystal waters</li> <li>○ Nature</li> <li>○ Islands</li> <li>○ Country</li> </ul>
<b>Tours</b>	<b>26</b>	<ul style="list-style-type: none"> <li>○ Snorkelling</li> <li>○ Cascades</li> <li>○ Tours</li> <li>○ Volcanoes</li> <li>○ Fishing</li> </ul>
<b>Facilities</b>	<b>15</b>	<ul style="list-style-type: none"> <li>○ Restaurants (Food and drinks)</li> <li>○ Shopping</li> <li>○ Hideaway</li> <li>○ Hotels</li> <li>○ Service</li> </ul>
<b>Other</b>	<b>8</b>	<ul style="list-style-type: none"> <li>○ Everything</li> <li>○ Safety</li> <li>○ Others</li> </ul>
<b>Infrastructure</b>	<b>8</b>	<ul style="list-style-type: none"> <li>○ Transport system (buses)</li> <li>○ Food market variety</li> </ul>

Comments were made on more than one issue. Ninety six percent of the visitors surveyed give comments on what they like about Vanuatu. Three quarters say they like the friendliness of the people

On the other hand, visitors commented on what they think otherwise of Vanuatu.



Table 38: Visitors comments on what they dislike

Dislike	Percentage	Comments
<b>Facilities</b>	<b>35</b>	<ul style="list-style-type: none"> <li>○ Food and restaurants</li> <li>○ Hotel and resort facilities</li> <li>○ Shop conditions, quality of products sold</li> <li>○ Airline service</li> </ul>
<b>Cost of living</b>	<b>26</b>	<ul style="list-style-type: none"> <li>○ Expensive (food, accommodation, transport)</li> </ul>
<b>Environment</b>	<b>25</b>	<ul style="list-style-type: none"> <li>○ Rainy weather, hot and humid</li> <li>○ Littering in town</li> <li>○ Dust everywhere</li> <li>○ Beach condition</li> <li>○ Insects (mosquitoes, flies etc)</li> </ul>
<b>Infrastructure</b>	<b>23</b>	<ul style="list-style-type: none"> <li>○ Road condition (potholes)</li> <li>○ Lack of pavement</li> <li>○ Transport condition (old, fumes from exhaust)</li> <li>○ No proper drainage system</li> <li>○ Dishonest taxi drivers (overcharging)</li> <li>○ Lack of air condition in some places</li> <li>○ Insufficient and unhygienic public toilets</li> <li>○ Insufficient signs for direction</li> </ul>
<b>Other</b>	<b>15</b>	<ul style="list-style-type: none"> <li>○ Others (stealing, safety etc)</li> <li>○ Slow service</li> <li>○ Communication</li> <li>○ Short duration</li> <li>○ Noise (dogs, music)</li> <li>○ Medical facilities</li> <li>○ Customer services</li> <li>○ Airport service (air condition, no ATM, Immigration too slow)</li> <li>○ Not enough entertainment (night life, movies)</li> </ul>
<b>Tours</b>	<b>2</b>	<ul style="list-style-type: none"> <li>○ Tour operators</li> <li>○ Customer service</li> </ul>
<b>People</b>	<b>2</b>	<ul style="list-style-type: none"> <li>○ Standard of living</li> <li>○ Foreign influence</li> </ul>

Forty-four percent (44%) commented on what they dislike about Vanuatu. At least one third commented on the visitor facilities. One quarter of the respondents thought that overall, Vanuatu is an expensive place.

## **Appendix: The Survey Questionnaire**

# 2004 VANUATU VISITOR SURVEY QUESTIONNAIRE



We hope that your stay in Vanuatu was a pleasant and rewarding experience. Before you leave, we would like you to complete this questionnaire as accurately as you can. The Survey Officers will assist you where necessary. The information you provide will assist us to better plan and make appropriate decisions in the development of our Tourism Industry.

**ONLY ONE PERSON FROM EACH FAMILY OR SPENDING PARTY SHOULD ANSWER THE QUESTIONNAIRE.**

*This Survey is being carried out by the Vanuatu Government in collaboration with the Vanuatu National Statistics Office, Vanuatu Tourism Office, Reserve Bank of Vanuatu and South Pacific Tourism Organization and funded by the NZ AID.*

**WE DO NOT REQUIRE YOUR NAME!**

ENUMERATOR: \_\_\_\_\_

FLIGHT NUMBER: \_\_\_\_\_

DATE: \_\_\_\_\_ TIME: \_\_\_\_\_

\_\_\_\_\_

SIGNATURE: \_\_\_\_\_



## Visitors Profile/Travelling characteristics

### 1. WHAT NATIONALITY ARE YOU? (Please tick (✓) appropriate box)

Countries	State/Province or county:	
Australia		1
New Zealand		2
United States of America		3
Canada		4
United Kingdom		5
France		6
Netherlands		7
Belgium		8
Denmark		9
Spain		10
Italy		11
Japan		12
Other Europe	Country:	13
Other Asia	Country:	14
Pacific:	Country:	15
Other	Country:	16

### 2. IN WHICH AGE GROUP ARE YOU?

Tick box (✓)	Age Group	Male	Female
1	Under 20 Years		
2	20 –29 Years		
3	30 –39 Years		
4	40 –49 Years		
5	50 –64 Years		
6	OVER 64 Yrs		

### 3. IS THIS YOUR FIRST VISIT TO THE SOUTH PACIFIC?

First Visit	1
Visited Before	2
No. Of visits before :	

**4. A) IS THIS YOUR FIRST VISIT TO VANUATU?**

First Visit		1
Visited Before		2
No. Of visits before :		

*If first visit skip to question 5*

**B) WERE ANY OF THE PREVIOUS VISITS ON A CRUISESHIP?**

Yes		1	NO		2
Continue			Skip to 5		

**HOW MANY VISITS?**

**5. HOW FAR IN ADVANCE DID YOU PLAN THIS TRIP?** (Please tick (✓) appropriate box only)

Less Than One Week		1
1-2 Weeks		2
2 Weeks to 1 Month		3
1 – 3 Months		4
3 Months to 6 months		5
6 months to a year		6
More than a year		7

**6. ON WHICH AIRLINE DID YOU ARRIVE?**  
(Please tick (✓) appropriate box only)

Air Vanuatu		1
Air Pacific		2
Air Caledonie		3
Solomon Airlines		4
Virgin Blue		5
Other (Specify):		6

**7. DOES THIS TRIP INCLUDE VISITS TO OTHER COUNTRIES BEFORE COMING TO VANUATU?**

Yes		1	NO		2
Continue			Skip to 8		

LIST THE **LAST FOUR** COUNTRIES VISITED ON THIS TRIP ?

1	
2	
3	
4	

**8. WHAT WAS THE MAIN PURPOSE OF YOUR VISIT TO VANUATU?**  
(Please tick (✓) appropriate box)

Holiday Only		1
Business Only		2
Visit Friends/Relatives		3
Other:		4

**9. A) WITH WHOM DID YOU TRAVEL?** (Tick (✓) Appropriate box only)

Alone		1
Spouse/Partner Only		2
Family		3
Group/Friends		4
Other:		5

*If 'Alone' or 1 skip to Question 10.*

**B) IF TRAVELLING WITH OTHERS, HOW MANY OTHER PEOPLE TRAVELLING WITH YOU, THIS FORM REPRESENTS:**

Tick	Description	Number
	No. of ADULTS (18+) excluding own children	
	Spouse/Partner	
	No. of children 18+	
	No. of children below 18 yrs	

**Visitors Expenditure**

**10. DID YOU TRAVEL ON A PRE-PAID PACKAGE?**

Yes		1	NO		2
Continue			Skip to 12		

**11(A) IF YOU CAME ON A PRE-PAID PACKAGE?**

What is the name of Tour Operator/Wholesaler?:

---

---

Where is the Tour Operator/Wholesaler located?  
\_\_\_\_\_  
\_\_\_\_\_

Total Cost of the Package :	Amount	
	Currency	

11(B) WHAT DID THE PACKAGE  
INCLUDE (Tick (✓) all boxes which apply)

Air Ticket		1
Accommodation		2
With Meals Only		3
Tours/Cruises		4
Transfers		5
Other		6

12. OTHER THAN THE EXPENSES LISTED IN THE ADVANCE PAYMENTS,  
DID YOU MAKE ANY OTHER PAYMENTS BEFORE COMING TO  
VANUATU?

Yes		1	NO		2
Continue			Skip to 13		

For What Purpose:	Accommodation		1
	Airline		2
	Tours		3
	Car Hire		4
	Other		5

How Much	
Currency	

13. HOW MANY NIGHTS DID YOU SPEND IN VANUATU?

14. HOW MUCH DID YOU SPEND ON:

ITEMS	AMOUNT	CURRENCY
Accommodation (Including meals & drinks at hotel)		
Other meals & Drinks (Other than in the hotel)		
Taxi/Car Rentals		
Tours		
Entertainment/Recreation (water sports, diving, etc...)		
Handicrafts		
Shopping (Including duty Free Shopping)		
Airfare (Domestic only)		
All Other (Including departure tax)		

15. WHAT WAS YOUR TOTAL EXPENDITURE WHILE YOU WERE IN  
VANUATU? (EXCLUDE the amounts covered in Question 11 and 12)

Amount	
Currency	

16. HOW MANY PERSONS DOES THIS EXPENDITURE COVER?

17. TO WHAT EXTENT DID YOU USE THE FOLLOWING TO MAKE YOUR  
PAYMENTS? (Please tick (✓) appropriate boxes)

Items	WIDELY used 1	SOMETIMES Used 2	NOT Used 3	DON'T Have 4
Cash/Travellers Cheques				
Credit cards				
Other (Specify below)				

**18. DID YOU VISIT ANY OUTER ISLAND (S) DURING YOUR STAY?**

Yes		1	NO		2
Continue			Skip to 20		

**19. A) WHICH OUTER ISLAND DID YOU VISIT DURING YOUR STAY?**

*Please tick (✓) appropriate box only*

ISLAND		3 MAIN PLACES VISITED	TOTAL NIGHTS SPENT
1	Santo	1. _____ 2. _____ 3. _____	
2	Tanna	1. _____ 2. _____ 3. _____	
3	Malekula	1. _____ 2. _____ 3. _____	
4	Ambrym	1. _____ 2. _____ 3. _____	
5	Others (specify):	1. _____ 2. _____ 3. _____	

**B) LIST THE MAIN ACTIVITIES UNDERTAKEN ON THE OUTER ISLANDS:**

Walking/Trekking		1	Fishing		5
Diving		2	Snorkelling		6
Volcano watching		3	Cultural activities		7
Kava drinking		4	Others (Please Specify)		8

**20. WHICH OF THE FOLLOWING PLACES OF INTEREST DID YOU VISIT DURING YOUR STAY? (Tick (✓) appropriate boxes)**

Vila Town		1
Yasur Volcano		2
Vanuatu Cultural Centre		3
Ekasup Traditional Village		4
Ebule River		5
Mele Cascades		6
Santo Blue Hole		7
Others:		8

**21. TYPE OF ACCOMODATION (Tick (✓) all boxes which apply)**

Hotel/Resort		1
Guest House		2
Apartment		3
Friend/Relatives		4
Other:		5



### Visitors Opinion

**22. HOW IMPORTANT WERE THE FOLLOWING SOURCES OF INFORMATION IN MAKING YOUR DECISION TO VISIT VANUATU.** *(Place a tick (✓) in each box) If not relevant, leave it blank.*

Information Source	VERY Important 1	Important 2	SOME Importance 3	NOT SO Important 4	NOT Important 5
Travel Agent/whole saler					
Airline					
Travel Guide books					
Newspaper					
Magazine					
Television Ad					
Internet					
Travel Show					
Friends/Relatives					
Business					
Other (Specify below):					

**23. A) PLEASE LIST THE THREE MAIN MAGAZINES/ NEWS PAPER OR TOURIST GUIDE BOOKS ON VANUATU TOURIST PROMOTION REGULARLY READ BY YOU AND YOU'RE FAMILY.**

	Magazine		Newspaper		Travel Guide Books
1		1		1	
2		2		2	

3		3		3	
---	--	---	--	---	--

**B) WHAT ARE THE THREE MAIN WEBSITES USED BY YOU AND YOUR FAMILY TO OBTAIN TRAVEL INFORMATION.**

Websites	
1	
2	
3	

**24. HOW IMPORTANT WERE THE FOLLOWING FACTORS IN MAKING YOUR DECISION TO VISIT VANUATU?**

Factors	VERY Important	Important	SOME Important	NOT SO Important	NOT Important
Climate					
Beaches					
Culture/Heritage					
Diving					
Friendly People					
Accessibility					
Restaurants					
Visiting Friends/Relatives					
Short travel time to destination					
Other (Specify)					

25. WHICH OF THE FOLLOWING ACTIVITIES DID YOU ENGAGE IN DURING YOUR VISIT? (Tick (✓) appropriate boxes)

Scuba Diving		1
Snorkelling		2
Sailing		3
Game Fishing		4
Round Island Tour		5
Boat Trips		6
Other Sight Seeing		7
Cultural Village Tours		8
Golf		9
Casino		10
Other (Specify)		11

26. HOW WOULD YOU RATE THE FOLLOWING ASPECTS OF YOUR STAY HERE IN VANUATU? (Place a tick (✓) where appropriate)

ACCESS	Excellent 1	Good 2	Average 3	Poor 4	Very Poor 5
Airline Service					
Immigration					
Customs					
Baggage Handling					
Airport Transfer					

PRODUCTS & SERVICES	Excellent 1	Good 2	Average 3	Poor 4	Very Poor 5
Accommodation					
Restaurants					
Taxis/Hired Cars					
Tours/Excursions					
Sailing Facilities					
Beaches					
Handicraft					

ACTIVITIES	Excellent 1	Good 2	Average 3	Poor 4	Very Poor 5
Shopping					
Yachting/Boat Trips					
Cruising					
Cultural Activities					
Sight Seeing					
Scuba Diving					
Game Fishing					
Golf					
Other (Specify below)					

27. HOW WOULD YOU RATE VALUE FOR MONEY PAID FOR THE FOLLOWING? (Place a tick (✓) in each box)

VALUE FOR MONEY	Excellent	Good	Average	Poor	Very Poor
	1	2	3	4	5
Overall Cost of Visit					
Accommodation					
Meals & Drinks					
Trips/Excursions					
Local Transport					
Other (Specify below)					

28. DID YOUR VISIT FULFIL YOUR EXPECTATIONS? (Please tick (✓) appropriate box)

Definitely		1
Partially		2
Definitely NOT		3

29. WOULD YOU RETURN OR RECOMMEND VANUATU TO FRIENDS OR RELATIVES? (Please tick (✓) appropriate box)

	Definitely	Probably	Not Sure	Probably Not	Definitely Not
	1	2	3	4	5
Return Yourself					
Recommend To Friends/Relatives					

30. PLEASE INDICATE BELOW ANYTHING YOU

(a) Particularly Liked

(b) Disliked About Your Visit to Vanuatu:

31. DO YOU WISH TO BE SENT FURTHER INFORMATION ON EVENTS AND WHAT IS HAPPENING IN VANUATU?

Yes		1	NO		2
Continue			End of interview		

Please indicate areas of interest for future holidays:

Outer Islands Holiday		1
Resort Based Holidays		2
Diving		3
Yachting/Cruising		4
Game Fishing		5
Others (Specify)		6

Your Contact Address:

THANKYOU VERY MUCH FOR YOUR CO-OPERATION!!  
WE WISH YOU A PLEASANT AND SAFE TRIP!