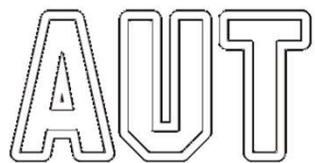


Vanuatu International Visitor Survey

Jan - Dec 2016



Summary of the Key Findings

Total Direct Economic Impact for 2016

US\$145 Million (Vt 15.8 billion) flowing back to Vanuatu Economy
US\$ 1,526 (Vt 166,537) per visitor per Trip; 95,117 visitors in all
US\$169 (Vt 18,443) per visitor per day

Respondent Profile and Characteristics

- 78% from Aus/NZ
- 87% under 50 years
- 55% female
- 70% household income less than \$100,000

Decision Making

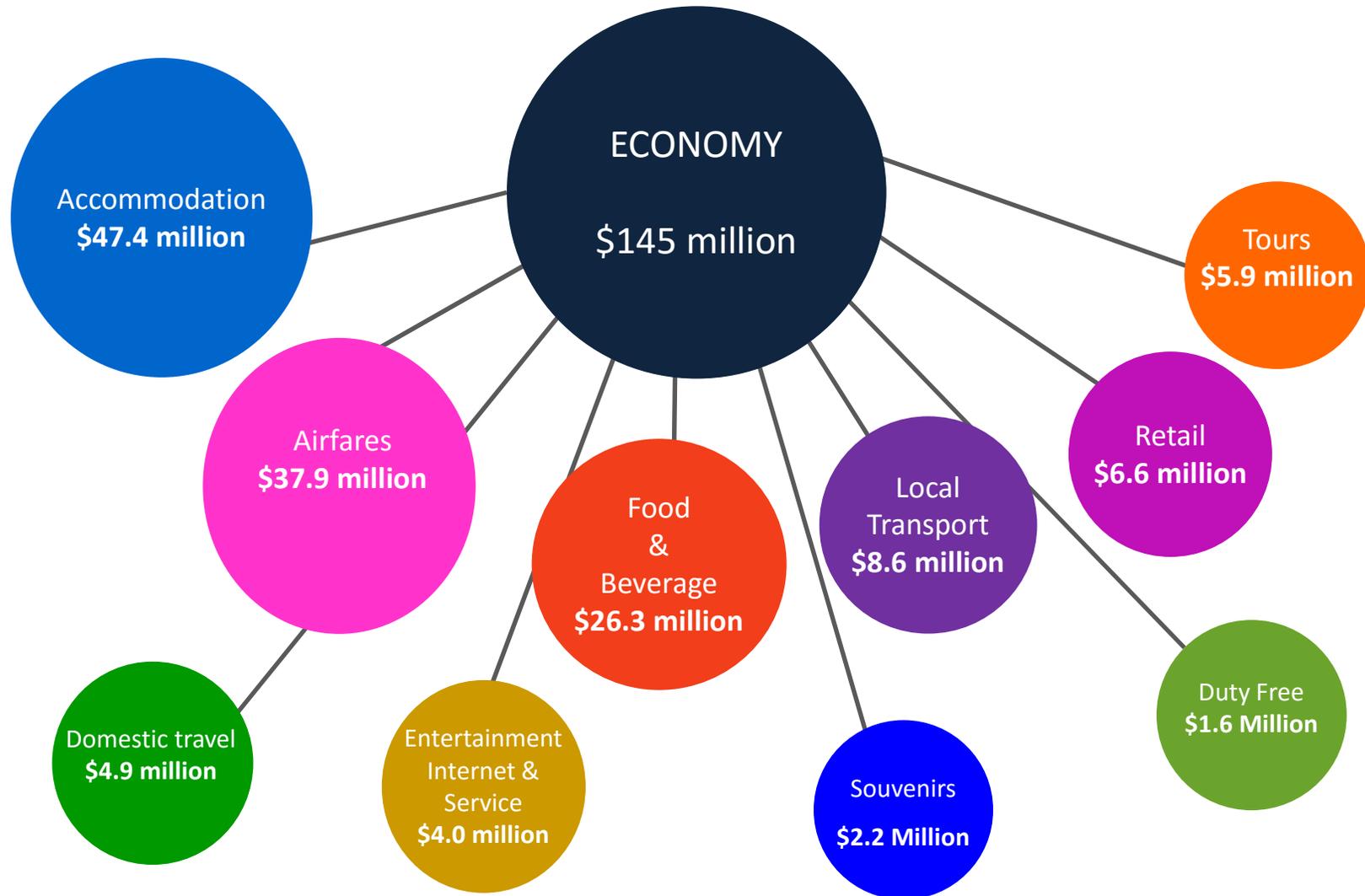
- General travel websites, friends and family and previous visits are key sources for planning holidays
- 54% purchased by themselves

Satisfaction

- 82% would come back
- Satisfied with environment, activities and attractions, and local people
- Public service and facilities and prices of goods and services least appealing

Direct Economic impact for Jan-Dec 2016

Pre-Arrival and in Country Spend



Presentation Structure



Respondents (Jan-Dec 2016)

Total number of e-mails sent: **34,602**



Conversion
rate of
15%

Total number of responses: **5,026**



Responses cover a total of
8,591 adults and **1,548** children



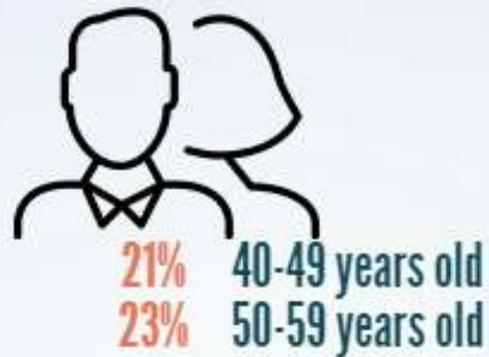
11% of all
visitors during
the period

Visitor Characteristics

People Covered



Age



Gender



Household Income



Country of Origin

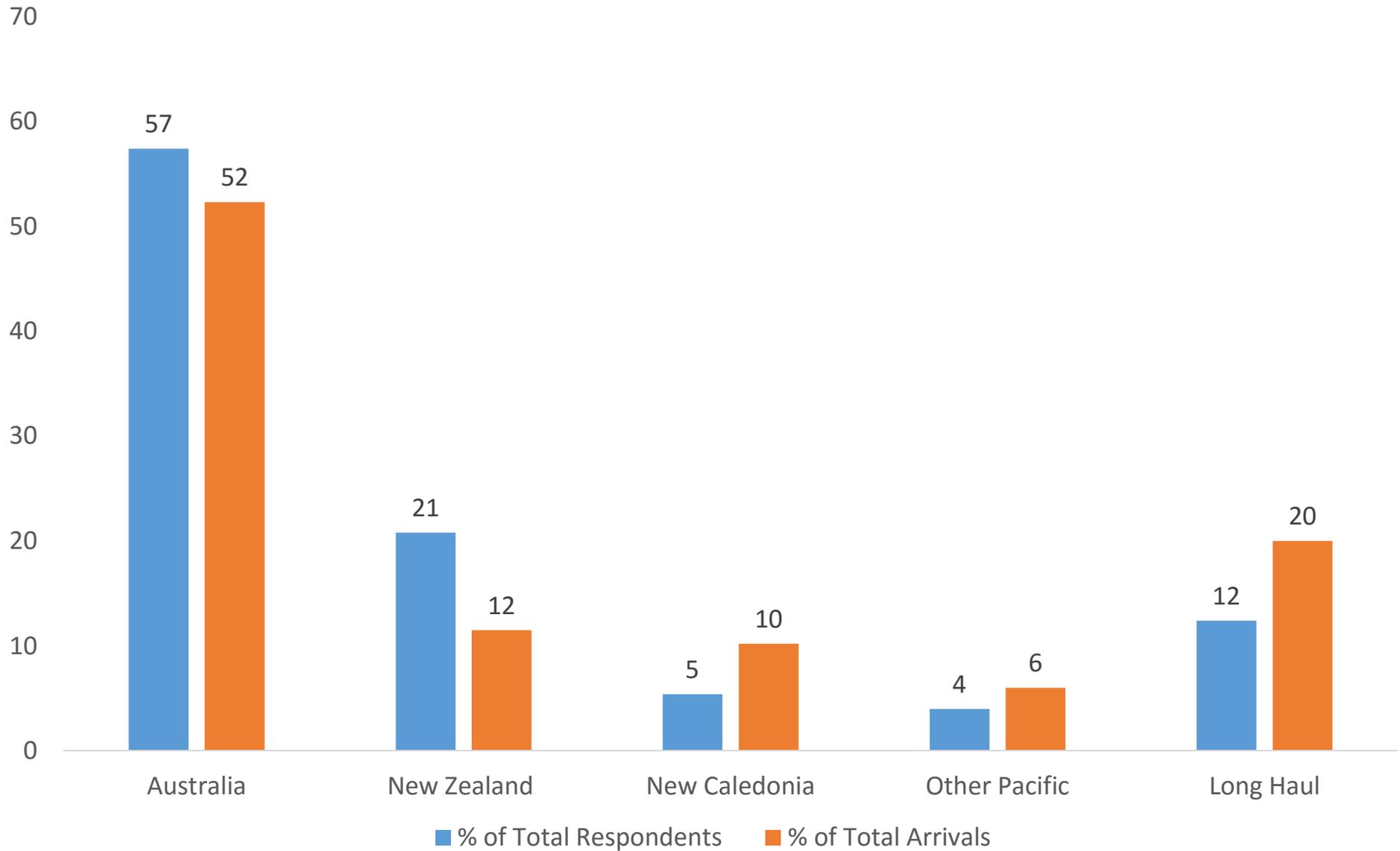


Long Haul market



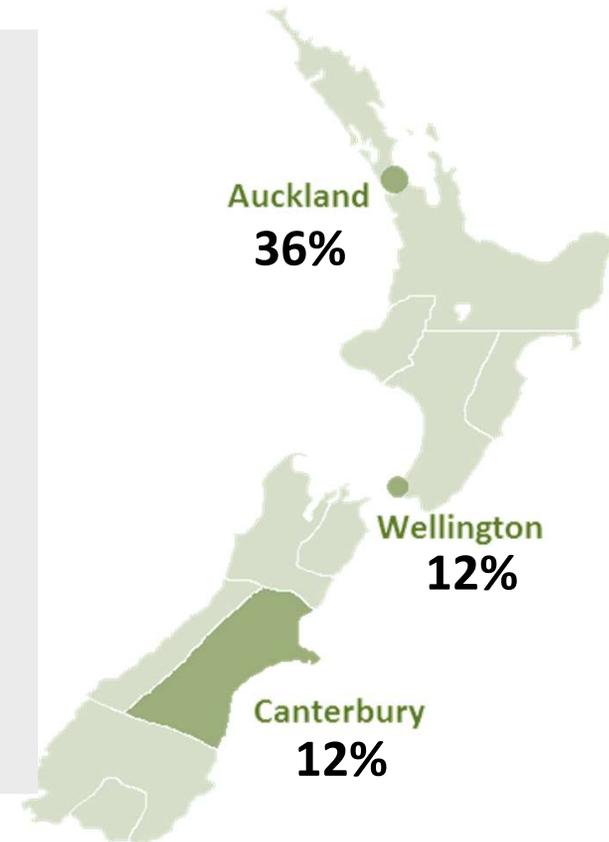
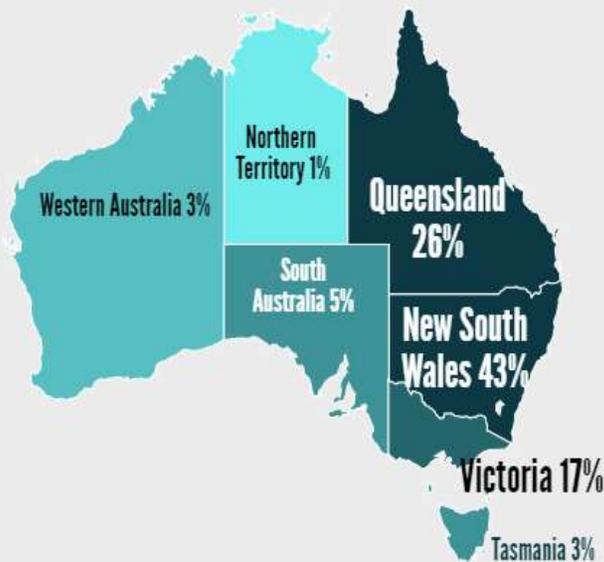
Country of Origin

Methodology &
Respondent Profile



Australian & NZ Respondents

Methodology &
Respondent Profile

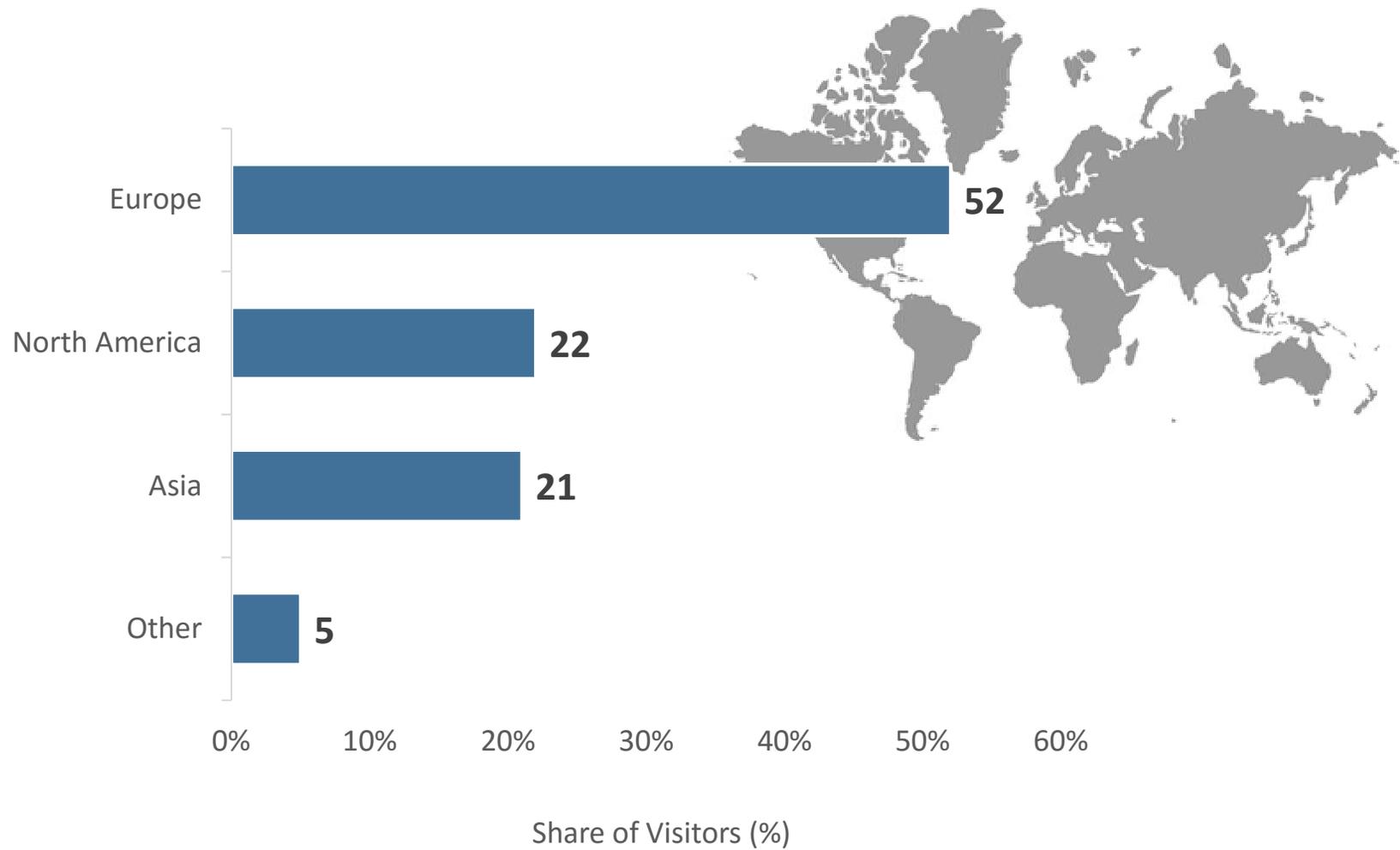


New South Wales, Queensland, and Victoria contribute **86%** of all Australian visitor arrivals

Auckland, Wellington, and Canterbury contribute **60%** of all NZ visitor arrivals

Long Haul Market

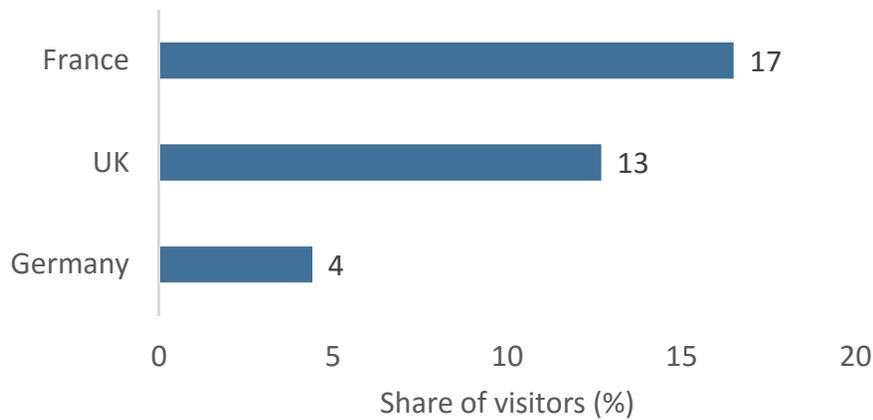
Methodology &
Respondent Profile



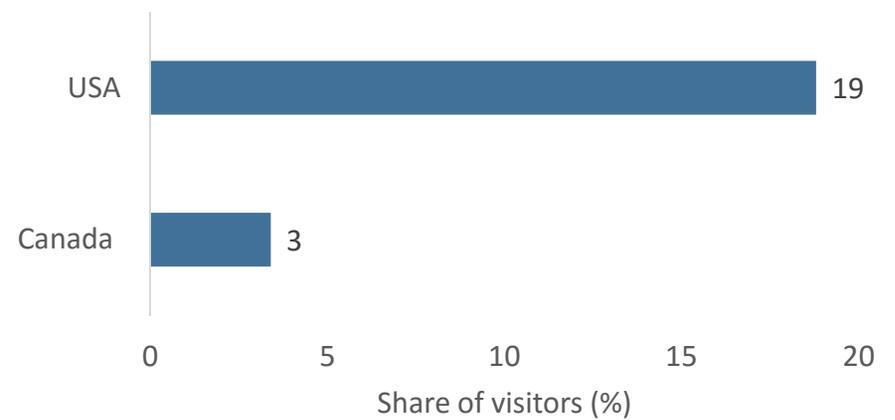
Long Haul Market – Top Countries

Methodology &
Respondent Profile

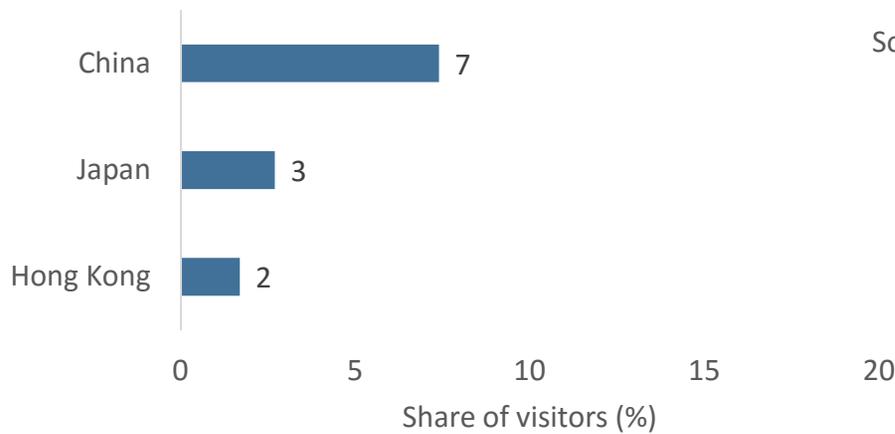
Europe



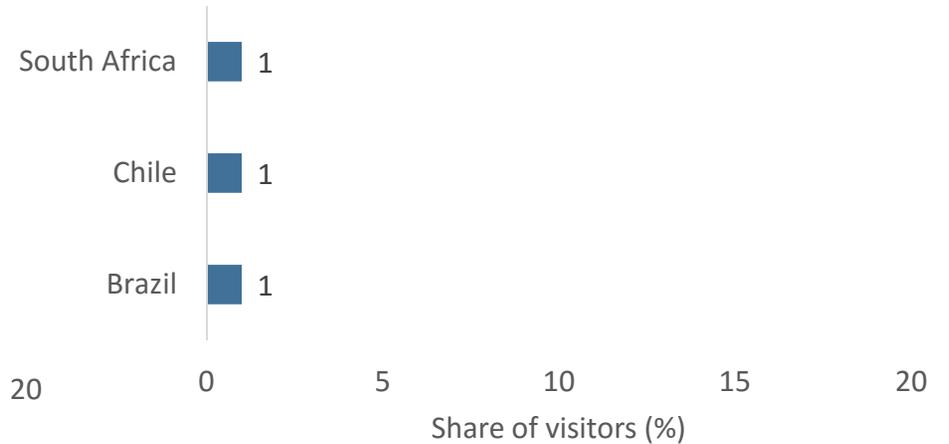
North America



Asia



Other



Presentation Structure



Visitor Characteristics – Summary

Airlines Used



63% Air Vanuatu
25% Virgin Australia
8% Fiji Airways

Travel Companions



37% One Companion
14% Solo

Purpose of Visit



68% Holiday
11% Business/Conference
8% Visits Friends/Family

Length of Stay



9.0 nights on average
57% stay up to 1 week

Previous Visits



58% First trip
23% 1 or 2 times

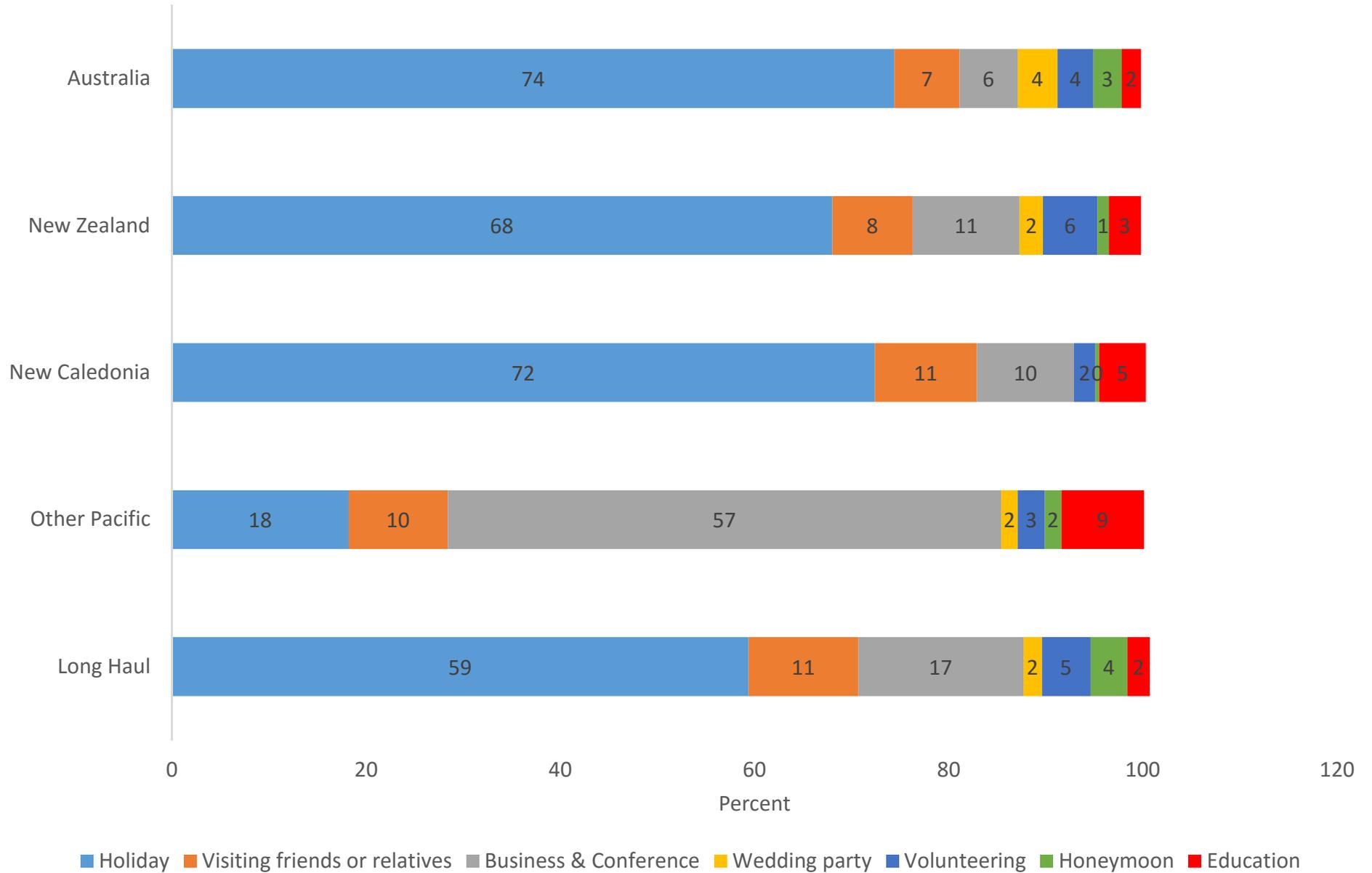
Islands Visited on Trip



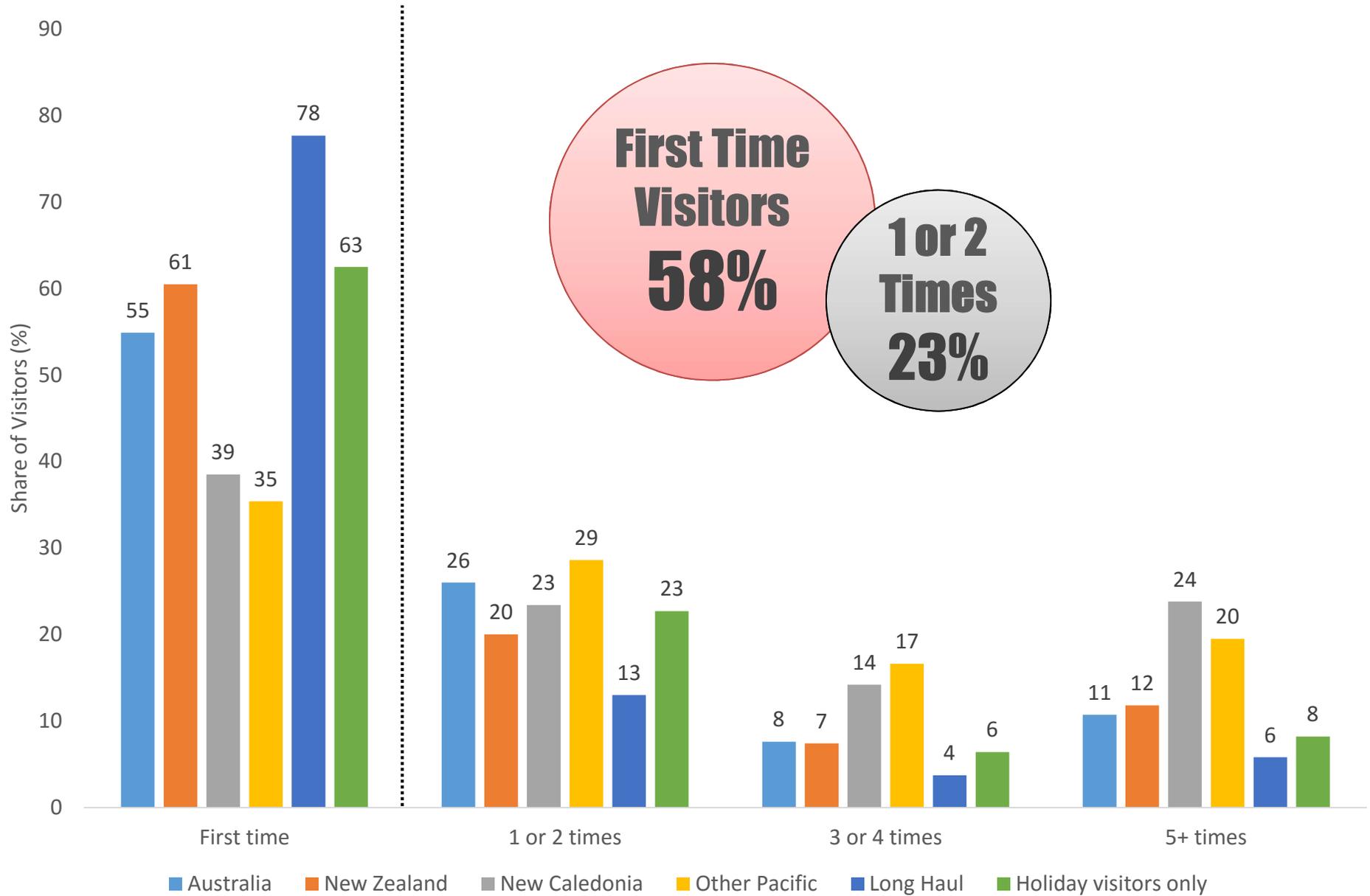
97% Efate (Port Vila)
17% Tanna
15% TEspiritu Santo

Main Purpose of Visit

Visitor Characteristics and Preferences



Previous Visits



Length of Stay (nights)

AVERAGE

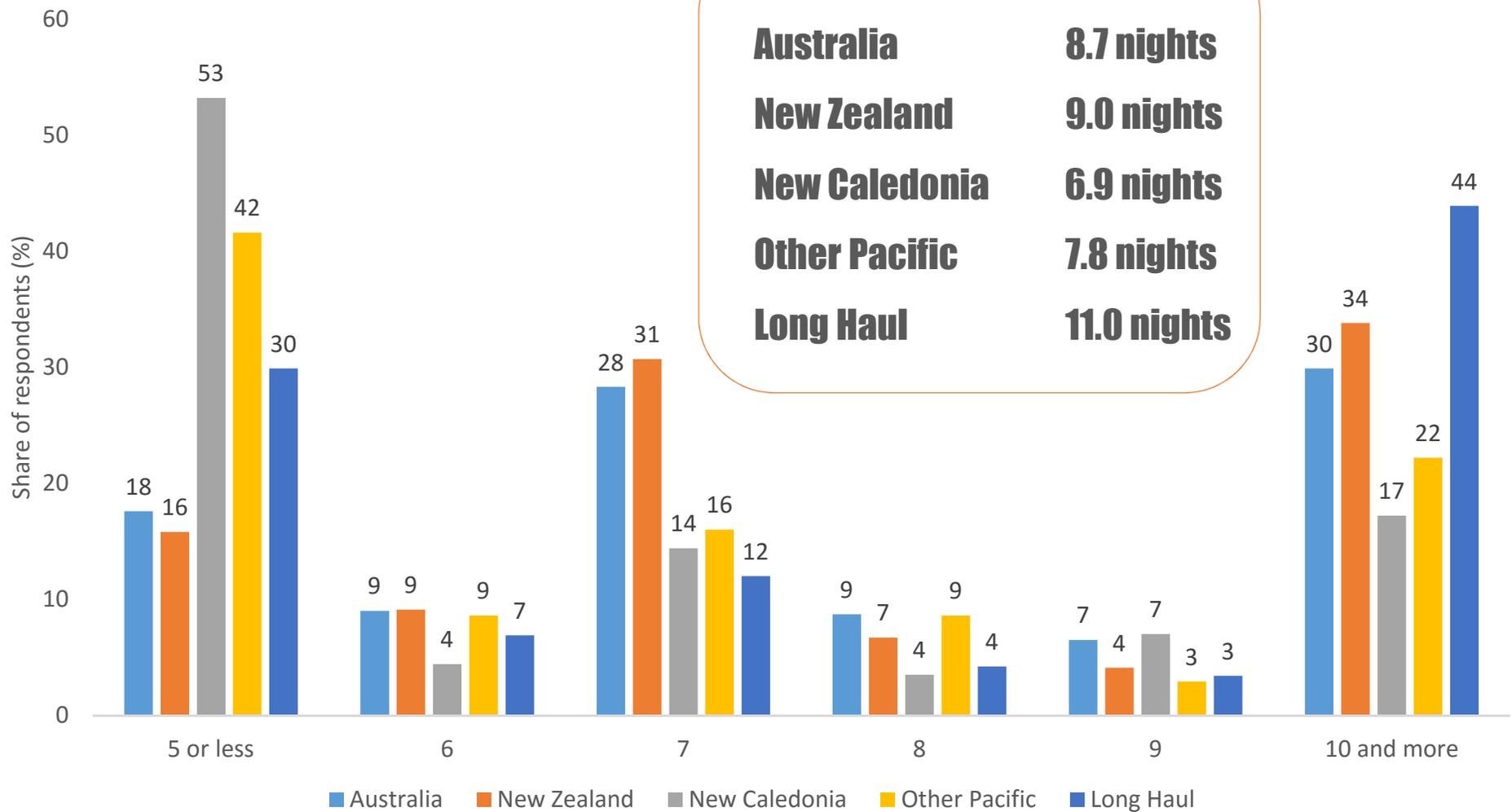
Australia 8.7 nights

New Zealand 9.0 nights

New Caledonia 6.9 nights

Other Pacific 7.8 nights

Long Haul 11.0 nights



Airlines Used for Travel



Air Vanuatu 63%/65%



25%/26%



8%/4%



5%/5%

Others (Qantas, Air
NZ, Solomon
Airlines)

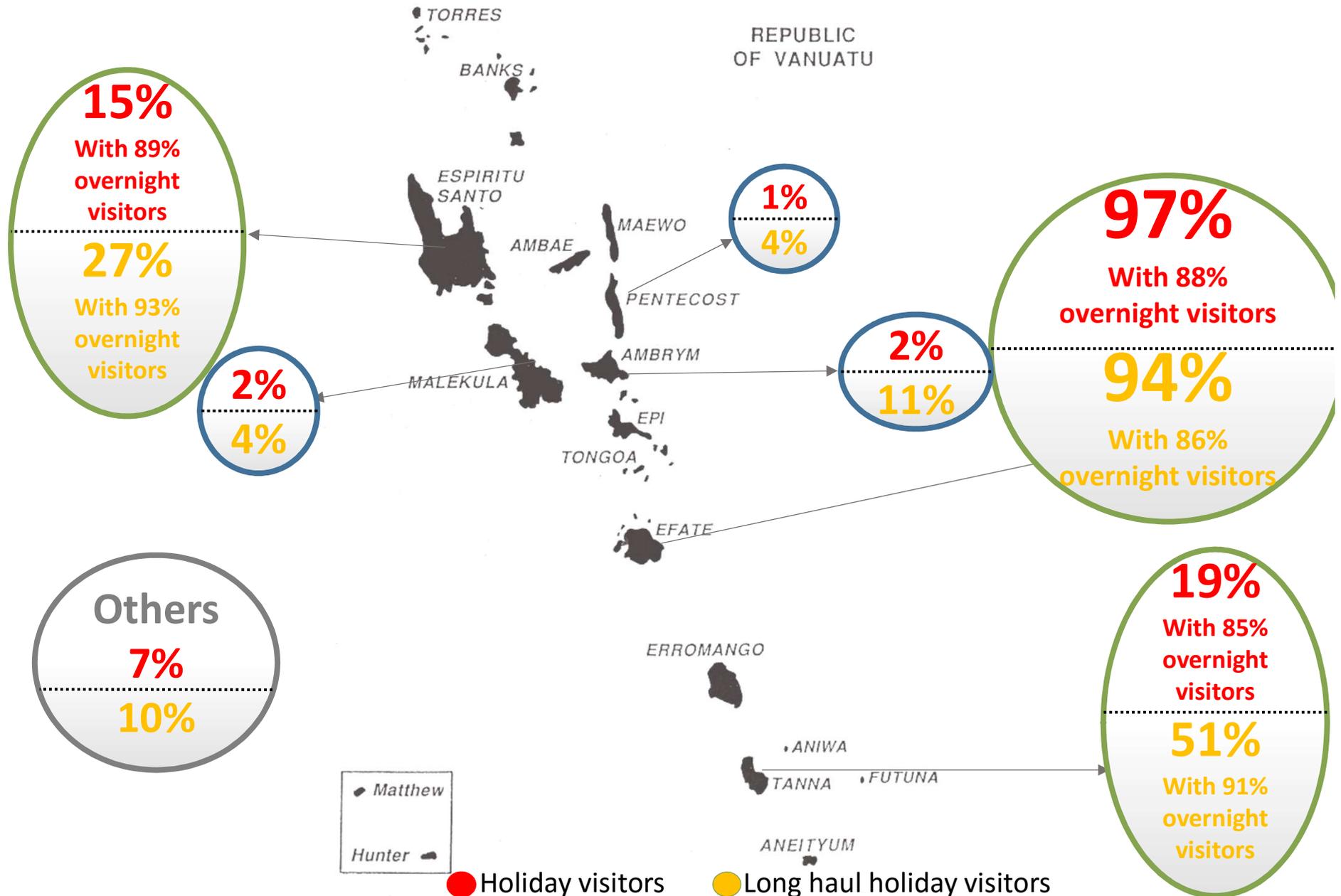
10%/10%



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

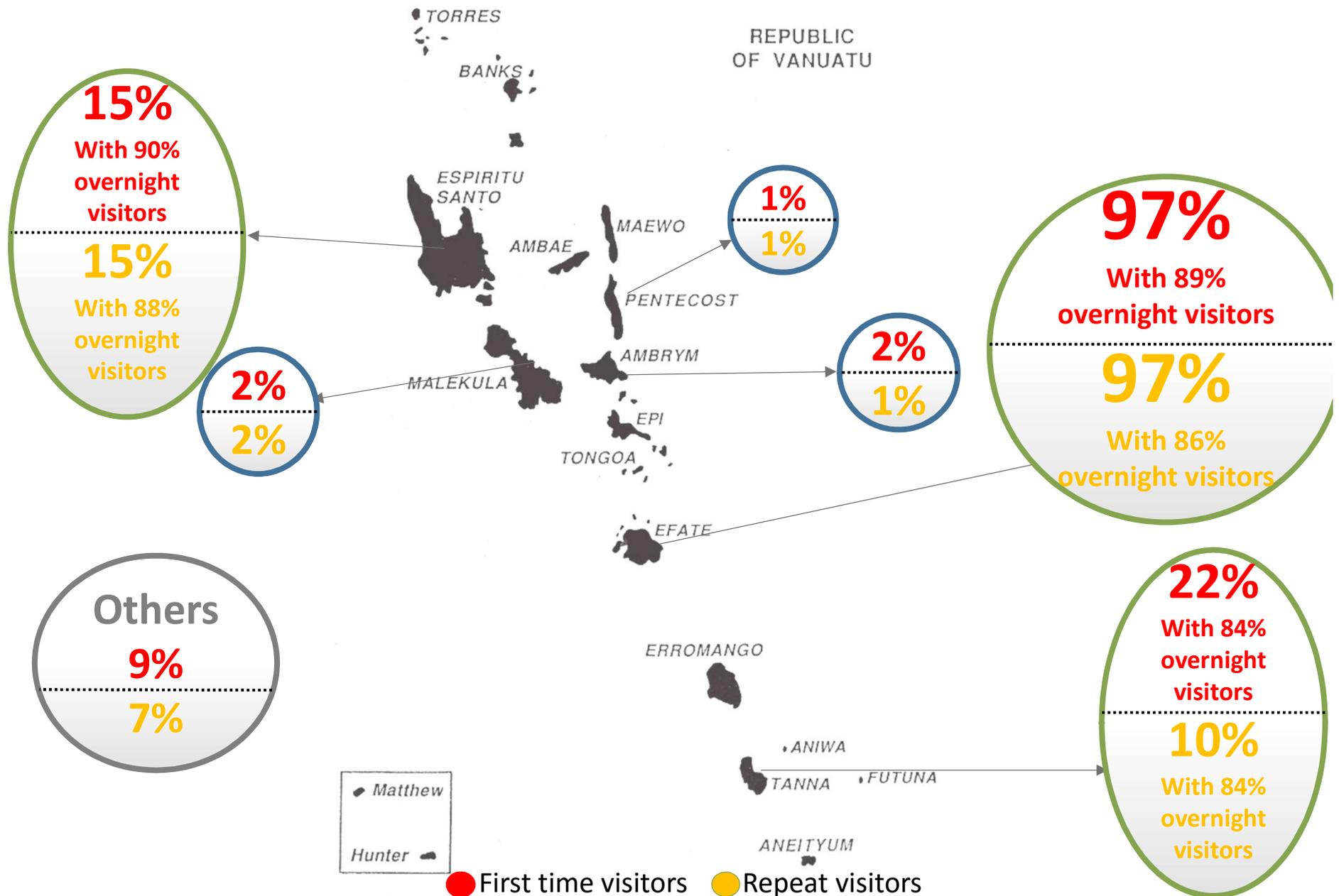
* Text is grey represents all visitors/green represents 'holiday' only

Holiday VS Long Haul Holiday Visitors

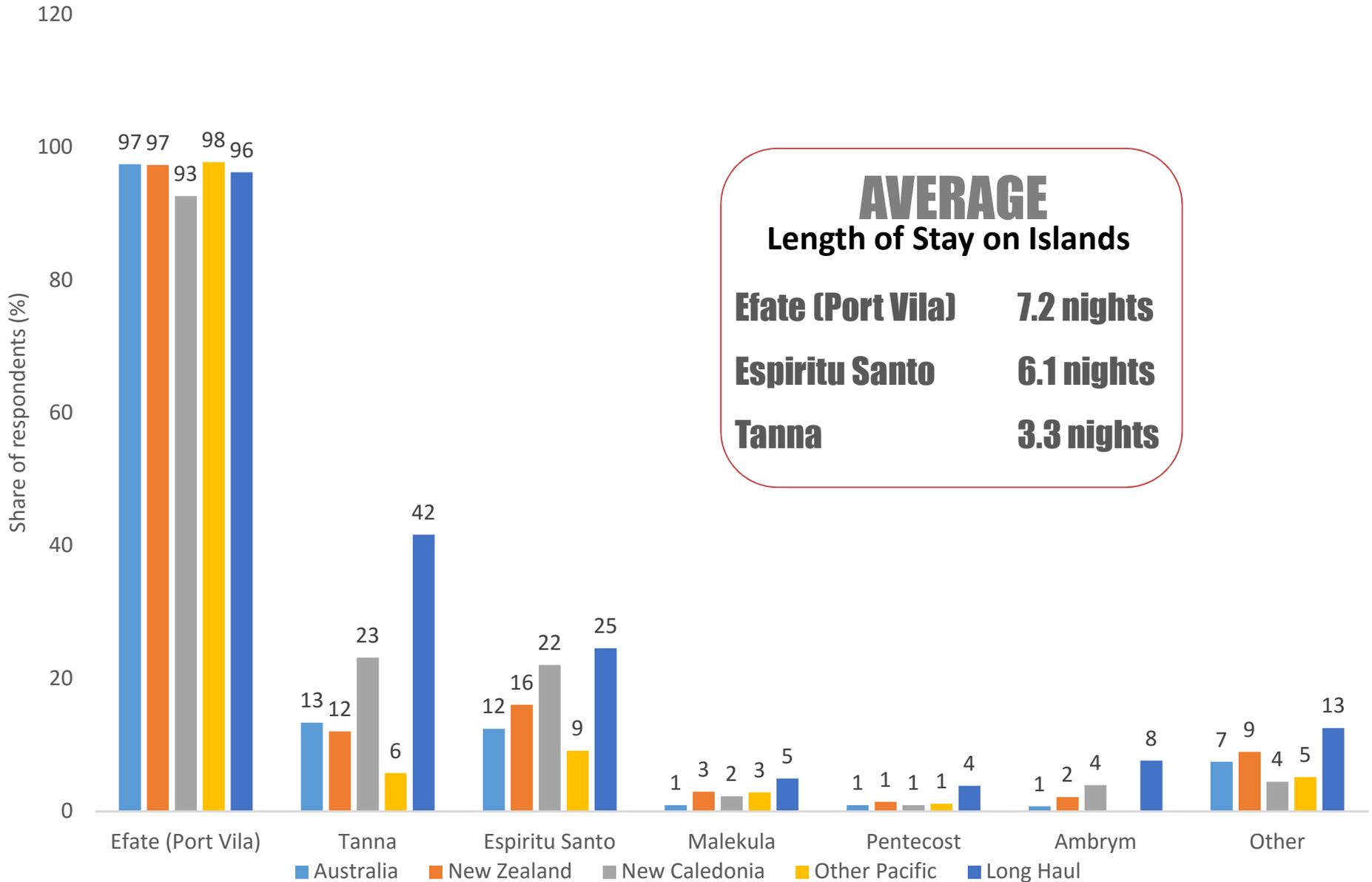


Repeat VS First Time Visitors

Visitor Characteristics and Preferences

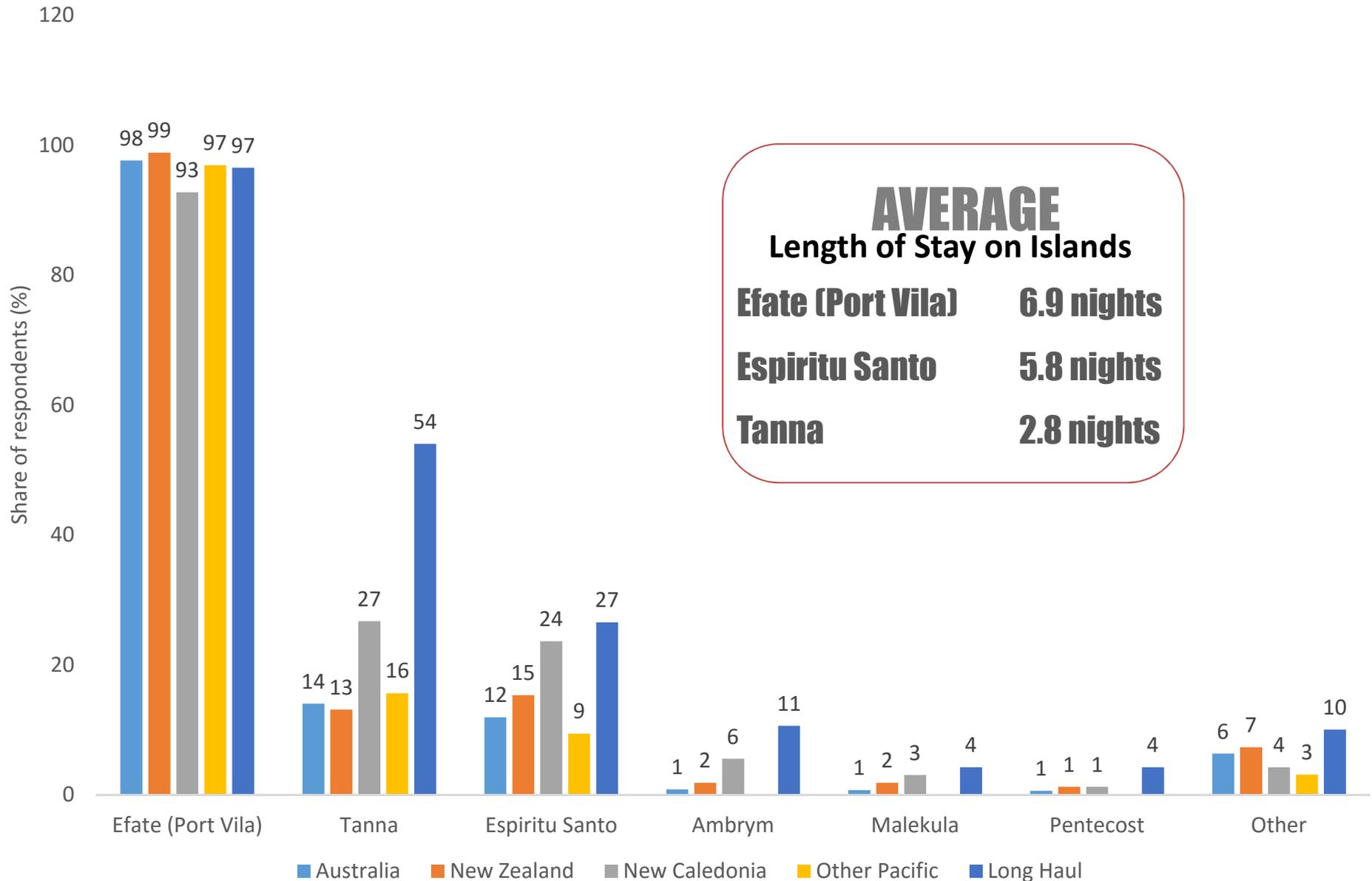


Outer Islands Visited – Country of Origin



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

Outer Islands Visited for holiday visitors



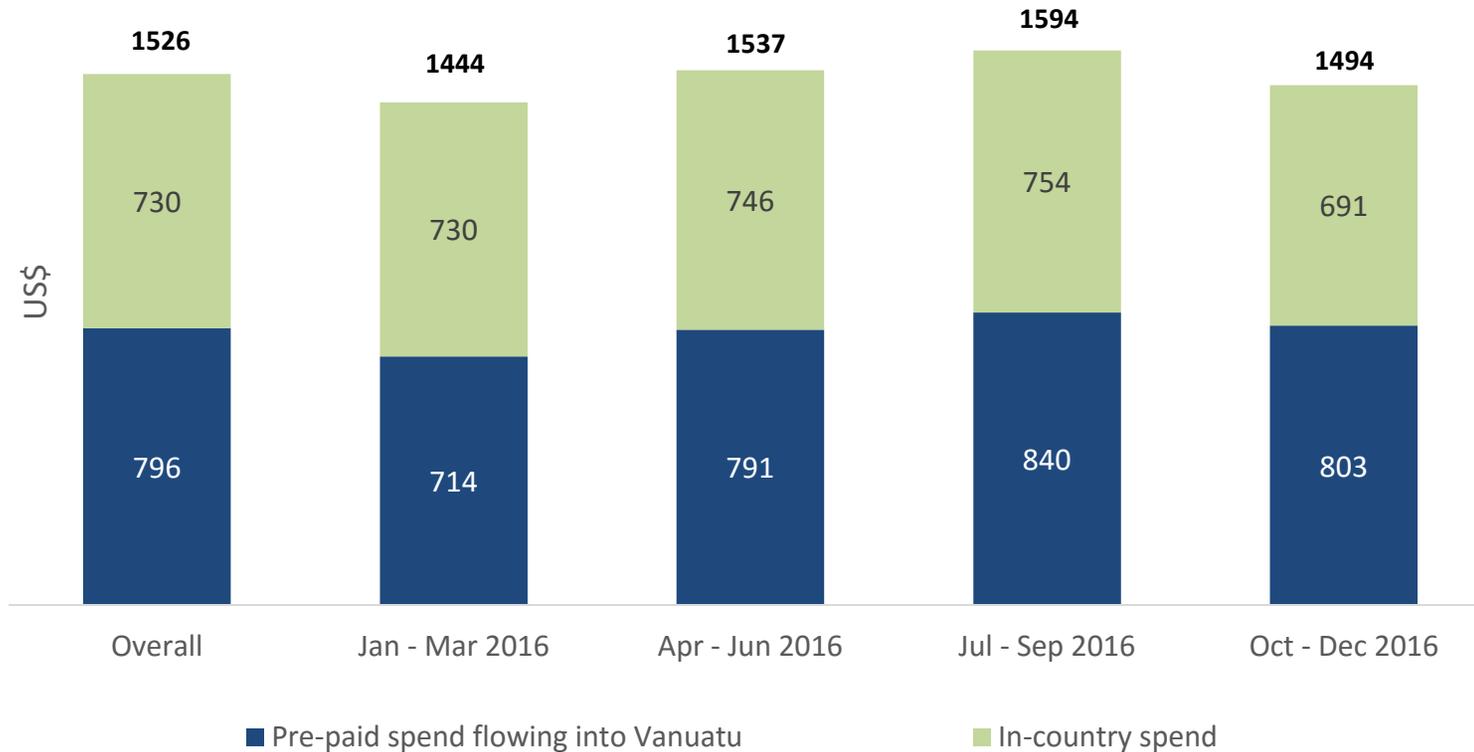
Note: Multiple responses, therefore total does not add up to 100%

Presentation Structure



Expenditure by Season

PER PERSON PER VISIT



Total Direct Economic Impact for 2016

US\$1,526 (Vatu 166,537)
Per person per visit



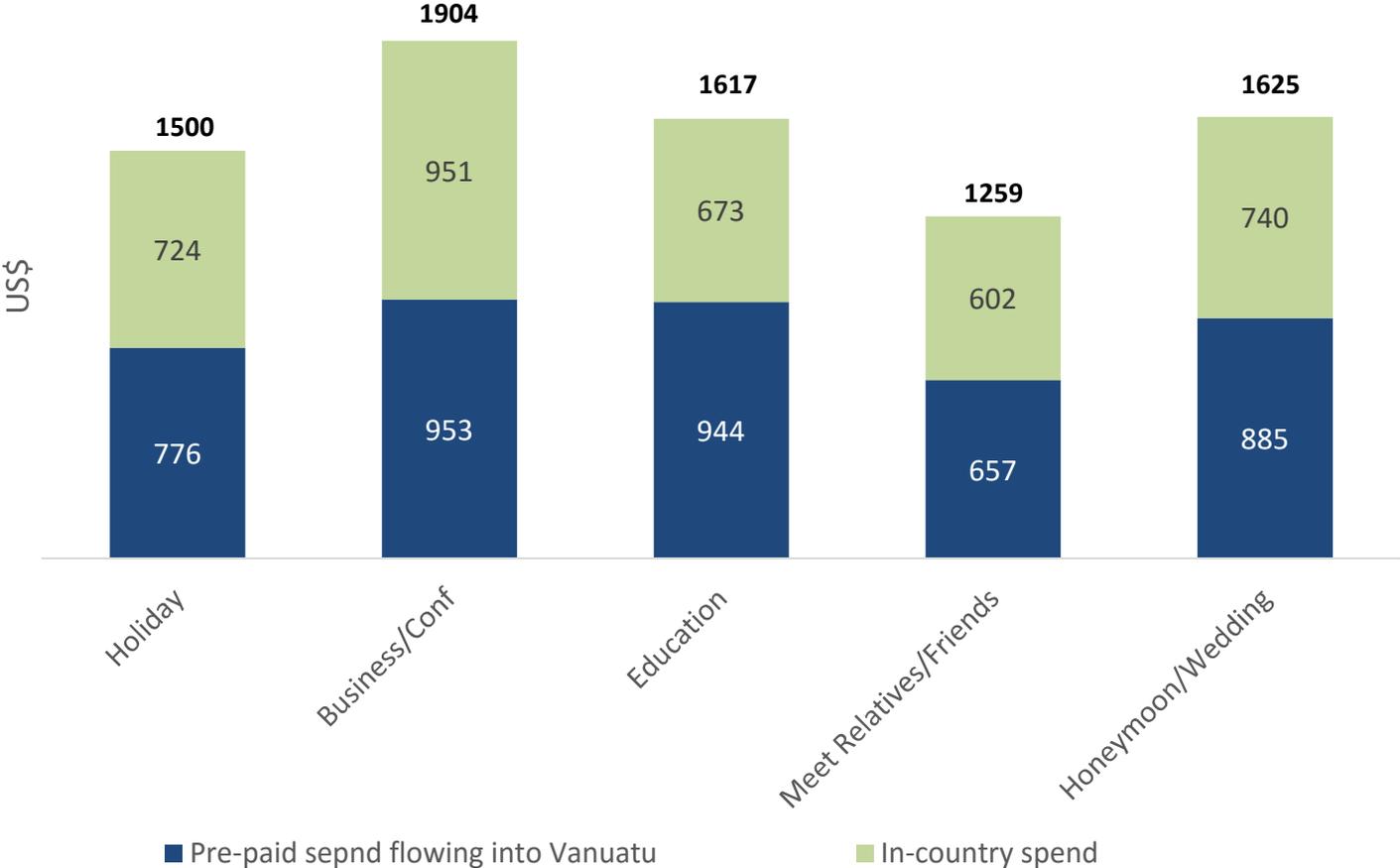
95,117
Visitors



US\$145 million (Vatu 15.8 billion)
flowing back to Vanuatu

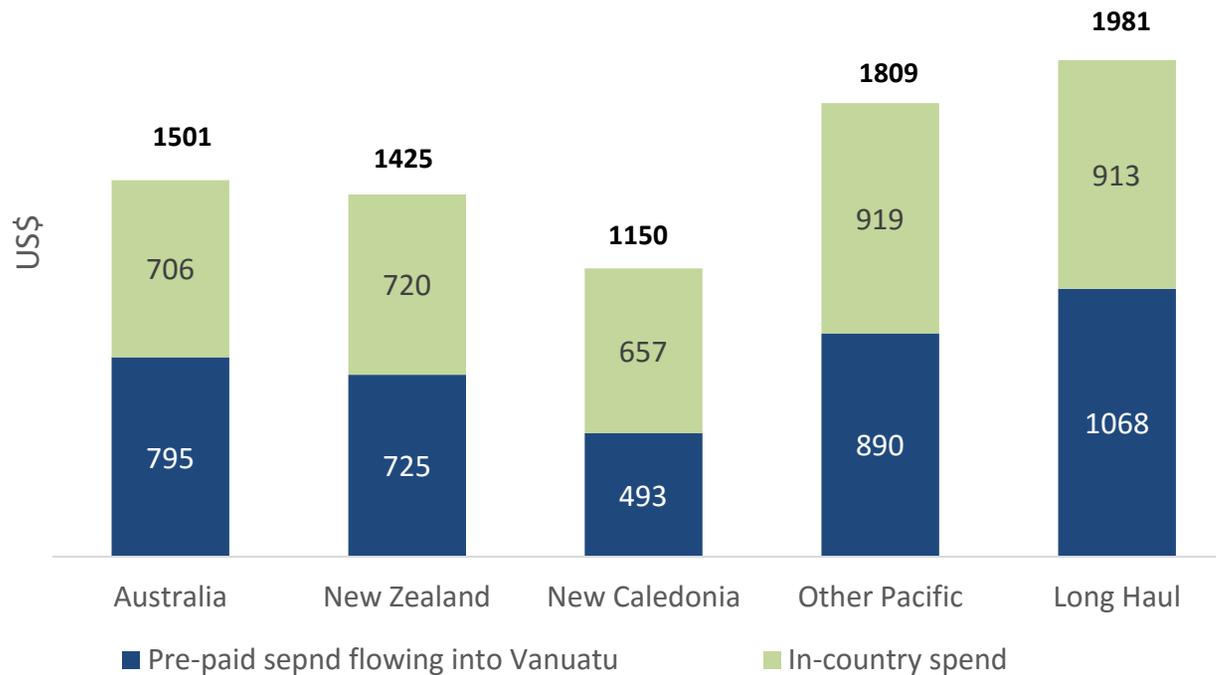
Expenditure by Visitor Type

PER PERSON PER VISIT



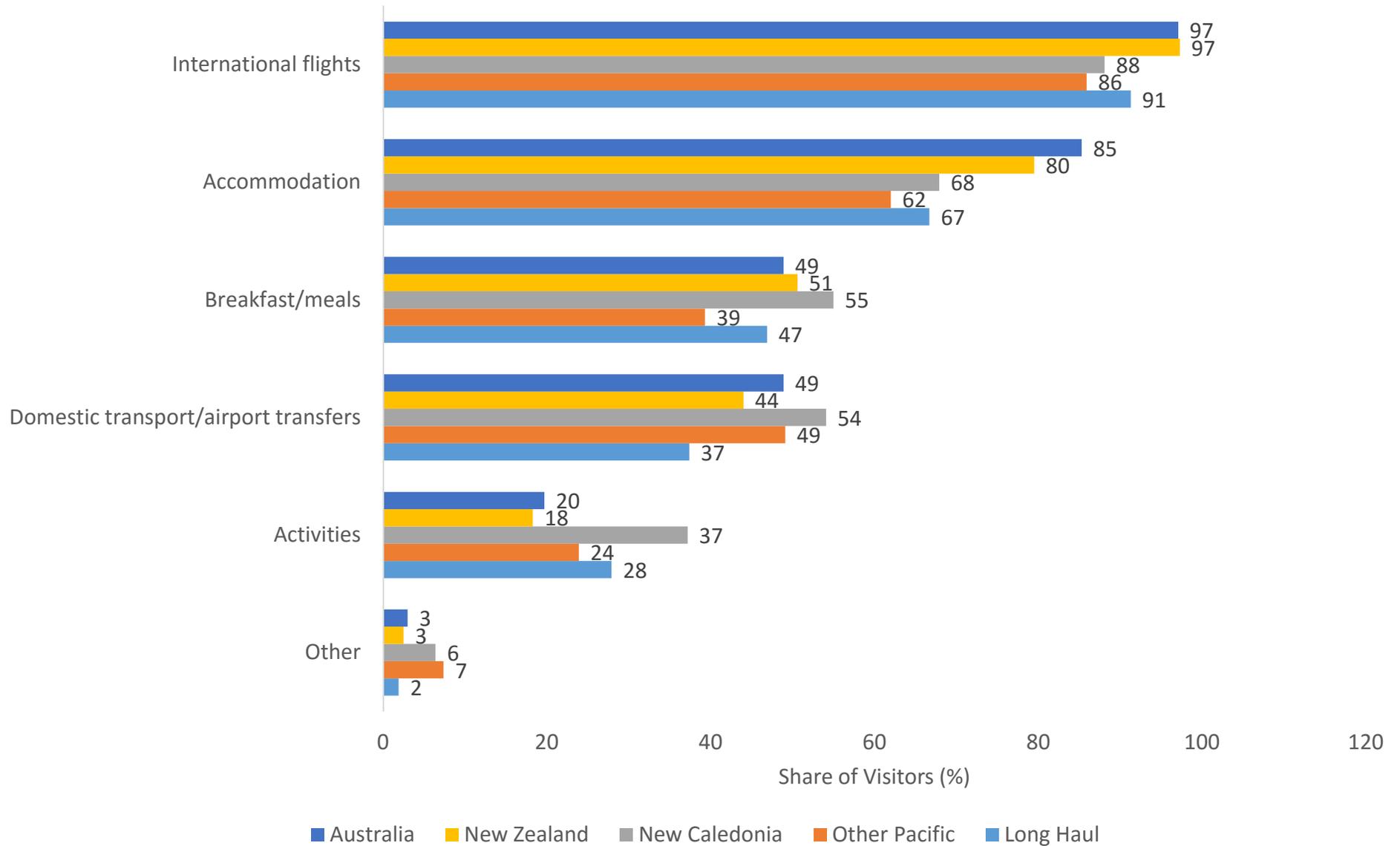
Expenditure by Market

PER PERSON PER VISIT



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

Prior to Arrival Visitor Expenditure (% of visitors)

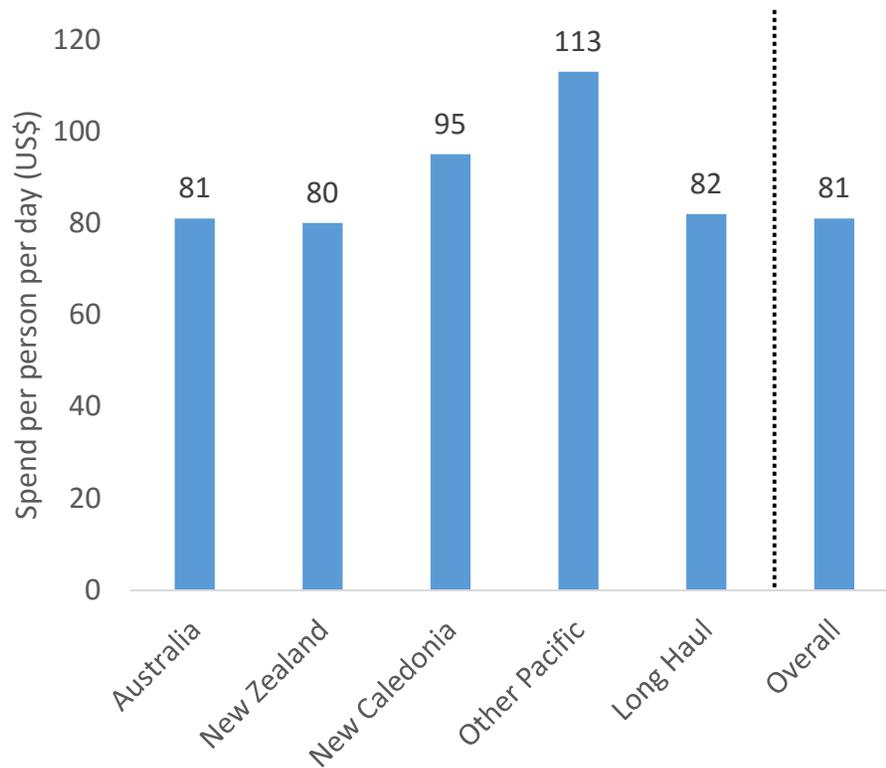


Note: Multiple responses, therefore total does not add up to 100%

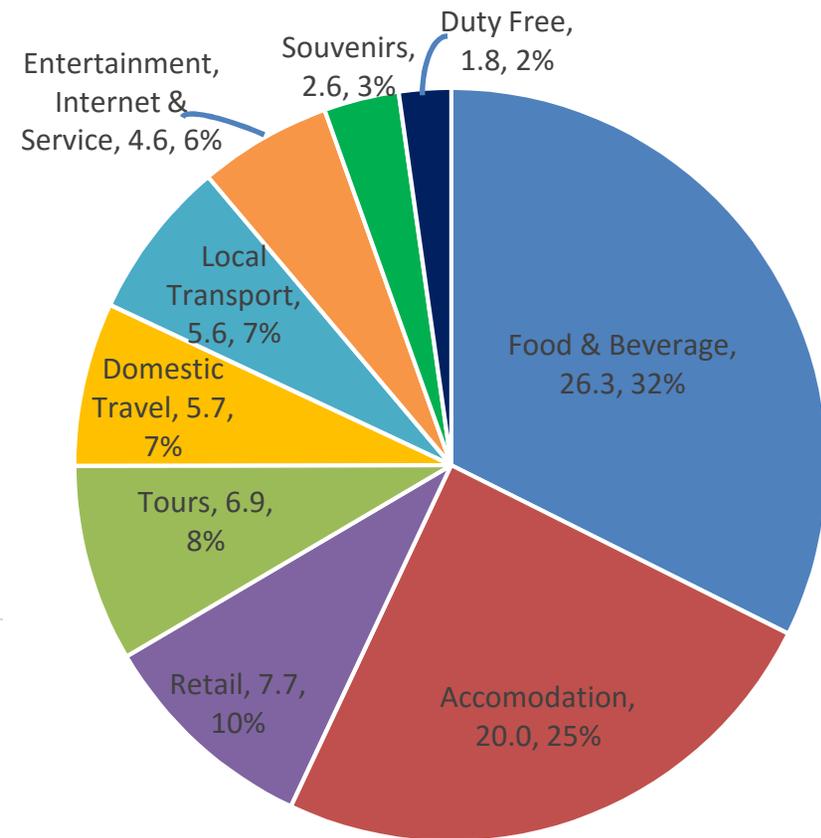
Average Spend while in Vanuatu per day

PER PERSON PER DAY

By Market

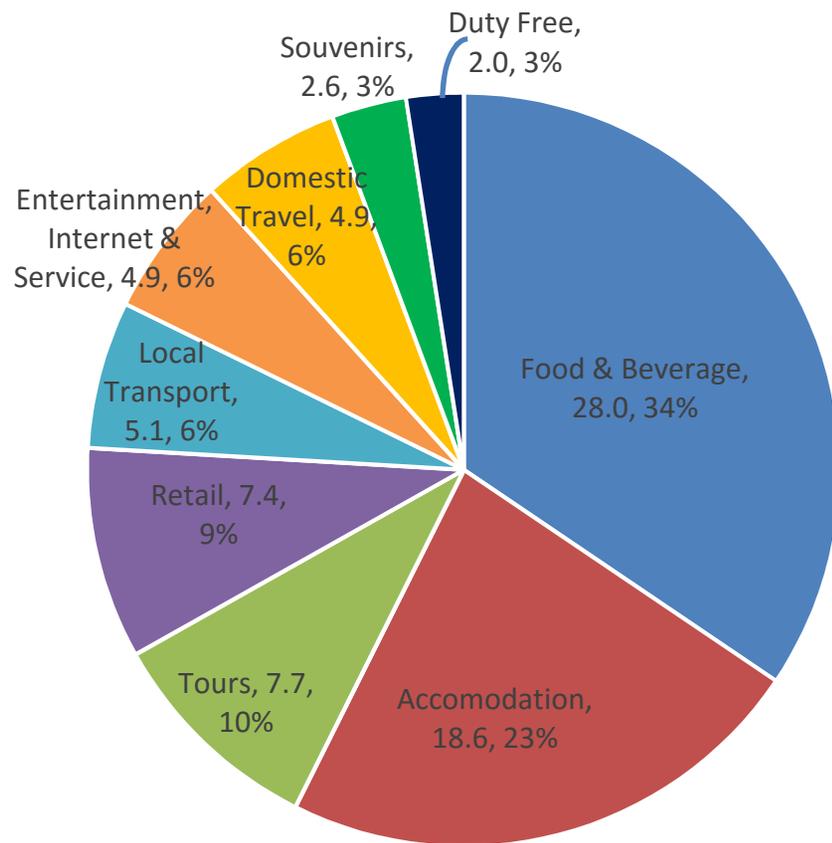


Overall - \$81 per day

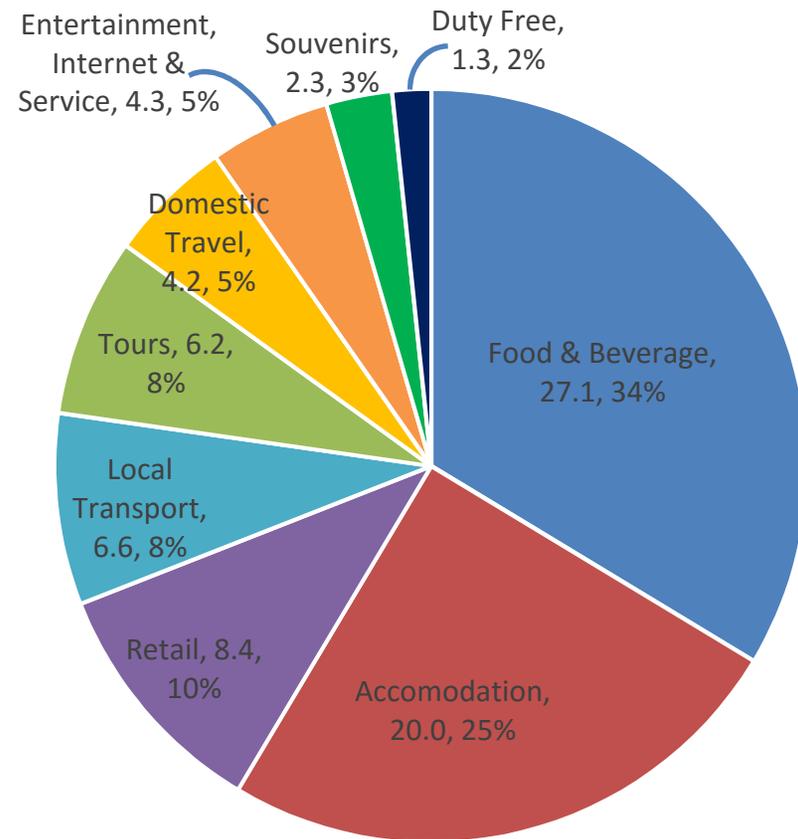


Average Spend while in Vanuatu by Market

Australia - \$81 per day

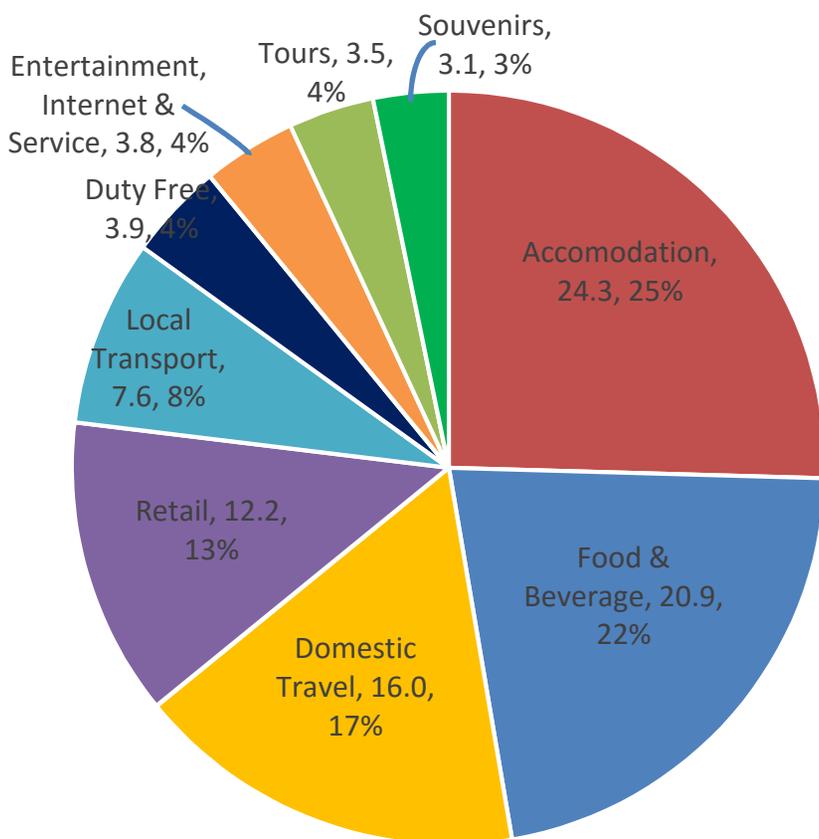


New Zealand - \$80 per day

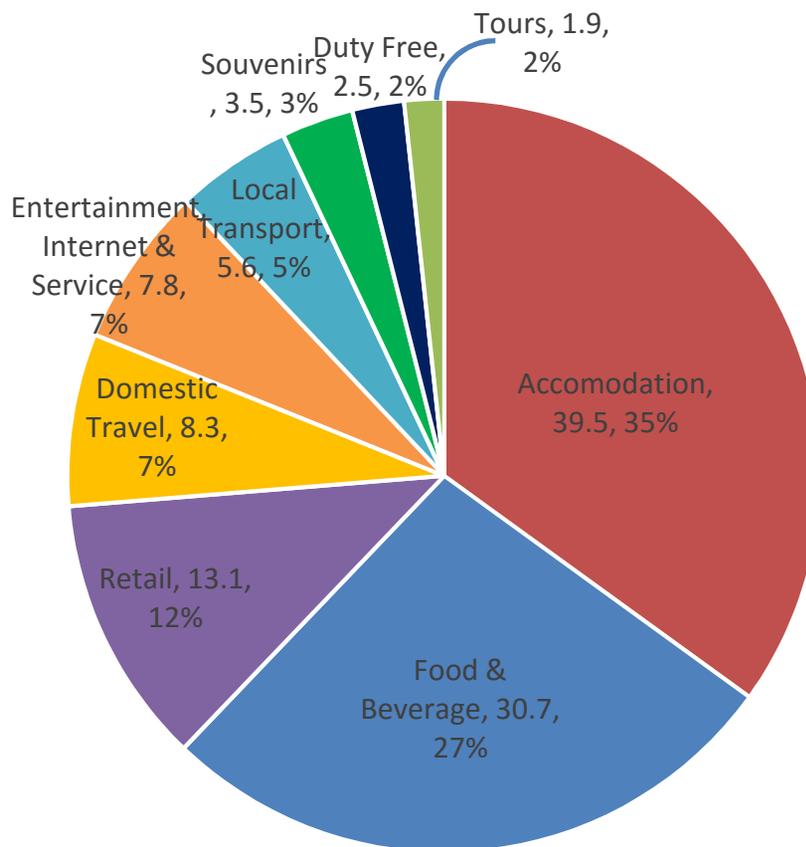


Average Spend while in Vanuatu by Market

New Caledonia - \$95 per day

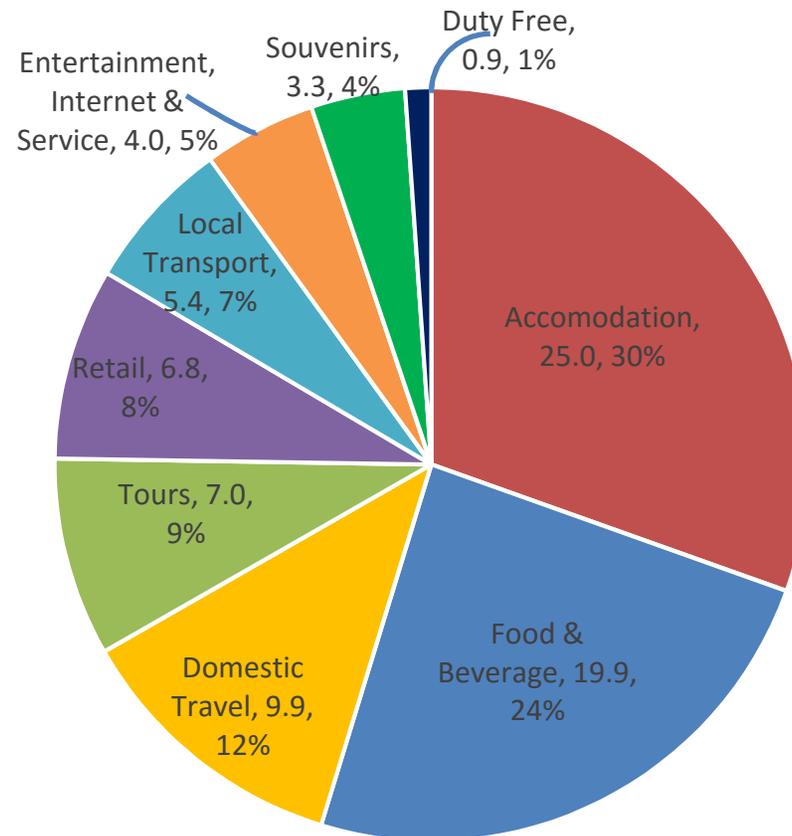


Other Pacific - \$113 per day



Average Spend while in Vanuatu by Market

Long Haul - \$82 per day



Visitor Expenditure – Per Person and Total

	Pre-Paid Spend flowing into Vanuatu	+	In-country Spend	=	Total Spend
Per Day	US\$88 Vt 9,603		US\$81 Vt 8,840		US\$169 Vt 18,443
Whole Trip	US\$796 Vt 86,870		US\$730 Vt 79,667		US\$1,526 Vt 166,537

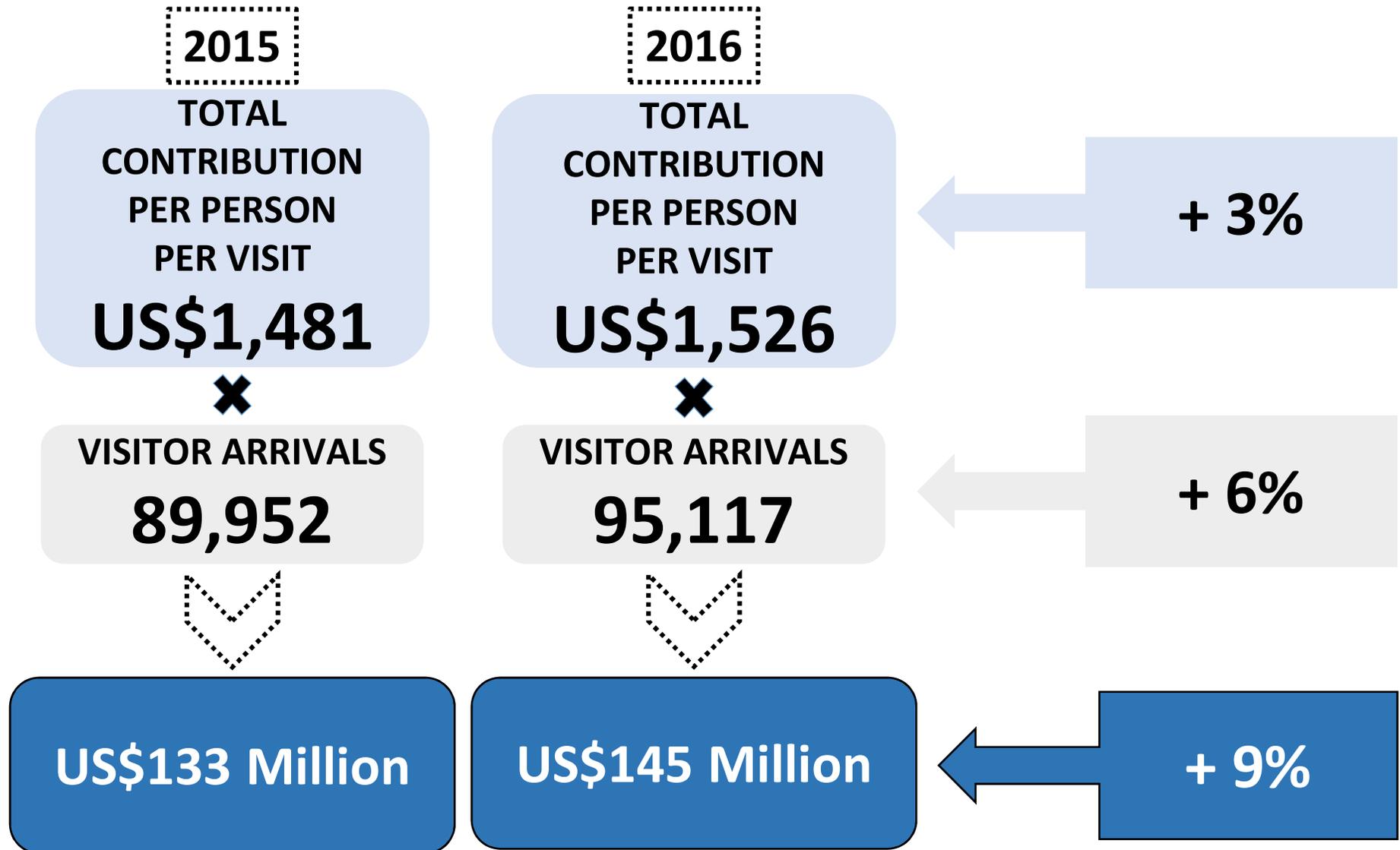
Direct economic impact on Vanuatu for Jan-Dec 2016

US\$145 million / Vt 15.8 billion in total

US\$12 million/ Vt 1.3 billion per month

Visitor Expenditure – Comparison 2015 and 2016

Visitor Spending and Impact



Presentation Structure



Information Sources and Decision Making



Information Sources and Decision Making

How did you find out about Vanuatu?

- 37% Friends and Family
- 31% Previous Visits
- 13% General Websites



Information Sources for Planning

- 43% General Travel Websites
- 41% Friends and Family
- 33% Previous Visits
- 27% Travel agent/travel brochures

Purchasing Behavior

- 54% By Myself
- 27% Travel Agent

What influenced your decision making?



Beaches and swimming
3.4 out of 5



Quiet and relaxing atmosphere
3.7 out of 5

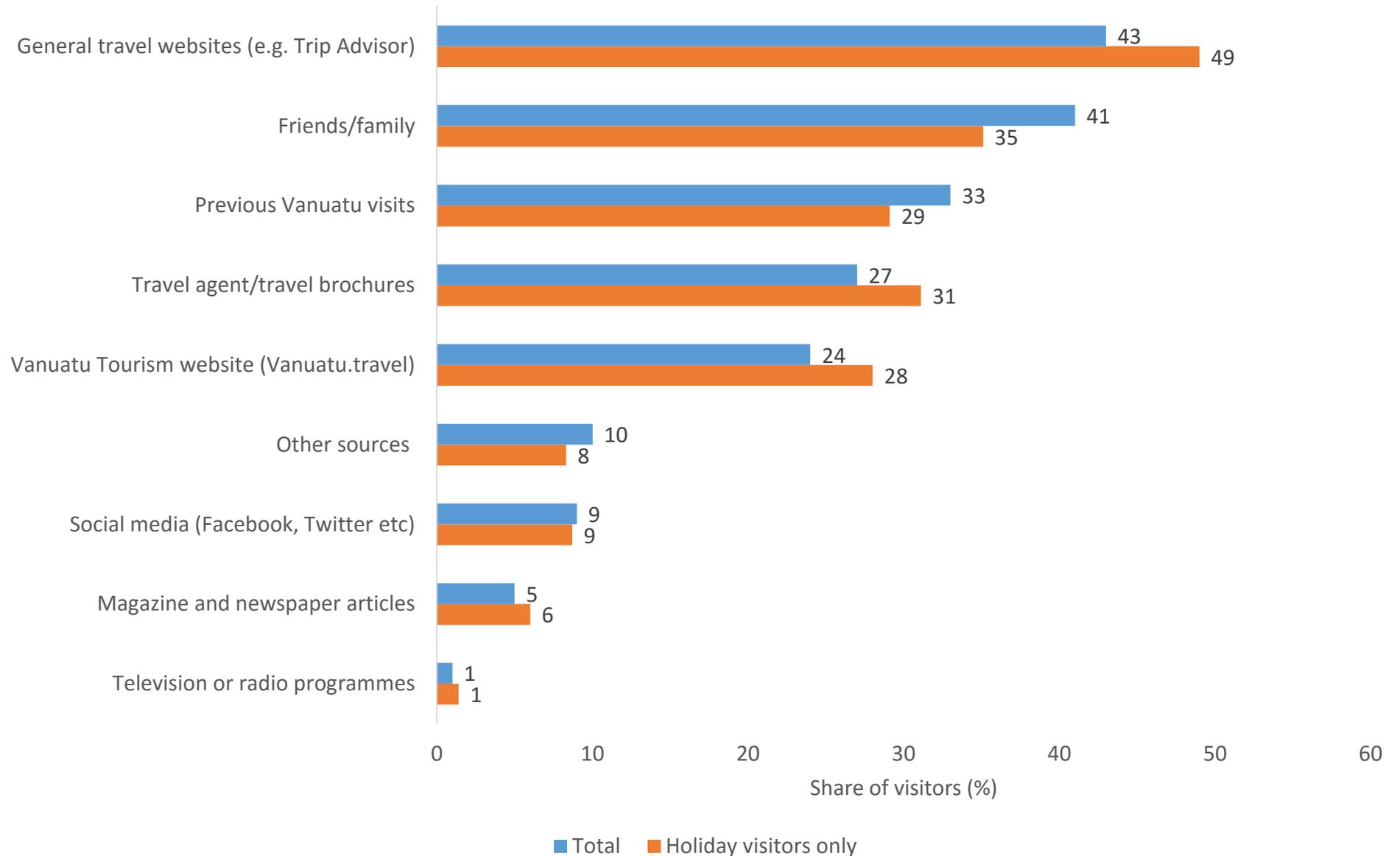


3.4 out of 5
Accessibility/Location

Influences on the decision to choose Vanuatu

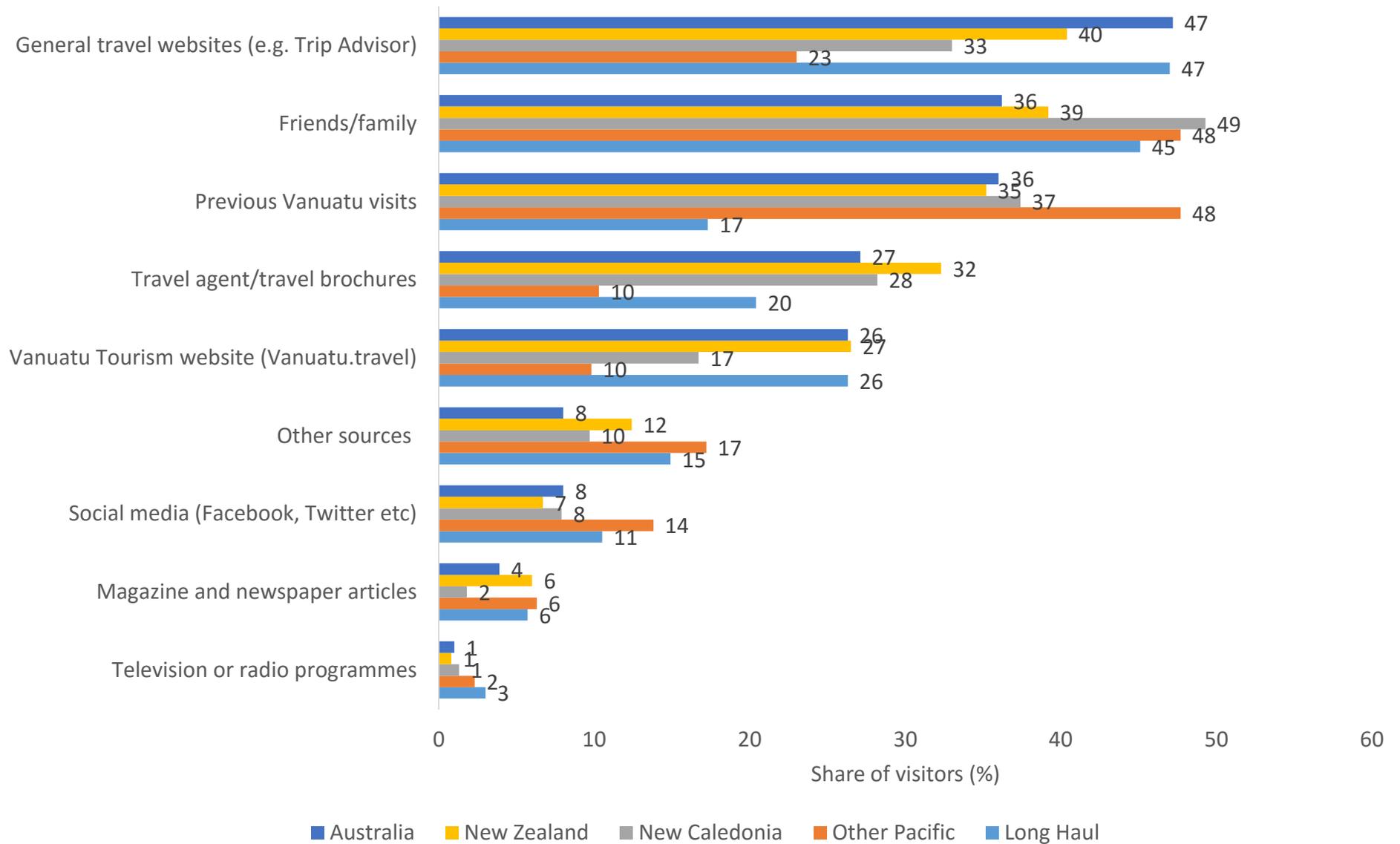
Country of origin	Influences on the decision to choose Vanuatu (score out of 5)			
Australia	Quiet and relaxing atmosphere 3.9	Accessible 3.6	Beaches and swimming 3.6	Affordable 3.4
New Zealand	Quiet and relaxing atmosphere 3.6	Beaches and swimming 3.5	Accessible 3.3	Snorkelling and diving 3.3
New Caledonia	Natural attractions/ volcano/ Ecotourism 3.8	Quiet and relaxing atmosphere 3.7	Accessible 3.7	Affordable 3.5
Other Pacific	Business or conference 3.6	Quiet and relaxing atmosphere 3.2	Accessible 3.2	Natural attractions/ volcano/ Ecotourism 3.1
Long Haul	Natural attractions/ volcano/ Ecotourism 3.8	Culture and History 3.4	Quiet and relaxing atmosphere 3.1	Beaches and swimming 3.1

Sources Used for Planning



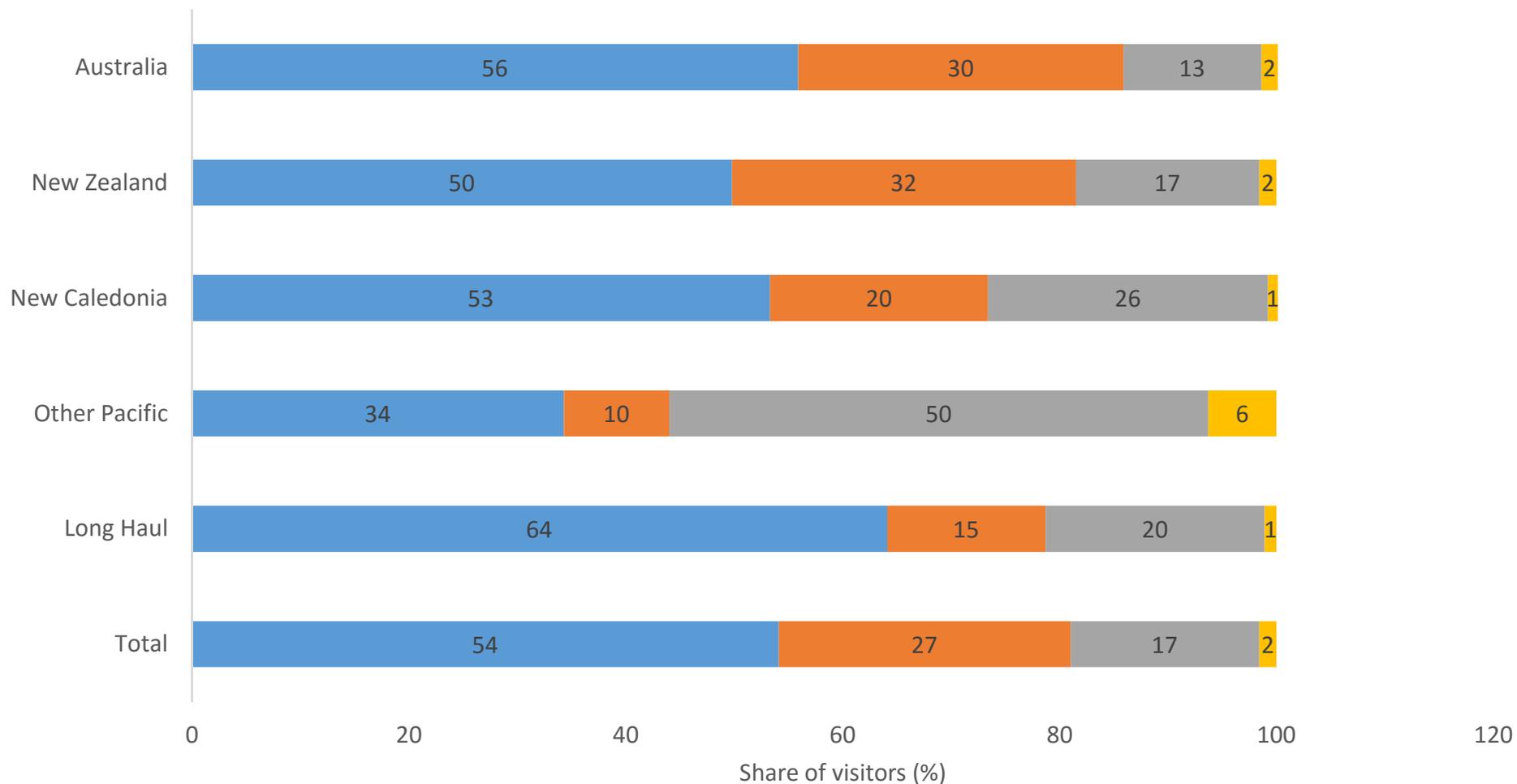
Note: Multiple responses, therefore total does not add up to 100%

Sources Used for Planning – Market



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

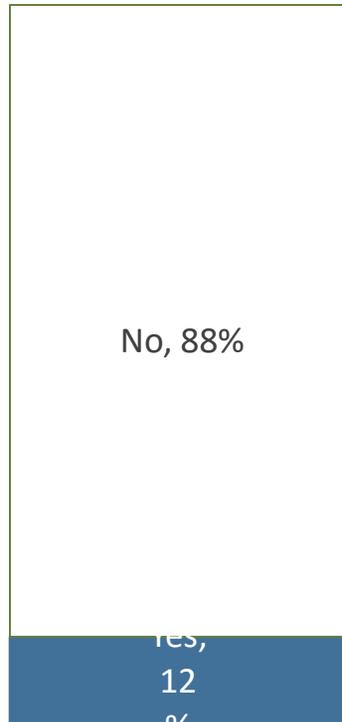
Travel Purchasing Behaviour by Market



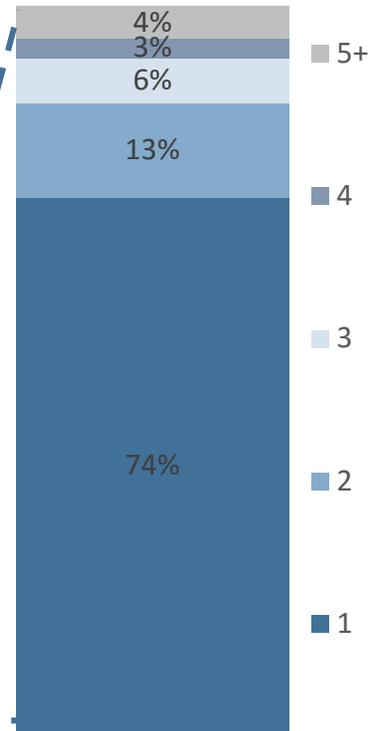
- I made my own travel arrangement (through online website or booked with hotels/airlines)
- I purchased a pre-paid travel package through a travel agent
- Travel arrangements were made by others (business, friends, relatives)
- Other

Cruise visits to Vanuatu for AUS/NZ holiday visitors

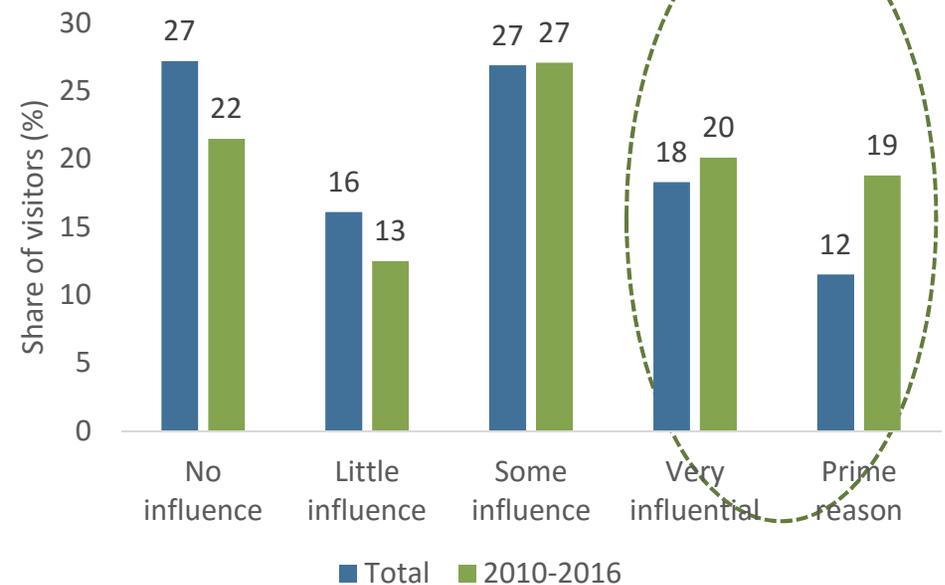
Been on a cruise to Vanuatu before?



If Yes, how many times?



Did cruising before influence your decision to come back?



Presentation Structure

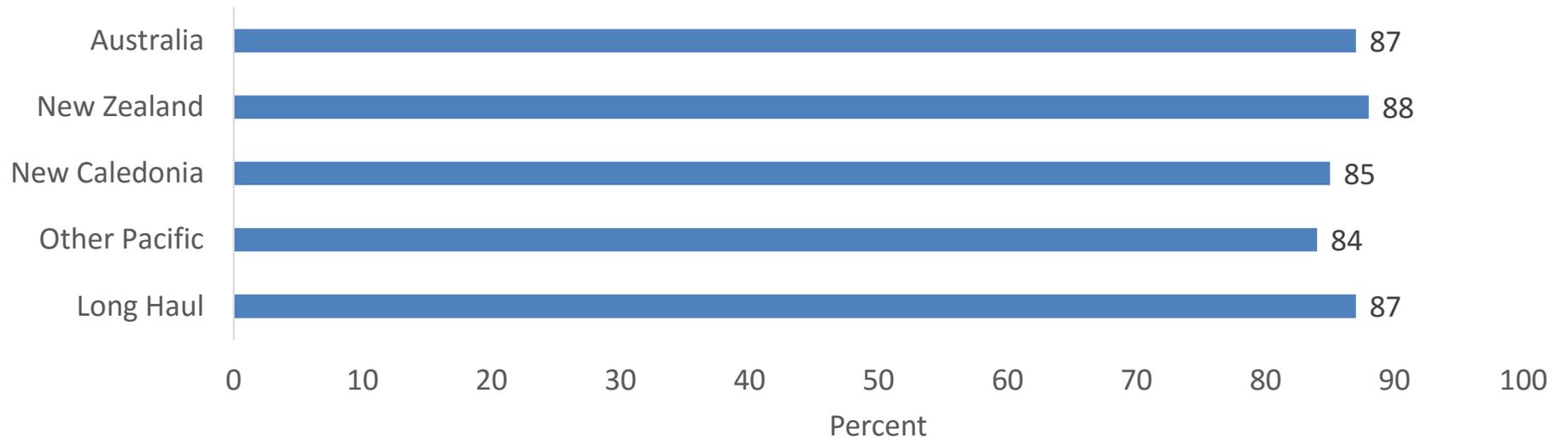


Visitor Satisfaction

Overall Satisfaction*

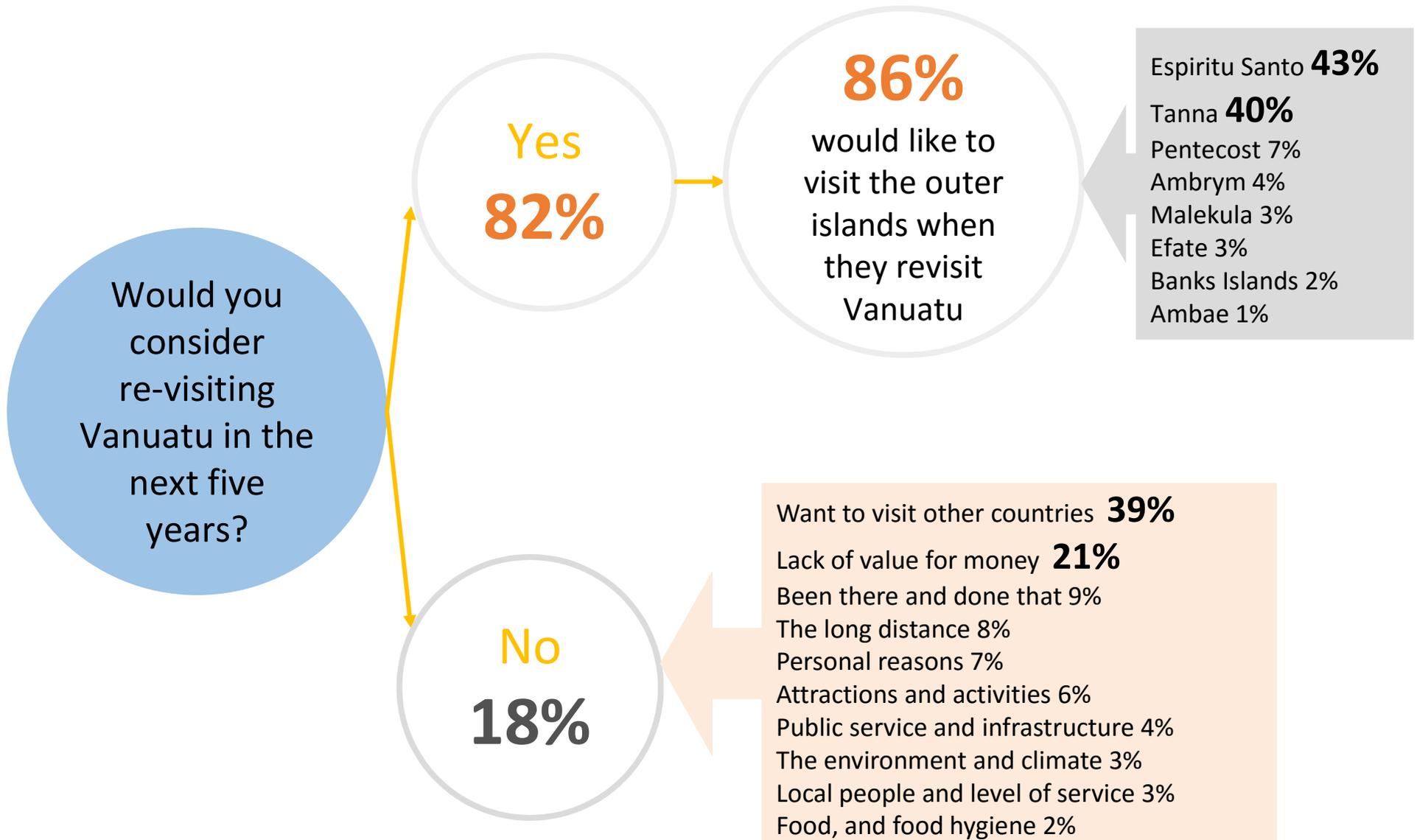
87% Total visitors satisfied
 88% Holiday visitors satisfied
 87%/87% of first time/repeat visitors satisfied

Satisfaction by Market

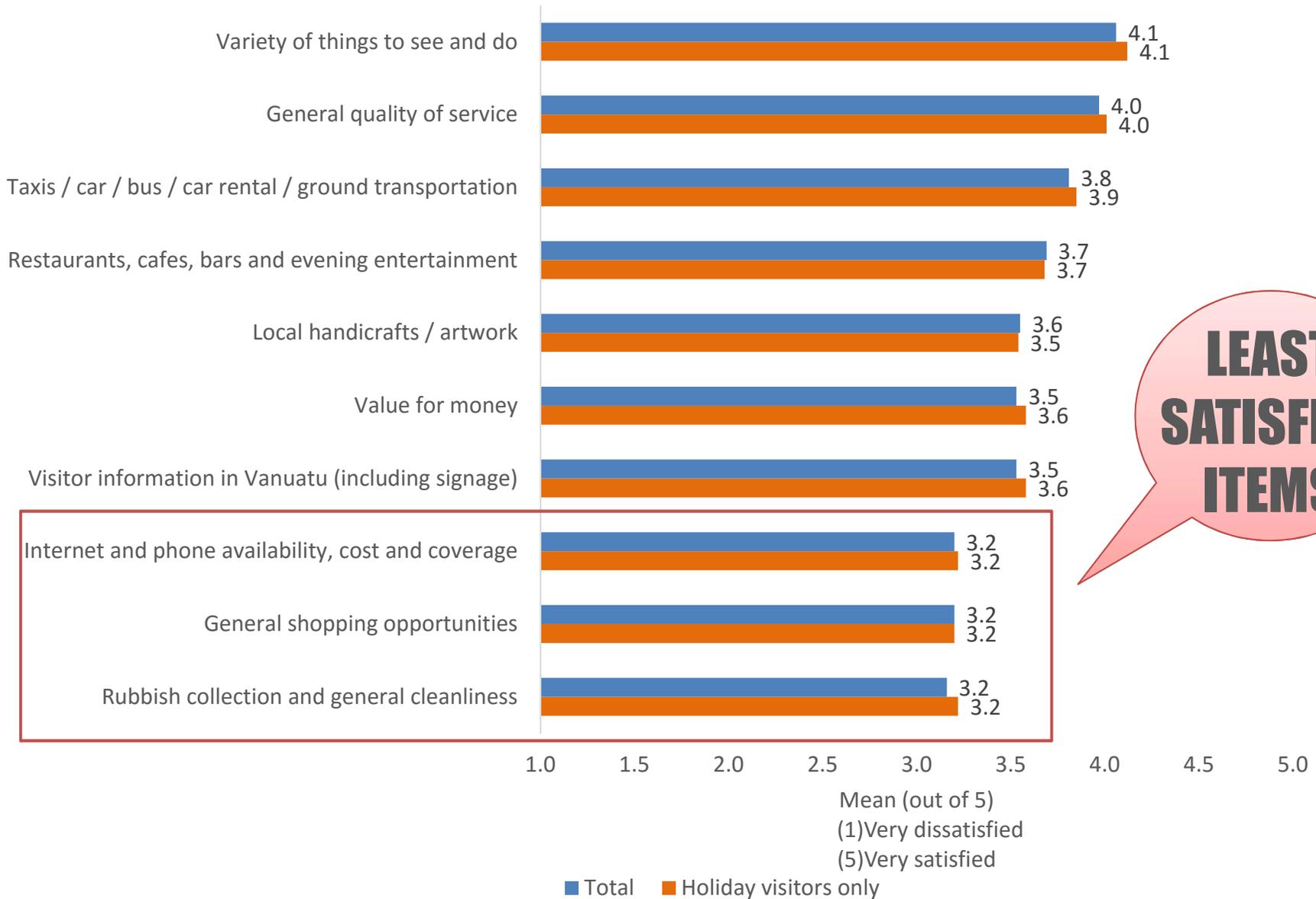


* Satisfied includes respondents who answered 'satisfied' or 'very satisfied'

Willingness to Return



Degree of Satisfaction – Holiday Visitors



LEAST SATISFIED ITEMS

Most and Least Appealing Aspects

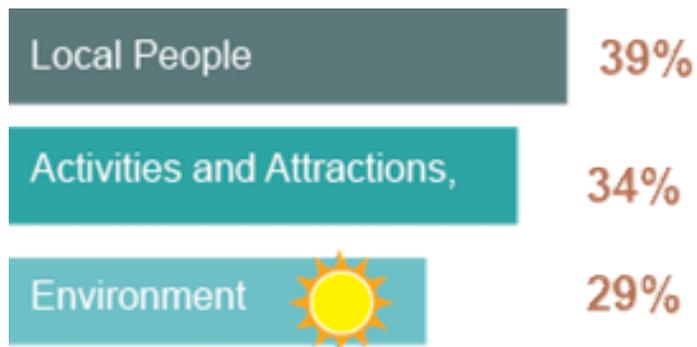
Most Appealing Aspects



Least Appealing Aspects



Most Appealing Aspects for Holiday Visitors



Least Appealing Aspects for Holiday Visitors



Most Appealing Aspects

Most Appealing
Aspects

Themes	ANNUAL	Oct to Dec 2016	April –Sept 2016	Dec- March 2015/2016
Local people	41.1%	30.9%	45.5%	46.6%
Activities, attractions and entertainment, events	34.3%	33.2%	35.8%	32.5%
Environment	32.2%	33.8%	32.4%	29.1%
Atmosphere	12.8%	13.9%	11.7%	13.7%
Food and Beverage	8.4%	8.1%	8.1%	9.2%
Culture and history	7.4%	8.0%	7.2%	6.9%
Accommodation	6.6%	4.8%	6.9%	8.6%
Level of service	3.9%	2.3%	4.1%	6.0%
Convenience	2.3%	1.5%	2.8%	2.5%
Safety	2.0%	2.0%	2.4%	1.4%
Un-commercial	1.6%	1.0%	1.9%	1.7%
Overall good experience	1.2%	0.9%	0.9%	2.3%
Cyclones	1.0%	0.2%	1.1%	1.8%
Value for money	0.7%	0.3%	1.0%	0.4%

Least Appealing Aspects

Themes	ANNUAL	Oct to Dec 2016	April -Sep 2016	Dec- March 2015/2016
Public Services and Facilities	26.6%	31.6%	25.3%	22.8%
Rubbish, Cleanliness and Natural Environment Care	17.7%	18.3%	17.9%	16.2%
Price of Goods and Services	17.2%	19.6%	16.6%	15.3%
Food and Beverage	12.4%	13.1%	11.9%	12.8%
Attractions and Activities	10.9%	18.3%	8.5%	6.6%
Local People and Standard of Service	7.9%	12.1%	5.4%	8.5%
Bus, Rental cars, Scooters and Transport	7.5%	10.0%	7.4%	4.1%
Shops	6.0%	5.9%	5.9%	6.4%
Social Divide and Social Issues	4.3%	4.1%	3.8%	6.0%
Accommodation	4.2%	6.2%	3.4%	3.5%
Flight Related Issues	3.4%	3.8%	3.2%	3.3%
Safety Related Issues	3.4%	3.2%	4.1%	2.0%
Airport	3.1%	8.0%	0.7%	2.3%
Cruise Ships	2.6%	3.5%	2.3%	2.3%
Cyclone	2.4%	1.8%	2.4%	3.3%
Weather	2.3%	3.2%	1.5%	2.9%
Other Tourists	2.0%	2.9%	2.0%	0.7%
Stray Animals, Mosquitos and Diseases	1.6%	1.8%	1.4%	2.1%

Suggestions for Improvement

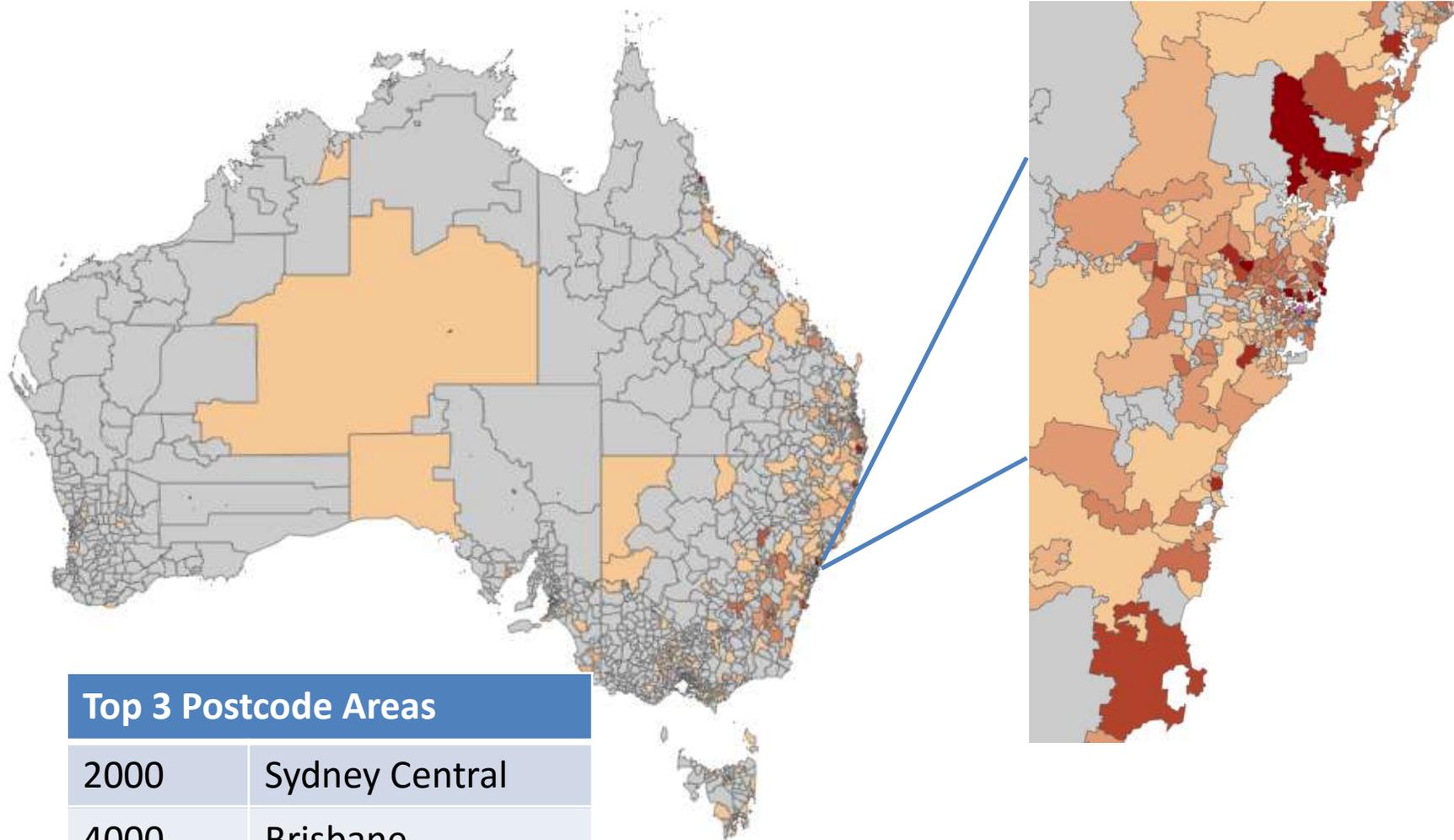
Themes	ANNUAL	Oct – Dec 2016	Apr – Sep 2016	Dec – March 2015/2016
Public services and infrastructure	37%	41%	33%	30%
Entertainment, activities, transport	11%	10%	13%	8%
Food quality and price	10%	12%	10%	10%
Environment	9%	8%	10%	8%
Flights	8%	7%	7%	12%
Local people, standards of service	8%	11%	7%	7%
Charges, entrance fee, value for money	7%	6%	10%	10%
Accommodation	7%	8%	7%	8%
Shopping experience	3%	5%	2%	4%
Safety	2%	1%	1%	3%
Weather	1%	1%	1%	0%
Sickness	1%	1%	1%	2%

THANK YOU



ANNEX

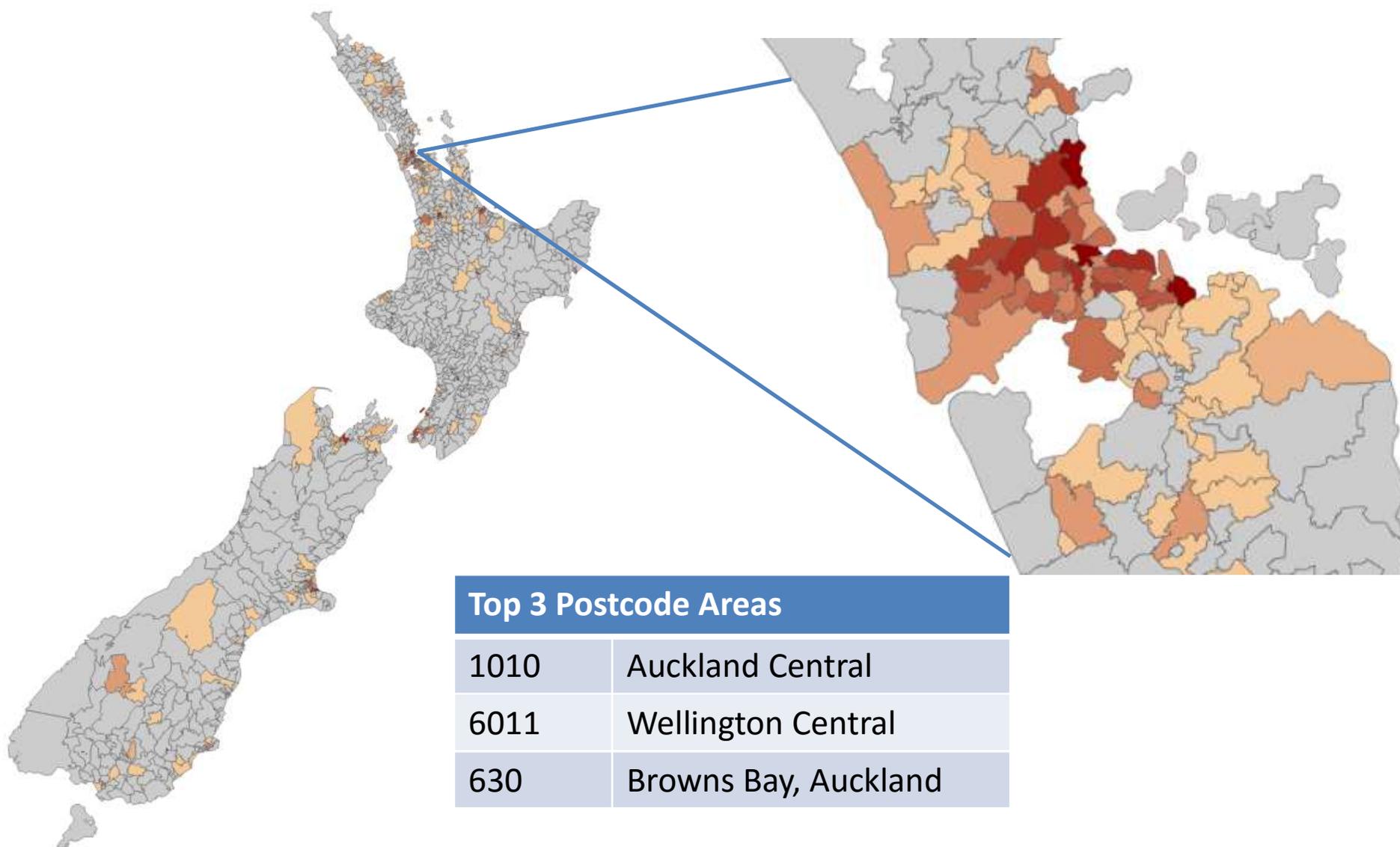
Heat Maps for Australia



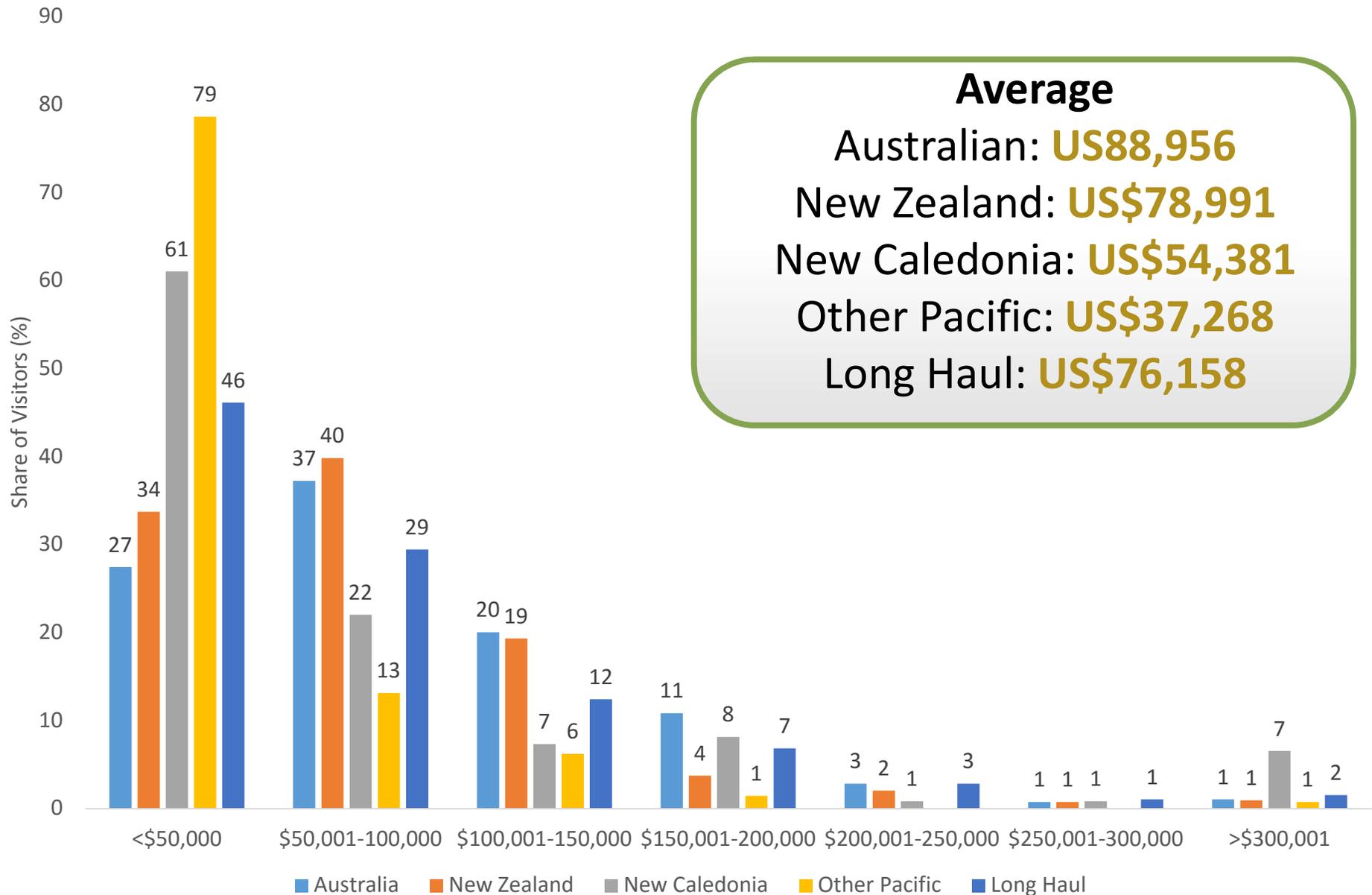
Top 3 Postcode Areas

2000	Sydney Central
4000	Brisbane
2031	Clovelly, Sydney

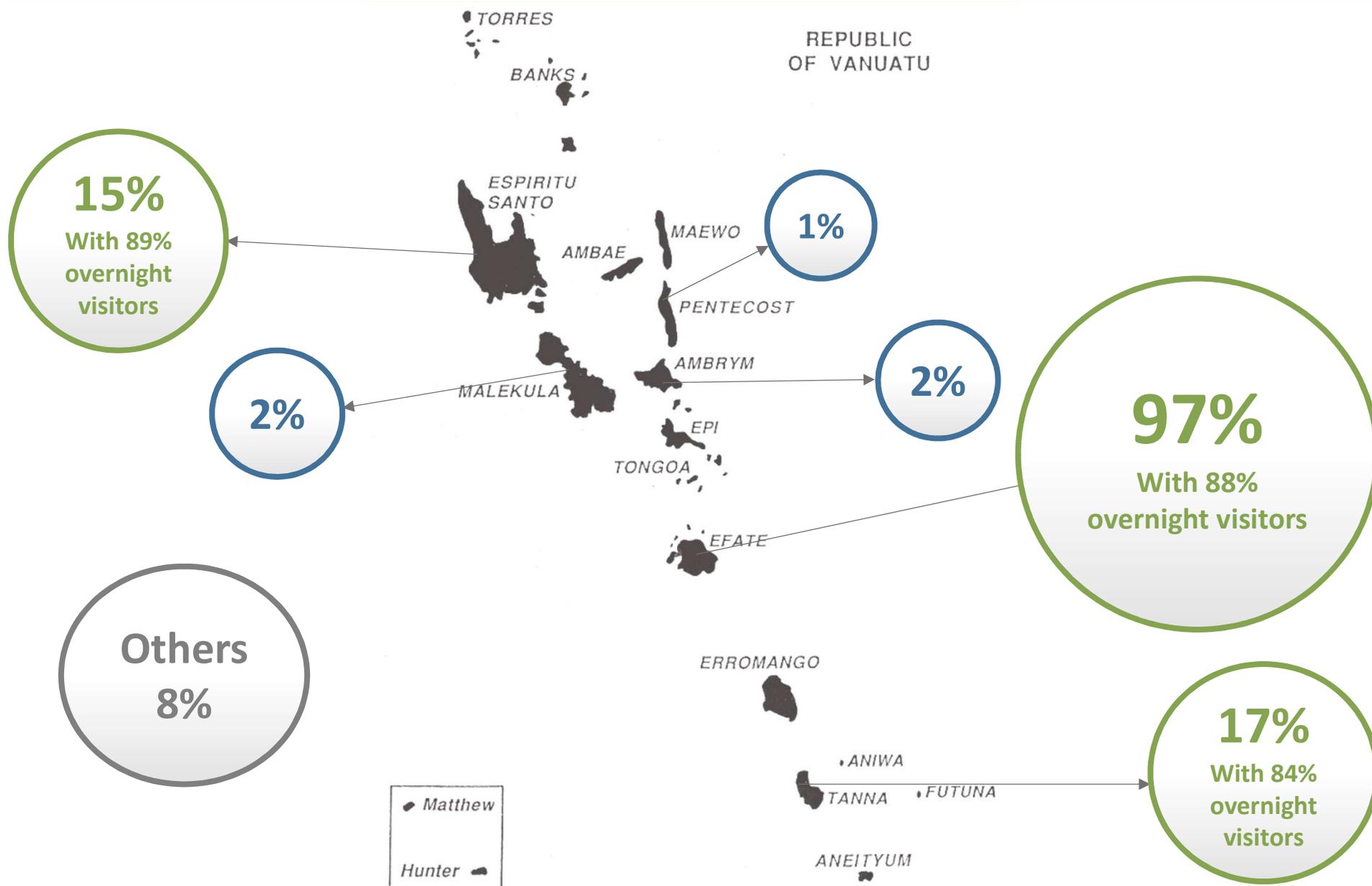
Heat Maps for New Zealand



Annual Household Income



Islands Visited



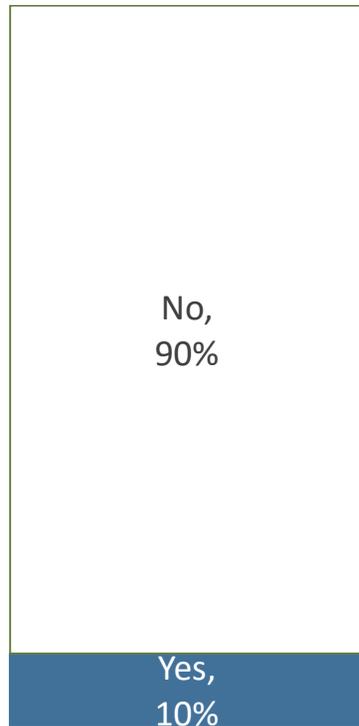
Airlines Used for Travel

Airlines	Total(%)	Holiday visitors only(%)	Australia(%)	New Zealand(%)	New Caledonia(%)	Other Pacific(%)	Long Haul(%)
Air Vanuatu	63	65	61	90	47	17	56
Virgin Australia	25	26	39	4	0	6	15
Fiji Airways	8	4	1	3	1	65	26
Aircalin (Air Calédonie International)	5	5	0	1	58	1	6
Qantas	4	4	6	0	0	1	4
Air New Zealand	3	2	0	11	0	0	2
Solomon Airlines	1	0	0	0	0	15	1
Other	2	1	1	1	1	5	6

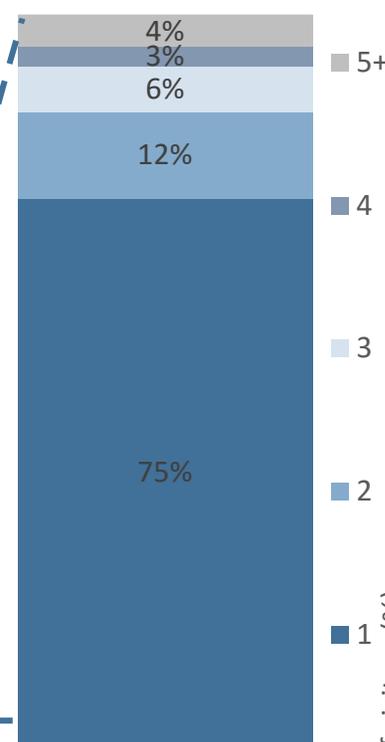
Note: Multiple responses, therefore total does not add up to 100%

Cruise visits to Vanuatu for holiday visitors only

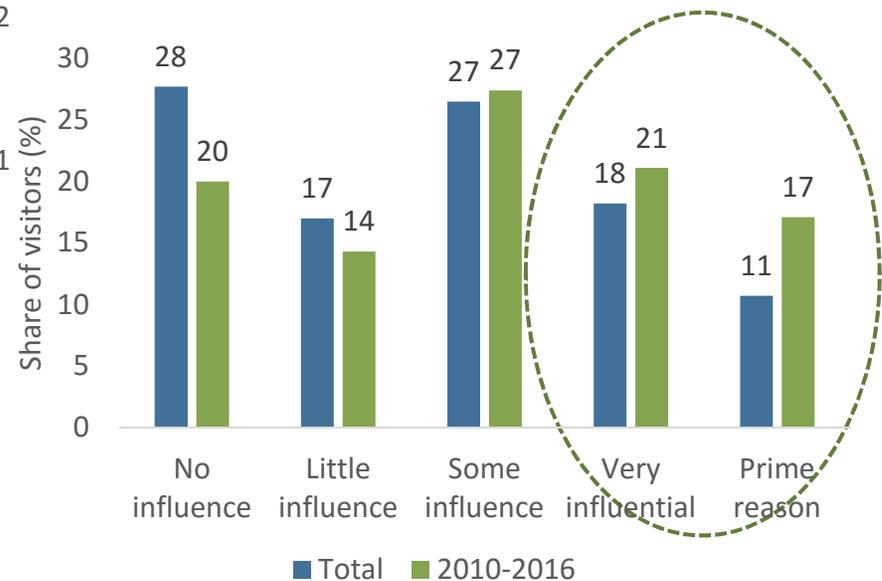
Been on a cruise to Vanuatu before?



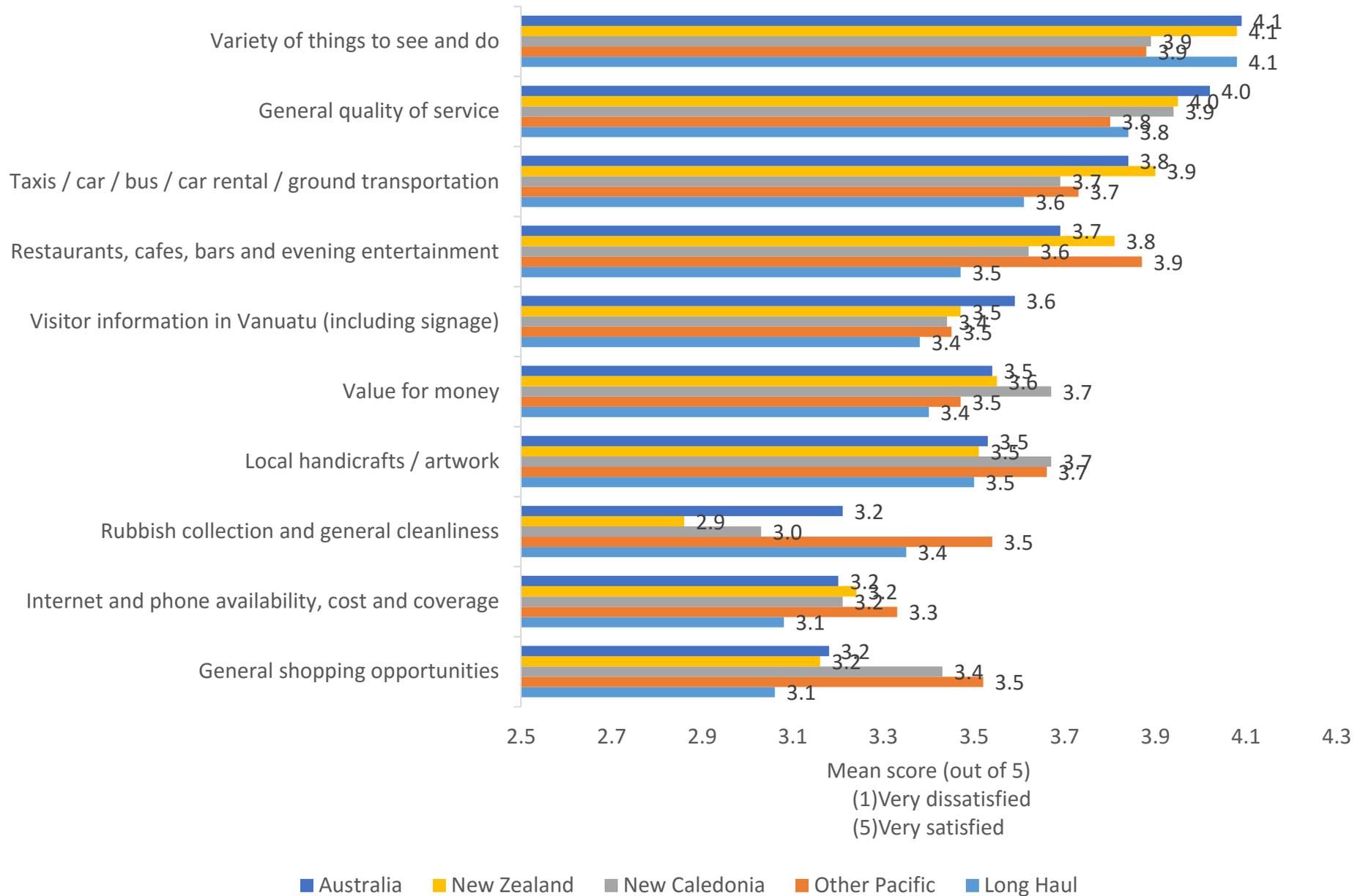
If Yes, how many times?



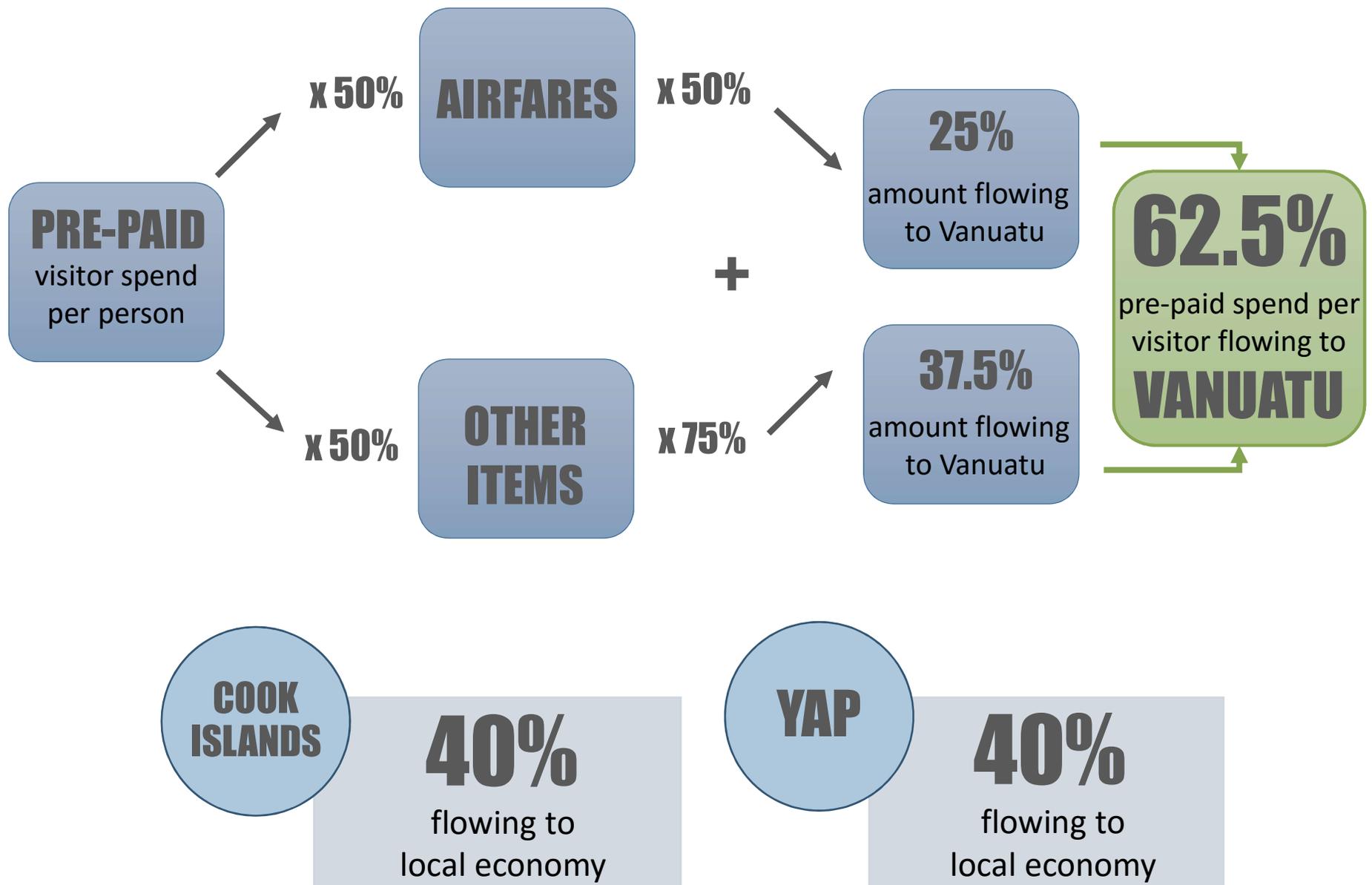
Did cruising before influence your decision to come back?



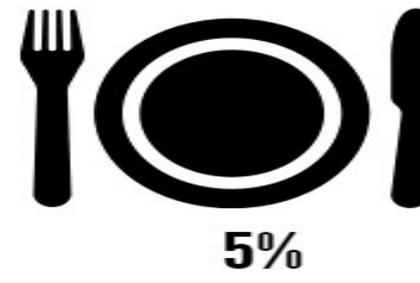
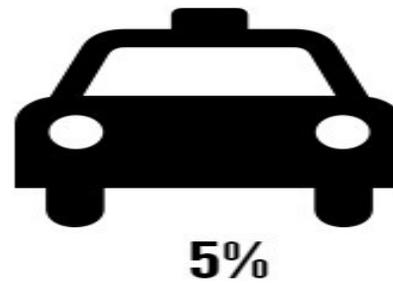
Degree of satisfaction with Vanuatu services



Prior to Arrival Visitor Expenditure



Breakdown of Pre-Paid Spend



Expenditure by Season

	Jan – Mar 2016	Apr – Jun 2016	Jul – Sep 2016	Oct – Dec 2016	Overall Average
Average Spend Prior to arrival					
Per Person - Whole Trip	\$1,142	\$1,266	\$1,344	\$1,284	\$1,274
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy					
Per Person - Whole Trip	\$714	\$791	\$840	\$803	\$796
Per Person per Day	\$82	\$87	\$92	\$91	\$88
Length of stay	8.7 nights	9.1 nights	9.1 nights	8.9 nights	9.0 nights
Average Spend while in Vanuatu					
Per Person - Whole Trip	\$730	\$746	\$754	\$691	\$730
Per Person per Day	\$84	\$82	\$83	\$78	\$81
Total spend flowing into Vanuatu economy – Whole Trip	\$1,444	\$1,537	\$1594	\$1,494	\$1,526
Total spend flowing into Vanuatu economy – Per Day	\$166	\$169	\$175	\$169	\$169

Expenditure by Visitor Type

	Holiday	Business	Meeting Family/Friends	Overall Average
Average Spend Prior to arrival				
Per Person - Whole Trip	\$1,241	\$1,525	\$1,051	\$1,274
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy				
Per Person - Whole Trip	\$776	\$953	\$657	\$796
Per Person per Day	\$92	\$123	\$55	\$88
Length of stay	8.4 nights	7.8 nights	11.9 nights	9.0 nights
Average Spend while in Vanuatu				
Per Person - Whole Trip	\$724	\$951	\$602	\$730
Per Person per Day	\$86	\$122	\$50	\$81
Total spend flowing into Vanuatu economy – Whole Trip	\$1,500	\$1,904	\$1,259	\$1,526
Total spend flowing into Vanuatu economy – Per Day	\$178	\$245	\$105	\$169

Expenditure by Market

	Australia	New Zealand	New Caledonia	Other Pacific	Long Haul	Overall Average
Average Spend Prior to arrival						
Per Person - Whole Trip	\$1,272	\$1,160	\$788	\$1,245	\$1,738	\$1,274
Flowing into local economy - Estimated 62.5% of the pre-paid spend flows into the Vanuatu economy						
Per Person - Whole Trip	\$795	\$725	\$493	\$890	\$1,068	\$796
Per Person per Day	\$92	\$81	\$72	\$109	\$98	\$88
Length of stay	8.7 nights	9.0 nights	6.9 nights	8.1 nights	11.1 nights	9.0 nights
Average Spend while in Vanuatu						
Per Person - Whole Trip	\$706	\$720	\$657	\$919	\$913	\$730
Per Person per Day	\$81	\$80	\$95	\$113	\$82	\$81
Total spend flowing into Vanuatu economy – Whole Trip	\$1,501	\$1,425	\$1,150	\$1,809	\$1,981	\$1,526
Total spend flowing into Vanuatu economy – Per Day	\$173	\$161	\$167	\$222	\$180	\$169

Expenditure in Vanuatu by Season

BY SEASON

Expenditure Items	Jan – Mar 2016	Apr – Jun 2016	Jul – Sep 2016	Oct – Dec 2016
Food & Beverage	24	26	29	25
Accommodation	21	19	19	20
Retail	8	8	8	8
Domestic travel within Vanuatu	7	5	6	5
Tours/Tour operator services	7	7	7	7
Local Transport	6	7	5	5
Entertainment, Internet & Service	5	6	4	4
Souvenirs	3	3	3	2
Duty free shop (alcohol, tobacco, cosmetics)	2	2	2	2
Total expenditure (US\$)	\$84	\$82	\$83	\$78

Expenditure in Vanuatu by Visitor type

BY VISITOR TYPE

Expenditure Items	Holiday	Business/ Conference	Meeting family/Friends	Honeymoon/ Wedding
Food & Beverage	28	36	14	20
Accommodation	20	44	9	16
Tours/Tour operator services	8	2	2	4
Retail	6	10	9	5
Local Transport	6	9	3	5
Domestic travel within Vanuatu	6	11	6	4
Entertainment, Internet & Service	5	6	4	4
Souvenirs	3	3	2	2
Duty free shop (alcohol, tobacco, cosmetics)	2	2	1	1
Total expenditure (US\$)	\$86	\$122	\$50	\$62

Most and Least Appealing Aspects

Most Appealing Aspects for First Time Holiday Visitors



Least Appealing Aspects for First Time Holiday Visitors



Most Appealing Aspects of Vanuatu

“Vanuatu is a beautiful place, pristine turquoise waters, beautiful beaches and swimming "holes" or spots but what is most captivating is the very humble and quiet nature of the Vanuatu people. I had a very short stay and perhaps did not fully get to experience Vanuatu for what it had to offer but for those few days, I was truly humbled and in awe!”



“I enjoyed the local people. I found everyone very friendly and helpful and easy to chat with.”

Most Appealing Aspects of Vanuatu

“Visiting Mt Erakor volcano on Tanna was a spectacular experience. Snorkelling off Tanna was great.”

“The water is crystal clear and we loved snorkelling straight off the beach. The food was mostly fresh and local and enjoyable. We found it the ideal place to really relax and switch off from the world.”



Least Appealing Aspects of Vanuatu

“Some of the roads were very difficult to drive on. More road maintenance to some of the resorts would make for a more comfortable trip.”

“The lack of signage was a problem, didn't know how to find places .”

“Prices are too high compared to the quality of the services provided.”



Least Appealing Aspects of Vanuatu

“They need to act on Rubbish Collecting. And keep this magnificent place intact and CLEAN.”

“I loved the snorkelling but the reefs are in bad shape. I spotted many crown of thorns star fish and there was evidence of bleaching. There needs to be a greater effort to protect Vanuatu's reefs.”

“Rubbish everywhere spoiling the natural beauty.”

