

# Tourist Accommodation Choice and Destination Development: The Case of Vanuatu

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## Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

Anna Addison

(Signature)

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Date: 11 November 2019

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Firstly, I would like to acknowledge the contributions from all the tourism stakeholders of the South Pacific islands for making a difference in the effort to advance social and economic development in the region. While working at Air New Zealand, I developed a passion for the South Pacific islands and realised the potential that they offer for travel and tourism. This research is just my small contribution to the sustainable tourism development of this region of the world.

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## **Abstract**

The accommodation choice made by visitors has a key role to play in tourism development, helping to shape visitors' impressions of the destination and their resultant impacts. Accommodation facilities are essential prerequisites for hosting tourists and can also facilitate and stimulate tourism growth in regions looking to bolster visitor numbers and tourism's economic impact. Investment in tourism accommodation also represents one of the largest areas of foreign and domestic investment in many developing nations.

There is limited literature addressing the role that accommodation choices play in destination development and this is particularly the case in the developing island nations of the South Pacific. This thesis focuses on the characteristics of visitors associated with different types of accommodation in Vanuatu. The accommodation sector in the nation is undergoing considerable development, and important decisions are being made about the type of accommodation that will underpin tourism development in the future. The thesis reviews the current accommodation structure in Vanuatu and provides a detailed insight into the visitor characteristics associated with accommodation choice. The thesis adds an important new dimension to understanding tourism development in Vanuatu. It also develops visitor profiles associated with different accommodation types and these will be of value to communities, business and government as they engage in planning future tourism development.

The data upon which the thesis is based are drawn from the Vanuatu International Visitor Survey (IVS) (2015–17). The thesis reviews demographics and visitor spend and behavioural characteristics of visitors with a largely quantitative and descriptive analysis of the data. The research then delves into the qualitative dimensions of the Vanuatu IVS, exploring, particularly, aspects of visitor satisfaction. NVivo software was used to conduct the review of the qualitative data.

Visitor profiles are developed and presented based on the Vanuatu Department of Tourism's accommodation classifications. Resorts, including Boutique accommodation, were the most popular accommodation choice for holidaymakers. The average spend for those staying in Resorts was US\$195 per person per day and the Boutique visitor had the highest expenditure across all types at \$291 per person per day. The Guest House and Island Bungalow group visited the outer islands significantly more than any other

groups, and had an average daily spend of US\$164 per person. Those staying in Hotels (comprising both regular and corporate hotels) were predominantly visiting for business and conference purposes and spent, on average, US\$232 per person per day. The Motels group includes self-contained accommodation; this group's average length of stay was 8.9 days, with an average daily spend per person of US\$168.00. The Multi-type group is a combination experience reflected in the other groups, and these visitors had an average daily spend of US\$188.00 per person.

Insights into the characteristics of visitors associated with different types of accommodation can inform development decisions such as which locations and accommodation types to invest in. This research provides Vanuatu's tourism industry and the Vanuatu Government with insights into the effects that existing and future accommodation development can have on visitor profiles and broader development outcomes. The research provides an important baseline for future comparative work. The ability to review IVS data over time will direct governments and investors how to best cater for evolving visitor demand and meet community needs.

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## **Glossary of Abbreviations**

ACP	African, Caribbean and Pacific countries
DFAT	Department of Foreign Affairs and Trade (Australia)
DoT	Department of Tourism (Vanuatu).
IVS	International Visitor Survey
NTO	National Tourism Organisation
NZTRI	New Zealand Tourism Research Institute
PICS	Pacific Island Countries
PNG	Papua New Guinea
SDGs	Sustainable Development Goals
SPC	South Pacific Community
SPTO	South Pacific Tourism Organisation
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organisation
VFR	Visiting friends and relatives
VHRA	Vanuatu Hotel and Resorts Association
VIBTA	Vanuatu Island Bungalow and Tourism Association
VNSO	Vanuatu National Statistics Office
VSO	Volunteer Services Overseas
VSTAP	Vanuatu Strategic Tourism Action Plan
VTO	Vanuatu Tourism Office
VTOA	Vanuatu Tour Operators Association
WTTC	World Travel and Tourism Council



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# Chapter 1: Introduction

## *1.1 Research Background*

The islands of the South Pacific are scattered across great expanses of the ocean. Their small populations and limited resources mean that their economies are heavily reliant on other national economies and thus need to be planned and managed carefully. Tourism as a vehicle for economic development has been highlighted by world economic authorities as being a critical tool to stimulate sustained economic development to islands in the region: “In 2040, transformational tourism opportunities could bring an additional US\$1.7 billion in revenue and 116,000 jobs” (World Bank, 2016, p. 4).

Since the late 1990s, the majority of Pacific island nations have embraced tourism as a key, if not the main, economic sector. Tourism strategy is influenced by tourism planners, donor agencies and global organisations and governments such as the World Bank, Asian Development Bank, Australia and the People’s Republic of China. Their respective approaches have tended to emphasise sustainable development and the generation of local economic benefits (Government of Vanuatu, 2004; South Pacific Tourism Organisation, 2014; United Nations Development Programme (UNDP), 2008; United Nations World Tourism Organisation (UNWTO) (2014a, 2014b). Their approach has created a focus on generating more opportunities for local communities while protecting environment and culture, with the aim of improving local quality of life (Asia Development Bank, 2008; South Pacific Tourism Organisation, 2014). The challenge for the people of the Pacific is how to manage and develop the tourism industry in such a way that it can be a sustainable source of livelihood for future generations, without degrading their quality of life or the natural and cultural resources upon which they depend (Becken, 2005; Milne, 2013).

Tourism destinations face many challenges as they attempt to not only reach the elusive visitor but also chart a course towards more sustainable forms of economic development. Pacific Island countries (PICs) need more sustainable forms of tourism development that can further contribute to their national economies and the well-being of their populations. The list of tourism development priorities is long and includes the need to retain air transport linkages, build important infrastructure and roading, and manage the environmental and cultural resources upon which tourism depends, as well

as the critical issue of improving the governments' awareness of tourism and its impacts.

One often overlooked factor influencing the tourism development process in PICs is the importance of accommodation investment, development and management. Provision of appropriate and quality accommodation is essential for any tourism destination.

Accommodation dominates land-based tourism products in PICS and decisions made on what type of accommodation development to promote and pursue will have a lasting impact on the type of visitors who come to the destination in the future. As Sharpley (2000) notes: "The qualitative and quantitative characteristics of the supply of accommodation services directly influence the type of tourism/tourists attracted to destination areas" (p. 276). Thus, well-targeted accommodation supply is a significant factor in tourism development planning.

The accommodation segment is the largest subsector of the tourism economy (Cooper et al., 1998) with accommodation accounting for approximately one third of total trip expenditure (Goss-Turner, 1996). The visitor is attracted to destinations that can offer a variety of accommodation options that are both appealing and offer a quality service.

Destinations that plan the development of the accommodation sector gain long-term benefits as a visitor's decision to travel to a particular destination is based significantly on the reputation of the services offered by the accommodation operators (Kelly & Nankervis, 2001). A tourism destination's overall success is inextricably intertwined with the growth and development of the accommodation sector (Sharpley, 2000), and the lack of accommodation, or inadequacy in quality, may dissuade visitors (Goodall, 1989; Sharpley, 2000).

The accommodation sector is also susceptible to a range of unanticipated external influences such as natural disasters, political conflicts and economic downturns (Malhotra & Venkatesh, 2009). These issues are particularly relevant to PICs, where natural disasters can destroy an island's infrastructure and accommodation facilities, as occurred in Efate, Vanuatu, during Cyclone Pam in 2015. Such occurrences obviously affect visitor perceptions but also necessitate accommodation reinvestment – reinforcing again the need to think strategically about future needs and challenges.

There is a clear gap in the literature regarding the impact that tourism accommodation choices have on levels of visitor satisfaction and the broader impacts of visitors on host

destinations. The visitor needs to be better understood and initiatives taken to overcome the lack of evidence upon which to base tourism strategy and policy-making.

Governments and donor agencies need to know more about the impacts associated with visitors who stay in the different accommodation types.

By analysing visitor characteristics associated with different accommodation choices, this thesis aims to provide a series of visitor characteristics and profiles that can assist in better understanding the impact of accommodation investment and development decisions on the future of Vanuatu.

Like many other PICs, Vanuatu is turning increasingly to tourism to provide economic opportunities for its people. Rex (2019) noted that: “The current *2030 Vanuatu Tourism Market Development* plan sets a target of 300,000 holiday visitors by 2030, equivalent to sustainable visitor growth annually of 10–12% from its source markets including Australia, New Zealand, New Caledonia, China, Europe and North America.”

Other key goals of the Plan are to:

- Increase visitation and dispersal of visitors beyond Efate by developing new market segments such as ‘Adventure Seekers’ to improve visitor dispersal to outer islands, with a target of 30% of total visitors moving beyond Efate during their stay including developing some unique accommodation facilities on the outer islands.
- Create sustainable tourism business opportunities for all.
- Increase local employment opportunities in the tourism sector. (Rex, 2019)

Adela Issachar Aru, Chief Executive of the Vanuatu Tourism Office, notes that:

“It is important to also reiterate that tourism is not just about economic gain. Tourism is also about sharing our culture, our kastom and our environment with our visitors. It is crucial that these unique features are at the forefront of any visitor experience. The image that Vanuatu presents to the world through its tourism marketing will proudly share these messages as we ask visitors to ‘Answer the Call of Vanuatu’.” (Rex, 2019)

There are several areas in which there is scope for further tourism development in Vanuatu, especially in infrastructure improvement, accommodation investment and environmental management. The impacts of these various factors on visitor trends and

overall visitor experience and satisfaction need to be realised. Accommodation investment and development is key to tourism growth in the outer islands.

Gaining insights into characteristics such as visitor demographics and visitors' satisfaction with their experiences in Vanuatu and creating profiles of visitors associated with different accommodation choices can help with ensuring sustainable tourism development, improving the overall contribution of the tourism sector to the national economy, and more effective planning for the future.

### *1.2 Research Objectives*

The specific objectives of this research are to:

- review the current structure of accommodation offerings in Vanuatu
- provide detailed insights into the characteristics of Vanuatu visitors associated with different accommodation types
- develop profiles of visitors based on their accommodation choices
- contribute to the academic literature on PIC tourism and highlight the importance of understanding the visitor characteristics linked to accommodation choice
- provide information to the Vanuatu Government, the tourism industry and other stakeholders to assist their future planning for the industry.

### *1.3 Research Context*

Vanuatu is located in the south-west region of the Pacific Ocean (Figure 1.1). The country comprises 83 islands, with an ocean area of 612,300 square kilometres and a total land area of 12,280 square kilometres (Vanuatu National Statistics Office (VNSO), 2009b).

**Figure 6.1 General map of the Pacific**



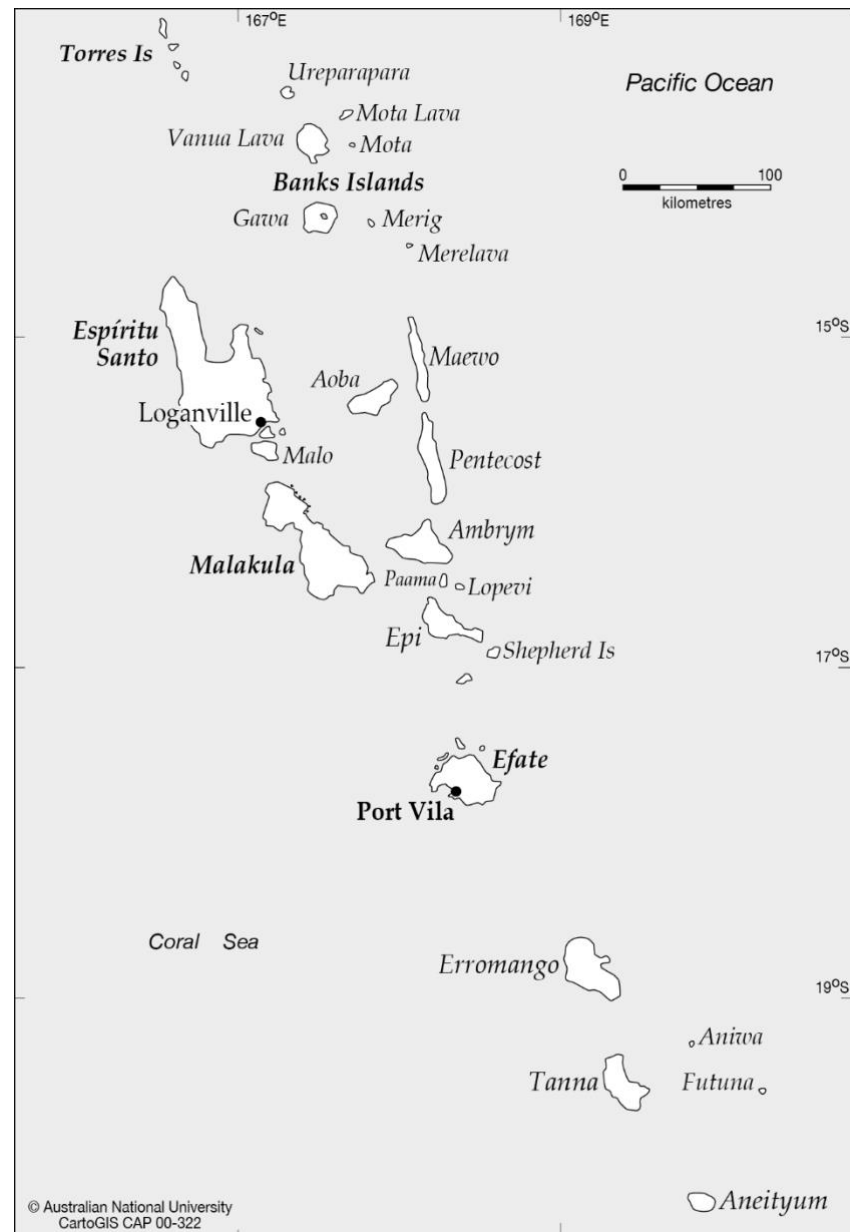
*Source:* CartoGIS Services — ANU, 2017.

The capital and economic centre of Vanuatu is Port Vila, located on the island of Efate (Figure 1.2). The Vanuatu population is concentrated in Efate. The last mini-census conducted by the Vanuatu National Statistics Office (VNSO, 2017) showed the total population of the country as 272,459 people, with the main island, Efate, the residence for 86,402 people, or 31.7% of the total population.

Vanuatu's overall economic growth in GDP between 2016 and 2017 was 5.7% and reflected policy reforms, improvements in tourism and air transportation infrastructure, and general economic recovery after the economy was badly damaged by Cyclone Pam in early 2015 (Vanuatu Tourism Office, 2018). The government has maintained Vanuatu's pre-independence status as a tax haven and international offshore financial centre. In addition, Vanuatu receives very high levels of international aid (Scheyvens & Russell, 2013; Vanuatu National Statistics Office, 2017; Vanuatu Tourism Office, 2018), which translates to net official development assistance of US\$478 per capita (World Bank, 2019).



**Figure 1.7 Map of the Republic of Vanuatu**



Source: CartoGIS Services — ANU, 2017a

Vanuatu is a growing tourism destination. It received 115,634 air arrivals and 234,567 cruise ship excursionists during 2018, representing a 5% and 4% increase, respectively, from 2017 levels. The World Travel and Tourism Council (2017) reported that tourism in Vanuatu contributed 18.2% to GDP, or \$16,343.6 million in value in 2017.

The tourism industry in Vanuatu has been recovering since 2015's Cyclone Pam, a category five cyclone which devastated the whole island. In an event unrelated to the cyclone effects, the rehabilitation works planned to upgrade the runway at Bauerfield airport were delayed in 2016. That issue led to the withdrawal of Air New Zealand and other air services to Vanuatu, resulting in a decline in air arrivals (Vanuatu Tourism

Office (VTO), 2018) not only from the New Zealand market but also from other source markets (Vanuatu Tourism Marketing Plan 2030). Given the current stage of recovery and progress in various infrastructure development projects, including the upgrading of Bauerfield airport and the drive for both overseas and domestic investment in the accommodation sector (Vanuatu Tourism Office, (VTO), 2018), it is timely to gain a deeper understanding of the types of visitor associated with various forms of accommodation.

Visitor accommodation in Vanuatu is largely restricted to three main locations, with 358 accommodation establishments in 2018 (VTNO, 2018). Accommodation choices are dictated by the availability of transportation and sufficient infrastructure, specifically in Efate, Tanna and Santo. The Vanuatu Government plans to expand and improve transportation, infrastructure and overall tourism investment to the outer islands; in particular, to Tanna and Santo (Department of Strategic Policy, Planning and Aid Coordination, 2018).

#### *1.4 Thesis Structure*

The thesis comprises seven chapters. The current chapter provides a broad introduction to the research focus for the thesis in the context of South Pacific tourism and with a focus on Vanuatu as a tourism destination. It describes the pivotal role of accommodation facilities in tourism development and the need for a better understanding of the visitor characteristics associated with various accommodation choices.

Chapter 2 reviews the literature on tourism development in the South Pacific region with a focus on theoretical approaches to understanding tourism development and its outcomes. Various tourism development models are examined with an emphasis on approaches since the 1980s. The chapter also reviews literature on regional tourism development trends, the current status of tourism in the South Pacific, the economic impacts of tourism, and the role of accommodation in destination development for the region.

Chapter 3 discusses the methodological approach adopted in this thesis. The chapter commences with an overview of the philosophical foundations that underpin the study. The International Visitor Survey (IVS) from which the data is drawn is then introduced.

The chapter then focuses on the thematic analysis conducted on the qualitative data generated from the IVS using NVivo software.

Chapter 4 describes Vanuatu as a tourist destination. Historical developments are traced up to the current status of the tourism industry. There is specific attention paid to the accommodation sector. The chapter examines the form and structure of the Vanuatu tourism industry, the economic impacts of tourism in Vanuatu, and the current strategies in place to encourage further development.

Chapter 5 presents the research results from the quantitative data obtained from the IVS survey period 2015–2017. It presents a range of the characteristics of visitors who stay at various types of accommodation in Vanuatu, including visitor demographics, accommodation preferences, factors influencing visitor decision-making about Vanuatu, visitor expenditure and visitor satisfaction.

Chapter 6 focuses on the qualitative IVS data, examining themes that emerged from respondents' comments on the most and least appealing aspects of their time in Vanuatu, together with suggestions for improvements. The focus is on conveying an understanding of how these themes are linked to accommodation choice.

Chapter 7 reviews and synthesises key findings and presents profiles of visitor types generated by the research, based on accommodation choice. The study's contribution to the literature is then outlined, followed by a presentation of recommendations for further research.

## Chapter 2: Literature Review

This chapter reviews tourism development in the South Pacific region in the decades since the late 1970s. It discusses how the Pacific Islands continue to “leverage for tourism the attributes that have imbued them, including appeals to their cultural, geographical, and climatic allure” to create economic opportunities for the host population (Cheer et al., 2018, p. 1).

Indeed, the notion of tourism as a vehicle for future economic development has been highlighted with the World Bank (2016, p. 4) stating that “in 2040, transformational tourism opportunities could bring an additional US\$1.7 billion in revenue and 116,000 jobs” to PICs. This projected growth depends on development plans instigated by national governments, industry and aid partners to facilitate the sustained generation of benefits from tourism. The need for more investment in tourism, infrastructure and core accommodation is critical for the region and the literature review focuses on one key area in particular: decisions on what types of accommodation to develop and promote and how these, along with attendant visitor choices, may influence tourism development outcomes.

### *2.1 Regional Tourism Development Trends*

The post-WWII economic history of small islands in the Pacific region has been marked by two favourable development factors: the march of decolonisation and the spread of international tourism (McElroy, 2003). The islands have many geographic, climatic and ethnic similarities but diverse colonial pasts, which is significant in explaining why their tourism industries have developed at such widely varying rates (Douglas, 1997; South Pacific Tourism Organisation, 2017b). Colonialism and the influence of foreign powers, mainly Britain and France, Australia, New Zealand and the USA, is still evident in the form of bilateral tourism links (Harrison, 2004). The top three South Pacific destinations are Fiji (a former British colony), with more than 39% of all regional tourism arrivals, French Polynesia (still a French territory) at 9.3%, and the Cook Islands (self-governing in free association with New Zealand) at 7.5% (South Pacific Tourism Organisation, 2017a).

To a great extent, tourism development, transport links and investment flows reflect these traditional alliances, with, for example, French travellers visiting French overseas

territories and New Zealanders being the predominant group visiting the Cook Islands and Niue (Cheer et al., 2018). Decolonisation from the late 1960s resulted in several independent states, like Fiji, Vanuatu and the Cook Islands, ending up with infrastructure, international airports and core accommodation facilities in capital towns, built initially by foreign investors through land ownership or leased land from the colonial days. In contrast, other island nations like Samoa and Tonga largely started from scratch in terms of building tourism infrastructure and facilities and faced years of building basic infrastructure (de Deckker, 1997).

Kissling (2002) studied air connectivity in several Pacific island destinations from 1989 to 2002. He found that most islands had undeveloped airport infrastructure and inadequate bilateral air services rights, and so could offer only limited aircraft capacity, which had curbed expansion of tourism and hotel room capacity. Yacoumis (1989) noted that key infrastructure constraints, lack of investment, especially in accommodation, and political instability in the region continued to hold back development in the islands. Their small size, limited resource bases, globalisation and issues with airline routes continue to reinforce economic marginalisation of small island states (Cheer et al, 2018).

Current regional tourism plans throughout the South Pacific islands reveal varying stages of infrastructure development challenges and issues (World Bank, 2017b). Pacific Island countries are now better connected than ever via telecommunications with a number of recently completed internet cables. However, PICs also face unique development challenges in that they remain far from major markets, spread across many islands and with limited population bases. Most of these PICs are also at the forefront of climate change impacts — they are highly vulnerable to natural disasters including severe weather events (Secretariat of the Pacific Regional Environment Programme (SREP), 2017).

Despite questions being raised by several commentators concerning the slow pace of tourism development impacts on some Pacific Island nations (Milne, 2013), the enthusiasm of multilateral agencies to promote tourism has not been dampened. With largely narrow economic bases, PICs have little choice but to seek further development of tourism (Cheer et al, 2018).

This faith in tourism development is driven by the fact that tourism is one of the world's largest economic sectors – it creates employment and generates wealth across the globe.

The sector, comprised of a wide range of service providers, aims to serve and support international and domestic leisure and business visitors.

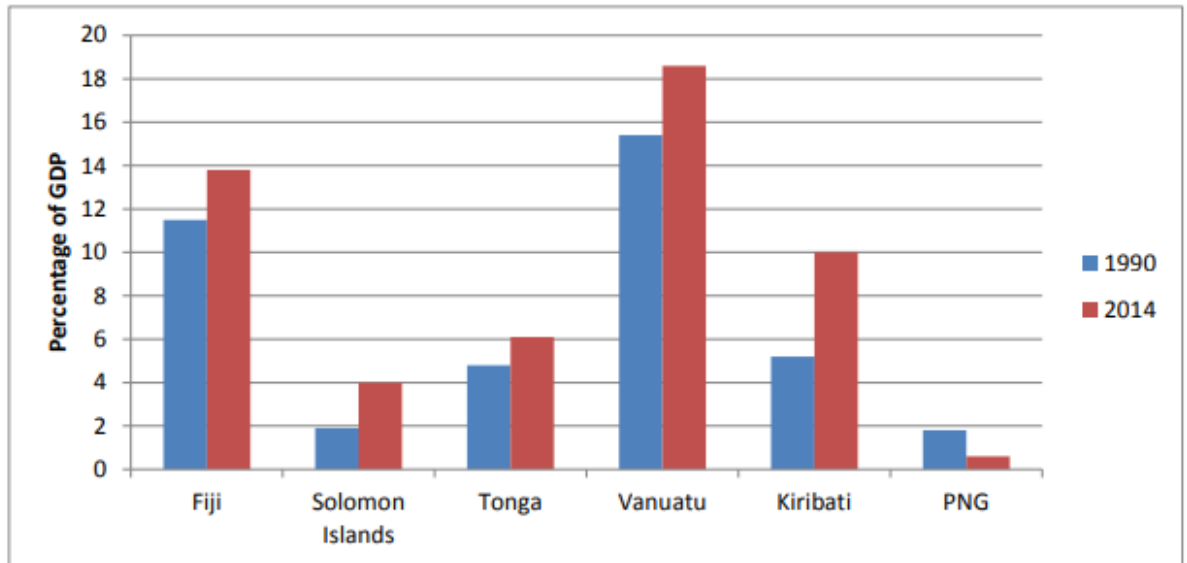
The World Travel and Tourism Council's (WTTC) 2018 report, which analyses the economic impact of travel and tourism in 185 countries and 25 regions, reveals that the sector accounted for 10.4% of global GDP and 319 million jobs, or 10% of total employment, in 2018. The holiday market represented 78.5% of visitor expenditure, compared with 21.5% spent by the business market. The tourism sector accounted for 6.5% of total global exports and 27.2% of total global service exports. The ongoing increase in the number of middle-class households and the strong growth in global consumer spending once again enabled the tourism sector to reach 3.9% annual growth, outpacing the global economy for the eighth consecutive year. The Asia-Pacific region remained a strong performer with a growth rate of 6.4% in 2018 (World Travel & Tourism Council, 2019, Foreword). According to the WTTC 2019 report, the tourism sector will become more critical as an engine of economic growth and a vehicle for sharing cultures and understanding.

The impacts of tourism are typically assessed across economic, social, cultural and economic measures (Agyeiwaah, McKercher, & Suntikul, 2017). A dearth of reliable and relevant longitudinal data makes assessing tourism impacts in PICs inexact and challenging (Cheer et al, 2018). Singh, Milne & Hull (2015) references discussed with SPTO members some of the challenges of collecting data in the region. He reminded Pacific stakeholders of the continual need for data gathering and analysis as an important tool to support decision-making by tourism planners. High economic leakages, a lack of financial and human resource capacity, and high levels of foreign ownership are well-documented issues that can diminish the economic contribution of tourism to advances in national development in PICs (Milne, 1992). Pratt (2015) demonstrated that the key to increasing tourism's contribution to economic development is the curtailing of the extent of economic leakages.

Tourism's direct contribution to GDP reveals the sector's relative importance to the Pacific economy. Figure 2.1 demonstrates that between 1990 and 2014, Fiji, Solomon Islands, Tonga, Vanuatu and Kiribati all saw increases in the tourism share of their country's GDP. Only Papua New Guinea (PNG) showed a relative decrease in the tourism sector's contribution, and this was partly due to faster growth in other sectors of

the economy and the relative stagnation of leisure travel to the country (World Bank 2017a).

**Figure 2.1 The direct contribution of tourism to GDP in selected islands**

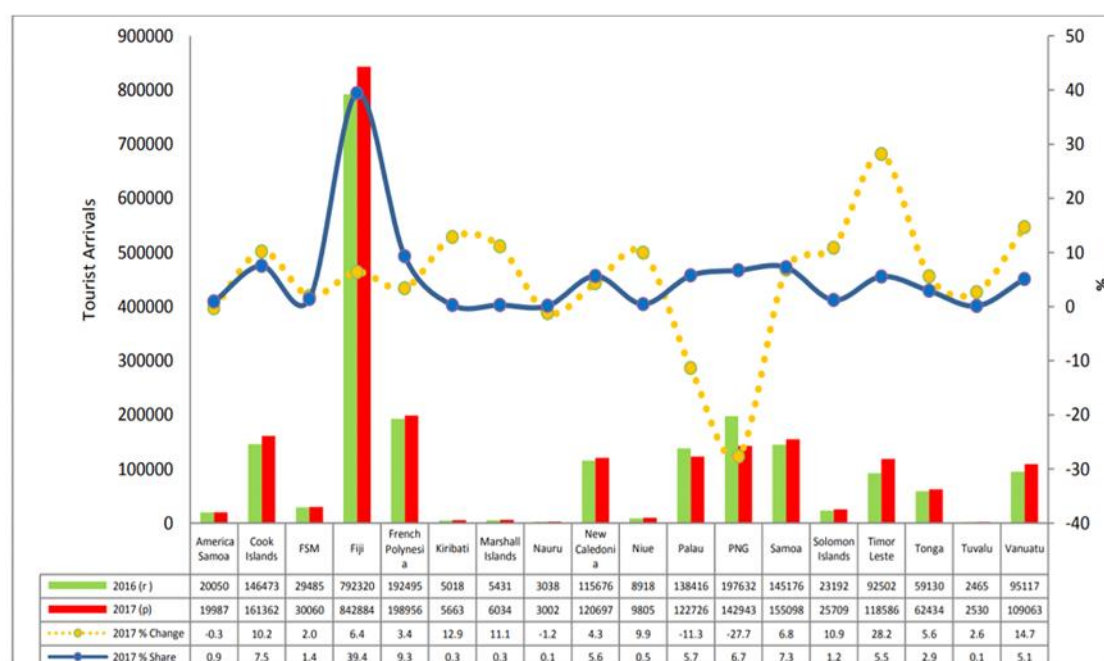


*Source:* Perrottet and Garcia (2016).

South Pacific destinations with air transportation linkages and associated infrastructure in place, including developed accommodation facilities, have recorded the highest growth figures. In its Tourism Highlights report, the United Nations World Tourism Organization (2018) stated that there were 2.1 million air visitor arrivals to the Pacific countries in the ACP group of states and SPTO member countries in 2017, generating earnings of US\$3.6 billion.

These air arrivals represent more than 3% growth from 2016, or 65,000 more air tourists. The growth, according to the South Pacific Tourism Organisation (2017a), was triggered by sustained travel demand in key source markets, increased air-connectivity and improved infrastructure developments during the year. Double-digit growth was recorded for the Cook Islands, Kiribati, Niue, Timor Leste, the Solomon Islands and Vanuatu. Australia and New Zealand continued to top the source markets with more than half of the air arrivals to the region. The USA was the third highest source market at 10%, with Europe and Other Asia at 8.9% each, Other Pacific Islands generate 7.5% of air arrivals, and China 6.1%; all other markets account for the remaining 7.7% share (South Pacific Tourism Organisation, 2017b). (See Figure 2.2.)

**Figure 2.2 Tourist arrivals to Pacific countries in the ACP group of states and SPTO member countries in 2017**



Source: SPTO (2017b).

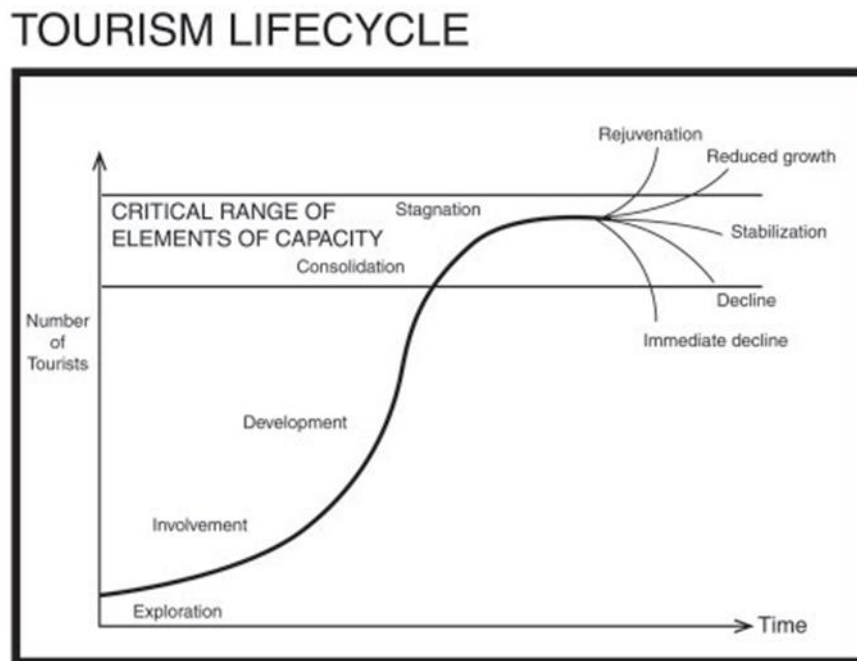
## 2.2 South Pacific Tourism Development Models

In reviewing the status of tourism development in the region, one is mindful of the fact that while the PICs have many geographic, climatic and ethnic similarities, they are also characterised by important differences. Their diverse colonial pasts have been significant factors in explaining why their tourism industries have developed at such widely varying rates (Douglas, 1997).

Attempts to understand the development of tourism in the region have been borrowed from a number of approaches. Butler's (1980) influential model of the tourism life cycle examines the way tourist destinations and resorts grow and develop over time and in relation to the changing demands of the tourist industry. The Butler Model (Figure 2.3) describes five stages in tourist destination development: discovery, growth and development, success, problem/stagnation, and rejuvenation or decline.



**Figure 2.3 The Butler Model of Tourism Area Lifecycle Model**



*Source:* Butler (1980, p. 6).

In the discovery phase, a region or island is “explored” or “discovered” by a small number of people who later tell others about their experiences. In time, other people visit and the local people make the most of the new economic opportunities by providing services to meet their needs. During the growth and development phase, more tourists arrive, having heard about the location by word of mouth. The growth in tourists leads to the building of new hotels, restaurants and shops, as well as the development of the services required. As more people visit the new destination, the facilities are fully utilised and mass tourism replaces the original economic base of the area. This success phase can cause resentment among local people who have not benefited from tourism or because of the loss of distinct local identity, with their culture diminished by the introduction of international influences.

Over time, visitors can lose interest in a tourism destination because the original natural environment has been changed and local resentment leads to negative experiences that can drive visitors away. This results in a period of stagnation, with economic decline in the area and the under-utilisation of tourist infrastructure, leading to business closures and a rise in unemployment. In the final phase, the tourist resort might continue to decline, or it might rejuvenate itself by developing strategies that are more sustainable, based on lower visitor numbers.

In the South Pacific region, traces and patterns of the Butler model's early stages have been noted (Harrison, 2004; McElroy, 2003), but a number of concerns were raised over the model not being considered to be a good fit. Douglas (1997) used Butler's model as a framework on which to develop a comparative tourism development history of Papua New Guinea, the Solomon Islands and Vanuatu, and concluded that even though the three island nations have many geographic climatic and ethnic similarities, their colonial pasts have been significant factors in explaining why the three countries' tourism sectors have developed at such widely varying rates. Recent factors such as improved aircraft technology and infrastructure development play a significant role in boosting tourism arrivals and investments (Harrison, 2004; McElroy, 2003). Likewise, the stubborn persistence of local ownership and limited growth of mass tourism in some settings call into question the projected progression outlined by the Butler's model.

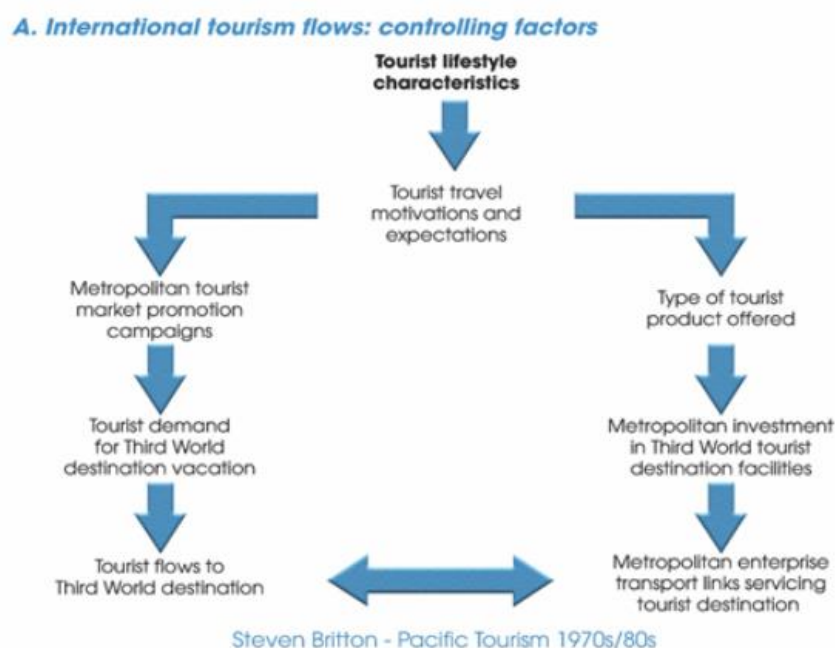
Issues and constraints facing tourism development in the Pacific Islands have been discussed at length by others (Britton, 1987; Fletcher & Snee, 1989; Harrison, 2004; Milne, 1992; Ryan, 2001; Tourism Council of the South Pacific, 1997). The main issues and constraints include limited natural resources, small economies, poor accessibility, lack of hotel rooms, and communal ownership of land in some islands. All these factors have been exacerbated by outward migration (Britton, 1981).

Britton (1981) applied dependency theory to tourism development in the South Pacific region. Dependency theory is an approach to understanding economic underdevelopment that emphasises the constraints imposed by the global political and economic order. Andre Gunder Frank (1991, 1998), the leading dependency theorist of the time, suggested that lack of development in third world nations is caused by core Western nations having deliberately created an "under development" of the periphery. Thus, underdevelopment is mainly caused by the peripheral position of colonial and post-colonial countries in the world economy.

In his model of dependent tourism development, Britton (1981) argued that tourism development, such as in the case of Fiji and other neighbouring islands, appears to have been grafted onto a once-colonial economy in a way that has perpetuated deep-seated structural anomalies and inequalities. Britton argues that the main motives for travel originate with metropolitan lifestyles, market positioning and the types of products offered, along with investment from the metropolitan countries. Subsequently metropolitan tourist companies act as wholesalers and agents who arrange packaged

travel to the destination using metropolitan carriers (aircraft and cruise ships). Thus, travel for leisure from the surrounding metropolitan countries to the peripheral PICs results from the shaping of demand by dominant external forces rather than anything to do with the host destination in terms of investment, marketing, incentives and culture (Figure 2.4). This means that large foreign-owned or linked businesses, including hotels, will tend to dominate over time.

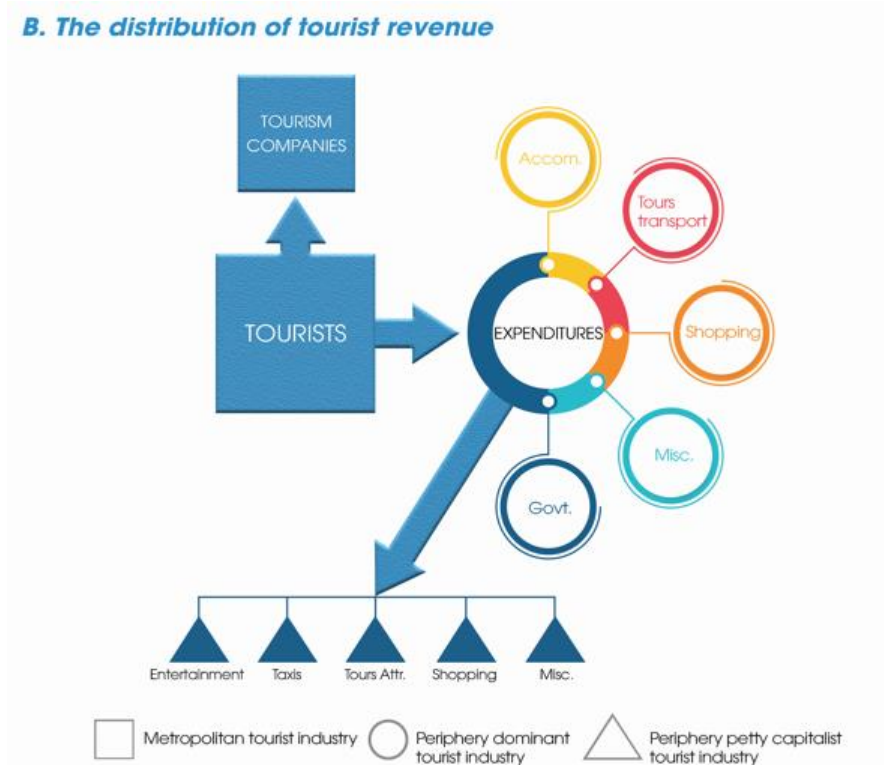
**Figure 2.4 Britton's 1981 Model of Dependent Tourism Development – Part One**



*Source:* Milne (1987, p. 10).

We can use Figure 2.5 to examine how this shapes underdevelopment in Fiji. The pattern of externally developed visitor demand and packaging of the destination “product” means that a considerable amount of money does not even reach the country. When money does reach Fiji from the visitor, it tends to flow to the periphery dominant industry which is often characterised by overseas ownership or close links to overseas experience and financing. In the end only the “crumbs from the table” reach the local periphery petty capitalist operators – the local taxi drivers, small business owners and restaurateurs who are not part of the global tourism system (Britton, 1983).

**Figure 2.5 Britton's 1981 Model of Dependent Tourism Development – Part Two**



*Source:* Milne (1987, p. 10).

While Britton's model has many relevant features and certainly opened eyes in the region to the importance of understanding global processes in influencing local tourism development in PICS, the work has been criticised on a number of fronts (Milne, 2013). Britton's work evolved before the advent of the internet. In recent decades, the small operators of the PICs have turned to the internet to raise awareness of their offerings and to "level the playing field" of tourism marketing. Indeed, development agencies have actively promoted information technology-focused solutions to enhancing the visibility of locally owned small and medium enterprises. Britton's model can also be critiqued for the fact that, like Butler's work, it struggles to present a way out of the vicious cycle of tourism development. In effect, it shows the PICs as somewhat helpless victims awash in a sea of global tourism. There is limited attention paid to the ways in which these nations can control their own destiny and how the very specific nature of PIC colonial histories may shape tourism and its links to economic development (Milne, 2013).

The need to have greater local context has led some tourism researchers to embrace elements of the MIRAB model, developed in the mid-1980s by New Zealand economist Geoff Bertram and geographer Ray Watters. MIRAB focuses on the unique economic

dimensions that characterise many of the small PICs; migration (MI), remittances (R), substantial foreign aid (A) and a very heavy dependence in terms of formal sector employment on public bureaucracy (B).

This model of modern economic development was identified as existing in a number of small Pacific Island countries, namely the Cook Islands, Niue, Tokelau, Kiribati and Tuvalu, emerging from the colonial era with a common heritage of colonial welfarism. The model identifies historical stages of economic development (or lack of it), starting with the evolution of colonial influences and how they affect, mould and infiltrate the local small economies. It notes the preoccupation and concern of the past colonial powers that small states need to ensure political sustainability before embarking on “internal” economic growth stages. These islands are very small (in both land area and population) and were already relying on the generosity of the New Zealand and Australian aid programmes that had been put in place to enable survival during the post-colonial years, as well as favourable policies for emigration to New Zealand (Scheyvens & Russell, 2013).

When these small Pacific micro-states were compared with other bigger islands, such as Fiji, Tonga, Samoa, Vanuatu, French Polynesia, New Caledonia and the Solomon Islands, it was noticeable that the larger islands, while featuring aspects of the MIRAB model, were also very involved in building local industries such as fisheries and agriculture, and tourism infrastructure and transportation development.

*Mired in MIRAB*, by David Abbott and Steven Pollard, is an updated review of the MIRAB model. This 2019 report questions how well the MIRAB model has served our understanding of the economic growth and development of the Pacific Island countries. Abbott and Pollard highlight the current seasonal worker schemes between the PICs and the horticulture industries of New Zealand and Australia. The unprecedented level of international assistance and protected environments for business tend to allow these economies to survive but can be detrimental to the home economy. This can be observed in domestic skill shortages in Vanuatu and Tonga, which are heavily involved in the export of seasonal labour. There is decline in agriculture sector productivity as labour is encouraged to join the overseas work programmes, with poor environments for domestic investment and commerce and undermining of incentives for greater domestic dynamism. Abbott and Pollard (2019) asked whether the MIRAB model serves solely to describe the nature of PIC economies or has been promoted as a preferred model for

development in the South PICs. The impact of the MIRAB factors needs to be better understood, declared and addressed. It is also important to note that the MIRAB model itself has continued to struggle to incorporate the role of tourism in PIC economies and has been criticised for not having relevance beyond the very specific context of the South Pacific (Bertram, 2006; Milne, 2013).

Over the past two decades, many governments and donor agencies have pursued alternative economic plans and strategies in attempts to move beyond dependency and the constraints and distortions associated with MIRAB-led development. There is a focus on using their own resources as much as possible and on looking for support where needed to meet UN Sustainable Development Goals. Abbot and Pollard, who work for the South Pacific Community (SPC) based in Noumea, present a framework for such a growth model for PICs that is based on established socio-economic policies and building institutions that support growth and development (Abbot & Pollard, 2019).

It can be argued that because of their diversity, no single model can adequately typify the economic development of the small Pacific Islands and their micro-economies; even those economies classified as MIRAB economies are very diverse in nature (Scheyvens & Russell, 2013). This diversity was partly behind the emergence of two taxonomies additional to MIRAB for small-island socio-economic models: PROFIT (People considerations; Resource management; Overseas engagement; Finance, Insurance and taxation; and Transportation) and SITE (small island tourist economies). The key economic flows in MIRAB are remittances and aids; the related flows in PROFIT are tax-haven and money laundering transactions; and in SITE, tourism revenues (see Bertram, 2006).

Harrison and Pratt (2015) identified that tourism's share averages 11.9% of the GDP of Pacific Island economies. However, there is a large degree of variation between PICs. For example, Palau and the Cook Islands, where tourism's economic contribution is 67.1% and 50% of GDP, respectively, could be classified as SITEs. In contrast, tourism's economic contribution to GDP is a mere 1.7% and 0.1%, respectively, for the Solomon Islands and Papua New Guinea, largely because these two countries are resource rich and have not prioritised tourism in the past, and both have also faced negative impacts on tourism from safety and security problems. Tourism makes little contribution in some other countries, too, but for a different reason – these islands lack the resources, among other factors, for tourism to provide significant economic benefits

(Milne, 2013). For example, the Marshall Islands, Tonga and the Federated States of Micronesia can be classified as MIRAB states and tourism contributes only 2.9%, 6.0% and 7.3% of GDP, respectively, to each of their economies. Lastly, there is a third group of PICs that lie somewhere between MIRAB states and SITEs; for example, Fiji, Vanuatu, Samoa and Tahiti, where tourism contributes between 10% and 30% of GDP.

For many countries, government reforms and restructuring are common features of today's political environment with significant influences playing out on the governance and development of tourism (Dredge & Jenkins, 2007). Since the 1970s, the state has become an increasingly less-dominant influence (Lockhart, Schembri, & Smith, 2002). In her studies of small island economies, Chaperon (2012) discussed the merits of private–public sector partnerships in tourism development and the special roles, expertise and strength brought by the private sector to grow tourism. Likewise, Scheyvens and Momsen (2008) argued that public–private sector situations have evolved considerably, with more benefits flowing to the people of the region.

Recent studies on special aspects and strengths of tourism development in the South Pacific region have shown a range of national emphases and priorities. Scheyvens and Russell (2013) studied aspects of tourism in Vanuatu and identified that encouraging private sector growth, private sector business and more participation by the local community could help to alleviate poverty in that country. They also noted the need for a greater emphasis on skills and training to realise the potential benefits tourism could bring to the people of Vanuatu.

Smaller islands like Tuvalu and Kiribati, with very small private sector and business resources, rely heavily on air transportation and investment from the larger Fiji economy (South Pacific Tourism Organisation, 2014). Main regional aid donors to the Pacific islands, such as the World Bank and Asian Development Bank (ADB), are involved in both the formulation of national tourism plans and private sector development, with priority requirements on areas such as employment and social welfare of the local population (World Bank, 2017b). There is also a deliberate move to support local investment in tourism, facilitate the visiting friends and relatives (VFR) traffic from abroad, build appropriate infrastructure for tourism growth, and support local airlines to avoid more dependency on metropolitan airlines (for example, the operation of Fiji Airways, Samoa Airways and Vanuatu airlines). All PICs are involved in their own internal economic plans and incentives for foreign investment (Milne et al.,

2017). The exception to this is major projects, funded by the World Bank, ADB and the United Nations Development Programme, in areas such as energy, climate change mitigation and infrastructure development (Pacific Islands Forum Pacific Islands Forum Secretariat, 2019).

### *2.3 The Role of Accommodation in Destination Development*

As the accommodation sector is an integral part of the visitor experience and a destination's competitiveness, it must be factored into any attempts to understand tourism development, related visitor marketing, and economic, environmental and societal impacts (Sharpley, 2000). The importance of accommodation in the total visitor experience (Connell & Page, 2014) is reinforced by the fact that it accounts for a large percentage of overall visitor spend and forms an important "gateway" to surrounding products and activities. Accommodation provides the opportunity for visitors to stay longer to enjoy and experience local attractions and interact with the host population, with their spending contributing to the local economy.

The qualitative and quantitative characteristics of the supply of accommodation have a direct influence on the overall success and development of tourist destinations (Sharpley, 2000). The range of hotels and other forms of accommodation facilities plays a vital role in attracting a diversity of visitors from different market segments. Harrison and Prasad (2013) analysed the pattern of hotel and accommodation sector ownership in the Pacific islands. They argue that the structure of the accommodation sector differs across the region, depending on colonial linkages as well as on national government policies on overseas investments. Transnational hotels, for example, play important roles in Fiji and Vanuatu but are less apparent in Tonga, Samoa and the Cook Islands.

#### *2.3.1 Establishment of core accommodation facilities*

Previous research and national tourism plans have emphasised that for island destinations, having core accommodation, particularly a keystone resort/hotel sector, is a prerequisite for becoming a globally competitive tourism destination. Accommodation provides tourists with a base for activities and tourism infrastructure is incomplete, and not able to grow, in its absence (Cooper et al., 2008). Types and organisation of accommodation varies in relation to sector size, facilities and experiences offered (Cooper et al., 2008, p. 344.)



In Tonga, the government's decision in 1965 to build the country's first hotel, the International Dateline Hotel, as well as make improvements to its regional airport at Fua'amotu, played a key role in initiating air visitor traffic. Before that, cruise ship visitors were the only form of tourism National Development Plan, 1977 (Lascelles, Mumtaz, & Safier, 1978). In Samoa, the extension of and improvements to Aggie Grey's Guest House in the early 1950s, along with the establishment of the government-owned Tusitala Hotel in the 1960s and improvements to Faleolo Airport, played a key role in initiating air visitor traffic to Western Samoa (Western Samoa Development Plan, 1992–2001).

Recent research in the Cook Islands (Milne, Sun, & Histen, 2015) showed that an understanding of the profile of the visitor characteristics associated with different accommodation types could assist in both the marketing and broader sustainable development of the tourism industry. For example, a focus on large-scale hotel accommodation has effects (both positive and negative) that are quite different from a focus on community-based home rentals. Milne et al. (2015) found that visitor spend varies depending on the type of accommodation used. Accommodation choice also influences length of stay, with visitors tending to stay for shorter times in Hotels and Resorts and longer in Self-contained units and rental homes. This type of information is vital for helping tourism industries in the South Pacific to select which forms of tourism development to encourage, factoring in the effects of the “sharing economy”, such as home rentals and Airbnb. Furthermore, the scale, standard and availability of the various types of accommodation influence the type of visitors to an area, their length of stay and the activities they undertake.

Investment is essential, as it takes time to build the appropriate hotel supply and conduct the associated marketing and staff training (Westcott, 2015). Therefore, to ensure that the supply of accommodation (different and varying standards, sizes, themes, locations and pricing structures) contributes effectively to the tourism development plan and objectives, it is vital that the accommodation sector is a fundamental element of the overall destination planning process (Sharpley, 2000).

The growth and development of the accommodation sector is intimately related to the overall development and success of tourism destinations in general. Sharpley (2000) noted that in addition to the impacts associated with the physical location of hotels, the quality of products and services associated with the accommodation sector and the total

supply of rooms both greatly influence the volume and orientation of visitors. This, in turn, influences the resultant economic impacts of tourism and employment levels at any given destination (Milne et al., 2014). In many cases, accommodation sector development supports the development of better infrastructure in an area and enables the local host community to enjoy improved public utilities and services that they may not otherwise have received. For hotels to remain sustainable and enjoy good growth, it is vital that they engage in more competitive strategies through innovation and price differentiation and this requires, in part, a deeper understanding of their guests (Jönsson & Devonish, 2009).

### *2.3.2 Destination image, accommodation and satisfaction*

Destination image is commonly conceptualised as a mental or attitudinal construct consisting of the sum of beliefs, ideas and impressions that a tourist holds of a destination (Crompton, 1979). Destination image plays a significant role in predicting tourists' behaviours. Satisfaction is a positive reaction resulting from favourable appraisals of consumption experiences (Babin & Griffin, 1998; Oliver, 1997).

Measuring and managing tourist satisfaction is vital for the development and success of tourist destinations (Sirakaya, Petrick, & Choi, 2004; Song et al., 2012).

A favourable overall image of a destination leads to higher levels of tourist satisfaction. Positive services and experiences during a stay improve satisfaction levels and result in greater spend at the destination and positive recommendations, as well as repeat visits and even greater spend. This increases the benefits to the local community and hotel operators from tourism, as well as to other visitors to the destination.

Cassidy and Brown (2010) noted that as well as developing appropriate and sufficient infrastructure such as good roads, airfields and viable transportation networks to PICs, planners need to be mindful of determinants of tourism to outer islands. The researchers surveyed 185 Australian tourists on why they chose to visit the outer islands of Vanuatu, such as Espiritu Santo, and found that climate and the destination's reputation as a holiday destination were important "pull" factors. They also noted that without available accommodation of a suitable quality or type, the outer island tourism industry will suffer. Thus, while it is important to have good transport infrastructure in place, the whole tourism experience (accommodation, activities, environment, climate and the destination's reputation including reviews from other tourists) is vital in supporting and determining tourism flows.

Destinations and accommodation establishments need to be both proactive and innovative. For example, a recent study in Kos, Greece proposed and evaluated a novel, alternative holiday package for small hotels, helping them to gain a share of the all-inclusive market. The package tour includes accommodation in small hotels and meals in a number of local, traditional small restaurants. The researchers surveyed tourists in an attempt to understand their attitudes and behaviours towards all-inclusive packages as well as the new alternative options. A case study concerning a preliminary feasibility appraisal about a possible application of this package in a real hotel was also examined and presented. The survey showed a noteworthy interest for the new package while the results of the feasibility analysis seem to be financially promising (Georgakellos & Papakonstantinou, 2014).

## 2.4 Conclusion

Some commentators have emphasized the need to be cautious about the rate of development of tourism in PICs and the benefits it is bringing to local populations (Cheer, 2010, Cheer et al., 2018). Nevertheless, the industry remains a cornerstone in most national development plans in the region. The Vanuatu National Tourism Development Plan 2030 shows clearly that enthusiasm for tourism development is growing. The Bislama phrase “*Turism blong yu blong yum*” (“Tourism belongs to you and me”) has resounded in official documents that urge development of the tourism industry. Nevertheless, practical evidence of this enthusiasm being converted into true economic gains for the local population remains to be seen (Cheer, 2016; Scheyvens & Russell, 2013; Tabani, 2017).

The aim of this chapter has been to review approaches taken to understanding tourism and development in Pacific Island countries (PICs), and to examine the role of accommodation investment and choices as a potential factor influencing development outcomes. The literature review has highlighted the need to understand more about the impacts associated with accommodation investment and choices, as these strongly influence the direction and impact of tourism development. The review has also highlighted the important role that accommodation plays in influencing visitor spend and overall satisfaction. It is critical that when planning a tourism industry and encouraging both domestic and foreign investment in the accommodation sector, careful thought be given to how the pattern of accommodation choices available will influence visitor flows and also types of destination impacts associated with the sector.

## Chapter 3: Research Methodology

This chapter presents the methodology employed to address the research objectives. It is argued that a mixture of both quantitative and qualitative approaches must be employed to meet the objectives. The thesis relies on international visitor survey (IVS) data that are largely quantitative in nature and are analysed using simple descriptive statistics. There is also a need to further explore qualitative data drawn from the IVS in order to examine visitor characteristics related to satisfaction, what visitors find least and most appealing about their tourism experience, and how things might be improved.

### *3.1 Consideration of Qualitative and Quantitative Methods*

Traditional understanding is that quantitative research subscribes to a “positivist” paradigm of science, while the qualitative approach subscribes to a “relativist” paradigm (Guba & Lincoln, 1994, p. 105). Both qualitative and quantitative methods can be used appropriately as part of any larger research paradigm, as mixed methods. Qualitative and quantitative methods are defined based on:

- the type of data used (textual or numeric)
- the logic employed (inductive or deductive)
- and the method of analysis (interpretive or statistical).

(Bazeley, 2002; Buber, Gadner, & Richards, 2004).

Approaches taken to further define qualitative and quantitative have long been associated with different paradigmatic approaches to research underpinned by different assumptions about the nature of knowledge (ontology) and the means of generating it (epistemology). *Epistemology* is “the study of the criteria by which we can know what does and does not constitute warranted or scientific knowledge” (Johnson & Duberley, 2000, p. 3). The choice of epistemology can be seen as a pivotal issue in any form of research, as according to Gill and Johnson (2010), it is “how we know whether or not any claim, including our own, made about the phenomena we are interested in, is warranted” (p. 191). Epistemology’s theory of knowledge distinguishes between justified belief and opinion (Creswell, 2009).

Assumptions can be made about the existence of things in the world and the way the world works, as well as how we can know or learn about them. Beliefs about what exists and what things there are in the world are identified in philosophy as *ontological*

beliefs. However, both ontological and epistemological beliefs can be complex (Grant & Giddings, 2002). For example, Crotty (1998) defined epistemology and ontology by intertwining them from a theoretical perspective, seeing epistemology as advising the theoretical perspective. To Crotty (1998), each theoretical perspective represented a particular approach of understanding what ontology is, as well as a particular approach of understanding what it means to know epistemology.

Epistemology is based on three perspectives: objectivism, constructivism, and subjectivism (Gray, 2011). *Constructivists* believe there is no single reality or truth, and that reality needs to be interpreted. In *objectivism*, the objective truth does not take into consideration the researcher's subjective values. For example, a cherry blossom tree in Japan can symbolise both spring and the fleeting nature of life; however, symbolic meanings have no place in objectivism. *Subjectivism* is based on the belief that all knowledge is solely a matter of perspective; the meaning of the tree could be viewed from the perspective that it is constant and unchanging, but this assumption is questionable, depending on how society interacts with the tree (Gray, 2011).

Constructivists, also known as interpretivists, base their beliefs on the view that there is no single reality or truth, and therefore, reality needs to be interpreted, which means constructivist researchers tend to use qualitative methodologies to obtain diverse subjective views on multiple and diverse realities. The *interpretivist paradigm* originally proposed that methods used to understand knowledge-related social sciences cannot be the same as those used in physical or natural sciences, "because [a] human interprets their world and then acts based on such interpretation while the world do[es] not" (Hammersley, 2013, p. 26). Consequently, interpretivists adapt a relativist ontology in which a single phenomenon may have multiple interpretations, rather than a single truth that can be determined by a process of measurement. With an interpretivism perspective, researchers attempt to gain a deeper understanding of the phenomenon and its complexity in its unique context, instead of trying to generalise to a global understanding for the whole population (Creswell et al., 2007).

In the present research, I applied interpretivism as the research paradigm, and true to the mixed nature of the IVS dataset I was working with (with both quantitative and qualitative dimensions present), I adopted a subjective epistemology. Jennings (2010) argues that this paradigm is the most suitable for understanding travel experiences in the wider context of tourism development as the researcher needs to be "familiar with

qualitative methodology to successfully gain the knowledge from the study setting” (p. 40). This approach is also appropriate in settings where the information can be neither precise nor completely accurate and where there is limited pre-existing knowledge on the subject. Clearly, a mixed quantitative and qualitative approach was the most appropriate for analysing information on accommodation-choice-related visitor characteristics and visitor satisfaction in Vanuatu. Indeed, it is increasingly commonplace in tourism studies to use a variety of both quantitative and qualitative methodologies (Bazeley, 2018).

In general, qualitative research does not involve the use of statistical procedures to describe the characteristics of phenomena, nor does it test hypothetical predictions about those phenomena. Quantitative methods have tended to dominate the various sub-disciplines that comprise management research, such as marketing, strategy, organisational behaviour, accounting, finance and human resource management (Bazeley, 2019). Using a mixed methods approach in this research, applying interpretivism and adopting a subjective epistemology allowed for a more complete and comprehensive understanding of the Vanuatu visitor characteristics related to accommodation choice. Adopting interpretivism gave greater emphasis to the survey respondents’ points of view in a social context. Mixed method approaches are diverse, complex and nuanced (Holloway & Todres, 2003) but this approach was felt to be the best suited to addressing the research objectives that drive this thesis.

Thematic analysis is often seen as a foundational method for qualitative analysis (Braun & Clarke, 2006). Thematic analysis is a research method for locating collective strands of meaning from compared individual experiences. This is initially achieved by a careful reading of the data collected to recover “structures of meanings that are embedded and dramatized in human experience represented in a text” (van Manen, 2014, p. 319). In fact, the term “theme” is used in different contexts in qualitative research (Boyatzis, 1998; DeSantis & Ugarriza, 2000; Saldana, 2013). DeSantis and Ugarriza (2000) noted that ambiguities in defining theme are caused, in part, by the failure to separate the term theme from the term “thematic analysis”. To remove this confusion, they identified four key criteria to act as a basis for the definition of a theme: (1) emergence – the initial idea of the theme comes from the data and not from the researcher, (2) abstract nature – the theme is expressed in the researcher’s own words, rather than in the specific phrasing of the research participants, (3) iteration – a theme is representative of repetitive patterns discovered within the data., and (4) level of

identification – a theme may be discerned in one or more classified levels of data stratification.

For many coding strategies, a theme is an outcome rather than something to be coded; the theme delimits what is possible to infer from the data analysed. Other approaches suggest using themes to analyse themed groups of data further (Saldana, 2013). As such, themes become an analytical tool. Thematic analysis can then create links with an extended thematic statement that embodies the generalised, salient features of a group of themes. Such groups are accorded the status of sub-themes (DeSantis & Ugarriza, 2000). Thematic analysis encompasses the spectrum of identifying and developing themes within the datasets used, and the overall process of further abstracting and making sense of new themes that are uncovered (van Manen, 2014).

One of the benefits of thematic analysis is its flexibility. Qualitative analytic methods can be divided into two camps. First, there are those tied to, or stemming from, a particular theoretical or epistemological position. For some of these methods, such as conversation analysis (CA) (Smith & Osborn, 2003), there is (as yet) relatively limited variability in the way the method is applied within that framework. For others, such as grounded theory (Glaser & Strauss 1999; Corbin, 1998), discourse analysis (DA) (Burnman & Parker, 1993; Potter & Wetherell, 1987), or narrative analysis (Newman & Murray, 2003), there are different manifestations of the method from within the broad theoretical framework. Second, there are methods that are essentially independent of theory and epistemology, and that can be applied across a range of theoretical and epistemological approaches. Although often (implicitly) framed as a realist/experiential method (Aronson, 1994; Roulston, 2001), thematic analysis is firmly in the CA, DA and narrative group and is compatible with both essential and constructionist paradigms within psychology. Through its theoretical freedom, thematic analysis provides a flexible and useful research tool, which can potentially provide a rich and detailed, yet complex, account of data.

### *3.2 The Vanuatu International Visitor Survey*

The present research relies on the analysis of answers from 12,747 respondents from the Vanuatu International Visitor Survey (IVS) drawn from the time period January 2015 to December 2017. The Vanuatu Government collects email addresses from arriving passengers and forwards them to the New Zealand Tourism Research Institute (NZTRI)

which conducts the IVS survey online on behalf of the Vanuatu Government and the key funding agencies: the International Finance Corporation (World Bank Group) and, more recently, the New Zealand Ministry of Foreign Affairs and Trade. An invitation to participate, together with a statement explaining the purpose of the survey, is sent to all Vanuatu tourists who have provided their email detail. All data are treated anonymously. The Vanuatu IVS is approved by the Auckland University of Technology Ethics Committee (AUTEC).

All the research work for this thesis was supervised by NZTRI staff, with datasets held securely at NZTRI in their Auckland premises. Using mixed methods research, the focus was on both the quantitative and qualitative dimensions of the IVS, with increased emphasis placed on the latter given that these particular areas of the dataset had not been explored in any depth previously.

The analysis of the IVS data focuses on visitors who stayed in the main accommodation types, as identified by the Vanuatu Tourism Office (VTO): Hotel, Corporate Hotel, Resort, Major Resort, Boutique Accommodation, Motel, Self-Contained Unit, Guest House, and Island Bungalows. The category “Multi-type” is also used to refer to visitors who choose to stay in more than one type of accommodation (Appendix 1). The survey data were analysed to gain broader insights into visitor characteristics associated with the different accommodation choices. The quantitative analysis of the data focuses on:

- visitor characteristics, such as country of origin, purpose of visit and transport used to get to Vanuatu
- number of previous visits to the destination
- visitor demographics, such as age profiles, gender, average household income, average length of stay
- visitor movements, number of outer islands visited, information sources used, influential factors for visiting Vanuatu
- visitor economic impacts, including average expenditure, an.
- visitor satisfaction with their overall travel experience and key aspects of the visitor product.

The qualitative dimensions of the survey focus on open-ended questions designed to gain greater insights into what visitors find most and least appealing about their visit to Vanuatu and how they believe their experience could have been improved. An online survey approach is used for the Vanuatu IVS, because that approach is both cost



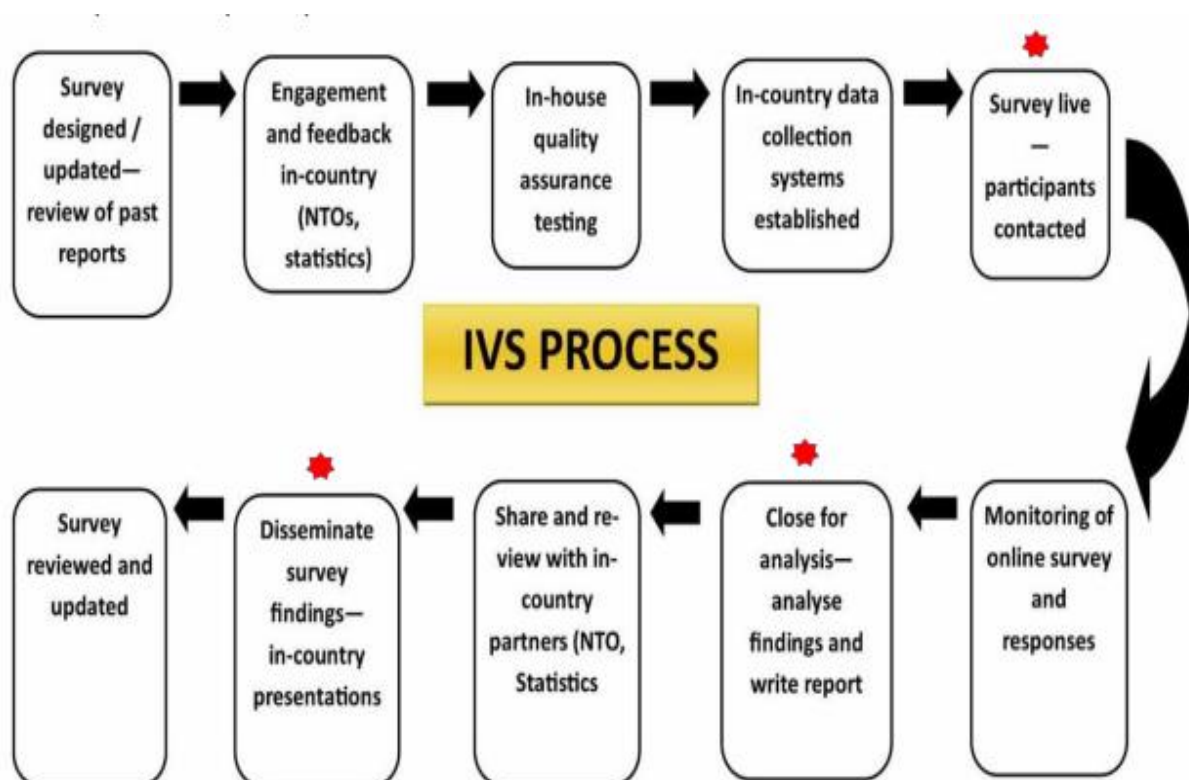
effective and provides visitors with an opportunity to reflect on the visit after they have gone home. It generates deeper qualitative insights by using open-answer questions and offers the potential of being an ongoing “barometer” of development, rather than being a one-off data-gathering exercise (NZTRI, 2014). The same IVS model is also being used in the Cook Islands, Papua New Guinea, Solomon Islands, Niue, Samoa and Yap (in the Federated States of Micronesia). In completing the qualitative visitor profiling presented in Chapter 7, the researcher adopted the narrower accommodation classifications of Hotel, Resort, Motel, Guest House and Island Bungalow, and Multi-accommodation.

Figure 3.1 outlines the IVS survey and data collection process. The initial IVS survey design took place in close consultation with key Vanuatu stakeholders and partners during 2014 (Appendix 3). The Vanuatu Departments of Immigration, Tourism and Statistics needed to collaborate to gather email addresses from arrival and/or departure cards. In-country data collection systems were established in collaboration with the NTO and related agencies.

Once these systems were established, the survey went live in late 2014, and participants were contacted. Monitoring of the online survey and analysis of the responses has continued until the current day and is funded until the end of 2020 by the New Zealand Ministry of Foreign Affairs and Trade. The survey dataset is closed for data analysis on a regular basis with quarterly, semi-annual and annual reports produced. The present research utilises two years of the dataset from 2015 to 2017.

This thesis focuses on generating a deeper understanding of the characteristics, behaviour and impacts of visitors who stay in different forms of accommodation. A total of 12,747 respondents were used in the data analysis for the period from January 2015 to December 2017 (see Table 3.1).

Figure 3.1 The IVS survey and data collection process



Source: NZTRI (2014).

Table 3.1 IVS respondents by accommodation type, January 2015–December 2017

	Number of respondents	Percentage
<b>Hotel</b>	983	7.71
<b>Corporate hotel</b>	590	4.63
<b>Resort</b>	4,184	32.82
<b>Major Resort</b>	2,047	16.06
<b>Boutique</b>	582	4.57
<b>Motel</b>	615	4.82
<b>Self-contained</b>	714	5.60
<b>Guest House</b>	69	0.54
<b>Island Bungalow</b>	197	1.55
<b>Multi-type</b>	2,766	21.70
<b>Total</b>	<b>12,747</b>	<b>100%</b>

Note: Vanuatu Tourism Office (VTO) categories are used (see Appendix 1). “Multi-type” refers to those who use a mixture of accommodation types.

### *3.3 Research Methods*

The mixed methods employed consisted of descriptive statistical analysis of secondary data obtained from the IVS in terms of purpose of visit, country of origin, demographic data (e.g. age groups), expenditure patterns, and economic impact on the destination. The researcher also extracted qualitative long-answer information from comments about the visitors' most- and least-appealing experiences of Vanuatu and the visitors' suggestions for improvements were also reviewed.

The quantitative analysis of the visitor characteristics was conducted using SPSS and was worked on by the researcher as part of a larger team; the researcher was focused on the interpretation of results and was a co-author on related reporting. The qualitative data were analysed solely by the researcher using the qualitative data analysis software package NVivo (Introduction to using NVivo, 2017). Codes were assigned to visitor comments. The codes were grouped to form conceptual value clusters, allowing similar instances of phenomena to be compared and contrasted, and, where similar, to check that they had been coded consistently (Douglas, 2003). As noted by Glaser and Strauss (1999), this process of constant comparison gives increased confidence in the validity of the codes selected.

The definition and analytic function of a "theme" varies among writers and researchers, but overall, a theme is a concept category, stated in an extended phrase or sentence, that identifies what a unit of data is about and/or what it means. Boyatzis (1998) has explained that a theme "at a minimum, describes and organises possible observations or at the maximum, interprets aspects of the phenomenon. A theme may be identified at the manifest level (directly observable in the information) or at the latent level (underlying the phenomenon)" (p. vii). DeSantis and Ugarriza (2000), after an extensive literature review on the use of themes in qualitative research, found that the term was often used interchangeably with such words as "category", "domain", "phrase" or "unit of analysis" (p. 358). These authors proposed a more stable definition that was based on content analysis. This thesis employs a definition of theme in line with Saldana's (2013) description: "A theme is an abstract entity that brings meaning and identity to a recurrent (patterned) experience and its variant manifestations. As such, a theme captures and unifies the nature or basis of the experience into a meaningful whole" (p. 362).

There are various ways of analysing or reflecting on themes after they have been generated. The researcher in this study utilised basic categorisation as the initial tactic, looking for ways in which various themes are similar and different, as well as the kinds of relationships that may exist among them (Gibson & Brown, 2009). The themes were then further categorised according to commonality to reflect possible groupings and relationships. For example, this technique highlighted the similarity between hotel and Resort visitors and their visitor characteristics which then made it logical to group these together. The discussion can then examine each of the constructs and the way they integrate with or relate to one another. Themes and their related quotes are further employed as illustrative examples to support discussions (Saldana, 2013) in Chapter Six and are integral to the profiles developed in Chapter Seven.

## Chapter 4: Vanuatu as a Tourist Destination

The Republic of Vanuatu (independence was achieved in 1980) consists of 83 inhabited islands, with a predominantly Melanesian population of 276,244 people (Vanuatu National Statistics Office (VNSO), 2019a; World Bank, 2017a). Vanuatu is one of the most culturally diverse PICs in the region. Spoken languages are Bislama (English-based Creole), English, French and various Austronesian languages. Bislama has developed as the common language of use (The Permanent Mission of the Republic of Vanuatu to the United Nations, 2015).

The Y-shaped chain of 14 main islands between the South Pacific Ocean and the Coral Sea is of volcanic origin and home to several active volcanoes. The islands' terrain is mostly mountainous (Central Intelligence Agency, n.d.). Larger islands are characterised by rugged volcanic peaks and tropical rainforests. Vanuatu is located in a seismically and volcanically active region. The colliding Pacific and Indo-Australian continental plates provide for geological activities like earthquakes, tsunamis, cyclones and volcanic eruptions. Mount Yasur on Tanna Island is an easily accessible active volcano and a major tourist attraction on this island.

The capital and largest city is Port Vila, which is situated on Éfaté, the most developed island in the archipelago. Since 1994, Vanuatu has been divided into six provinces. The northernmost province is Torba. Sanma Province is to the west of the island group, with Espiritu Santo as its main island. Penama Province's main island is Pentecôte Island, to the east of Espiritu Santo. Malampa Province, south of these two, comprises Malekula and other smaller islands. Shefa Province's main landmass is Éfaté Island, where the capital Port Vila is situated, and this is just to the north of Tafea Province. Éfaté is the most developed island in terms of tourism. The two most-developed outer islands from a tourism perspective are Santo and Tanna (VNSO, 2019b).

### *4.1 Vanuatu: A Brief Historical Overview*

When considering Vanuatu as a tourism destination, it is necessary to evaluate how historical events, activities, strategies and causal factors, including traditional, political, economic and commercial impacts, have influenced the current state of tourism development in Vanuatu. Such analysis provides insights into the current state of

tourism development as well as the possible direction of future growth and development pathways for Vanuatu.

The archipelago of Vanuatu has been inhabited since 500 BC by a mixed Melanesian/Polynesian population. Vanuatu's first people arrived about 3000 years ago from Taiwan and the Philippines, not from the Australo-Papuan populations:

They travelled past places where people were already living, but when they got to Vanuatu there was nobody there. These are the first people. Only sometime later did they intermarry with Papuan peoples to produce the genetic mix we see today in Vanuatu, and indeed across the Pacific.

(Petchey, Spriggs, Bedford, Valentin & Buckley, 2014).

European explorers visited the group of islands during early in the 17th century. The name New Hebrides was given to the islands by Captain James Cook during his visit in 1774 (VTO, 2019). During the 19th century, French and English Christian missionaries and some traders and planters settled on some of the islands, and they formed an Anglo-French condominium (ruled by British and French administrators) in 1906 (Commonwealth Secretariat, 2019).

At the end of the Second World War, several land conflicts started between the indigenous islanders of Vanuatu and the Europeans. A representative assembly replaced the old colonial administration council. The first national parliamentary election was in November 1975 and was extended to full operation in 1977. The Vanua'aku Pati (a democratic socialist party) was started and led by Father Walter Lini, an Anglican priest, who won the 1979 election and became Prime Minister. The archipelago gained independence on the 30th of July 1980, was re-named Vanuatu, and joined the British Commonwealth. Vanuatu's politics have since been marked by frequent changes of government. Subsequent political parties and various elected governments, until recently, have had to address and manage conflict of interest and corruption charges on a regular basis. Current Prime Minister Salwai was elected in 2016 and has presided over a period of relative political stability (Government of Vanuatu, 2019).

#### *4.2 Status of the Tourism Industry*

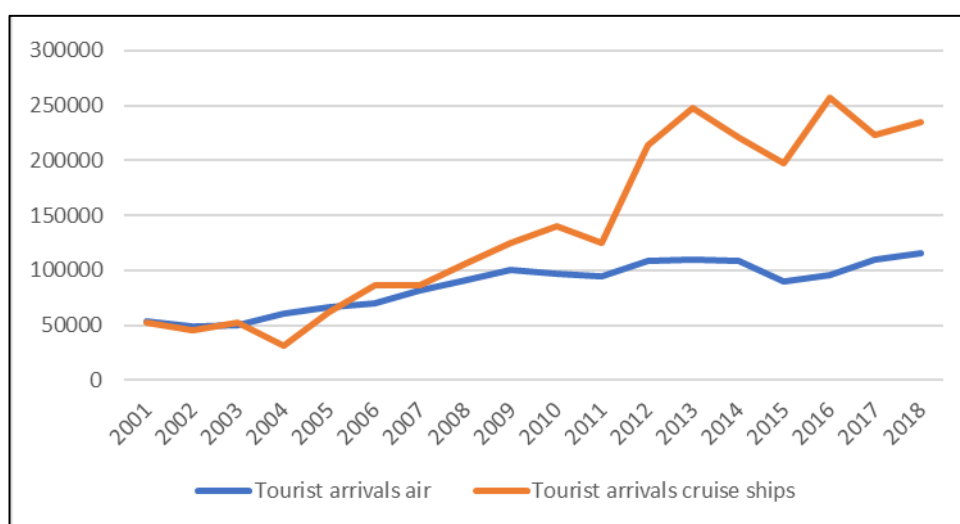
The geographical location of Vanuatu, less than three flying hours from the eastern seaboard cities of Australia, means it is relatively accessible and affordable for the

Australian market. Daily services from these metropolitan gateways, and connections from New Caledonia, New Zealand and Nadi (Fiji), make Port Vila a short-haul, accessible tropical destination with an invitingly warm climate, ocean and population. Vanuatu possesses a number of natural and cultural attractions, such as diverse cultural groups, accessible active volcanoes, white and black sand beaches, pristine coral reefs, shipwrecks as dive sites, and French cuisine.

Vanuatu's tourism is based strongly on markets seeking culture, nature, adventure, relaxation and, for some, different cuisine (Spriggs 2013; South Pacific Tourism Organisation, 2017c). Unique features of Vanuatu tourism include the very accessible Mount Yasur, a live volcano on Tanna Island, and Naghol land-diving, a traditional tourist attraction on Pentecôte Island.

More than four in five (82%) visitors come to Vanuatu for holiday purposes, while 10% come for business or conferences and 7% are visiting friends and relatives (VFR) (Vanuatu Strategic Action Tourism Plan (VSTAP), 2013). Visitor arrivals by air have grown relatively steadily since the early 2000s (Figure 4.1), with a slight decline during the global recession (which affected travel demand and oil prices) from 2009–2011. Cruise arrivals grew more dramatically over the past two decades but have stagnated and fluctuated in recent years.

**Figure 4.1 Tourism air and cruise ship arrivals to Vanuatu, 2001–2018**



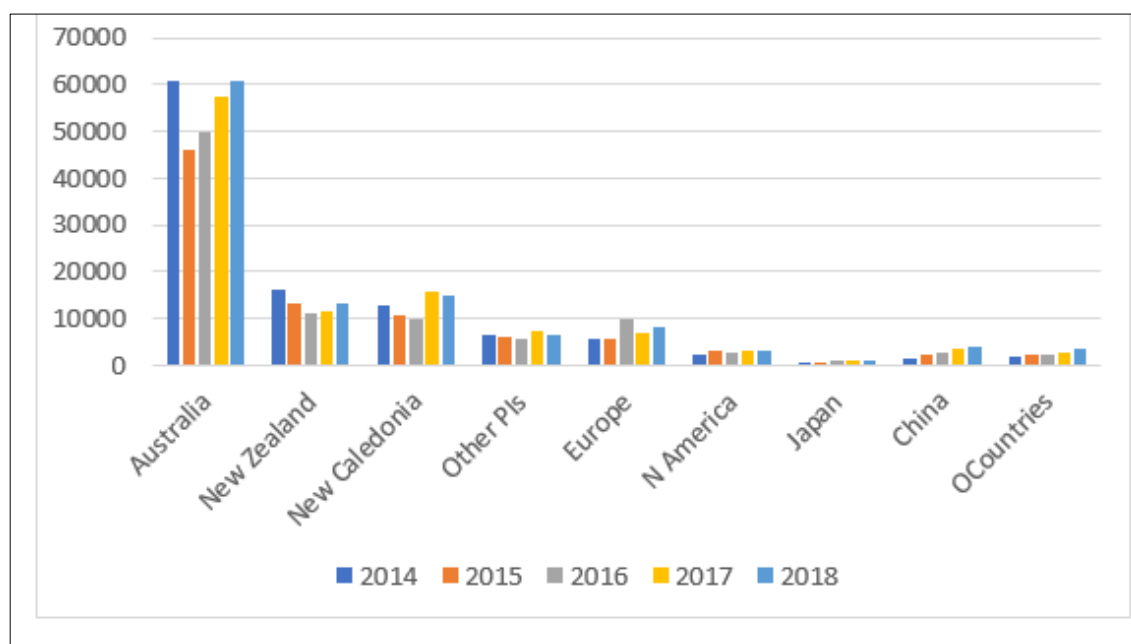
*Source.* Vanuatu National Statistics Office (VNSO) (2019b).

Tourism into Vanuatu took a dip in 2015 due to Cyclone Pam (Figure 4.2). Consequently, air visitor arrivals dropped by 24% and cruise ship excursionists decreased by 56% in the three months to June 2015 (VNTO, 2015). There was also a

significant reduction in business activities and tourism revenue, with a major down-turn in visitor yield (Milne, Li, & Sun, 2018; Sun & Milne, 2017). An additional setback to Vanuatu's tourism industry came in January 2016, when both Air New Zealand and Qantas (code share) withdrew their services between Auckland and Vanuatu because of concerns over the deteriorating condition of Port Vila's runway (VTO, 2016).

Tourist air arrivals to Vanuatu have experienced increases since 2016. Visitor numbers went up by 20% in 2016, with a further gain in 2017 of 14.7% to 109,063 visitors per annum by 2018 (VNSO, 2019a). Increased arrivals from Australia and New Zealand, as well as from other Pacific Islands, were triggered by the one-off Pacific Mini Games in December 2017. In 2017, more than half (52.6%) of the visitors (57,384) came from Australia, followed by the Pacific Islands and New Zealand, at 21.1% and 10.6%, respectively. Leisure tourists dominated Vanuatu's air arrivals in 2017 (76.2 %, or 81,037 visitors on holiday).

**Figure 4.2 Visitor arrivals by usual country of residence, 2014–2018**



*Source.* Vanuatu National Statistics Office (VNSO) (2019b).

By 2018, the number of air arrivals to Vanuatu had fully recovered to surpass pre-cyclone levels to reach 115,634 total, and cruise ship arrivals were plateauing and showing some stagnation at 234,567 arrivals (Figure 4.2). Air arrivals were driven by concerted marketing and branding efforts concentrated on visitors from Vanuatu's two leading markets: Australia and New Caledonia. Consequently, during the period 2017 to 2018, guests to Vanuatu from these two countries increased by 16.2% and 49.3%,

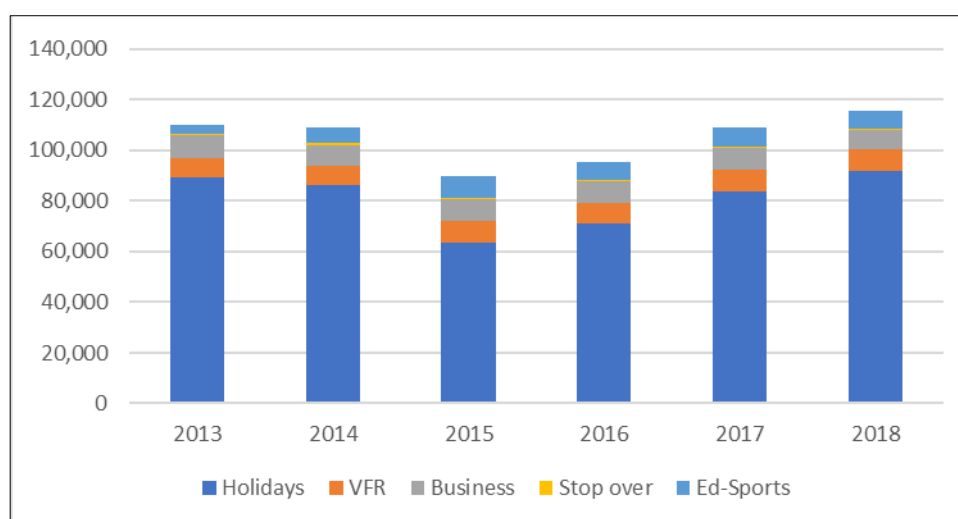


respectively, and Vanuatu saw a 5.7% increase in visitor traffic from New Zealand (VTO, 2019) (Figure 4.2).

In terms of visitor arrivals by country of residence, the Australian market is rebounding stronger than any other source market, mainly due to air services improvement and more marketing activities. The New Zealand market is still relatively small by comparison, due mainly to the absence of an Air New Zealand service to Vanuatu. Traffic from nearby New Caledonia has improved due to more air capacity developed between Air Vanuatu and Air Calin. Other long-haul markets like Europe, North America, China and other Asian markets have shown slight increases over the period from 2014–2018.

Holiday travel continues to dominate air arrivals (Figure 4.3). The Voluntary Service Overseas' (VSO's) 2018 marketing report noted that the rise in the number of visitors from other Pacific islands was also due to an increase in business conferences and the one-off Pacific Mini Games that was held in Vanuatu in 2017. As Figure 4.3 shows, business and VFR travel remain a relatively small but consistent component of the market.

**Figure 4.3 Vanuatu air visitor arrivals by purpose of visit, 2013–2018**



*Source.* Vanuatu National Statistics Office (2019a).

During the period 2014–2018, domestic air services to both the islands of Tanna and Espiritu Santo were much improved and there was an expansion in the number of rooms and the types of services and activities offered to visitors in these two outer islands (VTO, 2019). The flow of visitors has fluctuated due to the devastation of Cyclone Pam

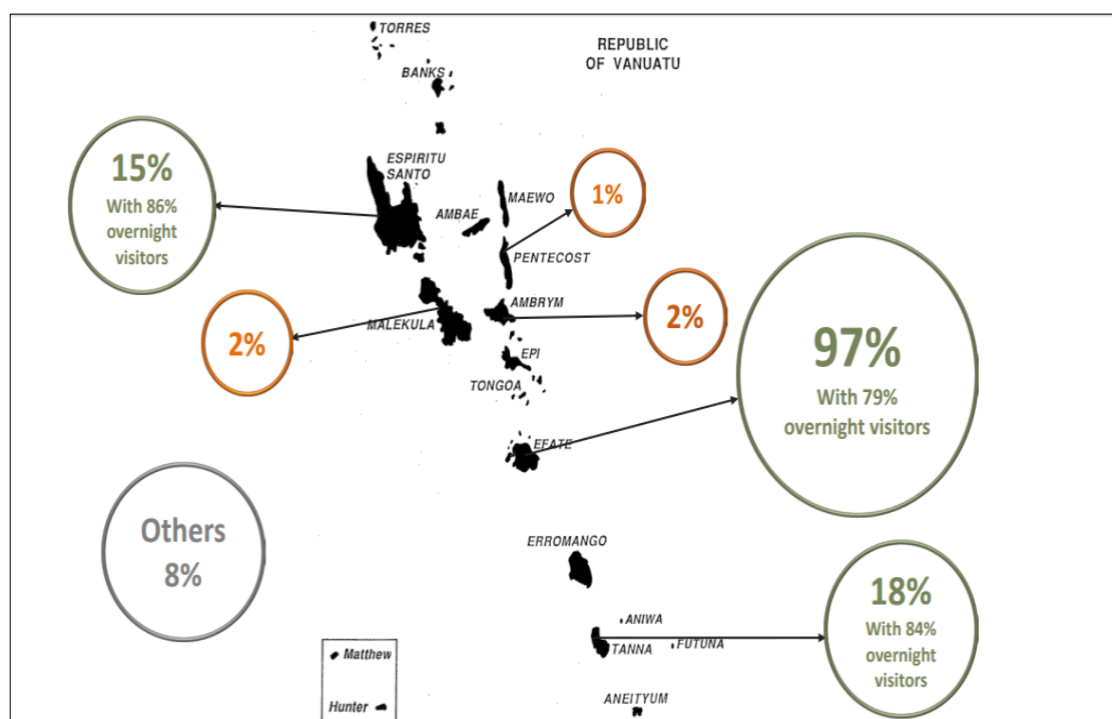
in 2015. An increase in short trips to the smaller islands offshore from Éfaté has occurred in the last few years, again due to improved transportation, infrastructure in place, and the increased diversity of small-size accommodation and recreational facilities available (VNSO, 2018) (Table 4.1 and Figure 4.4).

**Table 4.1 Air visitors to the outer islands**

Year	Tanna	Santo	Efate offshore	Pentecost	Malekula	Ambrym	Others	Total
2014	6343	4739	2144	379	636	521	1349	16111
2015	7295	5342	3201	1093	945	775	1572	20223
2016	7774	6861	4328	820	935	863	1973	23554
2017	10301	8840	3333	550	1071	837	2416	27348
2018	11258	10349	4419	527	1220	874	2460	31107

Source: Vanuatu National Statistics Office (VNSO) reports (2014, 2015, 2016, 2017, 2018).

**Figure 4.4 Islands visited in Vanuatu in 2017**



Source: NZTRI (2017) Slide 12

Air visitor numbers to the remaining outer/smaller islands showed only marginal increases, and these marginal increases reflect that fact that these islands are still in need of suitable transportation and accommodation options (VNSO, 2018). The Vanuatu IVS

showed that 15% of air visitors to the country travelled to Santo during 2017 and 18% to Tanna. Other outer islands receive only 13% of air travellers and many of these are small outlying islands of Efate. Malekula, Pentecost and Ambrym all received less than 2% of total visitors during 2017.

The cruise ship business in Vanuatu has fluctuated since its peak year of 2013. Cyclone Pam greatly affected the number of cruise ship calls in 2015 and total ship arrivals went down to 197,471. The number of ship calls rebounded in 2016, with the highest ever level of cruise passenger arrivals recorded at 256,482. This figure has reduced in the past two years, due mainly to repositioning of ships from cruise companies in the region. (See Table 4.2.)

More than 80% of ship calls (and 85% of cruise expenditures) are made at Port Vila and the port has been able to moor two ships at a time since late 2018. The Vanuatu cruise industry is expected to grow as cruise travel in general grows through the region. The estimated economic benefit to Vanuatu from the cruise industry during 2016 was AU\$42.8 million direct benefit plus AU\$23.1 million indirect benefit (Department of Foreign Affairs and Trade Australia (DFAT), 2016).

**Table 4.2 Cruise ship arrivals 2013–2018**

<b>Year</b>	<b>Number of the visitors</b>
2013	247,296
2014	220,205
2015	197,471
2016	256,482
2017	223,551
2018	234,567

*Source:* Vanuatu National Statistics Office (VNSO) reports (2015, 2016, 2018).

Cruise ships also play a role in bringing visitors to the outer islands of Vanuatu.

Table 4.3 highlights the key ports of call for cruise vessels and how the range of options has gradually been expanded in recent years.

**Table 4.3 Cruise ship industry, Vanuatu**

<b>Year</b>	<b>2001</b>	<b>2007</b>	<b>2013</b>	<b>2018</b>
Vanuatu ports	Port Vila Mystery Island Champagne Bay Lamen Bay	Port Vila Mystery Island Champagne Bay Lamen Bay Pentecôte Wala	Port Vila Mystery Island Champagne Bay Luganville Pentecôte Wala	Port Vila Mystery Island Champagne Bay Luganville Pentecôte
No. of calls	47	147	217	212
No. of excursionists	52,758	85,737	247,296	234,567

*Source:* VTO (2019). (Adapted from the 2018 cruise ship schedules.)

In August 2014, the World Bank Group, DFAT Australia and Carnival Cruises Australia collaborated to conduct a study of the economic impact of cruise ship tourism in Vanuatu (DFAT, 2016). The study found that over the previous 10 years from the report date (2015), Vanuatu's cruise arrivals had increased by 15% per year. The study found that cruising to Vanuatu was popular because of the area's location within a 2–3-day sail of Australia, and the destination offerings were varied, but centred on Port Vila.

Vanuatu is heavily reliant on its tourism sector (WTTC, 2017). Tourism is a large contributor to the informal economy through the sales of handicrafts and local foods, as well as the cash economies of Vanuatu's outer islands. Some key facts about tourism in Vanuatu show the significance of the industry, even though there are caveats that must be attached to the quality and reliability of the data used. All values are reported at 2017 values and exchange rates:

- *GDP total contribution* — the total contribution of travel and tourism to GDP was VUV41,325.6 million (US\$365.7 million) and it was forecast to rise by 4.0% in 2018, and by 4.1% per annum to VUV64,249.8 million (US\$568.6 million), representing 49.2% of GDP, by 2028.
- *Employment total contribution* — the total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, was 39.3% of total employment (30,000 jobs). This was expected to rise by 2.5% in 2018 to 31,000 jobs, and by 3% per annum to 41,000 jobs by 2028 (41.2% of the total).

- *Visitor exports* — generated VUV28,728.4 million (US\$254.2 million), or 61.6% of total exports in 2017. This was forecast to grow by 4% in 2018, and by 3.8% per annum, from 2018 to 2028, to VUV43,297.1 million (US\$383.2 million) by 2028, or 60.8% of the total visitor export value.
- *Investment* — travel and tourism investment in 2017 was VUV3261.6 million, or 15.5% of total investment (US\$28.9 million). It was forecast to rise by 5.4% in 2018, and by 6.3% per annum over the next 10 years to VUV6328.8 million (US\$56.0 million) by 2028, or 21.1% of the total.

### 4.3 Current Tourism Strategy

With tourism having been identified as a key economic sector in Vanuatu, institutions and agencies are currently working together in the planning, improvement and marketing of the tourism industry. These organisations represent both public and private sectors and all of them work in the field of tourism in Vanuatu. Their roles and responsibilities are as follows:

- *DoT — Department of Tourism*. The DoT is responsible for developing the country as an attractive destination for tourists, with offices in each of the six provinces.
- *VTO — Vanuatu Tourism Office*. This government agency is responsible for the official marketing of Vanuatu as a tourism destination.
- *VNSO — Vanuatu National Statistics Office*. Among its other roles, this government department collects and collates data on overseas visitors.
- *VHRA — Vanuatu Hotel and Resorts Association*. This business association is involved in local promotion and marketing activities and provides a private sector voice in discussions with government and others on tourism development.
- *VTOA — Vanuatu Tour Operators Association*. Another voluntary business association, the VTOA coordinates the marketing of members' tour packages. It has also developed a code of conduct for its members to abide by. The code covers health and safety, as well as respect for culture and the environment.
- *VIBTA — Vanuatu Island Bungalow and Tourism Association*. This private member body focuses on promoting tourism beyond Éfaté and on developing

tourist services on offer in the outer islands. It focuses on indigenous Ni-Vanuatu-owned businesses.

- *VIPA — Vanuatu Investment Promotions Authority*. This government branch has a mission to “facilitate, promote and foster foreign investment in Vanuatu, and to generate greater economic prosperity for the people of Vanuatu”. (VTO, 2018)

There are a number of key strategies and policies that are guiding tourism development in Vanuatu and these are now outlined below.

*Vanuatu 2030 — The People’s Plan* is the country’s 15-year national sustainable development plan 2016–2030, designed to realise the United Nations’ Sustainable Development Goals (SDGs) (Department of Strategic Policy, Planning and Aid Coordination. (2018). Tourism development is recognised in the plan as an important sector for the country and as a key means of achieving the vision of the SDGs. *The Peoples Plan* has proposed regional tourism developments in all six provinces of the country: Torba, Penama, Sanma, Malampa, Shefa and Tafea. With 70%–80% of the population and resources based in rural areas, the establishment of six provincial centres by an Act of Parliament is aimed to promote and expand development in rural communities. However, most developments are still taking place in the two historic urban centres of Port Vila (on Éfaté) and Luganville (on Espiritu Santo) (Government of Vanuatu, 2016).

In 2011, the Asian Development Bank (ADB) noted that infrastructural improvements were required to encourage economic development across the country, including rural areas and the outer islands, where income-generating opportunities were scarce (ADB, 2011). The ADB financiers identified an urgent need for improved road networks and ports, wharves and jetties, in addition to more reliable and affordable shipping services and, in some cases, accommodation.

The *Vanuatu Strategic Tourism Action Plan 2014–2018* (VSTAP), funded by the New Zealand Government, links to the *Vanuatu 2030 – The People’s Plan* and places a focus on tourism sector development that will benefit the host population and reduce levels of poverty. It highlights the need to improve linkages with other economic sectors and businesses, especially in agriculture and handicrafts. The VSTAP program also focuses on the fact that relatively few tourism businesses are owned by Ni-Vanuatu (VTO,

2016). Thus, the Government is focused on helping Ni-Vanuatu businesses through its investment policies and incentives (*Vanuatu Tourism Action Plan 2030*).

This plan is a continuation from the previous *Vanuatu Tourism Action Programme* (2008–2013) and operates under the vision statement of: “Tourism celebrates Vanuatu’s culture and environment, empowers its people and captivates its visitors throughout the island”. The five priority areas are:

- 1 infrastructure and transport access, such as upgrading accessibility for cruise ships
- 2 tourism investment, which will create a conducive environment for accommodation investment and growth
- 3 further product development that reflects and builds on Vanuatu’s unique cultural and natural features
- 4 human resource development to build the capacity and skills needed to grow the tourism sector
- 5 governance and institutional strengthening; and destination marketing.

Arising from these key priorities, several action areas have been identified:

- 1 to deliver infrastructure improvements (roads, airports) to improve tourism benefits to the outer islands
- 2 to collect robust market data and intelligence information to effectively target core markets of Australia, New Zealand and New Caledonia
- 3 to improve wharves in Port Vila and Luganville, as the cruise sector is receiving inadequate port services, and
- 4 to set minimum requirements and standards for the tourism industry, because low accommodation and service standards can affect the overall visitor experience enough to deter repeat visitors.

The VSTAP 2014–2018 is about “doing the basics better” (Ministry of Tourism, Industry, Commerce & Ni-Vanuatu Business, 2014, p. 39). The plan has identified key priorities and areas to improve. One priority noted is the need to invest in planning and key infrastructure and transport improvements to benefit tourism. In addition, the plan has noted the need to improve the range and standard of accommodation facilities to attract higher-spending visitors.

The projects arising from this plan include investing in key aviation infrastructure and navigational and communication equipment for Vanuatu’s three international airports,

including new runway lighting and improved safety and security equipment for luggage. Cargo screening is also a part of these upgrades. Bauerfield International Airport in Port Vila will receive urgent runway rehabilitation to cater for larger airplanes and it will benefit from a new domestic terminal.

Vanuatu's two main ports of entry are being upgraded and extended to allow bigger and more frequently visiting cruise ships to dock in Vanuatu harbours. On the islands of Malekula and Tanna, which have a high potential in tourism and trade, the main roads have been upgraded to standard tar-sealed roads, to increase economic activity. The construction of road networks has been funded by the China-based international company China Civil Engineering Construction (CCEC).

In Vanuatu, climate change is affecting all sectors of the economy including tourism. The effects of climate change will have grave consequences – decreased national income, increased social support costs and increased infrastructure costs. Climate change is predicted to affect all areas of life for the Ni-Vanuatu people (Global Environment Facility (GEF), UNDP, & SPREP, 2019).

In response to the climate change threat, the Vanuatu Coastal Adaptation Project (VCAP) 2014–2018 focused on building resilience through improved infrastructure and sustained livelihoods. The targeted vulnerable areas were coastal zones, where tourism developments are densely distributed, including higher-end resorts and bungalows. To address the current and impending effects of climate change, VCAP, initiated through the UN Development Programme (UNDP) Climate Change Adaptation strategy, has worked to implement adaptive strategies and resilience with regard to the effects of rising sea levels, estimated to be 20 cm by 2050 (World Bank, 2018). Vanuatu's tourism is based strongly on markets seeking unique Melanesian cultural experiences, back-to-nature outdoors pursuits, island adventures (both land and marine), and pure relaxation. The impacts of climate change on these pursuits and offerings are being addressed by the Vanuatu Government associated tourism agencies via mitigation measures, and the private-sector tourism industry also has a strategic role to play.

With the increasing demand for skilled hospitality and tourism workers in Vanuatu, both the Vanuatu Tourism Office and other government agencies are addressing this gap to ensure that a growing tourism sector has skilled employees. A good employee base is vital for servicing new and growing markets and to continue towards social prosperity (Government of Vanuatu, 2016). Thus, the Government has created a national post-



school education and training (PSET) policy. The Vanuatu Institute of Technology offers courses up to diploma level in hospitality and tourism, and local businesses such as hotels and resorts provide non-accredited training to upskill their employees and to improve productivity and efficiency. This kind of workplace training is generally focused on specific organisational contexts of the business, such as learning about a reservation system, improving website navigation, or financial management training. The Australia-Pacific Technical College, funded by the Australian Aid Programme, also contributes formal and informal skills training in the tourism sector (Vanuatu Sustainable Tourism Policy 2019–2030).

There are constraints to skills training in Vanuatu, such as the remoteness of the outer islands, that can lead to poor customer service in the tourism industry. However, the Vanuatu Skills Partnership programme, which facilitates training in rural locations in Vanuatu through provincial skills centres and via tourism and accommodation operators, is supported to improve the business of tourism by means of targeted skills development. The focus of the partnership is on sustainable and inclusive economic growth. One of the outcomes of this approach has been the steady increase in the number of informal tourism businesses operating out of the Tafea, Torba and Malampa provinces (Cheer et al., 2018).

The provision of adequate, safe and sustainable air services to Vanuatu has been a major constraint in the development of tourism. In the past, air services have sometimes been suspended because of poor management, lack of capital or poor airport infrastructure (Taumoepeau, 2015). Air Vanuatu, which connects Vanuatu with Sydney, Brisbane, Melbourne, Auckland, New Caledonia and Nadi, plans to improve frequency and capacity from mid-2020 (Air Vanuatu, 2019). Airports in Santo and Tanna are being upgraded to attract more direct regional services and improve capacity for domestic flights. Improvements to airfields in the outer islands are part of the overall national infrastructure development plan that is forecast for implementation by 2030. The *Vanuatu Tourism Infrastructure Project* (VTIP, 2014–2018) is part of the overall Vanuatu Strategic Tourism Action Plan (VSTAP) 2014–2018. The VTIP goal is to contribute to a buoyant, resilient tourism sector that provides greater economic returns for Ni-Vanuatu and to achieve higher GDP through the promotion of sustainable international tourism.

#### *4.4 The Critical Role of Accommodation*

Historically, with the French and British administrations, large tourism developments (hotels and resorts) in Vanuatu have been owned by overseas investors and hence have been financed adequately, which puts Vanuatu ahead of its neighbours (for example, the Solomon Islands, Samoa, and Tonga – but not Fiji). However, this historic situation of majority foreign ownership has led to overseas leakage of tourism earnings. Thus, tourism benefits at the local level have been muted by overseas financial leakage and lack of local backward linkages, a situation that has constrained the number of opportunities for income generation and job creation (Milne et al., 2006; Scheyvens & Russell, 2013). In fact, many Ni-Vanuatu have not experienced the benefits of economic development directly.

The availability of adequate accommodation establishments facilitates travel and attracts visitors to a particular destination or area. Port Vila has a good selection of diverse types of accommodation, from family-focused resorts and boutique properties through to budget-type accommodation and short-term rentals. And on Éfaté Island as a whole, there are more than 50 hotels and resorts and more than 100 holiday homes, residential homes and apartments for rent. Accommodation occupancy rates are estimated to be over 60% consistently in Port Vila (VNTTO, 2018).

In 2014, the estimated number of accommodation facilities in Vanuatu was 230, with more than 1500 rooms, or more than 3000 hotel beds, available (South Pacific Tourism Organisation, 2017c). In 2018, there were 358 licensed accommodation facilities (Table 4.4). It is important to note that many properties are not registered as yet, like Airbnb listings, self-contained units, rental houses, private apartments, and some locally owned island bungalows. In 2018, there were at least 2000 rooms in Vanuatu. This figure was boosted by major hotels and resorts such as the Holiday Inn and Le Lagoon, which had been closed for renovations, reopening their doors in 2018. In addition, Ramada opened a new 80-room resort in 2017. All these resorts and boutique properties are on Éfaté Island (except one boutique property on Tanna).

About 10% of the nation's accommodation (37 facilities with 1200 rooms) is classified as resorts and major resorts, and about 3% (nine facilities with 200 rooms) is classified as boutique. There are three internationally branded hotels – Warwick, Ramada and Holiday Inn – all located in the capital city of Port Vila. More than 32% (115 properties) of the total accommodation stock comprises Island Bungalows scattered

throughout the six provinces, with 32 bungalows in the Shefa Province, 26 in Tafea, 20 each in Torba and Malampa, 12 in Sanma, and five in Penama.

**Table 4.4 Licensed accommodation facilities in Vanuatu, 2018**

Distribution And Location Of Accommodation Properties														
	Island		Guest		Corporate		Major		Self-	Boutique	Unique	Holiday	Total	
Province	Homestay	Bungalow	Campsite	House	Hotel	Hotels	Motel	Resort	Resorts	Contained	Resorts		Homes	Properties
Torba	3	20	3	4	0	0	0	0	0	0	0	0	0	30
Shefa	5	32	2	22	14	3	19	27	3	30	5	3	3	168
Sanma	2	12	0	1	4	0	9	6	0	21	2	1	1	59
Malampa	5	20	2	15	0	0	0	0	0	1	0	0	0	43
Tafea	2	26	0	2	1	0	0	1	0	0	2	0	0	34
Penama	0	5	0	19	0	0	0	0	0	0	0	0	0	24
Total	17	115	7	63	19	3	28	34	3	52	9	4	4	358
Accom%	5	32	2	18	5	1	8	9	1	15	3	1	1	100

*Source:* Adapted from VTO (2018).

As most land tenure is customary or communal, it is hard for Ni-Vanuatu to access loan capital using customary land as collateral. This situation makes it difficult for them to become involved in the growing service and accommodation sector in Vanuatu, despite the VSTAP priority to encourage local Ni-Vanuatu in starting and owning tourism businesses (Ministry of Tourism, Industry, Commerce & Ni Vanuatu, 2014). In fact, a reserve list for tourism investment has been drawn up under the Investment Promotion Authority (2018) to enable local investment, but local participation remains very low. However, there are certain avenues where individuals and foreign investors can acquire a 75-year land lease. In the meantime, ongoing investment and re-investment by foreigners continues in new resorts, holiday homes and established resorts like Warwick and Holiday Inn.

In an article by Tony Wilson (2017) on the current state of the tourism industry in Vanuatu, (former) Vanuatu Hotels and Resorts Association CEO Bryan Death noted the impact the withdrawals of Air New Zealand and other airlines had had on the industry: “The reality of the current situation is that we are down overall against our best year

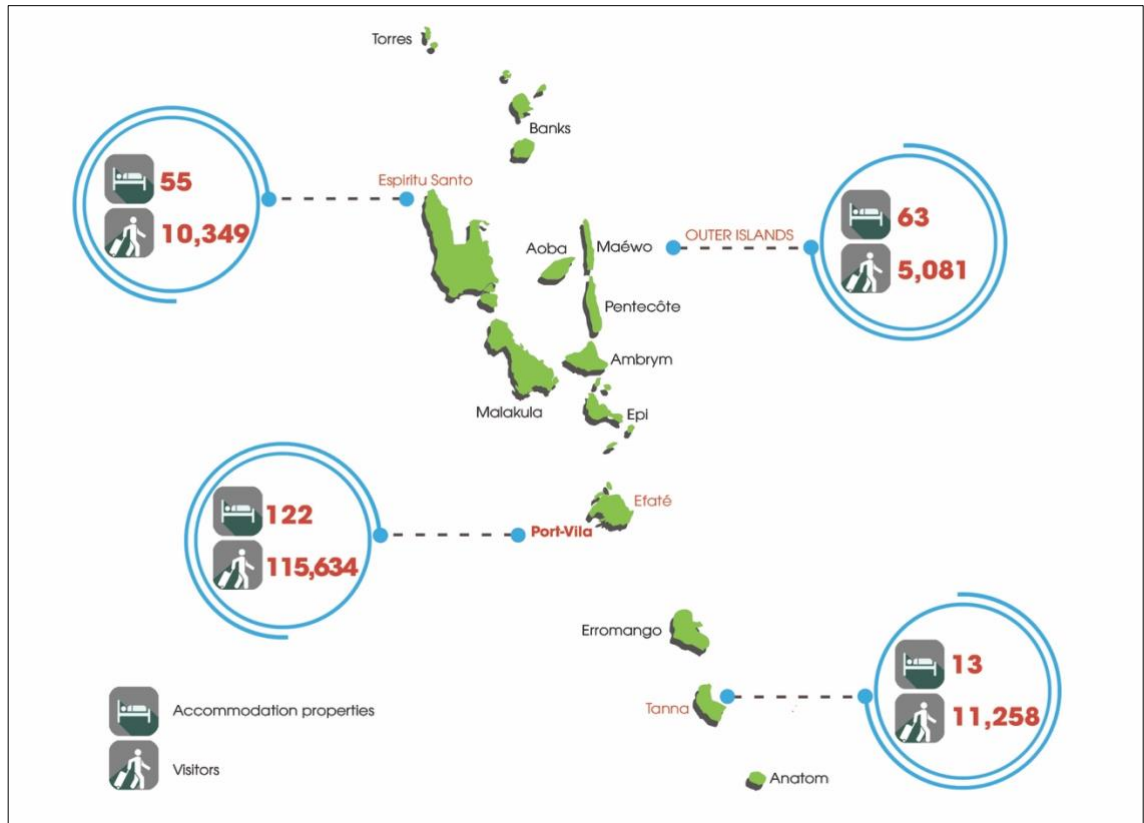
(2013) by some 13.4%.” Death said the other significant factor affecting occupancy was the growth in the number of rooms available over the past 16 years:

“There has been an increase in rooms available of about 147% on Éfaté since 2001, while the arrival numbers have only increased by 108% , and if you factor in a room density of, say, two people then the overall picture is less favourable, with the extra arrivals, numbers are not reflected in increased occupancies. Similarly, in Santo there has been a rise in room numbers, with the most recent data available showing some 352 rooms in Santo including the islands around Santo. Of the available rooms, 55% are classified as resort/hotel, and these number some 194 rooms. The rest show that 17% or 60 rooms are classified as basic, while categories including boutique, house, apartment and guest house make up the balance of the available accommodation. The trend line is telling the story of why we are unable to continue to increase over hotel occupancy rates.” (Death, quoted in Wilson, 2017)

To analyse the occupancy and growth problem in depth, it is first necessary to quantify what the accommodation sector in Vanuatu comprises.

A brief analysis of trends to the outer islands show there is growth in interisland traffic when accommodation facilities are available. Travel demand is a catalyst for accommodation investment and expansion. The current Vanuatu Statistics National Organisation 2019 report recognises this trend, and accommodation expansion, including unique accommodation facilities, and improved domestic services are part of the overall future plan to further develop tourism in the outer islands (World Travel & Tourism Council, 2019, p. 22). Figure 4.5 gives a snapshot of visitor arrivals and accommodation properties availability in the main island of Efate, as well as in the other islands.

**Figure 4.5 Visitor distribution and number of accommodation properties in 2018**



*Source:* Adapted from Vanuatu Statistics National Organisation, 2018.

#### 4.5 Chapter Summary

This chapter has provided a broad-ranging review of the development of tourism in Vanuatu, with a focus on air travel. The discussion shows that the industry has faced a number of challenges in recent years from which it has still to fully rebound. A range of tourism and related strategies are now focused on growing tourism in a way that will generate income for the local people and also spread the benefits of the industry across all the provinces.

The chapter confirms the central and catalytic roles of accommodation establishments in attracting travel demand, driving infrastructure improvements, and contributing to overall increased tourism benefits to Vanuatu. The lack of participation in the tourism industry by Ni-Vanuatu is clear to see in the accommodation sector with most local ownership concentrated in the local bungalow sector.

## **Chapter 5 Accommodation Choice**

### **– Key Visitor Characteristics**

This chapter examines the main characteristics of the visitors who stayed in various types of accommodation while visiting Vanuatu. The chapter reviews a range of quantitative data captured by the Vanuatu International Visitor Survey (IVS) during the period from January 2015 to December 2017. The accommodation categories used were provided by the Vanuatu Tourism Office.

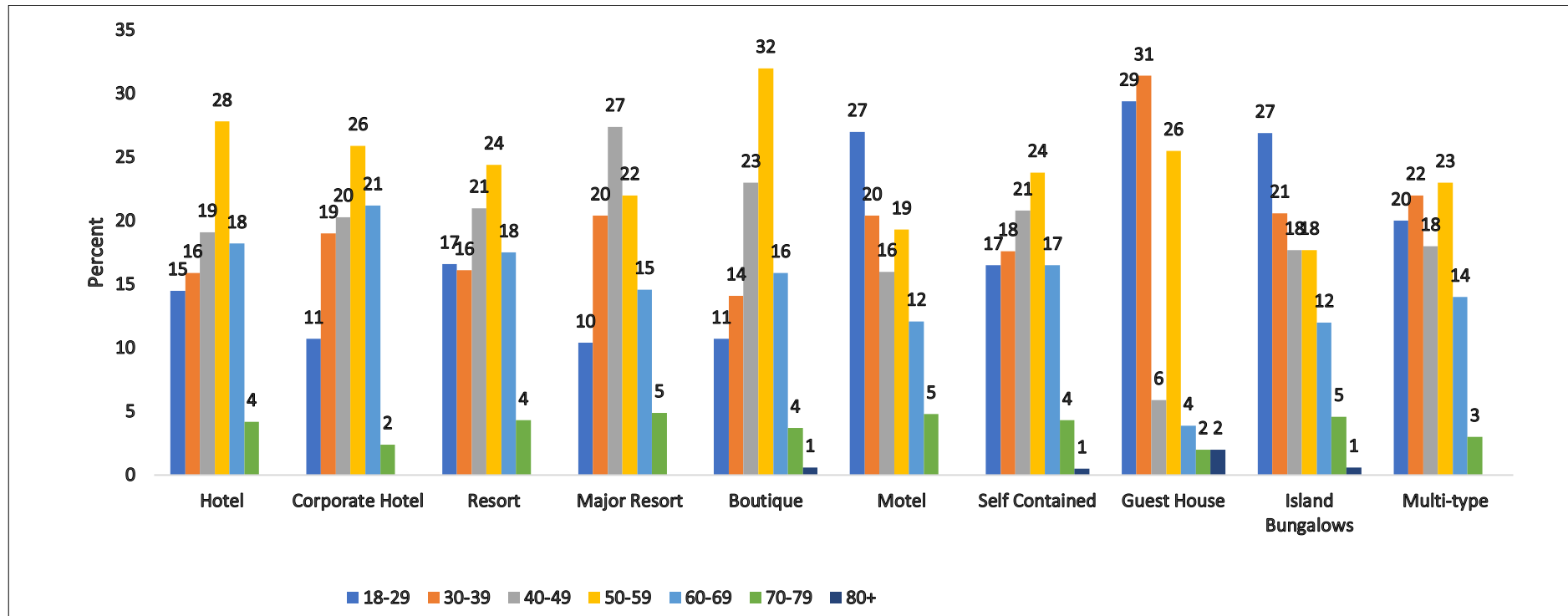
#### *5.1 Visitor Demographics*

Motels, Guest Houses and Island Bungalows tend to have the youngest age profile in terms of visitors, with Guest Houses having 60% of visitors aged under 40. Hotel and Resort age profiles tended to be older, with nearly 50% aged over 50 years and fewer than 35% aged under 40 years. The oldest age profile is seen in the Boutique Resorts with 50% aged over 50 and 32% in the 50–59 bracket (Figure 5.1).

The visitors who chose to stay in Hotels and Resorts had average household incomes ranging from US\$75,000 to US\$96,000. Those staying in Boutique Resorts have the highest average household income profiles of nearly US\$120,000 per year (Figure 5.2). Motel visitors had the lowest average annual household income, of US\$57,000. This was followed closely by those staying in Island Bungalows or Guest Houses (both in the mid-\$60,000 range).

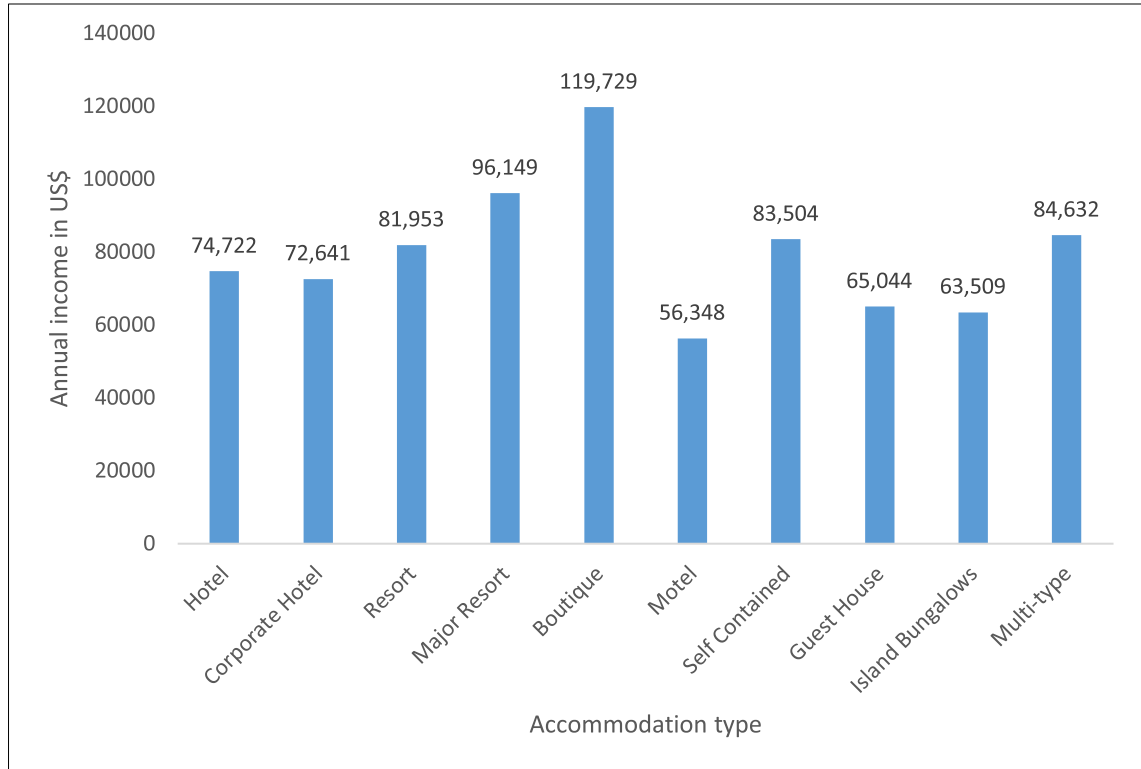
First-time visitors to Vanuatu comprise 60% of the visitor population (Milne, Li & Sun, 2018). Guest Houses and Island Bungalows are the most likely accommodation grouping to attract first time visitors followed by Multi-type accommodation. The Resort group have the highest return visitation from guests who have visited 2–3 times. Corporate Hotels and Hotels in Vanuatu are characterised by the greatest percentage of repeat visitation from those who have visited the nation more than three times. The Motel and Self-contained guest facilities demonstrate a consistent pattern of repeat visitors (Figure 5.3).

**Figure 5.1 Age profile of visitors to Vanuatu, January 2015-December 2017**



Source: International Visitor Survey data 2015–17.

**Figure 5.2 Average household income (US\$), January 2015–December 2017**

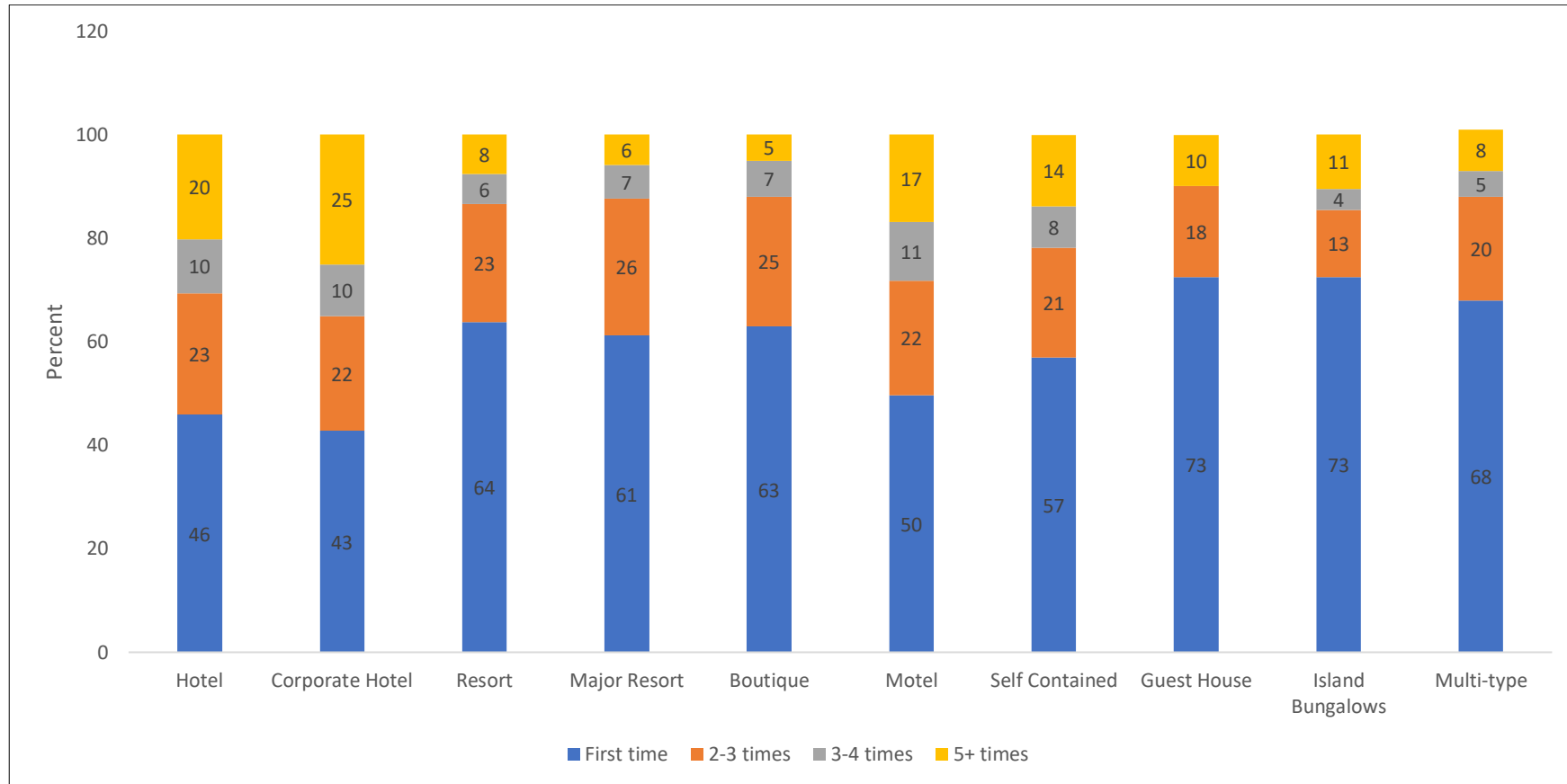


*Source:* International Visitor Survey data 2015–17.

The Australian market prefers Boutique and Major Resorts, whereas New Zealand visitors tend to choose Major Resorts and Self-contained facilities (Table 5.1). The long-haul market is more highly represented in Island Bungalows and Guest Houses – this is a reflection of their extended length of stay and their greater likelihood to visit outer islands (NZTRI, 2018, p. 4). Long-haul visitors are the most likely to stay in multiple types of accommodation. New Caledonian visitors tended to choose Corporate Hotels and Island Bungalows, with other Pacific visitors opting for Motel accommodation and Corporate Hotels. The latter group often travel for business and Motels and Corporate Hotels offer the right mix of facilities and value for money.



**Figure 5.3 Previous visits, January 2015–December 2017**



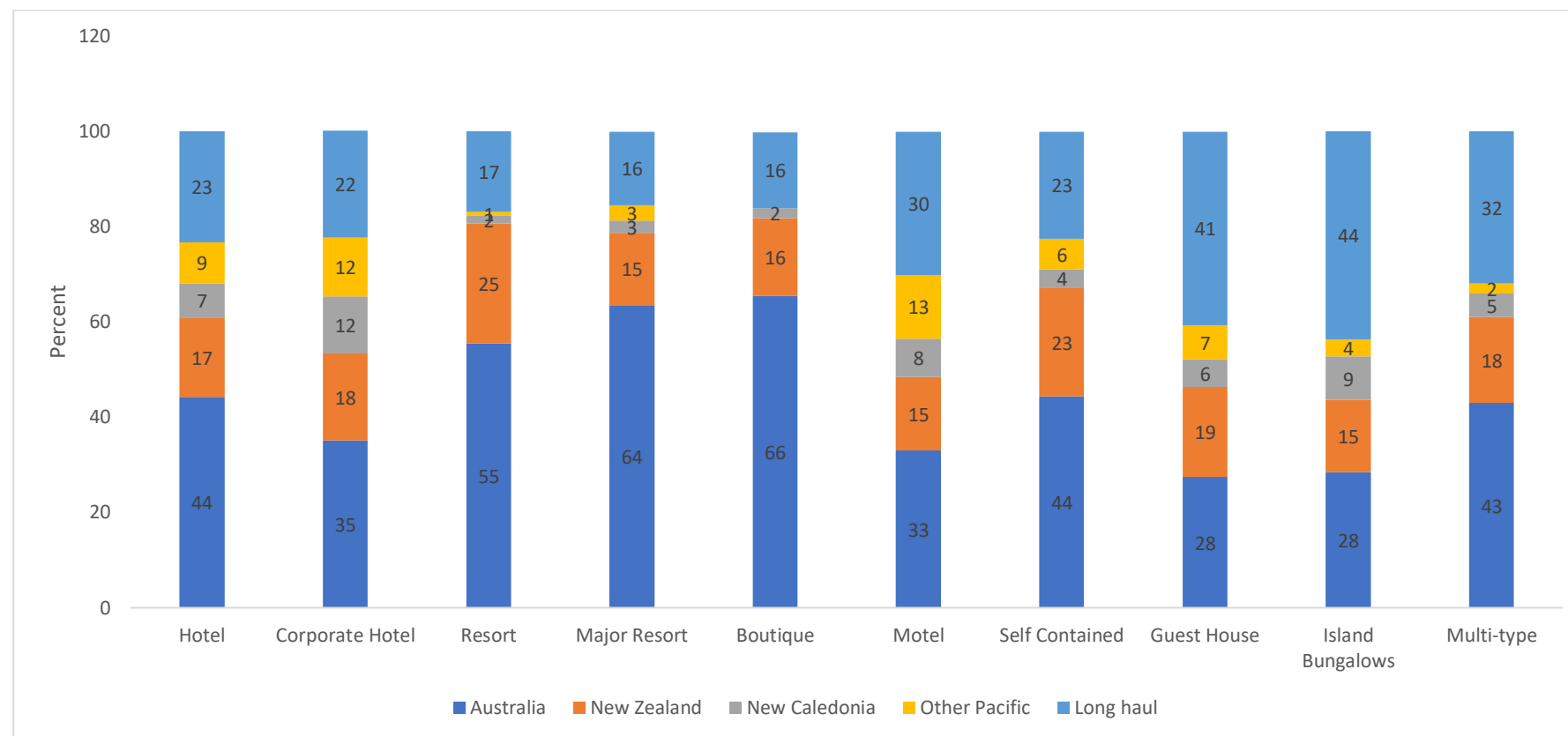
*Source:* International Visitor Survey data 2015–17.

**Table 5.1 Country of origin visitor market for Vanuatu and their top five choices of accommodation (January 2015–December 2017)**

<b>Country of origin</b>	<b>First choice</b>	<b>Second choice</b>	<b>Third choice</b>	<b>Fourth choice</b>	<b>Fifth choice</b>
<b>Australia</b>	Boutique	Major Resort	Island Bungalow	Hotel	Self-contained unit
<b>New Zealand</b>	Major Resort	Self-contained unit	Guest house	Multi-type	Corporate hotel
<b>Long-haul (Europe, USA, Asia)</b>	Island bungalow	Guest house	Multi-type	Motel	Boutique
<b>New Caledonia</b>	Corporate hotel	Island Bungalow	Motel	Hotel	Multi-type
<b>Other Pacific countries</b>	Motel	Corporate hotel	Hotel	Guest house	Boutique

*Source:* Vanuatu International Visitor Survey data 2015–17.

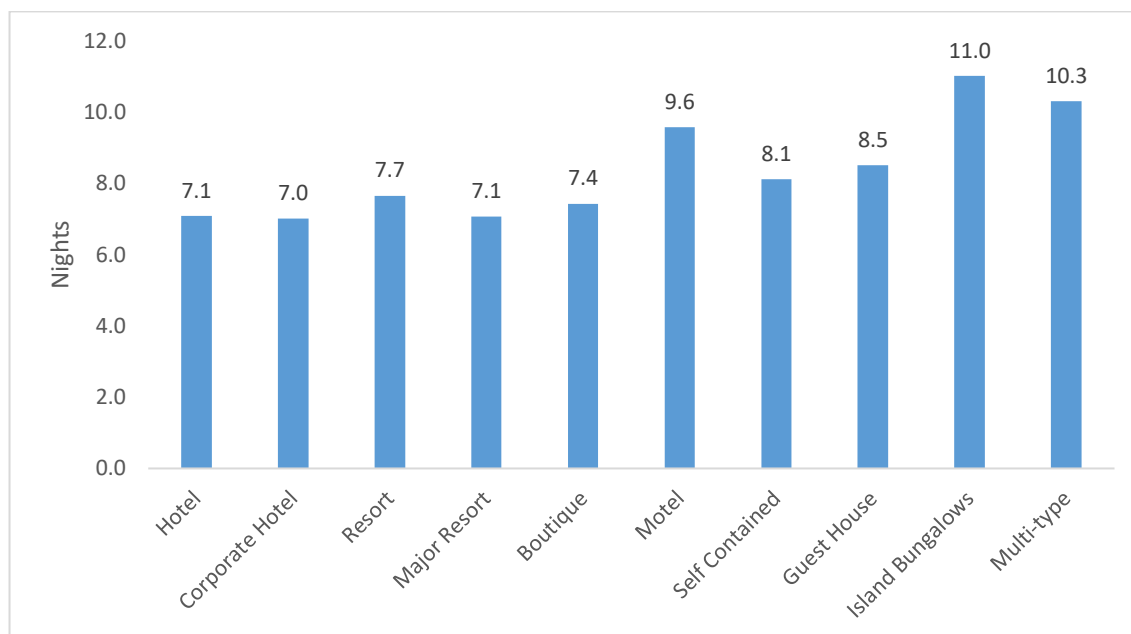
**Figure 5.4 Different accommodation types used by visitors in Vanuatu from key market areas, January 2015–December 2017**



*Source:* International Visitor Survey data 2015–17.

Visitors staying in Island Bungalows and in Multi-type accommodation facilities tend to stay longer than others (11 nights and 10.3 nights, respectively). In contrast, Motel guests, visitors to Guest Houses and Self-contained units stayed 8.1 and 9.6 nights, respectively. Visitors staying in accommodation facilities with higher daily rates (Boutique, Major Resorts, Resorts, Corporate Hotels and Hotels) stayed for an average of 7 nights (NZTRI, 2018, p. 10) (Figure 5.5).

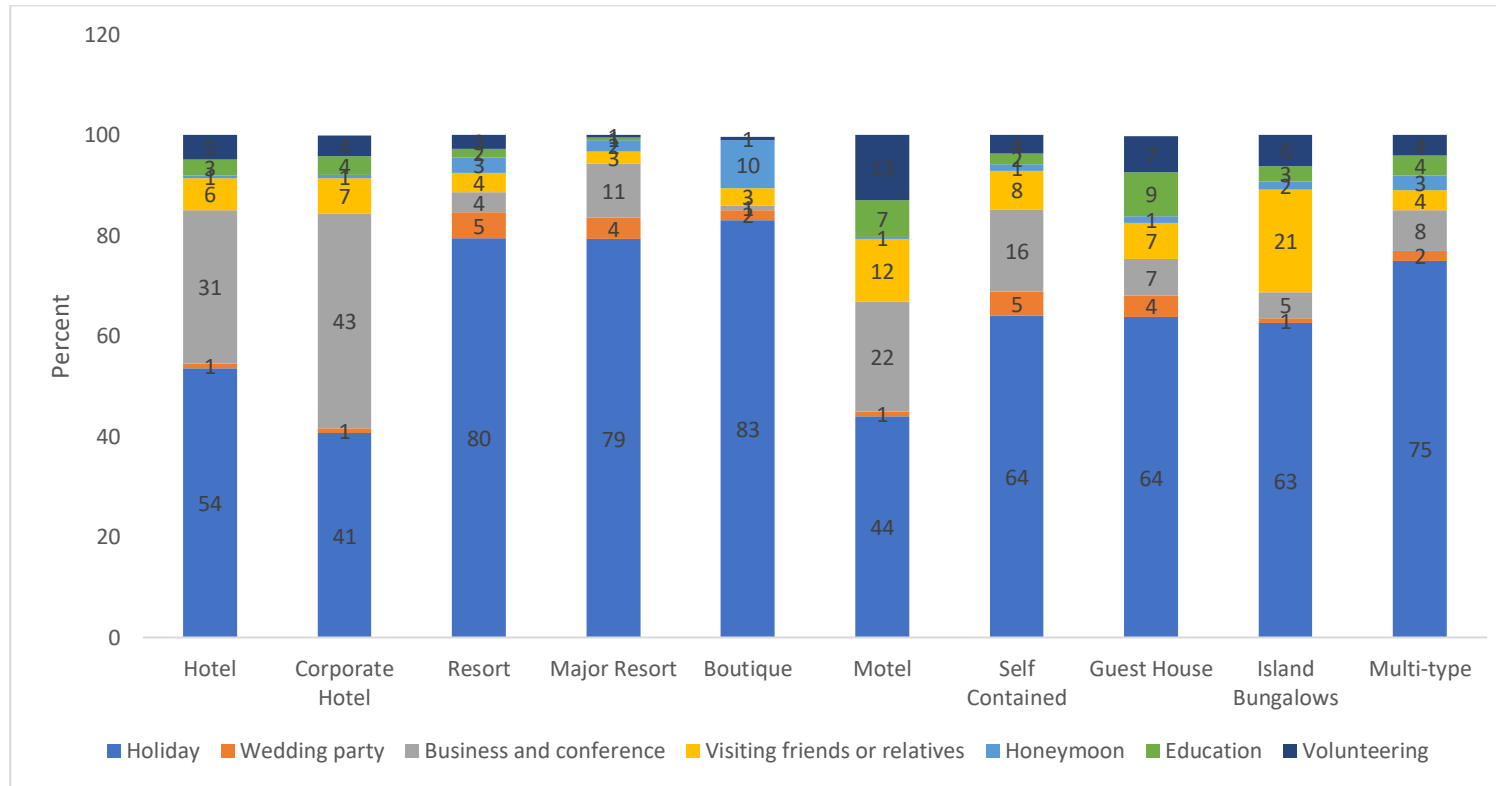
**Figure 5.5 Vanuatu visitors' average length of stay (nights), January 2015–December 2017**



*Source:* International Visitor Survey data 2015–17.

The Resorts, Boutique and Multi-type accommodation segments are characterised by a clear dominance of holiday visitors. Hotels and Corporate Hotels rely far more heavily on business and conference visitors, followed by the Motel and Self-contained facilities. Guests visiting Vanuatu as part of a wedding party tend to choose Resorts, Major Resorts, Self-contained accommodation and Guest Houses (Figure 5.6). The VFR market tends to be most heavily represented in the Island Bungalow, Motel, Guest House and Self-contained categories. The Resorts, and particularly the Boutique accommodation, were most likely to attract honeymoon visitors. Visitors travelling for education and volunteering purposes mainly choose to stay in Motels or Guest Houses.

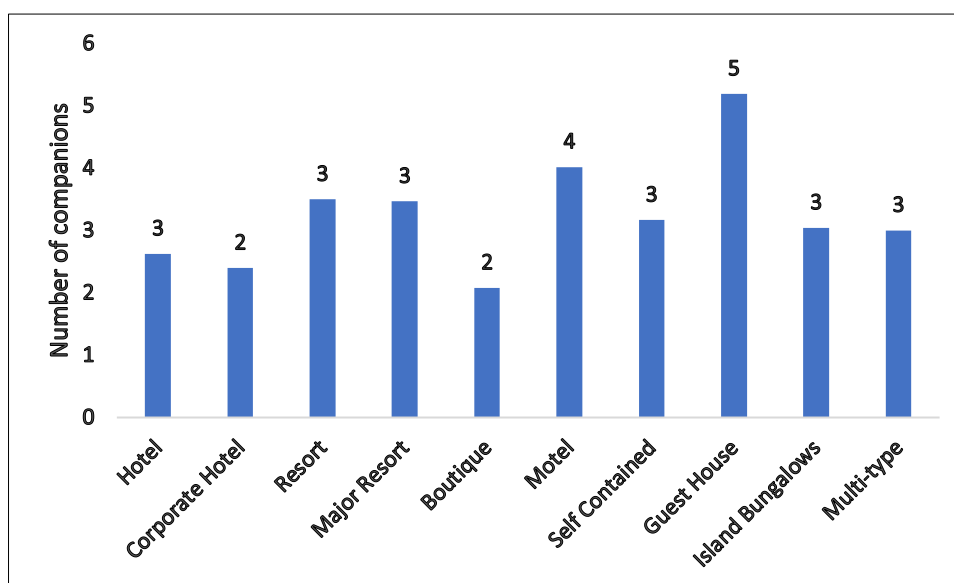
**Figure 5.6 Purpose of visit, January 2015–December 2017**



*Source:* International Visitor Survey data 2015–17.

Visitors travelling with others staying in Corporate Hotel and Boutique accommodation had an average of two travel companions (including the survey respondent); those staying in the Hotels, Resorts, Self-contained accommodation and Island Bungalows travelled with, on average in a group of three companions; in Motels, the average was four companions; and visitors staying in Guest Houses averaged five companions (Figure 5.7).

**Figure 5.7 Average number of travel companions per accommodation type in Vanuatu, January 2015–December 2017**



*Source:* International Visitor Survey data 2015–17.

Those staying in major Resorts and Corporate Hotels are almost entirely focused on the main island of Efate. By contrast, 61% of Island Bungalow visitors spent time on Tanna and 55% of Multi-type visitors. Forty-six per cent of the visitors to Espiritu Santo stayed in Multi-type accommodation.

**Table 5.2 Percentage of islands visited**

	<b>Efate (Port Vila)</b>	<b>Espiritu Santo</b>	<b>Tanna</b>	<b>Malekula</b>	<b>Ambrym</b>	<b>Pentecost</b>	<b>Erromango</b>	<b>Other</b>
Hotel	97	13	8	2	2	1	1	6
Corporate Hotel	100	4	4	1	1	1	0.3	5
Resort	98	7	7	1	0.3	0.4	0.1	7
Major Resort	100	1	4	0.3	1	0.1	0	3
Boutique	94	7	16	0	1	1	0.2	7
Motel	96	20	7	3	4	2	0.0	12
Self- Contained	99	5	3	1	0.1	1	0.1	5
Guest House	80	30	13	7	10	1	1	16
Island Bungalows	75	36	61	8	5	3	0	20
Multi-type	99	46	55	4	4	3	0.2	12

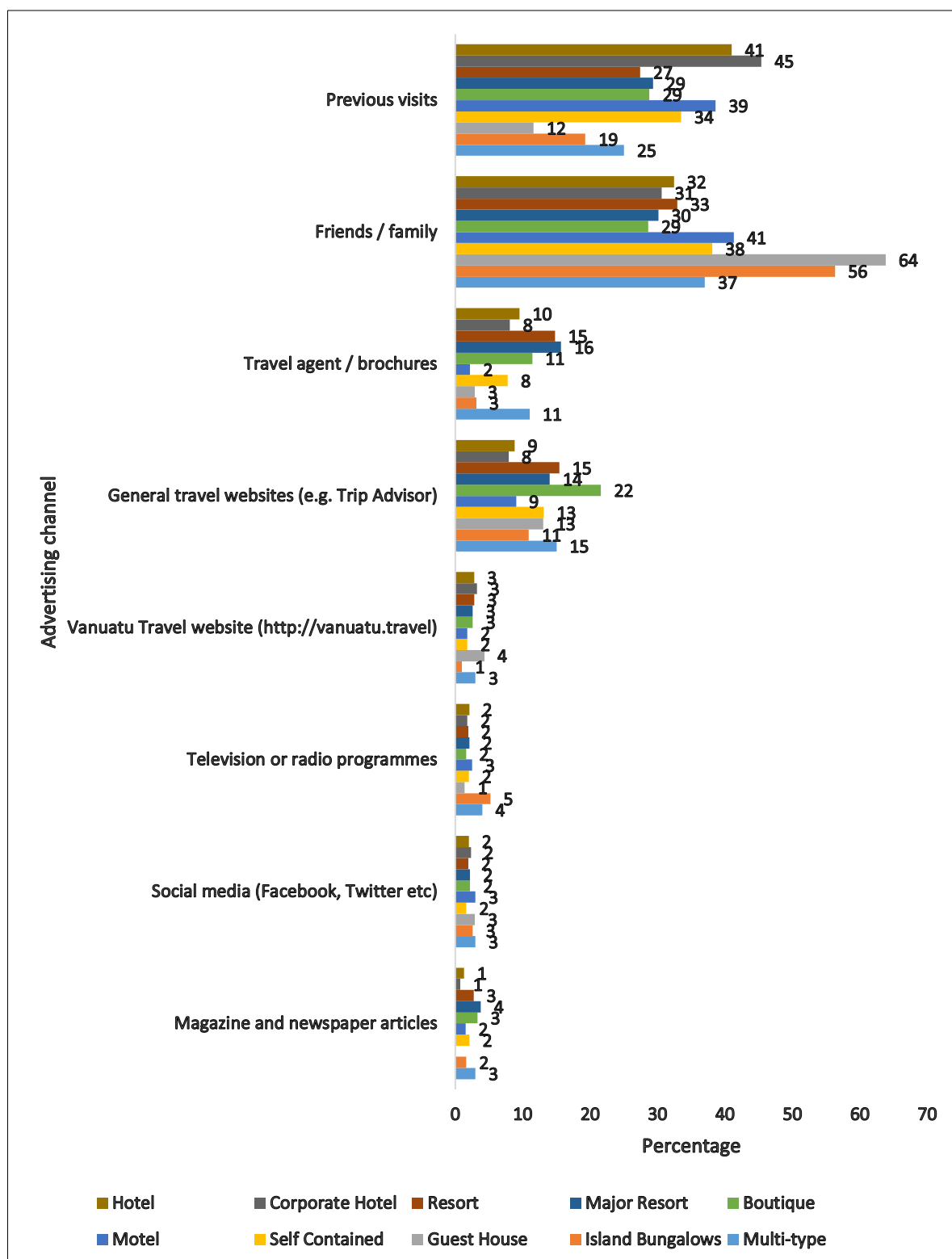
*Source:* International Visitor Survey data 2015–17.

### *5.2 Factors that Influence Visitor Decision Making*

Factors that influence the decision to come to Vanuatu vary significantly between the different accommodation types. Guest House and Island Bungalow visitors are strongly influenced by word-of-mouth advertising from family and friends. In contrast, Resort guests rely on travel agents and brochures as significant sources of information about Vanuatu, whereas the Boutique visitor's destination and product awareness is more likely than other segments to come from online travel websites (Figure 5.8).

The majority of visitors make their own bookings and travel arrangements; for example, Island Bungalow and Boutique guests made their own travel arrangements utilising online travel websites. It is particularly interesting to see that more Boutique guests made their own travel arrangements than purchased a pre-paid travel package through a travel agent. This is the reverse of the purchasing behaviour exhibited by Resort guests. Travel arrangements made by others (including business agents, etc.) was highest for those staying in Corporate Hotels (Figure 5.9).

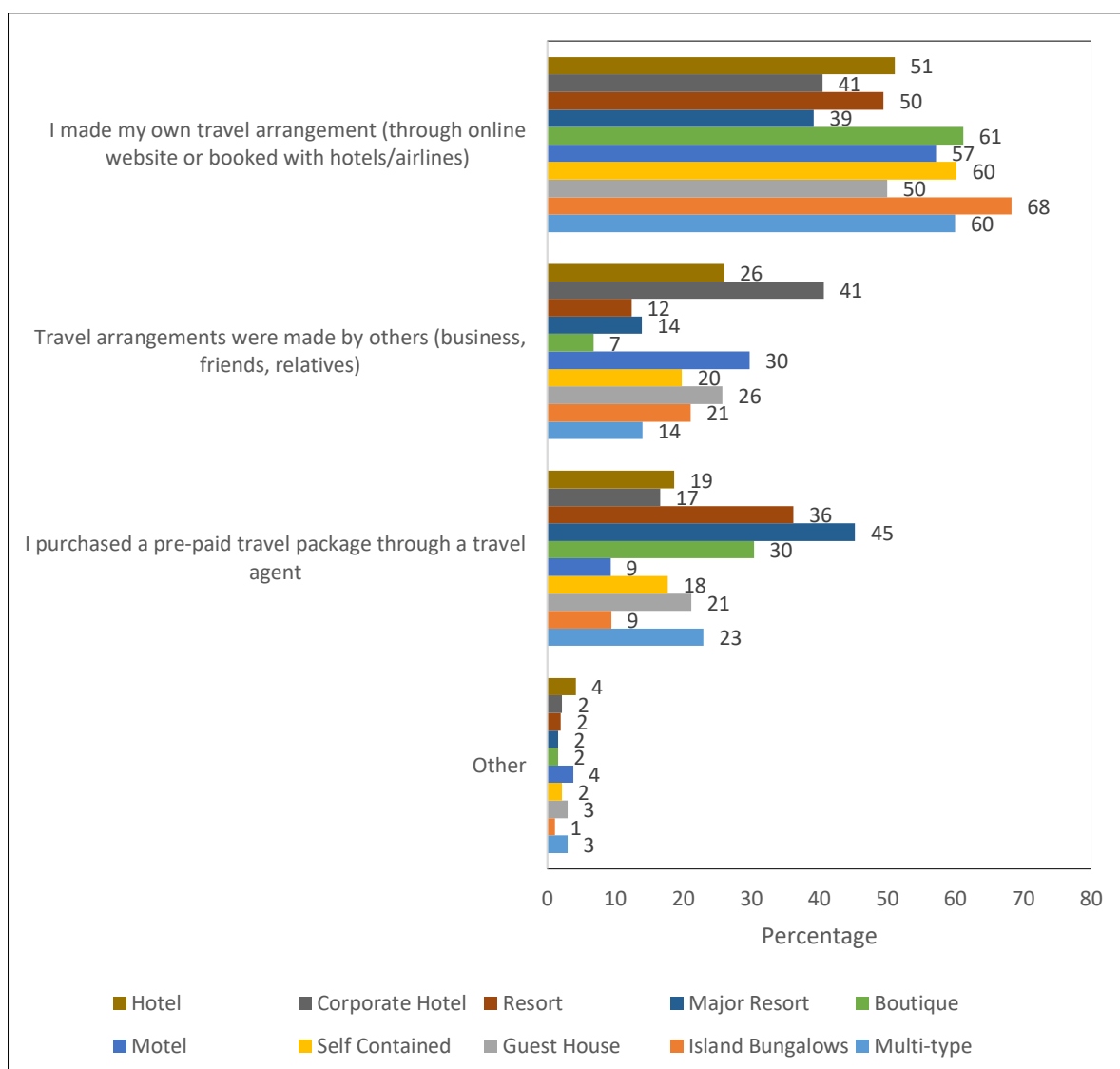
**Figure 5.8 How did you find out about Vanuatu as a destination?**



*Source:* International Visitor Survey data 2015–17.



**Figure 5.9 Travel purchase behaviours of Vanuatu overseas visitors, January 2015–December 2017**



*Source:* International Visitor Survey data 2015–17.

Table 5.3 and Figure 5.10 show a large range in terms of the mean scores that visitors gave the various activities that attracted them to the island group. The Boutique visitor selected Vanuatu as a destination to relax, experience the quiet tropical environment and enjoy activities such as swimming and snorkelling at the beach. These choices reflected the visitors' desire for privacy and tranquillity, in line with the exclusivity characteristic of the Boutique visitor. Visitors choosing Vanuatu as a destination for culture and history were a major component of the Guest House, Self-contained and Island Bungalow market segments. This group selected natural attractions and photography as

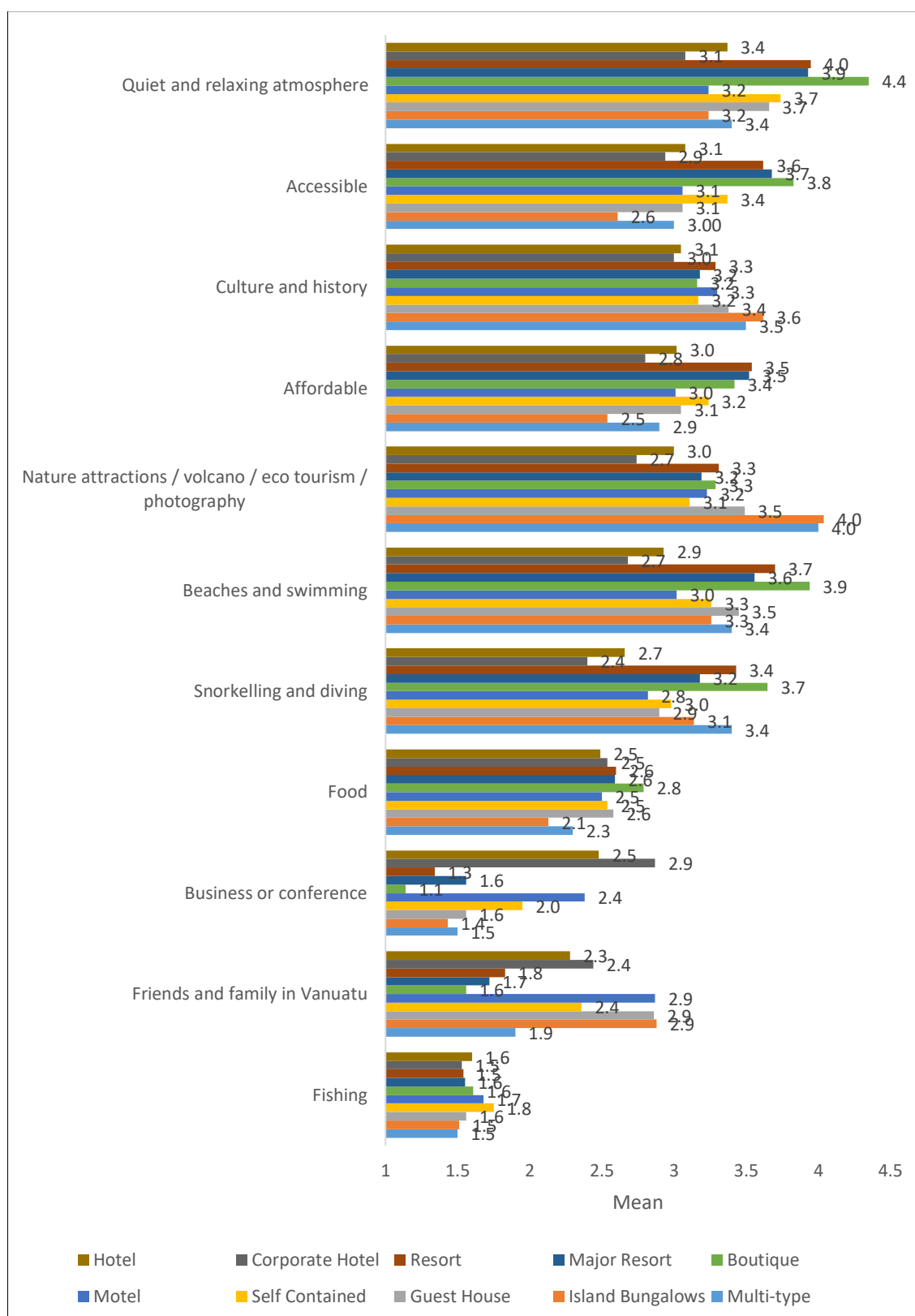
reasons for visiting Vanuatu, whereas Hotel guests rated these reasons as less significant.

**Table 5.3 Top three factors that influence the decision to visit Vanuatu, by accommodation type**

<b>Accommodation type</b>	<b>Top 1</b>	<b>Top 2</b>	<b>Top 3</b>
<b>Hotel</b>	Quiet and relaxing atmosphere	Accessibility	Culture and history
<b>Corporate Hotel</b>	Quiet and relaxing atmosphere	Culture and History	Accessibility
<b>Resort</b>	Quiet and relaxing atmosphere	Accessibility	Affordability
<b>Major Resort</b>	Quiet and relaxing atmosphere	Accessibility	Beaches
<b>Boutique Resort</b>	Quiet and relaxing atmosphere	Beaches	Accessibility
<b>Motel</b>	Culture and history	Quiet and relaxing atmosphere Nature attractions/ volcano/ eco-tourism photography	Accessibility
<b>Self Contained</b>	Quiet and relaxing atmosphere	Accessibility	Beaches
<b>Guest House</b>	Quiet and relaxing atmosphere	Nature attractions/ volcano/ eco-tourism/ photography Beaches	Culture and history
<b>Island Bungalows</b>	Nature attractions/ volcano/ eco-tourism/ photography	Culture and history	Beaches
<b>Multi-type</b>	Nature attractions/ volcano/ eco-tourism/ photography	Culture and history	Quiet and relaxing atmosphere Beaches

*Source:* Adapted from International Visitor Survey 2015-17.

**Figure 5.10 The reasons why visitors choose Vanuatu as a destination, January 2015–December 2017**



Source: Vanuatu International Visitor Survey 2015-17.

### *5.3 Visitor Expenditure*

Table 5.4 shows visitor spend related to visitor accommodation choice. Prepaid expenditure varied considerably between visitors staying in different accommodation types, with Boutique visitors spending by far the most. The range of costs by other types of accommodation also differed significantly. For example, Guest House users exhibited the lowest prepaid spend, at approximately 30% lower than hotel guests' prepaid spend, whereas visitors who stayed in Island Bungalows had a higher prepaid spend than those who stayed in Guest Houses, which can be explained in part by spend on domestic airfares. For Boutique accommodation, guest expenditure is higher despite a shorter length of stay. Similarly, guests staying in a Guest House in Vanuatu spend more per visit as they tend to stay longer.

In-country spend per person per trip differed by accommodation type. The Multi-type guests had the highest in-country spend per person per trip (US\$979) which reflects that these guests stayed at a variety of accommodation types, had the second-longest length of stay in Vanuatu and like to experience a variety of attractions and activities. The Major Resort and Resort visitors had the lowest in-country spend per person per trip (at US\$620 and US\$671, respectively) yet their prepaid expenditure was comparable to other groups'.

By combining pre-paid spend and in-country spend, we can estimate the economic impact per visit associated with different accommodation types. The lowest spend per person per day occurred among the Motel and Island Bungalow groups, and the highest spend among the Boutique Resort group. Overall, it is clear that despite their relatively short length of stay, Boutique accommodation guests bring the most direct economic benefit per visit, and Resort visitors provide the lowest economic impact per visit. Accommodation facilities linked to relatively longer lengths of stay such as Motels, Island Bungalows and Multi-type accommodation are visited by overseas guests who yield a relatively high economic impact per visit.

Prepaid expenditure is whereby payment is made in advance of expected travel for example a business traveller prepaid by their company or a leisure traveller purchasing a prepaid package tour and securing their arrangements such as flights, accommodation, transfers and tours prior to arrival at their destination.

62.5% level of prepaid expenditures (US\$) flowing back to Vanuatu economy per person per trip (Table 5.4) is calculated in order to give a more accurate estimate of the level of leakage (37.5%) of the visitor expenditures in Vanuatu. The highest amount in terms of prepaid expenditure (US\$) flowing back to Vanuatu is returned from the Boutique visitor (US\$1,282) whilst the resort visitor( US\$735) is the lowest. Both these types of visitors to Vanuatu are in the higher group to purchase a pre paid travel package through a travel agent (Figure 5.9). Needless to say that even direct expenditures (accommodation, services, local transport, meals, shopping) in the destination also leak out from the local economy in terms of local destination expenditures to sustain and service the industry as well.

**Table 5.4 Average visitor expenditure in Vanuatu (January 2015–December 2017)**

<b>Expenditure data point</b>	<b>Hotel</b>	<b>Corporate Hotel</b>	<b>Resort</b>	<b>Major Resort</b>	<b>Boutique</b>	<b>Motel</b>	<b>Self-contained unit</b>	<b>Guest House</b>	<b>Island Bungalow</b>	<b>Multi-type accommodation</b>
<b>Length of stay (nights)</b>	7.1	7.0	7.7	7.1	7.4	9.6	8.1	8.5	11.0	10.5
<b>Prepaid expenditure (US\$) per person per trip</b>	1,304	1,295	1,176	1,337	2,052	1,216	1,221	1,097	1,228	1,539
<b>62.5% prepaid expenditure (US\$) flowing back to Vanuatu economy per person per trip</b>	815	809	735	836	1,282	760	763	686	767	962
<b>Prepaid expenditure (US\$) flowing back to Vanuatu economy per person per day</b>	115	115	96	118	173	79	94	81	70	93

<b>In-country spend (US\$) per person per trip</b>	845	794	671	620	880	687	729	904	772	979
<b>In-country spend (US%) per person per day</b>	119	113	88	88	118	72	90	106	70	95
<b>Total spend (US\$) per person per visit</b>	1,660	1,603	1,406	1,456	2,162	1,447	1,492	1,590	1,540	1,940
<b>Total spend (US\$) per person per day</b>	234	229	184	206	291	151	184	187	140	188

*Source:* International Visitor Survey data 2015-17.

## *5.4 Visitor Satisfaction*

The sustained growth and development of tourism is reliant on receiving positive visitor feedback and having a good reputation. To optimise visitor satisfaction, policymakers and tourism providers need to understand that accommodation is a central foundation of tourism development and to further understand related visitor satisfaction.

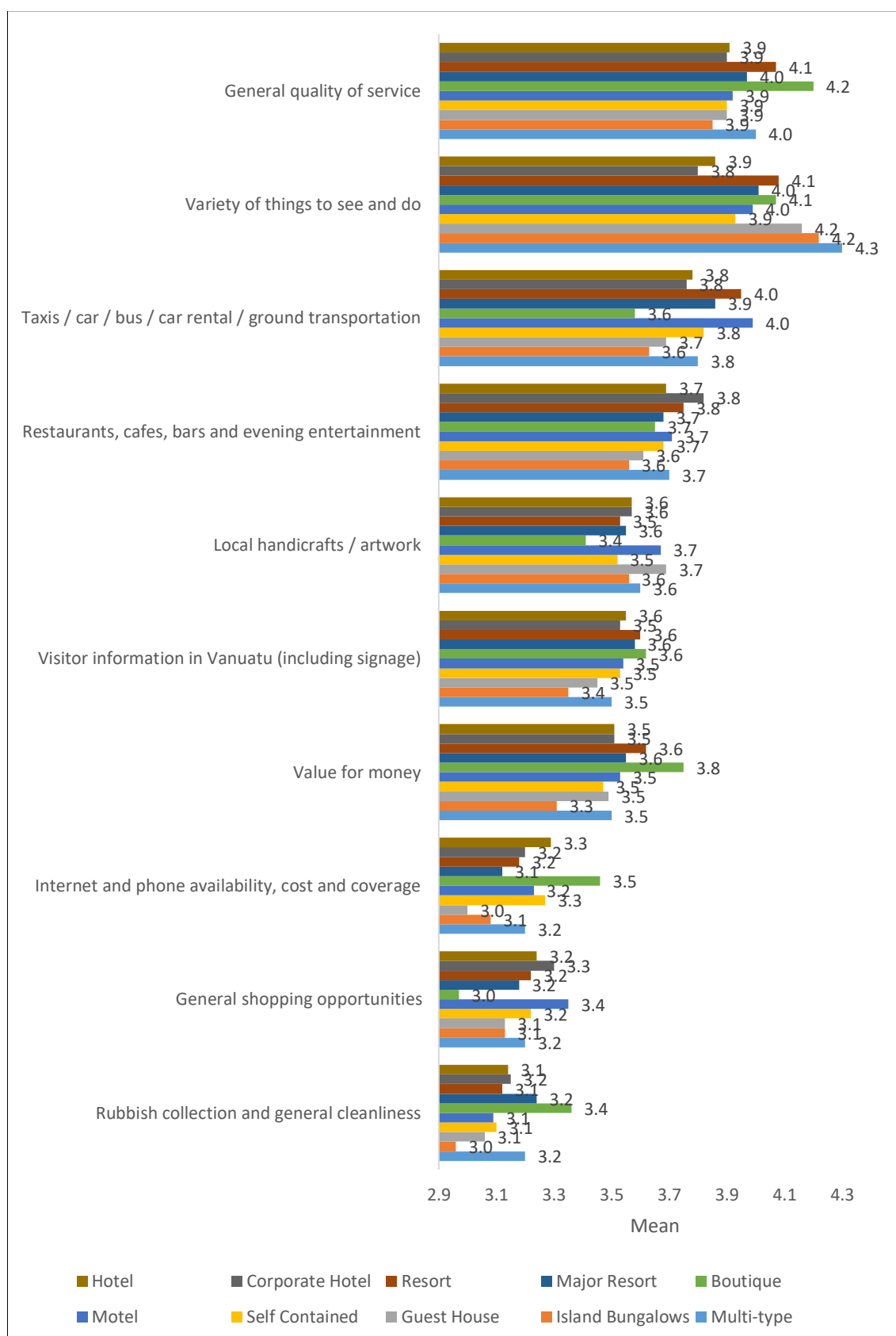
Figure 5.11 reveals that Boutique accommodation has the highest level of visitor satisfaction. This accommodation subsector set themselves apart from the other accommodation types in the following areas: general quality of service, value for money, internet and phone availability, cost and coverage, rubbish collection and general cleanliness. Visitors who stayed in Multi-type accommodation, Guest Houses and Island Bungalows rated the variety of things to see and do highly. Motel guests gave both the local handicrafts and artwork, and general shopping opportunities the highest score. The Guest House visitors were the least satisfied with two areas while visiting Vanuatu: the rubbish collection and general cleanliness, and value-for-money for services. The Resort and Hotel guests were mostly satisfied with all the services, except for internet and phone availability, cost and coverage; general shopping opportunities; and rubbish collection and general cleanliness.

Figure 5.12 shows that visitors staying in Boutique accommodation, Self-contained units and Guest Houses gave consistently high scores for satisfaction with overall value for money, with an average score of 4.2 out of 5. Visitors staying at a Resort also scored overall value for money highly (4.1) whereas visitors staying in Island Bungalows in the outer islands, and in Hotels and Corporate Hotels gave lower scores.

Figure 5.13 reveals that visitors using Boutique Resorts exhibited the highest levels of satisfaction in the areas related to their accommodation such as level of service provided, value for money and the quality, availability and maintenance of facilities. This indicates that Boutique accommodation, which is a niche market, is catering effectively for the upmarket visitor, even given that they have higher expectations of service. In contrast, the Hotel, Island Bungalow and Motel visitors were the least satisfied with their accommodation and the level of service provided, value for money, and in particular the standard of the facilities.

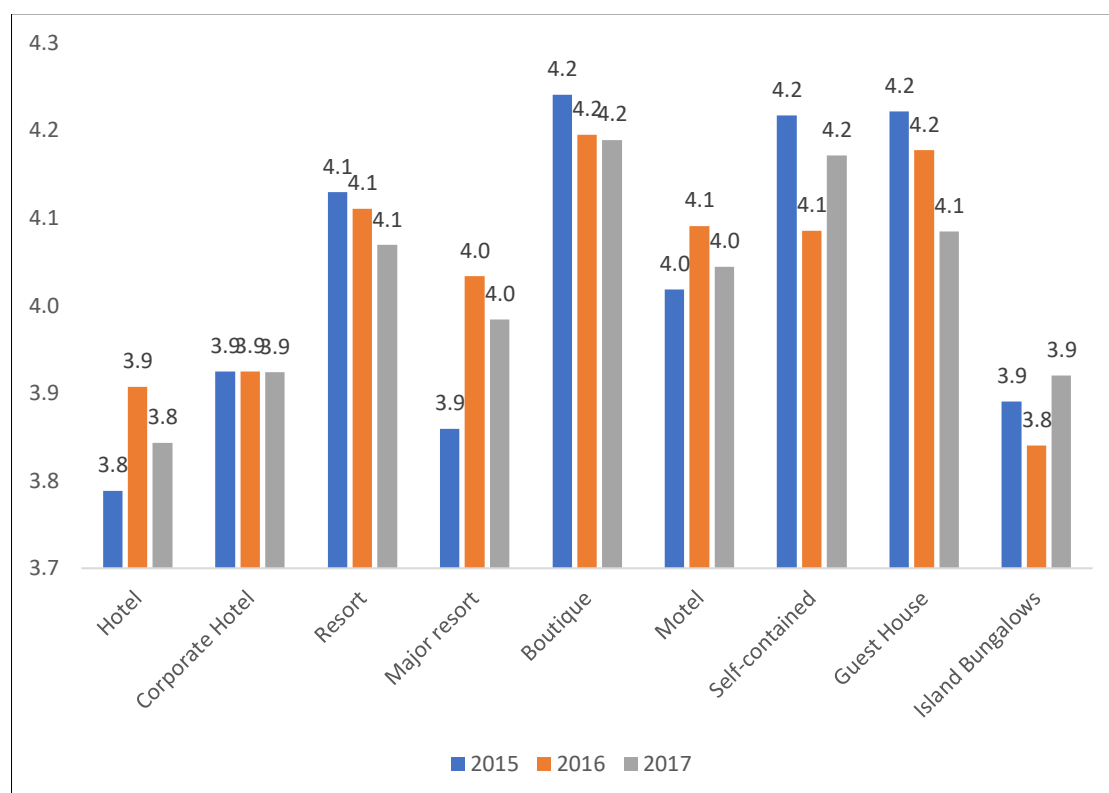


**Figure 5.11 Visitor satisfaction with services in Vanuatu, January 2015–December 2017**



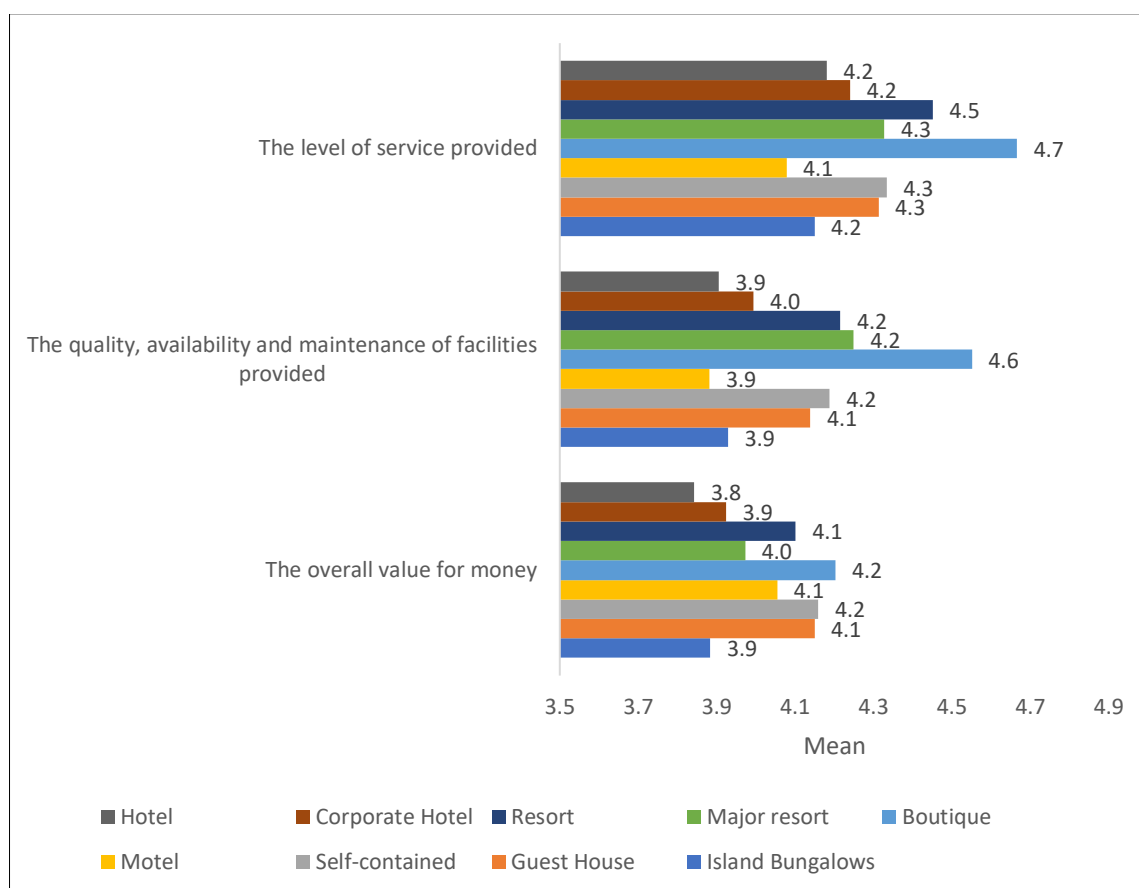
Source: International Visitor Survey data 2015-17.

**Figure 5.12 Satisfaction with overall value for money, January 2015–December 2017**



*Source:* International Visitor Survey data 2015-17.

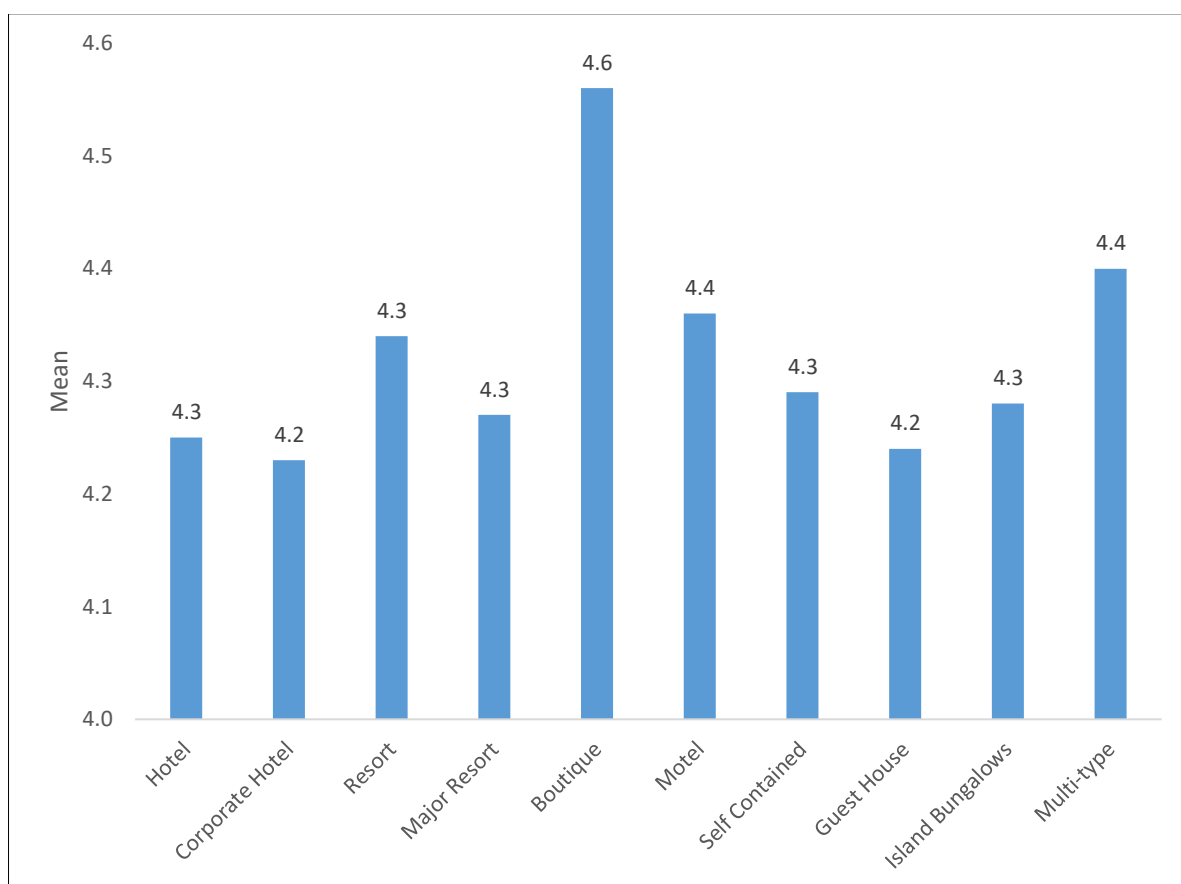
**Figure 5.13 Satisfaction with different types of accommodation, January 2015–December 2017**



*Source:* International Visitor Survey data 2015-17.

Boutique guests gave the highest score (4.6 out of 5) for overall satisfaction (Figure 5.14). Guest House visitors’ responses yielded the lowest score – a satisfaction level of 4.2. All the scores from the other accommodation types fell between these ratings.

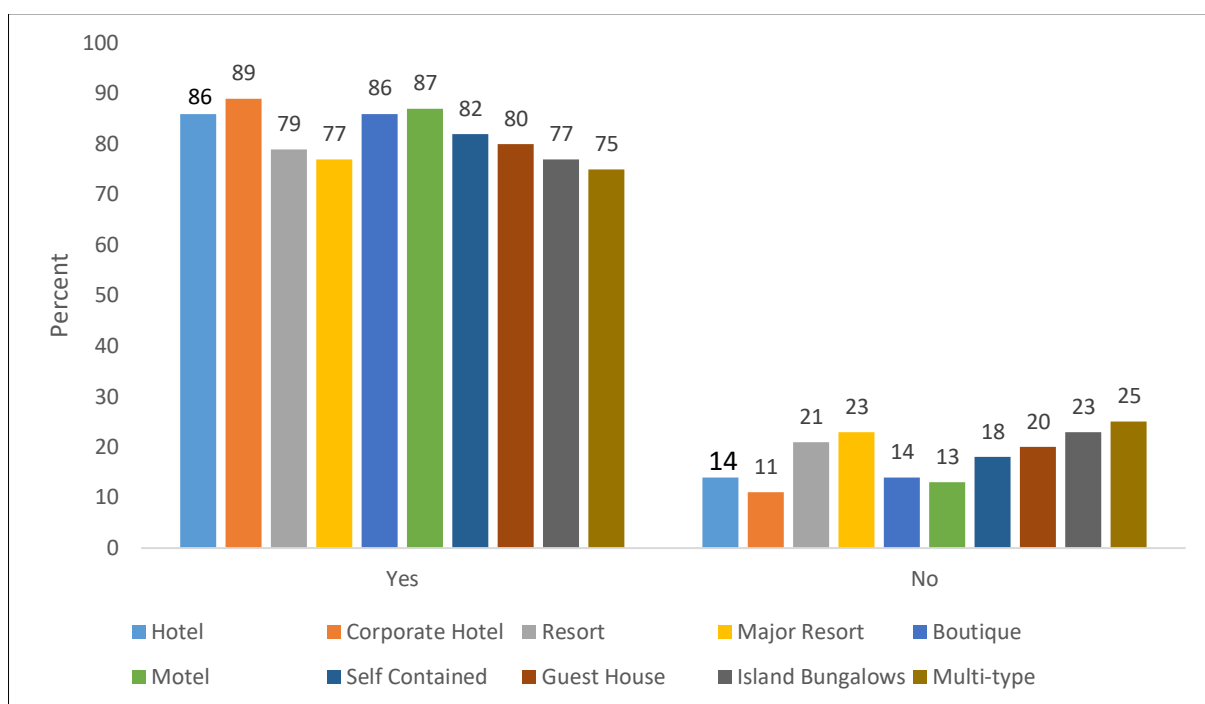
**Figure 5.14 Overall satisfaction with Vanuatu visit across accommodation types, January 2015–December 2017**



*Source:* International Visitor Survey data 2015-17.

When asked if they would like to return to Vanuatu in the next 5 years, the guests who stayed in Hotels and Corporate Hotels, Boutique facilities and Motels answered most favourably. Those who responded the least positively were guests predominantly using the Multi-type, Island Bungalow, Major Resort and Resort types of accommodation on the outer islands (5.15).

**Figure 5.15 Guests' willingness to return to Vanuatu by accommodation type, January 2015–December 2017**



*Source:* International Visitor Survey data 2015-17.

## Chapter 6: Exploring the Qualitative Survey Data

This chapter explores the qualitative “long answer” dimensions of the Vanuatu IVS. This dimension of the survey has tended to receive less attention than the more quantitative dimensions of the survey. As with the previous chapter, the focus is on understanding the visitor profiles associated with different accommodation types. The focus of the chapter is on visitor responses to what they found most appealing about their visit to Vanuatu, what they found least appealing, and also what they would suggest as improvements.

Following a review of the findings in Chapter 5, a decision was made to regroup the 10 accommodation categories used by the VTO into five broader groups when discussing visitor reactions to the accommodation itself: 1) Hotels (both regular and corporate); 2) Resorts (regular, major and boutique); 3) Motels including self-contained units; 4) Guest Houses and Island Bungalows; and 5) Multi-type. This approach was taken to allow a less fragmented way of analysing the qualitative dimensions of the IVS and to support the generation of a reduced range of visitor profiles.

The chapter begins with a review of the general themes emerging from the least and most appealing responses and visitor feedback on the improvement question. I review the degree to which the prevalence of comments varies by accommodation type. The second part of the chapter focuses on comments that are directed specifically at the accommodation experience including features of the accommodation itself; for example, internet access, health and safety, staff service and quality of facilities.

Respondents’ verbatim comments are used to illustrate their attitudes and feelings regarding their visit to Vanuatu. Quotes have been selected to be representative of commonly stated views or to identify divergent perspectives that add insights into the range of perspectives offered.

### *6.1 Key Themes Emerging from the Data*

#### *6.1.1 The most appealing aspects of Vanuatu*

Guests consistently identified the most appealing aspects of their visits as their interactions with local people, experiences gained in the natural environment accessed

via guided tours and outdoor activities, both on land and in marine and estuarine areas, other tourist attractions, and the overall tropical atmosphere (Figure 6.1).

Vanuatu is viewed very favourably as a destination inhabited by friendly people with unique aspects to their culture, and as a place very accessible to visitors. The landscape and the tropical environment, flora and fauna were considered to be key attractions. Unique activities on show to visitors also generated favourable ratings.

The Resort visitors were fairly consistent with what they considered the most appealing aspects while visiting Vanuatu. However, within this group, the Boutique visitor tended to particularly appreciate the atmosphere and their accommodation.

The Hotel visitors' similarity on the most appealing aspects is evident in Figure 6.1. The exception to this, though, is the Corporate Hotel visitors who were enticed by the food and beverage more than any other group. The Corporate Hotel visitor was less focused than the regular hotel visitor on the environment and the level of service

Within the Motel group, the self-contained unit visitors appreciated the atmosphere of Vanuatu more than the Motel visitor, who found the culture and history of Vanuatu to be the most appealing aspect.

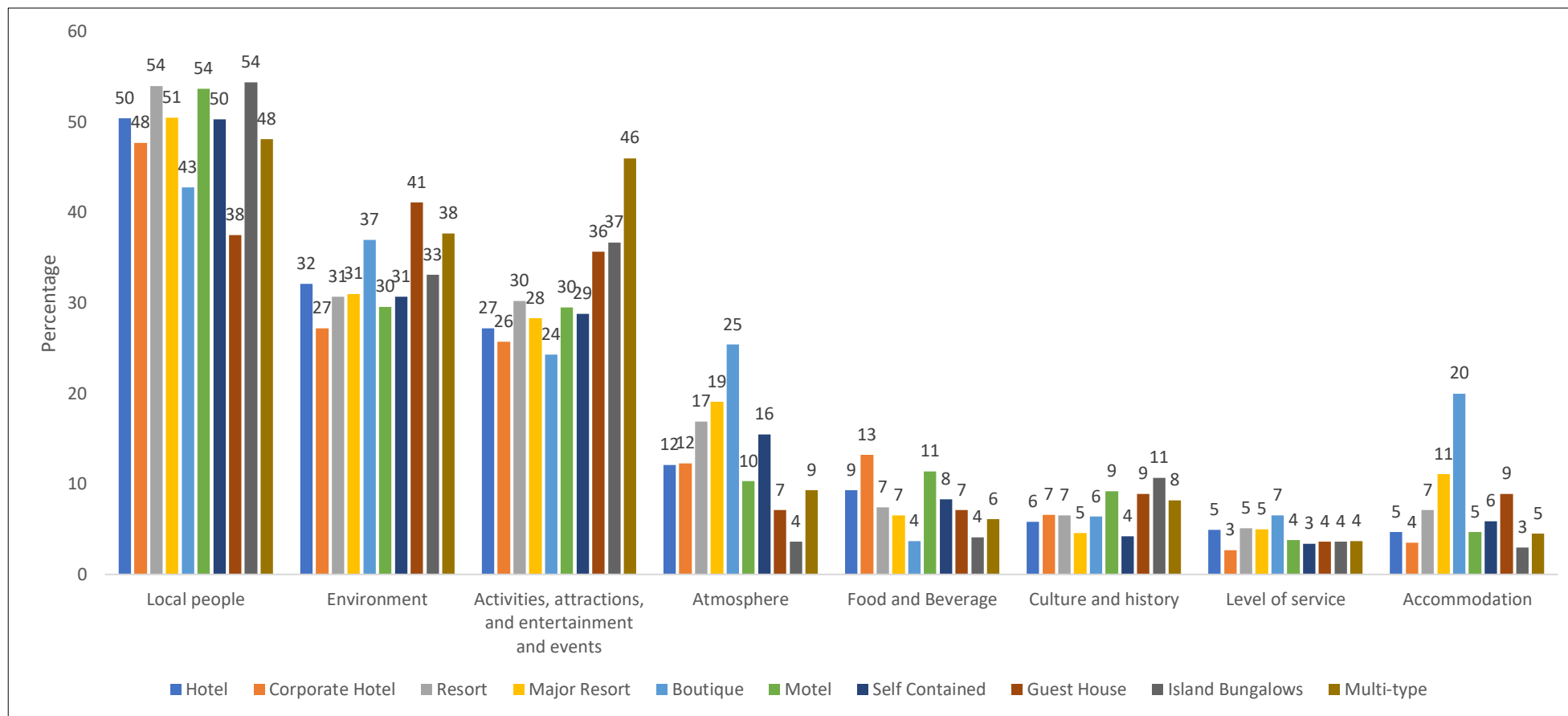
“I travelled with two other ladies and we all loved the culture and history of the island. It was so impressive how the Ni Vanuatu people have retained a lot of their cultural beliefs and ways. It was such an authentic Pacific island experience.” (Motel visitor)

Interestingly, the Guest House and Island Bungalow visitors varied somewhat in their focus on local people as being the most appealing aspect of Vanuatu. Culture and history attracted the Island Bungalow visitors more than any other group. In contrast, the Island Bungalow visitor were the least likely of all the different accommodation type visitors to focus on accommodation as an appealing aspect of their stay.

Across all the accommodation groups, visitors who stayed in Multi-type accommodation were by far the group that found activities, attractions and entertainment and events to be the most appealing aspect of Vanuatu.

“We want to return to Vanuatu and visit the outer islands. We could not get enough of the beautiful beaches, the swimming, snorkelling and zip lining. It was so much fun a perfect way to relax.” (Multi-type visitor)

**Figure 6.1 The most appealing aspects of Vanuatu**



Source: Adapted from International Visitor Survey data.



### *6.1.2 The least appealing aspects of Vanuatu*

A summary of the key themes to emerge from the “least appealing aspects of your visit” question is presented in Figure 6.2.

Boutique visitors found the public services and facilities the least appealing aspect and this was reiterated in their comments with an emphasis on general infrastructure. Resort guests were most likely to mention environmental quality especially in regard to roadside rubbish and recycling protocols.

“As we drove from the airport to our resort our hearts dropped at all the roadside rubbish spoiling the island, the need to upgrade the roads and infrastructure was also evident during our drive and did not create a good first impression of Vanuatu.”

These visitors also consistently referred to the price of goods and services and food and beverage as the least appealing aspects.

More than any other group, Guest House visitors were not satisfied with the general shopping experience in Vanuatu including the standard of service provided. Island Bungalow visitors tended to be most disenchanted with the price of goods and services and the attractions and activities on offer.

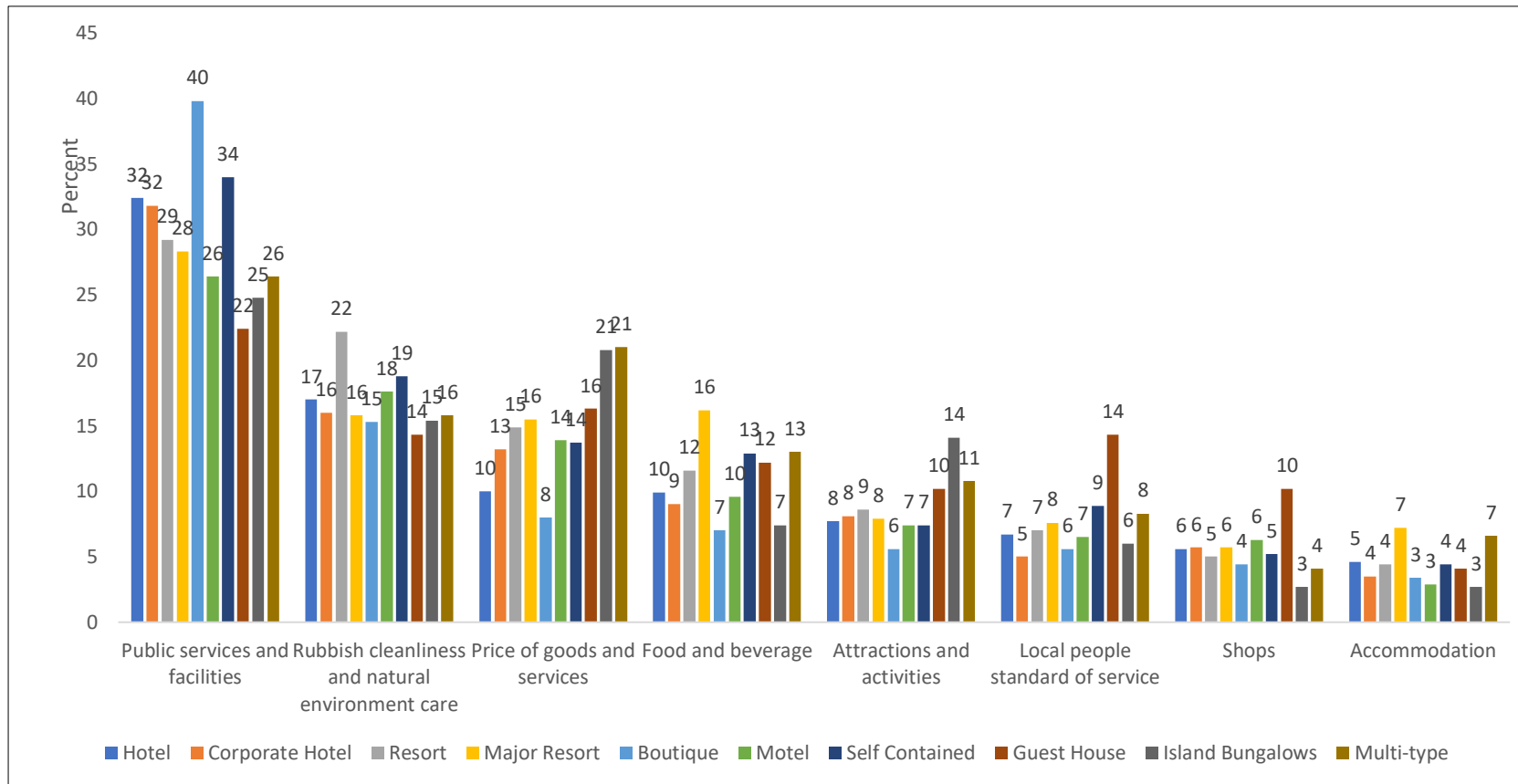
“I was looking forward to doing some shopping while on holiday but were disappointed with what we found. I wanted to buy some locally made goods to take back to my grandchildren but there was very little to buy.” (Guest house visitor)

The price of goods and services was considered to be a least appealing aspect of their visit by the Multi-type visitor and food and beverage was also highlighted as an area of concern.

### *6.1.3 Suggested improvements*

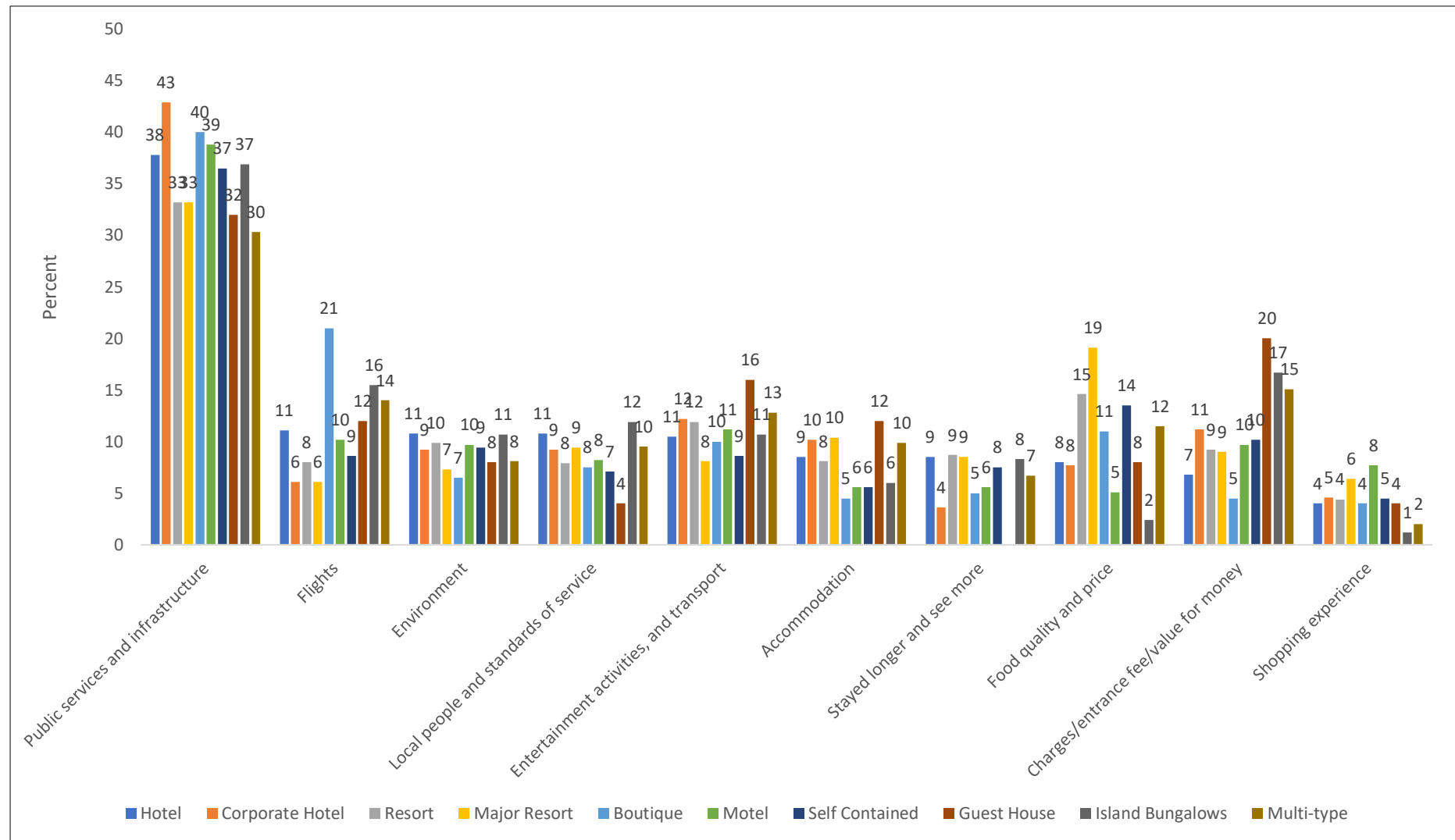
Valuable comments and suggestions were made by respondents on how to improve their experience of the destination. These constructive criticisms often included more care for the natural environment, improved rubbish collection and enhanced management of accommodation facilities. Public sector services, basic facilities and the main infrastructure were particularly singled out as being in need of improvement. Shopping areas and outlets also required improvements (Figure 6.3).

**Figure 6.2 The key themes emerging from survey respondents' responses on the least appealing aspects of their stay in Vanuatu**



*Source:* Adapted from International Visitor Survey data.

**Figure 6.3 Suggestions to improve visitor satisfaction by main theme across accommodation types**



Source: International Visitor Survey

Improvements to these areas would encourage an increase in length of stay, higher satisfaction levels, and therefore more word of mouth referrals to Vanuatu as a destination. They would also lead to a perception that Vanuatu provides value for money as a destination.

The Corporate Hotel guest emphasised the need for improvements in public services, local transportation and internet access. Boutique visitors by far were most likely to request regional and domestic flight schedule improvements. Food quality and price improvements were featured in the comments as a hot topic for the Resort guests.

“After seven nights we were tired of the food at our resort. They did not have any exciting buffet nights or themes and the food and beverages were so expensive.”

(Resort visitor)

Taking good care of the environment, improving overall standards of services and the welfare of the local workers were also listed as important items. The Guest House visitor tended to be the most likely to be unhappy with entrance fees and value for money and they tended to be looking for improvements in entertainment, activities and transport (Figure 6.3).

“We felt Vanuatu was not value for money and were disenchanted with the entertainment and activities on the island.” (Guest House visitor)

## *6.2 A Focus on Accommodation Dimensions*

This section of the chapter focuses on visitor feedback on specific matters relating to accommodation. The key themes addressed are accommodation, cost and value for money, and internet accessibility and communications. Accommodation is discussed in terms of how child friendly it is, and health and safety and cleanliness –rubbish and insect incursions were often highlighted by the guests. Maintenance of both fixtures and equipment provided at the accommodation is also a featured theme.

A sample of comments, set out by accommodation type and according to most appealing aspects, least appealing aspects and suggestions for improvements, illustrates how guests felt about their accommodation experiences in Vanuatu.

### *6.2.1 The Hotel group*

Guests staying in Hotel accommodation repeated certain positive comments. Their satisfaction with their hotel was a common theme.

“High standard of the hotel.”

“The hotel was lovely, the people and I loved the Hideaway Island.”

“The hotel was clean and very really comfortable bed.”

The visitors who stayed at Hotels had common dislikes, too. The following comments are typical of concerns raised around cleanliness, maintenance of the hotel and internet connectivity.

“I have yet to find a business hotel in a central location which has ... good internet connection.”

“There were ants in my hotel room.”

“The very dirty pool and broken tiles around the pool area at the hotel.”

“Snorkelling gear at the hotel needed replacing.”

“Fix the hotels in Port Vila; they are not safe.”

The guests who were staying in Hotels were relatively open in their suggestions for how their accommodation could be improved. They had some generic “wish list” suggestions, but also some very specific ideas that were practical. First, their comments on costs:

“More variety of food at lower costs.”

Public services and infrastructure were an area often focused on for improvements, and transport was an issue that particularly elicited suggestions:

“Improved road access to the hotel.”

“Better transport options; not having to rely on taxis.”

Staff friendliness was commented on repeatedly. It was clear that positive attitudes to “atmosphere” are intrinsically linked with the feeling of being welcomed. Specific locations and service providers were mentioned as needing training in how to deal with visitors.

“More hotel staff could have been friendlier and more accommodating.”

“Improve quality of service in the hospitality industry, mainly in hotels and restaurants. Need lots of training in customer service and confidence to talk to people.”

Suggestions for improvement were also closely tied to activities. The offering of a variety of attractions and activities was often seen by visitors as key to a good experience.

“Hotels to provide more tourism products allowing local artefacts, cultural dances in the evening and activities.”

“More in Vanuatu — crafts, culture and carvings, etc. on display, to give a more Melanesian flavour to Port Vila, and less of the trashy Chinese souvenir shops.”

One Corporate Hotel user’s comment summed up this group’s concerns:

“I have yet to find a business hotel in a central location which has both good internet connection, a restaurant good enough to host business guests, and a bath in the bathroom.”

Child-friendliness also featured, but only rarely:

“More facilities for small children at the hotel.”

Food was an important topic with the Hotel group and was often a key area of focus for business travellers who were entertaining clients.

“The food and menu’s could be improved at our hotel and incorporating more local cuisine would be good.”

#### *6.2.2 The Resort group*

This group includes visitors staying in Major Resorts, Resorts and Boutique Resorts. Overall, they were happy with the diversity of activities. They also enjoyed the fact that the resorts were “very organised”, the staff and locals “friendly”, and facilities “great” – all positives enhanced by “the naturalness” of the settings.

“[Beach] resort — the rooms were in spotless condition; the grounds were amazing.”

“The polished accommodation and food experiences while also being a little bit intrepid with the travelling around the islands. The experience is still ‘raw’ which is unique to some of the other locations around the Pacific and this should be celebrated.”

“Resort was so welcoming and accommodating to all our wants and needs.”

Internet access and communications did not feature as a topic of importance for Resort guests. In contrast, the issue of children being at the resort featured frequently, and the value of child-friendliness depended on whether the guest had children.

“Our [resort] was child free so very relaxing, so relaxing adults-only resorts.”

“[The resort had a] very safe beach for kids.”

“The baby-sitting service they offered [at the resort] was fantastic and great value.”

The Resort visitors often commented about atmosphere, frequently linking this with activities:

“The resort ... with kayaks and snorkelling gear, and it was all just not being in a resort, solitude and not hassled by tourist dollars.”

“The resort was like the photos stunning and very relaxing.”

“Services for children, however, needed no improvement.”

Hospitality featured strongly, with friendliness a key theme:

“The resort was beyond expectations and the staff were extremely friendly and helpful.”

“The friendly locals [made Vanuatu] a fantastic place to holiday.”

The least appealing dimensions commonly voiced by this group were roadside rubbish and general environmental cleanliness, and prices at resorts (especially compared with town prices).

“Found it expensive in the resorts, prices were on par with New Zealand.”

“Our meals at the resort were overpriced.”

“I thought food and drinks would have [been] cheaper in the resorts.”

“Prices in the resort compared to town.”

Cleanliness featured in conjunction with commentary on atmosphere and was not specific to the accommodation itself – the comments were tied up with hygiene, recycling and general housekeeping.

“Vanuatu and its resorts should have a recycling program for plastics and bottles.”

“Better housekeeping, better disposal.”

“The rubbish on the side of the road between the airport and [the resort].”

The Resort guests' comments on improvements often focused on quality, cost and variety of food.

"The food facilities at the resort were totally disappointing and I left a critique with management."

"The diversity of the food ... available."

"More resorts with organic food."

"[Bad] quality of food and drinks given the very high prices."

"Access to more local food."

Transport was also an area where Resort guests suggested improvements were needed. Maintenance and upgrades to transportation were the most common recommendations. Comments on transport to and from their accommodation were also common.

"Safe, reliable drivers [could not be found], no seatbelts in some buses."

"Better road maps to Port Vila— no street signs make it difficult to navigate when driving rental car."

"Port Vila isn't really suitable for tourists with kids — it's very dirty, no public transportation outside of taxis, not accessible with a pram and doesn't feel safe."

"Resort we stayed was a little too far from town and not all the buses/taxis were willing to make the trip."

Resort guests also suggested a number of improvements to the range of activities on offer through their accommodation. This highlights the important role of accommodation as an intermediary between the visitor and the surrounding economy. There was a feeling that a broader range of opportunities should be made available through the resorts:

"More local history."

"More quality souvenirs and artefacts."

"Would have liked more variety with souvenir shopping; found handcrafts hard to find."

"More day tour options for families."



### 6.2.3 *The Motel group*

This group also includes visitors staying in Self-contained units. Many of their “most appealing” comments focused on the theme of local people and culture. Visitors in this group stressed that staying in the Motel made it easier for them to interact with the local people and economy:

“The locals made our holiday in Vanuatu. We so enjoyed talking to them and learning about their culture.”

This group also tended to place an emphasis on local produce and goods, looking for opportunities to connect more to the local economy. The fact they were in self-catering situations encouraged this behaviour:

“I bought some great handicrafts while I was away and they look great in my house; a nice reminder of my lovely trip and all the wonderful Vanuatu people I met.”

“The local markets and produce – so much and such good quality - so fresh.”

Comments on the “least appealing” aspects of their stay tended to focus on the standard of facilities and the service they received.

“There is almost no quality budget accommodation.”

“Our accommodation rated 4-star, but closer to 2.5-star.”

The suggestions made for improvements by this group often focused on accommodation cost and value for money:

“Yes, the accommodation could be improved.”

“More package deals for house rentals.”

The maintenance and upkeep of facilities was also a concern, with safety issues being raised in some circumstances:

“Our accommodation has a serious problem with the concrete pathways within the property. So slippery when wet that several children and adults slipped over and at times hurt themselves.”

Upgrades to transport arrangements were also a common theme raised by this group. Interestingly, visitors staying in Motels tended to be focused more than many of the other

groups on the need for improved public transport, especially on the accommodation–airport route.

“A dedicated, regular, cheaper and reliable Port Vila-to-airport bus service.”

Improvements suggested in the area of food tended to focus on the availability and cost of imported food such as breakfast cereals. Visitors in the Motel group were sometimes concerned with how they would cater for their food needs during stay.

“Poor accommodation — breakfast was just cornflakes and toast.”

“Better shops for provisions around the island.”

#### *6.2.4 The Island Bungalow and Guest House group*

The general atmosphere of the outer islands and environment was a major appeal to Island Bungalow and Guest House visitors and this clearly shone through in their comments. The fact that people were staying in locally owned accommodation, often situated in community settings, was seen as a key feature that added to and opened the door to local experiences that would not otherwise been found. These visitors see the local accommodation experience as being closely linked to access to local food and the opportunity to interact with local people in informal and authentic ways.

“Tanna island, dream bungalows on Tanna island.”

“[Our Guest House] was the perfect accommodation for us and our friends that we travelled with — we prefer small accommodation for us rather than big resorts.”

Most of the “least appealing” comments focused on the lack of and/or need to improve budget accommodation facilities:

“Our accommodation was below expectations.”

“More facilities for backpackers.”

“Bungalow was incredibly dirty — rubbish at the front of the bungalow.”

There was also some comments on the need for more locally owned accommodation. These comments reflect the visitors’ concerns about the authenticity of their travel experience and their desire to generate benefits for the local people of Vanuatu.

“Also, a bit disturbed to see so much foreign ownership of land and the increase number of vehicles and foreign ownership everywhere.”

The Island Bungalow and Guest House visitor segment tended to provide pragmatic suggestions for improvements. Their suggestions often went beyond themselves to also reflect on the broader community/population. Comments on costs and value for money tended to relate to accommodation-related transport or activities rather than just the guest house or bungalow itself:

“Fairer wages and opportunities for locals.”

“For taxis were overpriced and also the volcano tour especially as there was no scientific interpretation given.”

“Affordable car hire.”

This group was also most likely to discuss challenges of domestic air transport in relation to accommodation experiences, with concerns expressed about delayed flights, for example, leading to lost bookings.

“Your national airline has an appalling domestic service. Cancelled flights occurring frequently, overbooked flights and when visiting multiple island.....this can completely jeopardise the whole trip.”

Internet access was a major issue for Island Bungalow and Guest Houses visitors, as was communications in general.

“Better internet!”

“Internet not available and no phones.”

While health and safety was not an area on which Island Bungalow and Guest House visitors commented, suggestions were made for improving maintenance in areas related to basic comforts such as working showers and better mattresses. A number of comments were also made about rubbish and improving general waste management:

“Better rubbish collection is needed.”

The hospitality and friendliness of the local Vanuatu people and the way they received visitors was positively commented upon. However, there were also frequent comments, and accompanying suggestions, that accommodation providers need to make it easier for visitors to find what they wanted at the destination and that the owners need to learn to make their businesses more visible.

“Better access to the tourist sites on Tanna would be a bonus for visitors and the local people.”

“Maybe possible to help owners of accommodation, especially in Tanna, to publish their rooms in Airbnb and Travel Advisor.”

“More information [like] recent photos online [would be beneficial].”

Food was mentioned by the Island Bungalow and Guest House visitors in direct relation to cost and self-catering, as it appeared guests at Island Bungalows cooked their own meals.

“And food, or at least food quality, worth the money being charged.”

“Not staying at the resort this time, much more relaxing, love the markets to buy and cook my own food.”

#### *6.2.4 The Multi-type group*

Visitors in the Multi-type group – i.e. those who used two or more different types of accommodation – tended to be a little less likely to write comments on their accommodation experiences. Nevertheless, a number of interesting themes did emerge. One thing worth noting is that it is in this group that we saw most mention of Airbnb – clearly this form of the sharing economy is seen as a useful accommodation option as part of a longer stay. Given that the data is drawn from 2015–2017, it would be interesting to see how Airbnb features in current accommodation choice segments.

Many of the visitors in this group mentioned the diversity of accommodation available across the country as one of the most appealing aspects of their stay in Vanuatu. For some it was good to be able to escape a resort or hotel for a change in accommodation, while also broadening their holiday experience:

“The diversity of the accommodation available.”

“Our Airbnb accommodation in second half of stay was amazing.”

“Staying in a private holiday residence, thus avoiding the resorts full of other Australian visitors.”

For visitors in the Multi-type group, the least appealing aspects of their stay tended to focus mostly on the products and experiences that were linked to their accommodation and often organised through the place the visitor was staying. Again, as mentioned by visitors in the other accommodation groups, the issue of roads and transport to and from their accommodation was raised, especially in the outer islands. There was a feeling that

accommodation owners in the outer islands could do more to assist the visitor in providing information on local facilities and particularly the costs of accessing certain sites.

“The poor quality of the roads and the public services such as the public toilets.”

“The cost of the tour and entrance fee to Mount Yasur.”

Suggestions for improvements tended to reflect the themes mentioned by visitors in the other accommodation groups, and often related to waste management and the quality of some accommodation facilities. It was interesting to note, however, that visitors in the Multi-type group tended to be less likely than those in the other accommodation groups to suggest improvements. The diversity of experiences and range of accommodation offerings they used seemed to give people a deeper experience and a greater sense of the true nature of Vanuatu regardless of small areas that might need fine tuning.

“I loved staying in north Efate in an Airbnb beach bungalow. It was quiet and beautiful. The snorkelling in Hideaway Island was great, and the fire show at the Resort was the best I have ever seen. Also, the Blue Lagoon was amazing.”

“Friendliness. Unplanned visit to local village beside was excellent. So too were the Summit Gardens, especially as they had free entry when we were there. We also stayed at a couple of Airbnb properties, which were good.”

“This time, our main reason for visiting was to see Mt Yasur on Tanna, which did not disappoint but we thoroughly enjoyed ourselves doing lots of other activities as well – Snorkelling at Hideaway Island (3 times), Mele Cascades, Coongoola Cruise, Jungle Ziplining, Blue Cave and the Black sand beach on Tanna. Perfect destination to take teenage children – lots to do in a wonderful environment. We visited a number of schools while on Tanna and provided some donations and that was my children’s favourite memory of the trip”

## **Chapter 7: Summary and Conclusions**

The aim of Chapter 7 is to review the study's key findings, with a focus on generating profiles of visitor types, based on accommodation choice. A discussion of those profiles is followed by recommendations and a review of the contributions made by the thesis and thoughts on future research possibilities.

### **7.1 Vanuatu Visitor Profiles by Accommodation Choice**

A visitor profile for each of the five accommodation groups, as described in Chapter 6, has been created to help to understand and portray visitor characteristics in terms of accommodation choice. By understanding the different characteristics of these visitor profiles, accommodation providers may better understand what products and services to offer their guests. Profiling visitors also provides valuable information to the Vanuatu Government, communities and the broader tourism industry as they look to plan and develop tourism in the future.

#### *7.1.1 The Hotel visitor*

This group includes both the Regular and the Corporate Hotel visitor and makes up 13% of the total IVS sample of visitors from 2015–2017. Australians make up 40% of this market, 23% are long-haul visitors and 18% are from New Zealand and 19% are New Caledonia and other Pacific Islands. The Hotel accommodation category attracts the older market segment, with 60% of visitors aged between 50 and 59 years, and the purpose of their travel is predominantly for business. Hotel visitors also have the highest percentage of repeat visits.

The majority (84%) of this group stayed in Efate. The Hotel visitor had average length of stay in Vanuatu of seven nights. Their total daily spend averaged out at US\$237, which was second only to the Boutique visitor's daily spend of US\$291. Certainly, this spend reflects a corporate budget in terms of food and beverages, with a 30% (Hotel) and 28% (Corporate Hotel) allocation for food and beverage spend in Vanuatu per person per day of expenditure.

There are some subtle differences within this group, in that the Corporate Hotel visitor's travel arrangements are more often made by others (their company/business, friends, relatives) than the regular Hotel guest's arrangements. In addition, a high percentage of Corporate Hotel visitors have travelled to Vanuatu for business or conference purposes

before. Hotel visitors stayed the most nights in Espiritu Santo, despite a very small number visiting this island.

The Hotel visitor was generally satisfied with the level of service provided at their accommodation, the quality, availability and maintenance of facilities provided and the overall value for money. The Hotel visitor enjoyed their interactions with the local population (with the exception of airport officials) and their experiences of the unique culture of the Vanuatu people and the environment. However, the Hotel visitor, particularly the corporate client, was vocal about the lack of internet service. Nonetheless, the internet was important to all visitors, and their frustrations were evident.

“The price of internet [data] costs for mobile. It makes it too expensive for people to share, tweet or post on their wonderful experiences in Vanuatu because of the high cost of data”

The Hotel visitor was also very discerning in terms of their comments about maintenance and facilities within the accommodation and the need to upgrade the quality of what was provided. It appears that improvements in this area of accommodation quality would have a significant impact on improving guest satisfaction.

#### *7.1.2 The Resort visitor*

Data analysis revealed that the Boutique visitor's closest parallels were found among Resort visitors, therefore Boutique Resort visitors have been placed within the larger Resort group for the purposes of this profiling. It is important to note, though, that Boutique visitors have some unique qualities, and there were also some differences between the Major Resort and other Resort visitors in these respects.

The Resort visitors were the largest group of visitors surveyed, constituting 54% of all IVS respondents. The Resort visitor mainly came from Australian and preferred to stay in Boutique or Major Resort accommodation, while the New Zealand visitor preferred smaller non-Boutique Resorts. The Resort visitor stayed, on average, seven nights, and is often part of a professional couple or small family in the highest income bracket. The Boutique visitor had the highest income bracket at US\$120,000. The Major Resort and Resort visitor was inclined to purchase a pre-paid package, while the Boutique visitor was more likely to plan their own travel arrangements through travel websites.

The key drawcards for Vanuatu as a destination for the Resort visitor were the local people, local culture and the tropical environment of the islands. Child-friendly facilities and babysitting services were considered an asset. Vanuatu nannies were key to this visitor, who often had young children but was keen to relax and have some child-free time during their visit. The resorts that were child-free also gained positive feedback, catering for perhaps an older market of couples without children and younger professional couples. As the following quote shows, the Resort visitor is also not averse to engaging in broader cultural and natural experiences.

“This was my third visit to Vanuatu – it’s my favourite island destination. It is stunningly beautiful, the people are delightful and there are lots of really interesting things to see and do. The most appealing/attractive aspect is the people. They are friendly and pleasant and I love the way that you are able to see how they live their lives – it’s not like other places where the tourist ‘bubble’ insulates you from the local people and you are in this sealed off ‘resort’ experience.”

The Boutique Resort visitor had the highest expenditure, at US\$2,162.00 per trip and US\$291.00 per person per day. By comparison, the Major Resort visitor averaged US\$1,456.00 per trip and US\$206.00 per person per day, and the Resort visitor US\$1,406.00 per trip and US\$184.00 per person per day. The Resort visitor tends to be more cost conscious than the Boutique visitor while on holiday, and this was reflected in a number of comments about the prices at the resorts, particularly the cost of food and beverages. The Boutique visitor is, nevertheless, still focused on the broader theme of value for money.

The Resort visitor rated their holiday a 4 in terms of value for money, and the level of service at accommodation facilities a 4.3. The Resort visitor felt that accommodation services could be improved by providing better training for staff in areas such as customer service. They were eager to see improved public services, upgrades to airport facilities and more user-friendly flight schedules, a more developed infrastructure, and improved accommodation services. The amount of rubbish and the lack of waste management were frequently cited as detracting from visitor satisfaction.

The Boutique visitor provided the best average score of 4.5 for level of service, quality and availability of activities, and facility maintenance, as well as the overall value for money they saw in their Vanuatu experience. They repeated the theme of improved visitor satisfaction,



emphasising that public services and infrastructure needed to be further developed. The airport's structure, organisation, service delivery and flight schedules were of considerable concern, and were clearly seen as being fundamental to improving visitor satisfaction.

### *7.1.3 The Motel visitor*

A relatively small percentage (11%) of the total visitor numbers surveyed in the IVS chose to stay in Motels, including self-contained accommodation. Just 18% were first-time visitors to Vanuatu, and 80% stayed in Efate. The majority of the Motel visitors were from Australia, with 30% in Motels and 23% in Self-contained accommodation from the long-haul market. New Zealanders tended to choose Self-contained accommodation rather than Motels. The average length of stay in Motels and Self-contained units was 8.9 days. The Motel visitor clearly chooses to stay in a more budget-type accommodation with the ability to self-cater. The Self-contained visitor had a higher spend at the local supermarkets and cooked local produce in their accommodation. The Motel visitor travels, on average, with three or four companions and has an annual average household income of US\$69,926.00. Their average daily spend was US\$168, which was the second lowest per-person daily spend for visitors from all the accommodation groups.

Motel accommodation also attracts volunteer tourists and conference guests, and a younger demographic aged 18–29 years.

“The opportunity to volunteer as a student midwife in a hospital that provided us with the chance to fully immerse ourselves in the culture and everyday life of women and families in Vanuatu. The people and their level of hospitality and openness was inspiring.”

Self-contained accommodation is also attractive to people travelling as part of wedding parties.

The most appealing experiences of their visit noted by those in the Motel group were Vanuatu's friendly host population and the country's naturally beautiful environment. The least appealing aspects were the public services, facilities and rubbish. The Motel visitor is more likely to express dissatisfaction with the standard of and facilities at their accommodation than the visitor staying in Self-contained accommodation.

#### *7.1.4 The Island Bungalow and Guest House visitor*

Only 3% of the IVS respondents stayed in a Guest House or Island Bungalow, suggesting a lack of exposure of these types of accommodation in terms of promotion and awareness. This visitor was more likely to find out about Vanuatu through word of mouth and to use social media to plan their trip. A quarter (24%) were first-time visitors to Vanuatu, often coming for education purposes. The Guest House visitor tended to have a younger age profile but the 50+ age bracket was also important. Forty-two per cent of those who stayed in Guest Houses were long-haul visitors, with a further 28% of Guest House visitors coming from Australia.

The Guest House and Island Bungalow visitor stayed longer than the visitors in the other accommodation groups (with the exception of the Multi-type visitor), averaging 9.8 days. This is because the Guest House and Island Bungalow visitor was more likely to visit the outer islands, mostly Tanna and Espiritu Santo. This visitor also had the highest number of travel companions, with four people on average in their travelling groups. In contrast, the Guest House and Island Bungalow visitor has the lowest average household income of US\$64,226. The Guest House visitor has an average daily spend of US\$187.00 and the Island Bungalow visitor, US\$140.00 – the lowest spend of all five accommodation groups. The Guest House and Island Bungalow visitor was also more likely to be visiting friends and family in Vanuatu, which could explain their lower daily spend.

The Guest House and Island Bungalow visitor was more concerned about sustaining the environment and the need for more improved infrastructure, especially in the outer islands. In this accommodation group, the highest percentage of visitors stressed environmental factors when listing key factors influencing travel to Vanuatu. The Guest Houses and Island Bungalow visitor wanted to see volcanos, experience eco-tourism and engage in nature photography. When asked about the most appealing aspect of their visit, this visitor stressed mixing with local people. Their key concerns related to public services and facilities, the price of goods and services, and rubbish and littering. Services like telecommunications or the internet did not generally rate as being so important and were clearly not expected or anticipated in many settings. The Guest House and Island Bungalow visitor is an intrepid adventurer, or “allocentric traveller” (Plog 1973), who wants to understand the local community at a deeper level.

### *7.1.5 The Multi-type visitor*

More than one in five (22 %) of all the IVS respondents stayed in multiple types of accommodation. Only 11% of this group were first-time visitors to Vanuatu. The Multi-type visitor tended to spend a few days in Efate and then often travelled to the outer islands for a different experience. In most cases, they stayed at local facilities and budget-type accommodation in the outer islands. Their average length of stay was long, at 10.3 nights. The Multi-type visitor travelled to the outer islands, including Santo (21%) and Tanna (26%). This visitor typically came from a high-income group, (average US\$84,632), and their daily spend (US\$188) was the third highest of the five accommodation groups.

The Multi-type visitor enjoyed interacting with the friendly host population, cultural experiences, marine recreational activities, volcanoes on the outer islands, and the natural environment. The least appealing aspects of their stay was the perceived high prices of goods and services.

The Multi-type visitor researched and planned their trip to Vanuatu through travel websites and appreciated the mix of attractions and activities on offer as well as a variety of accommodation choices. This type of visitor wanted to experience Vanuatu's diversity and have a variety of opportunities to gain a deeper exposure to what the destination has to offer.

## *7.2 Thesis Contributions and Recommendations*

Gaining a deeper understanding of visitor characteristics associated with accommodation choice opens up a range of important contributions and benefits for Pacific tourism research and also the development of tourism in the region.

This work has provided a new approach to using data collected through the Vanuatu International Visitor Survey. The study has identified visitor types through the lens of accommodation types rather than using the conventional method of identifying visitor types based on source market. Accommodation choices not only give an insight into visitor expectations and their perceived experiences at the destinations, but also allow a new way to think about visitor type.

The thesis has also highlighted the importance of factoring into models of tourism development in the region an understanding the role of accommodation investment and development. Models such as MIRAB and Britton's dependency perspective can be further critiqued and enhanced by providing a deeper data-driven understanding of the nature of the

visitors using different elements of the accommodation sector. The research shows the value of encouraging and supporting a mix of accommodation offerings, of not becoming overly dependent on large scale and often foreign-owned accommodation. The research shows that a mixed approach to accommodation investment and development is most likely to generate longer length of stay, greater economic impacts per visit and greater dispersal of visitors through the outer islands. Such an approach also encourages greater local involvement in the accommodation sector, both as owners of accommodation but also as beneficiaries of a more tourism-linked local economy.

The work also highlights the importance of making greater use of IVS data to develop a deeper understanding of the impact of tourism. IVS data in the PICs has been traditionally used to provide basic information on visitor numbers and spend levels. This work has shown that there are opportunities to delve deeper into the data and adopt new approaches to understanding tourism impacts. It has shown the value of not just exploring the quantitative dimensions of the data but also the rich information that can be found in longer comments and responses to questions about the least and most appealing aspects of the tourist's visit as well as suggested improvements to facilities. This is the first time that IVS data in Vanuatu has been reviewed in this way to gain deeper insight into accommodation-related visitor characteristics. The thesis highlights the importance of exploring the long-answer elements of IVS and not just focusing on the more easily quantifiable dimensions of the survey.

This thesis provides important practical information to those who plan, develop and operate the tourism industry in Vanuatu and other PICs. It presents insights that can help to shape future investment policies and highlights the value of supporting and encouraging local investment in areas like Guest Houses and Island Bungalows. The research shows the importance of these types of facilities for outer islands and the value of realising that visitors may well be adopting Multi-type accommodation approaches to their holidays. It is critical that government tourism strategies continue to focus on the need for a mix of accommodation types and that local control and ownership is not forgotten in the important race to also secure foreign direct investment in larger accommodation projects.

The work has also highlighted where different accommodation sectors need to make improvements to their own (and related) product and experience offerings. The needs and expectations of the visitor varied across the groups; for example, there was greater demand

from the Hotel visitors for internet access and communications than from those staying in outer Island Bungalows where there is no expectation of high-quality ICT access.

For those who market the industry, the work has provided insights into how people using different forms of accommodation book their travel, the types of experiences they undertake and the likelihood that they will return and/or recommend the destination to others. There is a need to upgrade facilities, especially in the lower-budget sector. The four least satisfied visitors were those in Motels, Guest Houses, Island Bungalows and Major Resorts. Gaps were identified in the standard of budget accommodation and facilities available. Also, it is important to focus on continuing to improve education and related service levels in accommodation and to pay greater attention to waste management.

For communities and destinations, the research provides a clear sense of the types of visitors that may well be associated with different forms of development that occur within their midst. The research highlights the important role that small-scale locally focused accommodation continues to play in Vanuatu, especially in outer island areas.

The researcher initially used the Vanuatu Tourism Organisation's accommodation of categories for the IVS analysis (Chapters 5 and 6). However, after completing the data mining and analysis, it became clear that these categories were not ideal. The classification system could be improved by using information collected from the IVS to more accurately combine different accommodation types and perhaps create a small number of "clustered" categories (as presented earlier in this chapter). Adopting a narrower range of classifications would allow greater opportunities for analysis over shorter time periods (e.g. 6 months), alleviating the need to combine data sets of several years.

### **7.3 Future Research and Final Thoughts**

This research has laid a platform for future research in Vanuatu and elsewhere in the PICs. It will be important to continue to use the IVS data collected in Vanuatu and elsewhere to generate a deeper understanding of the visitor characteristics associated with accommodation types. This work could also be enhanced by adopting other research methods to gain deeper insights from visitors. For example, focus groups and semi-structured interviews across accommodation groups could be used to gain deeper insight into particular specific issues such as perceptions of and access to local food.

Deeper analysis could also be used to further explore the role that accommodation choice plays in shaping destination visitation and development outcomes. For example, the unique features of the highly popular Vanuatu Boutique Resort and Island Bungalow accommodation types are of interest. These two types of accommodation could be further developed as unique selling points of the destination, especially as they could be linked to the environment and sustainability aspects of the 2030 Vanuatu Tourism Plan. Typical Boutique accommodation in Vanuatu has different design features and amenities to those found in the larger resorts. Future studies could explore guests' desires and other factors that attract them to Boutique properties. Using this information, operators would then be able to develop strategies to optimise resources more efficiently and maximise their guests' purchasing opportunities and satisfaction. Likewise, deeper insights into Island Bungalow, Airbnb and Guest House visitors could aid in the development of outer island products and experiences and also facilitate greater linkages to the local economy.

Some of the comments in the survey mentioned Airbnb, which was not one of the categories included in the IVS in 2015–17 (but is now). Airbnb is a disruptive variable for the accommodation sector, and one that continues to grow in popularity. Since the most appealing aspect across all accommodation groups was meeting local people, there would be some good opportunities for the local Vanuatu people to capitalise on the Airbnb concept, which is not dissimilar to a Guest House. Therefore, more research could be developed in the future to look at the possible disruptive impacts (both positive and negative) associated with the emergence of this form of the sharing economy.

More research into the Multi-type accommodation category would also be valuable, particularly given that these visitors tend to stay longer, exhibit high spending per person per trip, and have wide interests in the environment and local culture. Vanuatu tourism is currently heavily dependent on the Australia and New Zealand markets. More research into visitors from long-haul markets and their accommodation preferences could yield information that might help to diversify the tourist market. Long-haul visitors would be an ideal target market because they tend to stay longer, spend more and express higher levels of satisfaction than the general visitor.

There is also scope for further research into identifying relevant skills needed in the accommodation sector. Comments on service quality were not a focus for all the accommodation-related visitor groups but clearly there are opportunities to raise standards

across the board, especially for outer-island destinations. As new initiatives in training are developed, it will be important to continue to analyse and track visitor feedback through the IVS.

In conclusion, this research represents the first attempt to look in some detail at the visitor characteristics associated with different forms of accommodation in Vanuatu. The research provides a base of information that will be useful in planning and developing the tourism industry in the country. The work also provides a benchmark against which future research can be compared. Most importantly, this thesis has shown the vital importance of data in planning and developing tourism in the region and has highlighted the value in exploring both qualitative and quantitative dimensions of IVS data.

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## Appendices

### *Appendix 1: Tourism Product Classification Categories 2018 – Vanuatu*

BUSINESS TYPE (Licence Category)	DESCRIPTION (Key Characteristics)
1. Hotel	<p>Accommodation establishment that services both business and leisure travellers, with a mix of facilities to suit both. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Dedicated staff and reception area</li> <li>• Room service available</li> <li>• Daily housekeeping services</li> <li>• Availability of a safe storage area</li> <li>• Restaurant, food and beverage facilities, including service of alcohol</li> <li>• Parking</li> <li>• Tourist information desk</li> <li>• Toilet facilities available around common public areas</li> <li>• Tea and coffee making facilities in room, mini bar</li> <li>• Business services (e.g. computer, phone, internet, fax, printing)</li> <li>• Conference facilities</li> </ul>
2. Resort	<p>Accommodation establishment with the same key characteristics as a hotel plus recreational activities. Resorts with conference facilities may service a significant level of business travellers, but primary client base is leisure travellers. Typical services and facilities may include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Dedicated and staffed reception area</li> <li>• Room service available</li> <li>• Daily housekeeping services</li> <li>• Availability of a safe storage area</li> <li>• Restaurant, food and beverage facilities, including service of alcohol</li> <li>• Parking</li> </ul>

BUSINESS TYPE (Licence Category)	DESCRIPTION (Key Characteristics)
	<ul style="list-style-type: none"> <li>• Tourist information desk</li> <li>• Toilet facilities available around common public areas</li> <li>• Tea and coffee making facilities in room, mini-bar</li> </ul> <p>Plus</p> <ul style="list-style-type: none"> <li>• Swimming pool and/or beach access</li> <li>• Kids Club or child-minding services</li> <li>• Rental or provision of leisure equipment</li> <li>• Tour booking services</li> <li>• In-house activities/games/events for guests</li> <li>• Themed events such as ‘Cultural Night’</li> </ul>
3. Motel	<p>Accommodation establishment that services both business and leisure travellers with rooms or apartment-style units that are self-contained but within a larger building or complex of buildings. Property is comfortable but does not provide extensive leisure areas or facilities for guests. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• On-site manager</li> <li>• Reception area and visitor services</li> <li>• Regular and/or on-request housekeeping services</li> <li>• Availability of a safe storage area</li> <li>• Parking</li> <li>• Tea and coffee making facilities in room</li> </ul>
4. Self-Contained Stay	<p>A publicly advertised and available accommodation such as a Villa, Apartment, Lodge, Cottage, House, Studio, Annex or Room that allows private or partial/shared use of accommodation for no more than three (3) months. May be a defined space (e.g. a room) in a private residence, a single self-contained unit (e.g. a studio on private property) or a commercially operated unit or complex of units that can be booked separately or in combination. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Advertised and/or booked online and/or through an agency that collects a fee</li> </ul>

BUSINESS TYPE (Licence Category)	DESCRIPTION (Key Characteristics)
	<ul style="list-style-type: none"> <li>• Property owner/manager provides a ‘light-touch’ service rather than a full guest service or family-style experience</li> <li>• Check-in/welcome service but guests are mostly independent during stay</li> <li>• Regular and/or on-request housekeeping services</li> </ul>
5. Guest House	<p>Accommodation establishment such as Guest House, Hostel or Backpackers. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Common room/hall</li> <li>• Private bedrooms and/or shared dormitory rooms (e.g. with bunk beds)</li> <li>• Kitchen with all facilities for cooking and dining</li> <li>• Guests must be able to cook for themselves</li> <li>• Shared bathroom and toilet</li> <li>• On site Manager (or responsible staff)</li> <li>• Permitted to sell a small-scale selection of community-produced products within premises</li> </ul>
6. Island Bungalows	<p>Accommodation establishment with one or more self-contained units built in traditional style (often with natangora roof). Also includes ‘treehouse’ or other traditional-style units. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Architectural design reflects local Vanuatu island historical building structure</li> <li>• May have shared bathroom and toilet facilities</li> <li>• Village setting with basic facilities</li> <li>• Encourages engagement and activities with local community</li> <li>• Permitted to sell a small-scale selection of community-produced products within premises</li> </ul>

BUSINESS TYPE (Licence Category)	DESCRIPTION (Key Characteristics)
7. Home Stay/ Airbnb	<p>Accommodation establishment that allows for a visitor to rent a room in a home setting. The primary purpose of the stay is to learn about ni-Vanuatu culture and lifestyle (rural or urban) and/or improve local language skills. Family are in residence and have high level of interaction with guests. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Private sleeping area is provided but all other facilities (e.g. bathroom) are usually shared with family</li> <li>• Breakfast provided with other meals available by arrangement</li> <li>• Permitted to sell a small selection of community-produced products within premises</li> </ul>
8. Camp Site	<p>An establishment where visitors set up temporary tents and/or book temporary dwellings. Typical services and facilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• Designated tent sites available for hire</li> <li>• Tents or simple accommodation available for hire</li> <li>• Communal cooking facilities</li> <li>• Communal toilet and private facilities to allow for changing and showering</li> <li>• Barbeque facilities</li> <li>• Basic supplies for sale or simple restaurant on site.</li> </ul>

## *Appendix 2: Vanuatu Visitor Survey – December 2016–May 2017*

### Q1.1 ABOUT YOUR VISIT:

This survey is about your most recently completed visit to Vanuatu. We would ask you to complete this survey within the next few weeks if possible.

If you are a permanent Vanuatu resident, thank you for your interest but this survey is focused on non-resident visitors to Vanuatu)

By completing the survey, you are giving consent to participate in this research.

Q1.2 1. When did you arrive in Vanuatu on your most recent visit? (format dd/mm/yyyy e.g. 27/03/2016)

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Q1.3 2. How many nights did you spend in Vanuatu on your most recent visit?

▼ 0 nights (0) ... 31 nights or longer (31)

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Q1.4 3. What was the main purpose of your visit?

- ☐ Holiday (1)
- ☐ Wedding party (2)
- ☐ Business (3)
- ☐ Conference (14)
- ☐ Visiting friends or relatives (4)
- ☐ Honeymoon (5)

☐ Volunteering (9)

☐ Education (8)

Q1.5 4. How did you get to Vanuatu? (tick as many as apply)

9. Virgin Australia (4)

10. Air New Zealand (5)

11. Air Vanuatu (6)

12. Qantas (7)

13. Aircalin (Air Calédonie International) (1)

14. Solomon Airlines (12)

15. Fiji Airways (8)

16. Air Niugini (16)

17. Private boat (10)

18. Other (please specify) (11)

---

Q5 5. How many people were accompanying you on this trip? (*Other people traveling with you not including yourself*). Please select the number below corresponding to their age group and gender.

	Male	Female
Under 15 (1)	▼ 1 (1) ... 16 or more (16)	▼ 1 (1) ... 16 or more (16)
15-24 (2)	▼ 1 (1) ... 16 or more (16)	▼ 1 (1) ... 16 or more (16)
25-44 (3)	▼ 1 (1) ... 16 or more (16)	▼ 1 (1) ... 16 or more (16)
45-64 (4)	▼ 1 (1) ... 16 or more (16)	▼ 1 (1) ... 16 or more (16)
65+ (5)	▼ 1 (1) ... 16 or more (16)	▼ 1 (1) ... 16 or more (16)

Q6.1

6.1 Which islands did you visit on this trip?

19. Efate (Port Vila) (6)



20. Espiritu Santo (1)
21. Tanna (2)
22. Malekula (10)
23. Ambrym (11)
24. Pentecost (12)
25. Erromango (13)
26. Other (please specify) (4) \_\_\_\_\_



Q6.2 6.2 How many nights did you spend on each island?

	Number of nights
Efate (Port Vila) (1)	▼ 1 (1) ... 30+ (30)
Espiritu Santo (2)	▼ 1 (1) ... 30+ (30)
Tanna (3)	▼ 1 (1) ... 30+ (30)
Malekula (7)	▼ 1 (1) ... 30+ (30)
Ambrym (8)	▼ 1 (1) ... 30+ (30)
Pentecost (9)	▼ 1 (1) ... 30+ (30)
Erromango (10)	▼ 1 (1) ... 30+ (30)
Other (6)	▼ 1 (1) ... 30+ (30)

Q7 7. How did you find out about Vanuatu as a destination? (*Choose the most important option and rank 1,2 and 3 using the dropdown below with 1 being the most important source*)

Rank 1. (1)	▼ Previous visits (1) ... General travel websites (e.g. TripAdvisor) (8)
Rank 2. (2)	▼ Previous visits (1) ... General travel websites (e.g. TripAdvisor) (8)
Rank 3. (3)	▼ Previous visits (1) ... General travel websites (e.g. TripAdvisor) (8)

Q8 8. What were the main sources of information you used for planning your trip to Vanuatu?

- 27. Previous Vanuatu visits (1)
- 28. Friends/family (2)
- 29. Travel agent/travel brochures (3)
- 30. Social media (Facebook, Twitter etc) (4)
- 31. Television or radio programmes (5)
- 32. Magazine and newspaper articles (6)
- 33. General travel websites (e.g. TripAdvisor) (8)
- 34. Vanuatu Tourism website (Vanuatu.travel) (7)
- 35. Other sources (please specify) (9)

Q9 9. Have you previously visited Vanuatu on a cruise ship?

- ☐ Yes (1)
- ☐ No (2)

*Skip To: Q51 If 9. Have you previously visited Vanuatu on a cruise ship? = No*

Q9.2 9.1 How many times have you visited Vanuatu by cruise ship?

▼ 1 (1) ... 5+ (5)

Q9.3 9.2 What year was your most recent visit to Vanuatu by cruise (yyyy)?

\_\_\_\_\_

Q9.4 9.3 How influential was your previous cruise experience in leading you to travel to Vanuatu again for this most recent visit?

- ☐ No influence (1) (1)
- ☐ Little influence (2) (2)
- ☐ Some influence (3) (3)
- ☐ Very influential (4) (4)
- ☐ Prime reason (5) (5)

Q51 10.1 How did you purchase your travel to Vanuatu?

- ☐ I purchased a pre-paid travel package through a travel agent (1)
- ☐ I made my own travel arrangement (through online website or booked with hotels/airlines) (4)
- ☐ Travel arrangements were made by others (business, friends, relatives) (5)
- ☐ Other (please specify) (3) \_\_\_\_\_

36.

37.

38. Q10.1 10.2 Thinking about why you chose to visit Vanuatu on your most recent visit, how influential were the following factors in leading you to make your decision?

	No Influence (1) (1)	Little Influence (2) (2)	Some Influence (3) (3)	Very Influential (4) (4)	Prime Reason for Visit (5) (5)
Beaches and swimming (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snorkelling and diving (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Culture and history (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nature attractions / volcano / eco tourism / photography (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friends and family in Vanuatu (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quiet and relaxing atmosphere (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessible (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordable (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fishing (9)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business or conference (10)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food (11)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10.3 10.3 Please select the Efate/Port Vila accommodation(s) you stayed in during your most recent visit.

(You may select multiple accommodations - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one accommodation).

- 39. Ah Tong Motel (203)
- 40. Airlines Business Hotel (204)
- 41. Anabru Pacific Lodge (205)
- 42. Angelfish Cove Villas (285)
- 43. Aquana Beach Resort (206)
- 44. Beachcomber Lodge (207)
- 45. Benjor Beach Club (208)
- 46. Blue Lagoon Bungalows (286)
- 47. Blue Marlin Lodge (287)
- 48. Blue Pango Motel (209)
- 49. Bluewater island Resort (210)
- 50. Breadfruit Apartments (211)
- 51. Breakas Beach Resort (212)
- 52. Business Class Hotel (288)
- 53. Central Inn (289)
- 54. Chantilly's on the Bay (213)
- 55. City Lodge (214)
- 56. City Motel (290)

57. Coco Beach Resort (215)
58. Cocomo Resort (291)
59. Coconut Palms Resort (216)
60. Coral Motel & Apartments (217)
61. Emmanimalo Motel (293)
62. Epi Island Guesthouse (318)
63. Erakor Island Resort & Spa (218)
64. Eratap beach Resort (219)
65. Farkasei Mele Village Lodge (294)
66. Fatumaru Lodge (220)
67. Freshwota Lodge (295)
68. Gimini House (296)
69. Golden Port Hotel (221)
70. Golden Dragon Motel (297)
71. Grand Hotel and Casino (222)
72. Harbour Views (223)
73. Hideaway Island Resort (224)
74. Holiday Inn Resort Vanuatu (225)
75. Hotel Olympic (226)
76. Iririki Island Resort (227)
77. Island Breeze Bungalow (319)
78. Island Magic Resort (228)
79. Island Motel (298)
80. J.J Bungalow (320)
81. Jalom Guest House (321)
82. Jowi Bungalow (322)
83. Kakula Private Island (323)
84. Kava Motel (299)
85. Kaiviti Motel (229)
86. Koyu Apartments (300)
87. La Maison du Banian (230)
88. La Mer Resort (301)
89. Lagoon Beach Resort Apartments (231)
90. Laguna Vista (232)

91. Lapita Lodge (302)
92. Les Alizes (233)
93. Les Cottages de Bellevue Ecolodge (234)
94. Lukuamoa Sunrise Bungalow (324)
95. Malowia Guesthouse (235)
96. Mangoes Resort (236)
97. Mariner Apartments (237)
98. Mere Sauwia (325)
99. MK Motel (304)
100. Moorings Hotel (238)
101. Nakie Womens' Guesthouse (239)
102. Napanga Bungalows (240)
103. Nasama Resort (241)
104. Ocean View Apartments (242)
105. Pacific Lagoon Apartments (243)
106. Pacific Paradise Motel (244)
107. Pandanus Bay Waterfront Apartments (245)
108. Paradise Cove Resort (246)
109. Paray Lodge (247)
110. Pario Guest House (305)
111. Paunvina Guesthouse (248)
112. Poppy's on the Lagoon (249)
113. Quest Apartments (250)
114. Ramanda Akiriki Resort (306)
115. Raymonds Bayview (251)
116. Red Flower Guesthouse (307)
117. Room With A View (252)
118. Sandalwood Apartments (253)
119. Sarangkita Ocean Front Retreat (254)
120. Seachange Lodge (255)
121. Sena Papa Bungalows (256)
122. Serety Sunset (257)
123. Simoa Bungalows (258)
124. Starfish Cove (259)

125. Seahorse Bungalow (326)
126. Sunrise Bungalow (327)
127. Sunset Bungalows Resort (260)
128. Sunset Frangipani Bungalow (328)
129. Surfside Vanuatu (261)
130. Tamanu on the Beach (262)
131. Tari Bag Lodge (308)
132. Tebakor Guest House (309)
133. Tempo Holdings Ltd (310)
134. The Grand Hotel & Casino (264)
135. The Havannah (265)
136. The Hub Vanuatu (266)
137. The Melanesian Port Vila (267)
138. The Pacific Casino Hotel (311)
139. The Sportsmens Hotel (268)
140. The Terraces Boutique Apartments (269)
141. Tradewinds Resort (270)
142. Tranquility Island Resort (317)
143. Traveller's Budget Motel (271)
144. Travellers Inn Apartments (272)
145. Travellers Oasis Lodge (312)
146. Treetops Lodge & Bungalows (273)
147. Trinity Orchid Lodge (313)
148. Tropicana Lagoon Apartments Resort (274)
149. Troppo Mystique (275)
150. Uduna Cove Beach Bungalows (276)
151. Vale Vale Beachfront Villas (Efate Island) (277)
152. Vanuatu Executive Retreats (315)
153. Vanuatu Holiday Hotel (278)
154. Vanuatu Rainbow Guesthouse (316)
155. Villa Asana (360)
156. Vila Chaumieres (279)
157. Villa 25 (Efate Island) (280)
158. Wai Melmelo Guest House (281)



159. Warwick Le Lagon Resort & Spa (282)
160. Worawia Holiday Haven (283)

End of Block: Port Vila accommodation

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Start of Block: Port Vila accommodation satisfaction

Q10.4 10.4 How satisfied were you with the following aspects of your most recent stay at [\\${Im://Field/1}](#)?

	Very dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality, availability and maintenance of facilities provided (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10.5 10.5 Please select the Espiritu Santo accommodation(s) you stayed in during your most recent visit.

(You may select multiple accommodations - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one accommodation.)

161. Aore Adventure Sports & Lodge (29)
162. Aore Island Resort (30)

163. Barrier Beach House (31)
164. Bay of Illusions Yacht Club (32)
165. Beachfront Resort (33)
166. Bokissa Private Island Resort (34)
167. Champagne Beach Bungalows (35)
168. Champagne Beach Camping (36)
169. Coral Quays Fish & Dive Resort (37)
170. Deco Stop Lodge (38)
171. Hibiscus Attraction Center (39)
172. Hidden Cove Eco Retreat (40)
173. Hensley's Guest House (87)
174. Hotel Santo (41)
175. Kerepua Bungalow (42)
176. Lajmoli Guest House (43)
177. Lapita Lodge (70)
178. Le Nemo Motel (89)
179. Little Paradise Bungalows (44)
180. Lonnoc Beach Bungalows (45)
181. Lope Lope Lodge (46)
182. Loru Camping (47)
183. Mahi Mahi Villas (90)
184. Malvanua Island Beach House (48)
185. Migotty Motel (49)
186. Motel Le Nemo (50)
187. Moyyan House by the Sea (51)
188. Natakol Bungalow (71)
189. Natapoa Motel (104)
190. Nokome Backpackers (72)
191. Nokome Collen's Bungalow (52)
192. Oyster Island Resort (53)
193. Pandanus Guest House (54)
194. Port Olry Beach Bungalow (55)
195. Ratua Private Island (56)
196. Reef Resort (57)

197. Sunrise Beach Cabanas Eco-Resort (91)
198. Sunset View Guest House (58)
199. Tasiriki Tuetueni Guest House (59)
200. The Espiritu (60)
201. Towock Restaurant & Bungalows (73)
202. Tree House (74)
203. Tropicana Hotel & Backpackers (75)
204. Turtle Bay Beach House (92)
205. Turtle Bay Lodge (61)
206. Unice's Homestay and Bungalow (62)
207. Unity Park Motel (63)
208. Vanilla Guest House (64)
209. Vanuatu Beachfront Apartments (79)
210. Vaton Beach Bungalows (76)
211. Vatthe Lodge (65)
212. Vetape Guest House (66)
213. Village de Santo Resort (67)
214. Vire Lodge (77)
215. Vunaspef Village (68)

End of Block: Espiritu Santo Accommodation

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Start of Block: Espiritu Santo accommodation satisfaction

Q10.6 10.6 How satisfied were you with the following aspects of your most recent stay at  
 \${lm://Field/1}?

	Very dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality, availability and maintenance of facilities provided (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10.7 10.7 Please select the Tanna accommodation(s) you stayed in during your most recent visit.

(You may select multiple accommodations - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one accommodation.)

- 216. Alofa Beach Bungalows (8)
- 217. Blue Reef Resort and Tours (9)
- 218. Friendly Bungalows (10)
- 219. Rocky Ridge Bungalows (11)
- 220. Sunrise Bungalows (20)
- 221. Tanna Adventures Guest Accommodation (12)
- 222. Tanna Evergreen Resort & Tours (13)
- 223. Tanna Lava View Bungalows (14)
- 224. Tanna Lodge (15)
- 225. Tanna Tree Top Lodge (16)
- 226. White Grass Ocean Resort (17)
- 227. Yasur View Bungalows (18)
- 228. Yasur View Lodge (19)

Q10.8 10.8 How satisfied were you with the following aspects of your most recent stay at  
 \${lm://Field/1}?

	Very dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality, availability and maintenance of facilities provided (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q10.9 10.9 Please select the accommodation(s) you stayed in at other islands during your most recent visit.

(You may select multiple accommodations - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one accommodation.)

- 229. Aka Beach Bungalow (38)
- 230. Aore Adventure Sports & Lodge (39)
- 231. Aore Island Resort (1)
- 232. Ameltoro Bungalows (9)
- 233. Big Nambas Bungalow at Tenmaru (10)
- 234. Batis Seaside Guesthouse (11)
- 235. Bella Bungalow (40)
- 236. Bethany Guest House (41)
- 237. Bokissa Island Resort (42)
- 238. Buliva Guesthouse (43)
- 239. Chez Maureen (20)
- 240. Cyndie Fares Bungalows (21)
- 241. Dori Lagoon Bungalows (22)
- 242. Dram-Dram Bungalow (12)
- 243. Eliezer Travel Lodge (23)
- 244. Gateway Lodge (24)
- 245. Golehala Guesthouse (45)
- 246. Happiness Bungalows (25)
- 247. Jicba Guest House (49)
- 248. Josephs Home Stay (50)
- 249. Lagoon View Bungalows (26)
- 250. Lakatoro Palm Lodge (13)
- 251. Lamap Ocean View Guest House (53)
- 252. Laone Guest House (54)
- 253. Leumerus Bungalows (27)
- 254. Levis Beach Side Guest House (55)
- 255. Malog Bungalows (14)
- 256. Manaro Gateway Bungalow (57)

- 257. Moli Guesthouse (28)
- 258. Mota Lava Gateway Lodge (59)
- 259. Nabelchel Bungalow (15)
- 260. Nanwut Bungalows (16)
- 261. Nawori Sea View Bungalows (17)
- 262. NDJ Guest House (62)
- 263. Paradise Lodge & Sailing Adventures (63)
- 264. Peba Memorial Bungalows (29)
- 265. Pialo Small Kastom Village Bungalows (18)
- 266. Rah Beach Bungalows (30)
- 267. Rah Paradise Bungalows (31)
- 268. Ranon Beach Bungalows (4)
- 269. Ratua Private Island (65)
- 270. Sails (66)
- 271. Sam's Guesthouse (5)
- 272. Sea Roar Bungalows (6)
- 273. Seina Bungalows (32)
- 274. Senelich Bungalows (69)
- 275. Sunset Bungalows (33)
- 276. Sylline Guesthouse (7)
- 277. Tammes Bungalows (34)
- 278. Tamata Guest House (74)
- 279. Tam-Tam Bungalows (19)
- 280. Ter Ter Hot Spring Bungalows (8)
- 281. Toa Palms Guest House (75)
- 282. Torgil RTC Guest House (76)
- 283. Totolagh Homestay (35)
- 284. Tranquillity Island Resort & Dive Base (3)
- 285. Tua Guest House (77)
- 286. Tui Guest House (78)
- 287. Tumu Guest House (79)
- 288. Ulkel Guesthouse (36)
- 289. Walarua Guest House (81)
- 290. Wilson Home Stay (82)



291. Wongrass Bungalows (37)

End of Block: Other accommodation

Start of Block: Other accommodation satisfaction

Q10.10 10.10 How satisfied were you with the following aspects of your most recent stay at [\\${lm://Field/1}](#)?

	Very dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality, availability and maintenance of facilities provided (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: Other accommodation satisfaction

Start of Block: Tour operator

Q11.1 11.1 Did you take any organised tours while in Vanuatu on your most recent visit?

☐ Yes (1)

☐ No (2)

Q11.2 11.2 Which of the following Efate (Port Vila) tour operators ran the tour(s) that you took? (You may select multiple operators - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one operator.)

- 292. Adventure Quad Tours (347)
- 293. Adventures in Paradise (348)
- 294. Alen Kalsong (349)
- 295. Andrew Wai (350)
- 296. Around Vanuatu Tour (351)
- 297. Atmosphere Transfers & Tours (352)
- 298. Bali Bali Transfer and Tour (353)
- 299. Bali Hai Custom Village (354)
- 300. Bellevue Horse Ranch (355)
- 301. Big Blue Ltd (356)
- 302. Blokart Vanuatu (357)
- 303. Blue Lagoon (358)
- 304. Blue Marlin Lodge Fishing Charters Vanuatu (359)
- 305. Bosco Tibal (360)
- 306. Buggy Fun Rental (361)
- 307. Capt. Pakoa Taiwia (362)
- 308. Club Hippique Adventure Park (363)
- 309. Coastal Inland Tour Vanuatu (364)
- 310. Coral Car Rental (365)
- 311. Cosmo Consultant (366)
- 312. Cruise Away (367)
- 313. Cruise Fishing Adventure (368)
- 314. Dade Service Agents (369)
- 315. Discount Rentals (370)
- 316. Eden on the River (371)
- 317. Edge Vanuatu (372)
- 318. Elisa Noukout (373)
- 319. Eric LEROUX (374)
- 320. Erick Kaltabang (375)

- 321. Europcar Vanuatu (376)
- 322. Evergreen Tours (377)
- 323. Exotic Tour Vanuatu (378)
- 324. F.P.F Company Limited (379)
- 325. Finding Nemo Tours (380)
- 326. Gahenas Tours Vanuatu (381)
- 327. Go To Rent (382)
- 328. Go Vanuatu Car Hire (383)
- 329. Harbour Fishing Charters (384)
- 330. Harriet's tour (385)
- 331. Hertz (386)
- 332. Hoilday Makers (387)
- 333. Island Time Kayaking (388)
- 334. Island Tours (389)
- 335. Jack Thompson (390)
- 336. James Maukuru (391)
- 337. Jaspat Tour (392)
- 338. Jerry Timothy (393)
- 339. Jo Ellen Tour (394)
- 340. Jo Jo Vanuatu Galavanting Goddess 395)
- 341. Joe'' Jetski Hire 96)
- 342. John Authentic Pele Island Tour (397)
- 343. Kauatani Manumanu (398)
- 344. Kayak Fishing Vanuatu (399)
- 345. Kayaking Vanuatu (400)
- 346. Lelepa Island Day Tours (401)
- 347. LH Pacific Travel (402)
- 348. Local Foodie Tour (403)
- 349. Magic Mountain Segway (404)
- 350. Mangaliliu Nature Walk (405)
- 351. Manples Round Island Tour (406)
- 352. Marian Stephens (407)
- 353. Max Samuel (408)
- 354. Melanesian Tours (409)

- 355. Mere Sauwia (410)
- 356. Meridian Charters (411)
- 357. Meridian Charters Ltd. (412)
- 358. Mick Albert (413)
- 359. MK Rental (414)
- 360. MK Travellers Agency (415)
- 361. Nafonu Tatoka Tours (416)
- 362. Nambanga Tours (417)
- 363. Namoti Resort and Bungalows (418)
- 364. Native Tour (419)
- 365. Naturally Vanuatu (420)
- 366. Nautilus Watersports (421)
- 367. Navanua Tours Ltd (422)
- 368. Nemo Tours (423)
- 369. Nemo Underwater Scooter Limited (424)
- 370. Ocean Walker Vanuatu (425)
- 371. Off Road Adventures (426)
- 372. On Wheels Limited (427)
- 373. Oszen Tour & Consultancy Service (428)
- 374. Pepeyo Cultural & Educational Tour (429)
- 375. Performance Marine Sailing Charters (430)
- 376. Peter Tari (431)
- 377. Port Vila Friendly Tours (432)
- 378. Port Vila Parasailing (433)
- 379. Rendezvous Charters Limited (434)
- 380. Rentapao River Tour (435)
- 381. Rongdale Project (436)
- 382. Ronnie Noal (437)
- 383. RS Sailing (438)
- 384. Safe Shuttle Tours (439)
- 385. Sailaway Cruise (440)
- 386. Saltwater Players Vanuatu Kite Surfing (441)
- 387. Sandy Beach island Tours (442)
- 388. Santo Island Dive & Fishing (443)

- 389. Santo Heritage Tours (490)
- 390. Sea Spray Charter (444)
- 391. Sigary's Taxi Boat (445)
- 392. South Pacific Cruises (446)
- 393. South Pacific Tours (447)
- 394. South Sea Sailing Company (448)
- 395. Steve Maki (449)
- 396. Surata Tamaso Travel (450)
- 397. Tagabe Village Adventure (451)
- 398. Tanna Coffee Roasting Factory (452)
- 399. Taunono Concert (453)
- 400. The Barge (454)
- 401. The Professionals Tours (455)
- 402. The Reef Explorer / The Havannah Jet (456)
- 403. The Secret Garden (457)
- 404. The Summit Vanuatu Tours (458)
- 405. The Vanuatu Tourist Information Centre (459)
- 406. Titus Nauka (460)
- 407. Top Rock Visit (461)
- 408. Tranquillity Island Resort Limited (462)
- 409. Trek Vanuatu (463)
- 410. Tropic Thunder Jet Boat (464)
- 411. Tropical Oasis Cascades and Garden (465)
- 412. U- Power Sea Adventures (466)
- 413. Unity Airlines (467)
- 414. U-Power Zego Sea Safari Adventure (468)
- 415. Vanua Creation Market (469)
- 416. Vanuatu Discovery (470)
- 417. Vanuatu Ecotours (471)
- 418. Vanuatu Ecotours (472)
- 419. Vanuatu Fishing Adventure (473)
- 420. Vanuatu Game Fishing Ltd (474)
- 421. Vanuatu Helicopters (475)
- 422. Vanuatu Island Travel Center (476)

- 423. Vanuatu Islands Sailing (477)
- 424. Vanuatu Jungle Zipline (478)
- 425. Vanuatu Kite Surfing (479)
- 426. Vanuatu Sport Fishing Adventure (480)
- 427. Vanuatu Travel Agency (481)
- 428. Vanuatu Tropical Tours (482)
- 429. Vila Flyboard (483)
- 430. Wantabil Transfer (484)
- 431. Water Shuttle (485)
- 432. Wet and Wild Adventure Park (486)
- 433. Wild Blue Fishing Charters (487)
- 434. World Car Rental (488)
- 435. Your First Travel Agent - Vanuatu (489)

Q11.3 11.4 On your most recent visit, how satisfied were you with the following in terms of:

	Very Dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very Satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the tour/tour guide, and the transport (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money of the tour (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q56 11.3 Which of these tour operators in the other islands ran the tour(s) that you took?  
(You may select multiple operators - on desktop/laptop computers you may need to hold down the CTRL or COMMAND key while clicking in order to select more than one operator.)

- 436. Allan Power Diver Tours (344)
- 437. Aore Adventure Sports & Lodge (345)
- 438. Bokissa Island Resort Pty Ltd (346)
- 439. Coral Quays Fish & Dive Resort (347)
- 440. Cruising Safaris Vanuatu (348)
- 441. Cultural Water Park (349)
- 442. Dambulu Manaro Tour (350)
- 443. Deco Stop Lodge (351)
- 444. Dog's Head Trek (352)
- 445. Fiesta Sportfishing Charters (353)
- 446. Freshwater Plantation (354)
- 447. Island Time Kayaking (355)
- 448. Kalo Pakoa (356)
- 449. Kokonat Wokbaot Tours (357)
- 450. Lamap Dugon Tour (358)
- 451. Lemot Water Music Tour (359)
- 452. Leweton Cultural Village (360)
- 453. Limerose Water Music Tour (361)
- 454. Malampa Travel Call Centre (362)
- 455. Malekula Tours (363)
- 456. Manbush Trail Tour (364)
- 457. Man-Bush Trail Tour (365)
- 458. Manvoi Adventure Bound Trekking Tour (366)
- 459. Maskelyn Island Outrigger Canoe Adventure (367)
- 460. Maskelyne Traditional Fishing Tour (368)
- 461. Millennium Cave Tours (369)
- 462. Modern Village Tour (370)
- 463. Mt Hope Adventure Tour (371)
- 464. Mystery Island Tour (372)



- 465. Napeinapen (373)
- 466. Outrigger Canoe Tour (374)
- 467. Paradise Lodge & Sailing Adventures (375)
- 468. Paradise Tours (376)
- 469. Quadman Vanuatu (377)
- 470. Ringi Te Suh (378)
- 471. Santo Island Tour (379)
- 472. Small Nambas Tour (380)
- 473. Tanna Magical Tour (381)
- 474. The Espiritu (382)
- 475. Vao Cultural Tour (383)
- 476. White Grass Bungalows (384)
- 477. Wrecks to Rainforest (385)

Q59 11.5 On your most recent visit, how satisfied were you with the following in terms of

	Very Dissatisfied (1) (1)	2 (2)	3 (3)	4 (4)	Very Satisfied (5) (5)
The level of service provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of the tour/tour guide, and the transport (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall value for money of the tour (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Please indicate how satisfied you were with each of the following in Vanuatu. (*Use the scale below where 1=Not satisfied at all and 5=Extremely satisfied*)

	Not at all satisfied (1) (1)	2 (2)	3 (3)	4 (4)	Extremely Satisfied (5) (5)
Variety of things to see and do (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restaurants, cafes, bars and evening entertainment (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxis / car / bus / car rental / ground transportation (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local handicrafts / artwork (13)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General quality of service (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet and phone availability, cost and coverage (14)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor information in Vanuatu (including signage) (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rubbish collection and general cleanliness (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for money (17)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General shopping opportunities (18)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q13 13. What did you find most attractive or appealing about Vanuatu on your most recent visit?

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Q14 14. What did you find least attractive or appealing about Vanuatu on your most recent visit?

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Q15 15. Is there anything that could have improved your visit to Vanuatu?

☐ No (1)

#### Q16.0 EXPENDITURE

Information on how much money you spent during your visit helps in the planning and development of the Vanuatu economy.

We would appreciate it if you could fill out this section as accurately as possible.

Q16.1 How much money did you prepay (e.g. package, airfares, accommodation etc) for your most recent visit to Vanuatu? Please fill in the amount and select the currency specified in Question 16.2

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Q16.2 Please select your currency:

☐ AUD (2)

☐ NZD (1)

☐ USD (4)

- ☐ XPF (8)
- ☐ Other - (please specify) (7) \_\_\_\_\_

Q16.3 In this pre-paid expenditure amount, how many people are included (including yourself)?

478. \_\_\_\_\_ Adults (1)
479. \_\_\_\_\_ Children (0- 16 years old) (2)

Q16.4 What did the pre-paid amount include? (tick as many as apply)

480. \_\_\_\_\_ International flights (1)
481. \_\_\_\_\_ Accommodation (2)
482. \_\_\_\_\_ Breakfast/meals (3)
483. \_\_\_\_\_ Domestic transport/airport transfers (4)
484. \_\_\_\_\_ Activities (5)
485. \_\_\_\_\_ Other (please specify) (6)
- \_\_\_\_\_

Q17.1 The following question asks about your expenditure within Vanuatu. Please select the currency that you will use to provide your answer.

- ☐ AUD (2)
- ☐ NZD (1)
- ☐ USD (4)
- ☐ Vatu (3)
- ☐ XPF (10)
- ☐ Other - (please specify) (7) \_\_\_\_\_

Q17.2 While you were in Vanuatu on your most recent visit, how much money did you spend? (Do not include pre-paid amounts). *Please provide estimated numbers in the boxes below using the currency you selected. Text entry not permitted for this question.*

	Efate/Port .....	Espiritu .....	Tanna (3)	Other .....
Domestic travel within .....	1.	2.	3.	4.
Accommodation (1)	5.	6.	7.	8.
Food and beverage .....	9.	10.	11.	12.
Taxis/bus/car hire (2)	13.	14.	15.	16.
Tours/tour operator .....	17.	18.	19.	20.
Entertainment	21.	22.	23.	24.
Internet and .....	25.	26.	27.	28.
Handcraft, souvenirs, .....	29.	30.	31.	32.
Purchases of clothing .....	33.	34.	35.	36.

Services (e.g. massage, haircut, manicure, pedicure)	37.	38.	39.	40.
Purchases of watches & jewellery	41.	42.	43.	44.
Duty free shop (alcohol, cigarettes, perfume, etc.)	45.	46.	47.	48.
Supermarket/general store shopping	49.	50.	51.	52.
Local food from the market	53.	54.	55.	56.

Q17.3 How many people are included in these expenditure estimates (including yourself)?

57. \_\_\_\_\_ Adults (1)

58. \_\_\_\_\_ Children (0–16years old) (2)

Q18.1 Would you return to Vanuatu in the next 5 years?

☐ Yes (1)

☐ No - (If no, please specify why) (2)

\_\_\_\_\_

Q18.2 18.2 If yes, would you include visits to any of the outer islands?

☐ No (1)

☐ Yes – which island(s) would you most like to visit? (2)

\_\_\_\_\_

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Q19 19. How satisfied were you with your overall experience of Vanuatu on this most recent visit?

☐ Very Dissatisfied (1) (1)

☐ 2 (2)

☐ 3 (3)

☐ 4 (4)

☐ Very satisfied (5) (5)

End of Block: Recent visit

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Start of Block: ABOUT YOU

Q20.0 ABOUT YOU

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Q20.1 20. How many times had you been to Vanuatu prior to your most recent visit?

▼ 0 - This was my first time (31) ... 30+ (30)

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Q21 21. Your age group:

☐ 18-29 (1)



☐ 30-39 (2)

☐ 40-49 (3)

☐ 50-59 (4)

☐ 60-69 (5)

☐ 70-79 (6)

☐ 80+ (7)

---

Q22 22. Your gender:

☐ Female (1)

☐ Male (2)

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Q23.1 23.1 What is your approximate annual household income (pre-tax) in your home currency? Please use the following format: e.g. 50,000 and specify currency in question 23.2.

\_\_\_\_\_

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Q23.2 23.2 Please select your currency:

☐ AUD (2)

☐ NZD (1)

☐ USD (4)

☐ XPF (8)

☐ Other - (please specify) (7) \_\_\_\_\_



Q24 24. In which country have you been living for the last 12 months? (Please select)

▼ Afghanistan (1) ... Zimbabwe (193)

Q24.1 24.1 If you live in New Zealand, which region do you live in?

- ☐ Auckland (1)
- ☐ Northland (2)
- ☐ Waikato (3)
- ☐ Bay of Plenty (4)
- ☐ Gisborne (5)
- ☐ Hawke's Bay (6)
- ☐ Taranaki (7)
- ☐ Manawatu-Wanganui (8)
- ☐ Wellington (9)
- ☐ Marlborough-Tasman-Nelson (10)
- ☐ Canterbury (11)
- ☐ West Coast (South Island) (12)
- ☐ Otago (13)
- ☐ Southland (14)

24.3 Please provide your New Zealand post code in the box below. (This helps Vanuatu to better target its limited marketing budget).

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Q24.2 24.2 If you live in Australia, which state do you live in?

- ☐ New South Wales (1)
- ☐ Northern Territory (2)
- ☐ Queensland (3)
- ☐ South Australia (4)
- ☐ Tasmania (5)
- ☐ Victoria (6)
- ☐ Western Australia (7)
- ☐ Australian Capital Territory (8)

Q24.4 Please provide your Australian post code in the box below. (This helps Vanuatu to better target its limited marketing budget).

### *Appendix 3: Accommodation Providers*

Category	Name	Island	Province
Homestays	Christina Homestay	Banks	Torba
	David Homestay	Banks	Torba
	Totolagh Homestay Village	Mota Lava	Torba
	Harbour Fishing Charter	Efate	Shefa
	Mele Village Lodge	Efate	Shefa
	Villa Heimana	Efate	Shefa
	Jatee Homestay	Emae	Shefa
	Mere Sauwia	Nguna	Shefa
	Lewaton Cultural Village	Santo	Sanma
	Towoc Homestay	Santo	Sanma
	Jones Nimbwen	Malekula	Malampa
	Josephs Home Stay	Malekula	Malampa
	Wilak Homestay	Malekula	Malampa
	Sam's Home Stay	Paama	Malampa
	Chez Juliette	Malekula	Malampa
	Ifainia Homestay	Tanna	Tafea
	Tanna Unique Homestay	Tanna	Tafea
Island Bungalows	Happiness Bungalow	Banks	Torba
	Ureparapara Seaside Bungalow	Banks	Torba
	Vureas Twin Bungalow	Banks	Torba
	Chez Maureen Bungalow	Gaua	Torba
	Peba Bungalows	Gaua	Torba

Tammes Bungalows	Gaua	Torba
Weul Bungalows	Gaua	Torba
Wongrass Travel Lodge	Gaua	Torba
Happiness Bungalows	Mota Lava	Torba
Mota Lava Gateway Lodge	Mota Lava	Torba
Rah Beach Bungalow	Mota Lava	Torba
Dori Lagoon Bungalows	Rah	Torba
Rah Paradise Bungalow	Rah	Torba
Kamilisa Bungalow	Torres	Torba
Tutumel Bay Bungalow	Torres	Torba
Twin Beach Bungalow	Torres	Torba
Elizier Travel Lodge	Vanua Lava	Torba
Leumerus Bungalow	Vanua Lava	Torba
Seina Bungalow	Vanua Lava	Torba
Twin Waterfall Bungalow	Vanua Lava	Torba
Back To Eden Café	Efate	Shefa
Blue Bay Resort	Efate	Shefa
Divergent Life Limited T/as Divi's	Efate	Shefa
Eden's Rest Bungalows	Efate	Shefa
Havannah Eco Lodge	Efate	Shefa
Malu's Homestay	Efate	Shefa
Naworawia Bungalow	Efate	Shefa
Raymond's Bay View	Efate	Shefa
The Secret Garden Exotic Resort	Efate	Shefa
Tree Top Lodge	Efate	Shefa
Vatupau Beachfront Bungalows	Efate	Shefa
Emae Sunset Bungalow	Emae	Shefa
Nampuawia Bungalow	Emae	Shefa
Coral Guesthouse	Epi	Shefa
GuesthouseEpi Island Beach Resort	Epi	Shefa

Paradise Sunset Bungalow	Epi	Shefa
Island Breeze Bungalow	Nguna	Shefa
Mangamus Bungalow	Nguna	Shefa
Uduna Cove Beach Bungalow	Nguna	Shefa
Bella Bungalow	Pele	Shefa
J.J Bungalow	Pele	Shefa
Jowi Bungalow	Pele	Shefa
Lukuamoa Sunrise Bungalow	Pele	Shefa
Napanga Bungalow	Pele	Shefa
Sena Pa-pa Bungalow	Pele	Shefa
Sea Horse Bungalow	Pele	Shefa
Serety Sunset Bungalow	Pele	Shefa
Simoa Bungalow	Pele	Shefa
Sunrise Bungalow	Pele	Shefa
Sunset Frangipani Bungalow	Pele	Shefa
Kammy's Guest House	Tongoa	Shefa
Papatau Guest House	Tongoa	Shefa
Two Canoes Bungalow	Santo	Sanma
Destination Port Olry Sunrise Accommodation & Restaurant	Santo	Sanma
Hide Away Paradise Beach Bungalow	Santo	Sanma
Little Paradise of Port-Olry	Santo	Sanma
Lonnoc Bamboo Bungalow	Santo	Sanma
Lonnoc Beach Bungalow	Santo	Sanma
Mahogany Tree House	Santo	Sanma
Port Olry Beach Bungalow	Santo	Sanma
Port Olry Harbour Beach Restaurant	Santo	Sanma
Port Olry Tree House	Santo	Sanma
Vatoav Beach Bungalow	Santo	Sanma
Vaton Beach Bungalow	Santo	Sanma

Ranon Beach Bungalows	Ambrym	Malampa
Sea Roar Bungalow	Ambrym	Malampa
Terter Hot Spring Bungalows	Ambrym	Malampa
Almetoro Bungalows	Malekula	Malampa
Batis Seaside Bungalow	Malekula	Malampa
Big Nambas Bungalow at Tenmaru	Malekula	Malampa
Dram Dram Bungalows	Malekula	Malampa
Leysernavun	Malekula	Malampa
Lumetei Beach Bungalow	Malekula	Malampa
Mahun Bungalows	Malekula	Malampa
Malog Bungalows	Malekula	Malampa
Nabelchel Bungalow	Malekula	Malampa
Nanwud Bungalow	Malekula	Malampa
Nawov Freshwind Bungalow	Malekula	Malampa
Senelich Overwater Bungalows	Malekula	Malampa
South West Bay Beach Front Bungalow	Malekula	Malampa
Sunrise Bungalows	Malekula	Malampa
Sunset Bungalow	Malekula	Malampa
TamTam Bungalow	Malekula	Malampa
Walem Lodge	Malekula	Malampa
Aka Beach Bungalow	Ambae	Penama
Manara Gateway Bungalow	Ambae	Penama
Vui Volcanic Bungalow	Ambae	Penama
Mule Ocean View Guest House	Maewo	Penama
Marie Beach Bungalow	Pentecost	Penama
Alofa Beach Bungalow	Tanna	Tafea
Apera Beachfront Bungalow	Tanna	Tafea
Crystal Blue Lagoon	Tanna	Tafea
Fire heavens Bungalow	Tanna	Tafea
Hidden treasure	Tanna	Tafea

Iwaru Beach Bungalow	Tanna	Tafea
Joe Narua Guest House	Tanna	Tafea
Jungle Oasis	Tanna	Tafea
Lava view Bungalow	Tanna	Tafea
Manmimar lodge	Tanna	Tafea
Port Resolution Yacht club & Bungalow	Tanna	Tafea
Sunset bungalow	Tanna	Tafea
Tanna Adventures	Tanna	Tafea
Tanna Beachfront Bungalow	Tanna	Tafea
Tanna Eco Adventures	Tanna	Tafea
Tanna Fire View Homestay	Tanna	Tafea
Tanna Ikamir bungalow and accomodation	Tanna	Tafea
Tanna Island Dream Bungalow	Tanna	Tafea
Tanna Rocky ridge Bungalow	Tanna	Tafea
Tanna Tree Top Lodge	Tanna	Tafea
Tanna Yasur View Bungalow	Tanna	Tafea
Volcanic Village Visita	Tanna	Tafea
Volcano Eco with treehouse	Tanna	Tafea
Volcano Roaring Front	Tanna	Tafea
White Beach Bungalow	Tanna	Tafea
Yasur View lodge	Tanna	Tafea

## Campsites

Victor Campsite	Gaua	Torba
Tony Paradise Beach and Day Tour	Gaua	Torba
Paul Campsite	Gaua	Torba
ESPAVO	Efate	Shefa
Havannah Beach and Boat Club	Efate	Shefa
Manvoi Adventure Boun	Ambrym	Malampa
Trekking Tour	Ambrym	Malampa



## Guest Houses

Alo Lodge  
 Bethany Guest House  
 Buliva Guest House  
 Esuva Guesthouse  
 Fresh Wind Guest House  
 Freshwater Lodge  
 Golehala Guest House  
 Jabsina Guest House  
 Jalom Guest House  
 Jicba Guest House  
 Jonas Wanmei Guest House  
 Jupoes Guest House  
 Karina Guest House  
 Lakatoro Palm Lodge  
 Lamap Ocean View Guest House  
 Laone Guest House  
 Lenakel Lodge  
 Levis Beach Side Guest House  
 LodgeEntani Company Limited  
 Louise Guest House  
 Lucia Guest House  
 Malowia Guest House  
 Merenien Guest House  
 Mula Guesthouse  
 Nak Guest House  
 Nakie Guest House  
 Nali Guest House  
 Namba 2 Transit Lodge  
 Nawori Seaview Bungalow

Malekula  
 Ambae  
 Pentecost  
 Mota Lava  
 Emae  
 Port Vila  
 Pentecost  
 Port Vila  
 Nguna  
 Ambae  
 Ambrym  
 Nguna  
 Ambrym  
 Malekula  
 Malekula  
 Pentecost  
 Tanna  
 Malekula  
 Port Vila  
 Ambae  
 Port Vila  
 Port Vila  
 Malekula  
 Vanua Lava  
 Pentecost  
 Nguna  
 Ambrym  
 Port Vila  
 Malekula

Malampa  
 Penama  
 Penama  
 Torba  
 Shefa  
 Shefa  
 Penama  
 Shefa  
 Shefa  
 Penama  
 Malampa  
 Shefa  
 Malampa  
 Malampa  
 Malampa  
 Penama  
 Tafea  
 Malampa  
 Shefa  
 Penama  
 Shefa  
 Shefa  
 Malampa  
 Torba  
 Penama  
 Shefa  
 Malampa  
 Shefa  
 Malampa

NDJ Guest House	Ambae	Penama
Nicky's Homestay	Port Vila	Shefa
Noda Guest House	Pentecost	Penama
Panlike Guest House	Pentecost	Penama
Paray Lodge	Port Vila	Shefa
Pario Guest House	Port Vila	Shefa
Paunvina Guest House	Nguna	Shefa
Piaolo Small Custom Village	Malekula	Malampa
Pui Lodge & Cultural Tour	Santo	Sanma
Qweros Lodge	Malekula	Malampa
Raynold's Board and Lodge	Port Vila	Shefa
Red Flower Guesthouse	Port Vila	Shefa
River Guest House	Pentecost	Penama
Sam's Guest House	Ambrym	Malampa
Serah Joe Guest House	Port Vila	Shefa
Star Lodge	Port Vila	Shefa
Sylline Guest House	Ambrym	Malampa
Talapoa Guest House	Tanna	Tafea
Tamata Guest House	Pentecost	Penama
Tarivuha Guest House	Ambae	Penama
Taunlam Rock Guest House	Port Vila	Shefa
Tautu Garden Lodge	Malekula	Malampa
Tebakor Guest House	Port Vila	Shefa
Titinson Guest Hous	Ureparapara	Torba
Toa Palms Guest House	Ambae	Penama
Torgil RTC Guest House	Ambae	Penama
Tua Guest House	Ambae	Penama
Tui Guest House	Ambae	Penama
Tumu Guest House	Pentecost	Penama
Ulkel Guest House	Vanua Lava	Torba

	Vanuatu Rainbow Lodge	Port Vila	Shefa
	Wai Melmelo Guest House	Port Vila	Shefa
	Walarua Guest House	Pentecost	Penama
	Zanoli Guest House	Ambrym	Malampa
Hotels	Airlines Business Hotel	Port Vila	Shefa
	Business Class Hotel	Port Vila	Shefa
	Crystal Beach Hotel	Port Vila	Shefa
	Crystal Blue Resort	Port Vila	Shefa
	Golden Port Hote	Port Vila	Shefa
	Hornet Ltd T/A Hotel Olympic	Port Vila	Shefa
	Hotel Santo Limited	Santo	Sanma
	L & C Investment Holding Limited	Port Vila	Shefa
	Luganvilla Hotel	Santo	Sanma
	Moorings Hotel	Port Vila	Shefa
	Ohana Investments T/as Chateaux Bellevue	Port Vila	Shefa
	Sunny Red Operations Limited T/as Grand Hotel and Casino	Port Vila	Shefa
	Tanna Lodge	Tanna	Tafea
	The Espiritu	Santo	Sanma
	The Melanesian Port-Vila	Port Vila	Shefa
	Vanuatu Beachfront Apartments	Port Vila	Shefa
	Vanuatu Holiday Hotel	Port Vila	Shefa
	Vanuatu Travel Agency	Port Vila	Shefa
	Village De Santo	Santo	Sanma
Corporate hotels	Grand Hotel and Casino	Port Vila	Shefa
	The Melanesian Port-Vila	Port Vila	Shefa
	Chantilly's on the Bay	Port Vila	Shefa

Motels	Amare Holdings T/A Travellers Budget	Port Vila	Shefa
	Central Bay Motel	Port Vila	Shefa
	Central Inn	Port Vila	Shefa
	City Lodge	Port Vila	Shefa
	City Motel	Port Vila	Shefa
	Ecolodge Les Cottages de Bellevue	Port Vila	Shefa
	Golden Dragon Motel	Port Vila	Shefa
	Island Motel	Port Vila	Shefa
	Kaiviti Motel	Port Vila	Shefa
	MK Motel	Port Vila	Shefa
	Ocean View Apartment	Port Vila	Shefa
	Pacific Paradise Motel	Port Vila	Shefa
	Sea Change Lodge	Port Vila	Shefa
	Tempo Holdings LTD	Port Vila	Shefa
	Tenet Ltd T/A Pacific Lagoon Apartments	Port Vila	Shefa
	Tradewinds Villas	Port Vila	Shefa
	Traveller's Budget Motel	Port Vila	Shefa
	Trinity Orchid Lodge	Port Vila	Shefa
	Vila Hibiscus Motel	Port Vila	Shefa
	Coral Sea Motel	Santo	Sanma
	Deco Stop Lodge	Santo	Sanma
	Hibiscua Attraction Center	Santo	Sanma
	Mataweli Motel	Santo	Sanma
	Migotty Motel	Santo	Sanma
	Natapoa Motel	Santo	Sanma
	Rah Lifestyle	Santo	Sanma
	Tropicana Motel & Backpackers	Santo	Sanma
	Unity Park Motel	Santo	Sanma

## Resorts

Aquana Beach Resort	Port Vila	Shefa
Benjor Pty Ltd T/A Benjor Beach Resort	Port Vila	Shefa
Breakas Beach Resort	Port Vila	Shefa
Cocomo Resort	Port Vila	Shefa
Coco Beach Resort	Port Vila	Shefa
Green Tri	Port Vila	Shefa
Hideaway Island Resort	Port Vila	Shefa
IPM Ltd T/A Namasa Resort	Hideway	Shefa
Lagoon Ventures Ltd T/A Vila Chaumiere	Port Vila	Shefa
Kakula Private Island	Port Vila	Shefa
La Mar Resort	Kakula	Shefa
MJW Limited T/A Poppys on the Lagoon	Port Vila	Shefa
Mangoes Resort & Restaurant	Port Vila	Shefa
Onix Luxury Resort Residences	Port Vila	Shefa
Reflections Retreat	Port Vila	Shefa
Retreat Seaside Resort & Bar	Port Vila	Shefa
Coconut Palms Resort	Port Vila	Shefa
Starfish Cove	Efate	Shefa
Sunset Bungalow Resort	Port Vila	Shefa
Teouma Reef Resort	Port Vila	Shefa
The Terraces Vanuatu	Port Vila	Shefa
Tranquility Island Resort	Port Vila	Shefa
Island Magic Resort	Port Vila	Shefa
ValeVale Beach Front Villas	Port Vila	Shefa
Vila Rose Resort	Port Vila	Shefa
Erakor Island Resort & Spa	Port Vila	Shefa
	Erakor	Shefa
Raw Luxury Adventures Ltd T/A Aore Island Resort	Santo	Sanma

	Bokissa Island Resort	Santo	Sanma
	Coral Quays Fish and Dive Resort	Santo	Sanma
	Hideway on the Barrier Beach	Santo	Sanma
	Sunrise Beach Cabanas	Santo	Sanma
	Turtle Bay Resort	Santo	Sanma
	White Grass Bungalows	Tanna	Tafea
Major Resorts	Warwick Le Lagon Resort & Spa	Port Vila	Shefa
	Iririki Island Resort	Iririki	Shefa
	Holiday Inn Resort Vanuatu	Port Vila	Shefa
	Ramada Akiriki		
Self-contained stays	2nd Tropicana Apartment	Port Vila	Shefa
	Anaburu Pacific Lodge	Port Vila	Shefa
	Angel Fish Cove Villas	Port Vila	Shefa
	Antoine Boudier	Port Vila	Shefa
	Aore Art Café	Santo	Sanma
	Aore Eco Retreats	Santo	Sanma
	Aore Island Coffee	Santo	Sanma
	Atmosphere(Vanuatu) Limited	Port Vila	Shefa
	Blue Lagoon Bungalow	Port Vila	Shefa
	Blue Marlin Lodge Bungalow	Port Vila	Shefa
	Breadfruit Apartments Limited	Port Vila	Shefa
	Canal 2 Motel	Santo	Sanma
	Coral Motel	Port Vila	Shefa
	Fatumaru Lodge	Port Vila	Shefa
	Fresh water Plantation	Santo	Sanma
	Golden Palm	Port Vila	Shefa
	Island Lights Bungalow	Santo	Sanma

Island View Cottages	Santo	Sanma
Kava Motel	Port Vila	Shefa
Koyu Apartments	Port Vila	Shefa
Lapita Lodge Conferencing & Catering Center	Santo	Sanma
Le Life Resort	Port Vila	Shefa
Mahi Mahi Villas	Santo	Sanma
Malekula Holiday Villas	Malekula	Malampa
Malvanua Beach House	Malvanua	Sanma
Mariner Apartments Management Ltd	Port Vila	Shefa
Matevulu Lodge	Santo	Sanma
Natora Beach House & Appartments	Santo	Sanma
Nautilus Watersports	Port Vila	Shefa
Ocean Point Villa	Santo	Sanma
Pandanus Apartment	Port Vila	Shefa
Paradise Lodge & Sailing Adventures	Santo	Sanma
Pasi Lodge	Port Vila	Shefa
Plantation Villas	Port Vila	Shefa
Quest Apartments	Port Vila	Shefa
Reef Zoological Bungalows	Port Vila	Shefa
Ripples on the Bay	Port Vila	Shefa
Room With a View	Port Vila	Shefa
Sails	Santo	Sanma
Santina Sunrise	Port Vila	Shefa
Santo B & B	Santo	Sanma
Santo Beach Bungalows	Santo	Sanma
Santo Saffire	Santo	Sanma
Santo Seaside Villas	Santo	Sanma
Santo Vista Cottage	Santo	Sanma
The Hub	Port Vila	Shefa
Turtle Bay Beach House	Santo	Sanma

	Vaemoli Dreams	Port Vila	Shefa
	Vanuatu Executive Retreats	Port Vila	Shefa
	Vila Life	Port Vila	Shefa
	Vila Lodge 555	Port Vila	Shefa
	Villa Gimini	Port Vila	Shefa
Boutique Resorts	Whitegrass Ocean Resort	Tanna	Tafea
	Rockwater Resort	Tanna	Tafea
	Ratua Private Island	Santo	Sanma
	Barrier Beach Resort	Santo	Sanma
	Eratrap	Port Vila	Shefa
	Trees and Fishes Ltd	Port Vila	Shefa
	Tamanu on the Beach	Port Vila	Shefa
	The Havannah Resort	Port Vila	Shefa
	The Moso	Port Vila	Shefa
Unique stays	Havannah Fishing Lodge	Port Vila	Shefa
	La Maison Du Banian	Port Vila	Shefa
	The Pacific Casino Hotel	Port Vila	Shefa
	Hidden Cove Eco - Retreat	Santo	Sanma
Holiday homes	Aoredise	Santo	Sanma
	Bukura Beach House	Port Vila	Shefa
	Waves at Surfside	Port Vila	Shefa
	Waves at Bukura	Port Villa	Shefa