



International Visitor Survey 2016

December 2016

Prepared for SIVB
By StollzNow Research

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1 FOREWORD



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The 2016 International Visitor Survey (IVS) provides a summary of key statistics and information to help improve the quality and enhance services for visitors to Solomon Islands. A IVS captures the data for all visitors including holiday/vacation, business, visiting friends or relatives and other reasons for visiting.

The IVS is a key measure of visitors that will be used by Government and the private sector to develop and service all visitor types. It is important to understand that all visitors contribute to the Solomon Islands economy and they also participate in recreational activities.

A key outcome of the IVS is understanding the holiday/vacation market and tracking the growth of this sector. Currently holiday/vacation visitors are around one-quarter of all visitors, but with management this sector will grow and has the potential to be a major revenue earner for Solomon Islands.

The Ministry of Culture and Tourism is very pleased with the outcome of the IVS because it will assist in guiding the Government's decision to further invest in the tourism sector where it matters. Understanding the market enables the Ministry and SIVB to devise strategic approaches that will yield the results and growth of the sector in the short to medium term.

Repeating this project in future years will show the growth, development and revenue from all visitors. With an ongoing IVS, the Ministry will continue to develop and demonstrate the case for more Government recognition of the sector in the long term.

Fieldwork for the 2016 Solomon Islands International Visitor Survey was carried out between 19 April 2016 and 14 October 2016.

A handwritten signature in black ink, appearing to read 'Andrew Nihopara'.

Andrew Nihopara
Permanent Secretary
Ministry of Culture and Tourism

1.1 ACKNOWLEDGEMENTS

We would like to acknowledge the support of the Ministry of Culture and Tourism in completing this project.

2 KEY FINDINGS

Overview

Solomon Islands Visitors Bureau (SIVB) commissioned an International Visitors Survey (IVS) to be completed. SIVB staff carried out the fieldwork and StollzNow Research developed the survey instrument, managed the interviewing procedure and prepared this report.

The IVS is a survey of all visitors; this is any person who has visited Solomon Islands for less than one year and is not a resident or in paid employment in Solomon Islands.

Between April 18 and October 16 2016, 400 face-to-face interviews were carried out at Honiara International Airport with departing visitors in the departure lounge. This sample size gives a confidence level of $\pm 4.8\%$ at the 95% confidence interval.

Visitor spend (revenue)

All amounts included in this report are in Solomon Island dollars.

Visitors spend an average of \$1,493 per-person per-day.

Using a method that used average spend per-person per-visit, visitors spend an estimated \$233 million¹ in Solomon Islands. Almost half of this (\$102 million) is spent on accommodation – though this may also include some meals. Spend on transfers is \$58 million, domestic Solomon airmiles \$18 million, activities \$5 million, meals (breakfast, lunch and dinner) \$9 million, drinks \$10 million and \$18 million in ‘other’ areas.

The source market with the largest spend is Australia with \$105 million. This is followed by New Zealand (\$28 million) and United Kingdom (\$27 million).

The largest spend by reason for visit comes from business/conference with \$88 million followed by holiday/vacation with \$62 million.

Guadalcanal Province has the largest spend with \$163 million of which \$159 million is spent in Honiara.² This is followed by Western Province with \$37 million and Central Province with \$15 million.

All spend data is based on visitors for 2016. At the time of reporting only data for January to July is available, so other months are currently estimated visitors. Estimated spend will be updated in a supplementary report once final visitors are known.

Province visited

Almost all visitors (93%) spend one or more nights in Honiara. The capital makes up seventy-four percent (74%) of all nights spent in Solomon Islands. Nights in Honiara can be explained by the need to spend nights on arrival and departure to meet internal transport times.

¹ Amounts rounded to nearest million dollars

² See Section 6.8 for a full explanation of how spend by Province is allocated

Western Province has thirteen percent (13%) of all visitor nights, Isabel Province (4%) Malaita four percent (4%) and Central Province two percent (2%).

On average visitors travel to 1.42 different Provinces.

Main reason for visiting Solomon Islands

The main reason for visiting Solomon Islands is business/conference (38%) followed by holiday/vacation (30%) and visiting friends or relatives (17%).

Of the thirty percent (30%) who visited for holiday/vacation, thirty-eight percent (38%) visited for rest and relaxation, twenty-eight percent (28%) for scuba diving and twenty-two percent (22%) for Solomon Islands culture. These are 'main reasons' for visiting, so more people may have participated in scuba diving, culture and other activities.

Length of stay

The average length of stay is 15.1 days but the average does not accurately describe visitors. Sixty-four percent (64%) stay 10 days or less while five percent (5%) stay for 50 or more days.

The Standard Deviation of the average is 27, which means that there is extreme variation in this figure and it cannot be used to estimate total nights in Solomon Islands with any degree of reliability.

Previous visits to Solomon Islands

Fifty-one percent (51%) of visitors have previously come to Solomon Islands. This is higher for those from Australia (56%), New Zealand (58%) and Fiji (56%). It is lower for those from the long-haul markets of Continental Europe (4%) and United Kingdom (30%).

Those visiting for business/conference are more likely to have made a previous visit (65%) and those visiting for holiday/vacation less likely to have made a previous visit (20%).

Visit rating recommendation

Ninety-one percent (91%) found their visit either 'very enjoyable' or 'enjoyable'. Almost no one found their visit disappointing.

Almost all (86%) would either 'probably' or 'definitely' recommend Solomon Islands to friends, relatives or colleagues at home. Those visiting for holiday/vacation are more likely to recommend Solomon Islands to others (combined 89%).

Visits in next 5 years

Over three-quarters (76%) say they are 'likely' or 'very likely' to return in the next 5 years. This is higher for those visiting for business/conference (81%) and lower for those visiting for holiday/vacation (61%). Even those from long-haul source markets say they are likely to return in the next 5 years; USA/Canada (46%), Continental Europe (52%) and United Kingdom (50%).

Visitor highlights and disappointments

Visitor highlights could not easily be classified, but 'friendly people' is the standout highlight.

Over half (53%) could not name a poor experience. There is no significant poor experience.

Gender

Gender has a skew to men (59%) compared to women (41%).

Age of visitors

Most visitors are either aged 19 to 44 years (38%) or 45 to 64 years (41%). Few under 18 years visit (7%).

Method of booking travel and accommodation

Few people book a travel package (12%), with most people either pre-booking specific elements of travel (28%) or paying directly in Solomon Islands (60%).

Air travel was booked through travel agents (41%) and online aggregators³ (31%).

One-third (33%) booked accommodation through friends, relatives or business in Solomon Islands. Twenty percent (20%) used a travel agent and nineteen percent (19%) an online aggregator.

Airlines used for travel

The airlines most used for travel to Solomon Islands are Virgin Australia (47%), Solomon Airlines (28%) and Fiji Airways (10%).

Just over one-quarter (26%) used a different airline to depart from Solomon Islands. Analysis suggests that this is most likely when travelling to another Pacific Island destination.

Holiday/vacation attractions

The key attractions for holiday/vacation visitors are:

- Culture (40%)
- Activities (32%)
- Friendly people (31%)
- Curiosity (30%)
- Scenery (28%)
- Beaches (25%)
- Climate (23%)

³ Expedia, Hotels.com etc.

Activities

The key activities carried out by visitors are:

- Sightseeing/cultural tours (40%)
- Swimming/snorkelling (36%)
- Shopping (28%)
- Historical/archeological sites (16%)
- Hiking/trekking (14%)
- Nature/landscape touring (14%)
- Scuba diving (10%)

Just under one-quarter (24%) did not carry out any activities.

Over one-quarter (28%) of holiday/vacation visitors carried out scuba diving.

Information sources

Online sites are by far the most used information source for visitors. Sixty-one percent (61%) of all visitors used internet sites and seventy-six percent (76%) of first time visitors.

Other information sources used by all visitors are:

- Friends and relatives (44%)
- Previous visits (30%)
- Travel guide books (11%)

3 APPROACH, METHODOLOGY AND SAMPLE

3.1 Past research and survey instrument

Two previous IVS surveys have been carried out; one by StollzNow Research in 2008 and another by South Pacific Tourism Organisation (SPTO) in 2013. With some minor exceptions, this report does not reference these previous research projects as the requirements for 2016 were for a new survey instrument that captured data in more detail.

A focus of the 2016 research was to capture spend data that included the ability to allocate revenue from visitors to each Province.

The questionnaire used and all reporting details and considerations are included in this report so that any organisation can replicate this project.

3.2 Data collection

Data was collected by face-to-face interviewing from departing visitors at Honiara International Airport departure lounge. Interviewing was carried out from April 18 2016 to October 16 2016.

3.3 Sample

The sample was chosen by a random selection approach. Visitors were approach to participate in a pre-set random approach where the person in every fifth seat was interviewed unless they were part of a group sharing the same expenses who were already interviewed.

A sample size of 400 was obtained giving a confidence level of $\pm 4.8\%$ at the 95% confidence interval.

3.4 Interviewing groups

The survey was constructed to include responses for all in the group sharing the same expenditure. This approach means that children are included in the data.

3.5 Interview exclusions

Those who had spent more than 12 months in Solomon Islands (for any reason) or are Solomon Island residents were not included in the survey.

3.6 Analysis

3.6.1 Confidence level

Differences are reported when they are statistically significant at the 95% confidence level.

Where tabled data is coloured blue or red, blue signifies that the differences are statistically above the average and red is below the average. Black text means that the data is on average.

Analysis is carried out by cross-tabulation. Key forms of analysis are by:

- Source market
 - The country of residence for visitors
- Main reason for visiting Solomon Islands
- Province visited

Classification by Province includes multiple Provinces. Ninety-two percent (92%) spent one or more nights in Honiara. The exception to this is expenditure where visitors were classified into the Province where they spent the most nights.

4 ARRIVAL DATA

Table 1: Visitor arrival data used in this report

	2016	Status
January	1,655	Collected
February	1,707	Collected
March	1,675	Collected
April	1,799	Collected
May	1,896	Collected
June	1,984	Collected
July	2,319	Collected
August	1,862	Estimate
September	1,862	Estimate
October	1,862	Estimate
November	1,862	Estimate
December	1,862	Estimate
Total	22,346	

Source: Solomon Islands Visitors Bureau

This report has been written prior to the end of 2016 and visitor arrival data from August to December was not available. To allow for this missing data an average of all other months has been used.

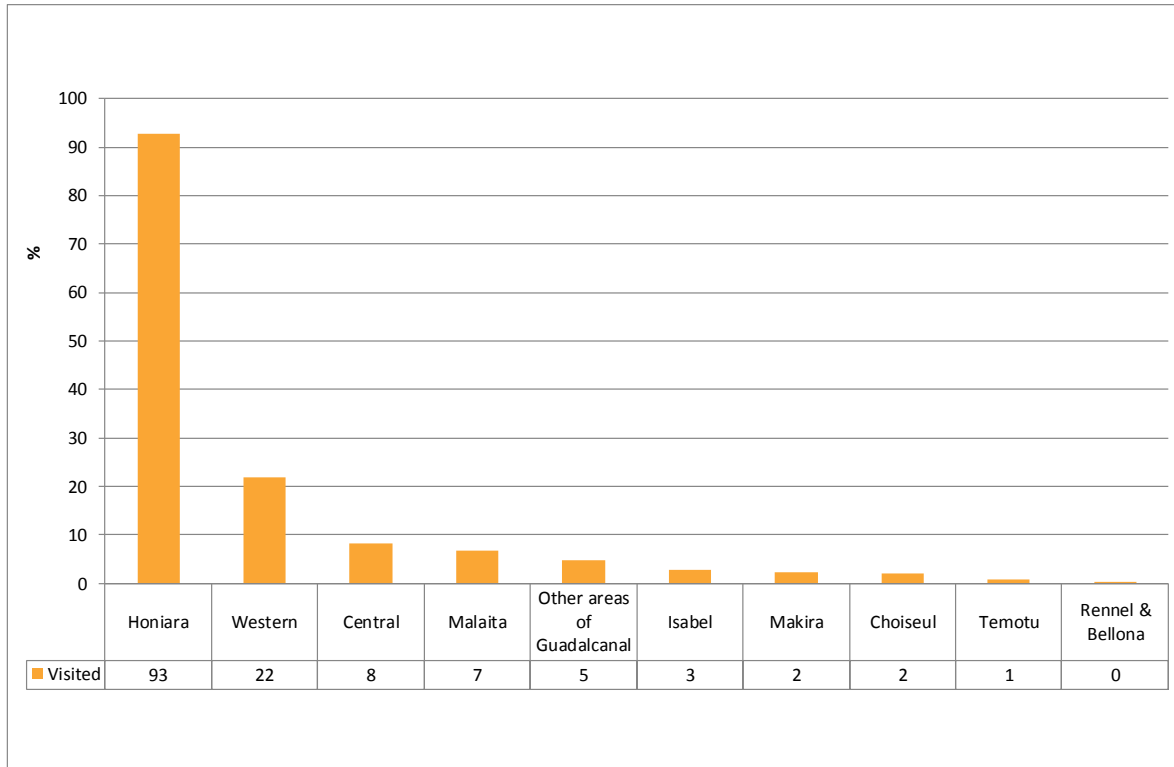
The estimated spend data will be updated once the final figures for 2016 are published.

5 VISITING SOLOMON ISLANDS

5.1 Provinces visited

Chart 1: Q26 Provinces visited

Base: 400



This data is based on nights spent in each Province. Visiting is one or more nights in each Province.

Most (93%) visitors spent one or more nights in Honiara. Twenty-two percent (22%) visited Western, eight percent (8%) Central, seven percent (7%) Malaita, five percent (5%) areas outside Honiara in Guadalcanal, three percent (3%) Isabel, two percent (2%) Makira, two percent (2%) Choiseul and one percent (1%) Temotu. In the research there was one visitor who spent nights in Rennel and Bellona.

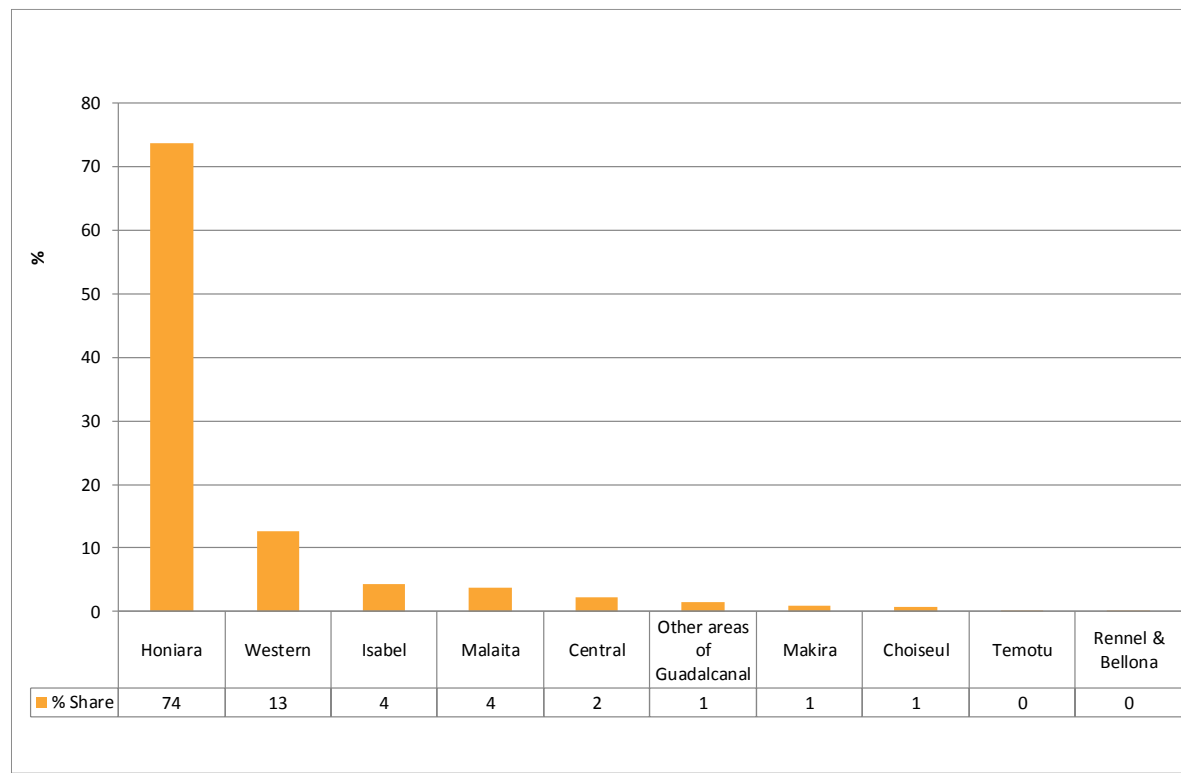
On average 1.43 Provinces were visited.

Honiara is both the destination and only place visited for many arrivals, but also a short term stay to meet transport links.

5.2 Visitor nights by Province

Chart 2: Q26 Number of nights in each Province (percent share)

Base: 400



A better way to understand visitors to Solomon Islands is by the percentage of nights spent in each Province. The 'percent share' method is described in Section 13.9.5.

This analysis uses the number of nights spent in each location to understand visitor behaviour. This is also used to allocate spend in Provinces.

Honiara has seventy-four percent (74%) of all visitor nights:

- Western District 13%
- Isabel 4%
- Malaita 4%
- Central 2%
- Other areas of Guadalcanal 1%
- Makira 1%
- Choiseul 1%

In the research less than 0.5% of nights were spent in Temotu and Rennel and Bellona.

Table 2: Q26 Visitor nights by source market (percent share)

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK
Honiara	74	74	78	91	73	64	66	58	90
Western	13	14	17	2	10	14	17	2	7
Isabel	4	2	1	0	3	0	0	39	0
Malaita	4	4	2	2	0	5	11	0	1
Central	2	2	1	1	13	5	3	0	0
Other areas of Guadalcanal	1	1	0	3	2	5	2	1	0
Makira	1	2	0	0	0	3	0	0	1
Choiseul	1	1	0	1	0	2	0	0	1
Temotu	0	0	0	0	0	0	1	0	0
Rennel & Bellona	0	0	0	0	0	1	0	0	0

Base: all visitors

There are few differences in nights by Province for source market.

Table 3: Q26 Visitor nights by main reason for visit (percent share)

Base: 400

	NET	Business/ Conference	Holiday/ Leisure/ Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Honiara	74	85	42	72	65	33	89
Western	13	9	32	7	5	67	7
Isabel	4	2	4	13	0	0	0
Malaita	4	1	9	6	12	0	0
Central	2	0	7	1	7	0	2
Other areas of Guadalcanal	1	1	5	1	4	0	0
Makira	1	1	1	1	0	0	1
Choiseul	1	1	1	0	7	0	1
Temotu	0	0	0	0	0	0	0
Rennel & Bellona	0	0	0	0	0	0	0

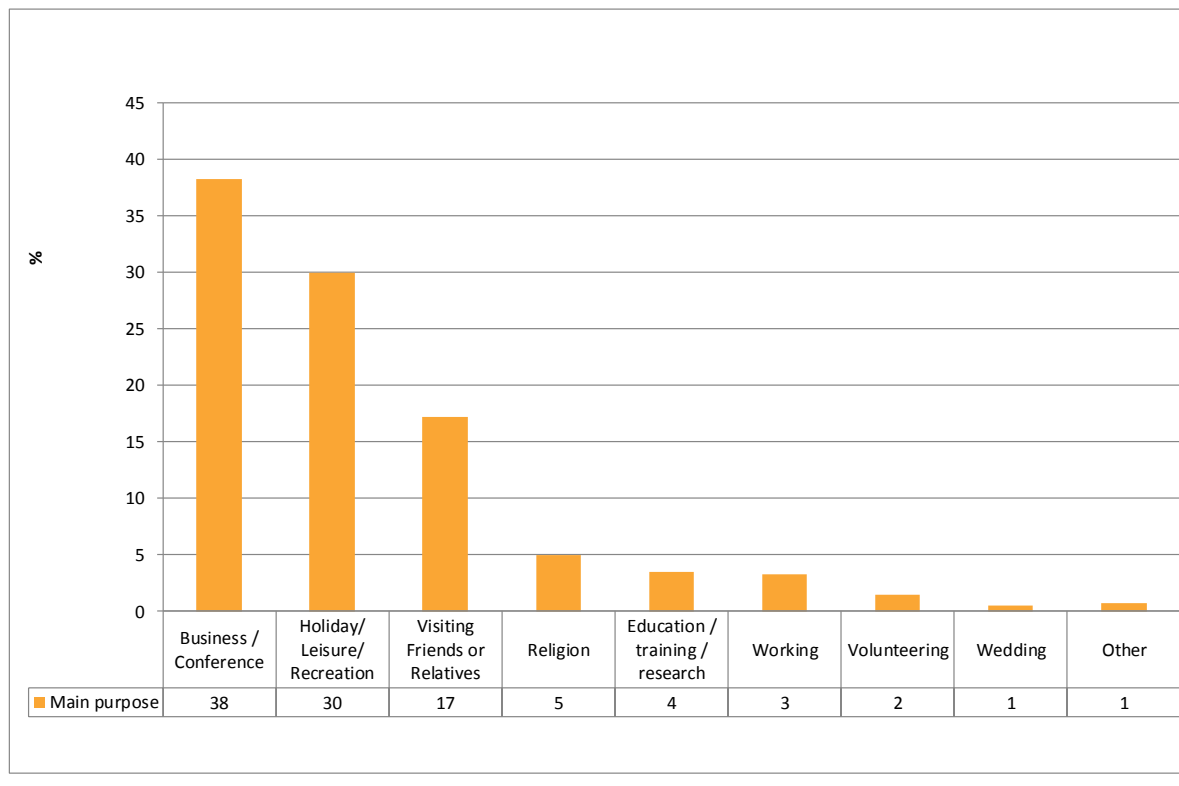
Base: all visitors

Visitors to Solomon Islands for 'holiday/leisure/recreation' spend thirty-two percent (32%) of their nights in Western Province compared to the average of only thirteen percent (13%) of nights. This group also have above average nights in Central Province (7%) and other areas of Guadalcanal (5%). They spend far fewer nights in Honiara (42%) than the average of seventy-four percent (74%) of nights.

5.3 Main purpose of visit

Chart 3: Q14 Main purpose of visit

Base: 400



Base: all visitors

Business / conference accounts for thirty-eight percent (38%) of visitors. 'Holiday / leisure / recreation' is close, with thirty percent (30%) of visitors. Visiting friends or relatives is seventeen percent (17%) of visitors.

Table 4: Q14 Main purpose of visit by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Business / Conference	38	35	46	66	18	41	17	47	60	0
Holiday / Leisure / Recreation	30	27	21	9	57	33	74	26	20	0
Visiting Friends or Relatives	17	22	17	9	14	11	9	5	10	100
Religion	5	6	2	6	4	4	0	11	0	0
Education / training / research	4	3	8	3	4	4	0	0	0	0
Working	3	3	4	6	0	4	0	5	10	0
Volunteering	2	2	0	0	4	4	0	0	0	0
Wedding	1	1	0	0	0	0	0	0	0	0
Other	1	0	2	0	0	0	0	5	0	0

Base: all visitors

Business / conference visitors are more likely to come from Fiji (66%) and less likely to come from USA / Canada (18%) and Continental Europe (17%).

Holiday / leisure / recreation visitors are more likely to come from USA / Canada (57%) and Continental Europe (74%).

Those visiting friends or relatives are more likely to come from Australia (22%).

Table 5: Q14 Main purpose of visit by Province visited

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Business / Conference	38	41	11	20	9	15	39
Holiday / Leisure / Recreation	30	26	53	58	55	30	36
Visiting Friends or Relatives	17	18	26	11	9	33	11
Religion	5	5	11	1	9	15	4
Education / training / research	4	4	0	5	3	7	4
Working	3	4	0	2	3	0	4
Volunteering	2	2	0	1	12	0	4
Wedding	1	0	0	1	0	0	0
Other	1	1	0	0	0	0	0

Base: all visitors

Forty-one percent (41%) of those visiting Honiara have business / conference as their main purpose. Visitors to Honiara are less likely (26%) to visit for holiday / leisure / recreation.

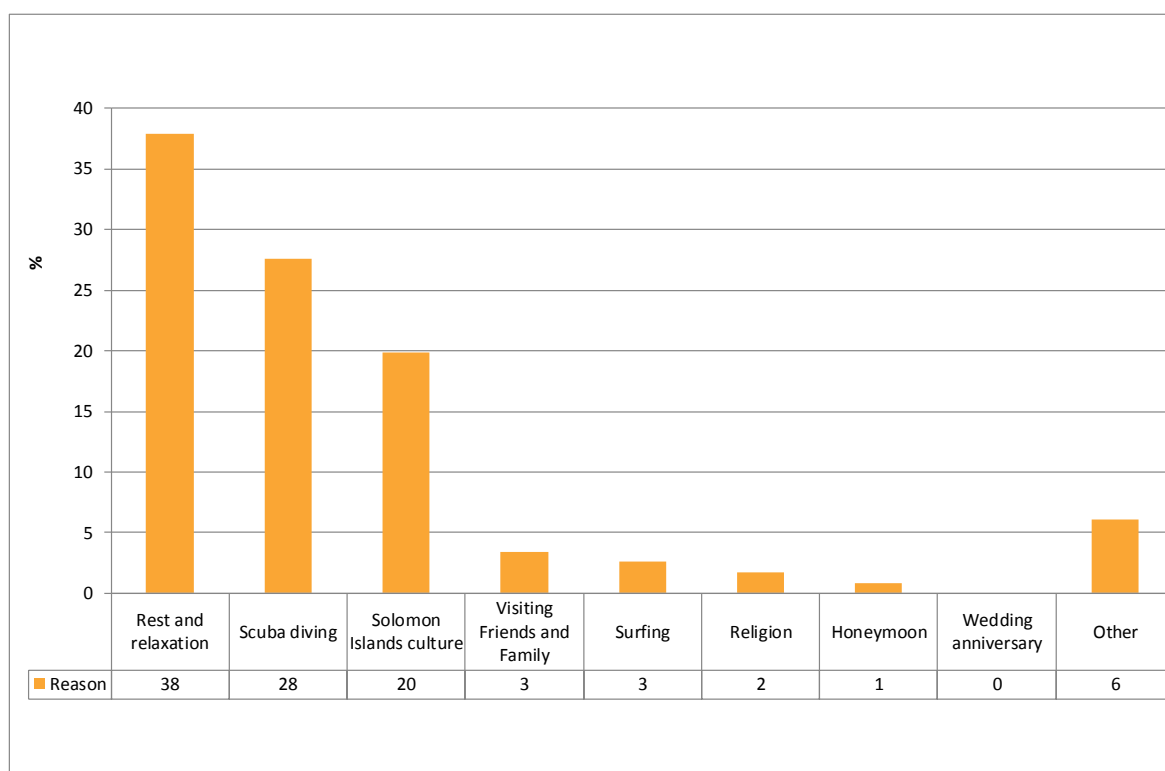
Those visiting for holiday / leisure / recreation make up over half (53%) of visitors to other areas of Guadalcanal, fifty-eight percent (58%) of visitors to Western Province and fifty-five percent (55%) of visitors to Central Province.

Of those visiting Malaita one-third (33%) have visiting friend or relatives as their main purpose of visit.

5.4 Main reason for visiting Solomon Islands for holiday/vacation

Chart 4: Q15 Main reason for holiday/vacation

Base: 116



Base: all holiday/vacation visitors

There are three main reasons for visiting Solomon Islands for a holiday/vacation:

- Rest and relaxation 38%
- Scuba diving 28%
- Solomon Islands culture 20%

Main reason does not mean that other aspects are unimportant. Those visiting for rest and relaxation can scuba dive or participate in Solomon Islands culture.

5.4.1 Differences by source market

There are no significant differences for visiting Solomon Island for holiday/vacation by source market.

5.4.2 Differences by provinces visited

There are no significant differences for visiting Solomon Island for holiday/vacation by Provinces visited.

5.5 Length of stay

5.5.1 Average and median length of stay

The average length of stay in Solomon Islands is 15.1 days. However this figure is misleading as it includes a small number ($n=3$) who stayed for almost a year which skews the data. In the report analysis, we are using the *median*⁴ rather than average. The median length of stay is 8 days.

There are no differences in median length of stay by source market, main reason for visiting and Province visited.

5.5.2 Grouped length of stay

There are limitations to average and median figures as they can hide differences in behaviour. The analysis below shows length of stay as grouped days.

Days by source market

There are no significant differences by source market except for Fiji. Over half (56%) of visitors from Fiji stay for 1 to 5 days

Table 6: Q5 Length of stay (grouped days) by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
1 to 5	32	48	23	22	25	0	20
6 to 10	32	23	44	32	40	100	28
11 to 20	22	14	28	25	30	0	25
20 to 50	9	10	3	16	5	0	10
50 to 100	3	5	2	3	0	0	3
> 100	2	1	0	3	0	0	15

Base: all visitors

Almost half (48%) of those travelling for business/conference stay for 1 to 5 days. Those traveling for holiday/vacation are more likely (44%) to stay for 6 to 10 days. Those visiting friends or relatives are more likely to stay for 20 to 50 days (16%).

⁴ The median is the value separating the higher half of a data sample, a population, or a probability distribution, from the lower half. In simple terms, it may be thought of as the "middle" value of a data set. For example, in the data set {1, 3, 3, 6, 7, 8, 9}, the median is 6, the fourth number in the sample. The median is a commonly used measure of the properties of a data set in statistics and probability theory.

Table 7: Q5 Length of stay (grouped) by Province visited

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
1 to 5	32	34	5	5	9	0	4
6 to 10	32	30	53	34	48	33	25
11 to 20	22	21	26	41	27	37	39
20 to 50	9	10	16	14	6	19	25
50 to 100	3	3	0	5	6	11	4
> 100	2	2	0	2	3	0	4

Base: all research participants

Visitors to Honiara are more likely to spend 1 to 5 days in Solomon Islands (34%). Visitors to Western Province are more likely to spend 11 to 20 days (41%), Central Province 6 to 10 days (48%) and Malaita 11 to 20 days (37%).

5.6 Previous visits and first time visits

5.6.1 First time or previously visited Solomon Islands

Around half (51%) of all visitors have come to Solomon Islands previously while forty-nine percent (49%) were making their first visit.

Table 8: Q6 Previous visits by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
First visit	49	44	42	44	64	63	96	21	70	100
Previous visits	51	56	58	56	36	37	4	79	30	0

Base: all visitors

Those from other Pacific Islands are more likely to have visited previously (79%). First time visitors are most likely to come from Continental Europe (96%).

Table 9: Q6 First time visits by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
First visit	49	35	80	42	35	50	33
Previous visits	51	65	20	58	65	50	68

Base: all visitors

Those visiting for holiday/vacation are most likely to be visiting for the first time (80%). Though of this group twenty percent (20%) have previously visited Solomon Islands.

Business/conference visitors are likely to have made previous visits (65%).

Table 10: Q6 First time visits by Province visited

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
First visit	49	47	74	66	79	52	64
Previous visits	51	53	26	34	21	48	36

Base: all visitors

First time visitors are most likely to visit:

- Other areas of Guadalcanal 74%
- Central Province 79%
- Western Province 66%

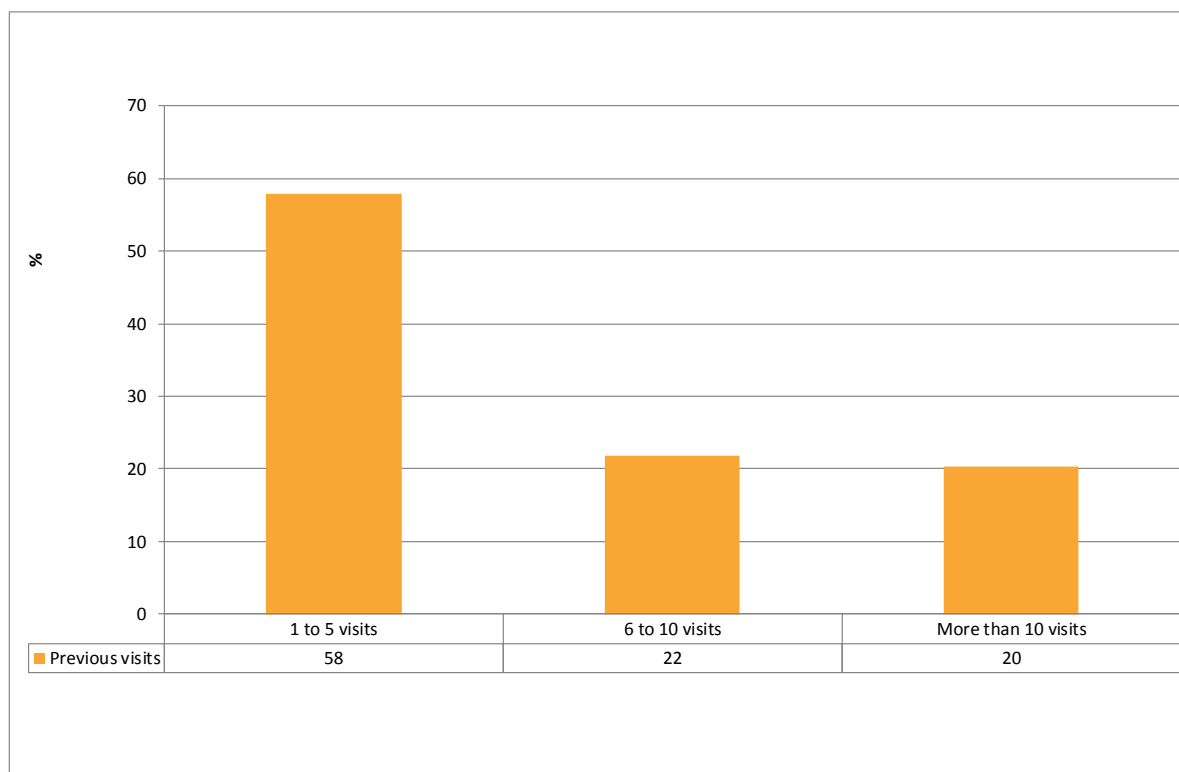
5.6.2 Previous visits to Solomon Islands

The average number of previous visits is 10.3 times, but this has the same issues as average length of stay. The median number of previous visits is 4. The average figure is skewed by a small number ($n=3$) of people who have made over 100 visits.

A better way to understand previous visits is grouping, shown below.

Chart 5: Q7 Previous visits (grouped)

Base: 202



Base: previous visitors

Just over half (58%) of previous visitors have come to Solomon Islands between 1 and 5 times, around one-fifth (22%) have come between 6 to 10 times and a similar number (20%) have come more than 10 times.

Table 11: Q7 Previous visits (grouped) by source market

Base: 202

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK
1 to 5 visits	58	62	29	50	70	80	100	64	67
6 to 10 visits	22	15	43	33	10	10	0	36	33
More than 10 visits	20	23	29	17	20	10	0	0	0

Base: previous visitors

Previous visitors from New Zealand are more likely (43%) to have previously visited 6 to 10 times.

Table 12: Q7 Previous visitors (grouped) by main reason for visiting

Base: 202

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
1 to 5 visits	58	51	83	63	54	0	62
6 to 10 visits	22	23	9	18	38	100	23
More than 10 visits	20	26	9	20	8	0	15

Base: previous visitors

Previous visitors who have come for holiday/vacation are more likely to make 1 to 5 visits (83%).

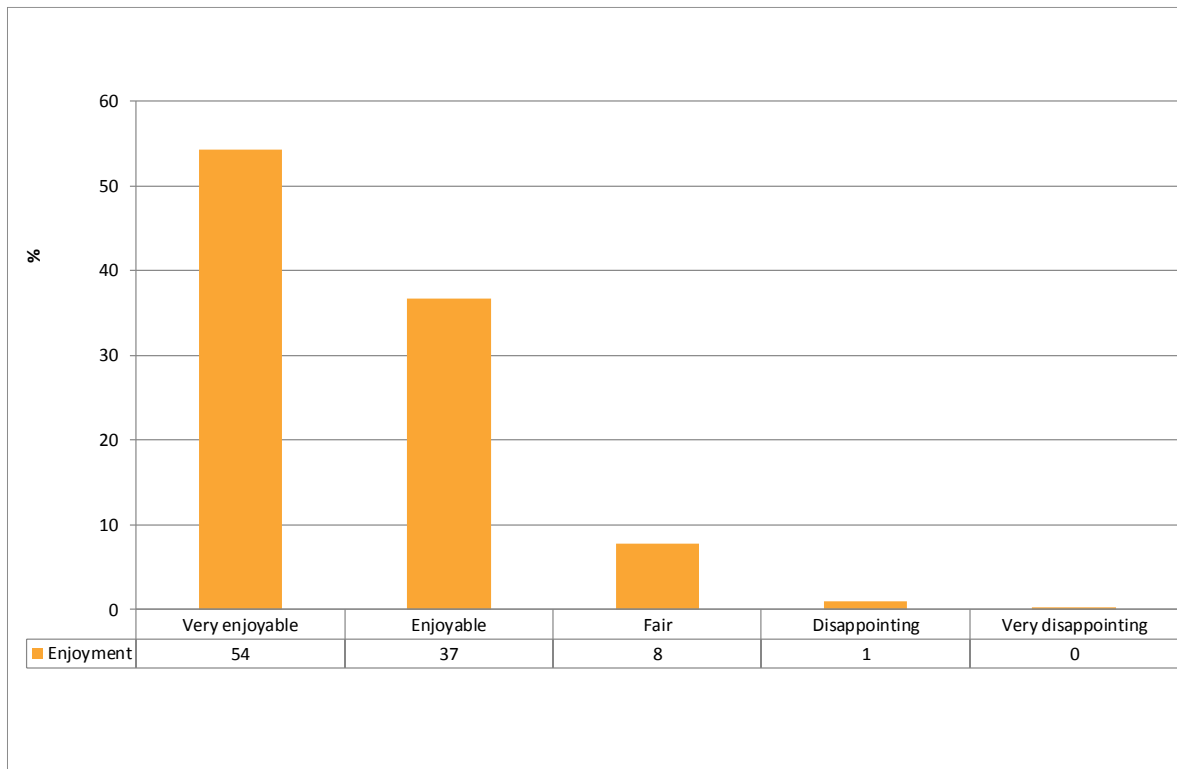
Previous visits by Province

There are no significant differences in previous visitors by Province visited.

5.7 Visit rating

Chart 6: Q39 How rated visit

Base: 400



Base: all visitors

Almost no visitors found their Solomon Islands experience disappointing. A combined ninety-one percent (91%) found it either 'very enjoyable' or 'enjoyable'.

Table 13: Q39 How rated visit by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Very enjoyable	54	58	50	38	82	44	57	21	50	0
Enjoyable	37	34	40	47	14	44	30	58	50	100
Fair	8	6	8	9	4	11	13	21	0	0
Disappointing	1	0	2	6	0	0	0	0	0	0
Very disappointing	0	0	0	0	0	0	0	0	0	0

Base: all visitors

- USA/Canada were most likely to rate their visit as 'very enjoyable' 82%
- Fiji are less likely to find their visit 'very enjoyable' 38%

Table 14: Q39 How rated visit by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Very enjoyable	54	38	66	65	75	100	50
Enjoyable	37	49	26	30	25	0	40
Fair	8	11	7	3	0	0	10
Disappointing	1	2	0	1	0	0	0
Very disappointing	0	0	1	0	0	0	0

Based: all visitors

There are differences in visit satisfaction by main reason for visit.

- Business/conference less likely to find visit 'very enjoyable' 38%
- Holiday/vacation more likely to find visit 'very enjoyable' 66%
- Visiting friends or relatives more likely to find visit 'very enjoyable' 65%

Table 15: Q39 How rated visit by Province

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Very enjoyable	54	53	63	73	73	70	68
Enjoyable	37	38	37	24	24	30	29
Fair	8	8	0	2	3	0	4
Disappointing	1	1	0	0	0	0	0
Very disappointing	0	0	0	1	0	0	0

Base: all visitors

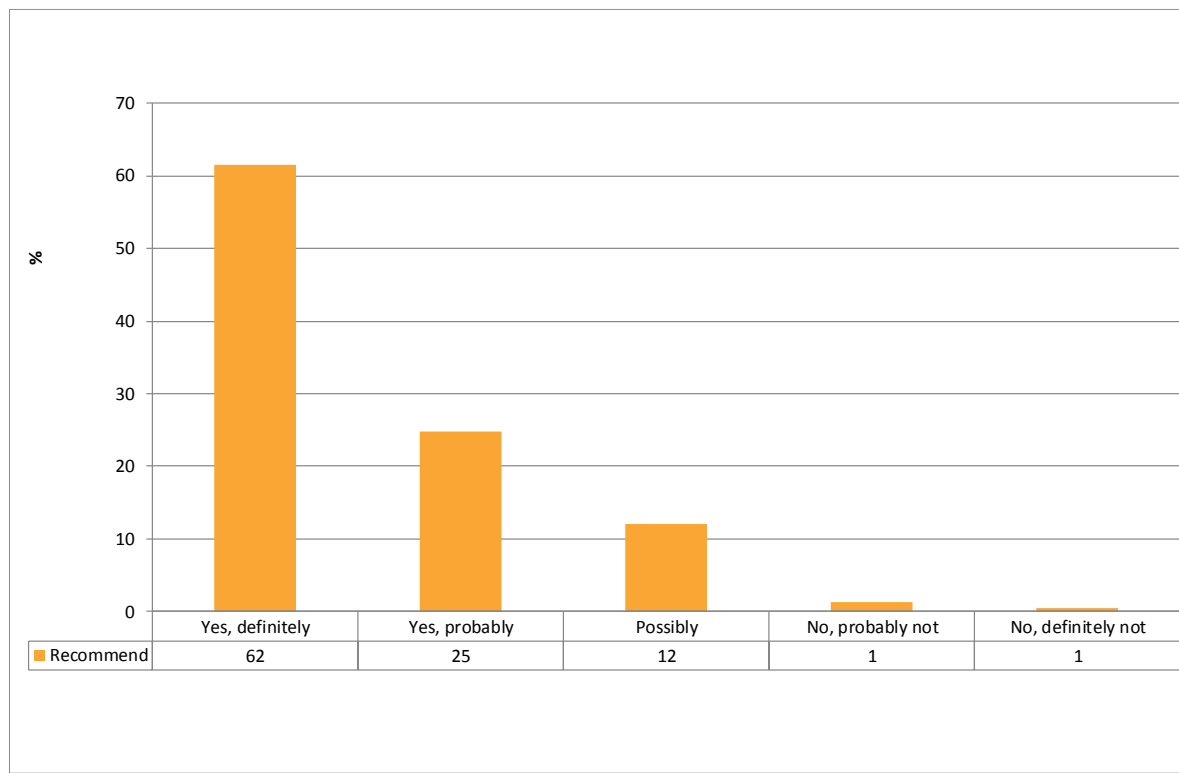
There are differences in visitor satisfaction by Province:

- Honiara are less likely to find visit 'very enjoyable' 53%
- Western Province visitors are more likely to find their visit 'very enjoyable' 73%
- Central Province visitors are more likely to find their visit 'very enjoyable' 73%

5.8 Recommend Solomon Islands to others

Chart 7: Q40 Recommend Solomon Islands to others

Base: 400



Base: all visitors

The full text of this question was 'would you recommend Solomon Islands to friends, relatives or colleagues at home?'

Almost all (86%) would either 'definitely' or 'probably' recommend visiting Solomon Islands to others.

Differences by source market

There are no significant differences by visitor source market.

Table 16: Q40 Recommend Solomon Islands to others

Base: 400

	NET	Business/ Conference	Holiday/ Leisure/ Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Yes, definitely	62	52	69	64	80	100	60
Yes, probably	25	29	20	28	20	0	20
Possibly	12	16	10	9	0	0	13
No, probably not	1	1	1	0	0	0	5
No, definitely not	1	1	0	0	0	0	3

Base: all visitors

Those visiting for business/conference are less likely to ‘definitely’ recommend Solomon Islands (52%). Those visiting for holiday/vacation are more likely to ‘definitely’ recommend Solomon Islands (69%).

Table 17: Q40 Recommend Solomon Islands to others by Province

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Yes, definitely	62	60	63	70	73	67	64
Yes, probably	25	26	26	23	24	26	32
Possibly	12	12	11	6	3	7	4
No, probably not	1	1	0	1	0	0	0
No, definitely not	1	1	0	0	0	0	0

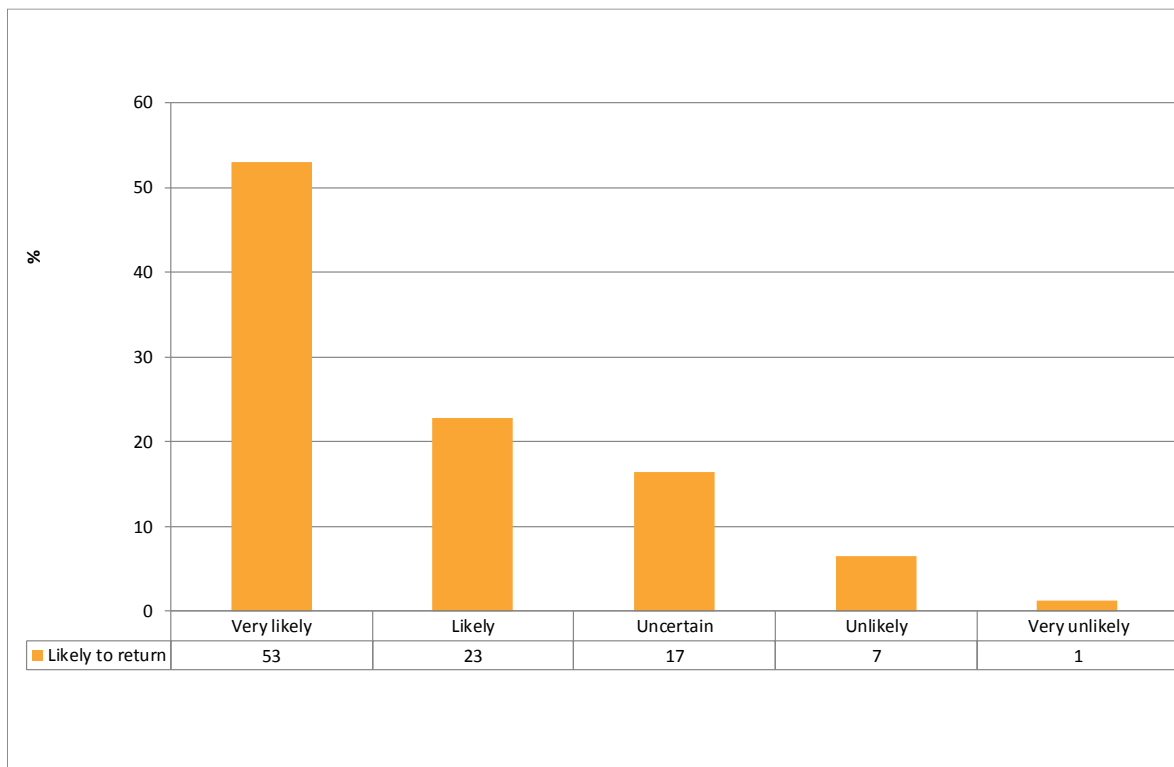
Base: all visitors

Those who visited Honiara are less likely to ‘definitely’ recommend Solomon Islands to others (60%).

5.9 How likely to return in next 5 years

Chart 8: Q41 How likely to return in next 5 years

Base: 400



Base: all visitors

Over three-quarters (76%) of visitors say they are either 'very likely' or 'likely' to return in the next 5 years. Of this group over half (53%) are 'very likely'.

Table 18: Q41 How likely to return in next 5 years by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Very likely	53	59	46	66	32	37	26	74	40	0
Likely	23	20	35	22	14	33	26	21	10	100
Uncertain	17	14	15	13	32	22	26	5	40	0
Unlikely	7	7	4	0	18	7	9	0	10	0
Very unlikely	1	0	0	0	4	0	13	0	0	0

Base: all visitors

Differences by source market are:

- Australia the most likely to return; 'very likely' 59%
- Long-haul markets are less likely to return
 - USA/Canada 'very likely' 32%
 - Continental Europe 'very likely' 26%

Table 19: Q41 How likely to return in next 5 years by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Very likely	53	58	34	65	75	100	53
Likely	23	23	27	14	15	0	30
Uncertain	17	12	28	10	10	0	13
Unlikely	7	6	9	7	0	0	5
Very unlikely	1	1	2	3	0	0	0

Base: 400

Differences by main reason for visiting are:

- Holiday/vacation less likely to return; 'very likely' 34%
- More likely to return are
 - Visiting friends or relatives 65%
 - Religion 75%

The lower level of intent to return in holiday/vacation visitors is not necessarily an issue as this will include those from long-haul source markets who are unlikely to visit the region again in this timeframe.

Table 20: Q41 How likely to return by Province visited

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Very likely	53	54	47	43	27	41	64
Likely	23	23	21	23	33	33	25
Uncertain	17	16	11	28	18	22	7
Unlikely	7	6	16	3	15	0	0
Very unlikely	1	1	5	2	6	4	4

Base: all visitors

Differences by Province are:

- Visitors less likely to return to:
 - Western Province 'very likely' 43%
 - Central Province 'very likely' 27%

These differences are explained by holiday/vacation visitors, especially those from long-haul source markets being less likely to return.

5.11 Worst experiences or disappointments

Table 22: Q43 Worst experiences or disappointments

Base: 400

	%
Nothing / no comment	53
Pollution / rubbish / betel nut	10
Expensive	7
Other	7
Traffic Jams	7
Safety / security issues	6
Weather	4
Road conditions	4
Mosquitos, insects, vermin	3
Delayed or cancelled flights	3
Standard of Accommodation	3
Airport	2
Customer Service	2

Base: all visitors

Over half of all visitors (53%) could not think of any poor experience or disappointment. The table above shows coded verbatim answers.

The data shows that there is no significant issue that is a consistent problem. Further analysis shows that there is no meaningful difference by:

- First time / previous visitors
- Source market
- Main reason for visit
- Province visited

6 EXPENDITURE

6.1 Overview

In this report we have used the measure of average spend per visit to calculate total estimated spend. In the SPTO IVS report total estimated spend was not calculated and spend per-person per-day was used. The SPTO IVS Report did not estimate total spend in Solomon Islands.

The problem with a per-person per-day spend is that to make an estimate of total visitor spend you need to include an estimate of total visitor nights in Solomon Islands. As discussed in Section 5.5.1 the skewed distribution of visitor nights in the sample makes using the average, median or trimmed average problematic, with large differences in visitor nights multiplying visitors by each of these measures of days in Solomon Islands.

Calculation by per-person per-visit does not require visitor nights in the calculation so is a more reliable way of projecting data. Additionally per-visit spend is a better reflection of differences between groups.

The method of calculation of per-person per-visit spend is:

- Calculate visitor spend made up of
 - Package
 - Retention rate of 31%
 - Pre-paid
 - Retention rate of 73% for travel agent bookings
 - Retention rate of 80% of online aggregator bookings
 - All revenue recorded for Solomon Islands for direct or 'other' bookings
 - Average spend per group in Solomon Islands
- Divide each by the number of people travelling sharing the same expenditure
 - Per-person per-visit spend
- Multiply the result by visitor arrival data

For comparison with SPTO IVS data we have included the per-person per-day spend.

6.2 What is retention?

When a visitor makes a booking for travel to Solomon Islands not all the spend may be in the country. Packages will include international airfares and commissions. Travel agent bookings include commission and online aggregator bookings also include commissions.

To show the value of visitors to Solomon Islands we need to remove the spend that is part of travel but not delivered to Solomon Islands. We have used a retention rate of 31% of each dollar for packages. This is based on Australia with a retention rate of 30% and Fiji with a retention rate of 31%. Travel agent commissions and fees are 27% and online aggregators have a commission of between 15% and 25%, so we have chosen 20% for this group.

6.3 Currency

All amounts are in Solomon Island dollars. Where spend was recorded in another currency this was converted to \$SI at the exchange rate in November 2016.

6.4 Estimated spend per-person per-day

Table 25: Per-person per-day spend

Base: 399

	Spend
Package	\$62
Accommodation	\$644
Transfers	\$76
Activities	\$32
Food and drinks	\$262
Internal transport	\$86
Organised tours	\$12
Other leisure	\$5
Shopping	\$46
Other areas	\$268
Total	\$1,494

Base: all visitors with recorded nights

To allow comparison to the SPTO IVS in February we have calculated per-person per-day spend.

In 2013 this was estimated as \$1,410 compared to \$1,493 in 2016.

6.5 Estimated total revenue

Table 26: Estimated total revenue 2016

	Total spend
Package	\$11,240,228
Accommodation	\$100,558,567
Transfers	\$5,673,613
Activities	\$6,990,015
Food and drinks	\$58,459,918
Internal transport	\$17,850,212
Organised tours	\$3,116,623
Other lesisure	\$1,413,700
Shopping	\$9,575,426
Other areas	\$18,590,744
Total	\$233,469,046

Base: all visitors with recorded nights

In 2016 there is an estimated spend of \$233,469,046 from visitors. Almost half of this (\$100 million) is in accommodation. Accommodation may include some meals.

6.6 Estimated spend by source market

Table 27: Estimated revenue by source market

Base: 399

	Total
Australia	\$105,288,574
New Zealand	\$28,134,958
UK	\$27,100,633
USA / Canada	\$18,858,465
Fiji	\$16,965,526
Continental Europe	\$15,715,369
Pacific Islands	\$12,362,293
Asia	\$9,039,043
Other	\$16,801
NET	\$233,469,046

Base: all those who spent nights in Solomon Islands

Text below rounds figures to the nearest million dollars

Australia is the source market with the highest spend in Solomon Islands for \$105 million. New Zealand (\$28 million) and United Kingdom (\$27 million) are similar in spend while USA/Canada is also high with \$19 million.

Fiji is the only significant Pacific Island with spend of \$17 million. All other Pacific Islands combined are \$12 million.

6.7 Estimated spend by main reason for visit

Table 28: Estimated spend by main reasons for visit

Base: 399

	Total
Business/ Conference	\$87,950,166
Holiday/ Leisure/ Recreation	\$62,381,838
Other	\$46,532,274
Visiting Friends or Relatives	\$29,027,270
Religion	\$7,210,153
Wedding	\$369,479
NET	\$233,469,046

Base: all those who spent nights in Solomon Islands

Text below rounds figures to the nearest million dollars

Revenue from business/conference is the highest for main reason (\$88 million) while holiday/vacation is second highest with \$62 million.

The 'other' category is the third highest spend with \$47 million. This group is made up of a small number of long-term visitors including:

- Education/training/research
- Working
- Volunteering

Visiting friends or relatives contributes \$29 million to the economy. This group also stays longer than business/conference and holiday/vacation visitors.

6.8 Estimated spend by Province

Table 29: Estimated spend by Province

Base: 399

	Total
Honiara	\$158,892,286
Other Guadalcanal	\$4,054,746
Western	\$37,105,649
Central	\$15,141,296
Malaita	\$8,154,227
Other	\$9,902,060
NET	\$234,482,029

Base: all those who spent nights in Solomon Islands

Text below rounds figures to the nearest million dollars

Spend by Province required additional work. On average visitors travel to 1.42 different Provinces. This is due to the need to stay in Honiara prior to travel to another region. Ninety-two percent (92%) of visitors have one or more nights in Honiara.

Spend can only be allocated to one Province so the approach used has been to assign each research participant to the Province where they spent the most nights. This means that some of the spend in, for example Western Province will be in Honiara. Perhaps a more clear way of thinking about this data is that it is spend by 'destination in Solomon Islands'.

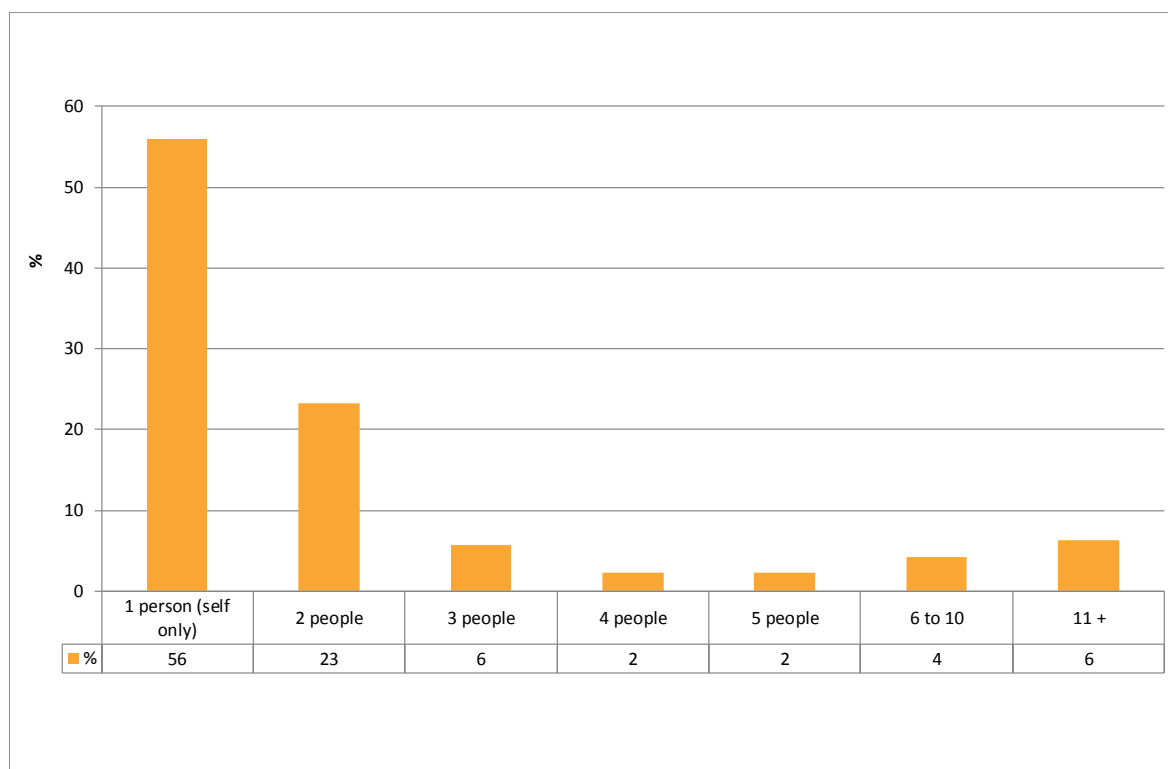
The work carried out to assign research participants also creates some small distortions in calculation so the total spend (NET) is not identical to the other analysis. This is an unavoidable outcome of the process of assigning Provinces.

Given the number of visitors to Honiara it is not surprising that spend in the capital is the highest with \$159 million. Other areas of Guadalcanal are \$4 million making a total of \$163 million for the Province. Western Province spend is \$37 million, Central Province \$15 million, Malaita Province \$8 million and all other Provinces combined \$10 million.

6.9 Number of people in group sharing expenditure

Chart 9: Q1 Number of people sharing expenditure

Base: 400



Base: all visitors

Over half (56%) did not share expenses with other people. Just over one-fifth (23%) are two people sharing expenses.

This question is not the same as travel party, but most people travelling together can be assumed to be sharing expenses. Solomon Islands has many visitors travelling on their own.

On average the group sharing expenses was 2.7 people. This is higher than the data above would suggest and comes from the relatively small number of people in sharing expenses with five or more others.

Four hundred ($n=400$) people were interviewed as in the research and they represent the spend and behaviour of a total of 1,082 individuals.

Table 30: Q1 Average number sharing expenses by source market**Base: 400**

Average	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
# sharing expenses	2.7	2.7	1.8	2.3	5.6	3.4	1.6	2.3	1.4	1.0

Base: all visitors

Groups sharing expenses are higher for those from USA/Canada (5.6) and lower for those from New Zealand (1.8), Continental Europe (1.6) and United Kingdom (1.4).

Table 31: Q1 Average number sharing expenses by main reason for visit**Base: 400**

Average	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
# sharing expenses	2.7	1.5	4.0	2.1	6.0	8.5	2.7

Base: all visitors

Groups sharing expenses are higher for those on holiday/vacation (4) and weddings (8.5) and lower for those visiting for business/conference (1.5) and visiting friends or relatives (2.1).

Table 32: Q1 Average number sharing expenses by Province**Base: 400**

Average	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
# sharing expenses	2.7	2.5	2.5	3.3	5.3	3.7	3.1

Base: all visitors

Groups sharing expenses are higher for visitors to Central Province (5.3) and lower for Honiara (2.5).

7 VISITOR DEMOGRAPHICS

7.1 Overview

Gender and age were asked as to the number of people who were male and female in each travelling group, and the same question for age groups. They are shown as ‘percent responses’ (see definitions and calculations) which is a statistical approach that means proportions are represented as one person per interview.

This approach means that children are included in the data and the results can be projected to all visitors.

7.2 Gender

Fifty-nine percent (59%) of visitors were men and (41%) were women.

Table 33: Q2 Gender by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Males	59	56	68	67	54	61	65	80	57	100
Females	41	44	32	33	46	39	35	20	43	0

Base: all visitors

Gender for USA/Canada is close to an even split between men (54%) and women (46%). Pacific Island visitors are more likely to be men (80%).

Table 34: Q2 Gender by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Males	59	77	54	53	56	47	55
Females	41	23	46	47	44	53	45

Base: all visitors

Men are more likely than women to visit for business/conference (77%).

Table 35: Q2 Gender by Province visited

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Males	59	59	46	59	42	54	52
Females	41	41	54	41	58	46	48

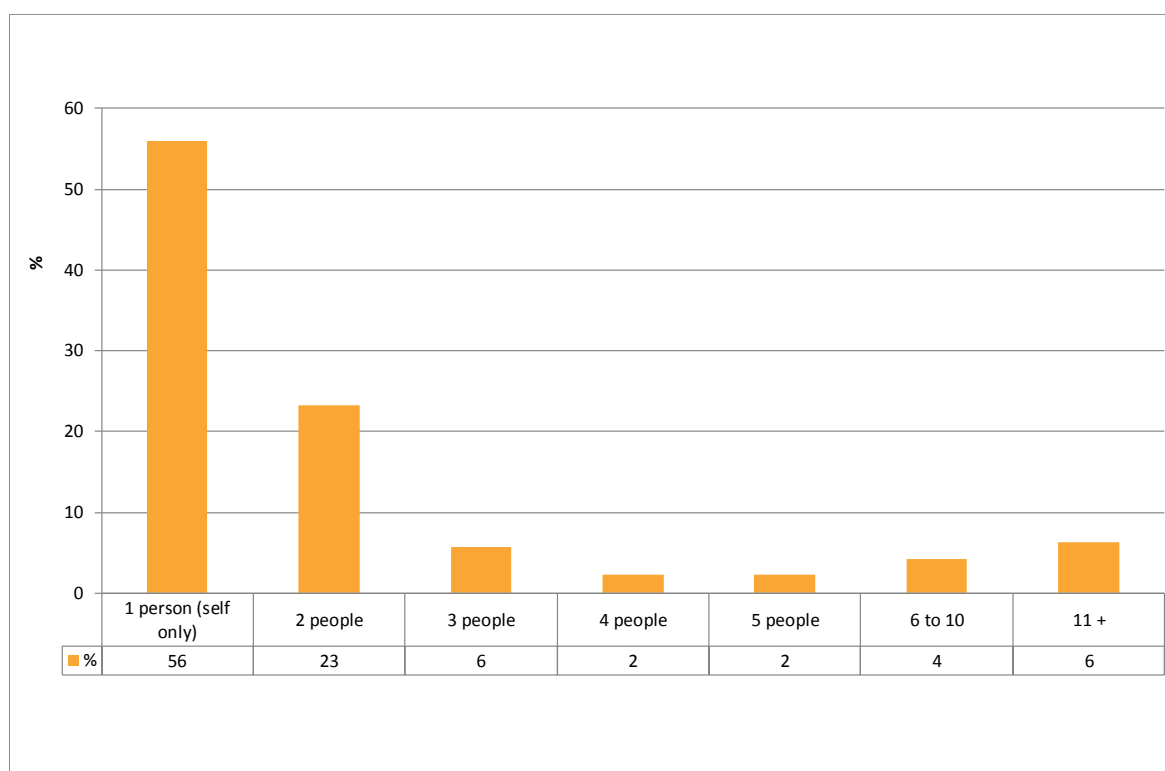
Base: all visitors

Men are more likely to visit Honiara (59%) while women are more likely to visit Central Province (58%).

7.3 Age of visitors

Chart 10: Q3 Age of visitors

Base: 400



Base: all visitors

There are few visitors 18 years or younger (7%). Over one-third are aged 19 to 44 years (38%), forty-one percent (41%) 45 to 64 years and fifteen percent (15%) 65 years and over.

Table 36: Q3 Visitor age by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
0 to 18 years	7	12	0	0	1	2	3	0	0	0
19 to 44 years	38	37	43	46	9	63	64	38	43	100
45 to 64 years	41	41	42	47	40	32	15	62	29	0
65 years or older	15	11	15	7	51	3	18	0	29	0

Base: all visitors

Visitors under 19 years are most likely to come from Australia (12%).

Visitors 65 years and older make up over half of all visitors from USA/Canada (51%).

Table 37: Q3 Age of visitor by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
0 to 18 years	7	2	7	7	7	13	14
19 to 44 years	38	48	35	26	36	80	36
45 to 64 years	41	42	35	52	47	7	43
65 years or older	15	9	23	15	9	0	7

Base: all visitors

- Visitors for business/conference are more likely to be aged 19 to 44 years (48%).
- Holiday/vacation visitors are more likely to be aged 65 years and over (23%)
- Visitors for a wedding are much more likely to be aged 19 to 44 years (80%)

Visitor age by Province visited

There are no significant differences in the age of visitors by Province visited.

7.4 Source market

7.4.1 Individual source markets

Table 38: Q8 Country of origin (full)

Base: 400

	%		%
Australia	53	Japan	1
New Zealand	12	Taiwan	1
Fiji	8	Malaysia	1
USA	6	Germany	1
UK	3	Indonesia	1
Asia	2	Samoa	1
Vanuatu	2	Tuvalu	0
Switzerland	1	Sweden	0
Other Pacific	1	New Caledonia	0
Italy	1	Norway	0
Canada	1	Vietnam	0
Spain	1	Poland	0
Papua New Guinea	1	Korea	0
Netherlands	1	Tonga	0
Philippines	1	Chile	0
China	1	Denmark	0
Singapore	1	France	0
India	1		

Base: all visitors

Visitors come from a wide range of countries. In the table above those showing as zero percent (0%) are one person from each country.

Just over half of all visitors (53%) come from Australia. Other key source markets for visitors are New Zealand (12%), Fiji (8%) and USA (6%).

7.4.2 Grouped source markets

Table 39: Q8 Source market (grouped)

Base: 400

	%
Australia	53
New Zealand	12
Fiji	8
USA / Canada	7
Asia	7
Continental Europe	6
Pacific Islands	5
UK	3
Other	0

Base: all visitors

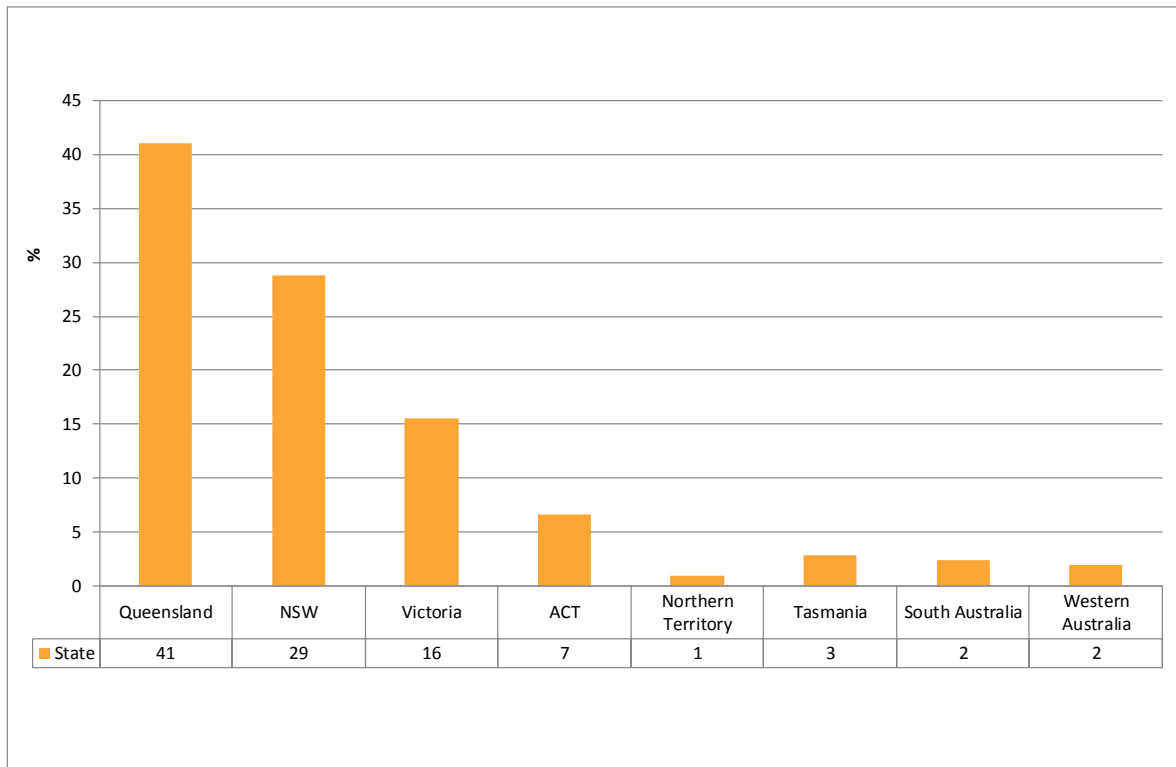
To make analysis manageable source markets have been grouped into the categories shown in the table above. This is the standard analysis used in the report.

In this analysis, the six percent (6%) from USA are combined with the one percent (1%) from Canada as USA/Canada.

7.4.3 Australian visitors

Chart 11: Q9 Source of Australian visitors

Base: 212



Base: visitors from Australia

Australian residents make up 53% of visitors. Of this group, forty-one percent (41%) come from Queensland, twenty-nine percent (29%) come from NSW and sixteen percent (16%) from Victoria. Together these three states make up eighty-five percent (85%) of visitors from Australia.

7.4.4 USA visitors

Table 40: Q10 Source of USA visitors

Base: 12

	Region	State
Hawaii	West	17
California	West	13
Texas	West	13
Washington	East	13
Nevada	West	8
Arizona	West	4
Montana	Central	4
New Jersey	East	4
New Mexico	West	4
New York	East	4
Ohio	East	4
Oklahoma	Central	4
Pennsylvania	East	4
Virginia	East	4

Base: USA visitors. Note small base size of $n=21$

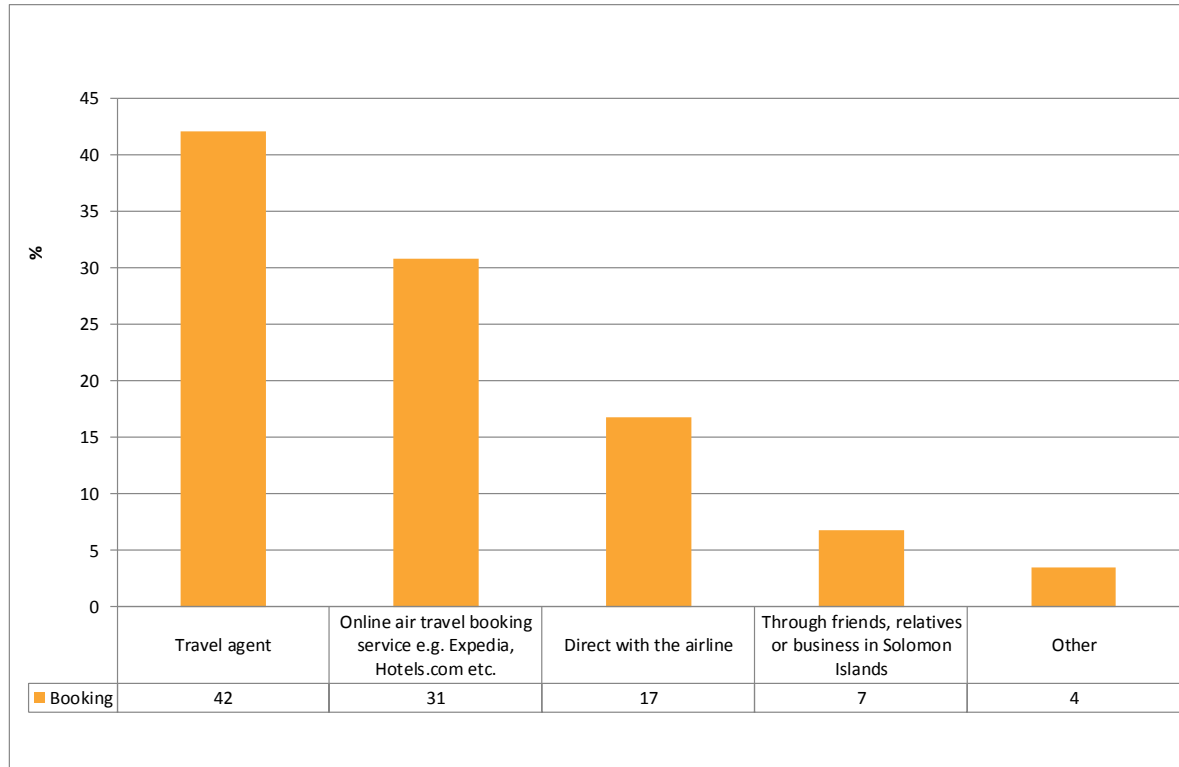
Visitors from USA can come from across the country, though using an arbitrary classification of States into West, Central and East zones show that over half (59%) come from the West and one-third (33%) come from the East.

8 TRAVEL AND ACCOMMODATION

8.1 Method of booking air travel

Chart 12: Q21 Method of booking air travel

Base: 400



Base: all visitors

The most common form of booking air travel is through a travel agent (42%). However alternative methods are also frequently used. Just under one-third (31%) used an online travel booking service (travel aggregator) while seventeen percent (17%) booked directly with an airline.

While travel agents are the most used for booking, Solomon Islands air booking is frequently self-booked with forty-eight percent (48%) using online aggregators or direct bookings with airlines.

Table 42: Q21 Method of booking air travel by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Travel agent	42	54	37	20	30	50	55
Online air travel booking service e.g. Expedia, Hotels.com etc.	31	24	30	57	35	50	13
Direct with the airline	17	9	27	17	25	0	13
Through friends, relatives or business in Solomon Islands	7	10	2	4	5	0	15
Other	4	4	3	1	5	0	5

Base: all visitors

The expectation may be that travel agents are more likely to be used for holiday/vacation, but for Solomon Islands this is not the case. Fifty-four percent (54%) of business/conference visitors use a travel agent for airline bookings compared to thirty-seven percent (37%) of holiday/vacation visitors. This group is more likely to book direct with the airline (27%) than other visitors.

Those visiting friends or relatives are more likely to use an online booking aggregator (57%).

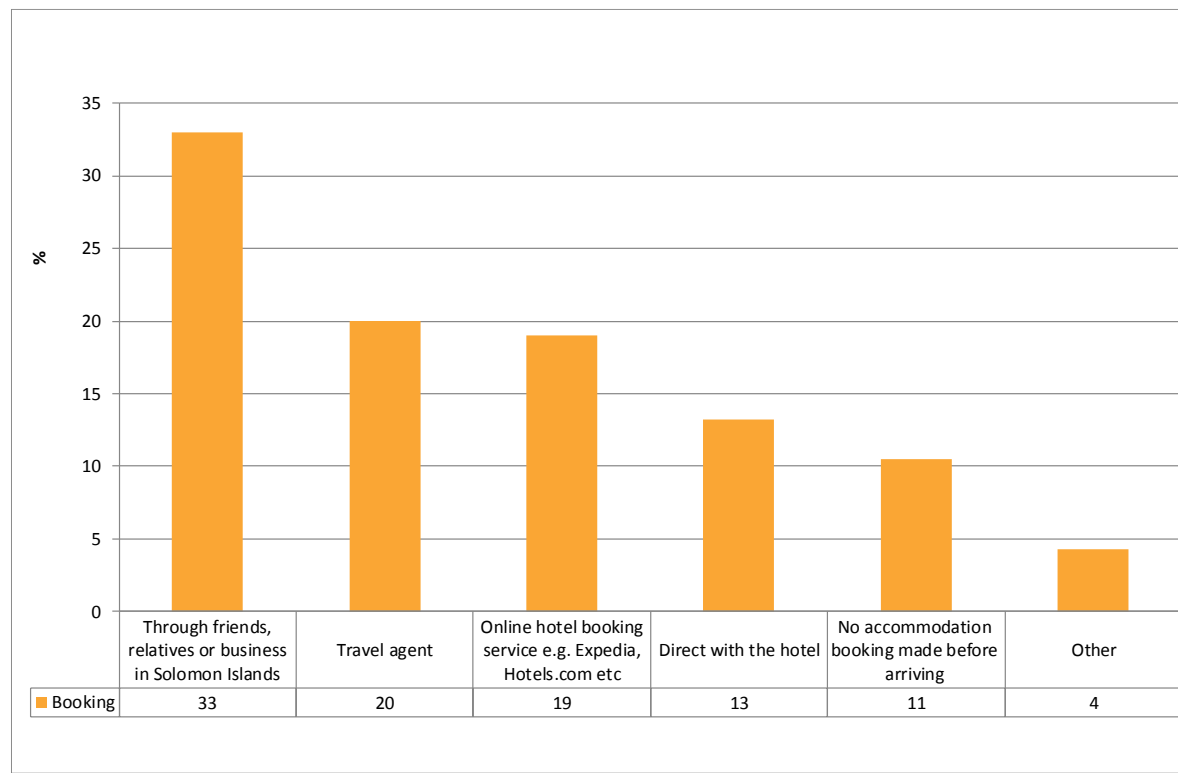
Air travel booking by source market and Province visited

There are no meaningful differences in air travel booking by source market or Province visited.

8.2 Method of booking accommodation

Chart 13: Q22 Method of booking accommodation

Base: 400



Base: all visitors

The most common way of a booking being made is through friends, relatives or business living in Solomon Islands (33%). Only one-in-five (20%) use a travel agent. A similar number (19%) use an online aggregator and thirteen percent (13%) book direct with a hotel.

Direct bookings with a hotel could be online, email or phone.

Table 43: Q22 Method of booking accommodation by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Through friends, relatives or business in Solomon Islands	33	38	16	41	55	100	35
Travel agent	20	24	28	3	5	0	23
Online hotel booking service e.g. Expedia, Hotels.com etc.	19	14	30	14	15	0	15
Direct with the hotel	13	18	15	4	0	0	15
No accommodation booking made before arriving	11	3	6	35	15	0	8
Other	4	3	5	3	10	0	5

Base: all visitors

The most interesting finding in this analysis is how visitors for holiday/vacation book accommodation. Thirty percent (30%) use an online travel aggregator while twenty-eight percent (28%) use a travel agent. Fifteen percent (15%) book direct with a hotel.

In most destinations use of travel agents is much higher. The findings speak to the type of holiday/vacation visitor who chooses Solomon Islands. It also shows that travel agents are an important booking source for accommodation, but so is listing with online aggregators.

9 TRAVEL TO SOLOMON ISLANDS

9.1 Holiday/vacation travel behaviour

9.1.1 Visiting other destinations on trip

Only holiday/vacation visitors were asked about other destinations on their trip.

Just over one-third (37%) of visitors are visiting other destinations as part of their visit to Solomon Islands.

Table 44: Q16 Visiting other countries by source market

Base: 116

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK
Yes, other destinations	37	10	44	0	63	56	82	67	100
No other destinations	63	90	56	100	38	44	18	33	0

Base: holiday/vacation visitors

'Long-haul' visitors from USA/Canada (63%) and Continental Europe (82%) are most likely to be visiting other countries. Because of the low base size of UK holiday/vacation visitors ($n=2$) they do not show as statistically significant, but it can be assumed that as a group they are similar to Continental Europe.

Holiday/vacation visitors from Australia are the most likely to visit only Solomon Islands (90%).

There are no significant differences by Province.

9.1.2 Other Pacific destinations

Table 45: Q17 Other Pacific destinations visiting on trip

Base: 43

	Other Pacific countries
Fiji	53
Vanuatu	53
Papua New Guinea	26
New Caledonia	23
Palau	21
Tonga	21
Other	21
Samoa	19
Guam	14
Australia	12
Nauru	9
French Polynesia	7
Kiribati	7
Philippines	7
American Samoa	5
Timor-Leste	5
Tuvalu	5
Marshall Islands	2
Micronesia	2
Niue	2

Base: holiday/vacation visitors also visiting other counties on trip

The two most popular counties to visit when traveling to other destinations are Fiji (53%) and Vanuatu (53%). However this misses that for this cohort of visitors many other destinations are visited.

On average, for this group 3.14 other countries are visited. This shows that for around one-third of holiday/vacation visitors, Solomon Islands is part of a much larger tour. The small base size for this group ($n=43$) makes analysis unreliable, but the data shows that those from USA/Canada visit an average of 4.4 other counties and are the most likely to visit other destinations.

9.2 What attracted visitors

Table 46: Q19 What attracted visitors before arrival

Base: 116

	Attraction for visiting
Culture	40
Activities	32
Friendly people	31
Curiosity	30
Scenery	28
Beaches	25
Climate	23
Snorkelling / diving	16
Tranquillity	15
Diversity of attractions	9
Friends Family	6
Value for money	5
History	3
Re-visit	3
Mission work	2
Other	4

Base: holiday/vacation visitors

This question is only asked of those visiting for a holiday/vacation.

The key attractions of Solomon Islands for visitors are:

- Culture 40%
- Activities 32%
- Friendly people 31%
- Curiosity 30%
- Scenery 28%
- Beaches 25%

Analysis by first time and previous visitors shows there are no statistically significant differences in attractions for each of these groups.

Table 47: Q19 What attracted visitors before arrival by source market

Base: 116

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK
Culture	40	31	33	50	50	44	65	0	50
Activities	32	41	33	0	19	0	35	0	50
Friendly people	31	33	11	50	31	22	47	0	0
Curiosity	30	28	33	0	31	22	53	0	0
Scenery	28	33	22	0	13	22	35	33	50
Beaches	25	33	22	0	13	0	29	33	0
Climate	23	28	22	0	13	11	29	0	50
Snorkelling / diving	16	10	11	0	31	22	18	33	0
Tranquillity	15	19	11	0	13	0	18	0	0
Diversity of attractions	9	9	0	0	13	22	6	0	0
Friends Family	6	7	0	50	0	0	6	33	0
Value for money	5	5	0	0	13	0	6	0	0
History	3	2	11	0	6	0	6	0	0
Re-visit	3	3	0	0	6	0	0	0	0
Mission work	2	2	11	0	0	0	0	0	0
Other	4	7	11	0	0	0	0	0	0

Base: holiday/vacation visitors

There are some differences by source market that particularly affect visitors from Continental Europe. This group are much more likely to visit for ‘culture’ (65%) and ‘curiosity’ (53%).

Half (50%) of visitors from New Zealand come to see friends and family.

Table 48: Q19 What attracted visitors to Solomon Islands by Province

Base: 116

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Culture	40	39	40	40	33	50	40
Activities	32	29	30	46	39	25	30
Friendly people	31	31	20	28	39	25	40
Curiosity	30	32	20	26	17	25	10
Scenery	29	28	20	32	28	25	50
Beaches	25	24	10	26	28	25	40
Climate	23	23	20	28	22	0	30
Snorkelling / diving	15	10	30	18	39	0	20
Tranquillity	15	14	20	16	22	25	40
Diversity of attractions	9	9	20	14	17	0	20
Friends Family	6	8	0	8	6	25	0
Value for money	5	5	10	8	11	0	10
History	3	4	0	2	6	0	0
Re-visit	3	3	0	2	0	0	0
Mission work	2	2	0	2	0	13	0
Other	4	5	0	2	6	13	10

Base: holiday/vacation visitors

There are few differences by Province visited.

- Western Province is higher for 'activities' (46%)
- Central Province is higher for 'snorkelling/diving' (39%)

10 ACTIVITIES

10.1 Activities carried out

10.1.1 All activities

Table 49: Q24 Activities carried out in Solomon Islands

Base: 400

	%
Sightseeing / Cultural tours	40
Swimming/Snorkelling	36
Shopping	28
Historical / Archaeological sites	16
Hiking / Trekking	14
Nature / Landscape touring	14
Scuba diving	11
Diving	10
Fishing	10
Other	6
Sailing/Kayaking	6
Adventure sports	4
4x4 trails	2
Bird watching	2
Ballooning / Pleasure flights	0
No activities	24

Base: all visitors

Visitors carried out an average of 2 activities on their visit. This figure includes the quarter (25%) who carried out no activities.

Most popular activities are:

- Sightseeing / cultural tours 40%
- Swimming / snorkelling 36%
- Shopping 28%

Table 50: Q20 Activities carried out by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Sightseeing / Cultural tours	40	44	17	22	43	56	61	26	50	0
Swimming/Snorkelling	36	41	27	13	18	33	57	26	70	0
Shopping	28	28	13	22	43	19	30	58	30	0
Historical / Archaeological sites	16	16	15	3	32	19	26	5	10	0
Hiking / Trekking	14	14	13	6	18	15	35	5	10	0
Nature / Landscape touring	14	13	2	9	14	22	52	5	20	0
Scuba diving	11	10	10	3	18	15	17	5	20	0
Diving	10	9	17	9	11	11	9	5	10	0
Fishing	10	11	8	6	0	15	17	11	10	0
Other:	6	9	4	6	0	0	0	11	0	0
Sailing/Kayaking	6	9	0	3	0	0	13	0	10	0
Adventure sports	4	3	2	3	0	4	9	11	10	0
4x4 trails	2	3	0	3	0	4	0	0	0	0
Bird watching	2	2	2	0	4	4	4	0	10	0
Ballooning / Pleasure flights	0	0	0	0	0	0	0	0	0	0
No activities	24	24	40	34	18	19	0	16	20	100

Base: all visitors

Activities vary by source market:

- Australia visitors are more likely to go swimming / snorkelling 41%
- New Zealand visitors are more likely to carry out no activities 40%
- USA/Canada visitors are more likely to visit historical/archaeological sites 32%
- Continental Europe visitors are more likely to:
 - Sightseeing/cultural tours 61%
 - Swimming/snorkelling 57%
 - Hiking/trekking 35%
 - Nature/landscape touring 52%

Table 51: Q20 Activities carried out by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Sightseeing / Cultural tours	40	25	53	52	35	100	35
Swimming/Snorkelling	36	22	56	41	25	50	25
Shopping	28	23	28	32	65	0	20
Historical / Archaeological sites	16	8	29	16	0	50	13
Hiking / Trekking	14	6	24	14	15	0	18
Nature / Landscape touring	14	7	23	20	10	0	10
Scuba diving	11	3	28	1	5	50	8
Diving	10	7	17	10	0	0	10
Fishing	10	10	16	6	0	50	3
Other:	6	7	7	3	15	0	5
Sailing/Kayaking	6	3	12	6	5	0	0
Adventure sports	4	4	3	3	5	0	5
4x4 trails	2	2	3	1	0	0	3
Bird watching	2	1	5	1	0	0	3
Ballooning / Pleasure flights	0	0	1	0	0	0	0
No activities	24	41	4	17	15	0	33

Base: all visitors

Those visiting for holiday/vacation carry out an average of 3.09 activities, those visiting friends or relatives 2.07 activities and those visiting for business/conference 1.27 activities.

Top activities for those visiting for holiday/vacation are:

- Sightseeing/cultural tours 53%
- Swimming/snorkelling 56%
- Historical/archaeological sites 29%
- Hiking/trekking 24%
- Scuba diving 28%
- Nature/landscape touring 23%
- Diving 16%

The percentage of holiday/vacation visitors who scuba dive (28%) corresponds with the same number who visit with scuba diving as their main reason for a holiday/vacation (28%).

Those who visit for business/conference participate in fewer activities but due to their overall number of arrivals will carry out a significant number of activities.

Table 52: Q20 Activities by Province

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Sightseeing / Cultural tours	40	40	42	48	48	41	36
Swimming/Snorkelling	36	34	58	66	45	48	57
Shopping	28	28	47	24	39	37	43
Historical / Archaeological sites	16	15	37	23	24	19	21
Hiking / Trekking	14	13	21	25	24	30	25
Nature / Landscape touring	14	14	37	24	12	19	25
Scuba diving	11	9	16	32	48	4	14
Diving	10	9	11	19	21	7	7
Fishing	10	9	11	24	9	15	36
Other:	6	6	0	3	9	7	7
Sailing/Kayaking	6	5	16	19	6	4	11
Adventure sports	4	4	0	5	12	4	14
4x4 trails	2	2	5	1	3	4	0
Bird watching	2	2	0	8	6	4	11
Ballooning / Pleasure flights	0	0	0	0	0	0	4
No activities	24	25	16	9	0	19	7

Base: all visitors

Activities vary by Province.

Other areas of Guadalcanal are more likely to carry out

- Swimming/snorkelling 58%
- Historical/archaeologically sites 37%
- Nature/landscape touring 37%

Western Province are more likely to carry out:

- Swimming/snorkelling 66%
- Hiking/trekking 25%
- Nature/landscape touring 24%
- Scuba diving 32%
- Diving 19%
- Fishing 24%
- Sailing/kayaking 19%

Central Province are more likely to carry out:

- Scuba diving 48%
- Diving 21%

10.1.2 Main activity

Table 53: Q26 Main activity

Base: 400

	%
Swimming/Snorkelling	15
Sightseeing / Cultural tours	13
Scuba diving	10
Diving	3
Historical / Archaeological sites	3
Shopping	2
Hiking / Trekking	2
Fishing	1
Nature / Landscape touring	1
Bird watching	0
4x4 trails	0
Adventure sports	0
Ballooning / Pleasure flights	0
Sailing/Kayaking	0
Other:	5
No activities	0
None of these is my main activity	45

Base: all visitors

Just under half (45%) did not feel that any activity was their 'main activity'. For this group we can assume the range of activities in Solomon Islands is the attraction.

Fifteen percent (15%) stated swimming/snorkelling, thirteen percent (13%) sightseeing/cultural tours and ten percent (10%) scuba diving.

Table 54: Q26 Main activity by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Swimming/Snorkelling	15	6	22	18	6	0	19
Sightseeing / Cultural tours	13	10	22	9	18	0	0
Scuba diving	10	0	25	0	0	0	7
Diving	3	2	5	4	0	0	0
Historical / Archaeological sites	3	3	4	2	0	0	0
Shopping	2	3	1	2	0	0	0
Hiking / Trekking	2	2	2	2	0	0	0
Fishing	1	2	2	0	0	0	0
Nature / Landscape touring	1	0	0	5	0	0	0
Bird watching	0	0	1	0	0	0	0
4x4 trails	0	0	0	0	0	0	0
Adventure sports	0	0	0	0	0	0	0
Balloonning / Pleasure flights	0	0	0	0	0	0	0
Sailing/Kayaking	0	0	0	0	0	0	0
Other:	5	7	5	4	6	0	7
No activities	0	0	0	0	0	0	0
None of these is my main activity	45	64	13	56	71	100	67

Base: all visitors

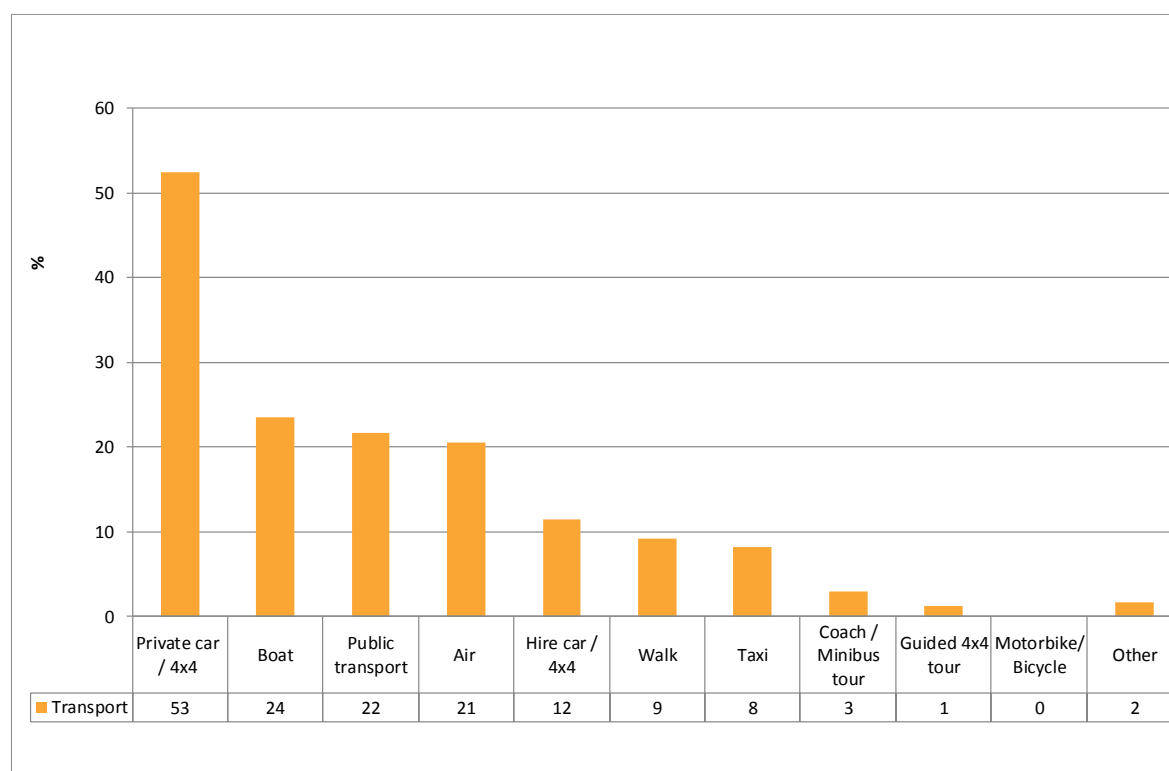
Those travelling for holiday/vacation are more likely to have a 'main activity'.

- Swimming/snorkelling 22%
- Sightseeing/cultural tours 22%
- Scuba diving 25%

10.2 Transport in Solomon Islands

Chart 14: Q27 Transport used

Base: 400



Base: all visitors

On average visitors used 1.53 different forms of transport. Air transport in this data is domestic only.

The main form of transport used is non-commercial; private car/4x4 (53%).

Other frequently used forms of transport are:

- Boat 24%
- Public transport 22%
- Air (domestic) 21%
- Hire car/4x4 12%

Table 55: Q27 Transport used by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Private car / 4x4	53	58	52	63	29	67	30	42	20	0
Boat	24	23	23	9	32	26	39	16	30	0
Public transport	22	25	13	22	14	22	26	21	20	0
Air	21	22	19	13	18	15	39	5	30	0
Hire car / 4x4	12	11	13	9	11	11	4	21	20	0
Walk	9	8	6	6	18	11	9	16	10	100
Taxi	8	8	8	6	21	4	9	5	10	0
Coach / Minibus tour	3	2	0	0	21	0	0	0	10	100
Guided 4x4 tour	1	0	0	0	4	7	4	0	0	0
Motorbike/Bicycle	0	0	0	0	0	0	0	0	0	0
Other	2	1	0	6	0	0	13	0	0	0

Base: all visitors

Differences by source market are:

- USA/Canada are more likely to use
 - Taxi 21%
 - Coach/minibus 21%
- Continental Europe are more likely to use
 - Air (domestic) 39%

Table 56: Q27 Transport used by main reason for visiting

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Private car / 4x4	53	55	28	78	80	50	55
Boat	24	10	41	23	30	50	20
Public transport	22	18	25	25	25	0	23
Air	21	12	34	17	5	50	28
Hire car / 4x4	12	16	11	3	20	0	8
Walk	9	9	6	7	5	0	25
Taxi	8	7	8	7	5	0	18
Coach / Minibus tour	3	1	6	1	5	0	5
Guided 4x4 tour	1	0	4	0	0	0	0
Motorbike/Bicycle	0	0	0	0	0	0	0
Other	2	2	2	1	5	0	0

Base: all visitors

Differences by main reason for visiting are:

- Holiday/vacation are more likely to use
 - Boat 41%
 - Air (domestic) 34%
- Visiting friends or relatives are more likely to use
 - Private car/4x4 78%
- Religion are more likely to use
 - Private car/4x4 80%

Table 57: Q27 Transport used by Province

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Private car / 4x4	53	55	63	32	39	59	39
Boat	23	20	21	58	76	59	61
Public transport	22	22	11	27	27	22	32
Air	21	18	32	66	27	37	61
Hire car / 4x4	12	12	5	6	6	11	0
Walk	9	10	5	5	3	11	4
Taxi	8	9	16	8	12	11	4
Coach / Minibus tour	3	3	5	2	9	4	11
Guided 4x4 tour	1	1	0	2	0	0	0
Motorbike/Bicycle	0	0	0	0	0	0	0
Other	2	2	5	3	0	11	4

Base: all visitors

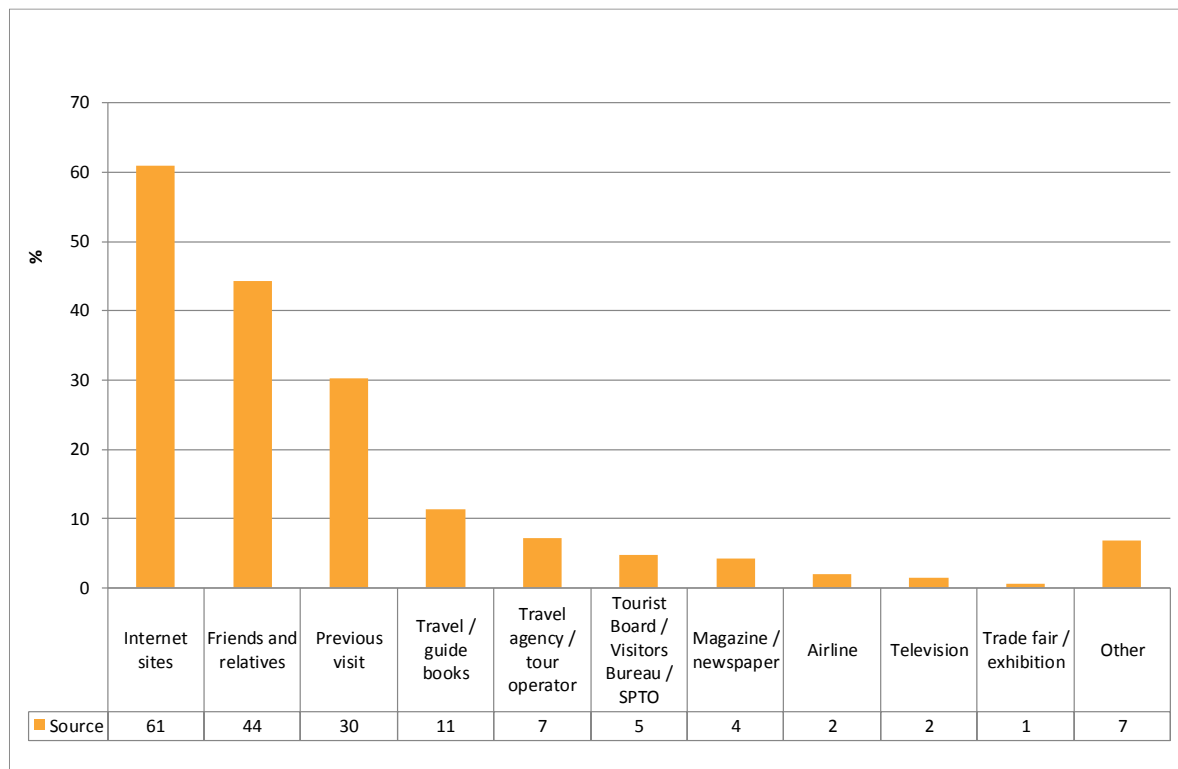
Differences by Provinces are:

- Honiara more likely to use
 - Private car/4x4 55%
- Western Province more likely to use
 - Boat 58%
 - Air (domestic) 66%
- Central Province more likely to use
 - Boat 76%
- Malaita more likely to use
 - Boat 59%
 - Air (domestic) 37%

11 INFORMATION SOURCES

Chart 15: Q20 Information sources used

Base: 400



Base: all visitors

On average visitors used 1.74 forms of information before they arrived.

Internet sites are the most common source of information with almost two-thirds (61%) using online sites for information.

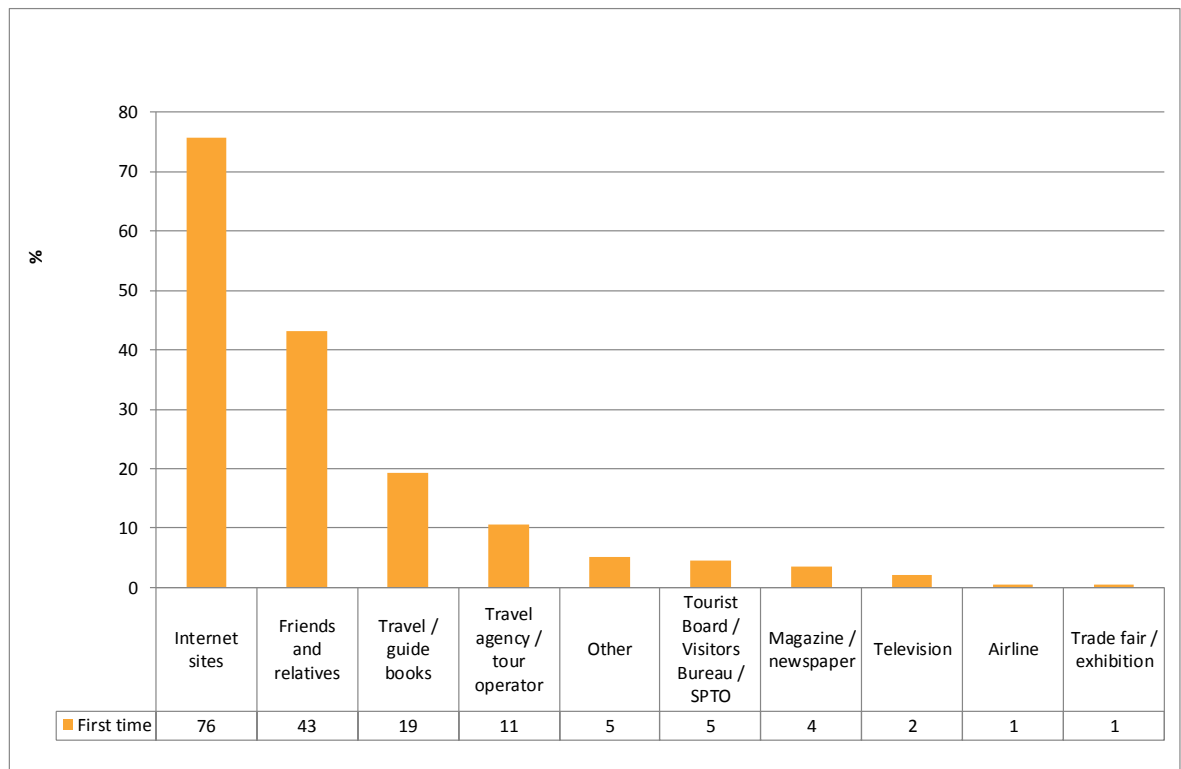
Other key sources are:

- Friends and relatives 44%
- Previous visits 30%

The low use of Solomon Island Visitors Bureau / SPTO does not mean that these are not important in driving visits to Solomon Islands. Both are engaged with travel industry development and are likely to be also included in the internet sites visitors have used. It is very difficult for research participants to accurately provide a list of sites they have visited.

Chart 16: Q20 Information sources by first time visitors

Base: 197



Base: first time visitors

Internet sites are even more important for first time visitors to Solomon Islands. Over three-quarters (76%) use online sites.

Other key sources for first time visitors are:

- Friends and relatives 43%
- Travel/guide books 19%
- Travel agency/tour operator 11%

The data shows there is low use for travel agents. First time visitors use internet sites or information from people they know.

Table 58: Q20 Information sources used by source market

Base: 400

	NET	Australia	New Zealand	Fiji	USA / Canada	Asia	Continental Europe	Pacific Islands	UK	Other
Internet sites	61	59	54	59	61	70	96	42	60	100
Friends and relatives	44	50	33	53	25	48	26	53	30	0
Previous visit	30	35	33	44	11	22	0	32	20	0
Travel / guide books	11	6	4	9	21	19	52	5	30	0
Travel agency / tour operator	7	5	4	6	32	4	9	11	10	0
Tourist Board / Visitors Bureau / SPTO	5	5	0	3	7	7	4	0	30	0
Magazine / newspaper	4	4	2	6	11	7	0	5	0	0
Airline	2	2	0	9	0	0	0	0	0	0
Television	2	1	0	3	0	7	0	5	0	0
Trade fair / exhibition	1	0	0	3	0	0	4	0	0	0
Other	7	4	21	9	4	0	4	11	10	0

Base: all visitors

- Visitors from Australia are more likely to use:
 - Friends and relatives 50%
 - Previous visits 35%
- Visitors from USA/Canada are more likely to use travel agency/tour operator 32%
- Visitors from Continental Europe are almost all likely to use internet sites 96%
 - They also use travel/guide books 52%

Table 59: Q20 Information sources by main reason for visit

Base: 400

	NET	Business / Conference	Holiday / Leisure / Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Internet sites	61	58	81	41	50	50	55
Friends and relatives	44	34	34	75	75	100	40
Previous visit	30	41	10	35	45	50	33
Travel / guide books	11	5	26	6	15	0	3
Travel agency / tour operator	7	3	19	1	5	0	0
Tourist Board / Visitors Bureau / SPTO	5	5	4	7	5	0	3
Magazine / newspaper	4	3	4	4	5	0	8
Airline	2	3	1	0	5	0	3
Television	2	0	3	0	5	0	3
Trade fair / exhibition	1	0	1	0	5	0	0
Other	7	8	3	7	5	0	15

Base: all visitors

- Business/conference visitors are more likely to have information from a previous visit 41%
- Holiday/vacation visitors use a wider range of information sources
 - Internet sites 81%
 - Travel/guide books 26%
 - Travel agency/tour operator 19%
- Visiting friends or relatives get their information from those they are visiting 75%
 - This answers the question whether the information from friends or relatives are people living in Solomon Islands

Table 60: Q20 Information sources by Province

Base: 400

	NET	Honiara	Other areas of Guadalcanal	Western	Central	Malaita	Other areas
Internet sites	61	59	68	74	76	48	71
Friends and relatives	44	45	68	44	52	74	46
Previous visit	30	32	11	16	15	26	25
Travel / guide books	11	11	26	19	15	19	14
Travel agency / tour operator	7	6	16	10	18	11	11
Tourist Board / Visitors Bureau / SPTO	5	5	11	6	0	15	4
Magazine / newspaper	4	4	11	3	3	0	7
Airline	2	2	0	1	0	7	0
Television	2	1	0	2	6	0	7
Trade fair / exhibition	1	1	0	0	3	4	0
Other	7	7	0	11	0	15	0

Base: all visitors

Differences by Province are:

- Honiara visitors are more likely to use information from a previous visit 32%
- Other areas of Guadalcanal are more likely to use
 - Friends and relatives 68%
 - Travel/guide books 26%
- Western Province visitors are more likely to use
 - Internet sites 74%
 - Travel/guide books 19%
- Central Province visitors are more likely to use travel agency/tour operators 18%

12 EXPENDITURE DATA (TABLES)

Table 61: Estimated expenditure by source market

Base: 399

	NET	Australia	New Zealand	Fiji	USA / Canada
Package (retained spend)	\$11,240,228	\$3,446,786	\$3,108,477	\$482,228	\$3,095,143
Accommodation	\$100,558,567	\$49,927,847	\$11,967,575	\$6,251,225	\$7,476,750
Transfers	\$58,826,003	\$24,569,051	\$6,094,417	\$4,809,024	\$1,654,418
Domestic Solomon Islands airfares	\$17,850,212	\$8,423,738	\$2,762,211	\$1,375,956	\$1,045,091
Activities	\$5,448,517	\$3,534,750	\$160,709	-	\$239,566
Breakfasts	\$7,756,134	\$3,713,047	\$483,319	\$2,854,819	\$151,145
Lunch / Dinner	\$3,267,993	\$1,875,869	\$721,944	\$313,624	\$80,266
Drinks	\$9,930,647	\$4,451,077	\$2,141,481	\$639,382	\$659,137
Other	\$18,590,744	\$5,346,409	\$694,824	\$239,268	\$4,456,949
Total	\$233,469,046	\$105,288,574	\$28,134,958	\$16,965,526	\$18,858,465

	Asia	Continental Europe	Pacific Islands	UK	Other
Package (retained spend)	\$254,018	\$752,076	\$3,698	\$110,418	-
Accommodation	\$3,848,147	\$2,781,693	\$8,428,818	\$9,876,512	-
Transfers	\$2,737,354	\$4,954,376	\$2,057,578	\$11,932,982	\$16,801
Domestic Solomon Islands airfares	\$886,957	\$1,939,183	\$742,225	\$674,852	-
Activities	\$78,406	\$172,190	\$70,005	\$1,192,892	-
Breakfasts	\$97,983	\$224,640	\$29,566	\$201,615	-
Lunch / Dinner	\$71,848	\$81,537	\$122,906	-	-
Drinks	\$348,861	\$441,501	\$778,772	\$470,436	-
Other	\$715,469	\$4,368,173	\$128,724	\$2,640,926	-
Total	\$9,039,043	\$15,715,369	\$12,362,293	\$27,100,633	\$16,801

Base: all visitors with nights in Solomon Islands

Table 62: Estimated expenditure by main reason for visit**Base: 399**

	NET	Business/ Conference	Holiday/ Leisure/ Recreation	Visiting Friends or Relatives	Religion	Wedding	Other
Package (retained spend)	\$11,240,228	\$3,957,707	\$6,333,046	\$342,921	\$8,073	-	\$600,615
Accommodation	\$100,558,567	\$51,570,417	\$24,341,066	\$5,926,135	\$1,980,999	\$27,870	\$16,712,081
Transfers	\$58,826,003	\$13,671,986	\$11,035,195	\$12,217,894	\$1,507,522	\$56,004	\$20,337,401
Domestic Solomon Islands airfares	\$17,850,212	\$7,317,244	\$5,350,093	\$2,127,302	\$624,720	\$89,589	\$2,341,263
Activities	\$5,448,517	\$672,432	\$2,663,877	\$853,376	\$129,413	-	\$1,129,420
Breakfasts	\$7,756,134	\$1,180,221	\$2,617,802	\$680,786	\$20,535	\$168,013	\$3,088,778
Lunch / Dinner	\$3,267,993	\$859,035	\$442,152	\$1,048,252	\$147,829	-	\$770,726
Drinks	\$9,930,647	\$2,561,763	\$1,880,763	\$3,643,412	\$585,302	\$28,002	\$1,231,405
Other	\$18,590,744	\$6,159,360	\$7,717,845	\$2,187,192	\$2,205,761	-	\$320,586
Total	\$233,469,046	\$87,950,166	\$62,381,838	\$29,027,270	\$7,210,153	\$369,479	\$46,532,274

Base: all visitors with nights in Solomon Islands

Table 63: Estimated expenditure by Province**Base: 399**

	NET	Honiara	Other Guadalcanal	Western	Central	Malaita	Other
Package (retained spend)	\$11,296,712	\$4,690,855	-	\$1,669,721	\$2,482,514	\$72,808	\$1,260,890
Accommodation	\$100,846,826	\$67,198,145	\$1,197,061	\$16,845,518	\$7,742,397	\$2,505,795	\$4,470,101
Transfers	\$59,211,744	\$49,782,923	\$1,324,763	\$5,469,608	\$1,410,988	\$1,364,460	\$1,291,655
Domestic Solomon Islands airfares	\$17,958,475	\$6,650,674	\$379,157	\$6,208,086	\$1,378,351	\$1,133,035	\$1,493,386
Activities	\$5,472,128	\$1,709,521	\$87,534	\$2,507,983	\$349,851	\$661,328	\$82,429
Breakfasts	\$7,790,971	\$4,238,530	\$35,407	\$1,785,774	\$899,926	\$344,534	\$290,276
Lunch / Dinner	\$3,278,703	\$1,805,388	\$26,227	\$264,519	-	\$886,971	\$277,539
Drinks	\$10,003,188	\$6,763,726	\$326,356	\$1,098,188	\$406,034	\$939,120	\$390,704
Other	\$18,623,280	\$16,052,524	\$678,242	\$1,256,251	\$471,234	\$246,176	\$345,081
Total	\$234,482,029	\$158,892,286	\$4,054,746	\$37,105,649	\$15,141,296	\$8,154,227	\$9,902,060

Base: all visitors with nights in Solomon Islands

Province allocated by most nights in Province

13 DEFINITIONS AND CALCULATIONS

13.1 Abbreviations

- IVS (International Visitor Survey)
- Holiday/vacation (full text is Holiday/Leisure/Recreation)

13.2 International Visitor Survey

An IVS is an international standard of reporting that allows comparison between countries.

The Solomon Islands IVS does not include:

- Airfare (including Solomon Airlines)
- Revenue from airport services (except retail purchases)

13.3 Visitor

A visitor is any person who travels outside their usual environment staying at least a night not exceeding a year and does not have a long-term employment contract. This includes those who are transiting to another destination.

13.4 Classification of visitors for main reason of visit

The classification of visitors is self-reported during interviews from which the main reason of visit is derived.

13.5 Sample size

The sample size of the 2016 IVS is 400 interviews. This sample size gives a confidence level of 4.9% at the 95% confidence interval. Differences are only reported when they are significant at the 95% confidence level or higher. Small base sizes that may make the data unreliable has been noted in the report.

13.6 Reliability of findings

The sample size is adequate for the task of accurate reporting for 2016 and will provide a stable base for future research.

13.7 Groups in data

The IVS records data for groups rather than individuals meaning that the 400 interviews completed represent 1,082 individuals (average party size of 2.7). In all cases where this may affect findings,

'% responses' have been used. This shows proportion of the total number of responses (weighted) represented by the cell.

This effectively means that data is shown as a single variable eliminating the issue of groups. For example, gender is shown correctly for all visitors allowing for the size of the party.

13.8 Sampling procedure

The sampling uses a 'random probability' approach where a random person is selected in the Honiara International Airport departure lounge for an interview.

A single person is selected from a group sharing the same expenditure. If more than one person is involved in answering the questionnaire (which is common with travelling couples), the primary person for interview is the person with the last birthday. This simple approach randomises the respondents.

To ensure a random person is selected, staff are instructed to commence interviews by each row of seats in the departure lounge as a continuous 'loop' so all seats in the lounge are included. They stop and approach the person in every fifth seat, unless they are sharing expenses with the person from the previous interview.

13.9 Expenditure

13.9.1 Calculation of spend

To calculate spend the following steps are made:

- Spend multiplied by base size for the number of respondents
 - Total spend for data collected
- Total spend divided by party size
 - Per-person spend in data collected
- Total spend for data collected divided by base size for survey
 - Gives a per-person spend for data collected
- Per-person spend multiplied by percentage of visitors in each category
 - Gives the total spend for each category

This process means that data collected is effectively reduced to a per person average regardless of whether they spent money in the category so it can then be accurately projected for all visitors.

13.9.2 Allocation of spend to Provinces

Visitors may spend in more than one Province or Tourism Area. In this survey Province spend is estimated by the number of visitor nights spent in each Province.

13.9.3 Package spend

Some visitors purchase their travel to Solomon Islands as part of a 'package' and may not know the cost of specific components included in this travel. A travel package typically includes airfare (not part of IVS data), accommodation, transfers and in some cases meals.

Package spend is recorded in the visitor's currency and then converted to Solomon Island Dollars.

13.9.4 Package retention rate

Using data collected, StollzNow Research has used an existing spend model.

The model used for package spend is:

- 27% removed for commissions and charges not spent in Solomon Islands
 - Travel agent commissions, wholesaler fees etc.
- 42% removed for airfare

This means that for every package dollar spend, thirty-one percent (31%) is retained in Solomon Islands.

This figure is similar to other IVS analysis such as Australia that has a retention rate of thirty percent (30%).

13.9.5 Percent share

This is a statistical technique that allows data where there is greater than one-hundred percent (100%) responses to be treated as one hundred percent. This is used for Provinces visited where the total adds to more than one hundred percent due to people visiting more than one Province.

13.10 Limitations of this research

The limitation of this research is that fieldwork was completed from April 19 to October 14. We have assumed that visitors to Solomon Islands do not vary for other months of the year.

14 QUESTIONNAIRE

INTRO

Good morning/afternoon, my name is XXX from Solomon Islands Visitors Bureau. We're interviewing visitors to find out their opinions of Solomon Islands as a place for people to visit. We're doing this so we can improve our services to visitors. Do you have time to answer a few questions? It will take about 10 minutes. No personal contact details are collected, and privacy is assured.

S1

Do you currently live in Solomon Islands?

S2

Have you been in Solomon Islands for more than one year?

Q1

How many people are there in your group sharing the same expenditure?
IF TRAVELLING ALONE ENTER 1

Q2

How many males and females are in your group sharing the same expenditure?
ENTER 0 FOR NO PEOPLE OF ONE TYPE OF GENDER
CHECK THAT TOTAL EQUALS PARTY SIZE

Q3

What are the ages of people in your group sharing the same expenditure?
ENTER NUMBER OF PEOPLE IN EACH AGE GROUP

Q4

How many nights have you spent away from home; from the time you left until the time you expect to return home?

Q5

How many nights have you spent in Solomon Islands on this trip?

Q6

Is this your first visit to Solomon Islands?

Q7

How many times have you visited Solomon Islands previously?

Q8

What country do you live in?
Australia
Papua New Guinea, Skip to:Q11
New Zealand, Skip to:Q11
Fiji, Skip to:Q11
Other Pacific, Skip to:Q11
Asia, Skip to:Q11
USA, Skip to:Q10
Other (please tell us), Skip to:Q11

Q9

What State or Territory do you live in?
Queensland
NSW
Victoria
Tasmania
South Australia
Western Australia
ACT
Northern Territory
jump_to_q11

Q10

What State do you live in?

Q11

Which airline did you use when flying to Solomon Islands?
Air Caledonie
Air New Zealand
Air Niugini
Air North
Fiji Airways
Air Rarotonga
Air Tahiti Nui

Air Vanuatu
Our Airline
Qantas
Silk Airlines
Solomon Airlines

Q12

Are you using the same airline to leave Solomon Islands?

Q13

Which airline are you using to leave Solomon Islands?

Air New Zealand
Air Niugini
Air North
Fiji Airways
Air Rarotonga
Air Tahiti Nui
Air Vanuatu
Our Airline
Qantas
Silk Airlines
Solomon Airlines
Virgin Australia
Virgin Australia
Virgin Samoa
United Airlines
Arrived by Sea, Skip to:Q14
Other (please specify)

Q14

What was the main purpose of your visit to Solomon Islands?

SHOWCARD

- 1) Holiday/Leisure/Recreation
- 2) Visiting Friends or Relatives
- 3) Business/Conference
- 4) Wedding
- 5) Transit
- 6) Religion
- 7) Other (please specify):

Q15

Which of these best describes the main reason for your visit to Solomon Islands for a holiday or vacation?

SHOWCARD

- 1) Rest and relaxation
- 2) Honeymoon
- 3) Scuba diving
- 4) Wedding anniversary
- 5) Surfing
- 6) Solomon Islands culture
- 7) Other (please specify)

Q16

Have you visited or do you plan to visit any other countries in the Pacific on this trip?

Yes

No

Skip to:Q19

Q17

Which other Pacific countries did you visit or plan to visit?

American Samoa
Cook Islands
Fiji
French Polynesia
Guam
Kiribati
Marshall Islands
Micronesia
Nauru
New Caledonia
Niue
Northern Mariana Islands
Palau
Papua New Guinea
Samoa
Timor-Leste
Tokelau
Tonga
Tuvalu
Vanuatu
Wallis and Futuna
Other (specify)

Q18

How many nights did you spend in each country?

Q19

Before you came here, what attracted you to Solomon Islands?

Culture

Climate

Curiosity

Diversity of attractions

Beaches

Scenery

Tranquillity

Value for money

Activities

Friendly people

Other (please specify):

Q20

What sources of information did you use to learn about Solomon Islands before your trip?

SHOWCARD

1) Tourist Board / Visitors Bureau / SPTO

2) Internet sites

3) Travel agency / tour operator

4) Airline

5) Travel / guide books

6) Magazine / newspaper

7) Trade fair / exhibition

8) Television

9) Friends and relatives

10) Previous visit

11) Other (please specify):

Q21

How did you make your booking for AIR TRAVEL for this trip?

SHOWCARD

1) Travel agent

2) Direct with the airline

3) Online air travel booking service e.g. Expedia, Hotels.com etc.

4) Through friends, relatives or business in Solomon Islands

5) Other (please specify)

Q22

How did you make your ACCOMMODATION booking for this trip?

SHOWCARD

1) Travel agent

2) Direct with the hotel

3) Online hotel booking service e.g. Expedia, Hotels.com etc.

4) Through friends, relatives or business in Solomon Islands

5) No accommodation booking made before arriving

6) Other (please specify)

Q23

Which types of accommodation did you stay in whilst visiting Solomon Islands?

SHOWCARD

1) Hotel / Resort / Motel

2) Guesthouse / Pensione / B&B

3) Backpackers Accommodation / Hostel

4) Self-Catering / Rented Accommodation

5) Friends and Family

6) Camp Site

7) Other (please specify)

Q24

Which of these leisure activities did you carry out during your stay in Solomon Islands?

SHOWCARD

1) Shopping

2) Fishing

3) Hiking / Trekking

4) Sightseeing / Cultural tours

5) 4x4 trails

6) Nature / Landscape touring

7) Historical / Archaeological sites

8) Adventure sports

9) Scuba diving

10) Diving

11) Bird watching

12) Ballooning / Pleasure flights

13) Sailing/Kayaking

14) Swimming/Snorkelling

15) Other (please specify):

16) No activities

Q25

Which one of these activities would you regard as the MAIN activity of your visit?
None of these is my main activity

Q26

Of the [Q5][opt:1459914280669_0] nights you spent in Solomon Islands how many did you spend

in each of these areas?

0 = NO NIGHTS IN PROVINCE

Honiara

Other areas of Guadalcanal

Western

Central

Malaita

Isabel

Makira

Rennel & Bellona

Choiseul

Temotu

Q27

How did you travel around Solomon Islands?

SHOWCARD

- 1) Private car / 4x4 [Include borrowing a friends' /business car]
- 2) Hire car / 4x4
- 3) Coach / Minibus tour
- 4) Guided 4x4 tour
- 5) Public transport
- 6) Air (within the country)
- 7) Motorbike/Bicycle
- 8) Other (please specify):

EXPENDITURE

I am now going to ask you some questions about how much money you spent in Solomon Islands.

We will use this information to estimate how important tourism is in our economy. Your answers

will be confidential.

I would now like you to think about how much you and the party sharing expenditure spent on your trip.

Q28

Did you travel to Solomon Islands as part of a travel package?

A TRAVEL PACKAGE IS WHERE ELEMENTS ARE BUNDLED EG AIRFARE & ACCOMMODATION

Travel package

Some costs pre-paid before arrival, Skip to:Q35

All paid in Solomon Islands, Skip to:Q38

Q29

How did you pay for your travel package?

SHOWCARD

- 1) Travel agent in person, phone or email
- 2) Booked online with hotel on their website
- 3) Booked with a hotel by phone or email
- 4) Booked online with a travel website or online travel agent e.g. Expedia, Hotels.com etc.
- 5) Other

Q30

In your own currency what was the cost of your travel package?

Q31

What currency did you use to pay for your package?

New Zealand Dollar

Australian Dollar

US Dollar

European Euro

Japanese Yen

South Korean Won

Chinese Rimi

UK Pound Sterling / Great British Pound

New Taiwan Dollar

Singapore Dollar

Indonesian Rupiah

Hong Kong Dollar

Malaysian Ringgit

Swiss Franc

Vanuatu Vatu

Fiji dollar

South African Rand

Canadian dollar

Other

Q32

What did your travel package include?
SHOWCARD

- 1) International airfare
- 2) Accommodation
- 3) Transfers
- 4) Domestic Solomon Islands airfare
- 5) Activities
- 6) Breakfasts
- 7) Lunches / Dinners
- 8) Drinks
- 9) Other

Q33

Did the package include nights in any other countries?

Yes

No, Skip to:Q38

Q34

How many nights in other countries were included in your travel package?

nights in other countries in package

Q35

Which of these did you pay for before you arrived?

INTERNATIONAL AIRFARE IS NOT INCLUDED

- 1) Accommodation
- 2) Transfers
- 3) Domestic Solomon Islands airfare
- 4) Activities
- 5) Breakfasts
- 6) Lunches / Dinners
- 7) Drinks
- 8) Other

Q35G

How did you pay for these items?

SHOWCARD

- 1) Travel agent
- 2) Direct:website
- 3) Direct:phone/ email
- 4) Travel website
- 5) Other

Q36

In your own currency how much did you spend for these items?

Q37

What currency did you use to pay for these items?

- New Zealand Dollar
- Australian Dollar
- US Dollar
- European Euro
- Japanese Yen
- South Korean Won
- Chinese Rimi
- UK Pound Sterling / Great British Pound
- New Taiwan Dollar
- Singapore Dollar
- Indonesian Rupiah
- Hong Kong Dollar
- Malaysian Ringgit
- Swiss Franc
- Vanuatu Vatu
- Fiji dollar
- South African Rand
- Canadian dollar
- Other

Q38

How much did you spend in the following areas WHILE IN SOLOMON ISLANDS?

[IF PACKAGE OR PRE-PAID] Spend is in addition to the amount you have paid for your travel package/pre-paid.

ALL AMOUNTS ARE \$SI

NO SPEND = \$0

SHOWCARD

- 1) Accommodation
- 2) Food and drinks
- 3) Transport
- 4) Organised tours
- 5) Activities
- 6) Other leisure and entertainment
- 7) Shopping
- 8) Other areas

Q39

How would you rate your visit to Solomon Islands?

SHOWCARD

- 1) Very enjoyable
- 2) Enjoyable
- 3) Fair
- 4) Disappointing
- 5) Very disappointing

Q40

Would you recommend Solomon Islands to friends, relatives or colleagues at home?

SHOWCARD

- 1) Yes, definitely
- 2) Yes, probably
- 3) Possibly
- 4) No, probably not
- 5) No, definitely not

Q41

How likely or unlikely is it that you will return to Solomon Islands for a holiday or visit during the next five years?

SHOWCARD

- 1) Very likely
- 2) Likely
- 3) Uncertain
- 4) Unlikely
- 5) Very unlikely

Q42

What were the highlights of your visit to Solomon Islands ?

Q43

What were your worst experiences or disappointments?

Q44

Do you have any suggestions or other comments to improve tourism in Solomon Islands?

thanks

Thank you for your time today, lukim yu next time.