FSM - Yap

International Visitor Survey Report
July - December 2024

Acknowledgements

- The Pacific Tourism Organisation (SPTO) expresses its gratitude to all contributors to this report on IVS data from July to December 2024, which provides insights into the visitor experience, enhancing our understanding of travel trends and behaviors across the region.
- We extend our sincere thanks to all the visitors who participated in the survey, whose contributions made this analysis possible. We also wish to express our gratitude to the Yap Visitors Bureau for their initiative in conducting the IVS survey using their own instruments and for effectively coordinating the posters with QR codes that provided access to the survey link.
- We also extend our sincere thanks to the New Zealand Government for their support and collaboration.
- Appreciation goes to the SPTO researchers and analysts for their diligent work in analyzing the collected data, compiling this comprehensive report.
- Further research is needed to refine economic impact estimates, particularly the rate of prepaid expenditure into the local economy. Your ongoing support is highly valued.
- Thank you to everyone involved.

Executive Summary

- The survey, conducted from July to December 2024, analyzed 42 responses representing 4% response rate. Among the respondents, 60% were first-time visitors, and the average household income ranged between USD 150,000 to $200,000.
- Visitors were primarily attracted by nature attractions, cultural experiences, business opportunities, and connections with family and friends in Yap. Overall visitor satisfaction was high, with a rating of 4.5 out of 5. A substantial 95% of visitors indicated they would recommend Yap to others, and 93% expressed willingness to return.
- The average prepaid spend per visitor was USD2,589 with an estimated 40% (USD1,036) flowing into the local economy. In-country spending per visitor per trip averaged USD1,196 with an average stay of 6 nights. This contributed to an estimated* economic impact of USD3 million from July to December 2024.
- Visitors particularly appreciated the friendliness of the locals, the range of activities and attractions, and the cultural diversity. However, there were areas that could benefit from further attention, including airport and flight services, activities and attractions, as well as food and beverage offerings. To enhance the overall visitor experience in FSM Yap, additional suggestions included improving public services, infrastructure, and Wi-Fi connectivity, along with enhancements to airport and flight services, and the quality of restaurants and cafes.

*Note: *based on total visitor numbers of 1,147 for the same period.*

Background

- The 2024 July – December Yap International Visitor Survey is an initiative of the Pacific Tourism Data Initiative, funded by the Zealand Ministry of Foreign Affairs and Trade (NZMFAT), and is conducted by the Pacific Tourism Organization (SPTO).
- IVS data is analysed to help us understand the visitor experience and gain insights into tourism recovery in Yap after the border reopening.
- The report includes key sections on visitor profiles and characteristics, information and decision-making, visitor expenditure and satisfaction.
- N.B. Visitor responses were collected through survey links accessed via QR codes on posters placed at the airport and at registered accommodation providers in Yap. The data was collected online using a Google Form.
- All amounts are reported in USD currency.

Disclaimer

- **Reproduction of Material** - Information contained within this publication, including all charts, information, and graphical representations, may be used, reproduced, or published without prior approval from SPTO and Yap Visitors Bureau. However, the information source must be explicitly referenced and acknowledged in all modes of representation.
- The **survey instrument** used to collect data for the period July – December 2024 was the use of QR codes available on posters and pasted in all accommodation providers for visitors to access while in respective their accommodations.
- Please note that the Pacific Tourism Organization (SPTO) and the Yap Visitors Bureau **do not accept liability for any loss or damage incurred as a result of the use of information contained in this report.** Users are advised to exercise their own judgment in the use of any information provided.

IVS Respondents (July – December 2024)

1,147 Number of Visitor Arrivals

42 Total Responses Analyzed

4%
Conversion Rate

66 Total Number of People Covered

6%
Of all visitors in this period

FSM Yap International Visitor Survey

Snapshot July – December 2024

Country of residence

38%	18%	12%	5%	5%
USA	Other Pacific Countries	Guam	Other Asian	Philippines

Purpose of visit

50%	41%	5%	2%
Holiday/ Leisure	Business/ Conference/ Meeting	VFR	Trainings

Most Participated Activities

95% Sightseeing	93% Snorkeling
93% Hiking	91% Beach Relaxation
91% Kayaking	91% Diving

Accommodation Type

24%	24%	17%	12%
Hilltop Motel	Mantaray Beach Resort	O'Kefee's Waterfront Inn	Bayside Inn

Information Source

43%	21%	12%	7%
Word of Mouth	Other	Social Media	Referred by Travel Agent

2% 70 years old and over

USD 150k – 200k Avg. Household Income

47% Solo Traveler

60% Visited for the first time

73% Male | **27%** Female

6 nights Average length of stay

Most appealing

49% Friendly local people

Feedback and Comments

22% Airport and flight experience

Improvement

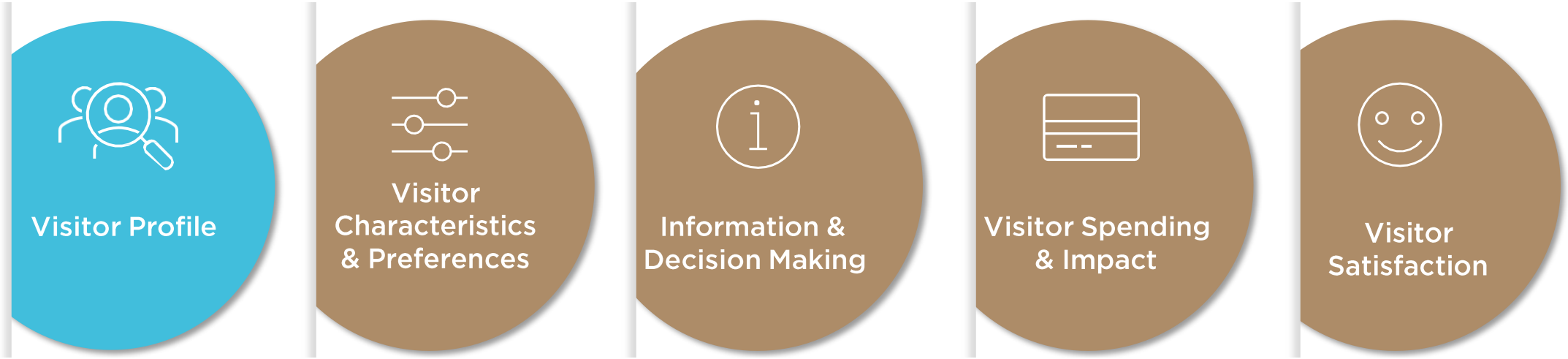
26% Public services, infrastructure and internet connectivity

Economic impact

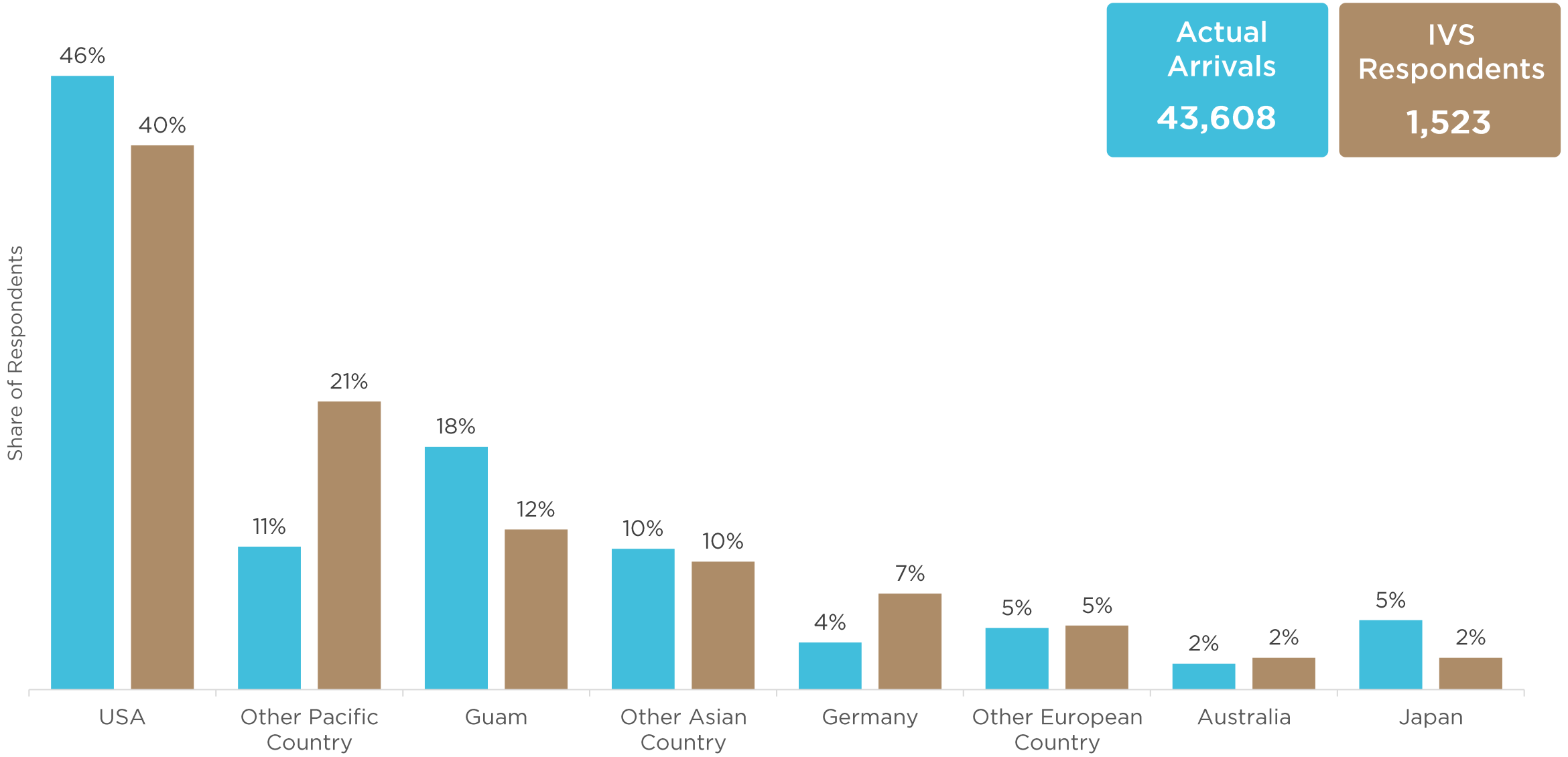
USD1,036 Avg. prepaid spend per person per trip + **USD1,196** Avg. local spend per person per trip = **USD2,232** Total Expenditure per person per trip

Note: The estimated flow-back rate into the FSM Yap state for prepaid spend is 40%. With an average prepaid spend of $3,061 per person per trip, this equates to $1,224.

Report Structure



Source Markets

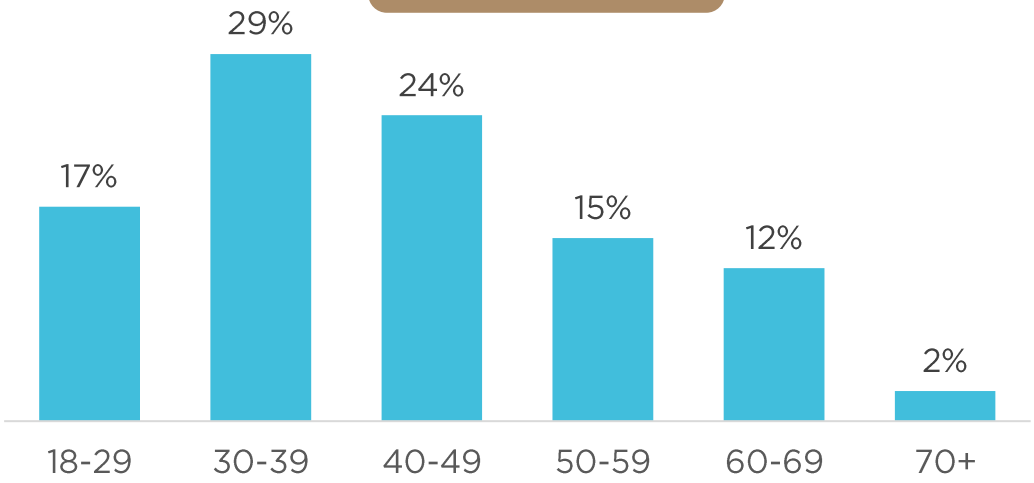


Note: Due to rounding, some totals do not sum to 100%. No weighting was applied, as the sample data is representative..

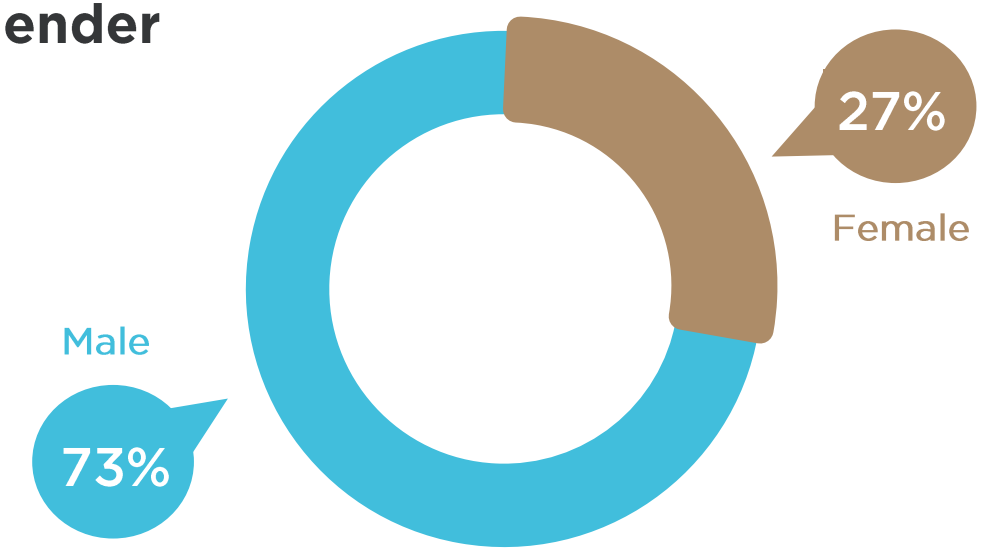
Respondent Demographics

Age

Avg. Age Group
40-49 years

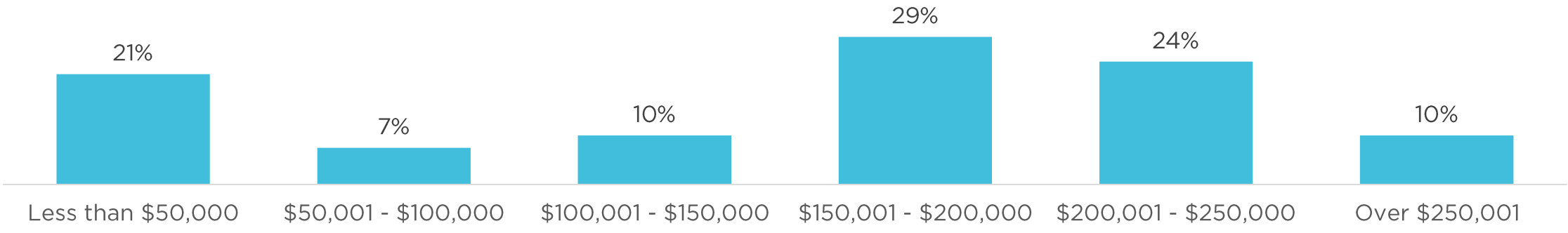


Gender



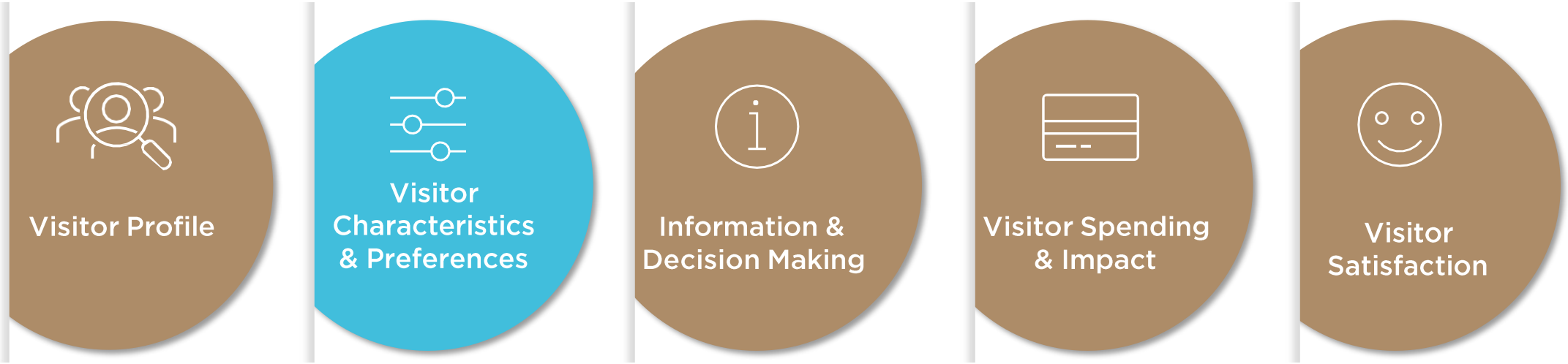
Annual Household Income

Avg. Household Income Group **USD $150k - $200k**



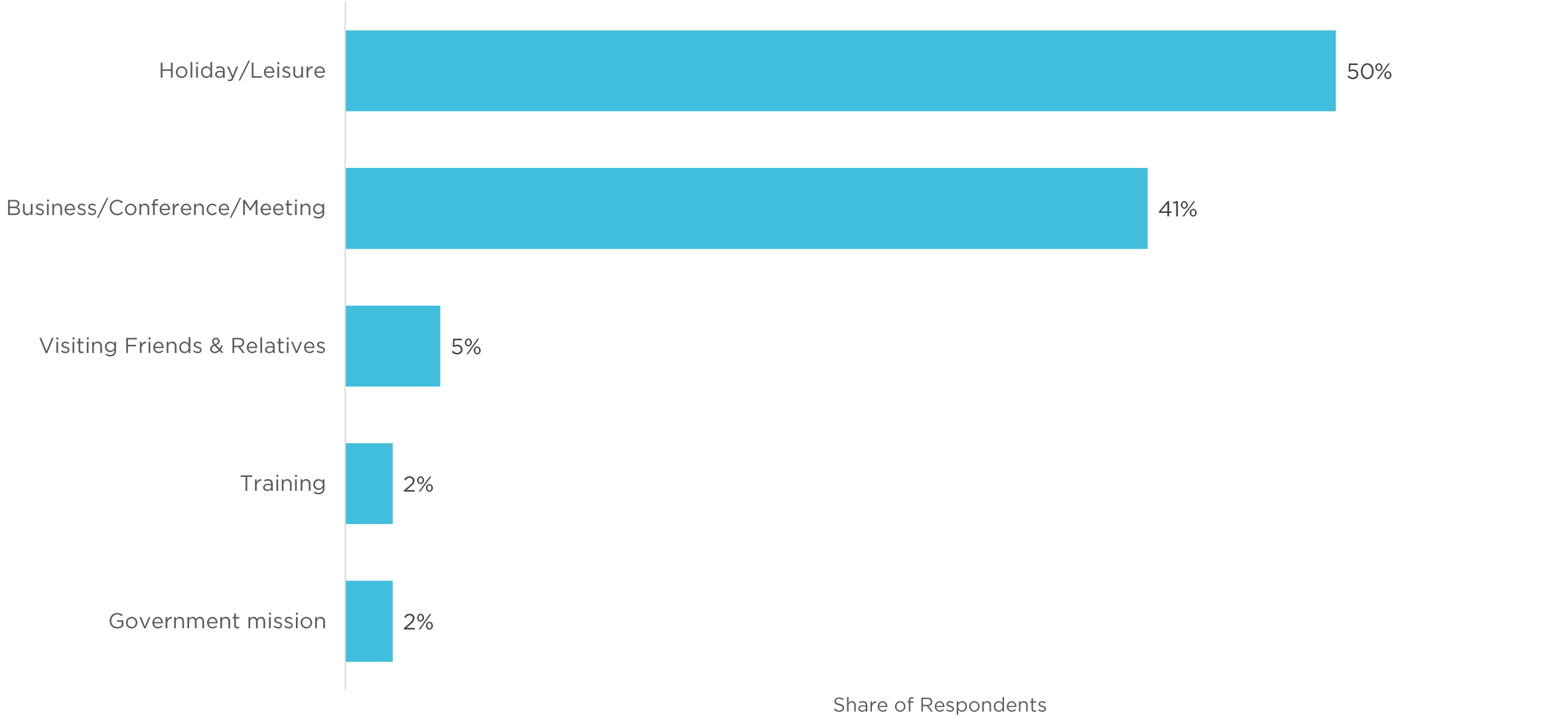
Note: % share of IVS respondents.

Report Structure



Purpose of Visit

Q: What was the main purpose of your visit?

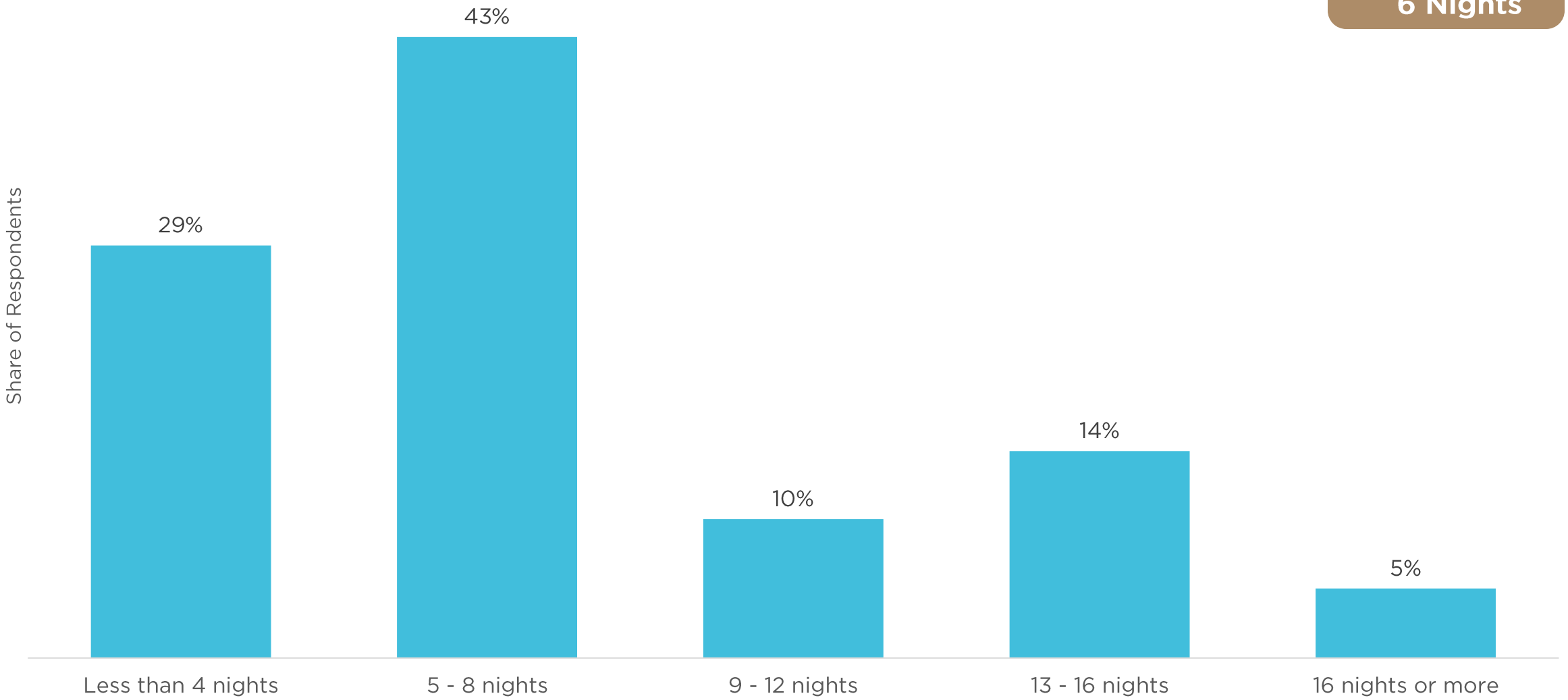


Note: N = 42. Due to rounding, total does not sum to 100%

Length of Stay (nights)

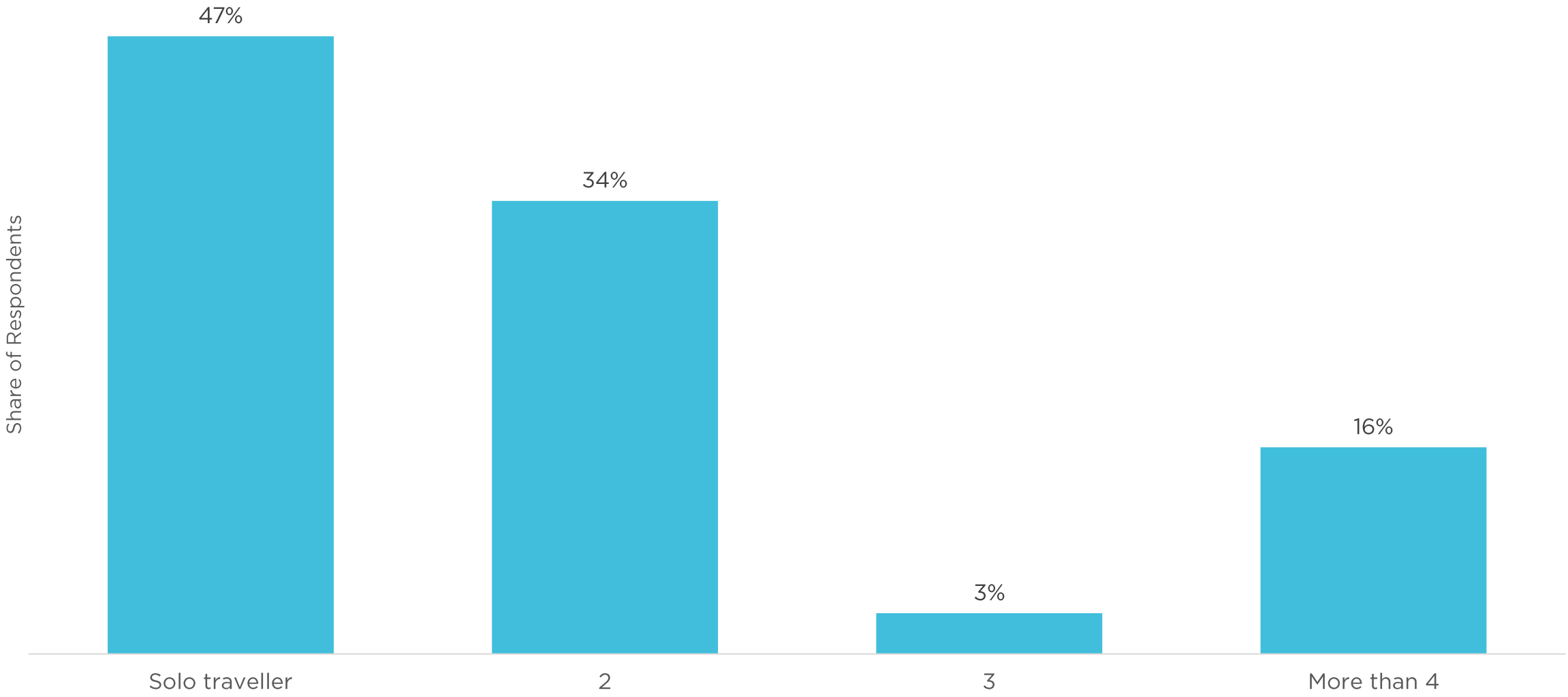
Q: How many nights did you spend in Yap?

Avg. Length of Stay
6 Nights



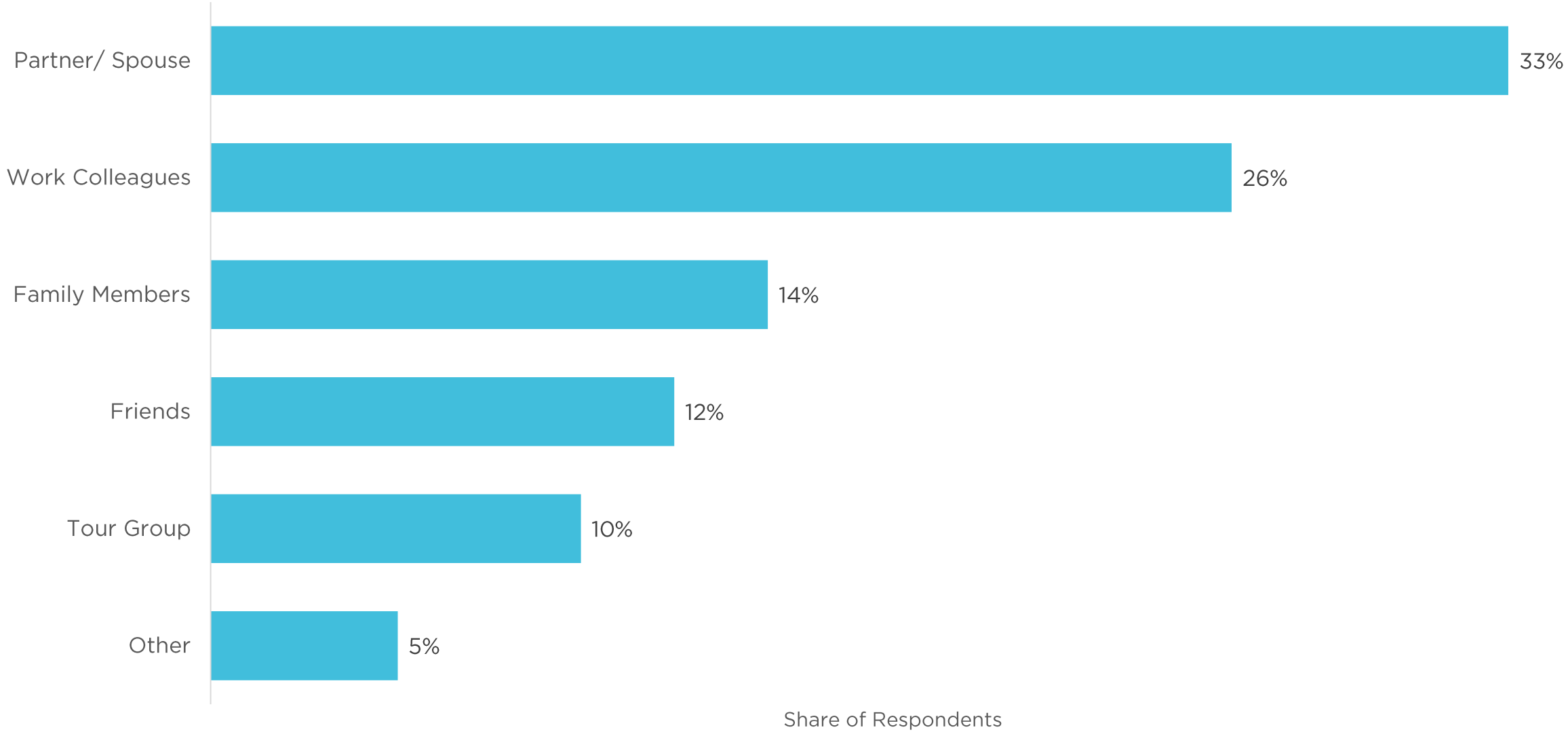
Note: 31 and 31+ days as outliers were removed for length of stay analysis

Travel Group Size



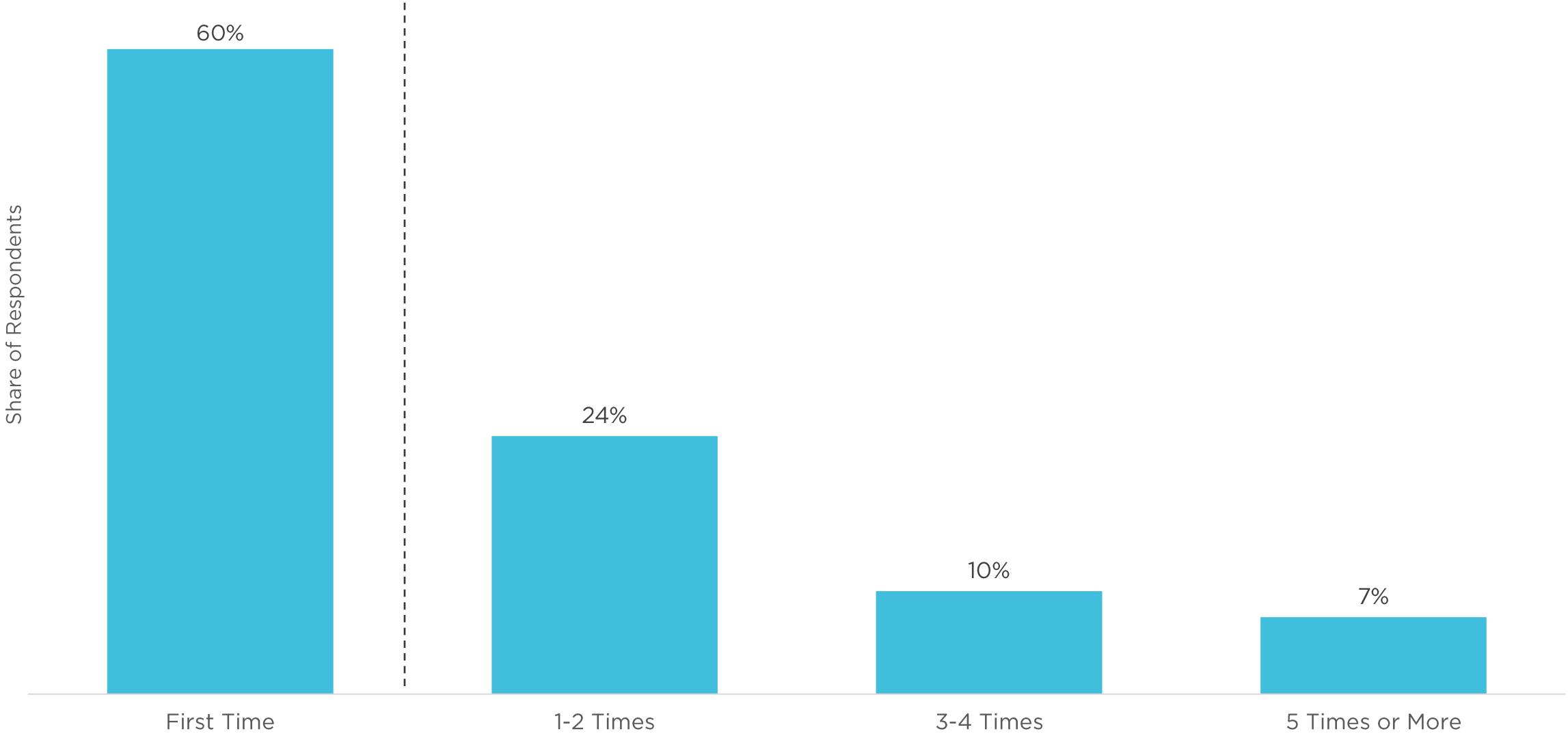
Note: Multiple responses, therefore total does not add up to 100%

Travel Companions



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

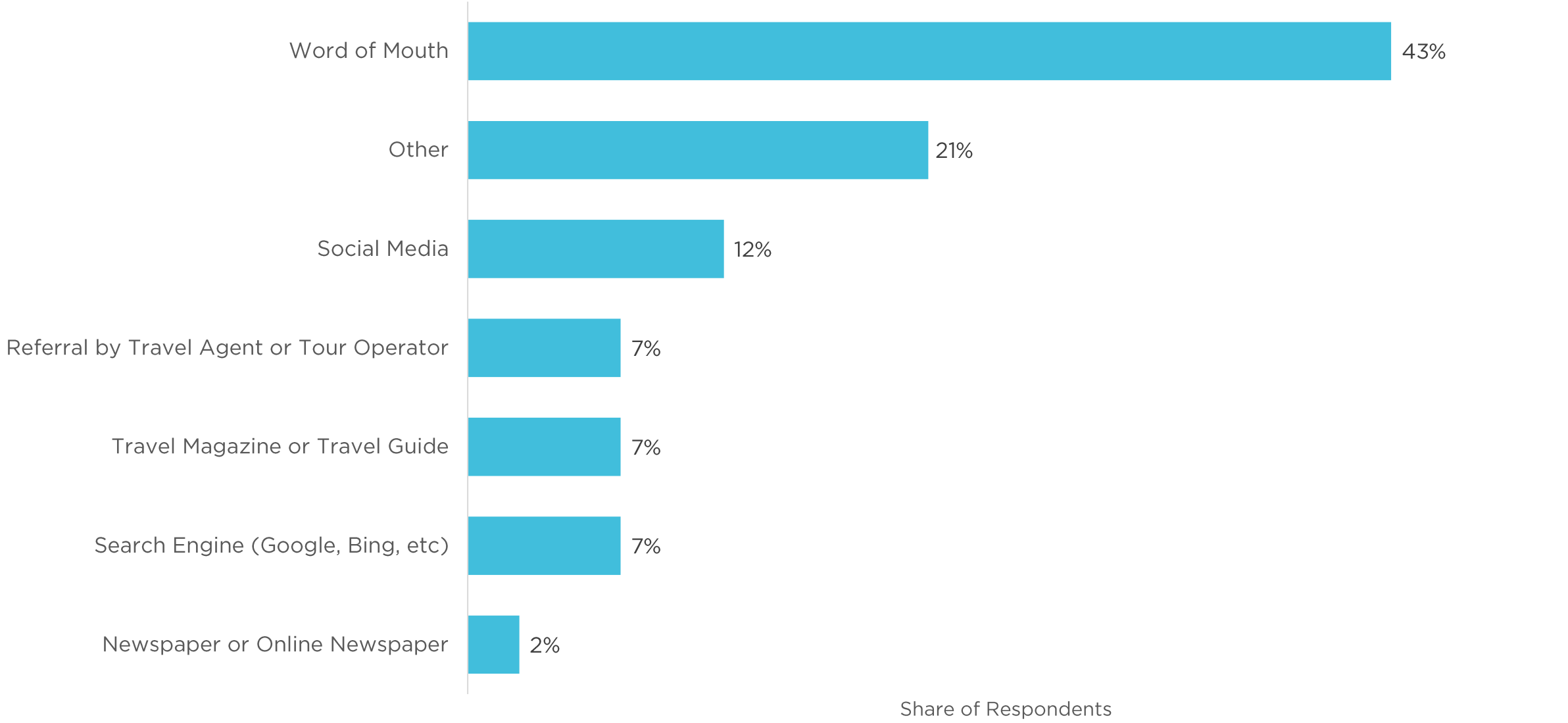
Number Of Visits



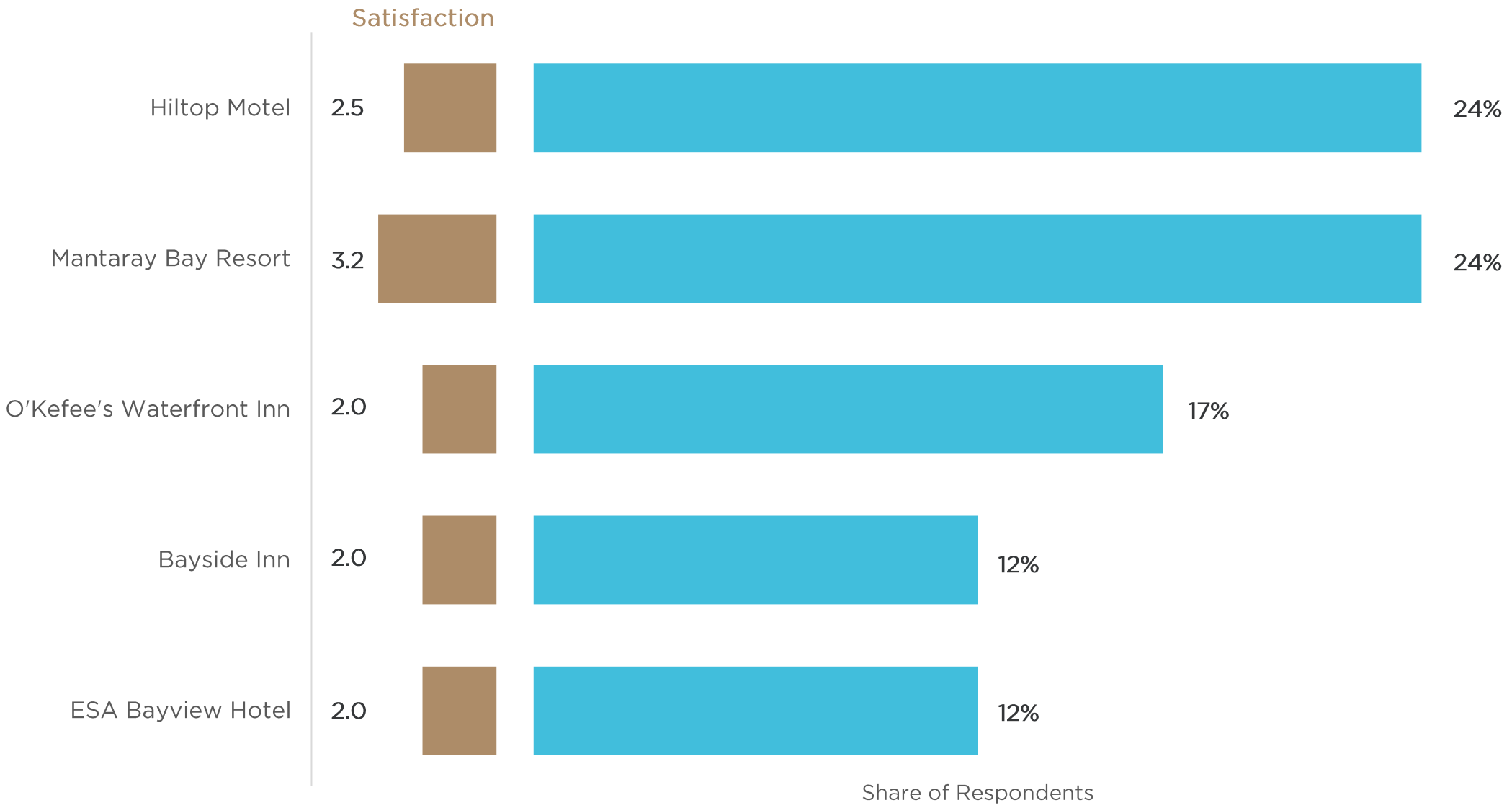
Report Structure

Information Source

Q: How did you find out about Yap?

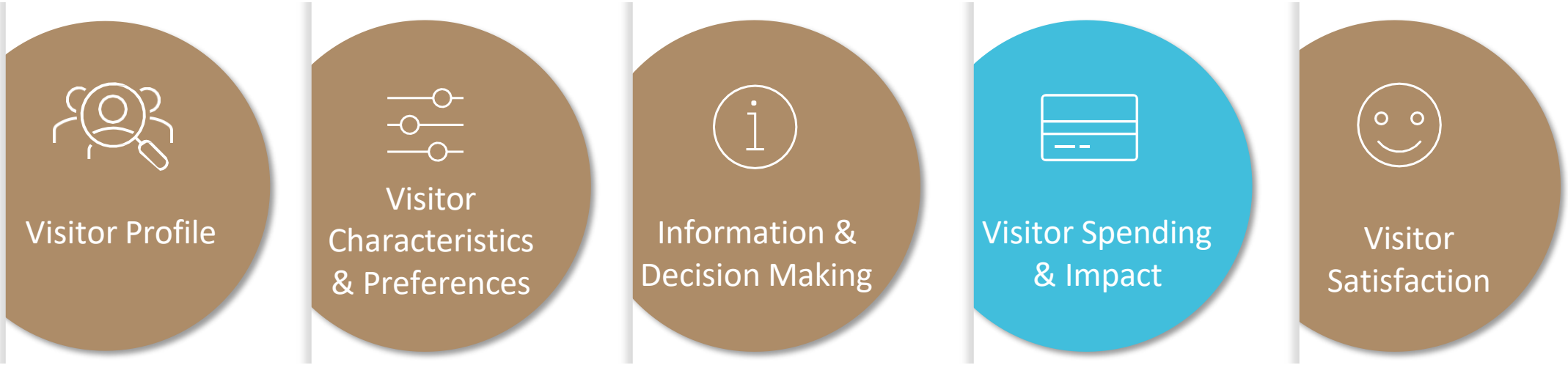


Accommodation Used

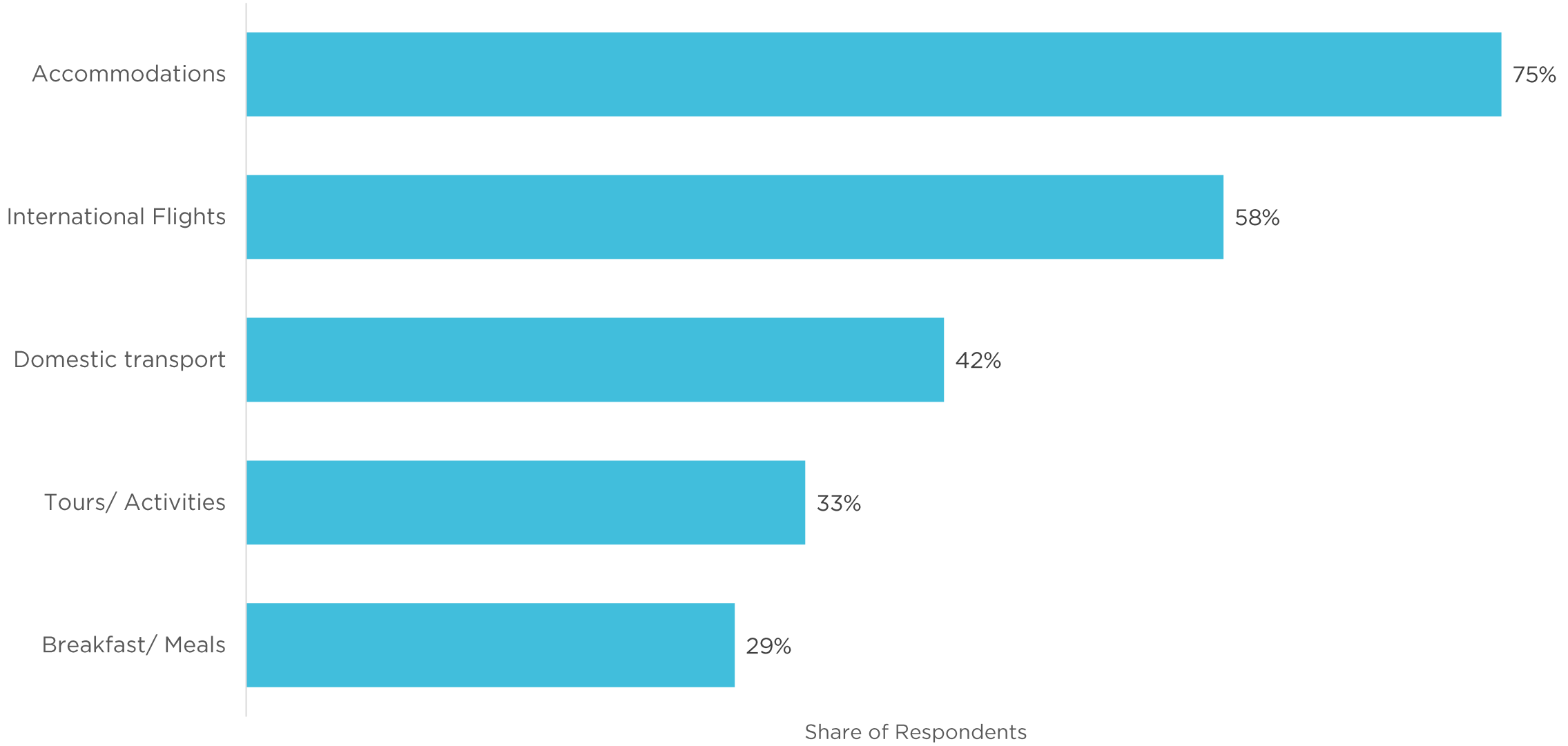


Note: Multiple responses, therefore total does not add up to 100%

Report Structure



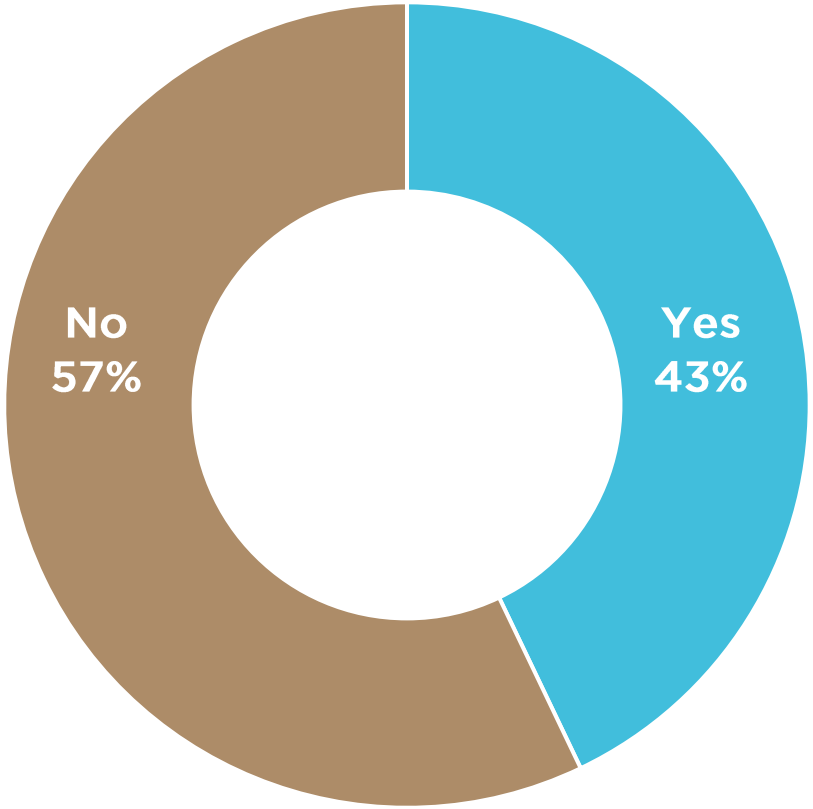
Prepaid Items



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

Prepaid Expenditure

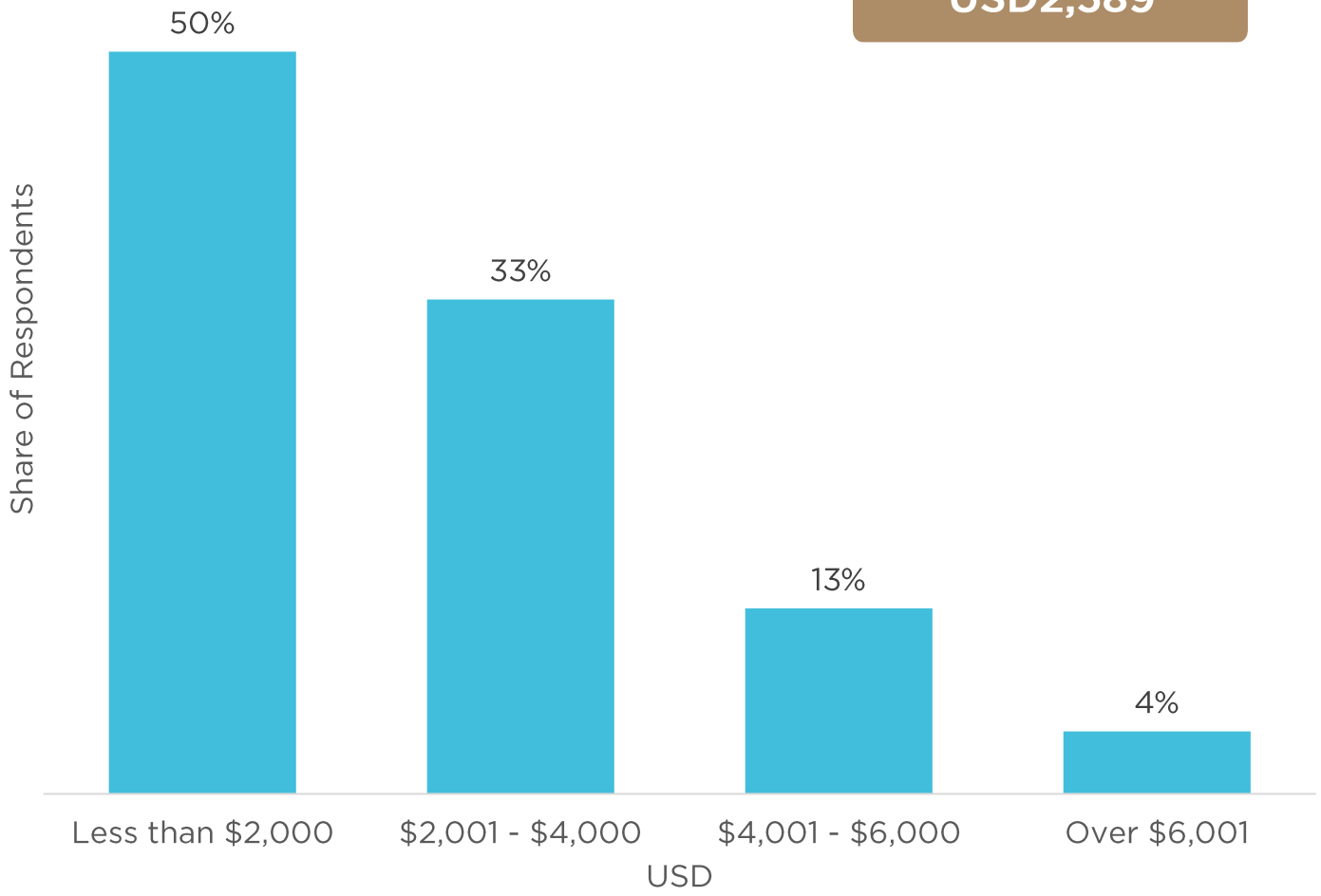
Q: Did you come to Yap on a prepaid package?



Q: How much did you pay in total for your prepaid package?

Avg. Prepaid per Person per Trip

USD2,589



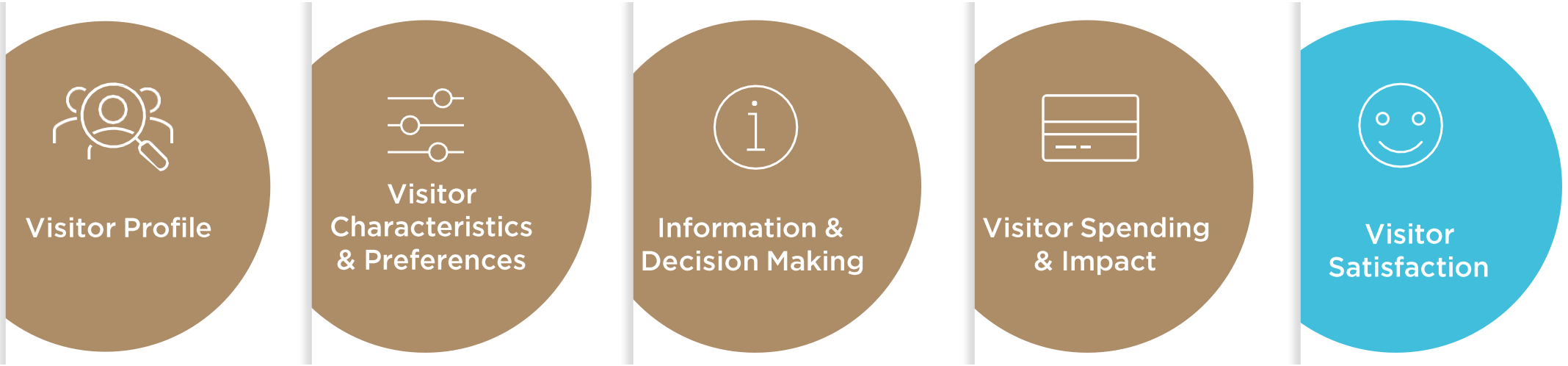
In-country Spend Per Person Per Day While in Yap

	Local Spend Per Person Per Day	
	% of sector	USD
Accommodation (Hotel, Inn, Homestay, etc.)	55	109
Food and beverages (Restaurant meals, Drinks, Takeout, etc.)	19	38
Activities (Tours, Excursion, etc.)	12	24
Transportation (Vehicle rental, Petrol, Taxi, etc.)	9	19
Shopping (Souvenirs, Art & Craft, Groceries, Clothing, Sim Card, etc.)	5	10
TOTAL	100%	199

Economic Impact - Per Person and Total

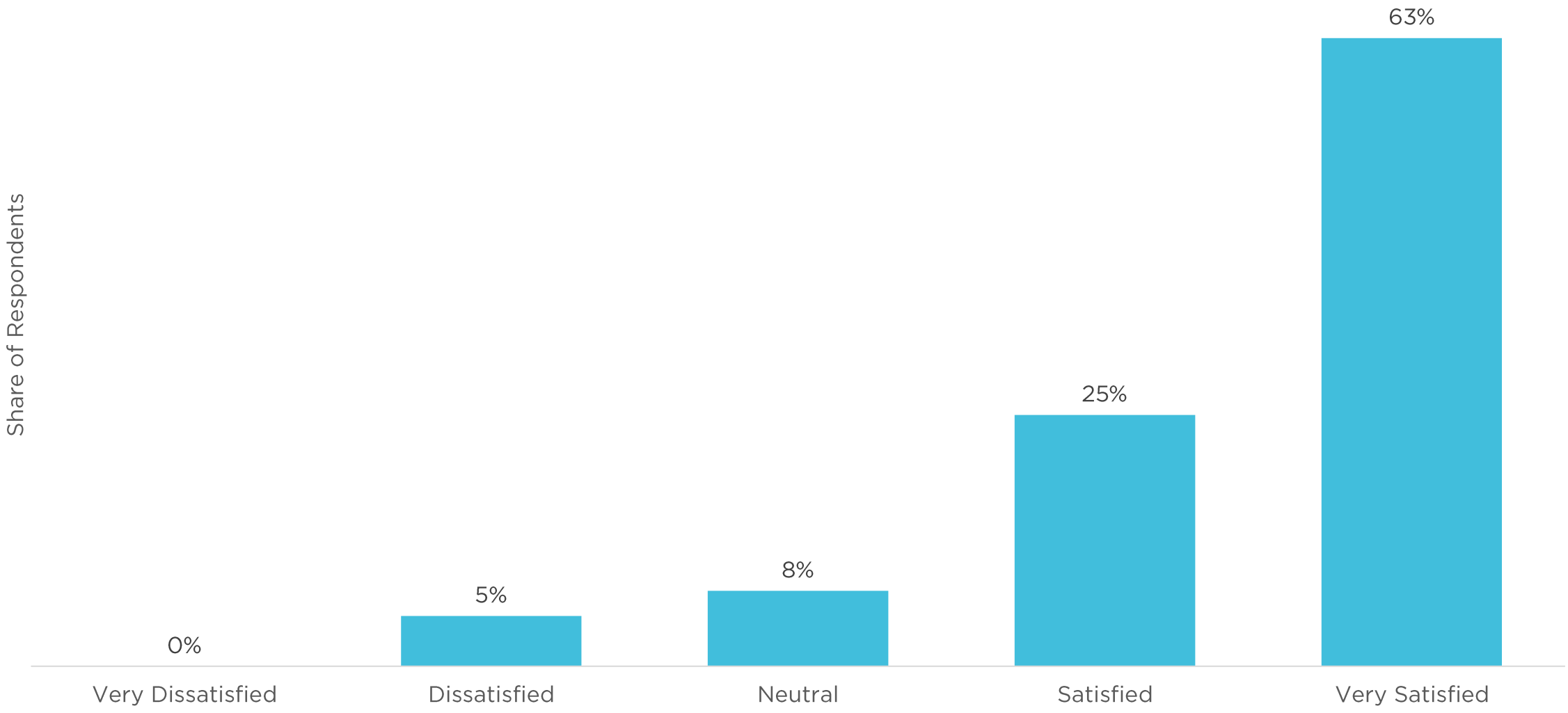
	Visitor Expenditure Per Person & Total
	Jul-Dec 24
Average Spend Prior to arrival	**USD**
Per Person Per Trip	2,589
Flowing into local economy rate – estimated *40%*	
Per Person Per Trip	1,036
Per Person per Day	176
Average Local Spend	
Length of Stay (nights)	*mean 6 nights*
Per Person Per Trip	1,196
Per Person per Day	199
Total Economic Impact-Per Trip	**2,232**
Total Economic Impact-Per Day	**372**

Report Structure



Visitor Overall Satisfaction

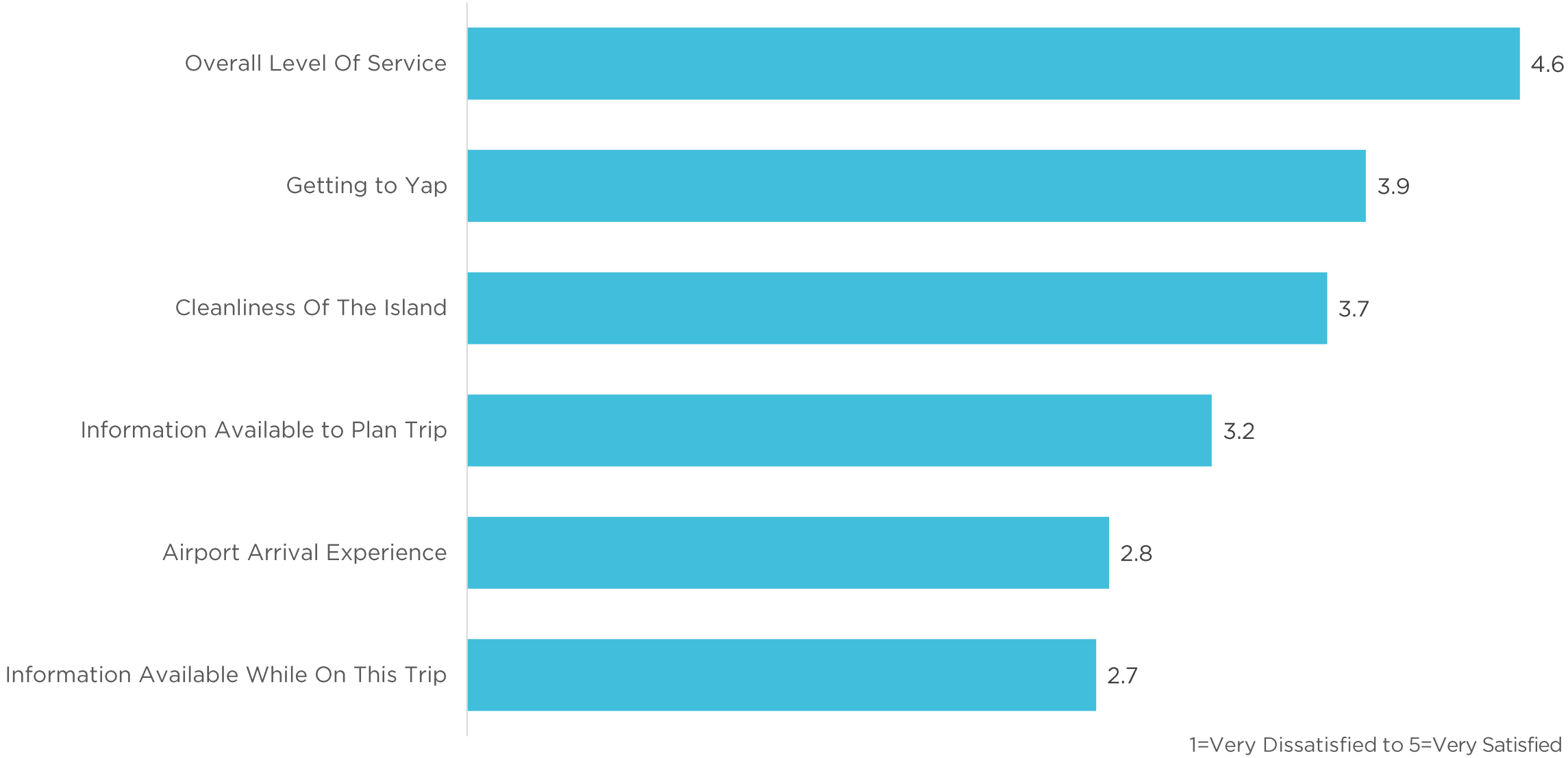
Avg. Overall Satisfaction
4.5



Note: Due to rounding, some totals do not sum to 100%

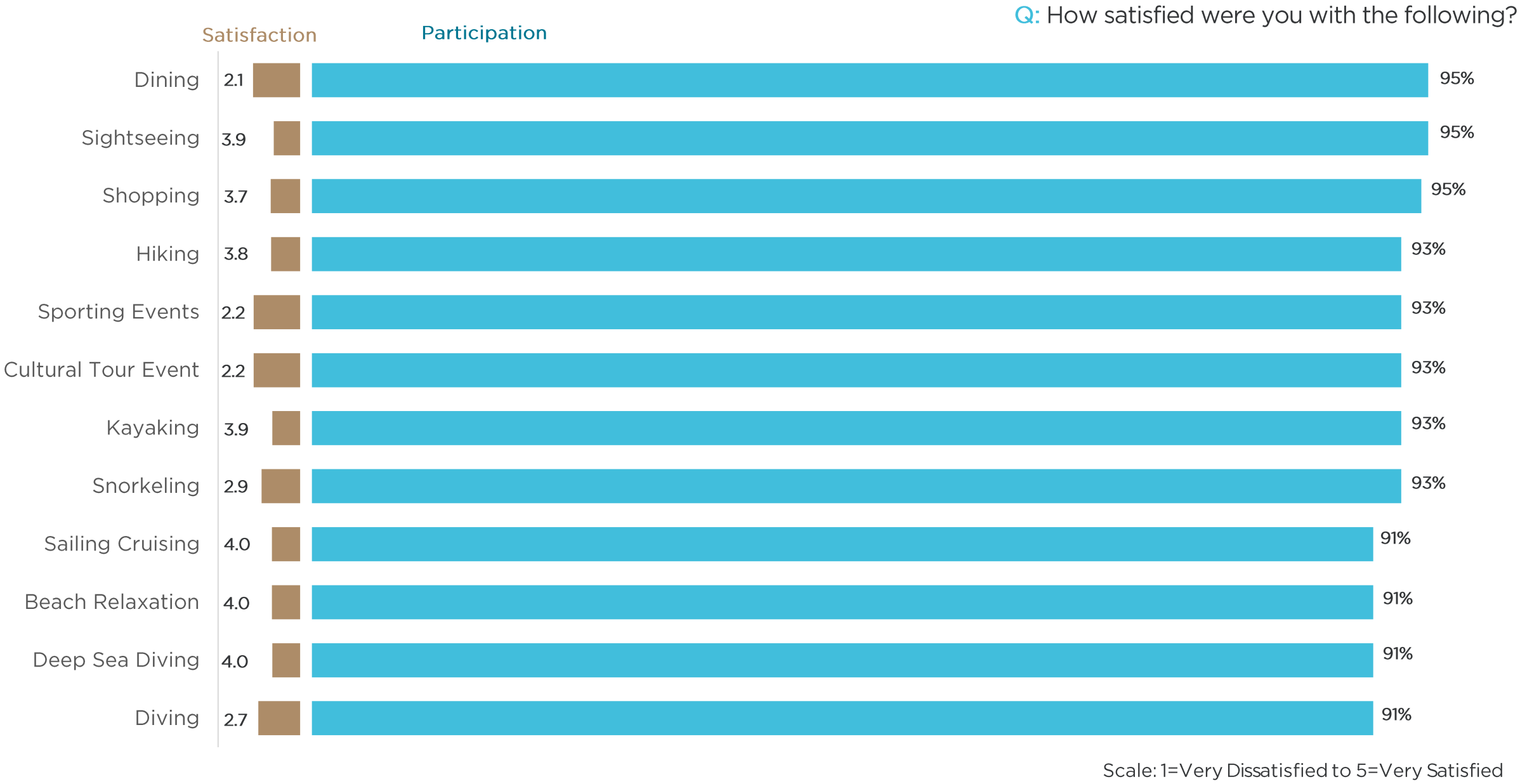
Satisfaction with Travel Experience

Q: How satisfied were you with the following?



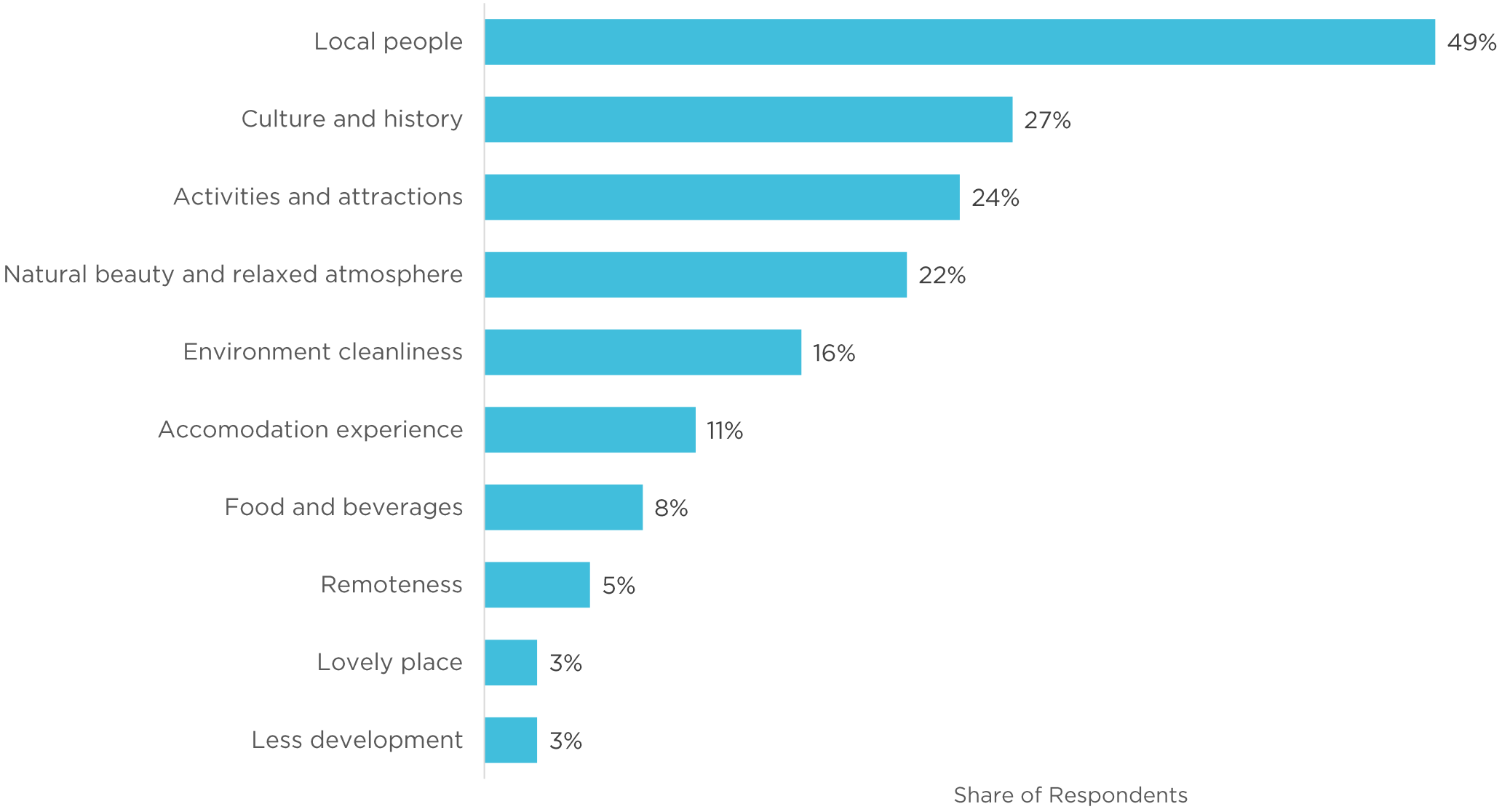
Note: The satisfaction rate is the average of all ratings given by respondents for that attribute.

Satisfaction with Activities



Note: Multiple responses, therefore total does not add up to 100%. Satisfaction is the average of all ratings given by respondents for that activity.

Most Appealing Aspects

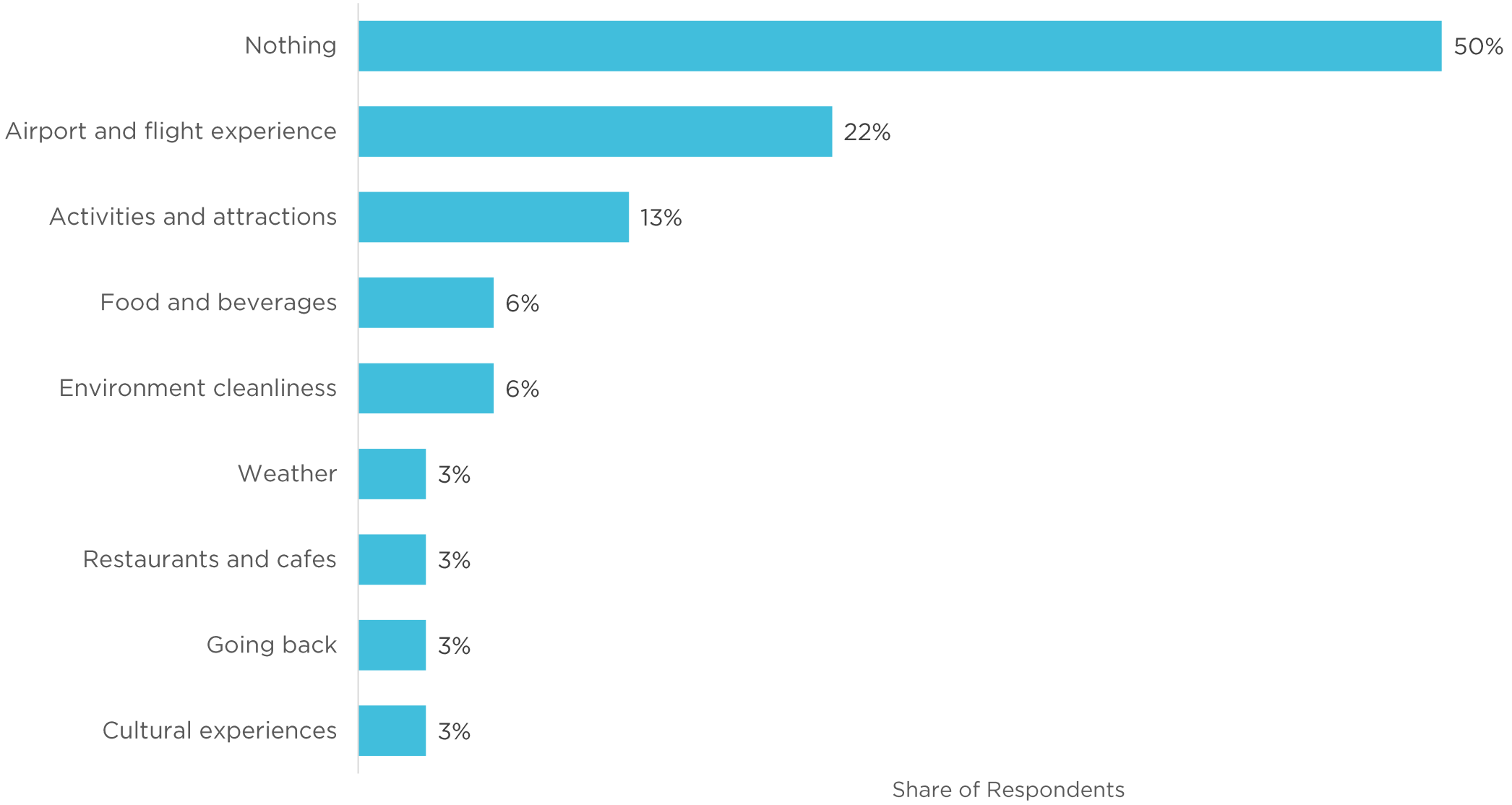


Note: Total response N=37. Multiple responses, therefore total does not add up to 100%

Quotes for Most Appealing Aspects of Yap

+ *Yap is a beautiful place with a rich culture.*
+ *Ulithi lodge was beautiful. Diving seems to be very popular though I did not participate.*
+ *The people! The mantas, mandarin fish and the fact that it's a quiet island far away from everything.*
+ *The people, Oceania food, snorkeling, diving.*
+ *The island is very beautiful and clean. I enjoyed the culture here as it was both beautiful and exotic.*
+ *Beautiful plants, manta rays, interesting and unique culture and history, very lovely friendly people.*
+ *Clean and great customer service from hotel to restaurants.*
+ *Clean idyllic island life. Calm and peaceful.*
+ *Culture and history.*
+ *For the most part, everyone is very friendly.*

Least Appealing Aspects

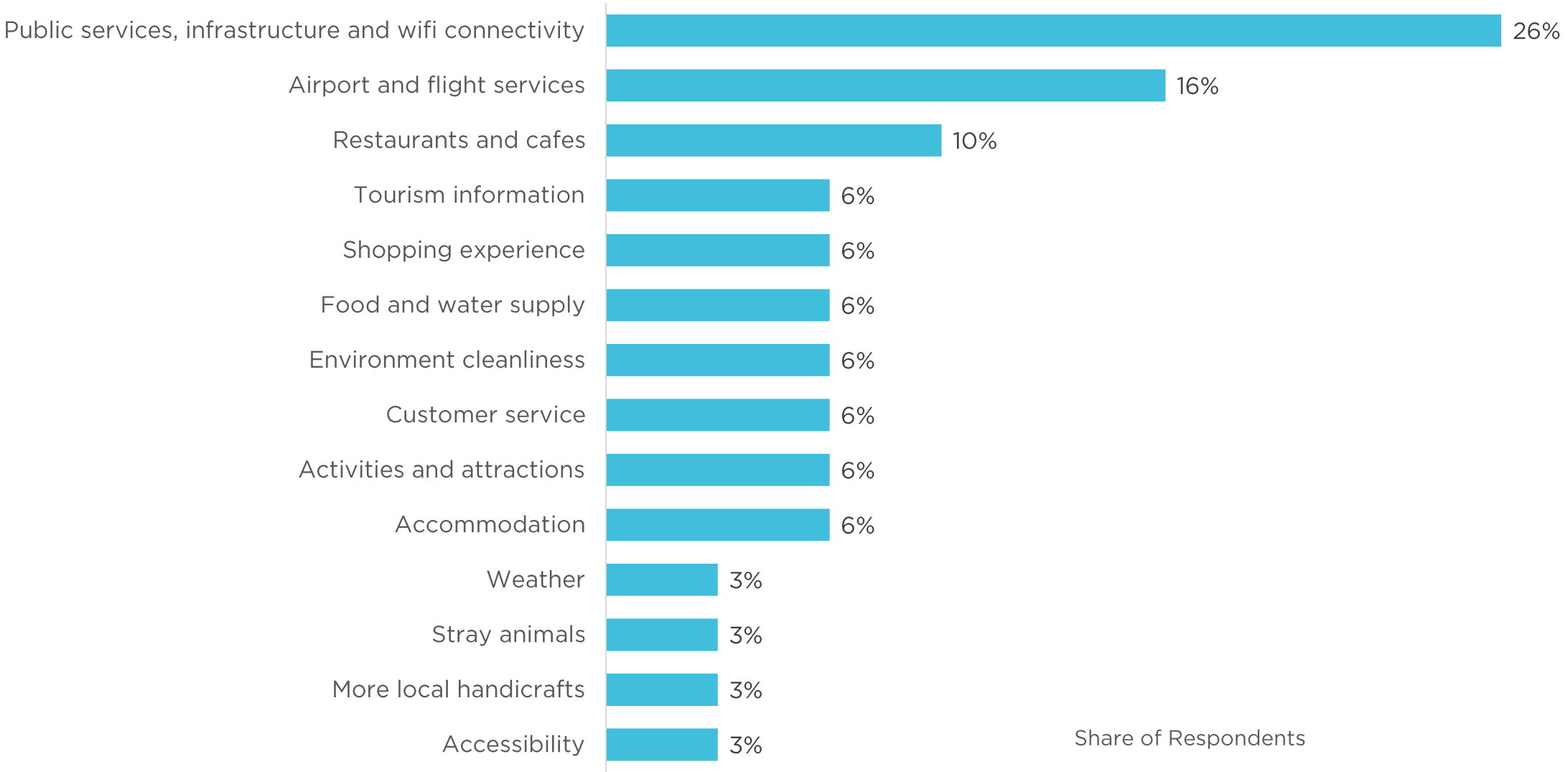


Note: Total response N=14. Multiple responses, therefore total does not add up to 100%

Quotes for Least Appealing Aspects of Yap

- *No public beaches.*
- *Limited flight options*
- *Lack of international food and facility*
- *Flights in middle of night*
- *Cancelled exit flight due to weather.*
- *You are known for Mantas, but they aren't that consistent here and there are many other places in the world to see them these days. I like Yap and will return but it does make the diving a little bit harder to pitch to friends given the alternatives . Nothing you can do about this but just wanted to provide background . Manta Ray Bay/Yap Divers are both great operations, but they don't control the mantas obviously.*

Suggestions for Improvement



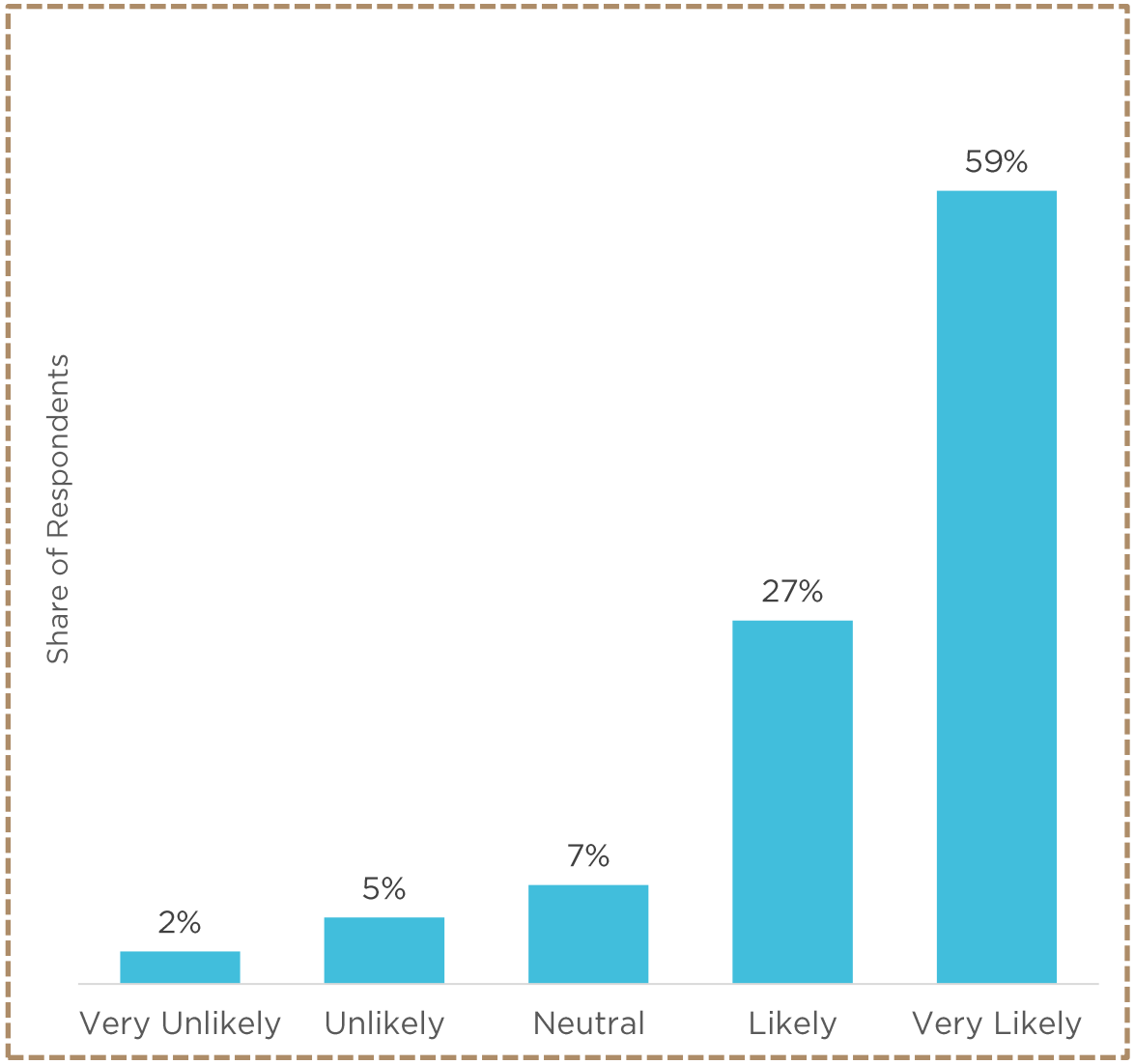
Note: Total response N=31. Multiple responses, therefore total does not add up to 100%

Quotes for Suggestions for Improvement

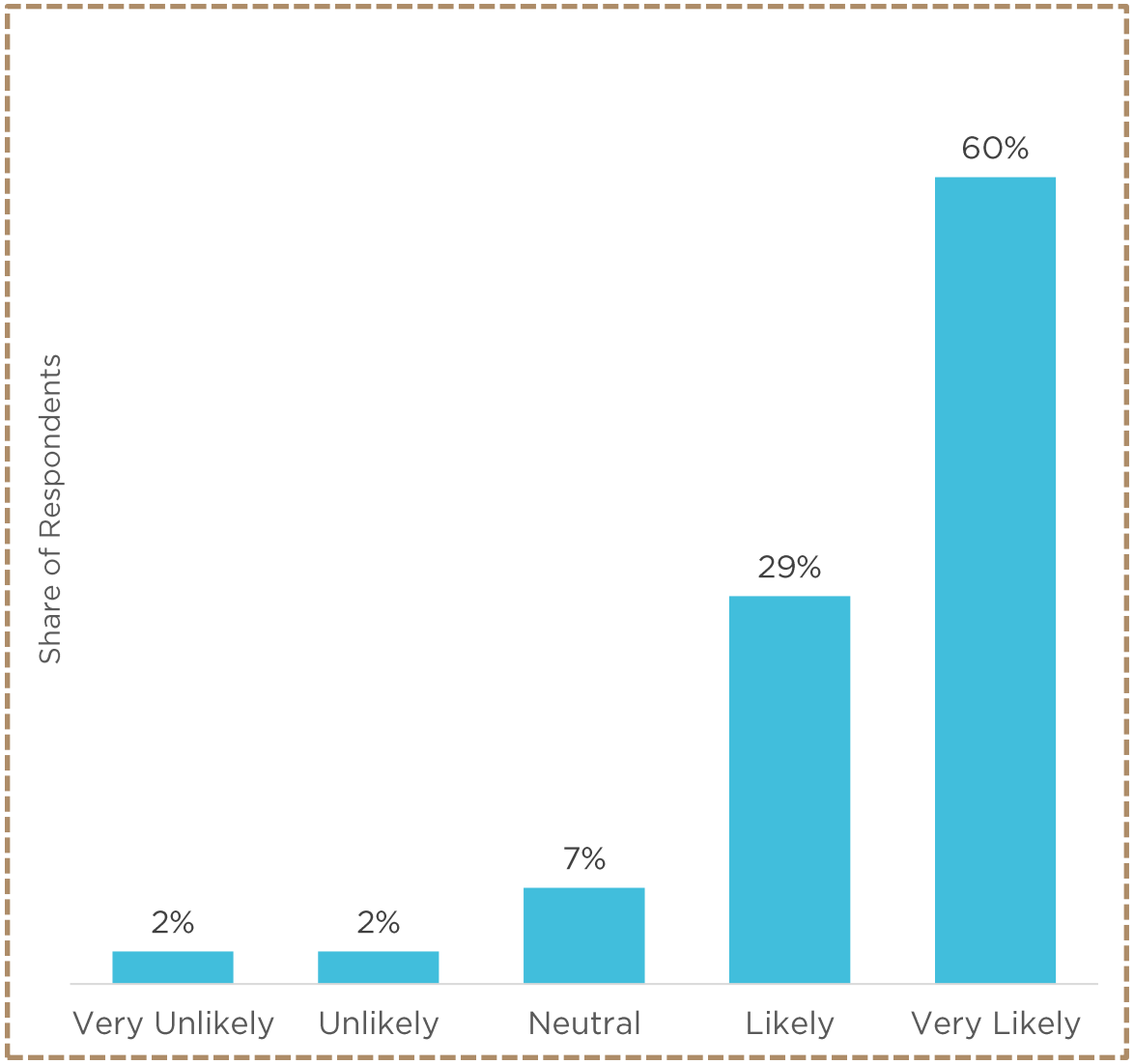
+ *The airport flight schedules!! Leaving at 2am is exhausting considering that Guam is not our destination.*
+ *Trash pickup near city, less reliance on bottled water in restaurants (encourage to use filtered tap)*
+ *Shopping, public transportation, informational materials for visitors.*
+ *Maybe more local handicrafts available and accessible for purchase.*
+ *Wi-fi is very spotty. Internet - only able to access from my hotel if I sit outside the front door.*
+ *If only there was data service that spans the whole island in that way I could share my experience live with family and friends back home.*
+ *Build water dam.*
+ *Upgrading of hotels.*
+ *Transportation system and road needs maintenance.*
+ *Shopping, public transportation, informational materials for visitors.*
+ *Pollution control, spay/neuter dogs and cats, flights to/from.*
+ *More eating places.*
+ *Information availability, flight frequency.*
+ *Commercial activities.*

Future Motivations

Q: How likely would you return to Yap?



Q: How likely would you recommend Yap?



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
Manatū Aorere

YAP VISITORS BUREAU
FEDERATED STATES OF MICRONESIA

This report was prepared at SPTO by the Pacific Tourism Data Initiative team in collaboration with the Yap Visitors Bureau and the New Zealand Government.

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