

INTERNATIONAL VISITOR SURVEY

PAPUA NEW GUINEA



Objective

1

Grow tourism arrivals to PNG by working with government and private sector to understand and develop arrivals markets.

Objective

2

Increase the value of tourism to businesses and communities by working with government and the private sector to improve the PNG tourism product.

Objective

3

Increase investment in PNG tourism by helping to build a pipeline of bankable projects.

Linkages: Complement the World Bank's PNG Tourism Sector Development Project to improve tourism services in the targeted destinations of East New Britain and Milne Bay.

IFC's work in Papua New Guinea is guided by the Papua New Guinea Partnership. Australia, New Zealand, and IFC are working together through the partnership to promote sustainable economic development, reduce poverty and stimulate private sector investment in Papua New Guinea.



IMPORTANCE OF THE INTERNATIONAL VISITOR SURVEY (IVS)



Provides unique insight to current tourism markets.



Creates a baseline from which government and industry stakeholders can **measure growth and track trends**.



Presents profiles of current visitors.



Increases **understanding of travel patterns** in the PNG provinces and regions.



Provides data to inform marketing strategies including key market segments, distribution channels and motivation factors.



Allows for businesses and government to make **evidence-based decisions** for marketing, product development, policy and strategies.



The database grows over time enabling further data mining and the addition of new themes.



INTERNATIONAL VISITOR SURVEY

TOTAL VISITOR DATA

JANUARY 2018 – JUNE 2018



DATA FROM 6 MONTHS

USD 78M

TOTAL SPEND USD

PGK 260M

TOTAL SPEND PGK

34,649

TOTAL VISITORS

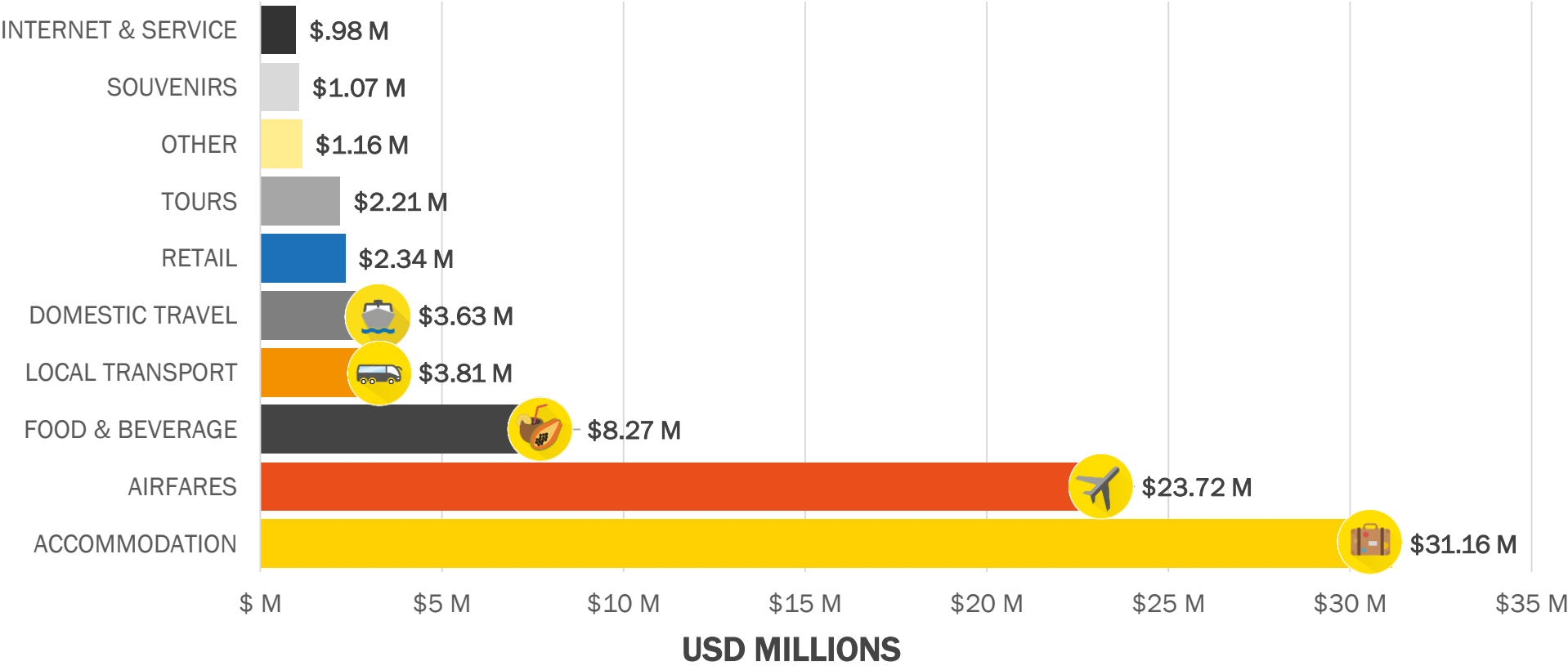
USD 2,262
PGK 7496

PER VISITOR
PER TRIP

USD 236
PGK 782

PER VISITOR
PER DAY

SPEND IN COUNTRY AND PRIOR TO ARRIVAL

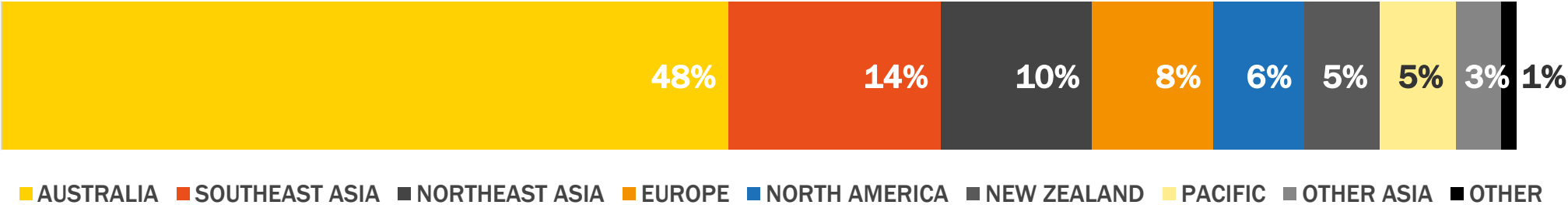


Accommodation and international airfares dominate visitor spend. Visitor spending on food & beverage, retail and tours is an important link to the local economy.

TOTAL VISITORS BY MARKET

JANUARY – JUNE 2018 TOTAL VISITORS

TOTAL VISITORS (%) BY MARKET



PURPOSE OF VISIT

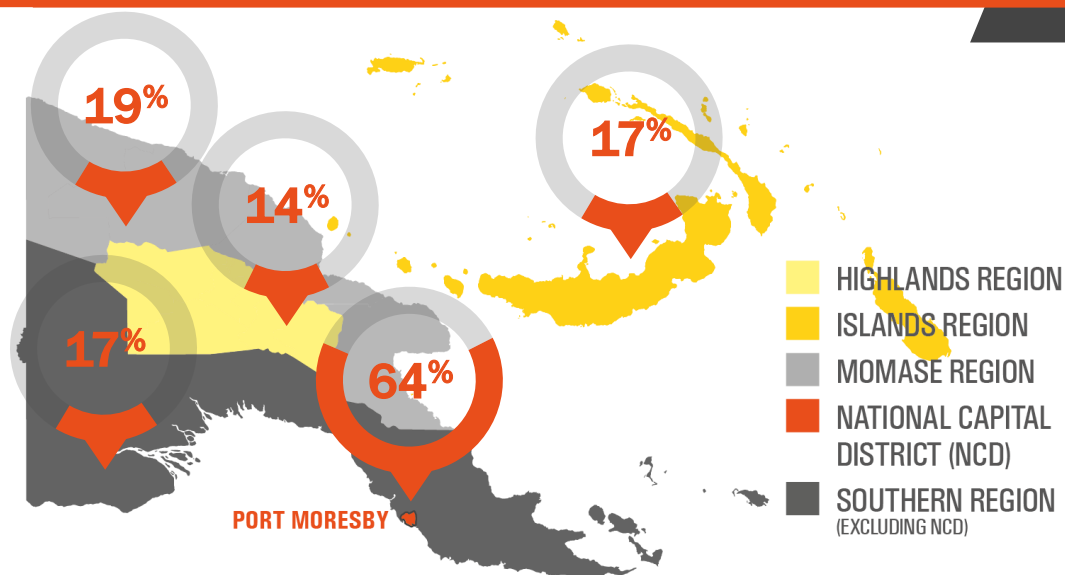
SPEND PER PERSON PER TRIP



PNG is reliant on the Australian market and business tourists. PNG has a holiday market gap with other Pacific destinations receiving 70% of visitors for holiday purposes compared to 30% in PNG.

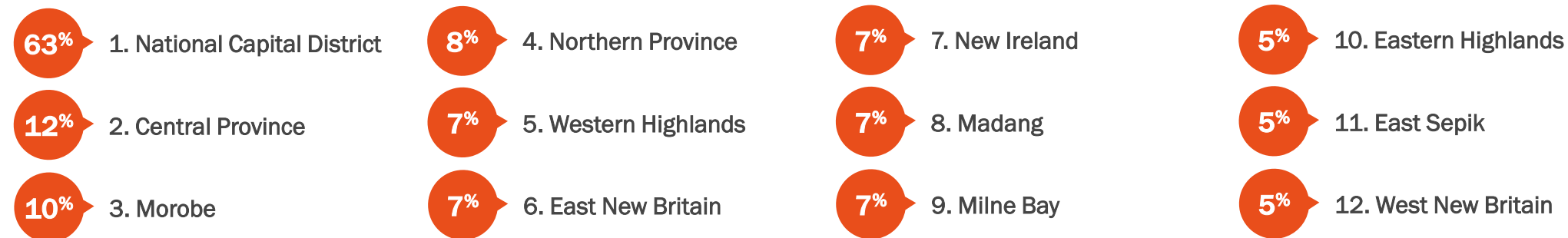
REGIONS VISITED & VISITOR SATISFACTION

JANUARY – JUNE 2018 TOTAL VISITORS



TOTAL VISITATION TO THE PROVINCES

JANUARY 2017 – JUNE 2018 TOTAL VISITORS



While visitation to Port Moresby is the highest, there is an opportunity to encourage more visitors to regions and provinces. Interest in returning remains high at 93% of total visitors.



INTERNATIONAL VISITOR SURVEY

HOLIDAY MARKET PROFILES

JANUARY 2017 – JUNE 2018



DATA FROM 18 MONTHS



JAN 2017 – JUN 2018

AUSTRALIA

52%
OF HOLIDAY
VISITORS

14,845

TOTAL VISITORS

USD 35M

TOTAL SPEND USD

PGK 116M

TOTAL SPEND PGK

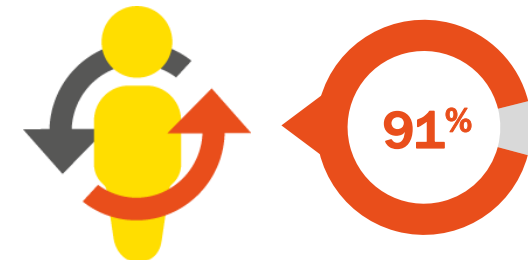
AVERAGE LENGTH OF STAY



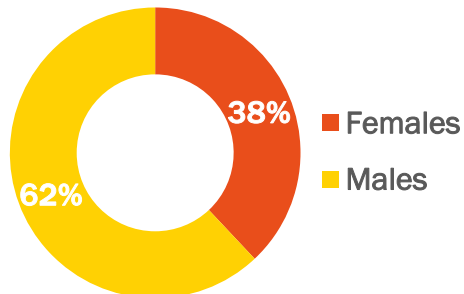
SPEND



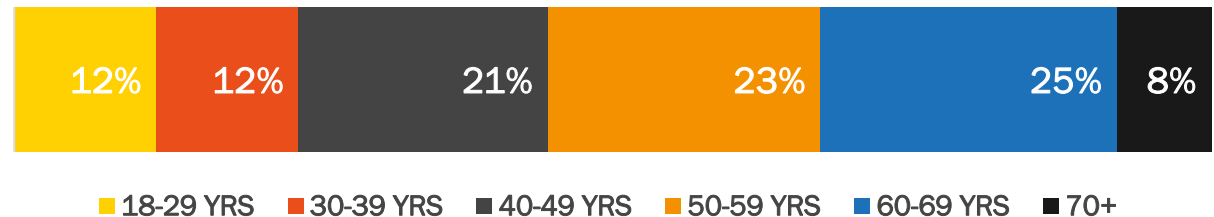
WOULD RETURN



GENDER



AGE



The Australian market is predominately a mature, male market with most visitors between the ages of 40 and 70 years. Visitors have slightly lower spend than the average holiday spend per trip.



JAN 2017 – JUN 2018

AUSTRALIA

52%
OF HOLIDAY
VISITORS



TOP 5 PROVINCES VISITED

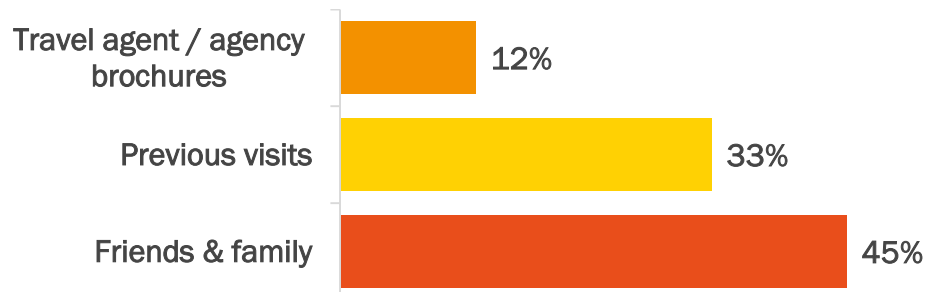
- 47% 1. National Capital District
- 30% 2. Central Province
- 26% 3. Northern Province
- 12% 4. New Ireland
- 9% 5. East New Britain



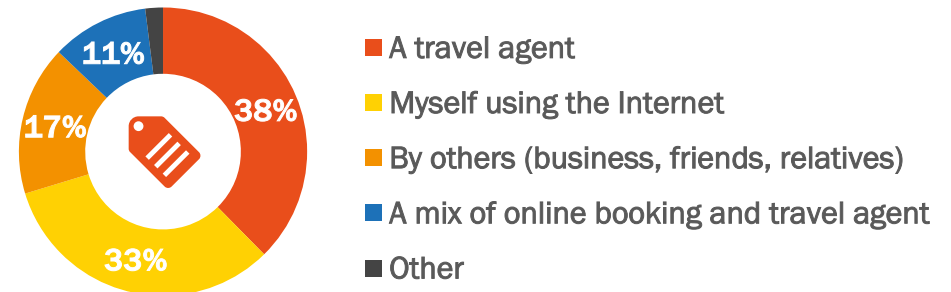
TOP 10 ACTIVITIES

- 61% 1. Local markets
- 56% 2. Visited villages
- 54% 3. Visiting the beach
- 54% 4. Swimming
- 49% 5. WWII history related tours
- 48% 6. Sightseeing
- 44% 7. Hiking and walking
- 40% 8. Kokoda Trail
- 33% 9. Local dance and music
- 29% 10. Snorkelling

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



While the market is mature, they are interested in active and adventure holidays. With a high interest in returning, the key is to develop itineraries to encourage them to travel beyond NCD and Central Province.

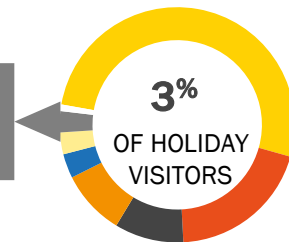
Note:

- Multiple responses, therefore totals do not add up to 100%



JAN 2017 – JUN 2018

NEW ZEALAND



836

TOTAL VISITORS

USD 1.7M

TOTAL SPEND USD

PGK 5.7M

TOTAL SPEND PGK

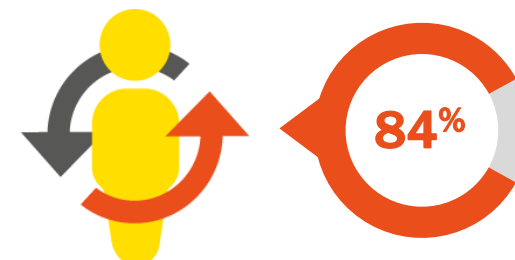
AVERAGE LENGTH OF STAY



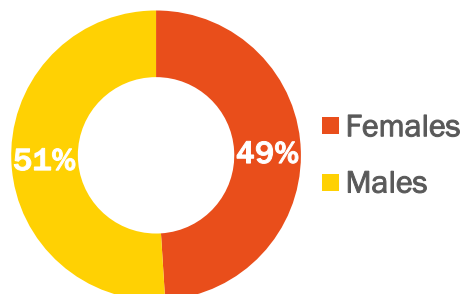
SPEND



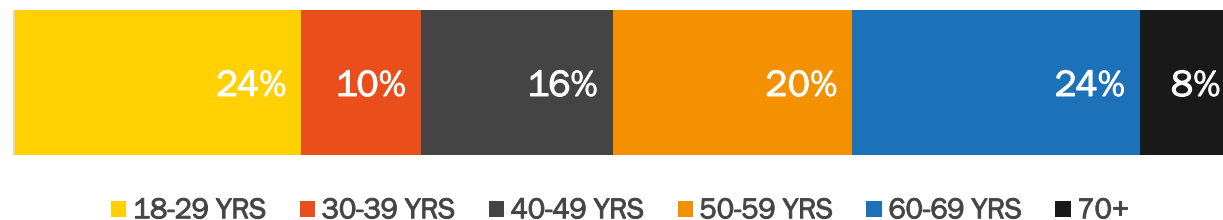
WOULD RETURN



GENDER



AGE

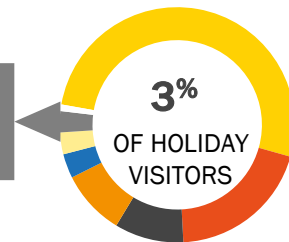


New Zealand has a split market with a grouping of younger travelers and a grouping of older travelers. There is potential for the young, adventurous New Zealand market to increase interest among younger travelers in others markets.

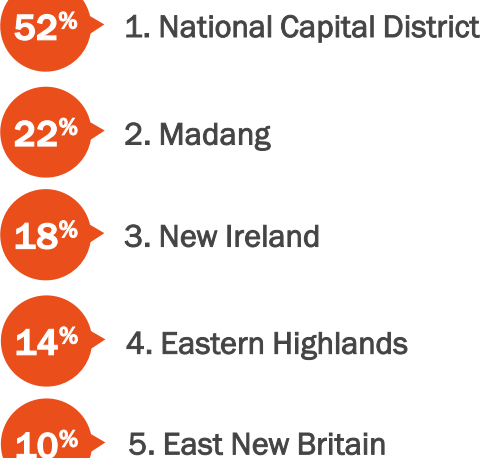


JAN 2017 – JUN 2018

NEW ZEALAND



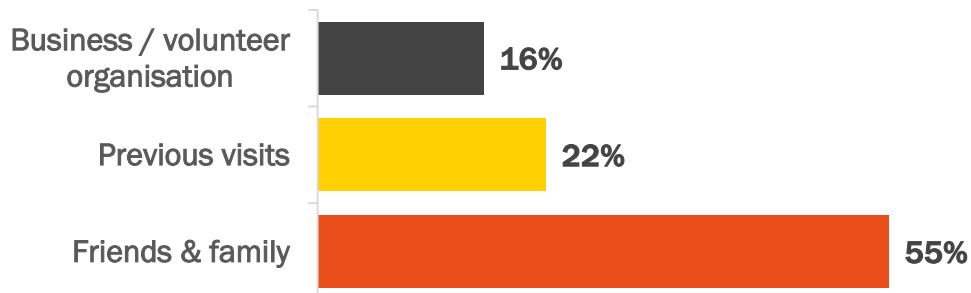
TOP 5 PROVINCES VISITED



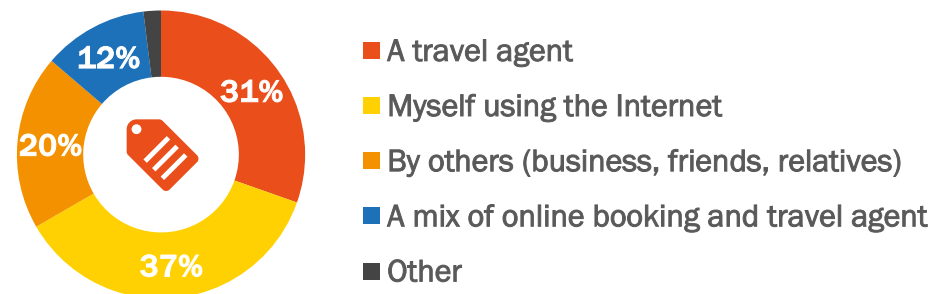
TOP 10 ACTIVITIES



HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



New Zealanders are adventurous travelers with a focus on water based activities. They are more independent and do not rely on travel agents to find out about PNG and book their trips.

Note:

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JAN 2017 – JUN 2018

NORTH AMERICA



2,580

TOTAL VISITORS

USD 10.8M

TOTAL SPEND USD

PGK 35.9M

TOTAL SPEND PGK

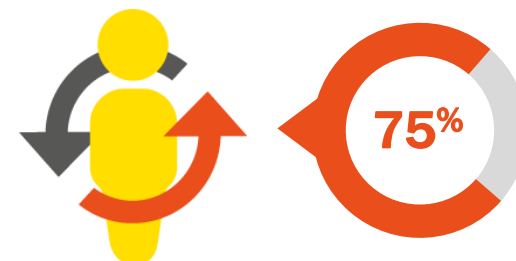
AVERAGE LENGTH OF STAY



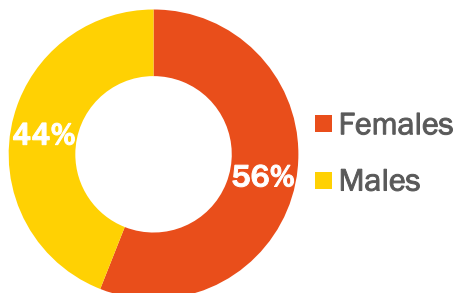
SPEND



WOULD RETURN



GENDER



AGE

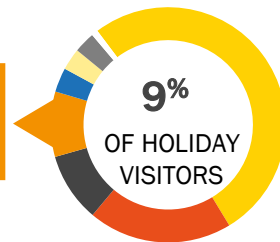


The North America market is the highest yielding and oldest market for PNG. With low rates of interest in returning, PNG is a once-in-a-lifetime destination. Given the older demographic, accessibility is likely a concern for this market.



JAN 2017 – JUN 2018

NORTH AMERICA



TOP 5 PROVINCES VISITED

50% 1. National Capital District

31% 2. Western Highlands

22% 3. East Sepik

17% 4. Milne Bay

17% 5. West New Britain



TOP 10 ACTIVITIES

71% 1. Local markets

65% 2. Sightseeing

60% 3. Visited villages

54% 4. Hiking and walking

53% 5. Local dance and music

52% 6. Diving

48% 7. Visiting the beach

45% 8. Snorkelling

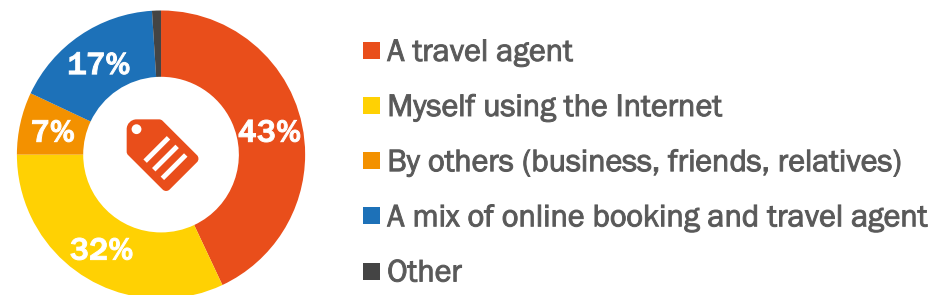
45% 9. Birdwatching

42% 10. Cultural Tours

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Cultural activities are important for North American visitors while adventurous activities have lower levels of participation. Travel agents play an important role in marketing the destination and booking travel.

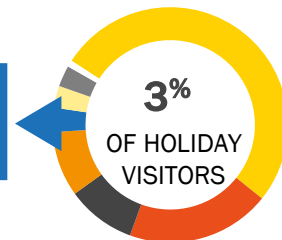
Note:

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JAN 2017 – JUN 2018

PACIFIC



961

TOTAL VISITORS

USD 2M

TOTAL SPEND USD

PGK 6.7M

TOTAL SPEND PGK

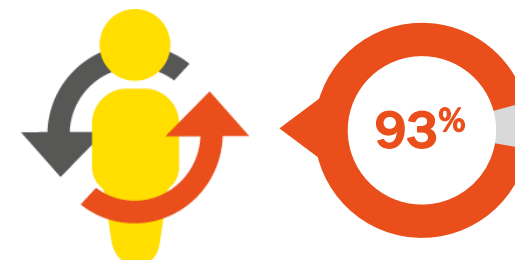
AVERAGE LENGTH OF STAY



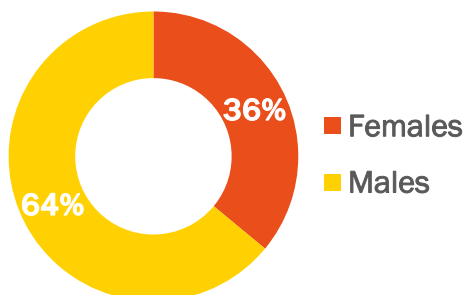
SPEND



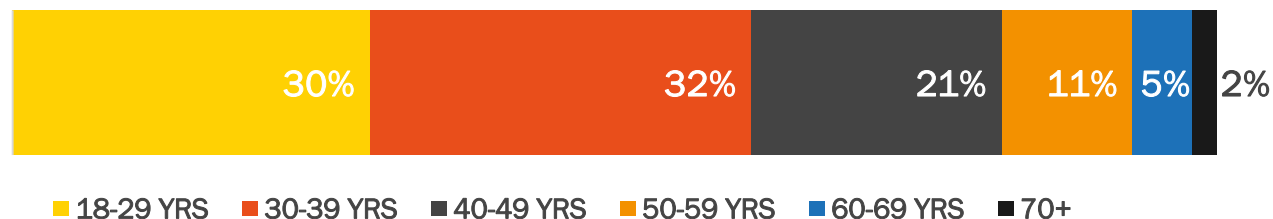
WOULD RETURN



GENDER



AGE

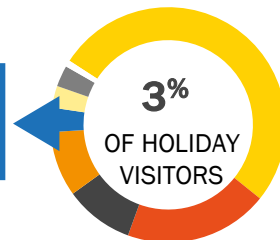


The Pacific holiday market is a young market, reflecting the demographics of the region. Overall, a small holiday market for PNG representing only 3% of holiday visitors.



JAN 2017 – JUN 2018

PACIFIC



TOP 5 PROVINCES VISITED

67% 1. National Capital District

12% 2. Central Province

10% 3. Morobe

7% 4. East New Britain

7% 5. Eastern Highlands



TOP 10 ACTIVITIES

78% 1. Visiting the beach

70% 2. Local markets

60% 3. Sightseeing

46% 4. Port Moresby
Nature Park

33% 5. Swimming

27% 6. Local dance and
music

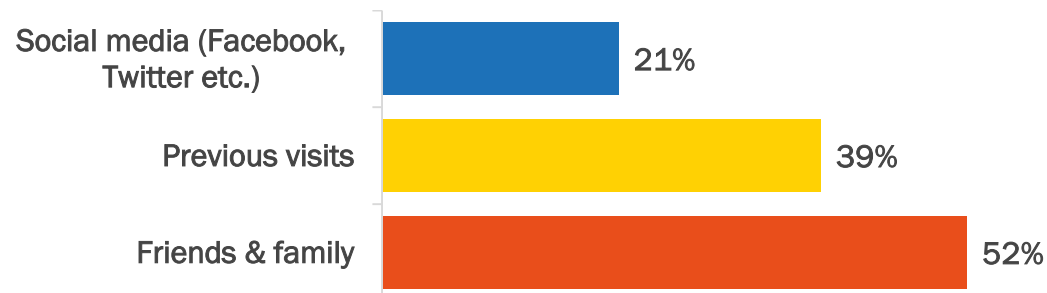
26% 7. Parks, nature reserves
and animal sanctuaries

24% 8. Local language and
art

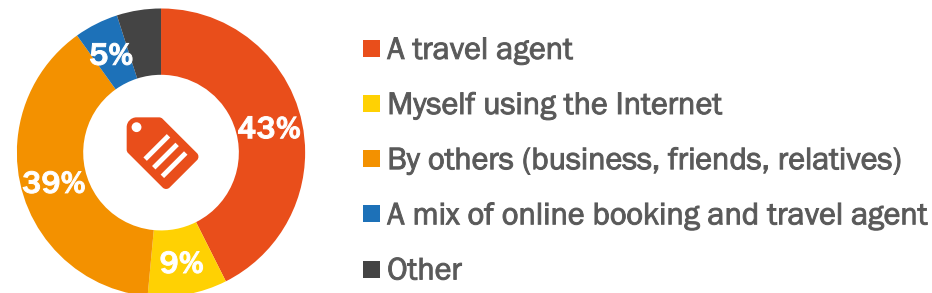
23% 9. Sports related
activities

22% 10. Museums

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Provinces visited and activity participation indicate that most Pacific travelers stick close to Port Moresby. Social media plays an important role in the dissemination of information about PNG around the region.

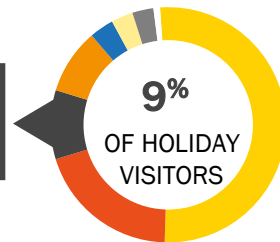
Note:

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JAN 2017 – JUN 2018

EUROPE (EXCLUDING UK)



2,731

TOTAL VISITORS

USD 10M

TOTAL SPEND USD

PGK 33.3M

TOTAL SPEND PGK

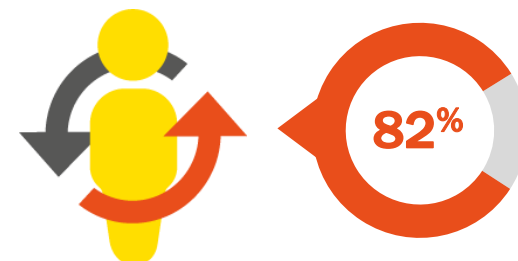
AVERAGE LENGTH OF STAY



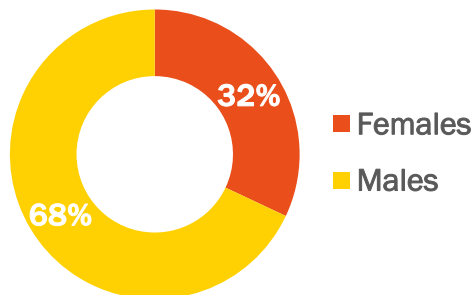
SPEND



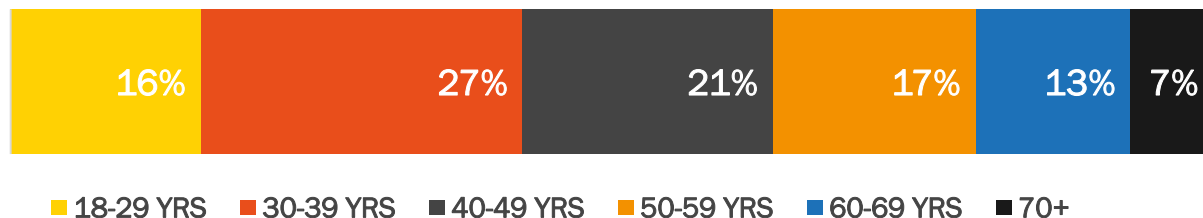
WOULD RETURN



GENDER



AGE

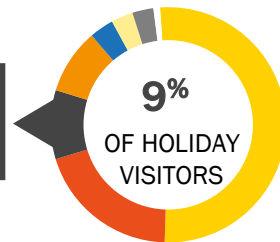


The high yielding European holiday market has the longest average length of stay in PNG. The lower age range and high percent of male travelers indicates a trend toward adventure travel.



JAN 2017 – JUN 2018

EUROPE (EXCLUDING UK)



TOP 5 PROVINCES VISITED

43% 1. National Capital District

36% 2. Western Highlands

31% 3. East Sepik

31% 4. Madang

26% 5. East New Britain



TOP 10 ACTIVITIES

85% 1. Local markets

81% 2. Visiting the beach

65% 3. Sightseeing

61% 4. Swimming

61% 5. Visiting villages

60% 6. Snorkelling

55% 7. Local dance and music

50% 8. Hiking and walking

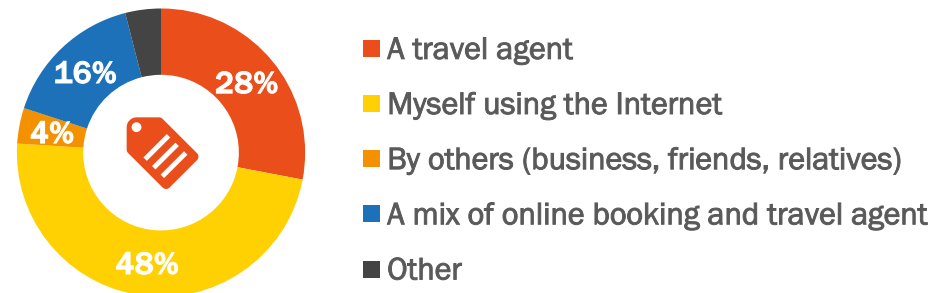
40% 9. Museums

40% 10. Cultural tours

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



European travelers prefer independent travel using travel books and the internet to find new destinations and book travel online. Ensuring information on PNG is available online, in multiple languages is important.

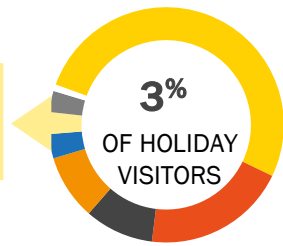
Note:

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JAN 2017 – JUN 2018

UK



864

TOTAL VISITORS

USD 3.4M

TOTAL SPEND USD

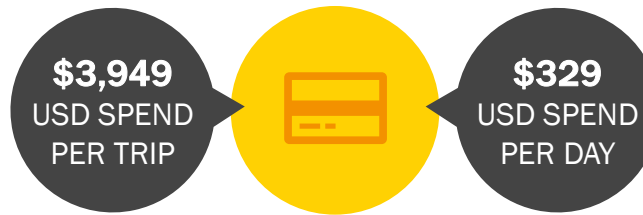
PGK 11.3M

TOTAL SPEND PGK

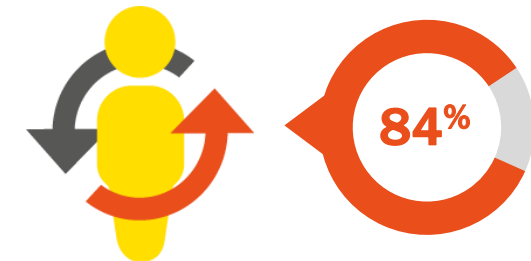
AVERAGE LENGTH OF STAY



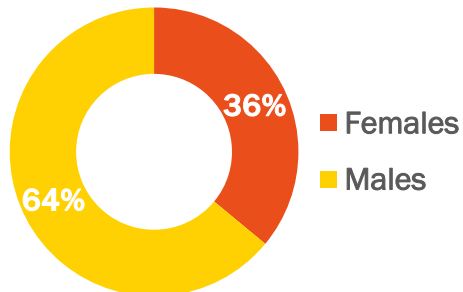
SPEND



WOULD RETURN



GENDER



AGE

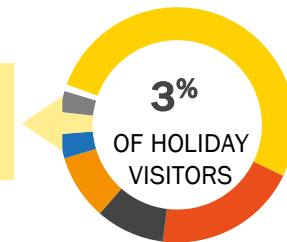


The UK is a high yield, mature market with most tourists between 40 and 69 years of age. A bias towards men offers opportunities to create targeted marketing campaigns for female tourists to encourage them to visit.



JAN 2017 – JUN 2018

UK



TOP 5 PROVINCES VISITED

52% 1. National Capital District

26% 2. Western Highlands

24% 3. East Sepik

22% 4. Central Province

20% 5. West New Britain



TOP 10 ACTIVITIES

62% 1. Local markets

59% 2. Visiting the beach

59% 3. Visiting villages

52% 4. Snorkelling

52% 5. Swimming

48% 6. Birdwatching

47% 7. Local dance and music

45% 8. Hiking and walking

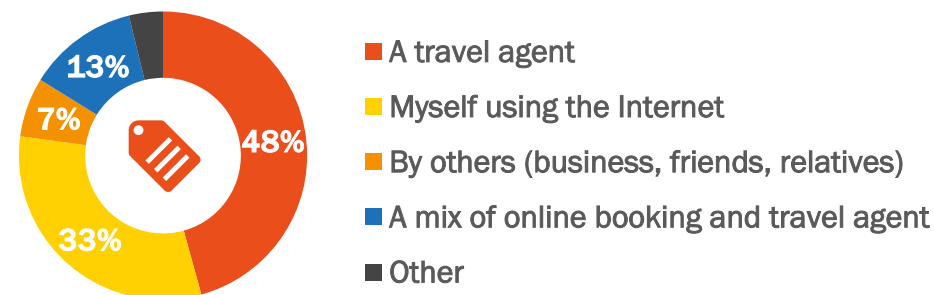
43% 9. Sightseeing

41% 10. Parks, nature reserves and animal sanctuaries

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



UK holiday visitors have a focus on nature based activities in PNG with high rates of participation in birdwatching. Travelers have a mixed profile of independent booking and using travel agents.

Note:

- Multiple responses, therefore totals do not add up to 100%



JAN 2017 – JUN 2018

ASIA

China, Hong Kong, India, Indonesia, Japan, Malaysia, Nepal, Philippines, Singapore, Thailand



5,696

TOTAL VISITORS

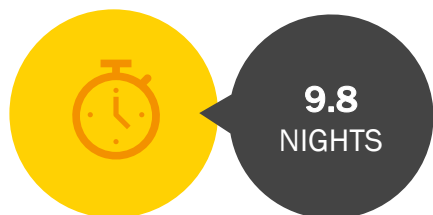
USD 11.5M

TOTAL SPEND USD

PGK 38M

TOTAL SPEND PGK

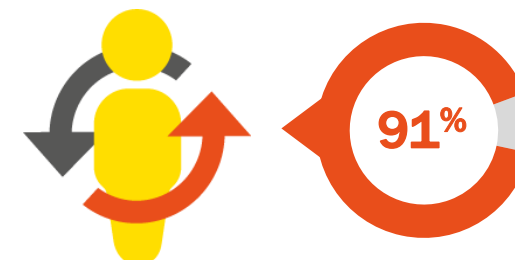
AVERAGE LENGTH OF STAY



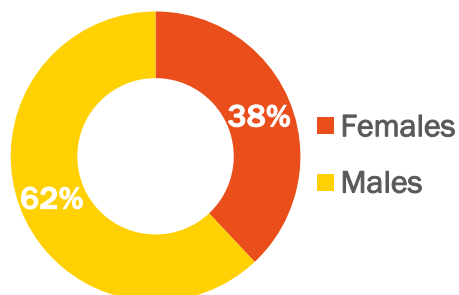
SPEND



WOULD RETURN



GENDER



AGE



The Asian holiday traveler to PNG is generally younger with lower levels of spending. More responses are needed to fully explore data on individual source markets.



JAN 2017 – JUN 2018

ASIA



(China, Hong Kong, India, Indonesia, Japan, Malaysia, Nepal, Philippines, Singapore, Thailand)



TOP 5 PROVINCES VISITED

57% 1. National Capital District

13% 2. West New Britain

9% 3. East New Britain

9% 4. Western Highlands

9% 5. Northern Province



TOP 10 ACTIVITIES

77% 1. Local markets

57% 2. Visiting the beach

46% 3. Sightseeing

44% 4. Port Moresby Nature Park

41% 5. Diving

32% 6. Visiting villages

30% 7. Swimming

28% 8. Parks, nature reserves and animal sanctuaries

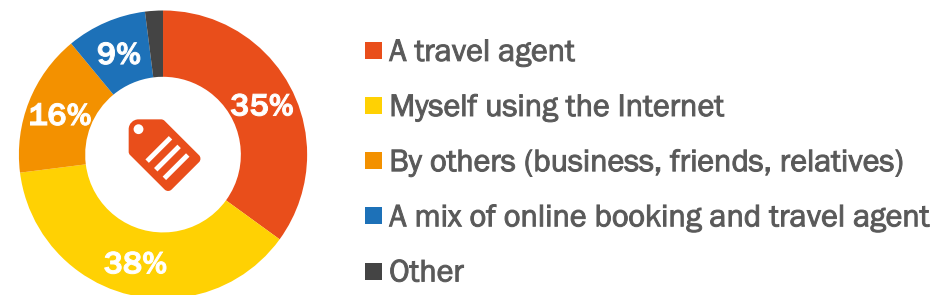
28% 9. Museums

26% 10. WWII history related tours

HOW DID YOU FIND OUT ABOUT PNG? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Diving is an important activity for Asian travelers to PNG. There is a potential to increase dive and WWII tourists to visit PNG with new twice weekly flight from Japan.

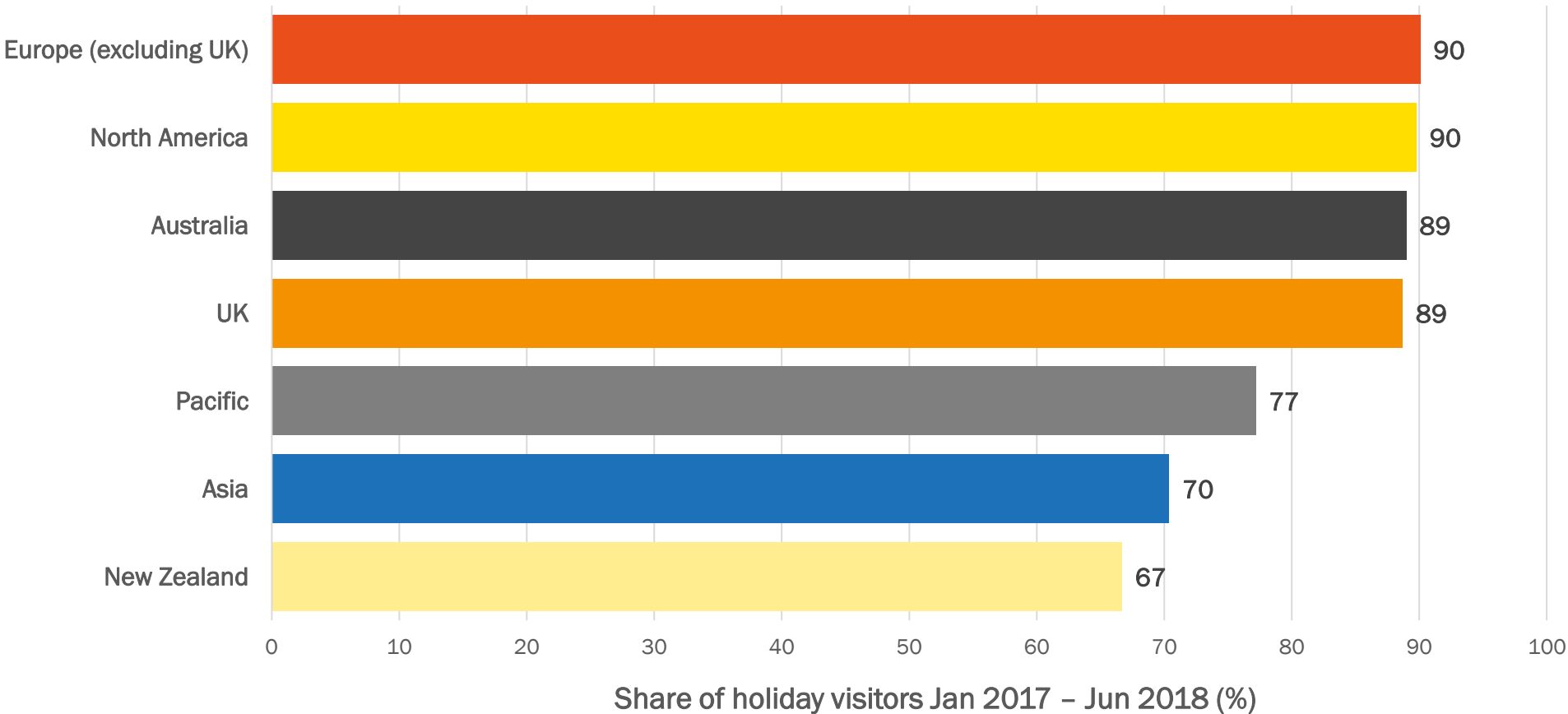
Note:

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JAN 2017 – JUN 2018

OVERALL SATISFACTION BY MARKET*



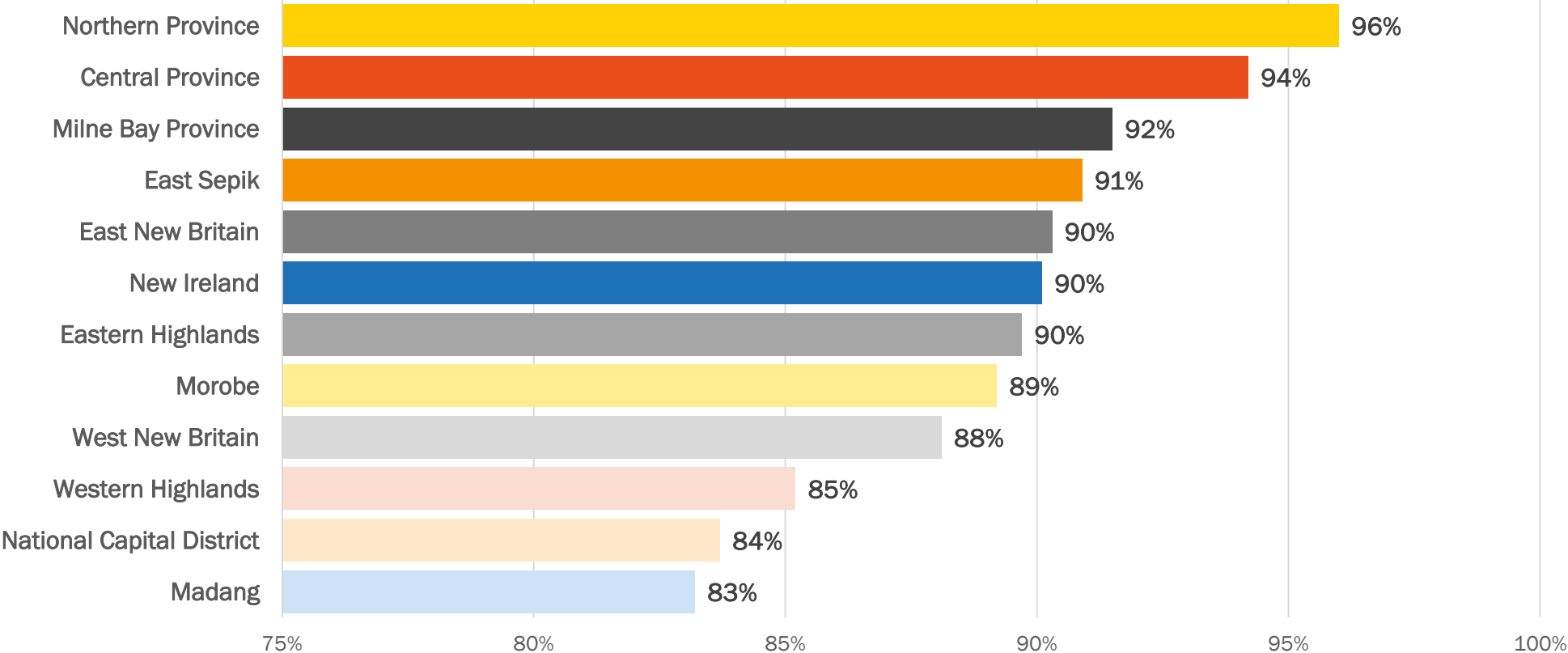
*A satisfied visitor includes respondents who answered 'satisfied' or 'very satisfied'

The markets with the highest levels of satisfaction are those with the highest yield and highest levels of travel to provinces outside of NCD.



JAN 2017 – JUN 2018

OVERALL SATISFACTION BY PROVINCE VISITED



SHARE OF HOLIDAY VISITORS JAN 2017 – JUN 2018 (%)

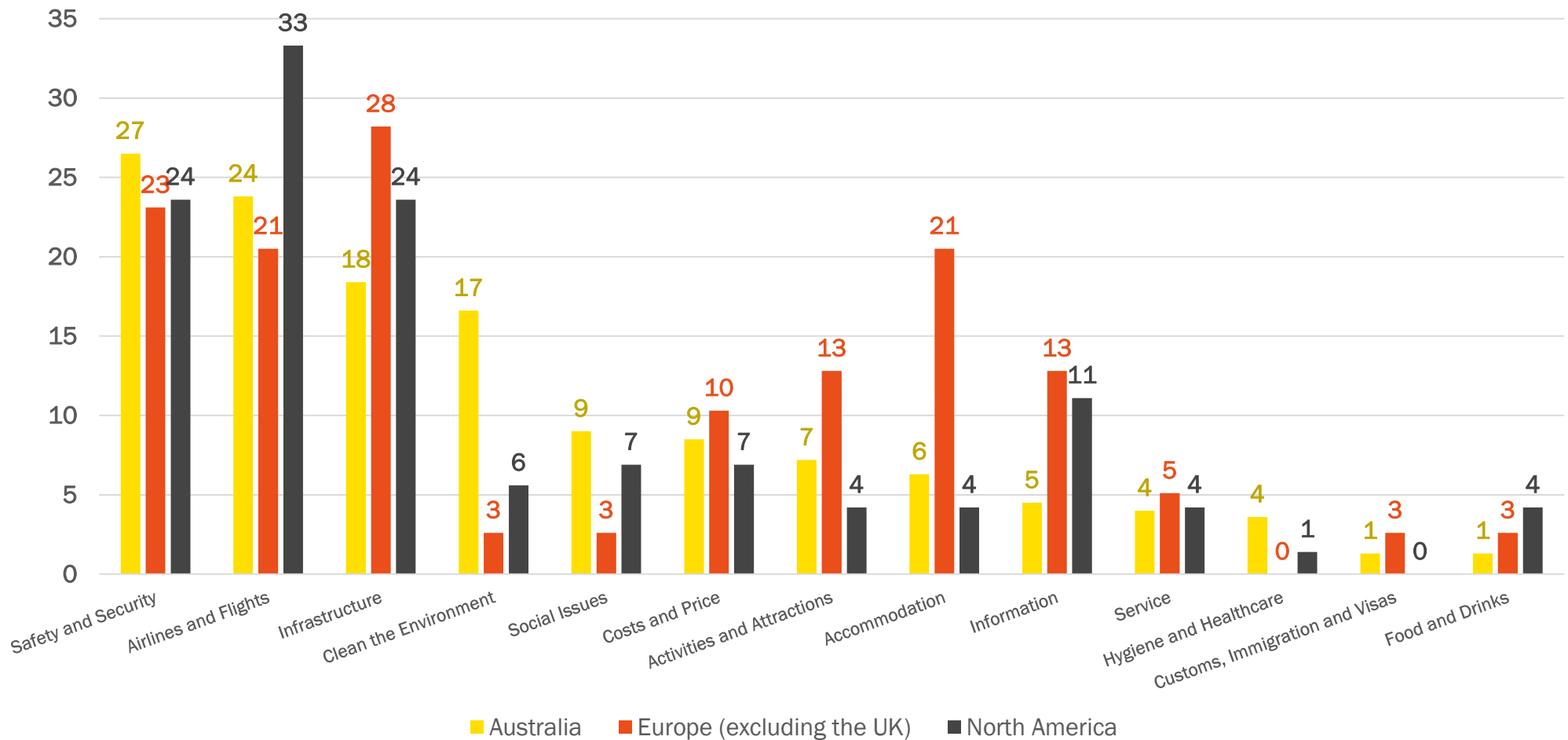
*A satisfied visitor includes respondents who answered 'satisfied' or 'very satisfied'

The key tourism destinations prioritized by government have the highest levels of visitor satisfaction. Destinations with lower levels of satisfaction may face issues of safety and security or fading accommodation stock.



JAN 2017 – JUN 2018

IMPROVEMENTS SUGGESTED BY MARKET



The European adventure market seeks value for money accommodation, sufficient information for independent planning, and formalized attractions. North Americans stay longer and travel throughout the country, encountering more challenges with flights.

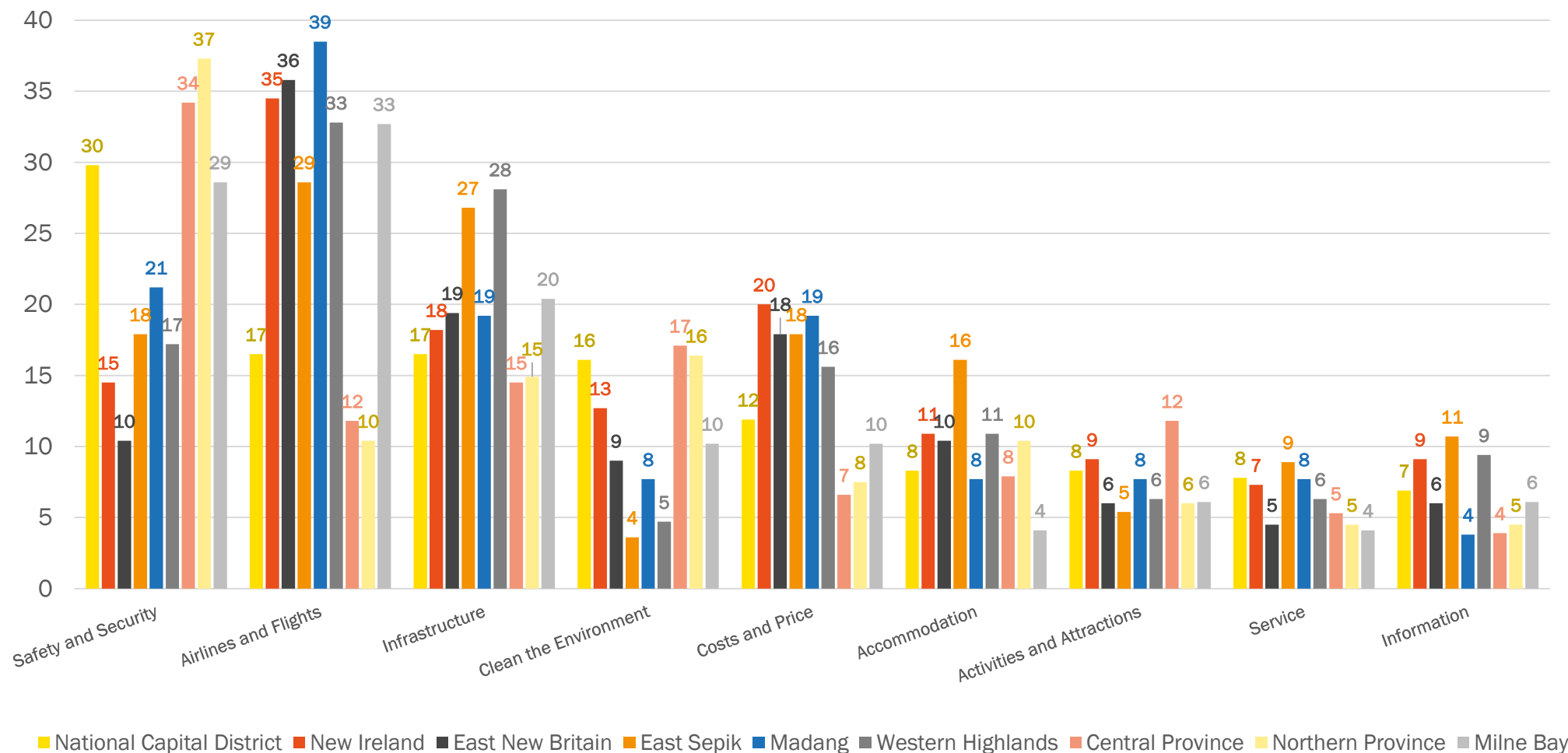
Note:

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JAN 2017 – JUN 2018

IMPROVEMENTS BY PROVINCE VISITED



In provinces where safety and security is not an issue, airlines and flights dominate as a specific challenge. Opportunity to develop more activities in Central Province to add on to Kokoda Track experience.

Note:

- Multiple responses, therefore totals do not add up to 100%



Thank You



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