

Papua New Guinea International Visitor Survey



January – June 2017

Simon Milne

AUT



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Summary of the Key Findings

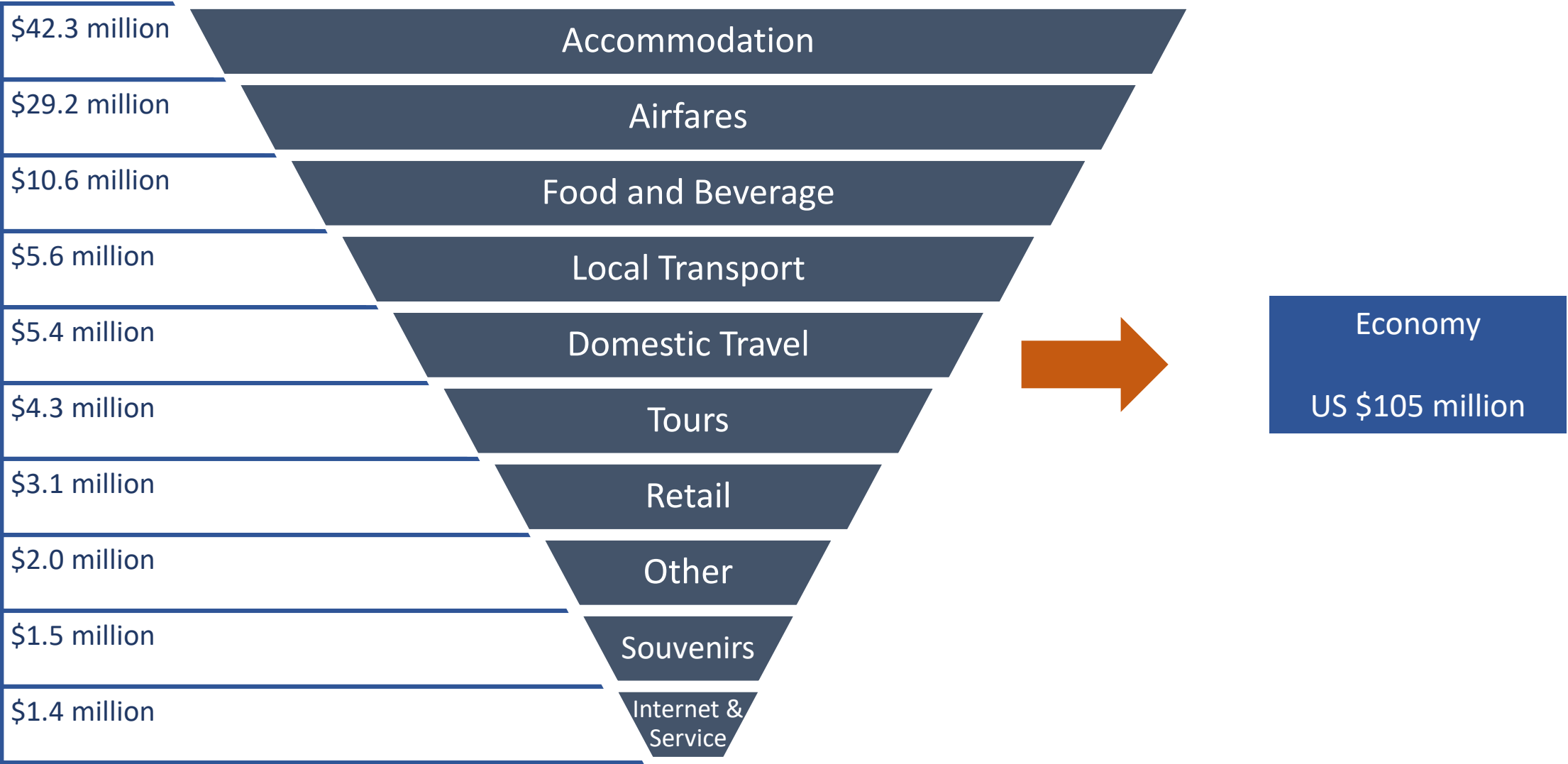
Total Direct Economic Impact for Jan-Jun 2017

Figures exclude employment and cruise visitors

US \$105 Million (PGK \$343 million) flowing back to the PNG economy.
US \$2,558 (PGK \$8,332) spend per visitor per trip; from a total of 41,216 visitors
US \$247 (PGK \$805) per visitor per day

Respondent Profile and Characteristics	Decision Making	Satisfaction
<ul style="list-style-type: none">• 57% from AU/NZ• 54% under 50 years• 34% female• 75% household income less than US \$100,000	<ul style="list-style-type: none">• Friends and family, previous visits and general travel websites are key sources for planning holidays• 63% purchased travel by themselves	<ul style="list-style-type: none">• 93% would come back• Satisfied with people, scenery or landscape, activities and attractions, and culture• Safety and security, environment and rubbish least appealing

Direct Economic Impact - Spend in Country and Prior to Arrival

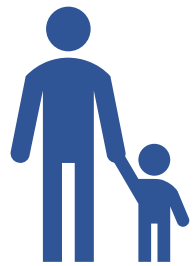


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Presentation Structure



Visitor Characteristics - IVS Respondent Data



People Covered

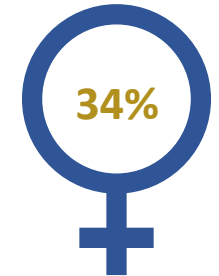
926 Adults
57 Children



Household Income

42% Under \$50,000
33% \$50,000 - \$100,000
15% Over \$100,001

Gender



Females



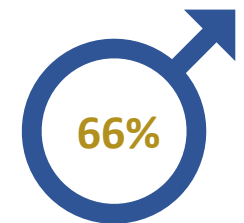
Age

13% 18-29 years old
17% 30-39 years old
25% 40-49 years old
23% 50-59 years old
18% 60-69 years old



Country of Origin

52% Australia
23% Asia
8% Long Haul*
7% North America
5% New Zealand
5% Pacific

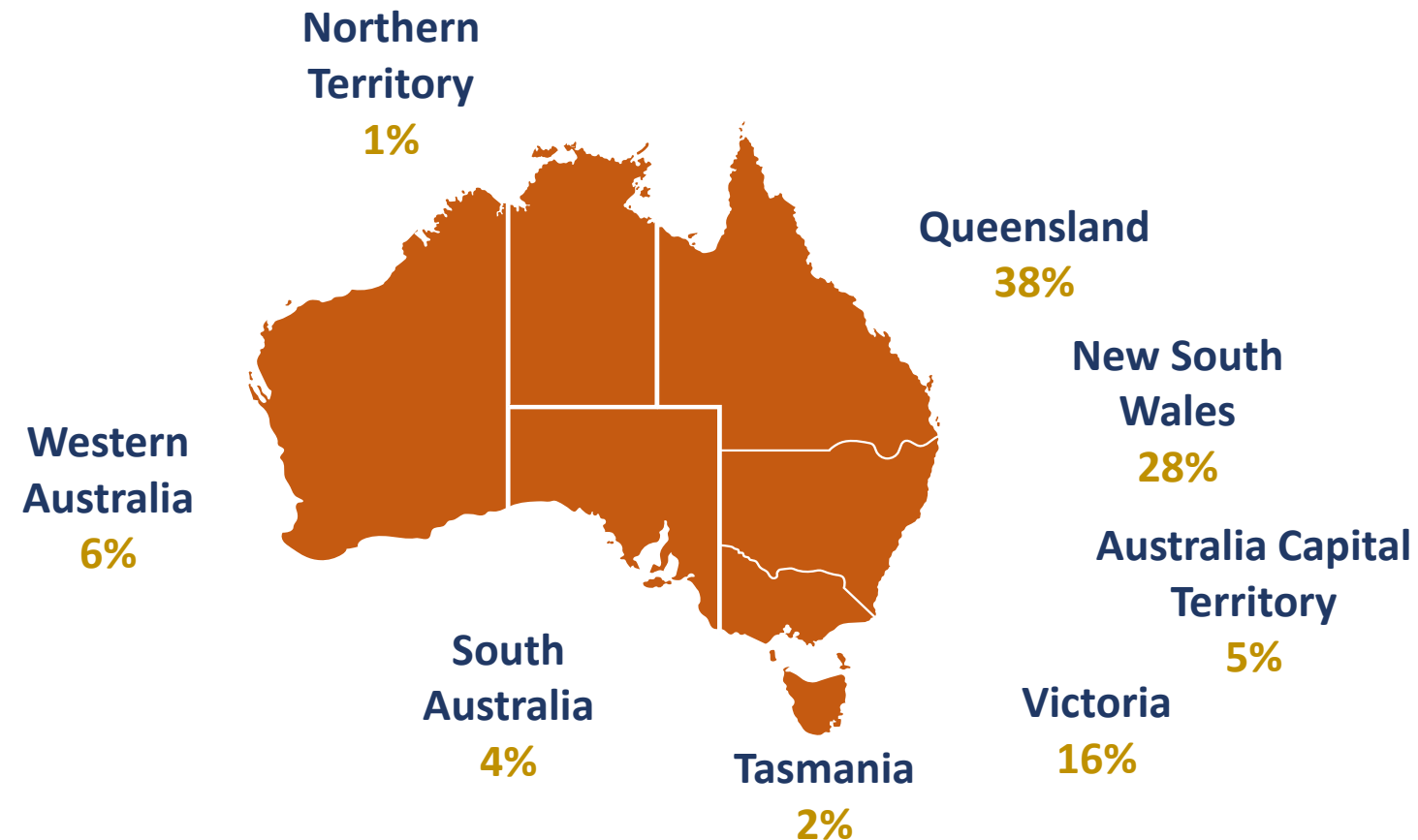


Males

*Note: Long haul countries are countries not included in specific long haul destinations (i.e., Asia and North America).

Australian Respondents - IVS Respondent Data

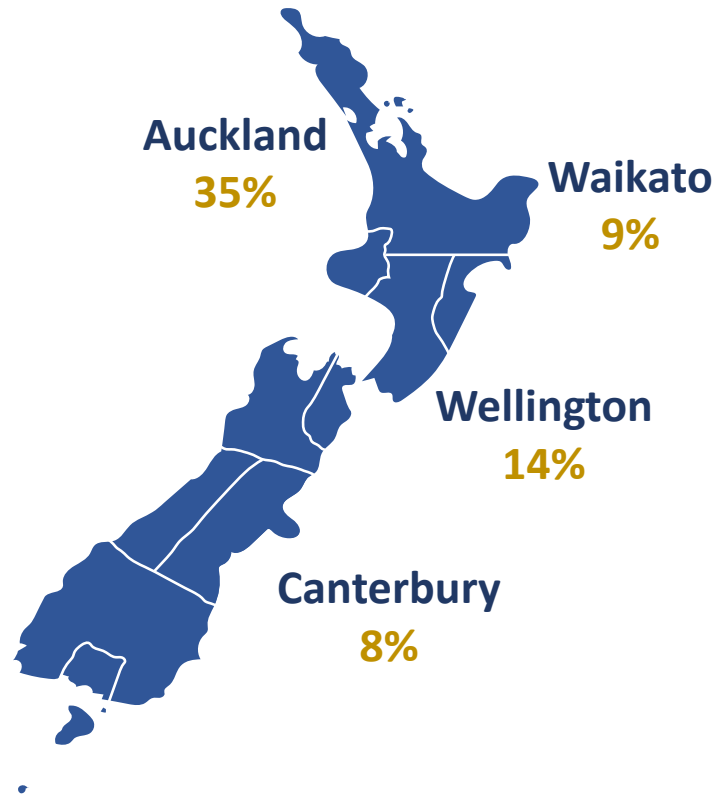
Visitor Profile



New South Wales, Queensland and Victoria make up **82%** of all Australian visitor arrivals

New Zealand Respondents - IVS Respondent Data

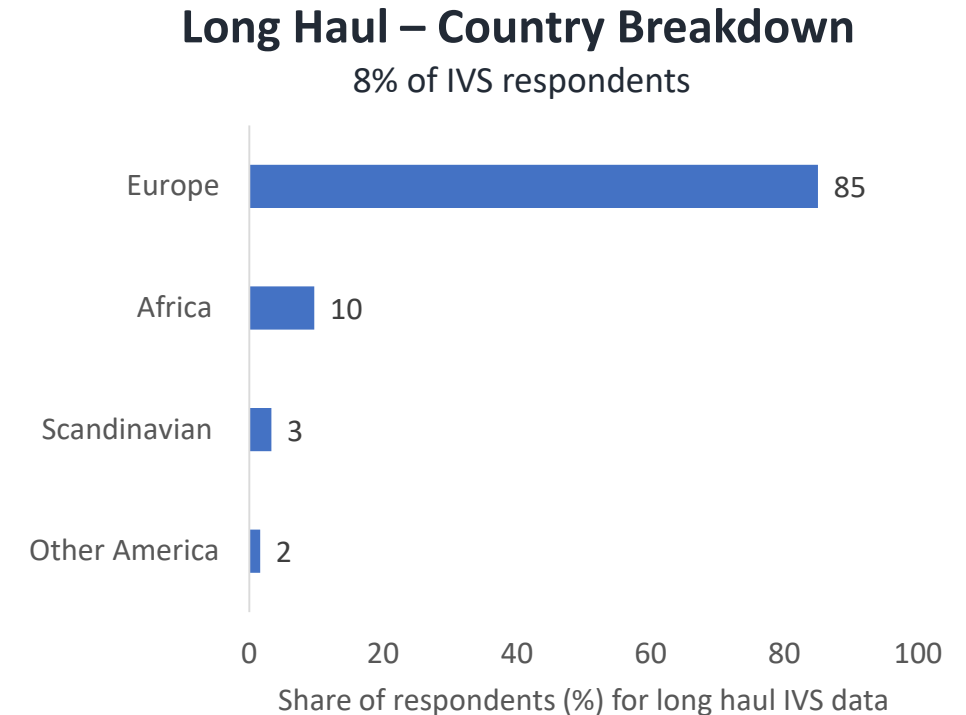
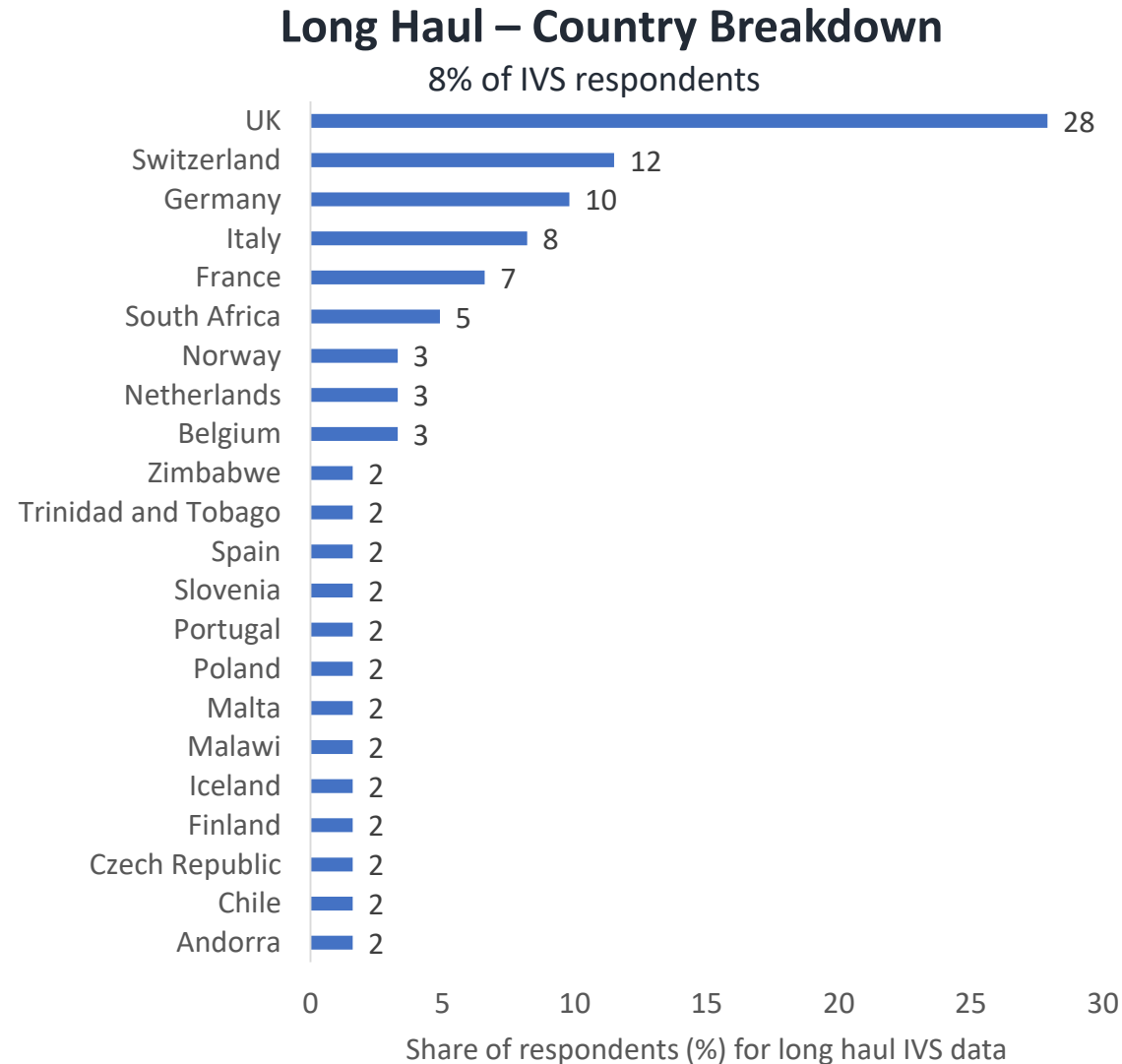
Visitor Profile



Auckland, Wellington, Waikato and Canterbury make up **66%** of all New Zealand visitor arrivals

Long Haul – Country Breakdown (IVS Respondent Data)

Visitor Profile



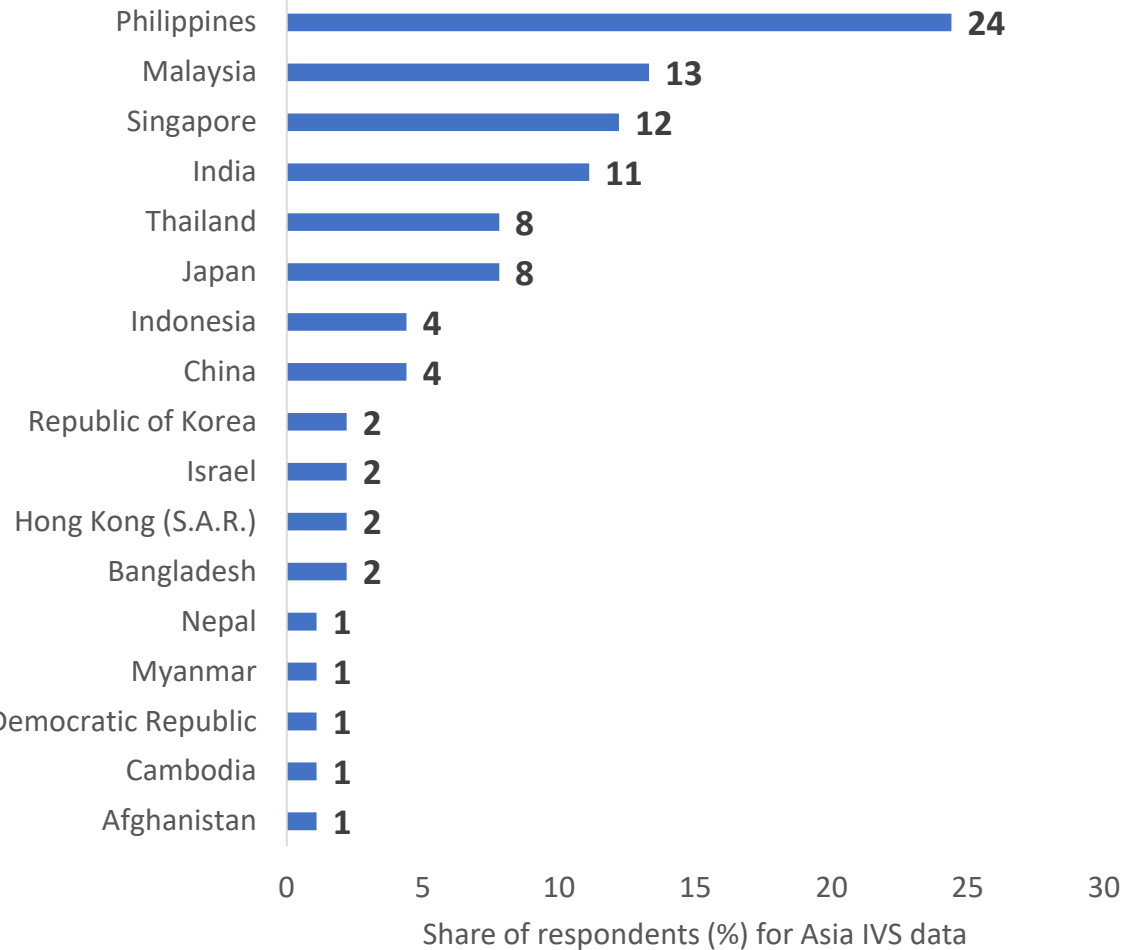
Note: Due to rounding, some figures will be 105%

Long Haul – Country Breakdown (IVS Respondent Data)

Visitor Profile

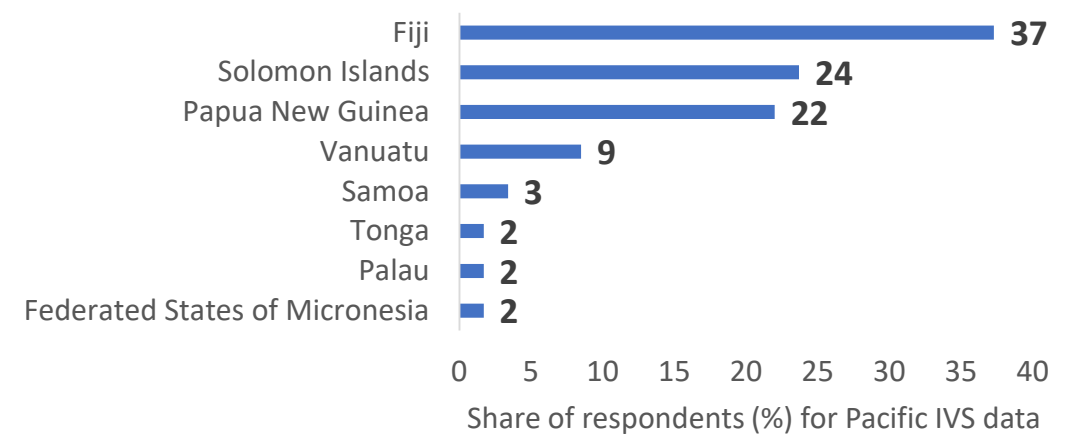
Asia – Country Breakdown

11% of IVS respondents



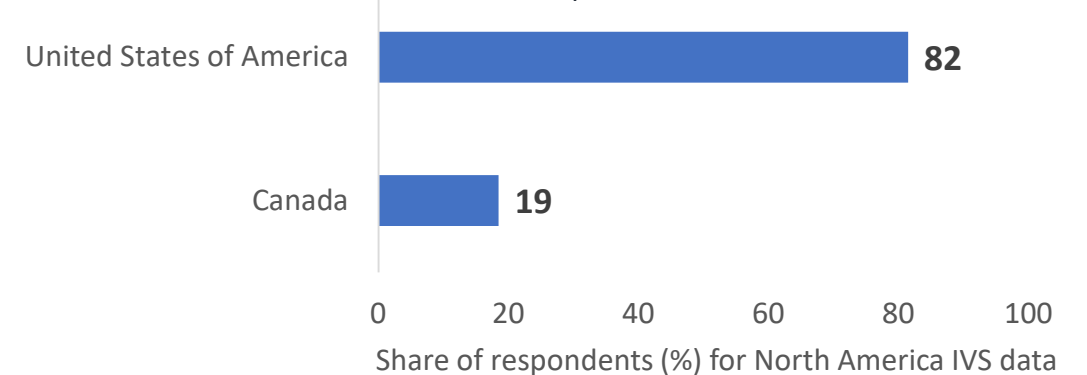
Pacific – Country Breakdown

7% of IVS respondents



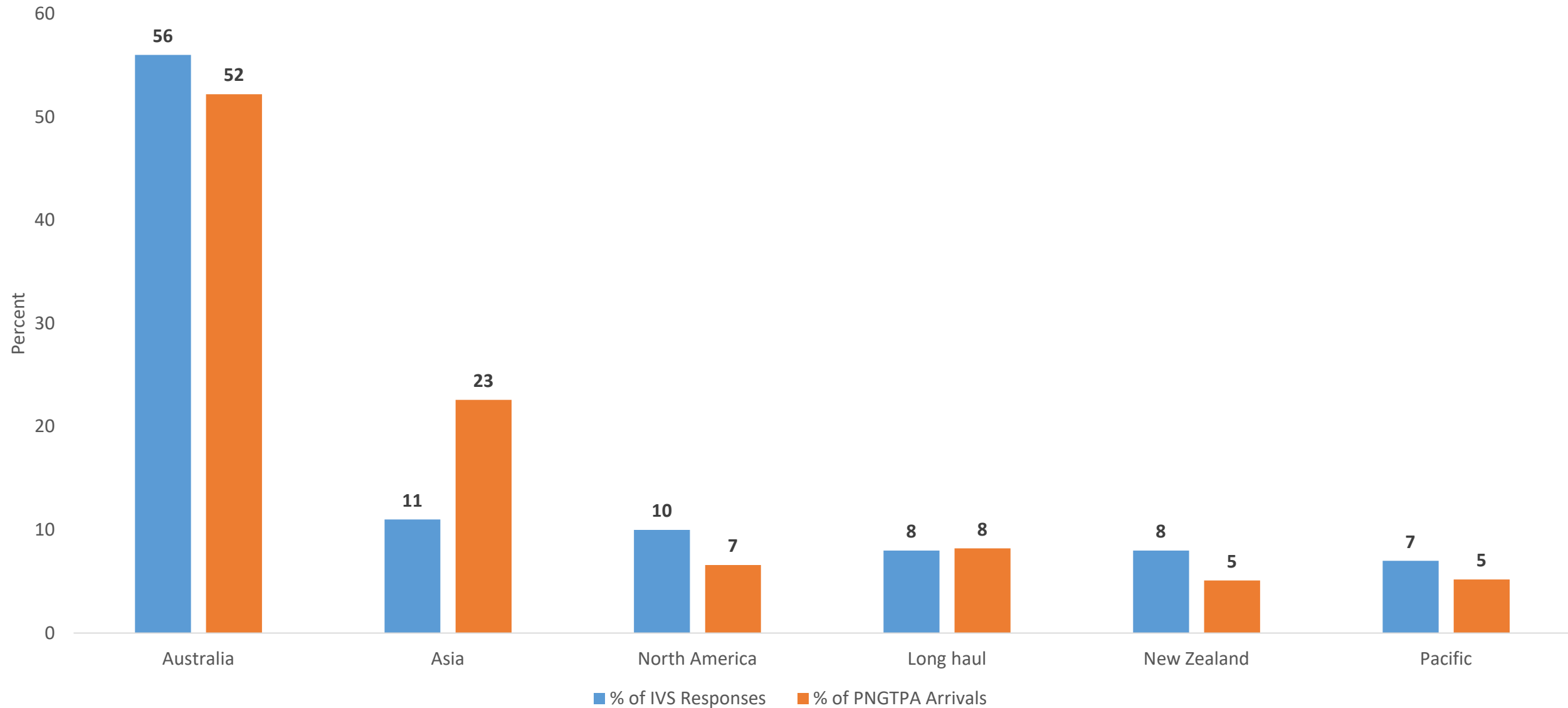
North America – Country Breakdown

10% of IVS respondents



Note: Due to rounding, some figures will be 97% or 101%

Country of Origin



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Presentation Structure



Visitor Characteristics – Summary



Airlines Used

64%	Air Niugini
28%	Qantas
13%	Virgin Australia
6%	Philippine Airlines
2%	PNG Air



Travel Companions

45%	Solo
25%	One companion



Length of Stay

10.3	Nights on average
44%	Stayed up to 1 week



Purpose of Visit

41%	Business
24%	Holiday
20%	Visiting Friends/Family



Previous Visits

41%	First trip
18%	1 or 2 times
11%	3 or 4 times
30%	5+ times

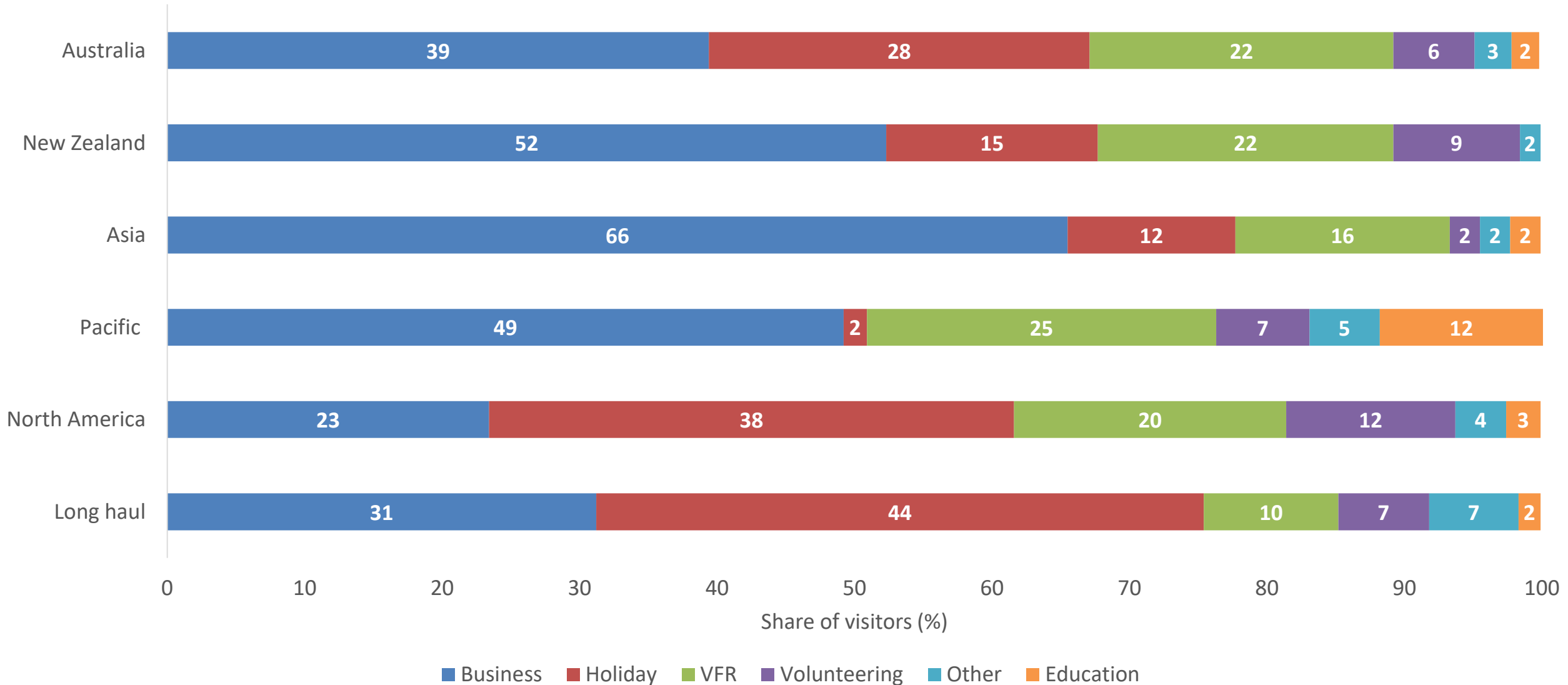


Regions Visited on Trip

76%	Papua Region
22%	Islands Region
21%	Momase Region
15%	Highlands Region

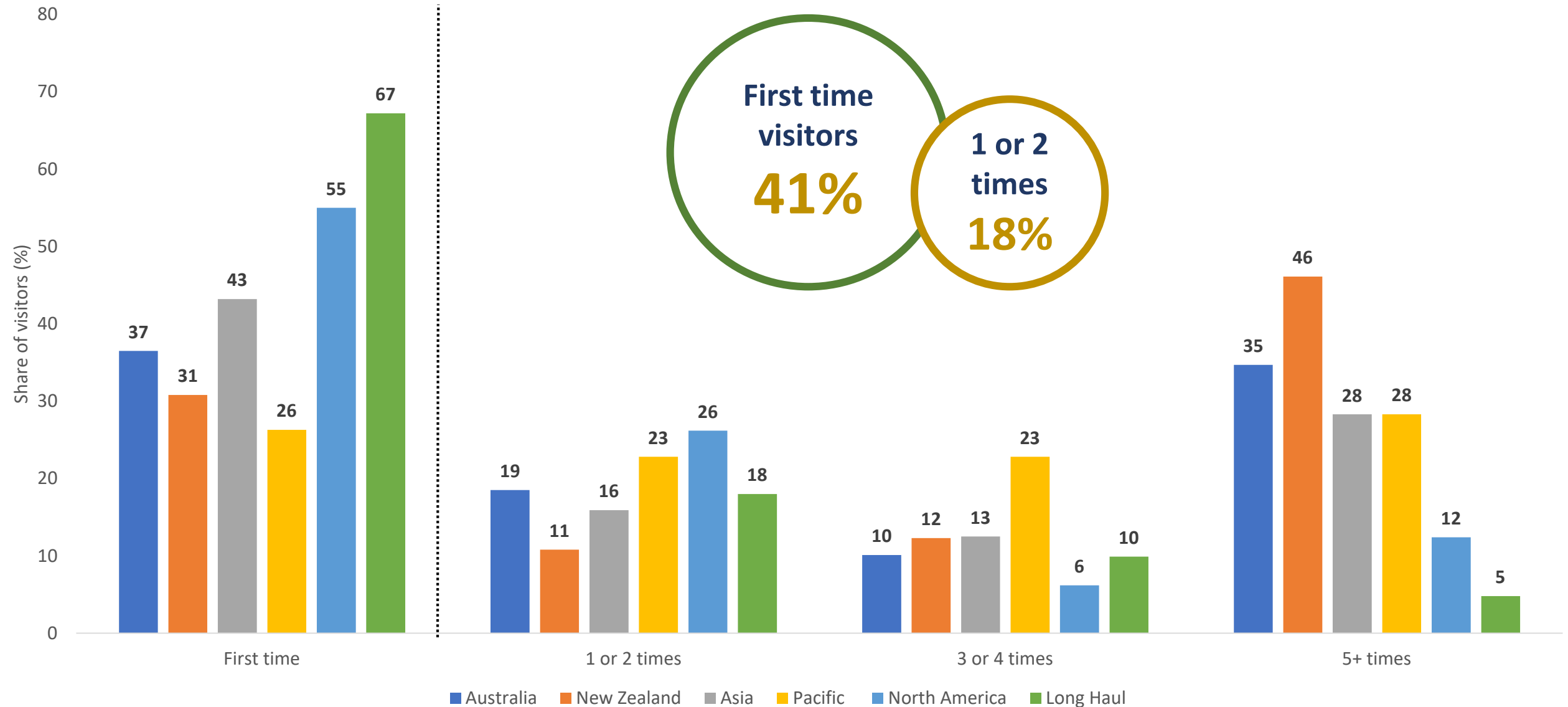
Main Purpose of Visit – Country Segmentation

Visitor Characteristics
and Preferences



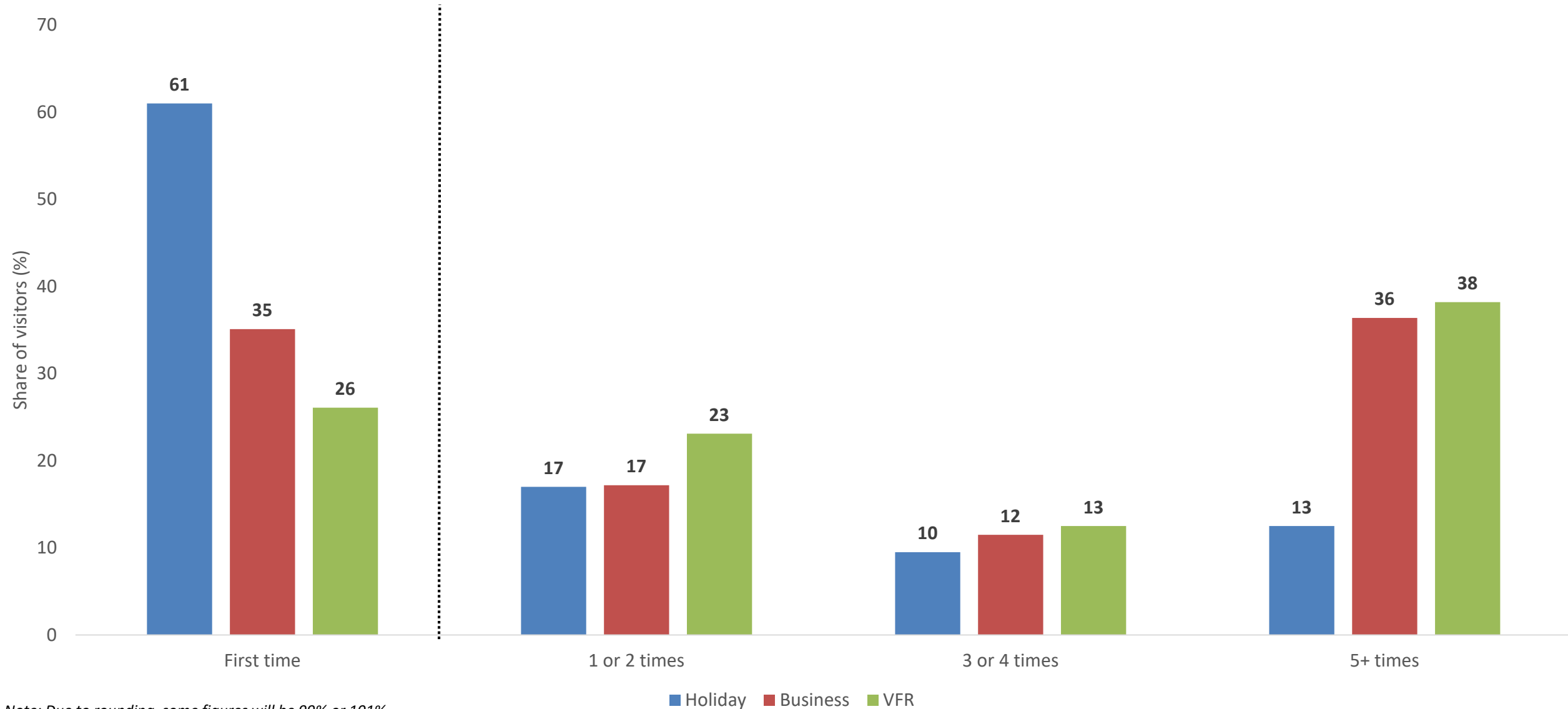
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Previous visits – Country Segmentation

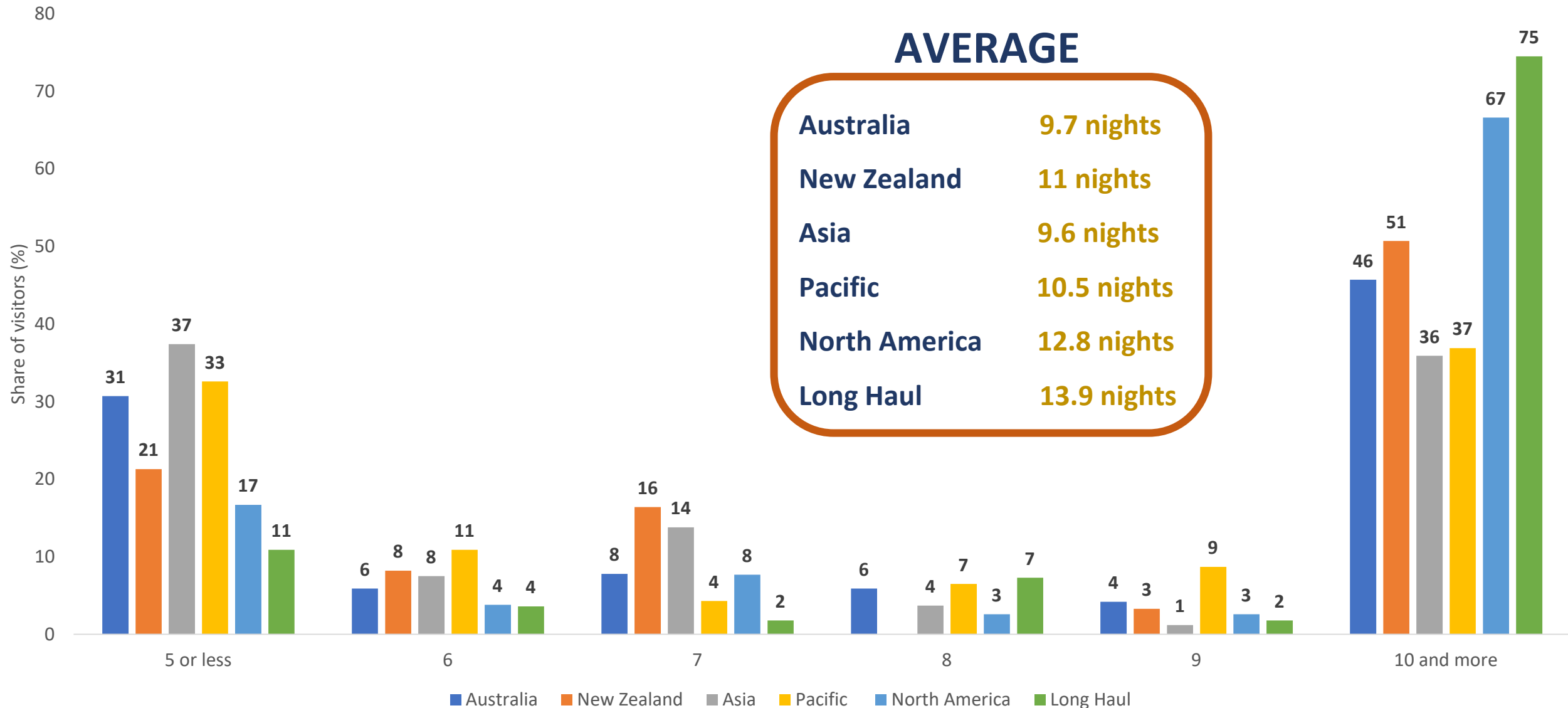


Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Previous Visits – Purpose of Visit Segmentation

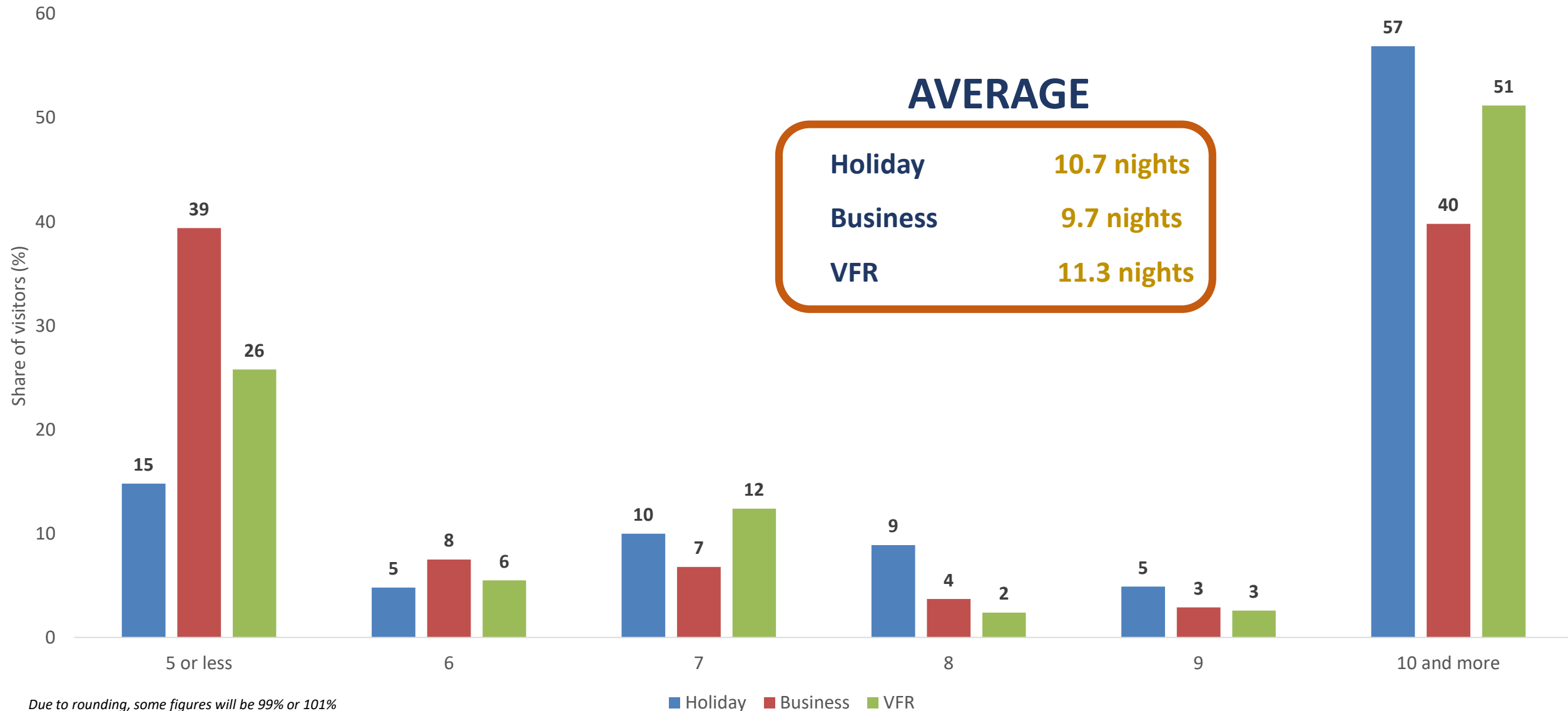


Length of Stay (nights) – Country Segmentation



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Length of Stay (nights) – Purpose of Visit Segmentation



Airlines Used for Travel – Country Segmentation



43%	Australia
28%	New Zealand
2%	Asia
7%	Pacific
33%	North America
8%	Long Haul



Air Niugini

55%	Australia
34%	New Zealand
79%	Asia
95%	Pacific
65%	North America
80%	Long Haul



17%	Australia
52%	New Zealand
2%	Asia
2%	Pacific
6%	North America
10%	Long Haul

Airlines PNG

1%	Australia
3%	New Zealand
1%	Asia
0%	Pacific
6%	North America
7%	Long Haul



0%	Australia
0%	New Zealand
20%	Asia
2%	Pacific
15%	North America
7%	Long Haul

Other

1%	Australia
5%	New Zealand
3%	Asia
2%	Pacific
9%	North America
7%	Long Haul

Airlines Used for Travel – Purpose of Visit Segmentation



28%	All Visitors
25%	Holiday
28%	Business
31%	VFR



13%	All Visitors
11%	Holiday
14%	Business
14%	VFR



6%	All Visitors
4%	Holiday
8%	Business
5%	VFR



Air Niugini

64%	All Visitors
69%	Holiday
62%	Business
61%	VFR

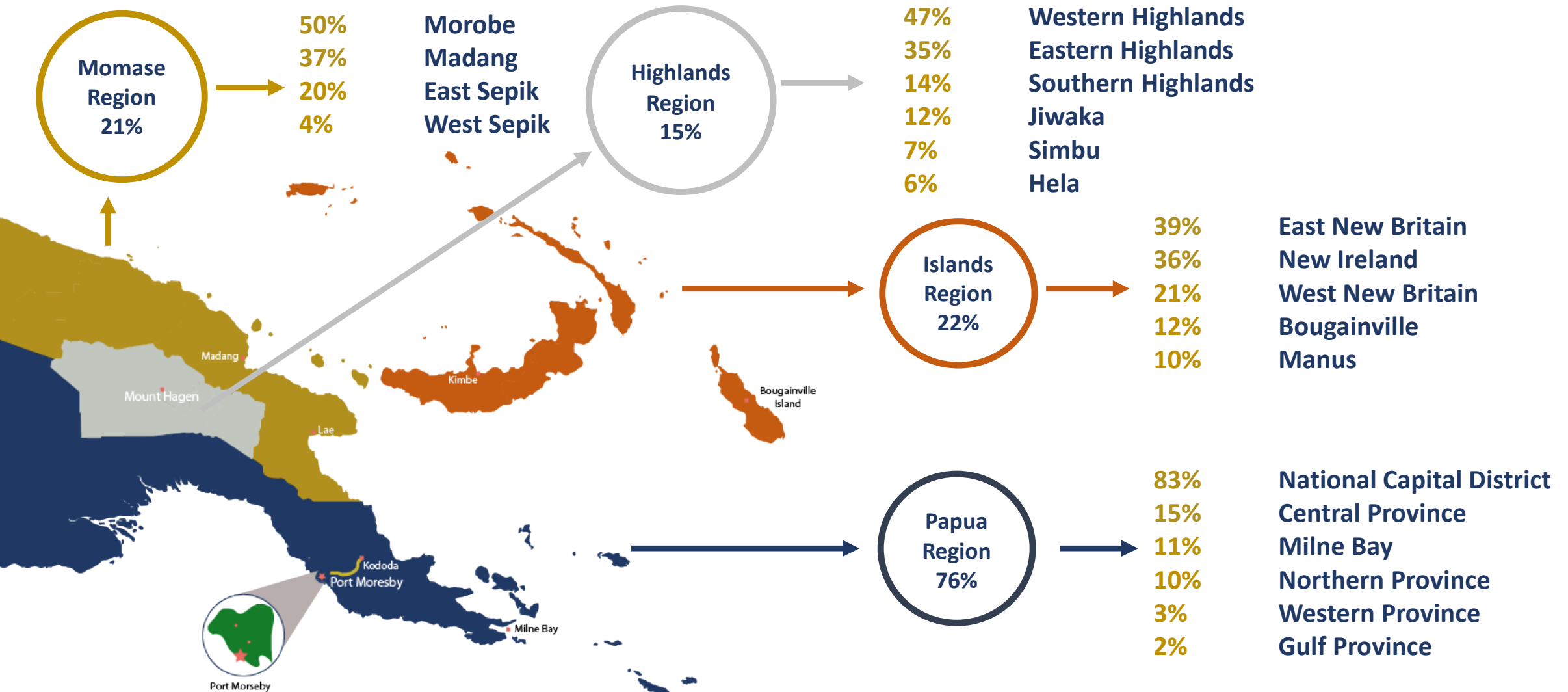
Airlines PNG

2%	All Visitors
2%	Holiday
2%	Business
2%	VFR

Other

2%	All Visitors
2%	Holiday
3%	Business
1%	VFR

Regions Visited – All Visitors



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Visiting each PNG Region – Purpose of Visit Segmentation

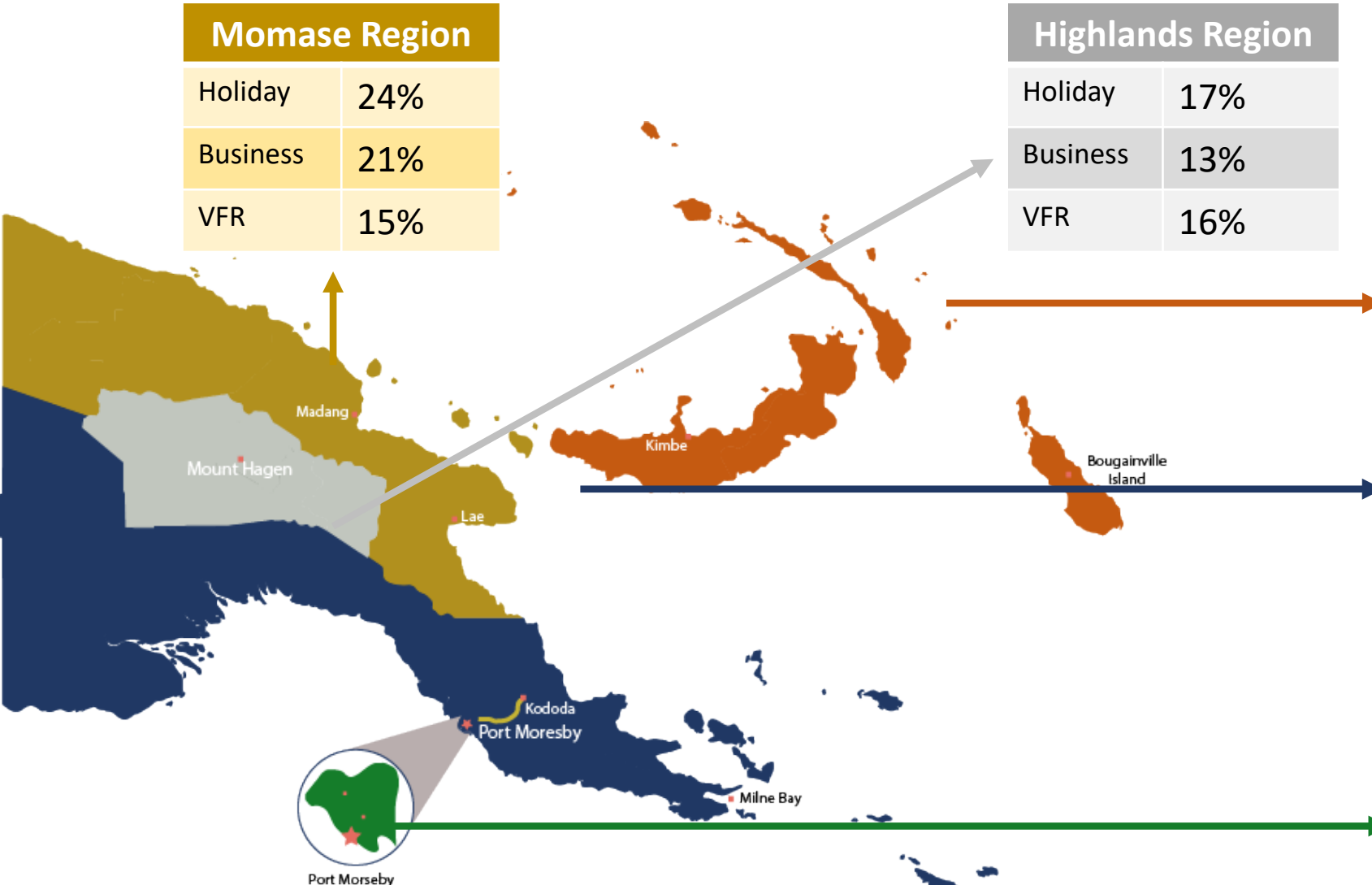
Momase Region	
Holiday	24%
Business	21%
VFR	15%

Highlands Region	
Holiday	17%
Business	13%
VFR	16%

Islands Region	
Holiday	31%
Business	19%
VFR	16%

Papua Region Excluding NCD	
Holiday	68%
Business	70%
VFR	87%

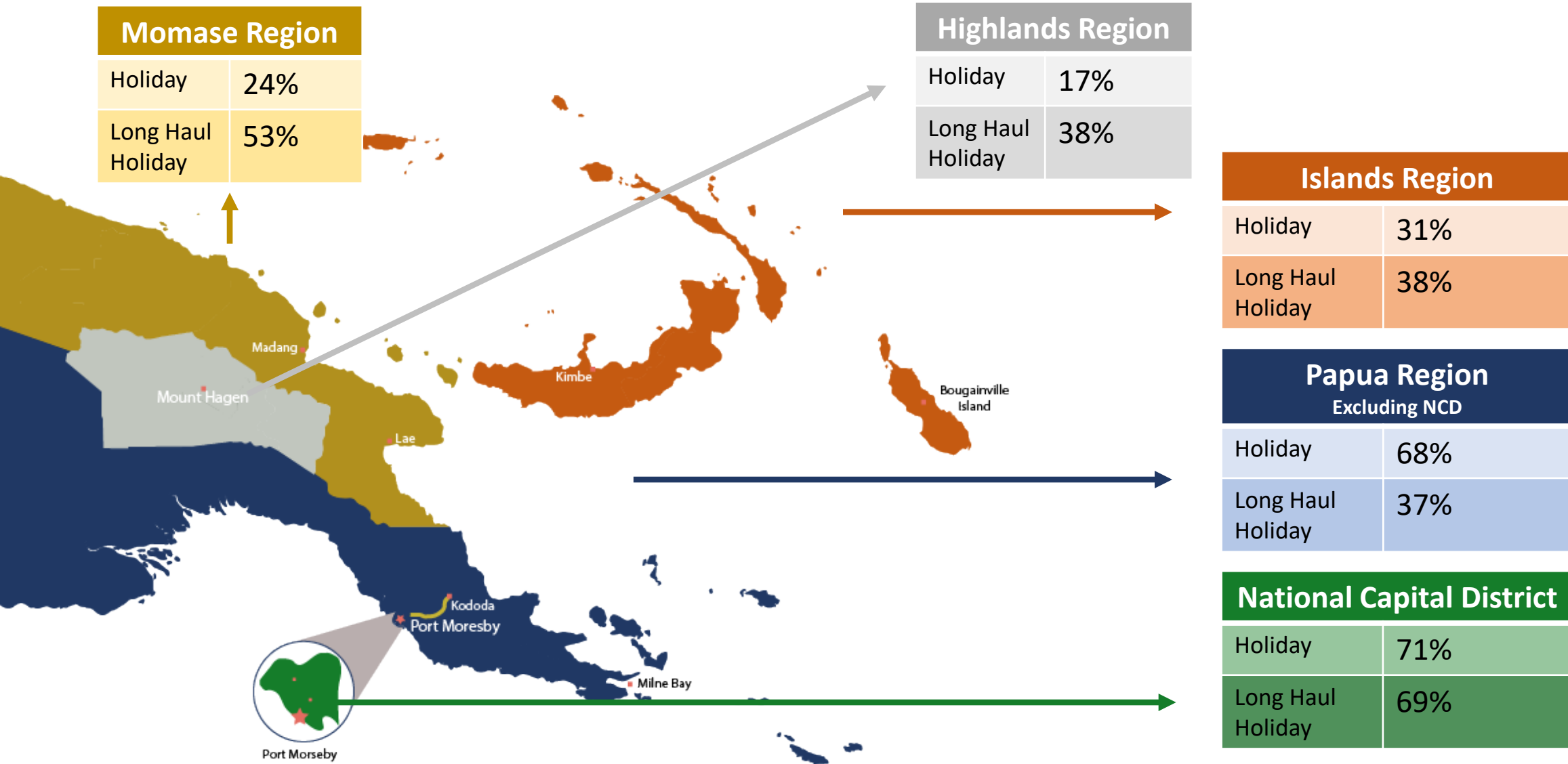
National Capital District	
Holiday	71%
Business	86%
VFR	88%



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

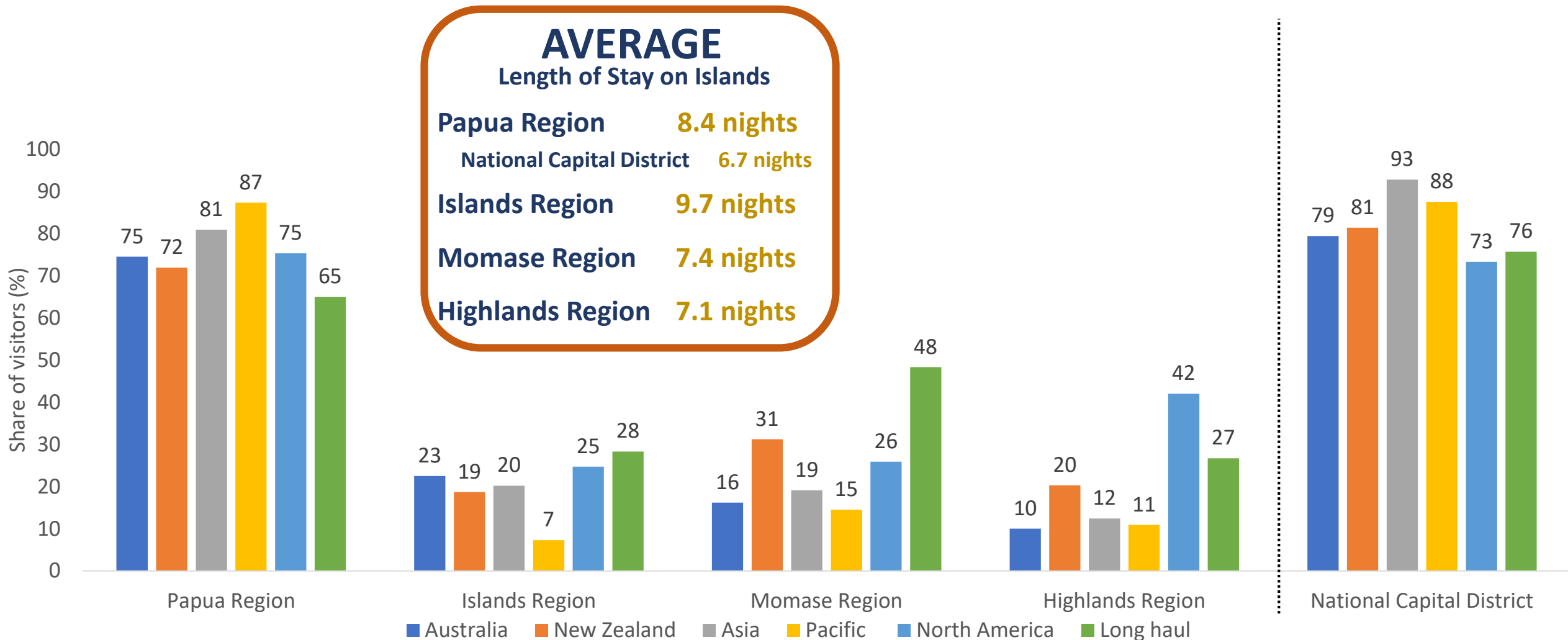
Visiting each PNG Region - Holiday and Long Haul Holiday



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Regions Visited – Country Segmentation



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

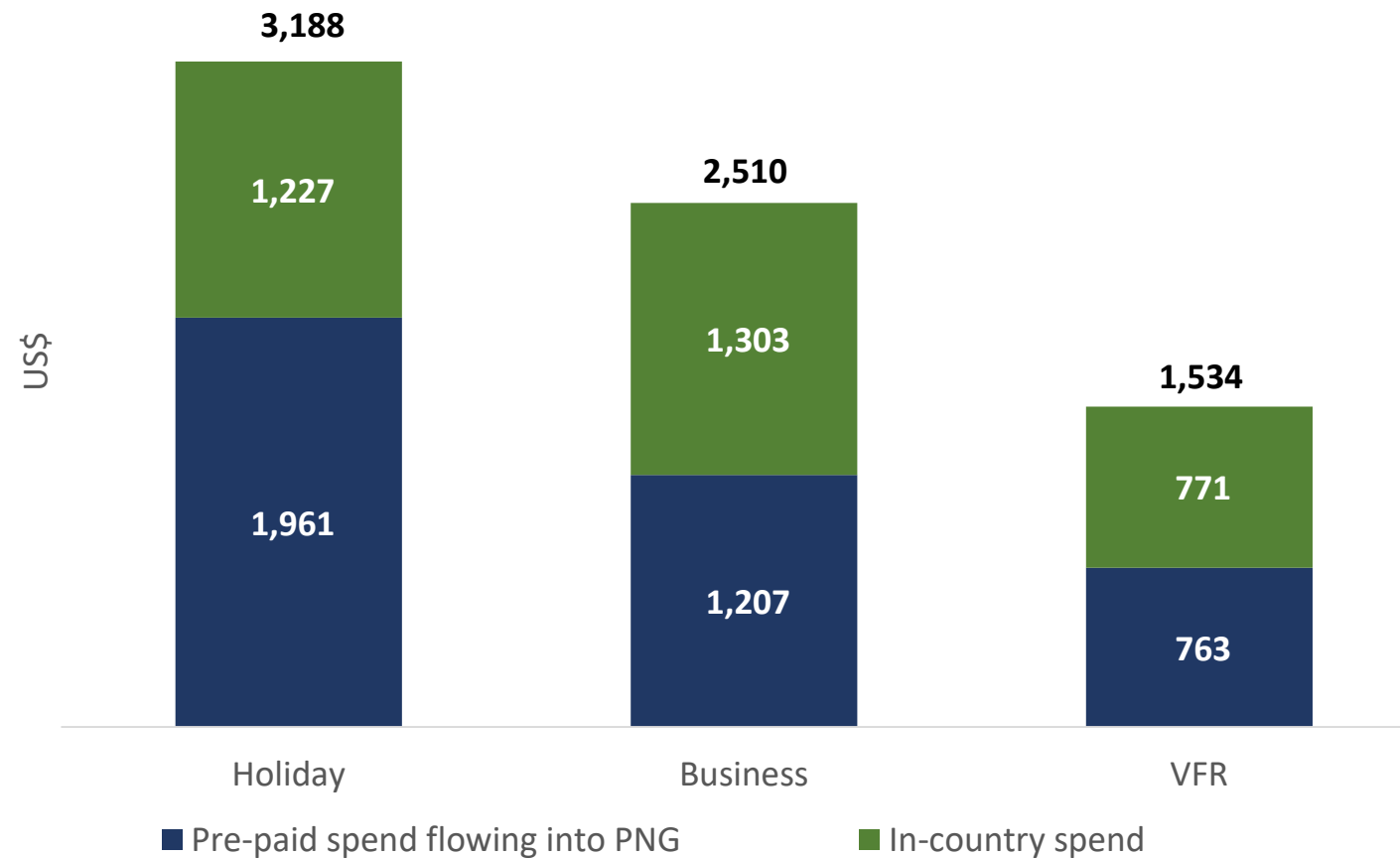
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Presentation Structure



Expenditure by Purpose of Visit Segmentation

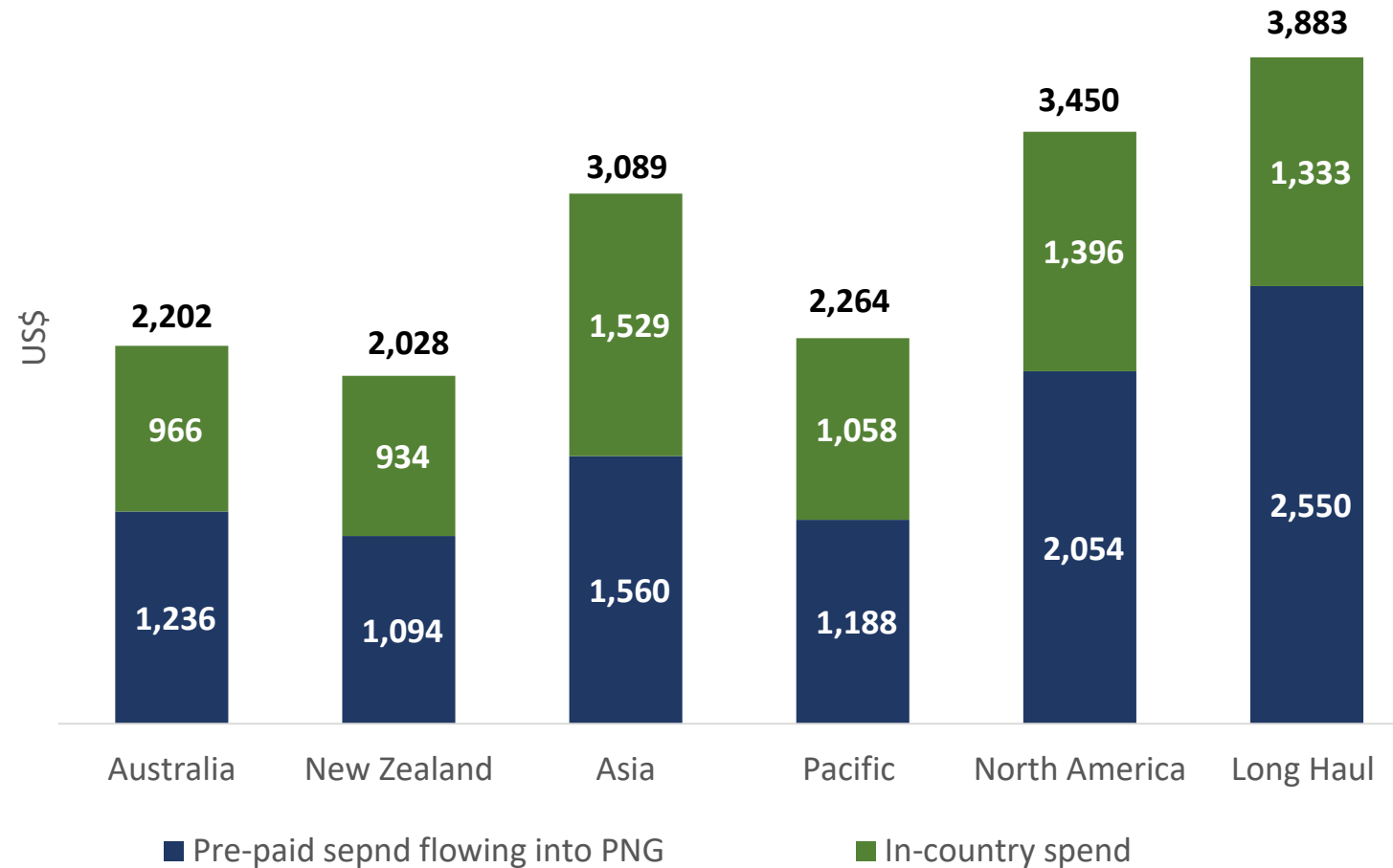
Per Person Per Visit



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

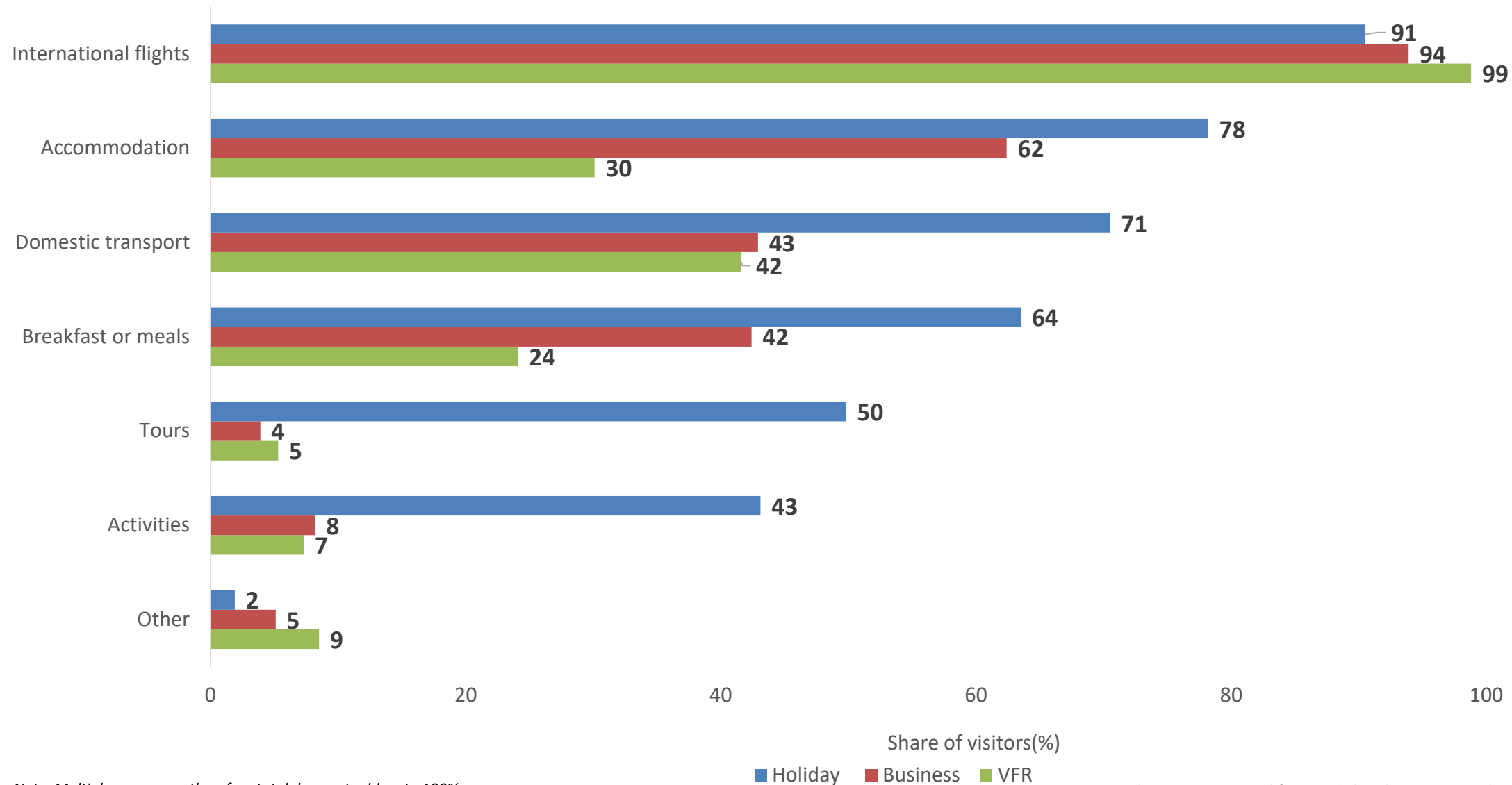
Expenditure by Country Segmentation

Per Person Per Visit



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Visitor Expenditure Prior to Arrival – Purpose of Visit Segmentation



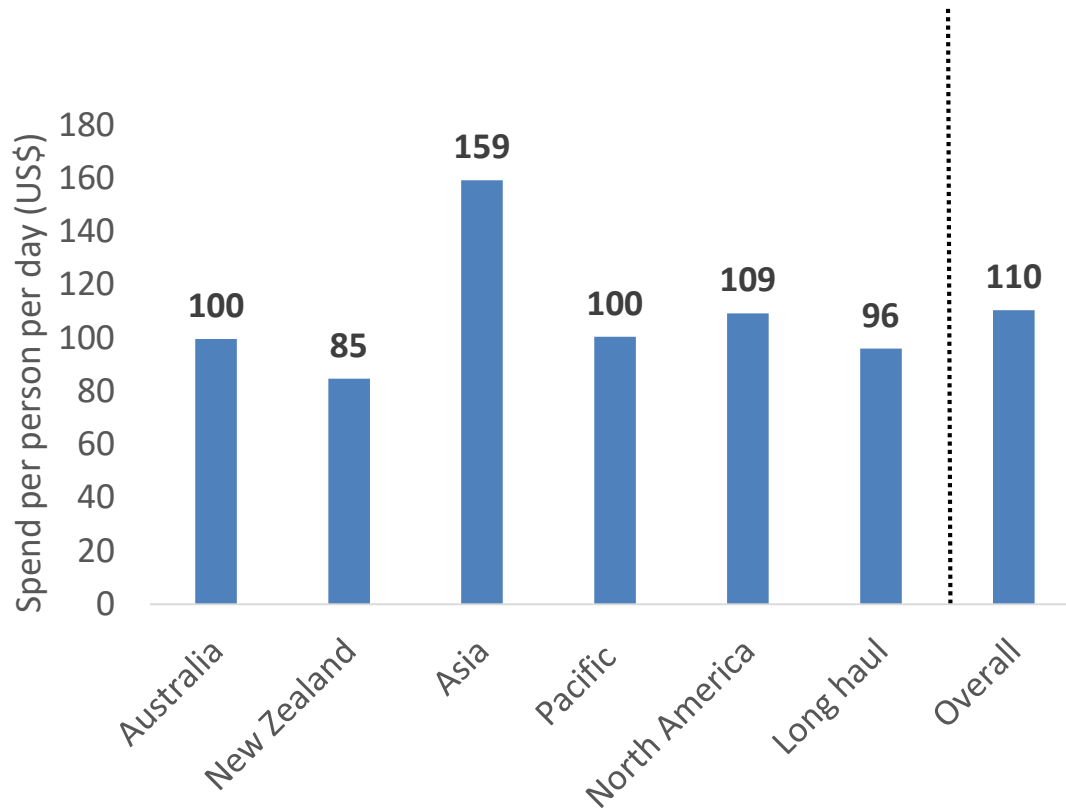
Note: Multiple responses, therefore total does not add up to 100%

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

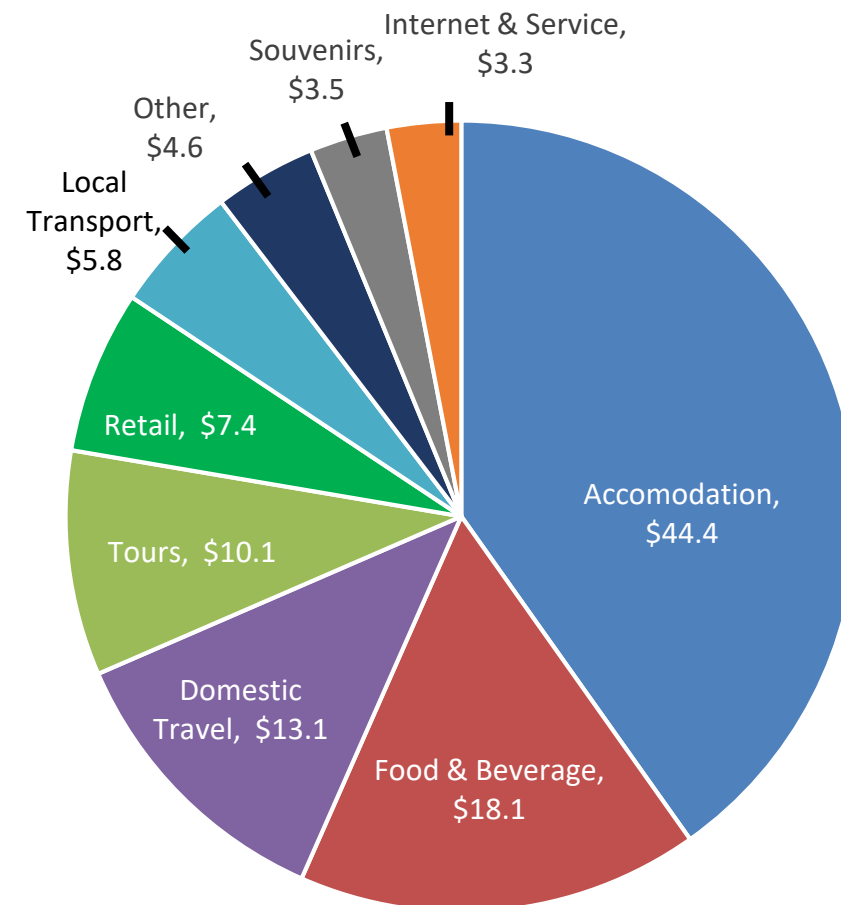
Average Spend in PNG per day

Per Person Per Day

By Market



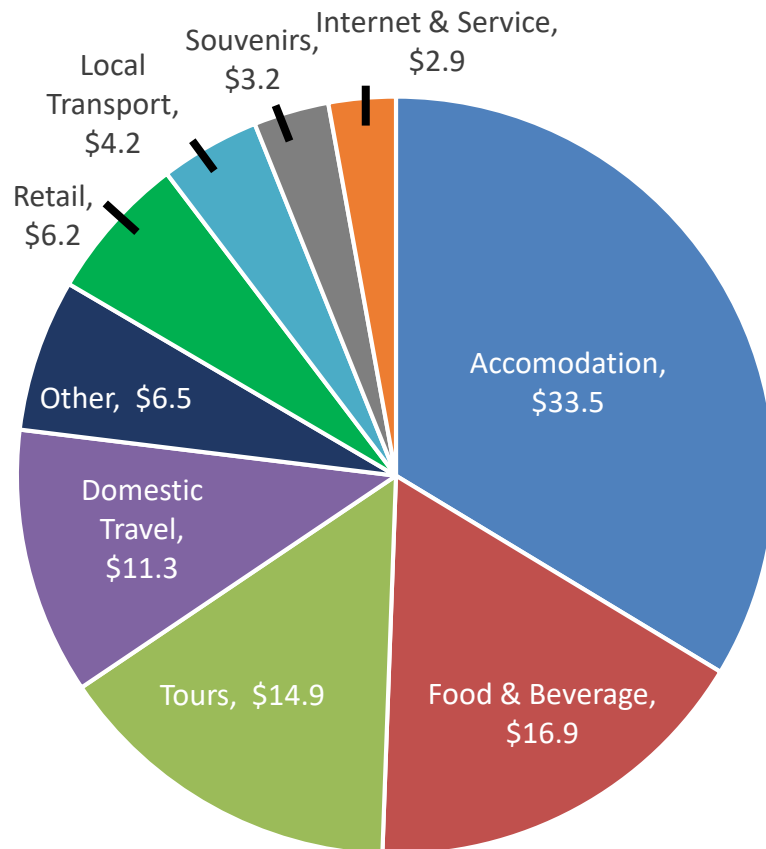
Overall - \$110 per day



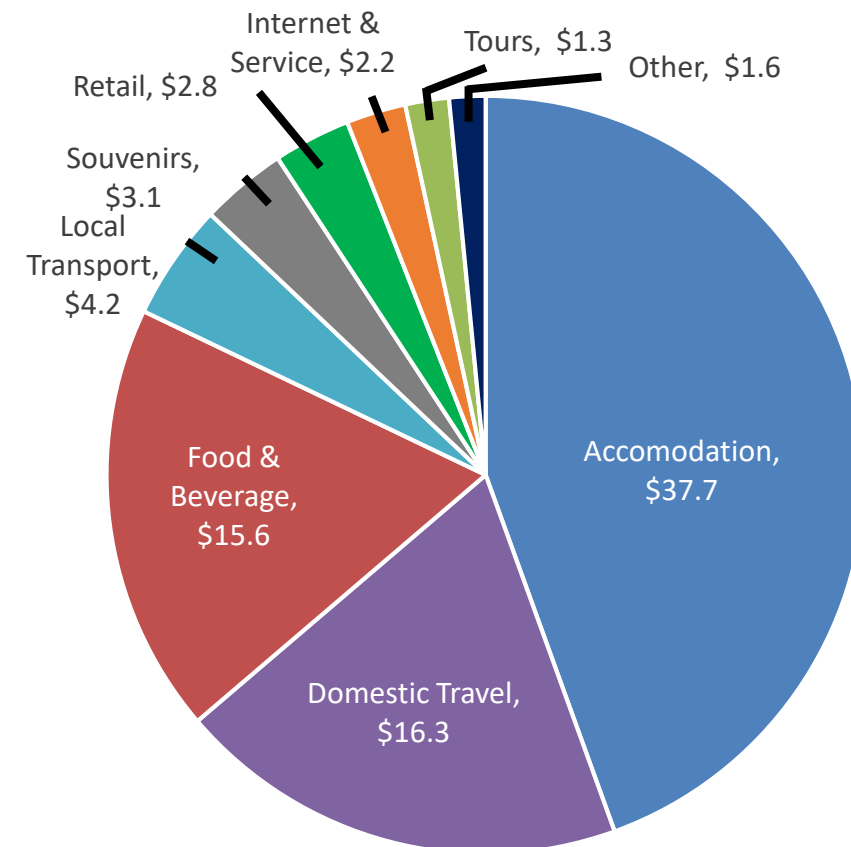
Average Spend in PNG by Australia and New Zealand Visitors

Visitor Spending and Impact

Australia - \$100 per day



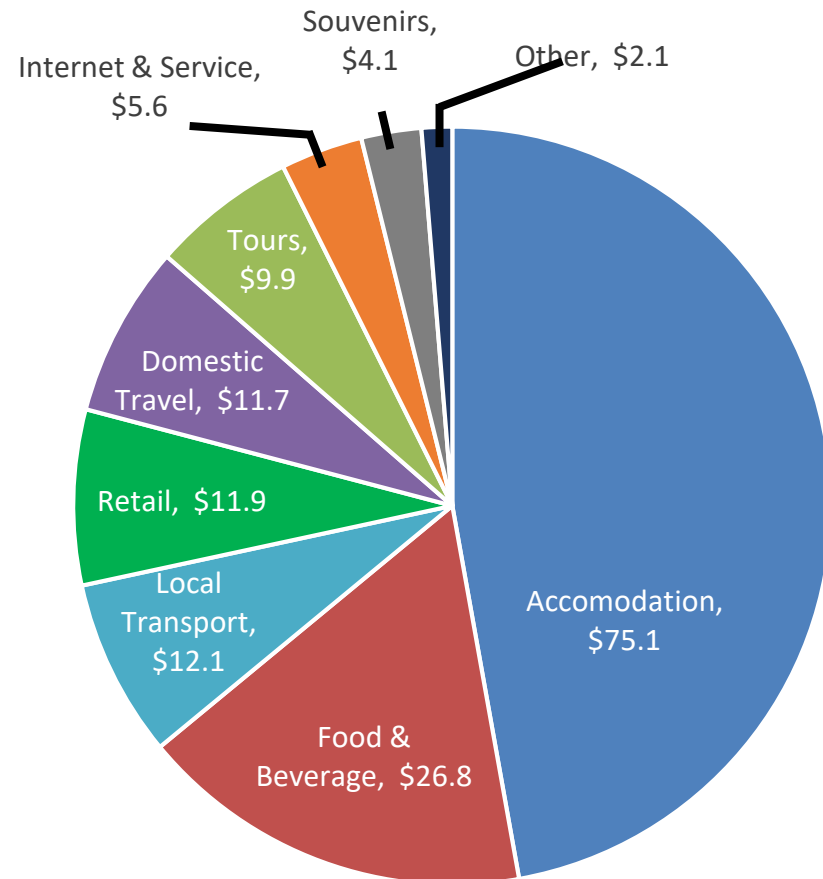
New Zealand - \$85 per day



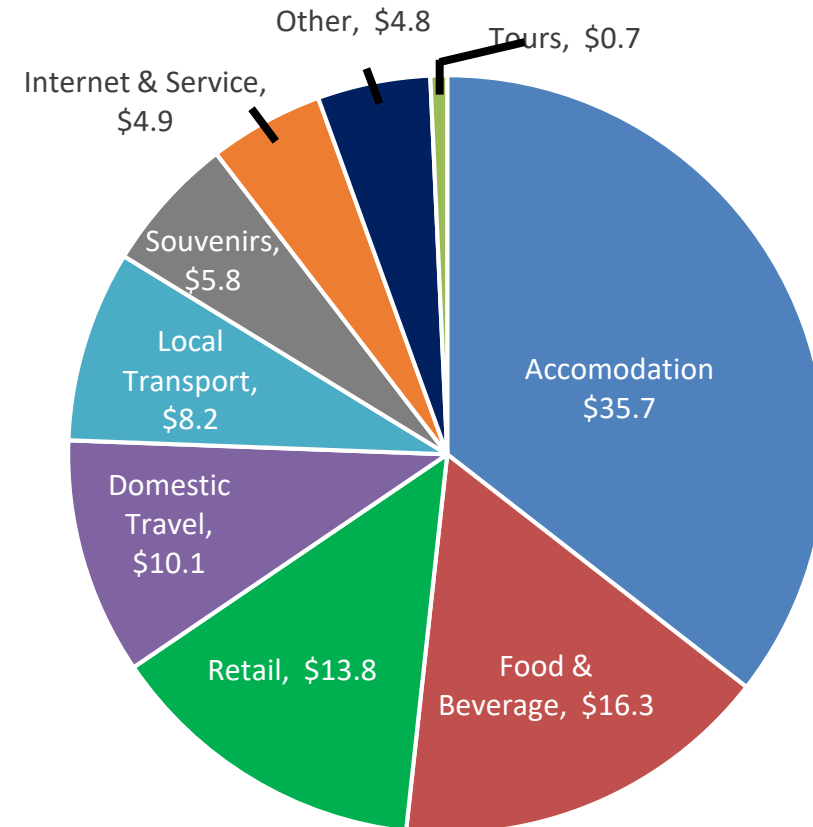
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Average Spend in PNG by Asia and Pacific Visitors

Asia - \$159 per day



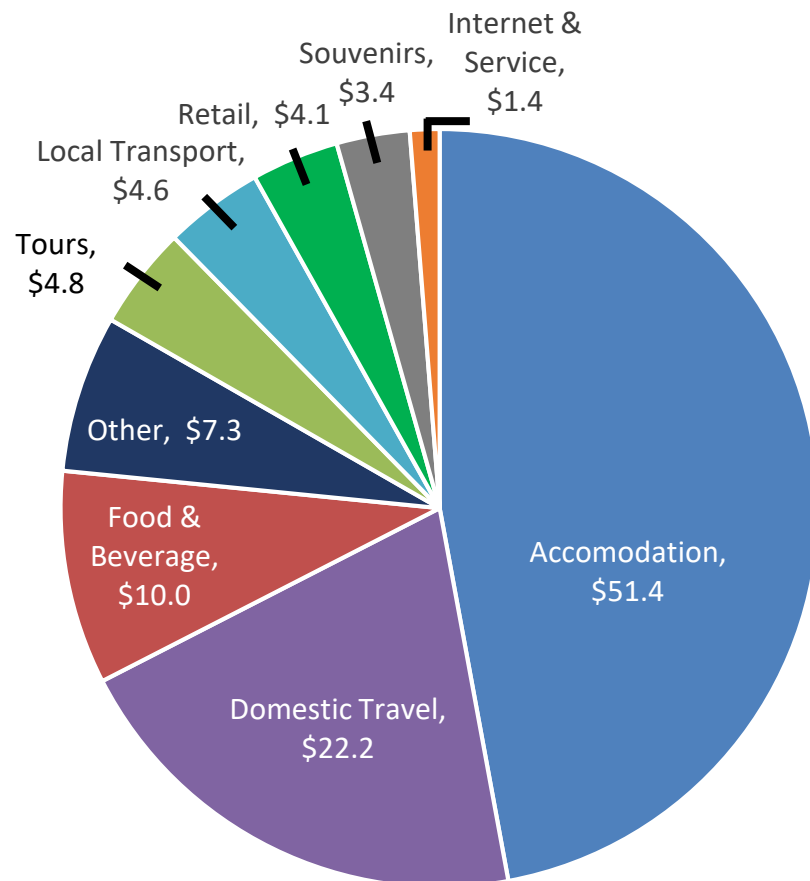
Pacific - \$100 per day



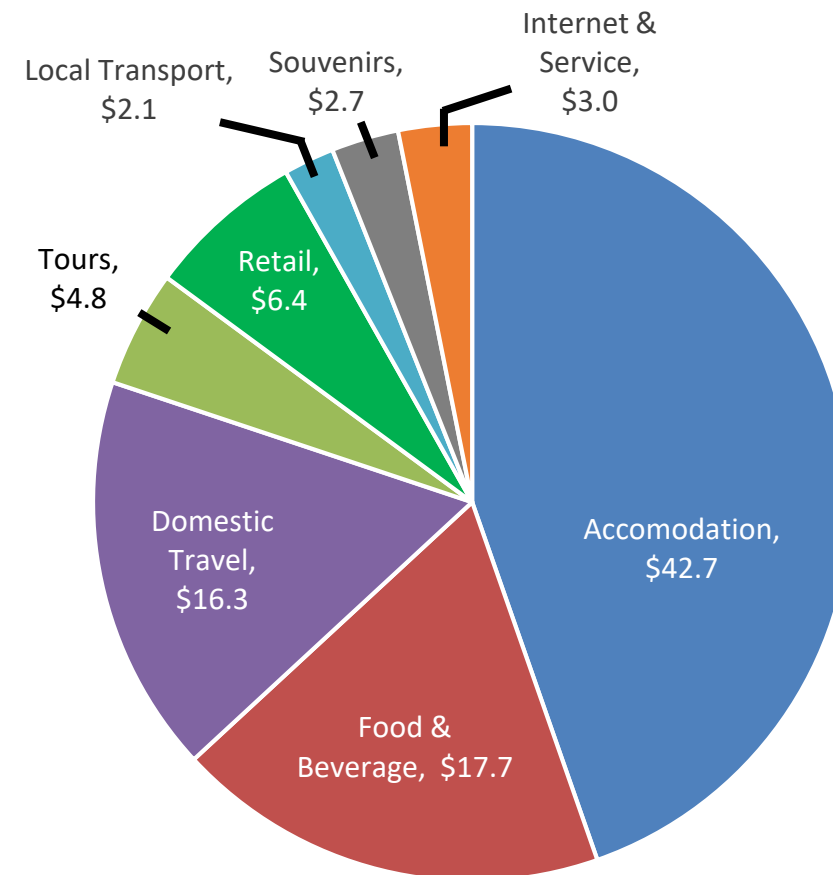
Average Spend in PNG by North America and Long Haul Visitors

Visitor Spending and Impact

North America – US \$109 per day





Long Haul – US \$96 per day



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Visitor Expenditure – Per Person and Total

	Pre-Paid Spend flowing into PNG	+	In-country Spend	=	Total Spend
 Per Day	<div>US \$137</div> <div>PGK \$447</div>		<div>US \$110</div> <div>PGK \$360</div>		<div>US \$247</div> <div>PGK \$805</div>
 Whole Trip	<div>US \$1,417</div> <div>PGK \$4,615</div>		<div>US \$1,141</div> <div>PGK \$3,716</div>		<div>US \$2,558</div> <div>PGK \$8,332</div>

Direct economic impact on PNG for Jan - June 2017

US \$105 million / PGK \$343 billion in total

US \$17.5 million / PGK \$57.2 billion per month

Presentation Structure



Information Sources and Decision Making

How did you find out about PNG?



51%
49%
12%

Previous Visits
Friends and Family
General Websites



How did you purchase your travel?

33% Travel Agent
31% By Myself
29% By Others

What influenced your decision making?



3.0/5 Business and Conference



2.8/5 History and Culture



2.7/5 Friends and Family in PNG



Information Sources for Planning

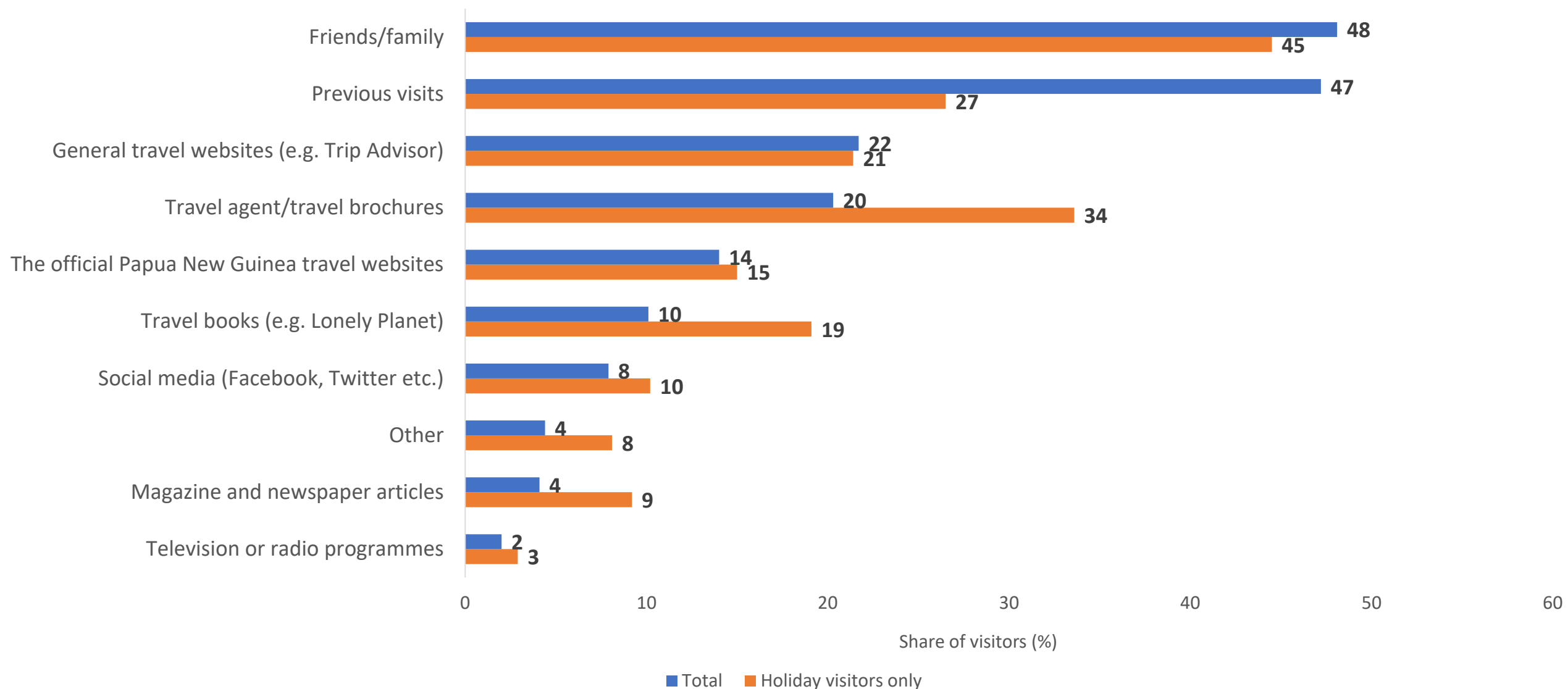
48% Friends and Family
27% Previous Visits
22% General Travel Websites
20% Travel Agent/Travel Brochures



Influences on the Decision to Choose PNG (score out of 5) – Country Segmentation

Australia New Zealand Asia Pacific North America Long Haul	Business/Conference 2.8	Culture and History 2.8	Friends and Family in PNG 2.5	Natural Attractions/ Ecotourism/ Photography 2.3
	Business/Conference 3.2	Friends and Family in PNG 2.9	Culture and History 2.2	Natural Attractions/ Ecotourism/ Photography 2.1
	Business/Conference 3.8	Friends and Family in PNG 3.0	Natural Attractions/ Ecotourism/ Photography 2.9	Culture and History 2.6
	Business/Conference 3.4	Friends and Family in PNG 3.4	Special Events 2.9	Natural Attractions/ Ecotourism/ Photography 2.8
	Culture and History 3.1	Natural Attractions/ Ecotourism/ Photography 2.9	Friends and Family in PNG 2.7	Snorkelling and Diving 2.2
	Culture and History 3.3	Natural Attractions/ Ecotourism/ Photography 3.2	Business/Conference 2.5	Snorkelling and Diving 2.5

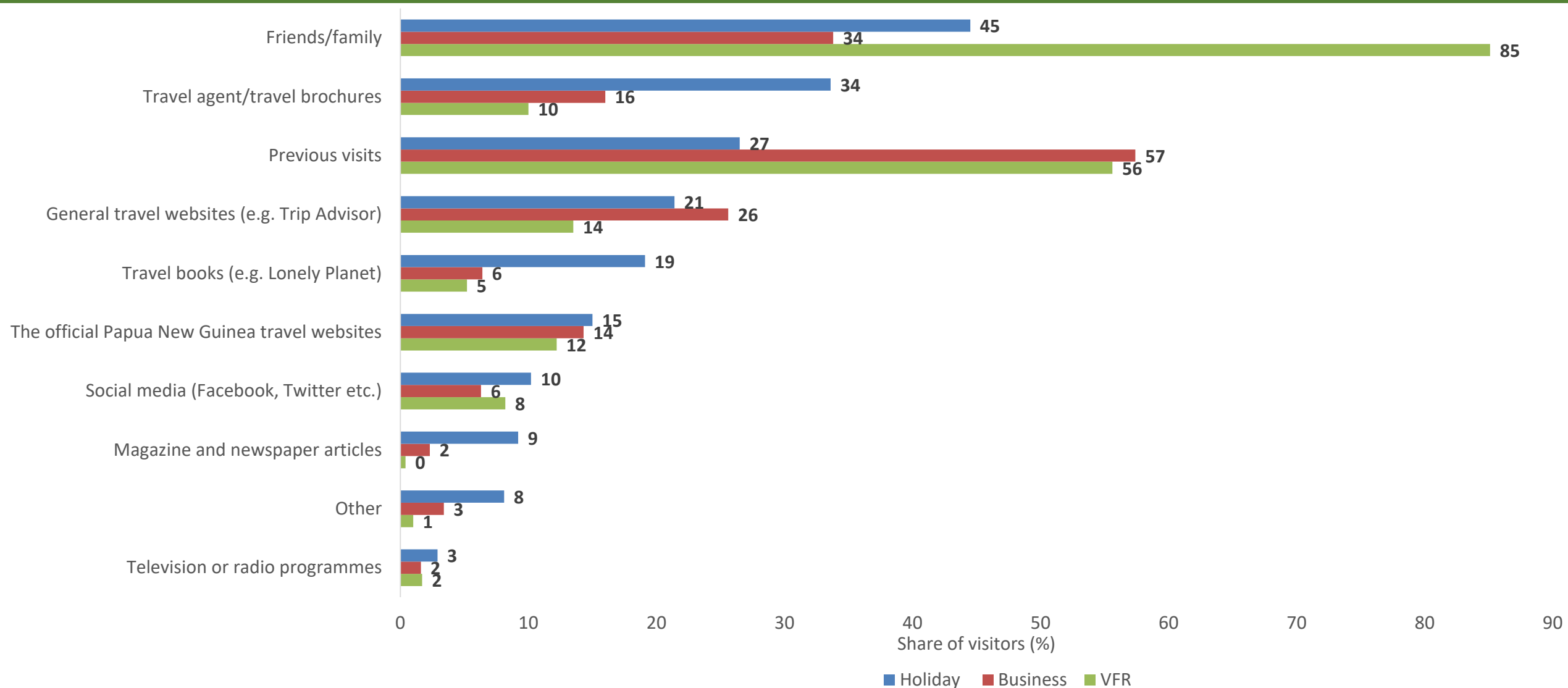
Sources Used for Planning – Total and Holiday Visitors



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Sources Used for Planning – Purpose of Visit



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Travel Purchasing Behaviour – Country Segmentation

Made my own travel arrangements using the internet



36%	Australia
29%	New Zealand
23%	Asia
14%	Pacific
38%	North America
25%	Long Haul

Arrangements were made by a travel agent



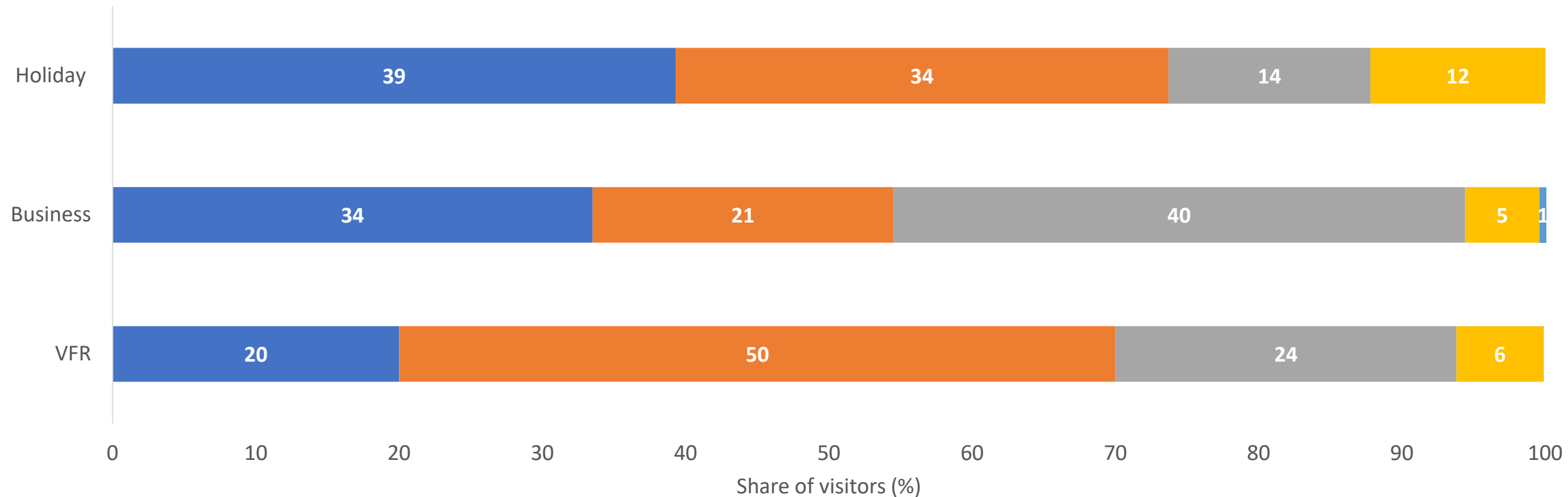
30%	Australia
37%	New Zealand
37%	Asia
39%	Pacific
36%	North America
32%	Long Haul

Travel arrangements were made by others



29%	Australia
26%	New Zealand
33%	Asia
36%	Pacific
12%	North America
27%	Long Haul

Travel Purchasing Behaviour – Purpose of Visit Segmentation



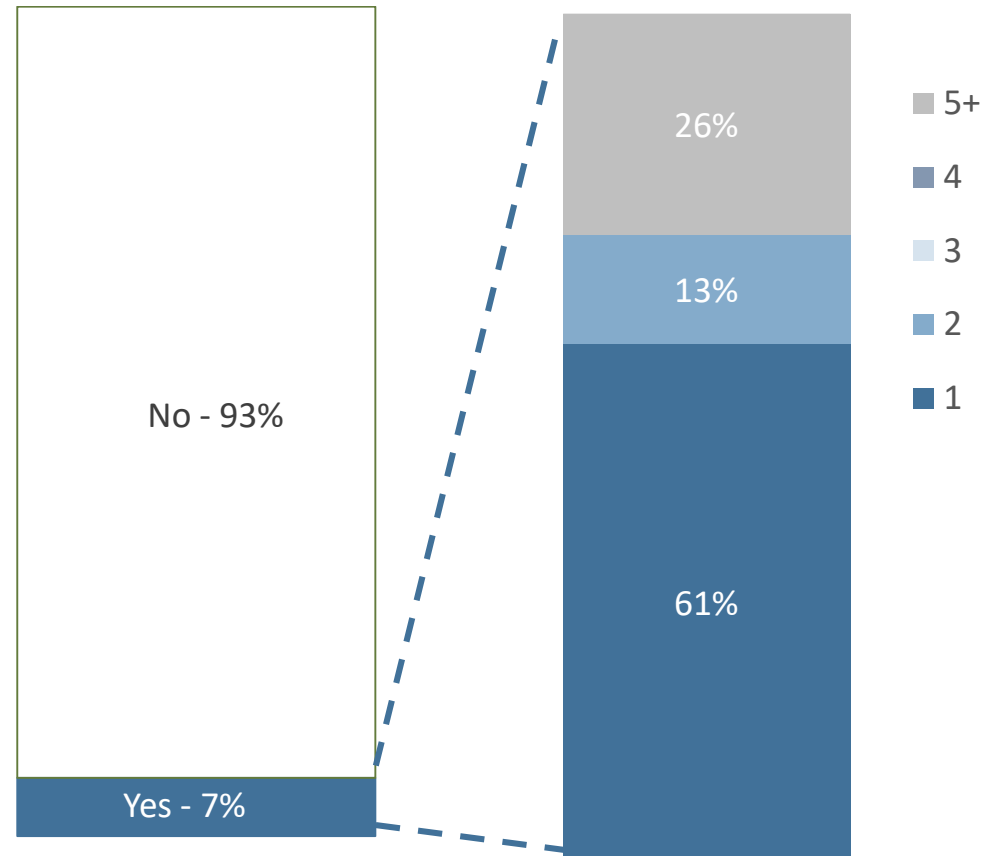
- Travel arrangements were made through a travel agent
- I made my own travel arrangements using the Internet
- Travel arrangements were made by others (business, friends, relatives)
- Travel arrangements were a mix of online booking and using a travel agent
- Other

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

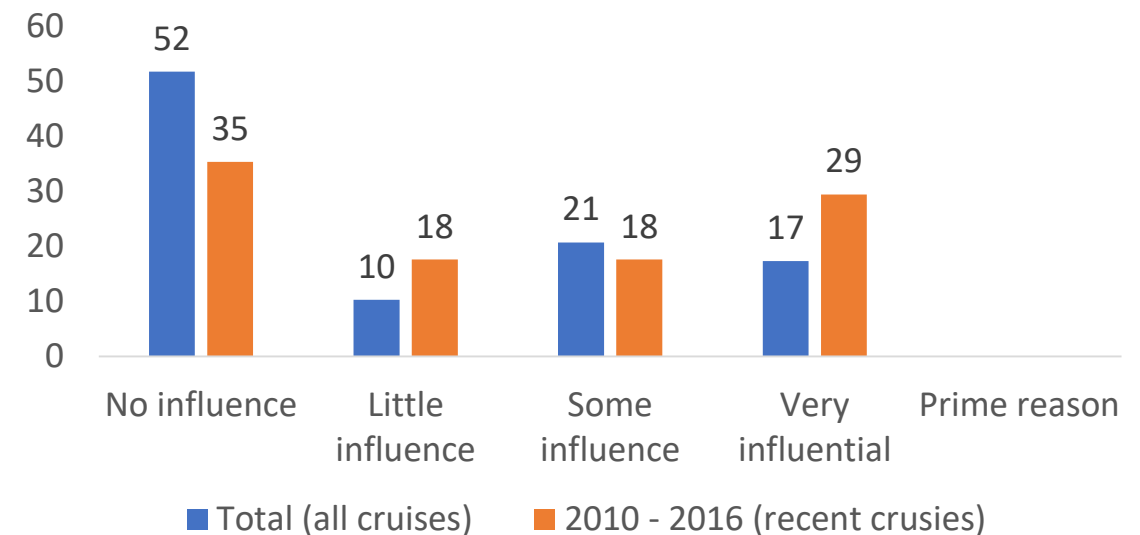
Cruise visits to PNG – Australia and New Zealand Holiday Visitors

Been on a cruise to PNG before?

If Yes, how many times?



Did a previous cruise influence your decision to come back?

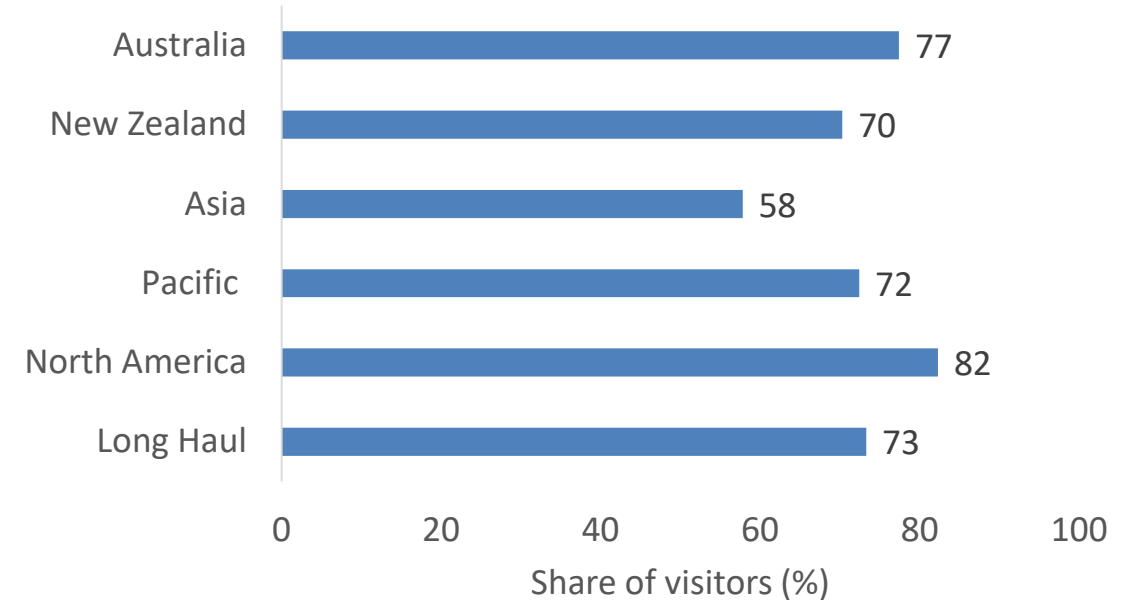
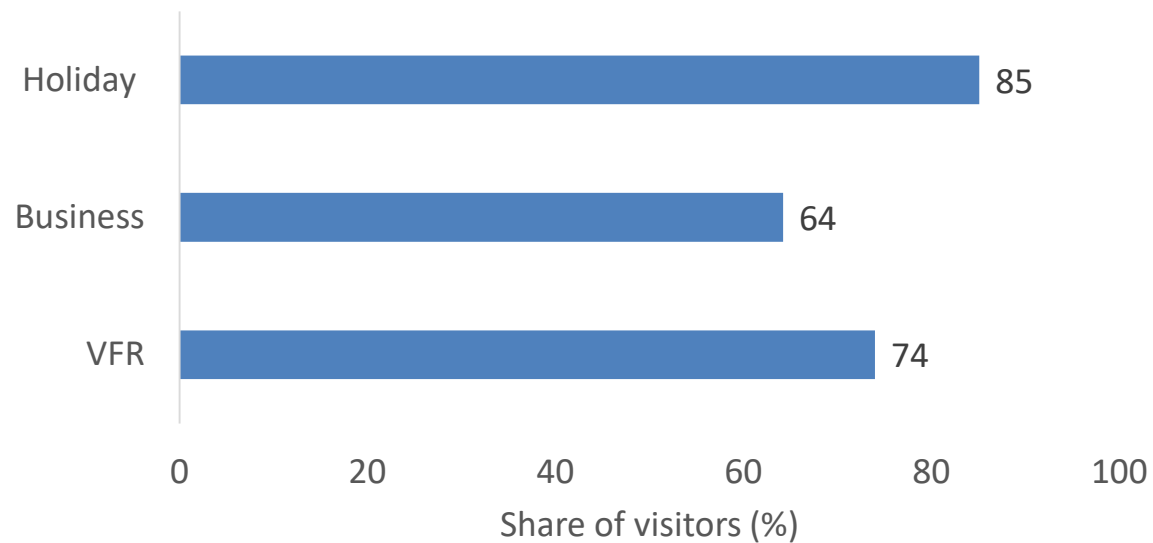


Presentation Structure



Visitor Satisfaction*

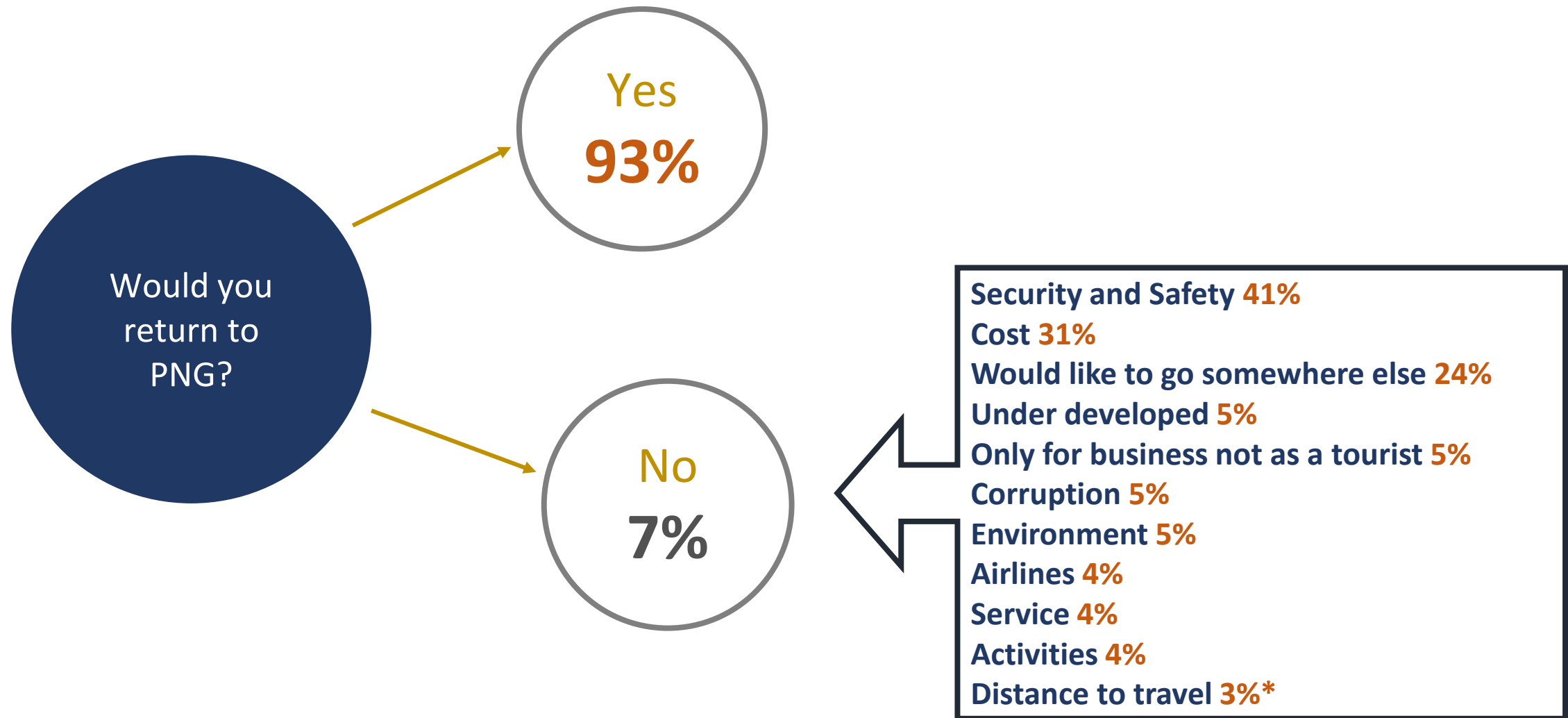
72% of total visitors were satisfied
76% of first time visitors were satisfied
70% repeat visitor were satisfied



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

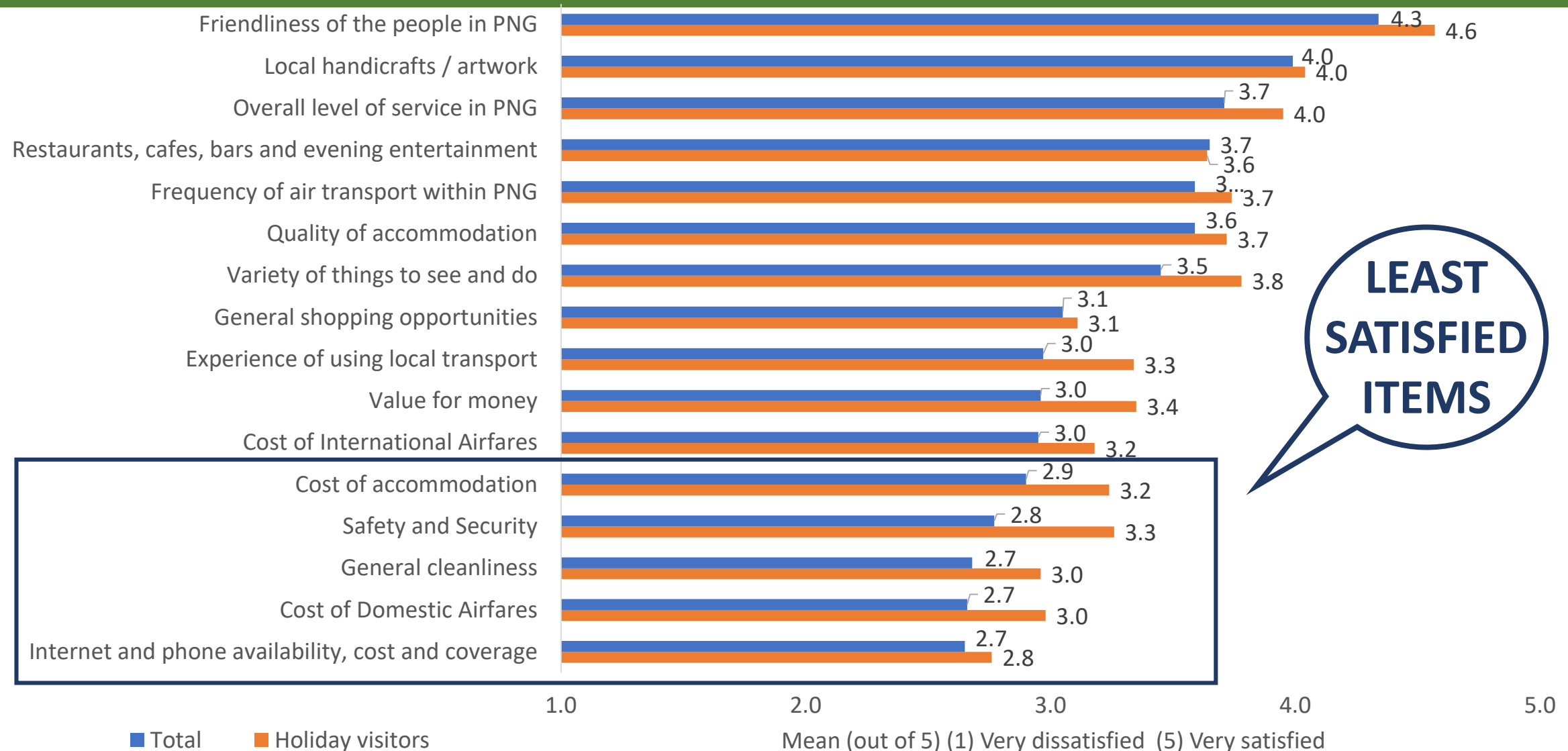
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Willingness to Return



* Other reasons have not been included due to low percentages.

Satisfaction with PNG – Holiday Visitors and Total Population

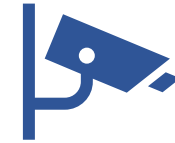


Least and Most Appealing – Overall and Holiday Visitors



Overall Most Appealing

42%	People
25%	Scenery or Landscape
21%	Activities and Attractions



Overall Least Appealing

34%	Safety and Security
24%	Environment and Rubbish
14%	Cost
14%	Infrastructure



Most Appealing - Holiday Visitor

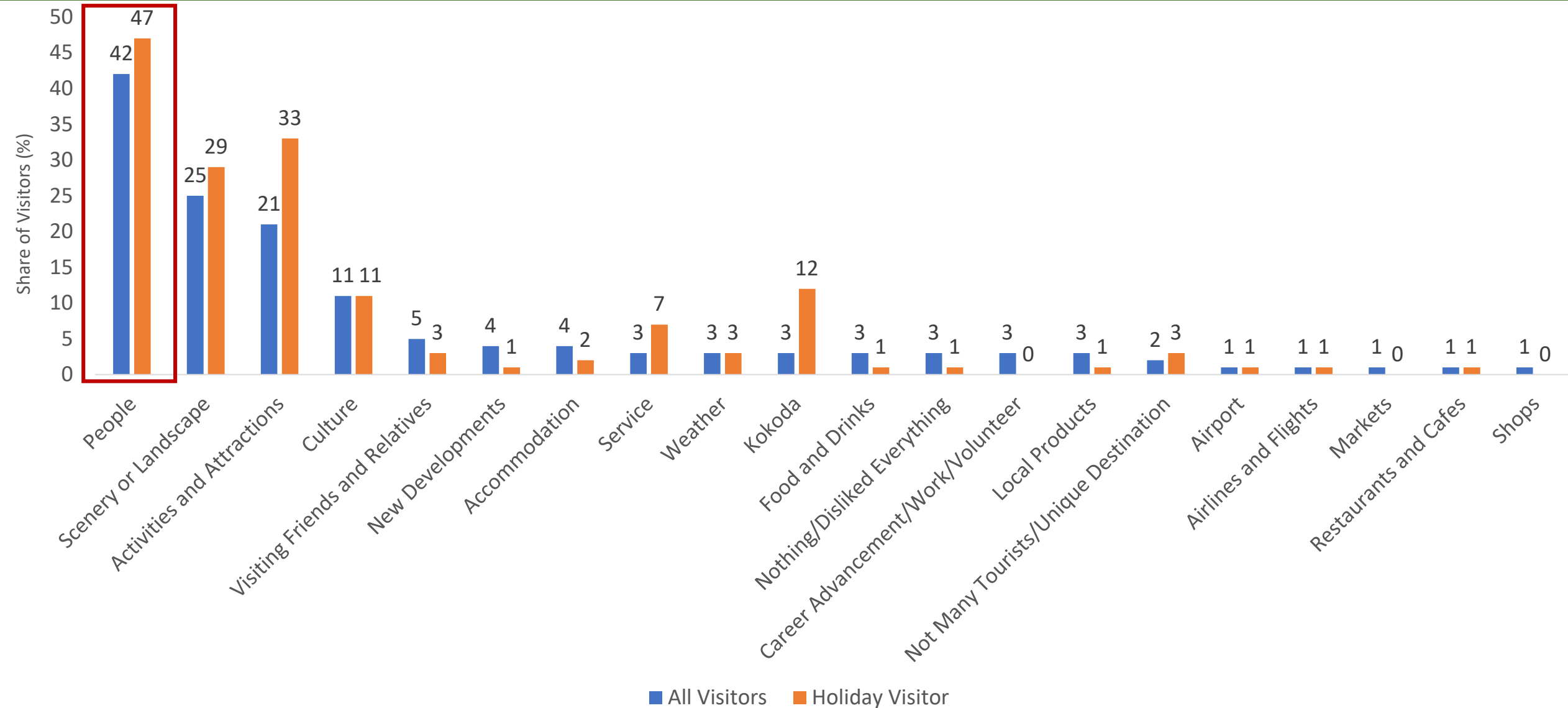
45%	People
31%	Activities and Attractions
28%	Scenery or Landscape



Least Appealing - Holiday Visitor

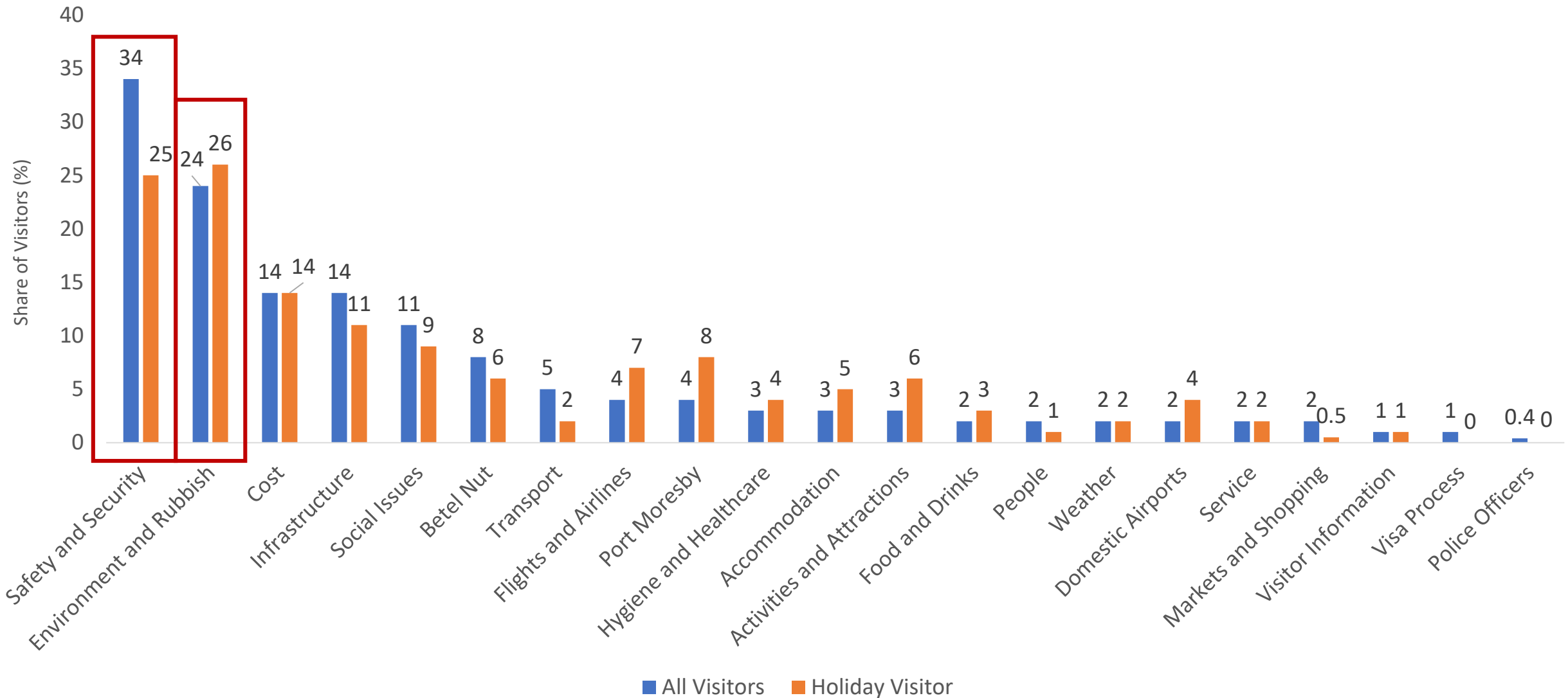
28%	Safety and Security
26%	Environment and Rubbish
13%	Cost
11%	Infrastructure

Most Appealing Aspects – All Visitors and Holiday Visitors



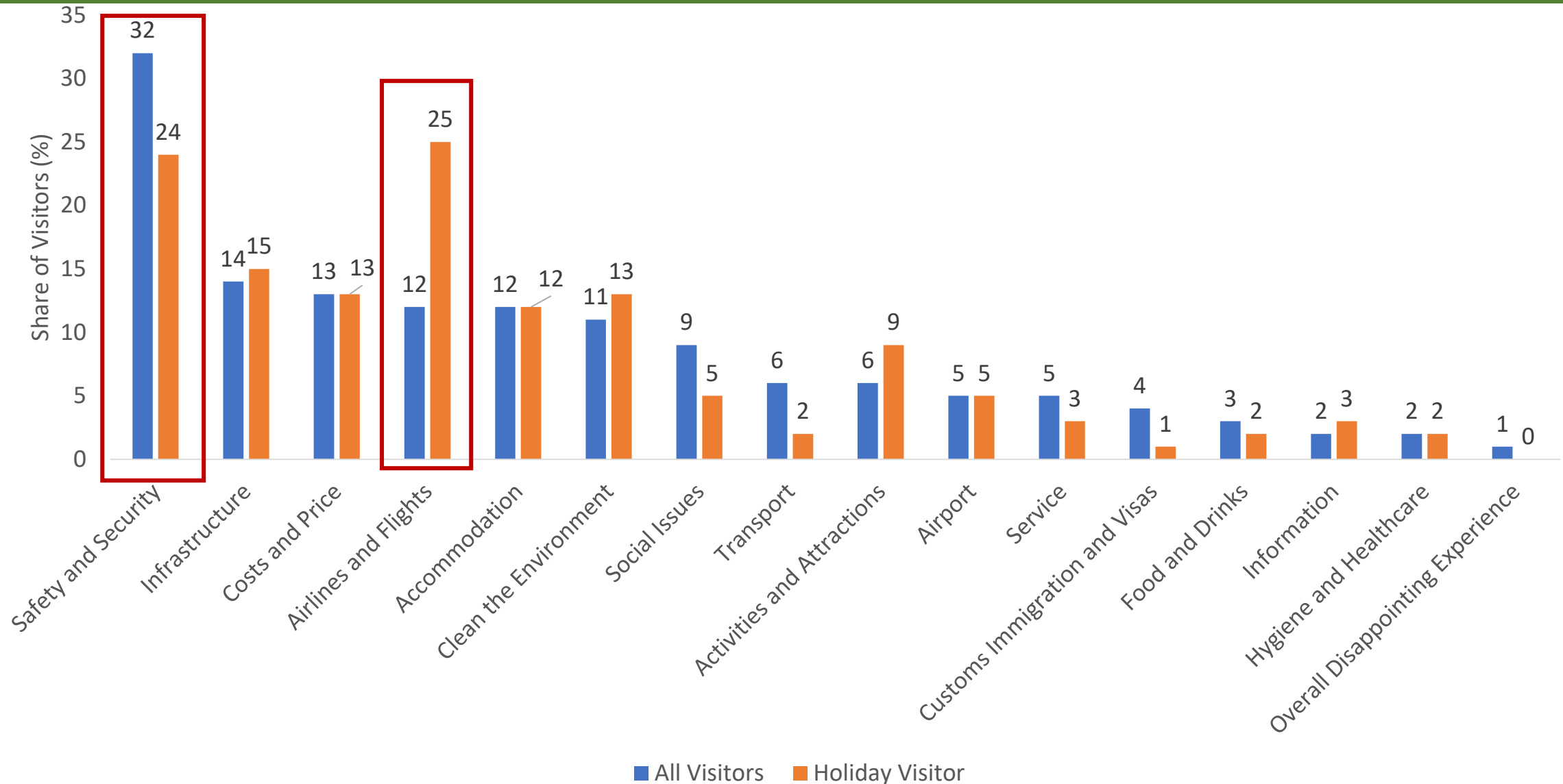
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Least Appealing Aspects – All Visitors and Holiday Visitors



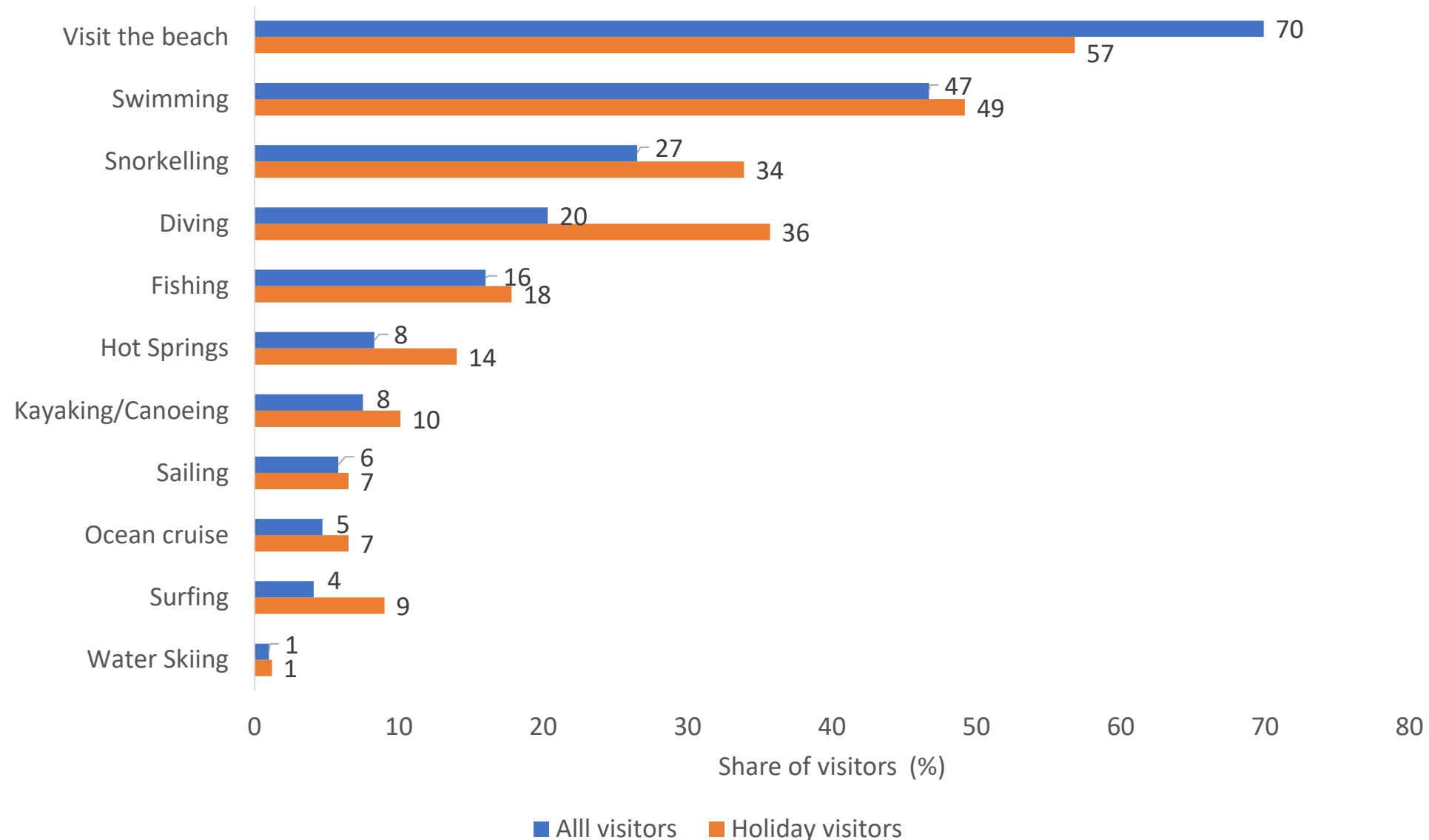
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Suggestions for Improvement – All Visitors and Holiday Visitors



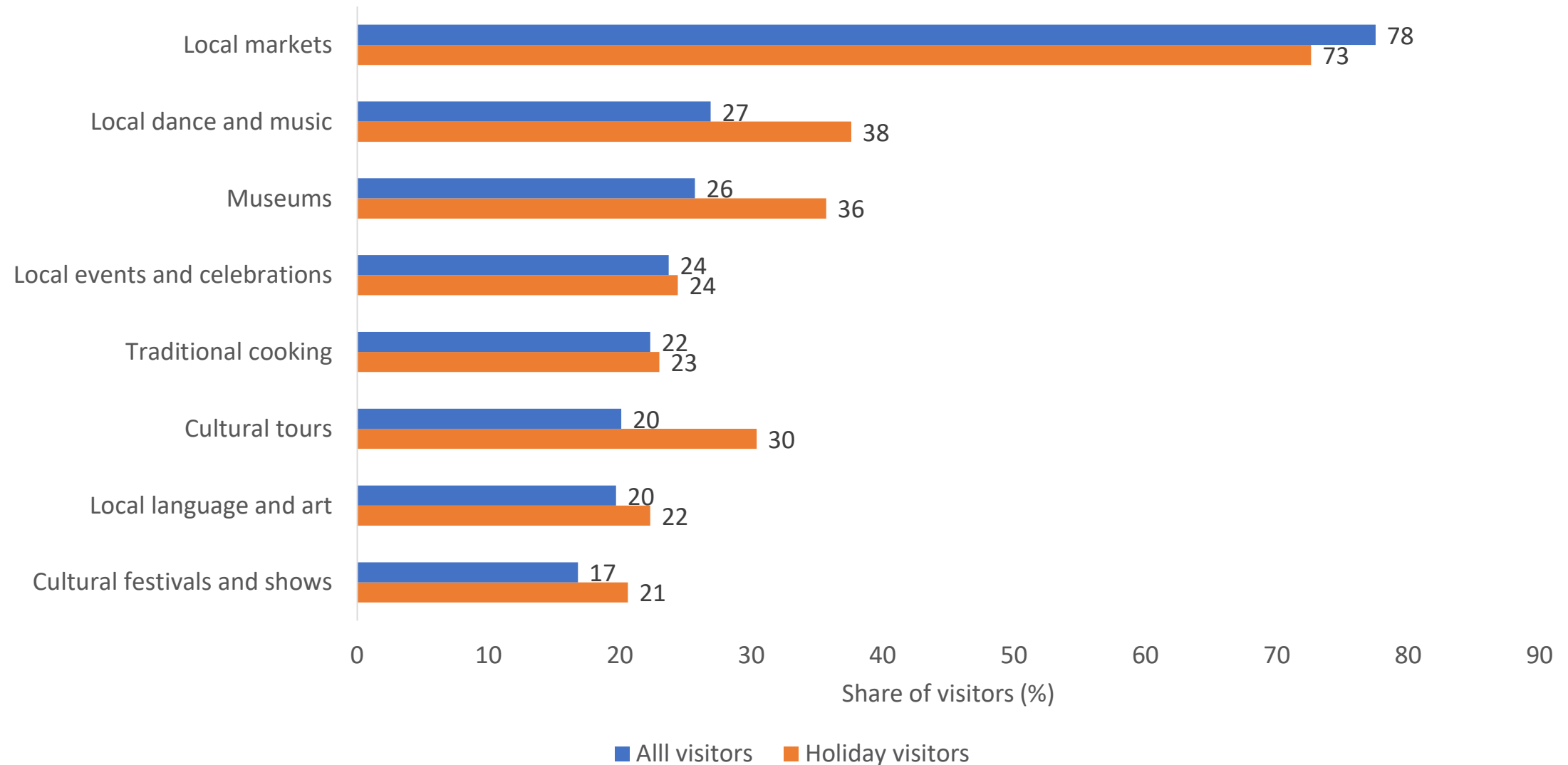
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Participation in Water Based Activities – All Visitors vs Holiday Visitors



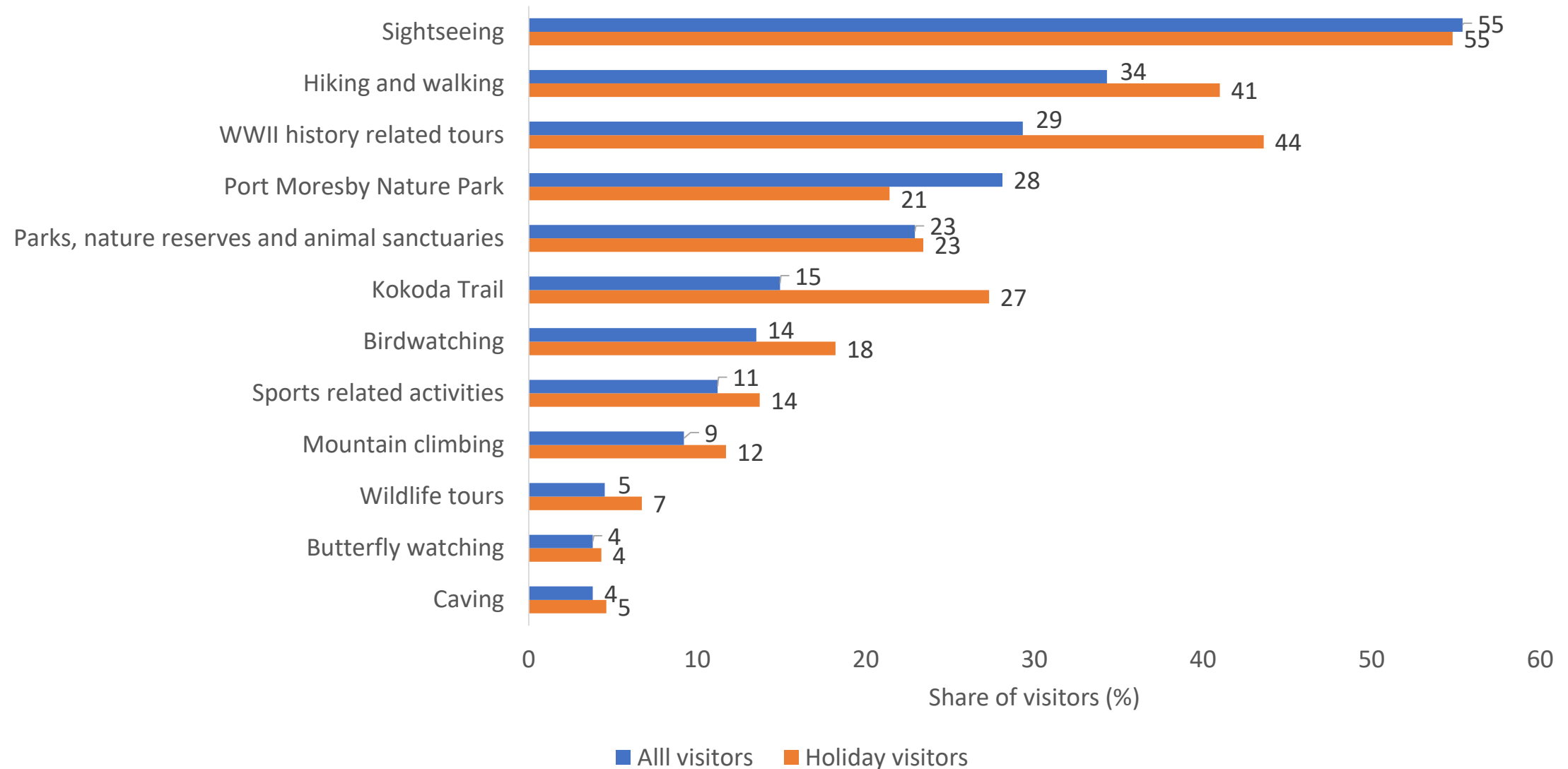
Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Participation in Cultural Based Activities – All Visitors vs Holiday Visitors



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Participation in Land Based Activities – All Visitors vs Holiday Visitors

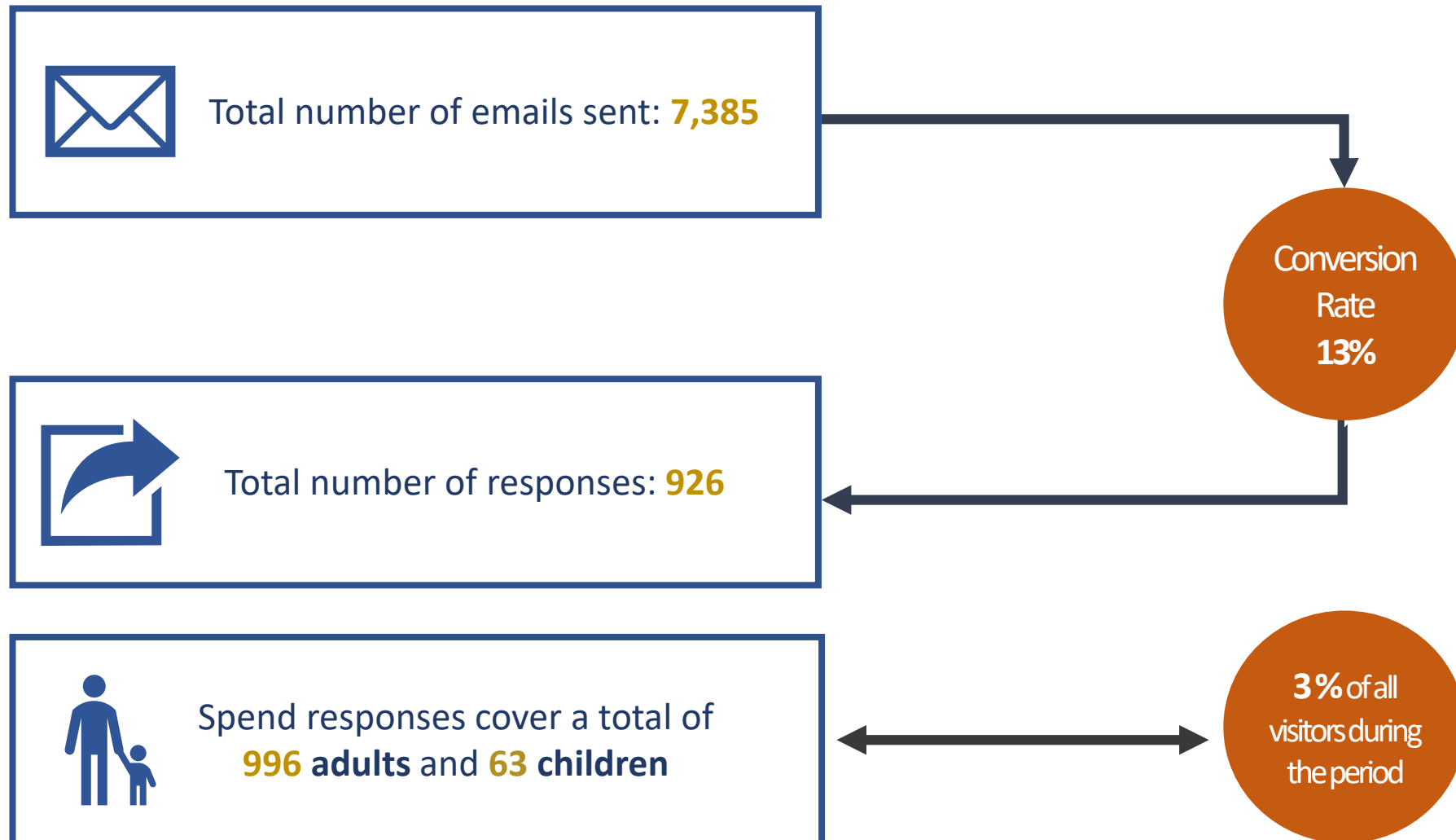


Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

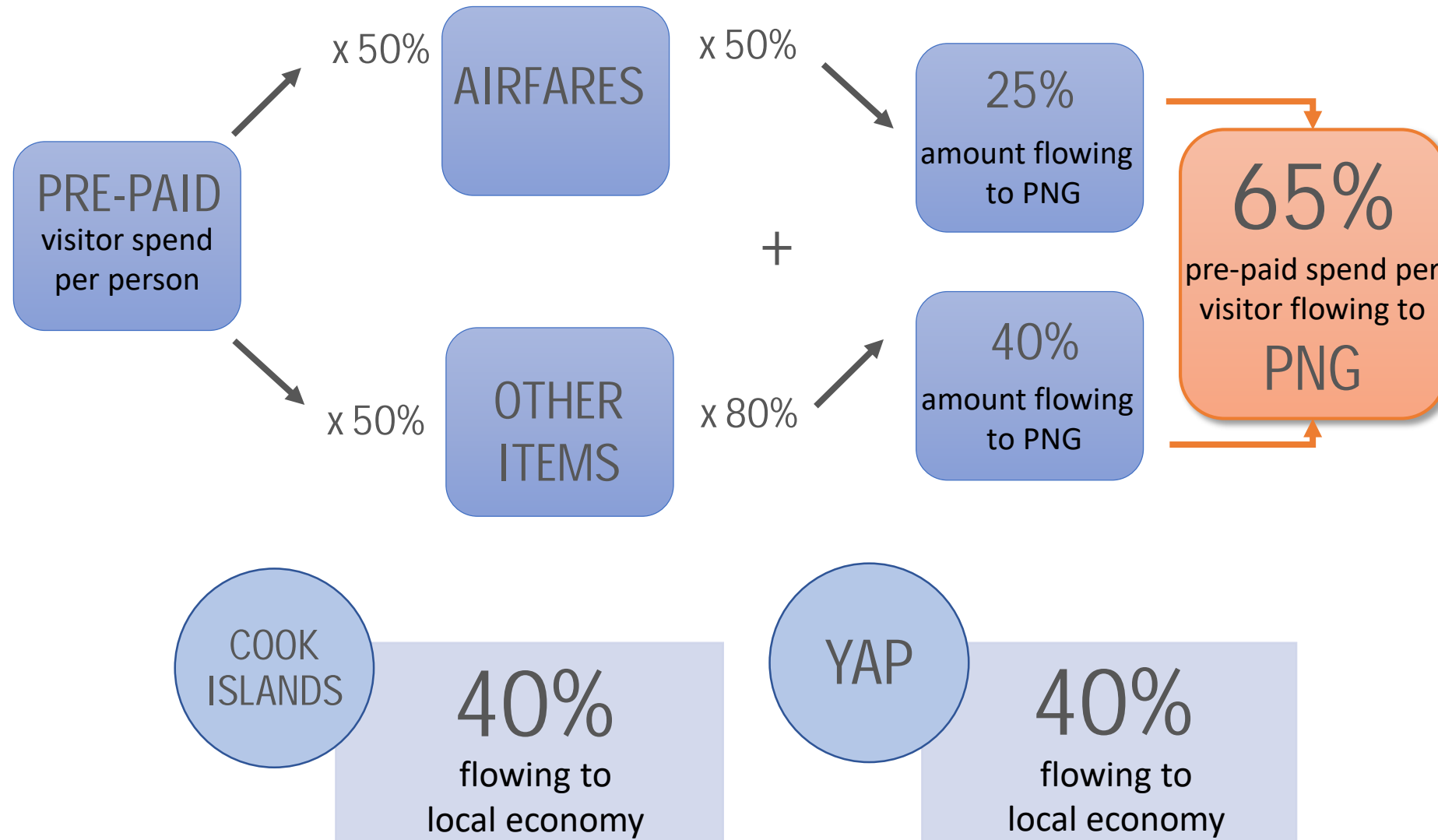
Presentation Structure



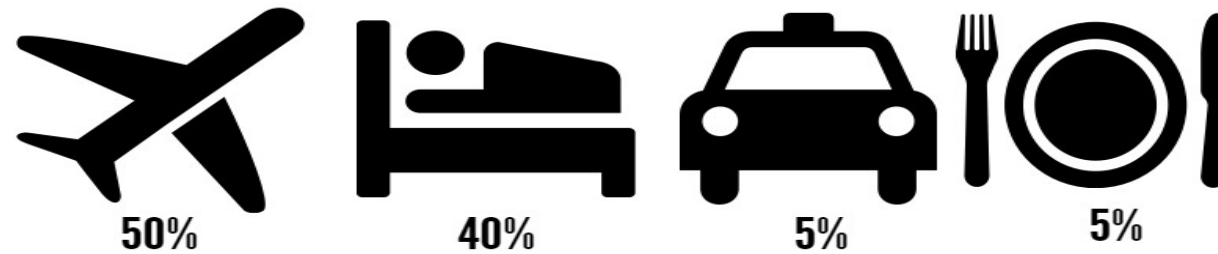
Respondents



Prior to Arrival Visitor Expenditure



Breakdown of Pre-Paid Spend

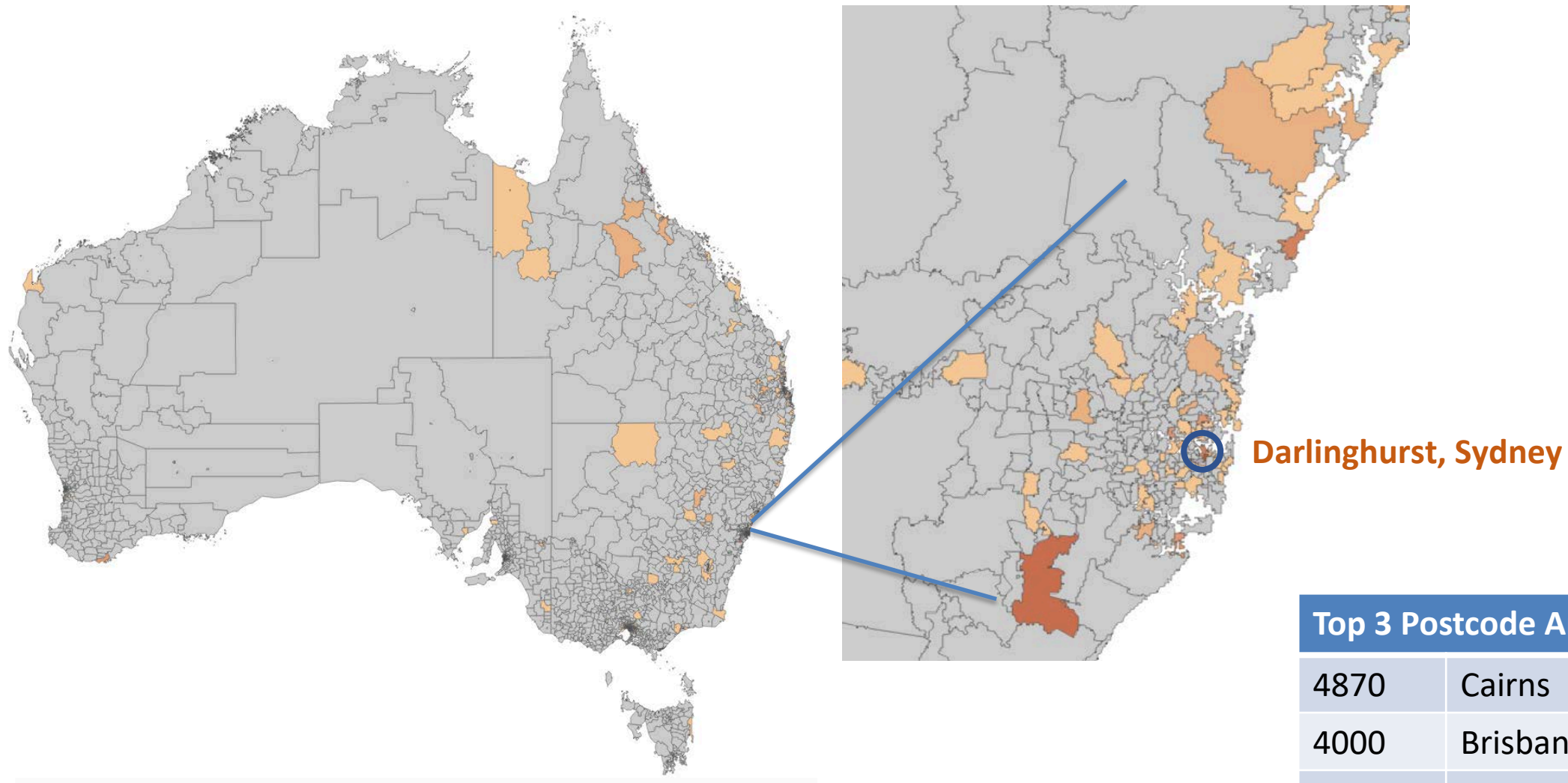


Thank You



ANNEX

Heat Maps – Australia

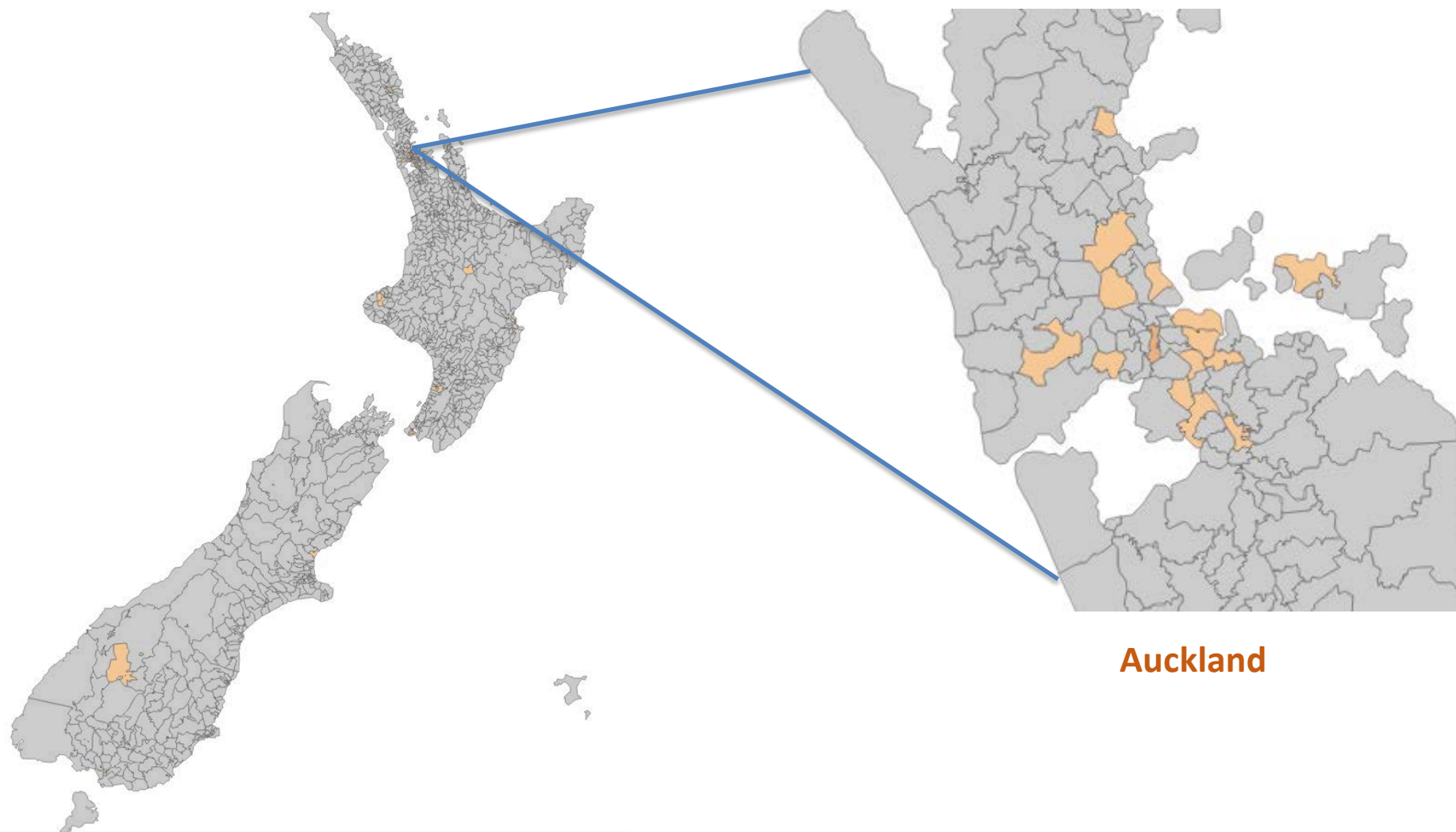


Top 3 Postcode Areas

4870	Cairns
4000	Brisbane
2010	Darlinghurst, Sydney

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

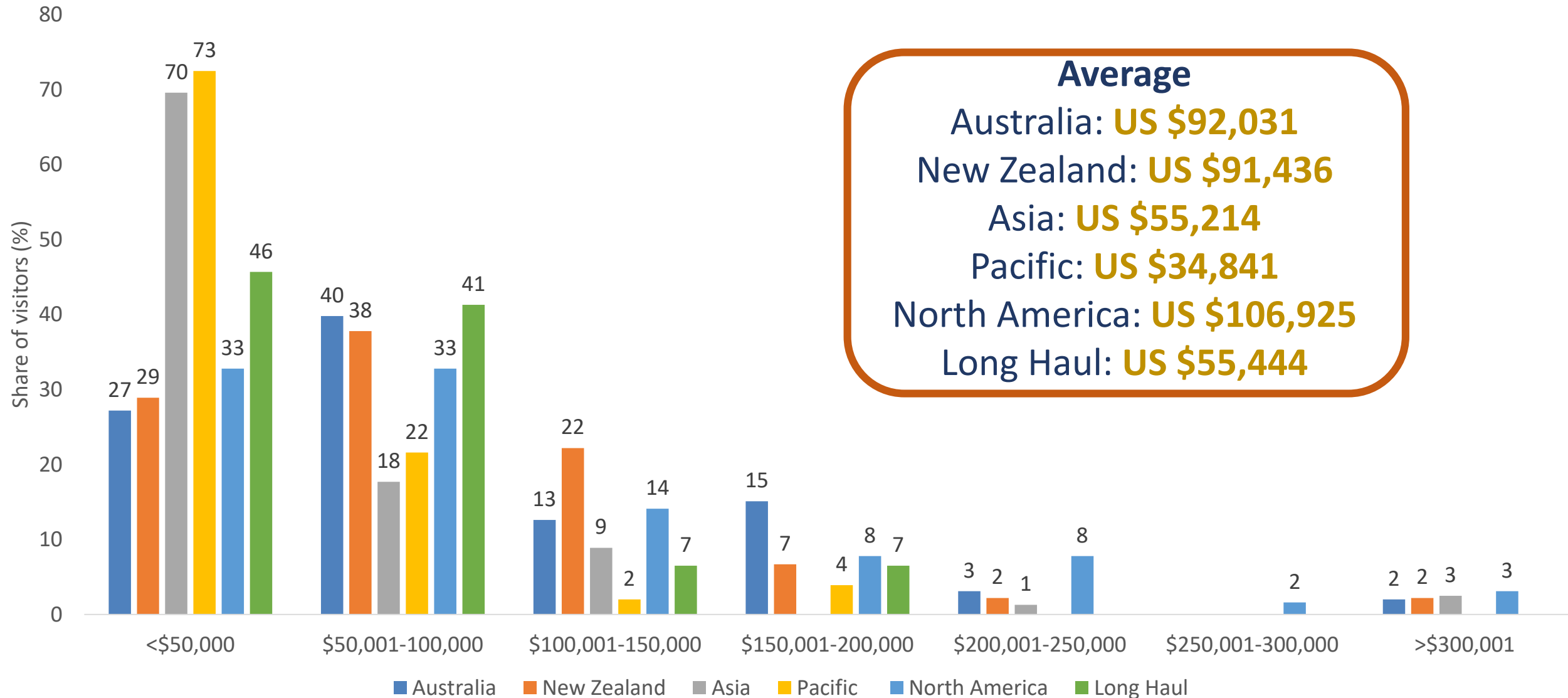
Heat Maps – New Zealand



Auckland

Annual Household Income – Country Segmentation

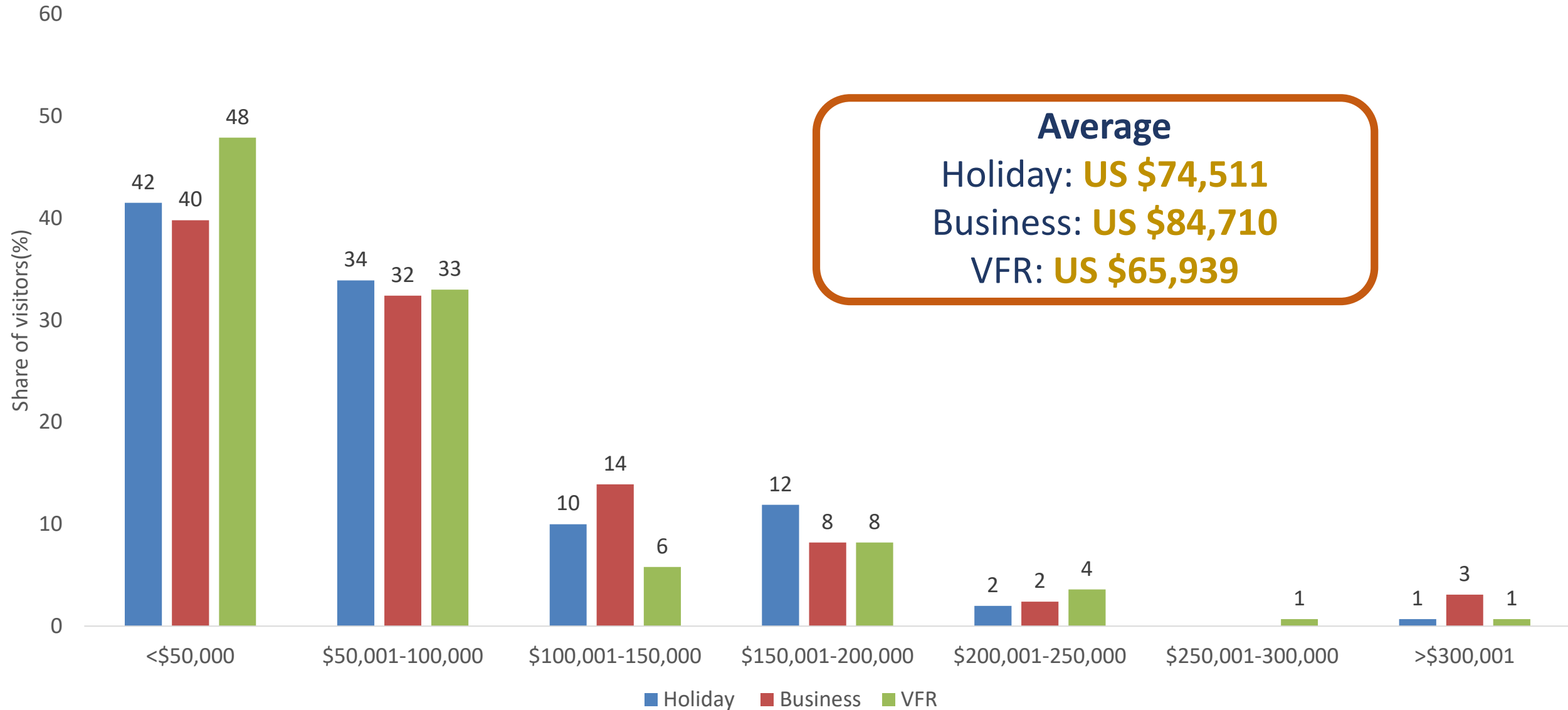
Annex



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Annual Household Income – Purpose of Visit Segmentation

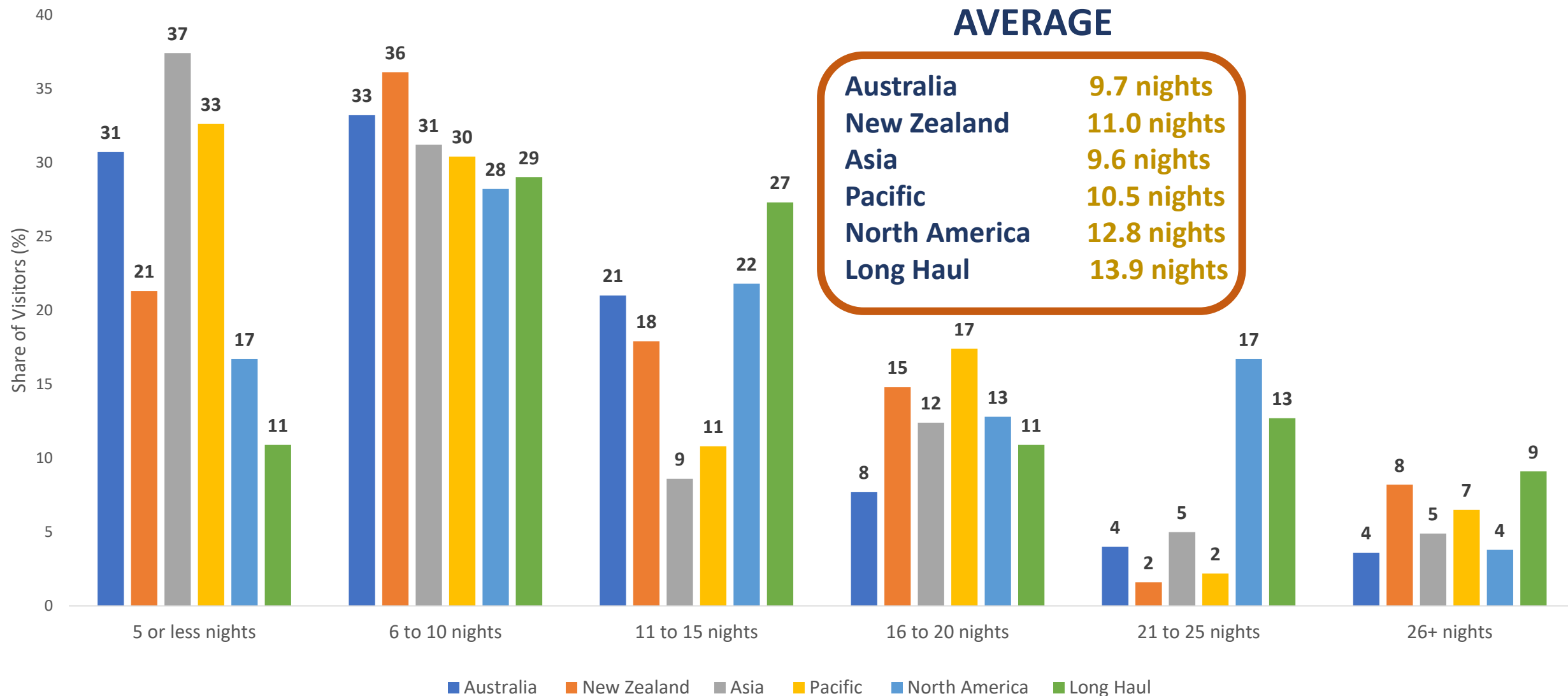
Annex



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

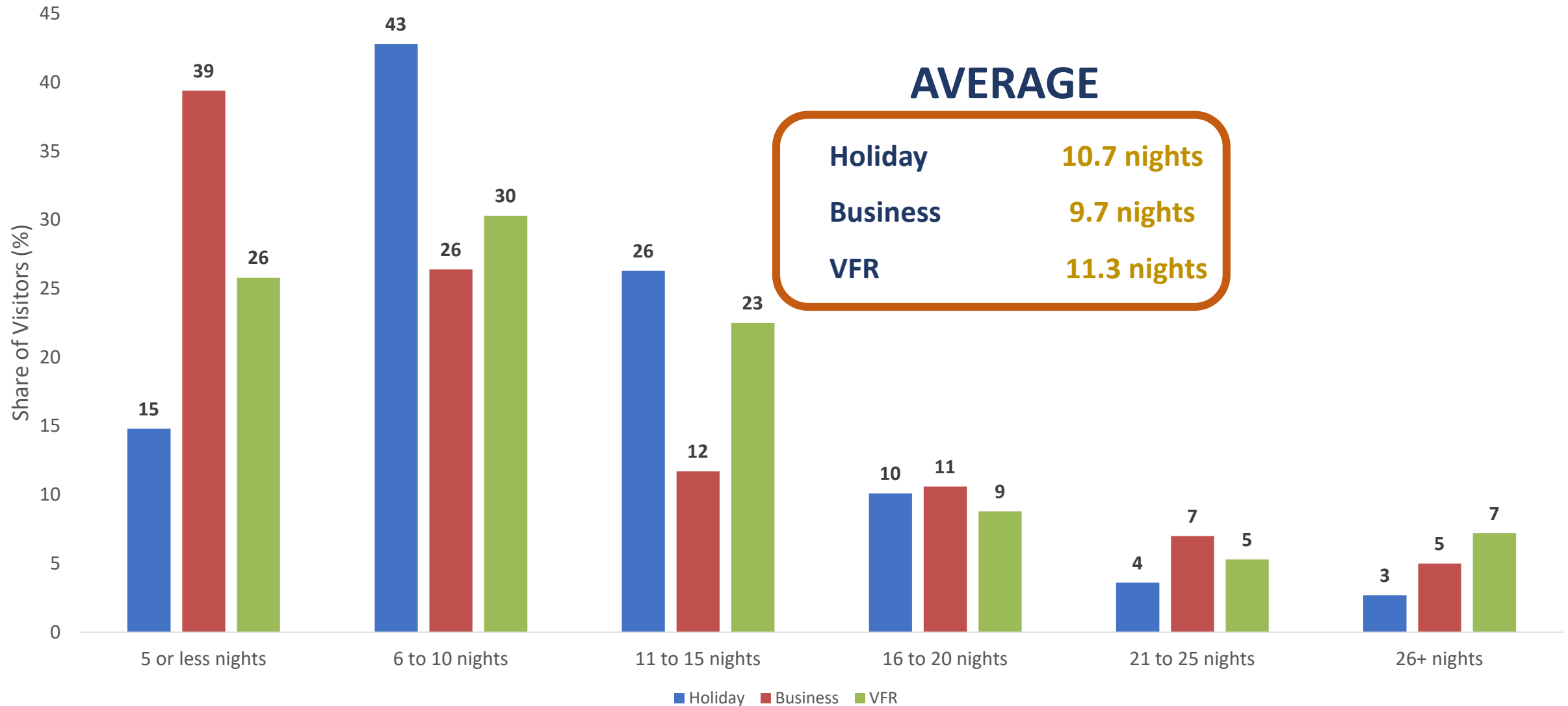
Length of Stay (nights) Breakdown - Country Segment

Visitor Characteristics
and Preferences



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

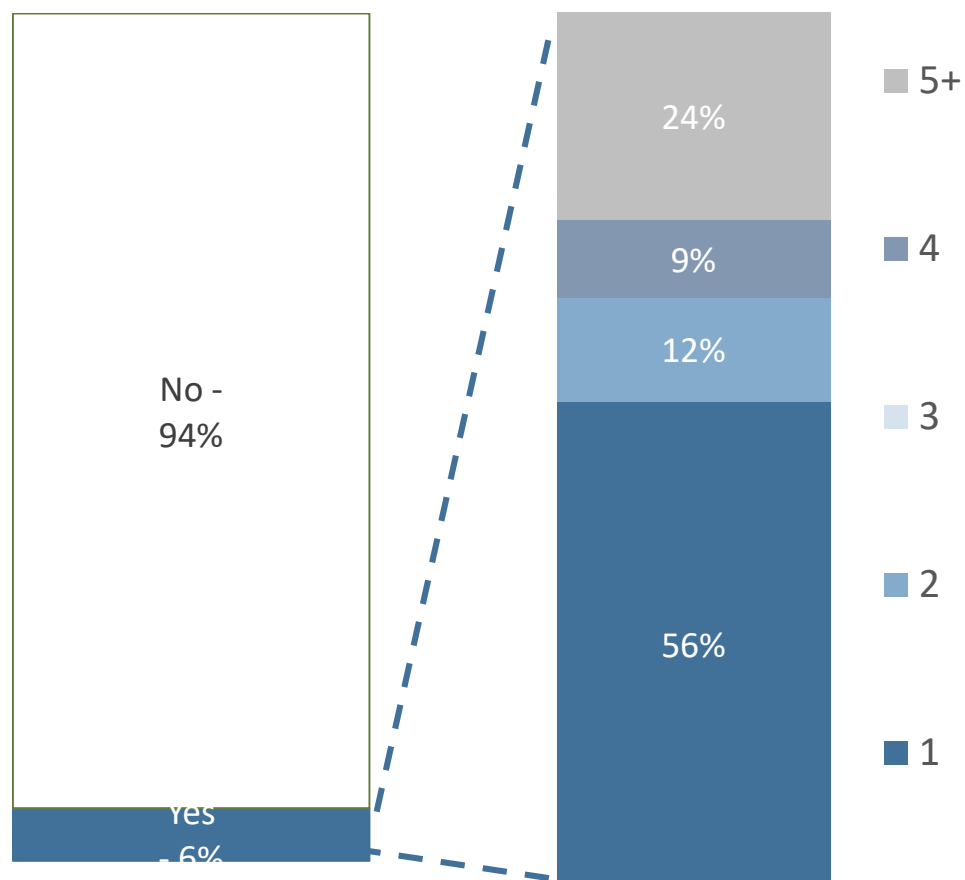
Length of Stay (nights) Breakdown – Purpose of visit



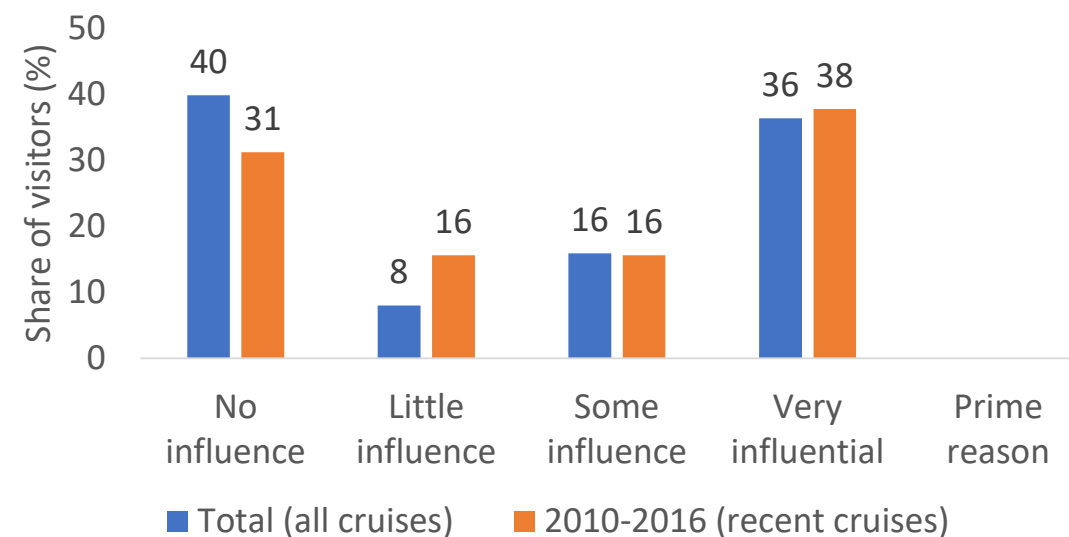
Cruise visits to PNG – Holiday Visitors

Been on a cruise to PNG before?

If Yes, how many times?



Did a previous cruise influence your decision to come back?



Influences on the Decision to Choose PNG (score out of 5) – Purpose of Visit Segmentation

Holiday	Culture and History 3.6	Natural Attractions/ Ecotourism/ Photography 3.1	Adventure Experiences 3.0	Snorkelling and Diving 2.4
Business	Business/Conference 4.4	Culture and history 2.2	Natural Attractions/ Ecotourism/ Photography 2.2	Friends and Family in PNG 2.0
VFR	Friends and Family in PNG 4.8	Culture and History 2.8	Natural Attractions/ Ecotourism/ Photography 2.7	Relaxing Atmosphere/ Warm climate 2.4

Degree of Satisfaction – Country Segmentations

	Australia	New Zealand	Asia	Pacific	North America	Long Haul
Friendliness of the people in PNG	4.5	4.0	4.1	3.5	4.7	4.5
Local handicrafts / artwork	4.1	3.8	4.0	4.0	4.1	3.6
Overall level of service in PNG	3.9	3.5	3.5	3.4	3.9	3.4
Restaurants, cafes, bars and evening entertainment	3.8	3.4	3.5	3.7	3.6	3.2
Frequency of air transport within PNG	3.8	3.5	3.2	3.9	3.7	3.4
Quality of accommodation	3.8	3.4	3.2	3.8	3.7	3.4
Variety of things to see and do	3.5	3.3	3.2	3.3	3.8	3.7
Cost of International Airfares	3.3	3.0	2.3	3.1	3.1	2.5
Cost of accommodation	3.2	2.4	2.4	3.0	3.3	2.4
Value for money	3.2	2.6	2.6	2.8	3.3	2.7
Experience of using local transport	3.1	3.1	3.1	2.6	3.4	3.0
General shopping opportunities	3.1	2.7	2.7	3.2	3.3	2.7
Safety and Security	3.0	2.7	2.7	2.5	2.8	2.9
Cost of Domestic Airfares	2.9	2.3	2.3	2.7	3.1	2.5
General Cleanliness	2.8	2.3	2.3	2.4	2.8	2.7
Internet and Phone Availability, Cost and Coverage	2.7	2.5	2.5	3.0	2.8	2.4

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Degree of Satisfaction – Purpose of Visit

	Holiday	Business	VFR
Friendliness of the people in PNG	4.6	4.2	4.3
Local handicrafts / artwork	4.0	3.9	4.2
Overall level of service in PNG	4.0	3.6	3.6
Variety of things to see and do	3.8	3.2	3.4
Frequency of air transport within PNG	3.7	3.5	3.6
Quality of accommodation	3.7	3.5	3.5
Restaurants, cafes, bars and evening entertainment	3.6	3.6	3.9
Value for money	3.4	2.7	2.9
Experience of using local transport	3.3	2.8	2.8
Safety and Security	3.3	2.6	2.6
Cost of accommodation	3.2	2.7	2.8
Cost of International Airfares	3.2	2.8	2.8
General shopping opportunities	3.1	2.9	3.2
Cost of Domestic Airfares	3.0	2.5	2.4
General cleanliness	3.0	2.6	2.4
Internet and phone availability, cost and coverage.	2.8	2.6	2.5

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Expenditure by Visitor Type

	Holiday	Business	VFR	Overall Average
Average Spend Prior to arrival				
Per Person - Whole Trip	\$3,018	\$1,857	\$1,173	\$2,180
Flowing into local economy - Estimated 65% of the pre-paid spend flows into the PNG economy				
Per Person - Whole Trip	\$1,961	\$1,207	\$763	\$1,417
Per Person per Day	\$183	\$124	\$68	\$137
Length of stay	10.7 nights	9.7 nights	11.3 nights	10.3 nights
Average Spend while in PNG				
Per Person - Whole Trip	\$1,227	\$1,303	\$771	\$1,141
Per Person per Day	\$115	\$134	\$69	\$110
Total spend flowing into PNG economy – Whole Trip	\$3,188	\$2,510	\$1,534	\$2,558
Total spend flowing into PNG economy – Per Day	\$298	\$258	\$137	\$247

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Expenditure by Market

	Australia	New Zealand	Asia	Pacific	North America	Long Haul	Overall Average
Average Spend Prior to arrival							
Per Person - Whole Trip	\$1,902	\$1,683	\$2,400	\$1,827	\$3,160	\$3,923	\$2,180
Flowing into local economy - Estimated 65% of the pre-paid spend flows into the PNG economy							
Per Person - Whole Trip	\$1,236	\$1,094	\$1,560	\$1,188	\$2,054	\$2,550	\$1,417
Per Person per Day	\$127	\$99	\$163	\$113	\$161	\$184	\$137
Length of stay	9.7 nights	11.0 nights	9.6 nights	10.5 nights	12.8 nights	13.9 nights	10.3 nights
Average Spend while in PNG							
Per Person - Whole Trip	\$966	\$934	\$1,529	\$1,058	\$1,396	\$1,333	\$1,141
Per Person per Day	\$100	\$85	\$159	\$100	\$109	\$96	\$110
Total spend flowing into PNG economy – Whole Trip	\$2,202	\$2,028	\$3,089	\$2,246	\$3,450	\$3,883	\$2,558
Total spend flowing into PNG economy – Per Day	\$227	\$184	\$322	\$213	\$270	\$280	\$247

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Expenditure by Purpose of Visit

Expenditure Items	Holiday	Business	VFR
Accommodation	35	68	19
Tours/Tour Operator Services	31	1	1
Domestic Travel	16	13	11
Food & Beverage	14	25	12
Other	7	3	4
Retail	5	8	10
Souvenirs	3	3	5
Local Transport	2	10	3
Internet & Service	2	4	3
Total expenditure (US\$)	\$115	\$134	\$69

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Least and Most Appealing – Business and First Time Holiday Visitors



Most Appealing - Business Visitor

43%	People
23%	Scenery or Landscape
16%	Activities and Attractions



Least Appealing - Business Visitor

37%	Safety and Security
17%	Environment and Rubbish
15%	Cost



Most Appealing - First Time Holiday Visitor

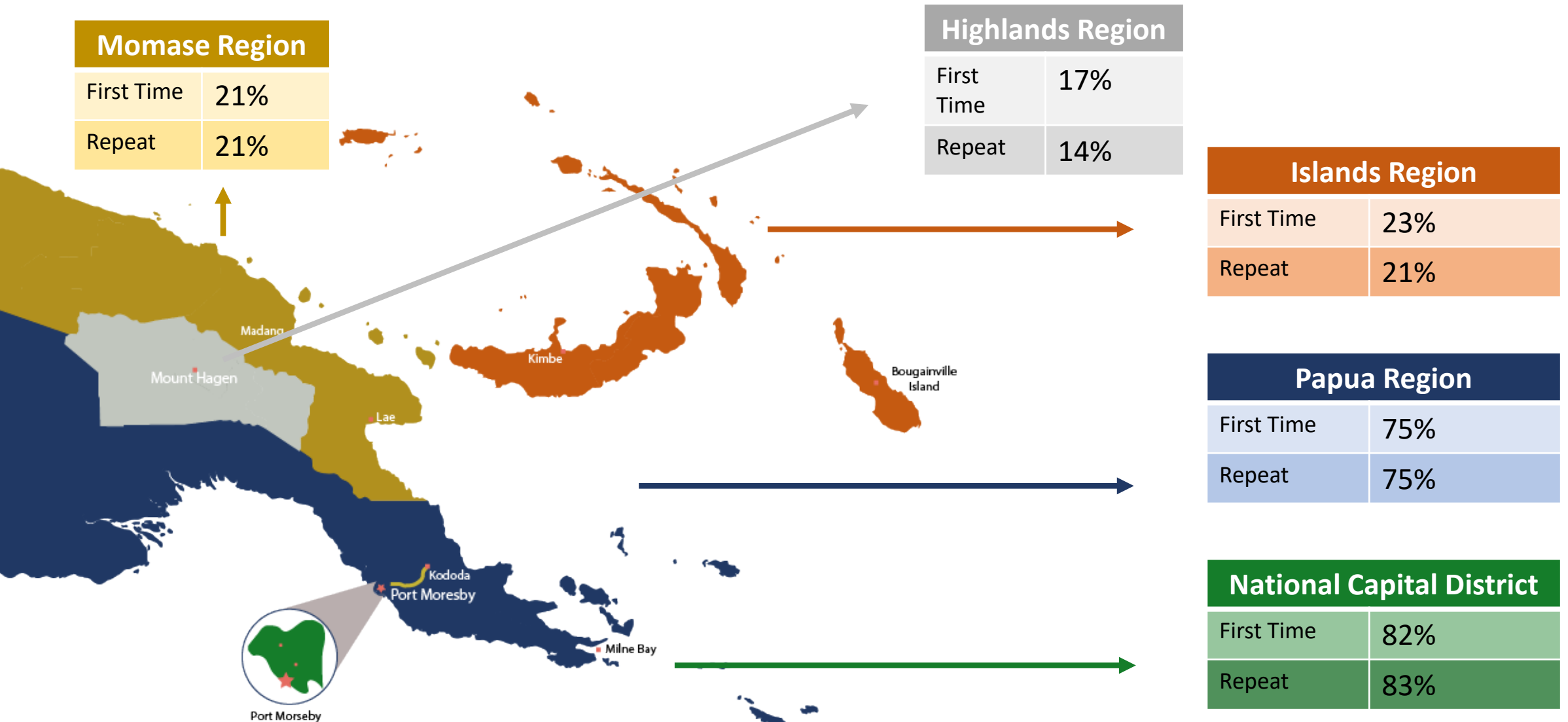
46%	People
31%	Scenery or Landscape
16%	Culture



Least Appealing - First Time Holiday Visitor

43%	Safety and Security
19%	Environment and Rubbish
14%	Social Issues

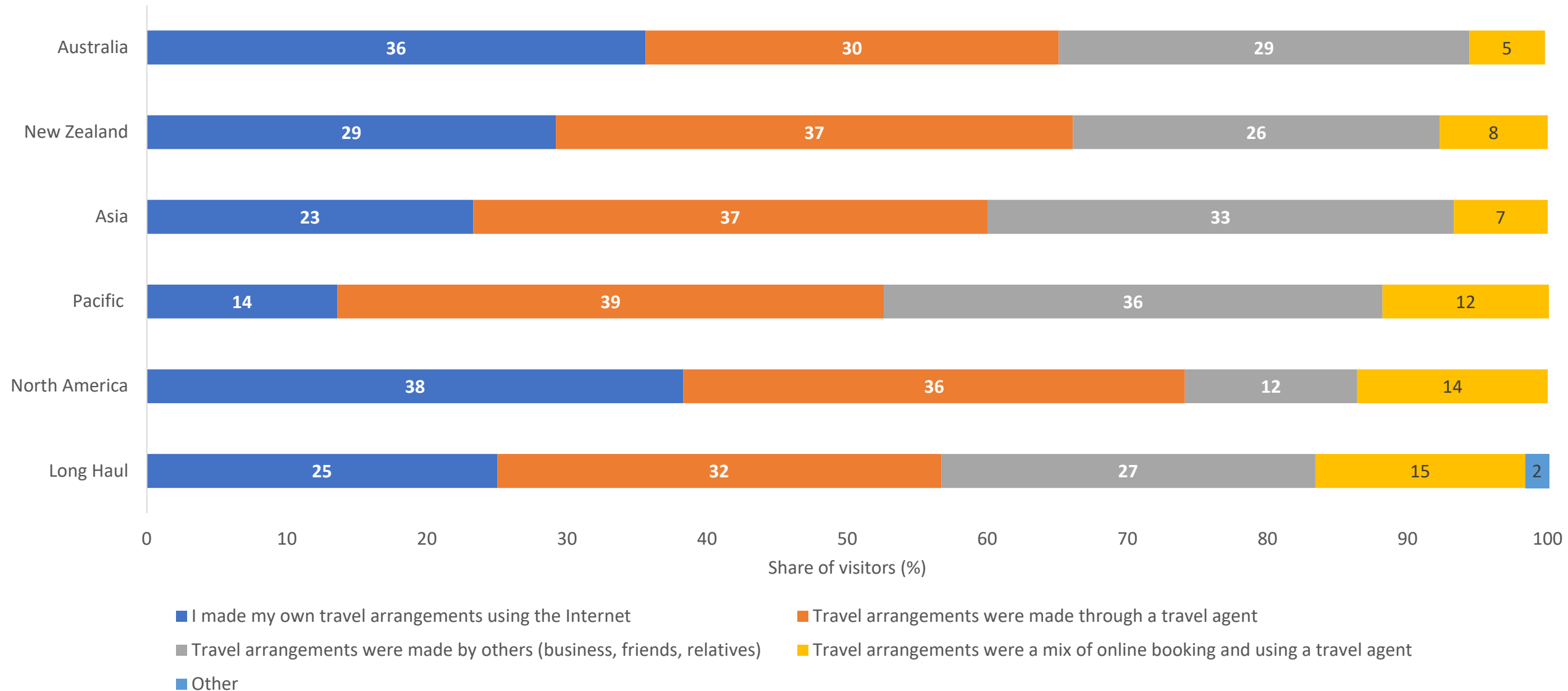
Visiting each PNG Region - Repeat and First Time Visitors



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

Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.

Travel Purchasing Behaviour – Country Segmentation



Note: these are provisional figures, slight adjustments maybe made at the annual 2017 presentation.