

Papua New Guinea International Visitor Survey



January – December 2017

Simon Milne



Papua New Guinea Tourism Project

Project Objectives

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 upcoming tourism lending program.

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.

Papua New Guinea Tourism Project

International Visitors Survey

- 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.

Summary of the Key Findings

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Total Direct Economic Impact for Jan-Dec 2017

Figures exclude employment and cruise visitors

US \$204.8 Million flowing back to the PNG economy

from a total of 86,403 visitors

US \$2,371 spend per visitor per trip

US \$231 per visitor per day

PGK 670.9 million flowing back to the PNG economy

PGK 7,767 spend per visitor per trip


PGK 757 per visitor per day

Summary of the Key Findings

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Total Direct Economic Impact for Jan-Dec 2017

Figures exclude employment and cruise visitors

| | East New Britain Visitor | Milne Bay Province Visitor | National Capital District Visitor |
|-------------------------------------------------------------------------------------------------|--------------------------|----------------------------|-----------------------------------|
|  Per Day | US \$263 PGK 861 | US \$259 PGK 848 | US \$244 PGK 800 |
|  Whole Trip | US \$3,208 PGK 10,509 | US \$3,189 PGK 10,442 | US \$2,304 PGK 7,548 |

Summary of the Key Findings

Respondent Profile and Characteristics

- 63% from AU/NZ
- 55% under 50 years
- 64% male
- 74% - household income less than US \$100,000

Decision Making

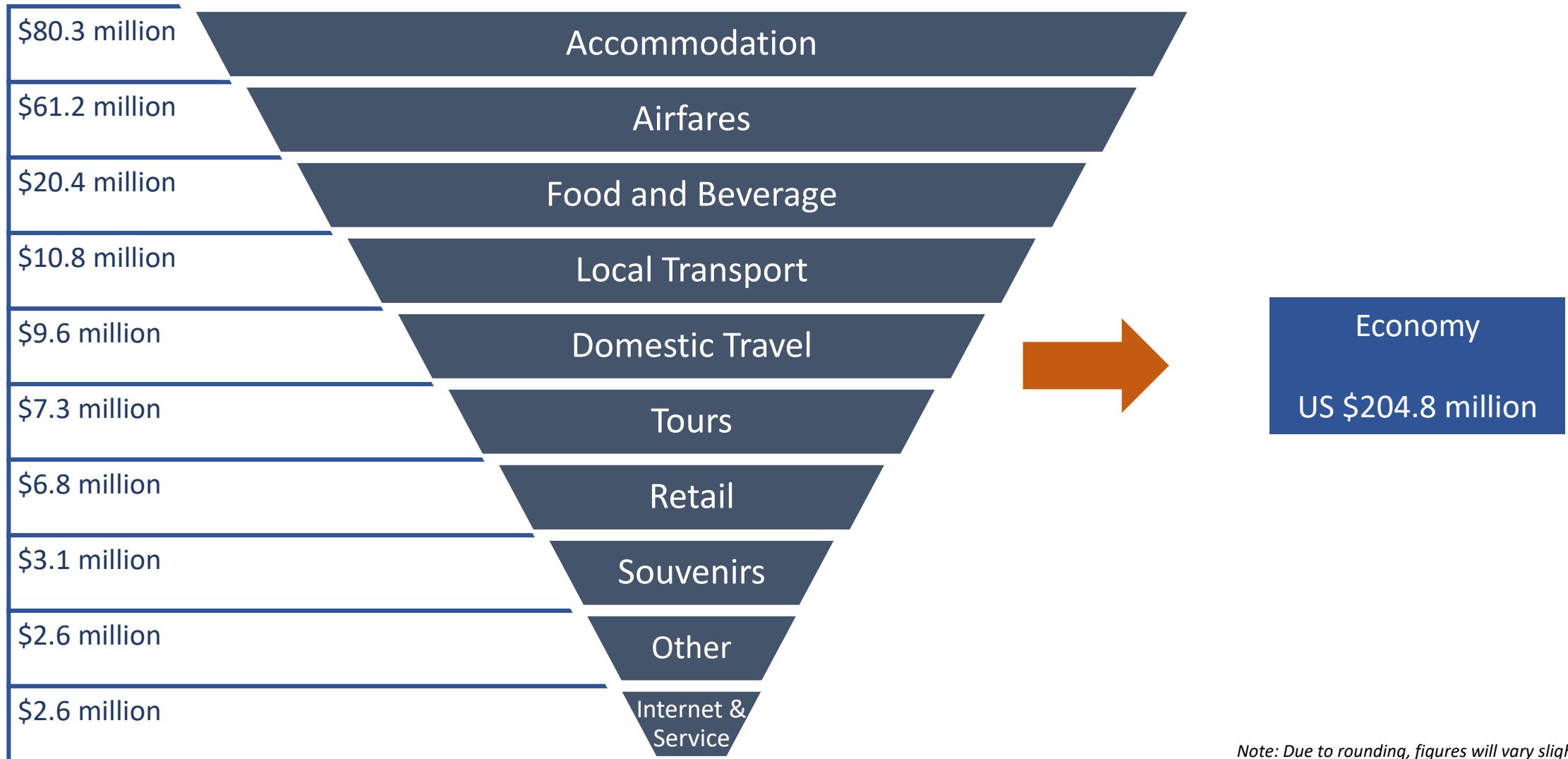
- Culture and History was the top influencing reason for holiday visitors to choose PNG
- Top 3 sources holiday visitors use to plan:
 - Friends and family
 - Travel agent/brochures
 - Internet

Satisfaction

- 92% would return
- 74% are satisfied
- 43% of Holiday visitors are most satisfied with People
- 28% Holiday visitors are least satisfied with Safety and Security

Direct Economic Impact – Spend in Country and Prior to Arrival

7



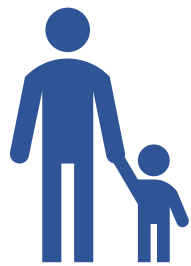
*Note: Due to rounding, figures will vary slightly.
Spend figures are in USD*

Presentation Structure



Visitor Characteristics – IVS Respondent Data

9



Responses

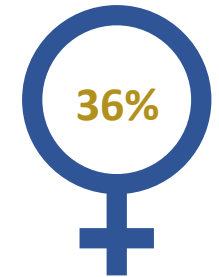
2132 Number of respondents



Household Income (USD)

40% Under \$50,000
34% \$50,000-\$100,000
26% Over \$100,001

Gender



Females



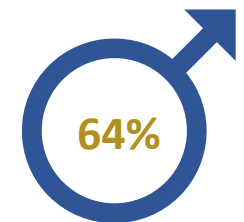
Age

13% 18-29 years old
18% 30-39 years old
24% 40-49 years old
22% 50-59 years old
18% 60-69 years old
5% 70+ years old



Country of Origin

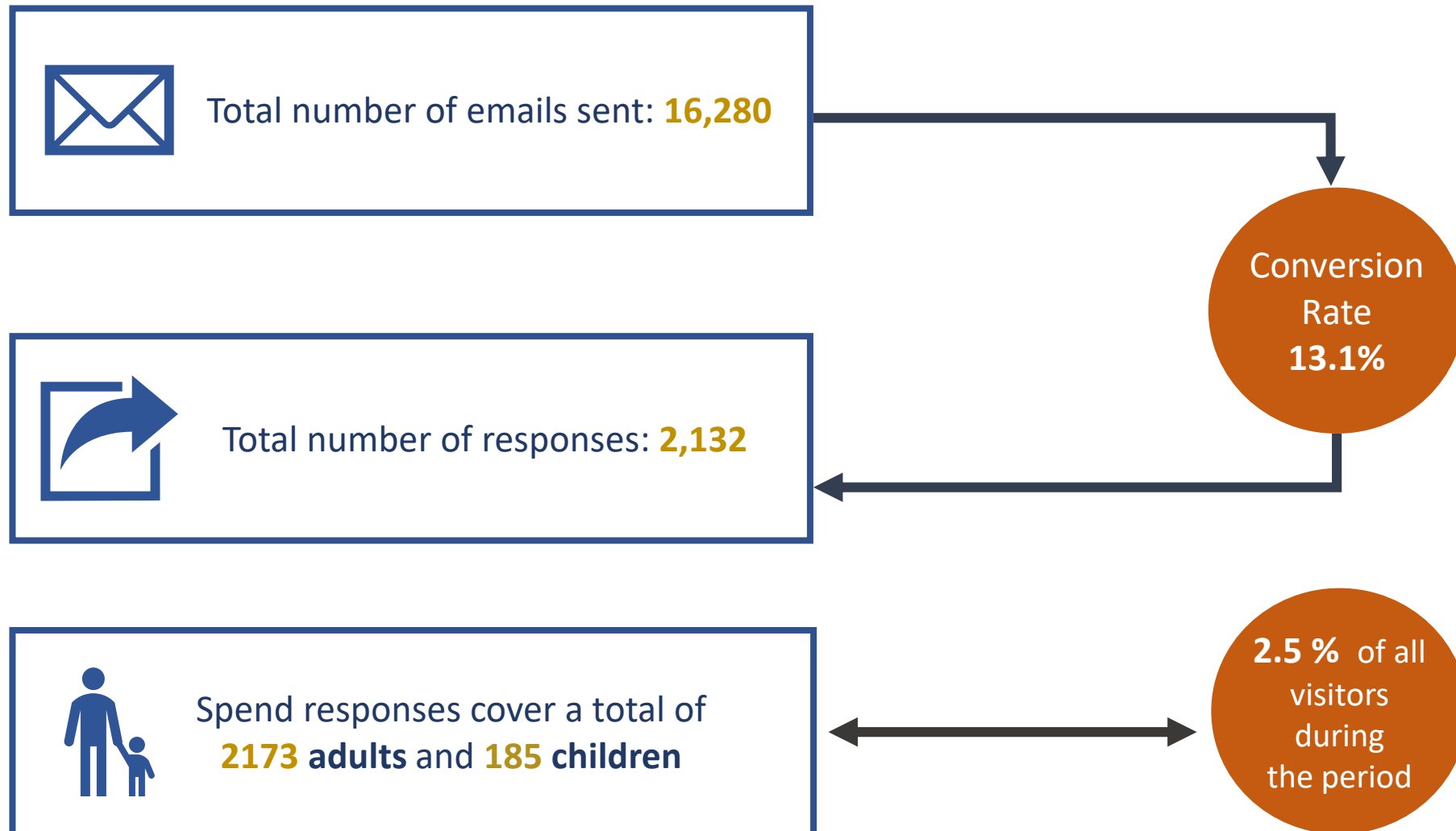
54% Australia
12% Asia
10% North America
9% New Zealand
7% Europe
7% Pacific
0.4% Other



Males

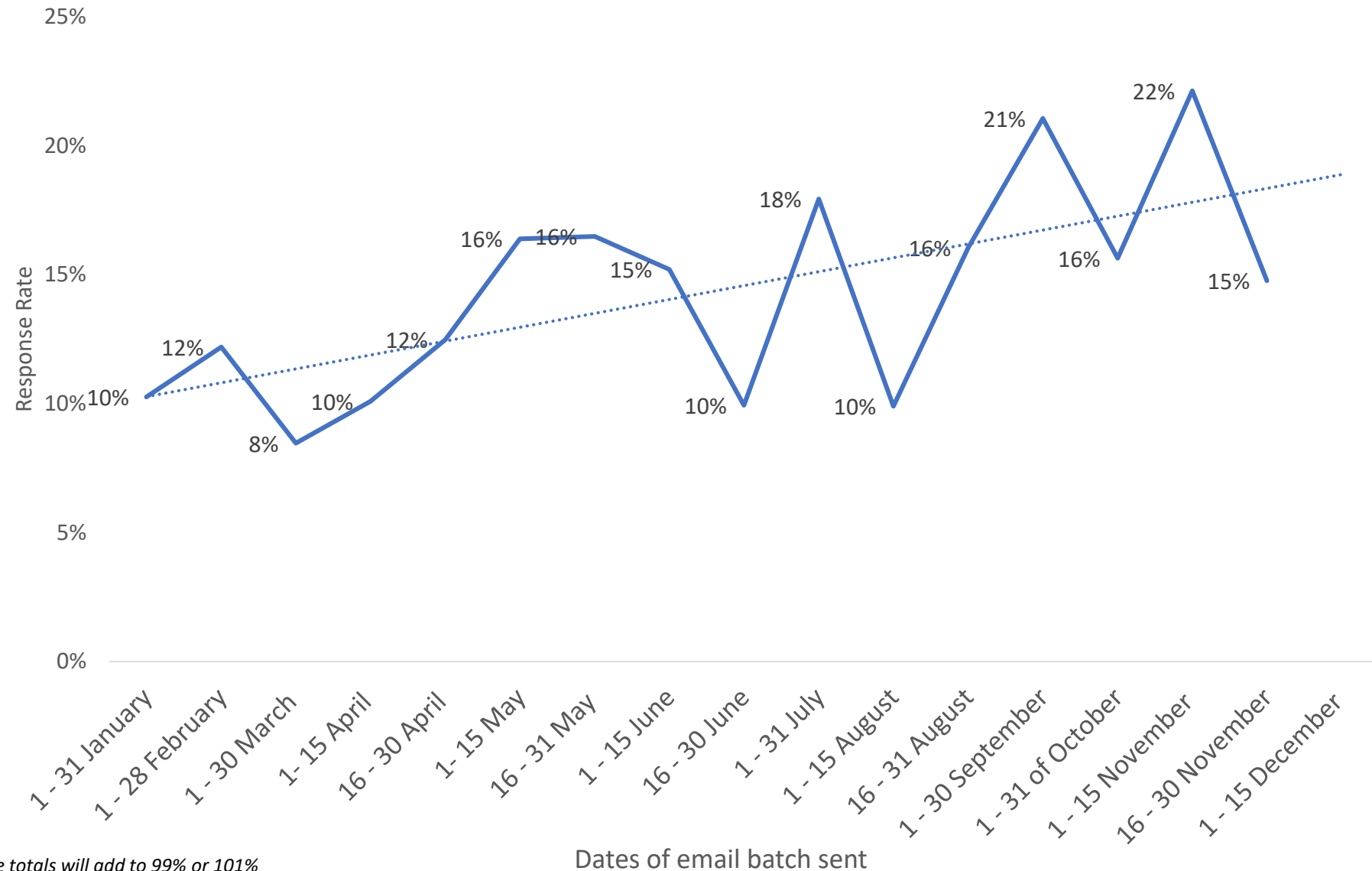
Respondents

10



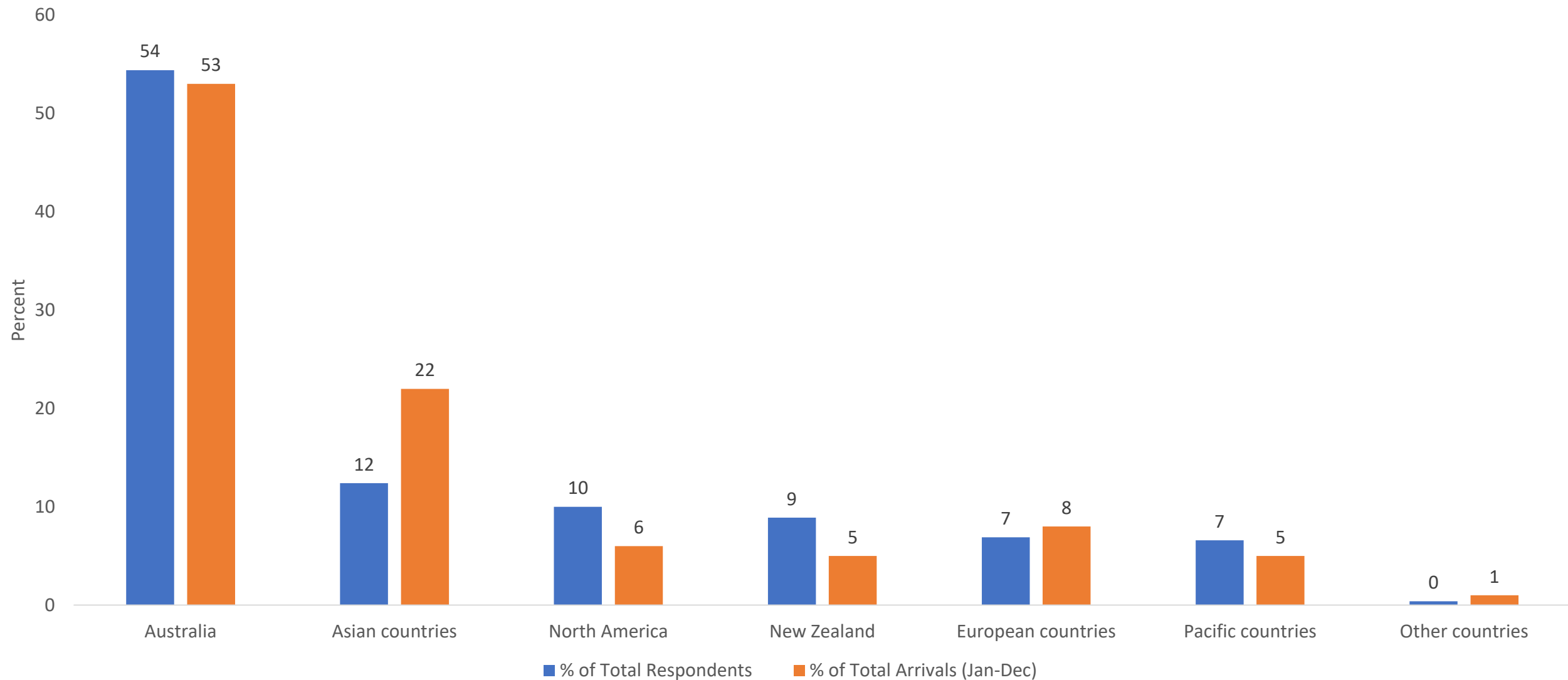
IVS Response Rate Data

11



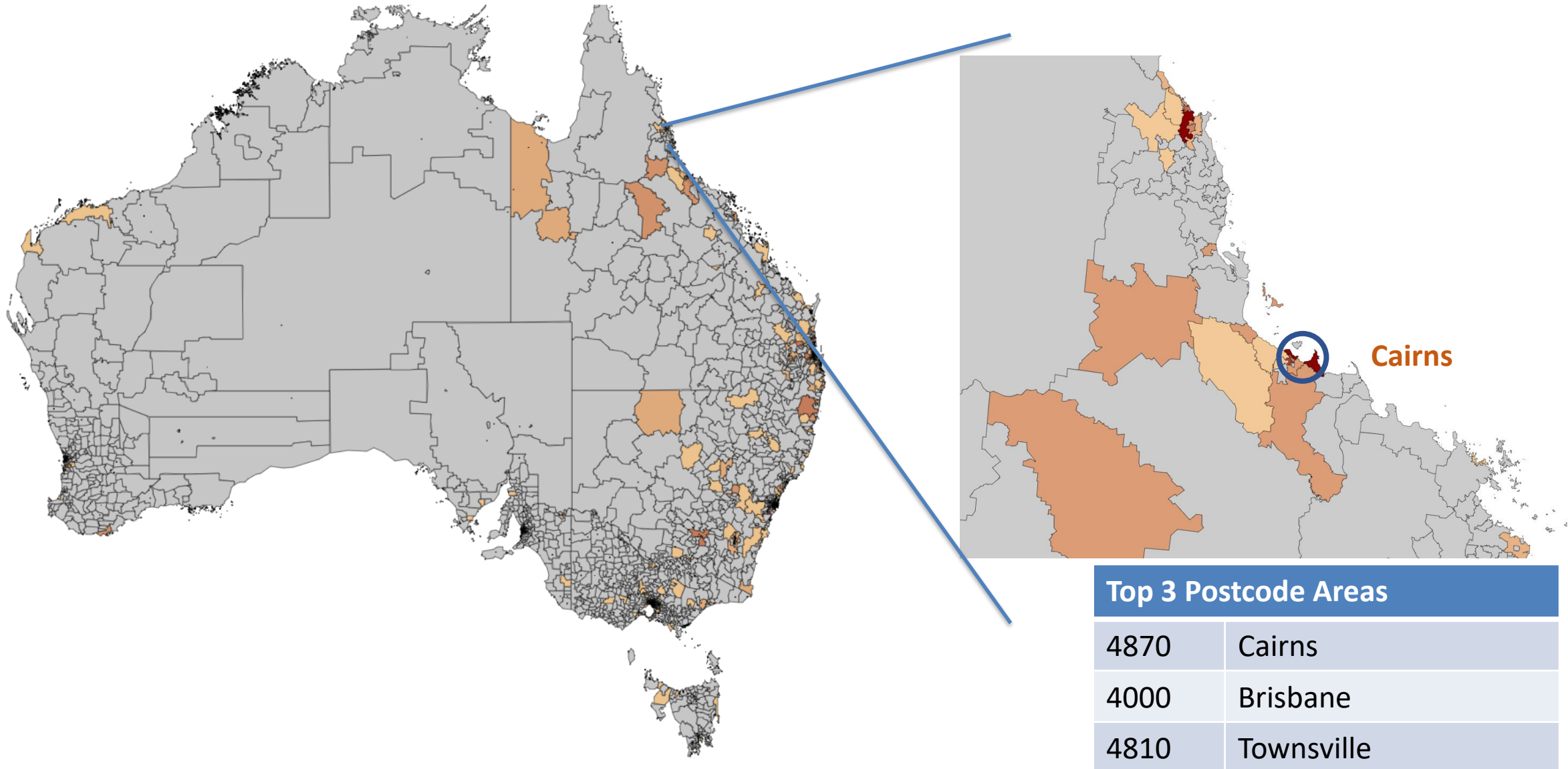
Country of Origin

12



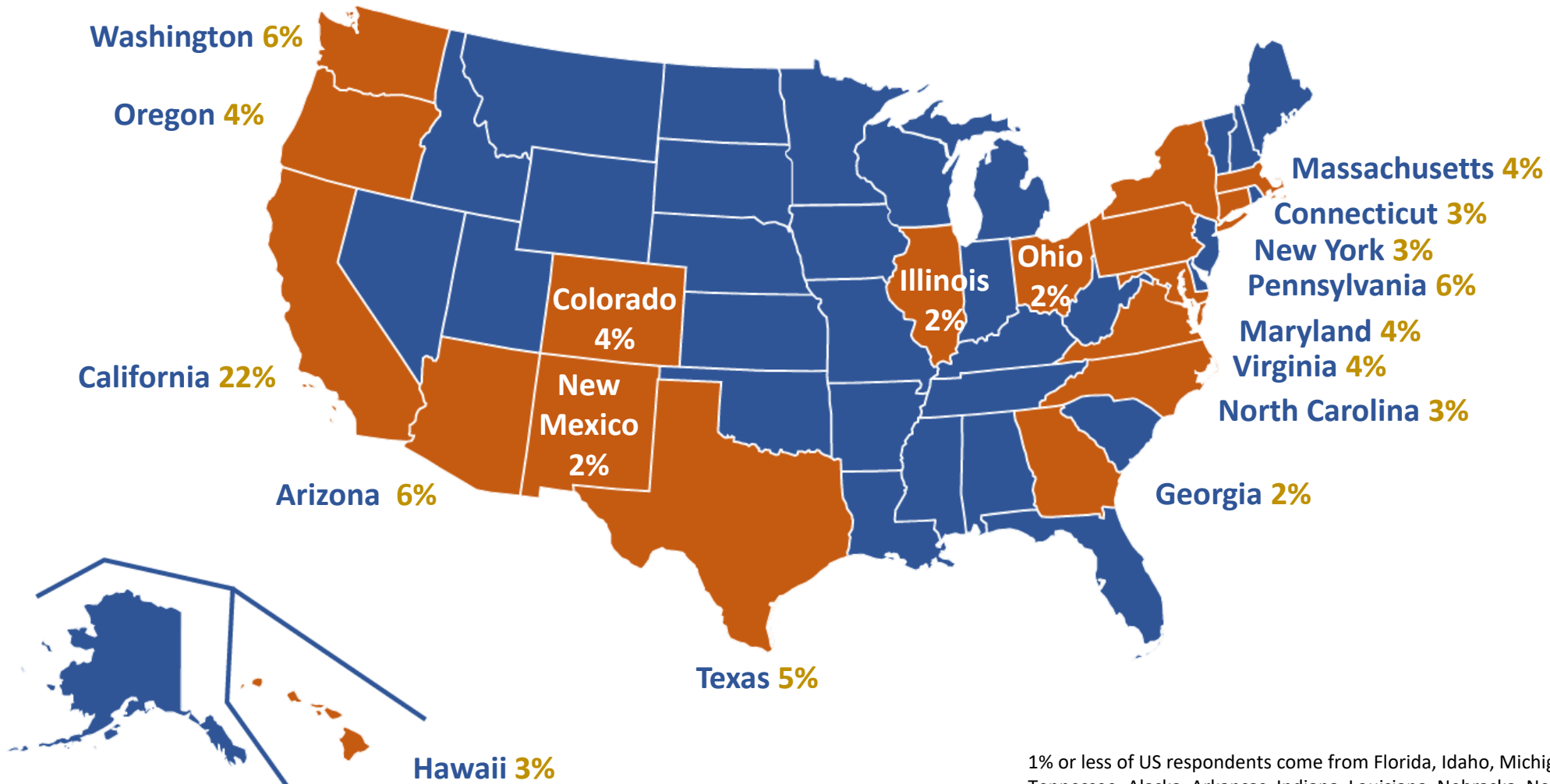
Australian Respondents – IVS Postcode Respondent Data

13



US Respondents – IVS Respondent Data

14



1% or less of US respondents come from Florida, Idaho, Michigan, Minnesota, Missouri, Tennessee, Alaska, Arkansas, Indiana, Louisiana, Nebraska, New Hampshire, New Jersey, South Carolina, Utah, Vermont, Wisconsin. Not shown on map.

Presentation Structure



Note: Data is weighted by visitor arrival data excluding cruise and employment visitors

Visitor Characteristics – Summary

16



Airlines Used

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



Travel Companions

- 47% Solo
- 23% One companion



Length of Stay

- 10.3 Nights on average
- 55% Stayed 7 days or more



Purpose of Visit

- 37% Business
- 26% Holiday
- 19% Visiting Friends/Family



Previous Visits

- 42% First trip
- 20% 1 or 2 times
- 10% 3 or 4 times
- 28% 5+ times



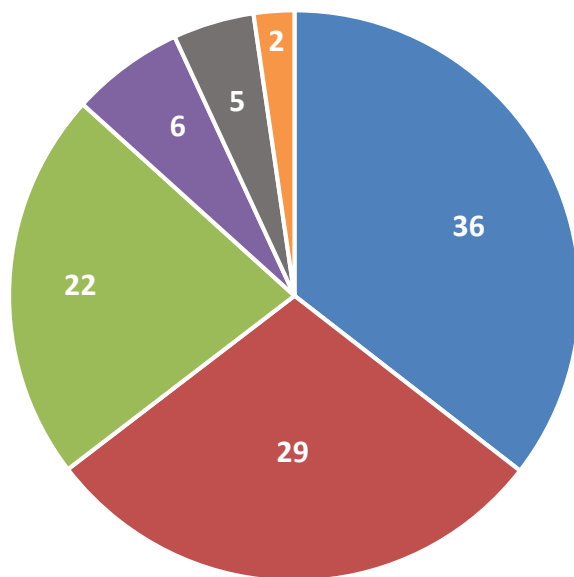
Regions Visited on Trip

- 77% Papua Region
- 82% National Capital District
- 20% Islands Region
- 20% Momase Region
- 16% Highlands Region

Main Purpose of Visit – Australia and New Zealand

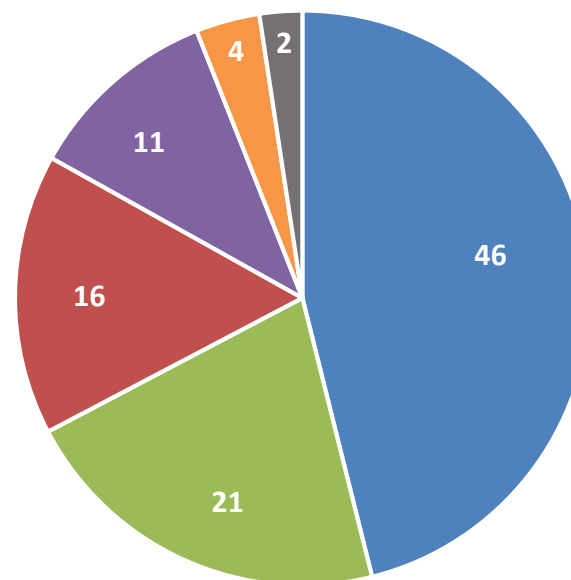
17

Australia



■ Business ■ Holiday ■ VFR ■ Volunteering ■ Other ■ Education

New Zealand

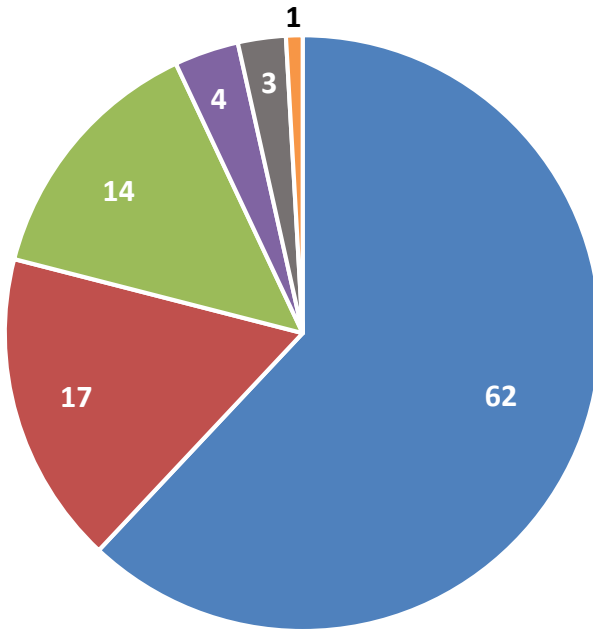


■ Business ■ VFR ■ Holiday ■ Volunteering ■ Education ■ Other

Main Purpose of Visit – Asia and Pacific

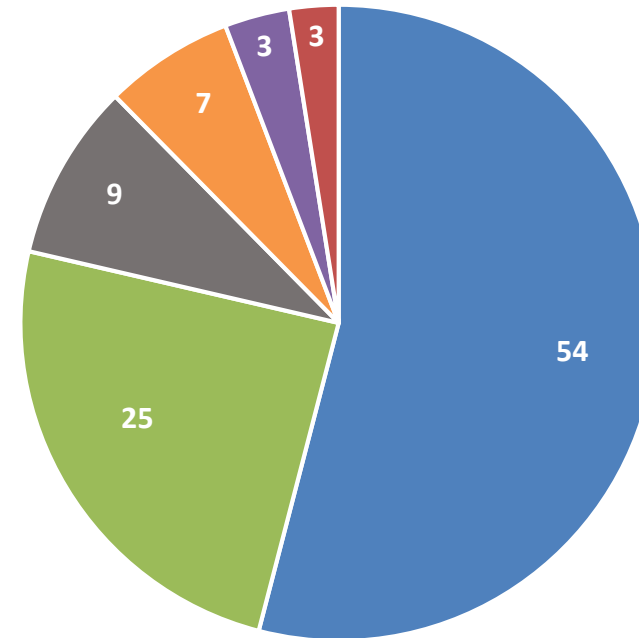
18

Asia



■ Business ■ Holiday ■ VFR ■ Volunteering ■ Other ■ Education

Pacific

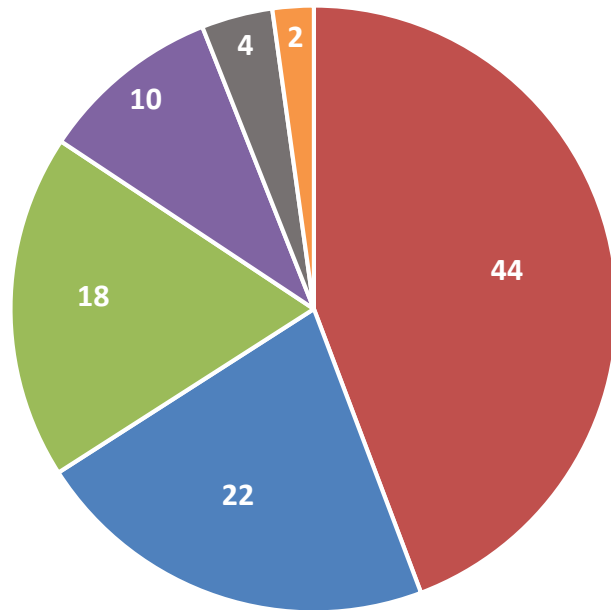


■ Business ■ VFR ■ Other ■ Education ■ Volunteering ■ Holiday

Main Purpose of Visit – North America and Europe

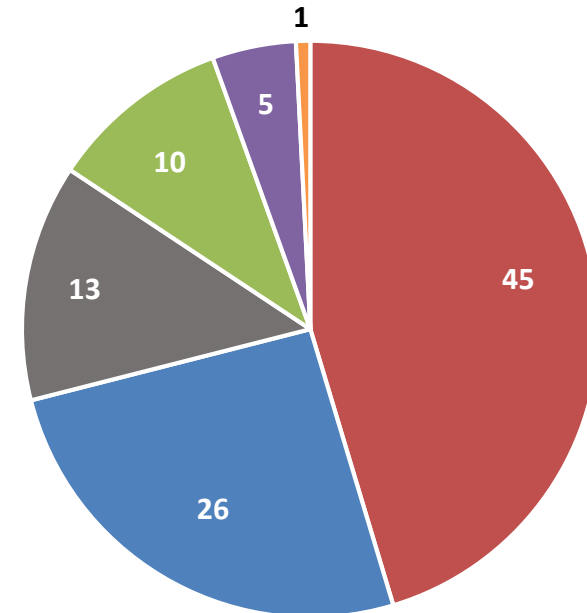
19

North America



■ Holiday ■ Business ■ VFR ■ Volunteering ■ Other ■ Education

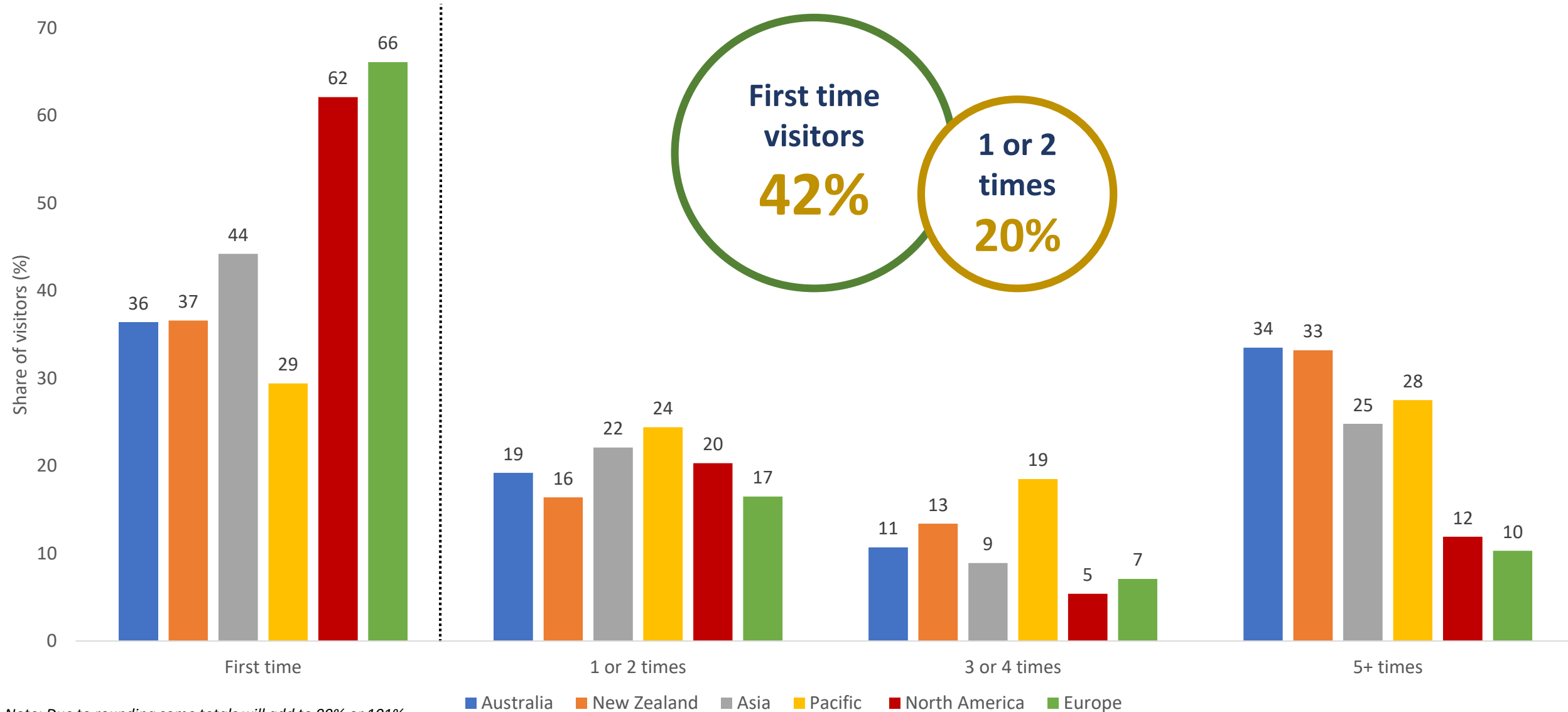
Europe



■ Holiday ■ Business ■ Other ■ VFR ■ Volunteering ■ Education

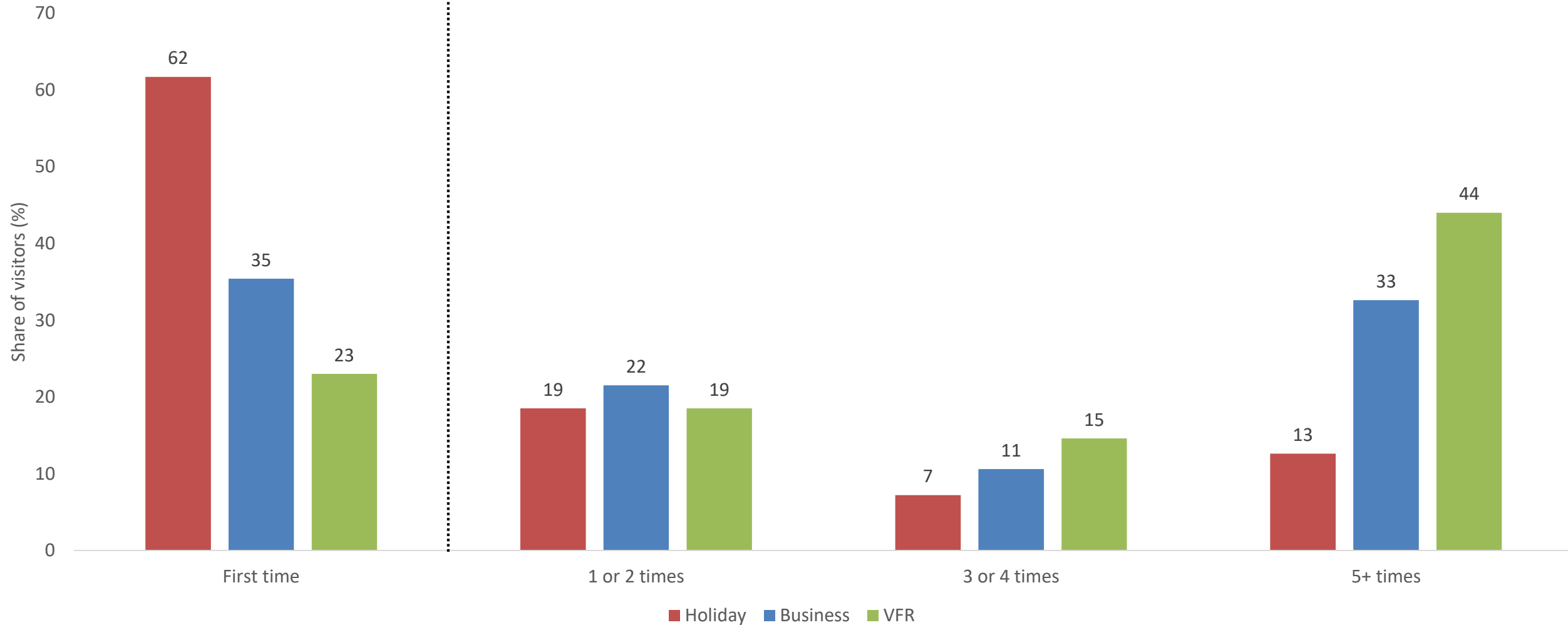
Previous visits – Country/Region Market

20



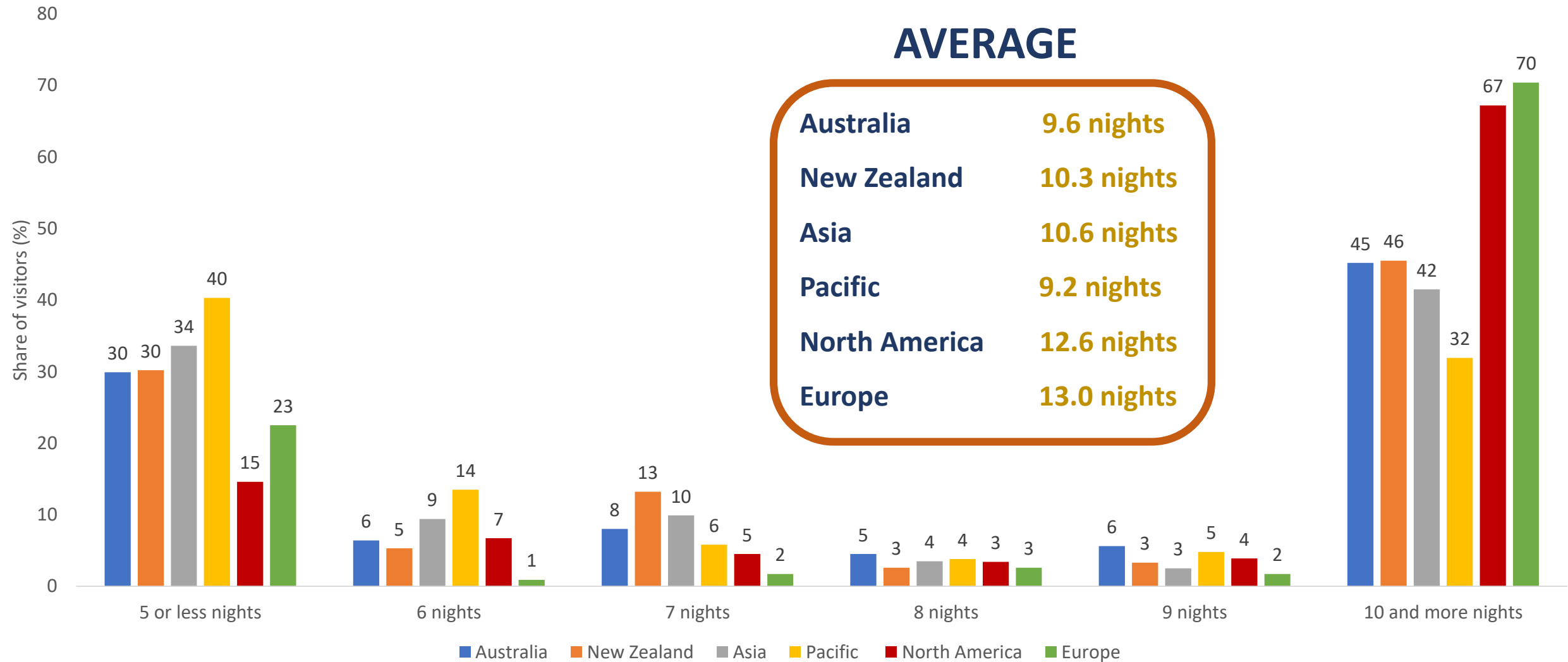
Previous Visits – Purpose of Visit

21



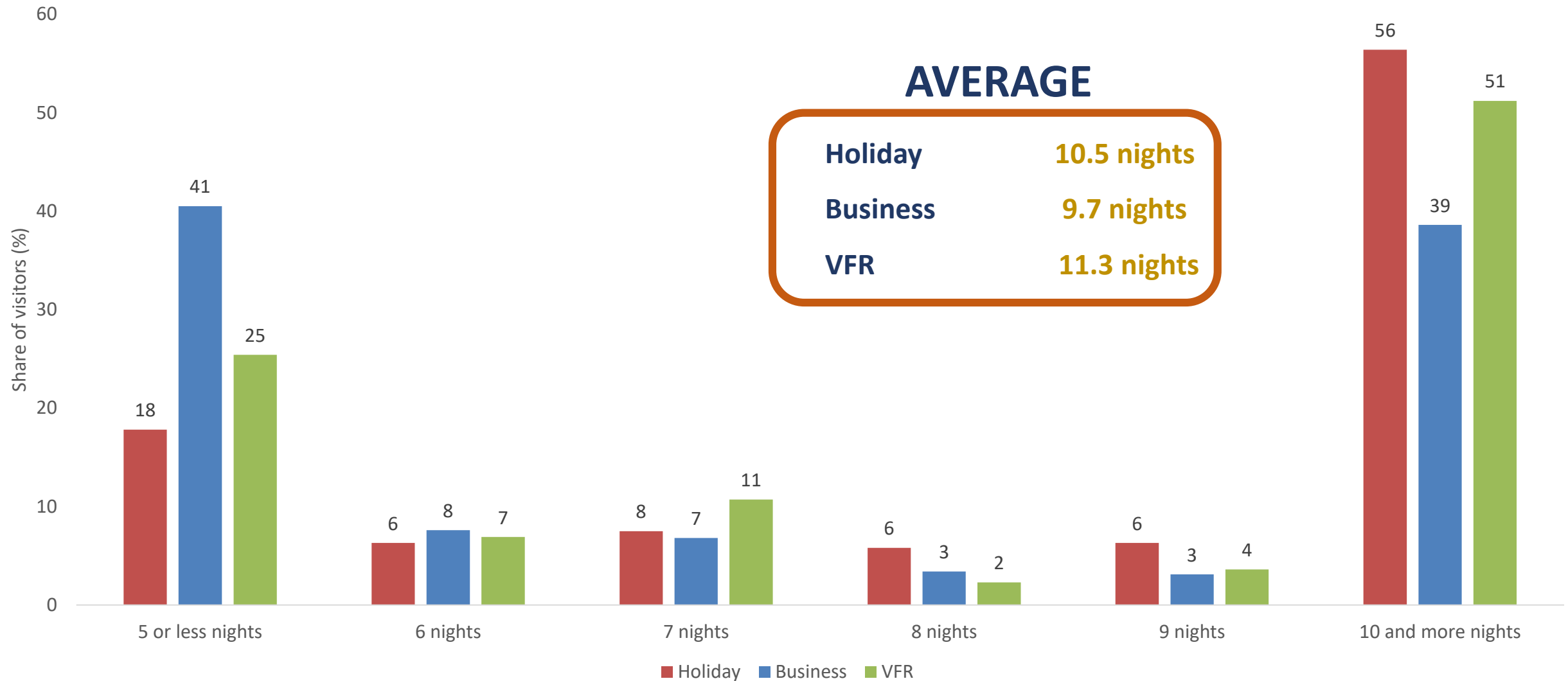
Note: Due to rounding some totals will add to 99% or 101%

Average Length of Stay – Country/Region Market



Note: 31 nights or more were removed from analysis

Average Length of Stay – Purpose of Visit



Note: 31 nights or more were removed from analysis

Note: Due to rounding some totals will add to 99% or 101%

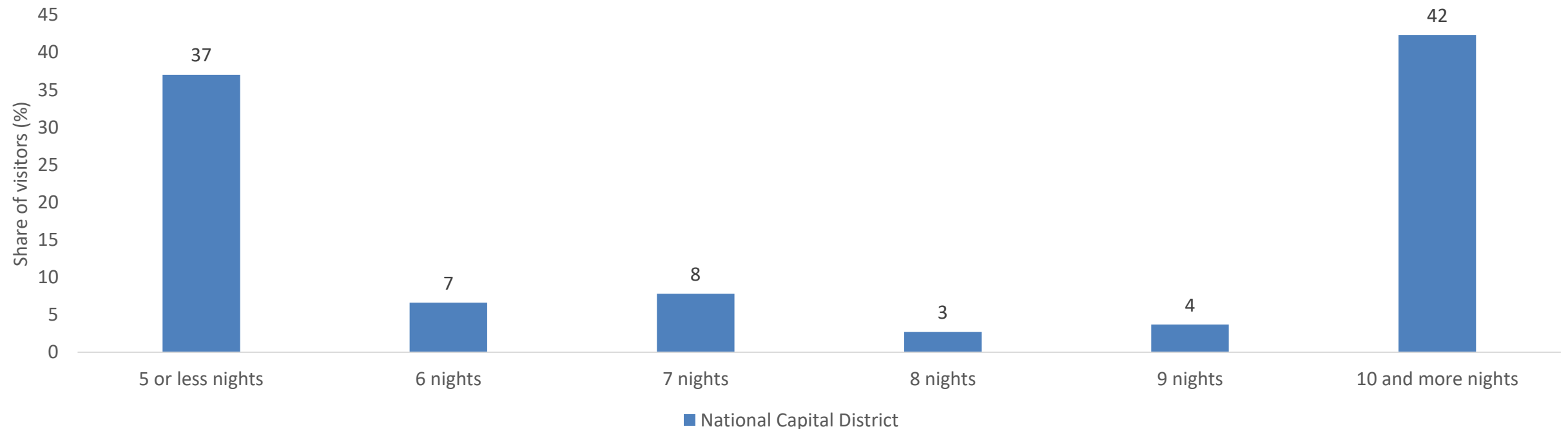
Average Length of Stay (ALoS) – NCD Visitors in PNG and Province Visited

NCD Visitors ALoS in PNG

National Capital District **9.5 nights**

NCD Visitors ALoS in NCD

National Capital District **6.9 nights**



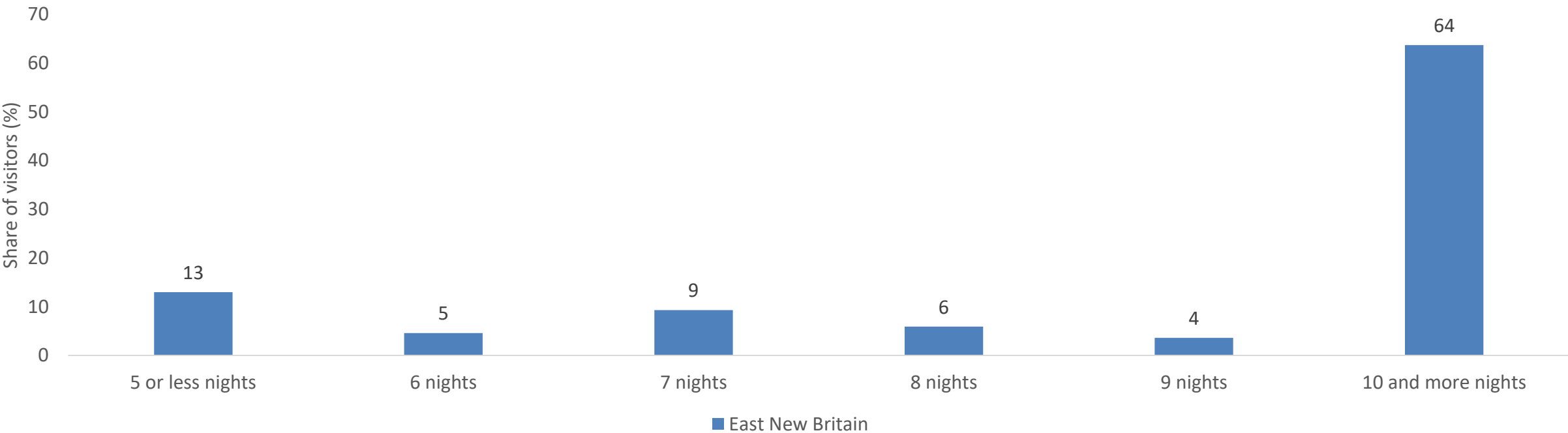
Average Length of Stay (ALoS) – ENB Visitors in PNG and Province Visited

ENB Visitors ALoS* in PNG

East New Britain 12.3 nights

ENB Visitors ALoS* in ENB

East New Britain 6.4 nights



ALoS: Average Length of Stay

Note: Due to rounding some totals will add to 99% or 101%

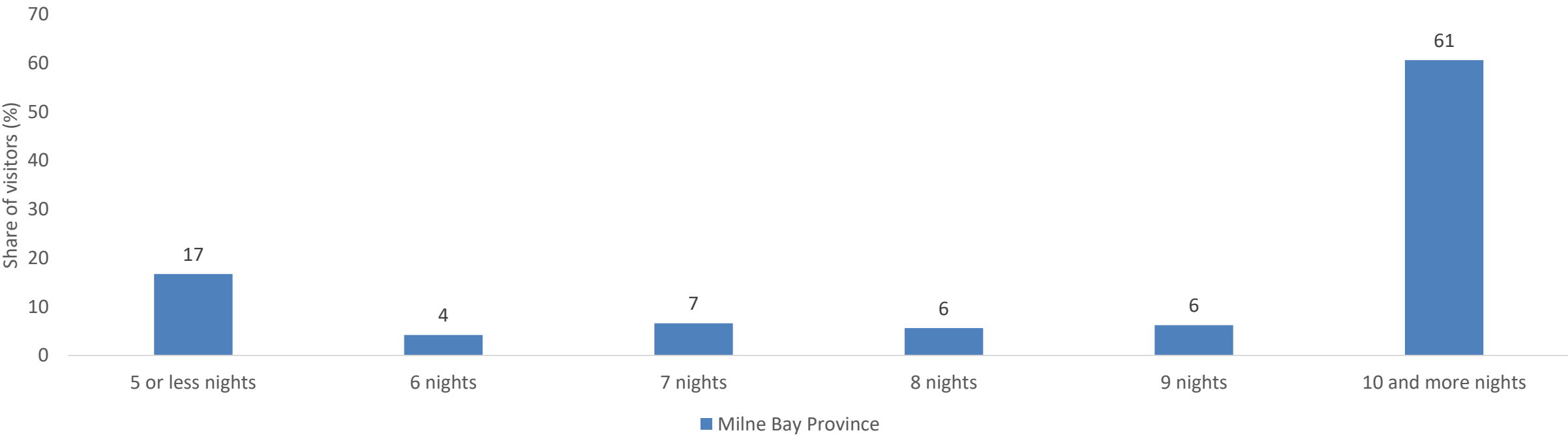
Average Length of Stay (ALoS) – MB Visitors in PNG and Province Visited

MB Visitors ALoS in PNG

Milne Bay Province 12.3 nights

MB Visitors ALoS in MB

Milne Bay Province 8.5 nights



ALoS: Average Length of Stay

Note: Due to rounding some totals will add to 99% or 101%

Airlines Used for Travel – Country/Region Market

27



**64% Total
Visitors**

57% Australia
30% New Zealand
77% Asia
92% Pacific
69% North America
81% Europe



**28% Total
Visitors**

42% Australia
38% New Zealand
5% Asia
6% Pacific
31% North America
7% Europe



**13% Total
Visitors**

15% Australia
47% New Zealand
4% Asia
3% Pacific
10% North America
8% Europe



Philippine Airlines
**6% Total
Visitors**

0% Australia
0% New Zealand
18% Asia
2% Pacific
12% North America
12% Europe

Airlines PNG

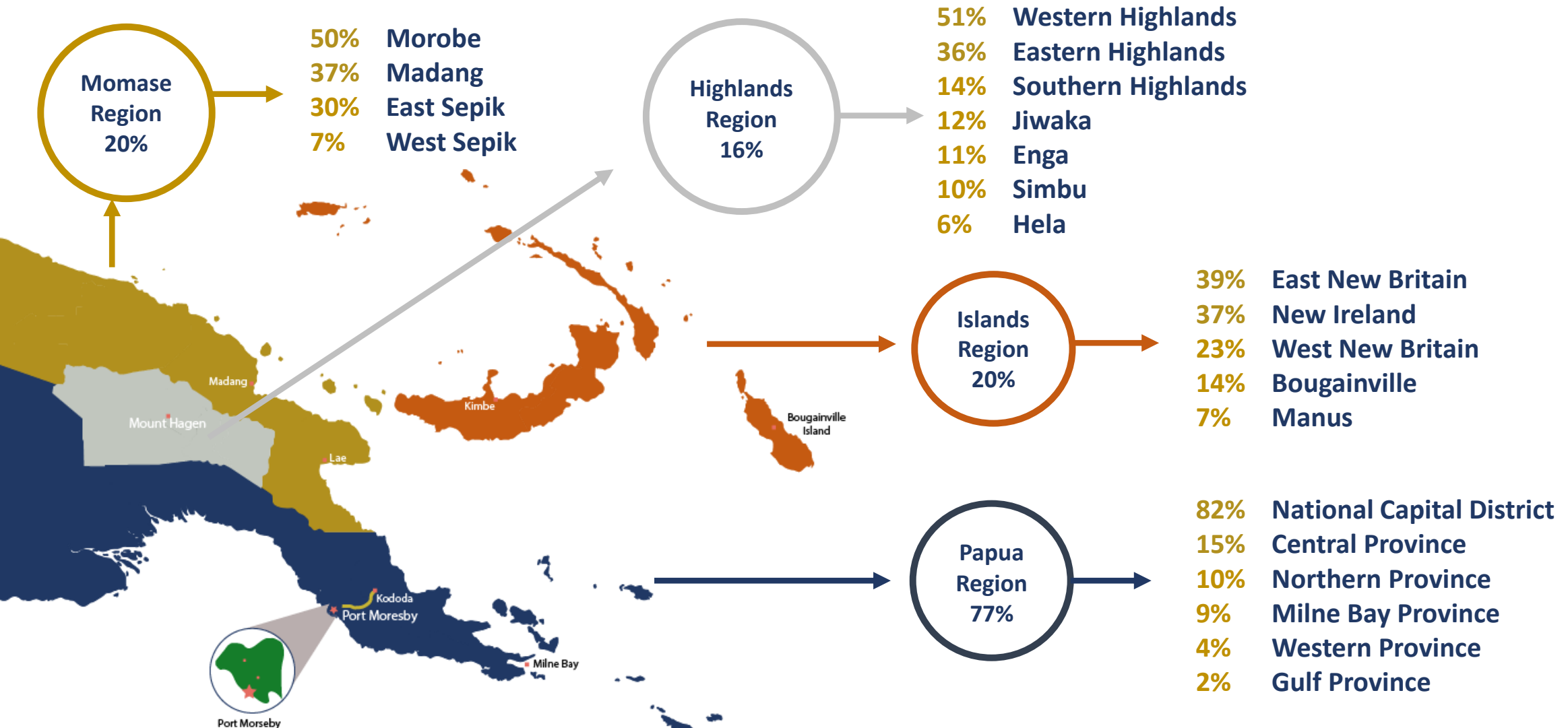
**2% Total
Visitors**

2% Australia
3% New Zealand
1% Asia
1% Pacific
5% North America
4% Europe

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

Regions Visited – All Visitors

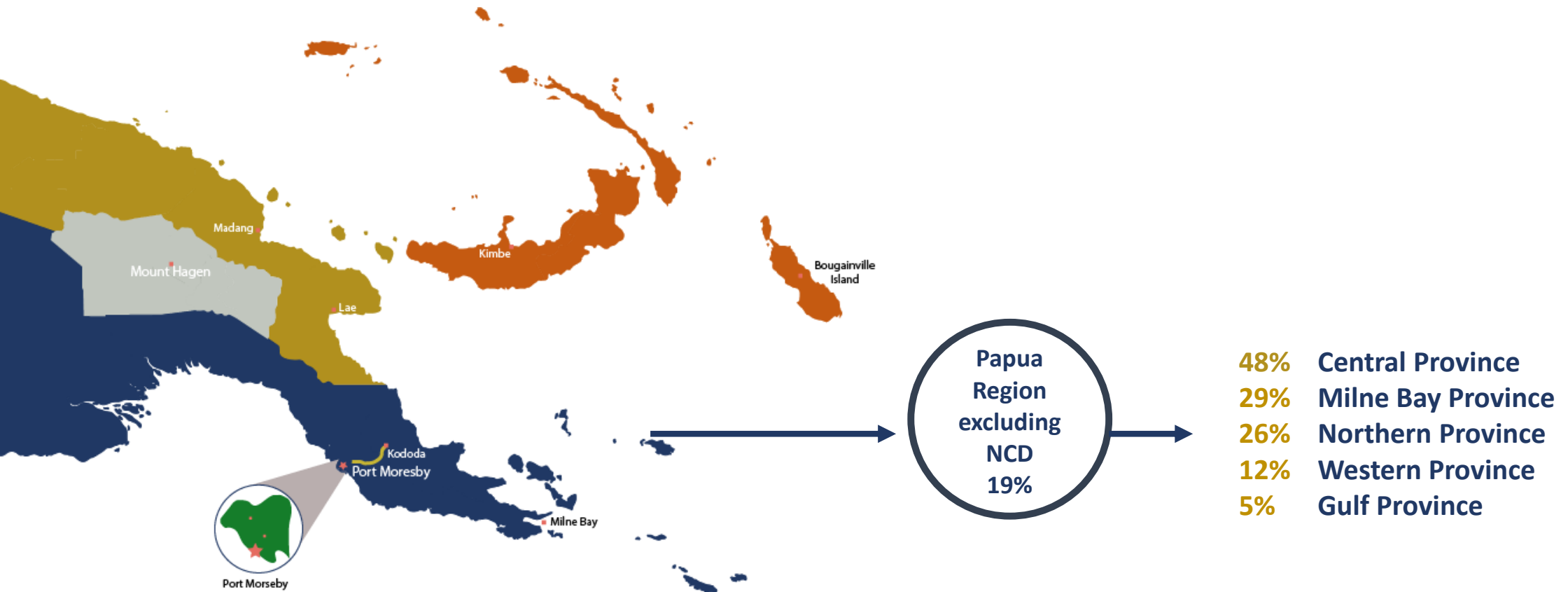
28



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

Regions Visited – Papua Region excluding the NCD

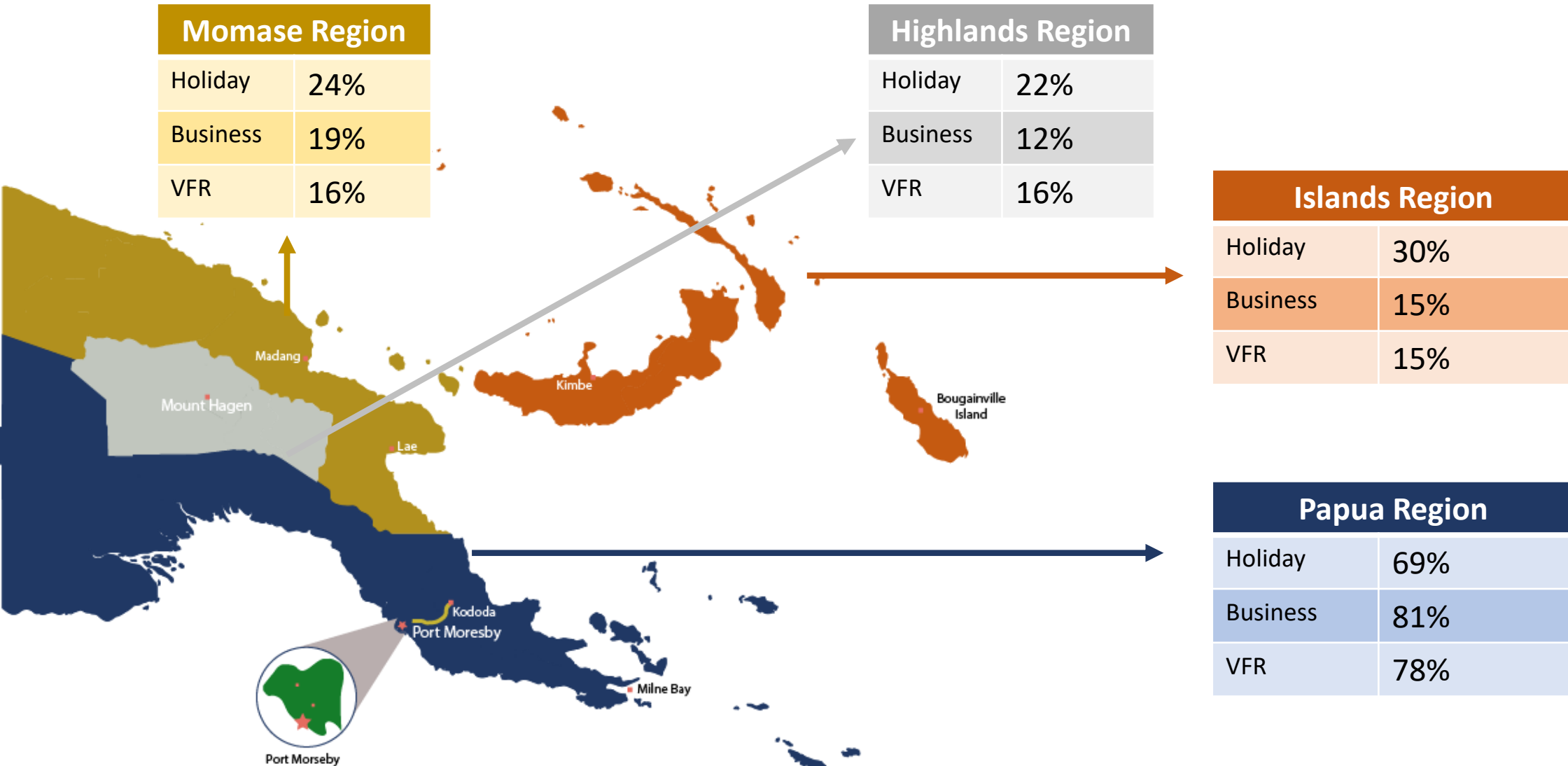
29



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

Percentage of All Visitors to Each Region by Purpose of Visit

30



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

Percentage of All Visitors by Purpose of Visit to Papua Region* and NCD

31

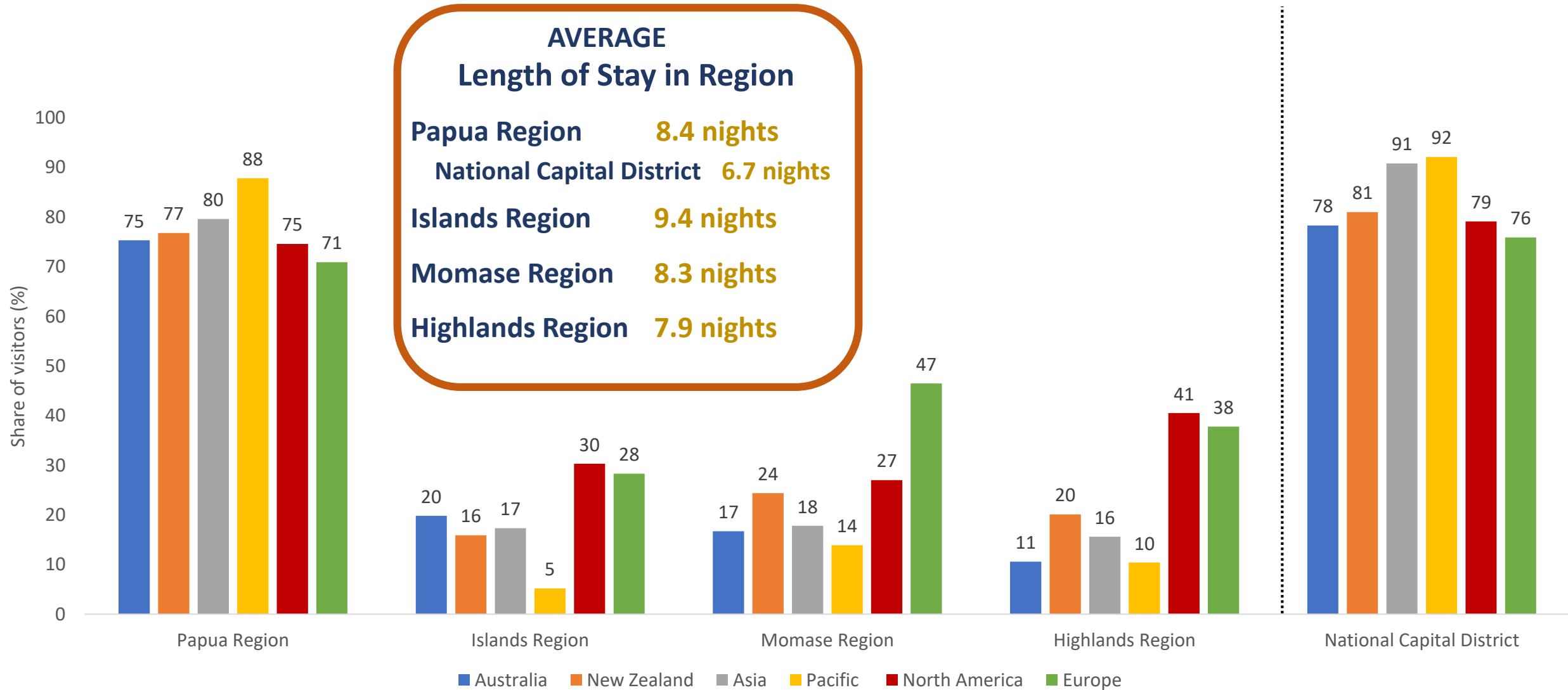


Note: Multiple responses, therefore totals do not add up to 100%

*: Papua Region visitors excludes visitors from the NCD

Regions Visited – Country

32



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

Detailed Information on NCD Visitors

33

National Capital District Visitors: 54,555 Total Visitors*



Length of stay in PNG **9.5 nights**



Purpose of Visit

43% Business
20% Visiting Friends/Family
19% Holiday



Country of Origin

52% Australia
14% Asia
10% North America
9% New Zealand
8% Pacific
6% Europe
1% Other

Detailed Information on MB Visitors

34

Milne Bay Province Visitors: 5,962 Total Visitors*



Length of stay in PNG **12.3 nights**



Purpose of Visit

| | |
|------------|--------------------------------|
| 41% | Holiday |
| 20% | Visiting Friends/Family |
| 17% | Business |



Country of Origin

| | |
|------------|----------------------|
| 49% | Australia |
| 18% | North America |
| 11% | Europe |
| 10% | New Zealand |
| 8% | Asia |
| 4% | Pacific |
| 1% | Other |

Detailed Information ENB Visitors

35

East New Britain Visitors: 6,480 Total Visitors*



Length of stay in PNG **12.3 nights**



Purpose of Visit

46% Holiday
23% Business
18% Visiting Friends/Family



Country of Origin



49% Australia
15% North America
14% Europe
11% Asia
7% New Zealand
2% Other
1% Pacific

Presentation Structure



Visitor Expenditure – Per Person and Total

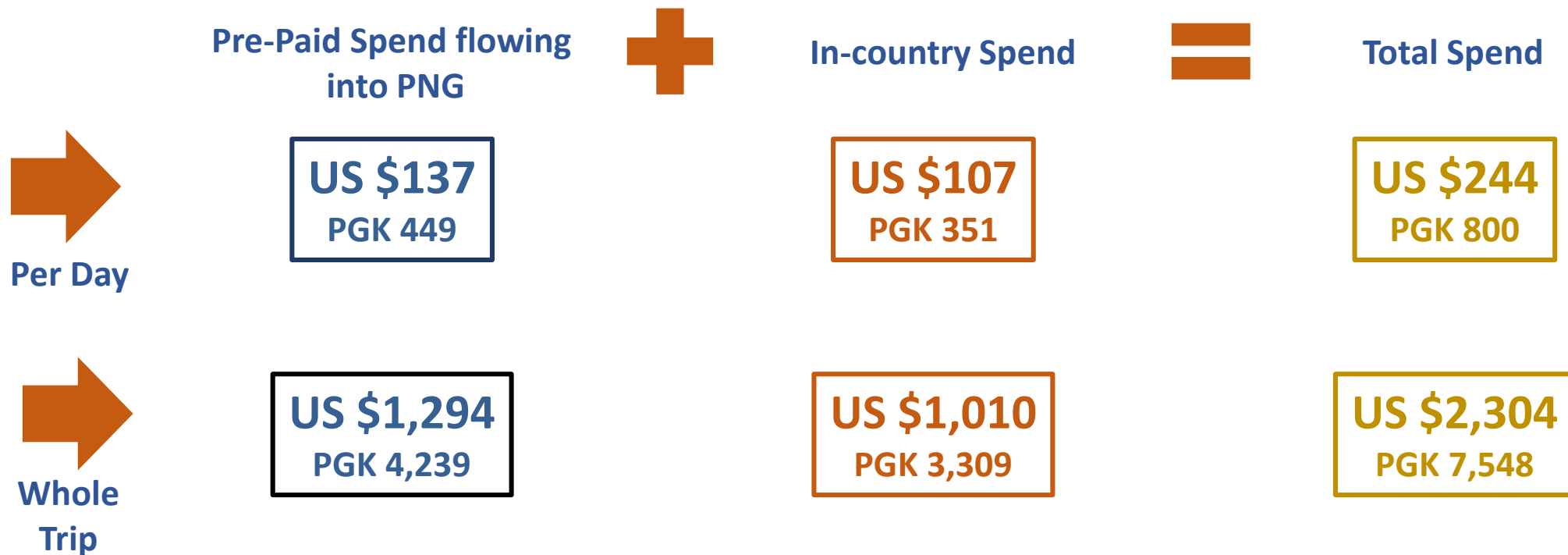
37

| | Pre-Paid Spend flowing into PNG | + | In-country Spend | = | Total Spend |
|----------------------------------------------------------------------------------------------------|--------------------------------------------|---|------------------------------------------|---|--------------------------------------------|
|  Per Day | <div>US \$138</div> <div>PGK 452</div> | | <div>US \$93</div> <div>PGK 305</div> | | <div>US \$231</div> <div>PGK 757</div> |
|  Whole Trip | <div>US \$1,417</div> <div>PGK 4,642</div> | | <div>US \$954</div> <div>PGK 3,125</div> | | <div>US \$2,371</div> <div>PGK 7,767</div> |

Direct economic impact on PNG for Jan - Dec 2017
US \$204.8 million / PGK 670.9 million in total

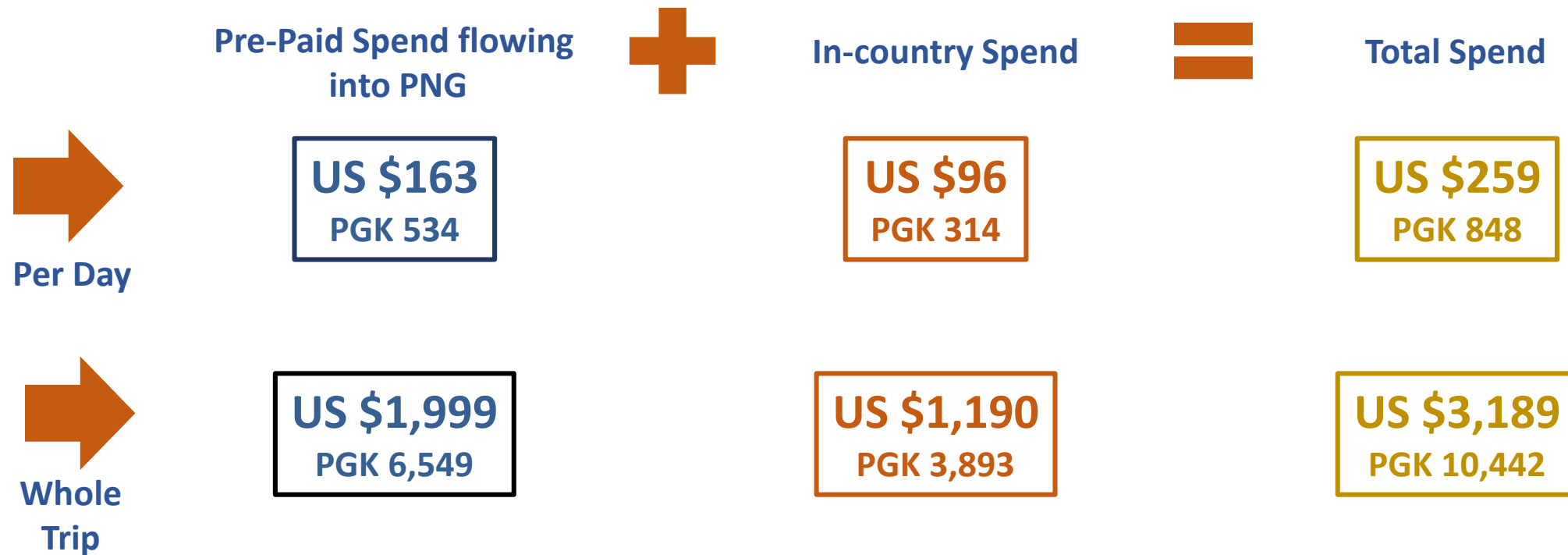
National Capital District Visitor Expenditure – Per Person and Total

38



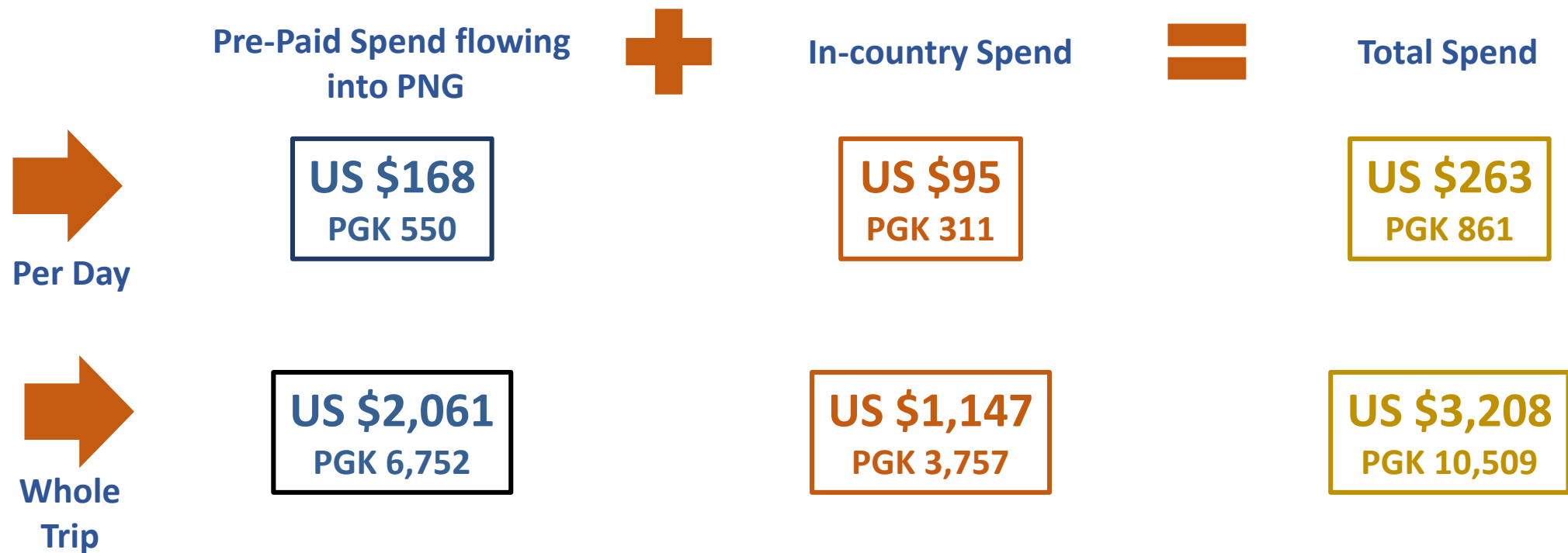
Milne Bay Province Visitor Expenditure – Per Person and Total

39



East New Britain Visitor Expenditure – Per Person and Total

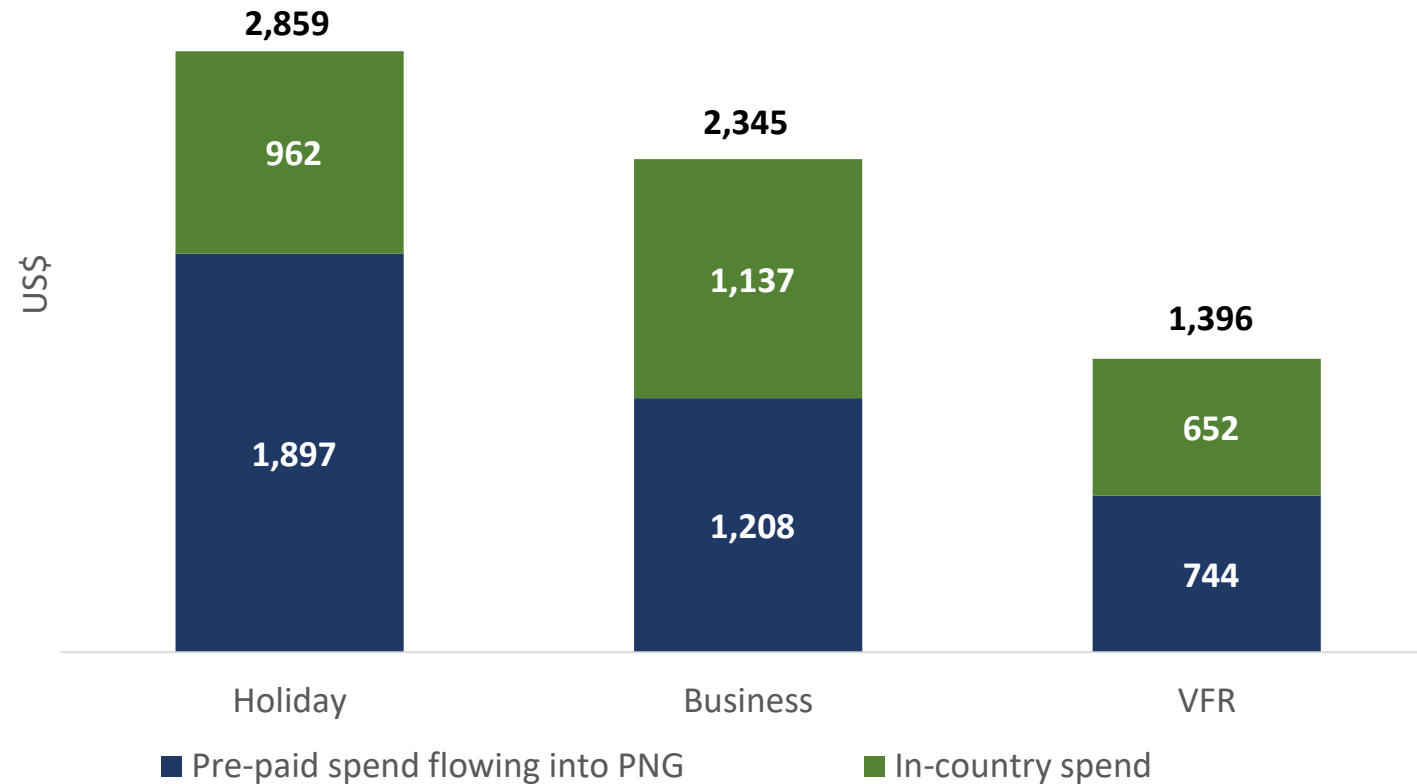
40



Expenditure by Purpose of Visit USD

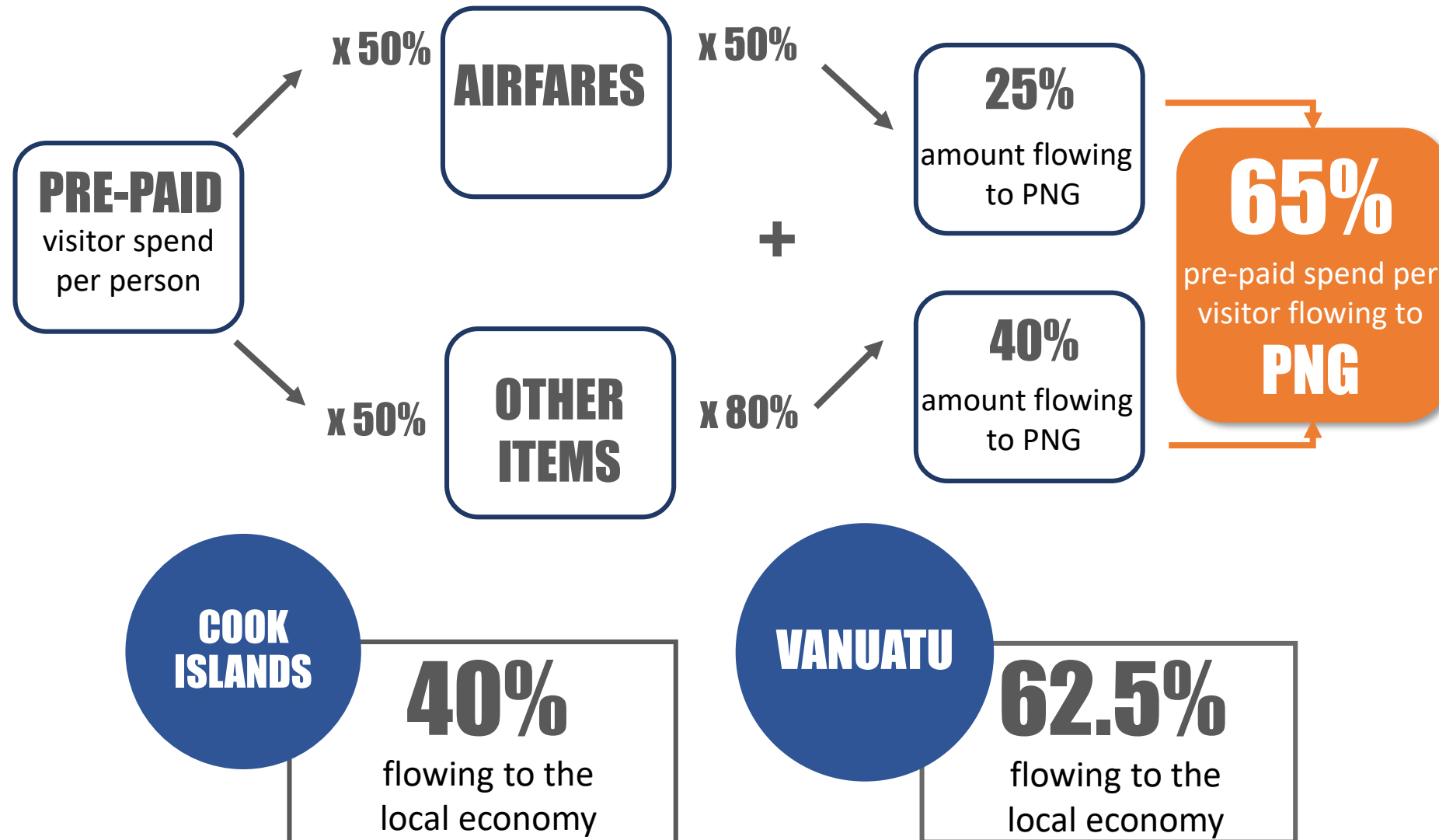
41

Per Person Per Visit



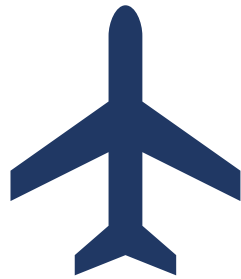
Prior to Arrival Visitor Expenditure

42



Breakdown of Pre-Paid Spend

43



50%



40%



5%

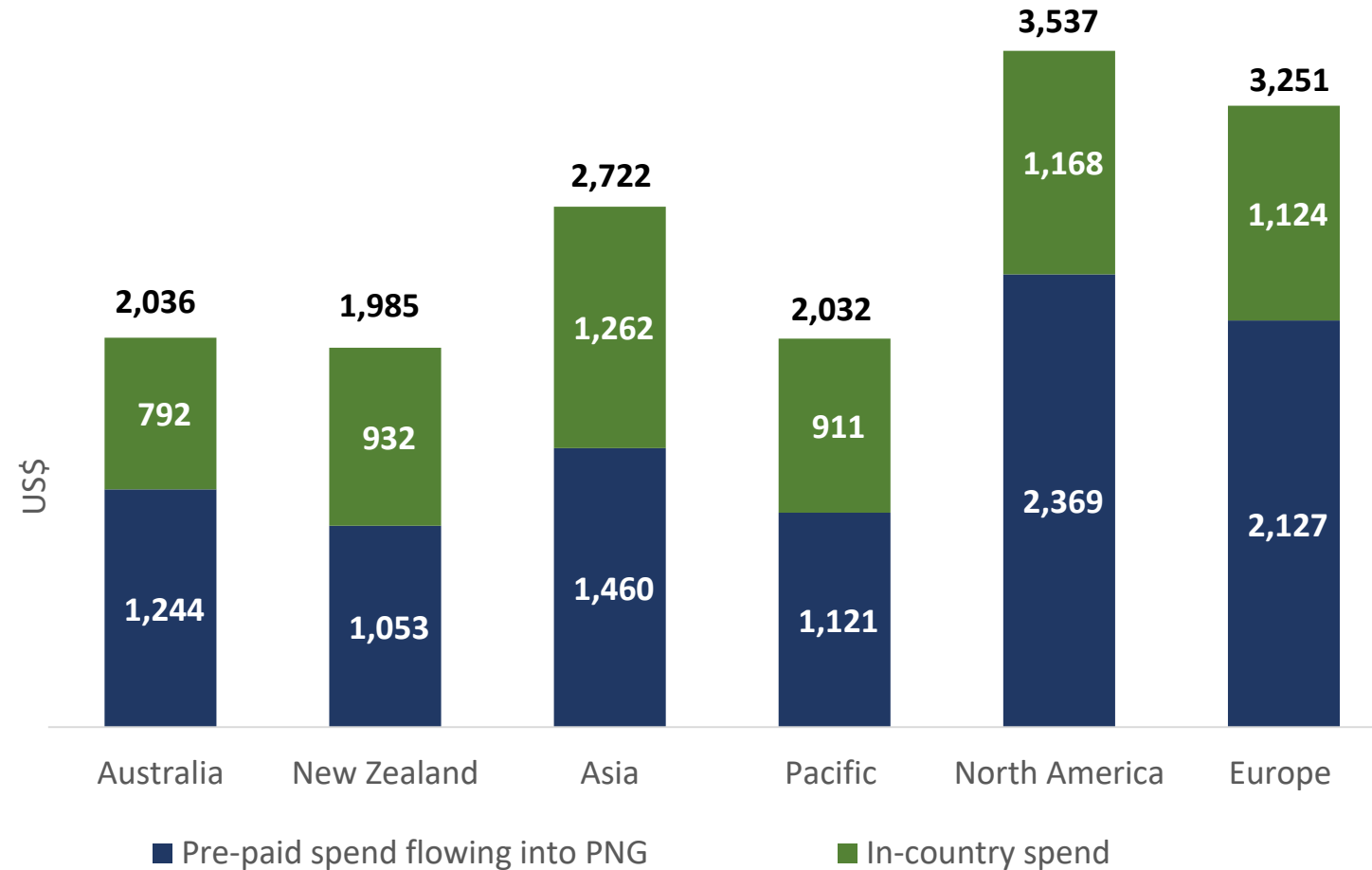


5%

Expenditure by Source Market USD

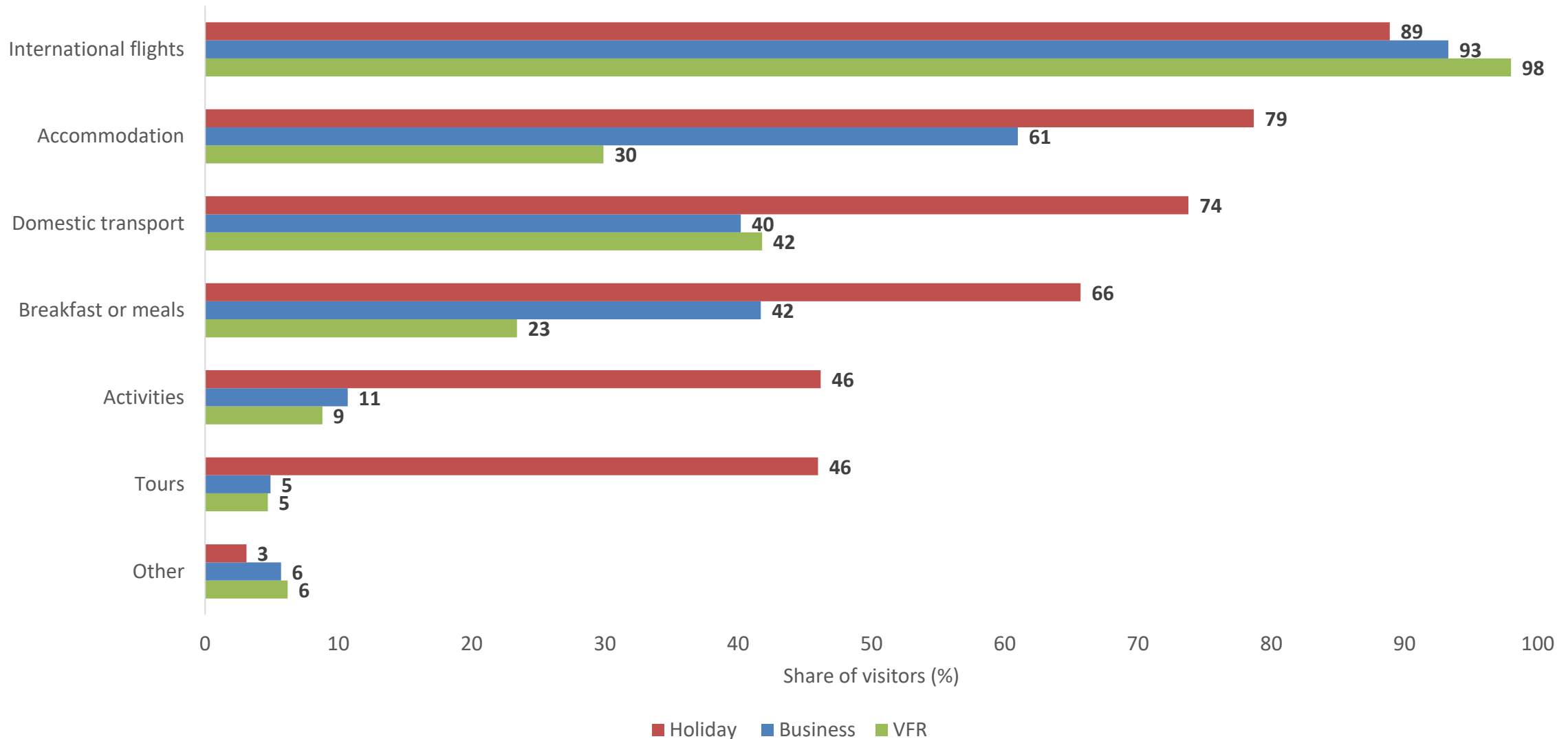
44

Average Spend Per Person Per Visit



Percentage of Visitors Spending on Areas Prior to Arrival – Purpose of Visit

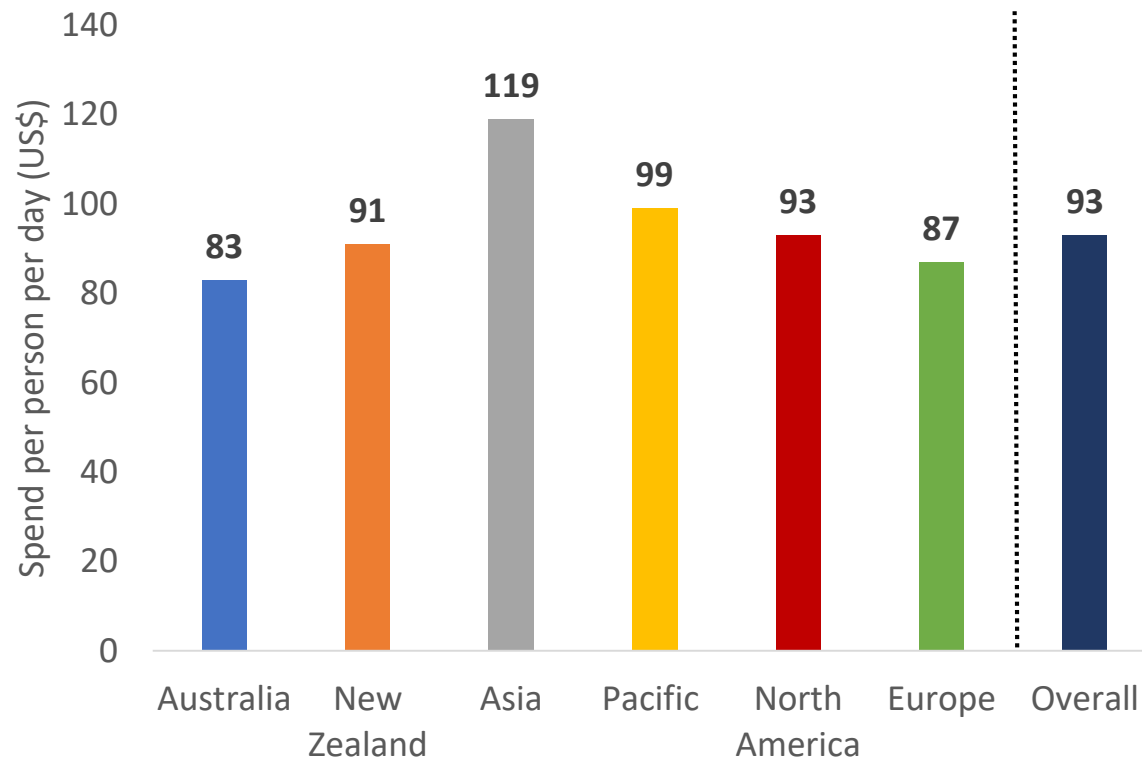
45



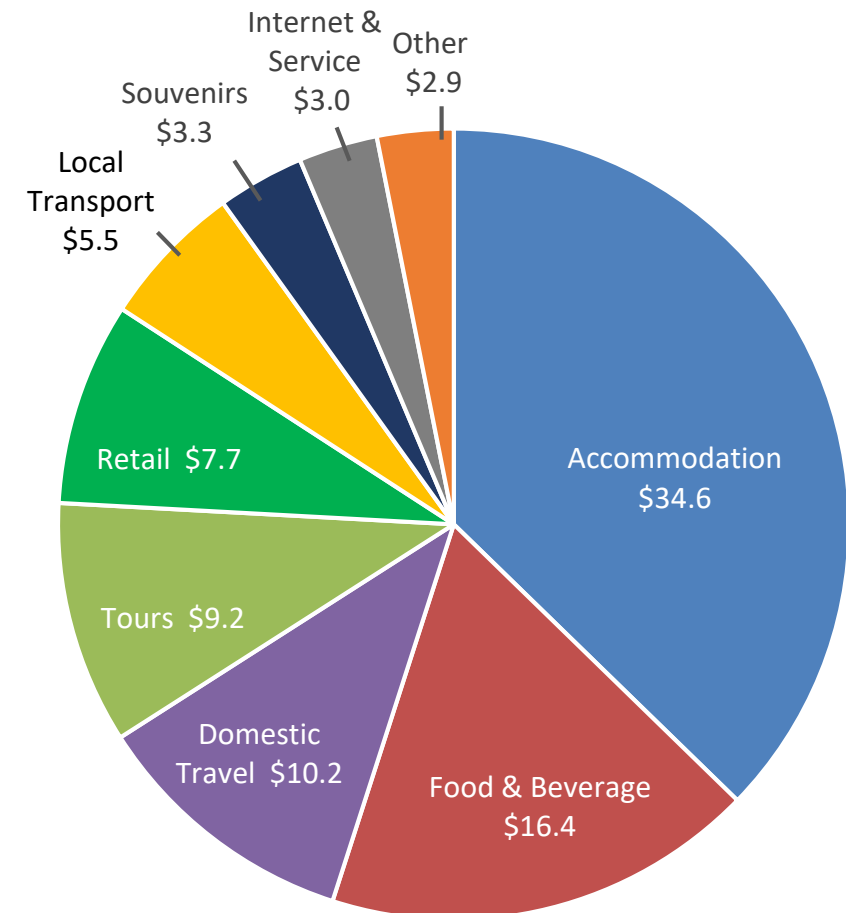
Note: Multiple responses, therefore totals does not add up to 100%

Average in Country Spend (USD) per person per day

By Market

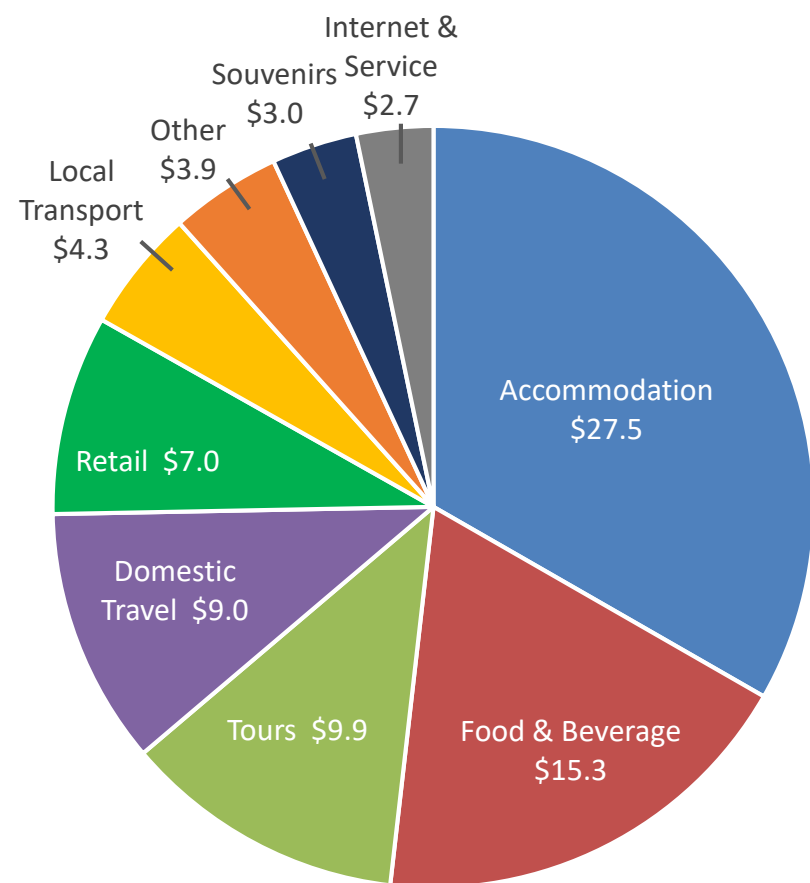


Overall – US \$93 per day

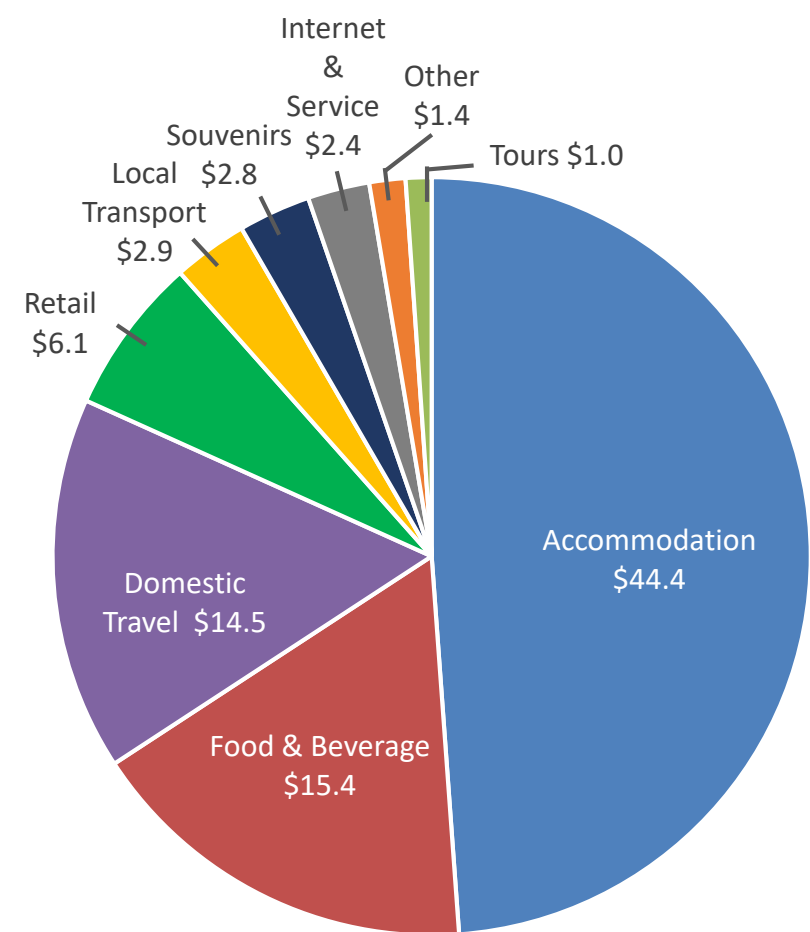


Average in Country Spend (USD) by Australia and New Zealand Visitors

Australia – US \$83 per day

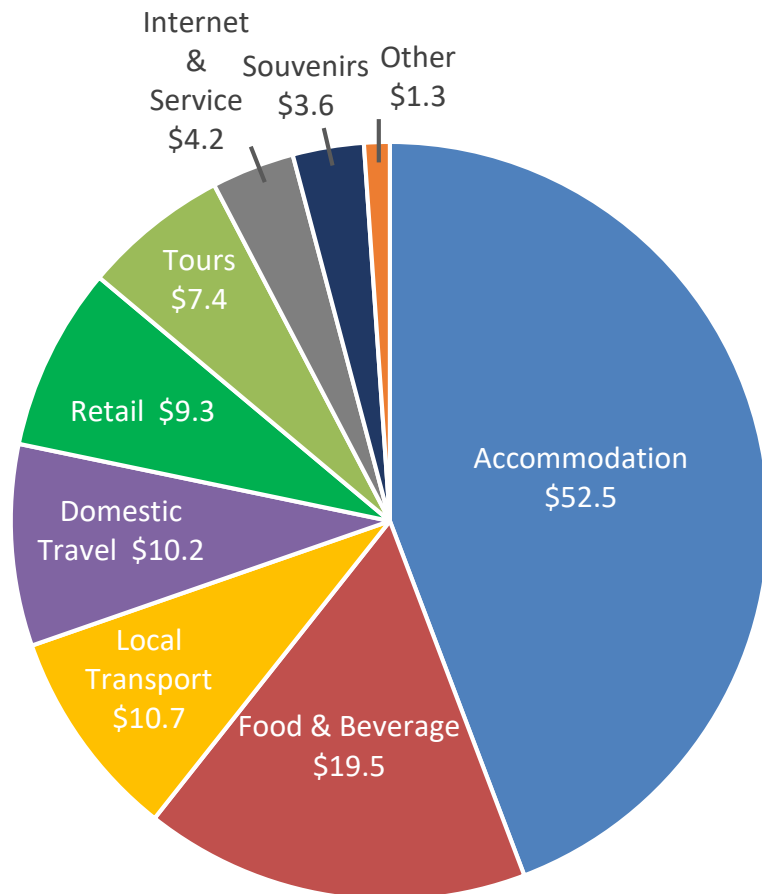


New Zealand – US \$91 per day

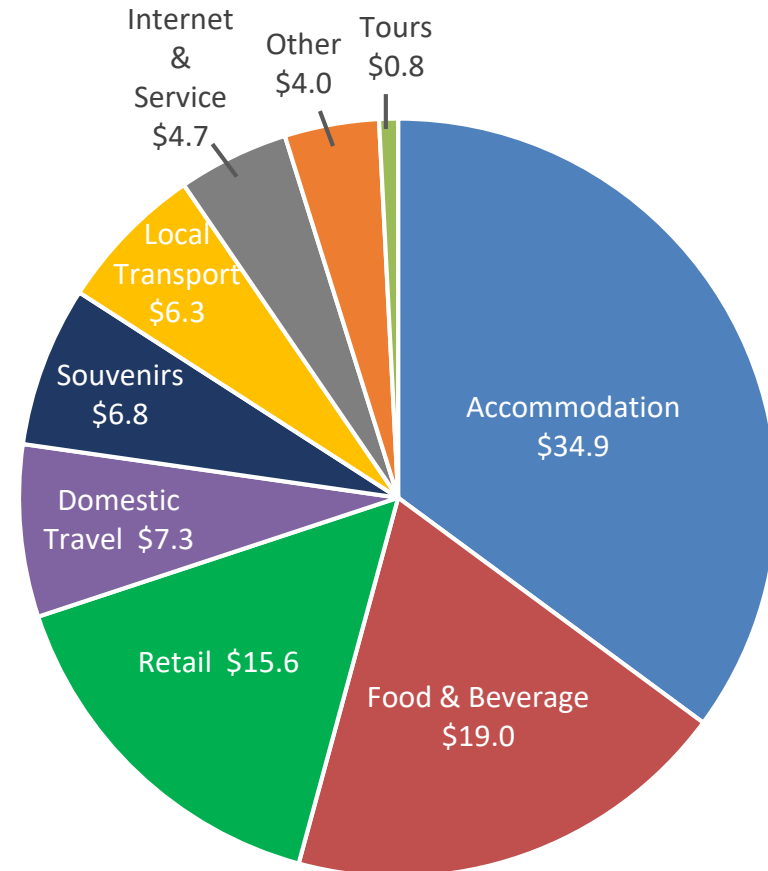


Average in Country Spend (USD) by Asia and Pacific Visitors

Asia – US \$119 per day

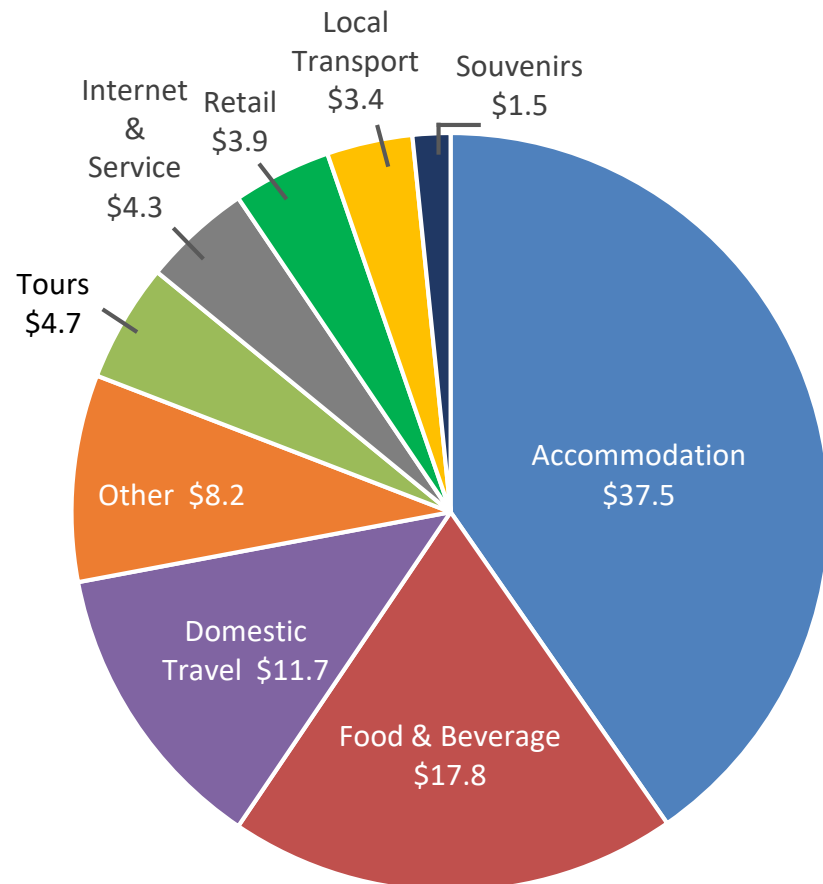


Pacific – US \$99 per day

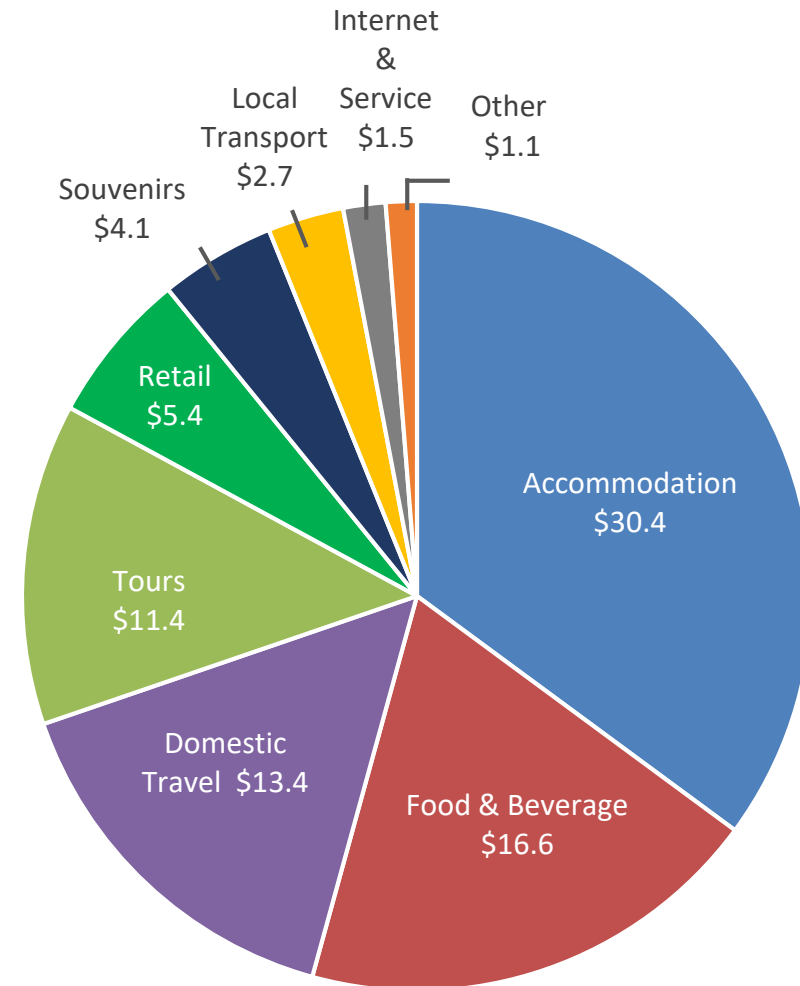


Average in Country Spend (USD) in PNG by North America and Europe Visitors

North America – US \$93 per day



Europe – US \$87 per day



Presentation Structure



Information Sources and Decision Making

51

How did you find out about PNG? All Visitors



39% Friends and Family
38% Previous Visits
28% Business/Volunteer organisation

How did you purchase your travel? All Visitors



32% Travel Agent
31% By Myself
29% By Others

How did you find out about PNG? Holiday Visitors



48% Friends and Family
27% Previous Visits
15% Travel agent/agency brochures

How did you purchase your travel? Holiday Visitors



38% Travel Agent
35% By Myself
15% By Others

Information Sources and Decision Making

52

What influenced your decision making*? All Visitors



2.9/5 Business and Conference



2.8/5 Culture and History



2.7/5 Nature attractions/ecotourism/photography

What influenced your decision making*? Holiday Visitors



3.6/5 Culture and History



3.2/5 Nature Attractions, Ecotourism, Photography



2.9/5 Adventure Experiences

Information Sources and Decision Making

53



Information Sources for Planning All Visitors

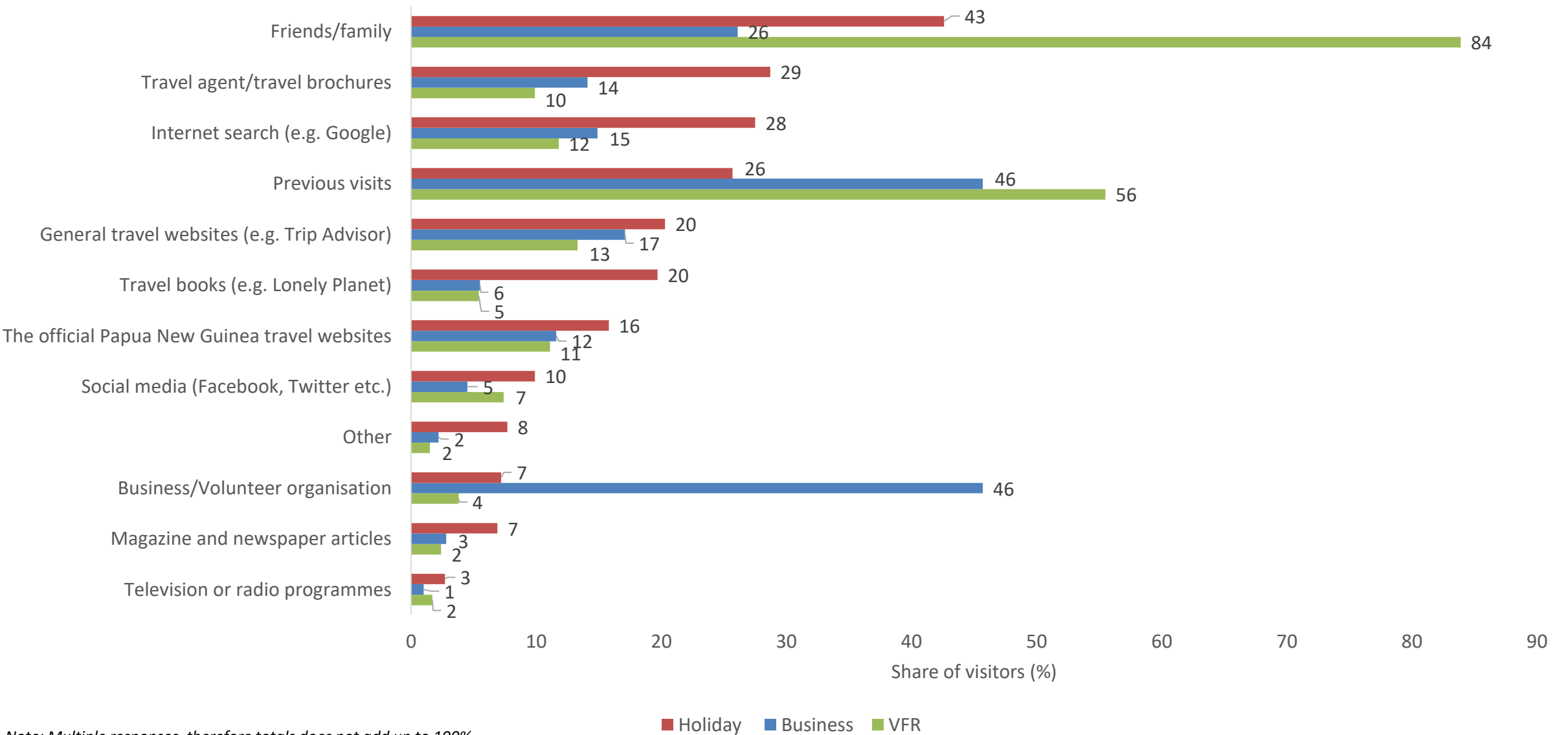
- 43%** Friends and Family
- 41%** Previous Visits
- 25%** Business/Volunteer organisation
- 19%** Internet Search (e.g. Google)



Information Sources for Planning Holiday Visitors

- 43%** Friends and Family
- 29%** Travel Agent/Agency Brochures
- 28%** Internet Search (e.g. Google)
- 26%** Previous Visits

Sources Used for Planning – Purpose of Visit



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

Travel Purchasing Behaviour – Source Market

55

Made my own travel arrangements using the internet



| | |
|-----|---------------|
| 35% | Australia |
| 30% | New Zealand |
| 24% | Asia |
| 10% | Pacific |
| 38% | North America |
| 33% | Europe |

Arrangements were made by a travel agent



| | |
|-----|---------------|
| 31% | Australia |
| 35% | New Zealand |
| 32% | Asia |
| 38% | Pacific |
| 36% | North America |
| 31% | Europe |

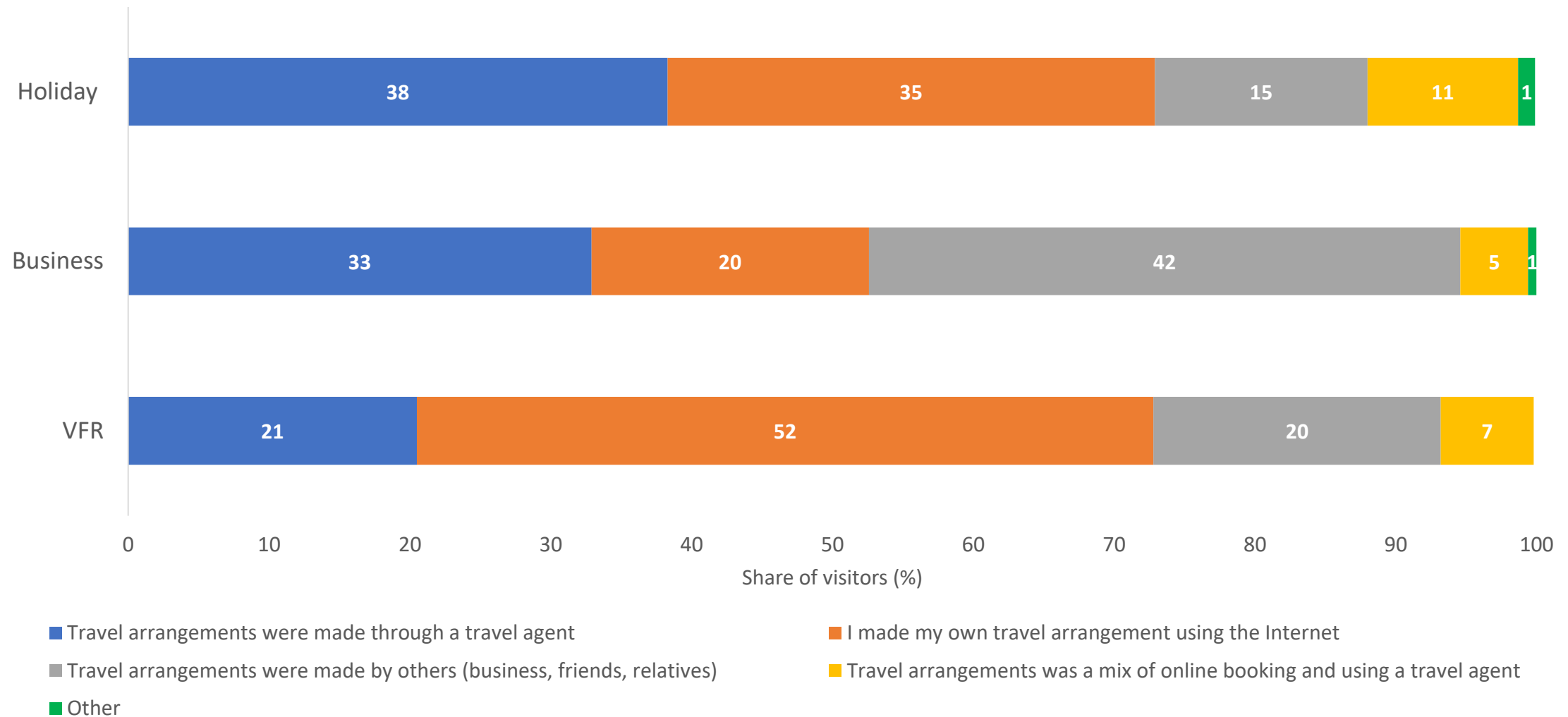
Travel arrangements were made by others



| | |
|-----|---------------|
| 27% | Australia |
| 27% | New Zealand |
| 37% | Asia |
| 43% | Pacific |
| 15% | North America |
| 20% | Europe |

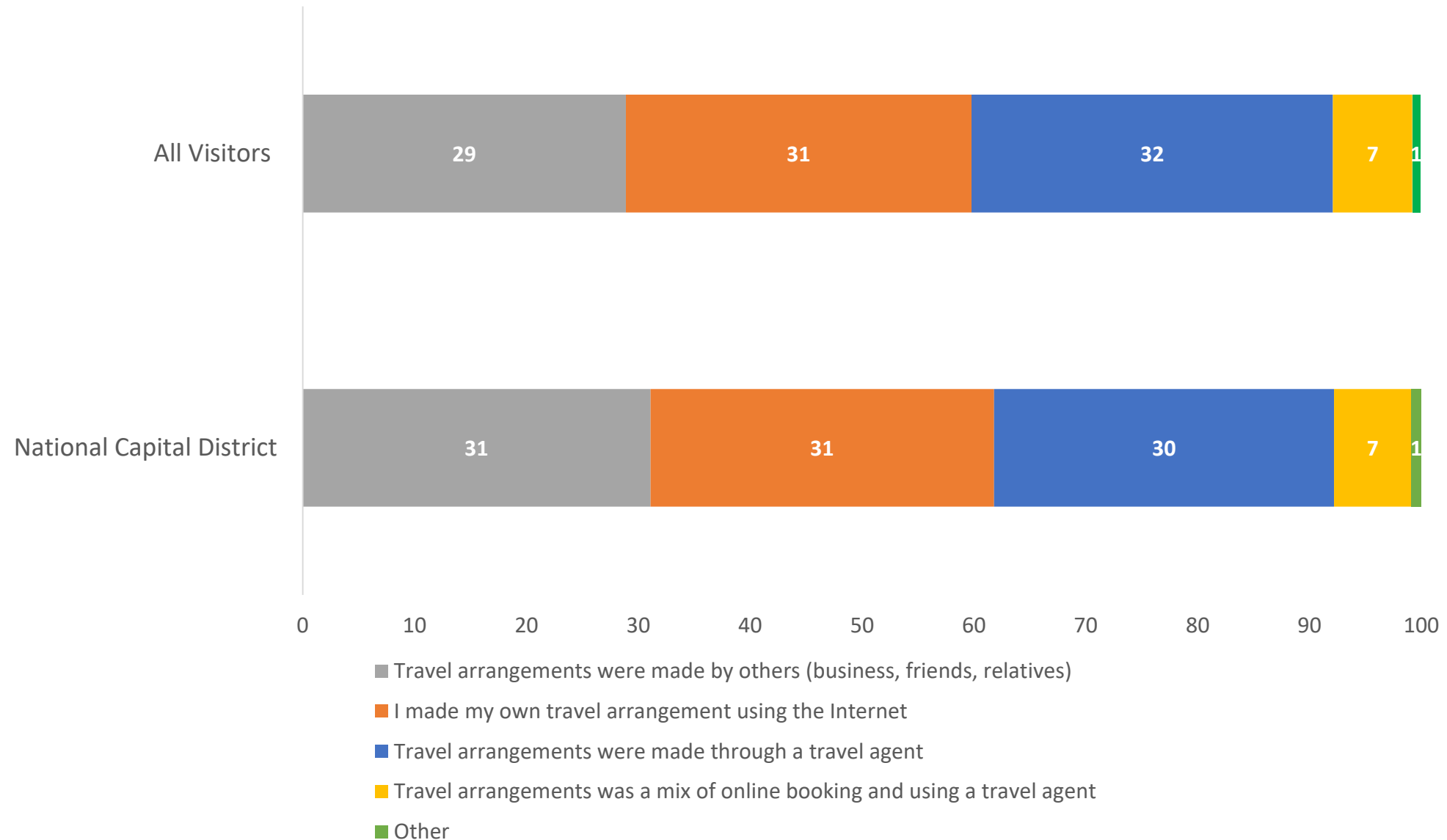
Travel Purchasing Behaviour – Purpose of Visit

56



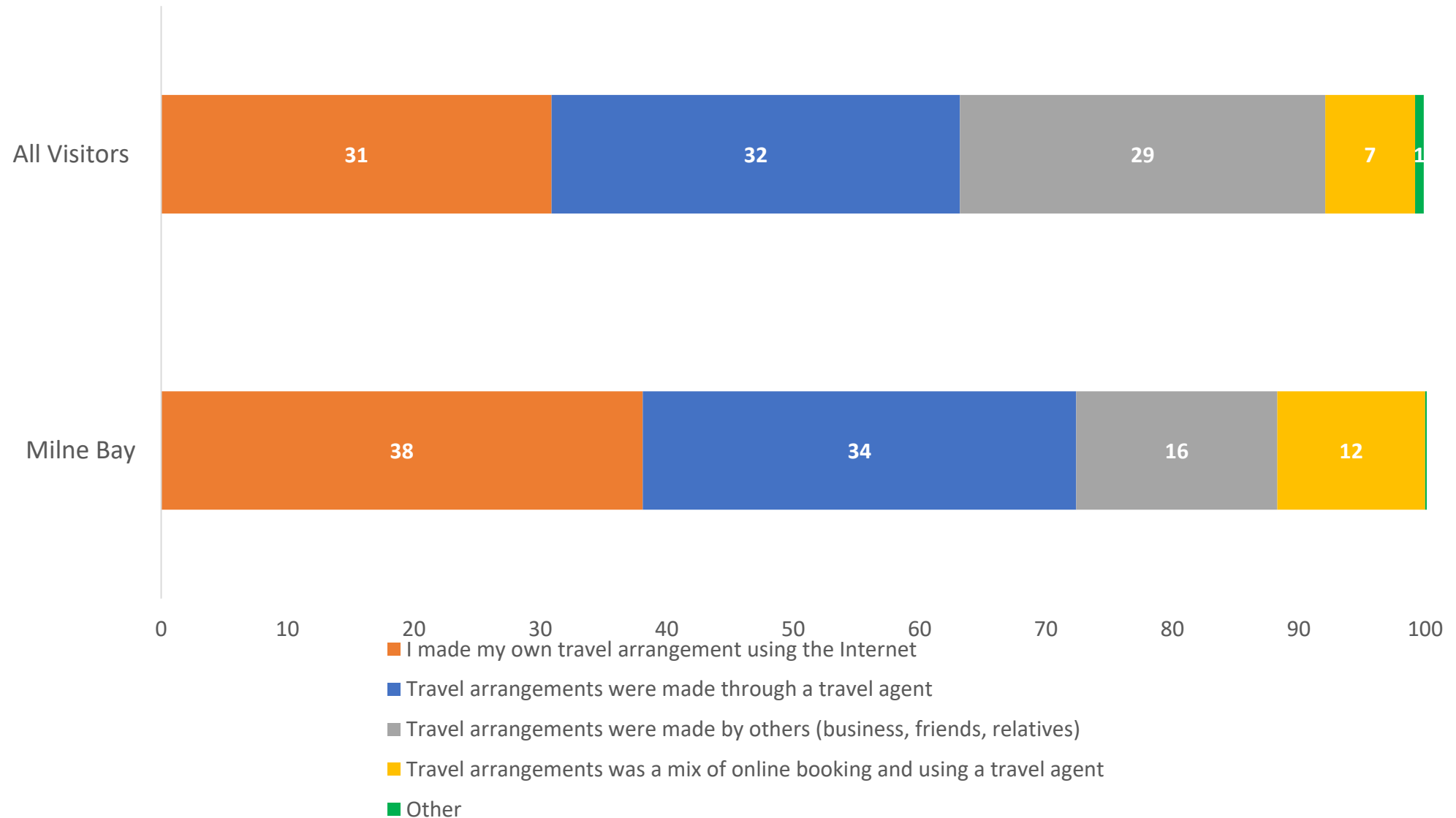
Travel Purchasing Behaviour – National Capital District

57



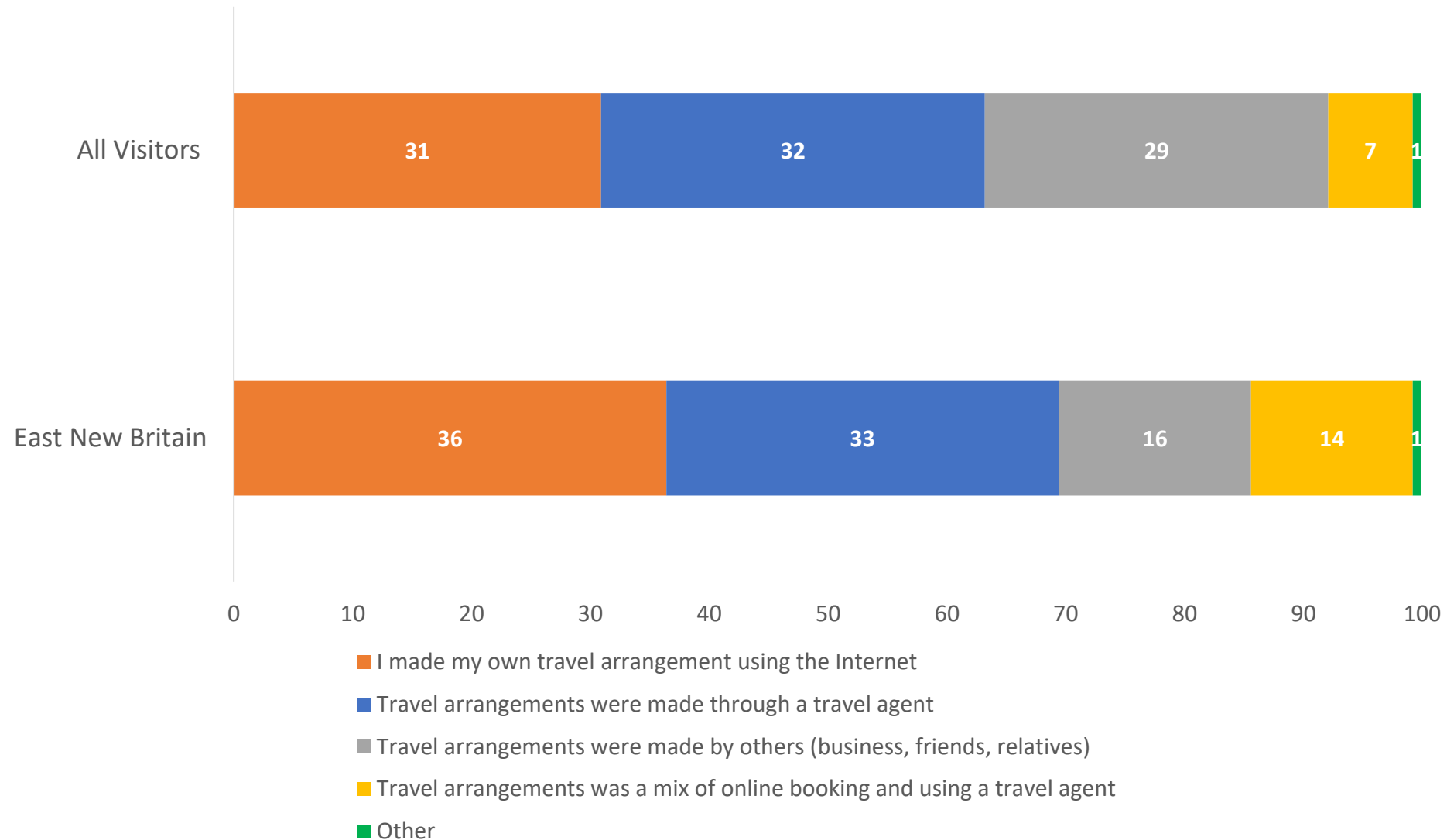
Travel Purchasing Behaviour – Milne Bay

58



Travel Purchasing Behaviour – East New Britain

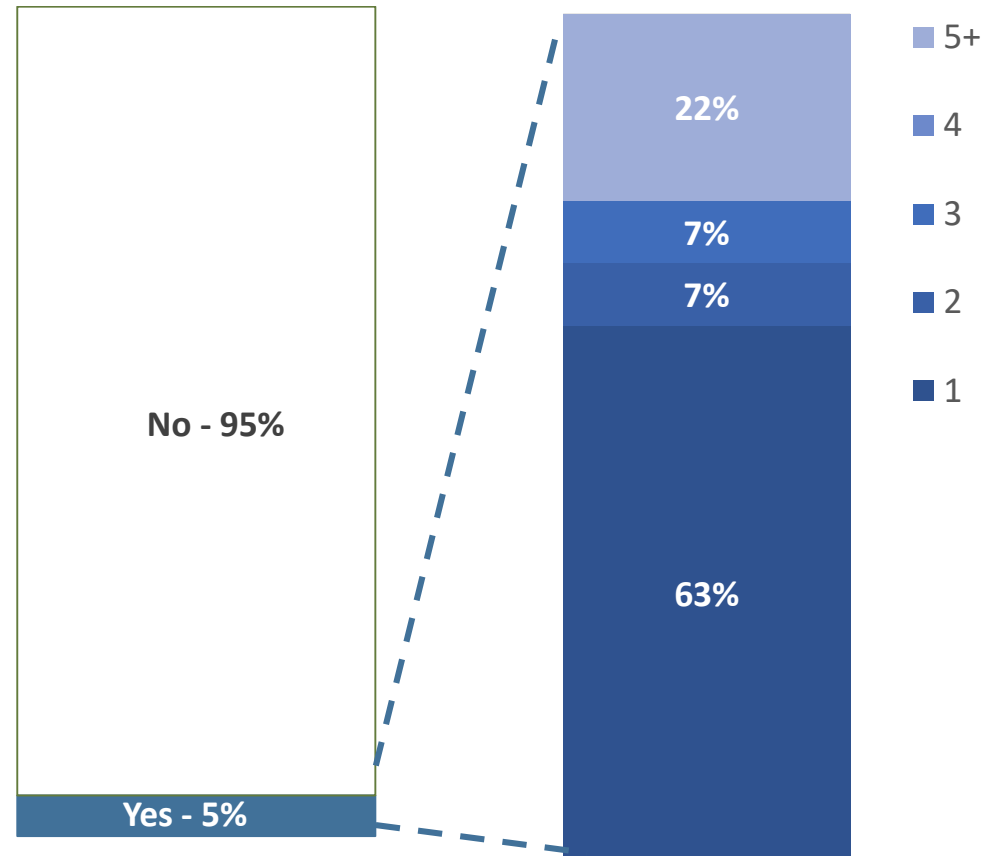
59



Cruise visits to PNG – Australia and New Zealand Holiday Visitors

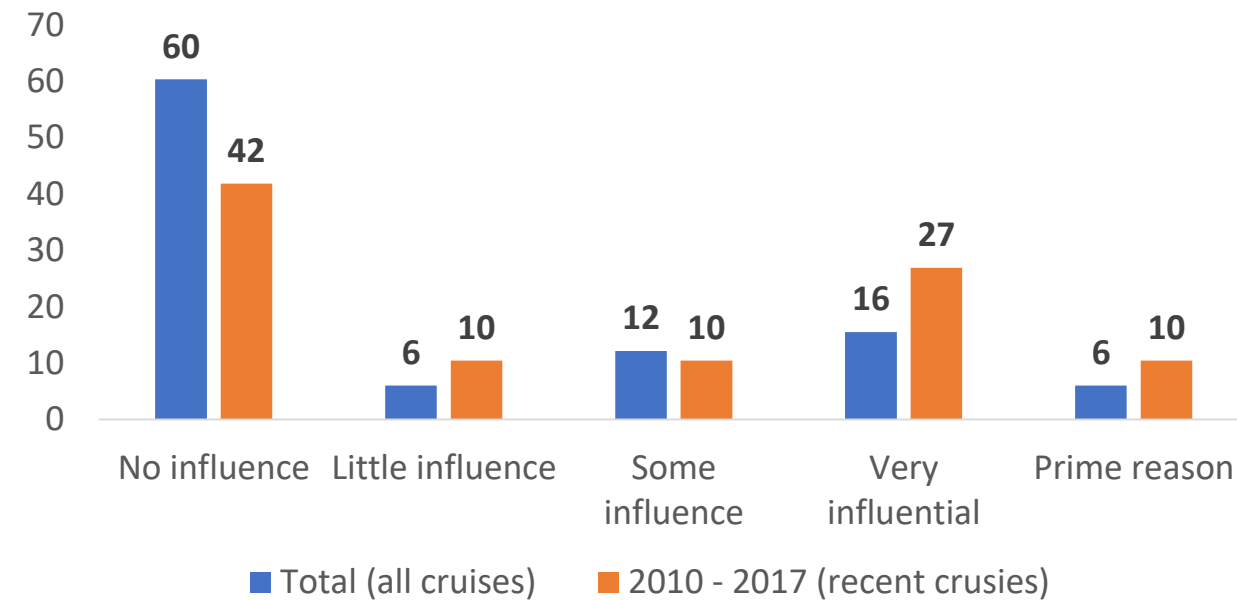
60

Been on a cruise to PNG before?



If Yes, how many times?

Did a previous cruise influence your decision to come back to PNG?

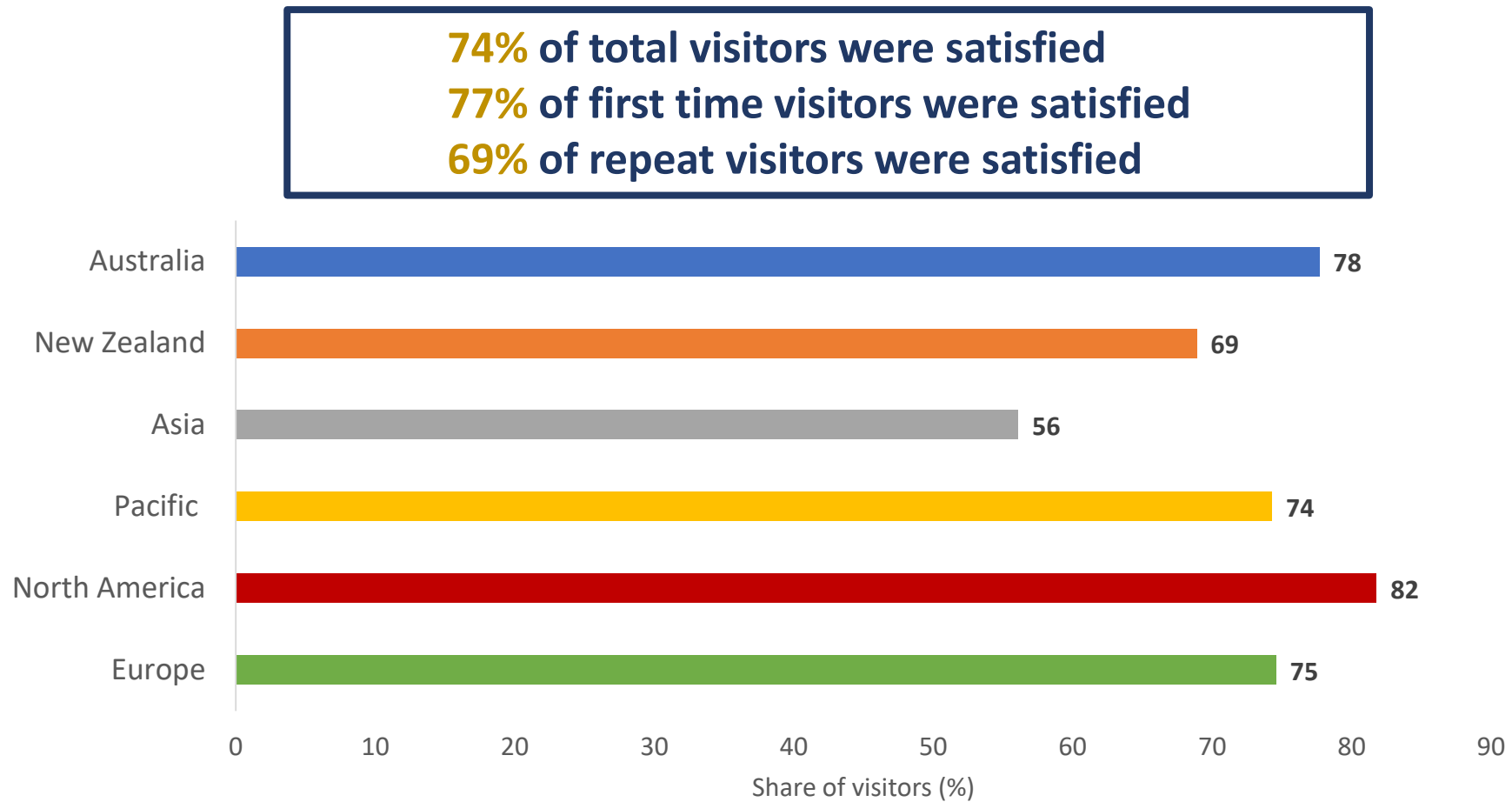


Presentation Structure



Visitor Satisfaction* by Country and Purpose of Visit

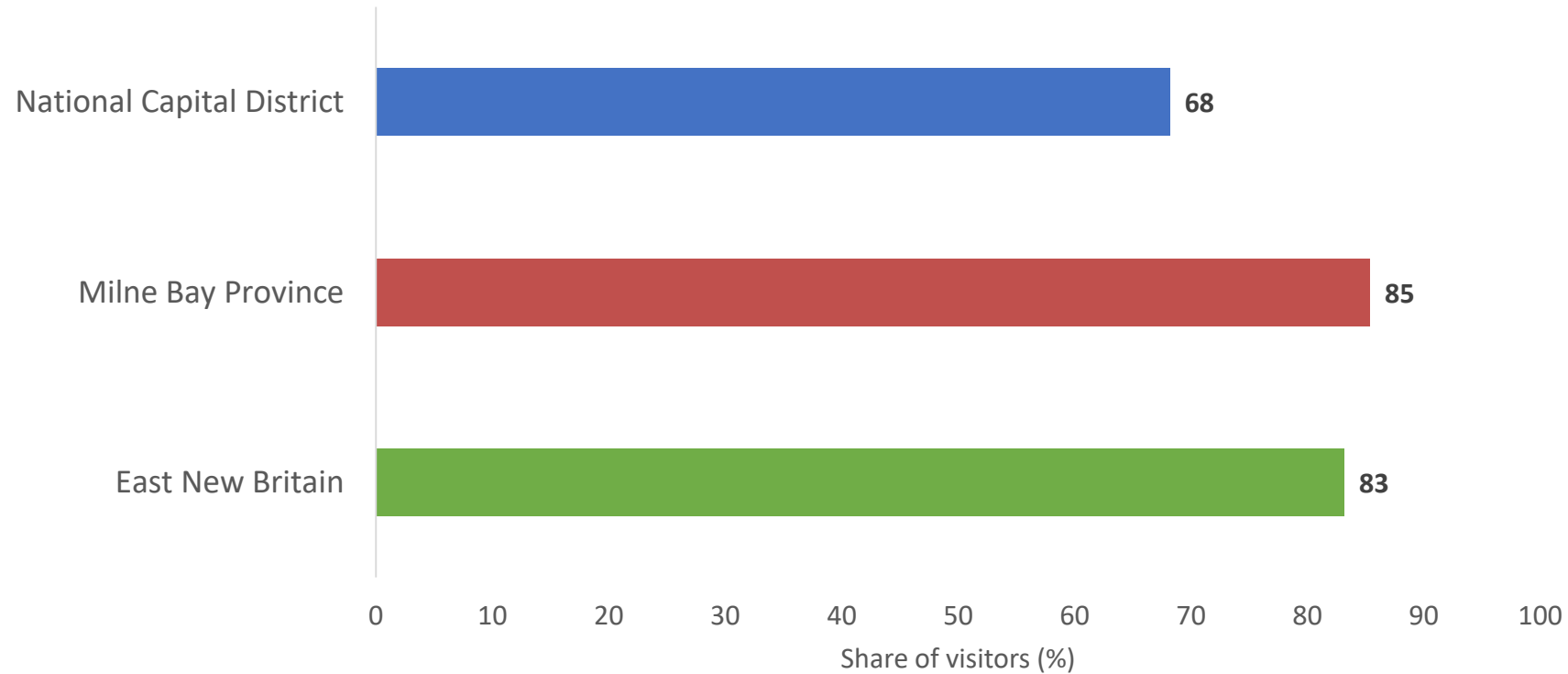
62



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

Visitor Satisfaction* by Region

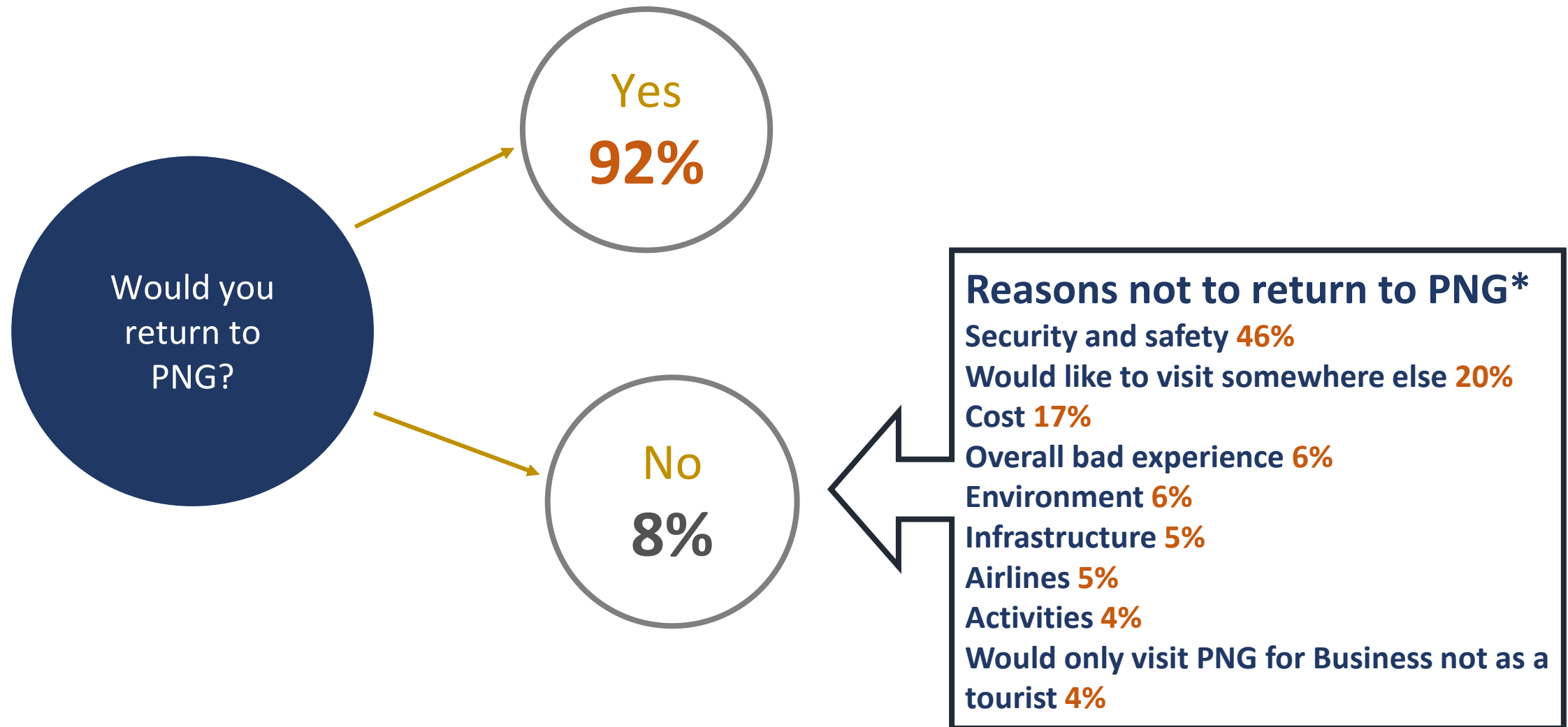
63



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

Willingness to Return – All Visitors

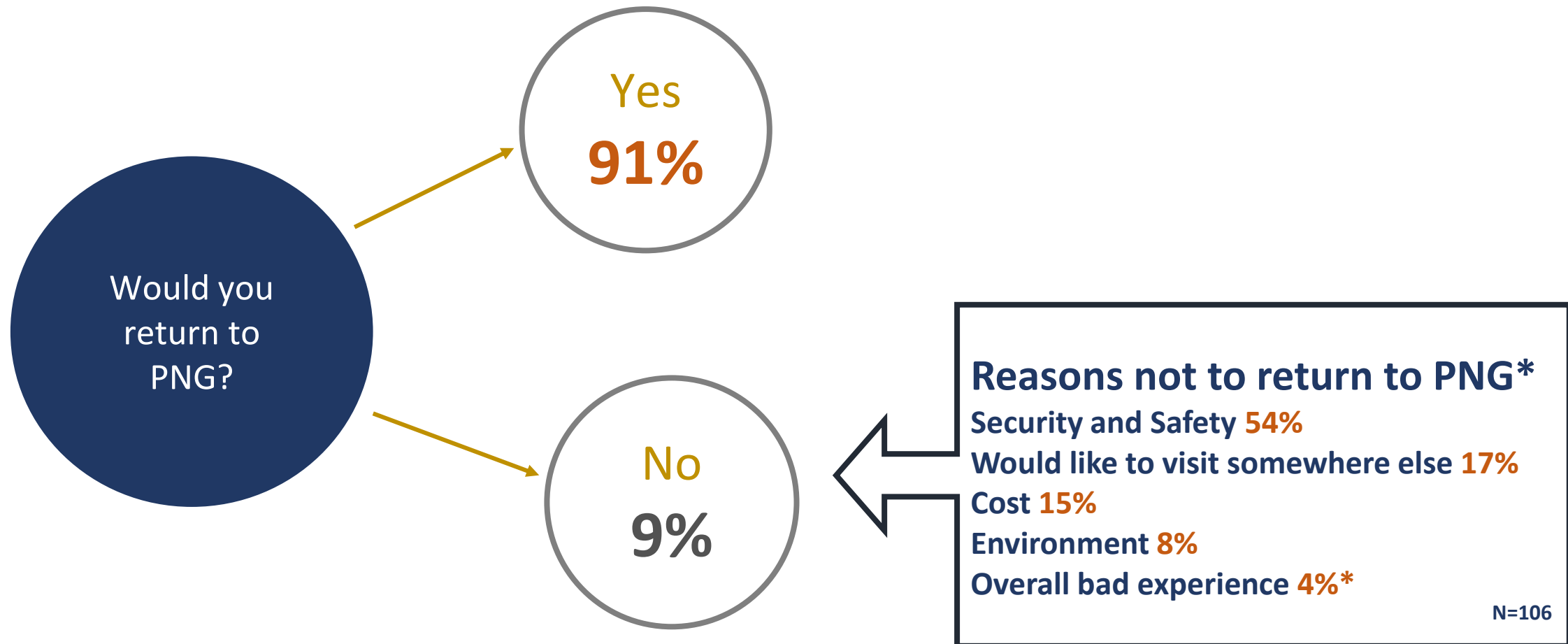
64



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

Willingness to Return – National Capital District Visitors

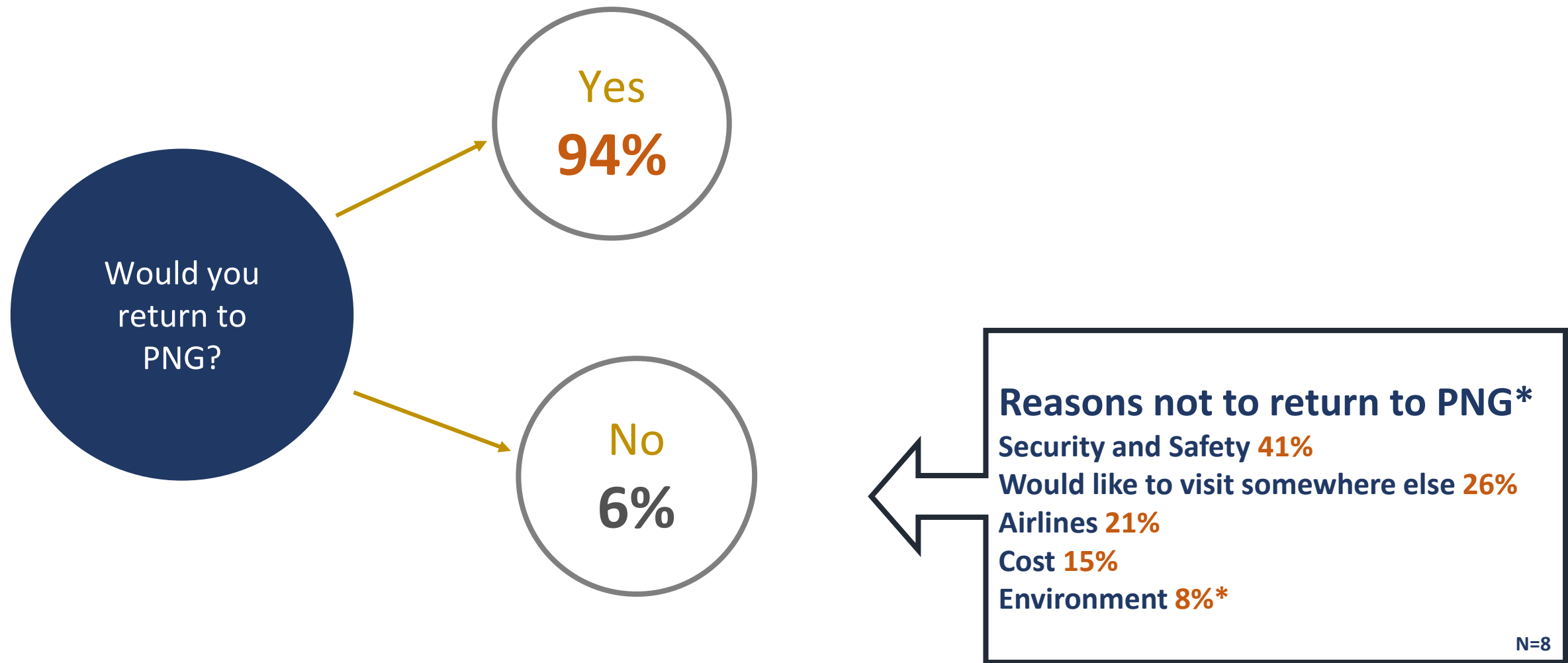
65



* Other reasons have not been included due to low percentages

Willingness to Return –Milne Bay Visitors

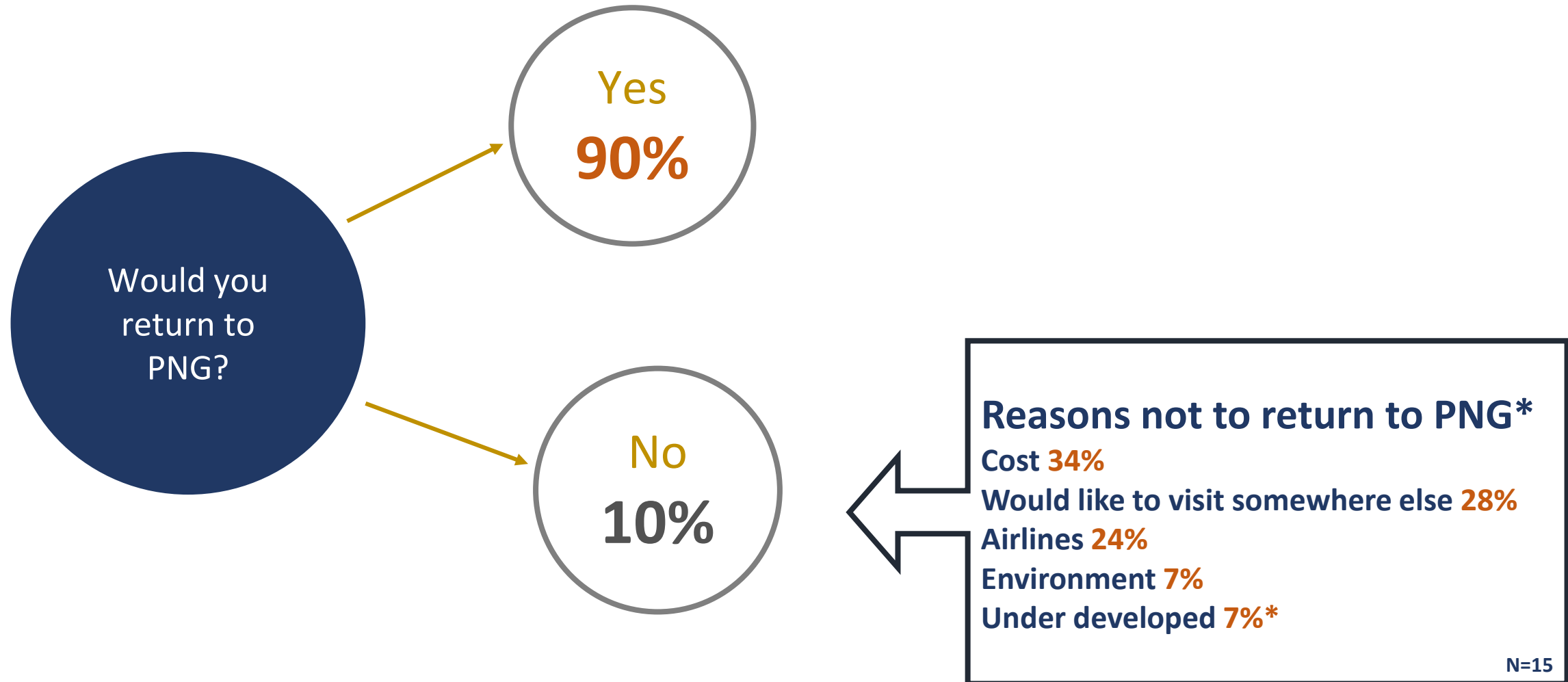
66



* Other reasons have not been included due to low percentages

Willingness to Return – East New Britain Visitors

67



* Other reasons have not been included due to low percentages

Least and Most Appealing – Overall and Holiday Visitors

68



Most Appealing – All Visitors

- 43% People
- 30% Scenery or Landscape
- 25% Activities and Attractions



Least Appealing – All Visitors

- 34% Safety and Security
- 26% Environment and Rubbish
- 18% Infrastructure



Most Appealing - Holiday Visitors

- 43% People
- 39% Activities and Attractions
- 32% Scenery or Landscape

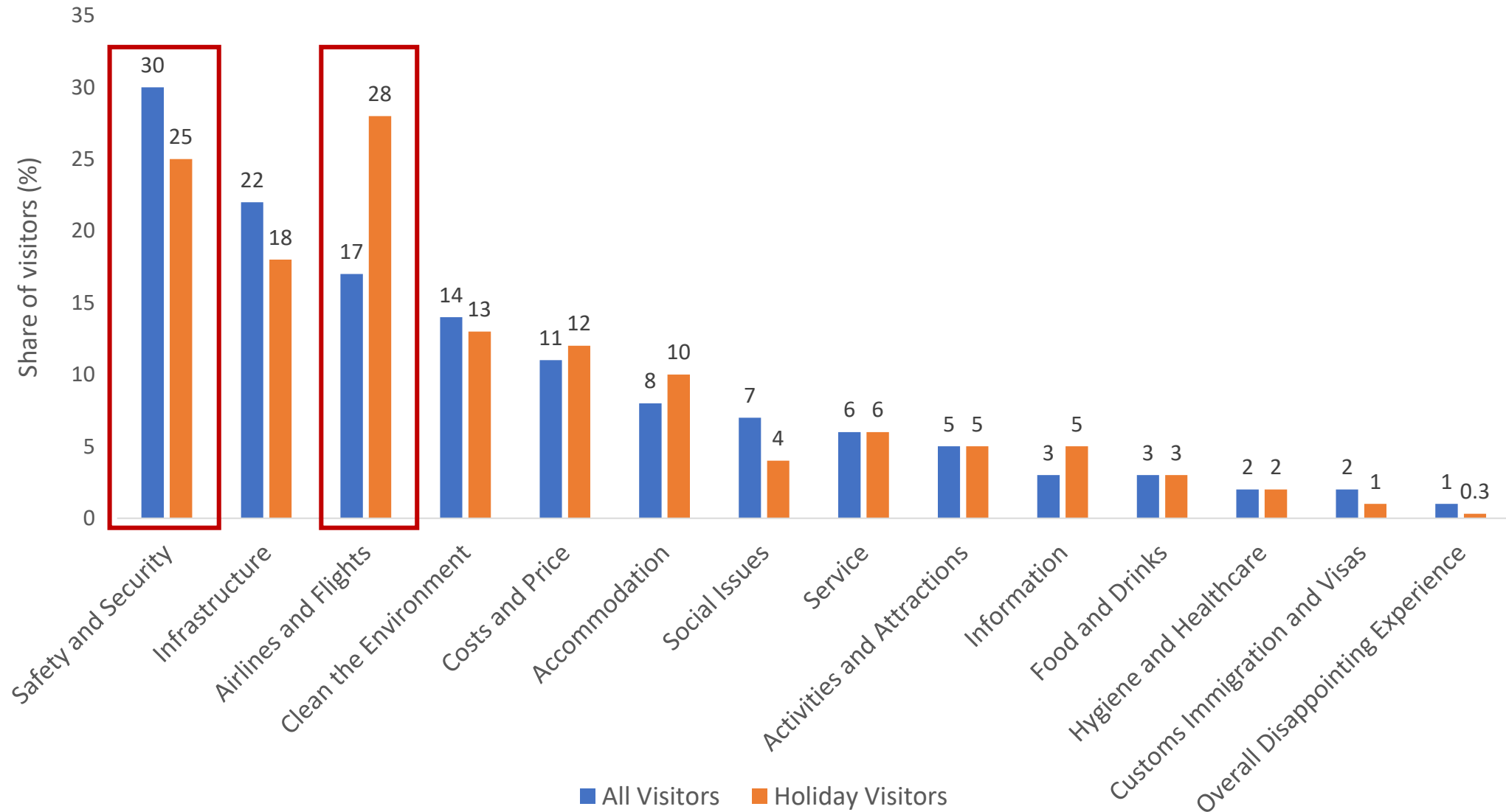


Least Appealing - Holiday Visitors

- 28% Safety and Security
- 27% Environment and Rubbish
- 16% Infrastructure

Suggestions for Improvement – All Visitors and Holiday Visitors

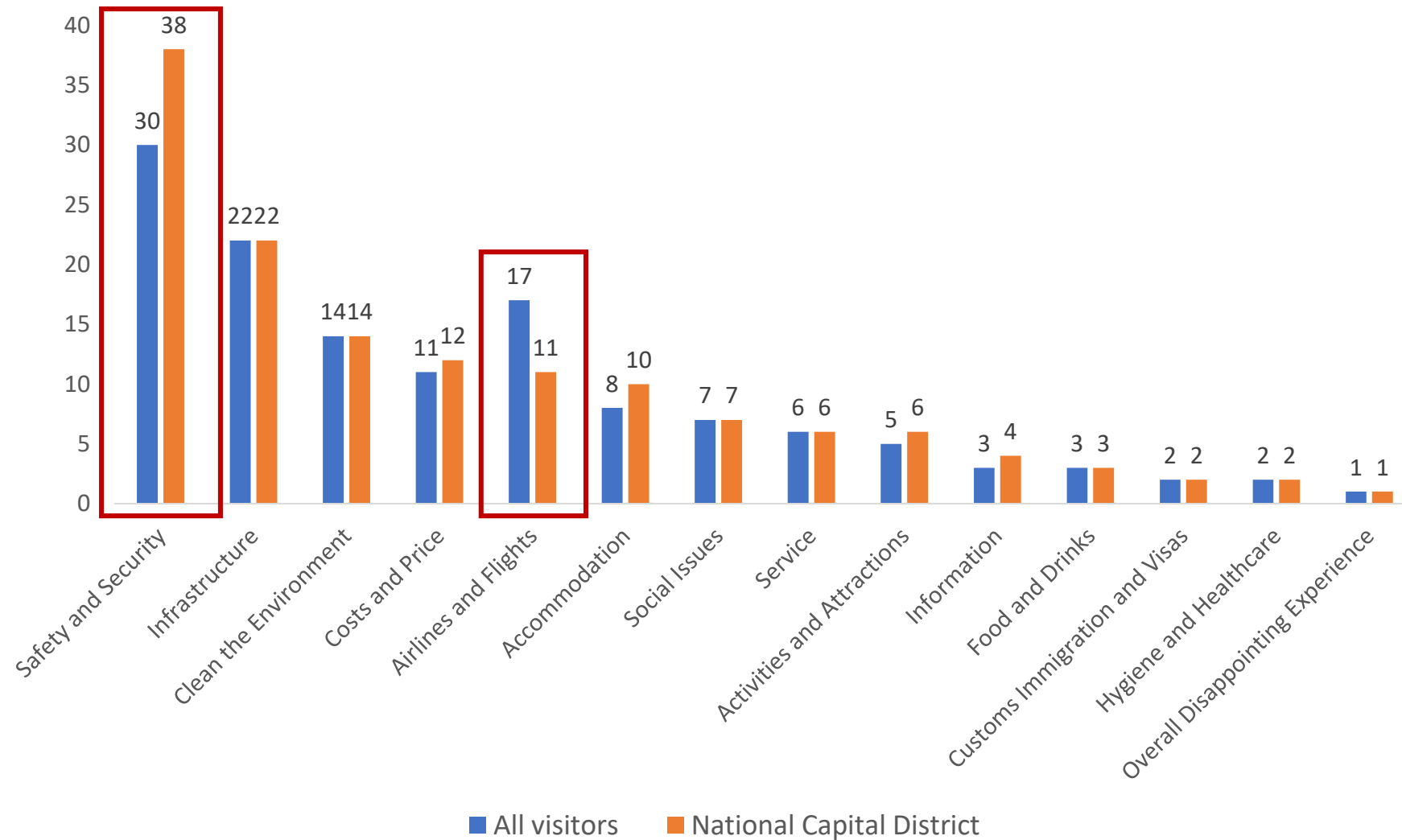
69



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

Suggestions for Improvement – National Capital District

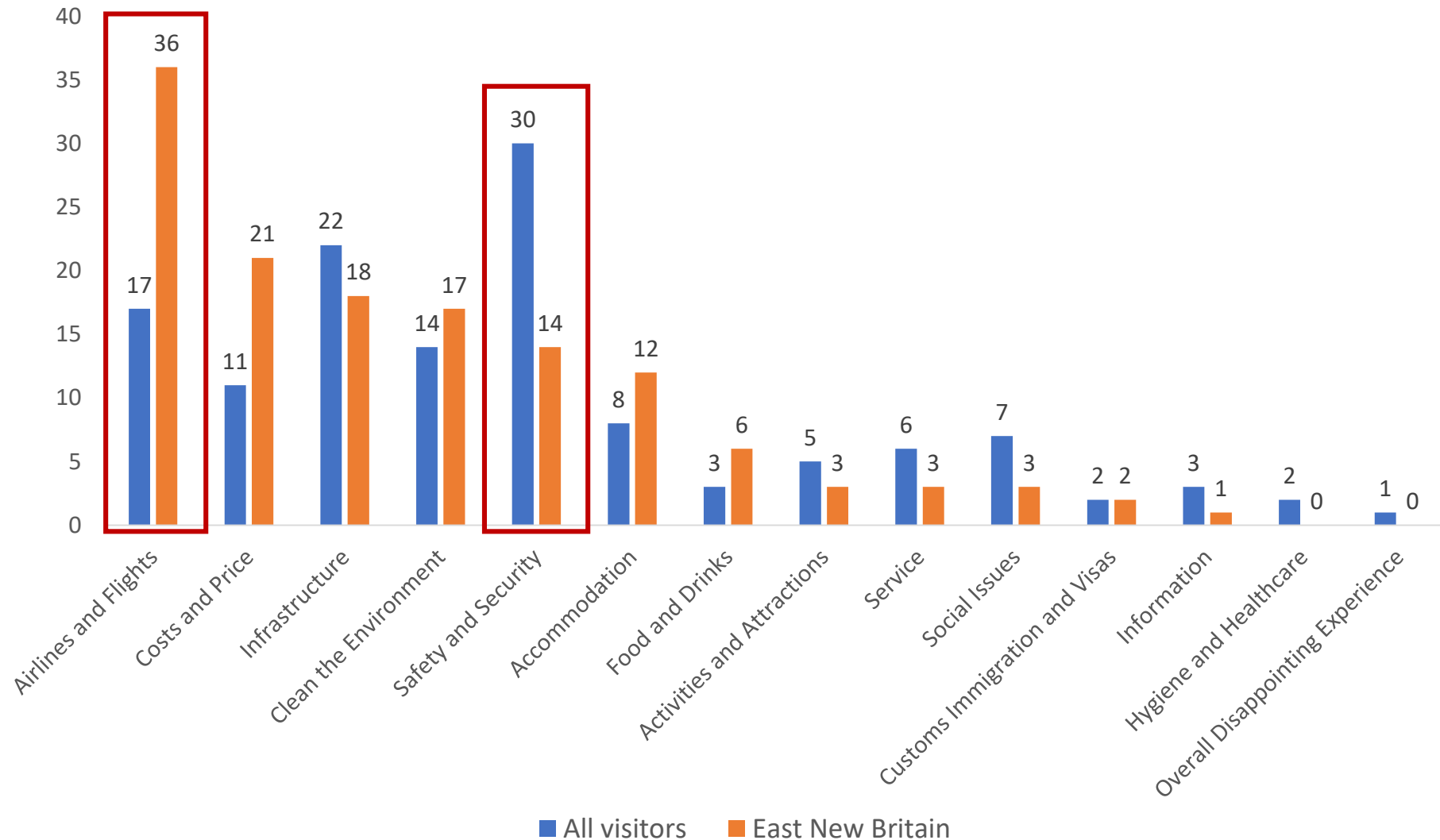
70



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

Suggestions for Improvement – East New Britain

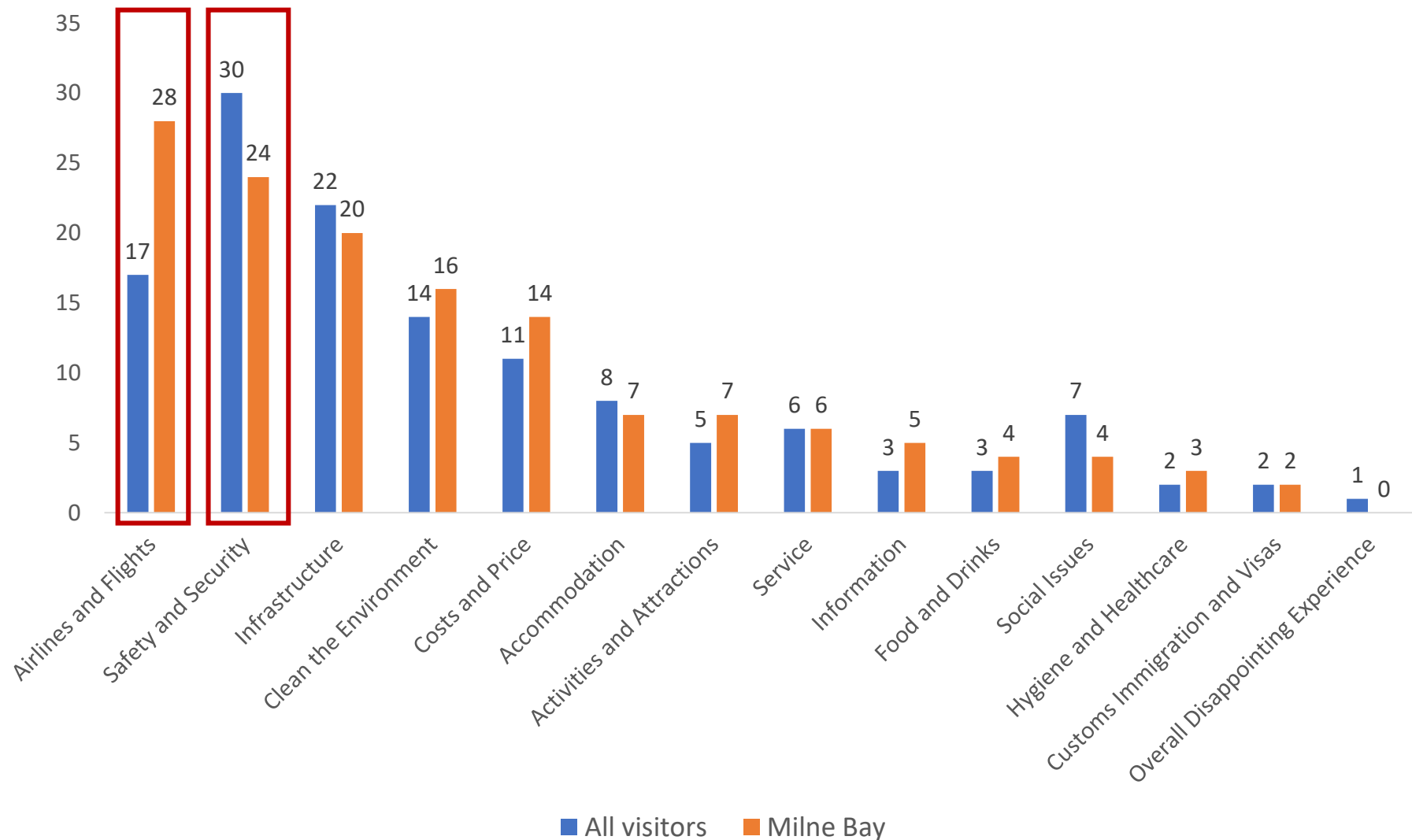
71



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

Suggestions for Improvement – Milne Bay

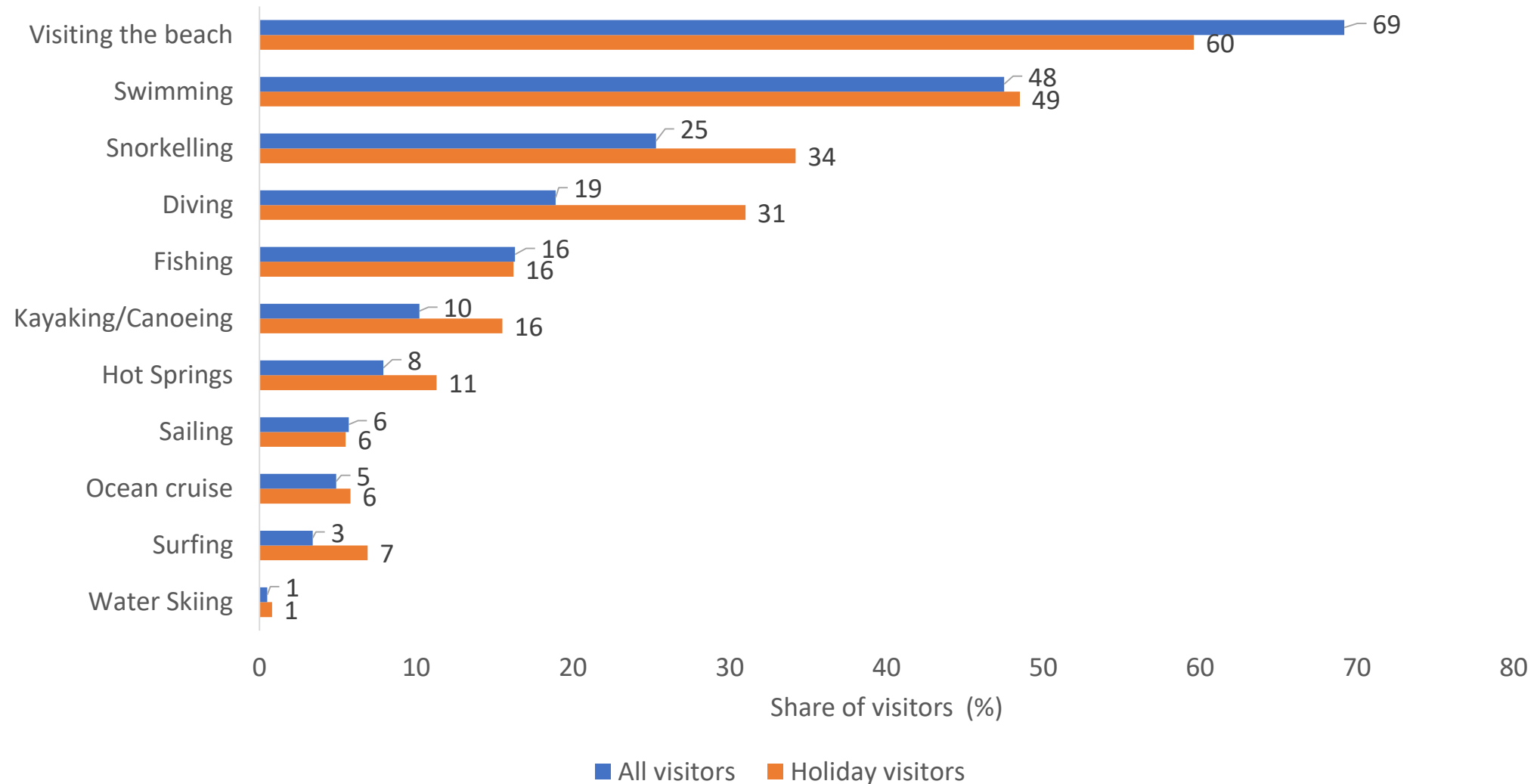
72



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

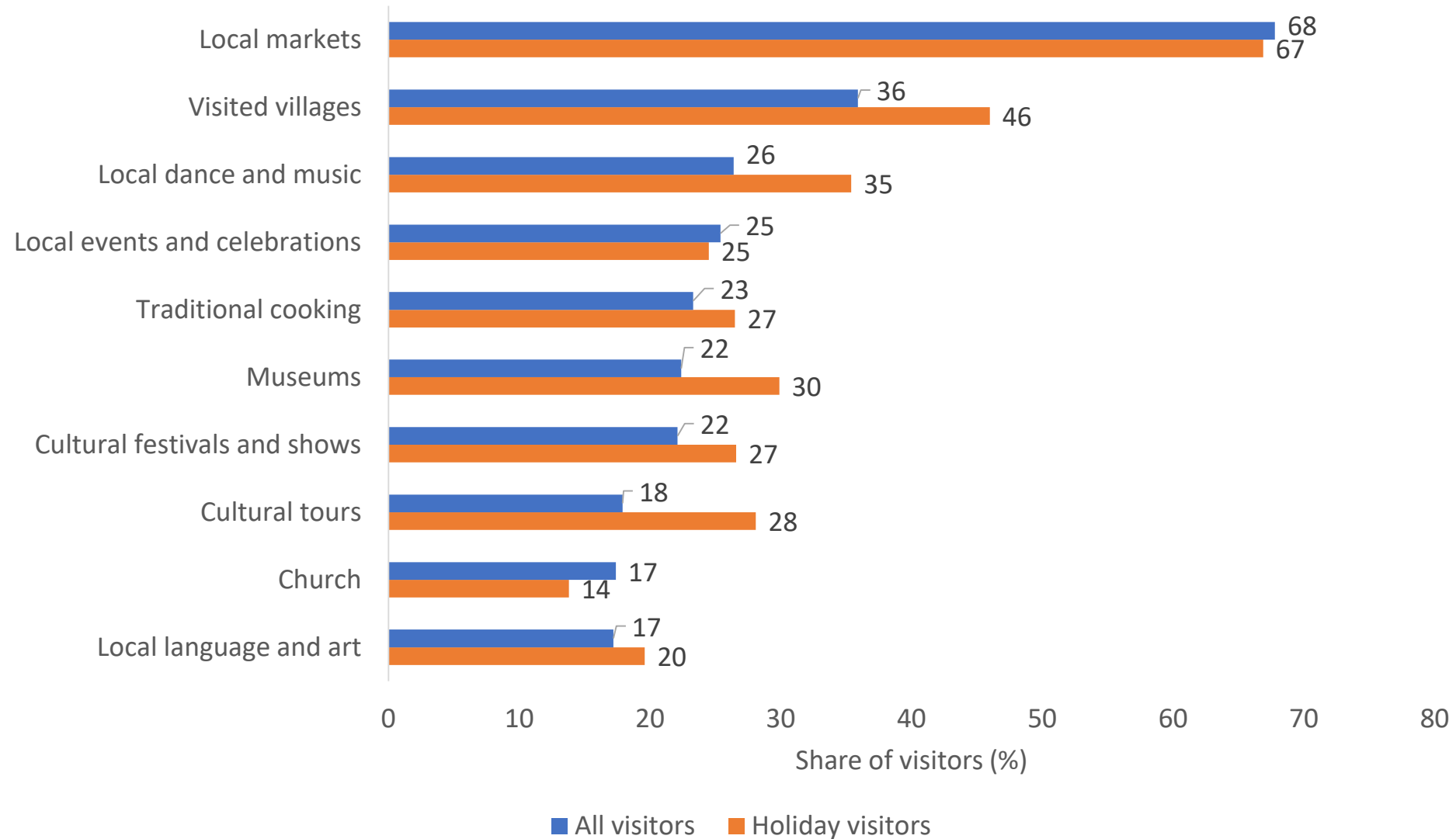
Participation in Water Based Activities – All Visitors vs Holiday Visitors

73



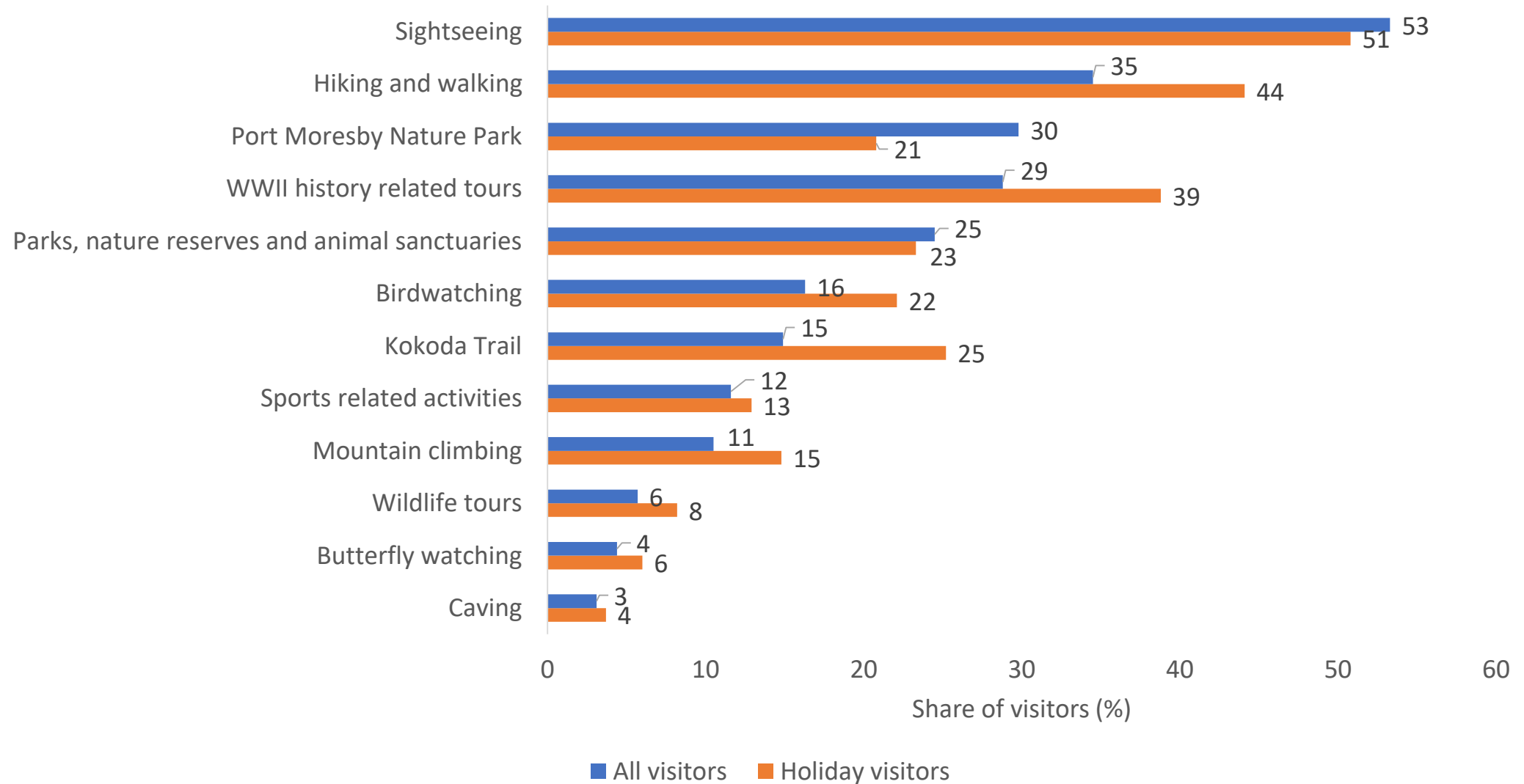
Participation in Cultural Based Activities – All Visitors vs Holiday Visitors

74



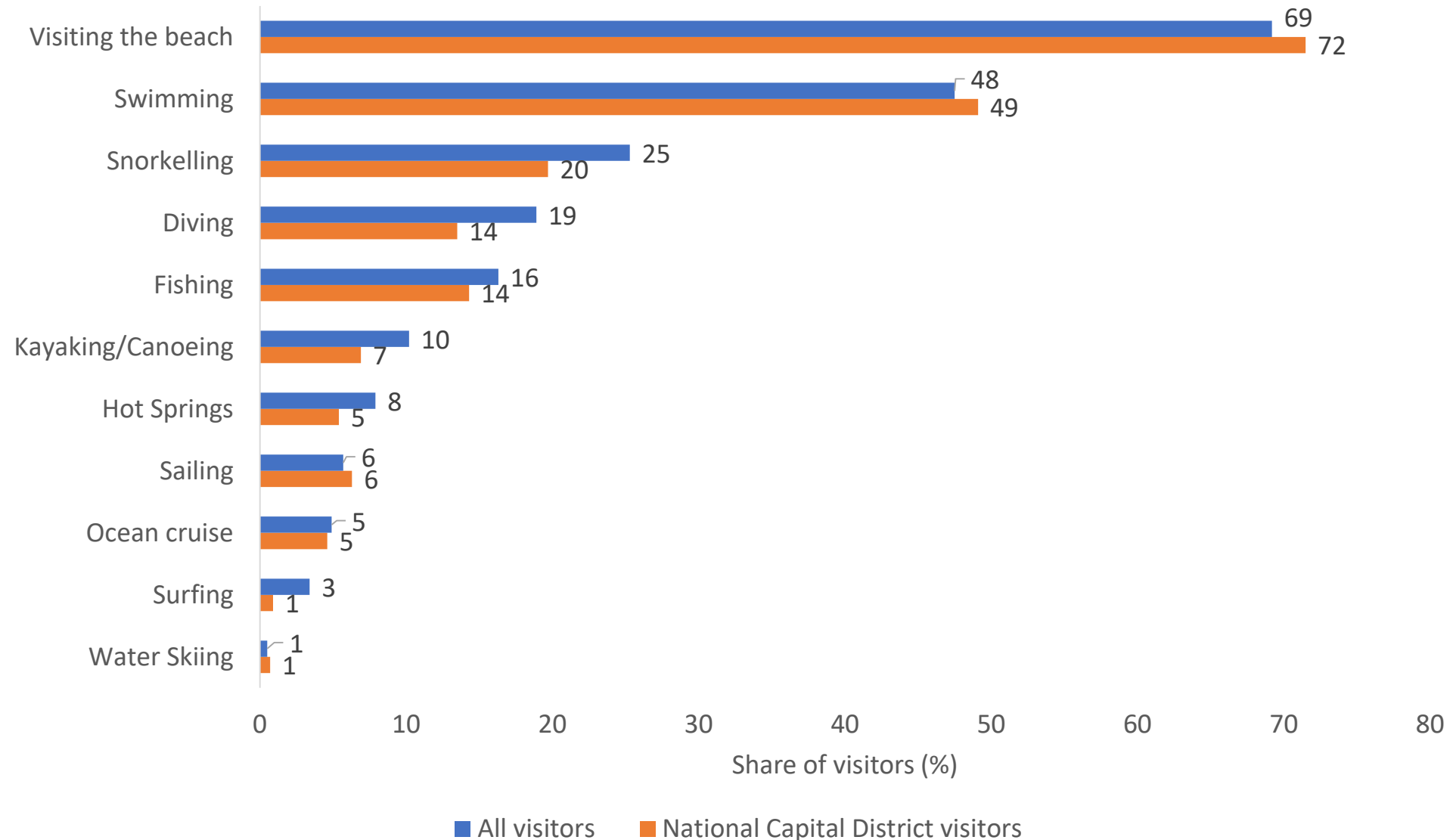
Participation in Land Based Activities – All Visitors vs Holiday Visitors

75



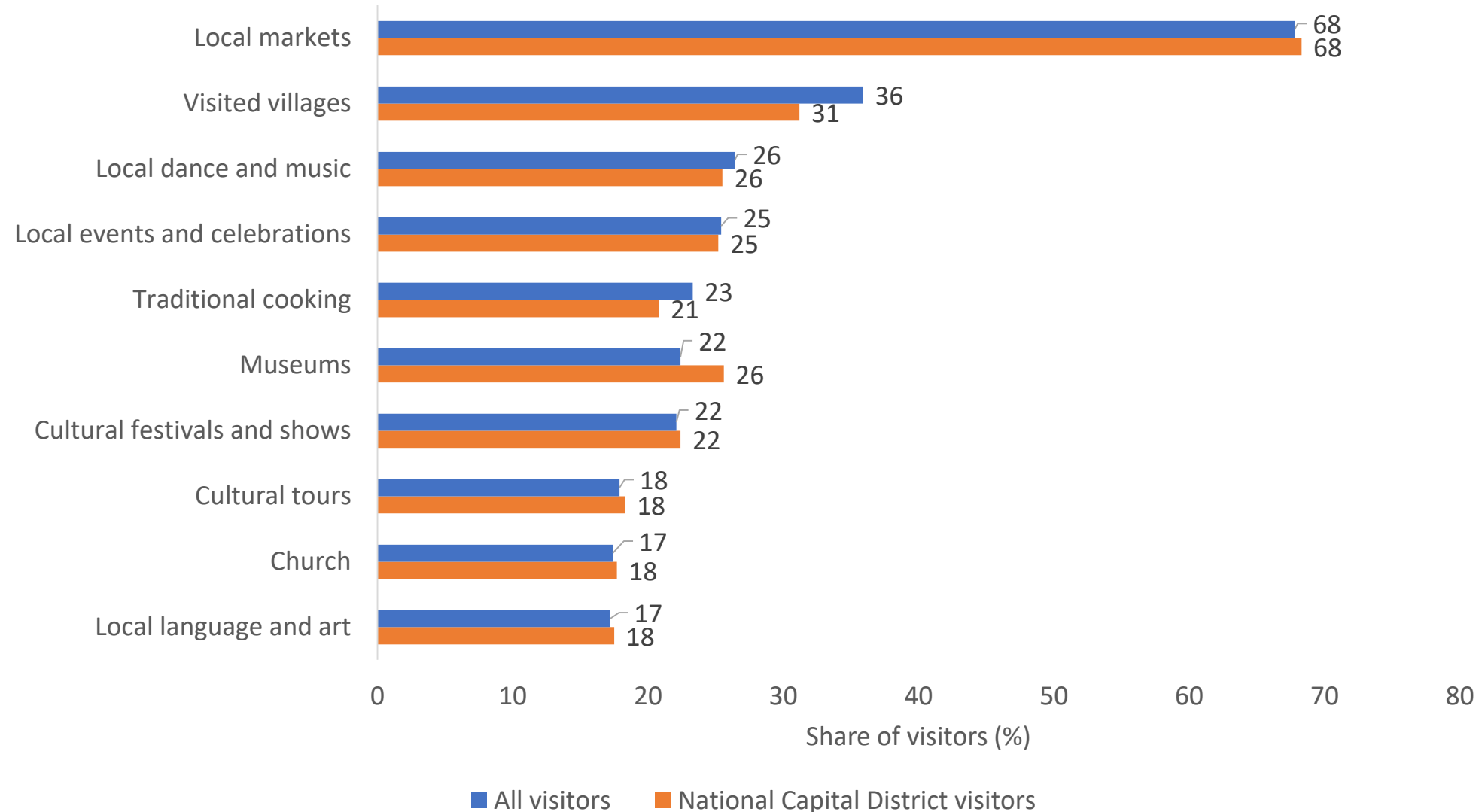
Participation in Water Based Activities – All Visitors vs National Capital District Visitors

76



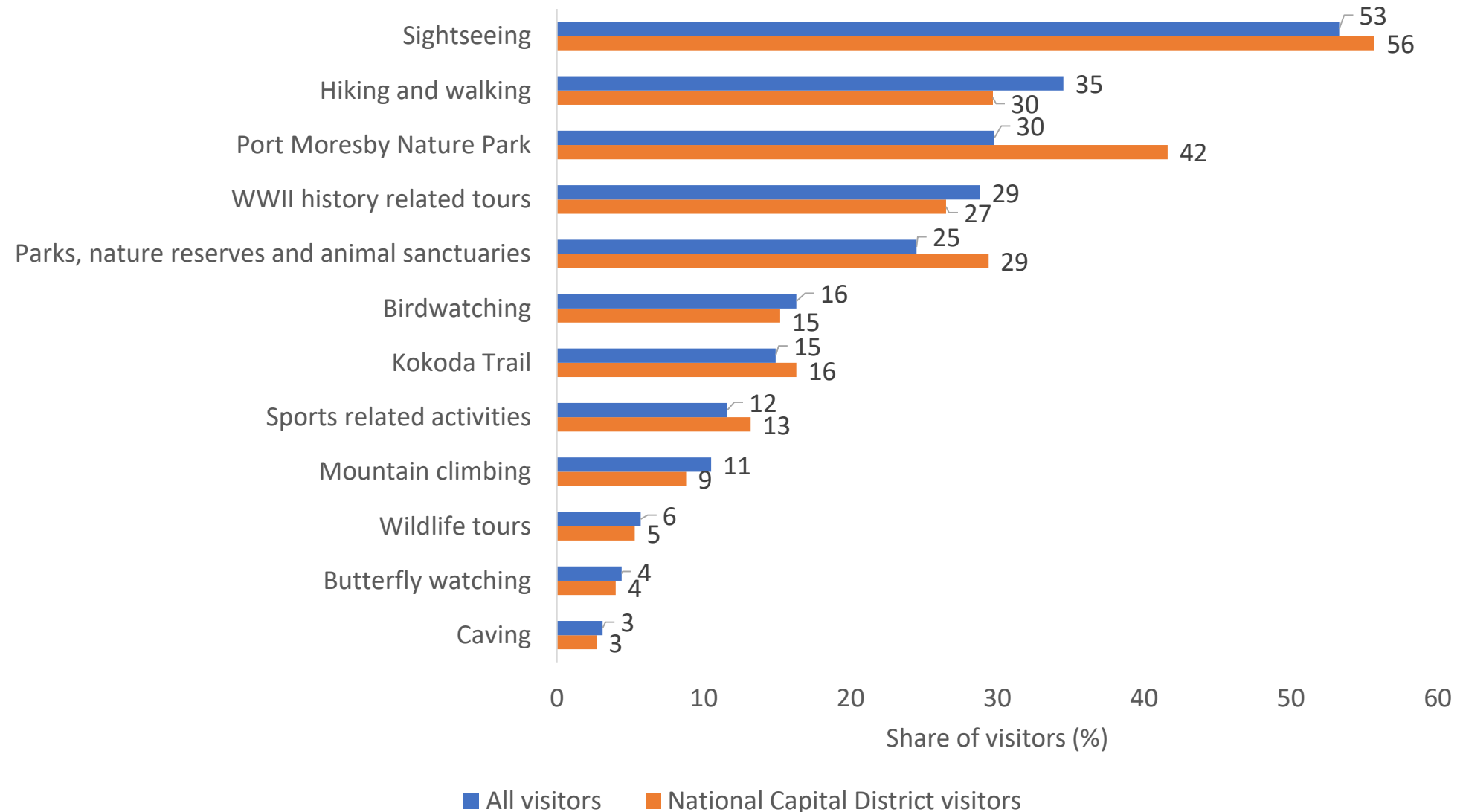
Participation in Cultural Based Activities – All Visitors vs National Capital District Visitors

77



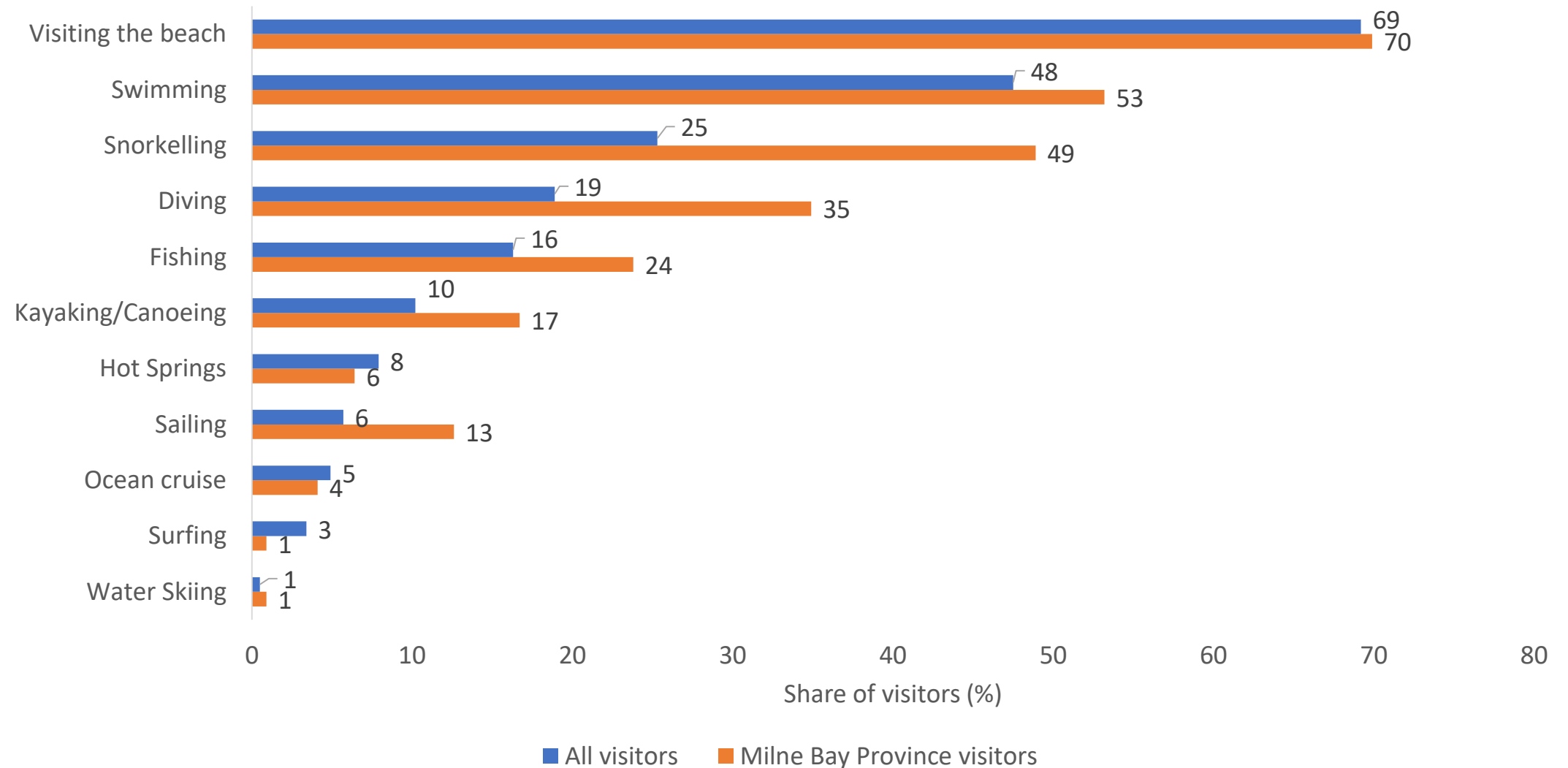
Participation in Land Based Activities – All Visitors vs National Capital District Visitors

78



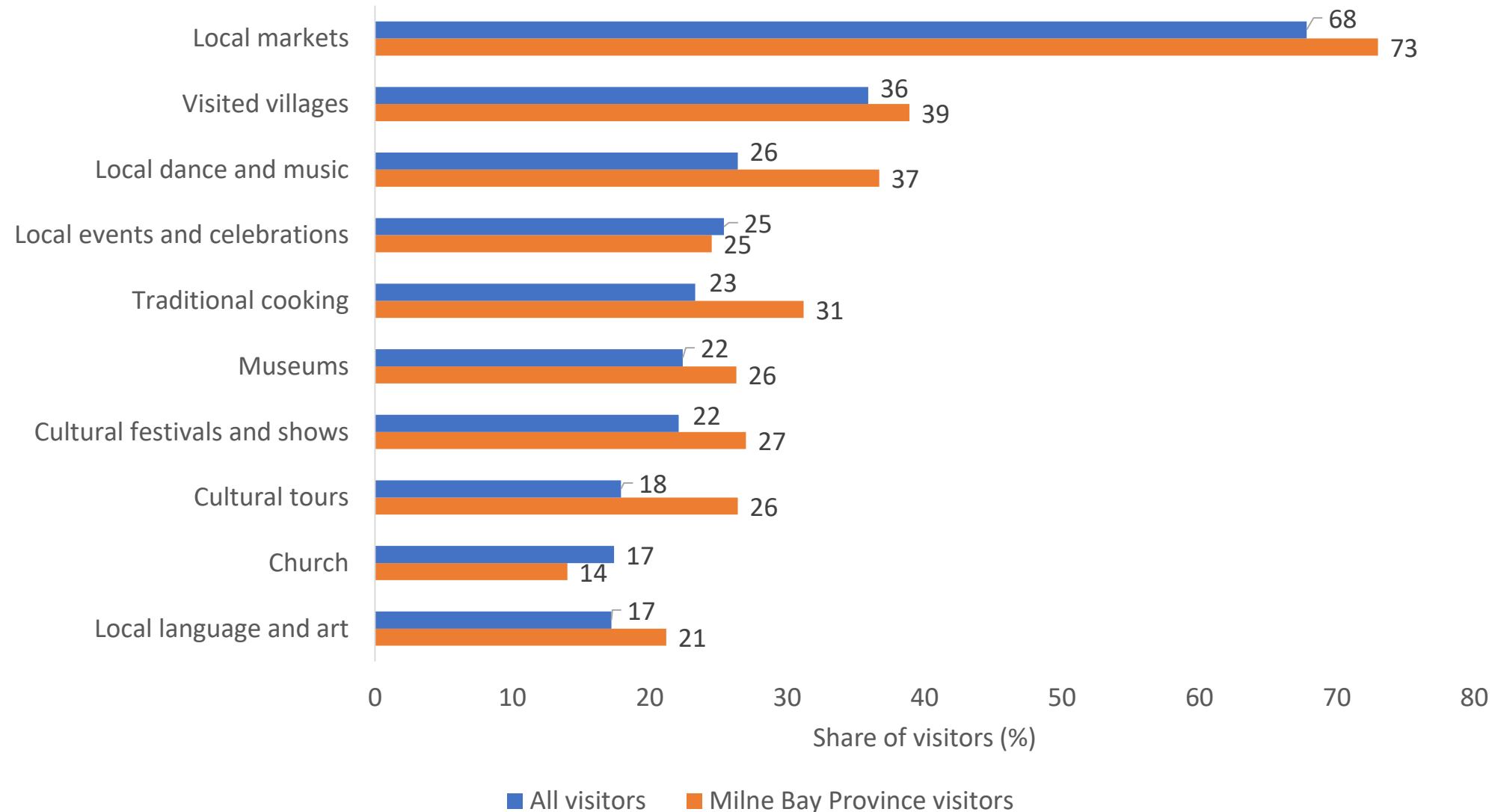
Participation in Water Based Activities – All Visitors vs Milne Bay Province Visitors

79



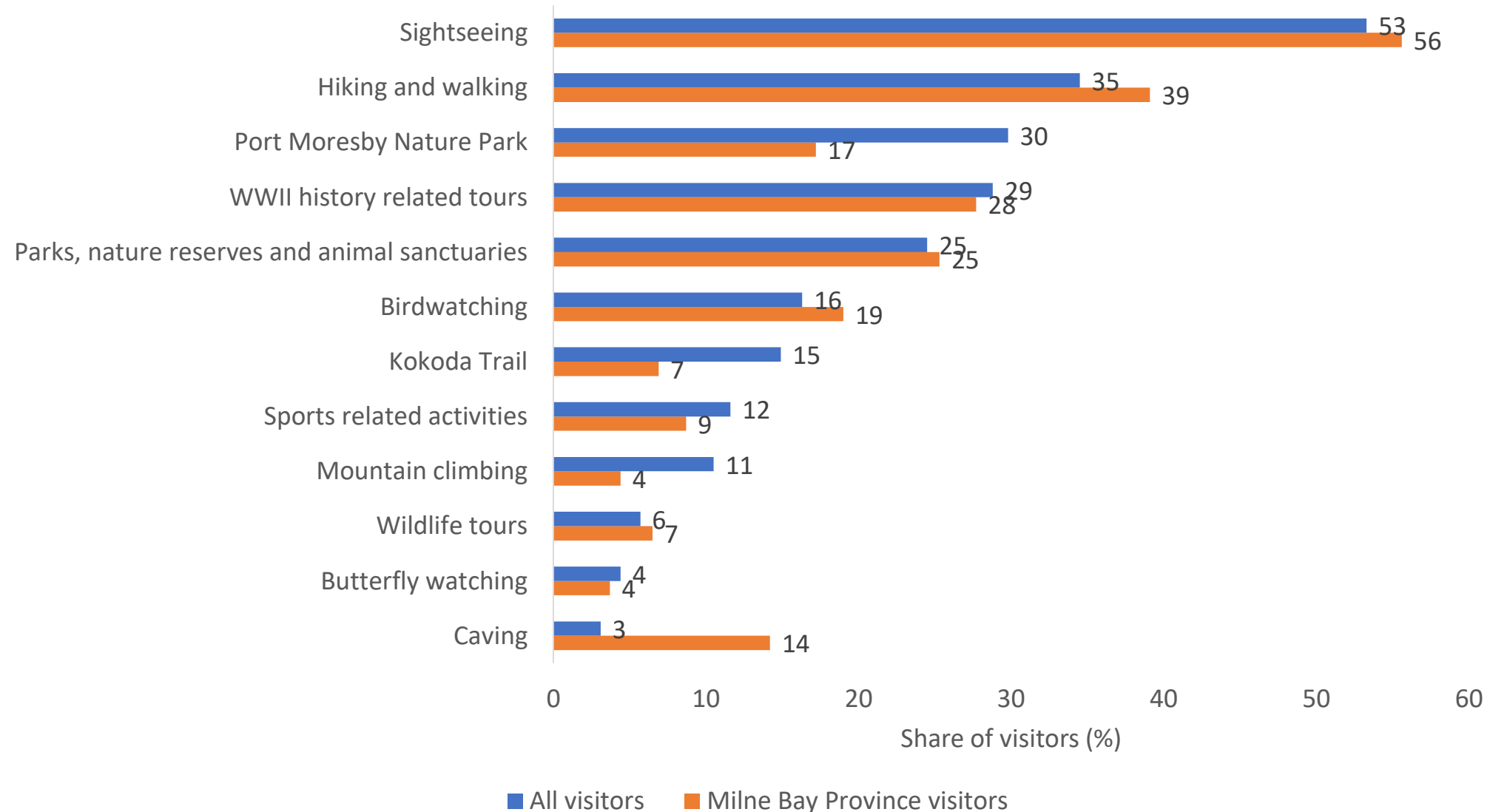
Participation in Cultural Based Activities – All Visitors vs Milne Bay Province Visitors

80



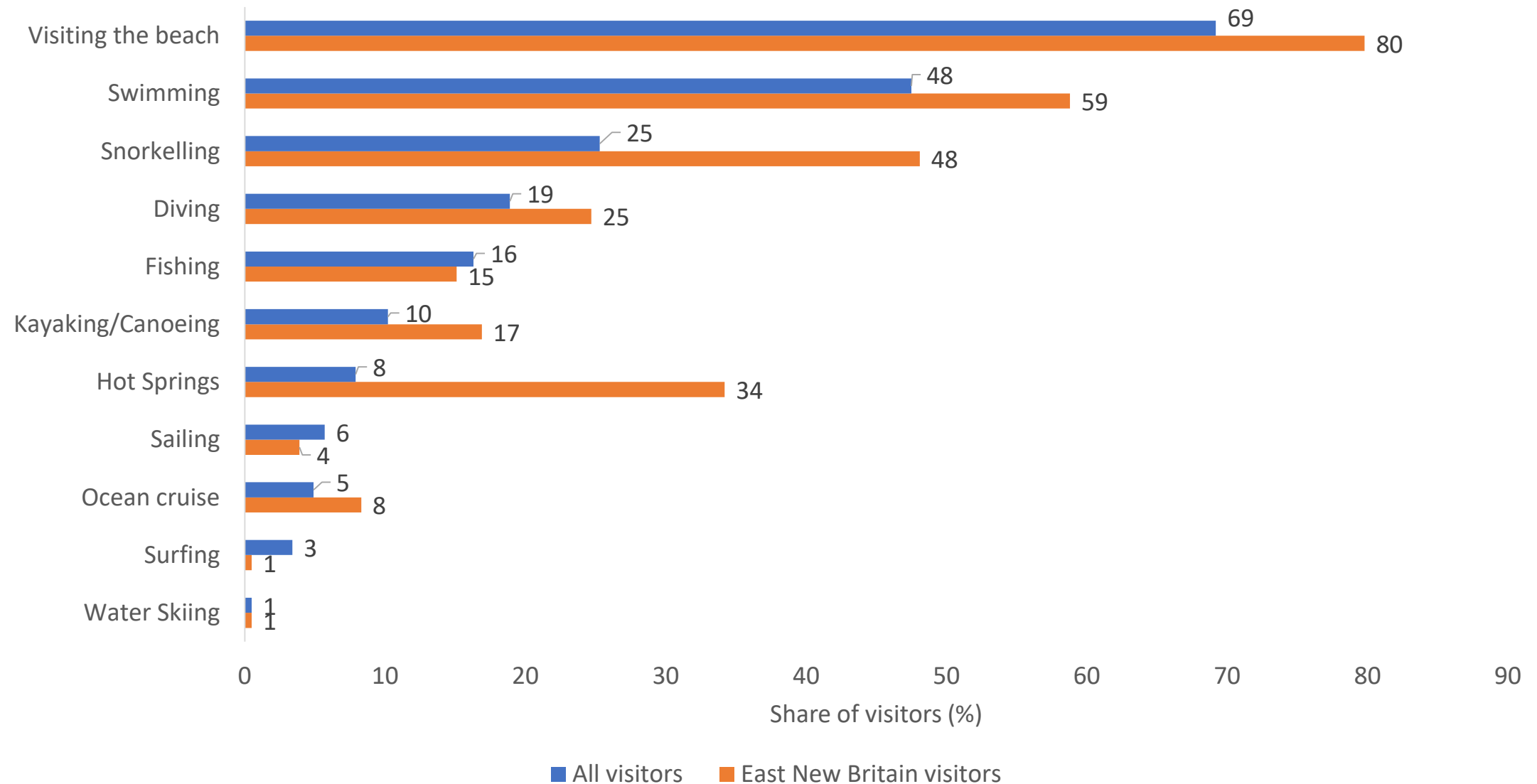
Participation in Land Based Activities – All Visitors vs Milne Bay Province Visitors

81



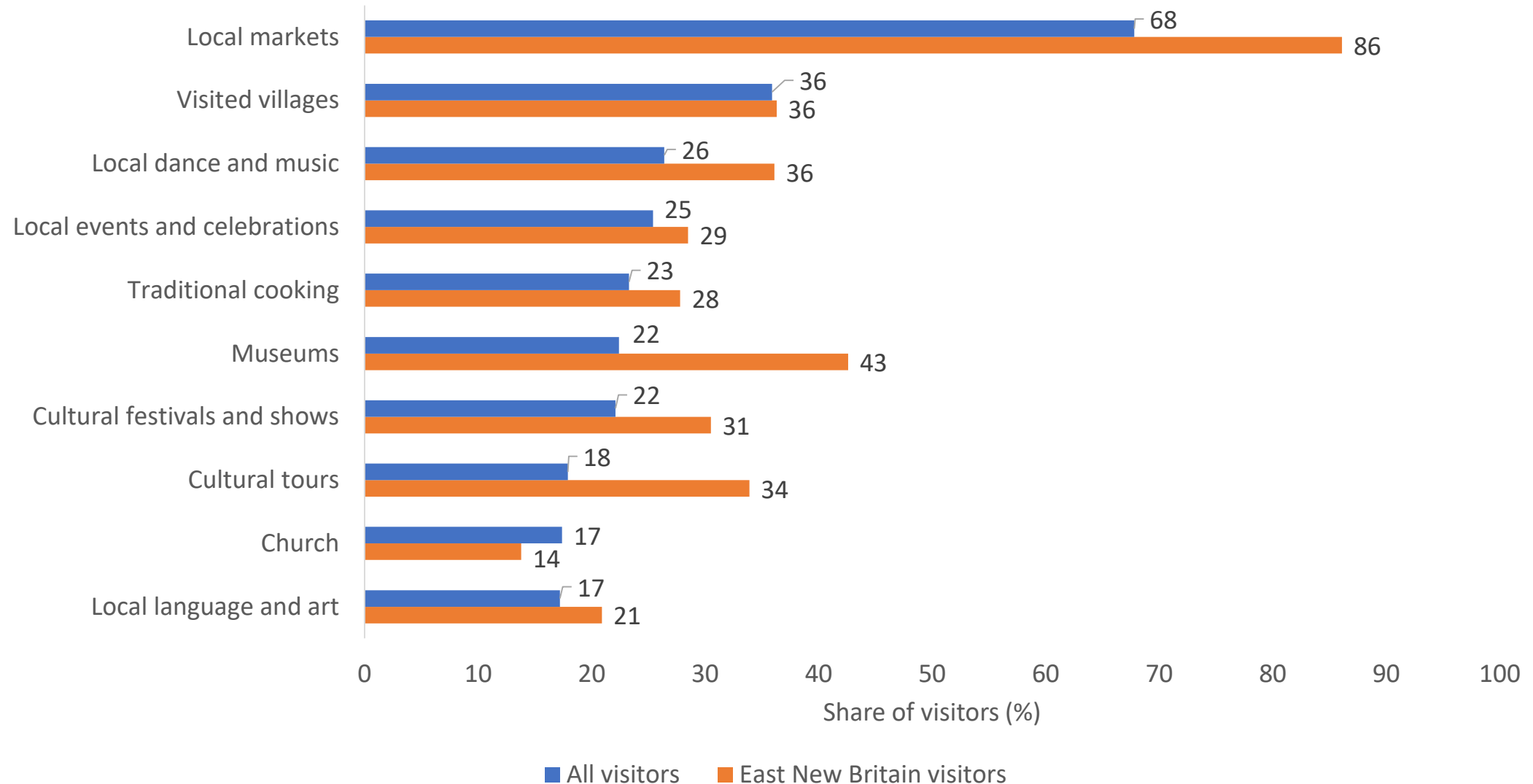
Participation in Water Based Activities – All Visitors vs East New Britain Visitors

82



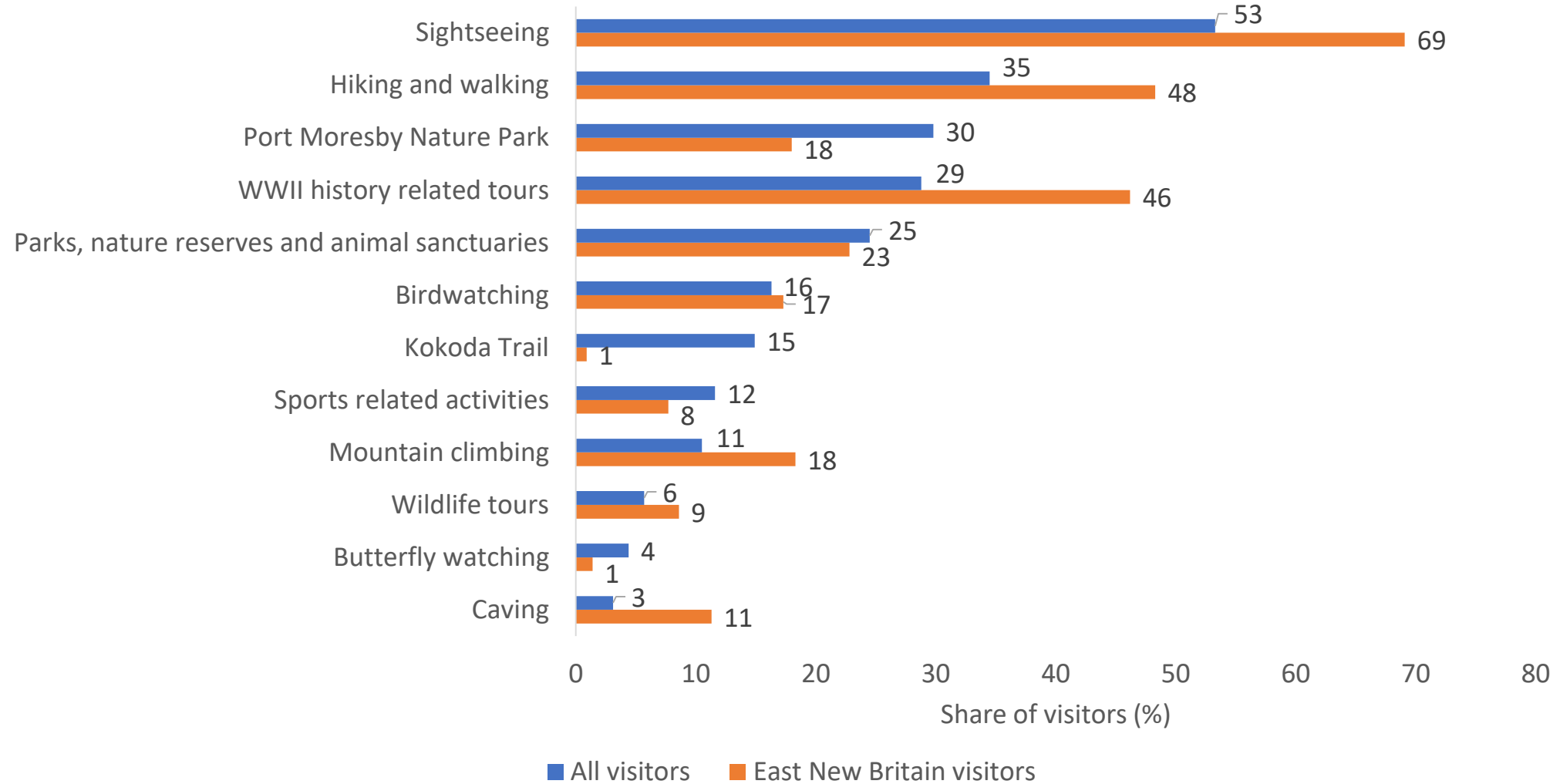
Participation in Cultural Based Activities – All Visitors vs East New Britain Visitors

83



Participation in Land Based Activities – All Visitors vs East New Britain Visitors

84



Thank You



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.

