

# 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

## 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

## 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

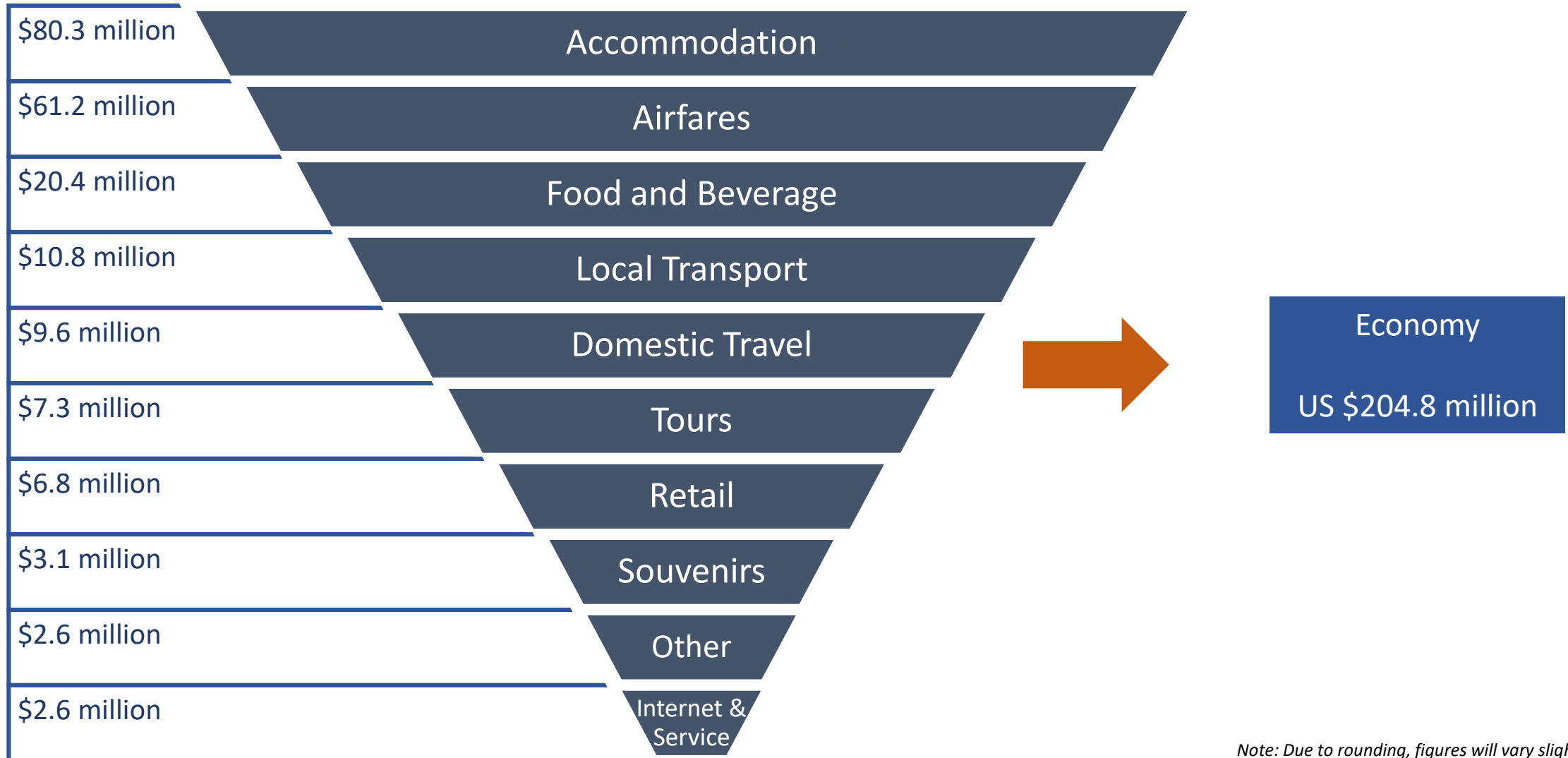
## Decision Making

- 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



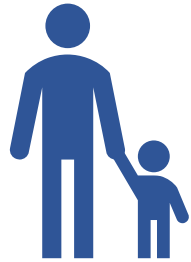
*Note: Due to rounding, figures will vary slightly. Spend figures are in USD*

# Presentation Structure





# Visitor Characteristics – IVS Respondent Data



## Responses

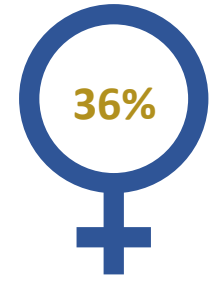
**2132** Number of respondents



## Household Income (USD)

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

## Gender



Females



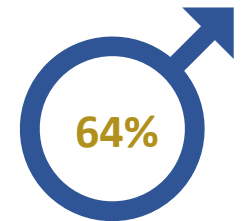
## Age

- 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

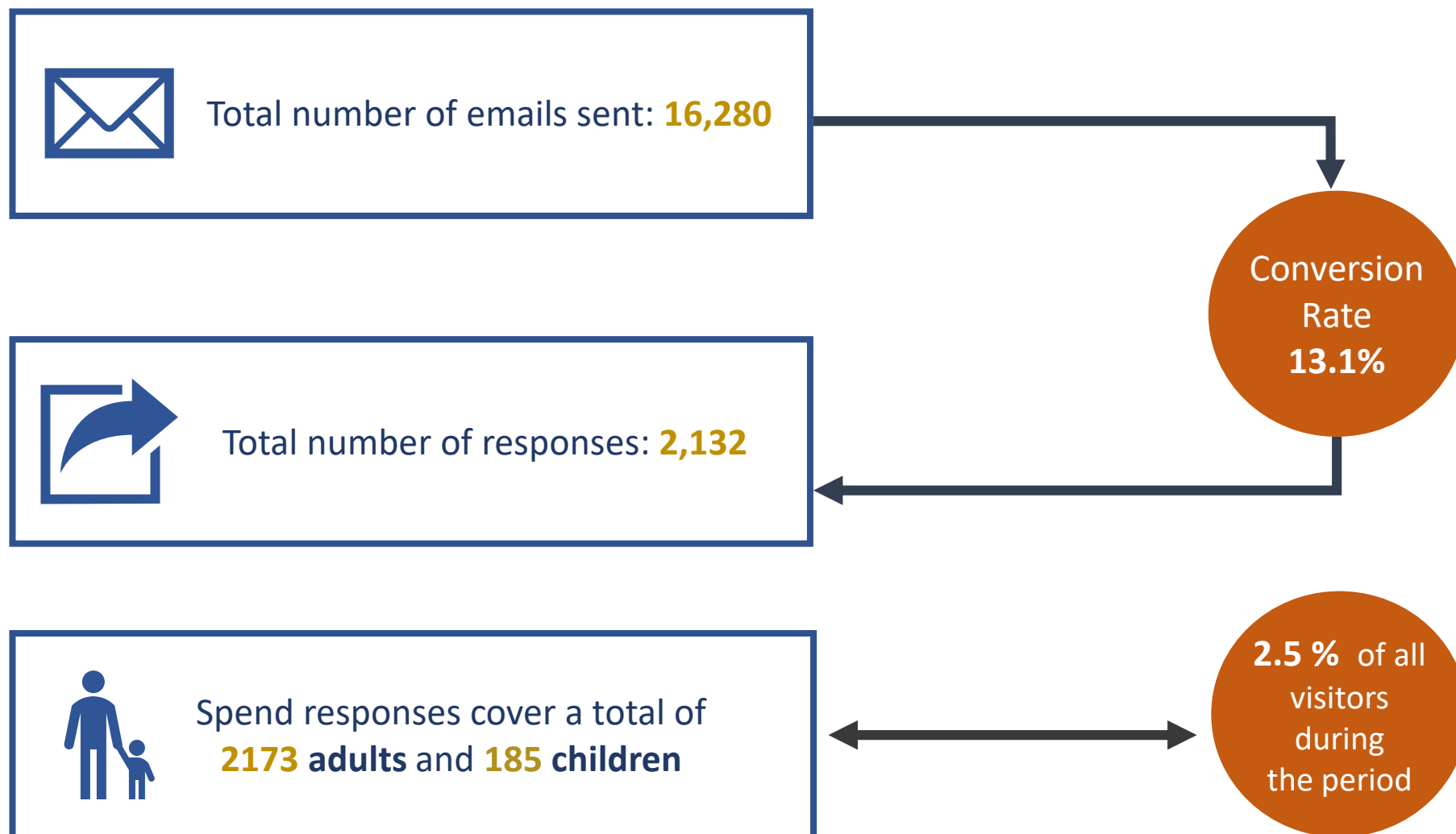
- 54%** Australia
- 12%** Asia
- 10%** North America
- 9%** New Zealand
- 7%** Europe
- 7%** Pacific
- 0.4%** Other



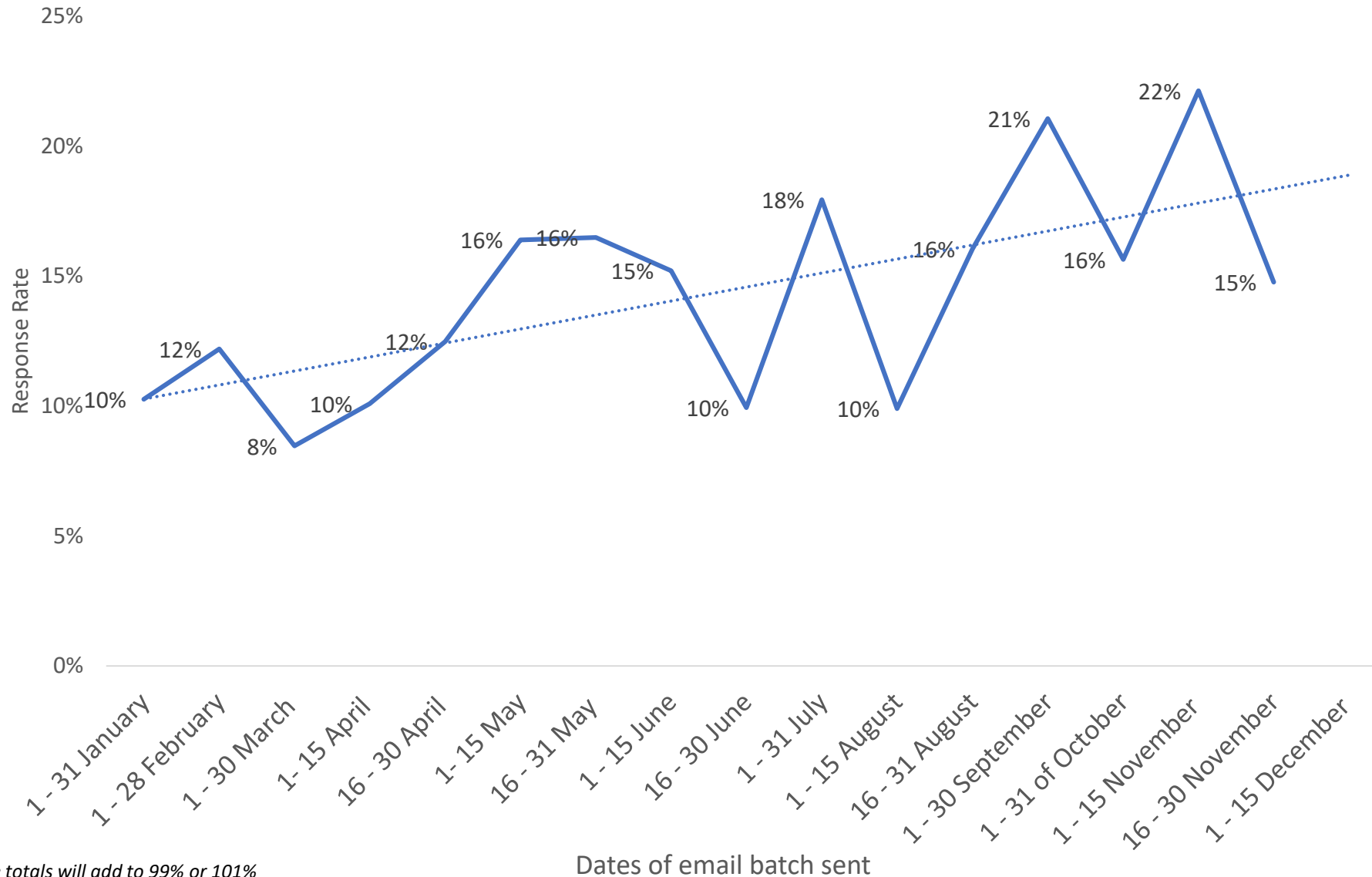
Males

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

# Respondents

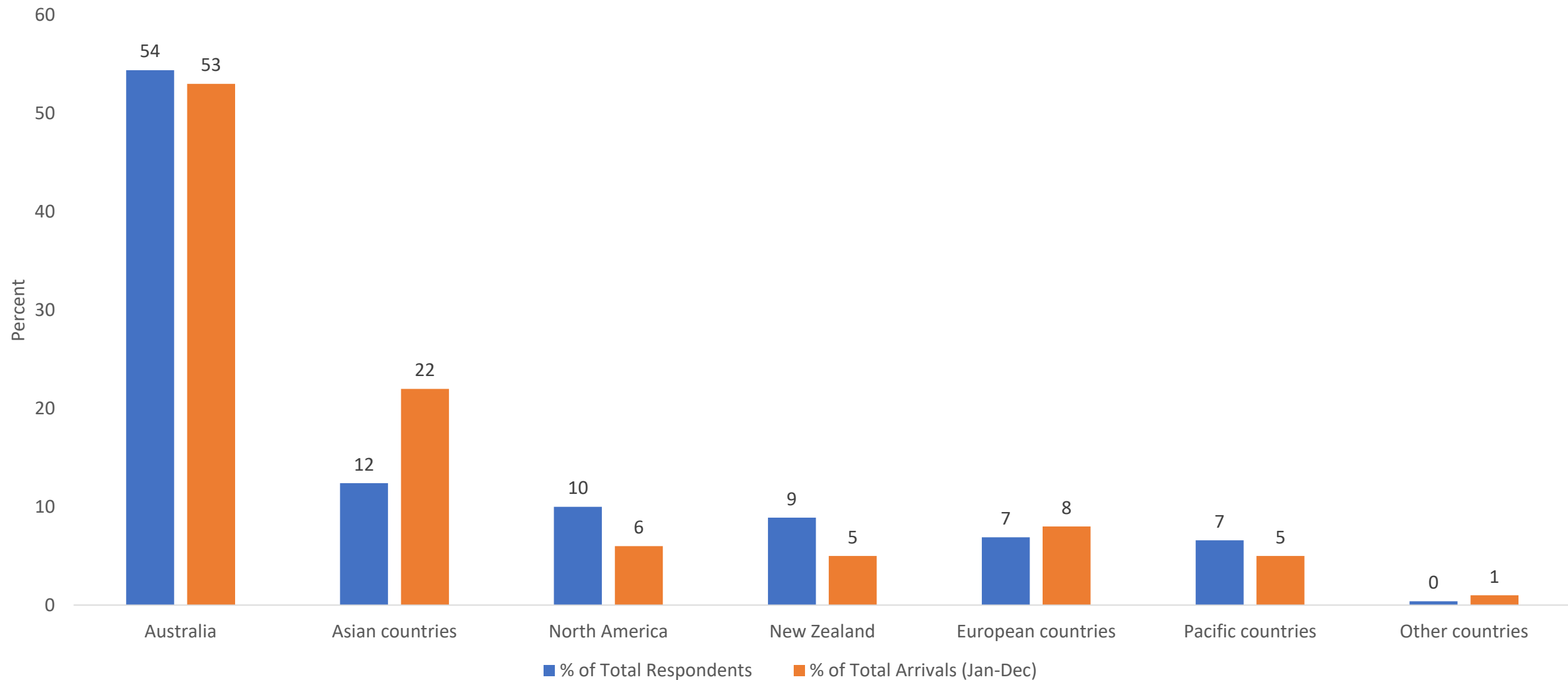


# IVS Response Rate Data

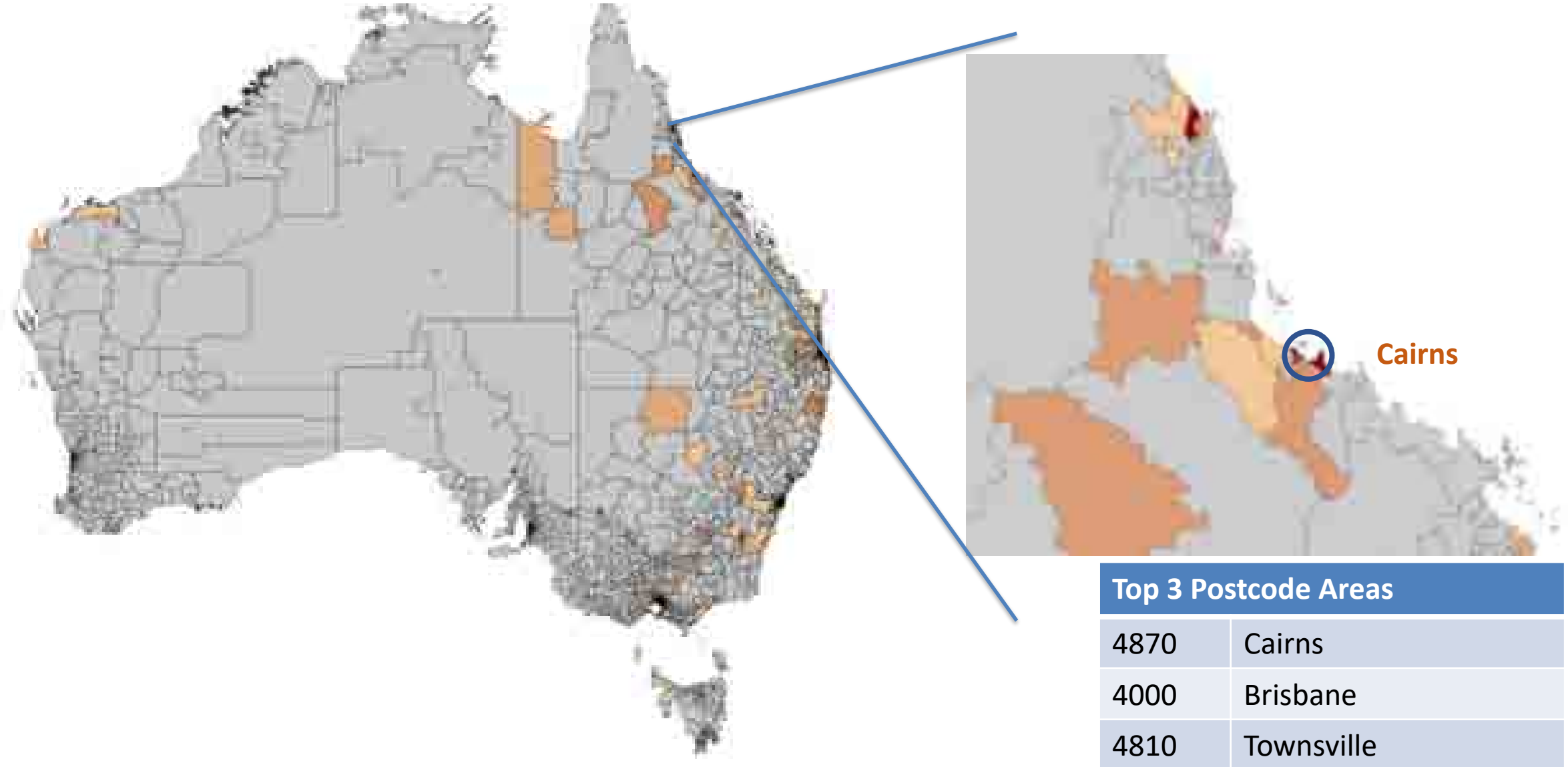


Note: Due to rounding some totals will add to 99% or 101%

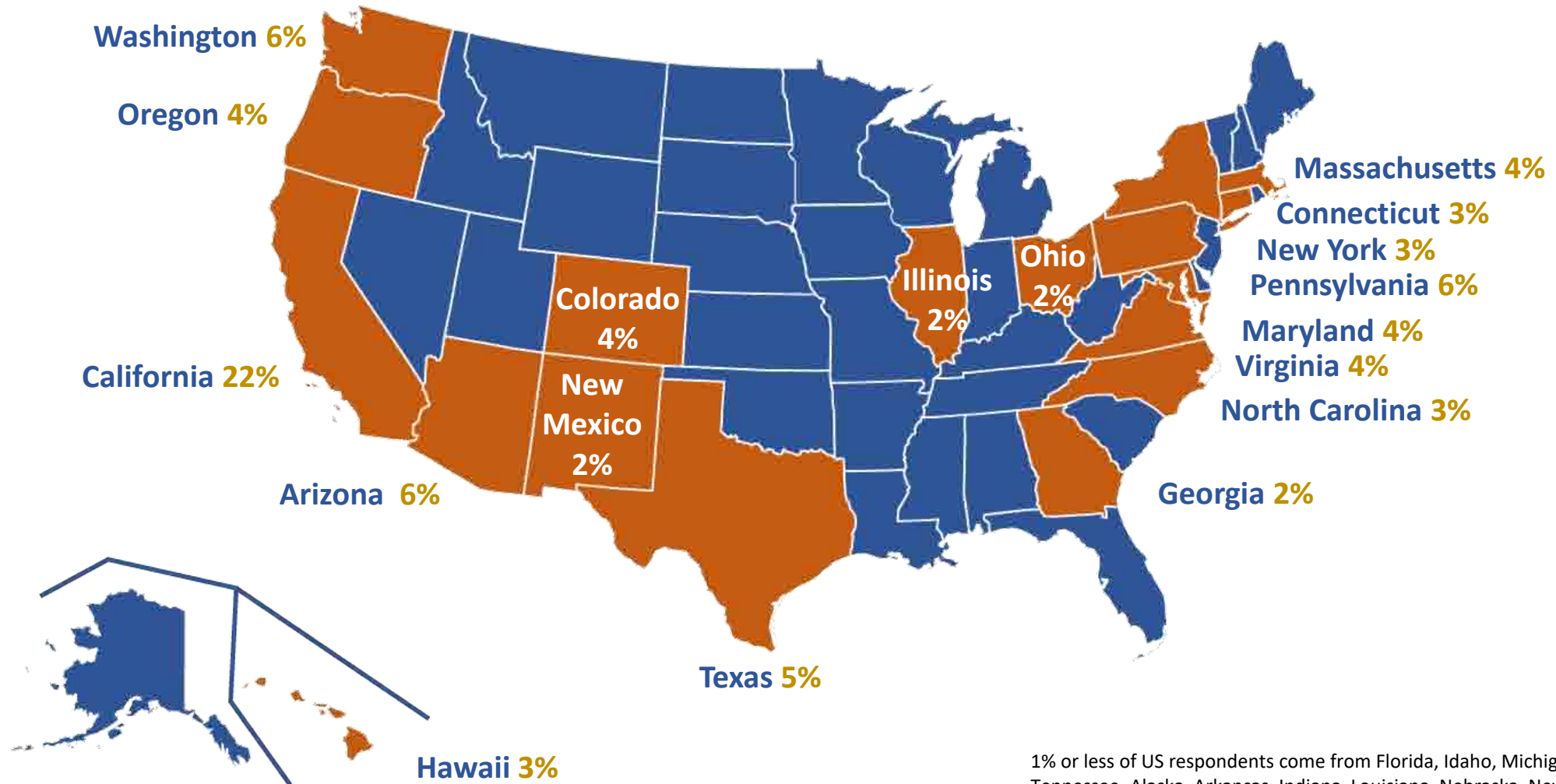
# Country of Origin



# Australian Respondents – IVS Postcode Respondent Data



# US Respondents – IVS Respondent Data



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



## 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



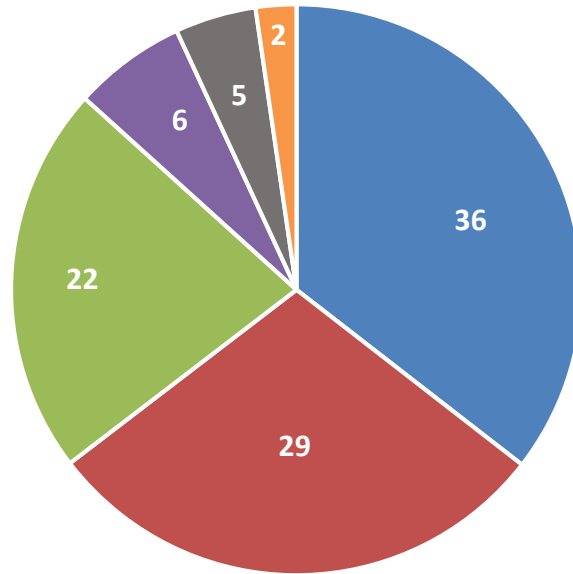
## Regions Visited on Trip

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



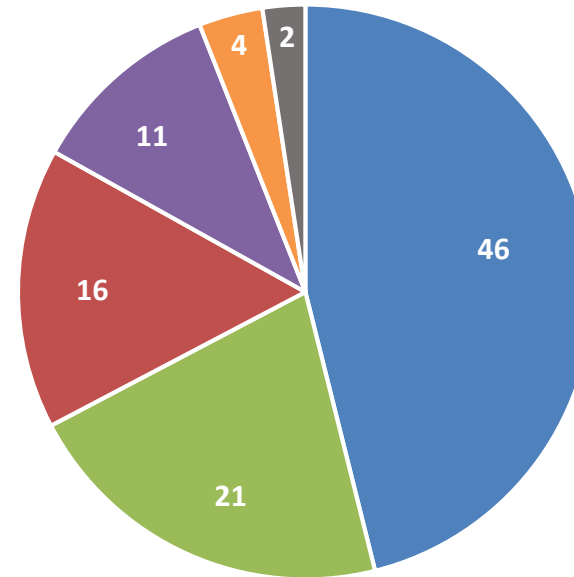
# Main Purpose of Visit – Australia and New Zealand

## Australia



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

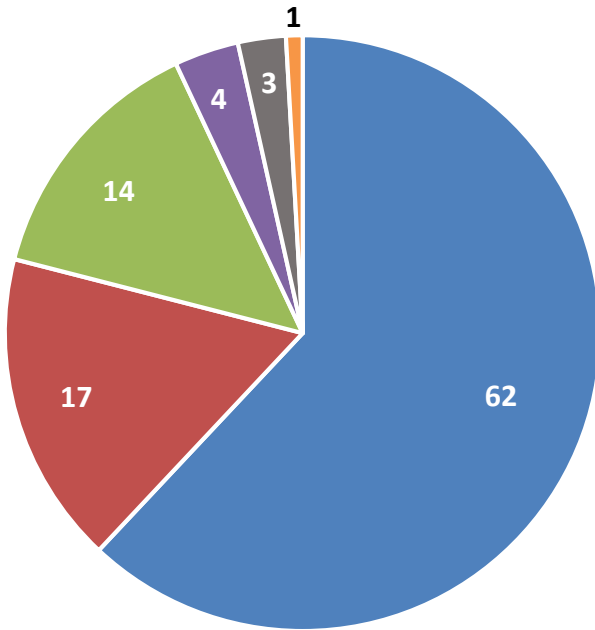
## New Zealand



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

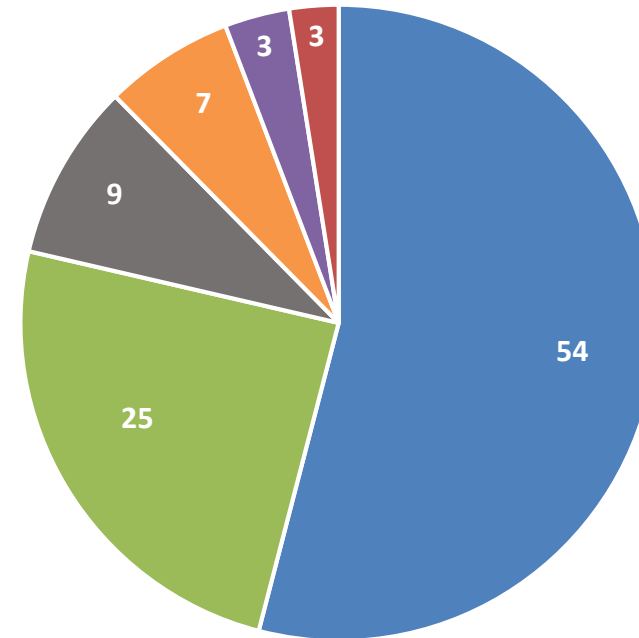
# Main Purpose of Visit – Asia and Pacific

## Asia



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

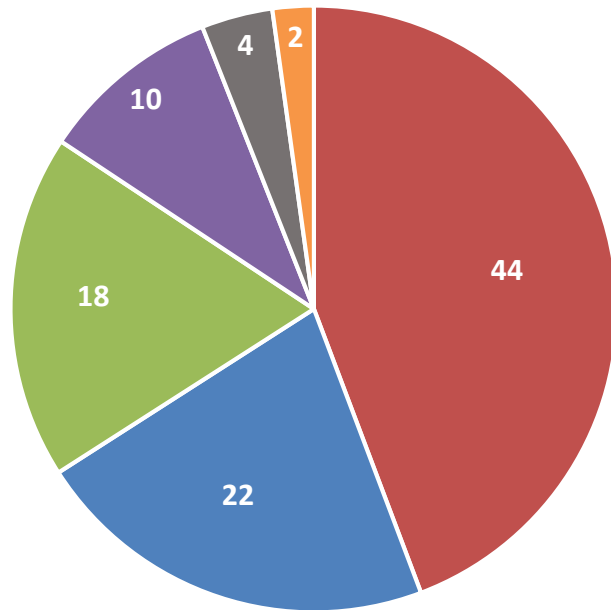
## Pacific



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

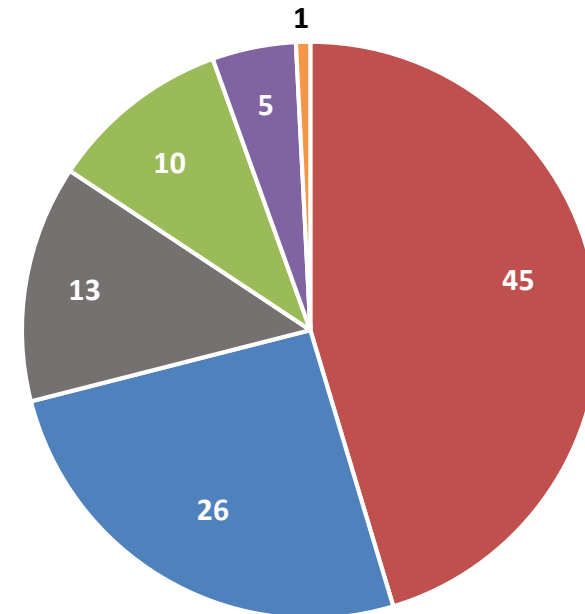
# Main Purpose of Visit – North America and Europe

## North America



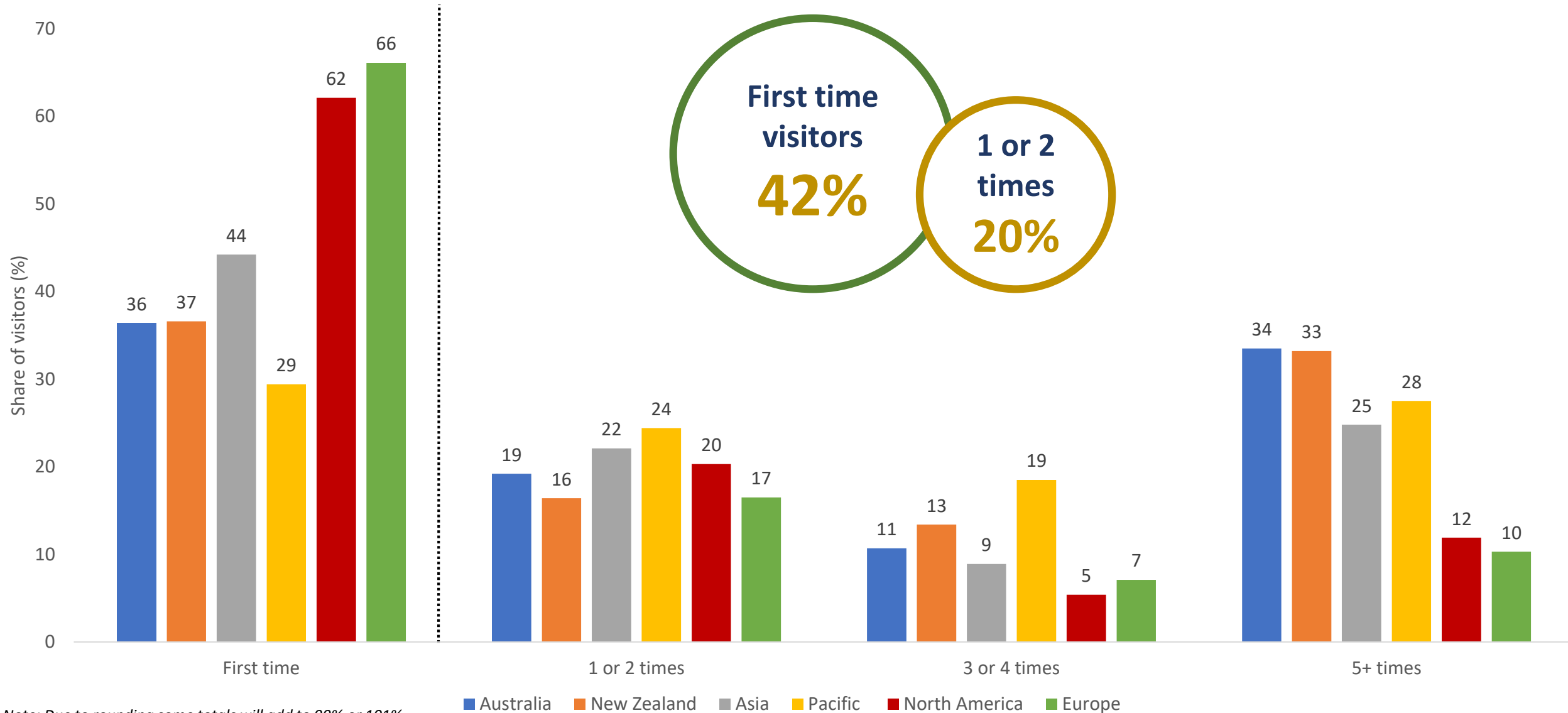
■ Holiday ■ Business ■ VFR ■ Volunteering ■ Other ■ Education

## Europe



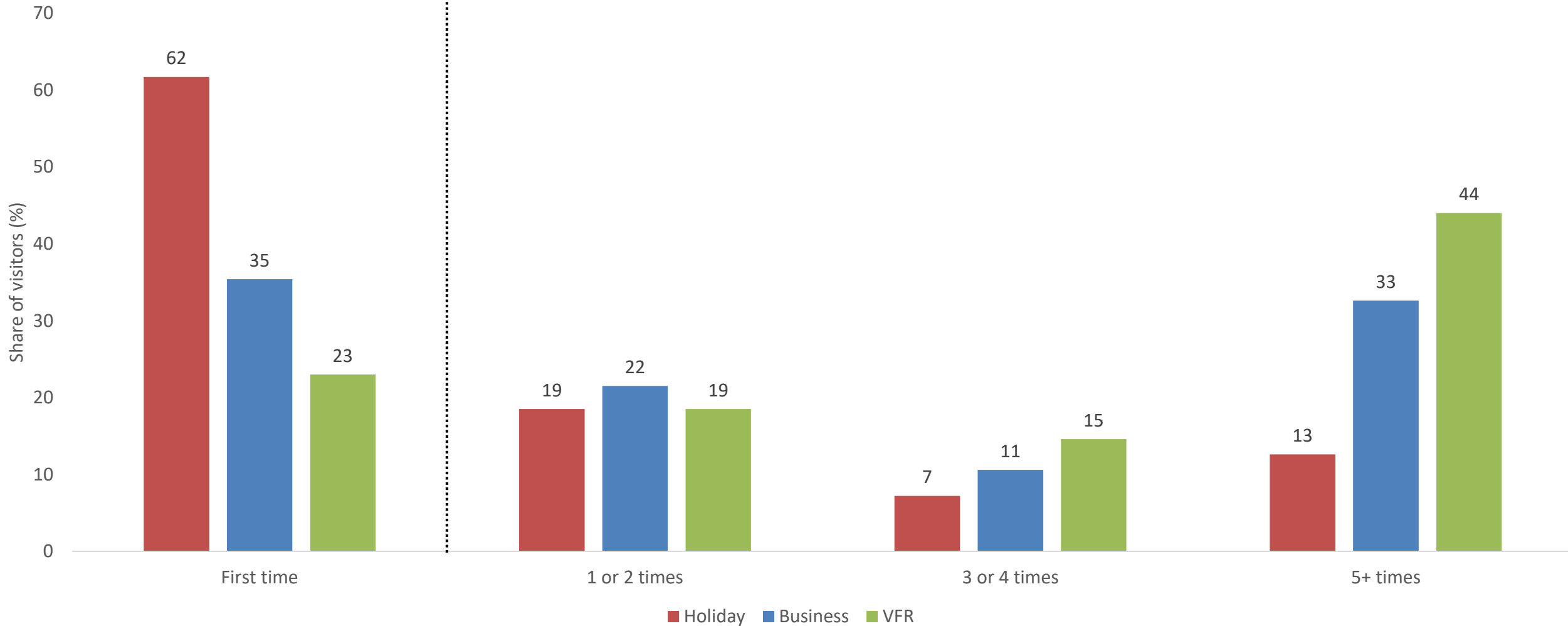
■ Holiday ■ Business ■ Other ■ VFR ■ Volunteering ■ Education

# Previous visits – Country/Region Market



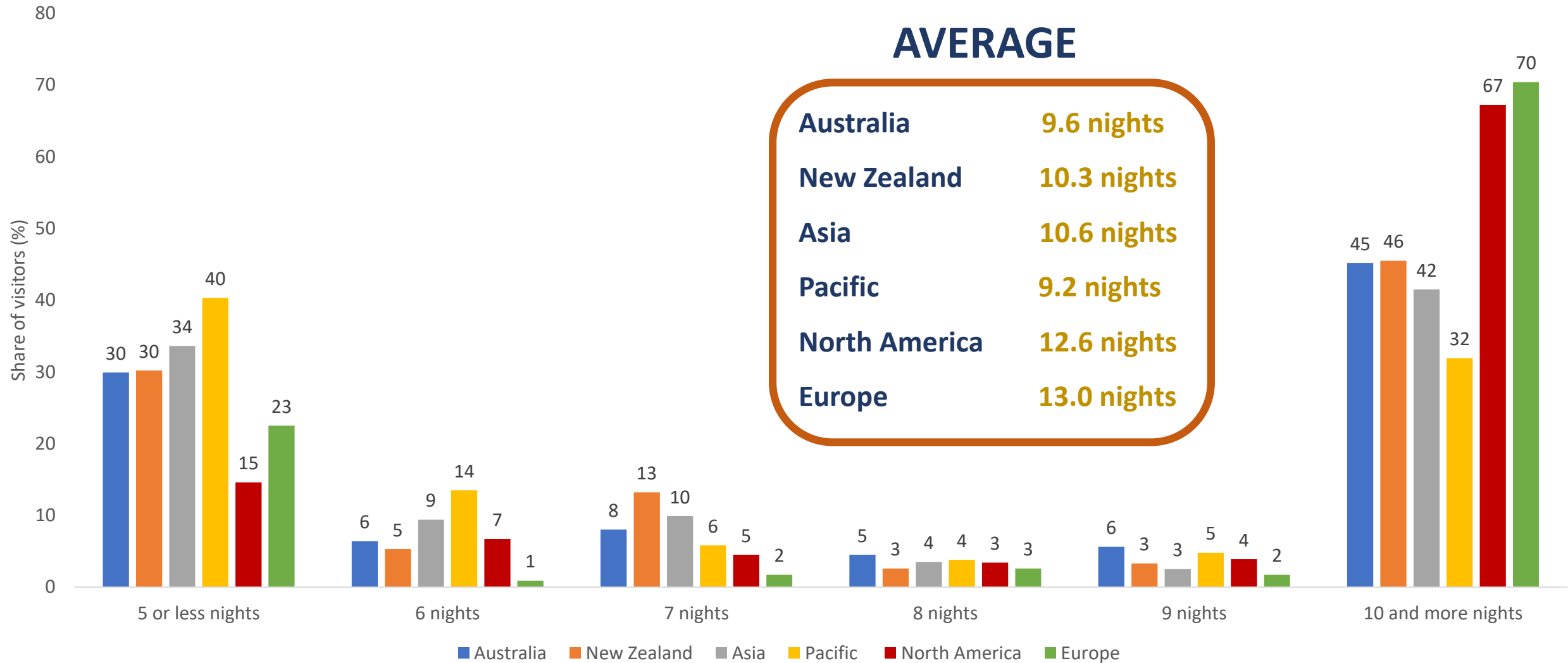
Note: Due to rounding some totals will add to 99% or 101%

# Previous Visits – Purpose of Visit



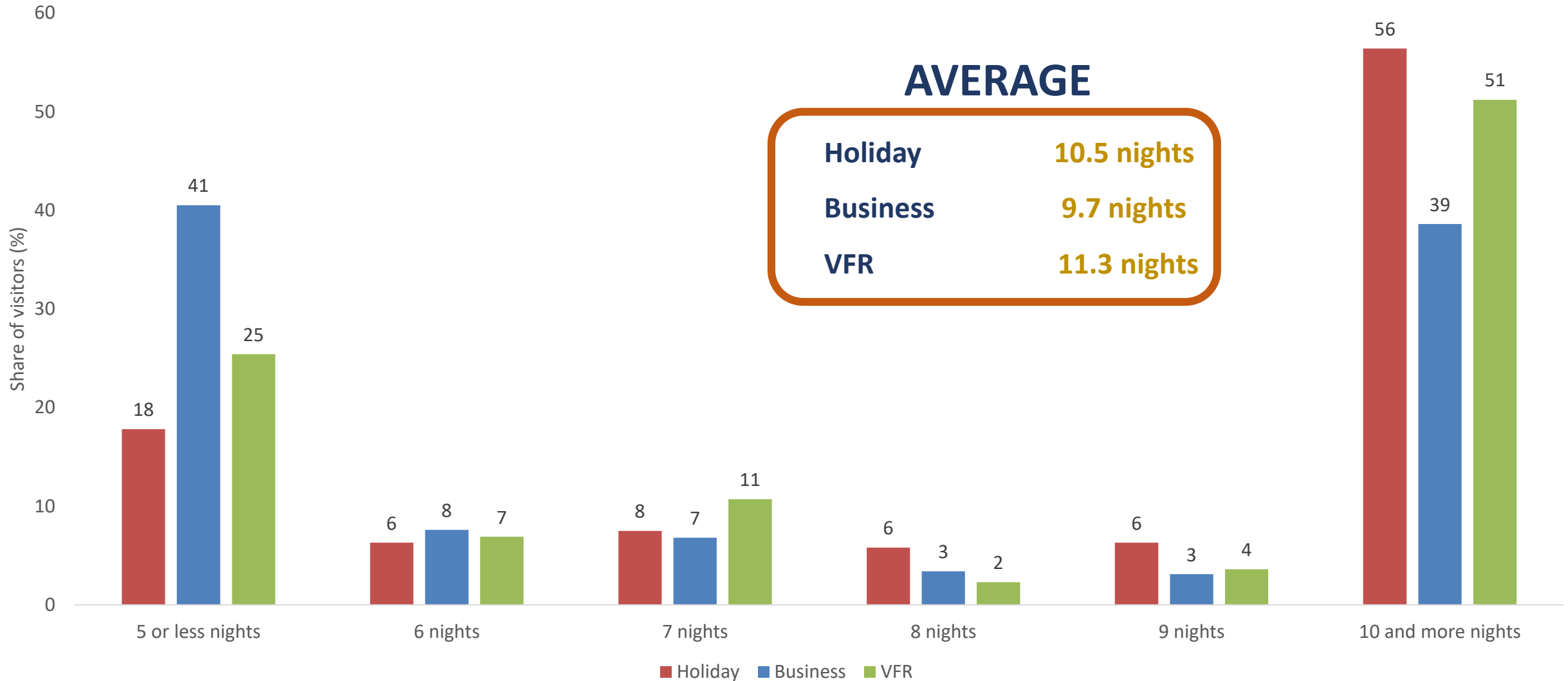
Note: Due to rounding some totals will add to 99% or 101%

# 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%

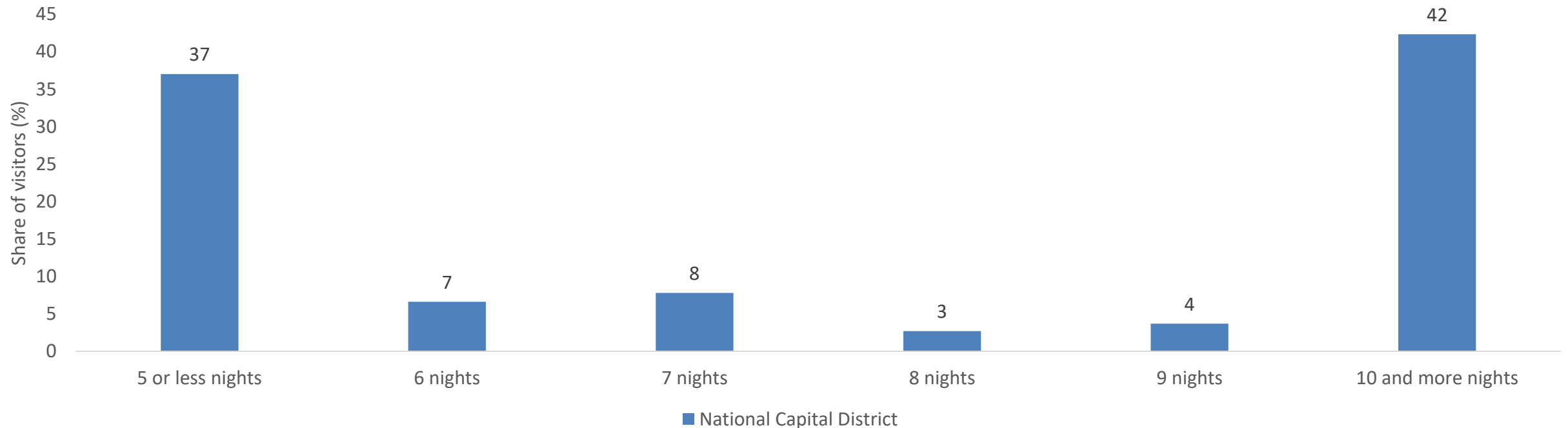
# Average Length of Stay (ALoS) – NCD Visitors in PNG and Province Visited

## NCD Visitors ALoS in PNG

**National Capital District** 9.5 nights

## NCD Visitors ALoS in NCD

**National Capital District** 6.9 nights





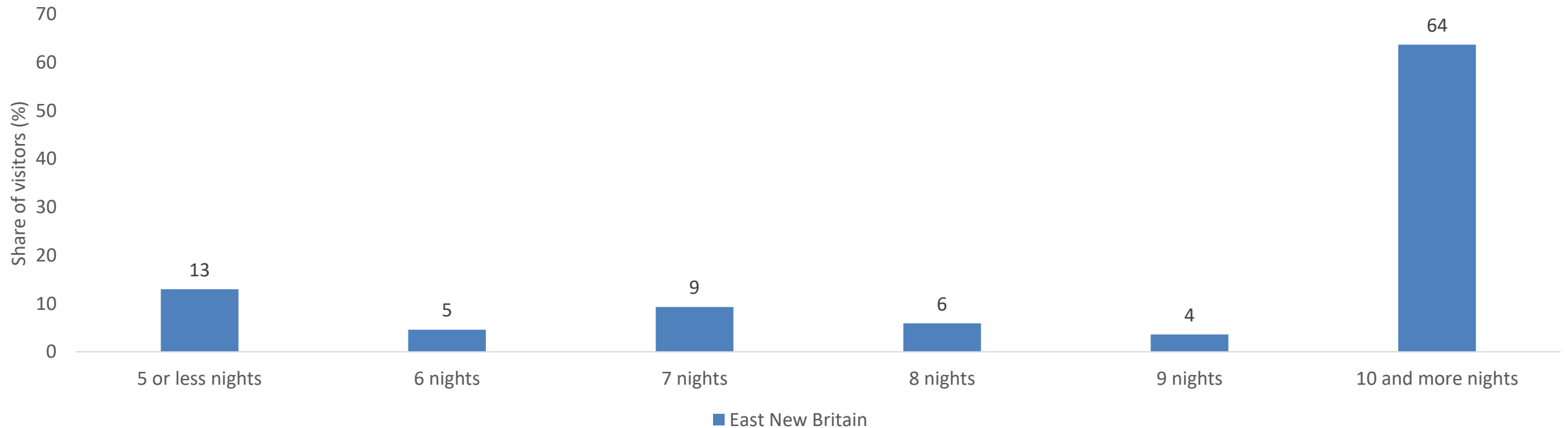
# Average Length of Stay (ALoS) – ENB Visitors in PNG and Province Visited

## 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

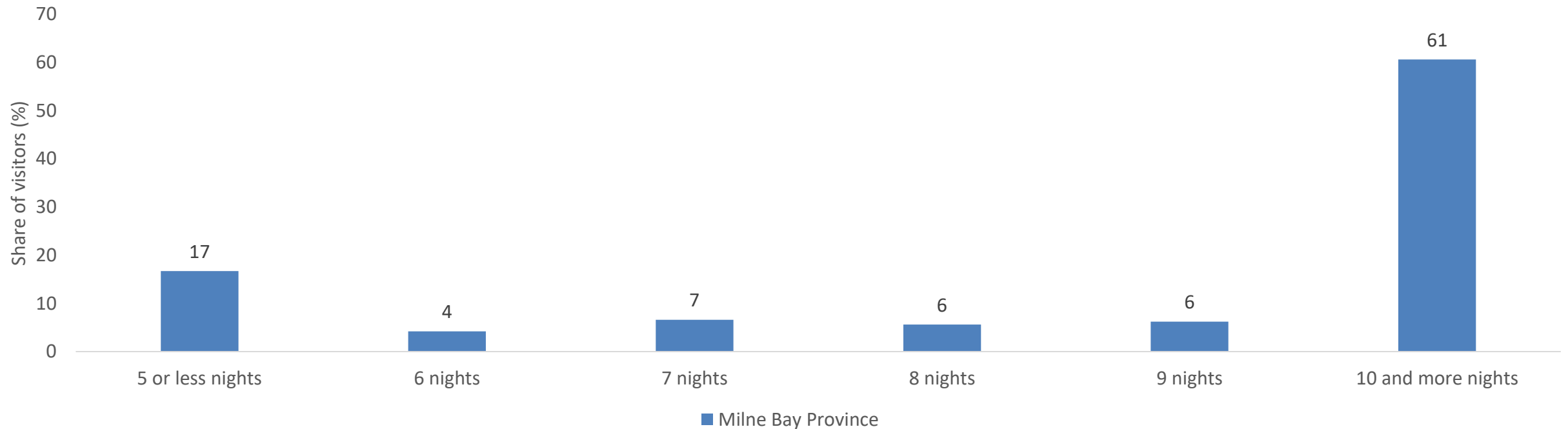
Milne Bay Province

12.3 nights

## MB Visitors ALoS in MB

Milne Bay Province

8.5 nights



# Airlines Used for Travel – Country/Region Market



**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



**6% Total  
Visitors**

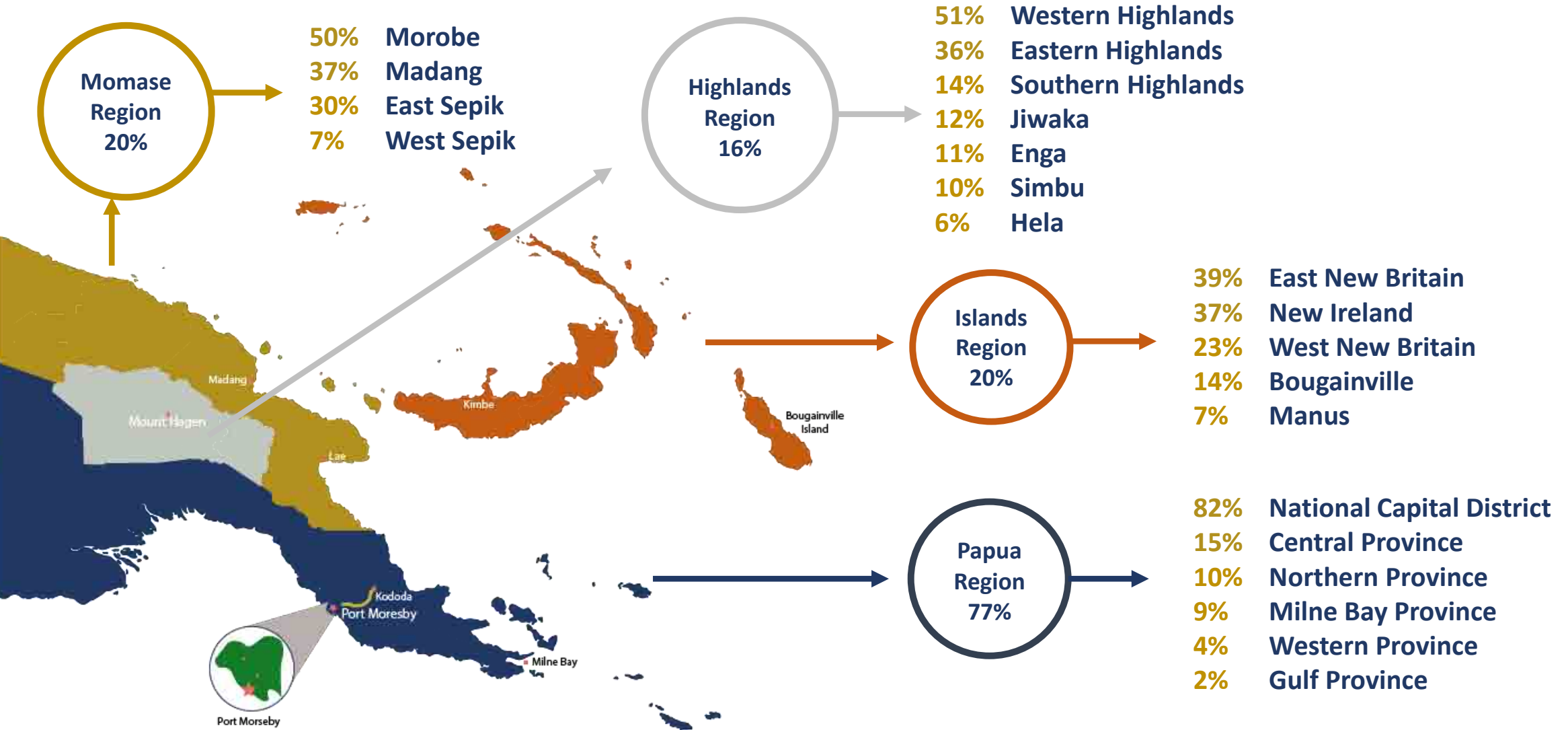
- 0% Australia
- 0% New Zealand
- 18% Asia
- 2% Pacific
- 12% North America
- 12% Europe



**2% Total  
Visitors**

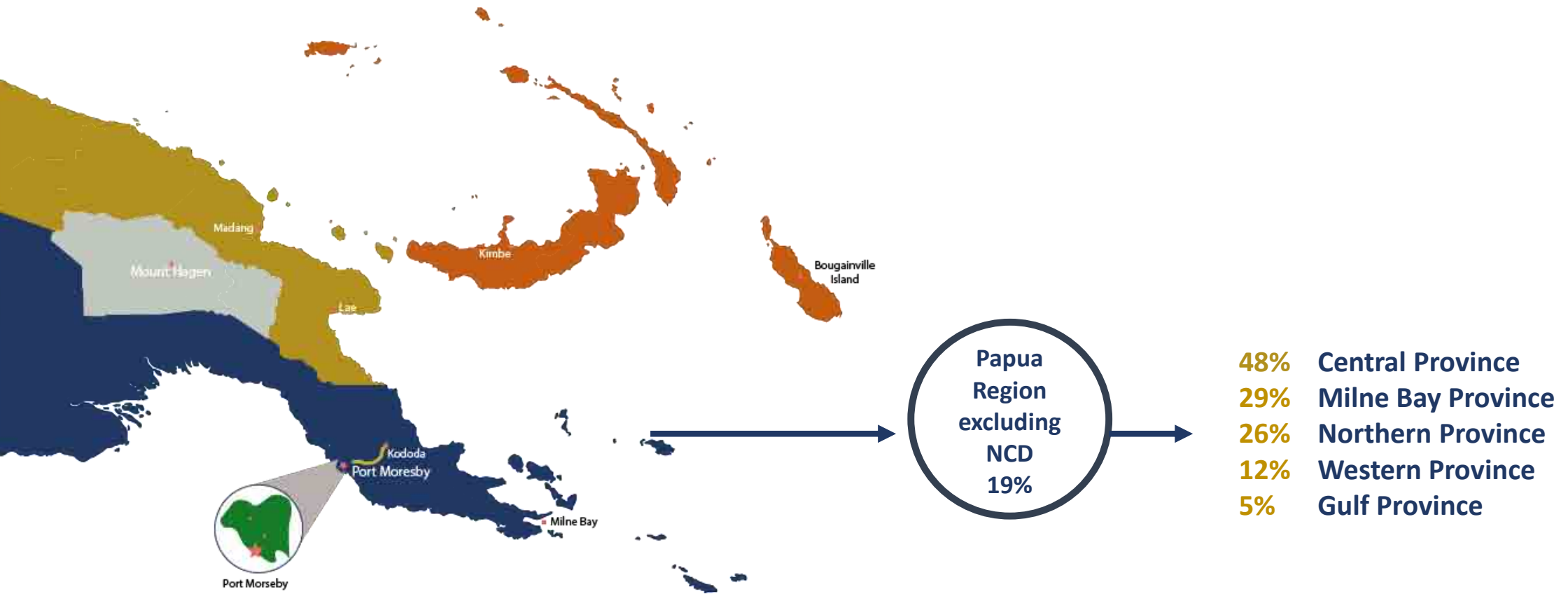
- 2% Australia
- 3% New Zealand
- 1% Asia
- 1% Pacific
- 5% North America
- 4% Europe

# Regions Visited – All Visitors



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

# Regions Visited – Papua Region excluding the NCD



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

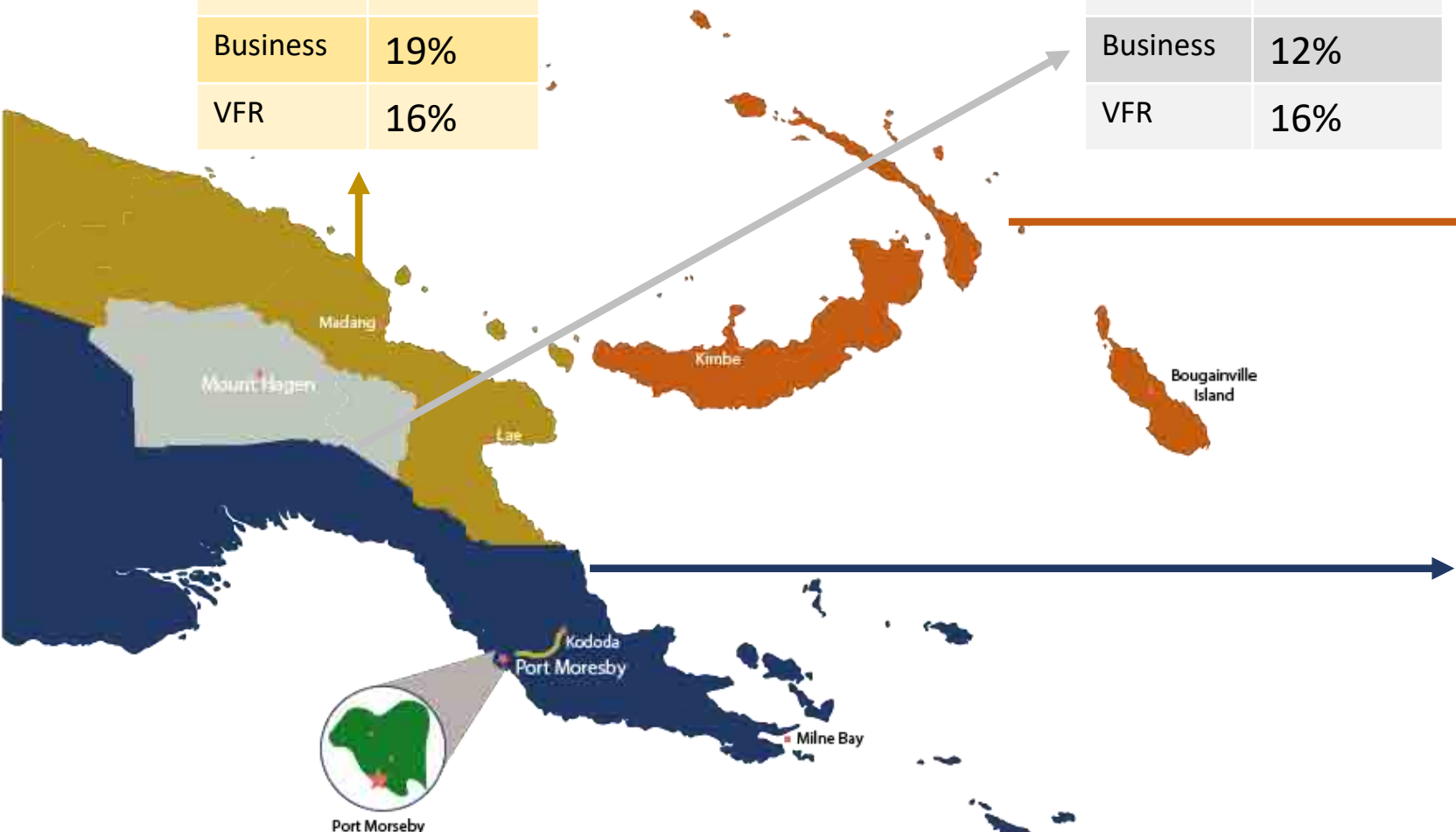
# Percentage of All Visitors to Each Region by Purpose of Visit

Momase Region	
Holiday	24%
Business	19%
VFR	16%

Highlands Region	
Holiday	22%
Business	12%
VFR	16%

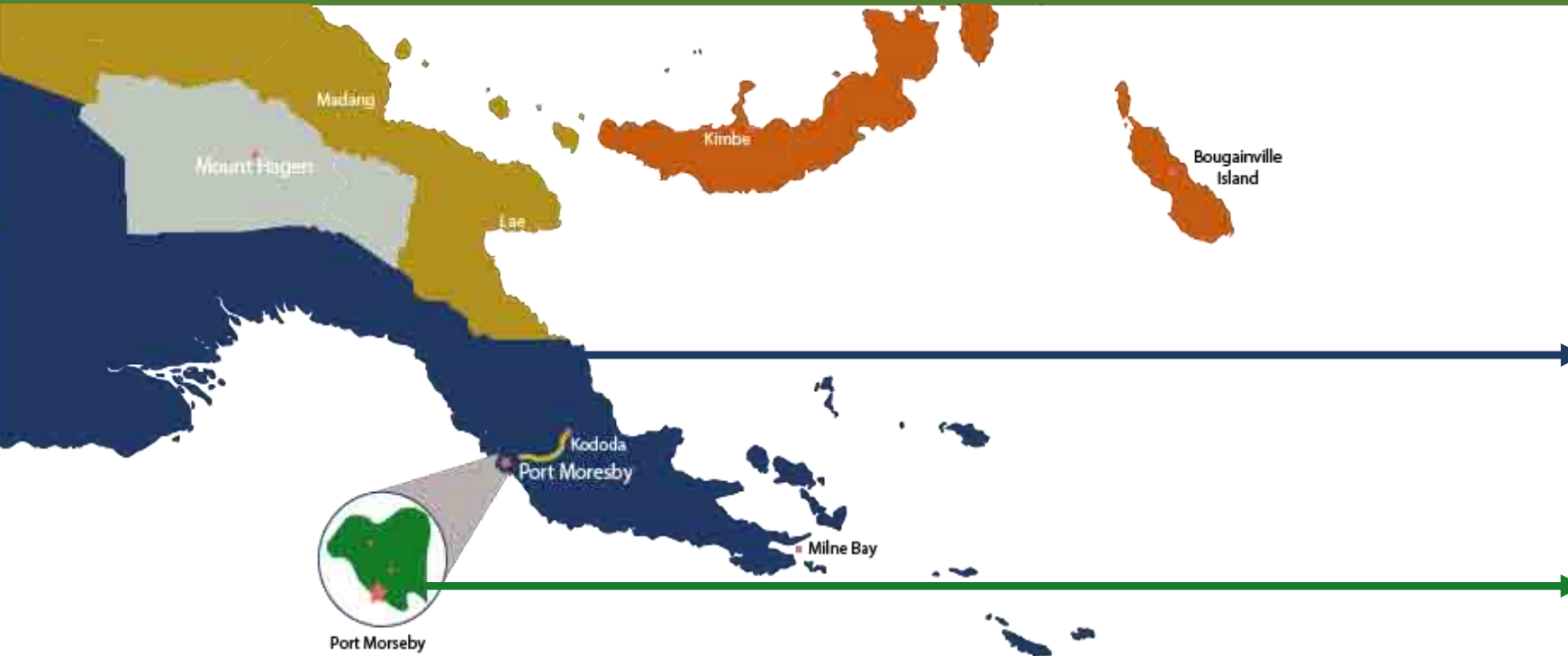
Islands Region	
Holiday	30%
Business	15%
VFR	15%

Papua Region	
Holiday	69%
Business	81%
VFR	78%



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

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



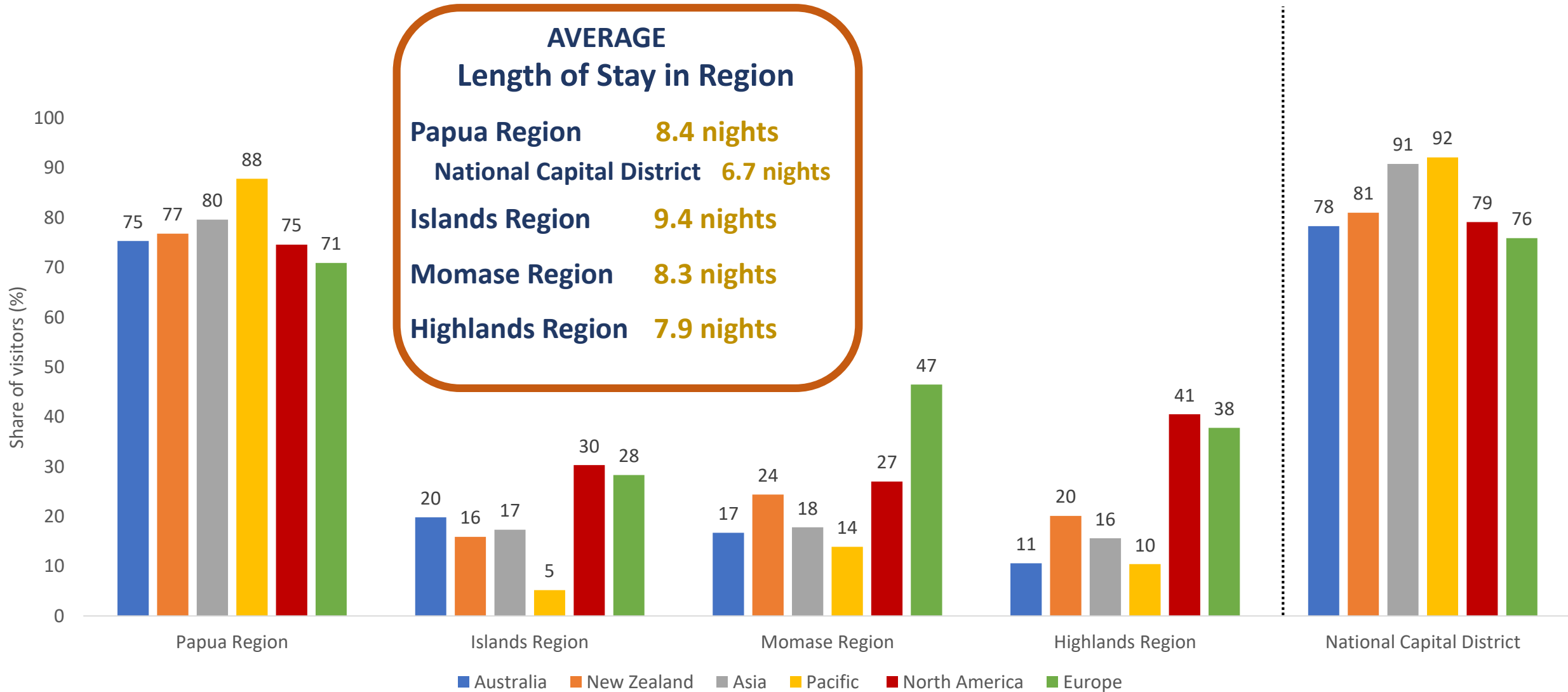
Papua Region Visitors Excluding NCD	
Holiday	71%
Business	73%
VFR	79%

National Capital District Visitors	
Holiday	62%
Business	75%
VFR	78%

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

\*: Papua Region visitors excludes visitors from the NCD

# Regions Visited – Country



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



# Detailed Information on NCD Visitors

## 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

\*Note: Based on IVS data and not official statistics

# Detailed Information on MB Visitors

## 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

\*Note: Based on IVS data and not official statistics

# Detailed Information ENB Visitors

## 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



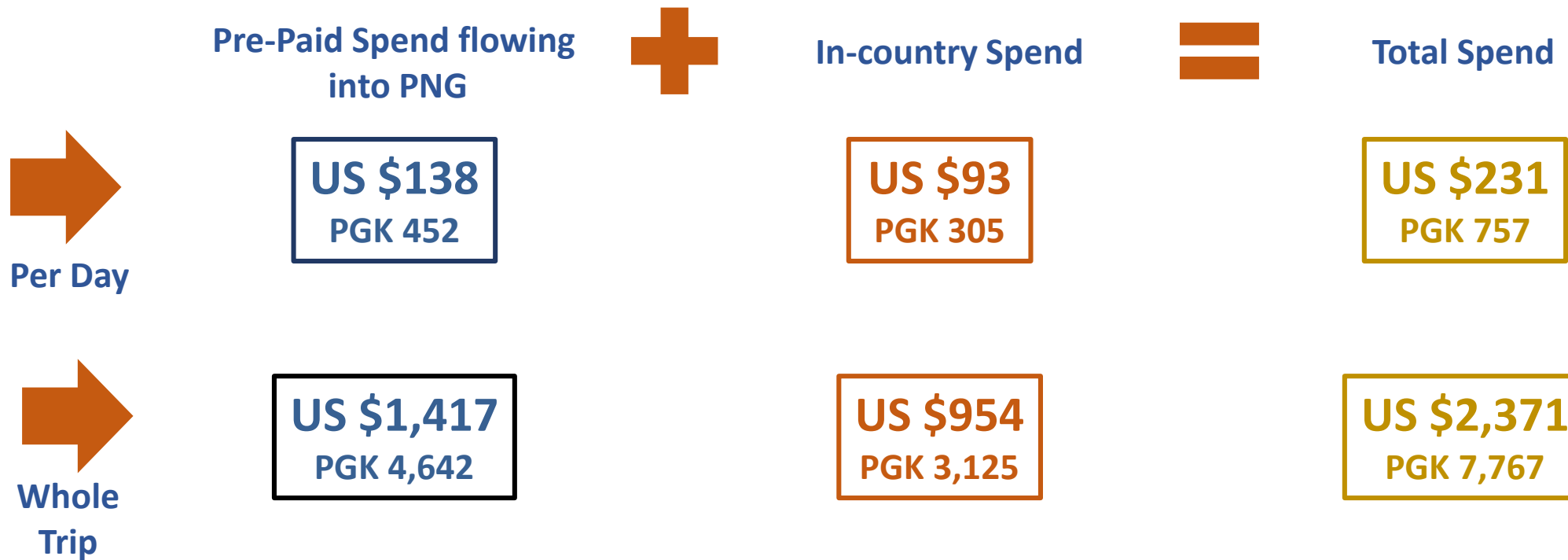
- 49%** Australia
- 15%** North America
- 14%** Europe
- 11%** Asia
- 7%** New Zealand
- 2%** Other
- 1%** Pacific

\*Note: Based on IVS data and not official statistics

# Presentation Structure

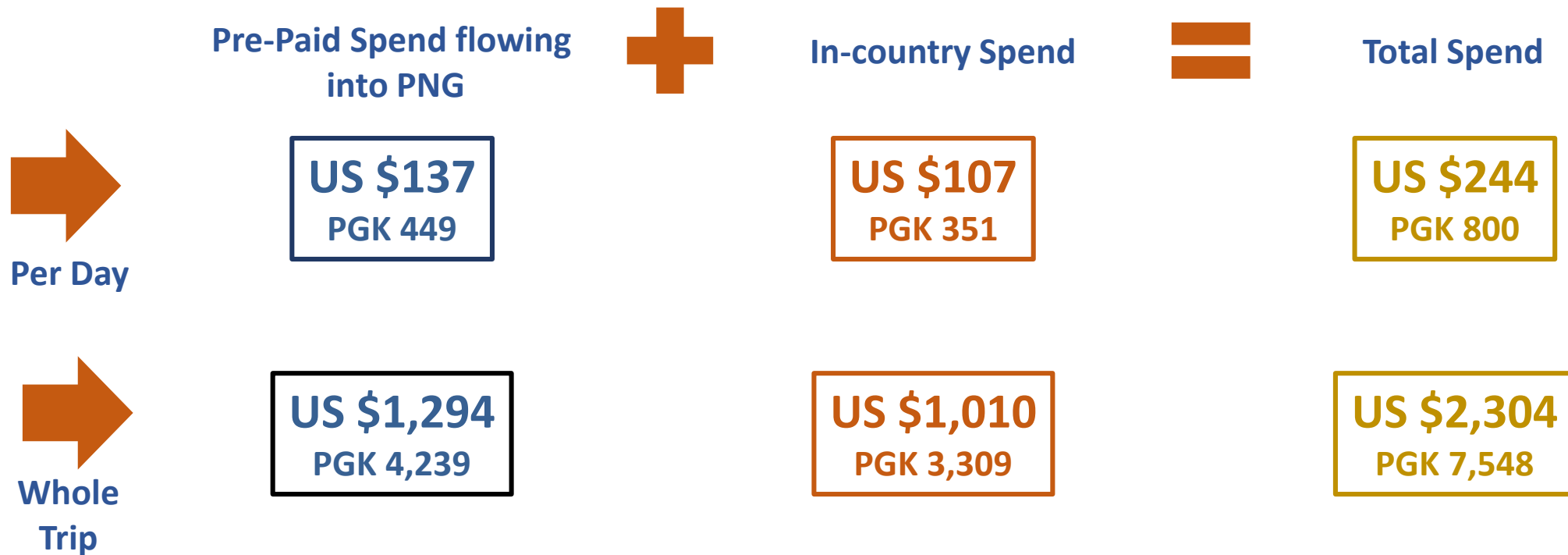


# Visitor Expenditure – Per Person and Total

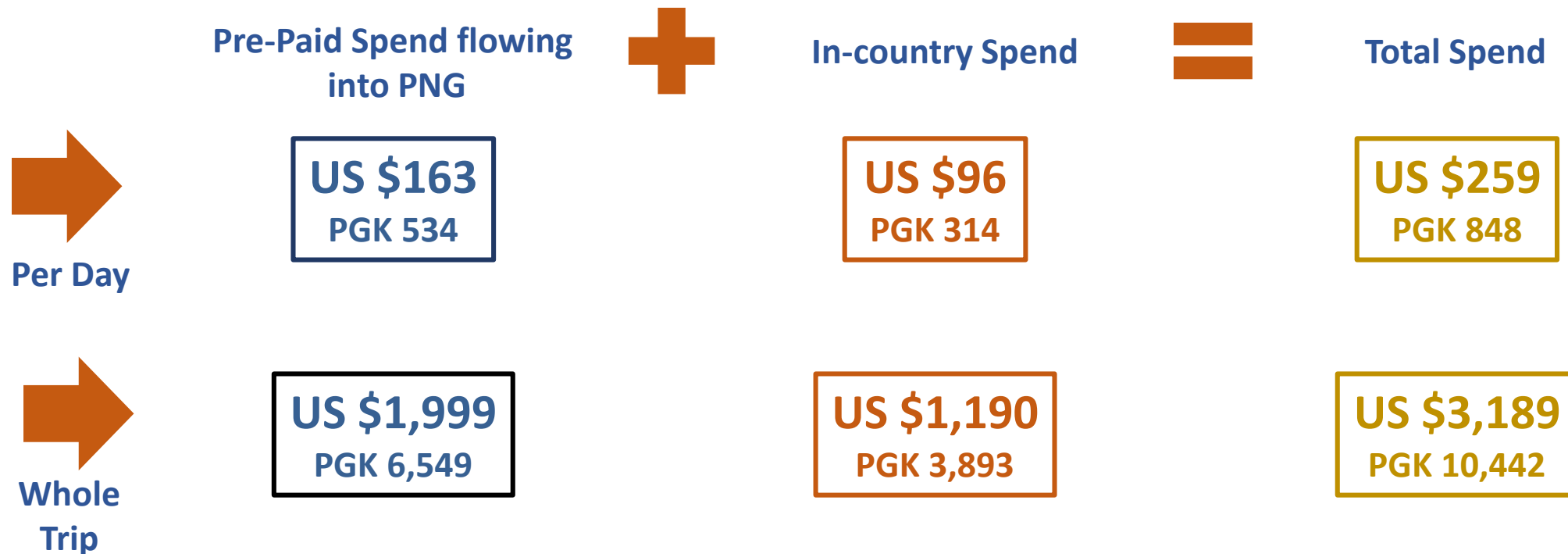


**Direct economic impact on PNG for Jan - Dec 2017**  
 US \$204.8 million / PGK 670.9 million in total

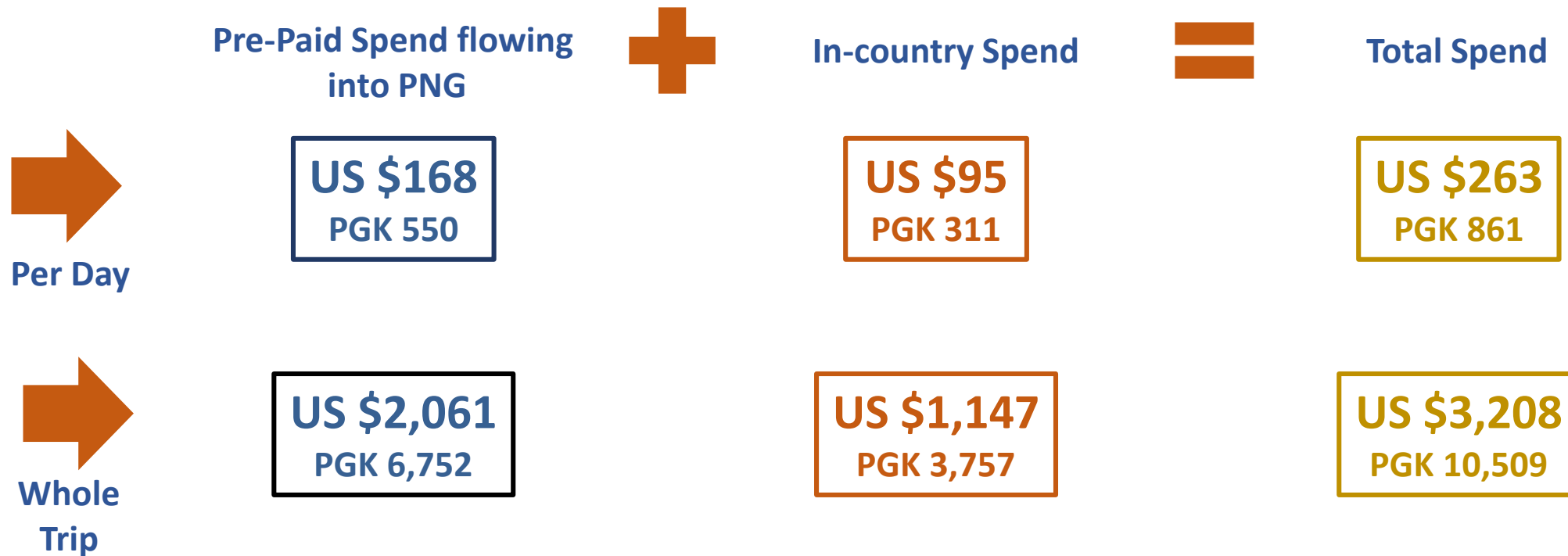
# National Capital District Visitor Expenditure – Per Person and Total



# Milne Bay Province Visitor Expenditure – Per Person and Total



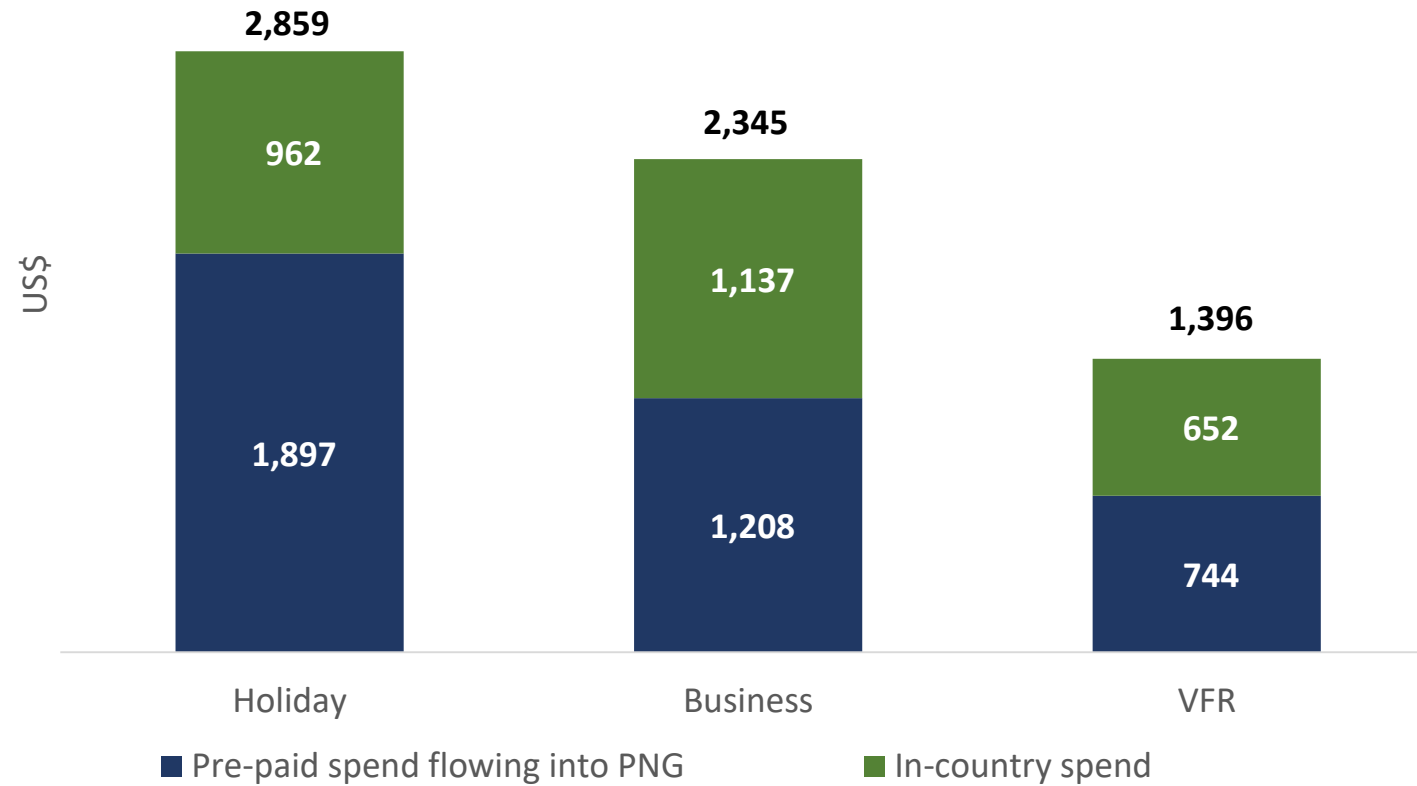
# East New Britain Visitor Expenditure – Per Person and Total



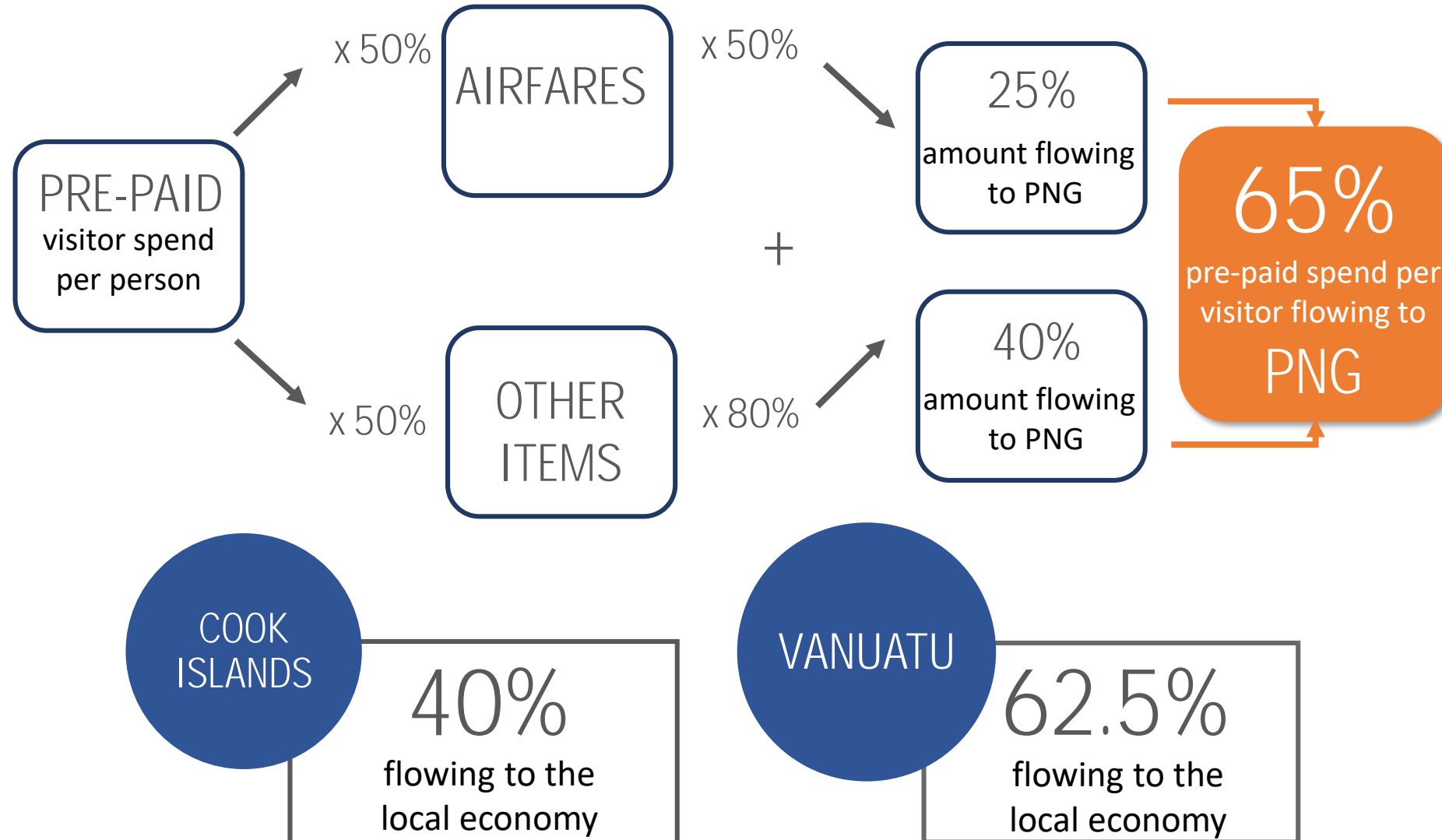


# Expenditure by Purpose of Visit USD

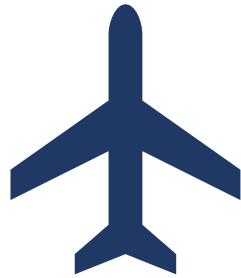
## Per Person Per Visit



# Prior to Arrival Visitor Expenditure



# Breakdown of Pre-Paid Spend



50%



40%



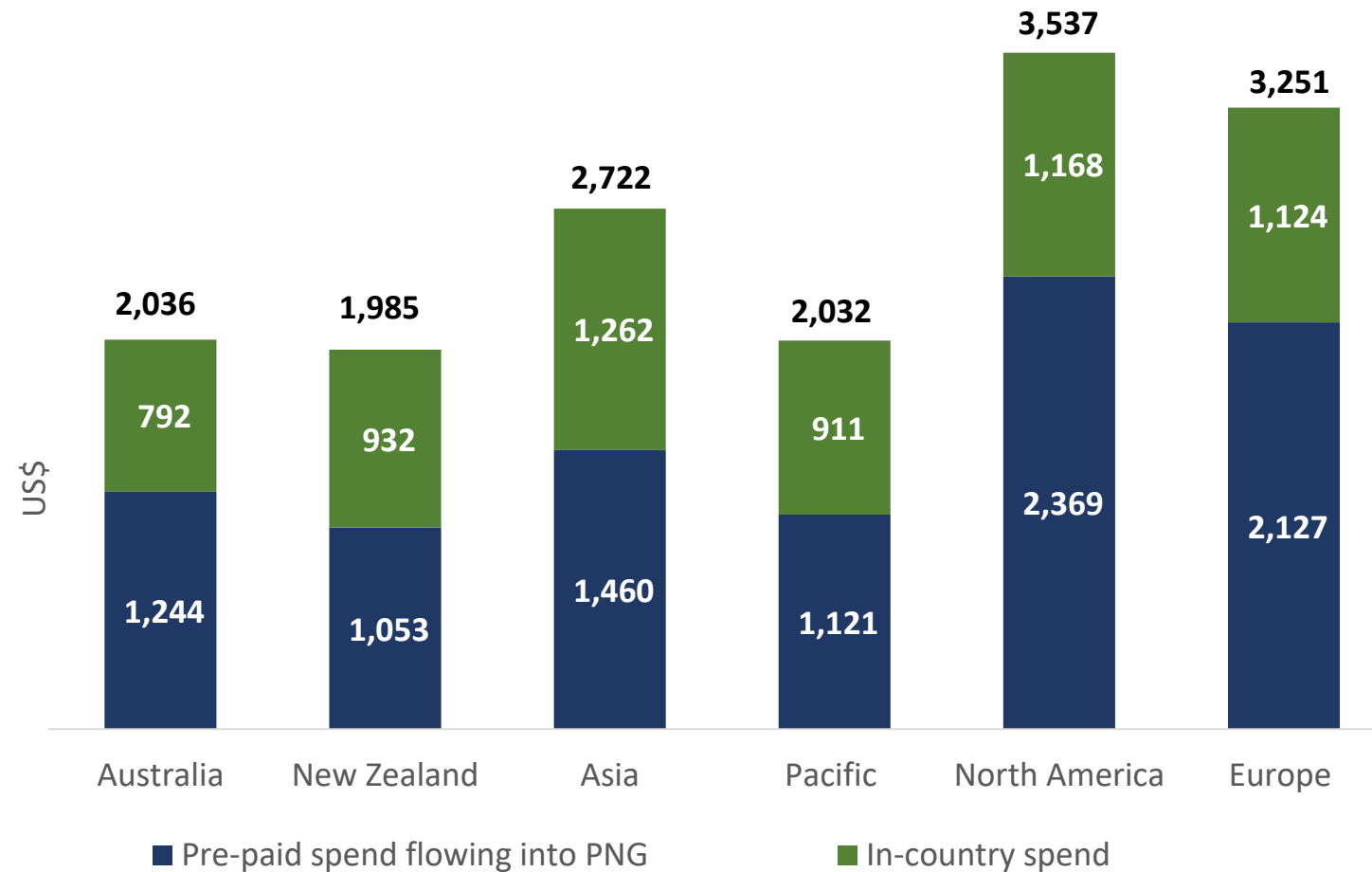
5%



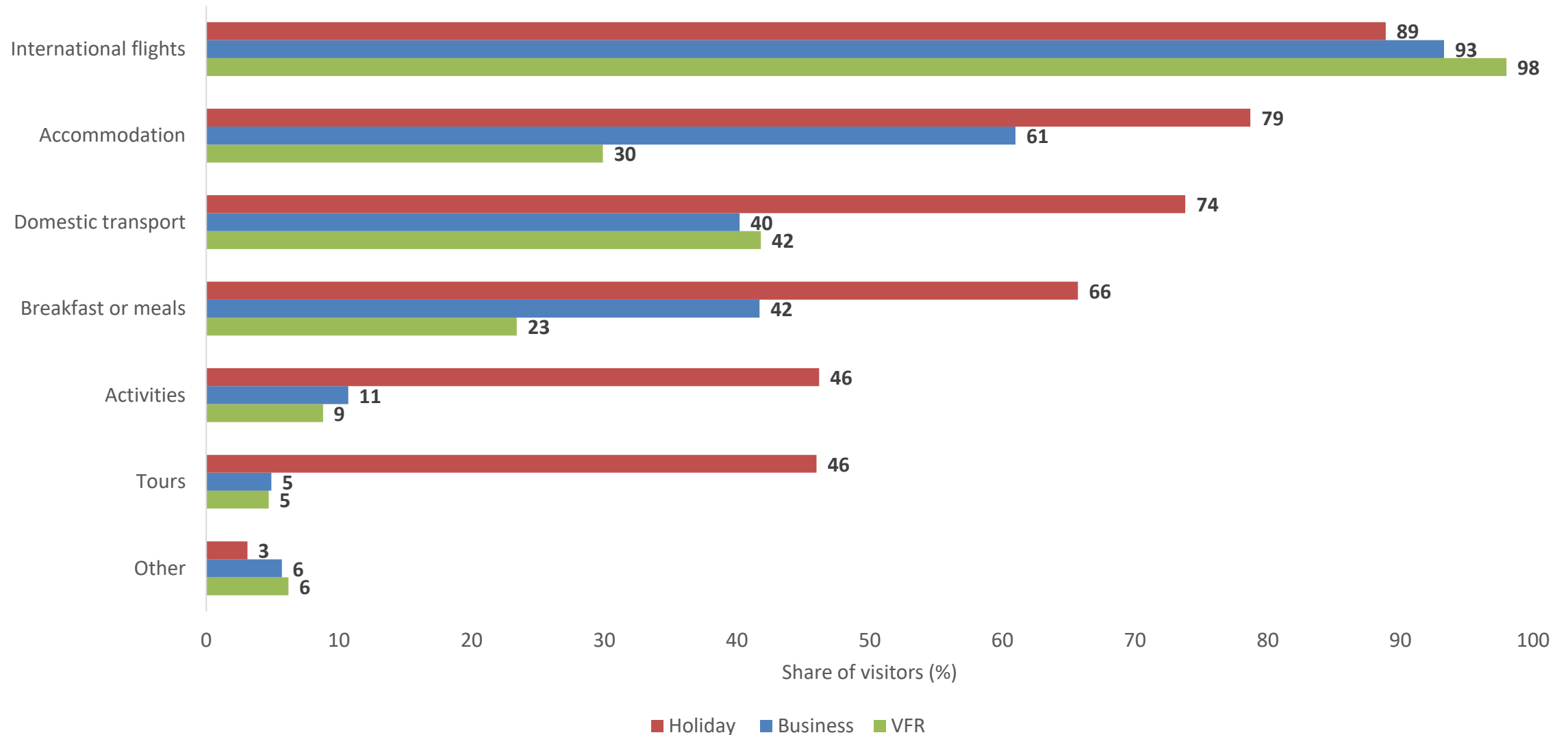
5%

# Expenditure by Source Market USD

## Average Spend Per Person Per Visit



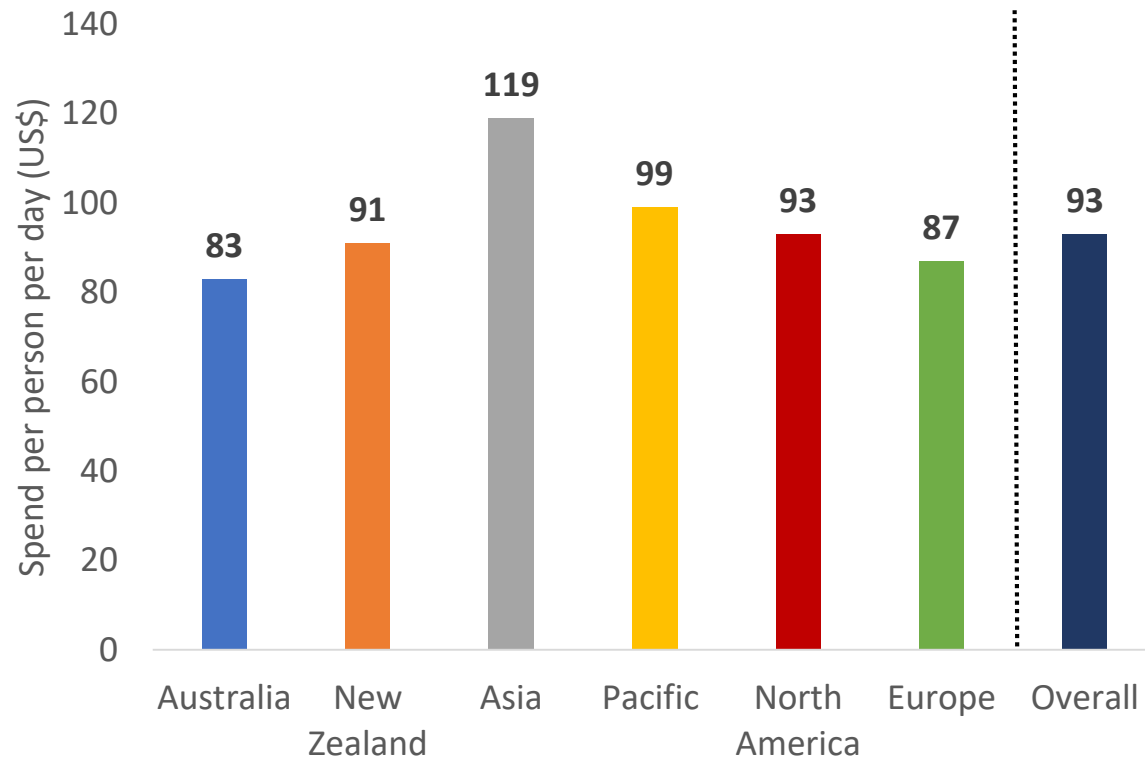
# Percentage of Visitors Spending on Areas Prior to Arrival – Purpose of Visit



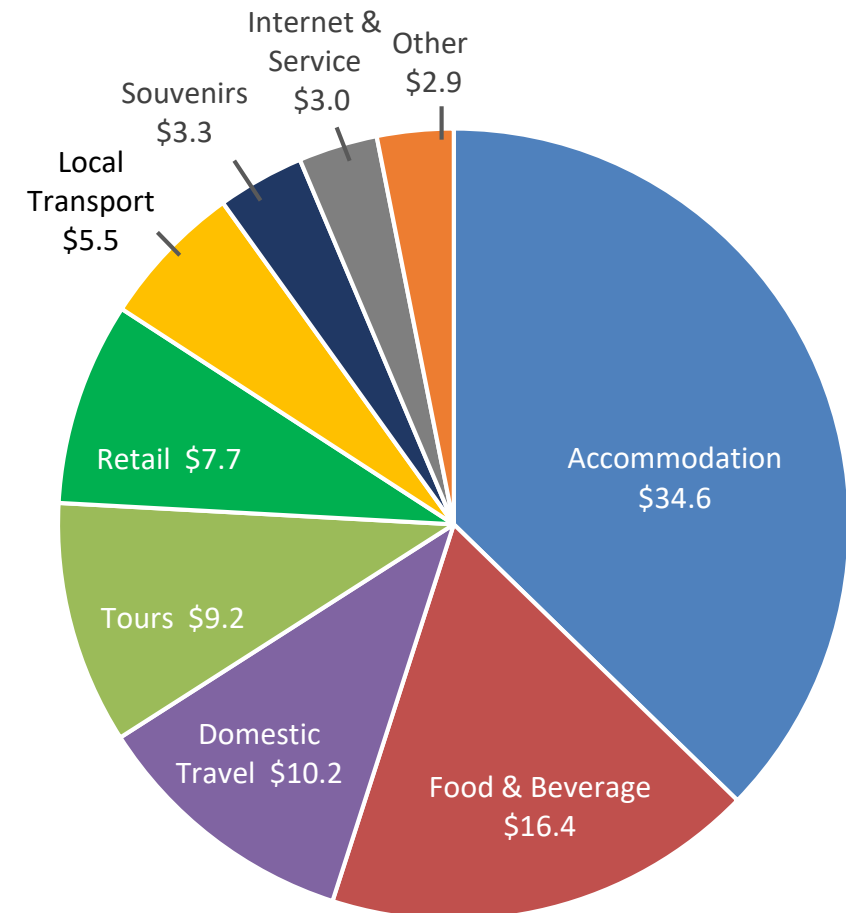
Note: Multiple responses, therefore totals does not add up to 100%

# Average in Country Spend (USD) per person per day

## By Market

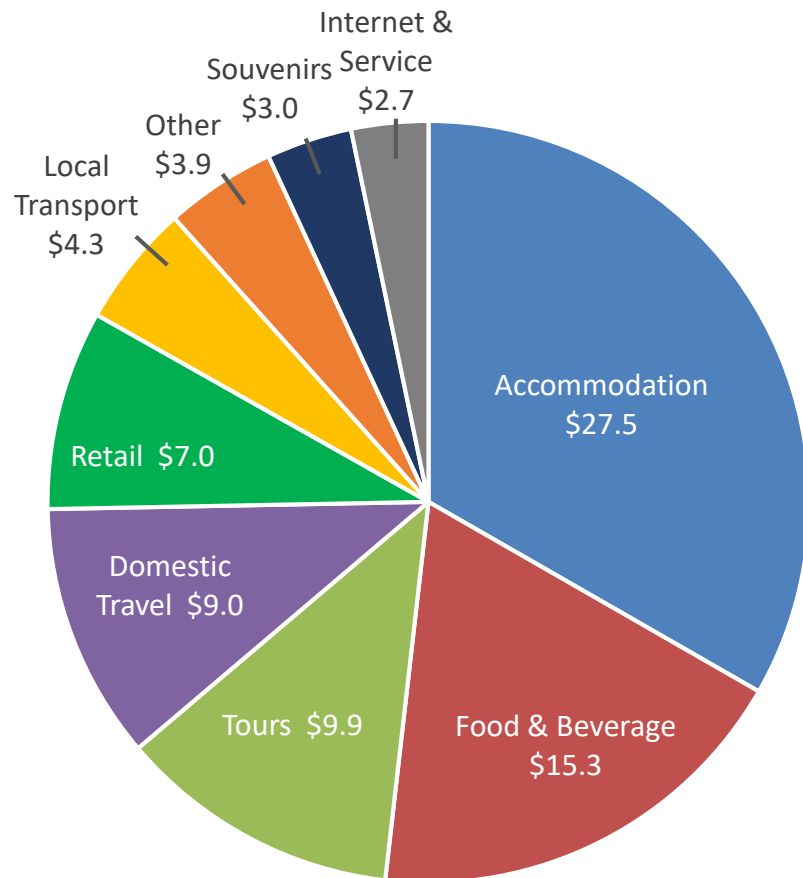


## Overall – US \$93 per day

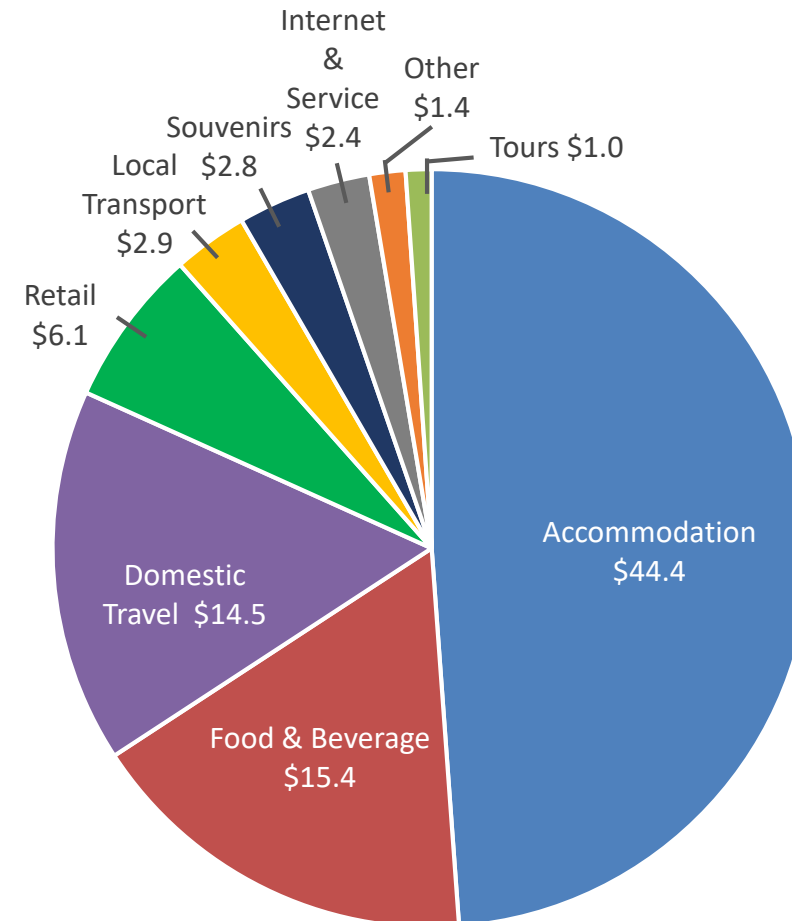


# Average in Country Spend (USD) by Australia and New Zealand Visitors

## Australia – US \$83 per day

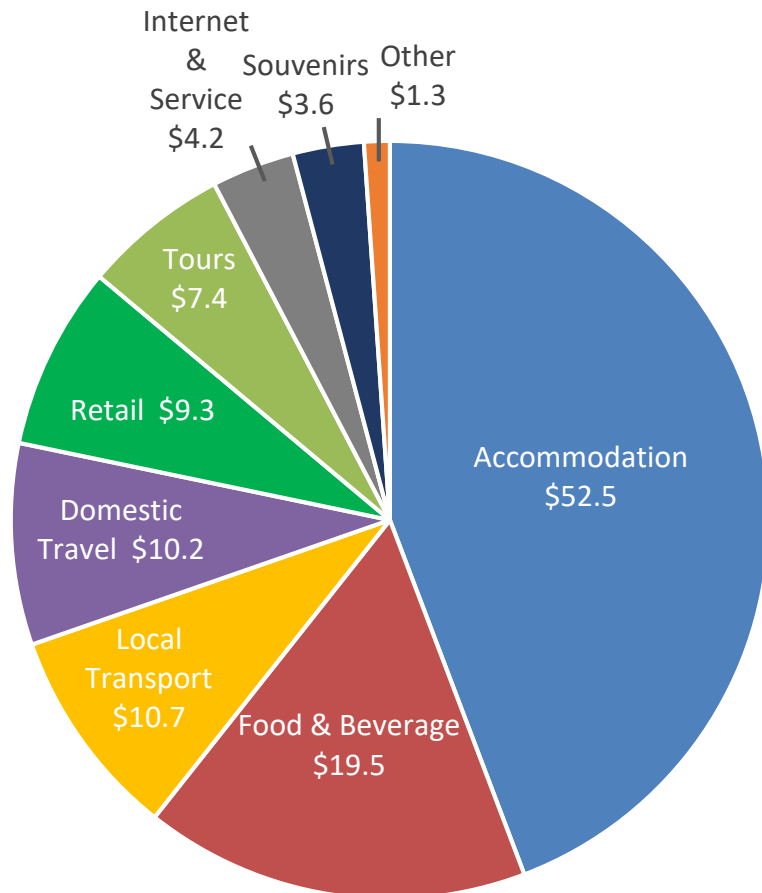


## New Zealand – US \$91 per day

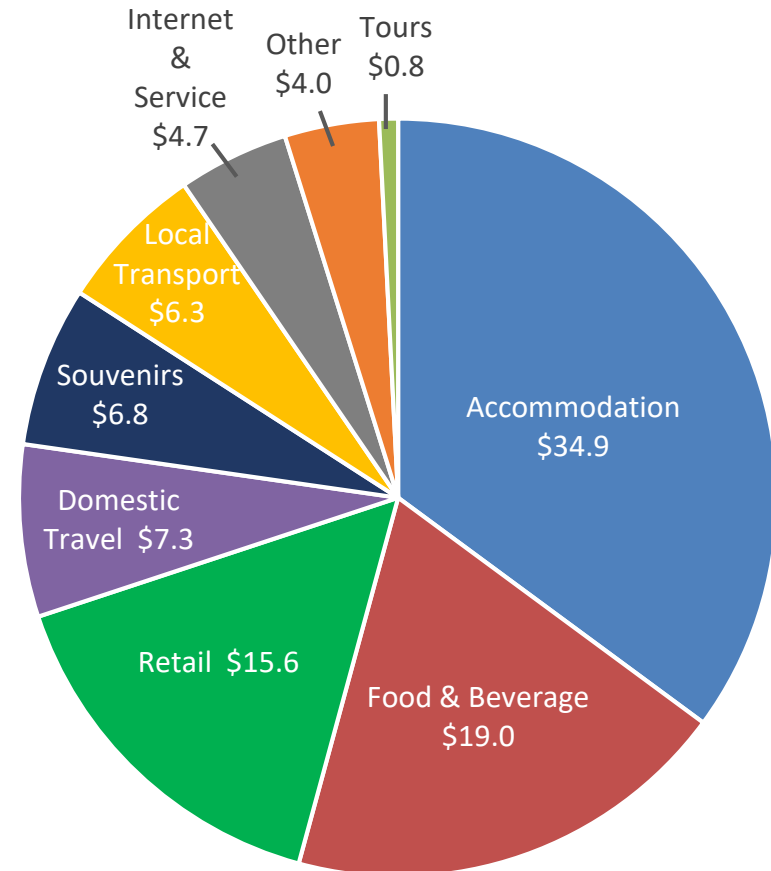


# Average in Country Spend (USD) by Asia and Pacific Visitors

## Asia – US \$119 per day



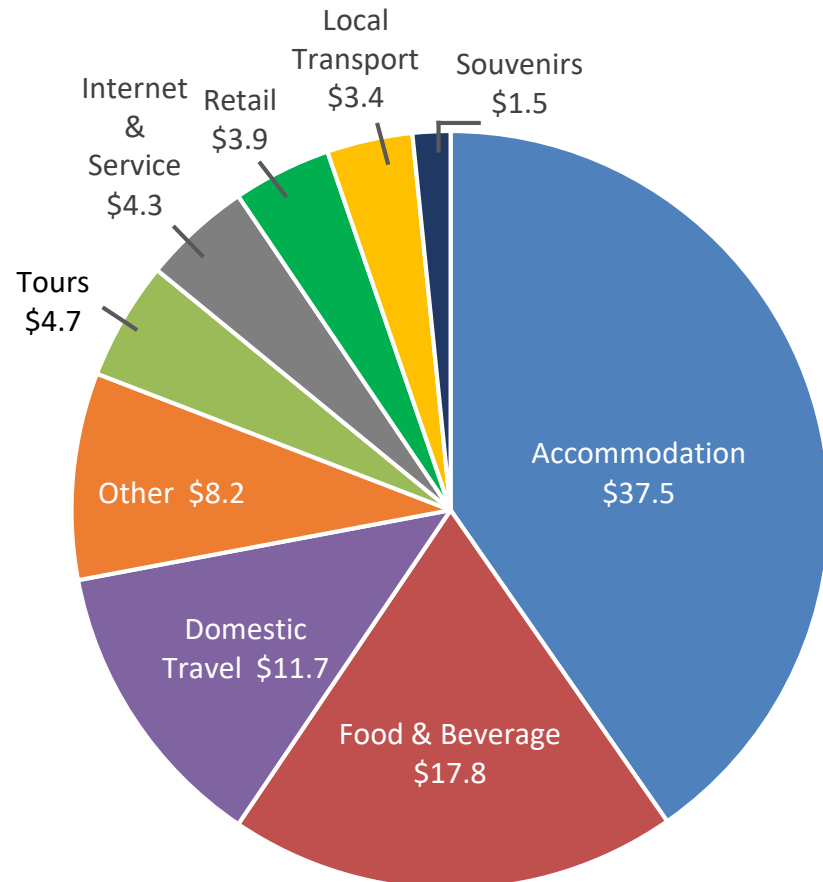
## Pacific – US \$99 per day



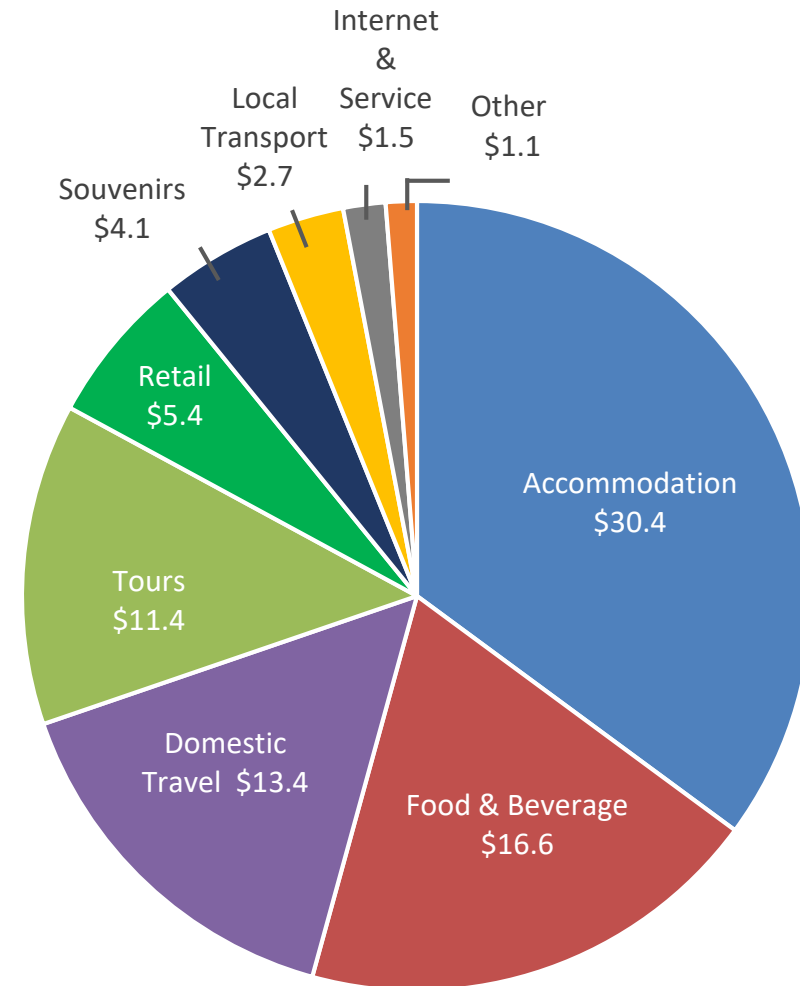


# Average in Country Spend (USD) in PNG by North America and Europe Visitors

## North America – US \$93 per day



## Europe – US \$87 per day



# Presentation Structure



# Information Sources and Decision Making

## 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

## 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



## Information Sources for Planning All Visitors

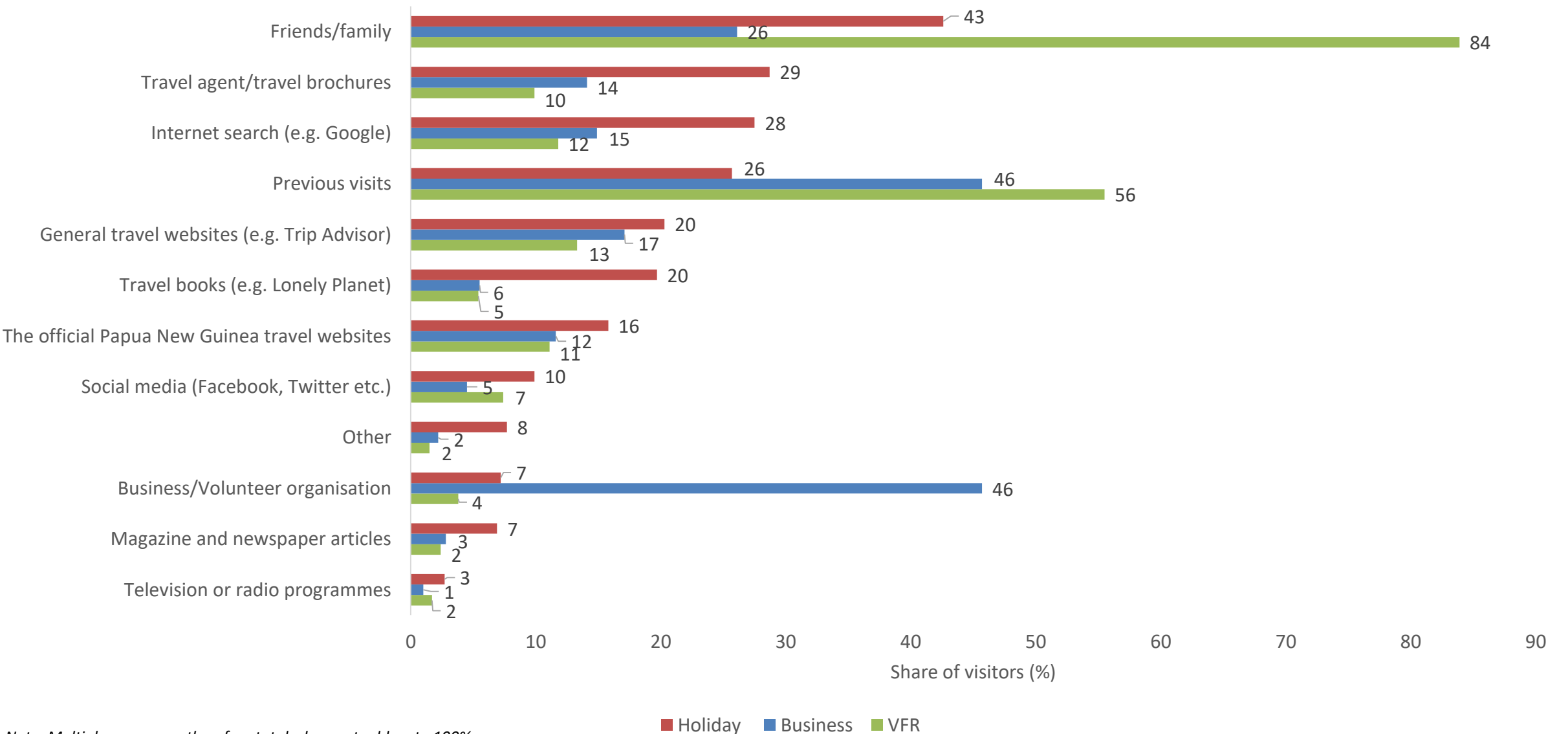
- 43%** Friends and Family
- 41%** Previous Visits
- 25%** Business/Volunteer organisation
- 19%** Internet Search (e.g. Google)



## 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

## Made my own travel arrangements using the internet



<b>35%</b>	<b>Australia</b>
<b>30%</b>	<b>New Zealand</b>
<b>24%</b>	<b>Asia</b>
<b>10%</b>	<b>Pacific</b>
<b>38%</b>	<b>North America</b>
<b>33%</b>	<b>Europe</b>

## Arrangements were made by a travel agent



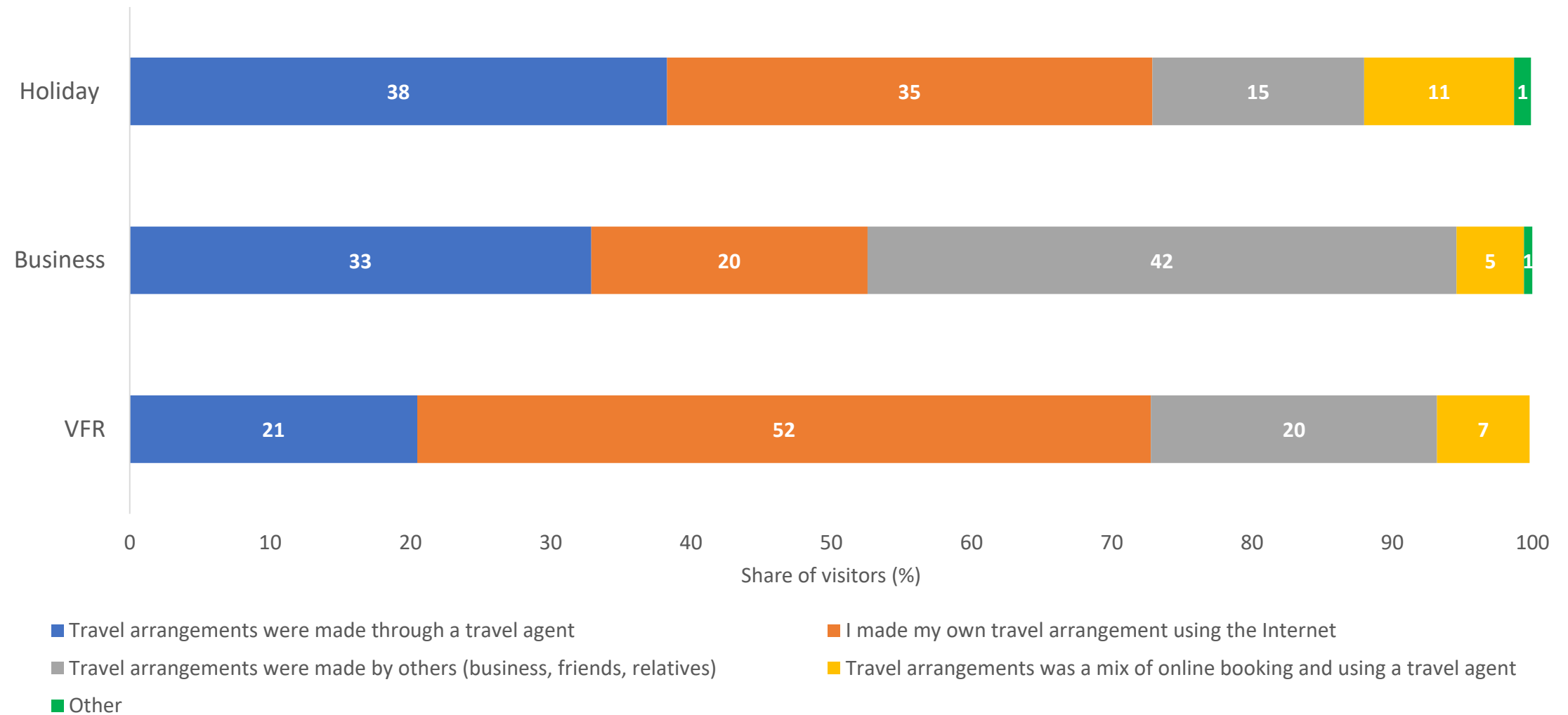
<b>31%</b>	<b>Australia</b>
<b>35%</b>	<b>New Zealand</b>
<b>32%</b>	<b>Asia</b>
<b>38%</b>	<b>Pacific</b>
<b>36%</b>	<b>North America</b>
<b>31%</b>	<b>Europe</b>

## Travel arrangements were made by others



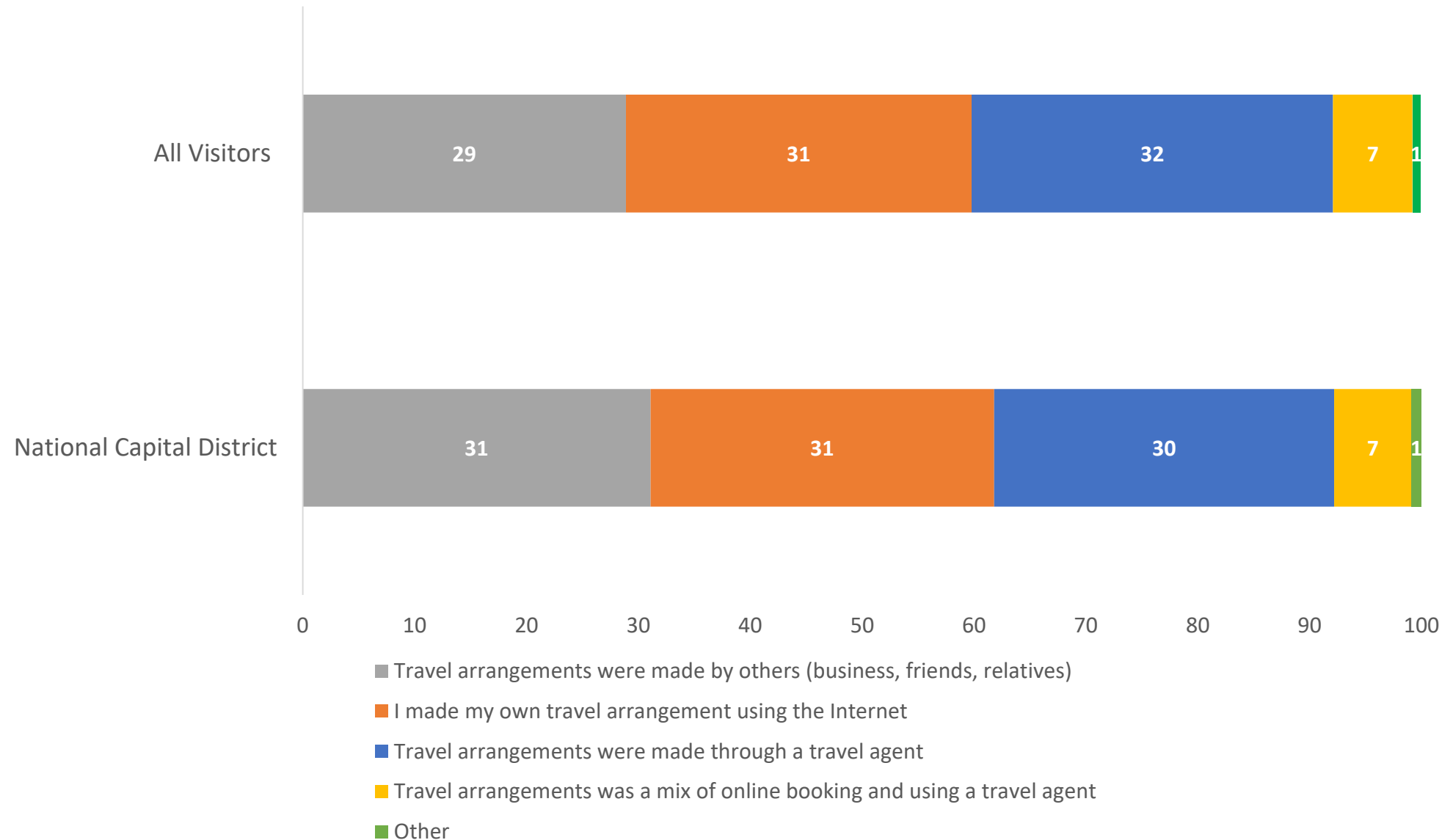
<b>27%</b>	<b>Australia</b>
<b>27%</b>	<b>New Zealand</b>
<b>37%</b>	<b>Asia</b>
<b>43%</b>	<b>Pacific</b>
<b>15%</b>	<b>North America</b>
<b>20%</b>	<b>Europe</b>

# Travel Purchasing Behaviour – Purpose of Visit

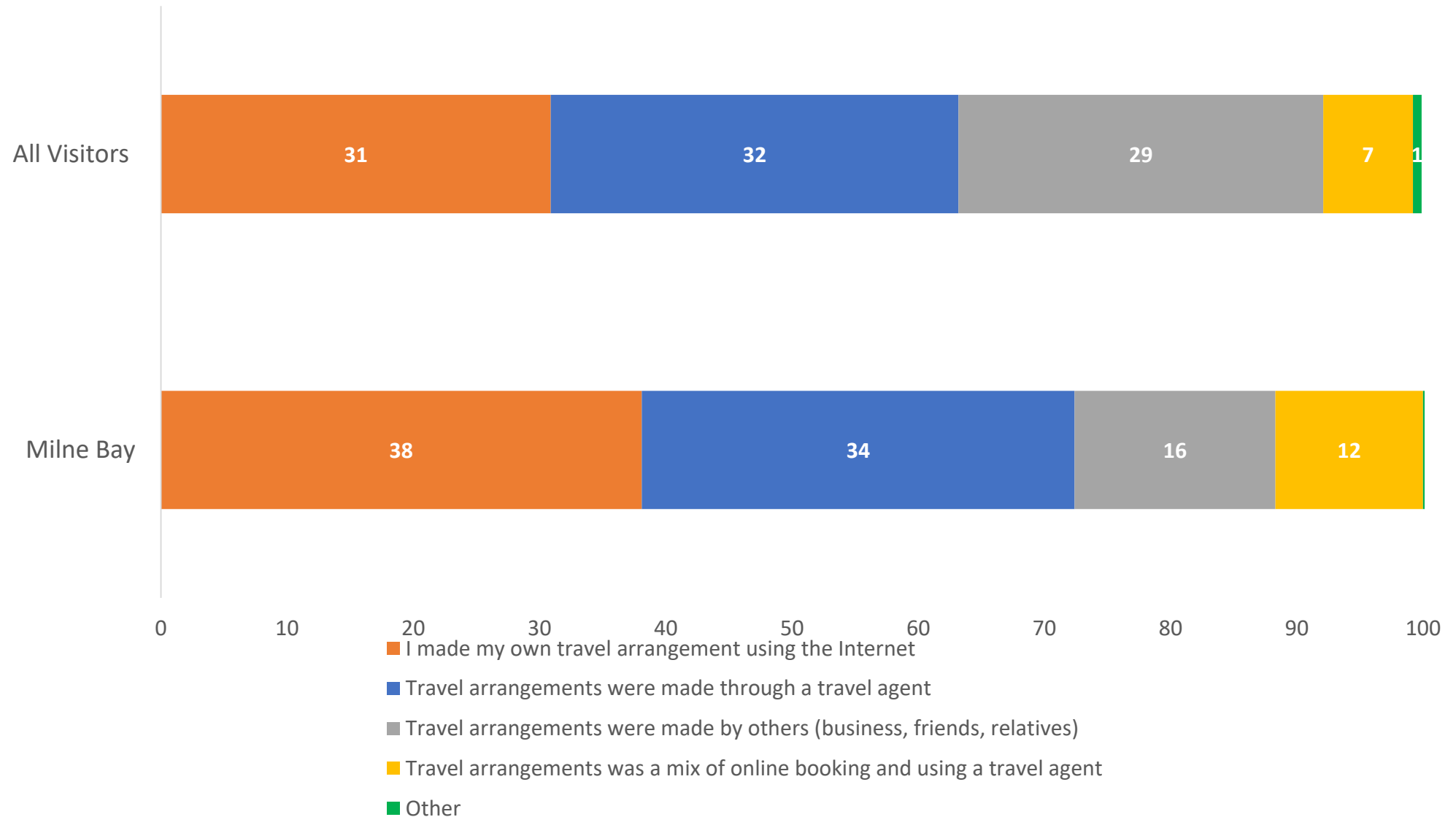




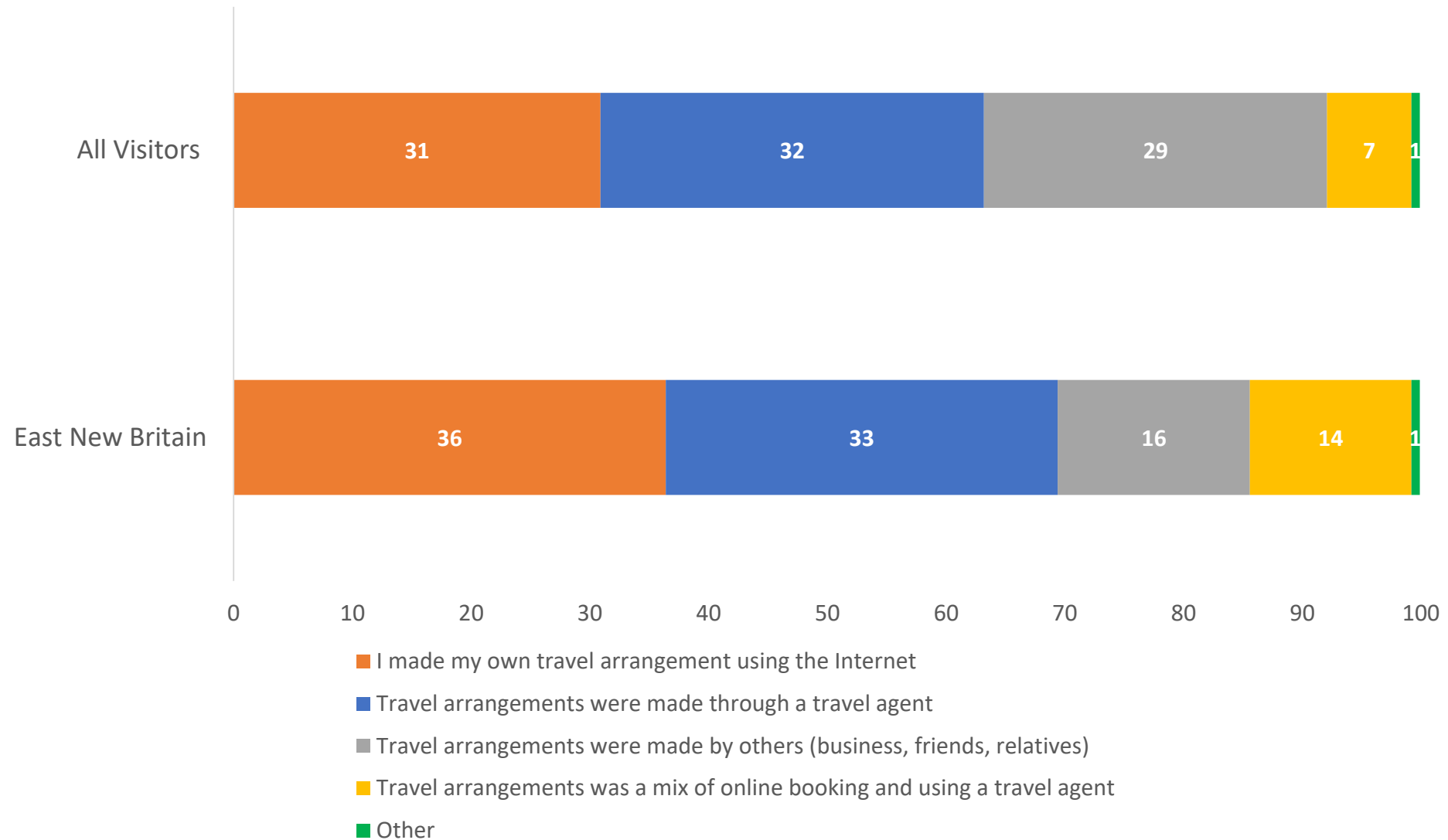
# Travel Purchasing Behaviour – National Capital District



# Travel Purchasing Behaviour – Milne Bay

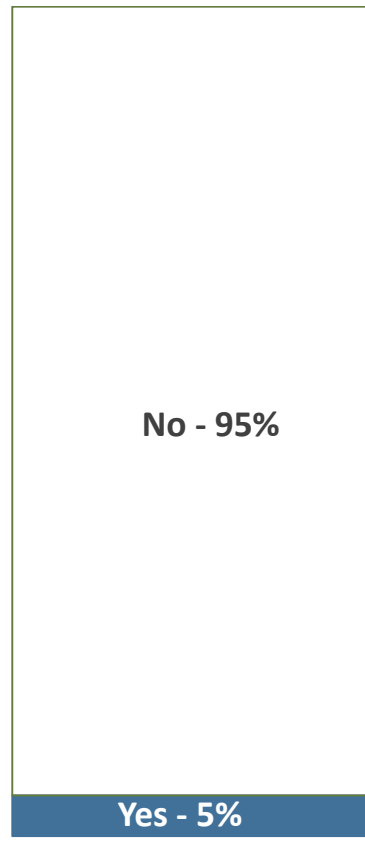


# Travel Purchasing Behaviour – East New Britain

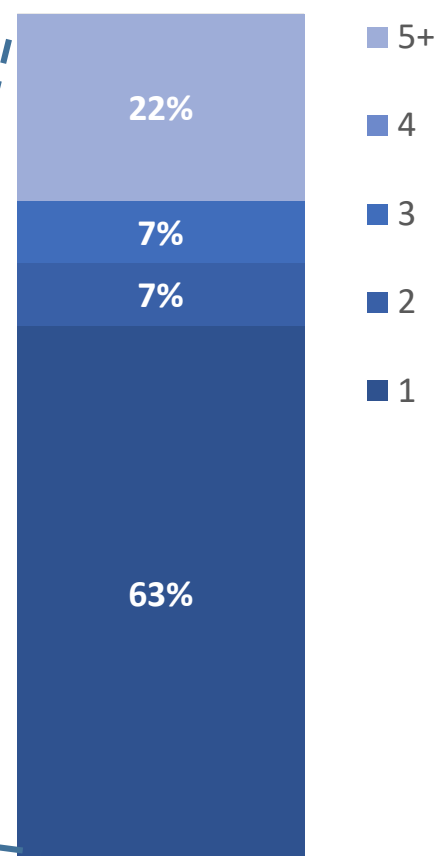


# Cruise visits to PNG – Australia and New Zealand Holiday Visitors

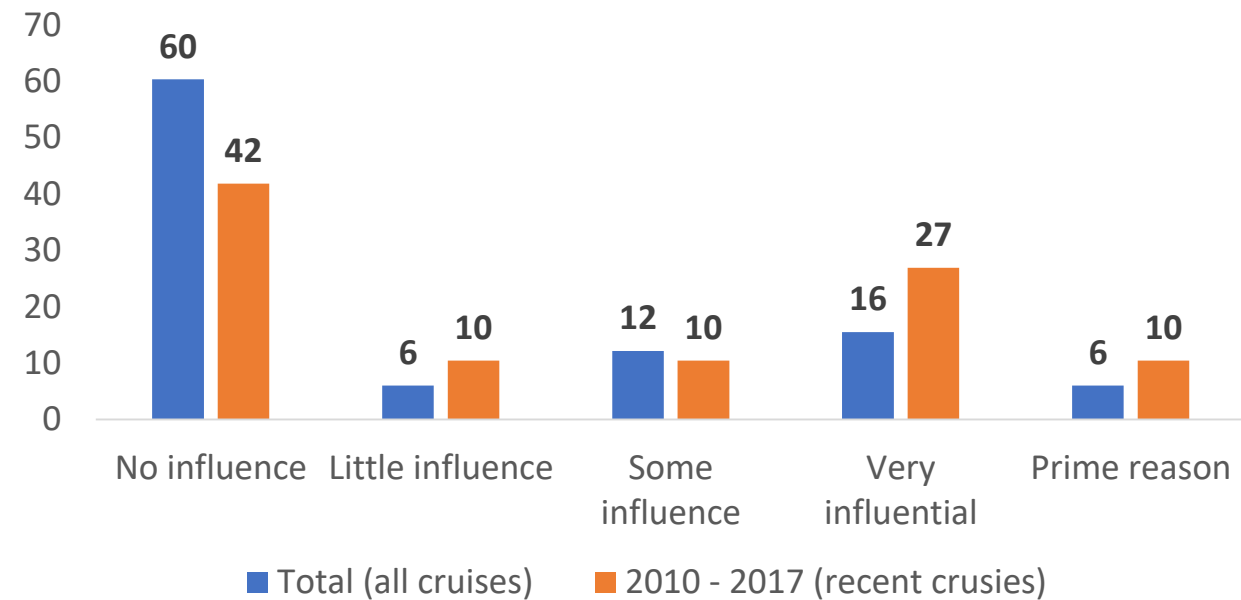
Been on a cruise to PNG before?



If Yes, how many times?



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



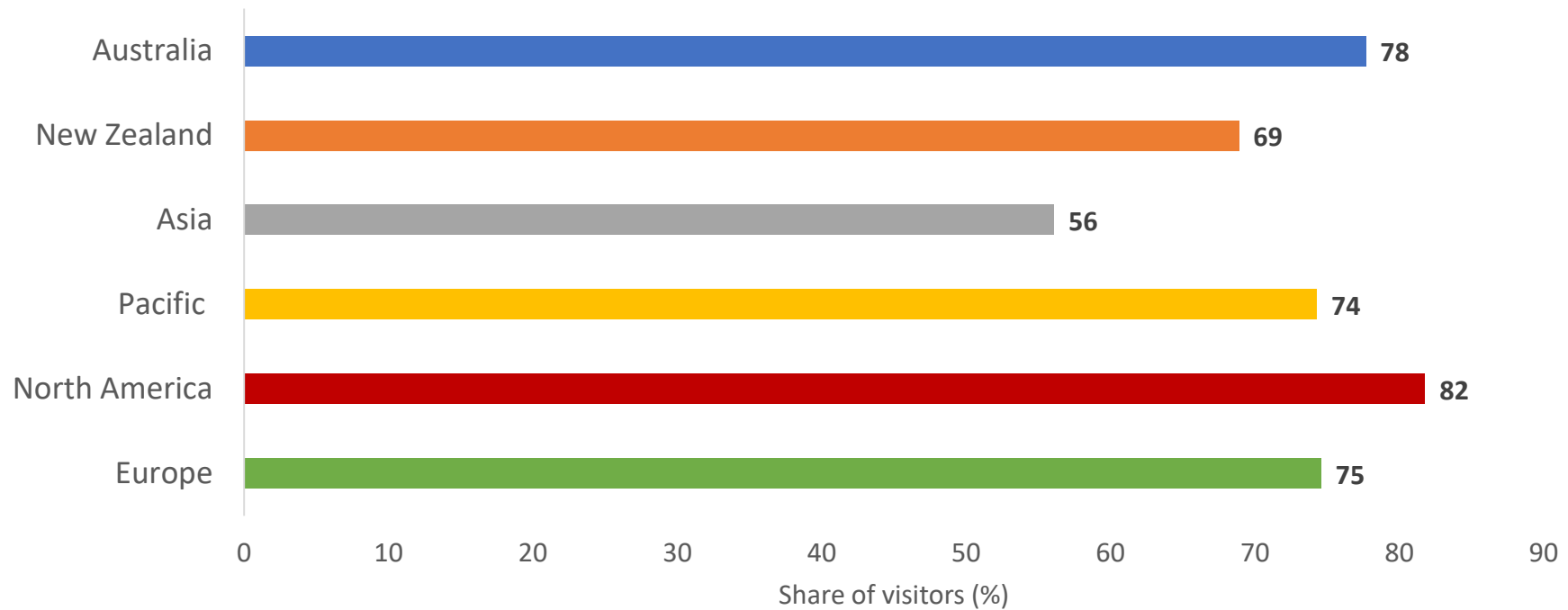
Note: Due to rounding some totals will add to 99% or 101%

# Presentation Structure



# Visitor Satisfaction\* by Country and Purpose of Visit

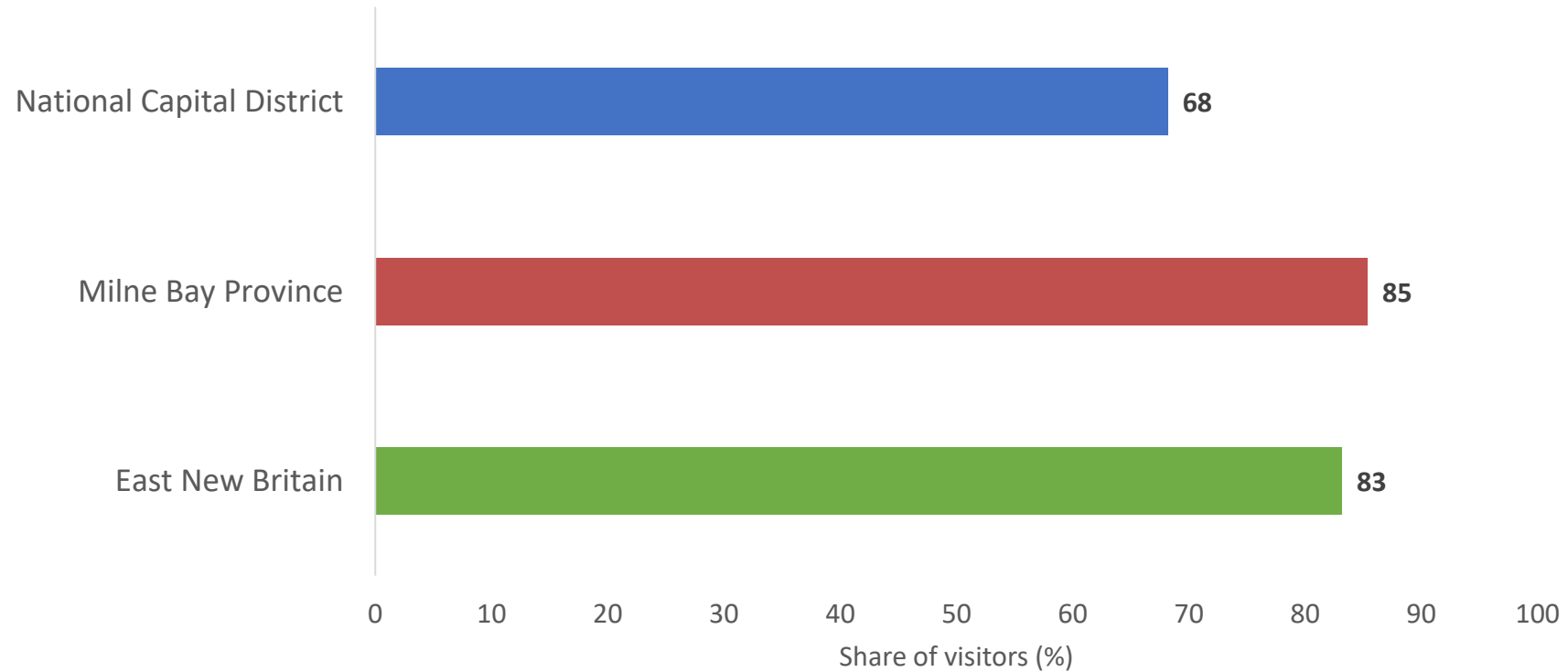
**74% of total visitors were satisfied**  
**77% of first time visitors were satisfied**  
**69% of repeat visitors were satisfied**



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

# Visitor Satisfaction\* by Region

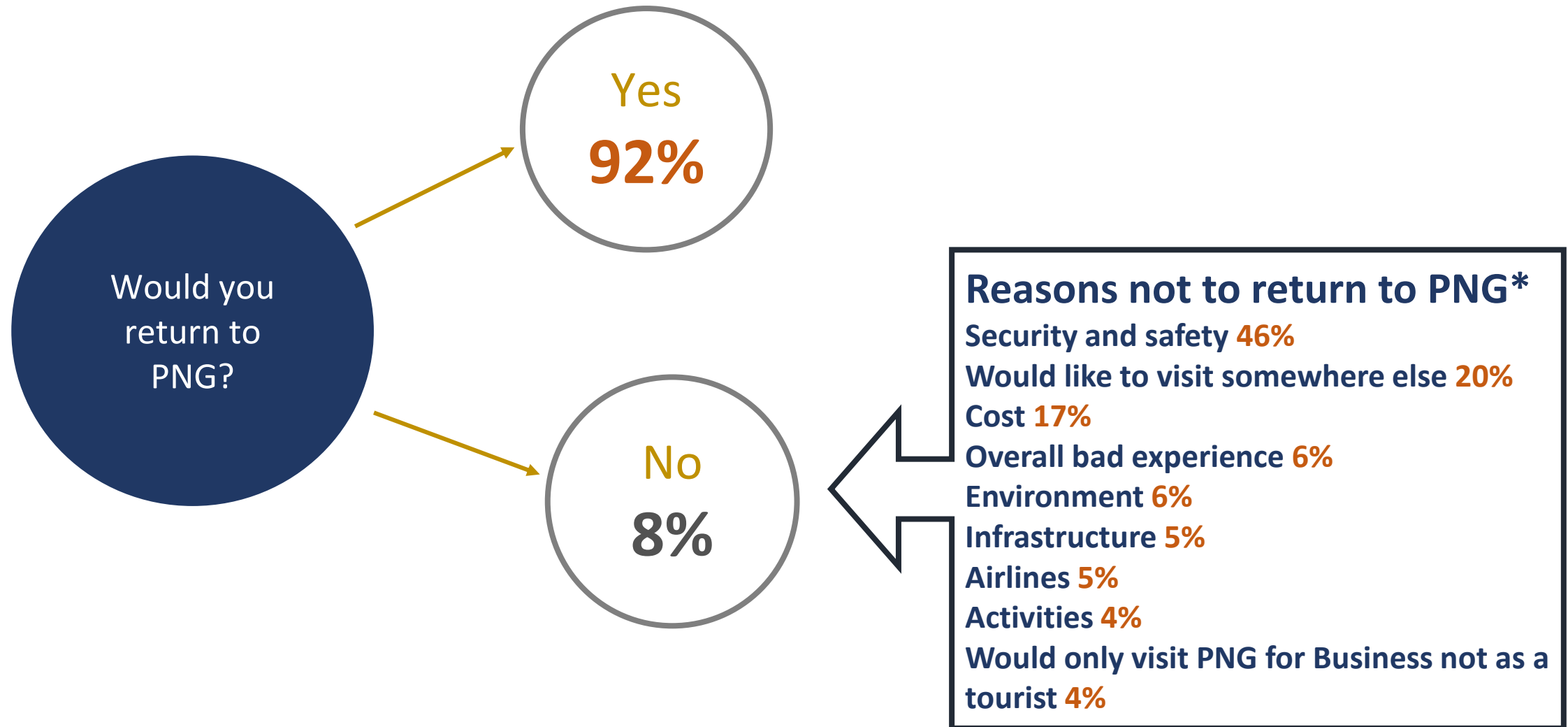
63



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

# Willingness to Return – All Visitors

64

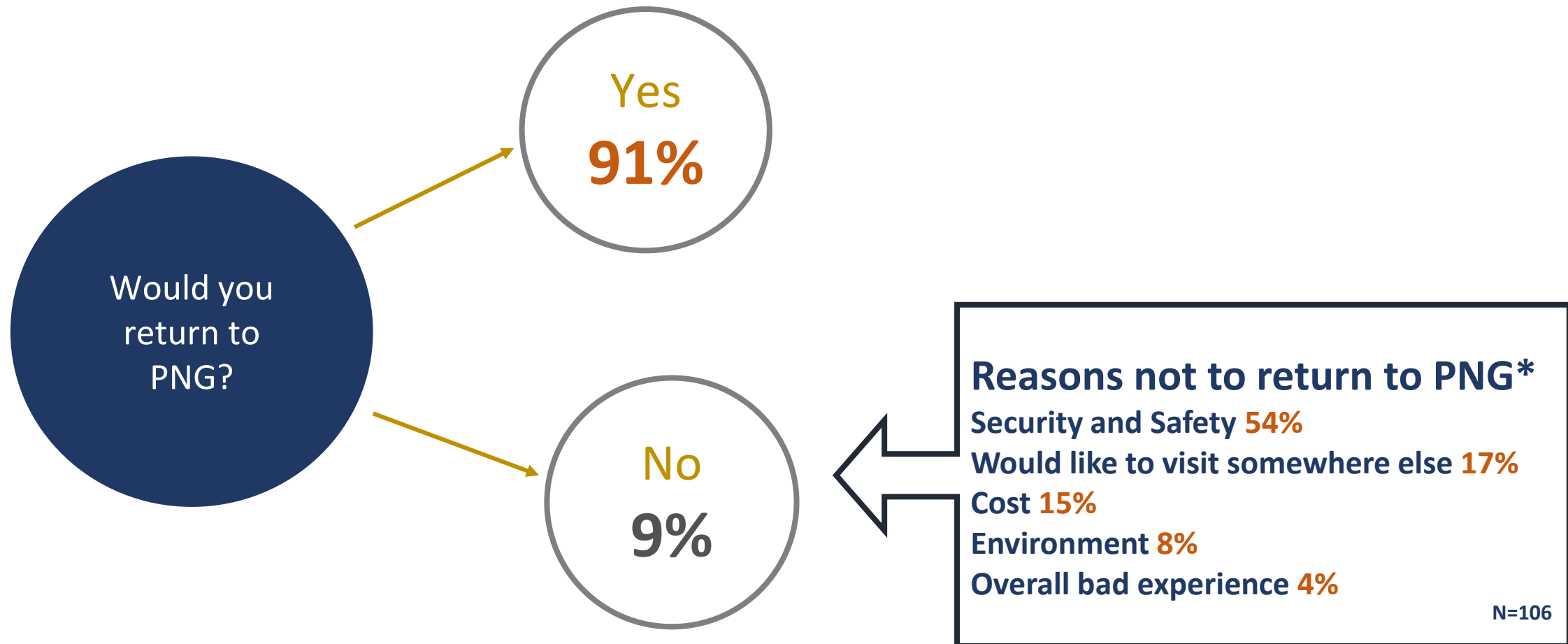


\* Other reasons have not been included due to low percentages.



# Willingness to Return – National Capital District Visitors

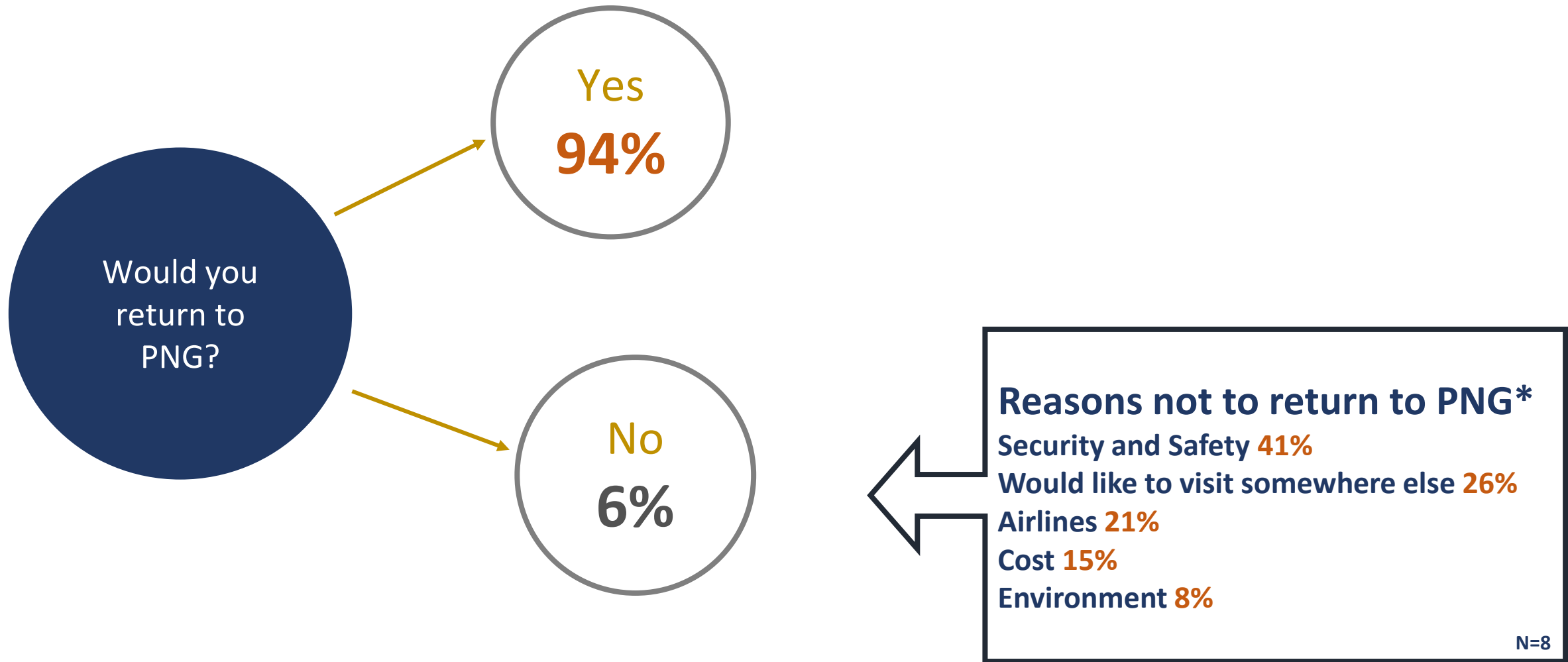
65



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

# Willingness to Return – Milne Bay Visitors

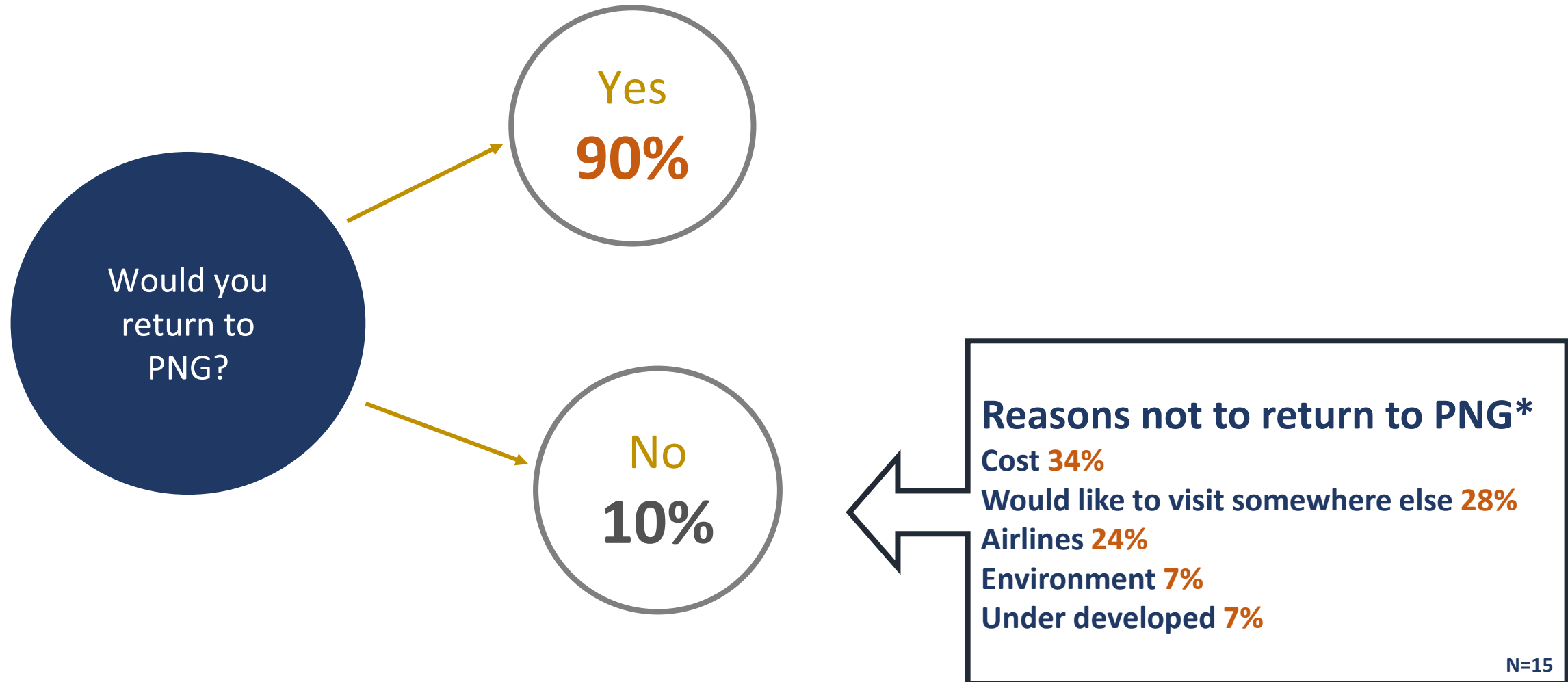
66



\* 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



## 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

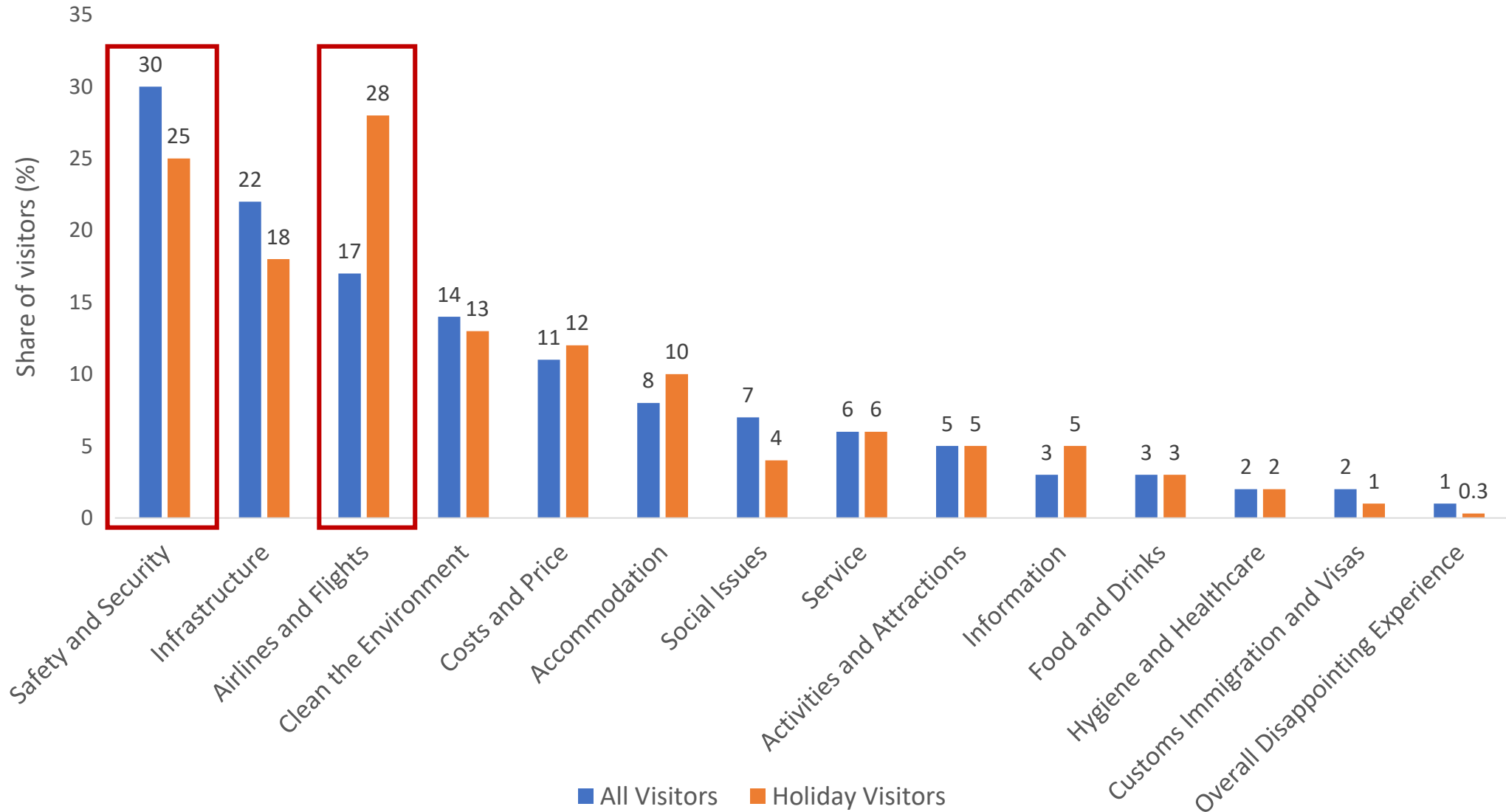
- 43%** People
- 39%** Activities and Attractions
- 32%** Scenery or Landscape



## Least Appealing - Holiday Visitors

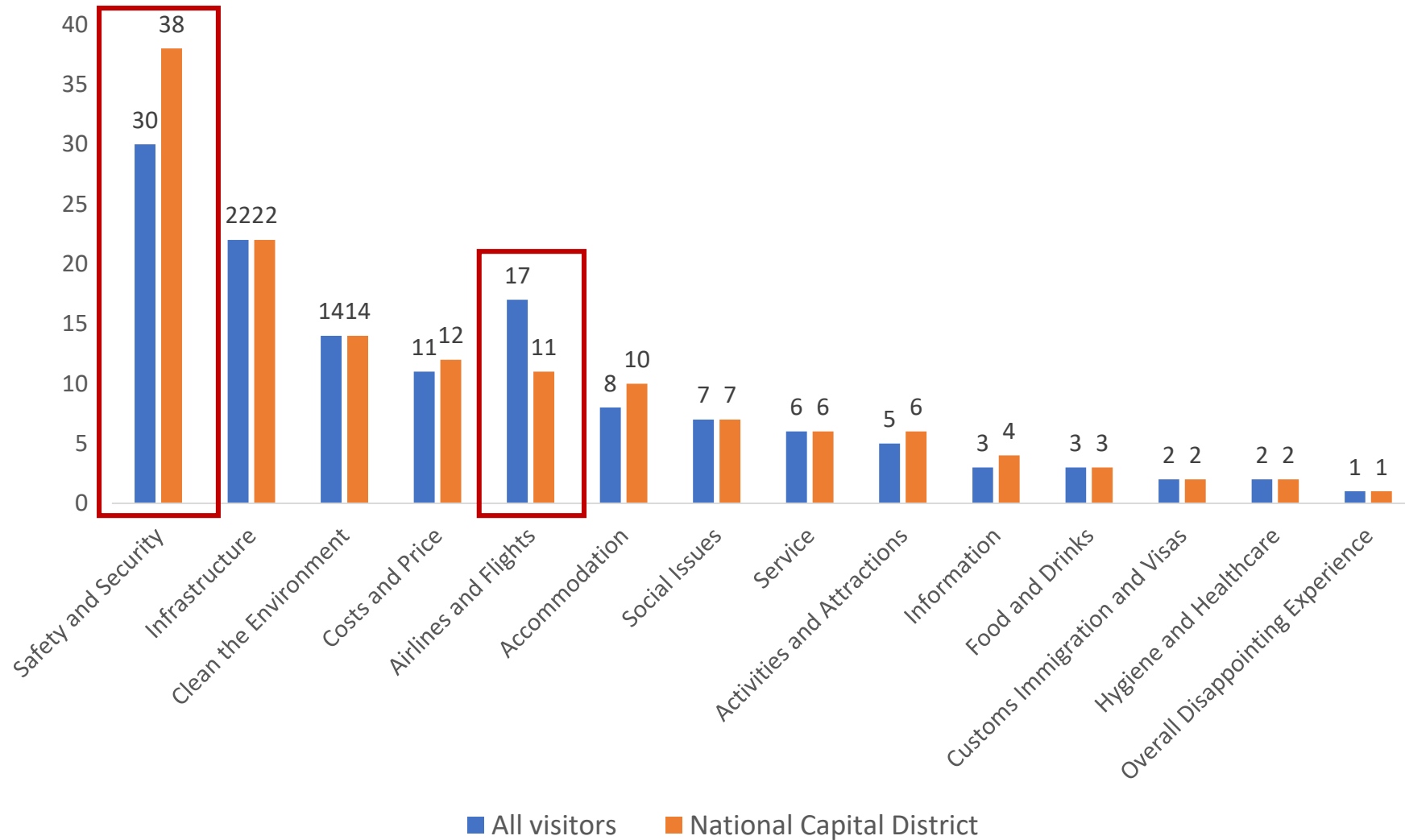
- 28%** Safety and Security
- 27%** Environment and Rubbish
- 16%** Infrastructure

# Suggestions for Improvement – All Visitors and Holiday Visitors



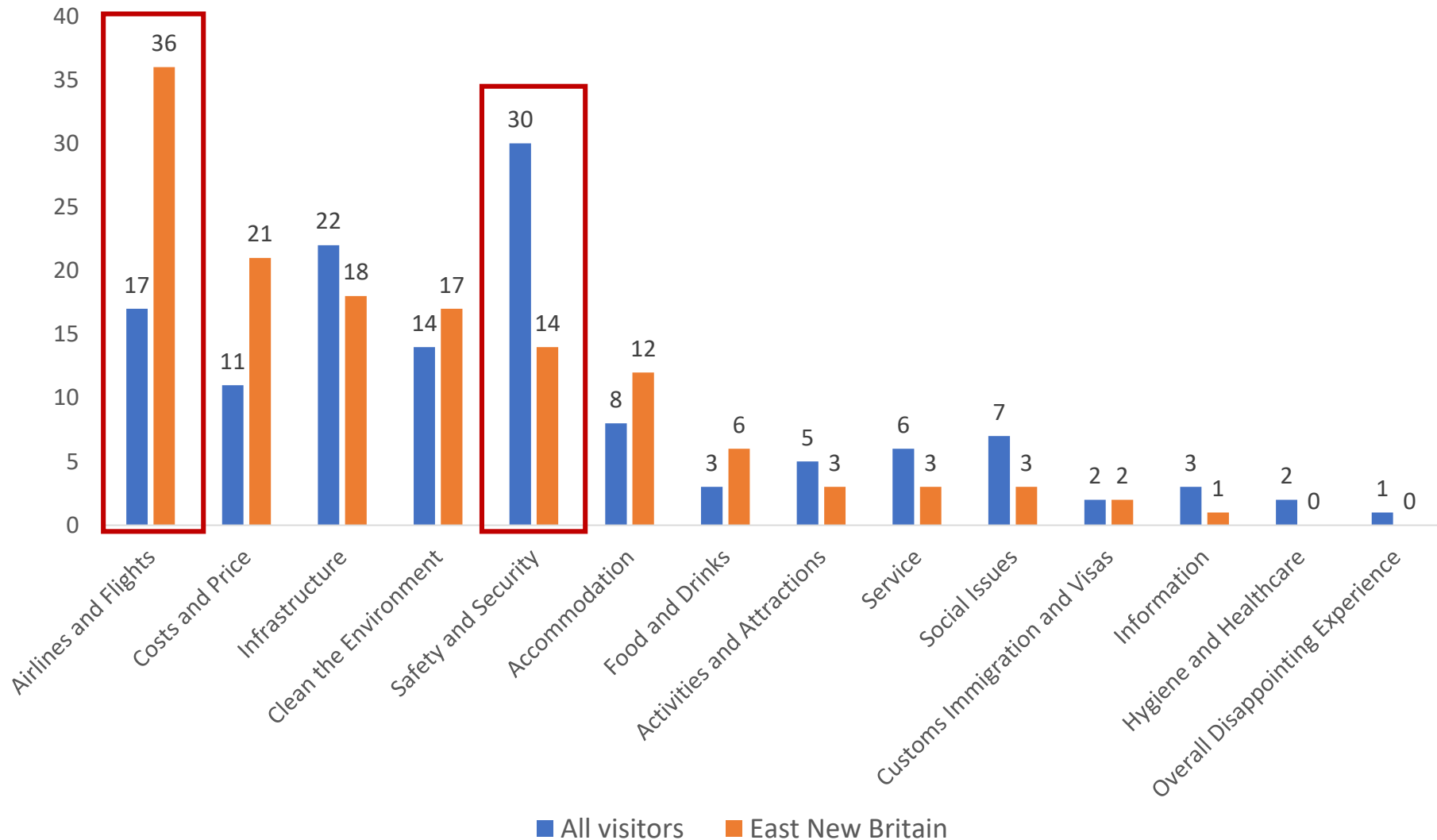
Note: Multiple responses, therefore totals do not add up to 100%

# Suggestions for Improvement – National Capital District



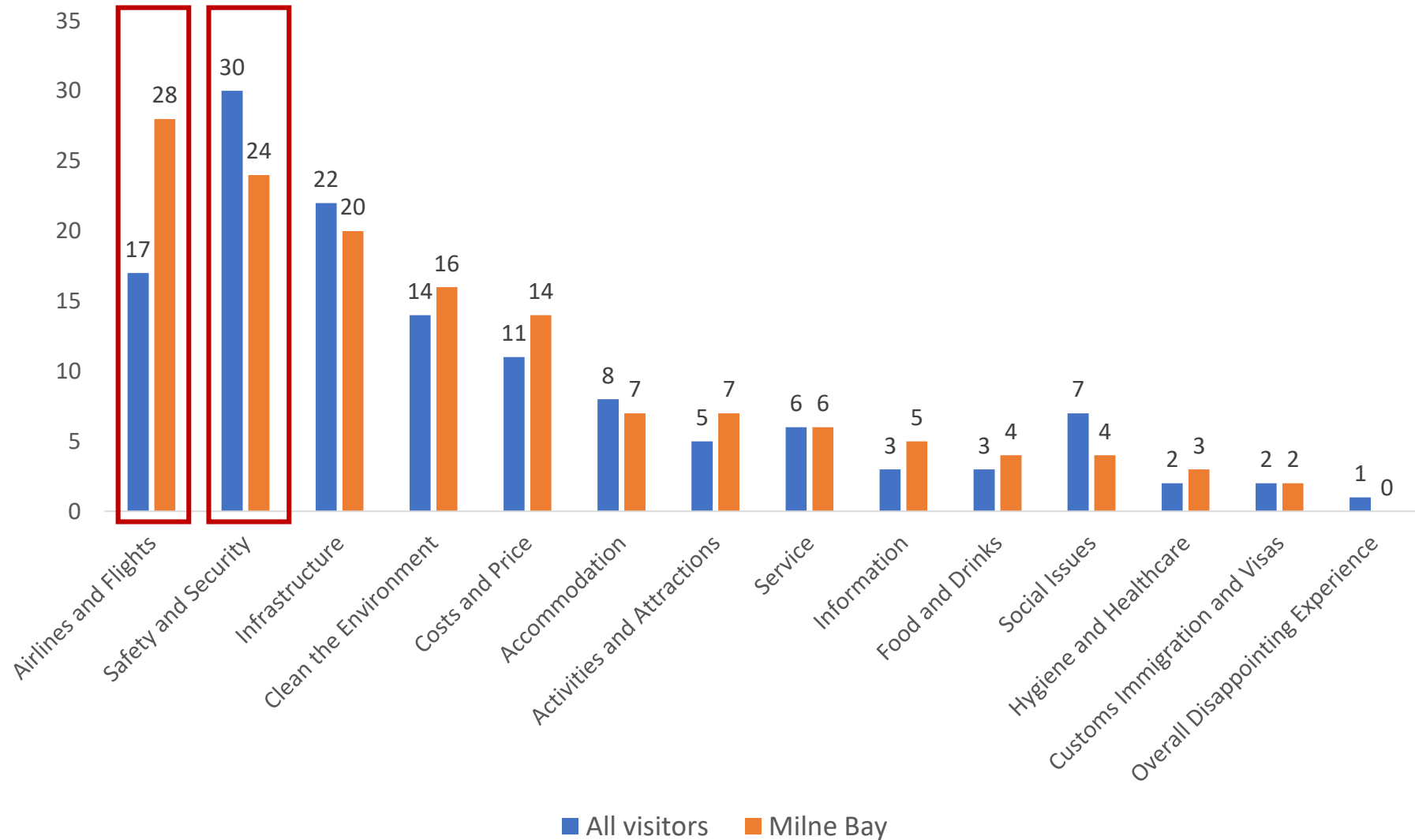
Note: Multiple responses, therefore totals do not add up to 100%

# Suggestions for Improvement – East New Britain



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

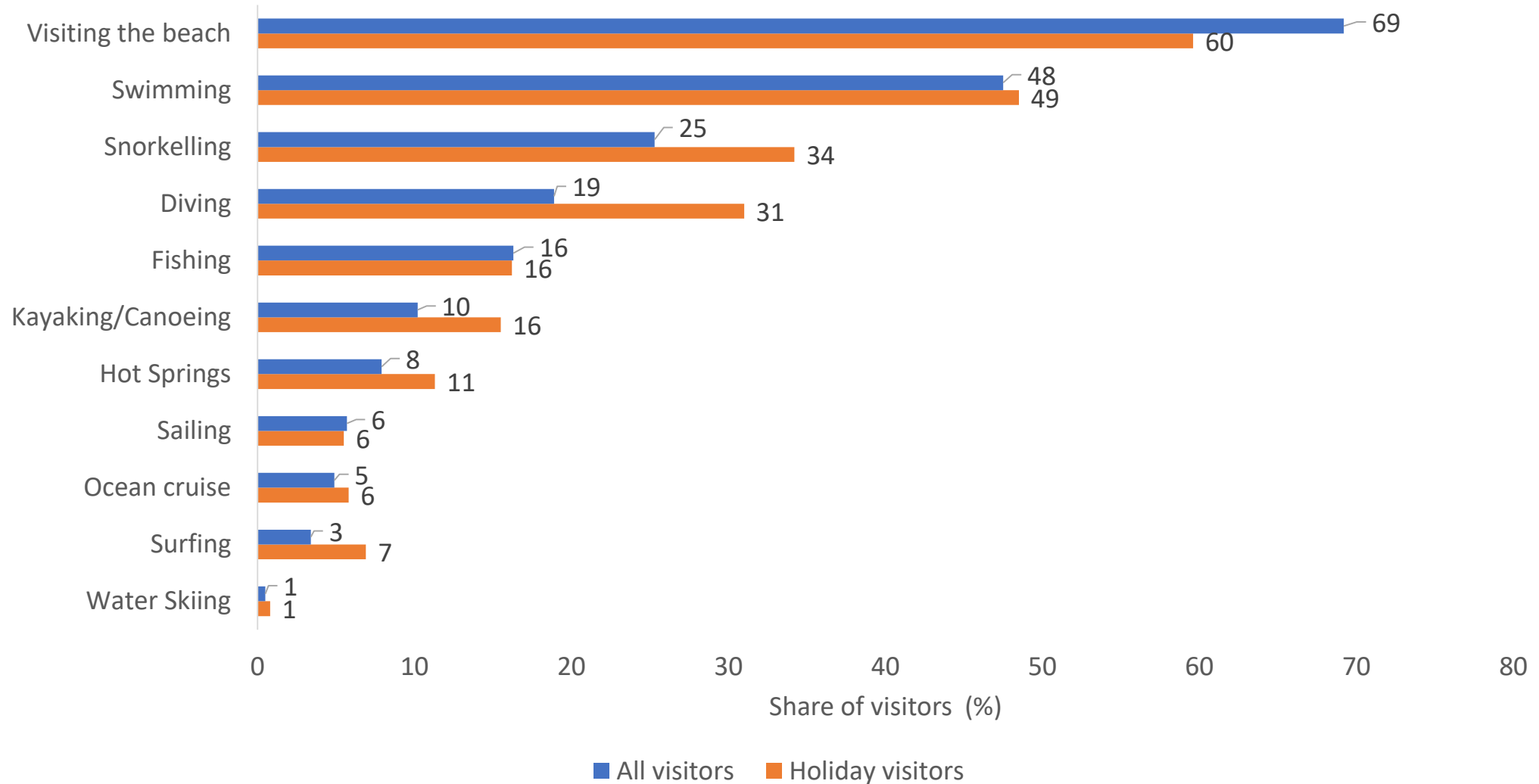
# Suggestions for Improvement – Milne Bay



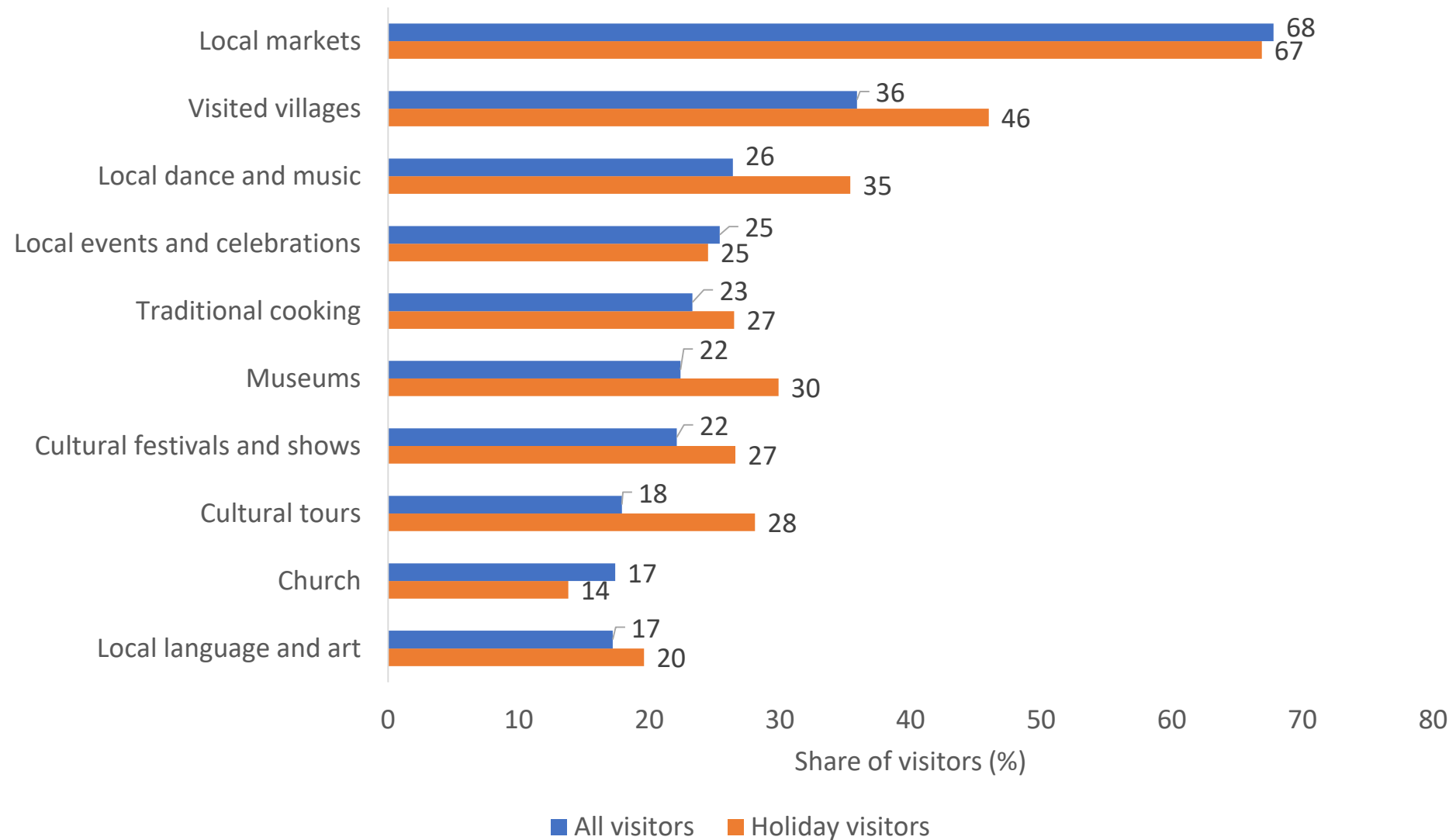
Note: Multiple responses, therefore totals do not add up to 100%



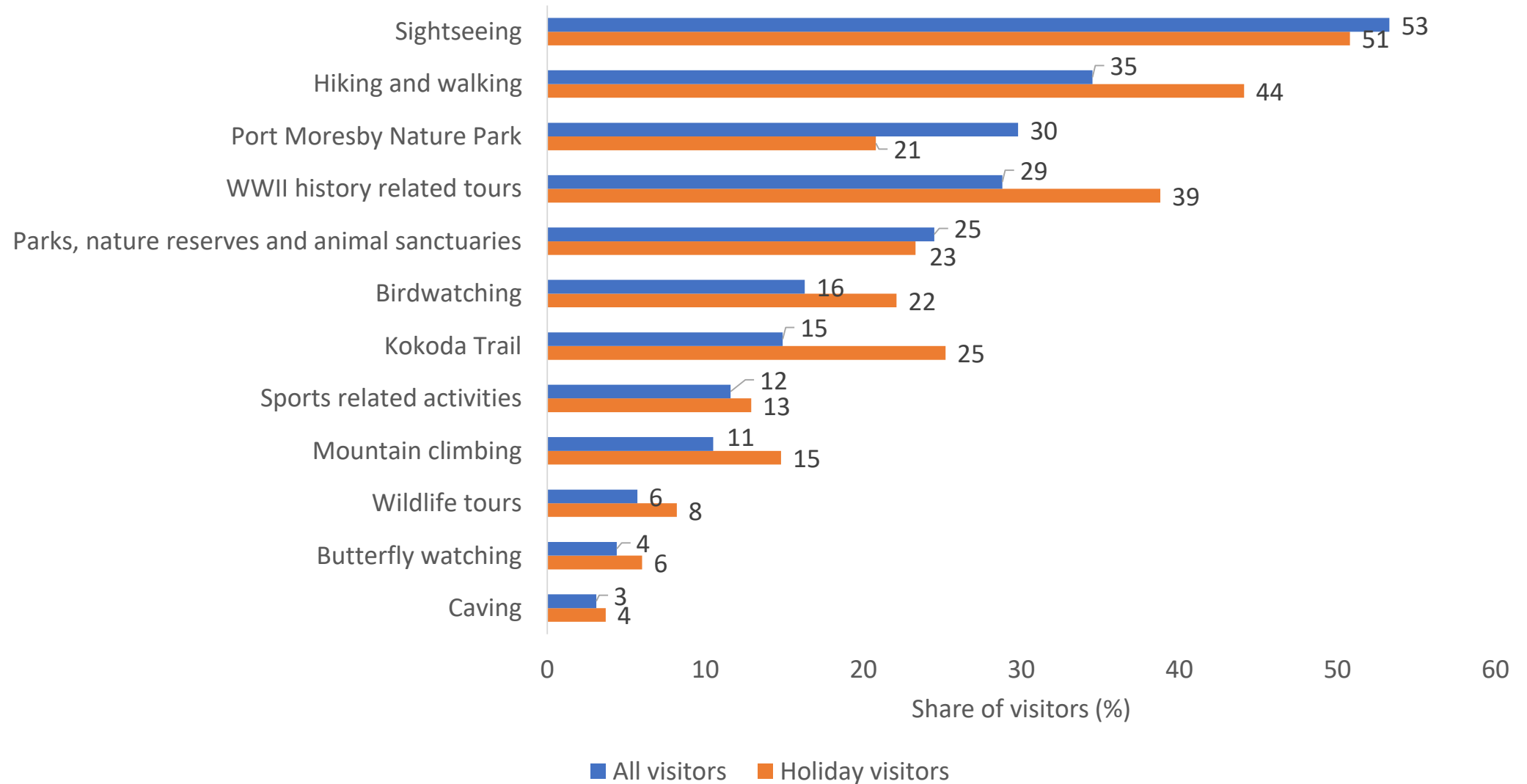
# Participation in Water Based Activities – All Visitors vs Holiday Visitors



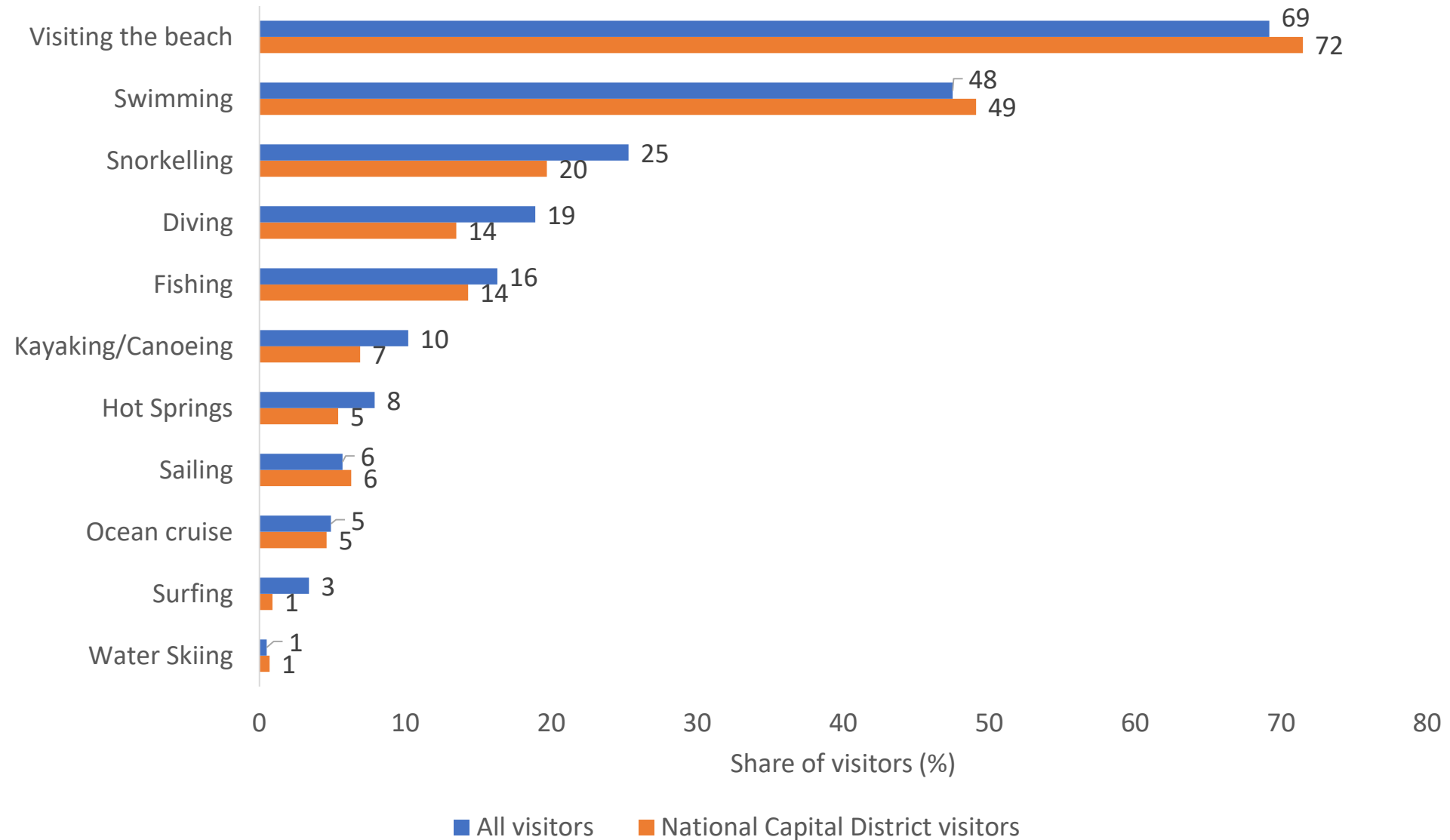
# Participation in Cultural Based Activities – All Visitors vs Holiday Visitors



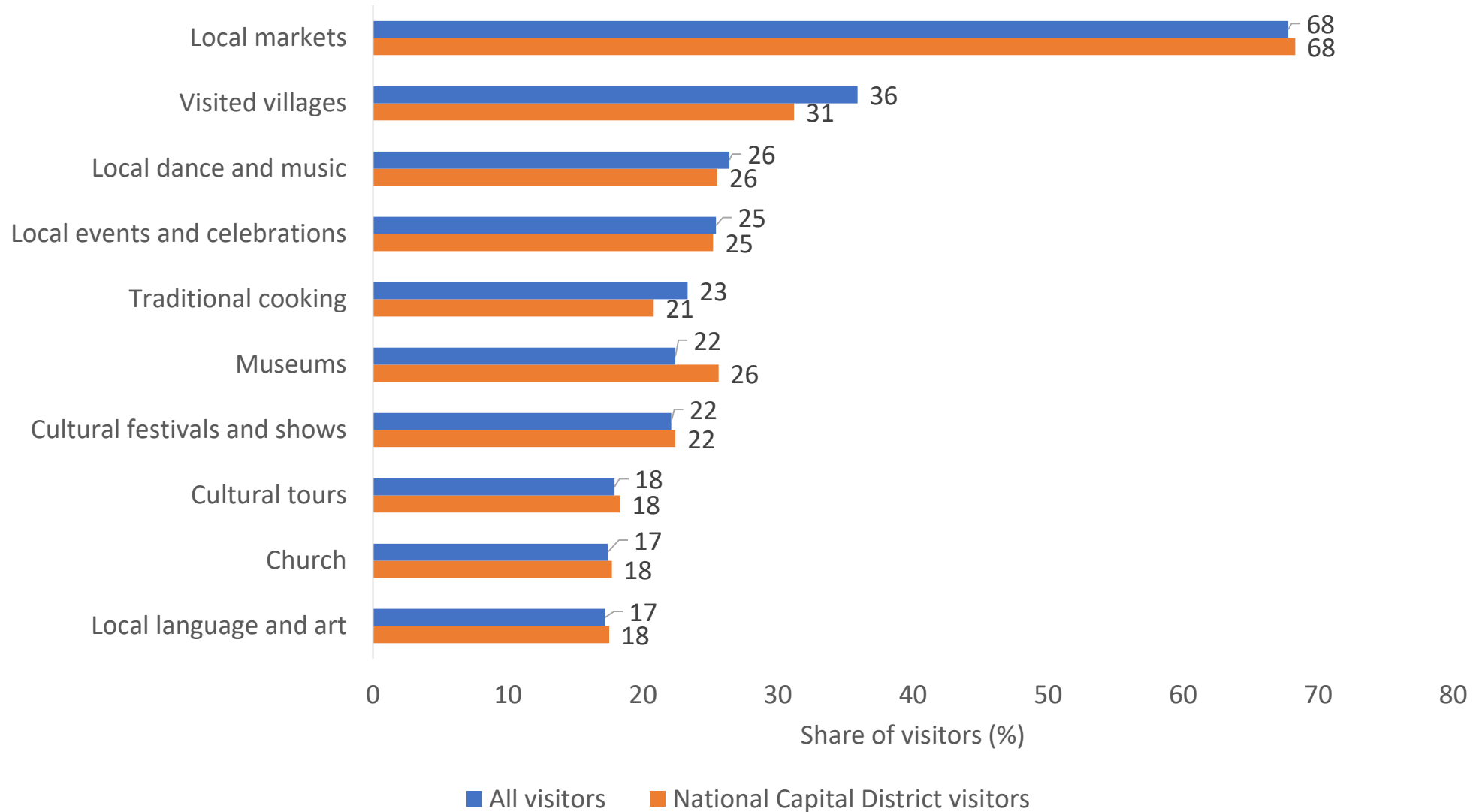
# Participation in Land Based Activities – All Visitors vs Holiday Visitors



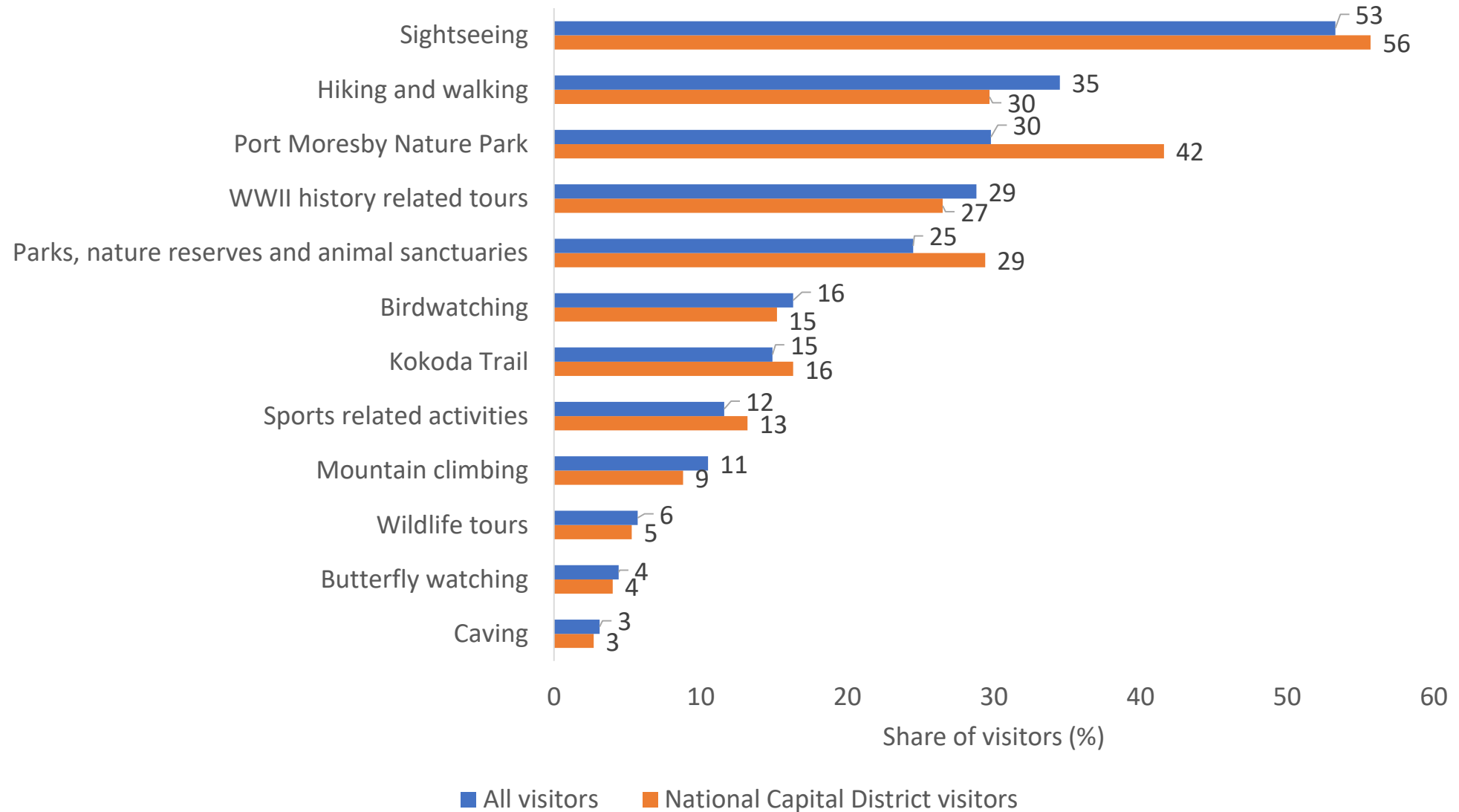
# Participation in Water Based Activities – All Visitors vs National Capital District Visitors



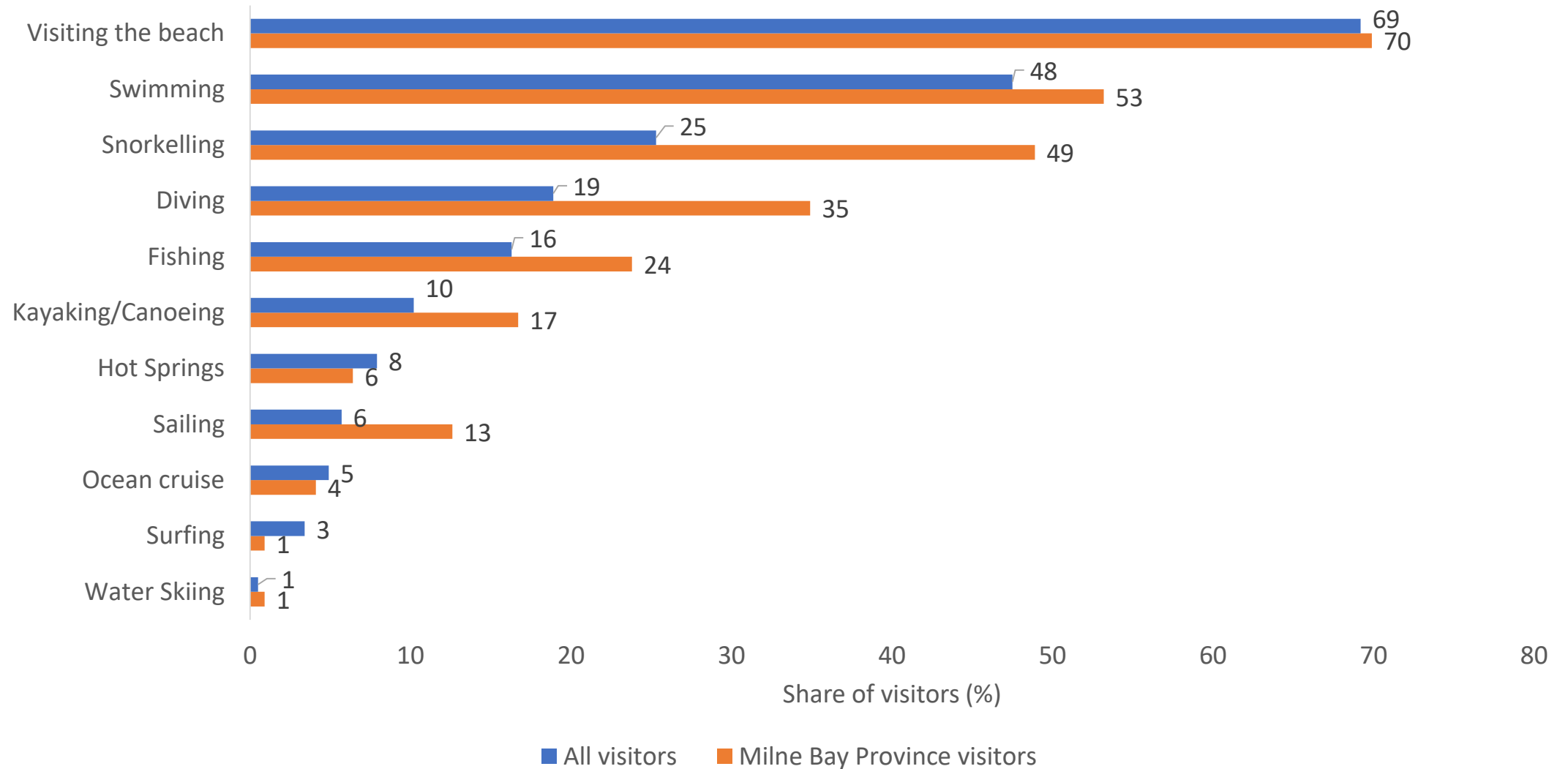
# Participation in Cultural Based Activities – All Visitors vs National Capital District Visitors



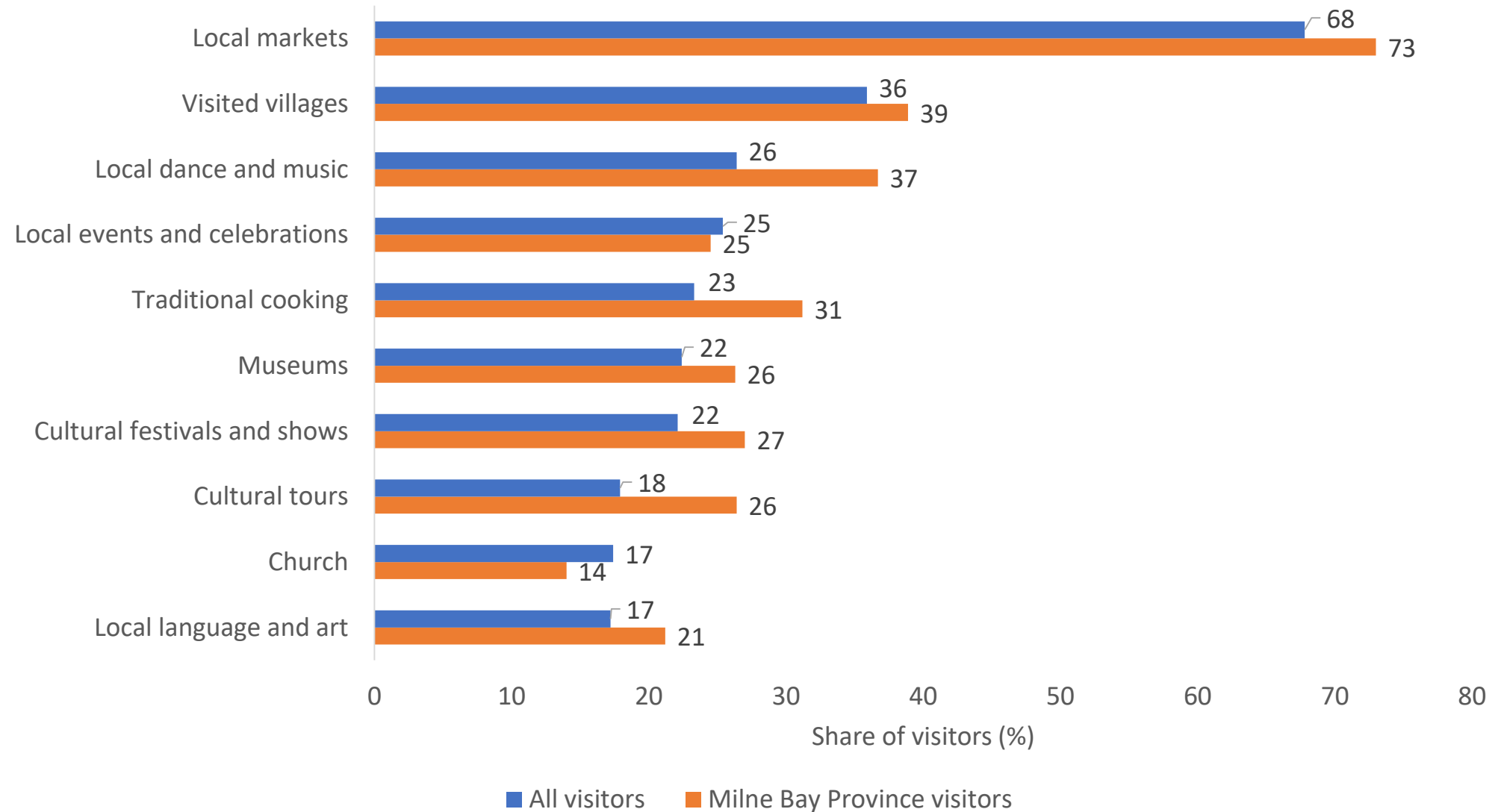
# Participation in Land Based Activities – All Visitors vs National Capital District Visitors



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

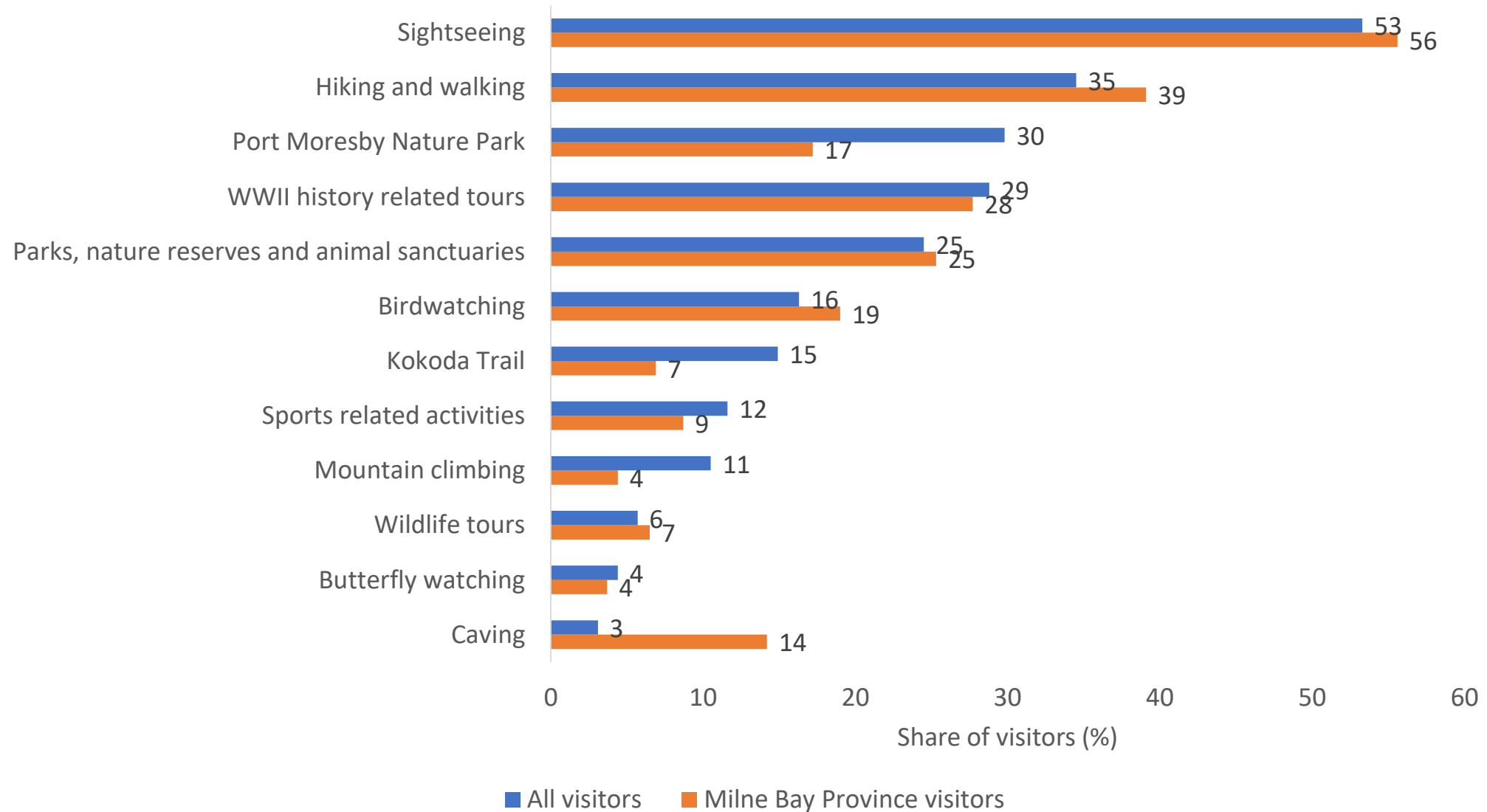


# Participation in Cultural Based Activities – All Visitors vs Milne Bay Province Visitors

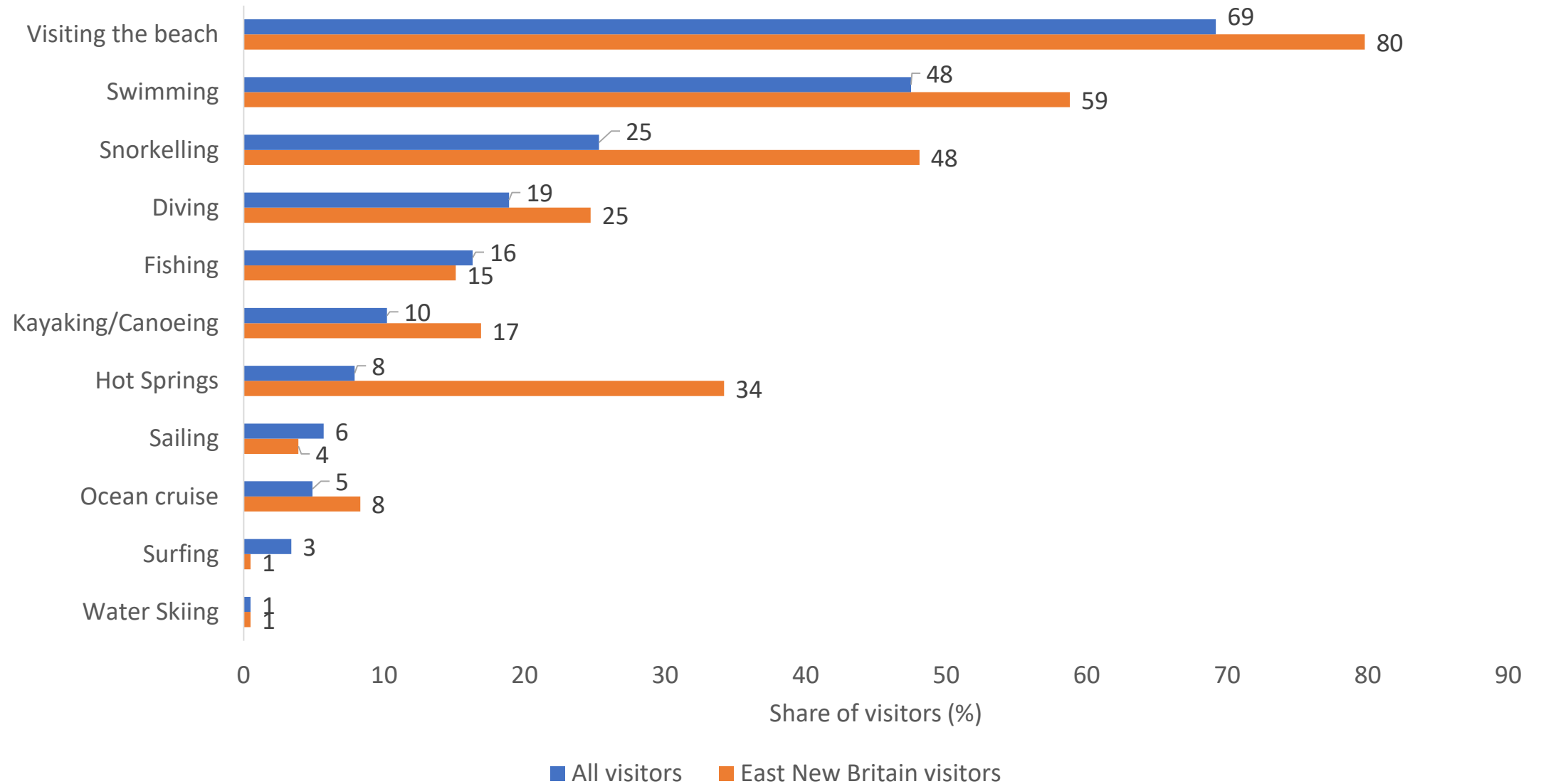




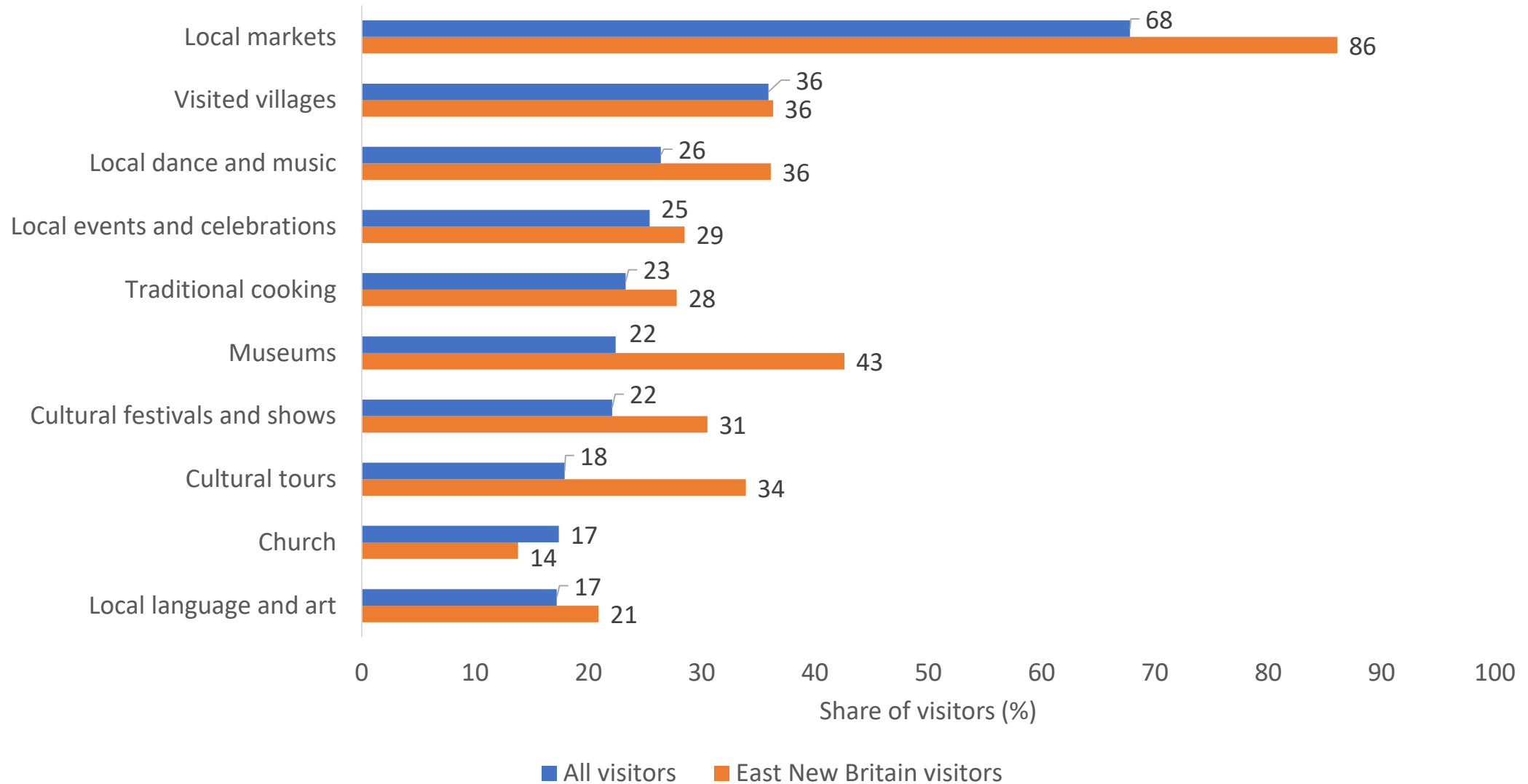
# Participation in Land Based Activities – All Visitors vs Milne Bay Province Visitors



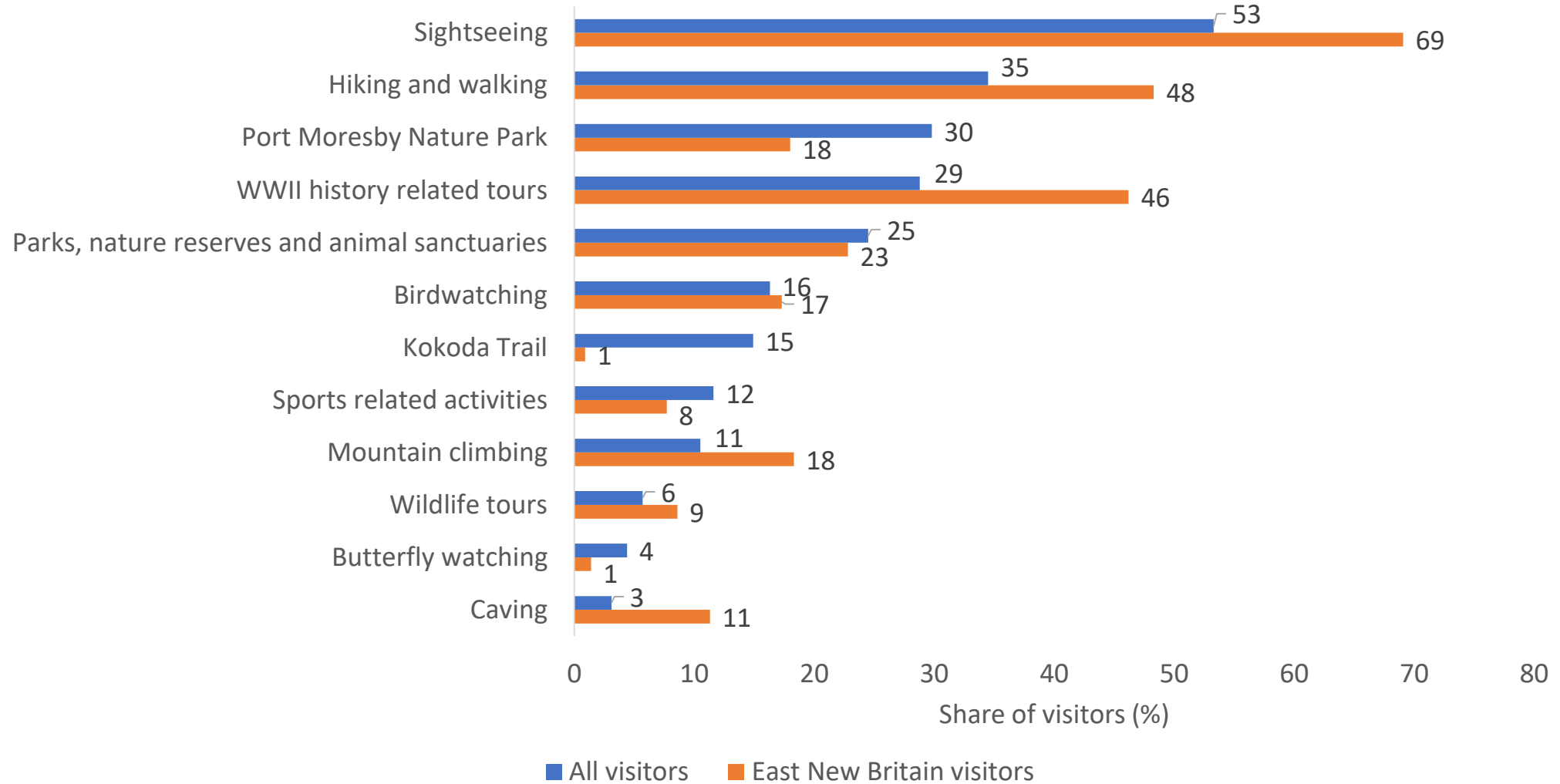
# Participation in Water Based Activities – All Visitors vs East New Britain Visitors



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



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



# 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.

