

# INTERNATIONAL VISITOR SURVEY

## EAST NEW BRITAIN and MILNE BAY

CUSTOM REPORT





Visitors to ENB and MB are staying longer and spending more than the average visitors to PNG



ENB has a strong appeal with high-spending North America, Europe and UK markets. While MB has a strong Australian market.



MB operators should consider how to increase arrivals from the Asian dive market and the UK cultural market.



ENB has an interesting solo, holiday traveler market while MB tends to draw groups. Operators in each destination should consider how to cater to different groups on price and product experience.



Key niche markets in ENB are cultural, soft adventure and historical tourism. Developing new niche activities could increase the average length of stay in the province.



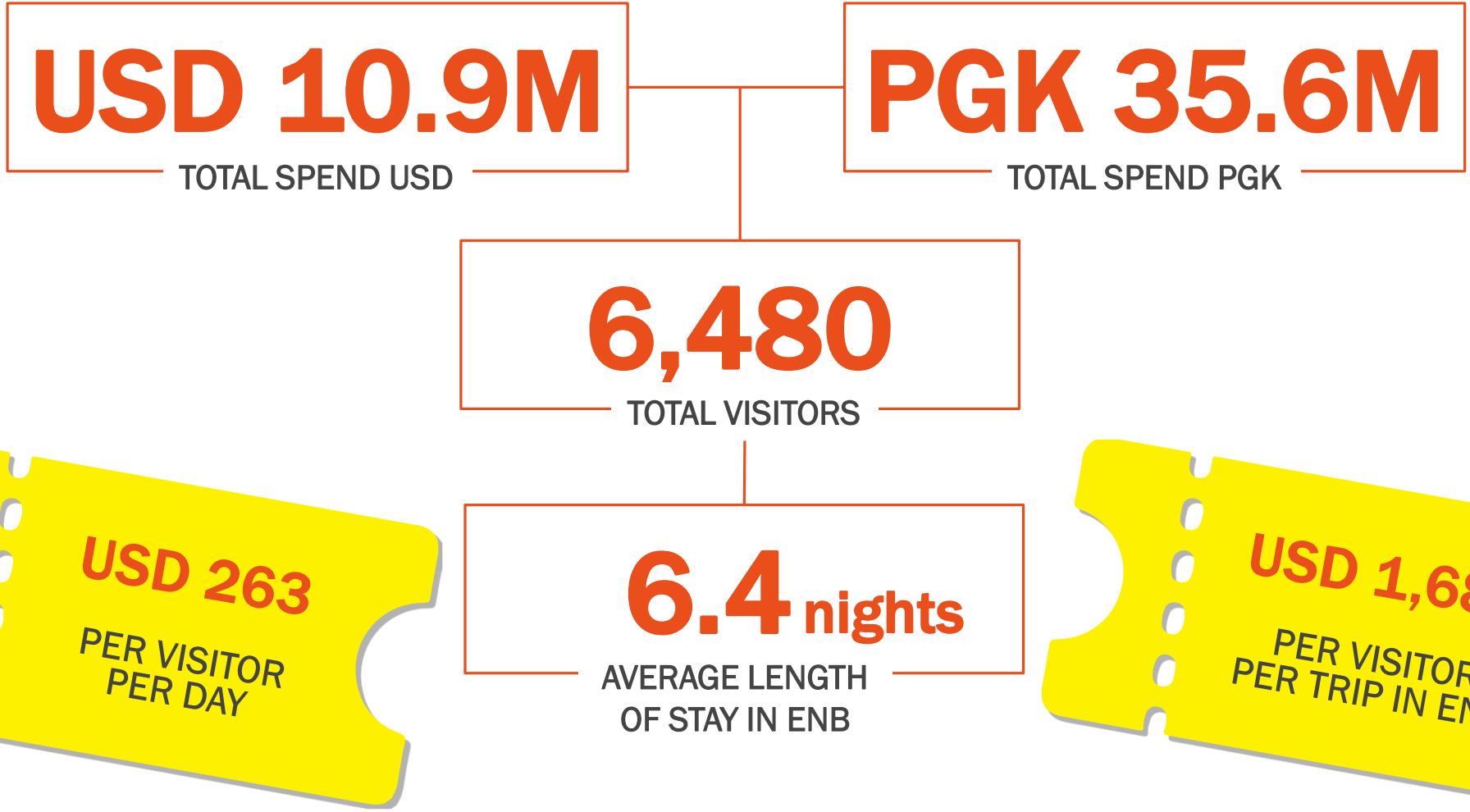
Visitors to both ENB and MB use the internet to plan and book trips. Visitors to MB also rely on traditional channels like travel agents for trip planning.



Operators in both ENB and MB should communicate with visitors before trips to prepare them for challenging travel conditions with delayed flights and poor road infrastructure as these are key issues for travelers.

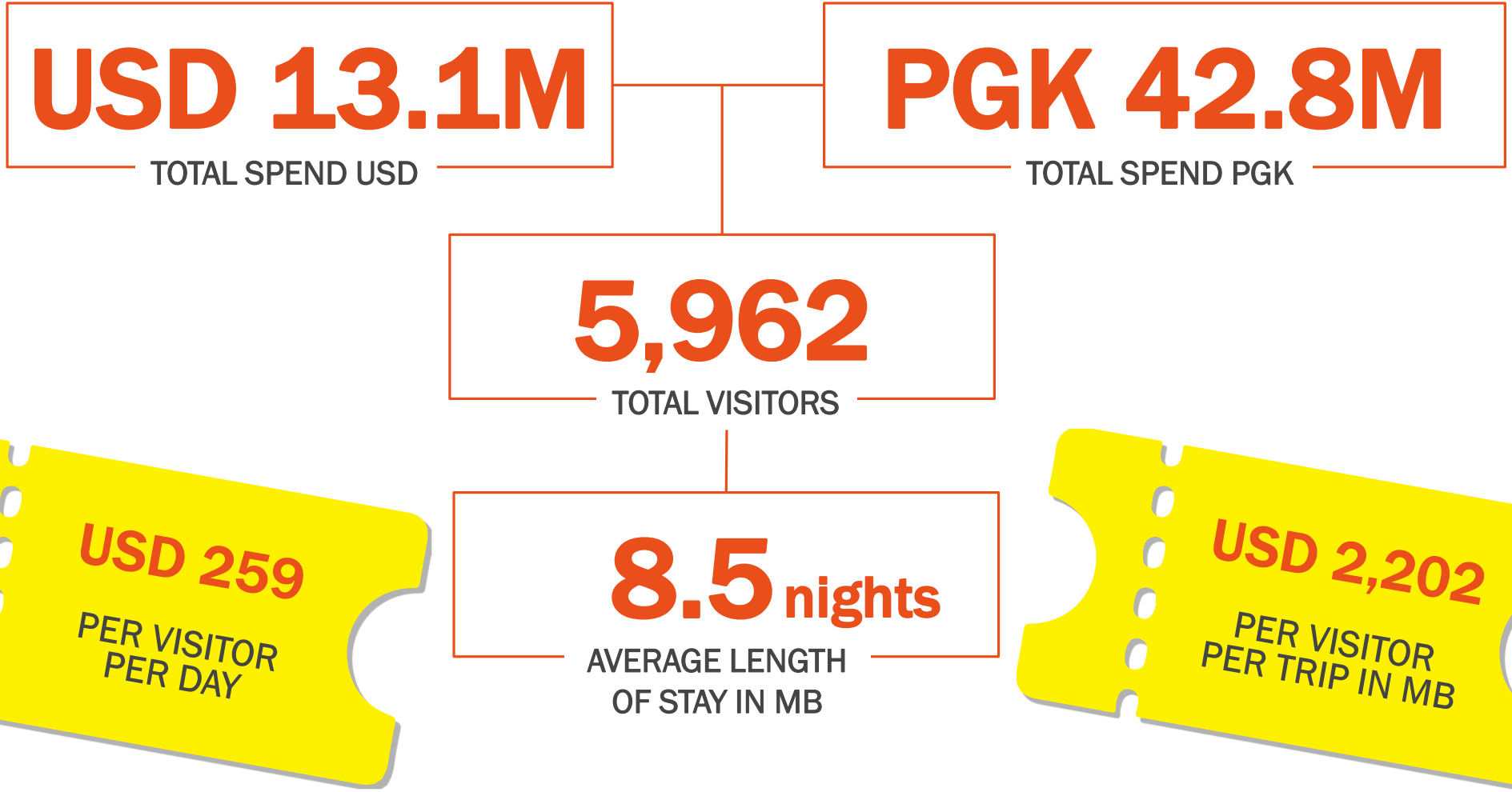


Despite challenges, satisfaction levels for both provinces are high.



In 2017, travelers that visited ENB spent 14% more per day and stayed in country 2 more days than the average visitor to PNG. Overall, they spent \$6,480 on their entire trip, almost three times as much as the average visitor to PNG.

Figures exclude employment and cruise visitors  
Weighted responses = 137



In 2017, travelers that visited MB spent 12% more per day and stayed in country 2 more days than the average visitor to PNG. Overall, they spent \$5,960 on their entire trip, 2.5 times more than the average visitor to PNG.

Figures exclude employment and cruise visitors  
Weighted responses = 129

# IVS PROVINCIAL REPORTS

## EAST NEW BRITAIN and MILNE BAY

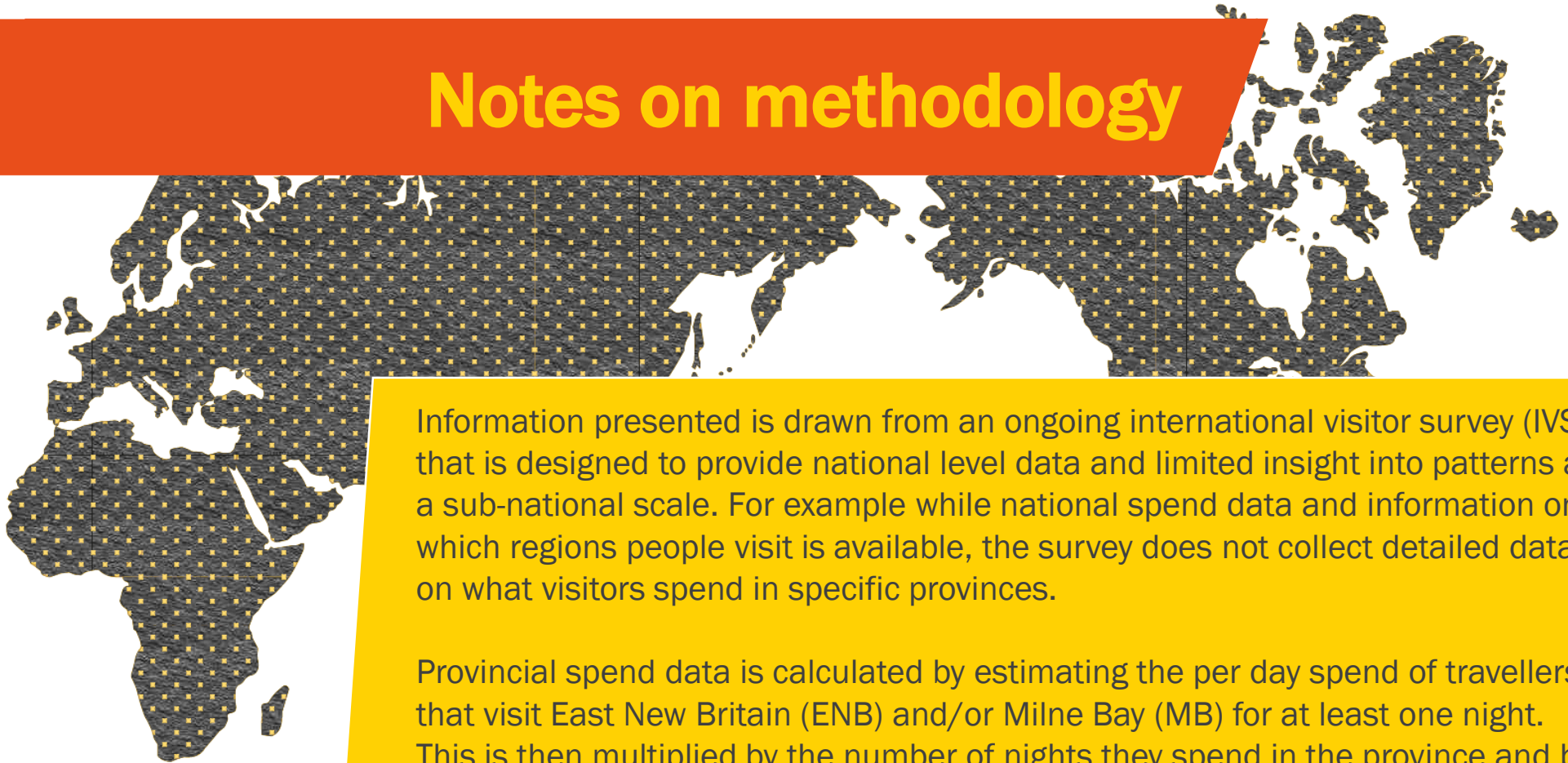
January – June 2018



**DATA FROM 6 MONTHS**



# Notes on methodology



Information presented is drawn from an ongoing international visitor survey (IVS) that is designed to provide national level data and limited insight into patterns at a sub-national scale. For example while national spend data and information on which regions people visit is available, the survey does not collect detailed data on what visitors spend in specific provinces.

Provincial spend data is calculated by estimating the per day spend of travellers that visit East New Britain (ENB) and/or Milne Bay (MB) for at least one night. This is then multiplied by the number of nights they spend in the province and by the number of visitors to each province to determine overall spend. The analysis assumes that visitors that travel to ENB and/or MB will spend the same amount of money every day of their trip to PNG regardless of specific destinations.

Figures are based on small sample sizes, therefore caution is urged in using this material for decision making. To avoid skewing the data set with outlying data any respondent who stays more than 31 nights was removed from the analysis.

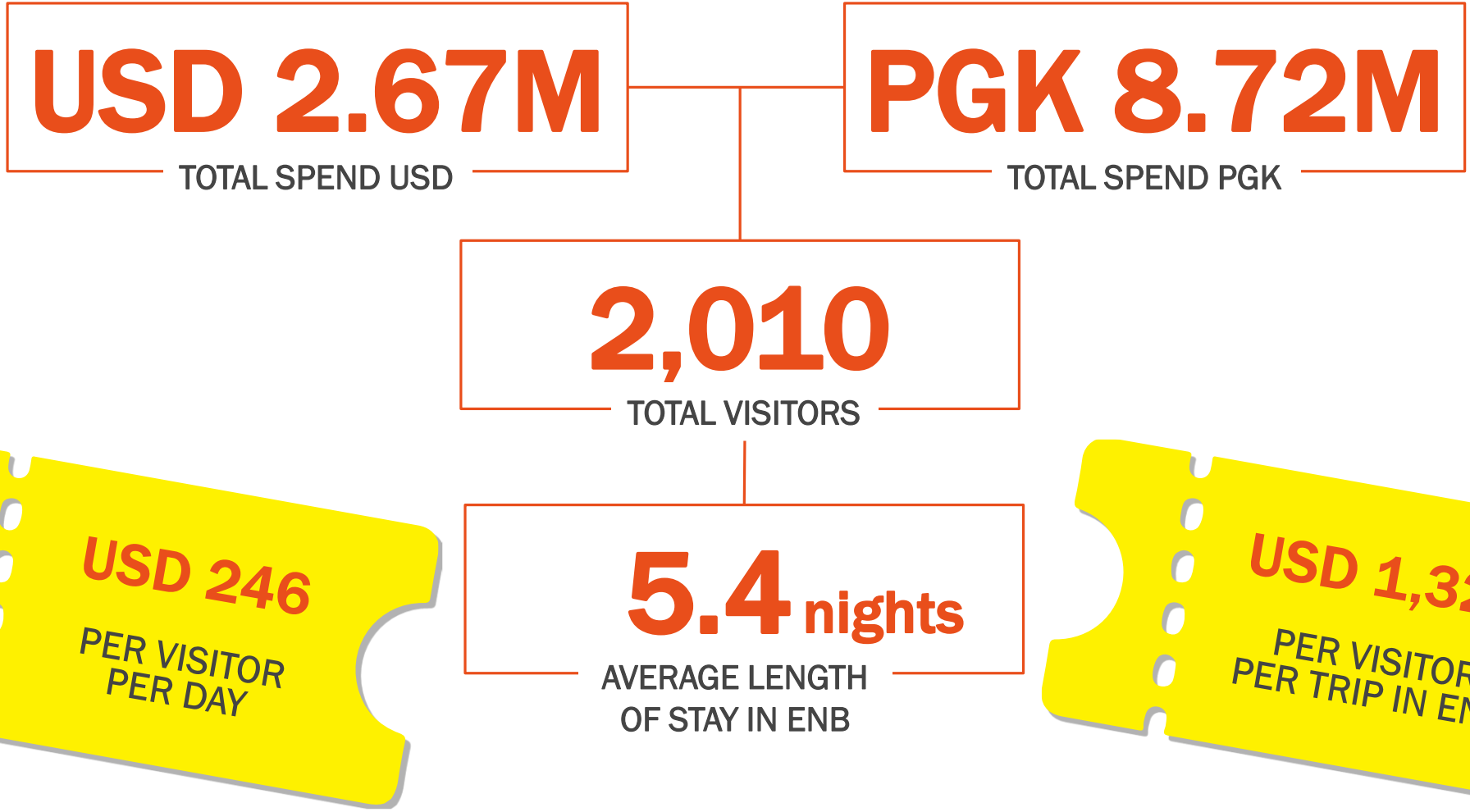
# INTERNATIONAL VISITOR SURVEY

## EAST NEW BRITAIN

JANUARY – JUNE 2018



DATA FROM 6 MONTHS



In the first 6 months of 2018, travelers that visited ENB spent 4% more per day and stayed in country 2.3 more days than the average visitor to PNG. Overall, they spent \$2,930 on their entire trip, 30% more than the average visitor to PNG.

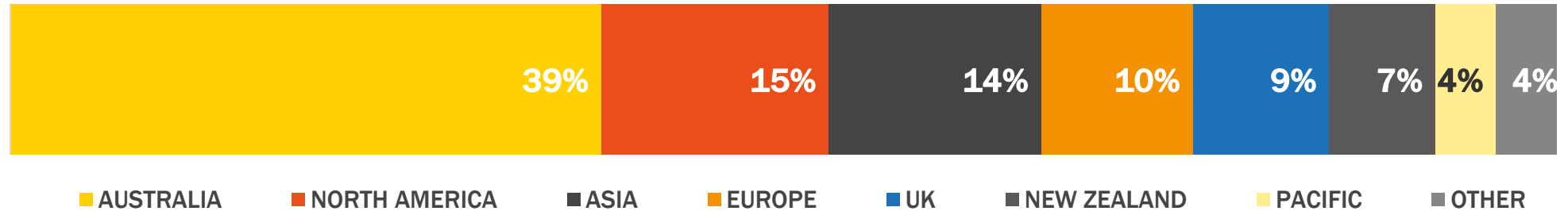
Figures exclude employment and cruise visitors  
Responses include those that visited ENB for at least one night. Weighted responses = 54



# TOTAL VISITORS BY MARKET ENB

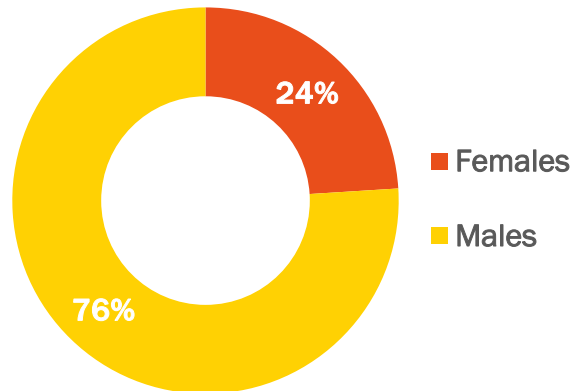
JAN - JUN 2018 TOTAL VISITORS

TOTAL VISITORS (%) BY MARKET

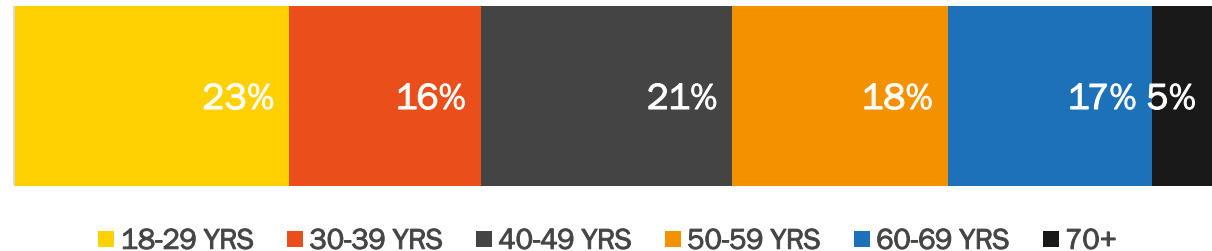


# DEMOGRAPHICS OF VISITORS TO ENB

GENDER



AGE



ENB has specific appeal for long haul markets. Visitors from North America and Europe/UK make up 34% of ENB visitors versus 14% at the national level. The high percentage of male visitors is likely due to the strong business market.

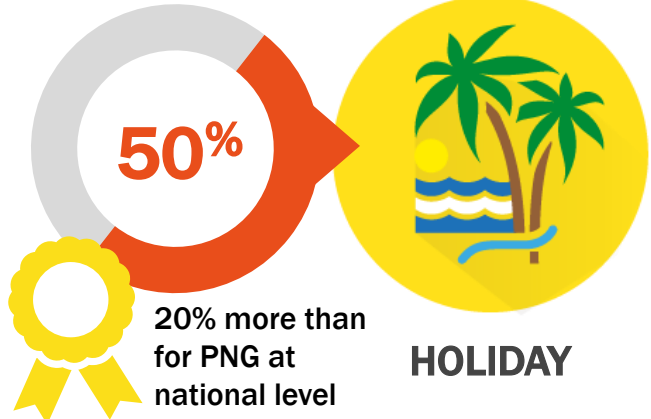
Responses include those that visited ENB for at least one night.

# PURPOSE OF VISIT ENB

# JAN - JUN 2018 TOTAL VISITORS

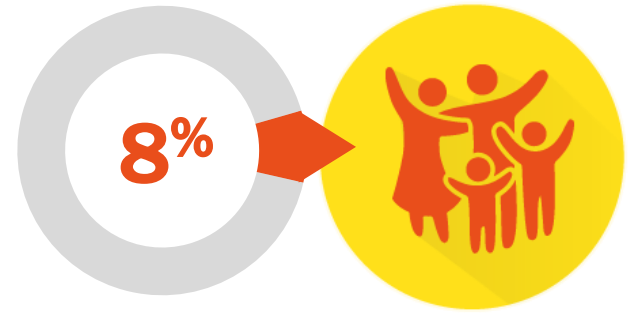


**BUSINESS**



20% more than for PNG at national level

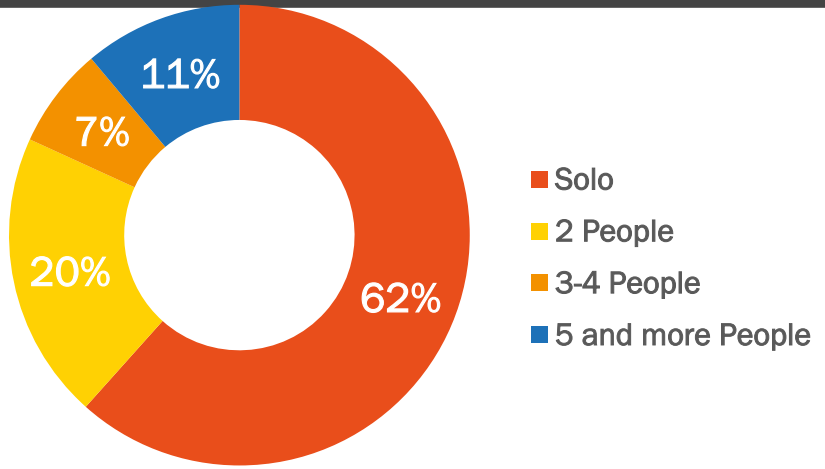
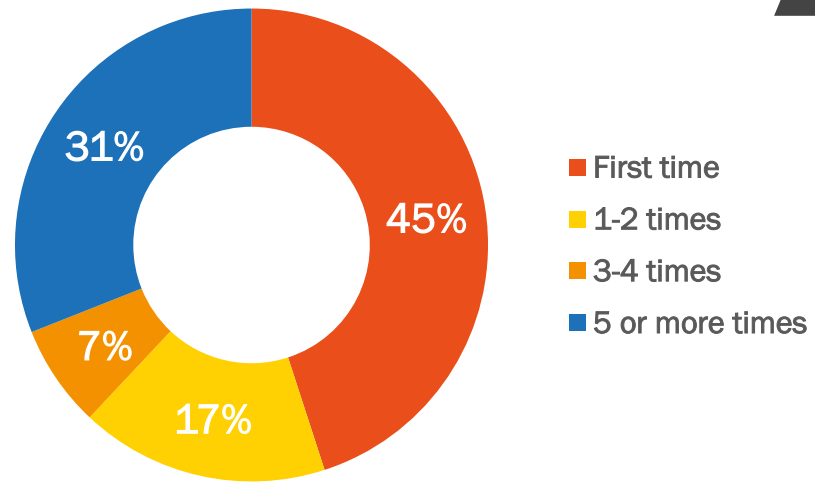
**HOLIDAY**



**VISITING FRIENDS & RELATIVES**

# NUMBER OF VISITS TO PNG

# GROUP SIZE



ENB has a high percentage of solo travelers. With lower levels of business travel to ENB, this points to solo holiday visitors. Businesses should consider how to better serve solo travelers for price competitiveness and activities.

Responses include those that visited ENB for at least one night.

# TOWNS VISITED IN ENB

# JAN – JUN 2018 TOTAL VISITORS

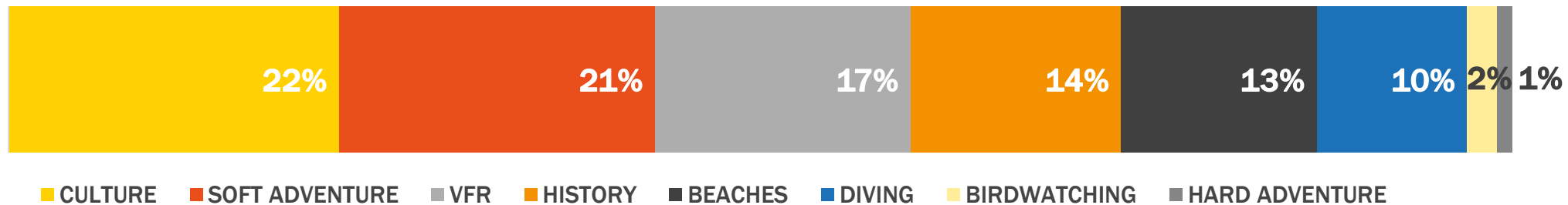


1. Rabaul (90%)
2. Kokopo (81%)
3. Rabaul North Coast & Islands (32%)
4. Duke of York Islands (12%)
5. Baining (12%)

## AVERAGE LENGTH OF STAY IN ENB



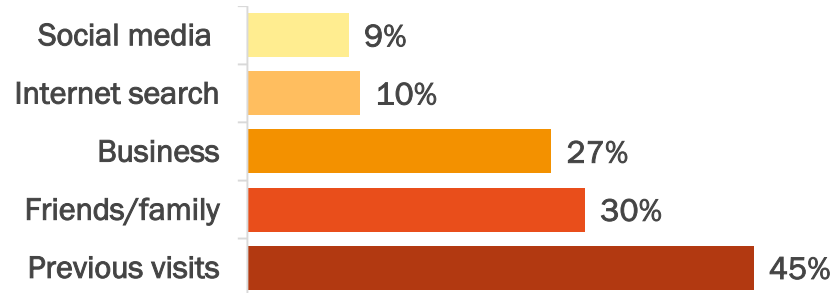
## NICHE MARKETS: PRIMARY REASON FOR HOLIDAY VISITS TO PNG



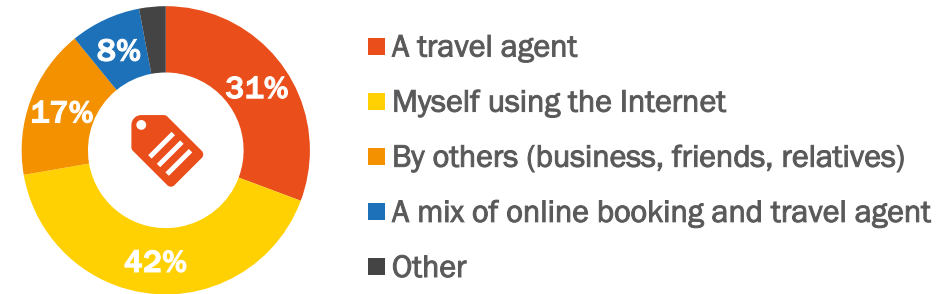
Most visitors spend time in Rabaul and Kokopo. Operators in towns farther afield should consider developing niche products to draw more visitors. Cultural, soft adventure and historical experiences are top draws for travelers that visit ENB. More activities could increase the average length of stay in the province.

Responses include those that visited ENB for at least one night.

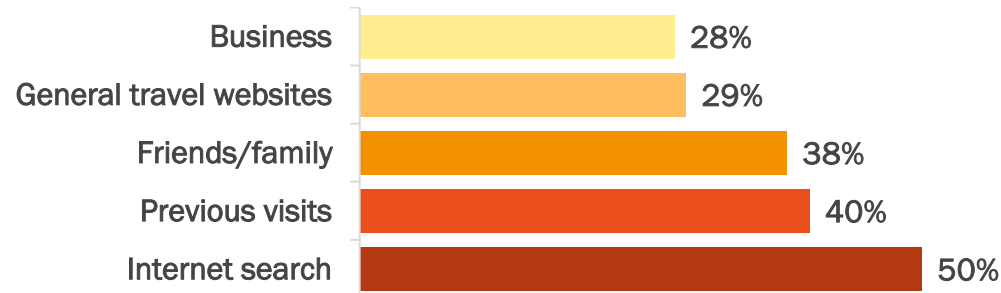
## HOW DID YOU FIND OUT ABOUT PNG? TOP 5 OPTIONS



## HOW DID YOU PURCHASE YOUR TRAVEL?

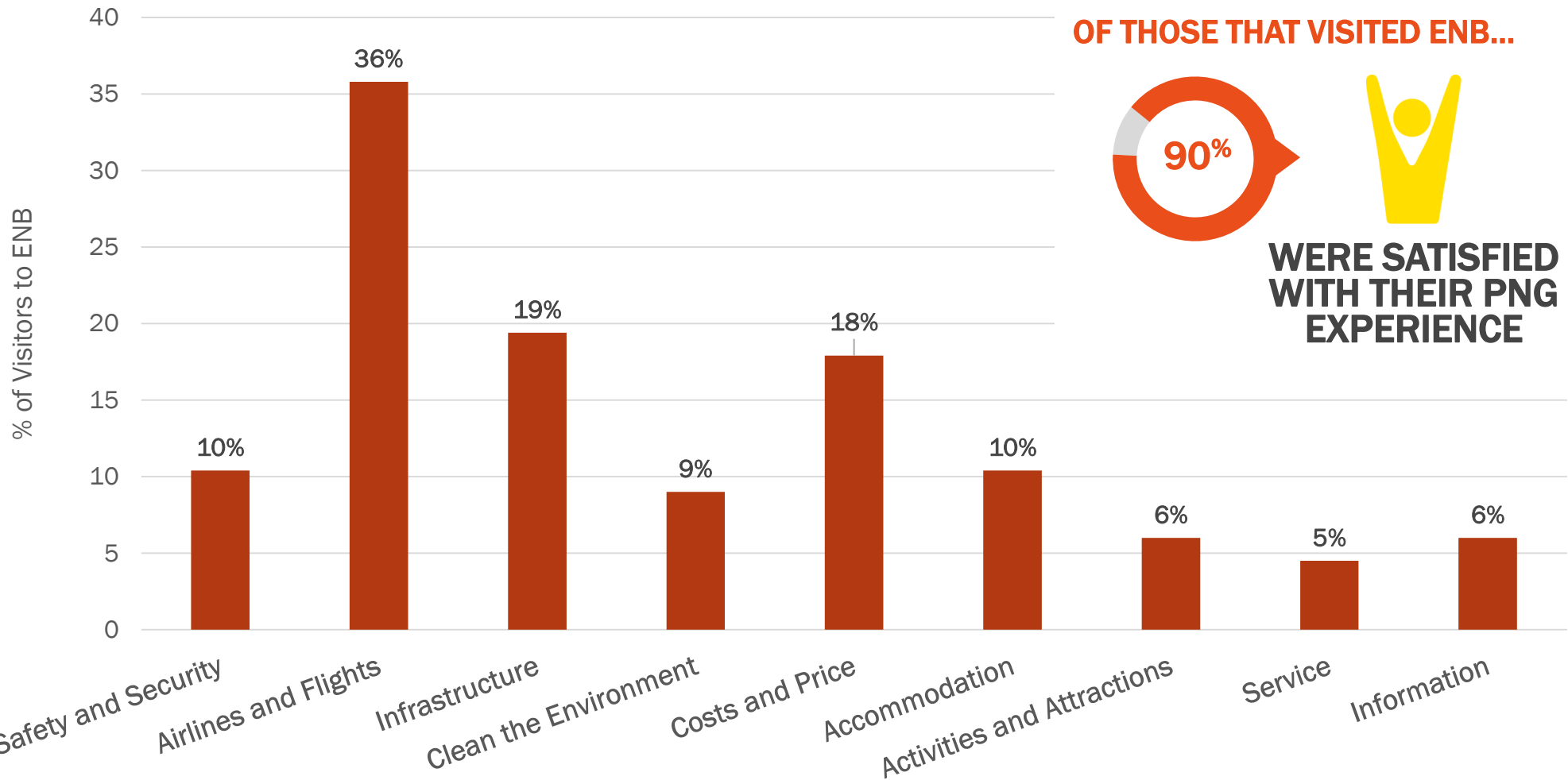


## INFORMATION SOURCES USED FOR PLANNING. TOP 5



While visitors to ENB are not being reached by destination awareness campaigns, they do rely on the internet for trip planning and booking. Operators in ENB should ensure they have a strong web presence and online booking platforms to meet visitor needs.

Responses include those that visited ENB for at least one night. Multiple responses, therefore totals do not add up to 100%



OF THOSE THAT VISITED ENB...



**WERE SATISFIED  
WITH THEIR PNG  
EXPERIENCE**

ENB's biggest challenges are airlines/flights, infrastructure, and costs. Operators should consider how they can provide more information to guests to prepare them for challenging travel conditions and how to create experiences that offer value for money. Despite challenges, visitors still have high levels of satisfaction.

Responses include those that visited ENB for at least one night. Multiple responses, therefore totals do not add up to 100%

# INTERNATIONAL VISITOR SURVEY

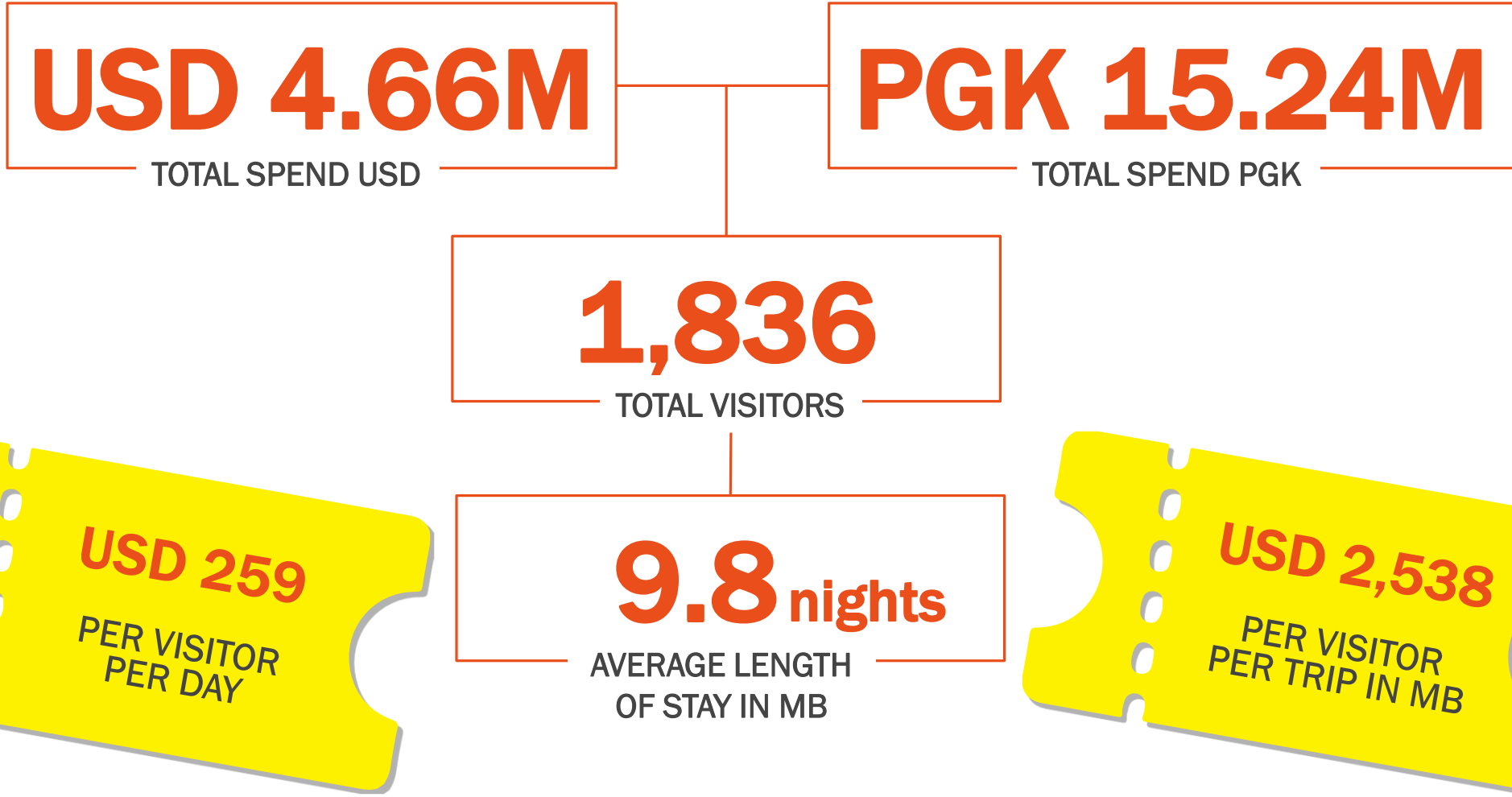
## MILNE BAY

JANUARY – JUNE 2018



DATA FROM 6 MONTHS





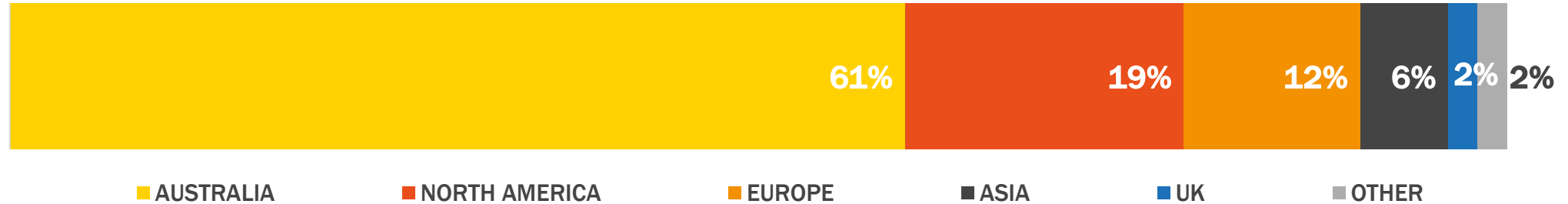
In the first 6 months of 2018, travelers that visited MB spent 10% more per day and stayed in country 3 more days than the average visitor to PNG. Overall, they spent \$3,260 on their entire trip, 45% more than the average visitor to PNG.

Figures exclude employment and cruise visitors  
Responses include those that visited MB for at least one night. Weighted responses = 49

# TOTAL VISITORS BY MARKET

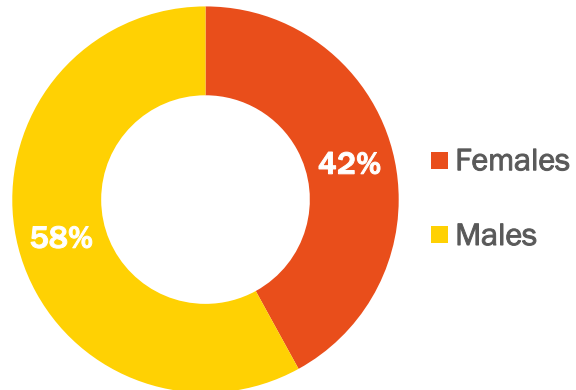
## JAN - JUN 2018 TOTAL VISITORS

### TOTAL VISITORS (%) BY MARKET

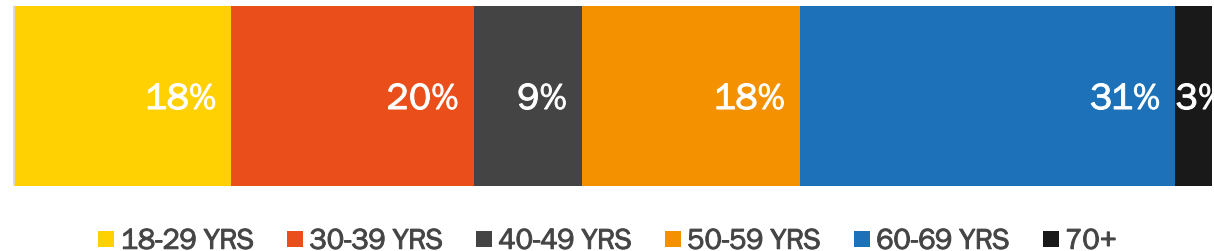


# DEMOGRAPHICS OF VISITORS TO MB

### GENDER



### AGE



MB has a strong Australian market as well as good appeal with North Americans and Europeans. More than 50% of visitors to MB are over the age of 50. Operators should look for ways to attract more Asians and UK visitors, particularly for diving, and consider the needs of older and more wealthy tourists in product development.

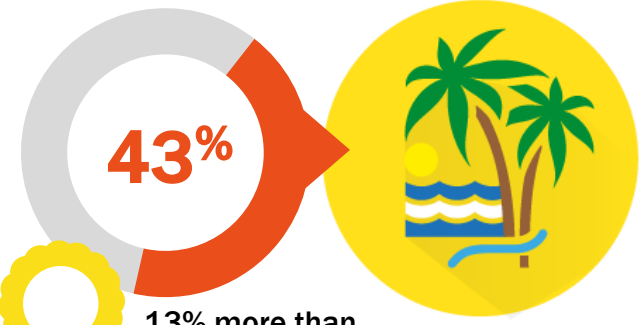
Responses include those that visited MB for at least one night.

# PURPOSE OF VISIT

# JAN - JUN 2018 TOTAL VISITORS

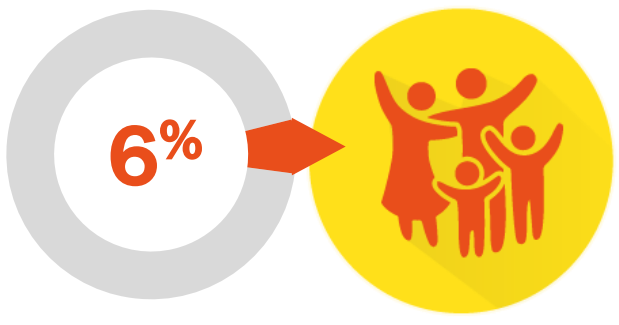


**BUSINESS**



**HOLIDAY**

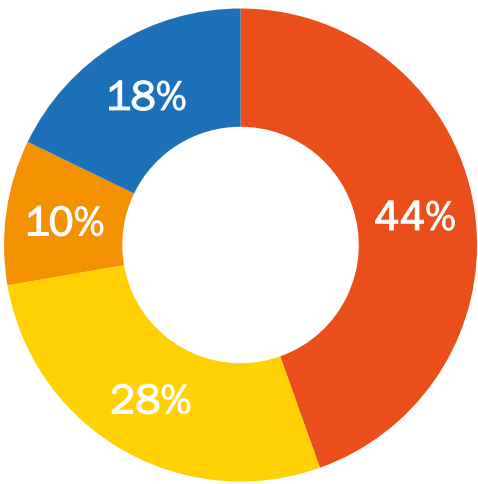
**13% more than for PNG at national level**



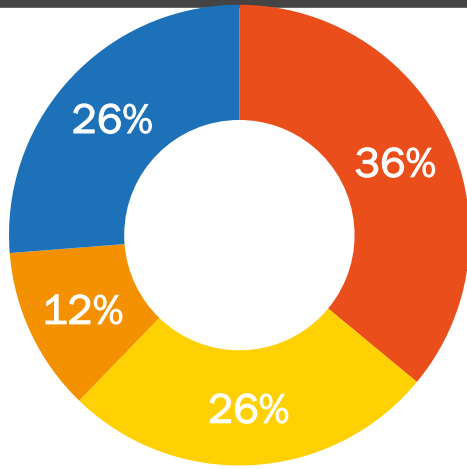
**VISITING FRIENDS & RELATIVES**

# NUMBER OF VISITS TO PNG

# GROUP SIZE



- First time
- 1-2 times
- 3-4 times
- 5 or more times



- Solo
- 2 People
- 3-4 People
- 5 and more People

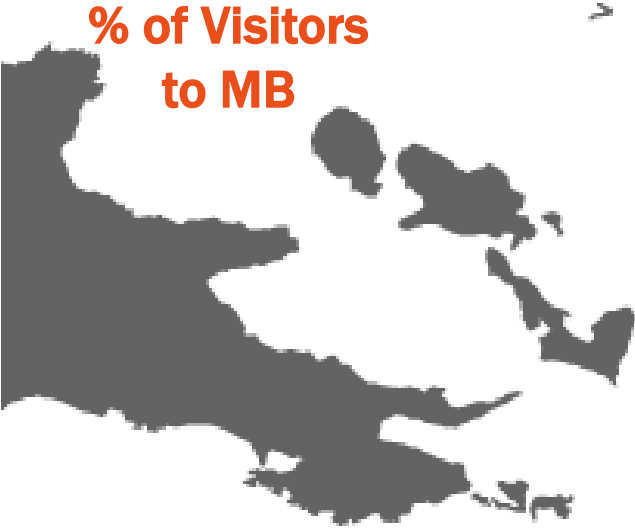
Over 60% of visitors to MB are coming in as a couple or group, with 26% visiting in a group of 5 or more. Operators should consider how to cater to these larger groups in terms of accommodation investment, pricing, and product experiences.

Responses include those that visited MB for at least one night.

# TOWNS VISITED IN MB

# JAN – JUN 2018 TOTAL VISITORS

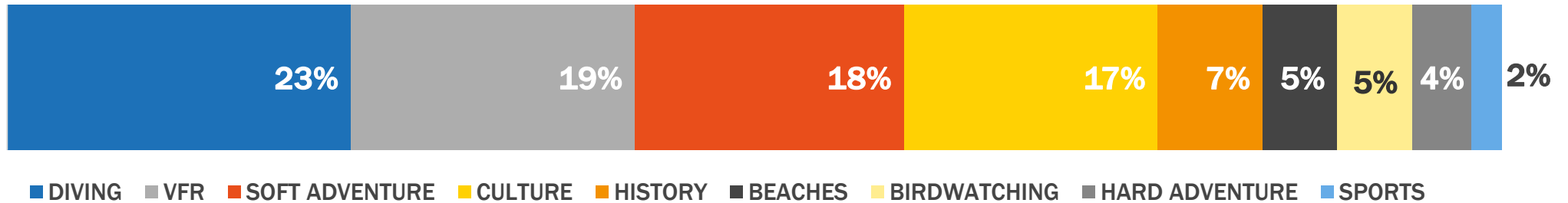
**% of Visitors to MB**



- 79%** 1. Alotau
- 21%** 2. D'Entrecasteaux Islands
- 14%** 3. Samarai

- 9%** 4. Conflict Islands
- 8%** 5. Kwato, Deka Deka Islands, Logea, Saliba, Basilaki, Doini and Sideia
- 7%** 6. Engineer Islands
- 6%** 7. Louisiade Archipelago
- 2%** 8. Trobriand Islands
- 2%** 9. Woodlark Island

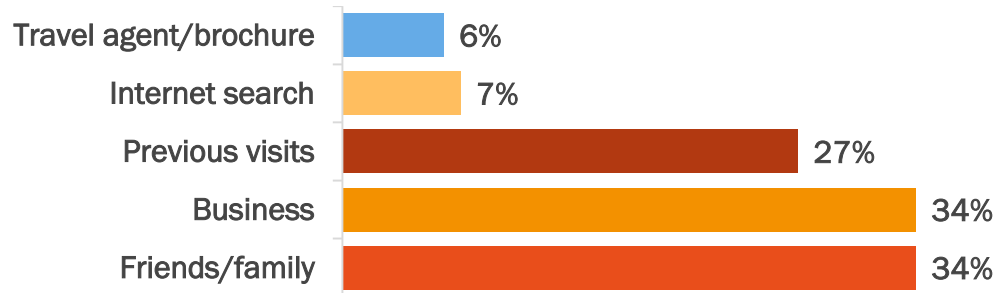
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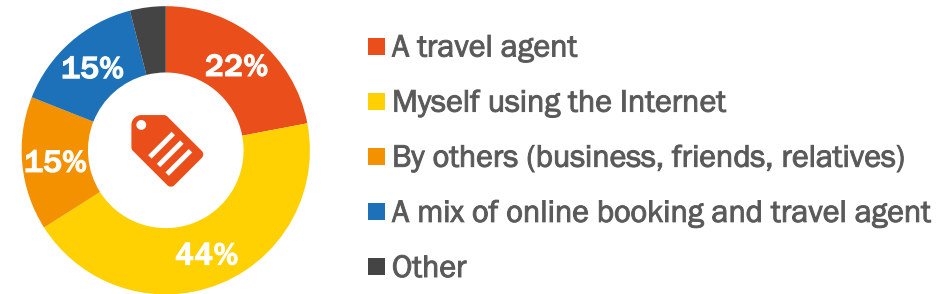
There are lower levels of tourists visiting destinations outside of Alotau. Operators in other areas should look at how to leverage the strong dive market or develop alternative products that focus on soft adventure and cultural experiences to attract more visitors.

Responses include those that visited MB for at least one night. Multiple responses, therefore totals do not add up to 100%

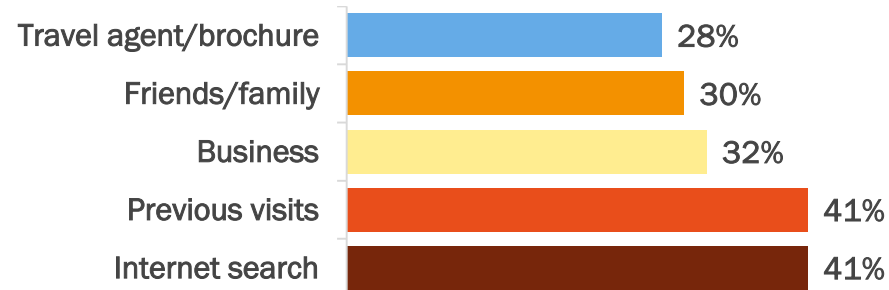
### HOW DID YOU FIND OUT ABOUT PNG? TOP 5 OPTIONS



### HOW DID YOU PURCHASE YOUR TRAVEL?

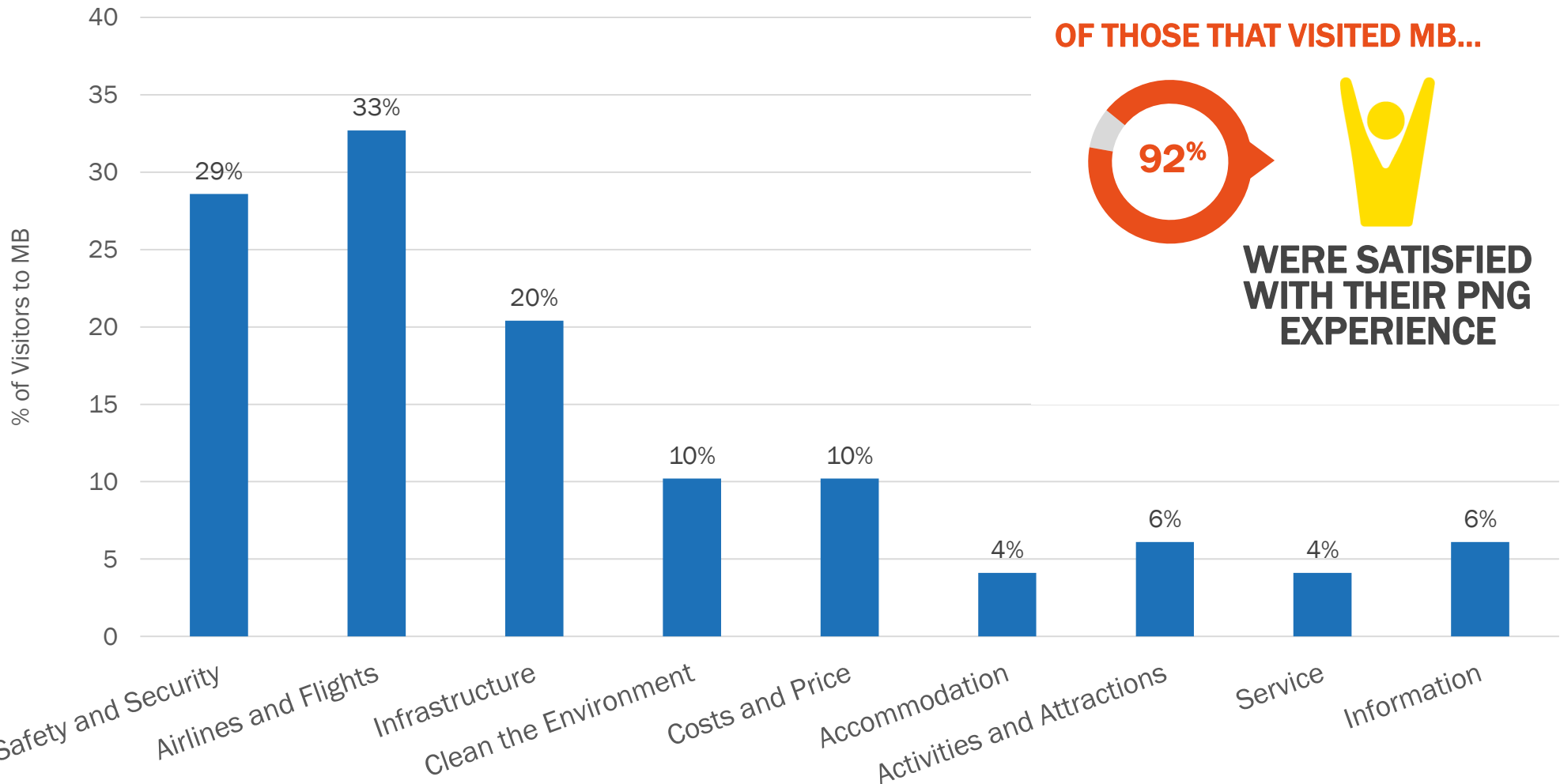


### INFORMATION SOURCES USED FOR PLANNING. TOP 5

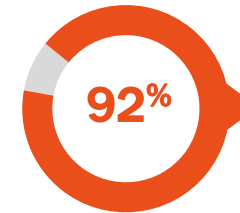


Visitors to MB are using travel agents for destination selection and trip planning more than other provinces, but still rely on the internet to book. MB operators should employ a mixture of traditional marketing with agents and online sales with web-based booking platforms.

Responses include those that visited MB for at least one night. Multiple responses, therefore totals do not add up to 100%



OF THOSE THAT VISITED MB...



**WERE SATISFIED  
WITH THEIR PNG  
EXPERIENCE**

MB's biggest challenges are airlines/flights, safety/security, and infrastructure. Operators should communicate early and often with potential tourists to provide information on security precautions, destination safety, and challenging travel conditions. Despite challenges, visitors still have high levels of satisfaction.

Responses include those that visited MB for at least one night. Multiple responses, therefore totals do not add up to 100%





**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.

