

INTERNATIONAL VISITOR SURVEY

PAPUA NEW GUINEA

Jan – Jun 2019



January – June 2019 6 Month Results
Published: September 2019



Objective

1

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

Objective

2

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

Objective

3

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

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

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



IMPORTANCE OF THE INTERNATIONAL VISITOR SURVEY (IVS)



Provides unique insight to current tourism markets.



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



Presents profiles of current visitors.



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



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



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



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

A world map with a dark grey, dotted texture on a yellow background. The continent of Australia is highlighted in a solid red color. A red banner is positioned across the top of the map.

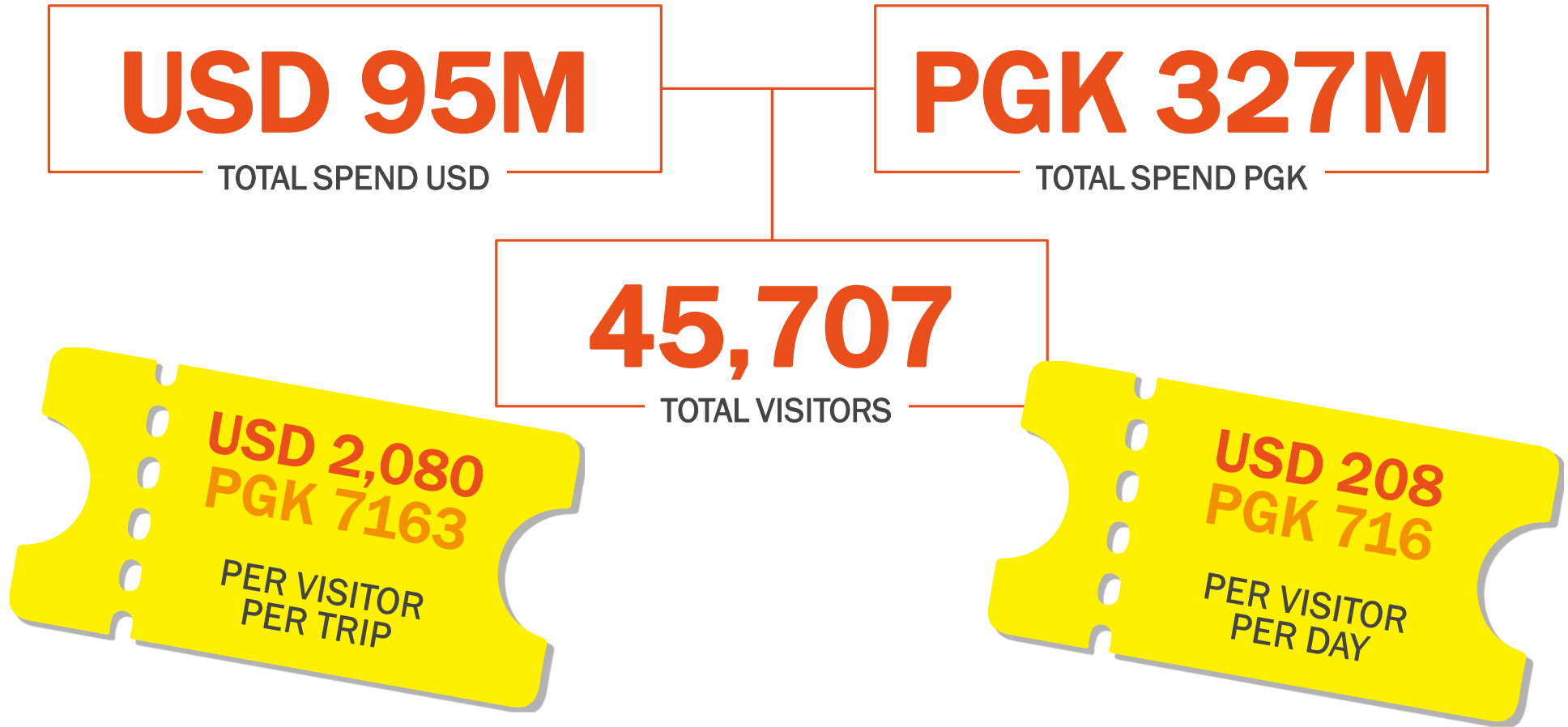
INTERNATIONAL VISITOR SURVEY

TOTAL VISITOR DATA

JANUARY 2019 – JUNE 2019



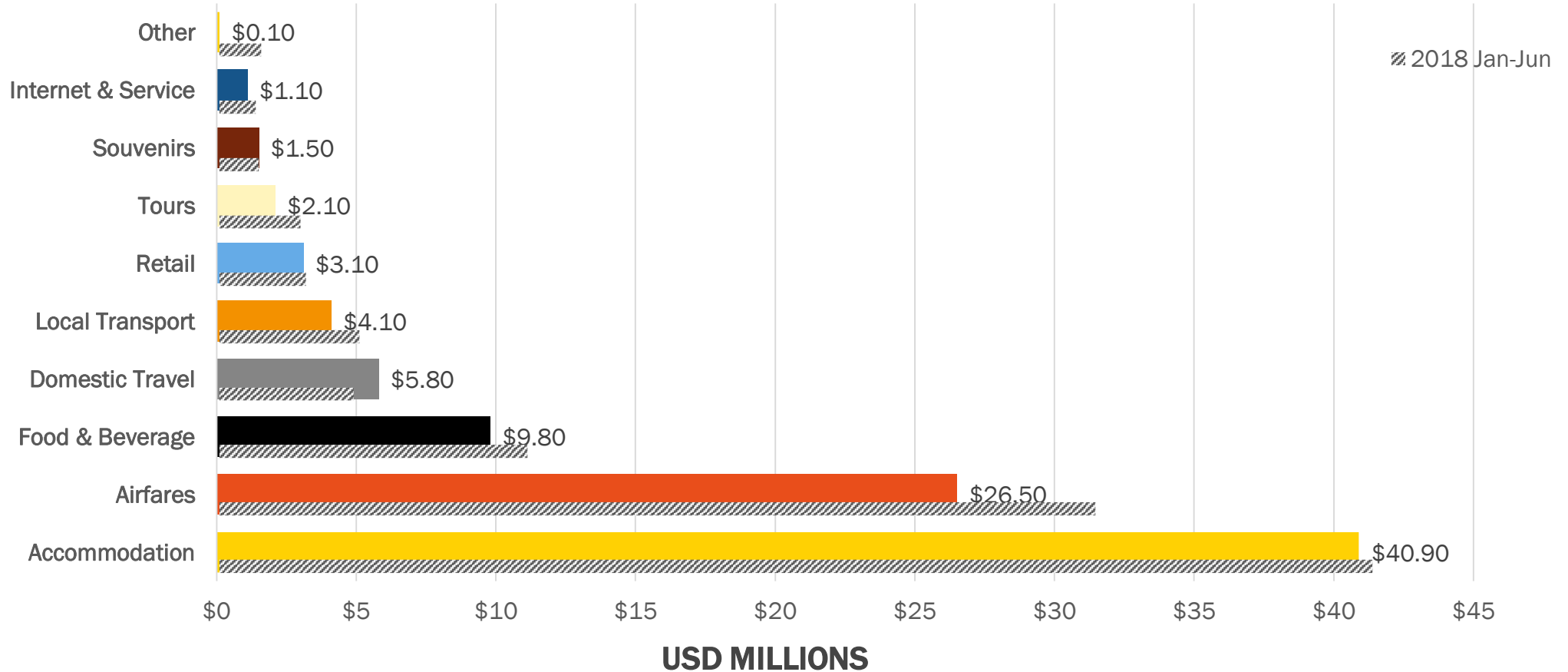
DATA FROM 6 MONTHS



In the first half of 2019, PNG's arrivals numbers remained fairly consistent with the previous year. However, visitor spend per day decreased slightly, impacting spend per trip. While spend per day decreased for business travelers and holiday markets slightly, spend per day for the visiting friends and relatives market increased.

Figures exclude employment and cruise visitors
Decrease based on same period last year.

SPEND IN COUNTRY AND PRIOR TO ARRIVAL



Light gray bars represent 2018 January - June spend in same categories

Spend patterns are similar between 2018 and 2019 for the same period. A lower spend on airfares has translated to a slightly more spend in country and prior to arrival on domestic travel and spend in country on souvenirs, which are important links to the local economy.

TOTAL VISITORS BY MARKET

JANUARY – JUNE 2019 TOTAL VISITORS

TOTAL VISITORS (%) BY MARKET



■ AUSTRALIA ■ SOUTHEAST ASIA ■ NORTHEAST ASIA ■ EUROPE ■ NORTH AMERICA ■ NEW ZEALAND ■ OTHER ASIA ■ PACIFIC ■ OTHER

PURPOSE OF VISIT

SPEND PER PERSON PER TRIP



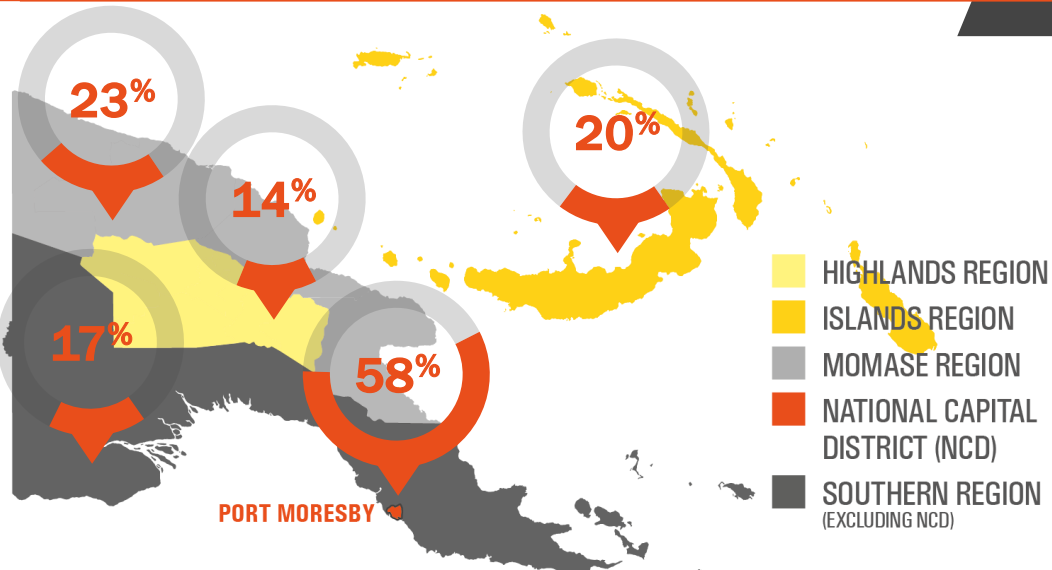
Australia continues to be the most important market for PNG with almost half of total arrivals. Business travelers and holiday markets also remain the most important markets making up 54% and 29% of total arrivals, respectively.

Figures exclude employment and cruise visitors

Due to rounding, some figures do not add up to 100%.

REGIONS VISITED & VISITOR SATISFACTION

JANUARY – JUNE 2019 TOTAL VISITORS



TOTAL VISITATION TO THE PROVINCES



Strong visitation to provinces and robust satisfaction rates continue in 2019. Central Province ranked among the top visited provinces outside of NCD, due to the popularity of the Kokoda Trail. Tourism hubs of East New Britain and Madang are also popular.

A world map with a dark grey, dotted texture is set against a bright yellow background. A red dot is placed on the map, specifically over the island of Sumatra in Southeast Asia. A red banner is positioned across the top of the map, and a yellow banner is positioned across the middle. A circular icon on the right side of the map depicts a tropical beach scene with palm trees, a sun, and waves.

INTERNATIONAL VISITOR SURVEY

HOLIDAY MARKET PROFILES

JULY 2017 – JUNE 2019

DATA FROM 2 YEARS

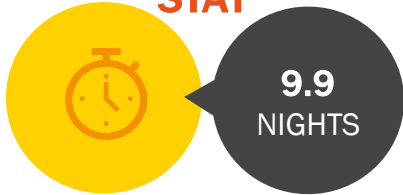


JUL 2017 – JUN 2019

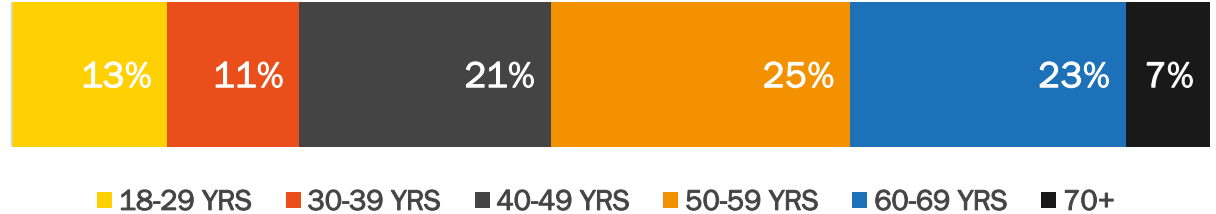
AUSTRALIA



AVERAGE LENGTH OF STAY



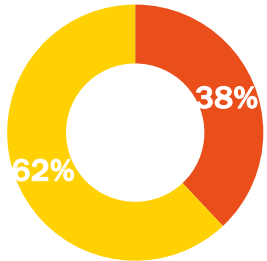
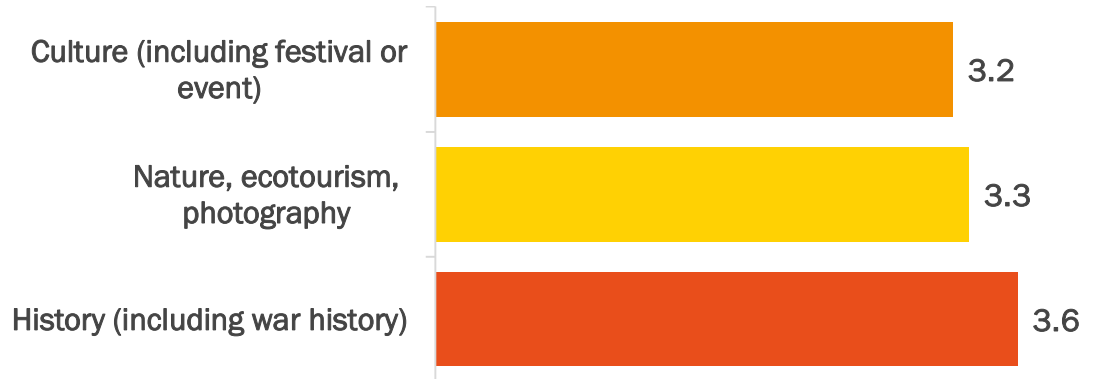
AGE



SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males



WERE SATISFIED

Australia remains the top source holiday market for PNG. The market remains consistent with mostly mature male visitors between the ages of 40 and 70 years. Visitors have a lower spend per trip than the average holiday traveler. They are generally motivated by historical, nature based and cultural experiences.

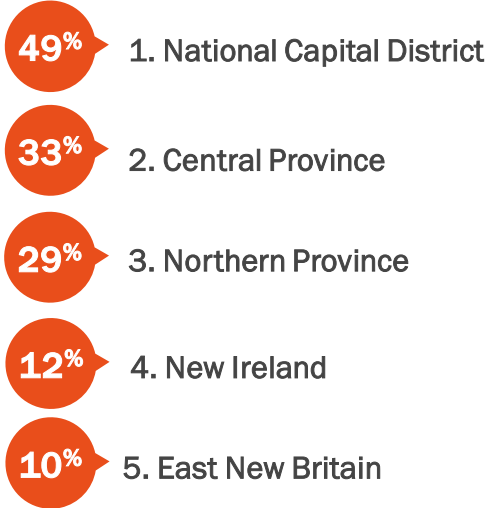


JUL 2017 – JUN 2019

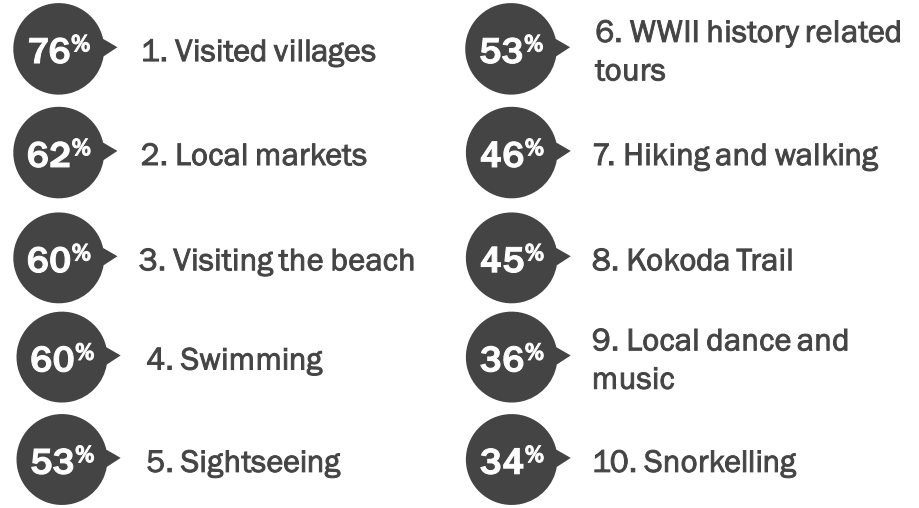
AUSTRALIA



TOP 5 PROVINCES VISITED



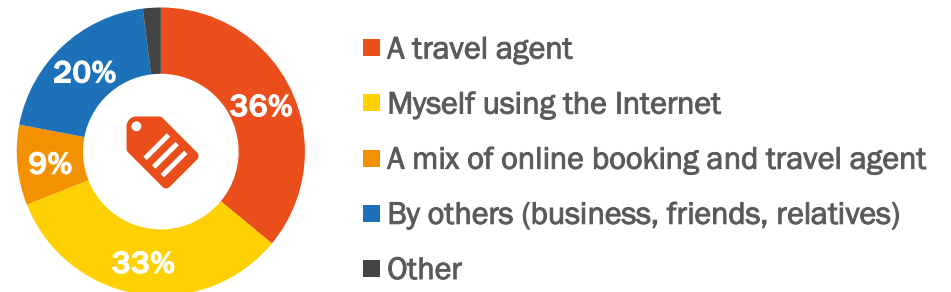
TOP 10 ACTIVITIES



INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



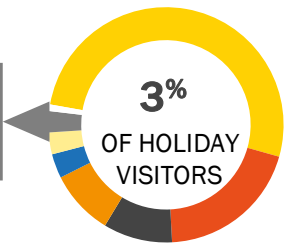
Australians exhibit interest in hard and soft adventure activities, with a specific focus on travel to Central and Northern Province. Given the mature market, a key is to promote historical, culture and adventure products in other provinces to encourage more spend.

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

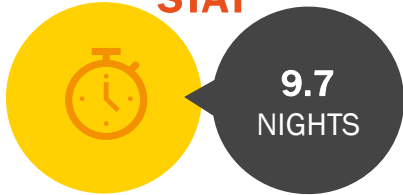


JUL 2017 – JUN 2019

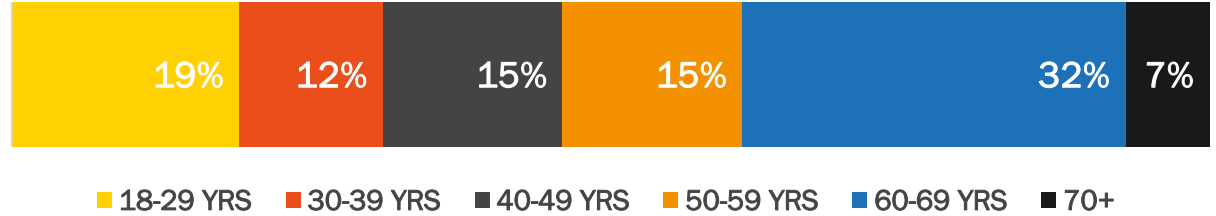
NEW ZEALAND



AVERAGE LENGTH OF STAY



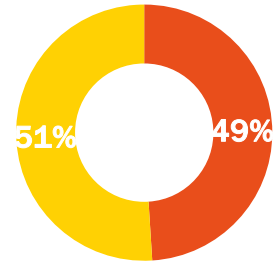
AGE



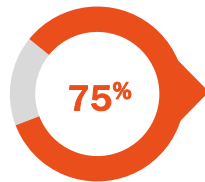
SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males

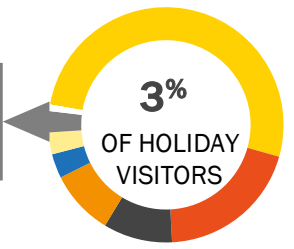


New Zealand holiday travelers are diverse with an equal gender split and broader range of ages. While previously reports showed New Zealand travelers to be the lowest spending, this more robust data set shows that they have slightly higher spending patterns than Australia. An opportunity to attract more of this market.



JUL 2017 – JUN 2019

NEW ZEALAND



TOP 5 PROVINCES VISITED

- 49% 1. National Capital District
- 20% 2. New Ireland
- 15% 3. East New Britain
- 9% 4. Milne Bay Province
- 9% 5. Madang



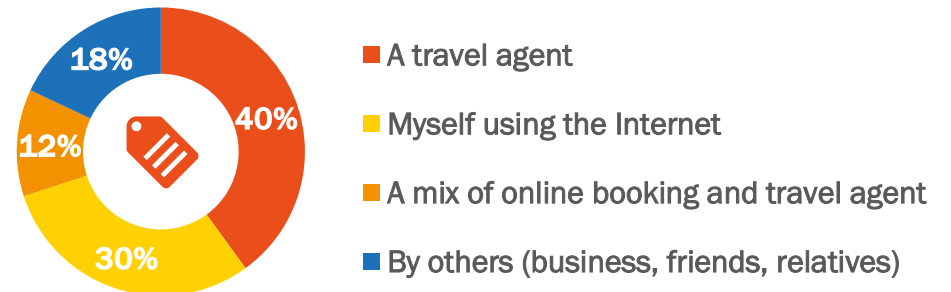
TOP 10 ACTIVITIES

- 71% 1. Visiting the beach
- 71% 2. Local markets
- 67% 3. Visited villages
- 52% 4. Swimming
- 51% 5. Sightseeing
- 48% 6. Snorkelling
- 39% 7. Diving
- 30% 8. WWII history related tours
- 28% 9. Local dance and music
- 25% 10. Kokoda Trail

INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Note:

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

New Zealanders are adventurous travelers with a focus on water-based and cultural activities. They mostly use travel agents to plan and book their trips. Friends and family recommendations continue to be the most important planning tool.



JUL 2017 - JUN 2019

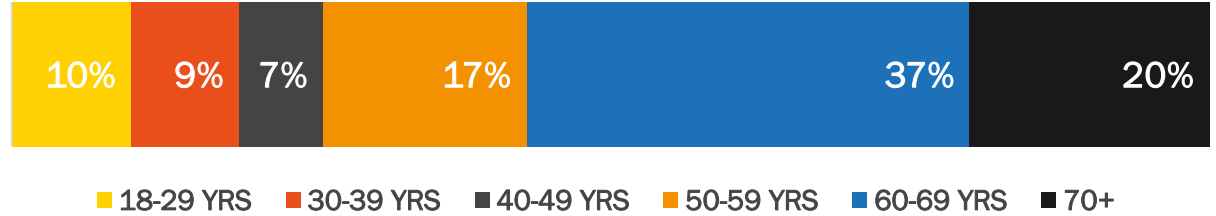
NORTH AMERICA



AVERAGE LENGTH OF STAY



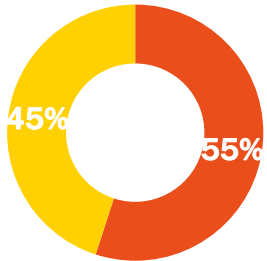
AGE



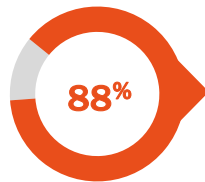
SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males



WERE SATISFIED

North American holiday travelers are the second highest yielding and oldest market for PNG. Given the age demographic, cost, and distance, visitor accessibility issues should be considered when developing new products.



JUL 2017 – JUN 2019

NORTH AMERICA



TOP 5 PROVINCES VISITED

- 58% 1. National Capital District
- 33% 2. Western Highlands
- 27% 3. East Sepik
- 16% 4. Milne Bay Province
- 15% 5. East New Britain



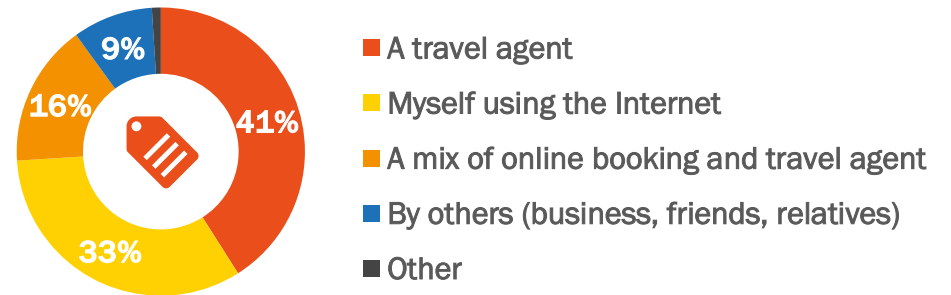
TOP 10 ACTIVITIES

- 77% 1. Visited villages
- 72% 2. Local markets
- 64% 3. Sightseeing
- 56% 4. Local dance and music
- 54% 5. Visiting the beach
- 49% 6. Cultural festivals and shows
- 48% 7. Snorkelling
- 48% 8. Kokoda Trail
- 44% 9. Birdwatching
- 43% 10. Cultural tours

INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



North Americans holiday travelers engage in cultural and nature based tourism along with some soft adventure activities. They are likely to use the services of a travel agent for both planning and booking, but also rely on the internet for information.

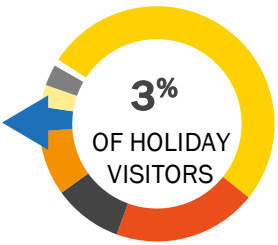
Note:

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



JUL 2017 - JUN 2019

PACIFIC



AVERAGE LENGTH OF STAY



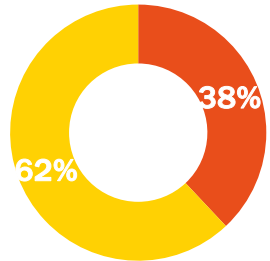
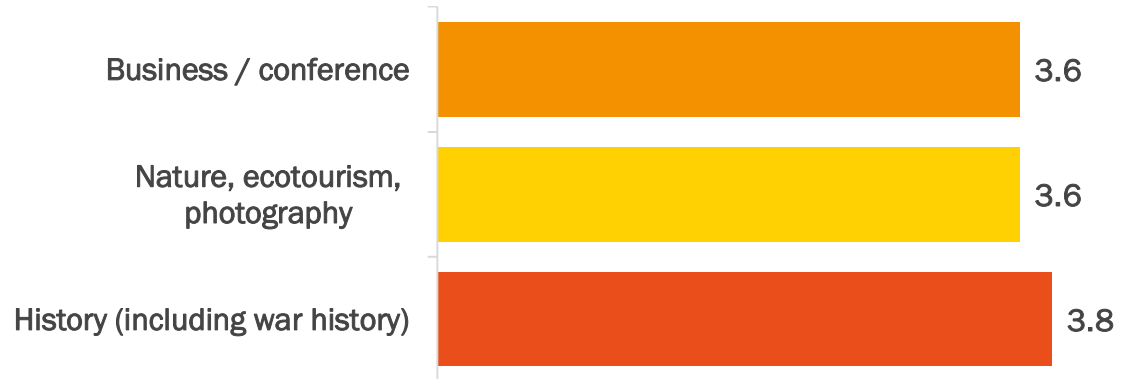
AGE



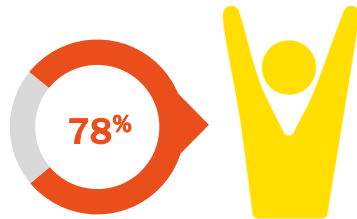
SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males



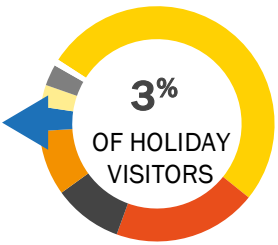
WERE SATISFIED

The Pacific is a small holiday market for PNG representing 3% of holiday visitors. It is a young market with the shortest length of stay. However, historical tourism is a key motivating factor for this market, offering product development opportunities.

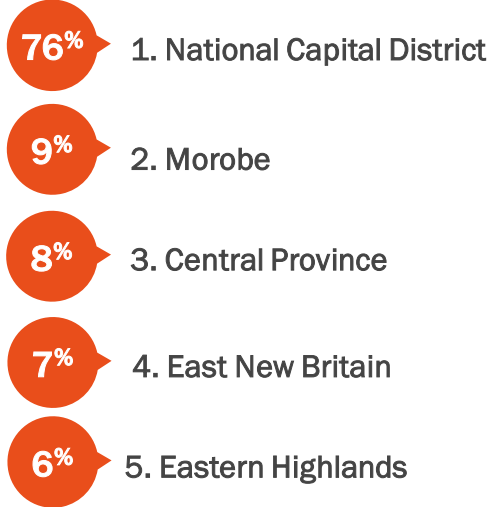


JUL 2017 – JUN 2019

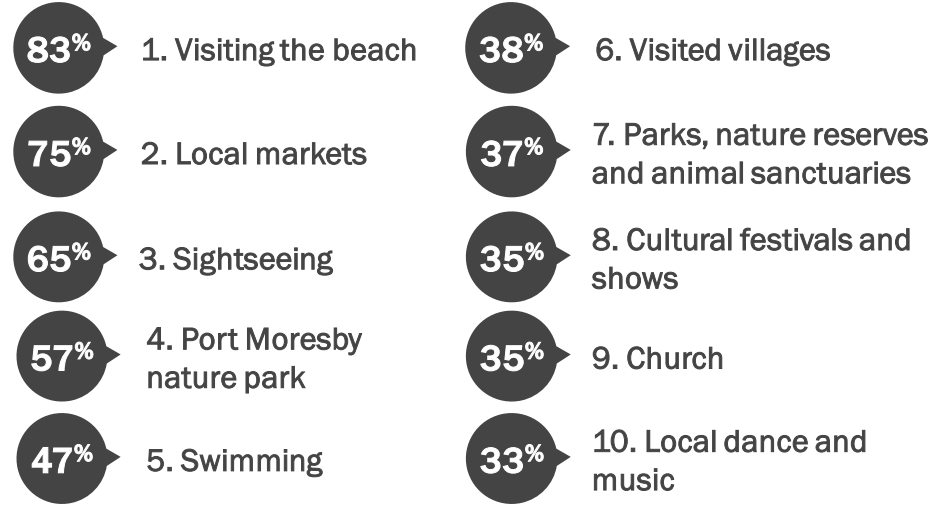
PACIFIC



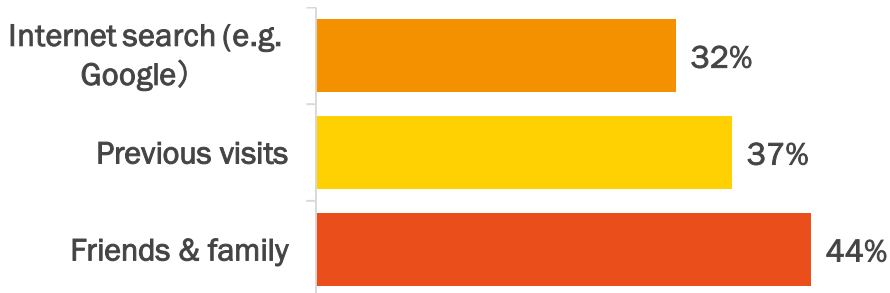
TOP 5 PROVINCES VISITED



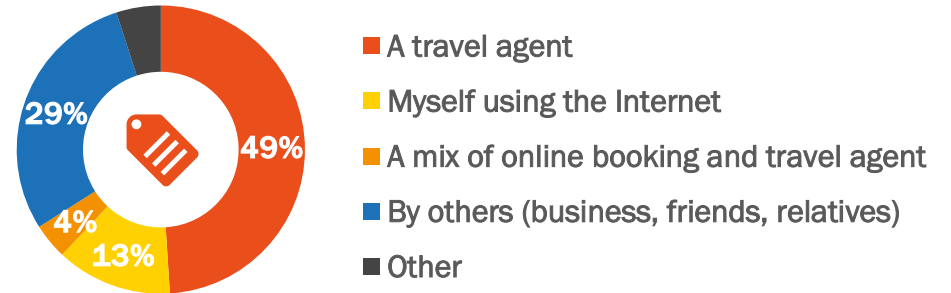
TOP 10 ACTIVITIES



INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Provinces visited and activity participation data indicate that most Pacific travelers stick close to Port Moresby. Travel assurance and information provided by others and previous visits are important for trip planning.

Note:

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

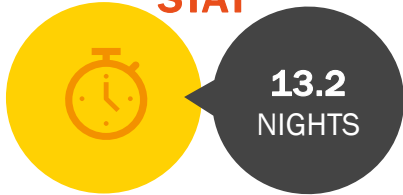


JUL 2017 – JUN 2019

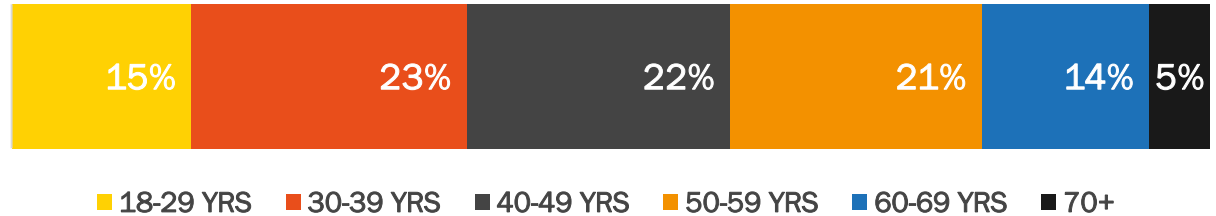
EUROPE (EXCLUDING UK)



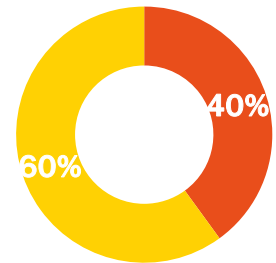
AVERAGE LENGTH OF STAY



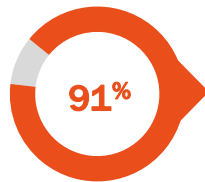
AGE



SPEND



■ Females ■ Males



WERE SATISFIED

INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



The higher than average yielding European holiday market has the longest average length of stay in PNG. The diversity in age ranges indicate a trend toward adventure travel with more younger male travelers.



JUL 2017 – JUN 2019

EUROPE (EXCLUDING UK)



TOP 5 PROVINCES VISITED

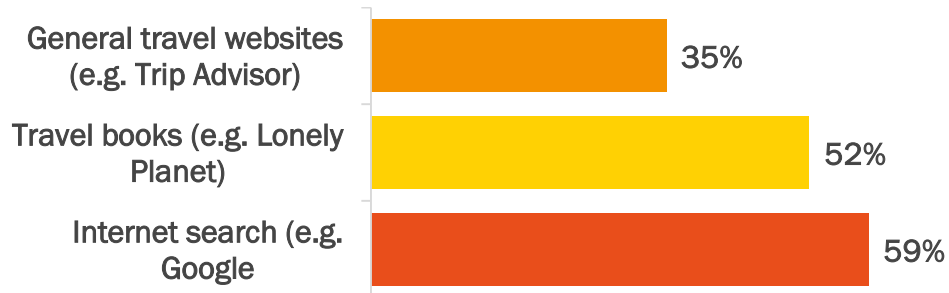
- 52%** 1. National Capital District
- 35%** 2. Western Highlands
- 29%** 3. East Sepik
- 26%** 4. East New Britain
- 25%** 5. Madang



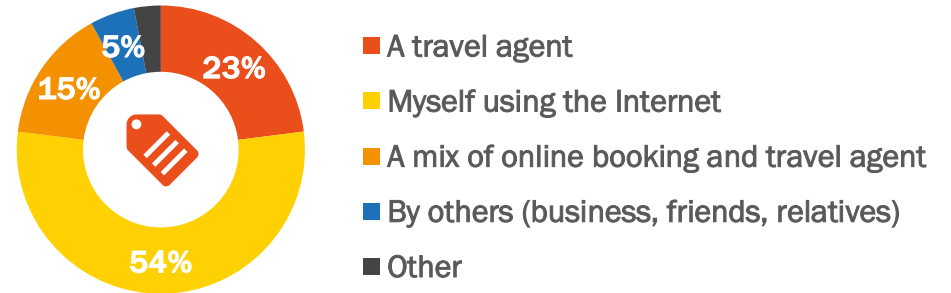
TOP 10 ACTIVITIES

- 61%** 1. Local markets
- 56%** 2. Visited villages
- 54%** 3. Visiting the beach
- 54%** 4. Sightseeing
- 49%** 5. Snorkelling
- 48%** 6. Kokoda trail
- 44%** 7. Cultural festivals and shows
- 40%** 8. Local dance and music
- 33%** 9. Swimming
- 29%** 10. Museums

INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



Europeans act independently to book travel online and search the internet for destination information. Ensuring updated information on PNG is available online, in multiple languages is important for this market.

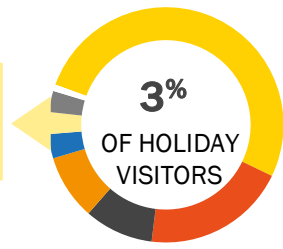
Note:

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



JUL 2017 – JUN 2019

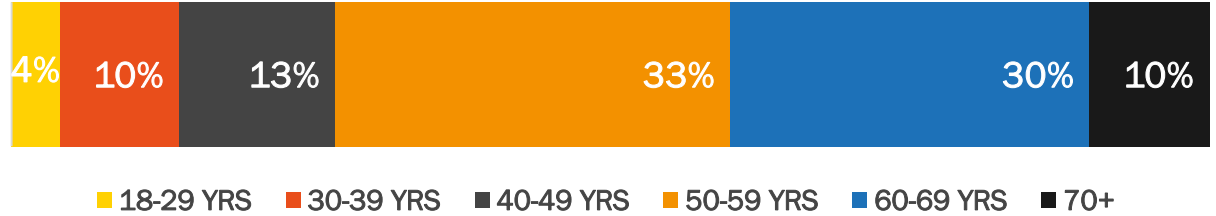
UNITED KINGDOM



AVERAGE LENGTH OF STAY



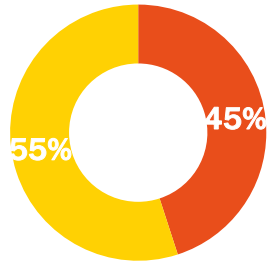
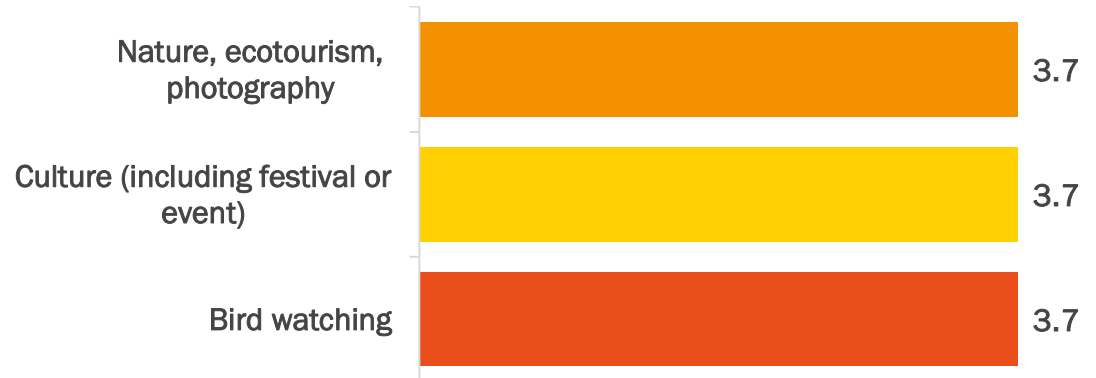
AGE



SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males



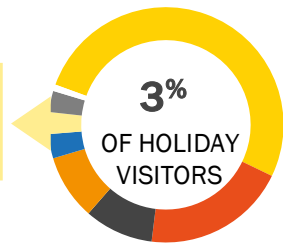
WERE SATISFIED

The UK is a high yield, mature market with the vast majority 50 years old and above. Birdwatching and culture are strong draws for this market and campaigns should focus on selling both bird related and cultural activities.



JUL 2017 – JUN 2019

UNITED KINGDOM



TOP 5 PROVINCES VISITED

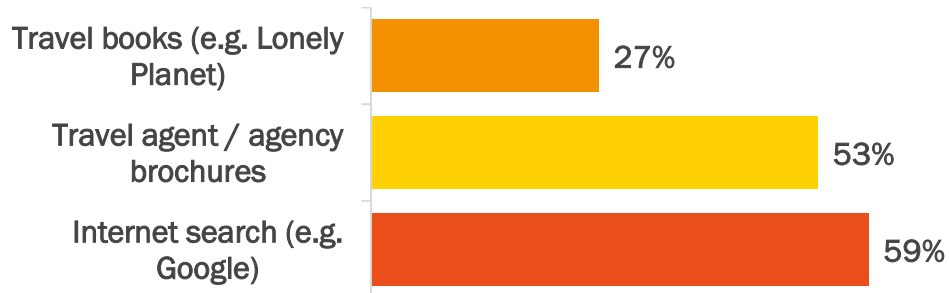
- 61% 1. National Capital District
- 34% 2. Western Highlands
- 29% 3. Central Province
- 26% 4. East Sepik
- 23% 5. East New Britain



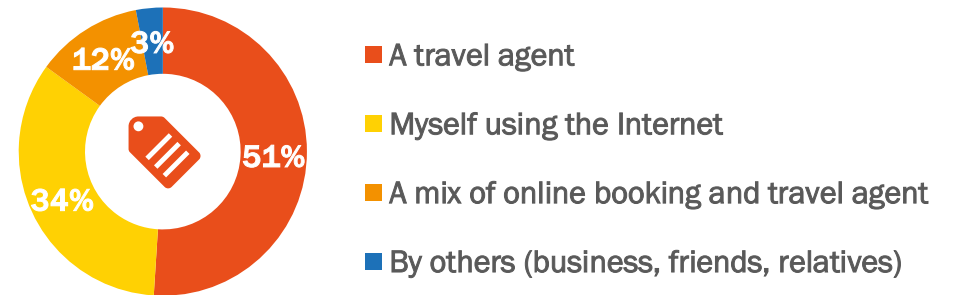
TOP 10 ACTIVITIES

- 79% 1. Visited villages
- 68% 2. Local markets
- 60% 3. Swimming
- 58% 4. Birdwatching
- 57% 5. Visiting the beach
- 51% 6. Local dance and music
- 49% 7. Snorkelling
- 44% 8. Sightseeing
- 44% 9. Parks, nature reserves and animal sanctuaries
- 42% 10. Cultural tours

INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



UK holiday visitors have a focus on nature based activities in PNG with high rates of participation in birdwatching. They are likely to use the services of a travel agent and the internet to plan and book their trips. Interestingly, they rely more on travel agents than Continental European travelers.

Note:

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



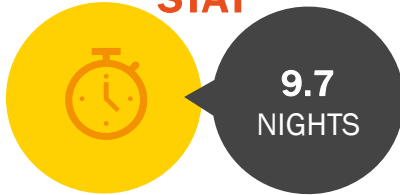
JUL 2017 – JUN 2019

ASIA

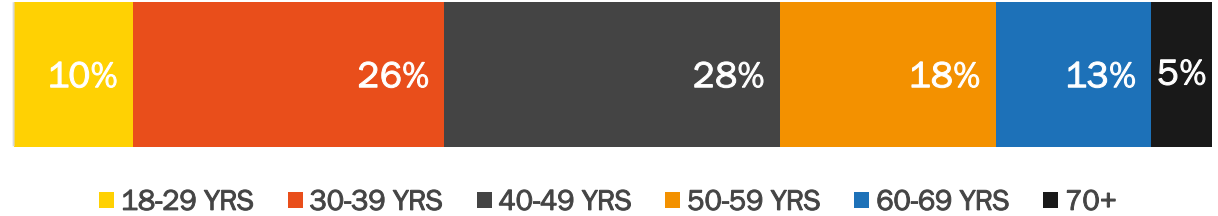


China, Japan, Korea, Malaysia, Singapore, Philippines, Indonesia, India, Other Asia

AVERAGE LENGTH OF STAY



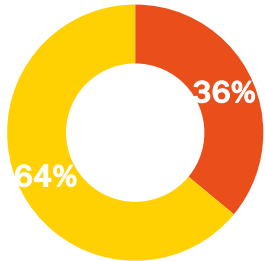
AGE



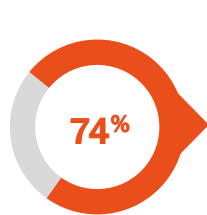
SPEND



INFLUENCING FACTORS FOR VISITING PNG? TOP 3 OPTIONS



■ Females ■ Males



WERE SATISFIED

The Asian holiday market shows diversity in age range, while still being predominately male. There are opportunities to further explore interest in individual source markets to increase spend and attract higher yielding visitors.



JUL 2017 – JUN 2019

ASIA



China, Japan, Korea, Malaysia, Singapore, Philippines, Indonesia, India, Other Asia



TOP 5 PROVINCES VISITED

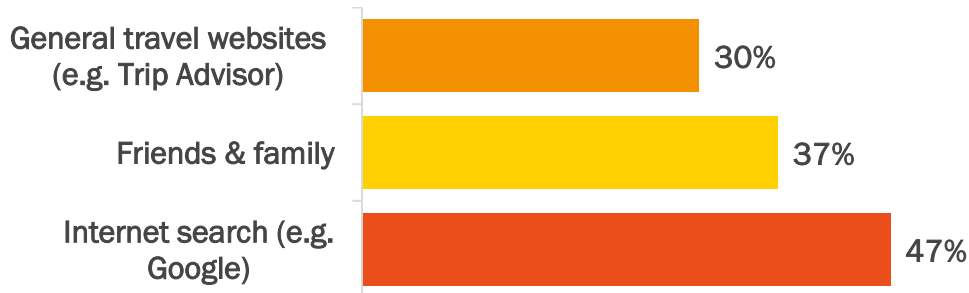
- 57% 1. National Capital District
- 15% 2. East New Britain
- 14% 3. Milne Bay Province
- 11% 4. Western Highlands
- 10% 5. Northern Province



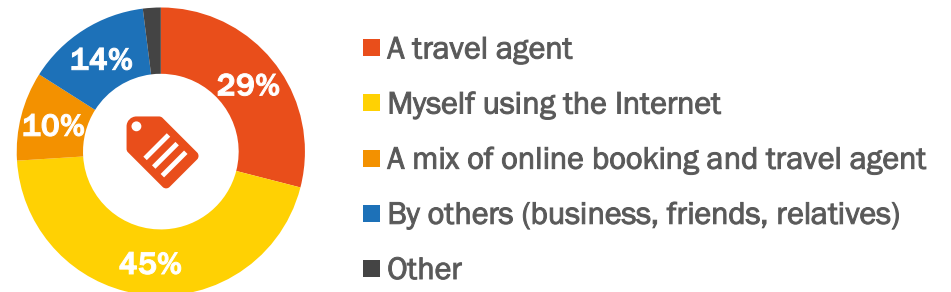
TOP 10 ACTIVITIES

- 78% 1. Local markets
- 62% 2. Visiting the beach
- 57% 3. Visited villages
- 52% 4. Sightseeing
- 46% 5. Port Moresby nature park
- 41% 6. Museums
- 40% 7. Diving
- 36% 8. Traditional cooking
- 35% 9. Cultural festivals and shows
- 34% 10. Parks, nature reserves and animal sanctuaries

INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS



HOW DID YOU PURCHASE YOUR TRAVEL?



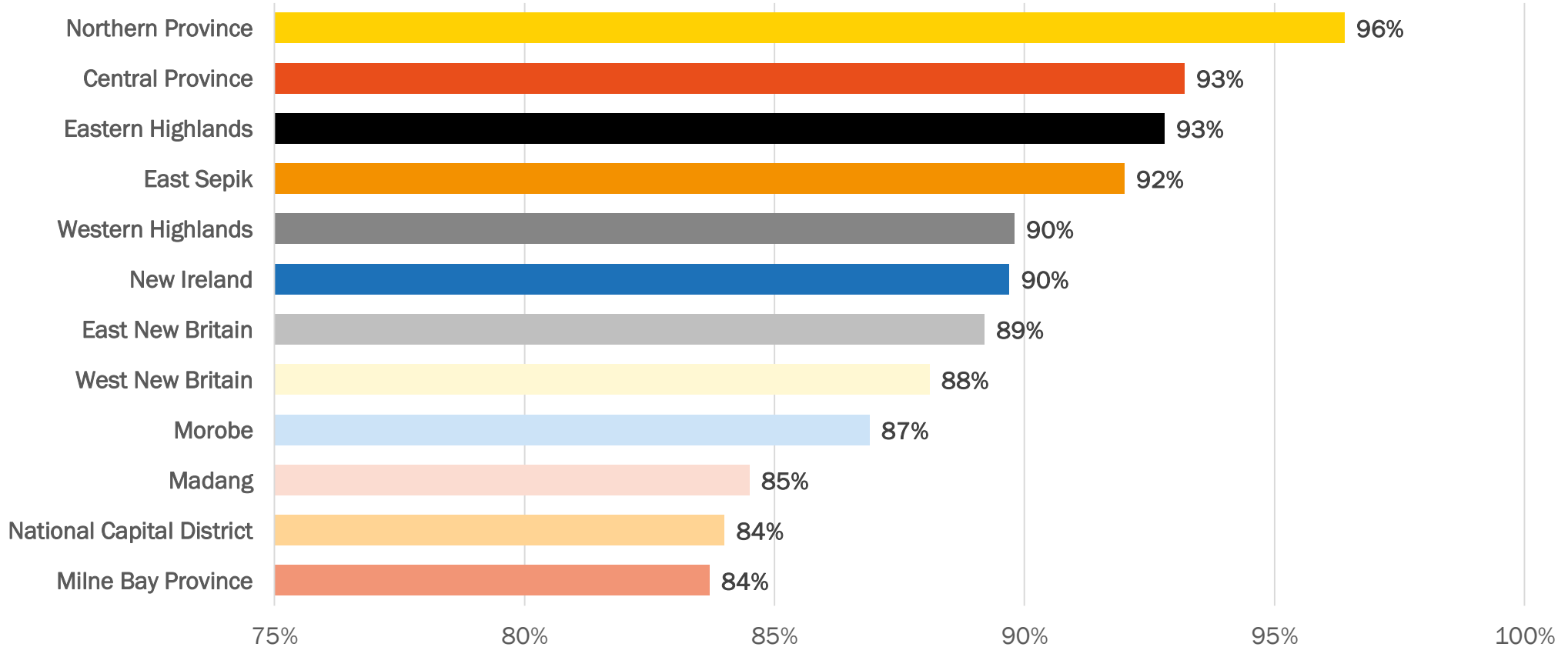
Asian holiday travelers tend to partake in soft adventure mostly in NCD and hub provinces of ENB and MB. There are opportunities to promote culture, diving and nature in other provinces to increase visitor spend.

Note:

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

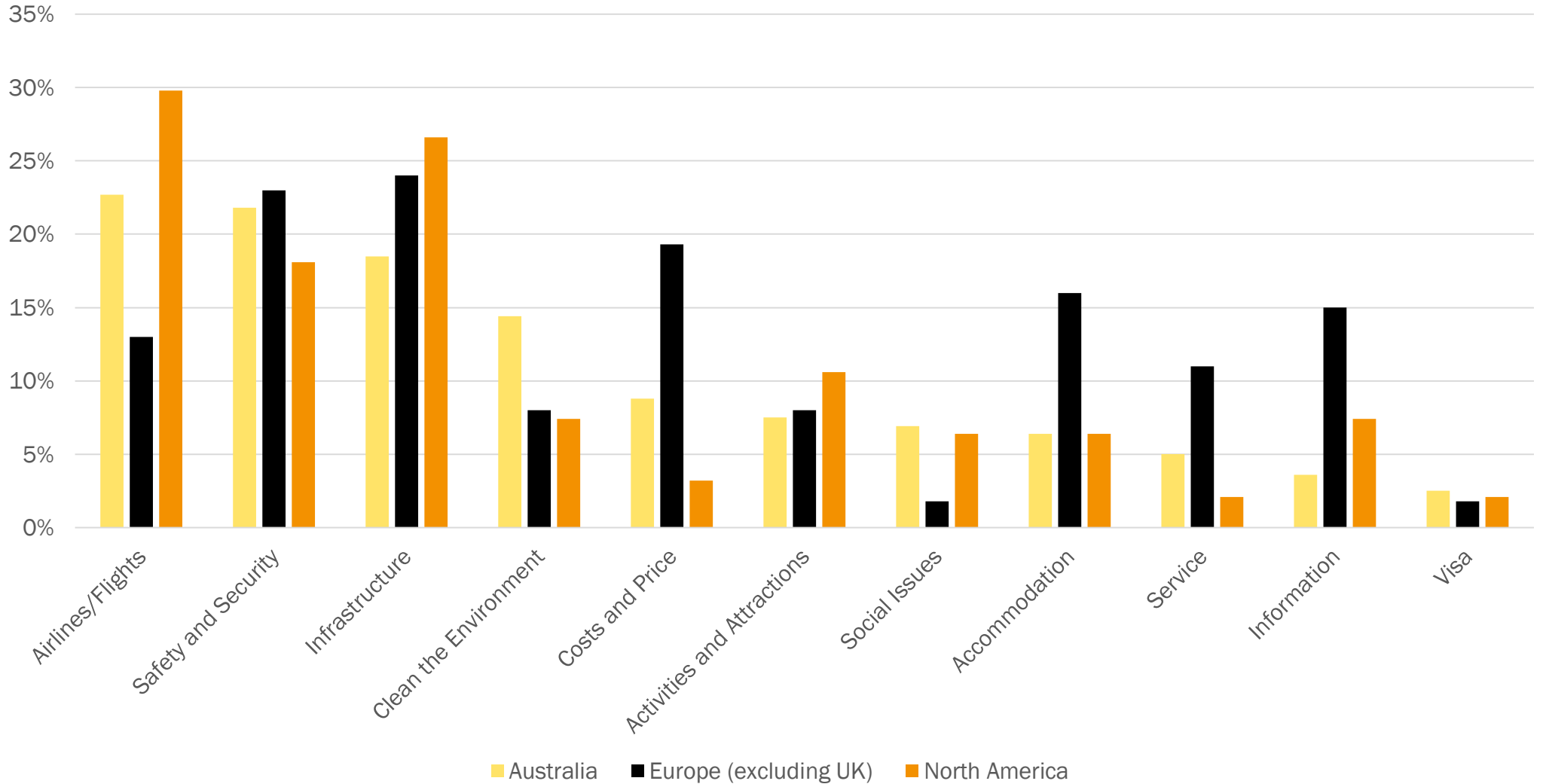


SHARE OF HOLIDAY VISITORS JUL 2017 – JUN 2019 (%)



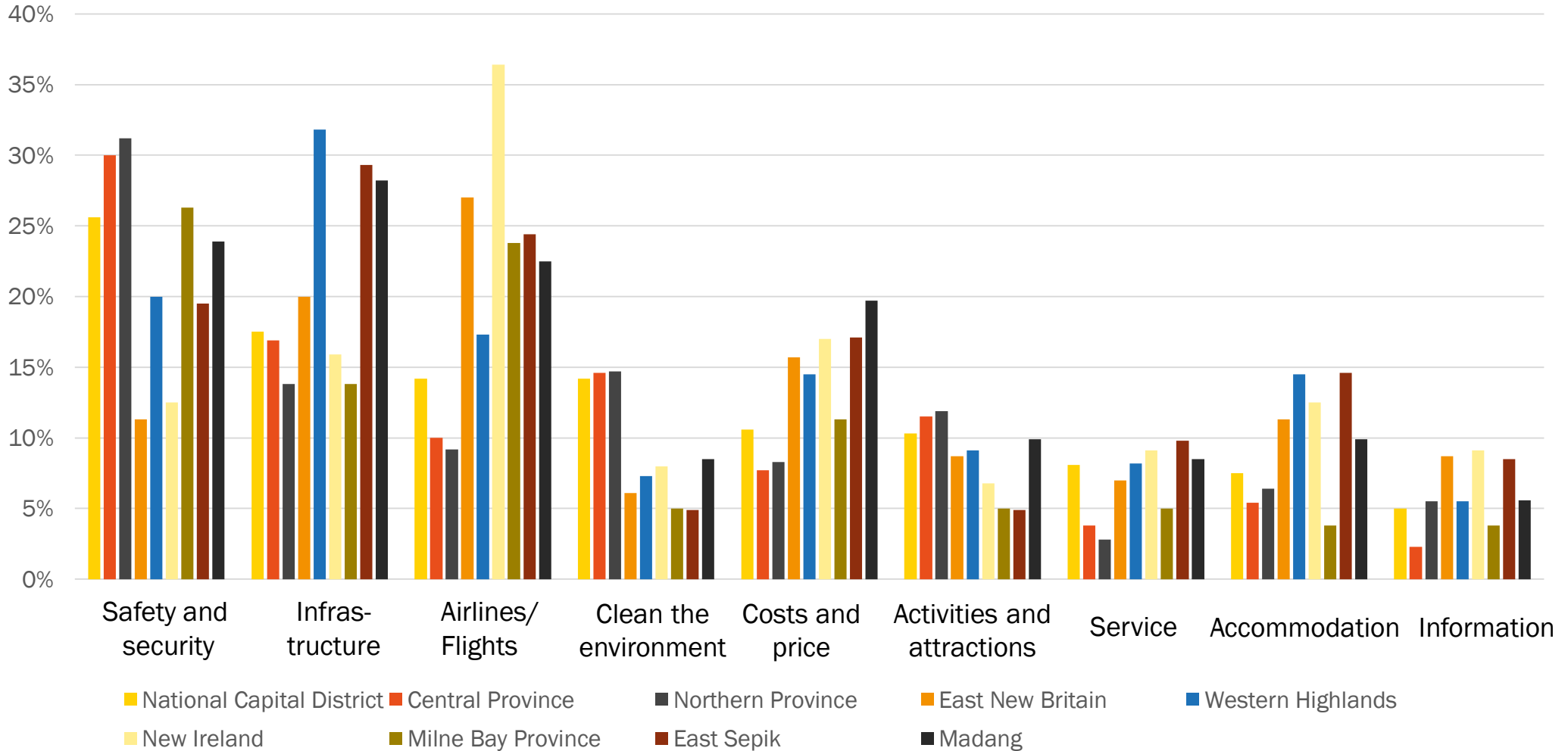
*A satisfied visitor includes respondents who answered 'satisfied' or 'very satisfied'

Levels of satisfaction of provinces all remain high with the lowest still at 84% satisfied. Key tourism destinations of Northern and Central Provinces have the highest levels of satisfaction.



European travelers seek appropriate infrastructure and accommodation, better pricing, and updated information for independent travel. North Americans encounter more challenges with flights and seek better infrastructure.

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



The areas where improvement is needed most across provinces are safety and security, infrastructure, flights and cleaning the environment. Provinces further out from Port Moresby struggle with high costs and price.

Note:

- 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.

