



Marketing Workshop 2016 Europe DMR



Today's Presentation

- Visitor Arrivals
- Market Trends and Characteristics
- Challenges
- Missed opportunities 2016
- Major Activities 2017
- Our 3 Strategies



Visitor Arrivals YE July 2016

Includes Cruise

Country	YE July 2014	YE July 2015	YE July 2016	YE July 15 / 14	YE July 16 / 15	Market percentage of total leisure	Holiday Rank
Europe	6.617	7.153	6.960	8,1%	-2,7%	4,27%	
Europe Holiday	2.542	2.428	2.921	-4,5%	20,3%	8,46%	2
Germany Holiday	1.024	791	1.397	-22,8%	76,6%	4,04%	
UK	5.283	6.059	6.180	14,7%	2,0%	3,79%	
UK Holiday	2.021	1.989	2.865	-1,6%	44,0%	8,29%	3
USA	7.502	7.281	6.713	-2,9%	-7,8%	4,12%	
USA Holiday	2.032	1.997	2.074	-1,7%	3,9%	6,00%	4
Japan	2.985	2.722	2.804	-8,8%	3,0%	1,72%	
Japan Holiday	1.253	1.165	1.286	-7,0%	10,4%	3,72%	5
Aust / NZ	89.456	91.752	90.536	2,6%	-1,3%	55,50%	
Aust / NZ Holiday	18.770	14.270	19.500	-24,0%	36,7%	56,44%	1
The World	164.258	168.256	163.124	2,4%	-3,1%	100,00%	
The World Holiday	31.712	27.019	34.547	-14,8%	27,9%	100,00%	

Leisure market from Europe to PNG: 20,3% growth for calendar YE July 2016 over the previous year, total arrivals to PNG for same period: 27,9% growth



Market Trends and Characteristics

- Complex market comprising 10 countries and seven languages
- Classic Wholesale / Agency Distribution model with conservative travelers relying upon travel agents for recommendations / booking
- European consumer very reliant on brochures for holiday decision planning. Online important for information | brochures important for booking
- Typical target segment is 50+ time rich / cash rich / experienced travelers who may have niche interests such as:
 - Diving
 - Trekking
 - Bird Watching / Nature
 - Culture Vultures
- Destination remains comparatively expensive



Challenges

- The emerging importance of Cruise and the complexities of working this market ...
 - Expeditionary (True North or Ponant)
 - Mass Cruise tourism (Carnival MSC P&O)
 - Thus far not focused on here in Europe
- Our Facebook page “Likes” are heavily biased toward Australia and PNG which we need correct and skew toward a more Europe centric user base
- The imperative of funding Trade and PR famils from the European markets due to:
 - Traditional trade distribution system
 - Complex but traditional media landscape
- Trying to be all things to all people on a very limited budget



Missed Opportunities 2016

- All planned Press trips were cancelled (one group plus two individual) – our market is heavily reliant on PR stories in the consumer media to motivate travel
- The cancellation of our media fam trip costing EUR6000 will lose us circa 8 million PGK in PR EAV this year
- Total PR EAV 1st November 2015 – 15 July 2016 : 1,6 million PGK
Down from 9,6 million PGK year on year due to cancellation of press trips ...



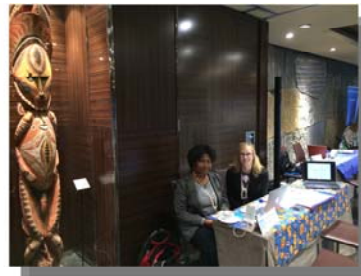
Missed Opportunities 2016

- We cancelled some Trade Show attendance (engaging trade creates opportunities and proactively identifies PR potentials)
- We cancelled many face to face trainings and undertook webinars instead
- Cancelled our Sarotti Chocolate coop campaign
- Cancelled our online consumer awareness campaign



Major Activities 2017

- Swiss Trade week January 2017
- Attendance at trade shows (BOOT, ITB, PATA Exchange)
 - Increase and create new and existing trade partners and build awareness of destination
- Continued promotion of our PNG Facebook page (8,616 likes versus 7,900 likes this time last year or 9% increase YoY)
- Ongoing focus on Webinar delivery for Agent Training
- One group PR famil
- Individual Press famils
- Attendance at Wholesaler Travel Days
- Ongoing brochure support for key and developing wholesalers



Major Activities 2017

- Two trade famils (Lukim and one specialist trade – Trekking)
- Ongoing delivery of quarterly newsletters to Wantok Agency community



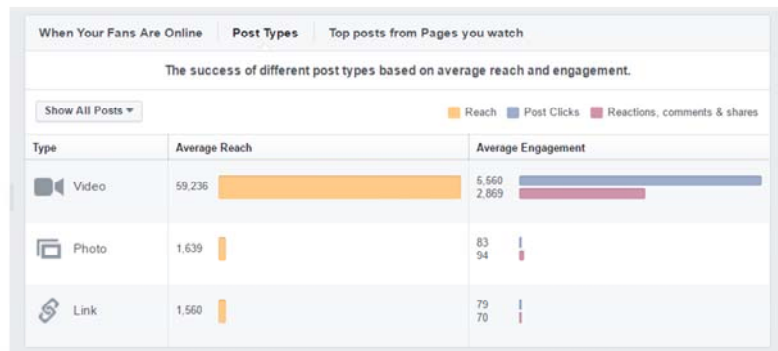
3 Strategies

1. Agent and PR Famiils are crucial for us and remains a key way to motivate selling staff and teach them how to sell the destination whilst messaging the destination to the 200million plus consumers in Europe
2. Ongoing Trade engagement with Brochure contributions and attendance at training events
3. Online and Social Media: We have to invest in building audience across a series of platforms including
 1. Facebook
 2. Instagram
 3. And integrating with our campaign partners' online presence



Social Media

The ever increasing importance of video files in social media and our urgent need for good snackable content produced for Social channels



TENK YU TRU

Rhett Lego
Strategic Director

Stella Dielhenn
Marketing Manager

Papua New Guinea Tourism Promotion Authority
C/o The Conjoint Marketing Group
Phone +49 89 219 096 514

Email: Solutions@theconjointmarketinggroup.com
Website: www.papuanewguinea.travel
Facebook: www.facebook.com/PNGTourismEurope

