

## Visitor Arrival Report–NOVEMBER 2016

**PLEASE NOTE:** Due to a change in PVA data source, starting in FEBRUARY 2014, and until further notice, PVA will be reporting its visitor arrival statistics based solely on NATIONALITY. This report and subsequent reports hereafter, for comparison with year 2013 arrivals by Market Segments will reflect the changes from Residency to NATIONALITY. The difference however small will be noticed when compared to the already published YEAR 2013 report by Residency. Over All total number of visitor arrivals will remain the same.

- **Overall:** For the month of NOVEMBER 2016, visitor arrivals to Palau (excluding residents, students, employments, flight crews and transits) totaled 9,384 representing a decreased of 2,045 (-17.89%) compared to NOVEMBER 2015 with 11,429 visitor arrivals.

	2015											
	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
<b>TOTAL</b>	15,920	17,787	14,966	12,812	12,705	11,129	12,305	15,557	12,286	12,456	11,429	12,579
vs. PP**	3%	12%	-16%	-14%	-1%	-29%	11%	26%	-21%	1%	-8%	10%
	2016											
<b>TOTAL</b>	14,183	14,134	12,252	10,667	9,602	11,383	12,494	13,283	12,167	8,987	9384	
vs. PP**	13%	0%	-13%	-13%	-10%	19%	10%	6%	-8%	-26%	4%	

\*\*PP: previous Period

		NOV 2016	Market Share %	Visitor IYA	Share IYA	Market Share %	NOV 2015	OCT 2016
1	PRC-China	3607	38.44%	65	87	44.29%	6484	4237
2	Japan	2281	24.31%	73	109	22.40%	2103	1532
3	ROC-Taiwan	549	5.85%	44	57	10.25%	1389	616
4	Korea	1089	11.60%	97	113	10.24%	1057	1029
5	N. America	643	6.85%	100	113	6.06%	791	792
6	Europe Total	855	9.11%	159	210	4.33%	280	446
	Other	360	3.84%	95	158	2.42%	352	335
	<b>Grand total</b>	<b>9384</b>	<b>100.00%</b>	<b>72</b>		<b>100.00%</b>	<b>12286</b>	<b>8987</b>

### Key Markets

- People's Republic of China (China) with 3,607 arrivals in NOVEMBER 2016 representing a decreased of 1,455 (-28.74%) compared to same month last year with 5,062 arrivals. PRC continues to be the overall leading market share by 38.44%. Choices of carriers for PRC nationals this month are Palau Pacific Air, Asiana Airlines, Lion Air, China Air, Private Airlines and Korean Airlines, which sustained number of China passengers. Purpose of Entry by Nationality data indicates that Business recorded a 1.64% whereas Tourist recorded 98.36%.
- Japan with 2,281 arrivals in NOVEMBER 2016 represent a decreased of 279 (-10.90%) compared to same month last year with 2,560 arrivals. Purpose of Entry by Nationality data indicates that Business recorded at 0.75% whereas Tourist recorded 99.25%.
- ROC (Taiwan) with 549 arrivals. Compared to NOVEMBER 2016, it decreased by 623 (-53.16%). Purpose of Entry by Nationality data indicates that Business recorded 2.19% whereas Tourist recorded 97.81%.
- Korea with 1,089 arrivals in NOVEMBER 2016 represent a decreased of 81 (-6.92%) compared to same month last year with 1,170 arrivals. Compared to OCTOBER 2016, it increased by 5.83%. Purpose of Entry by Nationality data indicates that Business recorded a 0.37% whereas Tourist recorded 99.63%.

- North America with 643 arrivals in NOVEMBER 2016 representing a decreased of 50 (-7.22%) compared to same month last year with 693 arrivals. Purpose of Entry by Nationality indicates that Business recorded 4.51% whereas Tourist recorded 95.18%
- Total Europe including Russia with 855 arrivals in NOVEMBER 2016 represent an increase of 575 (205.36%) compared to same month last year with 280 arrivals. Compared to OCTOBER 2016, it increased by 91.70%. Purpose of Entry by Nationality data indicates that Business recorded a 3.16% whereas Tourist recorded 96.84%

**Indicated Action:** PVA will still continue to monitor and recommend action plans for declining markets to recover visitor trends.

**Visitor Arrivals by Mode of Transportation (excluding residents, students, employments, flight crews and transits)**

AIRLINES	ANA Airlines	Asiana Airlines	China Airlines	Delta Airlines	Japan Airlines	Korea Air	Lion Airline	MILITARY CARRIER	Private Air	Totals
		1001	1139	1261		826	836	4	60	
% of PRC nationals		18%	2%	1%		23%	99%		32%	
AIRLINES	PPA	Trans Asia	United	VESSEL	YATCH					
	2399		1853	3	2				<b>TOTAL</b>	<b>8,987</b>
% of PRC nationals	97%		1%							

**Conclusion:**

- April, May, June, October and November is typically our low season, do not panic.
- This month’s visitors from Japan, Korea, Philippines, Europe and other showed an increase, all other countries showed a decrease.
- November Charter Airlines shows decline in passengers compared to previous months this year and same month last year. Most notable was Japanese, Taiwan and Chinese visitors.
- ANA, Japan Airlines, Thai Smile and Trans Asia showed no flights to Palau in October.
- This is the lowest month since April 2014.
- To maintain current growth Palau needs to see an increase of 1,200 visitors per month in 2017.
- Palau needs to encourage private sector to grow tourism spending in Palau.
- Tourists are still asking if Jellyfish Lake is closed or has Jellyfish.
- Questions over if Visa program has started and is needed and where to get Visa.
- The possibility if typhoons had an effect on tourism from Taiwan, Japan and China.

**Trends:**

Airlines are working on partnerships between airlines; this helps the traveler book trips with one airline without arriving at a change flight airport and picking up luggage and transferring to another airline. The partnership handles all this for the traveler. Flight miles can be used along with club memberships. Win-win for the traveler. These are the airlines Palau needs.

Airports are establishing partnerships with airlines; this commutates needs, helps schedules and supporting each other. Both airlines and airport identity growth and marketing opportunities. Working together they can implement airline friendly policies and incentives so each can operate in a viable manner.

## 2015 Visitor Arrival For Each Market Group by NATIONALITY (BUSINESS, INVESTOR & VISITORS ONLY)

	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL
AUS / NZ	102	61	100	84	176	91	73	65	76	88	63	76	1,055
GERMANY	143	88	131	105	42	26	24	40	50	68	88	95	900
ITALY	58	49	67	10	22	8	20	49	14	9	19	64	389
JAPAN	3,188	2,801	3,375	2,490	2,301	1,425	1,739	2,981	2,760	2,103	2,560	3,293	31,016
KOREA	1,756	828	820	813	960	886	985	1,103	768	1,057	1,170	1,181	12,327
MICRONESIA	50	38	34	45	82	36	39	43	52	53	28	26	526
PHILIPPINES	86	64	92	91	132	77	85	186	76	108	75	112	1,184
PRC CHINA	7,896	10,955	7,355	7,004	6,840	6,772	7,333	9,073	6,747	6,484	5,062	5,537	87,058
ROC TAIWAN	1,253	1,763	1,409	896	1,051	947	1,198	1,196	939	1,389	1,172	961	14,174
RUSSIA	94	32	57	35	43	3	16	12	8	23	64	15	402
SWITZERLAND	30	41	31	27	24	8	27	14	18	16	40	18	294
UNITED KINGDOM	72	56	75	70	45	36	30	51	37	42	62	52	628
US MAINLAND	789	749	1,074	782	785	682	576	533	506	791	693	792	8,752
OTHER EUROPE	278	173	220	172	74	68	57	121	100	122	222	160	1,767
OTHERS	125	89	126	188	128	64	103	90	135	103	111	197	1,459
<b>TOTAL</b>	<b>15,920</b>	<b>17,787</b>	<b>14,966</b>	<b>12,812</b>	<b>12,705</b>	<b>11,129</b>	<b>12,305</b>	<b>15,557</b>	<b>12,286</b>	<b>12,456</b>	<b>11,429</b>	<b>12,579</b>	<b>161,931</b>

## 2016 Visitor Arrival For Each Market Group by NATIONALITY (BUSINESS, INVESTOR & VISITORS ONLY)

	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	TOTAL	NOV 2016	NOV 2016	2016 YTD
														vs. NOV 2015	Market Share	vs. 2015 YTD
AUS / NZ	97	69	125	78	92	87	61	49	86	75	82	-	901	30.16%	0.87%	-7.97%
GERMANY	122	120	117	80	52	32	50	48	44	97	142	-	904	61.36%	1.51%	12.30%
ITALY	33	35	52	17	7	30	14	47	24	27	53	-	339	178.95%	0.56%	4.31%
JAPAN	3,050	3,368	3,294	1,967	1,627	1,332	1,905	2,867	3,221	1,532	2,281	-	26,444	-10.90%	24.31%	-4.61%
KOREA	1,392	1,038	782	1,047	864	758	1,021	1,057	1,169	1,029	1,089	-	11,246	-6.92%	11.60%	0.90%
MICRONESIA	39	67	23	28	48	77	124	60	41	44	20	-	571	-28.57%	0.21%	14.20%
PHILIPPINES	79	97	90	71	94	76	109	84	77	96	105	-	978	40.00%	1.12%	-8.77%
PRC CHINA	6,889	6,808	5,128	4,933	4,760	6,294	6,765	6,750	5,326	4,237	3,607	-	61,497	-28.74%	38.44%	-24.56%
ROC TAIWAN	1,357	1,264	1,232	1,206	1,019	1,578	1,463	1,537	1,323	616	549	-	13,144	-53.16%	5.85%	-0.52%
RUSSIA	70	25	58	54	24	2	9	1	8	23	21	-	295	-67.19%	0.22%	-23.77%
SWITZERLAND	42	36	33	27	20	14	23	11	11	20	40	-	277	0.00%	0.43%	0.36%
UNITED KINGDOM	51	53	80	70	50	51	56	45	45	63	49	-	613	-20.97%	0.52%	6.42%
US MAINLAND	682	828	862	657	692	782	699	488	537	792	643	-	7,662	-7.22%	6.85%	-3.74%
OTHER EUROPE	186	171	243	189	86	92	83	123	144	216	550	-	2,083	147.75%	5.86%	29.62%
OTHERS	94	155	133	243	167	178	112	116	111	120	153	-	1,582	37.84%	1.63%	25.36%
<b>TOTAL</b>	<b>14,183</b>	<b>14,134</b>	<b>12,252</b>	<b>10,667</b>	<b>9,602</b>	<b>11,383</b>	<b>12,494</b>	<b>13,283</b>	<b>12,167</b>	<b>8,987</b>	<b>9,384</b>	<b>-</b>	<b>128,536</b>	<b>-17.89%</b>	<b>100.00%</b>	<b>-13.94%</b>