



PAPUA NEW GUINEA TOURISM PROMOTION AUTHORITY

2023

VISITOR ARRIVAL REPORT



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PAPUA NEW GUINEA TOURISM

VISITORS JANUARY - DECEMBER 2023

TOTAL VISITORS - 112,746



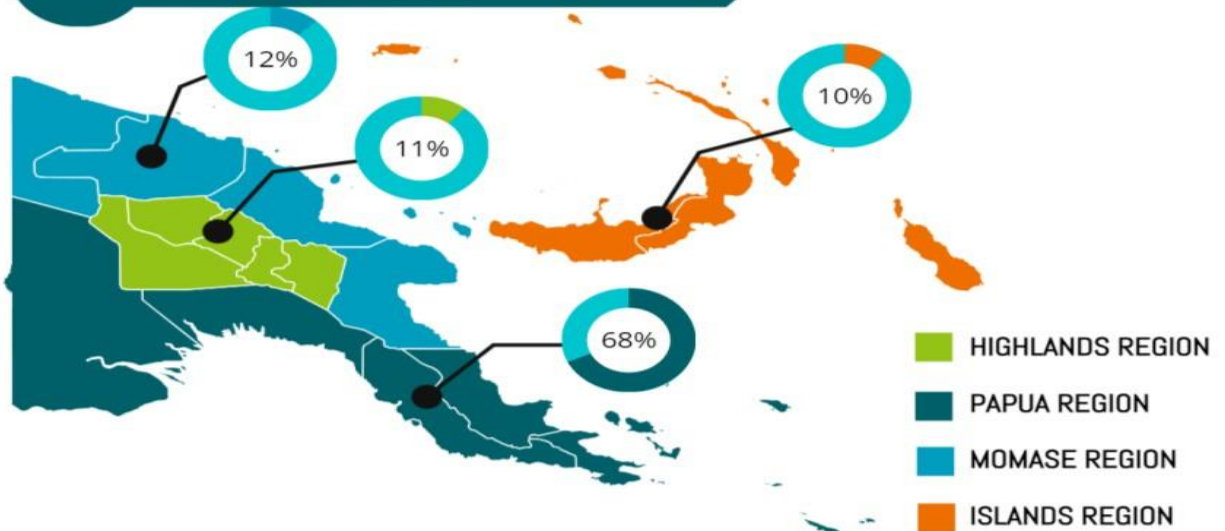
TOTAL VISITORS (%) BY MARKET



PURPOSE OF VISIT



REGION VISITED



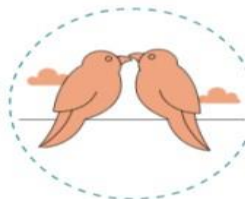
TOP 5 TOURIST ACTIVITIES



CULTURE



TREKKING



BIRD WATCHING



HISTORY



DIVING

1.1 Introduction

The last two years (2020 and 2021) have been the most challenging years in the history of tourism worldwide as a result of the unprecedented impact of the COVID-19 pandemic on global tourism, with restrictions on travel, low consumer confidence and a global struggle to contain the COVID-19 virus, all contributing to the worst years on record in the history of tourism worldwide. However, in 2022 international arrival picked up slowly, and last year (2023) international arrivals increased by a healthy margin in all the regions around the world including the Asia Pacific region and in Papua New Guinea.

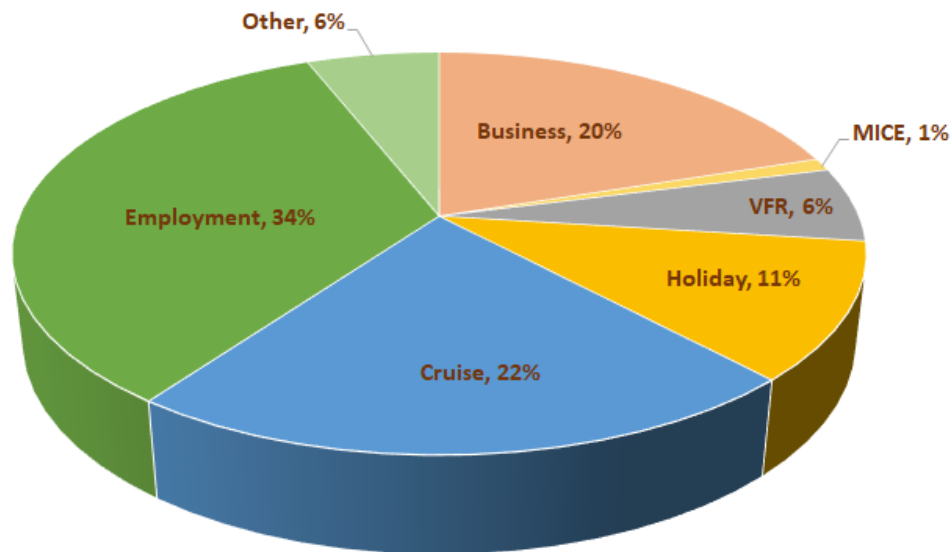
This report presents the trends and market analysis of all short-term international visitors to PNG in 2023, emphasizing more on the holiday market. It is reported by **source market** and **purpose of visit** to the country. The report also presents summary tables and graphical analysis of the annual trends to see historical performance of tourism in the year compared to the previous years. Additional marketing briefs are also included to compliment the arrival trend from the key source market and geographical regions.

1.2 Executive Summary

Papua New Guinea received about 144,067 international arrivals (by air and sea) in 2023. This was an increase of 116% or 77,291 additional international arrivals compared to 66,776 arrivals received in 2022. Holiday arrival by air to the country increased by 184% in 2023. Business, VFR, MICE and Employment related arrivals to the country also increased by big margin. On the other hand, cruise tourists recorded 31,321 arrivals, which was also a big increase in the year compared to 2022.

Out of the total arrivals, 20% came for business, 11% on holiday, 6% came to visit friends and relatives, 34% came for employment, 1% MICE and the remaining 6% visited the country for other reasons. The big increase in international arrivals to the country is a direct result of opening up our international borders in the country and in many destinations around the world. Cruise tourists to the country also recorded a big increase in 2023, and the healthy trend in international arrivals to PNG is expected to continue in 2024.

Percentage Distribution by Purpose of Visit – 2023



Holiday Arrivals from all the key source markets also increased by big margin in 2023:

Australia (↑)	United Kingdom (↑)	New Zealand (↑)
America (↑)	Canada (↑)	Malaysia (↑)
Japan (↑)	China (↑)	Singapore (↑)
Germany (↑)	France (↑)	Philippines (↑)

Holiday Arrivals by Source Market – 2023/2022

Country	2023	2022	Change	% (-/+)
Australia	8445	2,793	5,652	202
New Zealand	344	157	187	119
Oceania	430	119	311	261
China	1218	120	1,098	915
Japan	289	45	244	542
Korea	98	24	74	308
Malaysia	228	135	93	69
Singapore	100	35	65	186
Philippines	524	269	255	95
Indonesia	101	39	62	159
India	272	145	127	88
Other Asia	383	110	273	248
United Kingdom	479	239	240	100
Germany	323	164	159	97
France	191	94	97	103
Netherlands	71	28	43	154
Other Europe	788	333	455	137
USA	1153	539	614	114
Canada	165	47	118	251
Other America	112	46	66	143
Africa	136	85	51	60
Russia	80	19	61	321
Italy	85	22	63	286
Scandinavia	22	15	7	47
Chile	4	1	3	0
Israel	72	52	20	38
Total	16,113	5,675	10,438	184

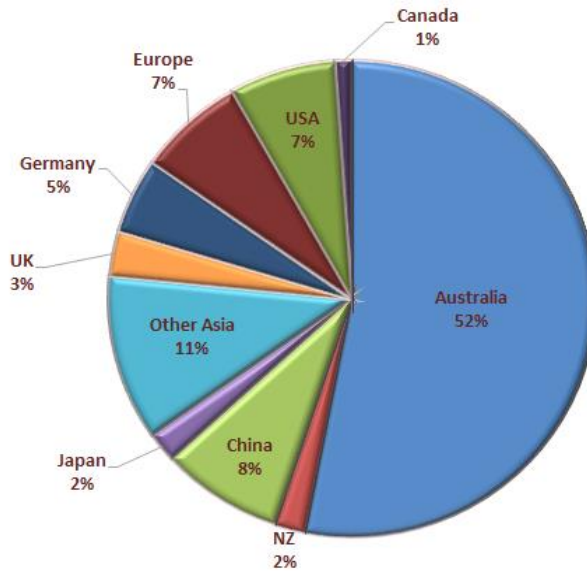


2019 data (line graph) depict as the bench mark

1.3 Market Share Distribution

On the total holiday arrivals, Australian market represented 52 percent of the holiday arrivals, followed by Asia (11%), China (8%), USA and Europe (7% each), Germany (5%), UK with (3%), Japan and New Zealand at 2% each, while Canada contributed 1% of the total holiday arrivals to PNG.

Holiday Arrivals Share by Source Market – 2023

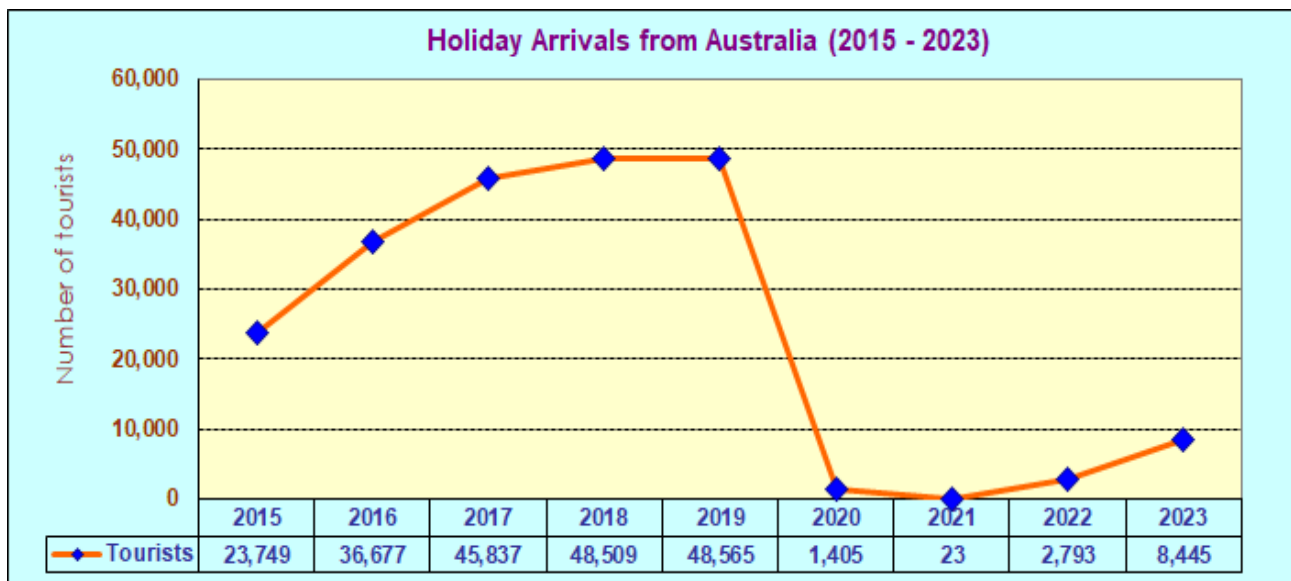


Market share from Australia, Germany, UK and Japan increased significantly compared to 2022. Most of the visitors came to PNG for employment, business and holiday.

1.4 Source Market Performance

Australian Market

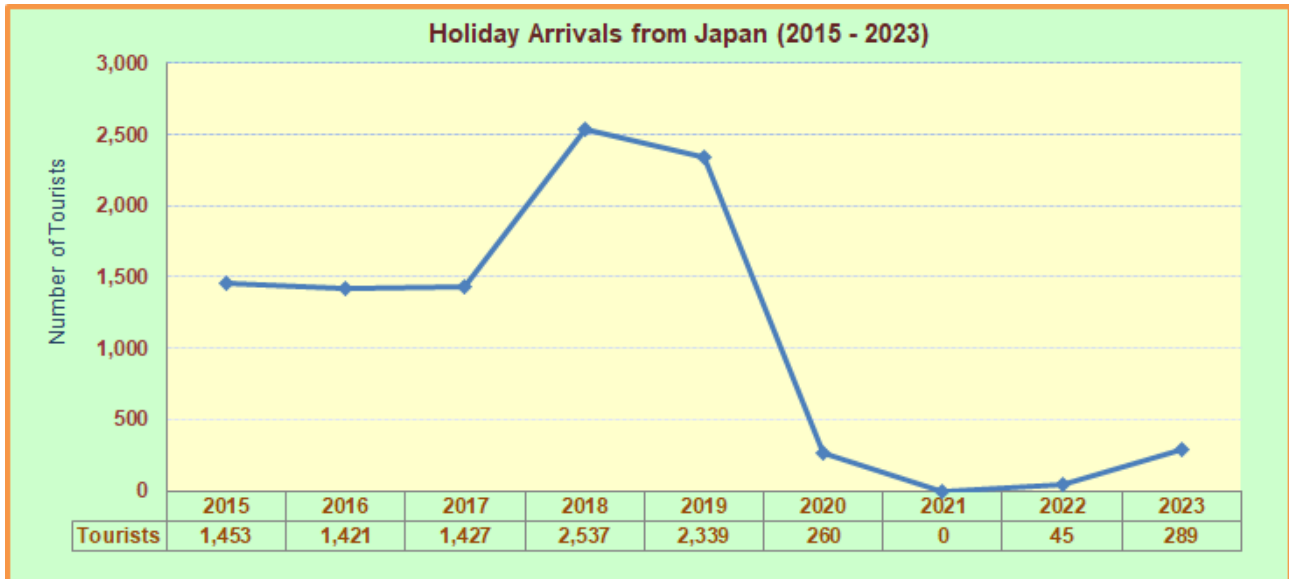
The Australian market is the highest single source market for Papua New Guinea, it accounts for more than 50 percent of all arrivals to Papua New Guinea. Overall arrivals from Australia increased by over 200% in 2023, while, total holiday arrivals by air recorded a big increase of 202% from the market.



Japan Market

In 2018, arrivals from this market picked up strongly by recording an increase of 35% compared to the previous year. This was a result of more tourists arriving by cruise ships to the country, however, it decreased sharply in 2019, and dropped further in 2020 and 2021 as a result of the Covid-19 pandemic. In 2022, tourist arrival from the market picked up well and continued to increase by 100%, and in 2023 holiday arrivals by air increased further by more than 100% compared to 2022.

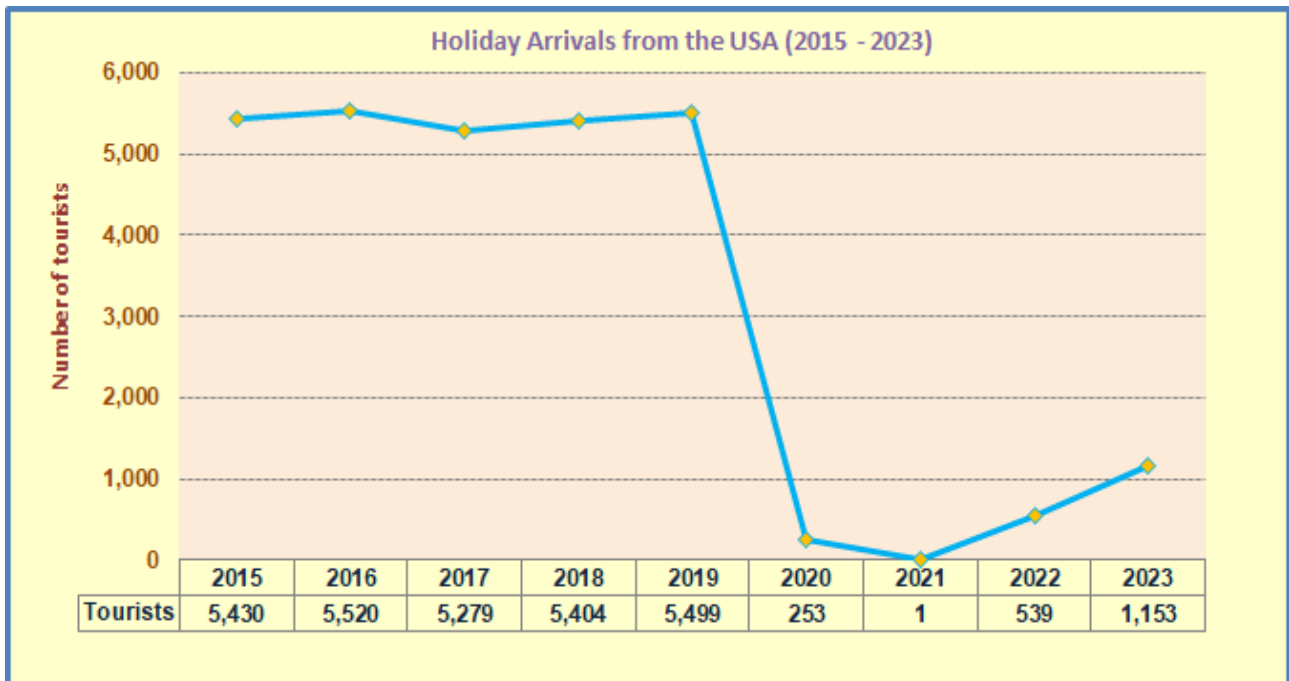
Annual holiday arrivals from Japan Market

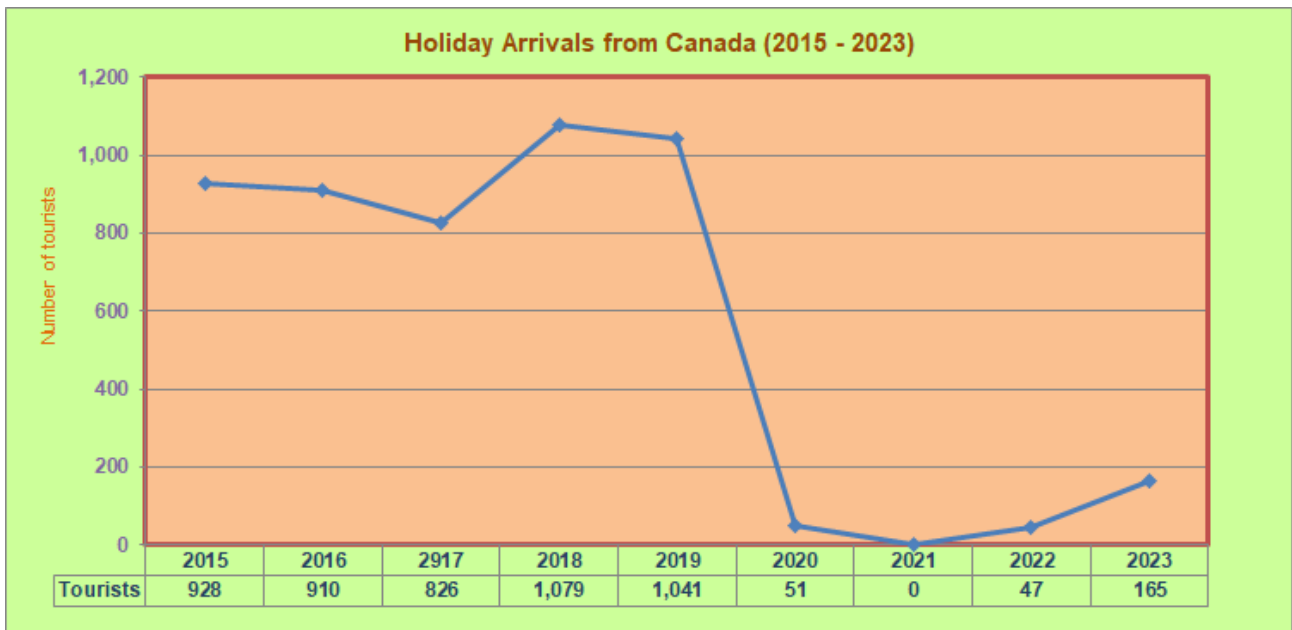


North American Market

In US and Canada, interest in Papua New Guinea is strong, but due to the recent coronavirus threats around the world, arrivals from USA and Canada dropped sharply in 2020 and 2021. However, holiday arrivals from the North American Market picked up well and recorded an increase in 2022 and 2023 respectively.

Annual holiday arrivals from the American Market

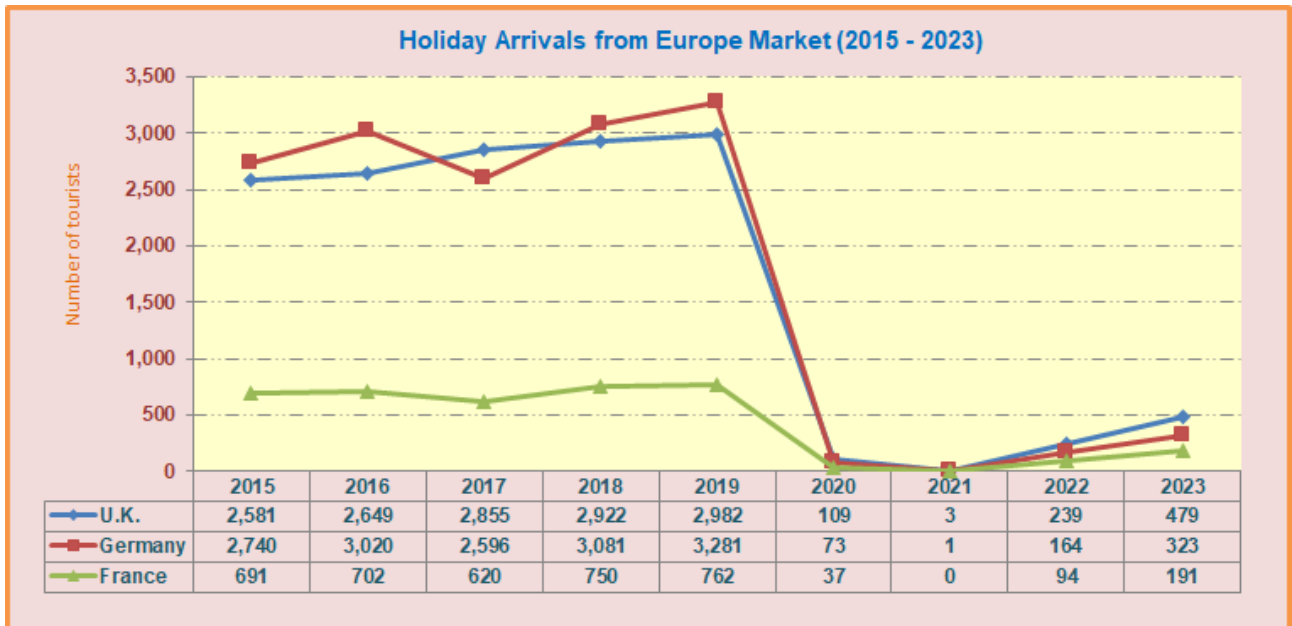




Europe

Europe is a valuable holiday market for Papua New Guinea with long-staying visitors who like to engage in multiple activities. The Europe market comprise of the United Kingdom, Germany, France, Netherlands and other smaller contributing European markets. As PNG's fourth largest holiday markets, the United Kingdom and Germany are the key focus of Papua New Guinea Tourism Promotion Authority's international marketing, trade and public relations activities. However, the smaller European markets have shown their resilience over the past years, despite the negatives, many present good growth opportunities for the Papua New Guinea Tourism Industry. In 2021, holiday arrivals from Europe posted a negative growth as a result of the COVID-19 Pandemic, and picked up again in 2022 and continued to record increase in 2023.

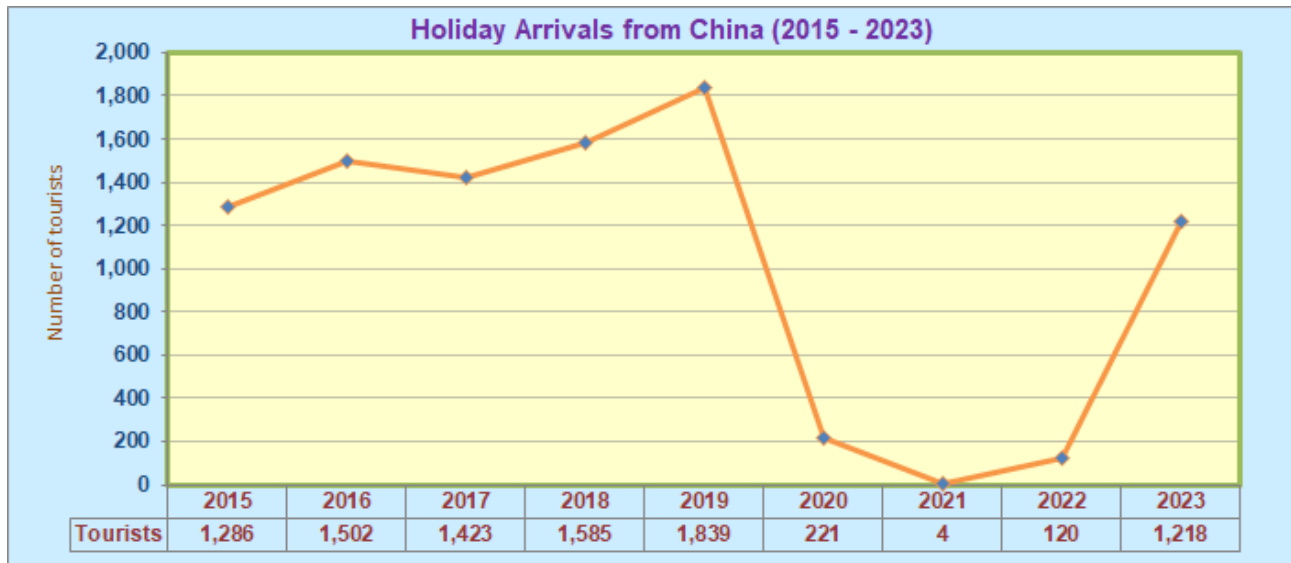
Annual holiday arrivals from Europe Market



Most of the European tourists traveling to Papua New Guinea are motivated by PNG's unique culture and natural environment. TPA's effective marketing of the cultural festivals and unique tourism products in the region had generated a lot of demand in the market in the previous years.

China

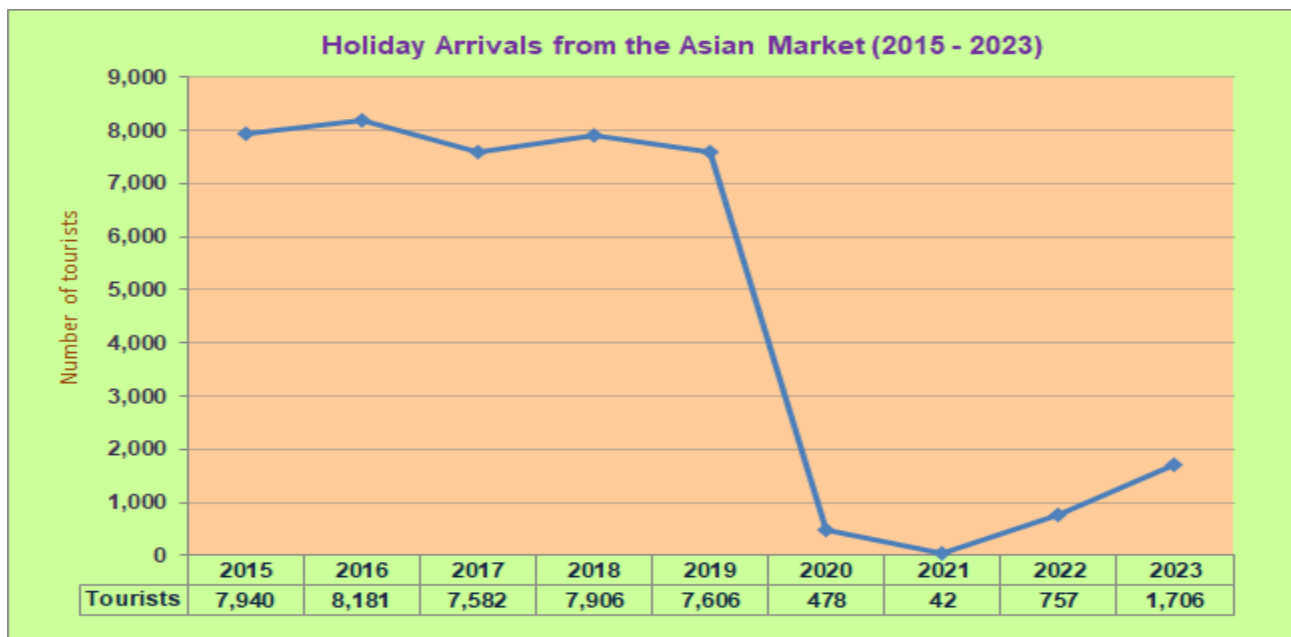
In the Asian region, China and Korea are potential markets for Papua New Guinea and represents about 10% of the total arrivals. Most of the visitors from these markets visit for business and employment reasons like all other Asian countries. In 2022 and 2023, arrival numbers started to pick slowly, and it is expected to grow strongly in 2024 and onwards.



Other Asian Markets

The other Asian markets collectively represent over 20 percent of the total arrivals to PNG. In 2022, holiday arrivals from the other Asian countries increased by over 100 percent compared to the previous year. Most of the visitors from the Asian market visited PNG for business and employment reasons.

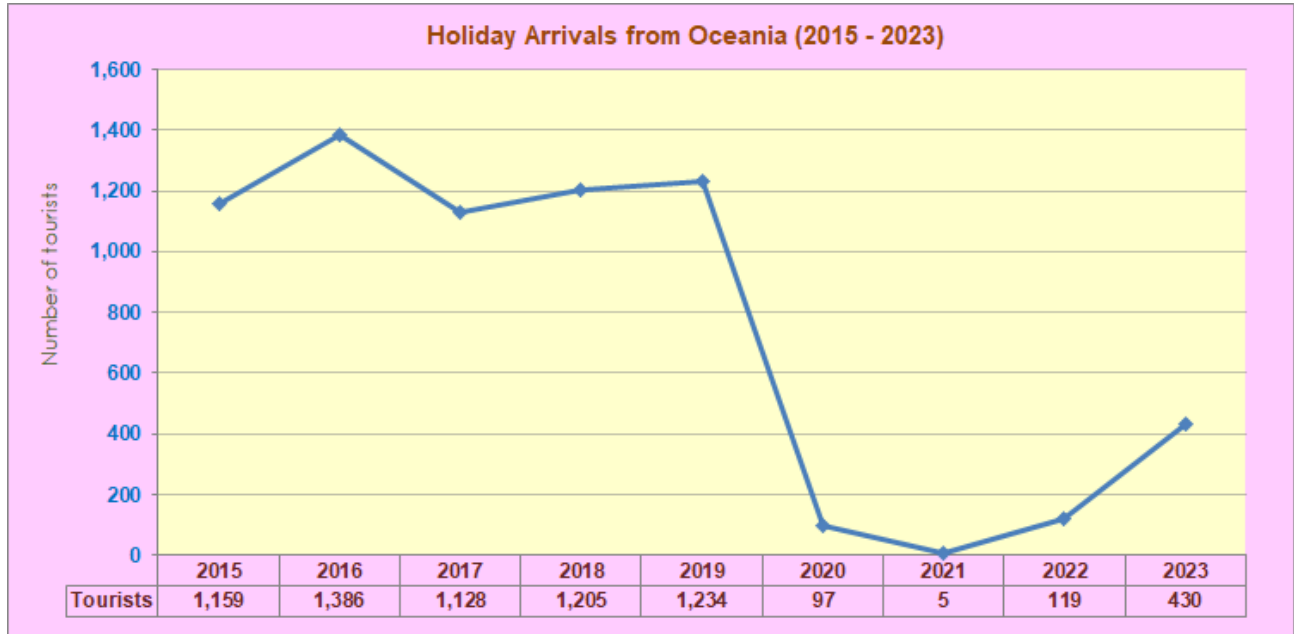
Asian tourists are often seen as just one category - package tourist, but there are other categories. By recognizing these categories and catering for them better, Papua New Guinea has a great opportunity to take advantage of growth in the number of Asians including Japanese holidaying overseas. In the past, most of the Asian tourists preferred package tours. Today, many Japanese/Asians have already experienced overseas travel, so their desires are changing. As a result, travel agencies in Japan are providing various kinds of new services to attract customers, where PNG tourism operators can take advantage of maintaining a close relation with the Japan travel agencies and wholesalers and sale their products.



Oceania

Total arrivals from Oceania in 2021 decreased by 95 percent compared to the total arrivals in 2020. Most of the visitors from this market come for business and employment reasons. In 2022 it has started to pick up and recorded an increase, and in 2023 arrivals further increased by over 150% compared to the previous year.

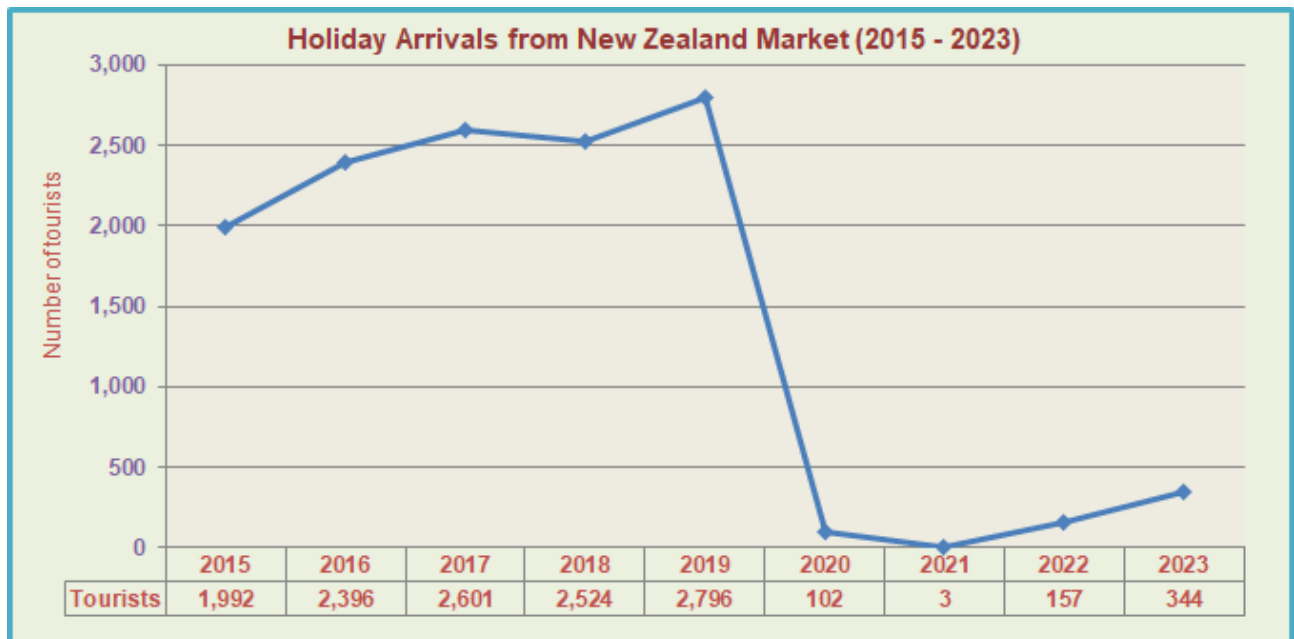
Annual holiday arrivals from the Oceania Market



New Zealand

New Zealand contributes about 5 percent of the total arrivals to PNG, and holiday arrivals from this market increased by over 100% in 2022 compared to 2021, and further increased by 120% in 2023.

Annual holiday arrivals from the New Zealand Market

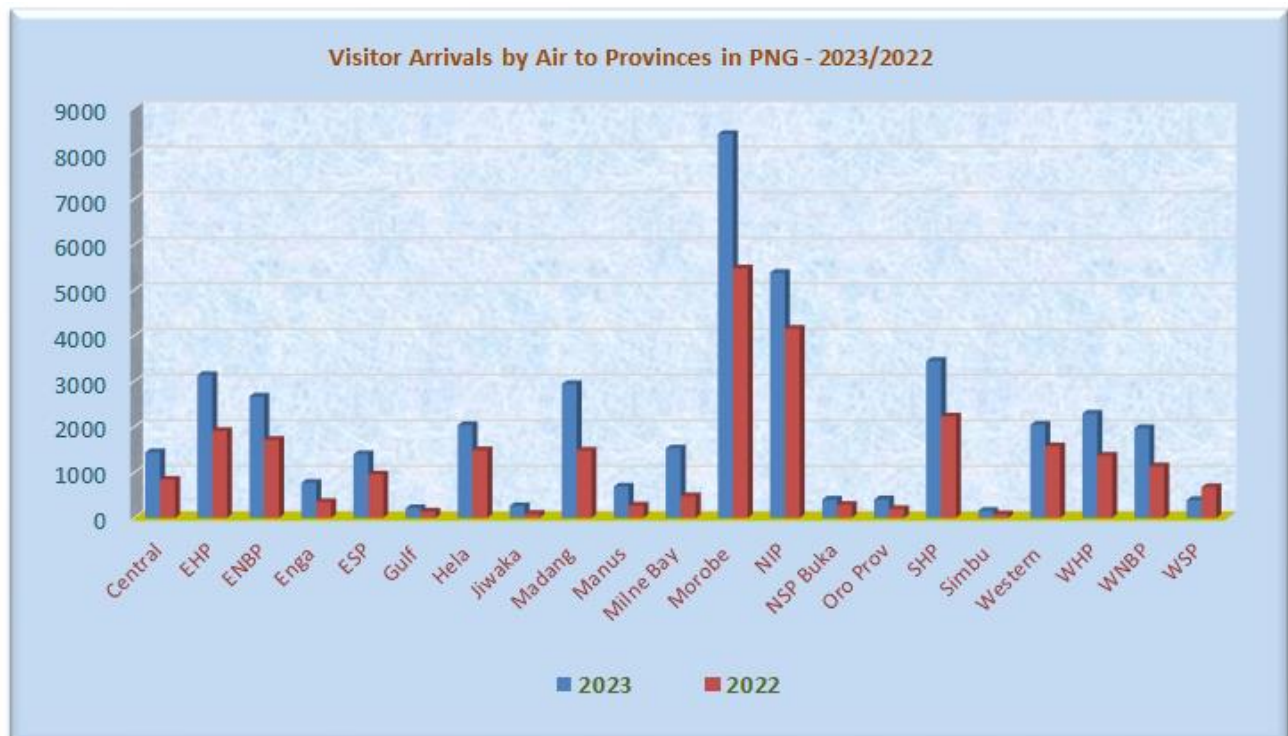


1.5 Areas/Provinces visited by international visitors in PNG

Port Moresby being the gateway to the country, visitor arrivals to the country remains high for the National Capital District (NCD).

The high visitation to Morobe, New Ireland, Western, Eastern Highlands, Southern Highlands and Hela Province is attributed to the increased business and mining activities in the areas, while most of those visiting Milne Bay, ENBP and Madang are mainly due to increase tourism activities in these provinces. New Ireland, East New Britain, Madang and Milne Bay received the highest number of tourists, followed by West New Britain, Western Highlands, East Sepik, West Sepik and other provinces.

Main Areas Visited & Purpose of Visit - 2023											
Main Areas	Purpose of Visit										Total 2023
	Business	MICE	Holiday	VFR	Employment	Educational	Medical	Sport	Church	Other	
Central Prov	264	9	226	287	558	33	0	0	25	39	1441
EHP	521	14	348	274	1504	105	1	4	174	192	3137
ENBP	469	21	634	279	1100	31	0	0	18	113	2665
Enga Prov	158	0	20	12	570	5	0	0	2	5	772
ESP	264	3	307	99	561	17	1	0	64	85	1401
Gulf Prov	26	0	16	18	131	0	2	0	21	1	215
Hela Prov	306	4	21	8	1660	5	1	1	2	29	2037
Jiwaka Prov	27	3	44	54	64	10	2	0	18	37	259
Kokoda	24	0	942	0	4	1	0	0	0	1	972
Madang Prov	380	12	241	179	1881	56	4	3	73	109	2938
Manus Prov	223	0	48	30	370	0	0	0	0	18	689
Milne Bay Prov	88	4	1025	95	263	8	1	0	24	19	1527
Morobe Prov	2017	34	607	535	4739	108	0	28	76	280	8424
NCD(POM)	21735	1069	9342	5895	25956	1027	59	1232	352	3107	69774
NIP	923	6	553	144	3644	25	1	4	11	67	5378
NSP Buka	107	6	54	93	118	5	1	0	10	9	403
Oro Prov	61	1	109	26	182	2	0	19	2	6	408
SHP	561	5	88	44	2713	6	0	0	17	13	3447
Simbu Prov	13	1	20	18	72	0	4	0	11	20	159
Western Prov	349	2	98	64	1467	17	2	0	14	34	2047
WHP	269	29	501	255	1073	26	2	1	57	77	2290
WNBP	244	22	685	126	804	24	0	0	12	53	1970
WSP	30	0	183	15	150	1	0	0	9	5	393
Total	29059	1245	16112	8550	49584	1512	81	1292	992	4319	112746



2023 Visitor Arrival Summary Table

Visitors Arrival Analysis														Total - 2023		January - December	
Country	Busins	MICE	VFR	Holiday	Cruise	Emplmnt	Educatn	Medical	Sports	Church	Other	Total 2023	Total 2022	Change	% (+/-)		
Australia	12866	338	4679	8445	31321	12843	388	21	916	176	1234	73227	23875	49352	207		
New Zealand	1345	47	273	344	0	1508	43	4	113	29	100	3806	2518	1288	51		
Oceania	1252	319	666	430	0	1679	258	4	167	90	383	5248	2275	2973	131		
China	2161	76	461	1218	0	7235	66	11	4	3	241	11476	3841	7635	199		
Japan	637	41	41	289	0	199	20	0	8	1	61	1297	639	658	103		
Korea	312	14	45	98	0	185	21	1	1	14	54	745	385	360	94		
Malaysia	904	17	165	228	0	2535	37	5	0	4	119	4014	3502	512	15		
Singapore	521	11	50	100	0	331	6	3	2	1	36	1061	522	539	103		
Philippines	1166	75	610	524	0	11124	193	5	9	97	472	14275	9657	4618	48		
Indonesia	826	18	94	101	0	2511	25	0	1	12	138	3726	2718	1008	37		
India	1129	42	274	272	0	2696	99	1	11	37	277	4838	3281	1557	47		
Other Asia	693	44	162	383	0	1497	41	2	2	15	167	3006	1795	1211	67		
United Kingdom	789	25	116	479	0	772	31	0	7	15	63	2297	1867	430	23		
Germany	146	5	49	323	0	168	10	2	2	23	41	769	567	202	36		
France	350	22	34	191	0	217	9	0	5	1	17	846	558	288	52		
Netherlands	92	3	39	71	0	113	14	1	1	22	21	377	226	151	67		
Other Europe	651	14	91	788	0	645	28	3	4	51	119	2394	1733	661	38		
USA	2051	79	465	1153	0	1394	144	9	27	340	552	6214	3540	2674	76		
Canada	232	16	57	165	0	448	8	2	1	22	47	998	642	356	55		
Other America	175	12	30	112	0	202	11	0	7	17	38	604	388	216	56		
Africa	532	22	119	136	0	949	49	3	1	13	103	1927	1617	310	19		
Russia	67	1	8	80	0	150	2	0	0	0	14	322	190	132	69		
Italy	88	4	12	85	0	86	6	1	2	8	7	299	151	148	98		
Scandinavia	18	0	5	22	0	24	3	3	0	1	4	80	67	13	19		
Chile	9	0	0	4	0	22	0	0	0	0	0	35	22	13	59		
Israel	47	0	5	72	0	50	0	0	1	0	11	186	200	-14	-7		
Total 2023	29059	1245	8550	16113	31321	49583	1512	81	1292	992	4319	144067	66776	77291	70		
Total 2022	16162	327	5041	5675	2600	34573	669	61	171	650	3447						
Change	12897	918	3509	10438	28721	15010	843	20	1121	342	872						
% (+/-)	80	281	70	184	1105	43	126	33	656	53	25						

1.6 Tourism Arrival Trends & Forecast (2019 – 2024)

In 2019, total arrivals of 210,980 was recorded, an increase of 8% compared to 2018. This was the highest record registered in that year. However, international arrival around the world was hit hard by the Coronavirus Pandemic and PNG recorded decrease in visitor numbers in 2020 through to 2021. In 2022, arrivals started to pick up slowly, and in 2023 healthy growth was seen from all the markets.



***Bar in blue is forecast**

In 2024, about 140,000 international visitors will have visited Papua New Guinea. The growth will be supported strongly by the implementation of the TPA plans and Air Niugini's plan to expand its flight services to other international and domestic destinations. Increased marketing activities and developing, and packaging of new tourism products by the tourism industry partners will also determine the predicted growth in visitor arrival numbers to PNG.

According to UNWTO, International tourism showed robust performance in 2023, with arrivals reaching 88% of pre-pandemic levels in the twelve months of 2023. An estimated 1.3 billion tourists travelled internationally between January and December 2023, (34%) higher than the number recorded in the same period of 2022. Results were boosted by improved confidence levels and the lifting of restrictions in an increasing number of destinations.

The safe resumption of international tourism will continue to depend largely on a coordinated response among countries in terms of travel restrictions, harmonized safety and hygiene protocols and effective communication to help restore consumer confidence. This is particularly critical at a moment when cases are surging in some regions and new Covid-19 variants are emerging in different parts of the world. Therefore, it is important at this time to take proactive steps to grow domestic tourism as well to help our tourism industry recover quickly, whilst we continue to maintain online presence to connect with our potential international tourists/visitors.

Conclusion

PNG after experiencing a healthy growth in visitor arrival numbers in the past, numbers declined sharply in 2020 and 2021 as a result of the Covid-19 pandemic that brought down the tourism industry worldwide to its lowest on record. However, as many destinations have started to re-open their international borders and allowing fully vaccinated tourists/visitors to travel, arrival numbers started to pick up in 2022 and 2023. Therefore, we must be prepared to meet the demand/needs of our tourists/visitors because travel patterns and product needs in the markets are fast changing and destinations around the world are now adapting to the new changes to remain competitive in the market place. As such, TPA must work closely with tour operators and product owners to diversify the current tourism products and develop new tourism packages to meet the demand/needs of our local and international tourists.

.....*THANK YOU*.....

FOR MORE INFORMATION, CONTACT:

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