

# PAPUA NEW GUINEA

International Visitor Survey Report  
June – November 2023

SOLO



# Acknowledgements

- ❖ The Pacific Tourism Organisation (SPTO) expresses its gratitude to all contributors to this report on IVS data from June to November 2023, which provides insights into the visitor experience and tourism recovery in Papua New Guinea post-border reopening.
- ❖ Thank you to the visitors for completing arrival and departure cards, enabling this analysis. Special thanks to the Papua New Guinea Tourism Promotion Authority (PNGTPA) for providing crucial arrival data and visitor emails to enable survey invitations to be dispatched in a timely manner.
- ❖ We also extend our sincere thanks to the New Zealand Government for their support and collaboration.
- ❖ Appreciation goes to the SPTO researchers and analysts for their meticulous work on visitor profiles, decision-making processes, and expenditure and satisfaction.
- ❖ Further research is needed to refine economic impact estimates, particularly the rate of prepaid expenditure into the local economy. Your ongoing support is highly valued.
- ❖ Thank you to everyone involved.

# Background

- ❖ The 2023 June-November PNG International Visitor Survey is an initiative of the Pacific Tourism Data Initiative, funded by the Zealand Ministry of Foreign Affairs and Trade (NZMFAT), and is conducted by the Pacific Tourism Organisation (SPTO).
- ❖ IVS data from June to November 2023 is analysed to help us understand the visitor experience and gain insights into tourism recovery in Papua New Guinea after the border reopening.
- ❖ The report includes key sections on visitor profiles and characteristics, information and decision-making, visitor expenditure and satisfaction.
- ❖ **N.B.** The June to November visitor emails were collected through the passenger arrival and departure cards completed by visitors on their arrival into, and departure from, Papua New Guinea.
- ❖ **N.B.** The estimated rate of prepaid expenditure flowing into local economy is 65%, which is observed from other Pacific Island countries that have their own international airlines. It is estimated that Pacific island countries without their own international airlines have a flowing back rate of less than 40%. Further research is warranted to establish more accurate estimates.
- ❖ All amounts are reported in **USD** and **PGK** currency using average annual rates.

# Disclaimer

- ❖ **Reproduction of Material** - Information contained within this publication, including all charts, information, and graphical representations, may be used, reproduced, or published without prior approval from SPTO and PNGTPA. However, the information source must be explicitly referenced and acknowledged in all modes of representation.
- ❖ The **survey instrument** used to collect data for the June to November 2023 period was similar, but not exact, to the survey instrument used in the June 2022 to May 2023 period. New questions were added, a handful of existing questions were removed, and the response options for some questions were altered. In those instances where comparisons cannot be made, we report only the results for the June to November 2023 period.
- ❖ **N.B.** Our analysis uses IVS respondents, weighted with June to November 2023 arrival data from the Papua New Guinea Tourism Promotion Authority (PNGTPA) to ensure a representative sample. However, as with all sample-based data, some bias may remain. Users should consider this when interpreting the results.
- ❖ Please note that the Pacific Tourism Organization (SPTO) and the Papua New Guinea Tourism Authority (PNGTPA) **do not accept liability for any loss or damage incurred as a result of the use of information contained in this report.** Users are advised to exercise their own judgment in the use of any information provided.

# IVS Respondents (June – November 2023)



**10,943** TOTAL EMAILS SENT



**800** TOTAL RESPONSES RECEIVED

**7%**

CONVERSION RATE

## RESPONSES COVERED



**941** ADULTS



**144** CHILDREN

**2%**

OF ALL VISITORS IN THIS PERIOD

SUMMARY OF KEY FINDINGS 2022 vs. 2023

Jun-Nov 2022



COUNTRY OF ORIGIN

45%  
AU

23%  
Asia

9%  
North  
America

11%  
Europe

4%  
Pacific



12%  
Visitors are 70 years old or over.



3ppl  
Avg. number of travel companions.



49%  
Visitors visited for the first time.



\$88,481  
Average household income.

Note: US dollars.

Jun-Nov 2023



COUNTRY OF ORIGIN

38% ▼  
AU

38% ▲  
Asia

4% ▼  
North  
America

7% ▼  
Europe

5% ▲  
Pacific



11% ▼  
Visitors are 70 years old or over.



2ppl ▼  
Avg. number of travel companions.



46% ▼  
Visitors visited for the first time.



\$93,258 ▲  
Average household income.

SUMMARY OF KEY FINDINGS 2022 vs. 2023

Jun-Nov 2022



PURPOSE OF VISIT



3.9/5  
Overall, visitors are very satisfied.



84%  
Visitors are willing to recommend.



91%  
Visitors are willing to return.

Jun-Nov 2023



PURPOSE OF VISIT



4/5 ▲  
Overall, visitors are very satisfied.



85% ▲  
Visitors are willing to recommend.



86% ▼  
Visitors are willing to return.

JUN-NOV 2022

USD 57 MILLION

FROM 20,537 VISITORS



PREPAID  
EXPENDITURE



IN-COUNTRY  
SPEND

\$2,728

Prepaid per visitor per trip

\$84

In-country spend per day

65%

Flowing into  
local economy  
rate



x 11.8 nights  
Average length of  
stay

\$1,773

Prepaid per visitor per trip

\$988

In-country spend per trip



ECONOMIC  
IMPACT

\$2,761 per visitor per trip

\$234 per visitor per day

JUN-NOV 2023

USD 182 MILLION

FROM 60,277 VISITORS ▲



PREPAID  
EXPENDITURE



IN-COUNTRY  
SPEND

\$3,138 ▲

Prepaid per visitor per trip

\$84 =

In-country spend per day

65%

Flowing into  
local economy  
rate



x 11.7 nights ▼  
Average length of  
stay

\$2,040 ▲

Prepaid per visitor per trip

\$985 ▼

In-country spend per trip



ECONOMIC  
IMPACT

\$3,025 per visitor per trip ▲

\$259 per visitor per day ▲

Note: US dollars. All amounts are per person

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

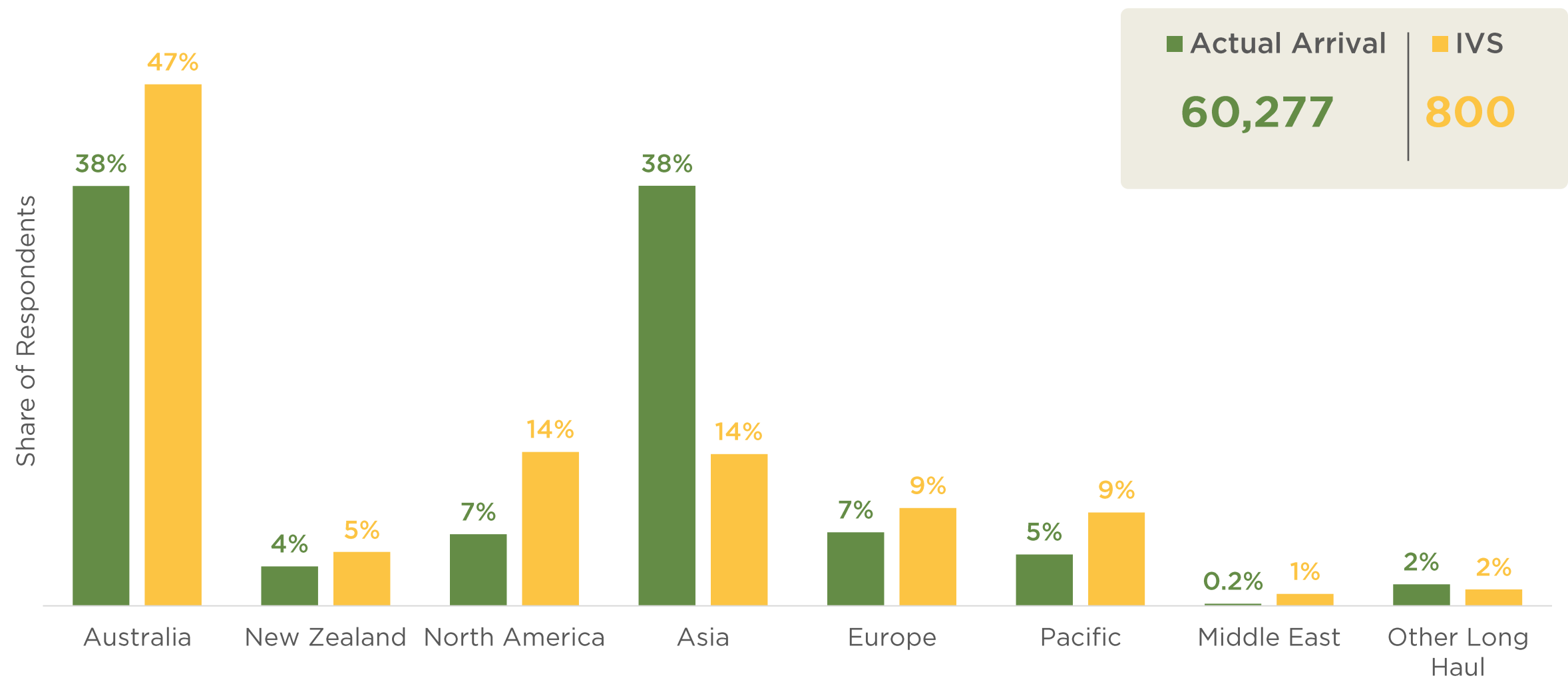


Visitor Spending  
& Impact



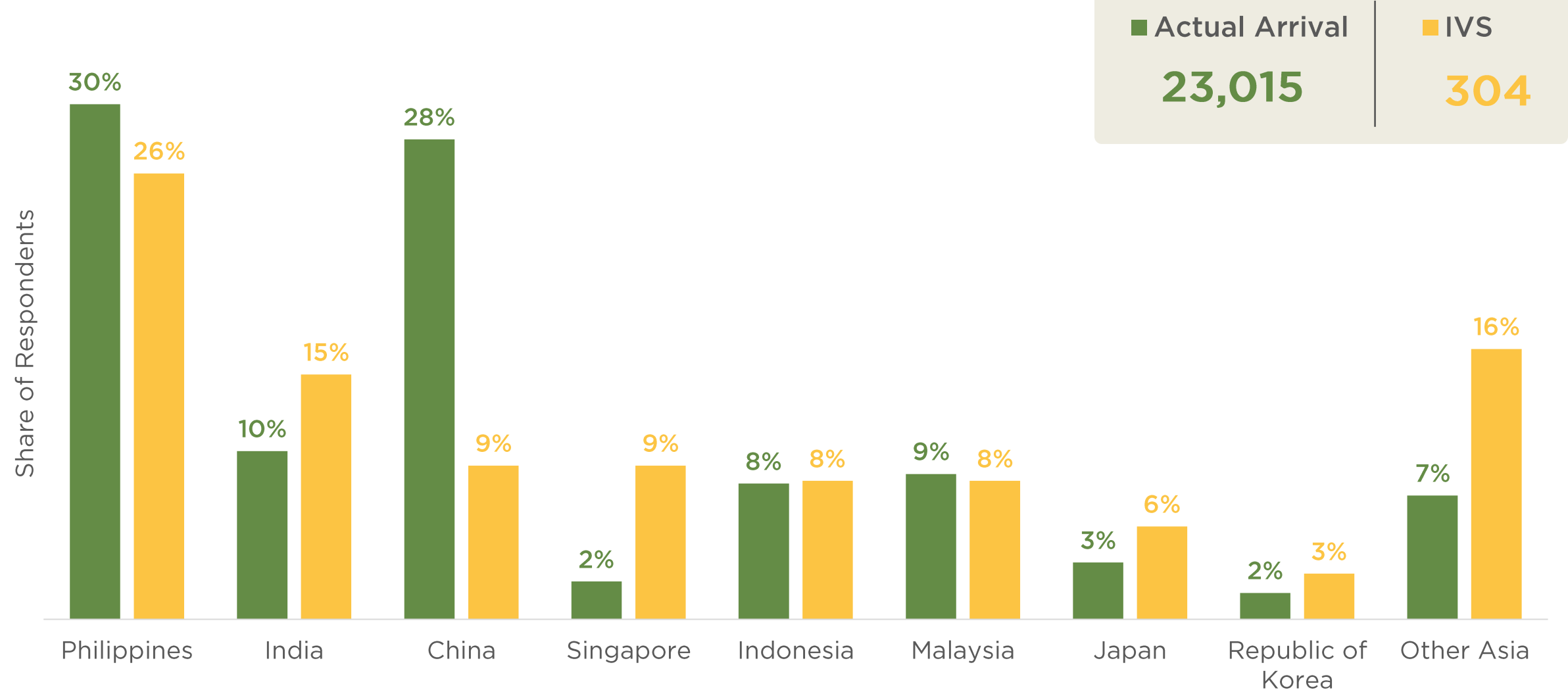
Visitor  
Satisfaction

# Country of Origin: IVS Respondents vs. Actual Arrival



Note: Survey data (unweighted)

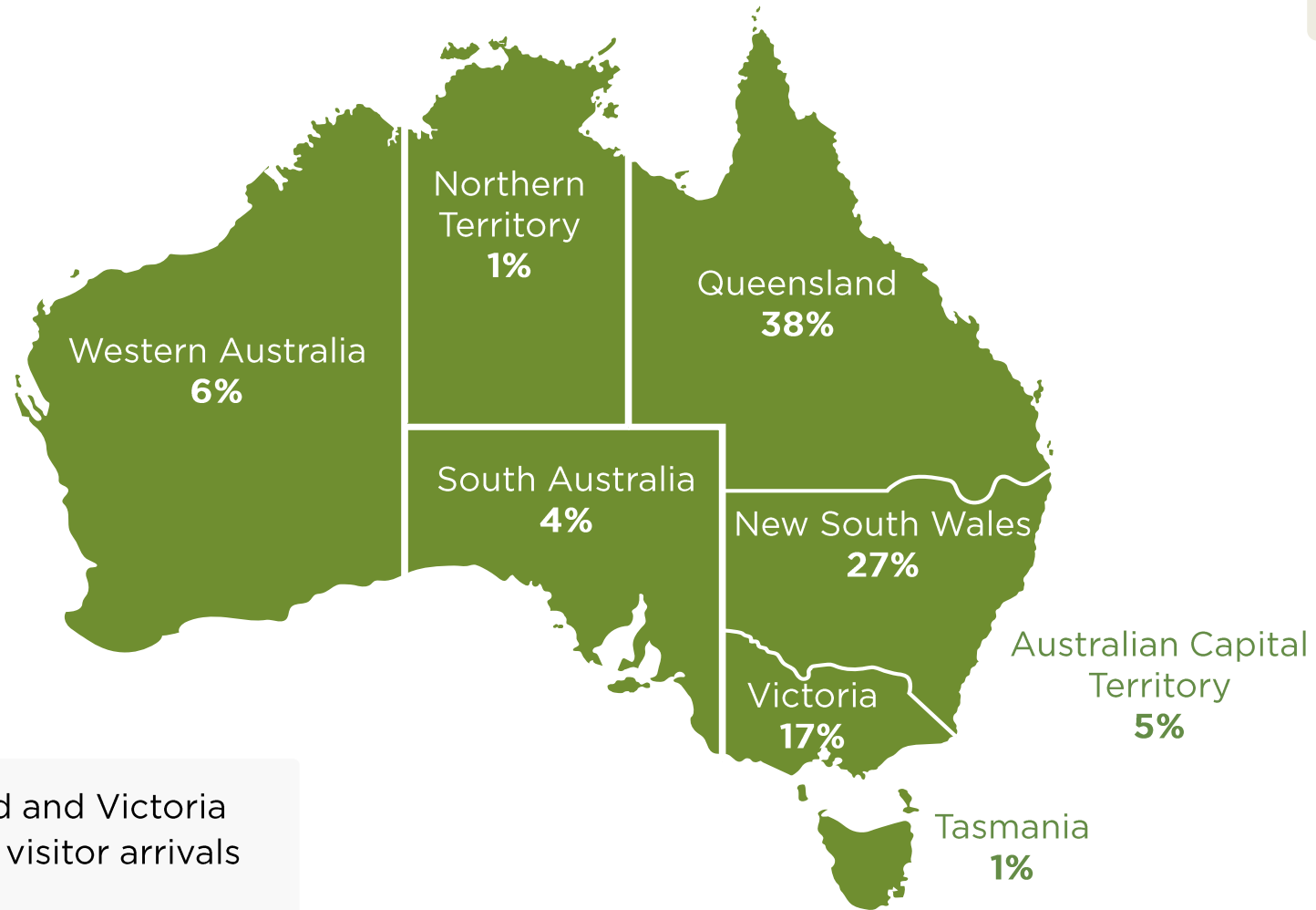
# Asia – IVS Respondents vs. Actual Arrival



Note: Survey data (unweighted)

# Australia Respondents - IVS Respondent Data

TOTAL  
**305**  
AU VISITORS

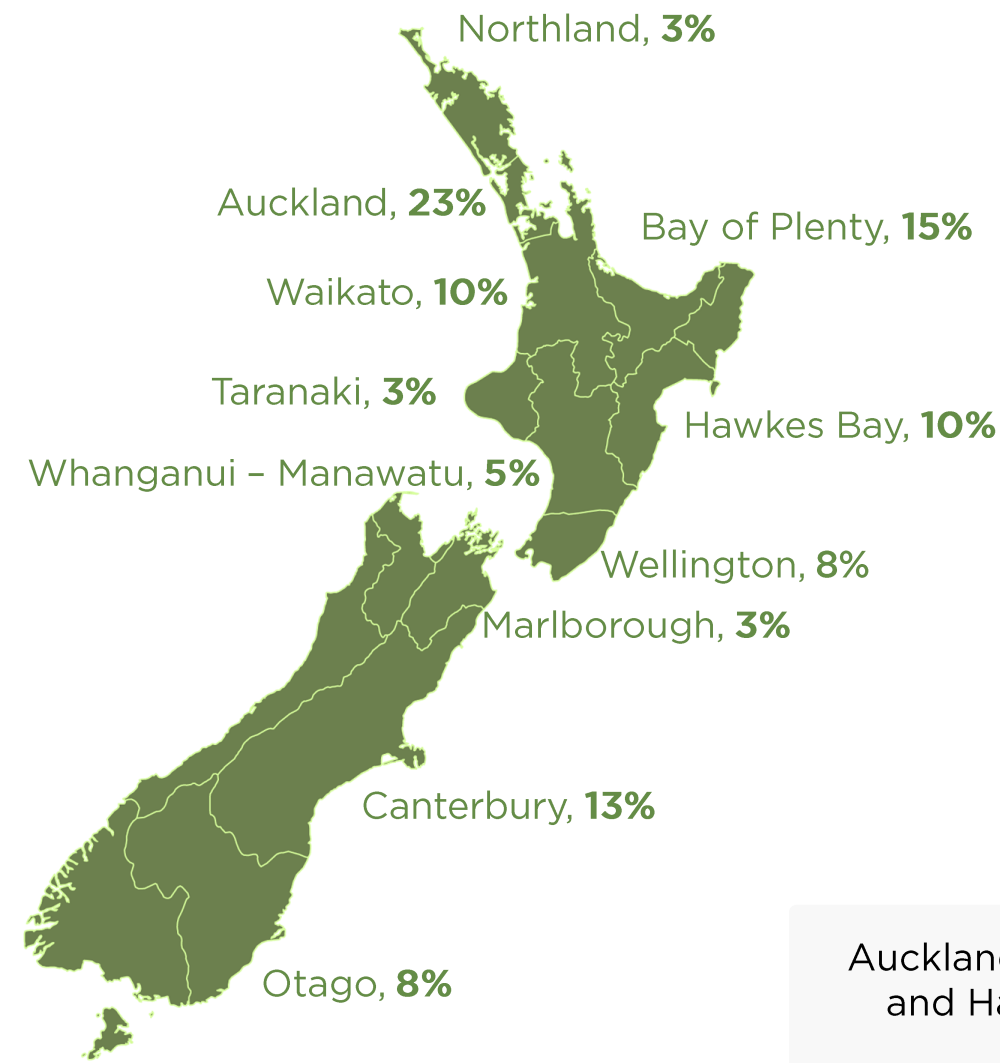


New South Wales, Queensland and Victoria make up **82%** of all Australian visitor arrivals

*Note: due to rounding, total does not sum to 100%*

# New Zealand Respondents - IVS Respondent Data

TOTAL  
**29**  
NZ VISITORS

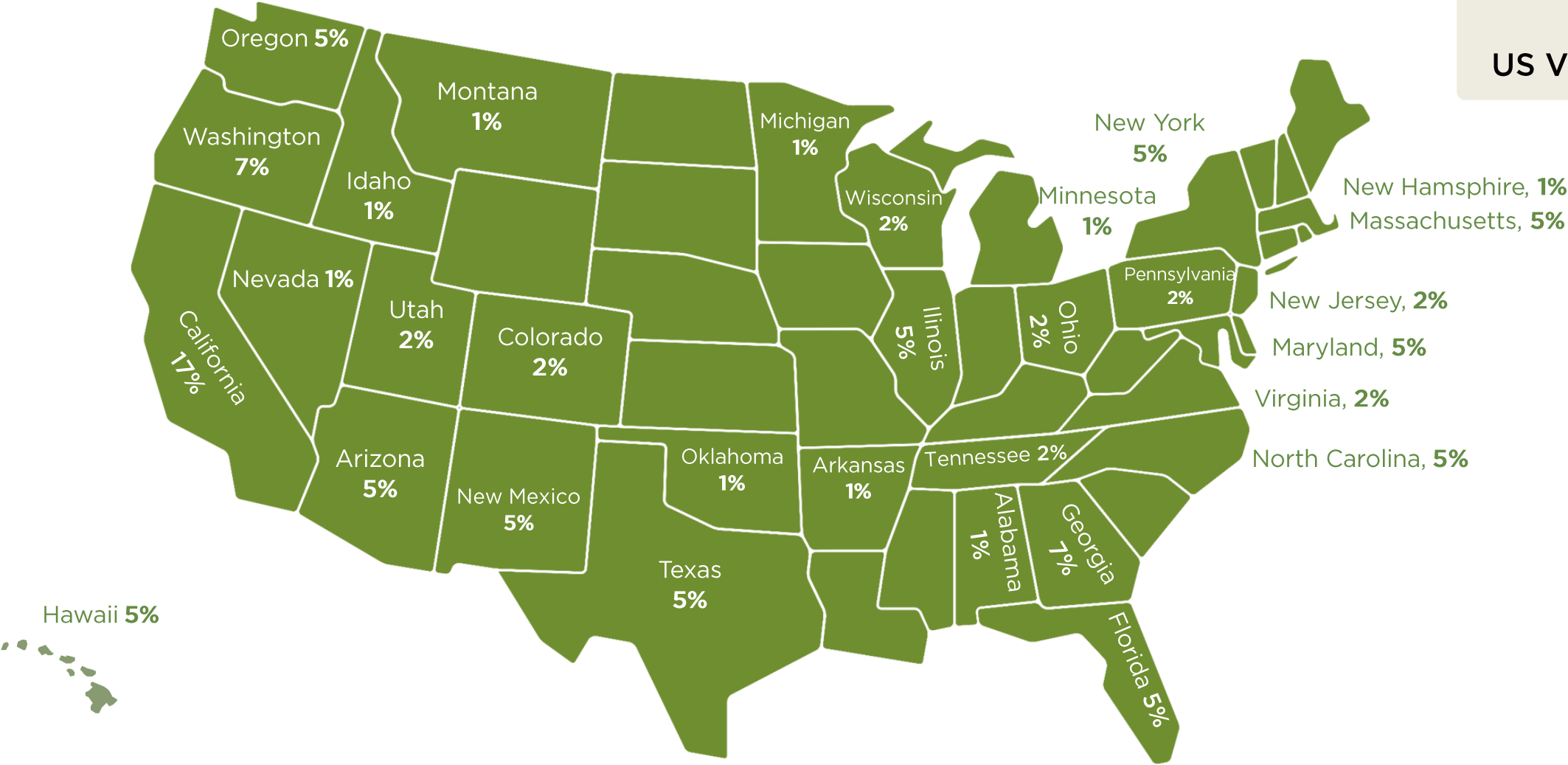


Auckland, Waikato, Bay of Plenty, Canterbury, and Hawkes Bay made up **72%** of all New Zealand respondents

*Note: due to rounding, total does not sum to 100%. Nelson, Southland, West Coast and Gisborne were regions not captured in this survey but will be included as response choices during the next review of the survey instrument*

# United States Respondents - IVS Respondent Data

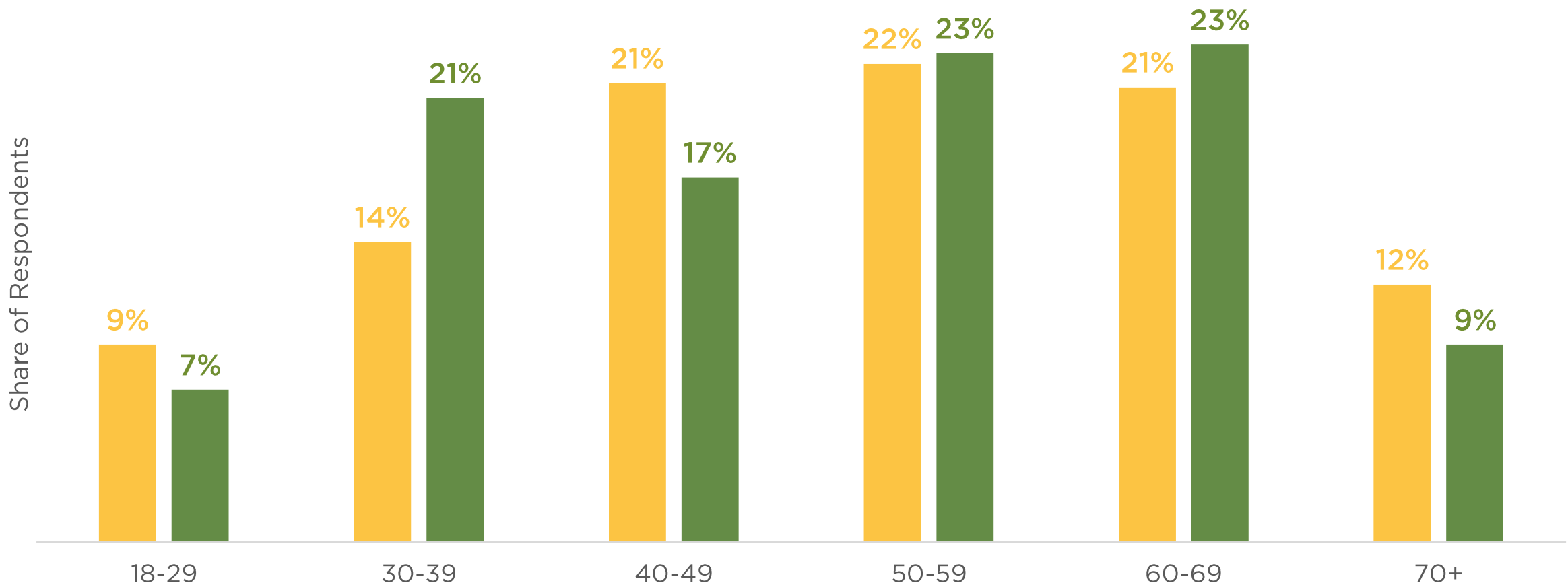
TOTAL  
**41**  
US VISITORS



California, Georgia, Washington, Arizona, Hawaii, Oregon, Texas, Florida, Illinois, Maryland, Massachusetts, New York and North Carolina made up **74%** of all American respondents

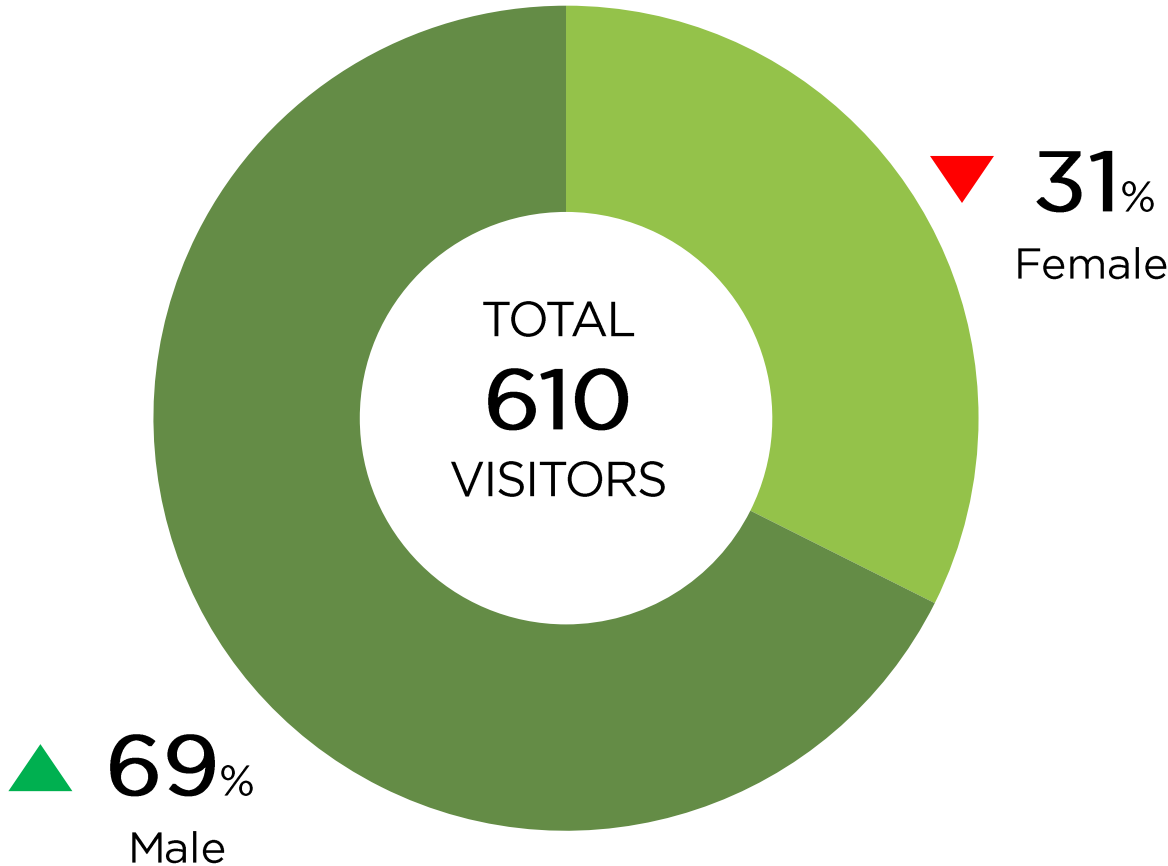
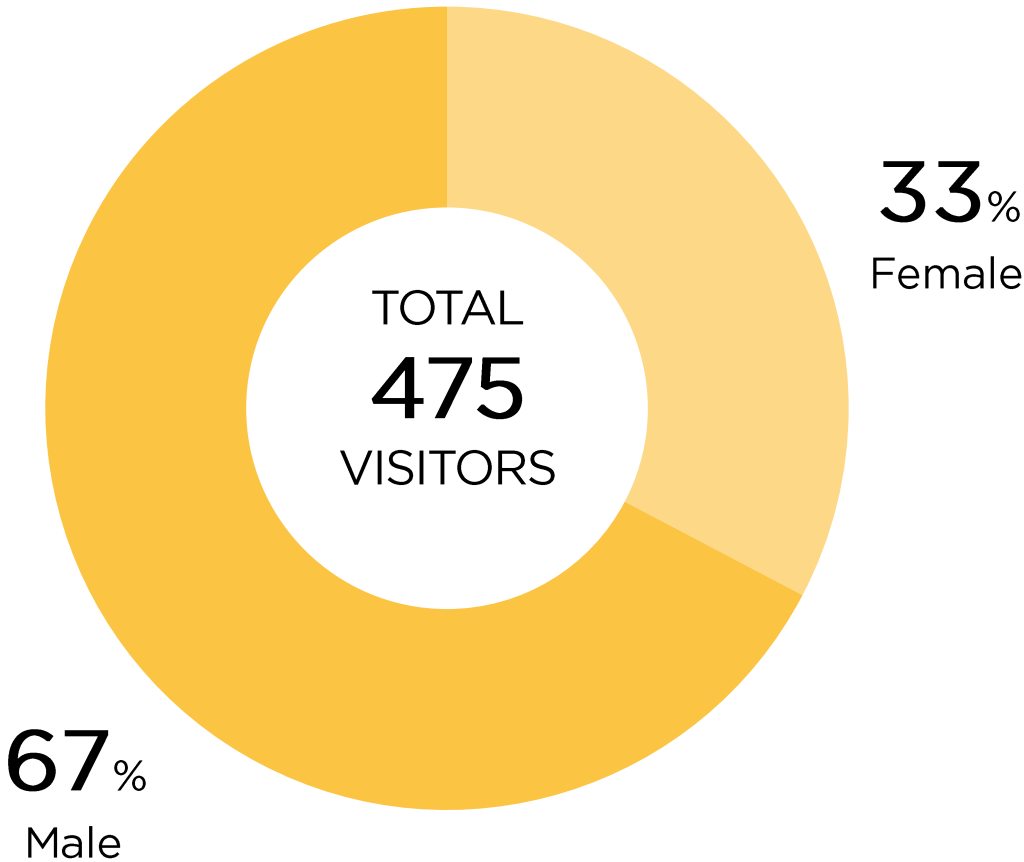
*Note: due to rounding, total does not sum to 100%*

# Age Group

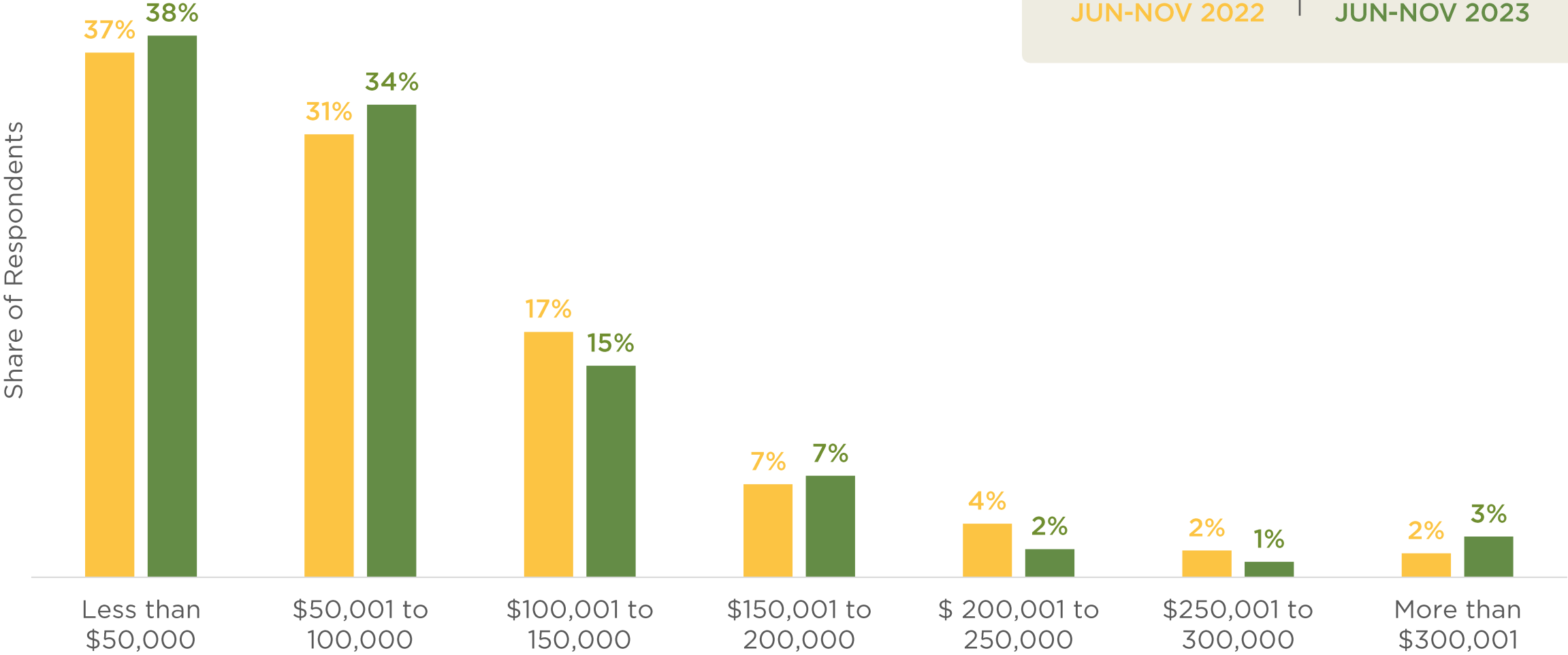


*Note: Due to rounding, total does not sum to 100%*

Gender – June-Nov 2022 | June-Nov 2023



# Annual Household Income (USD)



*Note: US dollars. Amounts above 1 million USD per annum are considered outliers.*

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making

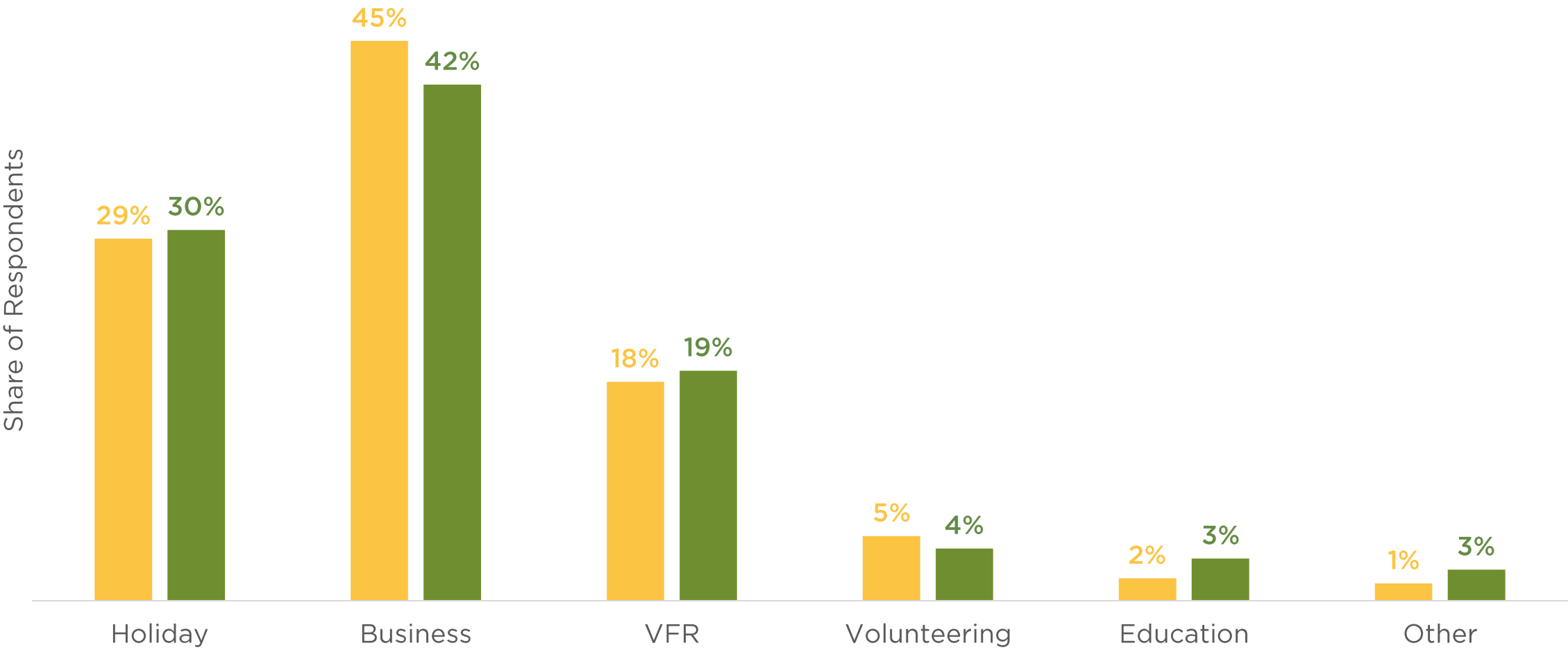


Visitor Spending  
& Impact



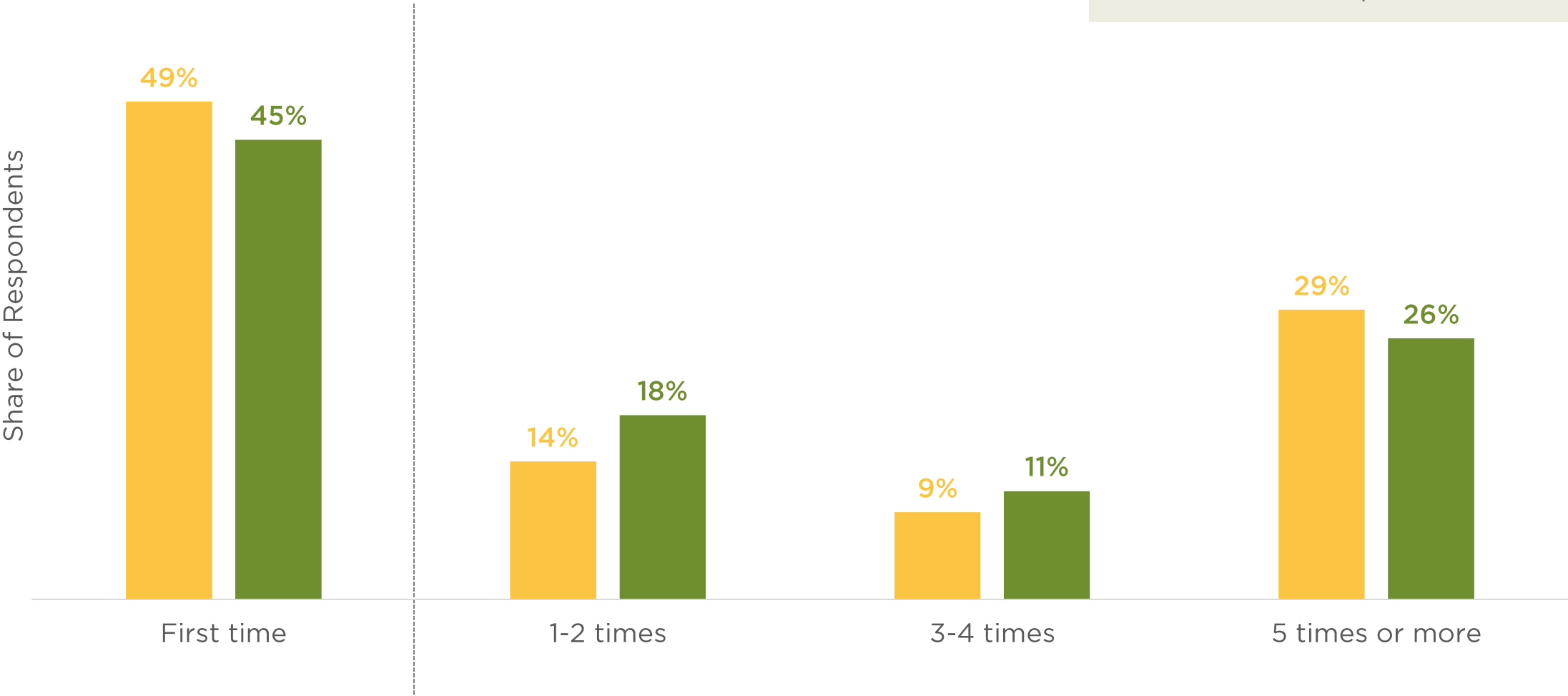
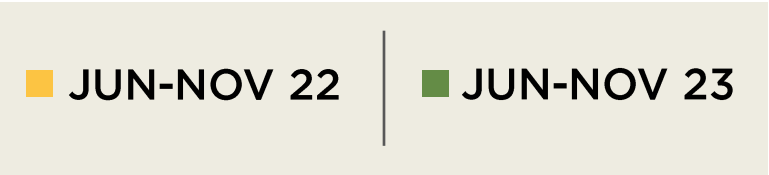
Visitor  
Satisfaction

# Purpose of Visit



*Note: Due to rounding, total does not sum to 100%*  
1. "Conference" is incorporated into "Business"  
2. "Special event – cultural", "Ocean Cruise and Adventures" and "Sport including special events" are incorporated into "Holiday"

# Previous Visits



*Note: Due to rounding, total does not sum to 100%*

# Length of Stay (nights)

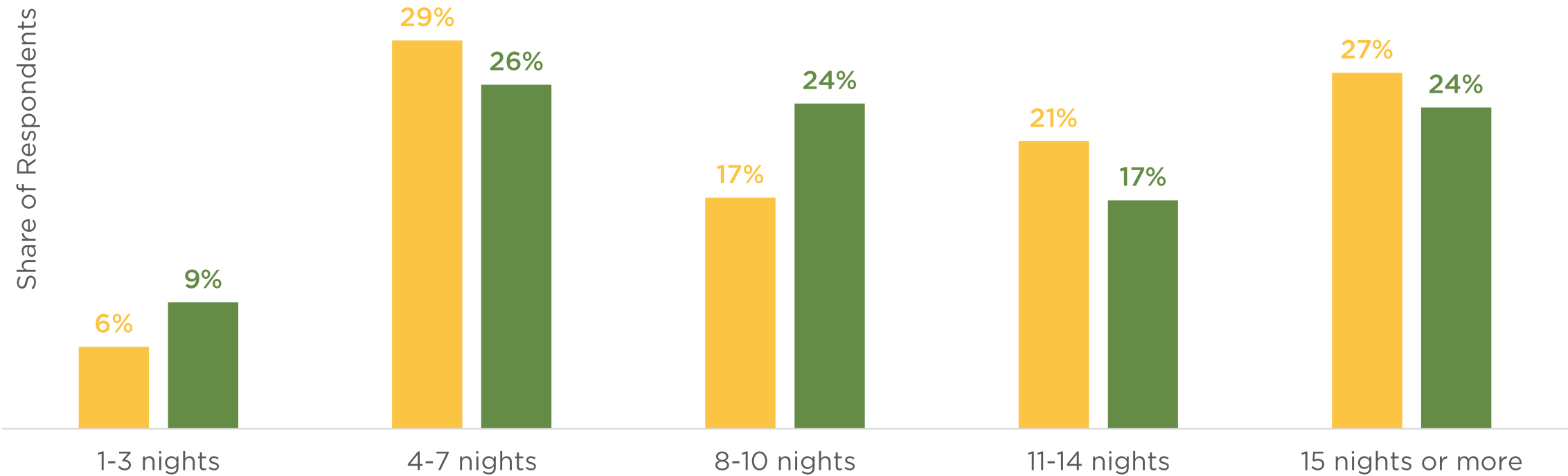
Avg. Length of Stay (nights)

11.8

JUN-NOV 2022

11.7

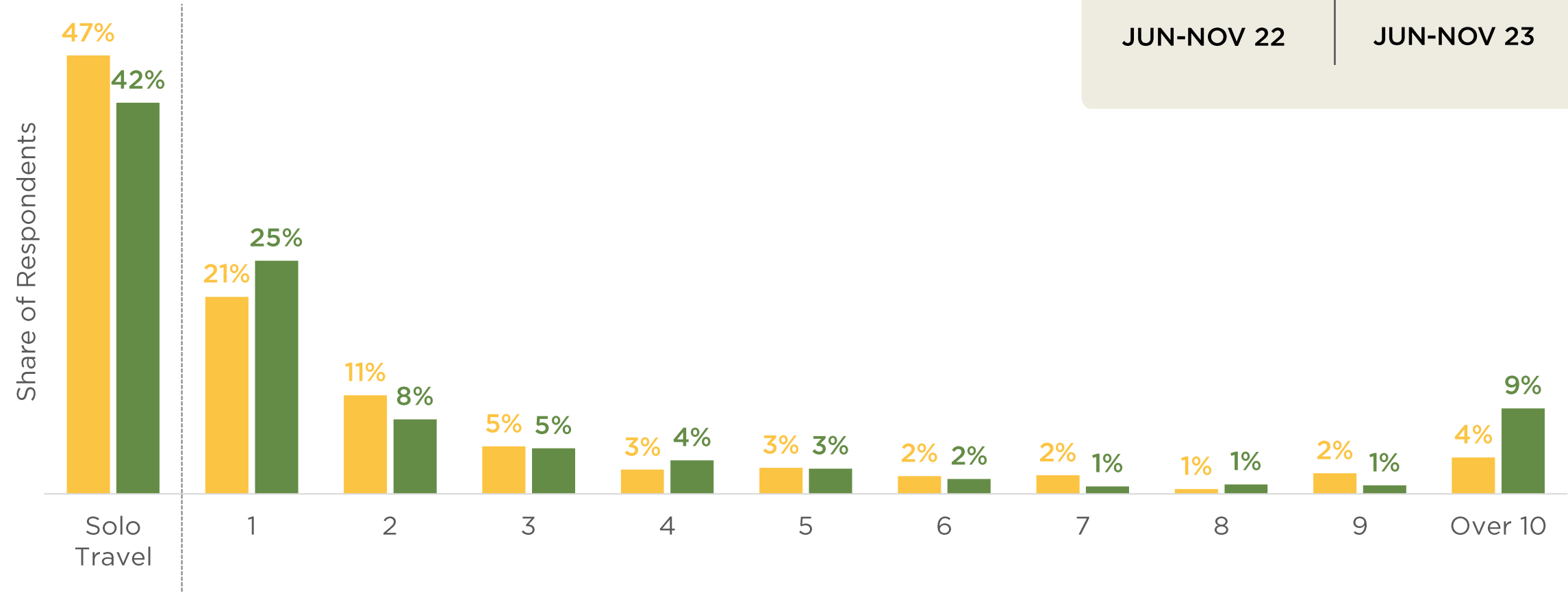
JUN-NOV 2023



*Note: 31 and 31+ days as outliers were removed for length of stay analysis.*

# Number of Travel Companions

Travel Companions			
Median	2	Median	1
Mean	3	Mean	2
JUN-NOV 22		JUN-NOV 23	



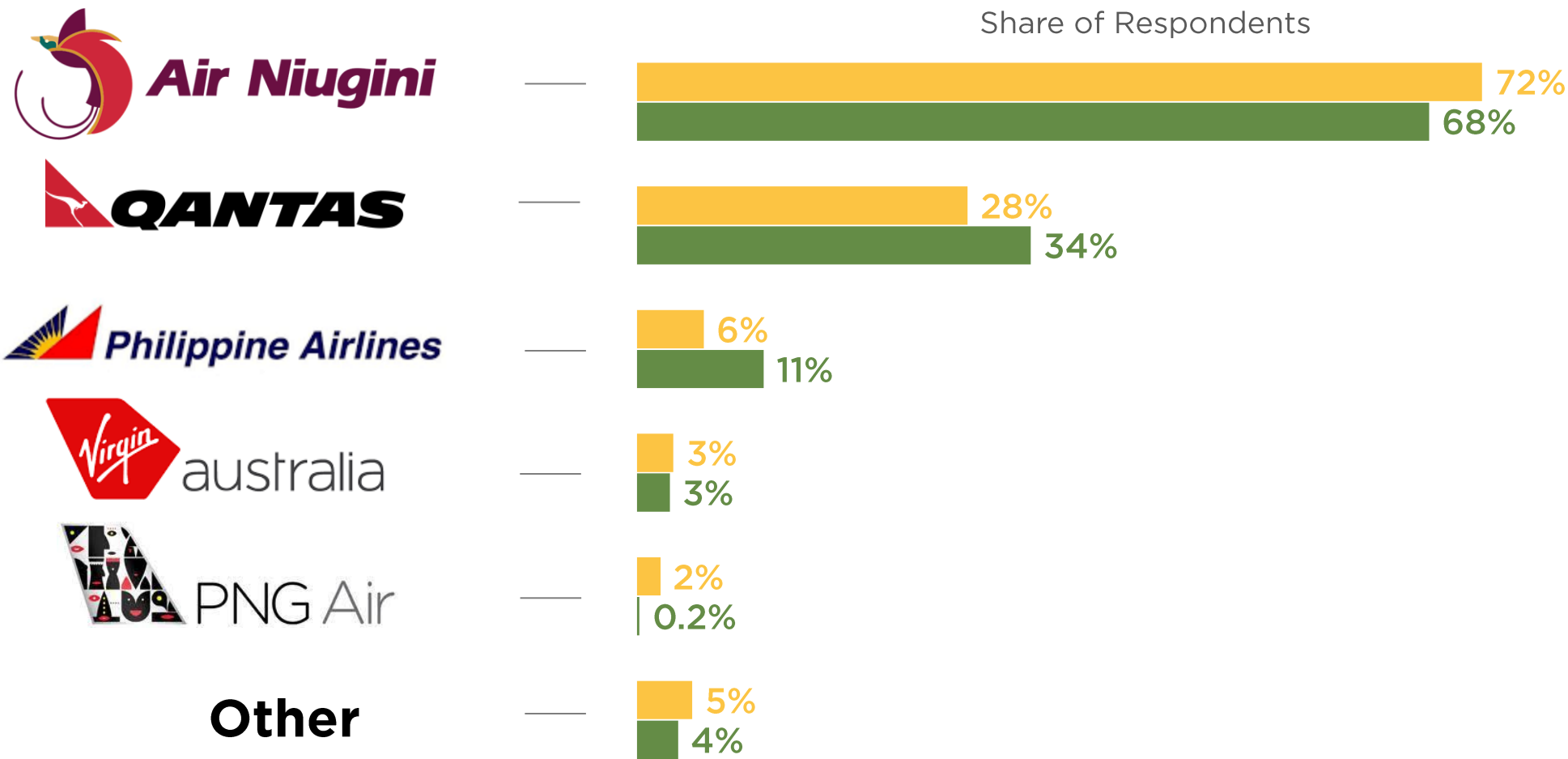
*Note: Due to rounding, total does not sum to 100%. Respondents who traveled by themselves or with 10 or more travel companions, were excluded from the mean and median calculations*

# Airlines Used for Travel

JUN-NOV 22

JUN-NOV 23

Share of Respondents



(Singapore Airlines, Fiji Airways, Turkish Airways,  
Qatar Airways, Air Canada, Emirates, United Airlines,  
Citilink, Solomon Airlines etc.)

Note:  
1. Multiple responses, therefore total does not add up to 100%  
2. "Other" modes of travel include Military Defence Aircraft, Medical Ship etc.

## Other modes of travel – June-Nov 2022 | June-Nov 2023



**Cruise Ship**

**Jun-Nov 23 - 1%**



**Private Charter Plane**

**Jun-Nov 23 - 0.6% ▼**

**Jun-Nov 22 - 1.4%**



**Private Boat**

**Jun-Nov 23 - 0.4% ▲**

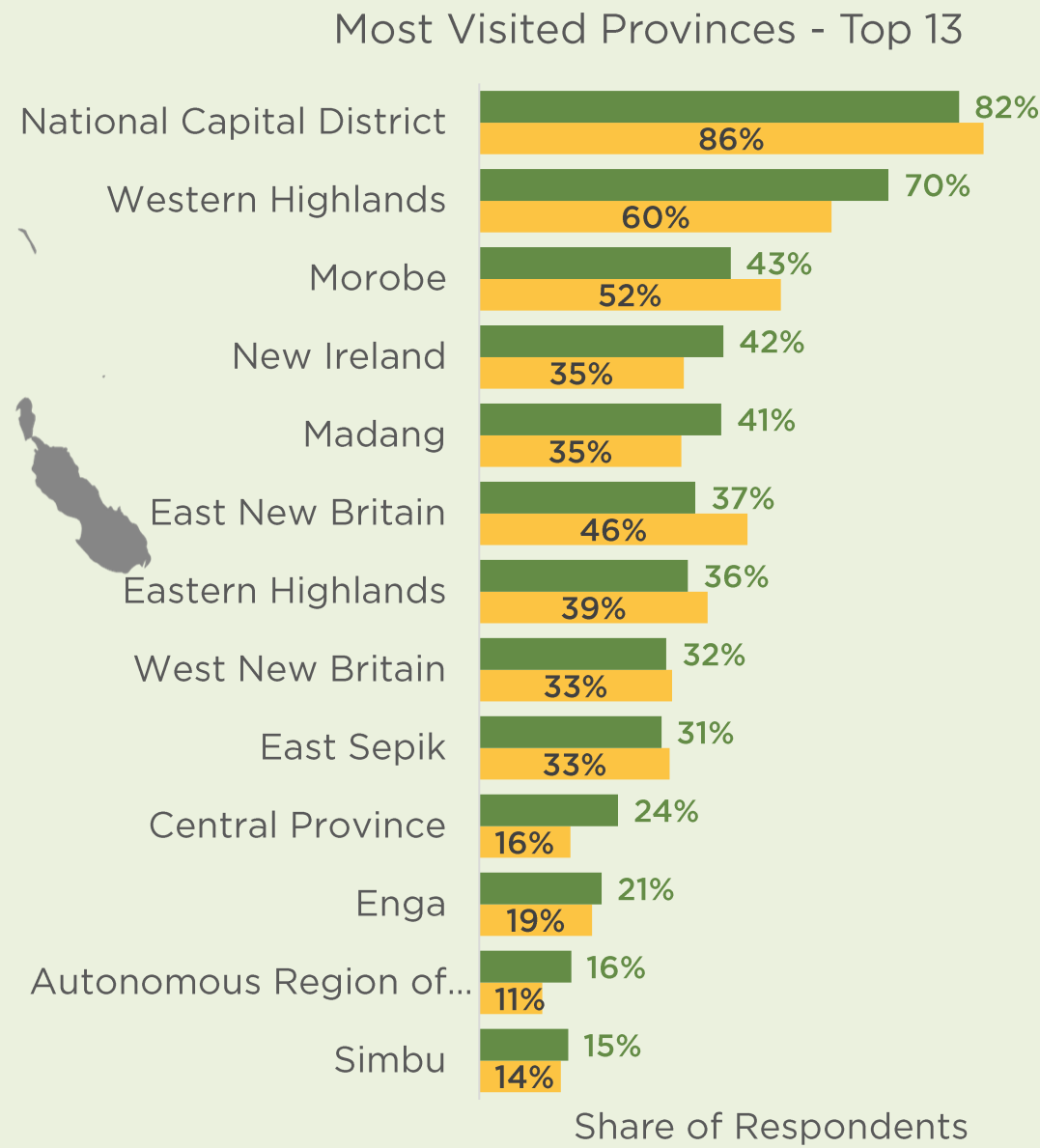
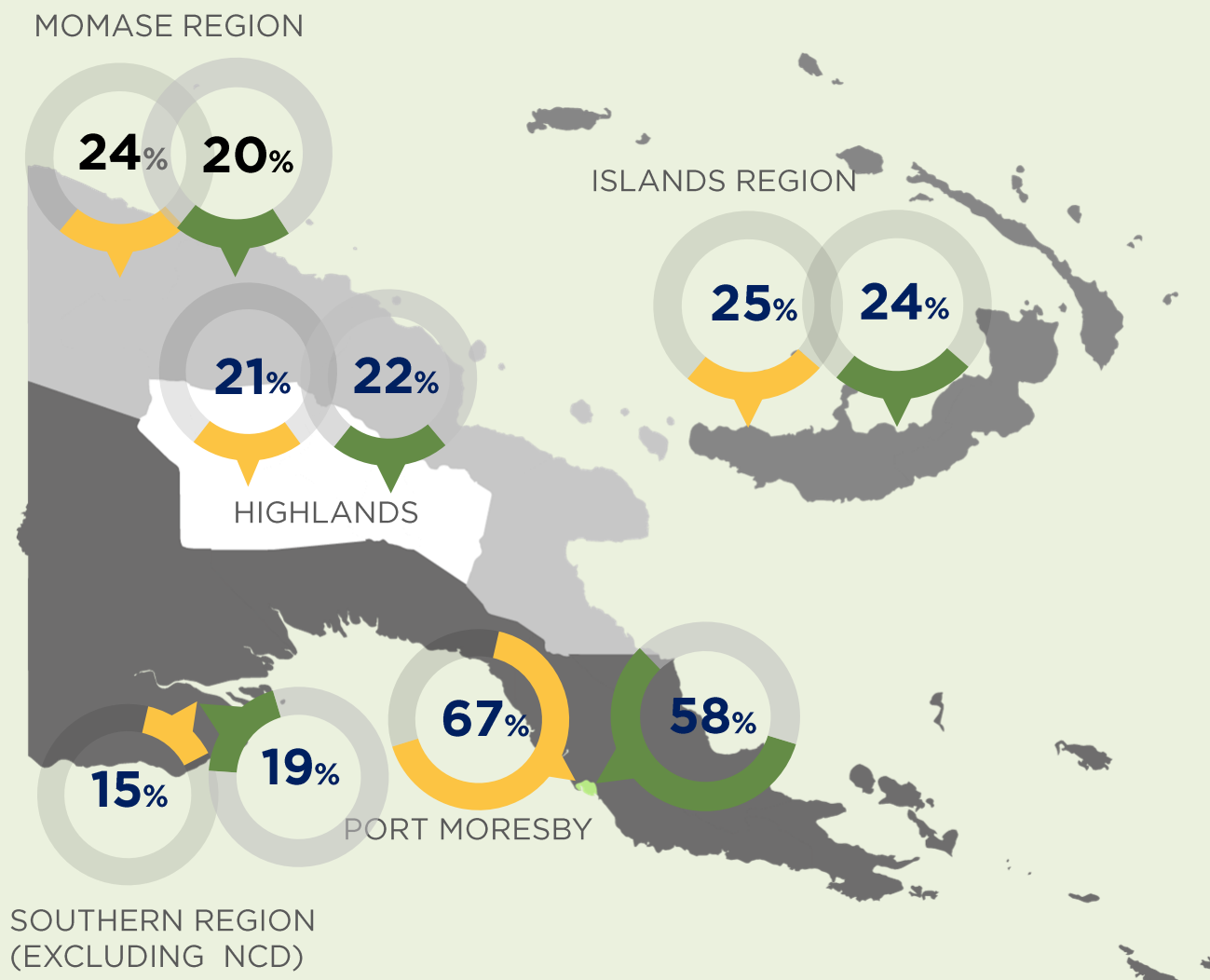
**Jun-Nov 22 - 0.2%**

*Note:*

*1. Multiple responses, therefore total does not add up to 100%*

*2. Cruise Ship is a new category*

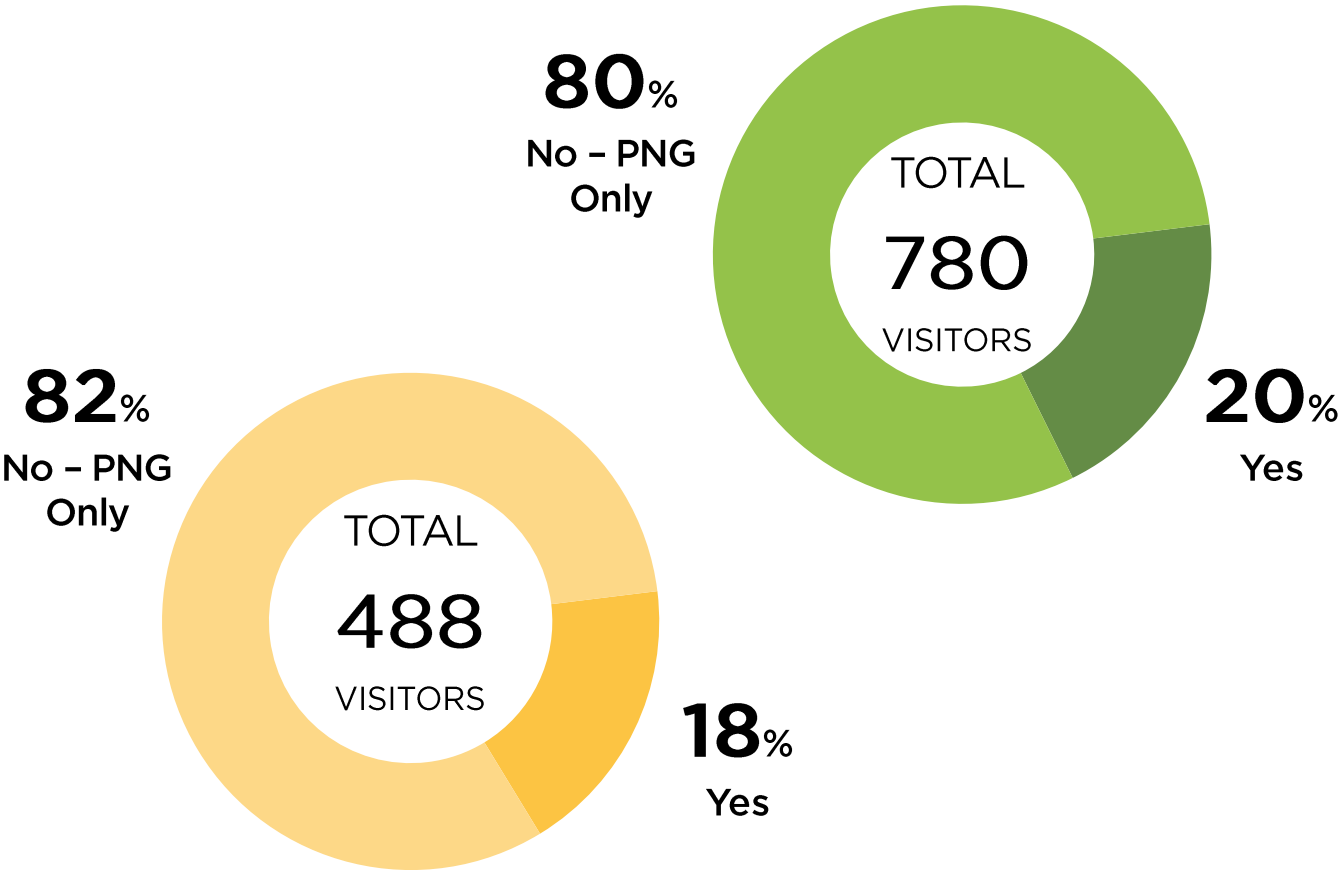
# Islands Visited - June-Nov 2022 | June-Nov 2023



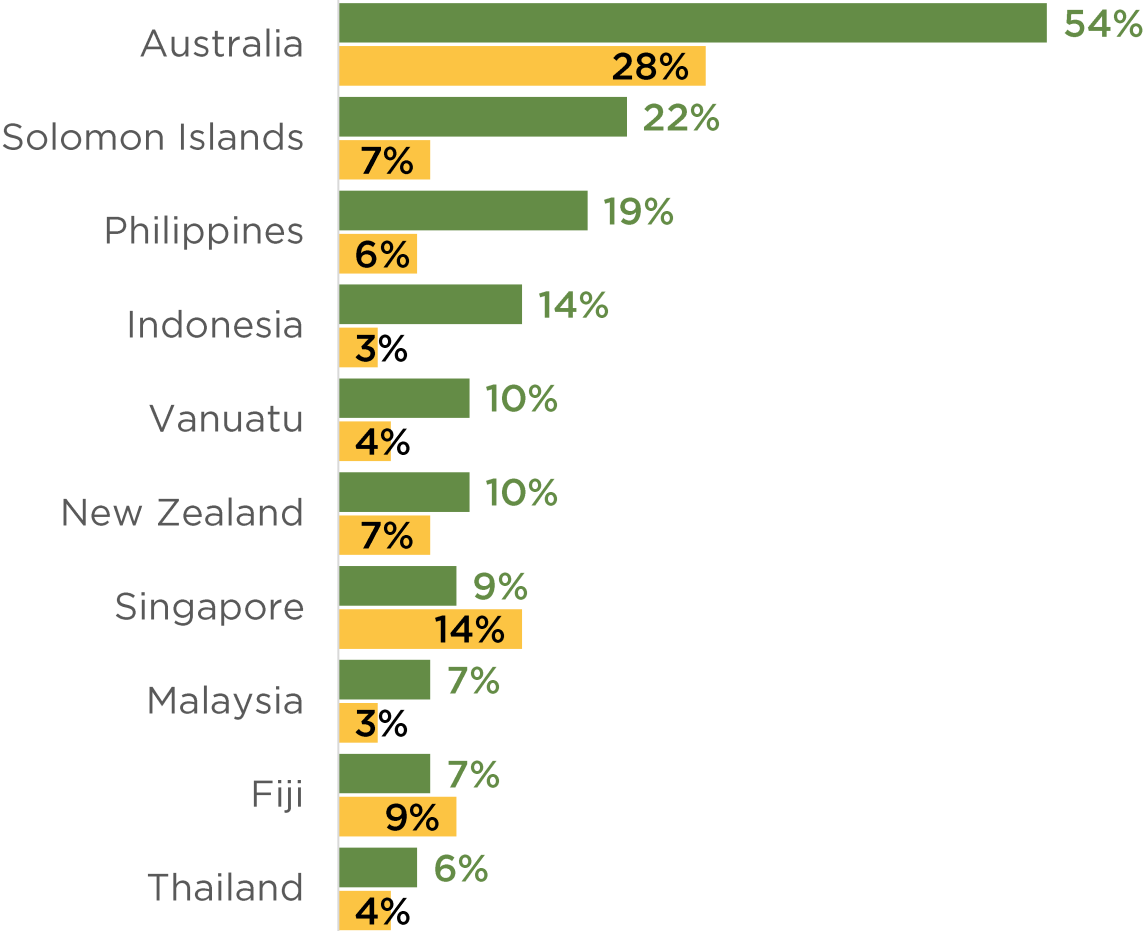
Note: Multiple responses, therefore total does not add up to 100%

# Destinations – June-Nov 2022 | June-Nov 2023

**Q** Was PNG part of a bigger trip?



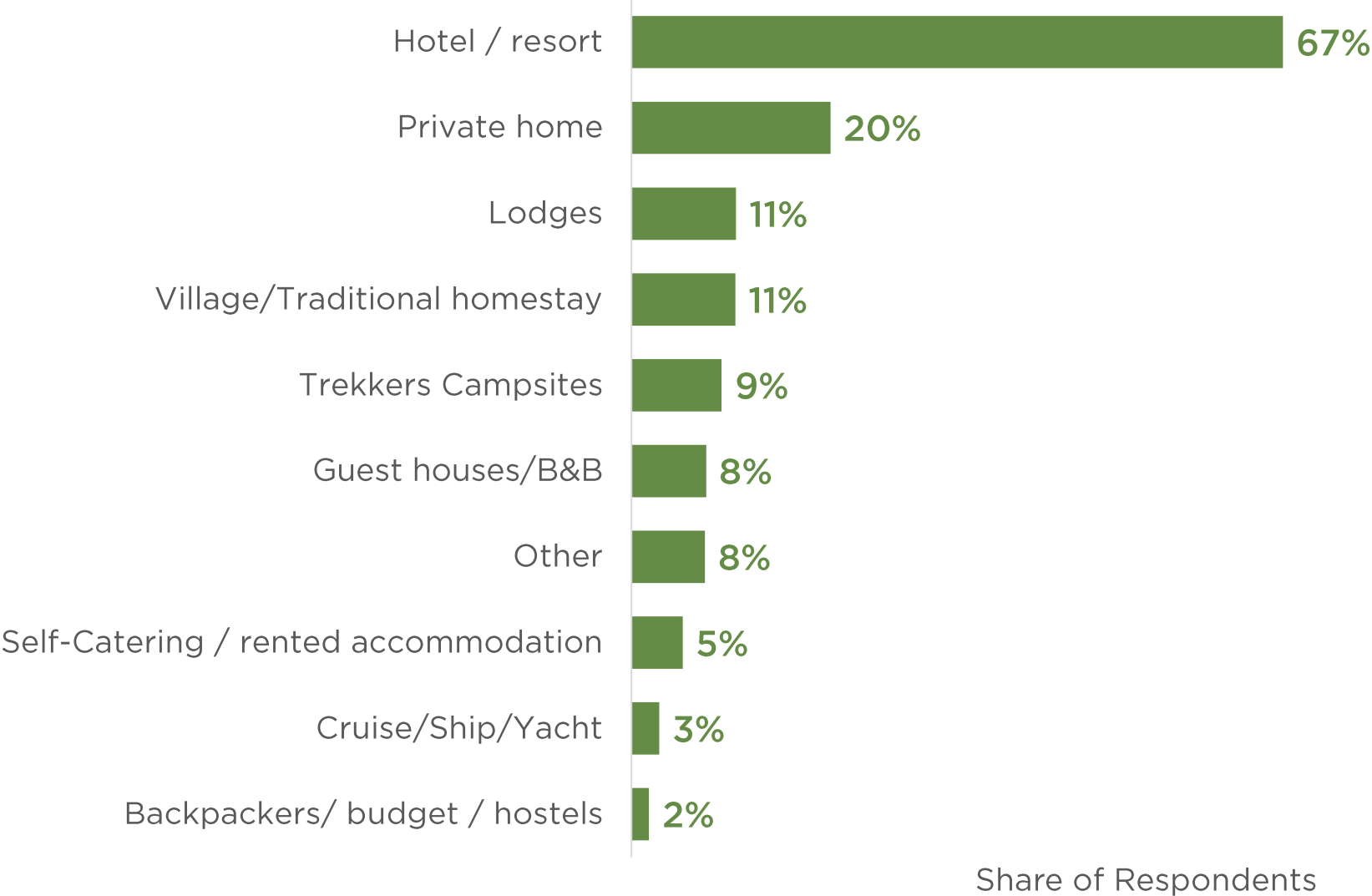
## Other destinations travelled to:



Share of respondent comments

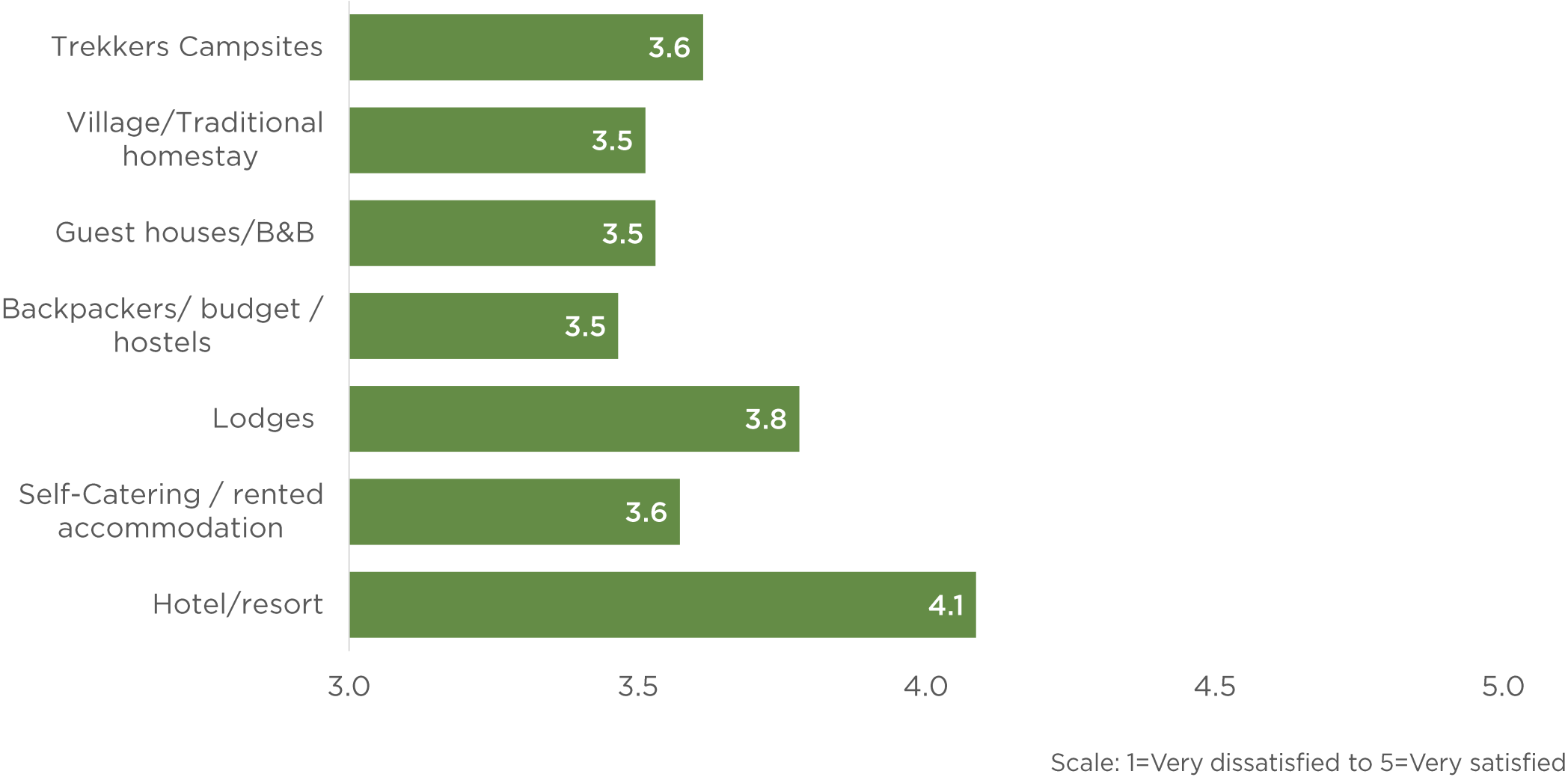
*Note: Multiple responses, therefore total does not add up to 100%*

# Types of Accommodation Stayed - June-Nov 2023



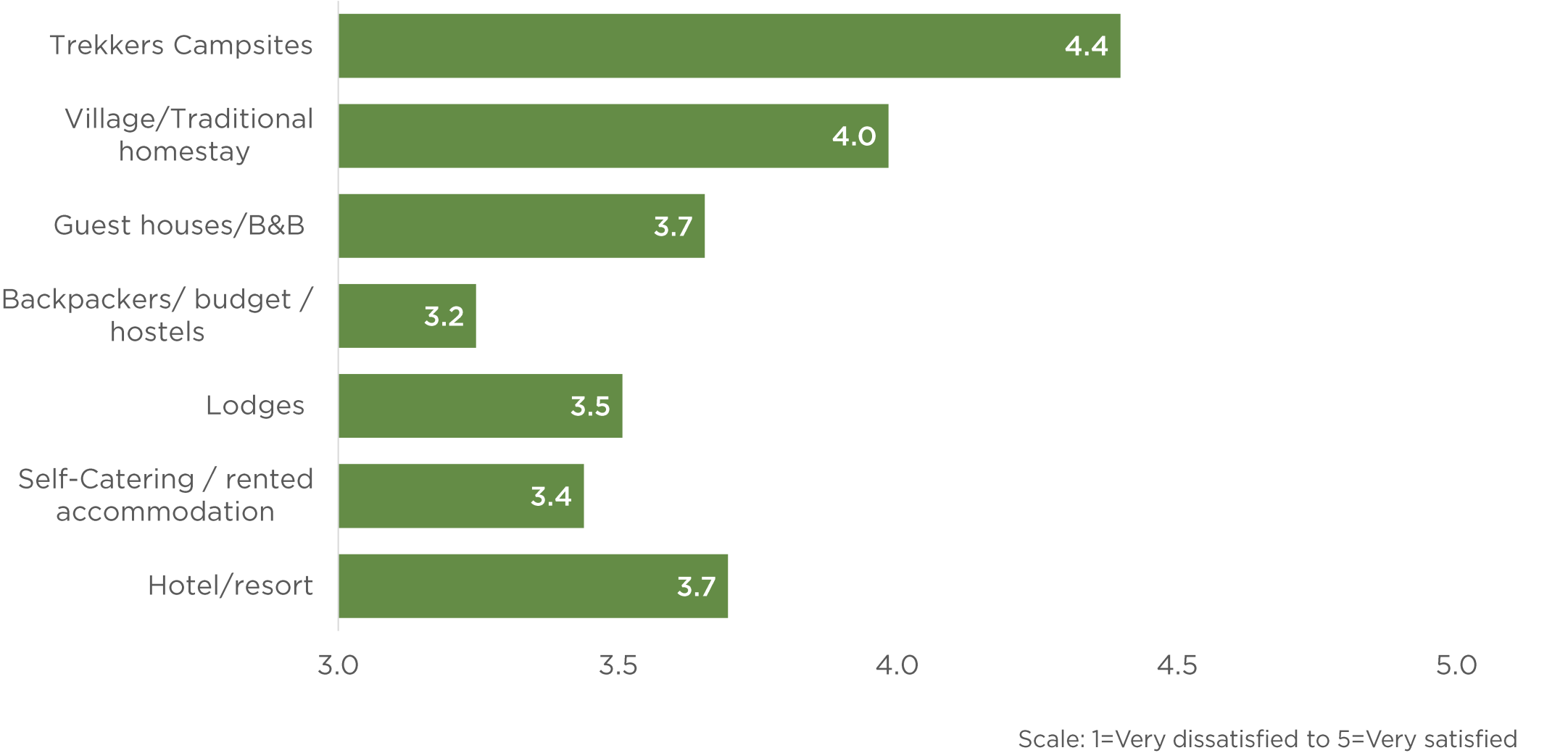
*Note: Multiple responses, therefore total does not add up to 100%*

# Satisfaction with Health and safety measures (cleanliness, sanitizer) in Accommodation Used - June-Nov 2023



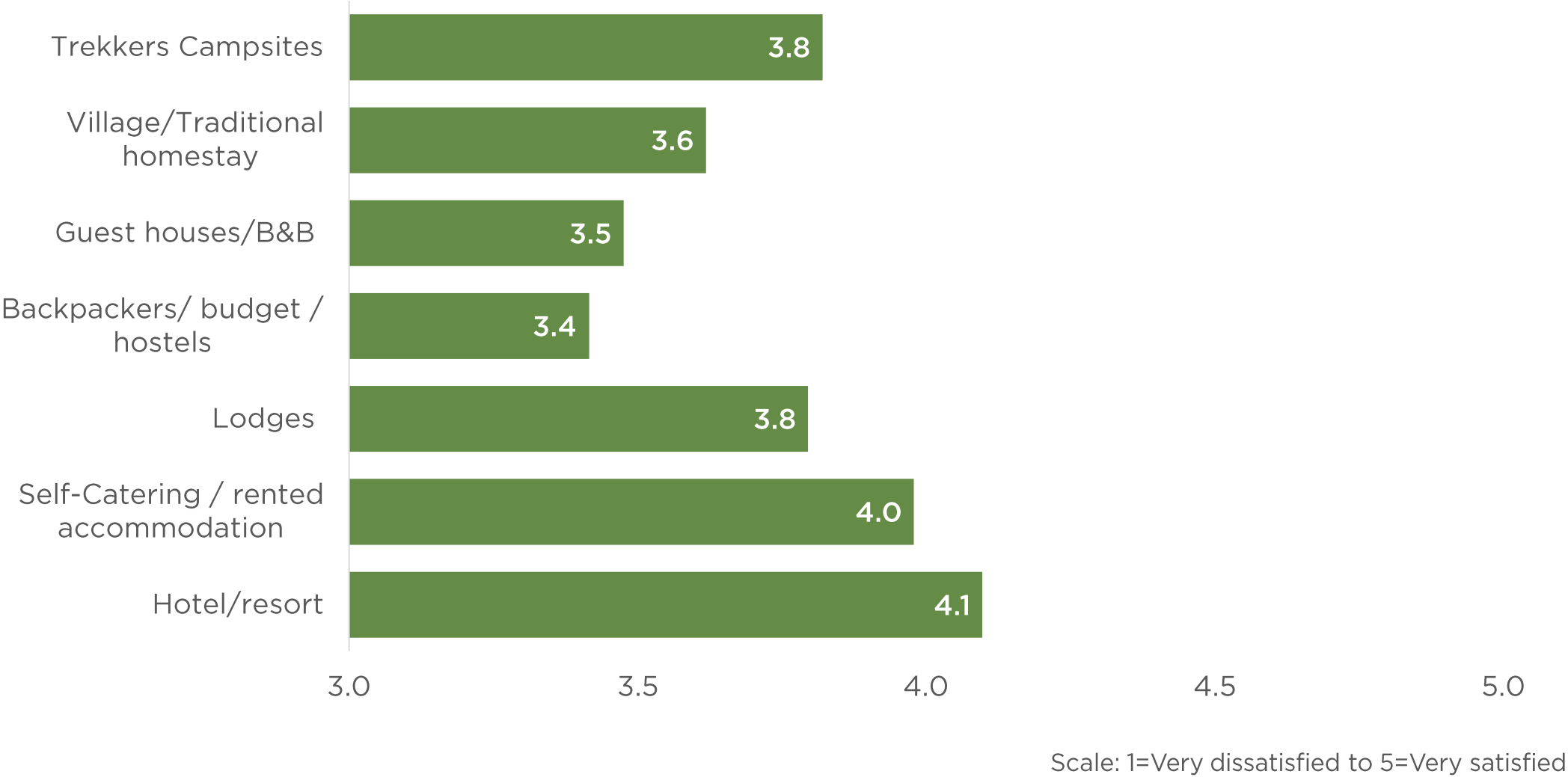
*Note: Multiple responses, therefore total does not add up to 100%*

# Satisfaction with Overall value for money in Accommodation Used - June-Nov 2023



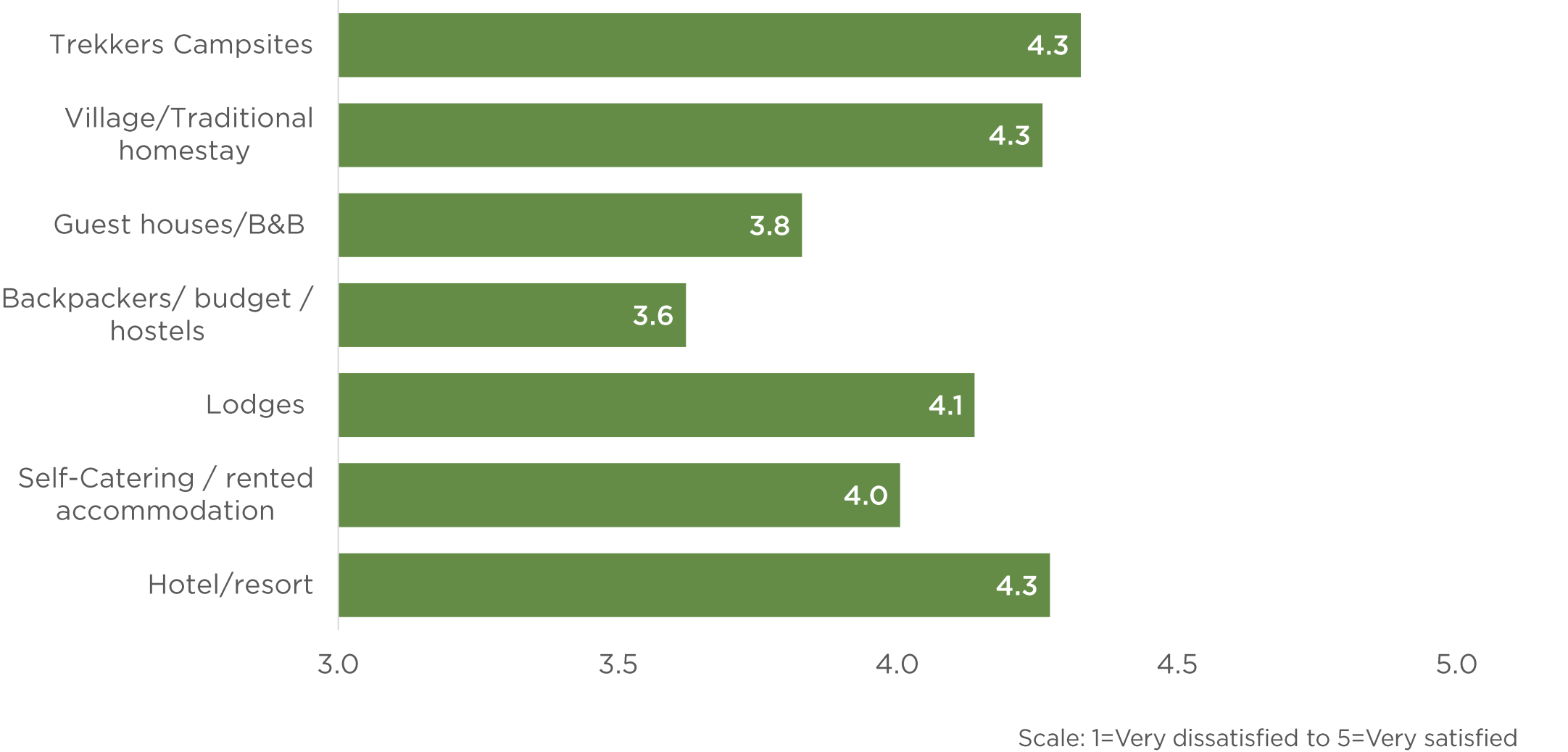
*Note: Multiple responses, therefore total does not add up to 100%*

# Satisfaction with Quality, availability and maintenance of facilities in Accommodation Used - June-Nov 2023



*Note: Multiple responses, therefore total does not add up to 100%*

# Satisfaction with Level of service in Accommodation Used - June-Nov 2023



*Note: Multiple responses, therefore total does not add up to 100%*

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
& Impact

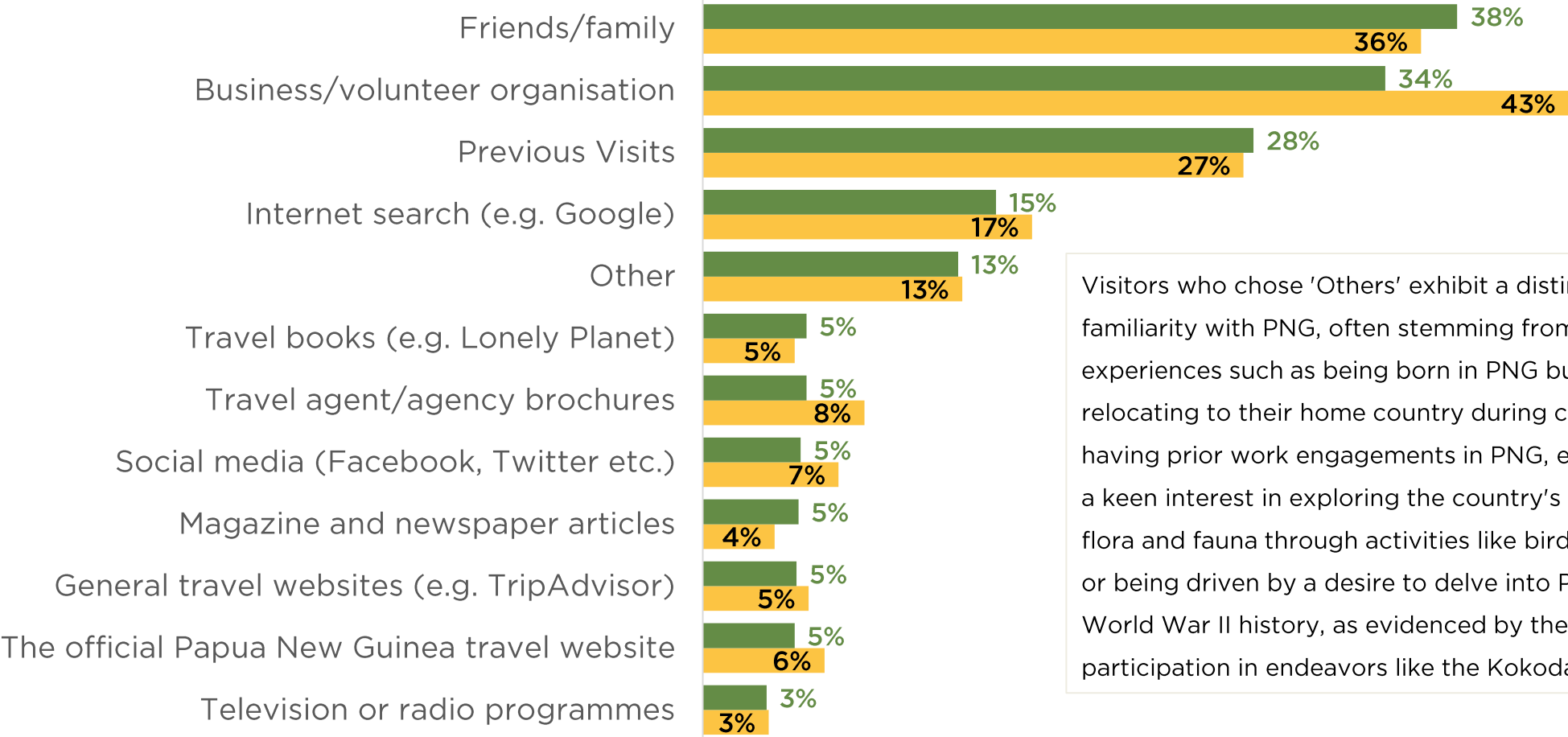


Visitor  
Satisfaction

# Information Source

Q How did you find out about PNG as a destination?

JUN-NOV 22 | JUN-NOV 23



Visitors who chose 'Others' exhibit a distinct familiarity with PNG, often stemming from diverse experiences such as being born in PNG but relocating to their home country during childhood, having prior work engagements in PNG, expressing a keen interest in exploring the country's abundant flora and fauna through activities like birdwatching, or being driven by a desire to delve into PNG's rich World War II history, as evidenced by their participation in endeavors like the Kokoda trek.

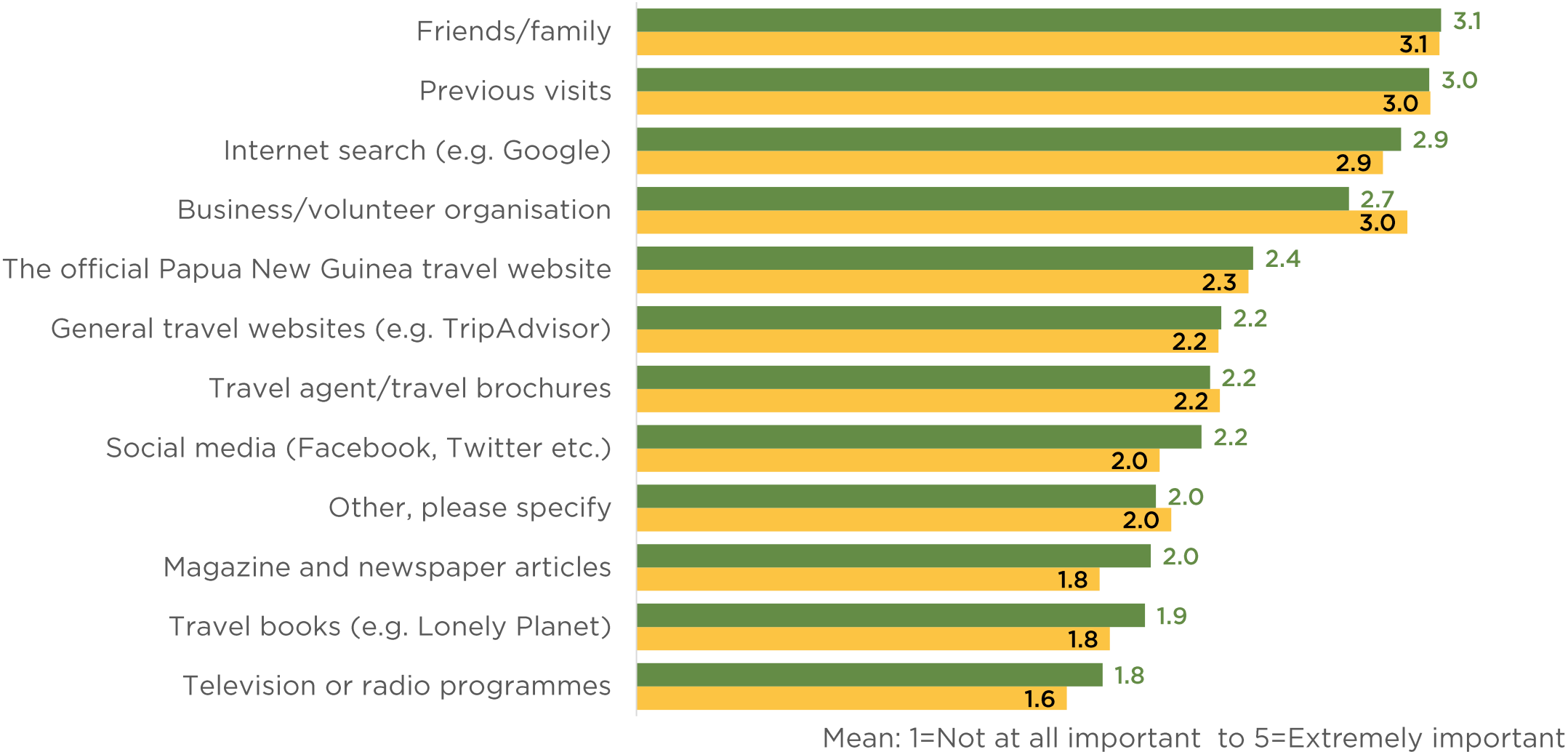
Share of Respondents

Note: Multiple responses, therefore total does not add up to 100%

# Information Source Ranking

**Q** How important were the information source(s) when planning your trip?

JUN-NOV 22 | JUN-NOV 23



*Note: Multiple responses, therefore total does not add up to 100%*

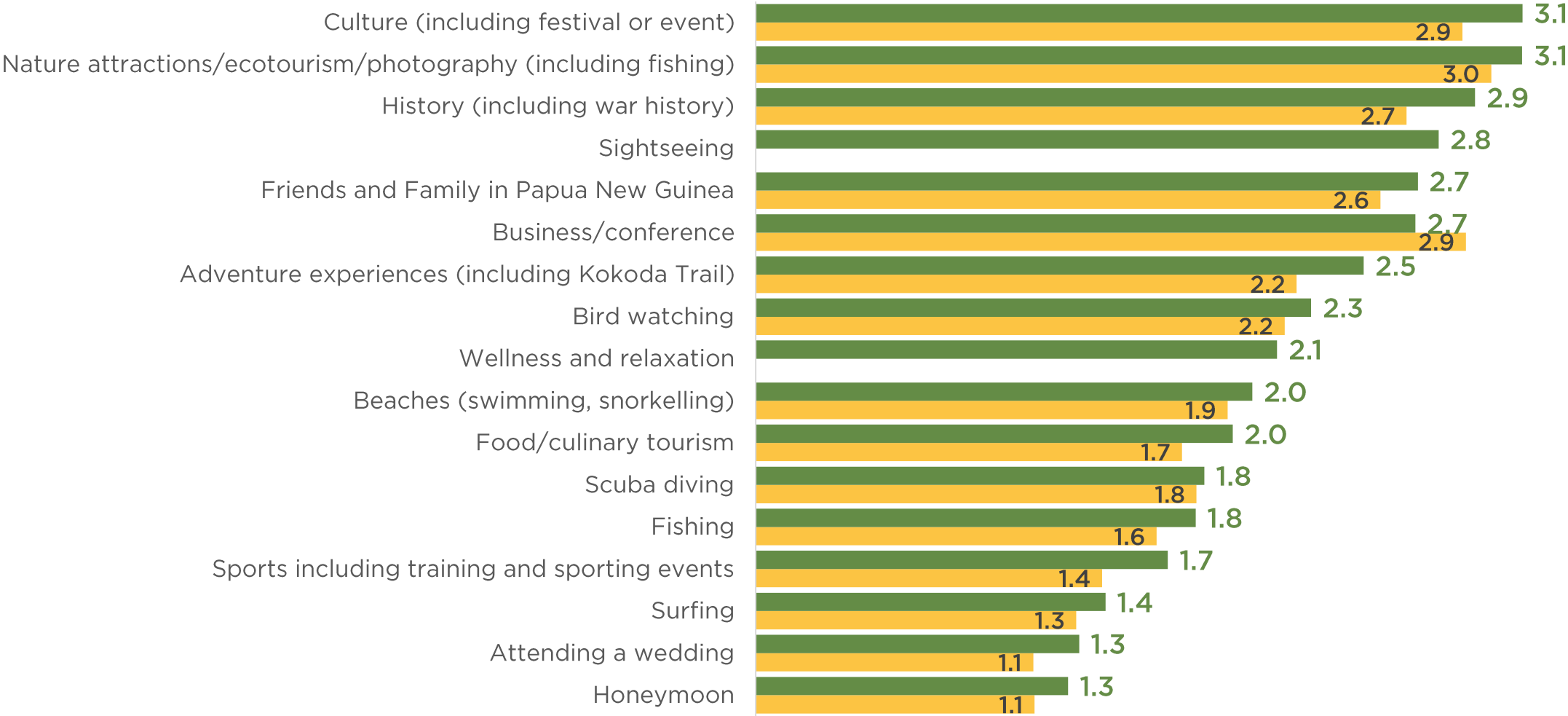
# Influential Factors

Q

Influential factors in travel to PNG

JUN-NOV 22

JUN-NOV 23



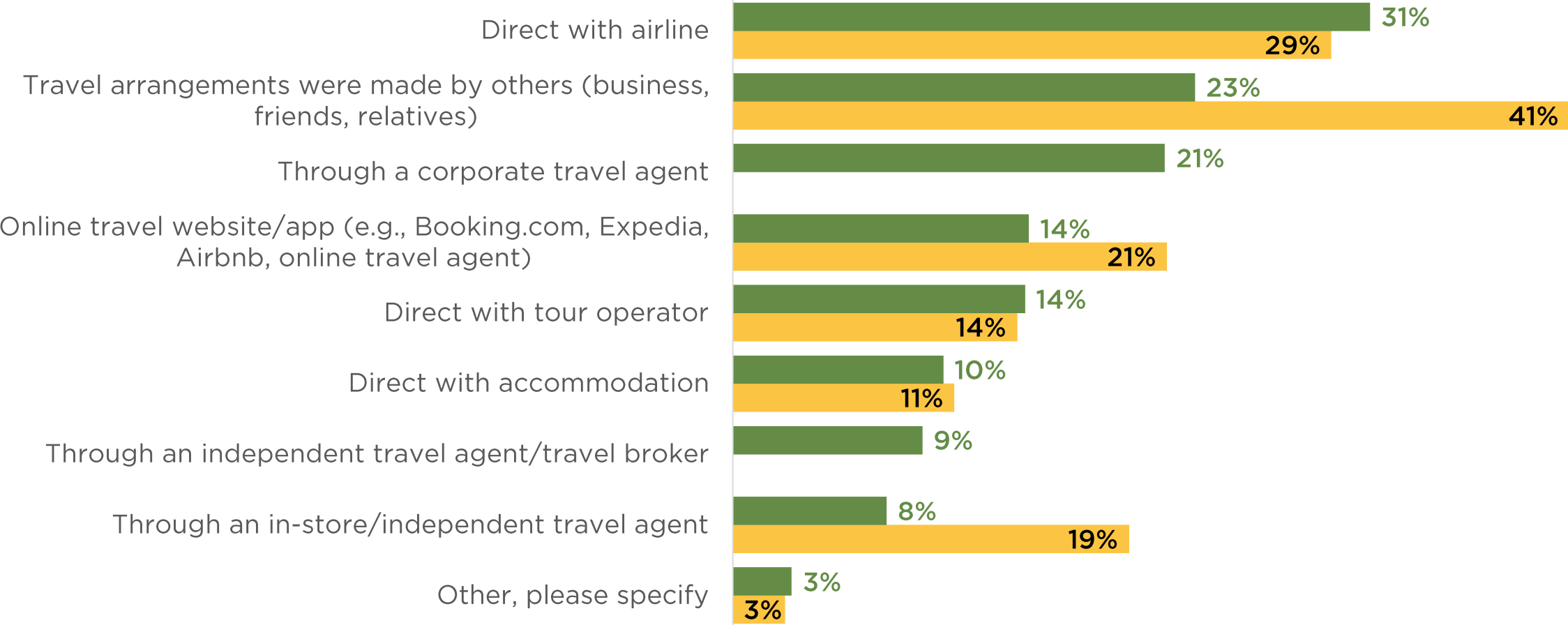
Mean: 1=Not at all important to 5=Extremely important

*Note: Multiple responses, therefore total does not add up to 100%  
Sightseeing and Wellness & Relaxation are new categories in the June to November 2023 period*

# Methods of Travel Purchase

**Q** How did you purchase your travel?

JUN-NOV 22 | JUN-NOV 23



Share of Respondents

Note: Multiple responses, therefore total does not add up to 100%

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
& Impact



Visitor  
Satisfaction

# Prepaid Expenditure Per Person (USD)

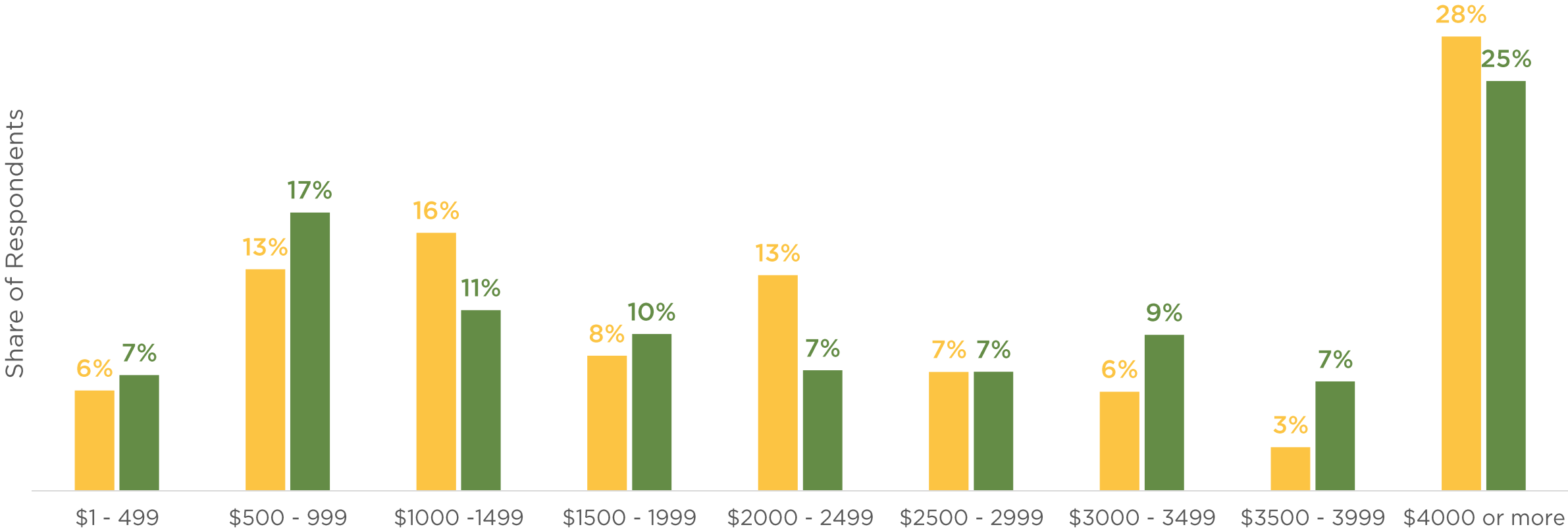
Avg. Prepaid Per Person (USD)

2,728

JUN-NOV 2022

3,138

JUN-NOV 2023



Note: US dollars

# Prepaid Expenditure Per Person (PGK)

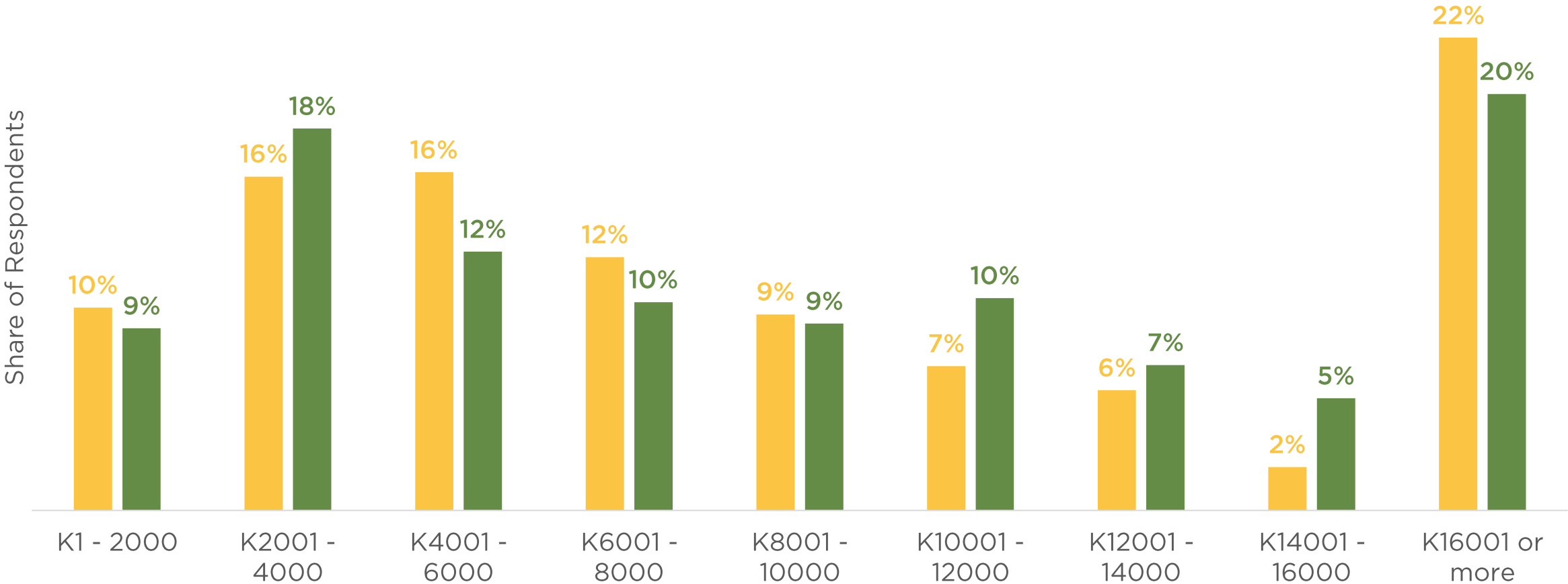
Avg. Prepaid Per Person (PGK)

9,849

JUN-NOV 2022

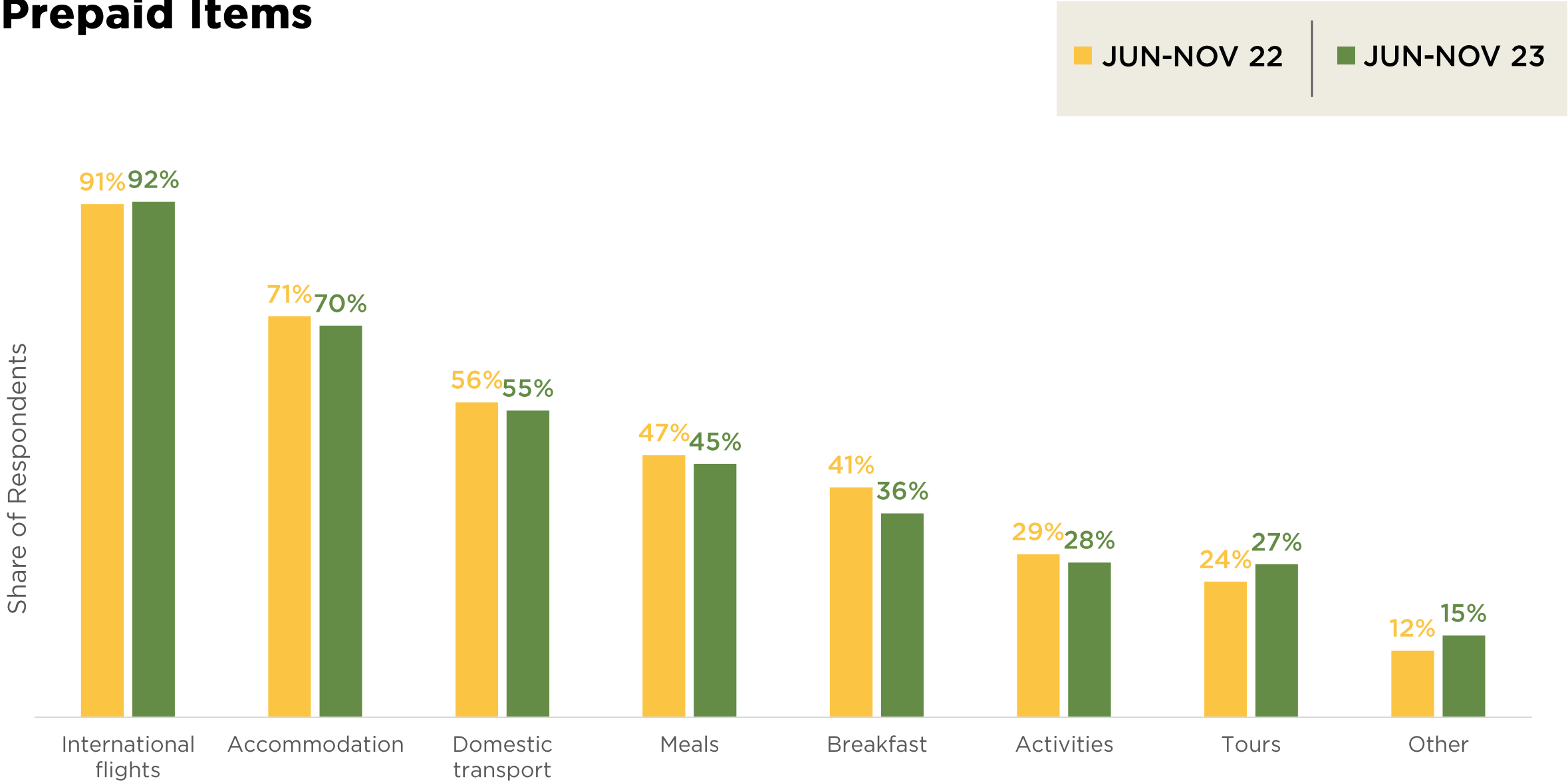
11,015

JUN-NOV 2023



Note: Papua New Guinea Kina

# Prepaid Items



*Note: Multiple responses, therefore total does not add up to 100%*

# Overall | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	37	31	111
Food & Beverage	17	14	51
Domestic Travel	10	9	32
Retail	2	2	6
Souvenir	4	4	13
Tour	9	7	26
Local Transport	7	6	22
Other	13	11	39
Internet & Service	2	1	5
TOTAL	100	84	305

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the from the official PNG Visitor Arrival statistics*

# Overall | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 11.7 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
3,138	11,015
2,040	7,160
174	612
<hr/>	
985	3,566
84	305
<hr/>	
3,025	10,725
259	917

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the from the official PNG Visitor Arrival statistics*

TOTAL ECONOMIC IMPACT

USD 182 MILLION

FROM 60,277 VISITORS (ALL INTERNATIONAL)



PREPAID  
EXPENDITURE

\$3,138

Prepaid per trip



IN-COUNTRY  
SPEND

\$84

In-country spend per day

65%

Flowing into local  
economy rate



X 11.7 nights  
Average length of stay

\$2,040

Prepaid per trip

\$985

In-country spend per trip



TOTAL  
EXPENDITURE

\$3,025 per visitor per trip

\$259 per visitor per day

Note: US dollars



MOST PARTICIPATED ACTIVITIES



52%

Local  
Market



46%

Sightseeing



46%

Visiting  
villages



46%

Local  
produce



SATISFACTION



4/5

Overall, visitors are very satisfied.



87%

Visitors are willing to return.



85%

Visitors are willing to recommend.

Note: In the expenditure analysis of Holiday Visitors do not include those who indicated 'Sports' as their reason for traveling to PNG, as MICE is a separate category in the official PNG visitor arrival statistics. For all other analyses, Holiday is merged with Sports and Ocean Cruising and Adventures.

# Business | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	44	59	215
Food & Beverage	18	25	89
Domestic Travel	9	12	44
Retail	3	4	14
Souvenir	4	5	18
Tour	2	2	8
Local Transport	8	11	39
Other	11	15	54
Internet & Service	2	3	12
TOTAL	100	136	494

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the Business category from the official PNG Visitor Arrival statistics*

# Business | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 11.8 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
2,636	8,936
1,713	5,809
146	494
1,598	5,810
136	494
3,312	11,618
282	988

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the Business category from the official PNG Visitor Arrival statistics*

TOTAL ECONOMIC IMPACT

# USD 53 MILLION

FROM 16,154 VISITORS (BUSINESS)



PREPAID  
EXPENDITURE

**\$2,636**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$136**

In-country spend per day

65%

Flowing into local  
economy rate



X **11.8 nights**  
Average length of stay

**\$1,713**

Prepaid per trip

**\$1,598**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$3,312** per visitor per trip  
**\$282** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



45%  
Local  
Market



46%  
Local  
produce



39%  
Local crafts



41%  
Local arts



## SATISFACTION



**3.6/5**

Overall, visitors are very satisfied.



**90%**

Visitors are willing to return.



**83%**

Visitors are willing to recommend.

Note: In the expenditure analysis, Business Visitors do not include those who indicated 'MICE' as their reason for traveling to PNG, as MICE is a separate category in the official PNG visitor arrival statistics. For all other analyses, Business and MICE are merged..

# M.I.C.E | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	45	96	351
Food & Beverage	22	46	167
Domestic Travel	13	27	95
Retail	2	5	19
Souvenir	3	7	25
Tour	0	0	0
Local Transport	7	15	55
Other	6	13	46
Internet & Service	1	3	10
TOTAL	100	212	769

*Note: 'MICE' stands for Meetings, Incentives, Conferences, and Exhibitions. Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the MICE category from the official PNG Visitor Arrival statistics*

# M.I.C.E | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 6.3 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**

**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
1,780	6,327
1,157	4,113
185	656
1,330	4,821
212	769
2,487	8,934
397	1,425

*Note: 'MICE' stands for Meetings, Incentives, Conferences, and Exhibitions. Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the MICE category from the official PNG Visitor Arrival statistics*

TOTAL ECONOMIC IMPACT

# USD 2 MILLION

FROM 891 VISITORS (M.I.C.E)



PREPAID  
EXPENDITURE

**\$1,780**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$212**

In-country spend per day

65%

Flowing into local  
economy rate



X **6.3 nights**  
Average length of stay

**\$1,157**

Prepaid per trip

**\$1,330**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$2,487** per visitor per trip  
**\$397** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



44%

Local  
produce



44%

Church



46%

Visiting the  
beach



41%

Sightseeing



## SATISFACTION



**4/5**

Overall, visitors are very satisfied.



**95%**

Visitors are willing to return.



**75%**

Visitors are willing to recommend.

Note: "MICE" is a visit-purpose category in PNG arrival cards. The IVS survey includes a 'Conference' category, and any travel for meetings or workshops marked as 'Other' is recoded as 'Conference' to align with the 'MICE' category.

# Employment | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	46	11	39
Food & Beverage	18	4	15
Domestic Travel	19	4	16
Retail	2	0	2
Souvenir	4	1	3
Tour	0	0	0
Local Transport	0	0	0
Other	10	2	8
Internet & Service	1	0	1
<b>TOTAL</b>	<b>100</b>	<b>23</b>	<b>84</b>

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the Employment category from the official PNG Visitor Arrival statistics*

# Employment | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 38.2 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
3,372	11,994
2,192	7,796
57	204
<hr/>	
867	3,197
23	84
<hr/>	
3,059	10,993
80	288

*Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the Employment category from the official PNG Visitor Arrival statistics*

TOTAL ECONOMIC IMPACT

# USD 77 MILLION

FROM 25,182 VISITORS (EMPLOYMENT)



PREPAID  
EXPENDITURE

**\$3,372**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$23**

In-country spend per day

65%

Flowing into local  
economy rate



X **38.2 nights**  
Average length of stay

**\$2,192**

Prepaid per trip

**\$867**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$3,059** per visitor per trip

**\$80** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



56%

Local  
Market



56%

Cultural  
festivals



61%

Visiting the  
beach



50%

Local arts



## SATISFACTION



**4.1/5**

Overall, visitors are very satisfied.



**94%**

Visitors are willing to return.



**94%**

Visitors are willing to recommend.

Note: "Employment" is a visit-purpose category in PNG arrival cards. The IVS survey does not have a specific 'Employment' category. Employment numbers were ascertained from comments found in 'Other' and was recoded as 'Employment' to align with the 'Employment' category reported by PNG Official Statistics.

# Holiday | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	27	24	87
Food & Beverage	13	12	42
Domestic Travel	11	10	35
Retail	1	1	4
Souvenir	5	5	17
Tour	23	20	73
Local Transport	4	3	12
Other	16	14	52
Internet & Service	1	1	2
TOTAL	100	90	324

*Note: Total Economic Impact-Per Trip and Per Day are interpreted as Per-Person expenditure. Multiply Total Economic Impact-Per-Trip by the actual number of visitor arrivals during the period to obtain the estimated total economic impact for the period*

# Holiday | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 11.5 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
3,328	11,827
2,163	7,687
189	670
1,034	3,718
90	324
3,197	11,405
279	994

*Note: Total Economic Impact-Per Trip and Per Day are interpreted as Per-Person expenditure. Multiply Total Economic Impact-Per-Trip by the actual number of visitor arrivals during the period to obtain the estimated total economic impact for the period*

TOTAL ECONOMIC IMPACT

# USD 29 MILLION

FROM 9,280 VISITORS (HOLIDAY)



PREPAID  
EXPENDITURE

**\$3,328**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$90**

In-country spend per day

65%

Flowing into local  
economy rate



X **11.5 nights**  
Average length of stay

**\$2,163**

Prepaid per trip

**\$1,034**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$3,197** per visitor per trip

**\$279** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



56%

Local  
Market



58%

Sightseeing



62%

Visiting  
villages



50%

Hiking



## SATISFACTION



**4.2/5**

Overall, visitors are very satisfied.



**75%**

Visitors are willing to return.



**88%**

Visitors are willing to recommend.

Note: In the expenditure analysis, Holiday Visitors do not include those who indicated 'Sports' as their reason for traveling to PNG, as Sport is a separate category in the official PNG visitor arrival statistics. For all other analyses, Holiday and Sports are merged..

# Sports | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	53	53	187
Food & Beverage	19	19	69
Domestic Travel	6	6	21
Retail	0.4	0.4	1
Souvenir	7	7	24
Tour	9	9	33
Local Transport	2	2	8
Other	3	3	11
Internet & Service	0.3	0.3	1
TOTAL	100	100	354

*Note: Total Economic Impact-Per Trip and Per Day are interpreted as Per-Person expenditure. Multiply Total Economic Impact-Per-Trip by the actual number of visitor arrivals during the period to obtain the estimated total economic impact for the period*

# Sports | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 12 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**

**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
3,329	11,820

2,164	7,683
180	640

1,197	4,256
100	354

<b>3,360</b>	<b>11,938</b>
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<b>280</b>	<b>994</b>
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*Note: Total Economic Impact-Per Trip and Per Day are interpreted as Per-Person expenditure. Multiply Total Economic Impact-Per-Trip by the actual number of visitor arrivals during the period to obtain the estimated total economic impact for the period*

TOTAL ECONOMIC IMPACT

# USD 3 MILLION

FROM 959 VISITORS (SPORTS)



PREPAID  
EXPENDITURE

**\$3,329**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$100**

In-country spend per day

**65%**

Flowing into local  
economy rate



**X 12 nights**  
Average length of stay

**\$2,164**

Prepaid per trip

**\$1,197**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$3,360** per visitor per trip

**\$280** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



**29%**  
Local  
Market



**36%**  
Diving



**32%**  
Visiting  
villages



**48%**  
Sports



## SATISFACTION



**4.2/5**

Overall, visitors are very satisfied.



**75%**

Visitors are willing to return.



**87%**

Visitors are willing to recommend.

Note: In the expenditure analysis, Holiday Visitors do not include those who indicated 'Sports' as their reason for traveling to PNG, as Sport is a separate category in the official PNG visitor arrival statistics. For all other analyses, Holiday and Sports are merged..

# VFR | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	25	9	31
Food & Beverage	19	6	24
Domestic Travel	14	5	18
Retail	2	1	3
Souvenir	4	2	6
Tour	6	2	7
Local Transport	12	4	15
Other	15	5	19
Internet & Service	2	1	3
<b>TOTAL</b>	<b>100</b>	<b>34</b>	<b>125</b>

*Note: 'VFR' stands for Visiting Friends and Relatives. Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the VFR category from the official PNG Visitor Arrival statistics*

# VFR | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 13.1 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
1,417	5,081
921	3,302
70	252
451	1,638
34	125
1,372	4,940
105	377

*Note: 'VFR' stands for Visiting Friends and Relatives. Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the VFR category from the official PNG Visitor Arrival statistics*

TOTAL ECONOMIC IMPACT

# USD 6 MILLION

FROM 4,253 VISITORS (VFR)



PREPAID  
EXPENDITURE

**\$1,417**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$34**

In-country spend per day

**65%**

Flowing into local  
economy rate



X **13.1 nights**  
Average length of stay

**\$921**

Prepaid per trip

**\$451**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$1,372** per visitor per trip  
**\$105** per visitor per day

Note: US dollars



MOST PARTICIPATED ACTIVITIES



**69%**  
Local  
Market



**56%**  
Sightseeing



**53%**  
Local crafts



**64%**  
Local  
produce



SATISFACTION



**4.1/5**

Overall, visitors are very satisfied.



**92%**

Visitors are willing to return.



**87%**

Visitors are willing to recommend.

Note: 'VFR' stands for Visiting Friends and Relatives. Total Economic Impact-Per Trip and Per Day are per-person expenditures. To estimate the total economic impact, multiply Total Economic Impact-Per-Trip by the number of visitor arrivals in the VFR category from the official PNG Visitor Arrival statistics

# Education | In-country Spend Per Person Per Day While in PNG

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	49	52	184
Food & Beverage	15	16	55
Domestic Travel	8	8	30
Retail	0.4	0.4	1
Souvenir	4	4	16
Tour	17	17	62
Local Transport	4	4	15
Other	1	1	4
Internet & Service	1	2	6
<b>TOTAL</b>	<b>100</b>	<b>104</b>	<b>374</b>

*Note: "Education" is a visit-purpose category in PNG arrival cards. The IVS survey has a specific 'Education' category. For IVS analysis purposes, Education has been merged with Special events – cultural which is another purpose-of-visit category in the IVS survey instrument to capture those respondents who travel to PNG to learn about PNG's diverse culture.*

# Education | Economic Impact - Per Person and Total

## Average Spend Prior to arrival

Per Person Per Trip  
*Flowing into local economy rate – estimated 65%*

Per Person Per Trip  
Per Person per Day

## Average Local Spend

*Length of Study (nights) - mean 14.1 nights*

Per Person Per Trip  
Per Person per Day

**Total Economic Impact-Per Trip**  
**Total Economic Impact-Per Day**

## Visitor Expenditure Per Person & Total

USD	PGK
2,612	9,273
1,698	6,028
121	428
<hr/>	
1,470	5,258
104	374
<hr/>	
<b>3,168</b>	<b>11,286</b>
<b>225</b>	<b>802</b>

*Note: Total Economic Impact-Per Trip and Per Day are interpreted as Per-Person expenditure. Multiply Total Economic Impact-Per-Trip by the actual number of visitor arrivals during the period to obtain the estimated total economic impact for the period*

TOTAL ECONOMIC IMPACT

# USD 3 MILLION

FROM 839 VISITORS (EDUCATION)



PREPAID  
EXPENDITURE

**\$2,612**

Prepaid per trip



IN-COUNTRY  
SPEND

**\$104**

In-country spend per day

65%

Flowing into local  
economy rate



X **14.1 nights**  
Average length of stay

**\$1,698**

Prepaid per trip

**\$1,470**

In-country spend per trip



TOTAL  
EXPENDITURE

**\$3,168** per visitor per trip

**\$225** per visitor per day

Note: US dollars



## MOST PARTICIPATED ACTIVITIES



70%  
Local  
market



70%  
Cultural  
festivals



74%  
Visiting  
villages



70%  
Local  
events



## SATISFACTION



**4.3/5**

Overall, visitors are very satisfied.



**80%**

Visitors are willing to return.



**89%**

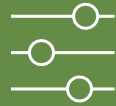
Visitors are willing to recommend.

Note: "Education" is a visit-purpose category in PNG arrival cards. The IVS survey has a specific 'Education' category. For IVS analysis purposes, Education has been merged with Special events – cultural which is another purpose-of-visit category in the IVS survey instrument to capture those respondents who travel to PNG to learn about PNG's diverse culture.

# Report Structure



Visitor Profile



Visitor  
Characteristics  
& Preferences



Information &  
Decision Making



Visitor Spending  
& Impact



Visitor  
Satisfaction

# Visitor Overall Satisfaction

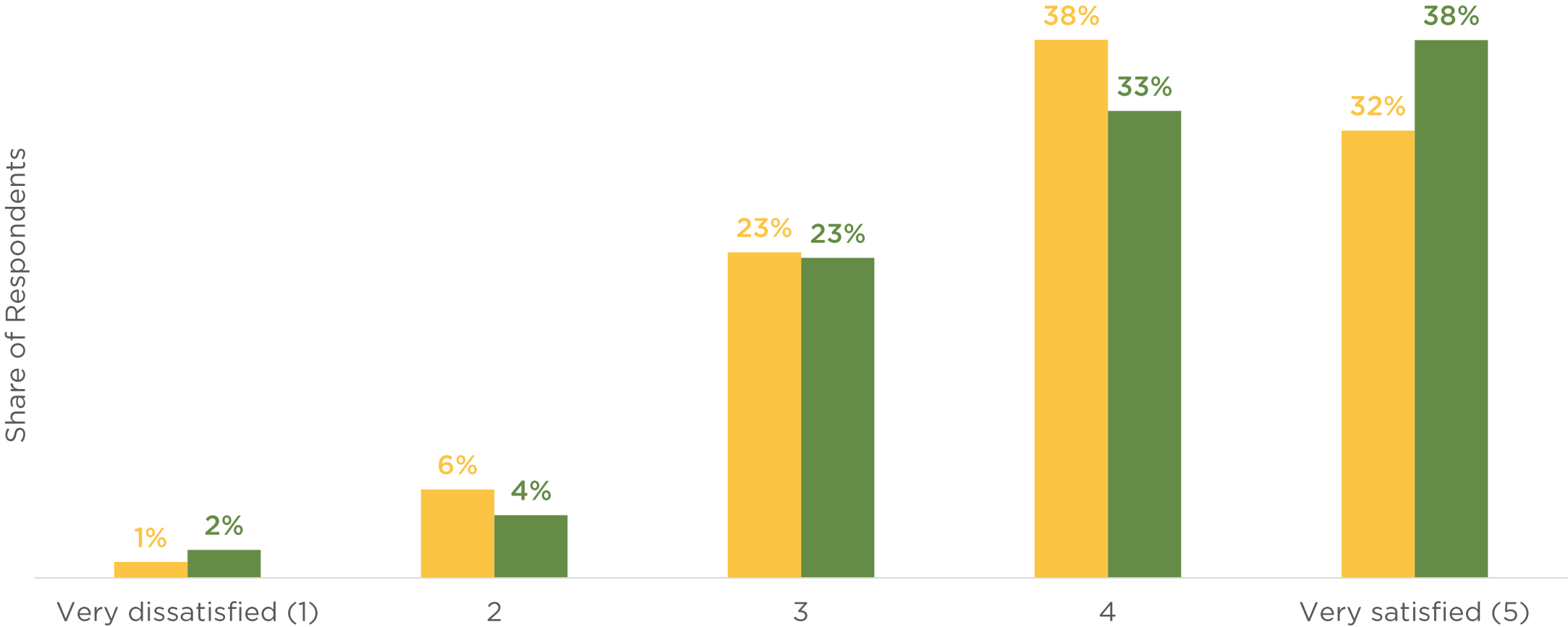
Avg. Overall Satisfaction

3.93

JUN-NOV 2022

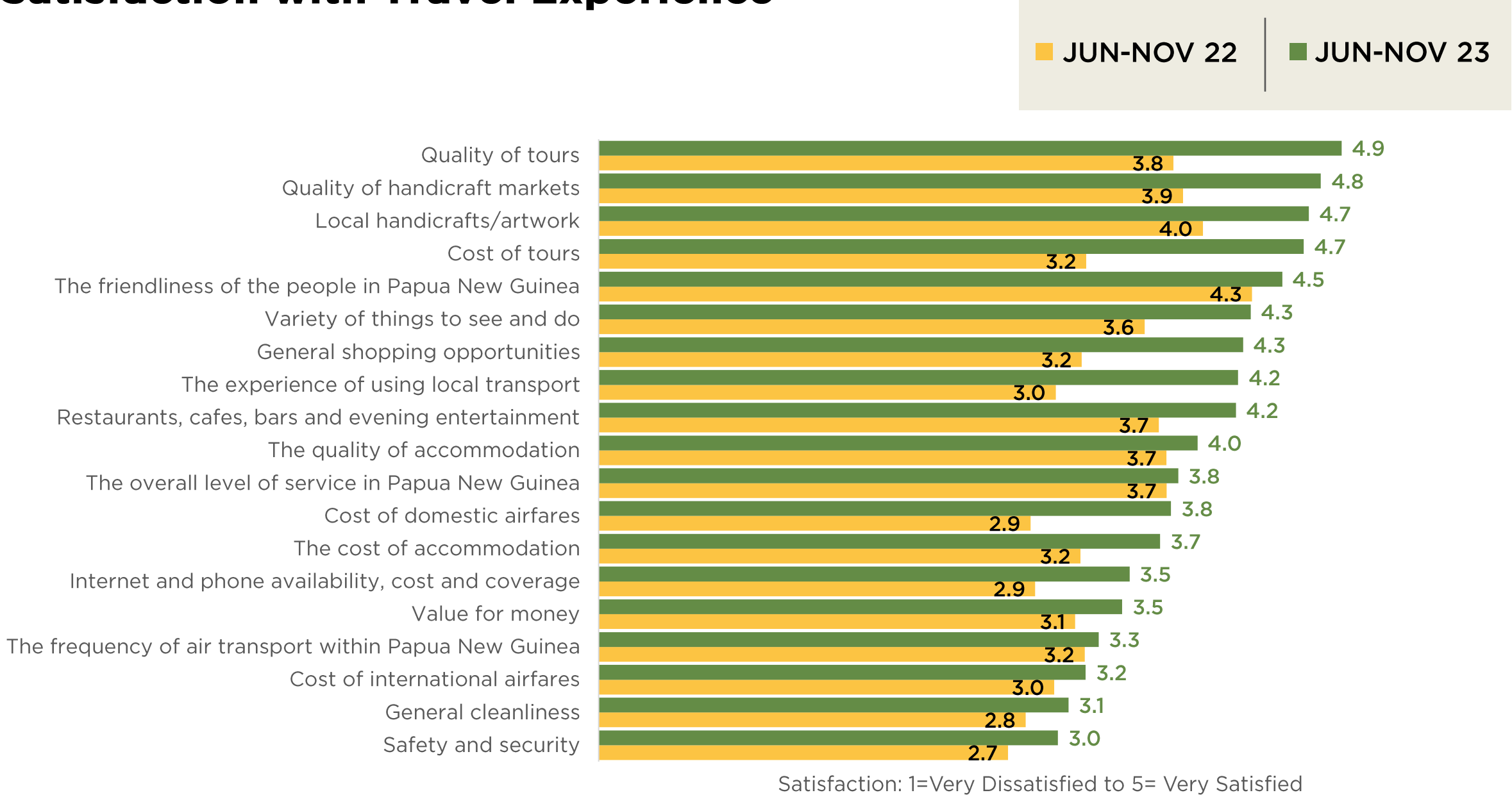
4.01

JUN-NOV 2023



*Note: Due to rounding, total does not sum to 100%*

# Satisfaction with Travel Experience



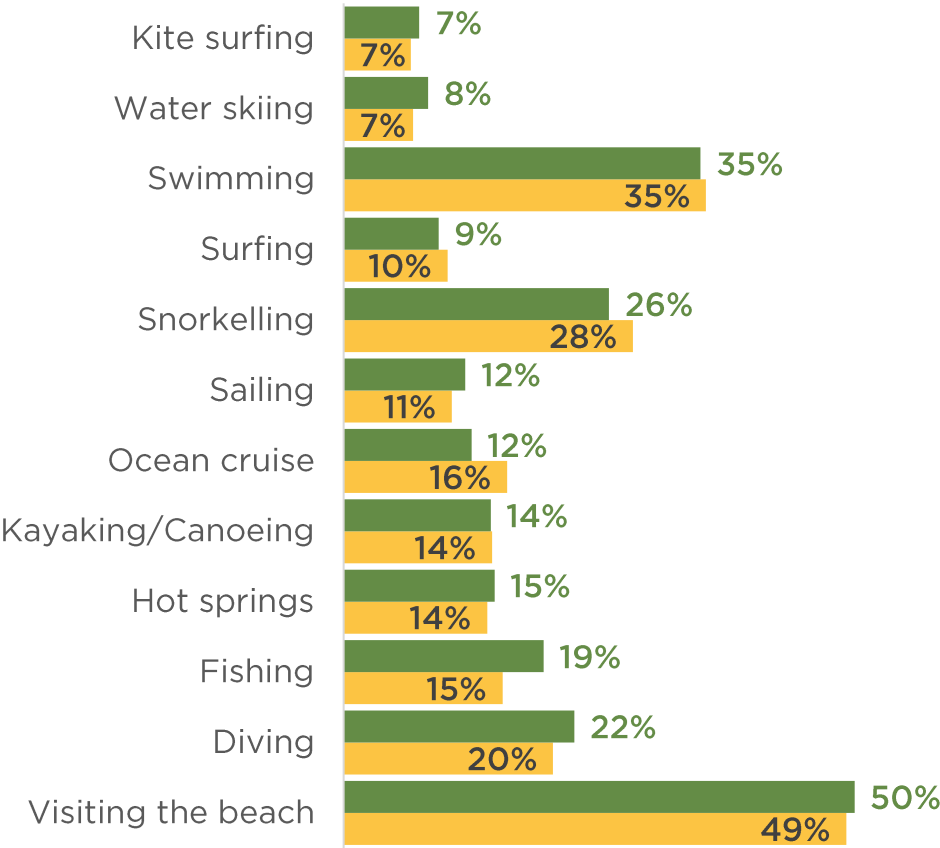
Note: Multiple responses, so total does not add up to 100%

# Water-based Activities

JUN-NOV 22

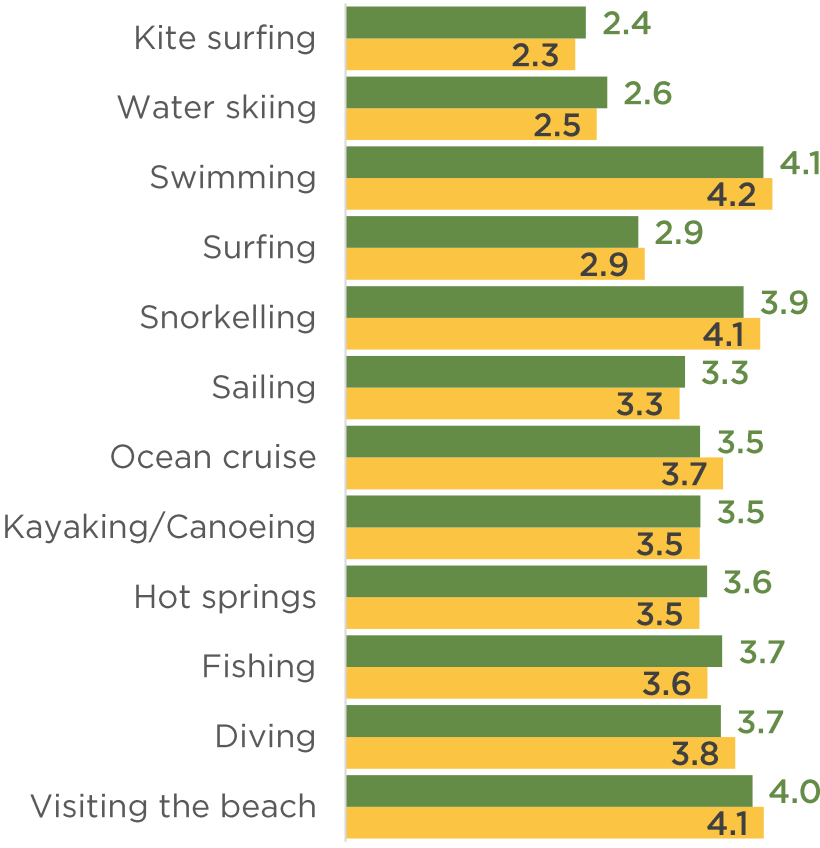
JUN-NOV 23

## Participation Rate



Share of Visitors (%)

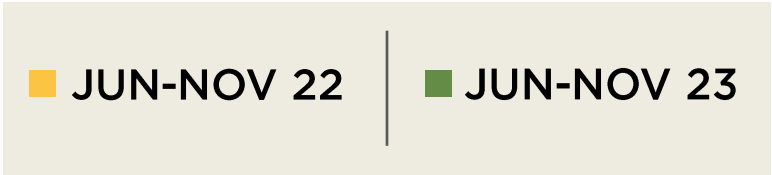
## Satisfaction



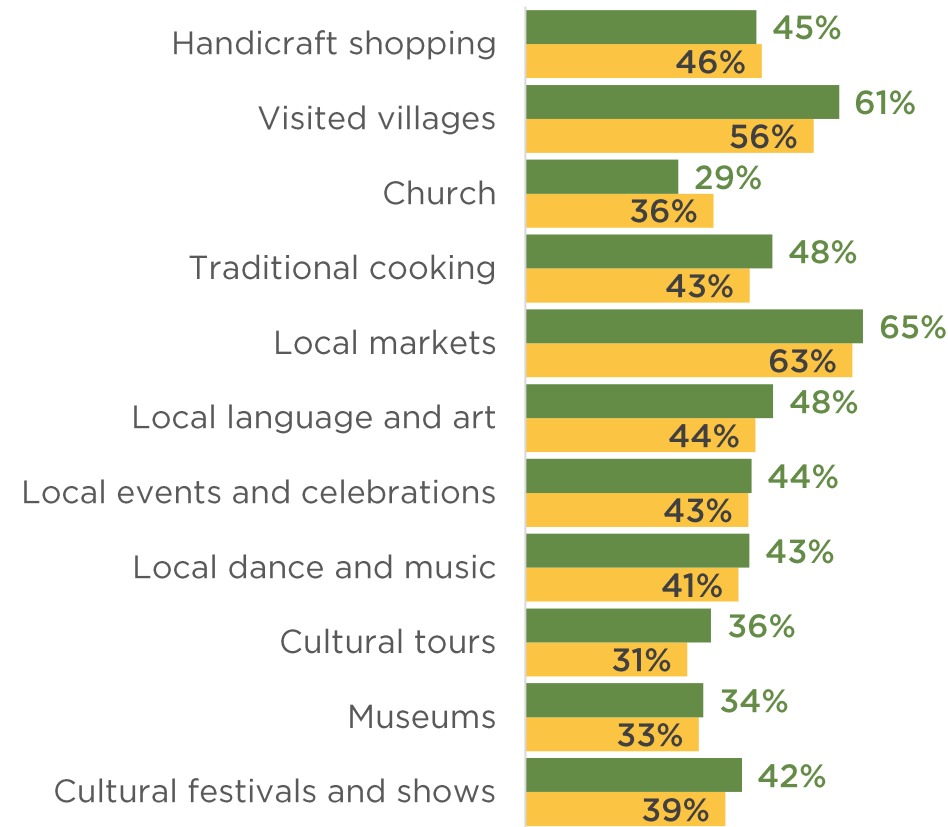
Satisfaction: 1=Very dissatisfied to 5=Very Satisfied

Note: Multiple responses, so total does not add up to 100%

# Cultural-Interaction

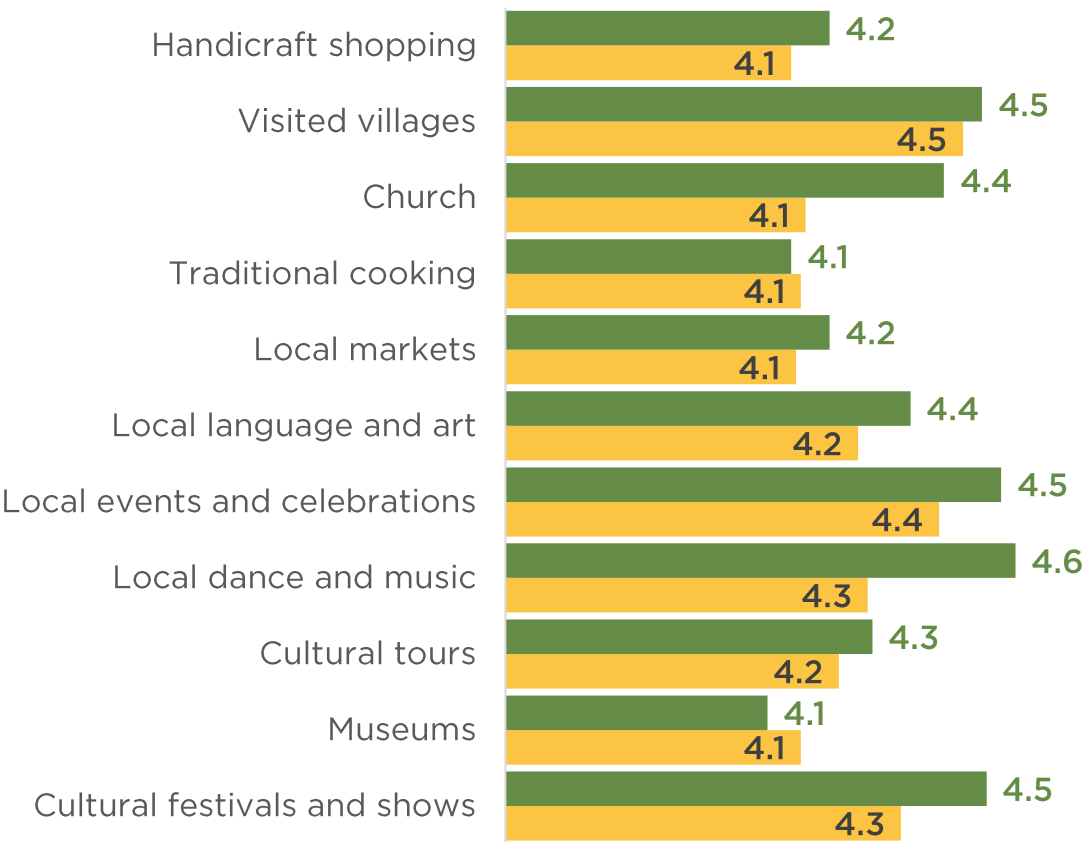


Participation Rate



Share of Visitors (%)

Satisfaction



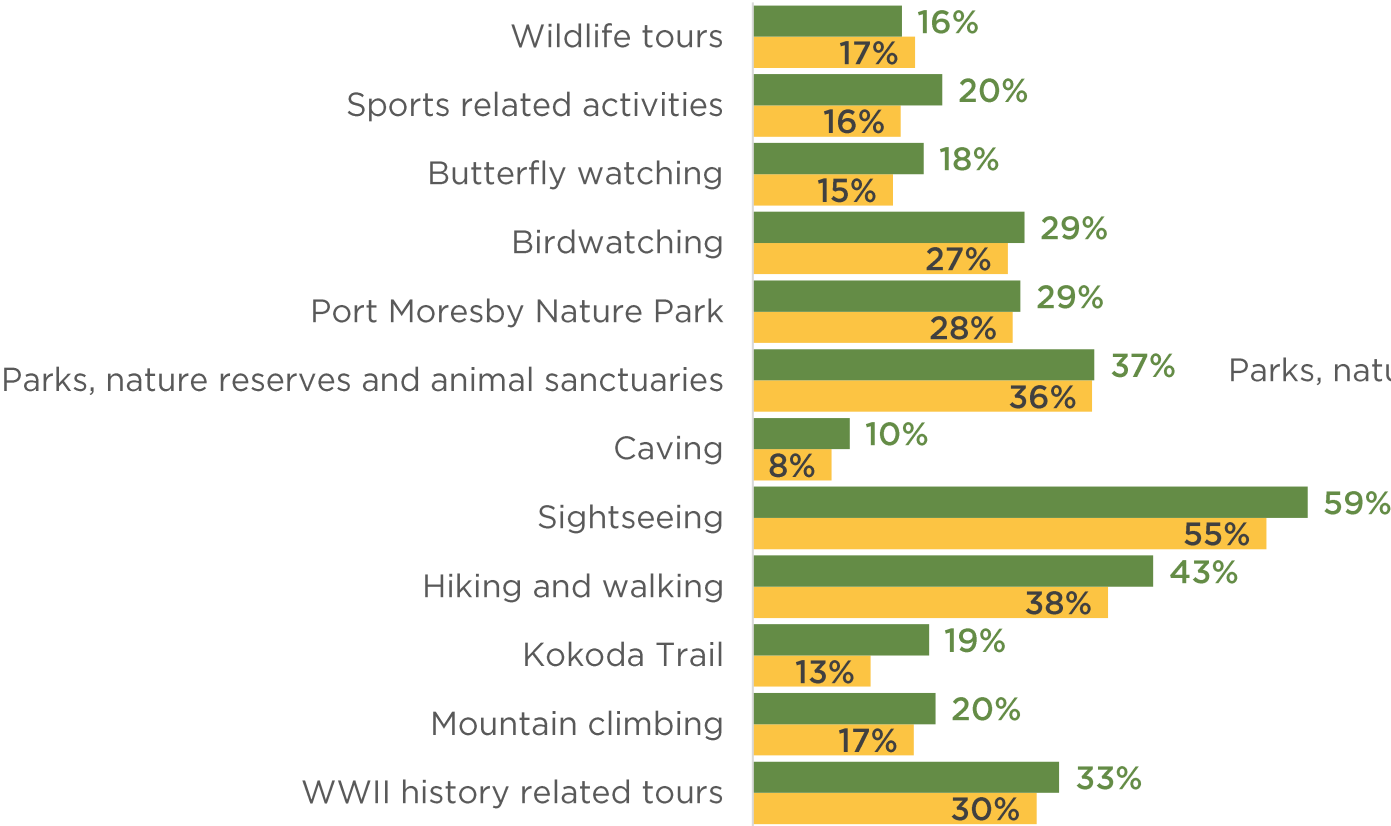
Satisfaction: 1=Very dissatisfied to 5=Very Satisfied

Note: Multiple responses, so total does not add up to 100%

# Land-based Activities

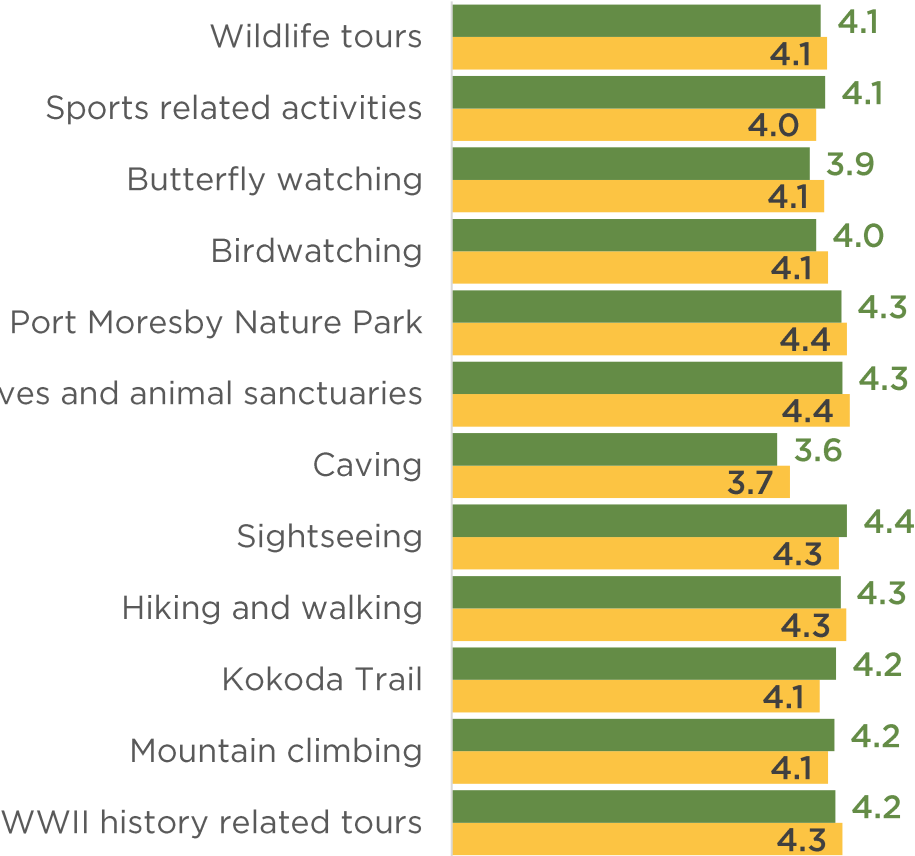
JUN-NOV 22 | JUN-NOV 23

## Participation Rate



Share of Visitors (%)

## Satisfaction

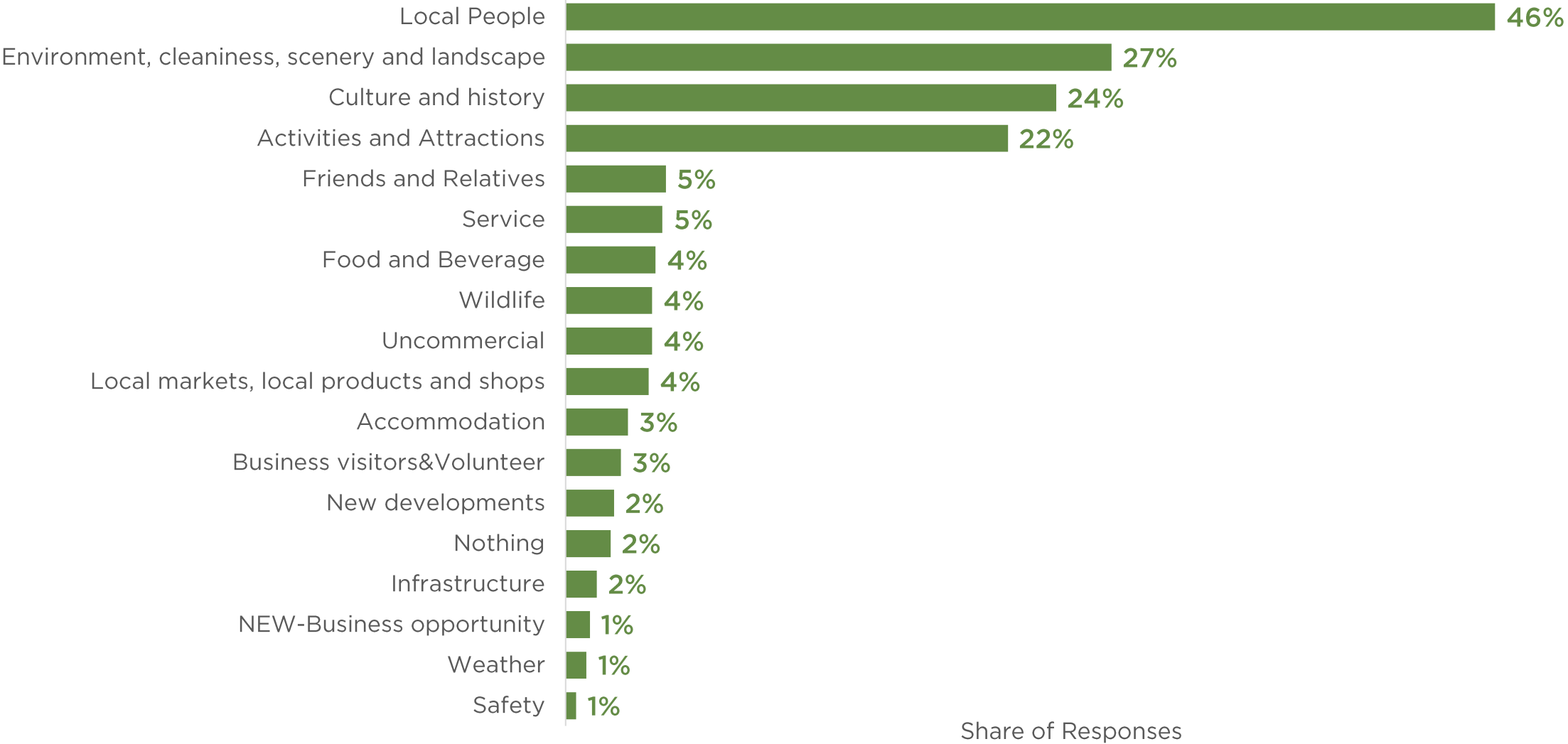


Satisfaction: 1=Very dissatisfied to 5=Very Satisfied

Note: Multiple responses, so total does not add up to 100%

# Most appealing aspects of PNG - June-Nov 2023

Q What did you find most appealing about PNG?



Note: Total response N=585. Multiple response analysis, so total does not add up to 100%

# Quotes for most appealing aspects of PNG



# Most Appealing – Local People



- + The people who travelled with us on the track were incredible.
- + Friendliness of people.
- + Definitely the people, real genuine and very hardworking.
- + My time in PNG was limited but the people I met and interacted with both within my organisation and out and about were friendly and helpful.
- + The people, visiting villages and cultural experiences.
- + The PNG people, the friendliness, and starting to see some investment in infrastructure, restaurant areas, etc.
- + The love from the people, and their kindness.
- + Awesome work opportunity working with an amazing team of local botanists. PNG is a challenging adventure which I can undertake in relative safety as I am supported in a safe work environment.

# Most Appealing – Environment, cleanliness, scenery and landscape

- + Nature (air, mountains, forests, streams, rivers etc.) largely preserved. People are generally nice and friendly.
- + Cleanliness of most of the streets and shopping area visited. Variety of shopping malls.
- + It's people and the beautiful outer islands.
- + Great beaches and weather. Loved the gardens and villages
- + The Kokoda Trek, the locals, and the landscapes hiking along the track.
- + I liked the natural features of the ocean and land. I liked the people.
- + Organic.
- + People, beaches and oceans. Traditions & Culture.

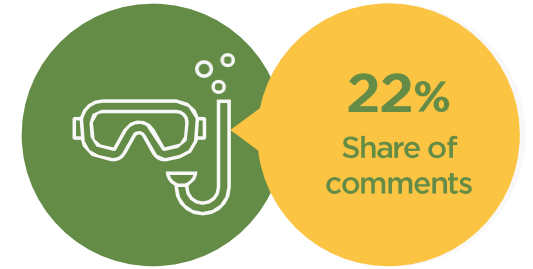


# Most Appealing – Culture and history



- + The people in the highland villages were so incredibly warm and welcoming..
- + It was a joy to walk the hills and see their homes and gardens. Absolutely delightful people.
- + The culture and prospects for a major tourism destination and development of tourism throughout the regions especially Port Moresby and areas like Rabaul, and the mountain regions.
- + I spent all my time in Lae; it was like “coming home”. Apart from some improvement in some infrastructure (roads, hospital, commercial buildings) not a lot had changed. Very nostalgic.
- + Learning about the cultures was the most attractive. i wish I would have had more opportunities.
- + Visiting villages and seeing cultural activities and the people’s hospitality within the village was phenomenal and breathtaking.
- + War History, the villages were beautiful and had very friendly and helpful people.
- + Culture. Goroka Show, Sepik River villages. The people were extremely friendly and felt very safe.

# Most Appealing – Activities and attractions

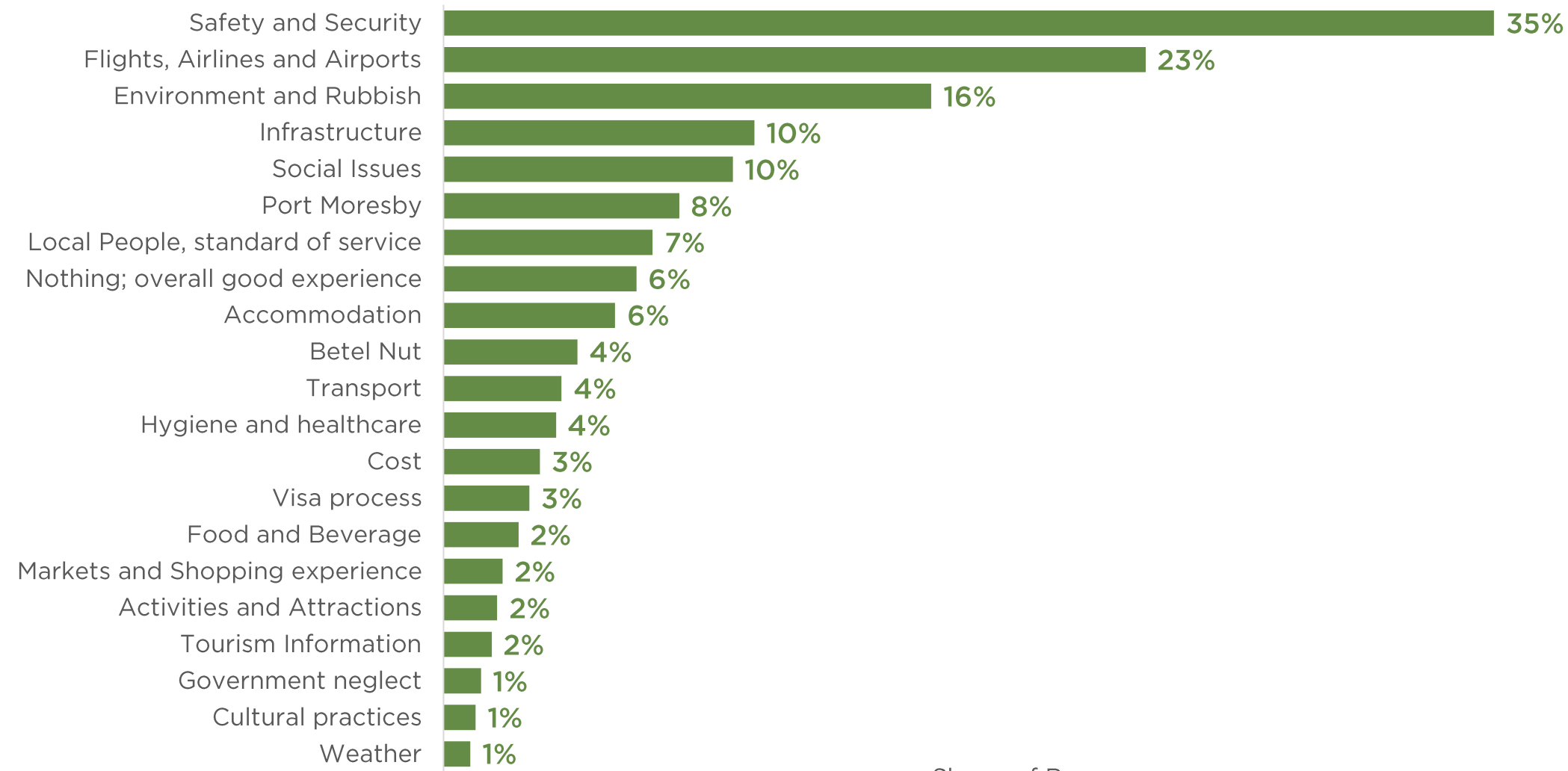


- + Swimming at Ela Beach.
- + The Parliament House and the people. I've always envied the Parliament House and it was in my bucket list to must visit or take a picture with the Parliament House. And when we went that day, we were even given a special tour inside. I will never forget this experience.
- + Walindi Resort was excellent, great staff, exceptional diving, lots of activity options. Friendly province and quite clean and good roads.
- + The actual fishing experience was amazing and the tour operator Baia sports fishing couldn't do it any better they were fantastic.
- + The Kokoda Trek, the locals, and the landscapes hiking along the track.
- + We enjoyed the Adventure Park in Port Moresby - birds, animals and plants. Villages on the Sepik.
- + The Cook Islands Rugby League teams (men and women) visited the Ruatoka Memorial site in Hanuabada. That was perhaps the most memorable experience I have had in my life. It was very special

.

# Least appealing aspects of PNG - June-Nov 2023

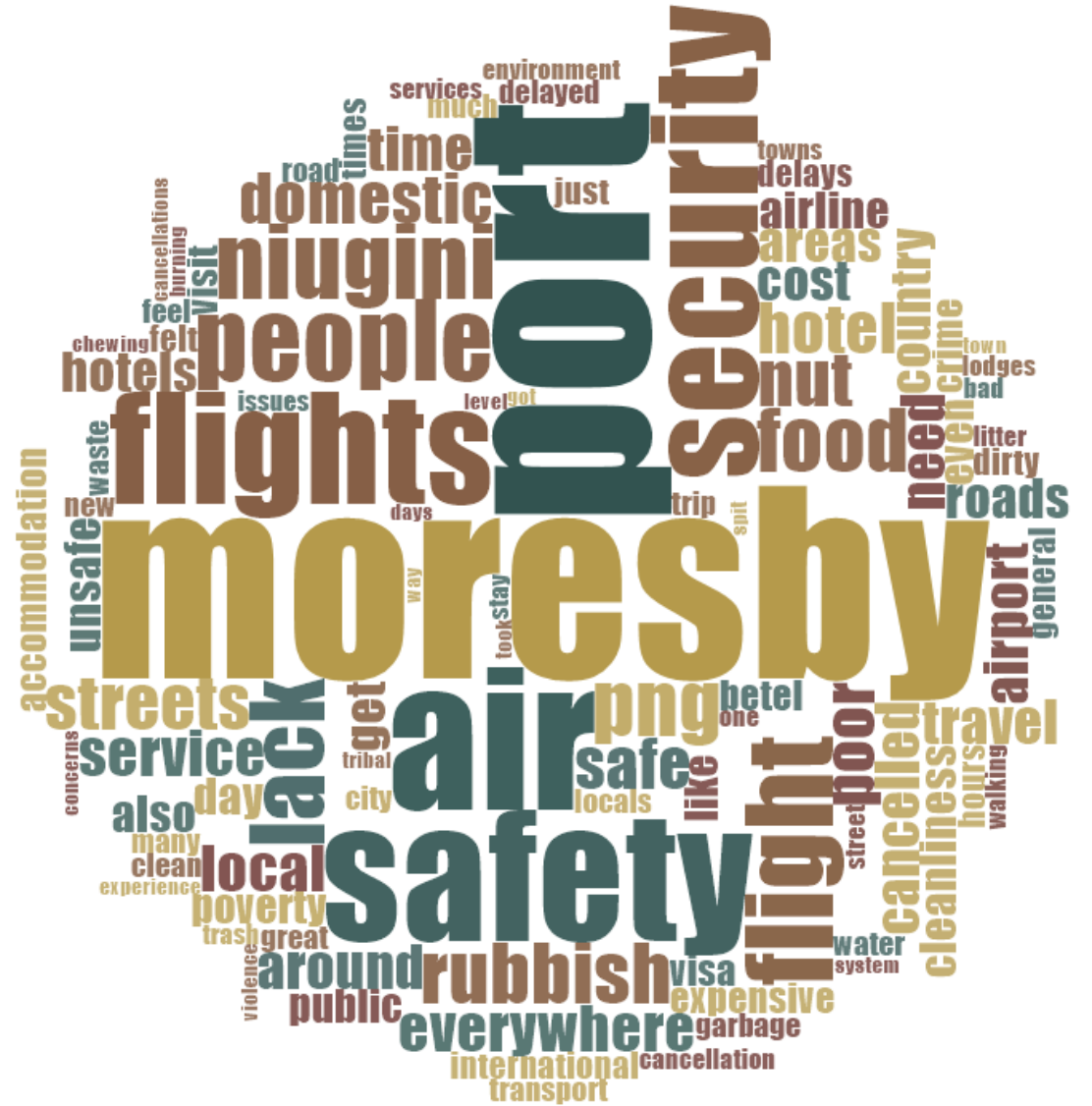
Q What did you find least appealing about PNG?



Share of Responses

*Note: Total response N=568. Multiple response analysis, so total does not add up to 100%*

## Quotes for least appealing aspects of PNG



# Least Appealing Aspects – Safety and Security



- + Corruption and unrest is palpable.
- + Too many securities that paint bad picture about the crime rate.
- + We aren't permitted to leave the hotel compound, after being dropped back by a driver, so we didn't get to see any of the activities or attractions.
- + Bad roads on certain sections. Chaotic airports and flights. Generally expensive. Advisory for safety in travel.
- + Safety and security was a major concern and restricted my movement significantly.
- + Port Moresby is dirty and unsafe. It looks uncared for and that locals are not happy living there. I couldn't recommend to anyone to visit there.
- + Safety. The hotel where I stayed insisted on someone accompanying me from the hotel if I went off property. They said it wasn't safe.
- + All the tribal fighting in Port Moresby, against the Highlanders, that's scared. Plus all the public walking in between traffic, selling stuff in your face.

# Least Appealing Aspects – Flights, Airlines and Airports



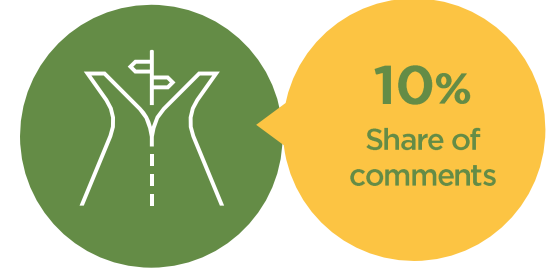
- + Air Niugini and attempting to visit other parts of PNG other than Port Moresby.
- + Immigration - asking for coffee money!!!
- + Air Niugini were so hard to deal with for domestic flights. I understand the NOTAM for Mt Ulawun eruption, however they refused to compensate us for cancellations and delays even after the Code Red was lifted and airport opened. Ongoing cancellations for almost a week (9 days after eruption!!) and lack of service. 4 missed international connections.
- + Kokopo Departure area/lounge was just a chalk of block. Passangers had to wait for 1-2 hours to be served.
- + Organisation and overcrowding at domestic airport - it was terrible; cost of visa - too high; overnight in POM - terribly dangerous.
- + Absolutely the worst airline - Air Nuigini. Not dependable - lots of flights canceled at the last minute resulting in missed connections and unplanned overnight stays in hotels.
- + Very disruptive flight schedule and flights delayed causing knock on delays.

# Least Appealing – Environment and rubbish



- + Rubbish on the street in Port Moresby.
- + Filthy streets and rubbish everywhere. Generally people don't care about this and it is sad that the government doesn't take more of an interest in the welfare of their people.
- + Cleanliness and quality of the streets (a lot of dirt and potholes).
- + The filthy state of the streets and the locals wandering around doing nothing. More work is needed in the provinces to keep the locals employed in their own areas.
- + Burning grass, burning plastics, lack of infrastructure.. They are exposed to technology faster than their ability to adapt.
- + There is always a lot of trash. It's worrisome that a woman can't feel safe without a man driving up and down the highlands highway or generally.

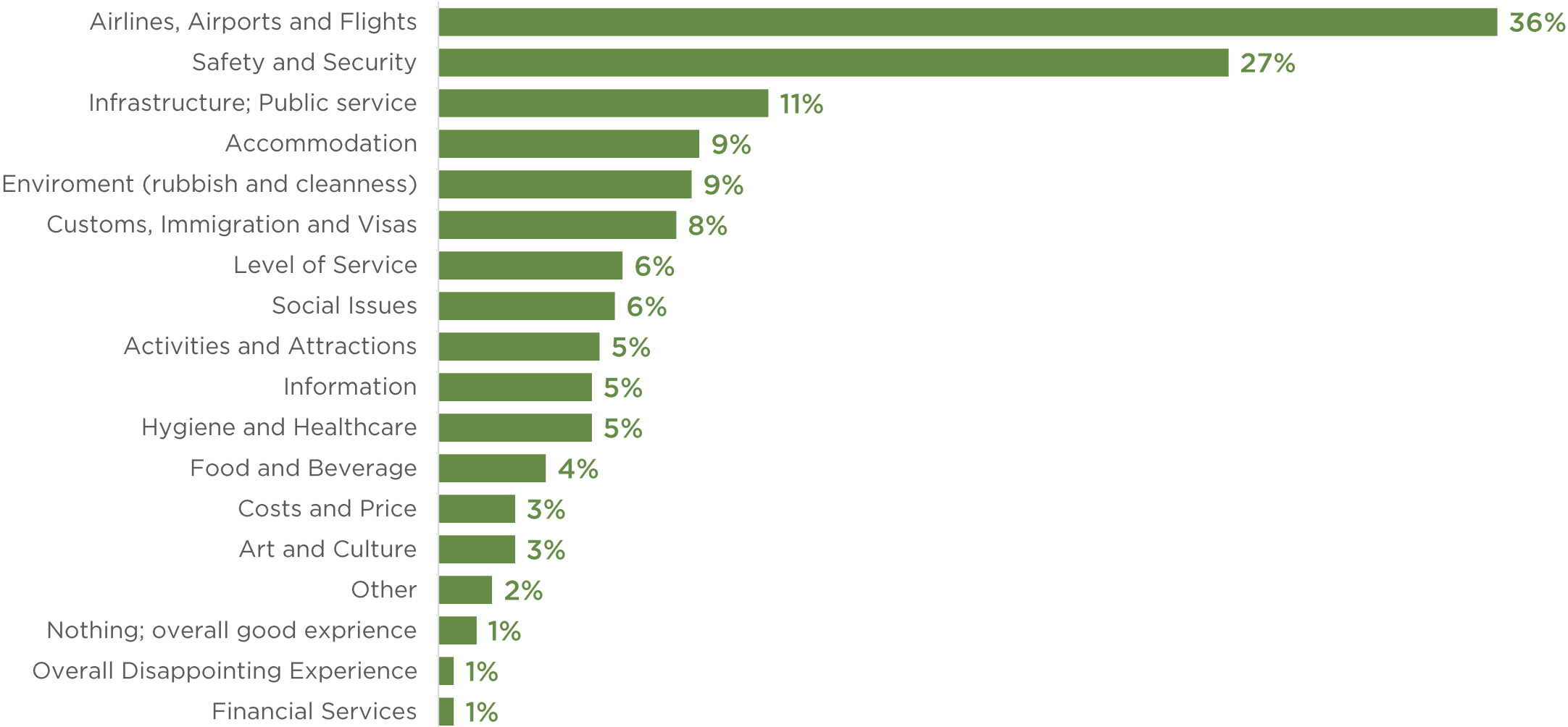
# Least Appealing – Infrastructure



- + Bad roads on certain sections. Chaotic airports and flights. Generally expensive. Advisory for safety in travel.
- + The lack of free wifi/internet access in the larger cities/towns. As I came from Great Britain my mobile phone didnt work with local telecom suppliers in Papua New Guinea.
- + Poverty, poor health, and poor infrastructure in Port Moresby ... seems that government is failing to adequately serve citizens even at basic levels.
- + The lack of basic facilities for the grass roots Papuan New Guineans!
- + The least attractive things were the absence of internet and phone connectivity, and when we arrived at Port Moresby there was no running water.
- + The corruption and the whole system, seems no human rights, traffic and roads system and road works. Safety and security not appealing too, etc.
- + Local transportation and the roads.
- + Dirty, towns overcrowded.

# Suggestions for Improvement - June-Nov 2023

Q Is there anything that could have improved your experience of PNG?

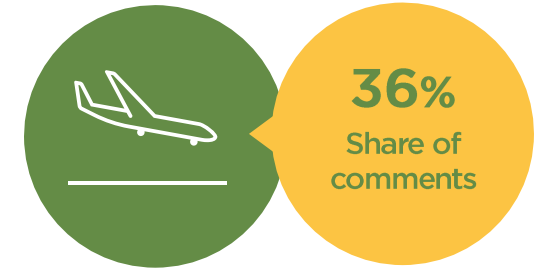


Share of Responses

*Note: Total response N=383. Multiple response analysis, so total does not add up to 100%*



# Suggestions for improvement – Flights, Airlines and Airports



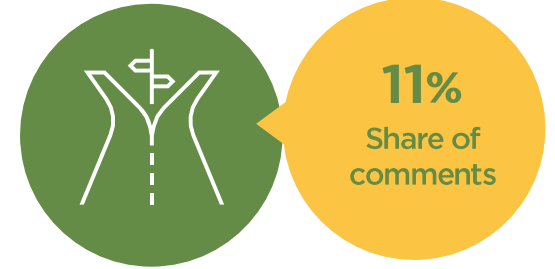
- + International travellers and tourists should be given VIP service  
Separate line and or que should be allocated at all airports.
- + Air Niugini getting their act together- its killing tourism (and your country is beautiful and people should see all of it!).
- + Improve the airline service to the outer islands if you want more tourists to visit. Too many cancelations, delays and overbookings not including the long lines just to do check ins in the domestic terminal.
- + Port Moresby presentation of public spaces and cleanliness needs improving. The disorganisation and delays at the domestic airport are a disincentive for visitors.
- + Air travel within PNG with Air Niugini was very unreliable and resulted in an overnight in POM on the way. Although Air Nuigini were good and arranged a hotel it meant having to re-arrange my plans for my visit.
- + Proper flight schedule and clean hotels in Moresby.
- + Cost of airfare and accommodation.

# Suggestions for improvement – Safety and Security



- + More city clean up jobs and surveillance cameras for safety.
- + Make it safer for the tourist so they can come back, and work on customer service training as it seems there is no effort put in.
- + Security and safety of the international visitor. Freely visit to beach and local areas.
- + Security issues need to be addressed to encourage easier exploring of the city.
- + Not feeling safe after dark except in a guarded compound.
- + Security especially in Port Moresby, general hotel availability in certain regions and to help local guesthouses in villages with basic running water showers and toilets.
- + Continue to strengthen security. PNG is a beautiful, exciting country.
- + Sort out the tensions on the Kokoda trail so local people benefit and visitors are not threatened.

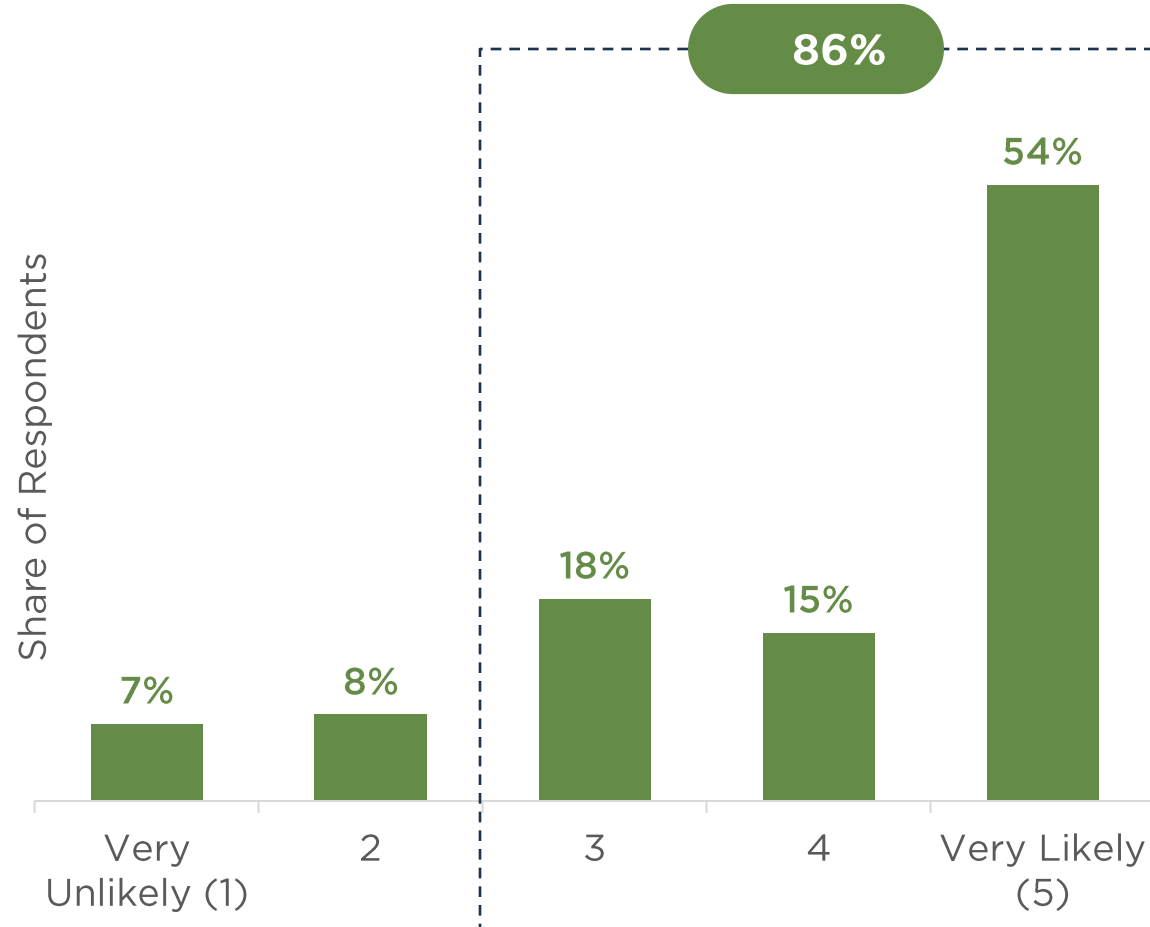
# Suggestions for improvement – Infrastructure



- + Fill in the potholes in the roads.
- + Improve road quality, organize airport and flights more professionally, provide more accommodation options at reasonable prices.
- + Better modes of public transport.
- + Local transportation needs to be overhauled and regulated. Safer, cleaner vehicles when public are riding, and metered.
- + Improve the security and safety conditions, and infrastructure.
- + Safety Constant riots Expensive accommodation and domestic flights Cancelled flights Lack of wifi Expensive food shopping Lack of save taxis.
- + Security especially in Port Moresby, general hotel availability in certain regions and to help local guesthouses in villages with basic running water showers and toilets.
- + The market rather than women sitting down in the ground the government can built a good market for them.

# Willingness to return to PNG - June-Nov 2023

## Willingness to return to PNG



## Quotes: Reasons to not return

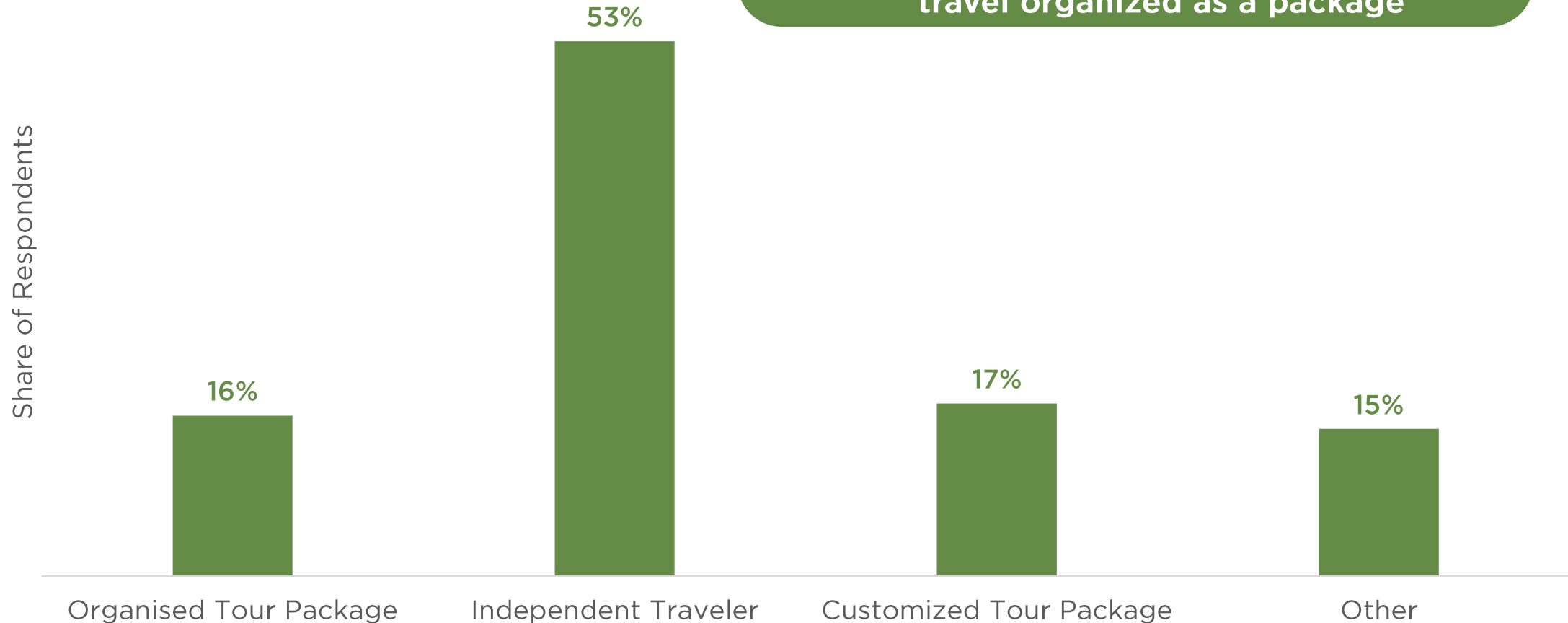
- + I did not feel safe to go out on my own, nor was this recommended by the locals, safety is a concern.
- + No Value for money. Too dangerous.
- + Airline is not reliable enough.
- + We are getting too old to make many more international trips..
- + It's so far from Europe. Expensive flights to PNG from Europe.
- + It's far to travel and expensive and no freedom to enjoy beautiful county.
- + Extorted by customs.
- + We first came to PNG in 1981 and both my wife and I are 70+.

# Visitors Willing to Return – Preferred Package for their Next Trip to PNG - June-Nov 2023

86% of Visitors will return

53% will opt to organize their own travel

33% will opt to have all or some of their travel organized as a package



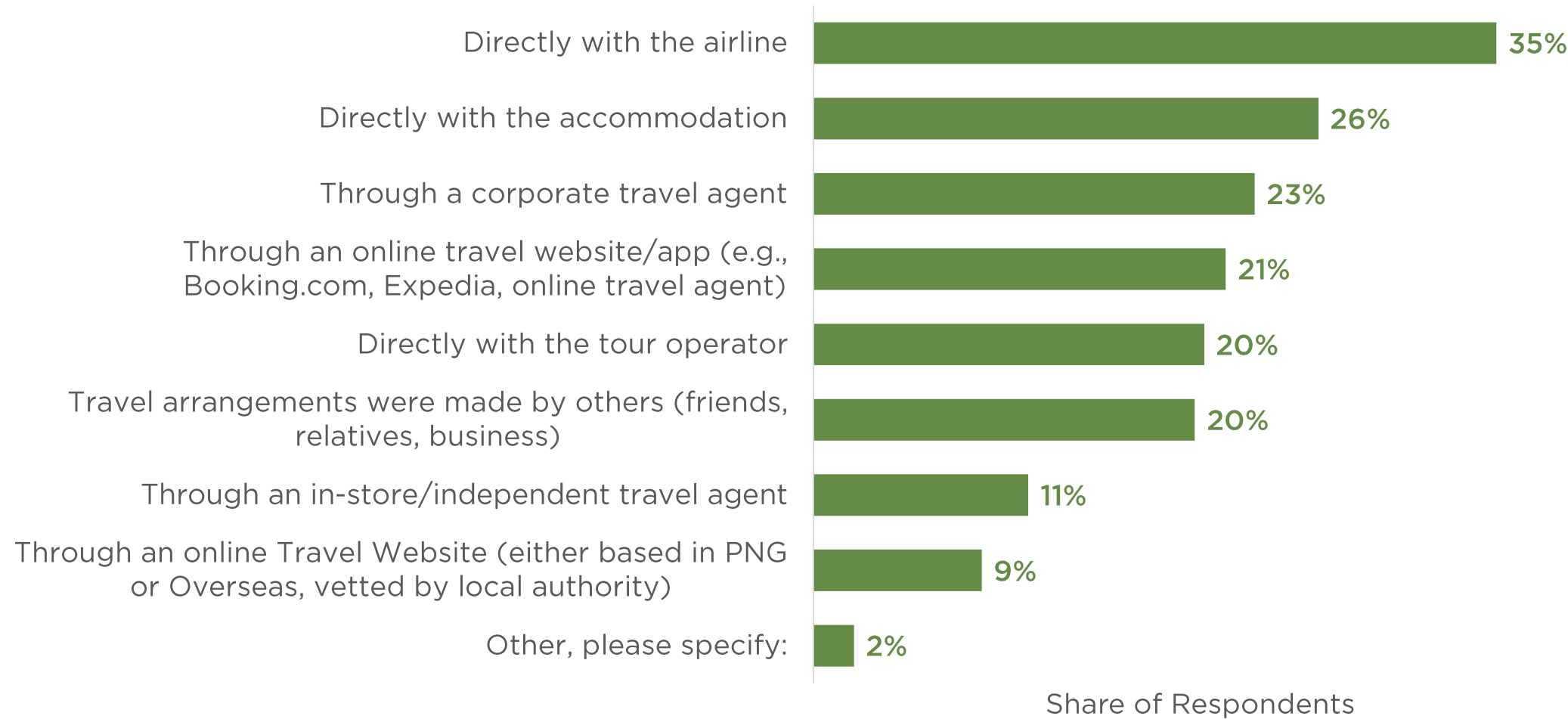
Note: Due to rounding, total does not sum to 100%

# Visitors Willing to Return – Preferred Booking Channel for their Next Trip to PNG - June-Nov 2023

68% of Visitors will return

82% will book direct

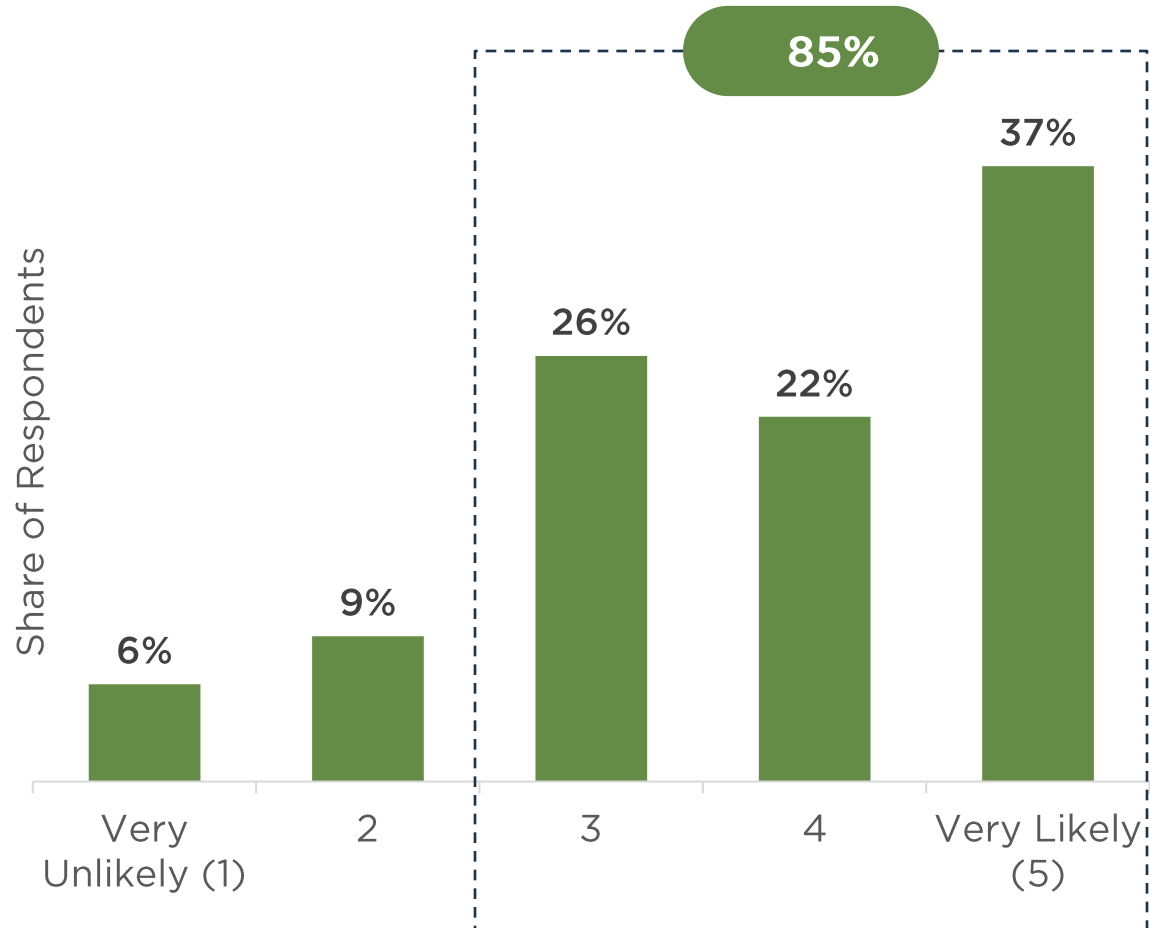
64% will book via OTA/TA



*Note: Due to rounding, total does not sum to 100%*

# Willingness to recommend PNG - June-Nov 2023

## Willingness to recommend PNG



## Quotes: Reasons to not recommend

- + Extorted by customs.
- + Security and difficulty of remote villages travel.
- + I don't feel PNG is yet ready for a tourism industry - I would focus on creating a safe environment for travelers.
- + Most people I know travel for business or sport.
- + Too difficult to travel independently.
- + lack of tourism destinations.
- + Safety. Not a holiday if you cannot travel, walk along the beach in the capital!
- + Unless you visit on a cruise, I think it is not particularly safe for white people.



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**FOREIGN AFFAIRS & TRADE**  
Manatū Aorere



*Papua New Guinea*  
**A MILLION DIFFERENT JOURNEYS**  
Tourism Promotion Authority



This report was prepared at SPTO by the Pacific Tourism Data Initiative team, in collaboration with PNGTPA and the New Zealand Government.

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