

PAPUA NEW GUINEA

International Visitor Survey Report
January – June 2024



Acknowledgements

- ❖ The Pacific Tourism Organisation (SPTO) expresses its gratitude to all contributors to this report on IVS data from January to June 2024, 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.

Executive Summary

- ❖ The survey, conducted from January to June 2024, analyzed 1,876 responses out of 1,936 collected, representing 5% of actual visitors with a 24% response rate. Among the respondents, 42% were first-time visitors, and the average household income was USD 83,411.
- ❖ Visitors were primarily attracted by nature attractions, cultural experiences, business opportunities, and connections with family and friends in Papua New Guinea. Historical aspects, such as World War II history, also played a significant role. Overall visitor satisfaction was high, with a rating of 4 out of 5. A substantial 85% of visitors indicated they would recommend PNG to others, and 88% expressed willingness to return.
- ❖ The average prepaid spend per visitor was USD 2,286, with an estimated 65% (USD 1,486) flowing into the local economy. In-country spending per visitor per trip averaged USD 1,620, with an average stay of 11.7 nights.
- ❖ This contributed to an *estimated** economic impact of USD 150 million from January to June 2024.
- ❖ Visitors found the natural beauty, friendly locals, and cultural diversity most appealing. However, safety concerns, high costs, and challenges with domestic flights and infrastructure were the least appealing aspects. To improve the overall visitor experience, suggestions included enhancing cleanliness, improving safety and security, and addressing issues with domestic air travel.

*Note: *based on total visitor numbers of 48,478 for the same period*

Background

- ❖ The PNG International Visitor Survey is an initiative of the Pacific Tourism Data Initiative, funded by the New Zealand Ministry of Foreign Affairs and Trade (NZMFAT), and conducted by the Pacific Tourism Organisation (SPTO). IVS data from January to June 2024 is analyzed to understand the visitor experience and gain insights into tourism recovery in Papua New Guinea after the border reopening.
- ❖ The civil unrest in early 2024, which included protests by law enforcement officers over salary deductions, escalating to looting and destruction in major cities, and resulting in a state of emergency and significant political actions, saw visitor arrivals for the 6-month period decline to 48,478 from 54,953 in the same period in 2023. Despite this, PNGTPA's marketing campaigns and significant cultural events played a crucial role in increasing the average spend per visitor per trip by 17.2%, rising from USD 2,649 to USD 3,106. This resulted in an overall estimated injection of USD 150 million into the local economy, which was 40.2% more than the previous period's USD 107 million. Additionally, despite multiple votes of no confidence against Prime Minister James Marape, the government's focus on youth mobilization, the national census, the PNG Games, and local level government elections highlighted efforts to stabilize and promote the country as a tourist destination.
- ❖ The report includes key sections on visitor profiles and characteristics, information and decision-making, visitor expenditure, and satisfaction. Visitor emails were collected through passenger arrival and departure cards. The estimated rate of prepaid expenditure flowing into the local economy is 65%, based on observations from other Pacific Island countries with their own international airlines. Further research is warranted to establish more accurate estimates. All amounts are reported in USD and PGK currency using average rates for the January to June 2024 period.

Disclaimer

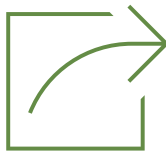
- ❖ **Reproduction of Material** - Information contained within this publication, including all charts, information, and graphical representations, may be used, reproduced, or published without prior approval from SPTO and PNGTPA. However, the information source must be explicitly referenced and acknowledged in all modes of representation.
- ❖ The **survey instrument** used to collect data for the January to June 2024 period was similar, but not exact, to the survey instrument used in the January to June 2023 period. New questions were added, a handful of existing questions were removed, and the response options for some questions were altered.
- ❖ N.B. Our analysis uses IVS respondents, weighted with January to June 2024 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 (January – June 2024)



7,711

TOTAL EMAILS SENT



1,876

RESPONSES ANALYSED

24%

CONVERSION RATE

Note: 1,936 responses were received. After data cleaning, 1,876 responses remained.

RESPONDENTS REPRESENT



2,320

ADULTS



146

CHILDREN

5%

OF ALL VISITORS IN THIS PERIOD

Note: The above breakdown is derived from the Local Spend Question – How many adults and children were included in your local expenditures?

PNG International Visitor Survey

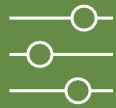
Snapshot January – June 2024



Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

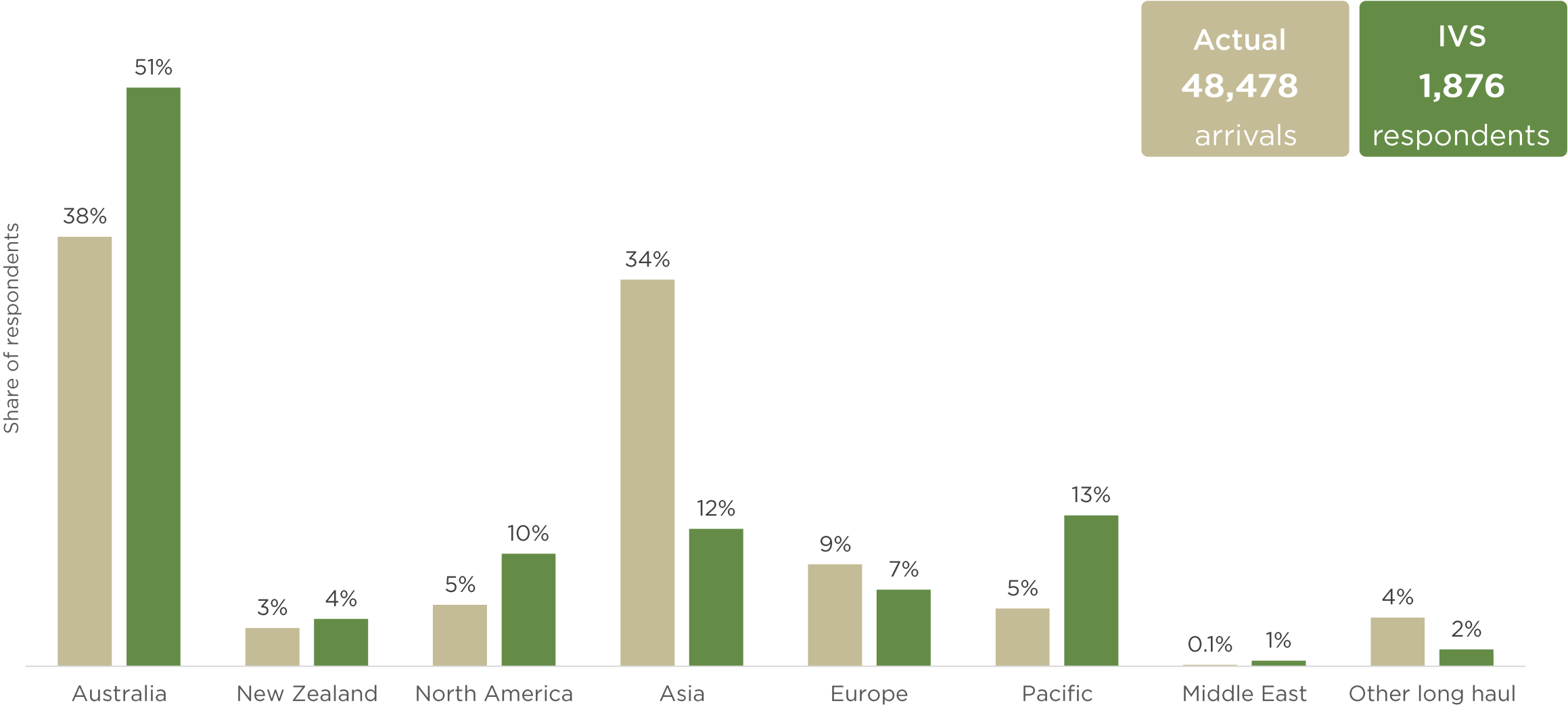


Visitor Spending
& Impact



Visitor
Satisfaction

Source Markets: IVS Respondents vs. Actual Arrival

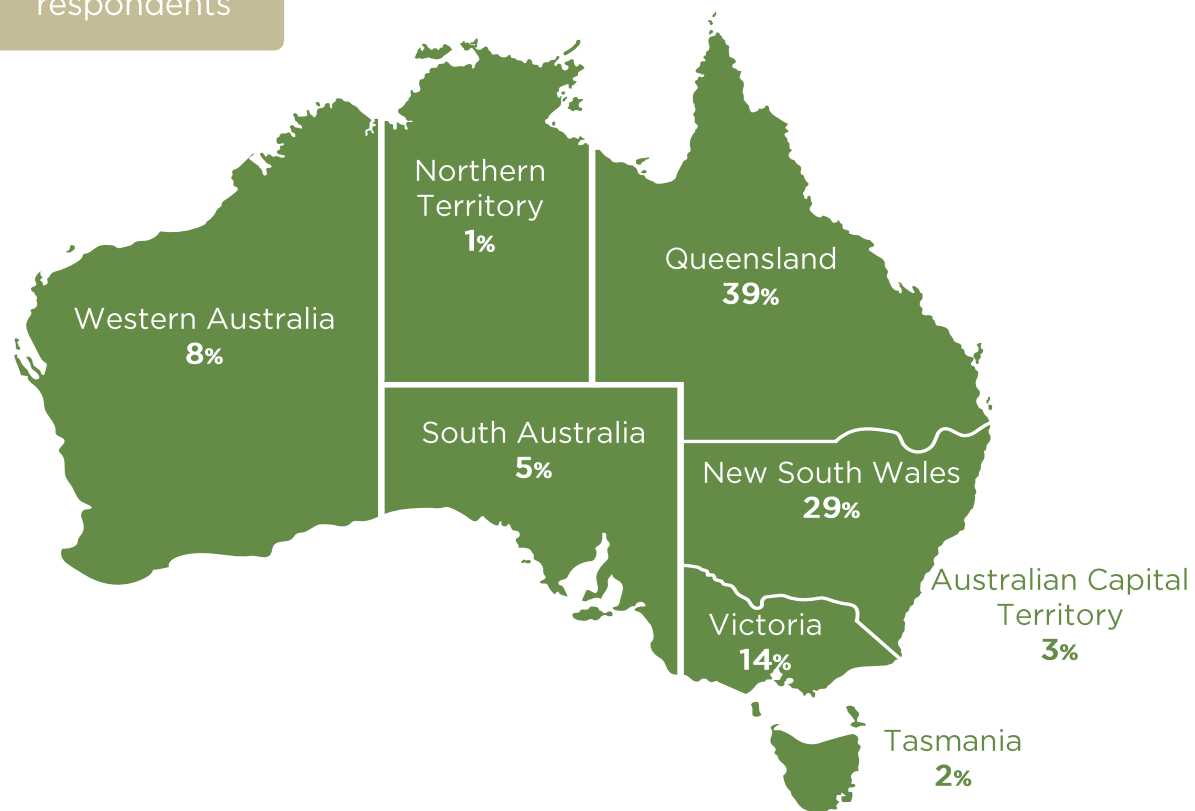


Note: The data presented is unweighted. To ensure a representative sample, weighting was applied to adjust for any undersampling or oversampling by source market.

Top Source Markets – Australia & New Zealand

716

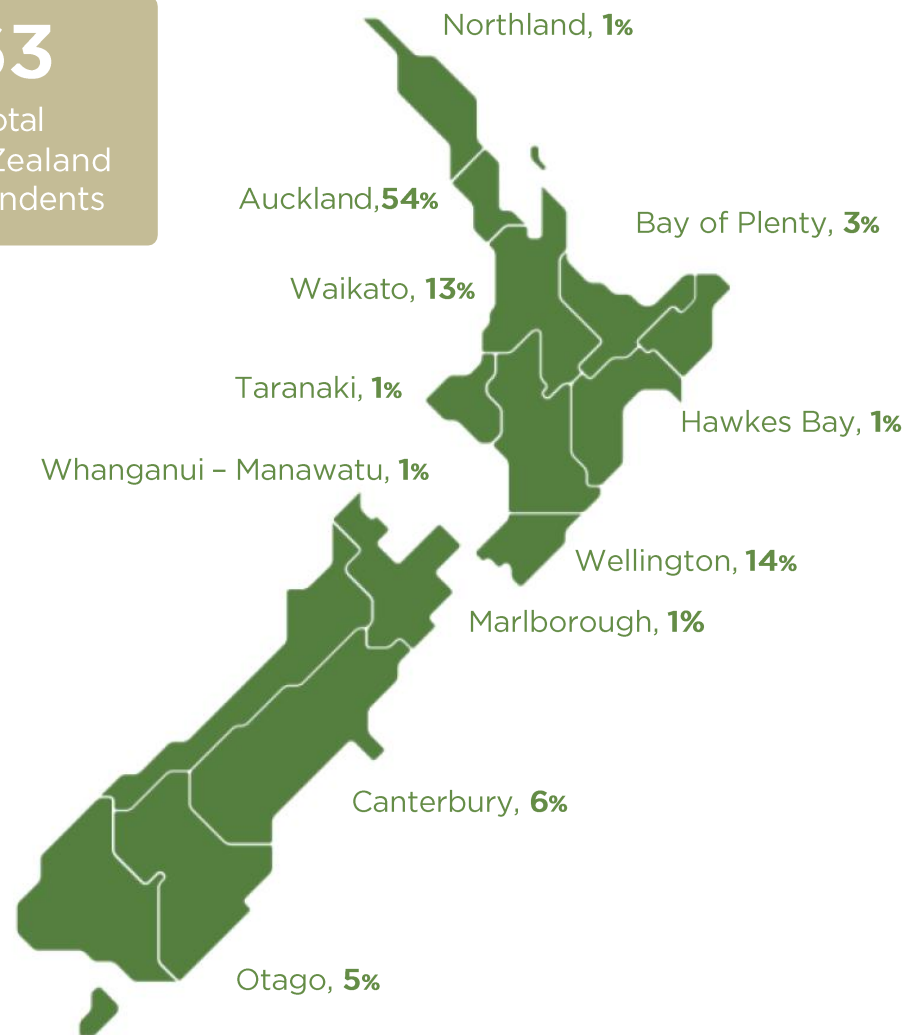
Total
Australian
respondents



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

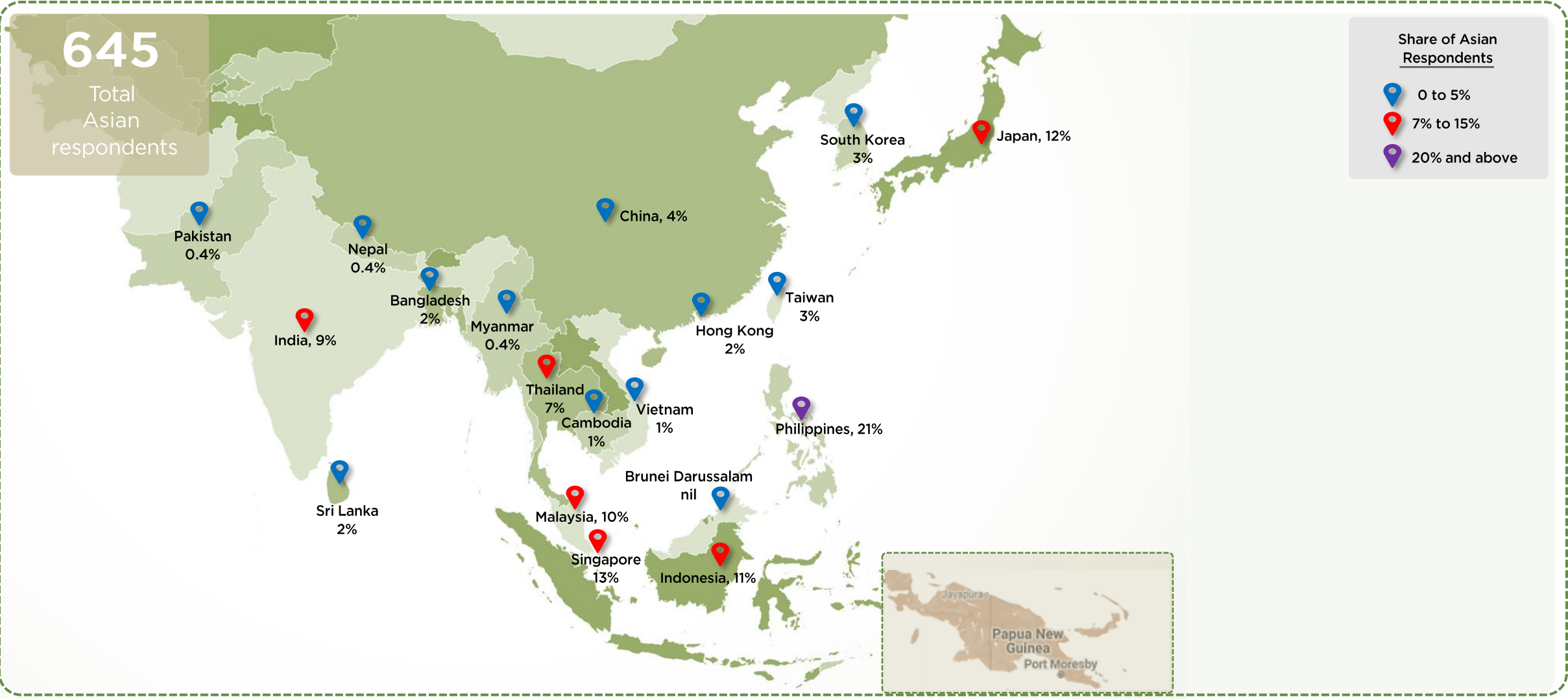
63

Total
New Zealand
respondents



Auckland, Wellington and Waikato made up **81%** of all New Zealand respondents

Top Source Markets – Asia

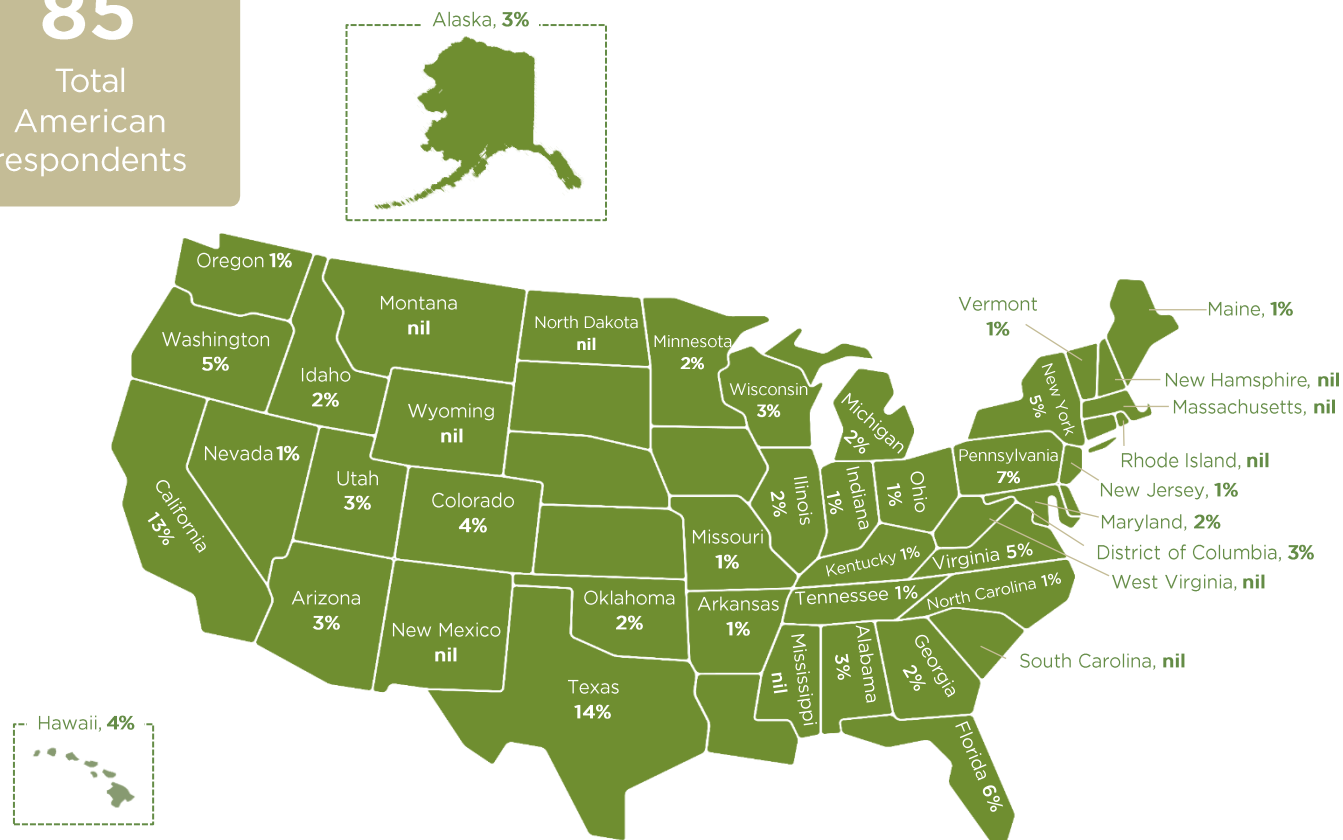


76% of Asian respondents are from the Philippines, Indonesia, Singapore, Japan, India and Malaysia.

Top Source Markets – North America (USA & Canada)

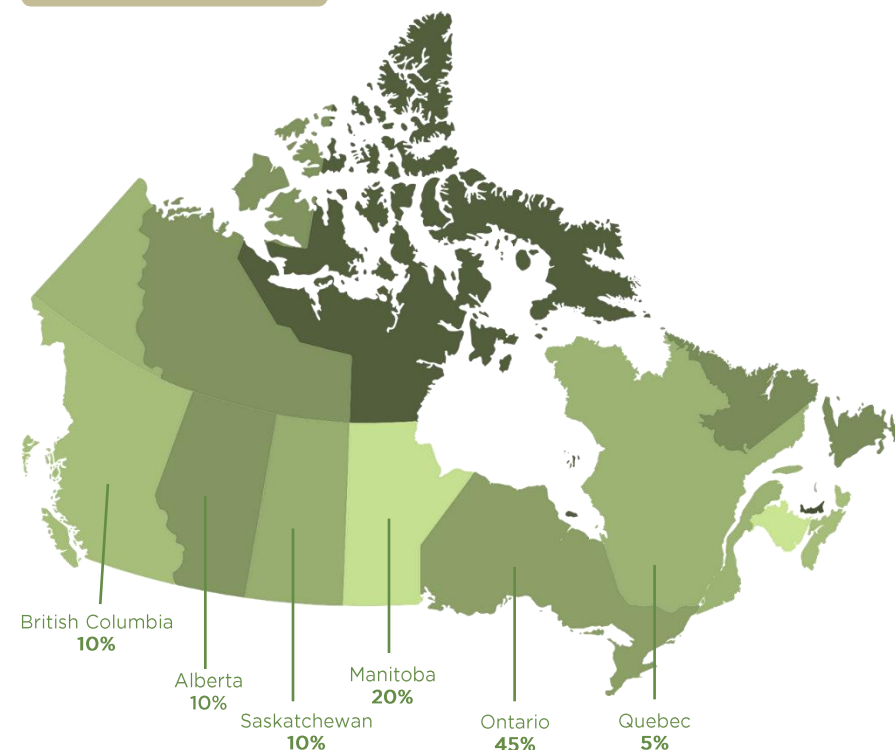
85

Total
American
respondents



11

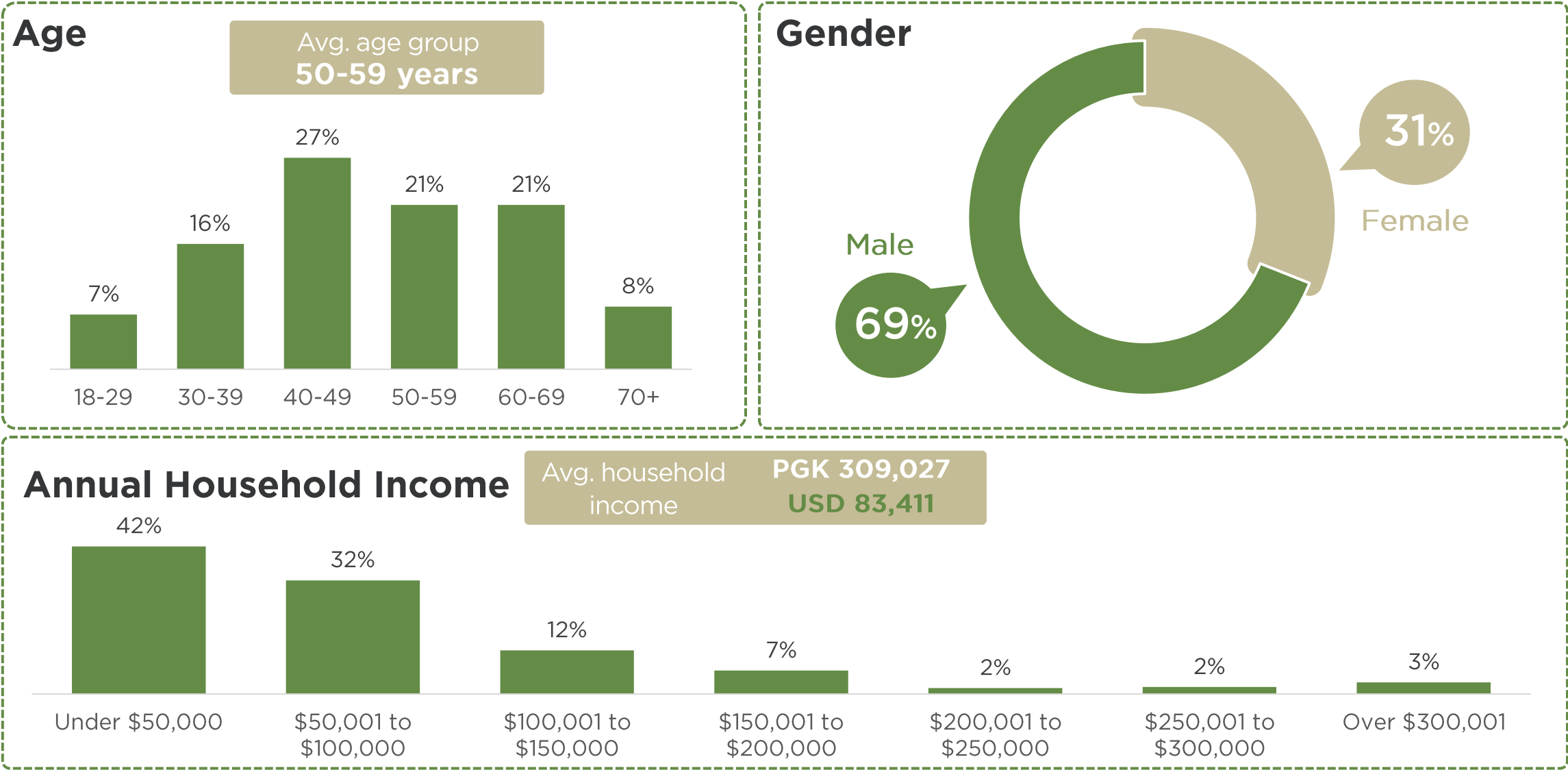
Total
Canadian
respondents



Respondents from 34 US states (including Hawaii and Alaska) visited PNG. No respondents from Connecticut, Delaware, Louisiana, Kansas, Nebraska, South Dakota, and Iowa participated. States with 'nil' percentages had no respondents.

Ontario and British Columbia made up 65% of all Canadian respondents

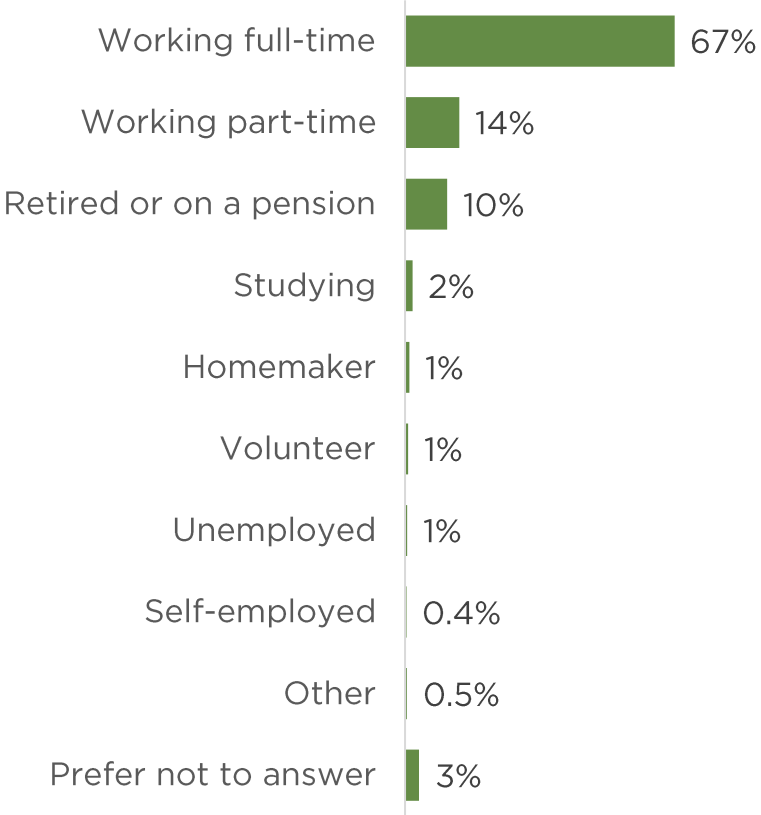
Respondent Demographics



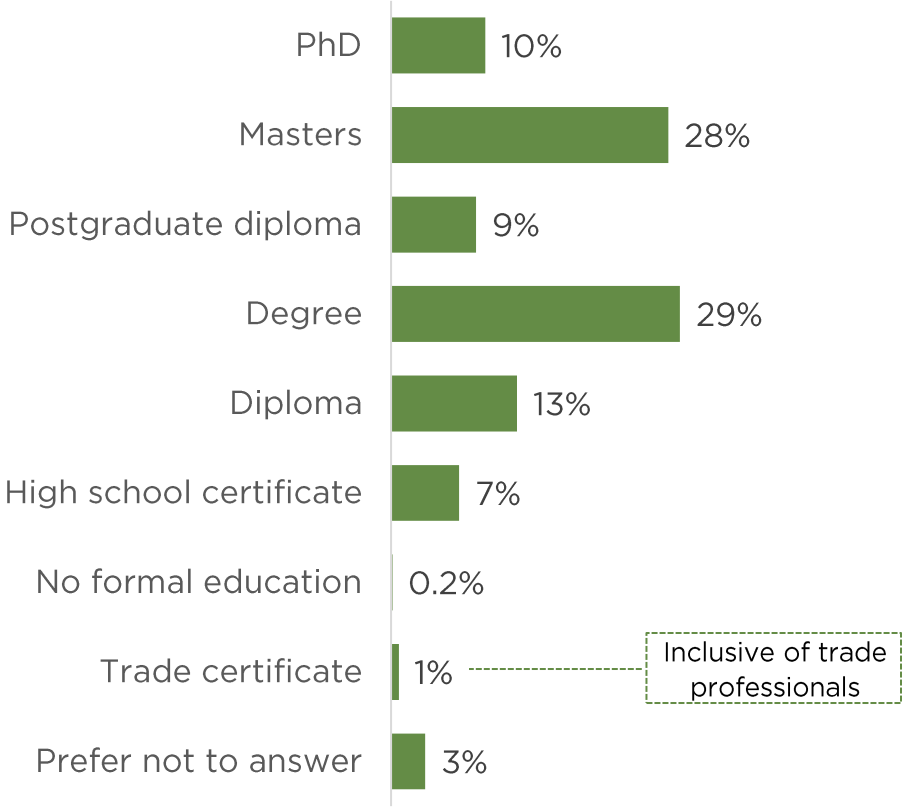
Note: Percentages reflect the share of IVS respondents and are weighted. \$ values are reported in USD, with incomes above USD 1 million treated as outliers. The average exchange rate to PGK and USD for June 2023 to May 2024 was applied.

Respondent Demographics

Employment status



Education level

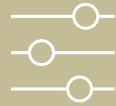


Note: Percentages reflect the share of IVS respondents and are weighted..

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact

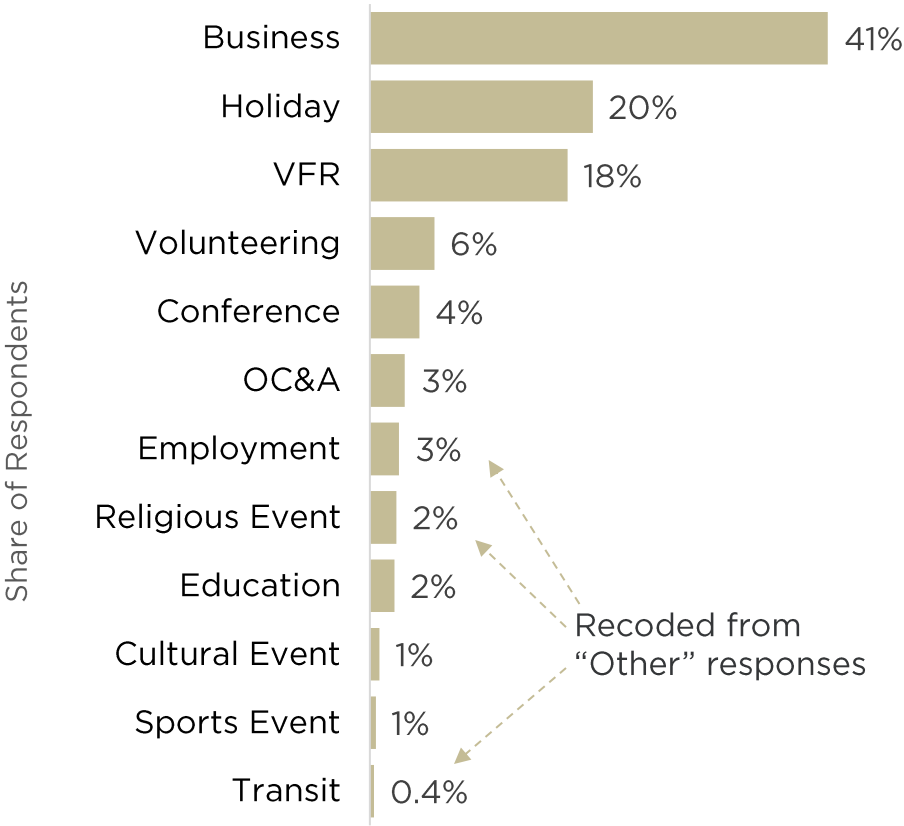


Visitor
Satisfaction

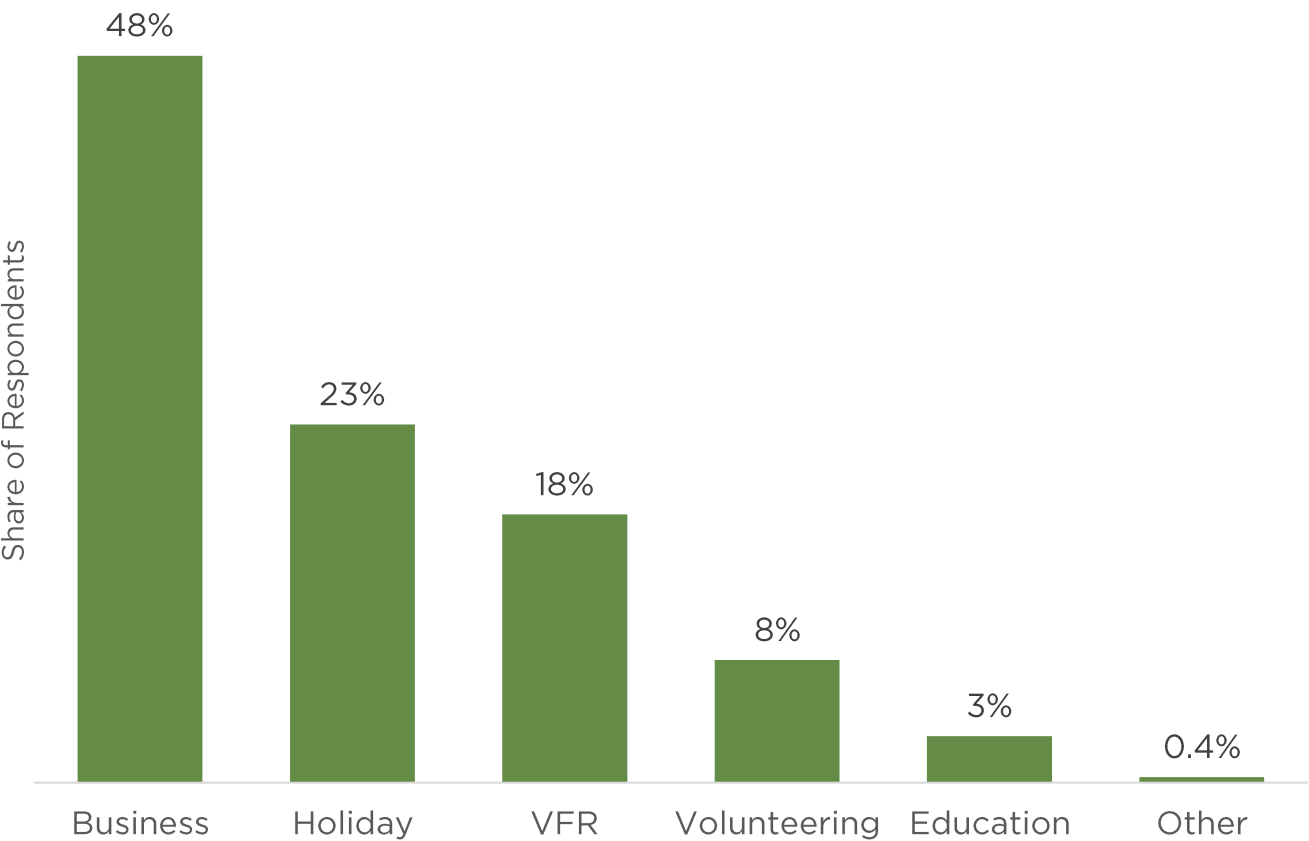
Purpose of Visit

Q What was the main purpose of your visit?

Survey Categories and Others-Recoded



Merged Categories



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

1. "Conference" and "Employment" are merged with "Business" | VFR stands for Visiting Friends and Relatives

2. "OC&A" ("Ocean Cruise and Adventures") and "Sport including special events" are merged with "Holiday"

3. "Religious event" is merged with "Volunteering" | "Cultural event" is merged with "Education" | "Transit" is merged with "Other"

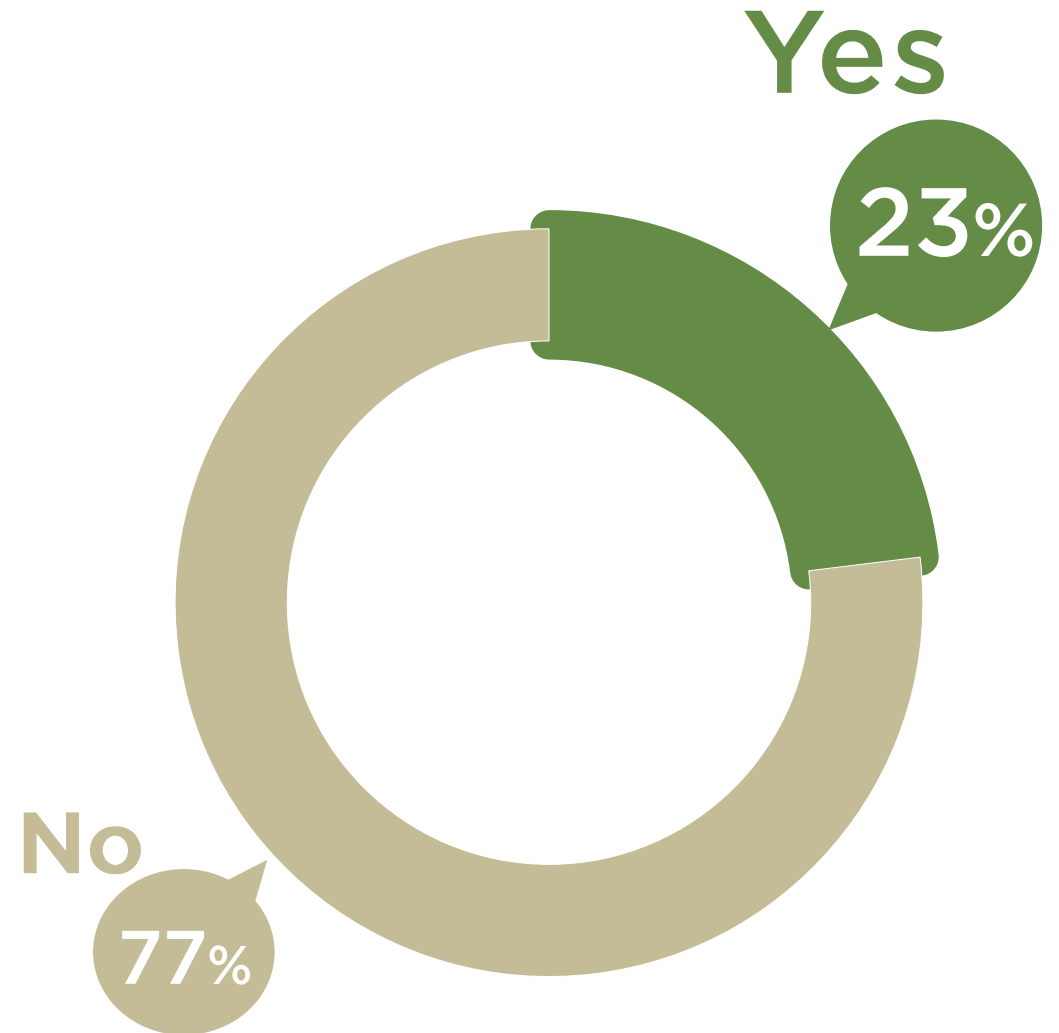
Bigger Trip

Other Countries Visited On The Same Trip



As part of a bigger trip, 78% of respondents visited Australia, with 35%, 14% and 9% visiting Singapore, Philippines and Indonesia, respectively.

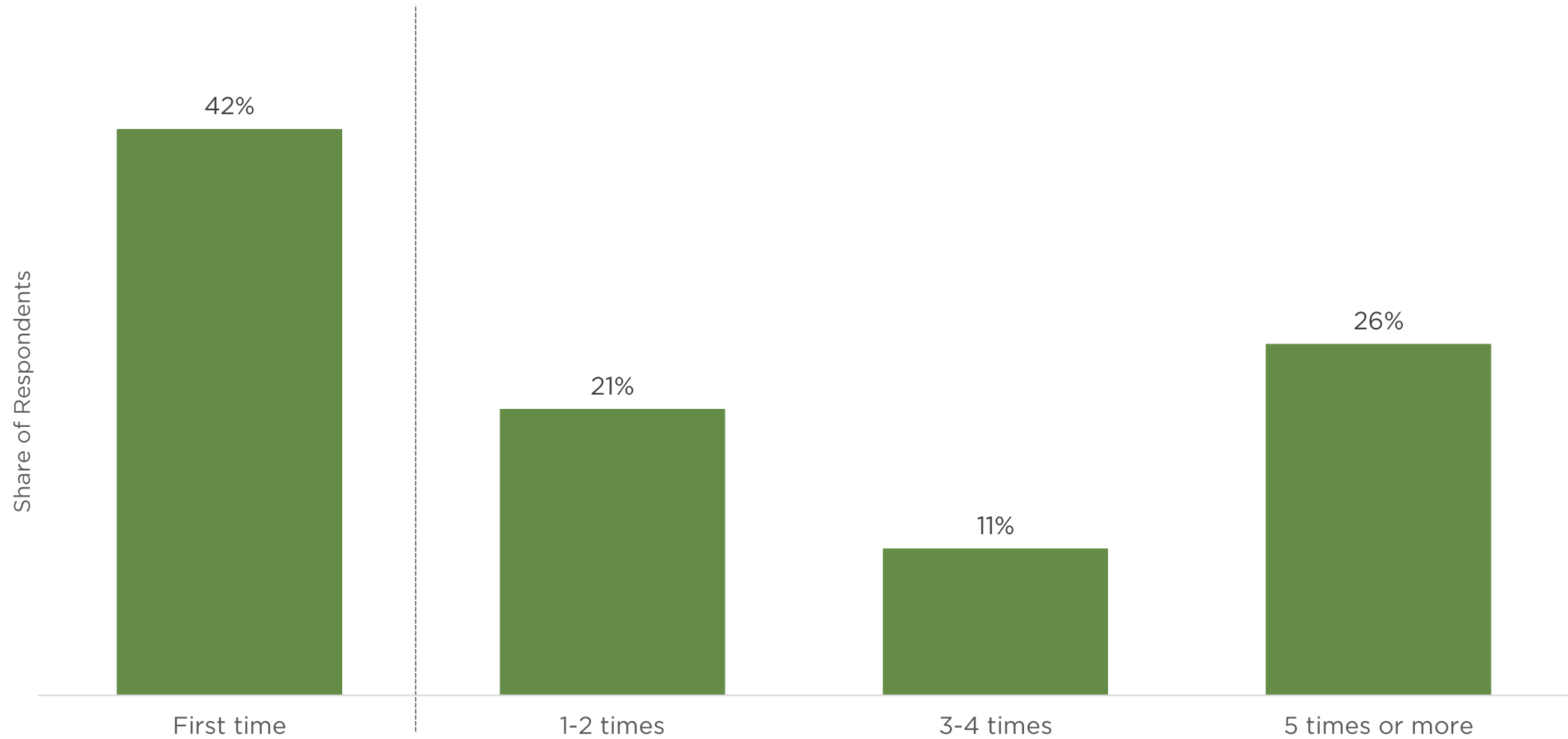
Q Was PNG the only country you visited on this trip?



Note: Total valid responses for this question N=1,865.

Previous Visits

Q How many other times have you been to PNG, not including this trip?

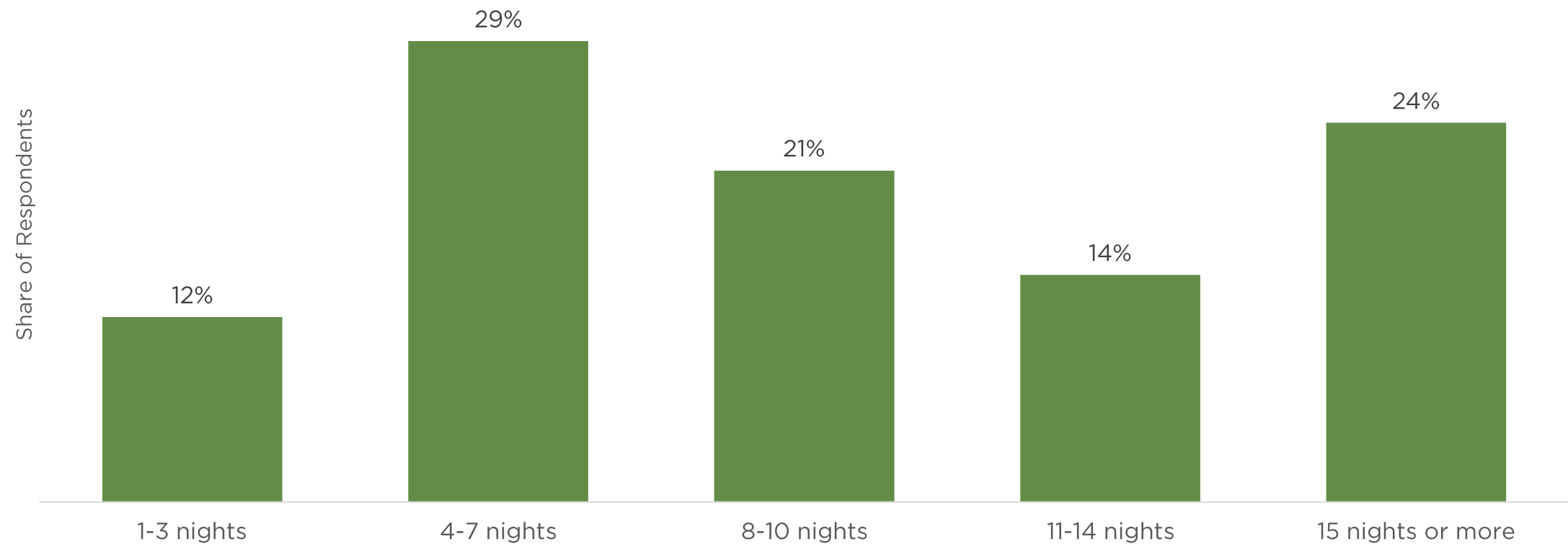


Note: Due to rounding, total does not sum to 100%.

Length of Stay (nights)

Q How many nights did you spend in PNG?

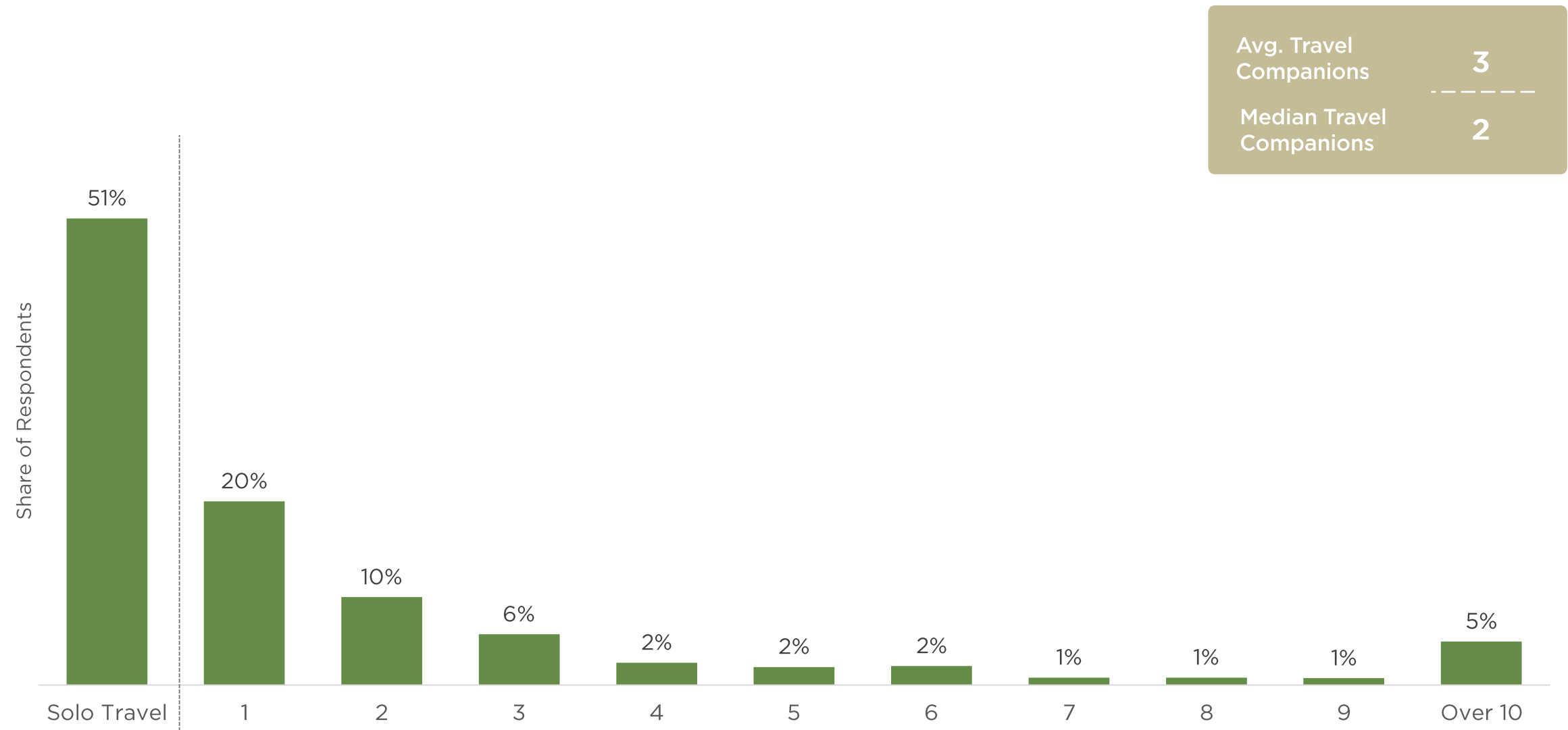
Avg. Length of Stay
11.7 nights



Note: Stays of 30 nights or more were excluded to focus on short-term visits. A 29-night threshold was set to include full-month stays, even in February.

Travel Group Size

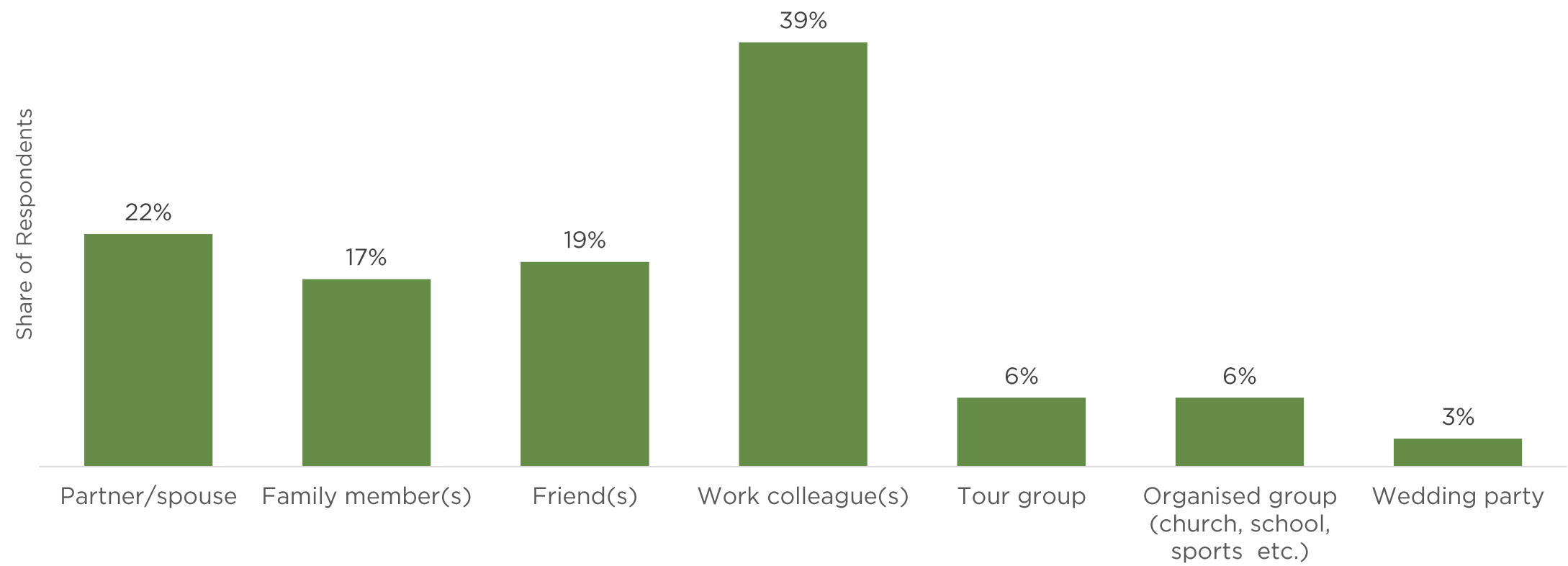
Q How many people accompanied you on this trip?



Note: The mean number of travel companions is 3 and the median is 2. Solo travelers (0 companions) were excluded to avoid skewing the results. The mean includes higher values, while the median shows that 50% of respondents have 2 or fewer companions.

Travel Companions

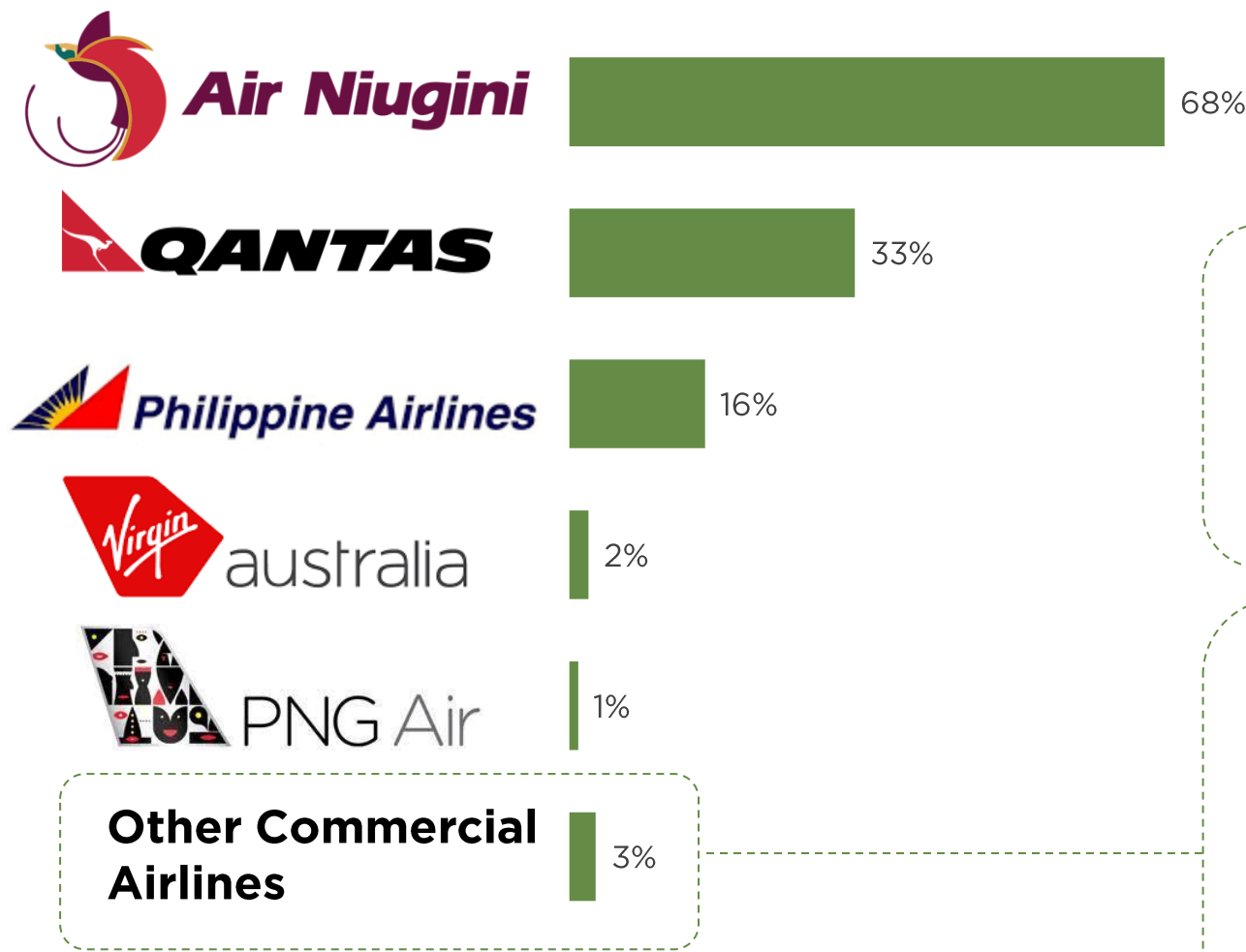
Q Who were your travelling companions?



Note: Percentages reflect the share of IVS respondents and are weighted. Data on travel companions, collected from January to May 2024, covers 6 months. Multiple responses may total over 100%.

Airlines Used for Travel

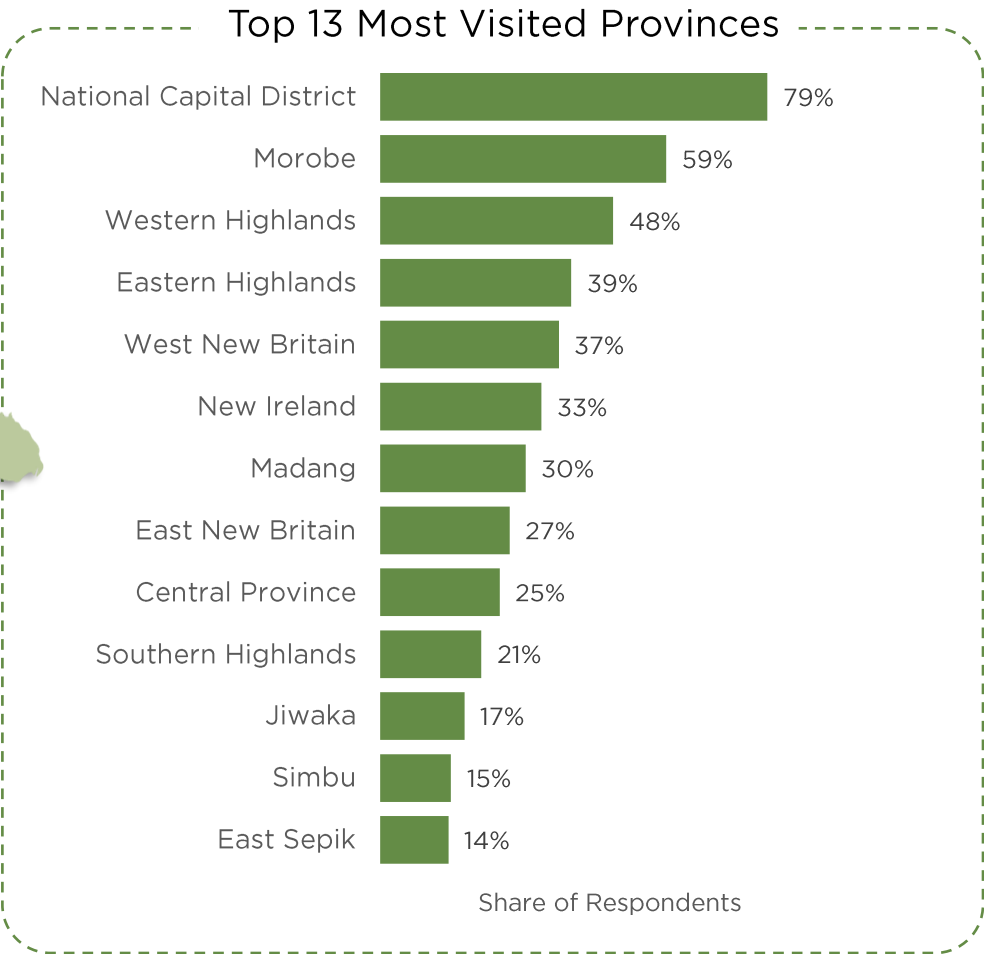
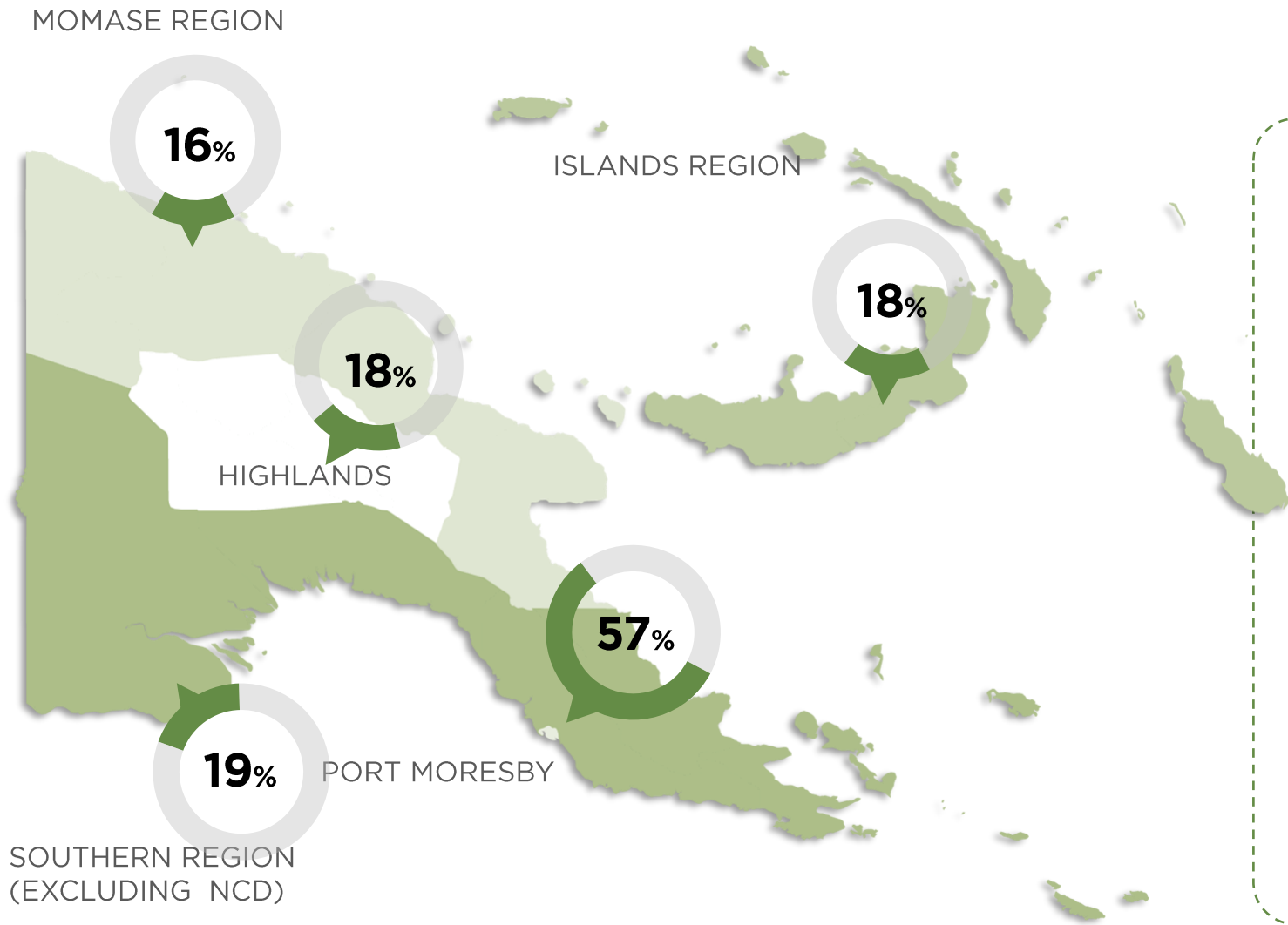
Q How did you travel to PNG?



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

Top Region and Provinces Visited

Q Which region(s) did you visit?



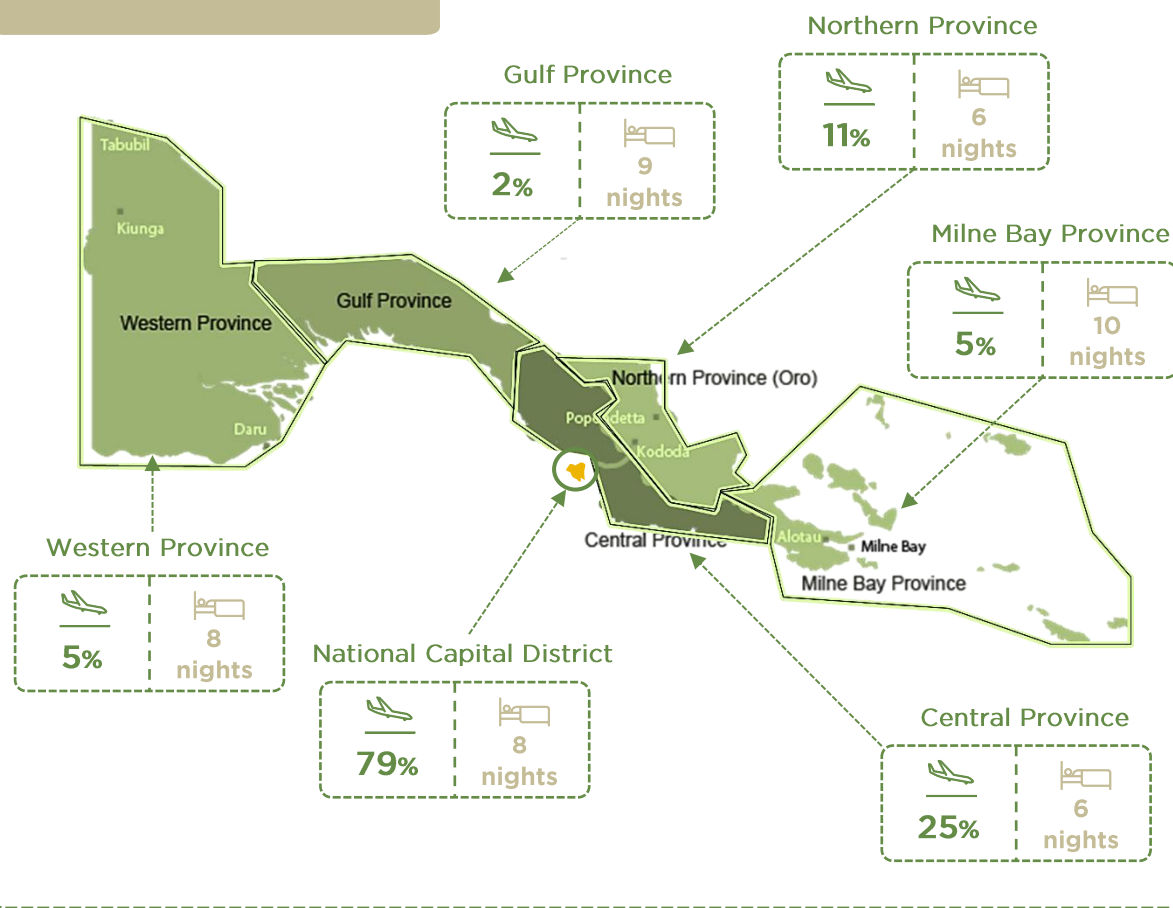
Note: Multiple responses, therefore total does not add up to 100%. NCD stands for National Capital District. ARB stands Autonomous Region of Bougainville.

Provinces Visited - Avg. Length of Stay

Q How many nights did you spend in each province?

Southern

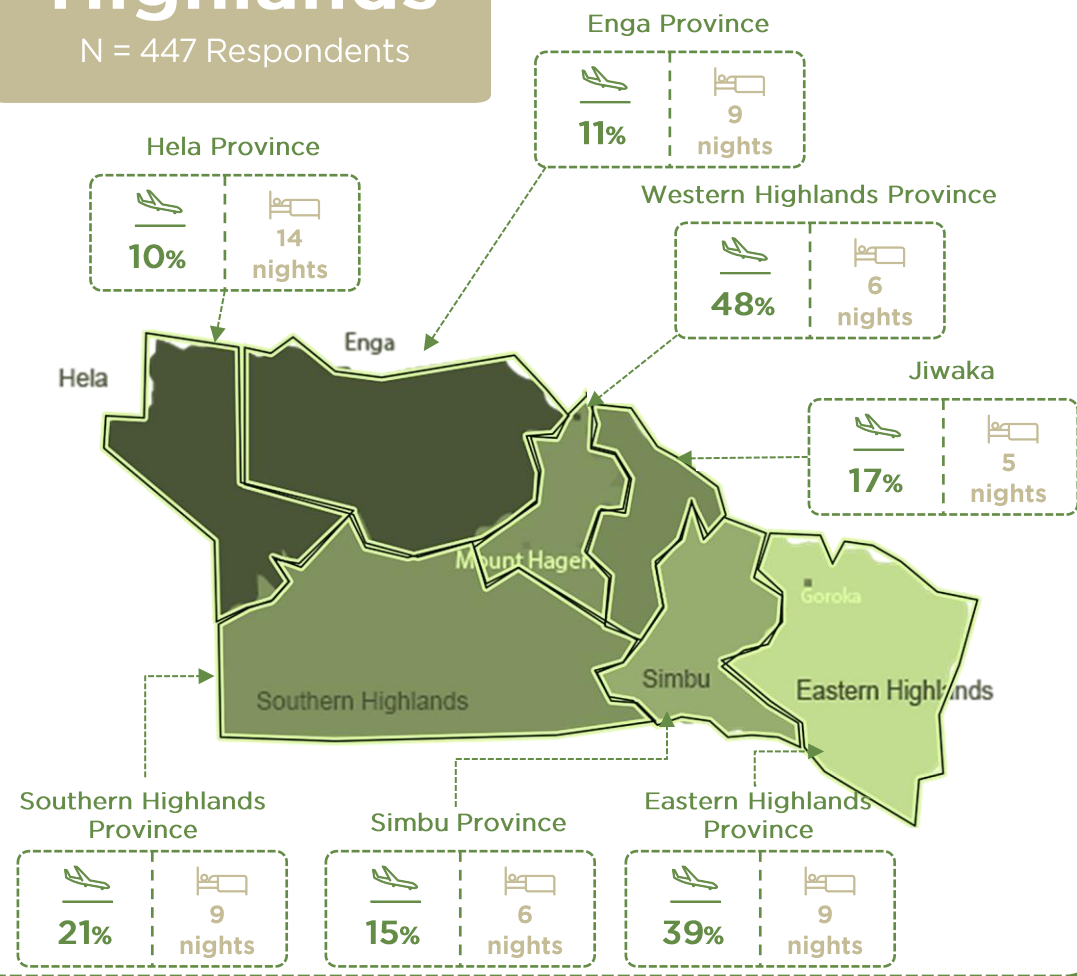
N = 1,530 Respondents



Overall Avg. Length of Stay for Southern Region = 9 nights

Highlands

N = 447 Respondents



Overall Avg. Length of Stay for Highlands Region = 12 nights

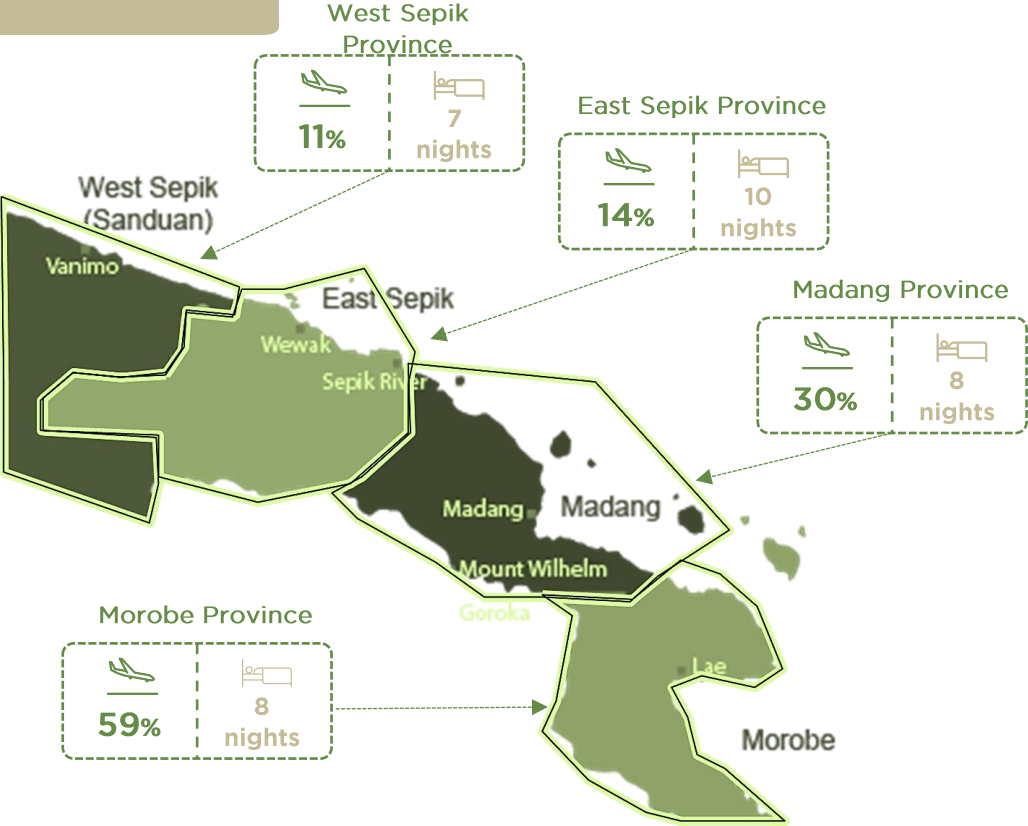
Note: Multiple responses, therefore total does not add up to 100%.

Provinces Visited - Avg. Length of Stay

Q How many nights did you spend in each province?

Momase

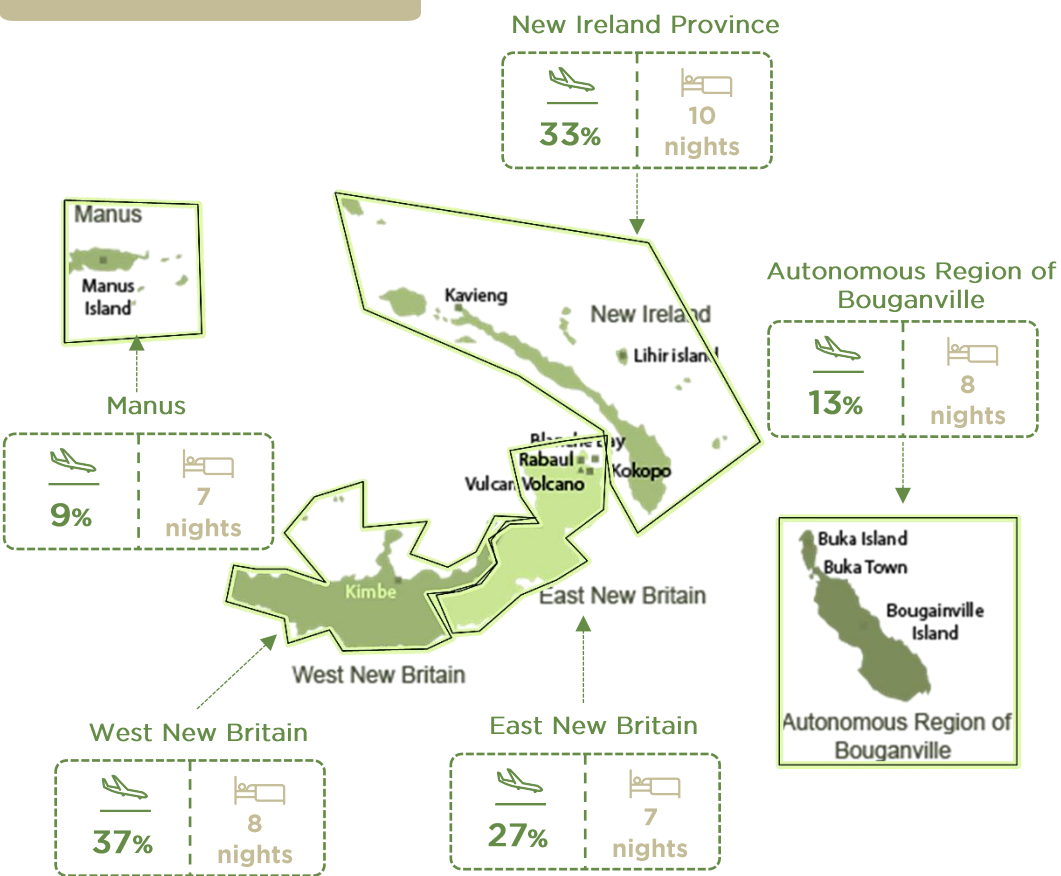
N = 289 Respondents



Overall Avg. Length of Stay for Momase Region = 9 nights

Islands

N = 341 Respondents

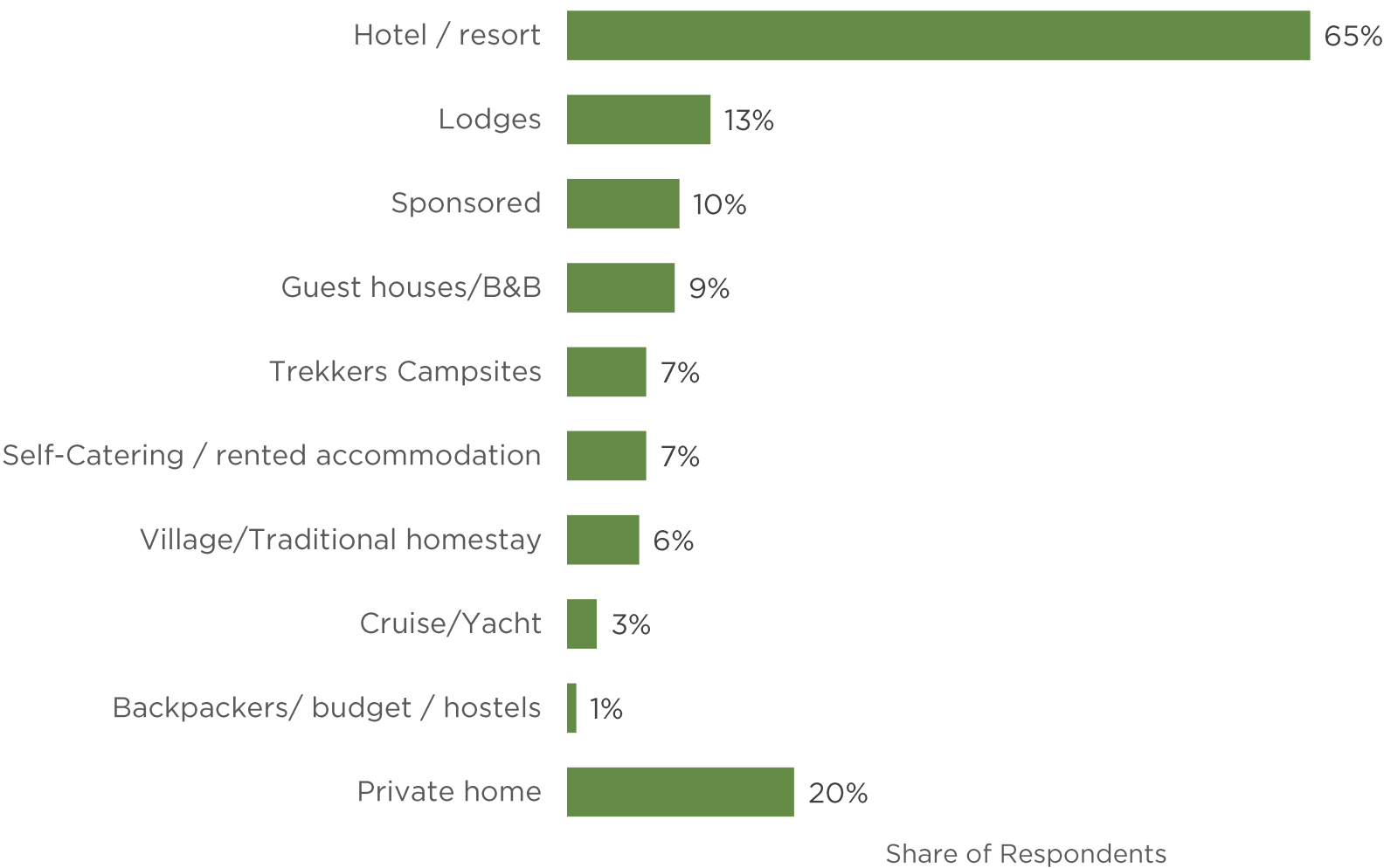


Overall Avg. Length of Stay for Islands Region = 10 nights

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

Type of Accommodation Stayed

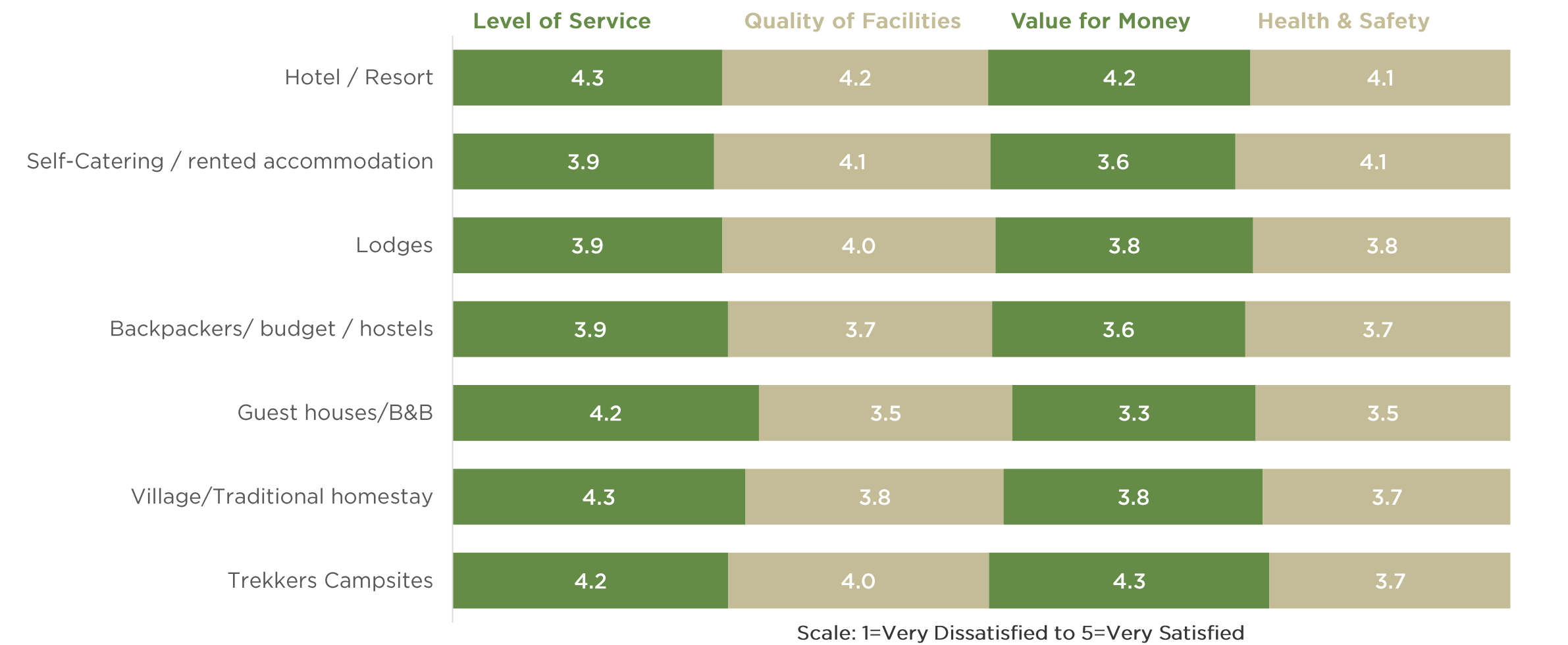
Q What type(s) of accommodation did you stay in?



Note: Totals may not add up to 100% due to multiple responses. "Sponsored accommodations" are provided by organizations or employers, while "Private home" refers to stays with family or friends. Respondents may use multiple accommodation types in a single trip.

Accommodation Satisfaction

Q How satisfied are you with the following aspects of the accommodation you stayed in?



Note: Score is the average of all the scores to each stated aspect of the accommodation.

Note: Ratings are shown with up to 1 decimal place to accurately reflect differences. Rounding could obscure important variations

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



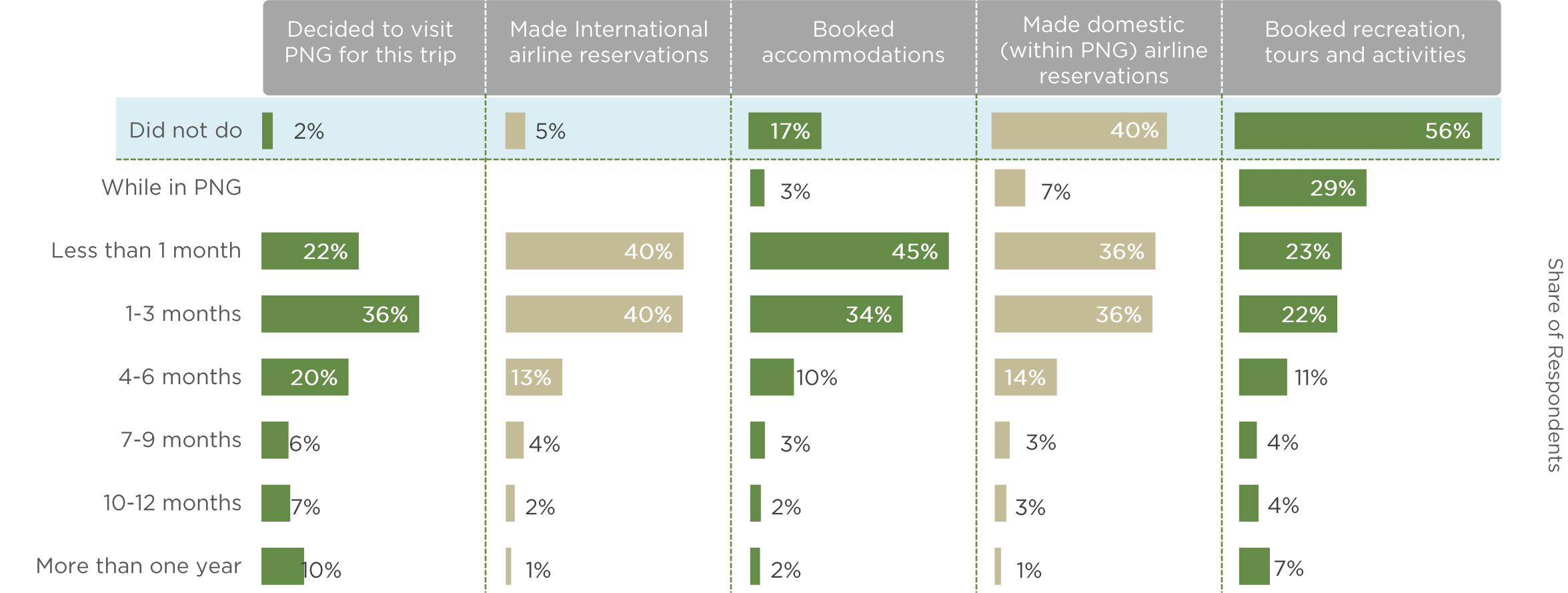
Visitor Spending
& Impact



Visitor
Satisfaction

Trip Planning and Booking Window

Q When did you start planning and making the below arrangements for your trip to PNG?



Share of Respondents

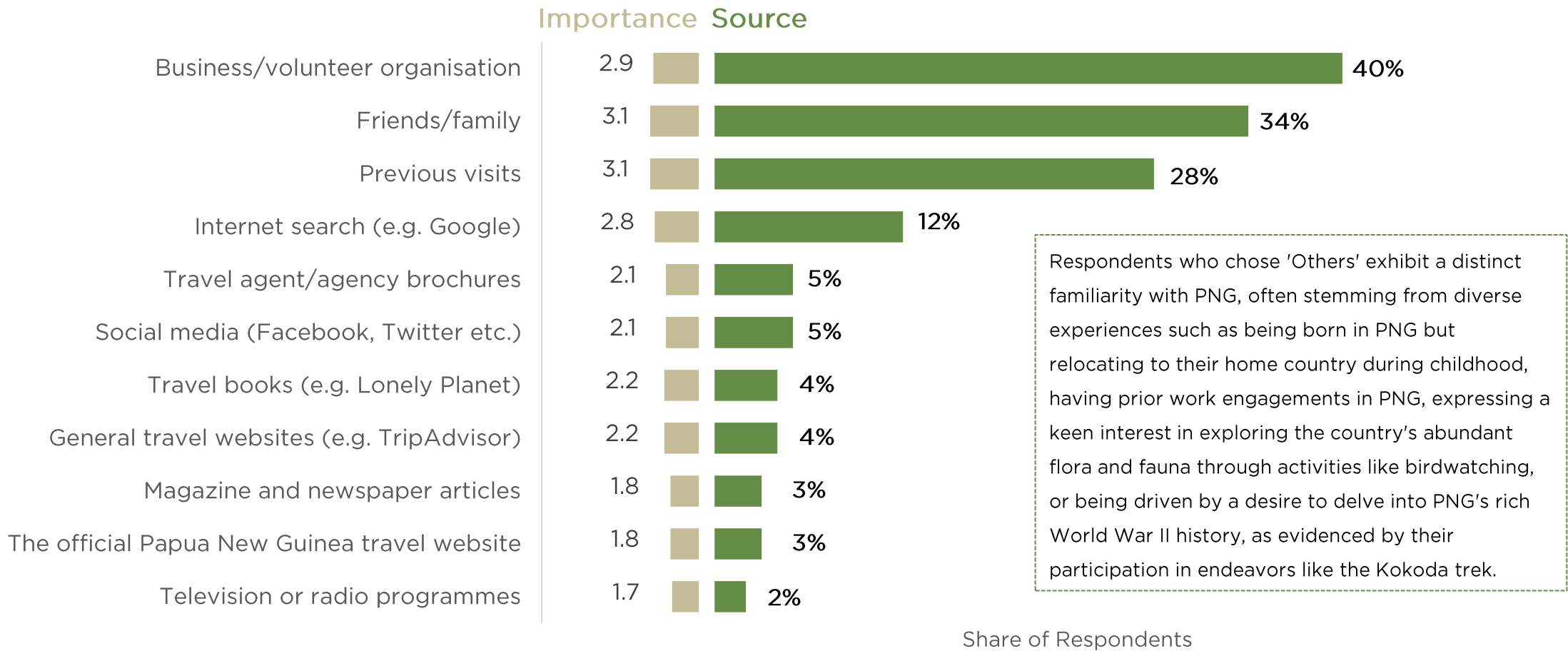
Note: The "Did not do" category was overwhelmingly predominant, making other categories appear relatively small. To clarify, frequency analysis was conducted twice: once including and once excluding this category. The second analysis, excluding the "Did not do" category, ensures that the remaining data totals add up to 100%, offering a clearer view of the proportions of the other categories.

Source of Information

Scale: 1=extremely unimportant to 5=extremely important

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

Q How important was the information source?

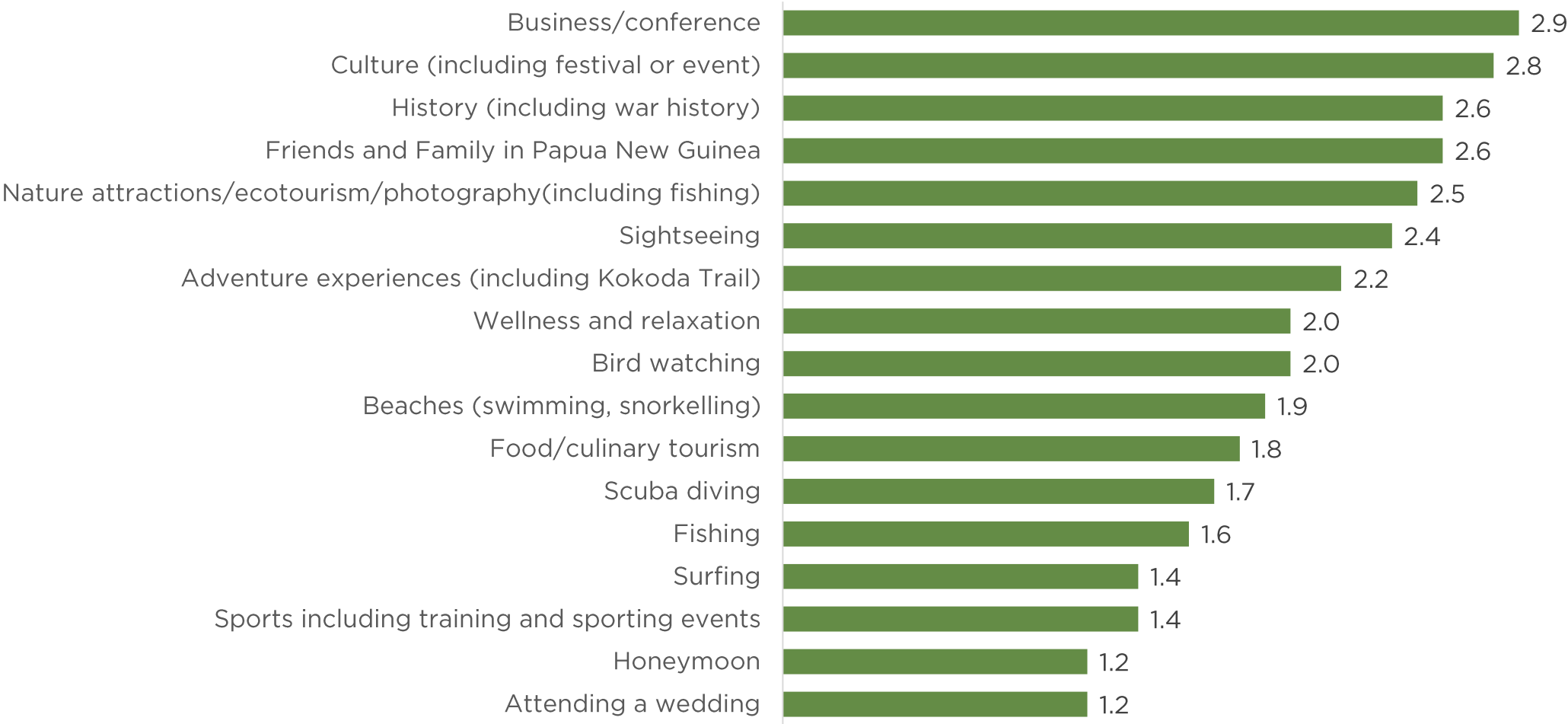


Note: Totals may not add up to 100% due to multiple responses. Ratings are shown with up to 1 decimal place to accurately reflect differences. Rounding could obscure important variations.

Influential Factors in Choosing PNG

Scale: 1=Not influential at all to 5=very influential

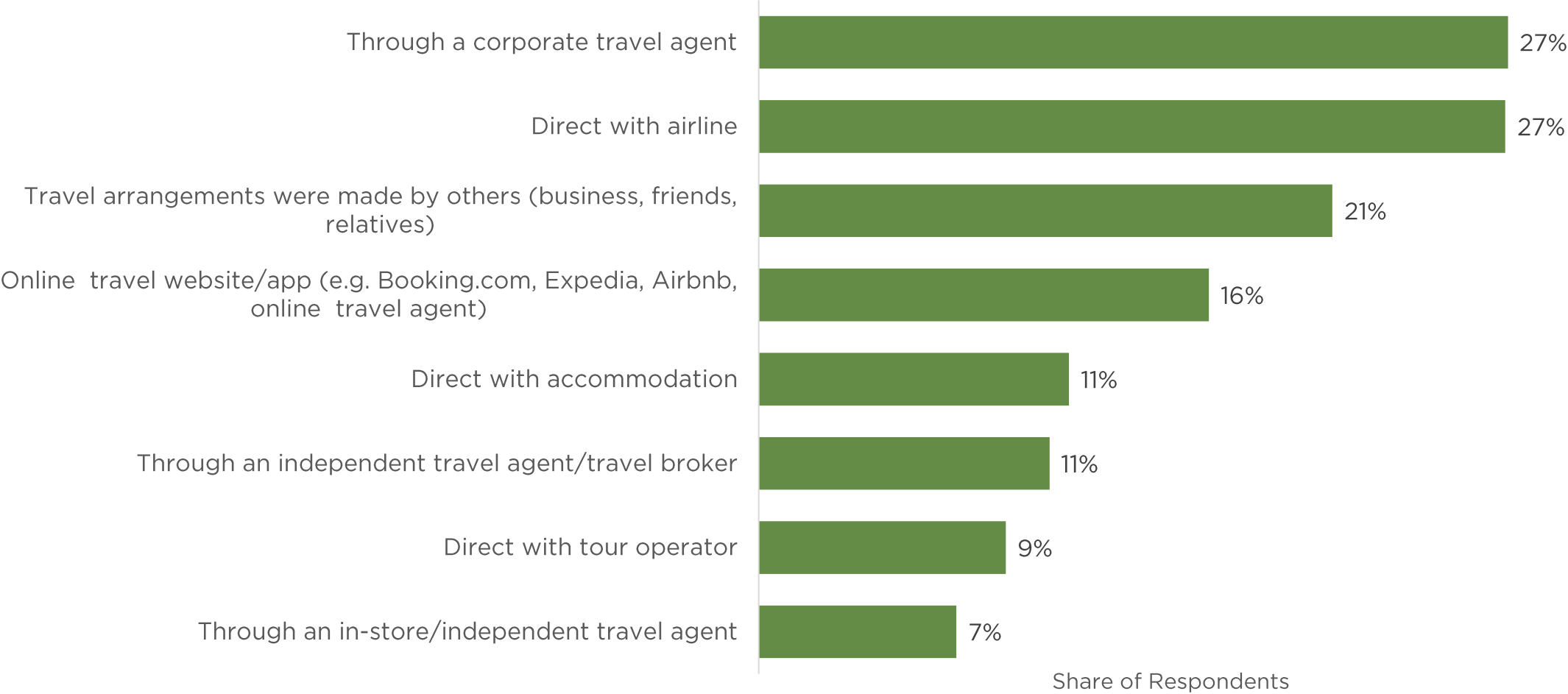
Q How influential were the following factors?



Note: Ratings are shown with up to 1 decimal place to accurately reflect differences. Rounding could obscure important variations.

Methods of Travel Bookings

Q How did you purchase your travel to PNG?



Note: Totals may not add up to 100% due to multiple responses.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact

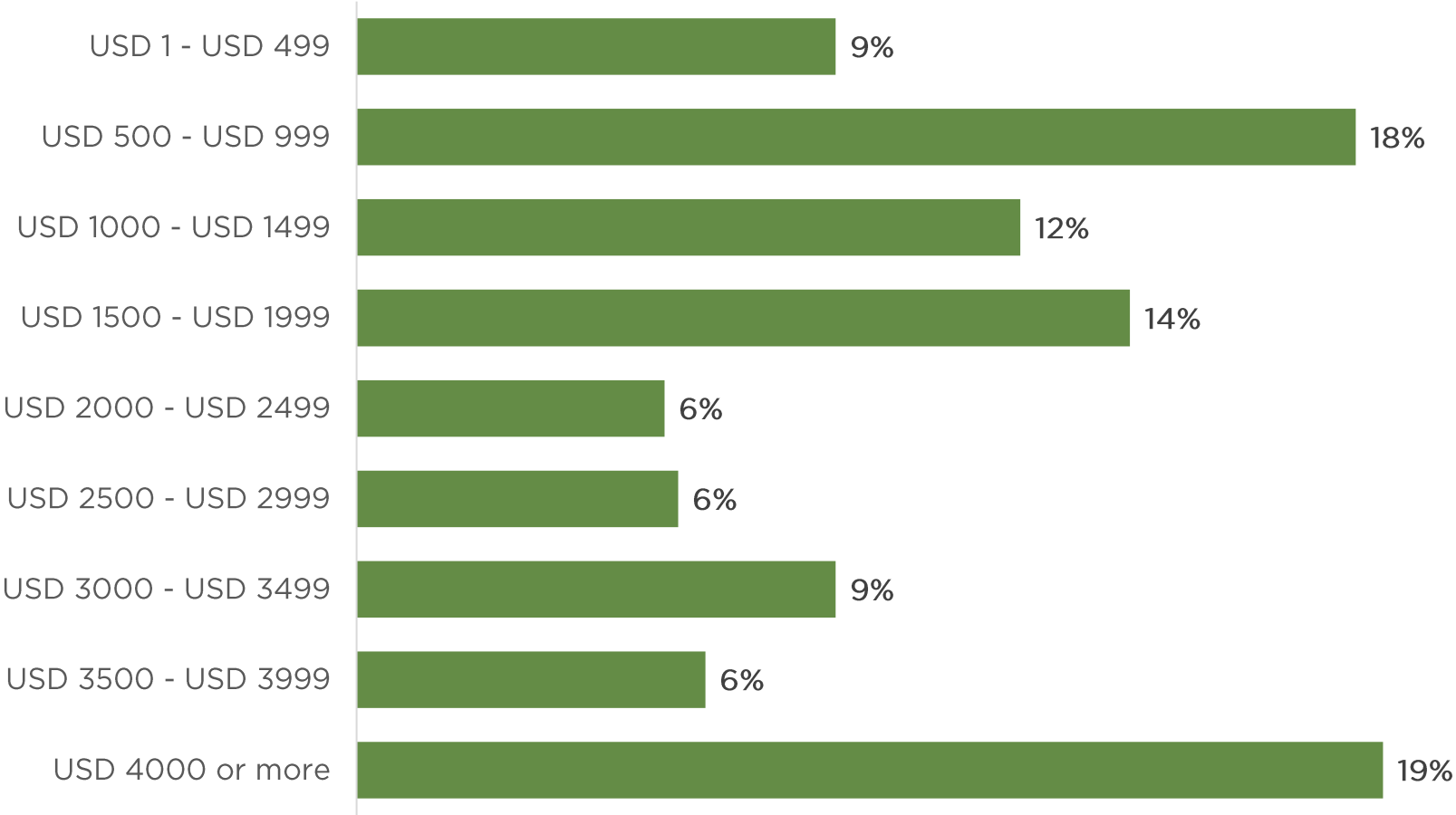


Visitor
Satisfaction

Prepaid expenditure per person

Q How much did you pay prior to your arrival?

Share of Respondents



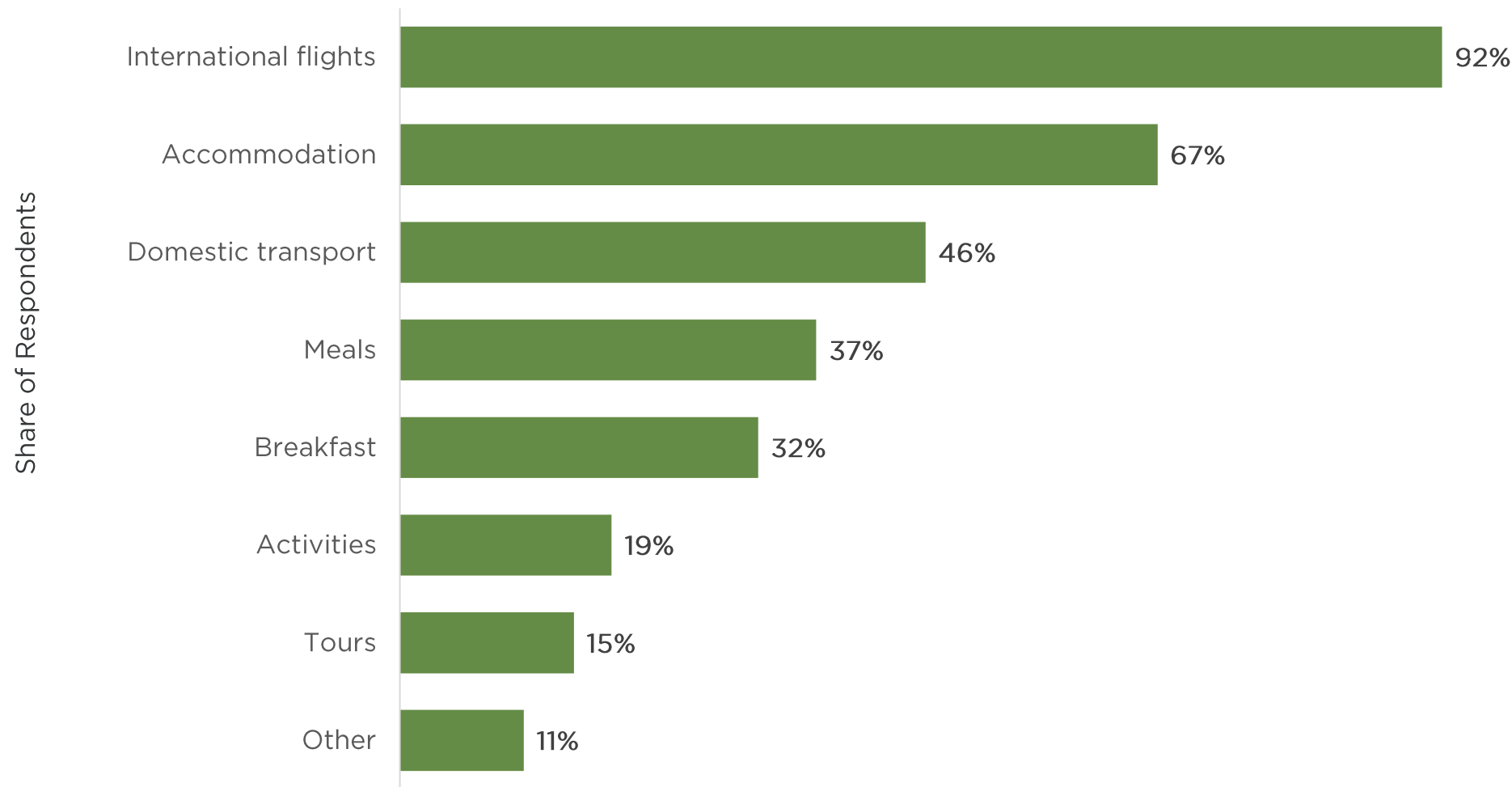
Avg. prepaid spend
USD 2,286

Avg. prepaid spend
PGK 8,520

Note: The average exchange rate to PGK and USD for January - June 2024 was applied.

Prepaid items

Q What did your prepaid expenditure include?



Note: Totals may not add up to 100% due to multiple responses. Respondents may not necessarily prepay for all the listed items and may not necessarily know the cost breakdown of their prepaid packages

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	32	44	167
Food & Beverage	15	21	79
Domestic Travel	10	13	51
Retail	3	4	14
Souvenir	10	15	54
Tour	4	6	22
Local Transport	14	19	72
Other	11	15	59
Internet & Service	2	2	8
TOTAL	100	139	525

Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures and can be used to estimate the total economic impact, through extrapolating to the total number of visitor arrivals during the surveyed period.

Economic Impact - Per Person and Total

	Visitor Expenditure Per Person & Total	
	USD	PGK
Average Spend Prior to arrival		
Per Person Per Trip	2,286	8,520
Flowing into local economy rate	estimated 65%	
Per Person Per Trip	1,486	5,538
Per Person per Day	127	474

Average Local Spend		
Length of Stay (nights)	mean 11.7 nights	
Per Person Per Trip	1,620	6,136
Per Person per Day	139	525

Total Economic Impact-Per Trip	3,106	11,674
Total Economic Impact-Per Day	266	999

Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures and can be used to estimate the total economic impact, through extrapolating to the total number of visitor arrivals during the surveyed period.

JAN – JUN 2023

USD 107 MILLION

FROM 54,953 VISITORS



PREPAID
EXPENDITURE



IN-COUNTRY
SPEND

\$2,942

Prepaid per visitor per trip

\$67

In-country spend per day

65%

Flowing into
local economy
rate



X 11 nights
Average length of
stay

\$1,912

Prepaid per visitor per trip

\$737

In-country spend per trip



ECONOMIC
IMPACT

\$2,649 per visitor per trip

\$242 per visitor per day

JAN – JUN 2024

USD 150 MILLION

FROM 48,478 VISITORS ▼



PREPAID
EXPENDITURE



IN-COUNTRY
SPEND

\$2,286 ▼

Prepaid per visitor per trip

\$139 ▲

In-country spend per day

65%

Flowing into
local economy
rate



X 11.7 nights ▲
Average length of
stay

\$1,486 ▼

Prepaid per visitor per trip

\$1,620 ▲

In-country spend per trip



ECONOMIC
IMPACT

\$3,106 per visitor per trip ▲

\$266 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

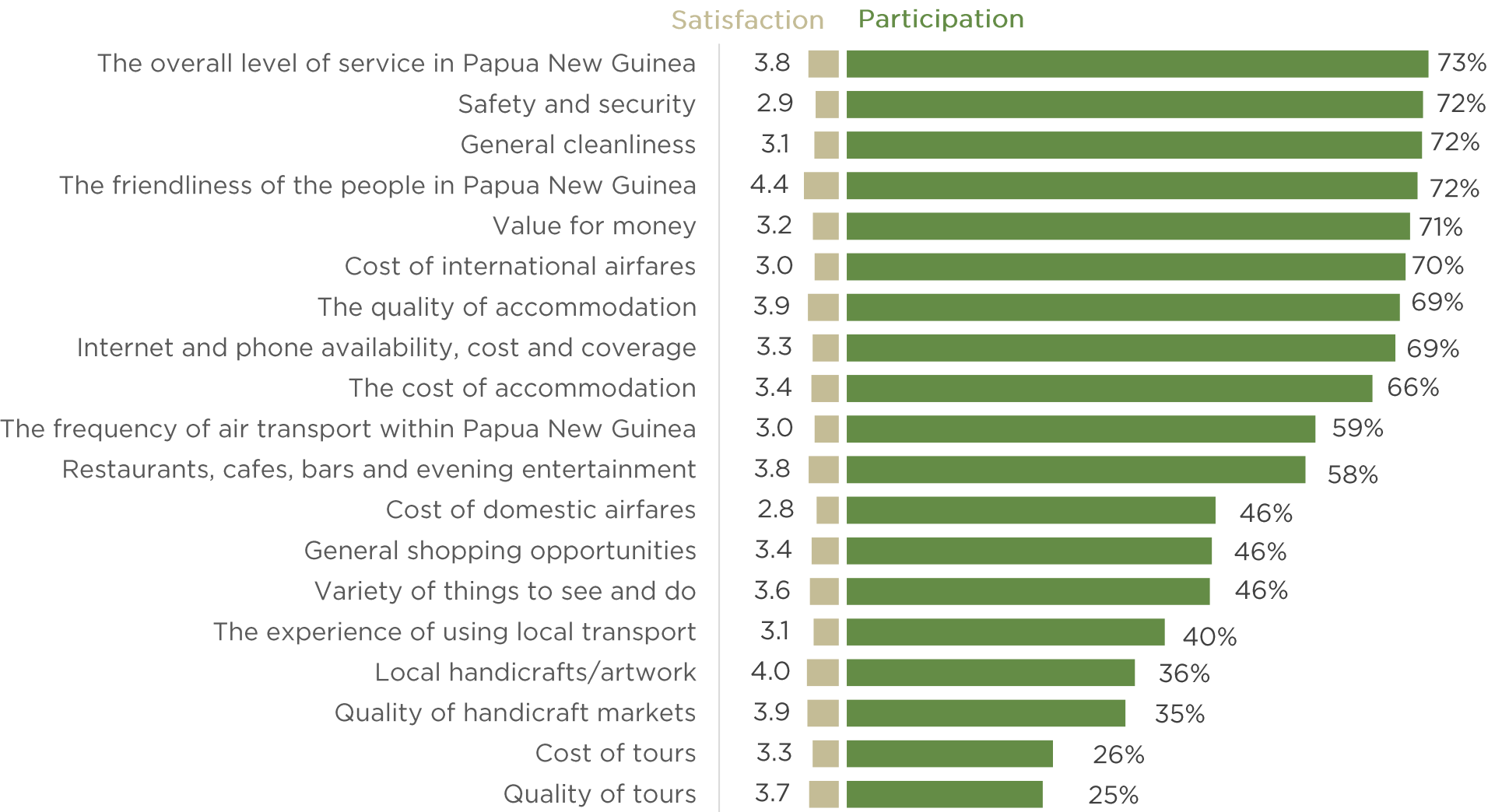


Visitor
Satisfaction

Satisfaction with Travel Experience

Scale: 1=very dissatisfied to 5=very satisfied

Q How satisfied were you with the following?

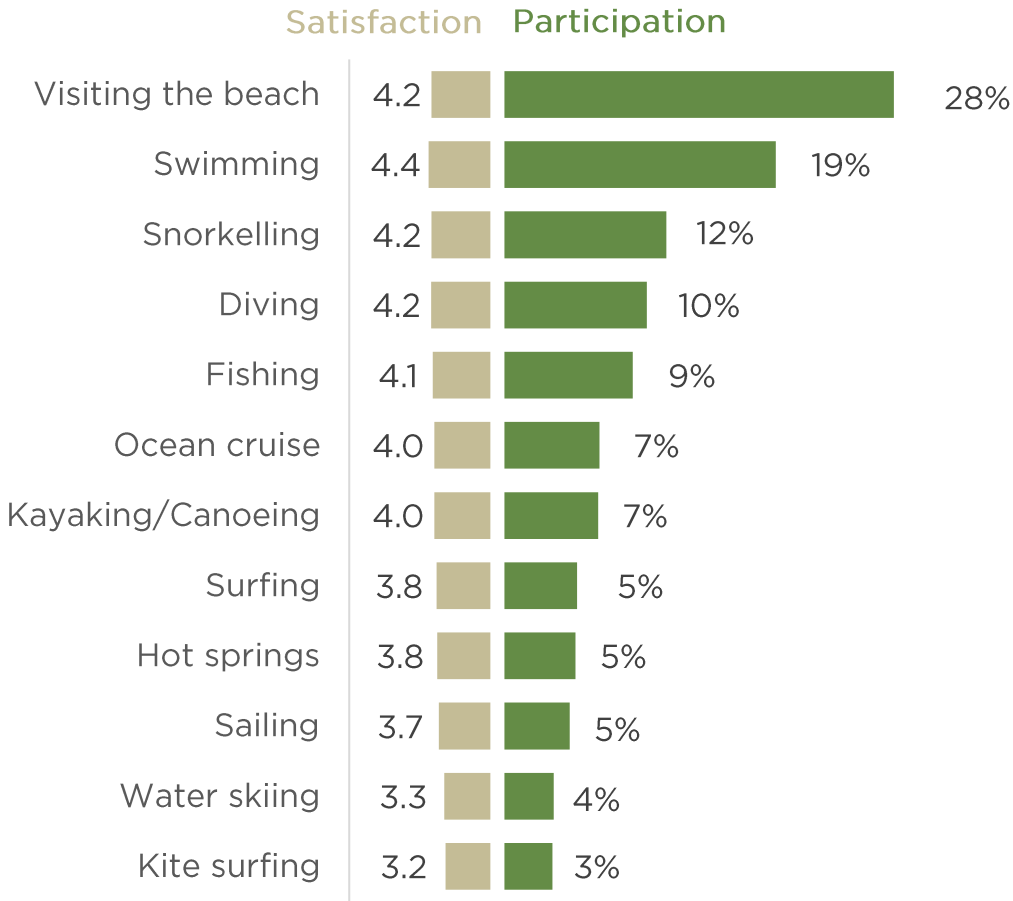


Note: Totals may not add up to 100% due to multiple responses.

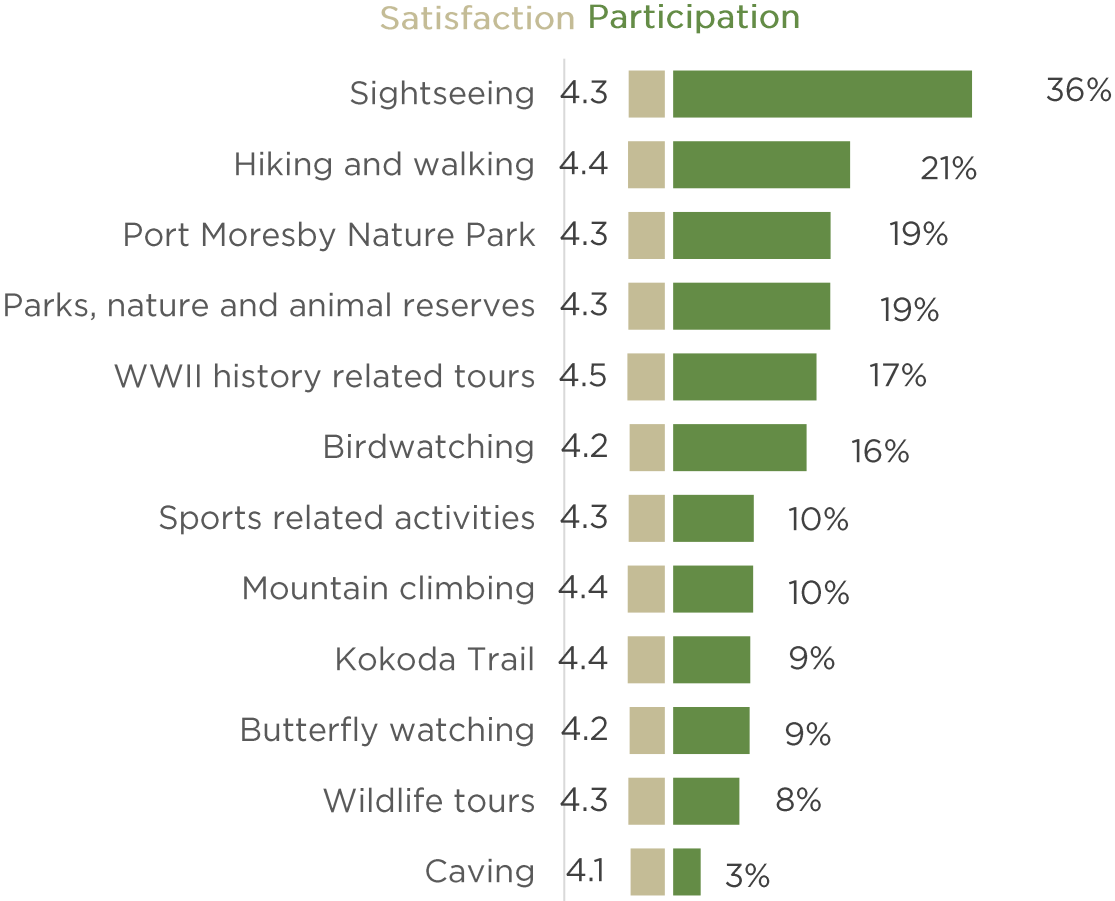
Satisfaction with Activities

Q How satisfied were you with the following?

Water-based activities



Land-based activities

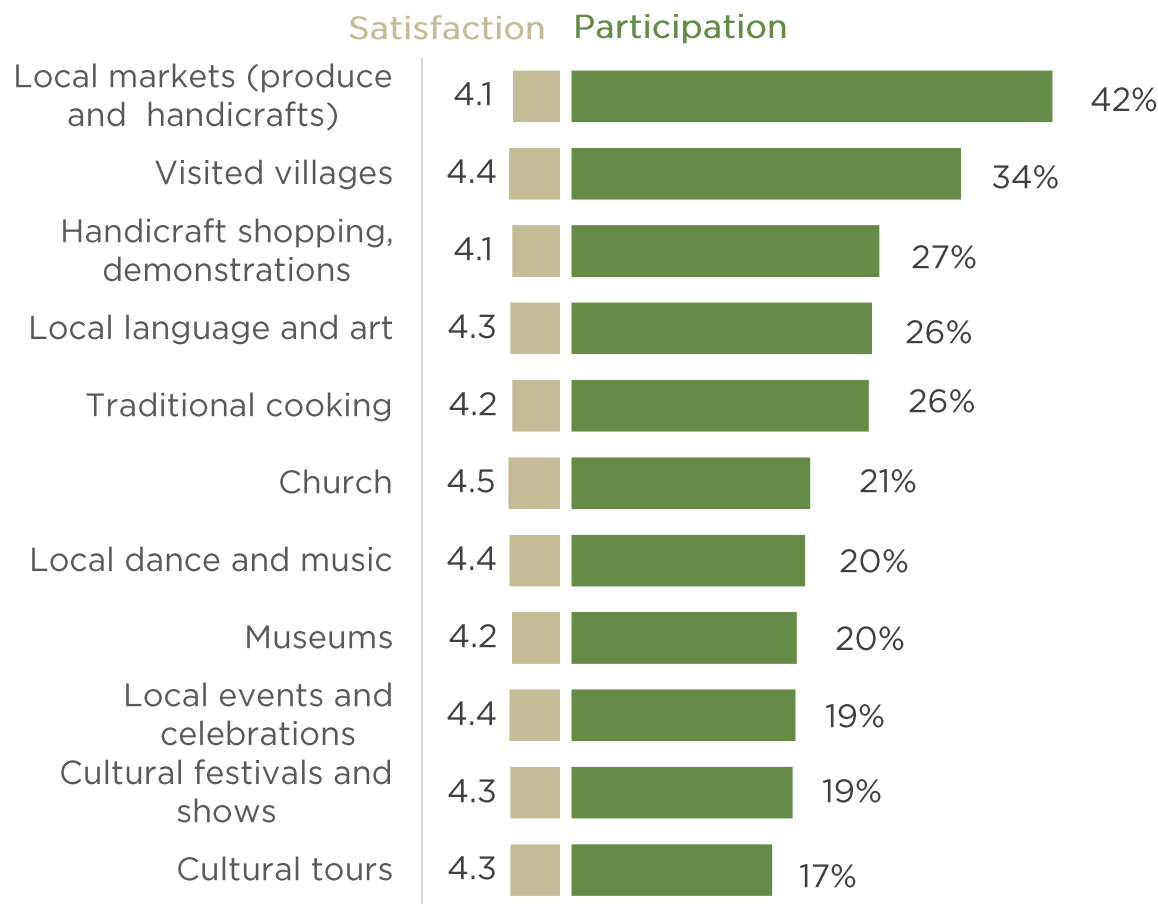


Scale: 1=very dissatisfied to 5=very satisfied

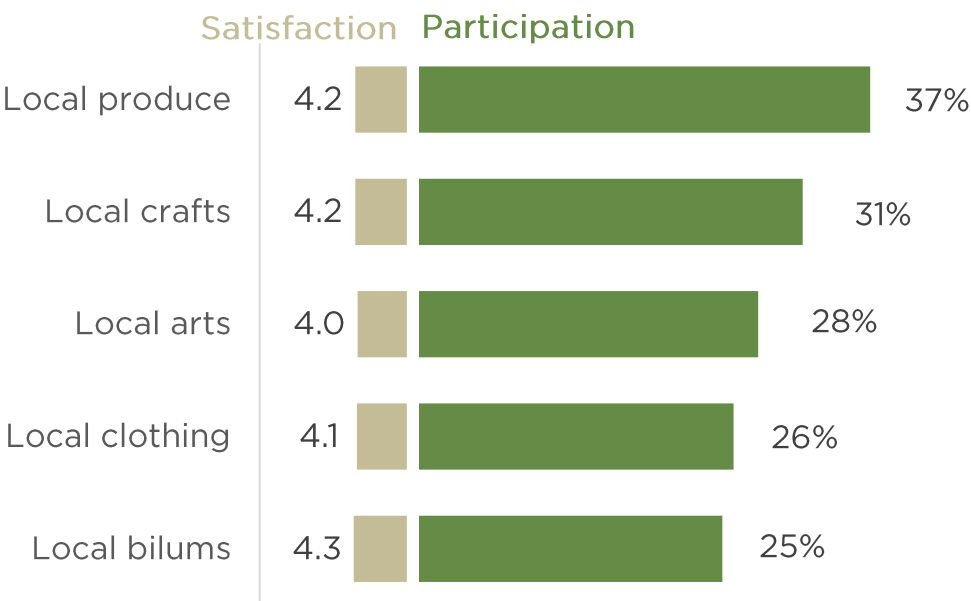
Satisfaction with Activities

Q How satisfied were you with the following?

Cultural activities



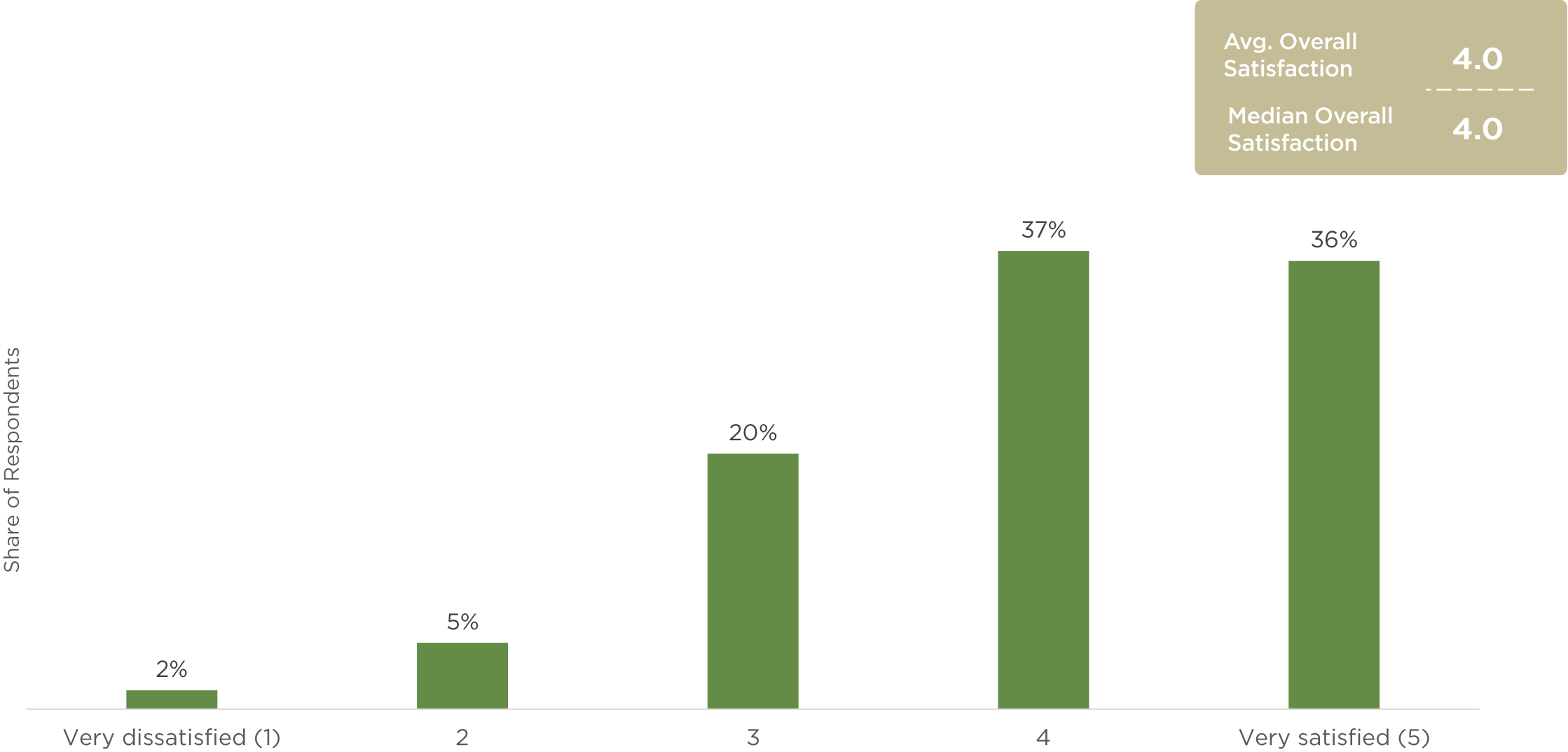
Shopping activities



Scale: 1=very dissatisfied to 5=very satisfied

Visitor Overall Satisfaction

Q How satisfied were you with your overall experience of PNG?



Note: The mean overall satisfaction rating is 3.9 and the median rating is 4. The median shows that 50% of respondents have an overall satisfaction rating of 4 and above

Most Appealing Aspects of PNG

Q What did you find most appealing about PNG?

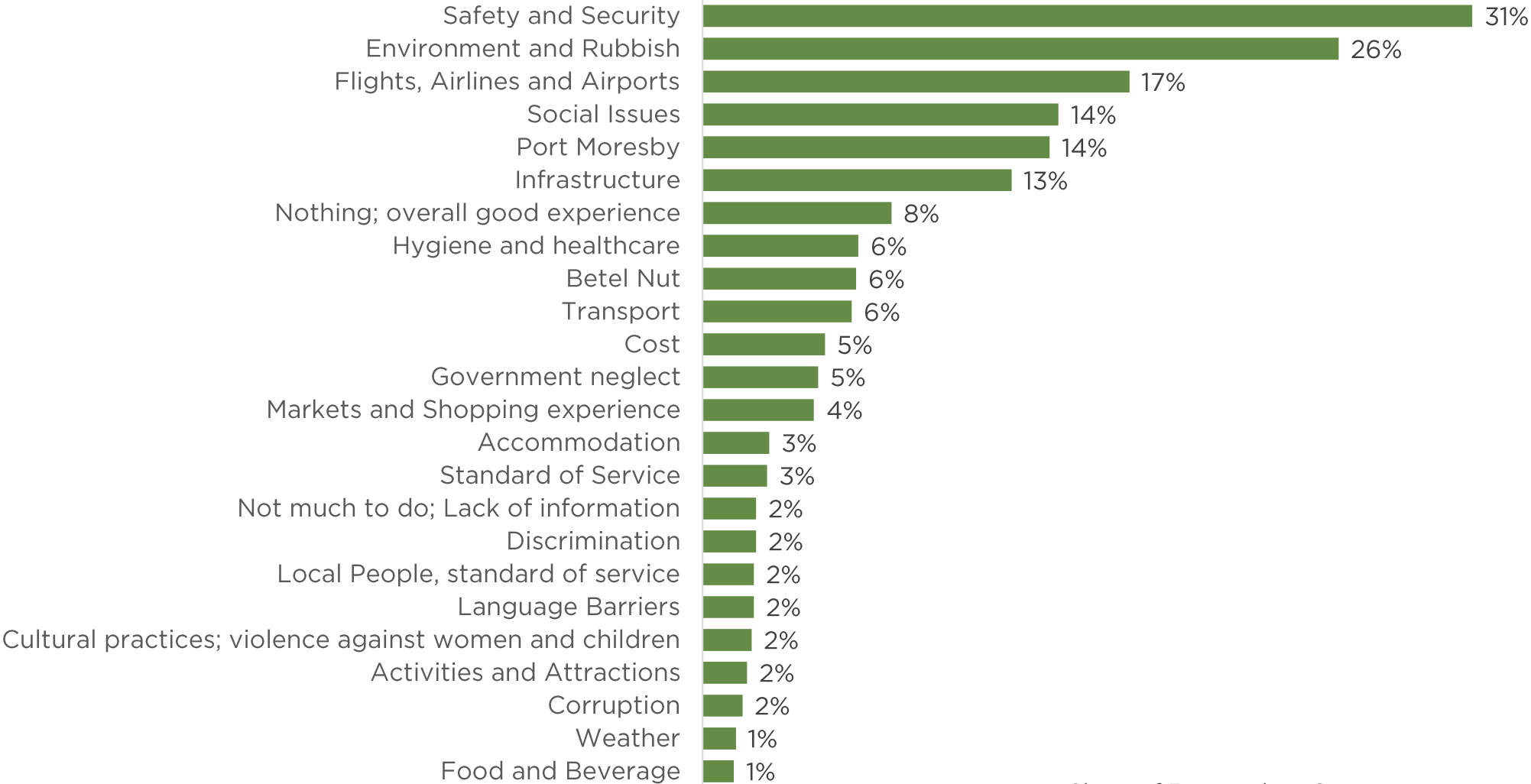


Share of Respondent Comments

Note: Total response N=1,149. Multiple response analysis, so total does not add up to 100%

Least Appealing Aspects of PNG

Q What did you find least appealing about PNG?



Share of Respondent Comments

Note: Total response N=1,112. Multiple response analysis, so total does not add up to 100%

Quotes for Least Appealing Aspects of PNG

- + The filthy roadsides at New Britain. Hoskins to Kimbe.
- + Security and inability to explore PoM at night
- + Primary roads in need of repair
- + Security especially for women. Rubbish everywhere.
- + Security especially in POM
- + internet speed
- + General feeling of unrest/unease within the populace. We had to be driven around by private security.
- + Lack of relationship with the local community and the resort
- + The pollution of Port Moresby
- + Hotel price was high
- + The ONLY downside, and it is minor, was the cleanliness in one of the hotels we stayed at - it was musty and dampy, with some cockroaches: not a problem in itself, but given the price of the hotel (USD 134/night), we were expecting something a bit better. VERY minor - literally the only thing I could think of that was not perfect.
- + Long waiting times clearing customs.
- + Enga province tribal bloodshed POM riots Appalling roads in Madang
- + Unreliable power and internet on Bougainville. Also roads are substandard
- + Unreliable domestic flights. Multiple flights were cancelled last Minute



Suggestions for Improvement

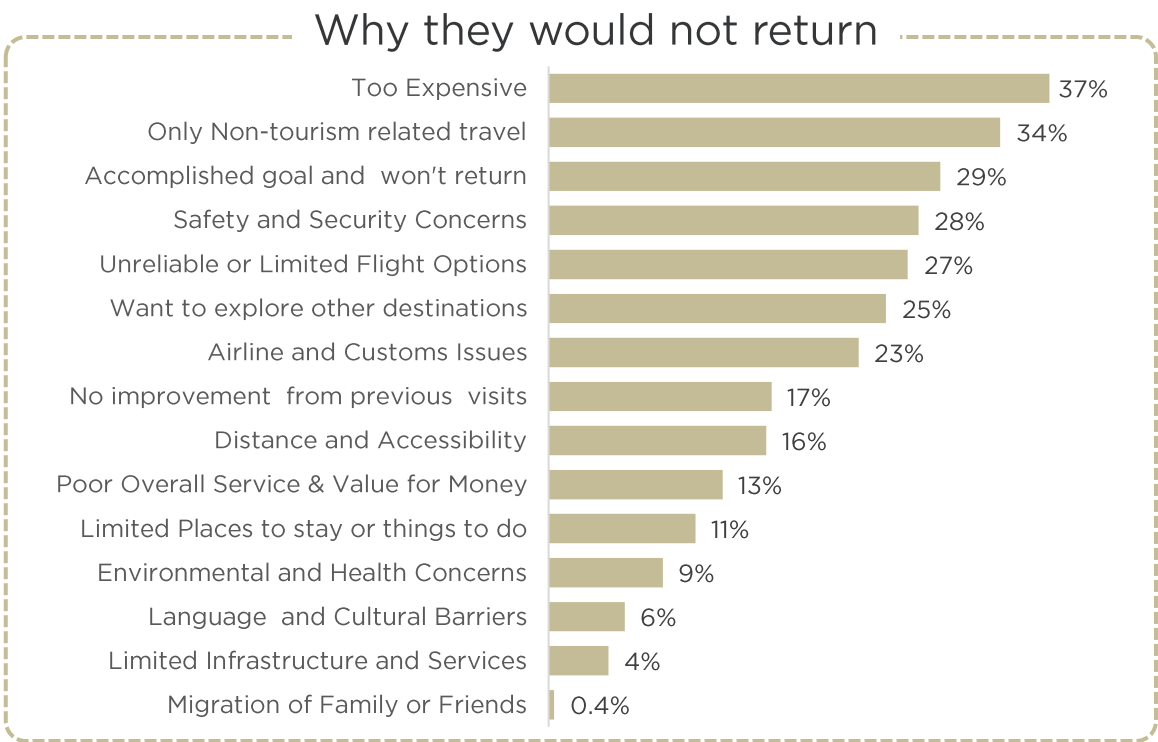
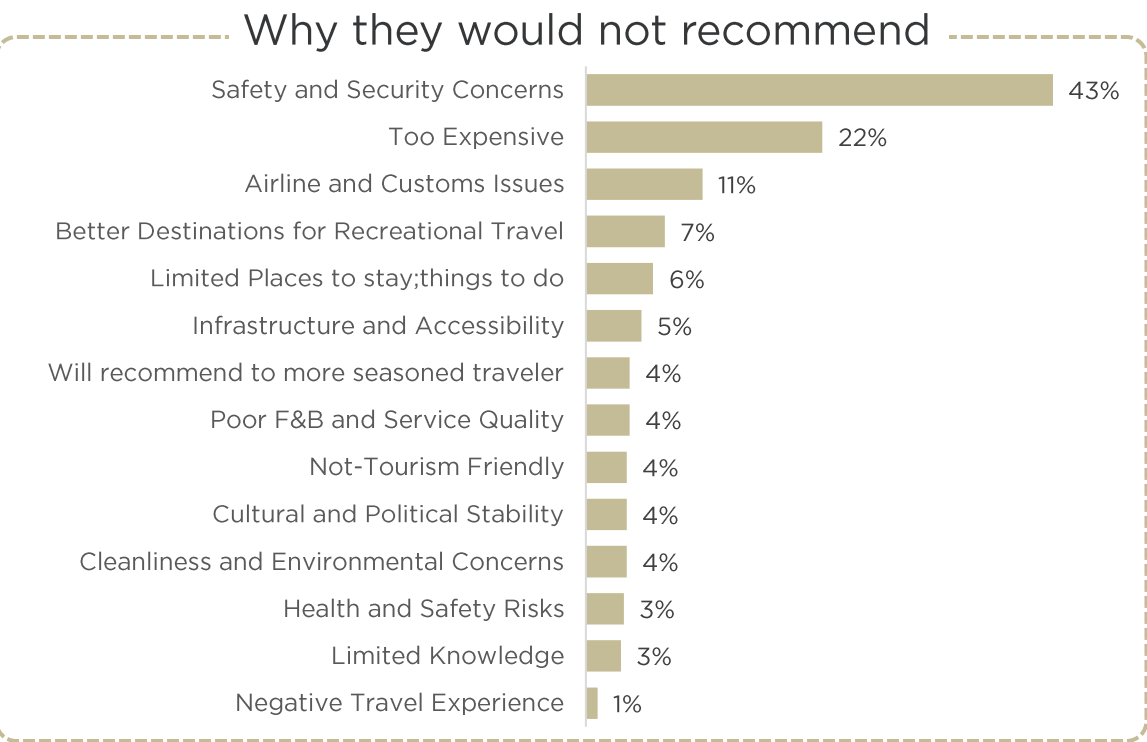
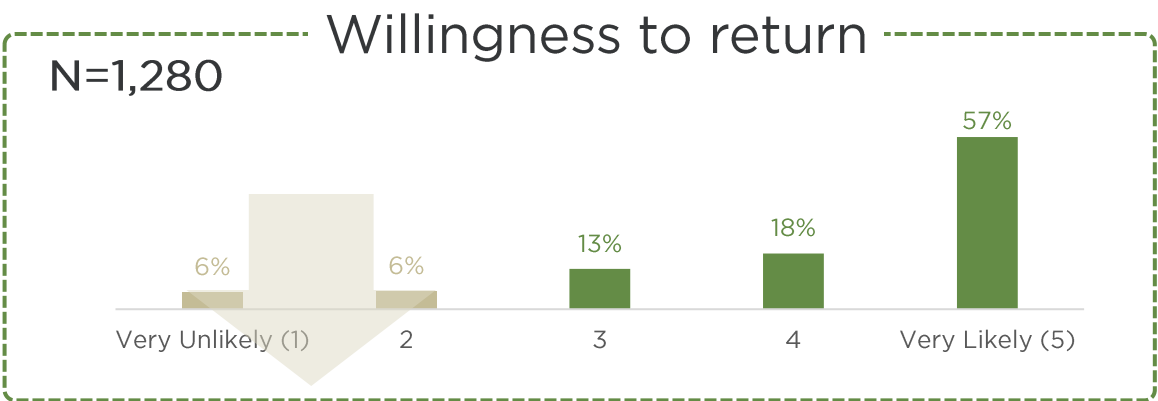
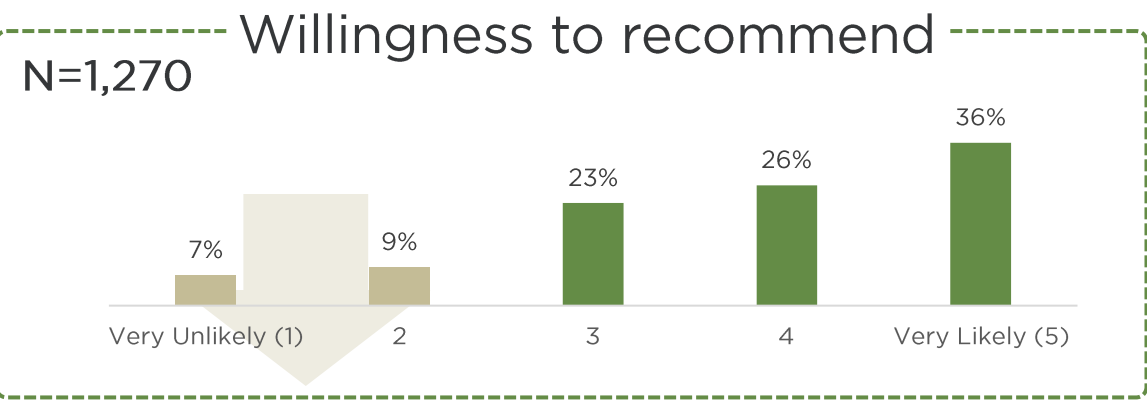
Q Is there anything that could have improved your visit to PNG?



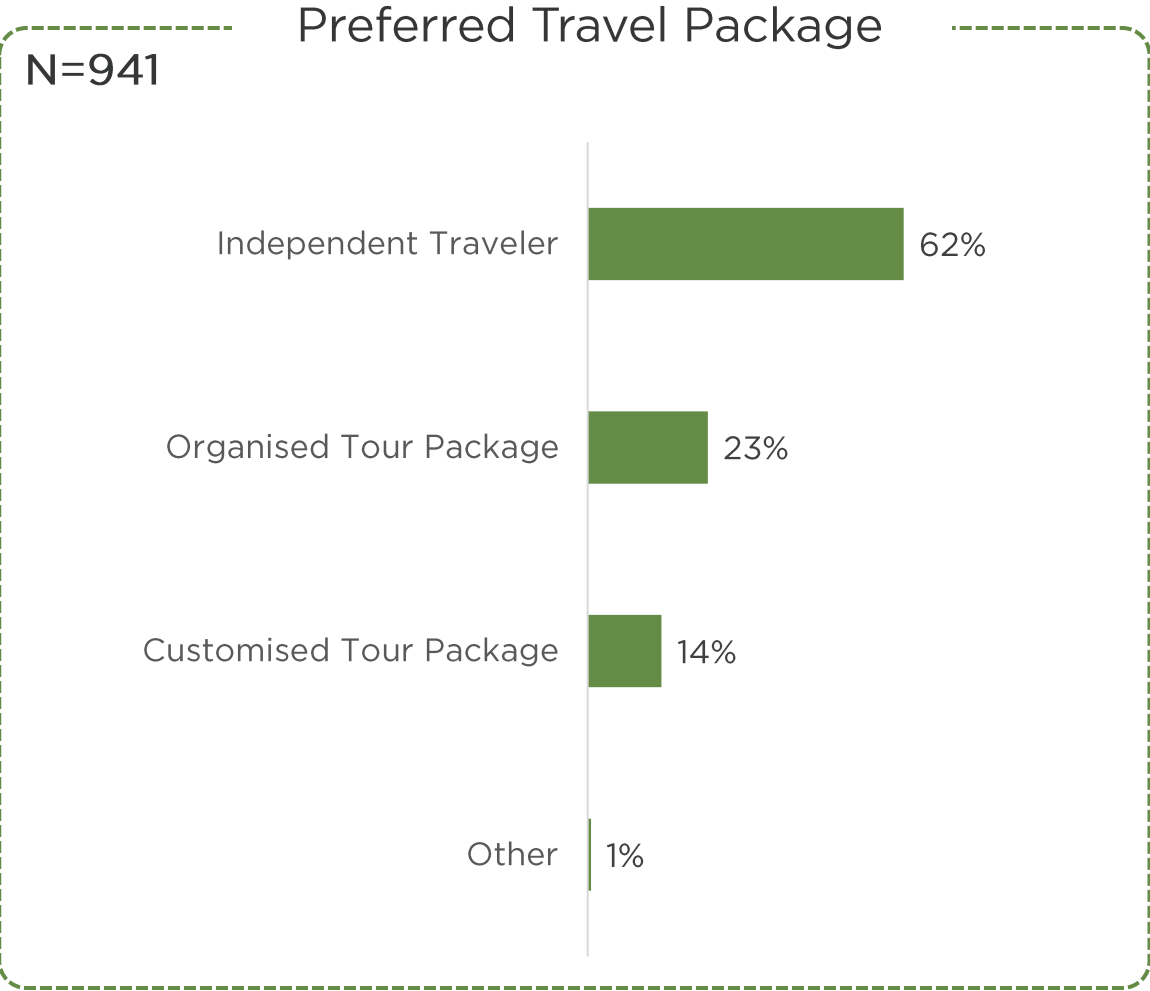
Share of Respondent Comments

Note: Total response N=632. Multiple response analysis, so total does not add up to 100%

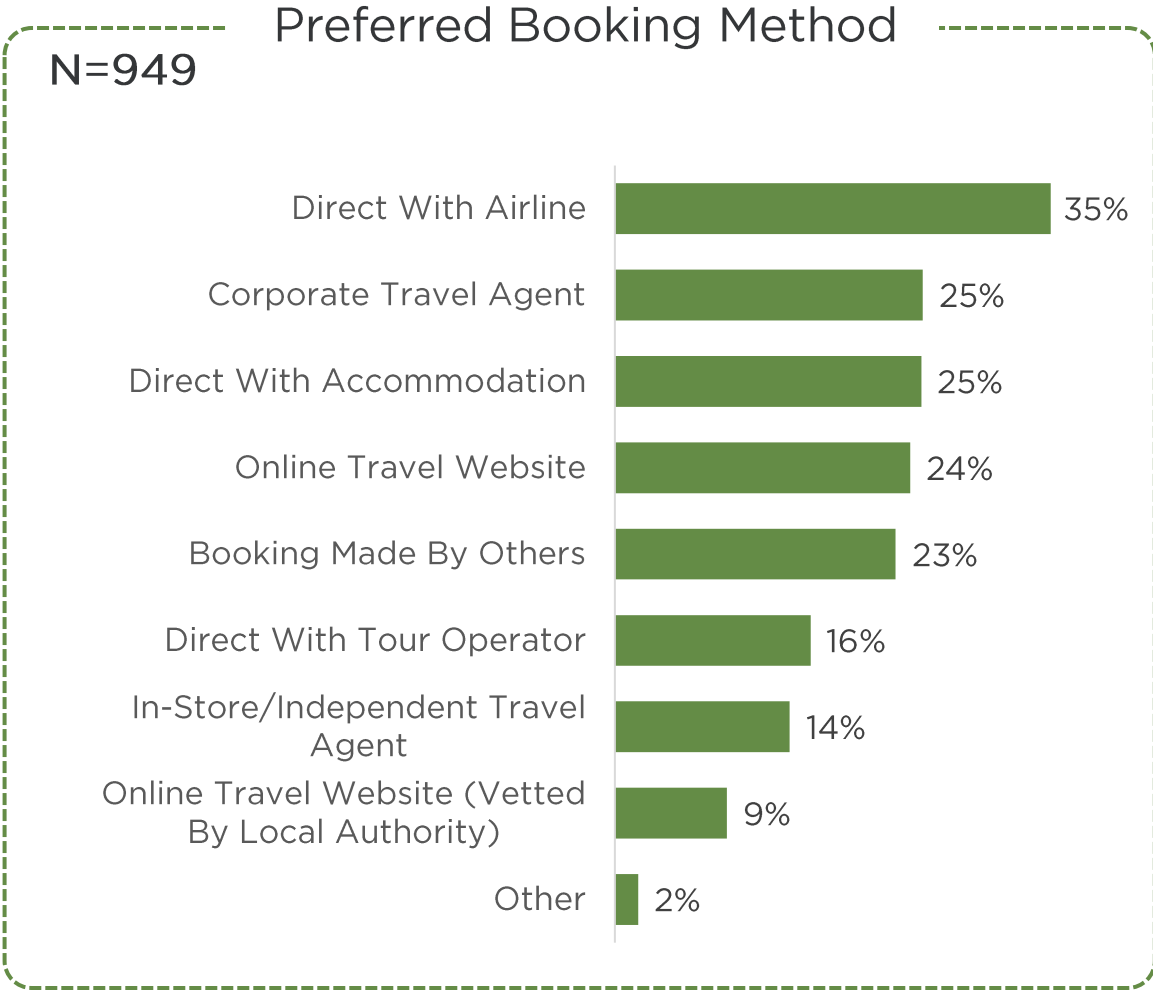
Future Travel Intentions



Willingness to Return – Next Trip to PNG



Respondents may not book directly with travel agents but often rely on their organization, employer, or family/friends to handle their travel arrangements. Business travel can involve both organized and independent elements



Despite concerns about direct airline bookings, most respondents still prefer this method for their next trip to PNG. However, there is a tendency to explore other options for the best deal, as evidenced by the broad distribution of booking preferences.



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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