

PAPUA NEW GUINEA

International Visitor Survey Report
January - December 2024

SOLO



Photo Credit: David Kirkland

Acknowledgements

- ❖ The Pacific Tourism Organisation (SPTO) expresses its gratitude to all contributors to this report on IVS data from January to December 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 December 2024, analyzed 3,701 responses out of 3,775 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 86,074.
- ❖ 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 86% of visitors indicated they would recommend PNG to others, and 89% expressed willingness to return.
- ❖ The average prepaid spend per visitor was USD 2,613, with an estimated 65% (USD 1,699) flowing into the local economy. In-country spending per visitor per trip averaged USD 1,385, with an average stay of 10.2 nights.
- ❖ This contributed to an *estimated** economic impact of USD 309 million from January to December 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 (air) visitor numbers of 110,223 for the January - December 2024 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 December 2024 is analyzed to understand the visitor experience and gain insights into tourism recovery in Papua New Guinea after the border reopening.
- ❖ In 2024, air visitor arrivals declined to 100,223 from 112,775 in the previous year, reflecting ongoing challenges in global travel demand and regional economic conditions. However, the estimated spend per visitor increased from USD 2,514 to USD 3,084, indicating a shift towards higher-value tourism.
- ❖ Even though the average length of stay for short-term visitors (1-29 days) decreased from 10.8 to 10.2 days, the estimated spend per visitor per day rose from USD 234 to USD 302, suggesting that visitors were spending more on experiences, accommodation, and activities despite shorter trips.
- ❖ 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 December 2024 period.

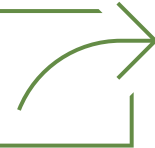
Disclaimer

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- ❖ The **survey instrument** used to collect data for the January to December 2024 period was similar, but not exact, to the survey instrument used in the January to December 2023 period. New questions were added, a handful of existing questions were removed, and the response options for some questions were altered.
- ❖ **Cruise Visitor Arrivals** – The IVS primarily captures air visitors, some of whom may join a cruise while in Papua New Guinea. However, it does not measure spending by visitors arriving directly by sea. A separate survey will be developed for cruise visitor expenditure.
- ❖ **N.B.** Our analysis uses IVS respondents, weighted with January to December 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 – December 2024)



15,377 TOTAL EMAILS SENT



3,701 RESPONSES ANALYSED

24%
CONVERSION RATE

Note: 3,775 responses were received. After data cleaning, 3,701 responses remained.

RESPONDENTS REPRESENT⁺



4,163 ADULTS



562 CHILDREN

5%*
OF ALL VISITORS IN THIS PERIOD

*Based on the Local Spend Question - "How many adults and children were included in your local expenditures?" *Calculated by dividing the total number of 'weighted' people reported in the Local Spend Question by the total actual arrivals to PNG from January to December 2024.

PNG International Visitor Survey

Snapshot January – December 2024

Country of residence



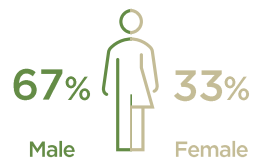
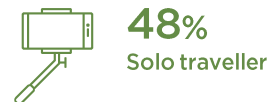
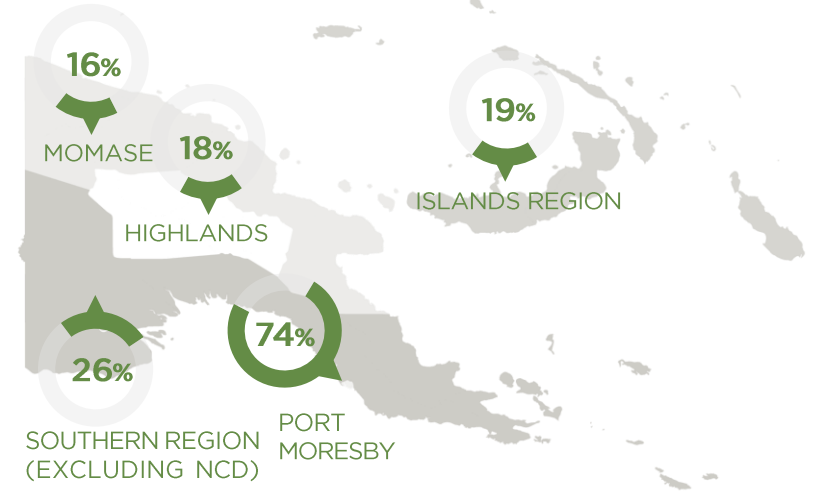
Purpose of visit



Most Participated Activities



Regions visited



Economic impact

USD 1,699
Avg. prepaid spend per person per trip

+


USD 1,385
Avg. local spend per person per trip

=

USD 3,084
Total Expenditure per person per trip

Note: The estimated flow-back rate into the PNG economy for prepaid spend is 65%. With an average prepaid spend of \$2,613 per person per trip, this equates to \$1,699.


Report Structure



Visitor Profile



Visitor Characteristics & Preferences



Information & Decision Making

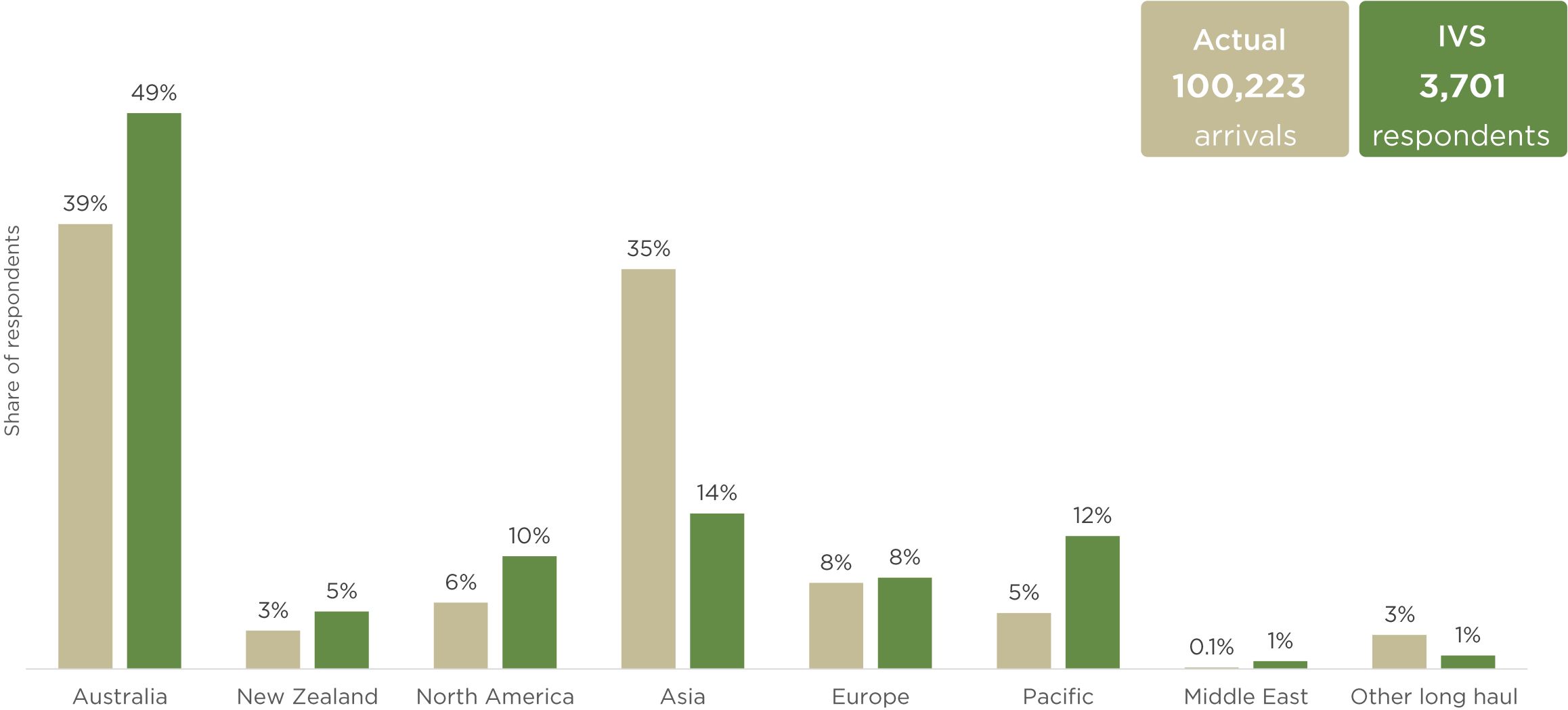


Visitor Spending & Impact



Visitor Satisfaction

Source Markets: IVS Respondents vs. Actual Arrival



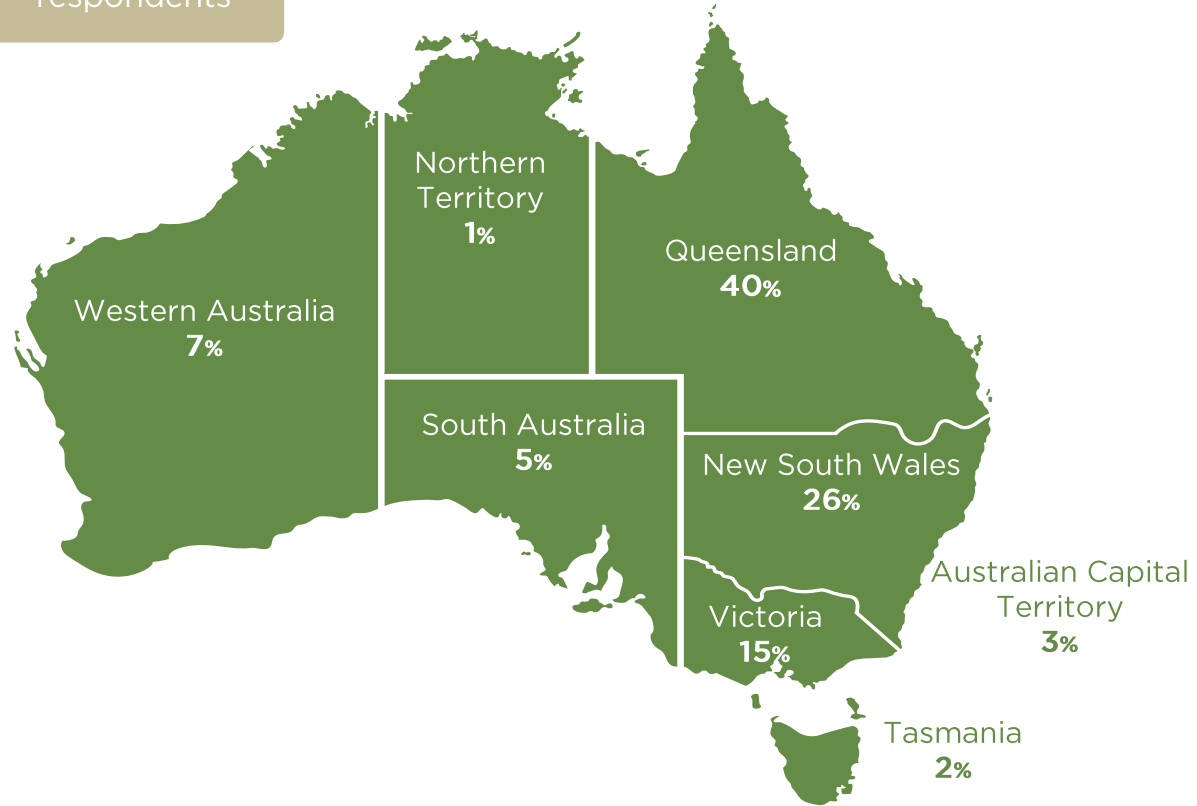
Note: The data presented is unweighted. To ensure a representative sample, weighting was applied to adjust for any undersampling or oversampling by source market.

Top Source Markets – Australia & New Zealand

1,823

Total
Australian
respondents

Respondents sample is unweighted

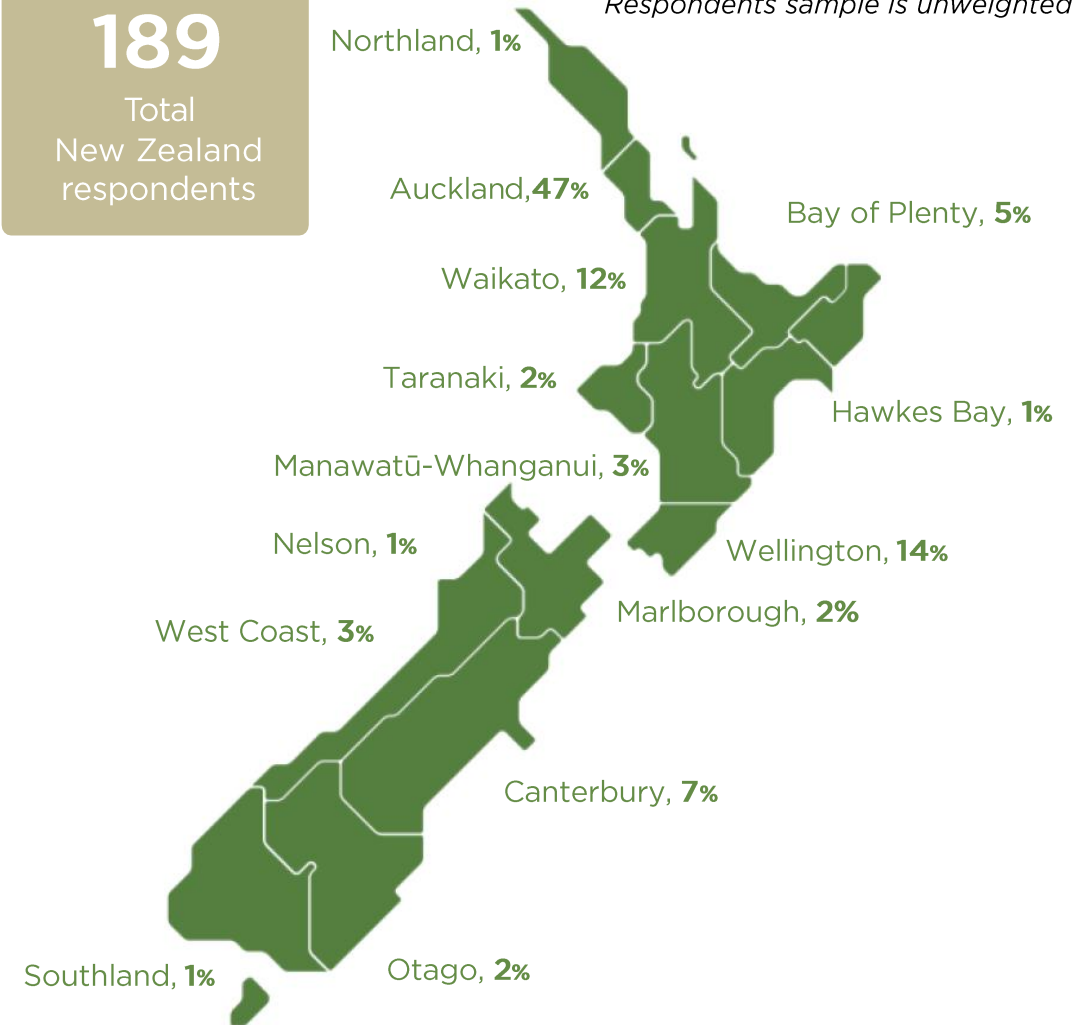


New South Wales, Queensland and Victoria make up **82%** of all Australian respondents

189

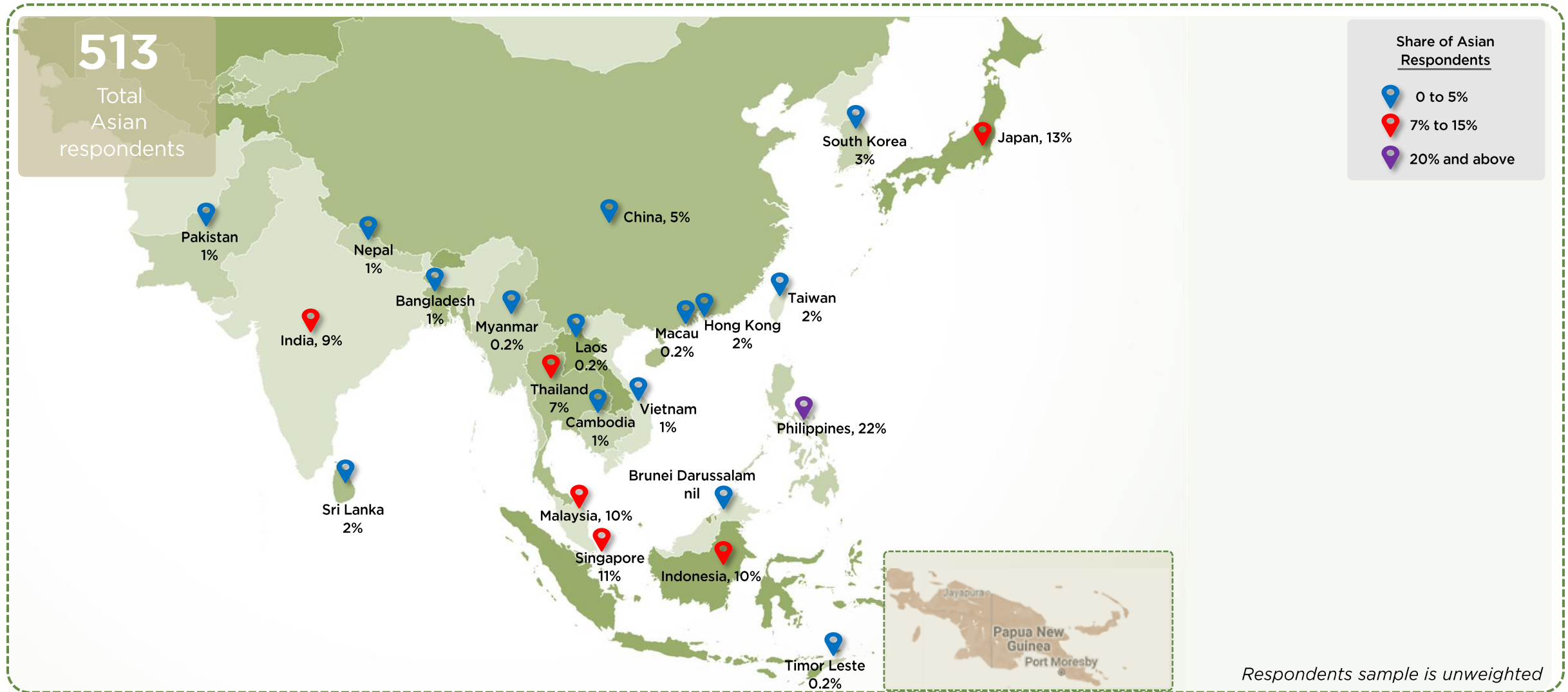
Total
New Zealand
respondents

Respondents sample is unweighted



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

Top Source Markets - Asia

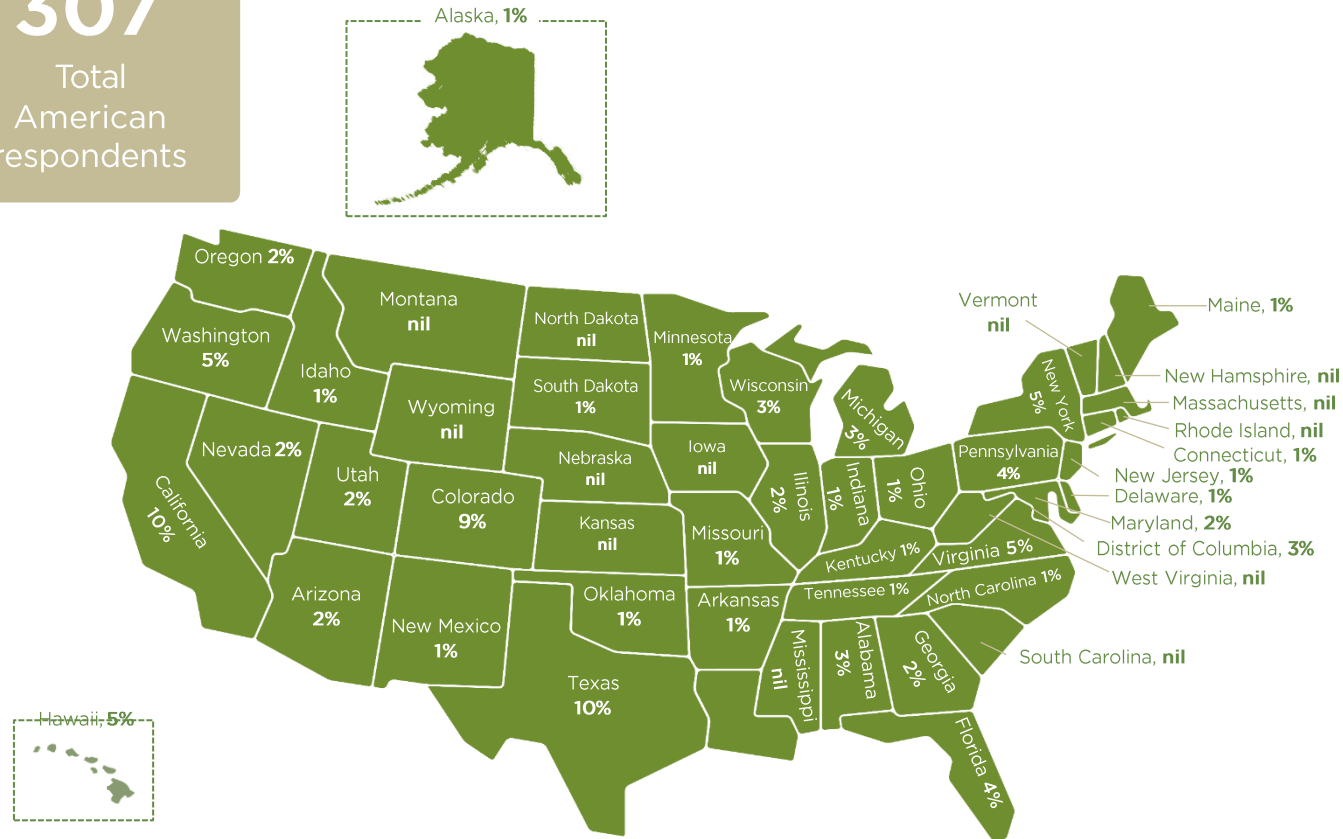


Top Source Markets – North America (USA & Canada)

307

Total American respondents

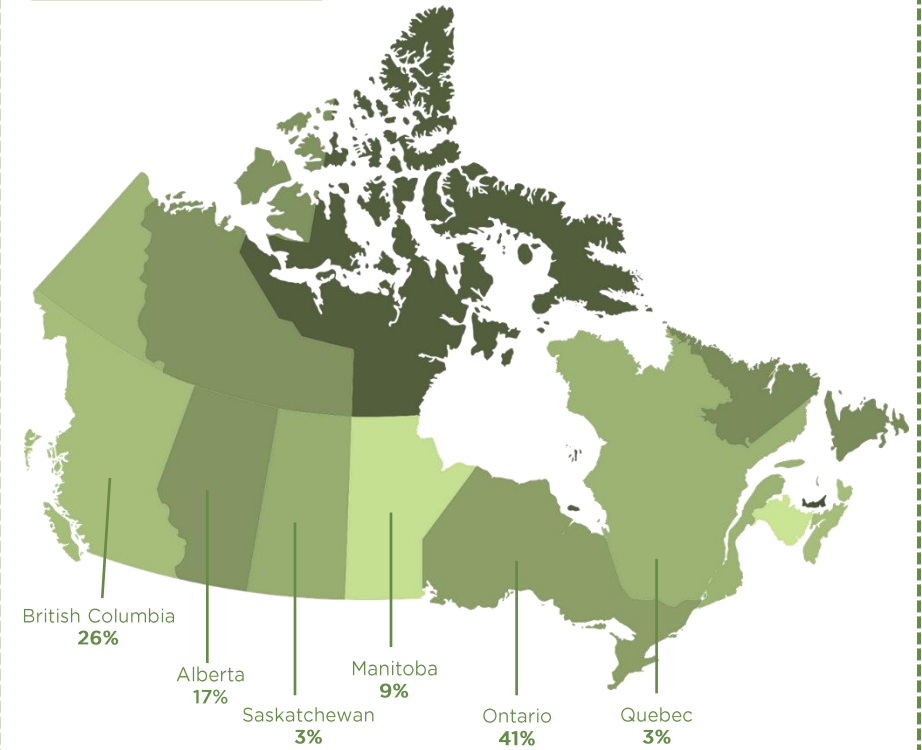
Respondents sample is unweighted



64

Total Canadian respondents

Respondents sample is unweighted



Respondents sample is unweighted

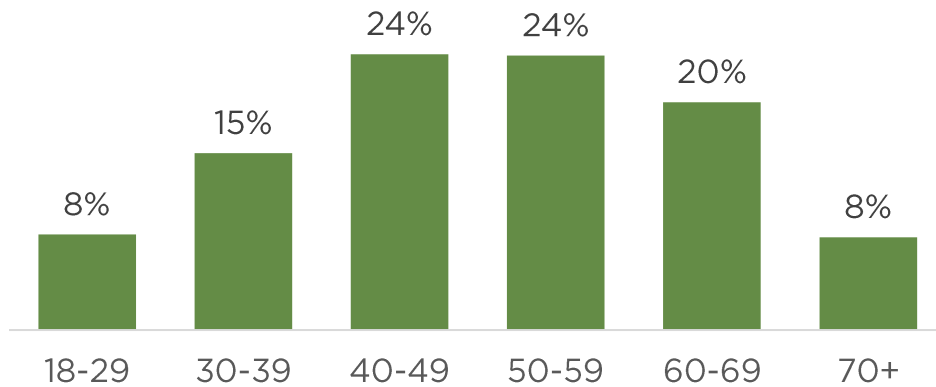
Respondents from 34 US states (including Hawaii and Alaska) visited PNG. No respondents from Connecticut, Delaware, Louisiana, Kansas, Nebraska, South Dakota, and Iowa participated. States with 'nil' percentages had no respondents.

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

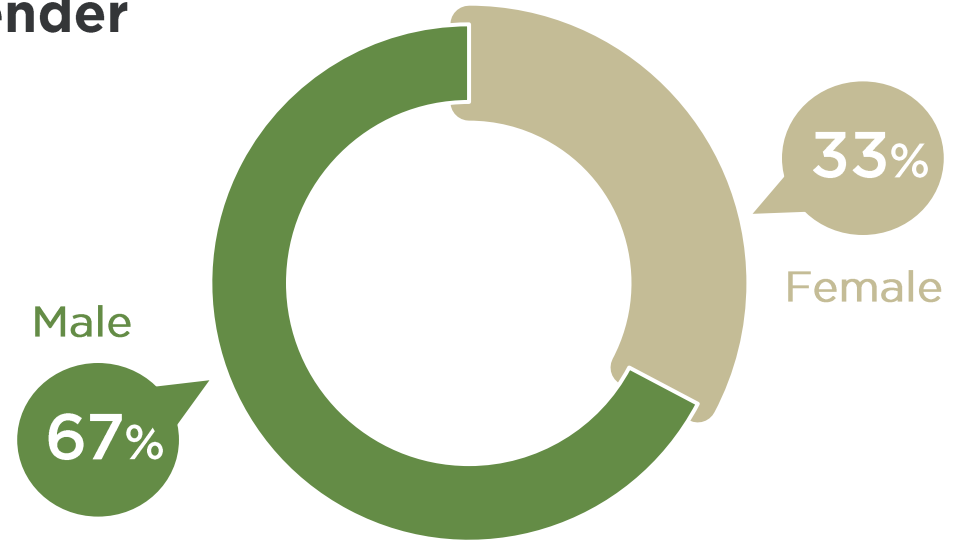
Respondent Demographics

Age

Avg. age group
40-59 years

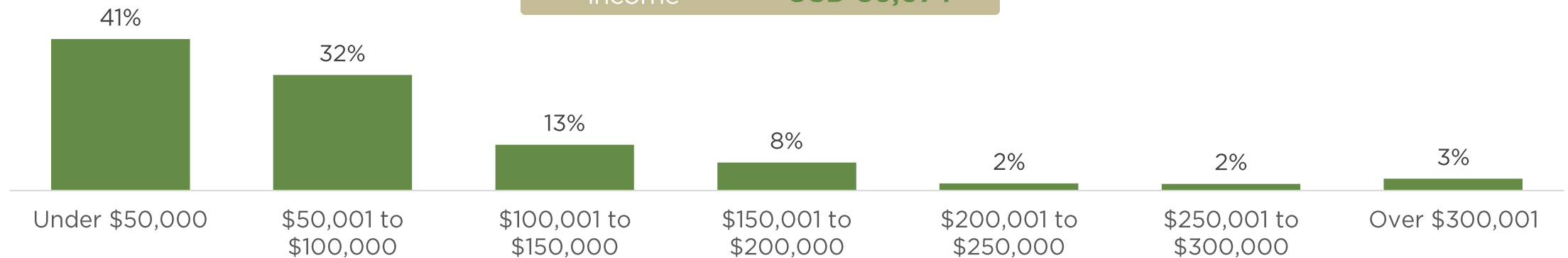


Gender



Annual Household Income

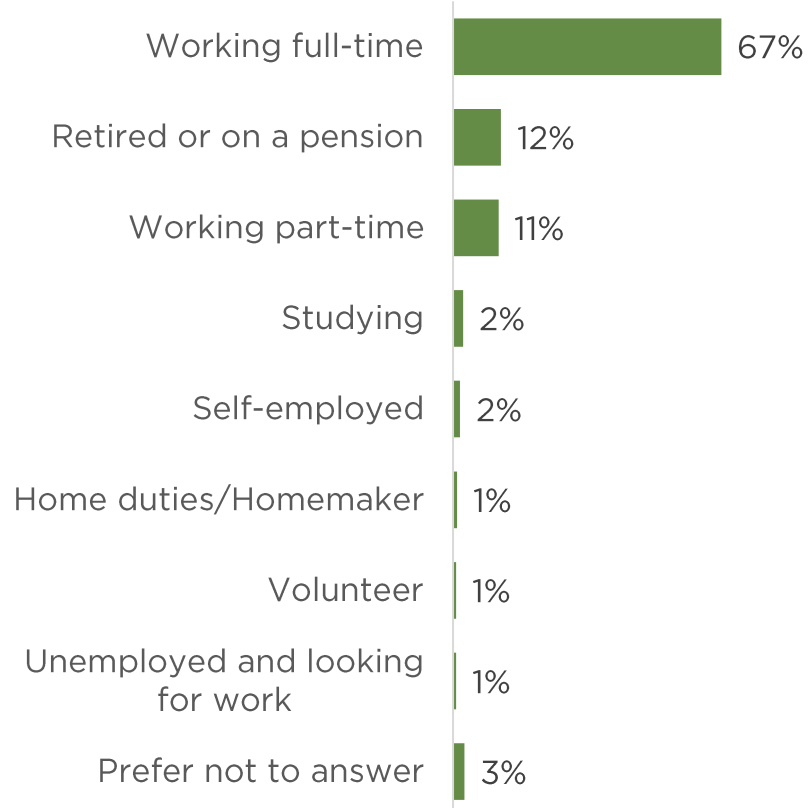
Avg. household income
PGK 333,849
USD 86,074



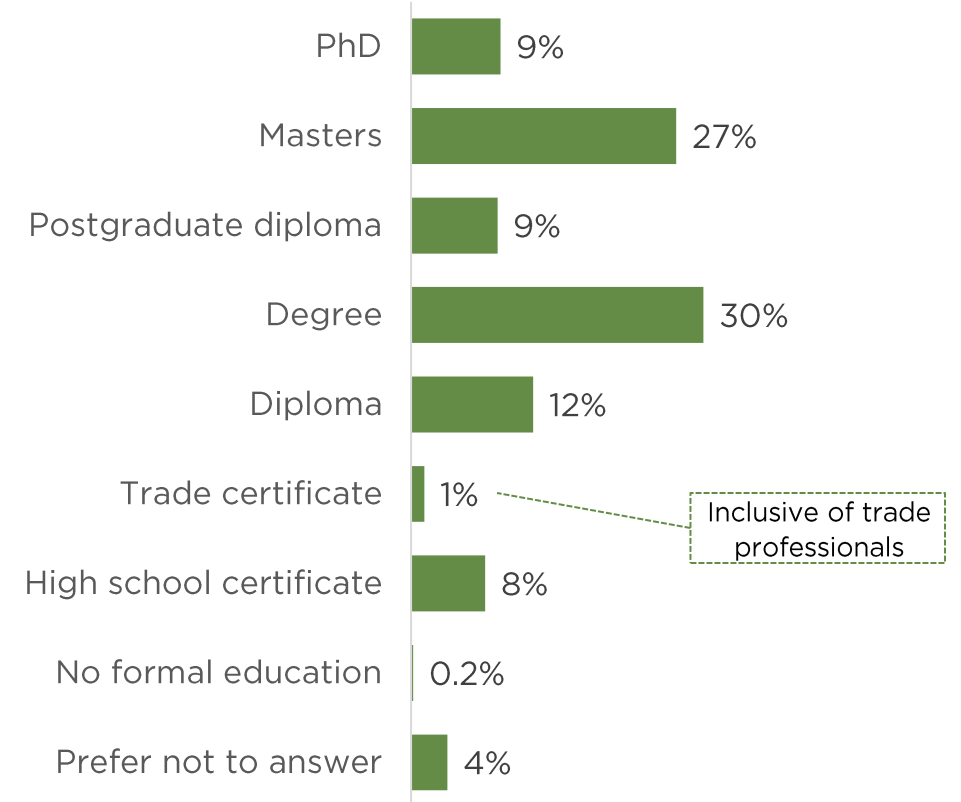
Note: Percentages reflect the share of IVS respondents and are weighted. \$ values are reported in USD, with incomes above USD 1 million treated as outliers. The average exchange rate to PGK and USD for January to December 2024 was applied.

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

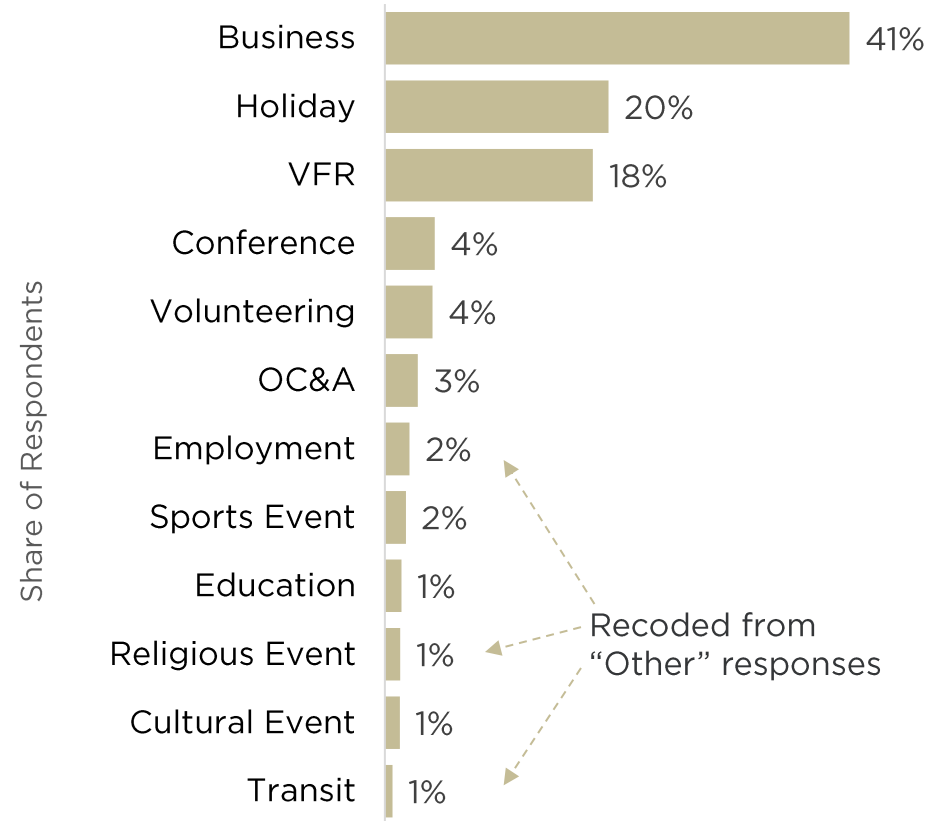


Visitor Satisfaction

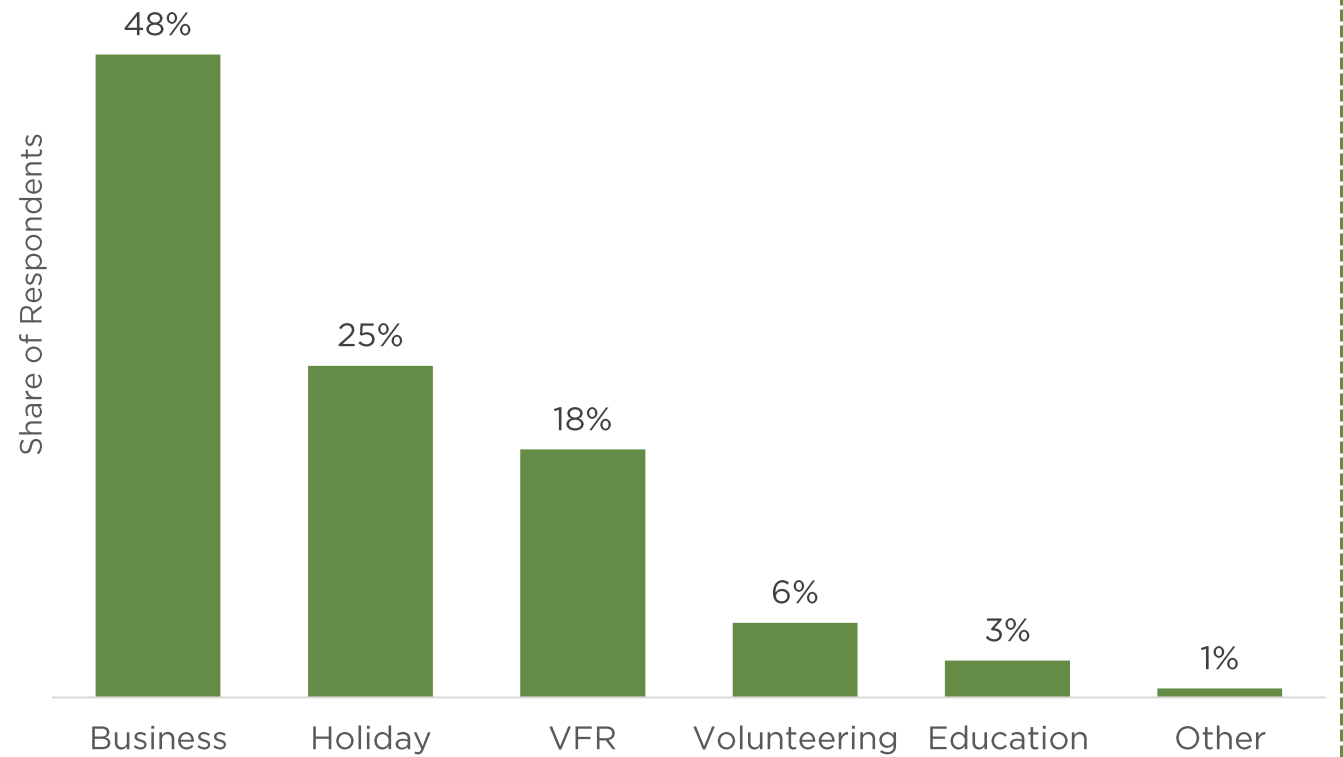
Purpose of Visit

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"

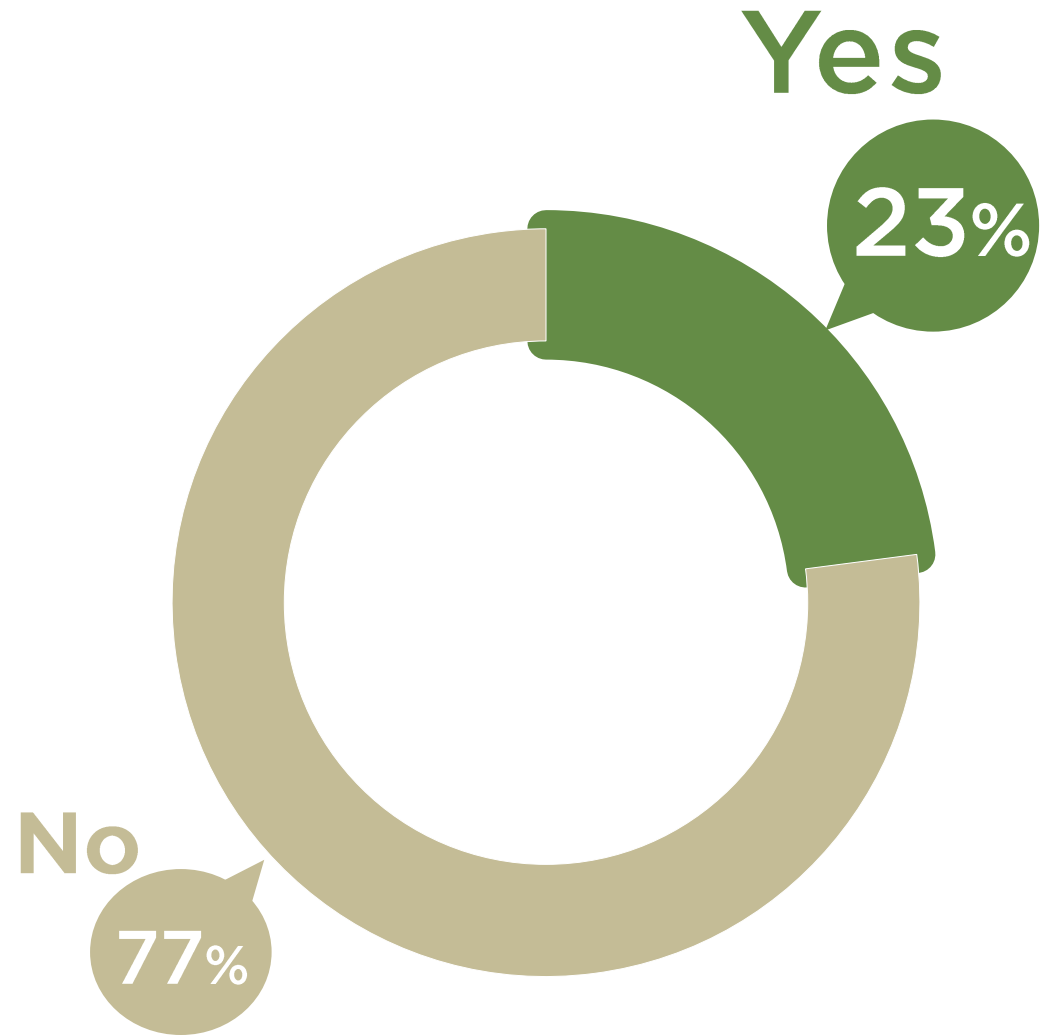
Bigger Trip

Other Countries Visited On The Same Trip



As part of a bigger trip, 23% of respondents visited Australia, with 37% visiting Singapore, Fiji, Vanuatu, New Zealand Philippines and Indonesia.

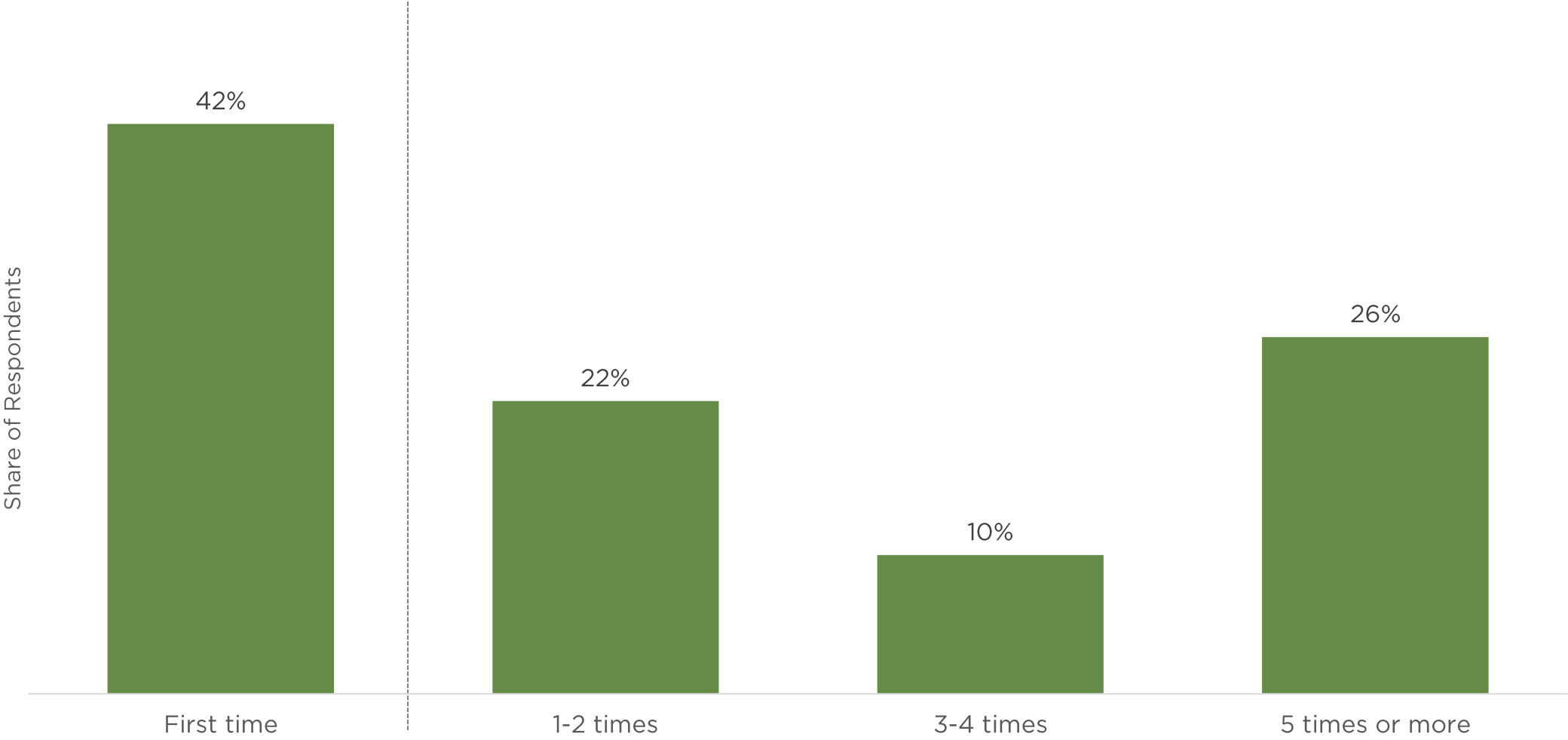
Q Was PNG the only country you visited on this trip?



Note: Total valid responses for this question N=3,688.

Previous Visits

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

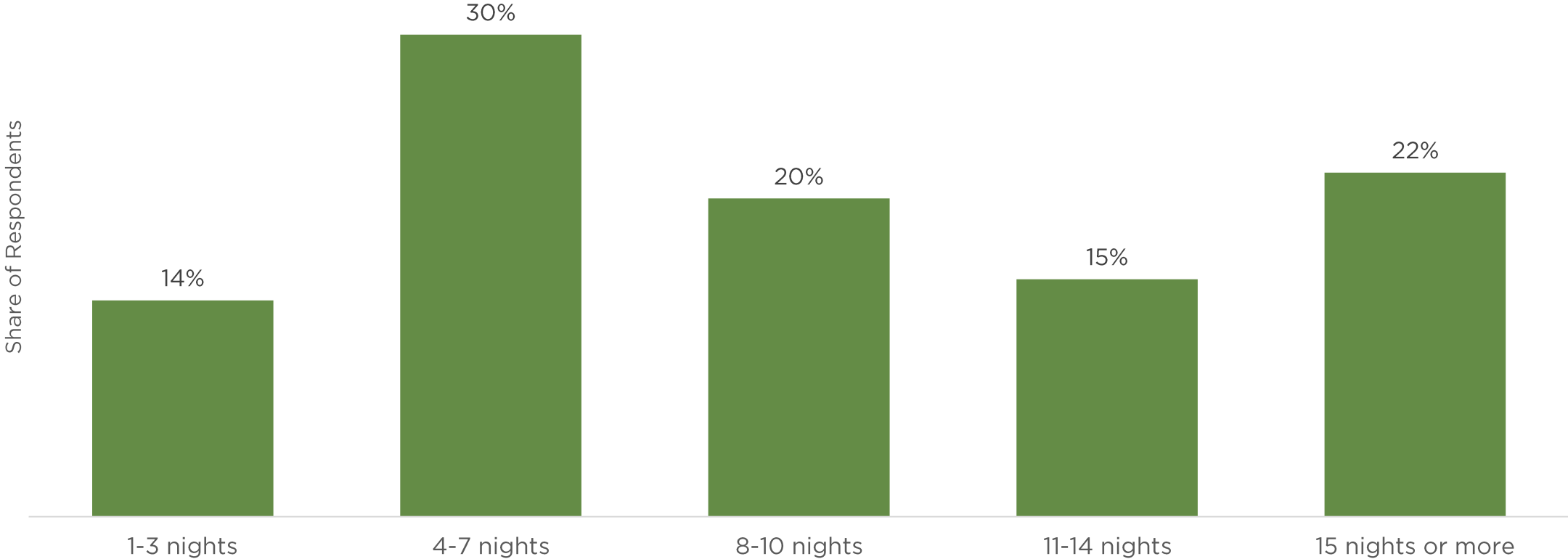


Note: Due to rounding, total does not sum to 100%.

Length of Stay (nights)

Q How many nights did you spend in PNG?

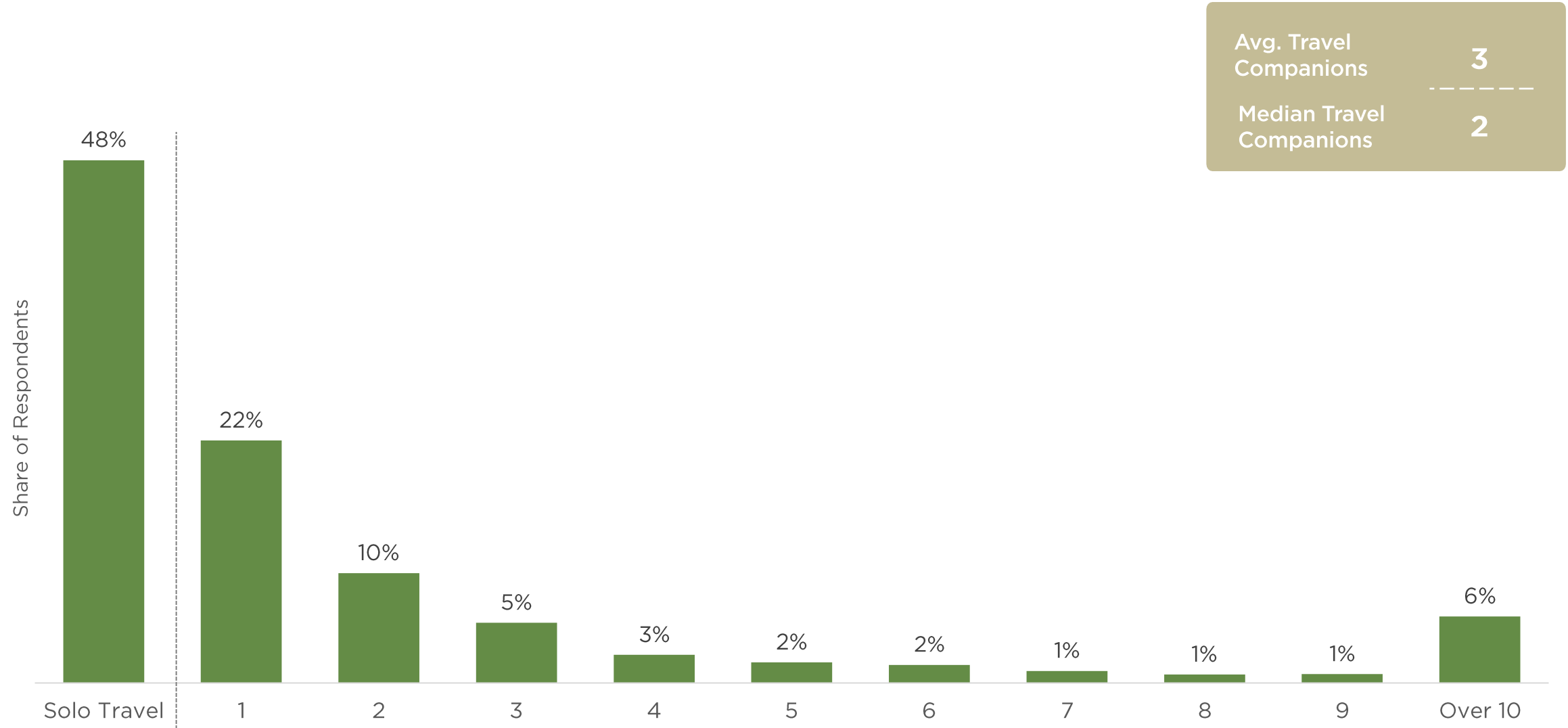
Avg. Length of Stay
10.2 nights



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 (Companions)

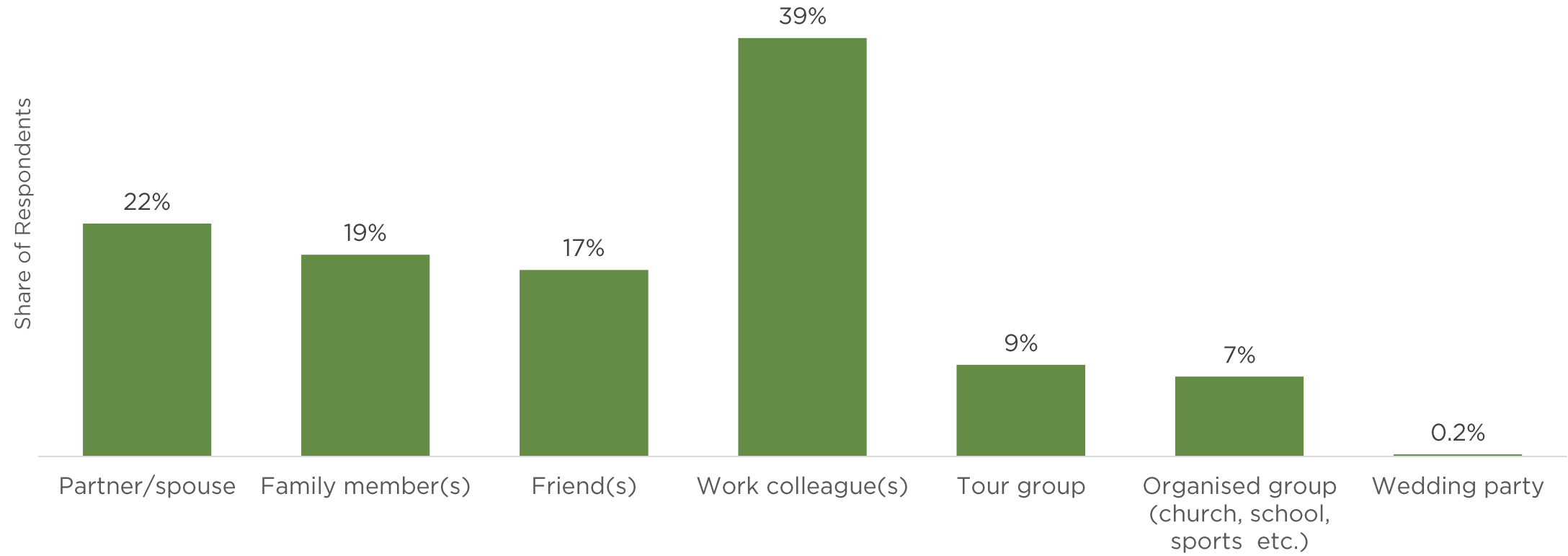
Q How many people accompanied you on this trip?



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 Group Type

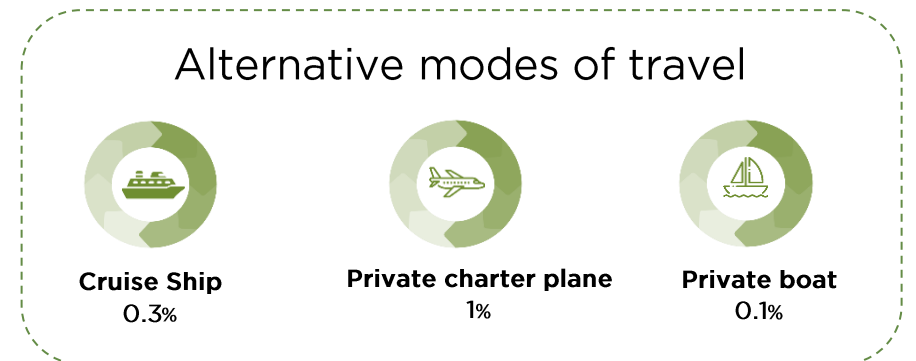
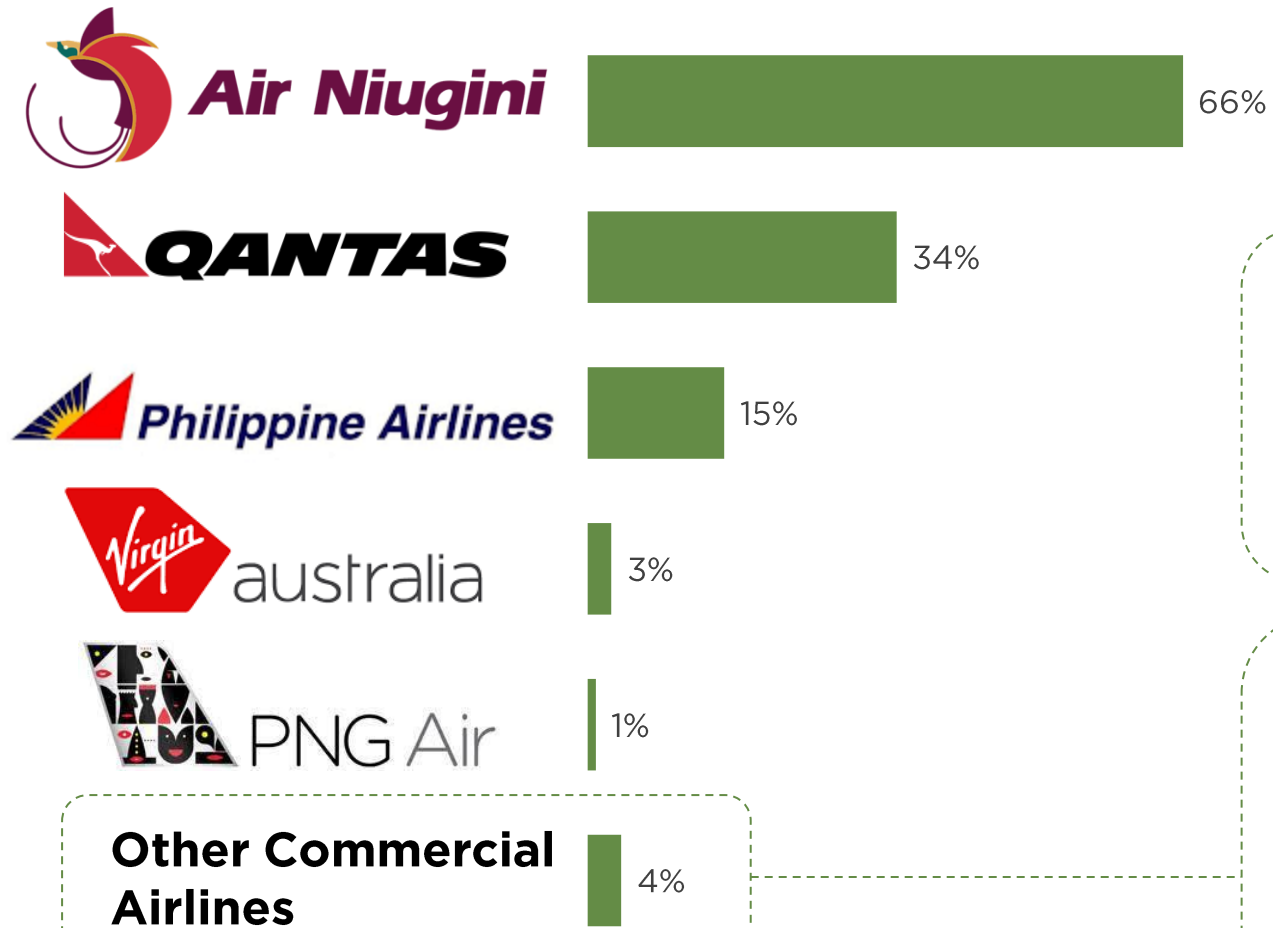
Q Who were your travelling companions?



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

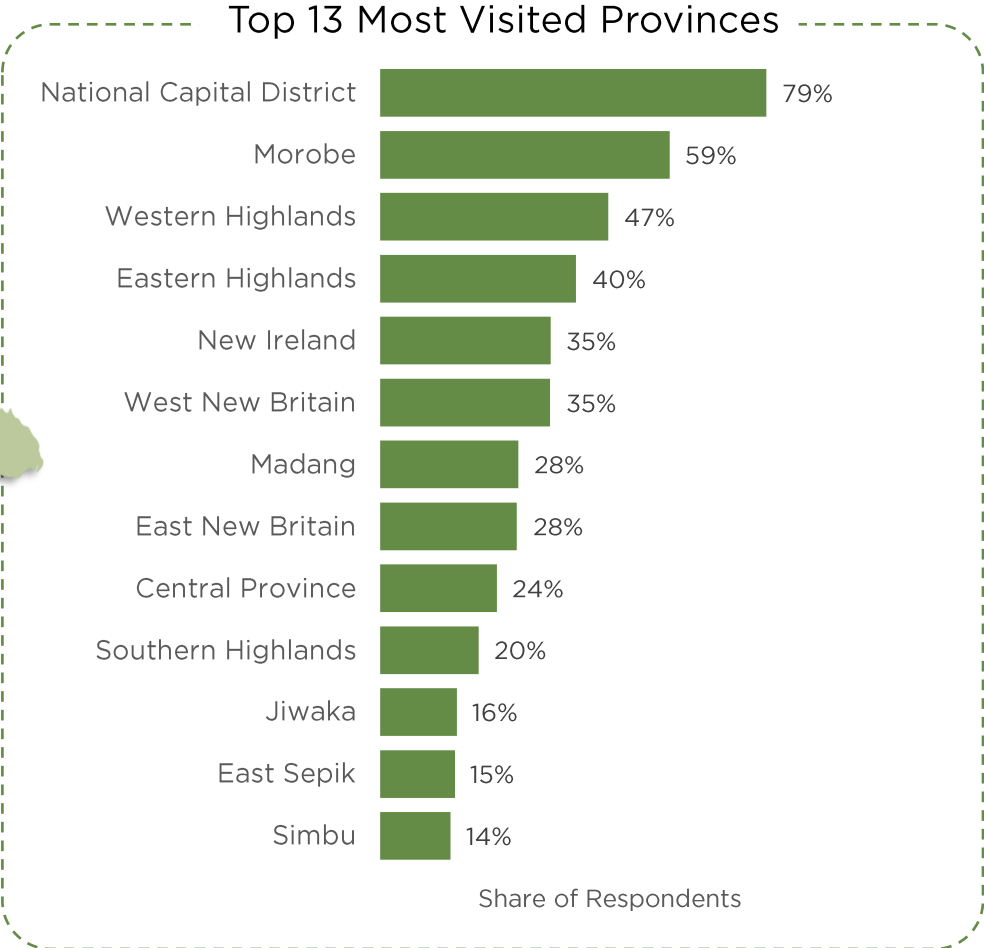
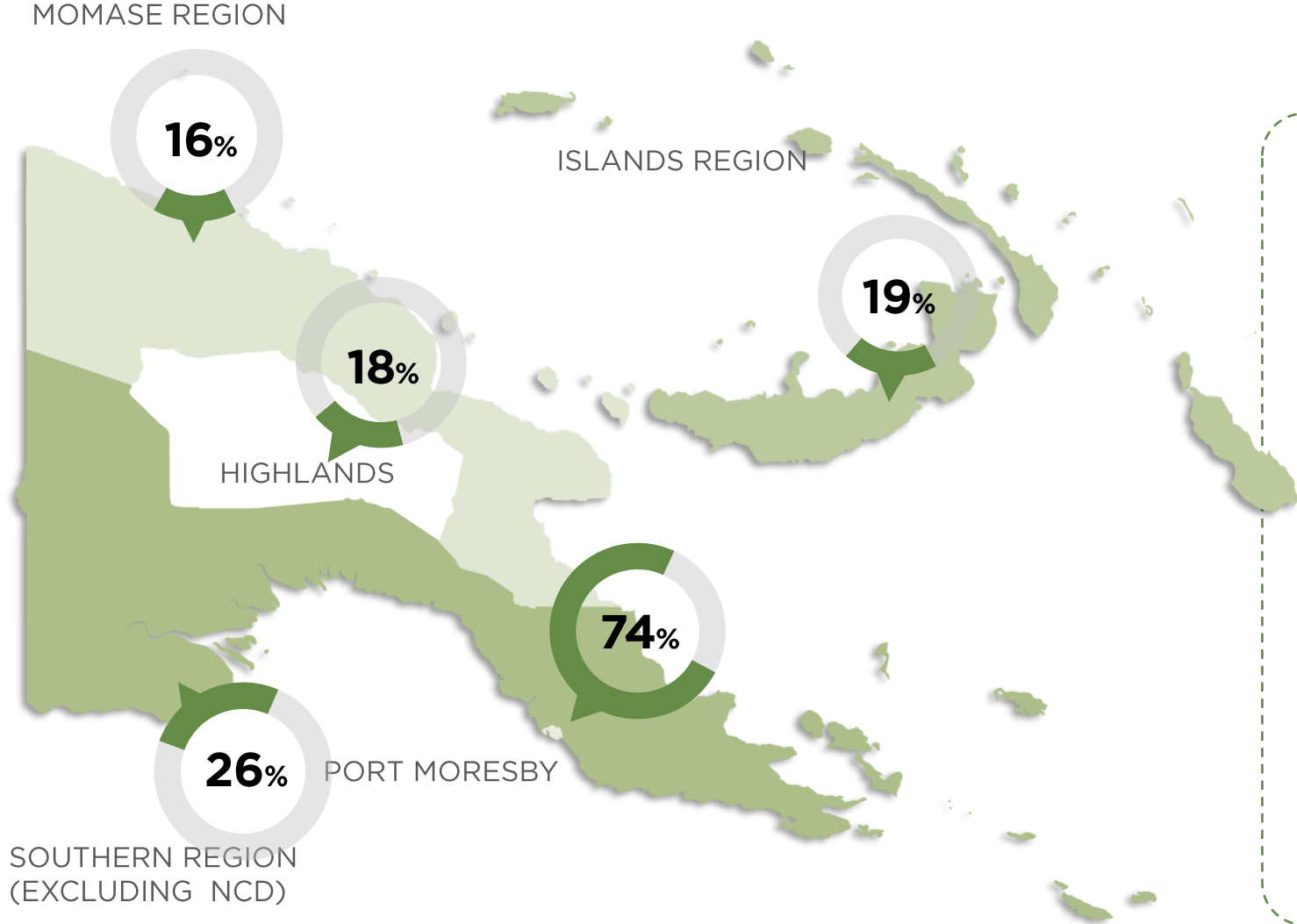
Q How did you travel to PNG?



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?



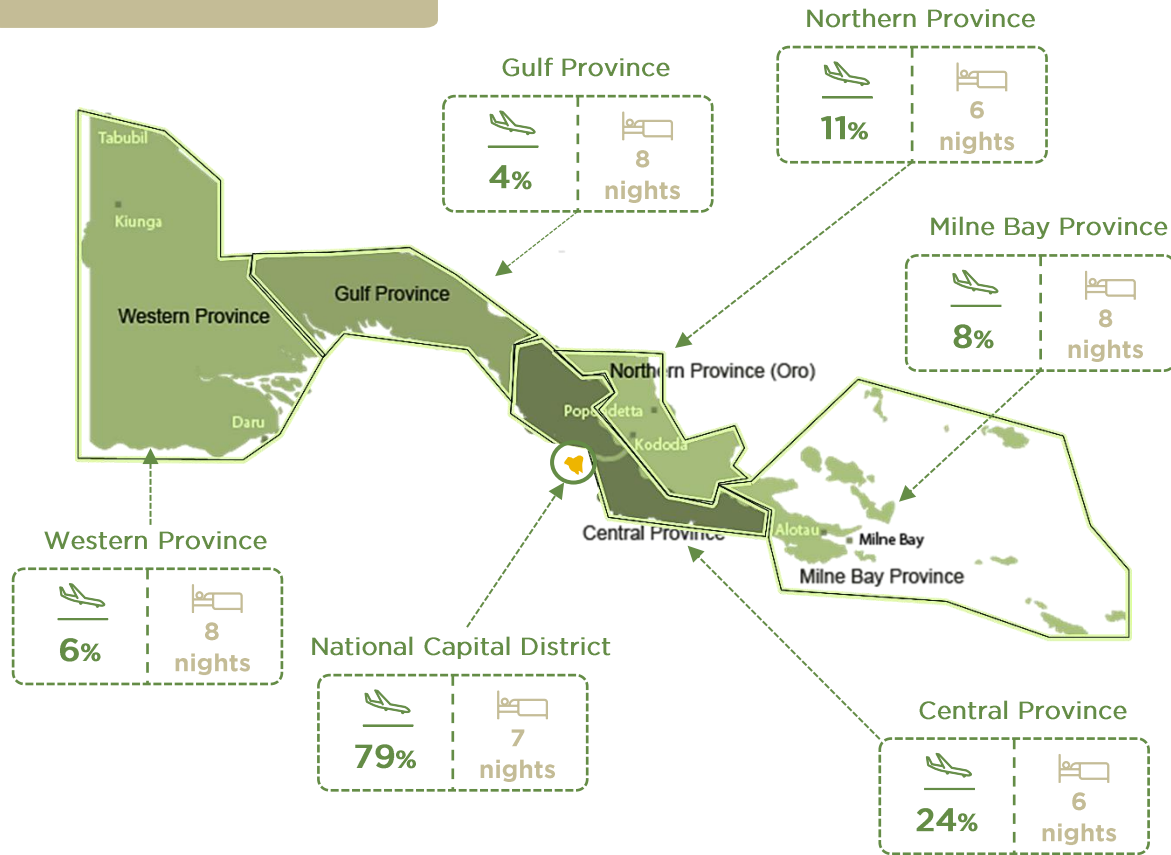
Note: Multiple responses, therefore total does not add up to 100%. NCD stands for National Capital District. ARB stands for Autonomous Region of Bougainville.

Provinces Visited - Avg. Length of Stay

Q How many nights did you spend in each province?

Southern

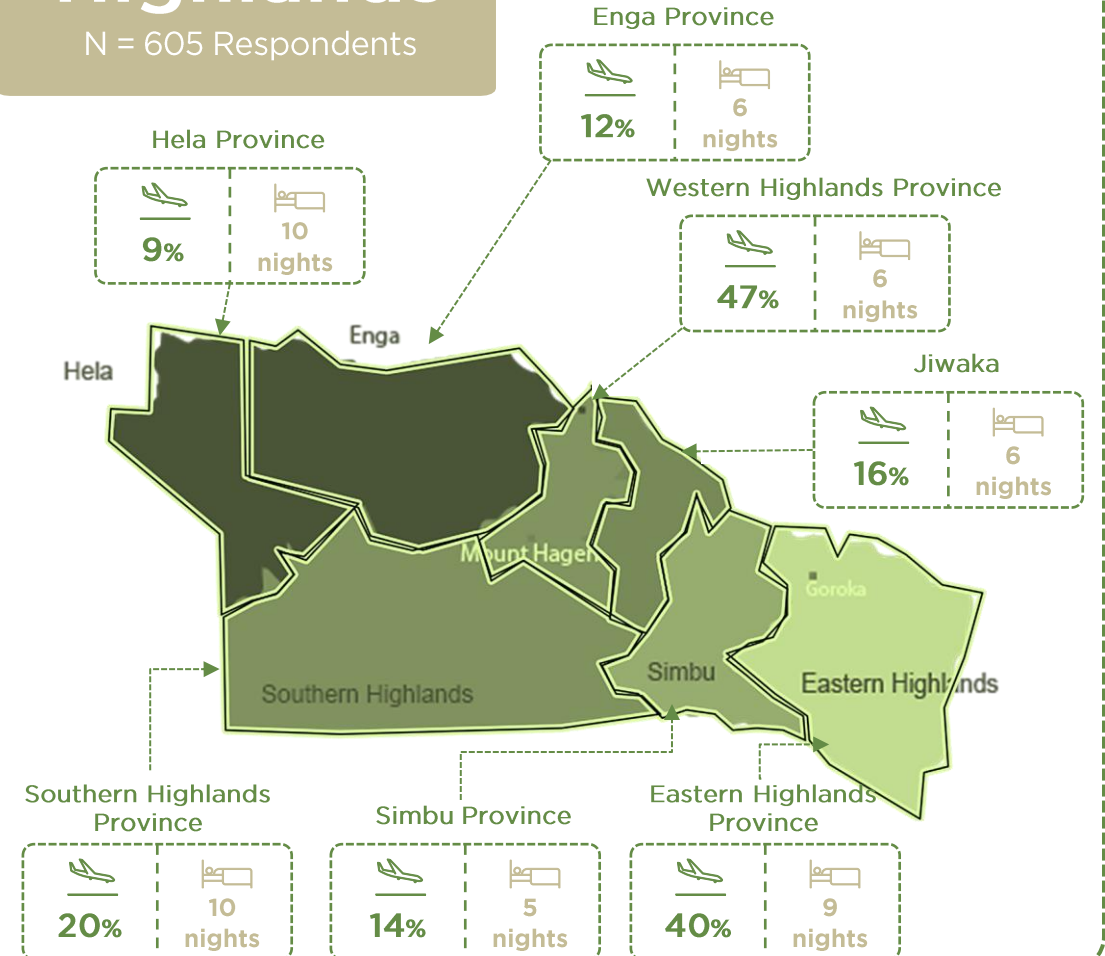
N = 2,443 Respondents



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

Highlands

N = 605 Respondents



Overall Avg. Length of Stay for Highlands Region = 11 nights

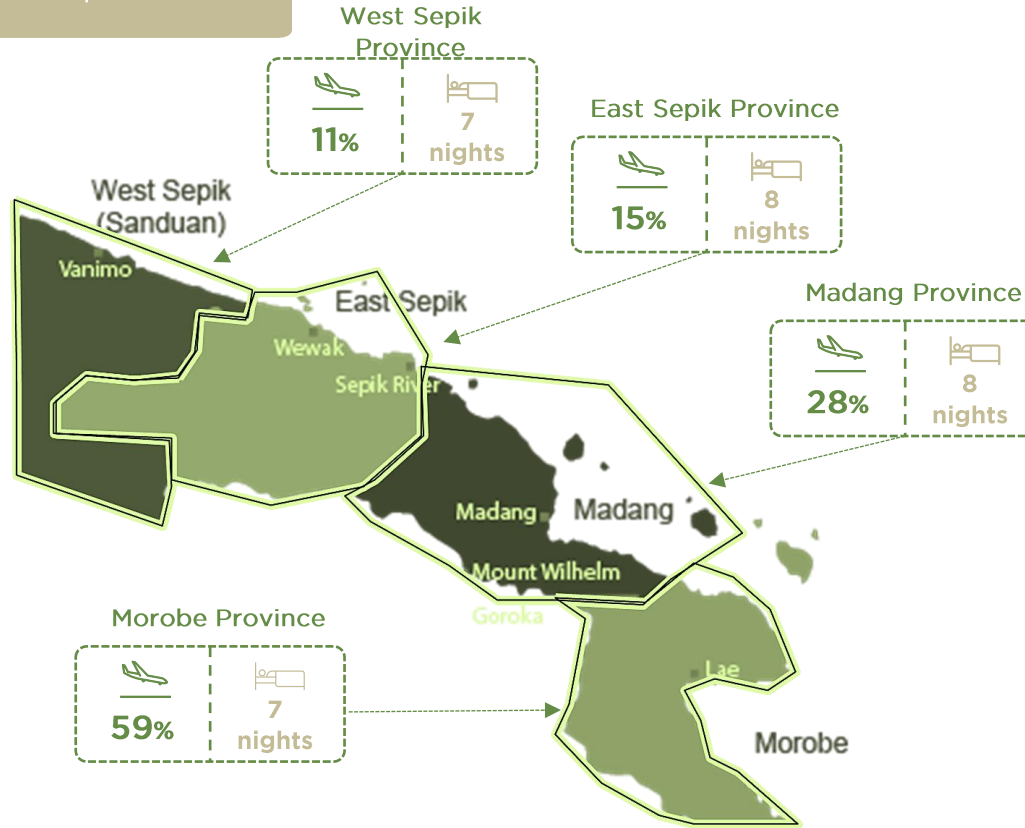
Note: Multiple responses, therefore total does not add up to 100%. Stays of 30 nights or more were excluded to focus on short-term visits. A 29-night threshold was set to include full-month stays, even in February.

Provinces Visited - Avg. Length of Stay

Q How many nights did you spend in each province?

Momase

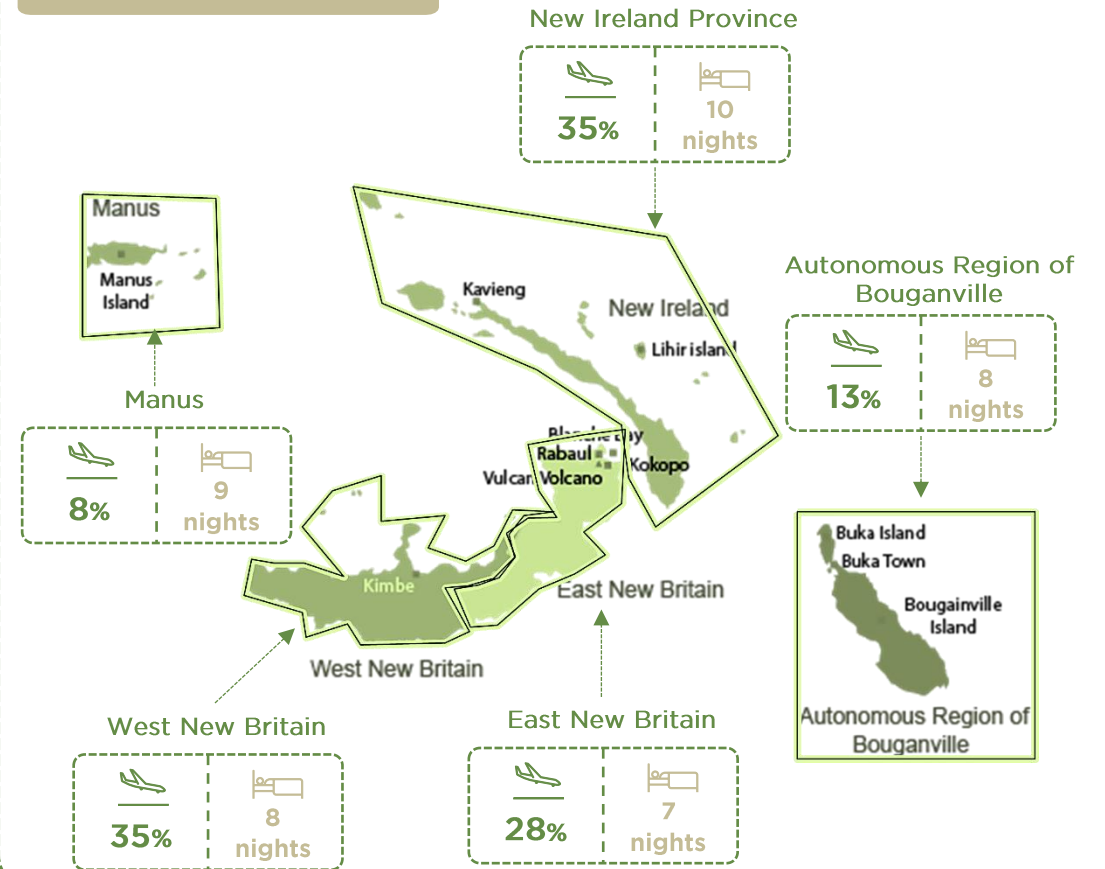
N = 513 Respondents



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

Islands

N = 614 Respondents

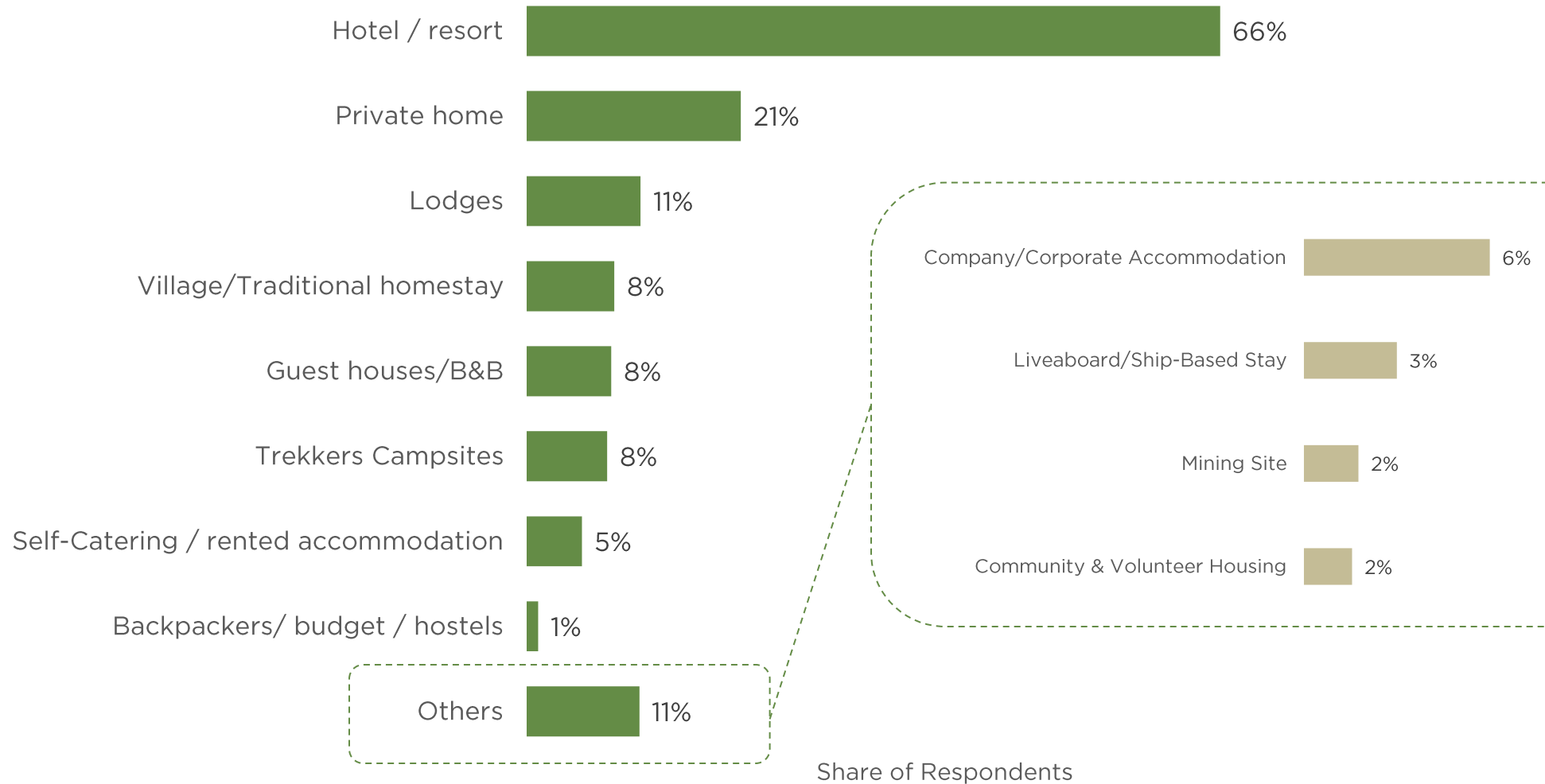


Overall Avg. Length of Stay for Islands Region = 10 nights

Note: Due to multiple responses, the total does not add up to 100%. 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.

Type of Accommodation Stayed

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

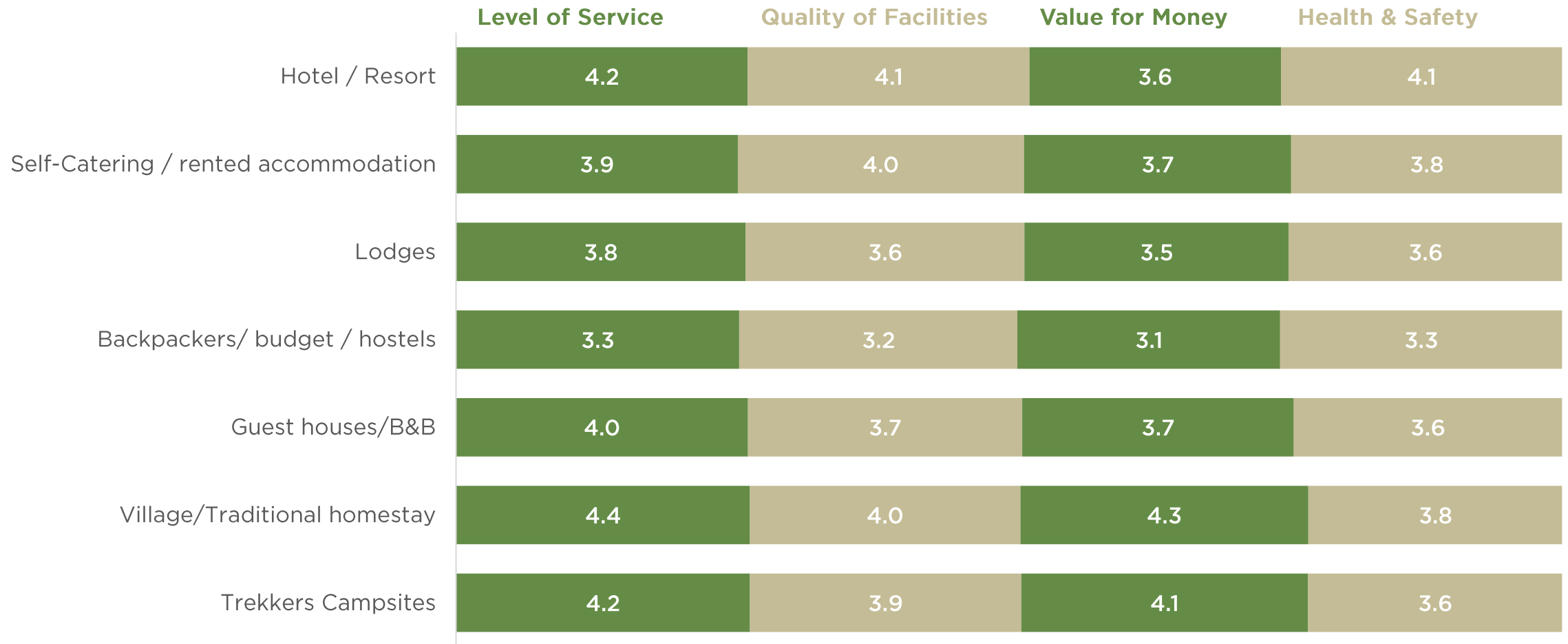


Share of Respondents

Note: Totals may not add up to 100% due to multiple responses. Respondents noted in 'Others' non-standard accommodation types such as mining campsites and liveaboard/ship-based stays. 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?



Scale: 1=Very Dissatisfied to 5=Very Satisfied

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



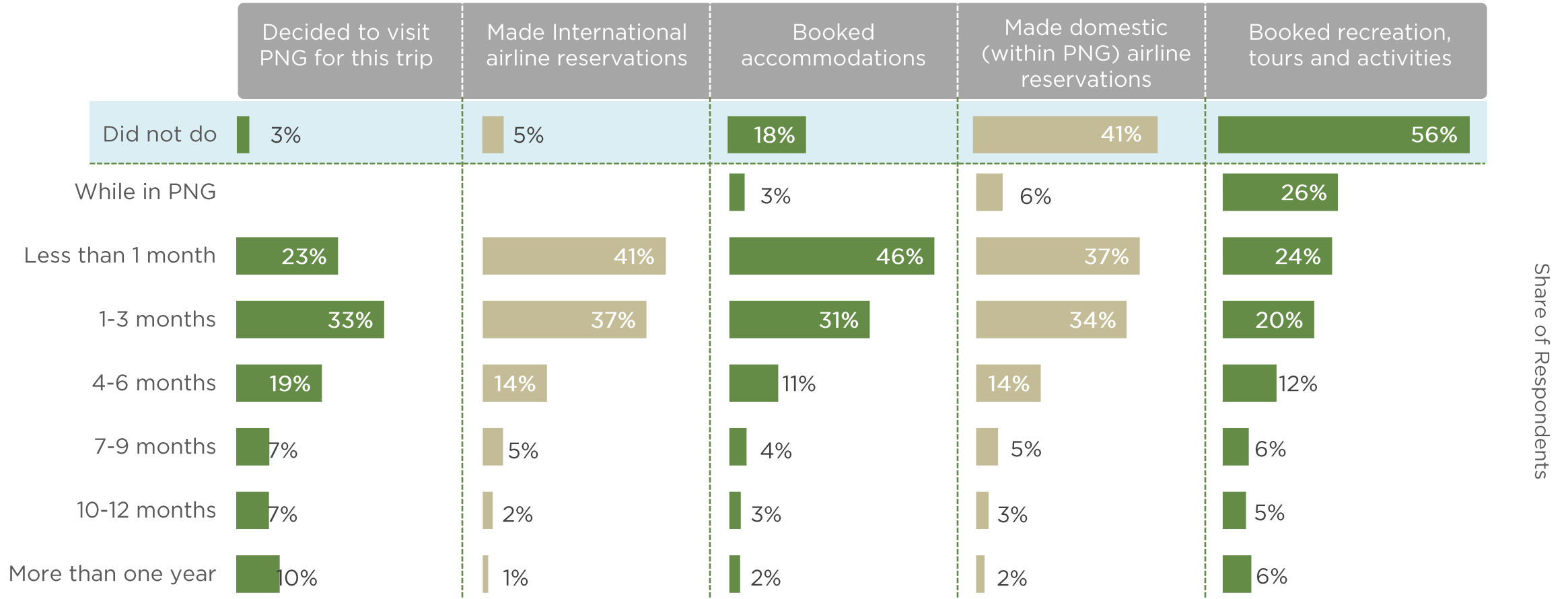
Visitor Spending
& Impact



Visitor
Satisfaction

Trip Planning and Booking Window

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



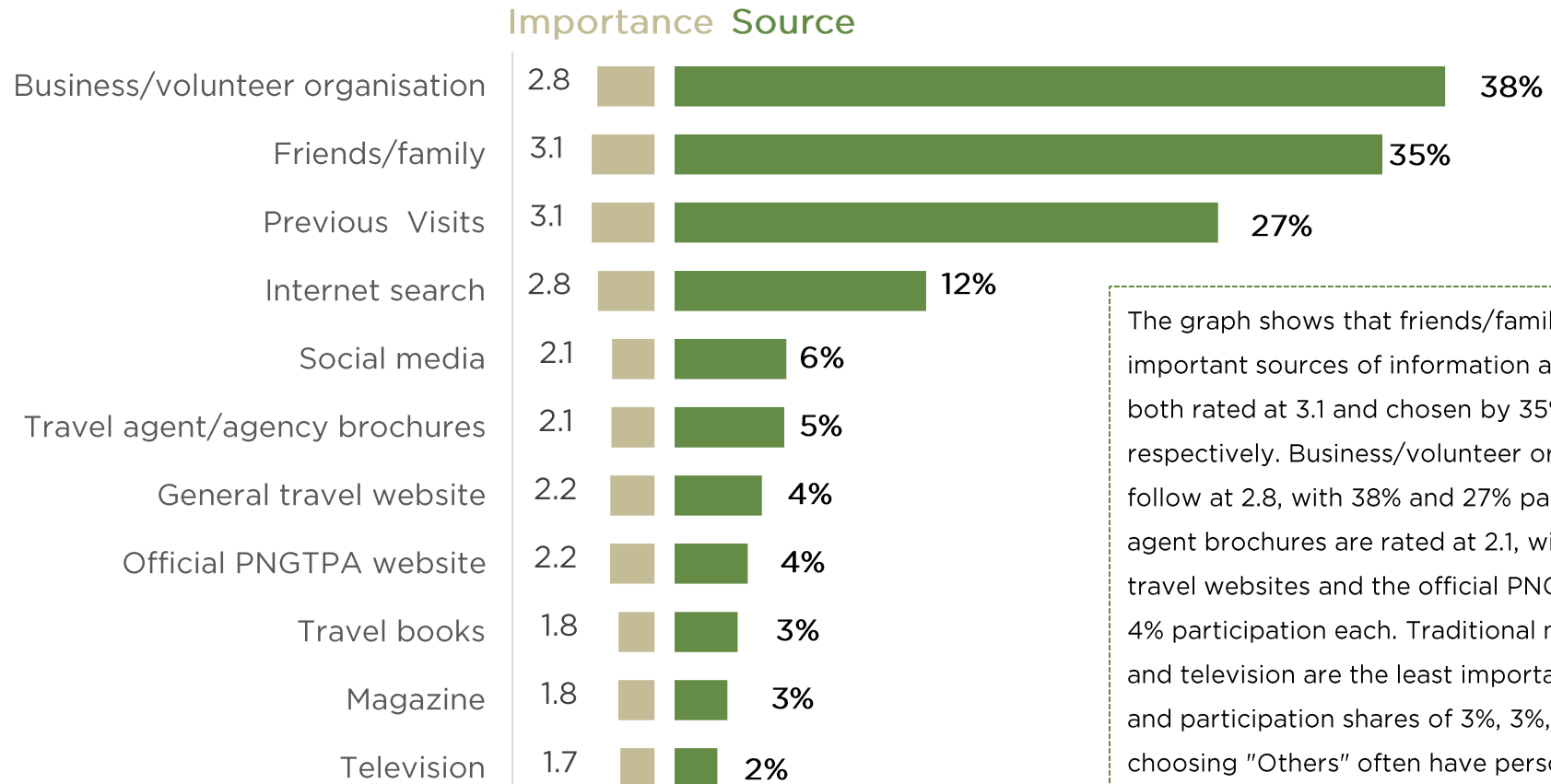
Note: The "Did not do" category was overwhelmingly predominant, making other categories appear relatively small. To clarify, frequency analysis was conducted twice: once including and once excluding this category. The second analysis, excluding the "Did not do" category, ensures that the remaining data 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?



The graph shows that friends/family and previous visits are the most important sources of information about Papua New Guinea (PNG), both rated at 3.1 and chosen by 35% and 27% of respondents, respectively. Business/volunteer organizations and internet searches follow at 2.8, with 38% and 27% participation. Social media and travel agent brochures are rated at 2.1, with 6% and 5% participation. General travel websites and the official PNGTPA website are rated at 2.2, with 4% participation each. Traditional media like travel books, magazines, and television are the least important, with ratings between 1.7 and 1.8 and participation shares of 3%, 3%, and 2%, respectively. Respondents choosing "Others" often have personal connections to PNG.

Share of Respondents

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



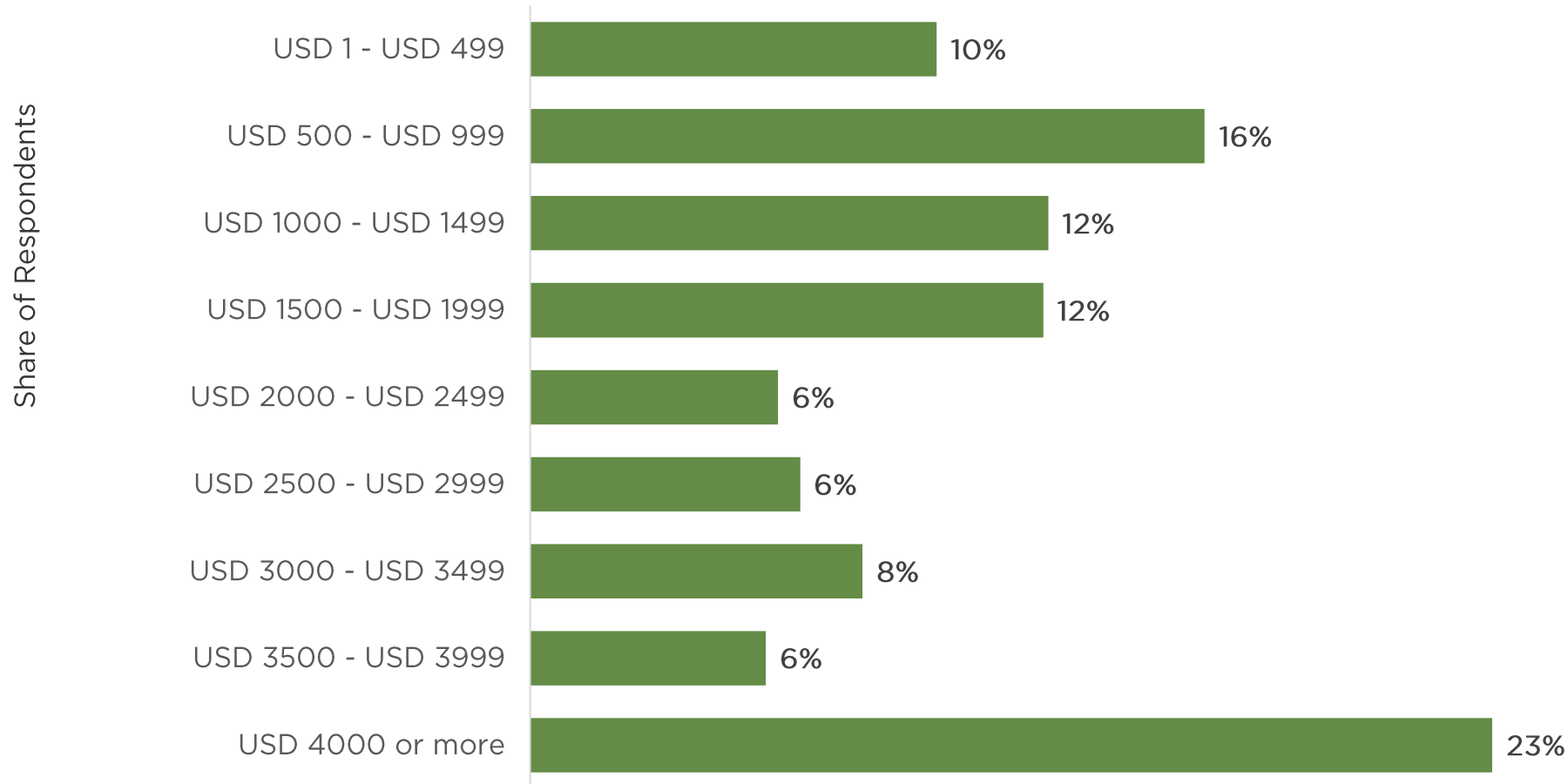
Visitor Spending
& Impact



Visitor
Satisfaction

Prepaid expenditure per person

Q How much did you pay prior to your arrival?



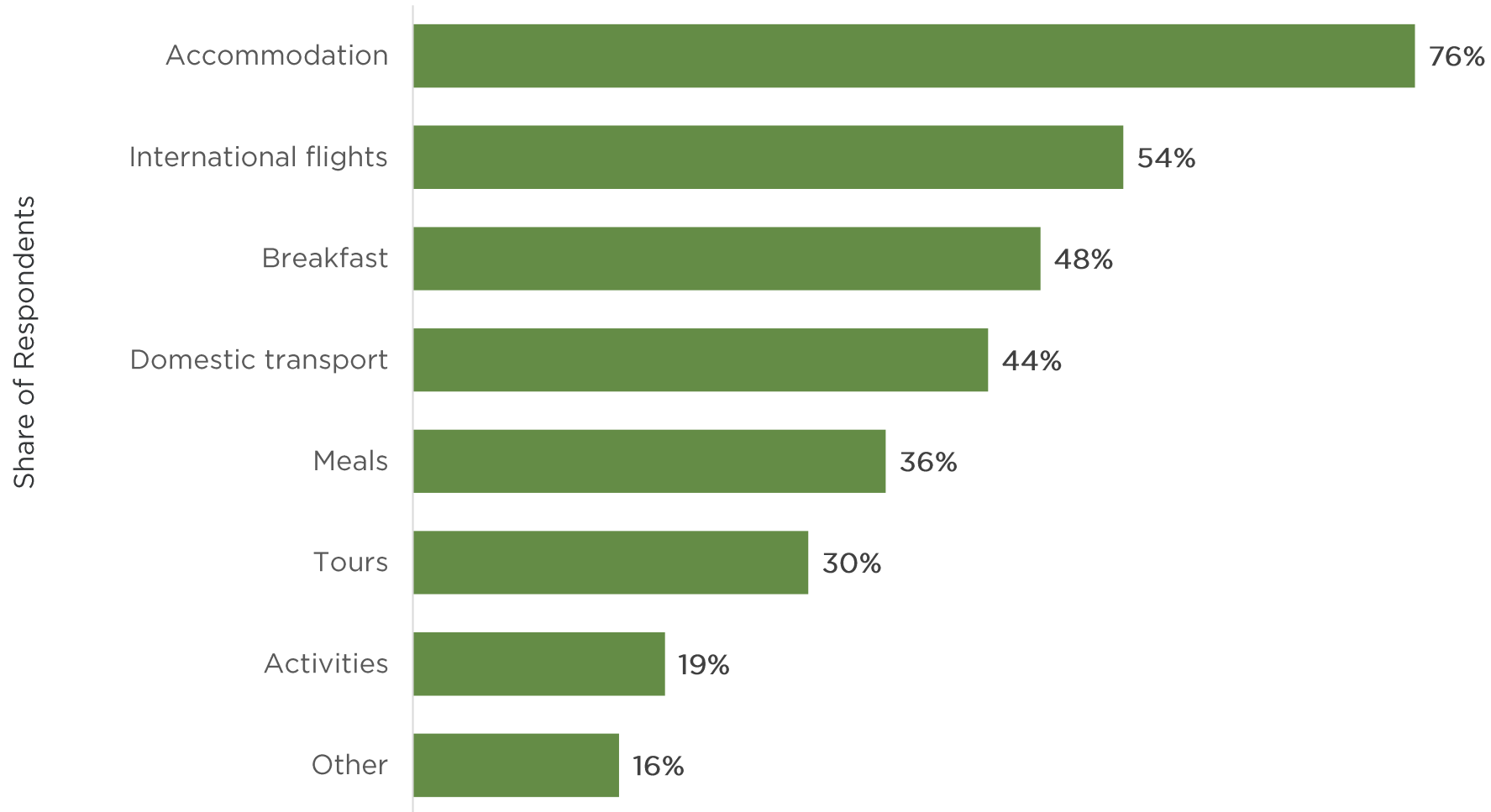
Avg. prepaid spend
USD 2,613

Avg. prepaid spend
PGK 9,918

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	40	55	212
Food & Beverage	16	22	84
Domestic Travel	8	11	43
Retail	2	3	12
Souvenir	7	10	37
Tour	4	5	19
Local Transport	9	13	50
Other	11	15	59
Internet & Service	2	2	8
TOTAL	100	136	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	2,613	9,918
<i>Flowing into local economy rate</i>	<i>estimated 65%</i>	
Per Person Per Trip	1,699	6,447
Per Person per Day	166	632

Average Local Spend		
<i>Length of Stay (nights)</i>	<i>mean 10.2 nights</i>	
Per Person Per Trip	1,385	5,354
Per Person per Day	136	525

Total Economic Impact-Per Trip	3,084	11,801
Total Economic Impact-Per Day	302	1,156

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 - DEC 2023

USD 283 MILLION

FROM 112,775 VISITORS



\$2,218

Prepaid per visitor per trip

\$100

In-country spend per day

65%

Flowing into local economy rate



x 10.8 nights
Average length of stay

\$1,442

Prepaid per visitor per trip

\$1,072

In-country spend per trip



\$2,514

 per visitor per trip

\$234

 per visitor per day

JAN - DEC 2024

USD 309 MILLION

FROM 100,223 VISITORS ▼



\$2,613 ▲

Prepaid per visitor per trip

\$136 ▲

In-country spend per day

65%

Flowing into local economy rate



x 10.2 nights ▼
Average length of stay

\$1,699 ▲

Prepaid per visitor per trip

\$1,385 ▲

In-country spend per trip



\$3,084

 per visitor per trip ▲

\$302

 per visitor per day ▲

Note: US dollars. All amounts are per person. Weight adjusted.

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?

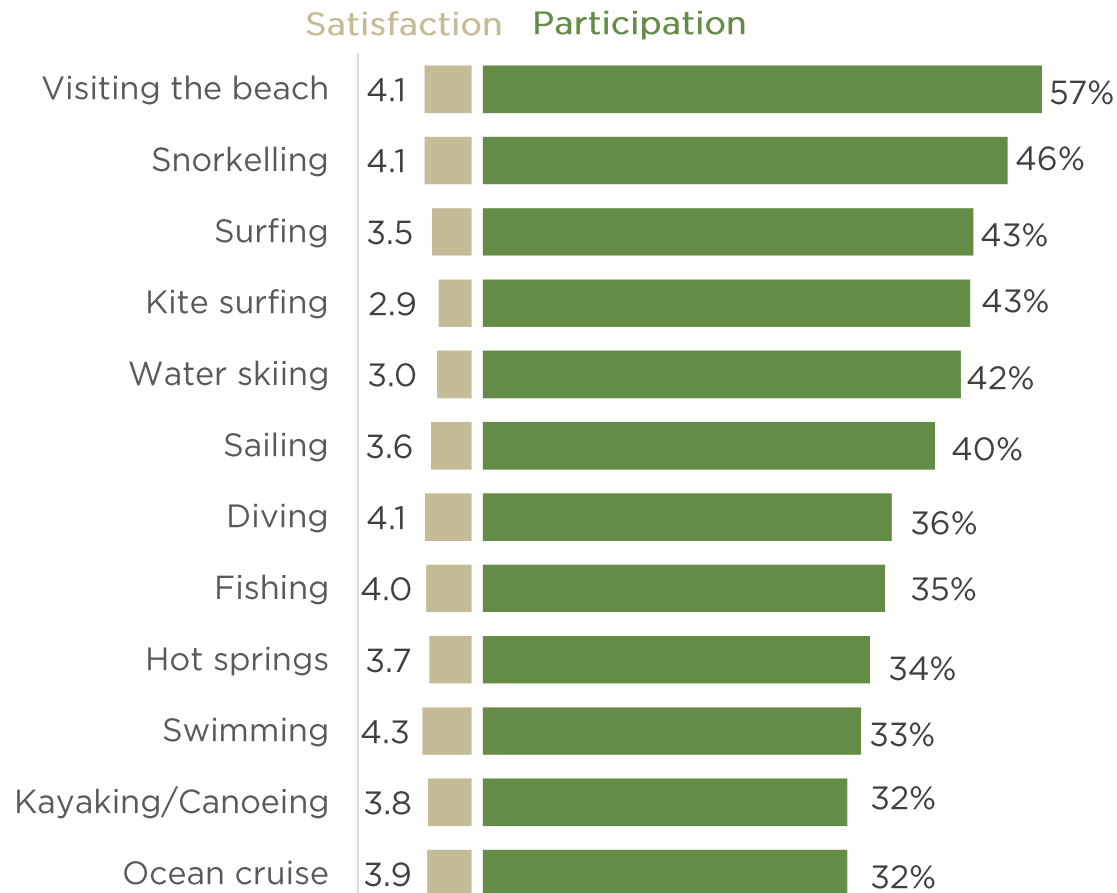


Note: Totals may not add up to 100% due to multiple responses.

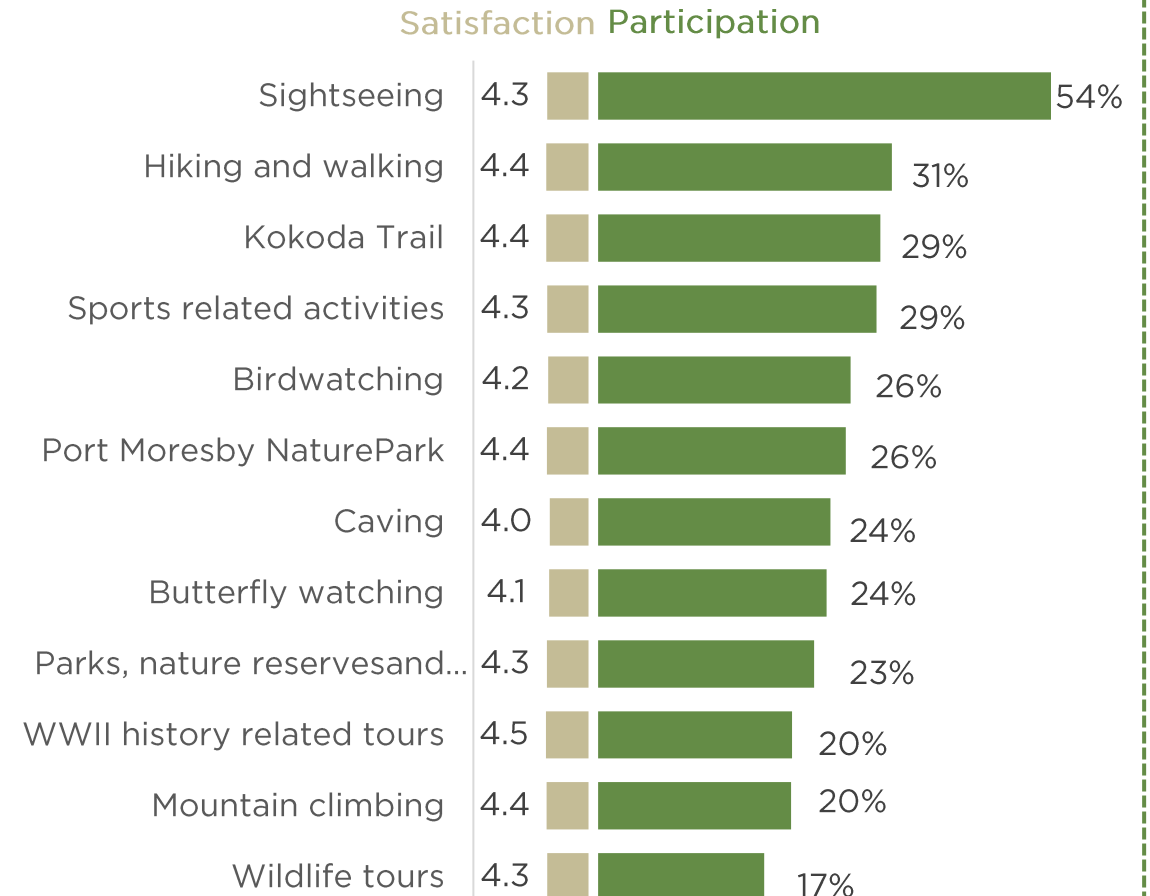
Satisfaction with Activities

Q How satisfied were you with the following?

Water-based activities



Land-based activities

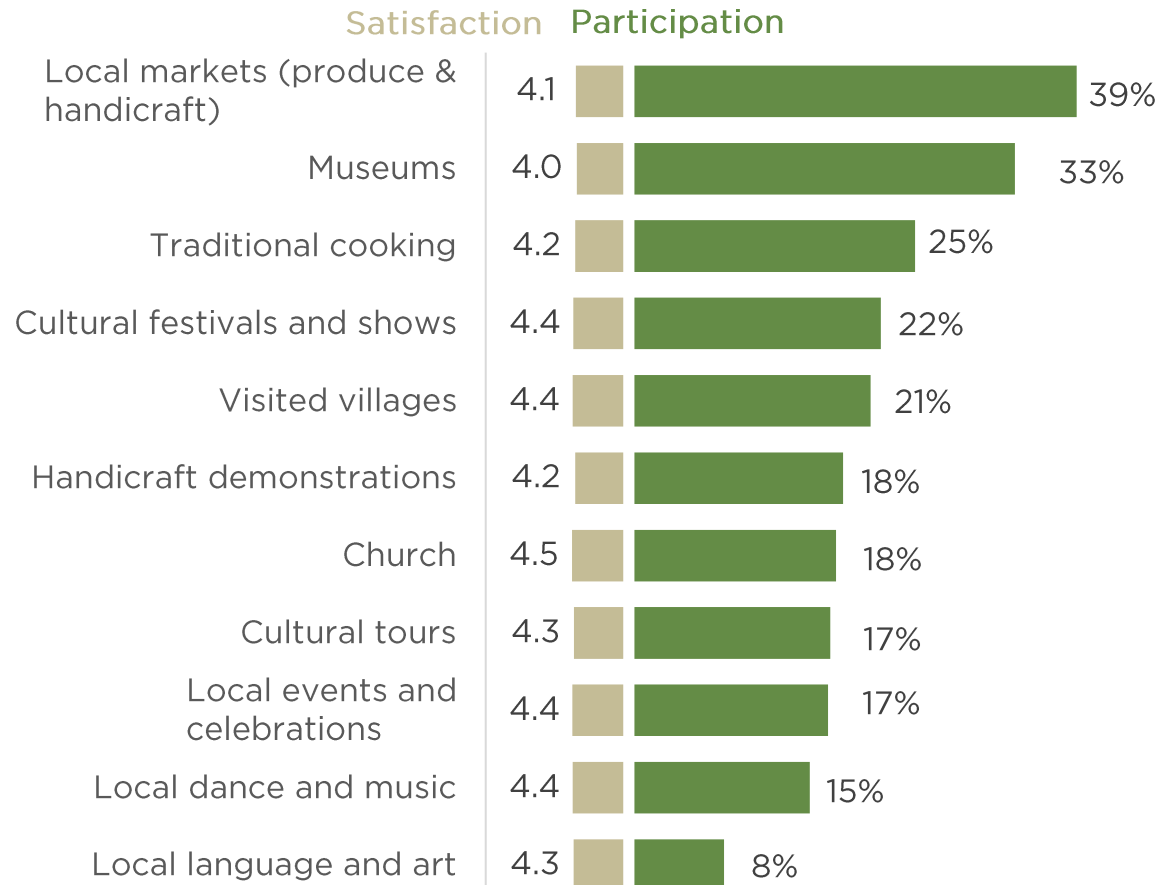


Scale: 1=very dissatisfied to 5=very satisfied

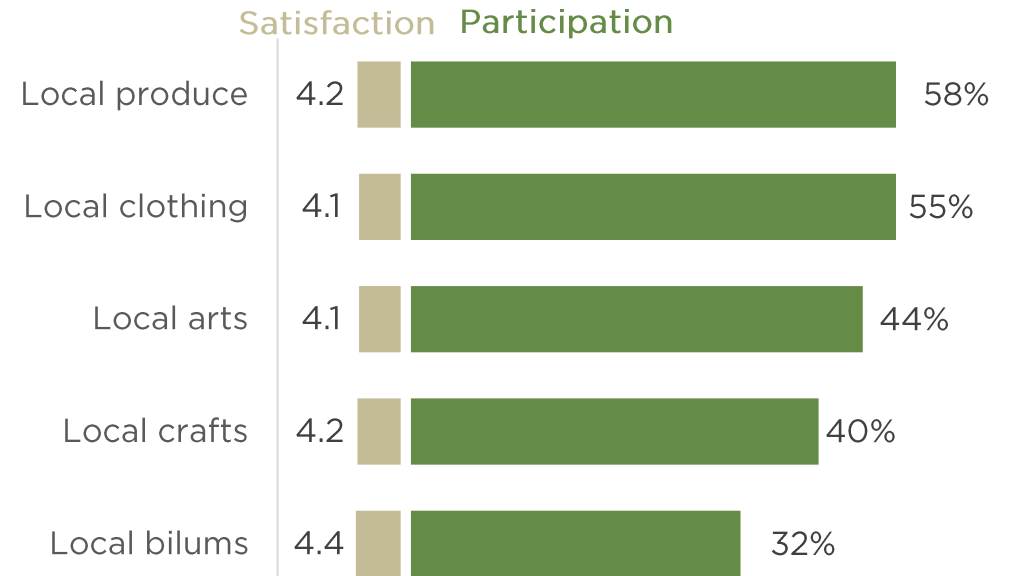
Satisfaction with Activities

Q How satisfied were you with the following?

Cultural activities



Shopping activities

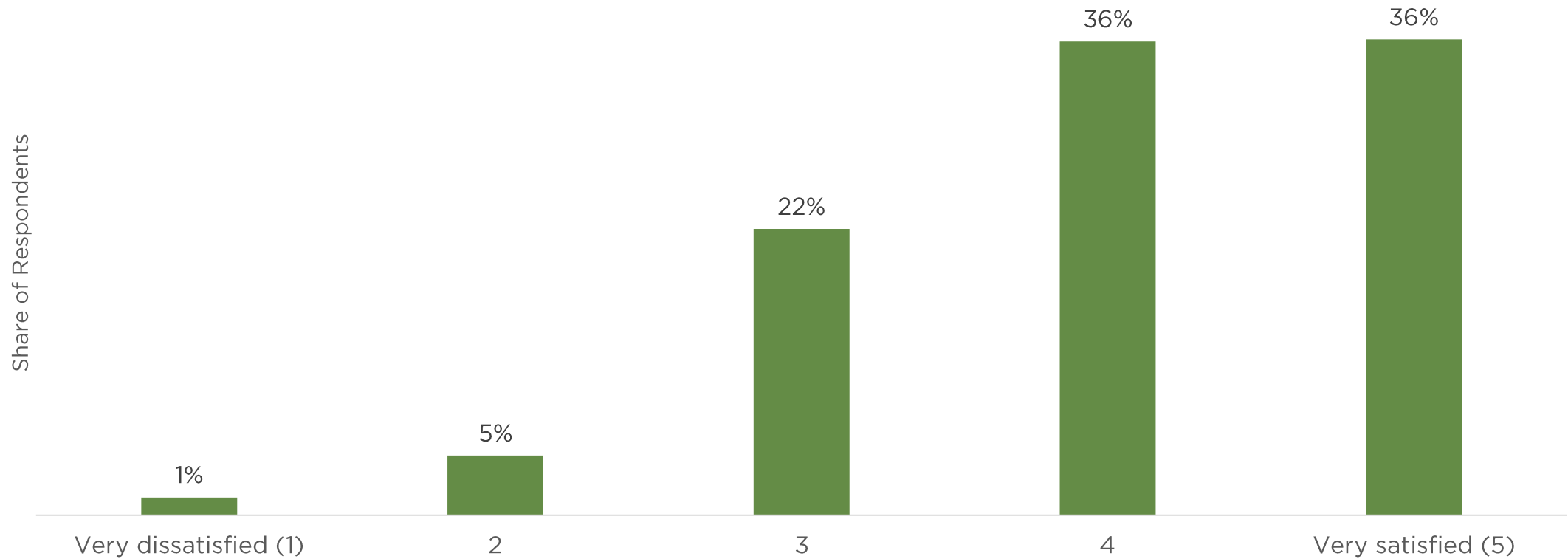


Scale: 1=very dissatisfied to 5=very satisfied

Visitor Overall Satisfaction

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

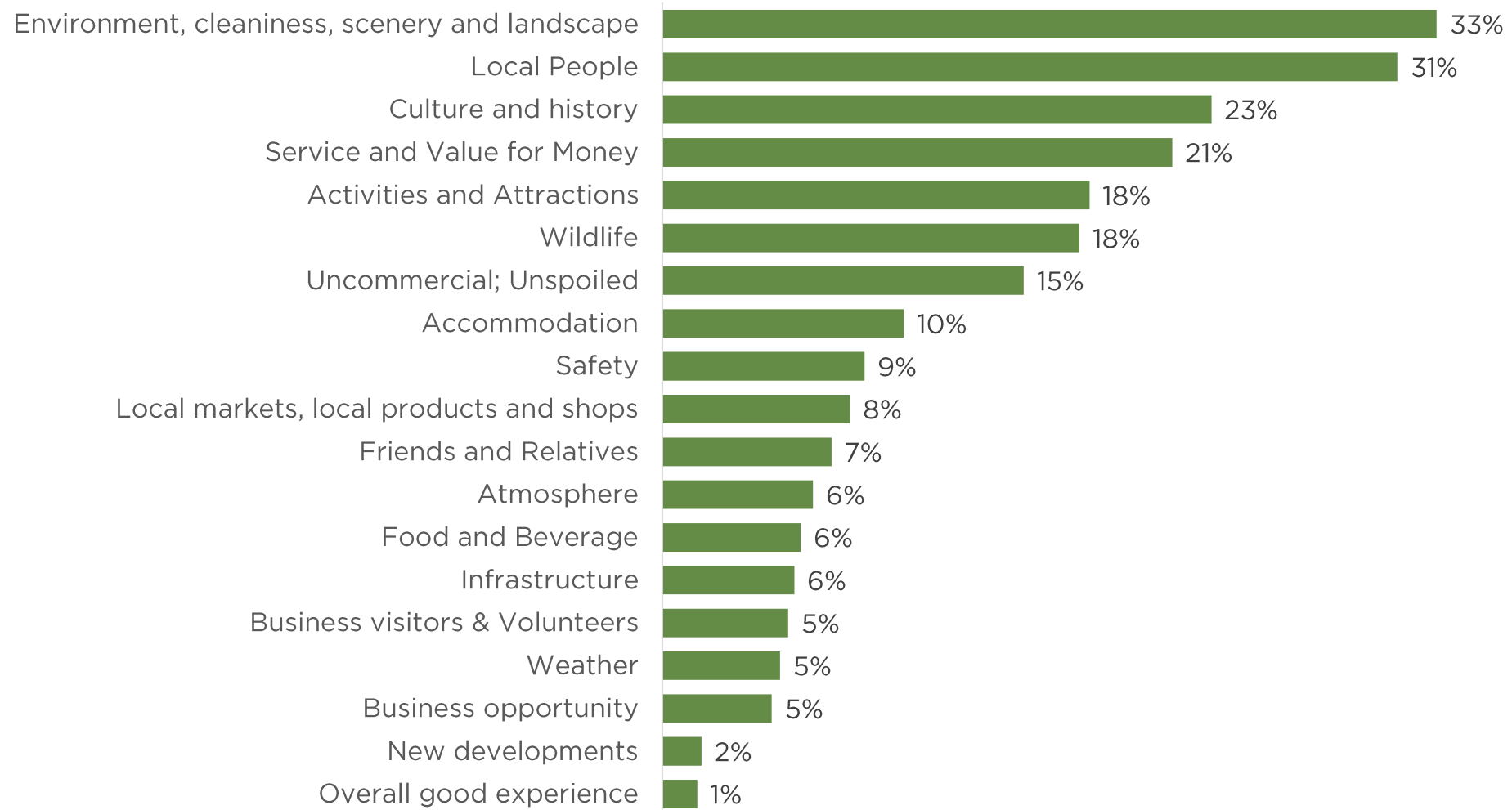
Avg. Overall Satisfaction	4
Median Overall Satisfaction	4



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?

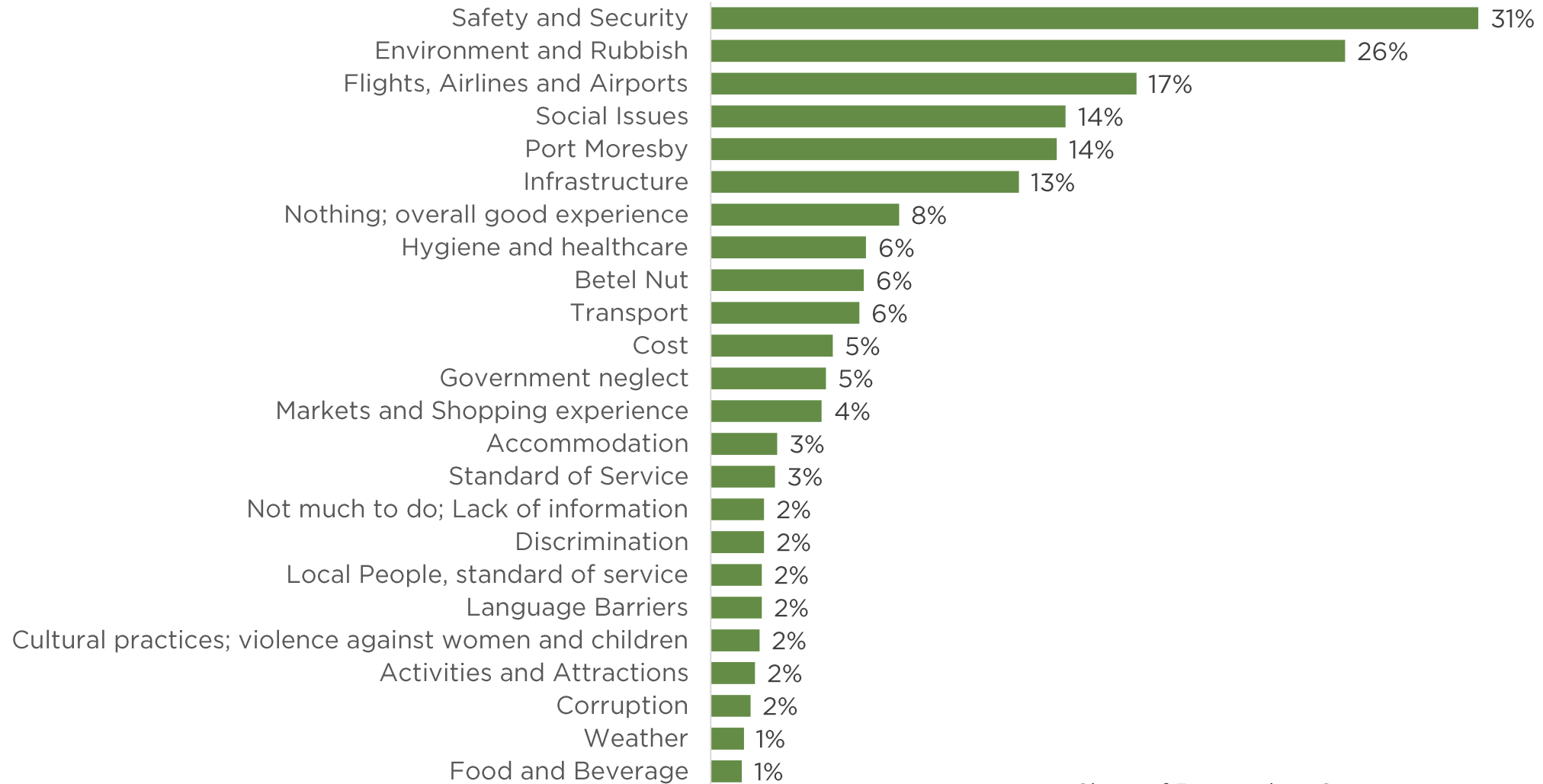


Share of Respondent Comments

Note: Total response N=2,248. 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=1,073. Multiple response analysis, so total does not add up to 100%

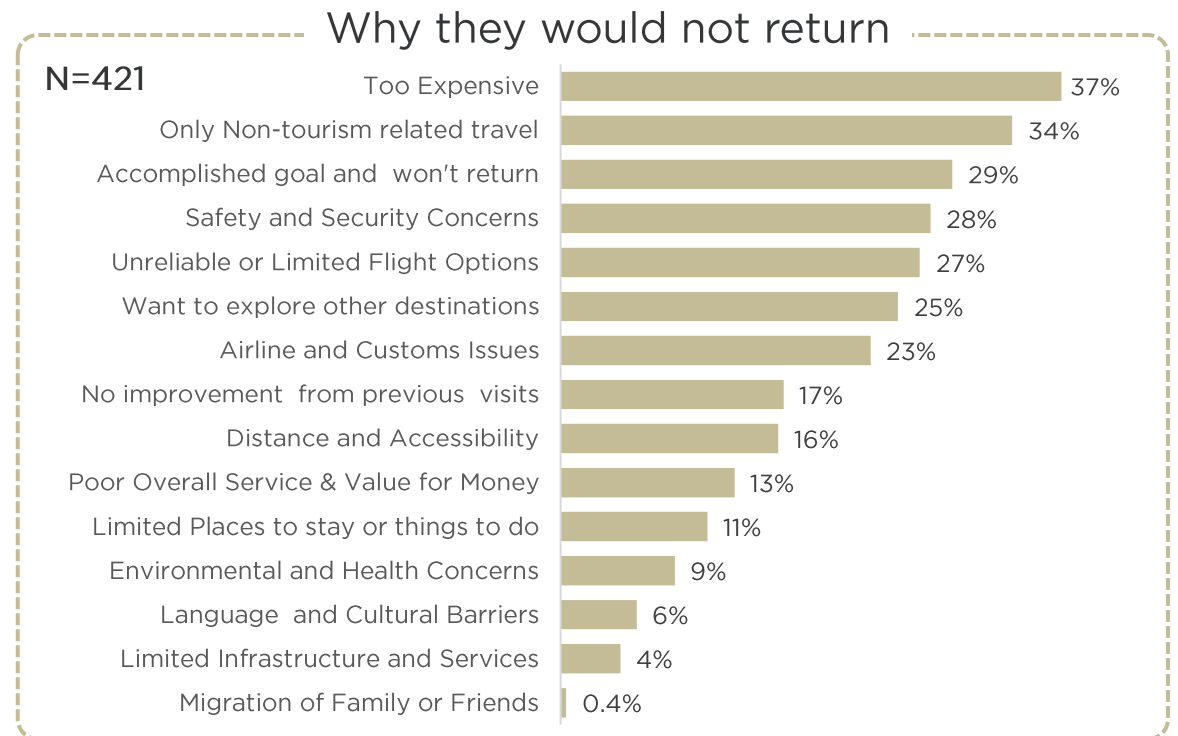
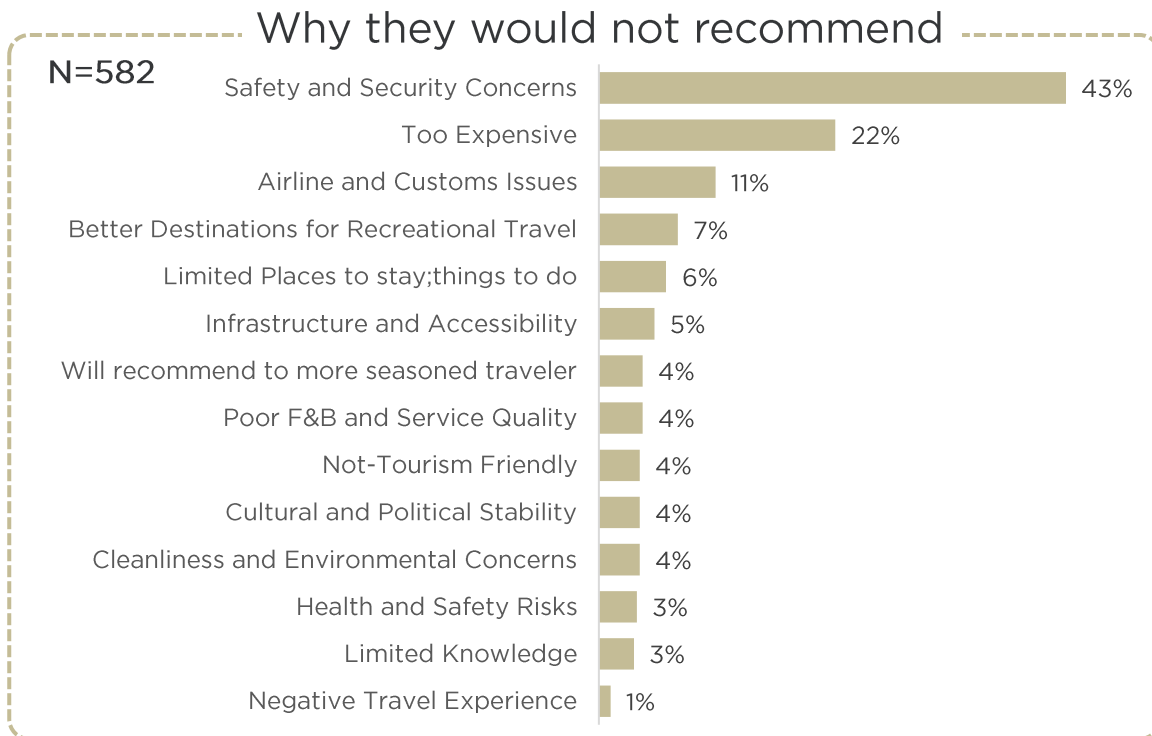
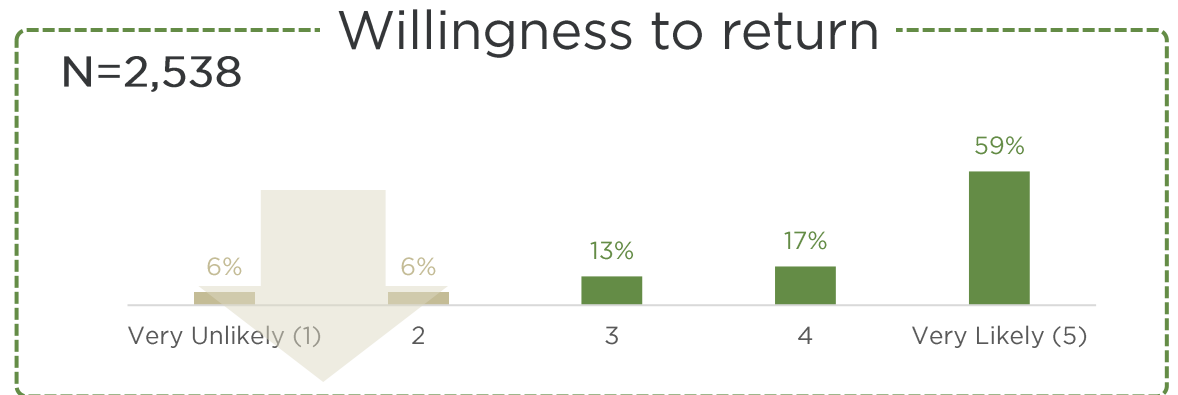
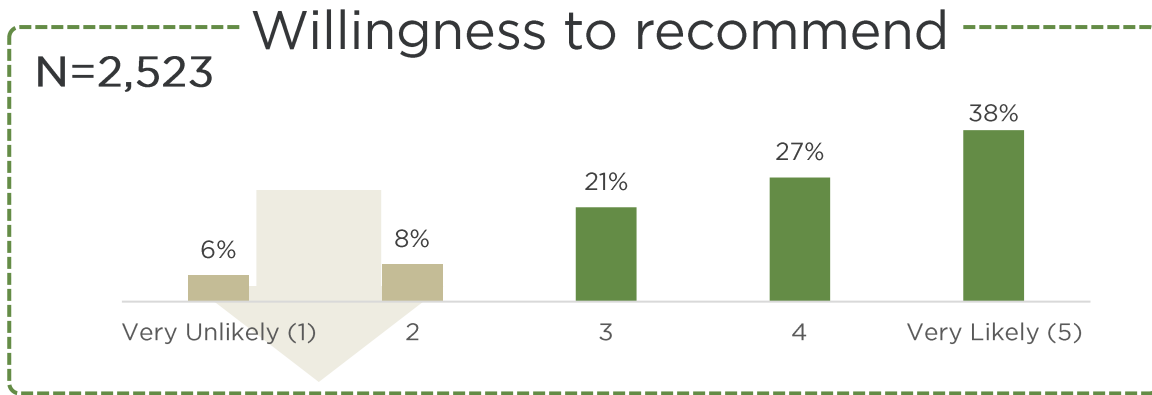
Suggestions for Improvement

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

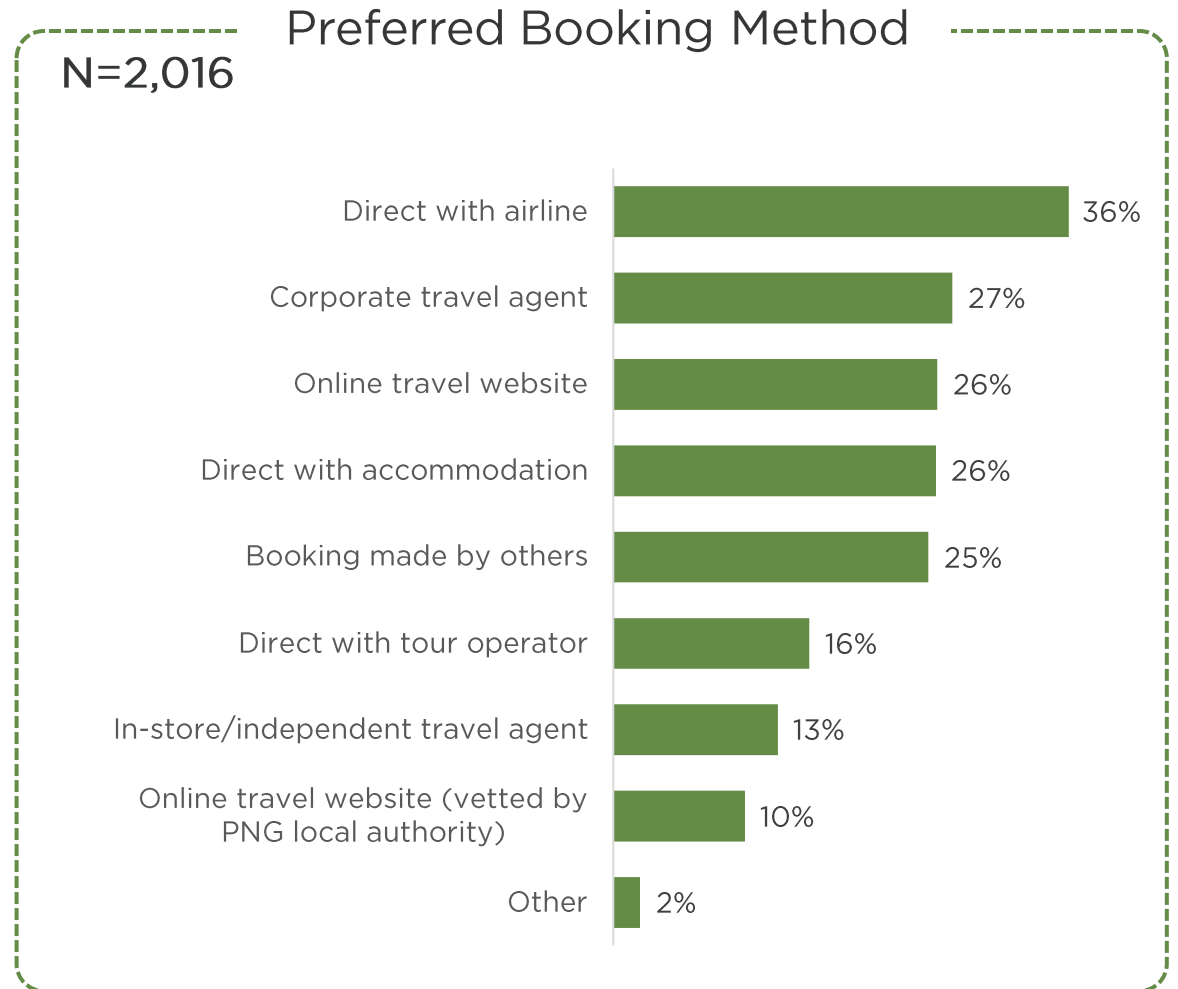
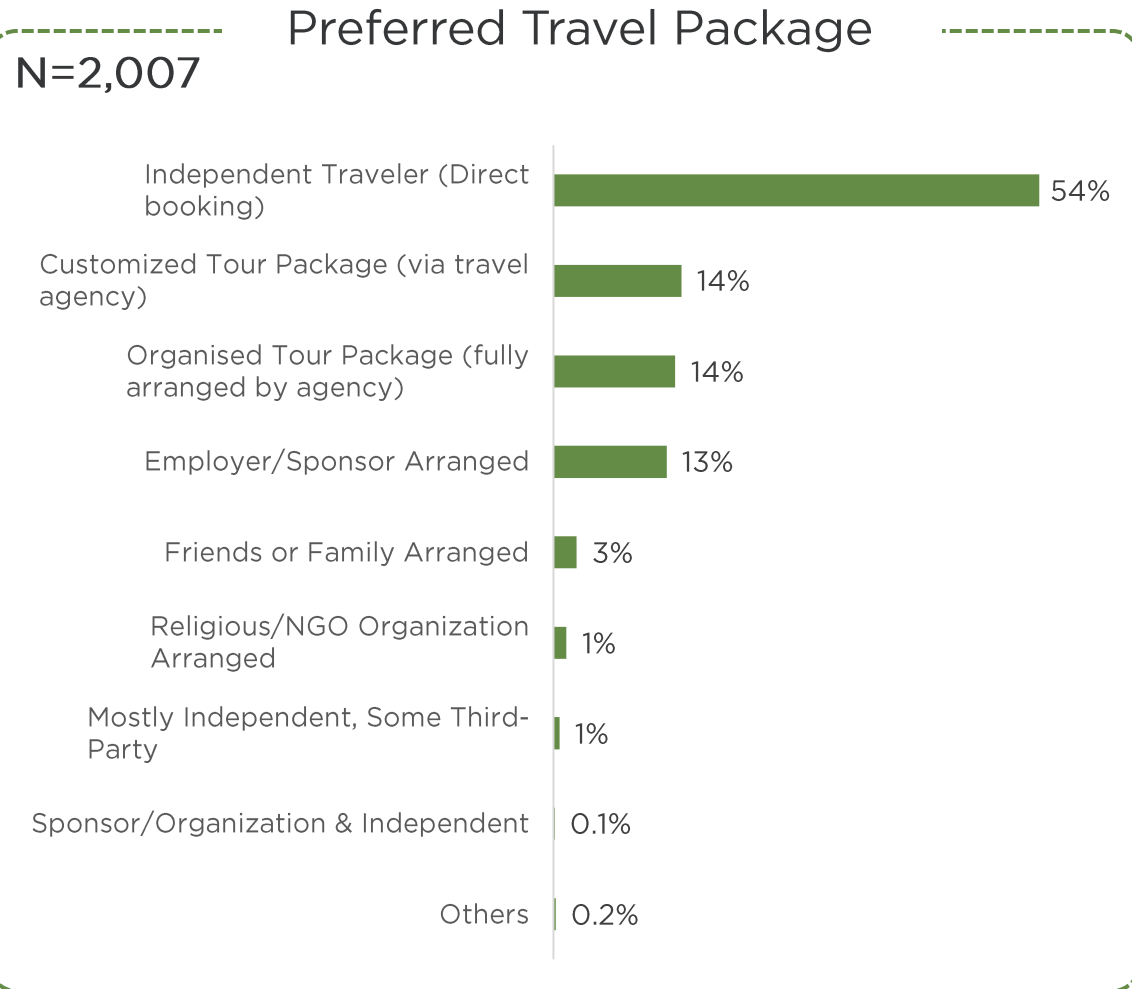


Share of Respondent Comments

Future Travel Intentions



Willingness to Return – Next Trip to PNG



For their next trip to Papua New Guinea, 54% of respondents plan to book independently, while 28% will rely on organized packages (14% organized by a travel agency, 14% customized via a travel agency). Thirteen percent will have their travel arranged by their employer or sponsor, and smaller groups depend on family/friends (3%) or religious/NGO organizations (1%). Regarding booking methods, 36% will book directly with airlines, 26% with accommodations, and 26% via online travel websites. Corporate travel agents are used by 27%, while 16% will book with tour operators. Additionally, 25% will have others handle their bookings, and 10% will use locally-vetted online travel websites.



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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 the Papua New Guinea Tourism Promotion Authority and the New Zealand Government.

For any queries regarding this report please contact the SPTO Manager Research and Statistics Mr. Prashil Parkas pparkas@spto.org or SPTO Senior Research Officer, Mr. Rovarovaivalu Vesikula rvesikula@spto.org

Photo Credit: David Kirkland