



Papua New Guinea

INTERNATIONAL VISITOR SURVEY

June 2022 – May 2023



AUT

Background

- IVS data from June 2022 to May 2023 is analysed to help us understand the visitor experience and gain insights into tourism recovery in Papua New Guinea after the border reopening.
- Report includes key sections of visitor profile and characteristics, decision-making, spending, and satisfaction.
- NB All analyses are weighted to arrival data (Jun 2022 – May 2023) by sourcing market.
- All reports from the IVS are available at [Pacific Tourism Data Initiative Resource Page](#)

Respondents (June 2022 to May 2023)

RESPONSES RATE



11,831

TOTAL NUMBER OF EMAILS SENT



1,227

TOTAL NUMBER OF RESPONSES

10.4%
CONVERSION
RATE

RESPONSES COVER



1,350

ADULTS

102

CHILDREN

3.1%
OF ALL VISITORS
DURING THE
PERIOD

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

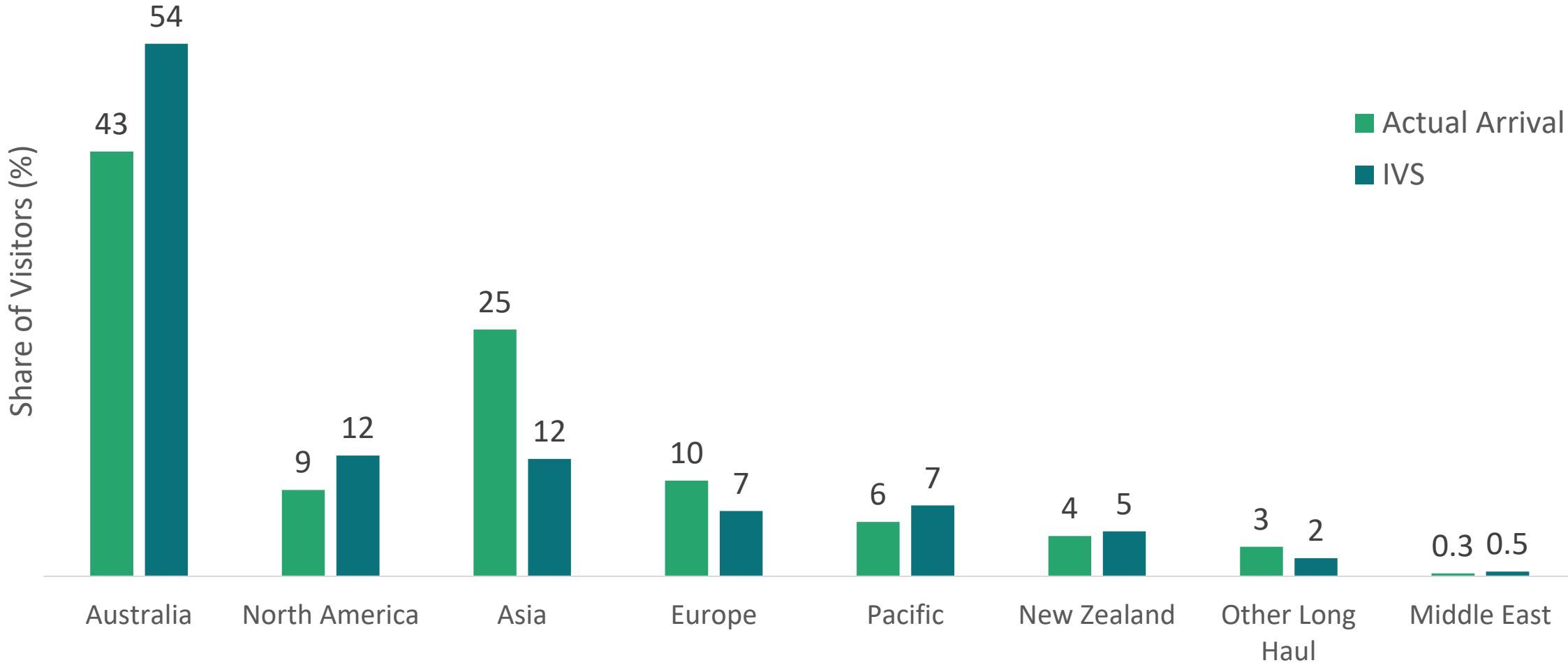


Visitor Spending
and Impact



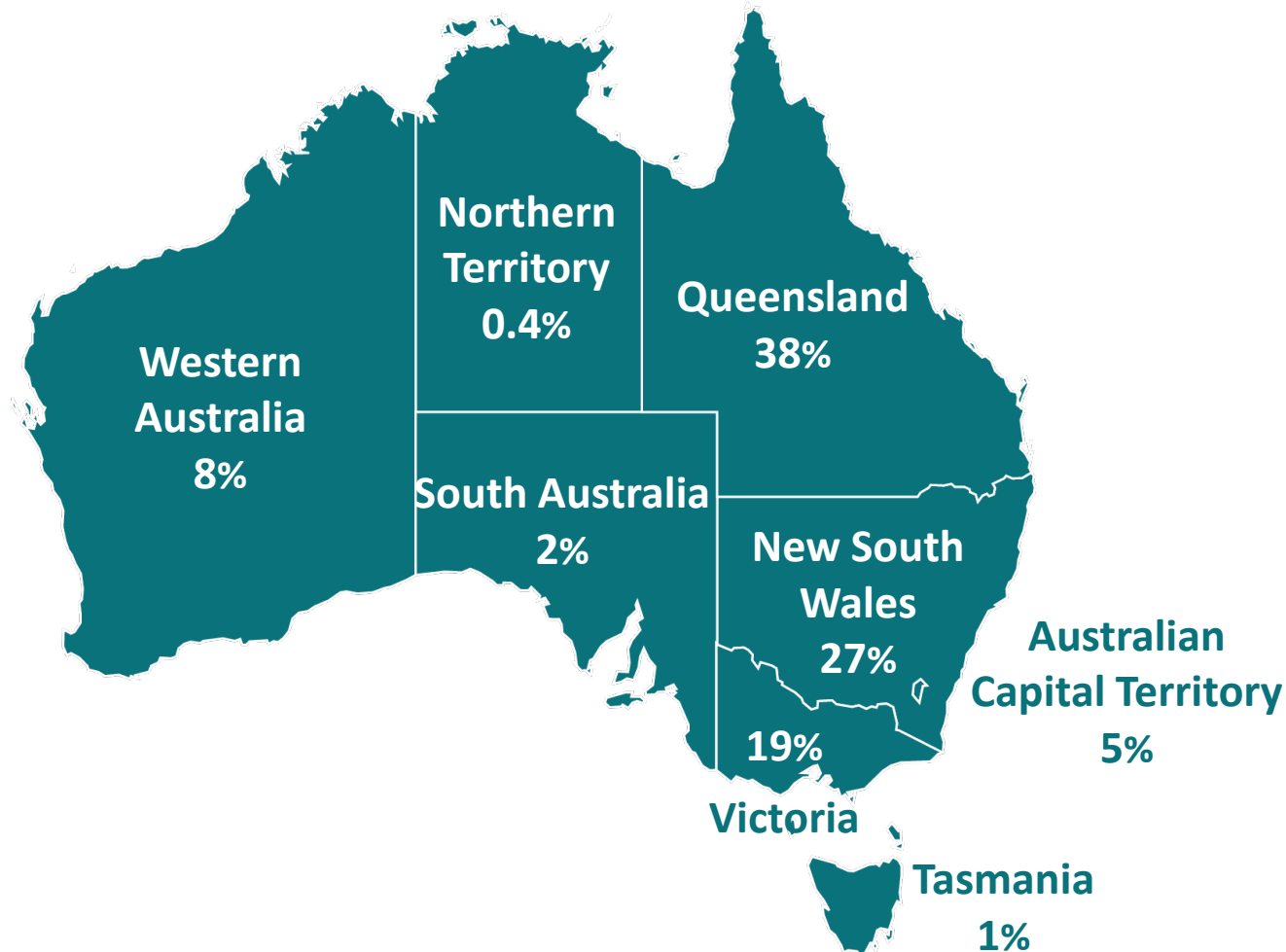
Visitor
Satisfaction

Country of origin: Actual arrival vs. IVS respondents



Australian respondents - IVS data Jun2022 - May2023

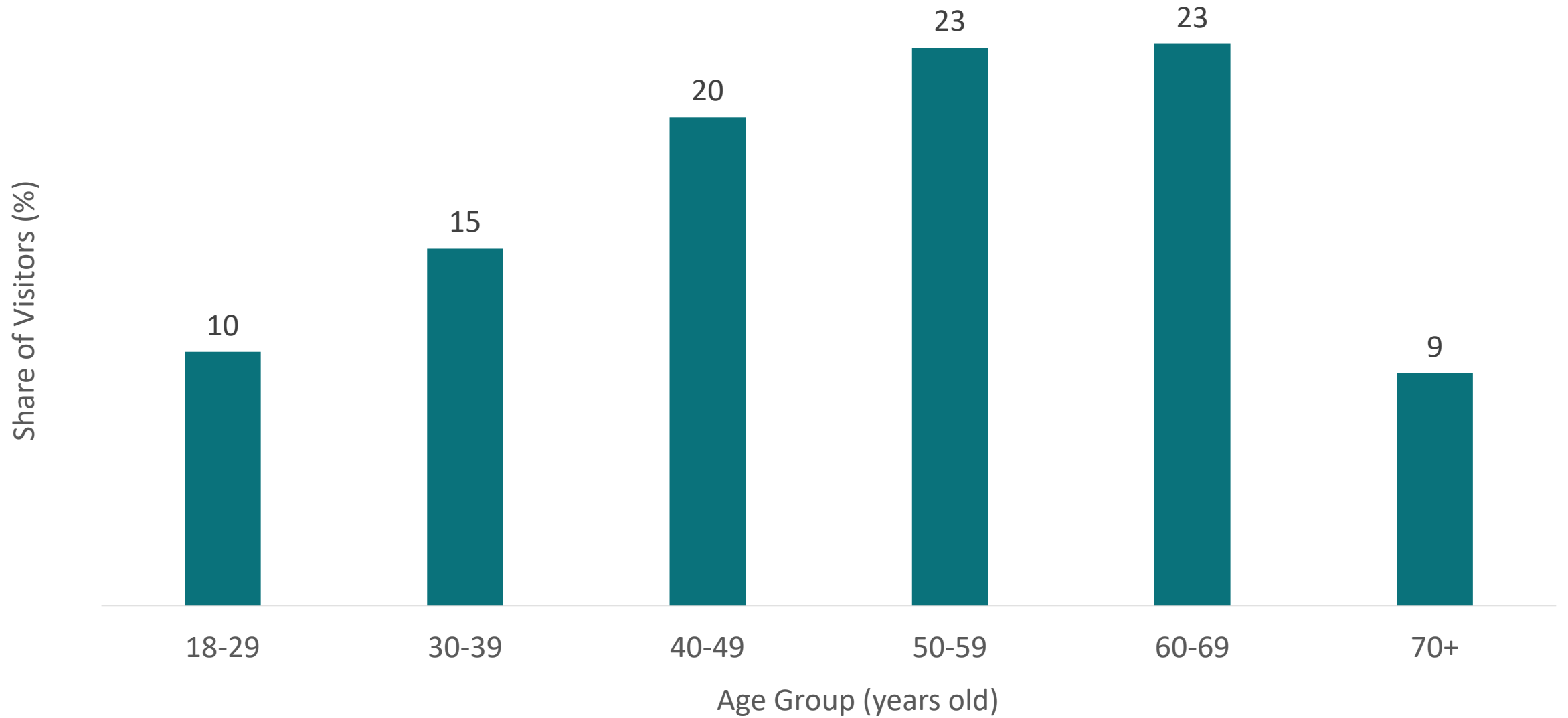
TOTAL
554
AU VISITORS



New South Wales, Queensland and Victoria make up **84%** of all Australian visitor arrivals

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

Age groups



Gender groups

Males
67%

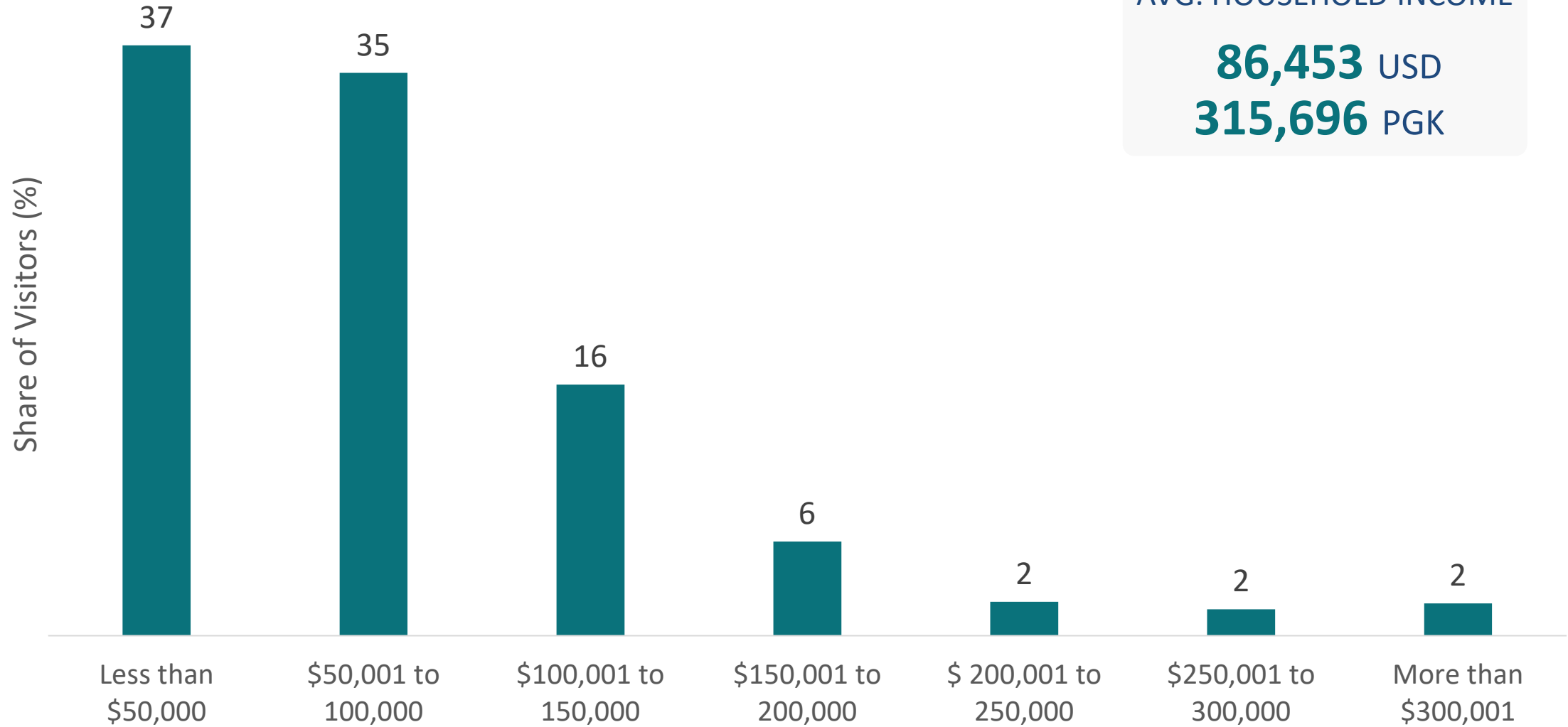


Females
33%

Note: Total number of valid responses for gender is 1,004.

Annual household income

AVG. HOUSEHOLD INCOME
86,453 USD
315,696 PGK



Note: Percentage figures are rounded. Currency in US dollars.

Report Structure



Methodology
& Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

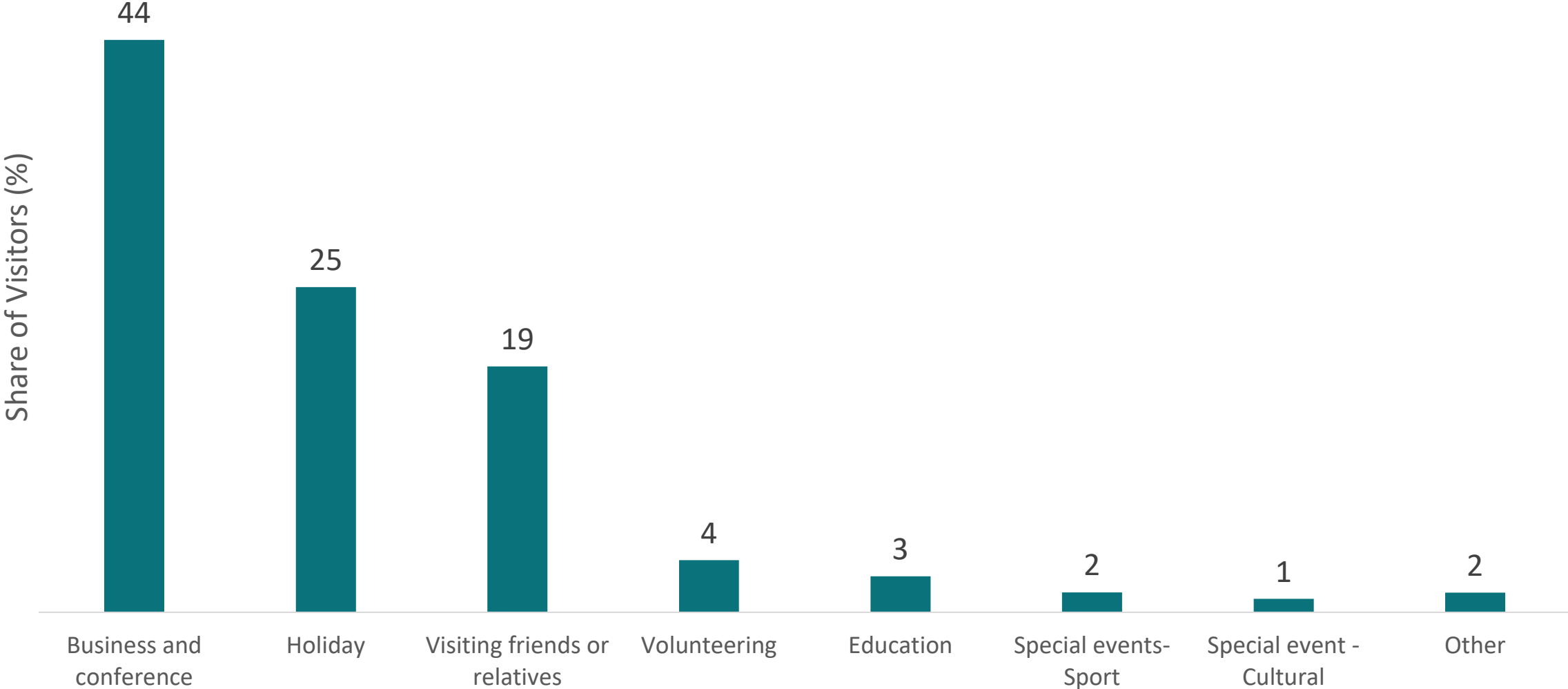


Visitor Spending
and Impact

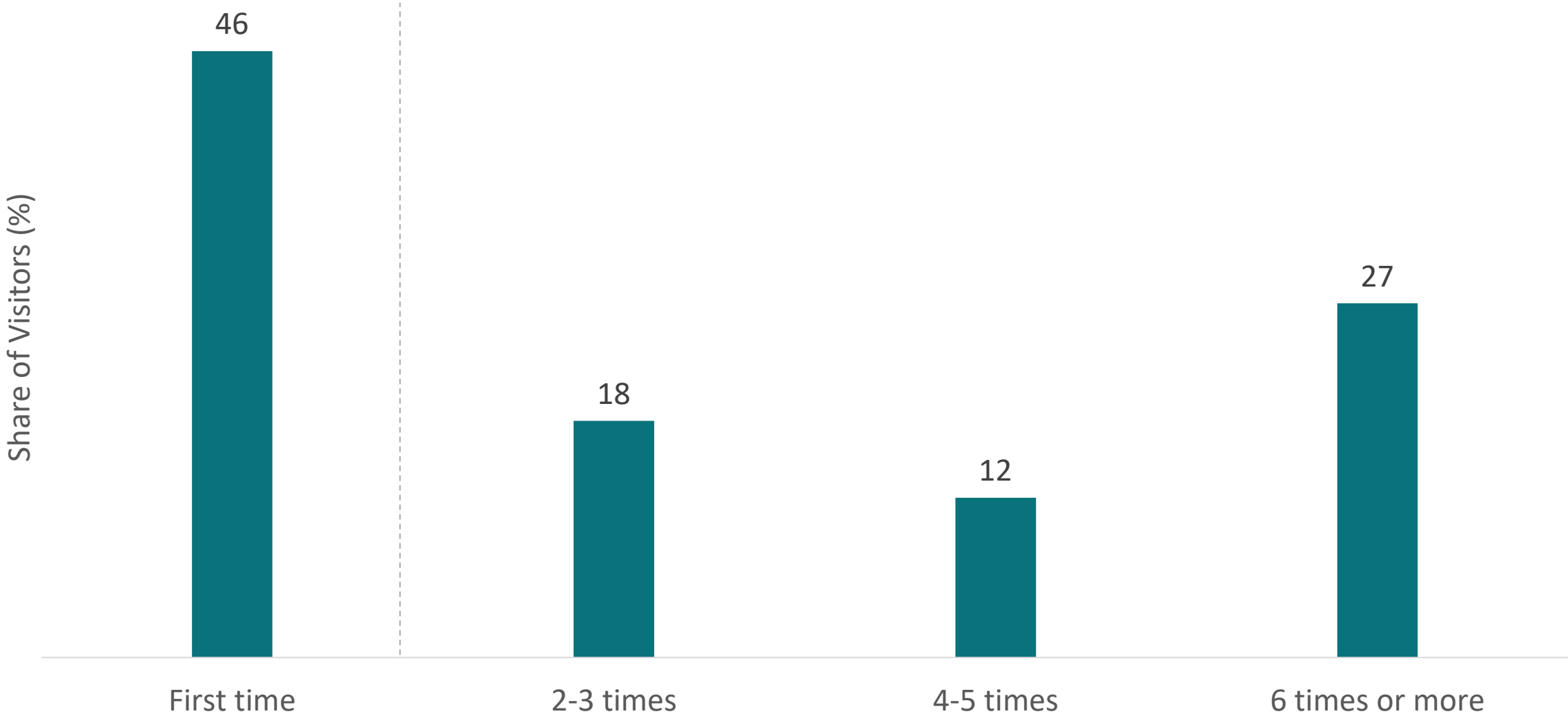


Visitor
Satisfaction

Purpose of visit



Previous visits

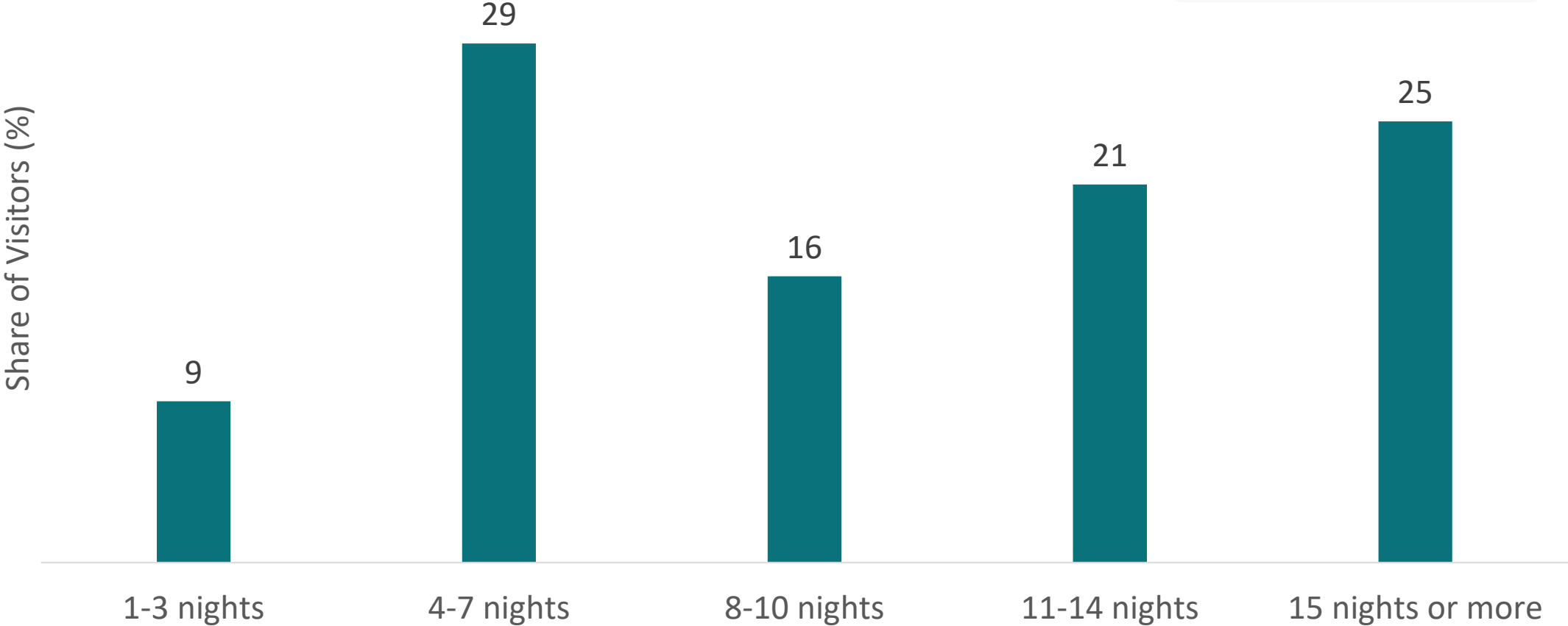


Length of stay

AVG. LENGTH OF STAY

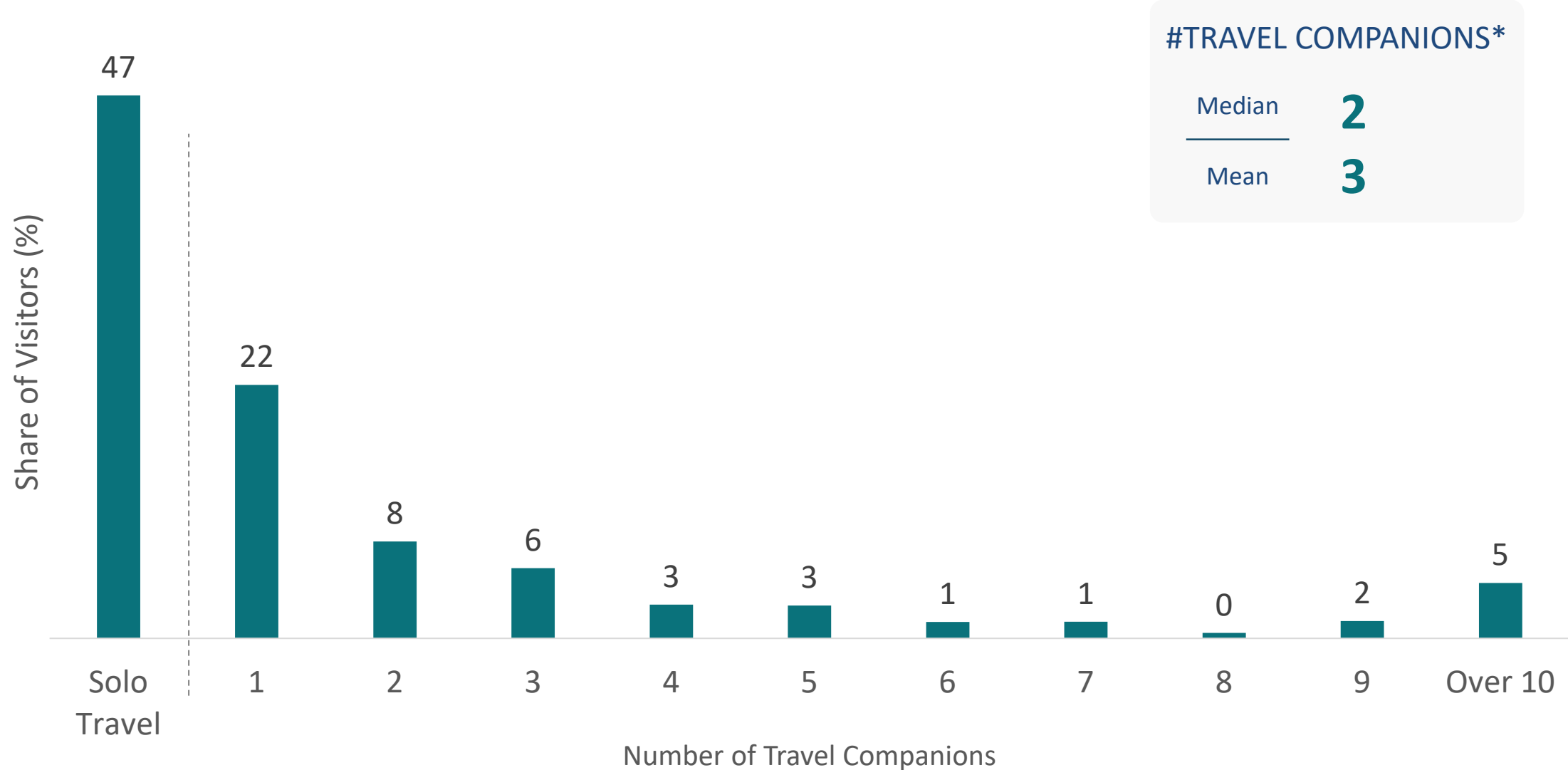
11.4

NIGHTS



Note: 30 and 30+ days as outliers were removed for length of stay analysis

Travel group size



Note: Median and mean statistics of travel companions are based on visitors who travel with companions N=543; Percentage figures are rounded.

Airlines used for travel



70%



2%



29%



1%

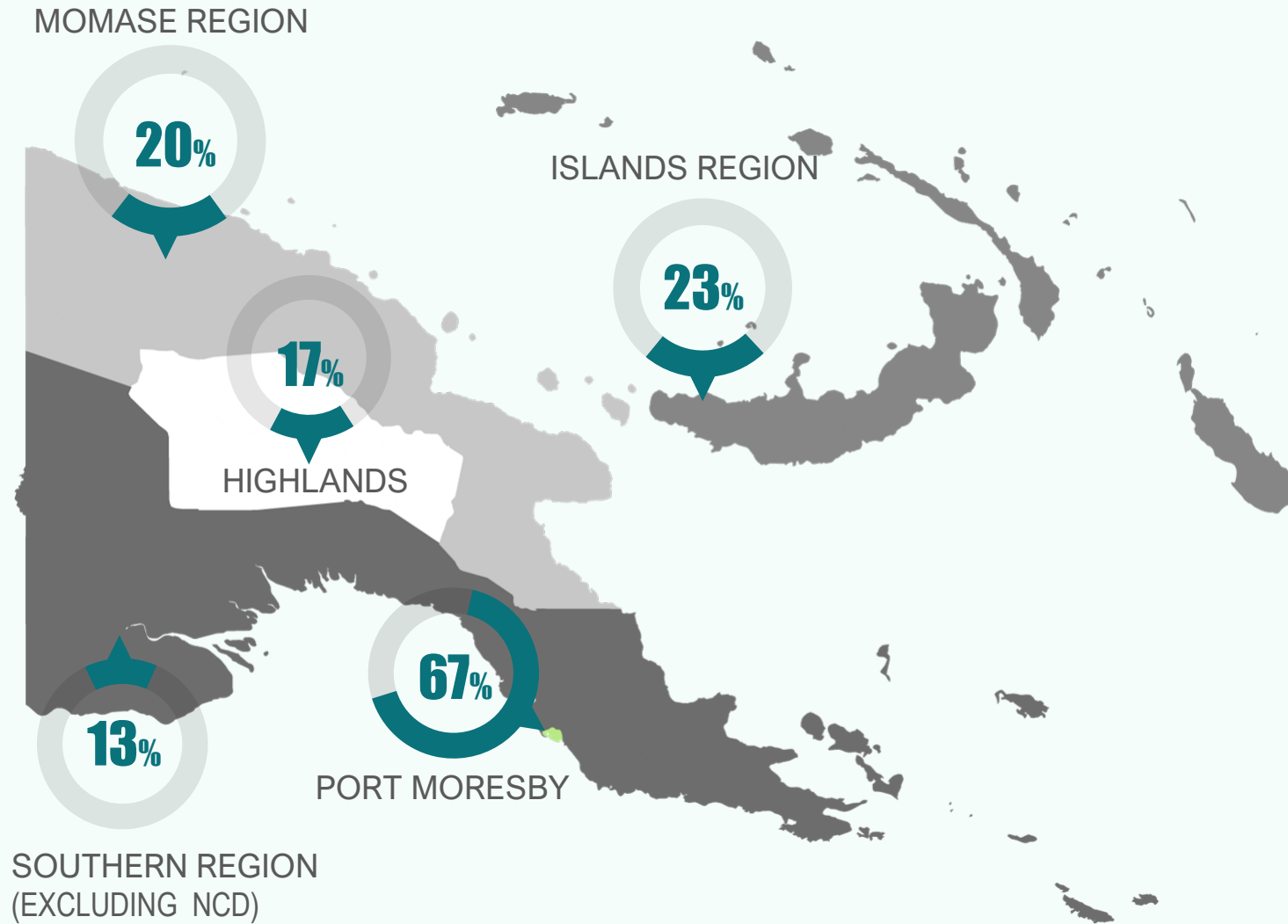


9%

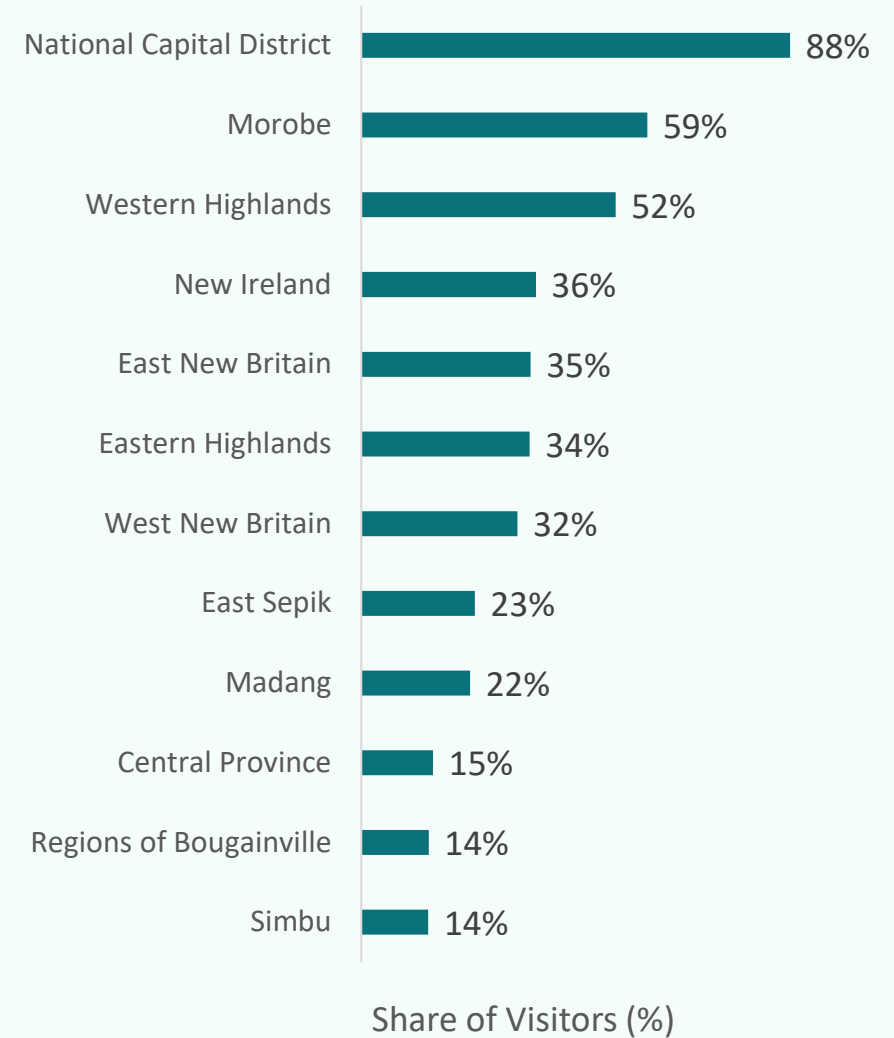
Others
(Singapore Airlines,
Qatar Airlines, etc)

4%

Islands visited



ISLANDS VISITED TOP 12



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

Report Structure



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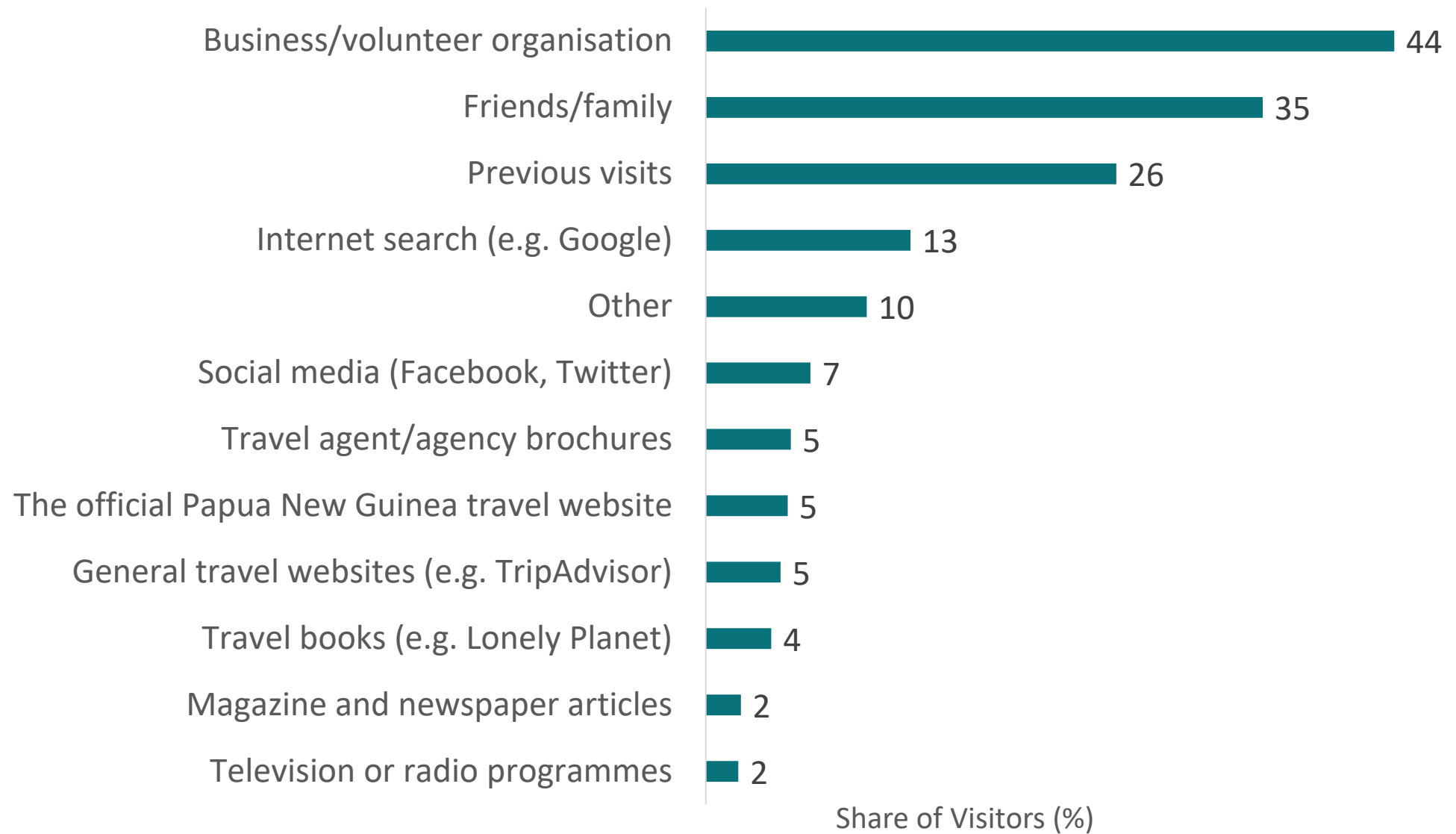


Visitor Spending
and Impact



Visitor
Satisfaction

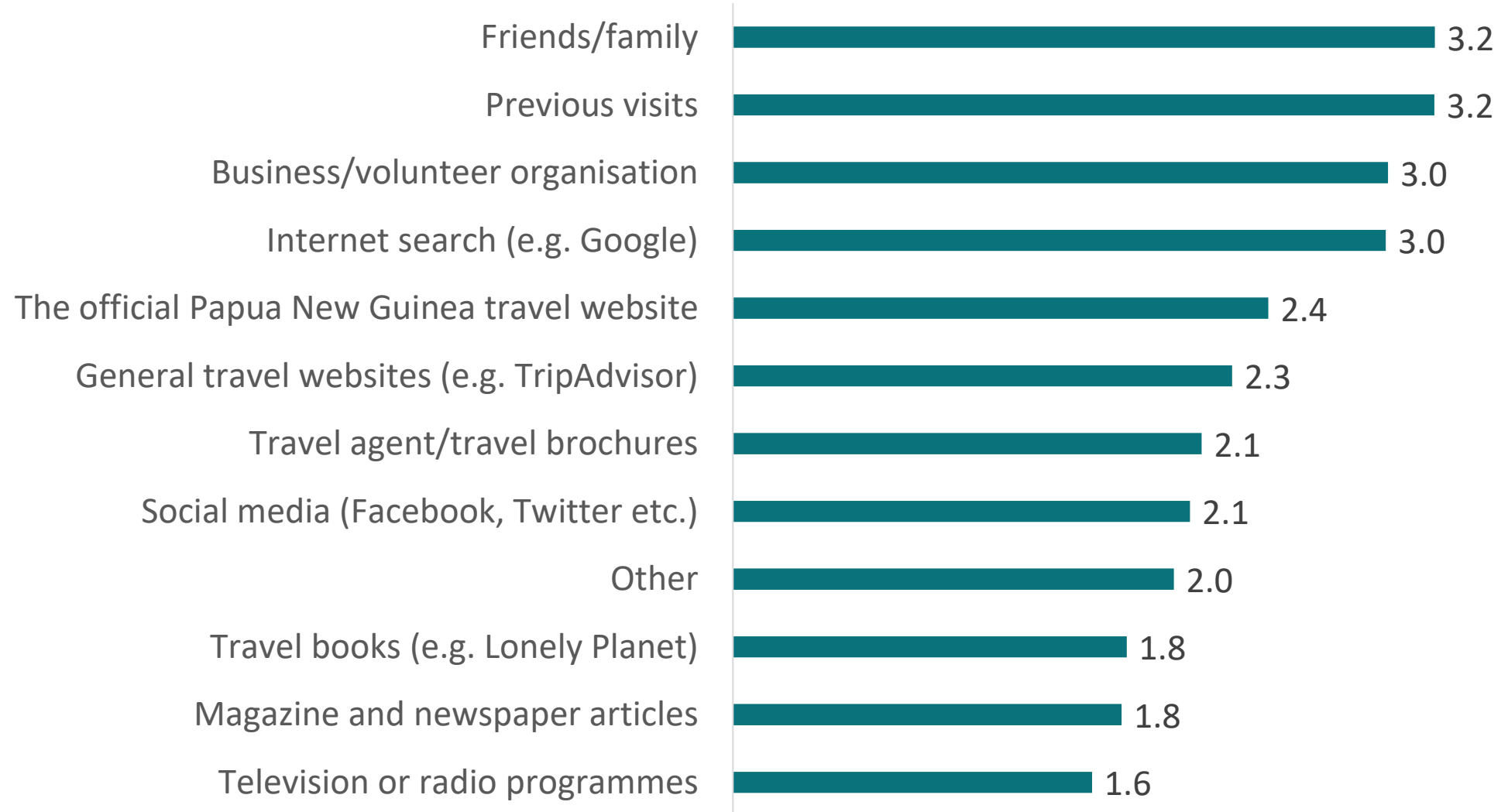
Q How did you find out about PNG as a destination?



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

Q

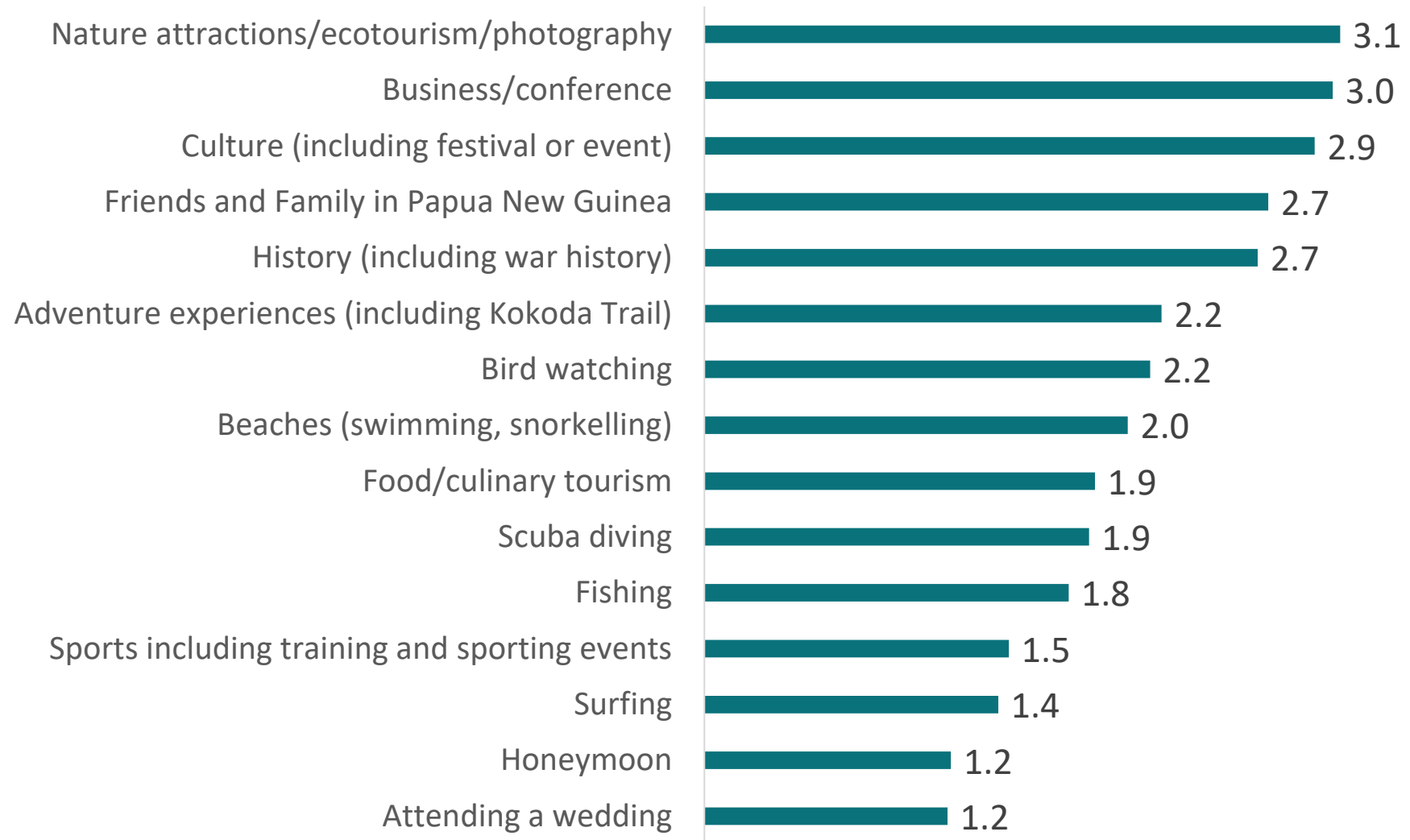
How important were the information source when planning your trip?



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



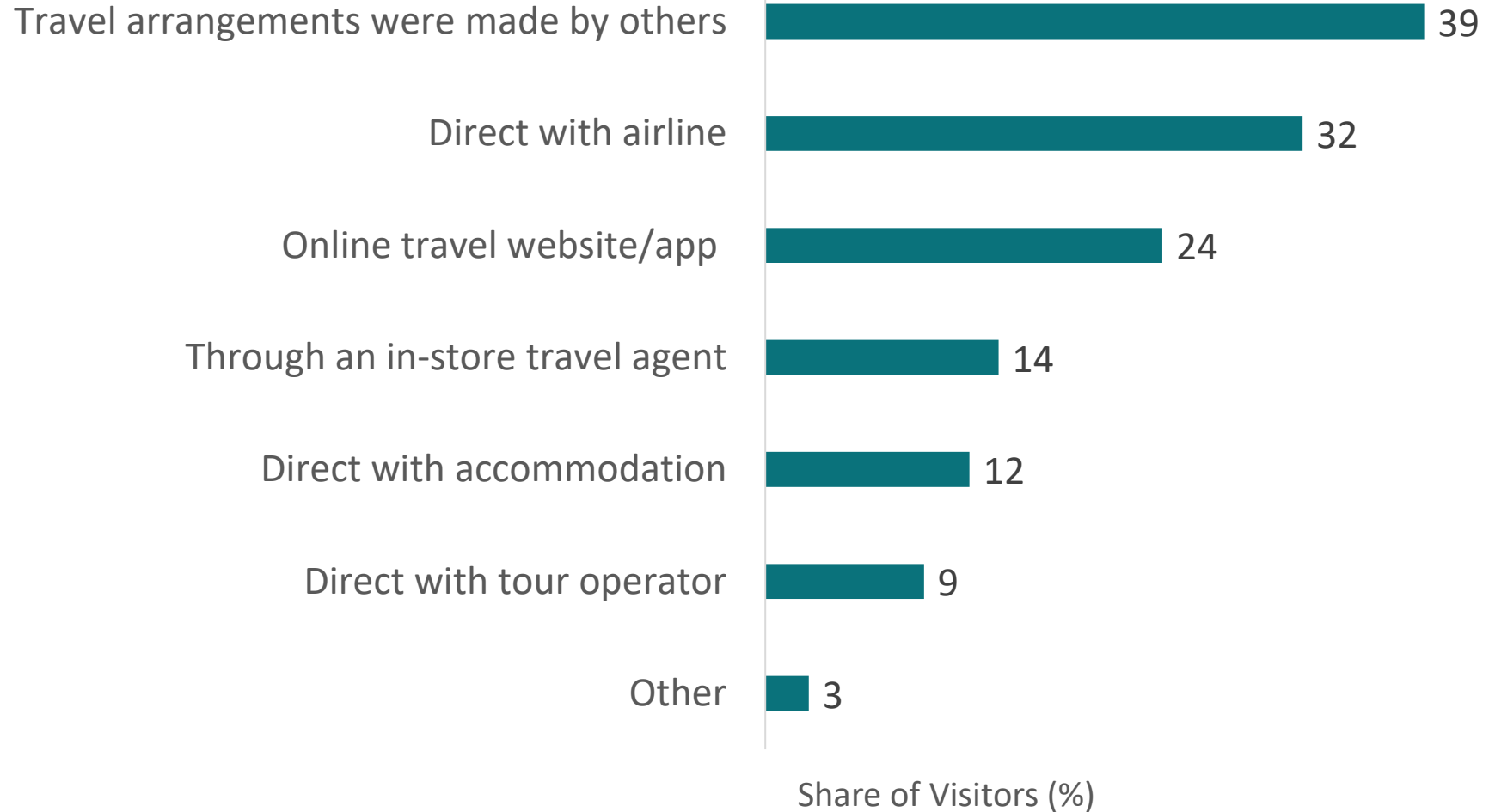
Influential factors in travel to PNG



Scales: 1=No influence to 5=Primary reason to visit

Q

How did you purchase your travel?

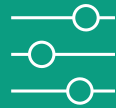


Note: Multiple responses, therefore total does not add up to 100%

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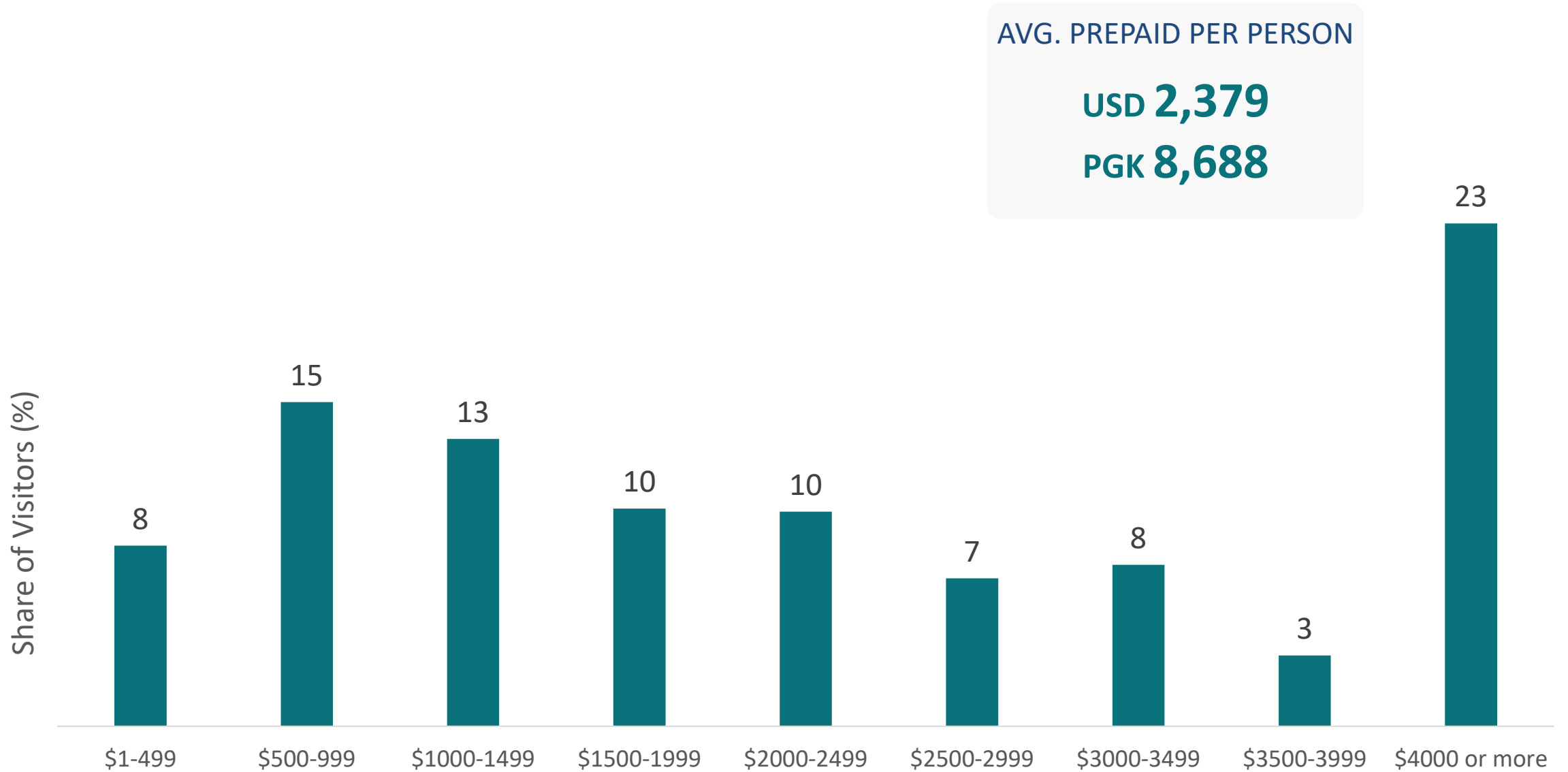


Visitor Spending
and Impact



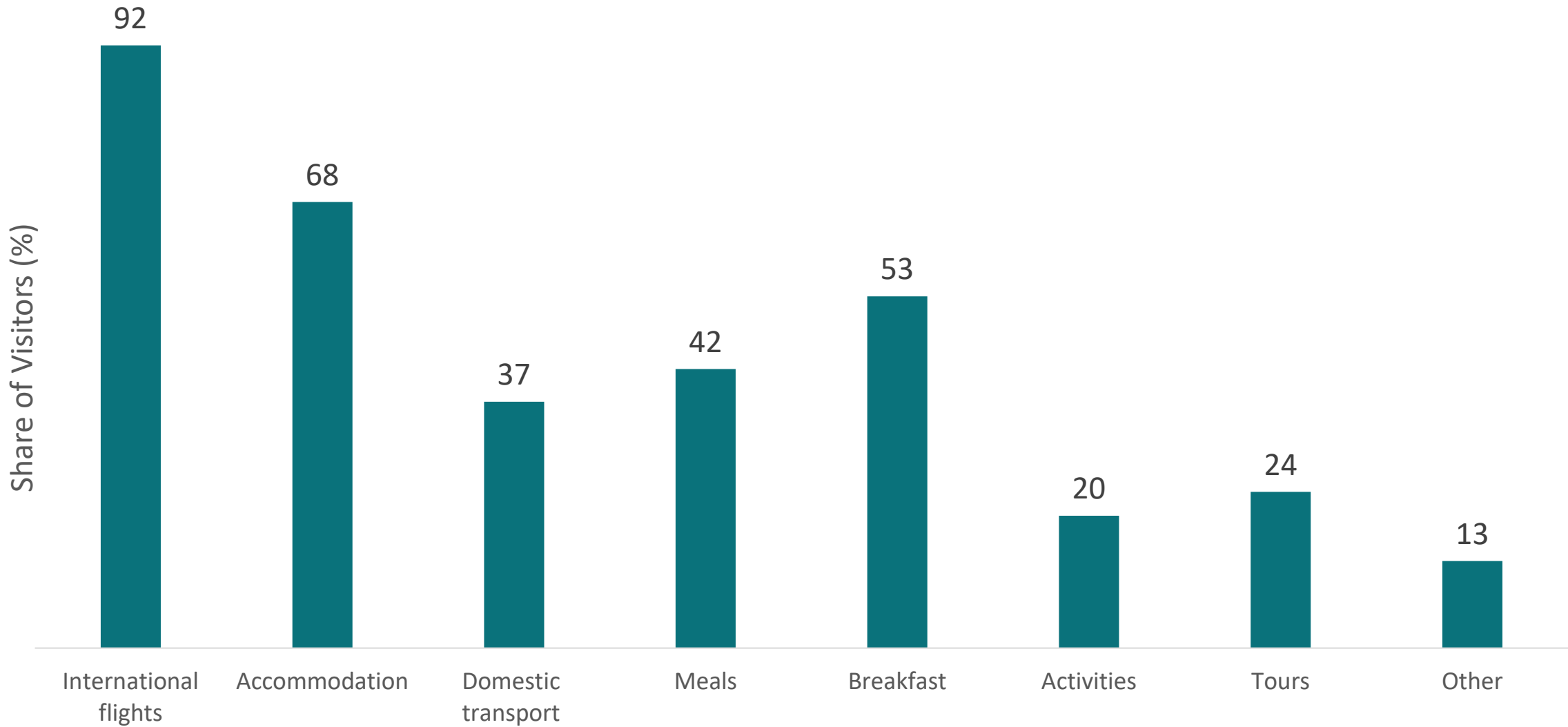
Visitor
Satisfaction

Prepaid expenditure per person



Note: Percentage figures are rounded. The average exchange rate from USD to PGK for the period June 2022 to May 2023 was applied.

Prepaid expenditure includes



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

In-country spend per person per day

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>USD</u>	<u>PGK</u>
Accommodation	40	35	126
Food & Beverage	20	17	64
Domestic Travel	10	9	33
Retail	9	8	28
Tour	6	5	18
Souvenir	4	4	13
Other	4	3	13
Local Transport	4	3	12
Internet & Service	3	2	8
TOTAL	100	86	316

Note: The average exchange rate from USD to PGK for the period June 2022 to May 2023 was applied.

Economic impact – Per person and total

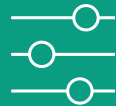
	Visitor Expenditure Per Person & Total	
	USD	PGK
Average Spend Prior to arrival		
Per Person Per Trip	2,379	8,688
<i>Flowing into local economy rate – estimated</i>	<i>65%</i>	
Per Person Per Trip	1,547	5,648
Per Person per Day	135	494
<hr/>		
Average Local Spend		
<i>Length of Study (nights) - mean</i>	<i>11.4 nights</i>	
Per Person Per Trip	988	3,610
Per Person per Day	86	316
<hr/>		
Total Economic Impact-Per Trip	2,535	9,258
Total Economic Impact-Per Day	221	810

Note: The average exchange rate from USD to PGK for the period June 2022 to May 2023 was applied.

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Decision Making

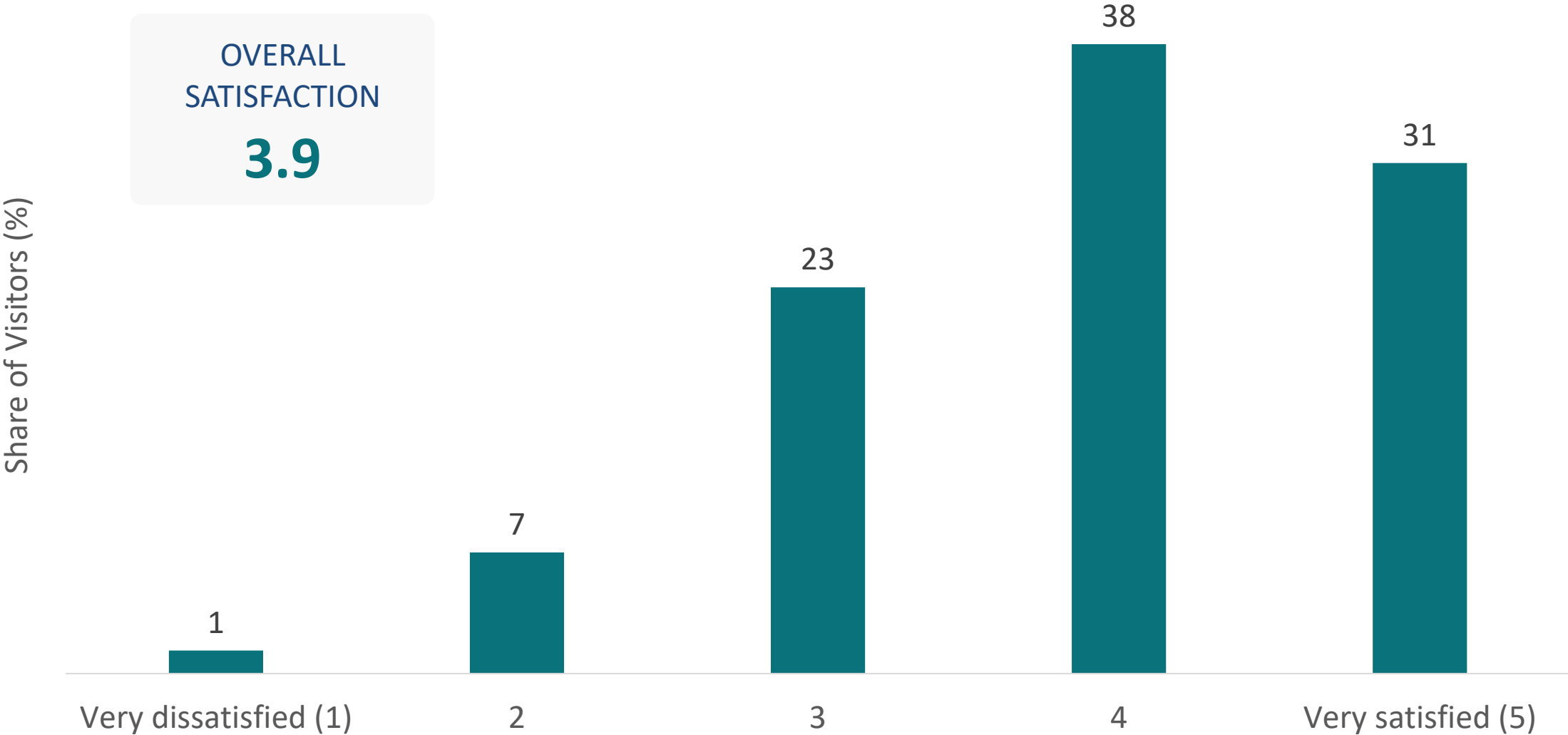


Visitor Spending
and Impact

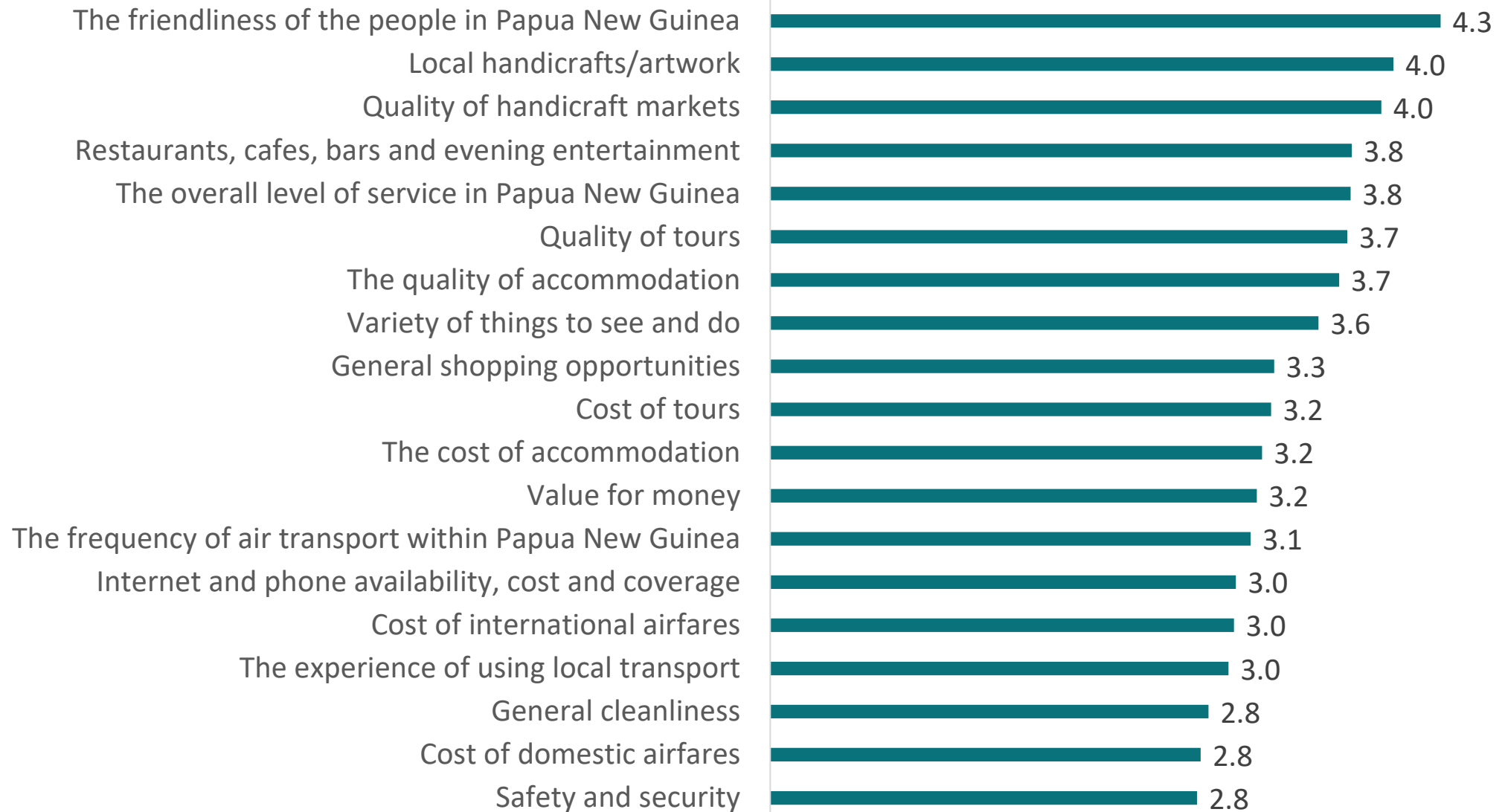


Visitor
Satisfaction

Visitor overall satisfaction



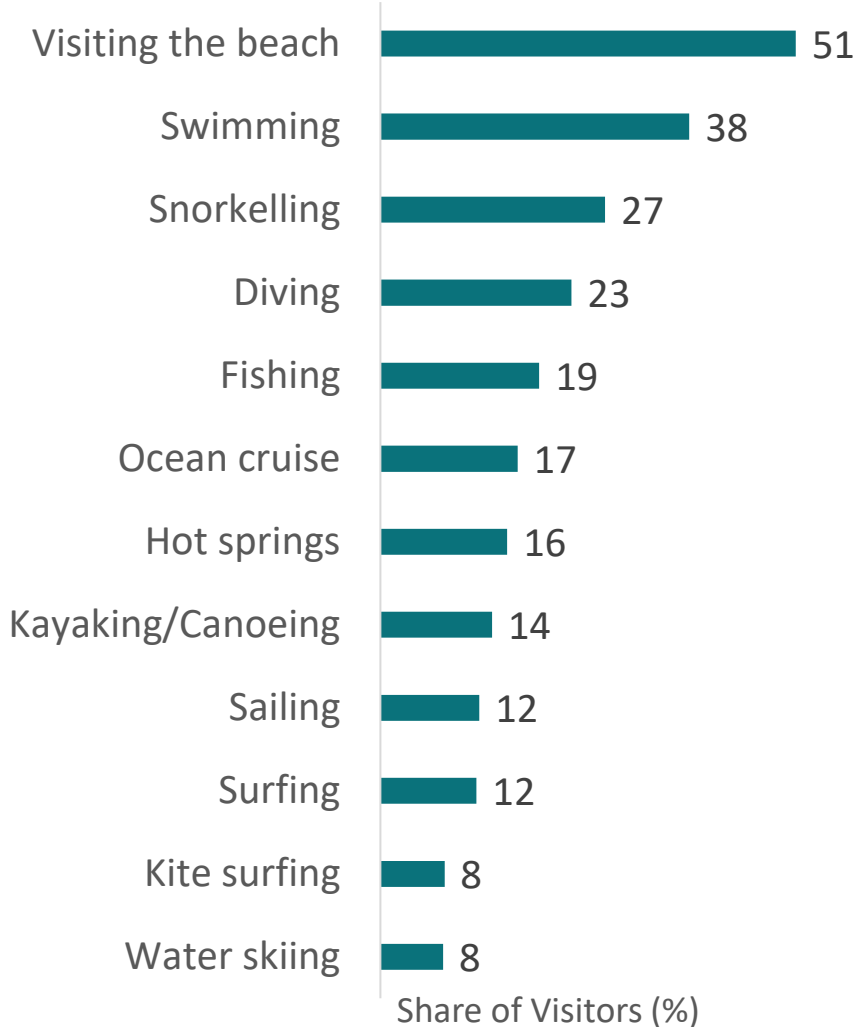
Satisfaction with travel experience



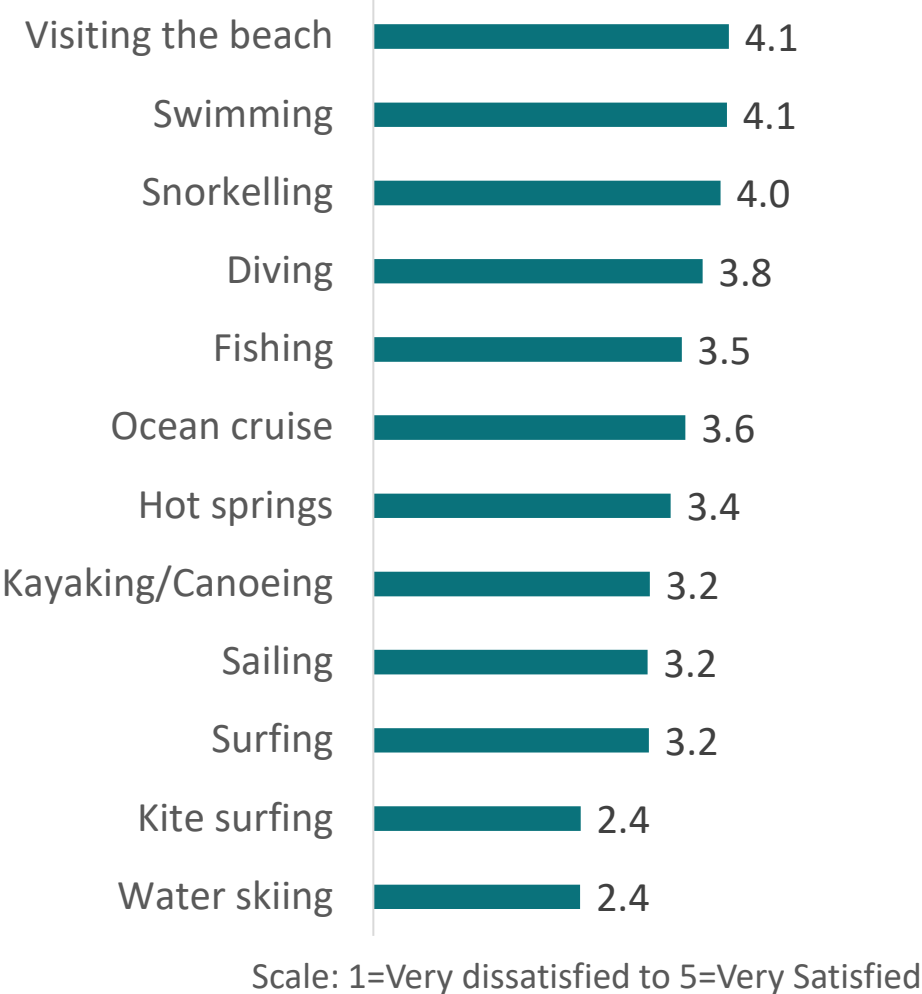
Scale: 1=Very Dissatisfied to 5= Very Satisfied

Water-based activities

Participation Rate



Satisfaction



Cultural-interactions

Participation Rate



Share of Visitors (%)

Satisfaction



Scale: 1=Very dissatisfied to 5=Very Satisfied

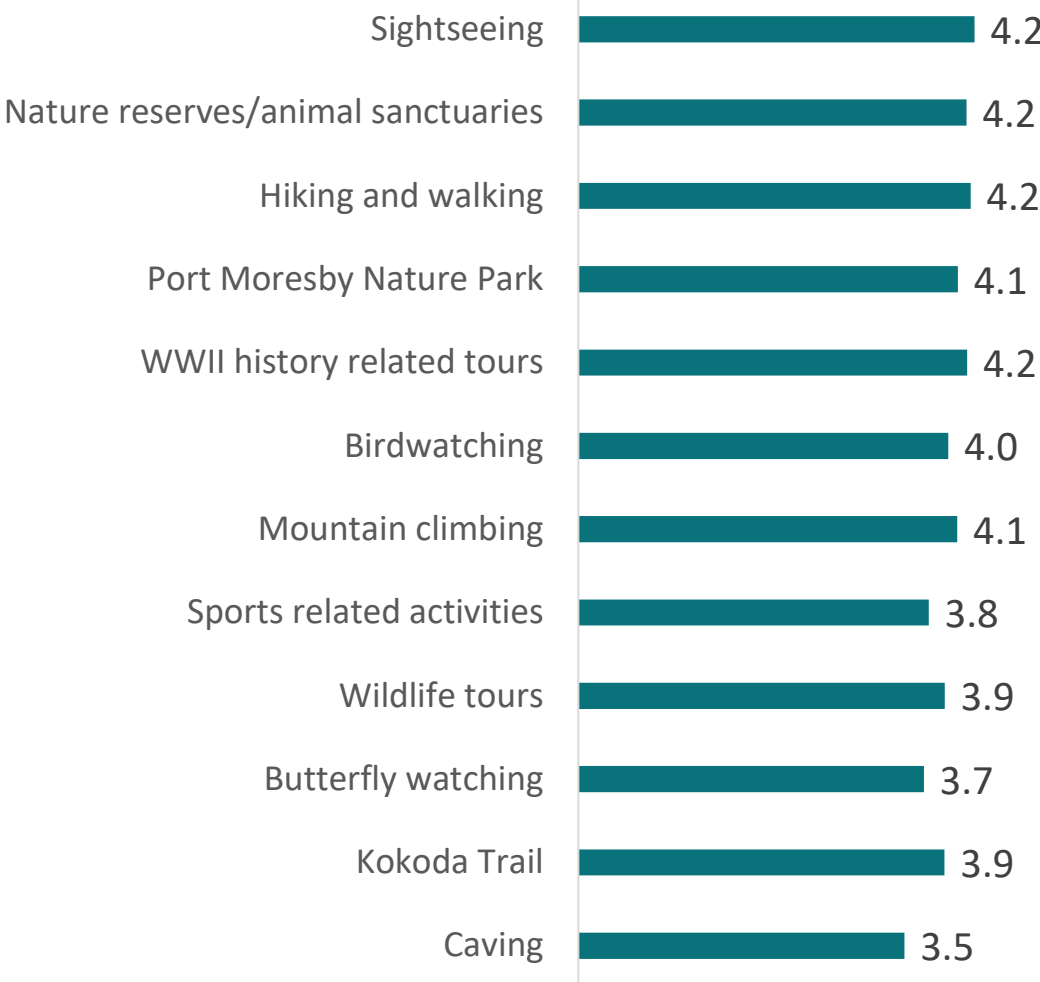
Land-based activates

Participation Rate



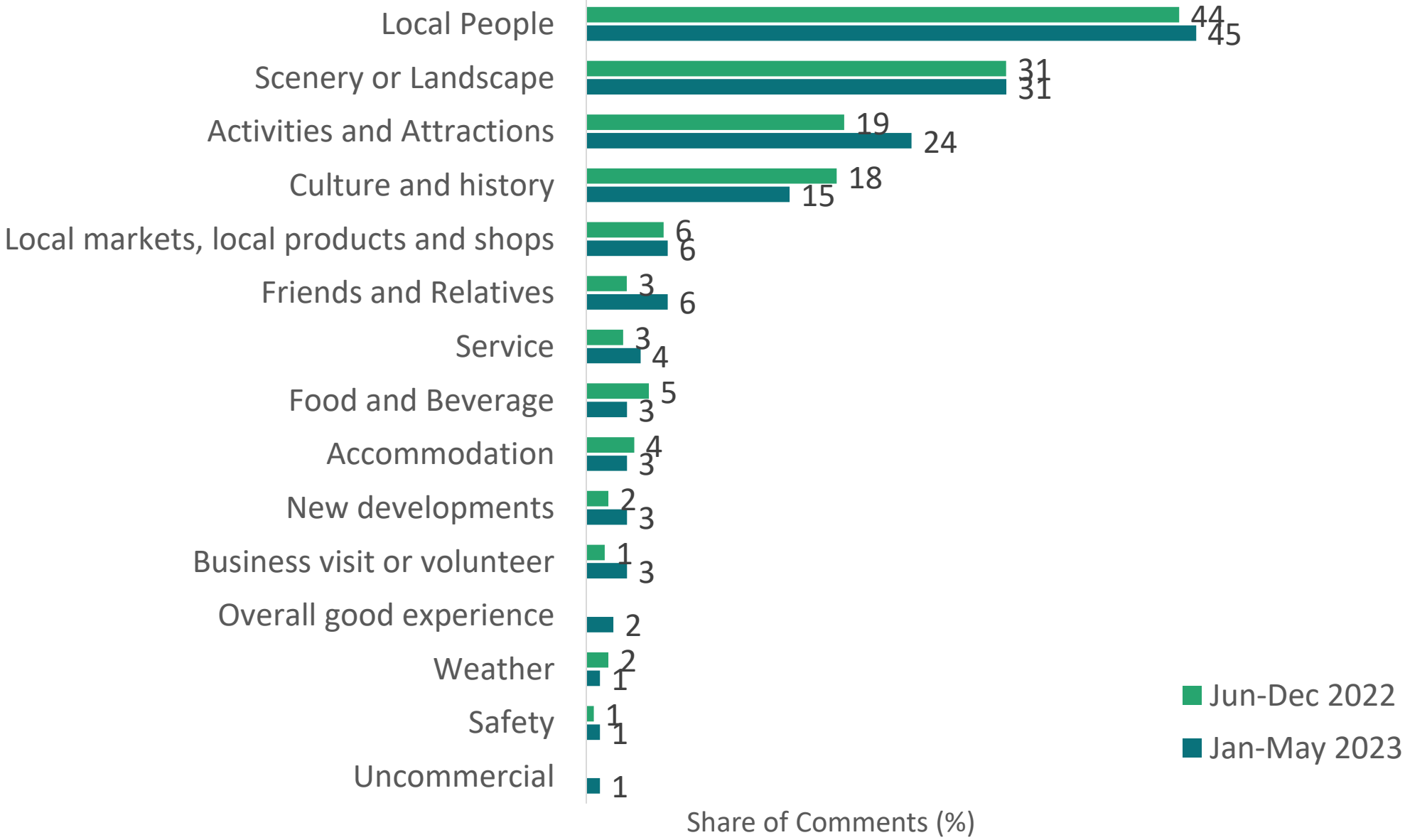
Share of Visitors (%)

Satisfaction



Scale: 1=Very dissatisfied to 5=Very Satisfied

Most appealing aspects



Note: Qualitative analysis, the responses can add to more than 100%. Total responses for Jun-Dec 2022 N=368, Jan-May 2023 N=419

Most appealing aspects: Local People



45%

Share of
comments

- + Local people and their willingness to talk about their culture.
- + The Papua New Guinean people - nicest people in the world!
- + The service and friendliness of the people when walking through the trail. They always waved, offered high fives and were in general very nice and caring people.
- + The people and the land. Friendly, engaging people that overall were helpful. Amazing coastline and forests!
- + Lovely friendly warm-hearted people, some no-go areas, but took good local advice and security staff with us.
- + The people in the highland villages and the Kokoda trail carriers who were diligent in the execution of their responsibility to trekkers.
- + Genuine friendliness and inquisitiveness of people in where I was from and what I was doing here, regardless of who I met, such as people providing services (taxi drivers, hotel attendants, people serving food).

Most appealing aspects: Scenery and landscape



31%
Share of
comments

- + The untouched nature of where I stayed plus the friendliness of the people.
- + Uncrowned surf, clean waves, access to surfing opportunities close to Australia.
- + The natural surroundings are truly beautiful - the beaches, rivers and forests.
- + Most attractive things are no pollution, good beaches & awesome scenic beauty of nature.
- + The landscapes, nature and culture. The slow paced and healthy island lifestyle. Opportunities for surfing, hikes, snorkelling, nature and local interactions.
- + Diving on reefs off Kimbe New Britain was amazing with limited pollution in the form of plastic and general waste in the outer ocean.
- + The natural sights are amazing. Scuba diving was wonderful, and I would come back to do more nature walks and bird watching.
- + Pristine clear water, good snorkeling, interesting and very different culture.
- + ...Having lived in PNG for many years & returned often, i was greatly encouraged by the cleanliness of the Port Moresby environs, compared to previous visits years ago.

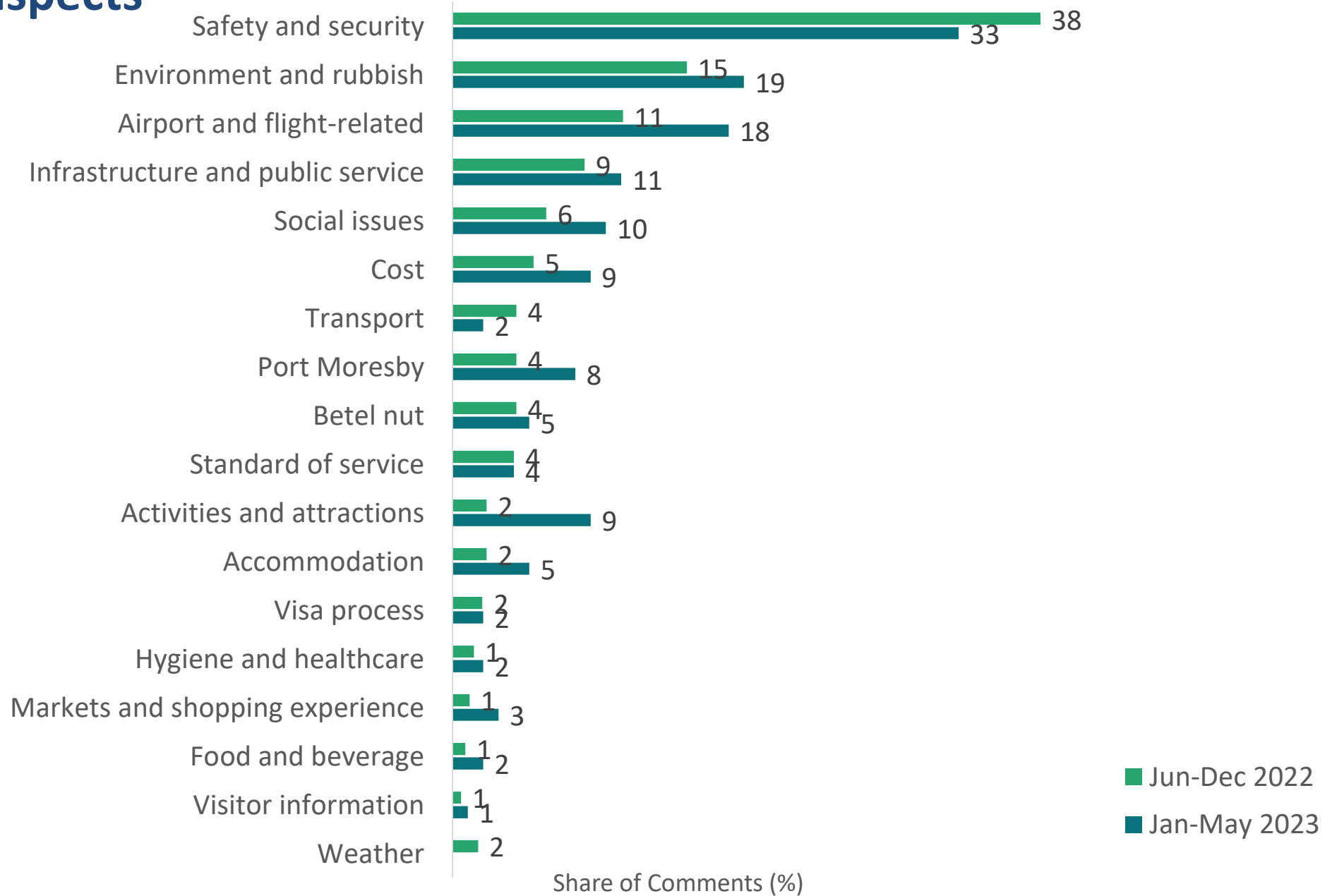
Most appealing aspects: Activities and attractions



24%
Share of
comments

- + The surfing and snorkelling were amazing. It's an untouched paradise.
- + ...The visit and introduction to the community around the Panguna mine site (I worked at the mine during the 1970's).
- + The beautiful people, the lush surrounds and the history of the Kokoda track was overwhelming.
- + Lots! The Hiri Moale Festival, my time boating, shopping the local wares and visiting the museum.
- + I loved working with the local teams and swimming with the dolphins at Kokopo.
- + The adventure of travelling to remote island areas to surf, scuba dive and fish. Interacting with the local people.
- + People are very friendly. Scuba diving in Kimbe Bay was good. Our cultural and village tours in the Highlands were wonderful!
- + The quality of remaining forests within the country - please do not allow indiscriminate logging of your forests. The quality of the wildlife that use the forest habitat is amazing and will bring in so many tourists.
- + PNG culture and traditions are very attractive all around, with the coastal villages where I spent most of days was beautiful beaches, friendly people you meet along the roadside markets and sharing a big feast Meal with the family.

Least appealing aspects



Note: Qualitative analysis, the responses can add to more than 100%. Total responses for Jun-Dec 2022 N=360, Jan-May 2023 N=402.

Least appealing aspects: Safety and security



- + The security, not really safe for tourist specially at night.
- + People fighting all the time, not being safe to walk around on my own, streets not being clean.
- + Personal security, unable to walk streets safely, Unadvised to safely drive around and visit sites without a guide.
- + I could not visit the beach in Port Moresby as the area is unsafe. I felt very unsafe travelling around Port Moresby itself.
- + Least attractive. Poor infrastructure and security. There are daily electricity and water outages. The roads are full of potholes. There is lots of rubbish around the city. There are lots of beggars on the streets.
- + Some security concerns in areas like Port Moresby. Lack of upkeep and maintenance of shoreline facilities and infrastructure (park and WWII monument in Madang).
- + The security needed; the fact I couldn't visit local markets and walk around freely. And even the potential danger in driving in POM. All the vehicles my company use are fitted with distress alarms.

Least appealing aspects: Environment and rubbish



19%
Share of
comments

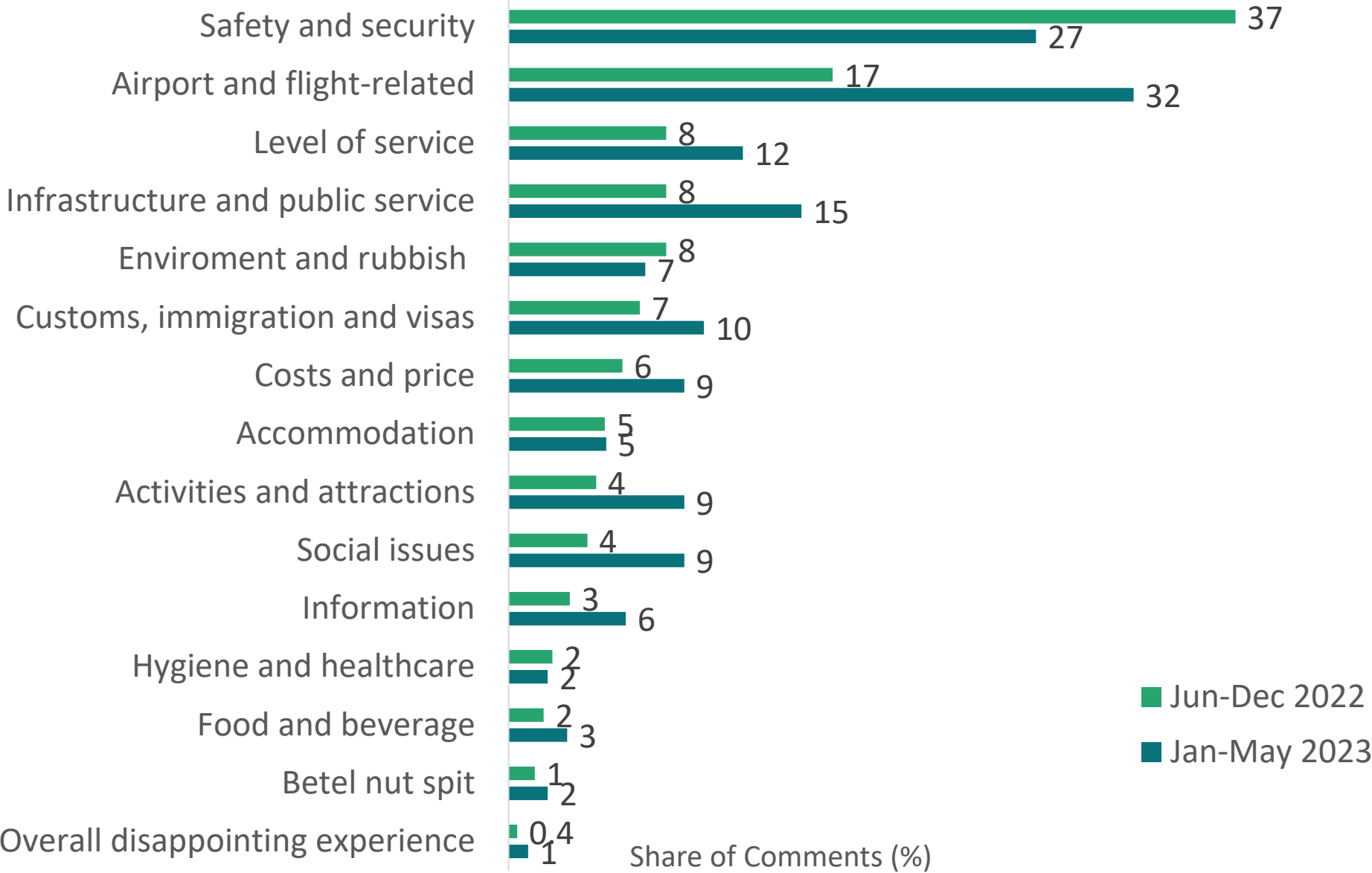
- + Least attractive coming from an island nation was the trash piles on the side of the road and trash in the ocean.
- + Cleanliness and hygienic conditions quite low perhaps given the huge population and the dis-appropriate levels of service workers - who are unable to keep up with the required standards of cleanliness.
- + Plastic waste was more concentrated around populated areas which was disappointing. Flight travel arrangements were an absolute nightmare through Air Niugini.
- + More litter and rubbish on the ground than any other country I have been to. Quite honestly, my friends all asked how it was and I could only say it was filthy and that I would not recommend. Safety is also a big concern; I would not bring my family there as a tourist.
- + More litter and rubbish on the ground than any other country I have been to. Quite honestly, my friends all asked how it was and I could only say it was filthy and that I would not recommend.
- + The smell from the burning of trash in the evening poured into my hotel room. It was so intolerable that I had to find another place to stay, which is a shame because it was a really nice accommodation. But that reason alone is why I would never recommend visiting PNG.

Least appealing aspects: Airport and flight-related



- + The many cancelled flights that stranded us many nights resulting in our plans having to constantly change.
- + Air Niugini does NOT cooperate with travel booking with other airlines. They require you book separately with them.
- + The domestic airport is extremely crowded with big queues relevant to the breakdown of the security scanning
- + Domestic flights were completely unreliable. We had numerous flight delays and cancellations which caused us to miss scheduled tours and activities
- + Air Niuginia was a disaster. I was stuck in Daru two extra days because they didn't land the plane due to drizzle of rain. Air Papua landed right before them with no problems. It caused me to miss my international flight and I had to purchase new tickets home (an extra \$3500 USD).
- + Air Niugini domestic flights which rely on an ageing fleet long overdue for replacement, frequent flight cancellations and delays resulting in many hours waiting in terminals. The Port Moresby to Hoskins early morning service has a 50% cancellation rate. Not enough working planes to satisfy the scheduled flights.

Suggestion for improvement



■ Jun-Dec 2022
■ Jan-May 2023

Share of Comments (%)

Note: Qualitative analysis, the responses can add to more than 100%. Total responses for Jun-Dec 2022 N=223, Jan-May 2023 N=256.

Suggestions for improvement: Airport and flight-related issue



32%
Share of
comments

- + Domestic airport overcrowded and disorganised.
- + Start improving government services e.g. visa processing, airport queues and cleanliness.
- + More competition needs to be encouraged on the Internet and airline industries.
- + Air Niugini needs to update their cooperation with other airlines to work with them.
- + Improve the safetiness and professionalism of the staffs in the airport. some of the guards in the screening are asking for money and my extra phone
- + More reliable domestic flights and reliable Wi-Fi/internet in Lae Airport Lounge so that business travellers can continue to work there if delayed.
- + Improved services and check-ins for Air Niugini. This remains an unpleasant experience and has not improved at all in recent years. Better maintenance of mid-range hotel rooms making them better value for the high rates paid.
- + Air Niugini's fleet needs to be upgraded so they can run to schedule and possibly increase services so that people don't miss their connections and lose out on time at their chosen destination or have to spend more money changing their flights that are on a separate ticket due to the Air Niugini delays. It took us 2 days longer to get home due to Air Niugini flight cancellations and most of us had onward flights that we had to cancel and buy new tickets

Suggestions for improvement: Safety and security



27%

Share of
comments

- + Increased opportunities to safely visit public places such as markets, villages, games, etc.
- + Being a safe country to walk around without a local taking you everywhere, so many security in the hotel, streets cleaner because it's a lovely country.
- + This country is not safe for foreigner to visit. We escaped an attempted car hijack in the broad daylight in Port Moresby.
- + Feeling safe & secure when walking around. It was a real shame that I couldn't walk with any sense of safety around Port Moresby.
- + PNG will not become a viable tourist destination until security threats are no longer a problem or until infrastructure (electricity, water, internet) are improved.
- + Everything we read about Port Moresby was negative because it was so unsafe. Invest heavily in your people and your infrastructure and people will come. It does appear that the government wants it both ways. We would come back in a heartbeat as we really fell in love with PNG.

Suggestion for improvement: Infrastructure and public service

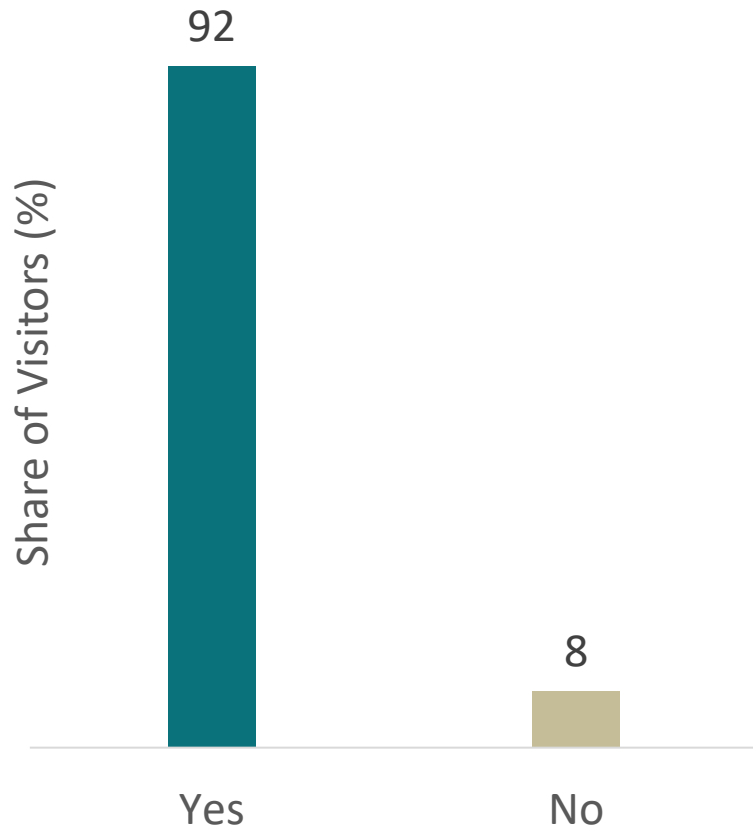


15%

Share of
comments

- + Roadworks need to be improved along with security and electrical black outs.
- + More competition needs to be encouraged on the Internet and airline industries.
- + Sealed roads across the Bougainville Island, but I understand it takes time and money.
- + PNG will not become a viable tourist destination until security threats are no longer a problem or until infrastructure (electricity, water, internet) are improved.
- + Local conveyance like taxi could be good and easily available. Food delivery with minimum delivery charges will help people save their time.
- + Improve the system (timeframe, review and other necessary action) to issue VISA online. It seems, safety is the main aspect that need to be improved in PNG particularly in Lae city. Comfortable transportation & Infrastructure may be needed to accommodate, ease the access for tourist to all region/city.
- + The Kokoda Trail had not been maintained (barely visible foot pad in some places) & only 2 villages offered showers (rest required bathing in streams). Constant rain meant wet tents on soggy ground. A timber base for tents would be a great improvement. And a permanent cooking facility (besser bricks?) would make the cooks' job much easier for ALL Kokoda tours. Surely this can be organised?

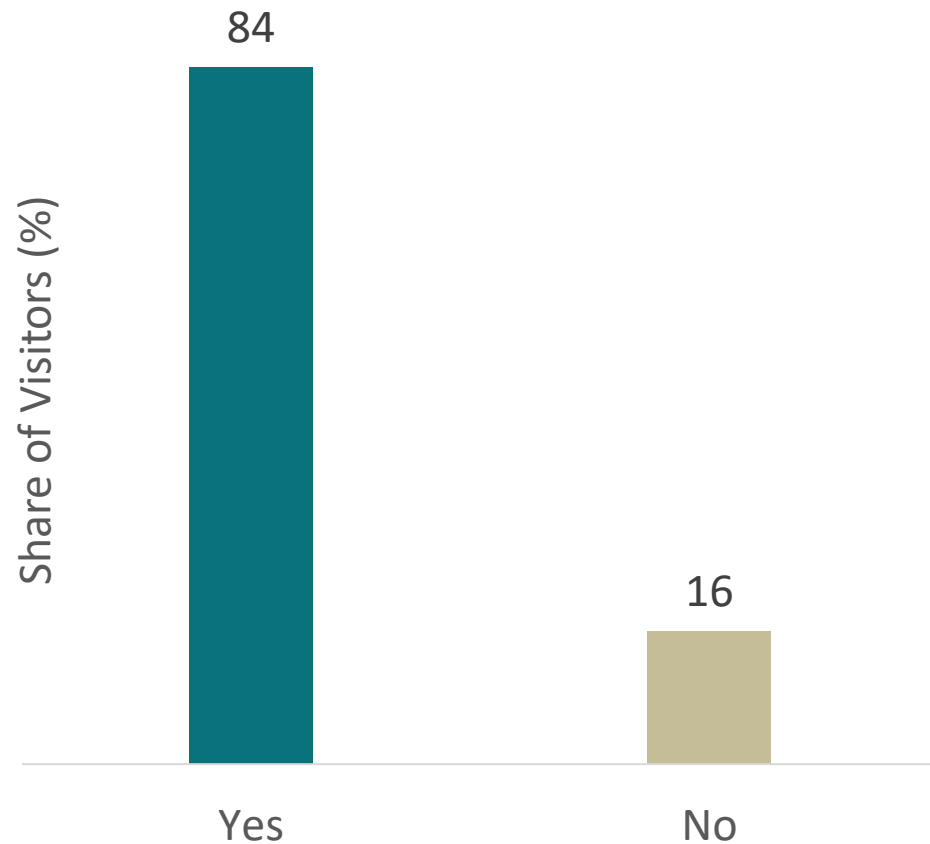
Willingness to return to PNG



Quotes: Reasons for not return

- + Only follow business trip schedules
- + Hotels are very expensive; not security to walk; everything expensive; not hygiene
- + It's just too expensive and Air Nuigini is too unreliable.
- + Only went to walk the Kokoda Track.
- + The chaotic flight services and over pricing
- + Because it isn't safe enough to travel around independently and even not recommended for group travel

Willingness to recommend to PNG



Quotes: Reasons for not recommend

- + Safety remains a major concern for international traveler/tourist. There are some other better options around the region.
- + Until the services of Air Niugini improve.
- + eVisa messed up was a real and very expensive problem to sort out.
- + Law and order issues, and poor hospital services.
- + Rubbish everywhere and betel nut spit everywhere
- + It is too difficult as a tourist to see and do things.
- + Too expensive for a vacation/ leisure trip. Money is not worth the value.

Thank you

Authorship: Dr B. Bai, Dr D. Zhu, J. Doan,
Prof P. Kim, and Prof M. Orams



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FOREIGN AFFAIRS & TRADE
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