

# INTERNATIONAL VISITOR SURVEY

## PAPUA NEW GUINEA 2020



Published October 2020  
International air arrivals



# IMPORTANCE OF THE INTERNATIONAL VISITOR SURVEY (IVS)



Provides **unique insight** to current tourism markets.



Creates a baseline from which government and industry stakeholders can **measure growth and track trends**.



**Presents profiles** of current visitors.



Increases **understanding of travel patterns** in the PNG provinces and regions.



Provides a snapshot of how the industry was performing just prior to the onset of **the COVID-19 pandemic**



Provides data to inform **marketing strategies** including key market segments, distribution channels and motivation factors.



Allows for businesses and government to make **evidence-based decisions** for marketing, product development, policy and strategies.



**The database grows over time** enabling further data mining and the addition of new themes.

## SUMMARY OF KEY FINDING: VISITOR SPEND

JANUARY – MARCH 2020 TOTAL AIR ARRIVALS

**USD 29M**

TOTAL SPEND USD

**PGK 103M**

TOTAL SPEND PGK

**15,683**

TOTAL VISITORS

↓ 28% decrease  
compared with  
Jan to Mar 2019

**USD 1,870  
PGK 6,556**

PER VISITOR  
PER TRIP

↓ 13% decrease from  
2019 annual average

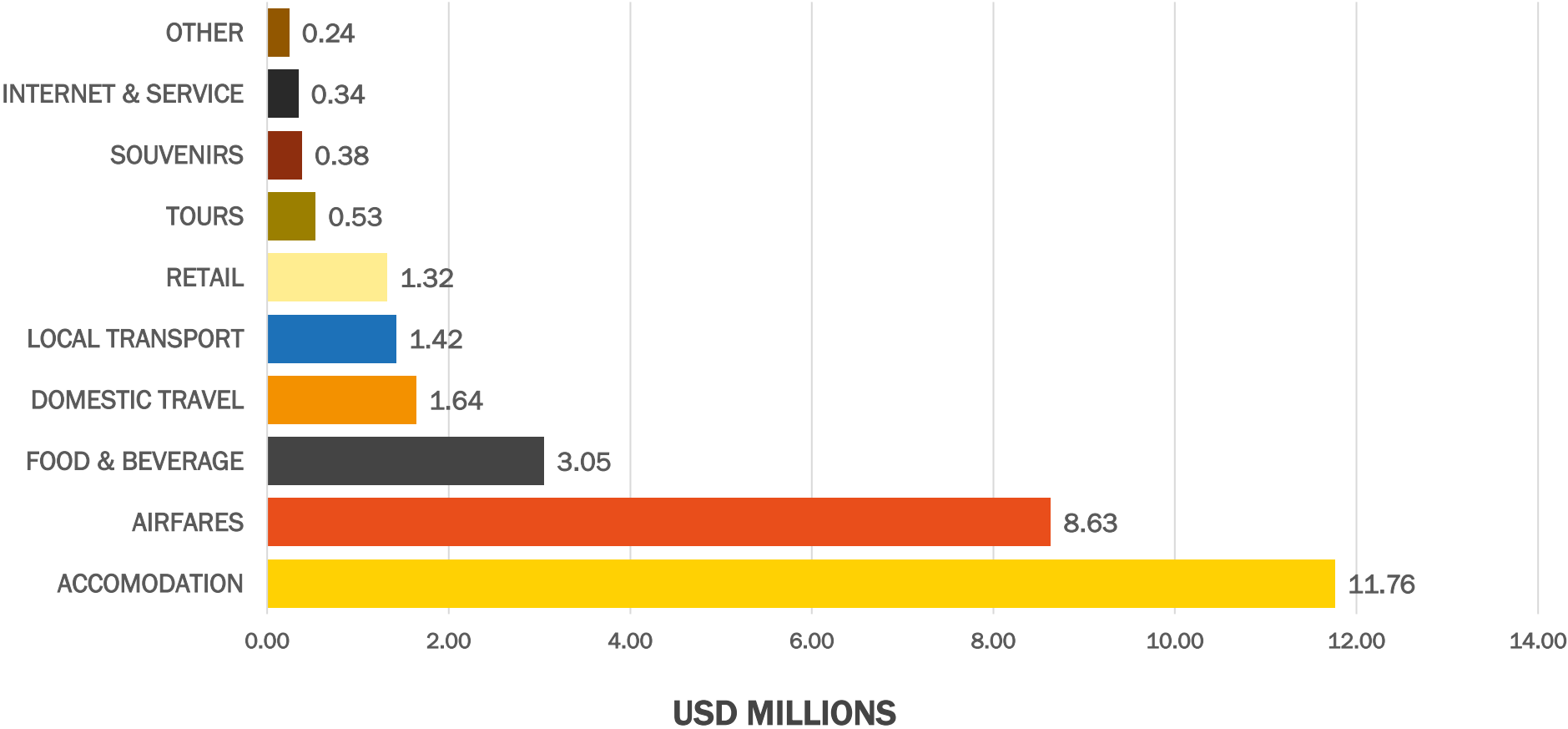
**USD 182  
PGK 637**

PER VISITOR  
PER DAY

↓ 16% decrease  
from 2019  
annual average

Average spend per day and per visit is lower than the 2019 annual average. This trend reflects a slow down in travel over the holiday period and also the emerging challenges of COVID. NB Visitor spend around the Pacific has declined.

SPEND IN COUNTRY AND PRIOR TO ARRIVAL



Visitor spend is lower than previous year. The IVS will continue to monitor the trend to guide the recovery of the industry.

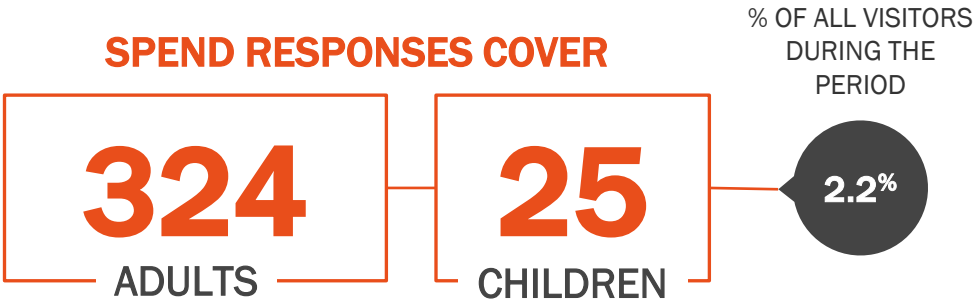
# INTERNATIONAL VISITOR SURVEY

## Overall analysis

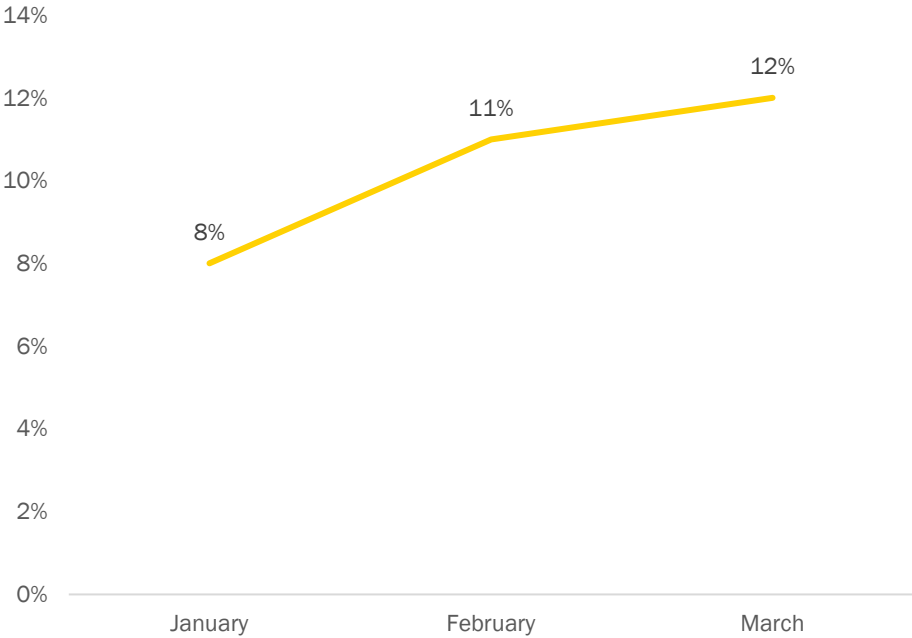
JANUARY – MARCH 2020



RESPONSE RATE DATA



RESPONSE RATE TO SURVEY



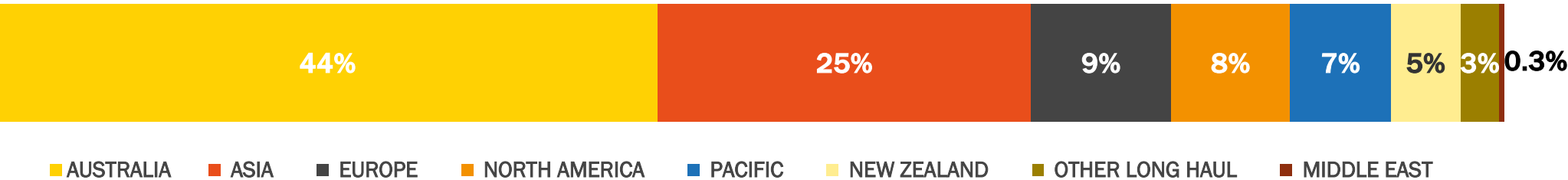
The conversion rate remained relatively stable and similar to that in 2019. A relatively small number responses were received due to the interruption of COVID. This report shows the impacts of the last visitors prior to COVID shutdowns. The data presented here provides a baseline from which to understand the future growth of tourism post-COVID.

Note: The response rate is based on the number of survey responses in Qualtrics (before data cleaning).

# TOTAL VISITORS DEMOGRAPHICS

JANUARY – MARCH 2020 TOTAL VISITORS

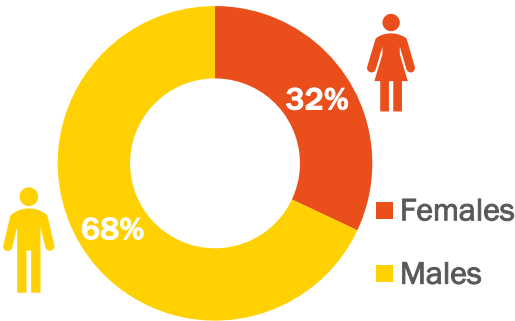
TOTAL VISITORS (%) BY MARKET \*



VISITOR AGE (%)

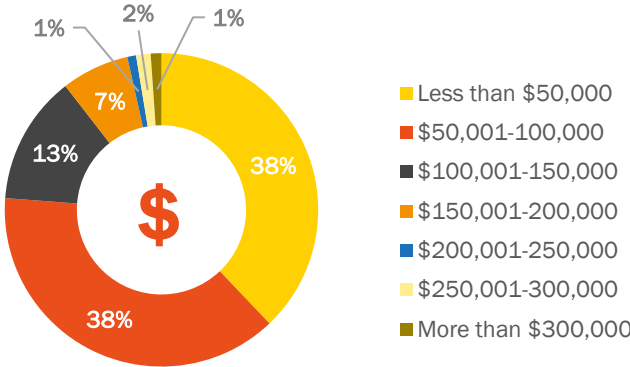


GENDER



HOUSEHOLD INCOME (USD)

Average household income  
US\$80,020



PNG continues to rely heavily on the Australian market for visitor arrivals. The middle-aged male travelers reflect the importance of business and adventure tourism markets. About 24% of visitors have a household income over US\$100,000, with an average household income of US\$80,020, likely reflecting smaller but more valuable holiday markets, such as cultural and historical tourists.

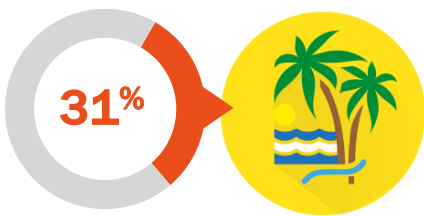
Note: \* Due to rounding, some figures do not add up to 100%.

PURPOSE OF VISIT

JANUARY – MARCH 2020 TOTAL VISITORS

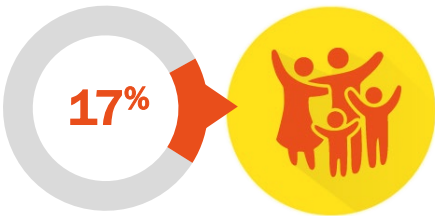


BUSINESS



HOLIDAY

↓ 3%  
DECREASE  
FROM 2019



VISITING FRIENDS & RELATIVES

AVERAGE LENGTH OF STAY



AVERAGE LENGTH OF STAY

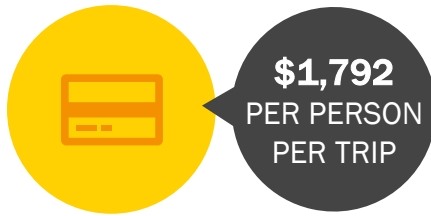


↓ 4%  
DECREASE  
FROM 2019

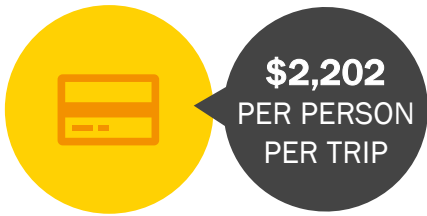
AVERAGE LENGTH OF STAY



ECONOMIC IMPACT USD

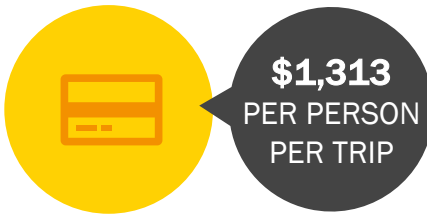


ECONOMIC IMPACT USD



↓ 6%  
DECREASE  
FROM 2019

ECONOMIC IMPACT USD



The share of holiday visitors declined in Jan to Mar 2020. In 2020, VFR visitors stayed longer than other visitor types, but remained the lowest spenders of the three. Holiday makers remain the highest spenders in PNG, spending 19% more than business travelers, and 40% more than VFR visitors per person per trip.

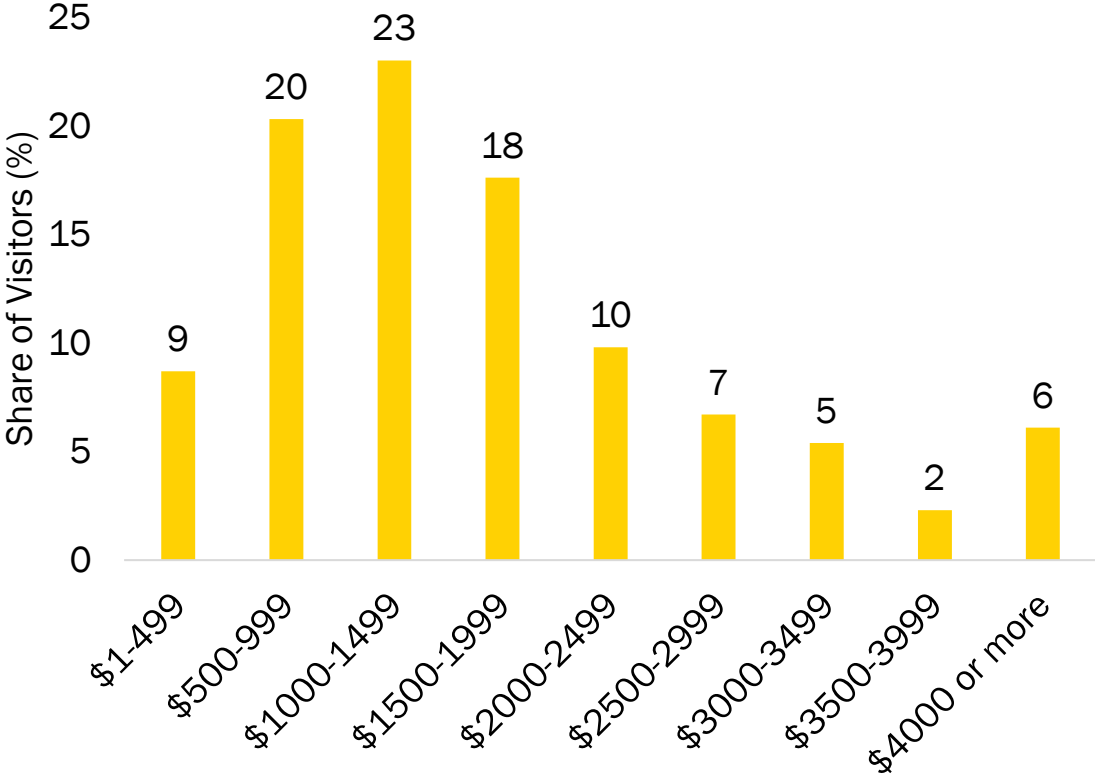
Note: Purpose of visit percentages based on IVS responses not actual immigration data.



Per person prior to arrival

USD 1,694

PGK 5,938



## IN COUNTRY EXPENDITURE PER PERSON PER DAY

JANUARY – MARCH 2020 TOTAL VISITORS

Expenditure Items	Spend per person per day		
	Mean (USD)	Mean (PGK)	(% of spend)
Accommodation	30.1	105.4	40
Food & Beverage	13.6	47.5	18
Domestic Travel	10.1	35.5	14
Retail	8.2	28.7	11
Local Transport	3.5	12.1	5
Tours	3.3	11.5	4
Souvenirs	2.4	8.3	3
Internet & Service	2.1	7.5	3
Other	1.5	5.1	2
<b>Total Expenditure</b>	<b>75</b>	<b>262</b>	<b>100</b>



Per visitor per day  
while in PNG:

**USD 75**  
**PGK 262**



Local spend per person per day decreased 12% compared with 2019 annual average.

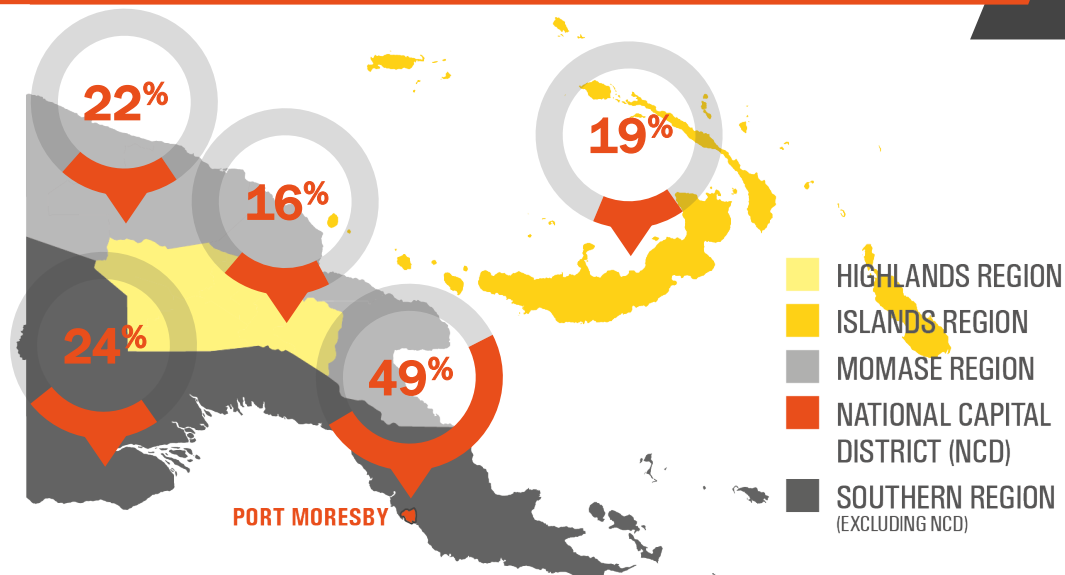
### Visitor Expenditure - Per Person & Total

	Average Spend before Visiting	+	Average Spend While in PNG	=	Total Spend
Per Day	\$107 USD \$375 PGK		\$75 USD \$262 PGK		\$182 USD \$637 PGK
Per Trip	\$1,101 USD \$3,860 PGK		\$769 USD \$2,696 PGK		\$1,870 USD \$6,556 PGK

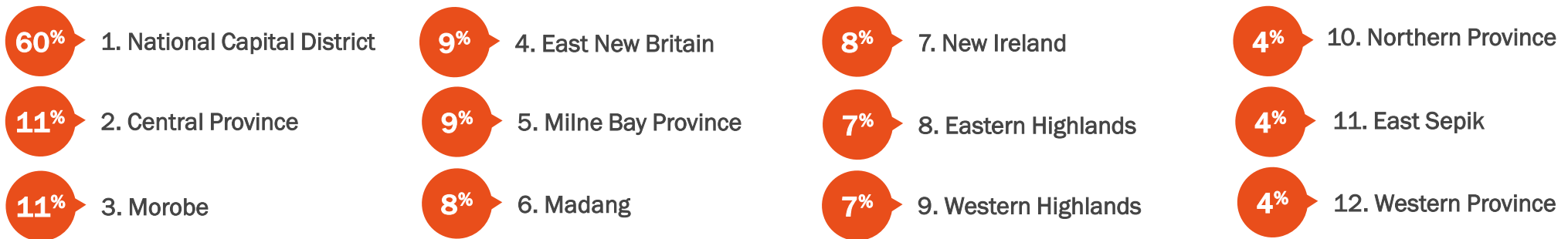
Total spend decreased 13% compared with 2019 annual average.

# REGIONS VISITED & VISITOR SATISFACTION

JANUARY – MARCH 2020 TOTAL VISITORS

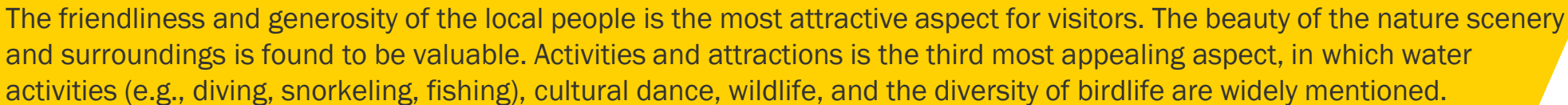


# TOTAL VISITATION TO THE PROVINCES\*



In the first 3 months of 2020, 61% of visitors traveled to the provinces compared to 66% of visitors in 2019. Central Province remains among the top visited due to the popularity of the Kokoda Track. Visitation to Morobe and Western Highlands is likely driven by business travel. The tourism hub of East New Britain is the next most popular, positioning it well for future growth.

Note: \* Multiple responses, therefore totals do not add up to 100%

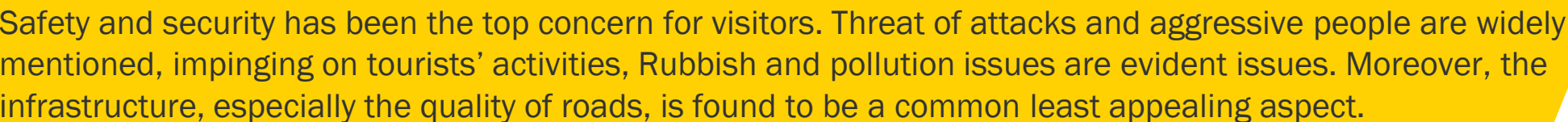




## MOST APPEALING ASPECTS

## JANUARY – MARCH 2020 TOTAL VISITORS

- Friendliness of the national's people, diversity of cultures and learning the Pidgin language.
- Genuine friendliness and appreciative of the people. I have volunteered throughout the world, but nowhere have I had such an experience.
- Natural scenery was amazing.
- Overnight stay in a local village with morning trek to see birds of paradise.
- The diversity of the birdlife and being in a different culture.
- Uniqueness of Asaro Mudman Dance.
- New development around the airport and downtown of Port Moresby.
- Handicrafts are always interesting.
- Port Moresby is much cleaner than it was on my last trip there. It is obvious that efforts have been made to improve the environment for citizens and visitors.

[illegible]

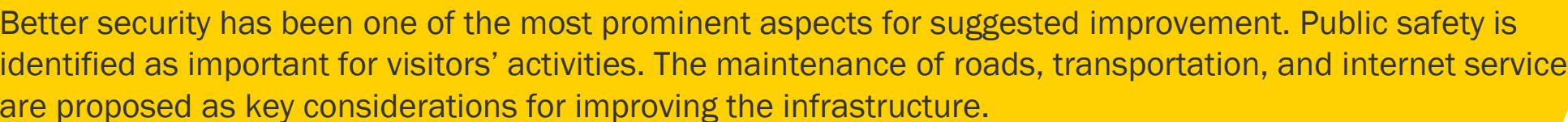


## LEAST APPEALING ASPECTS

JANUARY – MARCH 2020 TOTAL VISITORS

- The harshness of some people in public and people who steal in public.
- Security, aggressive people and terrible roads.
- Issues of security. Stories of kidnappings, car jackings, armed robberies against foreigners.
- Lots of rubbish and plastics in the sea and waterways.
- Hotel accommodation is overpriced. Roads are very busy.
- Handicrafts are very expensive.
- Lack of infrastructure, frequent drop out of electricity.
- Some areas visited are stained with betel and the poor standard of health facilities and service deliveries.
- The atrocious state of the roads in Madang. The lack of basic social support, particularly for the poor, such as power, internet, healthcare.



[illegible]



## IMPROVEMENTS QUOTES

## JANUARY – MARCH 2020 TOTAL VISITORS

- Better security. Safer environment for women especially.
- Would like to walk around town more but do not feel safe.
- Clean up the city, Reduce domestic travel costs.
- Roading improvements and better service from the regional airline.
- Hotels are generally too expensive.
- If restaurants served healthy traditional food rather than burgers!
- Better road from the airport, better communication by Air Nuigini when internal flight was delayed.
- Health and hygiene awareness.
- Improved ability to get temporary internet and phone service.



- That Air Niugini changes its flight schedules. It is as bad as Solomon Air and I'm unlikely to go back to the Solomons though I'd really like to return to PNG after this crazy covid-19 time. Congratulations to your government for keeping PNG free from covid-19 (apart from the mine worker who flew in).
- The Corona virus isolation.
- I didn't feel any inconvenience except for the new virus countermeasures. (新型コロナウイルス対策以外は特に不便を感じることはなかった)
- Travel by boat and plane very restrictive due to virus.



# INTERNATIONAL VISITOR SURVEY



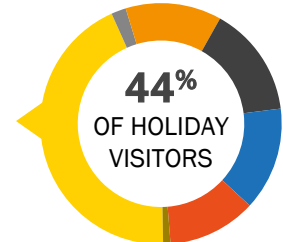
## AUSTRALIA HOLIDAY MARKET PROFILE

JANUARY – MARCH 2020



# JAN-MAR 2020 HOLIDAY VISITORS

## AUSTRALIA



# 6,876

TOTAL VISITORS

# USD 11.8M

TOTAL SPEND USD

# PGK 41.5M

TOTAL SPEND PGK

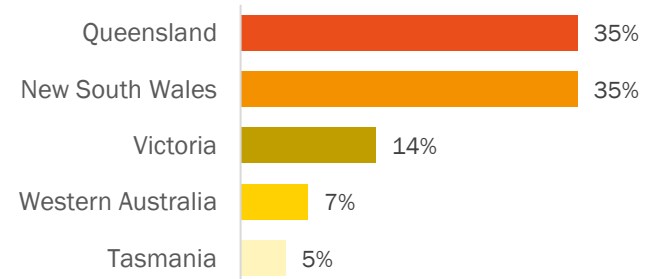
### AVERAGE LENGTH OF STAY



### SPEND



### TOP 5 STATES

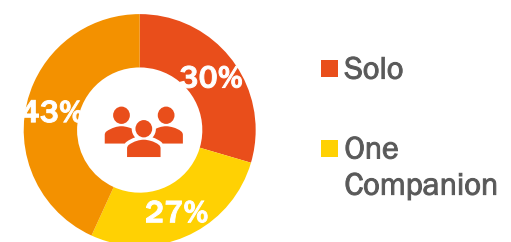


### PREVIOUS VISITS



■ 1st ■ 1 or 2 times ■ 3 or 4 times ■ 5+ times

### TRAVEL GROUP



Australians remain the largest holiday market, their market share is 44% in Jan-Mar 2020. Australian visitors spend US\$175 per day, with average length of stay 9.8 nights. They continue to be a strong repeat visitor market, with 59% having visited PNG at least once before.

Note: Totals based on actual immigration data by source market and purpose of visit.



## JAN-MAR 2020 HOLIDAY VISITORS

## AUSTRALIA

**44%**  
OF HOLIDAY  
VISITORS



### TOP 5 PROVINCES VISITED\*

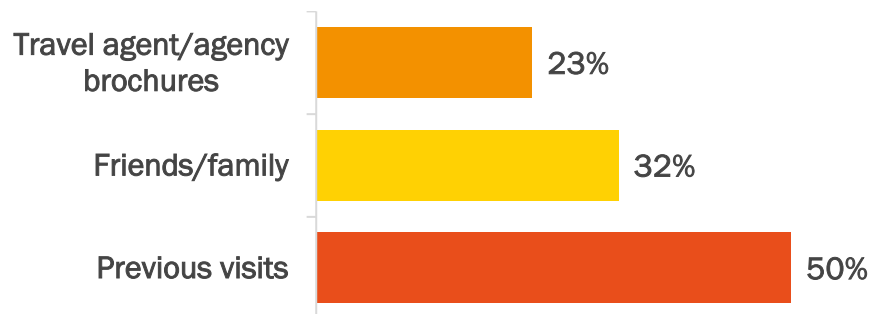
- 35%** 1. National Capital District
- 33%** 2. New Ireland
- 14%** 3. Central Province
- 12%** 4. Milne Bay Province
- 10%** 5. East New Britain



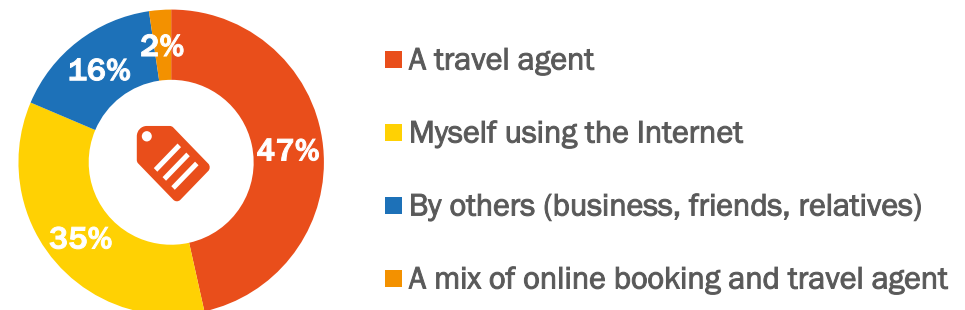
### TOP 10 ACTIVITIES\*

- 76%** 1. Sightseeing
- 72%** 2. Visiting the beach
- 63%** 3. Local markets
- 61%** 4. Swimming
- 58%** 5. Visited villages
- 46%** 6. Surfing
- 42%** 7. Hiking and walking
- 40%** 8. Museums
- 40%** 9. Traditional cooking
- 39%** 10. Snorkelling

### INFORMATION SOURCES USED FOR PLANNING? TOP 3 OPTIONS \*



### HOW DID YOU PURCHASE YOUR TRAVEL?



The Australian market is driven by natural sightseeing and cultural tourism, evidence in the top five activities that visitors participated into. More than any other market, Australians rely on previous visits and friends and family for trip planning, also using travel agent/agency brochures to aid in the planning process. Nearly half of Australians used a travel agent to purchase their travel, while over one third booked themselves.

Note: \* Multiple responses, therefore totals do not add up to 100%



**Thank You**

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