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1. Introduction

The Papua New Guinea Tourism Promotion Authority analyses and reports foreign arrival statistics monthly, quarterly and annually based on arrival data collected from Jacksons International Terminal. In 2005, this was extended to other smaller ports in Papua New Guinea including Mt. Hagen, Tabubil, Port Moresby, Lae, Madang and Vanimo (Watung) Boarder, to capture data of the other growing segments of foreign arrivals, i.e. land border arrivals and cruise ship visitors. Consequently, this report has been expended to include more additional tables and notes. This is for air, sea and land border arrivals.

All figures contained in every data analysis and reporting by the Tourism Promotion Authority on foreign arrivals are based on short-term visitors (visitors who stay for more than one day and less than two years). Figures of returning residents and nationals are not included in the analysis and reporting. One visitor visiting the country several times in a year is counted as new arrival.

If you're in the tourism industry or supporting development of tourism in Papua New Guinea, you need to know where overseas visitors come from, performance from each source country, how and why they come, and some basic demographics. This version of the annual report records short-term visitor arrivals to Papua New Guinea in 2006 and analyses:

- foreign arrivals performance
- visitor profile
- volume, mode and purpose of visit
- travel pattern, including length of stay and provincial distribution

There are few recommendations made based on findings and are needed to be considered seriously.

Disclaimer

The Tourism Promotion Authority makes every effort to publish reports that are error-free. However, with the large number of expended complex data that are analyzed, we cannot guarantee that all reports are totally free of error. All errors that are detected are immediately corrected and the latest version of the report is always available on www.pngtourism.org.pg. Any comment or suggestions on what should be included or excluded are welcome.



2. Overview of the year

The year 2006 can be termed as highly successful year as far as tourism in Papua New Guinea is concerned. Tourism arrivals in the year went up to 77,730 reflecting an increase of 12.2% over 69,251 visitors in 2005. This was attributed to number of developments and favorable happenings in the tourism industry in PNG, reflecting increases also on the number of holidaymakers and business visitors from most of the source markets.

The arrivals comprised 37 percent (27,994) holidaymakers including VFR and the remainder 63 percent (49,547) business travelers, consisting of short-term employees, conventioners and investors. The holiday segment, with additional 4,804 arrivals over 2005 figure showed increase by 26.5 percent and the business segment by 9.9 percent respectively.

Australia & Asian Markets

In volume terms, the growth in 2006 largely came from Australia and Asia. These markets are dominated by business travelers.

Arrivals from Australia increased by 11 percent, mostly as a result of more marketing & promotional activities undertaken by TPA including the industry partners, and more luxury cruise ships visiting from the markets. Asian visitor numbers increased by 30.2 percent due to the involvement and increase in business activities in PNG. Most of the growth out of Asia is from China, followed by Malaysia.

Japan & Oceania Markets

Arrivals from only two markets, Japan and Oceania (Pacific Islands), dropped by 26.6% and 12.7% respectively. The decline from the Japanese market in 2006 was attributed to fewer cruise passengers than last year, 2005 and cancellation of PX flights by Air Niugini to Narita (Japan).

The factors such as Civil Unrest or Political tensions in Solomon Islands and Fiji were the cause of the drop in arrivals from Oceania (Pacific Islands).

European Markets

After a year of losses out of major European markets, there has been a recovery out of all the markets in 2006, collectively reflecting increase by 32.4 per cent over the past year. Most of the gains in volume were contributed by UK, Germany and other European markets consisting Russia, Italy, Scandinavia and the Netherlands, all accounting for 1,264 more visitors from 3,938 visitors in 2005.

American Markets

The American market continued to increase for three consecutive years (2003, 2004 & 2005). In 2006 more holiday visitors have arrived by both air and cruise ship, and as a result arrivals from the whole of America increased by 13.3%. Most of the growth in volume was from America and accounted for 60 percent of the gains contributing 519 more visitors. Canada also represented 37.2% of the gains with additional 321 visitors to Papua New Guinea in the year.

Although arrivals from Europe and USA increased in the year, the markets appear to show imbalance trend in their purpose of visit categories, whereby the business visitors dropped while the holiday visitors increased. This indicates that the increase in the overall arrivals from the markets was pulled up by increases in the holiday arrivals.



3. Notes & Definition

a. Definitions

Definitions used in this report are similar to those used by regional and international tourism organizations including Pacific Asia Travel Association (PATA) and World Tourism Organization (WTO).

1. Visitors – Any person who travels to a country other than that in which he/she has His/her usual residence but outside his/her usual environment or who travels within the country outside his/her usual environment, for period not exceeding twelve months and whose main “Purpose of Visit” is other than the exercise of an activity remunerated from within the country or place visited.

2. Tourist - A visitor whose visit is for at least one night and whose main purpose of visit may be classified under one of the following three groups:

- a. leisure and holiday;
- b. business and professional;
- c. other tourism purposes.

3. Business travel - Trips and visits made by employees and other in the course of their work, including attending meetings, conferences and exhibition.

4. VFR - Refers to those who travel to a destination with the aim of **visiting friends and relatives**

5. Market Share - For the purpose of this report only, is the ratio of visitors for a destination country in the region to the total visitor arrival to the region during a specific period.

6. Arrivals - All data refer to arrivals and not actual number of people traveling. One person visiting the same country several times during the year is counted as a new arrival.

b. Abbreviations

The following abbreviations correspond to the following provinces of Papua New Guinea.

- NCD** – National Capital District
- SHP** – Southern Highlands Province
- WHP** – Western Highlands Province
- EHP** – Eastern Highlands Province
- ESP** – East Sepik Province
- WSP** – West Sepik Province
- NIP** – New Ireland Province
- ENBP** – East New Britain Province
- WNBP** – West New Britain Province
- TPA** – The Tourism Promotion Authority of PNG
- PNG** – The country Papua New Guinea

c. Purpose of Visit

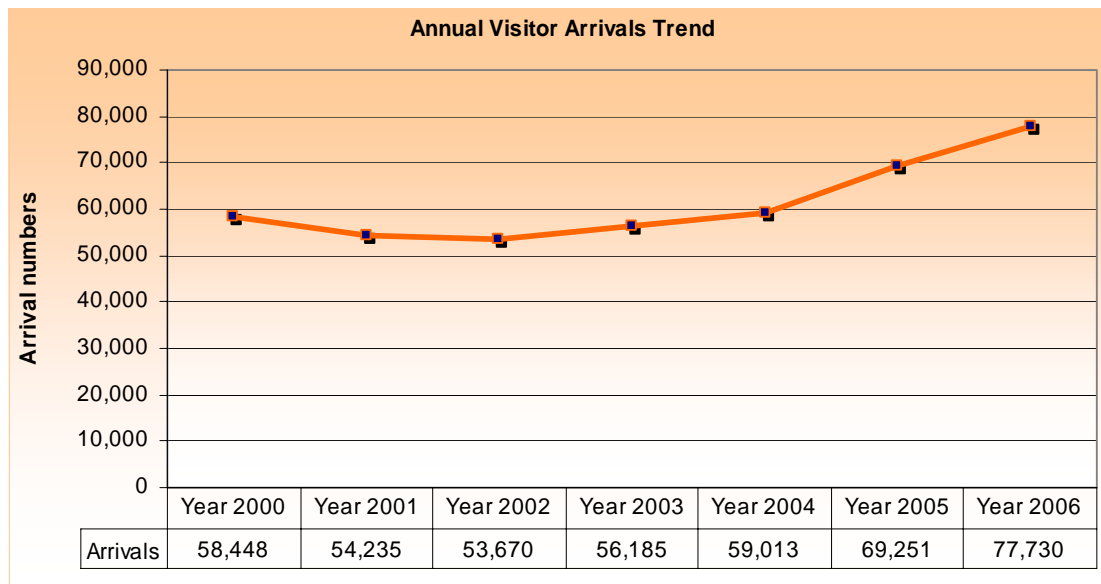
Visitors are categorized under three major categories depending on their reasons for visit:

1. Business: Business; accompanying business traveler; convention and employment.
2. Holiday: Holiday
3. VFR: Visit Family & Relatives



4. Foreign Arrival Performance, 2000 - 2006

September 11th, 2001 followed by Iraq War, Bali Bombing and other continuing upheavals in the recent past had affected travel and tourism worldwide. As a result Papua New Guinea experienced negative trend in visitor arrivals for two years, a slight drop from 58,448 in year 2000 to close to 54,000 in 2002. Being signaled by such performance, the PNG Tourism Promotion Authority had battled in the frontline both within and abroad with positive approaches in exercising its roles and responsibilities to counteract this unfavorable tourism development in PNG. Promoting and campaigning for Papua New Guinea as safer alternative destination for international travelers and investors had resulted Papua New Guinea to seeing upward trend from year 2003, recording increase by 4.7% in that year, further up by 5% in 2004, more better 17.3% in 2005 and 12.2% this year, 2006. The growths were experienced from all of the source markets, except Oceania and Japan where there have been declines in 2006.



International Visitors Arrivals to Papua New Guinea – Total Air Sea & Land, 2000 to 2006

Source Country	2000	2001	% Change	2002	% Change	2003	% Change	2004	% Change	2005	% Change	2006	% Change
Australia	29,285	27,661	-6	26562	-4	30609	15	32290	6	36662	14	40642	10.9
NZL	2,648	2,731	3	2351	-14	1952	-17	1858	-5	2386	28	2867	20.2
Oceania	1,356	1,410	4	1426	1	2095	47	1974	-6	2518	28	2199	-12.7
China	1,100	1,016	-8	858	-16	860	0	1074	25	1267	18	2338	84.5
Japan	3,244	2,686	-17	3804	42	3789	0	3474	-8	5401	56	3966	-26.6
Malaysia	2,066	1,831	-11	1538	-16	1805	0	2106	17	2443	16	3155	29.1
Philippines	2,656	2,540	-4	2448	-4	2772	13	2657	-4	3344	26	3784	13.2
India	1,019	1,013	-1	764	-25	621	-19	630	1	736	17	1002	36.1
Oth Asia	2,473	1,800	-27	1926	7	2384	24	2530	6	3495	38	4422	26.5
UK	2,279	2,133	-6	1803	-15	1459	-19	1581	8	1476	-7	1783	20.8
Germany	976	1148	18	802	-30	896	12	1172	31	597	-49	818	37.0
France	289	330	14	246	-25	206	-16	164	-20	217	32	298	37.3
Oth Eurpe	1,654	1,550	-6	1880	21	1653	-12	1822	10	1865	2	2601	39.5
USA	5,429	5,314	-2	6053	14	4261	-30	4748	11	5709	20	6228	9.1
Canada	719	705	-2	848	20	560	-34	586	5	660	13	981	48.6
Oth Amer	1,043	123	-88	89	-28	72	-19	106	47	122	15	146	19.7
Africa	212	244	15	271	11	191	-30	241	26	353	47	500	41.6
Not State	0	0	0	1	0	0	0	0	0	0	0	0	0
Total	58,448	54,235	-7.2	53670	-1.0	56185	4.7	59013	5.0	69251	17.3	77730	12.2



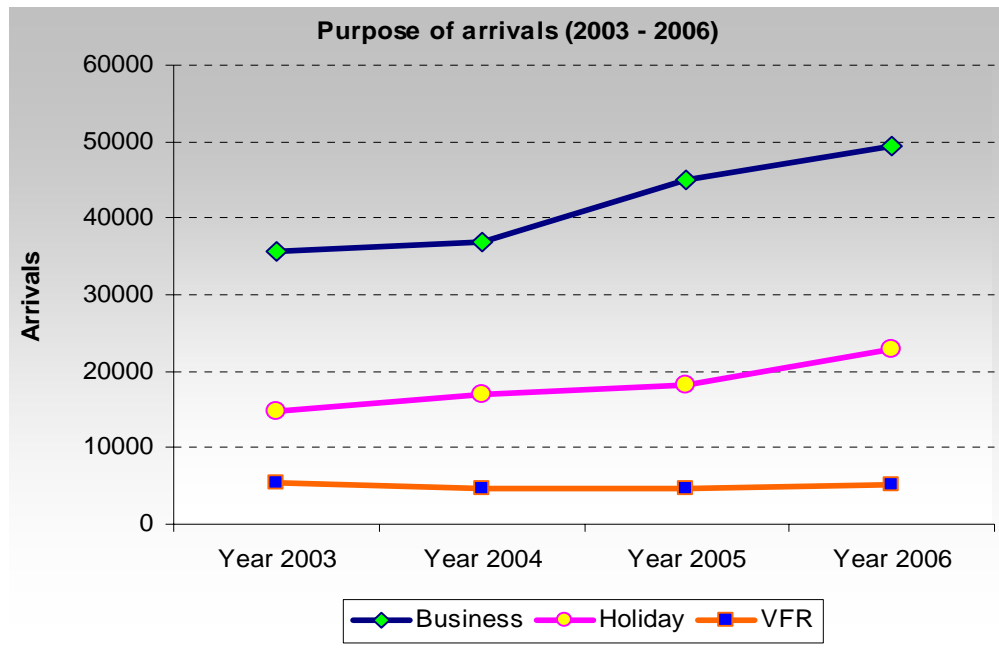
5. VISITOR PROFILE

7.1 Purpose of visit



International visitors travel to Papua New Guinea for different purposes:- some come for holiday and to visit family/relatives while others come for meetings, conventions or short-term employments. For statistical analysis and reporting all arrival figures are categorized under two major categories, *Business* and *Holiday*. Visitors who come for meetings, conventions or short-term employments are considered as **business** travelers while those who come for the intention of visiting their family or friends (VFR) are categorized also as **holiday** visitors.

The proportion of business oriented visitors continued to dominate arrivals in PNG and in 2006 the segment pulled up by 9.9% compared to the previous year. These favourable performances are reflection of more business activities like mining operations, oil drilling, farming, logging, and meetings and conferences such as the South Pacific Ministers, ACP and EU meeting held in PNG in 2006. A higher increase (26.5%) was recorded for holiday segment with 4,804 more visitors in the year, attributed by successful products development in PNG and marketing, promotion and awareness campaign of these products in a focus manner out in the visitor source markets by TPA. More visitors also came to visit their friends and relatives in the year as it reflected increase of 6.6 percent.



Purpose of Arrival				
	Business	Holiday	VFR	Other
Year 2003	35,545	14,817	5,388	631
% +/-	6.2	-3	13.3	-
Year 2004	36,796	16,917	4,671	629
% +/-	3.5	14.2	-13.3	-
Year 2005	45,098	18,115	4,762	1,276
% +/-	22.6	7.1	1.9	-
Year 2006	49,547	22,919	5,075	189
Change	4449	4804	313	
% +/-	9.9	26.5	6.6	-



Purpose of arrival by Country

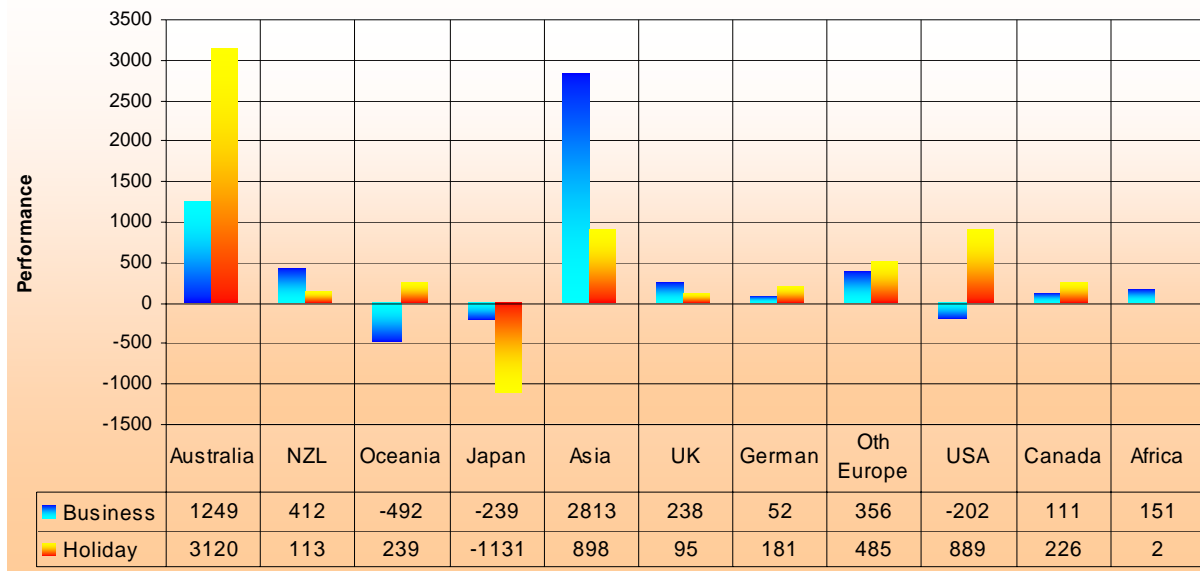


Growing awareness of Papua New Guinea and its products among the major visitor source markets have resulted in more holiday travellers choosing to travel into PNG in 2006, reflecting increases from all the markets, except a drop (-26%) from Japan with a difference of 1,130 less visitors compared to last year's holiday visitors (4,356).

3,120 more holiday visitors arrived from Australia and this reflected 30.2 percent increase compared to 10,332 holiday visitors in 2005. Business arrivals from the market also increase by 4.8 percent or 1,249 more visitors. The highest increase in percentage (137%) was recorded from Canada with only 226 extra arrivals in the year while USA donated 889 extra holiday visitors and recorded 28.5 percent increase. Business visits from USA dropped by 202 less visitors or -7.9% in 2006 over 2,551 visitors in 2005. Holiday arrivals from UK (+15.4%), Germany (+53.1%) and other European markets (+45.5%) increased, and collectively supplied 761 more visitors or up 37.6% compared to last year's figure, 2,023.

Both business and holiday visitors from all the Asian markets increased, collectively showing 31.3 percent up with 2,813 extra arrivals for business and 46.2 percent up or 898 extra arrivals for holiday compared to year 2005.

Arrival performance from each source country by purpose

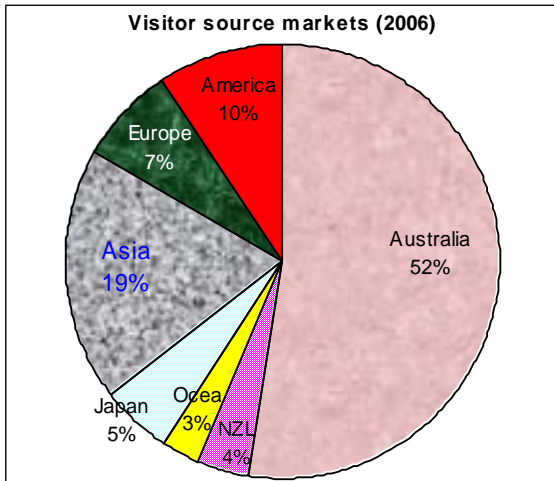


Purpose of Arrival by market area

	Business				Holiday			
	2005	2006	Change	% +/-	2005	2006	Change	% +/-
Australia	25870	27119	1249	4.8	10332	13452	3120	30.2
NZL	1862	2274	412	22.1	474	587	113	23.8
Oceania	2037	1545	-492	-24.2	401	640	239	59.6
Japan	977	738	-239	-24.5	4356	3225	-1131	-26.0
Asia	8996	11809	2813	31.3	1944	2842	898	46.2
UK	826	1064	238	28.8	617	712	95	15.4
Germany	240	292	52	21.7	341	522	181	53.1
Oth Europe	984	1340	356	26.2	1065	1550	485	45.5
USA	2551	2349	-202	-7.9	3116	4005	889	28.5
Canada	475	586	111	23.4	165	391	226	137.0
Africa	280	431	151	53.9	66	68	2	3.0



5.2 Country of Origin



Papua New Guinea saw the highest increase in international visitors from Australia and Asia in 2006.

Arrivals from Australia went up by 3980 more visitors this year compared to 36,662 arrivals in 2005, reflecting 11% increase. The market continued to remain the highest single source market for Papua New Guinea, accounting for 52 percent or 40,642 people of the total arrivals, followed by Asia with 19 percent and visitor numbers peaking at 14,701 arrivals by 3,416 extra visitors reflected increased of 30.3 percent. Most of the growth out of this market was from China and Malaysia.

Arrivals from America continued the upward trend to show increase of 13.3 percent, supplying 864 more visitors in 2006 and contributed 10 percent to the total arrivals. Europe supplied 7 percent to the total arrivals to PNG and an increase of 32.4 percent was recorded from this market.

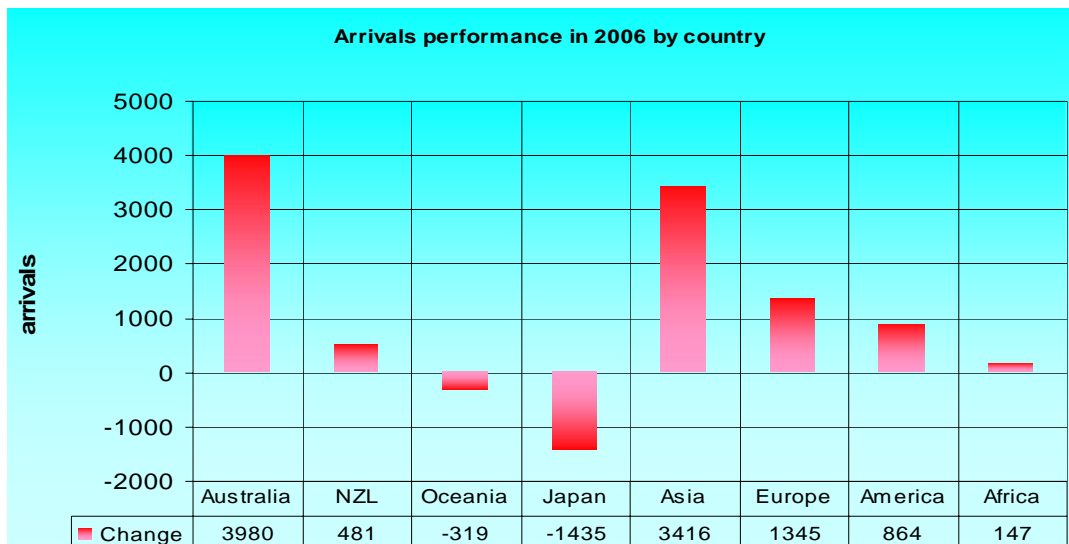
In addition to PNG's regular stream of visitors from countries such as Australia and Asia, Europe and America are part of the developing international markets category that TPA monitors.

The developing markets category include Japan; New Zealand; Europe, comprising Russia, Italy, Scandinavia, UK, Germany, France; America including USA and Canada. These countries accounted for 16,821 people, or 21.6 percent of all visitors to Papua New Guinea in 2006.

In the year Papua New Guinea experienced drop in arrivals from only Japan and Oceania. Arrivals from the Japanese market dropped by 26.6% or 1,435 people less compared to 5,401 arrivals including a higher number of cruise visitors in 2005.

A drop by 319 visitors from Oceania reflected decrease in percentage by 12.7 compared 2,518 arrivals in 2005.

The African market which was considered as low volume source market for many years is performing very well for Papua New Guinea in terms of donating visitors. Arrival from the country is increasing at an alarming rate and in 2006 there were 147 extra visitors or 42% increase compared to 353 visitors in 2005.





Russia, Italy Scandinavia Markets

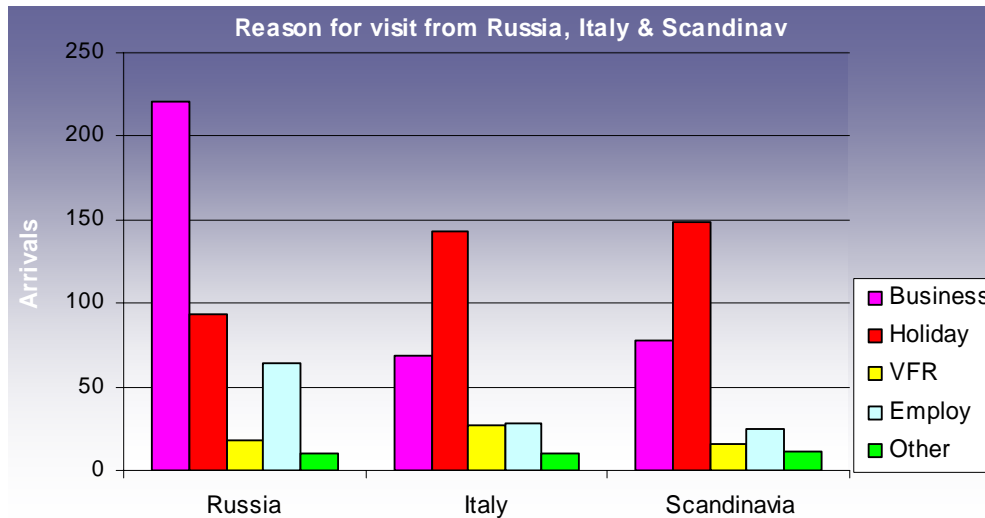
Since year 2004 the Tourism Promotion Authority has extended its marketing & promotional activity into the other long-haul markets of Europe, targeting the international travelers from Russia, Italy and Scandinavia. Starting 2005 the arrival figures from these markets were recorded separately to measure the performance.

In 2005 the collective figure of the markets was 890 visitors, Russia accounting for 44% (392), tallying 26% (227 visitors) from Italy and Scandinavia contributing 30% (271 visitors). In 2006 the collective figure went up to 982 by 92 extra arrivals over year 2005 figure and record increase of 10%. This was reflected by increases from Russia (4.6%, 407 arrivals), Italy (22%, 277 arrivals) and Scandinavia (9%, 279 arrivals)

Majority of the Italian and Scandinavian markets were holiday makers while most of the Russians were more on business visits. Collectively the holiday figure from the markets was higher (447 including VFR) in 2006 and recorded increase by 39.3% over 321 arrivals in 2005.

Russia, Italy & Scandinavia Markets - Total 2006

Purpose	Russia	Italy	Scandinavia	Total
Business	239	81	104	424
Holiday	92	150	161	403
VFR	12	21	11	44
Employ	67	25	18	110
Other	0	0	1	1
Total 2006	410	277	295	982
Total 2005	392	227	271	890
% +/-	4.6	22.0	8.9	10.3
Change	18	50	24	92





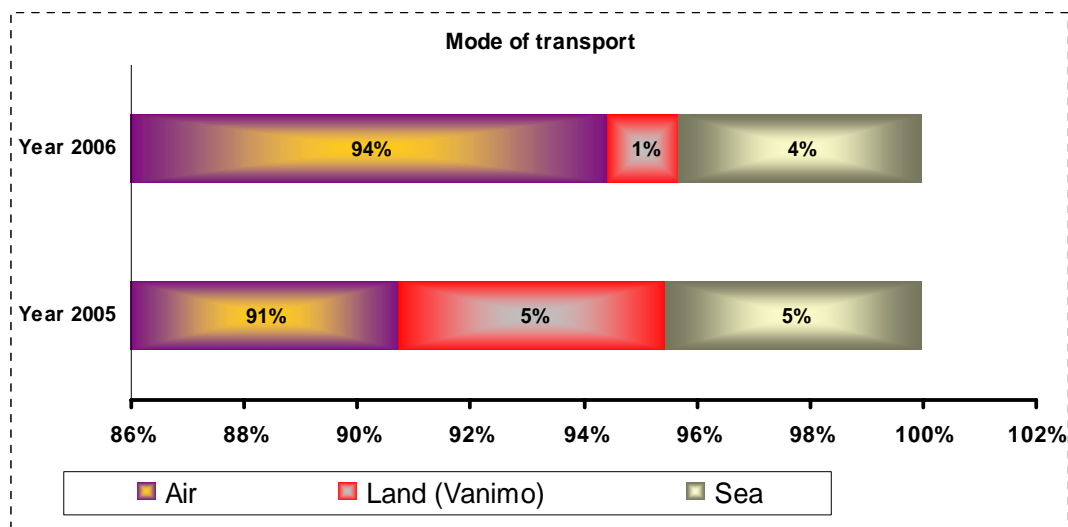
5.3 Mode of transport & port of entry

Mode of transport



One other important sector emerging as a result of TPA's marketing and promotional efforts is the cruise market. From data collected this year, about 8 passenger cruise ships visited Papua New Guinea, several of them making two or three rounds in the year. These ships originated from Australia, Japan, USA, Europe and New Caledonia, thus most of the cruise visitors were from these markets. The sector contributed 4 percent or 3,326 people to the annual total arrivals and recorded 1.4 percent increase as 45 more visitors arrived compared to year 2005. More than 98 percent or 3,275 people were purely holiday makers while the remainder 2 percent came for business and other reasons.

94 percent or 73,259 of the total foreigners arrived by air and 1 percent or 972 people crossed land boarder in Vanimo. Air arrivals number in the year was higher than that recorded in 2005 and an increase in percentage of 11 was recorded.



Mode of Transport by Purpose of visit - 2006

Mode	Business	Holiday	VFR	Other	Total 2006	Total 2005	Change	% +/-
Air	48376	19380	4947	556	73259	65970	7289	11.0
Sea	49	3275	1	1	3326	3281	45	1.4
Land	627	221	118	6	972	3438	-2466	-71.7

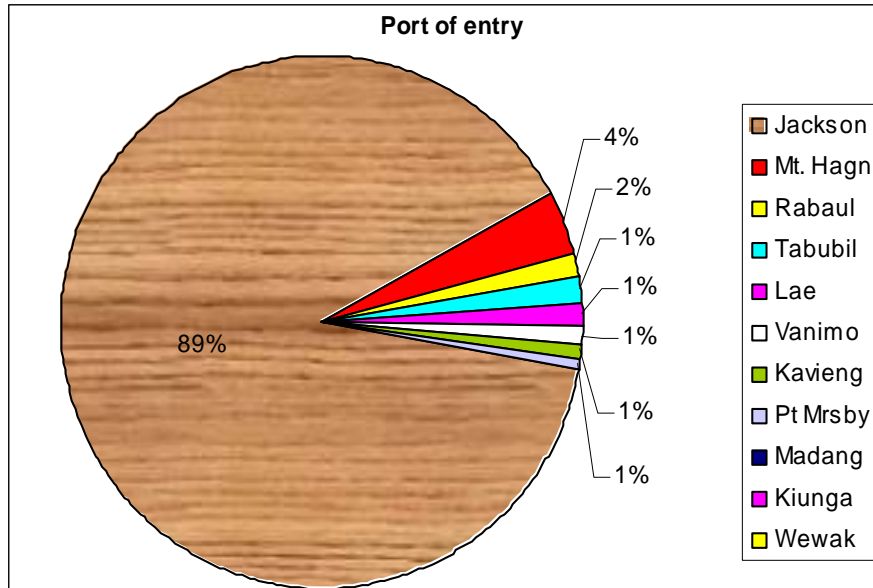
Cruise visitors by country of origin and Purpose of Visit

	Business	Holiday	VFR	Other	Total
Australia	24	781	6	1	807
NZL	4	48	0	0	52
Pacific	0	2	0	0	2
Japan	0	866	0	0	866
China	10	14	2	0	24
Asia	3	0	0	0	3
UK	0	88	0	0	88
Germany	0	100	0	0	100
Scandinavia	0	7	0	0	7
Other Europe	3	213	0	0	216
USA	4	978	1	0	982
Canada	1	178	0	0	179
	49	3275	9	1	3326



Port of entry

Only 11% or 8343 of the international visitors arrived through other smaller ports including Mt. Hagen, Rabaul, Tabubil, Lae and land boarder crossing in Vanimo. Most (89%) or 69,214 of the total arrivals in the year occurred through the country's biggest international gateway (Jacksons Airport).



Visitors that enter through Rabaul, Alotau, Lae, Kavieng, Port Moresby and Madang are those that travel by cruise ships. Arrivals in NCD and Rabaul occur in two separate ports each (air & sea). Although Tokua Airport in Rabaul is not yet declared as international airport, there are charter flights that go direct from Australia to offload and load cruise passengers. All visitors entering these ports are purely holiday makers.

Port of entry					Total	Total	
Port	Business	Holiday	VFR	Other	2006	2005	% +/-
Jackson	44,933	19,216	4,887	178	69,214	52,767	31.2
Mt. Hagn	2,876	28	16	1	2,921	2,981	-2.0
Rabaul	7	1,175	0	1	1,183	2,981	-60.3
Tabubil	961	148	44	3	1,156	766	50.9
Lae	12	1,062	2	0	1,076	1,820	-40.9
Vanimo	580	201	101	4	886	3,438	-74.2
Kavieng	1	633	0	0	634	98	546.9
Pt Moresby	15	387	1	0	403	581	-30.6
Madang	47	19	8	2	76	0	-
Kiunga	0	8	0	0	8	0	-
Wewak	0	0	0	0	0	98	-100.0

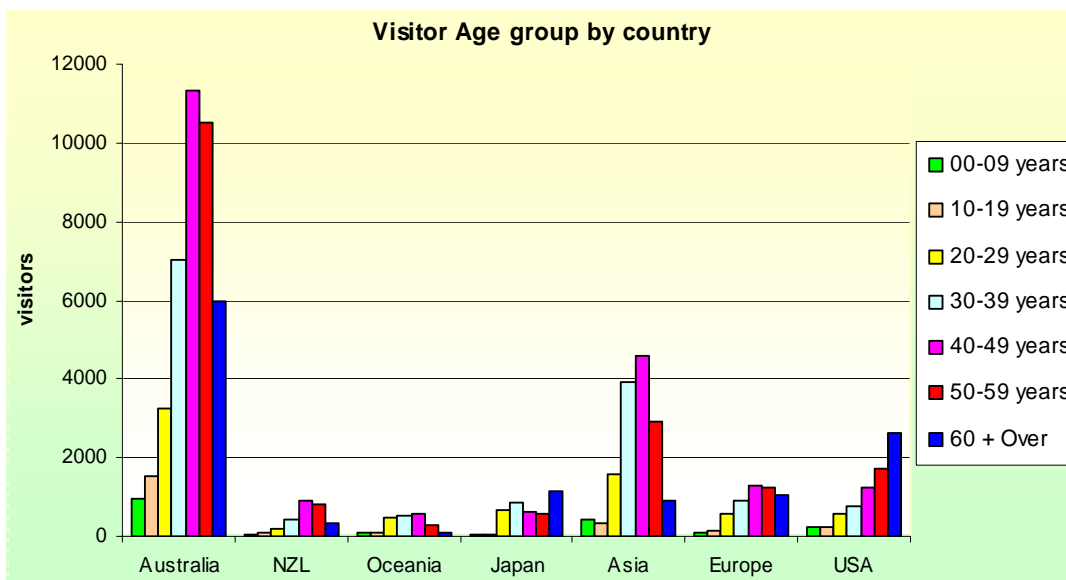
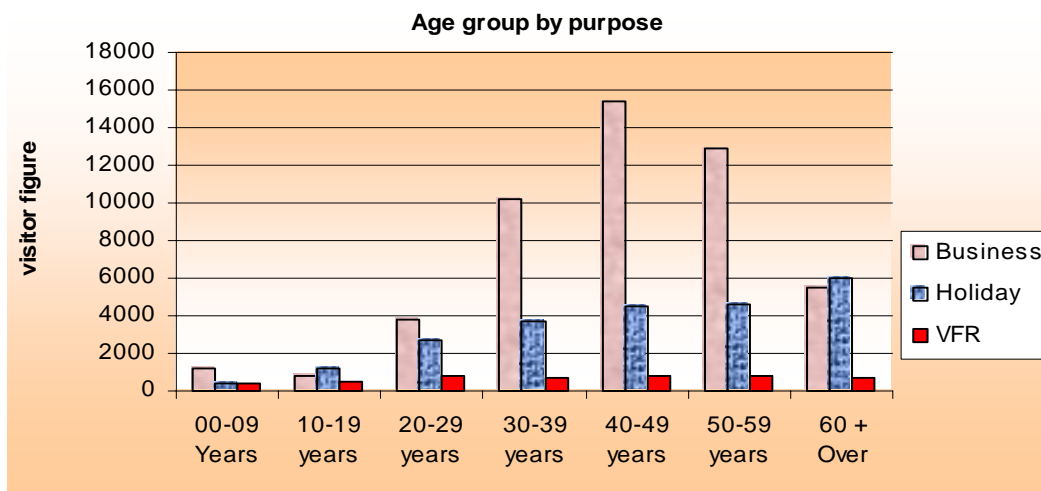


5.4 Age profile

Arrivals to Papua New Guinea in the year were mostly people of ages between 30 and 59 years and accounted for about 69 percent of all visitors. Majority (72 percent) of the visitors from this age group came for business purposes.

Most of the old people, ages 60 years and over, which accounted for 49 percent visited the country for holiday and a higher number (48%) of the young age group between 10 to 19 years were also on holiday. Most of the holiday visitors from Japan, America and Europe fall in the older age category of ages 60 years and over.

The Australian market generated higher number of its visitors from the ages 40-49 years and 50-59 years age categories whereas the Asian market donated most of its visitors from the ages between 30-39 years and 40-49 years age groups.



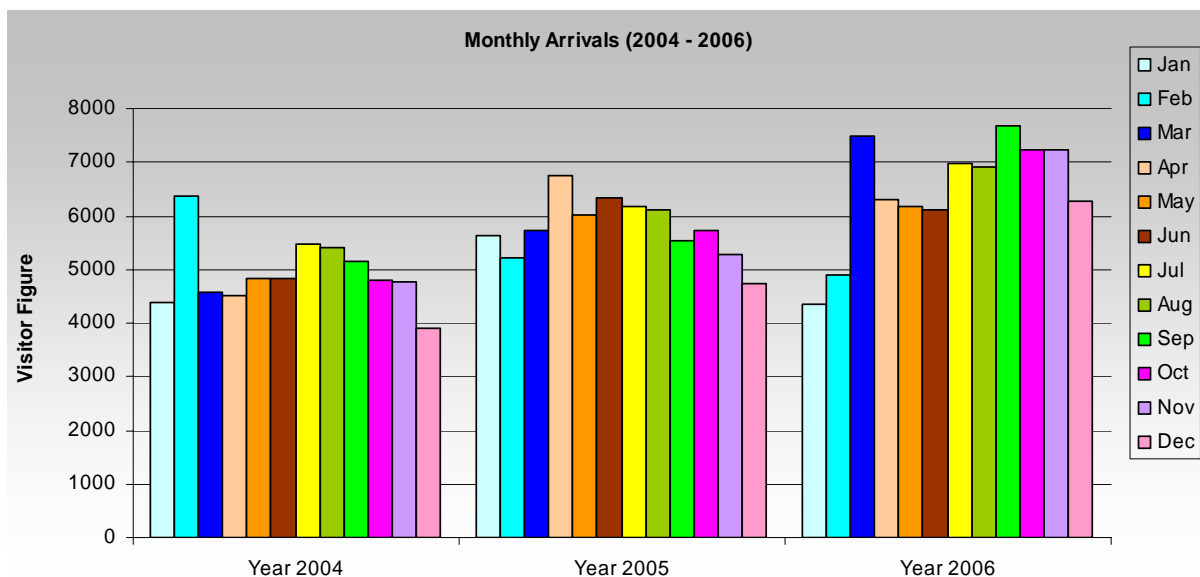
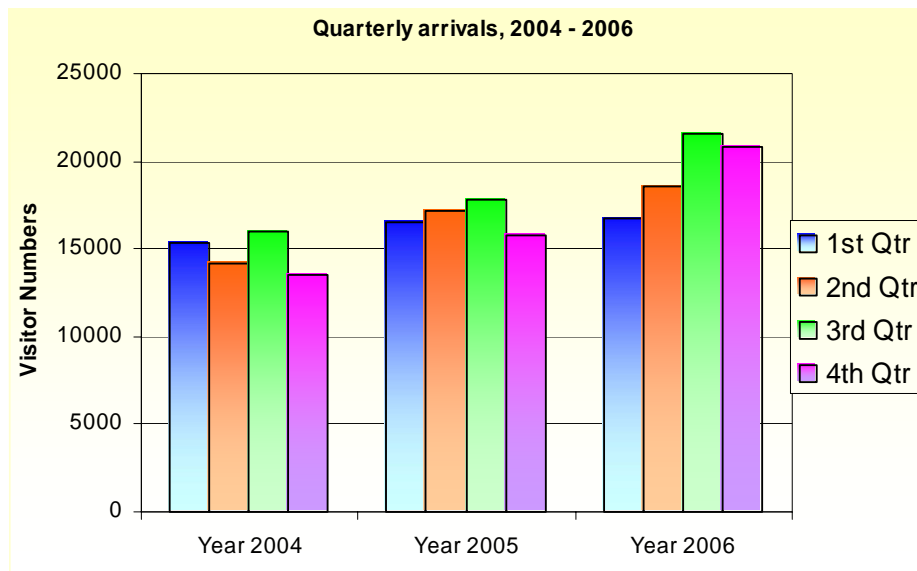


6.0 TRAVEL PATTERN

6.1 Quarterly & Monthly performance

Assessing from the monthly and quarterly arrival trends, more overseas travelers preferred traveling to PNG during the 3rd quarters yearly, particularly September with higher number in arrivals. The cultural events and festivals like the 10th National Mask Festival, Enga, Mt. Hagen and Goroka Cultural Shows, Hiri Moale and Independence Day celebrations hosted around the country in the quarter were the determinant factors for this trend.

Three cruise ships that visited PNG within March in 2006, bringing purely holiday visitors have pushed the month's figure to record higher number than that of the past. The charts below show quarterly and monthly performance in 2004, 2005 and 2006.





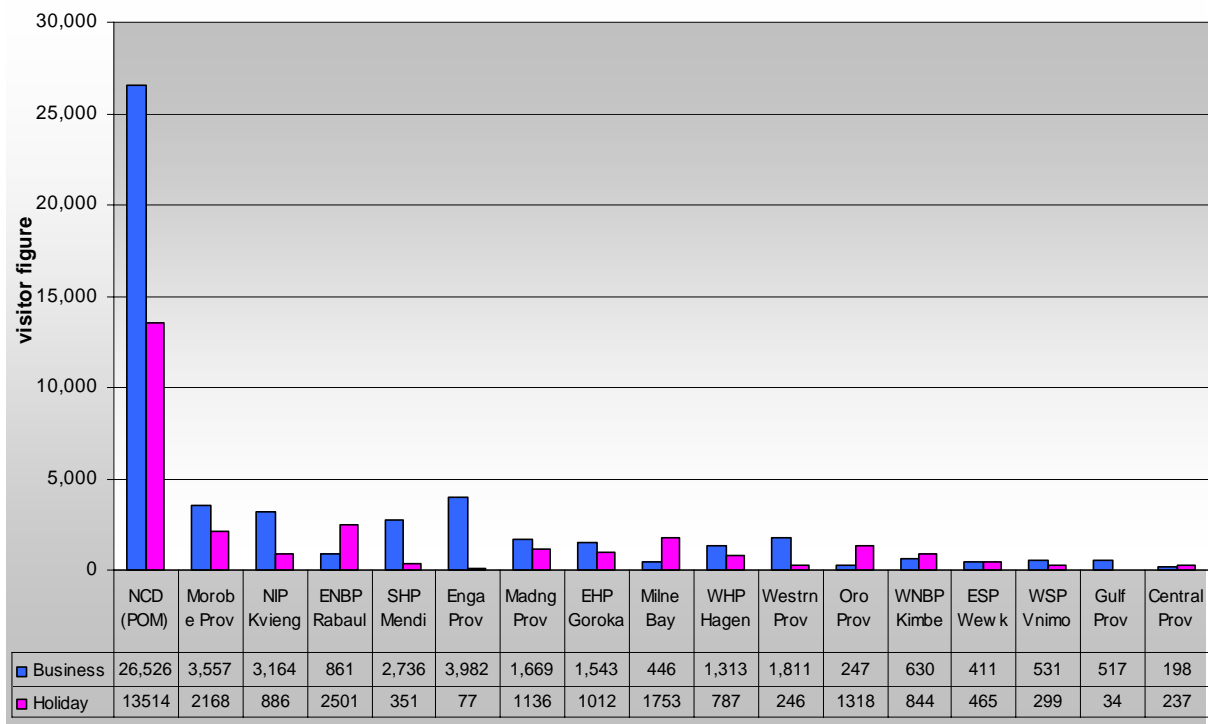
6.2 Provincial Visitation

Most of the international visitors were popular in the nation’s capital (NCD) with numbers peaking at 40,128 or more than half of the total. It should be noted that Port Moresby is the major entry and exit point for international visitors, and not all visitors that arrive through the port remain but many travel out to other provinces.

As Port Moresby also being the main business center for the country the business visitor numbers is higher than the other provinces. Most of the foreigners that traveled to Southern Highlands (88.5%) and Enga (97.4%) were mainly for business due to the mining operations and increase in extraction of other mineral resources in those areas.

Provincial government and local people in a province that have knowledge of the benefits of tourism participate aggressively in the tourism activity, creating safer and clean environment for travelers, hence such province receive more holiday travelers. The coastal provinces are seen to be more involved and seriously competitive in the tourism business as more holiday travelers skew towards the region every year. In 2006 provinces including East New Britain (74%), Milne Bay (79.7%), and Oro (84%) received more holiday visitors than business.

Provinces visited by purpose

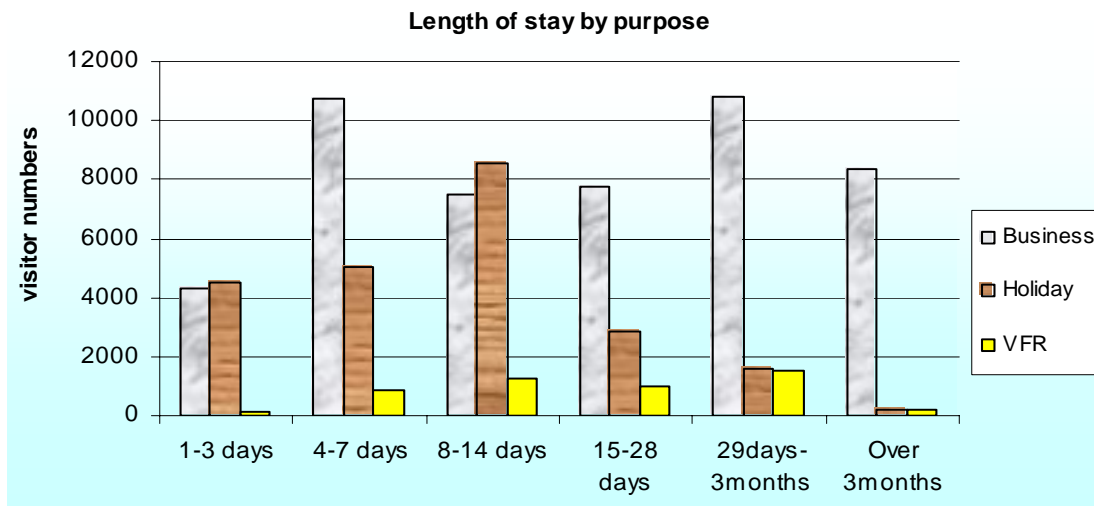
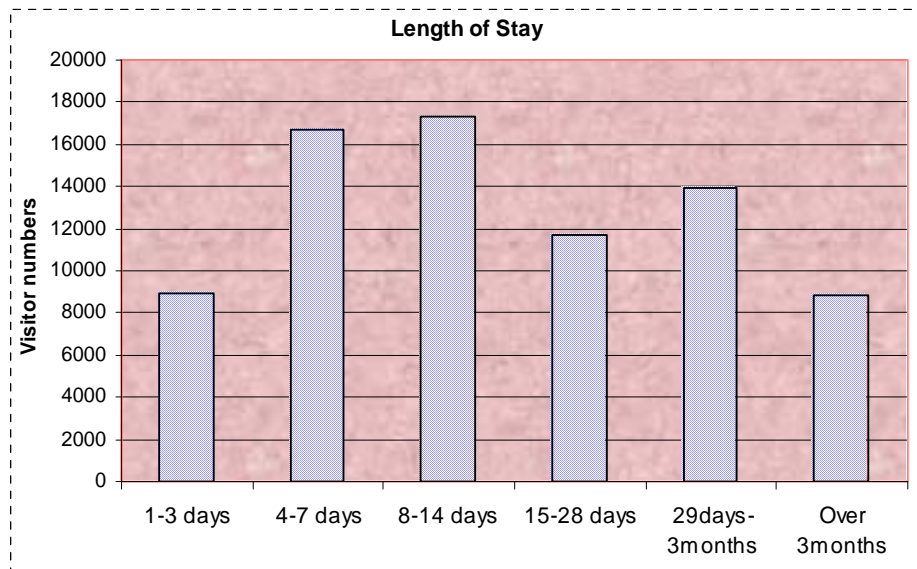


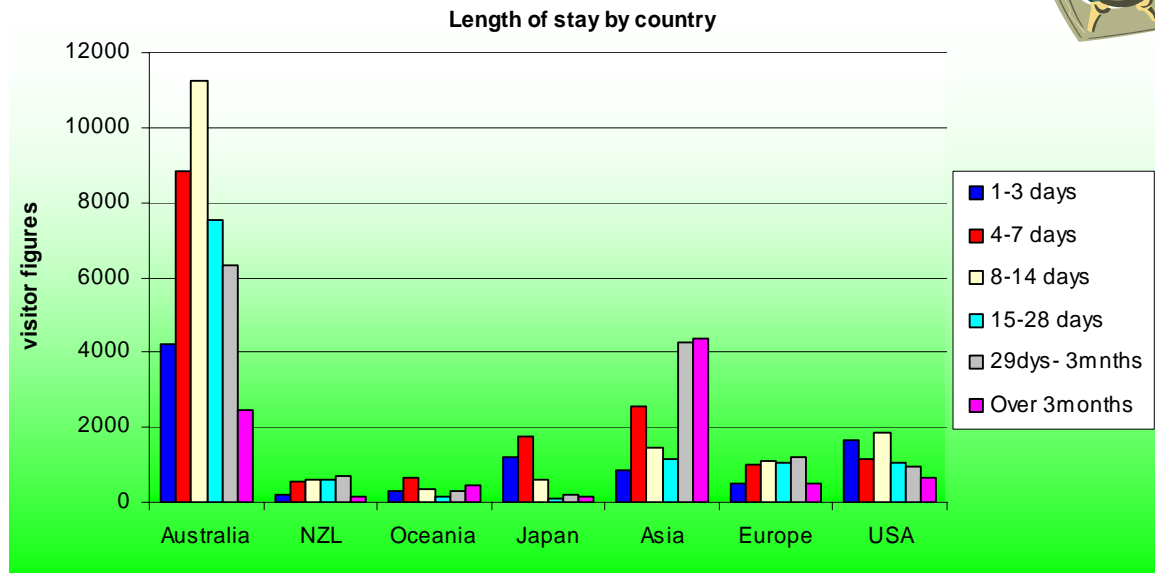


6.3 Length of Stay

The most common length of stay of all foreign visitors in PNG in 2006 was 4-7 days and 8-14 days. There were also many visitors that favored the 29 days to 3 months.

Holiday visitors stayed shorter periods than did business travelers who tend to travel for longer length of 29 days to three months and over. Most of the Holiday visitors spend the 4-7 days and 8-14 days period. Visitors from the Asian market decided to stay for longer periods. The Americas and the Japanese were more popular for the shorter length of stay below 14 days. Visitors from the European and New Zealand markets were evenly distributed in all the duration between 4-7 days and 29 days to 3 months, whereas most of the Australians concentrated in the 8-14 days period.





7.0 Finishing Notes

7.1 Findings

From the data collected and analyzed it has been identified that:

- a) Visitor arrivals through other smaller ports are growing;
- b) Number of cruise ships to the country is also increasing;
- c) There are direct international flights to ports like Tokua-Raul and Gurney-Alotau;
- d) Most or all of the holiday travelers are concentrated towards the coastal regions and the people in the region, to some extent, understand the benefits of tourism and participate in the tourism business.

7.2 Recommendations

Based on the findings it is recommended to the government and private organizations that:

- a) wharfs in the other smaller ports and port facilities should be improved to encourage more cruise ship visits to the country;
- b) airports like Tokua and Gurney needed to be developed into international ports and Air Niugini or Airlinespng or other competing airlines to schedule direct international flights to and from the ports;
- c) the provincial administrators and individuals in the highlands provinces should now wake up and learn why coastal provinces are more advanced in infrastructure development and living standard.

7.3 Conclusion

Tourism development and growth is the quickest and simplest way to increase GDP and employment, with inbound visitors injecting foreign exchange directly into the economy.

Papua New Guinea has a great potential as we have some of the most beautiful natural sceneries in the world. We have thousand kilometers of untouched beaches, some of the most stunning mountains and valleys, complex, but rich bio-diversity areas and nature parks ever found equal to any where in the world. In addition and most importantly, we have rich, vibrant, living culture and art and thousands of archaeological and historical sites scatted throughout the country which bears witness to migration history of this nation. We also have abundant War relics, which were left over from the 2nd World War.

These are our major products, and Tourism Promotion Authority with proper recognition by the government and implementing and working inline with the government policies will be able to develop them and continue to attract international buyers. Thus, increasing the international visitor arrivals figure and place PNG competitive to other Pacific Island countries.