



# VISITORS ARRIVALS SUMMARY

## 2009



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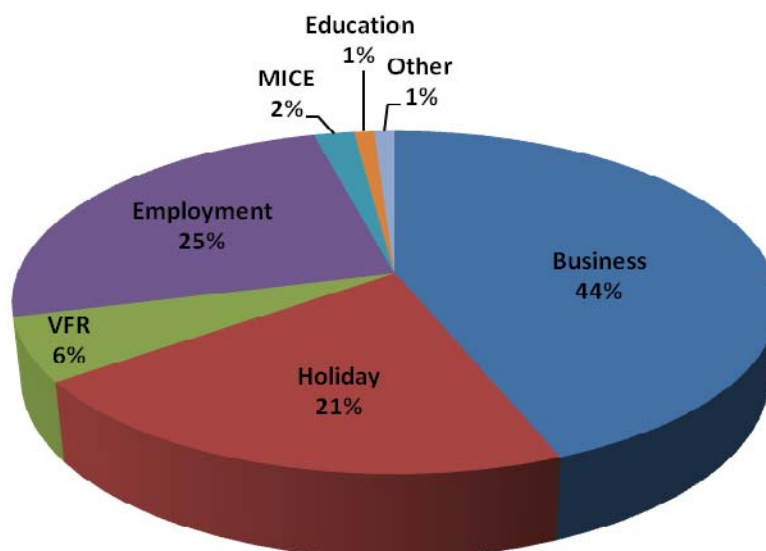
This is the final total visitor arrivals report for PNG in 2009.

The report presents the trends and market share analysis of all short-term international visitors, strongly emphasizing on holiday visitors. It is reported by **source market** and **purpose of visit** to the country. The report also presents summary tables and graphical analysis of annual and monthly trends to observe historical performance of tourism in the year compared to the previous years. Additional marketing briefs are also included based on recent research to compliment the visitor arrivals trend from the key source markets.

### ***Executive Summary***

Total international arrivals to Papua New Guinea were recorded at 125,891 visitors in 2009. This was a slight increase of 4.8 percent compared to the 120,139 visitor arrivals in 2008. The highest growth was experienced from the employment, education and VFR sectors, while business and holiday arrivals decreased by 0.7% and 12% respectively. The negative growth in the business and holiday segments was as a result of the global financial crisis which greatly affected global tourism. There was also the presence of swine flu threat amongst our key source markets including Japan, USA and Europe. PNG was also greatly affected by the plane crash in Kokoda which saw trekking numbers decrease dramatically by more than 30 percent. Out of the total arrivals, Holiday represented 21%, Business 44%, VFR 6%, Employment 25%, MICE 2%, Education and Others at 1% each. The cruise ship sector recorded a total of 5,560 visitors to PNG in 2009.

#### **Percentage Distribution by Purpose of Visit – 2009**

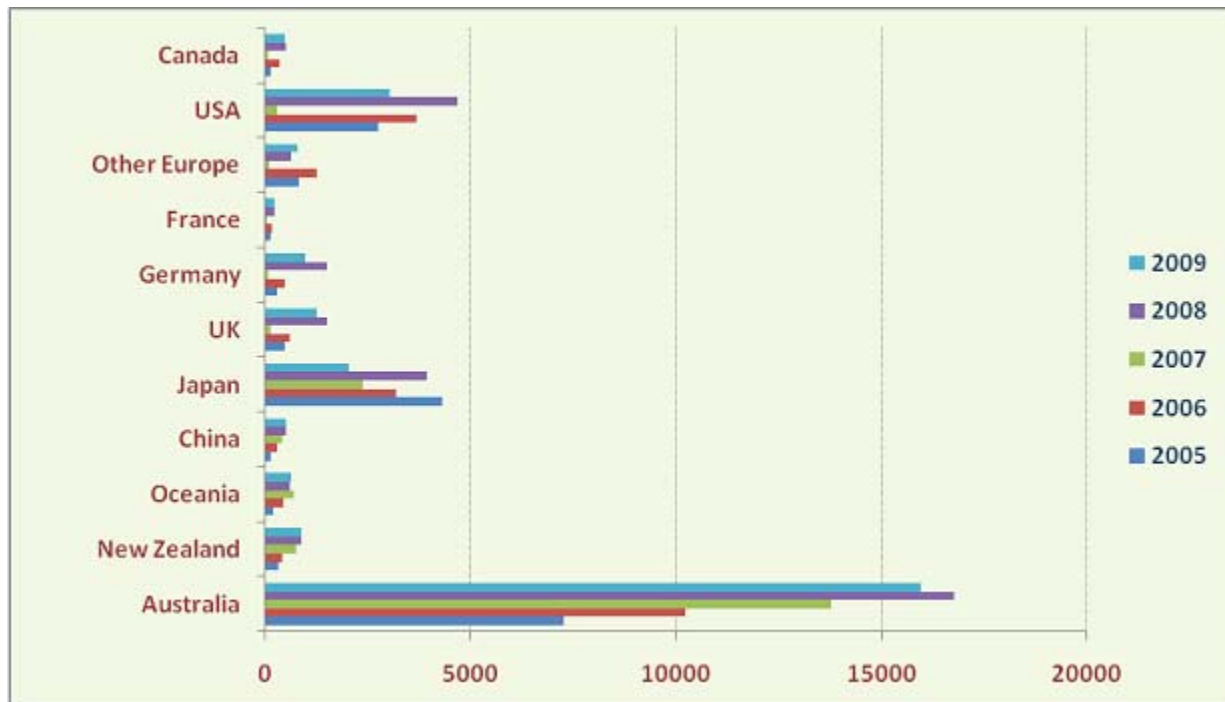


Most of the visitors from Japan (67%), America (44%) and European markets (40%) were strongly holiday/leisure-oriented, while the majority of the visitors from Australia (45%) and Asia (41%) were more on business. However, the holiday segments of the Oceania, NZ, Asian, and other European markets increased in 2009 compared to 2008 (refer to table).

### Holiday Arrivals by Source Markets – 2009/2008

Source Market	2008	2009	Change	% +/-
<i>Australia</i>	16,663	15,973	-690	-4
<i>New Zealand</i>	852	862	10	1
<i>Oceania</i>	592	631	39	7
<i>China</i>	496	509	13	3
<i>Japan</i>	3,934	2,032	-1,902	-48
<i>Malaysia</i>	457	420	-37	-8
<i>Philippines</i>	562	1,489	927	165
<i>Indonesia</i>	165	210	45	27
<i>India</i>	190	284	94	49
<i>Other Asia</i>	621	534	-87	-14
<i>UK</i>	1,474	1,235	-239	-16
<i>Germany</i>	1,493	980	-513	-34
<i>France</i>	226	224	-2	-1
<i>Other Europe</i>	929	785	-144	-16
<i>USA</i>	4,746	3,012	-1,734	-37
<i>Canada</i>	482	457	-25	-5
<i>Other America</i>	77	95	18	23
<i>Africa</i>	103	178	75	73
<i>Russia</i>	151	94	-57	-38
<i>Italy</i>	162	145	-17	-10
<i>Scandinavia</i>	187	128	-59	-32
<i>Israel</i>	60	72	12	20
<i>Total Holiday</i>	<b>34,622</b>	<b>30,349</b>	<b>-4,273</b>	<b>-12</b>

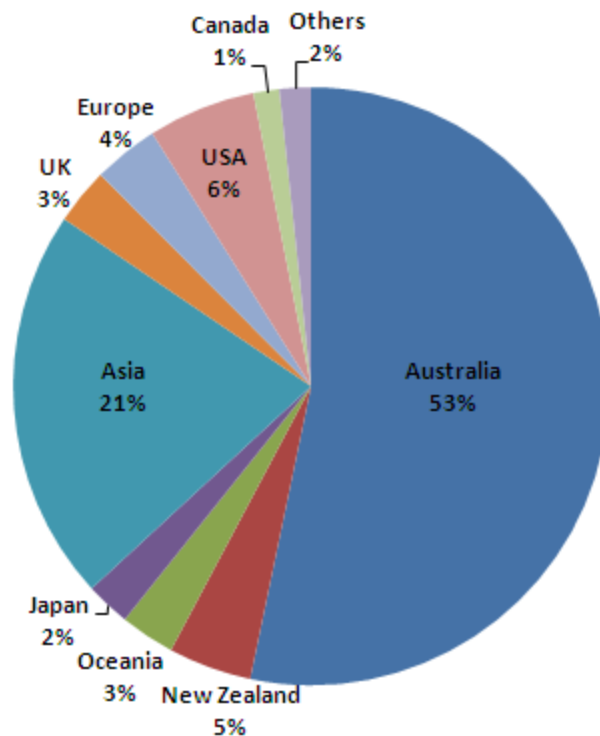
### Annual Holiday Arrivals Trend by Source Market (2005 – 2009)



The negative growth from the holiday market was a result of the global economic crisis and the presence of swine flu threat amongst our key source markets including Japan, USA and Germany, while New Zealand, China and other closer Asian and Oceania markets continue to show healthy growth. Some of the internal factors affecting our holiday arrival numbers were; the closure of the Kokoda Track for sometimes in early 2009, some flight cancellation by our airlines companies, high cost of travel and bad media publicity. The safety concern of our third party airlines in PNG has also pose a threat amongst potential visitors after the airlines PNG crashed in Kokoda.

On the total holiday arrivals, 62 percent were from the Australian market, followed by the US Market with 9 percent and Japan with 6 percent. The total European holiday visitors made up 9 percent, the Asian market accounted for 6 percent while Oceania, New Zealand and other smaller markets accounted for 8 percent of the total holiday arrivals in 2009.

**Holiday Arrivals Distribution by Source Market - 2009**



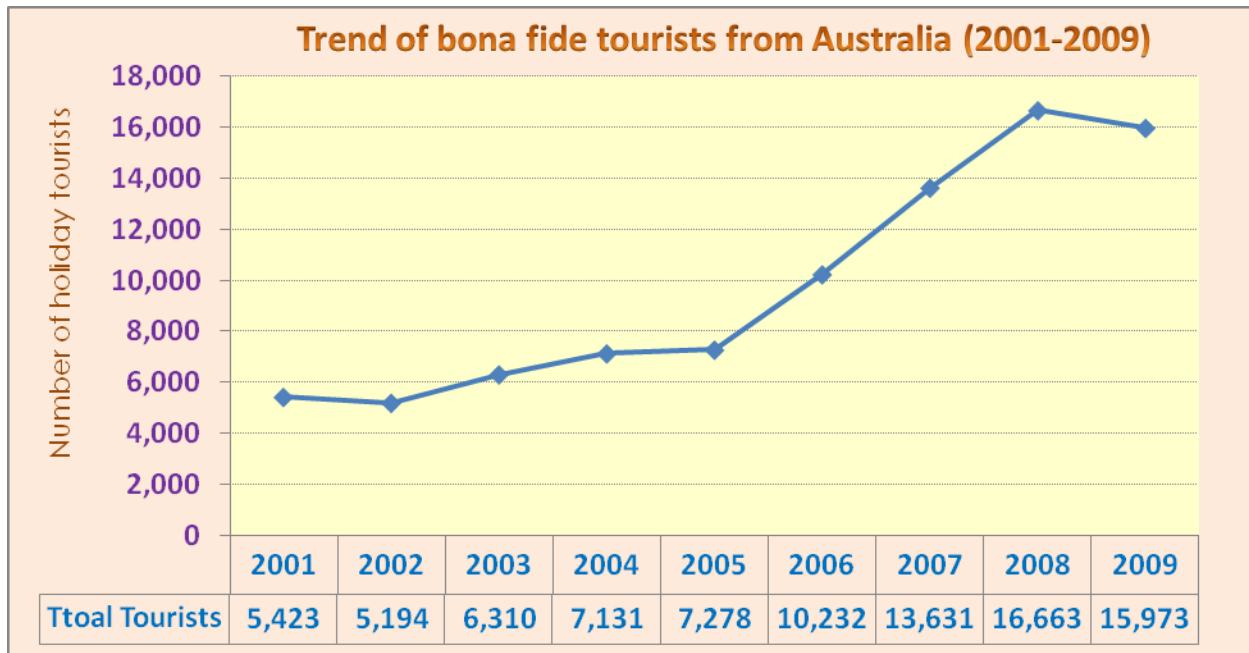
**1.2 Key Source Market Performance**

***Australian Market***

The Australian market continued to remain the highest single source market (in all segments) for Papua New Guinea. It accounted for 53 percent (67,070) of the total arrivals, recording an increase by 12.6% compared to the 2008 arrivals.

Most of the visitors from the Australian market were on business visits (44%), while 23% accounted for holiday. The business segment from the Australian market recorded an increase by 6 percent, while holiday arrivals decreased by 4 percent compared to 2008 arrivals.

### Annual trend of holiday arrivals from the Australian Market



As it can be seen above, strong growth in holiday arrivals from the Australian market is from 2005 to 2008 and that is a result of the opening of the new office in Sydney. The TPA office in Sydney was able to carry out more marketing activities targeting tourists from all around Australia. One of it being the development of a comprehensive website for visitors to browse through and make travel decisions. In May 2009, the TPA Board appointed another new marketing representative and the new team have come up with new marketing techniques to be implemented in 2010 and increase the holiday arrivals for the Australian market.

### ***Japan Market***

About 3 percent (3,051) of the total arrivals were from Japan. Total visitor arrivals from the Japanese market decreased by about 38% percent compared to 2008 total arrivals. Most of the visitors from the market were holidaymakers (67%), while only few (23%) came for business and 10% for other reasons. Most of the increase from the Japan market was attributed by cruise ship visitors which accounted for 20% of the total arrivals from the market.

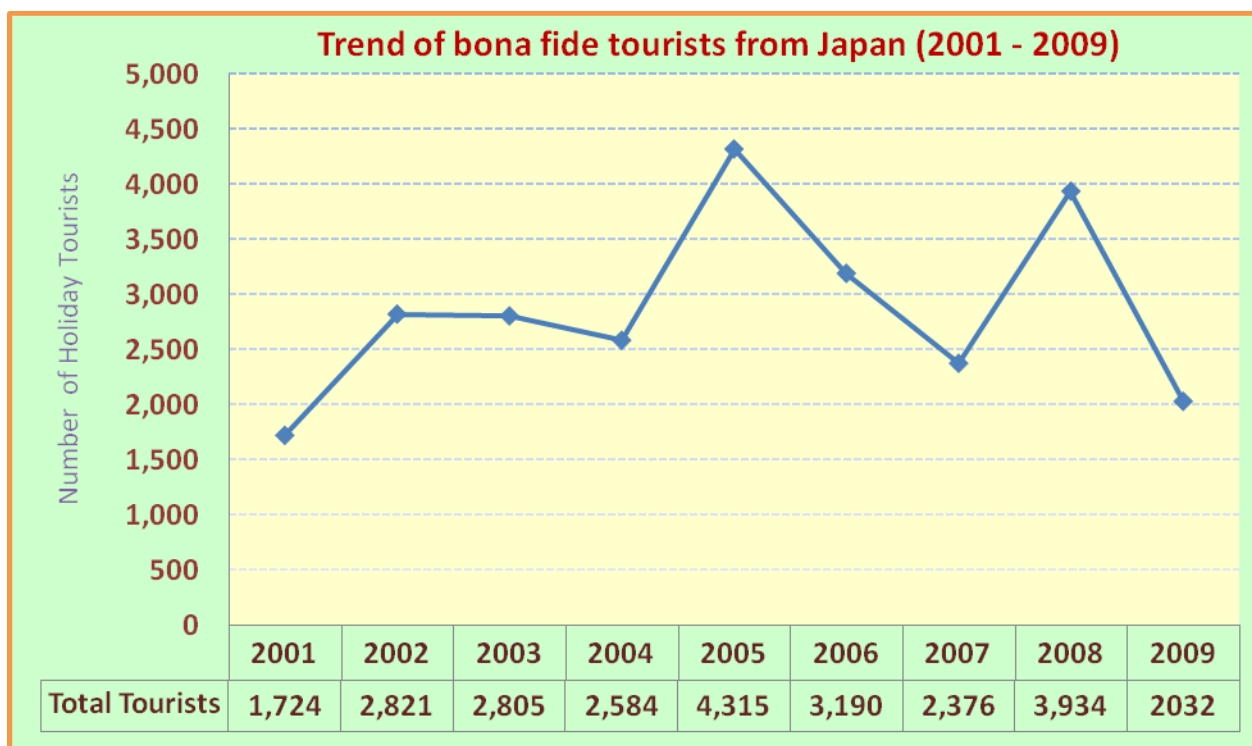
For holiday, Japan also recorded a drop of 48% in 2009 compared to the total holiday arrivals in 2008. The reason for the drop was a result of the global financial crisis and the presence of swine flu threat, which affected the outbound travel.

Referring to the graph below, an upward trend developed in 2005 for the Japanese tourist arrivals into Papua New Guinea. However, in 2006 and 2007 PNG lost its tourists market share by 26% and 25% respectively.

The reason for the drop in tourist arrivals from the Japanese market was due to a drop in outbound travel in 2006 and 2007, which affected most of the long-haul destinations (including Australia & New Zealand and the Pacific Island countries). There has been a shift in offshore travel to Asia over the last three years, away from traditional longer-haul destinations. Papua New Guinea recording the loss in 2006 and 2007 was also contributed by the drop in cruise ship arrivals from the Japan market, together with some PX cancellation in those years from this market.

The upward trend in 2008 from the Japan Market is a sign of the efforts put in by the new marketing representative appointed by the PNG Tourism Promotion Authority Board in 2007. The new marketing strategies put together for the market will start to boost the number of tourists in 2010 and beyond as the market fully recovers from the financial crisis.

### **Annual trend of bona fide tourists from the Japanese Market**

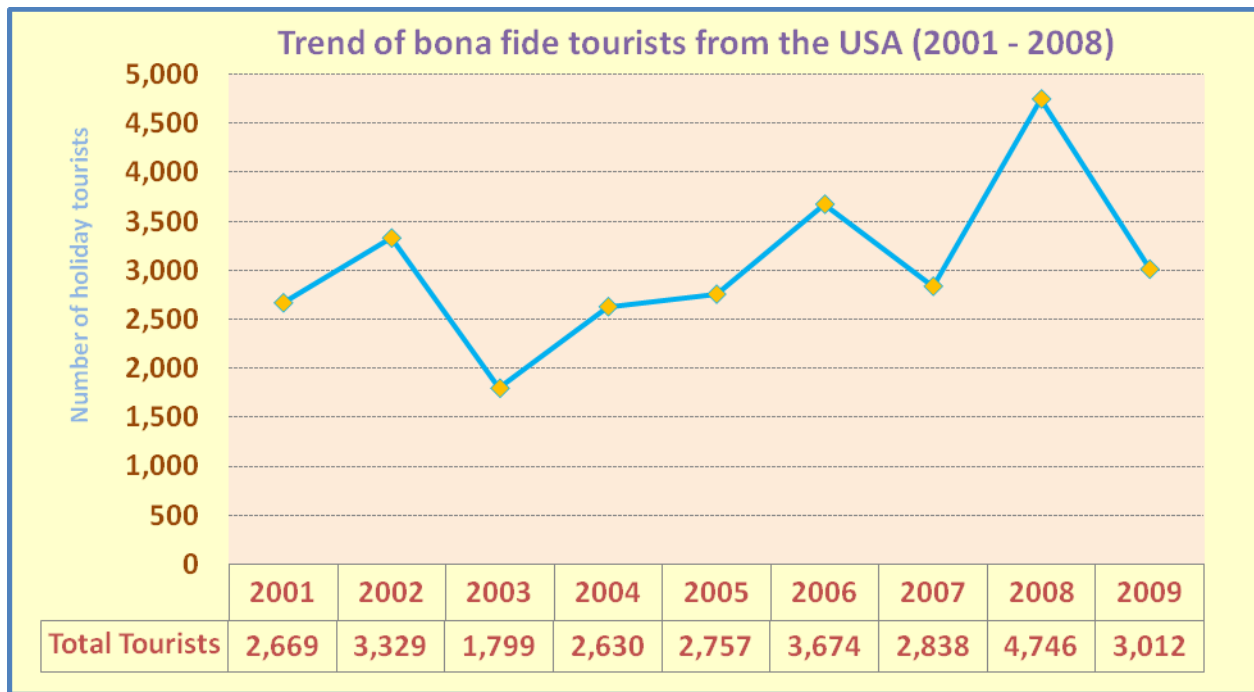


### ***American Market***

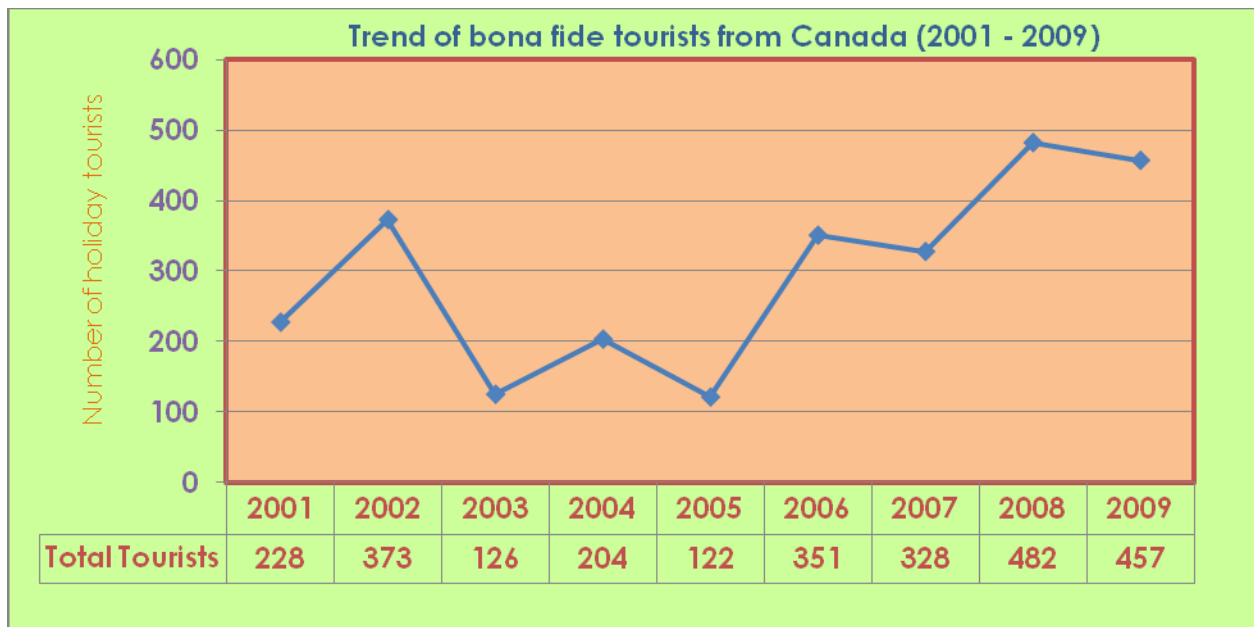
The American market collectively generated about 7% (9,092) of the aggregate arrivals, reflecting a decrease by 11% from 10,291 arrivals in 2008.

Most of the visitors from the US market were older age people who came mainly for holiday. However, the holiday segment in this market has also decreased compared to 2008. The drop in visitor numbers was due to the financial crisis that affected many destinations around the world.

## Annual trend of bona fide tourists from the American Market



As it can be clearly seen, the trend in holiday tourists from the US market picked up well since 2003, but dropped in 2007 by 23% due to the down turn in the US economy. The US economy has fallen into a deep recession in 2008, and the entire world tourism market has suffered. However, Papua New Guinea has benefited in 2008, recording a strong growth due to the stable PNG Kina and the strong marketing efforts put in by TPA in this market to resist any unforeseen threats in the future. Below is a similar holiday arrivals trend from the Canadian market.

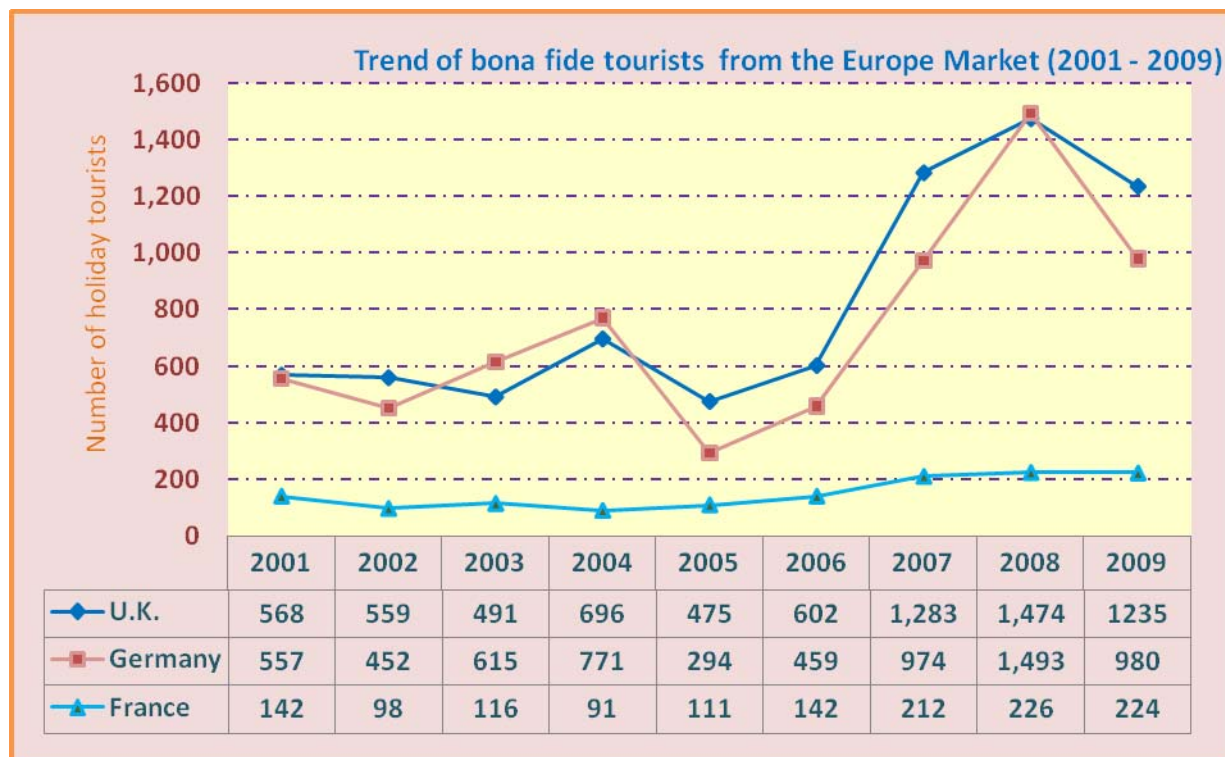


## Europe

The collective European markets accounted for 7% percent (8,308) of the total arrivals. United Kingdom represented 46 percent (3,845) of arrivals from the market, Germany generated 19 percent (1,590) and France accounted for 7 percent (574), while the other European markets contributed 28 percent to the total Europe arrivals.

Even though there was a drop of 24 percent in the European markets in 2005 compared to 2004, it picked up exceptionally well in 2005, 2006 and 2007. In 2008, the healthy growth continued with UK, Germany and France recording an increase by 15%, 54% and 7% respectively.

### Annual trend of bona fide tourists from the European Market



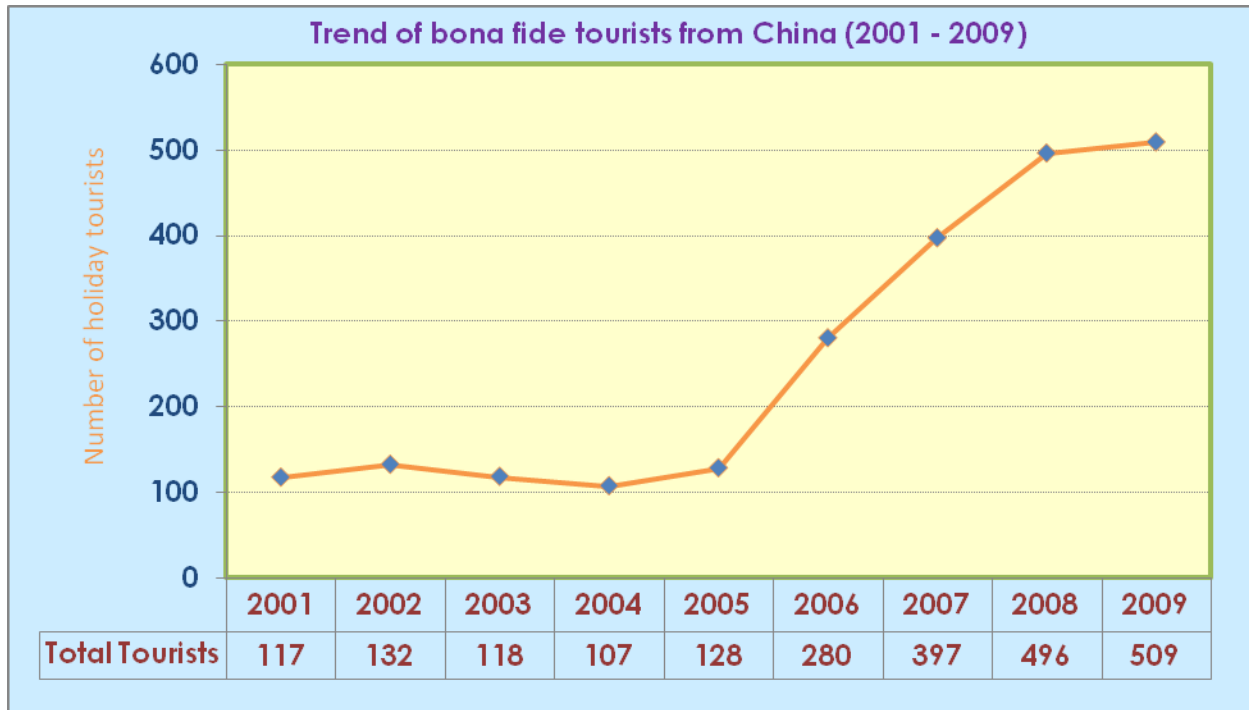
It can be clearly seen from the trend that the markets performed well in 2004, 2006, 2007 and 2008, while a drop on bona fide tourists was experienced in 2005 as a result of the growing terrorism threats amongst the European countries.

In 2006 and 2007 terrorism threats have slowed and most Europeans gained confidence and wanted to travel to long-haul destinations of choice. Most of the bona-fide tourists traveling to PNG were motivated by the PNG Tourism Promotion Authority's effective marketing and promotions of tourism products in the region. The notable one was the inviting of more travel writers and film crews from Europe both by TPA and industry partners to channel the tourism products to targeted consumers in the region and participating in travel/trade shows to generate demand amongst wholesalers/retailers from Europe. In 2009, the European market did not perform to expectation as a result of the global financial crisis and other threats in the region.



## Annual trend of bona fide tourists from the Chinese Market

In the Asian region, China is a potential market for Papua New Guinea and represents 5% of the total arrivals. There was a drop in holiday visitors from the collective Asian market in 2009, but the Chinese market continued to maintain the upward trend that was developed since 2005. As it can be seen from the trend below, the steady growth which started in 2005 is expected to continue in the future due to the signing of the Approved Destination Status (ADS) between PNG and China, and also PNG TPA's future plan to develop marketing strategies in the Chinese market and carry out marketing activities in Chinese language will boost tourist arrivals from the market.

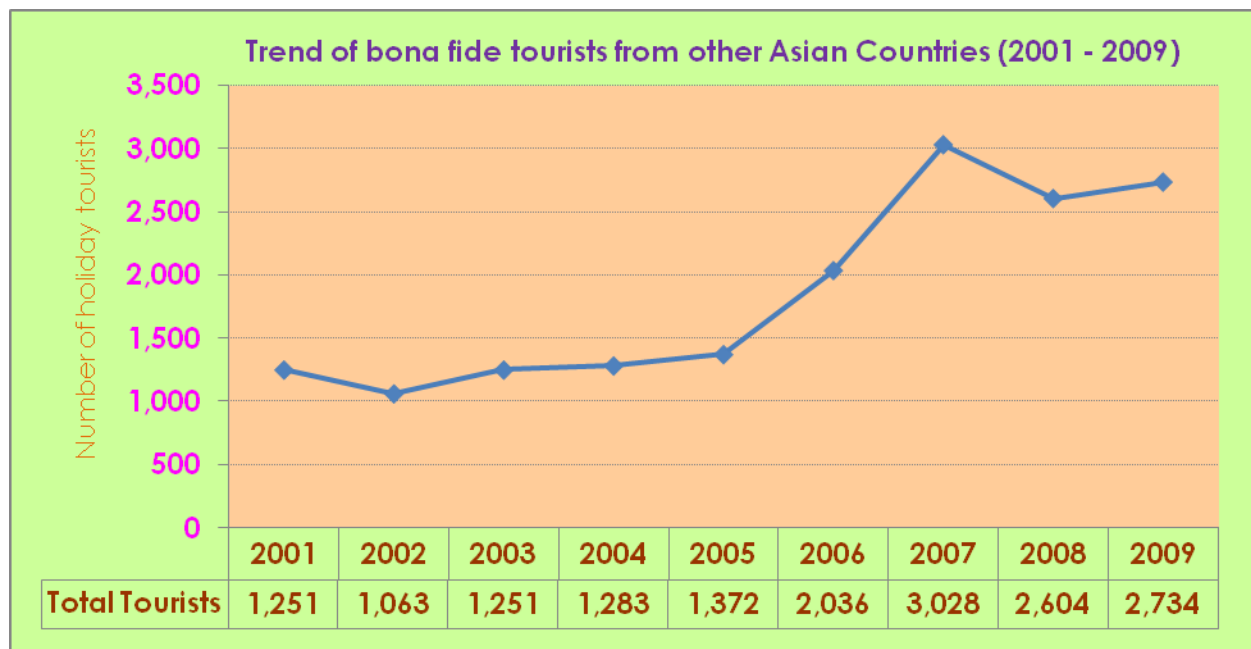


### ***Other Asian Markets***

The other Asian markets collectively represented 16 percent of the total arrivals (20,358), with an increase of 4 percent compared to the total arrivals in 2008.

A higher number of the visitors were age between 30-39 and 40-49 years. Most of the visitors from the Asian markets visited for business and employment reasons. However China and other Asian markets recorded an increase in holiday arrivals in 2009 compared to 2008. The increase in holiday figures from China or Africa could not be real as most of those coming for business or employment might register as holiday visitors to avoid cost on visa, but the fact that we must accept is that China is PNG's potential market in the Asian region after signing the Approved Destination Status (ADS) between the two countries. Therefore, future marketing activities in the Chinese market and other Asian markets will boost holiday tourists from the Asian region. Please refer to the holiday arrivals trend from the Asian collective markets on the next page.

## Annual trend of bona fide tourists from the Asian Market



As seen from the trend above, a significant growth was experienced from the Asian markets since 2003; however, in 2008 there was a drop of 14% due to the global economic crisis, which affected most of the emerging Asian and the Pacific Island countries. The economic crisis has posed uncertainties in the exchange rate in destinations around the globe causing fear amongst potential travelers as they become concern over the purchasing power of their currency in other countries.

As a result of the global economic crisis, most countries around the world have lost their tourism market share while others including Papua New Guinea survived. The steady growth in tourist numbers from the major source markets was due to the stable economic condition in PNG combined with a strong marketing and promotional efforts put in by the PNG Tourism Promotion Authority in the key source markets. For PNG, only the collective Asia and the Oceania recorded a decrease in holiday visitors in 2008, which slowly picked up in 2009 and expect to pick up strongly in 2010 and beyond.

### ***Oceania***

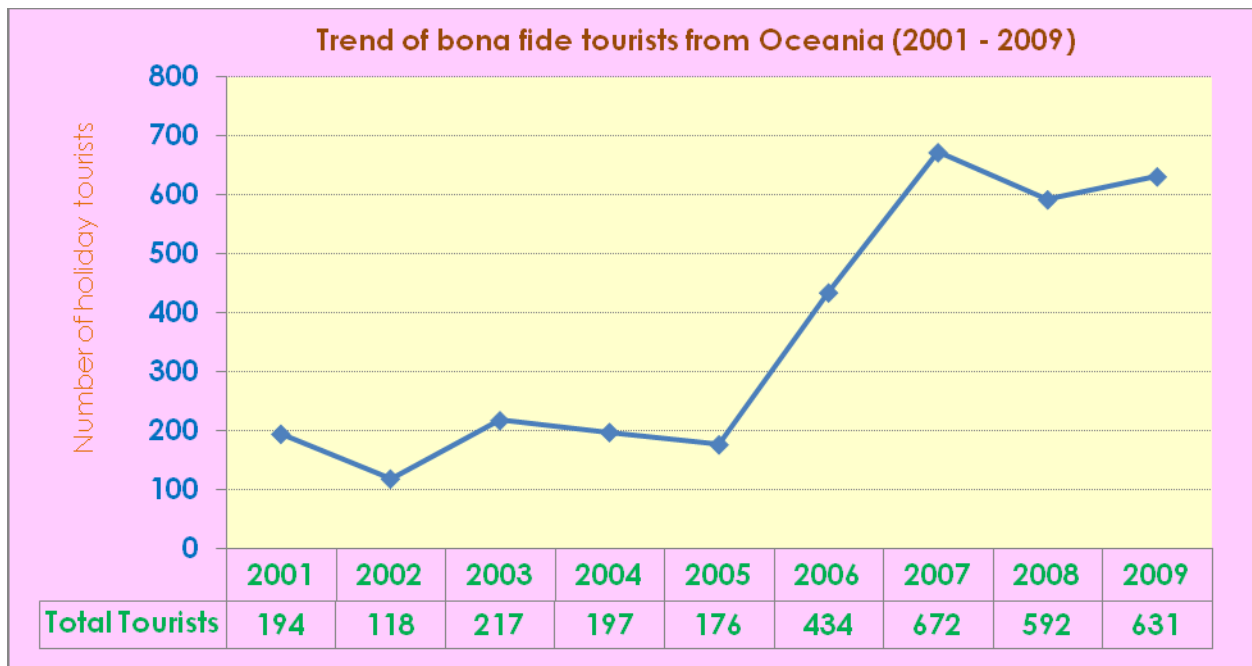
Arrivals from Oceania in 2009 indicated an 8 percent decrease compared to the total arrivals in 2008. Most of the visitors from this market came for business reasons (35%), while 17 percent visited for holiday. However, the holiday segment also increased by 7% for this market.

### ***New Zealand***

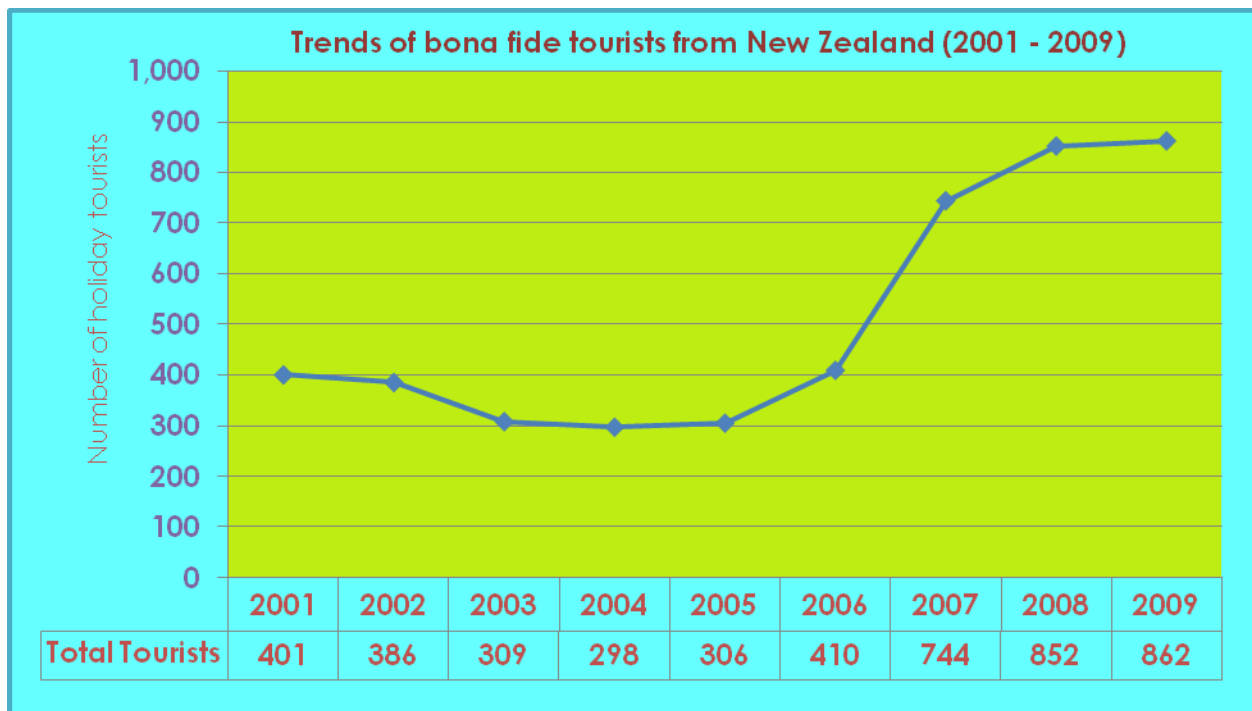
New Zealand contributed about 4.5 percent (5,671) of the total arrivals in 2009, which was an increase of 2.5% compared to 2008. Both the holiday and business segments recorded increase with the holiday segment showing a significant increase by 1% compared to the 2008 holiday arrivals.

*Please refer to the tourists arrival trends on the next page.*

## Annual trend of bona fide tourists from the Oceania Market



## Annual trend of bona fide tourists from the New Zealand Market

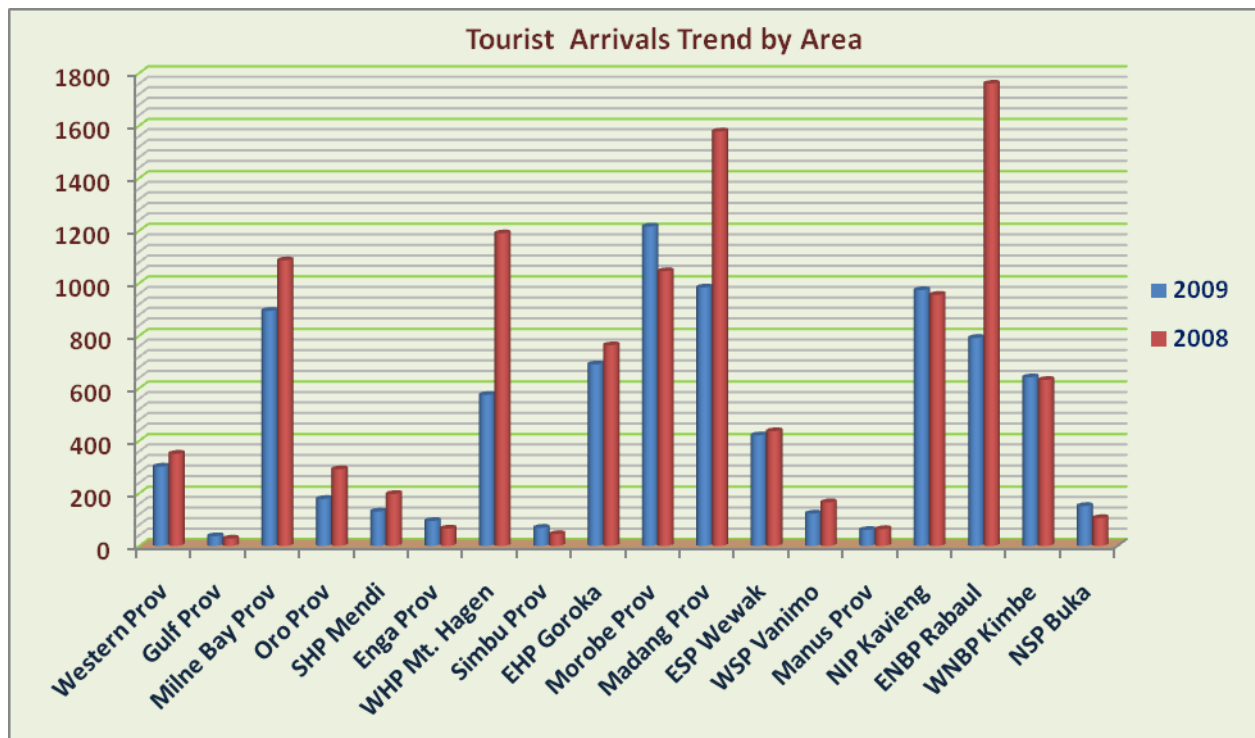


The holiday market from New Zealand picked up slowly in 2004 and 2005, and in 2006 and 2007, the upward trend continued on a higher note, recording an increase of 34%, while in 2008 the performance continued the upward trend, which show an increase of 12% compared to the 2007 holiday arrivals.

The increase was a result of opening the new TPA office in Sydney and the new web-site development, where a lot of quality promotion was done (through this office) to attract more Australian and New Zealand tourists.

### 1.3 Areas Visited by Tourists in PNG

Main Area	2009	2008	Change	% +/-
Western Prov	302	351	-49	-14
Gulf Prov	37	28	9	32
Central Prov	356	445	-89	-20
NCD (POM)	10107	10743	-636	-6
Milne Bay Prov	895	1087	-192	-18
Oro Prov	179	292	-113	-39
SHP Mendi	131	198	-67	-34
Enga Prov	95	66	29	44
WHP Mt. Hagen	575	1190	-615	-52
Simbu Prov	69	45	24	53
EHP Goroka	691	764	-73	-10
Morobe Prov	1216	1046	170	16
Madang Prov	984	1578	-594	-38
ESP Wewak	421	437	-16	-4
WSP Vanimo	123	166	-43	-26
Manus Prov	61	64	-3	-5
NIP Kavieng	974	956	18	2
ENBP Rabaul	1,933	3,793	-968	-49
WNBP Kimbe	642	632	10	2
NSP Buka	152	106	46	43



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## Tourism Receipts (Estimate)

*According to the information from our Visitor Exit Survey:*

Total visitor expenditure in 2009 is estimated to be **K1.7 billion**, which is an **increase of 8%** compared to the **K960 million** spent by visitors in 2008. Out of the total, it is estimated that genuine tourists have spent a total of **K360 million**, a decrease of **5%** or **K20 million** less spending in Papua New Guinea, compared to the **K380 million** spent by holiday-makers in 2008. The decrease in expenditure by holiday makers is a direct result of the 12% drop in our holiday arrivals in 2009 compared to 2008, as a result of the global financial crisis and other international and domestic factors.

However, the PNG Kina was stable during the global financial crisis and tourists decided to spend more in PNG, thus, contributing significantly to the national economy.

*Total Tourist Expenditure by Market Area (in 2009)*

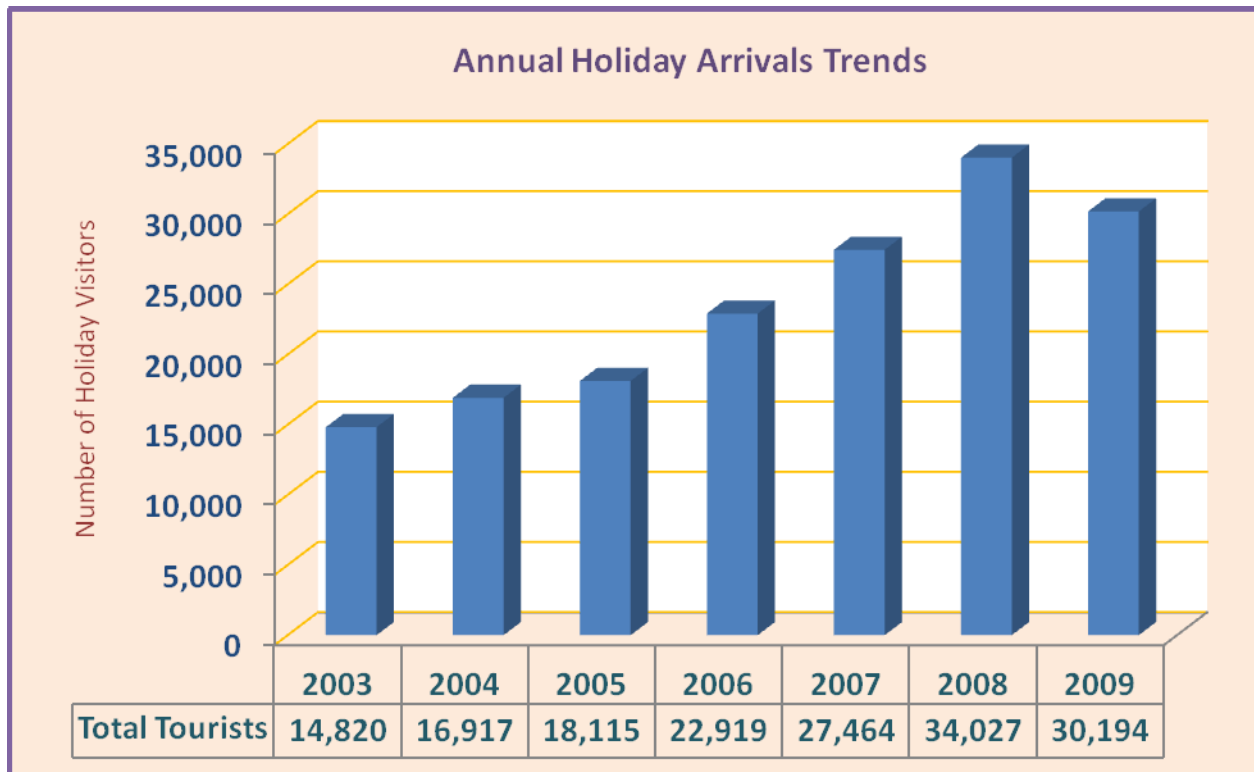
Country	Average length of Stay	Tourist Arrivals	Daily Expdt.	Average /Head Expenditure		Total Expenditure		%tage Share
				Kina	US\$	Kina	('000 US\$)	
Australia	13	14,738	872	11,336	4,191.80	167,069,968	50,120,990	46
New Zealand	14	818	1,107	15,498	5,725.00	12,677,364	3,803,209	3.1
Pacific Islands	28	630	190	5,320	2,678.87	3,351,600	1,005,480	1.7
Japan	11	1,461	1,500	16,500	6,096.75	24,106,500	7,231,950	8.6
China	14	504	857	12,000	4,434.00	6,048,000	1,814,400	1.6
Singapore	10	191	1,150	11,500	4,249.25	2,196,500	658,950	0.5
Philippines	14	577	913	12,786	4,724.43	7,377,522	2,213,256	4.8
Other Asia	14	1,153	712	9,968	3,683.17	11,493,104	3,447,931	1.6
United Kingdom	21	651	775	15,500	5,727.25	10,090,500	3,027,150	4.9
Germany	20	541	986	19,722	7,287.27	10,669,602	3,200,880	4.9
France	16	200	1,281	20,500	7,574.75	4,100,000	1,230,000	1.2
Other Europe	14	599	1,357	19,008	7,023.45	11,385,792	3,415,737	3.8
USA	16	2,154	1,088	17,410	6,433.25	37,501,140	11,250,342	13.4
Canada	25	255	466	11,667	4,310.95	2,975,085	892,525	1.5
Africa	12	130	833	10,000	3,695.00	1,300,000	390,000	0.5
Other Countries	19	480	1,078	20,500	7,574.75	9,840,000	2,952,000	1.9
<b>Total Average</b>	<b>16.3</b>	<b>25,082</b>	<b>947.81</b>	<b>14,326.00</b>	<b>5,338.12</b>	<b>359,324,732.00</b>	<b>107,797, 419.60</b>	<b>100</b>

## Conclusion

Holiday Arrivals in the past years (2003, 2004, 2005, 2006, & 2007) have been growing and the increase of 25% in 2008 marked the sixth consecutive growth, but in 2009 the holiday figures decreased by 12% as a result of the global financial crisis and other threats in our key source markets. However, the PNG Kina was stable during the global financial crisis and more tourists decided to stay longer and spend more in PNG, thus contributing significantly to the national economy.

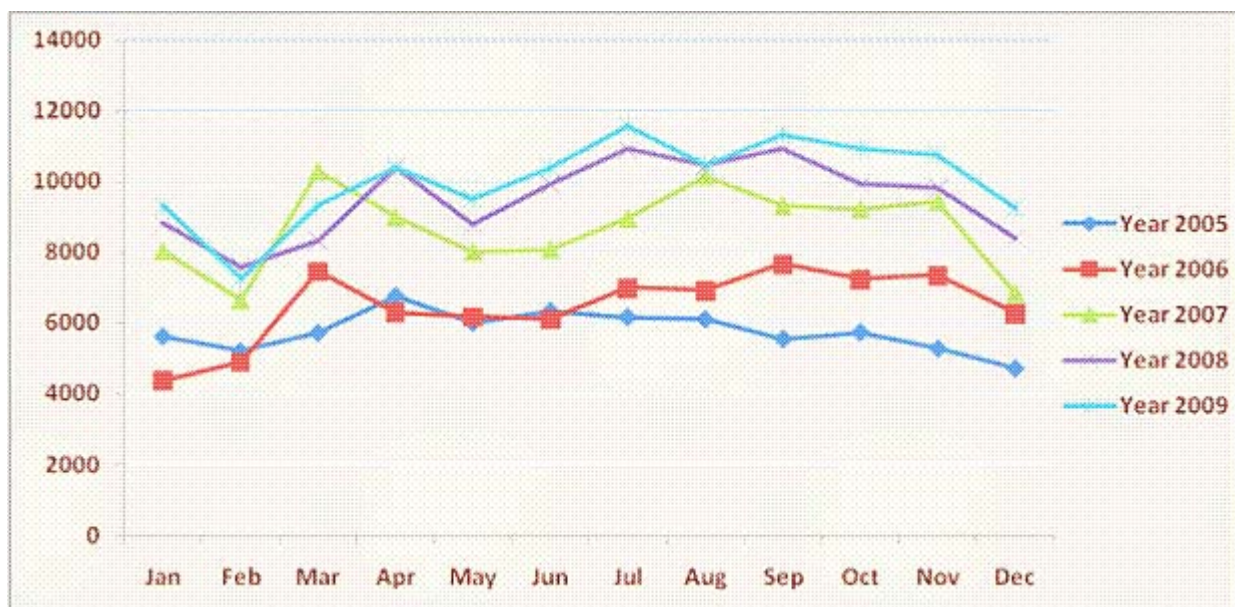
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## Annual Holiday Arrivals Trends



As seen from the graph above, the healthy growth in 2008 marked the sixth (6<sup>th</sup>) consecutive year to see an increase of international holiday arrivals since 2003. This consecutive growth shows the efforts put in by TPA under a very sound and effective marketing and promotions carried out by TPA in the key source markets. In 2009, the trend was affected by the global financial crisis, which saw world tourism decreased by 4% according to the World Tourism Organization (UNWTO).

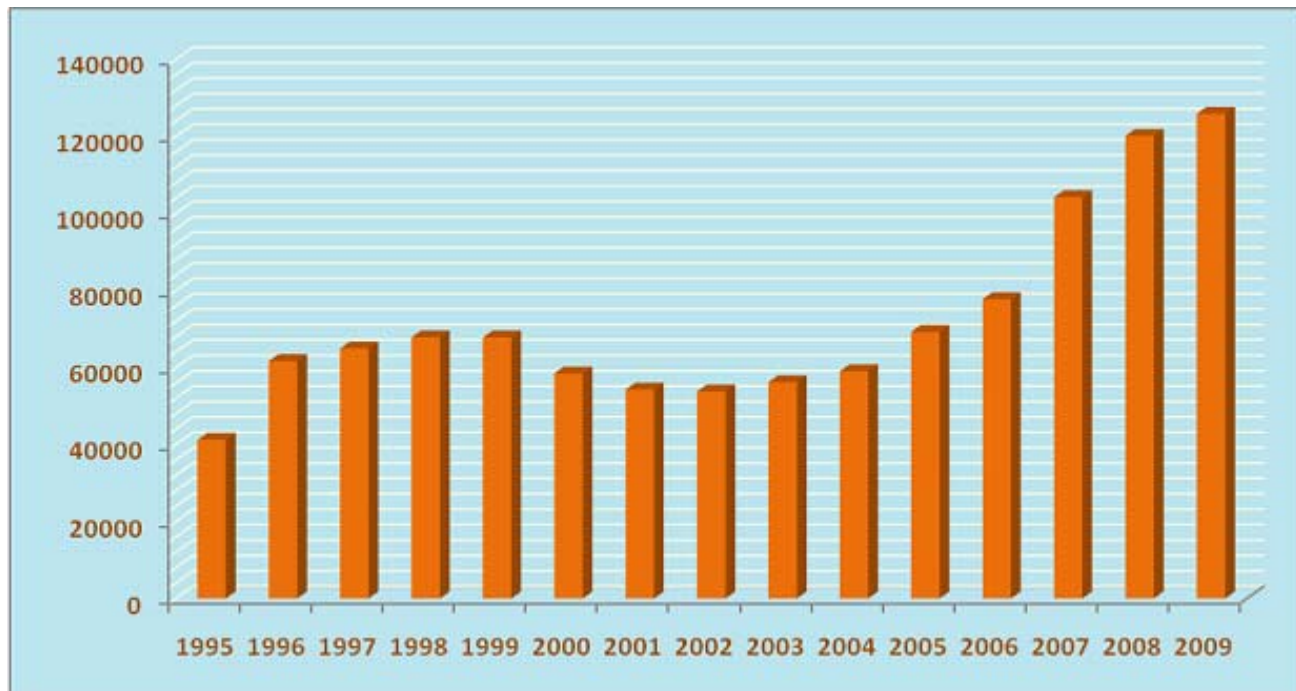
## Monthly Visitor Arrivals Trend (2005 – 2009)



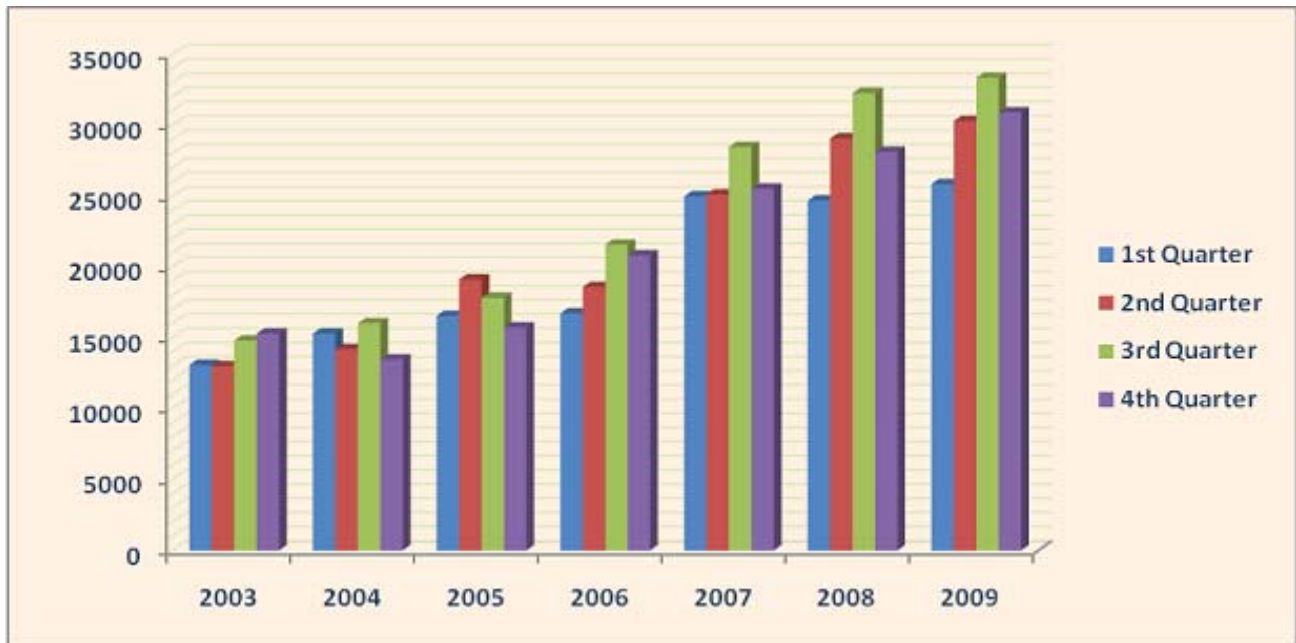
## 2009 Visitor Arrivals Summary Table

Visitors Arrival Analysis											
		Total - 2009						January - December			
Country	Busins	MICE	VFR	Holiday	Emplynt	Educatn	Other	Total 2009	Total 2008	Chnge	% +/-
Australia	29897	897	5244	15973	14154	660	245	67070	59572	7498	12.6
New Zealand	3035	121	262	862	1328	34	29	5671	5532	139	2.5
Oceania	1290	367	374	631	654	325	75	3716	2873	843	29.3
China	2385	35	154	509	3327	35	40	6485	5428	1057	19.5
Japan	717	25	46	2032	219	9	3	3051	4940	-1889	-38.2
Korea	434	21	29	134	164	11	5	798	789	9	1.1
Malaysia	2455	45	165	420	1852	40	12	4989	4777	212	4.4
Singapore	503	10	31	197	135	25	0	901	836	65	7.8
Philippines	2641	40	305	1489	3636	56	52	8219	7665	554	7.2
Indonesia	867	43	43	210	639	25	9	1836	2007	-171	-8.5
India	1123	16	81	284	855	36	9	2404	2284	120	5.3
Other Asia	560	37	52	203	347	6	6	1211	1197	14	1.2
United Kingdom	1714	42	138	1235	657	34	25	3845	4450	-605	-13.6
Germany	327	21	46	980	185	22	9	1590	2306	-716	-31.0
France	238	17	16	224	71	3	5	574	531	43	8.1
Netherlands	186	7	33	144	119	4	1	494	425	69	16.2
Other Europe	640	29	77	785	261	6	7	1805	1793	12	0.7
USA	2314	105	300	3012	957	129	92	6909	8027	-1118	-13.9
Canada	862	14	60	457	337	15	24	1769	1933	-164	-8.5
Other America	207	11	10	95	89	2	0	414	331	83	25.1
Africa	418	18	40	178	214	12	4	884	958	-74	-7.7
Russia	222	5	9	94	88	0	2	420	527	-107	-20.3
Italy	74	3	5	145	67	1	1	296	340	-44	-12.9
Scandinavia	163	6	15	128	57	5	3	377	469	-92	-19.6
Chile	8	4	2	4	2	0	1	21	46	-25	-54.3
Israel	68	1	0	72	0	0	1	142	103	39	37.9
<b>Total 2009</b>	<b>53348</b>	<b>1940</b>	<b>7537</b>	<b>30497</b>	<b>30414</b>	<b>1495</b>	<b>660</b>	<b>125891</b>	<b>120139</b>	<b>5752</b>	<b>4.8</b>
<b>Total 2008</b>	<b>53648</b>	<b>2442</b>	<b>6603</b>	<b>34719</b>	<b>21359</b>	<b>1039</b>	<b>329</b>	<b>120139</b>			
<b>Change</b>	<b>-300</b>	<b>-502</b>	<b>934</b>	<b>-4222</b>	<b>9055</b>	<b>456</b>	<b>331</b>	<b>5752</b>			
<b>% +/-</b>	<b>-0.6</b>	<b>-20.6</b>	<b>14.1</b>	<b>-12.2</b>	<b>42.4</b>	<b>43.9</b>	<b>100.6</b>	<b>4.8</b>			

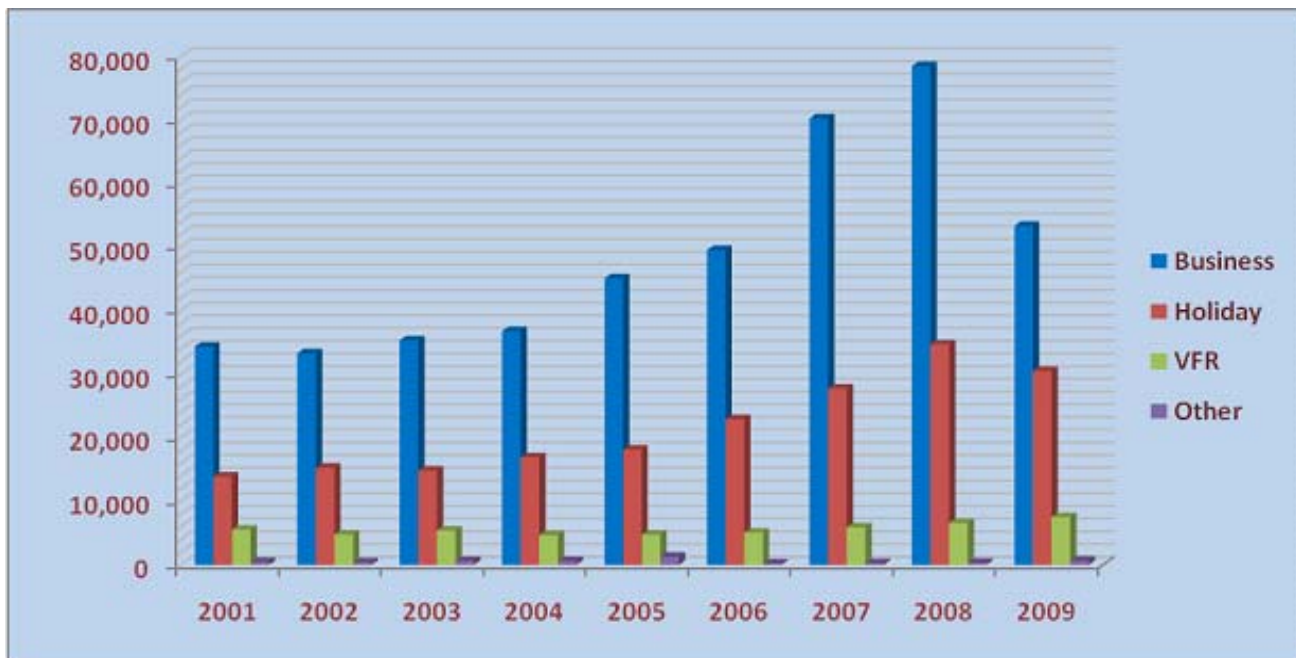
### Annual Total Visitor Arrivals Trend (1995 – 2009)



**Quarterly Visitor Arrivals Trend (2003 – 2009)**



**Annual Visitor Arrivals Trend by Purpose of Visit (2001 – 2009)**



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## Annual Visitor Arrival Forecasts in the next five years (2010 – 2015)

Year	BUSINESS	% +/-	HOLIDAY	% +/-	VFR	% +/-	OTHER	TOTAL	% +/-
2002	33,276		15,285		4,762		347	53,670	
2003	35,339	6.0%	14,820	-3.0%	5,395	13.0%	631	56,185	4.6%
2004	36,796	4.0%	16,917	14.0%	4,671	-13.0%	629	59,013	5.0%
2005	45,098	23.0%	18,115	7.0%	4,762	2.0%	1,275	69,250	17.3%
2006	49,547	10.0%	22,919	27.0%	5,075	7.0%	189	77,730	12.2%
2007	70,241	42.0%	27,737	21.0%	5,917	17.0%	227	104,123	34.0%
2008	78,488	12.0%	34,719	25.0%	6,603	12.0%	329	120,139	15.4%
2009	87,197	11.1%	30,497	-12.2%	7,537	14.1%	660	125,891	4.8%
<b>2010*</b>	<b>89,512</b>	<b>6.5%</b>	<b>48,881</b>	<b>17.0%</b>	<b>7,797</b>	<b>8.2%</b>	<b>671</b>	<b>146,861</b>	<b>10.0%</b>
<b>2011*</b>	<b>95,024</b>	<b>6.2%</b>	<b>55,962</b>	<b>15.0%</b>	<b>8,394</b>	<b>7.6%</b>	<b>842</b>	<b>160,222</b>	<b>9.1%</b>
<b>2012*</b>	<b>100,536</b>	<b>5.8%</b>	<b>63,043</b>	<b>13.0%</b>	<b>8,991</b>	<b>7.1%</b>	<b>1,013</b>	<b>173,583</b>	<b>8.4%</b>
<b>2013*</b>	<b>106,048</b>	<b>5.4%</b>	<b>70,124</b>	<b>11.0%</b>	<b>9,588</b>	<b>6.6%</b>	<b>1,184</b>	<b>186,944</b>	<b>7.6%</b>
<b>2014*</b>	<b>111,560</b>	<b>5.2%</b>	<b>77,205</b>	<b>10.0%</b>	<b>10,185</b>	<b>6.2%</b>	<b>1,355</b>	<b>200,305</b>	<b>7.1%</b>
<b>2015*</b>	<b>117,072</b>	<b>4.9%</b>	<b>84,286</b>	<b>9.2%</b>	<b>10,782</b>	<b>5.8%</b>	<b>1,526</b>	<b>213,666</b>	<b>6.7%</b>

**Note: Figures in bold (2010\* - 2018\*) are forecasts.**

The trends in the last five years have been positive, and the holiday segment from most of our key source markets have been performing well. Most of the growths in visitor arrivals were within our target and that is to double the holiday figures every five years. However, the year 2009 did not perform well due to the global financial crisis as most potential and experienced travelers around the globe were cutting back on travel budgets and if they have to travel, they traveled within short distances or closer to home. We felt the effect in the last quarter of 2008 and continued through to 2009.

The trend is clear from our 2009 holiday arrivals figure, where we have recorded a negative growth of 12 percent. Most destinations around the Globe also experienced the downward trend in 2009, and according to the World Tourism Organization, global tourism dropped by 4% in 2009. In fact, our economy was well protected from the global economic crisis, but because of the fact that travel and tourism relates directly to people's household income, meaning that people travel when they have the money so because of the financial crisis, living standards in their country became expensive, most people lost their jobs and they have to cut down on luxury expenses like (travel) to meet the necessities of everyday life.

PNG was also greatly affected by the plane crash in Kokoda which saw trekking numbers decrease dramatically by more than 30 percent. However, Papua New Guinea will be the first to pick up in 2010 because of the stable exchange rate of our kina combined with our planned tourism development, marketing and promotional efforts. Therefore, our short-term forecast for 2010 is to record a growth of 10-15% or 140,000 - 150,000 visitor arrivals and further increase the holiday arrivals by 15-20 percent.

*Continue .....*

In the next five years (2010-2015), international visitor arrivals will continue to grow at an average rate of 7% annually and by 2015 more than 200,000 visitors will have visited Papua New Guinea, spending an estimated revenue of some K3 billion into the economy. The growth will be supported strongly by the implementation of the TPA plans (including the master plan) and Air Niugini's plan to expand its flight services to other international and domestic destinations. Increased marketing activities by TPA and the development of new tourism products by the tourism industry players will also determine our predicted growth in visitor numbers into Papua New Guinea.

Please note that unforeseen events like natural disasters, political or economic crisis, non-implementation of plans, budget cuts and new development in the tourism industry during the forecast period are not taken into consideration in our forecast model and the forecast will be updated annually by monitoring these events through research.