



## VISITOR SURVEY REPORT-2009



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## **Table of Contents**

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<b>1.</b>	<b>Executive summary.....</b>	<b>1</b>
1.1	Purpose of Visit.....	1
1.2	Length of Stay in Papua New Guinea.....	1
1.3	Source of Information.....	2
1.4	Previous Visits.....	2
1.5	Destinations Visited.....	2
1.6	Tourism Expenditure.....	3
1.7	Tourism Activities.....	3
1.8	Tourist Opinion & Reactions.....	3
<b>2.</b>	<b>Background.....</b>	<b>4</b>
2.1	Introduction.....	4
2.2	Objective.....	4
2.3	Methodology & Definition.....	5
<b>3.</b>	<b>Visitor Profile.....</b>	<b>6</b>
3.1	Purpose of Visit.....	6
3.2	Age Groups.....	7
3.3	Previous Visits to PNG.....	8
3.4	Travel Companion.....	9
<b>4.</b>	<b>Travel Patterns and Motivations.....</b>	<b>10</b>
4.1	Trip Planning.....	10
4.2	Trip Motivations.....	11
4.3	Travel concerns.....	12
4.4	Tour Types & Ratings.....	14
4.5	Type & Rating of Accommodation.....	14
<b>5.</b>	<b>Travel Behaviour.....</b>	<b>15</b>
5.1	Source of information.....	15
5.2	Internet Usage.....	17
5.3	Places Visited.....	17
5.4	Activities & their Valuation.....	19
5.5	Occupation.....	21
<b>6.</b>	<b>Areas That Needs Improvement.....</b>	<b>22</b>
6.1	Crime/Security Issue.....	23
6.2	Rubbish/Littering Issue.....	23
6.3	Poor Customer Services.....	24
6.4	Price Issue.....	24
6.5	Infrastructure Issue.....	24
6.6	Poor facility Issue.....	25
6.7	Unemployment Issue.....	25
6.8	Corruption Issue.....	25
6.9	Flights Efficiency Issue.....	26
<b>7.</b>	<b>Tourism Performance.....</b>	<b>26</b>
7.1	Length of Stay.....	26
7.2	Tourism Expenditure.....	27
	<b>FINDINGS &amp; RECOMMENDATIIONS.....</b>	<b>29</b>
	<b>APENDIX.....</b>	<b>31</b>

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### VISITOR SURVEY REPORT-2009

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## Tables & Charts:

Table 1:	Visitors sample by Purpose of Visit & Country of Residence-----	6
Table 2:	Age Group by Market Area-----	7
Table 3:	Previous Visits to PNG BY Market Area-----	8
Table 4:	Previous Visits to PNG by Purpose of Visit-----	8
Table 5:	Travel Companion by Source Market-----	9
Table 6:	Travel Companion by Purpose of Visit-----	9
Table 7:	Travel Arrangement by Market Area-----	10
Table 8:	Visitors' Interest by Source Market-----	11
Table 9:	Tour Services Preferred & their Ratings-----	13
Table 10:	Type of Accommodation Preferred & their Ratings -----	14
Table 11:	Source of Information by Market Area-----	15
Table 12:	Source of Information by Age Group-----	16
Table 13:	Provincial Travel Distribution by Market Area-----	18
Table 14:	Provincial Travel Distribution by Purpose of Visit-----	18
Table 15:	Ratings of Activities & Visitors' Participation-----	19
Table 16:	Activities by Market Area-----	20
Table 17:	Activities Undertaken by Purpose of Visit-----	21
Table 18:	Occupation & Market Area-----	21
Table 19:	Areas that Needs Improvement-----	22
Table 20:	Total Tourist Expenditure by Market Area-----	27
Table 21:	Average per Head & Daily Expenditure by Purpose of Visit-----	28
Figure 1:	Purpose of Visit in 2009 (%) -----	6
Figure 2:	Age by Activity Undertaken-----	7
Figure 3:	Travel Arrangement by Visitors-----	10
Figure 4:	Visitors' Interest by Source Market-----	12
Figure 5:	Factors that Need Improvement-----	12
Figure 6:	Accommodation Types & Ratings-----	14
Figure 7:	Source of Information by Age (%) -----	16
Figure 8:	Annual Trend of Internet Usage (%) -----	17
Figure 9:	Destinations Visited in PNG-----	17
Figure 10:	Products Exploited by Visitors-----	19
Figure 11:	Activity by Source Market-----	20
Figure 12:	Occupation by Source Market-----	22

## 1 Executive Summary

A total of 1500 visitors were sampled and analyzed by measures of Purpose of Visit, Country of Residence, Age Groups, Duration of stay in the country and many other measures that were of relevance for the desired outcome of this report. The following information gauged from international travelers were the basis for compiling a report that will be representative and that accurately depicts the trend of the tourism performance of Papua New Guinea for the year end 2009.

### 1.1 *Purpose of Visits:*

- Larger portion (59%) of the respondents sampled in this Visitor Survey were genuine holiday travelers. 17% of the respondents sampled were in the country for business but they were very short-term business travelers. Majority of these business travelers can be categorized as business opportunists as they were looking for business opportunity in the country or were in the country for very short business assignments. 10.6% of the visitors were in the country to visit their family and friends. Others have visited Papua New Guinea to pursue their interest in education or as educationists, some were in the country to attend meeting or conferences, others have visited the country for church work and others came for sports, work; and for other reasons.
- Visitors from America, Japan, Australia, and European markets were strongly holiday oriented, while the majority of the visitors from New Zealand and Asia were more on business reasons.
- Responses from first-time visitors were desired for the 2009 visitor survey. As such, 65% of the respondents were first-time visitors. Almost 47% of these first-time visitors made PNG as a tourist destination. 27% of Australians were first time visitors followed by USA with 11% and 4% of visitors from UK were first time visitors.

### 1.2 *Length of Stay in Papua New Guinea:*

- The average length of stay (ALS) in 2009 was 14.8 days/nights.
- The average length of stay (ALS) of visitors from the long haul markets was slightly higher than 15 days.
- Japanese market average length of stay was 11.32 days/nights, while the UK and German markets was 20.16 and 20.33 days/nights.
- The average length of stay for Canadian, German, and UK visitors were the highest with 25, 20.3 and 20.1 days respectively. The highest average was 37.7 for the Oceania region but this is considered insignificant as it is natural for visitors within the Oceania region to stay longer in PNG while visiting family, friends, and relatives.

### **1.3 Source of Information:**

- Family/friends, internet, business, and other sources appeared to be the major sources of information for visitors to source information about Papua New Guinea. For 2009, other sources means that the visitors have known about Papua New Guinea all throughout their life either through geography class in school or have known about this country because it is their neighbor as in the case of most Australians.
- Airlines, Travel Shows and NGO were low impact sources of information for the visitors.
- The Internet, Lonely Planet, and magazines appeared to be the most used source of information amongst visitors from the long haul markets.

### **1.4 Previous Visits:**

- 65.2 percent of the respondents were first time visitors while 34.8 percent were repeat visitors.
- Majority of the visitors from America, Japan, Germany, and from UK were visiting Papua New Guinea for the first time, while many visitors from Australia and New Zealand have visited the country several times before.
- Most (46.9 percent) of the first time visitors to the country came for holiday/leisure reasons.
- More than 81.7% of the respondents from the European markets were first time visitors, who came mostly on holiday purposes.

### **1.5 Destinations Visited in PNG:**

- There was no proportionality in the distribution of visitors to the Provinces in 2009. Some regions had higher rate of visitation while others had very few visitors.
- The Provinces with higher visitation were NCD, Kokoda, Madang, East New Britain, West New Britain, Morobe Province, and Eastern Highlands Province. However this varied across the different market segments and purpose of visit.
- Holiday was the main purpose of the majority of those who traveled out to these main centers/destinations. Goroka had a high number of visitors from the USA but they visited as church workers or to visit their friends and relatives who are in Goroka.

## **1.6 Tourism Expenditure:**

- Total foreign earnings from tourism (genuine tourists) in 2009 amounted to K391 million or US\$145 million compared to the K300 million in 2007. Forecasted tourism earnings for 2008 was K380 million.
- The overall average expenditure per visitor in Papua New Guinea was estimated at K14 326 or US\$5 338.4. The average daily expenditure per visitor was K967.97 or US\$306.85.
- The highest spenders, in terms of daily expenditure per person per trip, were visitors from other European countries (K1, 357.71 or US\$501.67), the American visitors (K1088.17 or US\$402.08), and visitors from other countries (K1078.95 or US\$398.7). The Other countries category is made up especially by visitors from Israel, Egypt, India; and some of the Arabian countries and some South American countries.
- The level of expenditure by holiday tourists was highest in terms of average per person (K14, 447 or US\$5338).
- On average, only 8% of the visitor expenditure was incurred on meals and drinks. The highest spending on average was incurred on accommodation, tours and airfares in PNG.

## **1.7 Tourism Activities Engaged By Visitors:**

- The majority of the Holiday visitors came to Papua New Guinea to enjoy and participate in the tourism products and activities that are abundant both on land and underwater. They also came to experience and enjoy the diverse cultures of PNG.
- Trekking and Diving/snorkeling had the highest preference among most of the visitors. A larger proportion of the visitors were interested by the forests and wildlife of PNG, the culture, the war relics and history; and most came here just for relaxation or rejuvenation. More than half of the Australian tourists came here for trekking.
- Many visitors who came for business had a lot of compliments for PNG and said that they will surely come back as tourists having seen the great abundance of tourism products this country has to offer.

## **1.8 Opinions and Reactions:**

- The Law and Order problem in PNG was highlighted throughout by the different markets and market segments but this did not hinder them from traveling within the country. After the experience, most said that security/crime was not really a major concern.
- Major factors mentioned to be discouraging travelers were poor customer services, rubbishes everywhere, and the ever rising costs of goods and services in the country.
- Airfare costs in PNG, high accommodation costs and the general high costs of goods and services provided in Papua New Guinea are major deterrents to the favorable influx of genuine tourist travelers to PNG.

- Cultural diversity and friendliness of the people received very high favorable response. The natural state of the attractions that are in the country, spectacular landscape and diving also had higher preference among the respondents.

## 2. Background

### **2.1 Introduction:**

This report covers the result of the seventh round of visitor survey conducted in Papua New Guinea from March to December 2009. The survey was conducted bi-monthly for almost a year unlike other previous surveys where they were conducted for four to five months so as to get a better representative data that will determine an accurate representation of the tourism performance of this country. The first visitor survey was conducted in 1996 and until then it is carried out on an annual basis.

The ongoing visitor survey project is an important component of the country's Tourism Research Information collection Program. From the results, the industry can then adjust its practices to hone its competitive edge. The survey project is coordinated by the Marketing & Research Division of the Papua New Guinea Tourism Promotion Authority.

### **2.2 Objectives:**

Tourism is indeed an important contributor to the economy of Papua New Guinea, and with its cultural and natural diversity, it has the potential to expand. Therefore, the use of up-to-date, reliable and comprehensive data is imperative for the successful assessment of the tourism performance of this country for a period of time. The data collected can be very useful for strategic planning by government entities concerned with tourism in PNG, the tourism industry players and other stakeholders.

In addition to the traditional statistics based on tourist arrivals, more data is required in measuring both the quality and quantity, as well as real and perceived structures of the product offered. Systematically conducted visitor surveys are among those tools which become more important.

The aims of this Visitor Survey were to:

- profile the existing trends of visitors by the different markets and market segments;
- assess the travel behavior patterns;
- identify positive assets as well as constraints of the tourism products;
- identify sources of information about PNG amongst the visitors;
- measure the average length of stay by the different markets;
- measure visitor expenditure on the services and products offered which in turn accounts for the quantified foreign exchange earnings from tourism;
- rate the services offered in PNG based on the visitors experience;



- measure the distribution of tourists to the different areas in PNG;
- investigate tourism activities undertaken by visitors and;
- gauge opinions, reactions and general comments about PNG as a tourist destination.

### **2.3 Methodology & Definitions:**

The survey was carried out at the Jacksons International Airport departure lounge. The face to face interview method was engaged. University students and other experienced Market Research interviewers were selected. They were trained before carrying out the survey.

The response rate has been good throughout. In order to achieve representative results, all filled questionnaires were validated and a sample representing all market areas and purpose of visit were selected for the survey period for data entry and analysis.

Data entry, analysis of results and final report was done in-house by the TPA Research and Statistics Division.

*Note: A reasonable number of respondents in this Survey were genuine holidaymakers (tourists). It was TPA's intention to target the holiday visitors to identify positive assets and constraints of Papua New Guinea's tourism products and services from a real tourist perspective.*

#### **Definitions:**

**Visitor-** 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 a period not exceeding 12 months and whose main "purpose of visit" is other than the exercise of an activity remunerated from within the country or place visited.

**Tourist -** A visitor whose visit is for at least one night and not more than 12 Months, and whose main "purpose of visit" may be under one of the following three groups

- (a) *leisure and holidays*
- (b) *business and professional*
- (c) *other tourism purposes*

**VFR -** Refers to those who travel to a destination with the main aim of Visiting Friends & Relatives.

**Arrival -** All data refer to arrivals and not to actual number of people travelling. One person visiting the same country several times during the year is counted each time as a new arrival.

**ALS -** Refers to the "Average Length of Stay"

**Respondents –** Is the total number of visitors sampled in this survey.

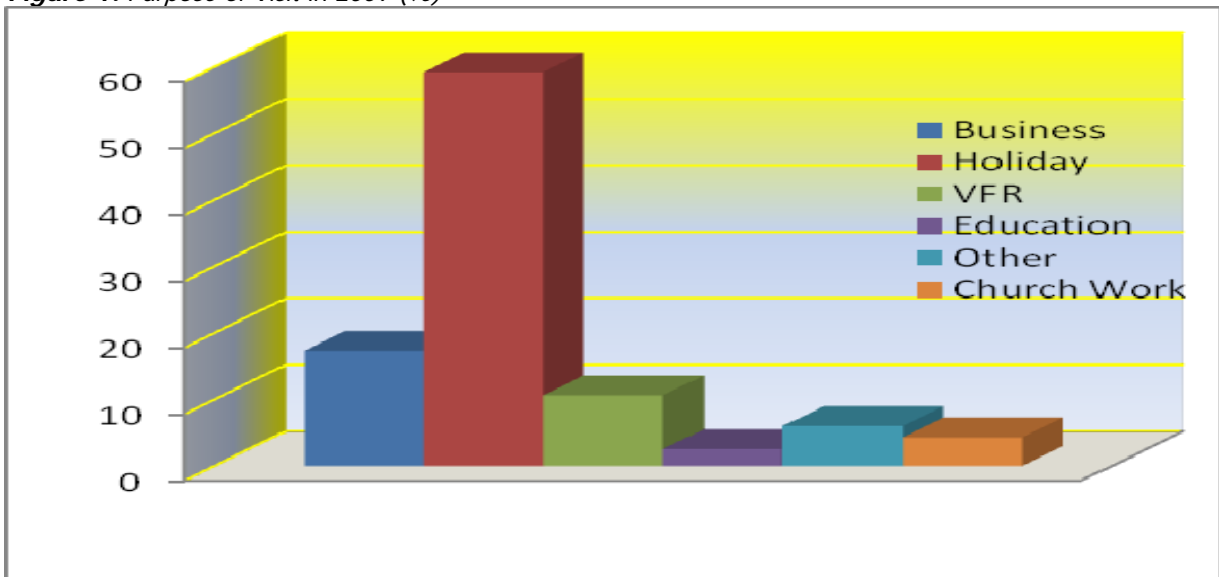


### 3 Visitor Profile:

#### 3.1 Purpose of Visit:

The intent of this survey was to gauge as much views from genuine holiday travelers. As such, 59.2 percent of the 1500 sampled respondents were holiday tourists. Those that came for business accounted for 17.3 percent of the total. 10.6 percent of the respondents came to PNG to visit their friends, families or relatives. 4.26 percent of the respondents said that they came for church work and the remaining 9 percent came for meetings or conferences, education or for research purpose, sports, work, and other reasons.

Figure 1: Purpose of Visit in 2009 (%)



Visitors from Germany, other European countries, Japan, USA and the UK were strongly holiday or leisure oriented. The main interest for visitors from the Asian markets and New Zealand were centered on business. The proportion of visitors who came to visit Friends and Relatives were high among visitors from the Asian market, the USA and Australia. The Australian market had a higher share of the visitors for holiday.

Table 1. Visitors Sample by Purpose of Visit and Country of Residence

Country	Business	Holidays	Church work	Education	VFR	Other	Total
Australia	99	465	15	12	57	35	683
Germany	4	51	1	2	1	2	61
France	2	26	0	0	2	0	30
Other Europe	10	103	0	3	3	8	127
USA	27	120	34	3	40	10	234
Canada	5	19	8	2	9	4	47
Africa	4	0	0	0	3	4	11
Other Countries	2	14	0	0	1	0	17
NZL	18	12	4	2	8	8	52
Oceania	1	1	0	2	3	3	10
China	11	3	0	0	1	2	17
Japan	7	23	0	0	1	0	31
Singapore	5	3	0	0	3	2	13
Philippines	9	3	2	0	0	1	15
Asia	39	4	0	2	17	7	69
UK	17	41	0	10	10	5	83
<b>Total Respondents</b>	<b>260</b>	<b>888</b>	<b>64</b>	<b>38</b>	<b>159</b>	<b>91</b>	<b>1500</b>

### 3.2 Age Group:

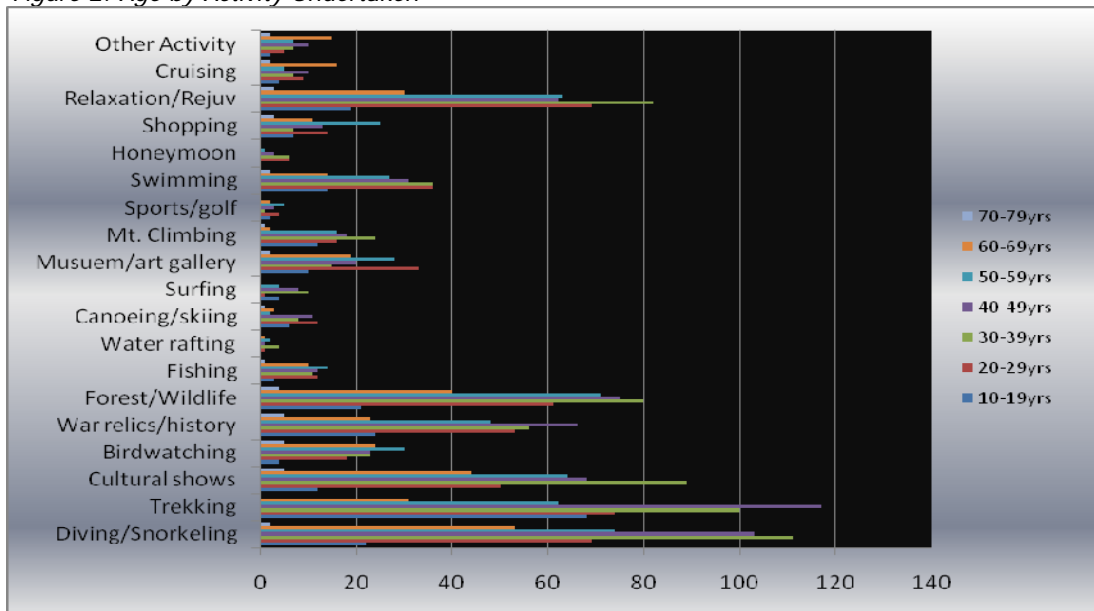
More than 24 percent of all the respondents were between the age group of 40-49 years. 43 percent of the respondents were of the age group of 39 and below while 33 percent were 50 years and above. Only 0.13 percent of the total respondents were 80 years and above.

Table 2. Age Group by Market Area

Age Group	Aust.	Germ	Frnce	Other Euro	USA	Can	NZL	Jpn	UK	Other Asia	China	Other Country	Total
10-19yrs	65	0	0	2	10	12	2	0	5	6	0	0	102
20-29yrs	97	9	3	21	31	9	8	3	18	14	0	14	227
30-39yrs	150	16	15	31	40	8	12	10	22	14	6	14	338
40-49yrs	176	14	11	33	41	13	6	10	22	16	5	23	370
50-59yrs	131	14	1	24	46	4	17	8	15	17	4	10	291
60-69yrs	55	8	0	15	56	1	7	0	1	2	2	5	152
70-79yrs	8	0	0	1	9	0	0	0	0	0	0	0	18
80-89yrs	1	0	0	0	1	0	0	0	0	0	0	0	2
<b>Total</b>	<b>683</b>	<b>61</b>	<b>30</b>	<b>127</b>	<b>234</b>	<b>47</b>	<b>52</b>	<b>31</b>	<b>83</b>	<b>69</b>	<b>17</b>	<b>66</b>	<b>1500</b>

The middle age (30-50 years) visitors took part in almost all the activities. 37.7 percent of the older age (50-70 years) said that they took their time in enjoying some of the cultural activities that were on show in the country, were fascinated by the country's wildlife and forest; and they enjoyed the marine life through diving and snorkeling. Younger age group (30 and below) participated equally in all the activities. However, the middle age group (30-50 years) came purposely for diving and trekking. The older age group visitors were more interested in bird-watching, visiting war sites and relics and most of them visited the country simply for relaxation purposes.

Figure 2: Age by Activity Undertaken



### 3.3 Previous Visits to PNG

Despite the fact that repeat travel often bears a positive relationship to knowledge of the market and the level of satisfaction, it was also assumed that those who work in the country or on business would frequent the country too often. This is why the trend to sample more repeat visitors was altered and thus, more first time visitors were sampled.

A high proportion of visitors from Australia, New Zealand and Asia were repeat visitors. A relatively high share (32%) of American visitors had frequented the country before and a good 50% of the Asian respondents have regularly visited PNG. Most of the visitors from Germany (77%), USA (68%) and Japan (93%) were newcomers to PNG.

*Table 3: Previous Visits to PNG by Market Area*

Market Area	Previous Visits				Total	Total %
	Yes		No			
	No.	%	No.	%		
Australia	274	40	409	60	683	100
New Zealand	29	56	23	44	52	100
Pacific Islands	6	60	4	40	10	100
Japan	2	7	29	93	31	100
Other Asia	62	54	52	46	114	100
United Kingdom	21	25	62	75	83	100
German	14	23	47	77	61	100
Other Europe	20	13	137	87	157	100
USA	74	32	160	68	234	100
Other Countries	5	18	23	82	28	100
Canada	15	32	32	68	47	100
<b>Total</b>	<b>522</b>	<b>35</b>	<b>978</b>	<b>65</b>	<b>1500</b>	<b>100</b>

*The above result was somewhat expected because data collection was controlled whereby first-time and very short-term travelers were targeted. This was done to obtain very reliable information from the perspective of a representative sample whose frequent visits to PNG will have no influence in their responses.*

Visitors who came for business (61%), church work (56%), and friends and relatives visitation (52%) have visited PNG before. The percentage comparisons are made within the figures for each specific purpose.

*Table 4. Previous Visits to Papua New Guinea by Purpose of Visit*

Purpose of Visit	Previous Visits – Survey Response				Total	Total %
	No		Yes			
	No.	%	No.	%		
Business	100	39	160	61	260	100
Holiday/Leisure	703	79	185	21	888	100
Visit Friends/ Relatives	76	48	83	52	159	100
Education	76	63	14	37	38	100
Church Work	28	44	36	56	64	100
Other	47	52	44	48	91	100
<b>Total</b>	<b>978</b>	<b>65</b>	<b>522</b>	<b>35</b>	<b>1500</b>	<b>100</b>

### 3.4 Travel Companion:

The visitors were asked who they were travelling with. 30.8 percent of the total respondents were travelling with their friends or with family. Markets including Canada (57%), Germany (39%) and USA (38%) had higher proportion of visitors travelling with friends or families.

More than 48 percent of the visitors from Japan were traveling together on group tour and 22 percent with family or friends. The German and Other European markets showed a significant share (75% & 73%) of visitors travelling with companion either on group tour or with family and spouse.

Table 5. Travel Companions by Market Area

Market Area	Travel Companion					Total
	Alone	With Spouse	With Family	Group Tour	Buss. Partner	
Australia	174	92	187	199	31	683
New Zealand	29	5	9	2	7	52
Pacific Islands	8	0	1	1	0	10
Japan	6	1	7	15	2	31
Asia	69	2	25	2	16	114
United Kingdom	39	5	35	1	3	83
German	15	13	24	9	0	61
Other Europe	38	34	53	29	3	157
USA	52	46	89	42	5	234
Other Countries	15	5	5	1	2	28
Canada	15	5	27	0	0	47
<b>Total</b>	<b>460</b>	<b>208</b>	<b>462</b>	<b>301</b>	<b>69</b>	<b>1500</b>

Majority (64%) of the visitors on business were individual travelers, while most (85%) of the holiday visitors were traveling in groups with spouse, family and group tour.

The other purposes of visits including Education, work, meeting and conference had a high percentage of response for traveling alone.

Table 6: Travel Companion by Purpose of Visit

Purpose of Visit	Travel Companion					Total
	Traveling Alone	With Spouse	With Family	Group Tour	Buss. Partner	
Business	166	5	21	0	68	260
Holiday/Leisure	132	151	311	293	1	888
Visit Friends	74	28	57	0	0	159
Education	21	2	14	1	0	38
Church Work	13	15	33	3	0	64
Other	54	7	26	4	0	91
<b>Total</b>	<b>460</b>	<b>208</b>	<b>462</b>	<b>301</b>	<b>69</b>	<b>1500</b>

## 4. Travel Patterns & Motivations

### 4.1 Trip Planning:

To identify how the visitors planned their trip, the respondents were asked as to whether they have taken a pre-arranged trip or were arranged by themselves. 65% of the visitors stated that their trip was organized by themselves which means that those on holiday had to plan their trip itinerary upon arrival in the country. 35% of the visitors travelled to PNG on a pre-arranged trip. All or most of those on pre-arranged trip were holiday travelers and a good number of those visitors who arranged their own trip were also holiday travelers. Only 6% of the respondents said that their trip to the country was planned by their company or by the organization they are attached to.

Holidaying visitors from the USA, UK and Europe (74%, 84%, and 55% respectively) preferred to arrange their trip themselves. This was attributed to some reasons and one popular reason was that they want to discover the adventures in the country by planning their itinerary within the country by what tourism product or activity they desire most.

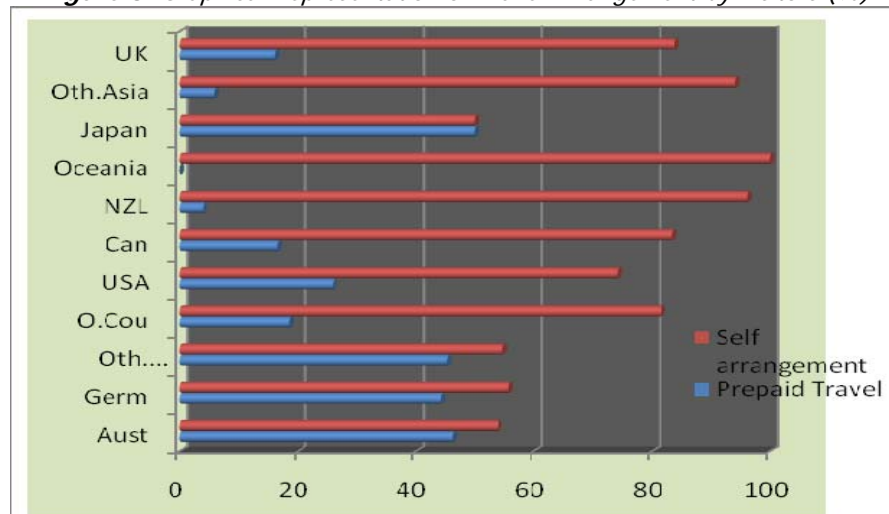
Some said that they could not find adequate information on the internet to properly plan their trip so the only proper thing to do would be to plan their itinerary within the country on arrival. Most Australians (46%) bought a pre-paid package because the country has numerous tour companies available which operate the Kokoda track.

The table below indicates that 89 of the respondents did not mention as to whether they have bought a prepaid package or have arranged their trip to the country by themselves.

Table 7: Travel Arrangement & Market Area

Travel Arrangement	Market Area											Total
	Aust	Germ	Oth. Europ	Oth. Coun	USA	Can	NZL	Oceania	Japan	Oth.Asia	UK	
Prepaid Travel	297	27	68	5	56	7	2	0	15	6	12	495
Self arrangement	346	34	82	22	160	35	49	10	15	101	62	916
<b>Total</b>	<b>643</b>	<b>61</b>	<b>150</b>	<b>27</b>	<b>216</b>	<b>42</b>	<b>51</b>	<b>10</b>	<b>30</b>	<b>107</b>	<b>74</b>	<b>1411</b>

Figure 3: Graphical Representation of Travel Arrangement by Visitors (%)



## 4.2 Trip Motivation

Culture (36%) was the most influential factor that marveled the international visitors followed by Friendly People (31%). Another 36% of the respondents were motivated by the natural and undisturbed state of the tourism products and by the great wildlife that is abundant in the country. These respondents have agreed that there is huge potential in eco-tourism in PNG.

The landscape of the country with its noted rugged terrain and beautiful plains and valleys was also a factor worth mentioning by a fair (21%) of the respondents. 14% of the visitors noted that PNG has a lot to offer when it comes to diving and snorkeling. Some (10%) embraced that PNG is generally beautiful country to explore and visit while the rest were interested in other areas like fishing, climate, diversity of languages, and others.

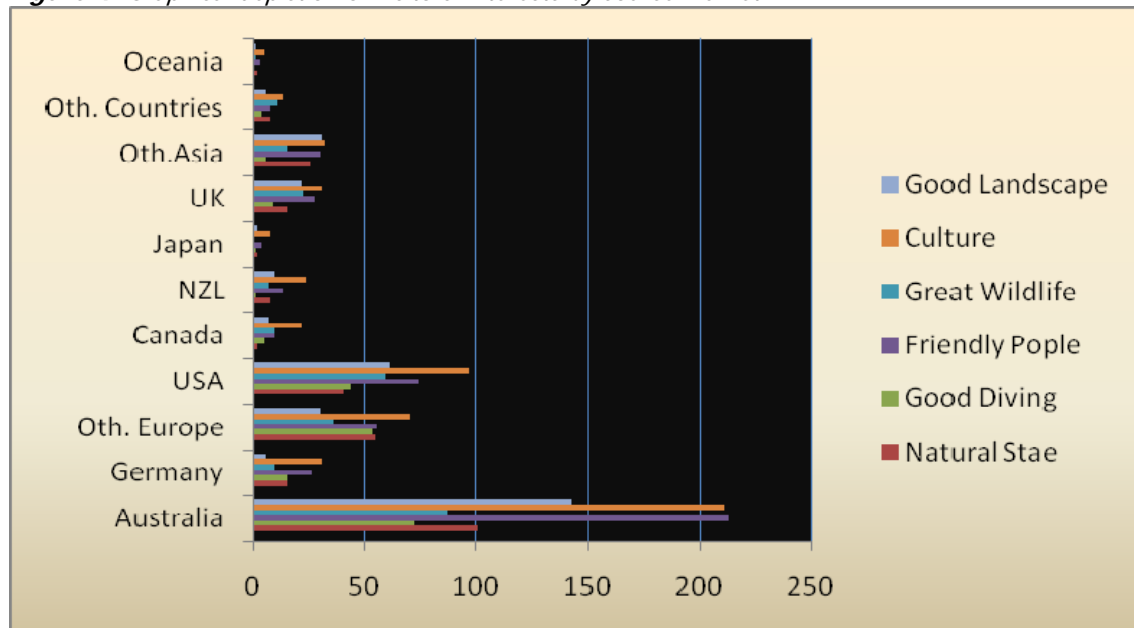
Approximately 50 percent of the Australians responded favorably to culture, trekking, friendliness of the people, war relics and the war history of the country. Most (37%) of the respondents from the European markets were interested in diving. 26% said that they were content with the natural wildlife with which this country is rich in. A great number (71%) of the USA respondents were influenced by diving, the wildlife, and landscape of PNG.

On the other hand, Japanese respondents (63%) said that they interested in the war relics, culture, and the general beauty of the country. Least response for those motivated by business opportunity in the country was sampled due to the fact that only genuine holiday travelers were targeted. However, 67% of the respondents for the business opportunity as a motivational factor were from Australia and New Zealand.

Table 8: Visitors' Interest by Source Market

Visitor Interest	Market Area																Total
	Aust	Germ	France	O.euro	USA	Can	Africa	O.Cou	NZL	Ocean	China	Japan	Sing	Phil	Asia	UK	
Culture	211	31	15	55	97	22	2	12	24	5	3	8	3	6	20	31	545
History/War Relics	118	13	0	5	3	2	0	3	5	0	2	6	0	0	4	6	167
Natural State	101	16	8	47	41	2	5	3	8	2	4	2	6	3	13	16	277
Great Wildlife	87	10	13	23	60	10	4	7	7	1	4	0	3	2	7	23	261
Nice Trekking	112	1	0	1	1	2	0	0	0	0	2	0	0	0	0	2	121
Good Landscape	143	6	13	17	62	7	3	3	10	1	4	2	4	1	22	22	320
Friendly People	213	27	12	44	74	10	5	3	14	3	8	4	1	5	16	28	467
Rainforest	52	8	0	12	18	2	3	5	2	0	4	0	2	2	8	10	128
Beautiful Flora	40	0	4	7	7	5	3	3	0	0	2	0	1	0	1	3	76
Countryside/Villages	55	5	0	6	14	4	0	2	0	0	1	3	0	0	0	4	94
Cool Climate	12	0	2	14	14	7	0	0	1	0	6	0	2	0	4	7	69
Language Diversity	8	7	0	4	6	12	0	1	0	1	2	0	0	0	0	10	51
Good Diving	72	16	5	49	44	5	0	4	1	0	2	1	0	2	2	9	212
Good Surfing	12	1	0	0	1	0	0	0	0	0	0	0	0	0	0	2	16
Good fishing	14	1	0	0	3	2	0	0	0	0	1	0	0	0	0	3	24
Great highlands	19	0	2	3	4	1	0	1	1	0	0	0	0	0	1	3	35
Coastal Beaches	24	3	3	6	6	2	0	0	1	0	0	0	0	0	0	2	47
Business Oportunities	15	0	0	1	2	2	0	0	3	0	4	0	1	1	3	0	32
Gteat Artwork	14	0	4	5	5	0	0	0	0	0	0	0	0	1	5	3	37
Beautiful Country	70	7	2	13	14	2	2	2	8	2	3	6	1	0	10	10	152
<b>Total Responses</b>	<b>1392</b>	<b>152</b>	<b>83</b>	<b>312</b>	<b>476</b>	<b>99</b>	<b>27</b>	<b>49</b>	<b>85</b>	<b>15</b>	<b>52</b>	<b>32</b>	<b>24</b>	<b>23</b>	<b>116</b>	<b>194</b>	<b>3131</b>
<b>Total Respondents</b>	<b>683</b>	<b>61</b>	<b>30</b>	<b>127</b>	<b>234</b>	<b>47</b>	<b>11</b>	<b>17</b>	<b>52</b>	<b>10</b>	<b>17</b>	<b>31</b>	<b>13</b>	<b>15</b>	<b>69</b>	<b>83</b>	<b>1500</b>

**Figure 4:** Graphical depiction of visitors' interests by source market.



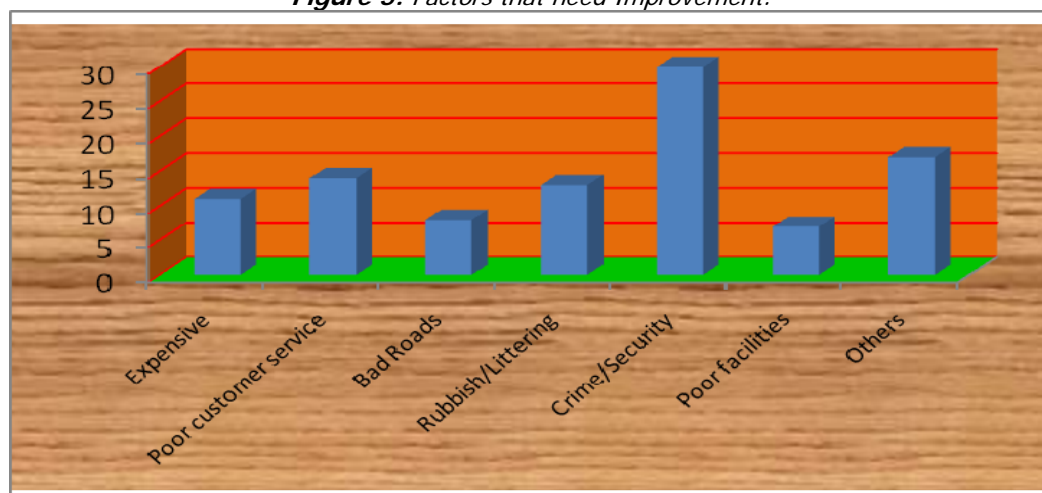
Note: Only the popular interests are depicted by the table above. To compare how other interests by source market fared, refer to Table: 8

### 4.3 Travel Concern:

There were areas that are of concern to the visitors and an overwhelming response was received for each of them. The outcome turned out that there are numerous areas that needs improvement or are disliked by the visitors. To encourage more visitors in the coming years and for a healthy tourism industry, these problems needs to be addressed vigorously and immediately.

Crime & security (30%) as usual still tops the list for the things that visitors detest or want improvement on. Poor customer service (14%) is also an area that needs to be improved for encouraging more visitors into the country. Another 13% of the respondents were convinced that not enough is done to keep the towns and cities free from rubbish and it is an eyesore for the visitors.

**Figure 5:** Factors that need Improvement.





A further 11% of the respondents were upset about the cost of every goods and services provided in the country. They said that accommodation and airfare cost in PNG are much higher than in other countries. An airfare surcharge of one trip in the country could buy them two trips elsewhere. A fair number (7%) of the respondents claim that the tourism facilities in the country are very poor. This implies that the abundance of tourism products are not easily accessible and their potential is neglected.

Poor infrastructure, including poor road condition in the country was also an area of concern. 8 % of the travelers indicated that better roads are a necessity for easier access to the desired destinations and for comfort. The other 25 % of the travelers thought that other deterring factors like government corruption, flight delays, high unemployment, and others should be addressed for creating a more conducive state in order for more visitors to come into the country.

#### 4.4 Tour Types Taken:

Visitors were asked to indicate the tour company from which they bought their tour package and rate its services accordingly. The ratings were excellent, fair, and poor. Only 36 percent of the total visitors sampled responded to this part of the questionnaire. This was because not most of the visitors bought a tour package or even if they had, then they bought it from a tour company in their own country. These clearly show s that our local tour companies needs to be marketed abroad and be made known to interested visitors to PNG.

Some of the tour services that were popular to the sampled respondents are; Trans Niugini Tours, Kokoda Trail Adventure, PNG Pacific tours, No Roads Expedition, and other tours. Other tours would mean that they have bought their package from a tour company or travel agent based in their own country. Almost all (90%) of the respondents to this part of the questionnaire rated the tour operators and the services they provide as very excellent.

Table 9: Tour services preferred and their ratings

Tour Services	Ratings			Total
	Excellent	Poor	Fair	
Paivu Tours	0	1	0	1
MTS	1	0	0	1
Trans Niugini Tours	41	0	0	41
Tufi Resort	1	0	0	1
Ecotourism Melanesia	4	0	0	4
Kokoda Trekking	9	3	1	13
Kokoda Spirit	47	0	0	47
PNG Trekking Adventure	6	0	0	6
Walindi Plantation Resort	7	1	0	8
Kokoda Trail Adventure	21	1	0	22
PNG Pacific Tours	17	6	0	23
Niugini Holidays	5	2	0	7
PNG Japan Limited	9	0	0	9
No Roads Tours	45	5	0	50
Pergerine Tours	12	3	0	15
Other Tours	265	30	2	297
<b>Total</b>	<b>490</b>	<b>52</b>	<b>3</b>	<b>545</b>

Most of the tours taken were for trekking the Kokoda trail. This signifies that visitors that visited other parts of the country for other purposes have not indicated from which tour operator or tour services they have taken their trip. This would either mean that less is known about the tour services that are being provided in the country or they have opted to arrange their entire travel itinerary themselves. If the former is true, it calls for a strategic and effective means to market these tour services overseas.

#### 4.5 Type & Ratings of Accommodation Used:

Visitors were asked to indicate the type of accommodation they used and to rate them accordingly. The table below shows the outcome:

Table 10: Type of Accommodation Preferred and Their Ratings.

Rating	Type of Accommodation						Total
	Hotel	Resort	Lodge	Guest House	Apartment	Other Accommodation	
Excellent	236	186	73	93	28	117	<b>733</b>
Fair	402	97	75	55	6	39	<b>674</b>
Poor	70	13	10	19	1	4	<b>117</b>
<b>Total</b>	<b>708</b>	<b>296</b>	<b>158</b>	<b>167</b>	<b>35</b>	<b>160</b>	<b>1524</b>

The choices of accommodation were from hotel, resort, lodge, guesthouse, apartment, and other accommodation. Other accommodation would include private homes of friends or relatives, camps, rest houses in villages, accommodation on cruise ships and others. It is interesting to note that most holiday travelers from the European markets were cost conscious and therefore preferred lodges, inns, and cheaper guest houses from the hotels.

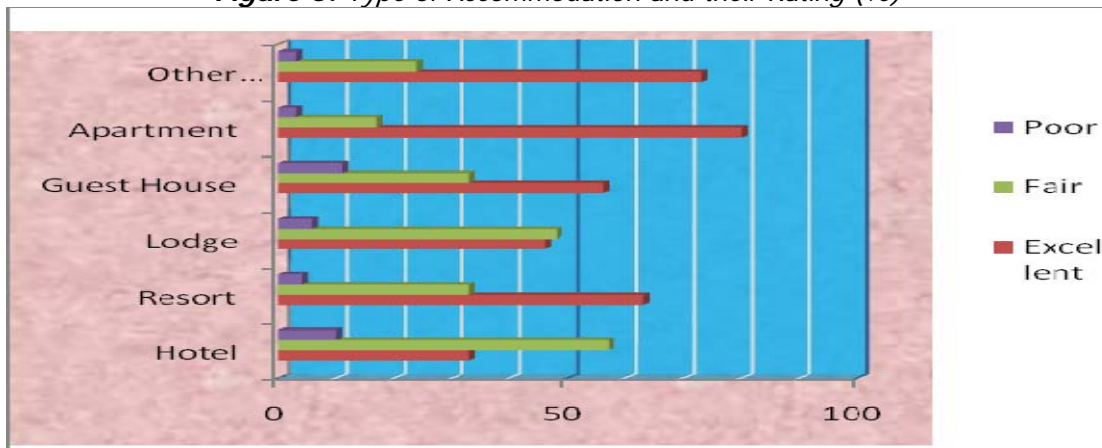
Resorts, lodges, and guest houses were preferred by bulk of the holiday travelers while hotels were preferred by most business travelers. This is exceptional for the Australians who came for trekking because they chose hotels from other accommodation during their stay in Port Moresby.

Majority (57%) of the respondents who chose hotel as their preferred accommodation rated it as fair. They said facilities and services were not to their choice and not worth the large amount of money they spent. 33 percent of the respondents think that hotel accommodation is excellent and 10 percent rated it as poor.

An overwhelming response was received for the excellent rating from those who used resorts and guest houses (63% & 56% respectively), and 33% of the respondents rated both type of accommodation as fair. It seems that most of the lodges in the country are not to the liking of the international visitors as more (48%) of them rated it as fair and 46% thought that they were excellent.

When it came to apartment and other accommodation, visitors thought that they were to their expectation and their rating is much higher compared to the other accommodation (80% & 73% respectively).

Figure 6: Type of Accommodation and their Rating (%)



## 5. Travel Behavior

### 5.1 Source of Information:

Visitors' sources of information influence the decision to choose a holiday destination and create expectations of the destination country. Various sources build more awareness and it enables visitors to perceive the destination based on the sources.

More than 24 percent and 15 percent sourced information on PNG from relatives and friends and through internet. There is no most preferred source of information that clearly stands out. All the visitors have decided to visit the country and have come to know the country through various sources. 10 percent of the visitors have come to know PNG through business and a further 8 percent of the visitors' source of information was through other sources.

Other sources response was mostly provided by Australians and New Zealanders which indicate that they have known the country all throughout their life as PNG is their neighbor, with its close political and business ties. It can be conceded that most visitors do not take the initiative to visit PNG by themselves but are being urged by other people. Lonely planet and internet were the source of information for a notable portion of visitors from long-haul markets.

Table 11: Source of Information by Market Area

Source of Info	Market Area											Total
	Aust	Germ	Oth.	Euro	USA	Can	Oth.	Cour	NZL	Ocean	Japan	
PNG Website	60	4	16	19	2	2	1	0	0	4	4	112
Family/Friends	361	16	37	110	17	11	20	7	12	36	31	658
Travel Agent	66	8	38	31	1	2	1	0	22	2	0	171
Travel books	48	23	12	42	5	3	3	0	2	16	7	161
Electronic Media	44	3	28	15	4	4	3	1	0	17	8	127
Print Media	34	9	17	10	2	0	2	0	0	6	4	84
Airlines	8	0	0	0	0	0	0	0	0	0	0	8
Travel Shows/Fairs	8	1	1	6	0	0	0	0	0	0	0	16
Magazines	57	6	55	33	2	3	0	0	9	17	6	188
Business	92	3	18	34	7	7	20	1	6	14	72	274
Internet	127	31	97	72	8	9	6	0	5	36	23	414
Lonely Planet	38	17	62	37	7	7	1	0	2	21	2	194
Overseas TPA Office	8	0	0	3	0	0	0	0	0	0	0	11
Past Resident	17	1	0	1	0	0	0	0	0	0	2	21
NGO	1	0	0	1	5	0	0	0	0	0	0	7
Church Contacts	5	4	1	34	8	0	4	0	0	0	2	58
Other Sources	148	14	9	22	8	0	13	1	0	12	4	231
<b>Total Responses</b>	<b>1122</b>	<b>140</b>	<b>391</b>	<b>470</b>	<b>76</b>	<b>48</b>	<b>74</b>	<b>10</b>	<b>58</b>	<b>181</b>	<b>165</b>	<b>2735</b>
<b>Total Respondents</b>	<b>683</b>	<b>61</b>	<b>157</b>	<b>234</b>	<b>47</b>	<b>28</b>	<b>52</b>	<b>10</b>	<b>31</b>	<b>83</b>	<b>114</b>	<b>1500</b>

Note: This was a multiple response question, where one respondent had more than one information source.

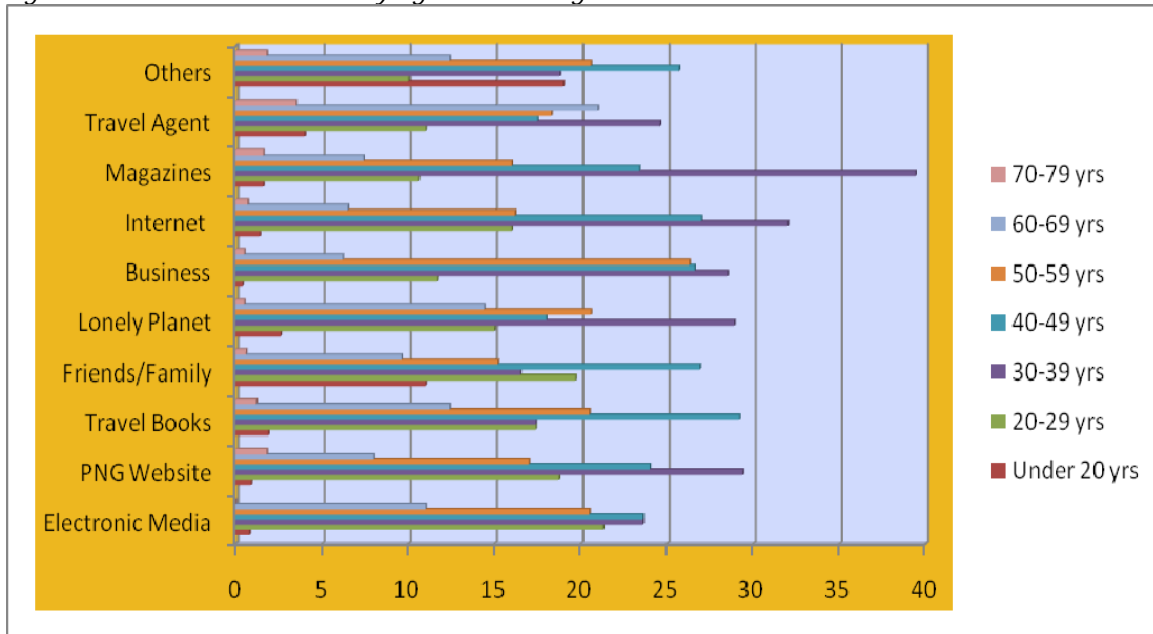
An analysis was done to find out the source of information about Papua New Guinea reaching different age group. The results show that younger (20-29 yrs) and (40-49 yrs) are depending very much on information relayed from relatives and friends while majority of the age group of 30-39 yrs depend largely on the information from the internet. Much of the teenagers who visited the country came to know the country through their friends and relatives.

Table 12: Source of Information by Age Group

Source of Info	Age of Visitors								Total
	10-19yrs	20-29yrs	30-39yrs	40-49yrs	50-59yrs	60-69yrs	70-79yrs	80-89yrs	
PNG Website	1	21	33	27	19	9	2	0	112
Family/Friends	75	130	109	177	100	63	4	0	658
Travel Agent	7	19	42	30	31	36	6	0	171
Travel books	3	28	28	47	33	20	2	0	161
Electronic Media	1	26	30	30	26	14	0	0	127
Print Media	1	11	27	27	10	8	0	0	84
Airlines	0	1	1	2	3	1	0	0	8
Travel Shows/Fairs	0	2	4	6	3	1	0	0	16
Magazines	3	20	74	44	30	14	3	0	188
Business	1	32	78	73	72	17	1	0	274
Internet	6	66	133	112	67	27	3	0	414
Lonely Planet	5	29	56	35	40	28	1	0	194
Overseas TPA Office	0	0	4	4	0	3	0	0	11
Past Resident	2	2	0	6	4	3	3	1	21
NGO	2	1	0	2	0	2	0	0	7
Church Contacts	8	3	3	16	15	10	3	0	58
Other Sources	32	25	43	49	55	26	1	0	231
<b>Total Responses</b>	<b>147</b>	<b>416</b>	<b>665</b>	<b>687</b>	<b>508</b>	<b>282</b>	<b>29</b>	<b>1</b>	<b>2735</b>
<b>Total Respondents</b>	<b>102</b>	<b>227</b>	<b>340</b>	<b>369</b>	<b>289</b>	<b>153</b>	<b>18</b>	<b>2</b>	<b>1500</b>

Note: This was a multiple response question.

Figure 7: Source of Information by Age in Percentage

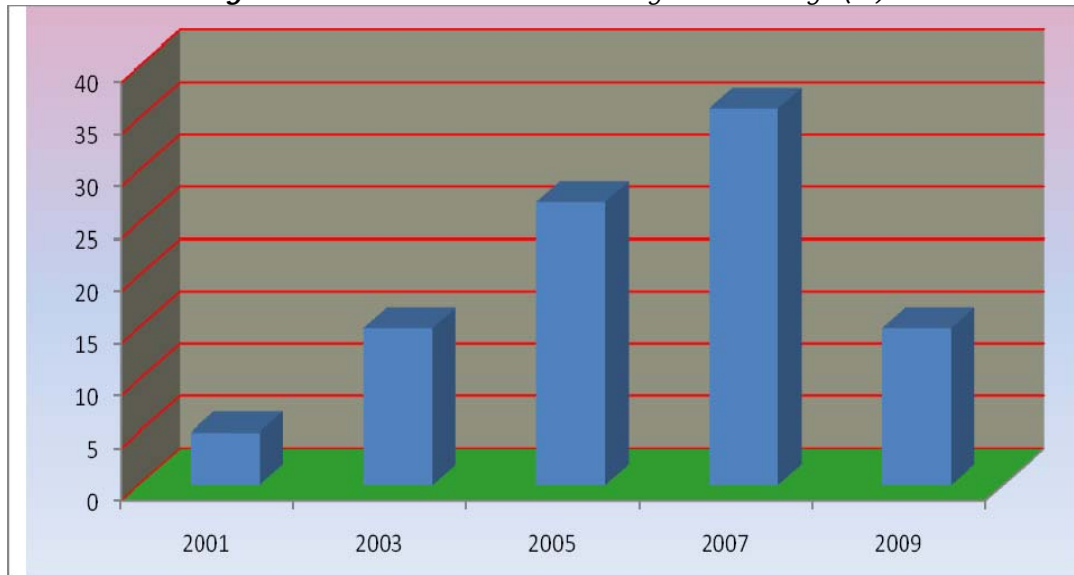


Note: Comparison was made for each age with its respective total and not with the total respondents.

### 5.2 Internet Usage

More than 15 percent of the visitors in the year 2009 survey responded to have used Internet as their source of information. This is the second most favored source of information apart from information attained through friends or relatives. The usage of internet as a source of information as fared well throughout the years except in 2009. Internet users were among Australians (31%), America (17%), and Other Europe (18%) respectively.

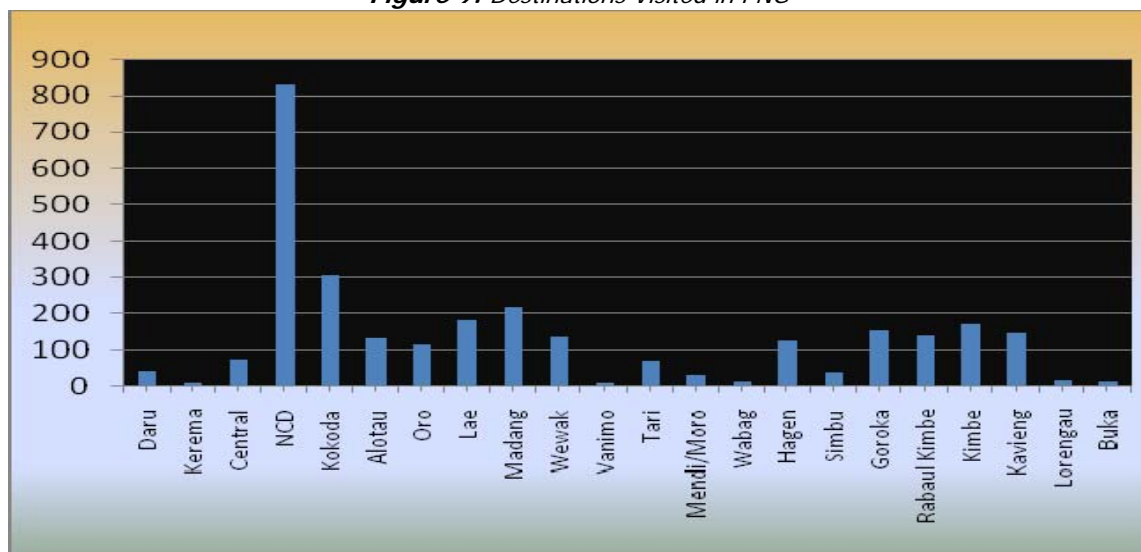
**Figure 8: Annual Trend of Internet Usage in Percentage (%)**



### 5.3 Places Visited:

Most of the international arrivals in PNG are through Port Moresby because it has the only airport by which international visitors make their entry into the country. From Port Moresby, visitors make their way to other Provinces of their choice and distributions of visitors among the provinces vary according to different market segments and purpose of visit.

**Figure 9: Destinations Visited in PNG**



Kokoda was the most frequented place visited in 2009 by international visitors and it was especially done by Australians. The Provinces with higher visitation were Madang, Morobe, Eastern Highlands, West New Britain, and New Ireland Province.

Holiday/Leisure was the main purpose of the majority of those who traveled out to the provinces. Holiday Visitors who visited Kokoda/ accounts for 99% and more than 86% of those who visited West New Britain were genuine holiday visitors.

**Table 13: Provincial Travel Distribution by Market Area**

Provinces	Aust	Germ	Oth. Europe	USA	Can	Oth. Count	NZL	Ocea	Jap	Oth. Asia	UK	Total
Daru	7	0	1	12	2	3	1	0	0	10	6	42
Kerema	4	0	0	2	2	1	1	0	0	0	0	10
Central	38	0	5	16	3	0	0	2	0	6	4	74
NCD	402	25	65	99	27	13	35	7	20	85	49	827
Kokoda	294	0	1	0	0	0	2	0	0	3	5	305
Alotau	48	9	29	31	1	0	1	0	0	4	11	134
Oro	45	8	21	27	0	0	1	0	0	5	6	113
Lae	75	28	5	16	1	4	5	4	0	35	10	183
Madang	67	27	45	35	3	11	4	1	2	11	14	220
Wewak	10	26	46	29	2	4	0	0	9	1	10	137
Vanimo	4	0	5	1	0	0	0	0	0	0	2	12
Tari	5	11	6	35	7	2	0	0	0	3	4	73
Mendi/Moro	6	0	6	7	3	0	2	0	0	2	5	31
Wabag	4	0	0	7	0	1	4	0	0	0	0	16
Hagen	23	9	11	42	7	5	6	0	2	11	8	124
Simbu	8	2	6	17	1	2	0	0	2	0	0	38
Goroka	20	12	15	74	12	4	2	0	1	7	8	155
Rabaul	44	14	39	21	3	0	0	2	8	5	5	141
Kimbe	24	17	61	28	8	1	1	1	14	5	11	171
Kavieng	51	17	42	18	4	3	2	1	0	2	7	147
Lorengau	5	0	10	0	0	1	0	0	0	0	3	19
Buka	3	1	1	0	0	0	4	0	0	2	3	14
<b>Total</b>	<b>1187</b>	<b>206</b>	<b>420</b>	<b>517</b>	<b>86</b>	<b>55</b>	<b>71</b>	<b>18</b>	<b>58</b>	<b>197</b>	<b>171</b>	<b>2986</b>

East New Britain Province had also had a good share of holiday visitors with 80% and more than 62% of the visitors who went to Madang were holiday travelers. Kerema, Wabag, and Buka were the provinces that had the least number of visitors. Visitors who visited Mendi and Moro did exclusively for business (77%). However, Tari had a high portion (75%) of holiday visitors.

**Table 14: Provincial Travel Distribution by Purpose of Visit**

Provinces	Business	Holiday	VFR	Education	Church Work	Other	Total
Daru	8	21	3	5	0	2	39
Kerema	1	5	0	1	2	1	10
Central	9	31	10	4	6	14	74
NCD	207	411	94	18	29	68	827
Kokoda	1	301	1	0	0	2	305
Alotau	5	111	10	5	2	1	134
Oro	6	98	1	4	4	0	113
Lae	60	72	25	9	6	11	183
Madang	15	138	42	6	6	13	220
Wewak	6	120	3	0	2	6	137
Vanimo	0	11	1	0	0	0	12
Tari	9	55	2	0	3	4	73
Mendi/Moro	24	2	0	0	2	3	31
Wabag	3	3	1	0	4	5	16
Hagen	22	70	9	1	8	14	124
Simbu	1	25	5	0	7	0	38
Goroka	10	66	42	4	25	8	155
Rabaul	11	113	8	4	4	1	141
Kimbe	7	148	9	5	2	0	171
Kavieng	8	126	9	0	2	2	147
Lorengau	1	17	1	0	0	0	19
Buka	3	4	4	0	2	1	14
<b>Total</b>	<b>417</b>	<b>1948</b>	<b>280</b>	<b>66</b>	<b>116</b>	<b>156</b>	<b>2983</b>

*Note: This was a multiple response question. One visitor has visited more than one place in a trip.*

More foreign settlers in Eastern Highlands, Madang, and Morobe provinces were indicated by a higher visitation of Visit Friends & Relatives visitor. There was also a high (16%) visitation to Eastern Highlands Province for church work especially by visitors from the United States of America.

#### 5.4 Activities Undertaken and their Valuation:

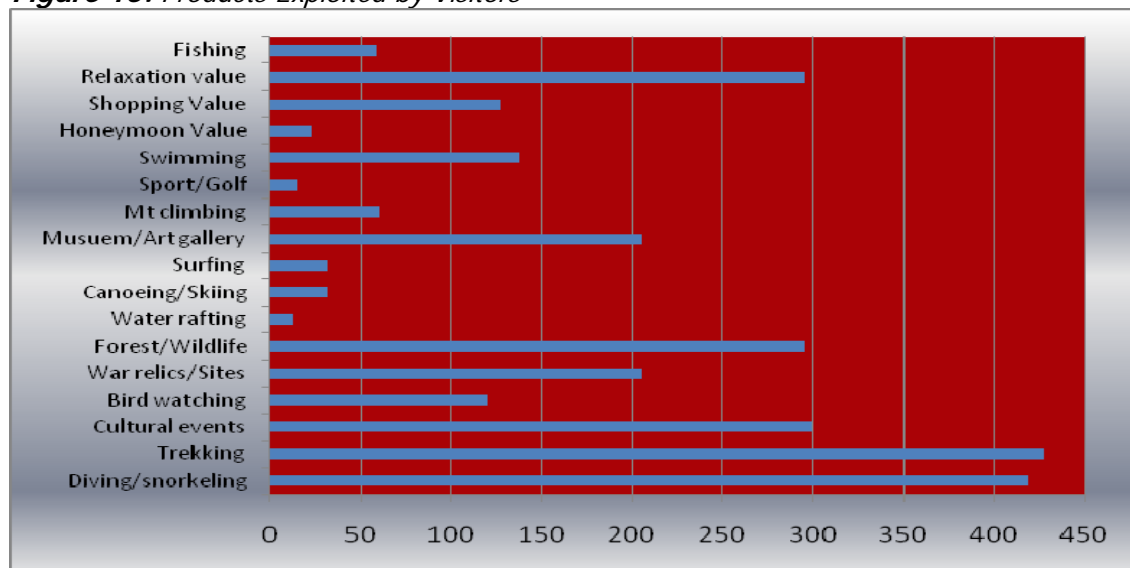
Table 15: Ratings of Activities and Visitors' Participation

Activity	No. of Visitors who took part	Ratings in Percentage		
		Excellent	Fair	Poor
Diving/snorkeling	418	72%	27%	1%
Trekking	427	69%	29%	2%
Cultural events	299	74%	24%	2%
Bird watching	120	76%	21%	3%
War relics/Sites	205	63%	32%	5%
Forest/Wildlife	295	83%	16%	1%
Water rafting	12	33%	42%	25%
Canoeing/Skiing	32	41%	50%	9%
Surfing	32	25%	63%	12%
Museum/Art gallery	205	48%	35%	17%
Mt climbing	60	72%	22%	6%
Sport/Golf	15	40%	47%	13%
Swimming	137	56%	36%	8%
Honeymoon Value	23	30%	48%	22%
Shopping Value	127	17%	58%	25%
Relaxation value	295	39%	50%	11%
Fishing	58	59%	34%	7%
<b>Total Respondents</b>	<b>2760</b>			

Note: Only those who participated in the activities were able to value them. Otherwise, some visitors were reluctant to respond to this part of the questionnaire.

Majority (72%) of the respondents who engaged in diving and snorkeling valued these activities as very satisfying and were excellent. There were very favorable responds from visitors who participated in forest/wildlife, cultural events, and bird watching (83%, 74%, and 76% respectively). Some activities like surfing, shopping, water rafting, and canoeing/skiing were not to the expectation of the visitors (refer to Table 15 to comprehend the valuation of activities by the visitors).

Figure 10: Products Exploited by Visitors





Cultural shows and nature related activities like trekking and bird watching were high performance among the visitors. Diving and snorkeling, swimming, and visiting war relics were also high undertaken activities. Amongst the visitors, a fair number of them came for relaxation and rejuvenation.

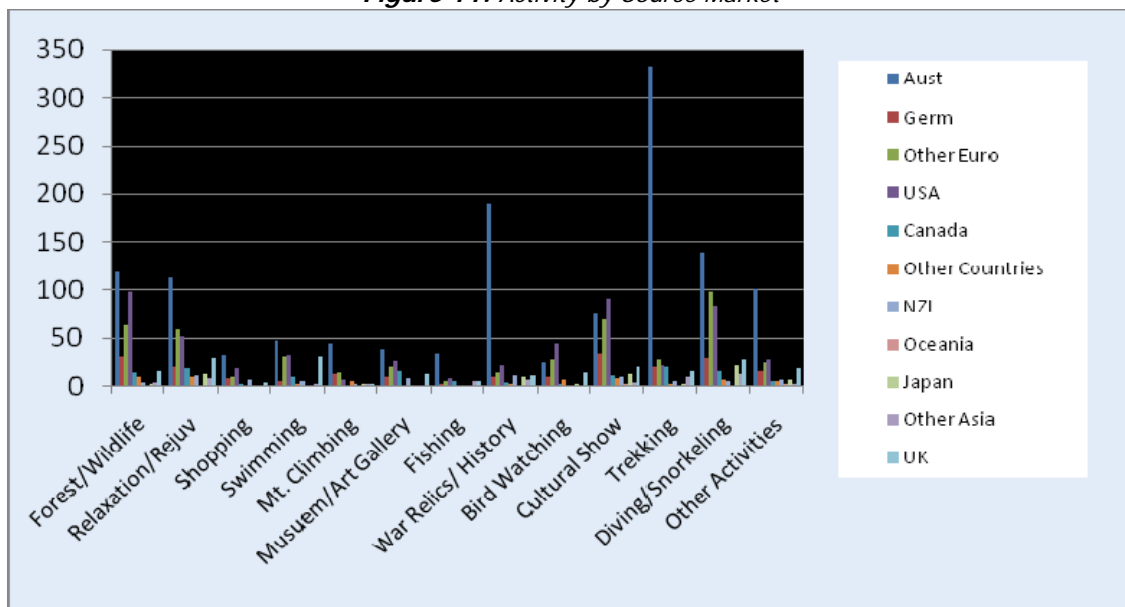
The visitors from Australia, USA, and the European markets undertook almost all of the activities, while visitors from the Asian markets took part in very few activities except for the visitors from the Japanese market.

Table 16: Activities by Market Area

Activities	Market Area											Total
	Aust	Germ	Other Euro	USA	Canada	Other Countries	NZL	Oceania	Japan	Other Asia	UK	
Diving/Snorkeling	139	29	97	83	16	7	4	0	21	12	26	434
Trekking	332	19	27	20	20	2	5	0	2	10	15	452
Cultural Show	75	34	68	90	11	8	9	2	12	4	19	332
Bird Watch	23	9	27	44	2	7	0	0	2	0	13	127
War Relica/History	189	9	13	21	4	3	10	0	9	7	10	275
Fishing	34	2	4	8	5	1	0	0	0	5	4	63
Water Rafting	5	0	1	1	0	1	0	0	0	0	1	9
Canoeing/Skiing/Surf	12	7	9	6	1	1	0	0	0	0	7	43
Museum/Art Gallery	38	9	19	25	16	0	8	0	0	1	11	127
Mountain climbing	44	11	13	6	1	5	2	0	2	3	2	89
Sports/Golf	10	0	0	0	0	0	1	2	0	1	3	17
Swimming	47	4	31	32	9	3	5	0	0	3	30	164
Honeymoon	5	0	7	1	2	0	0	1	0	0	0	16
Shopping	32	8	9	18	2	1	6	0	0	1	3	80
Relaxation/Rejuve	112	19	58	51	19	9	10	1	12	8	29	328
Forest/Wildlife	118	30	62	98	14	9	3	0	2	4	14	354
Cruising	27	3	4	9	0	3	3	0	0	0	4	53
Other Activity	24	4	3	10	2	0	2	0	0	1	2	48
Surfing	18	0	0	1	0	0	0	0	6	1	1	27
Total Responses	1284	197	452	524	124	60	68	6	68	61	194	3038
Total Respondents	683	61	157	234	47	28	52	10	31	114	83	1500

Trekking, war relics/history, museum & art gallery, and cultural shows which accounted for 41% are the most popular activities engaged by genuine holiday visitors. Visitors engaged in aquatic activities amounted to more than 24% and almost 20% were engaged in nature based activities.

Figure 11: Activity by Source Market



It can be inferred that a large number of those visitors who came for friends and relatives visitation also took part in the activities undertaken by genuine tourists. Nothing much can be evaluated with regard to activities undertaken for the visitors who came for other purposes apart from holiday and VFR because responses for this part of the questionnaire was limited only to genuine holiday visitors. This is depicted in the table below.

**Table 17: Activities Undertaken by Purpose of Visit**

Activities	Purpose of Visit							Total
	Business	Holiday	VFR	Church Work	Education	Work	Others	
Diving/Snorkeling	8	373	43	4	2	3	1	434
Trekking	7	413	12	10	5	4	1	452
Cultural Show	3	282	26	9	6	1	5	332
Bird Watch	2	116	4	1	3	0	1	127
War Relica/History	5	245	19	2	0	1	3	275
Forest/Wildlife	5	299	30	9	6	2	3	354
Fishing	5	38	11	3	2	2	2	63
Water Rafting	1	3	3	0	2	0	0	9
Canoeing/skiing	1	29	9	1	2	1	0	43
Surfing	2	20	4	0	0	0	1	27
Museum/art gallery	3	93	13	11	0	2	5	127
Mt. Climbing	1	77	5	2	2	1	1	89
Sports/Golf	0	10	5	0	2	0	0	17
Swimming	6	117	35	2	3	1	0	164
Honeymoon	0	14	2	0	0	0	0	16
Shopping	3	60	12	2	0	0	3	80
Relaxation/rejuvenat	6	247	57	12	1	2	3	328
Cruising	0	44	8	0	0	1	0	53
Other Activity	1	31	12	2	0	0	2	48
<b>Total Responses</b>	<b>59</b>	<b>2511</b>	<b>310</b>	<b>70</b>	<b>36</b>	<b>21</b>	<b>31</b>	<b>3038</b>

Note: This was a multiple response question, which one visitor responded to have undertaken more activities during the stay in the country.

### 5.5 Occupation:

Visitors were given the option to indicate their occupation:

**Table 18: Occupation & Market Area**

Occupation	Market Area											Total
	Aust	Germ	Oth.Euro	USA	Canada	Oth.Cou	NZL	Oceania	Japan	Oth. Asia	UK	
Private	214	18	76	68	12	17	13	2	11	79	29	539
Public	155	17	26	32	5	7	10	3	6	5	7	273
Retired/Pensioner	34	6	4	35	0	1	5	1	2	0	0	88
Homemaker	10	1	9	5	0	1	2	1	0	0	2	31
Student	90	3	10	28	18	0	6	2	2	11	13	183
NGO	47	4	2	9	3	2	3	0	0	5	12	87
Selfemployment	90	7	26	16	4	0	7	0	11	8	15	184
Pilgrimist	12	5	1	33	5	0	4	1	0	2	0	63
Other	29	0	3	8	1	0	2	0	0	4	5	52
<b>Total</b>	<b>681</b>	<b>61</b>	<b>157</b>	<b>234</b>	<b>48</b>	<b>28</b>	<b>52</b>	<b>10</b>	<b>32</b>	<b>114</b>	<b>83</b>	<b>1500</b>

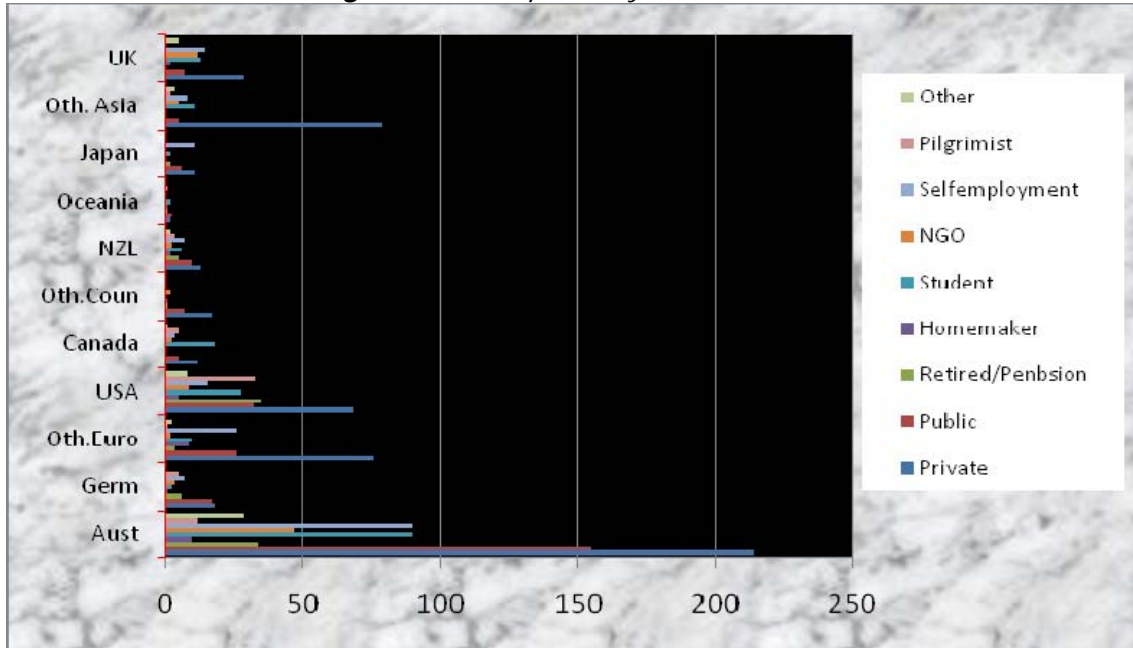
Most (36%) of the travelers work in the private sector, 18% came from the public sector, students made up 12.2%, followed by self-employed (12.1%), retired pensioners, church workers, NGO, and those that have other occupation amounts to almost 20%. Homemakers make up 2% of the total sample of the visitors surveyed.

By source market, more of the respondents said they work in the private sector. Of the Chinese nationals who visited PNG, 64% of them indicated that they work in the private industry. Respondents from the European markets had a fair share (41%) of them in the private sector. More than a quarter (31%) of the respondents from Australia also work in the private sector industry.

However, a notable number (34%) of respondents from Japan indicated that they were self employed. It should be noted that outcome for the Japanese visitors is very vague because not much data was collected for that market segment. Language barrier is one contributing factor and tailor made questionnaires should be provided for this market.

When compared to the total respondents of the visitors who came as students, most of them were from Australia and USA (49% & 15% respectively). USA had a higher percentage (52%) of the total respondents who visited as church workers.

**Figure 12: Occupation by Source Market**



## 6. Areas for improvement

**Table 19: Areas That Needs Improvement**

Areas Lacking Improvement	Market Area											Total
	Aust	Germ	Oth. Euro	USA	Canada	Oth. Coun	NZL	Oceania	Japan	Oth. Asia	UK	
Crime/Security	204	14	53	62	9	10	23	6	7	42	37	467
Bad Roads	53	16	4	31	0	5	5	1	0	5	5	125
Unemployment High	32	6	2	1	1	3	8	0	0	9	3	65
Bad Hospital	3	0	0	3	1	1	0	0	0	0	1	9
Expensive	56	9	27	22	4	6	3	1	4	21	13	166
Rubbish/Littering	96	8	28	35	2	5	6	2	0	11	10	203
Buai Stains	46	0	4	10	2	0	1	1	0	1	7	72
Power Blackouts	1	0	1	0	0	0	0	0	0	0	0	2
Govt Corruption	15	1	5	8	6	0	5	0	0	2	6	48
No advertising abroad	4	0	0	1	0	0	0	0	0	2	2	9
Poor tourism facility	34	6	19	31	2	3	2	0	0	12	6	115
Flights delay	13	3	4	3	6	1	0	0	1	2	0	33
Poor customer services	82	8	36	46	4	4	4	1	8	16	6	215
No broaddand internet	11	0	0	1	0	1	0	0	0	0	0	13
Total Responses	650	71	183	254	37	39	57	12	20	123	96	1542
Total Respondents	683	61	157	234	47	28	52	10	31	114	83	1500

The respondents were also given the opportunity to write comments on the questionnaire. Crime and security (30%), rubbish including betel nut stains (18%), poor customer services (14%), price of goods and services being expensive (11%), bad roads (8%), and poor tourism facilities (7%) continue to be major concerns for visitors.

There were also some comments about the high rate of unemployment (4%), level of corruption (3%); and delay of flights at the airports of PNG which frustrates and provides inconvenience for the visitors (2%). Visitors also suggested that there should be improvement made to the broadband internet service provided in the country and that improvements should be made in advertising PNG abroad.

### ***6.1 Crime/Security issues:***

Crime and security issue is a major hindrance for tourists to travel to PNG. Every international visitor to this country has a preconceived idea that it is not safe to move around and that extra precaution has to be taken when venturing out of town or even when moving out of their hotel rooms. Measures should be established to curb this problem and make PNG a desirable tourist destination where there should be high influx of tourists to enjoy all the tourism products this country has to offer. The bad media publicity is a major contributor to invoke negative notions of the country to international visitors. There are instances where visitors said that it is not that bad and that one has to experience all that this country has to offer before believing everything that is in the media.

Controlling the reporting of crimes and crises in our country is another bigger issue. The perception of Papua New Guinea among the international source markets, as reported, has been very dangerous and unsafe place. This negative perception among the source markets resulted from continuous bad media coverage abroad. Many visitors, during their visit to the country however, reported that the real of what they perceived and expected of the country was not as very serious as those evoked by the media.

Today's media communications are almost instantaneous. Radio, TV and internet can flash news globally in seconds. Twenty four hour news channels can detail every small movement in a story hour after hour. In such a world, it is easy to know how to manage communications in every aspect, even if we cannot control the media, we can do our best to influence it. It is important to inform potential visitors to PNG of its diverse cultures, the flora and fauna, the beautiful diving sites, the rugged terrains and the landscape itself. We can do a lot in selling the tourism products of PNG rather than feeding totally contradictory information to the source markets.

### ***6.2 Rubbish/littering issues:***

A better part (18%) of the respondents said that PNG'S towns and cities are not well kept. Littering is done without any concern, graffiti on walls is deplorable sight, betel nut husks and betel nut spits are a sore for the international visitors. Plastic bags strewn all over the place, markets at unregistered areas and improper drainage system were mentioned to be disgusting. These all constitute to the bad impression on the country which all in all act as slowing catalysts to tourism development.

Consumption and sale of betel nut (buai) is a very big problem in this country. This product contributes to a lot of rubbish and its spitting leave places look nasty. Relevant authorities have to merge efforts to minimize this problem and come up with a real solution that would be of benefit for the tourism industry and for general cleanliness for our towns, cities, and villages.

The citizens of PNG should be taught on the importance of keeping towns and cities clean. Tracks, beaches, and villages should be kept clean. Whether it is a local rest house, a bungalow, lodge accommodation or a hotel, they should be kept clean and hygienic at all times.

### ***6.3 Poor Customer services issues:***

Visitors have constantly raised their concern about the very slow, time-consuming delivery of services (especially at immigration), and constant cancellation of flights that has lead them to spend extra time and money beyond their budget. Bad impressions will continue to develop among the international source markets if we do not improve on these weakness areas.

Customer services at the airports, at hotels, lodges, resorts, and of other service providers were not to the expectation of the international visitors. A significant number (14%) of the exiting international visitors were not content with the providence of customer services. They argued that a lot is desired with regards to customer services. As usual, every visitor wants a memorable visit with very less hassle, where everything is to their expectation.

### ***6.4 Price issue:***

A fair part (11%) of the respondents bemoaned the ever- increasing price of goods and services in PNG. They could not believe the amount they have spent because it is three or four times more than they could elsewhere. They feel that surcharge of airline ticket and luggage fee is way too much compared to other countries. An amount for a single domestic airline ticket in PNG could buy them two airline tickets in other countries. To encourage more visitors to the country, the issue of price should be reasonable for the visitors.

A bird watching trip to Southern Highlands or a diving trip to New Ireland could cost a fortune to bird and diving enthusiasts. Concerns have also been raised for the prices put up for accommodation. The visitors thought that they have been charged unfairly for very low standard of accommodation and for facilities that were not present.

### ***6.5 Infrastructure Issue:***

The visitors complained that the country lacks basic infrastructure from the urban centers down to the rural areas. They said if the government could provide the basic infrastructure needs of Papua New Guinea, people would see great change in tourism and other economic activities in the country. Roads in PNG are important means of having access to many tourism spots and products but they are so poor and ill maintained that 8% of the visitors responded that it is an area that needs special consideration by the Government.

Infrastructure is an umbrella term for many activities and basic structures and facilities necessary for a country to function efficiently. Infrastructure includes public utilities such as buildings, transport, energy resources, roads, telecommunications, pipe borne water supply, ports, airports, etc. It has been designed as the totality of basic physical facilities upon which all other economic activities in a system depend.

The availability of efficient infrastructure services is a key requirement for the take-off of private investment. Regular and adequate power supply, good transportation and port facilities, as well as efficient telecommunications services are all necessary to complement private sector initiative in the production and delivery of services.

### ***6.6 Poor tourism facility issue:***

About 7% of the respondents reported that most of the nature based tourism products are very difficult for them to have access. There were in fact abundance of eco tourism products but they had very less information or otherwise, they found it difficult having access to them. For example, there were a lot of birds to watch but there were no readily made tracts into the bush or rest houses erected for shelter. Most visitors were confused as there were no information provided on what to expect or directions on where to go.

Most first time visitors are often confused which way to go to their desired specific places as there are no signs or directions given, especially on arrival within the international terminal area and on pathway indicating the terminals (international & domestic) or on streets directing to the hotels. It would be more appropriate if an office (PNG Tourism Office) is set up at the international airport staffed with 2 or 3 people who are knowledgeable with all the tourism products this country has to offer and the country's tourism destinations. The NCD Tourism Bureau Office at the Jacksons international airport cannot cater for all the visitors' needs with the very limited resources they have.

### ***6.7 Unemployment issue:***

Some (4%) of the respondents sympathized with the high unemployment rate in the country. They feel that there are more people not having access to quality education which results in many roaming the street doing nothing or literally begging or asking for alms and free handouts. They feel that the increase in law and order is a direct result of not engaging every able bodied and educated people in some form of employment. Only by then, living standards of average Papua New Guineans would improve which would have a domino effect in other sectors and for this case, the tourism sector.

This country would be a very desirable tourist destination if every or more of the citizens of this country had a decent life. Only by then, we would portray an image of a country inhabited not by bush knife and gun wielding savages but by generous and civilized people.

### ***6.8 Corruption issue:***

The notion that PNG is rife with corruption at every sector is a deterring factor for international travelers into this country. They always want to visit a country that does its dealings with no or very less corruption at all levels. Fair counts (3%) of the respondents feel that corruption should be minimized or otherwise, eradicated. Of these, almost all or majority of them were business opportunists and short term business travelers. In order to lure more international visitors into the country, corruption at all levels in the country should be discouraged.

Honesty prevails where there is no corruption and tourists would want to deal with very honest people. This means that they anticipate to seeing a fair price charged for an acceptable and equal service and product.

## **6.9 Flights efficiency issue:**

Delay of flights is a nagging problem for international visitors especially when they are scheduled to transit to other ports in overseas or within the domestic ports. This results in them missing their flights and causes disruption in their trip itinerary. Some (2%) of the respondents said that it is very frustrating to see too much flight delays at airports within PNG.

For the convenience of travelling passengers, all flights, whether they are domestic or international, should be on schedule time. For example, a delay in a flight to Singapore would do injustice to a UK visitor who would have boarded his plane after 30 minutes from the supposed arrival time. He will have to incur extra costs as a result of the flight delay in PNG.

## **7 Tourism Performance:**

### **7.1 Length of Stay:**

The total average length of stay for 2009 turned out to be 14.8 days which indicates that it has decreased from 18.1 days in 2007. This is a notable change and can be attributed to the global financial crisis combined with the deterring factors in the country that visitors are discouraged by. Even if there was a global financial crisis, conditions in the country should have been improved to go in sync with the trend. For majority of the visitors, the most frequent values were 8-14 days (47%) and 1-7 days (24.5%).

In terms of average stay by purpose of visit, education had a higher value of 44 days while visiting relatives and friends had 21 days in the year. The average length of stay for holiday was 13 days and 11 days for business.

The pattern for Holiday travelers is more evenly distributed from a range of one to seven, eight to fourteen, and fifteen to twenty one days reflecting the common length of days holiday travelers spend. However, majority (62%) of the visitors on holiday opted to stay for 8-14 days or for up to two weeks.

The length of stay for business visitors show a larger proportion (56%) who stayed for only a few days, ranging from one to seven days. This depicts a true outcome because only very short term business travelers were targeted when collecting the raw data. Actually, this may not truly reflect the number of days spent by short-term employees and business operators. The interview was controlled in that only business opportunists or very short term business travelers were sampled.

In 2009, the average length of stay for Japanese visitors is 11.3 days while in 2007 it was 11.2 days. For other source markets, slight decrease were noticed and the average length of stay were as follows; Asia's was 13.7 from 20.8 in 2007, UK's average length of stay was 17.3 from 20.1 in 2007, Australia's is 12.7 from 17.5 in 2007, and 14.4 days for New Zealand in 2009 from 18 days in 2007. The average length of stay for USA also saw a decrement from 19 days in 2007 to 16.1 days in 2009.

Germany had an increase from 16.8 days in 2007 to 20.3 days in 2009 and average length of stay for visitors from the Oceania region was 23.1 days in 2007 and in 2009, it is 37.7 days. This result signifies that there was more decrease than increase in average length of stay for market countries in 2009. This decrease is evident when in 2007, the total average length of stay was 18 days and in 2009 it is 14.8 days.



Japanese visitors were normally distributed between the 1-7 days and 8-14 days period. Visitors from the European and American markets are more evenly distributed in the range one to seven and eight to fourteen days. More visitors from USA, Canada, and UK, and visitors from other European countries tend to stay longer than 30 days.

### 7.2 Tourism expenditure:

The following section presents the results of question asked on spending by each visitor from the time of arrival to the time of departure. The denomination is PNG Kina and 2009 US Dollar exchange rate was at 0.3170 = K1

In Papua New Guinea, tourism is one of the main foreign exchange earners. It contributes about 2.5 percent to the Gross Domestic Product (GDP). The main source of information about the amount received from tourism is the visitor survey.

Hardly, any visitor remembers exactly how much have been spent during the stay in the country. Therefore the estimate calculation of total receipts may be more or less than the actual amount receipt in a year.

Based on the holiday/leisure arrivals figure from January to December, an estimate of overall tourist expenditure in Papua New Guinea is calculated. This is done by calculating the average daily expenditure per visitor from the individual countries of residence multiplied by the total number of holiday visitors from each country in the year and average length of stay for each country.

The total foreign exchange earnings in 2009 increased to 391 million Kina (US\$145m) from K300 million (US\$95.1m) in 2007 and K208 million (US\$65.5m) in 2007.

Table 20: Total Tourist Expenditure by Market Area

Market Area	Average Length of Stay	Tourist Arrivals	Daily Expd	Average/Head expenditure		Total Expenditure		%tage share
				Kina	US\$	Kina	US\$	
Australia	13	15,973	872.66	11,344.40	4,191.80	181,204,101	66,954,915.30	46.32
Germany	20	980	986.1	19,722	7,287.27	19,327,560	7,141,533.42	4.94
France	16	224	1,281.25	20,500	7,574.75	4,592,000	1,696,744	1.17
Other Europe	14	785	1,357.71	19,008	7,023.45	14,921,280	5,513,412.96	3.81
USA	16	3,012	1,088.17	17,410.70	6,433.25	52,441,028	19,376,959.80	13.4
Canada	25	457	466.68	11,667	4,310.95	5,331,819	1,970,107.12	1.36
Africa	12	178	833.33	10,000	3,695	1,780,000	657,710	0.45
Other country	19	361	1,078.95	20,500	7,574.75	7,400,500	2,734,484.75	1.89
NZL	14	862	1107	15500	5727	13361000	4936890	3
Oceania	38	631	190.79	7,250	2,678.87	4,574,750	1,690,370.13	1.17
China	9	509	1,333.33	12,000	4,434	6,108,000	2,256,906	1.56
Japan	11	2,032	1,500	16,500	6,096.75	33,528,000	12,388,596	8.57
Singapore	10	197	1,150	11,500	4,249.25	2,265,500	837,102.25	0.58
Philippines	14	1,489	913.28	12,786	4,724.43	19,038,354	7,034,671.80	4.88
Asia	14	623	712	9,968	3,683.17	6,210,064	2,294,618.65	1.59
UK	20	1,235	775	15,500	5,727.25	19,142,500	7,073,153.75	4.89
<b>Total Average</b>	<b>14.8</b>	<b>29,548</b>	<b>976.16</b>	<b>14,447</b>	<b>5,338.40</b>	<b>391,226,457</b>	<b>144,555,176</b>	<b>100</b>

The highest total expenditures were by Australia (US\$52.9 mill) followed by USA with (US\$11.8 mill), Japan (US\$7.6 mill), New Zealand (US\$4 mill). The total expenditure for UK, Germany, Other Europe, Other Countries; and Other Asia amounts to more than US\$3 million for each. Visitors from Philippines have spent more than US\$2 million and total spending for visitors from France and China accounts for more than US\$1 million. Total spending below US\$1 million were by Canada, Africa, and Singapore.

On average, as is particularly the case, holiday travelers (including VFR) spend the most while those here on business spend considerably less. The chart below signifies this.

*Table 21: Average Per Head & Daily Expenditure by Purpose of Visit*

Average Expenditure	Purpose of Visit							Total
	Business	Holiday	VFR	Educat'n	M & C	Church Work	Other	
Per head Expenditure (Kina)	15,628.85	7,689.75	5,565.23	22,960	3,175	9,540.83	7,825.64	10,019.36
Per head Expenditure (\$US)	4,954.34	2,428.14	1,764.18	7,278.32	1,006.47	3,024.44	2,480.73	317,508
<b>Length of Stay</b>	<b>11.49</b>	<b>13.15</b>	<b>18</b>	<b>43.66</b>	<b>7.35</b>	<b>23.17</b>	<b>12.56</b>	<b>14.8</b>
Daily Expenditure (Kina)	1,360.21	584.77	309.18	525.88	431.97	411.77	623.06	569.19
Daily Expenditure (\$US)	31.19	185.37	98.01	166.7	136.93	130.53	197.51	135.4
<b>Total</b>	<b>260</b>	<b>888</b>	<b>23</b>	<b>159</b>	<b>48</b>	<b>64</b>	<b>18</b>	<b>1500</b>

Outside of International airfare, which for the most part does not benefit PNG's economy directly, visitors spend the most on accommodation including meals and beverages, with these expenditure accounting for more than 23 percent of total expenditure. Other visitor expenditure categories that accounted for higher proportions of the spending were Tours (13%), Shopping (11.2%) and Domestic airfare (9%).

## **Findings and Recommendations**

- The use of internet by international visitors to source information on PNG has decreased in 2009. More than 24 percent of the visitors interviewed responded to have gained information about PNG from friends and relatives. This result confirms that visitors were more selective in choosing holiday destinations in the year 2009. Another reason why internet usage has declined is because of the lack of easily accessible websites. Therefore, well detailed and easily accessible websites should be developed by those involve in the tourism business and linked to the TPA website for effective distribution of the information to consumers.
- The highest number of visitors came from PNG's major market, Australia and majority of them came purposely for trekking. Diving and snorkeling also have high preference among most of the visitors. Therefore, more of these attractions should be promoted by tourism operators both in the internet and brochures/magazines.
- Total foreign earnings from holiday tourists in 2009 amounted to K391million or US\$145 million compared to the K300 million in 2007. The earnings in 2009 was higher by K11 million when compared by the forecasted earnings figure for 2008 which was K380 million.
- The overall average expenditure per visitor in Papua New Guinea was estimated at K14, 447 or US\$5,338.40. The average daily expenditure per visitor was K976.16.
- Information from Japanese visitors should be collected by designing a questionnaire in the Japanese language. It was very difficult to interview them as very few could understand the English language.
- Interviewers should be told of the importance of the data that is collected from the exiting visitors. The length of days in the country, places visited, and the estimated amounts spent per trip are important data and should not be altered. The visitors should be asked to provide only the amounts spent in the country. There is a flaw in calculating the total package cost because some of these payments are made to overseas tour operators and foreign airlines.
- Knowledgeable staff of TPA should be stationed at the International airport that would then provide all information that is needed by visitors who have not planned their itinerary in the country. There is a tourism office at the international airport but it caters for NCD and areas within its vicinity. Majority of the tourists come to the country without planning their trip until on arrival, therefore, the NCD Tourism Bureau at the airport should be well equipped with tourist information.
- Most (85%) of the holiday visitors travelled in groups with spouse, family or in a group tour. Very few decided to travel alone.
- A higher proportion (65%) of the visitors organized their own trip to PNG. Majority of them were visitors from the long-haul markets. This either implies that they were insufficient information about PNG as a tourist destination or it would also mean that the visitors decided to plan their own travel itinerary within the country according to their choice of product and activity.

- Culture was the most influential factor that motivated visitors. Every Papua New Guineans should be encouraged to embrace and preserve their unique cultures.
- Most of the visitors were concerned about crime and security, poor customer service, littering or of rubbishes strewn all over the place in towns and cities. Measures should be in place to reduce the repulsive effect that betel nut has on the surroundings.
- There was no proportionality in Provinces visited in 2009. Some had high visitation while others had very few or less visitation.

## APENDIX

### 2009 Visitor Survey Questionnaire




**Papua New Guinea Tourism Promotion Authority**  
**Year 2009 Visitor Exit Survey**

#### QUESTIONNAIRE

*Good morning/afternoon Sir/Madam.*

This is a **survey questionnaire** for the Papua New Guinea Tourism Promotion Authority and we are interviewing travelers returning from parts of Papua New Guinea in order to better understand what people did while in the country. All individual answers will remain anonymous with only the overall results being made public. Participation in this survey is completely voluntary. Do you consent to participate in this survey?

Yes                       No

Thank you. To answer the questions please cross or tick in the circle for your answer or write in your answer on the dotted line. Now let's begin.....

**SR** = *Single Response*      **MR** = *Multiple Response*

1. If you have visited PNG before, please state the number of your past visits: 0. None  
1. Once    2. twice            3. three times            4. four times            5. more than 5 times
  
2. How long did you stay in PNG on this trip? \_\_\_\_\_ *months* \_\_\_\_\_ *weeks* \_\_\_\_\_ *days* \_\_\_\_\_
  
3. What is your main Purpose of Visit: SR    1. Business            2. Holiday/Leisure            3. Visit Family/Friends    4. Education (Research)    5. Conference/meeting    6. Sports            7. Church work    8. Others (specify) - \_\_\_\_\_
  
4. If you visited for holiday, select the specific activity(ies) or attraction(s) you came for: MR  
1. Diving/snorkeling    2. Trekking    3 cultural shows/events    4. Bird/butterfly watch    5 War relics/history sites  
6. Forest/wildlife    7. Fishing    8. Water rafting    9. Canoeing/water skiing    10. Surfing    11. Museum & Art Gallery    12. Mountain climbing    13. Sports/Golf    14. Swimming    14. Honeymoon    16. Shopping    17. Relaxation/rejuvenation    18. Cruising    19. Other(specify) \_\_\_\_\_
  
5. If you have traveled to other countries for holiday/leisure reasons, what specific tourism activity do you look for?  
1. Diving/snorkeling    2. Trekking    3 cultural shows/events    4. Bird/butterfly watch  
5 War relics/history sites    6. Forest/wildlife    7. Fishing    8. Water rafting    9. Canoeing/water skiing  
10. Surfing    11. Museum & Art Gallery    12. Mountain climbing    13. Sports/Golf    14. Swimming  
14. Honeymoon    16. Shopping    17. Relaxation/rejuvenation    18. Cruising    19. Other(specify) \_\_\_\_\_

6. How would you compare the activities/attractions in PNG to those of other countries in terms of Price and Value?

Price			Activity	Value		
Expensiv	Fair	Cheap		Excellen	Fair	Poor
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Diving or snorkeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Trekking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Cultural Show events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Bird/Butterfly Watch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	War Relics/History sites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Rainforest & Wildlife	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Fishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	White Water Rafting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Canoeing/Water Skiing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Surfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Museum & Art Gallery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Mountain Climbing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Golfing/Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Swimming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Honeymoon	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Relaxation/rejuve	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Name the tour company from which you bought the package \_\_\_\_\_

Rate its services by selecting one of the options  
**3=Excellent 2=Fair 1=Poor**

Would you make any comment on the tour services?

7. Please name the places, towns, cities or provinces you have visited in the country on this trip? \_\_\_\_\_

8. Tell us what you see about this country interesting to you: \_\_\_\_\_

9. Is there anything that you dislike about this country? \_\_\_\_\_

10. Are you travelling alone or with (please select):  
1. Alone 2. Spouse 3. family/friends 4. Group tour ?

If you are traveling on a prearranged/prepaid packaged tour skip Q11& 13, if not answer them and skip Q14, Q15, & Q16.

11) Please indicate on estimate, how much you have spend for yourself on the following? (indicate currency)	Item	Amount
		Accommodation per night
	Return flight	
	Airfares in PNG	
	Tours & attractions	
	Shopping	
	Meals &Drinks	
	Land transport	

12. Write name beside the type of accommodation you used in PNG and rate is services.

3=Excellent; 2=Fair; 1=Poor

Accommodation	3	2	1
Hotel			
Resort			
Lodge			
Guest house			
Apartment			
Rented/Private home			
Other/specify			

13. Overall what is your budget for this trip including airfare? (indicate currency).....

14) If you bought a holiday package, how much did it cost? Cost of complete package .....

- 15) What is included in the package?  Return flight  Accommodation  Tours and attractions  
 Meals  Others \_\_\_\_\_

16) Excluding the total package cost, what were other additional cost?	Item	Amount	Currency
	Food & Drinks-		
	Handicrafts/Souvenirs-		
	Other shopping-		
	Other spending (specify- _____)		

17. Country of Residence \_\_\_\_\_ 18. Age \_\_\_\_\_ (in years) 19. Sex:  1 Male.  2 Female.

20. Marital Status:  1. Married  2. Single  3. Other (specify) \_\_\_\_\_

21. Select your appropriate Occupation (*Tick one*) SR

1. Private enterprises  2. Public sector  3. Retired/pensioner  4. Homemaker  5. Student  6. Non Government Organization  7 Self-employed  8. Church worker  9. Other (Pls specify) \_\_\_\_\_

22. How did you learn about Papua New Guinea? (*Please indicate the sources of information*) MR

1. PNG Tourism Website  2. Family & Friends  3. Travel Agent  4. Travel Books  
 5. Electronic Media  6. Print Media  7. Airlines  8. Travel Show/Fair  
 9. Magazines  10. Business  11. Internet  12. Lonely Planet  
 13. Overseas PNG Tourism Office  14. Others (please specify): \_\_\_\_\_

**We appreciate your time in answering the questionnaire and hopping to see you again.**

**Wishing you a pleasant and safe trip,**

**PNG Tourism Promotion Authority**