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## **2015 VISITOR EXIT SURVEY SUMMARY**

The PNG Tourism Promotion Authority is pleased to release the summary of the 2015 Visitor Exit Survey (VES) findings to its partners and key stakeholders in the tourism industry. The visitor survey project is an important component of the country's *Tourism Research Information Collection Program* and the findings are based on information gauged from 2,500 representative samples from each country or region, and the survey project was coordinated by the Marketing & Research Division of the Papua New Guinea Tourism Promotion Authority at the Jacksons International Airport - Departure Lounge.

The aim of the survey was to:

- profile the existing trends of visitors by the different markets and market segments;
- assess the travel behavioral 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;
- gauge opinions, reactions and general comments about PNG as a tourist destination;
- identify perception of non-holiday visitors about PNG as a tourist destination and to find out whether they will return as tourists and;
- to estimate how much they would spend in alternate destinations and motivational factors that are involved in them choosing those destinations.

From the results, the industry partners and key stakeholders can adjust their business practices in line with the current trend and improve in areas where necessary. The full survey report will be finalized soon and uploaded on our website: [www.papuanewguinea.travel](http://www.papuanewguinea.travel) for more detailed information.

### **Below is the summary of the survey findings:**

#### **Purpose of Visits:**

- About 34% of the respondents sampled in the 2015 Visitor Exit Survey were genuine holiday travelers. Almost 20% of the respondents sampled were in the country for business and 15% were here for short term employment. The other 31% sampled were from those visitors that visited their families or friends, or were here for church activities, conference/meeting or other purposes. This denotes a significant feedback for the attempt to find the desire of visitors to return as tourists and to discover the factors that hampers their return as tourist. Almost 75% of the respondents were eligible to say whether they will return as tourist and pointed out alternate countries if they were not returning and the motivators that are involved in them deciding a destination.

- Australia contributed a fair number of visitors for both holiday and business. Visitors from Scandinavia and Europe were skewed more towards holiday. Japan as usual has a larger proportion of its visitors in the holiday category. USA had an equal proportion of its visitors for holiday and other purposes. Majority of the visitors from New Zealand and Asian countries were on business or employment reasons.
- There were more (53.2%) responses from first time visitors followed by those that have frequented the country five times or more with a desirable (46.8%) portion. The feedback collected from the latter group is crucial because it will be possible to accurately portray the type of perception visitors have of this country as a tourist destination. They will also be in a better position to decide on coming back to PNG as tourists compared to the first time visitors. Australia had more (52%) repeat visitors. There were less repeat visitors from the USA market with only 26%, meaning that this was their first visit or have visited the country once. Most of the visitors from Europe were first time visitors.
- Majority of the Asians are repeat visitors. 62% of visitors from the Japan market were here for the first time or have visited the country once. 58% of respondents from business, employment, and other purposes said they will surely return to PNG with their family for holiday. 24% of those who affirmed that they will return further said that they'll recommend PNG as a desired tourist destination to their friends and other people back in their countries.

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

- The average length of stay (ALS) in 2015 was 23 days/nights.
- The average length of stay (ALS) of visitors from the long haul markets was slightly higher than 30 days.
- Japanese average length of stay was 14 days/nights, while the UK and German markets was 31 and 28 days/nights.
- The average length of stay for Africa, France, UK, and Scandinavia were the highest with 37, 35, 32, and 30 days respectively. The highest average length of stay was 48 for Philippines but this was considered insignificant as it is natural for visitors within the Asia region to stay longer in PNG while doing business or working.

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

- Business, Family/friends, and internet appeared to be the major sources of information for visitors to source information about Papua New Guinea. Purpose of visitors' visit to the country also dictates how they source information about the country. More responded that they source their information through friends and internet because a larger proportion of the samples interviewed in the country were for either holiday or business.
- Overseas PNGTPA office, Airlines, Travel Shows, and Print Media were also significant sources of information for the visitors. Again, it would have been very high impact source of information if we had concentrated more on the holiday visitors.
- Information through Family/Friends has picked up well in the long haul markets. Business and Internet have appeared to be the most used source of information amongst visitors from these markets.

### **Previous Visits:**

- 53.2 percent of the respondents were first time visitors while 46.8 percent were repeat visitors.
- Majority of the visitors from America, Japan, Germany, and from Canada were visiting Papua New Guinea for the first time, while many visitors from Australia, New Zealand and Asia have visited the country several times before.
- Most (54.6 percent) of the first time visitors to the country came for holiday/leisure reasons.
- More than 45% of the respondents from the European markets were first time visitors, who came mostly for holiday purpose.

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

- There was no proportionality in the distribution of visitors to the Provinces. Some regions had higher rate of visitation while others had very few visitors.
- The Provinces with higher visitation were NCD, Madang, Morobe, Milne Bay, ENB, Western Highlands and Eastern Highlands. However this varied across the different market segments and purpose of visit.
- Holiday visitors frequented more provinces than those that visited for other purposes. Those on holiday would like to cover more provinces as they possibly can and experience all that this country has to offer all the while in a short space of time. NCD, Rabaul, Milne Bay and Madang topped other provinces by being frequented by most of the holiday visitors.

### **Tourism Expenditure:**

- Total foreign earnings from tourism (genuine tourists) in 2015 amounted to more than K540 million (or US\$205 million) compared to the K460 million in 2014. Forecasted tourism earnings for 2015 was K600 million.
- The overall average expenditure per visitor in Papua New Guinea was estimated at K13,250.60 or US\$5,035. The average daily expenditure per visitor was K760.50 or US\$288.
- The highest daily expenditure per person, were visitors from China (K2,533.40 or US\$962.54), the American visitors (K954.18 or US\$362.52), and visitors from Canada (K810.92 or US\$308.15) and UK (K806.48 or US\$306.46) respectively. Daily expenditure per person per trip for the Australian market was K730.62 or US\$ 277.64. Visitors from Germany spent an average of K695.83 daily while being here.
- The level of expenditure by holiday tourists was highest in terms of average per person (K12,806 or US\$4,866.28).
- The country would have further gain an amount of K350 million (US\$133 million) from prospective tourists who choose other alternative destination.

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

- The majority of the Holiday visitors came to Papua New Guinea to enjoy and indulge themselves in the adventure tourism products that is abundant in the country. They also came to experience and enjoy the diverse cultures of PNG.
- Diving/Snorkeling and an interest in our Forest/Wildlife had the highest preference among most of the visitors. A fair component of the visitors came here just for relaxation and an even number of visitors were intrigued by trekking and the cultural events. Over 40% of responses from the Australian market indicated that they came for trekking and to see the war relics.
- Response rate for Kayaking, Surfing, Cycling, Water Rafting, and Mountain Climbing were low. We envisage that interest for these activities will pick up in the near future. We have developed and promoted cycling, kayaking, and surfing and hope that positive results will ensue.

### **Opinions and Reactions:**

- The Law and Order problem in PNG as always 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 as it happens everywhere in the world.
- Major factors mentioned to be discouraging travelers were litters everywhere and betel nut stains.
- Poor customer service, poor tourism facilities, and high costs of goods and services provided in Papua New Guinea with poor conditions of roads 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.
- Prospective tourists indicated that safety was guaranteed elsewhere and prices of goods and services in those alternate tourist destinations were cheaper.
- A good number of respondents that visited PNG other than for holiday indicated that they will return as tourist. Even when some said they'll decide on alternate destination, they still said they will recommend PNG as a tourist destination to their friends.

### **Key Recommendations:**

- The use of internet by international visitors to source information on PNG is growing rapidly. More than 40 percent of the visitors responded to have used Internet as their source of information. This result continues the upward trend of Internet use from year 2005 and the highest use observed to date, which confirms the importance of the Internet as a source of information. Therefore, well detailed and easily accessible websites should be developed by those involve in the tourism business and link to the TPA website for effective distribution of the information to consumers.

- A good number of visitors (especially the younger and older age group) have also indicated ‘Word of Mouth’ as the main source of information to know about Papua New Guinea and its tourism potentials. So, for visitors to tell other people in their country the good things about PNG, tourism operators and service providers must give the tourists quality and value for money services.
- The use of Brochures/Magazines is another growing form of information source. Therefore, more up-to-date Brochures and Magazines should be developed and distributed to key wholesalers and retailers during Trade Shows and Workshops.
- The majority of the Holiday visitors came to Papua New Guinea to experience and enjoy the attractive scenery of both underwater and land, and the diverse cultures. Diving, Tracking and Water Sports (including surfing, fishing canoeing, swimming, rafting) have the highest preference among most of the visitors. Sight-seeing and nature related activities also had higher preference among the respondents. Therefore, more of these attractions should be promoted by tourism operators both on the internet, in travel shows and brochures/magazines.

#### **Areas of Concerns and improvements:-**

- Many international visitors to Papua New Guinea have sighted high cost of services in the country as major hindrance to travel to the country. This has been and is still an area of concern. When there is high cost on travel and other tourism related services, there is less choice of travel. During this time, when PNG’s economy is getting stronger due to the LNG project and other mining activities around the country, the PNG Kina is expected to further appreciate against most of the major world currencies making PNG an expensive destination for visitors. Therefore, all our tourism industry players including, tour operators, accommodation service providers, airlines and other tourism service providers in the country should lower the price of their services in line with the percentage gained in value of the PNG Kina so that the services become affordable to visitors.
- Nowadays tourism destinations around the world are struggling with the issue of traveler safety. Many of the visitors to PNG reported that at the top of their list of reasons not to travel internationally is the concern for personal safety. Furthermore, the visitors have stressed heavily that crime and safety issue in the country is a big concern. Though Papua New Guinea can be guaranteed as safer destination than other countries now facing bigger safety challenges, the internal phenomena such as robbery and holdups on international visitors are very dangerous to tourism development. As tourism is everyone’s business, it is absolute concern of every Papua New Guinean to make sure international visitors have safety and peace of mind in our provinces and homes they visit.
- 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 countries in Europe and Asia. Today’s media communications are almost instantaneous. Radio, TV and internet can flash news globally in seconds. 24 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 a crisis, even if we can't control the media, we can do our best to influence it. It is essential, we can reduce the negative aspects of things every time and carefully put the country’s positive side of the story, take control and look concerned.

- The visitors complained that the country lacks basic infrastructure from the provincial down to the village level. 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. 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.
- While infrastructure are the basic services of a country, the issue of efficiency in delivering certain services in PNG are also discussed based on visitors comments. Visitors have constantly raise their concern about being very slow-time-consuming delivery of services (especially at immigration), ill-maintained toilets, poor transport (taxi) services 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 to the international source markets if we do not improve on these weakness areas.
- Some respondents reported on the unavailability of Directions and Signage at certain places where required. 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. Therefore, the relevant authorities or concerned parties should improve in these areas.
- A good number of visitors also commented on the general hygiene and graffiti on walls within the vicinity of main centers. Rubbish including plastic bags, beetle nut husks/stains, and markets at unregistered areas and improper drainage system were mentioned to be disgusting. These all constitute bad impression on the country, which all in all act as slowing catalysts to tourism growth and development. Therefore, the relevant authorities MUST put some control measures to improve in these areas.

For more information, please contact our research team or visit our website [www.papuanewguinea.travel](http://www.papuanewguinea.travel).

Thank you.

#### Marketing & Research Division

#### PNG Tourism Promotion Authority

Pacific MMI Building, Level 5, Port Moresby  
P.O. Box 1291, Port Moresby, Papua new Guinea  
Ph: (675) 320 0211, Fax: (675) 320 0223

