PACIFIC TOURISM ORGANISATION

2023 ANNUAL VISITOR ARRIVALS SNAPSHOT

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2023 ANNUAL GLOBAL TOURISM PERFORMANCE OVERVIEW

An estimated 1286 million international tourists (overnight visitors) were recorded around the world in 2023, an increase of 34% over 2022, or 325 million more. This puts international tourism at 88% of pre-pandemic levels in 2023, following a sustained recovery, especially during the first half of the year supported by strong pent-up demand and increased connectivity.

July, September and October 2023 were particularly strong months, with arrivals reaching 92% of 2019 levels. The Northern Hemisphere summer months of June, July and August accounted for one third of total arrivals recorded in 2023. Europe welcomed 700 million of the 1.3 billion travellers recorded globally in 2023, or 54% of the world total. The Middle East, Europe and Africa performed strongest in 2023. The Middle East led the recovery by regions in relative terms, being the only region to overcome pre-pandemic levels with arrivals 22% above 2019.

Europe, the world's most visited destination region, reached 94% of pre-pandemic levels in 2023, supported by robust intra-regional demand and travel from the United States. According to the US National Travel and Tourism Office (NTTO), US travel to Europe grew 29% through October (compared to 2022) and represents 21% of total US overseas travel.

Source: World Tourism Barometer January 2024

Africa recovered 96% of pre-pandemic visitors in 2023, with robust demand from European markets, with Ethiopia (+30%), Tanzania (+20%) and Morocco (+11%) all exceeding their 2019 numbers through October or November 2023. The region saw buoyant recovery in international connectivity on intra-regional routes and to Europe and the Middle East. Arrivals in the Americas reached 90% of 2019 numbers in 2023, backed by solid intra-regional demand. Strong travel from the United States benefitted in particular Caribbean and Central American destinations.

Asia and the Pacific reached 65% of pre-pandemic levels, with a gradual recovery since the start of 2023 following the reopening of several markets and destinations.

Visitor Arrivals to SPTO member countries stood at 2,637,317 which marked a substantial 89% rise over 2022. 1,959,132 arrived by Air and 678,185 arrived by cruise ships. Challenge to collect data from NTOs/NSOs still remains; however improvements have been made by enhancing networking efforts.

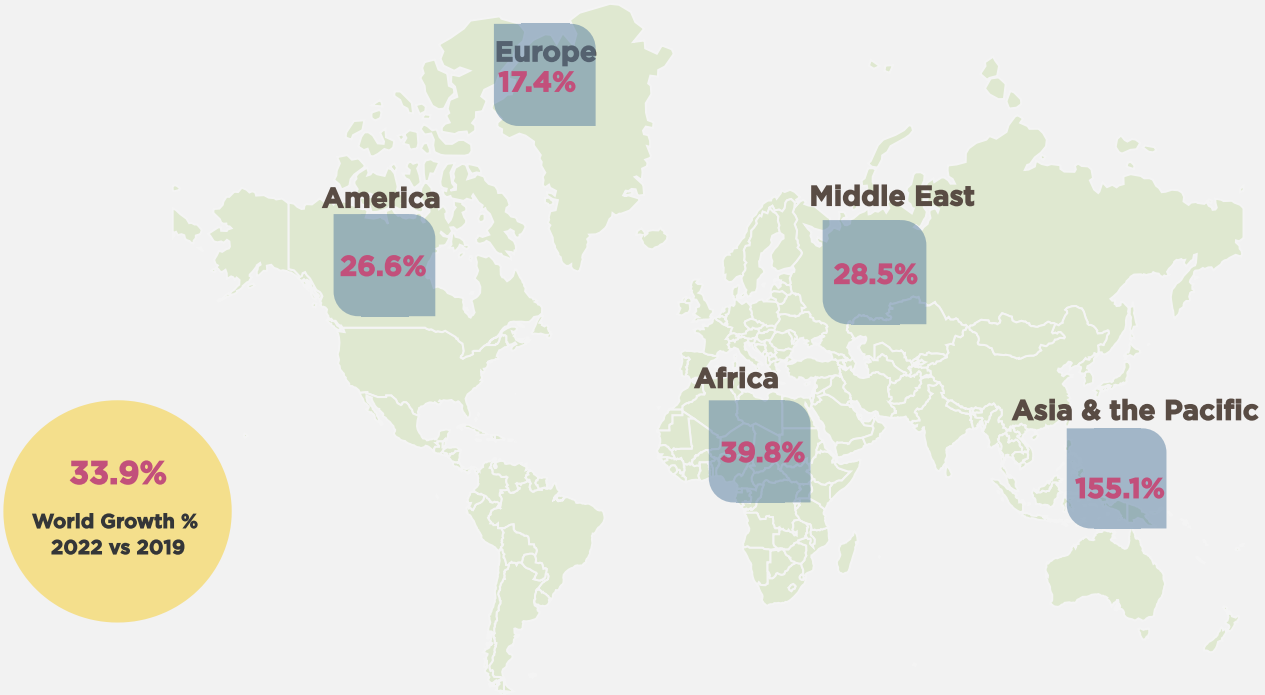
By destination shares, Fiji accounted for 51% of the total air visitor arrivals to the region, with French Polynesia at 14%, Cook Islands at 8%, New Caledonia 6%, American Samoa at 4%, Samoa at 4%, Vanuatu at 4% and the remaining 9% is made up of PNG 3%, Tonga 3%, Solomon Islands 1% and others 2%.

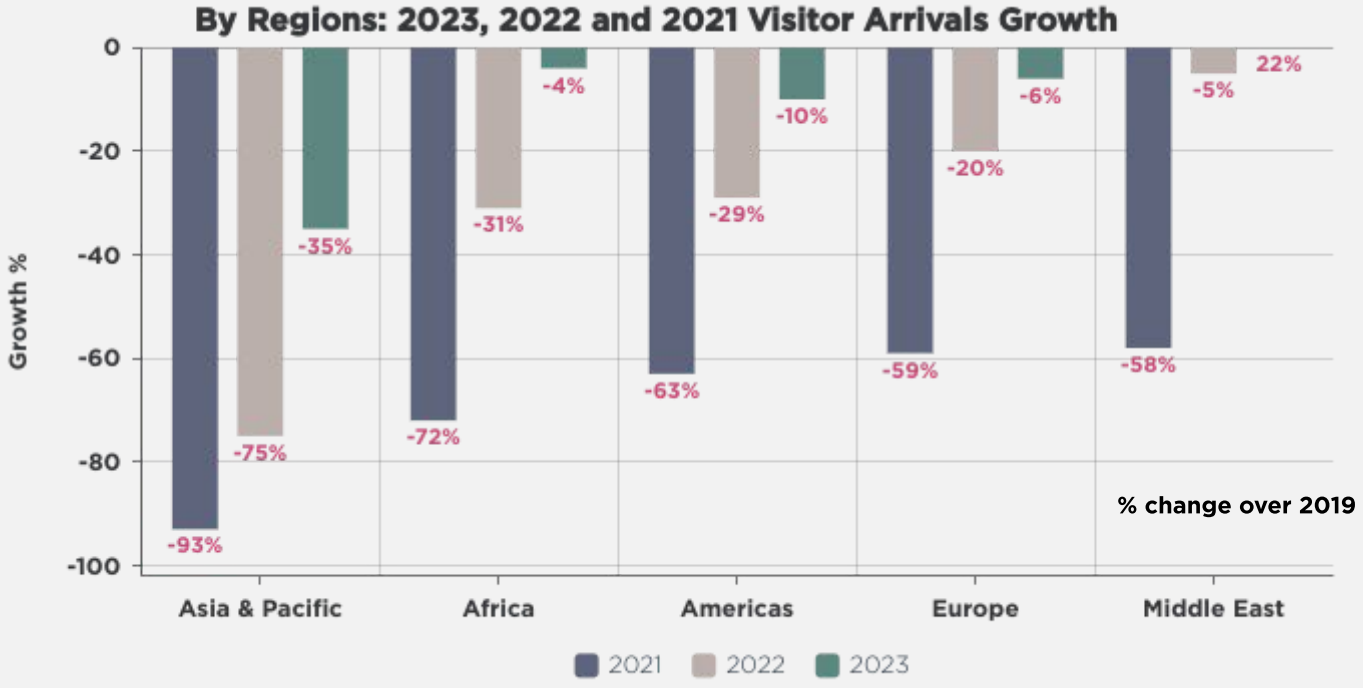
New Caledonia accounted for 34% of the total cruise visitor arrivals, followed by Vanuatu at 38% and Fiji at 12% and the remaining 16% is made up of French Polynesia (6%), American Samoa (3.0%), Tonga (5%), Kiribati (1%) and Cook Islands (1%).

Source: World Tourism Barometer January 2024

GLOBAL TOURISM PERFORMANCE 2023

2023 International Tourist Arrivals Growth from 2022 By Region





Source: UNWTO Barometer January, 2024

GLOBAL TOURISM ECONOMIC IMPACT

GPD contribution

9.1

Global Tourism contribution to the worlds GDP increased by 23.2% from 2022 and 4.1% below 2019 level

Employment

27m new Jobs

Representing a 9.1% increase on 2022 and only 4.1% below 2019

Visitors spending

33.1% Rise

Increase in International visitor spending compared to 2022 but still 14.4% behind 2019 numbers

Source: World Travel & Tourism, Economic Impact Report (2023)

Pacific Destinations 2023

Total Visitor Arrivals (Air)

1,959,132

Absolute Change

731,726

Percentage Change

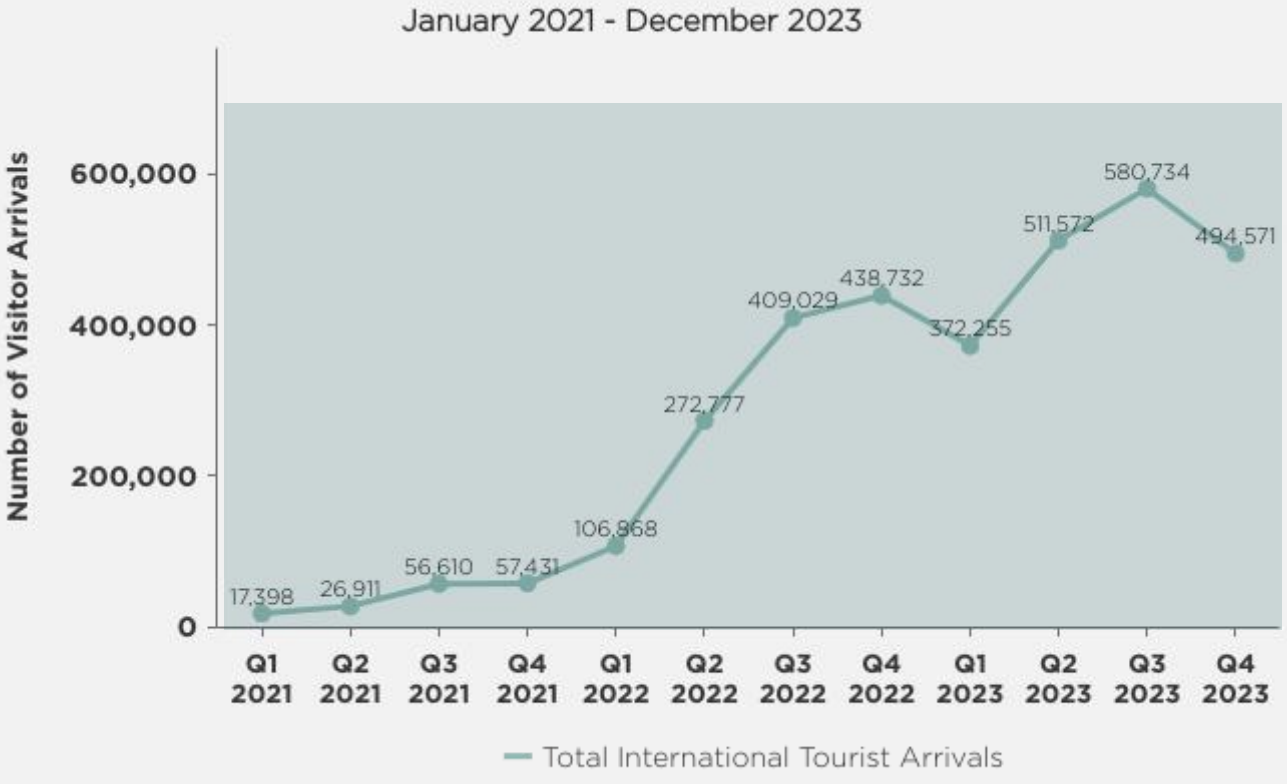
60%

Breakdown of Pacific Island Destinations 2023

PACIFIC ISLAND DESTINATIONS	2022 VISITOR ARRIVALS (AIR)	2023 VISITOR ARRIVALS (AIR)	ABSOLUTE CHANGE	% CHANGE
American Samoa	-	64,661	-	-
Cook Islands	113,346	143,506	30,160	27%
FSM	1,978	1795	-183	-9%
Fiji	636,312	929,740	293,428	46%
French Polynesia	218,750	261,813	43,063	20%
Kiribati	1,770	8,224	6,454	365%
Marshall Islands	1,346	6,046	4,700	349%
Nauru	20	237	217	1085%
New Caledonia	78,641	111,472	32,831	42%
Niue	-	2414	2414	-
PNG	70,123	112,775	42,652	61%
Samoa	47,059	174,967	127,908	272%
Solomon Islands	7,365	26,036	18,671	254%
Timor Leste	-	-	-	-
Tonga	18,427	55,749	37,322	203%
Tuvalu	59	570	511	866%
Vanuatu	29,143	53,875	24,732	85%
Wallis & Futuna	3,067	5,252	2,185	71%

Source: NTOs, NSOs and SPTO

INTERNATIONAL VISITOR ARRIVALS (AIR) TO THE PACIFIC



Breakdown of Annual Visitor Arrivals: 2021 - 2023

QUARTERS	2021	2022	2023	% CHANGE 2023 VS 2022
March	17,398	106,868	372,255	248%
June	26,911	272,777	511,572	88%
September	56,610	409,029	580,734	42%
December	57,431	438,732	494,571	13%

Source: NTOs, NSOs and SPTO

TOTAL VISITOR ARRIVALS (AIR) BY PACIFIC GROUPINGS 2023

Melanesia

Fiji, New Caledonia, PNG, Solomon Islands, Vanuatu

2022 - 821,584
2023 - 1,233,898

50%

Polynesia

Cook Islands, French Polynesia, Samoa, Tonga, Tuvalu

2022 - 400,708
2023 - 708,932

77%

Pacific Sub-Regions *Total*

2022 - 1,227,406
2023 - 1,959,132

60%

Micronesia

FSM, Kiribati, Marshall Islands, Nauru

2022 - 5,114
2023 - 16,302

219%

Other

Timor Leste

2022 - 0
2023 - 0

0 %

Source: NTOs, NSOs and SPTO

TOTAL VISITOR ARRIVALS (AIR & CRUISE)

2023

2,637,317

Total Visitor Arrivals 2023

Total Air Visitor Arrivals 2023

1,959,132

Total Cruise Visitor Arrivals 2023

678,185

2023 Annual against 2022 Annual

1,239,927

Absolute Change

89%

Percentage Change

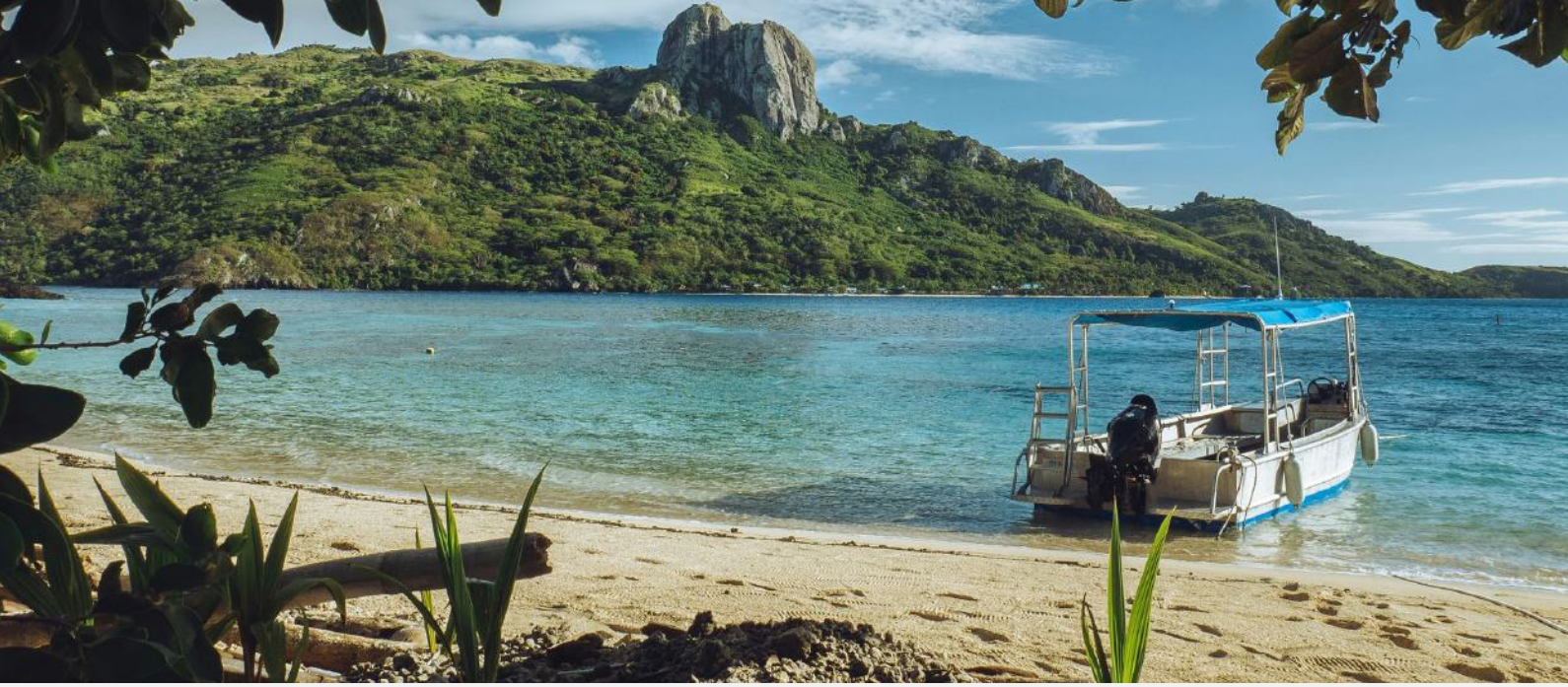
1,397,390

Total Visitor Arrivals 2022

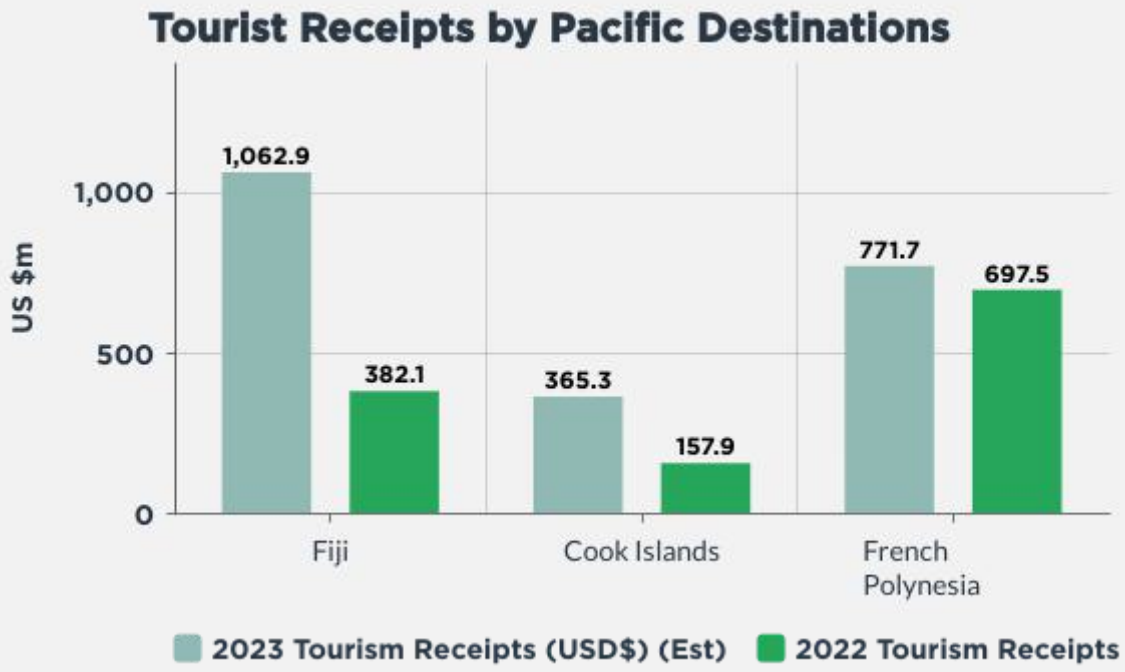
Breakdown of Total Visitor Arrivals

PACIFIC ISLAND DESTINATIONS	2023 VISITOR ARRIVALS (AIR)	2023 VISITOR ARRIVALS (CRUISE)	2023 VISITOR ARRIVALS (AIR + CRUISE)	% SHARE OF 2023 VISITOR ARRIVALS (AIR + CRUISE)
American Samoa	64,661	17,392	82,053	3.11%
Cook Islands	143,506		143,506	5.44%
FSM	1795	518	2,313	0.09%
Fiji	929,740	83,473	1,013,213	38.42%
French Polynesia	261,813	43,815	305,628	11.59%
Kiribati	8,224	-	8,224	0.31%
Marshall Islands	6,046	-	6,046	0.23%
Nauru	237	-	237	0.01%
New Caledonia	111,472	236,048	347,520	13.18%
Niue	2414	-	2,414	0.09%
PNG	112,775	-	112,775	4.28%
Samoa	174,967	7,784	182,751	6.93%
Solomon Islands	26,036	-	26,036	0.99%
Timor Leste	0	-	-	0.00%
Tonga	55,749	25,577	81,326	3.08%
Tuvalu	570	-	570	0.02%
Vanuatu	53,875	263,578	317,453	12.04%
Wallis & Futuna	5,252	-	5,252	0.20%

Source: NTOs and NSOs



TOURISM INSIGHT SNAPSHOT 2023



COUNTRIES	2022 TOURISM RECEIPTS $US	2023 TOURISM RECEIPTS $USM	2022 TOURISM RECEIPTS TOWARDS GDP
Fiji	382.1	1,062.9	9.9%
Cook Island	157.9	365.3	68.4%
French Polynesia	697.5	771.7	9.0%

Source: NTOs and NSOs
Only 3 member countries submitted the 2022 Tourism Receipts and some estimates of 2023 receipts, Rest of the NTOs reported that there is no data available

Breakdown by Pacific Destination

PACIFIC ISLAND DESTINATIONS	YEAR (LATEST UPDATE)	AVERAGE LENGTH OF STAY
American Samoa	2017	8.1
Cook Islands	2023	10.0
FSM	2019	9.0
Fiji	2023	9.5
French Polynesia	2023	15.8
Kiribati	2019	9.8
Marshall Islands	2016	18.5
New Caledonia	2022	21.9
Niue	2022	9.1
PNG	2022	15.0
Samoa	2022	8.4
Solomon Islands	2022	12.0
Timor Leste	2017	10.0
Tonga	2019	13.0
Vanuatu	2023	12.0

Source: NTOs, NSOs and SPTO
: Latest IVS Reports

Tourism Accomodation

5,426

Total number of Accommodation

33,359

Total Number of Rooms

70,889

Total Number of Beds

Breakdown by Pacific Destination

PACIFIC ISLAND DESTINATIONS	YEAR (LATEST UPDATE)	TOTAL NO. OF ACCOMODATIONS	TOTAL NO. OF ROOMS	TOTAL NO. OF BEDS
American Samoa	2020	20	263	395
Cook Islands	2023	658	2,941	7,348
FSM	2020	29	350	480
Fiji	2023	421	9,598	21,156
French Polynesia	2023	2,450	7,030	21,735
Kiribati	2022	60	603	942
Marshall Islands	2022	8	0	0
Nauru	2015	8	40	50
New Caledonia	2022	280	0	0
Niue	2020	39	197	273
PNG	2022	512	6,207	8,951
Samoa	2022	163	2,813	0
Solomon Islands	2022	277	2,310	4,139
Timor Leste	2019	64	500	900
Tonga	2022	278	638	909
Tuvalu	2016	10	50	60
Vanuatu	2023	153	1,837	3,551

Source: NTOs, NSOs & SPTO Estimates

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Annexure 1: Tourist Arrivals (Air) to SPTO Member Countries

DESTINATIONS	ANNUAL						2022				2023			
	2018	2019	2020	2021	2022	2023	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
American Samoa	20,221	19,237	748	-	0	64,661					15,186	16,822	17,814	14,839
Cook Islands	168,760	171,606	25,073	26,330	113,346	143,506	10,394	31,001	40,867	31,084	20,954	34,435	47,345	40,772
FSM	19,207	19,712	-	-	1,978	1795	1		388	1,589	346	329	444	676
Fiji	870,309	894,389	146,905	31,618	636,312	929,740	48,906	156,623	221,405	209,378	175,284	242,568	271,290	240,598
French Polynesia	216,458	236,642	77,017	82,546	218,750	261,813	30,100	56,603	66,052	65,995	55,188	67,394	72,818	66,413
Kiribati	6,895	7,906	1,409	34	1,770	8,224	21	63	512	1,174	1,219	2,037	2,649	2,319
Marshall Islands	6,347	10,771	-	-	1,346	6,046	42	276	297	731	1,003	1,353	1,823	1,867
Nauru	-	-	-	-	20	237			6	14	47		78	112
New Caledonia	120,343	130,458	31,228	12,446	78,641	111,472	6,901	12,099	24,596	35,045	26,032	28,152	33,439	23,849
Niue	10,502	10,560	-	-	0	2414	-	-	-	-	-	-	2,414	-
PNG	121,503	159,563	38,665	16,758	70,123	112,775	9,842	14,927	20,420	24,934	25,671	29,282	31,151	26,671
Samoa	167,651	173,920	20,485	0	47,059	174,967			14,579	32,480	30,136	47,460	48,620	48,751
Solomon Islands	27,866	28,930	4,440	737	7,365	26,036	275	360	2,478	4,252	3,940	5,055	5,626	11,415
Timor Leste	113,245	111,400	-	-	0	0	-	-	-	-	-	-	-	-
Tonga	54,046	67,517	8,932	-	18,427	55,749	146	452	4,698	13,131	9,086	13,750	17,634	15,279
Tuvalu	3,242	3,611	-		59	570		47	12		570			
Vanuatu	115,634	120,628	21,965	-	29,143	53,875			11,817	17,326	6,558	21,537	25,780	-
Wallis & Futuna	4,207	4,637	2,902	-	3,067	5,252	240	326	902	1,599	1,035	1,398	1,809	1,010
Total	**2,046,436**	**2,171,487**	**379,769**	**170,469**	**1,227,406**	**1,959,132**	**106,868**	**272,777**	**409,029**	**438,732**	**372,255**	**511,572**	**580,734**	**494,571**

Source: NTOs, NSOs and SPTO
2019 Pre-Covid Tourist Arrival Numbers by Pacific Destinations
2023 Tourist Arrival Numbers by Pacific Destinations

Annexure 2: Tourist Arrivals (Air) to SPTO member countries by Source Market

SOURCE MARKETS	ANNUAL					
	2018	2019	2020	2021	2022	2023
Australia	619,145	638,085	103,061	23,982	436,740	635,636
New Zealand	473,662	487,788	59,026	27,431	305,492	462,261
United States of America	215,983	248,730	57,692	40,055	174,296	279,521
United Kingdom	33,175	35,058	6,875	722	12,041	18,908
Europe	205,315	228,327	62,707	43,398	149,541	193,776
China	83,646	85,284	13,687	3,726	11,703	47,551
Japan	55,575	56,967	9,598	423	4,224	18,864
India	10,174	13,181	3,145	1,119	5,792	11,089
South Korea	12,745	11,725	1,011	151	1,691	3,585
Other Asia	123,918	138,562	18,268	8,519	33,879	54,943
Pacific Islands	154,892	166,213	32,206	5,392	56,595	162,194
Other Countries	58,207	61,567	12,492	3,230	35,412	66,433
Total	**2,046,436**	**2,171,487**	**379,766**	**158,148**	**1,227,406**	**1,954,761**

2022				2023			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
39,124	101,978	138,054	157,584	120,237	170,074	183,080	162,245
13,020	65,271	121,934	105,267	70,250	125,084	150,828	116,099
23,515	45,208	47,068	58,505	62,927	73,602	71,057	71,935
938	2,846	3,987	4,270	4,347	4,542	5,394	4,625
16,333	32,857	52,814	47,537	35,699	46,766	64,759	46,552
907	2,213	3,452	5,131	6,078	12,887	17,085	11,501
247	660	1,187	2,130	2,753	4,383	6,398	5,330
784	1,437	1,742	1,829	2,901	2,766	2,625	2,797
118	322	481	770	753	885	1,043	904
4,176	7,079	10,478	12,146	12,674	13,620	16,122	12,527
4,096	5,903	17,659	28,937	37,724	38,985	42,936	42,549
3,610	7,003	10,173	14,626	15,568	17,670	16,471	16,724
106,868	**272,777**	**409,029**	**438,732**	**371,911**	**511,264**	**577,798**	**493,788**

Source: NTOs, NSOs and SPTO
2019 Pre-Covid Tourist Arrival Numbers by Source Markets
2023 Tourist Arrival Numbers by Source Markets
* Not all countries provided data on source markets in 2023

Annexure 3: Pacific Groupings

MELANESIA	2022	2023	% Change 2023 vs 2022	2023 Annual % Share
Fiji	636,312	929,740	46%	77.7%
New Caledonia	78,641	111,472	42%	9%
PNG	70,123	112,775	61%	5%
Solomon Islands	7,365	26,036	254%	2%
Vanuatu	29,143	53,875	85%	6.3%
Total	**821,584**	**1,233,898**	**50%**	**100%**

POLYNESIA	2022	2023	% Change 2023 vs 2022	2023 Annual % Share
American Samoa	0	64,661	-	10.6%
Cook Islands	113,346	143,506	27%	23.6%
French Polynesia	218,750	261,813	20%	43.2%
Niue	-	2114	-	-
Samoa	47,059	174,967	272%	12.3%
Tonga	18,427	55,749	203%	9%
Tuvalu	59	570	866%	0.5%
Wallis & Futuna	3,067	5,252	71%	0.8%
Total	**400,708**	**708,632**	**77%**	**100%**

MICRONESIA	2022	2023	% Change 2023 vs 2022	2023 Annual % Share
FSM	1,978	1795	-9.25%	11.0%
Kiribati	1,770	8,224	365%	50.4%
Marshall Islands	1,346	6,046	349%	37.1%
Nauru	20	237	1085%	1.5%
Total	**5,114**	**16,302**	**219%**	**100%**

OTHER	2022	2023	% Change 2023 vs 2022	2023 Annual % Share
Timor Leste	-	-	-	-

PACIFIC SUB - REGION % SHARE	2022	2023
Melanesia	67%	65.90%
Polynesia	32.60%	33.30%
Micronesia	0.40%	0.80%
Other	-	-
Total	**100%**	**100%**

Source: NTOs, NSOs and SPTO