



**PACIFIC REGIONAL TOURISM CAPACITY BUILDING PROGRAMME
(PRTCBP)**

**QUARTERLY REVIEW OF
TOURISM
QUARTER 3 & QUARTER 4, 2013**



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Overview of World Tourism

Table W1 below provides comparative analysis of the five regions of the world. During the last quarter of 2013, the African region was the fastest growing region of the world with a growth rate of 6.1%. The regions of Americas and Asia & Pacific registered the next highest growth rates of 5.1% and 4.5% respectively. The European region grew at 3.9% and Middle East region declined by -6.8%. During this same period, World tourism grew at 3.8%.

Table W1: % Change of Tourist Arrivals in Major Regions of the World by Quarter

Region	Q3, 2012	Q3, 2013	Q4,2012	Q4, 2013
Asia& Pacific	4.7	7.2	6.9	4.5
Europe	3.0	5.8	4.5	3.9
Middle East	-17.1	-20.6	-6.1	-6.8
Africa	8.5	7.4	2.5	6.1
Americas	3.8	4.6	3.9	5.1

Source: UNWTO and SPTO

The last two quarters of 2013 showed declines in the number of tourist arrivals into the Pacific ACP and SPTO member countries by -2.7% in quarter 3, 2013 and -1.7% in quarter 4, 2013 as compared to the same quarters of the previous year. Fiji, French Polynesia, New Caledonia, Palau and Samoa recorded declines for the last two quarters of 2013 over the same period in 2012. The small Island countries of Kiribati, Marshall Islands and Niue recorded positive growths during the last two quarters of 2013.

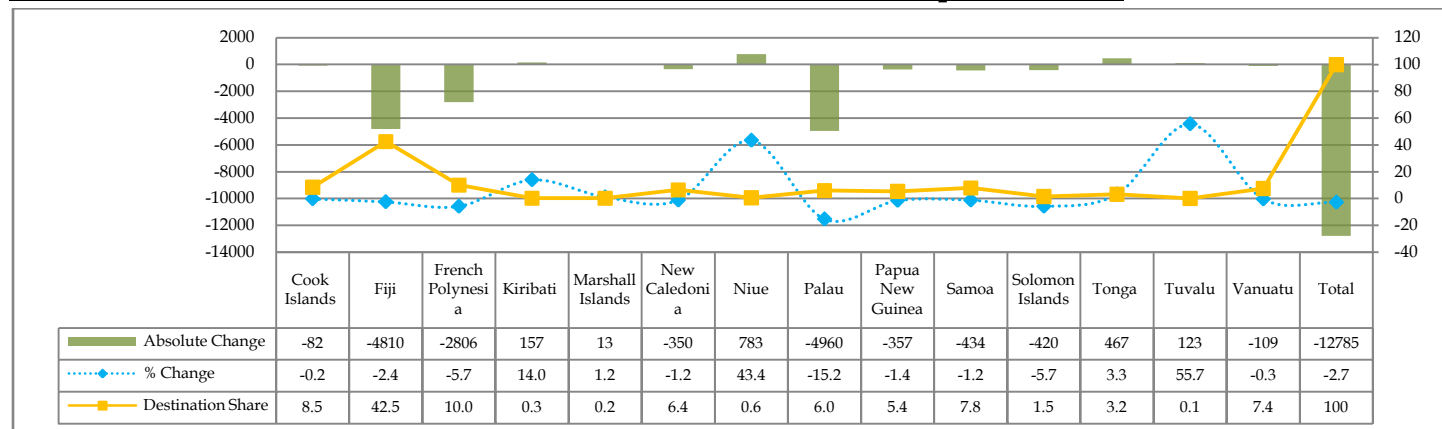
R1: tourist arrivals to Pacific ACP and SPTO member countries in Q3 and Q4 2013

Destination	Q3, 2012	Q3, 2013	Absolute Change	% change	Q4, 2012	Q4, 2013	Absolute Change	% change
Cook Islands (r)	39,113	39,031	-82	-0.2	31,571	31,902	331	1.0
Fiji	200,314	195,504	-4,810	-2.4	169,496	165,415	-4,081	-2.4
French Polynesia	48,925	46,119	-2,806	-5.7	43,251	41,361	-1,890	-4.4
Kiribati	1,123	1,280	157	14.0	1,344	1,369	25	1.9
Marshall Islands	1,090	1,103	13	1.2	1,533	1,541	8	0.5
New Caledonia	29,911	29,561	-350	-1.2	33,771	32,007	-1,764	-5.2
Niue	1,803	2,586	783	43.4	1,304	1,815	511	39.2
Palau	32,542	27,582	-4,960	-15.2	28,766	25,310	-3,456	-12.0
Papua New Guinea	25,271	24,914	-357	-1.4	24,285	27,503	3,218	13.3
Samoa	36,490	36,056	-434	-1.2	35,267	33,499	-1,768	-5.0
Solomon Islands	7,307	6,887	-420	-5.7	5,038	6,031	993	19.7
Tonga	14,231	14,698	467	3.3	15,619	16,229	610	3.9
Tuvalu	221	344	123	55.7	308	250	-58	-18.8
Vanuatu	34,357	34,248	-109	-0.3	28,696	28,803	107	0.4
Total	472,698	459,913	-12,785	-2.7	420,249	413,035	-7,214	-1.7

Source: NTOs, NSOs and SPTO

The third quarter saw 459,913 tourists visiting the Pacific ACPs and SPTO member countries as seen in Table R1 above. This represents a slight decline of 2.7% when compared to the same period in 2012. However despite the region's decline, Kiribati, Niue, Tonga and Tuvalu recorded strong positive growths of 14.0%, 43.4%, 55.7% and 3.3% respectively. Other countries of the region showed decreases in their numbers of tourist arrivals during the period under review.

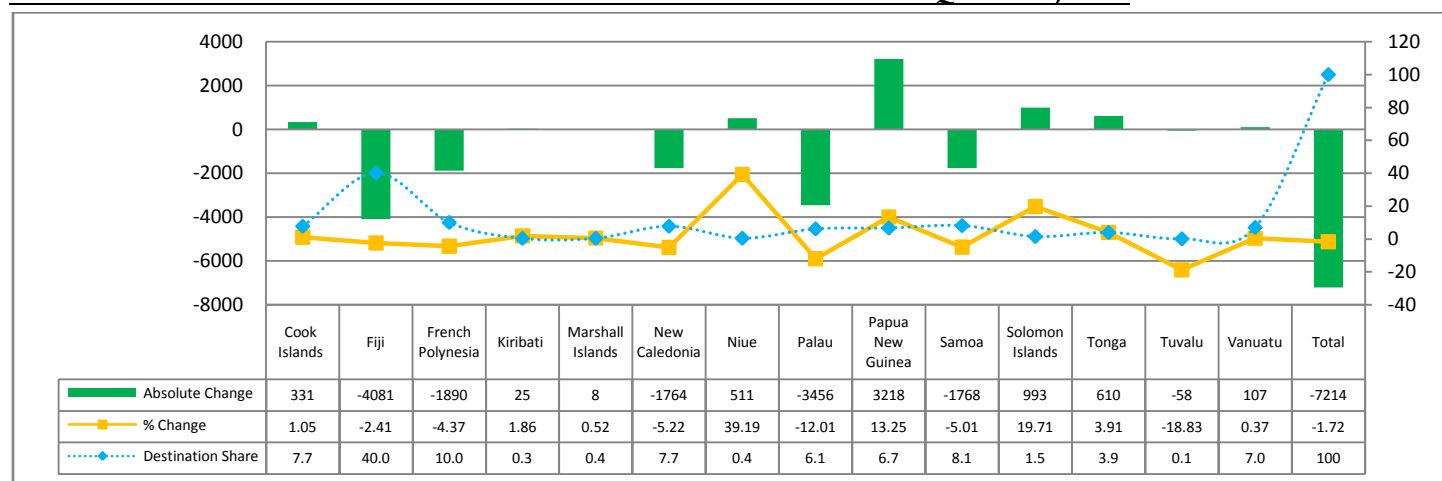
R2: Tourist arrivals into Pacific ACP and SPTO member countries in quarter 3, 2013



Source: NTOs, NSOs and SPTO

The last quarter under review saw 413,035 tourists visiting the Pacific ACPs and SPTO member countries as seen in Table R1 below. This represents a slight regional decline of 1.7% when compared to the same period in 2012. However despite the region's decline individual countries performances highlighted some strong growth. Niue, Solomon Islands and PNG recorded double digit growths of 39.2%, 19.7% and 13.3% respectively. On the downside Tuvalu and Palau recorded a much higher decline of -12.0 and -18.8% respectively. Other countries of the region performances were mixed and only showed slight changes.

R3: Tourist arrivals into Pacific ACP and SPTO member countries in Quarter 4, 2013



Source: NTOs, NSOs and SPTO

Performance by Source Market

Mixed results were recorded by source markets during the period under review. In quarter 3, 2013, New Zealand, Canada and the Other Countries category recorded positive growths of 1.5%, 0.8% and 1.8% respectively. Other source markets registered declines. In quarter 4, only Australia and Europe recorded positive growths while the other key source markets showed declines when compared to the same period in 2012.

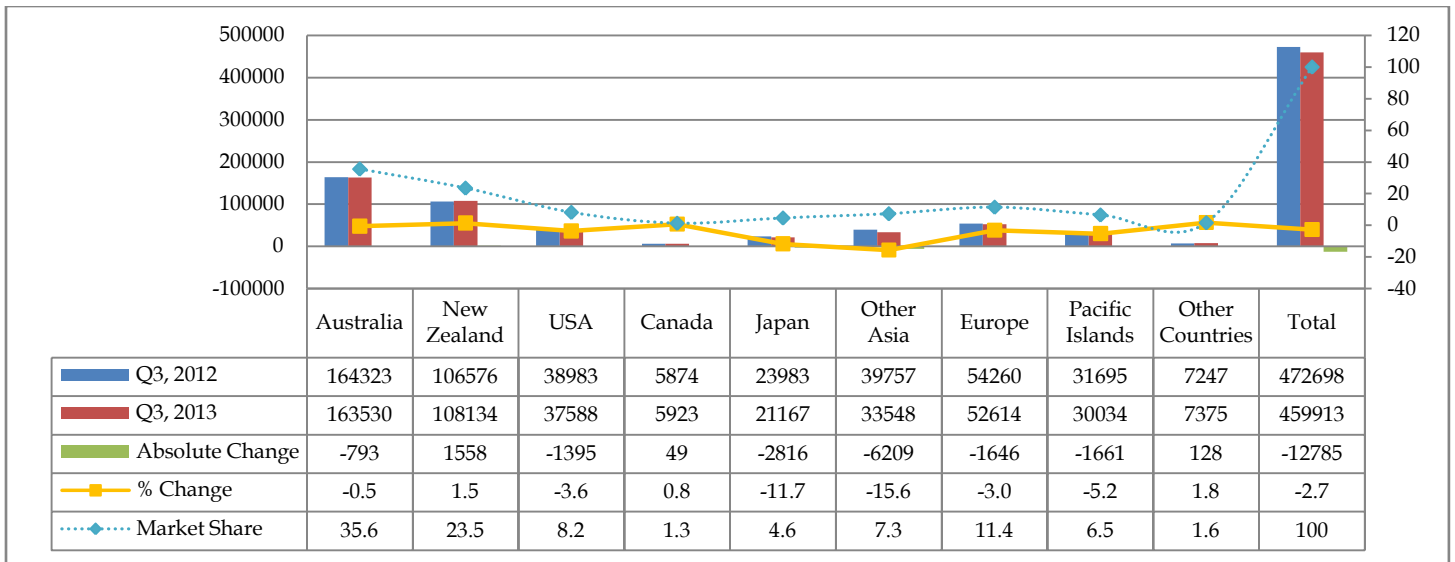
Of the markets, the Australian market dominated the region during Quarter 3 and 4 with market shares of 35.6% and 37.3% respectively. This is followed by the New Zealand market with 23.5% and 18.4% respectively for the same period. The European market is the third dominant market with 11.4% and 11.8% respectively. USA was fourth.

R4: Tourist arrivals by source market in quarter 3 and quarter 4 2013

Source Market	Q3, 2012	Q3, 2013	Absolute Change	% Change	% Market Share	Q4, 2012	Q4, 2013	Absolute Change	% change	% Market Share
Australia	164,323	163,530	-793	-0.5	35.6	150,298	154,201	3,903	2.6	37.3
New Zealand	106,576	108,134	1558	1.5	23.5	77,262	75,803	-1,459	-1.9	18.4
USA	38,983	37,588	-1395	-3.6	8.2	37,064	36,526	-538	-1.5	8.8
Canada	5,874	5,923	49	0.8	1.3	6,801	6,693	-108	-1.6	1.6
Japan	23,983	21,167	-2816	-11.7	4.6	20,799	19,533	-1,266	-6.1	4.7
Other Asia	39,757	33,548	-6209	-15.6	7.3	36,882	30,585	-6,297	-17.1	7.4
Europe	54,260	52,614	-1646	-3.0	11.4	48,373	48,536	163	0.3	11.8
Pacific Islands	31,695	30,034	-1661	-5.2	6.5	32,939	31,822	-1,117	-3.4	7.7
Other Countries	7,247	7,375	128	1.8	1.6	9,831	9,336	-495	-5.0	2.3
Total	472,698	459,913	-12,785	-2.7	100	420,249	413,035	-7,214	-1.7	100

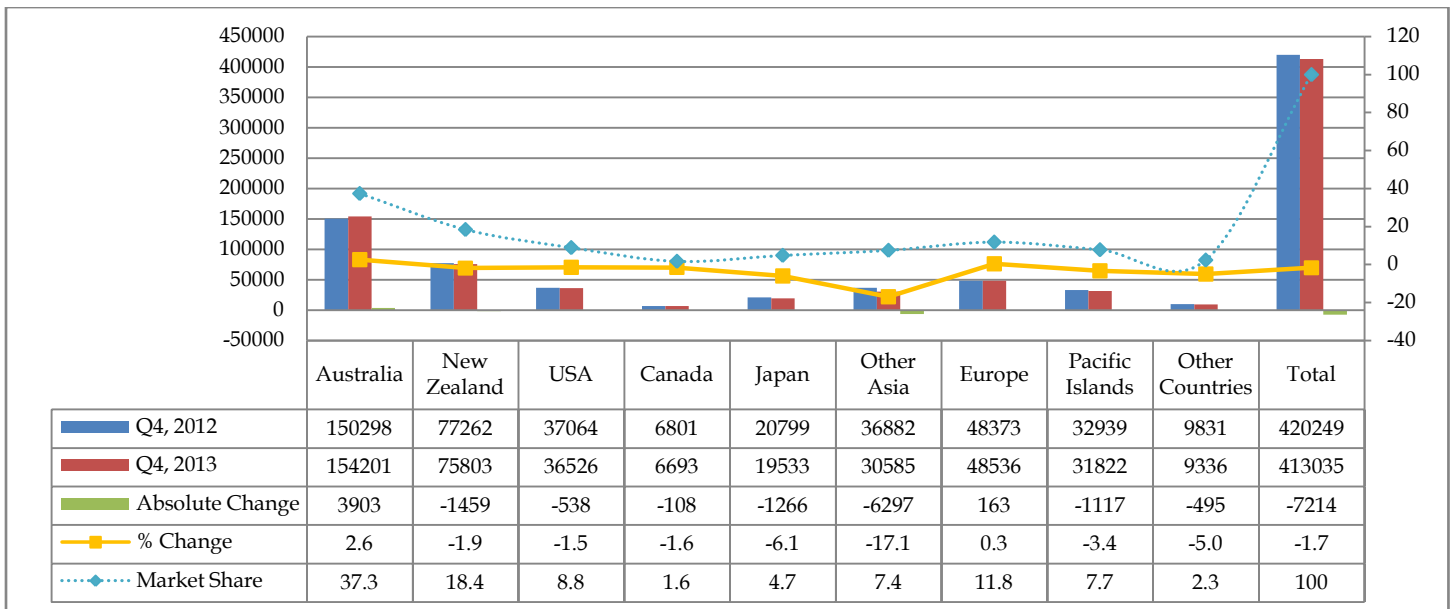
Source: NTOs, NSOs and SPTO

R5: Tourist arrivals by source market in quarter 3, 2013



Source: NTOs, NSOs and SPTO

R6: Tourist arrivals by source market in quarter 4, 2013.



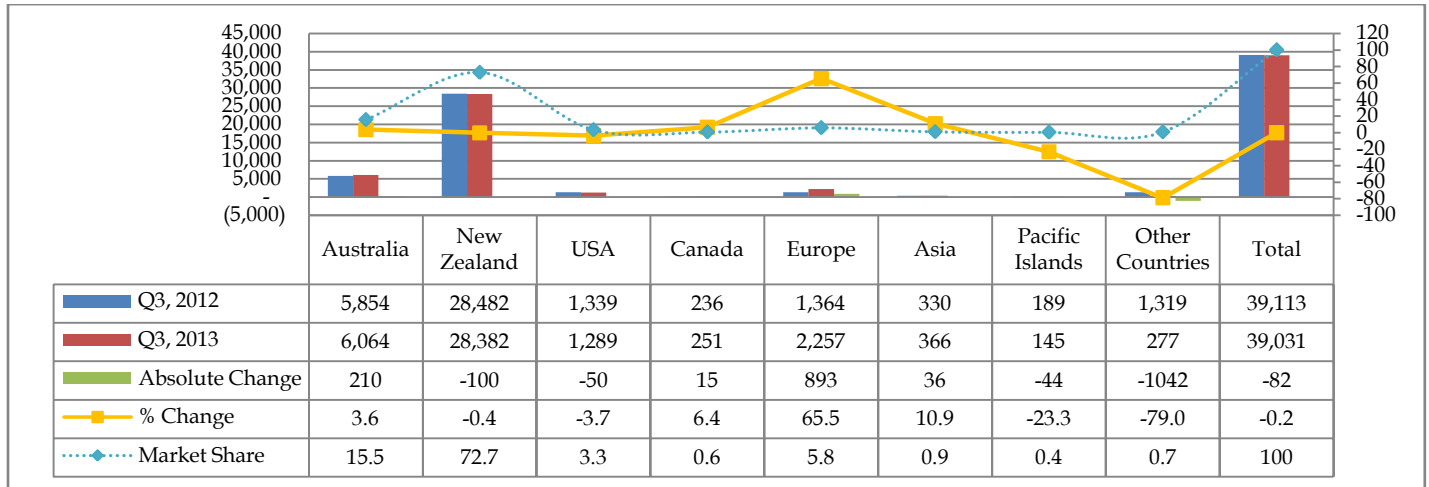
Source: NTOS, NSOs and SPTO

Performance by Destination

Cook Islands - Quarter 3, 2013

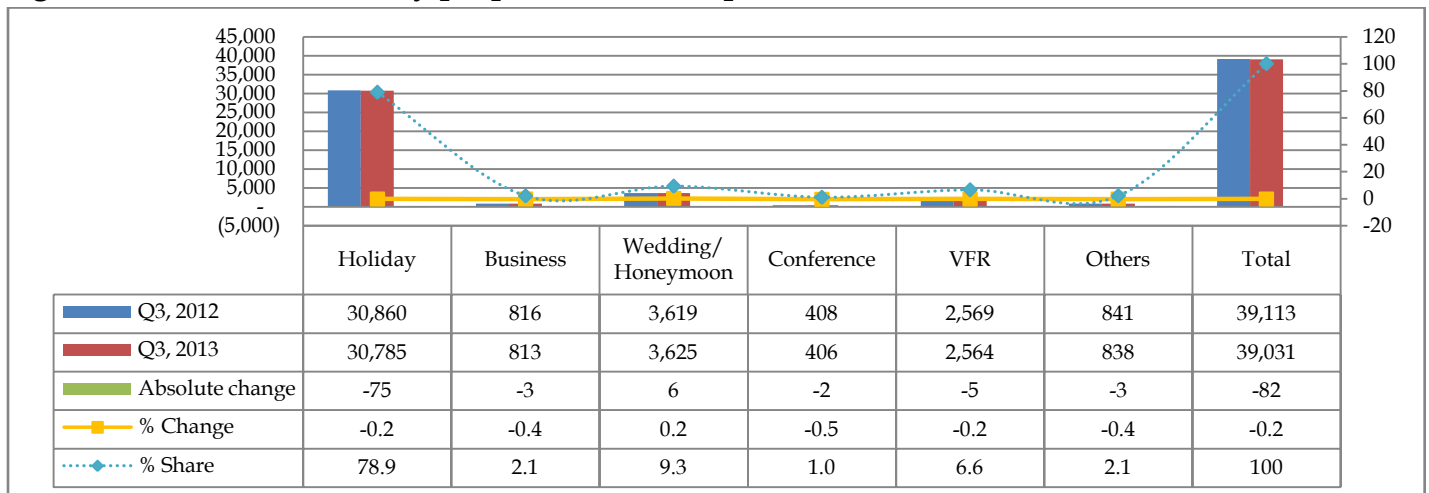
New Zealand by far is Cook Islands most important single market, providing the country with almost 73% of total tourist arrivals during the third quarter of 2013. Australia is the country's next most important market accounting for some 16% of the tourist traffic to the Cook Islands. Positive growths were recorded by Europe 65.5%, Other Asia 10.9% and Canada 6.4%. Tourist arrivals from New Zealand, USA Pacific Islands and the Other Countries category declined by 0.4%, -3.7%, -23.3%, and -79.0 % respectively.

Figure C1: Tourist arrivals by source market in quarter 3, 2013.



Source: Cook Islands NTO, NSO and SPTO

Figure C2: Tourist arrivals by purpose of visit in quarter 3, 2013



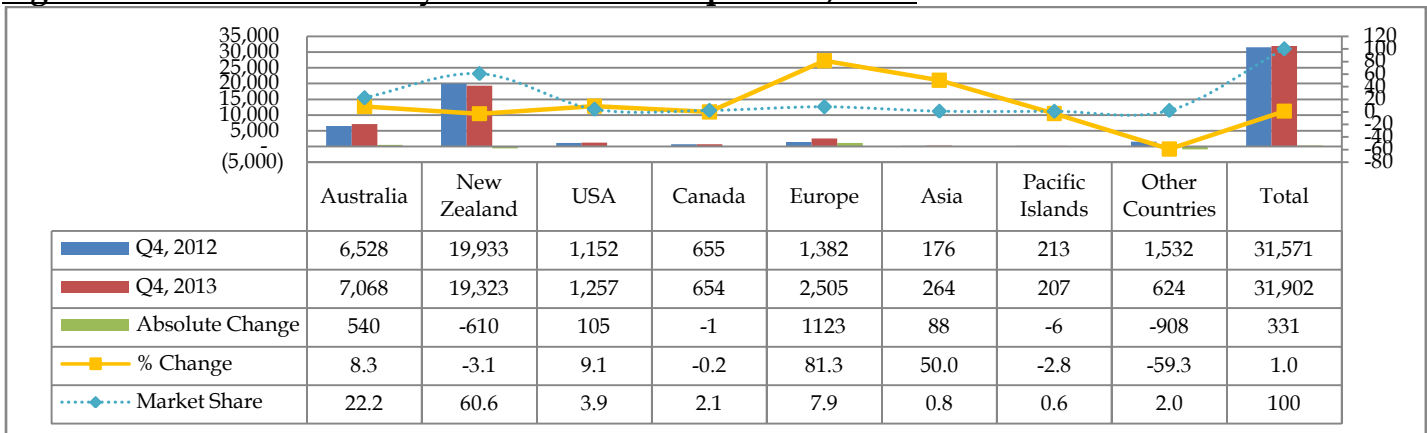
Source: Cook Islands NTO, NSO and SPTO

Holiday tourists accounted for almost 79% of the total tourist traffic into the Cook Islands during the third quarter of 2013. The remaining 21% was shared by those visiting for Business, Wedding & Honeymoon, Conference, VFR and Other purposes.

Cook Islands - Quarter 4, 2013

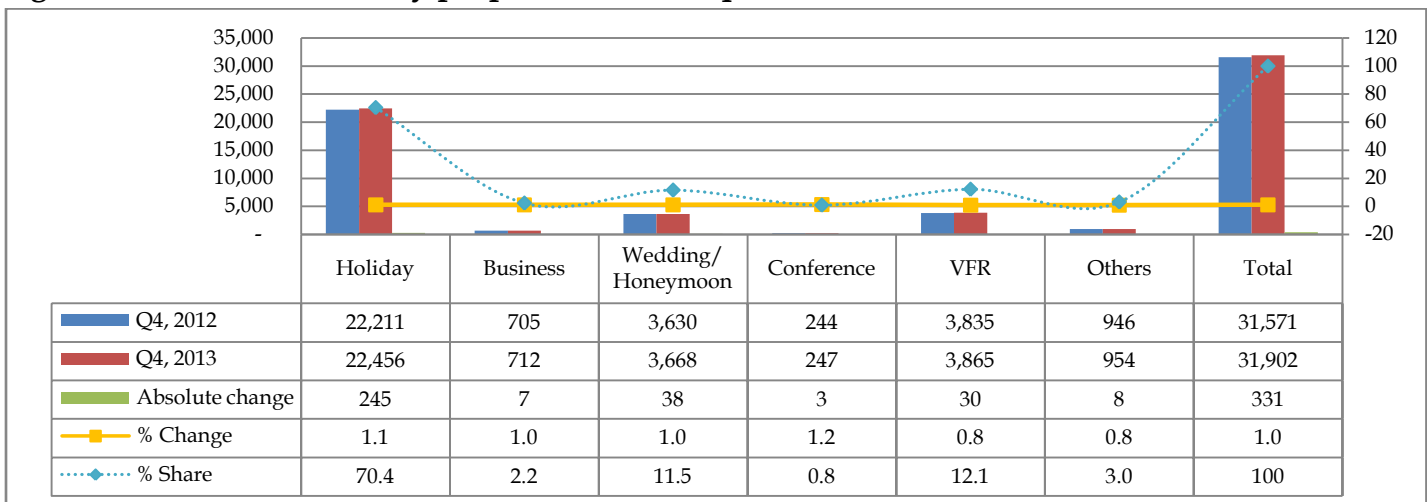
Tourist arrivals into Cook Islands recorded a positive growth of 1% in the last quarter of 2013. This increase is largely attributable to double digit growths recorded by Europe 81.3% and Other Asia 50%. Positive growths were also recorded by Australia 8.3% and USA 9.1%. Correspondingly, tourist arrivals from Cook Islands major market of New Zealand took a dip along with Canada, Pacific Islands and the classification 'Other Countries' registered declines of 3.1%, 0.2%, 2.8% and 59.3% respectively.

Figure C3: Tourist arrivals by source market in quarter 4, 2013.



Source: Cook Islands NTO, NSO and SPTO

Figure C4: Tourist arrivals by purpose of visit in quarter 4, 2013.



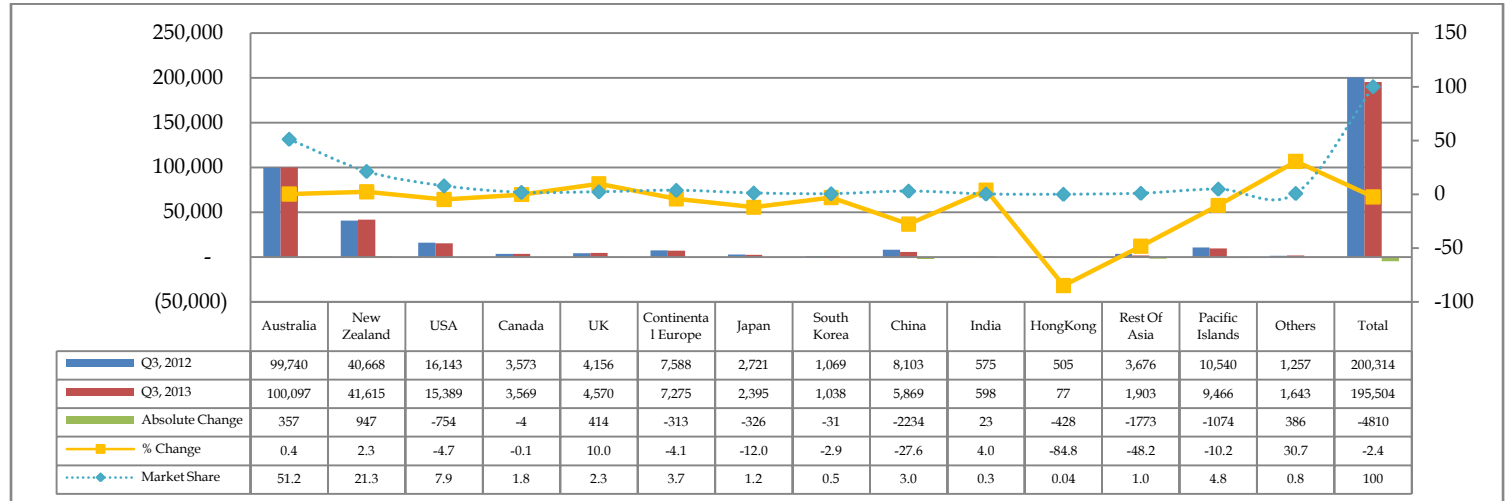
Source: Cook Islands NTO, NSO and SPTO

Analysis by purpose of visit in Quarter 4 of 2013 indicates the majority 70.4% of the tourists were on Holiday whilst Wedding & Honeymoon accounted for a further 11.5% and VFR 12.1%.

Fiji – Quarter 3, 2013

Tourist numbers into Fiji during the third quarter of 2013, declined overall by 2.4% over the same period in 2012. However, positive increases were recorded by the two main key markets of Australia 0.4% and New Zealand 2.3% during the third quarter of 2013.

Figure C5: Tourist arrivals by source market in quarter 3, 2013.



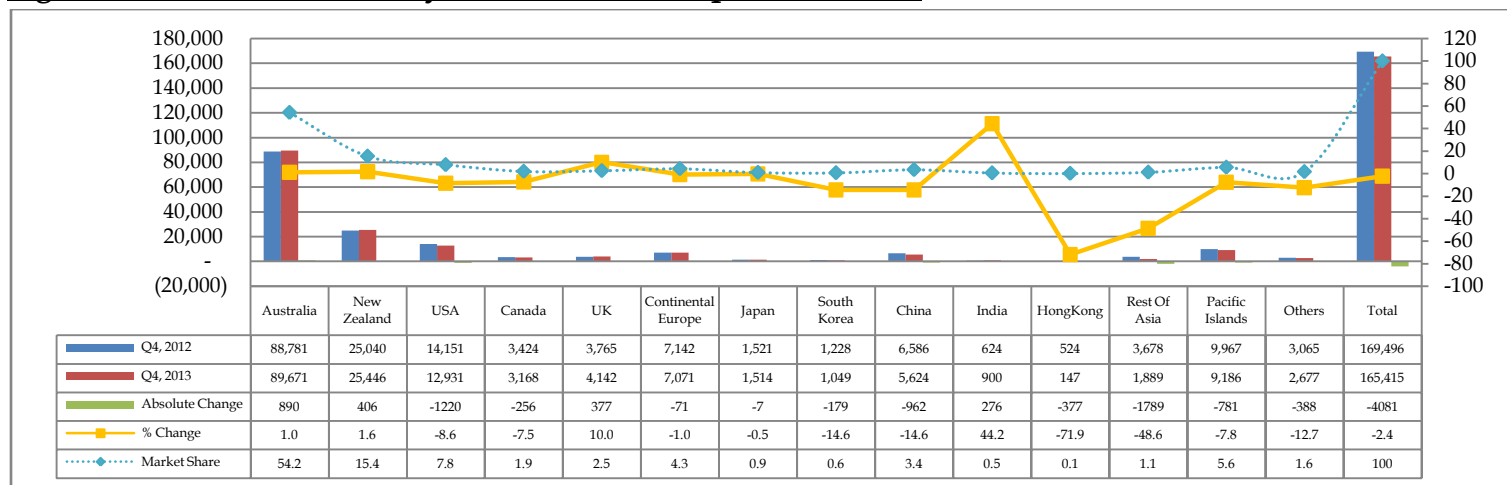
Source: Fiji NSO and SPTO

Note: Figures by purpose of visit are not available.

Fiji – Quarter 4, 2013

Following the same trend as in quarter 3, 2013, overall tourist arrivals into Fiji declined by 2.4% or by 4,810 in absolute terms. This decrease was attributable to the under-performing of all Fiji's tourist's markets with the exception of Australia New Zealand, UK and India that registered positive growth.

Figure C6: Tourist arrivals by source market in quarter 4, 2013.



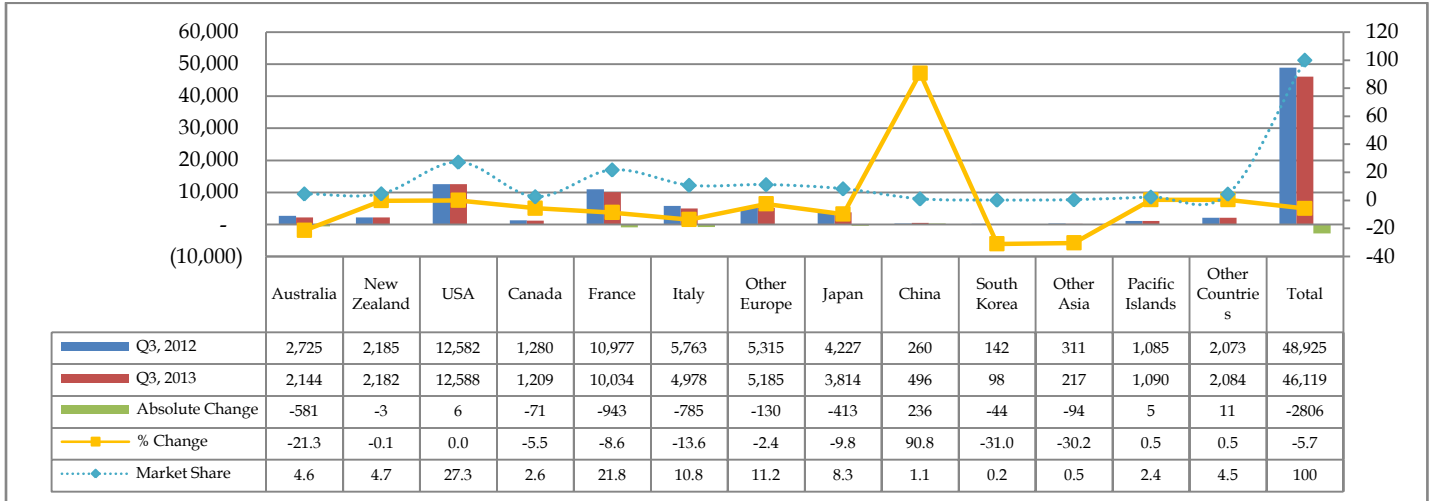
Source: Fiji NSO and SPTO

Note: Figures by purpose of visit are not available.

French Polynesia – Quarter 3, 2013

French Polynesia's tourist arrivals during Quarter 3, was dominated by tourists from USA (27.3%) and France (21.8%). Together they accounted for almost half (49.1%) of the tourist traffic during the third quarter of 2013. The classification, "Other Europe" ranked third with 11.2% followed by Italy (10.8%). Others accounted for the remaining, 28.9%.

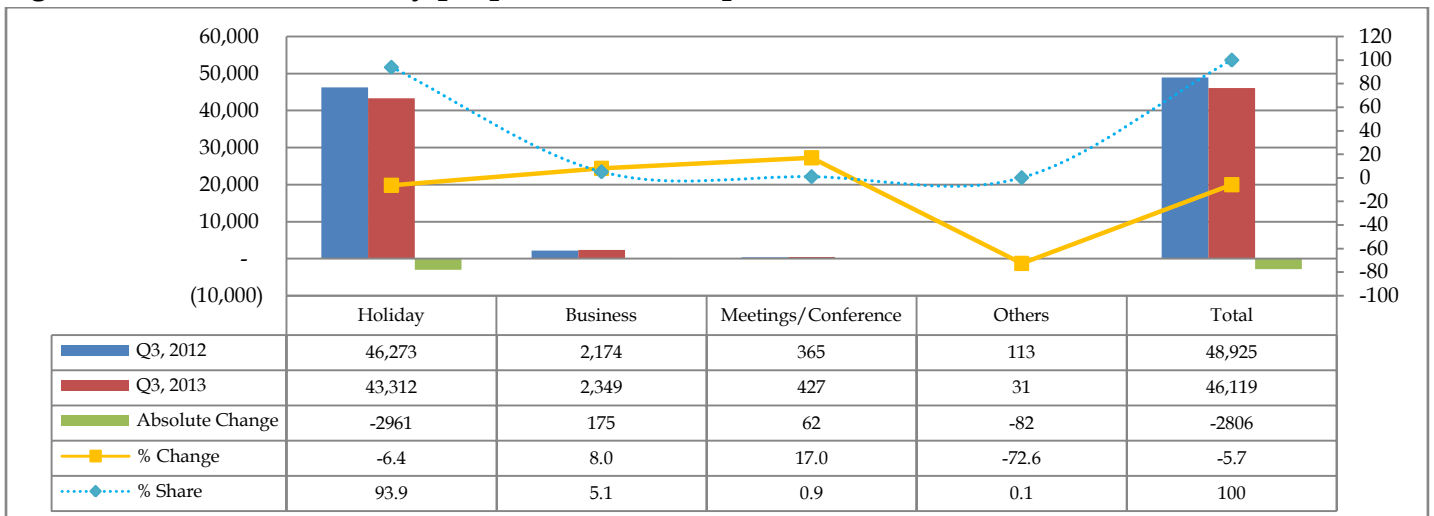
Figure C7: Tourist arrivals by source market in quarter 3, 2013.



Source: French Polynesia NSO and SPTO

Analysis by purpose of visit revealed that almost 94% of the tourist traffic were visiting the country for Holiday and the remaining 6% for Business, Meetings/Conference and Others.

Figure C8: Tourist arrivals by purpose of visit in quarter 3, 2013.

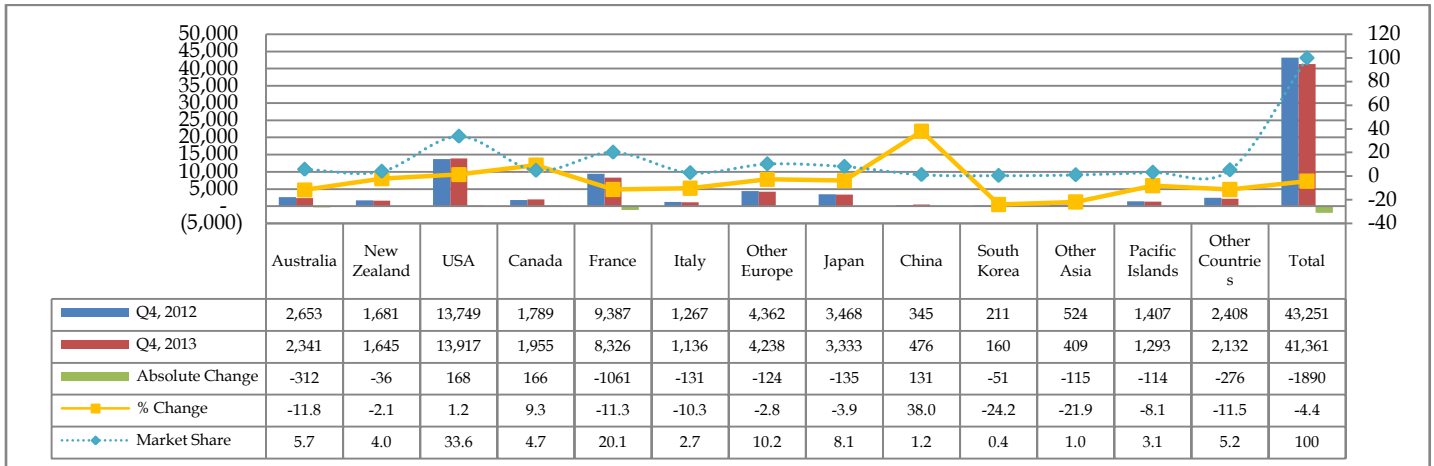


Source: French Polynesia NSO and SPTO

French Polynesia - Quarter 4, 2013

During Quarter 4 of 2013, tourist arrivals into French Polynesia declined by 4.4% when compared to the same quarter of the previous year. These declines were recorded for most markets except USA, Canada and China registering positive increases of 1.2%, 9.3% and 38.0% respectively.

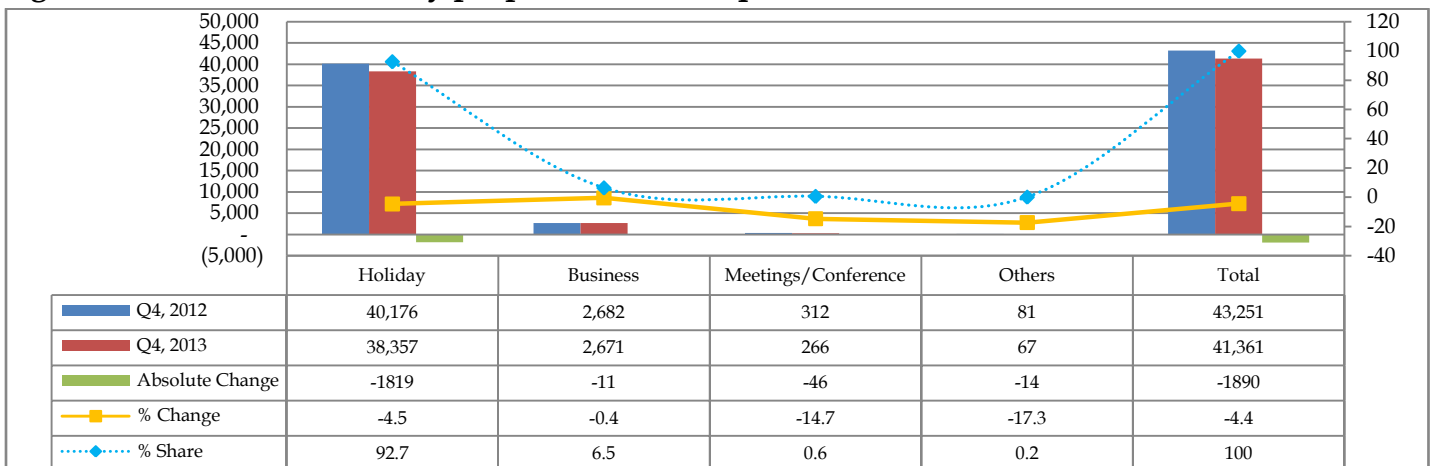
Figure C9: Tourist arrivals by source market in quarter 4, 2013.



Source: French Polynesia NSO and SPTO

By purpose of visit, the holidaying segment accounted for some 93% while business tourists represented a further 6.5%. Other classifications represented small numbers as indicated in the table below (Figure C10).

Figure C10: Tourist arrivals by purpose of visit in quarter 4, 2013.

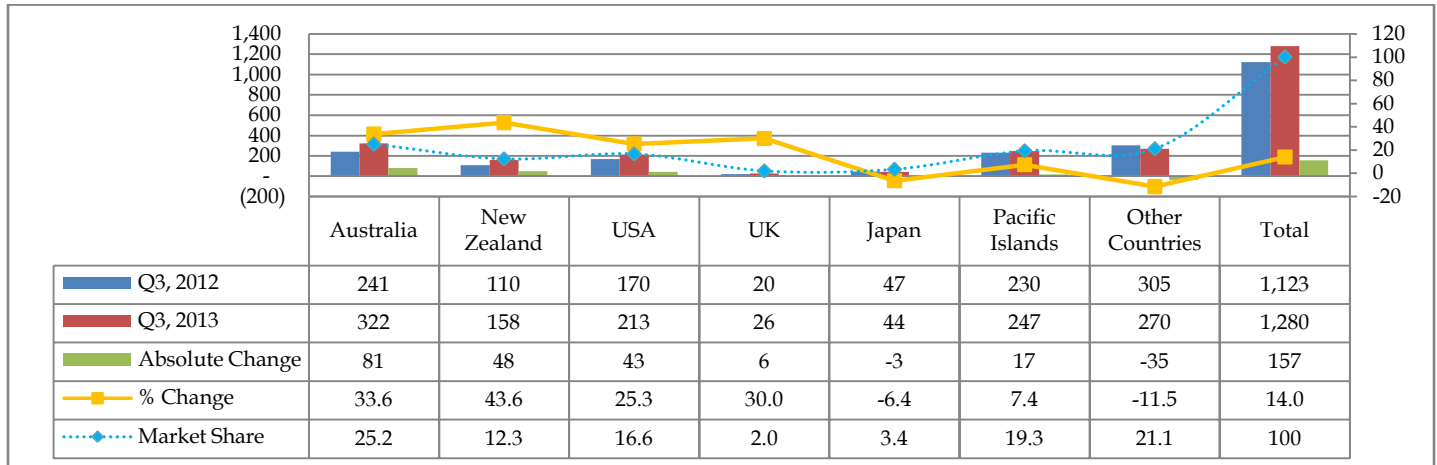


Source: French Polynesia NSO and SPTO

Kiribati – Quarter 3, 2013

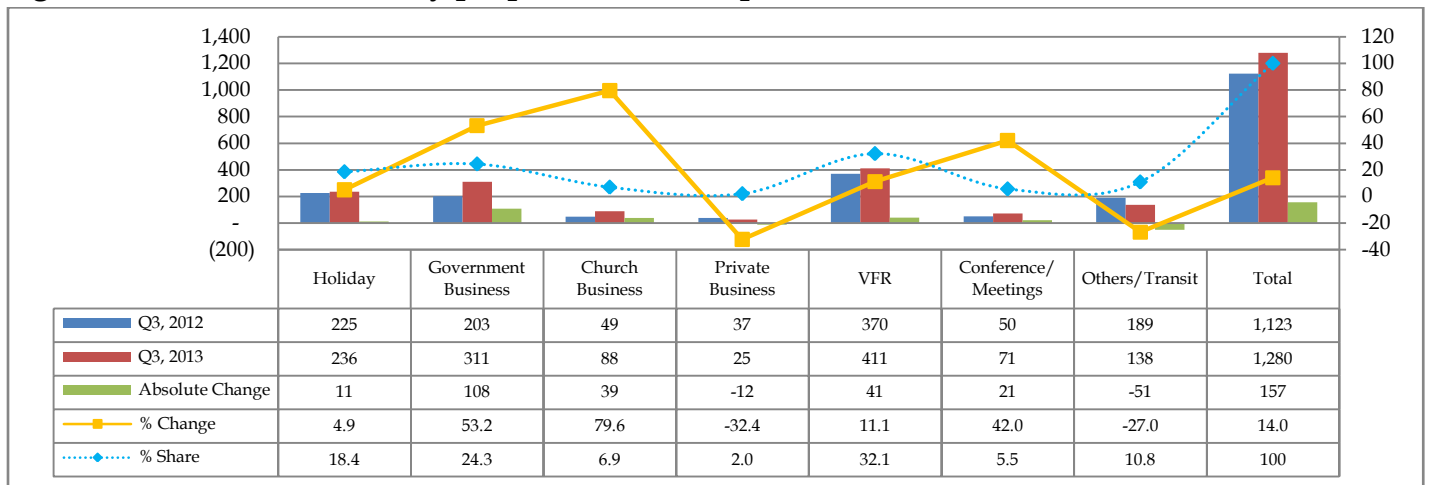
This member country received a total of 1,280 tourist arrivals during the third quarter of 2013, representing an increase of 14% over the same period the previous year. While most markets registered increases in arrivals during the quarter under review, Japan and the classification 'Other Countries' recorded decreases as shown in C11 below. By market share, Australia accounted for 25.2% followed by Pacific Islands (19.3%) and USA (16.6%) – others comprised the remaining market shares. New Zealand accounted for 12.3% share of the total arrivals followed by Japan (3.4%).

Figure C11: Tourist arrivals by source market in quarter 3, 2013.



Source: Kiribati NTO and SPTO

Figure C12: Tourist arrivals by purpose of visit in quarter 3, 2013.



Source: Kiribati NTO and SPTO

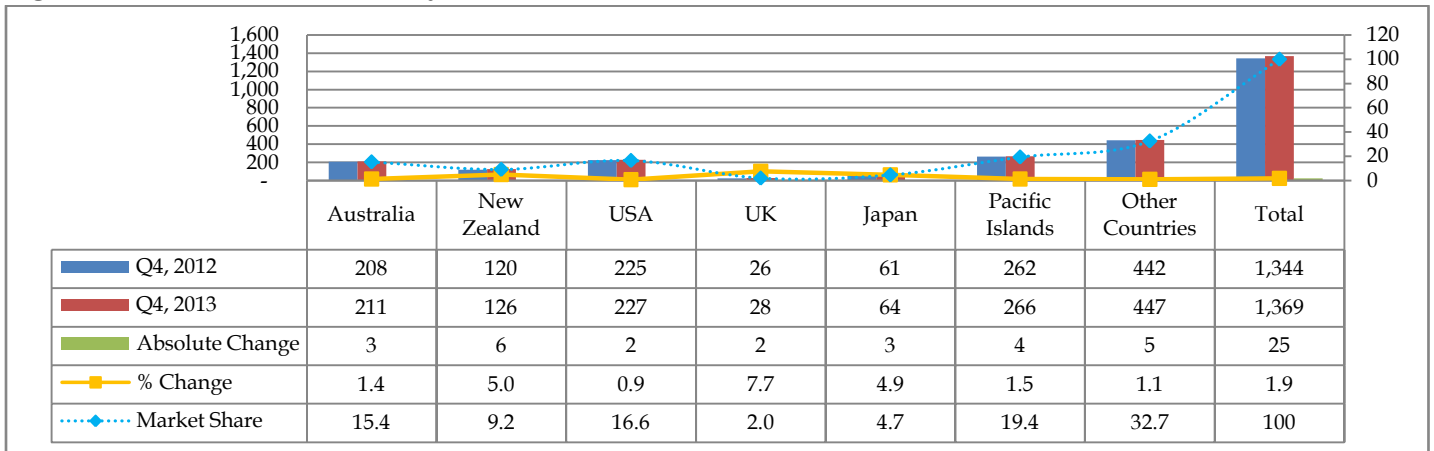
Analysis by purpose of visit revealed the classification VFR (Visiting Friends and Relatives) was popular with a share of 32.1%, followed by Government Business. As shown in Figure C12 above, leisure tourists only accounted for 18.4%.

Kiribati – Quarter 4, 2013

Tourist arrivals during Quarter 4 of 2013 represented an increase of 1.9% over the same period in the previous year. As shown in Figure C13 below, all markets indicated positive growths.

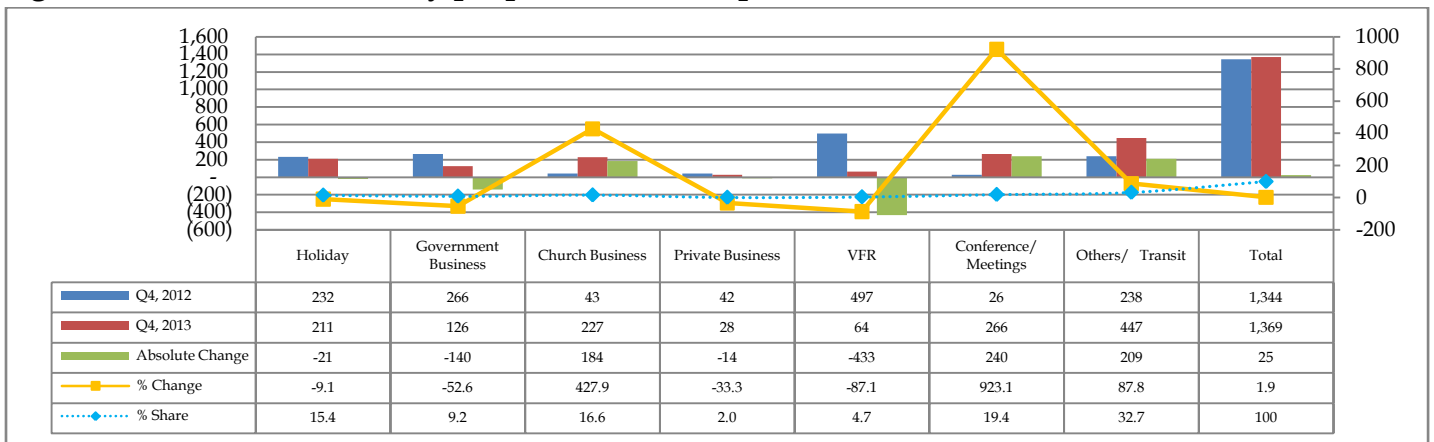
Analysis by market share revealed that the classification, “Other Countries” dominated with 32.7%, followed by visitors from the Pacific Islands with a share of 19.4%, USA 16.6%, and Australia 15.4% and New Zealand 9.2%. Other markets took the remaining 4.7% share.

Figure C13: Tourist arrivals by source market in quarter 4, 2013.



Source: Kiribati NTO and SPTO

Figure C14: Tourist arrivals by purpose of visit in quarter 4, 2013.



Source: Kiribati NTO and SPTO

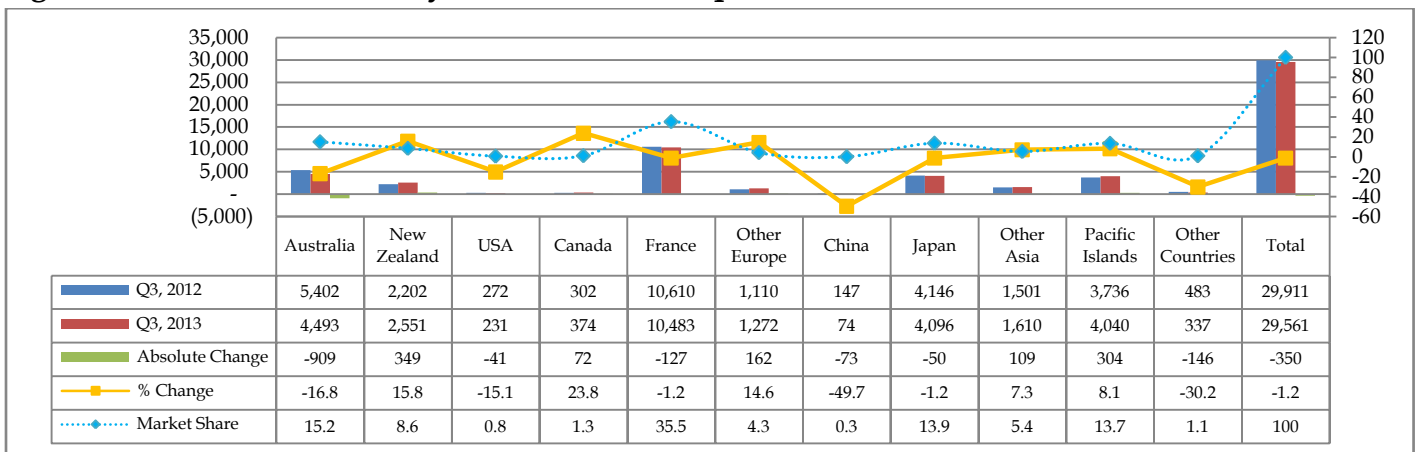
Marshall Islands -No data available.

New Caledonia – Quarter 3, 2013

In Quarter 3 of 2013, New Caledonia received 29,561 tourists, representing a slight decline by 1.2% (or 350 in absolute numbers) as compared to the numbers that arrived in the same quarter of the previous year. Disappointingly, all New Caledonia’s major markets took nosedives during this quarter, as shown below in Figure C15, except for New Zealand, Canada, Other Europe, Other Asia and Pacific Islands that registered positive growths.

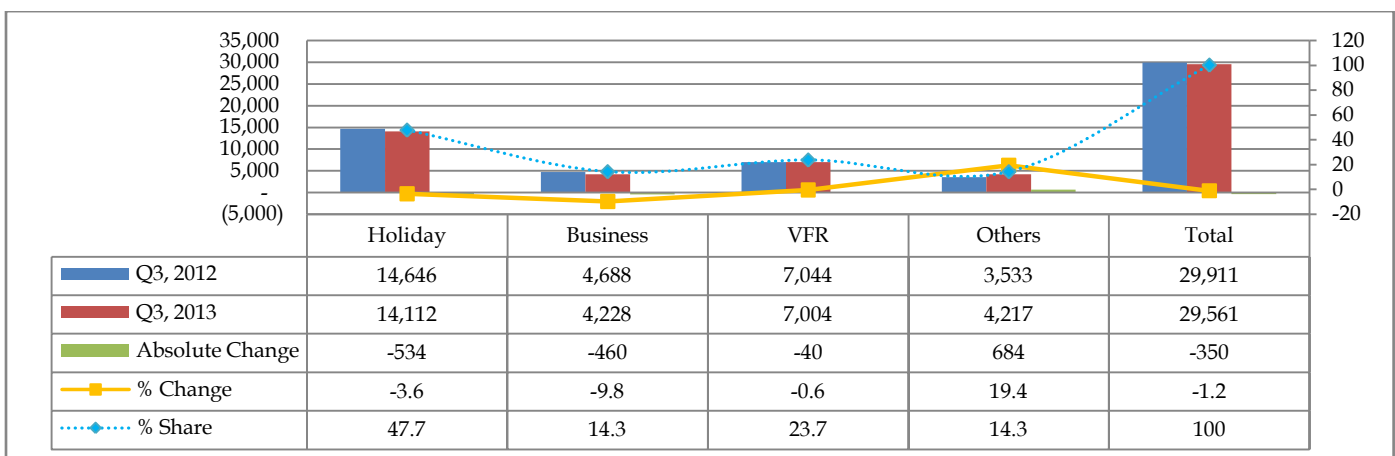
Analysis by markets revealed that France maintains its position as the dominant market for New Caledonia with a market share of 35.5%. Tourist traffic from Australia accounted for 15.2%, Japan 13.9%, and Pacific Islands 13.7%

Figure C15: Tourist arrivals by source market in quarter 3, 2013.



Source: New Caledonia NSO and SPTO

Figure C16: tourist arrivals by purpose of visit in quarter 3, 2013.



Source: New Caledonia NSO and SPTO

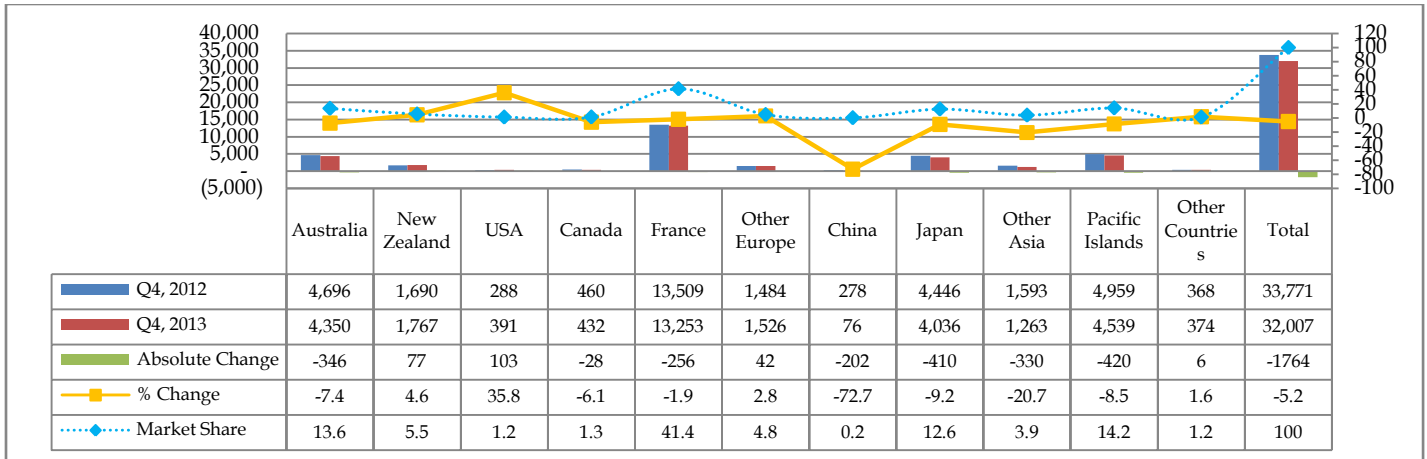
The holiday component of the purpose of visit accounted for nearly half (47.7%) of the tourist traffic to this island destination. Business represented 14.3%, VFR 23.7% and others 14.3%. All purposes of

visit classifications recorded declines as shown in C16 above, while only the classification 'Others' showed an increase of 19.4%.

New Caledonia- Quarter 4, 2013

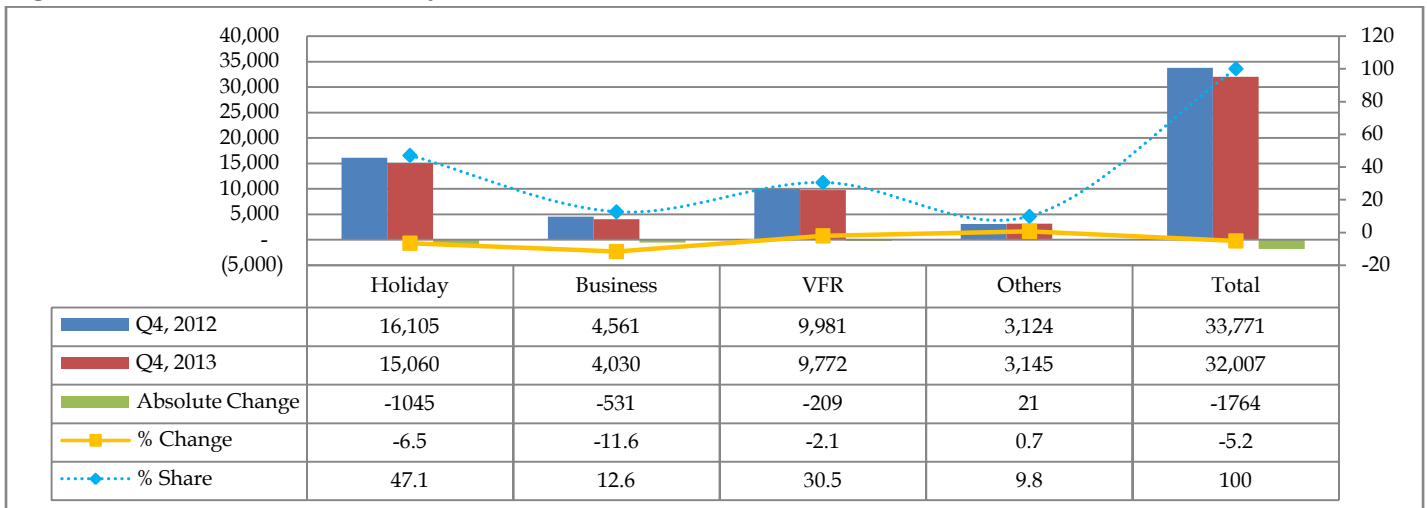
In Quarter 4, the decline seemed to deepen by registering a further decline, but this time, by 5.2%. Analysis by market, as shown in Figure C17 below, indicated mixed results. Whilst markets of Australia, Canada, France, China, Japan, Other Asia and Pacific Islands indicated negative growths, as shown in Figure C17 below, . New Zealand, USA, Other Europe and the classification, 'Other Countries' performed well by positive growths of 5.5%, 1.2%, 2.8% and 1.6% respectively.

Figure C17: Tourist arrivals by source market in quarter 4, 2013.



Source: New Caledonia NSO and SPTO

Figure C18: Tourist arrivals by purpose of visit in quarter 4, 2013.



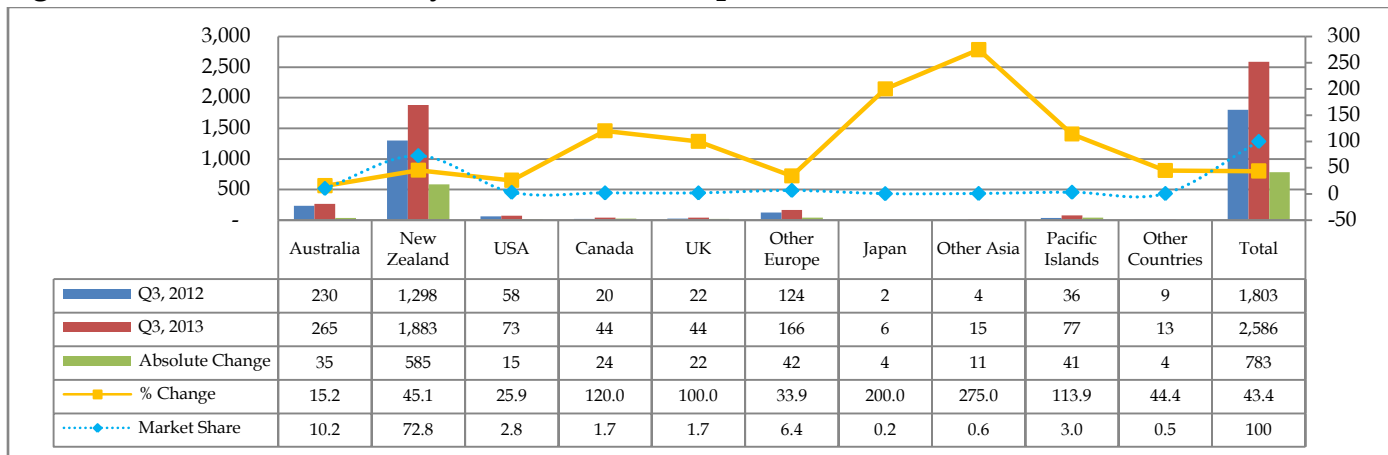
Source: New Caledonia NSO and SPTO

Analysis by purpose of visit, the Holiday component was the popular visitors to this destination with a share of 47.1% and VFR followed with a 30.5% share. Business visitors accounted for 12.6% whilst 'others' category took the remaining 9.8% in the last quarter of 2013.

Niue - Quarter 3, 2013

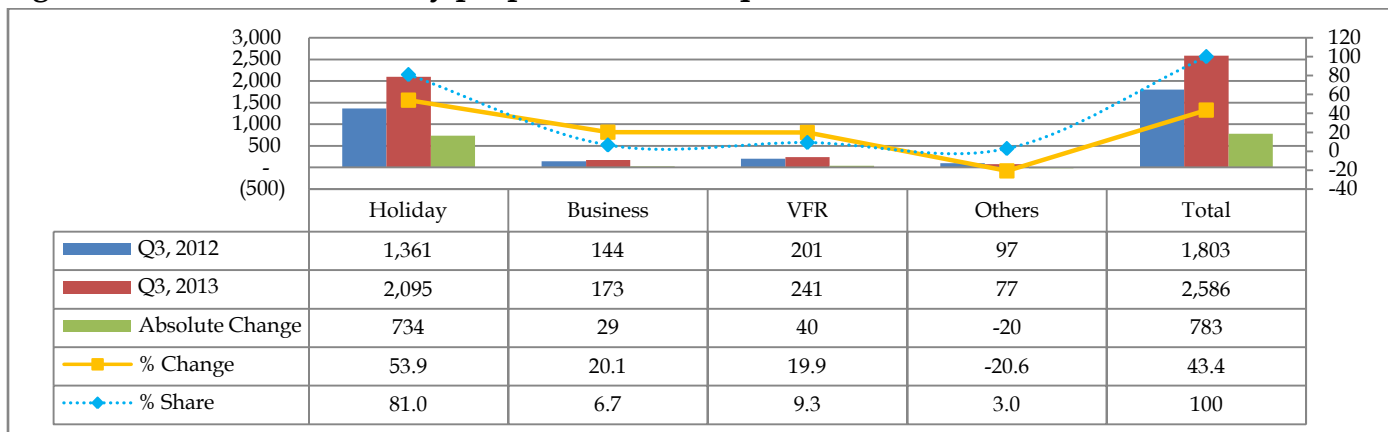
During the third Quarter of 2013, Niue received 2,586 tourists, representing an increase of 43.4% (or 783 in absolute terms). As shown in Figure C19, all markets performed well resulting in a sizeable national increase. Of these, New Zealand, understandably, provided Niue with the bulk (72.8%) of its total tourist traffic followed by Australia (10.2%) and Europe (8.1%).

Figure C19: Tourist arrivals by source market in quarter 3, 2013.



Source: Niue NSO and SPTO

Figure C20: Tourist arrivals by purpose of visit in quarter 3, 2013.

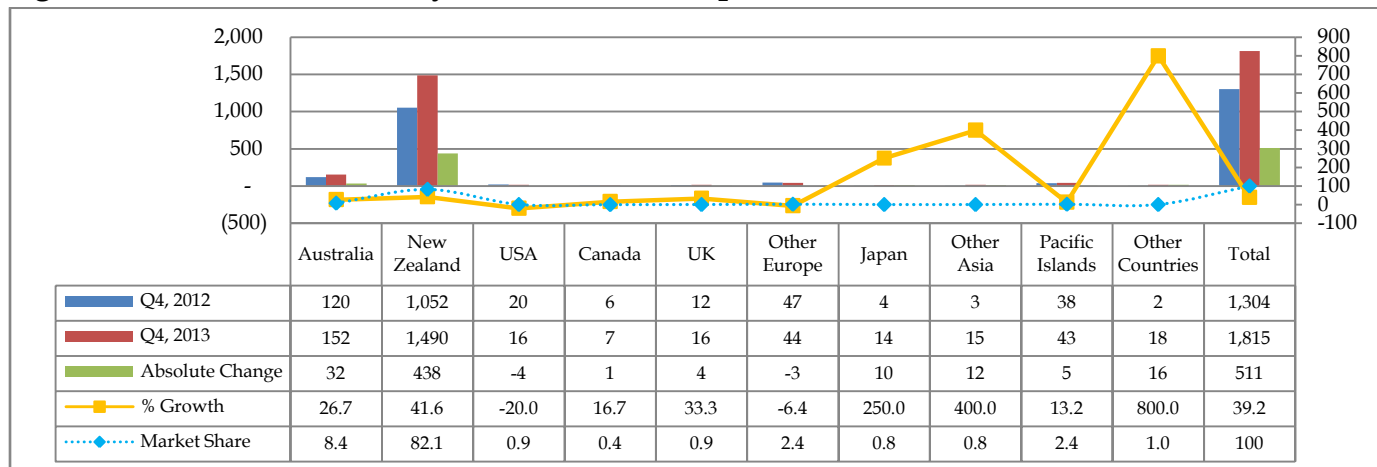


Source: Niue NSO and SPTO

Of the purpose of visit, the holiday segment accounted for 81% of Niue's tourist traffic during third quarter under review, with business representing 6.7%, VFR, 9.3% and others 3.0%. In terms of percentage change, all purposes of visits showed positive growth except the classification 'others' that took a nosedive during the quarter under review.

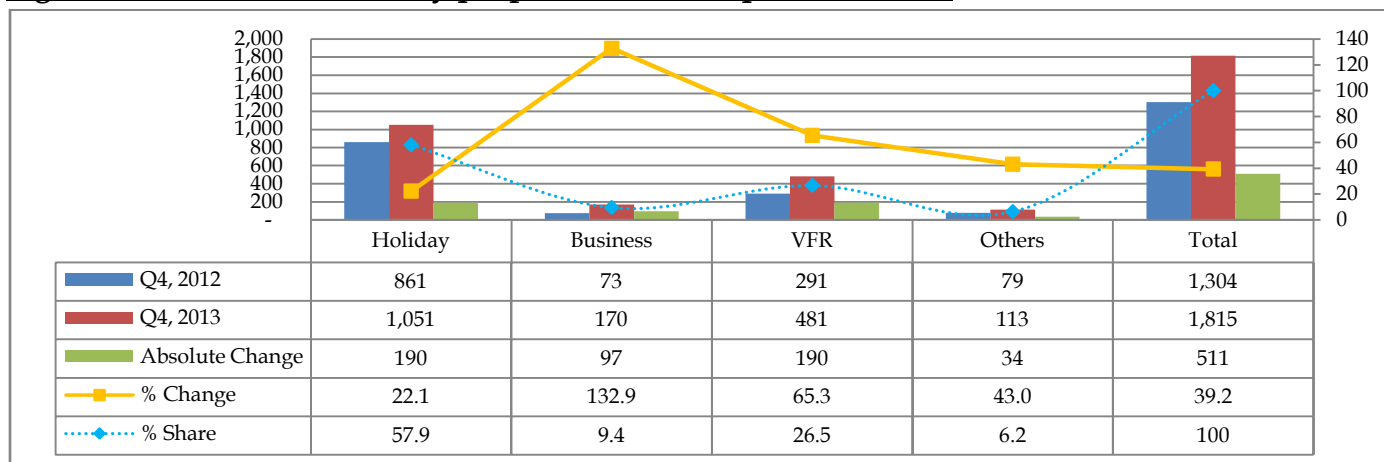
During Quarter 4, again Niue's performance recorded a double digit positive growth of 39.2% when compared to the same quarter of the previous year. Almost all source markets recorded positive growths except for USA and Other Europe which declined by 20.0% and 6.4% respectively. By market share, the New Zealand market accounted for 82.1% followed at a distance by Australia (8.4%) with all other countries put together accounted for the remaining 9.5%.

Figure C21: Tourist arrivals by source market in quarter 4, 2013.



Source: Niue NSO and SPTO

Figure C22: Tourist arrivals by purpose of visit in quarter 4, 2013.



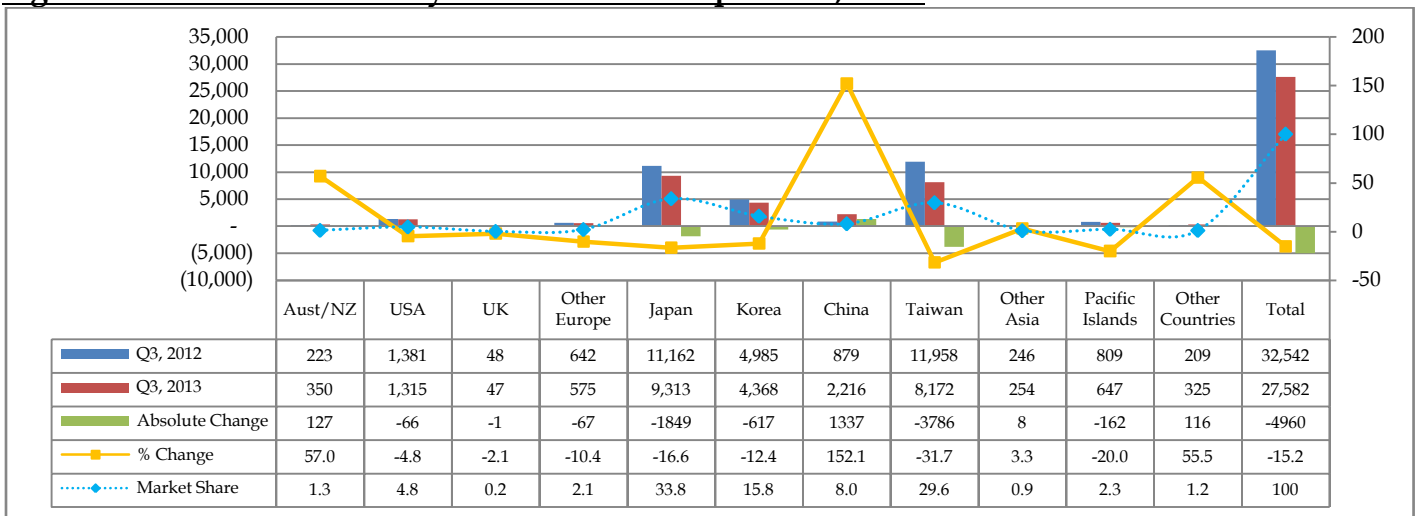
Source: Niue NSO and SPTO

Analysis by purpose of visit, revealed that of the tourist traffic to Niue during this Quarter 4, 2013 the holidaying tourists amounted to about 60% while VFR represented 26.5% of the tourist traffic into Niue during the last quarter of 2013. The remaining 15.6% was represented by Business (9.4%) and those visiting for other reasons (6.2%).

Total tourist traffic to Palau amounted to 27,582, representing a 15.2% decline when compared to the same quarter the previous year. This is attributable to the markets of “Other Asia” which saw a drop by 4,395 (or 25.6% in relative terms). Besides suffering losses in the “Other Asia” market, USA, UK, Other Europe, Japan and Pacific Islands also experienced decreases as shown below in Figure C23.

The country’s tourist traffic was dominated by arrivals from Asia (Japan, South Korea, China and Taiwan), accounting for 88.1% during quarter 3 of 2013. Japan and Taiwan are Palau’s most important markets contributing a share of 33.8% and 29.6% respectively. The US and European markets accounted for 4.8% and 2.1% respectively.

Figure C23: Tourist arrivals by source market in quarter 3, 2013.



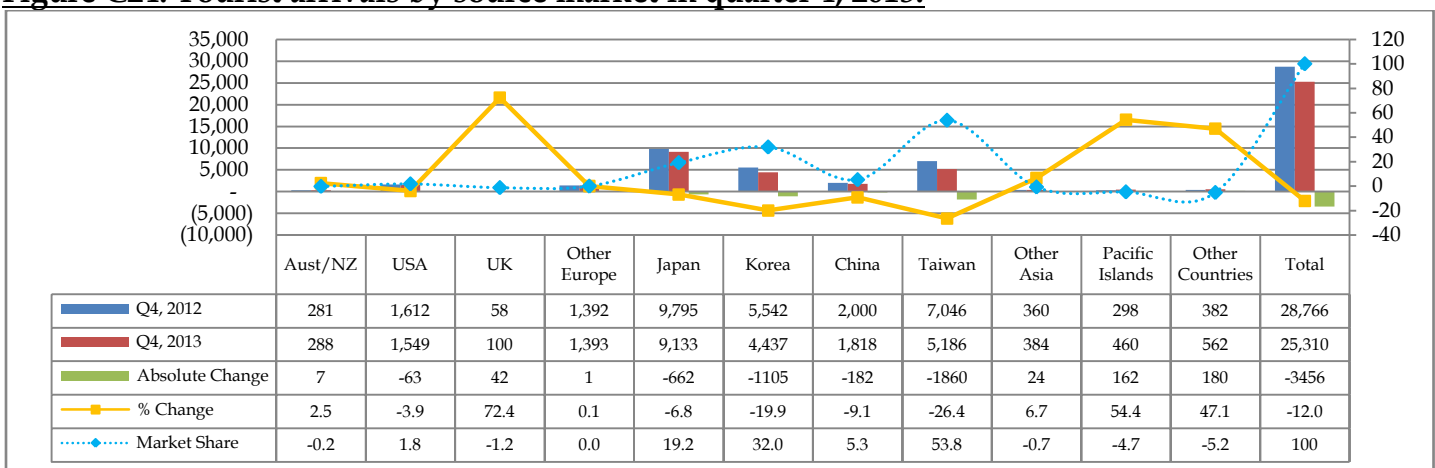
Source: Palau NTO and SPTO

Note: Figures by purpose of visit are not available.

Palau - Quarter 4, 2013

The depressing performance in Quarter 3, has continued into Quarter 4 recording a 12% decline (or 3,456 in absolute terms). This quarter also saw Palau’s main markets of ‘Other Asia’, Japan and China suffering sizeable number term losses as shown below in Figure C24. The good performance in markets such as New Zealand, UK, Other Europe, Pacific Islands and the Other Countries were not sufficient to offset the relative negative growth.

Figure C24: Tourist arrivals by source market in quarter 4, 2013.



Source: Palau NTO and SPTO

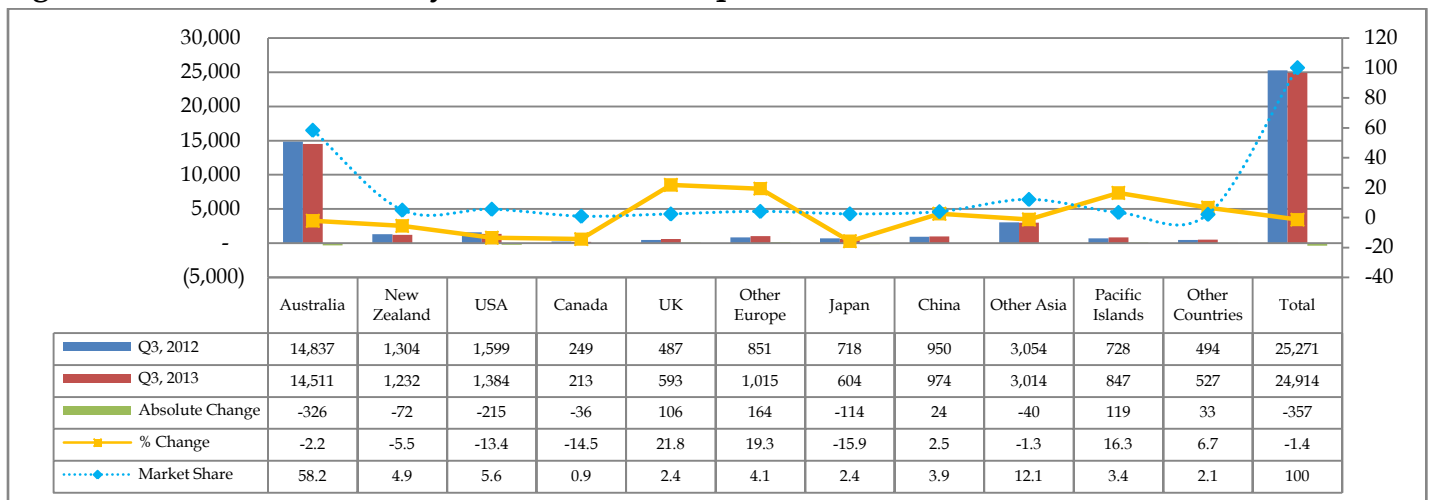
Note: Data on Purpose of Visit are unavailable.

Papua New Guinea - Quarter 3, 2013

This quarter's performance registered a slight decline of 1.4% (or 357 in absolute terms) as compared to the same quarter last year, details of which are shown in C25 below. Analysis by market showed mixed results, Figure C25 shown below revealed these with markets of UK, Other Europe, Pacific Islands and the classification 'Other Countries' with positive growths whilst correspondingly Australia, New Zealand, USA, Canada, Japan and 'Other Asia' declined with relative rates shown in the table below.

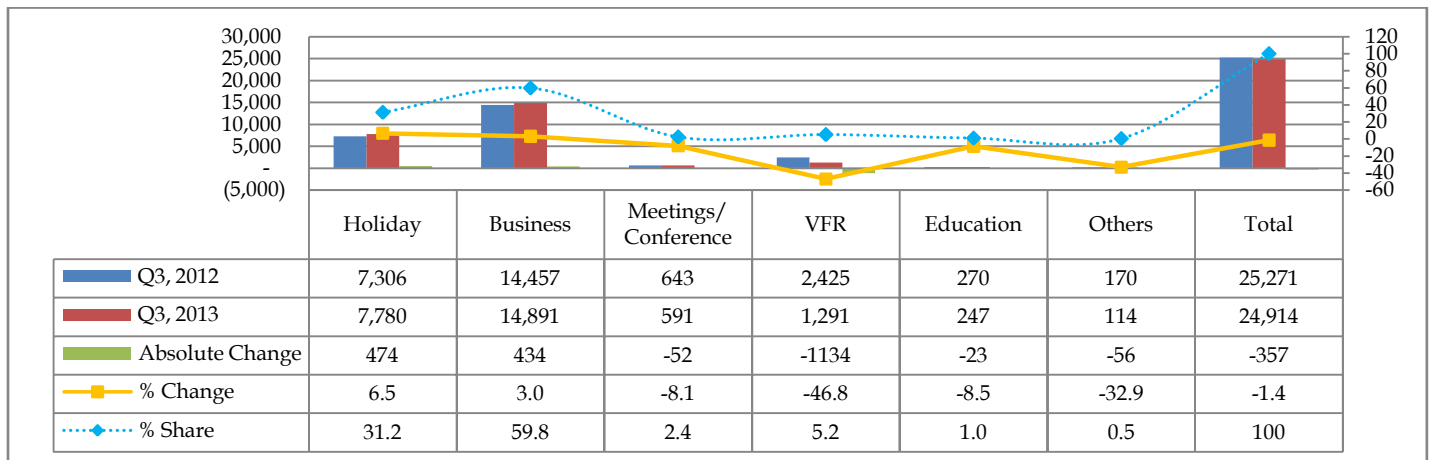
Understandably, Australia accounted for the majority (58.2%) of the tourist traffic to Papua New Guinea. The classification, 'Other Asia' ranked second with 12.1% share. USA, New Zealand and Europe accounted for 14.6% of the total tourist traffic to the country. Other markets accounted for the remaining 15.1%.

Figure C25: Tourist arrivals by source market in quarter 3, 2013.



Source: PNG NTO and SPTO

Figure C26: Tourist arrivals by purpose of visit in quarter 3, 2013.



Source: PNG NTO and SPTO

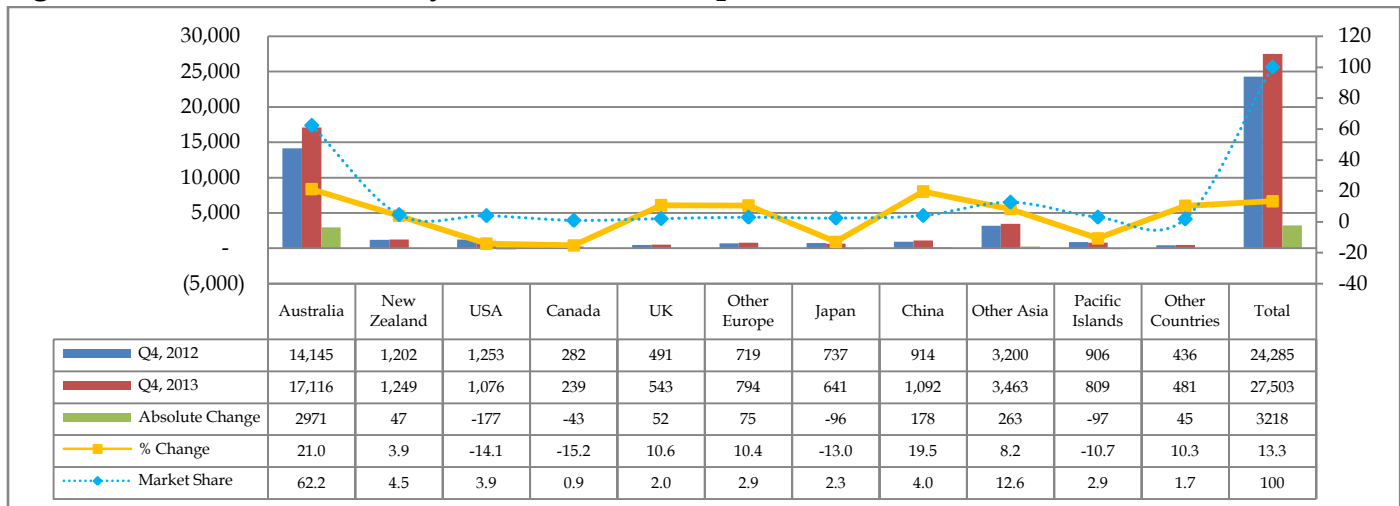
Of the total tourist traffic to Papua New Guinea, almost sixty percent (59.8%) were business visitors. The holiday segment only accounted for 31.2%. VFR represented 5.2% with Meetings and Conference, 2.4% and others 0.5%. In terms of growth, during this quarter the VFR segment took a nosedive by 46.8% while the holiday/leisure component registered an increase of 6.5%. Meetings & Conference

dropped by 8.1%. Other components recorded small changes in number terms but with large corresponding percentages.

Papua New Guinea – Quarter 4

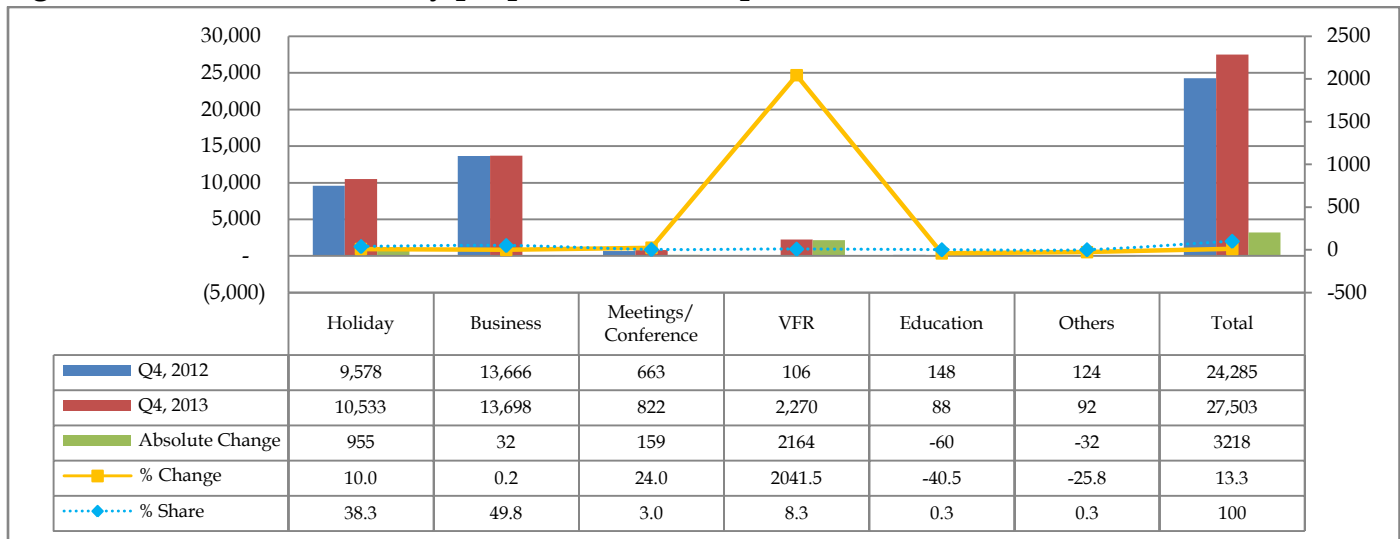
While Quarter 3 showed depressing performance, it bounced back in Quarter 4 and registered a positive growth of 13.3% when compared to the same period in 2012. This promising growth was contributed by Australia, New Zealand, UK, Other Europe, China and the Other Countries category with relative growths shown in Figure C27 below. However, the markets of USA, Canada, Japan and the Pacific Islands showed declines.

Figure C27: Tourist arrivals by source market in quarter 4, 2013.



Source: PNG NTO and SPTO

Figure C28: Tourist arrivals by purpose of visit in quarter 4, 2013.



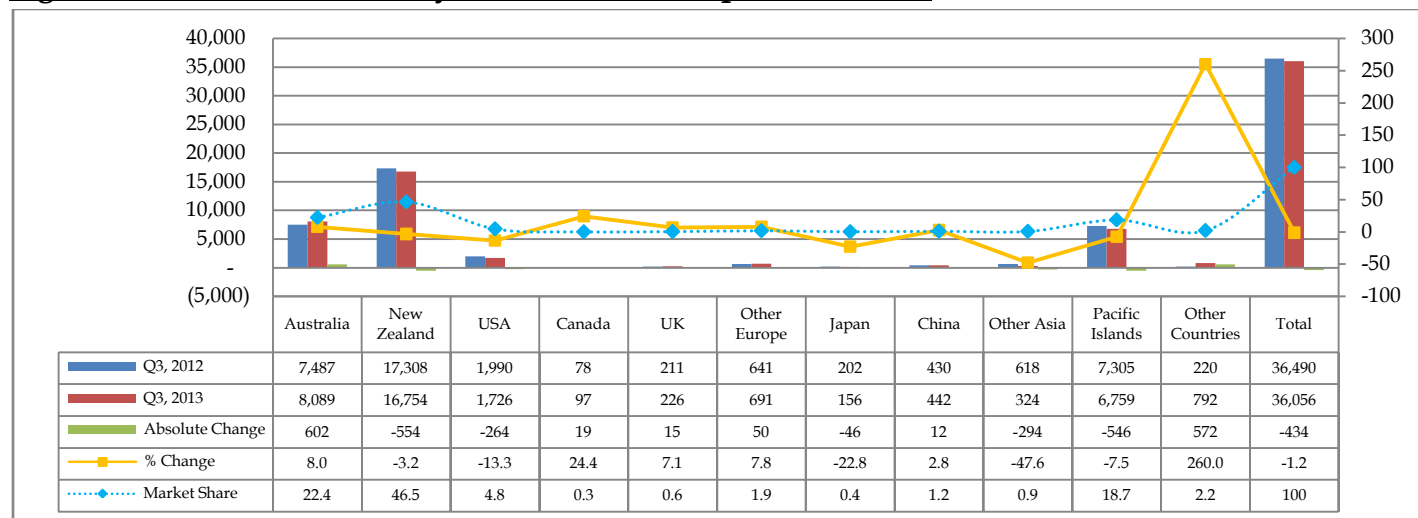
Source: PNG NTO and SPTO

Analysis by purpose of visit, indicated that while holiday, business MICE, VFR experienced positive growths, education and 'Others' declined. In terms of percentage share, business accounted for nearly half (49.8%) of the tourist traffic to the country during this quarter. This is followed by the holidaying segment with 38.3%, VFR 8.3%. Other purpose of visit classifications took 3.6% share.

Samoa – Quarter 3, 2013

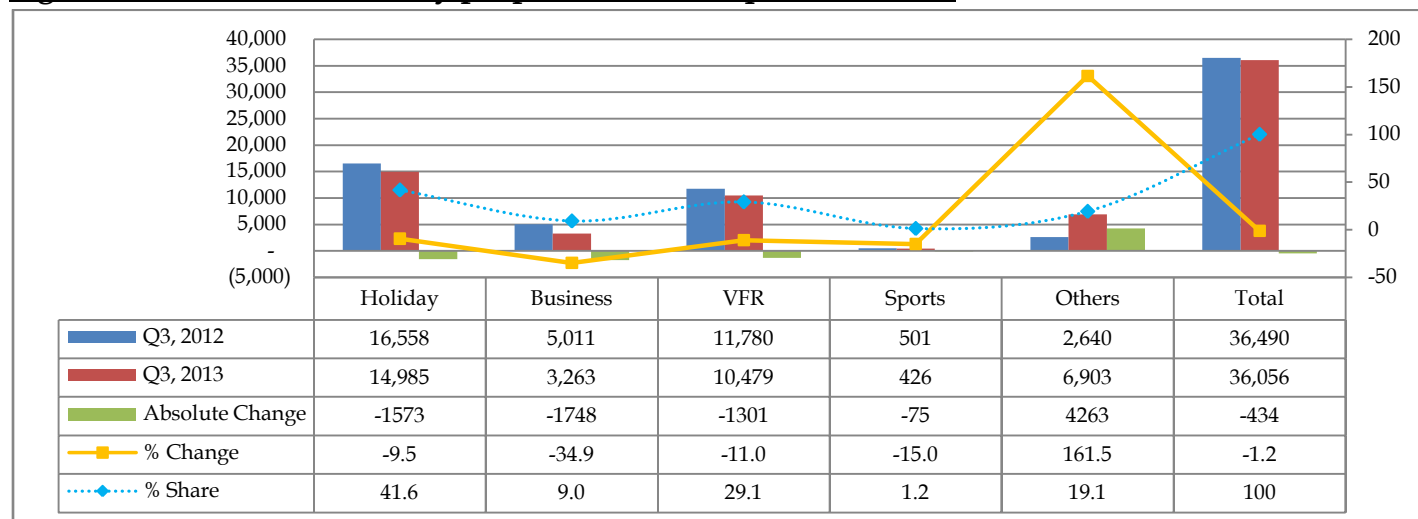
Overall, Samoa’s tourist traffic during Quarter 3, 2013 declined by a mere 1.2%. This is attributable to the decline in the New Zealand market, down by 3.2%; Pacific Islands down by 7.5%, Other Asia decrease by 47.6%, USA down by 13.3% and Japan a drop by 46%. On the positive side, Australia, Canada, UK, Europe and China recorded positive growths of 8.0%, 24.4%, 7.1%, 7.8% and 2.8% respectively.

Figure C29: Tourist arrivals by source market in quarter 3, 2013.



Source: Samoa NTO and SPTO

Figure C30: Tourist arrivals by purpose of visit in quarter 3, 2013.



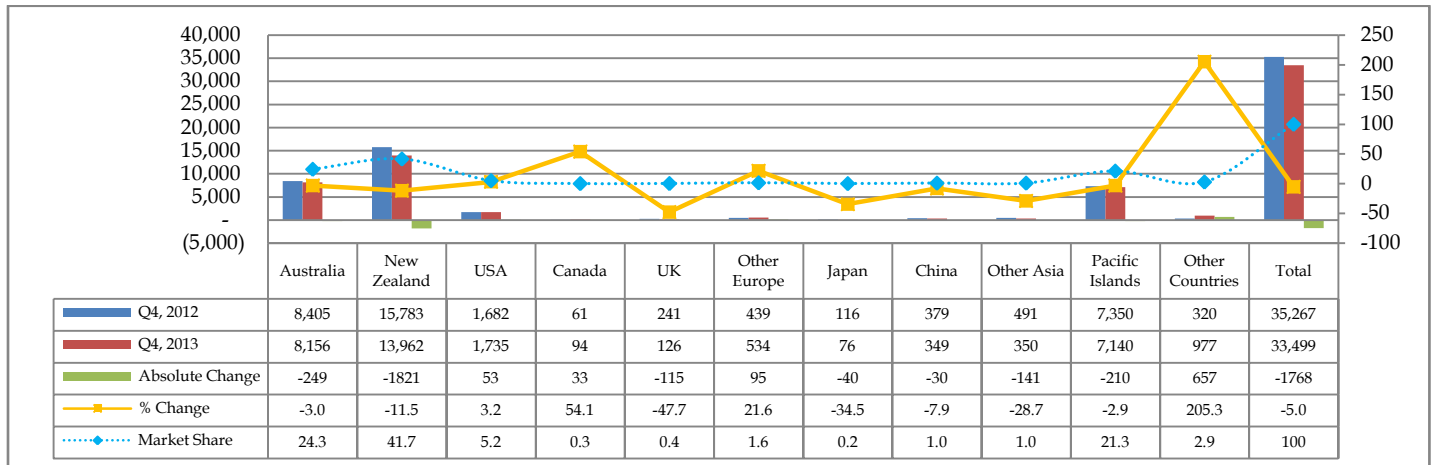
Source: Samoa NTO and SPTO

All purposes of visit registered declines as shown in Figure C30 above, except the classification ‘Others’ that showed a strong growth. The reasons for travelling to Samoa were for holidaying purposes (41.6%) with VFR (29.1%), business 9%, sports 1.2% and ‘others’ 19.1%.

Samoa – Quarter 4, 2013

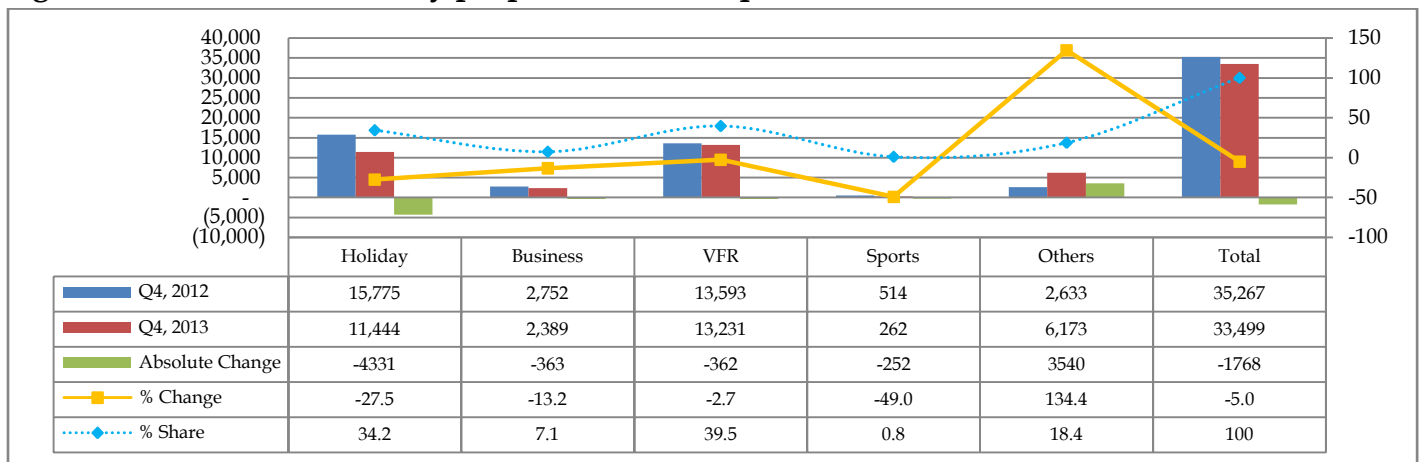
The downward trend felt during quarter 3, intensified in Quarter 4 now with a 5% decline. The contributory markets to this decline were New Zealand, down by 11.5%, Pacific Islands down by 2.9%, Australia down by 3%, UK down by 47.7%, Japan declined by 34.5%, China downed by 7.9% and Other Asia downed by 28.7%. Only USA, Canada, Europe and the Other Countries category recorded positive growths of 3.2%, 54.1%, 21.6%, and 205.3% respectively.

Figure C31: Tourist arrivals by source market in quarter 4, 2013.



Source: Samoa NTO and SPTO

Figure C32: Tourist arrivals by purpose of visit in quarter 4, 2013.



Source: Samoa NTO and SPTO

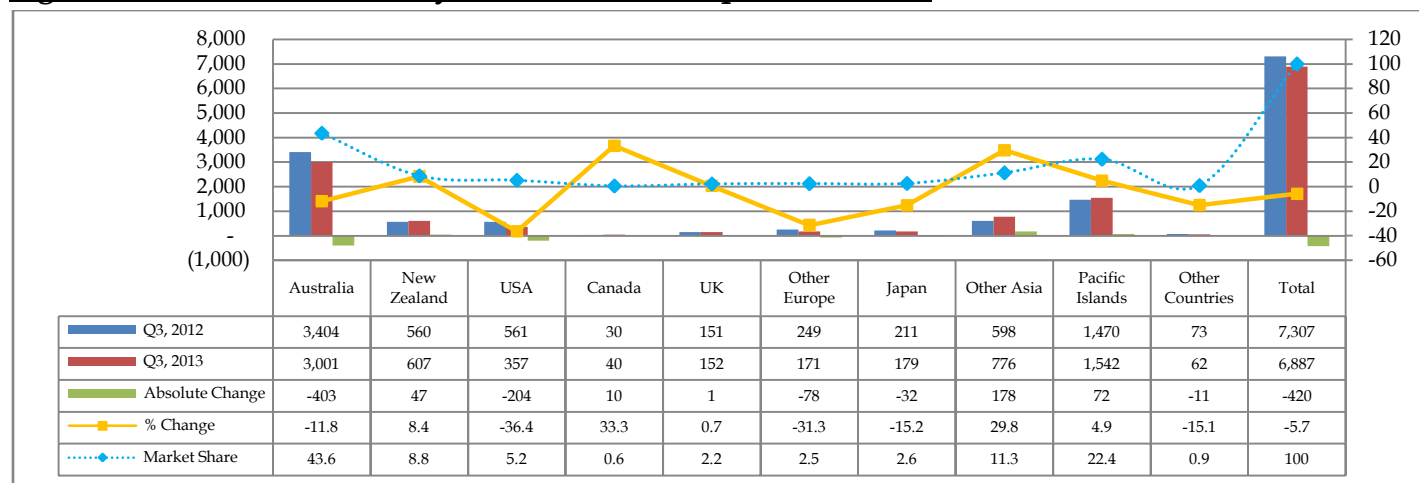
All purposes of visit declined as shown above in Figure C32, except 'Others' category which showed some promising results.

Solomon Islands – Quarter 3, 2013

Tourist arrivals to the Solomon Islands during Quarter 3 of 2013, declined by 5.7% when compared to the same period the previous year. That decline was attributable to declines by Australia (11.8%), USA (36.4%), Japan (15.2%), Europe (31.3%) and the Other Countries category (15.1).

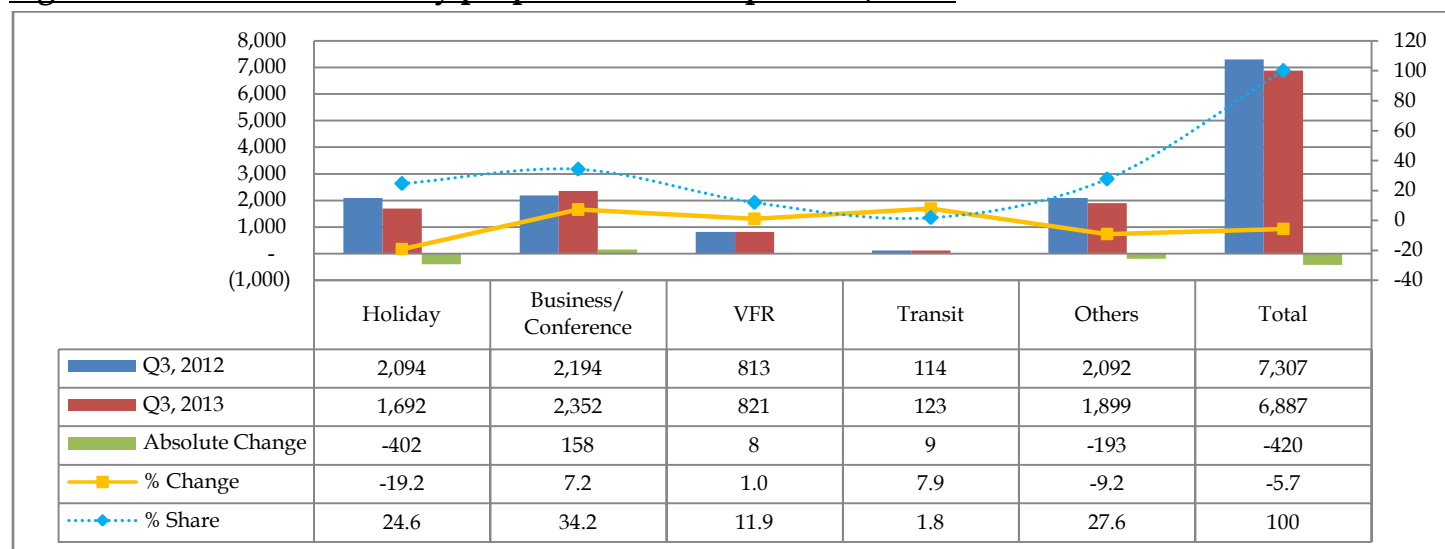
On the positive side as shown in Figure C33 below, New Zealand, Canada, UK, Other Asia, and the Pacific Islands rose in quarter 3, 2013 over the same period in 2012.

Figure C33: Tourist arrivals by source market in quarter 3, 2013.



Source: Solomon Islands NSO and SPTO

Figure C34: Tourist arrivals by purpose of visit in quarter 3, 2013.



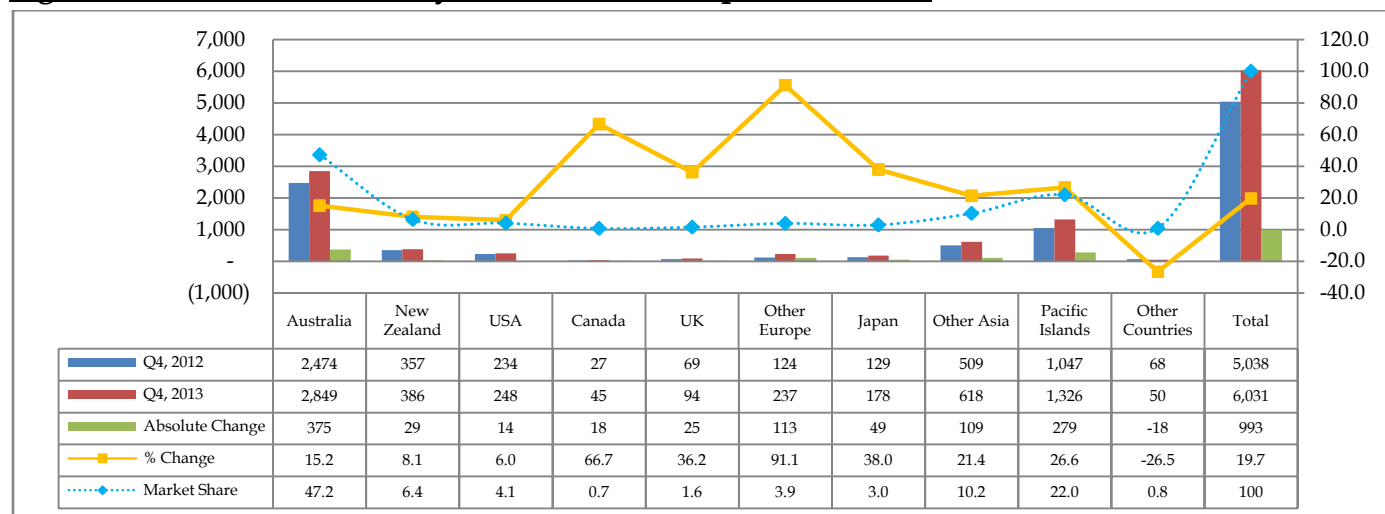
Source: Solomon Islands NSO and SPTO

Analysis by purpose of visit revealed that one-third (34.2% were business visitors while holidaying travelers accounted for 24.6%. The classification 'Others' received 27.6% share while VFR represented 11.9% and transit 1.8%. In terms of growth, the business, VFR and transit segments demonstrated positive growths but the holidaying and 'others' showed decreasing growths.

Solomon Islands - Quarter 4, 2013

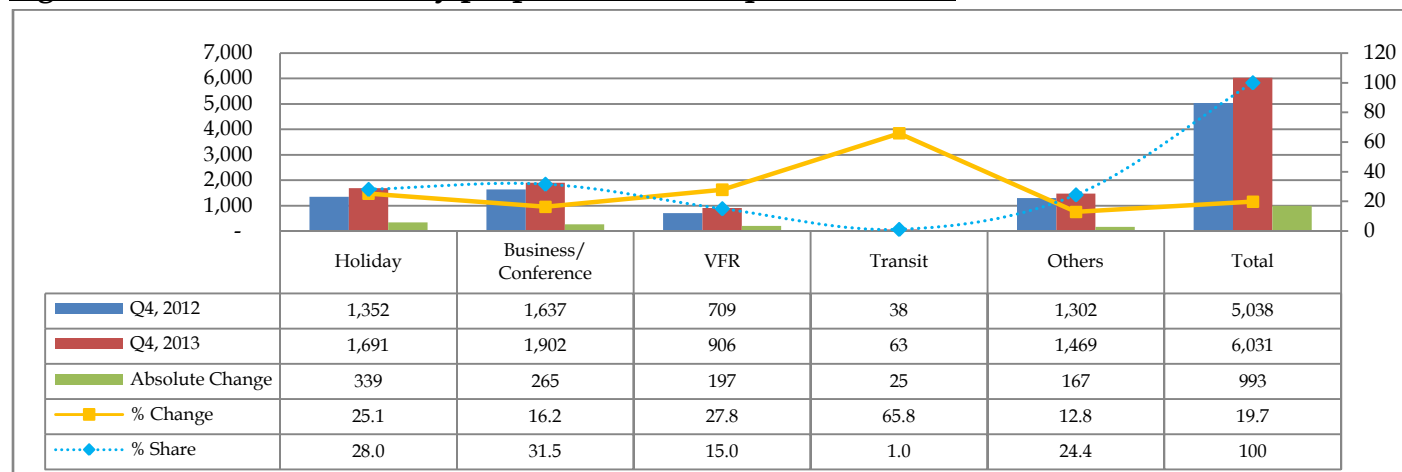
Unlike Quarter 3, the last quarter of 2013 showed signs of recovery and recorded an increase of 19.7%. Almost all source markets registered positive growth during this last quarter of 2013 except for the Other Countries category which declined by 26.5%.

Figure C35: Tourist arrivals by source market in quarter 4, 2013.



Source: Solomon Islands NSO and SPTO

Figure C36: Tourist arrivals by purpose of visit in quarter 4, 2013.



Source: Solomon Islands NSO and SPTO

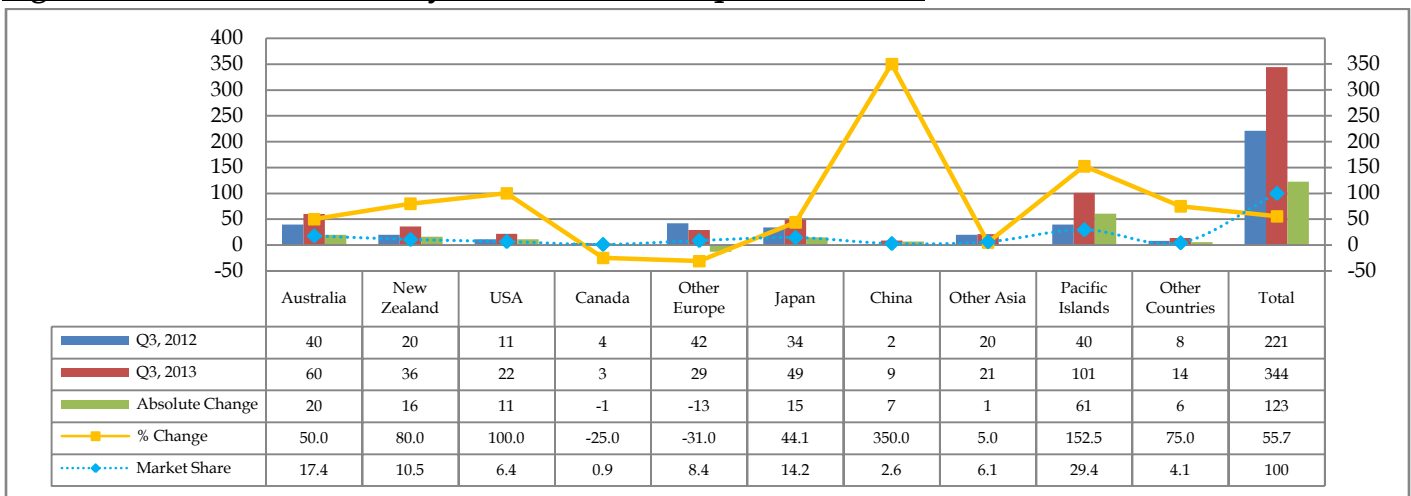
It was pleasing to note that all purposes of visits increased during this quarter under review which resulted in the overall promising performance by the country's tourism industry. In terms of percentage share, business visitors (31.5%) continued to dominate Solomon Islands tourist traffic. Holidaying tourists accounted for 28%, VFR 15% and Others 24.4% with transit visitors accounting for only 1%.

Tonga - No data available

Tuvalu - Quarter 3, 2013

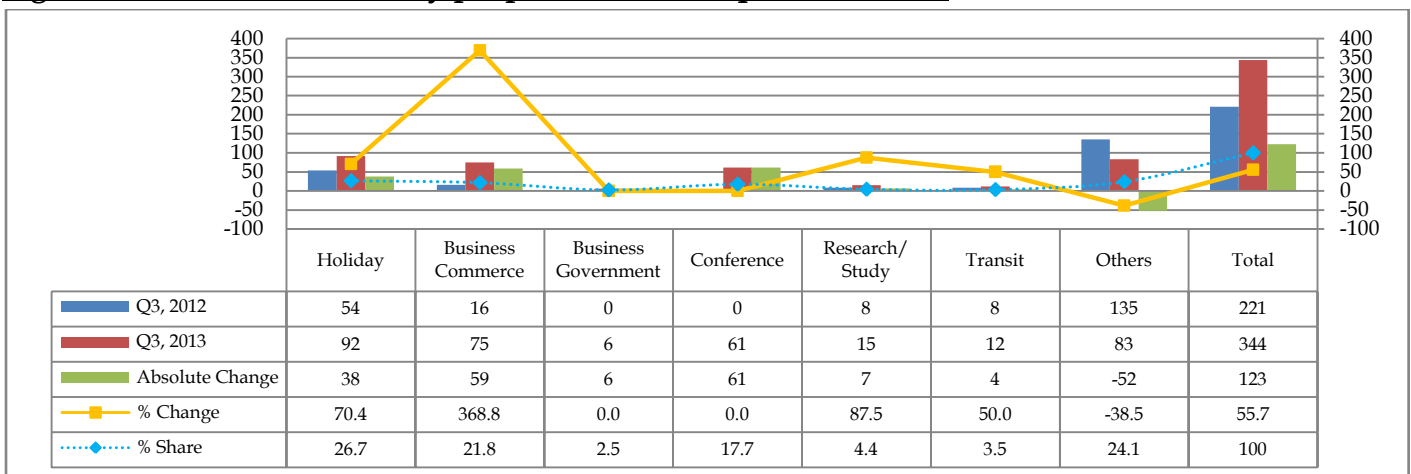
During the third quarter of 2013, Tuvalu received 344 visitors, representing an increase of 55.7%, which is equivalent to 123 additional tourists when compared to the same quarter of the previous year. The Pacific Islands category holds the largest share of the market with 29.4%, followed by Australia at 17.4%, Japan 14.2%, New Zealand 10.5% and the remaining 28.5% shared by other markets as shown below in Figure C37.

Figure C37: Tourist arrivals by source market in quarter 3, 2013.



Source: Tuvalu NTO and SPTO

Figure C38: Tourist arrivals by purpose of visit in quarter 3, 2013.



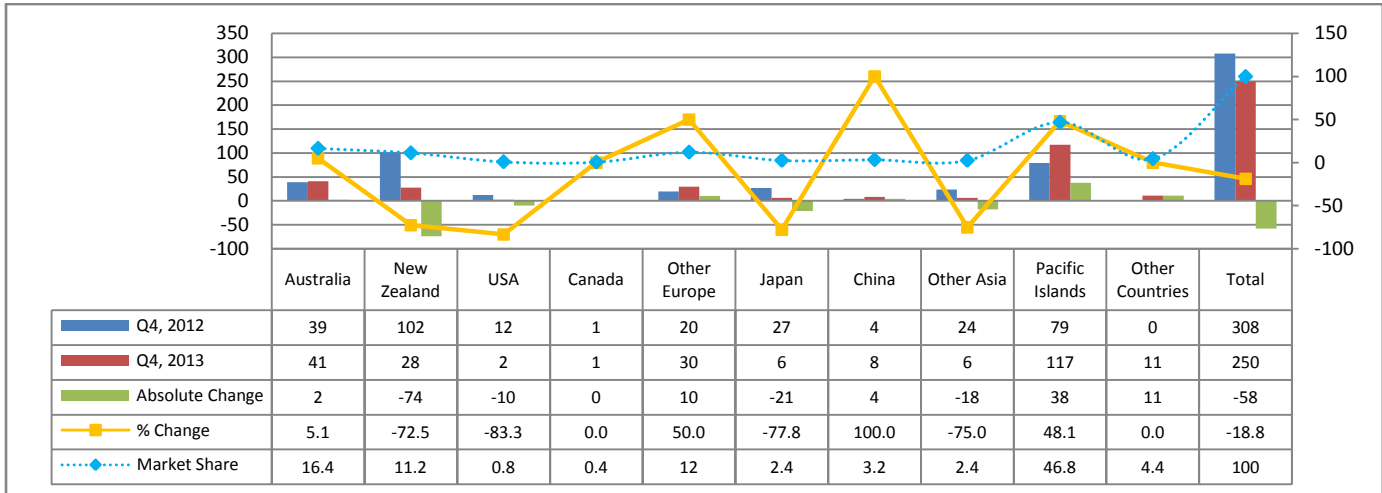
Source: Tuvalu NTO and SPTO

% Growth should be replaced by % Change; Market Share should be replaced by % Share. Analysis by purpose of visit showed increases in Holiday, Business for Commerce, Research & Study and transit. The 'Others' category registered a decline.

Tuvalu- Quarter 4, 2013

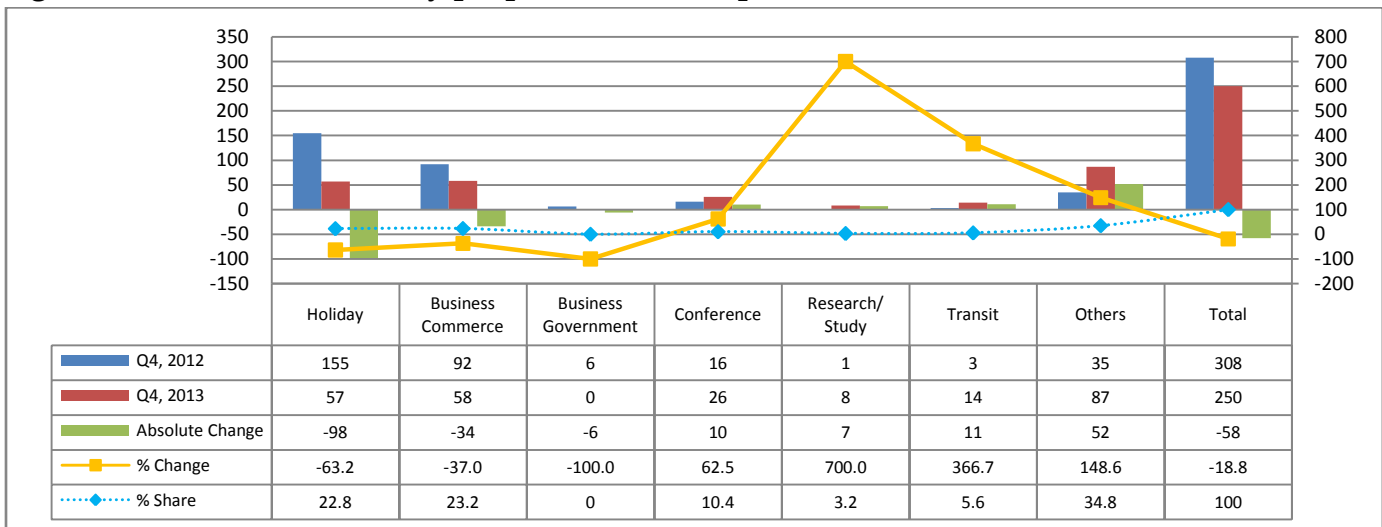
The fourth quarter of 2013 recorded a decline of 18.8%, equivalent to only a decline of 58 tourist numbers for Tuvalu. Mixed results were shown by source markets during the period under review as shown below in Figure C39.

Figure C39: Tourist arrivals by source market in quarter 4, 2013.



Source: Tuvalu NTO and SPTO

Figure C40: Tourist arrivals by purpose of visit in quarter 4, 2013.



Source: Tuvalu NTO and SPTO

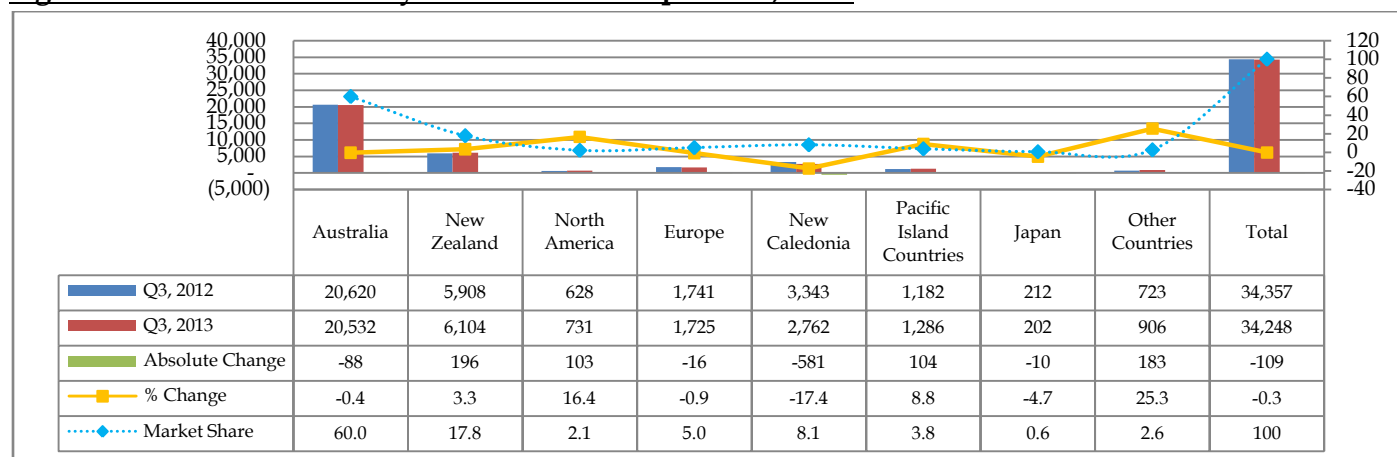
Analysis by purpose of visit indicated that positive growths were recorded for travelers visiting Tuvalu for the purpose of conference, research & study, transit and others. However, holiday and Business purpose of visit took dips during the last quarter of 2013.

Vanuatu – Quarter 3, 2013

In quarter three 34,248 tourist arrivals were reported to have visited the country representing a slight decline by 0.3% (or 109 in absolute terms) over the same period of the previous year. This decline was attributable to the depressing performance of the Australian market, downed by 0.4%, Europe downed by 0.9%, New Caledonia by 17.4% and Japan declined by 4.7%.

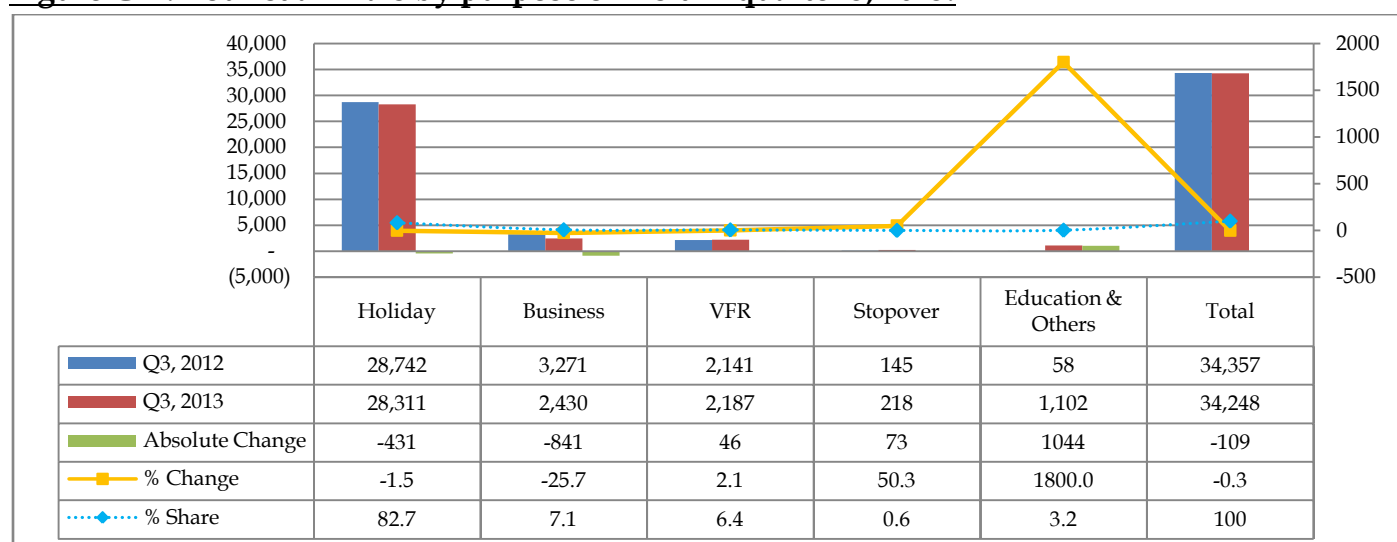
In terms of market growth, positive growths were recorded by the New Zealand market (3.3%), North America (16.4%), the Pacific Islands (8.8%) and the classification, 'Other Countries' (25.3%). Of these visitors in the third quarter, 60% were tourists originating from Australia. As evidenced, Australia is by far Vanuatu's single most important market. New Zealand accounted for 17.8% share and New Caledonia 8.1%. The other markets like Europe took 5% share, Pacific Islands 3.8%, and North America 2.1%.

Figure C41: Tourist arrivals by source market in quarter 3, 2013.



Source: Vanuatu NSO and SPTO

Figure C42: Tourist arrivals by purpose of visit in quarter 3, 2013.



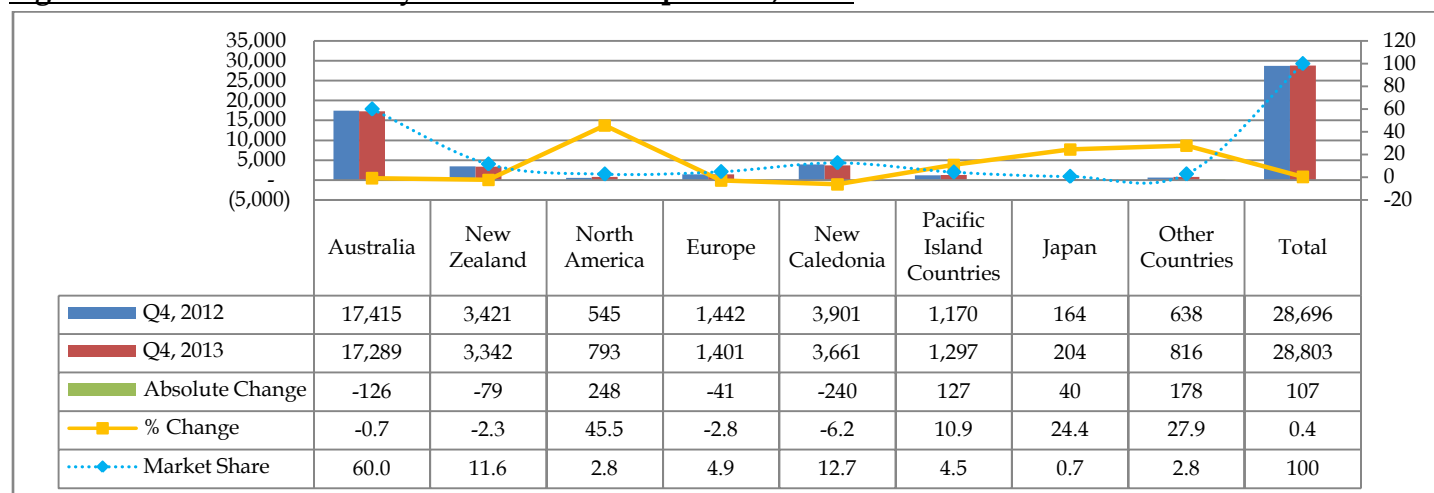
Source: Vanuatu NTO and SPTO

Analysis by purpose of visit showed almost 83% of Vanuatu's tourist traffic were visiting for holiday and leisure – this is a very high percentage share compared to most, if not all, countries of the Pacific Islands depicting the country as predominantly a holidaying destination. The remaining 17% was shared by the business segment (7.1%) and VFR (6.4%) and education and others accounted for the remaining balance.

Vanuatu – Quarter 4, 2013

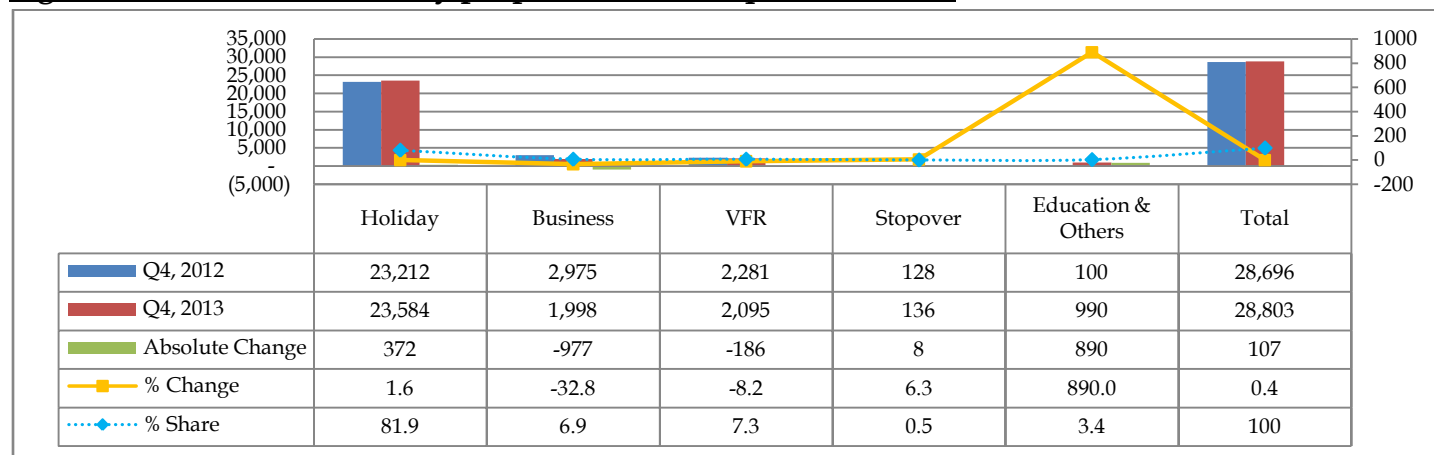
The depressing performance experienced during Quarter 3 bounced back in Quarter 4 with a slight positive growth of 0.4% (or 107 in absolute terms) when compared to the same period of 2012. Mixed results were recorded by source markets during the period under review as shown in figure C43 below.

Figure C43: Tourist arrivals by source market in quarter 4, 2013.



Source: Vanuatu NSO and SPTO

Figure C44: Tourist arrivals by purpose of visit in quarter 4, 2013.



Source: Vanuatu NSO and SPTO

Analysis by purpose of visit revealed that Vanuatu maintained its position in Quarter 4 as a predominantly holidaying destination with 82% of its tourist traffic visiting for holiday purposes. The remaining 18% was shared by the business segment (6.9%) VFR (7.3%), education and others (3.4%) and stopovers (0.5%).



South Pacific Tourism Organisation

Level 3, FNPF Place, 343-359 Victoria Parade

P.O. Box 13119, Suva, Fiji Islands.

Phone: +679 3304177 | Fax: +679 3301995

Email: tourism@spto.org

Website: www.spto.org

'Marketing and Developing Tourism in the South Pacific'