

PACIFIC REGIONAL TOURISM CAPACITY BUILDING PROGRAMME (PRTCBP)

QUARTERLY REVIEW OF TOURIST ARRIVALS IN PACIFIC ISLAND COUNTRIES

QUARTER 4, 2014



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PREFACE

The *Quarterly Review of Tourism, Fourth Quarter 2014* is published by the South Pacific Tourism Organization (SPTO) within the framework of its Pacific Regional Tourism Capacity Building Programme (PRTCBP) funded by the European Union through the 10th EDF. This report presents a review of the performance of the tourism industry in the fourth quarter of 2014 and the year ending December 2014 with comparative data for the same periods of the previous year, in the SPTO region, as well as in individual member countries.

Out of the eighteen Pacific Island countries, thirteen responded with the required data in time for the preparation of this publication, but it was not possible to get data from Nauru, Kiribati, Marshall Islands, Timor Leste and Tonga in time. SPTO will continue its efforts to collect data from all member countries for inclusion in the next report.

This report is a quarterly statistical publication produced by the Division of Research and Planning of SPTO. Besides this regular publication, the Division also produces on an annual basis the pocket-sized *SPTO Facts & Figures*. Ad hoc Air and Cruise Visitor Survey reports have been implemented in some selected member countries. Economic Impact studies are also being planned for this year, 2015. *The detailed South Pacific Regional Tourism Statistics* is being planned to be prepared for the first-time in 2015

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DEFINITION AND CONCEPTS

The 2014 Regional Conference on Measuring Tourism held in Nadi in March under the auspices of the South Pacific Tourism Organization (SPTO) agreed to adopt the following definitions and terms recommended by the UNWTO and United Nations Statistical Office for compilation of tourism statistics according to these definitions:

The term ‘visitor’ describes a person visiting a country other than that in which he/she has his/her usual place of residence for any reason other than following an occupation remunerated from within the country visited.

The definition covers two categories of visitors, namely,

Tourist: Visitor staying in the country visited for at least one night and not more than one year. However, the term ‘visitor’ is also used in the text of this report interchangeably for better reading but with the same meaning.

Excursionist: Visitor who does not stay overnight in the country visited – this report does not include this.

SOURCES OF INFORMATION

All sources of statistical information contained in this publication are acknowledged at the foot of each table – mainly the national statistical offices and national tourism offices. In a few instances, the statistics required have been obtained directly from research and statistics divisions of national tourism offices.

The source of information for tourist arrival statistics in all member countries is the E/D immigration arrival card. All 17 member countries of SPTO have different E/D arrival card containing the required categories of information, which help distinguish tourists from other passengers and compile statistics according to the internationally accepted definitions and concepts to facilitate inter-country comparisons. The Regional Conference on Measuring Tourism held in Nadi 2014 proposed the introduction of standard E/D Cards for Pacific ACPs and SPTO Member Countries, however, these introductions have yet to be made.

World Overview

The January 2015 UNWTO World Tourism Barometer recorded that over 1.1 billion tourists travelled abroad in 2014. This signifies a 4.7% increase and 2014 marks the fifth consecutive year of robust growth above the long term average since the financial crisis of 2009. Table W1 below shows a comparative growth analysis of the five regions of the world in 2014. In this period, the Americas were the fastest growing region (with 7%) of the world followed by Asia & the Pacific, with 5%. Under Asia & the Pacific, Oceania (that covers the Pacific ACPs and SPTO member countries) grew by 6%. The Middle East region showed signs of rebound with a growth of 4%.

Table W1: World Tourist Arrivals by Percentage Growth

Region	2013 % Growth	2014 % Growth
Africa	6	2
Americas	4	7
Asia & the Pacific	6	5
Europe	5	4
Middle East	0	4

Source: UNWTO

Tourist Arrivals into Pacific ACP & SPTO Member Countries¹

In Quarter 4, 2014, the Pacific ACP and SPTO member countries² received a total of 451,348 tourists. This showed a 10.3% increase when compared to the same period in 2013. Countries that recorded positive growths include Fiji, French Polynesia, New Caledonia, Niue, Palau, Papua New Guinea, Samoa, Tuvalu and Vanuatu. Palau accounted for highest growth of 63.2%. This significant growth was attributable to direct services between Palau and Hong Kong via Dynamic Airways, Asian Air, Palau Pacific Air and Mega Maldives. The remaining four countries recorded declines and these were American Samoa, Cook Islands, FSM and Solomon Islands. FSM visitor arrivals slumped by 25%, followed by Solomon Islands with nearly 20%. The summary is presented in Table R1 and Figure R1 below.

Table R1: Tourist Arrivals to Pacific ACP and SPTO Member Countries, Quarter 4, 2014

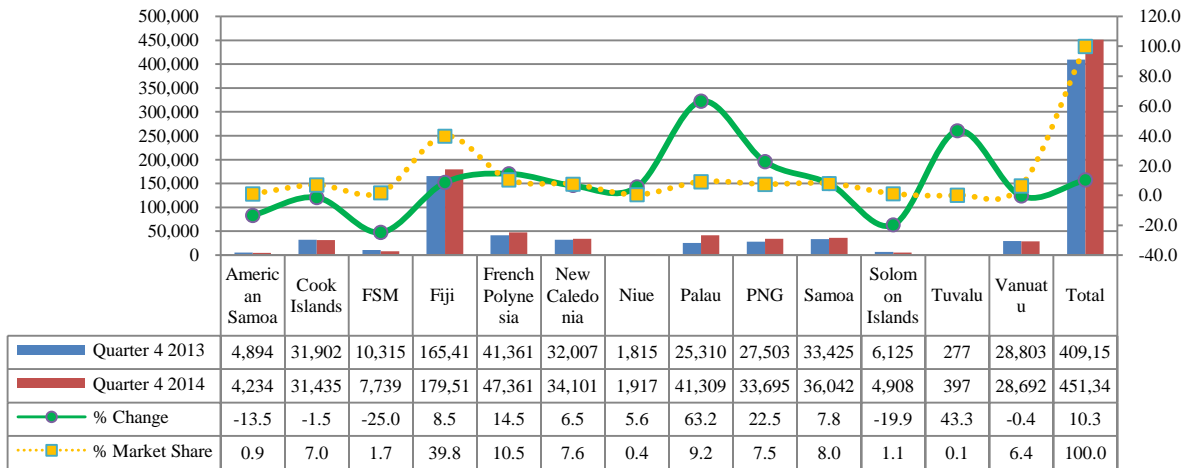
Pacific Countries	Q 4, 2013	Q 4, 2014	Absolute Change	% Change	% Market Share
American Samoa	4,894	4,234	-660	-13.5	0.9
Cook Islands	31,902	31,435	-467	-1.5	7.0
FSM	10,315	7,739	-2,576	-25.0	1.7
Fiji	165,415	179,518	14,103	8.5	39.8
French Polynesia	41,361	47,361	6,000	14.5	10.5
New Caledonia	32,007	34,101	2,094	6.5	7.6
Niue	1,815	1,917	102	5.6	0.4
Palau	25,310	41,309	15,999	63.2	9.2
PNG	27,503	33,695	6,192	22.5	7.5
Samoa	33,425	36,042	2,617	7.8	8.0
Solomon Islands	6,125	4,908	-1,217	-19.9	1.1
Tuvalu	277	397	120	43.3	0.1
Vanuatu	28,803	28,692	-111	-0.4	6.4
Total	409,152	451,348	42,196	10.3	100

Source: NTOs, NSOs and SPTO

¹Peoples' Republic of China, Cook Islands, Fiji, FSM, French Polynesia, Kiribati, Marshall islands, Nauru, New Caledonia, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tuvalu and Vanuatu

² Quarter 4, 2014 data from Tonga, Timor Leste, Nauru, and Kiribati are not available.

Figure R1: Tourist Arrivals into Pacific ACP and SPTO Member Countries in Quarter 4, 2014



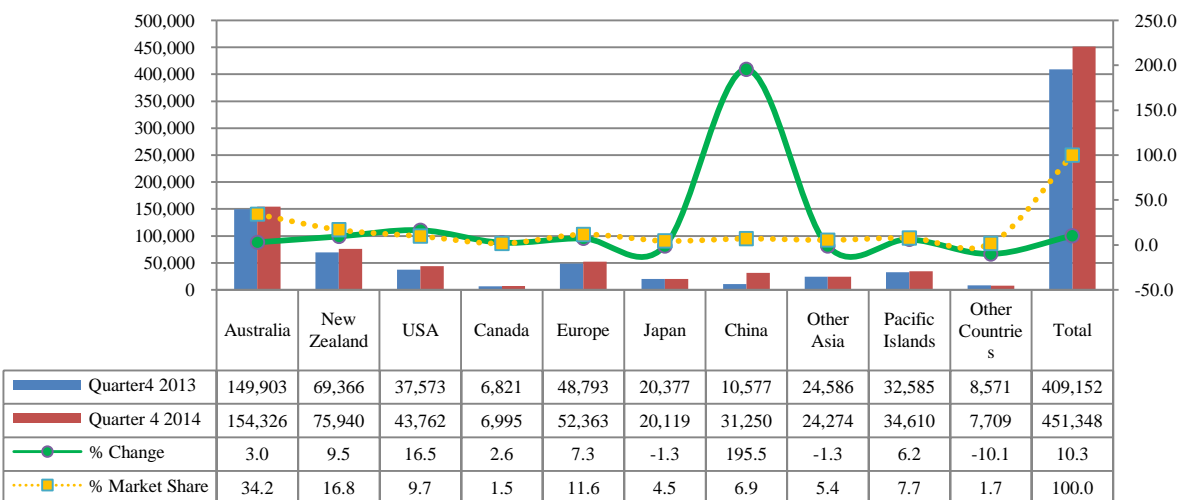
Source: NTOs, NSOs and SPTO

Table R2: Tourist Arrivals by Market, Quarter 4, 2014

Market	Q4, 2013	Q 4, 2014	Absolute Change	% Change	% Market Share
Australia	149,903	154,326	4,423	3.0	34.2
New Zealand	69,366	75,940	6,574	9.5	16.8
USA	37,573	43,762	6,189	16.5	9.7
Canada	6,821	6,995	174	2.6	1.5
Europe	48,793	52,363	3,570	7.3	11.6
Japan	20,377	20,119	-258	-1.3	4.5
China	10,577	31,250	20,673	195.5	6.9
Other Asia	24,586	24,274	-312	-1.3	5.4
Pacific Islands	32,585	34,610	2,025	6.2	7.7
Other Countries	8,571	7,709	-862	-10.1	1.7
Total	409,152	451,348	42,196	10.3	100

Source: NTOs, NSOs and SPTO

Figure R2: Tourist Arrivals by Source Market, Quarter 4, 2014



Source: NTOs, NSOs and SPTO

Market Performance

Australian Market

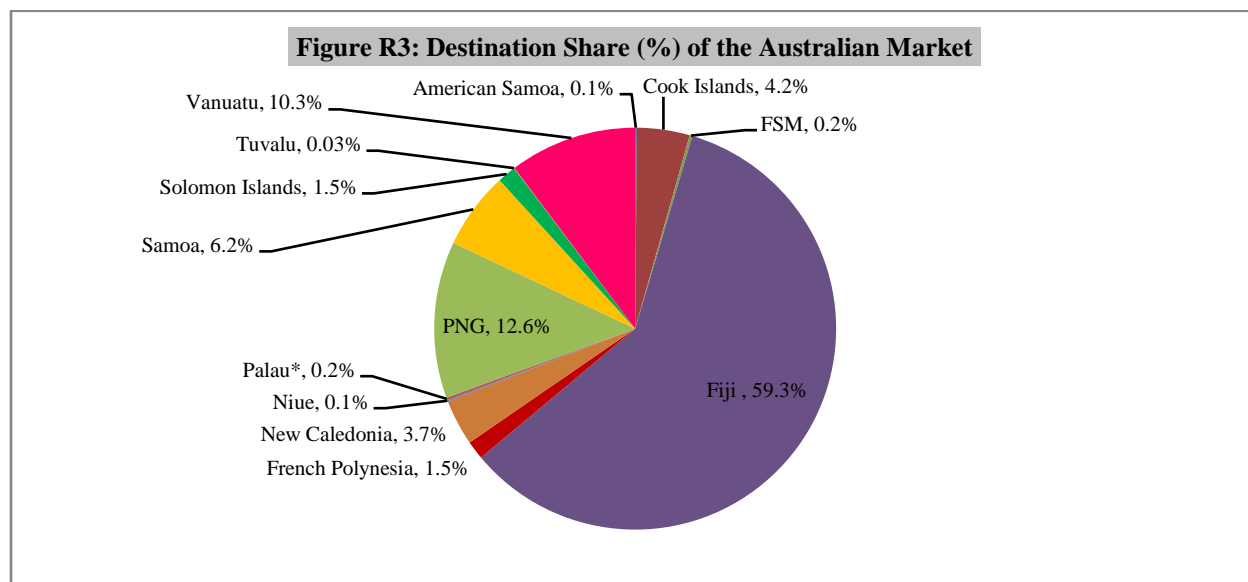
The Australian Bureau of Statistics reported more than 2.4 million short term departures by residents in quarter 4, 2014. Of this, the region received a mere 6.4% which equates to 154,326 Australian tourists. Majority of these visitors visited Fiji accounting for 59.3% of the total tourists to the region. Similar to quarters 1 to 3 in 2014, Australian tourists dominated tourist arrivals to the region with a share of 34.2%. Countries that registered positive growths include Fiji, New Caledonia, Niue, Palau, PNG, Samoa and Tuvalu. The remaining countries recorded declines with Solomon Islands having the biggest loss of 19.3%. When compared to the same period in 2013. Details are shown in Table R3 and Figure R3 below.

Table R3: Australian Tourists by Destination and Destination Share, Quarter 4, 2014

Destination	Q4, 2013	Q4, 2014	Absolute Change	% Change	% Share
American Samoa	226	211	-15	-6.6	0.1
Cook Islands	7,068	6,548	-520	-7.4	4.2
Federated States of Micronesia	360	336	-24	-6.7	0.2
Fiji	89,671	91,537	1,866	2.1	59.3
French Polynesia	2,341	2,310	-31	-1.3	1.5
New Caledonia	4,350	5,700	1,350	31.0	3.7
Niue	152	176	24	15.8	0.1
Palau*	288	305	17	5.9	0.2
Papua New Guinea	17,116	19,435	2,319	13.5	12.6
Samoa	8,152	9,587	1,435	17.6	6.2
Solomon Islands	2,849	2,300	-549	-19.3	1.5
Tuvalu	41	51	10	24.4	0.03
Vanuatu	17,289	15,830	-1,459	-8.4	10.3
Total	149,903	154,326	4,423	3.0	100.0

Note: Data not available for Kiribati, Marshall islands, Nauru, Timor Leste and Tonga.* Palau figures include Australia/New Zealand together.

Source: NTOs, NSOs and SPTO



New Zealand Market

According to Statistics New Zealand, there were 615,600 resident departures in quarter 4, 2014 of which 12.3% visited the Pacific region. This equates to a total of 75,940 New Zealand tourists. The main beneficiaries were Fiji (39.6%), Cook Islands (25.8%) and Samoa (19.8%). These three countries accounted for 85.2% of the total New Zealand tourists' traffic to the region. The remaining 14.8% were distributed amongst the other Pacific countries. In comparison to the same period in the previous year, this result was a positive one with 9.5% growth..

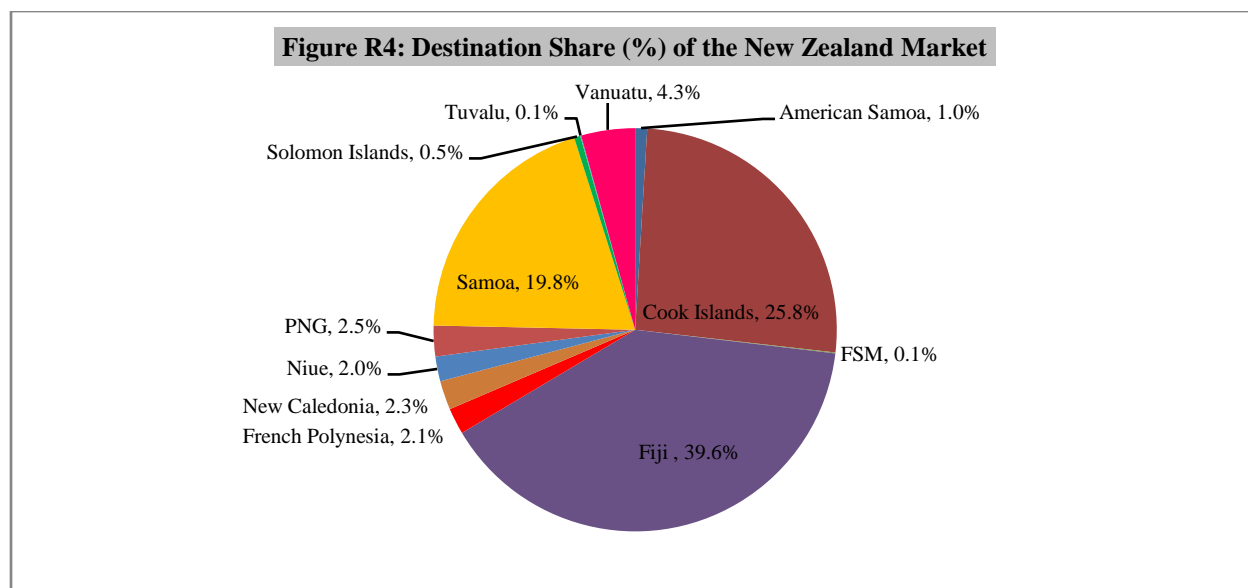
Table R4:– New Zealand Tourists by Destination and Destination Share, Quarter 4, 2014

Destination	Quarter 4 2013	Quarter 4 2014	Absolute Change	% Change	% Market Share
American Samoa	668	727	59	8.8	1.0
Cook Islands	19,323	19,625	302	1.6	25.8
FSM	64	56	-8	-12.5	0.1
Fiji	25,446	30,058	4,612	18.1	39.6
French Polynesia	1,645	1,597	-48	-2.9	2.1
New Caledonia	1,767	1,769	2	0.1	2.3
Niue	1,490	1,509	19	1.3	2.0
PNG	1,249	1,869	620	49.6	2.5
Samoa	13,958	15,013	1,055	7.6	19.8
Solomon Islands	386	382	-4	-1.0	0.5
Tuvalu	28	52	24	85.7	0.1
Vanuatu	3,342	3,283	-59	-1.8	4.3
Total	69,366	75,940	6,574	9.5	100.0

Note: Data not available for Kiribati, Marshall Islands, Nauru, Timor Leste and Tonga.

Palau figures included with Australia.

Source: NTOs, NSOs and SPTO



USA Market

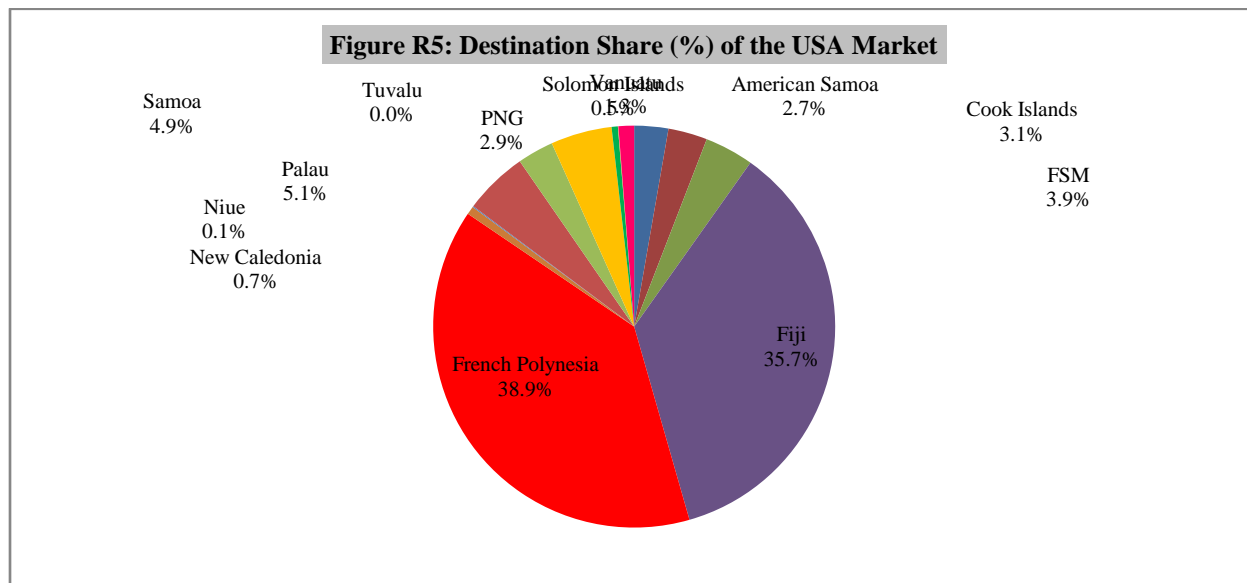
The US Office of Travel & Tourism Industries reported that there were more than 16 million resident departures in quarter 4, 2014. Of this, 0.3% or 43,762 visited the region. French Polynesia received the highest number of visitors from this market which accounted for 38.9% followed by Fiji with 35.7%. The remaining 25.4% were distributed among other countries. This market performed well recording a 16.5% growth in comparison to the same quarter in 2013.

Table R5: USA Tourists by Destination and Destination Share, Quarter 4, 2014

Destination	Quarter 4 2013	Quarter 4 2014	Absolute Change	% Change	% Market Share
American Samoa	1,123	1,198	75	6.7	2.7
Cook Islands	1,257	1,377	120	9.5	3.1
FSM	2,211	1,723	-488	-22.1	3.9
Fiji	12,931	15,640	2,709	20.9	35.7
French Polynesia	13,919	17,036	3,117	22.4	38.9
New Caledonia	391	287	-104	-26.6	0.7
Niue	16	36	20	125.0	0.1
Palau	1,860	2,249	389	20.9	5.1
PNG	1,076	1,275	199	18.5	2.9
Samoa	1,732	2,155	423	24.4	4.9
Solomon Islands	248	220	-28	-11.3	0.5
Tuvalu	16	18	2	12.5	0.04
Vanuatu	793	548	-245	-30.9	1.3
Total	37,573	43,762	6,189	16.5	100.0

Note: Data not available for Kiribati, Marshall Islands, Nauru, Timor Leste and Tonga. Vanuatu figure includes Canada.

Source: NTOs, NSOs and SPTO



European Market

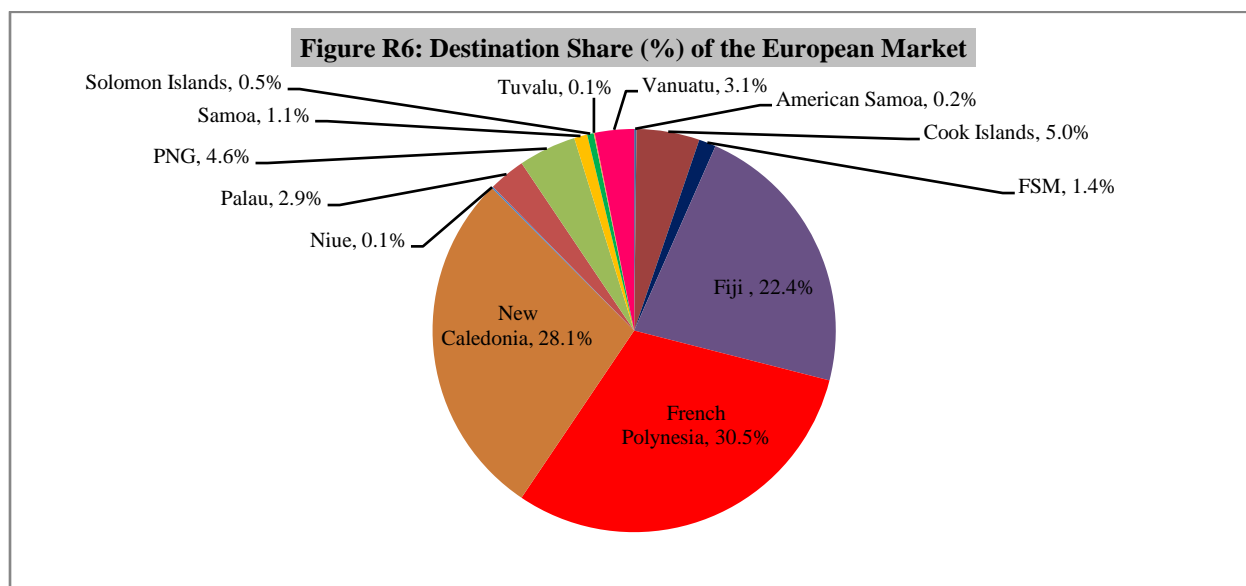
In quarter 4, 2014, 52,363 European tourists visited the region, of which, 30.5% visited French Polynesia followed by New Caledonia (28.1%) and Fiji (22.4%) The European market remains the single major source market for French Polynesia and New Caledonia. The highest percentage growth was reported by Tuvalu of 82.6%, while PNG had a 57.7% growth. Other countries had modest increases except for FSM, New Caledonia, Samoa and Solomon Islands which all declined. Overall, this market grew at 7.3% compared to the same period last year.

Table R6: European Tourists by Destination and Destination Share, Quarter 4, 2014

	Quarter 4 2013	Quarter 4 2014	Absolute Change	% Change	% Market Share
American Samoa	85	99	14	16.5	0.2
Cook Islands	2,505	2,644	139	5.5	5.0
FSM	816	718	-98	-12.0	1.4
Fiji	11,213	11,713	500	4.5	22.4
French Polynesia	13,700	15,951	2,251	16.4	30.5
New Caledonia	14,779	14,698	-81	-0.5	28.1
Niue	60	69	9	15.0	0.1
Palau	1,493	1,537	44	2.9	2.9
PNG	1,534	2,419	885	57.7	4.6
Samoa	759	552	-207	-27.3	1.1
Solomon Islands	425	275	-150	-35.3	0.5
Tuvalu	23	42	19	82.6	0.1
Vanuatu	1,401	1,646	245	17.5	3.1
Total	48,793	52,363	3,570	7.3	100.0

Note: Data not available for Kiribati, Marshall Islands, Nauru, Timor Leste, and Tonga.

Source: NTOs, NSOs and SPTO



Japanese Market

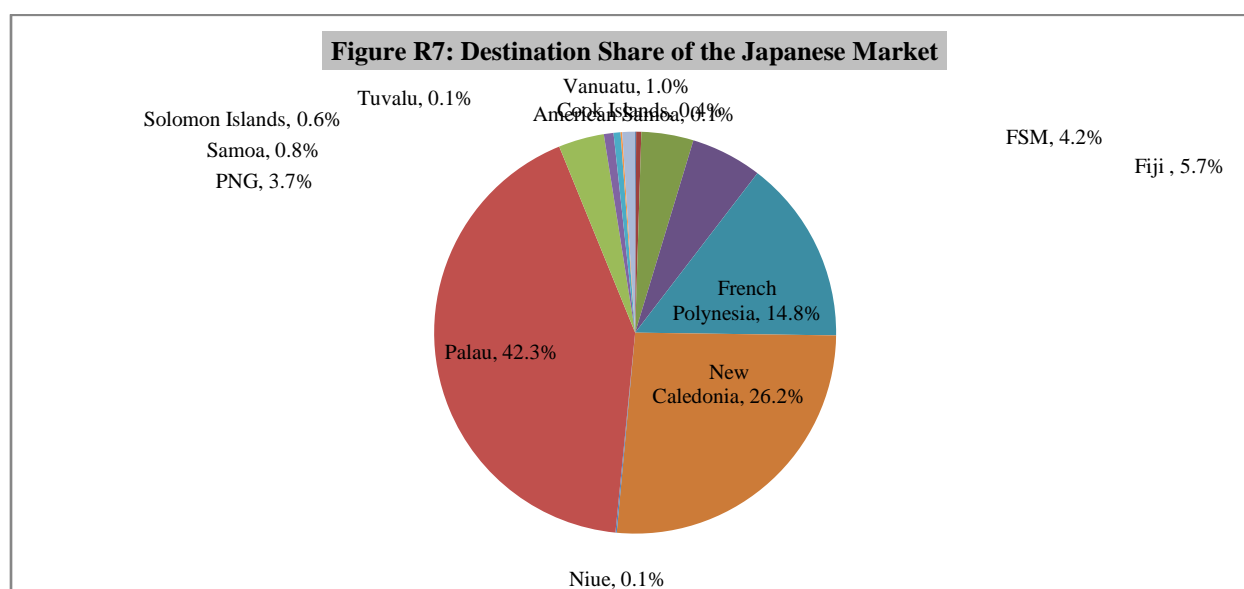
Statistics released by Japan National Tourism Organization revealed that there were more than 4.1 million Japanese outbound travelers in quarter 4, 2014. The region received a mere 0.5% of this outbound traffic from the Japanese market which equates to 20,119. This represented a slight decline of 1.3% growth when compared to the same quarter the previous year. Details are tabulated in Table R7 below.

Table R7: Japanese Tourists by Destination and Destination Share, Quarter 4, 2014

	Quarter 4 2013	Quarter 4 2014	Absolute Change	% Change	% Market Share
American Samoa	20	16	-4	-20.0	0.1
Cook Islands	72	83	11	15.3	0.4
FSM	1,131	843	-288	-25.5	4.2
Fiji	1,514	1,153	-361	-23.8	5.7
French Polynesia	3,333	2,979	-354	-10.6	14.8
New Caledonia	4,036	5,280	1,244	30.8	26.2
Niue	14	21	7	50.0	0.1
Palau	9,133	8,503	-630	-6.9	42.3
PNG	641	739	98	15.3	3.7
Samoa	76	156	80	105.3	0.8
Solomon Islands	178	112	-66	-37.1	0.6
Tuvalu	25	27	2	8.0	0.1
Vanuatu	204	207	3	1.5	1.0
Total	20,377	20,119	-258	-1.3	100.0

Note: Data not available for Kiribati, Marshall Islands, Nauru, Timor Leste and Tonga.

Source: NTOs, NSOs and SPTO



Chinese Market

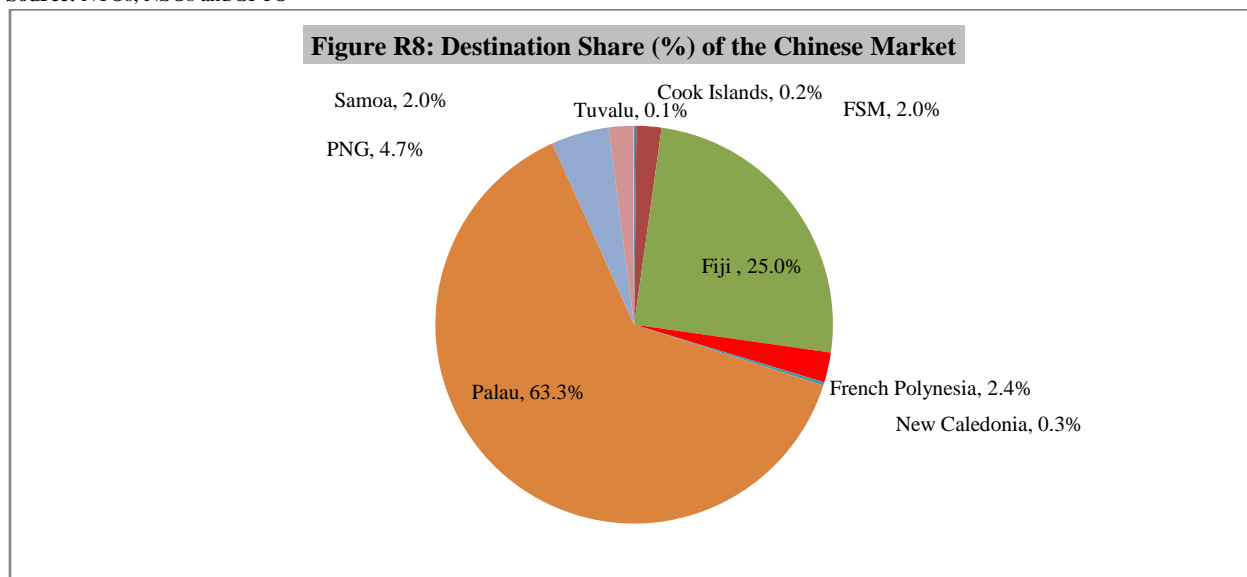
During the period under review, 31,250 Chinese tourists visited the region. However, it is important to note that this does not cover all Chinese visitors to the region as some regional countries include tourists from China as part of Asia, Other Asia and Other Countries. Of this, 63.3% visited Palau. Chinese visitor arrivals to Palau increased significantly with an increase by 889% in comparison to quarter 4, 2013 which was attributable to the increase in direct flights from Hong Kong. 25% of Chinese visitors visited Fiji while the remaining share was distributed among the other regional countries. All countries represented registered increases except for Cook Islands and FSM which declined by 19.7% and 28.2% respectively. This is an emerging market and evidence shows a strong upward trend and increasingly regional countries are adjusting their systems into presenting tourist arrivals from China separately in order to monitor performance.

Table R8: Chinese Tourists by Destination and Destination Share, Quarter 4, 2014

	Quarter 4 2013	Quarter 4 2014	Absolute Change	% Change	% Market Share
Cook Islands	71	57	-14	-19.7	0.2
FSM	883	634	-249	-28.2	2.0
Fiji	5,624	7,824	2,200	39.1	25.0
French Polynesia	476	763	287	60.3	2.4
New Caledonia	76	82	6	7.9	0.3
Palau	2,000	19,780	17,780	889.0	63.3
PNG	1,092	1,466	374	34.2	4.7
Samoa	349	612	263	75.4	2.0
Tuvalu	6	32	26	433.3	0.1
Total	10,577	31,250	20,673	195.5	100.0

Note: Data not available for American Samoa, Kiribati, Marshall Islands, Nauru, Niue, Solomon Islands, Timor Leste, Tonga and Vanuatu.

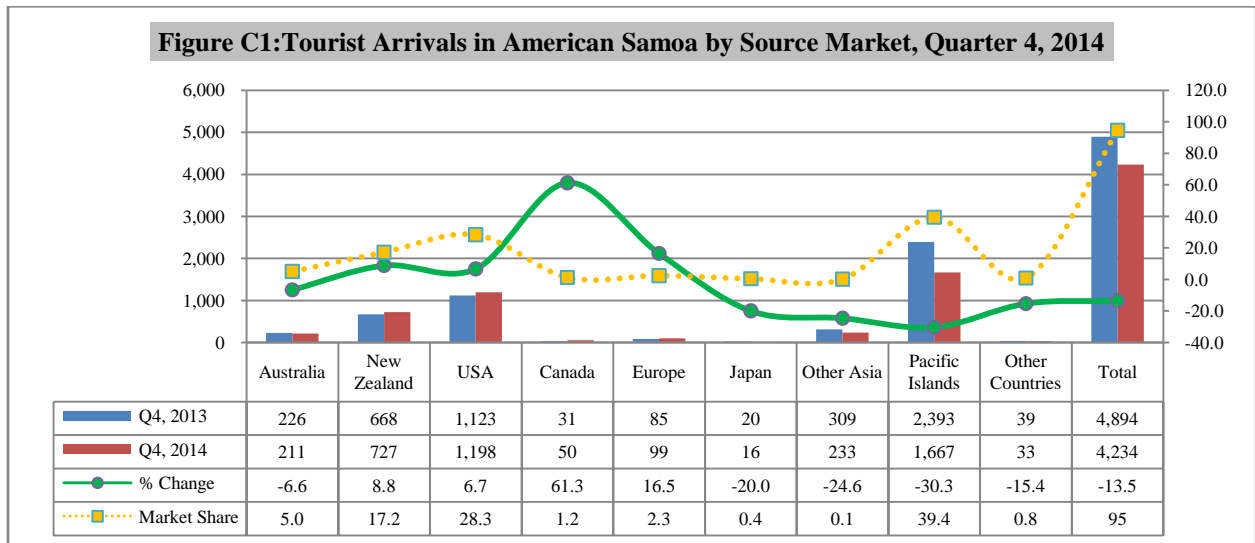
Source: NTOs, NSOs and SPTO



Destination Analysis

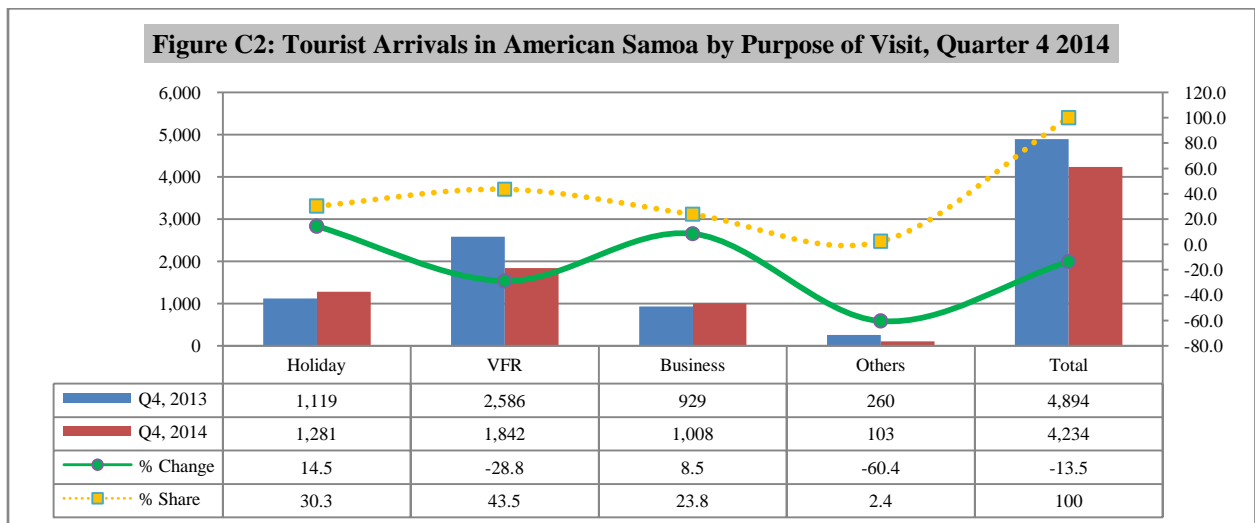
American Samoa

During Quarter 4, 2014, American Samoa received 4,234 tourists. The Pacific Islands provided most (39.4%) of the tourist traffic to this country, followed by USA (28.3%) and New Zealand next with a market share of 17.2%. Markets that registered positive growth during this period were New Zealand (up 8.8%), USA (up 6.7%), Canada (up 61.3%) and Europe (up 16.5%). Figure C1 below clearly illustrates the details.



Source: American Samoa, Department of Commerce

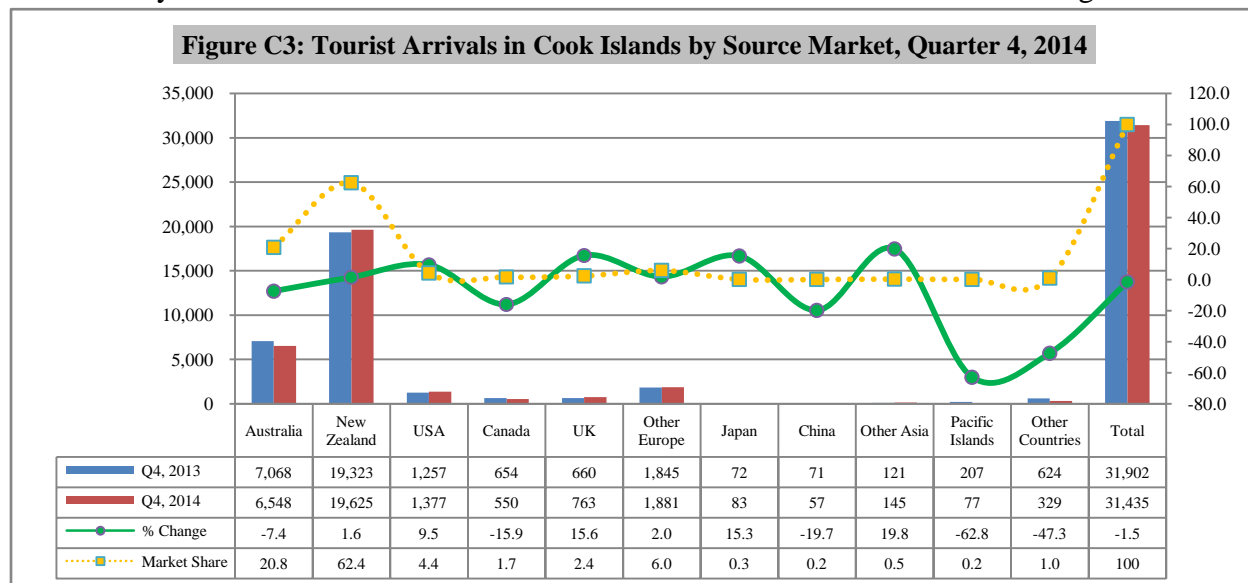
During this period, the bulk of the tourists to American Samoa were there to visit friends and relatives (VFR) and represented 43.5% share. The remaining 56.5% were shared between Leisure/holiday (30.3%), Business (23.8%) and the classification Other Purposes (2.4%). Details are shown in Figure C2 below.



Source: American Samoa Department of Commerce

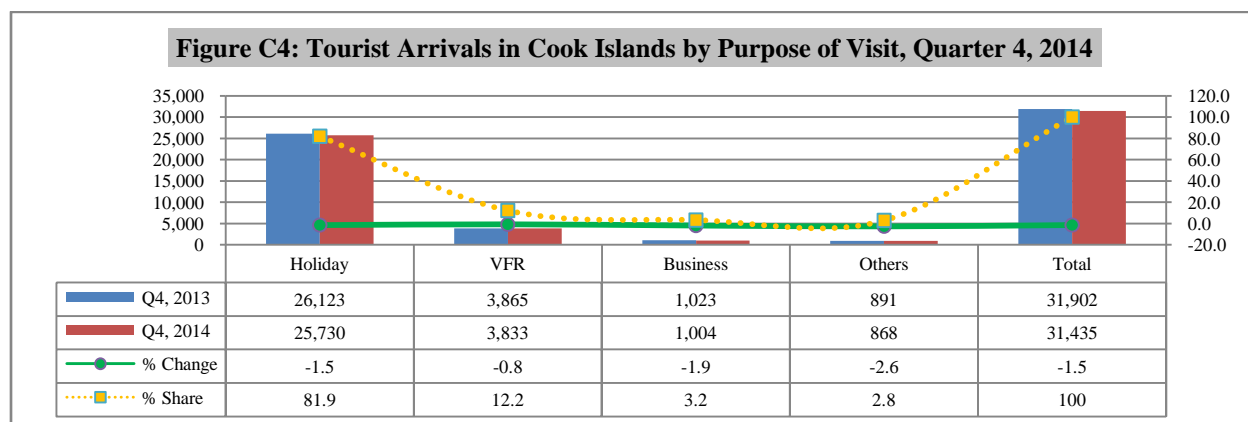
Cook Islands

During the period under review, the classification Other Asia recorded the highest percentage growth of 19.8% (24 in absolute terms). Other source markets that registered positive growths were New Zealand (1.6%), USA (9.5%), UK (15.6%), Other Europe (2%) and Japan (15.3%). All other markets including Australia slumped. Overall, the total visitor arrivals for this period declined by 1.5% when compared to the same period in 2013. New Zealand remains the country's single major source market making up 62% of the total tourist traffic to Cook Islands. This is followed by Australia with a market share of some 21%. Details shown in Figure C3 below.



Source: Cook Islands Ministry of Finance and Economic Management

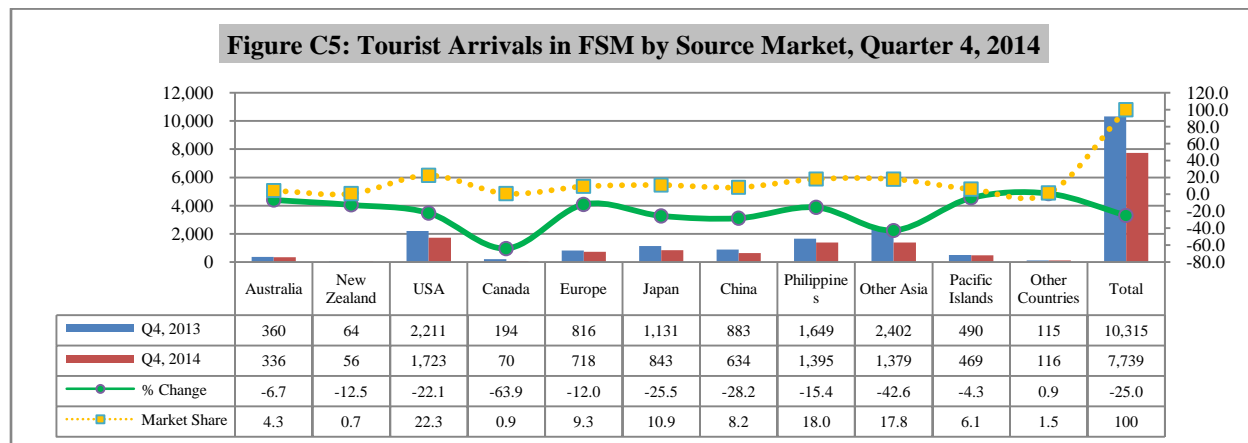
Analysis by purpose of visit showed all categories of purpose of visit declined during this review period. In terms of percentage share and characteristic of the island nation's tourism, most (81.9%) of the visitors were leisure/holidaying tourists, 12.2% were VFRs and business 3.2% and the remaining 2.8% - others.



Source: Cook Islands Ministry of Finance and Economic Management

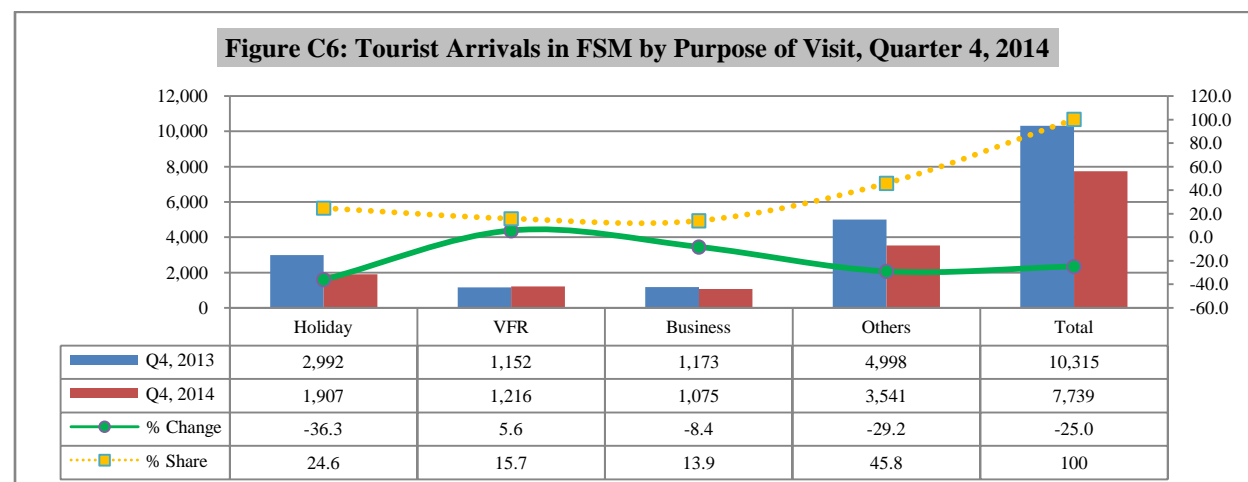
Federated States of Micronesia

During quarter 4 2014, the USA continues its dominance as the single major source market for this island nation accounting for 22% of the total tourist traffic. Consistent with past performances, Other Asia, Philippines, Japan and China together accounted for over half (54.9%) of the total tourists traffic. The remaining 45.1% comprised tourist arrivals from other markets. Overall all markets registered losses except for the classification ‘Other Countries’ which recorded a mere 0.9% growth. Figure C5 below clearly illustrates the details.



Source: Office of Statistics, Budget and Economic Management, Overseas Development Assistance and Compact Management (SBOC)

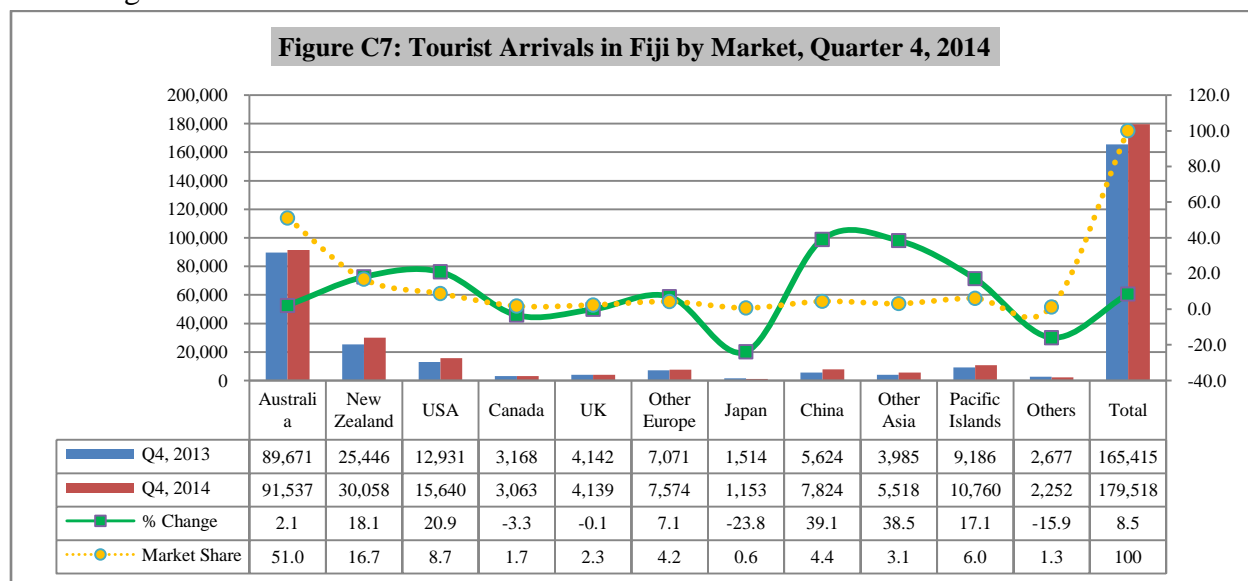
By purpose of visit, only VFR recorded a positive growth of 5.6% during this period. The Leisure/Holiday component took a dip of 36.3%, while Business and Other Purposes also declined but at a relatively slower rate of 8.4% and 29.2% respectively. As can be seen in C6 below, leisure/Holiday tourists accounted for 24.6%, VFR (15.7%) and Business (13.9%) while the classification ‘Other Purposes’ accounted by a higher 45.8% percentage share. Figure C6 below clearly indicates the details.



Source: Office of Statistics, Budget and Economic Management, Overseas Development Assistance and Compact Management (SBOC)

Fiji

The single major source market for Fiji is Australia and represented 51% of the total tourist traffic. This market grew at 2.1% over the same period of the previous year. New Zealand maintained its position as the second largest market for Fiji with 16.7% percentage share, USA represented by 8.7% with the Pacific Islands recording 6%. Other markets accounted for less than five percent each. In terms of growth, China recorded the highest growth of 39.1% when compared to the same quarter the previous year. Australia, New Zealand, USA, Other Europe, China, Other Asia and Pacific Islands all recorded positive growths respectively while the remaining markets declined.



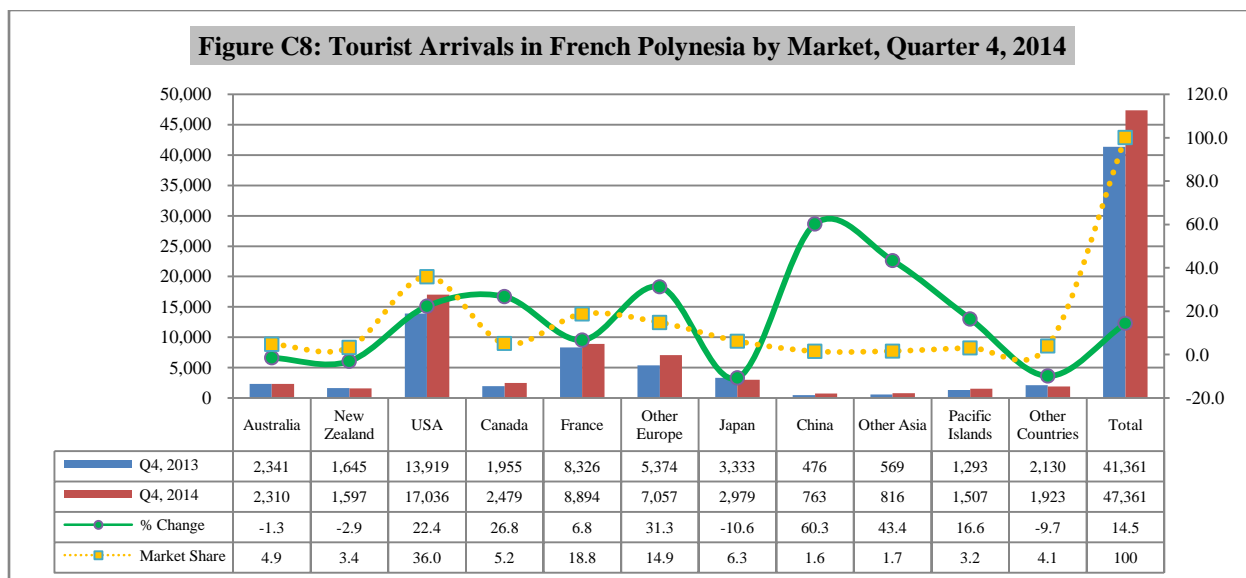
Source: Fiji Bureau of Statistics

Data on Fiji's Purpose of Visit were unavailable.

French Polynesia

In Quarter 4, 2014, a total of 47,361 tourists visited French Polynesia. This represents a 14.5% increase from the same quarter in 2013. China recorded the highest percentage growth at 60% while other source markets that registered strong growths include USA, Canada, Other Europe, Other Asia and Pacific Islands. Australia, New Zealand and Japan all registered declines in this period. Details are clearly shown in Figure C8 below.

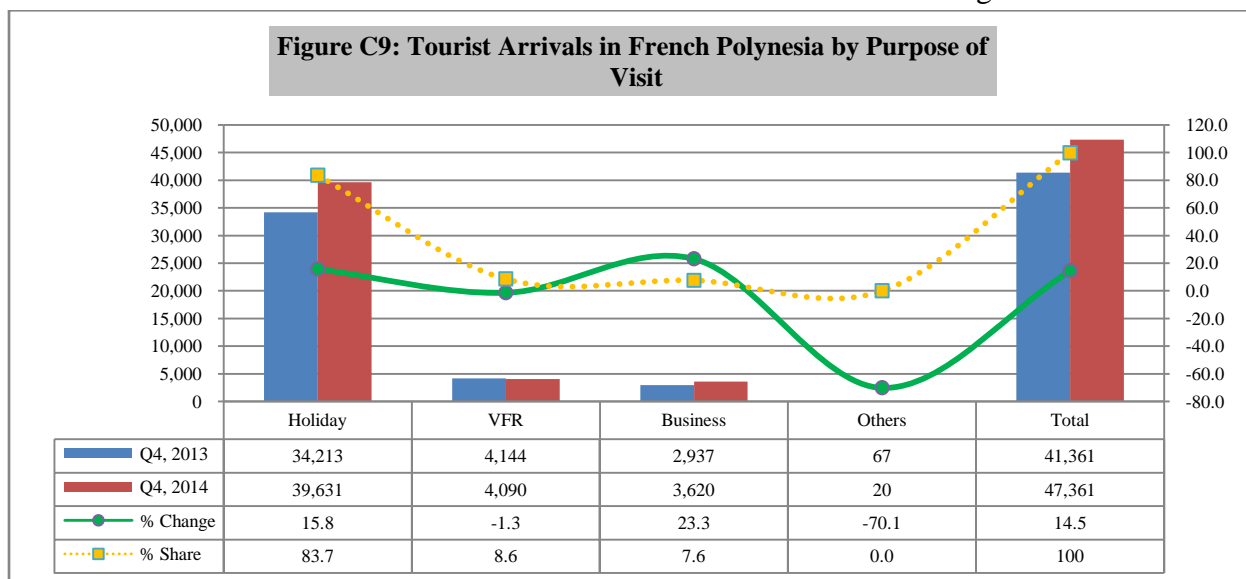
Figure C8: Tourist Arrivals in French Polynesia by Market, Quarter 4, 2014



Source: Institut de la Statistique de la PolynesieFrancaise

Analysis by purpose of visit reveals that majority of the tourists visited French Polynesia for holiday purposes, representing 83.7% of the total tourist traffic. The remaining 16.3% were shared between VFR, business and others. The holiday and business segments registered increases while there were declines in VFR and Others. Details shown in Figure C9 below.

Figure C9: Tourist Arrivals in French Polynesia by Purpose of Visit



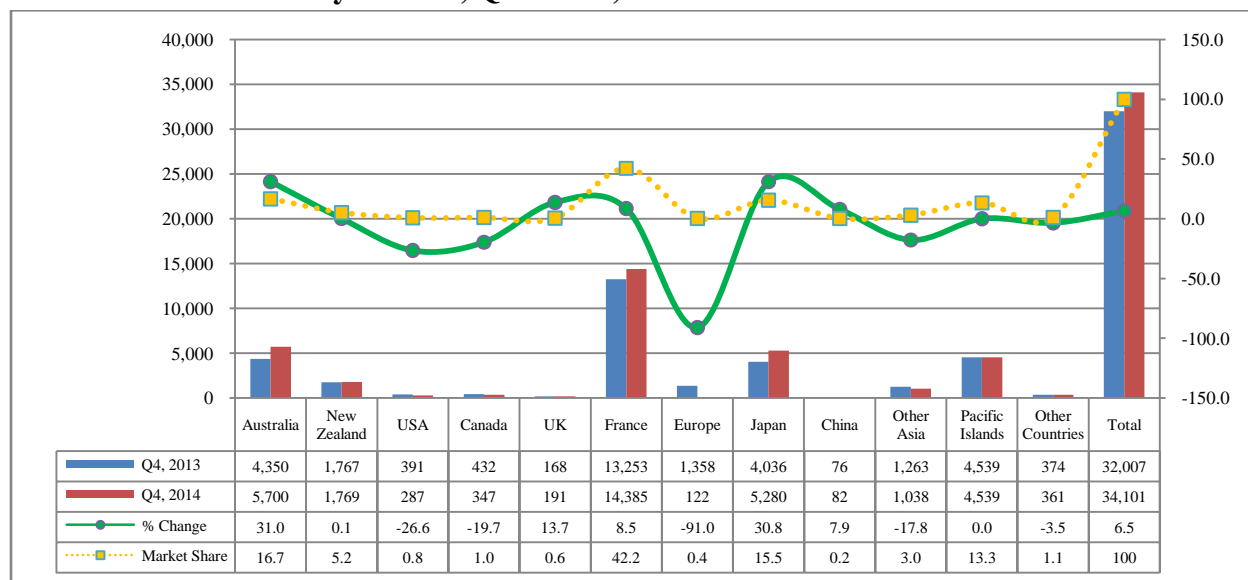
Source: Institut de la Statistique de la PolynesieFrancaise

New Caledonia

During the quarter under review, 34,101 tourists visited New Caledonia, representing a 6.5% growth in the same period in 2013. Attributable to this increase were Australia (31%), Canada (13.7%), Europe (30.8%) and China (7.9%).France continued to be the dominant market for New Caledonia with 42.2% of the total tourist traffic in this period. In comparison to quarter 4, 2013, France recorded an 8.5% growth. Similarly, all other markets registered positive growths with

the exception of USA (down by 26.6%), Canada (down by 19.7%), Europe (down by 91%), Other Asia (down by 17.8%) and Other Countries (down by 3.5%).

C10: Tourist Arrivals by Market, Quarter 4, 2014

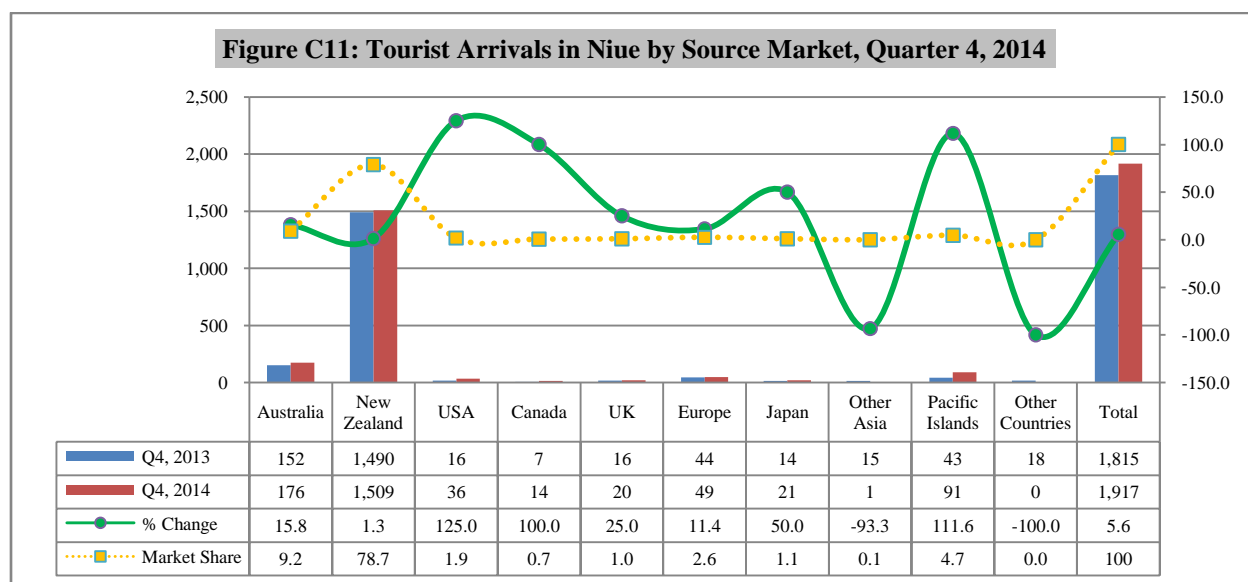


Source: Institut de la Statistique et des Etudes Economiques, Nouvelle-Calédonie

No attempt has been made to analyze tourist arrivals by purpose of visit as the figures do not tally with tourist arrivals by market.

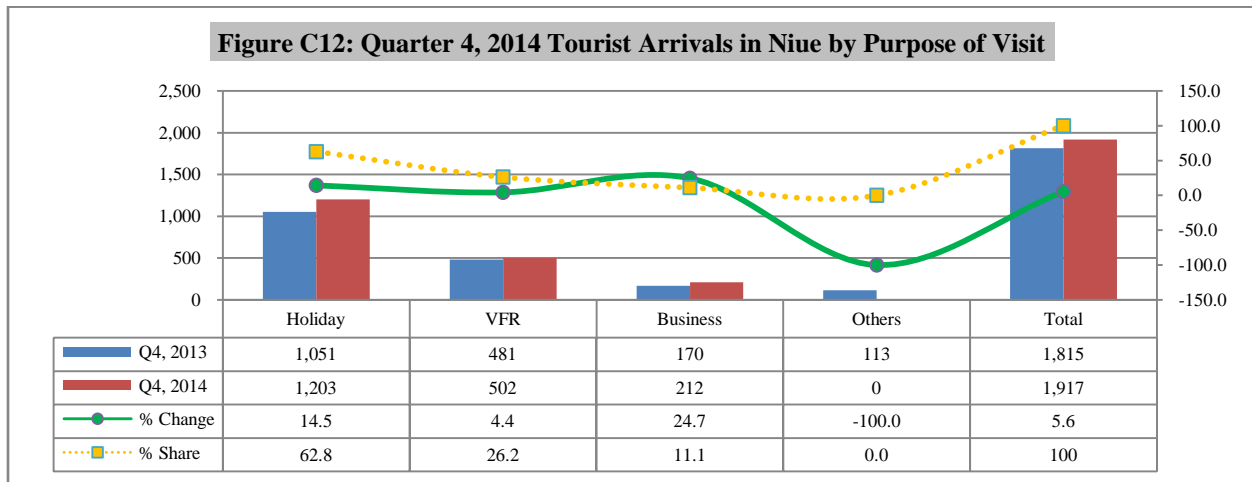
Niue

In this quarter, 1,917 tourists visited Niue and this marks a 5.6% growth as compared to the same period in 2013. New Zealand maintained its dominance as the major source market for this tiny island nation with 78.7% market share. All markets registered positive growths except for Other Asia and the classification “Others” which both declined. Details shown in Figure C11 below.



Source: Statistics Niue

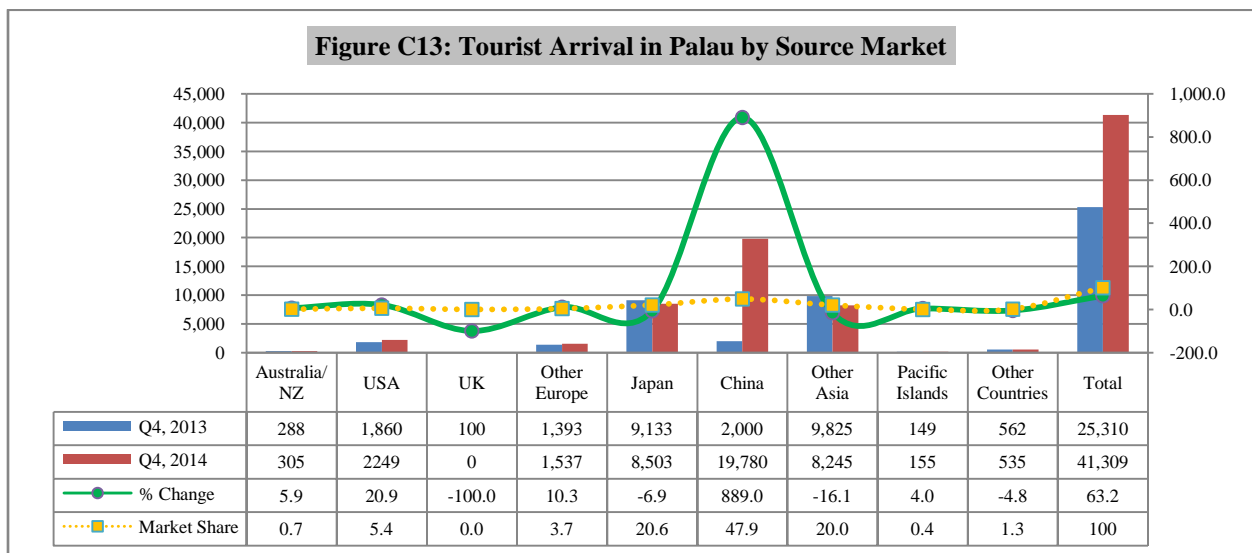
Holidaying/leisure tourists dominated visitor arrivals to Niue during the period under review making up 62.8% of the total tourists traffic. VFR and Business recorded 26.2% and 11.1% respectively. Figure C12 below provides the details.



Source: Statistics Niue

Palau

In Quarter 4, 2014, Palau recorded a remarkable performance of 63.2% growth. Attributable to this high performance was China's 889% growth (17,780 in absolute terms). This significant increase is due to recent direct charter services between the country and its markets of Hong Kong with Dynamic Airways, Asian Air, Palau Pacific Air and Mega Maldives. Asian tourists dominate the Palau destination and accounts for 88.5% of the total tourist traffic in this period. All markets recorded positive growths except for UK, Japan, Other Asia and Others which registered declines. Details are shown in Figure C13 below.

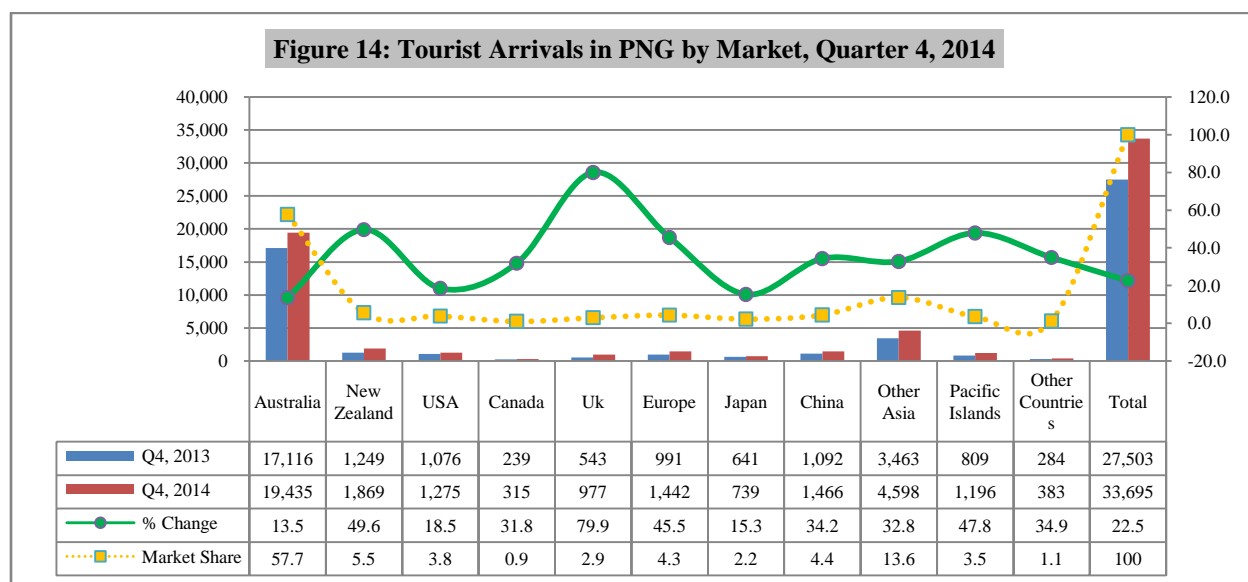


Source: Palau Visitors Authority

NB: Palau's data on Purpose of Visit not available.

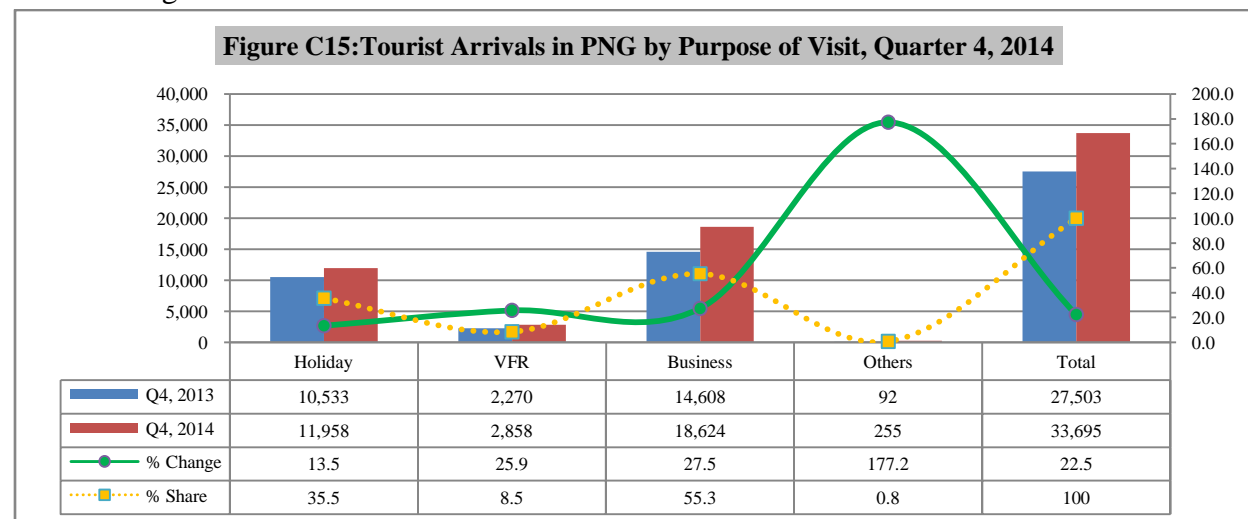
Papua New Guinea

Characteristics of PNG's tourism arrivals, nearby Australia dominated visitor arrivals in PNG recording more than half (57.7%) of the total tourist traffic during this quarter. In comparison to the same period in the previous year, all markets registered positive growths led by Australia, China and the other remaining markets. Overall, there was 22.5% increase in the number of tourists in comparison to Quarter 4, 2013. The highest percentage growth was recorded by the UK at 79.9% with the lowest growth accounted for by Australia (13.5%). Details are illustrated in Figure C14 below.



Source: PNG Tourism Promotion Authority

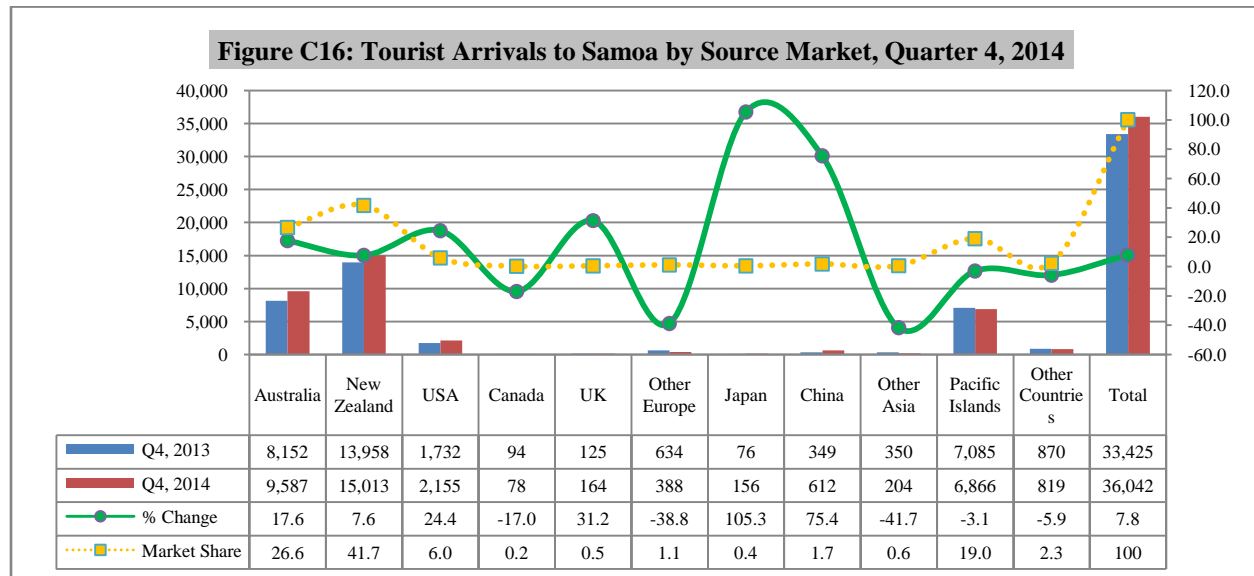
Analysis by purpose of visit reveals the majority of visitors to PNG during this quarter were visiting PNG for business and conference purposes (55.3%). Holidaying tourists only accounted for 35.5% while VFR represented 8.5%. When compared to the same quarter of the previous year, all classifications recorded positive growths, with overall growth of 22.5%. Details are shown in Figure C15 below.



Source: PNG Tourism Promotion Authority

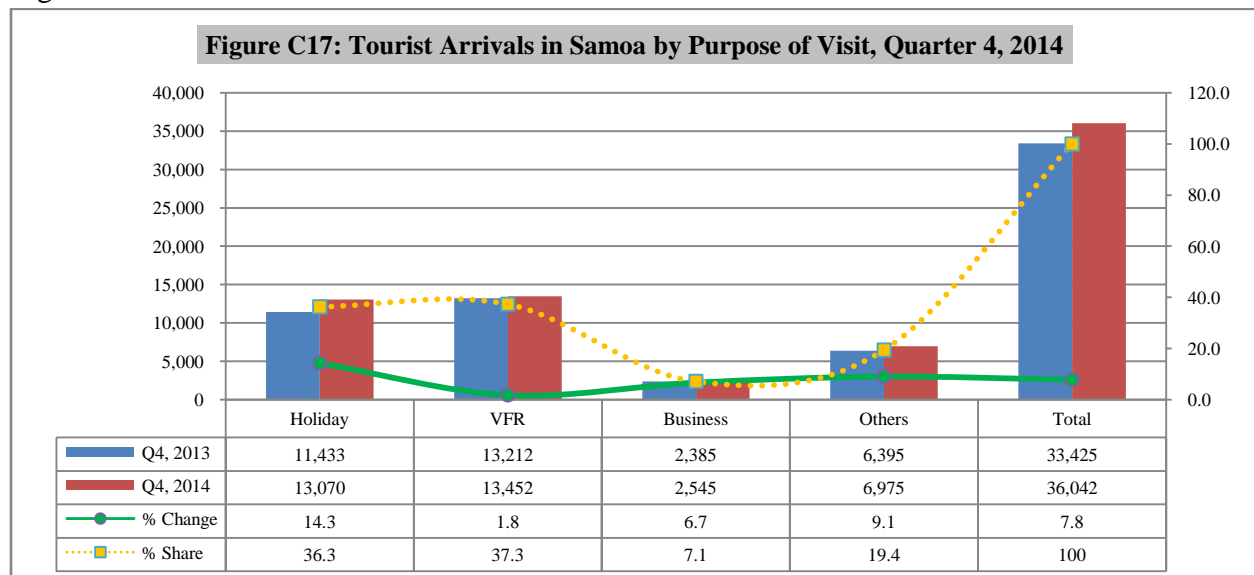
Samoa

Samoa recorded 7.8% growth in quarter 4, 2014 with New Zealand continuing to be the country's dominant market accounting for 41.7% of total tourist traffic, followed by Australia with a market share of 26.6%. All markets registered growth during this period except for Canada (down by 17%), Other Asia (down by 41.7%), Pacific Islands (down by 3.1%) and Other Countries (down by 5.9%). Japan marked the highest percentage growth of 105.3%. Details shown in Figure C16 below.



Source: Samoa Bureau of Statistics

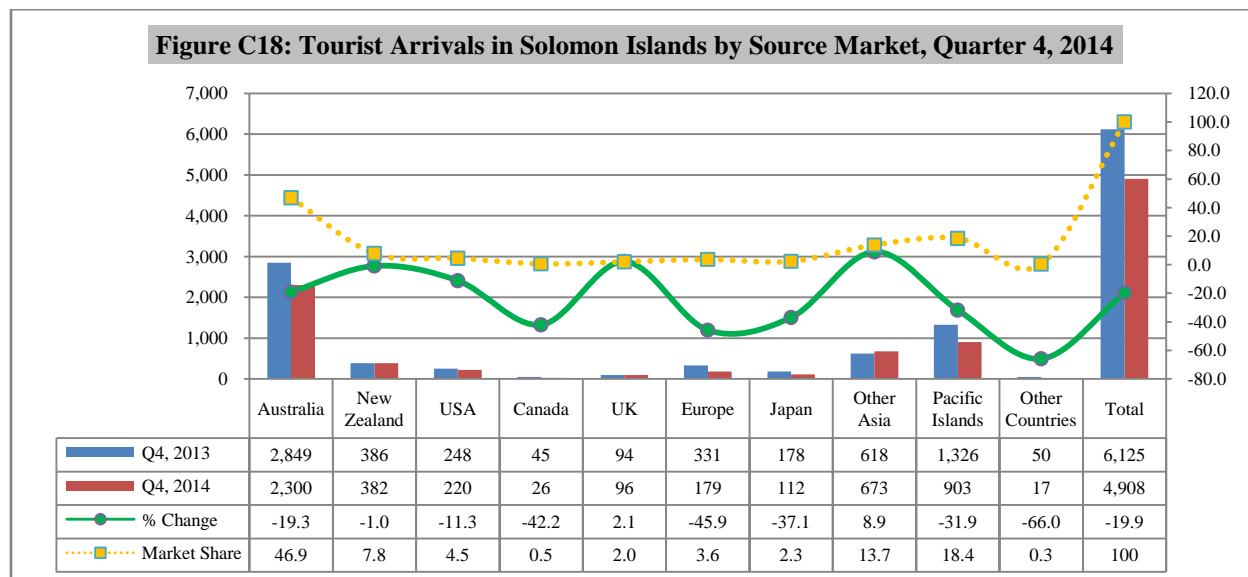
By purpose of visit most of those who visited Samoa during this quarter under review were VFRs, representing 37.3% of the total tourist traffic. This was followed by leisure/holiday representing 36.3% while Business and Others accounted for 7.1% and 19.4% respectively. Figure C17 below shows the details.



Source: Samoa Bureau of Statistics

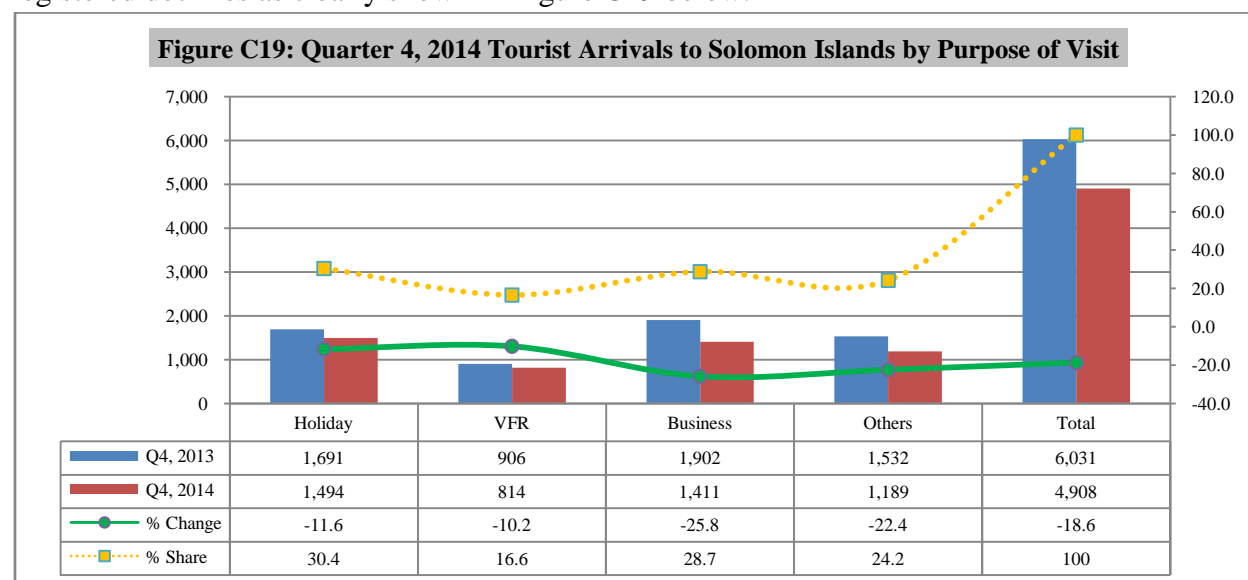
Solomon Islands

In Quarter 4, 2014, a total of 4,908 tourists visited the Solomon Islands, representing a 19.9% decline as compared to the same period in the previous year. Only two markets recorded positive growths; Other Asia (8.9%) and the UK (2.1%). The remaining markets registered depressing performance with Europe recording the highest decline of 45.9%. The decline in tourist arrivals during this period could be attributable to the general elections held in November and the negative reporting in the media of the effects of the flooding that devastated Honiara and reported lost of lives. Details are illustrated in Figure C18 below.



Source: Solomon Islands National StatisticsOffice

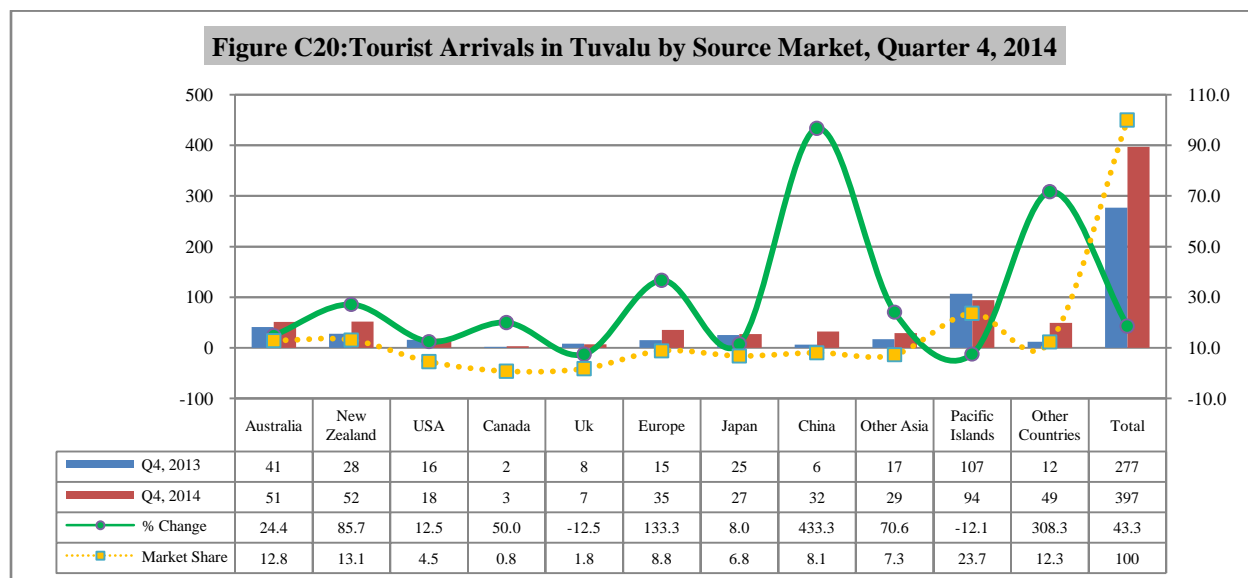
Analysis by purpose of visit reveals that the majority of tourists to Solomon Islands were visiting for holidaying purposes (30.4%), closely followed by business, 28.7%. Other purpose of visits, VFR, accounted for 16.6% and Others (24.2%). In terms of growth, all purposes of visit registered declines as clearly shown in Figure C19 below.



Source: Solomon Islands National Statistical Office

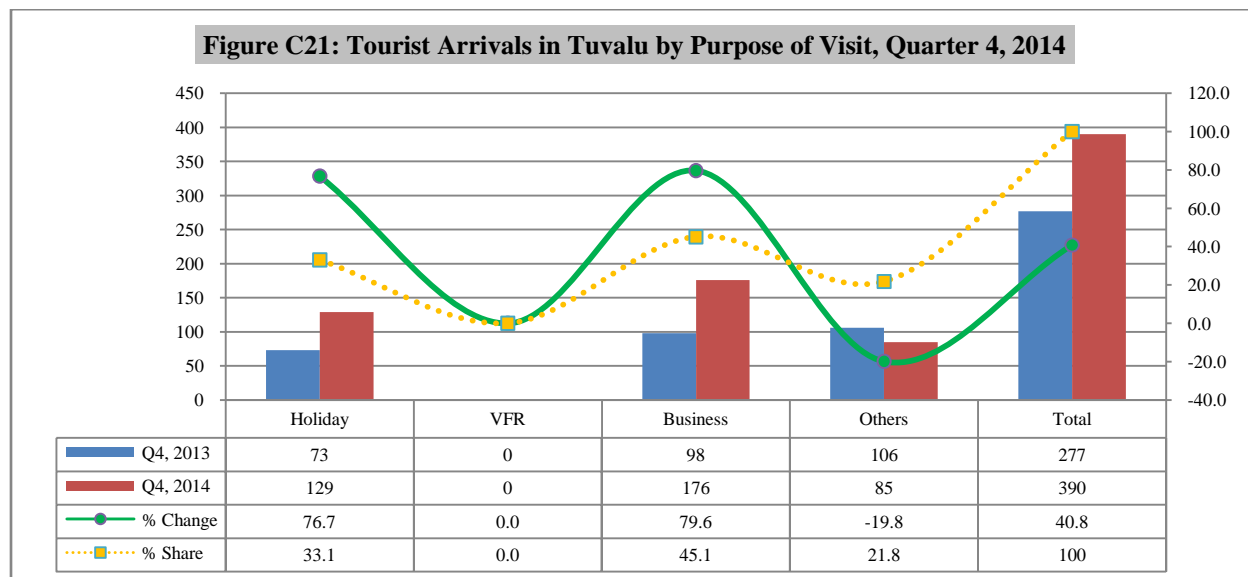
Tuvalu

In Quarter 4, 2014, 397 tourists visited Tuvalu, representing an increase of 43.3% when compared to the same period in the previous year. Overall, all markets registered growths except for the UK and the Pacific Islands. Figure C20 below illustrates the details.



Source: Tuvalu Department of Tourism

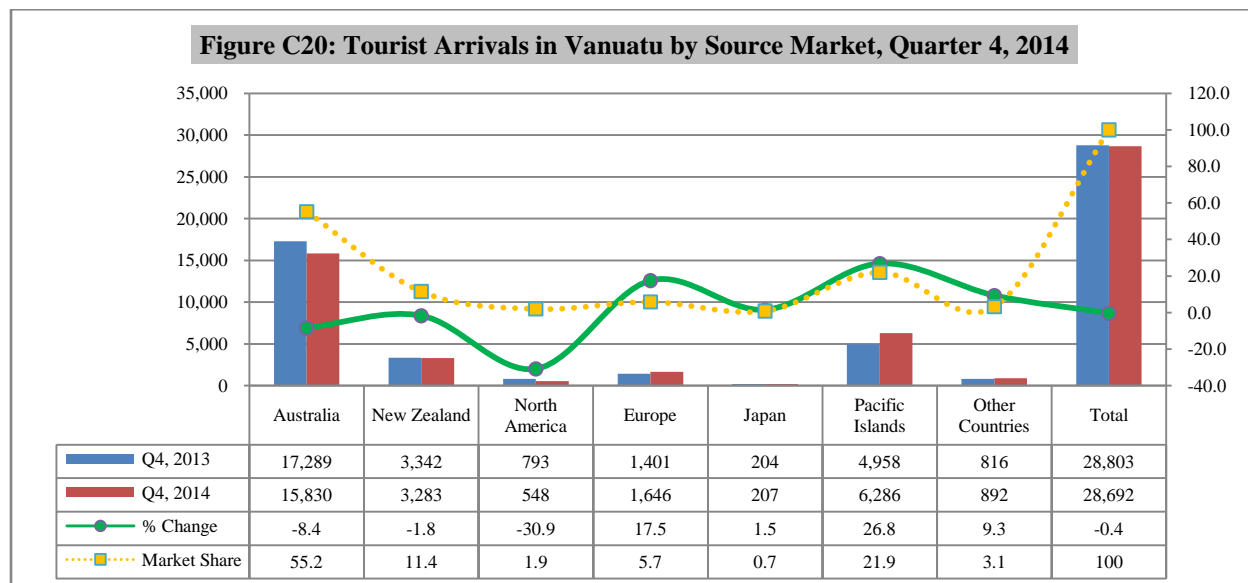
Analysis by purpose of visit reveals that business travellers dominated tourist traffic during this quarter and accounted for 45.1%. This was followed by leisure/holiday (33.1%) and others (21.8%). VFR was not separately captured but was bundled under the Others category. Details shown in Figure C21 below.



Source: Tuvalu Department of Tourism

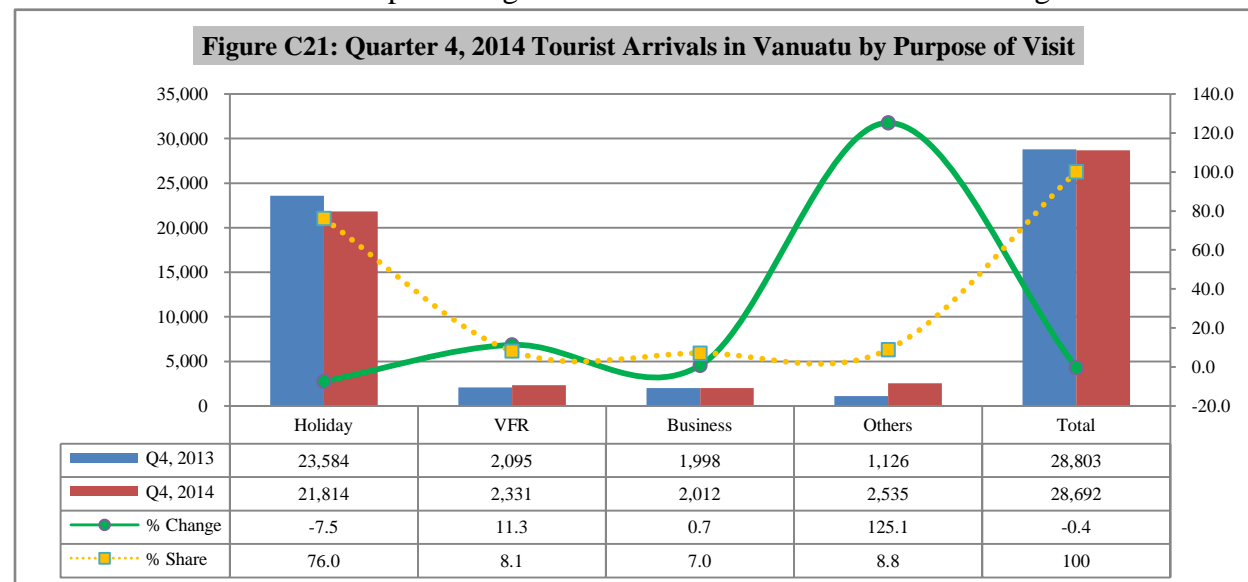
Vanuatu

During the period under review, 28,692 tourists visited Vanuatu and this marked a slight decline of 0.4%. Australia continued its dominance as the single major source market and accounted for a market share of 55.2% during this quarter. However, the Australian market together with New Zealand and North America all registered declines as compared to the same period in 2013 for reasons believed to be connected to disruptive Air Vanuatu flights, especially between Australia and Vanuatu. The remaining markets all had positive growths with Pacific Islands recording the highest growth of 26.8%. Details are shown in Figure C22 below.



Source: Vanuatu National Statistics Office

Analysis by purpose of visit reveals that 76% of tourists visited Vanuatu for leisure purposes. However, this segment marked a 7.5% decline in comparison to quarter 4, 2013. The remaining three classifications all had positive growths and details are illustrated in Figure C23 below.



Source: Vanuatu National Statistics Office

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South Pacific Tourism

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