



PACIFIC TOURISM
ORGANISATION

2022 ANNUAL VISITOR ARRIVALS SNAPSHOT



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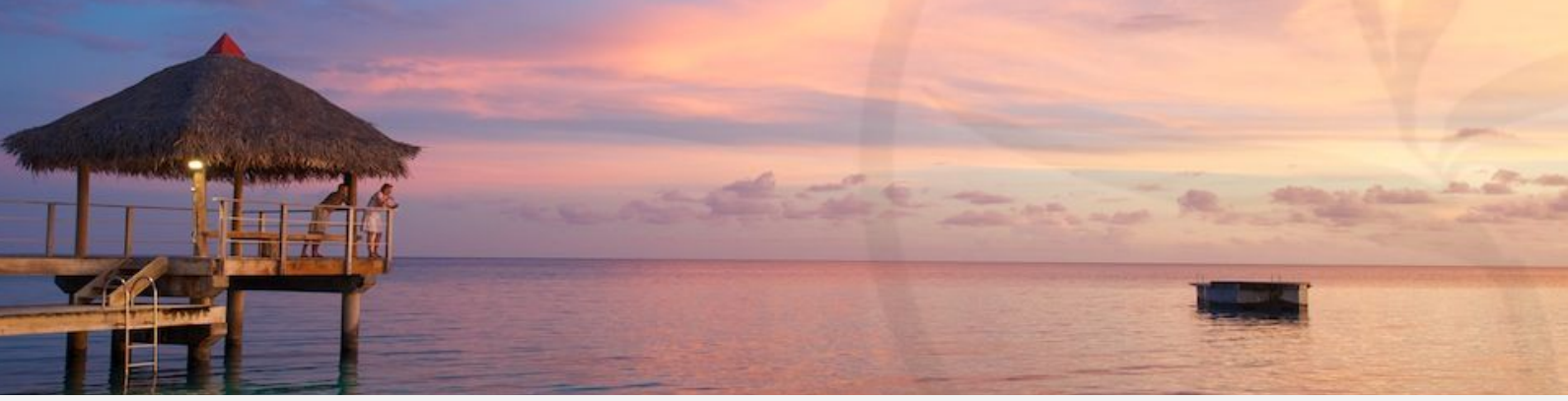
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2022 ANNUAL GLOBAL TOURISM PERFORMANCE OVERVIEW

The COVID-19 pandemic ended a decade of continuous growth for Travel & Tourism, as the sector's total contribution to global GDP fell by almost US\$ 4.9 trillion in 2020 while 62 million jobs were lost. 2021 provided relief as the sector's global economic contribution rebounded by 21.7% and it recovered 18.2 million jobs.

In 2022, demand for international travel returned strongly, as governments around the world loosened COVID-related travel restrictions. For instance, the number of international overnight arrivals is expected to have doubled (109% annual growth) compared to 2021 – reaching 62% of 2019 volumes.

Zooming in on specific countries, the picture in 2022 was more complex. Some countries removed their travel restrictions, while in other markets, notably China, they remained in place. Southeast Asia, for instance, is estimated to have seen a strong return of international traveler numbers, but in Northeast Asia, recovery was slower, with South Korea and Japan reopening its borders in the second half of the year.

There is optimism about the recovery of Travel & Tourism to pre-pandemic levels in 2023. The return of trends like longer booking windows, with trips planned well in advance. The expected return of Chinese travelers to global destinations following the easing of COVID-19 restrictions should further boost global demand. The revival of city travel, may be signs of a return to normality.

Future shocks should not be discounted. The sector faces a number of challenges, including high inflation, which can eat away at travelers' disposable income; geopolitical shocks, such as the Russia-Ukraine conflict; staff shortages and capacity constraints. A possible resurgence of COVID-19, and the associated re-emergence of travel restrictions, should not be overlooked either.

Based on UNWTO's scenarios for 2023, international tourist arrivals could reach 80% to 95% of pre-pandemic levels this year, with Europe and the Middle East expected to reach those levels. However, important risks remain ahead, especially economic and geopolitical.

Tourists are expected to increasingly seek value for money and travel close to home in response to the challenging economic environment.

Visitor Arrivals to SPTO member countries stood at 1,359,759 which marked a substantial 760% rise over 2021. 1,224,329 arrived by Air and 135,430 arrived by cruise ships. Although all member countries have opened their borders, statistics for visitor arrivals have been slow in collecting and disseminating between NTOs and NSOs.

By destination shares, Fiji accounted for 52.0% of the total air visitor arrivals to the region, with French Polynesia at 17.9%, Cook Islands at 9.3%, New Caledonia 6.4%, PNG 5.7% and the remaining 8.8% is made up of Samoa 3.8%, Vanuatu 2.4%, Tonga 1.5%, Solomon Islands 0.6%, FSM 0.2% and Kiribati & RMI 0.1%.

New Caledonia accounted for 45.7% of the total cruise visitor arrivals, followed by French Polynesia at 32.3%, Fiji at 12.0% and the remaining 10.0% is made up of Samoa (5.0%), Tonga (3.8%) and Cook Islands (1.2%).

Source: World Travel & Tourism Council - Consumer Trends Report 2023
: World Tourism Barometer January 2023



GLOBAL TRAVEL TRENDS & 2023 FORECAST

After a strong rebound in 2022, international tourism could climb close to pre-pandemic levels in 2023 driven by strong pent-up demand and the reestablishment of travel flows in most parts of the world, including the re-opening of several destinations and source markets in Asia, particularly China.

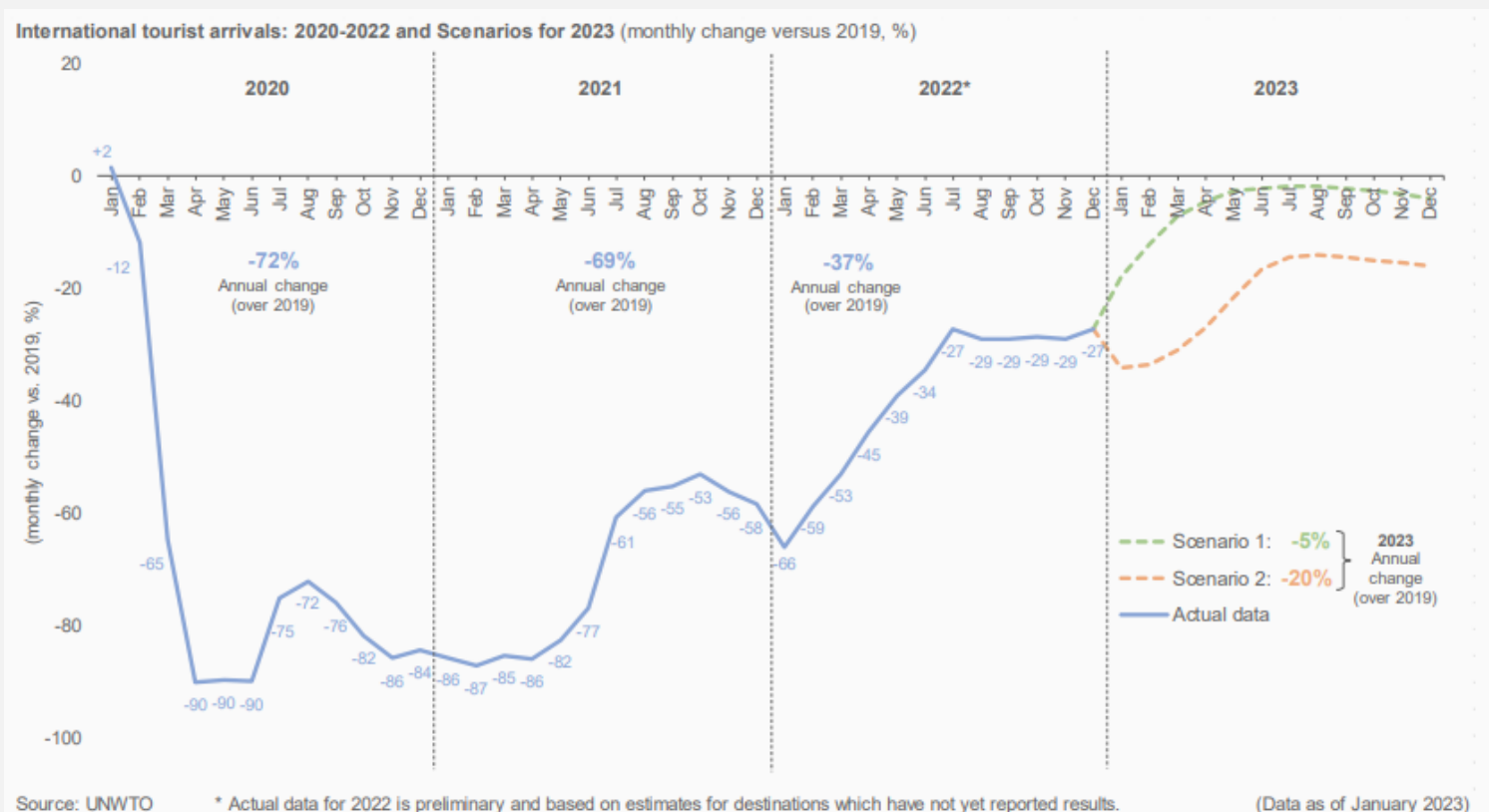
Some world regions could reach pre-pandemic levels in 2023, namely Europe and the Middle East, which recovered about 80% of their international visitors in 2022. The majority of UNWTO Panel Experts (65%) believe global arrivals will not return to pre-pandemic levels in 2024 or later, though 72% expect better tourism performance in 2023 than in 2022.

The complete recovery remains subject to certain risks like a potential economic slowdown amid high inflation and rapid interest hikes, which have increased financial costs and debt levels. Global output could drop from 3.0% in 2022 to 1.9% in 2023 with many economies at risk of falling into recession, according to the World Economic Situation and Prospects 2023.

Higher food and energy prices result in lower purchasing power and weaker consumer confidence, which could weigh on travel demand in 2023, specially in terms of spending. Travelers may increasingly seek value for money and take trips closer to home in response to the challenging economic environment. The Russian offensive in Ukraine and geopolitical tensions in North-East Asia could also disrupt the normalization of travel.

Two forward-looking scenarios for international travel have been outlined by UNWTO for 2023 based on possible evolving circumstances and speeds of recovery.

- ❑ **Scenario 1** (baseline) assumes the almost complete normalization of international travel in 2023, including the opening of Asian destinations and source markets which remained closed in 2022. The recovery would be supported by strong traveler confidence and unleashed pent-up demand, with only limited impact from the economic slowdown and little or no worsening of geopolitical or health conditions, and no increase in travel restrictions. This scenario points to international arrivals worldwide climbing to 95% of 2019 numbers, meaning an almost complete recovery of pre-pandemic levels.
- ❑ **Scenario 2** (downside) assumes a somewhat weaker recovery due to slower lifting of travel restrictions in Asia, including stricter conditions for travel from China in some destinations. This outlook also considers a larger impact from the global economic slowdown, with a sizeable drop in purchasing power due to persistent inflation and a decline in consumer confidence. According to this scenario, international arrivals would still remain 20% below 2019 levels in 2023.

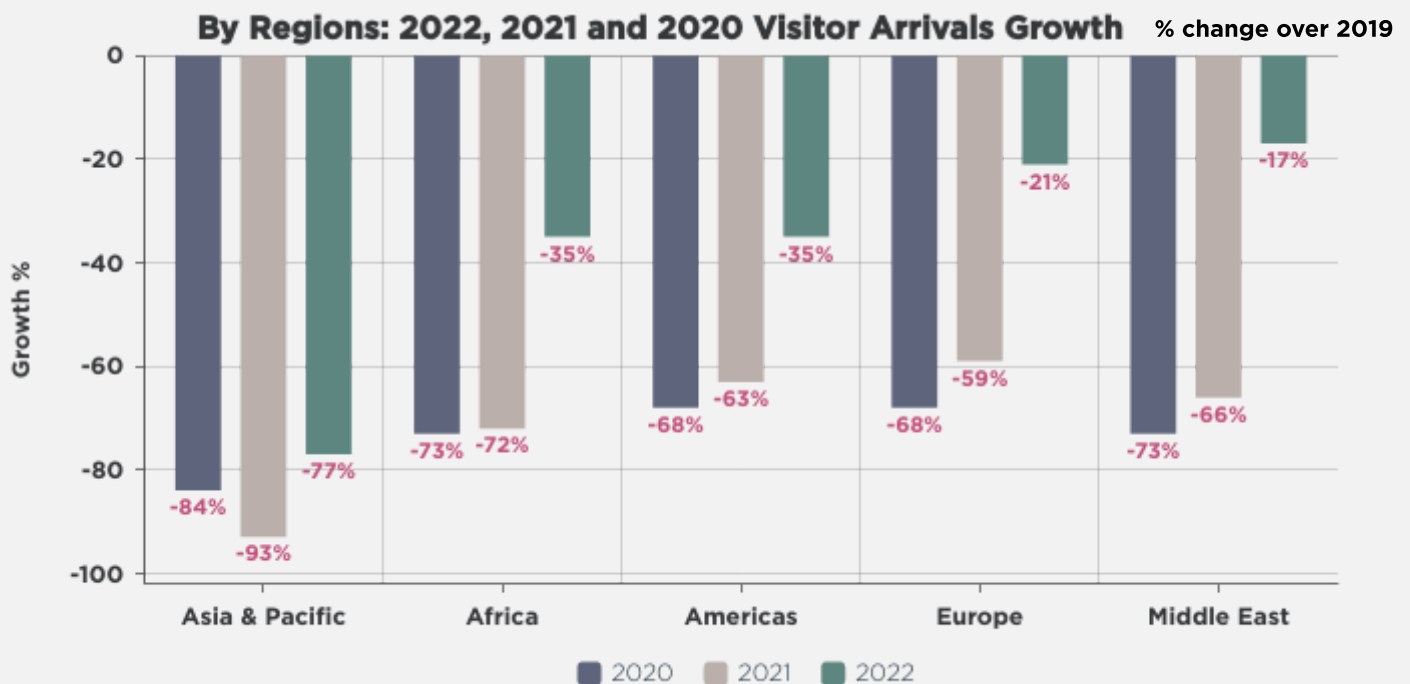
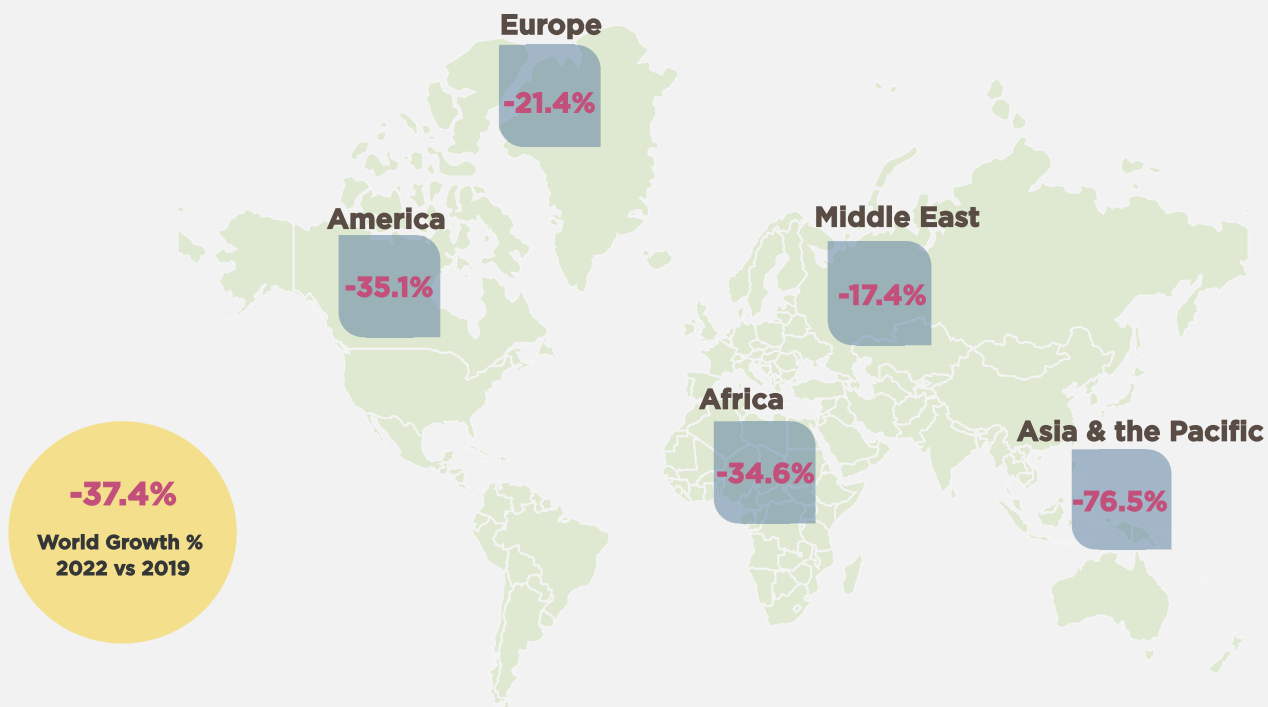


Source: UNWTO Barometer January 2023



GLOBAL TOURISM PERFORMANCE 2022

2022 International Tourist Arrivals Growth By Region Pre-Covid - 2019 Base Year



Source: UNWTO Barometer January, 2023

GLOBAL TOURISM ECONOMIC IMPACT

GPD contribution



**US\$7.7
Trillion**

Global Tourism contribution to the worlds GDP increased by 22% from 2021 and 23% below 2019 level

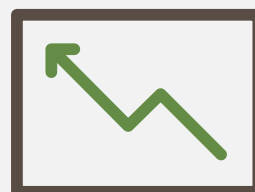
Employment



**22m new
Jobs**

Representing a 7.9% increase on 2021 and only 11.4% below 2019

Visitors spending



**81.9%
Rise**

Increase in International visitor spending compared to 2022 but still 40.4% behind 2019 numbers

Pacific Destinations 2022

Total Visitor Arrivals (Air)

1,224,329

Absolute Change

1,066,181

Percentage Change

674%

Breakdown of Pacific Island Destinations 2022

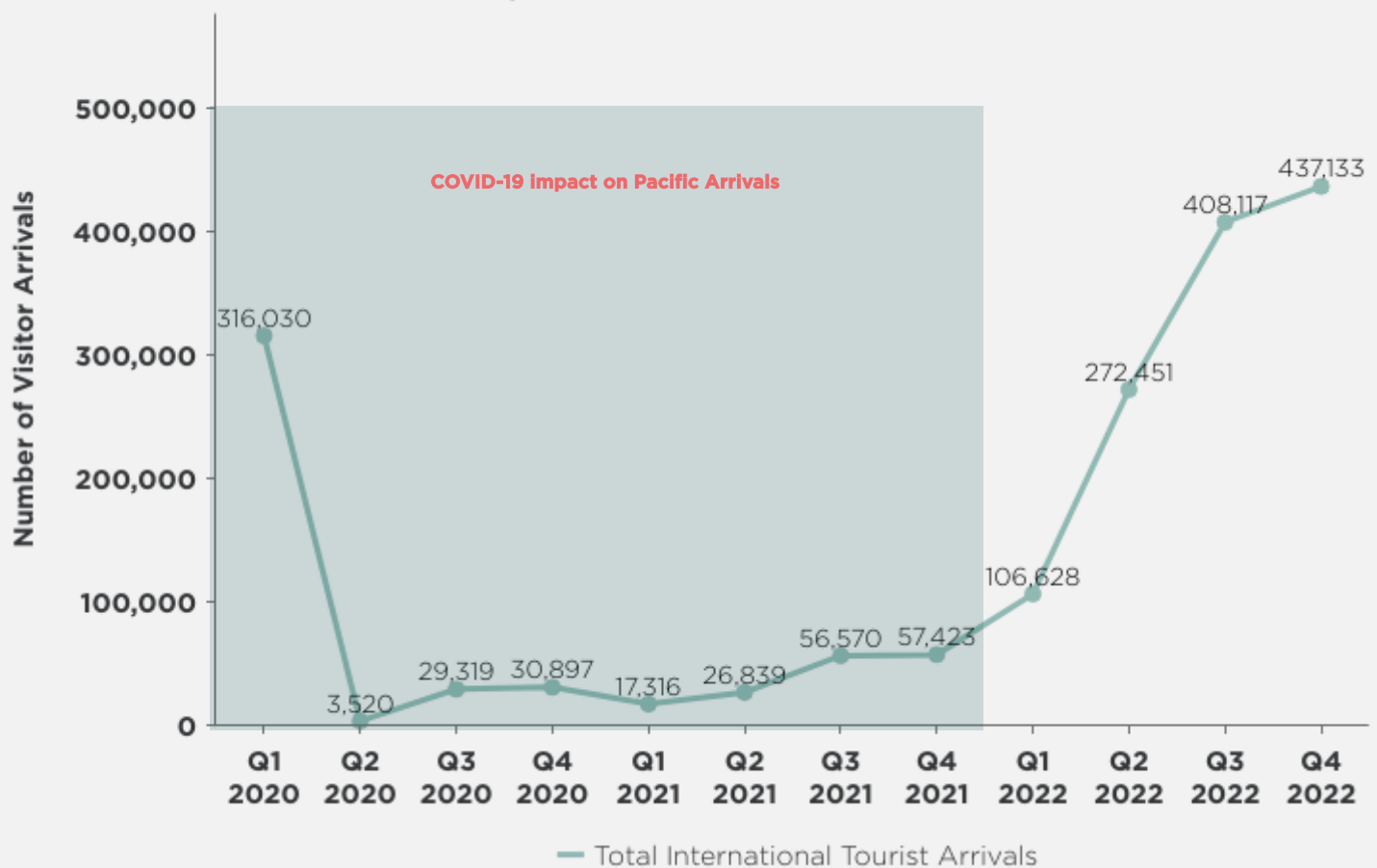
PACIFIC ISLAND DESTINATIONS	2021 VISITOR ARRIVALS (AIR)	2022 VISITOR ARRIVALS (AIR)	ABSOLUTE CHANGE	% CHANGE
American Samoa	0	0	0	0%
Cook Islands	26,330	113,346	87,016	330%
FSM	0	1,978	1,978	0%
Fiji	31,618	636,312	604,694	1912%
French Polynesia	70,225	218,750	148,525	211%
Kiribati	34	1,770	1,736	5106%
Marshall Islands	0	1,346	1,346	0%
Nauru	0	20	20	0%
New Caledonia	12,446	78,641	66,195	532%
Niue	-	-	-	-
PNG	16,758	70,123	53,365	318%
Samoa	0	47,059	47,059	0
Solomon Islands	737	7,365	6,628	899%
Timor Leste	0	0	0	0%
Tonga	0	18,417	18,417	0%
Tuvalu	0	59	59	0%
Vanuatu	0	29,143*	29,143	0%
Wallis & Futuna	0	0	0	0%

Source: NTOs, NSOs and SPTO
* Denotes SPTO estimations



INTERNATIONAL VISITOR ARRIVALS (AIR) TO THE PACIFIC

January 2020 - December 2022



Breakdown of Annual Visitor Arrivals: 2020 - 2022

QUARTERS	2020	2021	2022	% CHANGE 2022 VS 2021
March	316,030	17,316	106,628	516%
June	3,520	26,839	272,451	915%
September	29,319	56,570	408,117	621%
December	30,897	57,423	437,133	661%

Source: NTOs, NSOs and SPTO



TOTAL VISITOR ARRIVALS (AIR&CRUISE) BY PACIFIC GROUPINGS 2022

Melanesia

*Fiji, New Caledonia,
PNG, Solomon Islands,
Vanuatu*



2021 - 61,559

2022 - 901,266



1,364%

Polynesia

*Cook Islands, French Polynesia, Samoa,
Tonga, Tuvalu*



2021 - 96,555

2022 - 456,024



372%

Pacific Sub-Regions Total



2021 - 158,148

2022 - 1,363,404



761%

Micronesia

*FSM, Kiribati, Marshall Islands,
Nauru*



2021 - 34

2022 - 5,114



14,941%

Other

Timor Leste



2021 - 0

2022 - 0



0 %

TOTAL VISITOR ARRIVALS (AIR & CRUISE)

2022

1,362,404

Total Visitor Arrivals
2022

Total Air Visitor Arrivals
2022

1,224,329

Total Cruise Visitor Arrivals
2022

138,075

2022 Annual

against

2021 Annual

1,204,256

Absolute Change

158,148

Total Visitor Arrivals
2021

761%

Percentage Change

Breakdown of Total Visitor Arrivals

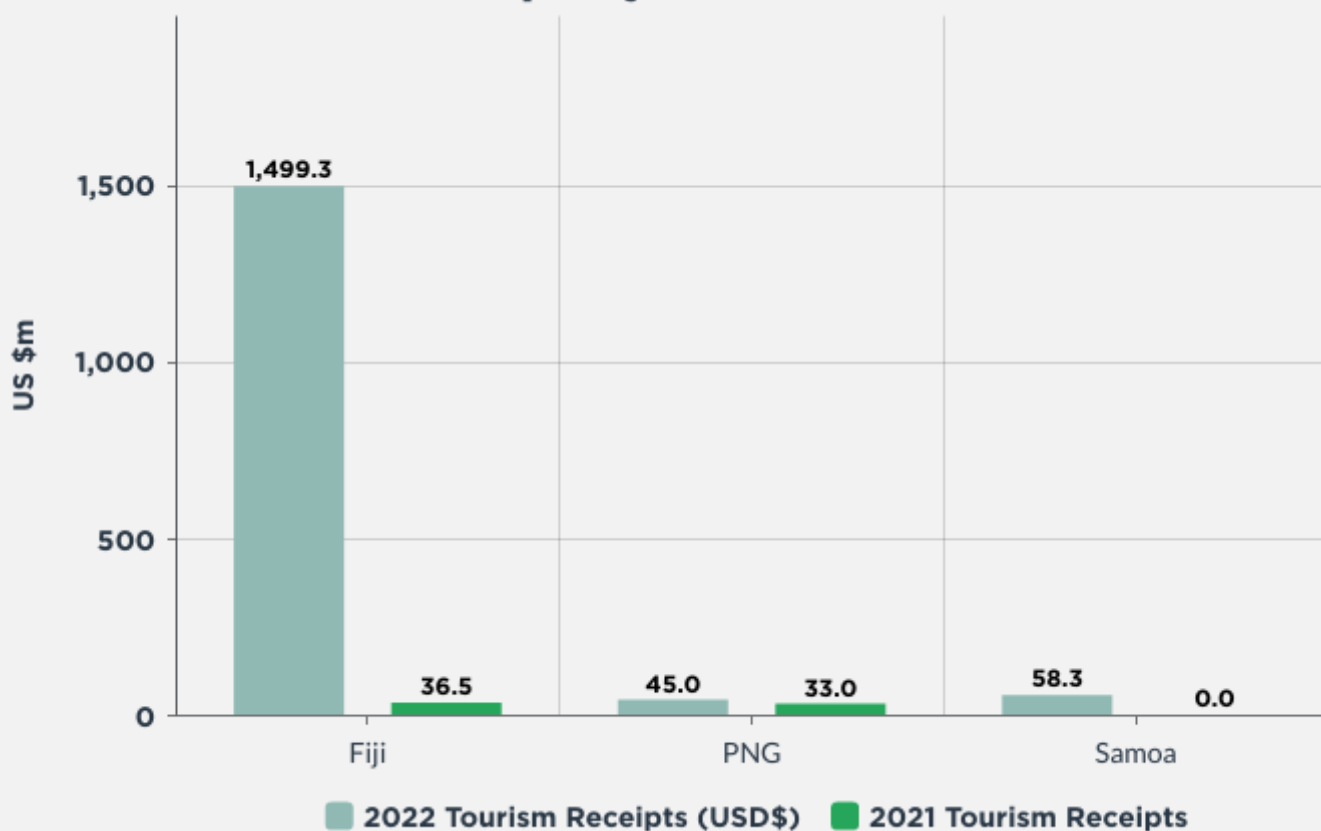
PACIFIC ISLAND DESTINATIONS	2022 VISITOR ARRIVALS (AIR)	2022 VISITOR ARRIVALS (CRUISE)	2022 VISITOR ARRIVALS (AIR + CRUISE)	% SHARE OF 2022 VISITOR ARRIVALS (AIR + CRUISE)
American Samoa	0	-	0	0%
Cook Islands	113,346	1,537	114,883	8%
FSM	1,978	-	1,978	0%
Fiji	636,312	15,863	652,175	48%
French Polynesia	218,750	42,610	261,360	19%
Kiribati	1,770	-	1,770	0%
Marshall Islands	1,346	-	1,346	0%
Nauru	20	-	20	0%
New Caledonia	78,641	60,371	139,012	10%
Niue	-	-	-	-
PNG	70,123	3,448	73,571	5%
Samoa	47,059	6,550	53,609	4%
Solomon Islands	7,365	0	7,365	1%
Timor Leste	0	0	0	0%
Tonga	18,417	7,696	26,113	2%
Tuvalu	59	-	59	0%
Vanuatu	29,143*	0	29,143*	2%
Wallis & Futuna	0	0	0	0%

Source: NTOs and NSOs
* Denotes SPTO estimation



TOURISM INSIGHT SNAPSHOT 2022

Tourist Receipts by Pacific Destinations



COUNTRIES	2021 TOURISM RECEIPTS \$USM	2022 TOURISM RECEIPTS \$USM	2022 TOURISM RECEIPTS AS & OF GDP
Fiji	36.5	1,499.3	271.0%
PNG	33.0	45.0	0.3%
Samoa	0.0	58.3	146.0%

Source: NTOs and NSOs

Only 3 member countries submitted the 2022 Tourism Receipts, rest of the NTOs reported that there is no data available



Average Length of Stay
13.5 nights

Breakdown by Pacific Destination

PACIFIC ISLAND DESTINATIONS	YEAR (LATEST UPDATE)	AVERAGE LENGTH OF STAY
American Samoa	2017	8.1
Cook Islands	2022	8.5
FSM	2019	9.0
Fiji	2022	11.8
French Polynesia	2022	17.1
Kiribati	2019	9.8
Marshall Islands	2016	18.5
New Caledonia	2022	21.9
Niue	2019	8.0
PNG	2022	15.0
Samoa	2022	8.4
Solomon Islands	2022	12.0
Timor Leste	2017	10.0
Tonga	2019	13.0
Vanuatu	2020	7.5

Source: NTOs, NSOs and SPTO

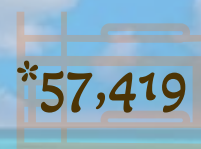
Tourism Accommodation



Total number of Accommodation



Total Number of Rooms



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	2022	622	3,018	7,598
FSM	2020	29	350*	480*
Fiji	2022	400	6,220*	14,786*
French Polynesia	2022	2,049	6,520	20,094
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	2021	278	638	909
Tuvalu	2016	10	50*	60*
Vanuatu	2021	200	1,548	2,290

Source: NTOs, NSOs and SPTO

** SPTO Estimates

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

DESTINATIONS	ANNUAL						2021				2022			
	2017	2018	2019	2020	2021	2022	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
American Samoa	19,987	20,221	19,237	748	0	0	0	0	0	0	0	0	0	0
Cook Islands	161,362	168,760	171,606	25,073	26,330	113,346	264	7,706	18,261	99	10,393	31,001	40,867	31,084
FSM	0	19,207	19,712	0	0	1,978	0	0	0	0	0	0	388	1,589
Fiji	842,884	870,309	894,389	146,905	31,618	636,312	4,223	1,543	1,331	24,521	48,895	156,583	221,405	209,378
French Polynesia	198,306	216,458	236,642	77,014	70,225	218,750	4,741	12,267	30,551	22,666	0	56,603	66,052	65,995
Kiribati	5,663	6,895	7,906	1,409	34	1,770	11	5	2	16	21	63	512	1,174
Marshall Islands	6,034	6,347	10,771	0	0	1,346	0	0	0	0	0	0	297	731
Nauru	0	0	0	0	0	20	0	0	0	0	0	0	6	14
New Caledonia	120,697	120,343	130,458	31,228	12,446	78,641	3,085	2,048	2,595	4,718	6,901	12,099	24,596	35,045
Niue	9,922	10,502	10,560	0	-	-	-	-	-	-	-	-	-	-
PNG	142,943	121,503	159,563	38,665	16,758	70,123	4,863	3,093	3,820	4,982	9,842	14,927	20,420	24,934
Samoa	155,098	167,651	173,920	20,485	0	47,059	0	0	0	0	0	0	14,579	32,480
Solomon Islands	25,709	27,866	28,930	4,440	737	7,365	129	177	10	421	275	360	2,478	4,252
Timor Leste	118,586	113,245	111,400	0	0	0	0	0	0	0	0	0	0	0
Tonga	62,136	54,046	67,517	8,932	0	18,417	0	0	0	0	146	452	4,688	13,131
Tuvalu	2,477	3,242	3,611	0	0	59	0	0	0	0	0	0	12	0
Vanuatu	109,108	115,634	120,628	21,965	0	29,143	0	0	0	0	0	0	11,817	17,326*
Wallis & Futuna	0	4,207	4,637	2,902	0	0	0	0	0	0	0	0	0	0
Total	1,980,912	2,046,436	2,171,487	379,766	158,148	1,224,329	17,316	26,839	56,570	57,423	106,585	272,088	408,117	437,133

Source: NTOs, NSOs and SPTO

* Denotes SPTO estimation

2019 Pre-Covid Tourist Arrival Numbers by Pacific Destinations

2022 Post-Covid Tourist Arrival Numbers by Pacific Destinations

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

SOURCE MARKETS	ANNUAL					
	2017	2018	2019	2020	2021	2022
Australia	626,988	619,145	638,085	103,061	23,982	436,715
New Zealand	445,652	473,662	487,788	59,026	27,431	305,485
United States of America	197,824	215,983	248,730	57,692	40,055	174,286
United Kingdom	33,683	33,175	35,058	6,875	722	12,041
Europe	182,035	205,315	228,327	62,707	43,398	148,528
China	82,332	83,646	85,284	13,687	3,726	11,702
Japan	50,333	55,575	56,967	9,598	423	4,224
India	9,880	10,174	13,181	3,145	1,119	5,792
South Korea	12,162	12,745	11,725	1,011	151	1,688
Other Asia	132,533	123,918	138,562	18,268	8,519	33,872
Pacific Islands	156,460	154,892	166,213	32,206	5,392	54,650
Other Countries	51,030	58,207	61,567	12,492	3,230	35,346
Total	1,980,912	2,046,436	2,171,487	379,766	158,148	1,224,329

2021				2022			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1,822	1,031	1,467	19,662	39,121	101,964	138,049	157,570
565	7,807	18,379	680	13,020	65,270	121,934	105,260
2,250	8,621	13,787	15,397	23,515	45,208	47,067	58,496
127	144	156	295	938	2,846	3,987	4,270
4,378	5,622	18,855	14,543	16,224	32,672	52,460	47,172
1,300	826	762	838	907	2,199	3,451	5,131
74	148	60	141	247	659	1,187	2,130
379	80	186	474	784	1,434	1,742	1,829
33	31	22	65	118	322	481	767
2,695	1,529	1,636	2,659	4,173	6,988	10,476	12,142
3,186	599	452	1,155	3,987	5,747	17,128	27,762
507	401	808	1,514	3,551	6,779	10,155	14,604
17,316	26,839	56,570	57,423	106,585	272,088	408,117	437,133

Source: NTOs, NSOs and SPTO

2019 Pre-Covid Tourist Arrival Numbers by Source Markets

2022 Pre-Covid Tourist Arrival Numbers by Source Markets

Annexure 3: Pacific Groupings

MELANESIA	2021	2022	% Change 2022 vs 2021	2022 Annual % Share
Fiji	31,618	652,175	1963%	72%
New Caledonia	12,446	139,012	1017%	15%
PNG	16,758	73,571	339%	8%
Solomon Islands	737	7,365	899%	1%
Vanuatu	0	29,143	0%	3%
Total	61,559	901,266	1364%	100%

POLYNESIA	2021	2022	% Change 2022 vs 2021	2022 Annual % Share
American Samoa	0	0	0%	0%
Cook Islands	26,330	114,883	336%	25%
French Polynesia	70,225	261,360	272%	57%
Niue	-	-	0%	0%
Samoa	0	53,609	0%	12%
Tonga	0	26,113	0%	6%
Tuvalu	0	59	0%	4%
Wallis & Futuna	0	0	0%	0%
Total	96,555	456,024	372%	104%

MICRONESIA	2021	2022	% Change 2022 vs 2021	2022 Annual % Share
FSM	0	1,978	0%	39%
Kiribati	34	1,770	5106%	35%
Marshall Islands	0	1,346	0%	26%
Nauru	0	20	0%	0%
Total	34	5,114	14941%	100%

OTHER	2021	2022	% Change 2022 vs 2021	2022 Annual % Share
Timor Leste	0	0	0%	0%

PACIFIC SUB - REGION % SHARE	2021	2022
Melanesia	39%	66%
Polynesia	61%	33%
Micronesia	0%	0%
Other	0%	0%
Total	100%	100%

Source: NTOs, NSOs and SPTO
 * Denotes SPTO estimation



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