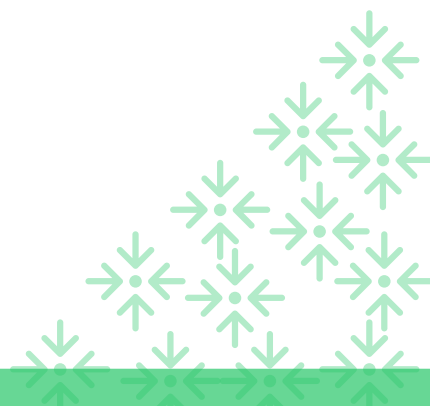




# Quarter 1 Tourism Review

2023





# International Arrivals Q1 2023 vs Q1 2019

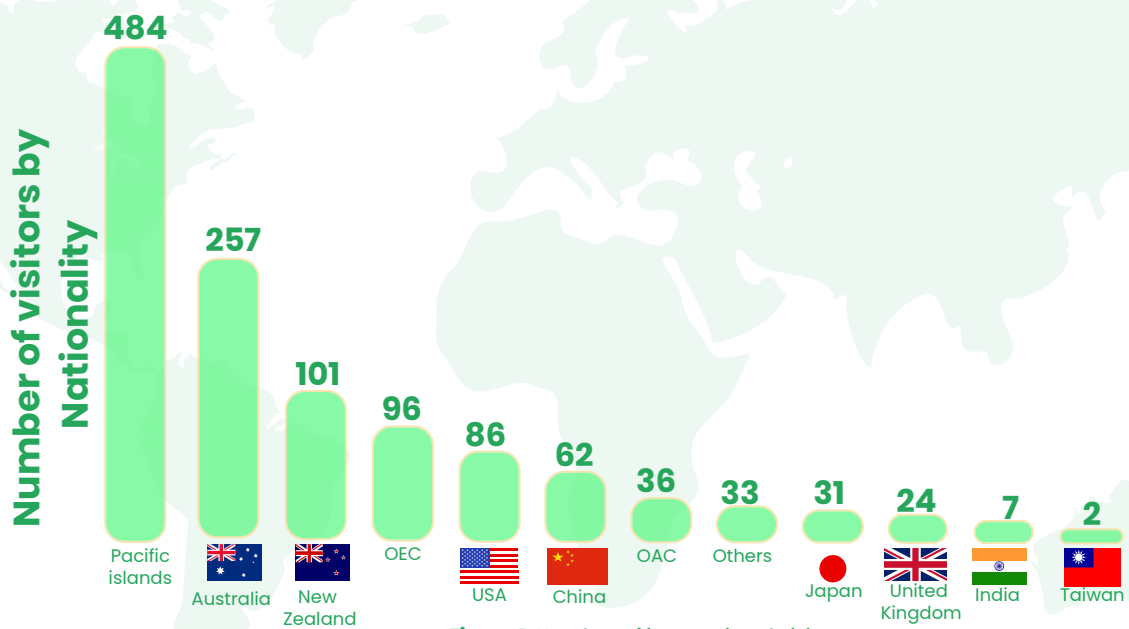


Figure 1: Number of international visitors

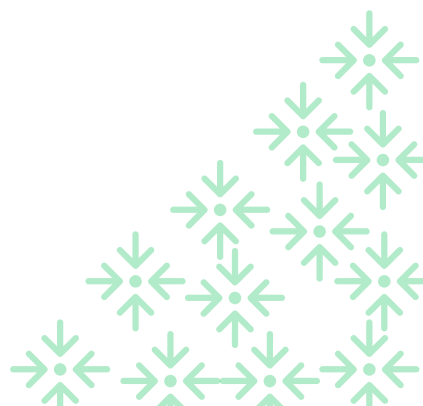
A total of 1219 international travellers visited Kiribati in Q1, 2023, 8.2% less than the same period in 2019. Australia accounted for 21% of total visitor arrival into Kiribati this quarter whilst New Zealand made up 8% of international arrivals. The United States of America made up 7% of total visitor arrivals while our emerging market, China accounted for 7% travellers in this quarter.

These arrival statistics are limited to air arrivals into Bonriki International Airport (Tarawa) only. Kiribati's second international airport, Cassidy International Airport (CXI) was closed throughout Q1, 2023.

NB: Kiritimati border opened on 3rd May 2023



- VA - Visitor Arrivals
- Q1 - Quarter 1 from January to March 2023
- CXI - Christmas Island
- TRW - Tarawa
- OEC - Other European Countries
- OAC - Other Asian Countries
- Visitor Arrival Data from MFAI - Ministry of Foreign Affairs and Immigration



# Purpose of Visit (POV)

## 17.7 nights

Average length of stay (ALOS)

The length of stay for international visitors for this quarter was 17.7 nights.

Leisure travellers ALOS was 24.5 nights. This is owing mainly to the fact that this market spends more time exploring the islands and experiencing the Kiribati culture.

The corporate market ALOS was slightly shorter at 18.1 nights whilst religious travel market averaged at 14 nights.

Like the leisure market, the VFR market registered an ALOS of 23.7 nights in Q1 and transit passengers stayed an average of 1.2 nights only.



**53%** Corporate



**27%** Leisure



**12%** Transit



**4.5%** VFR



**3.3%** Religious

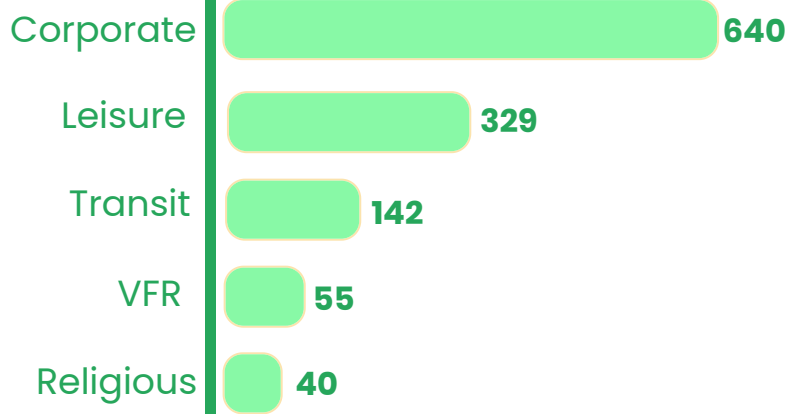


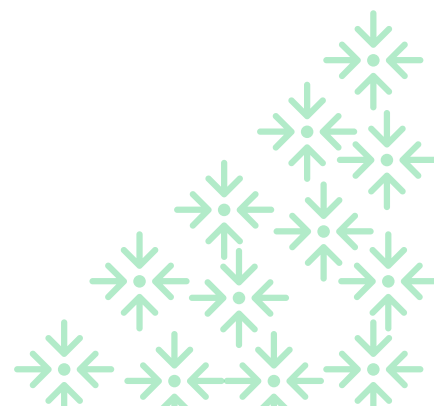
Figure 2: Number of international visitors by POV



VFR - Visiting Family and Friends  
POV- Purpose of Visit  
ALOS- Average Length of Stay  
Q1 - Quarter 1 from January to March 2023

A total of 640 (53%) visitors travelled for work purposes (meetings with Government officials to name a few). As shown on the left graph, there were more visitors came for work purposes than holiday, transit, VFR and Religious.

There were 329 (27%) individuals came for Leisure purposes to explore the outer islands and experience the local culture. There were 142 (12%) transit travellers, 55 (4.5%) VFR passengers and 40 (3.3%) Religious purpose travellers.



# International Visitors vs Permanent Residency

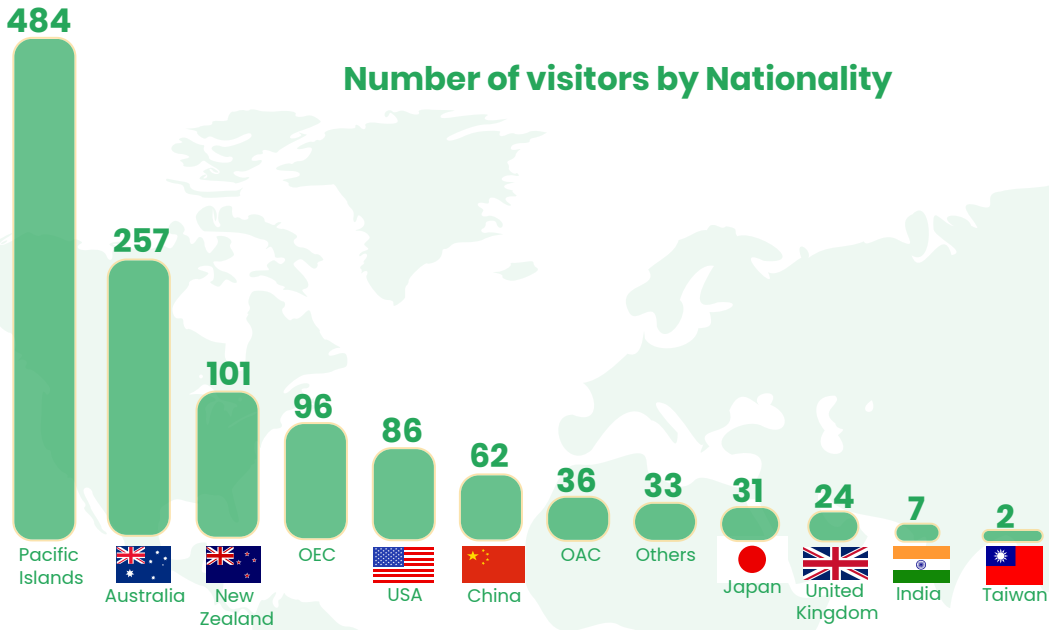


Figure 3: Number of international visitors by Nationality

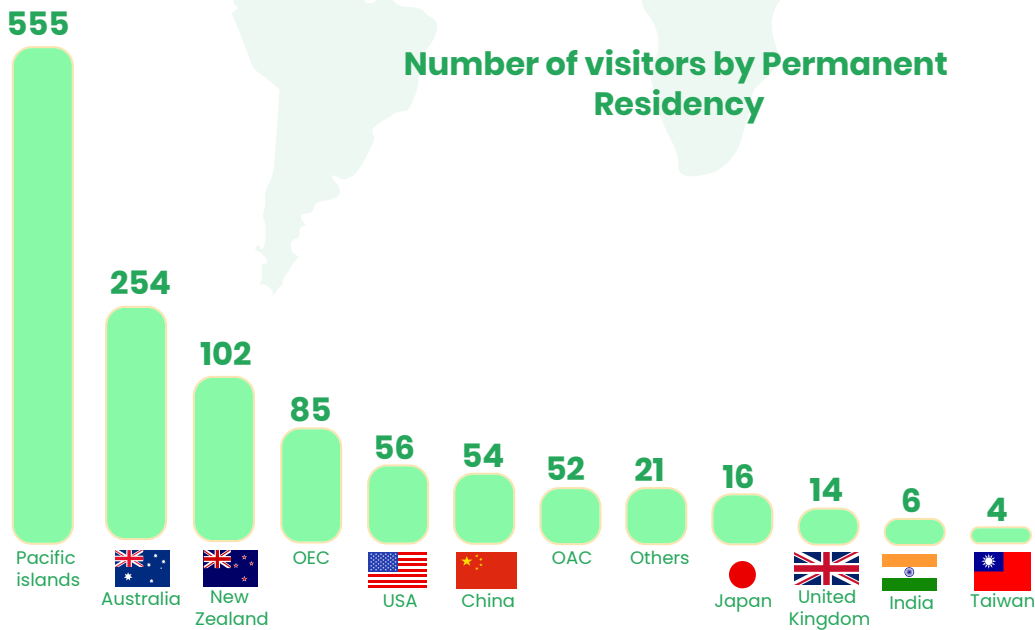
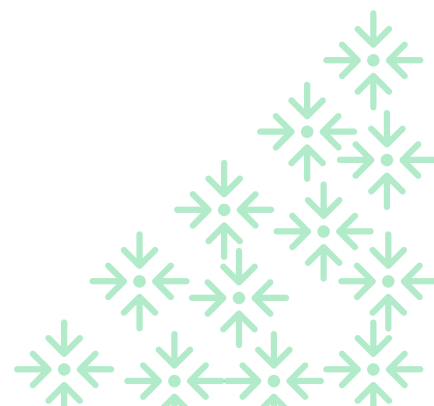


Figure 4: Number of international visitors by permanent residences

The above two graphs (figure 3 & 4) compare the number of international visitors **by nationality** with the number of international visitors **by permanent resident**. Australia is the top source market to visit Kiribati with 257 nationalities and 254 permanent residents in Q1. New Zealand, U.S.A and China are all within the top 5 international visitors by nationality and resident.



IVA - International Visitor Arrivals  
 Q1 - Quarter 1 from January to March 2023  
 OEC - Other European Countries  
 OAC - Other Asian Countries



# Pacific Visitors

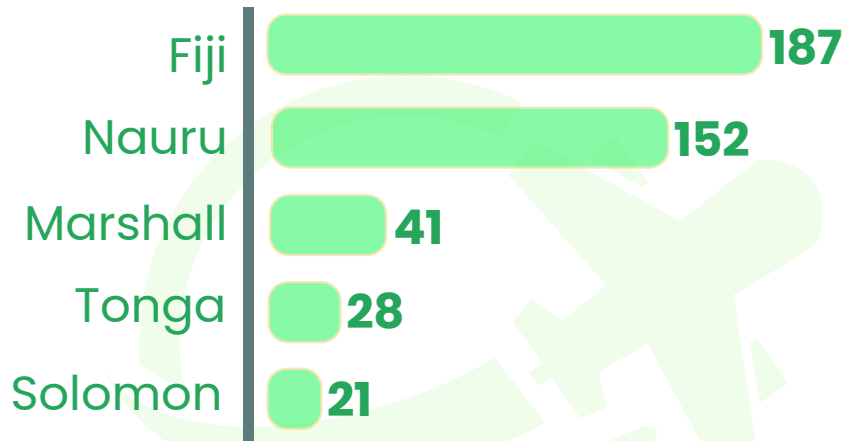


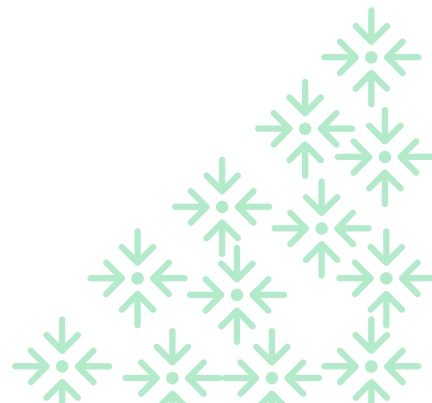
Figure 5: Top 5 Pacific islands to visit Kiribati

484 Pacific island nationals visited Kiribati in Q1, 2023. Their purpose of visits ranged from attending meetings & conference to leisure holiday. The above graph illustrated the top 5 Pacific islands nationals to Kiribati this quarter.

Fijian registered as the highest Pacific Island nationals to visit Kiribati 187, followed by Nauru, Marshall Islands, Tonga, and the Solomon Islands. Other Pacific Island nationals that visited Kiribati included Vanuatu. The high visitor arrival number by Fiji nationals is influenced by the bi-weekly Fiji Airways services from between Nadi and Tarawa.

It was noted as well that a few of these Pacific Island nationals live permanently outside the region. 11 live permanently in New Zealand, 6 in U.S.A, 5 in Australia and 1 in Japan.

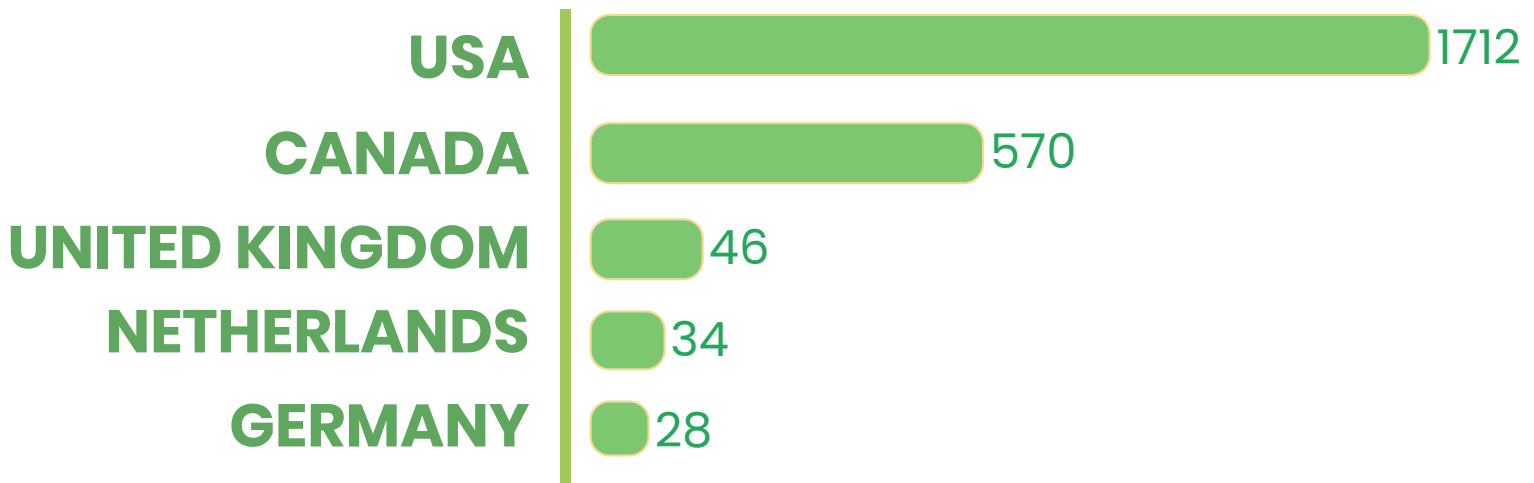
! Q1 - Quarter 1 from January to March 2023



# Cruise Market

Q1 2023 Cruise  
passengers

**2968**



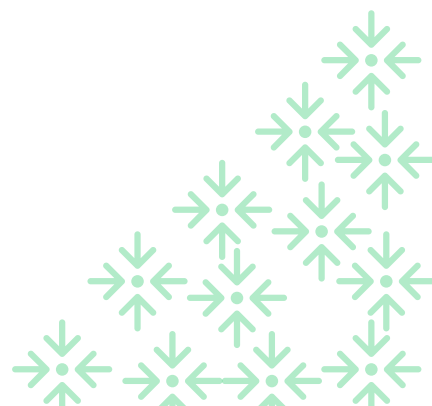
**Figure 6:** Top 5 countries to visit Fanning island (cruise pax)

A total of 2968 (2445 Fanning & 523 Tarawa) cruise passengers visited Kiribati in Q1, 2023.

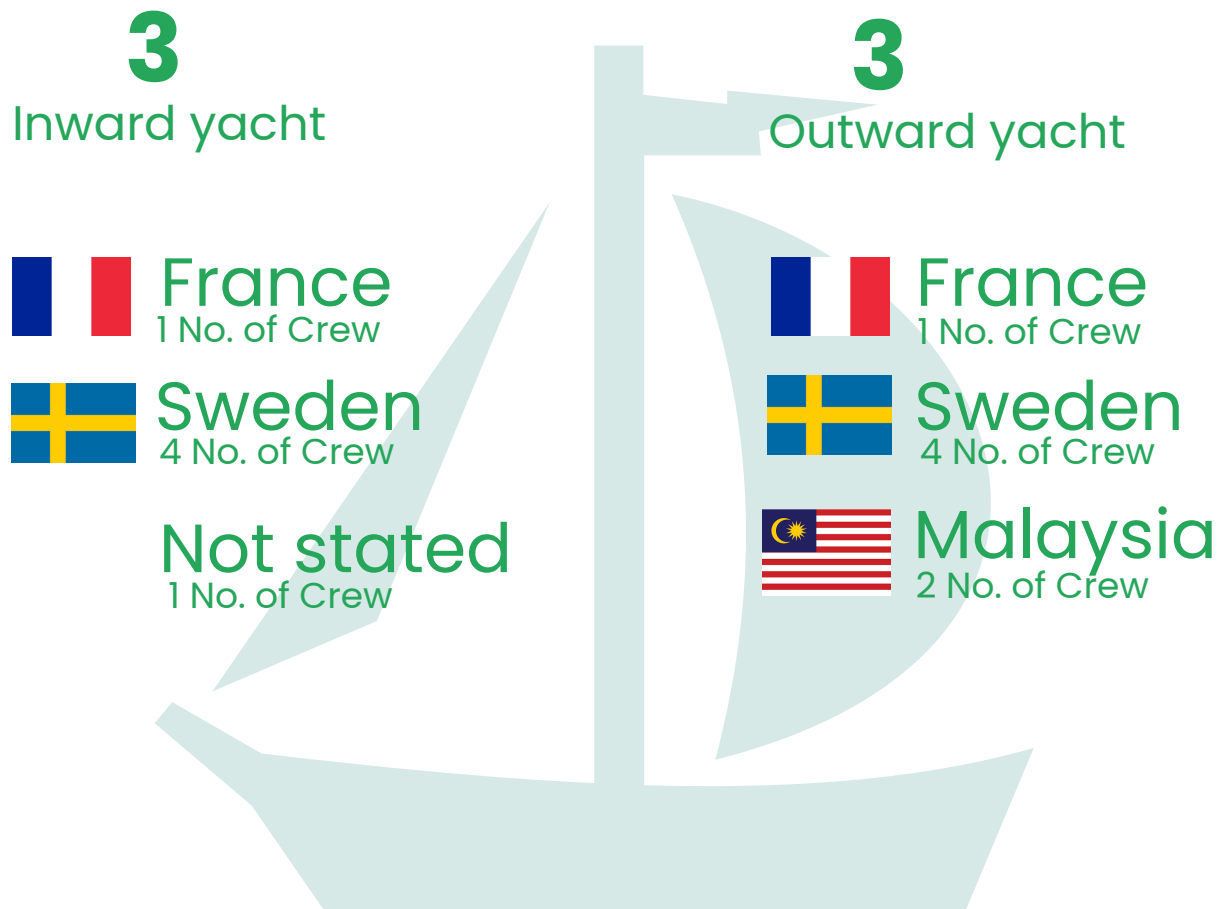
The above graph illustrates the top nationalities of passengers that visited Fanning (Tabuaeran) Island. 70% were U.S.A nationals whilst Canadians made up 23% of passengers to Fanning Island.



PAX - Passengers  
Q1 - Quarter 1 from January to March 2023



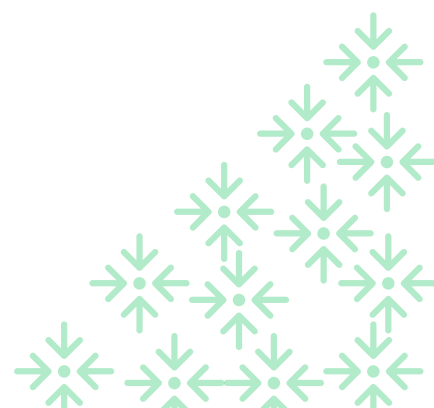
# Yacht Market



3 yachts with a combined total of 6 crew called into Kiribati in Q1, 2023. 3 inwards yacht to Kiribati meaning 3 yachts have entered Kiribati seas while 3 have departed Kiribati (outwards) this quarter.



Q1 - Quarter 1 from January to March 2023  
Yachts data from the KCAE - Kiribati  
Customs Administration and Enforcement



# Tourism & Museum



**1048**

Q1 Museum data 2023



**7% (69)**

International visitors

**93%**

Local visitors



47 Locals

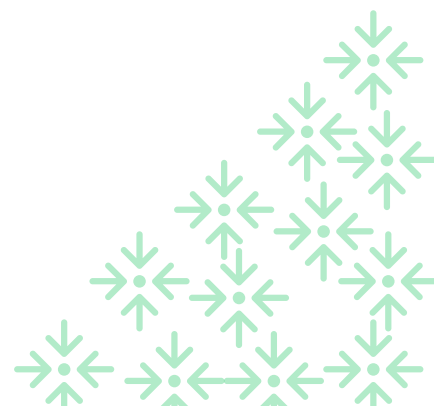


932 Student

The Kiribati Museum registered a total of 1048 visitors this quarter. 7% (69) of these were international visitors (5% cruise passengers & 2% tourists). The 5% cruise passengers were from the MS Amadea cruise ship that called into Tarawa in February while 2% came to tour the Museum. The 93% represents the number of locals (students & local visitors).



Museum data from CMD - Culture and Museum Division  
Q1 - Quarter 1 from January to March 2023





# Kiribati Domestic Market (Marine)

Maritime pax:

**13723**

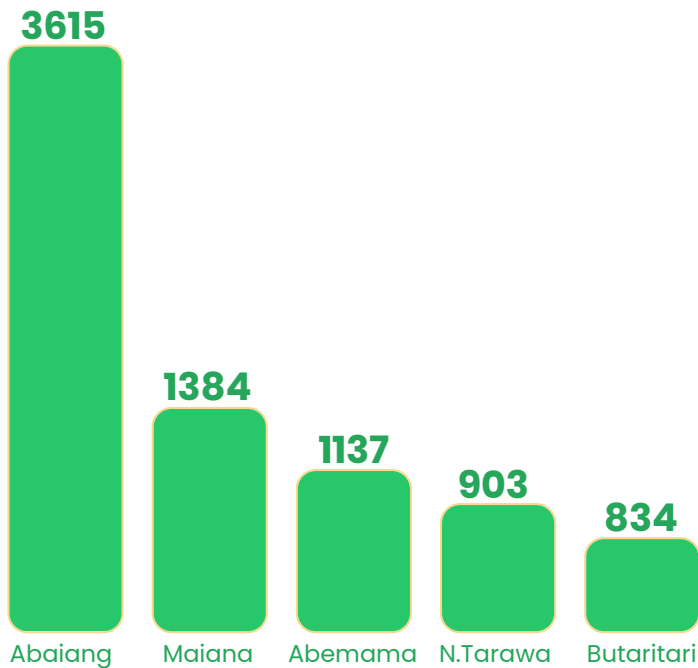


**6%**



**ABAIANG**

**3615**



A total of 13,723 passengers travelled to outer islands using the various marine transports in Q1. This represented an increase of 6% compared to Q4, 2022.

The graph on the left represents the top 5 most visited islands in Kiribati by sea. Abaiang registered the highest number of passengers as 3615 (26%). Maiana accounted for 10% for total maritime travel. These two islands are also the closest island to Tarawa.

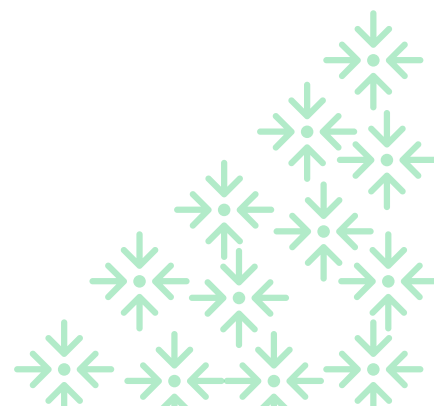
**Figure 7:** Top visited islands by boat in Kiribati

PAX - passengers

Q1 - Quarter 1 from January to March 2023

Q4- Quarter 4 from October to December 2022


Marine data from MICT - Ministry of Information, Communication and Transport

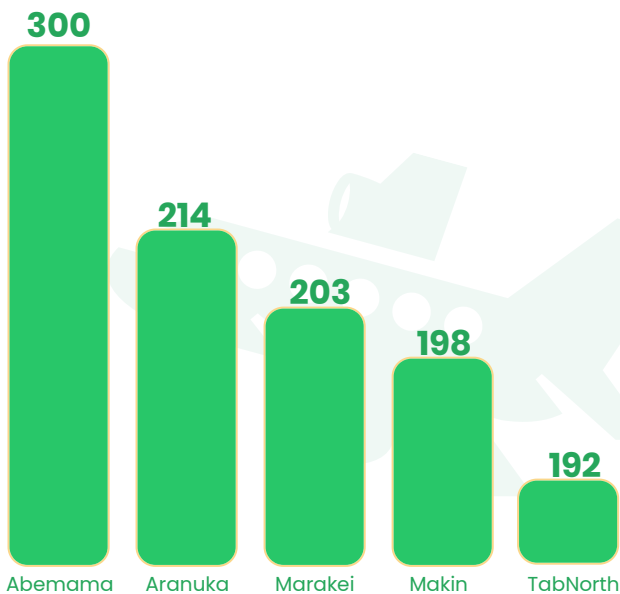


# Kiribati Domestic Market (Air)

Q1 Air pax 2023:  
**2569**

Q4 Air pax 2022:  
**5447**


 **52.8%**

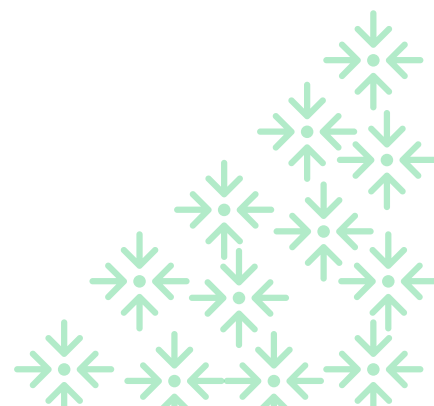


**Figure 8:** Top visited islands by air in Kiribati

2569 passengers travelled domestically in this quarter, a decrease of 52.8% compared to the previous quarter.

Abemama accounted for 11.3% of total domestic passenger traffic from Tarawa with Aranuka at 8.3% and Marakei at 7.9%.

 Previous quarter - Quarter 4 from October to November 2022  
PAX - Passengers  
Air data - from Air Kiribati Limited (AKL)



# Tourism Supply



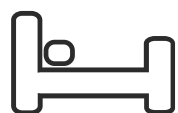
Accommodation

**1.7%** +  
Increase in number of accommodations by 1



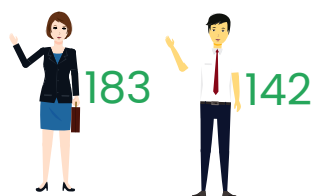
Rooms

**1.8%** +  
Increase in number of rooms by 11



Beds

**13.9%** +  
Increase in number of beds by 130

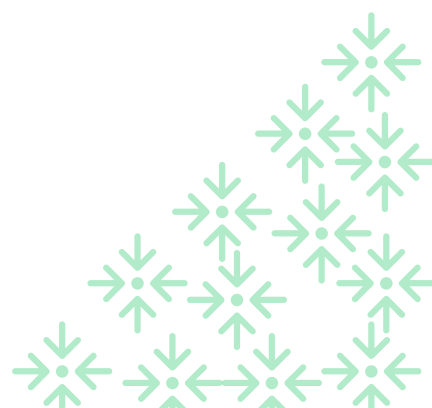


Employees

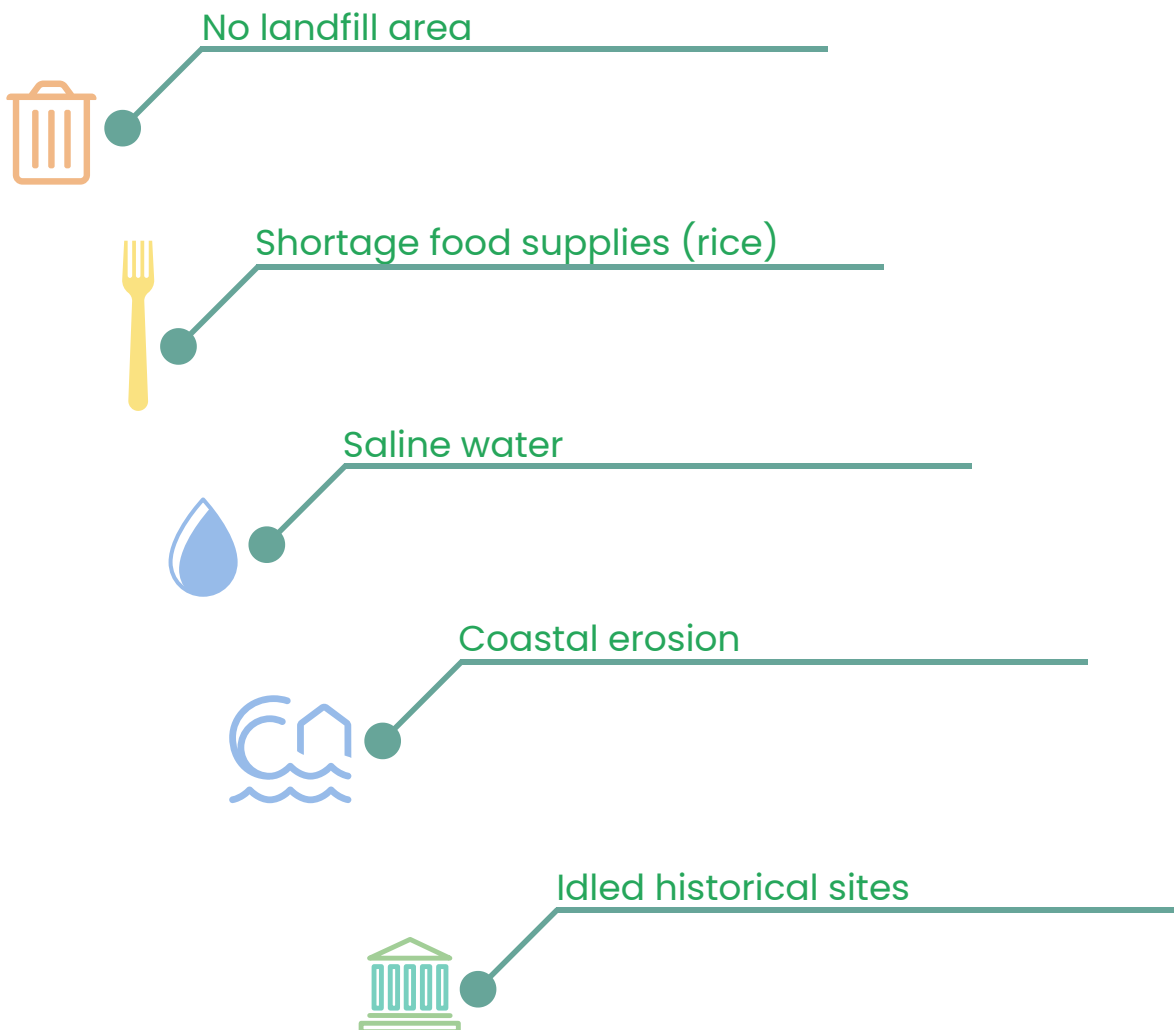
**21.7%** +  
Increase in number of employees by 58

The number of accommodations increased by 1.7% (1) for this quarter. The number of total rooms available increased by 1.8% (11 rooms), beds by 13.7% (130 beds) and employees by 21.7% (58), when compared to the previous quarter. For this quarter, we count 1 double bed as 2 bed as it can accommodate 2 persons at a time according to the industry standard.

A recent survey conducted on South Tarawa early this year recorded an increased in the number of employees by 21.7% as stated above.

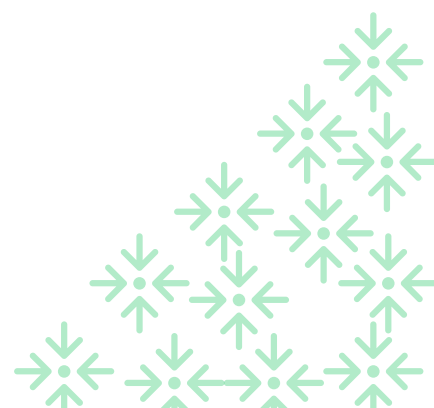


# Tourism Operator Sentiments



Tourism operators have reported several issues they encountered which negatively impacted their business this quarter. These include:

1. No landfill area in some islands like North Tarawa
2. Shortage of food supplies especially rice this is due to the delayed in food supplies shipping from overseas
3. Poor water salinity with bad smell
4. Coastal erosion
5. Historical sites like shrines were not well preserved with no proper signboard to give visitors direction. Some sites have no historical stone to mark the location.



# Tourism Intensity

Tabuaeran  
122.9%



Tarawa  
1.7%



Kiribati  
1.12%



Tourism is a national priority as reflected in the Government of Kiribati 20-year vision, KV20.

Measuring the intensity of tourism is an important component to consider lessening the negative impact of tourism. To measure the tourism intensity, we used the ratio of international visitor arrivals by air for this quarter against the population of Kiribati & Tarawa. For Tabuaeran, compared total population against total cruise passengers to measure the percentage of tourism intensity.

The higher the intensity, the higher the imbalance between number of host population and visitor number.

On a national scale, tourism intensity registered at 1.12%. This indicated a low level of tourism impact and drawbacks on the island's economy, cultural and environment. Tarawa registered 1.7%.

For Tabuaeran (Fanning Island), the tourism intensity percentage is higher at 122.9%. Whilst visitors were only there for the day, the disparity between host population count against visitor head count could potentially pose a threat on the islands social and natural environment if not managed adequately.

