



Quarter 3 Tourism Review

2023

International Arrivals Q3 2023 vs Q3 2019



2035
Visitor Arrival Q3 2019

2649
Visitor Arrival Q3 2023

30% ↑

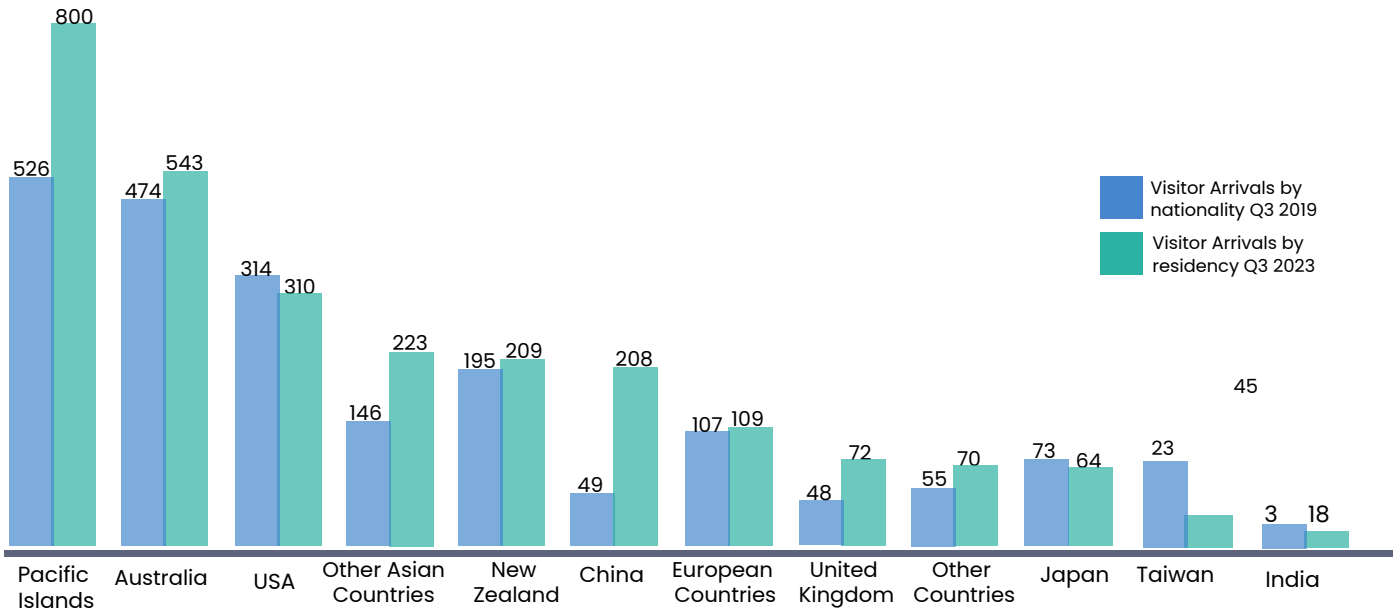


Figure 2: International visitors by National and Residency 2023

Source: MFAI

A total of 2649 international travellers visited Kiribati in Q3, 2023, 30% more than the same period in 2019. Pacific Islanders accounted for 30% (800) of total visitor arrival into Kiribati this quarter whilst Australia made up 20% (543) of international arrivals. The analysis results showed that there were more Australian nationals 46% (160) came for fishing purposes than those that came from the US 36% (124).

Additionally, the top three source market for Tarawa this quarter was Australia 18% (360) followed by New Zealand 9% (173) and USA 7% (133). For Kiritimati Island the top three source market were Australian nationals 26% (183) followed by the US 25% (177) and other Asian countries 17% (116). Immigration data indicated that most Australian arrivals were in Tarawa (TRW) whilst the USA national's dominated arrivals in Kiritimati (CXI).

The United States of America represented 12% of total visitor arrivals while China accounted for 8% travellers in this quarter. For this quarter the top source market to visit Kiribati for corporate purposes was Australia 23% followed by those that came from other Asian countries 12% while Our emerging market China visitors came for corporate 8.6% and 16.3% transit purposes.



VA – Visitor Arrivals
Q3 2023 – Quarter 3 from July to September 2023
Q3 2019 – Quarter 3 from July to September 2019
MFAI – Ministry of Foreign Affairs and Immigration

International Arrivals

By nationality and country of residency



2649

Visitor Arrivals Q3 2023

1988

Visitor Arrivals by residency Q3 2023

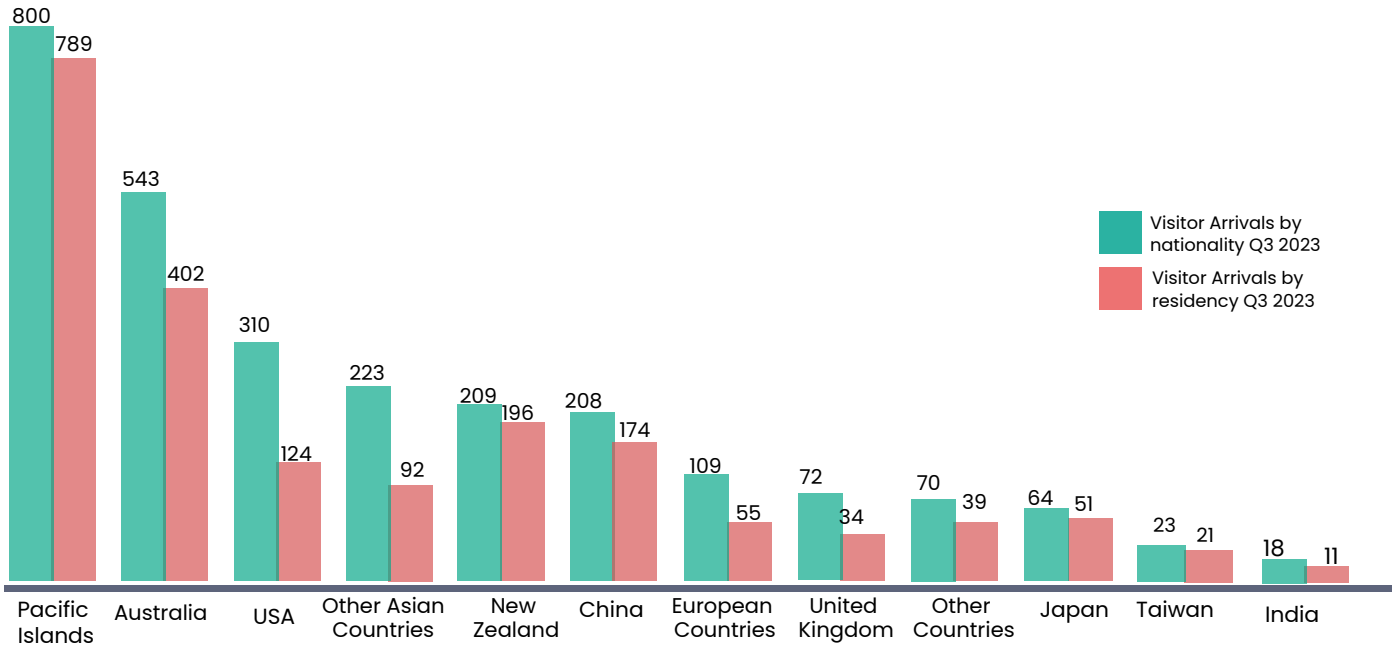


Figure 2: International visitors by National and Residency 2023

Source: MFAI

The above table compared the number of visitors by nationality and by residency. The latter said 2649 travellers visited Kiribati this quarter, representing a growth of 30% compared to the previous quarter (Q3). For the number of visitors by residency there were 1988 recorded number of visitors for this quarter. The graph further indicates that there were more Australian nationals 20% (543) than those Australian resident 20% (402).

Whilst USA nationals accounted for 12% (310) of international visitor arrivals and 6% (124) visitor arrivals by residency. With the frequent flight schedules to Kiribati there were more international travellers visiting Kiribati this quarter.



VA - Visitor Arrivals
 Q2 - This quarter (April to June 2023)
 CXI - Christmas Island
 TRW - Tarawa
 MFAI - Ministry of Foreign Affairs and Immigration

Note: Country residency for Kiribati is not available

Purpose of Visit (POV)

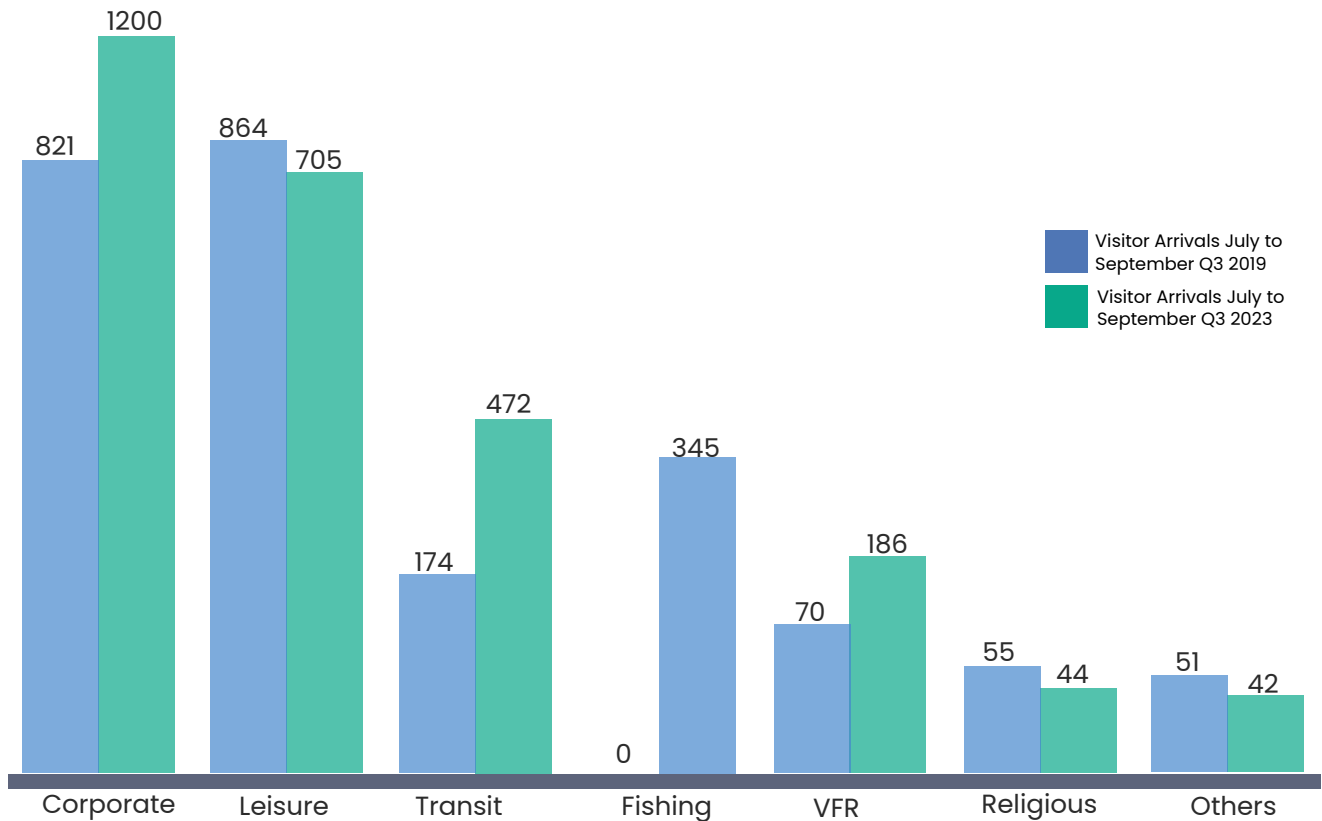



Figure 3: Number of international visitors by POV

Source: MFAI

Corporate travel registered as the highest purpose of travel at 45% (1200) in this quarter whilst the leisure travel market accounted for 27% (705) of total international visitor arrivals. 13% of the total leisure market were those that came for fishing expedition in Kiritimati island.

The Average Length of Stay (ALOS) for corporate travellers to Tarawa was 14.5 nights and 14.6 nights for corporate travellers to Kiritimati Island. Anglers spent a total of 7.6 night in Kiritimati. It should be noted that there was only one angler visiting Tarawa in this quarter from the United Kingdom (UK).

It must also be noted that in 2019 the fishing market was captured under Leisure which is represented by the 0 figure on the above graph.


 VFR – Visiting Family and Friends
 POV – Purpose of Visit
 ALOS – Average Length of Stay
 MFAI – Ministry of Foreign Affairs and Immigration

Departure Data



Number of visitors departing Kiribati

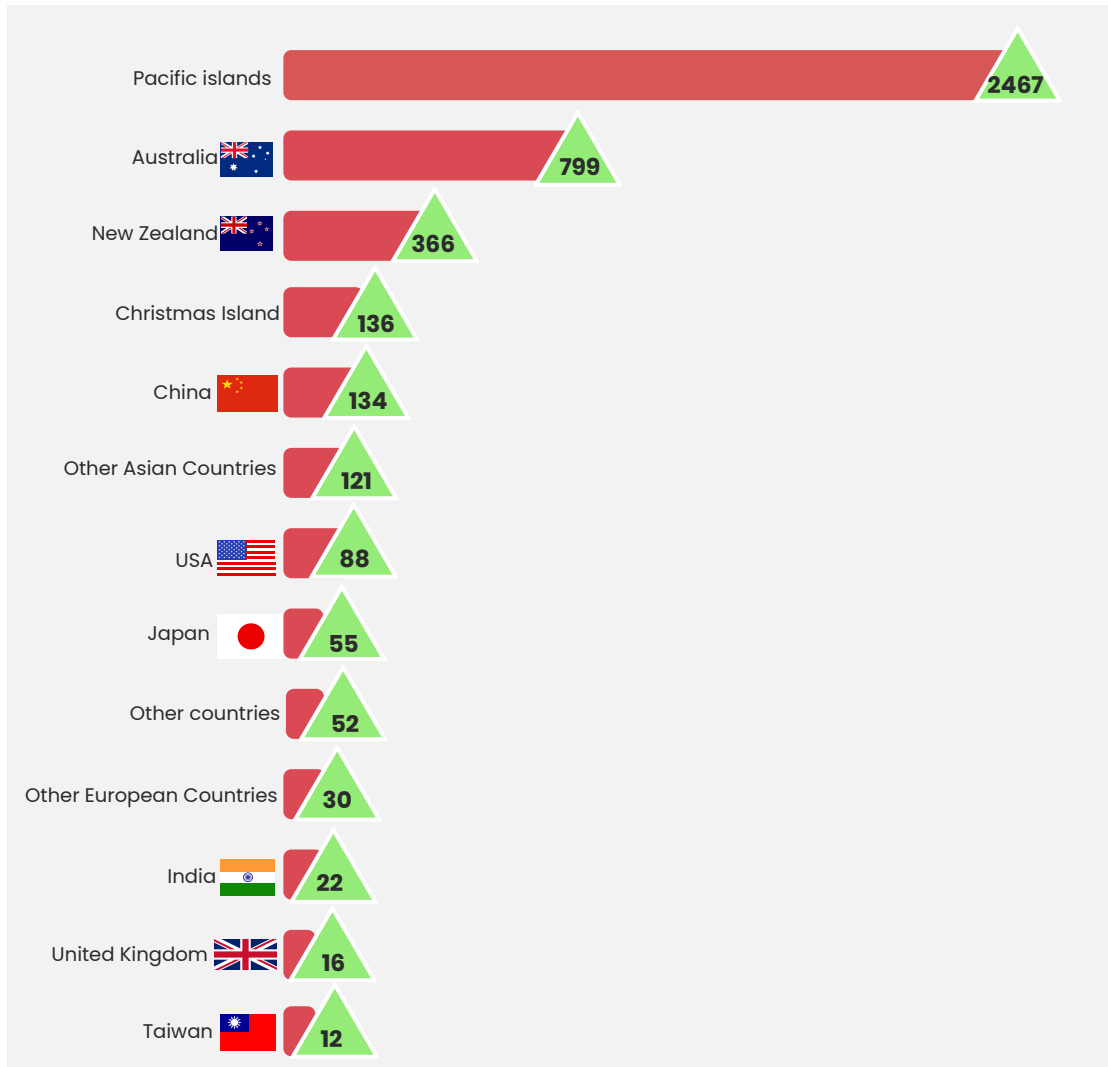


Figure 4: Number of international visitors departing Kiribati to other destination
Source: MFAI

The above graph shows the next destination for all international departures from Tarawa. A total of 4298 departures by international visitors in Q3, 19% (799) registered Australia as their next port and New Zealand at 9% (366).

Kiritimati remained a popular choice on the list of destinations for the departing visitors at 3% (136).

The above graph also indicates that 57% (2467) of international visitor departures in Q3 travelled on to visit other Pacific Island countries.



Q3 - Quarter 3 from July to September 2023

Pacific Visitors

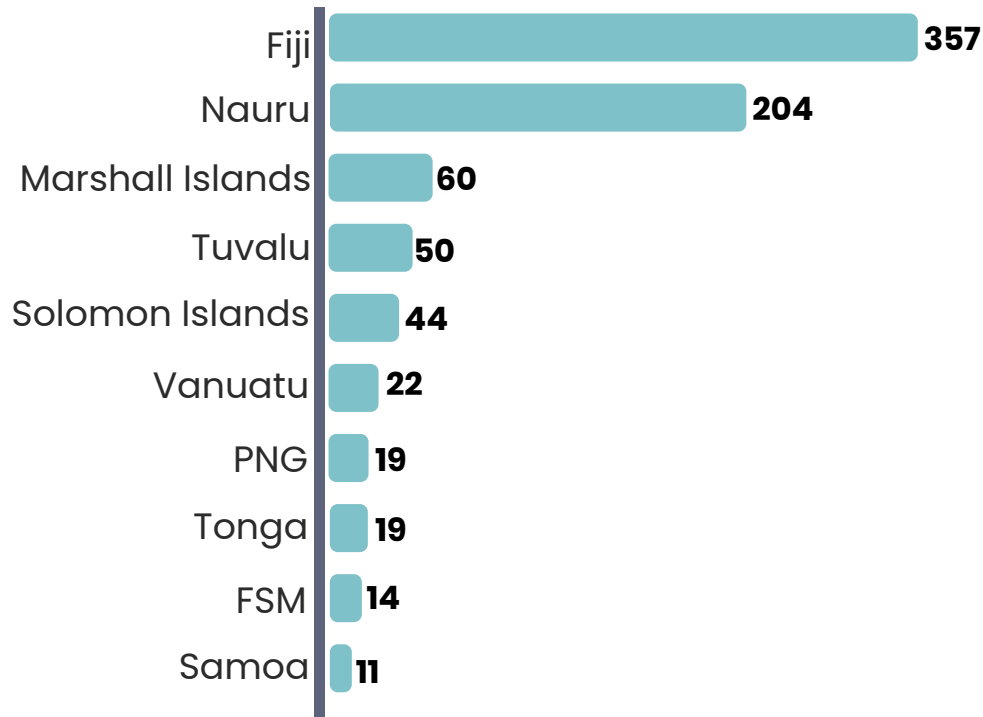


Figure 5: Number of Pacific Visitors

Source: MFAI

A total of 800 Pacific Island nationals visited Kiribati in Q3, 2023. Fiji registered as the top Pacific Island country at 45% (357) and Nauru at 26% (204) followed by the Marshall island with 8% (60). Majority of the Pacific Islanders visiting Kiribati for work purposes.

Fiji registered the highest number of nationals to visit Kiribati of the 357 arrivals 48% (174) visited for work purposes, 42% (152) came for transit purposes. Nauru registered the second highest visitor arrival in Q3. Of the 204 arrivals, 42% travelled for work purposes and 10% in transit.



Q3 - Quarter 3 from July to September 2023
PNG - Papua New Guinea
FSM - Federated States of Micronesia

Average Length of Stay

POV	ALOS
Corporate	14.6
Leisure	9
Fishing	8
VFR	34
Religious	7
Transit	0
Others	18

Source: MFAI

Leisure market travellers spent an average of 10.3 nights in Tarawa and 7.6 nights in Kiritimati Island in Q3, 2023. This equated to an ALOS of 9 nights across the destination.

Leisure market travellers included anglers (14%) and other special and experiential travellers 86% seeking to explore the destinations less travelled like Kiribati.



POV - Purpose of Visit
VFR - Visiting friends and relatives
ALOS - Average Length of Stay
MFAI - Ministry of Foreign Affairs and Immigration

Yacht Market

1

Inward yacht

PAX

4 Male & 3 Female

Yacht name

Cherokee



San Francisco

1 yacht with 7 crew called into Kiribati in Q3, 2023. As stated above, the yacht named Cherokee was from the San Francisco, U.S.A.



Q3 - Quarter 3 from July to September 2023
Yachts data from the KCAE - Kiribati Customs Administration
and Enforcement

Tourism & Museum

528
Q2 Total museum
visitors

567
Q3 Total museum
visitors

7% ↑

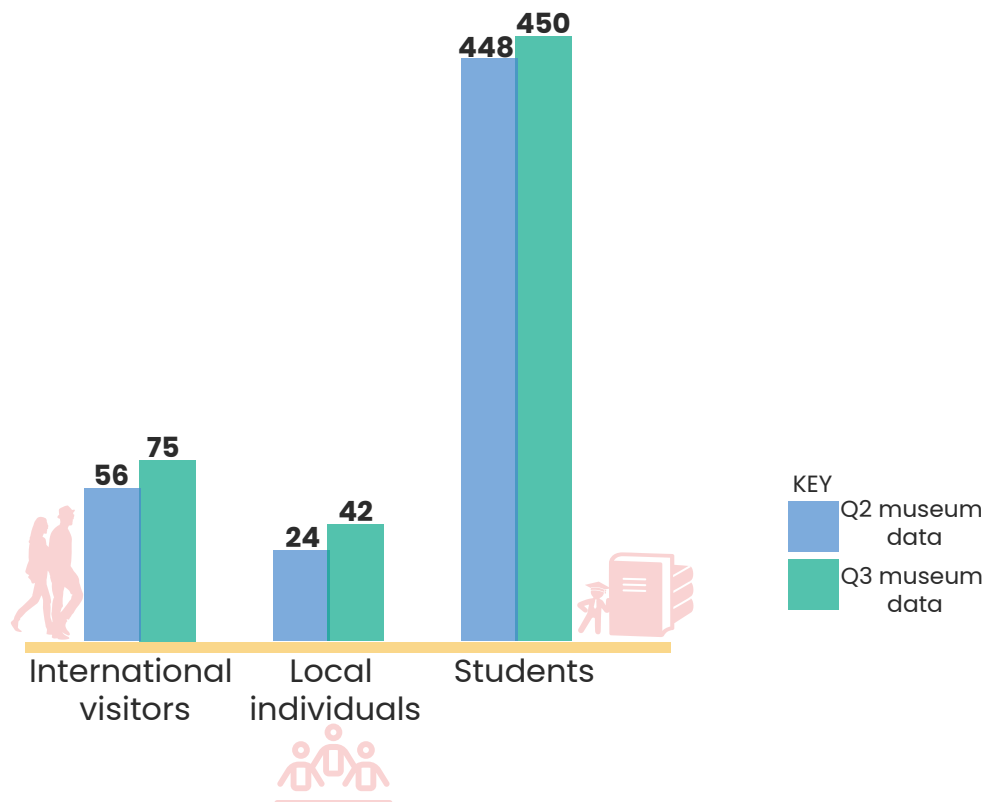


Figure 7: Number of visitors to the Museum

Source: CMD

A total of 567 guests visited *Te Umwanibong* (Museum) this quarter. This represents an increase of 7% when compared to the previous quarter. For this quarter there more student visiting the Museum than the previous quarter.



Previous quarter - Quarter 2 from April to June 2023
Q3 - Quarter 3 from July to September 2023
CMD - Culture and Museum Division

Kiribati Domestic Market (Marine)

8597

Marine data

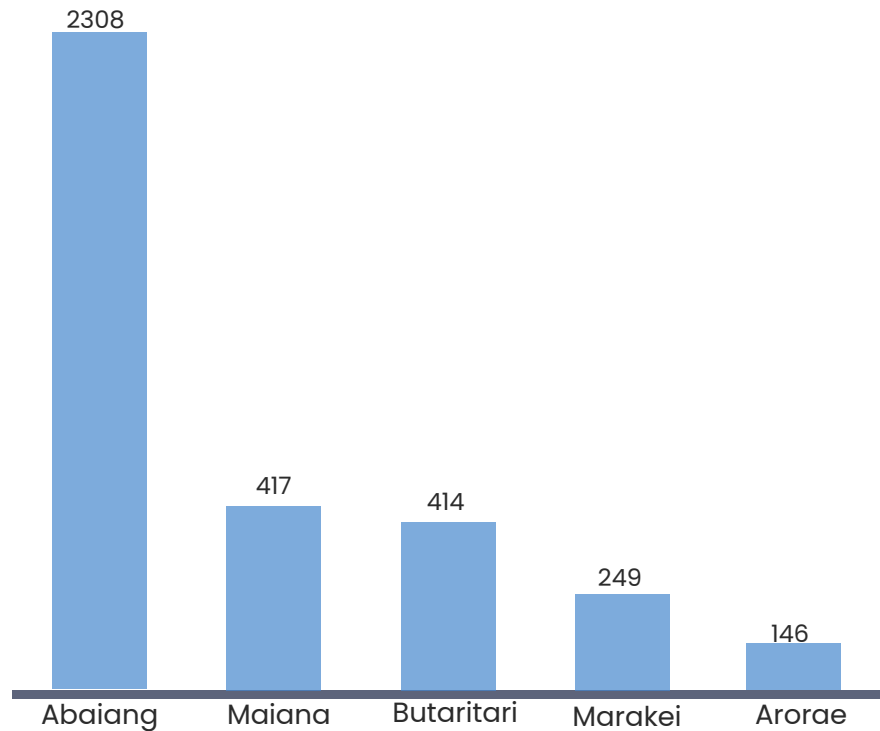


Figure 8: Top 5 islands visited by sea transport

Source: MICT

A total of 8597 passengers travelled to the outer islands by sea this quarter, 23% (2603) less than the previous quarter. The graph above represents the 5 most visited outer islands with Abaiang being the most visited via sea at 2308 passengers while the least visited islands were Nonouti, Beru and Onotoa. The remote locations of Onotoa, Nonouti, and Beru situated as the farthest from the capital of Tarawa, have contributed to a decline in the number of people visiting them.

For the Line islands the top most visited island was Tabuaeran with 67 pax while Teraina was the least visited. For this quarter there were no recorded number of passengers visiting the Phoenix islands.



MICT - Ministry of Information, Communication and Transport
Q3 - Quarter 3 from July to September 2023
Previous quarter - Quarter 2 from April to June 2023

Kiribati Domestic Market (Air)

3243

Air pax

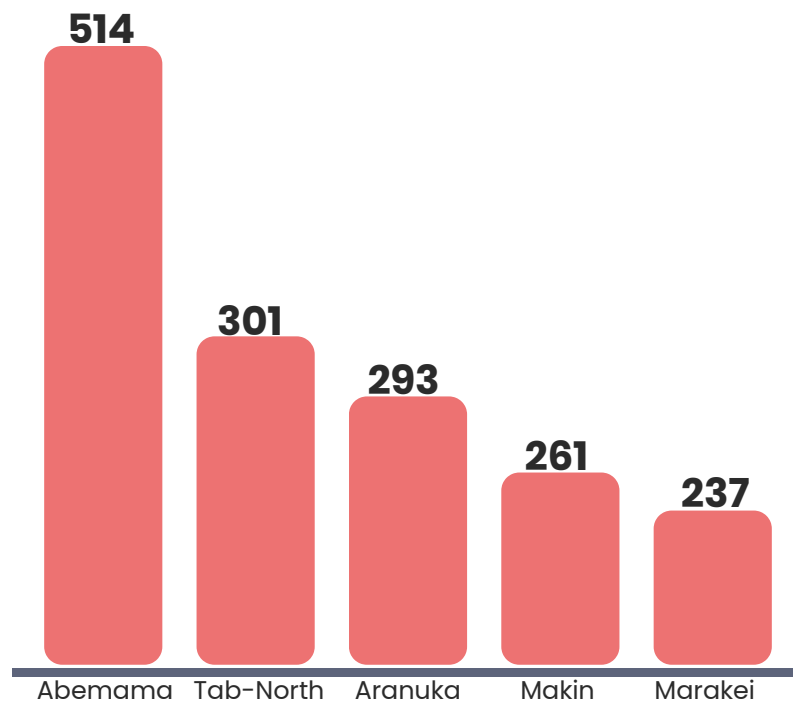


Figure 9: Top visited islands by air in Kiribati

Source: AKL

A total of 3243 passengers travelled to the outer islands by sea this quarter, 23% (2603) less than the previous quarter. The graph above represents the 5 most visited outer islands with Abaiang being the most visited via sea at 2308 passengers.

The frequent flight schedule to Abemama could be one of the reason for the frequent visit to this island. TabNorth being the second most visited island was the transit hub for aircraft that are operating between Tarawa and other farthest island at the Southern side making it the most visited island for this purpose.



PAX - passengers
Q1 - Quarter 1 from January to March 2023
Q2 - This quarter from April to June 2023
Air data - From Air Kiribati Limited (AKL)

Tourism Supply

HOTEL



Accommodation
Increased by 5

7.8%




Rooms
Increased by 31

4.7%




Beds
Increased by 80

6.6%




Employees
Increased by 17
278 Female & 247 Male

54%

The total number of accommodation operators across Kiribati increased by 7.8% (6) to 69 in Q3, 2023 compared to the previous quarter. The total number of available rooms increased by 4.7% (31) to 684. Total beds available increased by 6.6% (80) to 1301 whilst employees in the tourism sector increased by 54% (183) to 525 from the previous quarter.



Previous quarter- Quarter 2 from April to June 2023
Q3 - Quarter 3 from July to September 2023

Tourism Intensity

Kiribati



Measuring tourism intensity is crucial as it provides a quantitative assessment of the level of tourist activity in a given destination, enabling governments and stakeholders to evaluate the economic impact and sustainability of the tourism sector.

For this quarter, there is an increase in the tourism intensity in Tarawa from 2.3% to 2.9%, Kiritimati increased from 5.8% to 9.5% and Kiribati increased from 1.9% to 2.5% when comparing it with last quarter's figures.

The tourism intensity for Tarawa shows a modest level of tourist activity. In Kiritimati, with a tourism intensity of 9.5%, there is evidence of a higher level of tourist engagement. This shows that there is a need to focus on balancing the island's natural attractions and implementing sustainable tourism practices. Overall Kiribati tourism intensity is currently low and shows no threat to the natural environment.



Last quarter - Quarter 2 from April to June 2023
 Total population number - From National Statistics Office (NSO)
 Visitor Arrival Data from MFAI - Ministry of Foreign Affairs and Immigration