PACIFIC TOURISM ORGANISATION

Visitor Arrivals Snapshot

Quarter 2 Report 2024

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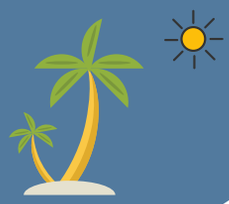
June Quarter Highlights

GLOBAL VISITOR ARRIVALS GROWTH

-4%

Decrease recorded in Jan - July 2024 compared to the same period in 2023

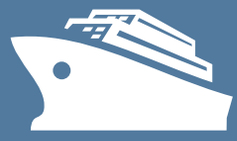
INTERNATIONAL VISITOR ARRIVALS TO THE PACIFIC (AIR)



463,304

Absolute change of -47,939 or 9% less against the total for June Quarter 2023

CRUISE VISITOR ARRIVALS TO THE PACIFIC



28,507

Absolute change of -54,873 or 66% decrease against the total for June Quarter 2023

International arrivals (overnight visitors) reached 97% of 2019 levels in the first quarter of 2024, reflecting an almost complete recovery of pre-pandemic numbers. An estimated 285 million tourists travelled internationally in the first three months of 2024, about 20% more than in the same period of 2023. These results were boosted by continued strong demand, the opening of Asian markets, as well as by enhanced air connectivity and visa facilitation.

There is still significant room for recovery across Asia. The reopening of several source markets and destinations will boost recovery in the region and globally.

Arrivals in Asia and the Pacific recovered 82% of pre-pandemic levels in Q1 2024, after recovering 65% in 2023. By subregions, North Africa saw the strongest performance with 23% more international arrivals in Q1 2024 than before the pandemic, followed by Central America (+15%), the Caribbean and Western Europe (both +7%).

Total export revenues from international tourism, including both receipts and passenger transport, reached USD 1.7 trillion in 2023, about 96% of pre-pandemic levels in real terms (i.e. excluding inflation).

Tourism direct GDP recovered pre-pandemic levels in 2023, reaching an estimated USD 3.3 trillion, equivalent to 3% of global GDP. The latest UN Tourism Confidence Index shows positive prospects for the period May-August 2024, though economic and geopolitical headwinds continue to pose significant challenges to the complete recovery of international tourism and confidence levels.

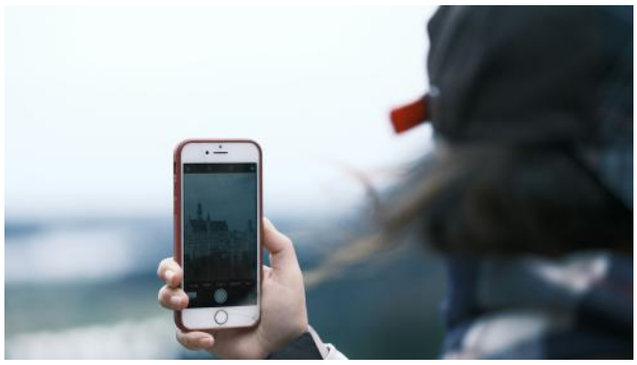
Source: UNWTO World Tourism Barometer May 2024, NTOs and NSOs

Global Travel Trends By Region

4 Game-Changing Travel Trends of 2024 in Asia Pacific Tourism

Generative Artificial Intelligence (GAI)

With applications ranging from content creation to intelligent shopping recommendations, GAI is revolutionising the travel landscape, promising seamless integration into trip planning and supply chain optimisation.



Travel Influencers

The remarkable effect created by social media influencers is demonstrated by the 6.9 billion views garnered under the hashtag #Amsterdam on TikTok. This surge has led to an 85% increase in flight and hotel searches, emphasising their significant influence on travel decisions and destination choices.

Experiential Travel

As travellers increasingly prioritise unique experiences, destinations will witness the continuing rise of experiential travels in 2024. Festivals and leisure events are forecast to be among some of the biggest trends that take centre stage, with an almost 40% increase in spending.

Music Tourism

The announcement of Taylor Swift's concert dates in Australia, Singapore, and Japan sparked a surge in flight bookings and flight searches for these destinations, highlighting the undeniable appeal of music-driven travel experiences.

Source: Pacific Asia Travel Association (PATA)

PACIFIC DESTINATIONS

Total Visitor Arrivals (Air), June Quarter 2024

463,304

-47,939
Absolute Change

June Quarter 2024
against
June Quarter 2023

-9%
Percentage Change

Breakdown of Pacific Island Destinations June Quarter 2024

PACIFIC ISLAND DESTINATIONS	JUNE QUARTER, 2023 VISITOR ARRIVALS (AIR)	JUNE QUARTER 2024 VISITOR ARRIVALS (AIR)	ABSOLUTE CHANGE	% CHANGE
American Samoa	16,822	-	-	-
Cook Islands	34,435	45,949	11,514	33.0%
FSM	-	-	-	-
Fiji	242,568	252,764	10,196	4.0%
French Polynesia	67,394	67,183	-211	-0.3%
Kiribati	2,037	2,287	250	12.0%
Marshall Islands	1,353	-	-	-
Nauru		-	-	-
New Caledonia	28,152	-	-	-
Niue		-	-	-
PNG	29,282	26,346	-2,936	-10.0%
Samoa	47,460	41,364	-6,096	-13.0%
Solomon Islands	5,055	4,171	-884	-17.0%
Timor Leste	-	5753	-	-
Tonga	13,750	6,451	-7,299	-53.0%
Tuvalu	-	1,067	-	-
Vanuatu	21,537	9,969	-11,568	-54.0%
Wallis & Futuna	1,398	-	-	-

INTERNATIONAL VISITOR ARRIVALS (AIR)

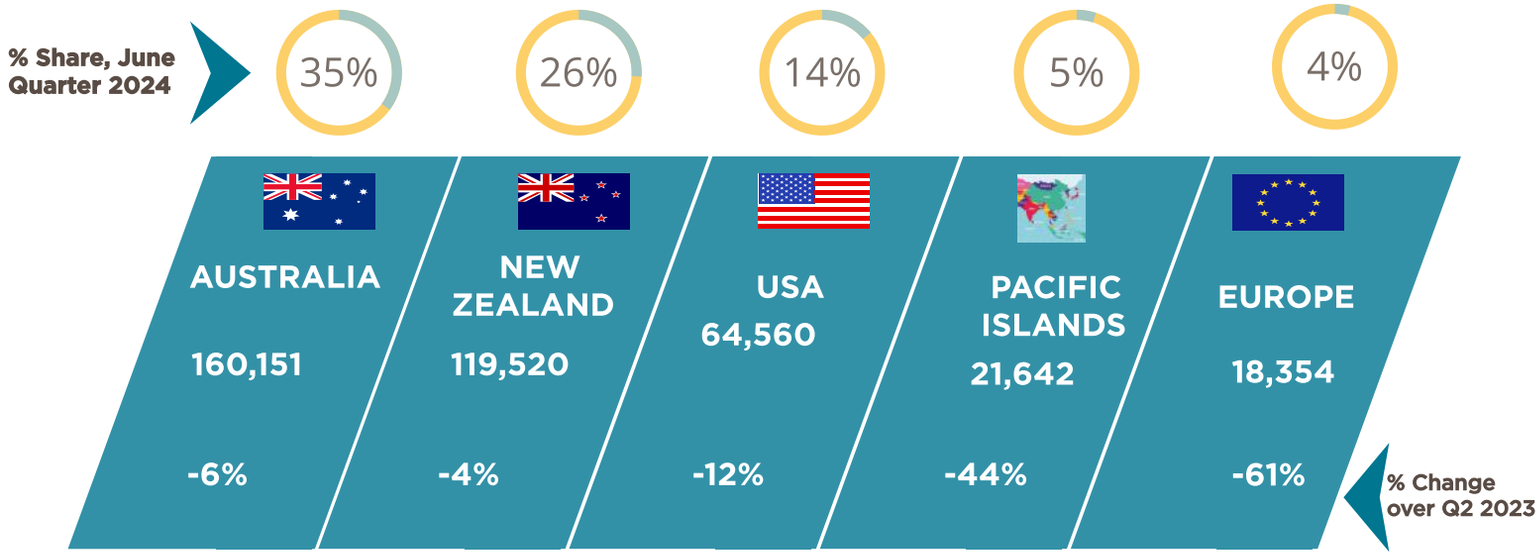
Breakdown of Quarterly Visitor Arrivals March Quarter 2022 - June Quarter 2024

QUARTER 1 MONTHS	QUARTER 2 2022	QUARTER 2 2023	QUARTER 2 2024	% CHANGE 2024 VS 2023
April	32,112	163,302	150,719	-8.0%
May	28,746	159,977	150,915	-6.0%
June	46,010	187,964	161,670	-14.0%

Source: NTOs, NSOs and SPTO

PACIFIC SOURCE MARKETS

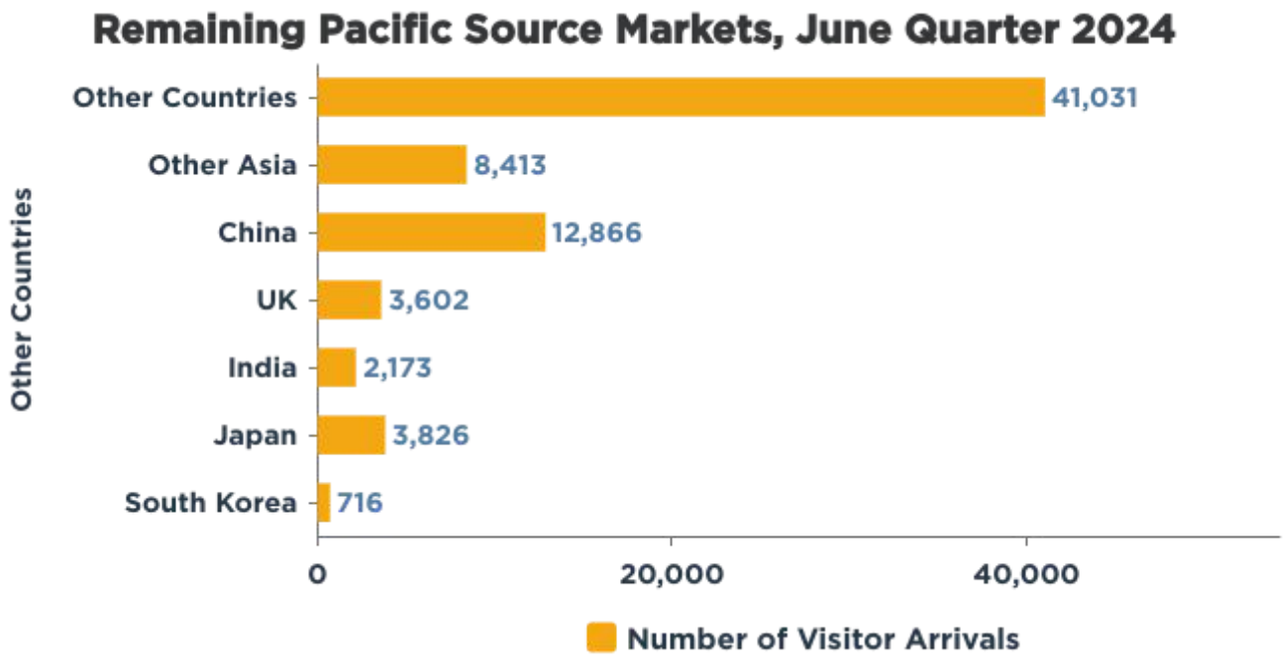
Top 5 Source Markets for Quarter 2 2024



Tourist arrivals into the Pacific and SPTO member countries in the first quarter of 2023 decreased by 11% to 456,854. Its been noted that not all the countries provided data for source market.

In the second quarter of 2024, Australian and New Zealand tourists continued to be a significant contributor to Pacific tourism, driving growth in visitor numbers, boosting local economies, and supporting recovery efforts in the region's tourism sector following pandemic-related challenges.

The USA tourism market in the Pacific is steadily growing, contributing to higher visitor arrivals and economic support for local industries. Increased connectivity and niche travel offerings are driving interest in the region.



SOURCE MARKETS	Q2 2023	Q2 2024	% CHANGE
Other Countries	17,670	41,031	132%
Other Asia	13,620	8,413	-38%
China	12,887	12,866	0.2%
United Kingdom	4,542	3,602	-21%
India	2,766	2,173	-21%
Japan	4,383	3,826	-13%
South Korea	885	716	-19%

- Despite mixed trends in tourist arrivals from secondary source markets, the Pacific's tourism sector has shown strong overall recovery post-COVID.
- Positive growth from key markets is helping offset declines from others.

Source: NTOs, NSOs and SPTO

TOTAL VISITOR ARRIVALS (AIR&CRUISE)

Total Air Visitor Arrivals June Quarter 2024
463,304

Total Cruise Visitor Arrivals June Quarter 2024
28,507

491,811
Total Visitor Arrivals June Quarter 2024

- 102,812
Absolute Change

June Quarter 2024 against June Quarter 2023
594,623

- 17%
Percentage Change

Total Visitor Arrivals, June Quarter 2023
Breakdown of Total Visitor Arrivals

PACIFIC ISLAND DESTINATIONS	JUNE QUARTER, 2023 VISITOR ARRIVALS (AIR + CRUISE)	JUNE QUARTER 2024 (CRUISE)	JUNE QUARTER, 2024 VISITOR ARRIVALS (AIR + CRUISE)	% SHARE OF JUNE QTR 2024 VISITOR ARRIVALS (AIR + CRUISE)
American Samoa	31,319	-	-	-
Cook Islands	34,435	-	45,949	9%
FSM	-	-	-	-
Fiji	266,416	3,549	256,313	52%
French Polynesia	67,394	13,499	80,682	16%
Kiribati	2,037	-	2,287	0.5%
Marshall Islands	1,353	-	-	-
Nauru	-	-	-	-
New Caledonia	69,254	-	-	-
Niue		-	-	-
PNG	29,282	-	26,346	5%
Samoa	47,460	5,707	47,071	10%
Solomon Islands	5,055	4,319	8,490	2%
Timor Leste	-	121	5,874	1.2%
Tonga	13,750	1,312	7,763	2%
Tuvalu	3933	-	1,067	0.2%
Vanuatu	21,537	-	9,969	2%
Wallis & Futuna	1,398	-	-	

Source: NTOs, NSOs and SPTO

VISITOR ARRIVALS BY PACIFIC GROUPS (AIR & CRUISE)

June Quarter 2024

Melanesia

Fiji, New Caledonia, PNG, Solomon Islands, Vanuatu

Q2 2023 - 391,544

Q2 2024 - 301,118

23%

Polynesia

American Samoa, Cook Islands, French Polynesia, Niue, Samoa, Tonga, Tuvalu, Wallis & Futuna

Q2 2023 - 199,689

Q2 2024 - 182,532

9%

Pacific Sub-Regions Total

Q2 2023 - 594,623

Q2 2024 - 491,811

17%

Micronesia

FSM, Kiribati, Marshall Islands, Nauru

Q2 2023 - 3,390

Q2 2024- 2,287

33%

Other

Timor Leste

Q2 2023 - No Data

Q2 2024 - 5,874

Source: NTOs, NSOs and SPTO

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

Destinations	Annual			2023				2024	
	2021	2022	2023	Q1	Q2	Q3	Q4	Q1	Q2
American Samoa	-	-	64,665	15,190	16,822	17,814	14,839	-	-
Cook Islands	26,330	113,346	143,506	20,954	34,435	47,345	40,772	29,486	45,949
FSM	-	1,978	-	-	-	-	-	-	-
Fiji	31,618	636,312	929,740	175,284	242,568	271,290	240,598	194,391	252,764
French Polynesia	82,546	218,750	261,813	55,188	67,394	72,818	66,413	56,082	67,183
Kiribati	34	1,770	8,224	1,219	2,037	2,649	2,319	2,438	2,287
Marshall Islands	-	1,346	6,046	1,003	1,353	1,823	1,867	2,880	-
Nauru	-	20	237	47	-	78	112	-	-
New Caledonia	12,446	78,641	111,472	26,032	28,152	33,439	23,849	-	-
Niue	-	-	-	-	-	-	-	-	-
PNG	16,758	70,123	101,600	25,671	29,282	31,151	15,496	22,132	26,346
Samoa	-	47,059	126,216	30,136	47,460	48,620	-	34,322	41,364
Solomon Islands	737	7,365	26,036	3,940	5,055	5,626	11,415	4,903	4,171
Timor Leste	-	-	-	-	-	-	-	-	5,753
Tonga	-	18,427	55,749	9,086	13,750	17,634	15,279	10,854	6,451
Tuvalu	-	59	1,362	570	-	-	792	-	1,067
Vanuatu	-	29,143	76,999	6,558	21,537	23,358	25,546	13,271	9,969
Wallis & Futuna	-	3,067	5,252	1,035	1,398	1,809	1,010	-	-
Total	170,469	1,227,406	1,918,917	371,913	511,243	575,454	460,307	370,759	463,304

Source: NTOs, NSOs, and SPTO

Annexure 2: Tourist Arrivals (Air) to SPTO Member Countries By Source Markets

Source Markets				2023				2024	
	2021	2022	2023	Q1	Q2	Q3	Q4	Q1	Q2
Australia	23,982	436,740	584,606	120,237	152,838	183,080	135,657	120,797	160,151
New Zealand	27,431	305,492	391,626	70,250	104,198	150,828	67,541	78,519	119,520
United States of America	40,055	174,296	268,181	62,906	69,513	71,057	66,200	57,607	64,560
United Kingdom	722	12,041	17,558	4,347	4,191	5,394	4,235	5,321	3,602
Europe	43,398	149,541	188,689	35,699	45,799	64,759	43,428	20,513	18,354
China	3,726	11,703	37,089	6,078	9,366	17,085	8,882	13,453	12,866
Japan	423	4,224	18,165	2,753	4,207	6,398	5,116	4,624	3,826
India	1,119	5,792	8,739	2,901	2,295	2,625	2,265	2,228	2,173
South Korea	151	1,691	3,171	753	811	1,043	839	621	716
Other Asia	8,519	33,879	31,457	12,674	7,676	16,122	6,763	6,418	8,413
Pacific Islands	5,392	56,595	143,083	37,747	32,855	41,704	36,202	30,412	21,642
Other Countries	3,230	35,412	65,158	15,568	17,134	15,281	14,095	30,246	41,031
Total	158,148	1,227,406	1,757,522	371,913	450,883	575,376	391,223	370,759	456,854

Source: NTOs, NSOs and SPTO

Annexure 3: Pacific Groupings

Melanesia	Q2 2023	Q2 2024	% Change	% Share
Fiji	242,568	252,764	4.2%	86.2%
New Caledonia	28,152	-	-	-
PNG	29,282	26,346	-10%	9%
Solomon Islands	5,055	4,171	-17.5%	1.4%
Vanuatu	21,537	9,969	-53.7%	3.4%
Total	326,594	293,250	-10%	100%

Micronesia	Q2 2023	Q2 2024	% Change	% Share
FSM	-	-	-	-
Kiribati	2,037	2,287	12.3%	100%
Marshall Islands	1,353	-	-	-
Nauru	-	-	-	-
Total	3,390	2,287	-33%	100%

Polynesia	Q2 2023	Q2 2024	% Change	% Share
American Samoa	16,822	-	-	-
Cook Islands	34,435	45,949	-33%	28%
French Polynesia	67,394	67,183	-0.3%	41%
Niue	-	-	-	-
Samoa	47,460	41,364	-13%	26%
Tonga	13,750	6,451	-53%	4%
Tuvalu	-	1,067	-	1%
Wallis & Futuna	1,398	-	-	-
Total	181,259	162,014	-11%	100%

Others	Q2 2023	Q2 2024	% Change	% Share
Timor Leste	-	5,753	-	100%

Pacific Sub - Region % Share	Q2 2023	Q2 2024
Melanesia	64%	63%
Polynesia	35%	35%
Micronesia	1%	0.5%
Other	-	1.5%
Total	100%	100%

Source: NTOs, NSOs and SPTO