PACIFIC TOURISM ORGANISATION

Visitor Arrivals Snapshot

Quarter 3 Report 2024

Table of Contents

01 Quarter 3 Highlights — Page 3

02 Global Key Results — Page 4

03 Pacific Destinations Quarter 3 — Page 5

04 International Visitor Arrivals to the Pacific — Page 6

05 Pacific Source Markets — Page 7

06 Total Visitor Arrivals (Air & Cruise) — Page 9

07 Total Visitor Arrivals (Air) by Pacific Groupings — Page 10

08 Annexures — Page 11

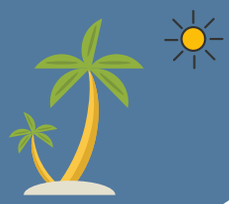
September Quarter Highlights

GLOBAL VISITOR ARRIVALS GROWTH

-2%

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

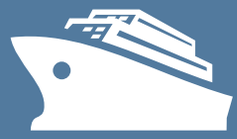
INTERNATIONAL VISITOR ARRIVALS TO THE PACIFIC (AIR)



503,509

Absolute change of -77,225 or 13% less against the total for September Quarter 2023

CRUISE VISITOR ARRIVALS TO THE PACIFIC



23,089

Absolute change of -142,827 or 86% decrease against the total for September Quarter 2023

An estimated 790 million tourists travelled internationally in the first seven months of 2024, about 11% more than in the same period of 2023 and only 4% less than in 2019. International arrivals reached 96% of 2019 levels in this period, reflecting an almost complete recovery of pre-pandemic numbers.

Results were driven by continued strong demand, in particular in Europe, the re-opening of markets in Asia and the Pacific, increased air connectivity and visa facilitation.

Data show a strong start to the year, followed by a more modest second quarter (-5%). A relatively weaker April (-10%) weighed down on Q2 results, as Easter fell in late March and adverse weather conditions affected several Western European countries.

A total of 64 out of 120 destinations around the world had recovered 2019 arrival numbers in the first six or seven months of 2024, based on countries reporting monthly or quarterly data.

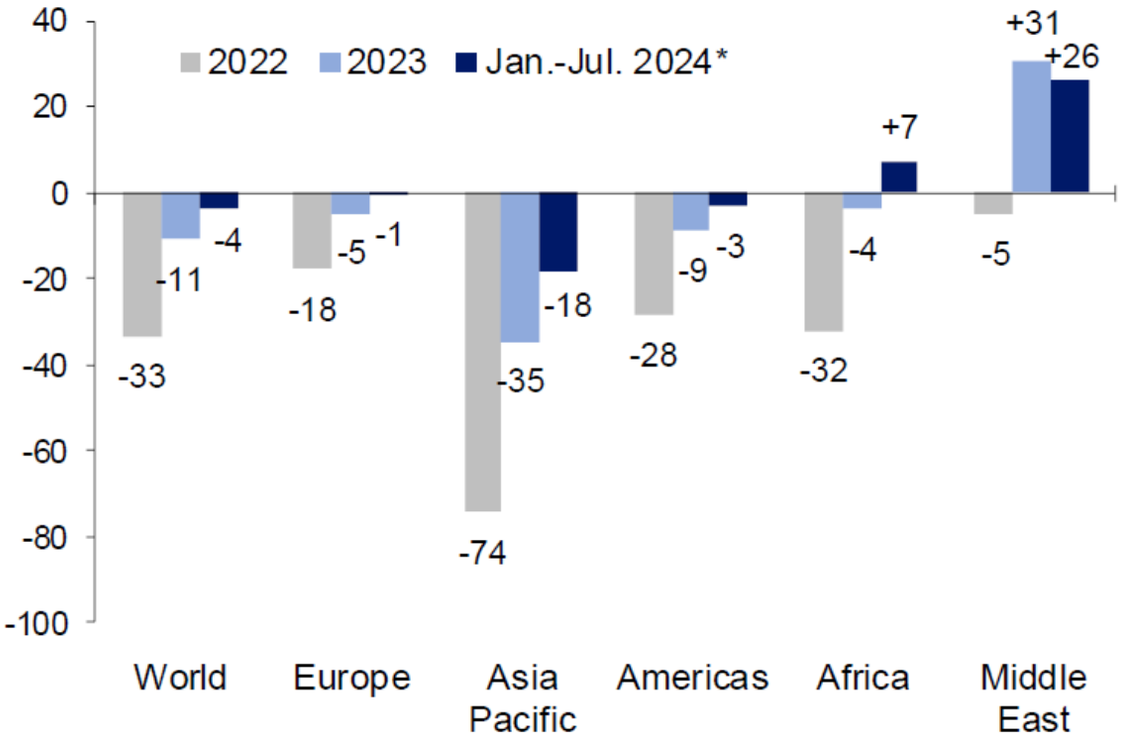
Results are in line with our projection of full recovery of pre-pandemic arrivals in 2024, despite ongoing economic and geopolitical risks.

Revised data for 2023 shows export revenues from international tourism reaching USD 1.8 trillion (including receipts and passenger transport), virtually the same as before the pandemic (-1% in real terms compared to 2019). Tourism direct GDP also recovered pre-pandemic levels in 2023, reaching an estimated USD 3.4 trillion, equivalent to 3% of global GDP.

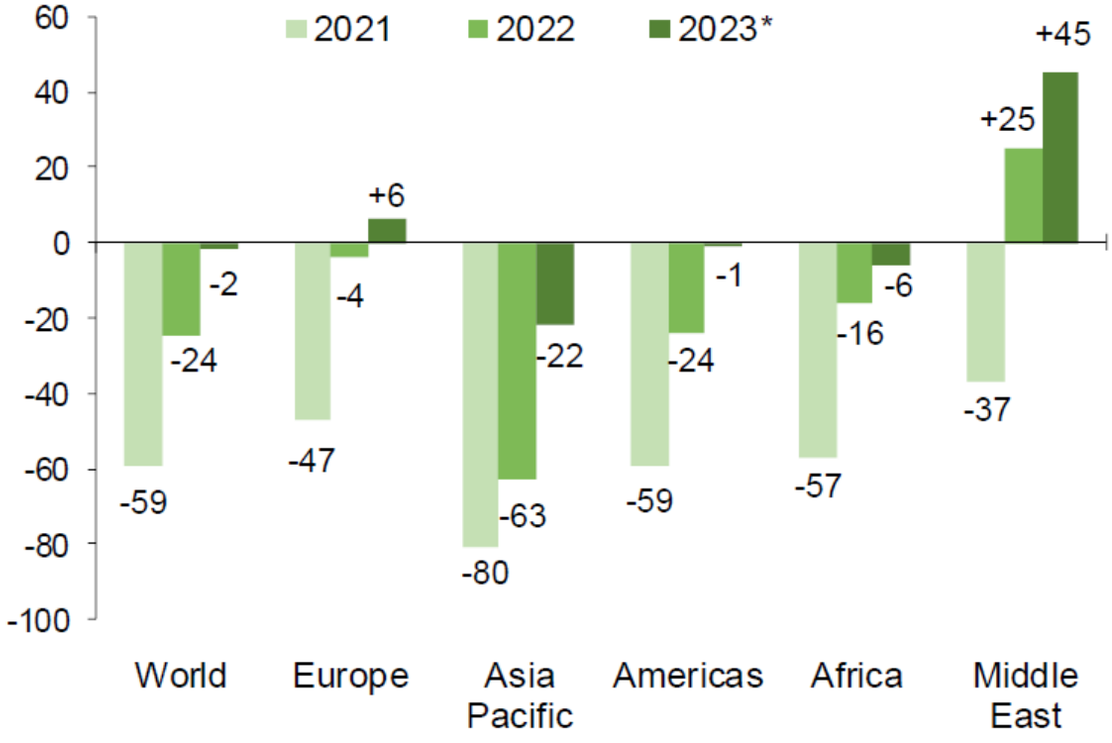
Source: UNWTO World Tourism Barometer May 2024, NTOs and NSOs

Global Key Results

International Tourist Arrivals (% change over 2019)



International Tourism Receipts (% change over 2019)[1]



Source: UNWTO Barometer (September 2024) - Provisional Data

PACIFIC DESTINATIONS

Total Visitor Arrivals (Air), September Quarter 2024

503,509

September Quarter 2024 against September Quarter 2023

-77,225
Absolute Change

-13%
Percentage Change

Breakdown of Pacific Island Destinations Quarter 3 2024

PACIFIC ISLAND DESTINATIONS	QUARTER 3, 2023 VISITOR ARRIVALS (AIR)	QUARTER 3, 2024 VISITOR ARRIVALS (AIR)	ABSOLUTE CHANGE	% CHANGE
American Samoa	17,814	-	-	-
Cook Islands	47,345	51,482	4,137	9%
FSM	444	-	-	-
Fiji	271,290	282,676	11,386	5%
French Polynesia	72,818	73,416	598	1%
Kiribati	2,649	2,141	-508	-19%
Marshall Islands	1,823	-	-	-
Nauru	78	125	47	60%
New Caledonia	33,439	-	-	-
Niue	2,414	-	-	-
PNG	31,151	-	-	-
Samoa	48,620	48,758	138	-
Solomon Islands	5,626	6,901	1,275	23%
Timor Leste	-	-	-	-
Tonga	17,634	20,062	2,428	14%
Tuvalu	-	1,422	-	-
Vanuatu	25,780	16,526	-9,254	-36%
Wallis & Futuna	1,809	-	-	-

INTERNATIONAL VISITOR ARRIVALS (AIR)

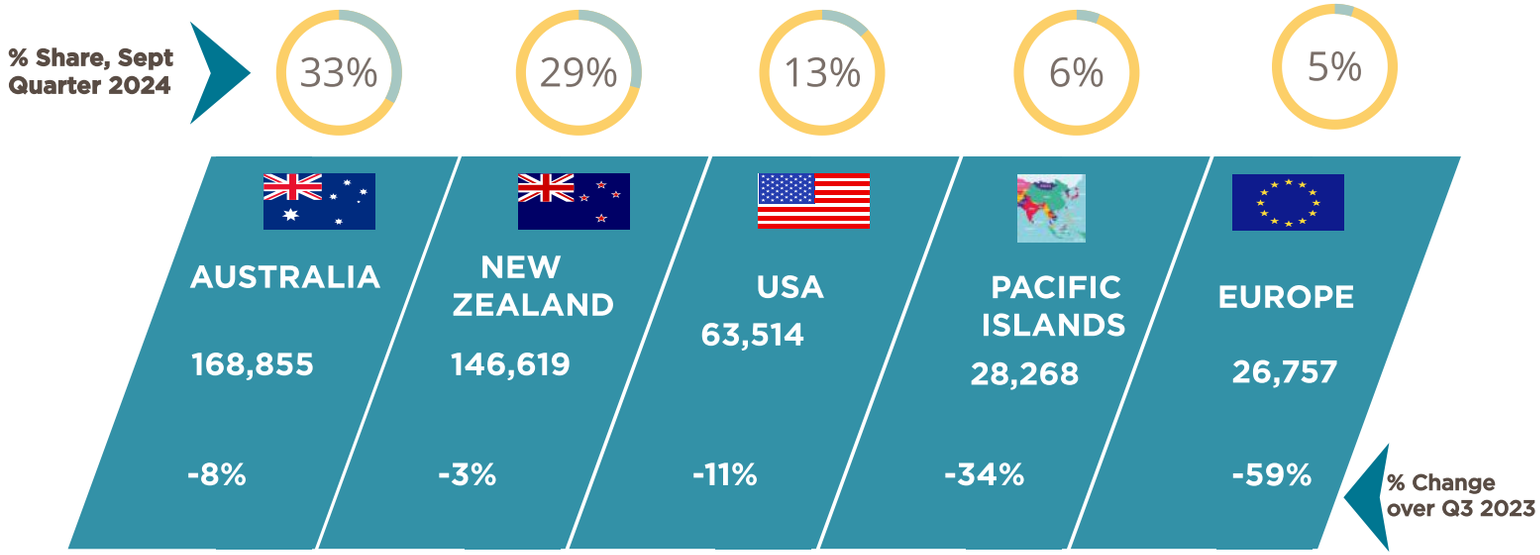
Breakdown of Quarterly Visitor Arrivals Quarter 3 (2022 - 2024)

QUARTER 3 MONTHS	QUARTER 3 2022	QUARTER 3 2023	QUARTER 3 2024	% CHANGE 2024 VS 2023
July	136,704	197,541	175,960	-10.9%
Aug	131,907	180,018	166,839	-7.3%
September	140,418	185,361	163,619	-11.7%

Source: NTOs, NSOs and SPTO

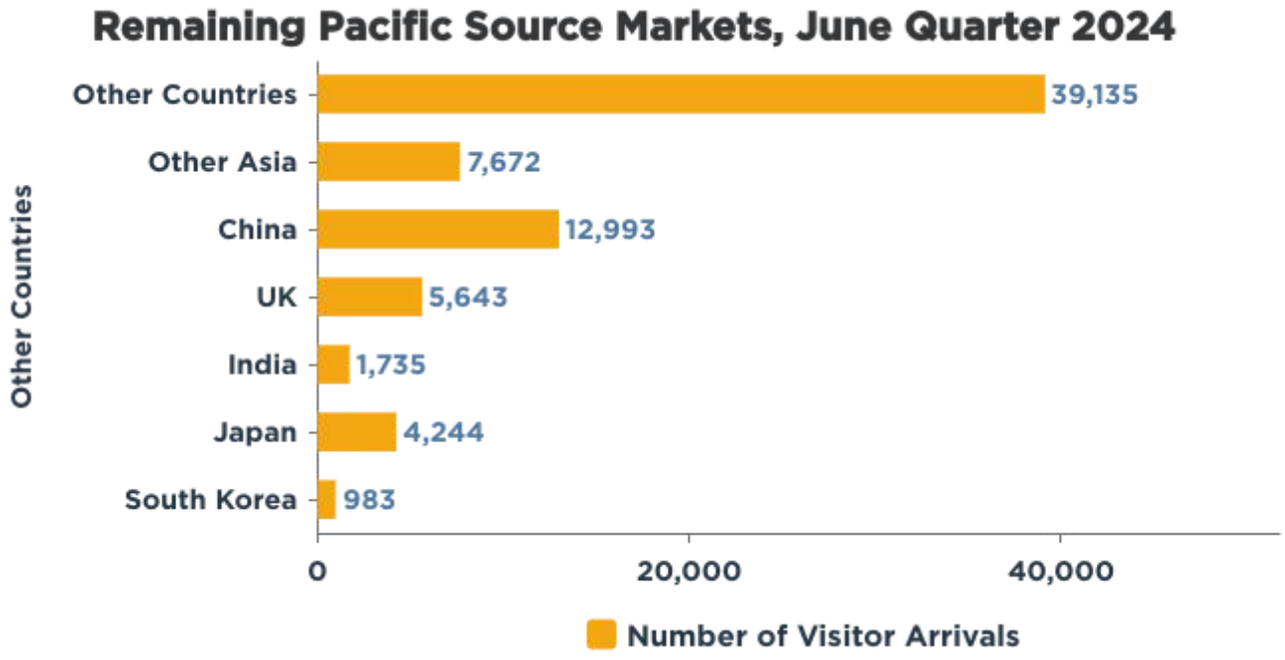
PACIFIC SOURCE MARKETS

Top 5 Source Markets for Quarter 3 2024



- The data shows that Australia and New Zealand are the dominant source markets for SPTO member countries, contributing 168,855 (33%) and 146,619 (29%) visitors, respectively, to the total of 506,418.
- The USA ranks third with 63,514 visitors, highlighting its importance as a long-haul market.
- Europe (26,757) and the Pacific Islands (28,268) are medium-sized contributors, while China (12,993) and Japan (4,244) show lower but notable visitor numbers from Asia.
- India and South Korea represent emerging markets with relatively small figures of 1,735 and 983 visitors, respectively.
- Other Asia and Other Countries contribute 7,672 and 39,135 visitors, indicating diverse international interest.
- The data emphasizes the importance of key traditional markets and the potential for growth in smaller and emerging markets.

Difference in the source markets of 10 member countries is due to some countries including cruise arrivals in the data.



SOURCE MARKETS	Q3 2023	Q3 2024	% CHANGE
Other Countries	16,471	39,135	138%
Other Asia	16,122	7,672	-52%
China	17,085	12,993	-24%
United Kingdom	5,394	5,643	5%
India	2,625	1,735	-34%
Japan	6,398	4,244	-34%
South Korea	1,043	983	-6%

- "Other Countries" shows a significant increase, indicating strong growth, while "Other Asia," China, and India reflect declines, suggesting potential challenges in these markets. Stable or slight growth in markets like the UK highlights consistent performance, while declines in Japan and South Korea may warrant targeted efforts to boost arrivals.

Source: NTOs, NSOs and SPTO

TOTAL VISITOR ARRIVALS (AIR&CRUISE)

Total Air Visitor Arrivals September Quarter 2024
503,509

Total Cruise Visitor Arrivals September Quarter 2024
23,089

526,598
Total Visitor Arrivals September Quarter 2024

- 220,052
Absolute Change

September **Quarter 2024 against** September**Quarter 2023**
746,650

- 29%
Percentage Change

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

PACIFIC ISLAND DESTINATIONS	SEPTEMBER QUARTER, 2023 VISITOR ARRIVALS (AIR + CRUISE)	SEPTEMBER QUARTER 2024 (CRUISE)	SEPTEMBER QUARTER, 2024 VISITOR ARRIVALS (AIR + CRUISE)	% SHARE OF SEPTEMBER QTR 2024 VISITOR ARRIVALS (AIR + CRUISE)
American Samoa	20,709	-	-	-
Cook Islands	47,345	-	51,482	10%
FSM	499	-	-	-
Fiji	293,516	3,034	285,710	54%
French Polynesia	84,195	11,868	85,284	16%
Kiribati	2,649	-	2,141	0.4%
Marshall Islands	1,823	-	-	-
Nauru	78	-	125	0.02%
New Caledonia	89,292	-	-	-
Niue	2,414	-	-	-
PNG	31,151	-	-	-
Samoa	48,620	2,065	50,823	10%
Solomon Islands	5,626	-	6,901	1.3%
Timor Leste	-	-	-	-
Tonga	24,868	6,122	26,184	5%
Tuvalu	-	-	1,422	0.3%
Vanuatu	92,056	-	16,526	3%
Wallis & Futuna	1,809	-	-	

Source: NTOs, NSOs and SPTO

VISITOR ARRIVALS BY PACIFIC GROUPS (AIR & CRUISE)

September Quarter 2024

Melanesia

Fiji, New Caledonia, PNG, Solomon Islands, Vanuatu

Q3 2023 - 511,641

Q3 2024 - 309,137

39.6%

Polynesia

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

Q3 2023 - 229,960

Q3 2024 - 215,195

6.4%

Pacific Sub-Regions Total

Q3 2023 - 746,650

Q3 2024 - 526,598

29.47%

Micronesia

FSM, Kiribati, Marshall Islands, Nauru

Q3 2023 - 5,049

Q3 2024- 2,266

55.1%

Other

Timor Leste

Q3 2023 - No Data

Q3 2024 - No Data

Source: NTOs, NSOs and SPTO

PACIFIC TOURISM
ORGANISATION

Level 3, FNPF Place,
343 - 359 Victoria Parade
Private Mail Bag, Suva, Fiji.
T | +679 330 4177
F | +679 330 1995
E | research@spto.org
W | www.southpacificislands.travel

PacTourismOrg
SouthPacificTourismOrg
Southpacifictourism
Pacific Tourism Organisation

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

Destinations			2023				2024		
	2022	2023	Q1	Q2	Q3	Q4	Q1	Q2	Q3
American Samoa	-	64,661	15,186	16,822	17,814	14,839	-	-	-
Cook Islands	113,346	143,506	20,954	34,435	47,345	40,772	29,486	45,949	51,482
FSM	1,978	1,795	346	329	444	676	-	-	-
Fiji	636,312	929,740	175,284	242,568	271,290	240,598	194,391	252,764	282,676
French Polynesia	218,750	261,813	55,188	67,394	72,818	66,413	56,082	67,183	73,416
Kiribati	1,770	8,224	1,219	2,037	2,649	2,319	2,438	2,287	2,141
Marshall Islands	1,346	6,046	1,003	1,353	1,823	1,867	2,880	-	-
Nauru	20	237	47	-	78	112	143	128	125
New Caledonia	78,641	111,472	26,032	28,152	33,439	23,849	-	-	-
Niue	-	2,414	-	-	2,414	-	-	-	-
PNG	70,123	112,775	25,671	29,282	31,151	26,671	22,132	26,346	-
Samoa	47,059	174,967	30,136	47,460	48,620	48,751	34,322	41,364	48,758
Solomon Islands	7,365	26,036	3,940	5,055	5,626	11,415	4,903	4,171	6,901
Timor Leste	-	0	-	-	-	-		5,753	-
Tonga	18,427	55,749	9,086	13,750	17,634	15,279	10,854	6,451	20,062
Tuvalu	59	570	570	-	-		-	1,067	1,422
Vanuatu	29,143	53,875	6,558	21,537	25,780	-	13,271	9,969	16,526
Wallis & Futuna	3,067	5,252	1,035	1,398	1,809	1,010	-	-	-
Total	1,227,406	1,959,132	372,255	511,572	580,734	494,571	370,902	463,432	503,509

Source: NTOs, NSOs, and SPTO

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

Source Markets			2023				2024		
	2022	2023	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Australia	436,740	635,636	120,237	170,074	183,080	162,245	120,797	160,151	168,855
New Zealand	305,492	462,261	70,250	125,084	150,828	116,099	78,519	119,520	146,619
United States of America	174,296	279,521	62,927	73,602	71,057	71,935	57,607	64,560	63,514
United Kingdom	12,041	18,908	4,347	4,542	5,394	4,625	5,321	3,602	5,643
Europe	149,541	193,776	35,699	46,766	64,759	46,552	20,513	18,354	26,757
China	11,703	47,551	6,078	12,887	17,085	11,501	13,453	12,866	12,993
Japan	4,224	18,864	2,753	4,383	6,398	5,330	4,624	3,826	4,244
India	5,792	11,089	2,901	2,766	2,625	2,797	2,228	2,173	1,735
South Korea	1,691	3,585	753	885	1,043	904	621	716	983
Other Asia	33,879	54,943	12,674	13,620	16,122	12,527	6,418	8,413	7,672
Pacific Islands	56,595	162,194	37,724	38,985	42,936	42,549	30,412	21,642	28,268
Other Countries	35,412	66,433	15,568	17,670	16,471	16,724	29,090	41,031	39,135
Total	1,227,406	1,954,761	371,911	511,264	577,798	493,788	369,603	456,854	506,418

Source: NTOs, NSOs and SPTO

Annexure 3: Pacific Groupings

Melanesia	Q3 2023	Q3 2024	% Change	% Share
Fiji	293,516	285,710	-2.7%	92.4%
New Caledonia	89,292	-	-	-
PNG	31,151	-	-	-
Solomon Islands	5,626	6,901	22.7%	2.2%
Vanuatu	92,056	16,526	-82.0%	5.3%
Total	511,641	309,137	-39.6%	100.0%

Polynesia	Q3 2023	Q3 2024	% Change	% Share
American Samoa	20,709	-	-	-
Cook Islands	47,345	51,482	8.7%	23.9%
French Polynesia	84,195	85,284	1.3%	39.6%
Niue	2,414	-	-	-
Samoa	48,620	50,823	4.5%	23.6%
Tonga	24,868	26,184	5.3%	12.2%
Tuvalu	-	1,422	-	0.7%
Wallis & Futuna	1,809	-	-	-
Total	229,960	215,195	-6.4%	100.0%

Micronesia	Q3 2023	Q3 2024	% Change	% Share
FSM	499	-	-	-
Kiribati	2,649	2,141	-19.2%	94.5%
Marshall Islands	1,823	-	-	-
Nauru	78	125	60.3%	5.5%
Total	5,049	2,266	-55.1%	100.0%

Others	Q3 2023	Q3 2024	% Change	% Share
Timor Leste	-	-	-	-

Pacific Sub - Region % Share	Q3 2023	Q3 2024
Melanesia	68.52%	58.70%
Polynesia	30.80%	40.87%
Micronesia	0.68%	0.43%
Other	-	-
Total	100%	100%

Source: NTOs, NSOs and SPTO