HOW SUSTAINABLE IS PACIFIC TOURISM?
Welcome to the Pacific

“OURS IS YOURS to Travel, Enjoy, Respect”
PRESENTATION OVERVIEW

• About SPTO

• Importance of Tourism to the Pacific

• Overview of Tourism in the Pacific

• Pacific Tourism Challenges

• Pacific Tourism Opportunities - PATA

• Pacific Tourism Strategy (PTS) 2015-2019

• Sustainable Tourism - The Pacific Context

• Conclusion
ABOUT SPTO

• Intergovernmental body for tourism marketing and development in the region.

• Vision: “Inspire Sustainable Growth and Empower Pacific People”

• Mandate: “Market and Develop Tourism in the South Pacific”

• Partners/Strategic Alliances
  EU, CROP, PIPS0, NT0s, PT&I network, NT0s, Cruise Lines International Association (CLIA) Sustainable Travel International (STI), National Tourism Offices

• Private Sector Members

• 17 PT governments + China
The Islands of the Pacific

SPTO MEMBER COUNTRIES
IMPORTANCE OF TOURISM TO THE PACIFIC
• Supports sustainable tourism development by placing value on Pacific cultural & natural assets.
• Only export sector in the Pacific that is increasing - compared to Agriculture etc.
• Labour intensive sector that generates employment and income to alleviate poverty.
• Source of increasing foreign exchange for the Pacific.
• Generates a multiplier effect in the national economies which positively impacts other sectors.
• Strengthens public and private sector partnerships.
• Addresses cross cutting issues by providing substantial opportunities for...
OVERVIEW OF TOURISM IN THE PACIFIC
**PACIFIC ISLANDS - A Snapshot**

*Total arrivals to the Pacific grew from 1.6 mn (2011) - 2 mn (2016)*

*Approx. 0.16% destination share of Global arrivals*

*4.3% Av annual regional growth over last six years (2011-2016).*

*54% visitor traffic from Aust (33%) and NZ (21%)*

*49% from Other Markets - Europe USA Japan, China*

*Est contribution - 3.3 US$bn*

*Est over 61,400 direct employment (SPTO HRD Plan Employment est)*
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<td>Tuvalu</td>
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<td>1,302</td>
<td>1,416</td>
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<td><strong>Total</strong></td>
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<td>1,785,120</td>
<td>1,771,273</td>
<td>1,863,702</td>
<td>1,974,139</td>
<td>2,001,817</td>
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Source: NT0s and NS0s; Note: Figures in red are SPTO Estimates
## MAJOR SOURCE MARKETS FOR PICs - 2016

<table>
<thead>
<tr>
<th>SOURCE MARKETS</th>
<th>2015</th>
<th>2016</th>
<th>Absolute Change</th>
<th>Growth(%)</th>
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<td>AUSTRALIA</td>
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<td>NZ</td>
<td>353460</td>
<td>400931</td>
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<td>USA</td>
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<td>UK</td>
<td>36494</td>
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<td>-4048</td>
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<td>EUROPE</td>
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<td>CHINA</td>
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<td>OTHER ASIA</td>
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<tr>
<td>PACIFIC ISLANDS</td>
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<td>128228</td>
<td>2319</td>
<td>1.8</td>
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<td>OTHER COUNTRIES</td>
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<td>73845</td>
<td>19200</td>
<td>35.1</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>1897551</strong></td>
<td><strong>1930345</strong></td>
<td><strong>32794</strong></td>
<td><strong>1.7</strong></td>
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</tbody>
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**Source:** NTOs, NSOs & SPTO
BY PURPOSE, LEISURE TOURISTS DOMINATES PICS IN 2016

Source: NTOs, NSOs & SPTO
FUTURE-POSITIVE FORECASTS FOR THE PACIFIC

- SPTO forecast for 2017 - 4.1% increase in visitor arrivals from 2016
- Forecasted economic contribution is 4.4 US$bn by 2019 (SPTO)
- Double tourist arrivals by 2040 to 3 million (World Bank)
- Annual growth rate of 3% per annum in tourist arrivals (World Bank)
- Additional 127,600 jobs to the region by 2040 (World Bank)
PACIFIC TOURISM CHALLENGES
CONSTRANTS TO REGIONAL GROWTH

GROUP A ("Hard to do list" of SPTO)

• The geographic spread and isolation of many Pacific countries

• A small population base and limited domestic capital for investment

• Low level of critical mass, restricting marketing funds and increasing the cost of production

• High cost of infrastructure and services

• Complex land tenure systems
CONSTRAINTS TO REGIONAL GROWTH

GROUP B (SPTO to address as priority in collaboration with other key partners)

- Limited & expensive international and domestic air services
- Limited capacity among key public sector tourism related agencies
- Lack of skilled personnel in the private sector and limited training opportunities
- Inadequate conservation of marine and land resources
- Lack of awareness and engagement at a community level
- High vulnerability to natural disasters and climate change impacts
PACIFIC TOURISM OPPORTUNITIES

BY PATA
Key changes in the global market:

• Booming economies of Asian countries – China outbound travellers is expected to be 700 mil in 2017

• Growing middle class with increased personal wealth and disposable income

• Rapid expansion in affordable air services and connectivity set to increase

• New destinations & economies

• Growing breed of New Cultural & Environmentally Responsible Travellers seeking to explore and immerse themselves in true authentic experiences

• Remote destinations with spectacular landscapes and unspoilt nature

• Time to recognise the changing dynamics of our industry
<table>
<thead>
<tr>
<th>TOURISM DEVELOPMENT CATEGORY</th>
<th>PACIFIC ISLANDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Group</td>
<td>Cook Islands, Fiji, French Polynesia, New Caledonia, Palau, Samoa, Vanuatu.</td>
</tr>
<tr>
<td>Developing Group</td>
<td>Solomon Islands, Tonga, FSM, PNG</td>
</tr>
<tr>
<td>Nascent Group</td>
<td>American Samoa, Kiribati, Tuvalu, Niue and Nauru, RMI, Timor Leste.</td>
</tr>
</tbody>
</table>
PACIFIC TOURISM STRATEGY (PTS) 2015-2019

• Approved by the Council of Ministers in October 2014
• An agreed Vision for the development of the sector
• Focus is on regional constraints and regional cooperation to facilitate sustainable tourism growth

Four sustainable pillars of the PTS

1. Increasing the economic benefits of tourism
2. Conserving the region’s highly distinctive environment and cultures
3. Ensuring visitors experience a safe environment and unique Pacific hospitality
4. Ensuring effective collaboration amongst the
KEY COMPONENTS OF THE PTS

Pacific Tourism Strategy

- Marketing the Region
- Sustainable Tourism Planning
- Cruise Ship Sector Development
- Investment and Product Development
- Research and Statistics
- HRD and Training
- Air Access and Route Development
SUSTAINABLE TOURISM DEVELOPMENT THE PACIFIC CONTEXT
• The protection of our natural environment so that it continues to be an attraction for visitors, thus ensuring the sustainability of our destinations as tourism products.

• Sustainable practices that ensure key players in the region, including hoteliers and other members of the private sector, at the forefront of protecting our assets as our islands are prone to natural disasters and hazards.

• Our culture and heritage is a niche tourism product and needs protection and conservation to ensure it does not die.

• Maintaining and sustaining both land and marine assets, among other things.
THE PACIFIC IN EMBRACING SUSTAINABLE TOURISM ETHOS AS A REGION
• Ministers of Tourism in the Pacific have recognised the importance of sustainable tourism development and that member governments are at various stages of development.

• Commended the efforts of destinations that have developed national sustainable tourism policies and plans; appreciates that others have yet to develop high-level policy documents.

• Ministers have endorsed an SPTO proposal for a 5million Euro project under EDF 11 which focuses on sustainable tourism development.

• The Pacific has prioritised the protection of its local environment - both land and sea - for many years. Its part of
• PICs have progressed, some more than others, in embracing **sustainable tourism** because we are susceptible to the impacts of climate change and natural disasters which are damaging to PI economies

• PICs have begun to mainstream sustainable tourism policies in their national planning strategies, e.g. Cook Islands launched its national sustainable tourism policies in October 2016

• The buzz word amongst donors/development partners/NGOs etc is **SUSTAINABLE TOURISM.**

• They have all embraced and assisted in the implementation of sustainable tourism development projects and programs in PICs.
CHALLENGES
• Sustainable tourism practices can be expensive, e.g. developing toolkits to measure sustainability.
• There is low level of awareness of sustainable tourism at all levels and its importance to the Pacific.
• Some of the smaller island states lack adequate technical expertise to assist in the development of sustainable tourism development policies for mainstreaming into national development plans.
• Lack of partnerships to foster sustainable growth.
• Lack of advocating for funding and technical support to
• Aligning the region’s sustainable tourism programmes with the 2030 Agenda on Sustainable Development and the Sustainable Development Goals

• Varying levels of appreciation and commitment

• Resource constraints for already struggling MSMEs such as limited access to capital, weak technological, financial and management skills etc

• Weak Governance and Policy Framework and Enforcement Processes
SPTO’s ROLE
Established the Sustainable Tourism Development Division in October 2016 with the following objectives:

- Improve and enhance SPTO’s institutional competence in effectively responding to and addressing regional and global issues on sustainable tourism development.

- Strengthen the organisation’s capacity in the development and delivery of sustainable tourism programmes that are relevant and beneficial to her members and stakeholders.

- Align SPTO’s regional sustainable tourism programmes with the 2030 Agenda on Sustainable Development and the Sustainable Development Goals.
SPTO’s role in supporting Pacific island countries in their journey to become sustainable tourist destinations through:

- Awareness and education amongst stakeholders

- Capacity building and trainings

- Establishment of a robust regional policy framework for sustainable tourism development

- Creation of new partnerships and strengthening existing partnerships to foster sustainable growth

- Advocate for funding and technical support to resource sustainability initiatives
MEASURING SUSTAINABILITY OF PACIFIC TOURISM
SUSTAINABLE RESOURCE MANAGEMENT IN HOTELS IN THE PACIFIC

UN 10 Year Framework Program on Sustainable Consumption and Production
PROJECT VISION

Develop a regional program that will provide a replicable approach for destinations and businesses across the Pacific to:

• Monitor
• Measure
• Report on and
• Address critical barriers

to improving sustainable consumption and production in the tourism industry.
Vulnerability
Lack of data
Lack of tools & motivation

Motivate enterprises
Develop a data collection tool
Train enterprises to use tool
Collate data
Impact reporting

Training of 50 businesses in Fiji & 50 in Samoa
Destination & regional data collation & reporting
Roadmap for project expansion

Accommodation providers in Fiji & Samoa

# businesses trained
# businesses collecting data
# businesses improving impacts
# impact reports produced

Improved data collection at scale
Heightened awareness of SCP
Improved decision making
Improved SCP practices
SUSTAINABLE TOURISM OPPORTUNITIES
PATA - Emerging aspirations of the new traveller

• Quieter, more discreet styles of experience are becoming highly desirable

• A growing interest in off-the-beaten-track destinations

• Seek spectacular landscapes and/or unspoilt nature

• Environmentally responsible

• Culturally rich

• Pristine
PATA- Traveller’s core values are changing

• **Uniqueness** of the product and/or destination

• A move away from the ‘Bling’ (Hawaii, Bali etc.)

• Travellers are opting for **simple more transparent products and services**

• A desire to be **entertained and stimulated** rather than just pampered

• A combination of **luxury, environmental & cultural responsibility**

• A growing desire to give back to the destination- communities

• Seek a compelling story they can tell- WOW factor in a
Papua New Guinea, Solomon Islands and Timor Leste are part of the Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security

- Established in 2009 to support the protection of the region’s values and sustainable use of its marine resources
- One of the gaps identified is the need to strongly focus on tourism development opportunities
- Identify business opportunities for government and private sectors to work towards a regional approach for a commercially viable Low-Volume, Low Impact, High-Value Nature Based Tourism
SPTO has started discussions with WWF – Suva Office on potential areas of collaboration especially to the 3 countries through:

- Technical expertise in sustainable tourism development and Branding and Marketing
- Awareness and capacity building in the Pacific tourism sector stakeholders
- Advocating for regional support, collaboration and resourcing
- Marketing an promotion of the initiative to niche markets
WAY FORWARD

Share experiences, best practices and lessons learnt

Need to accelerate & increase Partnerships

Commit to Small Steps is Better than No Commitment at all

Sustainability provides opportunities to diversify & differentiate our product offerings

Enhance/promote our Sustainable USPs

Conserve resources and generate sustainable economic benefits for SIDS

Measuring Pacific Tourism Sustainability is key for Future Planning
CONCLUSION

How Sustainable is Pacific Tourism?

• We are on the right track but much work still needs to be done.

• There is no “quick fix.”

• The Pacific to be sustainable must change not only our economic attitudes and environmentally attitudes but also our social attitudes.

• Sustainability is a journey and we must work together to achieve the future we want!
2017 is a GREAT OPPORTUNITY TO START

http://www.tourism4development2017