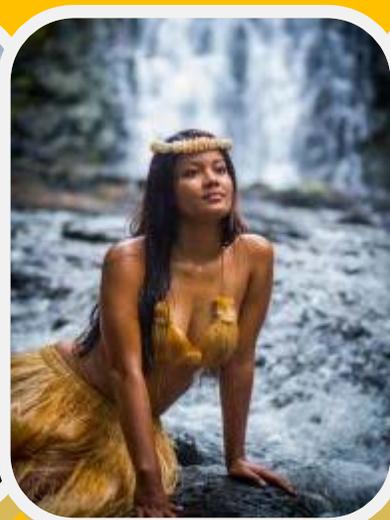


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By Chris Cocker
Chief Executive Officer

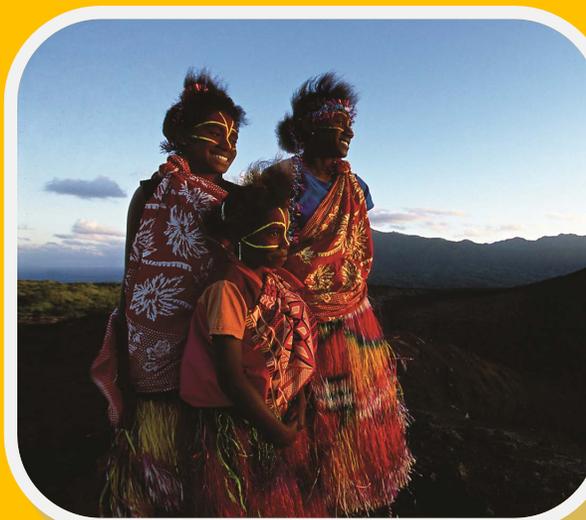


**SUSTAINABLE TOURISM
DEVELOPMENT
IN THE SOUTH PACIFIC**



Welcome to the Pacific

“OURS IS YOURS to Travel, Enjoy, Respect”



PRESENTATION OVERVIEW



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- **About SPTO**
- **Overview of Tourism in the Pacific**
- **Pacific Tourism Challenges**
- **The Pacific – Embracing Sustainable Tourism**
- **SPTO’s Sustainable Tourism Initiatives**
- **Measuring Sustainability of Pacific Tourism**
- **Pacific Sustainable Tourism Challenges**
- **Pacific Sustainable Tourism Opportunities**
- **Conclusion**



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ABOUT SPTO

- Intergovernmental body for tourism marketing and development in the Pacific.
- Vision: **“Inspire Sustainable Growth and Empower Pacific People”**
- Mandate : **“Market and Develop Tourism in the South Pacific”**
- Partners/Strategic Alliances
EU, CROP, PIPSO, National Tourism Offices (NTOs), PT&I network, Cruise Lines International Association (CLIA) Sustainable Travel International (STI), UNDP, Non-Government Organisations (IUCN, WWF and local NGOs)
- Private Sector Members
- 17 PI governments + China

The Islands of the Pacific



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United States
of America

SPTO MEMBER COUNTRIES





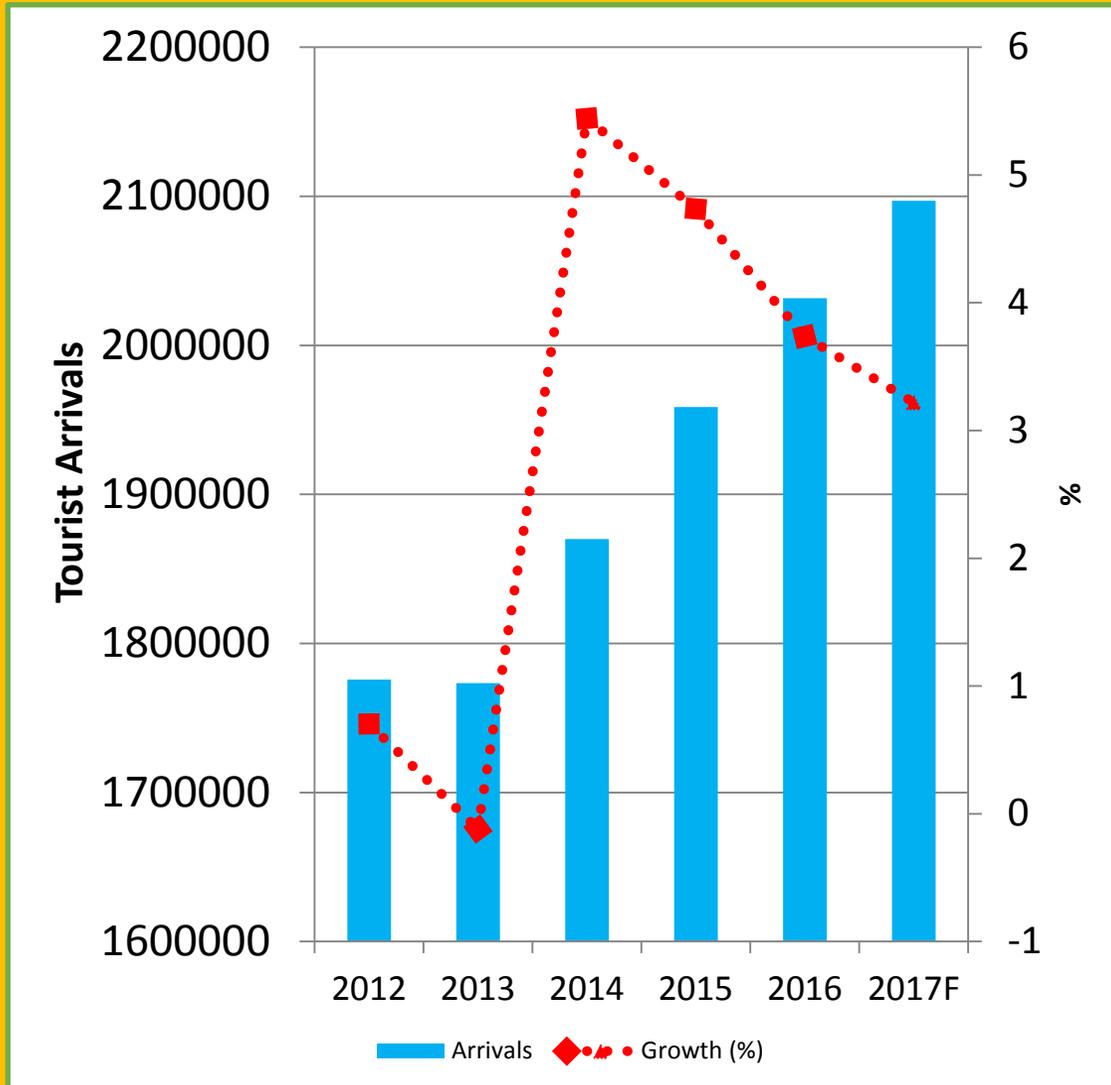
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OVERVIEW OF TOURISM IN THE PACIFIC

PACIFIC ISLANDS - A Snapshot



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- * Total arrivals to the Pacific grew from 1.6 mn (2012) - **2 mn (2016)**
- * Approx. **0.16%** destination share of Global arrivals
- * **3.0%** Av annual regional growth over last five years (2012-2016).
- * **54%** visitor traffic from Aust (33%) and NZ (21%)
- * **49%** from Other Markets – Europe USA Japan, China
- * Est contribution - **3.3 US\$bn**
- * 2017 Forecast - **2.1 million**, Forecast growth **3.2%**
- * Est over **61,400** direct employment (SPTO HRD Plan Employment est 2013)

ANNUAL VISITOR ARRIVALS BY DESTINATION: 2011-2016



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Destination	2012	2013	2014	2015	2016	Year to June 2017
Fiji	660590	657706	692630	754835	792320	372686
French Polynesia	168978	164393	180602	183831	192495	91656
PNG	167149	184321	191442	198685	178509	76364
Samoa	134687	124673	131719	136104	145176	65772
Cook Islands	122384	121158	121458	125132	146473	70996
Palau	118754	105066	140784	161931	138416	59778
New Caledonia	112204	107753	107187	114072	115676	51301
Vanuatu	108161	110109	108811	89952	95117	46492
Tonga	47457	48188	50436	53731	59130	18846
FSM	38263	42109	35440	30240	24125	5863
Timor Leste	34902	44146	48986	61037	71680	49391
Solomon Islands	23925	24431	20070	21623	23192	11306
American Samoa	22580	20846	21603	20335	20050	10467
Niue	5047	7047	7408	7707	7818	1960
Kiribati	4907	5868	5111	4353	5018	2469
Marshall Islands	4590	4342	4876	6311	9831	1221
Tuvalu	1019	1302	1416	2344	2465	1066
Nauru					3038	3002
Total	1,775,597	1,773,458	1,869,979	1,947,826	2,030,529	957,602

40%

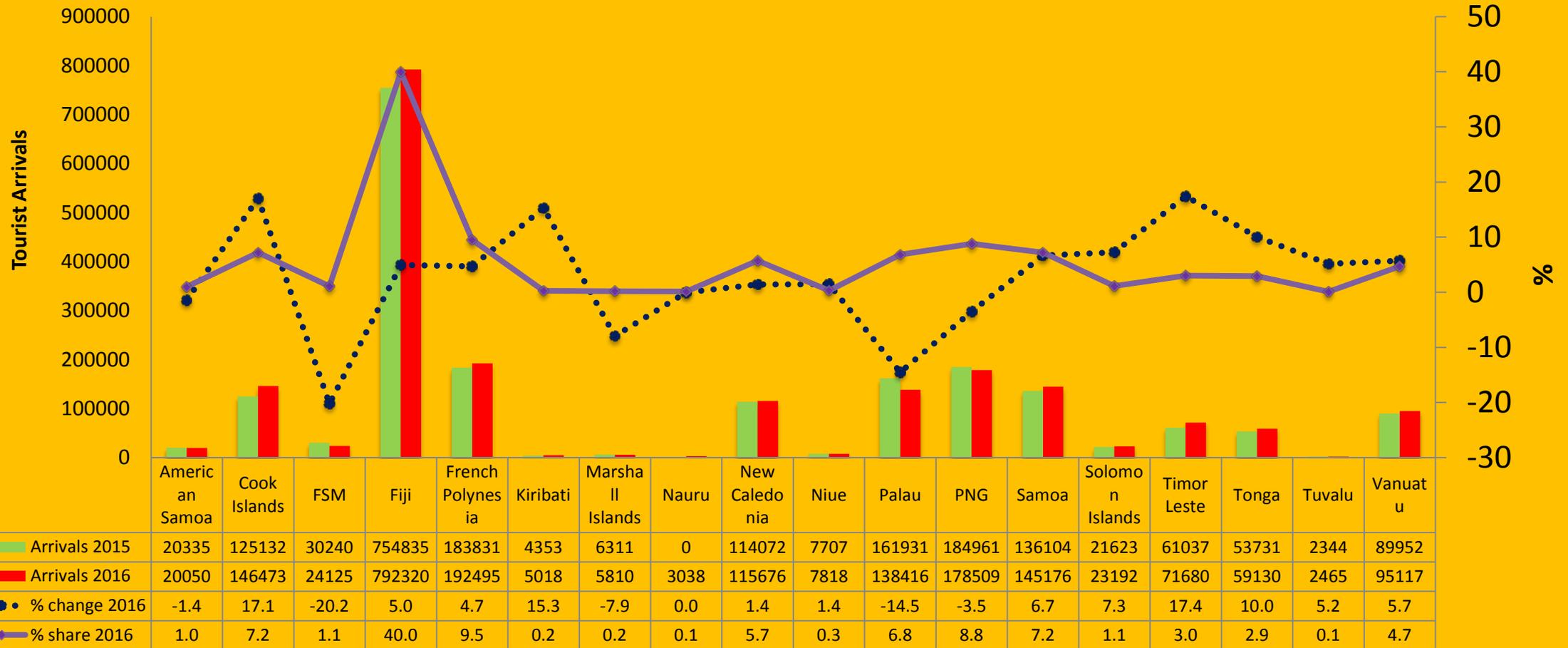
45%

15%

VISITOR ARRIVALS BY SHARE & GROWTH 2016



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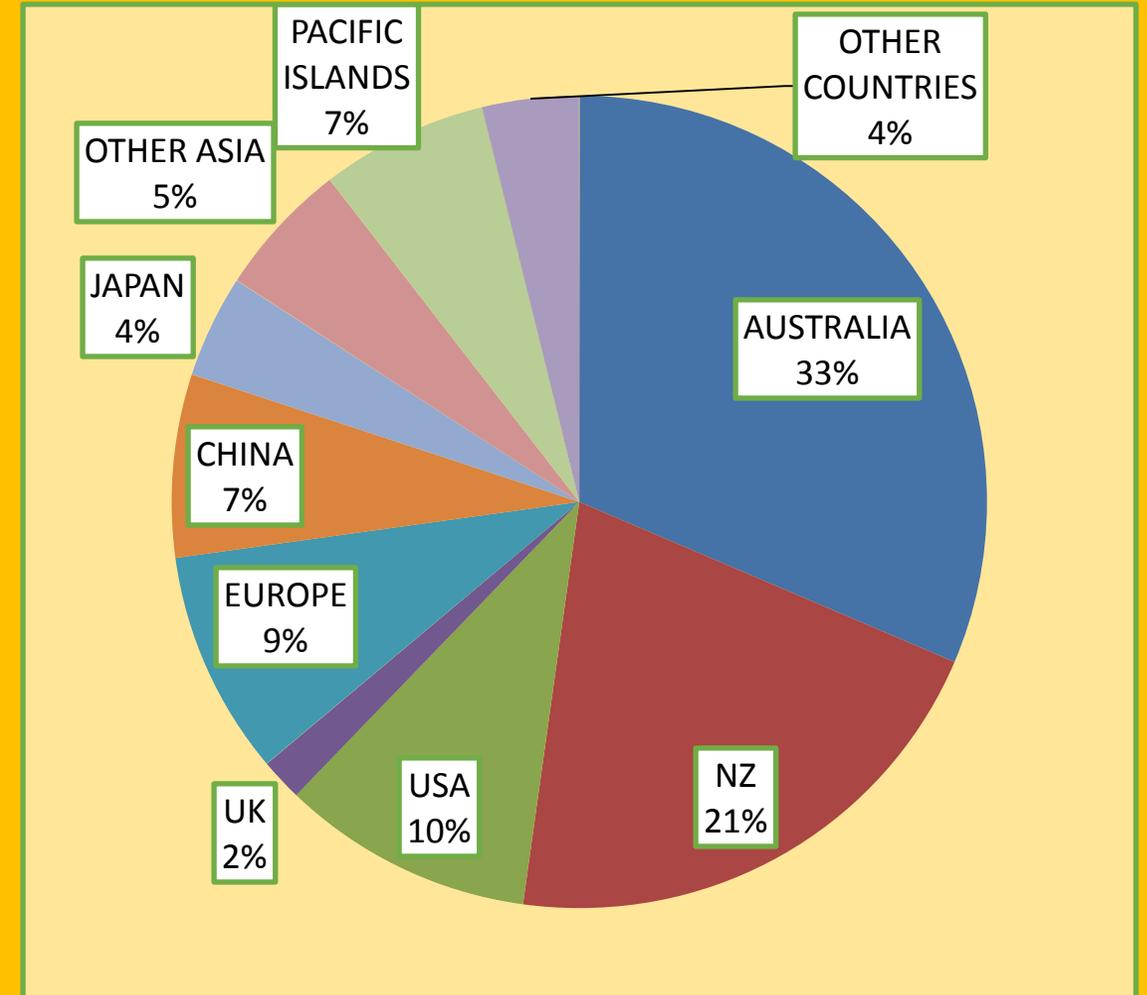
MAJOR SOURCE MARKETS FOR PICs - 2016



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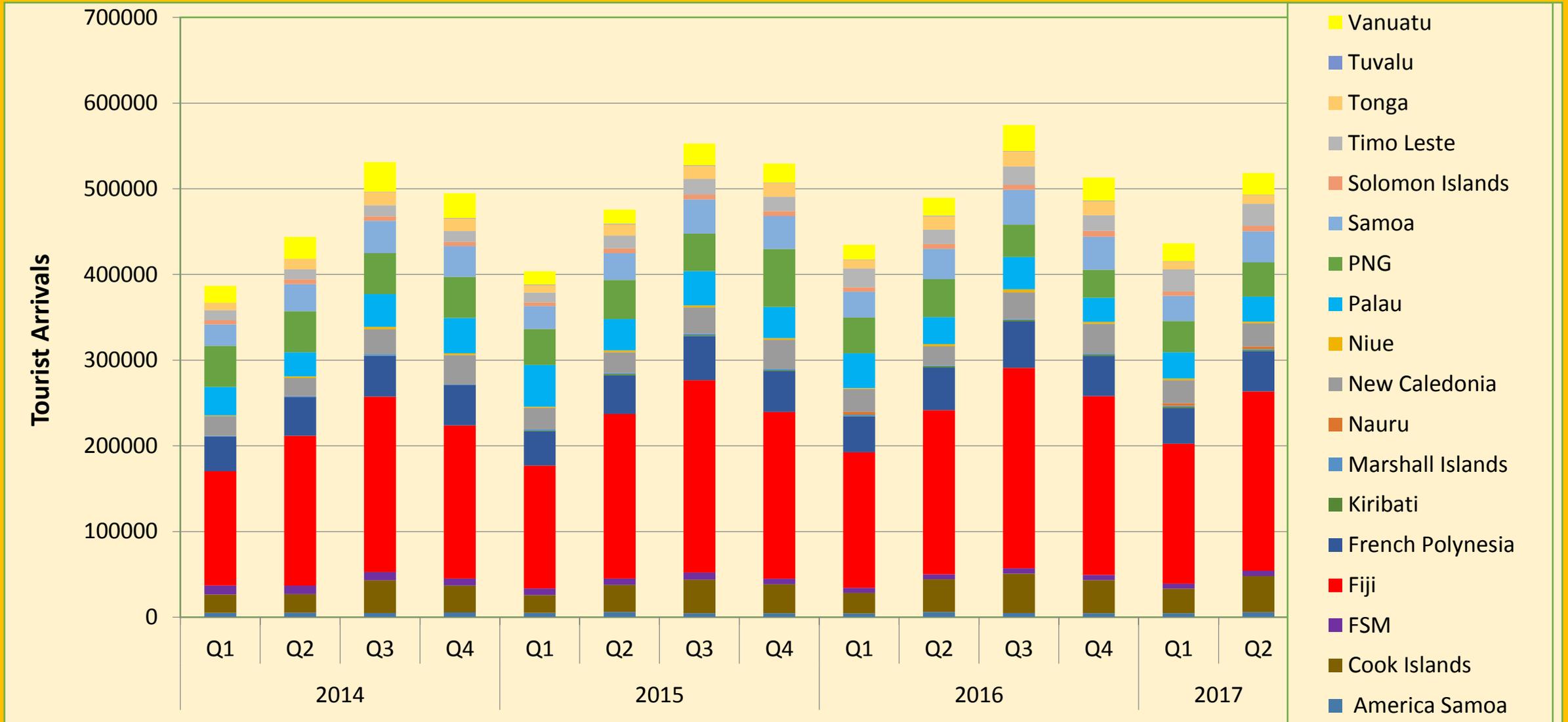
SOURCE MARKETS			Absolute Change	Growth(%)
	2015	2016	2016	2016
AUSTRALIA	616523	606864	-9659	-1.6
NZ	353460	400931	47471	13.4
USA	192987	192726	-261	-0.1
UK	36494	32446	-4048	-11.1
EUROPE	173278	172398	-880	-0.5
CHINA	153119	140468	-12651	-8.3
JAPAN	78704	78824	120	0.2
OTHER ASIA	112432	103616	-8816	-7.8
PACIFIC ISLANDS	125909	128228	2319	1.8
OTHER COUNTRIES	54645	73845	19200	35.1
Total	1897551	1930345	32794	1.7

Market Share (%)



Source: NTOs, NSOs & SPTO

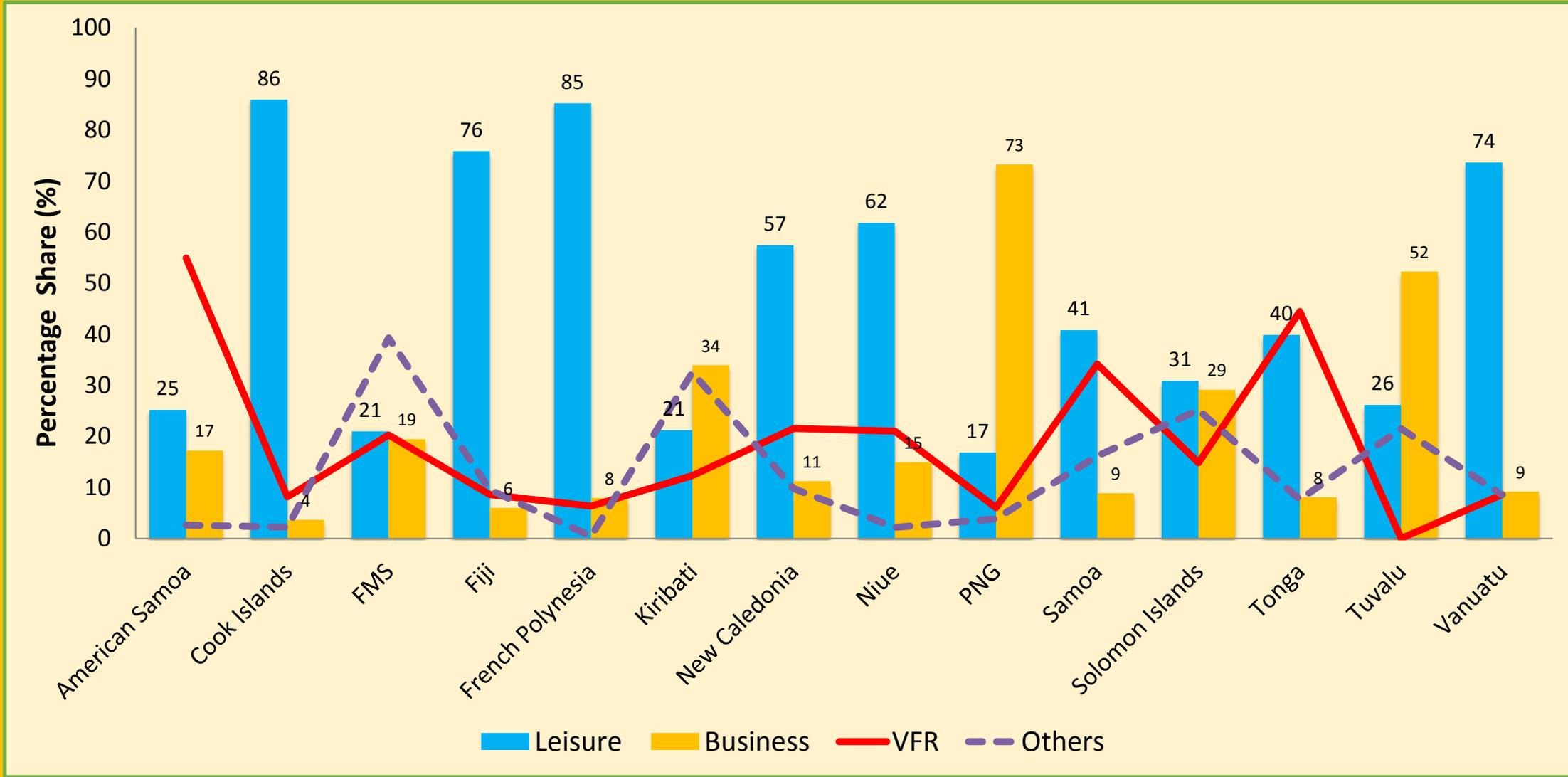
QUARTERLY VISITOR ARRIVALS Q1 2014-Q2 2017



BY PURPOSE, LEISURE TOURISTS DOMINATES PICS IN 2016



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Source: NTOs, NSOs & SPTO



FUTURE-POSITIVE FORECASTS FOR THE PACIFIC

- **SPTO forecast for 2017 - 4.1%** increase 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)



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PACIFIC TOURISM CHALLENGES

CONSTRAINTS TO REGIONAL GROWTH



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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



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

- Limited & expensive international and domestic air services
- Limited capacity among key 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



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THE PACIFIC IN EMBRACING SUSTAINABLE TOURISM



- **The protection of our natural environment is critical** so that it continues to be an attraction for visitors, thus ensuring the sustainability of our destinations.
- **Sustainable practices are pertinent** to ensure key players in the region are at the forefront of protecting our assets as our islands are prone to natural disasters and hazards.
- **The protection of its local environment is nothing new to the Pacific**– both land and sea – we have been custodians for many years and it is part of our culture and heritage!
- **PICs have progressed significantly, some more than others, in embracing sustainable tourism.** Example-Fiji vs SISs!
- **Our culture and heritage is a niche tourism product and needs protection and conservation** to ensure it does not die!



- **Ministers of Tourism in the Pacific have recognised the importance of sustainable tourism development and their member governments are at various stages of commitment and development.**
- **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 and Niue in September 2017. Other PICs have included sustainable development in their overall tourism strategies & plans.**
- **Donors/development partners have also assisted in the implementation of sustainable tourism development projects and programs in the Pacific e.g. EU, UNDP, STI etc.**
- **Key regional agencies and NGOs have embraced sustainable tourism, adopting effective sustainable tourism practices and initiatives, e.g. SPREP, SPC, PIFS, IUCN, PIDF etc**



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SPTO's SUSTAINABLE TOURISM OBJECTIVES & ROLES



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, the Pacific Tourism Strategy 2015-2019 and national priorities of its members**



SPTO's role in supporting Pacific island countries in their journey to become sustainable tourist destinations through:

- **Awareness and training** amongst stakeholders
- Establishment of a **robust regional policy framework** for sustainable tourism development.
- Provide **technical support** to the development of national policies & strategies.
- **Creation of new and strengthening existing partnerships** to foster sustainable growth at all levels.
- **Strengthen multi-sectoral linkages** to support sustainability efforts in the tourism sector.
- **Advocate and mobilise funding and technical support** to resource sustainability initiatives.



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SPTO's SUSTAINABLE TOURISM ACTIVITIES



2017 IYSTD Initiatives

- **Launch of the 2017 IYSTD in May 2017** during the South Pacific Tourism Exchange (SPTE) 2017
 - **Press Conference** at SPTO
 - **Formal launch** at the IYSTD – press conference and cocktails
- **IYSTD online campaign** on SPTO's Social Media Platforms – Facebook, Twitter, Instagram. Ongoing.
- **Application to the UNWTO for Affiliate Membership**
- **Partnership with a number of SPTO member countries** in the implementation of their national initiatives to celebrate 2017 IYSTD.
- **Development of the EIA Guidelines for Coastal Tourism Development** in partnership with the Secretariat of the Pacific Regional Environment Programme (SPREP)
- **Paperless meetings** for SPTO Board of Directors and Council of Ministers meetings in October
- **CEO's and Management presentations** at national, regional and international forums **have promoted the 2017 IYSTD**, as well as staff's e-signatures on emails.

Regional Sustainable Tourism Development



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- SPTO has reached out to **seek and establish partners with key international and regional agencies as well as NGOs** that have embraced sustainable tourism. e.g. **UNWTO, UNEP, STI, SPREP, SPC, GGGI, IUCN, PIDF, WWF** etc.
- **Blue Days Project (2015 SPREP led with SPTO support)**
 - Promoting ecotourism as a tool for conservation of iconic marine species
 - French Government support
- **Ecotourism (Joint initiative SPREP & SPTO)**
 - Assessment on the current opportunities for the development of Ecotourism in the Pacific
 - Joint efforts to fund-raise
- **Sustainable Tourism Enterprise Program (STEP) for the South Pacific (UNDP, STI & SPTO)**
 - Development of a Sustainability Monitoring Program for the Pacific (**Fiji & Samoa**)
 - **Online Toolkit to measure sustainability in the accommodation sector**
 - **Builds stakeholder and industry awareness of sustainable tourism** and monitoring of their sustainability performance for decision making



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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

PROBLEM

BENEFICIARIES

Accommodation providers in Fiji & Samoa

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

KEY STEPS

businesses trained
businesses collecting data
businesses improving impacts
impact reports produced

INDICATORS

Training of 50 businesses in Fiji & 30 in Samoa
Destination & regional data collation & reporting
Roadmap for project expansion

OUTCOMES

Improved data collection at scale
Heightened awareness of SCP
Improved decision making
Improved SCP practices

LONG TERM CHANGE



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PACIFIC SUSTAINABLE TOURISM CHALLENGES



- **Sustainable tourism practices can be expensive, e.g. developing toolkits to measure sustainability, transitioning to renewable energy and energy efficiency measures**
- **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 resource sustainability initiatives.**



- **Aligning the region's sustainable tourism programmes with the 2030 Agenda on Sustainable Development and the **SDGs** requires financial and technical support**
- **Varying levels of appreciation and commitment nationally & within the region**
- **Resource constraints for already struggling SMEs to implement best practice sustainable measures**
- **Key challenges in the PICs is high energy costs and waste management issues**
- **Weak Governance and Policy Framework and Enforcement Processes**
- **Lack of baseline data and robust systems to measure and monitor sustainability**



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PACIFIC SUSTAINABLE TOURISM OPPORTUNITIES



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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**

Traveler'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 destination, e.g. – swimming with the whales in Tonga etc**



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Introducing and adopting the Circular Economy (CE) to the Pacific



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- I was inspired with the concept of CE after attending the WCEF IN Helsinki, Finland from the 5th-6th June.
- Europe is leading in waste management and recycling. China and Japan are leaders in Asia. Hence, the Pacific needs a new way of looking at the relationships between markets, customers and natural resources.
- A need for the region to move away from the traditional “take-make-dispose” economic model to a a regenerative model (“take-make-reuse”) for the tourism industry, retaining as much value as possible from resources, produce, materials
- Becoming circular islands will assist our islands’ drive to achieve the UN’s SDGs.

Introducing and adopting the Circular Economy (CE) to the Pacific



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- **The Pacific's private sector can capture significant benefits from becoming circular businesses** (*e.g. increased growth, innovation and competitive advantage, cost reduction, reduced energy consumption and CO₂ emissions etc*)
- **It is easier to promote the CE concept to the private sector, compared to SCP.**
- **CE's reuse, refurbishment, remanufacturing and recycling ensures and encourages sustainability.**
- **The CE will assist the Pacific address its key challenges with waste management and high energy costs.**



WAY FORWARD

Share experiences and lessons learnt

Implement best practices

Need to accelerate Partnerships & funding

Commit to Small Steps is Better than No Commitment at all

Sustainability provides opportunities to diversify our product offering

Conserve resources and generate sustainable economic benefits for SIDS

Measuring Pacific Tourism Sustainability is Key for Future Planning

Introduce and adopt the circular economy into the Pacific



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CONCLUSION

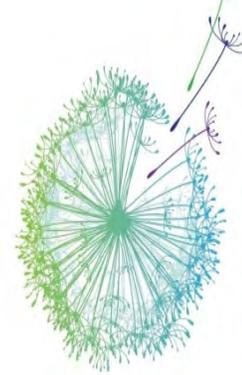
How Sustainable is Pacific Tourism?

- 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!



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2017 is a GREAT OPPORTUNITY TO START



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



<http://www.tourism4development2017>