



Pacific Tourism Update and Future Directions for Sustainable Tourism

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February 2015 by Filipe Tuisawau, SPTO*

SOUTH PACIFIC TOURISM ORGANISATION

- Mandated body for tourism sector development in the region
- Mission - "Market and Develop Tourism in the South Pacific"
- 18 Government members

American Samoa, Cook Islands, Fiji, Kiribati, Republic of the Marshall Islands, Nauru, New Caledonia, Niue, Federated States of Micronesia (FSM), Papua New Guinea (PNG), Samoa, Solomon Islands, French Polynesia, Timor Leste, Tonga, Tuvalu, and Vanuatu. The People's Republic of China is also a country member of the SPTO

- 200 private sector members
- Website address: www.spto.org

INTERNATIONAL TOURISM IN 2013

- There was an estimated 5% (52 million in absolute terms) increase in international tourist arrivals (overnight visitors) in 2013 reaching a record 1,087 million
- International tourism receipts reached US\$1,159 billion worldwide in 2013, up from US\$1,075 billion in 2012
- China remains the number one source market in 2013 when compared to 2012, spending US\$102 billion on international tourism
- Asia and the Pacific recorded the strongest growth with a 6% increase in arrivals followed by Africa (+6%) and the Europe (+5%)
- Oceania saw a 4% increase in international arrivals in 2013 with mixed results across individual countries

Source : UNWTO Tourism Highlights



CONTRIBUTION

Tourism Contribution to GDP in 2013* :

- 10.8% of the Pacific's GDP
- Fiji (37%), Kiribati(25%), Solomon Islands (13%), Tonga (16%) and Vanuatu (65%)

Tourism Contribution to Employment in 2013*:

Fiji (35%), Kiribati (21%), Solomon Islands (11%), Tonga (16%) and Vanuatu(55%)

LINKAGES

Tourism – Transportation, Agriculture, Fisheries

- Improving transportation infrastructure impacts other sectors e.g. aviation
- Increase in airline services → increase in freight capacity for fresh produce exports
- Increase in tourism activity positively impacts agriculture
- Servicing the tourism market increases growth in agriculture and other sectors → food and beverages, crafts, flowers, essential oils
- Local supply of marine products to hotels

* Source : World Travel & Tourism Council (WTTC)

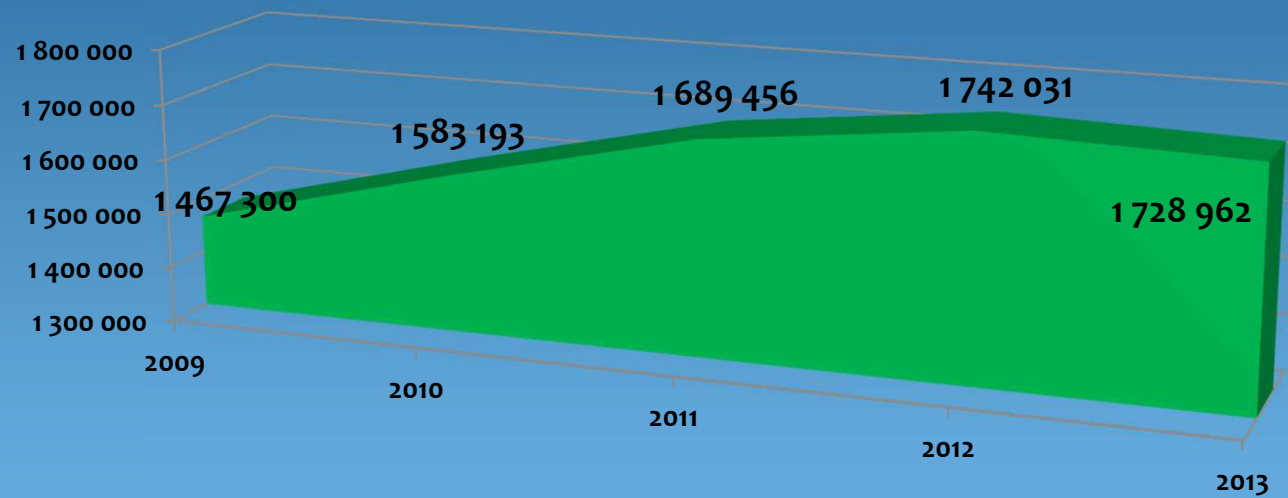


Visitor Arrivals into SPTO Member Countries, 2009-2013

Country	2009	2010	2011	2012	2013
American Samoa	30,705	29,060	28,403	22,579	20,846
Cook Islands	101,229	104,265	113,114	122,384	121,158
FSM	21,540	21,576	19,874	38,263	42,109
Fiji	542,186	631,868	675,050	660,590	657,706
French Polynesia	160,447	153,919	162,776	168,978	164,393
Kiribati	3,944	4,701	5,264	1,907	5,649
Marshall Islands	4,923	4,563	4,559	4,590	4,342
New Caledonia	99,379	98,562	111,875	112,204	107,753
Niue	4,662	6,214	4,920	5,048	7,047
Palau	71,887	85,593	109,057	118,754	105,066
PNG	125,891	146,933	163,173	169,975	182,188
Samoa	129,305	129,500	127,420	134,660	124,673
Solomon Islands	18,260	20,521	22,941	23,925	24,431
Tonga	50,645	47,081	46,005	49,010	50,191
Tuvalu	1,622	1,657	1,201	1,019	1,301
Vanuatu	100,675	97,180	93,824	108,145	110,109
Total	1,467,300	1,583,193	1,689,456	1,742,031	1,728,962

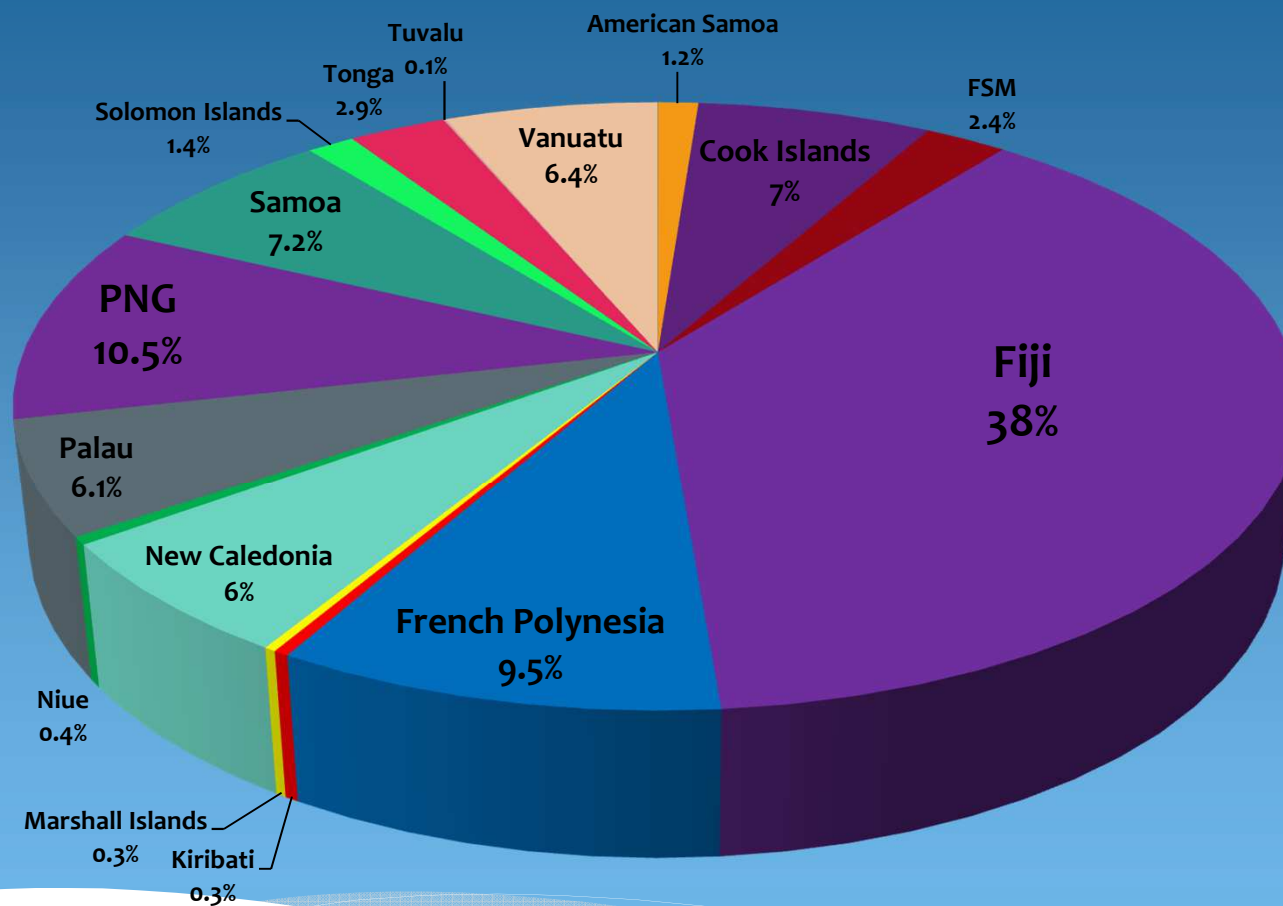
Source: NSOs, NTOs and SPTO

PIC 5-Year Visitor Arrivals 2009 - 2013



- Average annual growth 2009-2013: **+5 percent**

Visitor Market Share 2013



Major Tourism Markets

	2011	2012	2013	Average Growth (%)
Australia	573,442	576,485	582,143	2.3
NZ	294,217	293,888	288,230	0.9
Pacific Islands	127,826	134,451	130,619	1.6
USA	144,262	159,240	161,183	3.4
Canada	28,117	29,702	27,542	3
Europe	199,383	180,562	189,277	-0.3
Japan	85,592	88,264	82,321	-0.5
Other Asia	160,232	192,093	187,677	14.4
Other Countries	30,488	41,336	29,779	5.5

Summary of Major Markets

- * The major tourism markets for the region are Australia and New Zealand which account for over 50% of total arrivals.
- * North America and Europe account for a further 30%, whilst Japan and Asia account for 9%, with the Pacific (intra-regional) and other countries accounting for the remainder.

Tourism Development – PACIFIC Destinational CYLES

Tourism Development Category	Country
Advanced Group	Cook Islands, Fiji, French Polynesia New Caledonia, Samoa, Vanuatu.
Developing Group	Tonga, FSM, Palau, PNG
Nascent Group	Kiribati, Tuvalu, Niue and Nauru, Solomon Islands, Timor Leste.

PACIFIC Region Tourism SWOT

Strengths

Pacific – natural beauty, friendly people, strong values and culture, safety
 Pacific – shared identify (brand recognition) and shared markets
 Shared access and transport
 Unspoilt, unknown and unplanned destinations

Weaknesses

Tyranny of distance and access
 Small economies – limits resourcing for marketing, investment, infrastructure, domestic tourism, human resources
 High cost of inputs and leakage
 Vulnerability to natural disaster
 Lack of planning and enforcement

Opportunities

Working together, sharing and learning
 Promotion common natural beauty, culture and brand
 Regional synergies – marketing, research, HRD, planning, cruise shipping, air access, product development

Threats

Competition
 Unsustainable and poorly planned development
 Climate change
 Economic Crisis
 Political Instability

- * The Vision for the tourism sector in the Pacific region, endorsed by the SPTO Board and Council of Pacific Tourism Ministers (Apia 2013), is that:

**** Tourism will inspire sustainable economic growth and empower the Pacific people'***

REGIONAL TOURISM OBJECTIVES

- * Increasing the Economic Benefits of Tourism
- * Conserving the region's highly distinctive environment and cultures
- * Ensuring visitors experience a safe environment and unique Pacific hospitality
- * Ensuring that the public and private sector and local communities work in an effective manner together

KEY CONSTRAINTS

- * 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
- * Limited international and domestic air services and high cost of infrastructure and 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 and complex land tenure systems
- * High vulnerability to natural disasters and climate change impacts

Sustainable Tourism Planning

- * **To strengthen the sustainable planning and management of the Pacific tourism sector**
- * *Support countries to develop and enforce planning control and development regulations and seek to incorporate these into National and Local level Tourism Planning*
- * *Develop and disseminate environmental guidelines for tourism operators and for tourists*
- * *Further integrate culture into tourism and positively use tourism as a tool for cultural retention and regeneration*
- * *Develop and disseminate Disaster Risk Management guidelines and train operators in implementation*

Sustainable Tourism Planning

- * *Implement the recommendations of the SPTO Green Tourism Plan in the areas of communications, mitigation and adaptation*
- * *Support the further development and implementation of national Biodiversity Strategic Action Plans*
- * *Support the enhancement of sustainable waste management policies and system in all Pacific countries*
- * *Reduce economic leakages and increase local linkages to productive sectors in all Pacific countries through the production and dissemination of Pacific best practice guidelines and advocacy*
- * *Support pro-poor tourism initiatives within PICs through dissemination of best practice and integration of pro-poor 'best practice' into national tourism policies and plans*



CONCLUSION

- Tourism as a services sector is also labour-intensive, impacting other sectors (Agriculture, Fisheries, Transport); sustainable linkages must be supported
- Untapped potential should be developed and properly managed to significantly contribute to sustainable growth
- Requires continuing support and commitment from key stakeholders, including the private sector
 - implementation of relevant policies and budgetary provisions for infrastructure development, at national level; regional level through the SPTO including Sustainable Tourism Initiatives
- The economic benefits of tourism offers the best hope in Pacific Island countries; however, we have to manage our resources through green tourism initiatives to ensure the sustainability and profitability of the sector



THANK YOU FOR YOUR ATTENTION

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