

SOUTH PACIFIC
TOURISM
ORGANISATION

Pacific Environment Forum

Session 3: Plan with Nature at Home

Tourism and the Environment in the Pacific

18 September 2017

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Welcome to the Pacific
“OURS IS YOURS to Travel, Enjoy, Respect”



PRESENTATION OVERVIEW

- **SPTO in Brief**
- **Overview of Tourism in the Pacific**
- **Pacific Tourism and Environmental Challenges**
- **Pacific Tourism and Environmental Opportunities**
- **Way Forward**
- **Conclusion**

SPTO IN BRIEF

- **Inter-governmental body mandated to ‘Market and Develop Tourism in the South Pacific’**
- **Vision: Inspire Sustainable Growth and Empower Pacific People**
- **Key Strategic Areas of Focus:**
 - Marketing
 - Research and Statistics
 - Human Resource Development and
 - Sustainable Tourism Development
- **17 Pacific Island countries + China**
- **Over 100 Private Sector members**
- **Array of multi-stakeholder partners, donors and strategic alliances**

The Islands of the Pacific

SPTO MEMBER COUNTRIES



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United States
of America





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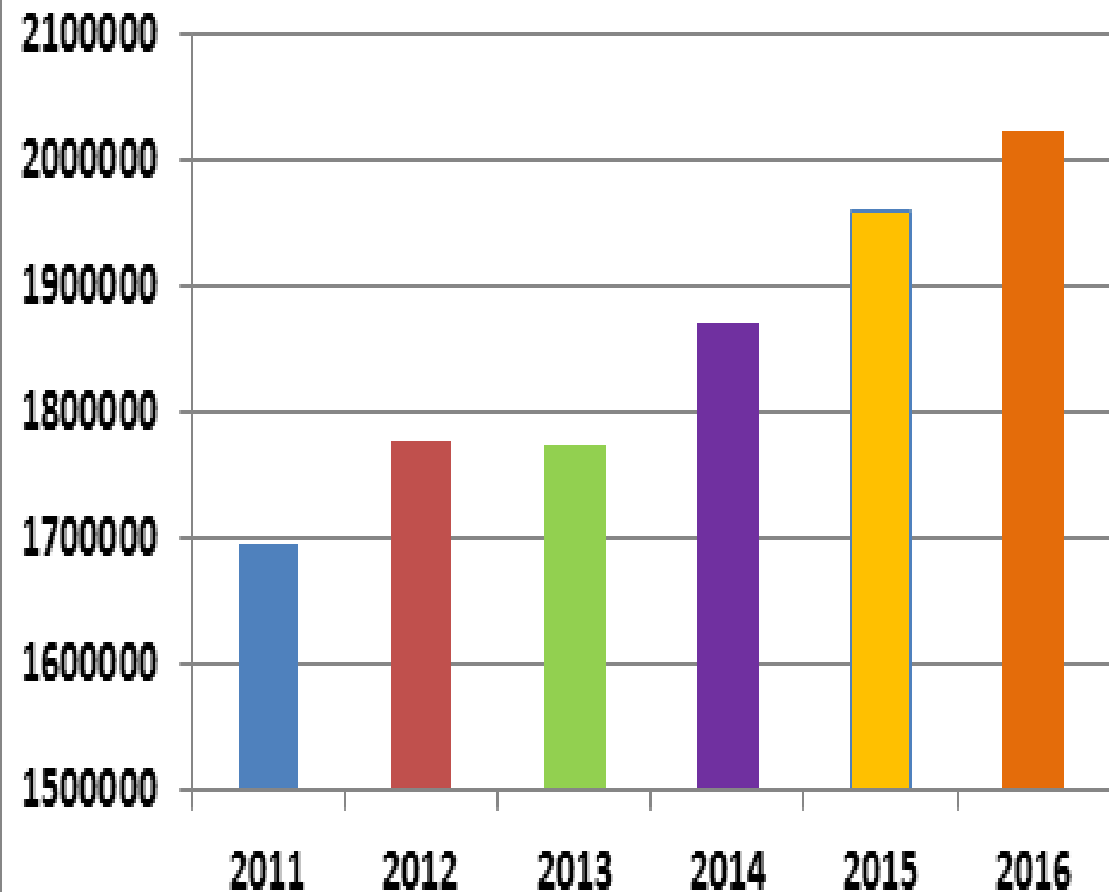
Overview of Pacific Tourism

Snapshot of Pacific Tourism Performance



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Visitor Arrivals to PICs (2011-2016)



- ❑ Total arrivals to the Pacific grew from 1.6m (2011) - **2m (2016)**
- ❑ Approx. **0.16%** destination share of **Global arrivals**
- ❑ **4.3%** Average annual regional growth over last six years (2011-2016).
- ❑ **54%** visitor traffic from **Australia** (33%) and **NZ** (21%)
- ❑ **49%** from **Other Markets** – Europe, USA, Japan, China
- ❑ Estimated **contribution of 3.3 US billion**
- ❑ Est **over 61,400 direct employment** (SPTO HRD Plan Employment estimates 2013)

Annual Visitor Arrivals by Destination: 2011- 2016



Destination	2011	2012	2013	2014	2015	2016
Fiji	675,050	660,590	657,706	692,630	754,835	792,320
PNG	165,059	175,203	182,188	191,442	198,685	155,789
French Polynesia	162,776	168,978	164,393	180,602	183,831	192,495
Palau	109,057	118,754	105,066	140,784	161,931	138,416
Samoa	127,420	134,687	124,673	130,653	139,043	144,883
Cook Islands	113,114	122,384	121,115	121,458	125,132	146,341
New Caledonia	111,875	112,204	107,753	107,187	113,951	120,255
Vanuatu	93,960	108,161	110,109	108,811	89,952	92,815
Timor Leste	36,209	34,902	44,146	48,986	61,037	71,680
Tonga	39,437	48,926	48,188	50,436	53,752	59,130
FSM	35,378	38,263	42,109	35,440	30,240	24,125
Solomon Islands	22,941	23,925	24,431	20,070	21,623	21,976
American Samoa	22,562	22,580	20,846	21,603	20,335	20,078
Niue	6,094	5,047	7,047	7,408	8,281	8419
Marshall Islands	4,559	4,590	4,333	4,776	4,756	5810
Kiribati	5,264	4,907	5,868		4,353	5018
Tuvalu	1,201	1,019	1,302	1,416	2,402	2267
Total	1,731,956	1,785,120	1,771,273	1,863,702	1,974,139	2,001,817

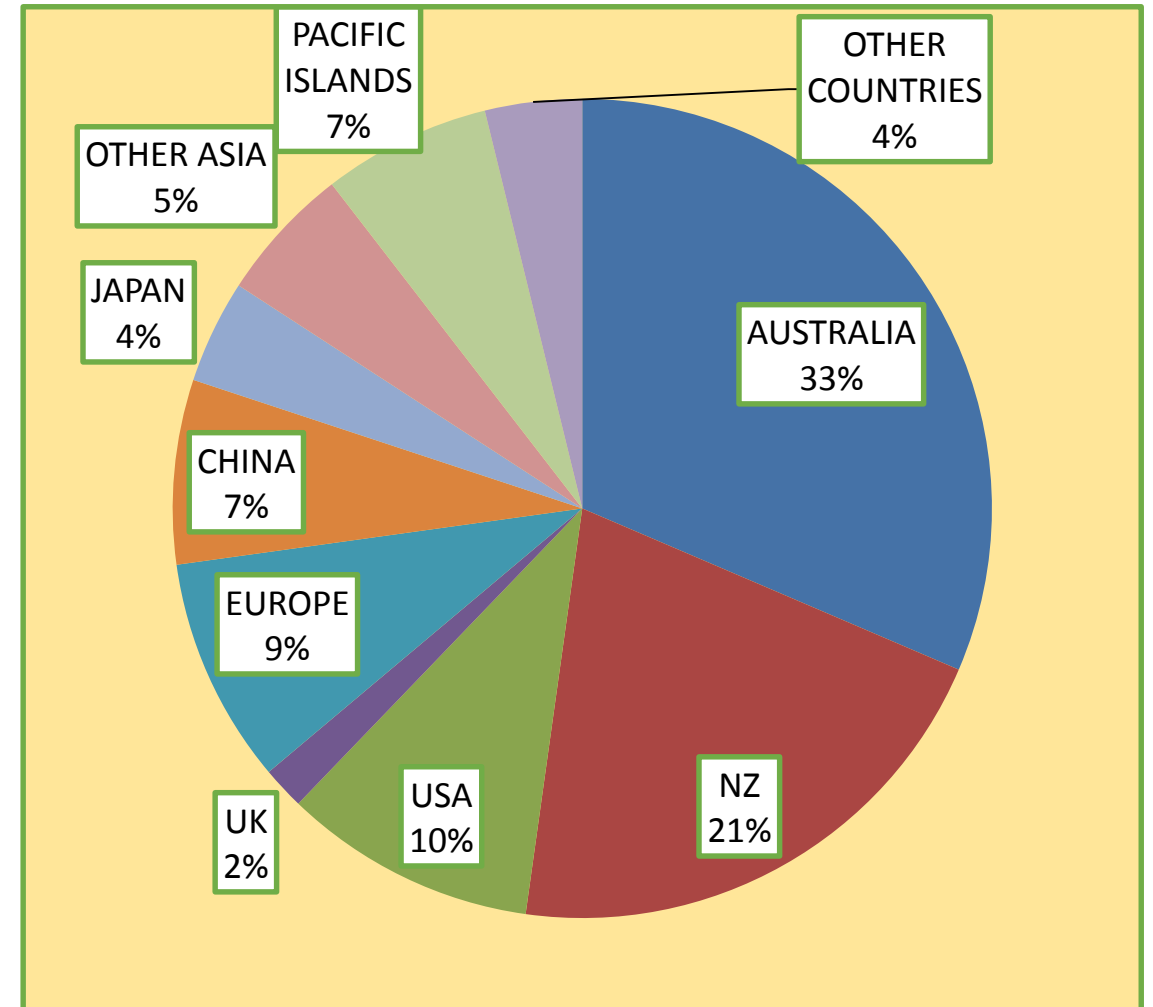
Source: NTOs and NSOs; Note: Figures in red are SPTO Estimates

Where visitors are coming from – Source Markets 2016

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

Source: NTOs, NSOs & SPTO

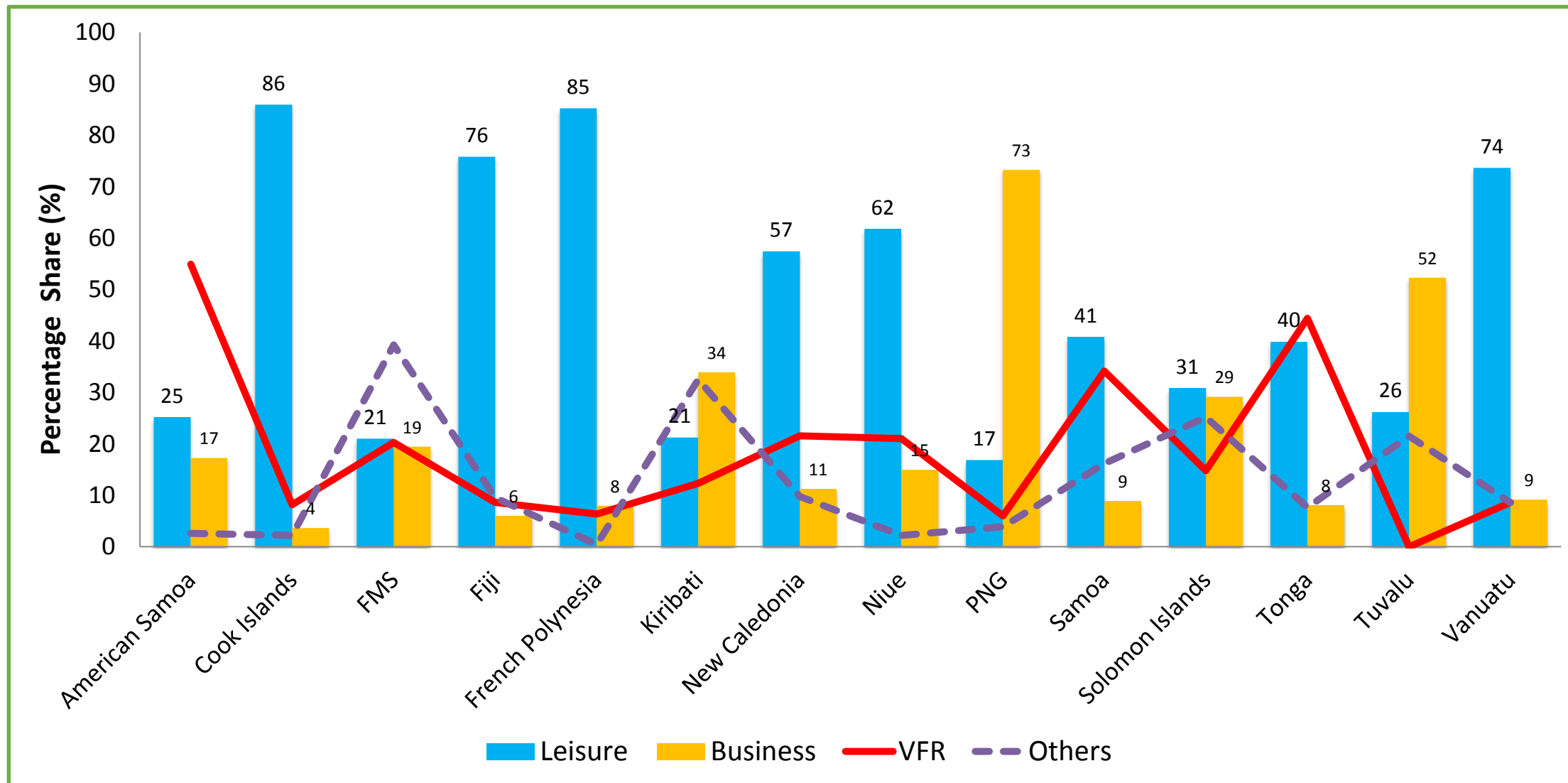
Market Share (%)



Why visitors travelled to the Pacific in 2016



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Source: NTOs, NSOs & SPTO



Future 'Positive' forecast for the Pacific

- **SPTO forecast for 2017 - 4.1% increase** visitor arrivals from 2016
- Forecasted economic contribution - **4.4 US billion 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 and Environmental Challenges

Environmental Challenges at Business Planning Stage:

- **Limited appreciation and awareness by new operators of the tourism sector and the environment**
- **Lack of proper research and business planning**
- **Unlicensed businesses operating illegally without Development Consents**
- **Weak policy enforcement resulting in major developments taking place without relevant approvals**
- **Absence of a robust legislative and policy framework to guide tourism development**

Environmental Challenges at Operational Stage:

- **Expectation that compliance with environmental standards is dependent on Government support/incentives**
- **Business viability issues resulting in negligence of responsibility towards the environment**
- **Limited capacity, awareness and advisory support from policy makers and sector practitioners**
- **Perception of the Environment as a cost rather than a safeguard for business viability**
- **Exposure to natural disasters and climate change impacts affecting business resilience**

Environmental Challenges at Operational Stage:

- **Sustainable tourism practices can be expensive, e.g. developing toolkits to measure sustainability**
- **Need to adapt to innovative financing models**
- **Low level of awareness amongst the tourism industry of environmental sustainability and its importance at all levels**
- **Lack of systems to measure and monitor performance**



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Pacific Tourism and Environmental Opportunities

Emerging aspirations of the new traveller



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- **Quieter, more discreet styles of experience are becoming highly desirable**
- **Seek spectacular landscapes, unspoilt nature, pristine environment**
- **Environmentally responsible and Culturally rich**
- **A growing desire to give back to the destination/communities**
- **Seek a compelling story they can tell - WOW factor in a destination**

Looking ahead to future opportunities



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- **SPTO's increasing focus on sustainable tourism development**
- **Pacific Sustainable Tourism Policy Framework**
- **Establishment of the Pacific Sustainable Tourism Network**
- **SPTO becoming a Affiliate Member of the United Nations World Tourism Organisation (UNWTO)**
- **Uptake by PICs of EIA Guidelines for Coastal Tourism Development in the Pacific Region**

Looking ahead to future opportunities



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- **Joint-partnerships in the pipeline for regional programmes**
- **Media, communications and outreach support**
- **Strengthened policy frameworks**
- **Platforms for sharing best practices**
- **Use of tourism as a tool to integrate cultural and economic aspects to drive environmental sustainability**
- **SPTO - Sustainability Management Programme**



WAY FORWARD

- **Share experiences and lessons learnt**
- **Need to accelerate Partnerships**
- **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**

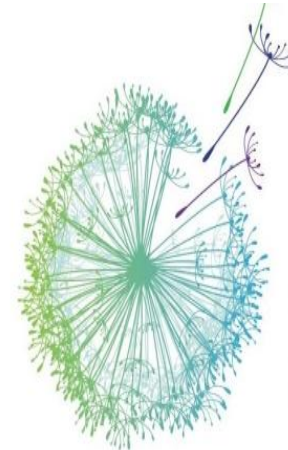
CONCLUSION

- **Sustainable planning and Management of Tourism, the only way to be one with Nature**
- **We are on the right track but much work still needs to be done.**
- **There is no quick fix.**
- **Attitude and behavioural change towards the environment is needed**
- **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>

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THANK YOU

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