Destination 2030 – The Power of Partnership to Transform Pacific Tourism

TOURISM AND SDGS IN THE PACIFIC

25 September 2018
Nadi, Fiji
Elizabeth Ragimana, Manager Research and Statistics
PRESENTATION OVERVIEW

About SPTO
Global and Pacific Tourism Performances
Why Sustainable Tourism Matters
Overview of Sustainable Tourism in the Pacific
Constraints and Opportunities
Tourism and the SDGs – the Pacific Perspective
Sustainability Monitoring Program
How Sustainable is Pacific Tourism
Conclusion
Way Forward
The Islands of the Pacific

SPTO MEMBER COUNTRIES
Our greatest assets in the Pacific are: OUR LAND, OCEANS, PEOPLE and CULTURE

We lose these key assets, we do not have TOURISM

Our diverse Culture differentiates us from our global competitors!
ABOUT SPTO

**Intergovernmental body for tourism marketing and development in the Pacific**

**17 PICs + China, Private Sector Members (130+) and 5 reps on the Board**

**Vision:** Inspire Sustainable Growth and Empower Pacific People

**Mandate:** Market and Develop Tourism in the South Pacific

**Partners/Strategic Alliances**

- National Tourism Offices (NTOs), EU, CROP, Pacific Islands Private Sector Organisation (PIPSO), PT&I network, Cruise Lines International Association (CLIA) Sustainable Travel International (STI), UNDP, Non-Government Organisations (IUCN, WWF and local NGOs)
GLOBAL AND PACIFIC TOURISM PERFORMANCES
International Tourist Arrivals 2017

<table>
<thead>
<tr>
<th>Region</th>
<th>Arrivals</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>671 Million</td>
<td>(51%)</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>324 Million</td>
<td>(24%)</td>
</tr>
<tr>
<td>Americas</td>
<td>207 Million</td>
<td>(16%)</td>
</tr>
<tr>
<td>Africa</td>
<td>62 Million</td>
<td>(5%)</td>
</tr>
<tr>
<td>Middle East</td>
<td>58 Million</td>
<td>(4%)</td>
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</table>

World: 1.3 billion
International Tourist Arrivals Growth

<table>
<thead>
<tr>
<th>Region</th>
<th>2017</th>
<th>Jan-Apr 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>6.8%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Europe</td>
<td>8.4%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Asia &amp; the Pacific</td>
<td>5.6%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Americas</td>
<td>3.3%</td>
<td>3.0%</td>
</tr>
<tr>
<td>Africa</td>
<td>9.0%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Middle East</td>
<td>4.6%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

Source: UNWTO World Tourism Barometer, June 2018
1.8 billion International Tourist Arrivals by 2030
Annual average growth: 3.3%
### PICs ANNUAL VISITOR ARRIVALS BY DESTINATION: 2013-June 2018

<table>
<thead>
<tr>
<th>Destination</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017 (R)</th>
<th>2018 (Jan-June)(R)</th>
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<tr>
<td>Fiji</td>
<td>657706</td>
<td>692630</td>
<td>754835</td>
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<td>121458</td>
<td>125132</td>
<td>146473</td>
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<tr>
<td>Samoa</td>
<td>124673</td>
<td>131719</td>
<td>136104</td>
<td>145176</td>
<td>155098</td>
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<tr>
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<td>105066</td>
<td>140784</td>
<td>161931</td>
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<td>60049</td>
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<td>PNG</td>
<td>184321</td>
<td>191442</td>
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<td>197632</td>
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<td>New Caledonia</td>
<td>107753</td>
<td>107187</td>
<td>114072</td>
<td>115676</td>
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<td>Vanuatu</td>
<td>110109</td>
<td>108811</td>
<td>89952</td>
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<td>52131</td>
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<tr>
<td>Timor Leste</td>
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<td>Tonga</td>
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<td>50436</td>
<td>53731</td>
<td>59130</td>
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<tr>
<td>FSM</td>
<td>42109</td>
<td>35440</td>
<td>30240</td>
<td>29485</td>
<td>30060</td>
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<tr>
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<td>24431</td>
<td>20070</td>
<td>21623</td>
<td>23192</td>
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<td>American Samoa</td>
<td>20846</td>
<td>21603</td>
<td>20335</td>
<td>20050</td>
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<td>4866</td>
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<tr>
<td>Kiribati</td>
<td>5868</td>
<td>5111</td>
<td>4353</td>
<td>5018</td>
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<tr>
<td>Nauru</td>
<td>3038</td>
<td>3002</td>
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<td>Marshall Islands</td>
<td>4342</td>
<td>4876</td>
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<td>5202</td>
<td>2916</td>
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<tr>
<td>Tuvalu</td>
<td>1302</td>
<td>1416</td>
<td>2402</td>
<td>2465</td>
<td>2466</td>
<td>1455</td>
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<td><strong>Total</strong></td>
<td><strong>1,773,458</strong></td>
<td><strong>1,869,979</strong></td>
<td><strong>1,972,281</strong></td>
<td><strong>2,051,613</strong></td>
<td><strong>2,137,182</strong></td>
<td><strong>986149</strong></td>
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</table>

Source: NTOs, NSOs & SPTO. Data in red are SPTO estimates based on averages of the past four months.
PICs & MAJOR SOURCE MARKETS % SHARE
2017

PICs % Share, 2017

Major Source Markets, % share, 2017
POSITIVE TOURISM FORECAST FOR PICS

Tourist Arrivals

- Total Annual Arrivals (RHS)
- Total Annual Arrivals % change (LHS)
- Average Annual growth (LHS)
## PICS TOURISM ECONOMIC CONTRIBUTIONS

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Number of Tourism Employees (1)</th>
<th>Number of Total Employment (2)</th>
<th>Tourism Employment as % of total Employment</th>
<th>Tourism Earnings as % of GDP (2017 Estimates)</th>
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<tbody>
<tr>
<td>America Samoa</td>
<td>2011</td>
<td>18,028</td>
<td>0.0</td>
<td>3.3</td>
<td>3.3</td>
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<tr>
<td>Cook Islands</td>
<td>2014</td>
<td>2386</td>
<td>6,938</td>
<td>34.4</td>
<td>69.1</td>
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<tr>
<td>FSM</td>
<td>2014</td>
<td>1802</td>
<td>6,938</td>
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<td>25.9</td>
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<tr>
<td>Fiji</td>
<td>2017</td>
<td>42300</td>
<td>303,647</td>
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<tr>
<td>French Polynesia</td>
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<td>10500</td>
<td>126,300</td>
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<td>Nauru</td>
<td>2017</td>
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<tr>
<td>New Caledonia</td>
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<td>4615</td>
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<td>2.4</td>
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<td>Niue</td>
<td>2014</td>
<td>226</td>
<td>700</td>
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<tr>
<td>Palau</td>
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<td>1172</td>
<td>6,000</td>
<td>19.5</td>
<td>6.7</td>
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<td>PNG</td>
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<td>21000</td>
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<td>2.3</td>
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<tr>
<td>Samoa</td>
<td>2016</td>
<td>4080</td>
<td>45,161</td>
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<td>20.4</td>
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<tr>
<td>Solomon Islands</td>
<td>2017</td>
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<td>208,016</td>
<td>3.1</td>
<td>10.4</td>
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<tr>
<td>Timor Leste</td>
<td>2014</td>
<td>2586</td>
<td>263,000</td>
<td>1.0</td>
<td>5.7</td>
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<td>Tonga</td>
<td>2017</td>
<td>6400</td>
<td>33,422</td>
<td>19.1</td>
<td>18.2</td>
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<td>Tuvalu</td>
<td>2014</td>
<td>87</td>
<td>3,869</td>
<td>2.2</td>
<td>6.9</td>
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<tr>
<td>Vanuatu</td>
<td>2017</td>
<td>11000</td>
<td>42,295</td>
<td>26.0</td>
<td>46.1</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>115,621</strong></td>
<td><strong>3,569,305</strong></td>
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</tr>
</tbody>
</table>

Source: NTO’s NSOs, World Tourism Travel Council, ADB & SPTO Estimates
WHY SUSTAINABLE TOURISM MATTERS TO THE PACIFIC
“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”

- UNWTO
TOURISM PROVIDES SUSTAINED SOCIO-ECONOMIC DEVELOPMENT WHILST PROTECTING OUR ENVIRONMENT

Source: NTOs, NSOs and SPTO, 2017
OVERVIEW OF SUSTAINABLE TOURISM IN THE PACIFIC
ESTABLISHMENT OF SUSTAINABLE TOURISM DEVELOPMENT

2014
- SAMOA Pathway (SIDS Accelerated Modalities of Action)

2015
- Global Sustainable Development Agenda (SDGs)
- Council of Tourism Ministers endorsement of a Sustainable Tourism programme for the Pacific

2016
- Set up of new division

2017
- January – Division fully operational
- UN International Year of Sustainable Tourism for Development
SPTO’S ROLE IN SUSTAINABLE TOURISM

- 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 relevant and beneficial to 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 & plans of its members.
SPTO’S SUSTAINABLE TOURISM FOCUS

- Awareness, education & capacity building
- Establishment of a Robust Regional policy framework
- Provide Technical support to SPTO members
- Establishment of strategic partnerships
- Resource mobilisation
SUSTAINABLE TOURISM CHALLENGES
HOW SUSTAINABLE ARE WE AS A REGION?

- Lack of baseline data and robust M &E systems to measure sustainability.
- Low level of awareness & appreciation of sustainable tourism at all levels and its importance to the Pacific
- Adequate technical expertise to assist in the planning and development of sustainable forms of tourism is lacking
- Lack of incentives for private sector investment in sustainability initiatives
Aligning the region’s sustainable tourism Programmes with the 2030 Agenda requires financial and technical support.

Resource constraints for already struggling SMEs to implement best practices. Sustainable tourism practices can be expensive. Most businesses are Micro-Small, Medium Enterprises (MSMEs).

High energy costs and waste management, are increasing concerns.

Governance and Policy Frameworks and Enforcement Processes requires strengthening.
SUSTAINABLE TOURISM OPPORTUNITIES
Technical and financial support for measuring and monitoring sustainability performance – E.g. upscale the SPTO Sustainability Monitoring Program as part of the Sustainable Tourism Enterprise Programme (STEP)

Strengthen governance and policy frameworks

Incentivize private sector e.g. through a Pacific Tourism Private Sector Support Facility

Explore effective partnerships within and outside the region

Support for targeted research in collaboration with partners
• Introduce sustainable waste management options and systems in the Pacific for effective recycling.

• Support to develop and promote Community Tourism in the Pacific

• Enhance partnerships to develop and promote marine eco tourism and Cultural Heritage Tourism

• Establish and strengthen the Pacific Sustainable Tourism Network to share experiences, best practices, information and lessons learnt
TOURISM AS A DRIVER FOR SDGS IN PACIFIC SIDS
Specific Targets for Tourism

8.9 To devise and implement policies to promote sustainable tourism that creates jobs and promote local culture and products

12.b Develop and implement tools to monitor sustainable tourism which creates jobs, promotes local culture and products

14.7 by 2030 increase the economic benefits to SIDS and LDCS from the sustainable use of marine resources, including sustainable management of fisheries, aquaculture and tourism
PARTNERSHIPS

WHAT IS WORKING

- Pacific leaders commitment to achieving the SDGs and S.A.M.O.A Pathway
- Pacific Sustainable Monitoring Programme for Accommodation Sector (SPTO) piloted in Fiji and Samoa
- SPTO-UNDP Green Tourism Project
- Tourism and Health (SPTO and WHO)
- SPREP-IUCN Climate Resilience Proposal to the Green Climate Fund
SPTO – CTA Partnership on Agritourism

SPTO-UN Environment Partnership Project Proposal on Climate resilience, zero emissions tourism sector

SPTO Partnership with SPREP on:
- Environmental Impact Assessment Guidelines for Coastal Tourism development
- IUCN Coastal Resilience project proposal to the Green Climate Fund
- Climate Resilience proposal for Tourism Sector

Energy Programmes with SPC, IRENA and the Global Green Growth Institute

SPTO-UNDP Partnership with Fiji private sector on marine ecotourism
AREAS WHERE PARTNERSHIPS ARE NEEDED:

✱ Sustainable tourism research and statistics

✱ Supporting sustainable measures to reduce waste management & energy costs specifically for the tourism private sector.

✱ Supportive partnership to compliment resourcing for SDGs

✱ Support to increase enforcement capacity for existing policies and legislations
THE APPROACH

Determine destination priorities
Consultation with hotel operators
Test data collection with small groups
Develop Pilot Tool & Monitoring System and Training modules and incentives
Train hotel operators on sustainability and monitoring
Collect Impact reporting data and stories from participating hotels
Project review and expansion roadmap
The Program was motivated by the need to address the various environmental, socio-cultural, and economic challenges that the Pacific Islands face.

- Harm to fragile marine ecosystems
- Excess waste and plastic pollution
- Increased vulnerability to climate change impacts
- Overconsumption of limited resources
- Loss of local cultural resources, traditions, and awareness
- Economic vulnerability and leakages
KEY BARRIERS PREVENTING IMPROVED SUSTAINABILITY IN THE SOUTH PACIFIC

• Businesses lack the tools, capacity, know-how to measure and improve

• Not perceived as a priority or worthwhile activity by businesses

• There is a lack of accurate and timely data to inform effective policy-making;

• Weak local socio-economic tourism supply chains
EXPECTED PROGRAM BENEFITS

- Increased resource efficiency across businesses
- A more resilient and cohesive tourism economy
- Heightened sense of community and shared responsibility and ownership for destination health
- Improved visitor experience that lives up to its promise, contributing to an increase in regional competitiveness without harming natural and cultural resources
EXPECTED PROGRAM OUTCOMES

**Short term**
- Hotels understand what sustainability means
- They are monitoring their performance
- Are taking actions towards reducing impact and increasing positive outcomes
- They are collecting and reporting trends
- There is consistent and reliable data for decision making

**Long-term**
- Efficiency in resource management is achieved
- Decreased waste pollution
- Improved local sourcing
- Less carbon emissions
- Promotion of authentic local culture
- Guests contribute to sustainability
ACHIEVEMENTS
### PROGRAM BENEFITS AND VALUES IDENTIFIED

<table>
<thead>
<tr>
<th>Benefits/Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Savings</td>
<td>Free tool, useful information and data, easy to use, simplified/more organized business management</td>
</tr>
<tr>
<td>Capacity-building</td>
<td>Efficiency, control, meeting consumer expectations, improved product quality and guest experience</td>
</tr>
<tr>
<td>Recognition</td>
<td>Local environment, local community/economy, destination attractiveness and competitiveness, drive destination and regional change</td>
</tr>
</tbody>
</table>
• **Sustainability Monitoring Toolkit Developed:** for businesses to track and report on their sustainability data

• **Capacity Building:** delivered trainings for hotels and partners and developed supporting resources.

• **Marketing and communications:** dissemination of Impact Stories that facilitate the exchange of knowledge and best practices, inspire innovation, and recognize participants for their achievements.
CONCLUSION
How Sustainable is Pacific Tourism?

- We are creating a culture of sustainable tourism led by Pacific Values
- Embrace sustainable development in our culture
- Integrate resilience-building measures to address climate change impacts and environmental challenges
- For the Pacific to be sustainable, we must change our economic, environmental and socio-cultural attitudes for a more coordinated approach
- Sustainability is a journey and we must work together to achieve the future we want!
WAY FORWARD

- We need the strong support of the development partners and donors (human & financial)

- Foster effective partnerships to pool resources, complement each other and avoid duplication

- Establish and strengthen the Pacific Sustainable Tourism Network to share experiences, best practices, information and lessons learnt

- Monitor and Measure sustainability performance is the Key for Future Planning. Support for improved monitoring systems is needed.

- Support for transitioning to green energy and tackling waste management issues are urgently needed.

- Access to financing and business-friendly financing modalities for private sector investment

- Take Action! - Implement best practices, start with the simple & less expensive!
THANK YOU

www.southpacificislands.travel