PRESENTATION OVERVIEW

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• Supporting Tourism at a Regional Level
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ABOUT SPTO

• Intergovernmental body for tourism marketing and development in the region

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

• 17 Pacific Island government members; China

• Private Sector Members

• Partners/Strategic Alliances
  European Union (EU), Council of Regional Organisations in the Pacific (CROP), Cruise Lines International Association (CLIA) Australasia, Pacific Trade & Invest (PT&I), Sustainable Travel International (STI), National Tourism Offices (NTOs)
PACIFIC ISLANDS - A Snapshot

- 16 Island countries; 1.8 million visitors in 2013
- Comprise of over 20,000 tropical islands
- Total population of about 10 million
- Spread over 50 million square kms of Pacific ocean
REGIONAL TOURISM PROGRAMME

1. **Sector Planning/Policy Development**
   - Support and strengthen national tourism planning controls, policies and development regulations
   - Promotion and development of sustainable tourism activities to support niche products such as eco-tourism, culture-tourism, heritage tourism and agro-tourism

2. **Marketing & Market Research**
   - Promotion in Long Haul, Emerging and Short Haul Markets
   - SME e-marketing support
   - Niche market studies

3. **Human Resources Development**
   - Regional HRD Plan
   - SME training workshops
   - Short Term Attachments
   - Hospitality Training
INTERNATIONAL TOURISM 2014

- International tourist travels - 4.3% growth to 1.13 billion
- International tourism receipts – 3.7% increase to US$1.25 billion
- Biggest tourist source markets – China, USA, France and Spain
- World’s top tourism source market – China, 19.5% increase to 107 million
- World’s top tourism spend – China, 27% increase to a total of US$165 billion
- Forecast for 2015 4% growth

Source: UNWTO Tourism Highlights, 2015 Edition
Pacific Island Countries – 5.7% increase to 1.8 million

Visitor arrival grew by 5.7% between 2013 and 2014

Australia continued its dominance as the largest tourist source market (34.7%) followed by New Zealand (19%)

Australia and NZ will continue to dominate the market in the future due to their proximity to the region
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<tr>
<td>Fiji</td>
<td>660,590</td>
<td>657,706</td>
<td>692,630</td>
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<td>French Polynesia</td>
<td>168,978</td>
<td>164,393</td>
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<td>PNG</td>
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<td>Samoa</td>
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<td>Cook Islands</td>
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<td>Palau</td>
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<td>105,066</td>
<td>140,784</td>
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<td>New Caledonia</td>
<td>112,204</td>
<td>107,753</td>
<td>107,187</td>
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<td>Vanuatu</td>
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<td>Tonga</td>
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<td>48,188</td>
<td>50,436</td>
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<td>Solomon Islands</td>
<td>23,925</td>
<td>24,431</td>
<td>20,061</td>
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<td>American Samoa</td>
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<td>20,846</td>
<td>21,603</td>
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<td>Niue</td>
<td>5,047</td>
<td>7,047</td>
<td>7,408</td>
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<td>Kiribati*</td>
<td>4,907</td>
<td>5,868</td>
<td>5,965</td>
<td>1.7</td>
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<td>Marshall Islands</td>
<td>4,590</td>
<td>4,342</td>
<td>4,776</td>
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<td>Tuvalu</td>
<td>1,019</td>
<td>1,302</td>
<td>1,416</td>
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<td>Total</td>
<td>1,740,694</td>
<td>1,715,190</td>
<td>1,813,793</td>
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## PIC Visitor Arrivals by Source Markets 2012-2014

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<td>Australia</td>
<td>556,728</td>
<td>578,513</td>
<td>583,782</td>
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<td>New Zealand</td>
<td>286,702</td>
<td>287,305</td>
<td>308,716</td>
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<td>USA</td>
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<td>154,554</td>
<td>171,688</td>
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<td>Europe</td>
<td>145,230</td>
<td>188,526</td>
<td>192,527</td>
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<td>Japan</td>
<td>69,806</td>
<td>81,962</td>
<td>85,683</td>
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<td>China</td>
<td>48,975</td>
<td>51,401</td>
<td>88,358</td>
<td>71.9</td>
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<td>Canada</td>
<td>25,117</td>
<td>26,603</td>
<td>27,650</td>
<td>3.9</td>
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<td>Other Asia</td>
<td>142,655</td>
<td>132,546</td>
<td>125,769</td>
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<tr>
<td>Pacific Islands</td>
<td>115,065</td>
<td>124,049</td>
<td>127,330</td>
<td>2.6</td>
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<td>Other Countries</td>
<td>25,773</td>
<td>26,929</td>
<td>25,828</td>
<td>-4.1</td>
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<tr>
<td>Total</td>
<td>1,570,717</td>
<td>1,652,388</td>
<td>1,737,331</td>
<td>5.1</td>
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Source: NTOs, NSOs and SPTO

NOTE: Above figures do not include Kiribati, Nauru, Solomon Islands, Timor Leste and Tonga
PIC VISITOR ARRIVALS BY SOURCE MARKETS 2012-2014

Source: NTOs, NSOs and SPTO
CHALLENGES TO TOURISM GROWTH

• Geographical spread and isolation of many PICs
  - cause of high domestic and international transport costs

• Lack of marketing and visibility of PICs in the source markets
  - High competition from other regional and national tourist destinations

• Limited infrastructure and capacities (cruise, aviation, telecommunication, utilities)
  - impedes competitiveness and the growth of tourism in most PICs

• Lack of skilled personnel in the tourism industry
  - increases need for continuous tourism HRD

• Weak institutional frameworks for foreign direct investment
  - lack of incentives to attract private sector investment in tourism
OPPORTUNITIES IN TOURISM

• Potential for increased participation and benefits for local communities
  ➢ Community-based tourism
  ➢ Culture and heritage tourism
  ➢ Niche market development

• Untapped potential for increased foreign direct investment

• Cruise shipping

• Improved aviation and market access

• Rationale for sustainable economic growth

• Private Sector Business Development - direct, indirect and induced
SUPPORTING TOURISM AT A REGIONAL LEVEL

Pacific Tourism Strategy 2015-2019

• Sets a strategic framework for the marketing and development of tourism at a regional level for the next 5 years 2015-2019

• Developed in consultations with 17 member PICs – governments, NTOs, CROP agencies, Private sector, Industry associations,

• Identified Four Strategic Objectives for Sustainable Tourism Dev:
  1. Increase visitor arrivals and economic benefits of tourism
  2. Conserve our natural environment and our cultures
  3. Promote coordination and participation between public, private and local community stakeholders
  4. Ensure best visitor experience – safe, pristine & friendly environment
SUPPORTING TOURISM AT A REGIONAL LEVEL

Regional Tourism Focus Areas 2015-2019

• Marketing
• Air Access - Support Improvements and Expansion
• Cruise Shipping Development
• HRD and Hospitality Training
• Investment and Product Development
• Research and Statistics
• Sustainable Tourism Planning
CONCLUSIONS

• Tourism as a services sector is also labour-intensive, impacting other sectors (Agriculture, Fisheries, Transport); Pacific as a whole has competitive advantage

• Untapped potential **must be developed and properly managed** to significantly contribute to economic growth while protecting the local environment

• Tourism in Pacific Island countries needs continuous development support
  - national level
  - regional level

• SPTO will continue to work closely and collaborate with lead technical agencies, development partners and donors
“Tourism will Inspire Sustainable Economic Growth and Empower Pacific People”

THANK YOU FOR YOUR ATTENTION