



FIJI NATIONAL SUSTAINABLE TOURISM FRAMEWORK

PHASE A:
**SETTING A STRATEGIC
FOUNDATION**



Ministry of
Tourism and
Civil Aviation

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ABBREVIATIONS

ACCF	Accident Compensation Commission Fiji
CFC	Care Fiji Commitment
DFAT	Department of Foreign Affairs and Trade (Australian Government)
ECAL	Environment and Climate Adaptation Levy
EIA	Environmental Impact Assessment
EFL	Electricity Fiji Limited
FAL	Fiji Airports Limited
FBoS	Fiji Bureau of Statistics
FCEF	Fiji Commerce and Employers Federation
FHTA	Fiji Hotel and Tourism Association
FNPF	Fiji National Provident Fund
FNU	Fiji National University
FRA	Fiji Roads Authority
FRCS	Fiji Revenue Customs Service
GDP	Gross Domestic Product
GGGI	Global Green Growth Institute
GSTC	Global Sustainable Tourism Council
IFC	International Finance Corporation
IVS	International Visitor Survey
JICA	Japan International Cooperation Agency
LOUs	Landowning Units
MFAT	Ministry of Foreign Affairs and Trade (New Zealand)
MICE	Meetings, Incentives, Conferences and Events
MRMDDM	Ministry of Rural and Maritime Development and Disaster Management
MSAF	Maritime Safety Authority of Fiji
MSME	Micro, Small and Medium Enterprise
MTCHA	Ministry of iTaukei Affairs, Culture, Heritage and Arts
MTCA	Ministry of Tourism and Civil Aviation
MTCSC	Ministry of Trade, Co-operatives, SMEs and Communications
NGO	Non-government Organisation
NSTF	National Sustainable Tourism Framework
NSTFSC	National Sustainable Tourism Framework Steering Committee
PPD	Public-Private Dialogue
PSDI	Pacific Private Sector Development Initiative
PSTPF	Pacific Sustainable Tourism Policy Framework
RBF	Reserve Bank of Fiji
SME	Small and Medium Enterprise
SOFTA	Society of Fiji Travel Associates
SPTO	Pacific Tourism Organisation
TF	Tourism Fiji
TLTB	iTaukei Land Trust Board
TVET	Technical and Vocational Education and Training
USP	University of the South Pacific
VAT	Value-Added Tax
WAF	Water Authority of Fiji

EXECUTIVE SUMMARY

Background

The Fiji Government, through the Ministry of Tourism and Civil Aviation (MTCA), is developing a 10-year National Sustainable Tourism Framework (NSTF) that shares a collective vision for a sustainable Fijian tourism sector. With the support of the International Finance Corporation, (IFC), between August 2022 – May 2023, over 600 stakeholders took part in a series of public private dialogues and focus group discussions on a range of topics.

The NSTF will articulate the strategic direction of the tourism sector from 2024 to 2034, providing a blueprint for Fijians to develop and benefit from the country's tourism resources. The design of the NSTF is based on thorough research, qualitative and quantitative evidence, recommendations from the National Economic Summit held in March 2023 and broad stakeholder consultations and feedback from tourism and tourism-related industries, government, civil society, communities, and development partners.

The NSTF will lay out a clear policy direction, with the high-level framework accompanied by an initial three-year Action Plan (2024-2027) focused on the continued tourism recovery from the COVID-19 pandemic, mitigating future economic shocks and striving for sustainable growth. As the largest sector and an engine for growth of Fiji's economy, the NSTF and related strategies will underpin achievement of key national development goals.

A foundation in regional policy and collaboration

Fiji has signed the Pacific Leader's Sustainable Tourism Commitment and shares the Pacific Sustainable Tourism Policy Framework's values as the basis for localising and contextualising regionally agreed priorities into nationally led and driven priorities. The Pacific Sustainable Tourism Policy Framework (PSTPF) sets the vision, policies and actions needed to transform tourism to make it more sustainable and provide greater benefits to the communities of the Pacific. As the PSTPF articulates this vision for the region:

"Tourism is an economic powerhouse and one of the main pillars sustaining growth and development. It is the major driver of economic growth, foreign exchange earnings and employment and contributes to the achievement of the Sustainable Development Goals. This potential can only be realised by transforming to tourism that is prosperous, inclusive and resilient.

By 2030 we are empowered by, and benefitting from tourism that is resilient, prosperous and inclusive. It improves the wellbeing of our communities and protects, restores and promotes our cultures, islands and ocean ecosystems.

The Framework calls on all partners and stakeholders to co-ordinate and collaborate to advance this vision through a series of policies and actions that focus on:

- supporting prosperous and resilient economies
- empowering communities
- amplifying and promoting culture
- accelerating climate action
- protecting ecosystems
- building resilience."

What is the future we want for Fiji tourism?

Tourism stakeholders and our broader community want a tourism sector that actively contributes to fulfilling careers, quality employment, professional development and entrepreneurship; to safeguarding and promoting cultural heritage; to generating equitable community benefits; to protecting our unique biodiversity as responsible stewards of the marine and terrestrial environment, as well as, supporting the decarbonisation of the economy and addressing climate and disaster risks. To realise this future vision, several key challenges and barriers must be addressed, and consensus reached on critical issues to support a truly sustainable tourism sector.

“Our vision for tourism is one where every Fijian in the country that has an idea for a tourism business can make that a reality. Where our commitments made on the international stage to our oceans and our climate are translating into major investments in solar and improved waste and water management systems, where we get serious as an industry about engaging in conservation initiatives – not just tokenistic mangrove and coral planting, but experiences that educate and connect to broader efforts to preserve the bedrock of our industry – our people and our environment. We dream of an industry that is shaped by our own values of community, of buying crafts from Fijian artists, food from neighbouring farms, serving local dishes, allowing visitors to see beyond the big bula smile and get a deeper understanding of our country.”¹

- Kasi Taukeinikoro, Director of Rivers Fiji and co-founder of the Duavata Sustainable Tourism Collective



1 Speech given in October 2022 at the Fiji Hotel and Tourism Association-organised Tourism Talanoa Symposium.

EXECUTIVE SUMMARY

Where are we now?

Fiji is not starting from scratch. There are existing policies and commitments that impact the tourism sector. There are previous policies that have guided the sector upon which the National Sustainable Tourism Framework is building. Fiji has a thriving tourism industry that is surpassing expectations post-COVID. But there are challenges that must be addressed to strengthen the sector and its ability to positively impact the economy, and Fiji's society, culture and communities.



*Data source: Tourism Fiji, 2022 figures

EXECUTIVE SUMMARY



EMERGING TRENDS

Increasing localisation of tourism investments



Strong interest in experiential, culturally immersive, community and iTaukei-led tourism



Increasing use of technology and digital platforms



Increasing climate and disaster risks



Increasing industry-led training and upskilling focused on hospitality and sustainable practice



OPPORTUNITIES

Improved connectivity globally and domestically



Political will to accelerate policy reforms to reduce barriers to entry, promote tourism diversification and accelerate climate action



Market demand shifting to more sustainable, responsible and culturally-immersive travel experiences



Increasing demand for wellness and special interest segments, including creative and culinary experiences



Increasing opportunities for public-private partnerships for upskilling and training, environmental conservation and infrastructure development



Increased attention on authentic representation of culture, supporting opportunities for creative industries and tourism sector partnership



CHALLENGES

Labour retention



Poor infrastructure



Climate and biodiversity loss



A burdensome regulatory environment and poor coordination



Financing gaps that constrain investment for small and community-led operators



Over-reliance on traditional source markets of Australia and New Zealand



Concentration of accommodation and experiences in the Coral Coast-Nadi-Denarau area



Lack of timely access to data and information to inform decisions



Loss of cultural identity, traditional knowledge and skills



Large structural adjustment required to support a climate-resilient tourism sector



No common language or standards for destination sustainability leading to a risk of greenwashing



EXECUTIVE SUMMARY

Emerging Goals and Priorities at end of Phase A



Key takeaways from Phase A

- Increase attention to waste management
- Embed climate and disaster risk into relevant planning guidelines
- Improve monitoring and evaluation of sustainable tourism indicators
- Strengthen partnerships with conversation organisations
- Develop financing instruments targeting sustainability initiatives
- Accelerate decarbonisation and transition to carbon neutral transport systems
- Promote high-value, low-impact tourism
- Reduce tourism's impact on our environment and ecosystems
- Incorporate iTaukei principles and values of care and environmental stewardship

- Improve the policy and regulatory environment
- Promote a whole of society approach to tourism planning and development
- Maintain strong political will and stability
- Improve access to finance and nurture investments
- Grow and diversify our accommodation and experiences
- Introduce tourism standards
- Enhance staff retention, workplaces, frontline hospitality, skills development
- Improve tourism related-infrastructure
- Increase coordination, information and knowledge management and analytical capacity
- Improve guidance and skills for tourism entrepreneurs and businesses

- Protect our strong foundation: our people, environment, society and culture
- Embed environment, social and cultural sustainability across all aspects of tourism
- Develop public-private partnerships to promote cultural heritage conservation
- Encourage cultural diversity through the creative arts

- Strengthen entrepreneurship coaching and mentoring and access to finance for small and medium enterprises, community and iTaukei-led tourism
- Promote pride in the diversity of Fijian food and remove barriers to the development of culinary experiences and agritourism.
- Support the empowerment and leadership of women, youth and people with disabilities
- Adopt a whole of society approach to tourism planning and development

- 1 -

INTRODUCTION



1. INTRODUCTION

The Ministry of Tourism and Civil Aviation (MTCA), supported by the International Finance Corporation (IFC), is developing a 10-year National Sustainable Tourism Framework (NSTF) to outline a collective vision for a sustainable Fijian tourism sector.

As part of a two-phase process, this report summarises the process by which MTCA and IFC, guided by a sector stakeholder Steering Committee, have identified the key strategic objectives and priorities for the NSTF under Phase A of activities. Phase B will further articulate the framework as a strategic document based on these identified priorities and recommendations to provide a clear vision for the tourism sector, further crystallised through development of a shorter-term three-year action plan.

In doing so, the framework will articulate the strategic direction of the tourism sector from 2024 to 2034, providing a blueprint for Fijians to develop and benefit from the country's tourism resources. The design of the NSTF is based on thorough research, qualitative and quantitative evidence, recommendations from the National Economic Summit held in March 2023 and broad stakeholder consultations and feedback from tourism and tourism-related industries, government, civil society, communities, and development partners.

The NSTF will lay out a clear policy direction, with the high-level framework accompanied by an initial three-year Action Plan (2024-2027) focused on the continued tourism recovery from the COVID-19 pandemic, mitigating future economic shocks and striving for sustainable growth. As the largest sector and an engine for growth of Fiji's economy, the NSTF and related strategies will underpin achievement of key national development goals.

Fiji's tourism sector stakeholders have articulated a future in which tourism actively contributes to fulfilling careers, quality employment, professional development and entrepreneurship; to safeguarding and promoting cultural heritage; to generating equitable returns for landowners; to protecting Fiji's unique biodiversity and acting as responsible stewards of the marine and terrestrial environment as well as playing its part in reducing carbon emissions and addressing climate and disaster risks. To realise this future vision, several key challenges and barriers must be addressed, and consensus reached on critical issues to support a truly sustainable tourism sector.

Going forward, this paradigm shift also needs to be embedded in the approach to growing the tourism sector and attracting new investment. It is already reflected in Tourism Fiji's refreshed 2023 brand campaign, *'Where happiness comes naturally'*, developed in response to shifting market demand. Signifying a change in strategy to one that emphasizes attracting a more responsible and values-based traveller, Tourism Fiji's brand values and experience pillars point to a deeper connection to Fijian culture, community, and values than previous marketing campaigns.

*"Our vision for tourism is one where every Fijian in the country that has an idea for a tourism business can make that a reality. Where our commitments made on the international stage to our oceans and our climate are translating into major investments in solar and improved waste and water management systems, where we get serious as an industry about engaging in conservation initiatives – not just tokenistic mangrove and coral planting, but experiences that educate and connect to broader efforts to preserve the bedrock of our industry – our people and our environment. We dream of an industry that is shaped by our own values of community, of buying crafts from Fijian artists, food from neighbouring farms, serving local dishes, allowing visitors to see beyond the big bula smile and get a deeper understanding of our country."*²

- Kasi Taukeinikoro, Director of Rivers Fiji and co-founder of the Duavata Sustainable Tourism Collective

² Speech given in October 2022 at the Fiji Hotel and Tourism Association-organised Tourism Talanoa Symposium.



- 2 - DEVELOPMENT OF THE NSTF

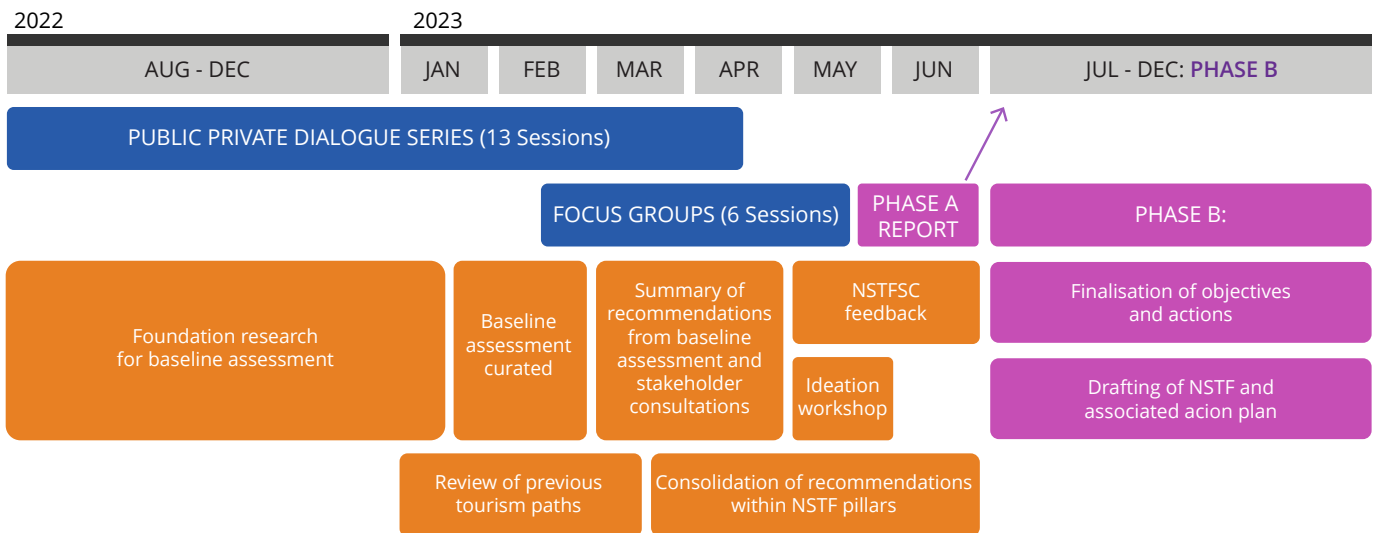
2. DEVELOPMENT OF THE NATIONAL SUSTAINABLE TOURISM FRAMEWORK

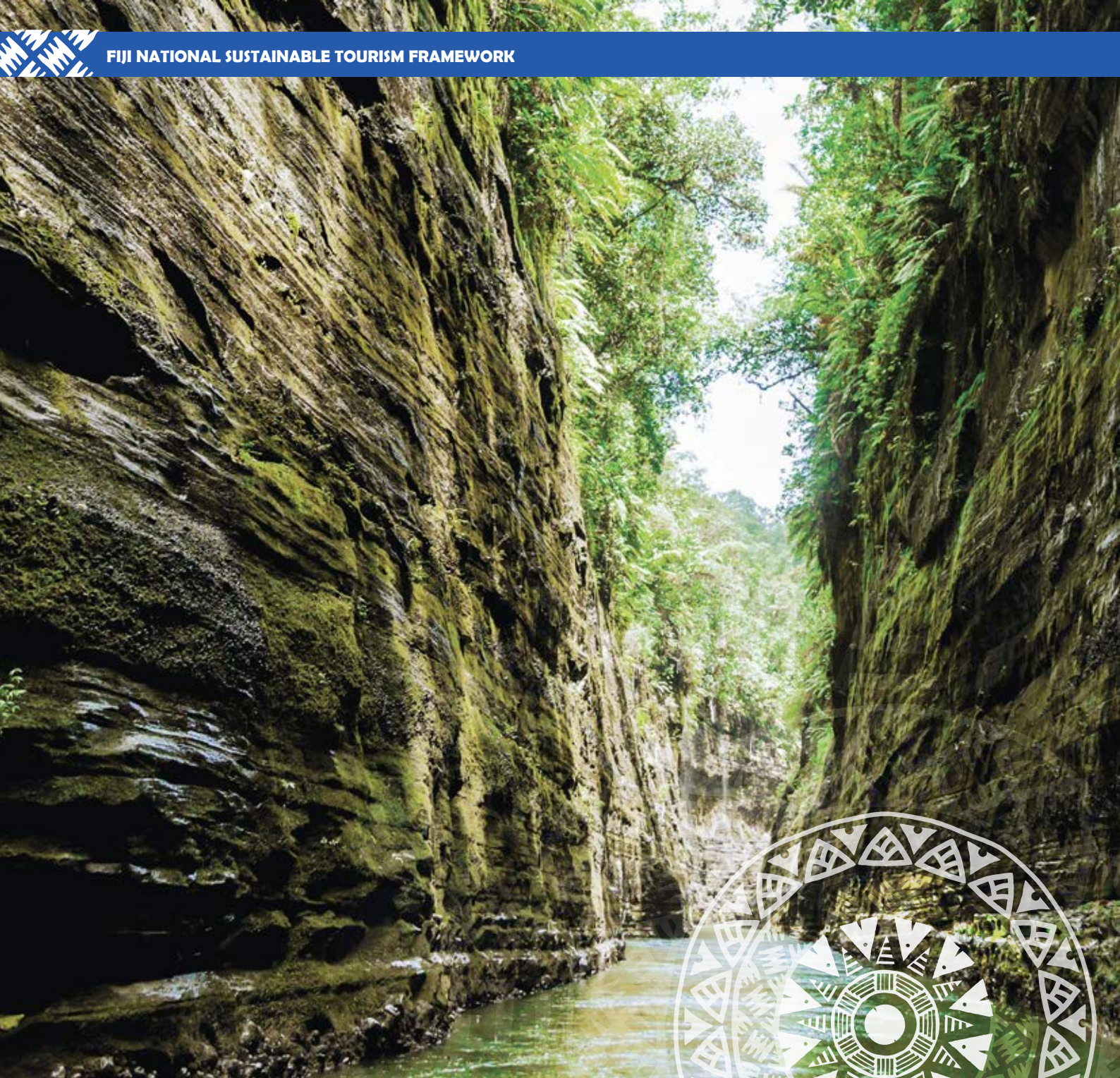
The NSTF's key objectives and strategic priorities are derived from extensive consultations reflecting the views and priorities of a wide range of stakeholders, as articulated to, and under the leadership of, the Ministry of Tourism and Civil Aviation. The Ministry-led NSTF Steering Committee (NSTFSC), including representatives from across the tourism industry, convened in December 2022 and met monthly to June 2023. The NSTFSC representative organisations are: Ministry of Tourism and Civil Aviation (MTCA - Chair), International Finance Corporation (IFC - Secretariat), Tourism Fiji (TF), Fiji Hotel and Tourism Association (FHTA), Fiji Airways (FA), Society of Fiji Travel Associates (SOFTA), Duavata Sustainable Tourism Collective (DSTC), Savusavu Tourism Association (STA), Taveuni Tourism Association (TTA), Kadavu Tourism Association (KTA), Tourism Suncoast (TS), Global Green Growth Institute (GGGI), Pacific Private Sector Development Initiative (PSDI), United Nations Resident Coordinators Office (UNRCO) and Talanoa Consulting (Consultant).

This report provides an overview of Phase A of the framework's development, including background research and outcomes from the first set of stakeholder consultations, and captures the emerging priorities of the industry to be reflected in the final framework. These priorities were validated by the MTCA, Tourism Fiji and the Fiji Hotel and Tourism Association (FHTA) during an Ideation Workshop in May 2023 as the concluding activity of Phase A.

Phase A therefore provides a summary of the views of the industry to inform and initiate discussions with the public sector and wider tourism stakeholders.

Figure 1. National Sustainable Tourism Framework Development Timeline





- 3 -

**FOUNDATION
RESEARCH**

3. FOUNDATION RESEARCH

Pacific 2030 Sustainable Tourism Policy Framework

The Pacific Tourism Organisation (SPTO) Pacific Sustainable Tourism Policy Framework³ provides a framework for localising and contextualising regionally agreed general priorities into nationally led and driven priorities. The MTCA are using this regional framework as the basis for the NSTF, following endorsement of this recommendation by the NSTFSC. The Executive Summary of the PSTPF (Box 1), articulates the purpose and intended use of the framework, as agreed by SPTO member nations, and endorsed through their individual commitments as signatories to the Pacific Leader's Sustainable Tourism Commitment⁴.

Box 1. The Pacific Sustainable Tourism Policy Framework (PSTPF)

The PSTPF sets out the vision, policies and actions needed to transform tourism to make it more sustainable and provide greater benefits to the communities of the Pacific.

Tourism is an economic powerhouse and one of the main pillars sustaining growth and development in the Pacific. It is the major driver of economic growth, foreign exchange earnings and employment and contributes to the achievement of the Sustainable Development Goals across the region. This potential can only be realised by transforming to a model of tourism that is prosperous, inclusive and resilient and supports sustainable recovery from the COVID-19 pandemic and other natural disasters. The transformation to a better tourism future begins with the implementation of the Pacific Sustainable Tourism Policy Framework.

The Pacific Sustainable Tourism Policy Framework reflects the aspirations of the SPTO and its members, the tourism industry, civil society organisations, regional organisations and global development partners. The shared vision is:

By 2030 we are empowered by, and benefitting from tourism that is resilient, prosperous and inclusive. It improves the wellbeing of our communities and protects, restores and promotes our cultures, islands and ocean ecosystems.

The Framework calls on all partners and stakeholders to co-ordinate and collaborate to advance this vision for sustainable tourism through a series of policies and actions that focus on:

- supporting prosperous and resilient economies
- empowering communities
- amplifying and promoting culture
- accelerating climate action
- protecting ecosystems
- building resilience.

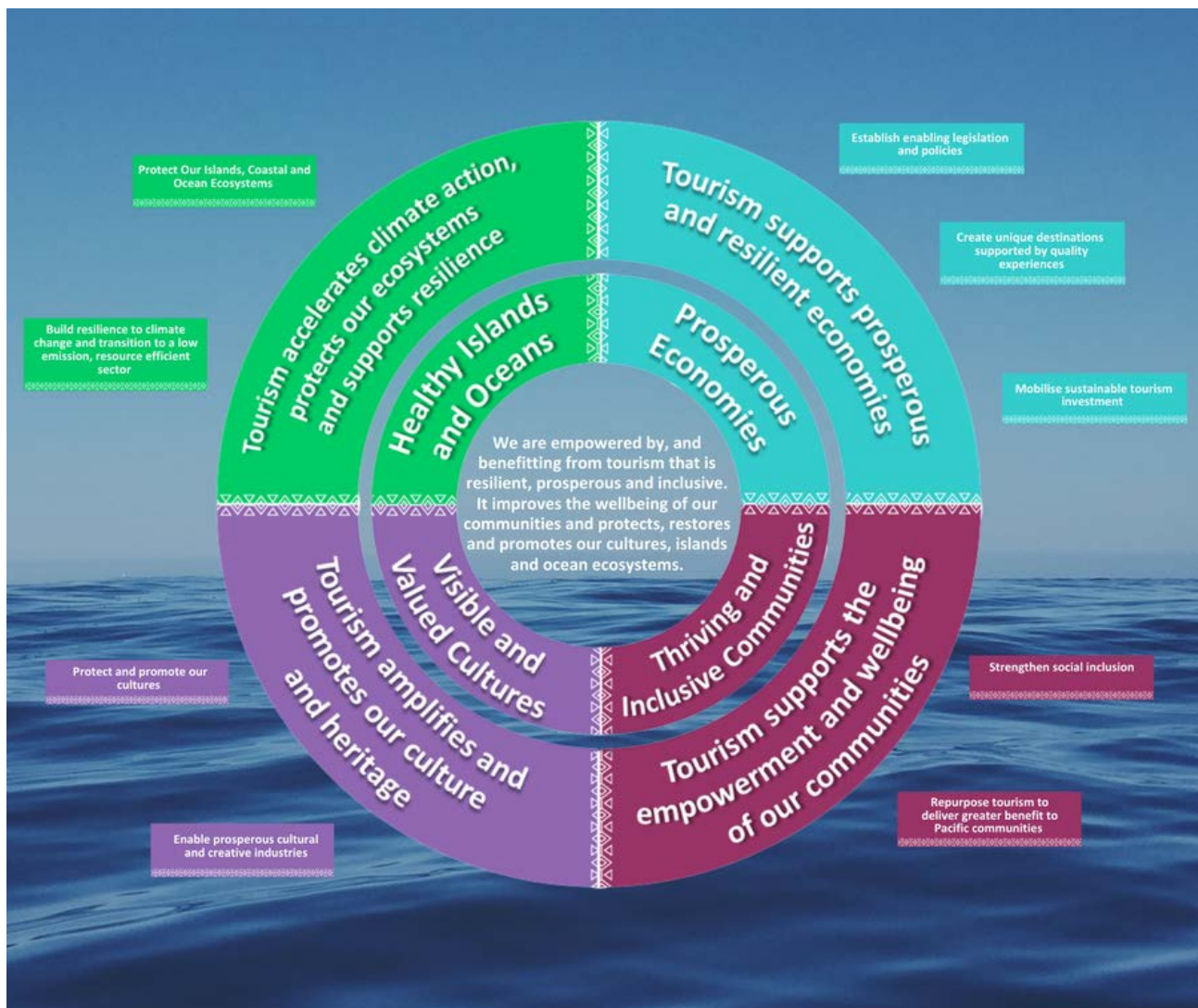
The Framework has been designed to cater for countries that are well advanced in developing and implementing sustainable tourism practices as well as for the countries that are in the early stages of sustainable tourism development.

To ensure that tourism in the Pacific continues to be a driver of economic and community wellbeing, all partners are required to implement the policies and actions in the Framework to build a resilient tourism industry, fit for the challenges and opportunities the Pacific faces between now and 2030.

³ Source: SPTO, Pacific 2030 Sustainable Tourism Policy Framework, April 2021, Executive Summary

⁴ 16 of 20 countries are signatories at time of writing. <https://southpacificislands.travel/pacific-leaders-sustainable-tourism-commitment-continues-to-attract-support/>

Figure 2. Pacific Sustainable Tourism Policy Framework: Goals and Priorities



Source: SPTO, Pacific 2030 Sustainable Tourism Policy Framework, April 2021

Literature review and data collection

An extensive literature review was undertaken, encompassing a wide range of reports and academic articles to synthesize current documentation relevant to sustainable tourism in Fiji. In addition to the literature review, the MTCA issued a request for information and data from government agencies and partners through its own internal networks and via the NSTFSC. This literature and information were consolidated within the individual background papers, that were then provided to the NSTFSC for its feedback. NSTFSC further inputs were incorporated, and the papers also leveraged the PPD and Focus Group Discussions (being conducted in parallel) for continual sense-checking and identification of additional relevant literature.

Annex 1 - Stakeholder consultations contains a list of all stakeholders consulted to date. These were primarily tourism industry stakeholders.

Annex 2 - Summary of key messages from PPD and Focus Group Discussions contains a summary of key messages from public-private dialogues (PPDs) and focus group discussions (FGDs) held with the tourism industry and related public and private sector as detailed in **Section 4. Stakeholder Engagement**.

Annex 3 - Literature Review contains the full list of all literature reviewed.



The background papers (not included here) are as follows:

- Visitor economy
- Policy review
- Market segmentation
- Product and asset inventory
- Financing and investment
- Workforce and skills assessment
- Environmental, social and cultural sustainability
- Risk and resilience
- Monitoring

World Bank Assessment: Ecosystem Resilience and Sustainable Tourism in Fiji

In parallel with the MTCA and IFC-led activities for NSTF development, the World Bank and the Government of Fiji have agreed a substantial new tourism development program for Vanua Levu. As an early output of this program, and providing further analytical foundation for NSTF recommendations, the *“Assessment of Needs and Opportunities to Improve Ecosystem Resilience and Sustainable Tourism in Fiji”*⁵ is in final stages of preparation. The finalised Assessment will also support Fiji’s transition to a greener tourism sector that fosters resilience, economic sustainability, and community benefits by exploring various measures to promote biodiversity protection, adaptation, disaster risk management, cultural continuity, community engagement, and the growth of MSMEs.

Close collaboration of the IFC and World Bank teams has ensured that the stakeholder consultations have informed the Assessment findings, and the draft Assessment findings have in turn strengthened the NSTF background papers and provided an analytical underpinning of many of the stakeholder views expressed during the consultations. The recommendations outlined in **Section 5** - are limited to the PPD and FGD findings, to capture only those recommendations derived from the stakeholder consultations (which are not necessarily the views of nor endorsed by MTCA or IFC).

⁵ World Bank. Assessment of Needs and Opportunities to Improve Ecosystem Resilience and Sustainable Tourism in Fiji” Prepared by the Environment, Natural Resources, and Blue Economy Global Practice, funded by PROBLUE. Pending publication)

Baseline Assessment

The baseline assessment includes consolidated information from each of the detailed papers. The assessment provides an overview of the status of the tourism sector to ensure all stakeholders are working from the same shared understanding as a basis of future planning.

The baseline assessment is comprised of 11 topics. The topics are listed in the same sequence as the consultations were held, however they can be explored separately and in any order. Each topic includes a Key Messages and Recommendations box to allow the reader to move quickly through the key points.

The topics are as follows:

- **Topic 1: Improving the policy and regulatory environment**
- **Topic 2: Embedding sustainability across the NSTF**
- **Topic 3: The visitor economy**
- **Topic 4: Market segmentation**
- **Topic 5: Asset and experience inventory**
- **Topic 6: Sustainable Tourism Standards**
- **Topic 7: Financing and investment**
- **Topic 8: Workforce and skills assessments**
- **Topic 9: Environmental, social and cultural sustainability**
- **Topic 10: Enhancing risk management in tourism**
- **Topic 11: Monitoring and evaluation for sustainable tourism**

Topic 1: Improving the policy and regulatory environment

Key Messages and Recommendations:

- There are a wide range of actors involved in the policies and regulations that impact the tourism sector.
- Develop clear guidance that outlines the various agencies' responsibilities and streamline regulatory requirements to reduce regulatory uncertainty and costs for businesses and investors.
- Improve strategic alignment of policies designed to promote investment, nurture SMEs, protect the environment and accelerate climate action.
- Strengthen coordination, dialogue, information and advice across government and regulatory agencies.
- Accelerate policy reforms that can remove barriers to entry and promote tourism diversification.
- Shift the culture within key regulatory agencies from 'control' to 'facilitation'.

There are a wide range of government agencies and actors involved in the policies and regulations that impact the tourism sector. Stakeholders would benefit from the NSTF providing clear guidance on various agencies' responsibilities to reduce regulatory uncertainty.

At the strategic level, there is a need to align the NSTF with several existing policies and strategies, including the Green Growth Framework, the Climate Change Act and National Oceans Policy.

At the operational level, streamlining guidance on regulatory requirements affecting the tourism sector is necessary. Larger operators tend to navigate this space with the assistance of lawyers and accountants. Most smaller tourism operators currently muddle their way through the regulatory landscape, often discovering specific rules or requirements through business networks, other operators, and their own experiences.

MTCA is unusual in that it has a relatively limited legislative mandate relating to its portfolio. This requires a significant amount of time to coordinate across government agencies and statutory bodies. Its current capacity is insufficient to play this role effectively. The Ministry of Trade, Co-operatives, SMEs and Communications (MTCSC) similarly plays a vital coordination role in championing regulatory reforms to support business development.

There are numerous areas where strengthening coordination and the effectiveness of dialogue and advice could significantly enhance the enabling environment. Policy reforms to overcome barriers to entry for small and community-led businesses are essential for promoting the tourism diversification envisaged by policy and decision-makers. The MTCSC, MTCA and IFC are working on several reforms relating to hotel and liquor licensing to streamline these areas. Others in need of reform include maritime transport and multi-use lease arrangements. Improving the guidance available to new and existing operators and investors via the bizFiji online portal in development, Investment Fiji and other platforms would also help to address any confusion.

Shifting the culture within key regulatory agencies from 'control' to 'facilitation' would significantly enhance the experience of tourism operators trying to grow their businesses. The approach and actions of frontline civil servants in some agencies can be the difference between a business failing or succeeding. Targeted awareness and customer service training is needed within these institutions to support them in becoming cognizant of how important their role is in the bigger picture of Fiji's economic development.

Topic 2: Embedding sustainability across the NSTF

Key Messages and Recommendations:

- Fiji has made strong policy commitments to economic, environmental, social, and cultural sustainability across various international, regional and national policies, strategies and plans.
- Embed Fiji's relevant environmental, biodiversity, climate, renewable energy, culture, gender, and social policies within the National Sustainable Tourism Framework.
- Promote partnerships between tourism operators and communities to support conservation efforts through conservation leases (land), and informal or traditionally established marine managed areas.
- Integrate conservation, environmental and NGOs to the tourism value chain and promote public-private partnerships with tourism operators.
- Engage visitors to participate in sustainability measures as part of their experience in destination.
- Encourage cultural diversity through the creative arts — storytelling, local artisans, community-led jobs.
- Develop tools and processes and agree accountability for measurement of destination sustainability.
- Incorporate stewardship while safeguarding indigenous principles and values.
- Focus on high-value, low-impact markets.

Fiji has made strong policy commitments to economic, environmental, social, and cultural sustainability across various international, regional and national policies, strategies and plans.

This includes as part of the Climate Change Policy 2018-2030 and Climate Change Act, the Green Growth Framework, and the National Oceans Policy. By 2030, Fiji aims to source 100 percent of its electricity from renewable energy sources and be net-zero by 2050. Meeting these targets will require all sectors of the economy to transition to a greener, more sustainable and resilient pathway.

Fiji is a signatory to various international conventions including the United Nations Framework for Action on Climate Change, Convention on Eliminating Violence Against Women, United Nations Declaration on the Rights of Indigenous Peoples and several others indirectly linked to the tourism sector.

Individually and collectively, they commit Fiji to mainstreaming environmental, social, and cultural considerations across all sectors of the economy, including tourism. The NSTF seeks to reflect these commitments.

The private sector has played an instrumental role protecting Fiji's natural biodiversity. The most formalised arrangements include businesses entering into conservation leases (land), and informal or traditionally established marine protected or managed areas. Examples include the Upper Navua Conservation Area, Namena Marine Reserve, and Vatu-i-Ra Conservation Park. A 2017 study identified 56 tourism operators committed, or becoming involved, in some form of marine conservation agreement with local communities, largely to set up temporary or permanent no-fishing zones or marine protected areas⁶. Tourism-related marine conservation agreements have contributed an estimated 266.25 square kilometres of marine protection over deep water and offshore reefs, as well as shallow fringing reefs and slopes in recent years.

6 Sykes et al. 2018a



There are opportunities to build on existing and strengthen partnerships between conservation organisations and tourism operators. Realising greater collaboration in this area will require the MTCA, TF, FHTA, SOFTA and other tourism actors to play more active roles as knowledge brokers between conservation and environmental groups and supporting them to understand tourism value chains. Similarly, policy and decision-makers working on climate change, biodiversity and environmental conservation have scope to identify partnerships for tourism industry stakeholders to play an active role in promoting the implementation and sustainability of key government-led initiatives, such as the 30 million Tree Planting campaign led by the Ministry of Forestry.⁷

Experiences in embedding sustainability within other similar destinations (culturally, size or types of destinations) have been reviewed as part of the baseline assessment. This included Vanuatu, the Cook Islands, Palau, and Hawaii. Lessons include:

- Engaging visitors in sustainability measures is an important part of their destination experience.
- Telling the sustainability story and demonstrating related measures is increasingly expected.
- Incorporating stewardship, indigenous principles and values aligns with sustainability considerations.
- Pushing high-volume markets comes at a cost, including environmental and social impacts.

Topic 3: The visitor economy

Key Messages and Recommendations:

- Tourism and the visitor economy is a major contributor to economic activity, GDP, taxation, employment, and multiplier effects throughout the economy to other sectors – such as agriculture, fisheries, creative arts, construction and transport.
- Tourism employs a significant proportion of the formal workforce.
- COVID-19 had devastating effects on the industry and therefore the economy, but tourism is recovering stronger than projected and driving the general economic recovery.
- Strengthen partnerships across government agencies and the private sector to improve timeliness, reliability and accessibility of data relating to tourism's value to the visitor economy.
- Strengthen the evidence base for government policy and investment decision-making, including improved modelling of regulatory and fiscal policy reform impacts on the visitor economy and tourism value chains.
- Promote research partnerships particularly relating to tourism value chains, links between formal and informal employment and entrepreneurship and tourism leakage to provide updated information for decision makers.

Tourism contributes significantly to the Fiji economy through employment, economic activity, taxation and as a multiplier for other sectors that benefit from tourism workers' disposable incomes.

Fiji is among the world's 20 most tourism-dependent nations, with the sector contributing nearly 40 percent of GDP and being the largest earner of foreign exchange. It is the largest formal employer in the country with over a third of all workers working in the industry. Around 20% of public sector revenue, which funds schools, hospitals, and infrastructure, comes directly from the tourism industry. This would be much larger when tax revenues from industries that supply the tourism sector are considered.

⁷ <https://www.parliament.gov.fj/wp-content/uploads/2021/03/WR-37-of-2021.pdf>

According to the Fiji Bureau of Statistics (FBoS), earnings from tourism in 2019 hit more than FJD 2 billion excluding flights and more than FJD 3 billion including 50 percent of the flight ticket in tourism earnings.⁸ Prior to the COVID-19 pandemic, annual visitor arrivals grew consistently for nearly 10 years. International arrivals reached 894,000 in 2019, representing a 5.2 percent Compound Annual Growth Rate (CAGR) since 2010 with year-on-year increases in visitor arrivals, tourism earnings and visitor spend. Given the prominence and importance of the industry to the economy, and the links to other support services and products, COVID-19 had a devastating effect on the economy with the impacts felt across almost every industry. Tourism contributed an estimated FJD 500 million⁹ directly to government tax base in 2019 and its collapse impacted all government services.

Tourism is recovering strongly, with better-than-expected visitor arrivals and an 18 percent increase in holiday spend per visitor, per trip in 2022 relative to 2019 pre-pandemic.¹⁰ As Fiji's largest generator of foreign exchange, growth in tourism earnings will continue to be critical to achieving sustained economic progress.

Figure 3. Snapshot - Fiji International Visitor Survey Apr-Dec 2022



Source: MTCA and IFC

8 2019 International Visitor Survey, IFC and MCTTT.

9 Fiji Revenue and Customs Service data and author calculations.

10 April-Dec 2022 International Visitor Survey. <https://mcttt.gov.fj/division/tourism/international-visitor-survey/>



Tourism's direct contribution to the economy is through businesses directly engaged in servicing the tourism industry: hotels, transport, and tour operators. Tourism's wider economic impact results from indirect contributions to other parts of the economy, such as education, retail and manufacturing and the multiplier effect of visitor spend across the economy through those employed in the industry.

As shown in Table 1, between 2017 and 2019, tourism gross value added fell slightly from FJD 1.2 billion to 1.13 billion, largely due to higher intermediate costs, such as fuel.

Table 1. Fiji tourism gross value 2017-2019 (FJD)

	2017	2018	2019
Total Gross Value Added (GVA)	8,930,771	9,363,403	9,636,507
Total Tourism Gross Value Added (TGVA)	1,202,541	1,180,770	1,133,608
Growth rate of TGVA	13.6	-1.8	-4.0
TGVA contribution to GVA	13.5%	12.6%	11.8%

Source: Fiji Bureau of Statistics

In 2019, direct tourism taxes contributed more than FJD 500 million to total tax revenue through departure taxes, sales tax (VAT, ECAL, STT), employee tax and corporate tax. This represented around 18 percent of the government's total tax revenue. This recovered to an estimated FJD 178 million in 2022.

Preliminary data from the 2022 International Visitor Survey¹¹ (IVS) estimates that the spend per visitor increased to FJD 271 per person, per night (April-August), up 12 percent from FJD 242 in 2019 over the same five months.

Tourism is a significant employer. In 2019, it directly employed more than 28,000 people (59 percent male, 41 percent female). In 2019, total formal employment amounted to 180,106 employees, of whom 62,277 employees (34.5 percent of total formal economy workers), were employed directly and indirectly in the tourism sector.¹² The tourism sector also generates employment in the informal sector including agriculture, fisheries, and handicraft production. Limited information is available on tourism's contribution to informal employment.

Since reopening, the tourism industry has faced challenges with a significant number of tourism employees moving overseas to take up opportunities in the hospitality sector in Australia, New Zealand, and the United States, in particular. Increases in the numbers of Fijians on regional employment schemes have also affected labour availability. In 2022, close to 22,000 people left Fiji for work, 5,000 migrated permanently and more than 16,000 left on work permits.¹³

Significant improvements to data sources and availability have been made over the last decade to support decision-makers in developing policy to support continued sector growth. Ongoing challenges remain in consolidating robust, reliable, timely data and information to support decision-makers in the public and private sector. Estimating tourism's impact on the economy is also hampered by a lack of recent data on tourism value chains and leakage to ascertain the degree to which the industry is sourcing inputs locally rather than depending on imports.

Strengthening partnerships across government agencies, academia, and the private sector to improve timeliness, reliability and accessibility of data relating to the value of tourism to the visitor economy would strengthen the evidence base for government policy and investment decision-making.

¹¹ Ibid.

¹² FBoS Direct Contribution of Tourism 2021 release.

¹³ Ministry of Finance Permanent Secretary speech at the National Economic Summit 2023 <https://www.fbcnews.com.fj/news/over-22000-people-leave-fiji/>.

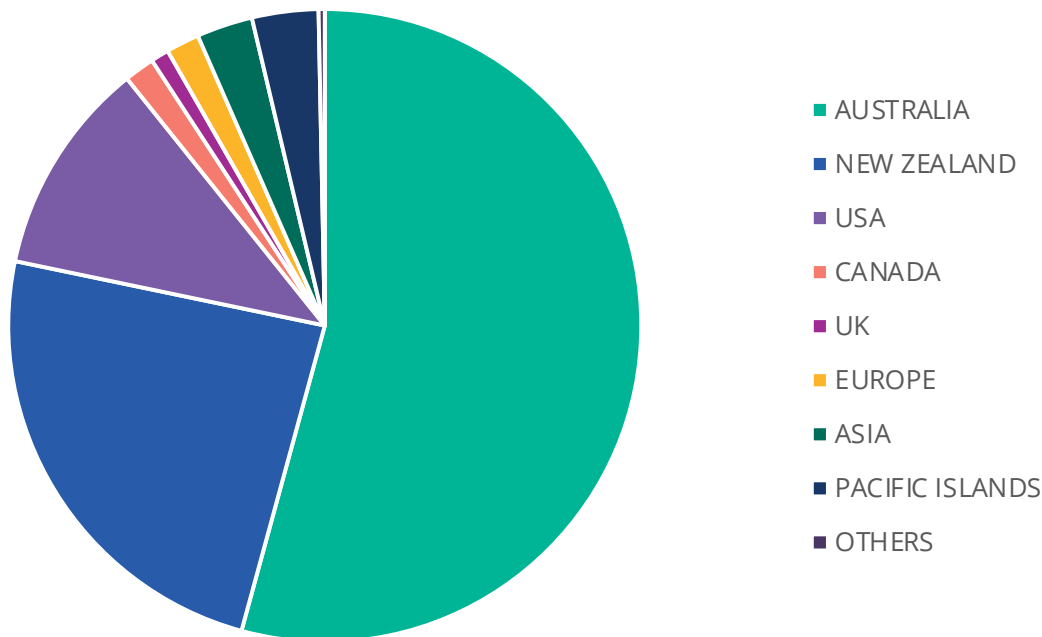
Topic 4: Market segmentation

Key Messages and Recommendations:

- Fiji continues to rely on its traditional source markets of Australia and New Zealand for the bulk of arrivals.
- In general, higher value properties are higher yielding per visitor. Luxury holidays are expected to grow in popularity.
- Wellness and self-care are also becoming increasingly important reasons for travel.
- Sustainability is increasingly important for guests with more than 90 percent of consumers looking for sustainable options when travelling and more than half of guests reporting a willingness to pay more for a sustainable experience.
- There are three key market segments of travellers to Fiji segments: the active adventurer, cultural traveller, and tourist.

Fiji continues to rely on its traditional source markets of Australia, New Zealand, as well as the United States visitors for the bulk of guest arrivals. In 2022, 54 percent of visitor arrivals were from Australia, 24 percent from New Zealand and 11 percent from the United States.

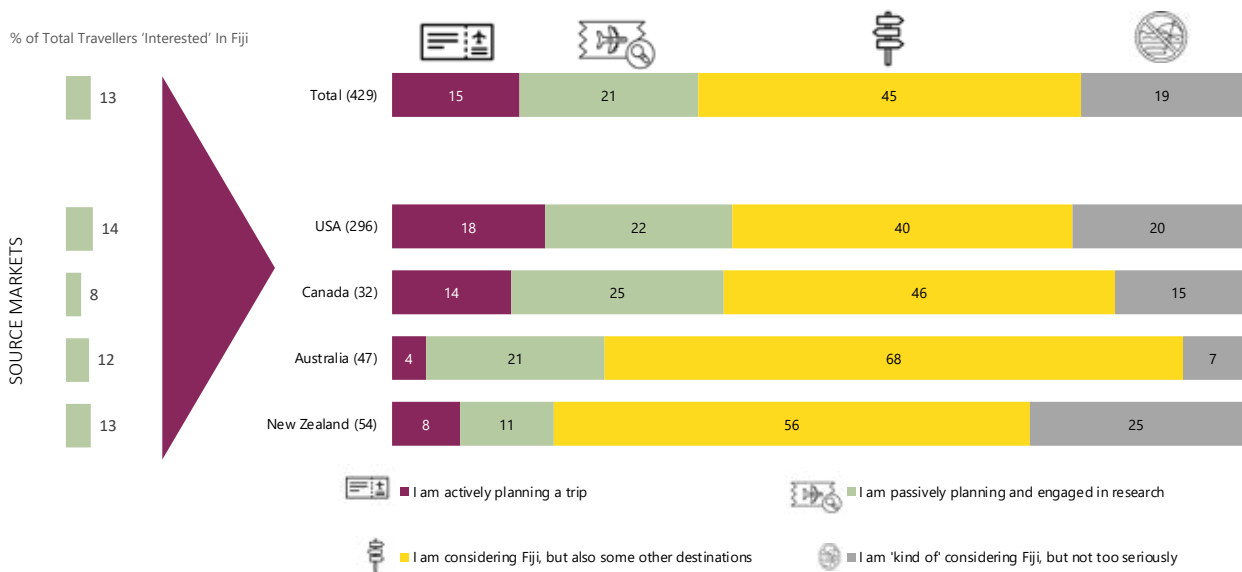
Figure 4. Source markets for Fiji tourism sector in 2022



Source: Fiji Bureau of Statistics

Market analysis¹⁴ in these three source markets (Australia, New Zealand, and the United States), in late 2022 indicated that perceptions and impressions of Fiji are generally positive. For the 2022 benchmark study, Fiji was compared to Cook Islands, Barbados, Indonesia, Thailand, Maldives, Hawaii, Mexico, and Tahiti. Travellers are generally more familiar with Hawaii and Thailand than Fiji, but it performs well against other Pacific regional competitors. Just under half of surveyed travellers would be likely to recommend Fiji, making it second to only Hawaii in terms of likelihood of recommendation. When asked “(If you’re) thinking about a possible holiday/vacation to Fiji, which of the following best describes how far along you are in planning or booking that trip?”, American travellers were further along the path to purchase (refer Figure 5).

Figure 5. Analysis of Fiji tourism source markets (2022 Q4)



Source: Twenty31 for the Tourism Statistics Taskforce

In assessing performance according to brand attributes, 39 attributes across 19 themes were grouped in three areas: tourism assets and experiences, tourism infrastructure and enabling environment, emotional connections to Fiji (refer Figure 6).

Fiji has considerable strengths in beaches, outdoor activities, and natural scenery. It is also viewed as a friendly, vibrant, and varied destination. Fiji also performs strongly on resorts and being somewhere travellers have always wanted to visit. Fiji’s enabling environment is by far the weakest category of attributes.

Prospective guests’ likelihood to visit is driven by having things to do, environmentally friendly options, all-inclusive options, and a vibrant atmosphere. Weaker performers are convenience, affordability, sports, and internet connectivity.

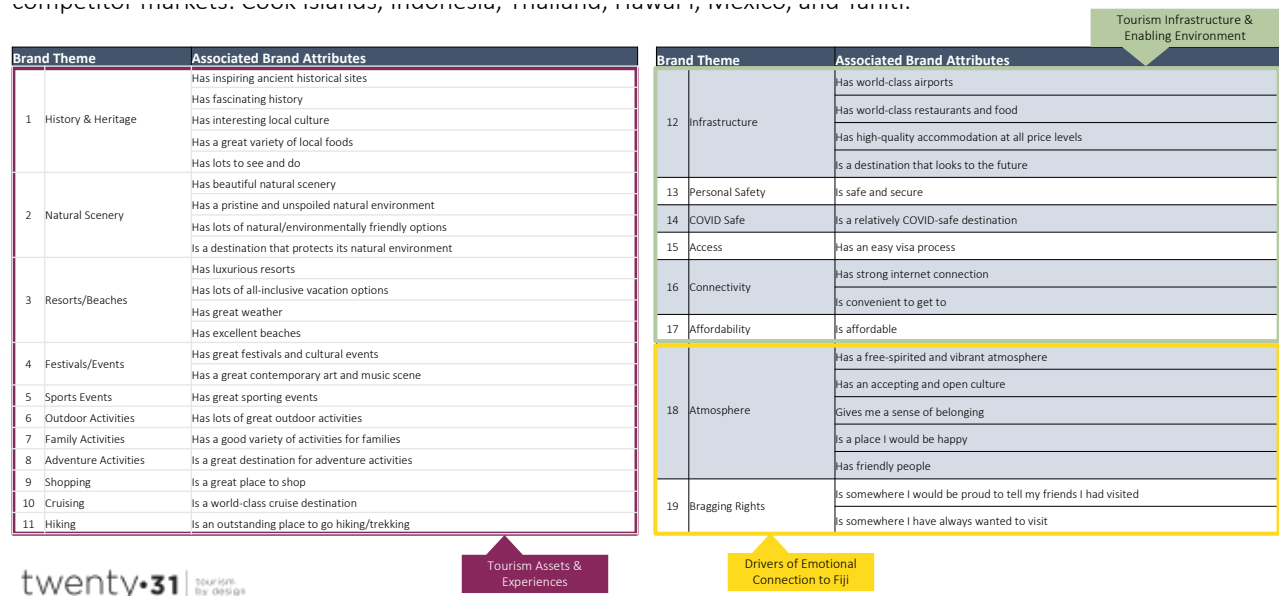
For Australians, visitation is most strongly driven by Fiji’s natural environment. This is coupled with some associated attributes around it being a ‘dream destination’ and having a variety of accommodation options. Weaker attributes are art/music scene and being an immersive destination.

Fiji has many qualities it is associated with, but some such as a ‘pristine environment’ or ‘family activities’ are viewed as a much stronger part of the Fiji brand than ‘affordability’ or ‘convenience’.

14 Conducted by consultancy firm Twenty31 for the Tourism Statistics Taskforce

Figure 6. Fiji brand attributes – analysis of tourism source markets (2022 Q4)

competitor markets: Cook Islands, Indonesia, Maldives, Hawaii, Mexico, and Tahiti.



Source: Twenty31 for the Tourism Statistics Taskforce

There are three key market segments of travellers to Fiji: the active adventurer, cultural traveller, and tourist.

- The active adventurer generally skews towards higher income, education, and childless homes. They favour hotel stays, medium-length trips and are primarily deterred by safety and expense concerns.
- Cultural travellers are relatively high-income and education and skew towards childless homes. The cultural traveller prefers diverse immersive activities but expect value for money, thus can also be deterred by expense. The culture segment is attracted by learning about new cultures.
- The tourist is generally highly educated, prefers hotel stays, and is deterred by distance and lack of social contact. Tourists skew towards early middle age.

In general, higher value properties are higher yielding per visitor. There are opportunities to target higher value visitors and Tourism Fiji is actively promoting luxury accommodation options as part of its marketing strategy. Luxury holidays are expected to grow in popularity globally, with annual revenue from luxury hotel sales expected to reach US\$92 billion by 2025 (compared to US\$76 billion in 2019).¹⁵

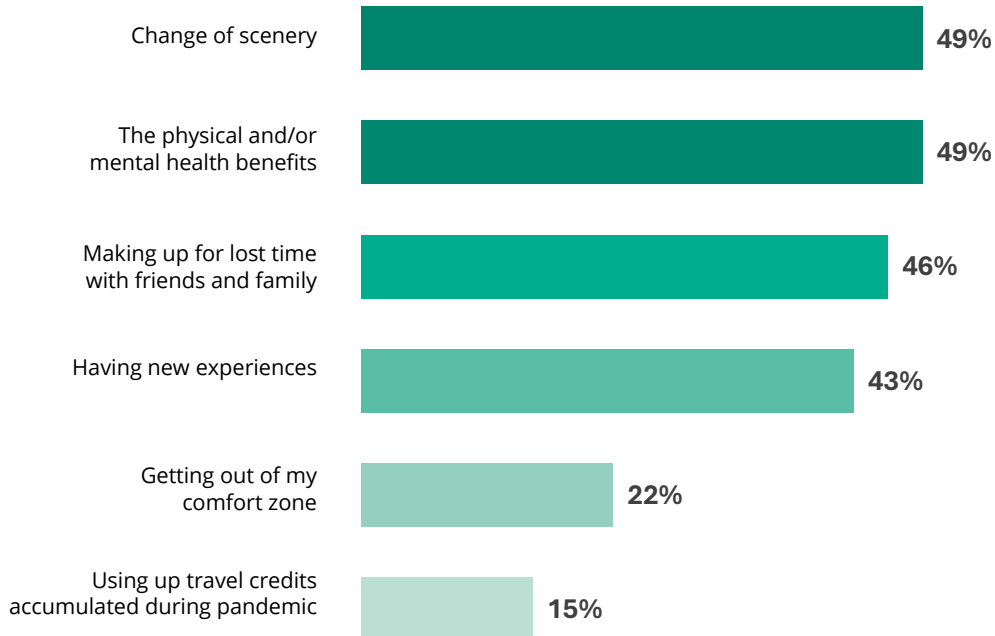
Wellness and self-care are becoming increasingly important as reasons for travel with 49 percent of surveyed consumers¹⁶ indicating that the physical and mental health benefits of travel have become more important in their travel decisions.

15 World Travel and Tourism Council et al, (2023) A world in motion: shifting consumer travel trends in 2022 and beyond. <https://wttc.org/consumer-trends>. 2019-2022 comparison in current prices.

16 Expedia. <https://advertising.expedia.com/blog/travel-trends/travel-more-important-now/>

Figure 7. Factors that drive consumer travel decisions

Since the start of the pandemic, which if the following have become more important when consumers make travel decisions?



Source: Expedia Group Traveller Value Index 2023

Sustainability is increasingly important for guests with more than 90 percent of consumers looking for sustainable options when travelling and more than half of guests stating they would pay more for a sustainable experience.¹⁷ Another study¹⁸ by the World Travel & Tourism Council (WTTTC) and Trip.com Group, together with Deloitte, revealed a heightened appetite for sustainable tourism amongst consumers, with 69 percent of travellers actively seeking sustainable travel options. In a survey, nearly 60 percent of travellers said they were either already paying to offset their carbon emissions or considering it if the price was right.¹⁹

17 Expedia Group, Sustainable Travel Study, 2022. <https://go2.advertising.expedia.com/sustainability-study-2022>

18 World Travel and Tourism Council and Trip.com, "Trending in Travel - Emerging Consumer Trends in Travel & Tourism in 2021 and Beyond."

19 Deloitte Consulting B. V, "2023 Travel Industry Outlook."

Topic 5: Asset and experience inventory

Key Messages and Recommendations:

- There are more than 400 licensed accommodation providers in Fiji, and a growing number of unlicensed short-term rental operators on platforms such as Airbnb.
- Inventory and activities are concentrated in the Coral Coast-Nadi-Denarau area.
- Different sized properties tend to have diverse characteristics and therefore diverse capital, workforce, supplier, and investment needs.
- Fiji Hotel and Tourism Association members include all larger operators and represent a large 'voice of the industry'. Many smaller operators are not members and may not have their voices heard in crucial policy discussions.
- Most tourism experiences offered are ocean-based, including sailing and snorkelling trips. Special interest travellers include scuba divers, surfers and yachting and represent recognised high-end niche segments.
- There is an increasing demand for nature-based, adventure, cultural and immersive experiences.
- There is potential to develop a high-end yachting niche segment, with growth in small yacht and superyacht arrivals supporting dispersal of tourism benefits across Fiji.

There are more than 400 licensed accommodation providers in Fiji, but this figure underestimates the total number of accommodation providers. There are more than 500 Airbnb listings for example.

Fiji's hotel inventory is concentrated in the Coral Coast-Nadi-Denarau area accounting for around 75 percent of the room inventory. Denarau hotels hold more than 14 percent²⁰ of Fiji's room inventory and include four out of five top largest resorts. A further 16 percent is in Suva catering largely to meetings, incentives, conferences, exhibitions (MICE), and business travellers.

- Four large internationally managed hotels hold around 10 percent of room inventory.
- 10 hotels hold up to 20 percent of Fiji's room inventory.
- 15 hotels hold 30 percent of Fiji's room inventory.
- 25 hotels hold 40 percent of Fiji's room inventory.

Hotels can be grouped by number of rooms, management structure, foreign versus domestic ownership and those that are owner operated.

Less than 30 rooms: tend to be owner operated, individual owners, mixed foreign-domestic ownership.

30-100 rooms: have professional management structure with non-owner general manager and management, mixed foreign-domestic ownership, investment groups or investment structures.

More than 100 rooms: management companies (IHG/Marriott/Accor), investment groups or institutional investment organisations.

These three distinct types of tourism properties have different needs, wants and desired outcomes. This is relevant in terms of attracting investments across all three property types.

With the 25 biggest hotels accounting for 40 percent of Fiji's room inventory along the Nadi-Coral Coast belt, these big hotels have a large share of the 'voice of the industry' through the FHTA.

²⁰ Analysis and percentages in this section are derived from authors' analysis of multiple data sources, some confidential.



Table 2. Accommodation from FHTA's copy of Hotel Licensing Board Listings 2021-2022

Region	Sum-Rooms	Sum-Dorms	Sum-Beds	Sum-Persons	Properties Open
Levuka	109	1	193	291	13
Taveuni	325	0	498	753	40
Savusavu	137	0	214	397	37
Labasa	222	0	344	470	13
Sigatoka	2,119	13	4,497	7,163	57
Nadi	5,174	3	9,347	15,520	73
Lautoka	2,008	48	5,165	6,692	73
Ra	255	2	498	748	16
Suva	2,035	8	3,819	4,578	74
Kadavu	146	0	233	294	9
Totals	12,530	75	24,808	36,906	405

Source: FHTA

Most experiences and tours are located around the large concentration of tourists along the Nadi-Coral Coast belt. Most tourism experiences offered are ocean-based, including sailing and snorkelling trips. Top rated²¹ and notable tourism experience providers, excluding scuba diving, golf, and surfing, include Cloud 9, Seventh Heaven, Sabre, South Sea Cruises, Malamala Beach Club, Zip Fiji, EcoTrax, Sigatoka River Safari, Rivers Fiji, Dolphin Watch Fiji, Garden of the Sleeping Giant and Talanoa Treks.

Special interest travellers include scuba divers, surfers and represent recognised high-end niche segments.²² There are 60 PADI/SSI registered scuba dive operators and training facilities throughout Fiji.²³ There are more than 20 specialist surf resorts/operators, all of whom are SMEs and locally owned apart from Tavera.

Another area with potential to develop into a high-end niche segment for Fiji is yachting. Although a seasonal market, the growth in small yacht and superyacht arrivals will further increase opportunities for investment and development of the segment.²⁴ It also assists in spreading the benefits of tourism to non-traditional tourism regions.²⁵ Similarly, expedition cruise ships offer opportunities for tourism dispersal to less visited regions, without the environmental impact of larger cruise ships.²⁶

21 <https://www.tripadvisor.com/>

22 MCTTT, "Fijian Tourism 2021."

23 <https://travel.padi.com/s/dive-resorts/fiji/>

24 Market Development Facility. 2018. 'Economic Impact of International Yachting in Fiji'.

25 MCTTT, "Fijian Tourism 2021."

26 Highlighted in PPD 12 "Cruise Ship Market"

Topic 6: Sustainable Tourism Standards

Key Messages and Recommendations:

- In the absence of common language or industry standards, greenwashing will become an issue.
- The introduction of standards at destination and industry level, such as the recently GSTC-recognized Pacific Sustainable Tourism Destination Standard, will necessitate greater coordination across government and industry to embed sustainability across all aspects of tourism planning, development and management.
- Major hotel groups are likely to have internal programmes and/or external certification requirements.
- In some regional examples, national standards have been developed specifically for the national context whilst others have adopted existing standards and certification programmes recognised by agencies such as the Global Sustainable Tourism Council (GSTC).
- Adapting the SPTO-developed Pacific Sustainable Tourism Standards to the Fiji context would provide a cost-effective option for destination and operator benchmarking, sustainability commitments and ongoing tracking.
- A key consideration is ensuring that the development and adoption of standards recognises existing programmes used by industry and does not impose excessive costs on smaller operators unable or unwilling to pay for formal certification and auditing.

The private sector is increasingly aware of the importance of sustainability measures for its guests and many tourism businesses are working to strengthen policies and actions in this area. TF and FHTA regularly showcase private sector actions to highlight sustainability initiatives and accelerator programmes. Private sector financing underpins opportunities to accelerate progress towards the Sustainable Development Goals (SDGs).

In the absence of common language or industry standards, greenwashing will become an issue that requires active monitoring.²⁷ Anticipating this, the Fiji Competition and Consumer Commission is currently undertaking a study on greenwashing, while TF recently joined the GSTC and has appointed a sustainability officer to its team to help businesses understand and align with sector sustainability goals. The introduction of standards at destination and industry level, such as the recently GSTC-recognized Pacific Sustainable Tourism Destination Standard, will necessitate greater coordination across government and industry to embed sustainability across all aspects of tourism planning, development and management.

²⁷ <https://www.pln.com.au/single-post/greenwashing-you-re-going-to-need-more-than-soap-and-water>



Global certification and benchmarking systems are integral to this, with major hotel groups that have an established footprint in Fiji, like the Marriott Group, requiring that all hotels be independently certified by a 'recognised' certification standard by 2030 (Marriott 360). The IHG Hotels and Resorts group, that historically have opted out of external certification programmes, is also undertaking a sustainability 'transformation' launching an internal sustainability programme called 'Journey to Tomorrow' in 2021²⁸ focusing on five internal ambitions (human resources, communities, carbon and energy, waste and water).

A key contributor to success, or perhaps a reflection of the national commitment to sustainability and therefore its realisation, in similar destinations is the adoption of sustainability standards for operators and destinations. In some cases, national standards were developed specifically for the national context (e.g. Vanuatu, Cook Islands, Solomon Islands and Samoa minimum standards), whilst others have adopted standards and certification programmes recognised by agencies such as the Global Sustainable Tourism Council (GSTC). Costa Rica is often seen as a world leader in sustainable tourism and developed its own national standard recognised by the GSTC. There are numerous standards appropriate to the Fijian context, including the Pacific Sustainable Tourism Standards for Destinations (recognised by GSTC in June 2023) and for Industry. Adapting these regional standards to the Fiji context would provide a cost-effective option for destination and operator benchmarking, sustainability commitments and ongoing tracking.

A concern expressed by smaller operators²⁹ is that the introduction of formal standards, whilst welcomed, could negatively impact small and medium operators that typically do not have the resources for independent auditing and certification and add to the existing regulatory burden.

Experience from other countries, including Vanuatu, suggests that the introduction of minimum standards that incorporate sustainability considerations could act to both streamline regulatory requirements for SMEs and promote sustainable practices and reporting.

The MTCA launched a national Code of Conduct for Tourism Service Providers³⁰ in March 2023 and is working with IFC to develop industry standards for sector-wide adoption. Experiences from the roll out of the Care Fiji Commitment - COVID-19 mitigation industry standards that were implemented across the sector during the pandemic - is helping inform this process.

28 <https://www.businesstraveller.com/business-travel/2021/02/16/ihg-hotels-and-resorts-launches-sustainability-programme/>

29 Duavata Sustainable Tourism Collective Budget Submission 2020.

30 <https://mcttt.gov.fj/wp-content/uploads/2023/03/Code-of-Conduct-Final.pdf>

Topic 7: Financing and investment

Key Messages and Recommendations:

- Supporting tourism that is more sustainable, inclusive, and that encourages dispersal of benefits, requires targeted investment promotion strategies that include non-traditional types of tourism investment. It will also require public investment in tourism-related infrastructure to support such investment.
- There is increasing localisation of tourism investments, in part due to institutional investors such as the Fiji National Provident Fund (FNPF).
- Rising interest from land owning units (LOUs) in equity and joint ventures as part of tourism investments is evident. Currently, few tourism investments are joint ventures or LOU owned.
- High-value tourists³¹ have been identified as a priority for tourism investment, with dispersal to outer islands. Targeting high-value markets would enhance tourism's economic impacts, while minimising adverse environmental and social consequences.
- There is a need to increase the experiential product development activity in Fiji.
- Developing alternative markets and experiences would assist visitor dispersal outside the 'tourism belt'. This could include marinas and yachting, targeted remote working properties, and short-term rentals (Airbnb) and apartments.
- Making it easier to do business and gain tourism approvals is a critical part of diversifying the tourism landscape and encouraging dispersal.
- There is a well-recognised financing gap faced by micro, small and medium enterprises.
- Community-based and community-owned tourism could benefit from services provided by private sector business development service providers, mentors, and coaches, to help them balance business discipline and social and cultural obligations.
- Streamlining the processes for leasing mataqali³² land to members of the mataqali/ and LOUs for tourism purposes would also support growth in this segment.

Attracting financing and investors to support sustainable tourism requires a coordinated and intentional investment promotion strategy that seeks to attract investors that also share these values and are positioned to attract consumers that do. It is difficult to attract investors that are seeking to 'sell' Fiji as a sustainable destination whilst simultaneously encouraging large scale developments that may result in significant environmental damage. As the tourism industry grows the additional room inventory required to support anticipated growth, investment must be aligned to the environmental, social, and cultural policy aims of the government. Reflecting these broader policy objectives within the investment promotion strategy and relevant tax incentives is critical to attracting the desired investment.

Supporting tourism dispersal will also require investment in roads, airports, wharves, jetties, energy, water, and communications connectivity to reduce the capital investment required by investors and make investments in more remote areas of the country viable.

31 World Bank Group, "The Future of Pacific Tourism"; Asian Development Bank, "COVID-19 and the Future of Tourism in Asia and the Pacific"

32 Refers to native owners or other division or subdivision of the natives having the customary right to occupy and use any native land "iTaukei Land Trust Act 1940"



Tourism is concentrated in the Coral Coast-Nadi-Denarau-Mamanuca-Yasawas corridor that will continue to attract investors as foundational tourism infrastructure (airports, roads, transport, ports) is already in place to lower the costs of construction and support access to a ready-made tourism market for experience development. Investment Fiji estimates around FJD 320 million in pipeline tourism investments cannot be realised due to high infrastructure costs that would be borne by the developer.

There is increasing localisation of tourism investment, in part due to institutional investors such as the Fiji National Provident Fund (FNPF). Of the 25 hotels with a room inventory exceeding 100, 15 have some level of local ownership.

Between 2007-2021, 601 tourism projects were registered with Investment Fiji, with proposed investment of FJD 1.6 billion. Fewer (262) projects were realised over this period, but the level of actual investment (FJD 1.6 billion or FJD 120 million on average annually) still matched that proposed from registered projects. These 262 projects created more than 3,000 jobs.

As these figures only include foreign direct investment, domestic investment would need to be added to paint a more realistic picture of trends in tourism investment over time. The TLTB currently administers 281 tourism leases and licences, of which 258 are active leases. A total of six lease application cases are currently in process. Most tourism leases are within the West of Viti Levu and offshore islands. Only 15 leases are on Vanua Levu.

There is increasing interest from land owning units (LOUs) in equity and joint ventures as part of tourism investments. Some LOUs are completing their own valuations to be in stronger negotiating positions as part of lease agreements. Currently, few tourism investments are joint ventures or LOU owned.³³

High-value tourists³⁴ have been identified as a priority for tourism investment. This market has already been successfully developed in Fiji, with dispersal to outer islands where tourists have a higher spend per person and longer length of stay than the Viti Levu resort style tourism.³⁵

Six Senses³⁶ in Mamanucas and Kokomo in Kadavu are good examples of high-end ecotourism that maximise returns to the country, while including social and environmental bottom lines in their operations. Smaller examples include Remote Resort, Nukubati, Sau Bay, Paradise Taveuni and niche accommodation providers, such as Matanivusi and Tavarua.

There is a need to increase the experiential product development activity in Fiji. Given the small size and varying levels of knowledge of many tourism operators, and the regulatory challenges associated with developing experiential tourism products³⁷, public sector/government, development partners and private sector/larger industry participants have an important role to play in supporting SMEs to understand the market opportunities available.

To achieve the aims of tourism dispersal³⁸ and spread tourism outside the 'tourism belt', there is also a need to develop alternative markets and experiences. This could include marinas and yachting, targeted remote working properties, short-term rentals (Airbnb) and the apartment market.

33 Nakelo Treasure Island Resort has been converted to 100 percent LOU ownership. Shangri-La is partly owned by the LOU.

34 World Bank Group, "The Future of Pacific Tourism"; Asian Development Bank, "COVID-19 and the Future of Tourism in Asia and the Pacific."

35 MITT, IFC, and Fiji Bureau of Statistics, "International Visitor Survey 2019 IVS."

36 Komo Six Senses Fiji Wins Climate Action Award – TravelPulse.

37 Duavata Collective Budget Submission 2020.

38 Fijian Tourism 2021, Tourism Fiji Corporate Plan 2022-2024.

High tax rates have reportedly constrained the profitability of tourism businesses. Prior to the COVID-19 pandemic, tourism-oriented businesses were required to pay an Environment and Climate Adaptation Levy (ECAL) of 10 percent on prescribed services, if their annual turnover exceeded FJD 1.25 million. ECAL was additional to a 9 percent VAT and a 6 percent service turnover tax. The resultant combined tax rate reduced industry profit margins and constrained both investment and reinvestment in the sector. This led to some resorts becoming run down, and operators competing on price for package tourists. In July 2020, as part of the Government of Fiji's pandemic-related economic and fiscal stimulus, the combined tax rate was reduced to 14 percent and later consolidated to a single VAT rate of 15 percent in 2022.

Starting a business in Fiji can be challenging³⁹ and securing approvals for new projects is a bureaucratic and burdensome process. New hotel operations, for example, require multiple licences from different regulatory bodies, which can take up to several years to be approved. This is a deterrent for local and foreign investors and constrains new developments and entrepreneurship. Recent reforms, including an online portal (bizFiji) with information on starting a business and obtaining a construction permit⁴⁰, online company and/or business name registration, online tax number registration and the removal of business licences aim to ease the regulatory burden on new businesses. Various stakeholders have highlighted the delays in the completion and approval of environmental impact assessments as a significant constraint to realising investments. An Investment Facilitation Committee, an inter-ministerial body under the MTCSC, has been established to support the streamlining of investment-related processes.

For larger companies with a financing track record, obtaining finance from a commercial bank is likely to be relatively straightforward. Smaller entities, however, struggle to obtain finance to scale. Hence, their expansion is often reliant on internal sources of funds. The more entrepreneurial may seek funds from non-internal sources, but expansion often becomes constrained by previous adverse experiences.⁴¹

There is a well-recognised gap in financing available for micro, small and medium enterprises. As they typically have limited track records, and little or no "acceptable" collateral or equity contributions to make towards the loan, they have considerable difficulty in obtaining finance from the formal financial sector. An important implication for the NSTF is that smaller companies with potential to scale or replicate current operations in another location due to their lower environmental footprint, may find it difficult to access finance.

Community-based and community-owned tourism is a specific segment that has been a target for development and investment historically with mixed results. Indigenous tourism is a growing market segment worldwide and supporting iTaukei communities to be involved in the tourism sector is a key priority. Lessons from previous experiences, which have included provision of grants for infrastructure development, suggest a need to improve the information available to communities on options for business models (trusts, companies limited by guarantee, limited liability companies, cooperatives). Nurturing the growth of tourism enterprises through exposure and connections to private sector business development service providers that understand the context of balancing business discipline and social and cultural obligations is also likely to be a more effective way than relying on civil servants with no private sector experience to play this role. Critical to supporting iTaukei-owned businesses is also streamlining the processes for leasing mataqali land to members of the mataqali/LOUs.

39 ADB 2013.

40 <https://www.bizfiji.com/>.

41 Sharma and Gounder, 2012.

Topic 8: Workforce and skills assessments

Key Messages and Recommendations:

- The pipeline of staff, upskilling and new methods of staff retention are needed within the tourism and hospitality industry.
- The focus on future training must reorientate towards hospitality training and upskilling, rather than academic tourism studies.
- Most hospitality jobs require trade certification which should be more attractive in terms of status/cost/scholarships.
- In-house training programmes are to be encouraged, supported and promoted.
- While there is an increasing number of business incubation and acceleration programmes, they only reach a small number of businesses.
- The Ministry of Tourism and Civil Aviation should consider providing outsourced business advisory services to private sector providers.

Multiple tourism stakeholders have been vocal about the large number of tourism workers leaving for Australia and New Zealand. Industry stakeholders comment that although programmes like the Pacific Australia Labour Mobility Scheme generate good remittances for Fiji, they have also created a vacuum in the tourism industry. In response, regular on-the-job training and ongoing recruitment is required. The greater the time, effort and money going into training, the lower the spend on things that are core, causing a drop in service level. Trying to manage tourists' expectations during peak periods in the industry is challenging given the lack of skilled hotel workers.

To be truly resilient and sustainable, the pipeline of staff, upskilling and new methods of staff retention are needed within all sectors of the tourism and hospitality industry. Key industry players are examining employee retention strategies. IHG recently announced that all staff would be offered health insurance, life insurance, parental and birthday leave and a greater focus on professional development. The Marriott Group has expanded its training academy to improve its employment pipeline.

The focus of future training must reorientate towards hospitality training and upskilling as a trade, rather than academic tourism studies. There is a need to educate the industry on this difference, as it is not well understood by policymakers, educational institutions, and the private sector.

Growing the number of trained hospitality workers and opportunities requires trade certifications that are more accessible. There is a need to make vocational certification more attractive in terms of status, cost and scholarships. Further analysis is required to understand whether government intervention via cheaper or subsidised courses to stimulate demand would address the skills gaps or whether there are other barriers, in addition to costs, that are not generating the pipeline of hospitality workers required by the industry.

In-house training programmes are to be encouraged, supported, and promoted:

- Apprenticeships in hospitality trades are just as important as in-class work
- Corporate hotel management programmes, such as Marriot Academy and IHG® Academy

Non-hotel hospitality training is currently very limited. Tour guides, transfers, travel agency and booking agent training only happens 'on the job' with no formal training institutions nor courses available for upskilling and improving service in these sectors. This is particularly relevant for community-based operators who currently rely on ad hoc advice from the public sector, friends, family, and partners in the value chain, not all of whom are suited to providing business advisory services.

Similarly, tourism entrepreneurship is not well supported or encouraged. As one of the fastest growing sectors of the economy there is a need for a more coherent strategy to support tourism entrepreneurs. A closer collaboration is needed between MTCA, Investment Fiji and MSME Fiji alongside supportive partners such as Business Assistance Fiji, the Fiji Employers and Commerce Federation, GGGI, ygap and others.

Since the COVID-19 pandemic there has been a mushrooming of business incubation and acceleration programmes, but these are currently reaching only a small number of businesses. There is a growing pool of Fijian business advisers and networks available to businesses in urban centres but tourism expertise among these adviser networks is relatively limited. The MTCA should work with existing business advisory groups and networks to increase the understanding of tourism opportunities and should consider outsourcing business advisory services to private sector providers given MTCA 's own capacity constraints.

A training levy is paid by all tourism operators but is mainly utilised by large hotels with full-time in-house training departments that can manage the paperwork involved. Its effectiveness has also been reduced by diverting funds to the Accident Compensation Commission Fiji fund and Medical Scheme Levy.

Figure 8. How does the FNU Levy work?



Source: Fiji National University

Topic 9: Environmental, social and cultural sustainability

Key Messages and Recommendations:

- Tourism depends on the pillars of sustainability (environmental, social, cultural, economic) to grow. A healthy environment, workforce, strong cultural identity and community partnerships all play critical roles in supporting tourism industry growth.
- Various threats to these assets, including from the industry itself, may weaken this underpinning foundation. Tourism developments, when poorly planned and executed, undermine its environmental asset base.
- Hospitality is hard work with long hours. Staff with children are reliant on unpaid care work from other family members, which has implications for the family structure.
- Historically, the sector has not always reinforced cultural heritage conservation, and the promotion of overseas manufactured goods or performances continues to be problematic.
- Strengthening partnerships between industry and groups of artists, performers, poets, and storytellers would support a more authentic representation of Fiji's diverse culture.
- Several conservation organisations have active partnerships with tourism operators. Working to promote and strengthen these partnerships can support both conservation and sustainability efforts within the tourism sector.
- Integrating sustainability principles and existing climate, environmental and biodiversity commitments into NSTF, investment promotion, planning guidelines and licensing is key to creating an enabling environment for the shift required in the tourism industry's trajectory.
- The scale of transition to a green, low-emission and climate-resilient economy is a huge structural adjustment. Devising appropriate mechanisms to leverage private investment is critical. Investment and financing for sustainable tourism development does not necessarily require the creation of new instruments, but rather better connecting tourism projects with available green and other financing instruments.

Tourism depends on the pillars of sustainability (environmental, social, cultural, economic) to grow. A healthy environment, workforce, a strong cultural identity, and community partnerships all play a critical role in supporting the tourism industry's growth. All tourism-related activities could - and should - aim to be sustainable. This is distinct from ecotourism, which is a tourism sub-sector specifically focused on travel activities that contribute to environmental protection and social development.

Sustainable tourism planning and development requires the involvement of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building.

Fiji has already made numerous policy commitments – to ocean conservation, biodiversity conservation, renewable energy, climate action – that have implications for the tourism sector and its future development. These must be built into the NSTF priorities. Fiji is marketed to the world based on these environmental, social and cultural assets. TF's new brand 'Where happiness finds you naturally' reflects this.

Various threats to these assets, including from the industry itself, may weaken this underpinning foundation. Tourism developments, when poorly planned and executed, undermine its environmental asset base. The Environmental Management Act (2005) requires all hotel developers to conduct an Environmental Impact Assessment (EIA), but this is often framed in terms of identifying and minimising any potential negative impacts rather than holistically considering sustainability.

How social impacts are assessed or weighted compared to environmental impacts is opaque. Other threats include political instability, climate and disaster risks, poor agricultural practices, forest degradation⁴², coastal erosion, reliance on unpaid care work⁴³, poor working conditions for staff, urban-rural drift including staff movements to seek employment opportunities and eroding traditional cultures.⁴⁴

Tourism is also a major user of energy, water, and a creator of waste. In 2020, commercial energy use fell by 12 percent, water use by 8 percent and waste by 4 percent with the assumption these reductions largely reflect decreasing tourism consumption because of the COVID-19 pandemic. Further analysis is required to better understand tourism's water use, carbon footprint, and waste production and opportunities to reduce it to sustainable levels.

Fiji has a national commitment to reduce carbon emissions by 30 percent by 2030 (NDP 2017), through decarbonisation pathways across all major sectors, including electricity and energy use and transport (LEDS 2014). Tourism is identified in various national strategies (NDP 2017, LEDS 2018, GCF 2014, NCCP) as a critical sector contributing to national emissions reductions.

Measures to reduce tourism's overall energy and carbon footprint, identified in various development plans, include:

- Expansion of solar energy
- Institutionalising an air-conditioner policy, including minimum temperatures depending on use of space
- Smart aircon sensors in all rooms
- Recycling bins to collect separated waste
- Reduce waste to landfill through composting and recycling
- Developing charging stations and electric vehicle facilities
- Developing solar powered boat engines

Pre-pandemic, the sector provided direct employment for more than 28,000 Fijians in tourism.⁴⁵ However, jobs in tourism can require staff to relocate and spend time away from their families. Hospitality is hard work with long hours. Staff with children are reliant on unpaid care work from other family members, which has implications for family structure. It is not uncommon for grandparents to bring up children in rural areas whilst parents work away in tourism hot spots.

Historically, the sector has not reinforced cultural heritage conservation, and the prevalence of overseas manufactured goods continues to be problematic. It is not uncommon that handicrafts offered for sale at resorts are sourced by rural women in stores and then sold on to guests. Village visits are an important part of visiting Fiji and a way for visitors to connect to iTaukei culture and for rural communities to earn income from the sector, but they risk becoming formulaic and insincere. Performances at hotels often portray other Pacific Island Countries' dances as Fijian — compromising the overall experience and Fijian brand. Addressing these challenges necessitates a holistic approach including a closer collaboration between the Ministry of iTaukei Affairs, Culture, Heritage and Arts (MTCHA) and MTCA to develop and promote authentic cultural experiences and products. Partnerships between the tourism industry and industry associations and groups of artists, performers, poets and storytellers could support a more authentic representation of Fijian culture, including recognition of the increasingly modern lived Fijian culture alongside traditional cultural performances and crafts.

42 NatureFiji-MareqetiViti input to NSTF dialogue sessions.

43 Fiji Country Gender Assessment, 2023.

44 Movono et al. 2018.

45 FBoS.



With the pandemic-enforced pause in travel, an increasing number of voices within the tourism industry, conservation organisations, academia and governments questioned whether the travel industry could rise to the challenge of improving tourism practices and incorporate the principles of sustainable tourism as the new normal.

In the Pacific, the pandemic has also led to an increase in tourism research examining the multifaceted nature of Pacific well-being, with a view to providing lessons for tourism planning for more just, sustainable tourism in the future.⁴⁶ The SPTO-led Pacific Sustainable Tourism Policy Framework 2021 highlights a desire to ensure that tourism better reflects the cultural and environmental stewardship values of the Pacific within the tourism sector.

Sustainability is also a growing area of concern for travellers. Based on recent global market research, visitors want to choose more sustainable travel options and are willing to pay for it. Young travellers are the main drivers for a shift in the tourism industry, seeking “cool” recognition and bragging rights for sustainable travel. However, mass global tourism has yet to craft a new and more sustainable offer and value proposition as quickly, in response to travellers shifting their mindsets and behaviours.⁴⁷

The private sector is increasingly active in the sustainability space as reflected by ‘Sustainability’ being one of the core strategic pillars of the FHTA in 2023, which represents all large accommodation providers.

Multinational hotel companies are under increasing pressure to prepare for climate- and nature-related risk reporting requirements. Emerging legislation and initiatives include the Task Force on Climate-related Financial Disclosures⁴⁸, the Taskforce on Nature-related Financial Disclosures⁴⁹ and proposals to revive environment, social and governance (ESG) standards in the United States and Europe⁵⁰. Fiji’s Climate Change Act⁵¹ will also require large companies to include climate risk disclosures in their financial reporting and encourages companies to adopt voluntary emissions reporting. These requirements are set to increasingly influence operational decisions in the travel and tourism sector – particularly for multinational hotel groups and their supply chains. On the demand side, corporate customers, committed to reducing emissions in line with initiatives like the Science-Based Targets Initiative⁵², are also increasingly making booking decisions that align with their energy, waste and water targets.

Numerous conservation organisations have active partnerships with tourism operators, including the Manta Trust, Mamanuca Environment Society, Wildlife Conservation Society, National Trust and NatureFiji-MareqetiViti. Working to promote and strengthen these partnerships can support conservation and sustainability efforts within the tourism sector.

Integrating sustainability principles and existing climate, environmental and biodiversity commitments into Fiji’s NSTF, investment promotion, planning guidelines and licensing is important to create the enabling environment for the shift required in the tourism industry’s trajectory.

This includes:

- Identifying appropriate entry points within proposed industry minimum standards, an operator code of conduct and a streamlined hotel licensing regime is critical to embedding sustainability considerations within future investment and decisions.
- Adopting sustainability principles that could guide future tourism development.

46 Scheyvens et al. 2023.

47 Twenty31.

48 Climate Disclosure Standards Board, 2021

49 Taskforce on Nature-related financial Disclosure (TNFD), 2022

50 Kimpel et al., 2021, Chen et al 2022

51 Government of Fiji, 2021

52 Science-based Targets Initiative

- Stronger partnerships between tourism operators and conservation organisations to ensure that the tourism sector understands the conservation space and how best to contribute to it, building on work already underway and in-country expertise.
- Identifying areas of key biodiversity that require protection and restrictions on tourism development.
- Identifying locations that require restrictions on tourism development due to environmental or cultural assets.

Tourism faces a range of significant sustainability-related challenges. However, with growing awareness of the need and value of conserving unique natural, social and cultural assets, there is increasing motivation for the private and public sectors to invest in making tourism more sustainable. Investment in sustainable tourism offers environmental and social benefits, as well as opportunities to generate significant returns, notably in energy, water, waste and biodiversity.⁵³

Public sector interventions should aim to support tourism's potential for economic development, and social inclusion. Mechanisms need to be developed to classify and respond to proposed investment in carbon intensive and polluting technologies or under-investment in low-carbon, climate-resilient, resource-efficient technologies. The high environmental quality that attracts tourists can often be diminished by those same tourists and services that cater to them, through increased pollution and depletion of natural resources, water and biodiversity, among others. Media articles describing increasing pollution and waste in destinations such as Bali have proven a deterrent for visitors. Improved awareness of the importance of taking action to address waste management, recycling, and carbon intensive energy is needed to match the image of Fiji as a tropical paradise that is promoted to the world, with its reality.

Another area of focus is devising appropriate mechanisms to leverage private investment, especially as government budgets tighten. Investment and financing for sustainable tourism development does not necessarily require the creation of new instruments, but rather better connecting tourism projects with available green and other financing instruments.

Fiji is playing a key role in piloting new forms of financing such as Green and Blue Bonds and the Drua Incubator. Other financial products, such as tax incentives for artists and performers, are available but there is little information available on their uptake. Further exploration is needed to determine what would be the right mix of financing instruments, tax incentives and public-private partnerships.

The scale of transition to a green, low-emission and climate-resilient circular economy is a huge structural adjustment. Tourism has a key role to play as the sector can contribute to increasing employment rates and decent work, enhancing social cohesion, and creating opportunities for suppliers across many different industries with the right mix of political will for-purpose investors and a committed and coordinated government and private sector.

Financing the transition to a more sustainable model of tourism development will require addressing several challenges, however, including the suitability of available finance instruments, information on the impact of green investment in tourism, (dis)incentives to adopt green business practices, and the extent to which the policy framework is supportive. Successful policy interventions require significant co-operation and coordinated strategies across and between different levels of government as part of a comprehensive national long-term plan, given the length of time needed to realise environment preservation measures. It also requires private sector and civil society involvement and the sharing of best practices and new ideas between various actors driving the shift to a new model of sustainable tourism development.

53 UNWTO 2021.

Topic 10: Enhancing risk management in tourism

Key Messages and Recommendations:

- There is a need for a holistic and intentional approach to risk management.
- To address the ongoing migration of workers, the industry must do more to strengthen the attractiveness of the industry.
- As climate risks continue to intensify, addressing key threats to natural capital and infrastructure from climate change requires prioritisation of genuine sustainability measures by the tourism sector to protect assets on which it depends.
- Urgent action is required by all tourism operators to reduce their environmental impacts on ecosystems.
- Climate and disaster risks must be incorporated into new tourism development, Investment Fiji guidance, city and town council planning guidelines and rural and community development planning.
- Institutionalising crisis management systems used during COVID-19 could support ongoing coordination and collaboration in managing risks. This includes formalising the Tourism Recovery Team, which includes government and private sector actors.

The tourism sector in Fiji is no stranger to risk management. The management and recovery from various shocks (military coups, climate and disaster risks including cyclones, floods, COVID-19) have given the public and private sectors significant practice at managing risks. Disaster risks are intensifying with the impacts of climate change.

In response, a holistic and intentional approach to risk management is required. As tourism development evolves, there is a need to improve services in high-volume tourism areas, encourage business diversification and address broader social and cultural risks to tourism growth. To address the ongoing migration of workers post-pandemic, the industry must do more to elevate the attractiveness of the industry, such as through improved wages, benefits, contracts and professional development programmes.

As climate risks continue to intensify, addressing key threats to natural capital and infrastructure from climate change requires the prioritisation of genuine sustainability measures by the tourism sector to contribute to protecting the assets on which the tourism industry depends and avoid allegations of greenwashing.

Even optimal disaster risk management systems and coordination mechanisms will not maintain tourism growth if environmental quality deteriorates to the point that coral reefs and beaches are no longer attractive. Urgent action is required by all tourism operators to reduce their own environmental impacts on ecosystems. This includes ensuring that cleaning products used are not harmful to the ecosystems around them, improving waste and water management processes, and engaging guests in environmental restoration and education activities.

Given current trajectories, emissions will continue to rise, worsening environmental impacts and accelerate potential losses from a combination of cyclones, ocean acidification, and a warming ocean. The loss of these environmental assets will affect many people and the economy. Climate and disaster risks must be incorporated into new tourism development, investment guidance, city and town council guidelines and rural and community development planning.

Various lessons from the COVID-19 pandemic and previous crises could be institutionalised to support risk management. An assessment of Fiji's current arrangements against a matrix of identified risks and the Pacific Sustainable Tourism Standard for Destinations identified straightforward risk management strategies that could be adopted. Institutionalising some of the crisis management systems used during the pandemic would support ongoing coordination and collaboration in managing risks. This includes formalising the Tourism Recovery Team, which includes government and private sector actors.

Topic 11: Monitoring and evaluation for sustainable tourism

Key Messages and Recommendations:

- Policymakers need information to make informed decisions in the tourism sector's best interests.
- Currently, most indicators used to track sectoral performance are economic focused rather than measuring tourism more holistically.
- Agreeing on and strengthening knowledge management systems and inter-agency coordination would help ensure that tourism sector-related information is collected, analysed and shared in an accessible manner.
- MTCA should play a key coordination role in ensuring relevant information is available in a timely manner to support evidence-based policy and decision-making, by government and industry.
- There is limited information to measure tourism's social impact, including understanding community attitudes with respect to tourism and how activities contribute to cultural identity.
- There is a need for a simple, yet robust monitoring, evaluation and learning framework for the NSTF to track progress, including alignment with the United Nations Sustainable Development Goals (SDGs).

Tourism provides a wide range of benefits to different segments of the economy and society. Tourism also generates economic, environmental and social costs, some of which are reflected in the economic data collected, but many are not and can therefore be considered externalities.

Policymakers need information to make informed decisions for the tourism sector. Currently, most indicators used to track sectoral performance are economic-focused⁵⁴ rather than measuring tourism more holistically.⁵⁵ There is a need to agree on and strengthen knowledge management systems and inter-agency coordination to ensure tourism sector-accessible to all stakeholders. The MTCA should play a key coordination role in ensuring relevant information is available in a timely manner to support evidence-based policy and decision-making, by government and industry.

Whilst some progress has been made to improve tourism statistics, there is limited information to measure tourism's social impact, including understanding community attitudes with respect to tourism and how its activities contribute to cultural identity. There is a need for ongoing engagement with relevant ministries and stakeholders to determine how best to track this over time and whether a host perception study would be feasible.

54 Visitor arrivals, spend per visitor, value to the economy and employment.

55 Including resource use of the tourism sector, impact of tourism on cultural and traditional knowledge, perceptions of value of the industry to Fijians.



Sustainable Development Goals

There is also a need to have a simple, yet robust monitoring, evaluation and learning framework for the NSTF to ensure that the MTCA is tracking progress against key priorities set out in the framework and in line with the United Nations SDGs.

The relevant SDG targets related to tourism are:

- Target 8.9: By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.

Target 12.b: Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.

- Target 14.7: By 2030, increase the economic benefits to Small Island Developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism.

Pacific Tourism Indicators

The SPTO is currently developing Sustainable Tourism Indicators for its Pacific Island members. Acknowledging the critical role of tourism in economic development in the region, the indicators will seek to support a more holistic approach to measuring and monitoring tourism development in the region. The indicators will be an extension to the current economic variables and will also expand to comprise other imperative variables such as environmental, social, and cultural measures that will strengthen the statistical base of tourism information in the region.

The indicators will operate under the work of the Pacific Tourism Statistics Strategy (PTSS) which aims to develop and strengthen the statistical base for tourism information in support of the Pacific Sustainable Tourism Policy Framework (PSTPF) and the Digital Marketing Strategy which envisages a more resilient, prosperous and inclusive tourism⁵⁶.



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STAKEHOLDER ENGAGEMENT



4. STAKEHOLDER ENGAGEMENT

The views of stakeholders are critical to the process. Extensive consultations were conducted via a series of public-private dialogue sessions and focus group discussions.

Thirteen public-private dialogue (PPD) webinar sessions were held (August 2022 - March 2023) along with six focus group discussions (March-May 2023), with a total of 660 participants⁵⁷. The PPD session speakers are listed in, **Annex 1 - Stakeholder consultations** and recordings from the webinars are available at: <https://mcttt.gov.fj/division/tourism/national-sustainable-tourism-framework/>

Public-Private Dialogue and Focus Group Discussions

The 13 PPD webinars explored: 1) Overview: The Here and Now, 2) Walking the Talk: Private sector sustainability initiatives, 3) Inclusivity in tourism: enabling respectful and equitable workplaces, 4) Embedding resilience in future tourism planning, 5) MSMEs: Financial challenges and solutions, 6) Development goals and public infrastructure, 7) Tourism as a preferred employer, 8) Greening the tourism industry, 9) Strengthening tourism linkages, 10) Product and experience development, 11) Growth of Airbnb in Fiji, 12) Cruise ship market and 13) Future opportunities for tourism entrepreneurs.

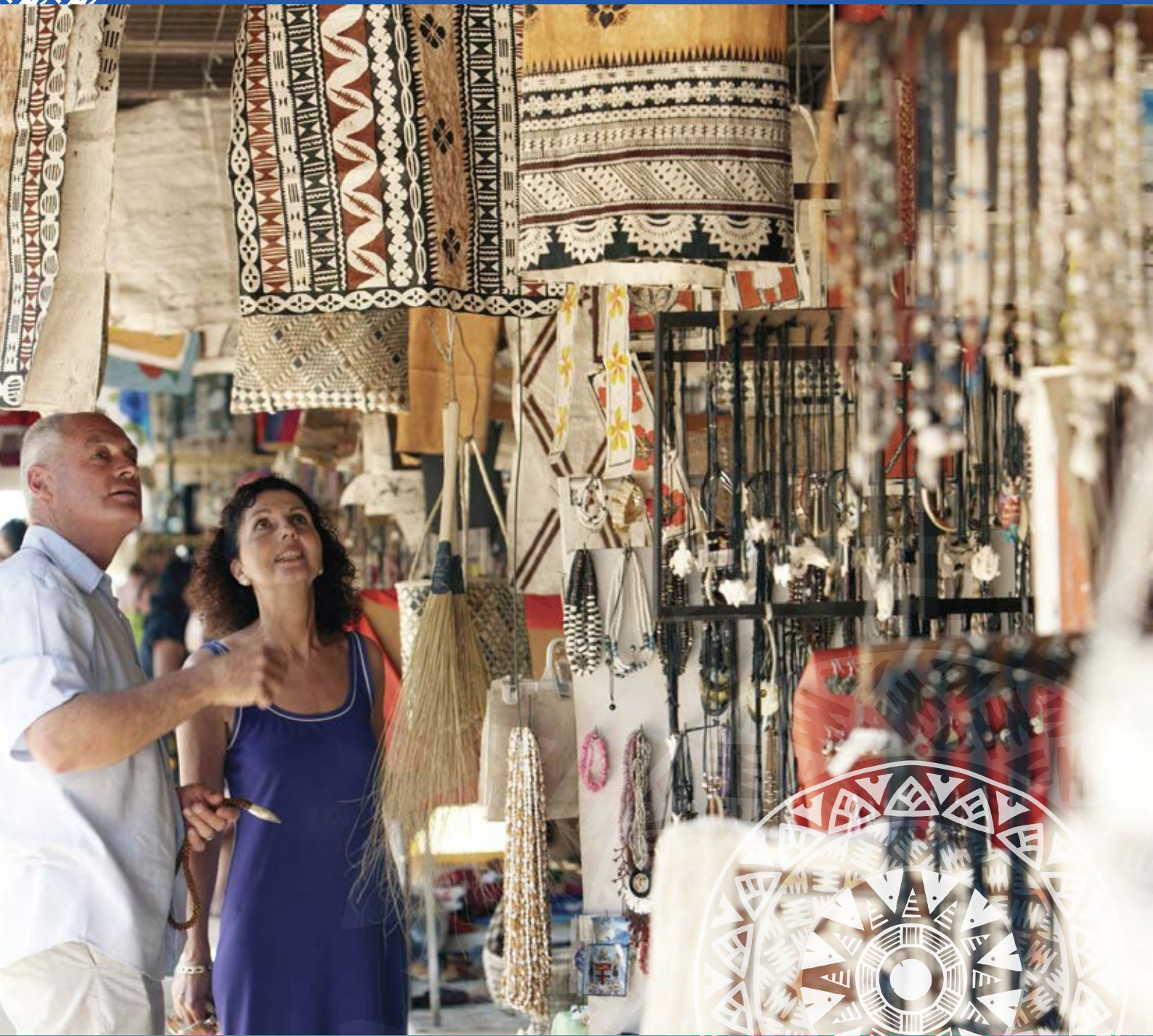
The Focus Group Discussions focused on: 1) Agritourism, 2) Conservation and Tourism, 3) Finance and investment, 4) Visitor economy - the evidence base, 5) Community-based tourism and 6) Tourism standards.

A summary of the consultations, including key messages and recommendations from speakers and participants in these sessions⁵⁸, is presented in **Annex 2 - Summary of key messages from PPD and Focus Group Discussions**

Key messages and 5. CONSOLIDATED RECOMMENDATIONS BY NSTF GOALS are inputs from participants during the session and should not be interpreted as the views of, nor endorsement by, MTCA or IFC.

⁵⁷ Total attendance – participants attending multiple sessions are counted multiple times.

⁵⁸ Key messages and recommendations are recorded as inputs from participants and should not be interpreted as the views of MTCA or IFC.



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CONSOLIDATED RECOMMENDATIONS

5. CONSOLIDATED RECOMMENDATIONS BY NSTF GOALS

A list of consolidated recommendations that emerged from the Phase A literature review, baseline assessment and stakeholder engagement are presented below, organised under the PSTPF Goals (which have been adopted for the NSTF - refer **IDEATION WORKSHOP** below). While entities and agencies to take these recommended actions forward are suggested, the list of roles and responsibilities is indicative and not exhaustive. In many cases, it will require consolidated and coordinated effort by multiple entities to effect change.

PSTPF/NSTF Goal 1: Prosperous Economies

Tourism supports prosperous and resilient economies

Key issue	Recommended actions	Responsibility
<p>Improve the policy and regulatory environment.</p> <p>Policy incoherence across government agencies, compounded by a challenging business and investment climate, constraints tourism business growth. Tourism SMEs are particularly hit, as they commonly spend a disproportionate amount of time on regulatory compliance rather than strategic business growth and development.</p>	<p>Continue engagement to accelerate business reforms, including streamlining licensing processes.</p> <p>Reform hotel licensing and liquor licensing regulations to reduce the regulatory burden on businesses. Consider the introduction of differential requirements for SME and mataqali-led operators.</p> <p>Remove requirements for businesses to attend hearings as part of licensing processes.</p> <p>Coordinate inspections (fire, health, OHS, maritime safety) across agencies to reduce coordination burdens on operators. Divisional government offices, city and town councils could play a more active role in coordination through designation of 'investment or business facilitation' officers with responsibility for unlocking and streamlining compliance.</p> <p>Assess options for streamlining inspections to allow for multi-year approvals as well as smaller and remote island properties to host virtual inspections.</p>	<p>MTCA, MTCSC, Office of the Solicitor-General, Hotel Licensing Board, Ministry of Health, Maritime Safety Authority of Fiji</p>
<p>Increasing demand for room inventory and expanded opportunities for smaller operators through platforms such as Airbnb.</p>	<p>Increase MTCA resources to play a more active role in whole-of-government coordination, including placing an MTCA official in each divisional government office.</p> <p>Develop minimum tourism standards and assess which parts of current legislation and regulations could be moved to standards rather than legislation.</p>	<p>MTCA, Hotel Licensing Board, Solicitor General, IFC</p> <p>MTCA, Airbnb, Tourism Fiji</p>
<p>Absence of guidance for operators to grow this segment of the tourism market.</p>	<p>Reform hotel licensing requirements to establish a separate category for homestays, short-term rentals and small accommodation providers.</p> <p>Formalise an association/working group of Airbnb, short-term rental providers to articulate a collective voice to MTCA.</p> <p>Formalise a partnership and training programmes with Airbnb Australia to promote compliance within its systems.</p>	

Key issue	Recommended actions	Responsibility
<p>Further develop the visitor economy.</p> <p>Developing a solid evidence base for tourism is critical.</p> <p>Various agencies have a role in generating and managing tourism data. MTCA does not currently have the internal capacity to coordinate and consolidate relevant data and information useful for tourism decision-makers.</p>	<p>Recruit statistical/analyst capacity within MTCA to ensure relevant existing information is consolidated and made available to users in a timely way.</p> <p>Invite FBoS and RBF to the Tourism Statistics Taskforce and/or ensure regular meetings between interested stakeholders (MTCA, RBF, FRCS, FBoS, Tourism Fiji, Ministry of Finance) to share information and harmonise key statistics.</p> <p>Harmonise the data sources currently being used (STR and FBoS for hotel occupancy, Fiji Airways forward-looking flight sales, RBF on macro-economic forecasting, FBoS for visitor arrivals, tourism earnings, IVS for visitor spend).</p>	<p>MTCA, Fiji Bureau of Statistics, Tourism Fiji, Reserve Bank of Fiji, Fiji Airways, Fiji Revenue and Customs Services</p>
<p>Grow the asset and experience inventory.</p> <p>Strengthen the ability of women, mataqali and community-led tourism enterprises to participate equitably within tourism value chains.</p>	<p>Formalise partnerships between MTCA, MSME Fiji and Investment Fiji (partly now in place as part of the Investment Facilitation Committee)</p> <p>Given MTCA's limited capacity, consider outsourcing private sector advisory roles to tourism MSMEs through partnerships with business development service providers. Coordinate with government agencies involved in providing support to communities to grow tourism businesses (Ministry of Rural and Maritime Development, Ministry of iTaukei Affairs, iTaukei Trust Fund, TLTB).</p> <p>Grow awareness of different business and partnership options for communities in the tourism industry based on existing models.</p> <p>Develop partnerships with business associations to direct firms in need of advice to appropriate service providers.</p> <p>Develop partnerships with external business development programmes to direct firms in need of advice to appropriate service providers.</p>	<p>MTCA, MTCSC, Ministry of Rural and Maritime Development Ministry of iTaukei Affairs, Heritage and Culture, iTaukei Trust Fund, iTaukei Land Trust Board</p> <p>Private sector business development service providers, including the newly proposed Business Development Services Council at the Fiji Commerce and Employers Federation (FCEF)</p> <p>MTCA, Tourism Fiji, Investment Fiji</p> <p>Business associations, including Destination Management Organisations (Savusavu Tourism Association, Taveuni Tourism Association, Tourism Suncoast, Tourism Kadavu, Duavata Sustainable Tourism Collective)</p> <p>Business development support programmes, incubators and accelerators such as GGGI's Greenpreneurs, ygap's yher programme, Fiji Enterprise Engine, Academy of Women Entrepreneurs, Business Link Pacific, Business Assistance Fiji</p>

Key issue	Recommended actions	Responsibility
<p>Target high-value visitors through marketing material and niche segment development.</p>	<p>Identify niche and experiential growth segments such as luxury, wellness, meetings, incentives, conferences and events (MICE), sports tourism, film productions, experiential and immersive tourism.</p> <p>Develop guidelines for maximising economic value and promoting social, environmental and cultural sustainability of film productions and events.</p> <p>Develop partnerships with research institutions and agencies to expand the quality and relevance of tourism research.</p> <p>Consolidate Fiji supplier lists to ensure event supplies are procured in-country wherever possible.</p>	<p>Tourism Fiji, Investment Fiji, Film Fiji</p> <p>Tourism Fiji, Film Fiji</p> <p>USP, FNU, International research agencies</p> <p>MTSCS, industry associations, Tourism Fiji, Film Fiji</p>
<p>Facilitate and secure investments aligned to overall NSTF pillars of promoting cultural, community, experiential and indigenous tourism.</p> <p>Promote joint ventures and equity consortia with Fijian investors.</p>	<p>Ensure messaging relating to investment promotion is clear and aligned to the NSTF.</p> <p>Strengthen partnerships between investment-tourism as well as conservation-cultural organisations to ensure policy coherence across environmental, cultural and economic development goals.</p> <p>Expand capacity within relevant agencies for structuring complex tourism investments.</p> <p>Develop guidelines for structuring partnerships between indigenous trusts and external investors building on existing models in Fiji and the region (such as Māori trusts in New Zealand).</p>	<p>Investment Fiji, Tourism Fiji, Investment Fiji</p> <p>Investment Fiji, Ministry of iTaukei Affairs, iTaukei Affairs Trust Fund, National Trust, conservation organisations, Fiji Arts Council</p> <p>Investment Fiji, Ministry of iTaukei Affairs, iTaukei Affairs Trust Fund, TLTB, Financial institutions</p>
<p>Maintain a stable investment climate and a predictable tax regime.</p> <p>Improve ease of doing business for tourism entities.</p>	<p>Enhance analytical capability within MTCA, Reserve Bank of Fiji, Investment Fiji and Ministry of Finance to deepen the collective knowledge base on how economic, political and tax regime stability benefit tourism investment performance, visitor economy and tourism tax base.</p> <p>Promote partnerships within academic and research institutions to better model the impact of the regulatory and investment climate on tourism growth, development and leakages.</p> <p>Streamline relevant approval processes by strengthening coordination through the Investment Facilitation Committee.</p>	<p>MTCA, RBF, Investment Fiji, Ministry of Finance</p> <p>MTCA, USP, FNU, international research organisations</p> <p>Investment Facilitation Committee</p>

Key issue	Recommended actions	Responsibility
<p>Ensure infrastructure planning accounts for tourism needs and opportunities for growth, including digital infrastructure.</p>	<p>Work with infrastructure providers and utilities (WAF, EFL, city and town councils) to identify and improve infrastructure to support sustainable tourism expansion and dispersal.</p> <p>Contribute to the National Infrastructure Investment Plan to ensure these issues are reflected in its planning process.</p> <p>Connect MSMEs with ecommerce and financing solution providers.</p> <p>Invest in public IT infrastructure as a foundational requirement for all tourism operators, especially in burgeoning tourism sectors, including remote and blended working.</p>	<p>WAF, EFL, city and town councils, FRA</p> <p>Ministry of Public Works</p> <p>Communication providers, tech companies</p> <p>Communication providers</p>
<p>Promote a whole-of-government and whole-of-society approach to tourism planning.</p>	<p>The NSTF needs to have ownership from across a wide range of stakeholders. This requires in-depth consultations within the government and with private sector partners.</p> <p>Establish (or utilise the existing steering committees) for provision of whole-of-government advice on how to shift tourism to a more sustainable trajectory.</p> <p>Organise a high-level demonstration of commitment from the whole of government and the private sector.</p> <p>Organise a high-profile media campaign to support the NSTF review process.</p> <p>MTCA to formalise partnership with the Ministry of Rural and Maritime Development and Disaster Management and visit each Divisional Commissioner to hold tourism planning meetings.</p>	<p>MTCA</p>
<p>Improve risk management capabilities within the tourism sector.</p>	<p>Support MSMEs and tourism businesses to develop business continuity plans and build contingency funds to access in time of need.</p> <p>Expand insurance options, including parametric insurance, for tourism operators.</p> <p>Strengthen risk and hazard assessments, and meteorological services to support risk management practices.</p>	<p>MTCA, FHTA, SOFTA, industry associations</p> <p>Insurance providers, Fiji Met Service</p> <p>Risk management business advisory services</p>

Key issue	Recommended actions	Responsibility
<p>Enhance workplace skills development and improve employee retention.</p>	<p>Support development and institutionalisation of industry-led training and hospitality courses and apprenticeships.</p> <p>Examine the impact of potential partnerships with development agencies to co-finance training programmes, acknowledging that many workers are departing for Australia and New Zealand.</p> <p>Support industry-led training academies to expand and professionalise. Examine different strategic options for employee retention and support the industry with advice.</p> <p>Develop financing options for vocational training.</p> <p>Advocating entrepreneurship and emerging skills such as digital, entrepreneurial and green skills.</p>	<p>USP, FNU, TVET providers</p> <p>DFAT, MFAT, Pacific Labour Mobility programmes</p> <p>FHTA</p> <p>Ministry of Finance, Fiji Revenue and Customs Service</p>
<p>Improve the performance of the cruise and yachting sector to help drive the overall visitor economy.</p>	<p>Enhance infrastructure and develop cruise- and yacht-specific infrastructure over the long term, such as a cruise terminal.</p> <p>Explore partnerships to attract expedition cruise vessels and yachts to Fiji.</p> <p>Update and improve Fiji hydrographic maps to expand options for expedition cruise ships and yachts.</p> <p>Document examples of successful partnerships between cruise operators, aggregators and community operators.</p> <p>Expand e-commerce platforms to support small businesses to connect with tourism markets.</p>	<p>Ports Authority, Department of Transport</p> <p>Investment Fiji, Tourism Fiji</p> <p>MSAF</p> <p>MTCA</p> <p>Commercial banks, telecommunication providers</p>

PSTPF/NSTF Goal 2: Thriving and Inclusive Communities

Tourism supports the empowerment and wellbeing of our communities

Key issue	Recommended actions	Responsibility
<p>Improve inclusivity and career pathway development within the tourism sector.</p>	<p>Support industry associations to develop mentoring programmes that support women's leadership within the tourism industry.</p> <p>Support operators to institutionalise inclusive human resources policies and practices, e.g. flexible work, anti-harassment and anti-domestic violence efforts.</p> <p>Develop guidance for employers on how to manage cultural sensitivities and differential power. Develop capacity for facilitating uncomfortable conversations.</p> <p>Identify peer-to-peer partnerships between SMEs and larger operators to facilitate mentoring opportunities across the sector.</p>	<p>MTCA, FHTA, SOTFA, Industry Associations</p> <p>Industry and Employer Associations, Development Partners</p> <p>MTCS, incubation and accelerator programmes</p>
<p>SME operators, in particular mataqali-led businesses, cannot easily connect to tourism value chains.</p> <p>Smaller operators struggle to access information relating to experience development and changes in market trends.</p> <p>Business enabling environment not conducive to smaller business.</p>	<p>Tourism Fiji to further develop its product and experience development role. Provide regular and contextualised market intelligence to tourism SMEs and support them to develop marketing materials and content.</p> <p>Ensure SMEs are supported through the startup phase with coaching and mentoring, connections to government ministries, industry stakeholders and regular network opportunities. Consider outsourcing business advisory services given limited capacity within government.</p> <p>Develop tourism-focused incubation programmes that support rural and community-based operators to acquire skills needed to develop tourism products and experiences.</p> <p>Document case studies of successful partnerships between smaller and larger tourism businesses working together within tourism value chains.</p> <p>Work with insurers to find a suitable public liability insurance product for MSMEs.</p>	<p>Tourism Fiji</p> <p>MTCA, Ministry of iTaukei Affairs, Heritage and Culture, iTaukei Trust Fund Board, National Trust of Fiji</p> <p>Entrepreneur support organisations, incubation and accelerator programmes</p> <p>Insurance companies</p>

Key issue	Recommended actions	Responsibility
<p>Connect operators to timely and reliable market intelligence to better position their experiences and accommodation.</p> <p>Tourism entrepreneurship training is not widely available to support the growth of the next generation of tourism entrepreneurs.</p>	<p>Tourism Fiji to continue providing information, market intelligence and outreach to SMEs to develop marketing materials and content. Provide greater visibility and support to market their experiences.</p> <p>Evaluate past efforts to stimulate rural tourism and document the various organisational models suited to community and mataqali-owned businesses. Focus on community tourism that minimises disruptions and is non-instructive.</p> <p>Improve authenticity of village experiences by supporting aggregators, operators and communities to understand the value of tourism and the types of experiences they can provide.</p> <p>Strengthen relationships between MTCA, Tourism Fiji and iTaukei institutions to work with and through vanua to obtain support. Consider re-establishment of the Roko Tui Saravanua role.</p>	<p>Tourism Fiji, MTSCS, business development advisors, Ministry of Rural and Maritime Development, Ministry of iTaukei Affairs, TLTB</p>
<p>Expand experience development, niche market segmentation and supporting infrastructure.</p>	<p>Ensure infrastructure planning and development considers potential future experience development.</p> <p>Unlock transport and infrastructure access to potential tourism sites, including ones close to Nadi and remote mataqali-owned sites with large potential.</p> <p>Adjust lease conditions to allow for niche market segment development, such as agritourism.</p>	<p>Ministry of Public Works, Investment Fiji</p> <p>TLTB</p> <p>TLTB</p>

PSTPF/NSTF Goal 3: Visible and Valued Cultures

Tourism amplifies and promotes our culture and heritage

Key issue	Recommended actions	Responsibility
<p>Loss of traditional skills and knowledge.</p> <p>Commodification of culture within certain parts of the tourism sector.</p> <p>Low quality and imported artefacts prevalent within the sector.</p>	<p>Incorporate stewardship and indigenous principles and values within the NSTF.</p> <p>Build on the Code of Conduct for operators, expand guidance with the Ministry of iTaukei Affairs, Heritage and Culture that can be provided to operators and guests to deepen visitor understanding of Fijian culture.</p> <p>Support development of standards to ensure cultural sustainability measures are practiced across industry.</p> <p>Work with retailers to improve representation and authenticity of culture and heritage.</p> <p>Showcase good practice examples of partnerships between tourism operators, visual artists, dance and musical performers. Develop listings of suppliers that can be contracted for events, performances and film productions.</p> <p>Improve transparency across value chains, particularly in relation to benchmarking pricing for services to avoid a 'race to the bottom'.</p> <p>Invest in revival of traditional arts and storytelling</p>	<p>MTCA, Ministry of iTaukei Affairs, Heritage and Culture, iTaukei Trust Fund,</p> <p>MTCA, Tourism Fiji, Ministry of iTaukei Affairs, Heritage and Culture, iTaukei Trust Fund</p> <p>City and town councils, retailer associations, Fiji Arts Council, cultural practitioners, academic institutes</p> <p>Fiji Arts Council, industry associations, Viti Association of Visual Artists, Fiji Islands Dance Association</p> <p>FHTA, MSME Fiji, Tourism Fiji, Fiji Arts Council, industry associations, Viti Association of Visual Artists, Fiji Islands Dance Association, Film Fiji</p>
<p>Many international brands do not showcase Fijian culture within interior designs.</p>	<p>Strengthen partnerships between arts associations, interior designers and hotel brands to promote Fijian art and suppliers to hotels.</p>	<p>FHTA, Fiji Arts Council, Viti Association of Visual Artists, Ministry of iTaukei Affairs, Culture and Heritage</p>



PSTPF/NSTF Goal 4: Healthy Islands and Oceans

Tourism accelerates climate action, protects our ecosystems and supports resilience

Key issue	Recommended actions	Responsibility
<p>Deepening climate and biodiversity crisis.</p> <p>Despite increasing sustainability initiatives within the tourism sector, no common language nor standards and 'greenwashing' risks are apparent.</p> <p>Absence of user-friendly tools to support awareness, training and reporting.</p> <p>Small businesses are wary about additional compliance obligations relating to sustainability.</p>	<p>Support development of standards to ensure cultural sustainability measures are practiced across industry.</p> <p>Develop Fiji-specific user-friendly tools for operators to improve voluntary emissions reporting.</p> <p>Strengthen partnerships between conservation organisations, tourism associations and businesses.</p> <p>Incorporate climate risks disclosures into financial reporting in line with provisions of the Fiji Climate Change Act 2021.</p> <p>Strengthen capability within accounting firms and large businesses to report on emissions and climate risk disclosures.</p>	<p>MTCA, Tourism Fiji, FHTA, Duavata Climate Change and International Cooperation Division, Department of Environment, FCCC.</p> <p>Business support organisations including Business Assistance Fiji and Business Link Pacific</p> <p>Tourism associations, conservation non-governmental organisations</p> <p>Institute of Accountants, FHTA, SOFTA</p>
<p>Demand for improving sustainability practices is high, but suppliers and infrastructure providers cannot necessarily meet this demand.</p> <p>Tourism investment incentives, lending facilities and licensing processes do not currently include sustainability criteria.</p>	<p>Work with infrastructure providers to identify and improve infrastructure to support sustainability.</p> <p>Ensure tourism demand for improved sustainable practices are reflected in the National Infrastructure Investment Plan planning process.</p> <p>Incorporate sustainability requirements into tourism investment incentives and loan packages offered through the Fiji Development Bank.</p> <p>Incorporate sustainability measures within tourism minimum standards.</p>	<p>Climate Change Division, Department of Environment</p> <p>WAF, EFL, city and town councils, renewable energy suppliers, waste recycling organisations.</p> <p>Ministry of Finance, Fiji Revenue and Customs Service, Fiji Development Bank</p> <p>MTCA, Tourism Fiji</p>
<p>Inadequate available expertise to accelerate a transition to greener technologies.</p>	<p>Identify in-country expertise and suppliers relevant to accelerating sustainability measures (water conservation, green buildings, energy audits) and work with tourism operators to raise awareness of financing instruments and models that can support adoption.</p> <p>Raise awareness of the value of healthy oceans and marine resources for tourism and communities that depend on them.</p> <p>Promote sustainability initiatives that highlight best practice and community engagement through Tourism Fiji and other channels.</p> <p>Adapt the Pacific Tourism Organisation's regional standards to develop Fijian sustainability standards to support adoption of best practice measures.</p> <p>Connect conservation organisations (largely Suva-based) with tourism operators to identify strategic partnerships, particular in key biodiversity areas.</p>	<p>External specialist business advisory service providers including incubation and accelerator programmes specifically targeting green enterprise development.</p> <p>Business Assistance Fiji, Business Link Pacific, Resort Support, GGGI Pacific Greenpreneurs.</p> <p>Tourism Fiji, Private sector</p> <p>SPTO, MTCA</p> <p>Conservation organisations</p>

Key issue	Recommended actions	Responsibility
<p>Accelerate the transition to net zero through incentivising investments in greener transport and infrastructure.</p>	<p>Identification and matchmaking of investors, financing instruments and operators to support system-level decarbonisation including e-transport, wind and solar sail options and renewable energy.</p> <p>Pilot sustainable sea transport options building on the existing Sustainable Sea Transport initiative.</p>	<p>MTCA, Ministry of Public Works, Investment Fiji, institutional investors, impact investors, deal flow developers, financing institutions</p> <p>E-Transport, sailing and renewable energy suppliers</p>
<p>Promote awareness among industry of good practice sustainability measures including sustainable procurement policies.</p> <p>Promote awareness and documentation of best practice partnerships between conservation organisations, communities and tourism operators.</p>	<p>Elevate the importance of waste management to urgently address needed investments.</p> <p>Develop standards to support tracking sustainability progress and accelerate adoption of best practices.</p> <p>Improve information available for operators to support best practice waste management, for example by developing supplier lists of green investment providers.</p> <p>Pursue Sustainable Destination GSTC certification.</p> <p>Document case studies of revenue sharing and financing pathways for conservation tourism.</p> <p>Environment related taxes such as ECAL to be accessible by conservation organisations to support development of conservation tourism-focused social enterprises.</p> <p>Connect social enterprises with available sources of finance and investment.</p> <p>Expand the use of credit guarantee loans to finance renewable energy and other green investments.</p>	<p>Tourism Fiji, Investment Fiji, Department of Environment MTCA, Tourism Fiji</p> <p>Department of Environment,</p> <p>MTCA, Tourism Fiji</p> <p>Ministry of Finance</p> <p>Investment Fiji</p> <p>Reserve Bank of Fiji, Fiji Development Bank, commercial banks</p>



- 6 -
IDEATION
WORKSHOP

6. IDEATION WORKSHOP

To further develop and prioritise recommendations that emerged from the baseline assessment, PPD sessions and focus group discussions, an ideation session was held on May 19, 2023, led by the MTCA. The session was chaired by the Permanent Secretary of the MTCA and included staff from the Department of Tourism.

Representing the NSTFSC were Tourism Fiji, the Fiji Hotel and Tourism Association. IFC and Talanoa Consulting provided facilitation and inputs. SPTO's Sustainable Tourism Manager joined the first session to share insights from consultations that led to the development of the Pacific Sustainable Tourism Policy Framework (PSTPF).

The ideation workshop objectives were to:

- Confirm use of the PSTPF as the overarching structure to which the Fiji NSTF will align.
- Examine emerging priorities and actions and map them to the four Goals of the NSTF (mirroring the four Goals of the PSTPF).
- Allocate the validated priorities and actions to sit within either the Framework (strategic priority) or Action Plan (implementation priority).
- Conduct a 'future visioning' exercise for tourism in 2034 to assess whether the identified actions will help realize that vision.
- Revalidate the priorities and actions that should be in the NSTF and accompanying 3-year Action Plan.

Session 1: Foundations in the PSTPF

The SPTO Sustainable Tourism Manager provided lessons learnt from the PSTPF (**refer Pacific 2030 Sustainable Tourism Policy Framework**, above). The PSTPF was developed by the SPTO on behalf of its members, including the governments of American Samoa, Cook Islands, Federated States of Micronesia, Fiji, French Polynesia, Kiribati, Nauru, Marshall Islands, New Caledonia, Niue, Papua New Guinea, Samoa, Solomon Islands, Timor Leste, Tokelau, Tonga, Tuvalu, Vanuatu, Wallis & Futuna and Rapa Nui and over 200 private sector members from all parts of the tourism industry throughout the Pacific. It was endorsed by SPTO's membership on November 3rd, 2021.

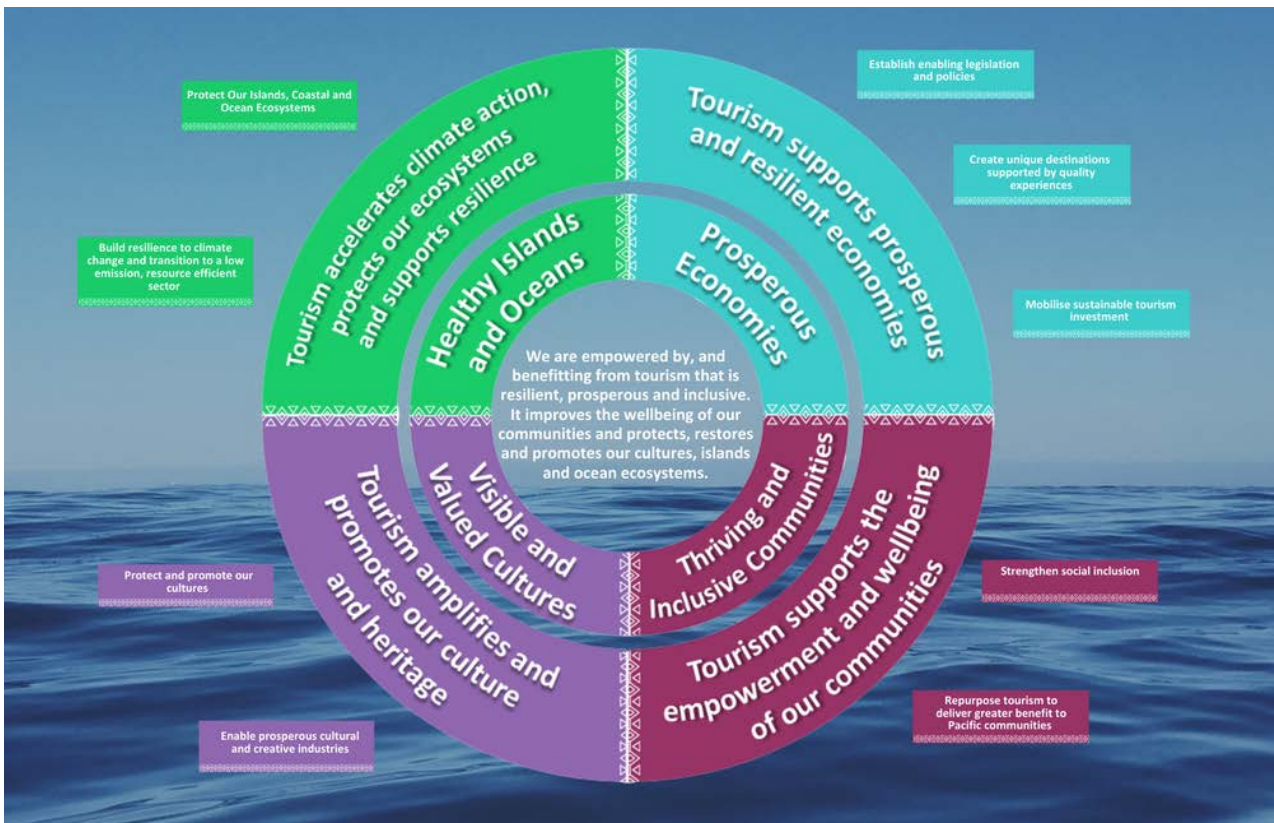
SPTO's consultations included seeking inputs from Fiji stakeholders, including members of the NSTFSC. SPTO highlighted the importance of such extensive consultations which meant that when the framework was adopted, it had already garnered significant ownership from its membership, both government and private sector representatives.

SPTO summarised the PSTPF four Goals and their priorities: Goal 1: Prosperous Economies; Goal 2: Thriving and Inclusive Communities; Goal 3: Visible and Valued Cultures Goal 4: Healthy Islands and Oceans (Figure 10 below) and highlighted the framework's alignment to the GSTC. It was noted that the Pacific Sustainable Tourism Standards (PSTS-D) for Destination and for Industry (PSTS-I) are also aligned to these four Goals. After the discussion with SPTO, participants reviewed the PSTPF Goals and identified the following areas which, for a more developed destination such as Fiji (relative to other SPTO members), would benefit from greater emphasis or contextualisation in the NSTF.

Figure 9. Virtual session with SPTO Sustainable Tourism Manager



Figure 10. SPTO Pacific Sustainable Tourism Framework – Four Goals



Source: SPTO

Education, skills, and career pathway development

Given the tourism sector’s significance as an employer, Fiji needs to strategically develop a pipeline of tourism employees and support them to realize their career ambitions in the sector. This could include working with large corporate hotel brands to advance their own internal training programmes, including opportunities for Fijians to work in properties overseas and return to leadership roles in Fiji having obtained greater industry exposure.

Labour mobility

Significant numbers of Fijians are migrating for opportunities abroad as part of labour mobility programmes and with direct contracts to fill domestic labour shortages. Increasingly, the tourism sector will need to account for this in the way it recruits, trains and approaches staff retention to ensure a pipeline of available workers. This could include strengthened partnerships between industry training providers and accredited education providers to ensure staff have sufficient professional development opportunities. For larger organisations, the provision of childcare, health insurance and longer-term contracts are also being used as part of retention strategies.



Linkages between tourism and other sectors

As an established industry, Fiji's tourism sector continues to seek opportunities to strengthen links to other sectors such as agriculture, visual arts and dance, sports tourism, cultural and traditional knowledge reinforcement. Given the large agricultural and cultural sectors in Fiji, there are identified opportunities to better promote linkages across tourism value chains.

Recognition of diversity and diverse cultures

Fiji's multiculturalism is unique must be reflected as part of the contextualisation of the PSTPF.

Incorporation of Fiji's goals on decarbonization/net-zero

Fiji has strong policy commitments to climate action and resilience which must be mainstreamed across all sectors. As tourism is a significant growth sector, strengthening policy coherence across sectors by supporting tourism businesses and investors to access key information, guidance and advice is critical to achieving these goals.

Alignment to Blue Pacific 2050 Strategy

In addition to the adoption of the PSTPF, the region has also adopted the Blue Pacific 2050 Strategy which the NSTF should also align with.

Translation into vernacular for awareness and advocacy

Given the importance of tourism to Fiji's economy, society and culture, the framework should be translated into vosa vakaviti, Fiji Hindi and Rotuman to support its socialization across all parts of society. The Department of Culture and Heritage can assist with this process.

At the end of this session the four PSTPF Goals were adopted as the four Goals of the NSTF, with the priorities adapted slightly, to better fit the Fiji context (**Table 3**).

Table 3. Goals and Priorities of the NSTF

NSTF Goals (PSTPF is adopted)	1. Prosperous Economies	2. Thriving and Inclusive Communities	3. Visible and Valued Cultures	4. Healthy Islands and Oceans
	Tourism supports prosperous and resilient economies	Tourism supports the empowerment and wellbeing of our communities	Tourism amplifies and promotes our culture and heritage	Tourism accelerates climate action, protects our ecosystem, and supports resilience
NSTF Priorities (PSTPF is adapted)	i) Creating enabling policy and regulatory coherence ii) Encouraging sustainable investments iii) Creating competitive destinations with diverse experiences	i) Empowering communities and social inclusivity	i) Protecting and promoting our culture and tradition	i) Protecting our natural resources ii) Building climate resilience
Derived from NSTF Themes	Improve the policy and regulatory environment	Enhance workplace and skills	Market segmentation	Embedding sustainability across the National Sustainable Tourism Framework
	Grow our asset and experience inventory	Strengthen environment, social and cultural sustainability	Strengthen environment, social and cultural sustainability	Monitoring and evaluation for sustainable tourism
	Further develop the visitor economy		Promote financing and investment	Environment social and cultural sustainability
	Introduce Standards	Introduce Standards	Introduce Standards	Introduce Standards
	Enhance risk management in tourism			
	Enhance workplace and skills			
	Promote financing and investment			

Supported by findings of NSTF Consultations	Investment Fiji mandate changed: well placed to target investment	Market demand shifting to more sustainable experiences	Strong foundation: environment, social, cultural assets	Increasing deterioration of ecosystems underpinning tourism's foundation
	Access to finance challenging for smaller businesses	Increased interest in ownership among LOUs		Sustainability increasingly important, but no common language
	Strong policy commitments	MSMEs unable to access industry-led training and expertise		Market demand shifting to more sustainable experiences
	Political will for continued reforms to civil service culture	Seasonality affects ability to retain skilled labour		Risk of greenwashing
		Guide training only happens on the job		Increasing climate and disaster risks
		Code of conduct launched		Climate Change Act 2021
		Limited number of apprenticeships		Poor agricultural practices
				Strong policy commitments
				Increased penetration of renewable energy

Session 2: Mapping of emerging priorities and actions to NSTF Goals

The participants were split into three teams, allocated different NSTF Goals and given a set of paper ‘bubbles’ representing the individual priorities and actions that had emerged through the literature review, baseline assessment, PPD and focus group discussions. The task was then to identify which belonged to the NSTF Goals allocated to the group, recognizing that some bubbles belonged in more than one.

Once the initial grouping was completed, teams reviewed the Goals worked on by others, and compared the allocations to the list of recommended actions for national actors (rather than for regional actors or development partners), as listed in PSTPF. This helped generate further ideas and adjustments.

Figure 11. Grouping emerging priorities and actions to NSTF Goals





Session 3: Identifying strategic priorities and implementation priorities

With consensus on the allocations (including some overlaps across Goals), teams then sorted the bubbles for each Goal into those to be incorporated into the Framework as strategic priorities, and those to be incorporated into the accompanying 3-year Action Plan as implementation priorities.

Figure 12. Identifying strategic and implementation priorities exercise

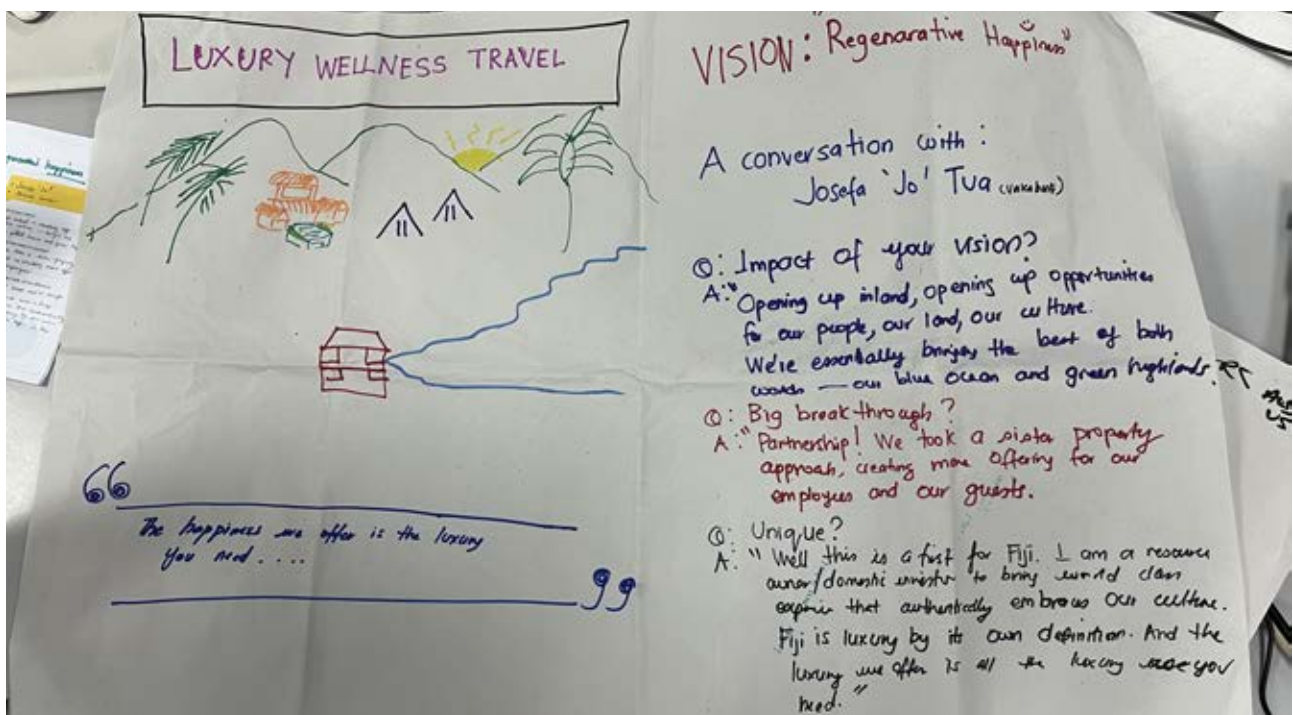


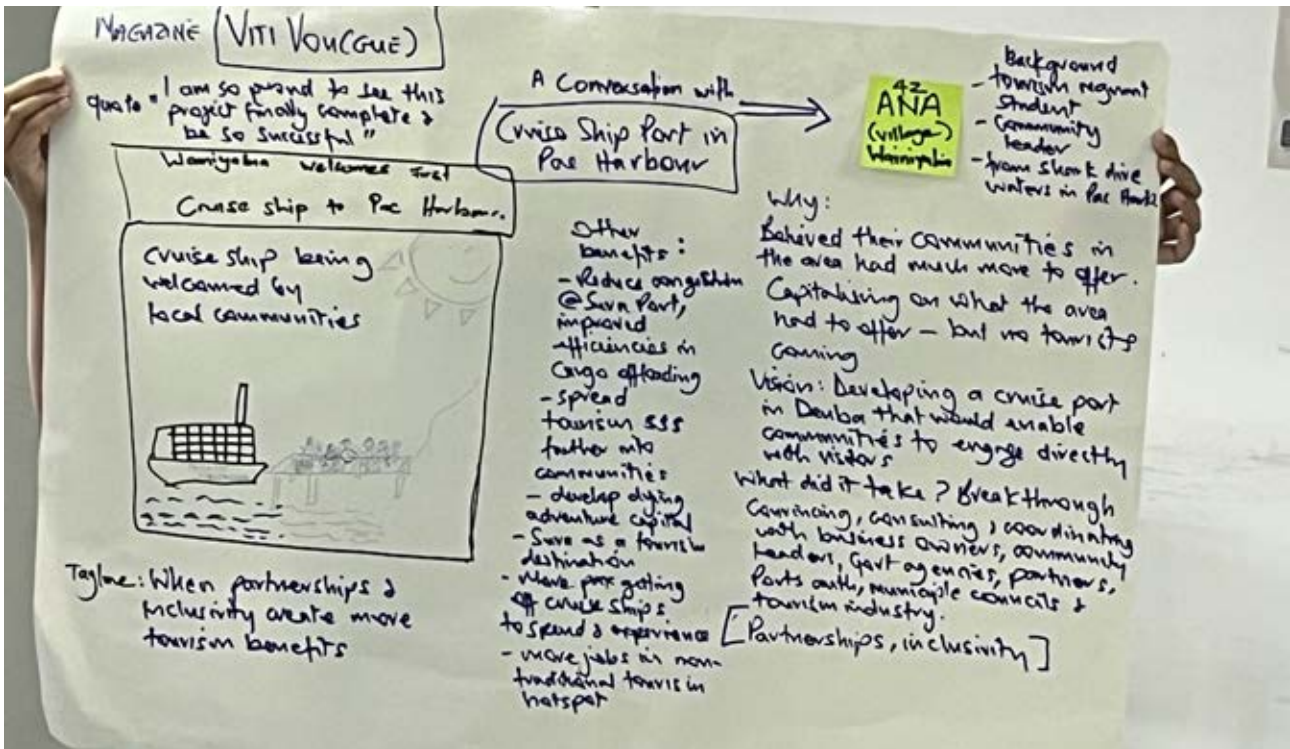
Session 4: Future visioning

To test whether the identified actions and priorities could lead to a future tourism sector aligned with the sustainable vision desired, each team worked to draw and tell a story, as a magazine cover and stakeholder interview/article, anticipating a single tourism scenario that exemplified the type of tourism the team wanted to see by 2034 (Figure 13. below). This included providing insights into the breakthrough moments that enabled their imaginary stakeholder’s dreams to be realized.

Participants reflected on their visions for tourism in 2034 and discussed whether there were any factors or key barriers that might not have been captured in the actions discussed. Issues that emerged included political will, political stability, infrastructure to support tourism growth and a stable tax and investment climate.

Figure 13. Future visioning activity and outputs





Session 5: Final validation

The in-room participants were split into two groups, with each group focusing on two Goals and placing red stickers against the actions deemed of highest priority (by the individual participant) for the Framework and, separately, the Action Plan (six stickers total). The two groups then swapped and repeated the exercise of placement and prioritisation using green stickers for the other two Goals (Figure 14. below). From this process, the group was able to agree the overall highest priority areas to inform the final Framework and Action Plan design across all four Goals.

The final allocations and priorities were then captured in **Table 4. Priorities for Framework** and **Table 5. Priorities for Action Plan** below. The highest priorities are placed in bold at the top of each table.

Figure 14. Sample outputs of mapping and prioritisation exercise





Table 4. Priorities for Framework

1. Prosperous Economies	2. Thriving and Inclusive Communities	3. Visible and Valued Cultures	4. Healthy Islands and Oceans
Tourism supports prosperous and resilient economies	Tourism supports the empowerment and wellbeing of our communities	Tourism amplifies and promotes our culture and heritage	Tourism accelerates climate action, protects our ecosystem and supports resilience
Maintain a stable investment climate and predictable tax regime	Improve ease of doing business	Development of cultural tourism policy	Increased attention to waste management and recycling
Improve ease of doing business	Increase experiential tourism offerings	Support indigenous equity, consortia, joint ventures	Increased climate and disaster risks
Increase coordination and analytical capacity at MTCA	Support empowerment of women and inclusion of people with disabilities	Improve collaboration and data sharing across enabling entities	Financing instruments targeting sustainability
Streamline approval processes	Experience development and dispersal	Increase attention and representation of culture and stewardship	Resilience
Identify niche segments	Develop immersive experiences	Improve monitoring of social and cultural impacts	Introduction of threshold for hotel licensing requirements
Improve policy and regulatory coherence		Strengthen knowledge management and inter-agency coordination	Partner with regulatory agencies and use standards development to drive improvements
Improve data coordination within government and with the private sector		Improve monitoring or social and cultural aspects	Prioritise sustainability measures
Political will and stability		Recognise Fiji's diverse cultures	Recognise the environmental and social costs of high volume
Cruise infrastructure		Community and iTaukei-led tourism	Carbon neutral transport systems
Improving information and guidance for tourism businesses		Identification of sustainable public-private partnerships	Developing infrastructure for cruise tourism
Improving the culture within policy and regulatory agencies			



Table 5. Priorities for Action Plan

1. Prosperous Economies	2. Thriving and Inclusive Communities	3. Visible and Valued Cultures	4. Healthy Islands and Oceans
Tourism supports prosperous and resilient economies	Tourism supports the empowerment and wellbeing of our communities	Tourism amplifies and promotes our culture and heritage	Tourism accelerates climate action, protects our ecosystem and supports resilience
Strengthen coordination and collaboration	Identify people in communities to access training	Recognise traditional dance/music	Improving connections and partnerships between conservation organisations and tourism operators
Improve employment conditions, career pathways and professional development	Improve monitoring of cultural and social impacts	Revive traditional building skills, weaving	Improving policy and regulatory coherence
Ensure minimal additional burdens and harmonise regulation	Need to focus on trade certification and practical skills rather than only academic qualifications	Increase experiential offerings	Environmental Impact Assessments process currently focused on "do no harm" rather than "do good"
Adapt Pacific Sustainable Tourism Standards (PSTS) standards for Destination and Industry to Fiji context	Adapt Pacific Sustainable Tourism Standards (PSTS) standards for Destination and Industry to Fiji context	Adapt Pacific Sustainable Tourism Standards (PSTS) standards for Destination and Industry to Fiji context	Adapt Pacific Sustainable Tourism Standards (PSTS) standards for Destination and Industry to Fiji context
Identify niche growth segments using tourism to diversify to other sectors and increase experiential tourism offerings	Support for strengthening digital accessibility	Support iTaukei entrepreneurship - share, train, connect	Incorporate climate and disaster risk into relevant guidelines
Target high-value visitors and properties, identifying sources of higher visitor spend (higher costs vs. higher margins) to yield higher aggregate revenue	Conduct a host perception survey	Support women to return to the labour force	Identifying public-private partnership opportunities
Introduction of threshold for hotel licensing requirements streamline hotel and liquor licensing and other relevant compliance	Expand corporate training and management programmes	Improve monitoring of social and cultural impacts	Promoting wellbeing through high-value, low-impact tourism

1. Prosperous Economies	2. Thriving and Inclusive Communities	3. Visible and Valued Cultures	4. Healthy Islands and Oceans
Outsource support for product and experience development to business advisers	Indigenous participation, equitable returns, equity, consortia	Food tourism promotion and development	Increased attention within industry on sustainability issues
Be strategic about film production: incorporate product and experience development and ensure assets are useful post-production	Increasing interest in ownership among LOUs	Increasing interest from LOUs for joint ventures rather than just leasing land	Increased penetration of renewable energy (solar)
Identify incubator and accelerator programmes to partner with	Community and iTaukei-led tourism	Guide training	Increased attention to waste management and recycling
Wellness and self-care		Reorientate skills around frontline hospitality	Financing instruments targeting sustainability
Sustainability increasingly important		Conduct an informal economy study	Multinational headquarters driving improved corporate sustainability policies
Promote dispersal and alternative markets – yachts, remote workers, short term rentals		Authentic Fiji	Institutionalise mechanisms from previous crises e.g. Tourism Recovery Team
Increase experiential tourism offerings		Wellness and selfcare	Examine insurance options
Formalisation and quality artists, dancers, SME operators		Art, music	Reduce tourism impact on natural capital
Conduct an informal economy study		Roll out of code of conduct	Engaging visitors in sustainability measures
Conduct a leakage study		Food and service standards	Prioritise sustainability measures
Non-hotel hospitality training needed		Conduct host perceptions survey	Reducing carbon emissions
Outsource skills development		Identify niche segments	Responsible stewardship of biodiversity, marine and terrestrial resources

1. Prosperous Economies	2. Thriving and Inclusive Communities	3. Visible and Valued Cultures	4. Healthy Islands and Oceans
Improve accessibility to training levy		Be strategic about film productions: incorporate asset and experience development and post-production use	Incorporating stewardship and indigenous principles and values
Increase in in-house formal training		Strong foundation: environment, social, cultural assets	Maintain stable investment climate and predictable tax regime
Reorientate towards hospitality and vocational skills		Improve culture within regulatory agencies	Increasing climate and disaster risk
Review immigration policy			Improving coordination across government ministries and strengthening collaboration
Review investment incentives			MSMEs unable to access industry-led training and expertise
Formalise Airbnb and other short term rental accommodation			
Improve information and guidance for tourism businesses			
Improve relationships and data sharing with key ministries (FRCS, FHTA, RBF, FBoS, MTCA, TF)			
Institutionalise mechanisms from previous crises e.g. Tourism Recovery Team			
Most current indicators measure economic stats only			
Awareness and customer training for frontline agency staff			



- 7 -

CONCLUSION & NEXT STEPS



7. CONCLUSION & NEXT STEPS

Phase A of National Sustainable Tourism Framework development, which concluded in June 2023, resulted in a series of recommended and prioritised actions for both the overarching Framework and an accompanying Action Plan. The process included contributions from across government, industry, and civil society.

Phase B, commencing in August, will include the drafting of the framework itself and socialisation of the draft framework with a wider group of stakeholders across government, including provincial and local government, the private sector, non-tourism businesses and associations, civil society groups, faith-based organisations, and the public.

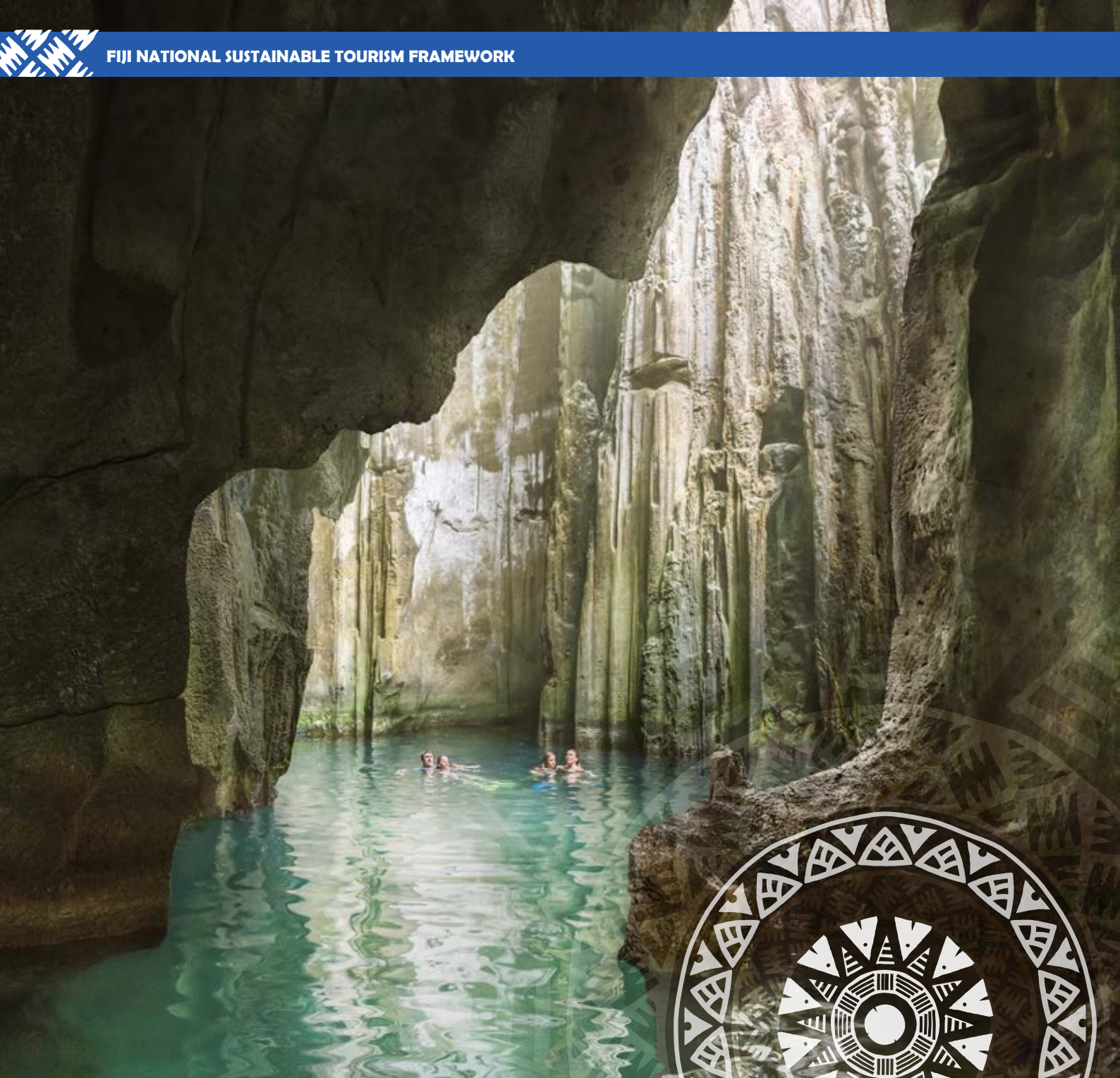
Table 4. Priorities for Framework and **Table 5. Priorities for Action Plan** are high-level syntheses of the findings and priorities identified from the consultations and research, and allocation of same against the Framework and Action Plan. They are presented here in a rough form only, as indicative of the process and thinking at the end of Phase A. They will be further refined and used to build out the full Framework and Action Plan under Phase B of the NSTF development (August-December 2023). The draft Framework and Action Plan will be further consulted before finalization in Phase B.

Tourism development is critical to the future of Fiji, given its importance to the economy, society, and its potential to have positive as well as negative impacts on the environment and socio-culture wellbeing. The sector has wide-reaching implications and links to other economic sectors such as agriculture, fisheries, creative arts, construction, transport and more. Numerous government agencies have a regulatory role in its management. It is also critical to the way that members of society think and feel about their country. The 'Bula Spirit', widely used to market the sector, relies on the friendliness of the Fijian people and in turn depends on how ordinary Fijians feel about the industry. As such, it is critical that consultations on the framework reach a wider audience than those directly involved in the sector.

Phase B will ensure that stakeholders beyond those directly involved in the tourism sector will have an opportunity to provide inputs and recommendations to ensure the framework is genuinely owned by all Fijians.

Adjustments will be made to the framework based on feedback received through this process.

The National Sustainable Tourism Framework is intended to be launched at the Tourism Convention scheduled for November 2023.



ANNEXES

ANNEXES

Annex 1 – Stakeholder consultations

Panelists for Public-Private Dialogues

Date	PPD title	Speakers
31 August	Overview: The Here and Now	MCTTT - Mr Shaheen Ali (PS) Tourism Fiji - Mr Brent Hill (CEO) Fiji Airways - Mr Andre Viljoen Fiji Hotel and Tourism Association - Ms Fantasha Lockington Duavata Sustainable Collective - Mr Richard Markham
18 November	Walking the Talk - Private Sector Sustainability Initiatives	SPTO – Ms Christina Gale Marriott Group - Mr Neeraj Chadha Barefoot Manta (Mamanuca Is) - Mr Rob McFarlane and Ms Isabella Sorovakatini NatureFiji-MareqetiViti - Ms Nunia Moko Nanuku Resort (Pacific Harbour) - Ms Kelly-Dawn Bentley and Mr Logan Miller
23 November	Inclusivity in Tourism	International Finance Corporation - Ms Ellen Maynes and Ms Liliwaimanu Vuiyasawa Pacific Private Sector Development Initiative (PSDI) - Ms Madeline Lucas Fiji Airways - Ms Anna Morris Raffe Hotels & Resorts - Mr Altaab Khan Fiji Hotel and Tourism Association - Ms Fantasha Lockington and Ms Litia Mario Tourism Fiji - Ms Sunishma Singh
24 November	Embedding Resilience in Future Tourism Planning	Massey University - Mr Apisalome Movono Takalana Bay Resort – Mr Josefa Bau Rivers Fiji – Mr Kasi Taukeinikoro University of the South Pacific, STHM – Ms Dawn Gibson Namosi Eco Retreat – Mr Danny Jason Fiji Hotel and Tourism Association – Ms Fantasha Lockington Ministry of Commerce, Trade, Tourism and Transport - Ms Jacinta Lal Regenerative Vanua (Vanuatu) - Ms Votausi McKenzie
20 January	MSMEs: Financial Challenges and Solutions	MSME Fiji (MCTTT) - Mr Iosefo Koroidimuri Society of Fiji Travel Associates (SOFTA) - Ms Beatrice Nast Mastercard - Mr Craig Kirkland FinTech - Ms Mereia Volavola Fiji Revenue Customs Service (FRCS) - Mr Mark Dixon MSME - My Desk Fiji - Ms Dipti Sharma
25 January	Development Goals and Public Infrastructure	Ministry of Infrastructure - Mr Taitusi Vakadravuyaca (PS) Fiji Roads Authority - Mr Kamal Prasad Investment Fiji – Ms Esther Salem Port Denarau Marina – Ms Cynthia Rasch Energy Fiji Limited – Mr Krishneel Prasad
1 February	Tourism as a Preferred Employer	Fiji Hotel and Tourism Association - Ms Fantasha Lockington USP School of Tourism and Hospitality Management - Mr Vikas Gupta Marriott International Fiji - Ms Farrah Shazleen Essence Group Fiji - Ms Debra Sadranu Intercontinental Fiji Golf Resort & Spa - Mr Alvin Prasad

Date	PPD title	Speakers
8 February	Greening the Tourism Industry	Global Green Growth Institute - Ms Katerina Syngellakis Shangri-La Yanuca Island, Fiji - Mr Francis Lee Construction Industry Council of Fiji and Fiji Architects Association - Mr Peter Rankin Castaway Island Resort - Mr Kolinio Vulaono International Finance Corporation - EDGE - Mr Angelo Tan
15 February	Strengthening Tourism Linkages	MSME Fiji - Mr Iosefo Koroidimuri Fiji Islands Dance Association/ VOU - Ms. Sachiko Soro Viti Association of Visual Artists - Ms Maria Rova Agritourism Working Group - Mr Savenaca Waqainabete Veikau Lodge (Naitasiri) - Ms Elenoa Nimacere
22 February	Product and Experience Development	SOFTA - Ms Beatrice Nast Tewaka Fiji - Mr James Sowane Tourism Fiji - Mr Leigh Howard Sigatoka River Safari - Mr Jay Whyte Nukubati Island Resort (Vanua Levu) - Ms Lara Bourke and Mr Leone Vokai
22 February	Growth of Airbnb in Fiji	Airbnb (Australia, NZ, Oceania) - Ms Katherine Cossyvas University of Queensland - Ms Renuka Mahadevan Amo & Tabua's Village Experience (Taveuni) - Ms Amoreena Mitchell Mana B & B - Ms Mue Bentley-Fisher Colonial Lodge (Levuka) - Ms Suzie Yee Shaw
15 March	Cruise Ship Market	Tourism Fiji - Mr Leigh Howard Transat Shipping - Mr Leone Naivalu Teki Tours - Mr Samu Matakibau Nautilus Tours (Port Denarau) - Ms Lewa Nicolaus Sawani EcoTours (Naitasiri) - Ms Ilisapeci Tavaga Natusara Tourism (Dravuni Is, Kadavu) - Mr Roy Ravana
22 March	Future Opportunities for Tourism Entrepreneurs	Haya Development - Mr Josua Mateiwai The Coffee Hub - Mr Shakil Zoro Domoika Adventures - Ms Matelita Katamotu Micks Fiji Tours & Transfers - Mr Sitiveni Nawaqa



Entities participating in Focus Group Discussions

Bula Coffee	Ministry of Rural & Maritime Development
Department of Cooperatives	My Fiji Store / Bulaccino
Department of Lands	Namosi Eco Retreat
Domoika Adventures	National Trust of Fiji
Duavata Sustainable Collective	Natural Blends
Fiji Airways	Nature Fiji Maraqueti Viti
Fiji Bureau of Statistics	Pacific Agribusiness Project
Fiji Development Bank	Pacific Private Sector Development Initiative
Fiji Hotel & Tourism Association	Pacific Tourism Organisation
Fiji Revenue & Customs Services	PhD Candidate
Fijian Holdings Limited	Researcher
Ginger Lei	Reserve Bank of Fiji
Global Green Growth Institute	South Sea Orchids
Griffith University	Suncoast Tourism Association
Independent Consultant / FARMily Gardens	Tourism Fiji
International Finance Corporation	United Nations Resident Coordinators Office
International Union for Conservation of Nature	Uto-ni-Yalo
Investment Fiji	Vanua Chocolate
iTaukei Affairs Board	Vees Farm
iTaukei Land Trust Board	Veikau Lodge
iTaukei Trust Fund	Vuadomo Village & Waterfall
Market Development Facility	Waitika Farm
Ministry of Forestry	World Conservation Society
Ministry of iTaukei Affairs, Heritage and Culture	Yasawa Tourism Marketing Cooperative

Annex 2 – Summary of key messages from PPD and Focus Group Discussions

Key messages and recommendations are inputs from participants during the session and should not be interpreted as the views of, nor endorsement by, MTCA or IFC.

Overview: The Here and Now

PPD details and panellists	PPD question and key messages	Recommendations
31.08.22 <ul style="list-style-type: none"> • MTCA • Tourism Fiji • Fiji Airways • Fiji Hotel and Tourism Association • Duavata Sustainable Collective 	<p><i>“With the re-opening of borders, what is present and what needs addressing now? Looking at travel trends, route and new destinations and marketing opportunities?”</i></p> <p>Partnership and cooperation approach (public and private sector): combining resources towards the development of the NSTF is crucial for achievement of short- to long-term goals.</p>	<p>Partnerships and cooperation</p> <p>The NSTF needs to have ownership from across a wide range of stakeholders. This requires in-depth consultations within the government and with private sector partners. There are numerous ways of doing this:</p> <ul style="list-style-type: none"> • Establish a steering committee for provision of whole-of-government advice on how to shift tourism to a more sustainable trajectory. • Organise a high-level demonstration of commitment from government and private sector. • Organise an impactful media campaign to support the NSTF review process. • MTCA to formalise partnership with MRMDDM and visit each Divisional Commissioner to hold tourism planning meetings.
<p>Participants</p> <p>M - 18 W - 29 Total: 47</p>	<p>We need better data and be on top of the trends.</p> <p>Doing business environment reforms needed: change the one-size-fits-all approach.</p>	<p>Data and information</p> <ul style="list-style-type: none"> • Developing a solid evidence base for tourism is critical. Various data sources are currently being used (STR for hotel occupancy, Fiji Airways forward-looking sales, FBoS for visitor arrivals, tourism earnings, IVS for visitor spend and visitor characteristics and in-country trends). • Recruit statistical/analyst capacity within MTCA to ensure relevant information is consolidated and made available to users in a timely way. • Invite FBoS to the Tourism Statistics Taskforce. • Ensure regular meetings between interested stakeholders (MTCA, RBF, FRCS, FBoS, Tourism Fiji, Ministry of Finance) to share information and harmonise key statistics.
	<p>MSME is a potential growth area of the industry.</p>	<p>MSMEs</p> <p>MSMEs consistently raise the need to reform various business requirements.</p> <ul style="list-style-type: none"> • Continue to accelerate business reforms, including streamlining licencing processes. • Consider outsourcing private sector advisory roles to tourism MSMEs through partnerships with existing business development service providers.

PPD details and panellists	PPD question and key messages	Recommendations
	<p>Equitable spreading of tourism dollars to communities.</p> <p>Making the industry more inclusive and building grassroots communities requires serious investment and innovative partnerships to build business skills to elevate participation in this competitive market.</p>	<p>Equitable value chains</p> <ul style="list-style-type: none"> • MTCA to work with institutions supporting communities to grow tourism businesses (e.g. Ministry of iTaukei Affairs, iTaukei Trust Fund Board, TLTB). • Grow awareness of different business and partnership options for communities in the tourism industry based on existing models.
	<p>The basics of supporting the industry to reinforce sustainable ideals, such as waste management, is missing. Work with the local government.</p> <p>Fiji Airways, Fiji's national airline, plays a critical role in the industry and attracting growing markets such as the mid-market Americans – who are high value traffic.</p> <p>Supply chain disruptions, cost of fuel and imports, skills shortage – these are perhaps some of the most immediate concerns.</p>	<p>Infrastructure</p> <ul style="list-style-type: none"> • Work with infrastructure providers (WAF, EFL, municipal councils) to identify and improve infrastructure to support sustainability (renewable energy, waste management and recycling). • Contribute to the National Infrastructure Investment Plan to ensure these issues are reflected in this planning process.

Walking the Talk - Private Sector Sustainability Initiatives

PPD details and panellists	PPD question and key messages	Recommendations
<p>18.11.22</p> <ul style="list-style-type: none"> • Marriott Group • Barefoot Manta • Nature Fiji- MareqetiViti • Nanuku Resort • SPTO <p>Participants M - 19 W - 36 Total = 55</p>	<p><i>“How can the tourism industry meet emerging challenges related to the environmental and social pillars of sustainability and what further support is needed?”</i></p> <p>Support strategic capital investments, local partnerships and raising internal awareness.</p> <p>Value healthy oceans and marine life beyond being tourism attractions alone. This includes the importance to livelihoods that depend on them, the scientific approach to conservation and the impacts that human behaviour can have on ecology and patterns.</p> <p>Impactful industry sustainability initiatives with strong partnerships and local community engagement to enhance guest experiences are evident.</p> <p>Conservation groups play a fundamental role in the tourism industry in valuing the importance of Fijian history as well as protecting and conserving cultural assets. Understanding ecological perspectives, extinct and introduced/naturalised species, loss of biodiversity (forests) is key to understanding tourism development and planning.</p> <p>National sustainable tourism standards and policies to guide the tourism industry are needed. The SPTO’s Pacific Sustainable Tourism Standards developing a regional framework that is a great model to work off.</p>	<p>The private sector plays a key role in shaping the future of Fiji’s tourism sector. Identify in-country expertise and suppliers relevant to accelerating sustainability measures (water conservation, green buildings, energy audits) and work with tourism operators to raise awareness of financing instruments and models that can support adoption.</p> <p>Raise awareness of the value of healthy oceans and marine resources for tourism and communities that depend on them.</p> <p>Promote sustainability initiatives that highlight best practice and community engagement through Tourism Fiji and other channels.</p> <p>Adapt the Pacific Organisation’s regional standards to develop Fijian sustainability standards to support adoption of best practice measures.</p> <p>Connect conservation organisations that are largely Suva-based with tourism operators to identify strategic partnerships, particular in key biodiversity areas.</p>

Inclusivity in Tourism

PPD details and panellists	PPD question and key messages	Recommendations
<p>23.11.22</p> <ul style="list-style-type: none"> International Finance Corporation Pacific Private Sector Development Initiative Fiji Airways Raffe Hotels & Resorts Fiji Hotel and Tourism Association Tourism Fiji <p>Participants M - 14 W - 35 Total = 49</p>	<p><i>“How can we make tourism more inclusive, encourage women in leadership and address social barriers?”</i></p> <p>Hear good practice from businesses and HR leaders that have implemented policies and practices to address current barriers and strengthen inclusion and leadership.</p> <p>Are there any gaps in available training and mentoring and how should programmes be supplemented?</p> <p>As women conduct more than 85 percent of global purchasing decisions, there is a need to cater to this market and their needs.</p> <p>Leadership matters. Need to provide the right environment and policies to support women in leadership.</p> <p>The need for flexible work policies, anti-harassment and empowerment.</p> <p>Though women are under-represented in the sector, there are pockets of growth.</p> <p>There is a need to determine how to make training and resources available for smaller businesses.</p> <p>Are guidelines available for employers to deal with cultural sensitivities: women employees in positions of authority, conflict with local village customs where women are not supported in these areas. Choosing the right facilitators for these conversations is critical.</p>	<p>Support industry associations to develop mentoring programmes that support women’s leadership within the tourism industry.</p> <p>Identify peer-to-peer partnerships between SMEs and larger operators to facilitate mentoring opportunities across the sector.</p> <p>Support operators to institutionalise inclusive human resources policies and practices, including flexible work, anti-harassment and anti-domestic violence.</p> <p>MTCA and Ministry of iTaukei Affairs to develop guidance for employers on how to manage cultural sensitivities and differential power. Identify facilitators who can facilitate uncomfortable conversations.</p>

Embedding Resilience in Future Tourism Planning

PPD details and panellists	PPD question and key messages	Recommendations
<p>24.11.22</p> <ul style="list-style-type: none"> • Namosi Eco Retreat • Fiji Hotel Tourism Association • Massey University • Rivers Fiji • University of the South Pacific • Nukubati • MTCA <p>(no participant record as event managed by Massey University)</p>	<p><i>“How do stakeholders respond to a crisis, especially multiple or different types of shocks than disasters? What worked, how can these measures be put in place? When the next shock happens, what do we need to do?”</i></p> <p>Despite immense financial hardships, people were turning to various adaptation methods to thrive.</p> <p>Various adaptation methods include adapting through entrepreneurial activities, utilising the land and sea, bartering, communal gifting and solesolevaki.</p> <p>Fijian customs and values embed a relationship with nature. Sometimes economic activity, tourism in particular, can drive a wedge in between people and nature. The pandemic gave people in the Pacific and Fiji a chance to rekindle this relationship.</p> <p>Future aspirations: What do you want from tourism? People want to be valued; they want more locally owned businesses. Fijian chief quote: “Tourism must complement our way of life, not take over it”.</p> <p>Massey University’s Tourism Resilience Framework includes five aspects of well-being important to Pacific people: social, spiritual, financial, physical and mental.</p> <p>Fijians are migrating with financial well-being a primary driver. Financial well-being is relative. If people and their services are valued, they should be retained. Mental well-being must be a big part of what defines regenerative tourism. A people-based approach should be defined.</p> <p>Importance of indigenous knowledge, the role that tourism can play in leveraging this and contributing to its conservation. Tourism can be a tool for cultural conservation – but there is a need for a holistic approach, of diversity of stakeholders and listening to perspectives.</p> <p>Facilitating cultural technologies. Academic circles need to make information accessible to those at government levels. In Japan there is a system regulating traditional structures (traditional to modern-day structures and legislations). This can be replicated to the localized Fijian experience.</p> <p>Public-private partnerships can work, if the public sector can consult with the private sector to optimise tourism.</p> <p>Complexities attached to different scales: what types of operations, locations and shocks mean to different operators.</p> <p>Tourism is part of an interconnected, integrated, interrelated system that draws on the strength of all stakeholders.</p> <p>There is a need to understand that resilience building is a journey. It is a continuous journey of improvement, understanding, embracing new knowledge, impacting new regimes and looking to the horizon.</p>	<p>Establish a stakeholder resilience group.</p> <p>Map out other partners and collaborators connected to tourism and empower ownership.</p> <p>MTCA and MSME Fiji to develop a system for small business’ recoveries.</p> <p>Financial support, in the form of funding set aside for small operators to live on, should be available pre- and post-shocks.</p> <p>Support strata title type of development: this is the approach that FHATA supports for investment in tourism.</p> <p>MTCA needs to look at decentralizing tourism staff to other areas of Fiji, as all decisions are Suva-centric.</p> <p>MTCA needs to be adequately resourced to meet industry expectations and delivery.</p> <p>There needs to be a body or term of understanding: values and principles which tourism stakeholders can embrace.</p> <p>MTCA to connect with JICA and find out more about the system that Japan employs for reviving and regulating its maritime traditions, including use of traditional and modern-day boating structures and navigation.</p>



SMEs and Regulatory Compliance, Financial Challenges And Solutions

PPD details and panellists	PPD question and key messages	Recommendations
20.01.23 <ul style="list-style-type: none"> MSME Fiji (MTCS ME) Society of Fiji Travel Associates (SOFTA) Mastercard FinTech Fiji Revenue Customs Service (FRCS) MSME - My Desk Fiji Participants M - 23 W - 31 Total = 54	<p><i>“What are the regulatory and financial barriers to SME development?”</i></p> <p>A single national definition for (M) SMEs is needed for alignment with government agencies, banks, and development partners.</p> <p>What can be done to reduce the impact of shocks on MSMEs so they can bounce back/build forward better and faster?</p> <p>The Short Life Investment Package is now more accessible. Taxation reforms such as the reduction in tourism related taxes and introduction of incentives for hiring local artists, dancers, musicians, and crafts have been facilitated.</p> <p>E-commerce and digitalising services can be challenging.</p> <p>Upcoming projects with Mastercard and digital financing and savings apps such as SOLE to assist MSMEs will support e-commerce and financial solutions.</p>	<p>Develop a national definition for MSMEs. Support MSMEs to build contingency funds to access in times of need.</p> <p>Strengthen links between industries to share knowledge and learning.</p> <p>Assess the impact of tax reforms and incentives on tourism investments post-pandemic.</p> <p>Increase the SLIP threshold to pre-pandemic rates.</p> <p>Connect MSMEs with e-commerce and financing solution providers and create an enabling environment.</p>

Development Goals and Public Infrastructure

PPD details and panellists	PPD question and key messages	Recommendations
25.01.23 <ul style="list-style-type: none"> Ministry of Public Works Fiji Roads Authority Investment Fiji Port Denarau Marina Energy Fiji Limited Participants M - 14 W - 19 Total = 33	<p><i>“Which critical infrastructure underpins tourism development and are there good examples of public-private infrastructure development?”</i></p> <p>The Sustainable Sea Transport Initiative is testing alternative maritime transport options.</p> <p>There remains a need to invest in critical infrastructure and essential services such as solid waste management, ITC.</p> <p>Roads, as well as other market access means to facilitate market access. These facilitate new market opportunities such as adventure travel that also benefits communities.</p>	<p>MTCA to work with relevant government agencies to strengthen waste management options across the country.</p> <p>Develop screening templates for rural access roads to ensure investments are coherent and include considerations of waste management options.</p> <p>Invest in public ITC infrastructure as a foundational requirement for burgeoning tourism sectors, including remote and blended working.</p> <p>Pilot sustainable sea transport options building on the existing Sustainable Sea Transport initiative.</p> <p>Assess the feasibility of transporting containerised freight to Labasa.</p>

Tourism as a Preferred Employer

PPD details and panellists	PPD question and key messages	Recommendations
<p>01.04.23</p> <ul style="list-style-type: none"> Fiji Hotel and Tourism Association University of the South Pacific- School of Tourism and Hospitality Management Marriott International Fiji Essence Group Fiji Intercontinental Fiji Golf Resort & Spa <p>Participants M - 13 W - 29 Total = 32</p>	<p><i>“Can the tourism sector meet the emerging employment and skilled labour challenges and what further action and support is needed?”</i></p> <p>The tourism industry is losing skilled workers as fast as it is training them.</p> <p>Legitimate labour mobility recruiters asked if Fiji Immigration has been involved with reported unregistered overseas recruiters, to have them blacklisted from future travel to Fiji?</p> <p>The Fiji tourism industry is shouldering the cost of training in Fiji for the Australia and New Zealand hotel industry.</p> <p>Limited availability of readily skilled or experienced talent to take on roles and kick-start immediately with no or little supervision.</p> <p>Global management companies such as Marriott Group and IHG partner with local Fiji universities for recruiting graduates and internships. They also have their own training academies.</p> <p>Industry MUST be willing to invest in these apprenticeships. Training institutions do not have the ability to do this alone.</p> <p>The need to explore drivers for winning/losing talent: on losing Fijian talent and gaining returning overseas based or born Fijians or with expat talent.</p> <p>Loss of former tourism employees moving to other industries (BPO sector) that provides fair work and better work security. Some have opted to do farming or fishing; some opted to stay or work from home.</p> <p>Options for tourism to stay competitive and encourage growth and staff retention:</p> <ul style="list-style-type: none"> Understand employee retention rates and have a data-driven employee retention strategy, check data to understand trends that can be used to improve employee retention, a healthy work environment, rewards and recognition, flexibility, work for growth and development, healthy relationship with the manager and competitive compensation. Challenges faced in maintaining and regaining students. Perception of an unstable tourism and hospitality job market. Strengthen links between tourism and hospitality educational institutions. There is a need to align courses and qualifications with current industry needs. Access to finance needs to a greater scope with other funding/loan/grant systems. Partnerships with bilateral institutions such as in Australia and New Zealand for higher level training skills. 	<p>Support the development and institutionalisation of industry-led training, hospitality courses and apprenticeships.</p> <p>Streamline the Immigration process to allow for short term employment to meet urgent gaps.</p> <p>Examine the impact of potential partnerships with development agencies to co-finance training programmes.</p> <p>Support industry-led training academies to expand and professionalise.</p> <p>Examine different strategic options for employee retention and support the industry with advice.</p> <p>Foster a culture of sharing information and skills.</p> <p>Develop financing options for vocational training. Develop other funding/loan/grant systems and partnerships with recognised institutions for higher level training skills.</p>

Greening the Tourism Industry

PPD details and panellists	PPD question and key messages	Recommendations
<p>08.04.23</p> <ul style="list-style-type: none"> Global Green Growth Institute (GGGI) Shangri-La Yanuca Island, Fiji Construction Industry Council of Fiji and Fiji Architects Association Castaway Island Resort International Finance Corporation - EDGE <p>Participants M - 14 W -25 Total = 39</p>	<p><i>“What critical greening approaches underpin tourism development? Are there good examples of public-private greening development?”</i></p> <p>There are good examples from the industry on sustainable purchasing policies or supplier partnerships, such as Six Senses’ no plastic in deliveries policy. Required policies to be implemented as part of compliance under green certification.</p> <p>Many businesses have adopted some level of green certification like Green Seal (Outrigger and Castaway). Barriers exist on policy regulations, costs and supply required for green certification.</p> <p>Waste management impacts from tourism: litter, F&B and housekeeping packaging and supplies. This needs to take the front seat in management in terms of sustainability. Waste management also requires the right infrastructure.</p> <p>Action is being taken by large and small operators.</p> <p>Absence of standards means complexity in monitoring. The significant increase in solar uptake and implementation over the last five years is just one example.</p> <p>Policy/regulation is needed. Industry appetite is there for sustainability design solutions, despite cost concerns.</p> <p>Incentives, combined with measurement and enforcement of existing and new sustainability standards can accelerate implementation. Lack of information within the industry about sustainability practices and funding opportunities.</p> <p>Opportunity to learn from other Pacific Island Countries: New Caledonia has taken an approach not as ‘Sustainable Tourism’, but a ‘Sustainable Destination’, therefore the focus is broader.</p> <p>Greenwashing threats are real, and businesses of varying scale need to be resourced.</p> <p>Acknowledging that communities are ultimately the driving force behind any conservation initiative, and the Vanua is connected, bose ni yasana, bose ni tikina, bose va koro, the session explored examples of revenue sharing and financing pathways for conservation in tourism.</p> <p>Key topics discussed: waste management, purchasing policy, social and cultural impacts, energy/ policy use, building codes and actions taken by industry (small and large operators).</p>	<p>Promote industry awareness of good practice sustainability measures including sustainable procurement policies.</p> <p>Elevate the importance of waste management to address priority investments.</p> <p>Develop standards to support tracking sustainability progress and accelerate adoption of best practices.</p> <p>Improve information available to support best practice waste management, for example by developing supplier lists of green investment providers.</p> <p>Fiji to pursue Sustainable Destination GSTC certification.</p> <p>Document case studies of revenue sharing and financing pathways for conservation tourism.</p> <p>Allow a proportion of tax revenue levied on the tourism sector. ECAL to be accessed by conservation organisations and tourism operators to support development of conservation tourism-focused social enterprises.</p> <p>Connect social enterprises with available sources of finance and investment.</p> <p>Expand the use of credit guarantee loans to finance renewable energy and other green investments.</p>

Strengthening Tourism Linkages

PPD details and panellists	PPD question and key messages	Recommendations
<p>15.04.23</p> <ul style="list-style-type: none"> MSME Fiji Fiji Islands Dance Association/VOU Dance Viti Association of Visual Artists Agritourism Working Group Veikau Lodge <p>Participants M - 13 W - 30 Total = 43</p>	<p><i>“How can critical support industries meet challenges and opportunities to better inform future development in tourism? How can sectoral synergy strengthen socio-economic development.”</i></p> <p>There is a need to determine the key constraints and lessons learned from to better inform stronger sectoral linkages that strengthen value chains for future development.</p> <p>How can smaller flower farmers link up with FNU and USP in the west to train and employ students on floriculture?</p> <p>Smaller ecotourism providers in rural and maritime areas require better transport and access infrastructure, such as roads to Sabeto for tourists visiting experiences such as hot pools, zip lines and Sleeping Giant gardens.</p> <p>There is growing interest for community-based tourism, however, more dialogue is needed on the business and organisational models that works best at community and mataqali levels. Trusts and co-operatives are good examples of how community-based tourism is supported, however appropriate support is needed for community-based businesses where communal and individual LOUs and their members mutually benefit.</p> <p>Tax incentives such as the 300 percent tax rebate for tourism industry engaging local artists is a notable incentive. Some hotels are not aware of it.</p> <p>Third-party liability and indemnity insurance is not affordable for SMEs.</p> <p>Managing expectations and demands of different hotels and managers is challenging for MSMEs.</p> <p>Regarding authenticity and cultural appropriation, larger and established operators are more likely to take a more affirmative stand on types of performance and pricing and Fijian cultural performances versus high demand Pacific Island dances (fire and hula dances). Tourists shop for handicrafts and arts, but many leave Fiji without spending the money they set aside for gift shopping due to the lack of authentic Fiji products considered value for money.</p> <p>There is a disconnect between the arts and tourism industry. A wealth of local creative talent is not being developed to full potential.</p> <p>Doing business in the tourism industry almost always requires cross-cultural communication: training and mentoring support is needed.</p> <p>Prevailing attitudes that sourcing from overseas means better quality and/or cheaper.</p>	<p>Improve transport and infrastructure access to potential tourism sites, including sites close to Nadi and more remote mataqali-owned sites with large potential.</p> <p>Options of more flexible and accessible public liability coverage under the Accident Compensation Commission Fiji (ACCF), like schools and workplaces.</p> <p>Improve transparency across value chains particularly in relation to benchmarking pricing.</p> <p>Need a pricing structure that is fair to the artists.</p> <p>Evaluate past efforts to stimulate rural tourism and document various organisational models suited to community and mataqali-owned businesses.</p> <p>Support cross-cultural mentoring, coaching, and training for businesses, suppliers, and operators new to working in tourism.</p> <p>Work with arts associations to promote Fijian art and suppliers to hotels.</p>



Product and Experience Development

PPD details and panellists	PPD question and key messages	Recommendations
<p>22.02.23</p> <ul style="list-style-type: none"> • SOFTA • Tewaka • Tourism Fiji • Sigatoka River Safari • Nukubati Island Resort <p>Participants</p> <p>M - 15</p> <p>W - 29</p> <p>Total = 44</p>	<p><i>“Why is there not a more diversified experience market, what are the constraints and what lessons can be learned from past experiences with development?”</i></p> <p>There are numerous opportunities to diversify the industry: rural, sports and shopping tourism, for example Potential experience providers including community-based operators are not always familiar with tourism value chains and the number of intermediaries that form critical links to connect operators to markets.</p> <p>Nurture support for SMEs</p> <p>Transport operators need to increase quality and sustainability, but infrastructure for e-vehicles is required.</p> <p>Need for more adventure tourism, eco-tourism and improve the quality of existing attractions. New unique experiences are important for visitor returnees.</p> <p>More investment in marketing, infrastructure and services.</p> <p>Tourism Fiji is now embracing experiential tourism.</p> <p>Challenges include limited infrastructure in terms of transport and connectivity/seasonal fluctuations.</p> <p>Reliant on the natural environment</p> <p>Growing concern of tourism’s impact. Sustainable tourism practices must be implemented. Destination development team and introduction of sustainability criteria in line with GSTC.</p> <p>Limited resources to invest in product and experience development.</p> <p>Focus on MICE market: large groups coming to Fiji. Village experiences need to be optimised. Communities need to understand tourism value chains and the work needed to nurture and sustain relationships.</p> <p>CSR: Work collaboratively with the education sector.</p> <p>Connections to people is key. This keeps visitors returning.</p> <p>If trying to work with Vanua, traditional approvals should be sought first alongside discussions with relevant government officials. Relationships with partner communities are critical.</p> <ul style="list-style-type: none"> • Operators should remain conscious of the potential negative impacts of tourism on communities including the erosion of traditional knowledge and skills. One way to address this is to avoid circumstances in which communities solely rely on tourism: This ensures that agricultural and fishing knowledge and skills are retained, and tourism is useful additional income. • Nurture relationships and networks across the value chain. • Sponsor rugby teams, athletics: embrace people’s passion. • Focus on strengths and embrace points of difference. <p>Challenges include infrastructure (roads), connectivity / electricity, waste management and realising authentic experiences.</p>	<p>Develop tourism-focused incubation programmes that support SMEs, rural and community-based operators to acquire skills to develop tourism products and experiences.</p> <p>Provide ongoing mentoring, coaching, and training for SMEs from business development advisors.</p> <p>Tourism Fiji to provide greater support to SMEs to develop marketing materials and content, and continue to provide information, market intelligence and outreach to SMEs to provide visibility and support to market experiences.</p> <p>Support MTCA to develop standards to ensure sustainability measures are practiced across industry.</p> <p>Improve authenticity of village experiences by supporting aggregators, operators and communities to understand the value of tourism, the types of experiences they can provide.</p> <p>Strengthen relationships between MTCA, Tourism Fiji with iTaukei institutions to work with and through the Vanua to obtain support. Consider re-establishment of the Roko Tui Saravanua role.</p> <p>Focus on community tourism that minimises disruptions and is non-instructive.</p>

Growth of Airbnb in Fiji

PPD details and panellists	PPD question and key messages	Recommendations
<p>08.03.23</p> <ul style="list-style-type: none"> • Airbnb • University of Queensland • Amo & Tabua's Village Experience • Mana B & B • Colonial Lodge <p>Participants M - 29 W - 46 Total = 75</p>	<p><i>"What can be learnt from experiences of the likes of Airbnb hosts and destinations in the region as well as from general challenges and opportunities in the Airbnb market?"</i></p> <p>Tourism has important perspectives on the growth of Airbnb and relevance to future development.</p> <p>There is significant uncertainty and ambiguity amongst hosts, the tourism industry and government about Airbnb, compliance and applicability of legislation and regulation in Fiji.</p> <p>Issues of taxation, regulation and licensing of Airbnbs and where the responsibility lies.</p> <p>Consideration of public liability insurance coverage, safety and quality assurance for Airbnbs were highlighted and how monitoring and policing will be handled.</p> <p>The possibility of FRCS collaborating with Airbnb and other short-term rental platforms to ensure that hosts are complying with local tax regulations should be explored.</p> <p>Government to work together with Airbnb and other platforms. Take best practices from other destinations.</p> <p>Airbnb/STR hosts is to create an association or a 'group' under an existing association, so all hosts are kept abreast of relevant developments relating to hosting and other issues.</p> <p>Recommendation to government (from hosts) on regulations that may be developed for Airbnb, to consider these incorporated directly with Airbnb instead of via government agencies.</p> <p>There is an opportunity to promote short-term rentals in Fiji, connecting with experiences of local culture and keeping out of high tourism hubs/areas.</p>	<p>Establish a short-term rentals/Airbnb working group on Facebook, Viber or WhatsApp and an association.</p> <p>Airbnb to share experience of regulating short term rentals and compliance practices in Australia and similar locations/regions (Bali/Caribbean).</p>



Cruise Ship Market

PPD details and panellists	PPD question and key messages	Recommendations
<p>15.03.23</p> <ul style="list-style-type: none"> • Tourism Fiji • Transam Shipping • Teki Tours • Nautilus Tours • Sawani EcoTours • Natusara Tourism <p>Participants</p> <p>M - 25 W - 53 Total = 78</p>	<p><i>“What can we learn from experiences of local operators and stakeholders in the cruise ship market and what are the opportunities that exist and relevant to future development?”</i></p> <p>There is keen interest from small local tour operators to get more cruise business. Currently, these operators get their business from passengers who have not pre-booked with bigger operators.</p> <p>Small operators were encouraged to look at what value addition they can offer and points of difference in terms of selling tours and products. In particular, passengers were keen to look at handicrafts and cultural experiences.</p> <p>Smaller operators were also encouraged to connect with ATS and Teki tours to put together a programme and offer this to the cruise ship as a subcontractor or third party.</p> <p>Shipping agents, tour operators and destinations voiced the greater need for infrastructure development that is cruise-designated, such as cruise terminals, jetties, and pontoons (small island port of calls) and updating of hydrographic charts for Fiji waters for channelling and berthing sites.</p> <p>There is a need to determine if the government has plans to provide access to small tour operators to access affordable insurance coverage, premiums can be expensive for SMEs.</p> <p>Good examples of community-based tourism operators showing ongoing partnerships with major tour operators (Sawani EcoTours), cruise ship companies (Dravuni Island’s Natusara Tourism with Carnival Australia), shipping agents as well with government on duty concessions for spare parts (for jetties).</p>	<p>For product and experience development (see above).</p> <p>Improve infrastructure and develop cruise-specific infrastructure over the long term e.g. a cruise terminal.</p> <p>Investment Fiji and Tourism Fiji to explore partnerships to attract expedition cruise vessels to Fiji.</p> <p>MSAF to update and improve Fiji hydrographic maps and eCharts.</p> <p>Document examples of successful partnerships between cruise operators, aggregators and community experiences and the key success factors between community operators.</p> <p>Expedition cruise ships to be encouraged for tourism dispersal to less visited regions, without the environmental impact of larger cruise ships.</p>

Future Opportunities for Tourism Entrepreneurs

PPD details and panellists	PPD question and key messages	Recommendations
<p>22.03.23</p> <ul style="list-style-type: none"> Haya Development The Coffee Hub Domoika Adventures Micks Fiji Tours & Transfers <p>Participants</p> <p>M - 11 W - 20 Total = 31</p>	<p><i>“What can be learnt from insights and experiences of entrepreneurs and business opportunities available for the workforce and which lessons can be learnt from challenges and factors relevant for future development of tourism entrepreneurship?”</i></p> <p>The lack of affordable public liability insurance continues to be a barrier for small operators and is critical to supporting SMEs in the sector.</p> <p>Access to funding and options available to small operators is another hot topic, with the need for alternate funding mechanisms to be put in place.</p> <p>MSMEs need capacity building to get their businesses “investment ready”.</p> <p>The other issue to address is “fly-by-night” investors need vetting through Investment Fiji or a reputable private institution the same way MSMEs will be made to fit pre-reqs. A project currently being worked on by the Young Entrepreneurs Council and MSME Finance Working Group, under the NFIT with RBF, has potential. South Pacific Stock Exchange needs to be encouraged to start on-boarding MSMEs.</p> <p>The call to ensure tourism-focused laws and regulations are tailor-made to suit small tour operators, including resource owners, was also echoed.</p>	<p>Document examples of successful partnerships between smaller and larger tourism businesses.</p> <p>Work with insurers to find a suitable product for MSMEs.</p> <p>Support small businesses with a coaching and mentoring programme.</p> <p>Find a solution for SMEs to access affordable public liability insurance.</p>



Agritourism

FGD details	FGD question and key messages
<p>10.03.23</p> <ul style="list-style-type: none"> • Agritourism operators (8): • Bula Coffee • Ginger Lei • FARMily Gardens • My Fiji Store / Bulaccino • Natural Blends • Vees Farm • South Sea Orchids • Waitika Farm • Vanua Chocolate • Tourism Fiji • Pacific agribusiness project (PARDI) staff <p>Participants</p> <p>W - 7 M - 4 Total = 11</p>	<p><i>“How can agriculture and tourism work in synergy to create business opportunities and jobs”</i></p> <p>Current lease arrangements act as a barrier. Agricultural leases do not easily allow for farm tours without conversion to commercial or tourism leases. There is also a need to promote experiences on mataqali land.</p> <p>There is currently a one-size-fits-all approach to tourism, as farm stays are not hotels and should be treated differently.</p> <p>There is a need to improve access to infrastructure, such as farm roads and energy.</p> <p>The start-up process is challenging, and more advice and assistance should be available.</p> <p>Public liability insurance is often prohibitively expensive for small operators.</p> <p>Many MSMEs may not have sufficient knowledge on digital tools available to promote agritourism in Fiji. Quality content creation and the funds for this are needed.</p> <p>There is a need for smaller operators to be able to access finance, with the Fiji Development Bank to play a key role.</p>

Conservation and tourism

FGD details	FGD question and key messages
<p>15.03.23</p> <ul style="list-style-type: none"> • IUCN • School of Environment and Science, Griffith University • NatureFiji- MareqetiViti • Uto-ni-Yalo • GGGI • WCS • iTAB • Ministry of iTaukei Affairs • National Trust of Fiji • MTCA • Ministry of Forestry • IFC <p>Participants</p> <p>W - 8 M - 4 Total = 12</p>	<p><i>“How can conservation and tourism work in parallel to achieve common objectives”</i></p> <p>Differences in terminology are apparent for sustainable tourism, nature-based tourism, community-based tourism and conservation tourism.</p> <p>Dr Clare Morrison, Associate Lecturer at the School of Environment and Science, Griffith University, shared examples from around the region of how sustainable tourism has contributed to biodiversity positive outcomes.</p> <p>iTAB plays a critical role in supporting community development and conservation of traditional knowledge. Conservation should not just be restricted to the environment, for instance, reviving the art of sailing and boat building.</p> <p>There are currently gaps in terms of legislation and community-based business operators, such as community homestays. Sound advisory support is needed for communities to develop and own ecotourism businesses.</p> <p>Other big picture issues flagged include the need to shift the narrative, concerns about greenwashing, FHTA providing sessions for members, the role of standards, partnerships with the education sector to ensure children can access additional resources and the need for plastics reduction campaigns.</p>

Tourism investment

FGD details	FGD question and key messages	Recommendations
<p>17.03.23</p> <ul style="list-style-type: none"> • iTaukei Land Trust Board • iTaukei Trust Fund • Ministry of iTaukei Affairs • Department of Lands • Investment Fiji • MTCA • IFC <p>Participants</p> <p>W - 6 M - 5 Total = 11</p>	<p><i>“How has the tourism investment landscape evolved over the years? How can we encourage high value, low impact tourism that also allows for more local content?”</i></p> <p>Increased localisation of tourism investments.</p> <p>Investment Fiji’s role has shifted to general investment facilitation.</p> <p>Investment Fiji has more than FJD 300 million in pipeline tourism investments, but the need for infrastructure before building deters investors. The banking system is not conducive to moving money around quickly.</p> <p>The Investment Facilitation Committee is warmly welcomed.</p> <p>Are public-private partnerships in infrastructure possible?</p> <p>Most lease applications are on reserved land, which slows the process.</p> <p>An Expression of Interest (EOI) put out by Investment Fiji generated interest. Mataqali consent (60 percent must approve) is required. Mataqali increasingly wants support for equity investments.</p> <p>A wider conversation about the type of tourism Fiji wants to attract is needed to support Investment Fiji and others. A cultural lens is needed to ensure culture is promoted in an authentic way. It is okay to use contemporary elements if they showcase cultures.</p> <p>Tourism standards may help to get everyone on the same page and have a degree of quality assurance. Some aspects of traditional knowledge can be shared, but this is Vanua’s decision.</p> <p>Industry partners often do not know who to request support from. Community-based enterprises require inputs on assessing the type of business model to pursue, understanding what ecotourism means and the way to integrate conservation and natural heritage sites.</p>	<p>Infrastructure investments are critical to unlocking investment opportunities.</p> <p>Domestic tourism investors want to explore joint ventures and equity investments. An entity is needed with the capacity to support these types of investments.</p> <p>Community-based operators need focused attention as their issues are unique.</p> <p>In-depth consultations around business structure and governance are needed to suit different types of businesses.</p> <p>A cultural lens should be applied to ensure that culture is included in the NSTF.</p> <p>A coordination approach with the Ministry of Education to tourism and school partnerships is required.</p>



Visitor economy

FGD details	FGD question and key messages	Recommendations
<p>24.03.23</p> <ul style="list-style-type: none"> Fiji Revenue and Customs Service Fiji Bureau of Statistics Reserve Bank of Fiji MTCA IFC <p>Participants W - 6 M - 2 Total = 8</p>	<p><i>“Tourism is a major contributor the Fijian economy. How can we strengthen partnerships to harmonize and improve accessibility of data relating to tourism’s value to the visitor economy to better value and inform our policies?”</i></p> <p>Various organisations are responsible for producing different data sets.</p> <p>FRCS has relatively complete data for tourism sales, employees and are willing to share the information with other agencies.</p> <p>FBoS releases visitor arrivals in a timely way, but some sources of tourism-related data are released a year after production, making them less relevant for decision-makers.</p> <p>Discussions are ongoing about which year for visitor per diem/spend IVS data should be used. As FBoS is not involved in the IVS, it requires the Ministry of instruct it to use the IVS data.</p> <p>Most data for 2022 is not available. Earlier years are less relevant from a tourism recovery perspective.</p>	<p>Need greater and faster sharing of data and information across entities.</p> <p>RBF will share its internal study timeline for the tourism sector.</p> <p>FRCS can share more aggregated information on the number of employees and their tax brackets.</p>

Community-based tourism

FGD details	FGD question and key messages	Recommendations
<p>24.05.23</p> <ul style="list-style-type: none"> Yasawas Cooperative MTCA Veikau Lodge Vuadomo Waterfall Domoika Adventures IFC TLTB Ministry of Rural and Maritime Development Fiji Development Bank <p>Participants W - 5 M - 5 Total = 10</p>	<p><i>“What are the specific financing and technical needs for smaller, community-based tourism businesses and how can we encourage them while empowering locals”</i></p> <p>Increased localisation of tourism investments.</p> <p>Desire for greater opportunities for community-based tourism, with differentiations between community-based and community-owned and led.</p> <p>Community-based enterprises need mentoring and coaching and ongoing support, not just finance for startups.</p> <p>Community operators struggled during COVID-19 and felt abandoned by the government. They do not have access to market intelligence and experienced multiple shocks without the capacity to adapt.</p> <p>Divergent views have been expressed on an indigenous tourism council, with a more coordinated approach needed. Some iTaukei feel this would confine their issues to a separate forum without visibility, while others feel it is important to have a group able to put forward issues.</p>	<p>Domestic tourism investors want to explore joint ventures and equity investments. An entity with the capacity to support these types of investments is needed.</p> <p>Pull together information to dispel myths surrounding community-owned enterprises.</p> <p>Support enterprises with appropriate and tailored information, coaching and mentoring.</p> <p>Follow-up with iTaukei affairs on results of the recent cultural heritage mapping exercise.</p> <p>Support training and the roll out of the Fiji Code of Conduct.</p> <p>Establish an iTaukei Tourism Council or subgroup of an existing body.</p> <p>Work with Fiji Development Bank to identify products suitable for addressing unmet demand from producers.</p>

Tourism Standards

FGD details	FGD question and key messages	Recommendations
<p>24.05.23 (held as FGD within NSTFSC Monthly Meeting)</p> <ul style="list-style-type: none"> • MTCA • FHATA • Tourism Fiji • Fiji Airways • Duavata Sustainable Collective • United Nations Resident Coordinator Office • IFC • Talanoa Consulting • Pacific Private Sector Development Initiative • Suncoast Tourism Association <p>Participants W - 12 M - 4 Total = 16</p>	<p><i>“What is an appropriate Tourism Standards model for Fiji, and to what extent can existing frameworks of CFC and SPTO regional standards fast-track the design and implementation?”</i></p> <p>Proposed to take the global standards of the Global Sustainable Tourism Council (GSTC), to regional framework (as already done by SPTO) then contextualize to the national level. For NSTF adoption, initially on a self-compliance basis.</p> <p>The GSTC talks about the destination and industry standards.</p> <p>It is important to seek Steering Committee thoughts on the Care Fiji Commitment (CFC) and whether it has ongoing brand value (including positive vs. negative associations).</p> <p>The idea of adopting the CFC standard/ recognition branding is timely. Need to ensure it is a nationwide recognition programme. Awareness is key and educating is a simple process. Alignment to regional standards also means Fijian standards.</p> <p>Smaller organisations and MSMEs would support driving the sustainability message.</p> <p>While advantageous to have CFC incorporated as it was voluntary, Tourism Fiji had challenges with monitoring.</p> <p>Sustainability has significant traction, but there is a risk of an influx of businesses signing up from other sectors or faking credentials (experience of CFC brand merchandise printed and replicated without authorisation).</p> <p>There were some minimum requirements, but the ability to monitor is unclear (spot checks).</p> <p>There is a need to be vigilant against people taking advantage of the system and greenwashing with actors buying their way in. Monitoring and policing will be key, but the sector must be mindful of not hindering growth for small businesses.</p> <p>The entry point could be training modules and commitments to measure.</p> <p>Key issues out of the baseline assessment: Climate Change Act with potential alignment, Business Link Pacific (BLP) as an advisory service for SMEs, the organic movement (participatory scheme), and conservation organisation – strengthening links within conservation groups and tourism industry, for example.</p>	<p>The second model (refer Figure 15 below) of adopting and adapting the SPTO-developed Pacific Sustainable Tourism Standards proposed by IFC seemed an appropriate approach that would be manageable and on a voluntary basis. Long-term goal would be GSTC-recognition for the Fiji standards.</p> <p>If it becomes swamped, spot checks can be conducted with the possibility to request support from the GSTC.</p> <p>Put together some controls especially on the regulations.</p> <p>Recommendation to use the CFC and tour operator standards, with the adoption of SPTO’s PSTPF to make it more regional and get more onboard.</p>

Figure 15. Proposed structure for Fiji Sustainable Tourism Standards



Source: IFC

Annex 3 - Literature Review

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