

FIJI NATIONAL SUSTAINABLE TOURISM FRAMEWORK

DRAFT FOR TOURISM CONVENTION

15 December 2023



**Ministry of
Tourism and
Civil Aviation**



EXECUTIVE SUMMARY

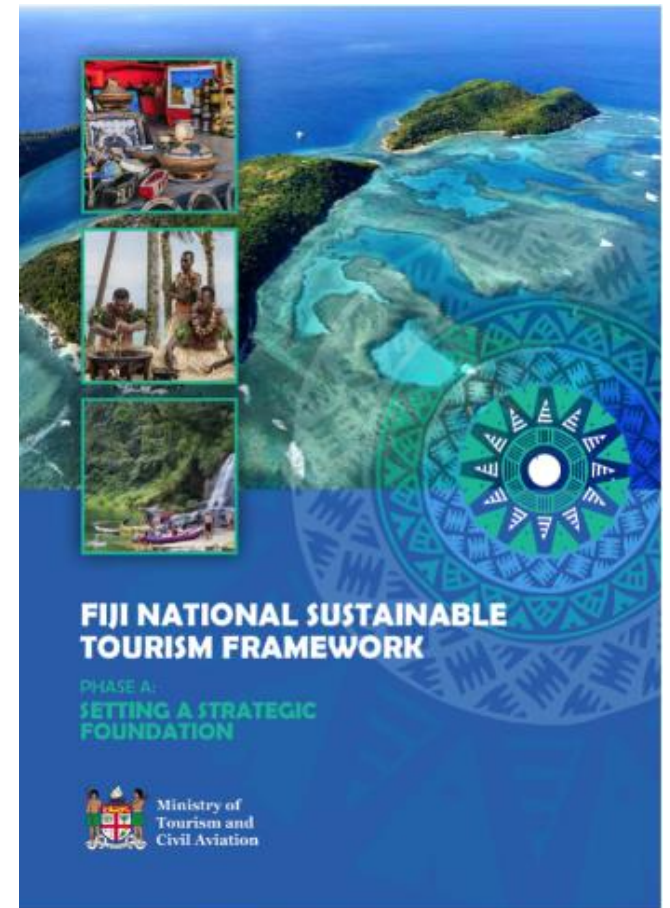
Fiji National Sustainable Tourism Framework

The Fiji National Sustainable Tourism Framework 2024 to 2033 shares the collective vision and goals of the Fijian tourism industry. It outlines the overarching vision for transforming the Fijian tourism sector to ensure a sustainable future that has the economic and social wellbeing of our people, our ocean, our environment, and our culture at its heart. It lays out a clear policy direction, with this high-level framework accompanied by an initial three-year Action Plan (2024-2027).

The framework articulates the strategic direction of the tourism sector over the next 10 years, providing a blueprint for Fijians to develop and benefit from our precious 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.

[PHASE A: SETTING A STRATEGIC FOUNDATION](#) captures key findings that lay the foundation for the priorities that underpin our tourism vision



Our Vision for tourism

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The NSTF reflects the shared vision of the diverse range of tourism sector stakeholders. This includes a wide constituency of government agencies, industry associations, private sector operators, civil society organisations and development partners. The framework calls on all partners with a role in shaping the future of the tourism sector to align their efforts with the vision, goals and priorities articulated here. This will require deeper collaboration, coordination, and coherence, embodying a spirit of *solesolevaki* built on mutual trust and respect, recognising the importance of the diverse roles and responsibilities of everyone involved in tourism.

Structure & Hierarchy

The audience of the National Sustainable Tourism Framework 2024-2033 is primarily domestic, setting a vision for the future of the sector that will be jointly achieved by many diverse actors across Fiji. External partners and investors can also use the NSTF to align their planning with the overall national goals and priorities. The NSTF has a hierarchy that includes a Vision, Values, Goals, Priorities and Outcomes, as shown below. The 2024-2027 Action Plan will be accompanied by Performance Measure to track progress. A monitoring, evaluation and learning plan will be developed to ensure there is robust tracking of actions, priorities and objectives with key performance indicators aligned to the regional sustainable tourism indicators.



NSTF Goals

The NSTF has four Goals, derived from the Pacific Tourism Organisation [Pacific Sustainable Tourism Policy Framework](#) (PSTPF). Through the Phase A consultative process, Fiji tourism stakeholders determined how best to capture Fiji's unique opportunities, challenges and aspirations into these high-level Goals that will support the NSTF Vision

1. **PROSPEROUS VISITOR ECONOMY**
2. **THRIVING AND INCLUSIVE COMMUNITIES**
3. **VISIBLE AND VALUED CULTURES**
4. **HEALTHY ISLANDS AND OCEANS**



NSTF Priorities

Drawing inspiration from the PSTPF Priorities, ten Fiji-specific priorities for the NSTF have been identified:

1. PROSPEROUS VISITOR ECONOMY

- i. Create an enabling policy environment and regulatory coherence
- ii. Nurture sustainable investments
- iii. Create a competitive destination with diverse experiences

2. THRIVING AND INCLUSIVE COMMUNITIES

- iv. Place community empowerment and social inclusion at the centre of tourism planning
- v. Grow experiential and culturally responsible tourism that supports tourism dispersal
- vi. Make tourism a career pathway of choice via rewarding employment and entrepreneurship

3. VISIBLE AND VALUED CULTURES

- vii. Protect and promote our diverse cultures and traditions
- viii. Enable prosperous and creative industries

4. HEALTHY ISLANDS AND OCEANS

- ix. Strengthen protection of our islands, coastal and ocean ecosystems
- x. Build resilience to climate change and transition to a low-carbon sector





SECTION 1: BACKGROUND

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.

1.1 Tourism in Fiji

Tourism and travel have become a critical part of the global economy. **By the end of 2023, the global industry is set to reach a value of USD9.5 trillion**, a recovery of 95 percent over pre-pandemic 2019 levels (WTTC, 2023) and is projected to grow in the next decade **reaching USD15.5 trillion by 2033**. In the next decade, the industry will account for **more than 11.6 percent of the global economy**, compared to 10.4 percent of the global GDP in 2019. According to WTTC projections, **the sector will employ over 430 million people** or 12 percent of the total working population in the world.

Tourism has become a key pillar of the Fijian economy with increasingly deep and varied connections and impacts on Fijian society, culture, and environment.

Over the last 30 years, tourism has grown from around 300,000 arrivals in 1993 to a forecasted 930,165 in 2023 . Statistics from the provisional visitor arrivals show that from January 2023 to October 2023, approximately 772,172 visitors arrived in Fiji . However, visitor arrivals are an incomplete measure of the contribution of the sector to Fiji's society. In 2019, when 894,389 visited Fiji, the sector employed an estimated 34.5 percent of total formal economy workers or 62,277 employees . It contributed over FJD500 million directly to total tax revenue representing around 18 percent of the government's total tax revenue and over FJD2 billion in foreign exchange earnings. In 2023, the sector recovered to pre-COVID level earnings and higher per capita spend . The sector is worth an estimated FJD3bn per annum.

Given the importance of the tourism sector to the nation, and the dependency on it, it is critical that its future is sustainable. Tourism must continue contributing toward the achievement of the Sustainable Development Goals. Existing and new strategies must be implemented to increase its contribution to poverty alleviation, community development and wellbeing, health, education, agricultural development, environmental conservation, cultural heritage conservation, and indigenous entrepreneurship.

1.2 Emerging trends, opportunities & challenges

The report [PHASE A: SETTING A STRATEGIC FOUNDATION](#) captures the results of a baseline assessment and the consultations that were held between August 2022 and October 2023, with the following trends, opportunities and challenges identified:

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					

1.3 Positioning Fiji's tourism sector for a sustainable future

This 10-year National Sustainable Tourism Framework (NSTF) outlines the collective vision for transforming the Fijian tourism sector to ensure a sustainable future that has the economic and social wellbeing of our people, our ocean, our environment, and our culture at its heart. One that contributes to the overall development priorities of the current generation without compromising the ability of future generations to meet their development goals. It lays out a clear policy direction, with the high-level framework accompanied by an initial three-year Action Plan (2024-2027) striving for sustainable growth.

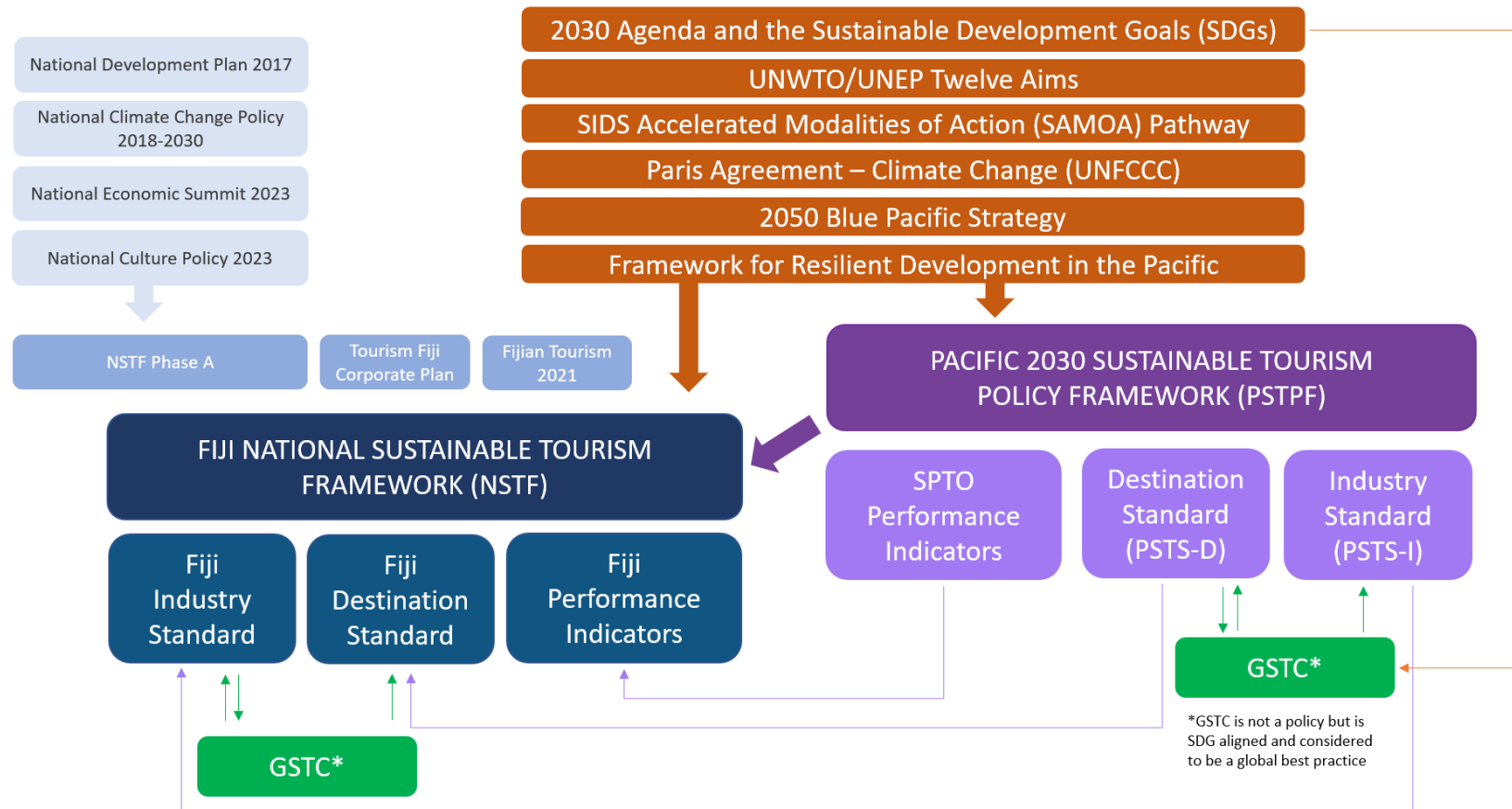
The framework articulates the strategic direction of the tourism sector from 2024 to 2033, providing a blueprint for Fijians to develop and benefit from the country's tourism resources. The design of the NSTF is based on thorough research, qualitative and quantitative evidence, recommendations from the 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.

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 tourism investment strategies and regulatory coherence. It is already reflected in Tourism Fiji's refreshed 2023 brand campaign, 'Where happiness comes naturally', which shifted marketing strategy to prioritise attracting a more responsible and values-based traveller, and offering a deeper connection to Fijian culture, community, and values.

1.4 Aligning to international, regional, and national commitments

The NSTF draws upon and will align with numerous international, regional and national commitments, policies and frameworks.



International polices and frameworks

Tourism is explicitly mentioned in **Sustainable Development Goals (SDGs)** 8, 12 and 14, on inclusive and sustainable economic development, sustainable consumption and production and sustainable use of oceans and marine resources, respectively. As a cross-cutting sector, tourism contributes to all 17 SDGs, with some targets specific to sustainable tourism.

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

SUSTAINABLE DEVELOPMENT GOALS





The United Nations World Tourism Organization (UNWTO) and the United Nations Environment Programme (UNEP) identified **twelve aims for sustainable tourism** to guide policy makers as detailed in section 2.2 below.



Whilst not a policy or framework as such, the **Global Sustainable Tourism Council® (GSTC)** establishes and manages global standards (the GSTC criteria) for sustainable travel and tourism. The GSTC is an independent and neutral organisation with a diverse membership of countries (including Fiji), regions and cities/destinations, all with a vision that tourism fulfils its potential as a vehicle for social, cultural, and economic good while removing and avoiding any negative environmental and social impacts. It is globally recognised as providing benchmarks for sustainable tourism destinations and industry best practice.

Regional policies and frameworks

Tourism also has a critical role to play in the region's efforts to address the climate change crisis, to accelerate the decarbonisation of our economy, and to incorporate climate and disaster risks into all current and future investments, contributing to the **Small Islands Developing States Accelerated Modalities of Action (SAMOA) Pathway**, the **United Nations Framework Convention on Climate Change's Paris Agreement** and the **Framework for Resilient Development in the Pacific**.

The Blue Pacific 2050 Strategy recognises the role of the tourism sector as a key contributor to economic development, investment and employment creation. The role of the private sector and micro, small and medium-sized enterprises (MSMEs) are highlighted as vital for improving and expanding wellbeing opportunities and the tourism sector is recognised as a sector that plays a critical role in creating entrepreneurial opportunities within the creative arts, agriculture, fisheries, construction, retail, food and beverage sectors.

“The region already faces the dual challenge of fiscal sustainability risks in the short term and financing shortfalls in critical areas, especially in the fight against climate change, increasing the urgency to consider innovative financing instruments and mechanisms. Diversifying our investment portfolios, increasing the role of the private sector in important areas such as fisheries, agriculture, forestry, mining and tourism, and cultural industries and creating employment and entrepreneurial activity in the micro, small and medium-sized enterprises (MSMEs) are vital for improving and expanding wellbeing opportunities for Pacific peoples.”



The **Pacific Tourism Organisation (SPTO)** in collaboration with its member countries, and the national tourism organisations across the region, has created the **Pacific Sustainable Tourism Policy Framework (PSTPF)** in response to the call in the Pacific to transform the tourism sector into one that truly contributes to the sustainable development of our region. Based on extensive consultation, Pacific stakeholders identified the need for tourism to “improve the wellbeing of our communities, strengthen our cultural identity and protect and restore our lands and oceans”.

The SPTO also led the **Pacific Sustainable Tourism Commitment**, signed to date by 19 Pacific Countries including Fiji, and developed the Pacific **Regional Sustainable Tourism Standards for Destinations and Industry**, which are GSTC-recognised (Destinations) and GSTC-aligned (Industry). These regional mechanisms act to guide the transformation of the tourism sector in integrating climate and disaster risk, social inclusion and generating prosperity for all. The four PSTPF Goals of Prosperous Economies; Thriving and Inclusive Communities; Visible and Valued Cultures, and; Healthy Islands and Oceans are adopted by the NSTF. The NSTF priorities are also closely aligned to those of the PSTPF, but Fiji’s unique values are used as the basis for localising and contextualising regionally agreed priorities into nationally led and driven priorities. A robust monitoring and evaluation plan will be developed alongside the NSTF Action Plan, and this will build from the **Pacific Sustainable Tourism Indicators** currently under development by SPTO under its Pacific Tourism Statistics Strategy .



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 Framework calls on all partners and stakeholders to coordinate 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.



**PACIFIC TOURISM
ORGANISATION**

National polices and frameworks

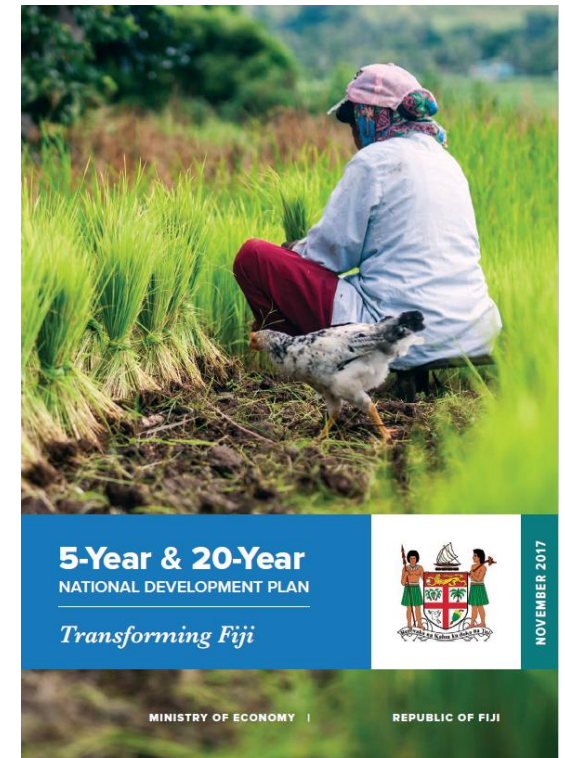
Fiji Government National Development Plan 2017-2036

The 5-Year and 20-year National Development Plan recognises the importance of tourism to the overall development of the country. Key long-term priorities emphasised include increasing the range of tourism products (sports tourism, cruise tourism, wedding tourism, retirement villages, medical tourism and conference tourism), filmmaking, regional communications and transport services, and other new initiatives.

Ecotourism and adventure tourism are also prioritised as opportunities to promote our unique biodiversity. The development of stronger tourism value chains is prioritised, including strengthened agricultural and fisheries links to promote locally grown foods and opportunities to promote traditional handicrafts and natural body products. There is a particular emphasis on expanding opportunities for women and MSMEs and ensuring that cultural heritage and heritage sites are both protected and promoted by the industry.

Investments in new sporting facilities built to international standards is recognised as necessary to position Fiji to host more international events. Expansion of the Fiji Airways fleet is identified as important for growing tourism through leasing of new aircrafts, and the development of new air connections and new routes. Domestic air services and upgrading works at domestic airports and airstrips over the next 20 years is also emphasised to support tourism dispersal.

Building on this, the Ministry of Finance, Strategic Planning, National Development and Statistics is currently leading the formulation of a new national development plan that seeks to strengthen the policy and planning within government, improve coordination, appraisal and selection of public investment projects, monitoring and evaluation of projects and strengthen national workforce planning and economic intelligence analysis.

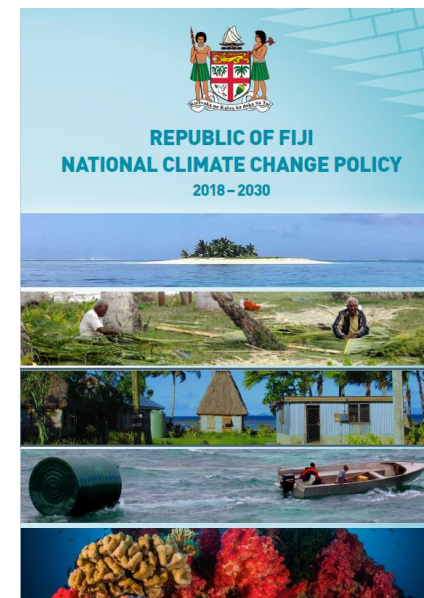


Fiji National Climate Change Policy 2018-2030

The tourism industry has a major role to play in supporting the delivery of targets under Fiji's Nationally Determined Contribution (NDC) including low carbon transport and energy transitions, adaptation activities, and support to monitor and protect Fiji's natural resources and biodiversity. Fiji's climate change response will increase opportunities for the tourism sector to derive sustainable value from the protection of Fiji's biodiversity. Incentives for the tourism industry to enhance and protect natural resources will be progressed through the National Adaptation Plan and Low Emission Development Strategy. Capacity building for tourism operators to help climate-sensitize their operations will be essential. Standardised best practice frameworks will be explored, and operators will be incentivised to invest in low emissions infrastructure and supply chains, use local produce, implement nature-based coastal protection projects, and develop business models that help to preserve rather than disrupt social cohesion and cultural practice.

Fiji National Economic Summit 2023

The Fiji National Economic Summit 2023 highlights the tourism industry as a key growth sector for Fiji. The Summit outlined achievable long-term (beyond five years), medium-term (three to five years), and short-term (less than two years) solutions for seven major issues the industry is now facing. These challenges and opportunities included (1) the need for climate-resilient infrastructure in different areas of the country, particularly in the rural, northern, and outer islands zones; (2) The migration of skilled labour; (3) Growing tourism-related investments, particularly in line with Fiji Airways' development strategy and the need for the hotel inventory to match growing flight capacity; (4) improving sector-specific links to increase Fiji's agricultural outputs and lessen the country's dependency on imports; (5) Greening the existing inventory and infrastructure to meet the sustainability agenda, including recycling and renewable energy; (6) Accelerate business reforms to assist the development, expansion, and creation of new markets or niches by removing legislative bureaucracy; (7) Prioritizing community-based operators and ecotourism.



Fiji National Culture Policy 2022-2032

Tourism is a cross-cutting theme within the culture policy and cultural tourism is identified as a specific priority to promote sustainable cultural tourism that nurtures culture, heritage, and the arts in Fiji. Cultural Tourism is identified as an important avenue to build local, regional, and international understanding and provide opportunities to strengthen intercultural relations, reduce conflicts and support peacebuilding. The support of partners to address challenges presented by tourism is critical. These include potential sexual exploitation, drug abuse, distortion of aesthetic and ethical values, commercialization and loss of artistic tangible and intangible culture and undermining and distortion of cultural norms and values.

Close collaboration between the Department of Culture, Heritage and Arts of the Ministry of iTaukei Affairs, Culture, Heritage & Arts and the Department of Tourism is emphasised to support the development of quality cultural tourism experiences and products, and for fair and equitable provision and use of cultural and creative products and services. Specific strategies to support this include the establishment of public and private sector networks, strengthened marketing of cultural products, festivals, and services, improvements to the preparedness and accessibility of specific heritage sites, promotion of biodiversity (marine and natural land-based heritage); and actions to minimize the negative impacts to cultural and natural heritage sites and local communities. An indigenous tourism framework that aligns with the National Sustainable Tourism Framework is currently under development.





SECTION 2: VISION & VALUES

The NSTF reflects the shared vision of the diverse range of tourism sector stakeholders. This includes a wide constituency of government agencies, industry associations, private sector operators, civil society organisations and development partners. The framework calls on all partners with a role in shaping the future of the tourism sector to align their efforts with the vision, goals and priorities articulated here.

2.1 Our Vision for tourism

We are proud of our diversity as a nation and our tourism sector reflects this diversity. Our collective success is underpinned by partnerships between a strong private sector, institutional investors, financial institutions, micro, small and medium enterprises, our communities and public sector agencies.

Embodying our value of solesolevaki, the success of our sector and its ability to deliver benefits for all depends on many people working together, jointly, to achieve a common purpose. This framework is not the government's framework. It is the framework of all stakeholders that are involved in the tourism sector. As diverse stakeholders working together, we are sailing in the same direction and share a collective vision for ensuring that the sector maximises its positive impacts for our communities, cultures and environment.

The COVID crisis showed how critical the sector is for our economy and it also allowed us time to reflect on the tourism sector and its role in contributing to our national development priorities. It also, once again, demonstrated the resilience of our people and our businesses to manage the most extreme shocks.

Our collective Vision for tourism is:

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OPTIONS FOR VISION

Option 1

By 2034, we are empowered by, and benefiting 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.

Option 2

By 2034, Fiji is empowered by and benefiting from tourism that is sustainable, resilient, prosperous and inclusive. It enriches communities' wellbeing, protects, restores and promotes our diverse cultures, islands and ocean ecosystems.

Option 3

By 2034, tourism is inclusive, provides fulfilling careers, generates equitable benefits and opportunities, and safeguards and promotes our diverse cultural heritage. It protects our unique biodiversity, supports the decarbonization and resilience of our economy and society.

Option 4

By 2034, tourism actively contributes to the socio-economic wellbeing of communities; provides equitable learning, employment and entrepreneurship opportunities; restores and protects our unique cultural heritage and biodiversity; promotes sustainable development in a thriving inclusive and resilient industry.

2.2 Twelve aims for Sustainable Tourism

The UNWTO and UNEP have identified twelve aims for sustainable tourism relevant to the Pacific to which the Pacific Sustainable Tourism Policy Framework, the associated Destination Standard Criteria, the Sustainable Development Goals and the NSTF Goals align.

<p>Economic Viability To ensure the viability and competitiveness of tourism destinations and enterprises, so that they can continue to prosper and deliver benefits in the long term.</p>  		<p>Local Prosperity To maximise the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.</p> 		<p>Employment Quality To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or other ways.</p>  		<p>Social Equity To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.</p> 	
<p>Visitor Fulfilment To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.</p> 		<p>Local Control To engage and empower local communities in planning and decision-making about the management and future development of tourism in their area, in consultation with other stakeholders.</p>  		<p>Community Wellbeing To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.</p> 		<p>Cultural Richness To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.</p> 	
<p>Physical Integrity To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment</p> 		<p>Biological Diversity To support the conservation of natural areas, habitats and wildlife, and minimise damage to them.</p> 		<p>Resource Efficiency To minimise the use of scarce and nonrenewable resources in the development and operation of tourism facilities and services.</p> 		<p>Environmental Purity To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.</p> 	

2.3 Fijian Guiding Principles and Values

These guiding principles and values underpin the way in which we will collectively implement the NSTF. They draw from our rich and diverse cultural heritage and our indigenous values of stewardship but are applicable to all who call Fiji home, including our visitors who we share our home with during their stay.

We are located in the heart of the Pacific. Our people have shared ancestry from across the region and beyond. As proud people of the Pacific, we share responsibility for our vast ocean, our land and our biodiversity. The NSTF is grounded in our values of stewardship of our vanua and these have informed the Guiding Principles and Values that underpin the framework.

Solesolevaki - *solidarity, unity, social cohesion*

A group of people coming together with shared interests and values, joining hearts, heads and hands to achieve a goal for the greater good together.

Cooperation and partnerships are critical to the achievement of the goals of the NSTF. Various public, private, civil society and community actors play a role in supporting sustainable tourism. We can also learn and contribute to regional and global partnerships, benefitting from advice and lessons from elsewhere in the world. Within community-based operations, solesolevaki also often underpins the way many communities work together to contribute time to develop and manage community-based enterprises founded on these values.

Solesolevaki is inclusive of other values such as veiwakani or the care and respect with which we nurture relationships with both people and the environment. This is not limited to family and encompasses the whole society, those in Fiji and abroad. It includes taking care of the land, ensuring our guests experience everything as though they were family and are made to feel at home. Guests in turn are responsible and respectful of our customs and values.

Na yalo ni veivakaturagataki - *A respectful spirit*

Veivakaturagataki is to carry out traditional practices showing respect to the land, people, culture and its ancestors. It emphasises respect, love, care and being selfless.

This overarching value encompasses other relevant values such as

- Na yalo ni veilomani To love, to care
- Na yalo ni veidokai To respect
- Na yalo ni veinanumi To be thoughtful and selfless

In the context of this framework, this value is important in ensuring that all stakeholders in the industry are working respectfully and harmoniously. Everyone has skills and knowledge that they bring to the table. We treat everyone with respect and afford our guests respect. For community-based operators, it relates to sharing our cultural practices and way of life to our vulagi (guests), while they reciprocate the learnings by showing a level of respect to the communities they visit.

Na yalo ni veiqaravi - *A heart for service*

Veiqaravi or service - is an essential part of our tourism sector. Fijians are renowned for our naturally warm and beautiful bula smiles. This value underpins the importance of providing genuine and warm welcome for our guests.

In the context of this framework, we collectively serve with passion, warmth and dedication to ensure the goals, priorities and objectives are achieved, based on the responsibility assigned to us.



SECTION 3: GOALS & PRIORITIES

Through the Phase A consultative process, Fiji tourism stakeholders determined how best to capture Fiji's unique opportunities, challenges and aspirations into these high-level Goals that will support the NSTF Vision. Drawing inspiration from the PSTPF Priorities, ten Fiji-specific priorities were then identified.

Summary of Goals & Priorities

Goal 1: Prosperous visitor economy	Goal 2: Thriving and Inclusive Communities	Goal 3: Visible and Valued Cultures	Goal 4: Healthy Islands and Oceans
Tourism supports a prosperous, modern and resilient economy	Tourism empowers and improves the wellbeing of our communities	Tourism amplifies and promotes our diverse culture and heritage	Tourism accelerates climate action, protects our ecosystems, and supports resilience
1. Create an enabling policy environment and regulatory coherence	4. Place community empowerment and social inclusion at the centre of tourism planning	7. Protect and promote our diverse cultures and traditions	9. Strengthen protection of our islands, coastal and ocean ecosystems
2. Nurture sustainable investments	5. Grow experiential and culturally responsible tourism that supports tourism dispersal	8. Enable prosperous and creative industries	10. Build resilience to climate change and transition to a low-carbon sector
3. Create a competitive destination with diverse experiences	6. Make tourism a career pathway of choice via rewarding employment and entrepreneurship		



GOAL 1: PROSPEROUS VISITOR ECONOMY

Tourism supports a prosperous and resilient economy

1. Create an enabling policy environment and regulatory coherence

2. Nurture sustainable investments

3. Create a competitive destination with diverse experiences

Outcomes

- Sustainable tourism is inclusive and effectively planned and coordinated, policy reforms are accelerated, and the coherence of the policy environment is improved providing clarity and certainty to new and existing operators and investors
- Sustainable tourism standards promote overall sustainable tourism development and provide clear guidance for products, experiences and investments on nurturing sustainable tourism enterprises and attracting responsible visitors
- Partnerships between resource owners, domestic and international investors support the ongoing localisation of tourism investment are strengthened
- Increased numbers of MSMEs, women-led and indigenous community-based operators thrive as a result of partnerships with business incubation and accelerator programmes, improved guidance for experience development, strengthened business advisory services, streamlined regulatory processes and a pipeline of suitable sources of flexible finance
- Increased investment in roads, airports, wharves, jetties, renewable energy, water, communications and digital payment infrastructure supports the diversification and dispersal of tourism products and experiences and the realisation of sustainable tourism investments in remote areas
- Active monitoring of the value of tourism and its impacts improves the evidence base for tracking tourism sustainability and recalibrating priorities as needed for responsible destination management

Priority 1: Create an enabling policy environment and regulatory coherence

As a cross-cutting sector, sustainable tourism must be **coherently planned and coordinated** which requires **strengthening coordination and institutional capacity**. Multiple policy areas must be integrated to achieve coherence across diverse legislation, policies and guidelines, and to support government, industry and communities to protect the natural and cultural assets upon which tourism depends.

There is currently a wide range of government agencies and actors involved in the policies and regulations that impact the tourism sector. As an urgent priority reflected in the action plan, the NSTF will **promote a whole-of-government and whole-of-society approach to tourism planning and development** and **improve clarity and guidance on various agencies' responsibilities** with the aim of **reducing regulatory uncertainty**.

At the strategic level, the NSTF aligns with several existing policies and strategies, including the National Development Plan, the Green Growth Framework, the Climate Change Act 2021, and the National Ocean Policy 2020-2030. The **development of sustainable tourism standards to promote sustainable tourism development**, aligned to the Global Sustainable Tourism Council (GSTC) recognised Pacific Regional Sustainable Tourism Standards, can support this alignment.

To achieve coherence the metrics used to measure the success of our sector must be improved and broadened since economic metrics alone are not sufficient to track progress. There is a need to **strengthen the evidence base to provide decision makers and investors with accurate, holistic and timely information**. Against a backdrop of worsening climate and disaster risks there is also a need to **strengthen risk management capabilities within the sector to support sector resilience**.

At the operational level, it is necessary to **streamline regulatory requirements affecting the tourism sector**. While larger operators may navigate this space with the assistance of lawyers and accountants, most smaller tourism operators rely on business networks and other operators for advice, becoming aware of specific rules or requirements in an ad-hoc manner.

It is critical to boost MTCA's capacity to effectively coordinate tourism planning and achieve regulatory coherence across the many government agencies and statutory bodies that affect the tourism sector. The Ministry of Trade, Co-operatives, SMEs and Communications (MTCSMEC) similarly plays a vital coordination role in championing regulatory reforms to support business development.

Accelerating the policy reforms to overcome barriers to entry for small and community-led businesses is essential for promoting tourism diversification and strong tourism value chains. **Streamlining licensing requirements** in other areas such as maritime transport and promoting multi-use lease arrangements that encourage agri-tourism and businesses with multiple revenue streams is important for sector resilience. **Improving the guidance available to new and existing operators and investors**, including auxiliary services to the tourism sector, via the bizFiji online portal in development, Investment Fiji and other platforms will 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 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.

Priority 2:

Create an enabling policy environment and regulatory coherence

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. The NSTF **provides clear guidance on the types of tourism investments that are consistent with nurturing sustainable tourism** ventures. A stable and improved regulatory framework and expanded partnerships promotes the diversification of tourism investments and supports community and iTaukei-led tourism.

In the absence of common language or industry standards, greenwashing is a growing issue that requires active monitoring. The NSTF provides direction to **introduce tourism standards at destination and industry level**, such as the GSTC-recognised Pacific Sustainable Tourism Destination Standard. This will necessitate greater coordination across government and industry to **embed sustainability across all aspects of tourism planning, development and management**. Adapting these regional standards to the Fiji context provides a cost-effective option for destination and operator benchmarking, sustainability commitments and ongoing tracking. Regulatory requirements for MSMEs will be streamlined by shifting current regulatory requirements and including them within sustainable tourism standards and reporting. The national Code of Conduct for Tourism Service Providers will be further socialised and rolled out to industry.

A **coordinated and intentional investment promotion strategy supports ongoing localisation of tourism investments and** seeks to attract International and domestic financing and investors that share sustainable tourism values or are positioned to attract consumers that do. As the tourism industry grows the additional room inventory required to support anticipated growth, investment will be aligned to the environmental, social, and cultural policy aims of the NSTF. These broader policy objectives will be embedded within the investment promotion strategy and relevant tax incentives to attract the desired investment.

The NSTF guides ongoing **localisation of tourism investment**, including equity and consortia partnerships. iTaukei resource owners will be encouraged to formalise, explore equity and joint ventures and develop community-based operations. High-value tourists are a priority for tourism investment.

Starting a business in Fiji can be challenging and securing approvals for new projects can be a bureaucratic and burdensome process. This is a deterrent for local and foreign investors and constrains new developments and entrepreneurship. The NSTF builds on recent reforms to support sector digitisation and streamline approval processes to support the realisation of investments. An Investment Facilitation Committee, an inter-ministerial body under the MTCSMEC has been established to support the streamlining of investment-related processes.

Smaller entities tend to struggle to obtain finance to scale. Hence, they rely on internal sources of funds for any growth. The more entrepreneurial may seek funds from external sources, but expansion often becomes constrained by previous adverse experiences. There is a well-recognised gap in financing available for MSMEs. As they typically have limited track records, and little to no “acceptable” collateral or equity contributions to make towards the loan, they have considerable difficulty in obtaining finance from the formal financial sector. An initial priority for the action plan is **to identify suitable sources of finance for smaller companies and to build a pipeline of those looking to scale or replicate** current operations in another location due to their lower environmental footprint, may find it difficult to access finance.

Priority 3:

Create an enabling policy environment and regulatory coherence

Tourism is concentrated in the Coral Coast-Nadi-Denarau-Mamanuca-Yasawas corridor with experiences focussed mainly on ocean-based experiences. These areas will continue to attract investors as foundational tourism infrastructure (airports, roads, transport, ports) is already in place which lowers the costs of construction and provides access to a ready-made tourism market for experience development. Investment Fiji estimates around FJD320 million in pipeline tourism investments cannot be realised due to high infrastructure costs that would be borne by the developer.

Partners such as Investment Fiji, Tourism Fiji and the MTCA will work together to **expand investments and room inventory that aligns to the overall goals of diversifying accommodation and experiences**. Supporting **tourism dispersal will require investment in roads, airports, wharves, jetties, renewable energy, water, communications and digital connectivity** to reduce the capital investment required by investors, make investments in more remote areas of the country viable and support the digitisation of the sector. Coordination among relevant agencies to ensure MTCA and other relevant stakeholders are aware of the pipeline of infrastructure investments that could support tourism development is critical.

To achieve the aims of tourism dispersal and to spread tourism beyond the ‘tourism belt’, there is a need to **support product and experience development to promote equitable opportunities for enterprises**. Given the small size and varying levels of knowledge of many tourism operators, and the regulatory challenges associated with developing experiential tourism products, guidance will be developed to support MSMEs to understand the market opportunities available and socialised through **strengthened partnerships between public and private sector business advisory networks**. Addressing barriers to accessing opportunities requires support for **women, mataqali and community-led tourism enterprises thrive within tourism value chains**.

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. Improved collaboration between Fiji Airways and relevant tourism stakeholders is critical to diversifying the customer base and generating greater revenue and tourism spend in-country.

In general, higher value properties are higher yielding per visitor. Luxury holidays are expected to grow in popularity globally, with annual revenue from luxury hotel sales expected to reach USD92 billion by 2025 (compared to USD76 billion in 2019). **The NSTF targets higher value visitors and niche market segments to maximise economic, social, environmental and cultural sustainability**. Wellness and self-care are becoming increasingly important as reasons for travel with 49 percent of surveyed consumers indicating that the physical and mental health benefits of travel have become more important in their travel decisions. Developing these experiences further in Fiji could help to attract a different demographic of responsible travellers.

Special interest travellers include scuba divers, surfers and yachting. Although a seasonal market, the growth in small yacht and superyacht arrivals will further increase opportunities for investment and development of the segment. It also assists in spreading the benefits of tourism to non-traditional tourism regions. Similarly, expedition cruise ships offer opportunities for tourism dispersal to less visited regions, without the environmental impact of larger cruise ships. This could include marinas and yachting, targeted remote working properties, short-term rentals (Airbnb) and the apartment market. Specific marketing of these segments will **increase the revenue derived from niche, high-value, markets including cruise and expedition tourism**.

GOAL 2: THRIVING AND INCLUSIVE COMMUNITIES

Tourism empowers and improves the wellbeing of our communities

4. Place community empowerment and social inclusion at the centre of tourism planning

5. Grow experiential and culturally responsible tourism that supports tourism dispersal

6. Make tourism a career pathway of choice via rewarding employment and entrepreneurship

Outcomes

- A whole-of-society approach to tourism planning ensures greater alignment between tourism development and wider sustainable development goals
- Experiential, culturally immersive and adventure tourism generates opportunities for public private partnerships and social enterprises
- Barriers to the development of cultural, culinary and agritourism experiences are removed and the diversity of Fijian food is proudly promoted
- Women, youth and people with disabilities are empowered as leaders within the tourism sector
- Strengthened entrepreneurship coaching and mentoring, improved access to information and finance supports diverse small and medium enterprises, community and iTaukei-led tourism enterprises to thrive
- Tourism provides fulfilling career pathways and supports tourism professionals to realise their career ambitions
- Employment opportunities, workplace training, professional development exchanges, short term courses and scholarships provide useful connections for emerging professionals and a pipeline of job-ready staff to support the labour requirements of a growing industry

Priority 4:

Place community empowerment and social inclusion at the centre of tourism planning

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. Across government, the involvement of the Ministry of Women, Children and Social Protection, the Ministry of iTaukei Affairs and MSME Fiji are critical to shaping the trajectory of tourism development through strengthened whole-of-government coordination and governance mechanisms. The main industry bodies, the Fiji Hotel and Tourism Association and the Society of Fiji Travel Associates, and regional destination organisations play a vital role as knowledge brokers ensuring that industry views are represented effectively in national policy and marketing decision making and that members have access to current market intelligence, advice, media and trade opportunities. **The NSTF guides smaller organisations to play a more visible and active role in tourism planning and marketing**, particularly with a view to ensuring that **MSMEs strengthen their connection with Tourism Fiji, MSME Fiji and** organisation such as Business Assistance Fiji so they are provided the information, support and access to networks required to contribute to tourism planning and understand the investment and enterprise development opportunities.

Tourism entrepreneurship training currently happens in a relatively uncoordinated way through a variety of government and development partner incubation and accelerator programmes. The NSTF provides direction for **a coherent strategy for supporting tourism entrepreneurs, including iTaukei and community-led tourism, through greater collaboration with business advisory networks**. This will drive closer collaboration between MTCA, Investment Fiji and MSME Fiji alongside supportive partners such as Business Assistance Fiji, the Fiji Employers and Commerce Federation and others.

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 critical. The NSTF will support greater coordination between entrepreneurship support organisations and the emerging business advisory networks to grow their knowledge of tourism value chains to provide effective advice and support for existing and new tourism enterprises. Given the maturity of our tourism sector, a large number of Fijians have experience of the industry and are well placed to start their own enterprises with the right support.

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. **Working with existing business advisory groups and networks to increase the understanding of tourism opportunities is critical and MTCA can consider outsourcing business advisory services to private sector providers given MTCA's own capacity constraints.**

Investment Fiji works closely with Tourism Fiji and MTCA and partners to ensure that investment-ready smaller and community-based operators are connected with domestic and international investors as appropriate.

The measurement of tourism success has historically focussed on limited indicators of economic success including visitor arrivals and spend. **A more holistic approach to defining and measuring tourism success will be developed**, aligned to the SPTO 'Destination Standard indicators' that have been recognised by the Global Sustainable Tourism Council and the Pacific Sustainable Tourism Indicators. A Monitoring and Evaluation Plan for the NSTF will be developed and provide the basis of tracking sustainable tourism indicators in line with the regional tourism statistics framework.

Priority 5:

Grow experiential and culturally responsible tourism that supports tourism dispersal

Experiential, culturally immersive and indigenous tourism are growing market segments worldwide and **supporting iTaukei entrepreneurs, tourism professionals and our diverse communities to realise the leadership and business opportunities within the tourism sector** is a key priority. This includes supporting communities to make informed decisions about whether to host guests and the type of experiences and knowledge they wish to share.

Community-based and community-owned tourism is a specific segment that has been a target for product and experience development and investment historically with mixed results. Lessons from previous experiences, which have included provision of grants for infrastructure development, suggest a need to **improve the information available to communities on institutional and management options for business models** (trusts, companies limited by guarantee, limited liability companies, cooperatives). Critical to supporting iTaukei-owned businesses is also **streamlining the processes for leasing mataqali land to mataqali / LOU members and adjusting agricultural lease conditions to allow agritourism**. Supporting entrepreneurs to identify and develop the opportunities to centre their experiences based on their lived-culture and remain true to their values whilst still attracting responsible visitors is critical.

There is a well-recognised gap in financing available for micro, small and medium enterprises. As part of the NSTF implementation, **financial institutions and enterprise support organisations will improve access to finance, e-commerce and grants for MSMEs and pair this with appropriate long-term business coaching and mentoring**.

The NSTF will also strengthen opportunities for public-private partnerships and **leverage public financing for infrastructure improvements and site protection to improve opportunities for rural communities to engage in tourism**. It will also work with MTCSMEC and partners to identify MSMEs with the potential to scale or replicate current operations in another location and support them to access finance and advisory support to do so.

Priority 6:

Make tourism a career pathway of choice via rewarding employment and entrepreneurship

Staff retention has become a critical issue. Labour Mobility Schemes generate good remittances for Fiji, but they have also created a vacuum in the tourism industry. Many tourism stakeholders now accept that regular on-the-job training and ongoing recruitment is required.

To be truly resilient and sustainable, a pipeline of new staff, upskilling existing staff and new methods of staff retention are needed within all sectors of the tourism and hospitality industry. The focus of future training **must reorientate towards hospitality training and upskilling as a trade, rather than academic tourism studies**. In-house training programmes are encouraged, supported, and promoted. The NSTF **enhances collaboration between employers, academic and training institutions, encourages industry-led professional development programmes, and fosters mechanisms to retain and grow Fijian tourism leaders and entrepreneurs**.

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.

The Tourism Industry adopts best practice human resources policies, in line with Fiji laws and the Code of Conduct, and global commitments such as the UN Compact, including anti-harassment, domestic violence, flexible working, maternity and paternity leave, and career progression.

Mentoring opportunities between larger and smaller operators will be encouraged to strengthen capacity and mutual learning and peer to peer learning opportunities between smaller and community-based operators encouraged.

Future training development will be based on market demand including acknowledging the diversity of career opportunities within the tourism sector - for example marine biologists, climate specialists, farmers, electricians, plumbers. Trade and vocational courses and certificates will be made more accessible for rural and remote workers. Increasing training opportunities for guides, transfer providers, travel agencies and booking agents is important for ensuring that frontline tourism professionals are equipped with the skills and knowledge they need to feel empowered and motivated and to deliver exceptional guest experiences.

A training levy is paid by all tourism operators but is mainly utilised by large operators with full-time in-house training departments that can manage the paperwork involved.

GOAL 3: VISIBLE AND VALUED CULTURES

Tourism amplifies and promotes our culture and heritage

**7. Protect and promote
our diverse cultures and
traditions**

**8. Enable prosperous
and creative industries**

Outcomes

- The strong foundation of Fiji's people, environment, society and culture is protected and celebrated
- Environmental, social and cultural sustainability are embedded across all aspects of tourism
- Public-private partnerships promote cultural heritage conservation
- Cultural diversity and creative entrepreneurship are encouraged and valued
- The authenticity of our tangible and intangible cultural items is safeguarded and cherished, reducing the distortion of our cultural norms and values

Priority 7: Protect and promote our diverse cultures and traditions

Fiji's diverse cultures underpin the visitor experience. Our indigenous iTaukei culture has existed for over 3000 years and cultural experiences are a core part of our identity and our tourism brand. As the demand for cultural and experiential tourism increases, we must **ensure that tourism supports the revival and protection of traditional knowledge, arts and storytelling** that is fast eroding with increasing urbanisation. Indigenous values of environmental and cultural stewardship are reflected within each goal of the NSTF and will be reflected in the incorporation of cultural sustainability within tourism standards.

Village visits, opportunities to participate in yaqona ceremonies as part of guest welcoming sessions and traditionally inspired arts, crafts and creative performances have become integral to the visitor experience, but risk becoming insincere. **The Code of Conduct for tourism operators will be socialised** amongst operators to ensure that operators and guests deepen their knowledge and understanding of Fijian culture. The NSTF will support strong active engagement between the Ministry of iTaukei Affairs, Culture, Heritage and Arts, Ministry of Multi-Ethnic Affairs and Sugar Industry, the iTaukei Affairs Board and tourism stakeholders as part of an overall Tourism Taskforce to ensure that tourism plays an active role in traditional guardian and stewardship, reconnecting Fijians alongside our visitors to our land, our oceans, our totems, our stories. **Cultural standards will be implemented, as part of sustainable tourism standards, to improve representation of culture within the tourism sector.**

The reinstatement of the Roko Tui Saravanua and the translation of the Code of Conduct and other guidance material into vosa vakaviti supports Provincial Office staff to provide communities with updated information and guidance on the tourism sector. Storytelling is a core component of guiding and it is critical that guides are providing guests with accurate and authentic information to deepen their understanding of our cultural heritage. The NSTF encourages **partnerships that invest in the revival of traditional arts and storytelling** aligned to the national culture policy.

Tourism Fiji will continue to deepen their **respectful and responsible integration of our diverse cultures** within their branding and marketing campaigns. Good practice examples of partnerships between tourism operators, visual artists, dance and musical performers will be showcased and supplier listings of suppliers that can be contracted for events, performances and film productions will be maintained. Visiting media will be provided with cultural briefing and guidance pre-departure.

Guests will be encouraged to learn about Fiji's cultural heritage and lived culture throughout their stay and will be given **guidance on cultural etiquette to promote responsible and respectful travel**. Our marketing efforts will focus on targeting visitors that are a good fit for our culture and communities and will align to sustainable tourism standards and the national culture policy.

Given the importance of tourism to Fiji's economy, society and culture, the framework will be **translated into vosa vakaviti, Fiji Hindi and Rotuman** to support its socialisation across all parts of society.

Priority 8: Enable prosperous and creative industries

Our people are creative and produce a wide range of cultural artefacts, products and performances. The traditional skills and knowledge that underpin these products are eroding and creating opportunities for creative industries are critical in sustaining and increasing this knowledge. Combining aspects of indigenous knowledge with contemporary creativity can support innovation and entrepreneurship within the creative industries. Within the tourism industry there is a need to improve transparency across value chains, particularly in relation to benchmarking pricing for services to avoid a 'race to the bottom'.

The prevalence of overseas manufactured goods continues to be problematic. The NSTF, aligned to the Fiji National Cultural Policy and the Fijian Made brand, will **support the development of high-quality 'Fijian Made' and 'Fijian Crafted' artefacts, products and experiences** by promoting partnerships between values-driven private sector intermediaries and artisans and improve the representation of art and culture within the retail sector. Improving access to e-commerce solutions for smaller vendors is critical to ensure inclusive access to opportunities within the tourism sector. Creative performances often portray other Pacific Island Countries dances as Fijian, compromising the overall experience and Fijian brand. The NSTF will support closer collaboration between MTCA, Ministry of iTaukei Affairs, Culture, Heritage and Arts and other partners to promote authentic cultural performances and equitable value chains based on fair and transparent pricing for performers. Partnerships between the tourism industry and industry associations and groups of artists, performers, poets and storytellers will support a more authentic representation of Fijian culture, including recognition of the increasingly modern lived Fijian culture alongside traditional cultural performances and crafts.

The tourism sector could play a more active role in creating opportunities for new and emerging artists. **Strengthened partnerships between hotel brands, tourism associations, and interior designers will support the promotion of Fijian art** and suppliers within the industry. The creative industries can provide opportunities for the revival of traditional arts and stable employment opportunities for artists.

The NSTF will support the improvement in the knowledge and evidence base to improve decision making. There is limited information currently available to measure tourism's social impact, including understanding community attitudes with respect to tourism and how its activities contribute to cultural identity. Currently, most indicators used to track sectoral performance are economic focused rather than measuring tourism more holistically. There is a need to agree on and strengthen knowledge management systems and inter-agency coordination to ensure the 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.

A host country perception study will be developed to improve the availability of information.

Investment promotion strategies will integrate a stronger cultural lens to ensure investment that is aligned to the goals of this framework is attracted.

GOAL 4: Healthy Islands and Oceans

Tourism accelerates climate action, protects our ecosystem, and supports resilience

9. Strengthen protection of our islands, coastal and ocean ecosystems

10. Build resilience to climate change and transition to a low-carbon sector

Outcomes

- Social and cultural considerations are mainstreamed across all sectors of the economy including tourism
- Tourism accelerates climate action, protects our ecosystem, and supports resilience through alignment to commitments within the Fiji Climate Change Policy, National Adaptation Plan, Nationally Determined Contribution and Green Growth Framework
- Sustainability principles and existing climate, environmental and biodiversity commitments are integrated into future investment strategies, planning guidelines
- Partnerships between conservation organisations, communities and tourism operators are strengthened
- Waste management practices are improved, measured and managed with less waste production, increased recycling and incorporation of more reusable materials
- Visitors are engaged in sustainability measures
- Financing instruments to leverage public and private investment targeting sustainability initiatives are developed
- Decarbonisation and the transition to carbon neutral energy and transport systems are accelerated
- A holistic and intentional approach to risk management is applied to strengthen resilience
- Key threats to natural capital and infrastructure from climate change are reduced
- Crisis management systems are institutionalised and strengthened

Priority 9:

Strengthen protection of our islands, coastal and ocean ecosystems

Our natural environment is the foundation of the industry. Visitors to Fiji are attracted with images of our pristine beaches, our oceans, our rivers and our forests. **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 2021, the Green Growth Framework, and the National Ocean Policy 2020-2030. 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 reflects these commitments.

Our beaches, oceans, rivers, forests that attract 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. Whilst tourism can play a critical role in promoting environmental conservation, visitors can have significantly negative impacts if not well managed. The NSTF calls for the urgent identification of areas of key biodiversity, cultural heritage and environmental significance that require protection and restrictions on tourism development.

Tourism faces a range of significant sustainability-related challenges. The NSTF supports a growing awareness of the need and value of conserving unique natural, social and cultural assets and encourages 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. 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.**

The NSTF directs the **integration of sustainability principles and existing climate, environmental and biodiversity commitments into future investment strategies, planning guidelines** to support the shift required in the tourism industry's trajectory and guide future tourism development. Proposed industry standards will integrate sustainability commitments, providing a guide to future investments. They will incorporate stewardship principles while safeguarding indigenous principles and values.

Conservation organisations already work actively in partnership with many tourism operators and **strengthened partnerships between conservation organisations and tourism operators** can deliver greater support for the protection of our islands, coastal and ocean ecosystems. Tourism operators often have long standing relationships with communities in their area providing them with opportunities to support long term conservation efforts.

The private sector has played an instrumental role protecting Fiji's natural biodiversity. The Upper Navua Conservation Area, Namena Marine Reserve, and Vatu-i-Ra Conservation Park are formally protected with tourism resources supporting their protection. **Replicating these approaches in other parts of the country** requires stronger collaboration between the Protected Areas Committee and the tourism industry.

Increased attention to waste management is a prerequisite for a sustainable tourism sector. Whilst the sector itself often bears the impacts of poor waste management elsewhere, it can play a critical role in advocating for **improved waste management practices, increased recycling and incorporating more reusable materials** within the tourism industry itself. The NSTF encourages operators to **engage visitors in sustainability measures as an important part of their destination experience, explain the measures they are taking with respect to sustainability and to** incorporate stewardship, indigenous principles and values

Priority 10:

Build resilience to climate change and transition to a low-carbon sector

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. **Climate and disaster risks must be incorporated into new tourism development, investment guidance, city and town council guidelines and rural and community development planning.**

The scale of transition to a green, low-emission and climate-resilient circular economy is a huge structural adjustment. Transitioning to a net-zero society will require every sector, including tourism, to accelerate climate action including the transition to renewable energy, electric vehicles, improved waste management and localised procurement including food sources.

Large operators are preparing for climate- and nature-related risk reporting requirements. Fiji's Climate Change Act 2021 will also **require large companies to include climate risk disclosures in their financial reporting and encourage 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 Initiative, are also increasingly making booking decisions that align with their energy, waste and water targets. The NSTF will encourage partnerships between the private sector and civil society and to **share best practices and new ideas**, driving the shift to a new model of sustainable tourism development. Tools and processes to accountability for measurement of destination sustainability.

Fiji has launched Green and Blue Bonds and the Drua Incubator. The NSTF **promotes sustainable financing instruments to leverage public and private investment to support the decarbonisation** of the industry. Connecting tourism development with available green and other financing instruments is critical.

Disaster risks are intensifying with the impacts of climate change. 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. **A holistic and intentional approach to risk management is required to strengthen resilience.** This includes **improvements in services in high-volume tourism areas, business diversification and addressing broader social and cultural risks to tourism growth.** To address the ongoing migration of workers post-pandemic, the industry will continue 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 require 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. 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.

Institutionalising and strengthening 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.



SECTION 4: MONITORING, EVALUATION & LEARNING FRAMEWORK

The success of the framework will be measured by key performance indicators under each goal and as outlined below. Tracking the success of the tourism sector and the achievement of the goals, priorities and objectives outlined above requires a holistic approach to measuring key performance indicators and a strong commitment to data and information sharing across agencies.

GOAL 1: PROSPEROUS VISITOR ECONOMY

Tourism supports a prosperous and resilient economy

Indicator	Disaggregation	Sources
Visitor numbers <ul style="list-style-type: none"> • International • Domestic • Air/cruise • Length of stay Population (density and intensity)	<ul style="list-style-type: none"> • Absolute number and percentage change of visitor arrivals • Gender • Nationality • Country of Residence • Purpose of Visit • Destination in Fiji 	Passenger cards and Airline/Cruise Ship Manifests (Fiji Revenue and Customs Service - FRCS) / Department of Immigration - DoI) IVS and DVS (MTCA) <ul style="list-style-type: none"> • International Visitor Survey • Domestic Visitor Survey or studies Demographic Data (Fiji Bureau of Statistics - FBoS)
Visitor expenditure <ul style="list-style-type: none"> • International • Domestic 	<ul style="list-style-type: none"> • Gender • Nationality • Country of Residence • Purpose of Visit • Destination in Fiji 	IVS and DVS (MTCA) <ul style="list-style-type: none"> • International Visitor Survey • Domestic Visitor Survey or studies Tourism Earnings (FBoS)
Government Expenditure on Tourism	Per International Visitor	Foreign exchange data (Reserve Bank of Fiji - RBF) Government Budget Estimates (Ministry of Finance - MOF)
Income <ul style="list-style-type: none"> • Output • Value added • Contribution to GDP 	Contribution to GDP <ul style="list-style-type: none"> • Tourism Leakage 	National Accounts, Tourism Satellite Account (FBoS) Specific tourism studies (RBF)
Tourism Businesses (Percentage of Registered Tourism Businesses to Total Registered Businesses)		

GOAL 2: THRIVING AND INCLUSIVE COMMUNITIES

Tourism empowers and improves the wellbeing of our communities

Indicator	Disaggregation	Sources
<p>Accommodation Industry</p> <ul style="list-style-type: none"> No. of businesses No. of beds No. of beds with accessible infrastructure Occupancy rate Employment (by gender) Income (by gender) 	<p>Occupancy rate</p> <ul style="list-style-type: none"> Business Size Type of Accommodation Geographic Location 	<p>Company registration records (RoC) Establishment survey (FBoS)</p> <p>STR data (Tourism Fiji - TF) National Accounts, Tourism Satellite Account (FBoS)</p>
<p>Community and visitor perceptions of tourism</p> <ul style="list-style-type: none"> Local community perceptions (Percentage of population supportive of Tourism Development) Visitor perceptions (Percentage of International Visitors satisfied with overall experience at destination) 	<ul style="list-style-type: none"> Gender Employment Status Geographic Location Gender Employment Status Nationality Country of Residence Destination in Fiji 	<p>Community Surveys (MTCA / TF)</p> <p>IVS and DVS (MTCA)</p> <ul style="list-style-type: none"> International Visitor Survey Domestic Tourism in Fiji
<p>Tourism income distribution</p> <ul style="list-style-type: none"> Local International 	<ul style="list-style-type: none"> Gender Age Ethnicity Average salary Education level 	<p>Household Income and Expenditure Surveys, Population Census (FBoS) National Accounts (FBoS)</p>

GOAL 2: THRIVING AND INCLUSIVE COMMUNITIES

Tourism empowers and improves the wellbeing of our communities

Indicator	Disaggregation	Sources
Tourism Employment	<ul style="list-style-type: none"> • Gender • Formal and Informal Sector • Industry • Workers with a Disability • Local and Expatriate Workers • Geographic Location 	Employment surveys, Tourism Satellite Account (FBoS) Immigration records (FRCS/Dol) Informal economy research
Tourism Intensity (Number of International Visitors per 100 residents)	Destination in Fiji	Passenger cards and Airline/Cruise Ship Manifests (FRCS/Dol) National census (FBoS)
Tourism Seasonality (International Visitors Seasonality Ratio)	Destination in Fiji	

GOAL 3: VISIBLE AND VALUED CULTURES

Tourism amplifies and promotes our culture and heritage

Indicator	Disaggregation	Sources
Visitors (international and domestic) <ul style="list-style-type: none"> • Cultural activities • Cultural expenditure 	<ul style="list-style-type: none"> • Gender • Geographic location 	IVS and DVS (MTCA) <ul style="list-style-type: none"> • International Visitor Survey • Domestic Tourism in Fiji studies Tourism earnings (FBoS)
Community perceptions of tourism <ul style="list-style-type: none"> • Local community perceptions 	<ul style="list-style-type: none"> • Gender • Employment Status • Geographic Location 	Community Surveys (MTCA / TF)

GOAL 4: HEALTHY ISLANDS AND OCEANS

Tourism accelerates climate action, protects our ecosystem, and supports resilience

Indicator	Disaggregation	Sources
Land and Marine Condition <ul style="list-style-type: none"> Number and extent of protected areas 	Terrestrial <ul style="list-style-type: none"> Type of Protected Area Expenditure / Investment on environmental activities undertaken by tourism industries Marine <ul style="list-style-type: none"> Sea Water Quality Index of coastal eutrophication and plastic debris density Average marine acidity (pH) measured at agreed suite of representative sampling stations 	Protected Areas Committee Conservation organizations SPREP Pacific Islands Protected Area Portal
Disaster events <ul style="list-style-type: none"> No. of disaster events 		Environment Surveys (Environment/Climate Change Ministry) Ministry of Waterways and Environment Fiji Climate Change Portal
Visitors (international and domestic) <ul style="list-style-type: none"> Nature tourism Marine protection Business Demographics Businesses certified in sustainable tourism practices 		IVS and DVS (MTCA) <ul style="list-style-type: none"> International Visitor Survey Domestic Tourism in Fiji (MTCA) Standards reporting (MTCA) Company registration records (RoC) Establishment survey (FBoS)

GOAL 4: HEALTHY ISLANDS AND OCEANS

Tourism accelerates climate action, protects our ecosystem, and supports resilience

Indicator	Disaggregation	Sources
Tourism Density (Number of International Visitors per hectare of Habitable Land)	Geographical Location	
Accommodation Sector Energy use <ul style="list-style-type: none"> Percentage of Tourism Accommodation Businesses using Renewable Energy Electricity use in Tourism Accommodation Establishments per International Visitor Night 	Business Size Non-renewable and renewable electricity used Geographical Location	Environmental accounts (FBoS) Establishment survey (FBoS) Energy Fiji Limited (EFL)
Water use (Water Use in Tourism Accommodation Establishments per International Visitor Night)	Geographical Location	
Emissions (GHG emissions in Tourism Accommodation Establishments per International Visitor Night)		Water Authority of Fiji (WAF)
Waste (Solid Waste Generated per International Visitor Night)		

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