



FIJI NATIONAL SUSTAINABLE TOURISM FRAMEWORK

PHASE A: EXECUTIVE SUMMARY



Ministry of
Tourism and
Civil Aviation

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.”

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



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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

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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



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Masi design credit: Wati Maraiwai Talavutu

Photography credit: Tourism Fiji

Supported by:

With funding support from:



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