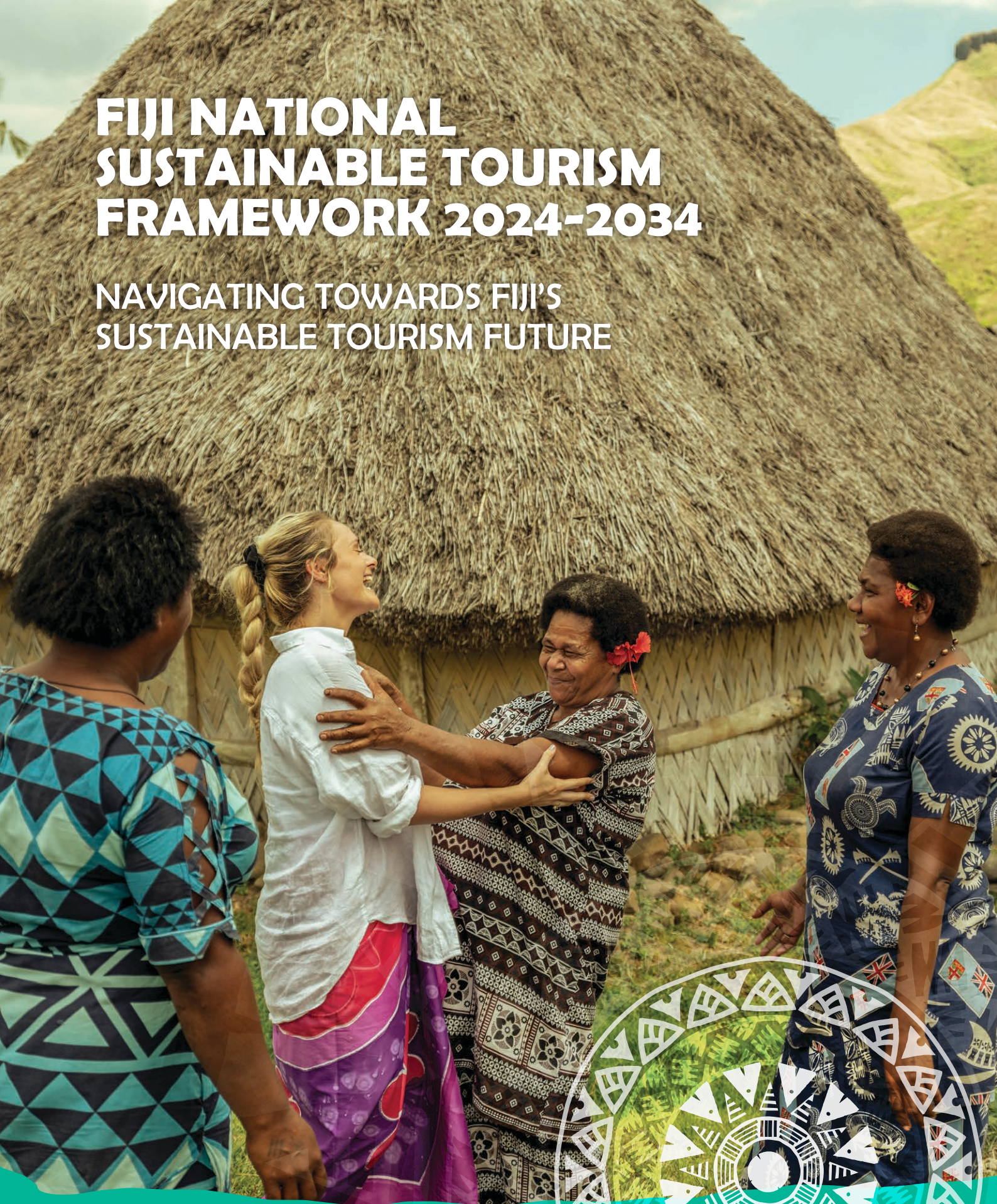


# FIJI NATIONAL SUSTAINABLE TOURISM FRAMEWORK 2024-2034

NAVIGATING TOWARDS FIJI'S  
SUSTAINABLE TOURISM FUTURE



Ministry of  
Tourism and  
Civil Aviation

## ACKNOWLEDGEMENTS

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### Supported by:



*Creating Markets, Creating Opportunities*

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## ACRONYMS

<b>FID</b>	Fiji Immigration Department
<b>EFL</b>	Energy Fiji Limited
<b>FAC</b>	Fiji Arts Council
<b>FBoS</b>	Fiji Bureau of Statistics
<b>FCEF</b>	Fiji Commerce and Employers Federation
<b>FIDA</b>	Fiji Islands Dance Association
<b>FPRA</b>	Fiji Performing Rights Association
<b>FRCS</b>	Fiji Revenue Customs Service
<b>GSTC</b>	Global Sustainable Tourism Council
<b>IF</b>	Investment Fiji
<b>IFC</b>	International Finance Corporation
<b>MSME</b>	Micro, Small and Medium Enterprise
<b>MFSPNDS</b>	Ministry of Finance, Strategic Planning, National Development and Statistics
<b>MMEASI</b>	Ministry of Multi-Ethnic Affairs and Sugar Industry
<b>MPE</b>	Ministry of Public Enterprises
<b>MRMDDM</b>	Ministry of Rural and Maritime Development and Disaster Management
<b>MTACHA</b>	Ministry of iTaukei Affairs, Culture, Heritage and Arts
<b>MTCA</b>	Ministry of Tourism and Civil Aviation
<b>MTCMSMEC</b>	Ministry of Trade, Co-operatives, Micro, Small and Medium Enterprises and Communications
<b>NTF</b>	National Trust of Fiji
<b>NTSF</b>	National Sustainable Tourism Framework
<b>PSTPF</b>	Pacific Sustainable Tourism Policy Framework
<b>RoC</b>	Registrar of Companies
<b>RBF</b>	Reserve Bank of Fiji
<b>SDG</b>	Sustainable Development Goal
<b>SME</b>	Small and Medium Enterprise
<b>SPREP</b>	Secretariat of the Pacific Regional Environment Programme
<b>SIDS</b>	Small Island Developing States
<b>SPTO</b>	Pacific Tourism Organisation
<b>TF</b>	Tourism Fiji
<b>TLTB</b>	iTaukei Land Trust Board
<b>TRT</b>	Tourism Recovery Team
<b>UNEP</b>	United Nations Environment Programme
<b>UNFCCC</b>	United Nations Framework Convention on Climate Change
<b>VAVA</b>	Viti Association of Visual Arts
<b>WAF</b>	Water Authority of Fiji

# FOREWORD

## DEPUTY PRIME MINISTER AND MINISTER FOR TOURISM AND CIVIL AVIATION

*“By 2034, our sustainable, thriving and inclusive tourism sector promotes community wellbeing, provides equitable opportunities, and restores and protects our unique cultural heritage and biodiversity.”*

I am pleased to present the National Sustainable Tourism Framework (2024-2034), our shared vision for the Fijian tourism industry.

At the heart of this vision is the collective views and desires of what we want for, and from, tourism in the next ten years.

For years, Fiji’s Tourism industry has been the bedrock of the economy – contributing close to a third of national Gross Domestic Product. We now have the opportunity to reshape and capitalize on the immense potential tourism brings.

Our people desire a Tourism industry that promotes a prosperous visitor economy, creates thriving and inclusive communities, encourages visible and valued cultures and ensures healthy islands and oceans.

Our commitment to the future of tourism is woven into the fabric of this Framework – underpinned by principles and values that will guide the way in which we will collectively implement the NSTF.

This strategy is rooted in the principles of sustainability, resilience, and inclusivity. We envision a tourism landscape where the benefits are shared equitably, where the natural beauty and cultural richness of our nation is preserved for generations to come, and where the industry serves as a catalyst for positive change.

I take this opportunity to thank all those who have contributed to the creation of this Framework—whether through their expertise, dedication, or passion for sustainable tourism. This is a collective effort, and its success depends on the commitment and partnership of all stakeholders involved.

I look forward to seeing the fruition of our work together.

Sincerely,

**Hon. Viliame Gavoka**



# EXECUTIVE SUMMARY

## Fiji National Sustainable Tourism Framework

The Fiji National Sustainable Tourism Framework 2024 to 2034 presents the collective vision and goals of the Fijian tourism industry. It outlines the overarching vision of transforming the 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, consisting of a 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.

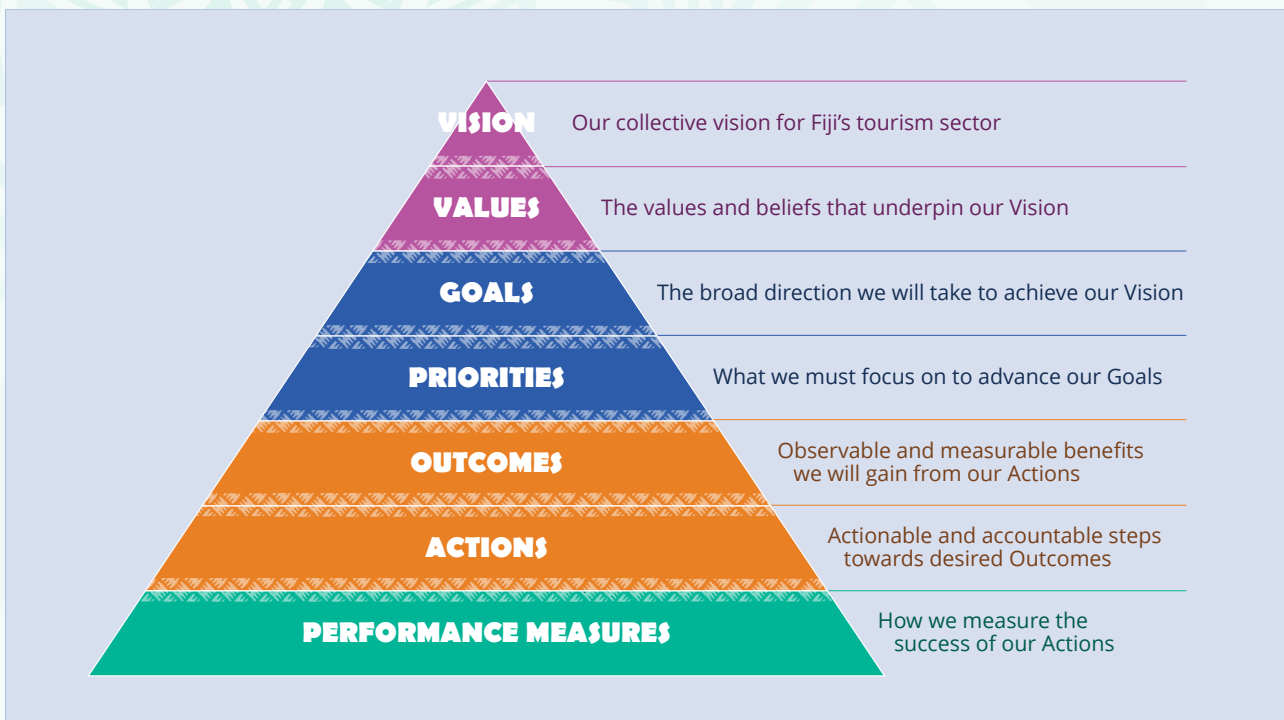
The design of the NSTF is based on thorough research, qualitative and quantitative evidence, and recommendations from the 2023 National Economic Summit and the 2023 Fiji Tourism Convention. It reflects broad stakeholder consultations and feedback from tourism and tourism-related industries, government, civil society, communities, and development partners.

The report [SETTING A STRATEGIC FOUNDATION](#)<sup>1</sup> captures key findings that lay the foundation for the priorities that underpin our tourism vision.

## Structure and hierarchy

The audience of the National Sustainable Tourism Framework 2024-2034 is primarily national, 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 (to be developed from the Framework) will be accompanied by a Monitoring, Evaluation and Learning Framework 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.



1 <https://mcttt.gov.fj/wp-content/uploads/2023/12/NSTF-Phase-A.pdf>

## Our Vision for tourism

**By 2034, our sustainable, thriving and inclusive tourism sector promotes community wellbeing, provides equitable opportunities, and restores and protects our unique cultural heritage and biodiversity.**

- 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 (solidarity, unity, social cohesion) built on mutual trust and respect, recognising the importance of the diverse roles and responsibilities of everyone involved in tourism.

## Goals and Priorities

The NSTF has four Goals, derived from the [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. To realise the NSTF's vision, ten Fiji-specific Priorities that align with the four Goals 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
- ix. Build resilience to climate change and transition to a low-carbon sector

From these Priorities, desired observable and measurable benefits have been articulated as Outcomes. Actionable and accountable steps toward achieving these Outcomes have been identified and detailed in an initial three-year Action Plan (2024-2027). The Action Plan provides solutions to key challenges and identifies strategic actions required to ensure a sustainable future for the sector, one that has the economic and social well-being 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.

\*<https://southpacificislands.travel/pacific-sustainable-tourism-policy-framework/>

# EXECUTIVE SUMMARY

## Fiji National Sustainable Tourism Framework (NSTF) – Vision, Goals and Priorities







# - 1 -

## BACKGROUND

The design of the NSTF is based on thorough research, qualitative and quantitative evidence, and recommendations from the 2023 National Economic Summit and the 2023 Fiji Tourism Convention. It reflects 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 was set to reach a value of USD9.5 trillion, a recovery of 95 percent over pre-pandemic 2019 levels, 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 World Travel & Tourism Council 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 929,740 in 2023, Fiji's highest annual arrivals ever, reflecting 104 percent of 2019 numbers, with an estimated tourism earning of FJD3.3 billion. 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 exceeded pre-COVID level earnings and saw higher per capita spend.

Given its national importance and the continued economic dependency on tourism, the sector's future must be 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 inclusive entrepreneurship.

## 1.2 POSITIONING TOURISM FOR A SUSTAINABLE FUTURE

### What is the framework?

This 10-year National Sustainable Tourism Framework (NSTF) outlines a collective vision for transforming the Fijian tourism sector. It envisages a sustainable future that has the economic and social wellbeing of our people, our ocean, our environment, and our culture at its heart. A future that contributes to the overall development priorities of the current generation without compromising the ability of subsequent 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.

### How was the framework formulated?

The NSTF is based on thorough research, qualitative and quantitative evidence, recommendations from the 2023 National Economic Summit and the 2023 Fiji Tourism Convention, broad stakeholder consultations, and feedback from tourism and tourism-related industries, government, civil society, communities, and development partners. The NSTF also draws upon, and will align with, numerous international, regional and national commitments, policies and frameworks.

### What is the intent of the framework?

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. Tourism must also play 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 the shift to 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 Fiji's refreshed 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.

## 1.3 EMERGING TRENDS, OPPORTUNITIES & CHALLENGES

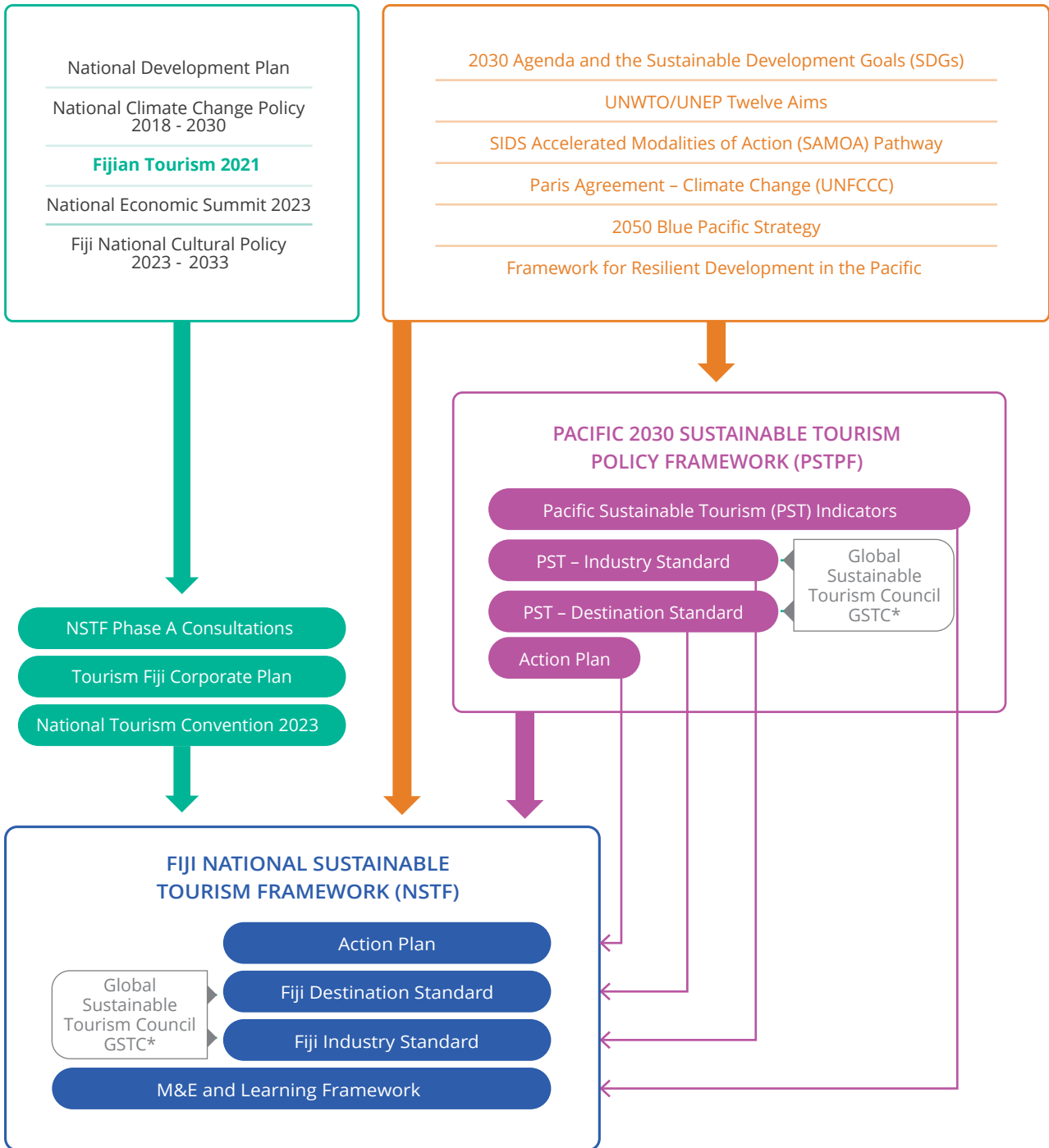
The report [SETTING A STRATEGIC FOUNDATION](#)<sup>2</sup> captures the results of a baseline assessment and the consultations that were held between August 2022 and October 2023, with the following trends, opportunities and challenges identified:

 <p><b>EMERGING TRENDS</b></p>	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						
 <p><b>OPPORTUNITIES</b></p>	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						
 <p><b>CHALLENGES</b></p>	Labour retention		Inadequate 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						

2 <https://mcttt.gov.fj/wp-content/uploads/2023/12/NSTF-Phase-A.pdf>

# 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.



\* The GSTC Criteria are not a policy, but are SDG-aligned and considered to be global best practice

## International policies and frameworks

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

<i>Target 8.9</i>	<i>Target 12.b</i>	<i>Target 14.7</i>
By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.	Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.	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



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



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 as of 2023), 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. In the Pacific, the tourism sector is key to delivering commitments made under the Small Islands Developing States Accelerated Modalities of Action (SAMOA) Pathway, the United Nations Framework Convention on Climate Change (UNFCCC) - the 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 are highlighted as vital for improving and expanding wellbeing opportunities. The tourism sector is also recognised as playing a critical role in creating entrepreneurial opportunities within the creative arts, agriculture, fisheries, construction, retail, and 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). This responds to a growing urgency in the Pacific to transform the tourism sector into one that truly contributes to the sustainable development of our region. Through 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 four PSTPF Goals of Prosperous Economies, Thriving and Inclusive Communities, Visible and Valued Cultures, and Healthy Islands and Oceans have been adopted in 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 regional priorities into nationally led and driven priorities. An indicative Monitoring, Evaluation and Learning Framework is included in the NSTF, however a comprehensive Plan will be developed, aligning with the Pacific Sustainable Tourism Indicators that SPTO is developing under its Pacific Tourism Statistics Strategy.

The SPTO also leads the Pacific Sustainable Tourism Commitment, signed by 19 Pacific Countries (to date) including Fiji, and developed the Pacific Sustainable Tourism Industry Standard and the Pacific Sustainable Tourism Destination Standard, which are GSTC-recognised (Destination) and GSTC-aligned (Industry). These regional mechanisms guide the transformation of the tourism sector in integrating climate and disaster risk, ensuring social inclusion, and generating prosperity for all.

*“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.



## National policies and frameworks

### Fiji National Economic Summit 2023

The Fiji National Economic Summit 2023 highlighted 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:

- the need for climate-resilient infrastructure in different areas of the country, particularly in the rural, northern, and outer islands zones
- the migration of skilled labour
- growing tourism-related investments, particularly in line with Fiji Airways' development strategy and ensuring hotel inventory matches growing flight capacity
- improving sector-specific links to increase Fiji's agricultural outputs and lessen the country's dependency on imports
- greening the existing inventory and infrastructure to meet the sustainability agenda, including recycling and renewable energy
- accelerating business reforms to assist the development, expansion, and creation of new markets or niches by removing legislative bureaucracy
- prioritizing community-based operators and ecotourism.

### Fiji Tourism Convention 2023

The Fiji Tourism Convention deliberations acknowledged the immense contribution of the Fiji tourism industry and its multiplier effect across our economy as the largest foreign exchange earner. The resolutions reaffirmed the industry's commitment to long term goals and targeted actions to stimulate a human-centred, inclusive and sustainable recovery and identify ways to improve the sector's resiliency and sustainability. The Convention noted the importance of having a national tourism framework, that is well integrated with other national and sectoral plans, to expedite an inclusive, sustainable, and resilient tourism recovery for a better future.

### Fiji National Climate Change Policy 2018-2030

The tourism industry has a major role to play in Fiji delivering against the targets of its Nationally Determined Contribution, including for 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 tourism 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. Tourism operators will need capacity building support to climate-sensitize their operations, including uptake of standardised best practice frameworks that will also be explored. 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 Cultural 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. Close collaboration between the Ministry of iTaukei Affairs, Culture, Heritage and Arts and its affiliated agencies (National Trust of Fiji, Fiji Museum, Fiji Arts Council and the iTaukei Institute of Language and Culture) 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. A Fiji Indigenous Tourism Framework that aligns with the NSTF is currently under development. The Framework embraces indigenous ideologies linking to key tourism players while ensuring sustainability.

## Fiji National Development Plan

The Ministry of Finance, Strategic Planning, National Development and Statistics is formulating a new 3-Year and 5-Year National Development Plan (2024-2029) that seeks to strengthen the policy and planning within government, improve coordination, appraisal and selection of public investment projects including climate resilient infrastructure, monitoring and evaluation of projects and strengthen national workforce planning and economic intelligence analysis. The NSTF 2024-2034 will feed directly into the new National Development Plan.





# - 2 -

## VISION AND VALUES

The NSTF reflects the shared vision of a 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 those 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 that our tourism sector reflects this diversity. Our collective success is underpinned by partnerships between a strong private sector, institutional and private investors, financial institutions, micro, small and medium enterprises, our communities and public sector agencies.

Embodying our value of solesolevaki - solidarity, unity, social cohesion - the success of our sector and its ability to deliver benefits for all depends on many people working together to achieve a common purpose. This Framework is not a government Framework. It is the Framework for 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 a sector that maximises its positive impacts for our communities, cultures and environment.

The COVID-19 crisis showed how critical the sector is for our economy and prompted reflection 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 the capacity of our businesses to manage the most extreme shocks.

Our collective Vision for tourism is:



**BY 2034, OUR SUSTAINABLE,  
THRIVING AND INCLUSIVE TOURISM  
SECTOR PROMOTES COMMUNITY  
WELLBEING, PROVIDES EQUITABLE  
OPPORTUNITIES, AND RESTORES  
AND PROTECTS OUR UNIQUE  
CULTURAL HERITAGE AND  
BIODIVERSITY.**

## 2.2 TWELVE AIMS FOR SUSTAINABLE TOURISM

UN Tourism and UNEP have identified twelve aims for sustainable tourism to which the Pacific Sustainable Tourism Policy Framework, the Pacific Sustainable Tourism Standards, the Sustainable Development Goals and the NSTF Goals all align.

<p><b>Economic Viability</b></p> <p>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>1</p> <p>2</p>	<p><b>Local Control</b></p> <p>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>1</p> <p>2</p>	<p><b>Employment Quality</b></p> <p>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>1</p> <p>2</p>
<p><b>Social Equity</b></p> <p>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>2</p>	<p><b>Visitor Fulfilment</b></p> <p>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>2</p>	<p><b>Local Prosperity</b></p> <p>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>2</p>
<p><b>Community Wellbeing</b></p> <p>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>2</p>	<p><b>Cultural Richness</b></p> <p>To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.</p>	<p>3</p>	<p><b>Physical Integrity</b></p> <p>To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.</p>	<p>4</p>
<p><b>Biological Diversity</b></p> <p>To support the conservation of natural areas, habitats and wildlife, and minimise damage to them.</p>	<p>4</p>	<p><b>Resource Efficiency</b></p> <p>To minimise the use of scarce and nonrenewable resources in the development and operation of tourism facilities and services.</p>	<p>4</p>	<p><b>Environmental Purity</b></p> <p>To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.</p>	<p>4</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. These are applicable to all who call Fiji home, including our visitors with whom we share our home.

We are located in the heart of the Pacific, sharing ancestry beyond the region. 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, minds 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 learn and contribute to regional and global partnerships, benefitting from lessons and opportunities. Within communities, solesolevaki also often underpins the way many communities work together to develop and manage community-based enterprises founded on these values.

Solesolevaki is inclusive of other values such as veiwakani - the care and respect with which we nurture relationships with people and the environment. This is not limited to family and encompasses the whole society, those in Fiji and abroad. For us this means, taking care of our land and our guests as though they are our family. In return, we seek the same care and respect of our customs and values.

### Na yalo ni veivakaturagataki - A respectful spirit

*Veivakaturagataki* involves carrying out traditional practices showing respect to the land, people, culture and its ancestors. It emphasises respect, love, care and selflessness.

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

This value is important in ensuring that all stakeholders in the industry are working respectfully and harmoniously. We treat each other and our guests with respect. In our communities we share our cultural practices and way of life with our guests, while they reciprocate by showing respect to our communities.

### Na yalo ni veiqaravi - A heart for service

*Veiqaravi* or service - is an essential part of our tourism sector. As Fijians, we are renowned for our natural warmth and bula spirit. This value underpins the importance of providing genuine hospitality to our guests.

We collectively serve with passion, warmth and dedication to ensure our goals, priorities and objectives are achieved.



- 3 -

# GOALS AND PRIORITIES

# GOAL 1: PROSPEROUS VISITOR ECONOMY

## Tourism supports a prosperous and resilient economy

### Priority 1.

Create an enabling policy environment and regulatory coherence

#### Outcomes

- Sustainable tourism is inclusive, effectively planned and coordinated, policy reforms are accelerated, and the coherence of the policy environment gives clarity and certainty for all operators and investors
- An improved evidence base for active monitoring of the value of tourism and its impacts supports tracking of tourism sustainability and recalibration of priorities as needed for responsible destination management

### Priority 2.

Nurture sustainable investments

#### Outcomes

- Tourism stakeholder risk management capability is strengthened, supporting sector resilience
- National sustainable tourism standards help accelerate sustainable tourism development, providing clear guidance for products, experiences and investments on nurturing sustainable tourism enterprises and attracting responsible visitors
- Strengthened partnerships between resource owners and domestic and international investors support the ongoing localisation of tourism investment

### Priority 3.

Create a competitive destination with diverse experiences

#### Outcomes

- Increased numbers of MSMEs, and women, youth, gender-diverse, mataqali and community-led tourism enterprises thrive
- Increased investment in roads, airports, wharves, jetties, renewable energy, water, connectivity, communications and infrastructure promotes the diversification and dispersal of tourism products and experiences and the realisation of sustainable tourism investments in remote areas
- Higher value visitors, diverse geographic source markets and new niche market segments are targeted to maximise economic, social, environmental and cultural sustainability

## PRIORITY 1:

### Create an enabling policy environment and regulatory coherence

To be sustainable as a cross-cutting sector, tourism must be coherently planned and managed, with strengthened coordination and increased institutional capacity. Multiple policy areas must be integrated to achieve coherence across diverse legislations, policies and guidelines, and to support government, industry and communities to protect the natural and cultural assets upon which tourism depends.

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 intersect with the tourism sector. The creation of a Tourism Act would assist by assigning MTCA institutional authority appropriate to the importance and intersections of the sector. A Tourism Act could introduce an integrated approach to developing, managing and promoting tourism, house national sustainable tourism standards, and update the respective roles and responsibilities of the Tourism Department and Tourism Fiji.

The Ministry of Trade, Co-operatives, Micro, Small and Medium Enterprises and Communications (MTCMSMEC) similarly plays a vital coordination role in championing regulatory reforms to support business development, with a wide range of government agencies and actors also involved in the policies and regulations that impact the tourism sector. As an overarching priority reflected across 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 relevant 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 (past and forthcoming), the Green Growth Framework, the Climate Change Act 2021, and the National Ocean Policy 2020-2030. The development of national sustainable tourism standards to promote sustainable tourism development, aligned to the Global Sustainable Tourism Council (GSTC) and the Pacific 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, as economic indicators alone are insufficient to track an expanded definition of progress. The evidence base needs to be strengthened to provide decision makers and investors with accurate, holistic and timely information. Against the backdrop of worsening climate and disaster risks, there is also a need to strengthen risk management capabilities within the sector to support sector resilience.

Regulatory requirements relevant to the tourism sector must be streamlined at the operational level. 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 on specific rules or requirements in an ad-hoc manner. Proposed policy reforms that would reduce barriers to entry for small and community-led businesses must be accelerated to promote tourism diversification and strong tourism value chains.

Sector resilience will be supported by 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. Improving the guidance available to new and existing operators and investors (including tourism's wider value chain), via online portals, 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 within these institutions would help them become cognizant of how important their role is in the bigger picture of Fiji's economic development.



## PRIORITY 2:

### Nurture sustainable investments

The private sector is increasingly aware of the importance guests place on sustainability measures 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 and ventures that are consistent with sustainable tourism growth and should be nurtured. A stable and improved regulatory environment and expanded partnerships will promote the diversification of tourism investments and support 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 national sustainable tourism standards at both destination and industry levels, leveraging the GSTC-aligned Pacific Sustainable Tourism Destination and Industry Standards. This will necessitate greater coordination across government and industry to embed sustainability across all aspects of tourism planning, development and management. Adapting regional standards to the Fiji context provides a cost-effective option for destination and operator benchmarking, accelerating implementation of sustainability commitments and facilitating ongoing tracking. Regulatory requirements will be reviewed and modernized where necessary, with current requirements and processes cross-referenced within the national sustainable tourism standards. The Fiji Code of Conduct for Tourism Service Providers will be integrated into the standards and further socialised with industry.

A coordinated and focused investment promotion strategy will support ongoing localisation of tourism investments, attracting financiers, investors and consumers who share Fiji's sustainable tourism values. As the tourism industry increases room inventory to support anticipated growth, investment must be aligned to not only the economic, but the environmental, social, and cultural Goals of the NSTF. These broader policy objectives will be embedded within the investment promotion strategy and fiscal incentives reviewed to attract the desired investment. The NSTF advocates for 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, low impact 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 recognises and builds on ongoing reforms to support sector digitisation and streamline approval processes that can in turn unlock a significant pipeline of tourism investments. An Investment Facilitation Committee, an inter-ministerial body under the Ministry of Trade, Co-operatives, Micro, Small and Medium Enterprises and Communications, has been established to support the streamlining of investment-related processes.

Smaller entities tend to struggle to obtain finance to scale, relying instead on internal sources of funds for any growth. There is a well-recognised gap in the financing options available for MSMEs. As they typically have limited or informally documented track records, and little to no "acceptable" collateral or equity contributions to make towards the loan, MSMEs have considerable difficulty in obtaining finance from the formal financial sector. The action plan will identify suitable sources of finance for smaller businesses that may find it difficult to access finance. A pipeline of lower-environmental impact businesses looking to scale or replicate in other locations can be identified and matched with investment interest.

## PRIORITY 3:

### Create a competitive destination with diverse experiences

Tourism is concentrated in the Coral Coast-Nadi-Denarau-Mamanuca-Yasawas corridor with experiences mainly ocean-based. These areas will continue to attract investors as foundational tourism infrastructure (airports, roads, transport, ports) is already in place, lowering the cost of construction and providing 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. Investment in roads, airports, wharves, jetties, renewable energy, water, connectivity, communications and digital infrastructure will reduce capital investment needed by investors, increase viability of more remote areas of the country, and support the digitisation of the sector. Coordination among agencies will be critical to ensure MTCA and other relevant stakeholders are aware of the pipeline of infrastructure investments needed to support tourism development.

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 understand the market opportunities available, and opportunities socialised through strengthened partnerships between public and private sector business advisory networks. Addressing barriers to accessing opportunities requires support for women, youth, gender-diverse, mataqali and community-led tourism enterprises to access markets and thrive within tourism value chains.

Fiji continues to rely on its traditional source markets of Australia and New Zealand, as well as the United States for the bulk of visitors. In 2023, 47 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 in the effort to diversify the customer base and generate greater revenue and in-country tourism spend. Investments in inter-island/domestic connectivity and tourism infrastructure are essential to spread visitor flows.

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 consumers indicating that the physical and mental health benefits of travel have become more important in their travel decisions. Fiji also has the potential to develop and benefit from medical tourism in the region. Over the years, Fiji has also made significant investments in promoting Fiji as a sports tourism destination having hosted top tier events. The success of these international and local events relies on private sector partnership and sports infrastructure to maximise return to the local economy. Developing these experiences and markets further in Fiji could help to attract a different demographic of responsible travellers, whilst providing products, services and infrastructure that are gender and disability inclusive can help position Fiji as a destination of choice for travellers with these considerations.

Other 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, with lower environmental impact. This could include marinas and yachting, targeted remote working properties, short-term accommodation rentals and the apartment market. Specific marketing and promotion of these segments, with support of Government and Tourism Fiji, will increase the revenue derived from niche, high-value, markets. Efforts will continue to maximise benefits from larger cruise ship visits, including stronger linkages to SMEs and diversification of both experiences and locally-made products.

## GOAL 2: THRIVING AND INCLUSIVE COMMUNITIES

Tourism empowers and improves the wellbeing of our communities

### Priority 4.

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

#### Outcomes

- A whole-of-society approach to tourism planning ensures greater alignment between tourism development and wider sustainable development goals
- Women, youth, gender-diverse people and people with disabilities are empowered as leaders within the tourism sector

### Priority 5.

Grow experiential and culturally responsible tourism that supports tourism dispersal

#### Outcomes

- Diverse MSMEs, community and iTaukei-led tourism enterprises thrive due to strengthened entrepreneurship coaching and mentoring, and improved access to information and finance
- Culinary and agritourism experiences proudly promote the diversity of Fijian produce and cuisine
- Experiential, culturally immersive and adventure tourism development generates opportunities for public private partnerships and social enterprises

### Priority 6.

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

#### Outcomes

- Employment opportunities, workplace training, professional development exchanges, short term courses and scholarships provide useful connections for emerging professionals and a pipeline of job-ready skills
- Tourism provides fulfilling career pathways and supports tourism professionals to realise their career ambitions

## PRIORITY 4:

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

Sustainable tourism planning and development requires the active involvement of all stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Across government, the involvement of the Ministry of Rural and Maritime Development and Disaster Management, the Ministry of Women, Children and Social Protection, the Ministry of iTaukei Affairs, Culture, Heritage and Arts, and the Ministry of Trade, Co-operatives, Micro, Small and Medium Enterprises and Communications 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. They ensure 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 to ensure that MSMEs strengthen their connection with Tourism Fiji, MSME Fiji and organisations such as Business Assistance Fiji, and leverage them for support and access to networks.

Tourism entrepreneurship training currently happens in a relatively uncoordinated way through a variety of government and development partner incubation and accelerator programs. The NSTF provides direction for supporting tourism entrepreneurs, including women, youth, gender-diverse, mataqali and community-led, 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 Commerce and Employers Federation and others.

The growth of tourism enterprises should be nurtured through exposure and connections to private sector business development service providers that understand the context of balancing business discipline and social and cultural obligation. The NSTF will support greater connection with entrepreneurship support organisations and emerging business advisory networks to grow their knowledge of tourism value chains and provide effective advice and support for existing and new tourism enterprises. Given the maturity of our tourism sector, many Fijians have experience in the industry and are well-placed to start their own enterprises with the right support.

While there has been an increase in business incubation and acceleration programs, these currently reach only a small number of businesses. A growing pool of Fijian business advisers and networks is available in urban centres but tourism-specialised 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 partner with private sector business advisory services to identify demand and increase the availability of services.

Investment Fiji will continue to work closely with Tourism Fiji and MTCA and seek opportunities to connect investment-ready smaller and community-based operators with domestic and international investors.

The measurement of tourism success has historically focused 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 GSTC and Pacific Sustainable Tourism Standards for Destinations and the Pacific Sustainable Tourism Indicators. The Monitoring, Learning and Evaluation Framework for the NSTF will provide the basis for 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 market segments are growing worldwide and iTaukei entrepreneurs, tourism professionals and our diverse communities must be supported to realise the leadership and business opportunities within the tourism sector. 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 have been targeted for product and experience development and investment in the past, 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, for example trusts, companies limited by guarantee, limited liability companies and cooperatives. Critical to supporting iTaukei-owned businesses is the streamlining of processes for leasing mataqali land to mataqali / Land Owning Unit (LOU) members and adjusting agricultural lease conditions to allow agritourism. Entrepreneurs must be supported to identify and develop opportunities that reflect their lived-culture and remain true to their values.

There is a well-recognised gap in financing available for MSMEs, which are the majority of businesses in the experiential and cultural sub-sectors. 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. Coordination between the Ministry of Trade, Co-operatives, Micro, Small and Medium Enterprises and Communications and partners is needed 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 have also created a vacuum in the tourism industry. Many tourism employers now accept that regular on-the-job training and ongoing recruitment is required to offset increased turnover of staff. The tourism industry will adopt best practice human resources policies, in line with Fiji laws, such as the Fiji Employment Act 2007, and incorporating model policies and tools into the national sustainable tourism standards for industry. The best practices will support global commitments such as the UN Compact, including anti-harassment, responses to domestic violence, flexible working, maternity and paternity leave, and career progression.

To be truly resilient and sustainable, all sectors of the tourism and hospitality industry need a pipeline of work-ready human capital, to upskill existing staff and new methods of staff retention. Future training must reorientate towards hospitality training and upskilling tourism roles as a trade, balancing theoretical elements of tourism studies with on-the-job training accordingly. In-house training programs are to be encouraged, supported, and promoted. The NSTF enhances collaboration between employers, academic and training institutions, encourages industry-led professional development programs, 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. Mentoring opportunities between larger and smaller operators and peer-to-peer learning opportunities between smaller and community-based operators will be encouraged to strengthen capacity and facilitate mutual learning.

Future development of training programs will be based on private-sector guided market demand to acknowledge the diversity of career opportunities within the tourism sector - for example marine biologists, climate specialists, farmers, electricians and 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 needed to empower, motivate and 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. To maximize its effectiveness, there is a need to review the levy.

## GOAL 3: VISIBLE AND VALUED CULTURES

Tourism amplifies and promotes our culture and heritage

### Priority 7.

Protect and promote our diverse cultures and traditions

#### Outcomes

- The strong, diverse foundation of Fiji's people, environment, society and culture is protected and celebrated
- Public-private partnerships promote and safeguard cultural heritage
- The authenticity of our tangible and intangible cultural resources is safeguarded and cherished, reducing the distortion of our cultural norms and values

### Priority 8.

Enable prosperous and creative industries

#### Outcomes

- Cultural diversity and creative entrepreneurship are encouraged and valued



## 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 3,000 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 which are 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 criteria within the national sustainable tourism standards. Investment promotion strategies will integrate a stronger cultural lens to ensure investments are compatible with this priority.

Tangible heritage, such as heritage sites, sacred places and historical landmarks, plays a crucial role in safeguarding and showcasing the rich tapestry of Fiji's diverse cultures and traditions. Villages as cultural heritage precincts contribute spaces that create an authentic cultural experience for visitors. The careful management of tangible heritage will ensure that these assets remain resilient in the face of environmental challenges and the passage of time. Fiji can leverage its cultural wealth to create authentic and memorable experiences for tourists while fostering a sense of identity and belonging amongst our people.

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 national sustainable tourism standards will draw from the Code of Conduct for Tourism Service Providers and take guidance from the Ministry of iTaukei Affairs, Culture, Heritage and Arts to ensure that operators and guests deepen their knowledge and understanding of Fijian culture. Cultural criteria will be implemented, to improve the representation of culture within the tourism sector. 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, and tourism stakeholders 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.

The NSTF will support the improvement in the cultural 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. A host country perception study will be developed to improve the availability of information. 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. The reinstatement of the Roko Tui Saravania and the translation of the Code of Conduct and other guidance material will support Provincial Office staff to provide communities with updated information and guidance on the tourism sector. Storytelling is a core component of guiding and guides must provide 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 align with the cultural tourism best practices and the Fiji National Cultural Policy targeting visitors that are a good fit for our culture and communities.



## PRIORITY 8:

### Enable prosperous and creative industries

Our people are creative and produce a wide range of cultural artefacts, products and performances. Culture is a driver and an enabler in the creative industry, and therefore, industries can foster space and opportunities to sustain traditional skills and enhance knowledge. The crafts, skills and knowledge are bountiful because they act as a medium to honor the chiefly household, strengthen old alliances, and/or promote solidarity in the vanua. The transmission of this to the next generation is vital as not only the tangible aspect is promoted, but the intangible elements are also safeguarded.

An increase in retail visibility and fit-for-purpose promotional opportunities is important to protect the traditional elements to which visitors are attracted. Dedicated initiatives to protect and promote traditional crafts, skills and knowledge will help sustain culture and cultural elements in creative industries. Combining aspects of indigenous knowledge with contemporary creativity can support innovation and entrepreneurship within the creative industries.

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 improving 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.

In some cases, creative performances portray dances from other Pacific Island Countries as traditional Fijian, compromising the overall experience and authenticity. 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 can play a more active role in creating opportunities for new and emerging artists. Strengthened partnerships between hotel brands, tourism associations, architects and interior designers will support the promotion of Fijian architecture, art and suppliers within the industry. The creative industries can provide opportunities for the revival of traditional arts and stable employment opportunities for artists.

Creating a more inclusive and sustainable approach to heritage management is essential. Public-private partnerships are vital and private sector involvement must be encouraged, including developing incentives for private businesses to invest in projects that promote cultural diversity and inclusivity.

## GOAL 4: HEALTHY ISLANDS AND OCEANS

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

### Priority 9.

Strengthen protection of our islands, coastal and ocean ecosystems

#### Outcomes

- Tourism provides a demonstration case to other sectors for mainstreaming social and cultural sustainability
- Sustainability principles and existing climate, environmental and biodiversity commitments are integrated into future tourism investment strategies and planning guidelines
- Partnerships are strengthened between conservation organisations, communities and tourism operators
- Waste management practices are measured, managed and improved, with less waste production, increased recycling and incorporation of more reusable materials
- Visitors are engaged in sustainability measures

### Priority 10.

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

#### Outcomes

- Decarbonisation and the transition to carbon neutral energy are accelerated in the tourism and transport sectors
- Key climate change threats to natural capital and infrastructure are reduced
- New financing instruments leverage public and private investment targeting sustainability initiatives
- Resilience is strengthened through an institutionalised, holistic and intentional approach to risk management

## 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 to 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 (once enacted), 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. Fiji is a signatory to various international conventions including the United Nations Framework for Action on Climate Change. Meeting these targets will require all sectors of the economy to transition to a greener, more sustainable and resilient pathway. 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.

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. Whilst tourism can play a critical role in promoting environmental conservation, visitors can have significant negative impacts if not well managed. Our beaches, oceans, rivers and forests that attract tourists can 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. The sustainable tourism standards will include guidance on best practices for engaging with wildlife and sensitive environments. 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.

The NSTF directs the integration of sustainability principles and existing climate, environmental and biodiversity commitments into future investment strategies and planning guidelines, to support the shift required in the tourism industry's trajectory and guide future tourism development. The national sustainable tourism standards will integrate sustainability commitments, providing a guide on expectations for 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 in 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 playing a key role in their preservation. 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 essential waste management infrastructure and investment, 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 accelerating 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. Becoming a net-zero society will require every sector, including tourism and its extended supply chain, to accelerate climate action by transitioning to renewable energy, electric vehicles, improved waste management and localised procurement (including food sources). As climate risks continue to intensify, addressing key threats to natural capital and infrastructure from climate change requires prioritisation of sustainability measures by the tourism sector. Measures must genuinely 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.

Large operators are preparing for climate- and nature-related risk reporting requirements. Fiji's Climate Change Act 2021 (once enacted) requires large companies to include climate risk disclosures in their financial reporting and encourage companies to adopt voluntary emissions reporting. These requirements will 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 increasingly making booking decisions that support their energy, waste and water targets. The NSTF will encourage partnerships between the private sector and civil society to share best practices and new ideas, driving the shift to a new model of sustainable tourism development. Tools and processes must be developed and introduced to facilitate measurement and drive accountability for 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 in support of the decarbonisation of the industry. Connecting tourism development and compliance with national sustainable tourism standards to incentives, 'green' loans and other financing instruments will encourage businesses to make the transition.

Disaster risks are intensifying with the impacts of climate change. The management of, and recovery from, various shocks (political instability, climate and disaster risks including cyclones, floods and 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 essential services in high-volume tourism areas, business diversification and addressing broader social and cultural risks to tourism growth. Institutionalising and strengthening the crisis management systems used during crises such as cyclones and the pandemic would support ongoing coordination and collaboration in managing risks. This includes formalising the Tourism Recovery Team (TRT), which includes government and private sector actors.



# - 4 -

## INDICATIVE MONITORING, EVALUATION AND LEARNING FRAMEWORK

Traditionally, the indicators used to track sectoral performance have been economic-focused rather than measuring tourism more holistically. The NSTF Monitoring, Evaluation and Learning Framework seeks to address this shortcoming by identifying and tracking relevant indicators under all four Goals. Tracking the progress of the tourism sector and the achievement of the NSTF Goals, Priorities and Objectives will require a strong commitment to data and information sharing across agencies, the strengthening of knowledge management systems and inter-agency coordination.

# GOAL 1: PROSPEROUS VISITOR ECONOMY

## Tourism supports prosperous and resilient economies

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

## GOAL 2: THRIVING AND INCLUSIVE COMMUNITIES

### Tourism empowers and improves the wellbeing of our communities

Indicator	Disaggregation	Sources
<b>Accommodation Industry</b> <ul style="list-style-type: none"> <li>No. of businesses</li> <li>No. of beds</li> <li>No. of beds with accessible infrastructure</li> <li>Occupancy rate</li> <li>Employment (by gender)</li> <li>Income (by gender)</li> </ul>	<b>Occupancy rate</b> <ul style="list-style-type: none"> <li>Business Size</li> <li>Type of Accommodation</li> <li>Geographic Location</li> </ul>	Company registration records (RoC) Establishment survey (FBoS)  Tourism Fiji - TF National Accounts, Tourism Satellite Account (FBoS)
<b>Community and visitor perceptions of tourism</b> <ul style="list-style-type: none"> <li>Local community perceptions: Percentage of population supportive of Tourism Development</li> <li>Visitor perceptions: Percentage of International Visitors satisfied with overall experience at destination</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Employment Status</li> <li>Geographic Location</li> <li>Gender</li> <li>Employment Status</li> <li>Country of Residence</li> <li>Destination in Fiji</li> </ul>	Community Surveys (MTCA / TF)  IVS and DVS (MTCA) <ul style="list-style-type: none"> <li>International Visitor Survey</li> <li>Domestic Tourism in Fiji</li> </ul>
<b>Visitor perceptions of inclusivity and accessibility</b> <ul style="list-style-type: none"> <li>Gender</li> <li>Experience in Fiji with disability/ disabilities</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Self-identified disability/ disabilities</li> </ul>	IVS and DVS (MTCA) <ul style="list-style-type: none"> <li>International Visitor Survey</li> <li>Domestic Tourism in Fiji</li> </ul>
<b>Tourism income distribution</b> <ul style="list-style-type: none"> <li>Local</li> <li>International</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Age</li> <li>Ethnicity</li> <li>Average salary</li> <li>Education level</li> </ul>	Household Income and Expenditure Surveys, Population Census (FBoS) National Accounts (FBoS)
<b>Tourism Employment</b> <ul style="list-style-type: none"> <li>Percentage of Tourism Employment to Total Employment</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Formal and Informal Sector</li> <li>Industry</li> <li>Workers with a Disability</li> <li>Local and Expatriate Workers</li> <li>Geographic Location</li> </ul>	Employment surveys, Tourism Satellite Account (FBoS) Immigration records (FRCS/FID) Informal economy research
<b>Tourism Intensity</b> <ul style="list-style-type: none"> <li>Number of International Visitors per 100 residents</li> </ul>	<ul style="list-style-type: none"> <li>Destination in Fiji</li> </ul>	Passenger cards and Airline/Cruise Ship Manifests (FRCS/FID) National census (FBoS)
<b>Tourism Seasonality</b> <ul style="list-style-type: none"> <li>International Visitors Seasonality Ratio</li> </ul>	<ul style="list-style-type: none"> <li>Destination in Fiji</li> </ul>	

## GOAL 3: VISIBLE AND VALUED CULTURES

Tourism amplifies and promotes our culture and heritage

Indicator	Disaggregation	Sources
<b>Visitors (international and domestic)</b> <ul style="list-style-type: none"> <li>Cultural activities</li> <li>Cultural expenditure</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Geographic location</li> </ul>	IVS and DVS (MTCA) <ul style="list-style-type: none"> <li>International Visitor Survey</li> <li>Domestic Tourism in Fiji studies</li> </ul> Tourism earnings (FBoS)
<b>Community perceptions of tourism</b> <ul style="list-style-type: none"> <li>Local community perceptions</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Employment Status</li> <li>Geographic Location</li> </ul>	Community Surveys (MTCA / TF)
<b>Public-Private Partnerships</b> <ul style="list-style-type: none"> <li>Number of PPPs established for cultural/ indigenous tourism</li> </ul>	<ul style="list-style-type: none"> <li>International and domestic stakeholders</li> <li>Type of investment activity</li> <li>Total investment</li> <li>Direct and indirect beneficiaries from partnership</li> </ul>	Investment Fiji (IF) iTaukei Land Trust Board (TLTB) Annual reports Government Finance reports Ministry of Trade, Commerce, MSMEs and Communication (MTCMSMEC) Ministry of Public Enterprises (MPE)
<b>Cultural Activity</b> <ul style="list-style-type: none"> <li>Number of registered artists, musicians, performers or craftspeople participating in tourism activities/sector</li> </ul>	<ul style="list-style-type: none"> <li>Cruise ships</li> <li>Accommodation</li> <li>Experiences/tour products</li> <li>Events</li> <li>Architecture and interior design</li> </ul>	TF Fiji Arts Council - FAC Fiji Performing Rights Association - FPRA Viti Association of Visual Arts - VAVA Fiji Islands Dance Association - FIDA
<b>Heritage Sites</b> <ul style="list-style-type: none"> <li>Number of heritage sites available to visit</li> </ul>	<ul style="list-style-type: none"> <li>Significance (cultural / natural / mixed)</li> <li>Type (UNESCO World Heritage / national heritage)</li> </ul>	National Heritage Register National Trust of Fiji - NTF Fiji Museum



## GOAL 4: HEALTHY ISLANDS AND OCEANS

Tourism accelerates climate action, protects our ecosystems and supports resilience

Indicator	Disaggregation	Sources
<b>Energy use</b> <ul style="list-style-type: none"> <li>Percentage of Tourism Accommodation Businesses using Renewable Energy</li> <li>Electricity use in Tourism Accommodation Establishments per International Visitor Night</li> </ul>	<ul style="list-style-type: none"> <li>Business Size</li> <li>Non-renewable and renewable electricity used</li> <li>Geographical Location</li> </ul>	Environmental accounts (FBoS)  Establishment survey (FBoS)  Energy Fiji Limited (EFL)
<b>Water use</b> <ul style="list-style-type: none"> <li>Water Use in Tourism Accommodation Establishments per International Visitor Night</li> </ul>	<ul style="list-style-type: none"> <li>Geographical Location</li> <li>Business Size</li> </ul>	Water Authority of Fiji (WAF)
<b>Emissions</b> <ul style="list-style-type: none"> <li>GHG emissions in Tourism Accommodation Establishments per International Visitor Night</li> </ul>		
<b>Waste</b> <ul style="list-style-type: none"> <li>Solid Waste Generated per International Visitor Night</li> </ul>		
<b>Tourism Density</b> <ul style="list-style-type: none"> <li>Number of International Visitors per hectare of Habitable Land</li> </ul>	<ul style="list-style-type: none"> <li>Geographical Location</li> </ul>	National Heritage Register National Trust of Fiji - NTF Fiji Museum
<b>Terrestrial Condition</b> <ul style="list-style-type: none"> <li>Type of Protected Area</li> <li>Number and extent of protected areas</li> <li>Percentage of protected areas</li> <li>Expenditure / Investment on environmental activities undertaken by tourism industries</li> </ul>	<ul style="list-style-type: none"> <li>Geographical Location</li> </ul>	Protected Areas Committee Conservation organizations  Secretariat of the Pacific Regional Environment Programme (SPREP) Pacific Islands Protected Area Portal
<b>Marine Condition</b> <ul style="list-style-type: none"> <li>Type of Protected Area</li> <li>Number and extent of protected areas</li> <li>Percentage of protected areas</li> <li>Expenditure / Investment on environmental activities undertaken by tourism industries</li> </ul>	<ul style="list-style-type: none"> <li>Sea Water Quality</li> <li>Index of coastal eutrophication and plastic debris density</li> <li>Average marine acidity (pH) measured at agreed suite of representative sampling stations</li> </ul>	
<b>Visitors (international and domestic)</b> <ul style="list-style-type: none"> <li>Nature tourism</li> <li>Marine tourism</li> </ul>	<ul style="list-style-type: none"> <li>Gender</li> <li>Country of Residence</li> <li>Purpose of Visit</li> <li>Destination in Fiji</li> </ul>	IVS and DVS (MTCA) <ul style="list-style-type: none"> <li>International Visitor Survey</li> <li>Domestic Tourism in Fiji (MTCA)</li> </ul>



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