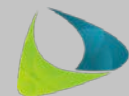
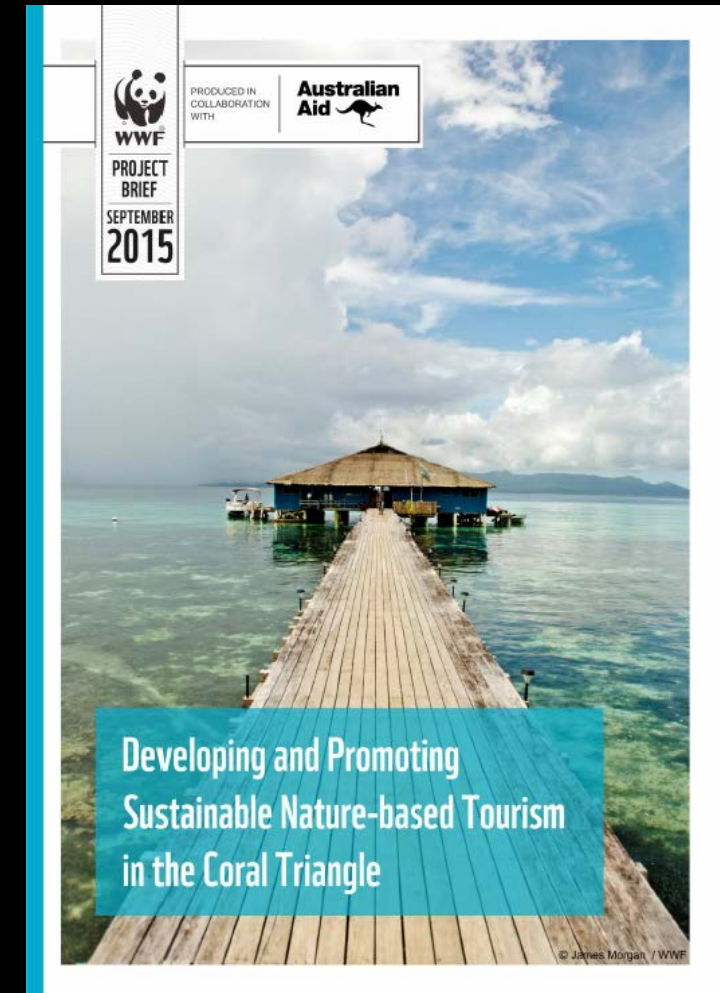


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Developing & Promoting Sustainable Nature Based Tourism in the Coral Triangle

This two-year initiative is being implemented by WWF through funding from the Australian Government

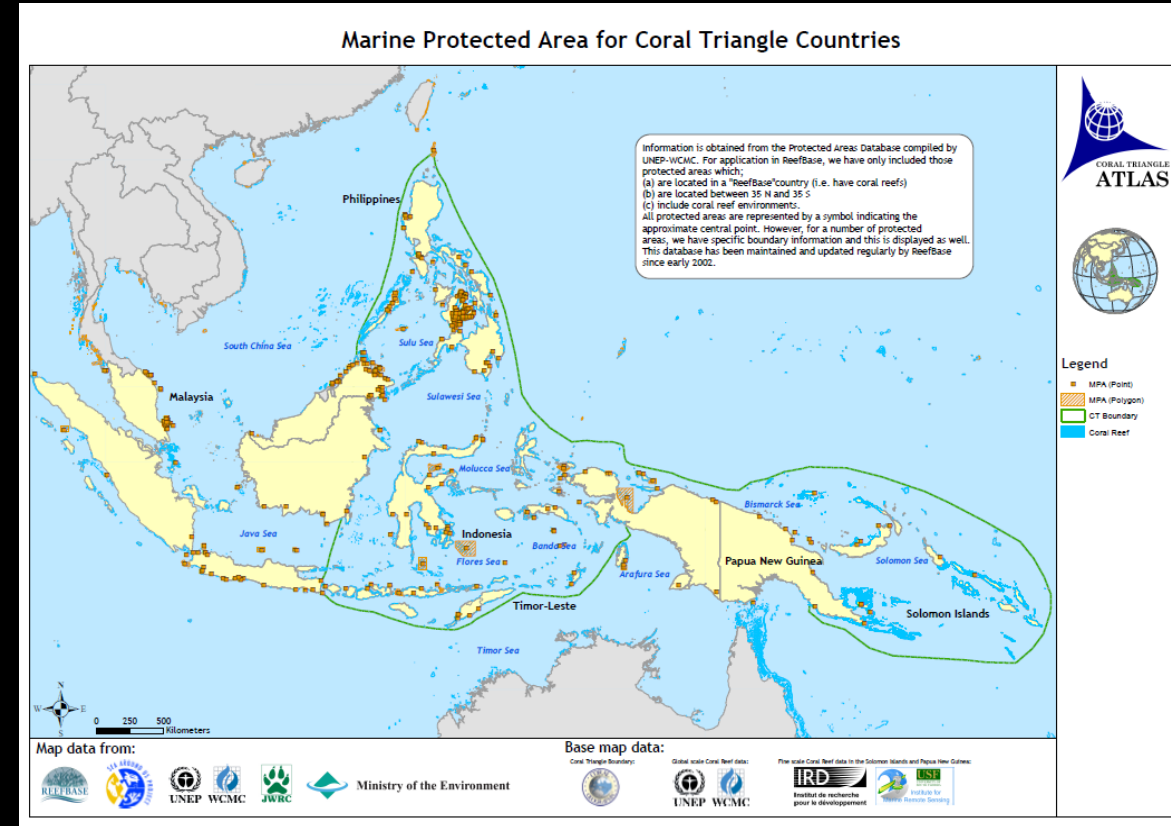
Commenced in 2015, it aims to assist the six countries of the CTI-CFF in **regional collaboration** for **acceleration** of achievements of regional and national marine conservation goals <http://coraltriangleinitiative.org/>



**CORAL TRIANGLE
INITIATIVE**
ON CORAL REEFS, FISHERIES AND FOOD SECURITY

Aims of the project

- Build support for protecting CT natural and cultural assets
- Enhance the value of tourism to local, regional and national economies in the CT region
- Increase the role of Marine Protected Areas in those economies and local communities
- Promote world class, high quality visitor experiences



Objectives of the Session

1. To learn from country representatives their thoughts and experiences of how investments in their destinations (and groups of destinations, such as key areas of conservation value in the Coral Triangle) could support community development, economic growth and conservation.
2. To discuss ideas on how the different marine tourism sectors (airlines, resorts, live aboard, divers etc) could be engaged / involved in such collaborative effort.
3. To consider enabling conditions for investments in sustainable tourism development.

Country visions

- Timor-Leste
- Papua New Guinea
- Solomon Islands





Tourism Vision



Ministry of Tourism, Arts and Culture of Timor-Leste



Independence: 20 May 2002

Official Name: Democratic Republic of Timor-Leste

Official Languages: Portuguese and Tetúm

Currency: US dollar (US\$)

Total Population: 1.17 million

Natural Resources: Petroleum, natural gas, gold, & marble



Overview of Tourism Development

Government Strategic Development Plan 2011-2030:

- Petroleum
- Tourism
- Agriculture
- Fisheries
- Manufacturing

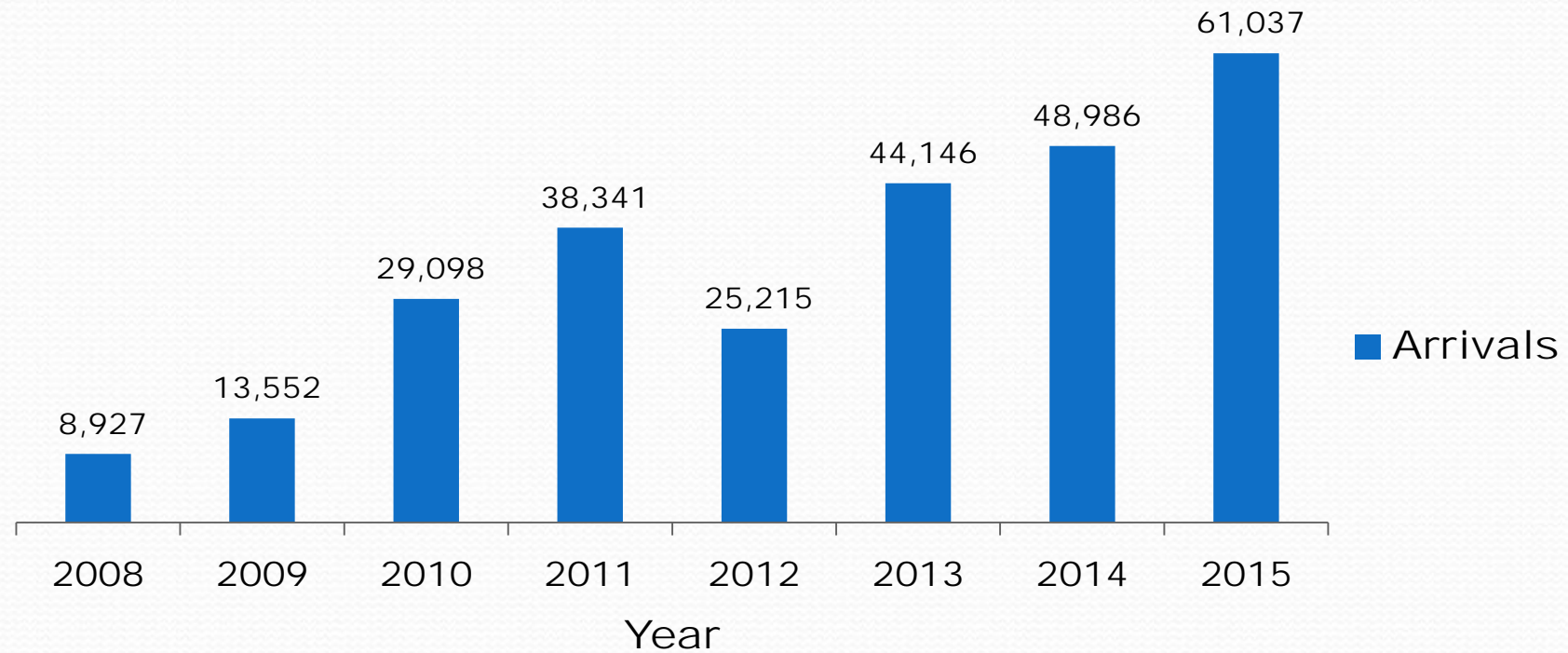


Tourism Vision:

“A dynamic, competitive and profitable industry, which makes a vital and increasing contribution to the sustainable economic, socio-cultural, and environmental”



International Tourist Arrivals



Source: Ministry of Tourism

Government Policies for Supporting Sustainable Tourism

- Establishing First National Park, Nino Konis Santana
- Establishing 15 Terrestrial Protected Areas
- Establishing 5 Marine Protected Areas





THANK YOU

turismo de
timor leste



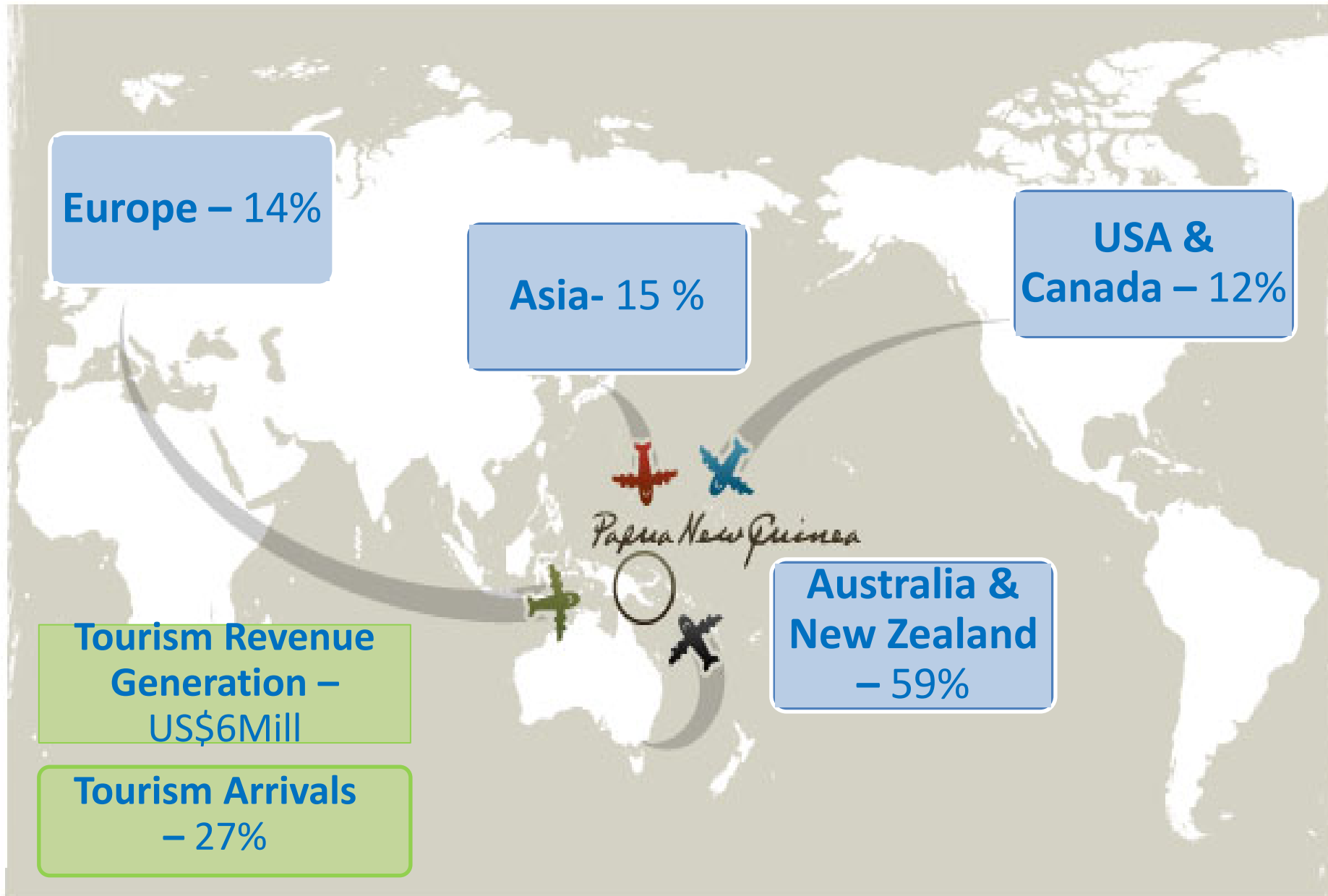
CORAL TRIANGLE
INITIATIVE
ON CORAL REEFS, FISHERIES AND FOOD SECURITY



Green Business Forum
for Asia and the Pacific
Investing in a Sustainable Future
22-24 November 2016 • ADB Headquarters



Papua New Guinea -Tourist Source Markets



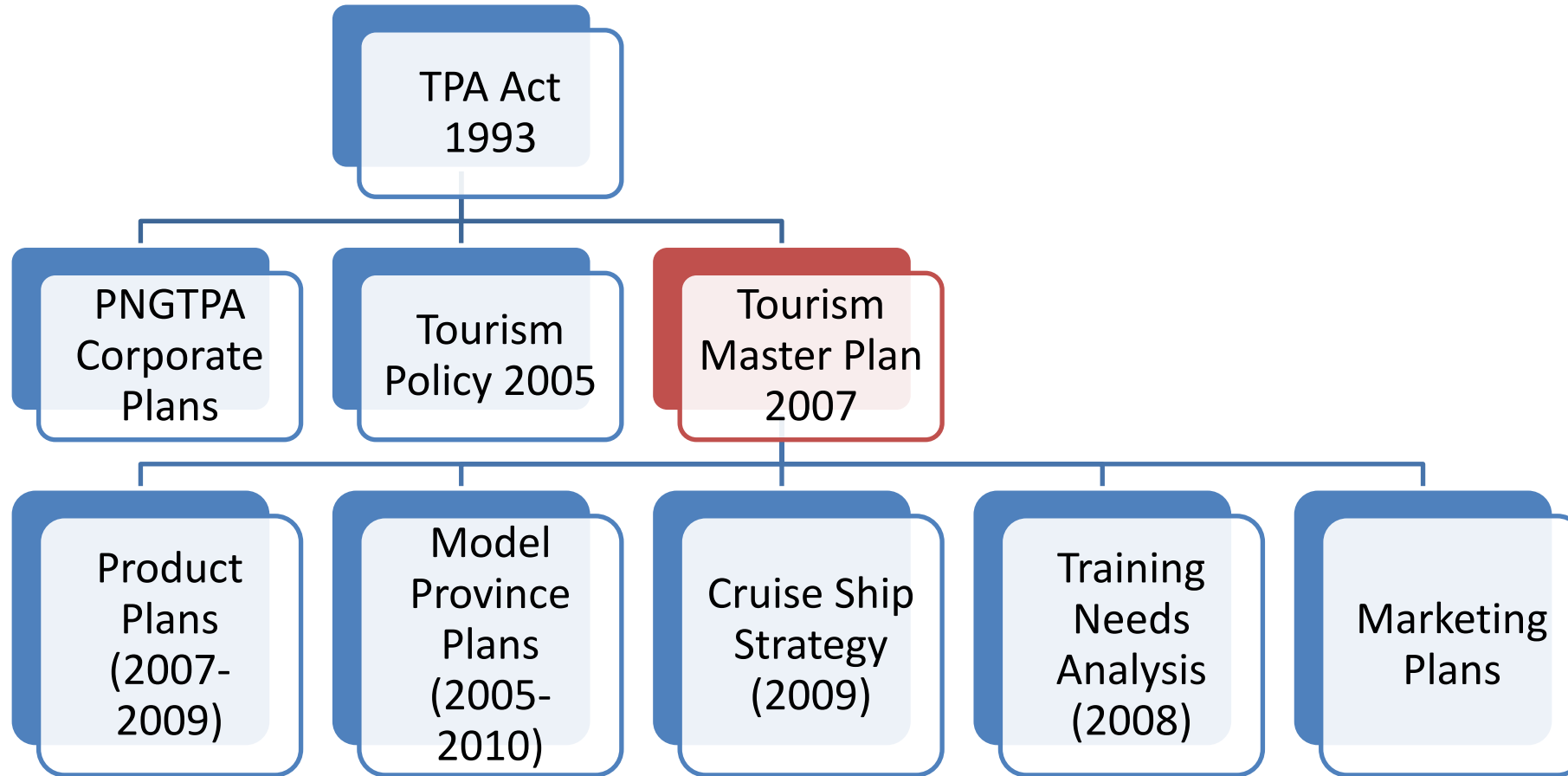
Primary Tourism Products



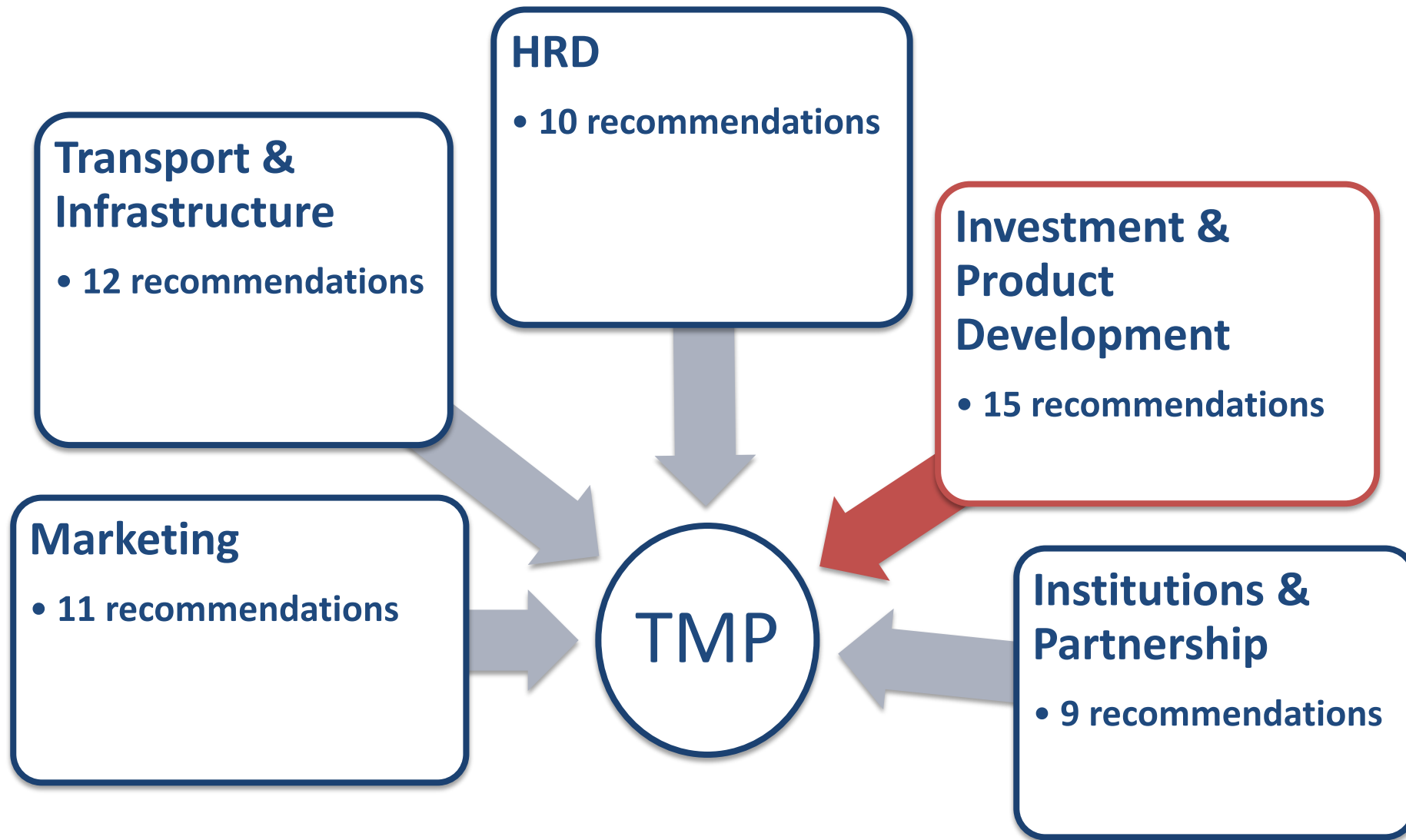
Secondary Tourism Products



PNG TOURISM POLICY & PLANNING FRAMEWORK



Tourism Master Plan – Nature Based Vision



Nature Based Case 1 - Kayaking in Tufi



Nature Based 2 – Surfing in PNG

- Surf Association of PNG
- Reverse Surfing Model
- Off Season Surfing Product - IMPP





Solomon Islands



WWF commissioned a baseline analysis to support the business case for conserving natural capital for sustainable economic development

Nature-based Marine Tourism in the Coral Triangle

Exploring the potential for low-impact, high-value
Nature-based Marine and Coastal Tourism

Tourism as a driver of socio-economic progress



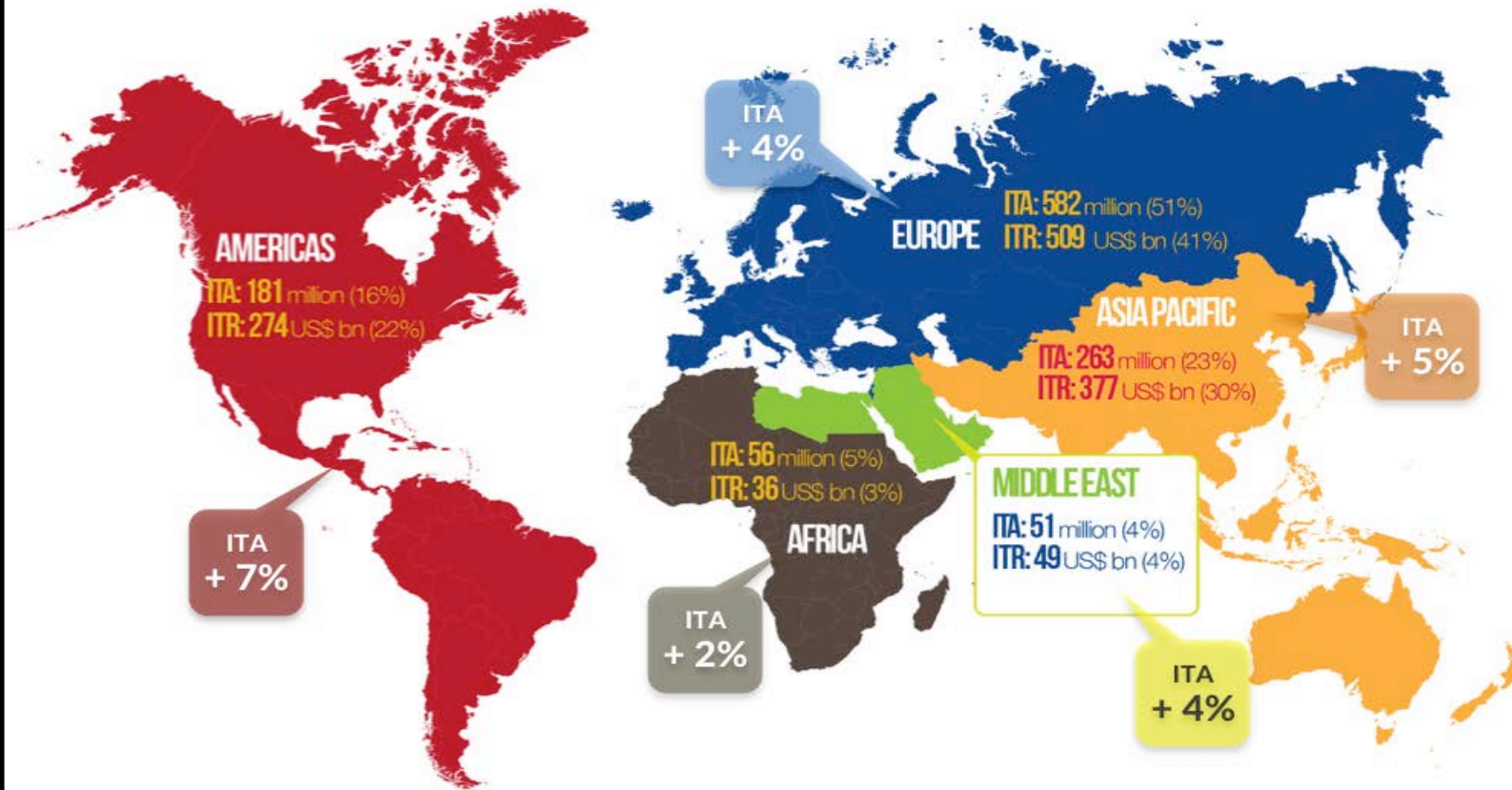
‘Tourism, one of the world’s top job creators and a lead export sector, especially for developing countries, can play a significant role in the achievement of MDG 1: eradication of poverty, MDG 3: gender equality, MDG 7: environmental sustainability and MDG 8: global partnerships for development.’

UNWTO. Tourism and the Millennium Development Goals. 2010



INTERNATIONAL TOURISM 2014

International tourist arrivals (ITA): 1133 million
International tourism receipts (ITR): US\$ 1246 billion



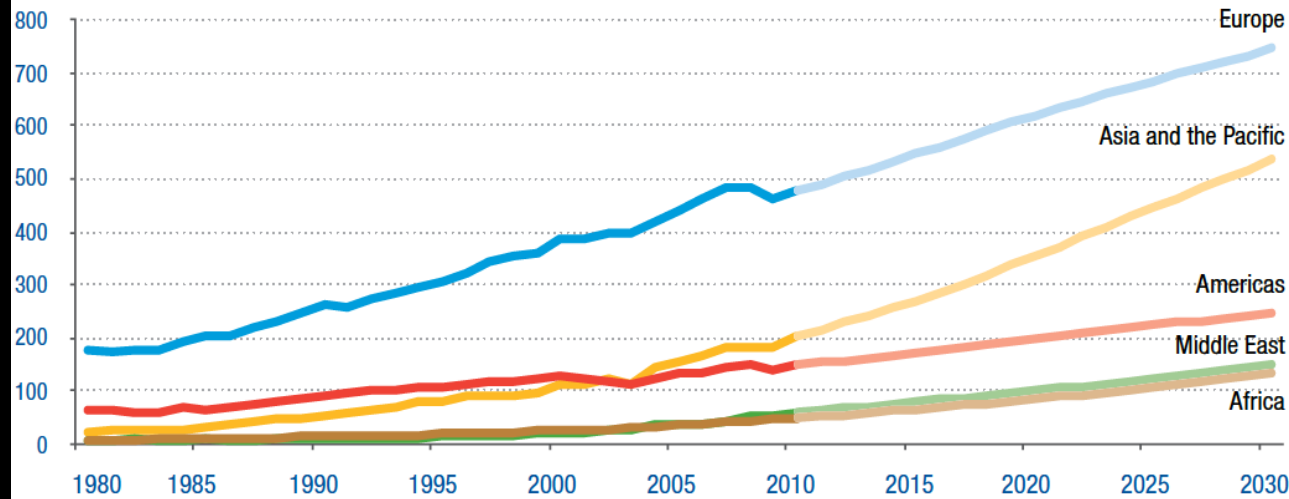
Tourism in the Asia Pacific and Southeast Asia

The Asia Pacific region now accounts for 30% of the US \$1,246 billion global tourism market by value, making it the second largest region after Europe (41%).

Inbound tourism by region of destination

International Tourist Arrivals, million

© UNWTO | Tourism Towards 2030: Global Overview. 2011, p. 15

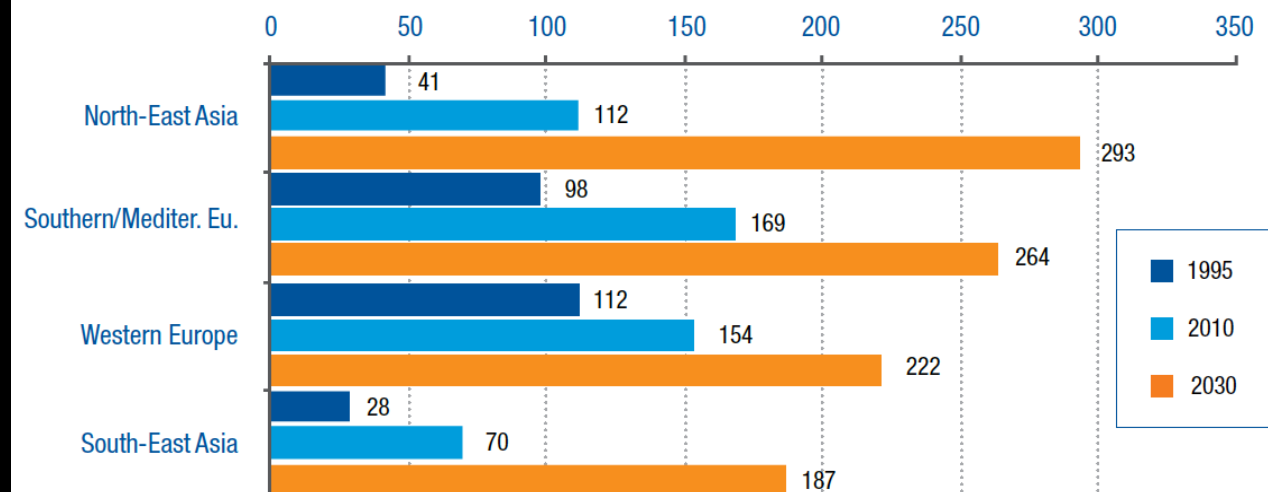


The global tourism market : Strong growth forecast to 2030

Sources: UN Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council, CTI-CFF Countries

International tourism by (sub)region of destination

International tourist arrivals, million



Current and Forecast Value of Nature-based and Adventure Tourism (2015 vs. 2035)

Sources: UN Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council, CTI-CFF Countries

| REGION/ SCALE | Estimated Value in 2015 | | | Forecast to 2035* | | |
|-----------------------------------------------|--------------------------------|-------------------------------------|---------------------|--------------------------------|-------------------------------------|---------------------|
| | Total Tourism Market (US\$) | Nature/ Adventure- Based Tourism | | Total Tourism Market (US\$) | Nature-based & Adventure Tourism | |
| | | 20% Share (US\$) | 25% Share (US\$) | | 35% Share (US\$) | 45% Share (US\$) |
| Global | \$1,246 billion | \$249 billion | \$311.5 billion | \$2,214 billion | \$775 billion | \$996 billion |
| Asia Pacific | \$377 billion | \$75.5 billion | \$94.3 billion | \$670 billion | \$234.5 billion | \$301.5 billion |
| Coral Triangle (CTI-CFF Countries) | \$98.7 billion | \$19.7 billion | \$ 24.7 billion | \$454.3 billion | \$159 billion | \$204.4 billion |

*2035 forecast is modelled on UN, WTTC and CTI-CFF Country data. Given the wide variety of variables, it should be taken as indicative only.

Emerging trends in Visitor Motivations and Behaviour

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012-2015.

EXPERIENTIAL TRAVEL

THE GREEN
MOVEMENT

TOURISM AS
EXPERIENCE

THE DEMAND
FOR PUBLIC
PROGRAMMING

THE CREATIVE
INDUSTRIES

THE REDEFINITION OF
BACKPACKING

THE 3 NEW S's

INCREASING
IMPORTANCE OF
NICHE/ INTEREST/
ACTIVITY BASED
TOURISM

THE GROWING TREND
OF CITIES AS
ATTRACTIONS

VOLUNTOURISM

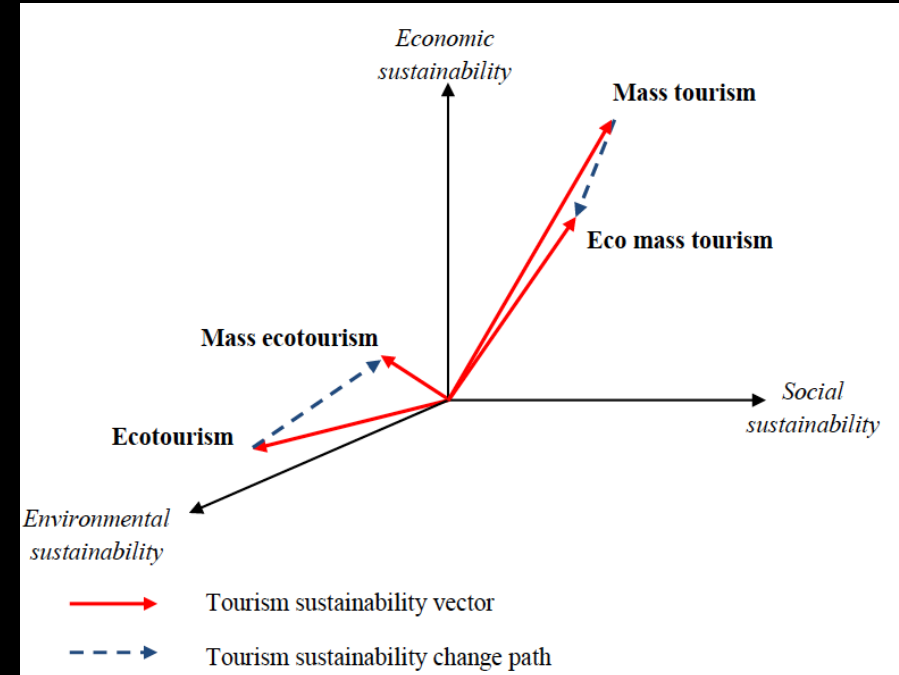
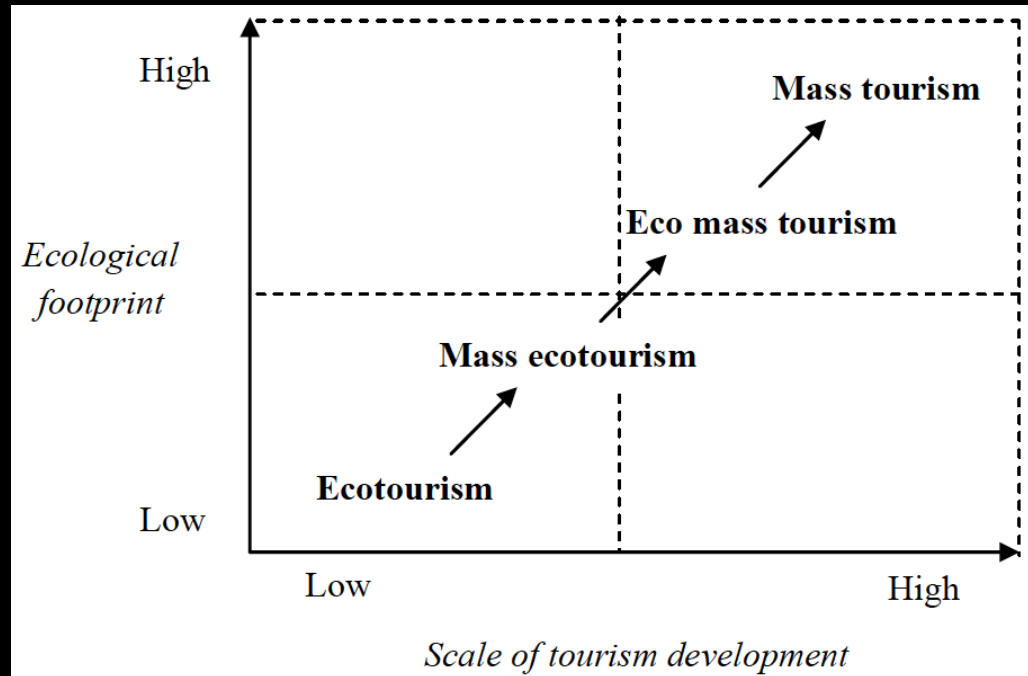
The overall opportunity for Nature-based tourism

- + Nature-based Tourism is often called out as **the fastest growing tourism segment globally**, has inherently higher-value per visitor than more mainstream forms of tourism, and is notably more resilient to the periodic downturns that impact tourism due to economic, societal, health or environmental reasons.
- + Underpinning all this is its **much lower overall impact on the communities and environments of host countries** and a real potential for it to help **accelerate a country's development path** over a sustained period of time.
- + Looking at the estimated current size of Nature/Adventure-Based tourism, it is clear that, **as well as being a rapidly growing segment, this is already an established market** – even if the exact numbers should be viewed with caution because of the current lack of segmented global data.
- + At somewhere between **US \$19.7 billion – US \$24.6 billion** in the Coral Triangle Countries, this places the size of the total Coral Triangle Nature/ Adventure-Based Tourism market as already equivalent to Malaysia's total domestic and international tourism market's combined (estimated at US \$25 billion in 2013/14).
- + Looking ahead to 2035, the upper estimated range of US **\$204.4 billion** would make the Nature/ Adventure-based tourism sector twice the current size of all 6 CTI-CFI countries total international and domestic tourism industries. To put it mildly, there is clearly potential available to be unlocked.

Which type of tourism growth?

Scale of Tourism Development/ Ecological Footprint (SDEF) Grid & Tourism Sustainability Vectors

Source: Ivanov, S., & Ivanova, M. (2013). Mass Ecotourism vs. Eco mass tourism.



An opportunity for a more balanced Tourism Industry

- + As detailed in the report, a great opportunity exists to start a journey towards a more balanced tourism industry in the Coral Triangle.
- + The potential scale, proportion and type of Nature-based Tourism varies in each country, but, whatever form it might take each country starts with that potential clearly ahead of it.

CTI-CFF sustainability framework

- 1. Sustainability Guidelines – establish principles that address:
 - Compatibility with the natural and cultural values of the land or sea and surroundings
 - Participation of local communities and contribute to their well-being/livelihoods
 - Sustainable and efficient use of natural resources, energy and water as well as site or landscape/seascape considerations
 - Consider legislative, policy & planning framework – aim to enable & enforce
- 2. Community and stakeholder engagement
 - Consultation and involvement from the outset
- 3. Sustainable Destination Strategy:
 - Develop destination positioning and assess target market and experience offer across the landscape
 - Identify opportunities, barriers and gaps, including signature experiences that reflect positioning and partners who can enable delivery
- 4. **Visitor experience**
 - **Quality visitor experiences encourage repeat visitation and advocacy**

What are important criteria and conditions for facilitation of private investment to achieve these countries visions?

