



National Stakeholder Workshop: Green Export Review

VANUATU

*Port Vila, Vanuatu
27-28 August 2014*

Harnessing Vanuatu's Tourism to enable local consumption and exports



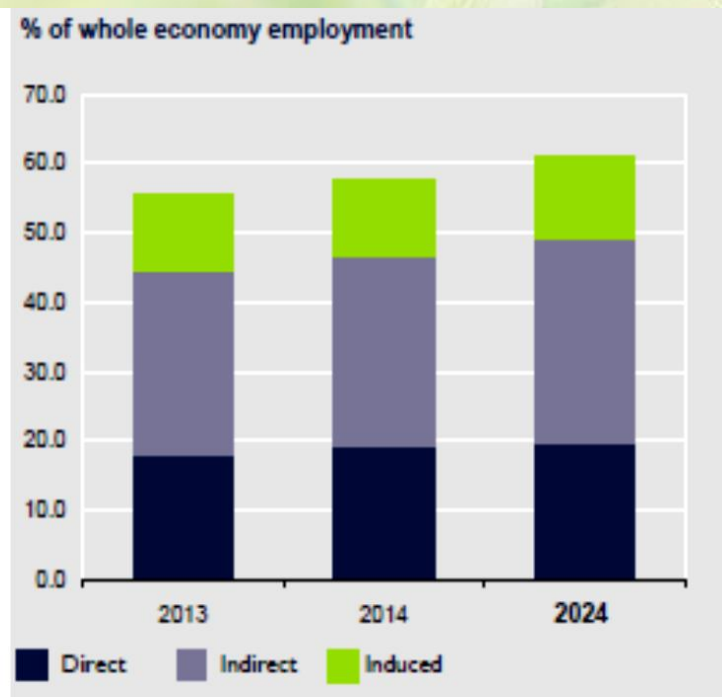
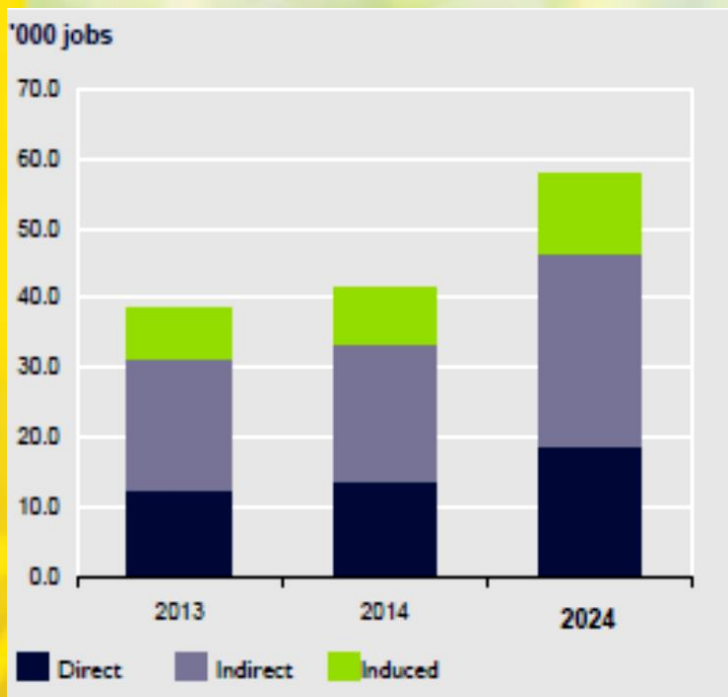
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Content

- The tourism sector in Vanuatu's economy
- Tourism forward and backward linkages
- Where do the tourists come from?
- Tourists' spending in Vanuatu
- How tourists spend their money in Vanuatu?
- SWOT for tourism as a driver for local purchases

- The total contribution of tourism (including travel and transportation) to GDP was VUV 44,204 million, about 65% of GDP in 2013
- The tourism sector is forecast to rise about 4.5% per annually to reach VUV 74,014 million by 2024 (70.9% of GDP)
- Most tourists are concentrated in the Port Vila area, Efate.
- The tourism sector has a significant impact over employment



Upstream or backward linkages

Basic infrastructure services:

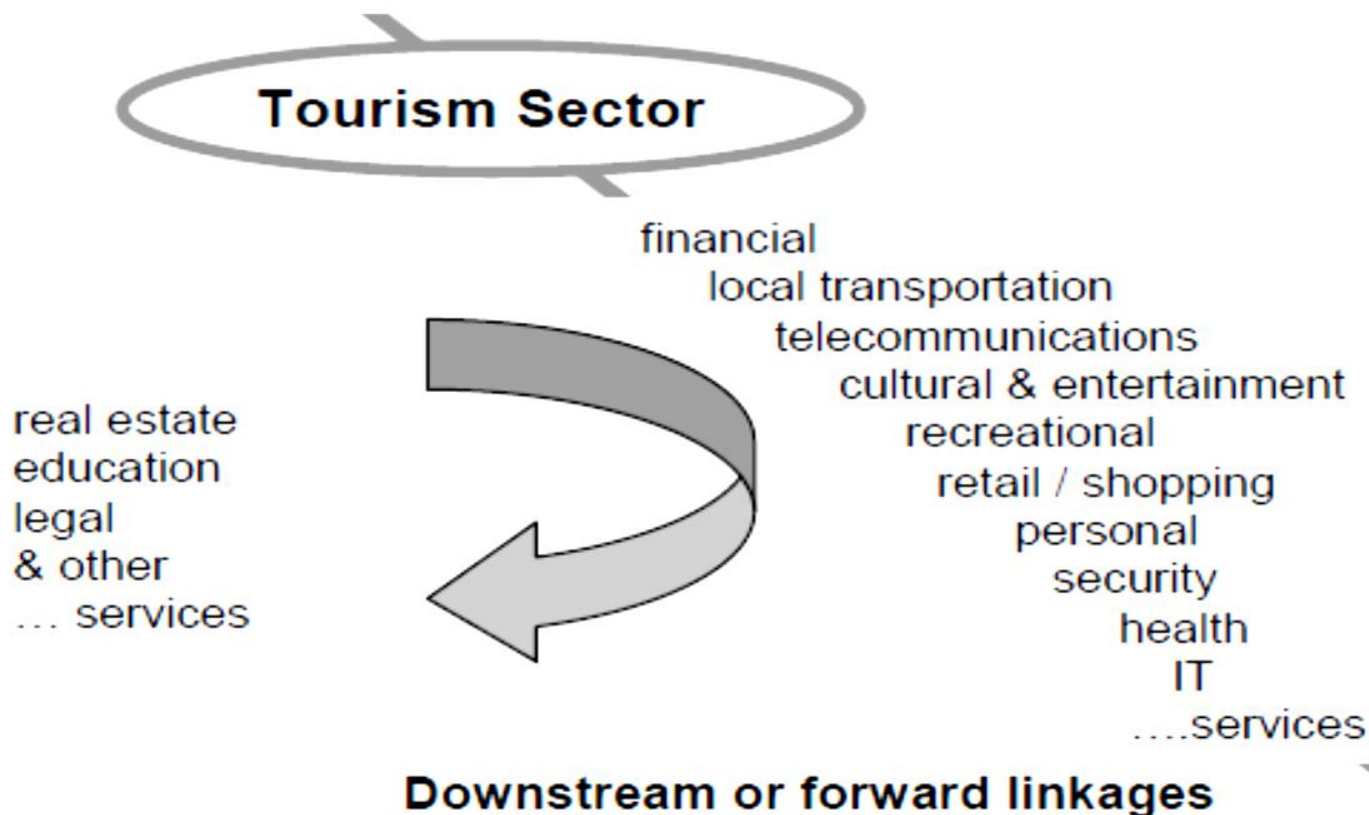
water, energy, telecom, sanitation & solid waste management services

Goods and services needed to build primary tourism facilities:

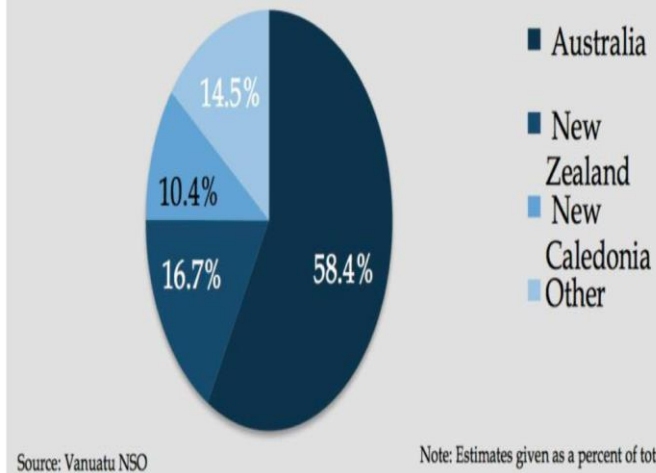
construction services, manufactured supplies

Goods and services needed to meet operational requirements:

agriculture and manufacturing, passenger transportation, hospitality, maintenance & repair and business services



Where do the tourists come from?



Source: IUCN (2012). Fishing and Tourism in the Vanuatu Economy

Vanuatu receives about 30 cruise ships per month in during high seasons.

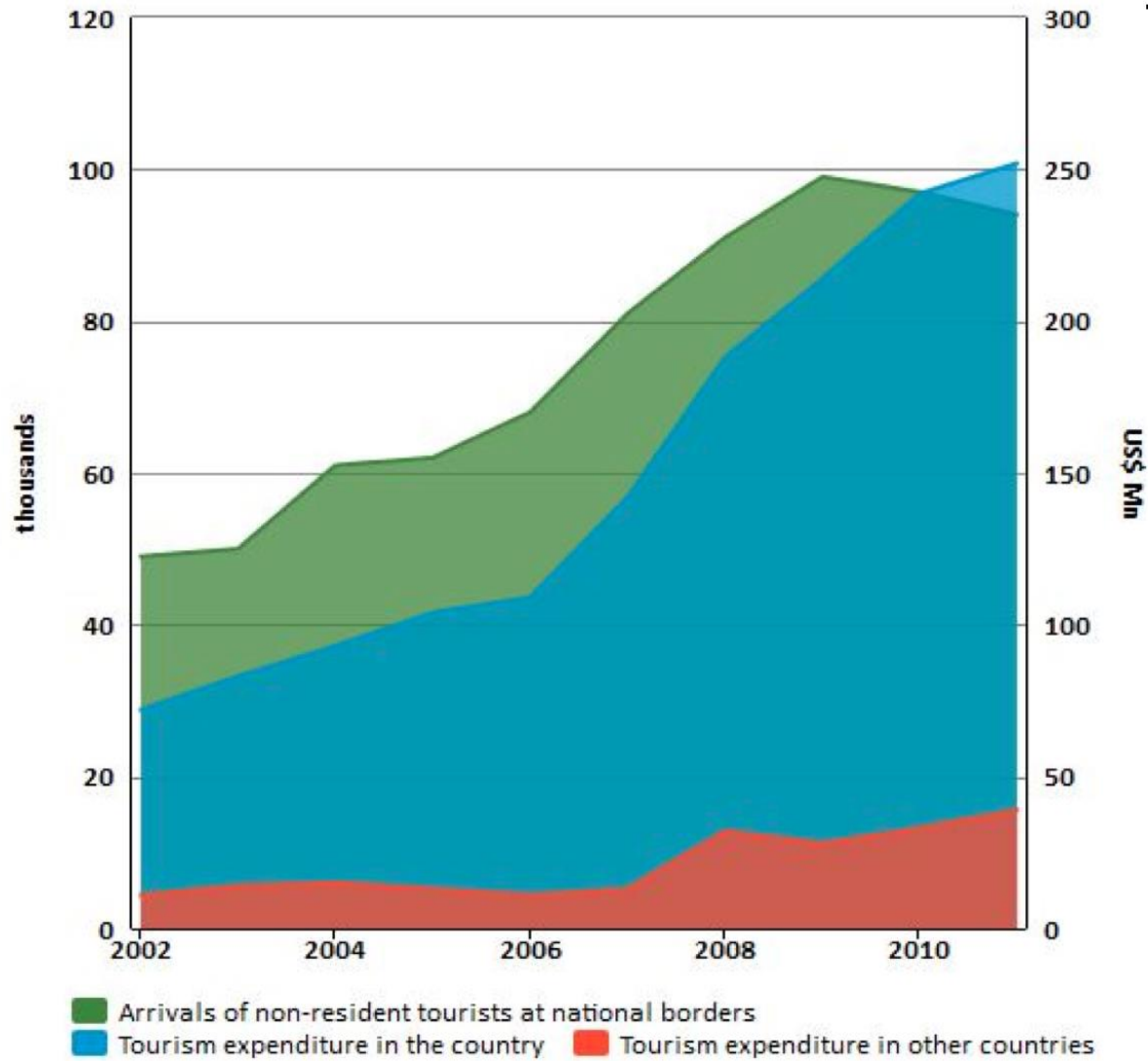
Source: Vanuatu's National Statistics Office (2013)

The purpose of the visitors are:

- 82% for holydays,
- 7% for business and conferences,
- 7% for familiy visits, and
- 3% for other purposes

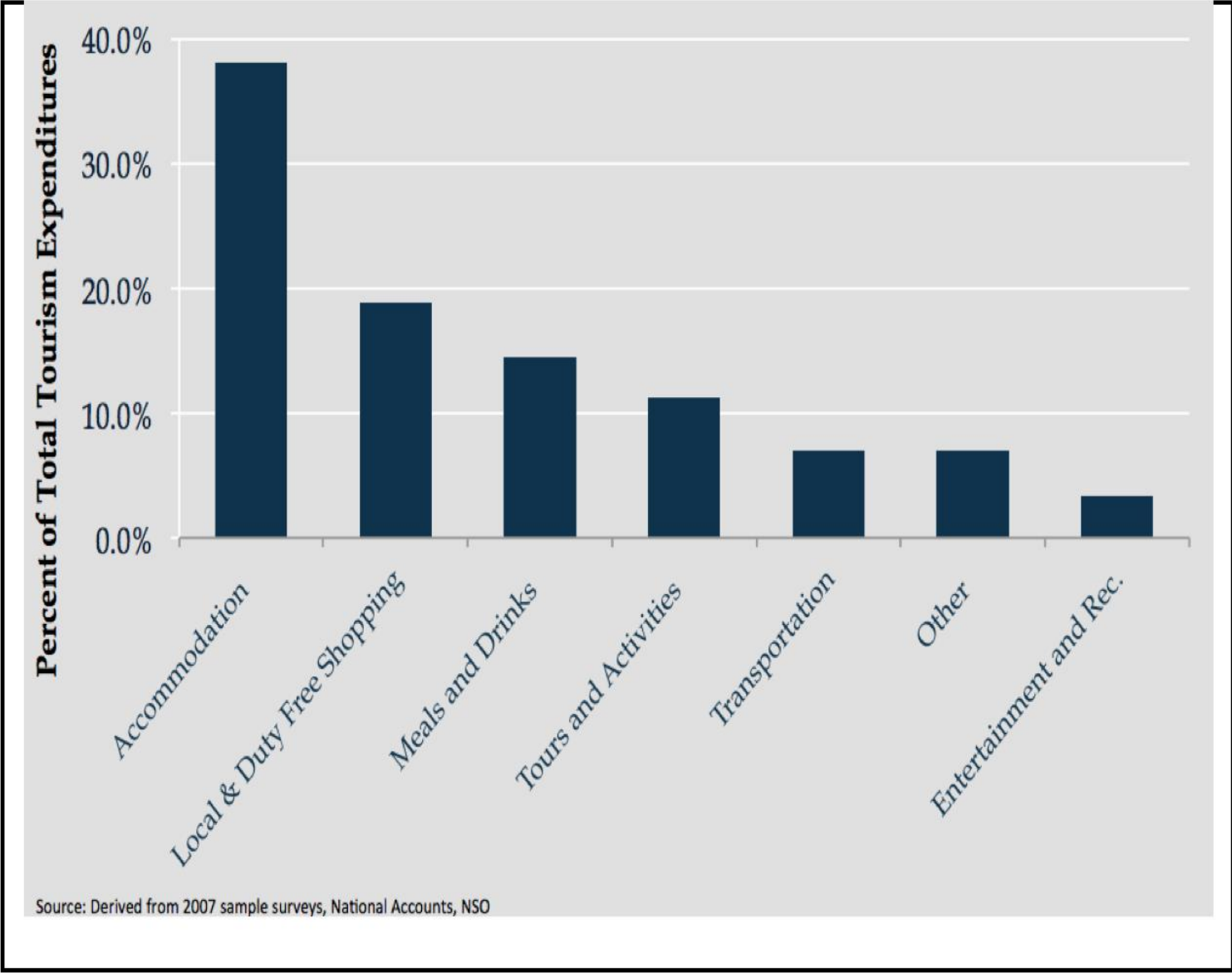
Source: Vanuatu's National Statistics Office (2013)

Tourists' spending in Vanuatu



Source: Based on Koema Atlas and UNWTO statistics (2013).

How tourists spend their money in Vanuatu?



IUCN (2012). Fishing and Tourism in the Vanuatu Economy

Linking Fishing to Tourism

Global tourism trends show that visitors are increasingly interested in authentic experiences that connect them to the people and places they visit

Tourists want to meet local people, learn about how they make a living off the land and sea, and taste the fruits of that labor.

Tourists increasingly want to feel good about where they spend their money, they want to support businesses that match their values.

Fishing with local fishermen, eating in a fishing cooperative restaurant are exactly the kind of activities today's tourists are looking for.

Top Tourist Fishing Companies in Port Vila

Harbour Fishing Charters

#12 of 43 Outdoor Activities in Port Vila

Wild Blue Fishing Charters

#22 of 43 Outdoor Activities in Port Vila

Crusoe Fishing Adventures

#25 of 43 Outdoor Activities in Port Vila

Topless Fishing Charters

#39 of 43 Outdoor Activities in Port Vila

Aquavana Spear fishing Adventures

#43 of 43 Outdoor Activities in Port Vila



We have this
already

Can we
develop this ?



Top Seafood Restaurants in Port Vila

Elan

#3 of 77 Restaurants in Port Vila

Ripples

#4 of 77 Restaurants in Port Vila

The Beach Bar

#5 of 77 Restaurants in Port Vila

Aquana Beach Resort

#6 of 77 Restaurants in Port Vila

Restaurant le Jardin des Saveurs

#9 of 77 Restaurants in Port Vila

Bungalow: Ate

#10 of 77 Restaurants in Port Vila

Mangoes Resort Restaurant & Bar

#21 of 77 Restaurants in Port Vila

Vila Chaumieres Restaurant

#26 of 77 Restaurants in Port Vila

Shiki Restaurant

#30 of 77 Restaurants in Port Vila

The Waterfront Bar and Grill

#31 of 77 Restaurants in Port Vila

L'Houstalet Restaurant

#36 of 77 Restaurants in Port Vila

Starfish Cove Restaurant & Bar

#40 of 77 Restaurants in Port Vila

Aqua on Erakor

#42 of 77 Restaurants in Port Vila

La Mer Restaurant

#44 of 77 Restaurants in Port Vila





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Fish and Chips

Lobster Rolls



Fried Clams



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Strengths	Weaknesses
<ul style="list-style-type: none"> - Extraordinary Natural endowments (strong ecotourism profile). - Cultural richness - Tourist demand will continue and has a tendency to increase - Several of the products discussed are highly demanded by tourists; especially in value added ones (e.g. coconut foods and chocolates, personal care products from coconut oil and cocoa butter, sandalwood sticks, etc.) - Efforts toward internal island travel facilitation (e.g. air pass packages and island bungalows) 	<ul style="list-style-type: none"> - Long distances from Western markets - Poor air access - Limited qualified labour - Low internet penetration infrastructure (from 3G to 4G) - Limited and costly inputs - Low quality standards and packaging - Poor distribution and marketing channels - Sporadic difficulties in importing capital goods through transit ports
Opportunities	Threats
<ul style="list-style-type: none"> - Tourist purchases demand higher standards that can also help in traditional exports - Links purchases with cruise visits, sailing boats routes and other related services - Create and expand local traditional markets: foods, textiles and crafts - Expand the eco, agro and cultural tours offer - Promote minimum supply contracts with hotels and restaurants for key goods, cultural entertainment and personal care services - Potentially expand air travel routes to key Asian destinations - Reach untapped Asian markets (e-marketing) 	<ul style="list-style-type: none"> - Over dependency of Australian and New Zealand tourists - Most of the expenditure is in Port Vila and surrounding - Lack of access to credit and technical support for small producers to meet standards