

Prepared for South Pacific Tourism Organisation (SPTO)

Project No. 9 ACP-RPA-006

**Feasibility Study for
Pacific Ecotourism Association (PETA)**

DRAFT FINAL REPORT

**Dr Louise Twining-Ward
Tourism Resource Consultants Ltd
22/12/05**

EXECUTIVE SUMMARY

Over the last two decades, ecotourism has gathered supporters and followers across the world. From a niche or alternative activity to mass tourism, it has developed into a new philosophy for approaching sustainable development. As its approval ratings have risen, so has the demand for nature and culture experiences from international travellers. It is currently estimated that 10-20% of all international visitors engage in some form of ecotourism activity.

The South Pacific is particularly well endowed with the key ingredients of successful ecotourism; nature, culture and hospitable local communities, but these alone are not enough to secure the development of sustainable ecotourism opportunities. As well as the examples of regional ecotourism successes, there also exist reports of low environmental standards, failed businesses and disappointed tourists. If the South Pacific is going to develop and maintain a reputation for quality nature and culture it needs to find a mechanism to assist operators to provide quality ecotourism products and experiences.

SPTO has already undertaken a number of seminars and workshops in order to collectively identify actions that can address these issues. During these meetings the suggestion for the formation of a Pacific Regional Ecotourism Association (PETA) has been made on several occasions. The purpose of this study is to investigate the market, technical and financial feasibility of PETA and provide recommendations for a possible way forward.

The study begins with a situation analysis, an examination of contemporary trends in the supply and demand for ecotourism both internationally and in the South Pacific. It then presents the results of the market analysis; questionnaire and interview data from five SPTO-member countries. The technical assessment examines the role, functions and structure of ten ecotourism associations from across the world and then looks at the strengths and weakness of South Pacific Associations. Finally, the financial analysis reviews the potential costs and revenues of two different structures: a conventional membership-based PETA and a web-based Green-hub.

The situation analysis finds that although the statistics are fairly limited, there is a growing demand for ecotourism products worldwide and in the South Pacific in particular. Although it is almost impossible to assess the number of operators already providing ecotourism services in the region, it is clear the sector is increasing in size and diversity from ecolodges and tour operators to small hotels, dive operators, protected areas, community projects and large resorts. Accordingly, the region boasts many fine examples of ecotourism practice, but also has its share of challenges of failed ecotourism ventures. There is a clear need for improved guidelines, standards business knowhow and market linkages.

As part of the market analysis for this study, all SPTO member national tourism organisations took part in a questionnaire survey to assess their views on the development of a regional ecotourism association. Whilst most appeared in favour of

PETA in principle, in practice many had concerns about how such an association would be run and implemented. The result of a similar questionnaire completed by the private sector suggested operators were even more sceptical of the idea of PETA, concerned that the financial burden would fall on their own shoulders and also wary of the poor performance of already existing national associations. During face-to-face interviews in Fiji, Samoa, Cook Islands, French Polynesia and Tonga, broader discussions about the desirability of setting up PETA, ideas for the possible form and function of PETA and possible products and services to be provided by PETA, were undertaken. There were still very mixed views about PETA, some vaguely positive and others vigorously opposing the idea. It certainly was not a unanimous vote of support for the concept of a membership-based association, particularly if this was a separate entity to SPTO. However, when given the chance to state their own views on the form and functions of PETA, stakeholders were much more thoughtful and enthusiastic. One hotelier raised the idea of a web-based PETA, providing information and exchange of information across the region. When this was suggested to other informants there was a great deal of interest and support for the concept.

The technical assessment focused on the form and function of ecotourism associations elsewhere in the world, along with an analysis of the performance of existing associations in the South Pacific. The assessment of international organisations provided many good ideas and examples of projects and networks that have been established to assist operators to learn from each other. Some of these are highlighted as boxed examples in this section such as the Kenya Ecotourism Association ecorating scheme and the Caribbean Alliance for Sustainable Tourism's sponsorship programme, Friends of the Caribbean. Personal communication with several associations also provided useful insights into their administrative structure and operations and are written up as boxed interviews. The assessment of South Pacific associations found some disappointments and also a few success stories. The research enabled the identification of a number of aspects that appeared to be crucial to the success of the associations reviewed including the experience and commitment of their executive committee, the employment of permanent staff, having a strategic or business plan to guide activities and the level of membership fees.

The financial analysis examines the cost and revenues associated with two different options: PETA as a conventional membership-based association and a web-based Green-hub. The results showed that whilst PETA is likely to incur substantial costs and generate limited revenues, the Green-hub has the potential to incur small net cash flows by the end of year 5.

As a result of the four assessments a series of recommendations are made for the development and implementation of the Green-hub. It is envisaged that the Green-hub administration will be developed as an extension and added-value for SPTO and their members. An Executive Committee of three members can be identified from the existing SPTO Board to discuss and approve annual work programmes and budgets. An administrator can be employed to manage the site and volunteer advisors will be identified to moderate the advisors network in a similar manner to PESTNET.

The products and services the Green-hub will provide includes; guidelines and standards, a database of ecotourism statistics, an advisors network, links to success stories and flagship projects. In addition the site will highlight suppliers of eco-friendly technology,

sponsors (friends of the green-hub), community projects, partner organisations and, in-time develop a travellers information site showing links to green travel products.

The main expenses incurred by the Green hub will be the administrator's salary and the website maintenance. Nevertheless, it is anticipated that through the friends of the green-hub programme, the site could potentially be self-sustaining within five years, and revenues could be increased after this if an e-booking system for ecotourism activities was added. Donor funding, however, will be required to undertake additional projects such as accreditation, conferences or the development of an e-booking system for ecotourism activities.

The final part of the study lays out a suggested work plan and activities for the development and implementation of the Green-hub. This includes the development of a business plan and website content followed by the design and layout of the site. The conclusion of the study highlights the importance of SPTO involvement in supporting the sustainable development of ecotourism opportunities in the region, and suggests that the Green-hub provides a convenient, low-cost vehicle with which to address a number of issues and spearhead improvements to ecotourism in the region.

TABLE OF CONTENTS

Executive Summary	2
ACKNOWLEDGEMENTS	6
ABBREVIATIONS	6
Introduction	7
PURPOSE	8
METHOD	8
Situation Analysis.....	9
ECOTOURISM DEFINITION & CONTEXT	9
SOUTH PACIFIC ECOTOURISM	10
ECOTOURISM SUPPLY	10
ECOTOURISM DEMAND	12
Market Analysis.....	13
NTO QUESTIONNAIRES.....	13
OPERATOR QUESTIONNAIRE	13
FACE TO FACE INTERVIEWS.....	14
Technical Analysis.....	18
FORM AND FUNCTION OF ECOTOURISM ASSOCIATIONS	18
BACKGROUND.....	18
PURPOSE & ROLES.....	18
ACTIVITIES	19
MEMBERS & MEMBER BENEFITS.....	20
ADMINISTRATIVE AND FINANCIAL STRUCTURE.....	20
WEB SITES	21
TOURISM ASSOCIATIONS IN THE SOUTH PACIFIC	26
Financial Analysis.....	29
PETA COSTS & REVENUES	29
GREEN-HUB COSTS & REVENUES	31
Summary and Recommendations	33
MARKET FEASIBILITY	33
TECHNICAL FEASIBILITY.....	33
FINANCIAL FEASIBILITY	34
RECOMMENDATIONS	35
NEXT STEPS.....	37
Conclusion.....	39
APPENDIX	40
PEOPLE CONSULTED.....	40
NTO QUESTIONNAIRE	43
PRIVATE SECTOR QUESTIONNAIRE.....	48
END NOTES & REFERENCES	52

LIST OF TABLES

Table 1. Ecotourism Associations	23
Table 2. Selected Tourism Associations in the South Pacific.....	27
Table 3. PETA Cash Flow Forecast.....	30
Table 4. PETA Profit and Loss Sheet.....	30
Table 5. Green-hub Cash-flow Forecast	32
Table 6. Green-hub Profit and Loss Sheet	32
Table 7. Proposed Green-hub Contents.....	36

ACKNOWLEDGEMENTS

This report is grateful for the support, enthusiasm and assistance of numerous people around the region. In particular thanks to the Lisiate 'Akolo, Ross Hopkins, Peter Dawkins, Helen Polouva'ati and Shoma Prasad at SPTO; Dave Bamford, Ross Corbett, Leanne Harrison of TRC and Martine Bakker of NYU. Thanks also to all those stakeholders who willingly arranged to meet and discuss PETA with me, and corresponded via e-mail before, during and after my visits. The assistance provided by Nynette Sass of the Samoa Hotel Association, Robert Skews of the SPTO Board, Grahame Jackson of PESTNET and Jan Malone of Ecotours New Zealand was also greatly appreciated.

ABBREVIATIONS

AMTAVE	Mexican Association of Adventure tourism & Ecotourism
AusAID	Australian Development Assistance
AYAD	Australian Youth Ambassador
AWRTA	Alaska Wilderness, Recreation & Tourism Association
CAST	Caribbean Action for Sustainable Tourism
CESD	Centre on Ecotourism and Sustainable Development
CITC	Cook Islands Tourism Corporation
EIA	Environmental Impact Assessment
ESCAP	Economic and Social Commission for Asia and the Pacific
ESOK	Ecotourism Society of Kenya
FHA	Fiji Hotel Association
GG21	Green Globe 21
IHRDPEP	Integrated Human Resources Development Program for Employment Promotion
JICA	Japanese International Cooperation Agency
NEAP	National Ecotourism Assessment Programme (NEAP)
NTO	National Tourism Office/Organisation
NYU	New York University
NZAid	New Zealand's International Aid and Development Agency (formerly NZODA)
PESTNET	Pest network for South East Asia and the Pacific
PETA	Pacific Ecotourism Association
QUANGO	Quasi-autonomous non-governmental organisation
SCARF	Seed Capital Revolving Fund
SD	Sustainable Development
SPREP	South Pacific Regional Environment Programme
SPTO	South Pacific Tourism Organisation
SPBCP	South Pacific Biodiversity Conservation Programme
SHA	Samoa Hotel Association
STA	Samoa Tourism Authority
TIES	International Ecotourism Association
TRC	Tourism Resource Consultants
TVB	Tonga Visitors Bureau
TVB	Tonga Visitors Bureau
UNDP	United Nations Development Programme
VTOA	Vanuatu Tourism Operators Association
WTO	World Tourism Organisation (now UNWTO)
WTTC	World Travel and Tourism Council
WWF	World Wide Fund for Nature

INTRODUCTION

Over the last two decades, ecotourism has emerged as a popular new approach to tourism development. It reflects a desire to reduce the observed negative environmental and cultural impact of mass tourism on one hand, and on the other, to meet the increased demand for nature and cultural activities as an alternative, or supplement, to more conventional holidays.

Nature and culture are the primary, yet under-utilised tourist attraction for most South Pacific tourism destinations. However, many of SPTO's member countries face serious threats to the sustainability of these resources from pollution, population growth and logging amongst many others. Ecotourism is a natural choice to address both these challenges. However, the development of ecotourism requires more than simply attractive, marketable products as many communities and small businesses around the region have already learned. Using ecotourism as a marketing catchphrase while openly polluting resources is unlikely to bring return visitors. Similarly, developing a top quality product, without linkages to tourist markets, is likely to end in an expensive mistake.

Acknowledging these and other constraints to the successful and sustainable development of ecotourism in the region, leads many to suggest the need for a more integrated approach, and regional solutions and support for the growing number of ecotourism operators. SPTO has already undertaken a number of seminars and workshops in order to collectively identify actions that can address these issues. During these meetings the suggestion for the formation of a Pacific Regional Ecotourism Association (PETA) has been made on several occasions.

There are currently in existence a number of national ecotourism associations and ecotourism projects undertaken by public, private and non-profit sectors in SPTO member countries. There is, however, a lack of coherent structure to link and support these entities and help them to learn from each other. Consequently, this study focuses on investigating the feasibility of setting up a Pacific regional ecotourism association.

In undertaking the study it is important to consider the context of international ecotourism development, the special circumstances of the South Pacific and the challenges facing ecotourism operators in the region. Much can also be learned from looking at the form, function and financial structure of international and regional ecotourism associations in existence worldwide, along with the strengths and weaknesses currently faced by associations in SPTO member countries.

This feasibility study investigates PETA in terms of its market, technical and financial viability. It is based on extensive consultations in five SPTO member countries along with web-based research of tourism associations and current ecotourism trends. It concludes that a conventional, member-based association is not currently desired or financially viable and that a web-based solution, called here the Green-hub, would better meet the stated needs of ecotourism operators, and be a more financially viable option for SPTO to adopt.

PURPOSE

To explore the feasibility of establishing PETA. The key tasks for this project, as identified in the Terms of Reference, were as follows:

- 1) Consultations with key government and NTO representatives, existing industry organisations to identify the requirement for and support for PETA;
- 2) Definition of the services and products PETA would offer and the basis and costs of membership.
- 3) Identification of the demand for these services; including costs and potential revenues.
- 4) If viable, develop a Business Plan for PETA, which should include an action plan for the establishment of the organization
- 5) Development of a Code of Practice for the tourism industry in the Pacific; with a specific section for Ecotourism operators that can be applied to PETA members;

This report addresses the first three of these bullets. The last two will be addressed if SPTO accepts the recommendations given here and wishes to move on to the next phase.

METHOD

The method for this feasibility study included four main components:

1. Situation Analysis

- Examination of context, demand and supply of ecotourism internationally and in the South Pacific

2. Market Analysis

- Interviews and questionnaire results from NTOs, operators and other stakeholders in five SPTO countries on their views on establishing a regional ecotourism association

3. Technical Assessment

- Investigation of the role, function and structure of ecotourism associations internationally
- The strength and weakness of existing tourism associations in the South Pacific

4. Financial Analysis

- Financial analysis of PETA versus the Green-hub

SITUATION ANALYSIS

ECOTOURISM DEFINITION & CONTEXT

Over the last two decades, ecotourism has gathered supporters across the world. Ecotourism is the main success story from the alternative tourism debate that originated during the 1980s in response to widespread critique of the impact of mass tourism, particularly in the developing world.

There has been much debate on the definitions of ecotourism, but some of its mostly commonly agreed characteristics are as follows:

- Involves visit to natural or cultural sites of interest
- Involves an element of interpretation or education about these sites
- Minimises the negative impact of the visit on the site
- Maximises the positive involvement of local people, and the benefits they derive from tourism.

The International Ecotourism Society (TIES), provides a simple, fairly universally accepted definition of ecotourism as follow:

"responsible travel to natural areas, which conserves the environment and improves the welfare of local people"¹

However, the TIES definition fails to adequately recognise the importance of education and culture, which are key to ecotourism in the South Pacific. Accordingly, the definition of ecotourism used here is that developed by SPTO in 2001:

[Ecotourism is...]"nature, culture and community based tourism that is ecologically and economically sustainable and it involves education and interpretation of the natural environment and ensures social and economic benefits of the local community"

Not everyone has wholeheartedly supported the development of ecotourism operations, either internationally or in the South Pacific region. Some see it as spreading mass tourism to even more sensitive natural areas and others are concerned that the concept has been hijacked for commercial purposes, and used to describe virtually any nature-based tourism activity regardless of its impacts². But ecotourism's core values have been supported by the general movement towards sustainable development. From the Rio Earth Summit in 1992, Barbados in 1994, Johannesburg in 2002 and the UN meeting on Small Islands States in Mauritius, 2004 the need for the development of economic options that conserve precious environmental and cultural resources whilst at the same time helping to reduce poverty and increase quality of life, has been repeated, and ecotourism has been highlighted as a way forward.

Ecotourism's status as a bone fide vehicle for sustainable tourism was also cemented during the 2002 UN International Year of Ecotourism, which culminated in the World

Ecotourism Summit in Quebec. More than one thousand participants from 132 countries met to discuss a series of recommendations for the public, private and non-profit sectors to implement in order to achieve more sustainable ecotourism. As a result, it is now generally agreed that ecotourism forms a distinctive part of the movement towards sustainable tourism:

Ecotourism is distinguished from the wider concept of sustainable tourism by the following characteristics:

- Contributes actively to the conservation of natural and cultural heritage,
- Includes local and indigenous communities in its planning, development and operation, contributing to their well-being,
- Interprets the natural and cultural heritage of the destination to visitor,
- Lends itself better to independent travellers, as well as to organized tours for small size groups

(Quebec Declaration on Ecotourism, 2002)

SOUTH PACIFIC ECOTOURISM

Environment and culture has always formed a crucial part of the South Pacific tourism product, a fact supported by virtually every visitor questionnaire. Although the main attraction of the South Pacific is undoubtedly still the coastal zone, more visitors are now interested in supplementing their resort holiday with tours to protected areas, cultural villages and alternative tourism activities. There is an increasing realisation from the Cook Islands to Tahiti that in order to differentiate the product and compete successfully with destinations elsewhere, the South Pacific needs to focus more on nature and culture-based marketing and increase the quality of its ecotourism products.

SPTO has also had a close involvement in promoting the sustainable development of ecotourism in member countries over the last five years. The work has broadened over time from a focus on the development of ecotourism products to supporting the sustainable development of ecotourism through training and education. The Regional Tourism Strategy, for example, identifies the promotion of alternative tourism, especially ecotourism and community based tourism as important tools for poverty reduction, providing opportunities for people in the rural areas³. The results of this work has included a greater awareness and understanding of the need for standards, codes of practice, monitoring training, and awareness and marketing assistance, for ecotourism operators across the region, along with frequent mention of the need for a Pacific Ecotourism Association.

ECOTOURISM SUPPLY

It is clear that the South Pacific has an over-abundance of those elements that normally constitute the backdrop for tourism; forests, reefs, bird life, isolated locations and strong indigenous cultures. Although there is no definitive list of ecotourism operators in the region, with increased demand for these products in recent years a number of successful operations have been developed at community, small and large operator level. Examples include:

- Ecotour Samoa, which has pioneered ecotourism in Samoa and now also in Fiji, and by so doing has helped raise community understanding of waste management systems, quality backpacking and village stays.
- The Arts Village at Pacific Harbour in Fiji is providing an ecotourism cultural experience designed primarily for resort visitors from Fiji's Pacific Harbour, and by so doing has diversified the tourist experience and taught the dying skill of bamboo weaving to a whole village.
- A local farming family in the Cook Islands has started Oromai, a tourism attraction based on the idea of linking local farming techniques to tourism.
- Friendly Island Kayak Company in Tonga has put considerable effort into establishing whale-watching guidelines and improving the conservation awareness of other operators. In so doing it has turned its version of marine tourism into responsible ecotourism.
- Turtle Island, a high-end resort in the Yasawas, Fiji has made the connection between luxury tourism and community health care⁴.
- The Bouma National Heritage Park, a community effort to develop ecotourism in a protected area of Tavenuni and Northern Fiji, won the British Airways Tourism for Tomorrow award in 2002 for its sustainable park management⁵.

The important point thing to note with these examples is that they are not only ecotourism tour operators. Ecotourism philosophy, in the regional context is as applicable to large luxury resorts as it is to community projects.

Fiji is perhaps the country that has so far put most emphasis on its own brand of cultural ecotourism, which its tourism plan defines as "community-based tourism activities" or village-based tourism⁶. Although this have always been seen as secondary to Fiji's coastal resorts, the development of ecotourism awards, endorsement of Green Globe (GG) 21, and now Green Fiji, along with the National Ecotourism Programme and the Ecotourism and Village-based Tourism Strategy show a commitment from the Ministry of Tourism towards small-scale, locally owned ventures. The following is an excerpt from an SPTO newsletter derived from the Fiji Times.

Fiji Government Support for Ecotourism

The Fiji Visitors Bureau Chief Executive Viliame Gavoka said eco-tourism was a growing segment, and the Government has adopted five principles to guide eco-tourism development, which requires sustainable, culturally sensitive, ecologically sound and nature based, educational and importantly involves local people. In 2003 the government funded 44 projects from the eco-tourism grant of \$500,000, 12 projects from Integrated Human Resources Development Program for Employment Promotion (IHRDPEP) and 15 projects from Tourism Seed capital revolving fund of \$691,169. The IHRDPEP provides assistance to resource owners, wanting to establish eco-tourism business. Government has set up Seed Capital Revolving Fund (SCARF) through the Fiji Development Bank, to finance small indigenous eco-tourism projects.

Source: Fiji Times⁷

Despite the sense of optimism that ecotourism appears to generate, as well as success stories, each country also seems to have its fair share of less impressive ecotourism experiences. Ecotourism projects linked to SPREP's SPBCP project were well grounded in conservation but weak in business operations and several failed as a result. In Vanuatu, which has become known for its Pentecost land divers, there has been concern that

commercialism has taken over and had negative impacts on the local culture. Local initiatives in Fiji have been quick to adopt the term ecotourism but there have been reports that many have pit latrines polluting local lagoons and water sources⁸. The Fijian run Devokula village project, which started as a 'model' village, ended up closing due to lack of visitors when the international marketing agent pulled out⁹. Consequently there still appear to be a number of challenges that need to be urgently addressed such as standards, business know-how and market linkages.

ECOTOURISM DEMAND

Information on the demand for ecotourism is notoriously difficult to collect, due to the diverse nature of the sector. However, Lew notes nature tourism is the fastest growing sector of the tourism industry, demonstrating increases of 10 to 30% per annum¹⁰. Lindburg, a WTO expert on ecotourism estimates nature tourism contributes 7% of all international travel expenditures¹¹, and in 2000, WTO stated that ecotourism and all nature-related forms of tourism account for approximately 20 percent of total international travel. More recently, Wight (2002) surveyed a large number of ecotourism experts and operators and found a general consensus that the market is expected to grow at about 10% per year, above overall growth estimates for general travel, with the current demand estimated at 153.6 million international tourists.

If data internationally on ecotourism is sparse, in the South Pacific it is almost non-existent, based mainly on anecdotal evidence.

- In New Zealand, it is estimated that 30-50% of all international tourists engage in some kind of nature or cultural activity during their stay. Although it is difficult to suggest total revenues from nature tourism, in terms of returns to the Department of Conservation from tourism activities operating within protected natural areas, this is in the order of \$6 million per annum (TRC pers.com).
- Nash notes that eco-tour operators have growth rates of 10 percent to 25 percent in the Asia Pacific Region and states that "demand for quality eco-tourism destinations will continue to grow as urban congestion, pollution, crowding, and concern for the natural environment all increase."¹²
- SPTO suggest, as many of 20% of international tourists to the region may be backpackers, 82% of who are known to engage in ecotourism activities.
- Fiji estimate, Gross tourism receipts from eco-tourism for the year ended 2003 was \$6.5million.

Although these estimates provides different perspectives and are hard to compare, it seems likely that between 20-40% of all visitors to the South Pacific region (238,700-477,000 visitors based on 2004 figures) currently engage in some form of ecotourism. Where all the reports agree is that demand for ecotourism is likely to grow at a rate of between 10-20% a year.

MARKET ANALYSIS

In order to assess the demand for the kind of products and services PETA might be able to provide, three different levels of stakeholder consultation were carried out: NTO questionnaires, tourism industry questionnaires and face-to-face interviews. The results of this research are discussed here.

NTO QUESTIONNAIRES

In order to obtain baseline information about any existing ecotourism association, and collect views on the development of a regional ecotourism association, a questionnaire was sent to all 12 SPTO NTOs (a copy of the questionnaire is included in the appendix). Nine NTOs responded to the initial questionnaire, the remaining three were the target of secondary research and follow-up emails. The information collected is described below:

- In answer to question 1: "Are any of these associations in place in your country (tourism, hotel, ecotourism, other)" All SPTO member countries stated that they have a tourism industry association with the exception of Tuvalu and Kiribati. Only three countries reported active ecotourism associations.
- In response to question 1b: "If you have an Ecotourism Association, what are its main roles?" Of the three countries that reported active ecotourism associations, their primary role was marketing and networking and secondary roles included environmental education and awareness.
- In response to question 2: "Do you support the development of a regional ecotourism association in practice", all but three member countries said yes, one was undecided.
- In response to question 3: "What products or services would you like to see a regional ecotourism association providing?" Most NTOs who responded positively, ticked all the boxes listed, which included: developing ecotourism standards, collaborative marketing, promoting environmental best practice and awareness, and monitoring the impacts of tourism.
- In response to question 4: "Who do you think should fund a regional Ecotourism Association?" there was a range of answers, four saying SPTO and its members, two saying ecotourism operations, one saying donors and several others unsure.

In the comments section, whilst most NTOs appeared in favour of PETA in principle, in practice many have concerns about how such an association would be run and implemented.

OPERATOR QUESTIONNAIRE

A similar questionnaire was distributed to private sector operators. Ten were received back, mostly from Fiji.

- In answer to question 1: "Are you currently a member of any of the following organisations (tourism, hotel, ecotourism, other)" All respondents were a member of some type of tourism industry association, most were local associations.
- In response to question 1b: "If you are a member of an Ecotourism Association, what are its main roles?" Only 3 respondents were members of an ecotourism association. They noted its roll in lobbying government, joint marketing and as a forum to meet peers.
- In response to question 2: "Do you support the development of a regional ecotourism association", all but two respondents said no or were not sure.
- In response to question 3: "What do you see as the primary task of such an association?" Respondents mentioned the provision of guidelines, information exchange, standards and ecotourism policy.
- In response to question 4: "Who do you think should fund a regional Ecotourism Association?" there was a range of answers, four saying SPTO and its members, two saying ecotourism operations, one saying donors and several others not sure.

In summary, this small sample suggested that ecotourism operators are more sceptical of the idea of PETA than NTOs, perhaps concerned that the financial burden would fall on their own shoulders and also wary of the poor performance of already existing national associations. Further insights were obtained through more in-depth interviews.

FACE TO FACE INTERVIEWS

A total of 116 in-depth interviews (32 public, 48 private and 36 non-profit sector individuals) were carried out in 5 countries (Fiji, Samoa, Cook Islands, French Polynesia and Tonga), most in person but also, where necessary, by phone. There were four main areas of discussion on the subject of PETA: a discussion of ecotourism and the issues faced, a discussion of the desirability of setting up PETA, ideas for the possible form and function of PETA and possible products and services to be provided by PETA. A sample of the comments is included below.

1. Issues faced in Ecotourism

Fiji's interpretation of ecotourism appears to be more focused on village-based tourism and providing additional income for village groups rather than environmental awareness. Stakeholders in Fiji were concerned about the number of unlicensed village-based operations, which were operating as ecotourism ventures without any particular environmental standards. However, they were not overly keen on the idea of an ecotourism association, their own having had limited success. They saw standards, guidelines and accreditation as very important. The key issues raised for ecotourism in Fiji were as follows:

- Land tenure/customary land bill, native land trust and forestry
- Inadequate EIA legislation, foreshore reclamation leading to changes in circulation of the water and subsequent erosion

- Large numbers of unlicensed operators lacking the fundamentals like water, drainage, and the skills to put these in place

In Cook Islands environmental issues were seen as very important despite the fact that there are currently very few ecotourism operations. There are significant concerns about pollution, and a strong desire to take action to improve the environmental performance of the industry. Already there are several operators leading the way in this respect. The key issues raised in terms of ecotourism were as follows:

- Eye irritation from swimming in the lagoon and the toxins released from green algae
- Domestic septic tanks and building on the foreshore
- Marketing and small business information

In Tahiti, nature-based tourism or *turisme verte* is in its very early stages. There is a small-scale movement towards broadening its resort-focus, but very little environmental concern at this point. The ecotourism situation was summed up by one of a leading tour operator *"There is very little environmental consciousness here – its all focused on customer satisfaction – on which manager promotions and bonuses are based."* Key issues for ecotourism were identified as:

- Lack of environmental consciousness and awareness
- The geographic spread of the islands

Respondents in Tonga were very enthusiastic about the idea of guidelines and had lots of good ideas for services and products PETA could provide. They requested information about suppliers of different sustainable technologies, but were also concerned about the cost of accessing the information through a membership-based association.

In Samoa there were mostly sceptical views about PETA and ecotourism in general. Respondents appeared wary of committing to another association, when they already had experience of a number of poorly performing national associations. A number saw training and an information base as a better way to address sustainability and environmental issues.

2. Desirability of PETA

Overall there were mixed views about PETA, some vaguely positive and others vigorously opposing the idea. It certainly was not a unanimous vote of support for the concept as can be seen from some of the comments from stakeholders:

- *"I am not in favour of having a separate organization, SPTO is already there so it should be a function of them. With all these Associations, implementation is the key"* (Samoa)
- *"There already exists SPTO and SPREP why create another bureaucracy, costing a lot of money to set up and establish"* (Tonga)
- *"We need more emphasis on green tourism (we are not ready for ecotourism) because they still break the rules. Activities are being developed. Maps and a charter would be very useful at a regional level as would training"* (Tahiti)

- *"Would not like to see this as just another Regional association that is on paper only."* (Niue)
- *"It could help assist the development of the industry but the key question is finance – who can pay for this?"* (Tonga)
- *"We need to sort out our national ecotourism association before we start a regional one."* (Fiji)
- *"PETA would become just another Regional Organisation drawing funding from a lessening pool. Ecotourism is too diverse and each country is quite different."* (Fiji)
- *"I think a regional approach is good, but also has inherent difficulties, with localizing offices etc. I think it would be useful to have an association, in part because I am not clear on how a network would really work and whether it carries the same strength of an association."* (Fiji)
- *"SPTO is already struggling, members don't see enough benefits, why stretch it further."* (Samoa)

3. Form and Function of PETA

When given the chance to state their own views on the form and functions of PETA, stakeholders were much more thoughtful and enthusiastic. Here is a selection of the comments:

- *"The ecotourism association should be web based, have interactive resources, provide downloadable items, chat room, links to Codes and charters, speakers, interns to update. It would add value to existing SPTO benefits of membership."* (Cook Islands)
- *"PETA is a nice idea but different people will have different ideas. A hub or website idea is much better. It would be good to have 2 people to run it. It could be funded by concessions from hoteliers."* (Samoa)
- *"PETA should be within SPTO and have a specialist ecotourism person".* (Samoa)
- *"PETA should not be membership-based, SPTO is thought too expensive already. An information centre would be better and could provide guidelines for different activities and how they are enforced in other countries. Case studies of best practice and suppliers of things like composting toilets would be useful."* (Tonga)
- *"It could be an information clearing house, it should identify sources of donor funding and how to get advisors. The little private sector can't afford anything."* (Tonga)
- *"Ecotourism should be about education, PETA should be free – paying for marketing and memberships takes operators so long to organise its not worth it."* (Samoa)
- *"PETA is a good idea to further regional integration, everyone is doing their own system currently. SPTO may need to find a partner organization, and charge fees to make people have commitment. It could be set up as a series of steps, first network the association with benefits and then as a Policy arm of SPTO."* (Samoa)

4. Products and Services for PETA

There were also many good ideas from stakeholders about what services and products were needed. Here are some of the comments; those that are particularly useful have been underlined:

- *"PETA should provide guidelines and best practice models. We need to develop a fully integrated package for ecotourism."* (Fiji)
- *"I am in favour of ecotourism association for environmental information on waste and recycling, I am also in favour of code of practice, to focus on staff and provide some guidelines for them."* (Fiji)
- *"Guidelines and accreditation would be very useful to address environmental management issues, many people are unclear what ecotourism means."* (Fiji)
- *"Key areas for ecotourism are business development, marketing and signage"* (Cook Islands)
- *"What is needed is the sharing of Pacific ecotourism experiences. To find out who is doing what in the south Pacific."* (Cook Islands)
- *"PETA could help with whale watching guidelines, regulation and reef conservation issues. You could use it to spread good news stories. Could be a feel good factor for membership fees so its open to all but funded in part by SPTO membership."* (Tonga)
- *"We would like PETA to provide information on solar energy, composting toilets network with others who have gone eco and find out the pitfalls and suppliers. Suppliers could advertise, but small operators have little money for membership fees."* (Tonga)
- *"PETA could be interesting if it had information on waste and compost, birds, ecotourism destinations around the Pacific."* (Tonga)
- *"PETA should provide advisors – if the purpose is to help then they need people that can help and know something about hotels managing the system"* (Samoa)

TECHNICAL ANALYSIS

In order to ensure the study was grounded in existing best practice, it was important for the technical analysis to examine the form and function of successful ecotourism associations around the world as well as the challenges facing South Pacific associations.

FORM AND FUNCTION OF ECOTOURISM ASSOCIATIONS

The information presented here is a result of extensive web-based research of existing ecotourism associations and organisations internationally, backed up by personal communication with selected associations. The results of the survey are shown in Table 1. In selecting associations for inclusion in the table, efforts were made to show a range of different types of associations from international to local and from marketing to education-based. Examining the strengths and weakness of these organisations, helps assess the technical viability of PETA as well as providing ideas for the products and services it could provide.

BACKGROUND

There are a large variety of ecotourism associations, organisations, institutes and centres for ecotourism in existence worldwide. A web-based survey resulted in over three million references to 'ecotourism association'. Of the ten associations investigated in depth, two were international, one regional, five were national and two were state-wide. All the organisations reviewed have been in existence less than 15 years; most were established in the mid 1990s, following Agenda 21.

PURPOSE & ROLES

The function of the ecotourism associations reviewed varied from purely marketing and networking between ecotourism operators in the case of the Mexican Association of Adventure and Ecotourism, to purely research in the case of the Centre for Ecotourism and Sustainable Development, to certification in the case of Ecotourism Australia.

Whilst some Associations have a fairly narrow brief, as is the case with Ecotours New Zealand and their photographic listing database, others try to do everything, with services ranging from eco-rating to annual conferences, research and newsletters. The Kenyan and Caribbean ecotourism organisations are good examples of this type of comprehensive approach. Others, such as the Fiji Ecotourism Association, have suffered from lack of member commitment and political unrest.

Common to most associations, however, is the aim to promote of higher standards of ecotourism operation through education and projects to protect the resource base, including community participation. Examples of ecotourism associations aims include to:

- Design, monitor, evaluate, and improve ecotourism
- Promote tourism practices that will conserve Kenya's natural environment
- Contribute to the ongoing development and active inclusion and involvement of local communities
- Assist hotel and tourism operators in the Caribbean region achieve the goals of Agenda 21
- Promote a network of ecotourism operators practising sustainable tourism

The following box outlines the Kenya Ecotourism Association flagship project, its eco-rating scheme.

Eco Rating

The ESOK Eco-rating Scheme is a voluntary initiative by the Kenyan tourism industry, designed to further the goals of sustainable tourism by recognizing efforts aimed at promoting environmental, economic and social/cultural values. Eco-rating can be defined as a systematic approach for verifying a tourism organisations performance when evaluated against an agreed suite of criteria (environmental/social/cultural). The focus of the scheme is tourism businesses interested in and committed to embracing "best practice" in their operations. The criteria covers environmental and socio-economic issues. Emphasis has been given to sustainable use of resources and protection of the environment. It also includes support to local economies through linkages, and capacity building for local communities and employees. There are three levels of certification namely; Bronze, Silver and Gold. Qualification for either of the levels will depend on the total scores earned from the assessment questionnaire. There will be a self-assessment by the applying facility, followed by an external audit before certification is awarded.

Source: www.esok.org

ACTIVITIES

Many ecotourism associations have their own charter or code of conduct that acts as a guide to their activities. In fact, it is often the activities and events organised that make the difference between an association that's good on paper, and one that is actually moving towards its goals. Examples of common activities amongst ecotourism associations and organizations include:

- Identifying standards and developing certification programmes
- Highlighting success stories from best practice operators
- Writing newsletters to keep the industry informed of relevant events
- Research and publication of information relevant to tourism
- Organising promotional and training events
- Funding-raising activities for conservation and community projects (see the example below from the Alaska Association)

Dollar-a day for Conservation

Many polls and surveys of visitors indicate that a majority of visitors are willing to pay more for an ecologically sound tourism experience. In keeping with Alaska Wilderness Recreation & Tourism Association (AWRTA) Ecotourism Guideline #7 which states, they will "implement a program for business and guests to contribute to local non-profit efforts for environmental protection", AWRTA has set up an innovative funding mechanism for environmental and conservation groups. The Dollars a Day for Conservation program channels tourist dollars to habitat and wildlife conservation efforts. During 2001, 35 AWRTA business participants of the program raised over \$25,000 for conservation organizations. Implementing AWRTA's Dollars a Day for Conservation program is promoted to operators as a means of distinguishing their business as one that offers their guests the opportunity to directly contribute to the protection of Alaska's natural resources.

Source: www.awrta.org

MEMBERS & MEMBER BENEFITS

Membership of ecotourism organisations generally involves payment of an annual membership fee and provides marketing, networking and other benefits such as reduced rates for annual conferences. There are normally several different levels to membership such as individual, commercial and sponsor. Membership is mostly open to everyone from tourists to government ministries. Whilst some have information and resources freely available, others allow only members to login to access market information. Those association that are not membership based, normally provide the opportunity for sponsorship or listings in exchange for fees such as the Caribbean Alliance for Sustainable Tourism.

Friends of the Caribbean

Instead of having members, CAST provides different sponsorship opportunities. Friends of CAST are a fund raising initiative targeted at Caribbean nationals, visitors, organizations or anyone interested in preserving the Caribbean and supporting the CAST mandate. Individuals can become "Individual Friends" by making contributions of \$20, \$25, \$50, \$100 or more. A hotel or business can become a "Corporate Friend" by making a financial contribution in the amounts of \$100, \$150, \$200, \$250 or any other desired amount. This can either be done as a one-time donation or an ongoing contribution. Friends are listed on the CAST website unless specified otherwise. Sponsors can also identify programs or staff they wish to sponsor such as interns, by providing in-kind contributions, prizes for auction and training courses.

ADMINISTRATIVE AND FINANCIAL STRUCTURE

Most of the associations and organisations reviewed are non-governmental and non-profit. Some such as TIES, however, have a profit-making arm with an on-line store, and educational resources and educational institutions such as CESD, which has government backing, and focuses on policy-orientated research.

In terms of their administrative structure, ecotourism associations tend to have a Board or Executive Committee. These members are generally individuals with significant amounts of experience and standing in the ecotourism community, most running their own businesses or involved in other non-profit organisations. The role of the Board or committee in most cases is to review and approve the annual budget and work programme of the association. The ecotourism associations reviewed have between one and three full-time employees. These staff manage the website, coordinate projects and identify sources of funding. The following is a result of personal communication with Ecotours New Zealand.

Interview with Ecotours New Zealand

How many members do you currently have?

"We have about 100 members. We abolished free listings a few months ago so now have about 35 listed. We have all the major players in genuine ecotourism in New Zealand with the sole exception of Whale Watch Kaikoura who choose to do their own Web marketing. New Zealand is a small place and everyone knows who the real ecotourism operators are. I do not list a new operator until I have run them past several other members of the network. This is to avoid operators who use the "eco" label as a marketing ploy - which is a huge bug bear of existing operators."

How is the association administered?

"Essentially I am the web site technician. Ecotours New Zealand is a group marketing initiative and a network of genuine ecotourism operators throughout New Zealand. My job is to market their activities on the Web."

Can you tell us about how the association is funded - can you survive on the income from listings alone?

"Ecotours New Zealand is funded through operator subscriptions to the website. I cannot survive on the income from listings alone. It is really a labour of love. I have had 25 years experience in the computer industry and decided to use my skills for a cause that I am passionate about - that is sustaining New Zealand's natural environment. My main income is through developing web sites."

Source: Personal correspondence, Jan Malone Ecotours New Zealand 5/5/05

It seems it is very unusual for an Ecotourism association to actually be profitable. Most are non-profit, slightly or highly subsidised and their financial structure can severely influence the kind of activities they can undertake. Many survive barely on membership dues, others have successful sponsorship schemes or receive substantial government subsidy or in kind assistance. Associations have become an attractive mechanism for donor funding in recent years particularly in the South Pacific, being a clear display of stakeholders working together for mutual benefit.

WEB SITES

There was great range and diversity in the form and function of the association websites reviewed. Whilst some gave the impression of a very active organisation, others looked like they had not been renewed for some time. Some of the factors that appear to make the difference include:

- Transparency – identifying staff members and their background gives credibility and transparency to the association
- Personal touch – a picture of the administrator with contact details helps give the impression of a personable association
- Flagship – it seems to be easy to justify membership of an association if there is a clear primary project such as accreditation, awards or training
- Member recognition – highlighting members and sponsors is a good way of keeping the association current
- Member benefits – It is important to have clear and visual incentive to join the association,
- Activities – the site needs to give a clear idea of what is happening with the association and how they can be involved

- News – having easy to read interesting sector-based news available gives members something to return to the site for

The Kenyan Ecotourism Site is particularly useful in terms of its layout and design and very clear explanation of projects in action. The Caribbean example is useful as an example of a regional organisation. Ecotours New Zealand is presented more like a popular ecotourism magazine.

Other websites and organisations that have been inspirational in the following recommendations include:

- ❖ PESTNET (www.pestnet.org), and e-mail network that helps people in the Pacific and South East Asia obtain rapid advice and information on plant protection, including quarantine and pest identification.
- ❖ Green Network (www.greennetwork.dk), in Denmark which promotes environmental best practice amongst business owners and operators.
- ❖ Green pages (www.eco-web.com) an online gateway to environmental products and services

Interview with PESTNET

How long have you been in operation?

"Since December 1999"

How many requests are you getting a week?

"We are averaging 75 emails a month"

Are the moderators paid or voluntary?

"All voluntary - we do not take money for our core function - only for projects if we are lucky enough to get them funded. This is one of our strengths: we are sustainable"

Who does the web-site maintenance?

"A firm in India, I chose them as I have a colleague there and he recommended them. Costs about \$A450 a year."

How is PESTNET funded?

"No funds, as I say, except for projects. If I told you we have \$500 in the bank, you might laugh! Mostly the moderators pay for stuff and then reclaim if and when. Great business model, but then we did not set up PestNet to become rich - just as well. Ausaid helped through a grant to DAFF Australia (agriculture fisheries forestry) under an apec scheme. It was an expensive site as it was designed to be light and fast for developing country access, and we can upload stuff using asp software."

Source: personal communication, Grahame Jackson 12/8/05

Association Name	Background	Purpose & roles	Activities	Members	Member benefits	Structure
TIES www.ecotourism.org	Founded 1990, oldest and largest ecotourism Association worldwide	Promotes responsible travel to natural areas that conserves the environment and improves the well being of local people.	<ul style="list-style-type: none"> - Year of ecotourism - Developing guidelines - Green certification Programmes - Networking - Education 	Members in more than 70 countries including all sectors of tourism industry and tourists. 4 types of members and sponsor possibility	<ul style="list-style-type: none"> - Magazine - Training - Trade fairs - Statistics - Resource base - Use of logo 	Board of Directors, full time employees
Ecotourism Australia www.ecotourism.org.au	Founded 1991, as Non-Profit Organisation	Growing, consolidating and promoting ecotourism and other committed tourism operations to become more sustainable	<ul style="list-style-type: none"> - Ecotourism standards and certification for operators and guides - Conferences - Resource base 	Ecotourism operators, tourists and tour guides.	Access to resources Certification programme	Board of 12 and a F/T CEO
Centre on Ecotourism and Sustainable Development www.ecotourismcesd.org	Launched in 2003, is a joint project of the Institute for Policy Studies and Stanford University	CESD uses policy-oriented research to design, monitor, evaluate, and improve ecotourism, as well as to promote sustainable practices and principles within tourism.	<ul style="list-style-type: none"> - Sustainable tourism in Mexico & Cruise - Research projects - Writing publications - Participating in conferences 	No individual members but partnerships with other international organisations such as UNEP, TIES and the Rainforest Alliance.	<ul style="list-style-type: none"> - Organizing ecotourism courses and seminars 	Coordinator and a finance administrator, two executive staff. Also 7 staff members at Stanford Uni and numerous interns
Ecotourism Society of Kenya (ESOK) www.esok.org	Founded in 1996 to provide a forum for the concept of ecotourism and use this knowledge to improve performance in line with the principles of ecotourism.	Promotes tourism practice that will conserve Kenya's natural environment and improve livelihoods of associated communities as well as provide leadership in standards for best practice tourism and ensure equity for stakeholders.	<ul style="list-style-type: none"> - Eco rating scheme - Education communities - Annual general meeting - Research on state of resource base - Community mentor scheme - Energy efficiency 	Almost 100 members: tour operators; hoteliers; travel agents; travel trade suppliers; tourism and conservation associations etc. (corporate, individual and community membership possible)	<ul style="list-style-type: none"> - Participating in ecotourism initiatives - Networking - Newsletter - Discounted conference fees 	Secretariat has a management committee and 3 F/T staff in Secretariat: Executive Officer (also Projects Coordinator) Community Projects Officer and a clerk
Mexican Association of Adventure tourism & Ecotourism (AMTAVE) www.amtave.org	Established in 1994, a national org. for outfitters dedicated to the operation and promotion of ecotourism in Mexico.	To promote and protect ecotourism and adventure-related activities and sites in Mexico, contributing to the ongoing development of local communities.	<ul style="list-style-type: none"> - Code of Conduct - Marketing opportunities - Meetings - Event organisation 	60 Members, all adventure and ecotourism operators	<ul style="list-style-type: none"> - Web site listing - inclusion in marketing activities - peer support 	Executive Board, General Manager, and a coordinator/ representative for each state

Association Name	Background	Purpose & roles	Activities	Members	Member benefits	Administrative Structure
Caribbean Alliance for Sustainable Tourism www.chacast.org	Started in 1997, a subsidiary of the Caribbean Hotel Association	Undertakes collaborative environmental activities within the hotel and tourism sector, assisting hotel and tourism operators in the Caribbean region achieve the goals of Agenda 21 for sustainable.	<ul style="list-style-type: none"> - Standards & certification - Promoting industry best practice - Advocacy for sustainability - Fund raising - Quarterly newsletter - Monthly letter for certified properties 	No members but options to become a 'friend of CAST', or sponsor staff or particular projects.	<ul style="list-style-type: none"> - Listed on website 	Led by a Governing Council that meets to review CAST programs and approve budget. Has a F/T Director, program manager and affiliates
Alaska Wilderness, Recreation & Tourism Association www.awrta.org	A state-wide members-driven trade body formed to be a collective voice for wilderness-dependent businesses.	Advocates for the sustainability of Alaska's natural and cultural resources, responsible tourism and tourism planning for communities.	<ul style="list-style-type: none"> - Marketing - Annual conference - Fund-raising dollars a day for conservation - Newsletter 	Nature-based businesses, organisations & individuals	<ul style="list-style-type: none"> - Resources for businesses - Annual conference - Link to AWRTA website 	9 Board members, one F/T Executive Director
Ecotours New Zealand www.ecotours.co.nz	Directory & guide to ecotourism operations in New Zealand	<ul style="list-style-type: none"> - To collectively promote a network of ecotourism operators practising sustainable tourism in New Zealand. - To provide a resource centre for environmentally concerned visitors to New Zealand. 	<ul style="list-style-type: none"> - Promotion - Photographic listing of ecotourism operators - Networking - Marketing - Journalistic articles - Message board 	Apply for listing, may be removed if they contravene ecotourism practices	<ul style="list-style-type: none"> - Website listing 	Part-time voluntary web-manager
Fiji Ecotourism Association www.sidsnet.org/eco-tourism/fea.html	Formed in 1995 with the objective of consolidating all interested parties in ecological, historical, cultural, nature based tourism activities.	Aimed to consolidate operators in one organization, develop an accreditation system, reward best practice, monitor the impact of ecotourism activities.	<ul style="list-style-type: none"> - Web site - Collaborative Marketing - Success stories 	<ul style="list-style-type: none"> - Ecotourism operators - Lodging providers 	<ul style="list-style-type: none"> - Marketing - Networking 	Committee – currently non-functional
Hawaii Ecotourism Association www.hawaiiecotourism.org	Formed as an outcome of the statewide Conference on Ecotourism in Waikiki in October of 1994	To protect Hawaii's unique environment and culture through the promotion of responsible travel and educational programs aimed at the public and visitor industry	<ul style="list-style-type: none"> - Hawaii Pono certificate - Ecotourism Awards - Annual conference 	<ul style="list-style-type: none"> - Ecotourism operators - Travel agencies - Government dept - Tourists, Hotels 	<ul style="list-style-type: none"> - Listing on website - Access to resources - Special events 	Board of directors, and one administrator

TOURISM ASSOCIATIONS IN THE SOUTH PACIFIC

In order to gain understanding for the kinds of issues faced by tourism associations and organizations in the Pacific, a review of the form, function, strengths and weaknesses of existing South Pacific tourism associations was also carried out, based on interviews and electronic correspondence with associations. The following comments are a balanced example of those received:

- *"The demise of the association was a result of the poor selection of people who comprise the committee/executive. Unfortunately this is based on the rest not totally understanding what they are signing up to. It would also help if core funding was available to hire good staff to run the central offices rather than relying on the goodness and charity of the volunteers who make up the elected committees."* (Samoa)
- *"The association goes up and down with the committee. Previously there was a lack of consultation. Now they are relatively good at identifying and acting on local issues."* (Tonga)
- *"The association has not really happened due to members' business interests."* (Samoa)
- *"The association used to promote cleanliness and security but its was too hard to make people work together and issues arose over pricing"* (Samoa)
- *"There was a clear lack of ability to work together seen in Marine Tourism Operators Association"* (Samoa)
- *"The really interesting thing is how some operators (this is where the case studies are useful) put a lot back into conservation work through grants, active work on pest control, monitoring species presence/absence etc and generally being active guardians of the wildlife on which their businesses depend - hence, there are some world class partnerships going on which is great to see."* (New Zealand)

Table 2 presents some examples of associations that have managed to work together.

Table 2. Selected Tourism Associations in the South Pacific

Association	Background	Purpose & roles	Activities	Members & benefits	Strengths & Weaknesses	Structure
Samoa Hotel Association www.samoahotels.ws	Since its initial set up in 1999, SHA has grown to become the most significant and active tourism Industry Association in the country	To develop, enhance and market the hospitality industry through profitability, standards & sustainability	<ul style="list-style-type: none"> - e-booking system - lobbying government - Collaborative marketing - Networking - Conference organising 	<ul style="list-style-type: none"> Hoteliers in Samoa - website listing - Networking - Hospitality training - Administrative office 	High participation of hoteliers, effective e-booking systems showing tangible member benefits, felt to be excluding other parts of industry	Executive Committee, F/T administrative officer and assistant. Membership fees cover basic costs, projects need external funding.
Vavau Tourism Association		Provides information and a collective voice to government	<ul style="list-style-type: none"> Training, first aid, environmental issues - marketing cooperation - lobbying airlines 	<ul style="list-style-type: none"> Most successful hoteliers and operators - marketing - networking 	Good membership base, but dependent on the committee some feel its exclusive to successful businesses	Small Executive, administered from the Tongan Visitors Bureau, supported by members.
Fiji Hotel & Tourism Association www.fha.com.fj/	Conceived in 1965, one of the oldest associations in the region	Marketing & research Industrial Relations Human Resources Customary Rights & Relationships with Resource Owners	<ul style="list-style-type: none"> - Bar person of the year - Marketing - Networking - Star rating system - Lobbying government 		Strong voice for lobbying government, felt by some to only include the big players	Board with executive committee meets monthly, actions carried out by Executive Director and 2 administrators.
PNG Industry Association www.png.aqualagoon.com/png/cms/pngtia/pngtiaindex.htm	The PNGTIA is a non-profit organization incorporated on the 24 January 2001	To develop, promote, encourage and stimulate the tourism industry in Papua New Guinea	<ul style="list-style-type: none"> - Marketing - Networking 	<ul style="list-style-type: none"> - Develop professional contacts, networking and attend events 	- no response	Small executive, no permanent staff
Vanuatu Tourism Operators Association www.vanuatu-tourism.com/	Formed in 2002 for the promotion and protection of tour operations throughout the Republic of Vanuatu.	Collection & distribution of information for use to tour operators Representing tour operators to government	<ul style="list-style-type: none"> - Joint marketing - Lobbying government - Reports on the industry development - Monthly debates - Input into national tourism development 	<ul style="list-style-type: none"> - Recognition by the Vanuatu Government - Inclusions in NTO website & national promotions - Recognition - Use of VTOA logo 	Good membership but limited funds and capacity for activities	Executive committee only, no full-time staff

Factors influencing success appear to be:

- Committee members – an association can rise or fall on the strength of its executive committee. A frequent problem in the region appears to be the fast turnover and lack of experience of association executives. Other concerns are conflicts of interest, clash of personalities, lack of time and motivation for attending and organizing meetings.
- Permanent staff – taking the step of employing a permanent staff is a way around of these difficulties, taking the pressure of the Executive. Finding the funds to make this possible, however, may be a struggle. The Samoa Hotel Association made this happen by developing their e-booking system.
- Strategic/Business plan – in contrast to the international ecotourism associations shown in Table 1, many of the South Pacific Associations reviewed appear to function in a reactionary manner, without a clear plan of action or work programme. Having regular flagship, training or marketing events appears to assist this problem and help focus activities
- Membership fees – due to the low levels of profitability, many operators consulted during this study were not interested in paying membership fees to a regional association, particularly if they were already members of SPTO. They regarded that PETA should be an added-value element of the SPTO membership.

FINANCIAL ANALYSIS

This section examines the financial situation for PETA, first as a conventional membership-based association and second as a lightweight web-based organisation, the Green-hub that will use SPTO as its home. The first page examines the costs and revenues and the basis on which the analysis is made, the second page presents and profit and loss and cash flow statements.

PETA COSTS & REVENUES

Set-up Costs (capital expenditure)

Office equipment	FJ\$ 5,000
Web site design	FJ\$20,000
Website content	FJ\$ 9,000
Recruitment	FJ\$ 500

Running Costs (operating expenditure)

Office rental	FJ\$80,000
Utilities	FJ\$ 1,500
Salaries	FJ\$45,000
Office supplies	FJ 5,000
Web site maintenance	FJ\$ 1,000
Annual conference	FJ\$10,000

[Additional project costs FJ50,000 a year are dependent on donor funding e.g. year 1. accreditation, year 2 Distance Learning Module, year 3, Ecosuppliers Expo.]

Potential Revenues (receipts), Year 5

Membership fees	FJ\$7,500
Advertising revenue	FJ\$3,750
SPTO funding	FJ\$5,000
Donor funding	FJ\$50,000 (year 1 only)

Assumptions (mid-range estimates on the basis of stakeholder comments)

1. Members expect incentives such as an annual conferences.
2. Salaries include a F/T Director & P/T administrator.
3. Membership fees 75 @ FJ100 (50% of all SPTO members also become PETA members by year 5).
4. Advertising revenue from 15 suppliers @ FJ250 by year 5.
5. SPTO funding of up to FJ5,000 is available to supplement revenues up to year 5.
6. One-off Donor funding of FJ\$50,000 is available to cover start-up costs.
7. Depreciation on office equipment, web design and web content is calculated by the straight-line method, at 20% per annum. Expected rest value is nil.

Recommendation

A review of Table 3 & 4 show that as a membership-based association with an office, based on the mid-range assumptions above, PETA is not an economically viable proposition. The additional income from membership would not be able to offset the costs of running an office and having the additional staff. Even using the SPTO office, it is still unlikely that PETA can attract enough members to be sustainable.

Table 3. PETA Cash Flow Forecast

	Year 1	Year 2	Year 3	Year 4	Year 5
Receipts					
Receipts from membership	1,500	3,000	4,500	6,000	7,500
Advertising revenue	1,000	1,500	2,000	2,750	3,750
SPTO funding	5,000	5,000	5,000	5,000	5,000
Donor funding	50,000	0	0	0	0
Total cash receipts	57,500	9,500	11,500	13,750	16,250
Cash payments					
<i>Capital expenditure</i>					
Office equipment	5,000				
Web site design	20,000				
Website content	9,000				
Recruitment	500				
<i>Total capital expenditures</i>	34,500	0	0	0	0
<i>Operating expenditure payments</i>					
Office Rental	80,000	80,000	80,000	80,000	80,000
Utilities	1,500	1,500	1,500	1,500	1,500
Salaries	45,000	45,000	45,000	45,000	45,000
Office supplies	5,000	5,000	5,000	5,000	5,000
Website maintenance	1,000	1,000	1,000	1,000	1,000
Annual conference	10,000	10,000	10,000	10,000	10,000
<i>Total operating expenditures</i>	142,500	142,500	142,500	142,500	142,500
Total payments	177,000	142,500	142,500	142,500	142,500
Net cash flow	-119,500	-133,000	-131,000	-128,750	-126,250
Opening bank balance	0	-119,500	-252,500	-383,500	-512,250
Closing bank balance	-119,500	-252,500	-383,500	-512,250	-638,500

Table 4. PETA Profit and Loss Sheet

	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue					
Membership fees	1,500	3,000	4,500	6,000	7,500
Advertising revenue	1,000	1,500	2,000	2,750	3,750
SPTO funding	5,000	5,000	5,000	5,000	5,000
Donor funding	50,000	0	0	0	0
	57,500	9,500	11,500	13,750	16,250
<i>Less operating expenses</i>					
Office rental	80,000	80,000	80,000	80,000	80,000
Utilities	1,500	1,500	1,500	1,500	1,500
Salaries	45,000	45,000	45,000	45,000	45,000
Office maintenance	5,000	5,000	5,000	5,000	5,000
Website maintenance	1,000	1,000	1,000	1,000	1,000
Annual conference	10,000	10,000	10,000	10,000	10,000
Depreciation	6,800	6,800	6,800	6,800	6,800
Total operating expenses	149,300	149,300	149,300	149,300	149,300
Net profit/income	-91,800	-139,800	-137,800	-135,550	-133,050

GREEN-HUB COSTS & REVENUES

Set-up Costs (capital expenditure)

Web site design	FJ\$20,000
Website content	FJ\$ 9,000
Recruitment	FJ\$500

Running Costs (operating expenditure)

Administrator Salary	FJ\$25,000
Web site maintenance	FJ\$450

(Additional Project costs FJ50,000 a year (dependent on donor funding e.g. year 1. accreditation, year 2 Distance Learning Module, year 3, Ecosuppliers Expo.)

Potential Revenues (receipts), Year 5

Individual Friends (150)	FJ\$7,500
Corporate Friends (75)	FJ\$11,250
Advertising revenue (15)	FJ\$3,750
SPTO funding	FJ\$5,000
Donor funding	FJ\$50,000 (year 1 only)

Assumptions (mid-range estimates on the basis of stakeholder comments)

1. It is more attractive for operators and tourists to become "friends" voluntary sponsors than members. Friends are less demanding and more supportive.
2. Donor funding of FJ50,000 is identified to cover start/up costs
3. SPTO funding of up to FJ5,000 per year is available up to year 5
4. At least 150 individuals (owner/operators and tourists) become friends of the green-hub by year 5 @ FJ\$50 each
5. At least 75 corporations become friends of the green-hub by year 5 @FJ\$150
6. At least 15 ecosuppliers sign up for Green hub marketing @ \$250
7. Depreciation on web design and web content is calculated by the straight-line method, at the rate of 20% per annum. Expected rest value is nil.

Recommendation

A review of Tables 5 and 6 shows the Green-hub, with one full time administrator and using office equipment already available at SPTO, is likely to have a positive net cash flow by year 5, based on the assumptions provided. Additional projects such as conferences or accreditation will need to be donor-funded. There is a good chance that the Green-Hub could attract a specialised Australian Youth Ambassador (AYAD) for one year, but this person should be seen as additional to rather than instead of the administrator.

It should be noted that the Green-hub's viability by year 5 will depend on the success of attracting 'friends' and eco-suppliers. In the event that this is not as successful as expected, the additional support of SPTO or donor funding will be necessary to keep the Green-hub afloat.

Table 5. Green-hub Cash-flow Forecast

	Year 1	Year 2	Year 3	Year 4	Year 5
Receipts					
Friends of Green Hub (individual)	1,500	3,000	4,500	6,000	7,500
Friends of Green Hub (corporate)	1,800	3,750	7,500	9,000	11,250
Advertising revenues	1,000	1,500	2,000	2,750	3,750
SPTO funding	5,000	5,000	5,000	5,000	5,000
Donor funding	50,000	0	0	0	0
Total cash receipts	59,300	13,250	19,000	22,750	27,500
Cash payments					
<i>Capital expenditure</i>					
Web site design	20,000				
Website content	9,000				
Recruitment	500				
<i>Total capital expenditures</i>	29,500	0	0	0	0
<i>Operating expenditure payments</i>					
Salary administrator	25,000	25,000	25,000	25,000	25,000
Website maintenance	450	450	450	450	450
<i>Total operating expenditures</i>	25,450	25,450	25,450	25,450	25,450
Total payments	54,950	25,450	25,450	25,450	25,450
Net cash flow	4,350	-12,200	-6,450	-2,700	2,050
Opening bank balance	0	4,350	-7,850	-14,300	-17,000
Closing bank balance	4,350	-7,850	-14,300	-17,000	-14,950

Table 6. Green-hub Profit and Loss Sheet

	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue					
Individual 'Friends'	1,500	3,000	4,500	6,000	7,500
Corporate 'Friends'	1,800	3,750	7,500	9,000	11,250
Advertising by suppliers	1,000	1,500	2,000	2,750	3,750
SPTO funding	5,000	5,000	5,000	5,000	5,000
Donor funding	50,000	0	0	0	0
	59,300	13,250	19,000	22,750	27,500
<i>Less operating expenses</i>					
Salary administrator	25,000	25,000	25,000	25,000	25,000
Website maintenance	450	450	450	450	450
Depreciation	5,800	5,800	5,800	5,800	5,800
Total operating expenses	31,250	31,250	31,250	31,250	31,250
Net profit/income	28,050	-18,000	-12,250	-8,500	-3,750

SUMMARY AND RECOMMENDATIONS

Based on the information collected during this study a summary of the key considerations in terms of market, technical and financial feasibility of establishing PETA is presented here.

MARKET FEASIBILITY

- Available information on tourism demand suggests that ecotourism will become an ever more important element of worldwide and also South Pacific tourism.
- It is estimated that between 20-40% of all visitors to the South Pacific region (238,700-477,000 visitors based on 2004 figures) currently engage in some form of ecotourism.
- The number of tourists interested in engaging in nature and ecotourism activities in the region is expected to increase at 10-20% per year.
- The number of ecotourism operators and demand for ecotourism operation guidelines and support is likely to increase in line with demand.
- There seems to be general agreement amongst both public and private sector stakeholders that SPTO has a role to play in assisting the sustainable development of ecotourism in the region.
- Regional stakeholders have stated their reluctance to support the idea of an additional membership based association, particularly if this is developed outside of SPTO's existing administrative structure.
- Many stakeholders have stated an interest in the development of a regional hub of information on ecotourism standards, guidelines and products.

TECHNICAL FEASIBILITY

- Contemporary thinking on ecotourism is that it is a valuable element of sustainable tourism and can help implement sustainable tourism policies and practices.
- There are a large number of ecotourism associations around the world that have been seemingly successful in combining efforts to conserve resources and support the development of sustainable ecotourism operations.
- Conventional membership based associations in the South Pacific face very different significant challenges. Many were found to have a relatively poor performance due to lack of time and experience of executive officers, along with insufficient funds to employ full-time staff.

FINANCIAL FEASIBILITY

- Regional stakeholders were found to be unenthusiastic about the idea of contributing membership dues to another regional association, particularly when this is a niche sector and not regarded in a positive light by all countries.
- As a membership-based association with its own Secretariat, PETA is not an economically viable proposition and is likely to accumulate significant losses. The additional income from membership would not offset the costs of running an office with staff. Even using the SPTO office as the secretariat, it is still thought unlikely to attract sufficient support to become sustainable.
- The Green-hub, with one full time administrator and using office equipment already available at SPTO, is likely to have a positive net cash flow by year 5, based on the assumptions provided. Additional projects such as conferences or accreditation will need to be donor-funded. However, it should be stressed that the Green-hub's viability by year 5 will depend on the success of attracting 'friends' and eco-suppliers. In the event that this is not as successful as expected, the additional support of SPTO or donor funding will be necessary to keep the Green-hub afloat.

As a result of the above summary, it is suggested that the Green-hub is a better all-round option for SPTO than PETA. The Green-hub is a network and information centre concept that does not create additional boards and committees but relies on the existing administrative set up of SPTO.

The Green-hub will not be exclusive to paying members but available to all, and funded through sponsorship opportunities and marketing for suppliers of eco-friendly technologies on the website.

The Green-hub would be designed specifically to meet the needs of ecotourism stakeholders as identified during the PETA consultations. It would not re-invent the wheel but be based solidly on best practice examples from around the world.

RECOMMENDATIONS

- PETA becomes SPTO's **Green-Hub** under the slogan "Meeting the needs of ecotourism operators in the South Pacific"

Administration

- SPTO is the Secretariat for the **Green-Hub**.
- A **Green-Hub** Executive of 3 members are elected from the existing SPTO Board and monitor the activities and budget of the **Green-Hub**
- An ecotourism website administrator is recruited to become the full-time **Green-Hub** administrator. Initial investigations have shown that it may be possible to attract an AYAD volunteer to assist this person for the first year.
- Four experienced tourism advisors are recruited as voluntary moderators for the advisors network

Primary Products and Services

- Guidelines & standards – this will provide links to the ecotourism code, Pacific Tourist Code, eco-rating tools and other tools such as accreditation and toolkit resources. The information will be focused on operators, NTOs and other interested stakeholders
- Database – provides links to international and regional statistics on ecotourism and an on-line survey of users. This will help improve the existing dearth of ecotourism information and data
- Advisors –moderated yahoo group staffed by volunteer advisors experienced in the region, providing advice on a range of environmental and ecotourism issues through e-mail contact.
- Success stories – collection of good practice case studies identified on an interactive map, with their developers ready to provide mentoring and advice to other interested operators.
- Green Theme – weekly feature articles, discussion and advice on common ecotourism operation issues e.g. composting, ecorating – the green theme will be incorporated in the SPTO weekly bulletin.

Secondary Products and Services

- Marketing – suppliers of ecofriendly technologies will be highlighted.
- Networking – links to partner ecotourism associations worldwide such as APEC's Centre for Sustainable Tourism (ACIST).
- Donors – up to date list of donors and grant schemes and where possible links to application forms.
- Community support – an opportunity for community ecotourism projects to be show-cased free of charge.

- Traveller’s Guide – Once the accreditation project is up and running a map would identify eco-destinations, protected areas and eco-activities. The map would highlight with web-site linkages, sustainable ecotourism projects in the region along with places to stay based on the accreditation project.

Additional project-based activities (where donor-funding is available)

- Accreditation project – the green-hub could develop a regional ecotourism accreditation project like SPTO’s accommodation classification framework
- Eco-suppliers expo – the green-hub could sponsor an eco-suppliers expo attracting suppliers of eco-friendly technology and linking them to tourism developers from around the region
- Ecotourism e-booking system – a project could be established to assist ecotourism operators link with operators overseas

Funding set-up

- Once the **Green-Hub** is set up efforts will be made to attract individual and corporate “friends of the green-hub”
- Donor funding is required for the initial set-up and SPTO project funding is required for the first four years of operation
- Efforts will need to be made to attract donor funding for the additional project-based activities noted above.

Table 7. Proposed Green-hub Contents

SPTO's Green-Hub Meeting the needs of ecotourism operators in the South Pacific

Guidelines & Standards	<p>Welcome to SPTO's Green-hub! <i>Whether you are an ecotourism operation, hotelier, tour guide or tourist, this is the site for you! We have everything from guidelines to on-line advisors and a traveller's information site.</i></p> <ul style="list-style-type: none"> ❖ Click on 'Friends of the Green-hub' to support this site and get marketing and other benefits. ❖ Learn from others in the success stories or submit you own story ❖ Find the latest ecotourism data ❖ Learn about eco-friendly technology that will suite your business 	Green Theme	Friends of Green-hub	
Information Database		Our theme this week is compost: the costs and benefits of biodegrading. We have examples of DIY composting bins and advise from the experts on keeping the rats away!	Friends of Green-hub	
Advisors Network		Partners		
Success Stories		Travellers Green-hub		
Suppliers		Suppliers	Suppliers	Suppliers

NEXT STEPS

If SPTO and its Board of Directors agree to the concept of the Green Hub in lieu of PETA as conventionally conceived, the next steps are envisaged in two phases: development and implementation. The activities to be undertaken in connection with each of these are described below.

Phase 1. Development (January – September 2006)

Business plan (5 days) – 5 days was originally earmarked in the project for the development of a business plan for PETA. The Green Hub business plan would include: the vision, mission and objectives of the Green Hub, job description for the administrator, identify a short-list of possible moderators, fund-raising and marketing strategy, proposals for flagship activities and action plan for the implementation phase along with the ecotourism code of conduct.

Fund-raising – Develop proposal and identify donor funding for the development of the website and content, design and layout.

Website Content (10 days) – This is estimated to require 10 days consultancy time to compile*. An outline of the suggested content is included in the appendix of this study (If the business plan is decided against, the 5 days allocated for this could be transferred to the web-site content project).

Web-site design & layout – This is a key part of the development phase and will require the identification of appropriate donor funding. More time and money spent here in creating a light and fast site for developing country access, will result in greater revenues later.

Administrator Recruitment – The Green hub administrator will ideally be a national of an SPTO member country with an ecotourism education (preferably university degree) and several years experience in managing a web site.

Volunteer staff – There maybe a possibility of attracting a skilled volunteer to assist with this programme for the first 1-2 years which would help off-set costs. An AYAD youth Ambassador would be an ideal candidate. Apply for Australian Youth Ambassador through the AYAD country managers in Fiji. [Bob and Jennie Teasdale, teasdale@connect.com.fj Tel: 3232781].

Moderator Recruitment – Four moderators are regarded as necessary to monitor and respond to emails from ecotourism operators in the region. These should include a general ecotourism advisor, a marketer, environmental expert and a financial advisor.

* *Estimated on the basis of TRC conducting the work.*

Phase 2. Implementation (September 2006 – ongoing)

Suggested Work Plan

Fund-raising - Preliminary efforts will be made to attract corporate sponsors to be friends of the green hub and suppliers of ecotechnologies in the region to advertise their products on the website. Secondary fund-raising efforts will focus on attracting donors for the identified project activities.

Research – the administrator will spend 1 day a week on statistical research on ecotourism, building the database of information based on the on-line survey.

Success Stories - the administrator will spend 1/2 day a week on the investigation and writing up of regional ecotourism success stories.

Green theme - the administrator will spend 1 day a week on the investigation and writing up of the green theme for the week.

Networking - the administrator will spend 1/2 day a week on networking and developing partnerships with ecotourism organizations overseas.

Friends of the Green-hub – the administrator will spend 1 day a week on marketing sponsorship opportunities and following up with possible donors.

Travellers Green-hub – The administrator will spend 1/2 days a week updating and adding to the travellers green-hub.

General administration – this is estimated to involve 1/2 day of the administrator's time every week. It will involve review of other SPTO projects for compatibility with sustainability goals, promotion of the ecotourism Code, reporting to the SPTO board and other such tasks.

CONCLUSION

The sustainable development of ecotourism in the South Pacific is in everyone's best interests. Tourist demand for ecotourism products is likely to increase in the future as will threats to the region's human and physical biodiversity. Addressing these two elements requires an integrated and sustainable approach to the development of ecotourism opportunities. This is not something that ecotourism operators can achieve alone, but requires national and regional partnerships. SPTO has the opportunity to support and nurture these partnerships, leading the way in terms of guidelines and support for ecotourism operations without creating an additional financial burden on companies.

SPTO's Green-hub provides a convenient, low-cost vehicle with which to address a number of issues and spearhead improvements to ecotourism in the region. It can provide the framework for a quality approach to the sustainable development of ecotourism in the region. The Green-hub is designed specifically to meet the stated needs of South Pacific tourism stakeholders, and can be flexible to change with them over time. In addition, the Green-hub can add value to existing SPTO membership and help to improve the profile and goodwill of the organization in the region.

In the face of global environment change, SPTO needs to change too. The need is clear, ecotourism networks worldwide demonstrate their capacity to improve ecotourism standards and the Green-hub, as an operational entity, has the potential to be financially viable based on the assumptions given. It is recommended that SPTO go ahead and establish the Green-hub, providing a mechanism to enable them to effectively *"Meet the needs of ecotourism operators in the South Pacific"*.

APPENDIX

PEOPLE CONSULTED

Fiji Public Sector

Napolioni Masirewa	Fiji Ministry of Tourism
Katrina Beatty	Fiji Ministry of Tourism
Kostino Mueudunaivalu	Fiji Ministry of Tourism
Lailun Khan	Fiji Trade and Investment Bureau
Fane Vave	Fiji Visitors Bureau

Fiji Private Sector

Tom Davis	Rainforest Lodge
Manjula Ismail	Southern Cross Hotel
David Travers	Holiday Inn
Suzie Yee Shaw	Colonial Lodge
Paul Hughes	Outrigger on the Lagoon
Philip Rusden	The Pearl
Errol Fifer	Nadi Bay Resort Hotel
Jim Sherlock	Lagoon Resort
Shilendra Dutt	Crows Nest
Mostafa Khattab	Casablanca Hotel
Ms Ranjeeta	Nakalevu Cultural Museum
Dan Costello	Beachcomber
Craig Powell	Fiji Mocambo
Andrew Brown	The Beach House
Dick Smith	Musket Cove
Rusi Brown	Aventures in Paradise
Kasi Taukeinikoro	Rivers Fiji
Rob Sloop	Arts Village, Pacific Harbour

Fiji Non-Profit Sector

Viliame Koyamaibole	Fiji Ecotourism Association
Mereani Korovavala	Fiji Hotel Association
Paulo Vanualailai	WWF
William Aalbersberg	University of the South Pacific
Dawn Gibson	University of the South Pacific
David Harrison	University of the South Pacific
David Short	University of the South Pacific
Bhaskar Rao	SOPAC
A.M. Zakaria	ILO
Humphrey Chang	Chamber of Commerce

Cook Island Public Sector

Chris Wong Cook Islands Tourism Corporation
Trine Pureau Cook Islands Tourism Corporation

Cook Island Private Sector

Greg Stanaway Pacific Resort
Malcom Central Motel
Emile Kairua Island Hopper
Jane Wichman Raro Tours
Tu Bates Backpackers International
William Stanaway Tepaki Group
Moana Hunter Vavas beach House

Cook Island Non-Profit Sector

Ian Karika Takitumu Conservation Area
Imogen Ingram Koutu Nui Taporoporoanga Ipukarea
Dorice Reid Te Tika Mataiapu

French Polynesia Public Sector

Torea Colas Tahiti Tourism
Dany Panero Tahiti Tourism
Clarisse Godefroy Service of Tourism
Yasmina Quesnot Service of Tourism
Philippe Siu Ministry of Tourism

French Polynesia Private Sector

Vincent Guerin Vagnac Sheraton
Jean-Marc Mocellin Intercontinental
Bernard Begliomini Top Dive
Marion Riviere Tahiti Nui Travel
Francois Hemery Pearl Resorts

French Polynesia Non-Profit Sector

Heifara Tetuaiva-Pollock GEI Haere Mai Small Hotels Association

Tonga Public Sector

Bruno Toke Tonga Visitors Bureau, Vavau
Sione Finau Moala-Mafi Tonga Visitors Bureau, Nukalofa
Taniela Fusimalohi Tonga Visitors Bureau, Nukalofa

Tonga Private Sector

Sandra Gross Adventure Backpackers
Dieter Dyck Tongan Resort
Sharon Spence Adventure Centre
Ken Aitchison The Moorings
Bonnie Zhang International Dateline Hotel
Sybil Kuilboer Beluga Diving

Tonga Non-Profit Sector

Geoff Hausia Tonga Ecotourism Association
Papiloa Bloomfield Foliaki Tonga Visitors Ass. President
Kololiana Naufahu Tonga Visitors Ass. Vice-president
Alan Bowe Vavau Tourism Association
Semisi Sika Tonga Visitors Association Secretary

Samoa Public Sector

Sealimalietoa Melepone Isara Samoa Tourism Authority
Matafeo Reupena Samoa Tourism Authority

Sala Pio Tagiilma
Christina Leala
Tepa Suaesi
Nomineta Saili

Samoa Private Sector

Folisaito Joe Annandale
Zita Sefo Martel
Beverley Barlow
George Hadley
Mats Loefqvist
Lydia Sini To'omalatai
Sili and Faafetai
Tapulolou Siuli Tuaillemafua
Keith and Lani Martin

Samoa Non-profit Sector

Papalii Steve Young
Nynette Sass
Leota Lu
Sue Miller Taii
Emily Waterman
Anush Avramenko

**SPTO Representatives
Interviewed**

Andrew Nemaia
Va'inga Palu
David Hunt
Peter Walsh
Linda Kalpoi
Peter Vincent
Robert Skews
Lisiate Akolo
Ross Hopkins
Helen Po'uliva'ati
Shoma Prasad

Consultants & Experts

Michael Pusinelli
Alison Allcock
David McEwen
Martha Honey
Martine Bakker
Ronald Sanabria

Samoa Tourism Authority
Samoa Tourism Authority
Ministry of Natural Resources
Ministry of Natural Resources

Sinalei Reef Resort
Island Hopper Vacations
Aggie Greys Hotel
Princess Tui Inn
Seipepa Travel Home
Letia's Beach Fales
Taufua Beach Fales
Green Turtle Tours
Savaii Surfaries

Samoa Hotel Association
Samoa Hotel Association
Samoa Tourism Industry Association
Conservation International
UNESCO
UNDP

Solomons Dept. Culture & Tourism
Tonga Visitors Bureau
Pacific Travel Marketing Ltd, Tonga
Air New Zealand
Vanuatu Tourism Office
PNG Tourism
Island Hopper Vacations, Cook Islands
SPTO
SPTO
SPTO
SPTO

Pusinelli & Associates, New Zealand
Consultant, Australia
David McEwen Consultancy
International Ecotourism Soc.
New York Univeristy
Rainforest Alliance, Washington D.C.

NTO QUESTIONNAIRE

NATIONAL TOURISM ORGANISATIONS' QUESTIONNAIRE ON THE STATUS OF:

ACCOMMODATION CLASSIFICATION, ECOTOURISM ORGANISATION AND CODES OF PRACTICE

To be completed by responsible officials of SPTO National Tourism Organizations, Tourism Associations or SPTO Board Members.

Country:

Organization:

Respondent (name, position):

Address (postal, fax, e-mail):

Have you attached additional documents?

NO

YES (please list these):

Before completing the questionnaire it is highly recommended to carefully read the notes which follow on page 2.

Please return the completed questionnaire to:

Helen Po'uliva'ati hpouливааti@spto.org

South Pacific Tourism Organization

P O Box 13119

Suva, Fiji Islands.

Fax: +679 330 1995

Notes

Purpose: To establish current situation and practice in the region with regards to accommodation classification, ecotourism organisation and the use of codes of practice.

Object:

- 1) To develop some general guidelines for a rating system which will enable improved harmonisation of accommodation nomenclature across the region.
- 2) To scope the feasibility of developing a regional ecotourism association
- 3) To use existing best practice to draw up a regional code of practice for tourism.

Definitions: For the purpose of this survey the following terms are defined:

Accommodation establishments refers to all types of accommodation (resort, hotel, motel, fale) regardless of location (beach, urban, highland) or market segment (holiday, business, domestic)

Accommodation classification system refers to a system in which accommodation establishments have been broken down into categories, classes or grades according to their common physical and/or service characteristics. This may be for the purpose of standards, accreditation or other reason.

Ecotourism Association refers to any organisations or groups of operators that define themselves as such.

Ecotourism operators refers to specialist operators that call themselves as such.

Code of practice refers to a voluntary list of recommendations provided to tourism operators normally including social, environmental and cultural and ethical aspects of tourism business.

Responses: Please indicate your answers with a tick in the appropriate box or inserting comments in the space provided. Respondents are asked to provide information on both Government and private sector initiatives if both systems exist.

Documents: **In countries where accommodation classification/ standards/ accreditation systems already exist, respondents are requested to attach additional information on these.** This may be submitted in hard or electronic form to the contact noted on page 1.

Acknowledgement: This questionnaire is based on that used by the joint WTO and IH&RA Study on Hotel Classification. 2004.

SURVEY QUESTIONS

This section is about the idea of having a Regional Ecotourism Association

1. Are any of the following associations in place in your country? *Tick as many as apply.*
- | | |
|-------------------------------|-----|
| Tourism Industry Association | [] |
| Hotel Association | [] |
| Ecotourism Association | [] |
| Other (specify) [|] |

If you have an **Ecotourism Association**, what are its main roles? *Tick those that apply.*

- | | |
|-------------------------|-----|
| Training and standards | [] |
| Marketing | [] |
| Environmental education | [] |
| Other (specify) [|] |

2. Do you support the development of a regional **Ecotourism Association** in principle?
- Yes [] No []

Please explain:

()

3. What products or services would like to see a regional **Ecotourism Association** providing? *You may tick more than one.*

- | | |
|--|-----|
| Developing ecotourism standards and professionalism | [] |
| Collaborative marketing of ecotourism | [] |
| Promoting environmental best practice and low impact tourism | [] |
| Environmental education and awareness in the community | [] |
| Monitoring the impacts of tourism | [] |
| Other (specify) [|] |

4. Who do you think should fund a regional **Ecotourism Association**? *Tick only one.*

- | | |
|------------------------------|-----|
| SPTO members | [] |
| Ecotourism operators | [] |
| National Tourism Authorities | [] |
| Other (specify) [|] |

The next section is about a Code of Practice for tourism

5. Do you have a tourism **Code of Practice** in your country?
- Yes [] No []

If yes, who is responsible for this code?

- | | |
|----------------------------|-----|
| Ecotourism operators | [] |
| Hotel Association | [] |
| National Tourism Authority | [] |
| Other (specify) [|] |

6. Do you see a role for a regional tourism **code of practice**?
- Yes [] No []

7. What would you see such a code including?

()

The last section is about Accommodation Classification

8. Are any of the following **systems** currently being used in your country?

- Accommodation classification system []
- Accommodation standards system []
- Accommodation accreditation system []
- Other system (specify) []

If no, please skip to question 17

9. What categories are used for this system (e.g. hotel/resort/budget/standard/deluxe).

()

10. What classes/grades are used within these categories? (e.g. 1-5 stars/ 1-3 crowns)

()

11. Which of the following best describes the type of approach to classification used?

- Classification based on price []
- Objective assessment of presence or absence of particular facilities []
- Qualitative assessment of service standards []
- Mixed approach []
- Other (specify)[]

12. Please name the responsible authority for this system.

()

13. What year did this system come into effect? []

14. Is the classification mandatory for all accommodation establishments?

Yes [] No []

15. Who verifies the classification/standard?

- Government inspectors []
- Hotel industry association inspectors []
- Independent assessors []
- Other (specify) []

16. Who pays for the inspection of classification/standards/accreditation?
Accommodation establishments []
Authority noted in Q.14. []
Other (specify)[]
17. Are you satisfied with accommodation standards in your country?
Yes [] No []
18. Do you have any plans to introduce a new classification system?
Yes [] No []
19. Do you support the development of regional **accommodation classification system**?
Yes [] No []
20. Which of the following best describes the accommodation classification system you would prefer to see in place on a regional basis?
Objective assessment of facilities using standard criteria []
Qualitative assessment of hospitality quality standards []
Mixed approach assessing both facilities and standards []
Other (specify) *Go over the page if necessary* []
21. Who do you think should assess accommodation for classification purposes?
SPTO inspectors []
National Tourism Authority Officials []
Hotel industry association inspectors []
Independent assessors []
Other (specify) []
22. Do you think establishments should pay for classification?
Yes [] No []
23. Do you think classification should be mandatory for all accommodation providers?
Yes [] No []
24. What benefits do you think should be available for classified establishments?
(you may tick more than one)
SPTO website marketing []
SPTO quality logo []
Appear in brochure []
Other (specify) []
25. Are there any other comments you would like to make? *(Continue over page if necessary)*

PRIVATE SECTOR QUESTIONNAIRE

PRIVATE SECTOR QUESTIONNAIRE ON THE STATUS OF:

ACCOMMODATION CLASSIFICATION, **ECOTOURISM ORGANISATION AND** **CODES OF PRACTICE**

To be completed by all interested South Pacific hoteliers and ecotourism operators

Date:

Country:

Business/Organization:

Respondent (name, position):

Address (postal, fax, e-mail):

Before completing the questionnaire it is highly recommended to carefully read the notes which follow on page 2.

Please return the completed questionnaire to:
Helen Po'uliva'ati hpouливаати@spto.org
South Pacific Tourism Organization
P O Box 13119
Suva, Fiji Islands.
Fax: +679 330 1995

Thank you very much for your participation.

Notes

- Purpose:** To establish current situation and practice in the region with regards to accommodation classification, ecotourism organisation and the use of codes of practice.
- Object:**
- 1) To look at lessons learned across the region in order to develop a framework and set of guidelines which will enable improved harmonisation of accommodation classification across the region.
 - 2) To scope the feasibility of developing a regional ecotourism association
 - 3) To investigate existing best practice to draw up a regional code of practice for tourism.
- Definitions:**
- For the purpose of this survey the following terms are defined:
- Accommodation establishments** refers to all types of accommodation (resort, hotel, motel, fale) regardless of location (beach, urban, highland) or market segment (holiday, business, domestic)
- Accommodation classification system** refers to a system in which accommodation establishments have been broken down into categories, classes or grades and rated according to their common physical and/or service characteristics. This may be for the purpose of standards, accreditation or other reason. **Accommodation accreditation** is the process of providing quality assurance.
- Ecotourism Association** refers to any organisations or groups of operators that define themselves as such.
- Ecotourism operators** refers to specialist operators that call themselves as such.
- Code of practice** refers to a voluntary list of recommendations provided to tourism operators normally including social, environmental and cultural and ethical aspects of tourism business.
- Responses:** Please indicate your answers with a tick in the appropriate box or inserting comments in the space provided. Respondents are asked to provide information on both Government and private sector initiatives if both systems exist.
- Acknowledgement:** This questionnaire is based on that used by the joint WTO and IH&RA Study on Hotel Classification. 2004.

1. Are you currently a member of any of the following organisations?
- | | |
|------------------------------|----------------------|
| Tourism Industry Association | [] |
| Hotel Association | [] |
| Ecotourism Association | [] |
| Green Globe | [] |
| Other (specify) | <input type="text"/> |

If yes, what have been the main benefits of membership from your perspective?

- | | |
|---------------------|----------------------|
| Networking | [] |
| Joint Marketing | [] |
| Lobbying Government | [] |
| Other (specify) | <input type="text"/> |

2. Would you support the development of Sustainable or Ecotourism Tourism Electronic Resource Centre?

Yes [] No []

3. What is the most valuable role such a centre can play? *You may tick more than one.*

- | | |
|--|-----|
| Providing guidelines for ecotourism operators | [] |
| Certification of ecotourism providers | [] |
| Environmental education and awareness in the community | [] |
| Advocacy role for tourism | [] |
| Joint marketing & networking | [] |

4. Who do you think should fund a regional Ecotourism Association? *Tick only one.*

- | | |
|------------------------------|-----|
| SPTO members | [] |
| Ecotourism operators | [] |
| National Tourism Authorities | [] |
| Other (specify) [|] |

5. Do you use any kind of tourism Code of Practice in your business?

Yes [] No []

If yes, please attach this to the questionnaire. *Providing us with your guidelines may enable you to be highlighted as a "best practice" operator.*

6. Do you see a role for a regional tourism code of practice?

Yes [] No []

7. What would you see such a code including?

- | | |
|--------------------------|-----|
| Environmental guidelines | [] |
| Business ethics | [] |
| Consumer rights | [] |
| Social responsibility | [] |
| Cultural behaviour code | [] |

8. Has your hotel or business ever been inspected for the purposes of licensing classification/ rating, standards or accreditation systems?

- | | |
|--|----------------------|
| Basic building check | [] |
| Accommodation accreditation/certification system | [] |
| Accommodation rating system | [] |
| Other system (specify) | <input type="text"/> |

9. How is your hotel/business currently classified?

- Resort []
Hotel []
Guest house/ Backpackers/budget []
Traditional accommodation/homestay []
Other

10. What are the shortfalls of the existing rating/classification/ licensing system?

- Too expensive []
Inspectors not trained enough []
Not regular enough []
Criteria used are unsuitable []
Ratings are arbitrary []
Other

11. Indicate the type of rating/accreditation or certification scheme that you would prefer to see adopted in your country

International [] South Pacific [] National []

12. Who do you think should assess businesses for classification purposes?

- National Tourism Office inspectors []
Hotel industry association inspectors []
Independent assessors []
Self-assessment []
Other (specify)

13. How much would you be prepared to pay for classification/accreditation per year?

14. Do you think classification/certification/rating should be mandatory?

Yes [] No []

15. Please use this space to note down what you see as the key issues your country faces in trying to upgrade accommodation.

16. Are there any other comments you would like to make about any of the areas addressed in this survey (ecotourism association, code of practice, accommodation standards systems)? *Please continue on reverse of this sheet if necessary.*

END NOTES & REFERENCES

- ¹ Honey, M. (2002) (Ed.) *Ecotourism & Certification: Setting Standards in Practice*, Island Press, Washington D.C.
- ² Epler-Wood, M. Wight, P., and Corvetto, J. (2004) *Ecolodges: Exploring Opportunities for Sustainable Business*. IFC World Bank Group, Washington D. C.
- ³ SPTO (2003) *Regional Tourism Strategy for the South and Central Pacific*. Suva: SPTO.
- ⁴ Evansen, R. 2002. *Turtle Island: Tourism and Community Health. Box 3.6 in Signposts for Sustainable Tourism: A Guidebook for The Development and Use of Indicators for The Development of Tourism Destinations*. WTO, Madrid.
- ⁵ British Airways Tourism for Tomorrow Awards 2002. *From toothpicks to Ecotourism, Bouma National Heritage Park Taveuni*, Fiji Islands.
- ⁶ Harrison, D. (ed.) (2003) Ecotourism in Fiji. In: *Pacific Island Tourism*, Cognizant Communication Corporation, 139-156, New York.
- ⁷ SPTO, 2005 Bureau Welcomes State Move (Fiji)_SPTO WEEKLY NEWSLETTER UPDATE ISSUE 03 - 21st January 2005, from (*Source: Fiji Times 20/01/2005*)
- ⁸ Harrison, D. (ed.) (2003) Themes in Pacific Island Tourism In: *Pacific Island Tourism* Cognizant Communication Corporation, 1-23, New York.
- ⁹ As above
- ¹⁰ Lew, A. A. (1998). The Asia-Pacific ecotourism industry: Putting sustainable tourism into practice. In C. M. Hall & A. A. Lew (Eds.), *Sustainable tourism: A geographical perspective*, 92-106, Longman, Essex.
- ¹¹ Lindberg, K., Furze, B., Staff, M., Black, R. (1997) *Ecotourism in the Asia-Pacific Region: Issues and Outlook*. The International Ecotourism Society, Burlington, VT.
- ¹² Nash, J. (2002) *Eco-tourism: Encouraging Conservation or Adding to Exploitation?* Population Reference Bureau
www.prb.org/Template.cfm?Section=PRB&template=/ContentManagement/ContentDisplay.cfm&ContentID=5948#1
- ¹⁵ Brikker, K. S. and Kerstetter D. L. (2002) Ecotourists and Ecotourism: Benefit Segmentation and Experience Evaluation, Draft book chapter provided via personal communication with author.

OTHER USEFUL REFERENCES

ESCAP (2003) *Ecotourism Development in the Pacific Islands*. ESCAP Tourism Review, No. 23, United Nations, New York.

SPREP (2003) *Community-based Ecotourism & Conservation in the Pacific Islands: A Toolkit for Communities*, South Pacific Biodiversity Conservation Programme, SPREP, Apia.

SPTO (2003) *Regional Tourism Strategy for the South and Central Pacific*. Suva: SPTO.

World Tourism Organization (2002) *Voluntary Initiatives for Sustainable Tourism: Worldwide Inventory and Comparative Analysis of 104 Eco-labels, Awards and Self-Commitments*, Sustainable Development Section, WTO, Madrid.

World Tourism Organization (2004a) *Tourism Vision 2020*. www.world-tourism.org

WWK-UK (2000) *Tourism Certification: An analysis of Green Globe 21 and other Tourism Certification Programmes*, Synergy, WWF-UK.

Zita T. Martel (2005) *E-Tourism: The Way Forward for Tourism in Niue*. United Nations Development Programme and Island Hopper Vacations Ltd, Apia.

USEFUL WEBSITES

www.ecotourism.org.au/

www.ecotourism.org

www.ecotourism.org.au

www.esok.org

www.ecotourismcesd.org

www.amtave.org

www.cha-cast.org

www.ecotours.co.nz

www.awrta.org

www.sidsnet.org/

eco-tourism/fea.html

www.hawaiiecotourism.org

www.samoahotels.ws

www.fha.com.fj/

www.png.aqualagoon.com/png/cms/pngtia/pngtiaindex.htm

www.vanuatutourism.com/