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# Vanuatu Strategic Tourism Action Plan

*“Doing the Basics Better”*

2014-2018

MINISTRY OF TOURISM, INDUSTRY, COMMERCE &  
NI-VANUATU BUSINESS.

Vanuatu Strategic Tourism Action Plan 2014-2018

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# **VANUATU STRATEGIC TOURISM ACTION PLAN 2014 – 2018**

**December 2013**

## Prepared for the

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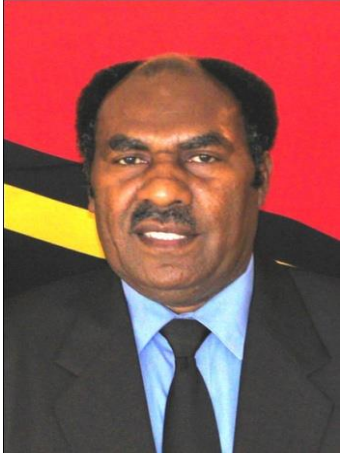
## Acronyms

ADB	Asian Development Bank
APTC	Australia Pacific Training College
AusAID	Australian Agency for International Development
AVL	Airports Vanuatu Limited
CAA	Civil Aviation Authority
DEPC	Department of Environment Protection and Conservation
DOLA	Department of Local Authorities
DOT	Department of Tourism
EU	European Union
GDP	Gross Domestic Product
HRD	Human Resource Development
HTLTC	Hospitality, Tourism & Leisure Training Centre
IFC	International Finance Corporation
INTV	Institute of Technology (Institut National de Technologie de Vanuatu)
KPI	Key Performance Indicator
LMC	Luganville Municipal Council
MALFFB	Ministry of Agriculture, Livestock, Forestry, Fisheries and Biosecurity
MCA	Millennium Challenge Account
MFAT	Ministry of Foreign Affairs & Trade (NZ)
MFEM	Ministry of Finance and Economic Management
MIA	Ministry of Internal Affairs
MIPU	Ministry of Infrastructure and Public Utilities
MOE	Ministry of Education
MTTCNVB	Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business
NABCC	National Advisory Board for Climate Change
NTDC	National Trade Development Council

NZAP	New Zealand Aid Programme
PAA	Priority and Action Agenda
PAH	Ports and Harbours
PG	Provincial Government
PSC	Project Steering Committee
PTC	Provincial Tourism Council
PVMC	Port Vila Municipal Council
PVUDP	Port Vila Urban Development Project
PWG	Project Working Group
SPTO	South Pacific Tourism Organisation
TPIU	Tourism Plan Implementation Unit
TAPSC	Tourism Action Plan Steering Committee
TDMF	Tourism Development Marketing Fund
TPF	Trade Policy Framework
TVET	Technical & Vocational Education and Training
UNWTO	United Nations World Tourism Organisation
VCCI	Vanuatu Chamber of Commerce & Industry
VHRA	Vanuatu Hotel & Resorts Association
VIBTA	Vanuatu Island Bungalows and Tourism Association
VIPA	Vanuatu Investment Promotion Authority
VKS	Vanuatu Kaljoral Senta
VNSO	Vanuatu National Statistics Office
VNTC	Vanuatu National Training Council
VPMU	Vanuatu Project Management Unit
VSA	Volunteer Service Abroad
VSTAP	Vanuatu Strategic Tourism Action Plan 2014–2018
VTAP	Vanuatu Tourism Action Program 2008–2013
VTDMP	Vanuatu Tourism Development Master Plan

VTIP	Vanuatu Tourism Infrastructure Project
VTO	Vanuatu Tourism Office
VTOA	Vanuatu Tour Operators' Association
WTTC	World Travel & Tourism Council

## Minister's Message



It gives me great pleasure to present to you the **Vanuatu Strategic Tourism Action Plan (VSTAP)**. This is a very important document for the Government of Vanuatu because it is the umbrella plan for the most important sector in the economy which is tourism. Tourism is the main driver for economic development in Vanuatu today and this Plan will guide and facilitate the further development of this sector by the Government and partners to improve the competitiveness of Vanuatu as a tourist destination and also improve the distribution of benefits to the different community groups throughout the islands in Vanuatu. This Plan replaces the Vanuatu Tourism Master Plan of 2004 and the Vanuatu Tourism Action Plan of 2008.


I would like to take this opportunity to thank everyone who were involved in the preparation of the Plan. In particular the members of the Steering Committee and Government of New Zealand for funding the preparation of the Plan and other partners within the Government of Vanuatu and private sector organisations and individuals who tirelessly worked over a period of four months to complete the Plan.

The year 2013 was a productive year for the Ministry of Tourism, Industry and Commerce because a lot was achieved during the year. In particular are the following (a) Launching of the National Cruise Tourism Action Plan; (b) Approval by the Government of New Zealand to be the focal donor for tourism; (c) Approval of funding by Government of New Zealand for the establishment of the Vanuatu Tourism Ambassador Programme and the Vanuatu Tourism Infrastructure Project; (d) The establishment of the Vanuatu Tourism Standards Committee; and (e) The launching of the establishment of Tourism Council of Vanuatu and six Local Government Tourism Councils under the Tourism Councils Act No 23 of 2012.

It is my belief that this Plan will progress the above developments further and especially through an effective partnership between all partners through the Tourism Councils Act because tourism is every body's business.

I would also like to take this opportunity to thank the Government of New Zealand for accepting to be the focal donor for tourism. This plan will also form the basis for the implementation of the Joint Commitment for Development that has been signed by the Government of Vanuatu and Government of New Zealand especially for the tourism sector.

I want to encourage every partners to work together to implement the key actions outlined in this plan and contribute proactively to developing tourism in Vanuatu because tourism is everybody's business.


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**Honourable Toara Daniel Kalo**  
**Minister for Tourism, Industry and Commerce**

**4 February, 2014**

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**Honourable Toara Daniel Kalo**  
**Minister for Tourism, Industry and Commerce**



## Executive Summary

This Vanuatu Strategic Tourism Action Plan 2014-2018 (VSTAP) provides a high level analysis of tourism in Vanuatu. The VSTAP is divided into a Situation Analysis (section 2) and an Action Plan (section 3). The Situation Analysis identifies 5 key priorities that, if adopted, will straight away positively influence Vanuatu tourism. The Action Plan identifies 6 key areas and their objectives and goals to enable future tourism development. There are 44 actions to be implemented during the lifetime of this plan (5 years) to help achieve these objectives. The combination of the Situation Analysis and Action Plan provides the strategic direction for tourism in Vanuatu 2014-2018.

A review of the previous Vanuatu Tourism Action Program 2008-2013 found that over half of the 64 actions were actioned; however, the lack of an implementation structure, team and funding hampered progress on many of the actions.

The current vision for tourism for Vanuatu has been strongly endorsed by the Project Steering Committee and remains the vision for this Vanuatu Strategic Tourism Action Plan 2014-2018.

The vision is:

*'Tourism celebrates Vanuatu's culture and environment, empowers its people and captivates its visitors throughout its islands'*

Vanuatu Tourism Action Program 2008-2013

Vanuatu's tourism is guided by various frameworks and policies.

The country's development priorities are driven by a national vision – "A just, educated, healthy and wealthy Vanuatu".

The Vanuatu Government's Trade Policy Framework (2012) clearly outlines the importance of tourism for Vanuatu and the importance of creating stronger economic linkages to the local economy, for example agriculture.

The Vanuatu tourism industry has experienced positive growth over the last five years and prospects look good for the future. Annual air visitor arrivals are at record levels – 108,000 (2012) – and the tourism industry has rapidly become the leading sector in the economy accounting for around 20% of Gross Domestic Product.

The cruise tourism market is also an important source of visitors and income for the country. Cruise ship passenger arrivals have also grown substantially; growth is estimated at approximately 15% per annum between 2006 and 2012. Cruise passenger arrivals have increased significantly above this level in 2012, by approximately 37%, to more than 213,000 passenger arrivals.

Vanuatu's tourism is based strongly on markets seeking culture, nature, adventure, relaxation and for some, cuisine. The products are very strong in land and marine based activities, including live volcanoes, world-class diving and the Pentecost land-diving (Nagol).

If tourism visitation continues at a moderate growth scenario, arrivals may exceed 500,000 arrivals a year by 2018. This could have potential impacts on: tourism governance, marketing, infrastructure and transportation, investment, product development and standards, and very significantly, human resource development.

During the study, the team has, with the support and direction of stakeholders, identified 5 key priorities that can positively influence Vanuatu tourism in the immediate future.

### **1. Deliver tourism benefits to the outer islands**

For almost a decade there have been efforts to grow tourism in the outer islands. Despite these efforts, tourism growth has not been achieved to the extent intended. These initiatives have been clearly articulated in many planning documents since the 2004-2010 Vanuatu Tourism Development Master Plan.

The infrastructure development in Vanuatu over the last five years is assisting tourism development beyond Port Vila. Examples include airport developments at Luganville (Santo) and Whitegrass (Tanna), significant road developments on Efate and Santo, improved telecommunications in the outer islands and the expansion of tourism products and services to some outer islands, eg the Malampa Call Centre.

### **2. Focus all key marketing efforts on core markets**

Tourism marketing is a highly competitive, crowded space. Continuation of the VTO's marketing strategy is clearly needed. This is outlined in their Business Plan 2013-2015. The plan focuses on the core markets of Australia, New Caledonia and New Zealand. Whilst emerging markets are identified and there is a need to understand these, there is considerable support for growing market share from the core markets, including the buoyant cruise sector, before investing into emerging markets.

There is a lack of current, robust market data and intelligence. This data is urgently needed to better inform decision-making and support the urgent need for increased Government grants.

### **3. Invest in planning and building infrastructure that will benefit tourism**

Whilst there has been increased infrastructure development which has benefitted Vanuatu tourism in recent years, there is a real need to continue to focus on infrastructure and transport improvements.

The poor state of the Port Vila and Luganville wharves, the lack of implementation of town beautification programmes in Port Vila and Luganville, the need for improved

airports and associated infrastructure and services can have an effect on investor confidence. This can be acutely seen in the cruise sector where inadequate port services, supporting infrastructure and cruise visitor management are negatively impacting on the tourism sector, in particular Port Vila.

Focused small-scale infrastructure and service improvements are needed in several growing tourism areas. Examples include upgrades at Luganville (Santo) and Lenakel (Tanna).

#### **4. Address the expectations of the tourism markets**

The absence of tourism standards can affect the overall visitor experience. This in turn could impact negatively on Vanuatu's brand.

The development of Vanuatu's tourism accreditation committee is a start on this long process of industry standard setting and tourism training. The strong and emerging adventure tourism sector will benefit from agreed and enforceable minimum standards. Whilst industry standards are needed across the sector, it is the public transport sector that has the potential to be improved rapidly and effectively improve the visitor experience.

#### **5. Work effectively and with clarity on who does what for Vanuatu tourism**

There is a need for a committed, well-resourced team to assist in implementing the next 5-year Vanuatu Strategic Tourism Plan 2014–2018.

Despite the existence of the Vanuatu Tourism Development Master Plan 2004-2010 and Vanuatu Tourism Action Program 2008-2013, implementation has been constrained by the lack of a formalised implementation process, a lack of whole of Government support for tourism and limited capacity within the Government and industry to mobilise the plans' initiatives.

Elsewhere in the Pacific, for example Samoa and Fiji, where there has been government support for plan and strategy implementation, there has been considerable tourism growth.

Until there is broader sector accountability, adequate resourcing through competent staff and finances and mechanisms for inter-agency and private sector consultations, tourism growth will be slow, ad hoc and unsustainable.

A focused, well-resourced implementation team is required to coordinate, collaborate and assist with completing the 44 actions in this plan.



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## 1 Introduction

### Background

This Vanuatu Strategic Tourism Action Plan 2014-2018 (VSTAP) has been developed by and for the tourism stakeholders of Vanuatu. The aim has been to increase investment, benefit more Vi-Vanuatu and to spread tourism benefits throughout the country<sup>1</sup>.

### Vanuatu Strategic Tourism Action Plan 2014-2018

The Situational Analysis and Vanuatu Tourism Strategic Direction included in this VSTAP incorporate the vision, principles, objectives for Vanuatu tourism and an action plan. It is the result of research, fieldwork, meetings and extensive consultations with a wide range of interested stakeholders.

The study commenced in May 2013 and concluded in October 2013 with the delivery of this final Vanuatu Strategic Tourism Action Plan 2014-2018 to the Council of Ministers. The study was directed by the Project Steering Committee (PSC) and supported by a Project Working Group (PWG).

During August and September 2013, the study team, with the Project Steering Committee, worked with industry stakeholders to develop and finalise the priority actions. A Vanuatu Strategic Tourism Action Plan Forum was held in Port Vila in September for interested stakeholders. This was an open forum that refined the actions detailed in this report following forum discussions.

The study approach has involved extensive consultation with a wide range of stakeholders and field visits to Santo, Tanna, Pentecost and Efate. An extensive range of reports were reviewed and key findings extracted. The development of the VSTAP principles and objectives by the PSC and PWG has guided the 44 actions of the VSTAP.

### The Vanuatu Tourism Action Program 2008–2013

The past Vanuatu Tourism Action Program (VTAP) has been a core Vanuatu tourism planning and implementation document for the last five years. A review of the VTAP by the project working group found that over half of the 64 actions were actioned to some degree (see Appendix 1). There have been several significant developments over the period of the plan, including:

- completion of the Efate ring-road

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<sup>1</sup> The New Zealand Aid Programme (NZAP), as part of the New Zealand Ministry of Foreign Affairs and Trade, has provided technical support to develop with the Government of Vanuatu a Strategic Tourism Action Plan 2014–2018 (VSTAP).

- completion of the Santo East Coast road
- planning for Port Vila port and city revitalization
- growth of the cruise industry
- significant improvements to telecommunications
- revitalization and refurbishment of several major Port Vila resorts, and the establishment of several boutique tourism hotels-resorts
- continuation of focused tourism marketing
- development of provincial tourism plans.

Through an ad hoc approach some progress has been made in completing actions, however the previous action plan lacked a dedicated implementation structure and team and project funding to make considerable progress on many of the actions. It also lacked a coordinating committee to oversee and monitor the implementation of the various actions.

### **Vision for Tourism**

The current vision for tourism for Vanuatu has been strongly endorsed by this study's Project Steering Committee and remains the vision for the 2014-2018 VSTAP.

The vision is:

*'Tourism celebrates Vanuatu's culture and environment, empowers its people and captivates its visitors throughout the islands'*

Vanuatu Tourism Action Program 2008-2013



## 2 Vanuatu Tourism Situation Analysis

### Introduction

With 83 islands spread over 1700 kilometers in the Pacific, Vanuatu is an important Pacific tourism destination. With a population, in 2009, of 223,023<sup>2</sup> residents, dispersed throughout the Republic, the country's geography, and the challenges of transportation are among the major barriers to development.

The country has achieved economic growth averaging 5.7% a year from 2003 - 2009<sup>3</sup>. This slipped in 2010 to 3% most likely due to the effects of the global financial crisis. Tourism contributes to 20% of Vanuatu's Gross Domestic Product (GDP)<sup>4</sup>.

The Vanuatu economy is primarily agriculture-based. Coconut oil, copra, kava and beef account for more than 75% of Vanuatu's agricultural exports, which made up to 20% of GDP in 2011<sup>5</sup>.

Poverty is an issue for Vanuatu. Poverty is serious in the two main urban centres, Port Vila and Luganville, and in some outer islands. The geographical dispersal of the smaller islands means that rural inhabitants have limited employment opportunities.

The political structure of Vanuatu is fragmented and fluid. The many political parties and independents that contest and win elections lead to considerable negotiations between parties and individuals. This leads to considerable change, uncertainty and instability in Government. This could create uncertainty for development partners and investors and be a barrier to sustainable tourism development.

Land tenure is virtually all (98%)<sup>6</sup> in communal/customary tenure. In Vanuatu there is opportunity for individuals, including foreigners, to lease land for 75 years with rights to renewal. There continues to be a lack of regulation and management of leases of customary land and this can lead to investor insecurity. The land tenure system can lead to alienation of land from Ni-Vanuatu and limit their development opportunities including tourism. For example the tenure system can be a constraint for Ni-Vanuatu receiving bank loans for developing their land (eg. tourism development). Land tenure is a long term issue that also affects other sectors of Vanuatu and requires a cross-sectoral solution. There are various Government of Vanuatu projects addressing land governance and related issues.

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<sup>2</sup> Vanuatu National Statistics Office

<sup>3</sup> Scheyvens, R & Russell, M (2013), *Sharing the Riches of Tourism in Vanuatu*, Massey University, p.5-6

<sup>4</sup> Ibid

<sup>5</sup> Ibid

<sup>6</sup> Ibid

With the historic focus on tourism visitors to Port Vila, the tyranny of distance, cost and constraints of transport and poor infrastructure limit the potential for tourism development by Ni-Vanuatu in some islands.

### **Policy Framework**

Various frameworks guide Vanuatu's tourism and these are outlined below. The country's development priorities are driven by a national vision:

*'Just, educated, healthy and wealthy Vanuatu'<sup>7</sup>. By 2015, Vanuatu will have achieved a significant increase in real per capita income, along with steady growth in levels of employment. Within the region, Vanuatu will be among the leading countries in achieving the Millennium Development Goals in education, health, environmental management, and other key social indicators. Public sector reforms will have raised standards of governance, levels of productivity in the civil service, and will have resulted in higher standards of services and managerial accountability. Through continuing structural reform, Vanuatu will have established an effective enabling environment to sustain the significant private sector growth, which it aims to achieve in output and employment'.*

Priorities and Action Agenda for Vanuatu 2006-2015 (PAA).

The PAA aims to significantly increase per capita income and employment growth through private sector growth, together with substantial achievements in relation to the UN Millennium Development Goals.

The PAA identifies the need 'for concerted efforts to be made to address the constraints to faster growth' in regard to the tourism sector. Strategic examples include: increased marketing and air connectivity, increased tourism products and accreditation, and increased training programmes.

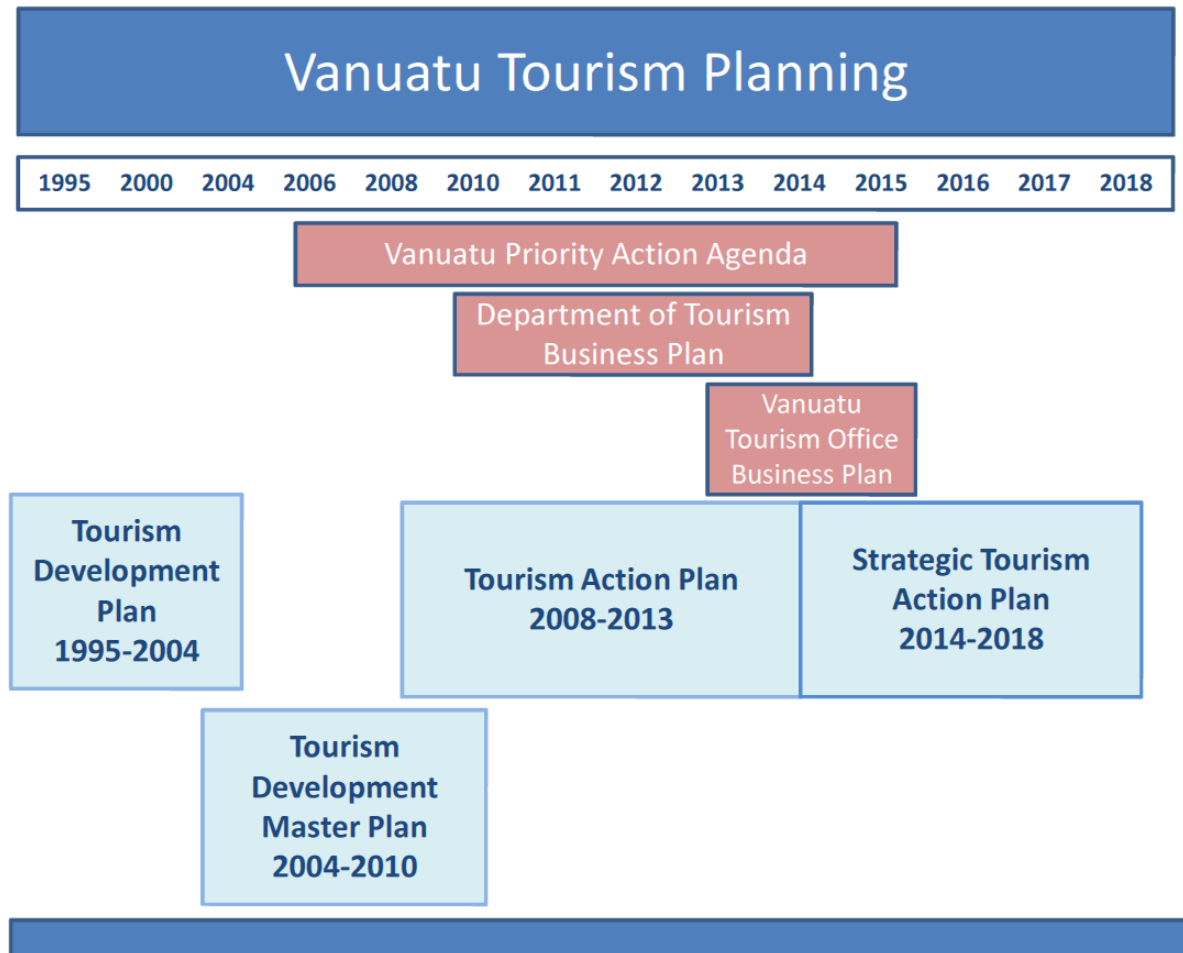
The tourism vision and the priority action agenda priorities guided the content and overall direction of the VTAP 2008-2013.

Tourism planning in Vanuatu has been influenced since 1995, by three specific tourism plans detailed below (Table 1).

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<sup>7</sup> Government of the Republic of Vanuatu Priority Action Agenda

**Table 1 – Vanuatu Tourism Planning**



In 2008 the VTAP was prepared. The development of the VTAP reflected the views of the PAA and the Vanuatu Tourism Development Master Plan (VTMP) 2004-2010 and many other relevant planning documents and reports. The core reports are listed in Appendix 2.

The Vanuatu Government’s Trade Policy Framework (TPF) (2012), the umbrella policy of the Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business, clearly outlines the importance of tourism for Vanuatu and the importance of creating stronger economic linkages to the local economy, for example agriculture. According to the Vanuatu Government’s Trade Policy Framework 2012, the performance of national agencies and services linked to tourism will be crucially dependent on the ability to design and implement an overarching and integrated tourism policy.

Tourism sector specific recommendations highlighted in the TPF include:

- › Boosting training for tourism activities reserved for Ni-Vanuatu (eg. taxi drivers, bungalow operators)
- › Drafting a zoning policy
- › Drafting a traditional knowledge, cultural expressions and biodiversity policy
- › Drafting a cruise ship policy
- › Negotiating the opening of new air connections with promising countries of origin, notably in Asia
- › Creating a comprehensive tourism data set
- › Improving value adding for urban tourism, notably through initiatives of waterfront regeneration, broad-based environment education, and improved linkages to the primary and agro-industry sectors.

The TPF's recommendations are fully aligned with the objectives and actions included in the VSTAP.

The Tourism Council Act (2013) provides for some regulation across the industry. This includes cross-sectoral national and provincial councils and regulation for tourism businesses that includes compulsory tourism accreditation.

### **Development Issues**

There is a lack of accurate data on the impacts of tourism, both good and bad, on women and youth in Vanuatu. There is however, considerable involvement of women in Vanuatu tourism, particularly in handicrafts and hospitality, including bungalow management and in hotels and restaurants. In the handicraft sector, women are primarily employed on the Mamas stalls for the cruise markets in Port Vila and the outer Island ports of call. The Vanuatu women's microfinancing organisation, Vanwoods, is active in supporting and promoting business involvement of women in tourism. There is the potential through targeted support programmes to assist with greater involvement of women and youth in Vanuatu tourism.

Adverse environmental impacts of development in Vanuatu have occurred in some locations. This also applies to tourism developments, particularly resorts and hotel developments in sensitive coastal areas on Efate. Lack of monitoring capacity and enforcing environmental standards is an issue.

Climate change issues are a focus of the Government of Vanuatu and there are several climate change projects supported by development partners. These programmes target adaption and disaster risk reduction and are coordinated by the National Advisory Board

on Climate Change and Disaster Risk Reduction which is within the Vanuatu Meteorology and Geohazards Department. There are two major World Bank funded climate change projects currently being implemented in Vanuatu.

The impact of tourism on culture/kustom for Ni Vanuatu society has been the focus of some academic research, including Joseph Cheer of Monash University in Australia, whose research papers will soon be published. There are many tourism products that have a strong cultural element including the popular 'Kustom Dance' events and string bands.

### **Development Partners Support**

During the last twenty years, international donors have made significant contributions to the Vanuatu tourism sector. This has been directly for tourism projects, eg training and marketing, or indirectly to Vanuatu's infrastructure and services, eg roads, airports, ports.

The majority of this support has been on a bilateral basis, although there have been some regional initiatives. For example the South Pacific Tourism Organisation (SPTO) is delivering the Pacific Region Tourism Capacity Building Programme under European Union (EU) funding.

Over the next 5 years, there are several major infrastructural projects committed (over 60 billion vatu), funded by donors and the Government of Vanuatu, which will benefit tourism. These projects include wharves, roads and airport upgrades. Whilst most of the projects will benefit tourism indirectly, some of them will be directly focused on tourism development, including the planned Vanuatu Tourism Infrastructure Project (VTIP) for Port Vila funded by the NZAP and the current construction of the Vanuatu Convention Centre with the assistance of China Aid.

Other ongoing specific tourism support to Vanuatu includes training initiatives such as APTC and TVET funded through AusAID.

In 2013, New Zealand was offered, and accepted, the role of the donor focal point for tourism development in Vanuatu.

### **Economic Impacts**

There is a lack of current and accurate data available to undertake an in-depth analysis of the economic impact of the tourism sector. This study has used broad estimates of expenditure by visitors based on revisions to the data collected under the Millennium Challenge Account (MCA) Tourism Survey 2010<sup>8</sup> to reflect the increase in arrivals for both air and cruise visitor markets.

There is a considerable range in estimates for Vanuatu's tourism contribution to GDP from various sources. The 2010 MCA Tourism Survey used a figure of 20%, established from raw

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<sup>8</sup> MCA Tourism Survey 2010 – TRIP Consultants

data. The recent World Travel & Tourism Council Economic Impact Report for Vanuatu uses a 17.6% contribution of direct tourism to GDP for 2012<sup>9</sup>. These estimates appear to be realistic as they are based on raw data from the Government of Vanuatu Ministry of Finance and Economic Management.

**Table 2: Estimates of tourist arrivals, average length of stay, average daily expenditure and estimated total expenditure 2012<sup>10</sup>**

Segment	Tourists 2012	Average Length of Stay (days)	Average Daily Expenditure (Vatu)	Estimated Total Direct Expenditure (Vatu Billion)
International Air Arrivals	108,161	8.0	13,456	11.6
Cruise Ship Passengers	213,242	1.0	21,446	4.5

These broad estimates indicate that the direct contribution of international tourist expenditure from both markets has increased to approximately 15 billion Vatu in 2013 from the equivalent 2010 MCA estimate of 13.5 billion vatu<sup>11</sup>.

### Sustainable Tourism

Expressed simply, sustainable tourism is:

*'Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'<sup>12</sup>*

United Nations World Tourism Organisation

Awareness about sustainability issues has increased significantly since the original report of the World Commission on Environment and Development (1987). The pillars of sustainability are often framed around sound economic development, management of environmental resources and engaged socio-cultural mandates.

<sup>9</sup> World Travel and Tourism Council (2013). *Travel & Tourism Economic Impact 2013 Vanuatu*. WTTC London

<sup>10</sup> Due to data limitations, no adjustments have been made to the 2010 average length of stay or average daily expenditure estimates (MCA Tourism Survey 2010). Estimates are based on expenditure and stay in Port Vila (no data available for passenger spend on outer island visits).

<sup>11</sup> World Travel and Tourism Council (2013). *Travel & Tourism Economic Impact 2013 Vanuatu*

<sup>12</sup> <http://sdt.unwto.org/en/content/about-us-5>

Tourism is in a very special position to benefit local communities, and government can play a significant role in sustainable tourism development through policies to strengthen benefits and reduce the tourism impact costs to society and the environment.

Currently the sustainability ethos in Vanuatu is not apparent beyond agencies that have a particular interest. There is no emphasis on managing growth of the tourism market, the safety of consumers and the environment that tourism depends on or on addressing poverty alleviation through tourism development.

Partnerships to develop policy and guidelines that enable government and the tourism industry to incorporate sustainability principles into their decision making process and day-to-day operations including monitoring impacts are a good way to start.

### **Tourism Markets and Products**

Vanuatu has, by comparison with its regional neighbours, good tourism arrivals with 108,000 air arrivals and 213,000 cruise arrivals<sup>13</sup>. Vanuatu's tourism arrivals have grown substantially in the last 5 years, as detailed in section 3.

Despite the dominance of the short haul markets, Vanuatu still has a relatively small market share of the outbound market for Australia, New Zealand and New Caledonia, indicating that there is still scope for additional market growth from these countries. However, repeat visitation levels are relatively high, at approximately 29% of the market.

Vanuatu's tourism activities are strongly centred on culture, nature, adventure and relaxation.

### **Tourism Institutions and Stakeholders**

There is a wide range of stakeholders involved in the sector. The main stakeholders are:

- Department of Tourism, responsible for policy and planning regarding tourism development and developing the country as an attractive destination for tourists
- Vanuatu Tourism Office (VTO), charged with the marketing of tourism
- Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business (MTTCNVB), which directs the DOT, and exercises authority over statutory bodies with a key role on tourism including the VTO and VIPA
- Air Vanuatu; the main airline carrier for Vanuatu
- Airports Vanuatu Limited, owner of the three international airports

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<sup>13</sup> Vanuatu National Statistics Office 2012

- › Vanuatu Hotels & Resorts Association (VHRA), which uses membership fees to fund marketing activities. VHRA also provides a private sector voice in discussions with Government and others on tourism development
- › Vanuatu Tour Operators Association (VTOA) which coordinates the marketing of members' tours, and has a Code of Conduct which members abide by – this covers safety as well as respect for culture and environment
- › Vanuatu Island Bungalows & Tourism Association (VIBTA) which has a focus on promoting tourism beyond Efate and developing Ni-Vanuatu tourism services on offer in the outer islands

In addition to these public sector stakeholders, the following agencies all have a role in tourism in Vanuatu:

- › Departments under the Ministry of Agriculture, Livestock, Forestry Fisheries and Bio-Security (MALFFB); Lands (MLNR); (MFA); Customs and Inland Revenue (MFEM); Health (MoH); Ports & Harbours; Public Works (MIPU); Offices of the Vanuatu Police (MIA); National Statistics Office (MFEM), Municipal and Provincial Councils (MIA); and the Vanuatu National Council of Women (MJSW); The Vanuatu Cultural Centre (MIA); The Vanuatu Investment Promotion Authority (VIPA), which has a mission to 'facilitate, promote and foster foreign investment in Vanuatu and to generate greater economic prosperity for the people of Vanuatu'; Vanuatu Kaljoral Senta (VKS); The Vanuatu Broadcasting & Television Corporation (VBTC); The South Seas Shipping Company; Chamber of Commerce; Tourism Associations.

The two main Government tourism agencies are the Department of Tourism (DOT) and the Vanuatu Tourism Office (VTO). The Department of Tourism is considerably under-resourced for its departmental responsibilities. The VTO is a semi-independent government-owned marketing body.

The private sector tourism associations vary in strength and capability. The VHRA, with a strong membership base, is committed by legislation to assisting the VTO's marketing efforts through a hotel and resort bed levy.

There are opportunities to strengthen the organisational capabilities of the core agencies (DOT & VTO) and the various associations directly engaged in Vanuatu's tourism. Examples include strengthening the Provincial Tourism Associations and increasing the capabilities and planning needs for industry associations.

### **The Five Key Priorities for Vanuatu Tourism**

During the study, the team has, with the support and direction of stakeholders, identified 5 key priorities that can positively influence Vanuatu tourism.



These are the need to:

**(1) Deliver tourism benefits to the outer islands**

For almost a decade there have been efforts to grow tourism in the outer islands. These initiatives have been clearly articulated in many planning documents since the 2004-2010 Vanuatu Tourism Development Master Plan and the Vanuatu Tourism Action Program 2008-2013. Success of these initiatives has been limited by a lack of suitable air connectivity and infrastructure in the outer islands.

The infrastructure development in Vanuatu over the last five years is assisting tourism development beyond Port Vila. Examples include airport developments at Luganville (Santo) and Whitegrass (Tanna), significant road developments on Efate and Santo, improved telecommunications in the outer islands and the expansion of tourism products and services to some outer islands, eg the Malampa Call Centre.

**(2) Focus all key marketing efforts on core markets**

Tourism marketing is a highly competitive, crowded space and there is a clear need to continue the Vanuatu Tourism Office's marketing strategy. This is outlined in their Business Plan 2013-2015. The plan focuses on the core markets of Australia, New Caledonia and New Zealand. Whilst emerging markets are identified and there is a need to understand these, there is considerable support for growing market share from the core markets, including the buoyant cruise sector, before investing into emerging markets.

There is a lack of robust market data and intelligence, which is urgently needed to better inform decisions and support the urgent need for increased Government grants.

**(3) Invest in planning and building infrastructure that will benefit tourism**

Whilst there has been increased infrastructure development that benefits Vanuatu tourism in recent years, there is a real need to continue this focus on infrastructure and transport improvements.

The poor state of the Port Vila and Luganville wharves, the lack of implementation of town beautification programmes in Port Vila and Luganville, the need for improved airports and associated infrastructure and services can have an effect on investor confidence. This can be acutely seen in the cruise sector where inadequate port services, supporting infrastructure and cruise visitor management are negatively impacting on the tourism sector, in particular Port Vila.

Focused small-scale infrastructure and service improvements are needed in several growing tourism areas. Examples include upgrades at Luganville (Santo) and Lenakel (Tanna).

**(4) Address the expectations of the tourism markets**

The absence of tourism standards can affect the overall visitor experience. This in turn could impact on Vanuatu's brand.

The development of Vanuatu's tourism accreditation committee is a start on this long process of industry standard setting and tourism training. The strong and emerging adventure tourism sector will benefit from agreed and enforceable minimum standards. Whilst industry standards are needed across the sector, it is the public transport sector that has the potential to be improved rapidly and effectively improve the visitor experience.

**(5) Work effectively and with clarity on who does what for Vanuatu tourism**

There is a need for a committed, well resourced team to assist in implementing the next 5-year Vanuatu Strategic Tourism Action Plan 2014–2018.

Whilst there was the Vanuatu Tourism Development Master Plan 2004-2010 and the VTAP 2008-2013, implementation was constrained by the lack of a formalised implementation process, a lack of whole of Government support for tourism and limited capacity within the Government and industry to mobilize the plans' initiatives.

Elsewhere in the Pacific, for example Samoa and Fiji, when Governments have supported plan and strategy implementation, there has been considerable sustainable tourism growth.

Until there is broader sector accountability, adequate resourcing through competent staff and finances and mechanisms for inter-agency and private sector consultations, tourism growth will be slow, ad hoc and unsustainable.

A focused, well-resourced implementation team will be required to coordinate, collaborate and assist with completing the 44 actions in this plan.

The following analysis addresses the major components of Vanuatu's tourism sector and includes markets, activities and accommodation, infrastructure and transport, investment and human resource development.

**Markets and Marketing**

**2.1.1 Vanuatu tourism arrivals by air**

Visitor arrivals are at record levels (2012) and the tourism industry has rapidly become a leading sector in the economy.

Tourism arrivals by air have grown at around 8% per annum since 2006. Whilst annual fluctuations have been evident, 2012 had a strong positive trend, achieving 15% growth, equating to almost 14,000 arrivals and a total estimated record arrivals figure of approximately 108,000. These growth levels are substantially higher than the global and regional average of around 4%.

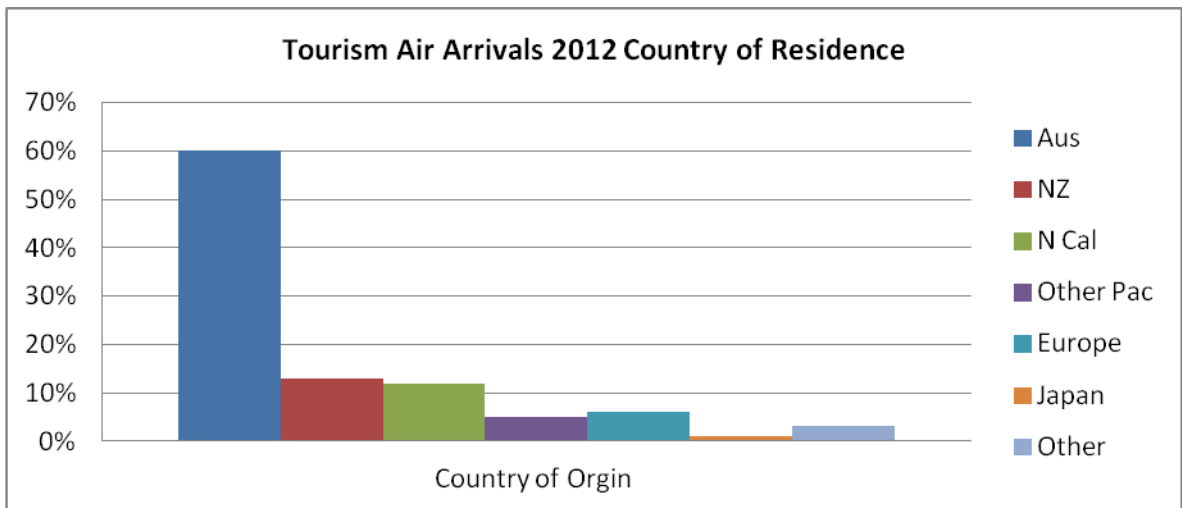
The vast majority of visitors are on holiday (82%), although a few are on business or conferences (10%) and visiting friends and relatives (7%).

**Figure 1: Vanuatu tourism arrivals 2006-2012**



The tourism market to Vanuatu is highly concentrated into three short haul markets, which together make up almost 86% of arrivals; Australia is by far the largest market (60%), followed by New Zealand (13%) and New Caledonia (12%)<sup>14</sup>.

**Figure 2: Vanuatu Tourism Air Arrivals 2012 by country of residence**

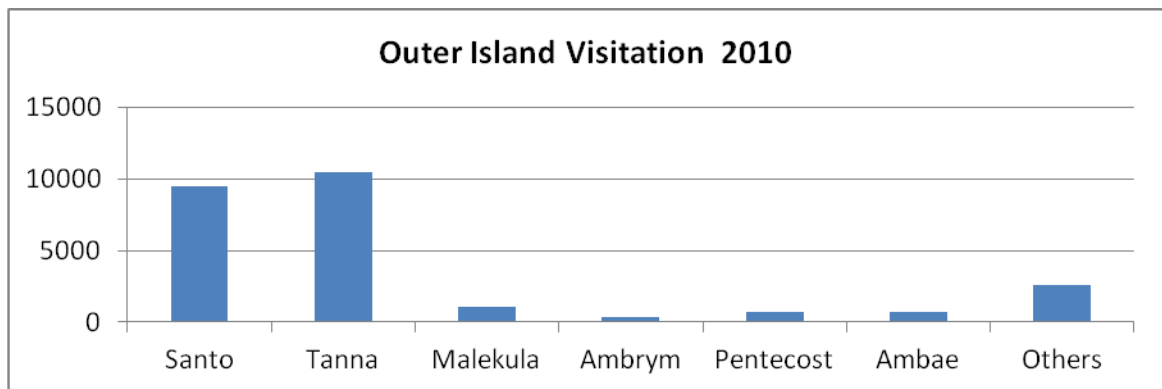


The average length of stay reflects the short haul nature of the tourism market to Vanuatu at just over eight nights.

<sup>14</sup> Vanuatu National Statistics Office

In 2010 approximately 21% of visitors<sup>15</sup> to Port Vila also travelled to the outer islands; this equates to an estimated 2012 number of approximately 22,700 visitors. Tanna has the highest level of visitation outside of Port Vila, followed by Santo, although Santo has a much longer length of stay and therefore more visitor nights.

**Figure 3: Outer Island Visitation 2010**



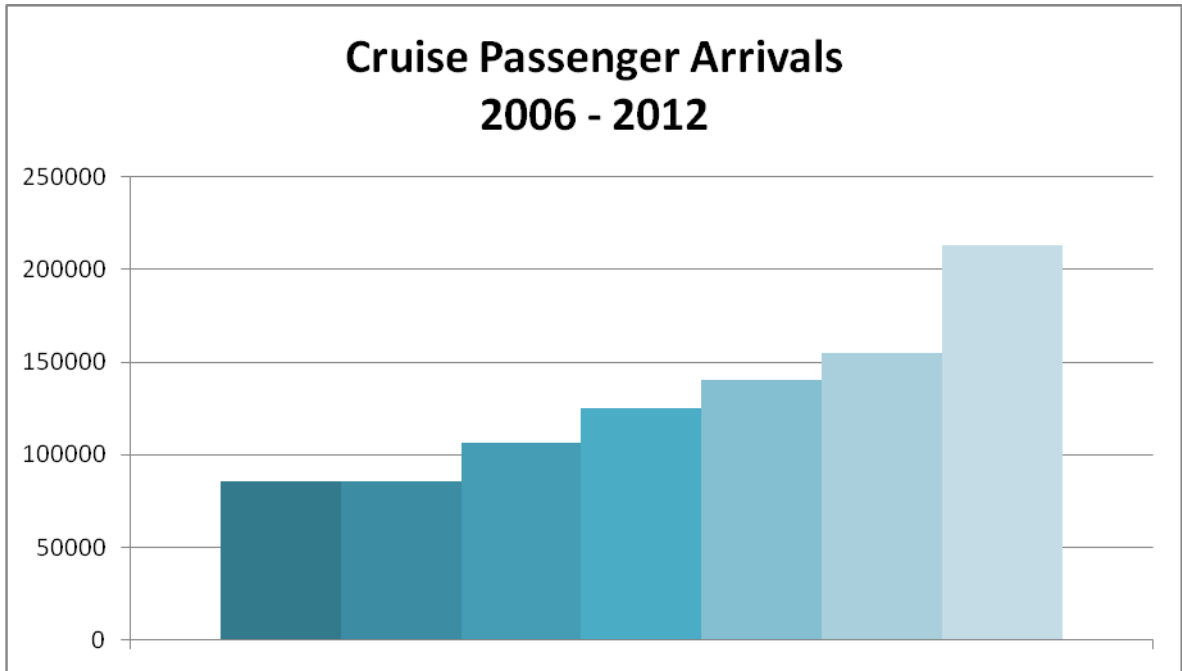
### 2.1.2 Cruise tourism

The cruise tourism market is also an important source of income for the country. Cruise ship passenger arrivals have grown substantially - estimated at approximately 15% per annum between 2006 and 2012. Cruise passengers arrivals have increased substantially above this level in 2012, by approximately 37% since 2011, to more than 213,000 passenger arrivals. Australians are the main current market (over 90%)<sup>16</sup>.

<sup>15</sup> MCA - Vanuatu Tourism Survey - 2011

<sup>16</sup> Vanuatu Hotels and Resorts Association

Figure 4: Cruise Passenger Arrivals 2006-2012



Cruise tourism arrivals to Vanuatu have been consistently strong for the last 5 years and Vanuatu has been one of the stellar performers in the Pacific<sup>17</sup>.

### 2.1.3 Marketing

Whilst Vanuatu has a strong brand and a marketing presence in core markets, there is the constant need for sufficient funds and capabilities to market Vanuatu. There are considerable shifts occurring in tourism marketing, with more online marketing than print, and these need to be reflected in destination marketing for Vanuatu. The current budget of the VTO is 139 million vatu for 2013, of which 62% is allocated to marketing. The Tourism Marketing Development Fund contributes between 35 and 40 million Vatu per annum to the VTO marketing programme. This VTO budget is low compared to other Pacific destinations. For example, Fiji spends over 1.6 billion vatu equivalent, with the Cook Islands, Tonga and Samoa each spending more than 200 million vatu equivalent per annum.

#### **Activities and Accommodation**

Vanuatu's tourism is based strongly on markets seeking culture, nature, adventure, relaxation, and for some, cuisine.

<sup>17</sup> South Pacific Tourism Organisation Annual Statistics 2011

Vanuatu is building a reputation in the Pacific for having a very good range of desirable adventure, nature and cultural attractions. Vanuatu is arguably the Pacific capital (outside of Australasia) of adventure tourism. This reputation also has its risks if the sector is perceived to be poorly managed. The initiatives by the Government of Vanuatu for addressing minimum standards and accreditation for the various sectors (eg. taxis, buses, adventure activities and accommodation) should be beneficial to the markets, and Vanuatu.

#### **2.1.4 Activities**

The products of Vanuatu are very strong in land and marine-based iconic activities, including the Pentecost land-diving (Nagol), volcanic adventure walks focused on Mt Yasur on Tanna Island, and diving, particularly on the SS President Coolidge at Santo.

There are over 200<sup>18</sup> operators providing land-based activities across Vanuatu. These are the main activity-based attractions comprising of strong cultural products of primarily feasts, village tours and some traditional handicrafts. From these core products Vanuatu is now broadening the activities and range of products to include zip lines, abseiling, blokarts, mountain bike trips and guided tours.

On sea, there is the well-established sports-fishing sector and a growing yachting sector. The water sports tourism attractions include: kayaking, paddle-boarding, kite-surfing, ocean swim events, Efate and Port Vila cruises and island day tours, snorkeling, and ocean floor walking. There are in excess of 50<sup>19</sup> marine-based tourism operators in Vanuatu, the majority being Efate-based.

Whilst the majority of these activities and attractions are Efate and Port Vila focused, Luganville on Santo has the well-known adventurous Millennium Cave Tour, as well as a comprehensive range of land and water based activities.

The unregulated development of some of the activities (eg guided walks and adventure activities) increases the risk of injury to participants and the reputational risk of the sector.

#### **2.1.5 Accommodation**

Port Vila is the accommodation gateway to Vanuatu and has an excellent spread and types of accommodation. These range from the larger scale (100+ rooms) family focused resorts to the boutique resorts. A number of the established resorts have been renovated and expanded in the last five years. There are now over 70<sup>20</sup> accommodation providers in Port

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<sup>18</sup> Sources include Provincial Tourism Plans, Industry Association input and promotional material

<sup>19</sup> Ibid

<sup>20</sup> Ibid

Vila. In addition, there are over 100 holiday homes, residential homes and apartments for rent.

In Port Vila, accommodation providers receive excellent room rates in a regional context and generally have consistent occupancy of over 60%. Outside of Port Vila, there is an abundance of bungalows that often suffer from inconsistent visitor flows. The small business scale of the bungalows limits their marketing abilities. The recent MALAMPA Call Centre (a collaborative centralised marketing/reservations initiative) has been successful in growing visitor numbers to MALAMPA province.

Outside of Port Vila, on Efate, is a range of new accommodation providers from the top end such as The Havannah and Eratap Resorts – through to village bungalows. Locally owned bungalows (over 200) are widespread on many of the islands.

### **Infrastructure and Transport**

With over 100,000 visitors arriving by air and over 210,000 cruise visitors in 2012, infrastructure that supports tourism is essential. In general there are significant infrastructure limitations, especially with ports, roads and bridges.

#### **2.1.6 Airports**

There are 29 airfields throughout Vanuatu, with 2 fully operating as international gateways; Bauerfield on Efate and Pekoa on Santo. Whitegrass on Tanna has approval for international flights but international arrivals are rare due to lack of market demand and commercial realities.

The current airstrips at Bauerfield, Pekoa and Lenakel need upgrading, including widening, lengthening and re-sealing the Bauerfield runway, upgrading airport facilities, including navigational aids, and regular maintenance at Pekoa and Lenakel.

The other 26 airfields vary in standards and maintenance, and over time tourism will benefit from these relevant airfields being upgraded, in particular Norsup, on Malakula.

A new international airport has been proposed for Efate. This is designed to carry large 747s and other long range, wide-body aircraft. The proposed development is by a Singaporean company that has signed an agreement with the Government of Vanuatu. The budget for the project exceeds A\$365 million. This airport will not be operational for several years.

Currently in the peak season there are scheduled international flights to Bauerfield direct from Melbourne (twice a week), Sydney (six times a week), Brisbane (four times a week), Noumea (four times a week), Nadi and Suva (twice a week) and Auckland (four times a week). Santo receives one flight from Brisbane and Nadi each week. Tanna only receives chartered international flights, usually from New Caledonia.

### **2.1.7 Wharves**

Island connectivity by marine transport is a real challenge with considerable ocean waters, limited port facilities and limited tourism transport available. Local island and short-haul inter-island travel for visitors is often by the ubiquitous ‘banana’ boat. There is an inter-island passenger vessel, Big Sista, that offers travel between Efate and Santo islands.

The two main cruise ship ports are in Port Vila and Luganville. Both ports are inadequate for the current and future needs of the rapidly expanding cruise sector. Future demands by the cruise sector also include the likelihood of larger vessels (250-300 metres in length). The landing facilities in the other islands that are visited by cruise ships or tourism boats are generally inadequate by today’s standards.

There are comprehensive port upgrade plans for Port Vila and Luganville that are ready to be implemented.

There is also the Inter-Island Shipping Project that will develop up to 8 wharves locations across Vanuatu.

### **2.1.8 Roads**

The road infrastructure of Vanuatu can be very challenging for all – residents and visitors. The recently upgraded Efate ring-road and the Santo east coast road have been very beneficial to tourism on those islands, by opening up potential tourism areas. This is particularly so on Efate and the direct effect of a good road can be seen on round-island tours.

The main roads of Port Vila and Luganville need significant upgrading. In Port Vila, virtually all main roads, including roads to key tourism accommodation areas require considerable upgrades and ongoing maintenance. The Port Vila Urban Infrastructure Project funded by Asia Development Bank and AusAID will address roads and transport management issues in the central part of Port Vila through the Vanuatu Traffic Management Plan. This project is planned to start by mid 2014. There are current urban roading plans for Luganville, but these are subject to funding.

### **2.1.9 Public Utilities**

Whilst public utilities, including water, power, telecommunications, and health services are all improving, there is a real need for continued improvement in some specific tourism locations. Electricity continues to be a major cost for operators, especially accommodation providers.

### **2.1.10 Infrastructure Summary**

Transportation and its supporting infrastructure are crucial to the future of a sustainable tourism sector. There is a real need for significant infrastructure projects that will benefit



many businesses and the public as well as visitors. The Government of Vanuatu, with support from development partners, is about to proceed with such projects.

Upgrading the airstrips and airports at Bauerfield and Pekoa is important. The Port Vila Wharf and the Luganville Wharf both need significant improvements. The hydrographic mapping of the key cruise waters of Vanuatu is important and must be completed by late 2015 if the cruise line companies are to have appropriate vessel insurance cover.

Vanuatu's tourism infrastructure, compared to its competing destinations of New Caledonia, Fiji, Cook Islands, and Samoa, has infrastructure constraints which limit Vanuatu's market appeal.

### **Investment**

Tourism investment in Vanuatu is guided by the Vanuatu Investment Promotion Authority (VIPA). VIPA was established in 2005 to formulate a transparent and open investment environment as well as rapid processing of foreign investment applications. A focus is on fostering foreign investment into Vanuatu.

The Government's National Investment Policy current objectives for the tourism sector are:

- › To promote the industry as a means of conserving Vanuatu's unique cultural patterns, archaeological and historical sites, and the natural environment
- › To develop tourism so that it attracts the range and quality of tourists who appreciate the culture and the environment of the country and are willing and able to move beyond Port Vila
- › To expand and ensure an effective government organisation with adequate resources for tourism planning, development and marketing, essential for the continued development of the industry in Vanuatu
- › To allow sufficient flexibility of foreign investment where large amounts of capital are needed or when specialised operations or skills are necessary in order to offer variety in tourism attractions that currently do not exist. Examples might include theme parks, dolphin parks, dolphin therapy (for health), sea world, etc.

In effect, businesses pay no income tax or capital gains tax. They pay VAT, business licence fees, and duty for imported goods.

The Foreign Investment Promotion Act recognises the intent to encourage Ni-Vanuatu investment in tourism. The Act specifically restricts certain types of businesses to Ni-Vanuatu. These are called "Reserved Investments" and include:

- › Local tour agents if the annual turnover is less than VUV 20 million
- › Local tour operators if the investment is less than VUV 50 million

- Commercial cultural feasts (Melanesian, Polynesian, etc.)
- Guest houses if the number of beds is less than 50 or fewer than 10 rooms or the annual turnover is less than VUV 20 million
- Bungalows if the annual turnover is less than VUV 30 million
- Hotels and motels if the total value of the investment is less than VUV 10 million.

Vanuatu's tourism is dominated by foreign investment. These investments are in the accommodation, air transport and activities area. There continues to be ongoing investment by foreigners in new resorts, holiday accommodation and re-investment in current resorts. In the last five years, there has been an estimated 50 billion vatu re-invested in resorts such as Le Lagon and the Holiday Inn<sup>21</sup>.

The Ni-Vanuatu investors are virtually all in smaller, less capital-intensive businesses, such as taxis, buses, bungalows, tours and cultural shows. Accessing capital and developing viable business plans are often significant constraints for establishing or expanding Ni-Vanuatu businesses.

Whilst there are favourable investment conditions, especially for international investors, land tenure can be a significant constraint for foreign tourism developers. In essence, the majority, over 98% of Vanuatu land, is held in customary or communally title. Often customary title is disputed, both before and after signing leases. Customary owners can lease land for up to 75 years, with renewal rights. The constraint for Ni-Vanuatu investors is to be able to borrow capital off their customary land. This is very difficult and a significant barrier for local investment. There are constraints for small businesses, in particular for Ni-Vanuatu, on accessing finance, as well as business advice and market intelligence.

### **Human Resource Development**

There is a strong workforce servicing the Vanuatu tourism sector. Estimates vary from 4000<sup>22</sup> FTEs to over 10,000<sup>23</sup> full time equivalents working directly in the sector, however specific numbers are not known.

A conservative estimate of over 8000 full time equivalents gives an indication of the size of the sector. This is calculated on the basis of staffing needs for over 2000 beds in hotels/resorts/holiday rentals, over 200 bungalows, over 100 tour operators, custom shows and feasts, over 400 "mamas" handicraft stalls, a large number of taxis, buses, restaurants and cafés.

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<sup>21</sup>Interview with Mr Bryan Death, September 2013

<sup>22</sup> MCA Tourism Survey 2010 – TRIP Consultants

<sup>23</sup> Scheyvens, R & Russell, M (2013), Sharing the Riches of Tourism in Vanuatu, Massey University, p21

To date there has been very little tourism workforce planning. There are human skills development plans for SANMA and MALAMPA by TVET and a generic Vanuatu training needs analysis was compiled in 2007 by the EU.

The recent South Pacific Regional Tourism Hospitality Human Resources Development Plan 2013 has little information or strategies for HRD in Vanuatu.

The main tourism training providers are the Australian Pacific Training Centres, the Rural Training Centres and the TVET programmes. The Vanuatu Institute of Technology (INTV) is the major supplier of Certificate I and II qualifications. INTV is under constraints with their capacity to deliver courses. Currently there are only 96 places for the INTV 6-month hospitality course based in Port Vila. In addition the Vanuatu Chamber of Commerce and Industry runs basic management training courses and the Department of Cooperatives runs business management training.

The New Zealand Volunteer Service Abroad (VSA) scheme currently provides 5 business advisors for the Department of Tourism and the Department of Cooperatives in Port Vila, SANMA province and MALAMPA province.

Within the private sector there is a real focus on in-house training at all levels. This is particularly true in the accommodation, restaurant and activities areas.

There are proposals to strengthen the training coordination and delivery. It is proposed by the National Trade Development Council (NTDC) that the Hospitality Tourism and Leisure Training Centre (HTLTC) be separated from the Vanuatu Institute of Technology (INTV) and that a Tourism Diploma be introduced at HTLTC.

A tourism 'Ambassador programme' (New Zealand funded) has recently been launched as a one year pilot in Port Vila. This programme is aimed initially at those focused on the cruise industry. Selected taxi and bus drivers, the 'mama' stall holders, retailers and tourism activity providers will be trained in aspects of customer service over the next year. The programme is being managed by the DOT.

Training for those associated with the tourism sector has long been talked about as a key issue that needs constant planning and action. As the industry continues to grow and the needs of the sector become more demanding, eg language skills, there will be a need for a strong, vibrant workforce. Further opportunities for women to be engaged in a greater range of opportunities should be considered during workforce planning. There appear to be significant gaps in parts of the workforce, with special concern for the lack of skills in managing finances, middle management and supervisors along with a potential shortage of trained chefs. Focused capacity building in the tourism policy and planning area is also required. There have been many concerns expressed by industry stakeholders about the need for continued focused capacity building for all parts of the industry.

If tourism arrivals reach over 500,000 within 5 years, there will be a definite labour shortage in the tourism sector. These shortages will be in labour availability and technical and professional skills.

### **Future Tourism Growth**

Forecasting visitor arrivals to the Pacific, and specifically to Vanuatu, for the next five years is a challenge. There is a wide range of external factors (eg volcanic eruptions, tsunamis, health scares, political unrest) that can have a major negative impact on visitor arrivals. Over the last twenty years the Pacific has been affected by several natural, economic or political events that resulted in reduced visitor arrivals.

The history of these events is that usually tourism arrivals bounce back quickly, within a few months of the event (Fiji is a relevant case in point). Table 3 below outlines visitor arrival scenarios based on possible growth rates. A scenario for negative growth is included.

**Table 3: Visitor number scenarios for Vanuatu 2013-2018**

Scenario	Travel	2012	2013	2014	2015	2016	2017	2018
Scenario 1. Decline in growth	Air – 3% PA	108,000	104,760	101,617	98,567	95,612	92,743	89,961
	Cruise – 5% PA	213,000	202,350	192,233	182,621	173,490	164,816	156,575
	<b>Total</b>	<b>321,000</b>	<b>307,110</b>	<b>293,850</b>	<b>281,188</b>	<b>269,102</b>	<b>257,559</b>	<b>246,536</b>
Scenario 2. Moderate growth	Air +3% PA	108,000	111,240	114,577	118,014	121,554	125,201	128,957
	Cruise +10% PA	213,000	234,300	257,730	283,503	311,853	343,039	377,343
	<b>Total</b>	<b>321,000</b>	<b>345,540</b>	<b>372,307</b>	<b>401,517</b>	<b>433,407</b>	<b>468,240</b>	<b>506,300</b>
Scenario 3. Strong growth	Air +8% PA	108,000	116,640	125,971	136,049	146,933	158,687	171,382
	Cruise +15% PA	213,000	244,950	281,693	323,947	372,539	428,420	492,683
	<b>Total</b>	<b>321,000</b>	<b>361,590</b>	<b>407,664</b>	<b>459,996</b>	<b>519,472</b>	<b>587,107</b>	<b>664,065</b>
Scenario 4. Exceptional growth	Air +10% PA	108,000	118,800	130,680	143,748	158,123	173,935	191,329
	Cruise +20% PA	213,000	255,600	306,720	368,064	441,677	530,012	636,014
	<b>Total</b>	<b>321,000</b>	<b>374,400</b>	<b>437,400</b>	<b>511,812</b>	<b>599,800</b>	<b>703,947</b>	<b>827,343</b>

The scenarios range from a decrease in arrivals over the next five years from the present 331,000 visitors down to 257,559 to increases to more than 700,000 annual visitors. If we accept that there is a real possibility of moderate growth of 3% in air arrivals and 10% in cruise passengers, the above figures indicate the need to be planning for managing at least 500,000 visitors a year by 2018.

The implications of these four scenarios are significant as it is possible that total annual arrivals could exceed 650,000 by 2018 in a strong growth scenario. This will have significant localized impacts on the environment and many parts of the tourism industry, including

governance, marketing, infrastructure and transportation, investment, product development and standards, society and human resource development.

### 3 Vanuatu Strategic Tourism Action Plan 2014-2018

#### Introduction

This Vanuatu Strategic Tourism Action Plan 2014-2018 (VSTAP) is the guiding plan for Vanuatu's tourism sector for the period 2014-2018. The plan reflects the country's tourism development priorities.

Activities incorporated in the plan have been prioritised using two key criteria:

1. will the actions benefit Ni-Vanuatu tourism
2. the timing sequence of the actions in relationship to other actions in the plan

To implement this plan, considerable focus, collaboration, coordination and resources will be required. These resources will be in addition to current GOV financial allocations to the Ministry of Tourism, Trade, Commerce and Ni-Vanuatu business (namely DOT and VTO).

The plan will benefit from a focused Vanuatu Strategic Tourism Action Plan Project Implementation Unit that is professionally staffed and resourced for up to 5 years.

The engagement of donors to assist the plan's implementation will be crucial.

During recent years several donors have assisted Vanuatu Tourism. Currently Australian AID, the International Trade Centre, Pacific Islands Trade Invest and New Zealand are assisting with Vanuatu tourism projects.

The New Zealand Government has been formally appointed as the focal Tourism Donor by the Government of Vanuatu (September 2013). New Zealand has committed to:

- › Assisting with the Vanuatu Tourism Infrastructure project (improvements to Seafront and Cruise ship precincts)
- › Supporting a one year pilot of the Vanuatu Tourism Ambassadors programme
- › Funding the development of the Vanuatu Strategic Tourism Action Plan 2014-2018

The indicative budget for implementing this Vanuatu Strategic Tourism Action Plan is estimated to be over 60 billion vatu. Donor support will be essential to undertake many of the plan actions.

#### Plan Directions

The following section outlines the vision, principles, objectives and goals and actions for implementation.

These directions are the result of the situational analysis, the resulting central priorities and subsequently the key immediate actions (within 5 years).

## **Vision**

The study's project steering group and stakeholders have endorsed the following vision developed for the VTAP 2008-2013:

**'Tourism celebrates Vanuatu's culture and environment, empowers its people and captivates its visitors throughout its islands'**

## **Principles**

- (i) The private sector contributes to Vanuatu Tourism by:
  - › investing in tourism products
  - › marketing Vanuatu tourism products
  - › creating wealth and benefits
- (ii) The public sector contributes by:
  - › creating an enabling environment for sustainable development, including:
  - › clear priorities
  - › clear laws and regulations
  - › collecting and dispersing relevant tourism data
  - › supporting Ni-Vanuatu participation
  - › creating a safe and secure environment
  - › providing and maintaining supporting infrastructure
- (iii) Vanuatu Tourism is an inclusive sustainable industry (economically, socially, culturally and environmentally).

## **5 Key Objectives for Future Tourism Development**

The objectives for future tourism development are:

### **(i) Governance**

Improve governance, institutional arrangements, policy coordination and tourism sector planning.

### **(ii) Marketing**

To effectively market Vanuatu as a desired destination in key source markets.

### **(iii) Infrastructure and Transport**

To encourage development and maintenance in key tourism infrastructure and transport services.

### **(iv) Investment**



To create a positive environment for international and domestic investment in tourism.

**(v) Product Development and Standards**

To develop quality market-focused products that reflect and build on Vanuatu’s natural and cultural features.

**(vi) Human Resource Development**

To build the capacity and skills of those in the tourism sector.

**Goals and 44 Actions for the 5 Key Objectives**

**Objective 1. Governance**

Improve governance, institutional arrangements, policy coordination and tourism sector planning

**Goal**

To strengthen the role of the Vanuatu Tourism Office and the Department of Tourism

**Actions**

1.1	Establish a Steering Committee and Project Management Unit within the Ministry of Tourism to Implement the Vanuatu Strategic Tourism Action Plan 2014-2018
1.2	Review the respective roles of the Vanuatu Tourism Office and the Department of Tourism to provide clarity on responsibilities and eliminate any duplication
1.3	Strengthen the capacity of Ministry of Tourism, Corporate Services Unit to effectively coordinate policy and manage implementation of tourism projects
1.4	Develop and implement a Sustainable Tourism Development Policy that includes Environmental Management, Climate Change, Eco-Tourism Cultural Tourism and managing social impacts
1.5	Support provincial tourism associations and industry associations with capacity building in association planning
1.6	Strengthen the role of the Provincial Tourism Councils
1.7	Undertake destination management plans for the international gateways of Santo and Tanna and incorporate a review of the Provincial Tourism Plans as part of the process
1.8	Implement market research programmes, including establishment of robust datasets on international visitor arrival
1.9	Strengthen the agencies to manage compliance with the recommendations of environmental and social impact reports of tourism development, and to enforce non-compliance of recommendations

**Objective 2. Marketing (from VTO 2013-2015 Business Plan)**

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To effectively market Vanuatu as a desired destination in key source markets

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**Goal**

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To increase the value of Vanuatu tourism expenditure by air visitors by 10% to exceed 26 billion vatu by 2015

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**Actions**

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2.1	Continue to implement the VTO Business Plan 2013-2015
2.2	Develop a Vanuatu Destination Marketing Plan
2.3	Review funding options for marketing Vanuatu tourism, including benchmarking international marketing expenditure and explore private sector contributions to the TDMF.

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**Objective 3. Infrastructure and Transport**

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To encourage development and maintenance in key tourism infrastructure and transport services

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**Goal**

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To improve tourism services through planned infrastructure

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**Actions**

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3.1	Upgrade the Luganville (Santo) tourist wharf and facilities
3.2	Implement the town beautification plan for Luganville
3.3	Implement the town beautification plan for Port Vila
3.4	Complete the Tourism Infrastructure Project (Port Vila Seawall & Seafront; Cruise ship Precinct; Fatumaru Park)
3.5	Support the implementation of the recommendations of the Port Vila Road Hierarchy infrastructure project that impact on tourism
3.6	Formalise the role and management of Tourism Precincts (Port Vila) for the PVUDP and VTIP
3.7	Encourage the development of inter-island marine transport for tourists once the Lapatasi project is completed in 2016
3.8	Ensure regular audits and maintenance of marine infrastructure meet International Codes
3.9	Complete the development of relevant hydrographic maps for all forms of Vanuatu shipping by 2014, in coordination with other relevant agencies and projects
3.10	Complete an Aviation Strategy by 2015

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3.11	Monitor charter and scheduled services between the Vanuatu approved airports and key tourism markets and emerging markets
3.12	Upgrade and maintain the existing international airport infrastructure at Bauerfield (Efate), Pekoa (Santo) and Whitegrass (Tanna) airports
3.13	Upgrade and maintain domestic airports at Lonorore (Pentecost) and Maewo airport (Maewo)
3.14	Upgrade and maintain domestic airports at Norsup (Malakula), North Ambrym Airport (Ambrym) and Mota Lava (Banks)

#### **Objective 4. Investment**

To create a positive environment for international and domestic investment in tourism

##### **Goal**

To stimulate Ni-Vanuatu tourism investment by improving the investment environment

##### **Actions**

4.1	Develop and implement a Tourism Investment Strategy that improves the environment for investment
4.2	Identify opportunities for import substitution and for increasing the economic contribution from tourism, particularly in agri-tourism
4.3	Enable Ni-Vanuatu tourism investment through access to capital and tourism services
4.4	Amend the relevant Business Licence categories in the Business Licence Act to complement the requirements of the Tourism Council of Vanuatu Act

#### **Objective 5. Product Development and Standards**

To develop quality market-focused products that reflect and build on Vanuatu's natural and cultural features.

##### **Goal**

Vanuatu is a competitive tourist destination by providing a diverse range of quality tourism experiences

##### **Actions**

5.1	Develop and implement minimum standards for all tourism products
5.2	Develop a risk management and certification programme for high risk activities (i.e. scuba & land diving) including cruise ship sites

5.3	Develop and implement the Classification and the Accreditation programmes for all tourism products
5.4	Review the National Cruise Tourism Action Plan to ensure that it addresses economic, social and environmental impacts and risk management issues
5.5	Implement the key recommendation of the National Cruise Tourism Action Plan
5.6	Undertake a feasibility study for the establishment of a National Tourism Booking Centre, and implement key recommendations
5.7	Revisit the NZ Regional Handicraft Project recommendations and prioritise implementation
5.8	Develop and implement a Yachting Strategy
5.8	Develop Small Business Enterprise Hubs / Centres for tourism business development advisory services
5.10	Explore the concept of model provincial bungalows and services

#### **Objective 6.Human Resource Development**

To build the capacity and skills of those in the tourism sector

#### **Goal**

To increase vocational training opportunities to improve access to quality education and training opportunities with a pathway to higher level qualifications

#### **Actions**

6.1	Undertake and implement a Tourism Human Resource Implementation Plan that addresses training needs, current providers, vocational and educational gaps by 2014
6.2	Implement the recommendation to separate the HTLTC from INTV
6.3	Implement the Ambassadors Programme with the view to developing a long term sustainable programme of support
6.4	Support the mentoring of existing and new Tourism clients who undertake National, Provincial and Community-based training, education and awareness programmes

## 5 Key Objectives and 44 Actions: Priority Level, Key Agencies, Budget and KPIs

3.1.1 Governance				
Goal: To strengthen the role of the Vanuatu Tourism Office and the Department of Tourism				
ACTION	PRIORITY	KEY AGENCIES	BUDGET	KPI
1.1 Establish a Steering Committee and Project Management Unit within the Ministry of Tourism to implement the Vanuatu Strategic Tourism Action Plan 2014-2018	HIGH 2014	MTTCNVB	50 million vatu p.a.	TAPSC established TPIU established and operating
1.2 Review the respective roles of the Vanuatu Tourism Office and the Department of Tourism to provide clarity on responsibilities and eliminate any duplication	HIGH/MEDIUM 2014	MTTCNVB	5 million vatu p.a.	Review of roles completed
1.3 Strengthen the capacity of Ministry of Tourism, Corporate Services Unit to effectively coordinate policy and manage implementation of tourism projects	LOW 2014	MTTCNVB	Operational budget	Support services developed and implemented
1.4 Develop and implement a Sustainable Tourism Development Policy that includes Environmental Management, Climate Change, Eco-Tourism Cultural Tourism and Managing social impacts	MEDIUM 2014	MTTCNVB DEPC VKS NABCC	In TPIU budget	Policy developed and implemented
1.5 Support provincial tourism associations and industry associations with capacity building in association planning	HIGH 2014	DOT Industry	10 million vatu p.a.	Support services provided
1.6 Strengthen the role of the Provincial Tourism Councils	HIGH 2014	DOT PG	TPIU budget	Support services provided
1.7 Develop destination management plans for the international gateways of Santo and Tanna and incorporate a review of the Provincial Tourism Plans as part of the	HIGH 2015	DOT PG	40 million vatu in total	1 - Provincial Plans reviewed 2 - Destination Management Plans

process		PTC		completed
1.8 Implement market research programmes, including establishment of robust datasets on international visitor arrival	MEDIUM 2015	DOT VTO VNSO	10 million vatu p.a.	Market research programmes implemented
1.9 Strengthen the agencies to manage compliance with the recommendations of environmental and social impact reports of tourism development, and to enforce non-compliance of recommendations	MEDIUM 2015	DEPC DOT	Operational budget	Support services provided to relevant agencies

DEPC Department of Environment Protection and Conservation

DOT Department of Tourism

MTTCNVB Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business

NABCC National Advisory Board for Climate Change

PG Provincial Government

PTC Provincial Tourism Council

VKS Vanuatu Kaljoral Senta

VNSO Vanuatu National Statistics Office

VTO Vanuatu Tourism Office

### 3.1.2 Marketing

**Goal: To increase the value of Vanuatu tourism expenditure by air visitors by 10% to exceed 26 billion vatu by 2018**

<b>ACTION</b>	<b>PRIORITY</b>	<b>KEY AGENCIES</b>	<b>BUDGET</b>	<b>KPI</b>
2.1 Continue to implement the VTO Business Plan 2013-2015	MEDIUM 2014	VTO	100 million vatu p.a.	VTO Business Plan implemented
2.2 Develop a Vanuatu Destination Marketing Plan	HIGH 2014	VTO	200 million vatu over 5 years	Destination Marketing Plan completed and implemented
2.3 Review funding options for marketing Vanuatu tourism, including benchmarking international marketing expenditure, and explore private sector contributions to TMDF	MEDIUM/LOW 2015	VTO MTTCNVB	5 million vatu	Marketing funding options reviewed, industry contributions to TMDF reviewed

MTTCNVB Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business  
VTO Vanuatu Tourism Office

### 3.1.3 Infrastructure and Transport

**Goal: To improve tourism services through planned infrastructure**

ACTION	PRIORITY	KEY AGENCIES	BUDGET	KPI
3.1 Upgrade the Luganville (Santo) tourist wharf and facilities	HIGH 2015	MIPU	1.5 billion vatu	Wharf and facilities upgraded
3.2 Implement the town beautification plan for Luganville	LOW 2015	MIPU LMC DOLA	1.5 billion vatu	Luganville town beautification completed
3.3 Implement the town beautification plan for Port Vila	MEDIUM 2015	MIPU PVMC DLA MTTCNVB	0.5 billion vatu	Port Vila town beautification completed
3.4 Complete the Vanuatu Tourism Infrastructure Project (Port Vila Seawall & Seafont; Cruise ship Precinct; Fatumaru Park) by 2016	LOW 2016	MIPU VPMU	1.5 billion vatu	Vanuatu Tourism Infrastructure Project completed
3.5 Support the implementation of the recommendations of the Port Vila Road Hierarchy infrastructure project that impact on tourism	LOW 2015	MIPU PVUDP VPMU	Operational budget	Support provided to PVUDP
3.6 Formalise the role and management of Tourism Precincts (Port Vila) for the PVUDP & VTIP	HIGH 2017	PVMC DOT	Operational budget	Tourism precincts management formalized and operational
3.7 Encourage the development of inter-island marine transport for tourists once the Lapatasi project in Port Vila is completed by 2016	LOW 2016	MTTCNVB MIPU	Operational budget	Inter-island marine tourism services extended



3.8 Ensure regular audits and maintenance of marine infrastructure meet International Codes (ISPS)	LOW 2015	PAH	To be confirmed	Marine infrastructure meets requirements of international codes (ISPS)
3.9 Complete the development of relevant hydrographic maps for all forms of Vanuatu shipping by 2014, in coordination with other relevant agencies and projects	HIGH 2014	MIPU PAH DOLA	0.5 billion vatu	Hydrographic maps completed for priority areas
3.10 Complete an Aviation Strategy by 2015	LOW 2015	CAA Industry	5 million vatu	Aviation Strategy completed and implemented
3.11 Monitor charter and scheduled services between the Vanuatu approved international airports and key tourism markets and emerging markets	LOW 2016	MIPU CAA AVL Industry Airlines	Operational budget	Air service agreements monitored
3.12 Upgrade and maintain the existing international airport infrastructure at Bauerfield (Efate), Pekoa (Santo) and Whitegrass (Tanna) airports	HIGH 2014	MIPU CAA AVL	20 billion vatu	International airport infrastructure upgraded and maintained
3.13 Upgrade and maintain domestic airports at Lonorore (Pentecost) and Maewo (Maewo)	HIGH 2014	MIPU CAA AVL	10 billion vatu	Domestic airports infrastructure upgraded and maintained
3.14 Upgrade and maintain domestic airports at Lonorore (Pentecost), Norsop (Malekula), Maewo Airport, North Ambrym Airport and Mota Lava (Banks)	MEDIUM 2016	MIPU CAA AVL	25 billion vatu	Domestic airports infrastructure upgraded and maintained

AVL	Airports Vanuatu Limited
CAA	Civil Aviation Authority
DOLA	Department of Local Authorities
DOT	Department of Tourism
LMC	Luganville Municipal Council
MIPU	Ministry of Infrastructure and Public Utilities
MTTCNVB	Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business
PAH	Ports and Harbours
PVMC	Port Vila Municipal Council
PVUDP	Port Vila Urban Development Project
VPMU	Vanuatu Project Management Unit

### 3.1.4 Investment

**Goal: To stimulate Ni-Vanuatu tourism investment by improving the investment environment**

ACTION	PRIORITY	KEY AGENCIES	BUDGET	KPI
4.1 Develop and implement a Tourism Investment Strategy that improves the environment for investment	HIGH 2014	MTTCNVB VIPA	10 million vatu	Tourism Investment Strategy completed and implemented
4.2 Identify opportunities for import substitution and for increasing the economic contribution from tourism, particularly in agri-tourism	MEDIUM 2015	MTTCNVB, MALFFB	10 million vatu	Import substitution opportunities for tourism identified
4.3 Enable Ni-Vanuatu tourism investment through access to capital and tourism services	HIGH 2015	VIPA DOT VCCI Financial Institutions	10 million vatu p.a.	Access to capital and tourism services for Ni-Vanuatu improved
4.4 Amend the relevant Business Licence categories in the Business Licence Act to complement the requirements of the Tourism Council of Vanuatu Act	MEDIUM 2014	MFEM DOT	Operationa l budget	Business Licence Act Amendment gazetted

DOT Department of Tourism  
 MALFFB Ministry of Agriculture, Livestock, Forestry, Fisheries and Biosecurity  
 MFEM Ministry of Finance and Economic Management  
 MTTCNVB Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business  
 VCCI Vanuatu Chamber of Commerce & Industry  
 VIPA Vanuatu Investment Promotion Authority

### 3.1.5 Product Development

**Goal: Vanuatu is a competitive tourism destination by providing a diverse range of quality tourism experiences**

<b>ACTION</b>	<b>PRIORITY</b>	<b>KEY AGENCIES</b>	<b>BUDGET</b>	<b>KPI</b>
5.1 Develop and implement minimum standards for all tourism products	HIGH 2014	DOT Industry	10 million vatu	1. Minimum standards established and implemented 2. All tourism providers meet minimum standards
5.2 Develop a risk management and certification programme for high risk activities (eg. scuba & land diving) including Cruise Ship sites	LOW 2015	DOT Industry	5 million vatu	Risk management and certification procedures developed
5.3 Develop and implement the Classification and the Accreditation programmes for the all tourism products	HIGH 2014	DOT Industry	10 million vatu p.a.	Classification and accommodation programmes developed and implemented
5.4 Review the National Cruise Tourism Action Plan to ensure that it addresses economic, social and environmental impacts and risk management issues	MEDIUM 2014	DOT Industry	Operational budget	National Cruise Tourism Action Plan reviewed
5.5 Implement the key recommendations of the National Cruise Tourism Action Plan	HIGH 2014	DOT VTO Industry Communities	15 million vatu	National Cruise Tourism Action Plan recommendations implemented
5.6 Undertake a feasibility study for the establishment of a National Booking System, and implement key recommendations	HIGH 2014	DOT VTO	10 million vatu	National Booking System study completed and recommendations implemented
5.7 Revisit the NZ Regional Handicraft Project recommendations and prioritize implementation	MEDIUM 2015	DOT Industry	10 million vatu	Recommendations implemented
5.8 Develop and implement a Yachting Strategy	LOW	DOT	2 million	Yachting Strategy developed

	2016	Industry	vatu	and implemented
5.9 Develop Small Business Enterprise Hubs / Centres for tourism business development advisory services	MEDIUM 2015	MTTCNVB VCCI Industry	10 million vatu p.a.	Additional Small Business Enterprise Centres established and operational
5.10 Explore concept of model provincial bungalows and services	MEDIUM 2015	MTTCNVB	2 million vatu	Assessment completed

DOT Department of Tourism

MTTCNVB Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business

VCCI Vanuatu Chamber of Commerce & Industry

VTO Vanuatu Tourism Office

### 3.1.6 Human Resource Development

**Goal: To increase vocational training opportunities to improve access to quality education and training opportunities with a pathway to high level qualifications**

ACTION	PRIORITY	KEY AGENCIES	BUDGET	KPI
6.1 Develop a Tourism Human Resource Implementation Plan that addresses training needs, current providers, vocational and educational gaps by 2014 and implement the recommendations	HIGH 2014	MTTCNVB MOE	15 million vatu then 20 million vatu p.a.	Plan completed and implemented
6.2 Implement the recommendation to separate the HTLTC from INTV	LOW 2014	MTTCNVB	Operational budget	Recommendation implemented
6.3 Implement the Ambassadors Pilot Programme recommendations	HIGH 2014	DOT	25 million vatu p.a.	Ambassadors Pilot Programme recommendations implemented
6.4 Support the mentoring of existing and new tourism clients who undertake National, Provincial and community based training, education and awareness programmes	LOW 2015	DOT VNTC Training providers	10 million vatu p.a.	Tourism trainers and training providers

DOT Department of Tourism

MOE Ministry of Education

MTTCNVB Ministry of Tourism, Trade, Commerce and Ni-Vanuatu Business

VNTC Vanuatu National Training Council

## Appendix 1: Review of the Vanuatu Tourism Action Program 2008-2013

### Strategy One: Institutions and Partnerships

#### Improve Policy Coordination and Increase Capacity to Sustainably Plan and Market Tourism

Action	Priority	Responsibility	KPI	STATUS	REMARKS
1.1. Establish a multi sector Tourism Council of Vanuatu (TCV) (TTF) from key stakeholders to monitor the TMP activities and support with a Tourism Technical Working Group; composition of TCV to be based on 50/50 membership of public and private key stakeholders	High	MoT/CoM	TTF established and meetings held every quarter	Progressing	<ul style="list-style-type: none"> <li>Legislation passed to establish TCV.</li> <li>Consideration to be given to reviewing the workability of the TCV legislation.</li> <li>Not likely to progress quickly without some funding to kickstart.</li> <li>Councils yet to be established in the Provinces.</li> <li>Look to establish the Tourism Task Force (TTF).</li> </ul>
1.2. Establish a Project Management Unit within the NTDO and provide adequate resources (including Technical Assistance) for the PMU to provide Secretariat services to the TCV to coordinate activities, manage the implementation process and monitor outcomes	High	MoT/DoF/Donors	Secretariat established, technical assistance provided and annual budget provided; implementation and monitoring taking place.	Not started	
1.3. Establish a Department of Tourism within the Ministry to more fully support tourism development and replace the NTDO. Develop a structure based on clear functionality and service delivery needs.	High	MoT/PSC	Departmental and staffing structure approved and operationalised.	Completed	<ul style="list-style-type: none"> <li>Name changed to Department of Tourism.</li> <li>New structure approved by PSC.</li> </ul>
1.4. Establish Provincial Tourism Councils in all Provinces and support and build capacity within Provincial tourism networks and industry associations as mechanisms for tourism development and marketing at a local level	High	NTDO/VTO/DESD/Donors	Program developed and implemented leading to measurable Provincial network capacity building	Progressing	<ul style="list-style-type: none"> <li>DoT Provincial Tourism Officers tasked with establishing councils and holding meetings in their respective province.</li> <li>Provincial Tourism Associations established and registered with VFSC.</li> <li>DoT has requested additional Government funding (VT2.4m per province) to establish the TCV's. This has not yet been approved.</li> </ul>
1.5. Support existing tourism institutions with capacity building programs and technical assistance and including staff training, mentoring and skills development	High	DESD/Donors/VTO/NTDO	Program developed and implemented leading to agency capacity building	On going	<ul style="list-style-type: none"> <li>VSA volunteers have been assigned within the DoT since 2009 to work alongside and build the capacity of the Provincial Tourism Officers. Volunteers assigned in PENAMA; MALAMPA; SANMA &amp; SHEFA. Current volunteers posted to SANMA, SHEFA &amp; DoT.</li> <li>TVET skills training underway with Provincial Tourism Officers and Vanuatu Tourism Office staff.</li> </ul>
1.6. Based on the recommendations contained within the TAP, design and implement an integrated five year tourism development program of assistance for donor funding	High	NTDO/Donors/DESD/VTO	Design undertaken and approved for donor funding	Not started	<ul style="list-style-type: none"> <li>The current review of the VTAP 2008 could form this piece of work to harness donor support.</li> <li>Signed agreement yet to be developed with each donor agency, however NZ Govt has accepted the role to be the focal point for Tourism development projects.</li> </ul>
1.7. Develop and support the implementation of Provincial Tourism Plans for all the Provinces, which incorporate cultural and environmental sustainability	High	MoT/NTDO/PWD/DPA/Prov/VTO/Donors	Provincial Tourism Plans developed and implementation for all Provinces	On going	<ul style="list-style-type: none"> <li>Provincial Tourism Plans completed and launched.</li> <li>Plans assist in development of annual work programme for Provincial Staff.</li> <li>Many aspects of implementation require external funding.</li> <li>Consideration to replacing the plans with comprehensive 'Declinational Management Plans'.</li> </ul>
1.8. Ensure thorough Environmental and Social Impact analysis are undertaken on all major development proposals (and funded by developers) and build capacity in the Vanuatu Government to assess impacts and impacts management.	High	Env Unit/NTDO/Industry	All major proposals are subject to thorough EIA and SIA studies	On going	<ul style="list-style-type: none"> <li>EIA &amp; SIA are required to be completed. Most developments undertake the EIA process with the DEPC.</li> <li>Scope to improve the process for developers and DEPC.</li> <li>Scope to ensuring SIA's are a mandatory part of the development process.</li> </ul>

**KEY: Red** Delete from the next Action Plan

**Green** Include in the next Action Plan as a **priority**

**Blue** Include in the next Action Plan

**Strategy Two : Marketing the Destination**

**Increase the awareness of the unique selling points of Vanuatu as a tourist destination in identified priority markets**

Action	Priority	Responsibility	KPI	STATUS	REMARKS
2.1 Review the VTO Act to minimize political interference, increase industry participation and improve transparency and change the name to Tourism Vanuatu	High	MoT/VTO	Act revised and amendments approved by Parliament	Progressing	<ul style="list-style-type: none"> <li>VTO Act amended, yet to be passed and gazette.</li> <li>Consideration may be needed to again review the VTO Act.</li> </ul>
2.2 Provide government funding for VTO based on clear targets and UNWTO standards for destination marketing expenditure	High	MoT/VTO/DoF/ Industry	Clear targets and funding at UNWTO levels established.	Progressing	<ul style="list-style-type: none"> <li>Annual targets are established, but need to consider a Benchmarking exercise so that future spend etc is based on sound research.</li> <li>Marketing matrix established as annual programme of destination marketing expenditure.</li> <li>Funding from Government is inconsistent.</li> </ul>
2.3 Extend the current Tourism Market Development Fund to other beneficiary sectors (ie duty free retailers, utilities, services) and support with legislation	High	MoT/VTO/DoF/ Industry	Fund enacted under legislation	Progressing	<ul style="list-style-type: none"> <li>T MDF legislated and established. May be in need of a review to enable other sectors to participate.</li> <li>Other sectors are not currently included in legislation or contributing to the T MDF.</li> <li>Consideration to be given to developing destination benchmarking for funding.</li> </ul>
2.4 Finalise the Brand Strategy for Vanuatu (including concept testing in key markets) and incorporate the new brand and positioning into all destination marketing activities	High	VTO/Industry	Brand concept testing undertaken and brand incorporated into all activities	Progressing	<ul style="list-style-type: none"> <li>Brand Strategy complete.</li> <li>'Discover What Matters' brand launched domestically and in key international markets.</li> <li>Research carried out by external agency.</li> <li>Testing still to be undertaken.</li> </ul>
2.5 Develop (through industry input) and adequately resource and implement a VTO led destination Marketing Strategy based on sound market research, review of geographic market resource allocation based on return on investment, product analysis and industry consultation and input.	High	VTO/Industry	Marketing Strategy adopted by VTO and implemented	On going	<ul style="list-style-type: none"> <li>Currently using the Marketing Matrix as the tool for a destination marketing strategy.</li> <li>Would benefit from a dedicated Destination Marketing Plan.</li> </ul>
2.6 Develop and fund an ongoing tourism market research program to support tourism marketing and planning, including consumer and trade research, visitor surveys and economic impact studies.	Medium	VTO/Stats	Tourism research program designed and funds provided for annual implementation	On going	<ul style="list-style-type: none"> <li>Trade/Events/Research Officer within the VTO established.</li> <li>Require external funding to undertake research.</li> <li>Research and Surveys to be undertaken in the Cruise Sector in 2013.</li> </ul>
2.7 Support new domestic and international flight services with destination marketing	High	VTO/Industry	Marketing activities specifically supporting new air services	On going	<ul style="list-style-type: none"> <li>Air Vanuatu (AVL) &amp; VTO undertake joint international marketing campaigns.</li> <li>Looking to new air services in China &amp; Korea.</li> </ul>
2.8 Ensure all destination marketing activities are subject to annual review and evaluation based on cost effectiveness, through specific research which measures specified performance indicators.	High	VTO	Annual marketing review conducted of all activities	On going	<ul style="list-style-type: none"> <li>Annual review of marketing activities undertaken with international Marketing Managers at the conclusion of the annual trade show (Toktok Vanuatu).</li> </ul>
2.9 Establish formula for funding VTO activities which is based on matching funding provided by regional competitors and targeted visitor arrivals	High	VTP/DoF/MoT	Formula established and incorporated into government budgeting procedures	On going	<ul style="list-style-type: none"> <li>Marketing Matrix utilized to establish annual budget and to seek additional budget from government.</li> <li>Consider securing funding to do a benchmarking exercise.</li> </ul>
2.10 Update the VTO product database to include all Provincial products and incorporate into the VTO internet site	High	VTO/Provs/ Industry	Database up dated and products incorporated into the VTO site	On going	<ul style="list-style-type: none"> <li>Dot &amp; VTO currently collating all product information into a shared database.</li> <li>Quality provincial products that meet criteria are included on the VTO website.</li> </ul>



**Strategy Two : Marketing the Destination*****Increase the awareness of the unique selling points of Vanuatu as a tourist destination in identified priority markets***

<b>Action</b>	<b>Priority</b>	<b>Responsibility</b>	<b>KPI</b>	<b>STATUS</b>	<b>REMARKS</b>
2.11 Support the geographic spread of tourism by incorporating Provincial tourism products and icons into VTO marketing and identifying niche markets aimed at supporting market development for outer island products	High	VTO/Industry	Provincial icons and activities incorporated into all VTO promotions	On going	<ul style="list-style-type: none"><li>• VTO has established an 'Outer Island' marketing budget that supports activities such as printing materials; attending international trade shows; attending Toktok Vanuatu.</li></ul>
2.12 Develop comprehensive information on yachting in Vanuatu which focuses on the outer islands and incorporate information into the VTO internet site	Medium	VTO	VTO site has dedicated section included for yachting	Progressing	<ul style="list-style-type: none"><li>• Currently have VSA volunteers undertaking collation of this work, expect to be completed by end of 2013.</li></ul>

### Strategy Three: Investment and Product Development

Support greater local and international participation in the sector by improving the business enabling environment, investment attractiveness and product range of Vanuatu

Action	Priority	Responsibility	KPI	STATUS	REMARKS
3.1 Conduct a feasibility study on mechanisms to secure key tourism development sites and establish zoning approvals/regulations as well as explore potential to link investor approvals to land use planning/zoning controls	Medium	DESD/DoL/NTDO/Donors/VIPA	Feasibility developed and recommendations adopted	Progressing	<ul style="list-style-type: none"> <li>Tourism Zones identified across the Provinces of SHEFA; SANMA &amp; TAFEA, and Port Vila.</li> <li>Currently in DRAFT waiting release by Dept of Local Authorities.</li> <li>Include into Destinal Management Plans.</li> <li>VIPA working on profiling some sites following work undertaken by IFC (on specific Hotel/Resort sites).</li> <li>Still requires a feasibility study for broader tourism products.</li> </ul>
3.2 Undertake a scoping study to establish a program which supports the networking of rural tourism SME's	High	NTDO/VCCI/DESD/Donors/Industry	Scoping study developed and recommendations adopted	Progressing	<ul style="list-style-type: none"> <li>Tourism Assns established in every Province.</li> <li>Networking undertaken at meetings and on ad-hoc basis.</li> <li>TVET programme in MALAMPA &amp; SANMA provides opportunities for networking.</li> <li>Consider including into Destinal Management Plans</li> </ul>
3.3 Undertake a Product Development and Competitiveness Study to identify key investment opportunities and market requirements	High	NTDO/DESD/Donors	Study completed and recommendations adopted	Not complete	<ul style="list-style-type: none"> <li>Site assessments undertaken (except in TORBA) from an infrastructure perspective.</li> <li>Recommendations not yet adopted, Provincial Tourism Officers to work with their Provincial Government to adopt recommendations.</li> <li>Consider including into Destinal Management Plans</li> </ul>
3.4 Review and revise VIPA functions to increase transparency, remove impediments to investment and any potential conflict of interest; include in the review recommendations to Streamline business registration and investment approvals process to facilitate investment	Medium	VIPA/DESD/Donors	Study completed and recommendations adopted	Progressing	<ul style="list-style-type: none"> <li>Amendment to VIPA bill currently before Parliament. Amended Act will address some of the issues, including changes to Administering the Act</li> <li>Some issues will be addressed in the next plan.</li> </ul>
3.5 Review investment restrictions for tourism operations, including inbound tour operator	High	VIPA/Industry/. Donors	Study completed and recommendations adopted		<ul style="list-style-type: none"> <li>Amendment to VIPA bill currently before Parliament.</li> <li>Potential to support NiVanuatu tourism operators through business mentoring programmes and other business training</li> </ul>
3.6 Request IFC/World Bank to implement 'Tourism Diagnostic Tool' and incorporate findings into the ongoing tourism planning process	High	MoT/NTDO/IFC	Study completed and recommendations adopted	Progressing	<ul style="list-style-type: none"> <li>Study completed by IFC and recommendations made.</li> <li>Requires more work to coordinate implementation of recommendations.</li> <li>Requires funding to support implementation of recommendations.</li> </ul>
3.7 Initiate and implement a longer term assistance program to support the development of small guesthouses in the outer islands	Medium	NTDO/Donors/Industry	Program designed and implemented		<ul style="list-style-type: none"> <li>Consideration to be given in updated Strategic Action Plan to develop a 'Business Enterprise Hub' to provide support to small business.</li> </ul>
3.8 Develop and implement a tourism investment strategy which clearly identifies investment opportunities and potential investors, together with goals and support requirements for implementation.	High	NTDO/VIPA	Investment strategy designed and implemented	Not started	<ul style="list-style-type: none"> <li>VIPA currently drafting the implementation of the strategy.</li> <li>Still require support to develop a specific tourism investment strategy</li> </ul>

### Strategy Three: Investment and Product Development

*Support greater local and international participation in the sector by improving the business enabling environment, investment attractiveness and product range of Vanuatu*

Action	Priority	Responsibility	KPI	STATUS	REMARKS
3.9 Encourage competition in utilities and telecommunications sectors by developing a strategic plan to open up competition in these sectors	High	MoPWU/DESD/ DoF	Strategy developed and adopted		<ul style="list-style-type: none"> <li>There is a connectivity fund to look at specific telecommunication issues. Fund is administered by AusAID and is open to applications from anyone.</li> <li>Issues around water and the cost of energy are still an ongoing issue for tourism operators.</li> </ul>
3.10 Support Green Tourism initiatives including the encouragement of investment in renewable energy through removal of tariffs and duty	Medium	MoPWU/DoF	Tariffs and duties revised	Complete	<ul style="list-style-type: none"> <li>Currently undertaken by the Energy Department.</li> </ul>
3.11 Establish the requirements for increased resourcing and capacity building in key law and order institutions	High	MHA/DoF/CoM/ Donors	Scoping study adopted		<ul style="list-style-type: none"> <li>Being addressed by other projects.</li> </ul>
3.12 Develop a proactive strategy to manage the impact from emerging markets, such as China	Medium	NTDO/FA/VTO/ Industry	Strategy developed and adopted		
3.13 Undertake a study into existing leakages in the tourism sector and develop a program to increase the level of local supplies and linkages into the tourism sector	High	NTDO/DESD	Study published and findings endorsed		
3.14 Support expansion and commercialization of the arts and music in Vanuatu and encourage integration into the tourism sector through special events	Medium	NTDO/Cultural Centre/VTO	Program developed for promotion	Not Started	<ul style="list-style-type: none"> <li>To be included in the development of the Sustainable Tourism Development Policy through the next Action Plan</li> </ul>
3.15 Develop and support a market access program for tourism SMEs which focuses on internet access and product distribution support	Medium	VTO/DESD/Donors	Market access supported and specific outputs in relation to improved market access achieved	Progressing	<ul style="list-style-type: none"> <li>Some work undertaken, for example the MALAMPA Call Centre and the proposal for the Santo Call Centre.</li> <li>A feasibility study for a National booking system to be undertaken through the next Action Plan</li> <li>All projects require donor funding</li> </ul>
3.16 Provide training and support to tourism SMEs in tourism marketing which focuses on internet distribution	Medium	VTO/Donors/DESD /MIT	Marketing program implemented and SME capacity developed	Progressing	<ul style="list-style-type: none"> <li>SPTO currently undertaking web development for NiVanuatu Tourism SMEs across the Pacific including Vanuatu.</li> </ul>
3.17 Develop a Cruise Ship Strategy and actively promote Vanuatu as a cruise ship destination	Medium	NTDO/P&M/ Donors	Cruise ship strategy developed and country profile increased	Complete	<ul style="list-style-type: none"> <li>Cruise Strategy launched Jan 2013.</li> <li>Review the Strategy to include aspects of Sustainability across the Strategy.</li> </ul>

### Strategy Four: Infrastructure and Access

#### *Increase destination accessibility and infrastructure use and viability through strategic investment, maintenance and market development*

Action	Priority	Responsibility	KPI	STATUS	REMARKS
4.1 Develop and implement an international aviation strategy to increase international air services to Vanuatu by securing direct or one stop services from Asia/Europe/USA and promoting Vanuatu as a hub for connections to other Pacific destinations	High	CAA/AVL/DESD/Airlines	Aviation Strategy developed and adopted	Progressing	<ul style="list-style-type: none"> <li>AVL have prepared a report for Vanuatu Government, includes upgrades of International Airports, in particular Bauerfield Airport.</li> <li>Upgrade works and equipment requires Government or Donor funding.</li> <li>Need an Aviation Policy for CAA to guide the industry and stakeholders.</li> </ul>
4.2 Ensure that the Aviation Strategy is linked to an Airports Development Plan which identifies infrastructure development requirements and sequencing	High	CAA/AVL/DESD/Airlines	Airports Master Plan developed and adopted		<ul style="list-style-type: none"> <li>Report completed, but not yet signed off by Government</li> </ul>
4.3 Upgrade facilities at Tanna airport to allow night landings (generator and runway lights)	Medium	AVL	Tanna airport operational at night	Complete	<ul style="list-style-type: none"> <li>Works to install lights yet to be undertaken. Awaiting Donor funding (AusAID). Expect to be completed by the end of 2013.</li> </ul>
4.4 Complete the Air Services Agreement for operations between Tanna and New Caledonia	High	PMS/CAA	Air Services Agreement signed	Complete	<ul style="list-style-type: none"> <li>Consider reviewing the Air Services Agreement (because of the upgrade of Whitegrass Airport).</li> </ul>
4.5 Negotiate for charter or scheduled services between New Caledonia and Tanna/Vila/Santo and support with marketing funding	Medium	CAA/Airlines/VTO	Air services operations to Tanna from New Caledonia		<ul style="list-style-type: none"> <li>Need to formalise and implement.</li> </ul>
4.6 Coordinate Strategic Review of Ports Facilities and consolidate maritime infrastructure planning and management including (as a priority) the upgrading of Port Vila main wharf into a policy framework for the maintenance and operation of maritime facilities	Medium	DESD/P&M/Infra/Donors	Strategic Ports Plan developed and adopted	Progressing	<ul style="list-style-type: none"> <li>Still work to be undertaken in this area for a review of Ports facilities etc.</li> <li>Some activities have been started, but require more funding, ie hydrographical mapping; Vanuatu Tourism Infrastructure project (wharf upgrade).</li> </ul>
4.7 Conduct a feasibility to support the development of inter-island transport suitable for the tourist market including upgrading of outer island wharfs	Medium	P&M/Provinces/Industry/DESD	Feasibility study developed and private sector investment mobilised	Progressing	<ul style="list-style-type: none"> <li>ADB &amp; NZAid currently developing a programme to subsidise inter-island shipping company as a pilot project.</li> </ul>
4.8 Develop a domestic aviation strategy aimed at reducing cost and increasing the quality of service and ensure that domestic fares are provided on an open and competitive basis for all visitors	Medium	CAA/AVL/Airlines	Strategy developed and endorsed		<ul style="list-style-type: none"> <li>Work still to be undertaken to develop a National Policy on this, and a Strategy.</li> <li>Study undertaken on developing GPS procedures in lieu of Air Charts for domestic airports.</li> </ul>
4.9 Use the Provincial Tourism Plans to identify Tourism Development Zones in key locations and support their development through infrastructure and supporting services prioritization	High	Provinces/PWD/DESD/NTDO	Prioritized program of maintenance in place and operationalised		<ul style="list-style-type: none"> <li>Department of Local Authorities working with Provincial Governments on Tourism Zones.</li> <li>Currently in draft, due for release by the end of 2013.</li> </ul>
4.10 Conduct a study to identify opportunities for private sector investment in infrastructure	Medium	DESD/Mol	Study results endorsed		
4.11 Maintain and improve roads and pavements frequented by tourists	High	Provinces/Municipalities	Key roads and pavements incorporated into ongoing maintenance program		

**Strategy Four: Infrastructure and Access**

*Increase destinational accessibility and infrastructure use and viability through strategic investment, maintenance and market development*

Action	Priority	Responsibility	KPI	STATUS	REMARKS
4.12 Develop town beautification schemes for Luganville and Port Vila, based on improvements to public space and tourist attractions, including public toilets and landscaping in key locations	Medium	Municipalities/PWD	Town beautification and maintenance programs implemented	Progressing	<ul style="list-style-type: none"> <li>Government has released a Beautification Plan for Port Vila (that includes the proposals developed by BECA for the Vanuatu Tourism Infrastructure Project.</li> <li>Currently looking for donor support for implementation.</li> <li>Need to prepare a Beautification Plan for Luganville.</li> </ul>
4.13 Promote rural electrification, renewable energy and telecommunications to support tourism investment	Medium	Mol/Utility Providers	Increase in proportion of tourism operators covered by rural electrification, renewable energy and telecommunications		<ul style="list-style-type: none"> <li>Currently managed by the Energy Department of the Department of the Environment.</li> <li>Projects being undertaken by Climate Change office.</li> </ul>
4.14 Undertake a comprehensive reform of land transport including standards for taxis and public transport operators and regulations for tour operators	Medium	Min of Transport/LTB	Reform undertaken and new regulations implemented.	Progressing	<ul style="list-style-type: none"> <li>Department of Tourism have had the TCV Bill passed which includes minimum standards and compulsory accreditation for tourism businesses.</li> <li>Standards committee established 2013 which will review the legislation / regulations.</li> <li>NZAid funding an "Ambassadors Programme" to provide training for public transport operators.</li> </ul>

**Strategy Five: HRD and Education**

*Develop a coordinated approach to HRD planning and training delivery for the tourism sector which meets industry, government and community needs*

Action	Priority	Responsibility	KPI	STATUS	REMARKS
5.1 Create a Tourism and Hospitality Industry Training Committee (THITC) to coordinate training providers, course development and industry input	High	MoE/NTDO/IT/Industry Associations	THITC meets every quarter		<ul style="list-style-type: none"> <li>Coordination undertaken by training providers (APTTC/IT/HTLTC)</li> </ul>
5.2 Develop and implement a comprehensive HRD Education and Training Strategy for the tourism and hospitality sector which includes a future needs (long term) manpower survey for the industry	High	THITC	Study endorsed and published	Not started	<ul style="list-style-type: none"> <li>To be undertaken in the next Action Plan</li> </ul>
5.3 Establish a system of accreditation and registration for tourism and hospitality training providers	Medium	MoE/NTDO/Industry Associations	Accreditation system developed and adopted	Not started	
5.4 Establish an industry accreditation system with personal and business criteria (commencing with a review of the Vanuatu Tourism Accreditation Program)	Medium	NTDO/Industry Associations	Program designed and endorsed by government and industry	Progressing	<ul style="list-style-type: none"> <li>Vanuatu Tourism Accreditation Programme currently being developed.</li> </ul>
5.5 Design and implement a program to train additional workplace trainers in the industry	Medium	VIT/NTDO/Industry	Program designed and implemented	Not started	
5.6 Establish a training and mentoring program for rural tourism SME's aimed at outer island operators	High	NTDO/VCCI/Industry Associations/VIT	Program designed and implemented		<ul style="list-style-type: none"> <li>Some work undertaken through TVET (Malampa &amp; Sanma).</li> <li>Opportunity for more work to be undertaken in this area, for example by establishing <i>Business Enterprise hub</i>.</li> </ul>
5.7 Develop and implement a tourism awareness program which is supported by government and the industry associations	High	NTDO/Industry Associations	Program designed and implemented	On going	<ul style="list-style-type: none"> <li>Awareness workshops held informally across the Provinces through the DoT Tourism Officers.</li> <li>Requires additional support to strengthen the industry assns.</li> </ul>
5.8 Incorporate tourism into the secondary school curriculum	Medium	MoE/NTDO/Industry Associations	Secondary school curriculum adopted	Not started	
5.9 Provide access to tertiary level management programs and link sector needs more closely to scholarships programs	High	Donors/MoE/NTDO	Increase in tourism and hospitality scholarships	Not started	

**Strategy Five: HRD and Education***Develop a coordinated approach to HRD planning and training delivery for the tourism sector which meets industry, government and community needs*

Action	Priority	Responsibility	KPI	STATUS	REMARKS
5.10 Undertake a feasibility on the introduction of a compulsory Training Levy	Medium	NTDO/MoE	Feasibility published and results endorsed	Not started	
5.11 Introduce a compulsory counterpart program for management positions in the tourism and hospitality industry to improve local management skills and capacity	Medium	NTDO/MoL/ Industry	Counterpart scheme introduced		
5.12 Extend the Australian/NZ seasonal workers scheme to facilitate work experience overseas for Ni Vanuatu tourism and hospitality (and associated trades) workers	Medium	MoL/MFA	Seasonal workers scheme extended	Not started	

## Appendix 2: Reports relevant to the Vanuatu Strategic Tourism Action Plan

The core documents are:

- The Vanuatu Priority Action Agenda 2006-2015 (GOV)
- The Vanuatu Government Trade Policy Framework 2012 (GOV)
- The Vanuatu Tourism Development Master Plan 2004-2010 (EU)
- The Vanuatu Tourism Action Plan 2008-2013 (GOV)
- The Vanuatu Department of Tourism Business Plan 2011-2012 (D.O.T.)
- The Vanuatu Tourism Office Business Plan 2013-2015 (SPTO)
- The six (6) Vanuatu Provincial Tourism Plans 2011 (GOV)
- The National Cruise Tourism Action Plan 2012-2020 (GOV)
- The Millennium Challenge Account Tourism Study 2007 (TRIP Consultants)
- The Pacific Regional Tourism Hospitality Human Resources Development Plan 2013
- The Travel and Tourism Economic Impact Study Vanuatu 2013 (WTTC)

Other reports include:

- The Draft Vanuatu National Environment Policy (June 2013) (GOV)
- The Vanuatu Tourism Impediments Diagnostic Report (2010) (IFC)
- The Port Vila Municipal Council Beautification Proposal (2010) (BECA Ltd.)
- The IFC Study on cost of doing business in Vanuatu (2011) (IFC)
- The Millennium Challenge Account – Vanuatu, Tourism Study (2011) (MCA)
- The Governance for Growth Infrastructure (2011)
- The ADB Drainage and Sanitation Study (2011)
- The Ministry of Finance Waste Management Proposal (2011)
- The Waterfront Development in Port Vila, Ministry of Commerce (2011)
- The Vanuatu Tourism Infrastructure Project – Seafront Seawall Condition Assessment Plan (2012 – BECA)
- The Vanuatu Traffic and Pedestrian Management Plan: Road Hierarchy Management Plan (BECA 2012)
- Sharing the Riches of Tourism in Vanuatu by Regina Scheyvens and Matt Russell, Massey University 2013
- Vanuatu Tourism Opportunity Assessment – Draft 2012 – Craig Wilson (MFAT)



- Tourism Blong Yumi Evriwan – The Role of VSA volunteers in supporting indigenous tourism development in Vanuatu, Andrew Johnston, Kelle Howson and Peter Swain, 2013 (NZVSA)
- Women in Vanuatu – Analysing Challenges to Economic Participation (2009) (World Bank)
- Bungalow Standards Guide – A guide to bungalow businesses for tourism operators in rural Vanuatu, DOT, 2013
- South Pacific Regional Handicraft Project, L. Twining-Ward and C. Delany (2011) (NZAID Programme)

In addition to these reports there are 4 committed studies, either underway or being commissioned this year. These include:

- The International Visitor Survey by SPTO (2013)
- The Cruise Ship Survey by SPTO (2013)
- The IFC-funded Tourism Economic Impact Study (2013)
- The IFC-funded Accommodation Standards Options Study