

南太平洋島嶼国観光教育セミナー

UNWTO Regional Seminar TOURISM EXCHANGE FOR SMALL ISLANDS

デンパサール インドネシア
Denpasar, Indonesia

スバ フィジー
Suva, Fiji

ディリ 東ティモール
Dili, Timor-Leste

ポートビラ バヌアツ
Port Vila, Vanuatu

マレ モルジブ
Male, Maldives

2011.2.22-23

実施報告書 REPORT



開催趣旨 ◆ OBJECTIVE

アジア・太平洋の島嶼諸国の多くは、豊かな自然と文化的、歴史的観光資源に恵まれている。それらの中には、既に観光開発の成果を得ている国もあれば、これから観光振興をはかろうという国もある。

この度、我々は、日本と共にUNWTOメンバーである島嶼国のフィジー、インドネシア、モルジブ、東ティモール、バヌアツの5カ国とこの会議を開催することにより、各国が観光資源を紹介し、特に日本人観光客受け入れのための戦略を検証する場を設けることとした。参加国相互の情報やノウハウの共有は、UNWTOメンバーである島嶼諸国の観光振興を刺激し、その発展の筋道になるであろう。

我々は、このセミナーが貧困の削減という国連のミレニアムゴールへの到達と持続的発展へのアプローチに、観光を通して貢献することを確信する。

Most of the island countries in Asia and the Pacific are proud of having numerous rich resources in nature, cultures and histories for tourism. Some countries have succeeded in tourism development while others have just started to develop.

Therefore, we will hold this seminar with 5 island countries: Fiji; Indonesia; Maldives; Timor-Leste; Vanuatu with Japan, to provide each UNWTO island member the opportunity to review the tourism situation by presentation/report about their country's current tourism resources, and to find the strategies especially for attracting more Japanese tourists to each country. By exchanging each country's tourism experiences and know-how, the UNWTO colleagues can stimulate and collaborate one and another for the further development.

We strongly believe this seminar will contribute to reach the United Nation's Millennium Goals of eradicating poverty, in addition to ensuring sustainable development through tourism.

開催概要 ◆ OUTLINE

会議名称：南太平洋島嶼国観光教育セミナー

開催日程：2011年2月22日～2月23日

主催：世界観光機関（UNWTO）、財団法人アジア太平洋観光交流センター（APTEC）
世界銀行東京開発ラーニングセンター（TDLC）

後援：日本国外務省、観光庁

協力：日本財団、社団法人日本旅行業協会（JATA）、国際協力機構（JICA）

会場：世界銀行東京開発ラーニングセンター（日本）

ウダヤナ大学ラーニングセンター（デンパサール、インドネシア）

世界銀行ディリ・ラーニングセンター（東ティモール）

南太平洋大学（USP）（スバ、フィジー）

UNICEFマレ事務所（モルジブ）

オーストラリア大使館（ポートビラ、バヌアツ）*ビデオ会議システムによる同時開催

参加者：280名（各日140名）

Name: UNWTO Regional Seminar TOURISM EXCHANGE FOR SMALL ISLANDS

Date: February 22-23, 2011

Organized by:

World Tourism Organization (UNWTO)

Asia Pacific Tourism Exchange Center (APTEC)

The World Bank Tokyo Development Learning Center (TDLC)

Under the Auspices of:

Ministry of Foreign Affairs of Japan (MOFA)

Japan Tourism Agency (JTA)

With the Cooperation of:

The Nippon Foundation

Japan Association of Travel Agents (JATA)

Japan International Cooperation Agency (JICA)

Venue:

The World Bank Tokyo Development Learning Center, Japan

University of Udayana Distance Learning Center—GDLN, in Denpasar, Indonesia

The World Bank Dili Distance Learning Center, Timor-Leste

University of the South Pacific (USP) in Suva, Fiji

UNICEF Male Office, Maldives

Australian Embassy in Port Vila, Vanuatu

*connected to the network system provided by the World Bank

Participants: 280 persons (140 persons/day)

プログラム

2月22日(火) — 1日目

東京時間

* 司会：ポール・ロジャース 世界観光機関（UNWTO）コンサルタント

- 9：10 開会挨拶
本田勇一郎 世界観光機関（UNWTO）アジア太平洋センター 代表
ハリー・ファン 世界観光機関（UNWTO）アジア太平洋地域部 副部長
内藤 智之 世界銀行東京開発ラーニングセンター（TDLC）マネージャー
長谷川和義 社団法人日本旅行業協会（JATA）事務局長
アハメド・カリール 在日本国モルジブ大使
- 9：30 基調講演1 「太平洋島嶼国のサステナブル・ツーリズムと人材育成」
梅村 哲夫 琉球大学 観光産業科学部 教授
- 10：10 基調講演2 「南太平洋島嶼国の観光交流促進」
保坂 明彦 社団法人日本旅行業協会（JATA）海外旅行部マネージャー
- 10：50 フィジーによる報告「フィジー観光の最新レポート」
ファネ・ベイブ フィジー公共事業・通信・航空・観光省 観光部長
- 11：10 バヌアツによる報告「バヌアツ現状報告」
ジャスティン・ジョンソン 観光マーケティング開発ファンド会長
- 11：30 パネル・ディスカッション1
モデレーター：ポール・ロジャース 氏
パネリスト：フィジー、インドネシア、東ティモール、バヌアツのパネリスト
梅村 哲夫 氏、保坂 明彦 氏
- 12：30 パネル・ディスカッション1のまとめと提案
ポール・ロジャース 氏
- 12：50 休憩
- 14：10 東ティモールによる報告「東ティモールの観光計画と観光開発」
ジョゼ・キンタス 東ティモール観光経済省 国家観光部長
- 14：30 インドネシアによる報告1 「島嶼国のサステナブル・ツーリズム」
アリー・スハンディ インドネシア・エコツーリズム・ネットワーク（Indecon）部長

- 14：50 **インドネシアによる報告2「バリ」**
イ・マデ・スアルナタ ヤヤサン・ウィスヌ（エコツーリズム団体）部長
- 15：10 **モルジブによる報告「モルジブにおける島の観光開発」**
アハメド・サリー モルジブ観光芸術文化省 事務次官
- 15：30 **世界銀行による講演「IFC/観光と太平洋島嶼国 挑戦と機会」**
シャウン・マン 世界銀行グループ 観光投資政策官

2月23日(水) ー2日目

東京時間

- 12：10 **一日目のレビュー**
ポール・ロジャース 氏
- 12：30 **講演**
ポール・ロジャース 氏・梅村 哲夫 氏
- 12：50 **パネル・ディスカッション2**
モデレーター：ポール・ロジャース 氏
パネリスト：インドネシア、モルジブ、東ティモール、バヌアツからのパネリスト
梅村 哲夫 氏、保坂 明彦 氏
- 14：50 **パネル・ディスカッション2のまとめと提案**
ポール・ロジャース 氏
- 15：10 **閉会挨拶**
本田勇一郎 世界観光機関（UNWTO）アジア太平洋センター 代表
ハリー・ファン 世界観光機関（UNWTO）アジア太平洋地域部 副部長
堀江 信幸 世界観光機関（UNWTO）アジア太平洋センター 副代表

PROGRAMME

<Day 1> February 22, 2011

Tokyo Time

MC. UNWTO Consultant: **Dr. Paul Rogers**

- 9 : 10 **Opening Ceremony**
Mr. Yuichiro Honda, Chief, UNWTO Regional Support Office for Asia and the Pacific
Mr. Hae-guk Harry Hwang, Deputy Director, UNWTO Regional Programme for Asia and the Pacific
Mr. Tomoyuki Naito, Manager, The World Bank Tokyo Development Learning Center (TDLC)
Mr. Kazuyoshi Hasegawa, Secretary General, Japan Association of Travel Agents (JATA)
H. E. Mr. Ahmed Khaleel, Ambassador to Japan, Republic of Maldives
- 9 : 30 **Keynote Presentation 1**
“Sustainable Tourism and Human Resource Development in Pacific Island Countries”
by **Dr. Tetsuo Umemura**, Professor, Faculty of Tourism Sciences and Industrial Management,
University of the Ryukyus
- 10 : 10 **Keynote Presentation 2**
“Encouraging Tourism Exchange with South Pacific Island Countries”
by **Mr. Akihiko Hosaka**, Manager, Outbound Travel Division, Japan Association of Travel Agents (JATA)
- 10 : 50 **Report from Fiji**
“Fiji Tourism Update”
by **Ms. Fane Vave**, Director of Tourism, Ministry of Public Enterprises, Communications, Civil Aviation
and Tourism
- 11 : 10 **Report from Vanuatu**
“Vanuatu Status Report”
by **Mr. Justin Johnson**, Chairman for the Tourism Marketing Development Fund (TMDF)
- 11 : 30 **Panel Discussion 1**
Main Moderator : **Dr. Paul Rogers**
Panelists from Fiji, Indonesia, Timor- Leste, Vanuatu, **Dr. Umemura**, **Mr. Hosaka**
- 12 : 30 **Conclusion and Recommendation for Panel Discussion 1**
by **Dr. Paul Rogers**
- 12 : 50 **Break**

- 14 : 10 **Report from Timor-Leste**
“Tourism Planning and Development in Timor-Leste”
by **Mr. Jose Quintas**, Tourism National Director, Ministry of Tourism, Trade and Industry
- 14 : 30 **Report from Indonesia 1**
“Sustainable Tourism Development in Small Island ”
by **Mr. Ary Senjaya Suhandi**, Executive Director Indonesian Ecotourism Network (Indecon)
- 14 : 50 **Report from Indonesia 2**
“BALI”
by **Mr. I Made Suarnatha**, Executive Director of Yayasan Wisnu
- 15 : 10 **Report from Maldives**
“Island Tourism Development in the Maldives”
by **Mr. Ahmed Salih**, Permanent Secretary, Ministry of Tourism, Arts and Culture
- 15 : 30 **Presentation by The World Bank**
“IFC, Tourism & the Pacific Islands Challenges & Opportunities”
by **Mr. Shaun Mann**, Senior Tourism Investment Policy Officer, The World Bank Group

<Day 2> February 23, 2011

Tokyo Time

- 12 : 10 **Review of the first day**
by **Dr. Paul Rogers**
- 12 : 30 **Presentation**
by **Dr. Paul Rogers and Dr. Tetsuo Umemura**
- 12 : 50 **Panel Discussion 2**
Main Moderator: **Dr. Paul Rogers**
Panelists from **Indonesia, Maldives, Timor- Leste, Vanuatu, Dr. Umemura, Mr. Hosaka**
- 14 : 50 **Conclusion and Recommendation for Panel Discussion 2**
by **Dr. Paul Rogers**
- 15 : 10 **Closing Remarks**
Mr. Nobuyuki Horie, Deputy Chief, UNWTO Regional Support Office for Asia and the Pacific
Mr. Hae-guk Harry Hwang, Deputy Director, UNWTO Regional Programme for Asia and the Pacific
Mr. Yuichiro Honda, Chief, UNWTO Regional Support Office for Asia and the Pacific

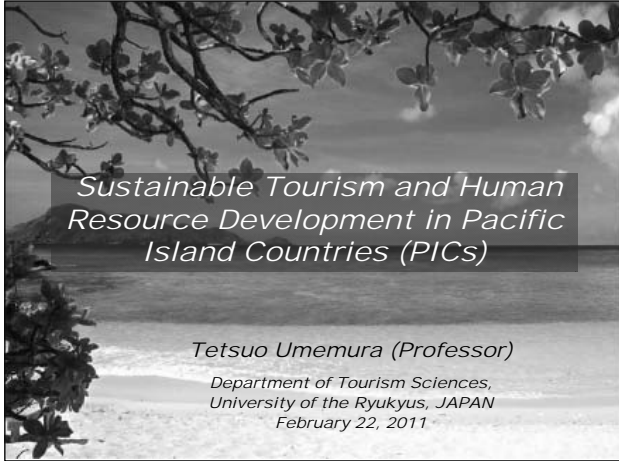
基調講演 ◆ KEYNOTE PRESENTATIONS

■ 「太平洋島嶼国のサステナブル・ツーリズムと人材育成」

“Sustainable Tourism and Human Resource Development in Pacific Island Countries”

梅村 哲夫 琉球大学 観光産業科学部 教授

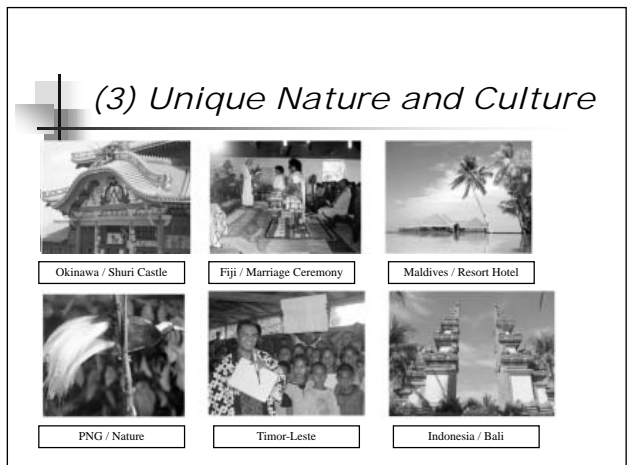
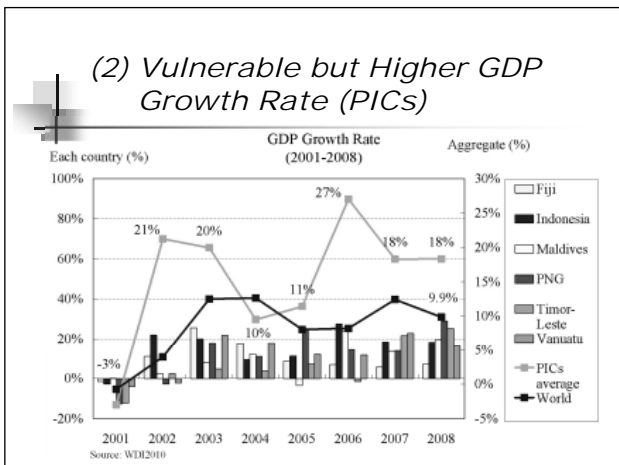
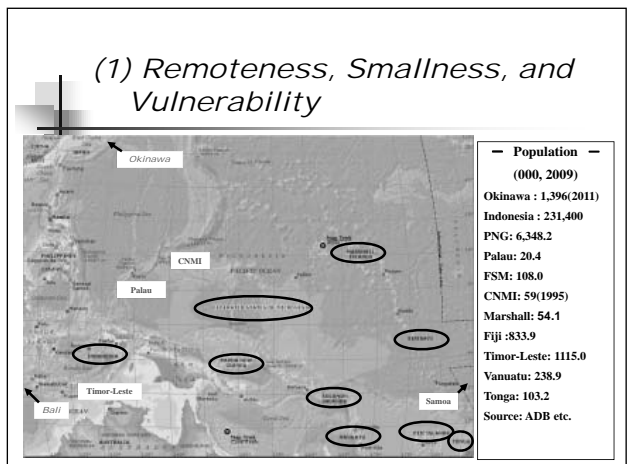
Dr. Tetsuo Umemura, Professor, Faculty of Tourism Sciences and Industrial Management, University of the Ryukyus

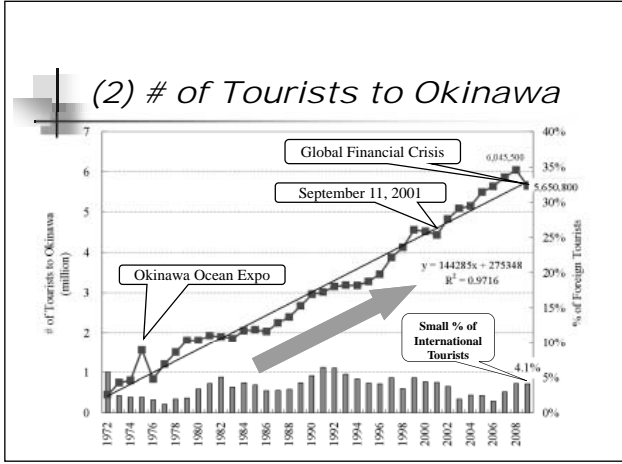
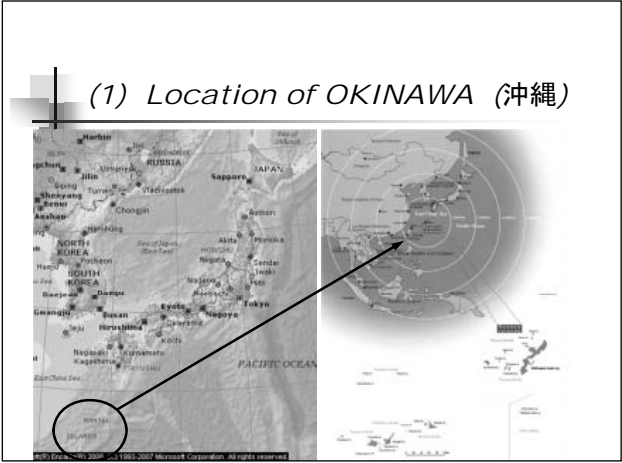
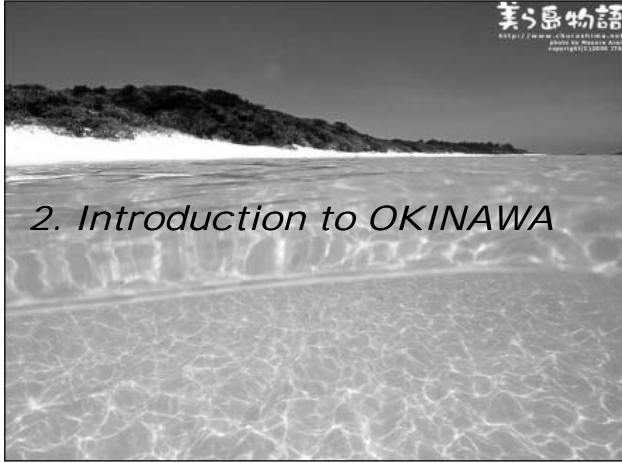


- “Sustainable Tourism and HRD in Pacific Island Countries”*
1. Characteristics and uniqueness of Island Countries
 2. Introduction to Okinawa
 3. Curriculum policy of the Department of Tourism Sciences, University of the Ryukyus
 4. JICA Workshop in Okinawa “Sustainable Tourism Development in Oceania” since 2006.
 5. Human Resource Development for Sustainable Tourism in PICs

1. *Characteristics and the uniqueness of Island Countries*

- Remoteness, Smallness, Vulnerability
- Unique Nature and Culture
- Rich Natural Resources





Unique Culture

祭祀

Festivals

Prayerful hearts and festival power herald a new dawn

Respect for the spirit of ancestral gods is the heart of festival activities. There is a sense of awe and reverence for the gods. The festival is a time when the people pray for a good harvest and a peaceful life. The festival is a time when the people pray for a good harvest and a peaceful life. The festival is a time when the people pray for a good harvest and a peaceful life.

Longevity & Healthy Foods

長寿食

Longevity & Diet

The Okinawan diet is a hallmark of health and longevity

Okinawan women are World Highest Life Expectancy

Low Calorie and Healthy Food

Tourism Spots

World-class Tourism and Resorts

World-class Tourism and Resorts

World-class Tourism and Resorts

World-class Tourism and Resorts

World-class Tourism and Resorts

World-class Tourism and Resorts

Training Camp for Professional Baseball Teams

Source: Okinawa Convention and Visitors Bureau (OCVB)

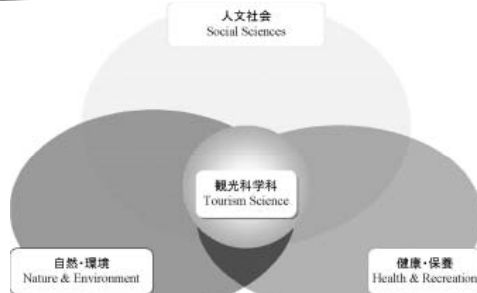
3. Curriculum policy of the Department of Tourism Sciences (DTS), University of the Ryukyus

Brief History of the Department of Tourism Sciences (DTS)

- April 2005: DTS was established (students: 40)
 - The first Tourism-related National University in Japan
 - Other National University w/ tourism related
 - Yamaguchi University (Students: 30)
- April, 2007 : Students: 60
 - Established in Wakayama University (80 students)
 - Established the graduate school in Hokkaido University
 - Master :15, Doctor: 3
- April 2009: Establish of the Graduate School of Tourism Sciences (GSTS, Masters course)

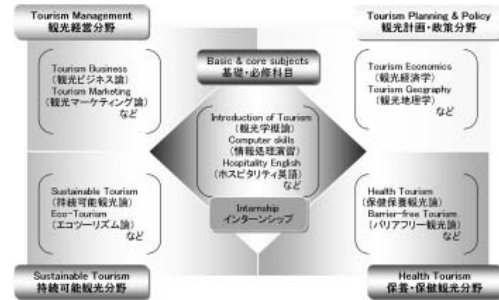
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The Conceptual Framework of DTS



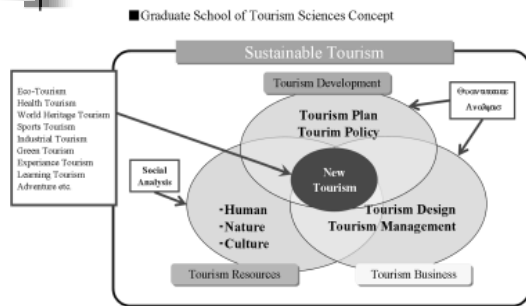
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Curriculum Structure (Undergraduate)



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Curriculum Structure Graduate School of Tourism Sciences (GSTS)



4. JICA Training in Okinawa "Sustainable Tourism Development in Oceania" since 2006.



General Information for 2010

- Training Title
 - Sustainable-Tourism Development in Oceania
- Duration
 - Jul. 26. to Sep. 10
 - 47 days
- Trainee
 - 6 countries, 10 persons
 - Kiribati, FSM, Nauru, Palau, PNG, Samoa, Solomon Island



Program Objectives and Overall Goals

- Objective:
 - Issues related to sustainable tourism development which participating organizations face will be isolated, and practical measures to address these issues will be formulated.
- Overall Goal
 - The action plan devised during training will be implemented, and plans for sustainable tourism development at the region level will be formulated.

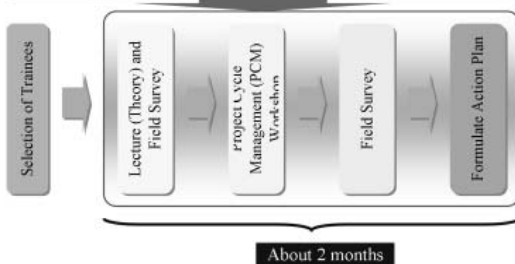
Objectives of the Workshop

- 1) Issues related to sustainable tourism revenue in the economies of small islands state will be resolved.
- 2) Issues related to conservation management and the utilization of tourism resources will be resolved.
- 3) Issues related to the roles tourism administration and the collaboration systems between various tourism related organizations will be resolved.
- 4) To be able to formulate an action plan on how to achieve sustainable tourism development in their own organizations.



JICA Training in OKINAWA Procedure

Funded by JICA. Academic support by DTS. Managed by NPO.



5. Human Resource Development for Sustainable Tourism in PICs

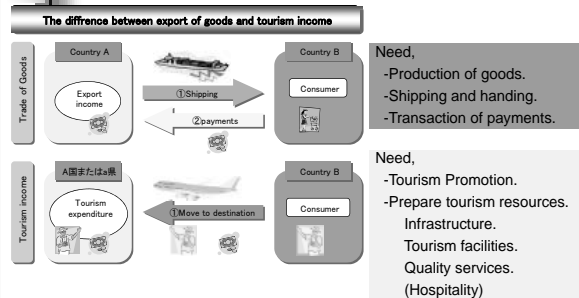
What does "International Tourism Receipt" mean?



- International Trade consists of "goods" & "services" .
- Export of goods are usually limited in Developing Countries. (except when there is some underground natural resources such as crude oil)
- International Tourism receipt means "Service Export"

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What is the difference between goods export and tourism income?



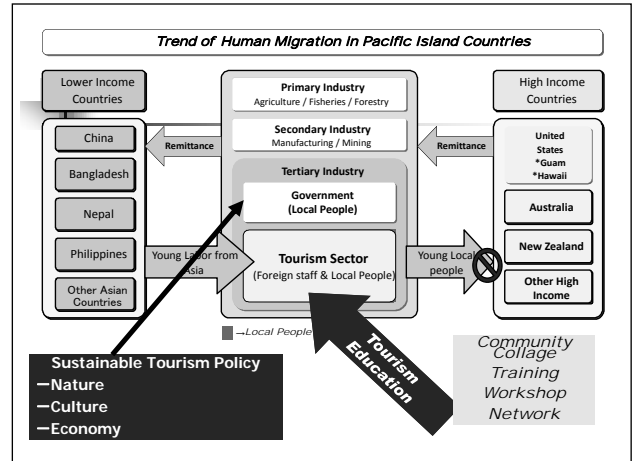
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Tourism is very important as a Service Export and Tourism Resources

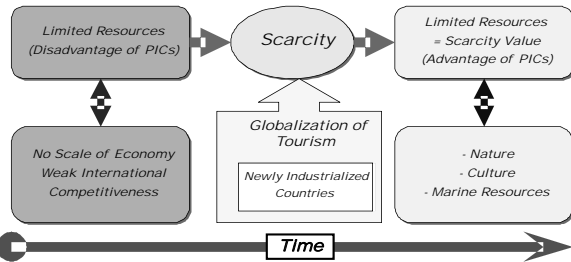


- Tourism is the most important foreign exchange income source for countries.
- Basically, PICs have not been well developed yet.
- Nature and Unique Culture are important tourism resources.
- "Nature and Culture " are comparative advantage in PICs.
- That is why, "Nature and Culture" as a tourism resources should be protected / preserved not only to earn foreign exchange but also to maintain a good standard of living for local people.

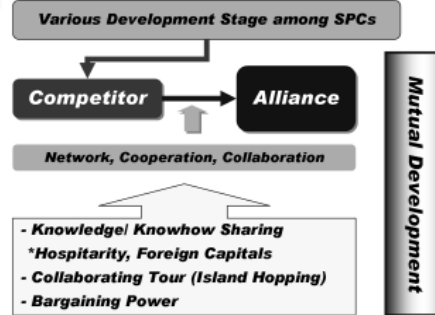
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Disadvantage to Advantage through Globalization in PICs Resources



Cooperative Framework From competition to cooperation



Thank you!

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■ 「南太平洋島嶼国の観光交流促進」

“Encouraging Tourism Exchange with South Pacific Island Countries”

保坂 明彦 社団法人日本旅行業協会（JATA）海外旅行部マネージャー

Mr. Akihiko Hosaka, Manager, Outbound Travel Division, Japan Association of Travel Agents (JATA)

JATA 日本旅行業協会
Japan Association of Travel Agents

もっ! 海外へ
Visit World Campaign

**Encouraging Tourism Exchange with
South Pacific Island Countries**

Presented by Mr. Akihiko Hosaka
Japan Association of Travel Agents (JATA)

Contents

1 Small Island Tourism by United Nations World Tourism Organization
Making Tourism Work for Small Island Developing States (ISBN 92-844-072-6)

- (1) Tourism Contribution in Small Island Countries
- (2) Problems of Small Island Countries in Tourism
- (3) Cruise Tourism

2 Sustainable Tourism in Japan for Small Islands

- (1) Case Study : Yakushima Island
- (2) Case Study : Ogasawara・Bonin Islands

3 Characteristics of the Japanese Outbound Market
Statistics & Other Characteristic Points

4 Proposals for Promotion at the Japanese Market

- (1) Cruise Promotion
- (2) Strategy to Media, Travel Industry & Consumers

5 Collaboration with JATA

- (1) Development of Japanese Speaking Guides Training
- (2) Human Resources Development
- (3) Development of Fair Trade Tourism

1 Small Island Tourism by World Tourism Organization

(1) Tourism Contribution in Small Island Countries
Characteristics of Small Island Countries

- ① Vulnerable to negative environmental & social impacts
- ② Limited resources, geographic dispersion & isolation from markets
- ③ Natural, cultural & heritage conditions are particularly vulnerable

↓

International tourism stimulates economic activity in terms of both income & employment generation, and contributes to gross domestic product

1 Small Island Tourism by World Tourism Organization
International Tourist Arrivals at Frontiers by Country of Destination

Countries	1990	2002	Growth 1990-2002
Fiji	279,000	398,000	142.7%
Cook Islands	34,000	73,000	214.7%
Kiribati	3,000	5,000	166.7%
Marshall Islands	5,000	6,000	120%
Niue	1,000	2,000	200%
Papua New Guinea	41,000	54,000	131.7%
Samoa	48,000	89,000	185.4%
Solomon Islands	9,000	?	
Tonga	21,000	37,000	176.2%
Tuvalu	1,000	1,000	100%
Vanuatu	35,000	49,000	140%
World Average	456,125,000	70,4278,000	154.4%

Growth %: Accumulated growth Source: WTO

1 Small Island Tourism by World Tourism Organization
International Trade & Tourism in 1998 Source: WTO

Countries	Tourism Service Export %	Tourism Total Export %
Fiji	51%	22%
Papua New Guinea	24%	4%
Samoa	66%	52%
Solomon Islands	13%	4%
Vanuatu	47%	36%

Example: Fiji
International tourism receipts accounted for 51% of its commercial service export total, and 22% of total exports from the country.

↓

Tourism offers one of the few opportunities for economic diversification in small islands.

1 Small Island Tourism by World Tourism Organization

(2) Problems of Small Island Countries in Tourism

- ① Waste Disposal → Malta: Eco Contribution Act of 2004
- ② Protection of Wildlife ↓ Costa Rica: Protected areas creating the foundation of a successful ecotourism industry
- ③ Damage to natural resources, such as corals, animals, and plants ↓ Maldives: Prohibition of activities to protect reef sharks

1 Small Island Tourism by World Tourism Organization

(3) Cruise Tourism: Statistics in 2000

Volume	① Cruise Sector	② International Tourism	①÷②%
Total No of tourists	9.6 million	697 million	1.4%
Average No. of nights	6.9	5	138%
Total revenue (US\$)	13 billion	477 billion	2.7%
Average / tourists (US\$)	1,841	685(a)	268.8%
Average/ nights (US\$)	193	136(a)	141.9%

Source: Compilation from WTO and data G.P. Wild International Limited used in WTO 2003
(a): In case of international tourism receipts the average is overestimated as it also includes receipts from same-day visits.

Cruise revenue: Almost 2 times compared to the No. of tourists
Average spending of cruise passengers: More than 2 times
Average spending per night: Almost 1.5 times

1 Small Island Tourism by World Tourism Organization

Example: Statistics of Caribbean Cruises

On-land Spending per Passenger in Caribbean Cruises in 1997

Port	US\$ / Passenger
Bahamas	83
Montego Bay	57
San Juan	158
St. Thomas	225
Average of 12 ports including the above	124

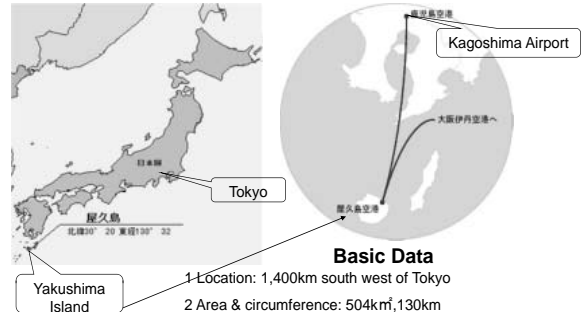
Source: Florida Caribbean Cruise Association

* Recent figures show that on-land expenditure in various Caribbean destinations ranged widely between US\$15 and 270 per passenger in 2001.
* It is surprising to note that still over a half of the cruise passengers visit restaurants at the destination.

2 Sustainable Tourism in Japan What are the Strategies of Eco Tourism in Japan?

- 1 Protection of Natural Environment**
Prevent air & water pollution, emission of green house gases
- 2 Tourism Promotion**
Promote tourist attractions through various media
- 3 Regional Development**
Tourism improves regional economy
- 4 Promotion of Education in Environment**
Many opportunities of outdoor education for students

Case Study 1 Eco-Tourism, UNESCO World Heritage Yakushima Island



Case Study 1 Eco-Tourism & UNESCO World Heritage Yakushima Island Protected Natural Tourist Resources



Cervus nippon yakushimae Kuroda & Okada, 1950



Macaca fuscata yakui



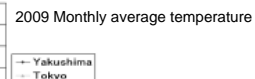
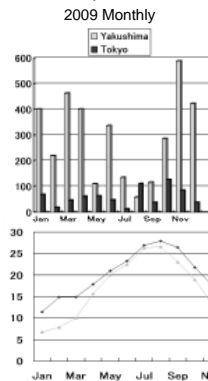
Yakushima "Jomonsugi" =
New Zealand "Tane Mahuta"



Sea Turtle

Case Study 1 Eco-Tourism & UNESCO World Heritage Yakushima Island

Precipitation in 2009, Tokyo & Yakushima Island



Case Study 1
Eco-Tourism & UNESCO World Heritage Yakushima Island
Policies to Protect Valuable Natural Animals & Plants
Promotion of Sustainable Tourism

- (1) Yakushima Guide Registration System
- (2) Development of ecological tours in the area
- (3) Implementation of rules for use & preservation of designated areas

Case Study 1
Eco-Tourism & UNESCO World Heritage Yakushima Island
Promotion of Sustainable Tourism
(1) Yakushima Guide Registration System
 Yakushima Tour Guide Committee was founded by tour guides in 1989.
The purposes of the Committee are:

- ① Preserve island's nature and local culture
- ② Communicate the beauty and importance of Yakushima by preserving the local heritage and tourism resources
- ③ Revitalize the region

The Committee is in charge of:

- ① Devising and implementing a guide registration system
- ② Organizing and conducting tour guide exams

Case Study 1
Eco-Tourism & UNESCO World Heritage Yakushima Island
Promotion of Sustainable Tourism
(2) Development of ecological tours in the local area

A model tour was conducted in Yakushima in 2004 and the local people exchanged opinions with visiting travel specialists.

Citizens → Working Group → Creation & Promotion → Tour programs involving local residents are sold as tours on the market.

Case Study 1
Eco-Tourism & UNESCO World Heritage Yakushima Island
Promotion of Sustainable Tourism
(3) Implementation of rules for use and preservation of designated areas

Citizens → Working Group → Studying & working on → Preservation Rules for the west part of the island, which is enlisted as a UNESCO Natural World Heritage site

Citizens → Working Group → Volunteer activities, such as cleaning tourist sites

Case Study 2
Sustainable Tourism, Ogasawara-Bonin Islands

Basic Data

- 1 Location: 1,000km south east of Tokyo
- 2 Consist of: more than 30 small islands, administrated by Tokyo Metropolitan Government
- 3 Population: 2,400 habitants (Chichijima & Hahajima only)
- 4 Climate: Subtropical

Case Study 2
Sustainable Tourism, Ogasawara-Bonin Islands
Public Transportation

MS Ogasawaramaru

Only public transportation between Japan & the Islands

Q: How long? A: 25.5 hours between Tokyo and Chichijima Island

Q: How many passengers? A: 6,700t, 1,043 passengers

Q: How often? A: One round trip takes six days

Q: Why no air transportation? A: To keep primitive & valuable nature

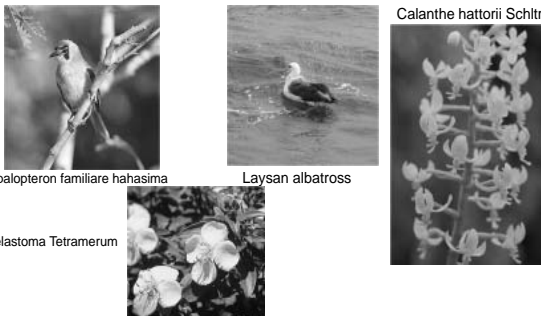
Q: How about the UNESCO World Heritage?
 Applying now & will be approved in 2012 or 2013

MS Hahajimamaru

* Once a day between Chichijima Isl. & Hahajima Isl.
 * Two hours one way

Case Study 2

Sustainable Tourism, Ogasawara·Bonin Islands “Galapagos of the East” Precious Species of Animals & Plants



Apalopteron familiare hahasima Laysan albatross Calanthe hattorii Schltr.

Melastoma Tetramerum

Case Study 2

Sustainable Tourism, Ogasawara·Bonin Islands Three Criteria for Becoming a World Heritage Site

- 1 Geology: A Notable example of the history of the Earth
- 2 Ecosystem: A notable example of the evolutionary development
- 3 Biological diversity: Habitat of rare species




1 Geology (Minamijima) 2 Ecosystem Biological Diversity

Submerged Karst Topography Ground Dwelling Mandarina Bonin Flying Fox

Case Study 2

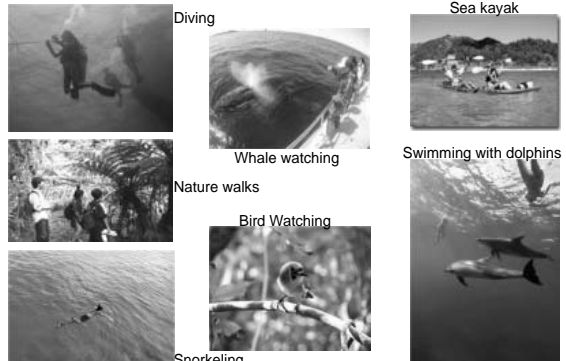
Sustainable Tourism, Ogasawara·Bonin Islands To preserve nature

- ① Only Public Transportation from Tokyo
Air transportation for emergency only
- ② Ogasawara Country Code
Ten conditions of living in harmony with nature
- ③ Important Intangible Cultural Property of Tokyo
South seas dancing and Kaka



Case Study 2

Sustainable Tourism, Ogasawara·Bonin Islands Popular Eco-Tours in Ogasawara



Diving Whale watching Sea kayak

Nature walks Bird Watching Swimming with dolphins

Snorkeling

Case Study 2

Sustainable Tourism, Ogasawara·Bonin Islands

Activities in English

<http://www.ogasawaramura.com/englishpage.htm>
<http://www.kankyo.metro.tokyo.jp/en/greenery/ogasawara.html>
http://www.kankyo.metro.tokyo.jp/en/attachement/panphlet_tokyo1_2.pdf

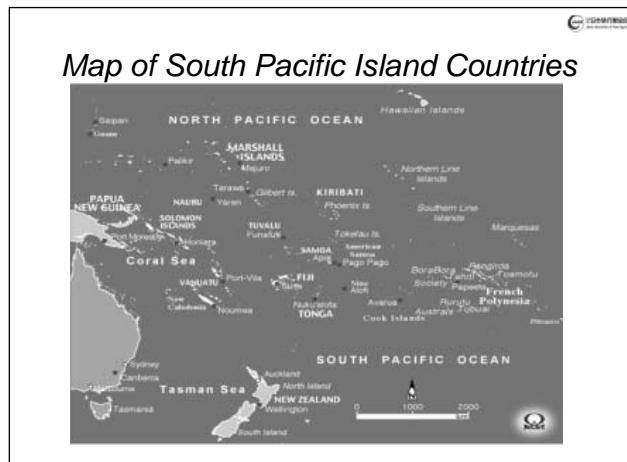
Logo Mark to promote the World Natural Heritage 

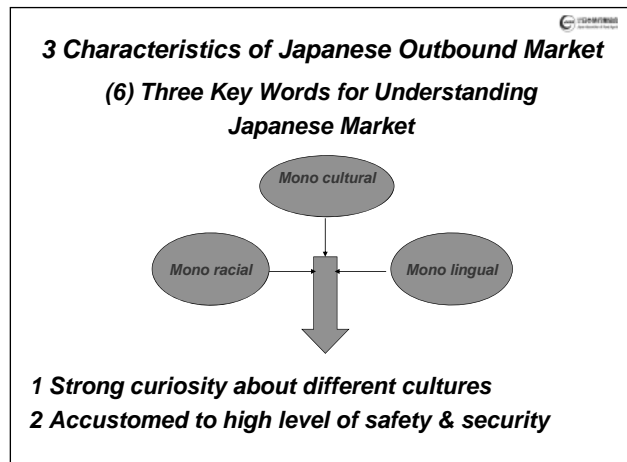
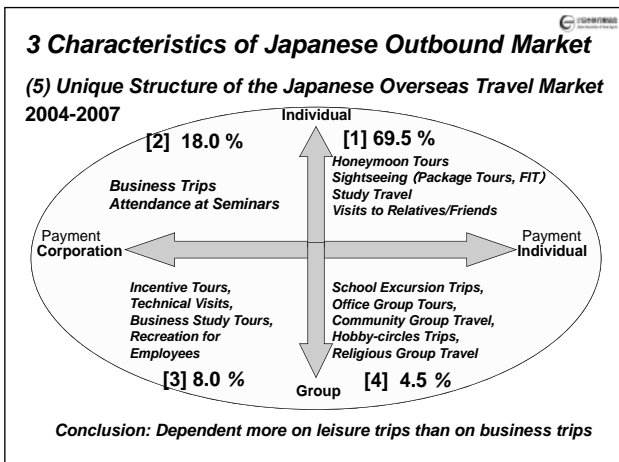
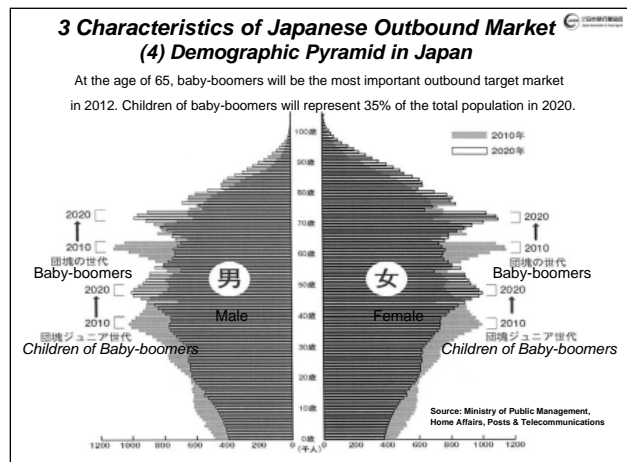
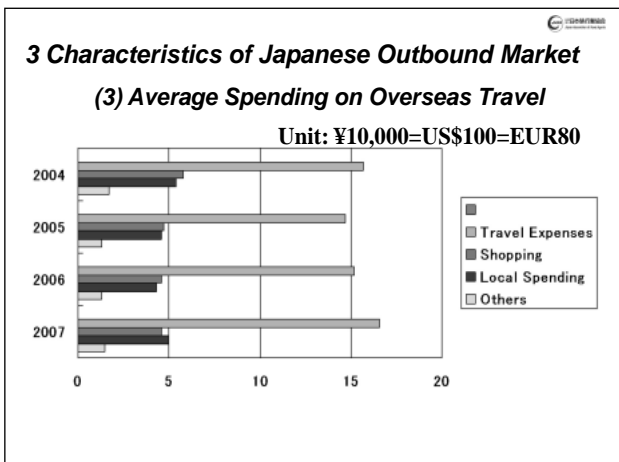
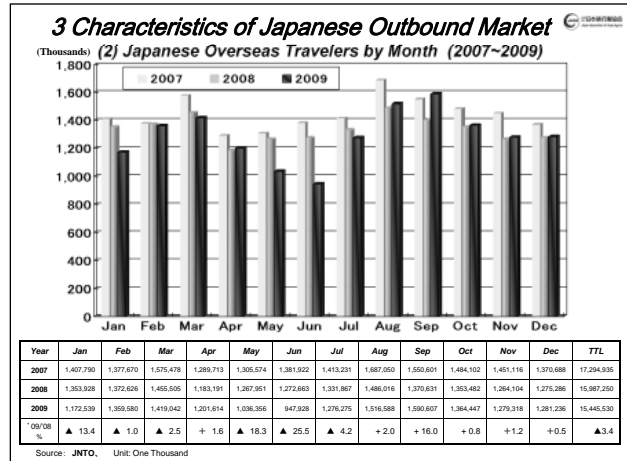
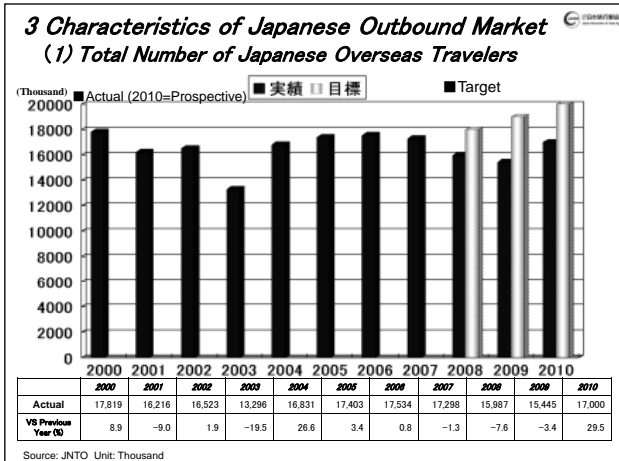
Chichijima Island

http://www.tokyo-islands.com/v3/e_contents/chichi/top.html
http://www.kankyo.metro.tokyo.jp/en/attachement/panphlet_tokyo3_2.pdf

Hahajima Island

http://www.tokyo-islands.com/v3/e_contents/haha/top.html
http://www.kankyo.metro.tokyo.jp/en/attachement/panphlet_tokyo3_4.pdf





3 Characteristics of Japanese Outbound Market

(7) Comfortable Accommodations with Attentive Service

- ① Clean and comfortable hotels are essential.
- ② Most senior, married couples prefer a room with two separate beds rather than one double bed.
- ③ Bathroom with a bathtub is essential.
- ④ Japanese-speaking hotel staff is preferred.



3 Characteristics of Japanese Outbound Market

(8) Qualified Japanese-speaking guides

Local guides need to have sufficient Japanese language ability to properly explain the local tourist attractions and culture.

3 Characteristics of Japanese Outbound Market

(9) Unique characteristics of the industry

- ① Rigid consumer protection system
- ② 800 overseas package tour travel agents
- ③ Dependence on qualified land operators (Tour operators)

3 Characteristics of Japanese Outbound Market

(9)-① Rigid consumer protection system

Under the Travel Agency Law

- ① Special compensation rules
- ② Guarantee of itinerary
- ③ Certified General Travel Services Manager
- ④ Business Guarantee Bonds by JATA

3 Characteristics of Japanese Outbound Market

(9)-② 800 overseas package tour travel agents

Marketing channels: 1. Brochures
2. Media (newspapers, magazines, TV)
3. Direct mail
4. Internet

(9)-③ Qualified Land operators essential



Direct transactions between travel agents in Japan & overseas suppliers are NOT preferred

3 Characteristics of Japanese Outbound Market

(10) Three key players influence the Japanese market

***Wholesalers, tour operators, travel agencies**
Responsible for package tour development, sales and operation.

***Consumers**

Influencing consumers on a direct level is most important so that they are inspired to visit your destination.

***Media**

Requires an effective public relations and advertising strategy.

4 Proposals for Promotion at the Japanese Market
1 Tourism in Small Island Developing States

Negative Impacts of Tourism
Water Pollution, Air Pollution, Noise Pollution, Traffic Congestion, Unattractive Landscapes, Littering, Ecological Disruption, Damage to Coastal & Marine Environments, Damage to Archaeological & Historic Sites

↓

Well planned, developed & managed tourism is required

4 Proposals for Promotion at the Japanese Market
1 Tourism in Small Island Developing States

The biggest problem faced by small island communities

↓

Access

OR

4 Proposals for Promotion at the Japanese Market
1 Tourism in Small Island Developing States

Which is more ecological?
Access by Sea (Cruise) or Air ?

↓

4 Proposals for Promotion at the Japanese Market
1 Tourism in Small Island Developing States

Why is cruise recommended?

↓

1 Smaller emissions of green house gases
 2 No need to construct accommodation facilities

▽

Protection of Natural Environment
Free from Water & Noise Pollution

4 Proposals for Promotion at the Japanese Market
2 Japanese Ocean Cruise Market

Source: Japan Tourism Agency

Results in 2009

Destination	Share (%)
Europe (Except Med)	29.3%
Asia	29.2%
Oceania, Micronesia, South Pacific	6.8%
Mediterranean	13.9%
Caribbean	2.8%
Others	18.0%

4 Proposals for Promotion at the Japanese Market
2 Japanese Ocean Cruise Market

Recommended Cruises

1 Duration: 4-13 day cruise clients constitute 49% of total cruise travelers.

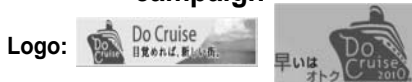
2 Gate Cities: SYD, BNE, CNS, OOL, AKL, CHC, NAN, NOU, HNL, PPT,
where direct flights from Japan are available.

3 Destinations: Visiting some of 13 countries of SPTO
 (SPTO=South Pacific Tourism Organization)

4 Seasons: *All year round, except the typhoon season in South Pacific*

4 Proposals for Promotion at the Japanese Market
2 Japanese Ocean Cruise Market

JATA is now running the “Cruise Year” campaign



http://cruiseyear.jp/consultation/consultation_info.php

Participating Cruise Lines: 20



4 Proposals for Promotion at the Japanese Market
2 Japanese Ocean Cruise Market

JATA is now running “Cruise Year” campaign

JATA’s Promotional Activities & Targets:

- ① Organizing cruise seminars & symposiums for travel agents & tourists, study tours, “Cruise of the Year” contest.
- ② Providing examinations & training programs to develop & retain knowledgeable personnel in the cruise market
http://www.jata-net.or.jp/tcmem/080514_h20ccinfo_mem.htm
- ③ The numerical target of cruise promotion is more than 200,000 of Japanese travelers

4 Proposals for Promotion at the Japanese Market
3 Strategy to Media, Travel Industry & Consumers

- ① Promote familiarity between the two countries.

The success story of France: Two World Heritage sites;
 Itsukushima Shrine in Japan & Mt. St. Michel in France



How close Japan & France are! (France 2009)

4 Proposals for Promotion at the Japanese Market
3 Strategy to Media, Travel Industry & Consumer

- ② Joint Establishment of Tourism Promotion Office in Japan

South Pacific Tourism Organization
 (13 participating countries)

<http://www.south-pacific.travel/spto/export/sites/spto/about/>

Cook Islands, Fiji, Kiribati, Marshall Islands, New Caledonia,
 Niue, Papua New Guinea, Samoa, Solomon Islands,
 Tahiti, Tonga, Tuvalu, Vanuatu

4 Proposals for Promotion at the Japanese Market
3 Strategy to Media, Travel Industry & Consumer

- ③ Intensive PR of High Quality Silent Ocean Resort Life



Creating frequent visitors

5 Collaboration with JATA

- ① Development of a training system for rearing high level Japanese speaking guides

Croatia will start to establish a new training system
 in Croatia & in Japan with the support of JATA.



5 Collaboration with JATA

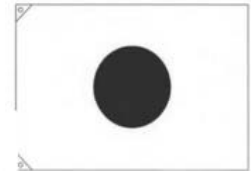
② *Human Resources Development*

Development of a training system in exchange of prospective, competent & powerful men of talent.

③ *Fair Trade Tourism Eliminates Poverty & Creates Peace & Security*

Development of a funding system to the lowest class workers in the tourism industry.

Thank You For Your Kind Attention!



■ 「フィジー観光の最新レポート」

“Fiji Tourism Update”

ファネ・ベイブ フィジー公共事業・交通・民間航空・観光省 観光部長

Ms. Fane Vave, Director of Tourism, Ministry of Public Enterprises, Communications, Civil Aviation and Tourism

Fiji Tourism Update

UNWTO SIS Webinar
22 February 2011
JICA Studio
University of the South Pacific

Overview

- **About Fiji**
 - Location
 - Demographics & Economic sectors
- **Tourism today**
 - Key facts
 - Visitor arrivals
 - Tourism Earnings
 - Hotel rooms count & distribution
- **Tourism tomorrow**
 - WTTC
 - Opportunities
 - Strategies
- **Summary**

About Fiji

About Fiji

- Population of 832, 271 (2007 census)
- Population distribution 51% urban centers & 49% in rural centers
- 71% of population is over 15 years of age
- Currency = FJD
- Official language – English

* Includes National carrier FOREX

Fiji Today

Direct flights

- Sydney
- Melbourne
- Brisbane
- Auckland
- Los Angeles
- Seoul
- Hong Kong
- Honolulu
- Guam
- South Pacific: Vanuatu, Tonga, Samoa, PNG, Kiribati, Cook Islands, Tuvalu, Solomon Islands

Accommodation – room rates

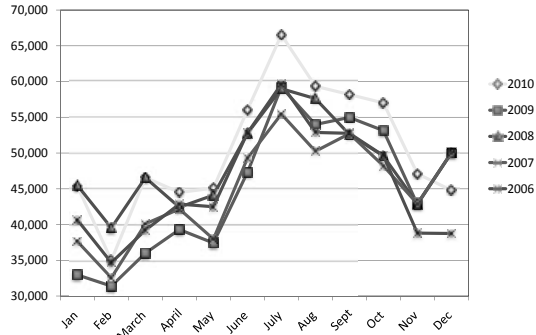
Approx. 9,500 hotel rooms

Source : 2009 Tourism Fiji room inventory survey

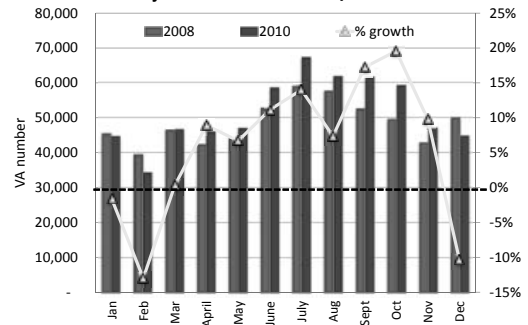
Fiji Today

% share of 2010 total visitor arrivals

Fiji Today - Seasonality



Fiji Visitor Arrivals 2010/2008



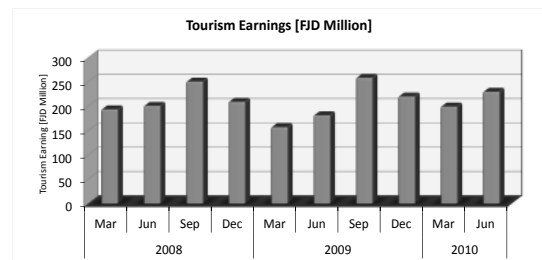
Fiji Today & Tomorrow



INDICATOR	2010	2020 FORECAST
GDP contribution	30.9%	45.2%
Real GDP growth	-1.3%	7.2%
Contribution to employment	28.6%	42.3%
% of total Export earnings from travel/tourism	36.2%	38.8%
% of total investment from travel/tourism	40.9%	46.4%

Source : WTTC Fiji Travel and Tourism Economic Impact Report 2010

Tourism Earnings



Source :Fiji Islands Bureau of statistics

Opportunities

- Data**
 - Collection, consolidation and harmonization
- Legislation, enforcement & monitoring**
 - Product development
- Limited resources**
 - Maximize investment and Return on Investment
 - Data based decisions
 - Priorities and national budget
- Globalization & internet**
 - New markets
 - Communication channels
- Competition**
 - Destination marketing & differentiation
 - Global market

Strategies

- Policy and Planning**
 - Data based decisions
 - Regular review and updating of plans
 - Fiji Tourism Master plan
 - Product development, monitoring and strategy
- Increase return on investment**
 - Volume and yield
 - Revenue
- Destination marketing**
 - Expansionary approach for new markets
 - Consolidation of traditional markets
 - Seasonality
 - Market segmentation

Summary:

- Fiji Tourism growth forecasts remain strong
 - Sustaining growth in globally competitive market is the challenge
- Challenges /Opportunities will continue
 - Minimize risk
 - Maximize opportunities
- Fiji is strategically positioning itself for the future
 - through the review of the Fiji Tourism Master plan
 - Improved data collection to ensure data based decisions
 - Strategic marketing review of Tourism Fiji

Vinaka

for more information contact
dotfiji@gmail.com



■ 「バヌアツ現状報告」

“Vanuatu Status Report”



ジャスティン・ジョンソン 観光マーケティング開発ファンド会長

Mr. Justin Johnson, Chairman for the Tourism Marketing Development Fund (TMDF)

Vanuatu Status Report


UNWTO Regional Seminar
Tourism Exchange for Small Islands

Vanuatu SW Pacific – 83 Pristine Islands





- ▶ 83 Pristine Islands
- ▶ 3,500 nautical miles from Japan (Fiji, Brisbane = 3,800nm)


Vanuatu – Fast Facts



- ▶ Population – 221,417
- ▶ Timezone - UTC+11
- ▶ Languages – English, French, Bislama, +120 traditional languages
- ▶ Demographics – 99% indigenous Melanesian, balance European, Asian, Other Pacific Islander
- ▶ Tourism is 40% of GDP
- ▶ 6000 jobs in formal/informal employment
- ▶ 75% of foreign exchange earnings






Key Features of the Tourism Product



- ▶ Pristine underwater and natural environments
- ▶ Authentic living indigenous culture
- ▶ Intact tribal communities
- ▶ World class scuba diving locations
- ▶ Accessible active volcanoes
- ▶ Friendly and welcoming indigenous people
- ▶ Multi – cultural fusion – Melanesian/French/British
- ▶ Untouched remote islands and conservation areas
- ▶ Peaceful lifestyles, political stability
- ▶ Unique native crafts and music
- ▶ Year round warm climate



World Class Diving

- ▶ SS General Coolidge, Espiritu Santo
- ▶ Reef, wreck diving throughout the country

Unique Attractions of Natural Beauty

- ▶ Mt Yasur, Tanna Is, an accessible active volcano
- ▶ Several other active volcanoes

Friendly, relaxed, welcoming lifestyle



- ▶ "Happiest country in the world (Happy Planet Index 2008)
- ▶ "#6 of the "Top Ten Countries to Visit in 2011" (Lonely Planet, 2010)



DISCOVER *Vanuatu*
WHAT MATTERS

Port Vila, Vibrant Culinary Capital



DISCOVER *Vanuatu*
WHAT MATTERS

Unique Culture and Customs



- ▶ Culturally diverse, with 113 different languages.

DISCOVER *Vanuatu*
WHAT MATTERS

Extensive Cultural Tourism/Eco Tourism



Nagol Land Diving

Soft Adventure

Roi Mata UNESCO
Heritage Listed site

DISCOVER *Vanuatu*
WHAT MATTERS

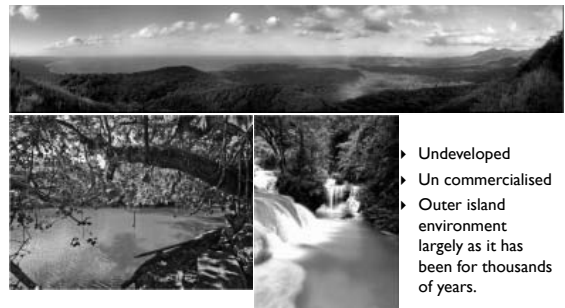
Extensive Marine Based Soft Adventure



- ▶ Diving, snorkelling, swimming, fishing, sailing, canoeing.....
- ▶ Several designated marine conservation zones
- ▶ Management of marine resources an ongoing issue.

DISCOVER *Vanuatu*
WHAT MATTERS

Untouched Natural Environment



- ▶ Undeveloped
- ▶ Un commercialised
- ▶ Outer island environment largely as it has been for thousands of years.

DISCOVER *Vanuatu*
WHAT MATTERS

Unique Flora and Fauna

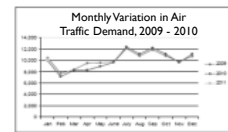
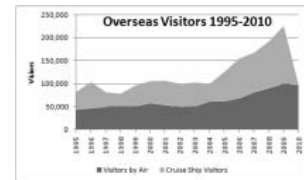


- ▶ More than 1500 species of plants shrubs and trees.

DISCOVER *Vanuatu*
WHAT MATTERS

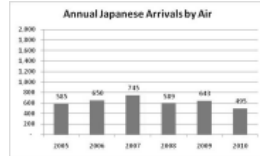
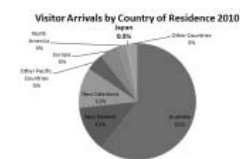
Tourism Statistics - Overview

- ▶ Low volume like many small island states
- ▶ High growth in air traffic since introduction of competition in 2004
- ▶ Rapid growth in cruise ship visitation since 2005
- ▶ Australia and New Zealand primary source markets due to proximity
- ▶ Peak season mid year (southern winter) – low occupancy in northern winter.



DISCOVER *Vanuatu*
WHAT MATTERS

Tourism Statistics – Japanese/Asia Visitors



- ▶ Very low demand from Japan and Asia generally
- ▶ Issues are:
 - ▶ Lack of direct access
 - ▶ Lack of awareness of Vanuatu in source markets
 - ▶ Need for strong outbound operator support
 - ▶ Need for Asia-knowledgeable inbound operators
 - ▶ Lack of Asia-friendly product development



DISCOVER *Vanuatu*
WHAT MATTERS

Japan/Asia Market Development - Issues



- ▶ Access
- ▶ Market Development
- ▶ Product Readiness
 - ▶ Hospitality Standards
 - ▶ Marine Based Tourism
 - ▶ Beach Resort Experience
 - ▶ Cultural Tourism
- ▶ Human Resources
- ▶ Risk Management

DISCOVER *Vanuatu*
WHAT MATTERS

Addressing Access and Market Development



- ▶ All Asian visitors must come through intermediate points
- ▶ Poor connections, complicated fares, ticketing and visa issues on transit
- ▶ Airlines will not fly direct until the market is further developed
- ▶ Future focus is on building traffic through strategic Pacific hubs:
 - ▶ Fiji, New Caledonia are target hubs
 - ▶ Strategic relationship with long haul airlines like Air Pacific, Air Calin, Korean Air
 - ▶ Joint market development proposed with airlines and other Pacific states

DISCOVER *Vanuatu*
WHAT MATTERS

Product Readiness – Hospitality Standards



- ▶ High End – Approx 600 rooms
- ▶ Mid Range – Approx 400 rooms
- ▶ Budget – Approx 400 rooms
- ▶ No accreditation system, although preparation in progress
- ▶ Top end mainly overseas owned and managed, mostly 2-4 star
- ▶ Budget includes locally run basic standard outer island bungalows
- ▶ Budget standard requires much development to meet international tourism
- ▶ Environmental standards not strongly enforced
- ▶ Weak planning framework – exploring concept of Tourism Development Zones

DISCOVER *Vanuatu*
WHAT MATTERS

Product Readiness – Eco/Cultural tourism



- ▶ Vanuatu is strongly engaged in ecotourism and growing cultural tourism
- ▶ Relatively weak environmental management, and planning controls
- ▶ Some pressures of numbers on major cultural tourism events, like the Nagol, land diving.
- ▶ Duty of care, visitor safety factors depend on individual operator initiative

DISCOVER Vanuatu
WHAT MATTERS

Product Readiness – Marine Based Tourism



- ▶ Extensive marine based activities
 - ▶ Increasing marine conservation zones
- However:
- ▶ Marine environmental management an issue, particularly near urban areas
 - ▶ Beach front alienation by residential and commercial development on main tourism centres of Vila and Santo
 - ▶ Beachfront land ownership issues constrain tourism product development

DISCOVER Vanuatu
WHAT MATTERS

Human Resources

- ▶ Training and education delivered by a number of different institutions:
 - ▶ Vanuatu Institute of Technology – 1- year certificate course in hospitality with dedicated Tourism & Hospitality Training Centre
 - ▶ Australia-Pacific Technical College (APTC) delivering internationally accredited Certificate II and III in Tourism and Hospitality.
 - ▶ University of South Pacific Tourism Management
 - ▶ On job training and short courses
- ▶ Occasional Japanese language training by JICA volunteers
- ▶ Little or no exposure to Asian service expectations

DISCOVER Vanuatu
WHAT MATTERS

Disaster Risk Management

- ▶ Vanuatu is exposed to cyclones, earthquakes, tsunamis, volcanic eruptions
- ▶ Health system is vulnerable
- ▶ Disaster management frameworks are in place, and within the limited resources function well.
- ▶ Extensive international agency assistance in capacity development
- ▶ Quick response to disease threats
- ▶ Tourism industry has sound response systems in place but these can be improved.

DISCOVER Vanuatu
WHAT MATTERS

Addressing the Challenges

- ▶ Tourism Summit December 2008
- ▶ The Vanuatu Tourism Action Program (VTAP)
- ▶ National Cruise Ship Strategy May 2010
- ▶ National Yacht Strategy November 2010
- ▶ Planning the establishment of a National Tourism Council with an Executive body responsible for implementing the VTAP
- ▶ Provincial Tourism Councils planned in same context

DISCOVER Vanuatu
WHAT MATTERS

The Vanuatu Tourism Action Program:

- ▶ Institutions and Partnerships
 - ▶ Improve policy coordination and capacity in tourism planning
 - ▶ Establish Tourism Council and executing agency
 - ▶ Prepare tourism development plans with environmental and social strategies
- ▶ Marketing the Destination
 - ▶ Implement long term destination marketing plan
- ▶ Investment and Product Development
 - ▶ Tourism development planning and zoning
 - ▶ Promote eco friendly investment in planned development zones

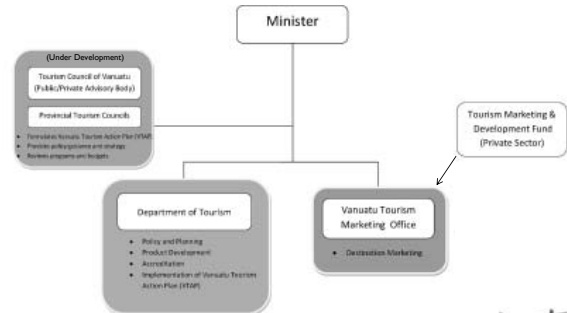
DISCOVER Vanuatu
WHAT MATTERS

Vanuatu Tourism Action Program (cont)

- ▶ Access and Infrastructure
 - ▶ Develop and implement an international air access strategy
 - ▶ Infrastructure development coordination with tourism dev't
- ▶ Human Resource Development and Education
 - ▶ Develop a comprehensive HRD Education and Training Strategy including manpower plan/
 - ▶ Develop an industry accreditation scheme

DISCOVER *Vanuatu*
WHAT MATTERS

Management of the Destination



DISCOVER *Vanuatu*
WHAT MATTERS

The Tourism Vision for Vanuatu

- ▶ “Tourism celebrates Vanuatu’s culture and environment, empowers its people and captivates its visitors throughout its islands”

Vanuatu Tourism Summit, 2008

DISCOVER *Vanuatu*
WHAT MATTERS

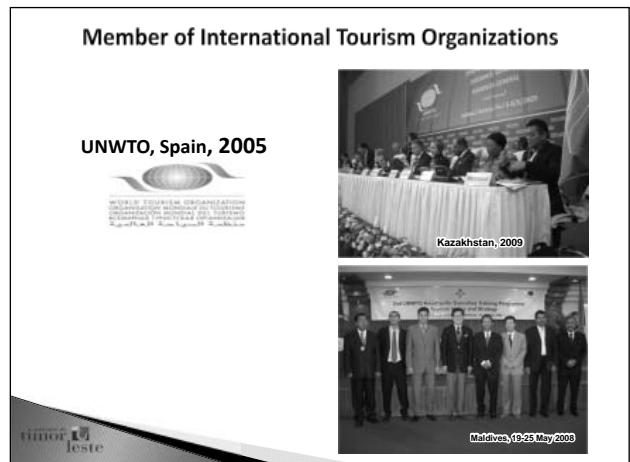
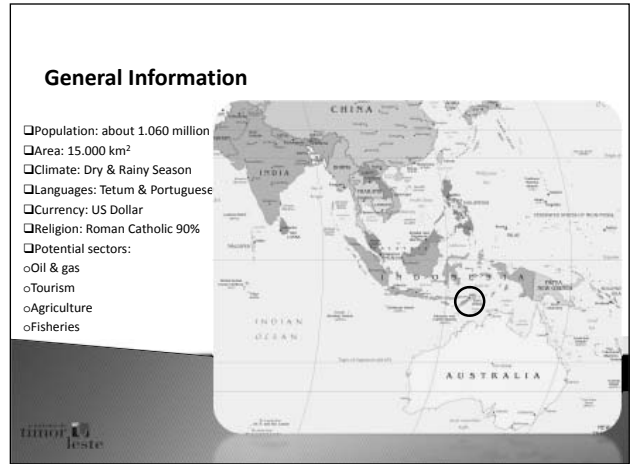
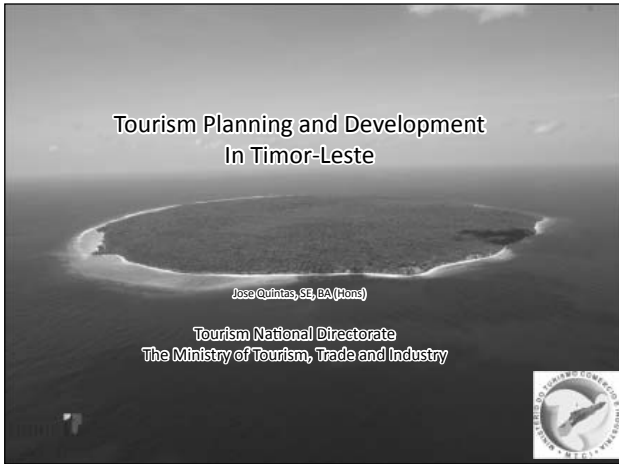


■ 「東ティモールの観光計画と観光開発」

“Tourism Planning and Development in Timor-Leste”

ジョゼ・キンタス 東ティモール観光経済省 国家観光部長

Mr. Jose Quintas, Tourism National Director, Ministry of Tourism, Trade and Industry



PATA, Bangkok, 2003



Constraints to Tourism Development

- Accessibility
- Competitiveness
- Land Issue
- Weak Institutional System
- Lack of Infrastructure and Accommodation
- Lack of Qualification Human Resources at all Levels
- Lack of Tourism & Environmental Awareness

Policies For Tourism Development

- HRD;
- Improving Infrastructure and Accommodation;
- Marketing & Promotion (tourists& investors);
- Community-Based Tourism;
- Eco-tourism;
- Tourism Awareness Campaign.

Eco-tourism Development in Timor-Leste



Atauro Island Eco-lodge



Tutuuala Eco-tourism

Community-Based Tourism



Maubesse, Ainaro



Com, Lautem



Maubara, Liquica



Maubara, Liquica

Capacity Building Programs

- Dili Institute of Technology
- East Timor Development Agency
- Baucau Training Centre
- Venilale Professional School
- NIKKI International Hotel School





■ 「島嶼国のサステナブル・ツーリズム」

“Sustainable Tourism Development in Small Island ”

アリー・スハンディ インドネシア・エコツーリズム・ネットワーク (Indecon) 部長

Mr. Ary Senjaya Suhandi, Executive Director Indonesian Ecotourism Network (Indecon)

Sustainable Tourism Development in Small Island Case of Indonesia

By: Ary S. Suhandi

INDONESIA

AT A GLANCE

More than **300** distinct native ethnicities
742 different languages and dialects

Indonesia is the largest archipelago and the fourth most populous country in the world (± 237 million people)

Extending 5,120 km from east to west and 1,760 km from north to south.

More than **17,100** islands Only **6,000** is inhabited

1.9 million km² of land : **3.1** million km² of water/sea

INDONESIA

MEGA BIODIVERSITY: Terrestrial

16% of the world's reptiles and amphibians

35 primate species, 25% endemic

17% of the world's birds, 26% endemic

Forest Diversity

About 59% of terrestrial areas in Indonesia are tropical forest or 10% from the total forest area in the world (Stone, 1994).

There are about **110 million Ha** of the total Indonesia's forest classified as preserved forest which **18.7 million Ha** are conservation area, including:

- 51 National Park
- Nature Recreation Park
- Nature Reserve
- Protected Forest

121 butterflies species, 44% endemic

12% of the world's mammals, 36% endemic

Moreover, the percentage of endemic flora in Papua reaches 60-70%

INDONESIA

MEGA BIODIVERSITY: Marine

Indonesia has approximately **50.875 km²** of coral reefs. If this conservative estimate is accurate, it means that **51%** of the South East Asia region's coral reefs and **18%** (284.300 km²) of the world's coral reefs are found in Indonesian waters.

-World Resources Institute

This abundance of coral reefs is not only contributed to biodiversity, but also to science and economic development in Indonesia and the world

CHALLENGE FOR SMALL ISLAND

Vulnerable to Species Loss

Small island is particularly vulnerable to species loss or its adaptation. Once any species become extinct, it is very difficult to re-introduce it.

Banggal cardinalfish (Pterapogon kauderni)

Limited Resources

Small island has limited resources especially for development, thus requires efficiency. Many small islands also lack main infrastructure and public services; for example transportation and clean water supply.

CHALLENGE FOR SMALL ISLAND

Limited Space

Space is an essential consideration for development in small islands; especially if the islands are not closely located to other islands. The islands have to be self sufficient or able to fulfill its own needs (to some extent)

Open Access

Small islands have open access, which give extra challenge for its natural and marine protection. It makes more difficult to surveillance exploitation activities or destructive tourism activities.

TOURISM AND SMALL ISLAND DEVELOPMENT

Interdependence between tourism development and nature conservation in small island

(Ir)responsible tourism development and activities often creates adverse impact on natural and cultural environment



Unorganized street vendors on the beach



Stepping on the corals

TOURISM AND SMALL ISLAND DEVELOPMENT

Species loss and damaged environment will decrease the quality and attractiveness of attractions; thus reducing number of visits



Thailand closes dive sites to halt damage to reefs

"Thailand is closing dozens of dive sites to tourists after unusually warm seas caused severe damage to coral reefs in the Andaman Sea, one of the world's top diving and beach resort regions..." – Jakarta Post, Jan 21, 2011

Andrew C. Baker/Wildlife Conservation Society

ISSUES NEED TO BE ADDRESSED

(Indonesia Context)

Policy issues

At the moment, we have **Guideline for Tourism Development in Small Island**, 2004, by Ministry of Culture and Tourism; which comprises of Principles, Considerations, and Guidance.

It emphasizes its guidance on:

- spatial planning
- carrying capacity
- Infrastructure and facilities development
- environmental management
- community participation
- management

This guideline still needs technical follow up. It is required to develop appropriate **Standard** for tourism services, facilities, and human resources, in small island

ISSUES NEED TO BE ADDRESSED

(Indonesia Context)

Environmental Management Issue

Tourism in small island requires strong destinational management organization (DMO). This organization can uses the collaborative management approach, which involve stakeholders in planning and implementation of tourism development.

DMO should prioritize consider environmental management issue for its work.

Environmental issue related to tourism:

- Destructive fishing methods (bom & cyanide)
- Increasing sea temperature caused by climate change affect the quality of coral reefs
- Weak environmental awareness from the tourism stakeholders and community

ISSUES NEED TO BE ADDRESSED

(Indonesia Context)

Stakeholder partnership and participation

Challenges of small islands (esp. Open access and limited resources) increase the needs of stakeholder participation towards sustainable tourism development (or any other development) in small islands. Because it is practically impossible to watch over the area; thus participation of local population to support natural protection is indispensable.

Increase the awareness and ownership which will increase the participation of community for protecting natural resources as tourism asset.



ISSUES NEED TO BE ADDRESSED

(Indonesia Context)

Climate change and Tourism

- Climate change presents **threats and opportunities** for tourism
- **Climate change will drive technology** – as tourism paradigm shift, market will prefer innovative products – many successful players use technology to attract customers
- **Demand for action** – the world will expect real action, not only debates about climate change and global warming.
- **Long haul flights and highly consumptive holidays** will be seen not environmentally friendly – **creating demand for regional products**
- The emergence **high efficiency and low energy** consumption products

This creates particular demand and competition among tourism players




Standard & Certification

CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

- Established in 1991
- 90,000 hectares**, consists of **5 islands** and North Sulawesi mainland
- 22 villages** in and around the park, with **30,000 residents**
- Well-developed marine tourism industry – **20 dive operators**
- 26,000 tourists/year**
 - 15,000 local Indonesian guests
 - 11,000 foreign guests




CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

Biodiversity richness:

450 species of reefs 29 species of mangrove 2000 reef fish



Museum for marine endangered species


Sea horse Pygmy (*Hippocampus barbouri*) Dugong (*Dugong-dugong*) Green turtle (*Chelonia mydas*) King fish (*Lutjanus fulviflamma*)

CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

Specific Issues Faced

- Less conservation budget from the government
- Unclear park zoning system.
- No involvement of government in provincial and district level on park management.

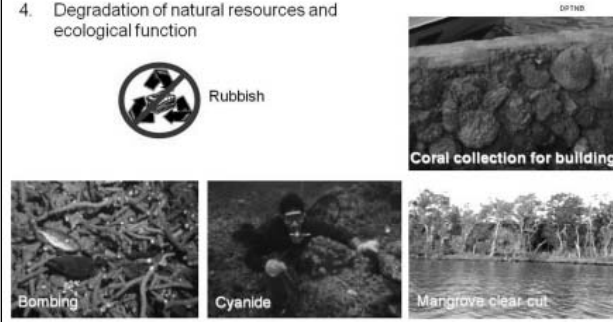


CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

Specific Issues Faced

- Degradation of natural resources and ecological function


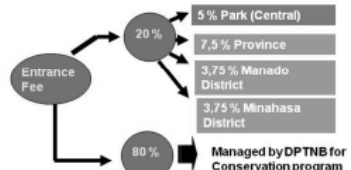


CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

Initiatives (Tourism for Nature Conservation)

- Creation of a multi-stakeholder advisory board
- Inclusion of local communities and private sector in management, particularly enforcement
- Participatory in zoning revision process
- Implementation new initiative on entrance fee system for sustainable conservation financing





CASE STUDY

BUNAKEN NATIONAL PARK in North Sulawesi

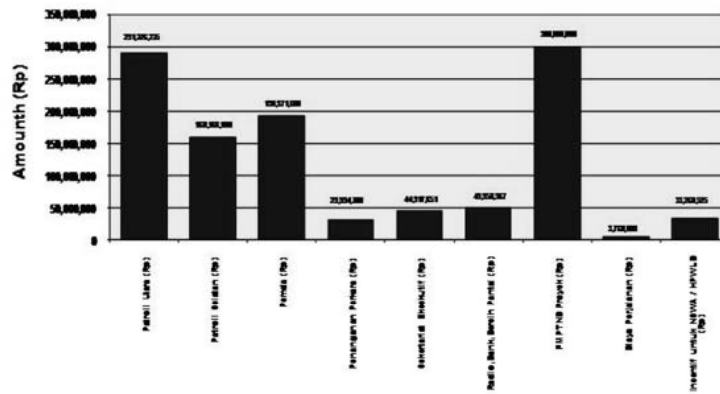
DPTNB Program

- Develop joint villagers and park ranger patrol system.
- Implement of entrance fee policy.
- Develop visitor database system
- Strengthen Bunaken Community Forum (FMPTNB)
- Develop and implement rubbish program.
- Promote sustainable use and strengthen local community enterprise.



BUNAKEN NATIONAL PARK in North Sulawesi

Realizations of entrance fee fund



DATA DPTNB

BUNAKEN NATIONAL PARK in North Sulawesi

Result

1. Within one year, 1.2 billion rupiahs collected from entrance fee.
2. Database system in place.
3. Bombing and cyanide decrease.
4. Illegal fishing of endangered species decrease.
5. Mangrove cutting and coral collecting decrease.

Lesson Learned:

Multiple-use MPA zoning plans are valuable management tools for mitigating conflict among stakeholders and balancing effective conservation with sustainable development (DPTNB)

■ 「バリ」

“BALI”

イ・マデ・スアルナタ ヤヤサン・ウィスヌ (エコツーリズム団体) 部長

Mr. I Made Suarnatha, Executive Director of Yayasan Wisnu



... keep BALI in balance

- Atma Kerthi – spiritual cosmology
- Wana Krethi – sustainable forest
- Danu Kerthi – sustainable lake
- Segara Kerthi – sustainable ocean
- Jana Kerthi – capable human resources
- Jagat Kerthi – good governance



Some issues of community in Bali villages currently

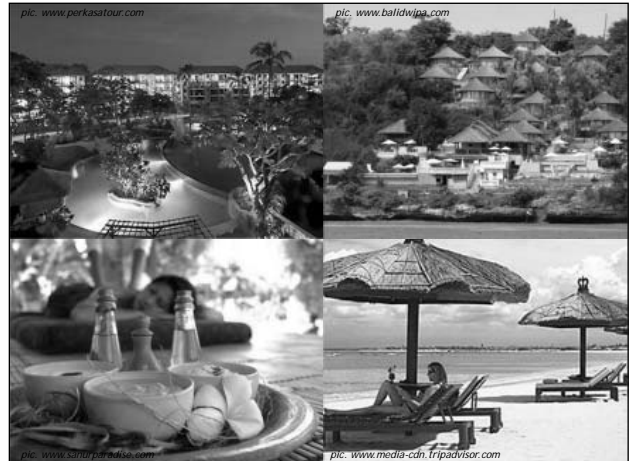
The community feels that the top down approaches marginalized them in terms of decision making on their own village spatial and their resource management plan

...so that bring impact to local economy, environmental and socio-cultural consequences

in the end
the
community
ends up in
the weak
position or
being
victimized



GLOBALISASI



The impact...



**TOURISM IN
BALI**

as tourist destination Bali develop very fast

The Last Paradise 1930-an

Mass tourism 1980's Cultural tourism 1960's

The profit goes back to the origin countries of investment ...the trickle down effect not balance compare to the impact on environment and local socio-culture

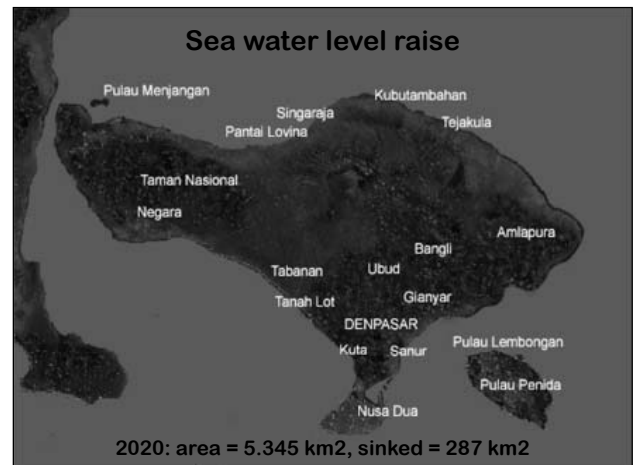
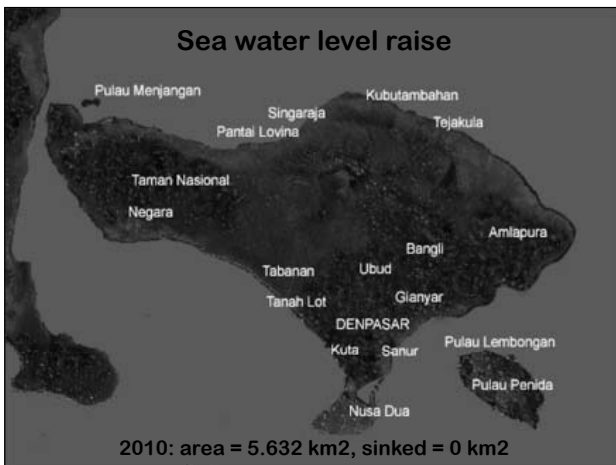
Continuing the pattern of mass tourism without internalizing the cost of negative impact ...

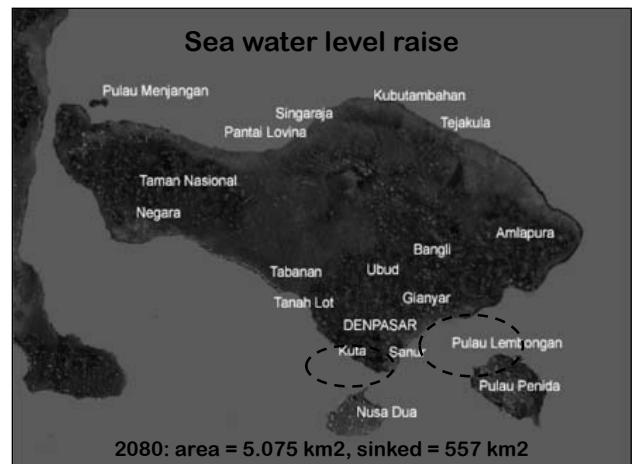
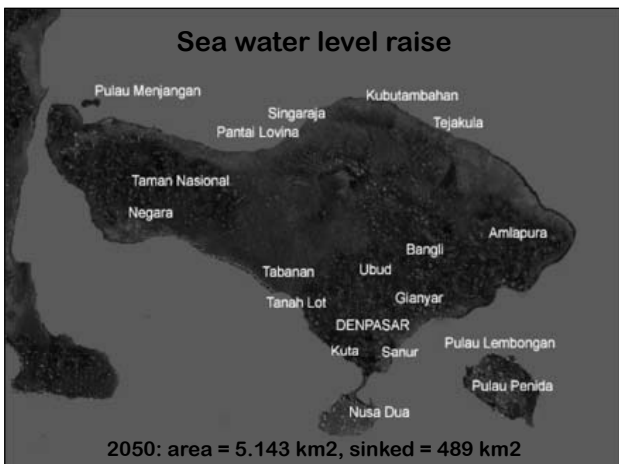
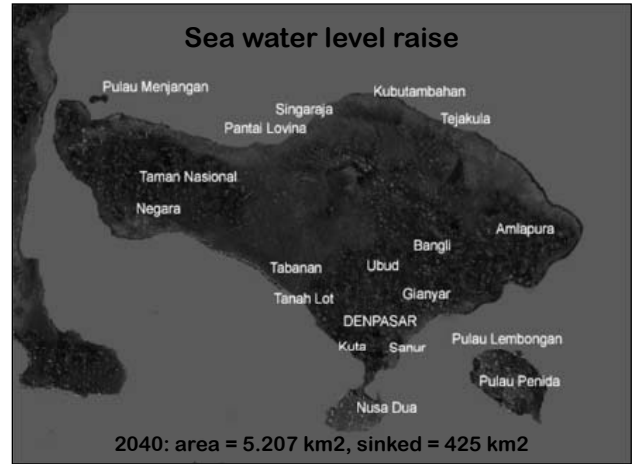
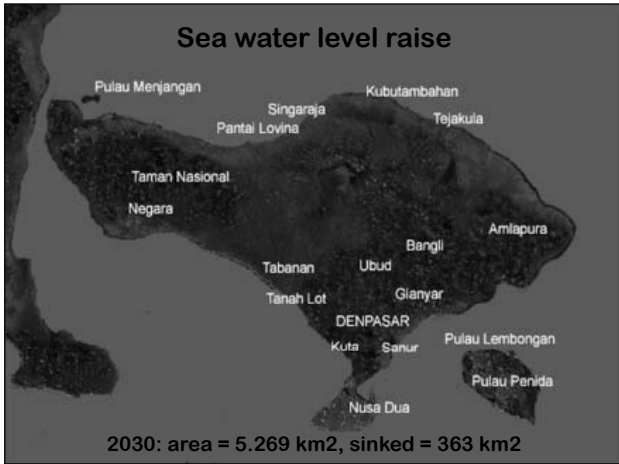
... same as kill the geese that lay the golden eggs

GLOBALIKLIM



Impact on small island of BALI





SO...WHAT TO DO???



The community has to aware about it and start participating in decision making process by develop awareness on their own resources and related global issues






Making participatory planning as realization of their own potential

also doing capacity building activities:

- ✓ ToT of Facilitator
- ✓ Training on Community Organizing
- ✓ Training on Book keeping and Accountability
- ✓ Training on PRA, participatory mapping and PAR
- ✓ Strategic Planning



Training on eco-tourism:

- Eco-tourism concept
- Local guides
- Local food and beverages





Eco-tourism packages




Management system In community level



The develop together...



Through a network among villages




Village Eco-tourism Network



In order to restore the balance of Bali

Bali balancing

- Economy
- Culture
- Environment

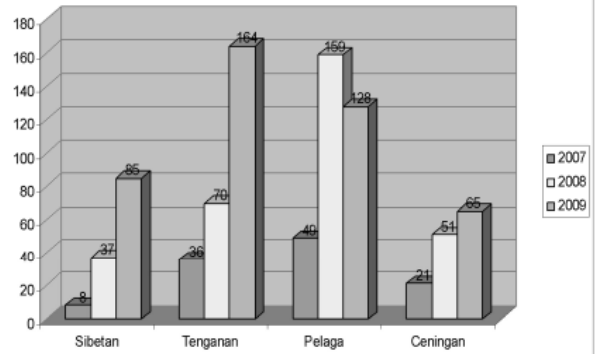


Through village ecotourism which is owned by community and based on their potentials:

- Local guide
- Local and organic culinary
- Village guest houses
- Local way of life



Jumlah Kunjungan Tamu Tiga Tahun Terakhir Kemasing - masing Desa

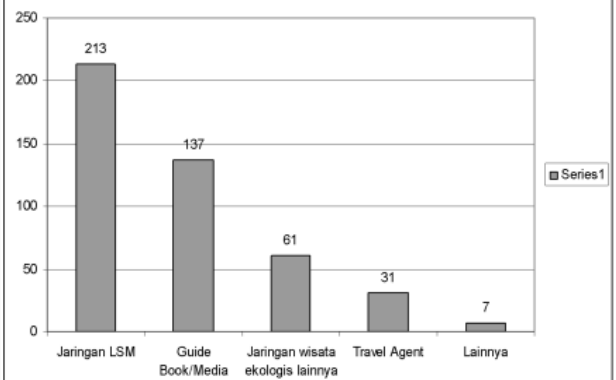


Jumlah Pendapatan Kotor JED tahun 2009

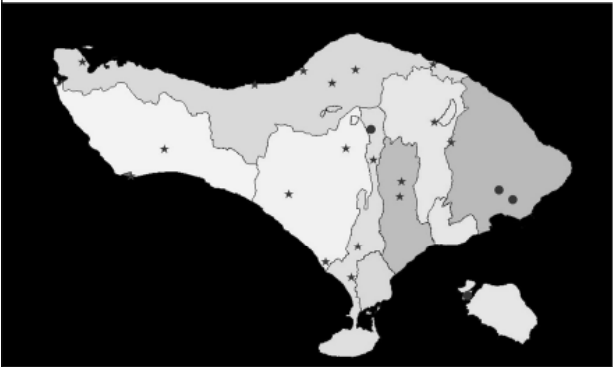


Legend: □ Pendapatan Paket Tour ■ Pendapatan Lain - lain

Sumber Informasi Wisatawan Tentang JED



60 villages out of 1543 villages in Bali are interested in developing Eco-tourism



BALI DWE
The way to real Bali

GOAL 1

To develop community awareness and capacity building on village resource management



GOAL 2

To support and encourage of fairness and sustainable resources management



GOAL 3

To standardize the form of community tourism businesses



GOAL 4

To certify villages that have already fulfilled the standard values of Bali DWE



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■ 「モルジブにおける島の観光開発」

“Island Tourism Development in the Maldives”

アハメド・サリー モルジブ観光芸術文化省 事務次官

Mr. Ahmed Salih, Permanent Secretary, Ministry of Tourism, Arts and Culture

Island Tourism Development in the Maldives
UNWTO Seminar- Tourism Exchange for Small Islands
22-23 Feb 2011

Maldives
..the sunny side of life

Ministry of Tourism, Arts & Culture
Maldives, 22 Feb 2011

Introduction

Maldives Tourism

- A nation of islands
- 1972 – first package tourists arrives
 - Adventurers
 - 200 beds in 2 islands
 - Product - simple, basic and nature based

Tourism Products

Accommodation Type and Bed Capacity in 2010

- Nature based tourism
- 97 Resort Islands: “One Island One Resort”
- Extensive reefs and scuba dive sites

Accommodation Type	Capacity
Resort Islands	21,322
Hotels	1,449
Guest Houses	476
Vessels	2,434
Marinas	90

Purpose of Visit

Main Purpose of Visit by Percent of Visitors 2008

- 32% of visitors undertook diving (2008)
- 20% undertook water sports

Purpose of Visit	Percentage
Relaxation	55%
Honeymoon	28%
Diving	11%
Business	3%
Others	2%

Major Markets & Japan 2010

- Europe ~67.3%
- Asia Pacific ~27%
- Americas ~2.8%
- Middle East ~1.2%
- Africa ~1.0%

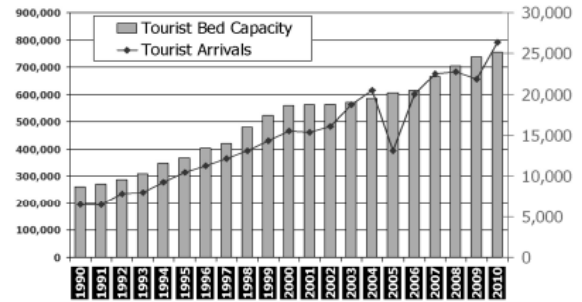
Country	Number of Visitors
China	118,961
UK	114,158
Italy	89,596
Germany	77,108
France	54,789
Russia	49,111
Japan	38,791
Switzerland	27,756

Tourism Benefits

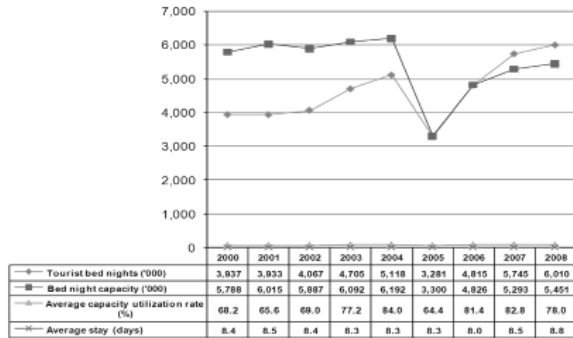
- **Sustainable Development**
 - Foreign exchange revenue for the nation
 - A sustainable source of income and employment for the people
 - Improved social standards
 - Opportunity for protection and conservation of Maldivian natural and cultural heritage
- **Destination's image and international recognition**



Tourist Arrivals & Bed Capacity



Tourist bednights



Tourism Development Policies & Strategies

Vision

- **Maldives to be the best example of sustainable tourism development –**
 - A nation with an economically profitable tourism industry
 - In harmony with its natural environment
 - Cultural resources
 - Values of people



Development Strategy

- Promote steady Growth
- Facilitate investment
- Promote government & private sector Cooperation
- Spatial Development
- Diversify markets & product to remain competitive
- Regulation of Industry



Planning Tools

- **Strategic Action Plan**
- **Tourism Master Plans**
 - First Tourism Master Plan (10 year) 1984-1995
 - Second Tourism Master Plan (10 year) 1996 – 2005
 - Third Tourism Master Plan 1997-2011 – under review



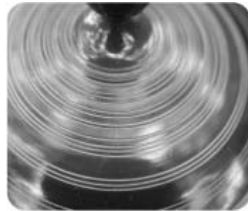
Tourism – Current Challenges

- **Local investment finance constrains**
- **Labour supply for the job market**
- **Economic leakages**
- **Climate change and geographic challenge**
- **Harmonizing development and environment (reducing the environment footprint)**



Strategic Approach

- **Improve environmental performance**
- **Facilitate employment through training**
 - Establish Training Resorts – to develop HR
- **Development of appropriate Standards & Regulations**



Strategic Approach

- **Improve transport and access**
 - Investments in airports
 - Investment in transport network
- **Tax reform**
- **Increase public share in tourism**
- **Public private partnerships**
- **Direct Foreign Investments facilitation**



Thank you



Ministry of Tourism, Arts & Culture
Maldives, 22 Feb 2011

■ 「IFC／観光と太平洋島嶼国 挑戦と機会」

“IFC, Tourism & the Pacific Islands Challenges & Opportunities”

シャウン・マン 世界銀行グループ 観光投資政策官

Mr. Shaun Mann, Senior Tourism Investment Policy Officer, The World Bank Group





IFC, TOURISM & THE PACIFIC ISLANDS

CHALLENGES & OPPORTUNITIES

*Shaun Mann, Senior Tourism Investment Policy Officer
International Finance Corporation
February 2011*

IFC: Private Sector Arm of World Bank Group

- Owned by 182 countries
- World's largest multilateral private sector investor in emerging markets
- Portfolio about \$24 billion (hotels 2-3%)
- AAA rating
- 2,600+ staff in 80 offices worldwide
- In-house syndications department working with over 200 banks
- Advice on environmental and social issues, corporate governance, other Advisory Services
- Political risk mitigation

IFC: What's our role in tourism?

Private Sector Investment

- Over \$2.5 billion since 1956 - 235 projects in 83 countries
- Current portfolio: \$574 million, 58 projects, 36 countries

Advisory Services to Governments and Private Sector Clients

- Tourism sector growth strategies, policies, standards & regulation
- Tourism investment generation & investment climate reform
- SME growth and linkages



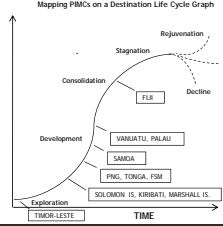

IFC, Tourism and the Pacific

IFC has been involved with the tourism sector in Pacific Island member countries (PIMCs) for over 20 years.

- Following the first hotel investment in the region in 1985, IFC managed a 'project development facility' between 1990 and 2004 which supported 56 tourism enterprises and resulted in three more direct hotel investments. Since then, our tourism work has focused on providing (non-investment linked) advisory services to governments, intermediaries and the private sector. The most recent activity has been in undertaking tourism sector diagnostic assessments for client governments to, the identification of tourism investment impediments.

What have we learned?

- There are differences across the region!!!!
- Scale is THE major challenge for PIMCs. For most PIMCs there is not enough tourism product to overcome the high cost of traveling there.
- There is not enough government prioritization for the tourism sector.
- We can learn from Fiji: Fiji accounts for over 60% of inbound tourism traffic to the South Pacific





... Lessons learned about the Pacific Tourism Sector cont'd

- PIMCs face a range constraints to sustainable growth of their tourism sector. Although the nature of these varies across countries, they typically reflect common impediment themes at country, sector and firm level.

Figure 3: Key constraints to sustainable development of the tourism sector in PIMCs

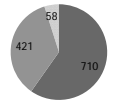
Level	Constraints
MACRO Region or Country-level	<ul style="list-style-type: none"> Inadequate transport infrastructure and services (esp. aviation). Inadequate and costly ICT and utilities infrastructure. General investment climate constraints around the ease of doing business. Land tenure systems Weak environmental & cultural heritage protection legislation and enforcement of it.
MESO Tourism Sector-Specific	<ul style="list-style-type: none"> Tourism-specific doing business constraints (eg. investment approvals, licensing). Inadequate legislative and regulatory framework for tourism sector development. Limited tourism planning and investment promotion capacity. Lack of data on the tourism industry (supply/demand data & economic measures). Weak whole of government responsibility for tourism. Limited supply of quality tourism products and services (accommodation and tour businesses to meet market demand). Limited human resource capacity across institutions and business operations. Limited marketing resources and skills. Limited public and private sector cooperation in tourism sector development. Limited engagement of wider community in tourism development opportunities.
MICRO Firm-Level	<ul style="list-style-type: none"> Lack of equity capital and/or land title to secure loan finance. Limited experience in project development and financing (especially for SMEs). Limited access to suitably skilled labor for investments.



... lessons learned about the Pacific Tourism Sector cont'd

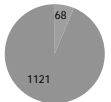
- The nature of tourism investments in the Pacific is unique.
 - There are approximately 1200 accommodation providers across PIMCs: 95% of those are SMEs (<100 rooms).
 - Previously considered 'too small' for IFC, most tourism investment opportunities in the region are for SME hotels valued at between US\$2m & US\$10m. Leads for hotel investments above that are very rare.
 - Just 6% of PIMC hotels are considered - in the absence of a formal rating system - to be of 4/5 star quality.
 - Most PIMC accommodation is independently run: just 4.5% of properties are international or regional/local brands.
 - Fiji dominates in terms of size, quality and brand presence representing more than half of the total number of large properties (>100 rooms), 60% of the 4 to 5 star hotels, and 18 of the 23 international brand hotels.
 - Within other PIMCs, there are only 5 international brand hotels across 3 countries. And, although there are 6 regional or local brands/chains representing 22 properties, only 2 of those names are not isolated to one country.
 - With a few exceptions, PIMC hotel investments predominantly service the leisure market which represents 46% of arrivals compared to business at 26% & other (those visiting friends/relatives or part of a foreign mission) at 28%.
 - 35% of PIMC accommodation investments are in gateway centres.

PIMC accommodation by size (2009)




Small (<20 room) properties (60%)
Medium-sized (20-100 room) properties (35%)
Large (>100 room) properties (5%)
Based on total property calculation of 1,189 (2009)

PIMC accommodation by standard (2009)



4/5 star quality (6%)
Based on IFC research. No official data available.
Distribution of 4/5 star properties:
Fiji: 41
Vanuatu: 12
Samoa: 5
Solomon: 3
Others: 7



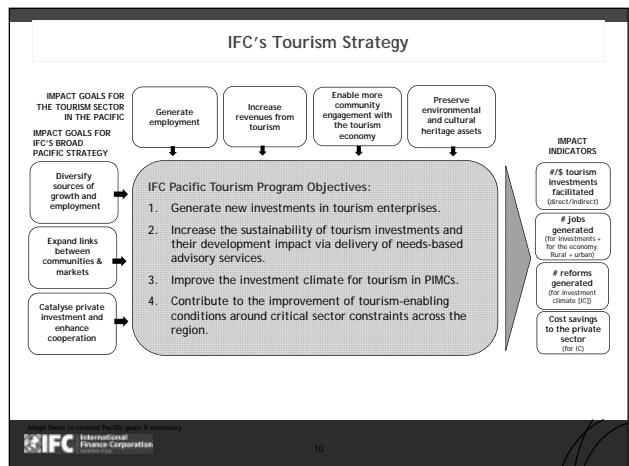
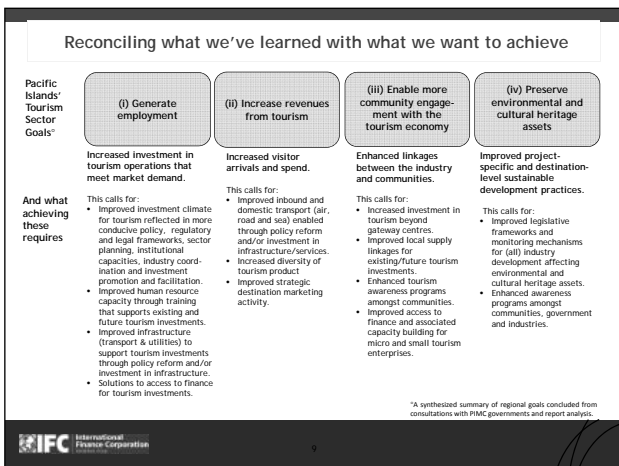
PIMC Tourism Investment Data

IFC MEMBER COUNTRY	Visitor Arrivals (2008)*	Business & Leisure Travelers	# Accommodation Providers / Rooms	Average Rooms per Property	# Properties > 100 rooms	# International / Regional Brands	# 4/5 star Properties	Foreign vs Local Hotel Investment	# Tour Operator Businesses
Fiji	582,602 ¹	B: 7.8% L: 7.8%	336 providers 9,455 rooms ²	28	33 ¹	Intl: 18 Reg: 4	41 ¹	F: 35% D: 65%	35 ¹
Vanuatu	90,654 ¹	B: 11% L: 7.9%	91 providers 1,524 rooms ²	17	2 ¹	Intl: 2 Reg: 1	12 ¹	F: 57% D: 43%	53 ¹
Samoa	121,578 ¹	B: 7.1% L: 1.3%	82 providers 1,264 rooms ²	15	2 ¹	Intl: 0 Reg: 2	5 ¹	F: 20% D: 80%	21 ¹
PNG	114,182 ¹	B: 47.5% L: 26.7%	262 providers 5,540 rooms ²	21	7 ¹	Intl: 2 Reg: 5	2 ¹	F: 15% D: 85%	66 ¹
Palau	83,114 ¹	B: 8.5% L: 9.1%	47 providers 1,356 rooms ²	28	4 ¹	Intl: 1 Reg: 3	3 ¹	F: 15% D: 85%	38 ¹
Tonga	49,400 ¹	B: 8.3% L: 40.9%	92 providers 942 rooms ²	10	1 ¹	N/A	0 ¹	F: 34% D: 66%	41 ¹
Timor-Leste	53,688 ¹	B: N/A L: 100%	128 providers 1,971 rooms ²	15	1 ¹	N/A	0 ¹	F: 10% D: 90%	19 ¹
FSM	21,148 (87) ¹	B: 25.2% L: 70.8%	49 providers 816 rooms ²	17	0 ¹	Intl: 0 Reg: 1	2 ¹	F: 24% D: 76%	26 ¹
Solomon Islands	16,264 ¹	B: 42.4% L: 34.9%	62 providers 912 rooms ²	15	1 ¹	Intl: 0 Reg: 2	1 ¹	F: 18% D: 82%	22 ¹
Marshall Islands	4,022 ¹	B: 33.4% L: 29.7%	16 providers 375 rooms ²	23	1 ¹	N/A	1 ¹	F: 6% D: 94%	35 ¹
Kiribati	3,871 ¹	B: 48.8% L: 10.2%	26 providers 251 rooms ²	10	0 ¹	N/A	0 ¹	F: 0% D: 100%	7 ¹
REGIONAL TOTALS OR AVERAGES	1.14 mn	Average: B: 24% L: 46%	Providers: 1189 Rooms: 24,314	20	52	Intl: 23 Reg: 26	Total: 68	F: 21% D: 79%	363

*South Pacific Travel; ¹National Tourism Office/Gov't resources (eg. reports/websites); ²IFC research. ³Thematic: Includes Whiteboard Report (opening 2018).

... Lessons learned about the Pacific Tourism Sector cont'd

- The predominant SME tourism operator in the Pacific has common traits and needs.
 - Most tourism SMEs are family owned and run accommodation businesses ranging from beach fale, burees or bungalows of less than 20 rooms to hotels, resorts or lodges of up to 100 rooms.
 - SME accommodation providers seek capital for expansion, upgrading, repositioning and refurbishment. While this is available for the more established businesses, many SMEs face barriers to securing local bank financing based on lack of equity, land security and/or project proposal skills.
 - Similarly tour operators (of which there are approx 350 in PIMCs) face barriers accessing finance for their business.
 - A large number of SME firms require a degree of "handholding" in project preparation to become investment-ready, but a lack of suitable project development support services has stifled the expansion of investment opportunities.
 - SME tourism businesses typically also need performance improvement advice that is specific to the tourism sector, eg. financial controls, yield management, distribution systems, energy efficiency, food and beverage cost control, etc. to be sustainable and competitive.
- The nature of the Pacific finance market influences tourism investment opportunities.
 - In most PIMC countries, Australian banks with high liquidity dominate the market and it can be difficult for local banks to compete, thereby preventing many from increasing their tourism portfolios.
 - Debt is readily available for the larger, well-established hotel investors.
 - In principle, the financial institutions would lend to tourism SMEs but few proceed due to the lack of equity and land security, as well as poorly constructed business plans and project proposals.
 - Most bank loans are short term (<3 years), but longer terms loans (8-10 years) are available for good credit.
 - There is a consistent shortage of risk capital across the region which deters local banks from doing more lending.



Context: Tourism is Important to the Pacific

IFC MEMBER COUNTRY	Visitor Arrivals (2008)	Visitor Arrivals (2008)	Travel Industry (Direct) Estimated Annual Economic Contribution			Travel and Tourism Economy (Direct & Indirect) Estimated Annual Economic Contribution				
			Receipts (USD)	% GDP	# Jobs	Receipts (USD)	% Exports Earnings	% GDP	# Jobs	Jobs as % of Labor Force
Fiji	294,000 ¹	582,602 ¹	316.5mn (09) ²	8.9% (09) ²	33,000 (09) ²	911.9mn (09) ²	36.4% (09) ²	25.4% (09) ²	91,000 (09) ²	23.5% (09) ²
Vanuatu	58,000 ¹	90,654 ¹	81mn (09) ²	14.3% (09) ²	8,100 (09) ²	212.8mn (09) ²	64.7% (09) ²	37.5% (09) ²	21,000 (09) ²	33.6% (09) ²
Samoa	88,000 ¹	121,578 ¹	114.3mn (08) ¹	20% (09) ¹	2,018 (08) ¹	N/A	N/A	30% (09) ¹	5,400 (08) ¹	N/A
PNG	58,000 ¹	114,182 ¹	66.5mn (09) ²	0.9% (09) ²	20,000 (09) ²	350.5mn (09) ²	3.5% (09) ²	5% (09) ²	104,000(09) ²	4.1% (09) ²
Palau	58,000 ¹	83,114 ¹	97mn (05) ²	65% (05) ²	1,720 ²	N/A	N/A	72.4% (04) ²	N/A	N/A
Tonga	35,000 ¹	49,400 ¹	14.2mn (09) ²	4.4% (09) ²	1,300 (09) ²	29.1mn (09) ²	42.4% (09) ²	12.2% (09) ²	3,000 (09) ²	10.5% (09) ²
Timor-Leste	N/A (30K in 05) ¹	53,688 ¹	N/A	N/A	1,638 (06) ¹	N/A	N/A	N/A	N/A	N/A
Fed. States Micronesia	21,000 ¹	N/A (21K in 05) ¹	17mn (05) ²	7.3% ²	834 (07) ¹	N/A	N/A	7.3% (05) ²	N/A	N/A
Solomon Islands	5,197 ¹	16,264 ¹	14mn (09) ²	2.1% (09) ²	3,100 (09) ²	48.7mn(09) ²	5.9% (09) ²	7.4% (09) ²	11,000 (09) ²	6.1% (09) ²
Marshall Islands	5,000 ¹	4,022 ¹	4mn (00) ¹	N/A	259 (06) ¹	N/A	N/A	3.2% (02) ¹	N/A	N/A
Kiribati	5,000 ¹	3,871 ¹	1.9mn (09) ²	2.8% (09) ²	600 (09) ²	7mn (09) ²	3.8% (09) ²	10.1% (09) ²	2,000 (09) ²	8.3% (09) ²

¹United Nations World Tourism Organization (UNWTO). ²South Pacific Travel (SPT). ³World Travel & Tourism Council (WTTC). ⁴Other National Tourism Office / Gov't resources (eg. reports / website). ⁵Nationmaster. ⁶International Labor Organization (ILO). ⁷Australian Dept of Foreign Affairs & Trade. NOTE: WTTC figures are not fully endorsed by some countries, but used in the absence of other data.

■ 「島嶼国の観光交流」 / “Tourism Exchange for Small Islands”

ポール・ロジャース UNWTOコンサルタント / Dr. Paul Rogers, UNWTO Consultant

梅村 哲夫 琉球大学 教授 / Dr. Tetsuo Umemura, Professor, University of the Ryukyus

TOURISM EXCHANGE FOR SMALL ISLANDS

Dr Paul Rogers
UNWTO Consultant
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Purpose of the Seminar

to discuss and promote ideas and approaches
for increasing the flow of Japanese tourists
to the participating countries

*(to promote collaboration between the participating
countries – how can you help each other? What
support do you need to help each other?)*

Themes of the Seminar

- ▣ Current hospitality standards and conditions for receiving international tourists, especially from the markets of Japan and other Asia Pacific countries
- ▣ Human resource issues and capacity building for better tourism standards
- ▣ Developing and promoting resources for improved ecotourism, marine tourism and Beach resort experiences on small islands
- ▣ Developing and promoting cultural and community tourism
- ▣ Tourism risk management for natural disasters and pandemics
- ▣ Reducing tourism’s environmental footprint

Indispensable Basic Conditions

- ▣ Political Stability
- ▣ Tourism Policy of Each Government.
 - Some governments put higher priority to the other industries. (e.g. Micronesian countries)
- ▣ Appropriate Tourism Master Plan
 - Tourist site development
 - Regulation to protect tourists and natural environments
 - Specific targeting strategy (JPN, CHN, KOR, EU?)
 - Need tourism market analysis (e.g. Guam)
 - How to introduce tourism foreign capitals
- ▣ Promotion
 - Top sale to important markets

Increasing the Flow of Japanese Tourists

- ▣ Access: air access routes; routing; stop-overs; carriers; – are there issues that need to be aired to improve access? Quick wins vs strategic engagement
- ▣ Product: which products currently appeal to the Japanese market; where are improvements needed; how can improvements be carried forward?
- ▣ Marketing: how effective is current marketing, market penetration and niche marketing; what works now; where are improvements needed – and how can they be carried forward?

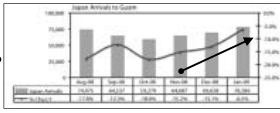
Increasing the Flow of Japanese Tourists

- ▣ Access:
 - e.g. Air Pacific (FJI) is now direct flight from Korea, not from JPN.
 - Introduction of LCC (Low Cost Carrier)
- ▣ Products
 - Need Japanese market research.
 - One product one village (OPOT in THA)
 - Re-distribution of tourism profits to locals.
- ▣ Bilingual / multilingual maps

Japanese Tourists analysis by Tourism Authority of Guam (as of Jan. 2009)

By Country of Residence
Air Arrivals (Civilian & Armed Forces)

Japan	83,724	78,286	-6.5%
Korea	11,782	7,241	-38.5%
Taiwan	1,632	3,244	198.2%
China, P.R.C.	43	48	113.7%
U.S. Mainland	3,797	3,864	101.8%
Hawaii	885	718	-18.9%
CNMI	1,480	1,219	-17.6%
Palau	230	127	-44.8%
FSM	608	609	101.8%
RMI	66	60	-9.1%
Philippines	534	523	-2.1%
Australia	240	207	-20.4%
Canada	109	82	-24.8%
Europe	187	119	-36.4%
Hong Kong	305	208	-31.8%
Nauru	-	n.o.	n.o.
Thailand	7	11	57.1%
Vietnam	6	7	16.7%
Russia	n.o.	76	n.o.
Other/Unknown	354	258	-27.1%
TOTAL AIR ARRIVALS	106,229	97,344	-8.4%



Japanese travel to Other Destinations
Here's a snapshot of how Japanese travelers to other destinations fared in January.

Destination	Visitor Arrivals	% Chg. LY
China	220,700	-27.2%
Hong Kong	184,146	-15.2%
Hawaii	88,417	-12.7%
Guam	76,511	-35.2%
Taiwan	70,742	-28.5%
Singapore	38,343	-27.4%
Vietnam	34,221	-1.3%
Japan	28,114	-9.3%
Australia	26,109	-33.6%
Other	22,302	11.1%

Questionnaire to Japanese Tourists when they enter Guam

Theme 1: Hospitality Standards

- ▣ Where is hospitality important: hotels, tour companies, guest houses, restaurants, taxi drivers, immigration officers, local people & communities, police, others.....?
- ▣ Issues: language barrier, cultural norms and differences, interpretation, managing expectations, training institutions
- ▣ Where is focus needed to improve the Japanese visitor experience?
- ▣ What approaches improve hospitality standards & what experiences are you able to share?

Free Multilingual Maps (Guam, Saipan, Palau)

- ▣ Guam
 - English and Japanese
- ▣ Palau
 - English and Japanese
- ▣ Saipan/ CNMI
 - English, Japanese and Koreans
- ▣ Where to get?
 - Airport
 - Rent a car
 - Hotel
- ▣ Common future
 - Free
 - Ads

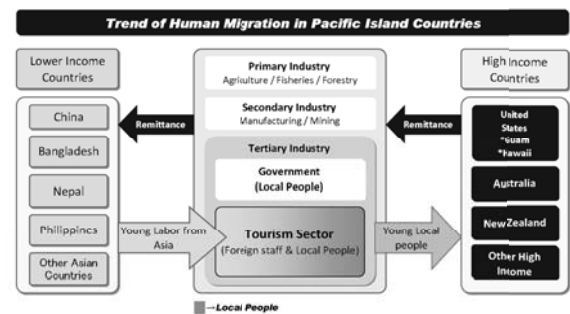
Case of Okinawa-1 Red Sweet Potato and Tourism Collaboration between farmers and manufacture

Case of Okinawa-2 - Tourism + Agriculture - (Nago Pineapple Park)

Theme 2: Human Resources & Capacity Building

- ❑ Where is HR capacity needed: central and local government; tour operators; accommodation sector; transport sector; local NGOs; restaurants; handicrafts; local communities; protected area managers; cultural heritage managers; others.....?
- ❑ What are your human resource and capacity building priorities?
- ❑ What are your priorities for the Japanese market?
- ❑ Can you collaborate and develop synergy to build capacity?

Current Problem - Human Movement --> Brain Drain



Advocate Local Peoples

- ❑ Let them know how important of tourism for them.



- ❑ Important Foreign Exchange Source for PICs
- ❑ Strong Economic Impact for all Industries.
- ❑ Strengthen between primary industry (agriculture / fisheries) and Tourism is very important.

Theme 3: Developing Ecotourism, Marine Tourism & Beach Resorts

- ❑ What are the strengths and weaknesses of current ecotourism, marine tourism and resort experiences - what is done well, what product improvements are needed, are natural resources under threat?
- ❑ What support is needed to build and strengthen your product?
- ❑ Are there policy or investment issues constraining these sub-sectors?
- ❑ Do these products appeal to the Japanese market - what would increase market penetration?
- ❑ Is there scope for collaboration and support?

Theme 4: Developing Cultural and Community Tourism

- ❑ How significant is cultural and community tourism to your destination - is it a key priority or minor policy component of the overall sector?
- ❑ What are your best examples of cultural and community tourism?
- ❑ To what extent does the Japanese market engage in cultural and community tourism - what needs to be done to expand this market?
- ❑ Is there scope for joint collaboration to build and strengthen your cultural and community tourism products?

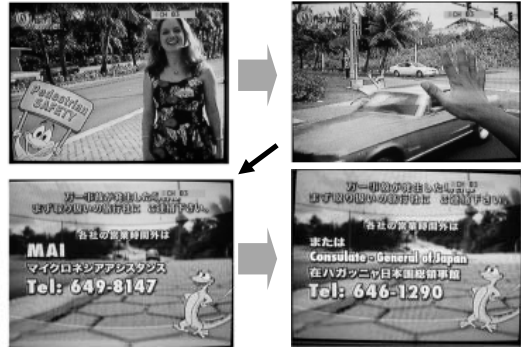
Theme 5: Risk Management

- ❑ What are the greatest risks to your tourism product and economy?
- ❑ What are the immediate priorities for dealing with climate change?
- ❑ How has the Japanese market re-acted and responded to market adversities in the past - how can these risks be minimised & reduced?
- ❑ How and where can the countries collaborate to minimise exposure to risk?

Tourist Police in Thailand
- Special Section to Protect Tourists -



Case of Guam
Lets tourists know the difference of traffic rules to avoid traffic accident



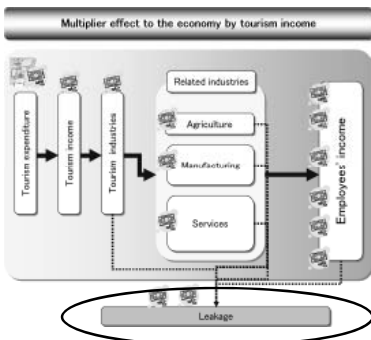
Case of Saipan
- Tsunami Evacuation Route Sign -



Theme 6: Reducing Tourism's Environmental Footprint

- ❑ Which components of your tourism economy have the largest environmental footprint?
- ❑ Which components have the most visible and obvious footprints that are media and market sensitive?
- ❑ What key steps are being taken to reduce your destination's environmental footprint?
- ❑ Which, if any, environmental certification programmes does your destination subscribe to? How relevant is the GSTC at this time?
- ❑ Are there opportunities to work together to reduce tourism's environmental footprint?

Multiplier effects and Leakage



- Tourism sector has higher multiplier effect to the economy comparing with manufacturing goods export.
- Supplying high class tourism goods and services might be caused to increase leakage. ⇒ It will be smaller the multiplier effect.

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Panel Discussions

- ❑ Each country has 10-15 minutes to comment on the Seminar's purpose and six themes
- ❑ Which of these themes - and which areas of these themes - are most relevant to your country's needs and priorities?
- ❑ Where do you see the best opportunities for regional collaboration to support good practice and promote destination development?
- ❑ Where do you see the best opportunities to increase the flow of Japanese visitors?
- ❑ To what extent might competition between destinations undermine opportunities for collaboration?

パネルディスカッションでは、以下の内容が話し合われた。（ポール・ロジャーズ氏報告から要約）

- 主要都市へビジターがアクセスしやすくする為の即効性のある手段はあるか。それは、各航空関係との戦略や、有力な観光関係者次第か。
- 現在、どんな観光商品が日本市場を惹きつけているか。その市場を拡大していくための、改善策は何か。
- 現在の日本市場に対するマーケティングは有効なのか。何が効果的で、マーケットに周知されるために、どんな新しいニッチマーケット戦略をとるべきか。
- 観光経済のどのサブセクターが、ホスピタリティ基準の改良に優先付けられるべきか、日本人観光客の体験向上のために必要とされるポイントはどこか。
- 日本市場を伸ばすために、どのような能力を向上させるべきか。又、どんな人材育成教育が必要なのか。
- 現在のエコツーリズム、マリーンツーリズム、リゾート体験の強み、弱みは何か。こうした観光商品は、どれくらい日本市場を惹きつけているか。日本市場に浸透させる手段は何か。
- どの程度、日本市場はカルチャー・コミュニティツーリズムに参加しているか。各国が協力し、日本市場に観光商品をアピールし、拡大する余地はあるか。
- 日本市場は市場の逆境に対して、過去どの様に反応を示したか。リスクを最小限に抑える為には、どうすればよいか。
- 観光経済のどの分野がメディアとビジターが敏感になっている最大の環境負荷要素か。観光分野における環境負荷を減らすために協力してできることはないか。

質疑応答の内容は次の通りである。

データ収集

バリ島やインドネシアは、観光支出に関するデータ収集の技術と方法に優れている。これらのマニュアル等を知りたい。（モルジブ）

市場調査

各国は日本の市場を理解し、その全体を見渡した中で鍵となるマーケットにどのようにして喰い込んで増やしてゆくに非常に関心がある。そして、日本市場の詳細や多様性に関する質疑がなされた。各国からは日本旅行業協会（JATA）や日本の大学と連携し、市場知識を高められるのではないかと意見もあった。インドネシアは、関係を強め、より情報に通じた、市場調査を促進するために日本の大学と学生交換が必要であるとした。

土地、観光地、リゾート、ホテルのプランニング

このテーマについては、何度も議論がなされた。

- モルジブの“一島に一のリゾート”（それぞれの島毎に特徴あるリゾート創り）
- どこで、どの様な環境で、外国人投資家に土地や個人資産の売買、貸し借りが行われているか
- 環境負荷評価、サイトゾーニング、管理計画の準備と開発のための技術
- 其々の土地計画モデルやアプローチが、地元地域にもたらず、社会経済と環境上の利点の評価、比較に

関する調査

●タイムシェアモデルの利点と制約

地域の参加

インドネシア、バリ、東ティモール、バヌアツは、特にコミュニティ・ツーリズムを推奨。モルジブは、他の参加国からの観光経済において、更なる参加と雇用を促進する方策を学ぶことを希望。

ツアーオペレーターネットワークとファムトリップ

各国は、日本市場に知られていない観光資源がかなりあると感じ、ツアーオペレーターはインバウンドとアウトバウンドオペレーター、そして宿泊供給者とより強く提携することを熟望している。保坂氏は、ファムトリップを促進させるため、各国企業は、地元の日本大使館に連絡を取り、そこからJATAに連絡が入るようにすれば、興味のあるオペレーター選定を開始することができると応えた。

航空路線の問題

日本からの飛行経路を改善することで日本人観光客の行き来が増加する。経済的要因がルート決定に大きく関係しているが、本セミナーでとりあげるには、複雑で適当ではない。

言語の壁

日本語を話せる人が少ない参加各国、そして、英語を話せる日本人が少ない。

この言葉の壁を乗り越え、より日本語使用を広める為に、各国、関係者は、JICA事務所に連絡をとり、どのような可能性を見い出せるか、努力してみることを薦める。

投資と促進

バヌアツは外国直接投資を促す観光整備をおこなっている。モルジブは、観光産業における日本からの投資を増加させることを希望。このためのインセンティブに関する情報共有を各国に求めた。

JICA研修

梅村教授は、沖縄での“サステナブルツーリズム開発”研修参加可否について、4～5月に地元JICA事務所に問い合わせることを提案した。

クルーズツーリズム

クルーズツーリズムの利点は、多数の観光客が、現地で観光商品を購入し、市場や、小売店、またレストランで支出することである。同時に制約されているものとして、食事や宿泊施設の費用は船賃に含まれており、支出が比較的少ない。インドネシアは政策の一つとして、遠隔地域へのクルーズツーリズムを促進することを説明している。観光客を、手がつけられていない、自然観光に仕向けることで、その地域での観光開発の足がかりになり、地域の人たちの権利として、促進することができるとした。

気候変動

気候変動について、インドネシアと東ティモールは、国民やコミュニティに、包括的な教育や、意識を高めるプログラムの必要性を述べた。モルジブは、化石燃料への依存を軽減し、再生可能エネルギーシステ

ムの利用の拡大を促進する必要性を指摘した。

公共と民間セクターとのパートナーシップ

バヌアツ、東ティモールから、公共と民間企業との政策、法的枠組み、また、強固な関係協力と相互関係を築くための情報共有の必要性が述べられた。

セミナーの継続的な開催

各国は、参加島嶼国内の意見交換を行う上で、ビデオセミナーは、非常に有意義で、価値があったとコメントした。東ティモールは、この開催されたイベントの管理と組織化について、多くの教訓が得られたことを述べ、毎年セミナー開催を強く支持すると表明した。

These topics were discussed during the seminar (abstracted from Dr.Paul Rogers)

- Are there areas where quick wins can be achieved to improve visitor access to the key destinations – or is improved access more about strategic engagement with airlines and related influential stakeholders?
- Which products currently appeal to the Japanese market and where are improvements needed to expand these markets?
- How effective is current marketing to the Japanese market – what is working well and where are new niche marketing strategies needed to increase market penetration?
- Which sub-sectors of the tourism economy need to be prioritised for improved hospitality standards and where is focus needed to improve the Japanese visitor experience?
- Where should capacity building efforts be targeted – and what human resource training is needed to grow the Japanese market?
- What are the strengths and weaknesses of current ecotourism, marine tourism and resort experiences? To what extent do these products appeal to the Japanese market and what actions would increase penetration into the Japanese market?
- To what extent does the Japanese market engage in cultural and community tourism – what needs to be done to expand this market and is their scope for the countries to work together to strengthen product appeal to the Japanese market?
- How has the Japanese market reacted to market adversities in the past – and what might be done to minimise exposure to risk?
- Which components of the tourism economy have the biggest environmental footprint, which are media and visitor sensitive and are there opportunities to work together to reduce tourism’s environmental footprint?

Each country responded and raised questions and issues related to the seminar’s purpose and accompanying themes. The range and content of the panel discussions was as follows.

Data collection

Participants from the Maldives recognised Bali and Indonesia in particular have a range of data

collection techniques and methods relating to tourist expenditure that it would like to learn from, and made requests for the participating countries to share.

Market Research

All countries were keen to better understand and profile the Japanese market in order to set about increasing market penetration of key segments of the overall Japanese market. A series of questions relating to the specifics and diversity of the Japanese market were put to the two keynote speakers, with individual countries keen to collaborate with JATA and Japanese universities to improve their market knowledge. Indonesia called for student exchanges with Japanese universities to promote stronger linkages and more informed market research.

Land, site, resort and hotel planning

This theme arose on a many occasions throughout the meeting as follow.

- “One island one resort” in Maldives
- Where and under what circumstances countries allowed to sales or lease of land or individual properties to foreign investors;
- Techniques for preparing and developing environmental impact assessments and site zoning and management plans;
- Research to compare and evaluate the socio-economic and environmental benefits accruing to local communities from different land-panning models and approaches; and
- The benefits and constraints of time-share investment models.

Community participation

Indonesia, Bali, Timor-Leste and Vanuatu in particular advocated interest in different approaches to community-based tourism. The Maldives was keen to learn lessons from other countries that would facilitate greater participation and employment of its nationals in its tourism economy.

Tour operator networks and familiarisation tours

Almost all countries felt that their destinations were partly – or largely – unknown to Japanese tourists and tour operators and were keen to develop stronger linkages between out-bound and in-bound tour operators and accommodation providers. To facilitate and promote familiarisation tours for Japanese tour operators Mr Hosaka from JATA noted local parties should make contact with their Japanese Embassies for the Embassies in turn to make contact with JATA and to start the ball rolling for the selection of interested operators.

Airlines Issues

Improving flight routing from Japan to the participating countries to increase the flow of Japanese tourists; it acknowledged that economic factors are often the sole determination of routing decisions and this webinar was not the right forum to advance this complex agenda.

Japanese language barriers

As few people from the participating countries speak Japanese and few Japanese tourists speak English. In order to overcome these barriers, and to promote wider uptake of the Japanese language, it was recommended that participants should make contact with the local JICA offices in participating countries to explore any opportunities that may be available.

Investment policies and promotion

Vanuatu is working to improve foreign investment within the country. The Maldives noted specific objective to increase Japanese investment in the tourism industry and requested countries to share information on any specific incentives that have been employed to attract Japanese investors.

JICA training

Dr.Umemura suggested contacting local JICA offices in April/May for the availability of training “Sustainable Tourism Development” in Okinawa.

Cruise Tourism

Benefits are the arrival of high numbers of tourists demanding local tour products and their spending of money in markets, retail outlets and restaurants. At the same time constraints such as low spending due to food and accommodation being provided on-board were also aired. Indonesia outlined its policy to encourage cruise tourism to remote sites to, firstly, enable passengers to experience remote and ‘unspoiled’ natural sites and, secondly, help remoter areas get a ‘foot-hold’ in the tourism industry and enable them to develop as destinations in their own rights.

Climate change

Bali and Timor-Leste noted the need for comprehensive climate change education and awareness programme for their citizens and communities. The Maldives pointed out the need of reducing dependency on fossil fuels and promote greater uptake of renewable energy systems.

Public and Private sector partnerships

Vanuatu and Timor-Leste exchanged based on politics, legal frameworks and processes for cementing strong cooperation and partnership between the public and the private sector.

Seminar as an annual event

In their final comments each country noted the value and benefit of the webinar-particularly in terms of networking and exchanging views and ideas between the countries. Timor-Leste noted many lessons on how to organise and manage the event had been made and voiced support for the webinar to become an annual event.

セミナーでは、多岐にわたる事項について話し合われたが、ポール・ロジャース氏によって、8要点としてまとめられた。

1. 商品やツアーの認知度アップ

日本のツアー・オペレーターに、5カ国の旅行商品についてファムツアーで、より認識してもらう必要がある。各国インバウンド・ツアー・オペレーターとホテル協会は、現地日本大使館に要望をあげ、JATAと連絡をとるのがよい。

2. 市場調査

現在の日本人旅行者の、島嶼国への旅行形態と傾向の調査が必要。調査には、日本の大学と各国の市場開発部局間のネットワーク・パートナーシップが必要。

3. 言語の壁の打破

各国は共同でJICA等に、この問題打破のための提案をすべき。

4. データ収集

いくつかの参加国が、ツーリズム・サテライト・アカウントを導入しようとしており、経済のデータ収集方法を改善する必要性を認識している。まず第一に、国の観光当局や民間部門は、経済における観光の重要性を政府に認識してもらう必要がある。

5. 観光地、リゾート、ホテルのプランニング

観光分野の環境負荷を減らし、生物多様性を保護するために、各国は、観光地、リゾート、ホテルの開発について、協業することが求められる。

6. コミュニティ・ツーリズムの開発と促進

コミュニティ・ツーリズムのモデルや取り組みは進展している。特に東ティモール、インドネシアはコミュニティ・ツーリズムの様々な形態を構築、発展させることに強い関心を示した。

7. クルーズ・ツーリズム

多くの参加国が、世界の観光市場の中で拡大を続けているクルーズ・ツーリズムに関わっており、各国は、クルーズ・ツーリズムからどのように最大限の経済的利益を享受できるかに関心を持っている。

8. 能力向上

パネル・ディスカッションでは、何度も能力向上について話が及んだ。能力向上が必要とされる分野について、上記のような7つの提案があった。その中には、次のような能力向上が含まれる。

- ツアー・オペレーターやホテル従事者が、日本市場の動態を理解し、言葉の壁を乗り越えること
- 国や自治体観光当局の統計部門で、高度なデータ収集を可能にすること

- 国の観光計画部門と環境保護地域の管理者が、観光地、リゾート、ホテルのプランニングと管理への取り組みを強めること
- 地元のコミュニティ、NGO、国や自治体の観光当局がコミュニティ・ツーリズムへの取り組みを推進すること
- インバウンド・オペレータや地元のコミュニティが、クルーズ・ツーリズムによる利益を最大限に享受できること

Given the wide range of issues were discussed during the webinar, eight key conclusions were summarized by Dr.Paul Rogers.

I Product Awareness and Familiarisation Tours

There is a need to impart a greater awareness among Japanese outbound tour operators and products available in the five island nations by utilizing familiarisation tours. Inbound tour operators and hotel associations should request local Japanese embassies, so that this able Japanese outbound tour operators to visit destinations through local Japanese embassies with cooperation of JATA,

II Improved Market Research

There is a need for improved market research and investigation into current Japanese visitor patterns and trends in relation to international tourism to small islands. Such research would require networking and partnership between Japanese universities and the marketing and promotion departments of the participating countries as well as their hotel and tour operator association.

III Breaking Down Language Barriers

The language barrier is a major impediment restricting the flow of Japanese visitation. To enhance the capacity of Japanese language, each country should work jointly to submit a proposal to JICA (or a similar agency)

IV Improve Data Collection

Some of the participating countries are in the process of implementing Tourism Satellite Accounting – and each of the countries recognizes a need to improve their processes of gathering economic data. First and foremost to help the national tourism organisations and private sector associations impress upon their governments the economic importance of the tourism sector.

V Improved Site, Resort & Hotel Planning

To reduce tourism's environmental footprint and maximise opportunities for tourism to support biodiversity conservation there is a need for countries to work together to share their approaches to tourism site, resort and hotel planning.

VI *Developing and Promoting Community-Based Tourism*

Models and approaches to community-based tourism are constantly evolving with new lessons and practices being developed. A number of the participating countries, especially Timore-Leste and Bali expressed a strong interest in building and improving different forms of community-based tourism.

VII *Cruise Tourism*

A number of the participating countries are engaged in cruise tourism, which is an area of marked growth and expansion in the global tourism market. There is high interest for the countries to learn from each other to maximise, to the greatest possible extent, opportunities to increase the economic impacts of this form of tourism.

VIII *Capacity Building*

Frequent references were made throughout the panel discussions to capacity building. The seven recommendations above set out key areas where capacity building is needed, these include capacity building for:

- inbound tour operators and hoteliers to better understand the dynamics of the Japanese market – and to overcome obstacles presented by language barriers;
- statistical departments of national and provincial tourism organisations to enable improved data collection;
- planning departments of national tourism organisations and protected area managers to strengthen approaches to site, resort and hotel planning and management;
- local communities, non-government organisations and national and provincial tourism organisations to strengthen approaches to community-based tourism;
- inbound operators and local communities to enable them to maximise their returns from cruise tourism.

セミナーを終えて ◆ REVIEW OF THE SEMINAR

観光は、とりわけ島嶼諸国にとって主要な、もしくは最重要な産業となっているが、島国故の経済的脆弱性と固有の伝統、文化、環境の毀損の懸念が存在するために、その開発には各要素に目配りされた、慎重かつ緻密なプロセスが求められる。

本セミナーでは、その観光開発の問題点を、UNWTO加盟島嶼諸国間の知見、経験の交換とそれに基づく連携によっていかに克服し、改善して、実際に収入、雇用をもたらす国際旅行者の誘致をしていくかという課題を、主に日本からの観光客誘致を例にとって、活発な報告、議論がなされた。

今回参加した国々—フィジー、インドネシア、モルジブ、東ティモール、バヌアツ—は、それぞれ異なる歴史的、地理的背景があり、その観光資源開発、整備には、多様なアプローチが必要とされるとともに、自然災害への対処、環境との調和、住民の参加など共通に認識されるべき事項があることがセミナーを通して改めて確認された。

このセミナーを成功に導いたのは、UNWTOコンサルタントであるポールロジャース氏の献身的で卓越したコーディネーション、司会に負うところが大きであるが、なによりも、友好的で寛容な知見、経験の相互の交換、披歴をした国々の参加者の熱意にあった。

共催いただいた世界銀行東京開発ラーニングセンターは大きな時差をとまなう参加各国会場のビデオシステム接続という困難な作業と、世界銀行の立場からのプレゼンテーション提供もいただき、セミナーの成立に多大な貢献をしていただいた。更に後援、協力をいただいたすべての関係機関、関係者の皆様にも深甚の謝意を表したい。

UNWTO アジア太平洋センター/アジア太平洋観光交流センター

Tourism is one of the major industries for many countries. For small island countries, it is often considered to be the most important sector. However, prudent and minute process suited to each country's circumstance must be taken into consideration to develop these countries, as they are economically weak and have their own different tradition, cultures, and environmental footprint.

In this seminar, UNWTO island members reported and discussed about how to overcome various tourism problems and promote international tourists, especially from Japan. Inbound tourism generates more income and more employment for them.

Participating countries—Fiji, Indonesia, Maldives, Timor-Leste, Vanuatu—have their own historical and geographic background. We have once again recognized that multidirectional approaches are required to promote the resources of the islands. There are common issues for all these countries, including natural disaster management, harmony with the environment, and how to encourage people to participate in tourism development.

UNWTO Consultant, Dr. Paul Rogers made a great contribution to the seminar, with his skillful coordination and moderation. We also believe that great factor behind the success was the enthusiasm of all the participants, who joined to the seminar supportively to introduce their knowledge and experiences.

The World Bank Tokyo Development Learning Center (TDLC) helped us not only with the coordination

and video network connection to each studio with big time differences, but also offering their presentation for the seminar. We deeply appreciate all the sponsors, cooperated authorities, presenters and panelists from Japan and each country, and all the people concerned to this seminar.

UNWTO Regional Support Office for Asia and the Pacific
Asia-Pacific Tourism Exchange Center



世界観光機関(UNWTO)アジア太平洋センター
UNWTO Regional Support Office for Asia and the Pacific

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