

Agritourism Experiences: A Situational Analysis

Until recently, experiential tourism was thriving globally, and with more adventurous travellers likely to be the first to return is there an opportunity to tap into this growing market?

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About Us

Funded by the Australian Centre for International Agricultural Research and facilitated by a consortium of implementation partners, Pacific Agribusiness Research in Development Initiative 2 (PARDI2) seeks to promote sustainable livelihood outcomes for Pacific Islands households through research and innovation, catalysing and informing a more vibrant, diverse and viable agribusiness sector.

The project spans 2017-2021, placing a geographical focus on Fiji, Tonga and Vanuatu. For more information, please visit www.pardi.pacificfarmers.com



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Executive summary

Harvesting cacao pods at KokoMana. Photo: Ian Markham, Wild Hope Collective.



A large percentage of people in the Pacific live in rural areas and have access to customary land. Agriculture is integral to livelihoods and wellbeing, and the majority of those living in rural areas work as smallholder farmers on a semi-commercial and subsistence basis. Investing in agritourism product development and promotion can support farmers to diversify and earn additional income, leading to both a stronger rural economy and a more engaging and rounded national tourism offering that meets changing consumer expectations.

The importance of land

In the Pacific, the relationship between people and land is complex and deeply intertwined with culture. Land is a source of resilience that has enabled communities to survive the impacts of real and economic storms. Land and its interconnections with the traditional economy, also plays a role in people's wellbeing. Pacific Islanders have understood this for generations and it has achieved increasing global recognition, through for example, The New Economics Foundation ranking of Vanuatu as the 'happiest country in the world' (2006) and the fourth happiest (2016). The traditional economy, rich natural capital, unspoilt coastlines, and unique rainforests were key factors in the ranking (NEF 2006 and 2016), with their continued existence based on hundreds of years of sustainable resource management based on ancestral traditions and practices. In Vanuatu and many Pacific countries, these traditions are still practiced, but are increasingly under threat.

Supporting the connection to land, the use of traditional knowledge and resource management, and sustainable cultural practices can enhance resilience, not only at a time when these things are being eroded, but also at a time when the Pacific islands are increasingly facing the effects of climate change. Vanuatu, Tonga and Fiji have all experienced category five tropical cyclones in the last six years (Tropical Cyclones Pam, 2015, Winston, 2016 and Gita, 2018) and in April 2020, were once again subjected to a category five cyclone in the form of Tropical Cyclone Harold.

On top of this, the COVID-19 global pandemic is severely impacting tourism dependent economies, with many people returning to farming their land. Globally, it has been estimated that there will be a 45-70% decline in the international tourism economy in 2020, depending on the duration of the crisis and the speed with which travel and tourism rebounds (UNWTO, 2020a). While there is an immediate need to assist tourism businesses, it is important to think beyond the current response to COVID-19 and to develop coherent, widely consulted plans to both support recovery efforts, and to build a stronger, more resilient, and more inclusive tourism sector.



Agritourism experiences as a resilient tourism product

Investing in the development of agritourism experiences has the potential for a broader positive societal impact beyond the increased income for any individual farmer or community. Agritourism, particularly if based on traditional, sustainable and regenerative agriculture, can play a role in supporting the resilience of farming households, improving health outcomes and diversifying the economy to be less reliant on high-volume and low-value tourism.

If done well agritourism can provide a suite of benefits to Pacific countries such as:

- ▶ Promoting traditional, sustainable and regenerative farming techniques
- ▶ Enhancing climate resilient agriculture
- ▶ Addressing leakage from tourism
- ▶ Addressing rural to urban migration
- ▶ Contributing to a fairer distribution of tourism revenue
- ▶ Creating new green value-added markets for local commodities
- ▶ Increasing income for rural smallholder farming households
- ▶ Increasing consumption of local food in the tourism industry and households

Achieving these outcomes requires policy and marketing approaches that support the promotion of traditional farming and local Pacific cuisine. Unique agritourism experiences can be an attraction in their own right and can change the perceptions of tourists to encourage them to expect and seek out local food and to purchase value-added products made from local ingredients. Farm to table experiences allow farmers to engage directly with visitors to showcase local produce, planting and harvesting techniques and can lead to more equitable distribution of tourism revenue.

In responding to the COVID-19 crisis, tourism recovery plans should recognise the importance of supporting agritourism development to building local markets and jobs. This includes supporting rural smallholder farmers, rural women (through the harvesting of tropical fruits and nuts, and other produce, such as handcrafts), expanding opportunities for agri-processors, and strengthening links to retailers and exporters. This would lay the foundation for a more balanced and regenerative tourism industry once visitors return.



This situational analysis provides policy and decision makers, private sector partners and industry stakeholders with an overview of the current market trends, opportunities and challenges to developing agritourism experiences in Fiji, Tonga and Vanuatu. Whilst these are evolving in light of the current crisis, the current situation also represents an opportunity to review current policies and practices, and work to develop new or niche activities, including agritourism experiences.

Based on a desk review and interviews with key stakeholders, the strength, weaknesses, opportunities and threats for each country in providing agritourism experiences were assessed. While each country faces country-specific issues, there are also commonalities. The most common weaknesses relate to the enabling environment for small entrepreneurs to business entry, including policy incoherence, taxes and financial reporting, access to financing, marketing and branding. Significant improvement could be made in each area through collaborative work between government ministries, private sector and agricultural support organisations, and financial institutions. The commitment to national tourism policies is usually high. However, these policy commitments do not always translate to changes in the behaviour of actors that small operators engage with on a day-to-day basis. There are opportunities for the public and private sector to engage in dialogue and progress collective action on some of the identified barriers.



1. Background

Orchids on display at the Garden of the Sleeping Giant. Photo: Matt Capper



Globally, there is recognition that “the economic engine of tourism, as currently practiced, is unsustainable” (Pollock 2019). This is gaining increasing attention in mass media since the imposition of travel restrictions as a result of the COVID-19 global pandemic. The mass tourism model, or ‘over-tourism’ is based on an economic model which has resulted in heavy impacts to Pacific Islands environments, cultures, and societies, particularly for indigenous peoples. This, combined with the significant contribution the tourism industry makes to climate change, is resulting in a shift in how people see travel. As a result, there is a growing number of tourists who are now changing their values, behaviour and motivation for travel. This paradigm shift is resulting in an increasing search for ‘transformative tourism’ or ‘regenerative tourism’, by people who travel to make a positive difference and who seek out like-minded businesses.

Increasingly tourists are yearning for meaning, they want to make a contribution, and engage in deeper and more meaningful ways with destinations. The word ‘tourist’ is increasingly being seen as superficial and inferior to ‘traveller’, particularly among the younger generations which can be seen in numerous instagram posts. While the mass tourism model is still appealing to the baby boomer generation through the high numbers of this demographic taking mega cruises to the Pacific islands and large packaged tours, it is unclear if there will also be a change in their preferences post COVID-19 pandemic (Coote, 2020).

A 2017-2018 survey of over 11,000 travellers conducted for the Expedia Group asked respondents to identify which considerations were most important to them in choosing a holiday (Expedia 2018). The top three responses were: (1) Activities I will be doing on my trip; (2) A once in a lifetime experience; (3) The cultural experience. Yet, the current model of tourism in the Pacific is underrepresented when it comes to opportunities for real and meaningful engagement with local guides, hosts, farmers and through them to the rich and diverse cultures of the region.

One area where tourists are seeking transformative, regenerative experiences is in agritourism. Experiences such as farm stays, farm to plate dining, and cultural immersion are gaining traction aided by the rise in social media.

‘Any attempts at strengthening linkages between smallholder farming and tourism need to focus on sustaining smallholder agriculture, both economically and ecologically, while finding ways to support a tourism ‘product’ that is also viable and sustainable’ (Addinsall, Scherrer, Weiler & Glencross, 2016, p. 3).



However, creating high quality tourism products is not straightforward. The tourism sector demands certain standards with respect to tourism products, in particular relating to food health and safety. These standards are likely to be even more important in the COVID-era. For example, due to insurance policies for cruise passengers on shore tours are unable to serve food to cruise passengers. Also, the limited time cruise passengers have in the host destinations makes it infeasible to travel to rural areas. Other constraints to small community and farm operators include the unfamiliarity of the tourism industry, and particularly tourism value chains which can be complex and include many actors. Sharing knowledge and advice to support product development is needed, including training for guides and advice on required infrastructure improvements, marketing and selling within the tourism sector.

This situation analysis provides policy and decision makers, private sector partners and industry stakeholders with an overview of the current market trends, opportunities and challenges to developing agritourism experiences in Fiji, Tonga and Vanuatu.



2. Global Trends

Gnetum gnemon at Waimakare Forest Farm, an ancient tree from Asia and Fiji and a very good food source. Photo: First Fighter Productions.



2.1 Agritourism based on traditional and regenerative practices

Starting in the 19th century and reaching new heights with globalisation, mass tourism has enjoyed a long and successful reign. Traditionally flights, accommodation and resort-based activities have been packaged up into the all-inclusive “flop and drop” holiday (Boiko 2016).

However, today’s landscape is remarkably different. Over time consumer attitudes have shifted, travellers are moving away from packaged, cookie-cutter escapes towards adventurous, authentic and off-the-beaten track experiences. Twenty years ago no one in Finland or Japan could have predicted that people would pay to spend the night in an igloo or watch Sumo wrestlers in a training session.

The demand for these types of immersive, local experiences is booming, causing a robust and systemic shift, which can be seen from studies estimating an annual growth of +9% annually to a value of \$150 billion for experiential travel (Bigg, Stone, and Borko 2018). In 2018, The Wall Street Journal reported that “the amount spent by travelers on tours, attraction, events and activities has swelled 21% since 2014 to \$159 billion” (Al-Muslim 2018).

Jamie Wong, founder and CEO of Vayable, a user-generated, online marketplace for tours and activities, was quoted as saying: “Globalization and technology have led to the homogenization of cities, which has resulted in travelers craving locally made and authentic experiences. People want to reclaim what’s real. Mass tourism is no longer sufficient” (Peak DMC and Skift 2014).

However, current models of tourism in the region provide limited benefits to rural smallholder farmers and their communities, particularly as foreign ownership and mass tourism encourage geographic concentration in tourism enclaves and economic leakage (Tolkach, Cheer and Pratt, 2018). An increasing number of rural communities are partaking or expressing interest in locally owned sustainable tourism development, yet in Vanuatu, for example, locally owned businesses receive less than 10% of the overall tourism expenditure (Addinsall, Weiler, and Spooner 2018).

Transformative and regenerative tourism seeks to provide a fairer distribution of revenue from tourism without causing intolerable ecological and social damage. Capitalising on the potential to develop quality and unique agri-experiences based on traditional farming, can support countries in the Pacific to enhance their tourism offerings and support smallholder farmers to diversify their revenue streams. This requires bringing together the collective knowledge of operators, potential operators, tourism ministries and tourism marketing agencies to support growth in this area.



Agritourism linkages have been proposed as the most direct ways to address the disconnection between local farmers and the tourism industry in the Pacific. Improving these links would help to address issues such as urban migration, poverty in rural areas, food security and influx of imported food. Shrybman (2000) argues that “the globalisation of agricultural systems over recent decades is likely to have been one of the most important causes of overall increases in greenhouse gas emissions”.

These factors are influencing an alternative way of thinking that sees smallholder farms as livelihood systems incorporating food security and a diversification of both on and off farm income-generating activities. Farms in the Pacific have various strengths that lend themselves to a quality agritourism experience. Smallholder farming in the Pacific is predominately based on traditional gardening systems which are critical for food security, housing, employment, social security, biodiversity protection and ecological stability. They are also a store of natural medicines, as well as a source of social cohesion, inclusion and cultural reproduction. Tourism based on these traditional farming systems is defined as ‘agroecological tourism’ (Addinsall et al 2015), which is seen as a strategy for integrating positive conservation, food security and livelihood outcomes for rural smallholders. Agroecological tourism has a primary focus on the interpretation of sustainable traditional agroecosystems which exhibit cultural and heritage significance.

Agroecological tourism has the potential to support traditional practices, enhance the preservation of cultural knowledge and promote sustainable farming practices. It is also these types of farms that are most appealing to guests as an agritourism experience.

2.2 Tourism and COVID-19

As international travel rapidly declined due to the COVID-19 crisis, international and domestic tourism headed for an unprecedented downward spiral. The global tourism system and hospitality value chain collectively experienced a dramatic shock, encapsulating air, land and sea transport, accommodation, cafes and restaurants, national parks, historical sites, museums, conventions, festivals, meetings, nightclubs, theatre, shows, performances and sporting events.



The United Nations World Tourism Organisation (UNWTO) projected a 58% to 78% decline in international arrivals in 2020, equating to a US\$ 910 billion to US\$ 1.2 trillion reduction in export revenues from tourism (UNWTO 2020). The World Travel and Tourism Council (WTTC) projects a US\$ 2.1 trillion reduction in 2020 with an estimated 100 million direct tourism and hospitality jobs lost (WTTC 2020). UNWTO's key message called for shared responsibilities amongst travelers with their 'Staying home today means traveling tomorrow' campaign (UNWTO 2020b).

The South Pacific Tourism Organisation (SPTO) and MFAT have published a tourism sector status report focussing on seven countries: the Cook Islands, Fiji, Niue, Tonga, Samoa, Solomon Islands, and Vanuatu. This report highlights how international tourism is key to the health of these Pacific island economies, with tourism estimated to comprise approximately 38.9% of Fiji's GDP, 25.4% of Tonga's GDP, and 45.9% of Vanuatu's GDP (FORWARD 2020).

Trends that are likely to emerge post COVID-19 include: more domestic tourism, a desire for travel privacy and distancing from others, a rise in nature tourism, shorter and more frequent trips closer to home, and an increase in road trips, as they implicitly combine several of the other trends (Wein 2020). The Pacific Islands tourism industry is not well-placed to capitalise on many of these trends by virtue of its geography and a reliance on cruise and resort-based holidays.

2.3 Who wants to be a tourist?

Alongside the development of transformative or regenerative tourism, the notion of a "tourist" is rapidly becoming outmoded.

"No one wants to be a tourist – not even tourists. It has connotations of uncritical consumption, of high prices and low quality, of being mindlessly funnelled amid a mass of humanity towards the sorts of joints that real New Yorkers or Londoners or Parisians wouldn't be caught dead in."

Elle Hunt, The Guardian (2017)



Pauline Sheldon from the Emerita University of Hawaii suggests the tourism industry must change dramatically to ensure that it connects with the shift in values of tourists: “Our tourists are also changing. We found that there is a significant portion of the travelling public who are shifting their values and their motivation for travel. They’re yearning for meaning. They want to make a contribution. They have benevolence, generosity. And they are really wanting to engage in deeper and more meaningful ways with destinations.” (Barclay 2019).

A 2018 survey undertaken by Booking.com, indicated that ‘doing’ weighted equally with ‘going’, with almost two-thirds of travelers (60%) valuing experiences higher than material possessions (Booking.com 2018). There have been significant drops in the all inclusive resort model as travellers seek independent accommodation through Airbnb or home stays. Travellers want to “travel better, on a deeper emotional and more personal level” (Peak and Skift 2014). From street food safaris in bustling Bangkok, chocolate-making and tasting in Western Australia, home-based cooking classes in Delhi, to learning how bees live, work and make honey in Lousa, Portugal, the demand for locally made and culturally connected activities is thriving.

Research by Expedia found a clear and significant pattern across regions and spanning generations, indicating that although budget is a consideration, travel decisions are governed by the heart, not head. According to those canvassed, culturally immersive, once-in-a-lifetime experiences and activities are what drives travel decisions (Expedia 2018).

The researchers also found that travellers are increasingly seeking some form of transformation, personal development, or fulfillment, and they want to know that their travels are, in some way, fulfilling for others too. Laura Fink, VP of marketing at American Express Travel believes: “Consumers want to have life-fulfilling experiences when they travel, and they are seeking travel experiences that closely align to their own personal values.” (Peak and Skift 2014).

This is supported more recently by research undertaken by Booking.com which found that a “majority of global travelers (86%) would be willing to spend some time on activities that offset the environmental impact of their stay, with over a third (37%) willing to clear plastic and litter from a beach or other tourist attraction” (Booking.com 2018).

Adventure tourism, a niche once reserved for live-on-the-edge, status symbol-style activities, is rapidly shifting. The Adventure Travel Trends Snapshot (ATTA 2019) reported travelers are chiefly motivated by “new experiences”, are keen “to travel like a local”, and engage with cultural encounters. Sustainable itineraries and “slow” travel activities are on the rise, such as safaris, culinary tours and hiking, with 35% of those surveyed saying this progression is a key factor driving growth.



2.4 Backed by behavioural evidence

The digitisation of the tourism industry is allowing us to measure and capture these trends. Consumer claims are backed by solid data with online travel giants applying sophisticated data algorithms to capture, monitor and measure consumer behaviour.

There is strong evidence for growth across the experiential sectors. Since 2015, there has been year-over-year growth across categories such as outdoor activities, cultural and theme tours, and food experiences ranging from 40%-100% (Taylor 2018).

In 2018, when Tripadvisor evaluated internal bookings and millions of independent, worldwide traveller reviews they found (Taylor 2018):

- ▶ 67% more travelers chose to book an outdoor activity like glacier hiking, bungee jumping, scuba diving, or mountain biking.
- ▶ Cooking classes and immersive workshops in subjects like painting and architecture jumped 61%.
- ▶ Food, wine, and nightlife experiences were also up 45%.
- ▶ 59% more travelers decided they'd rather engage in a cultural excursion or an historically-themed tour than sit by the bar or get sunburned on the beach.

Tourism's more conventional players are paying close attention, and are looking to to pivot from their usual formula:

- ▶ Flight Centre Travel Group (FCTG), with more than 2,800 retail outlets and an array of international travel brands, has started promoting "best-kept secrets", sizzling street food, and activities with a "traditional feel" (Cronin n.d.).
- ▶ Although historically hotels have tried to keep guests within the grounds and maximise revenue, there is now widespread acceptance that guests are more interested in exploring outside the hotel walls (Peak and Skift 2014).



2.5 A digital world

Underpinning these changes is technology, particularly the powerful rise of social media, and the sharing economy.

For millions of years humans have always sought to belong to collectives larger than themselves, a quest once limited by geography. However, today's seamlessly connected world has opened the doors, with individuals finding "their people" online. Online tribes are founded on sharing personal, authentic, exclusive and meaningful stories people can identify with (Godin 2008).

Today it is possible to watch people visiting amazing places every minute of every day. It is inspiring, influential and creates envy. Commonly referred to as the "Insta Effect", this is a crucial component driving and sustaining the evolution of experiential travel. It is not just about the experience itself, but also the sharing of that experience. Travelers are seeking activities that are authentic and immersive, but also broadcast-worthy.

Victoria Loomes, a senior trend analyst at trendwatching.com has stated: "In the past, social status often went hand-in-hand with the ownership of material possessions – think cars or designer handbags. But now, there's a greater emphasis on experience, skills and personal development. And in a social media-led world, it's all about how you share these new status signifiers" (Hart 2017).

With online travel agents and a stream of apps available, according to Chris Burkard, a photographer with National Geographic "you're less than 10 clicks away from seeing an image on Instagram to purchasing a ticket to go there (Thomas 2019)."

This has led to the emergence of alternative marketing channels such as "influencer marketing" with social media trendsetters incorporating brands, products and destinations into their lifestyle feed and feeding this out to their large, content hungry following. According to Fullscreen Media, within the 18-34 year old demographic, 42% admit to trying a product recommended by an influencer, whilst 26% say they have actually made a purchase based on a recommendation (Grimaldi and Chowdhary 2018).

Between 2009 and 2014, visitors to Trolltunga in Norway increased from 500 to 40,000 per year in what many considered a wave of social media-fueled tourism, a long queue of hikers weaving around the rocky terrain each morning, all waiting for their chance to capture their version of an Instagram-famous shot (Miller 2017). Similarly, in 2015, the local tourism board in Wanaka, New Zealand began inviting and hosting influencers to post about their adventures. The result was a 14% increase in visitors, the fastest tourism growth in the country (Mitchell 2016).

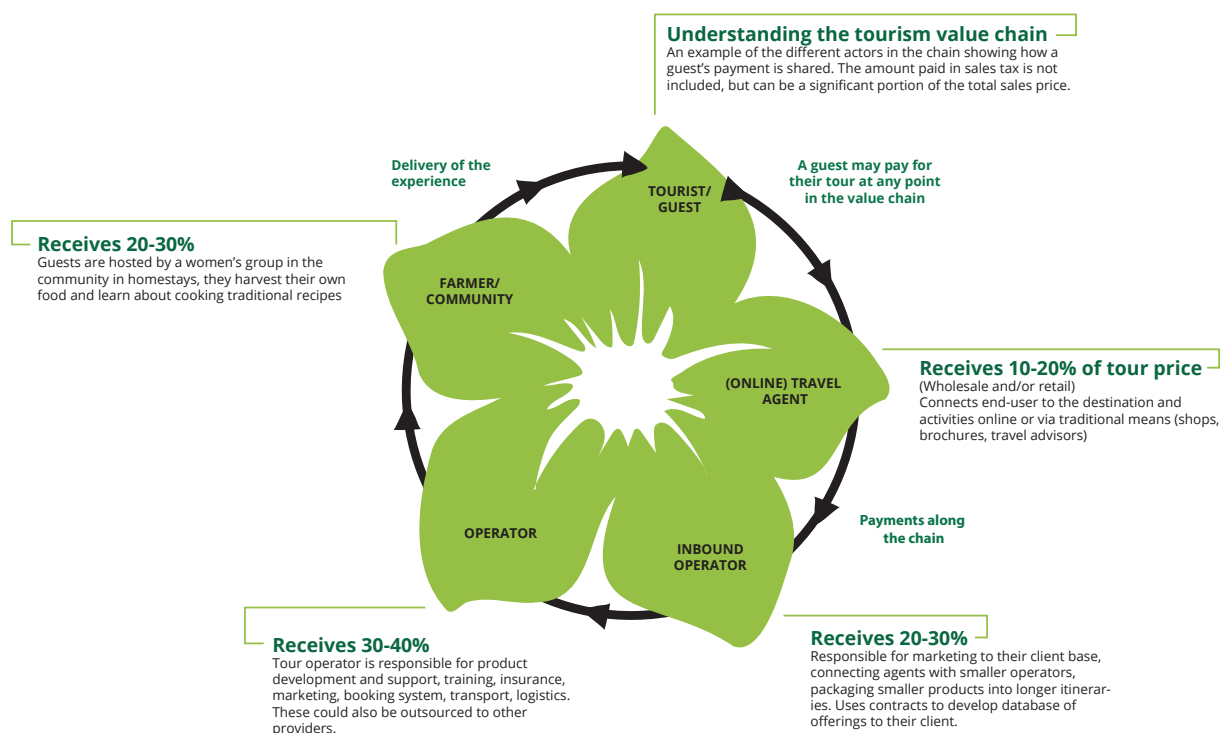


2.6 The value chain

Understanding the experiences that guests value and identifying key actors will be vital for operators planning to enter the burgeoning agritourism experiences market. The tourism value chain is defined as: “a system which describes how private sector firms in collaboration with government and civil society receive or access resources as inputs, add value through various processes (planning, development, financing, marketing, distribution, pricing, positioning, among others) and sell the resulting products to customers. The value chain describes the full range of activities that are required to bring a product from its conception to its end use and beyond (Hawkins & Nikolava, 2005, p 2). The customer experience must be the focus of any tourism value chain.

Value chain analysis is important because information is shared amongst the actors, which in turn leads to better decision making by those involved. It also pin-points those private sector or government actions that will result in value enhancement and increased competitiveness.

For the purpose of this analysis, a hypothetical ‘on trip’ farm tour experience value chain is illustrated here.



A key enabling actor not illustrated in this value chain is the government, which is responsible for policies that govern almost every step of the chain, from licensing of operators, transport, food and beverages, inbound operators, levies and taxes.



3. Country analyses: Fiji, Tonga and Vanuatu

Inspecting hives at Waitika Farm. Photo: Jean Tikaram.



3.1 Fiji situation analysis

Annual visitor numbers to Fiji have shown steady growth. In 2018, there were 870,309 visitors, and in 2019 there were 894,389 visitors, indicating a growth of 2.8%. In economic terms, tourism earnings increased by 2.18% recording F\$1.24bn in 2017 and F\$2.01bn in 2018 (Fiji Bureau of Statistics [FBoS] n.d.). For 2018, total employment by the tourism sector amounted to 90,700, which is 26.3% of total employment (World Travel and Tourism Council 2020a).

Table 1 illustrates the numbers of visitors received by Fiji from 2017 to 2019 including the number of visitors from Fiji's two largest markets.

Table 1: Fiji visitor arrivals

	2017	2018	2019
Fiji Total	842,884	870,309	894,389
AUS visitors	365,689	365,660	367,020
NZ visitors	84,595	198,718	205,998

Source: Fiji Bureau of Statistics website

Australia continues to account for the largest number of visitors into Fiji. Visiting Fiji for a holiday remains the highest reason for visiting Fiji. According to the 2019 International Visitor Survey, 78% cited 'holiday and vacation' as the predominant reason for visiting Fiji (Fiji Ministry of Industry, Trade and Tourism, Fiji MITT, 2020). Other top four reasons for visiting included family gathering/reunion, anniversary/birthday, scuba diving and adventure travel.

The average length of stay in 2019 was 8 nights (Fiji MITT, 2020). For the two main markets, an average Australian spent approximately F\$2,503 with New Zealand slightly lower, at F\$2,237 per trip. Based on the previous visitor survey conducted in 2014, the largest spend is by visitors who come for 'rest and relaxation' with an amount of F\$1 billion in 2014, while those on honeymoon, though only 7% of visitors, spend twice the average amount totaling F\$44 million (Fiji MITT, 2016). Similarly, scuba divers, a high spending group, who make up only 1% of visitors, spend a total of F\$38 million. Other key niche markets, such as weddings (F\$77m), surfing (F\$5.4m) and golf (F\$2.1m) yield a higher return as compared to the 'rest and relaxation' visitor.

The top five most popular activities taken by visitors in 2017 were sea swimming (undertaken by 65% of visitors), walking (50%), beach walking (50%), shopping (44%) and snorkeling (42%). Interestingly, village visits/tours were ranked thirteen out of the nineteen activities scoring a 25% (Fiji MITT 2018).



In 2019, adventure travel, including surfing and diving, totalled 13% of visitors (Fiji MITT, 2020). This type of travel also includes nature-based activities, such as birdwatching and farm tours which scored very low to zero percentages on the activities table in 2014 (Fiji MITT, 2014). This could indicate that there was very little awareness of products, such as agritourism experiences, but is more likely to reflect the number of such products on offer to visitors. While there has been growth in this area there is also limited product development support for those that want to get involved and to acquire the knowledge to succeed in agritourism in addition to their farming.

The evolution of agritourism

For Fiji, many of the agritourism forums have focused on the links between agriculture and tourism through the supply of local ingredients to hotels, including the farm to table concept. These approaches connect farmers, to procurement officers and to chefs who ultimately design the menus and make the purchasing decisions that drive demand.

However, there are a handful of established operations offering visitors farm experiences and some of them have been offering these experiences for over a decade. Current agritourism experience businesses include: Bobo's Farm, Bulaccino Organic Farm, Nabogiono Farms, Spices of Fiji, Flavours of Fiji, Gaiatree Sanctuary, TeiTei Homestay and recently Tukuni Restaurant. It is exciting to note that there is growing interest amongst smallholder farmers diversifying into this niche and offering farm tours and stays for additional revenue. The development of agribusinesses offering new farm tours in the last year has included KokoMana, Waimakare Forest Farm, Waitika Farm, and the recently launched Bulaccino Organic Farm.

Efforts from chefs have sought to connect key stakeholders along the value chain. An agritourism week in 2015, featured celebrity chefs, Shailesh Naidu, Collin Chung and Robert Oliver on Denarau for cooking shows (Qalobau 2015). In 2018, the International Finance Corporation (IFC) published a report titled, *From Farm to Tourist's Table: A Study of fresh produce demand from Fiji's Hotels & Resort* on its study of fresh produce demand from Fiji's hotels and resorts in addition to the volume of imports hotels and resorts were involved in per year (2018). At these events, discussions centered on food, including farm to table (farm to fork) concepts. However, there was a limited consideration of farm visits and stays.

Fiji Tourism 2021 (FT 2021), the national guiding policy framework for tourism, does not give agritourism experiences a formal acknowledgement as a new niche product to be explored. Instead, FT 2021 indicates that there is a need to strengthen linkages between the agriculture and tourism sectors, through the use of more locally grown food in restaurant foods. The plan recognises that the economic benefit of tourism should be distributed as much as possible to host communities.

The following summarises the strengths, weaknesses and constraints, opportunities and recommendations of agritourism in Fiji



Strengths

1. Fiji has abundant land- and marine-based resources including farms, aquaculture and horticulturally-based operations. This is the basis of any form of agritourism experience.
2. There is an established agritourism working taskforce in place, but it is not clear if the taskforce is functional. The taskforce is private sector driven. This platform has the ability to make submissions and recommendations to support a vibrant agritourism industry.
3. Some farmers have already diversified and have opened up their farms for visits. These could act as model farms to interested farmers.
4. There are high visitor numbers, but few experiential activities. There is scope to offer visitors activities beyond the sun, sand and sea experience.

Weaknesses and constraints

1. There is no standard definition of what an agritourism experience is or guidelines for those pursuing this market that could support product development.
2. The FT 2021 plan does not recognise agritourism experiences as a niche, thus it may not be viewed as a priority by the government for support.
3. There are high levels of bureaucracy associated with land tenancy and leases. Most farmers have agricultural leases. Should farmers intend to offer farm tours, these need to be converted to tourism or commercial leases. In addition to the time associated with this process there are also establishment and ongoing lease payments which act as barriers to most ordinary farmers.
4. There is a lack of effective coordination, networking and joint action between the public and private sectors in promoting this niche market.
5. There is a lack of awareness and support for farmers wishing to diversify into this area, especially in the area of product development, to help them understand the potential market and its requirements. There are limited business advisory services to support sector and product development.
6. There is limited data and market research available to identify the number of visitors who have engaged or are interested in such experiences.
7. Some of the more attractive farms are located in remote areas and islands are difficult and costly to reach. Poor transport including limited flight schedules and the lack of coordination between international and national flights results in unsatisfactory inter-island transport options. Options include expensive domestic flights, which can be unreliable, and ferry travel which not only is time-consuming, but uncomfortable at times.



Opportunities

1. FT 2021 has identified the need for a Tourism Act that is conducive to an evolving tourism industry. This is a great platform to address and clarify the legal framework that will guide agritourism experience operators.
2. As farming is such an important part of many communities' daily activities there are potential agritourism experiences everywhere. Tourism associations in various regions could support the identification of potential and interested agritourism experience operators.
3. Several new and existing businesses are pioneers in this market. The identification of champions and role models could support peer learning in the development of agritourism experiences.
4. There is an opportunity to expand the support for emerging agritourism experience farmers through collaborative public-private partnerships.
5. Improving the dialogue with financial institutions, especially banks, on their financing models could improve the access to loans for the development of new agritourism experience operators.
6. An agritourism plan that includes all relevant stakeholders could map out key strategies, standards and guidelines to support the growth of the sector.
7. Further engagement with Tourism Fiji is needed to identify and include agritourism experiences on their website and social media channels.

Threats

1. The increasing severity of external shocks such as natural disasters and health crises will have negative effects on the potential development of agritourism experiences. Fiji is still rebuilding from the impact of the category five Tropical Cyclone Winston that hit the country in 2016. Cyclones can have devastating effects on agricultural production and therefore farm experiences.
2. The tourism industry is particularly vulnerable to global economic downturns from its main source markets, climatic disasters, foreign exchange rate changes and disease outbreaks.
3. The absence of strategic guidance and standards can lead to poor quality offerings which then create unsatisfactory guest experiences. This leads to a lack of understanding of the agritourism experience market and competition, especially from other countries and tourist destinations. This will become even more important in a COVID-19 world.



4. Farmers must overcome potential negative perceptions of farms and farmers. For example, there is potential for a fear of illness related to hygiene and sanitation infrastructure and a fear of catching tropical diseases such as dengue fever, leptospirosis and typhoid to influence visitor choice.
5. Starting a new business is time consuming. Farmers must take care to balance their core farming business, which can be neglected as a result of expanding into a new area. The cost of starting up a business is also high and the requirements of the industry, including the requirement for public liability insurance, make it difficult for new and small operators to comply.

Recommendations

1. The Agritourism Taskforce should be formalised, to act as the link between farmers and government. Within this taskforce, an agritourism experience arm should be established to focus only on farm visits, tours, and stays and to establish standards and guidelines.
2. Key partners should collaborate on the implementation of action plans and strategies to support those interested in this niche with clear standards and guidelines. Having these will help to ensure operators and visitors have a positive experience. This is particularly important in positioning operators in a COVID-19 World.
3. Tourism Fiji should add agritourism as a stand-alone experience in its website. Agritourism does not currently feature as part of the site apart from under 'Nature and Scenic areas'. This creates confusion to visitors who are explicitly looking for agritourism experiences.
4. Consultation and discussion forums should be held in regions where there is a potential for agritourism, so that farmers can gain a better understanding of the business of agritourism experiences and its value chain is clear. Getting experiences right can prevent negative experiences for both tourists and hosts.
5. The Fiji government should encourage financial institutions to review lending rates and procedures to stimulate entrepreneurship amongst smallholder farmers.



Case study: South Sea Orchids



Business summary

In 1965 Don and Aileen Burness established their floriculture business in Suva. In 1987, the Burness' relocated to the western side of Fiji and re-established South Sea Orchids in Saweni, Lautoka. They made their final move to an old sugarcane farm in Nasau, Nadi in 2002.

South Sea Orchids started an outgrowers programme in 1996, and began running workshops for growers, both locally and regionally, promoting best growing and harvesting practices. Their core business is selling cut flowers such as heliconia, anthuriums and orchids and plants. Orchids are their main selling flower.

It is currently a limited liability company.



Agritourism experience products

South Sea Orchids has opened up its nurseries and home for tours to tourists. These tours include looking at family antiques, which date back 300 years in the family home. Visitors are then treated to some homemade refreshments before moving on to the nurseries. These tours range from FJD40-60 per person, with discounts available for children upon request.

Apart from the core floriculture business and the tours, South Sea Orchids also hosts events such as weddings, anniversaries, birthday parties and workshops.



Visitor profile

South Sea Orchids receives an estimate of 1,300 visitors annually. These visitors, the majority of which are cruise ship passengers, are from Australia, Europe, New Zealand, the United States and the United Kingdom. Most of these visitors come in groups.



Sales and marketing

The current tourism sales channels for the company are inbound tourism operators and direct sales via word of mouth. The company hopes to expand into more direct sales via website enquiries and partnerships with hotels, rental car operations and other companies.



Revenue

An estimated 30% of revenue is derived from their agritourism experience product. The other 70% is from the core business of flowers and plants sales with venue hire contributing a small amount.



People

A total of eight individuals are employed by South Seas Orchids, of which 50% are women. The eight staff also support the agritourism experience arm of the business and are tour guides and serving staff when there are tours or there is a venue hire event.

An estimate of more than 20 people benefit during the tours and when there is a venue hire event. During the tours, a woman representative from HART housing sells handicrafts on behalf of their organisation. Additionally, during events, some cut flowers growers provide catering options.



Challenges

Some of the current challenges identified by the company include:

- ▶ Acquiring building materials, especially in a timely manner
- ▶ Coping with extreme weather events such as cyclones and floods.
- ▶ Reaching target customers and niche markets
- ▶ Securing contracts with wholesalers
- ▶ Securing finance



3.2 Tonga situational analysis

As a tourist destination, Tonga was ranked ninth out of the fifteen countries in the Pacific, trailing well behind neighbours Fiji, Samoa, Vanuatu and the Cook Islands. Although there is increasing recognition of tourism's potential, Tonga's visitor arrival numbers are relatively stagnant. Its visitor growth has been underperforming for the past 15 years, with a less than 3% market share in the South Pacific in 2011 (Tonga Tourism Sector Roadmap [TTSR], 2013).

Table 2 illustrates the numbers of visitors received by Tonga in 2017 including the number of visitors from Tonga's two largest markets. New Zealand is the largest tourist market for Tonga.

Table 2: Tonga visitor arrivals

2017	TOTAL	AUS	NZ
Visitors	58,783	12,646	28,873

Source: SPTO Resource Centre website

The main purpose of visit is to holiday, followed by Visiting Friends and Relatives. Additionally, the majority of these visitors are in the 50-54 years age group (TTRS, 2013).

In 2019, the direct contribution of travel and tourism to GDP in Tonga amounted to TOP120 million (US\$52.6 million) or 12.1% and a total of 5,100 jobs (12.8%) were directly supported by the industry (WTTC 2020b).

Tonga's 'holiday' visitor numbers peak between June and October, coinciding with the whale watching season. The 'visiting friends and relatives' market peaks during Australia and New Zealand's school breaks over the Christmas holidays. The average visitor stay in Tonga is between seven to ten days.

For international visitors, the most popular activity is whale watching/swimming, this is followed by diving, snorkeling, kayaking and learning about the history of the Kingdom.

As part of Tonga's strategy to achieve its tourism potential, the Kingdom developed the Tonga Tourism Sector Roadmap 2014-2018 (TTSR), which 'outlines the requirements to facilitate a prioritised and coordinated approach to the development of the tourism in Tonga' (TTSR 2013, p. ii). With a timeline of five years, the TTSR focused on the short to medium term measures to build a stronger and sustainable tourism sector. Under the roadmap, the first objective for the sector states that tourism should be the main source of income for Tongans, generating TOP100 million for the economy (TTSR 2013, p. ii).

The agritourism experiences sector in Tonga is still in its infancy, although one operator, 'Ene'io Botanical Gardens, based on the main island Utu Vava'u in the Vava'u group, has been in operation for over a decade. The experience offers guided tours of a fruit trees, plants - both native and introduced species to Tonga.



Strengths

1. Though small, Tonga's agricultural sector thrives, hence there is an opportunity to open up these farms for visits and or tours especially to visiting friends and relatives. Many in this market are wanting to reconnect to where their food comes from.
2. The Government's support to strengthen its tourism sector, through the Tonga Tourism Sector Roadmap, has highlighted sectors within the industry which could be strengthened. This is again an opportunity for such experiences to be explored and assisted.

Weaknesses and constraints

1. The low visitor arrivals to Tonga has resulted in a weak tourism sector, making operating a tourism business challenging and difficult. There is low investment from foreigners and poor infrastructure, key elements to a vibrant tourism sector.
2. Tonga's remote geographical location and limited air and sea connections are a disadvantage particularly for its main source markets of New Zealand and Australia, and in the face of stiff competition from Pacific neighbours, such as Samoa and Fiji.
3. The enabling environment is not conducive for the sustainability of small and medium sized operations, especially with regard to regulations and processes for licensing, which inhibit investment (TTSR 2013).
4. A significant constraint is the Sunday Observance Act, which does not allow businesses, including services (such as restaurants and transport) to operate on Sundays. This is a significant constraint to the destination's attractiveness and the industry's profitability (TTSR 2013).
5. Financial institutions' requirement for collateral and security and their stringent processes make accessing finance for start-up through the formal financial networks difficult for SMEs.
6. There is poor understanding of international tourist requirements and expectations by locals (local government, community leaders, entrepreneurs and smallholders).
7. There is limited ability and confidence among farmers to communicate their stories around traditional farming systems, culture and knowledge in ways which are interesting to tourists.
8. Despite potential, there is limited development of agritourism experiences (accommodation and restaurants using exclusively local food), agritourist hubs, tours of agribusinesses, farms (including forest farms, agroforests, aquaculture farms, nature's pharmacies, or pearl farms).



Opportunities

1. Greater collaboration between stakeholders in prioritising actions highlighted in TTSR to stimulate growth in visitor arrivals is possible, as well as to introduce new activities, such as agritourism experiences. This could include clear guidelines and standards in support of development of farm or village stays.
2. The lack of tour products on the main tourist islands of Tongatapu, Vava'u, Ha'apai and 'Eua provides a great opportunity for agritourism experiences on these islands to thrive, in an environment of limited competition. Having products available in the islands where whale watching is the most popular activity, such as Vava'u, can support longer stays by visitors.
3. Enhancing the enabling environment (policy, legal business, infrastructure) and policy incentives. The government has revised some of its processes for starting up a business which has had positive results on potential business owners (TTSR 2013).
4. Resorts and restaurants are mainly supplied by locally grown and produced foods. Capacity building for farmers, procurement officers and chefs is needed to promote the importance of local food in their value chains. (Farmer training, chef training; farm to table value chain training; farmer to farmer learning).
5. Better marketing by tourism bodies, including the promotion of the uniqueness of the Tongan culture and farming systems could support an emerging agritourism sector (with clear links to climate change adaptation, rural development, protection of culture). This should also include better development of branded and packaged value-added primary produce as gifts for the carry-on tourist export market.
6. Tapping into the local indigenous traditional knowledge and agrobiodiversity for tourism purposes also makes it more accessible for the younger generation. This could be further enhanced with development of a national recognition/award system, for traditional crops such as yams which could help spark innovation amongst youths, women and communities. All these could be showcased as part of an agritourism experience.

Threats

1. Tonga has a combination of high volcanic islands and low coral atolls, making its group of islands vulnerable to natural disasters and climate change. In recent years from 2012, Tonga has experienced several severe tropical cyclones such as TC Evan in 2012, TC Ian in 2014, TC Gita in 2018 and TC Tino and TC Harold in early 2020.
2. There is significant competition from other Pacific island neighbours – in particular Fiji and French Polynesia as holiday destinations and Vanuatu for agritourism experience products.



3. The impact of global events such as economic downturns, climatic disasters, foreign exchange rate fluctuations and most recently COVID-19, has crippled popular tourism destinations, airlines and financial insecurities of potential tourists.
4. There are poor transport links, including lack of coordination between international and national flights. In addition to often unsatisfactory inter-island transport options, expensive domestic flights, infrequent and unreliable ferry services, travel can also be time consuming and uncomfortable.
5. There is an absence of strategic guidance and standards leading to poor quality offerings. These often lead to feelings of overpricing and unsatisfactory experiences, leading to bad reviews on Tripadvisor and in social media.
6. The core farming business can be neglected as a result of catering to tourist visitors.

Recommendations

1. The Tongan tourism ministry should collaborate with other ministries and the private sector to identify ways they can combine resources, ideas and guidance for the benefit of its tourism industry. For example, the agricultural sector, national planning, finance, banks, agricultural exporters, hoteliers and inbound operators need a common goal.
2. An agritourism task force should be created with stakeholders from the private and public sectors to map out strategies on guidelines and standards. It is crucial to get this right, especially to interested farmers.
3. Dialogue sessions should be held between all stakeholders to map out the direction of Tonga's agritourism experiences.
4. The TTSR identifies the need to develop the yachting industry, especially the super yacht industry, which involves high yielding visitors and stays for longer periods. This requires putting in infrastructure to entice this market to the islands.
5. Government should continue to streamline processes for investment and business start-ups for ease of doing business. Additionally, more dialogue with financial institutions to review lending policies to encourage flexibility to enable ordinary farmers to access loans.



Case study: 'Ene'io Botanical Gardens



Business summary

'Ene'io Botanical Gardens is the brainchild of a retired civil servant and agriculturalist, Haniteli Fa'anunu, of Tonga. He started work on a 22 acre piece of land in 1972, almost as soon as he started his career. The Gardens is home to 527 plant species and over 107 plant families.

Fa'anunu was motivated by a desire to conserve the native flora of Tonga, introduce exotic and economically important species, to create a seed bank for future biodiversity, and to educate local Tongans and visitors alike.

The limited liability company is based out of Vava'u Island, Tonga and opened its garden gates to the public in 2006. It is currently the only botanical garden in Tonga.



Agritourism experience products

The company's core business is garden tours. There are three types of tours around the botanical garden and these are:

- 1) Walk amongst the native trees tour
- 2) Bird watching and hiking tour
- 3) Polynesian Cultural Tour

Day tours around the island are also available, upon request.

The tours cost between \$50-100 Tonga Pa'anga per person. Discounts are also available upon request. There are no tours on Sundays.

Part of the tours include demonstrations of preparing pandanas leaves for weaving, extracting vanilla essence, tapa making, nonu juice processing and the many uses of coconuts. There is also the Ene'io Beach Bar and Restaurant on site, which prepares Tongan feasts of local delicacies, on Sundays.



Visitor profile

'Ene'io Botanical Gardens receives an average of 3,000 visitors annually. These visitors are from Australia, China, New Zealand and locals. Visitors include couples, corporate groups, families and free independent travellers.



Sales and marketing

The company currently uses two selling channels involving partnerships with inbound tour operators and cruise ships. The business hopes to expand its sales channels into;

- ▶ Direct sales via website bookings
- ▶ Online booking platforms such as Viator
- ▶ Partnerships with niche overseas travel agents and hotels and other operators.



Revenue

The tours earn two-thirds of the total revenue of the business, whilst sales of vegetables and revenue from the restaurant and bar bring in the remaining third.



People

The company has a total of four staff members, of which one is female. Two staff, a male and female work specifically on the agritourism experience. Close to 1,000 individuals financially benefit from 'Ene'io Botanical Gardens. These individuals are farmers and community members.



Challenges

Some of the challenges identified by the Garden's include:

- ▶ Acquiring building materials
- ▶ Branding and promotion
- ▶ Communication from its isolated location
- ▶ Securing finance
- ▶ Reaching target customers and niche markets
- ▶ Recruiting and training appropriate staff



3.3 Vanuatu situational analysis

The economy of Vanuatu is primarily based on tourism and agriculture, with coconut oil, copra, kava and beef being the high export earners, making up for more than 75% of the country's exports. The International Visitor Survey report for 2017 indicated, the total number of international visitors by air to Vanuatu was 109,108 while cruise ship passengers accounted for 223,551. In 2017, Australian visitors totalled 52.5% (57,384), New Caledonia with 14.5% (15,826), New Zealand reeling 10.5% (11,554), other Pacific Countries at 6.5% (7,147) and Europe on 6.2% (6,801). The average length of stay for these visitors is 11.4 days (IVS, 2017).

Vanuatu is a popular cruise destination. This is reflected in its visitor arrivals, where the number of cruise visitors is almost double those arriving by air (SPTO, 2019). From 2015 to 2017, cruise passengers' numbers totalled 675,511 whereas air travellers amounted to 294,177 visitors (SPTO, 2019). This market has been consistently strong over the past four years. An IFC report suggested that in 2013, a total of AU\$34.6million was raised from cruise tourism (IFC, 2014). With passengers on average spending AU\$96 per day in Port Vila, AU\$45 in Luganville and AU\$11 on Mystery Island. Port Vila receives the greatest percentage of visitors' expenditure, as a result of well-developed tours and shopping opportunities (IFC, 2014). However, there is little detail as to the leakage from cruise tourism revenue as the larger cruise companies operating in Vanuatu make it extremely difficult to administer in-depth analysis of tourism spend.

Some fieldwork that has been undertaken at a number of ports of call in Vanuatu showing that "despite the prominence of cruise tourism at these sites, advancements in health, education and housing have been subdued". Aaron & Aaron (2011) have raised questions concerning who the beneficiaries of cruise tourism have been in these ports of calls. "Additionally, transparency of their activities is extremely limited and the veracity of what is known about their broader impacts is difficult to substantiate given the paucity of independent external assessments" (Cheer, 2017, p. 410).

Over 18% of the GDP and 14.4% of formal employment is gained directly from the tourism industry (WTTC, 2018). However, the distribution of spend to the outer islands is still very limited with most of the profits going to foreign tourism businesses located in Port Vila (Scheyvens and Russell, 2009).

The foreign domination of the tourism sector in combination with the lack of backward linkages between traditional landholders and the wider tourism sector have resulted in few opportunities for locals to benefit from the increasing number of tourist arrivals. Vanuatu's Agritourism Strategy and Action Plan 2017 identifies that at least 54% of food at resorts around Port Vila is imported. It is also estimated that only 5% of items sold at the Port Vila cruise port are locally-made with the remainder being imported goods. The Vanuatu Sustainable Tourism Policy (2019-2030) has outlaid measures to address this such dedicated market places for locally made goods only.



Currently, the greatest benefit rural landholders could gain from the tourism industry is from supplying more fresh produce to service the mainstream tourism market. Vanuatu's tourism sector imports much food that could be grown and supplied domestically. Many factors limit the opportunities for local landholders to capitalise on these and other opportunities and further research is needed to strengthen linkages between local landholders and the tourism industry.

Tourism policies in Vanuatu encourage the incorporation of local cuisine into tourism offerings and facilitate stronger integration of smallholder farmers and their communities into the tourism economy.

The National Sustainable Development Plan (2016-2030) promotes dialogue around the protection and enhancement of traditional agricultural practices, focusing on disaster risk reduction and climate change adaptation. Traditional agricultural (smallholder farming) and cultural land management systems are 'vehicles for food security, housing, widespread employment, social security, biodiversity protection and ecological stability; they are also a store of natural medicines, as well as a source of social cohesion, inclusion and cultural reproduction'. A key challenge for Vanuatu is developing models that allow for increased income while continuing to support social support networks, reciprocal networks of exchange, environmental sustainability and food security (Addinsall et al., 2016). Once such avenue is to recognise traditional agricultural systems through the FAO "Globally Important Agricultural Heritage Systems (GIAHS) Program which aims to identify ways to mitigate the threats faced by the farmers as well as enhance the benefits derived from these systems. Through the GIAHS smallholder farmers practicing traditional farming systems can receive: technical assistance; boost understanding of the value of keeping alive sustainable agricultural knowledge; and promote agricultural products, agroecological tourism and other incentive mechanisms and market opportunities.

The International Visitors Survey (2016) shows that visitors to Vanuatu are increasingly looking for opportunities to immerse themselves in the local culture and environment as a key motivation for their visit. In response to the International Visitors survey, the Vanuatu Tourism Organisation has adapted its branding and marketing campaign to "Answer the call of Vanuatu" suggesting it is more than just a campaign, it's an attempt to improve the visitor experience. This provides an opponent time for the growth of niche markets based on transformative and regenerative experiences run by smaller local Ni Vanuatu operators in the outer islands and rural areas of Vanuatu.



The Vanuatu Sustainable Tourism Policy (2019-2030) responds to lack of profit distribution and puts forward goals and objectives that advocate for a shift beyond economic rationalisation and GDP as a measurement of tourism's contribution to development in Vanuatu. These goals and objectives are based on a human centred approach to tourism that places Ni Vanuatu people, their culture and environment at the centre. The policy demonstrates how research, policy-making and planning can harness traditional values and knowledge systems to build resilience and support the journey to sustainable, transformative and regenerative tourism through increased Government regulation.

For example, Goal 4 of the policy recommends that sustainable and responsible tourism products and services are developed, supported, and marketed to attract responsible high-value tourists. Objective 3 states: The tourism industry in Vanuatu provides and supports sustainable, ethical, local products, experiences and agricultural produce and Objective 4 states: Increase the linkages between the agriculture, handicrafts and tourism sectors to increase the benefits of tourism to a broader range of stakeholders.

The development of local products for sale to tourists provides benefits across the tourism industry by increasing spending by tourists, defining a unique local experience, and supporting local operators including marginalised groups. Lapita Café Ltd is a key example of a local Ni Vanuatu intermediary involved in agritourism. The organisation supplies local value-added products (predominantly purchased from rural Ni Vanuatu female farmers) to resorts, hotels, national airports and supermarkets. Lapita Café Ltd is looking to develop an agritourism experience educating tourists on traditional foods and how the purchasing of these products is supporting livelihoods, in particular for women.

ACTIV Association, a French NGO and project partner in Vanuatu is making real gains in promoting local produce to tourists. ACTIV Association is also playing a pivotal role in supporting nearby farmers to adopt agroforestry systems. Produce is sold back to ACTIV where local female contractors of ACTIV value add the products. ACTIV sells produce to tourists at various markets within the country but has taken the link between agroforestry and tourism further. ACTIV is now establishing an agritourism tour where tourists visit local agroforestry farms before returning to ACTIV's centre to purchase local herbs and spices, handicrafts, coffee and chocolate (Addinsall & Nelson, 2019).

The Vanuatu Department of Tourism is demonstrating a commitment to the development of agritourism experiences and value-added products and is working in collaboration with the Department of Industry and Agriculture to improve the quality, consistency and overall reliability of supply from local producers as a national priority.



Strengths

1. The Vanuatu government is committed to the development of agritourism niche products through its Vanuatu Agritourism Plan of Action. This document provides a framework for enhanced integration of tourism and the productive sectors including agriculture, fisheries and livestock. One of its focal areas is agritourism attractions and tours.
2. The uniqueness of traditional agricultural (smallholder farming) and cultural land management systems makes them suitable for recognition as FAO “Globally Important Agricultural Heritage Systems” (GIAHS), thus providing global exposure and potential to develop agroecological tourism farm stays.
3. The decentralised nature of tourism management in Vanuatu enables provincial Governments to develop strategies based on rural agritourism offerings.
4. The regular cruise ship visits provide potential for visitors to engage in these experiences, when positioned near port of calls and marketed well as well as a market for value added agritourism products.
5. A growing demand for authentic, transformative and regenerative tourism experiences.
6. Increasing exposure of local Pacific cuisine and value added products through pacific cooking shows and cook books, media, and push to use more local produce in Government policy.

Weaknesses and constraints

1. Low profile in the marketplace. Generally many agritourism businesses do not gain much marketing exposure.
2. There is limited capacity to scale up. Most of the operations are small and medium businesses and are typically constrained with access to finance, skills development and investment in new technology and marketing.
3. The lack of critical mass. All of the agritourism experiences in Vanuatu are small businesses and operate independently.
4. Remoteness from markets. Many rural smallholder farmers are not located in close proximity to tourism markets making it difficult to develop farm tours as well as supply produce to the tourism industry.
5. Lack of integration with the cruise tourism industry. Although Vanuatu has consistent arrivals of cruise ships, the majority of tourists book pre-paid tours, sold on the cruise ship, which must be insured therefore limiting many local Ni Vanuatu SMEs.



Opportunities

1. Integrate agritourism strengths and benefits into Vanuatu destination marketing. This should involve familiarisation trips for the local authorities and inbound operators to list these operators in their main marketing channels.
2. Strengthen market access to provincial travel and booking centres, online travel agents and international wholesalers. Develop a database of agritourism products from various provinces and use the tourism officers for updates and other liaising purposes.
3. Provide skill development through a partnership between the Vanuatu Skills Partnership, Ministry of Education and Training and the Vanuatu Department of Tourism on visitor management, product development and business management to those individuals who seek to explore this niche product. Getting it right the first time will help prevent bad experiences which turn to bad reviews that are detrimental to SMEs⁷.
4. Provision of a financing scheme and micro-financing by the financial institutions for SMEs. This requires government dialogue with banks and other financial institutions to review its terms of lending rates and strict procedures, that are 'friendlier' to small operators.
5. Facilitate increased collaboration between agritourism SMEs, larger private sector representatives and interested partner donors.

Threats

1. Adverse weather conditions and climate changes. Vanuatu has been affected by some severe cyclones in recent years including Tropical Cyclone Pam in 2015 and Tropical Cyclone Harold in 2020, which they are still rebuilding from.
2. Competition from other countries in the South Pacific region as a holiday destination.
3. Overpricing and poor quality of product due to lack of training and understanding of tourist needs. The Vanuatu International Visitor Survey found 12% of people identified food and beverage as one of the least enjoyable parts of their visit to Vanuatu. This indicates a need to further improve food services. It is implied from the survey that this also includes the quality and quantity of local produce consumed by visitors.
4. Neglect of the core farming business as a result of catering to tourist visitors and enquiries.
5. Lack of understanding of the market and competition (especially from other countries and tourist destinations).
6. The lack of safety standards and procedures, especially if these products are in remote rural areas. These are especially important in the COVID-era.

⁷ Through the work of this skills-for-tourism initiative in 2018, 63% of the local tourism businesses supported had managed to obtain tourism operator permits, compared with 43% in 2017.



7. Tropical diseases which are common and associated with farms and in the tropics. These include malaria, dengue fever, leptospirosis which can be debilitating or deadly if visitors do not take proper precautions.

Recommendations

1. Strengthen sector linkages: by increasing linkages between rural smallholder farmers and the tourism sector.
2. Recognise the uniqueness of traditional agricultural (smallholder farming) and cultural land management systems: apply for FAO "Globally Important Agricultural Heritage Systems (GIAHS).
3. Diversification of rural smallholders: to incorporate farm stays and agroecological tours of Traditional farming systems. Provide microfinance and skill training to potential farmers who wish to explore this niche.
4. Agritourism value addition: enhanced value added agritourism products that are certified organic and provide tourists the opportunity to try local foods.
5. Strengthen linkages for agritourism businesses to the cruise market: the Vanuatu Department of Tourism to ensure local agritourism SMEs have access to cruise passengers through the on board tour sales.
6. Strengthen the linkages between agritourism SMEs and other stakeholders: by facilitating increased collaboration between agritourism SMEs, larger private sector representatives and interested partner donors.
7. Undertake targeted agritourism market research: to address the lack of reliable data on the economic impact of agritourism attractions.
8. Re-establish the Vanuatu Agritourism Steering Committee: to ensure coordination across the public and private sectors and to investigate the provision of a micro-financing scheme for local Ni Vanuatu agritourism SMEs.



Case study : Freshwater Plantation



Business summary

Freshwater Plantation advanced from a derelict coffee and cocoa plantation when new owners purchased this area of land in 2013. The agritourism venture opened to the public in 2016, after some restoration work on the plantation and its structures were completed.

With an area mass of 100 hectares, an area of the property is home of the Aore Island Bat Cave, which is now a preserved area. It is the habitat of a protected species of microbat, native to Vanuatu.

The plantation is also the source of Vanuatu's Organic Aore Island chocolate by award winning Aelan Chocolate.

This limited liability company is based on Aore, Espiritu Santo in Vanuatu.



Agritourism experience products

Freshwater Plantation's core business is a two-hour guided day tour of the 300 acre cocoa plantation and bat caves. The tour provides a unique interpretive experience of growing, fermenting and drying cocoa ready to be made into chocolate. The tour cost ranges from 2501 to 5500 Vanuatu Vatu. Discounts are also available upon requests for children and groups.

Other products offered at Plantation include food and beverage from its licensed bar and restaurant at the Plantation House Restaurant. Accommodation available from its bungalow and guest room. There is also a massage and day spa facility. They also offer transfers from and to the airport.



Visitor profile

An average of 360 visitors visit Freshwater Plantation annually. These visitors are predominantly from Australia, New Zealand. The domestic market also visits the Plantation including travellers from New Caledonia. Most of these travellers are couples, families and free independent travellers.



Sales and marketing

The Plantation actively uses the following channels to sell their experience:

- ▶ Direct sales via enquiries and bookings directly on their website, in addition to word of mouth and through social media.
- ▶ Partnerships with hotels and other companies.

It hopes to expand by partnering with cruise ship operators.



Revenue

The agritourism experience, which are the tours, makes 50% of the revenue of the business. The other services offered – restaurant, lodging and day spa make up the other 50%.



People

Freshwater Plantation has a staff of 13 employees, four of which are women. These same staff members work in the agritourism experience operation. They estimate a total of 20 other community members benefit from their operation.



Challenges

Two current major challenges faced by the Plantation are recruiting and training appropriate staff, and coping with extreme weather such as cyclones.



Annex 1: Interview instrument – online survey questionnaire

Lesser galangal, valued for its sweet spicy flavor and aromatic scent, at
Waimakare Forest Farm. Photo: First Fighter Productions.



- ▶ What is your first name?
- ▶ And your last name?
- ▶ What is your email address?
- ▶ And your mobile number?
- ▶ What is your position?
- ▶ What business or trading name do your AgriTourism Experiences operate under?
- ▶ What year did the AgriTourism Experience start trading?
- ▶ What is the legal structure of your AgriTourism Experience?
- ▶ Does your AgriTourism Experience have a website? If so please provide your link.
- ▶ Which country does your AgriTourism Experience operate?
- ▶ Which of Fiji's travel destinations does your AgriTourism Experience operate within?
- ▶ On average, how much do you charge (per/person, per/day) for your experience(s)?
- ▶ Do you offer tiered pricing and/or discounts for children, seniors or groups?
- ▶ How many different types of AgriTourism Experiences do you offer?
- ▶ Thank you. Please describe your AgriTourism Experience(s), what do you offer?
- ▶ In addition to your core offering, do you offer any additional paid add-ons?
- ▶ What kind of paid add-ons do you offer?



- ▶ What channels are you currently selling through?
- ▶ Are you actively pursuing and/or planning to expand your selling channels in the future?
- ▶ Which selling channels are you hoping to expand into?
- ▶ Where are your visitors predominantly from?
- ▶ And what type of travellers are you currently attracting?
- ▶ On average, how many visitors do you receive per year?
- ▶ What percentage of your total revenue is currently derived from AgriTourism Experiences?
- ▶ Can you please provide more detail on the revenue percentage you've nominated?
- ▶ How many people does your business employ?
- ▶ And of these employees, what percentage are women?
- ▶ Now, how many employees work on your AgriTourism Experience?
- ▶ And of these agritourism employees, what percentage are women?
- ▶ Approximately how many people are financially benefiting from your Agritourism Experiences?
For example, farmers, community members etc?
- ▶ Have you experienced any of the following challenges?
- ▶ Have you received any technical or financial support from the government, an NGO, a development project or other?
- ▶ Please confirm you provide consent for us to use the information you have provided as data for the PARDI2 AgriTourism Experience Scoping Study and the IFC Fiji Tourism Project, including but not limited to associated publications and resources.





Annex 2: List of agritourism operators

Bee-autiful! Up close and personal at Waitika Farm. Photo: Jean Tikaram.



The following is a list of agritourism experience operators in Fiji, Tonga & Vanuatu, identified during the course of this research. This is not a complete list of relevant operators.

Fiji

Name	Products	Contact
Bobo's Farm, Ovalau	Accommodation Garden tours Hiking and forest tours	bobosfarm.com
Bulaccino Organic Farm, Nadi	Organic farm visit Organic farm guided tour	bulaccino.com Facebook: Bulaccino
Cacao (Fiji) & Vanua Chocolate, Nadi	Chocolate factory tour – overview of craft chocolate Cocoa farm tour	vanuachocolate.com Facebook: Vanua Chocolate
Cegu Valley Farm, Labasa	Educational tours, culling livestock, making compost, VCO	ceguvalleyfarm.com Facebook: Cegu Valley Farm
Epi's Tours, Ovalau	Guided tour of Ovalau island's wild foods and medicinal plants Hiking	epistours@gmail.com latitudefiji@gmail.com
Essence of Fiji Group, Nadi	Skin care retail Factory tours Village tours of where natural ingredients are sourced	essencegroupfiji.com Facebook: Essence of Fiji Group
Flavours of Fiji Cooking School, Denarau, Nadi	Local cuisine cooking classes Market tours Coconut cracking and scrapping demos	flavoursoffiji.com Facebook: Flavours of Fiji Cooking School
Flora Tropica Gardens, Savusavu	Garden tours	floratropica.com
Gaiatree Sanctuary, Taveuni	Organic spice plantation tour Spice of life superfood tour	Facebook: Gaiatree Sanctuary
KokoMana Fiji, Savusavu	'Tree to bar' tours of the cocoa farm and chocolate factory Agroforestry demonstration and how it supports biodiversity	kokomanafiji.com/ Facebook: KokoMana
Nabogiono Farms, Taveuni	Integrated farming tour – fruits & medicinal plants Bird watching in native forest	Facebook: Nabogiono Farms Taveuni
Namosi Eco Retreat, Namosi	Accommodation in traditional houses Farm tours and hands-on planting Gathering food from farm, forests and rivers	namosieco.com Facebook: Namosi Eco Retreat
South Sea Orchids, Nadi	Tour of home and orchid gardens Events venue	Facebook: South Sea Orchids



Name	Products	Contact
Spices of Fiji, Wainadoi	Guided spice farm tours Discussion on the history of Fiji Kava ceremony	
Teitei Homestay, Sigatoka	Permaculture farm tour VCO, Soap & Chocolate making	Facebook: Teitei Homestay Fiji
The Beehive Resort, Rakiraki	Accommodation Apiary tours Bee keeping training	thebeehivefiji.com Facebook: The Beehive Fiji
The Fiji Orchid, Saweni	Luxury accommodation Farm to fork experience in their restaurant Coconut husking, cracking & scrapping demo The Fiji Rum story – sugar cane industry history and rum cocktail	fijiorchid.com Facebook: The Fiji Orchid
Tukuni, Lautoka	Restaurant offering organic food Organic Garden & traditional plants tours	friendfiji.com/tukuni-restaurant/ Facebook: Tukuni
Vee's Organic Farm, Nadi	Honey Skin creams Farm tour	veesorganicfarm.com Facebook: Vee's Organic Farm
Waimakare Forest Farm, Suva	Guided forest tour of native medicinal plants	waimakare.com Facebook: Waimakare Forest Farm
Waitika Farm Fiji, Rakiraki	Guided beekeeping tour Various honey products Refreshments	Facebook: Waitika Farm Fiji



Tonga

Name	Products	Contact
Ancient Tonga, Nukualofa	Cultural tours Lessons – weaving, tapa making & traditional dancing Cultural feast on local produce Medicinal plant tours	ancienttonga.com Facebook: Ancient Tonga
Ene'io Botanical Garden, Vava'u Island	Walk amongst the Native Tour Bird watching & hiking Polynesian Cultural Tour	Facebook: 'Ene'io Botanical Garden, Vavau, Tonga

Vanuatu

Name	Products	Contact
Activ Association, Port Vila	Chocolate-making tour and shop	activassociation.org/
Eden on the River, Efate	Guided botanical garden tour	edenvanuatu.com Facebook: Eden on the River
FANSA Farm Io'cool Foodie Tours	Guided fruits/local food plantation tour	Facebook: FANSA Food Tours
Freshwater Plantation, Luganville	2 hrs guided tour om 300 acres of cocoa plantation & bat caves Accommodation Restaurant & bar	Facebook: Freshwater Plantation
Lapita Café Limited, Port Vila & Lapita Lodge, Luganville	Processed local root vegetables, nuts & fruits Café serving local foods Accommodation	lapitavanuatu.com Facebook: Lapita Café
Tanna Coffee Central, Port Vila	Tanna Coffee Central Roasting, Processing & Packaging facility tour Retail health, beauty & skin products from locally grown ingredients	tannacoffee.com Facebook: Tanna Coffee Central Tanna Coffee
Tree of Life Tour, Luganville	Farm tour, coconut palm and nut talk	santo.travel/tree-of-life-tour

A man with glasses and a blue patterned shirt is smiling as he pours melted chocolate from a large stainless steel bowl into a pot. The pot is sitting on a blue base. In the background, there is a poster on a wall.

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Chocolate tasting at KokoMana. Photo: Ian Markham, Wild Hope Collective.



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PARDI2