

# Sink or Swim: Developing & Promoting Sustainable Nature-Based Tourism in the Coral Triangle

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# Sustainable nature-based tourism in the Coral Triangle



*Developing and Promoting Sustainable Nature-based Tourism in the Coral Triangle* is an Australian Government funded initiative implemented by WWF.

It aims to assist the six countries of the CTI-CFF to develop a long-term approach to more sustainable tourism in the region.



# Sustainable nature-based tourism in the Coral Triangle

## AIMS OF THE INITIATIVE

- Promote world class, high quality visitor experiences
- Increase the value of tourism to local, regional and national economies
- Enhance the role of marine protected areas in local communities and for supporting sustainable livelihoods
- Build support for protecting our natural and cultural assets, in particular the marine and coastal resources of the Coral Triangle

## PROJECT TEAM



# Sustainable nature-based tourism in the Coral Triangle

Sustainable tourism can contribute to conserving the Coral Triangle's coastal and marine resources and to ensuring food security and livelihoods for millions of people in the region. It provides an opportunity to harness a dynamic industry to preserve one of the world's most unique ecosystems and areas of high conservation value.



## BENEFITS

- Partnership between tourism and conservation to support local communities by enabling sustainable livelihoods
- Improved protection of marine and coastal resources by providing incentives for conservation (rather than exploitation)
- Achieve greater awareness and cut-through in a competitive global tourism market

## Sustainable nature-based tourism in the Coral Triangle

Nature-based and adventure tourism are growing annually by 10-30%, currently accounting for up to 25% of the world's tourist market (UNWTO). This growing demand provides an incentive to move away from mass-based tourism. However, tourism, if left unchecked, can compromise the sustainability of the Coral Triangle's finite coastal and marine resources and negatively impact local culture.

## Economic opportunity – forecast to 2035 – baseline analysis

REGION/ SCALE	Estimated Value in 2015			Adjusted Forecast to 2035*				
	Total Tourism Market (US\$)	Nature-based & Adventure Tourism		Total Tourism Market (US\$)	Nature-based & Adventure Tourism			
		15% Share (US\$)	25% Share (US\$)		Share (%)	Value (US \$)	Share (%)	Value (US \$)
<b>Coral Triangle</b>	\$98.7 billion	\$14.8 billion	\$ 24.7 billion	\$454.3 billion	27%	\$122.7 billion	33%	\$148.3 billion
<b>Timor-Leste</b>	\$57 million (Intl. only)	\$8.6 million	\$14.3 million	Est. \$300 million (No current Data)	70%	\$210 million	80%	\$240 million
<b>Solomon Islands</b>	\$97.4 million	\$14.6 million	\$24.3 million	\$420 million	55%	\$231 million	65%	\$273 million
<b>Papua New Guinea</b>	\$496 million	\$74.4 million	\$124 million	\$2.1 billion	60%	\$1.3 billion	70%	\$1.5 billion
<b>Philippines</b>	\$26.1 billion	\$3.9 billion	\$5.22 billion	\$53.9 billion	40%	\$21.6 billion	50%	\$27.0 billion
<b>Indonesia</b>	\$47 billion	\$7.1 billion	\$11.8 billion	\$212.1 billion	25%	\$53.0 billion	30%	\$63.6 billion
<b>Malaysia</b>	\$25 billion	\$3.8 billion	\$6.25 billion	\$185.5 billion	27.5%	\$46.4 billion	32.5%	\$55.7 billion

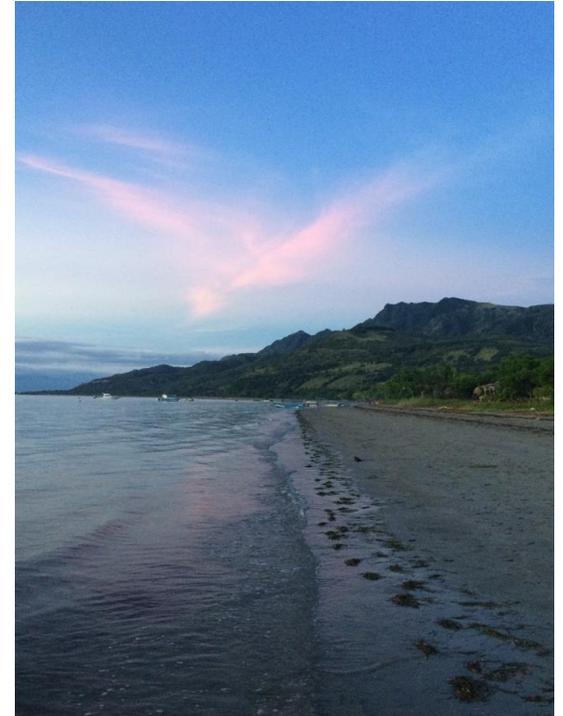
## Observations and insights from the three sites

- Government planning and policy can have a significant influence but communication is not always effective - causes distrust and misinformation
- Coordination between Government, NGOs, community and tourism industry is critical - avoid duplication and ensure a long-term outcome
- Managing expectations of the community:
  - tourism is NOT the panacea
  - not everyone is suited to tourism (be discerning about who gets trained)
  - avoid 'build it and they will come' approach



## Observations and insights from the three sites

- Enabling infrastructure doesn't need to be large scale – some of the most important initiatives will be small scale and focused on managing impacts eg moorings vs new airport terminal
- There has been a lack of focus on experiences
- Communities are most often at a disadvantage in relation to taking the opportunity of tourism due to:
  - Insufficient start-up capital – opportunity for micro-financing
  - Capacity and poor understanding of basic hospitality and safety standards (OH&S + public liability)
  - Lack of access to network for marketing and sales



## Observations and insights from the three sites

- Sustainability and inconsistent use of ‘eco’ – for example, “eco-lodges” that don’t meet basic sustainability standards
  - Capacity building in sustainability across the entire tourism supply chain is required, including food and beverage, waste, house-keeping, transport, etc
- Capacity building often one-off and not reinforced
  - employment pathways, mentoring programs and ongoing support critical
- Low-level of awareness in market – collaboration across Coral Triangle countries will grow awareness + help to increase appeal of the destinations



# Process for developing & promoting sustainable tourism



# Site selection

Site assessment will be undertaken with regard to the following high-level criteria:

1. High-value and well-preserved marine and coastal resources conserved under a community-managed and/or Government-gazetted Marine Protected Area (MPA) or network of protected areas (this may also include wildlife management areas);
2. Engaged community with an interest in supporting or participating in low-impact, sustainable tourism;
3. High-level support from local, regional and national Government, including support from environment, tourism and economic development agencies;
4. Accessibility for visitors, particularly through regular and reliable transport services (air, road or sea) linked to the national capital and/or other regional destinations.

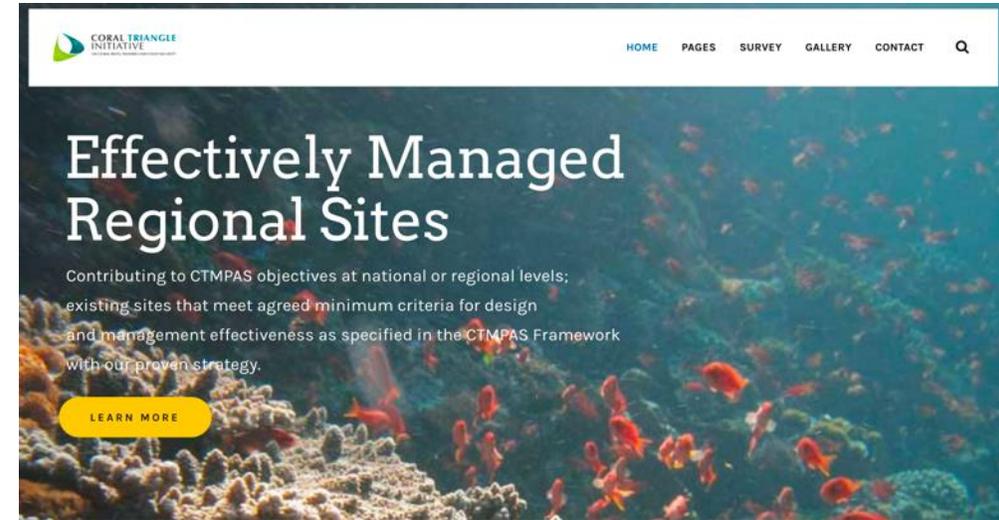


# Site selection – Coral Triangle MPAS (CTMPAS) online tool

To assist with criteria 1, a Coral Triangle MPAS (CTMPAS) online tool has been developed.

The tool is intended to provide clear guidance on whether the **site is of high conservation value and is well preserved**. This is critical given that this project aims to only promote the highest quality and best managed marine and coastal destinations within the Coral Triangle region.

The CTMPAS tool has been developed in consideration of the **Global Sustainable Tourism Council's sustainability guidelines**, which set out the elements required for a destination, product or experience to be economically, environmentally and socially sustainable.



Criteria 1: High-value and well-preserved marine and coastal resources conserved under a community-managed and/or Government-gazetted Marine Protected Area (MPA) or network of protected areas (this may also include wildlife management areas)

# Destination positioning and planning

## ADDRESSING SUPPLY

- Identify the site's unique positioning, which relates to its point of difference. The positioning should also be developed with reference to the broader Coral Triangle tourism brand and the motivations and behaviour of the target market.
- The positioning sets the foundations for the development of a Destination Plan, which identifies the potential signature experiences as well as supporting activities, accommodation and other experiences that will appeal to the target market.
- The Destination Plan will prioritise actions and enablers for investment, from infrastructure requirements to capacity development. It addresses conservation outcomes and sustainable livelihoods as well as involving local communities.



# Destination marketing

## DRIVING DEMAND

- A critical element is to drive demand through promotion of these sites. There is a clear benefit from collaboration rather than each site attempting to promote itself independently.
- A regional brand for the Coral Triangle should be developed for the 'best of the best' – high-quality, low-impact, sustainable nature-based tourism destinations within the region. These sites will appeal to a niche, high-yield market.
- Current opportunity to promote these sites through TheCoralTriangle.com
- Monitoring includes referrals for bookings as well as post-visit reviews and ratings by visitors through Google Analytics or third-party sites, such as TripAdvisor or Booking.com.



# Sustainable nature tourism brand for the Coral Triangle

- The more successful the marketing of the Coral Triangle, the greater the benefit to the communities of the Coral Triangle.
- Collaboration across the 6 CTI-CFF member countries to create a regional brand would:
  - Identify and highlight the point of difference of the Coral Triangle from other global destinations
  - Improve opportunities to achieve cut-through in a highly competitive and growing market
  - Showcase the significance of the Coral Triangle – why it is special and unique



Many achievements, including 6 sites within the Coral Triangle recently recognised in the Top 100 Sustainable Destinations in 2016

# Requirements for a regional CT tourism brand

- Complement and value-add to the existing national tourism brand and strategies in each of the six CTI-CFF countries.
  - Aim is to leverage and ensure linkages between the national tourism plan or strategies and site-specific destination planning and management
- Focus on low-impact, sustainable tourism. It seeks to identify and enable sustainable, nature-based tourism in well managed and protected marine and coastal sites within the Coral Triangle.
- It is not intended to:
  - Compete with national tourism priorities
  - Include all marine or coastal sites across the Coral Triangle or mass tourism destinations



# Encouraging investment in the Coral Triangle

## PREPARING AN INVESTMENT PROSPECTUS

- Enabling infrastructure that facilitates increased and sustainable visitation, enhances accessibility and/or supports tours and activities within the site, including initiatives that support environmental sustainability or mitigate damage to the high conservation values of the site
- Opportunities for private sector investment in new or revitalised visitor experiences or services, for example accommodation and partnerships with local communities
- Destination management and marketing, including packaging & bundling of experiences and accommodation, content creation and promotion
- Training and capacity building initiatives, particularly those aimed at enhancing visitor experiences, hospitality or business skills, especially for community-based organisations



# Encouraging investment in the Coral Triangle

## AUDIENCE FOR THE INVESTMENT PROSPECTUS

- National or Provincial Governments, in particular to enable key priorities to be aligned to or incorporated in national strategies or plans;
- Bilateral or Multilateral Development Partners to enable key priorities to be aligned to or incorporated in development assistance strategies or programs, in particular those relating to the conservation of coastal and marine resources within the Coral Triangle countries, sustainable livelihoods and economic development; and
- Private sector investors who are seeking opportunities to develop and provide high quality, low-impact sustainable marine or nature-based tourism experiences or enterprises within the Coral Triangle region.



The investment prospectus for the first three sites will be completed and made available in early 2017.

# Providing support for growth

A number of tools have been developed:

- CTMPAS online tool - assists with site identification and is based on the Global Sustainable Tourism Council's sustainability guidelines
- Template for destination planning
- TheCoralTriangle.com, which is a not-for-profit enterprise dedicated to the promotion of sustainable tourism in the Coral Triangle – its stories, places and people



**It is envisaged with the support of the CTI-CFF Sustainable Tourism Taskforce, the program can be expanded to cover a range of extraordinary sites to support conservation and sustainable livelihoods across the Coral Triangle region**



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Thank you

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