

CETOP Workshop, October 24-25, 2022

"Rethinking tourism and development in French Polynesia after the pandemic"

Fare pote'e, UPF Presidency



UPF - Center for the Study of Tourism in Oceania and the Pacific (CETOP)

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WiFi ID : WIFI-CONFERENCE

WiFi code: CETOP2022!

Presentation of CETOP: www.cetop.upf.pf

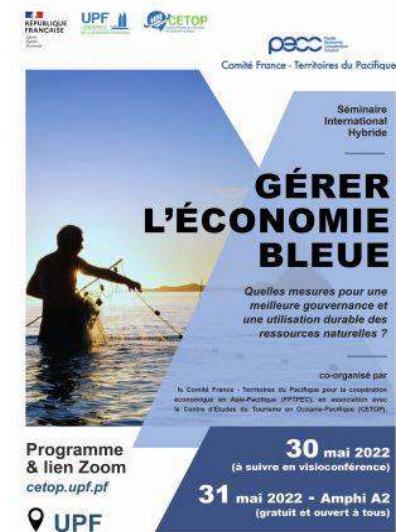
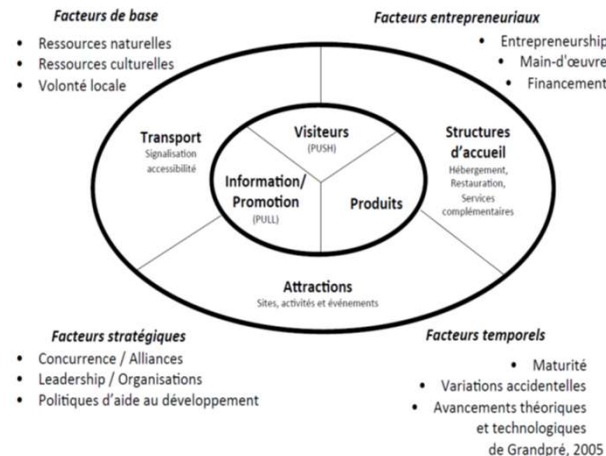
- Created in 2018 with the support of the Ministry of Tourism of FP
- Objective: research program and scientific expertise on tourism development in FP
 - studies, data, tools on tourism in French Polynesia and Oceania
 - annual symposium on the theme of Tourism in Polynesia
 - accompaniment of Polynesian students towards the tourism professions (“Licence Pro MTL”, “Master MCI tourisme”), CMQ, ...
 - participation of researchers from the UPF and experts from other universities (Polynesian triangle, ...)
 - multidisciplinary approach (economics, management sciences, law, sociology, geography, etc.)
 - 3 axes: attractiveness, competitiveness, sustainability of tourism in FP

CETOP: studies and international exchanges



Diagnosis of tourism in French Polynesia with the participation of LP-MTL students (2020)

Modèle touristique régional (MTR)



CETOP: studies and international exchanges

- Participation of CETOP researchers in local and international conferences to present their research work in tourism
- Visiting professors, specialized in tourism research
 - on campus : Jean-Jacques NOWAK, Christophe BENAVENT, Laurent BOTTI, Nicolas PEYPOCH, Sauveur GIANONNI, François DE GRANDPRE, Douglas PEARCE, ...
 - online (2021 due to COVID-19) : Haiyan SONG, Stanislav IVANOV, Maria GRAVARI BARBAS, Marco DELOGU, Bianca BIAGI, Marie DELAPLACE, Erick LEROUX, ...

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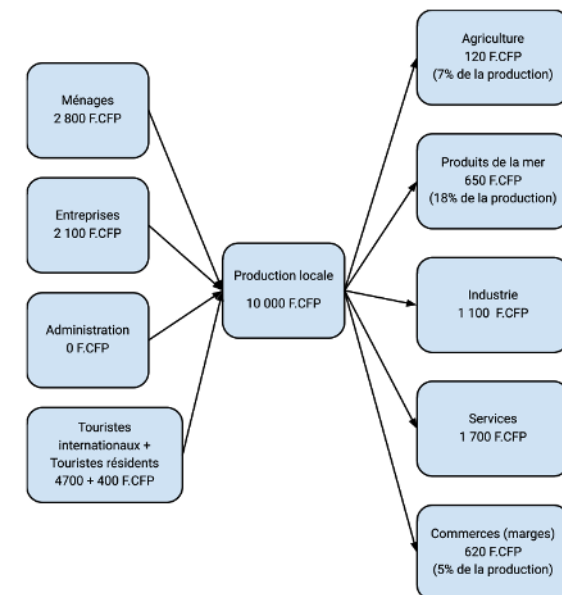


Tourism in French Polynesia : overview

The weight of tourism in the Polynesian economy (2018)

- Spending by foreign and resident tourists = 7.7% of GDP (in 2018)
 - International tourism = 7.3% GDP (48% transport, 43% HR)
 - Local tourism = 0.4% GDP
- Tourism Value Added = about 45% of the tourist expenditure in the transport, hotel and restaurant and personal services sectors
- 5500 salaried jobs directly linked to tourism = 20% of the total wage bill in France (25 billion Fcfp) = 16% of salaried employees (IEOM)
 - 31% of jobs in the Leeward Islands (56% in Bora Bora)
 - 14% of jobs in Tuamotu-Gambier (31% in Rangiroa)
 - 13% of jobs in the Windward Islands (27% in Moorea)
 - 10% of jobs in the Marquesas
 - 7% of jobs in the Austral Islands

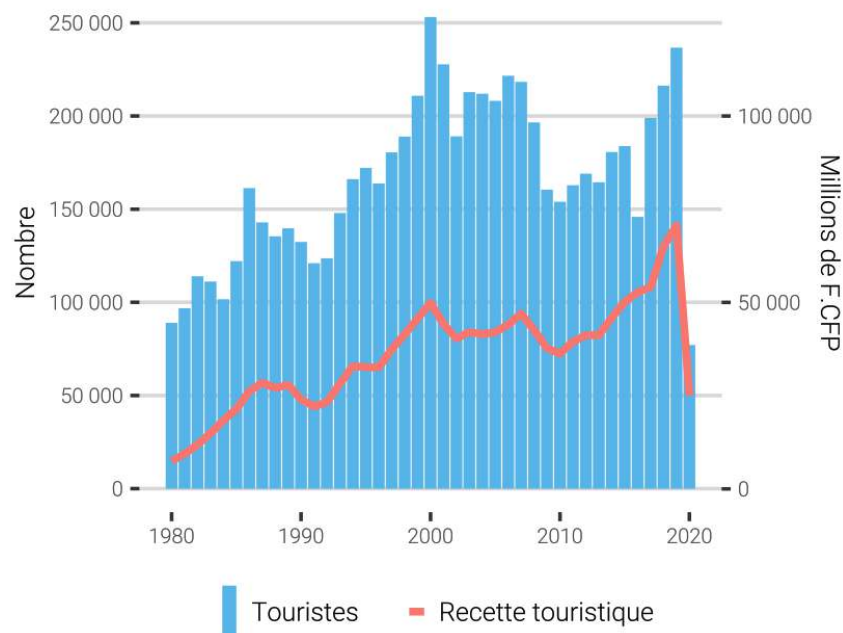
Fig. 1. Circuit des achats de consommation intermédiaire en produits locaux de la branche hôtellerie-restauration (estimation)



Tourism in French Polynesia: 1980-2020

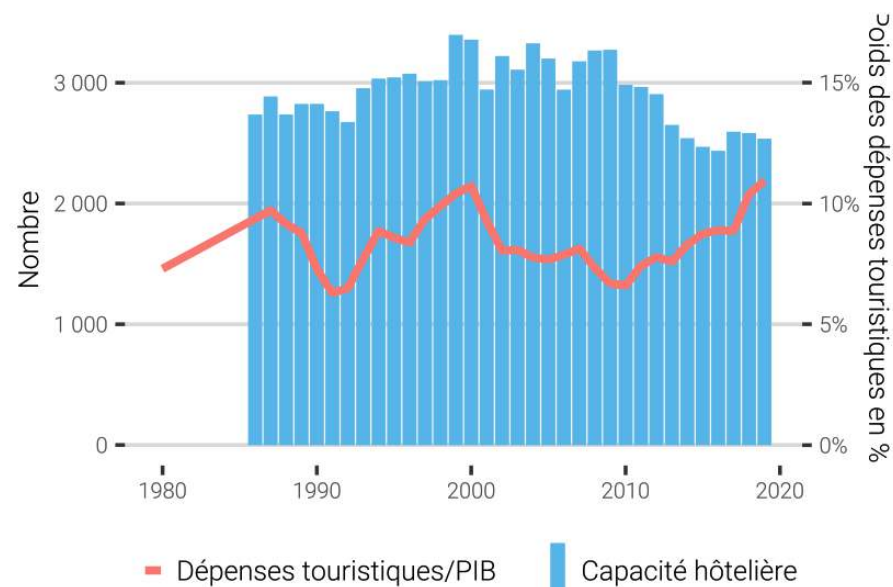
The evolution of tourism in FP

Fig. 14. Nombre de touristes et recette touristique de la Polynésie française



Source : Enquête dépenses touristiques; Service du tourisme; ISPF; Estimations

Fig. 15. Poids des dépenses touristique dans le PIB polynésien et évolution de la capacité hôtelière

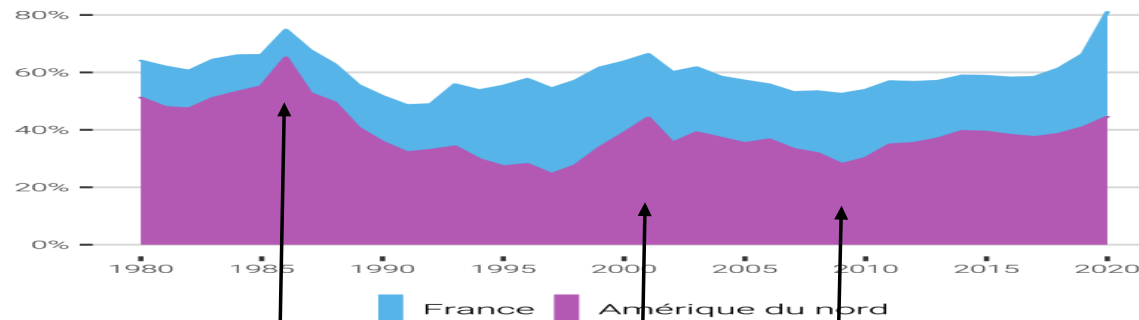


Source : Enquête dépenses touristiques; Service du tourisme; ISPF; Estimations

Tourism in French Polynesia: 1980-2020

The evolution of tourism in FP ... and the impact of the XPF/USD exchange rate

Fig. 16. Évolution des parts de marché Amérique du nord et France dans le tourisme polynésien



Source : Enquête dépenses touristiques ; Service du tourisme ; ISPF ; Estimations

Touristic market shares in FP (1980-2020)
for North America (red) and France (blue)

USD/EUR
•Scale: 1:20.2



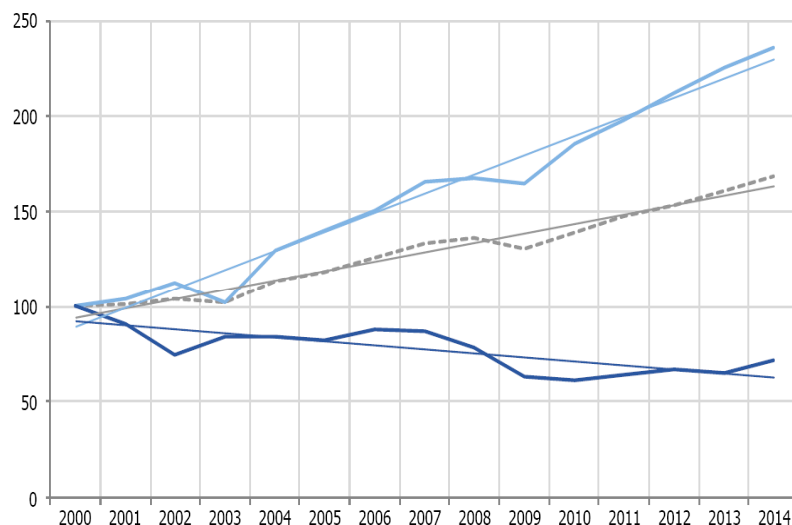
EUR/USD historical data (1980-2020)

Tourism in French Polynesia: 1980-2020

The evolution of tourism in FP ... relative to other destinations after a crisis

Indice de la fréquentation touristique et tendances de moyen-terme

(Base 100 = année 2000)

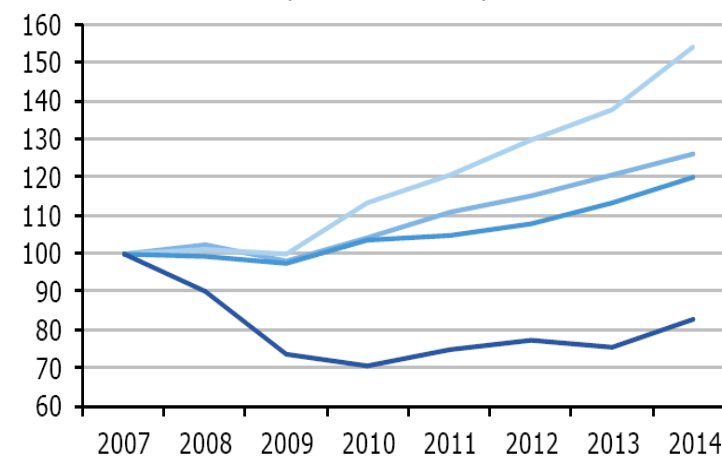


----- Indice des arrivées touristiques dans le monde
 ———— Indice des arrivées touristiques dans la région Asie-Pacifique
 ———— Indice des arrivées touristiques en Polynésie française

Sources : IEOM, ISPF, Douanes

Le boom du tourisme ne profite pas à la Polynésie

Évolution comparée du nombre de touristes
(base 100 en 2007)

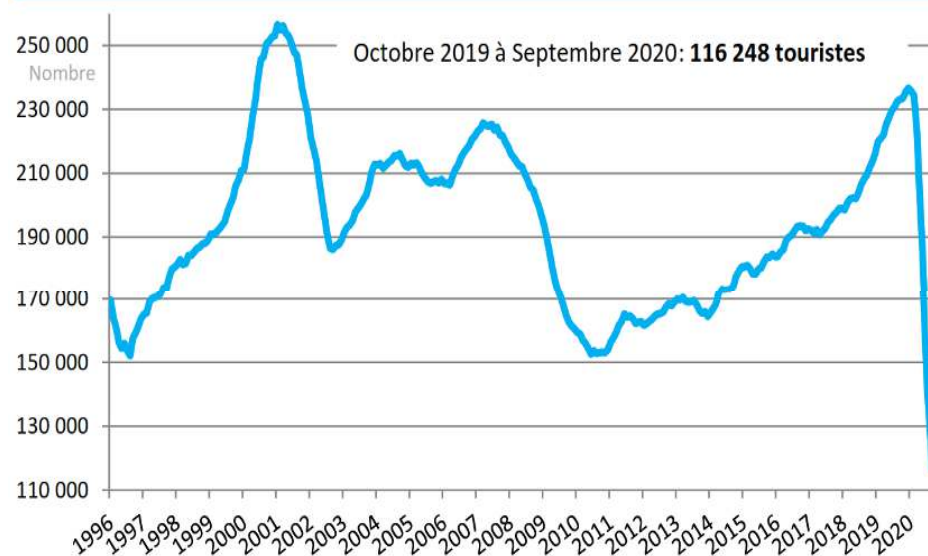


Sources : Service du tourisme, ISPF, OMT

Tourism in French Polynesia: 1996-2022f

The evolution of tourism in FP ... following the crises of 2020-2021 and 2022

ÉVOLUTION DU NOMBRE DE TOURISTES EN CUMUL ANNUEL

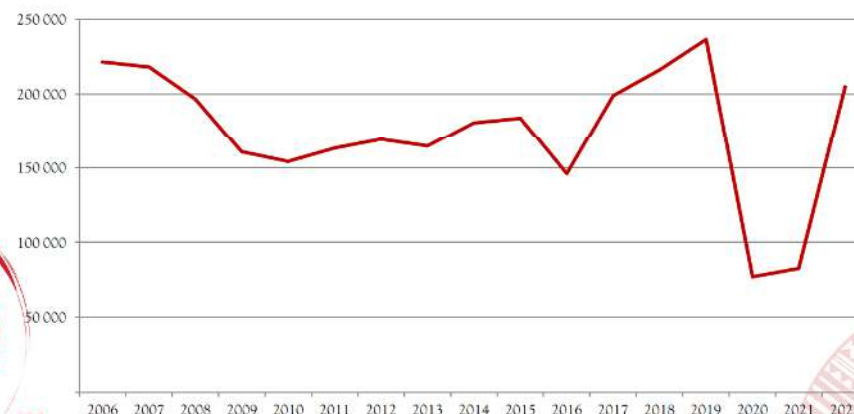


Note de lecture: entre octobre 2019 et septembre 2020, on dénombre **116 248** touristes soit **50,1 % de moins** qu'entre octobre 2018 et septembre 2019

PRÉVISIONNEL 2022

Plus de **200 000** touristes sur l'ensemble de l'année

Nombre de touristes



Tourism in French Polynesia: 2019-2021

The evolution of tourism in FP ... following the crisis of 2020-2021: a mutation?

TABLE 1. Évolution de la fréquentation touristique

	2019	2020	2021
Nombre de touristes	236 642	77 017	82 546
<i>Type d'hébergement</i>			
Croisière	45 225	11 965	12 329
Terrestre	191 417	65 052	70 217
<i>Mode d'hébergement</i>			
Marchand	209 383	66 385	70 373
Non marchand	27 259	10 632	12 173
<i>Pays d'origine</i>			
États-Unis	85 246	31 556	40 086
France métropolitaine	60 382	28 112	34 202
Autres	91 014	17 349	8 258
Durée moyenne de séjour (jours)	14,9	18,2	20,9
Hébergement marchand	12,8	13,0	15,5
Hébergement non marchand	30,0	29,6	34,6

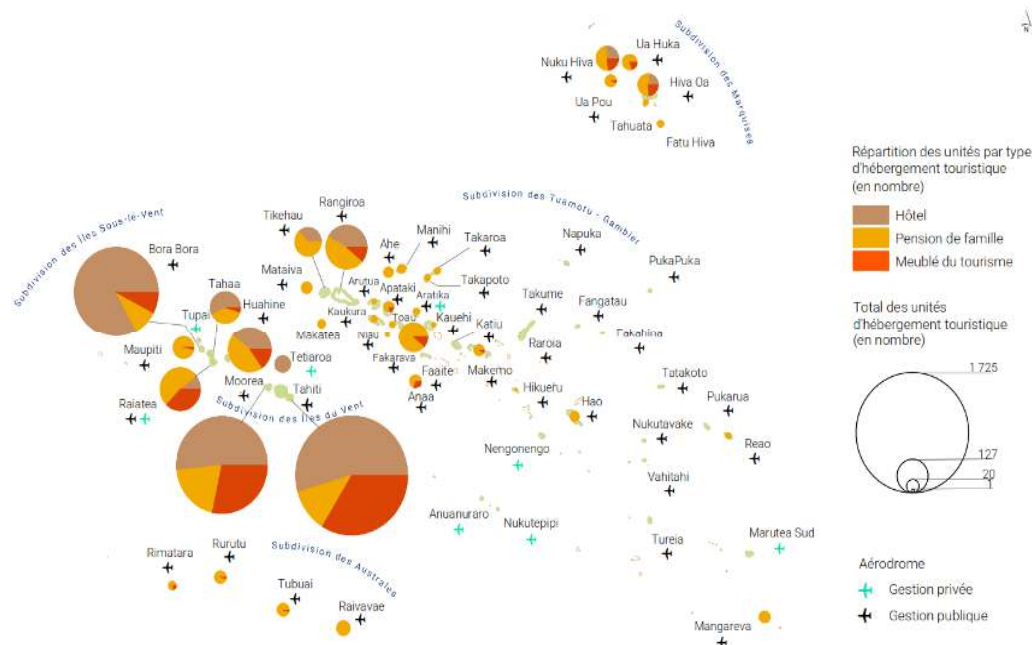
TABLE 2. Indicateurs de fréquentation des structures terrestres marchandes

	2019	2020	2021	2021/2019
Nombre de touristes selon le type d'hébergement marchand				
Hôtels	160 106	50 291	55 507	35%
<i>dont nord-américains</i>	46%	55%	65%	49%
Pensions de famille	35 406	13 613	15 642	44%
<i>dont français</i>	55%	66%	72%	58%
Locations saisonnières	19 512	8 355	9 289	48%
<i>dont français</i>	36%	47%	53%	70%
Nombre de chambres vendues selon la taille				
< à 30 chambres	17 452	8 955	16 321	94%
Entre 30 et 70 chambres	125 614	55 941	60 184	48%
> à 70 chambres	497 969	185 459	238 382	48%
Total	641 035	250 355	314 887	49%

Tourism in French Polynesia: challenges

The supply of accommodations and the touristic density in FP are concentrated on a few islands.

Fig. 2. Offre d'hébergements touristiques terrestres payants en 2019 en Polynésie française



Source : ISPF - SDT - SEAC

	Population RP 2017	NB de touristes accueillis en 2019	Densité touristique
Tahiti	189 517	174 298	1
Moorea	17 463	122 414	7
Bora Bora	10 549	119 143	11
Raiatea	12 249	43 191	4
Huahine	6 075	33 314	6
Marquises	9 346	8 033	1
Australes	6 965	2 168	0,3
Rangiroa	2 709	25 795	9,5
Fakarava	830	12 680	15,3
Total	275 918	236 642	0,9

Source : ISPF - Fréquentation touristique 2019

Sources : « Poids du tourisme dans l'économie locale », ISPF (2020)

FM27 in a few words ...

Issues

1. Diversify and develop various tourism services;
2. Commit to sustainable tourism;
3. Create permanent jobs in all archipelagos of FP;
4. Diversify the source markets.

Vulnerabilities

1. Predominance of 2 source markets (North America, France);
2. Complexity of the destination;
3. Rudimentary tourism structure;
4. Valuation of historical sites;
5. Lack of dedicated infrastructure.



FM27 in a few words ...

Objectives and trajectory towards an inclusive and sustainable tourism

- Put the population at the center of tourism;
- Bringing together, federating, generating collective dynamics;
- Sustainable, eco-responsible tourism;
- Increase interaction with other industries and economic sectors.

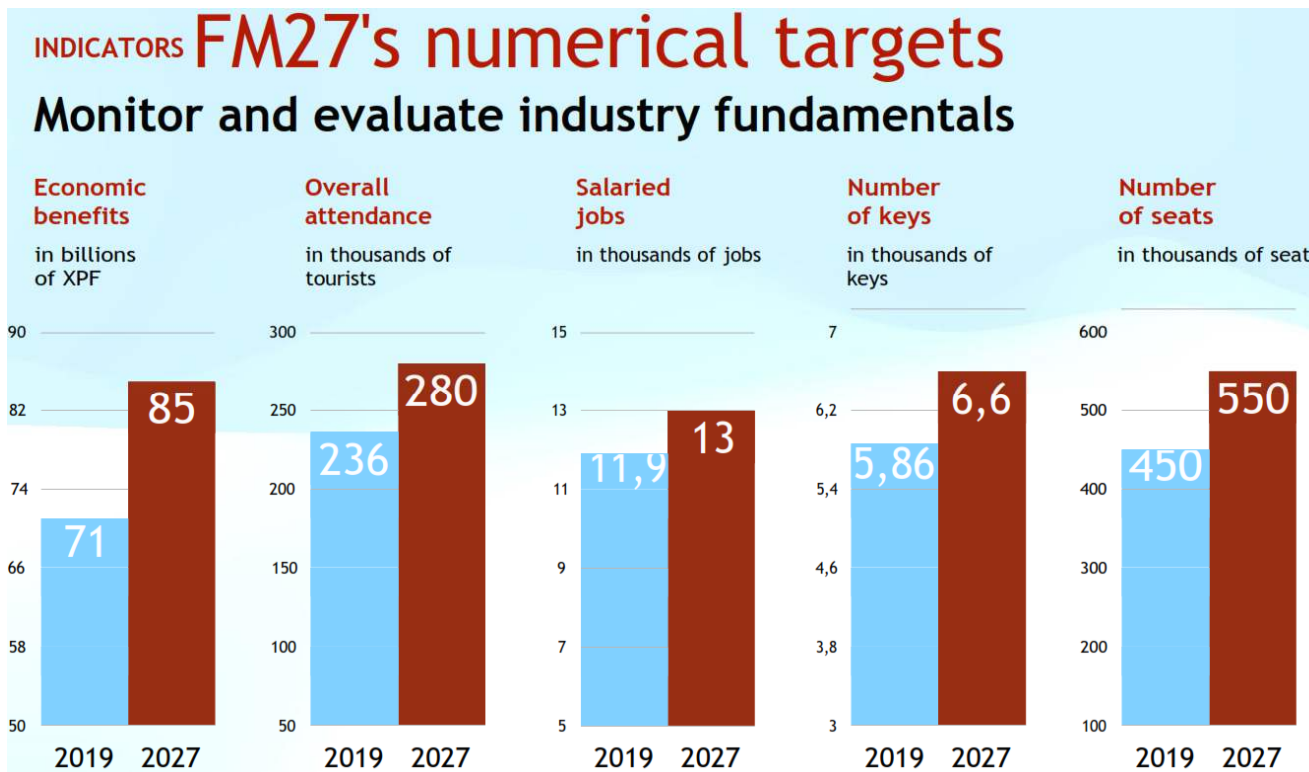
Destination (goals)

- An authentic tourism that favours the experience;
- The excellence of the reception and the services to tourists;
- Leadership for eco-tourism in the South Pacific;
- A variety of experiences and archipelagos.



FM27 in a few words ...

Objectives and indicators



5 axes

1. Enhance and promote the destination
2. Strengthen the diversity of experiences and tourism services
3. Sustainable tourism and eco-tourism
4. Structure and professionalize the sectors
5. Developing the infrastructure

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Understanding the purpose of this workshop

- Our workshop seeks to provide a forum for dialogue between international tourism scholars and professionals from the tourism industry on issues around tourism development in French Polynesia.
- The main focus of this event is on issues related to the implementation of the new tourism strategy "Fāri'ira'a Manihini 2022-2027" (FM27).
- It provides a scientific insight into the implementation of FM27.

"If you want to go fast, go alone, if you want to go far, go together".
African Proverb





Présidence de la Polynésie française,
en charge du Tourisme,
de l'Égalité des territoires et des Relations internationales



L'accueil qui nous ressemble et nous rassemble

STRATÉGIE DE DÉVELOPPEMENT TOURISTIQUE DE LA POLYNÉSIE FRANÇAISE 2022-2027

Présentation synthétique
Août 2022

Our international experts

Australia (& Great Britain):

- Prof. Margaret Deery (expert on social impacts of tourism and events on communities and the role of volunteers in tourism)
- Prof. Larry Dwyer (expert in areas of tourism economics, management, policy and planning)
- Prof. Leo Jago (expert in the economic, social and legacy dimensions of tourism)
- Prof. Gui Lohmann (expert on air transport management, tourism development, travel behaviour, and airline business models)

Hawai'i:

- Prof. Pauline J. Sheldon (expert in tourism demand modelling, tourism education, IT and tourism, regenerative tourism and the design of transformative tourism experiences)

New Zealand:

- Prof. Simon Milne (expert in tourism development in SIDS & implementation of the Pacific Tourism Data Initiative (PTDI) in 10 South Pacific Island nations.
- Prof. Christian Schott (expert in sustainable tourism and education, leader of research-driven VR-for-sustainability project)
- Prof. Ian Yeoman* (online) (expert in the future of tourism)

Scientific insight into the implementation of FM27

- Excellent knowledge of island tourism in Asia-Pacific region
- Complementary expertise to tourism development:
 - Future of tourism
 - sustainable tourism
 - assessment of the economic impacts of tourism
 - assessment of the social, cultural and environmental impacts of tourism
 - Socio-economic assessments of events
 - Role of education in tourism
 - climate change and tourism
 - Air connectivity issues in remote islands
 - tourist experience and satisfaction
 - Perceptions of a local community on tourism development

New Zealand



New Zealand-Aotearoa Government Tourism Strategy



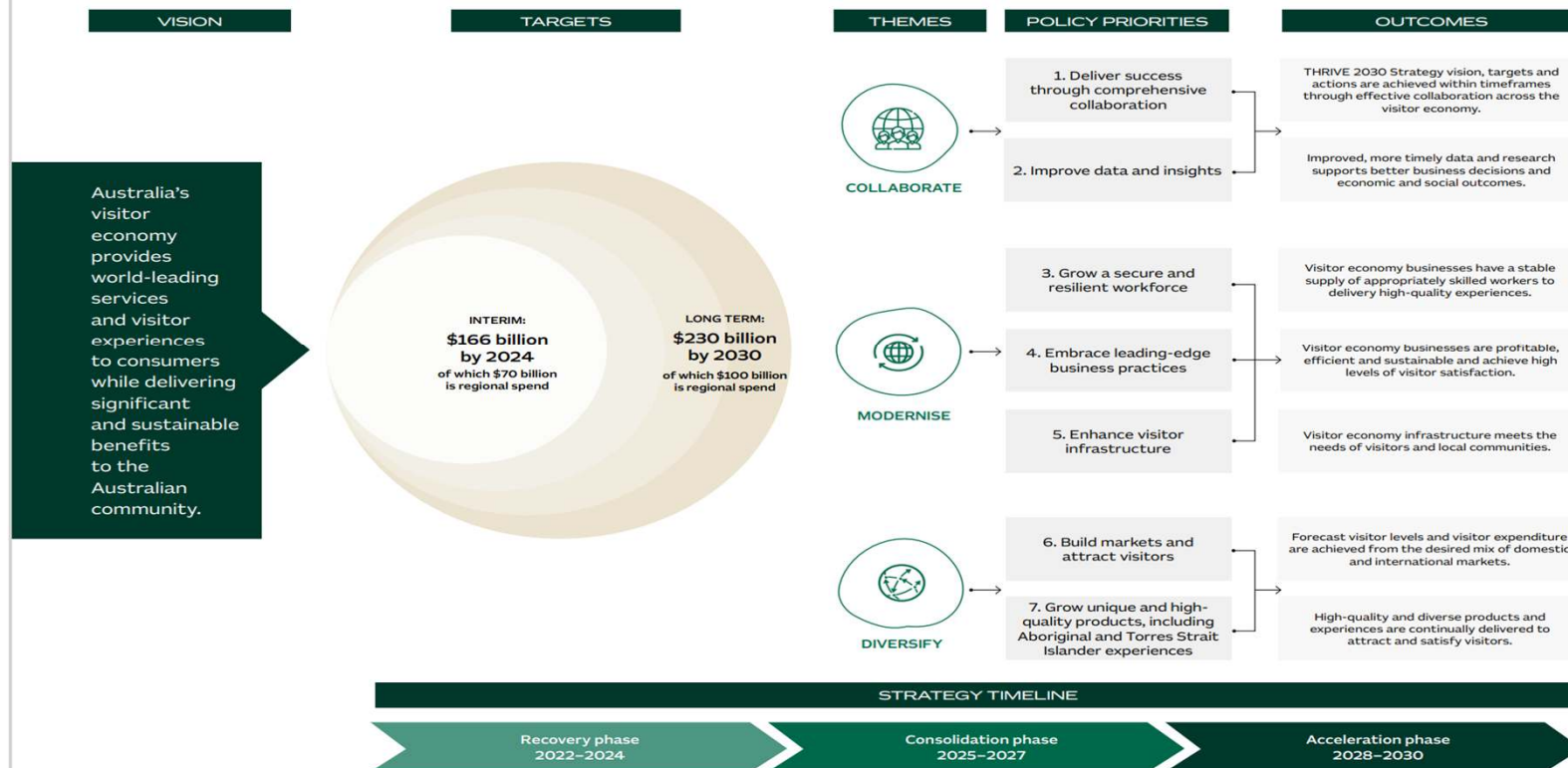
MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI



Department of Conservation
Te Papa Atawhai

Australia

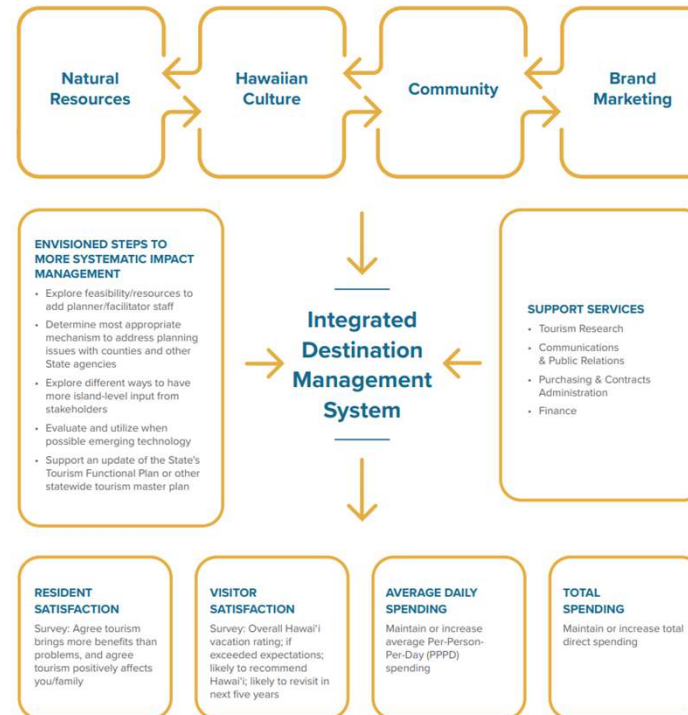
THRIVE 2030 Strategy at a glance



Hawai'i



The Four Pillars of HTA's Investments in Assets
Benefiting Both Residents & Visitors



Context of FM27

- The COVID-19 pandemic has been an opportunity to rethink tourism for the future.
- In French Polynesia, the Covid-19 period coincided with the elaboration of FM27 (**sustainable and inclusive tourism**).
- In order to put in place a sustainable and inclusive tourism policy, it is important to change the way we look at things and implement new tools for measuring tourism performance under the new four pillars of FM27.

A four pillar approach of FM27



Suggested questions

1. What will tomorrow's tourism look like in Pacific Islands and more particularly in French Polynesia?
2. Should we move from "business as usual" model to "sustainable or regenerative tourism"? If so, how ?
3. What new tourism performance indicators are needed to assess the main pillars of FM 27 strategy?

Suggested questions

4. How to diversify tourism products and source markets?
5. How to diversify international routes to facilitate the development of tourism in French Polynesia?
6. How to improve air, land and sea connectivity and facilitate inter- and intra-island travel?

Suggested questions

7. What are the challenges and opportunities of the spread of tourism to outer islands?
8. How to leverage events for maximum local benefit?
9. What is domestic tourism and why is it important?

Workshop Programme

Monday, October 24, 8:30 a.m.-5 p.m.

- Scientific perspectives from international experts on specific FM27 issues
- Discussions

Tuesday, October 25, 8:30 a.m.-12 p.m

- Scientific perspectives from international experts on specific FM27 issues (cont.)
- Roundtable discussions regarding the suggested questions in the programme



Sir Winston Churchill
(November 10, 1942)

“Now this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.”

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Mauruuru !

The organizers

Mondher SAHLI, Vincent DROPSY, Sylvain PETIT