Nature-based Marine Tourism in the Coral Triangle

Exploring the potential for low-impact, high-value Nature-based Marine and Coastal Tourism

Baseline Analysis Summary
Sydney Workshop, 14–15 January 2016

Produced by 2iis Consulting in collaboration with

BASELINE ANALYSIS SUMMARY: CONTENTS

FOREWORD

+ The **Nature-based Marine Tourism in the Coral Triangle** report is part of the broader **Developing and Promoting Sustainable Nature-based Tourism in the Coral Triangle** project. An initiative, supported by funding from the Australian Government, that looks to assist the 6 countries of the Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security (CTI-CFF) **to develop and/or accelerate a long-term approach to more sustainable Nature-based Tourism in the Coral Triangle.**

+ The long-term vision that the broader initiative is designed to support is that:

  'The Coral Triangle region is a renowned sustainable tourism destination with economic benefits flowing to communities, governments and private enterprise, providing a strong incentive to protect and sustain the region's natural environment.'

+ The initiative focuses on **the long-term business opportunity** a Coral Triangle Nature-based Tourism Brand could present for the whole region and what would be necessary to support and promote it.

+ It is also intended to encourage and assist the Tourism Industry **to accelerate its investment in Nature-based Tourism** within the Coral Triangle.

+ The **NBMT in the Coral Triangle** report provides baseline data and analysis to help highlight **the most effective ways to lay some initial foundations** to support the above long-term vision.

+ **It also outlines some of the challenges** likely to be faced and identifies some models from around the world that can help accelerate the Coral Triangle's Nature-based Tourism development.

DEFINING SUSTAINABLE NATURE-BASED MARINE TOURISM

For the purposes of the report, the following definition of Nature-based Tourism was used:

‘Nature-based Tourism is any type of tourism that relies on experiences directly related to natural attractions and includes Ecotourism, adventure tourism, extractive tourism, wildlife tourism and nature retreats’.

To clearly define Sustainable Tourism, we have relied upon the UN World Tourism Organisation (UNWTO), which defines it as:

‘Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’.

And finally, we are further focused on tourism in Marine and Coastal areas, defined by the International Coastal and Marine Tourism Society (ICMTS) as follows:

‘Coastal and marine tourism includes those recreational activities which involve travel away from one's place of residence which have as their host or focus the marine environment and/or the coastal zone.

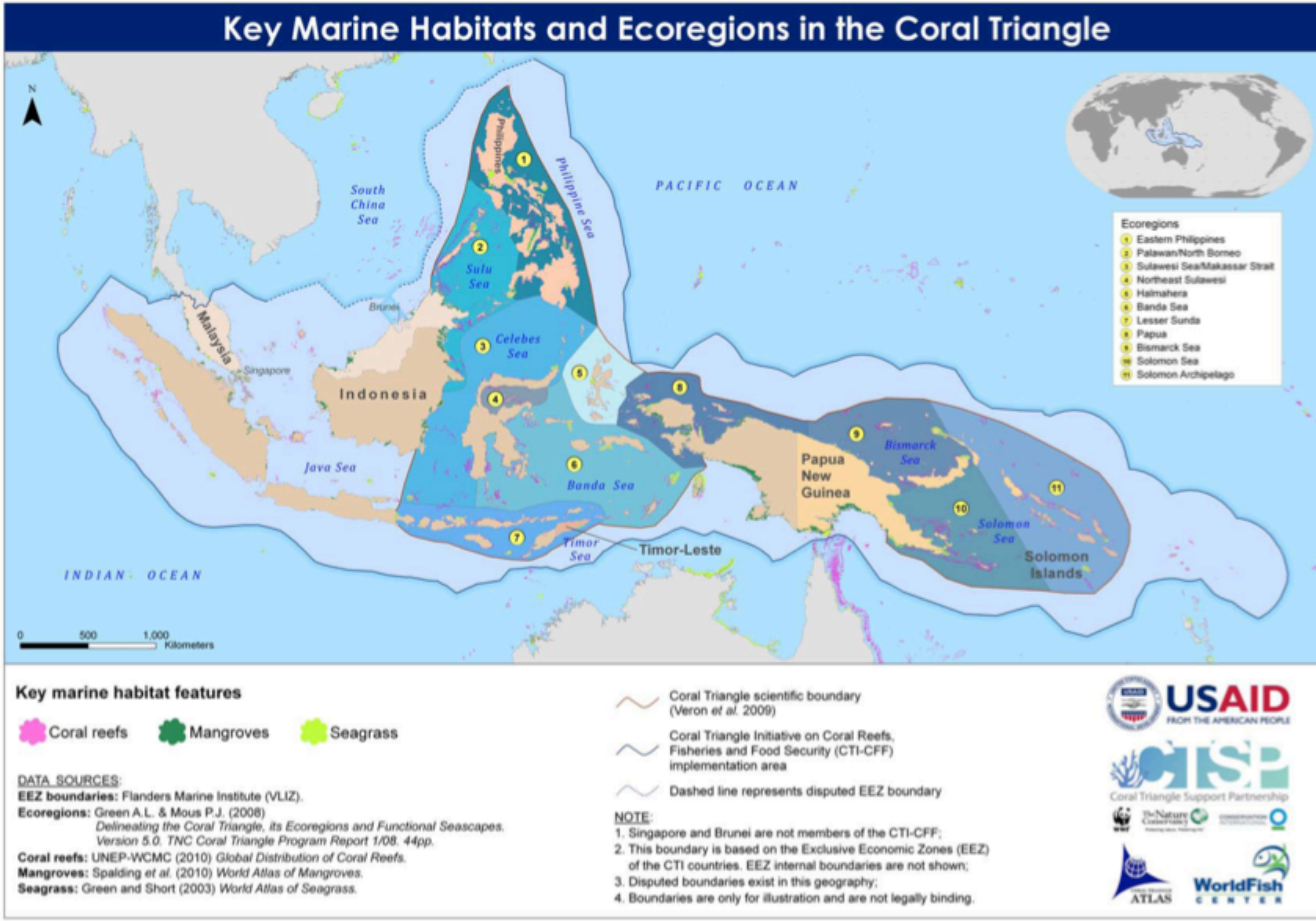
The marine environment is defined as those waters that are saline and tide-affected. The coastal zone is defined as those areas of land which border the marine environment. The coastal zone extends inland to the first major change in topography beyond which coastal processes have little influence.’

BACKGROUND

‘Around the world today, marine tourism is facing a period of unprecedented growth, opportunities and challenges. The fast paced expansion of coastal and marine tourism has led to a range of serious environmental threats, while on the other hand there are consistent and pressing appeals for the industry to ensure sustainable economic gains for local communities.’

‘While the fisheries benefits were significant from Marine Protected Areas, the greatest boost to household incomes came from new livelihoods, especially in tourism. The protected ecosystem, preserved coral reefs and clean and healthy oceans will attract more tourists to come and enjoy the underwater experience. Therefore preserving nature will eventually bring significant economic benefit for coastal communities, giving them hope for a better life.’

Widi A. Pratikto, Ph.D., Executive Director of Regional Secretariat CTI-CFF
4th CTI-CFF Regional Business Forum, 27 August 2015


Key Marine Habitats and Ecoregions in the Coral Triangle
South China Sea
PACIFIC OCEAN
Philippine Sea
Sulu Sea
Celebes Sea
Malaysia
Singapore
Brunei
Indonesia
Java Sea
Banda Sea
Timor Sea
Timor-Leste
Bismarck Sea
Papua New Guinea
Solomon Sea
Solomon Islands
INDIAN OCEAN
Ecoregions
1 Eastern Philippines
2 Palawan/North Borneo
3 Sulawesi Sea/Makassar Strait
4 Northeast Sulawesi
5 Halmahera
6 Banda Sea
7 Lesser Sunda
8 Papua
9 Bismarck Sea
10 Solomon Sea
11 Solomon Archipelago
0 500 1,000 Kilometers
Key marine habitat features
Coral reefs
Mangroves
Seagrass
DATA SOURCES:
EEZ boundaries: Flanders Marine Institute (VLIZ).
Ecoregions: Green A.L. & Mous P.J. (2008) Delineating the Coral Triangle, its Ecoregions and Functional Seascapes. Version 5.0. TNC Coral Triangle Program Report 1/08. 44pp.
Coral reefs: UNEP-WCMC (2010) Global Distribution of Coral Reefs.
Mangroves: Spalding et al. (2010) World Atlas of Mangroves.
Seagrass: Green and Short (2003) World Atlas of Seagrass.
Coral Triangle scientific boundary (Veron et al. 2009)
Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security (CTI-CFF) implementation area
Dashed line represents disputed EEZ boundary
NOTE:
1. Singapore and Brunei are not members of the CTI-CFF;
2. This boundary is based on the Exclusive Economic Zones (EEZ) of the CTI countries. EEZ internal boundaries are not shown;
3. Disputed boundaries exist in this geography;
4. Boundaries are only for illustration and are not legally binding.
USAID FROM THE AMERICAN PEOPLE
Coral Triangle Support Partnership
ATLAS
WorldFish CENTER

A NOTE ON THE DATA

Where possible, every attempt has been made to verify the data included in the report and, in the country sections, to look to provide a consistent view across the 6 countries.

However, given the disparate nature of tourism in the region and the lack of fully consistent tourism measurement across the different geographies, there are a number of areas that are not fully comparable. In a limited number of cases, this has meant refraining from using the most-up-to-date data for some countries to enable as much consistency as possible.

There are certainly gaps in the data throughout the report, and some of it is not fully statistically verifiable given the disparate sources it has come from. However, it does provide an overview if the current baseline for tourism in the region, as well as starting to point some potential ways forward for Nature-based Tourism.

It should not be taken as fully accurate however, and errors should be assumed to exist.

A NOTE ON THIS SUMMARY

This summary is very much an abridged version of the full report.

Large sections of the report are not included or referred to only briefly. The full report is available to download in the Clients + Projects section of www.2iis.com.au.

IN SUMMARY

+ The **Nature-based Marine Tourism in the Coral Triangle** report summarises the current state of Tourism and Nature-based Tourism in the 6 countries that make up the CTI-CFF and explores some of the opportunities for growing low-impact, high-value nature-based marine and coastal tourism in the Coral Triangle region.
+ It identifies a **very significant and growing opportunity for investment** in this rapidly emerging tourism segment that has the potential to both provide socio-economic growth in all of the countries, whilst helping address some of the growing negative economic, social, environmental and cultural impacts that mass tourism currently has on the region.
+ It also provides the **framework for the future development of a full business case** for this investment, once further analysis and some initial Nature-based Tourism site identification work has been undertaken.
+ The Coral Triangle is a unique region environmentally, culturally, socially and economically. **It is well placed to benefit from the forecast strong growth in global tourism**, particularly Nature-based Tourism, given its exceptional natural resource base.

IN SUMMARY (continued)

- **But grasping this opportunity requires careful management.** There is a significant risk that the over-development and environmental degradation that the CTI-CFF was created to help address could actually be accelerated by uncontrolled expansion of mass tourism and/or poorly managed Nature-based Tourism.

- Conversely, carefully planned targeting of the rapidly expanding Nature-based Tourism segment will have **multiple benefits for all 6 countries in the Coral Triangle Region** – particularly for Papua New Guinea (PNG), the Solomon Islands and Timor–Leste (and potentially Brunei-Darussalam).

- One other significant area of potential opportunity rests in the project being able to provide the CTI-CFF countries with the chance to **work together on a pro-active, economic growth-based initiative** that could help improve the value of their respective tourist industries whilst also improving social & environmental outcomes. This could have the benefit of **generating considerable additional momentum to some of the other initiatives already underway** within the CTI-CFF.

A I TOURISM IS FORECAST TO GROW, BUT SO ARE ITS IMPACTS

+ **The Global Tourism Industry is growing rapidly**, and is forecast by the UN World Tourism Organisation (UNWTO) to continue doing so well into mid-century.

+ While this growth provides clear positive socio-economic opportunities for emerging countries around the world – including, to varying degrees, all of the CTI-CFF countries, **it also brings with it significant, and increasingly prevalent, negative impacts**. Particularly for those countries experiencing the bulk of their growth via mass, mainstream tourism.

+ These impacts are not just environmental; they also **directly affect the social and cultural fabric, and economic performance of countries**; often exacerbating the very problems that tourism development is intended to help solve.

+ As outlined in the country overviews, **these negative impacts are clearly seen throughout the 6 CTI-CFF countries**, and with the rate of tourism growth forecast to be stronger in the Asia Pacific region than anywhere else in the world, this indicates the negative impacts are likely to grow faster in this region as well.

+ However, the CTI-CFF countries have, in the main, recognised this fact and all include some reference in their tourism strategies to the need to **move away from, or avoid altogether, an over-reliance on mass tourism in the future.**

B | THE NICHE-TOURISM OPPORTUNITY IS GROWING RAPIDLY AROUND THE WORLD

+ Set against this growing realisation that the forecast growth in mass tourism comes with increasing negative impacts and diminishing socio-economic benefits, is the global niche tourism opportunity that has been **building steadily over the last 2 decades and now seems to be in a period of rapid expansion.**

+ Within this growth in niche tourism sit two segments that are of particular relevance to the Coral Triangle: **Nature-based and Adventure-based Tourism**. Both of these are already well established globally, and forecast by the World Travel and Tourism Council to be among **the fastest growing tourism sectors out to 2035**.

+ There is also a growing body of evidence that **the overall return on investment (ROI) for these types of niche tourism far exceeds those of mass and/ or mainstream tourism**; providing economic, social, environmental and cultural benefits to the people on the ground who often need those benefits most.

+ These benefits would be enough on their own to warrant close investigation of the opportunity, but when you also factor in the ever-increasing risks of climate change to the Coral Triangle region, the need to also look at them as **pathways to community climate resilience** also becomes apparent.

C I THE CORAL TRIANGLE IS UNIQUELY WELL POSITIONED TO LEVERAGE THIS NICHE-TOURISM TREND

+ Given the Coral Triangle's natural resource base, **the region is particularly well suited to take advantage of the forecast growth in the Nature and Activity-based tourism segments**, and also has the opportunity to build a strong and differentiated competitive advantage in the global tourism market through them.

+ The accelerating growth of these sectors presents the Coral Triangle with an opportunity to develop a Nature and Adventure-based Tourism segment that has **a forecast value somewhere in the region of US $120–US $150 billion per annum by 2035.**

+ Even though the lack of overall Nature-based Tourism data currently means these forecast figures should be viewed with caution, they still identify **a significant economic opportunity that provides a very strong base from which a full business case can be developed.**

+ In exploring each country's capacity to unlock the Nature/ Adventure-based Tourism opportunity, it was clear that **each of them have identified the opportunity as existing in some shape or form.**

+ This opportunity identification ranged from some highly detailed Ecotourism forecasts undertaken by the Philippines, to a more general commitment to focusing on Nature-based Tourism as opposed to mass tourism by Timor-Leste, but **all included it in their future tourism growth strategies** at some level.

+ The discrepancy in emphasis on Nature/ Adventure-based Tourism highlights the overall discrepancies that exist between the countries – although there were **more similarities from a Tourism (particularly Nature-based Tourism) perspective than was originally anticipated.**

D I WHILST THERE ARE DIFFERENCES, THE 6 CTI-CFF COUNTRIES ALSO HAVE SIGNIFICANT COMMON INTERESTS

+ Ranging in size from just over ½ million people in the Solomon Islands, to over ¼ billion people in Indonesia, **there is clearly a huge variance within the 6 countries that currently make up the CTI-CFF.** In touching briefly on Brunei Darussalam and Singapore in the report, this variance was even more pronounced.

+ There are a number of ways this variance could be categorised. For the purposes of this report, the **6 CTI-CFF countries were placed in 4 categories**, loosely based on a number of the tourism metrics used to undertake the analysis. This categorisation is by its very nature subjective, and is only really useful in illustrating, in as simple a way as possible, the various stages each country's tourism industry is at.

D I WHILST THERE ARE DIFFERENCES, THE 6 CTI-CFF COUNTRIES ALSO HAVE SIGNIFICANT COMMON INTERESTS (continued)

The 4 Approximate Categories for the 6 current CTI-CFF Countries

1) The Solomon Islands and Timor-Leste

   a) Both of a **similar size and at an early stage of tourism development** with significant structural/ infrastructure challenges;

   b) Identified Nature-based Tourism as **a major (if not the major) focus for tourism growth**;

   c) Significant opportunity for tourism to benefit **the entire country's economy, culture and society** if sustainable growth of suitable tourism sectors can be achieved;

   d) **Exceptional natural resource base** for Nature and Adventure-based Tourism.

D I WHILST THERE ARE DIFFERENCES, THE 6 CTI-CFF COUNTRIES ALSO HAVE SIGNIFICANT COMMON INTERESTS (continued)

The 4 Approximate Categories for the 6 current CTI-CFF Countries

2) Papua New Guinea

a) With a population of 7.5 million, **a step up in overall size** (Solomons 575K; Timor-Leste 1.1M), and **the tourism industry is also comparatively further developed** – although PNG still faces a large range of infrastructure challenges. It also faces increasing pressure from resource exploitation;

b) Nature-based Tourism is **a clear focus in their plans alongside cultural tourism development**;

c) Clear opportunity for tourism to **significantly benefit broad segments of the population** – if a path through PNG's development challenges can be found;

d) Also at a stage where they **need to start developing the overall industry** to become more sophisticated, with destination development, increased promotion and capacity building just beginning to be explored.

e) **Arguably the strongest natural resource base** for Nature-based Tourism given high overall biodiversity.

D I WHILST THERE ARE DIFFERENCES, THE 6 CTI-CFF COUNTRIES ALSO HAVE SIGNIFICANT COMMON INTERESTS (continued)

The 4 Approximate Categories for the 6 current CTI-CFF Countries

3) Philippines

a) A significant step up to the Philippines (100M population) and there is **clear separation between it and the 3 'emerging' tourism markets** of the Solomon Islands, Timor-Leste and Papua New Guinea;

b) **Another step-up in terms of tourism development** – although infrastructure development remains a challenge and the **tourism 'product' delivered can be inconsistent** and fail to live up to the considerable promise set-up by the ongoing 'It's More Fun in the Philippines' tourism campaign;

c) Has identified the Nature-based Tourism opportunity – although has categorised it as 'Ecotourism' – and **appears to have undertaken the most detailed forecasting and modelling of the opportunity** it presents;

d) **Strong natural resource base that has already seen some development** for Nature and Adventure-based Tourism in certain parts of the country;

e) Potential **domestic tourism opportunity for NBT** that does not currently exist to the same degree in the emerging countries;

f) Already showing **evidence of some significant negative impacts** from mass/ mainstream tourism.

D I WHILST THERE ARE DIFFERENCES, THE 6 CTI-CFF COUNTRIES ALSO HAVE SIGNIFICANT COMMON INTERESTS (continued)

The 4 Approximate Categories for the 6 current CTI-CFF Countries

4) Indonesia and Malaysia

a) Both **more 'developed' tourism markets in comparison** with the other 4 countries (although both view themselves as below Singapore), with Malaysia the most sophisticated in terms of segmentation;

b) Although tourism markets are further developed, **still face infrastructure challenges** – in particular through impacts from the ever-growing burden of increasing tourist volume. **Both have identified the need to move away from relying on volume growt**h in the future (Malaysia is particularly clear on this);

c) Strong and diverse natural resource base in both countries, which are partially developed for Nature-based activities in certain regions. Both have outlined a desire to develop the segment/ niche in their various Tourism Strategic Plans, with the **domestic opportunity potentially greater than the international one**;

d) Probably have the **opportunity to move the most rapidly** of the CTI-CFF Countries in developing the Nature-based Tourism segment – and potentially the **strongest motivation to do so given the level of negative impacts** currently being felt. Focusing on Nature and Adventure-based Tourism could help accelerate their need to develop higher-yielding, lower impact tourism segments;

e) Both have the **resource capacity to provide tourism 'technical assistance'** to the 3 emerging countries.

E I A CLEAR OPPORTUNITY FOR NATURE/ ADVENTURE-BASED TOURISM IN THE CORAL TRIANGLE REGION

+ Having emphasised some of the differences, it is striking that **each of the 6 countries have independently identified the Nature & Adventure-based Tourism segment as an opportunity**; an opportunity supported by the forecast value for the segment, which ranges **from US $210 million per year in Timor-Leste to over US $50 billion in Indonesia** in terms of its potential value to the economy of each country by 2035. A summary of country forecasts is included later in this document.

+ This overall potential value is just one part of the equation however. Nature-based Tourism also provides an opportunity for the emerging countries to build their tourism industries in a way **that both supports their communities and economy, whilst also providing them with a way to avoid some of the negative impacts that mass tourism could bring.**

+ For the more developed countries it provides **a potential path to a more balanced mix of tourism that relies less on mass tourism**, and would also provide significant socio-economic and cultural benefits to their many and varied communities.

+ Having said all that, leveraging the clear economic, social and cultural benefits that could accrue from developing Nature and Adventure-based Tourism in the Coral Triangle is not a straightforward task.

+ The tourism infrastructure challenges in each of the countries are significant, but **so too are the challenges of building a regional approach that harnesses the 6 CTI-Countries' stated intentions to grow the Nature-based tourism segment** and then translates them into sustained and concerted action that successfully opens up the **forecast US $150 billion opportunity** for the benefit of all the countries.

F I EXISTING MODELS CAN PROVIDE SOME GUIDANCE TO INFORM A CTI-CFF NATURE-BASED TOURISM MODEL

Whilst it may be complex, there are some good examples of where similar tourism programs are being successfully implemented in various geographies around the world, in particular:

1) The Australian National Landscapes Program,
2) Destination Europe 2020; and
3) The ASEAN Tourism Marketing Strategy 2012–15.

These provided a number of insights, with the following being of particular significance:

a) **Overall planning:** take time to get the program structure, implementation plan and institutional structure right to give the program the greatest chance of long-term success;

b) **Stakeholder engagement:** don't underestimate the need to ensure all stakeholders are fully engaged and understand the opportunity – and the time this takes. Aim to get it done right, rather than fast;

c) **Governance structure:** ensure this allows for enough autonomy for those running the program;

d) **Site Selection and Destination Management:** this drives the overall program and its success depends on this component being undertaken well. Take time in site selection, criteria setting & process development.

e) **Overall brand architecture and marketing strategy:** this is complex and time-consuming, but critical. Ensure an overall view of the brand architecture is developed early and remember this is about overall brand strategy, not just about creating a new logo;

f) **Capacity development:** there will be gaps in understanding and capability in the CTI-CFF that will need addressing over the mid to long-term. Ensure adequate resources are invested in this area.

G I THERE IS A CLEAR (AND STRONG) ROLE FOR A REGIONAL CORAL TRIANGLE NATURE-BASED TOURISM BRAND

+ What the above leads to is the identification of **a clear role that a Coral Triangle Nature-based Tourism Brand could play**; both in terms of opening up the Nature-based Tourism opportunity for all the CTI-CFF countries, and also acting as something of a catalyst to help each of them overcome some of the specific challenges they face in their tourism development.

+ It could also **help all the countries compete in the increasingly competitive tourism market**, through more efficient use of limited tourism promotion budgets and by building a clear regional competitive advantage in Nature/ Adventure-based Tourism in the Coral Triangle.

+ There is also evidence found throughout the analysis in this report of **an extremely strong market for Coral Triangle Nature-based Tourism, that a Brand is needed to fully capitalise on**. The existence of a clear 'brand vacuum' exists when it comes to tourism in the Coral Triangle.

+ **Filling this brand vacuum would be a relatively easy task**, with the **Coral Triangle, Amazon of the Oceans** platform one of the existing brands that appears most able to evolve to do so. Exploring this as a potential option is worth undertaking as part of the next stage of the project.

+ Focusing on growing the Nature-based Tourism opportunity also has the **potential to provide a unifying focus for all six CTI-CFF countries** (or for all eight of the Coral Triangle countries given similar tourism opportunities exist in Brunei Darussalam and Singapore), and could provide a single development pathway that all can benefit from over a considerable period of time.

H I HOWEVER, THERE ARE ALSO SOME CLEAR WATCH-OUTS IN DEVELOPING SUCH A BRAND

+ **The tendency may be to move too rapidly on this project**, when the reality is the complexity involved demands some **careful planning, full stakeholder engagement and a number of the steps currently planned for later stages of the project to be completed** before progressing too far.

+ **The site selection and destination management steps are particularly important** to explore fully and ensure they can support the aspirational nature of the brand that would need to be created.

+ **The real opportunity for any tourism brand rests in promoting regions not individual sites or resorts,** so the areas selected will also need to be able to support this broader approach over time – and to have the necessary management frameworks either in place or able to be put in place.

+ **It will be important to build an overall brand architecture and also to start developing the necessary resource frameworks** to give the Nature-based Tourism opportunity the greatest chance of success.

+ In terms of Stakeholder engagement an initial list of the broad range of inter-related stakeholders and actors involved in Tourism and Nature-based Tourism in the Coral Triangle is included in the full report – for discussion later today. **It is essential that further work is done in mapping these stakeholders and engaging them effectively.**

I I HOW TO LEVERAGE THE OPPORTUNITY FROM HERE – CONTINUING TO BUILD THE BUSINESS CASE

+ Just based purely on the potential economic value of Nature-based Tourism identified through this report, **there is clearly a strong initial business case that should be explored as fully as possible.**
+ Add in the inter-related social, cultural and environmental benefits, and the potential to reduce some of the future impacts of poorly managed tourism growth and the business case becomes even stronger.
+ And with the final addition of the fact that **Nature and Adventure-based Tourism are all segments that each of the countries is looking to invest in**, then the conditions certainly appear conducive to some significant investment in Nature and Adventure-based Tourism in the Coral Triangle.
+ **This baseline analysis is the first stage in documenting this business case** (and these conclusions form the initial framework for it).
+ The report is also intended to be of immediate use to **inform both communications strategy development for the project and also the ongoing site identification and selection process** that continues through much of 2016.
+ It will also be **an important input to the extensive stakeholder consultations** that will be undertaken from this point forward, and to act as a basis for a broad range of ongoing discussions about the opportunities for Nature-based Tourism in the Coral Triangle.
+ In that respect, **this report is very much a tangible starting point for what could be a project with a significant and far-reaching development impact** both within the Coral Triangle, and also across the wider region.

I I HOW TO LEVERAGE THE OPPORTUNITY FROM HERE – CONTINUING TO BUILD THE BUSINESS CASE (continued)

+ **The Coral Triangle is a unique and inspiring region** – and the countries that make it up are as diverse in their make up as the Coral Triangle is in its biodiversity.
+ Leveraged together through a Coral Triangle Nature-based Tourism brand, the **CTI-CFF has the opportunity to use that uniqueness to deliver tangible long-term benefits** to communities throughout the region that really need them.
+ **To catalyse the slow but vital transition of the regions' tourism industry onto a more sustainable long-term growth path** that can more fully support the socio-economic growth needs of all the Coral Triangle Countries.
+ **To ensure tourism plays a fuller role** in the protection of this unique and life-supporting region.
+ And if even part of that can be achieved, **it will make a strong business case, into a potentially great one.**

3 I A MORE DETAILED LOOK AT KEY AREAS

TOURISM AS A DRIVER OF SOCIO-ECONOMIC PROGRESS

'Tourism, one of the world's top job creators and a lead export sector, especially for developing countries, can play a significant role in the achievement of MDG 1: eradication of poverty, MDG 3: gender equality, MDG 7: environmental sustainability and MDG 8: global partnerships for development.'

UNWTO. Tourism and the Millennium Development Goals. 2010

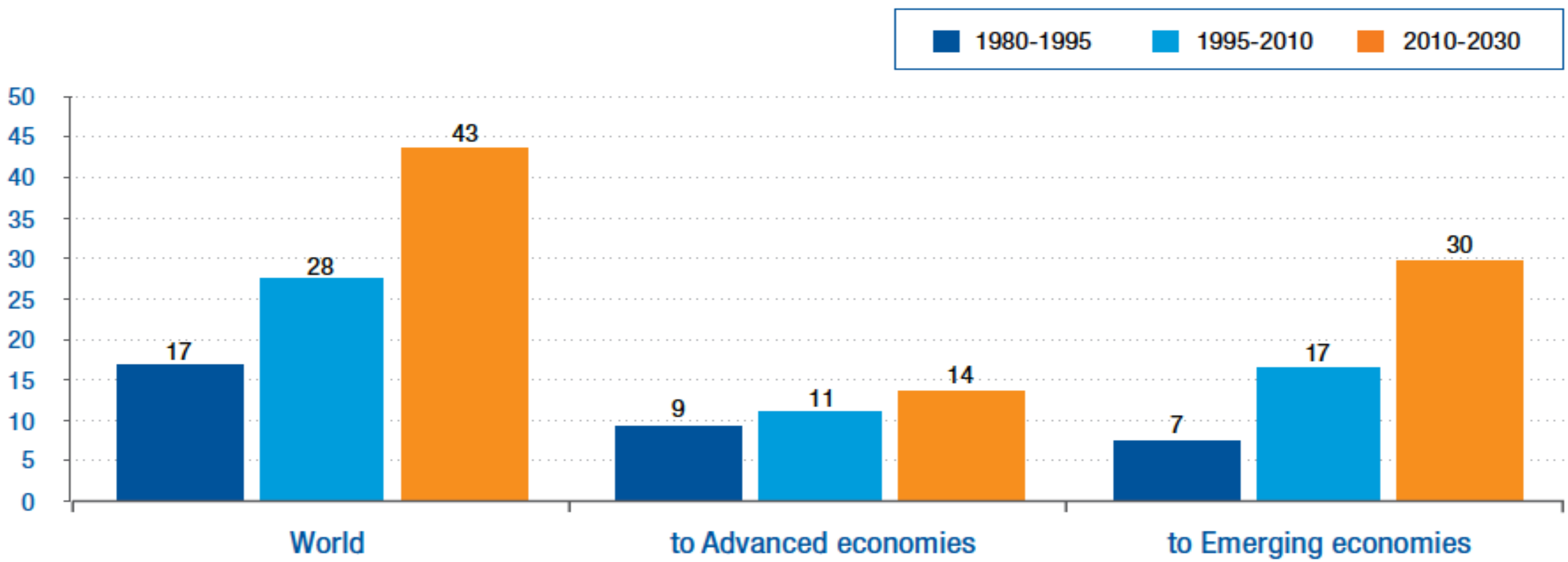
THE GLOBAL TOURISM MARKET: STRONG GROWTH FORECAST TO 2030

Despite occasional downturns, tourism over the last 65 years has seen virtually uninterrupted growth.

Inbound tourism, advanced and emerging economies

International Tourist Arrivals, absolute change over previous year, million

© UNWTO | Tourism Towards 2030: Global Overview. 2011, p. 13

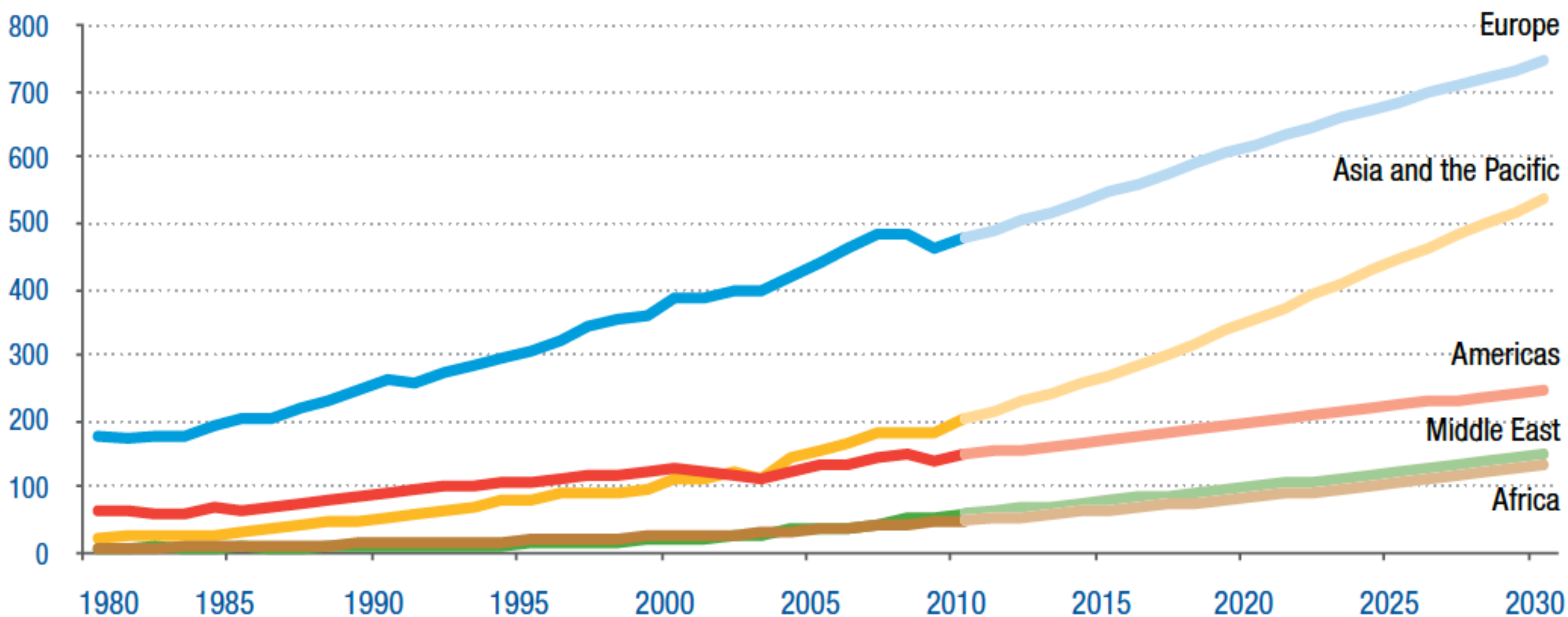


THE GLOBAL TOURISM MARKET: STRONG GROWTH FORECAST TO 2030

Inbound tourism by region of destination

International Tourist Arrivals, million

© UNWTO | Tourism Towards 2030: Global Overview. 2011, p. 15

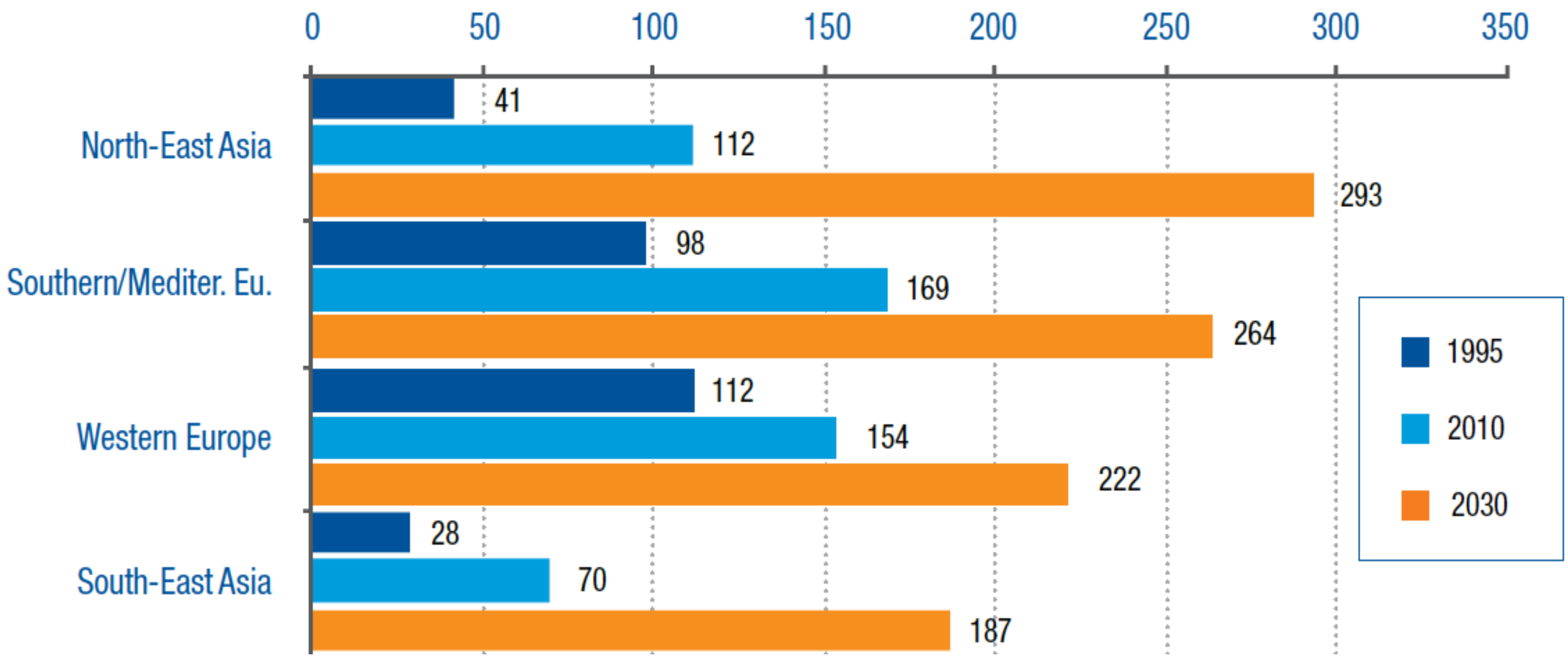


THE GLOBAL TOURISM MARKET: STRONG GROWTH FORECAST TO 2030

International tourism by (sub)region of destination

International tourist arrivals, million

© UNWTO | Tourism Towards 2030: Global Overview. 2011, p. 21



THE GLOBAL TOURISM MARKET: STRONG GROWTH FORECAST TO 2030

Global Socio-Economic Forces Influencing Tourism

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012-2015.

1 CLIMATE CHANGE	UNCERTAINTY & TURBULENCE	COST OF FUEL AND ITS AVAILABILITY	GROWTH OF LOW-COST CARRIERS	2 CONSUMER PREFERENCES & BEHAVIOUR	CHANGING DEMOGRAPHICS
3 INFLUENCE OF THE ASIAN TRAVELLER	TERRORISM AND NATURAL DISASTERS	4 RAPIDLY GROWING VISITOR NUMBERS	RAPID PACE OF URBANISATION	5 NEW METRICS OF SUCCESS	OPEN SKIES

TOURISM IN THE ASIA PACIFIC AND SOUTHEAST ASIA

The Asia Pacific region now accounts for 30% of the US $1,246 billion global tourism market by value, making it the second largest region after Europe (41%).

TOURISM IN THE ASIA PACIFIC AND SOUTHEAST ASIA

Domestic Tourism

Overall the total size of domestic tourism was estimated at over 5.5 billion trips globally in 2014 (against 1.1 billion international trips). This equates to US $3,642 billion in overall value, almost 3 times larger than the US $1,245 billion in value of the International market as noted at the start of this section.

Domestic Tourism: Size and Growth (2014–2025)

Source: World Travel and Tourism Council (WTTC). Travel and Tourism Economic Impact 2015, Southeast Asia.

REGION/ SCALE	Current Domestic Tourism			Forecast Domestic Tourism		
	2014		2015	2025		
	US $ Billion (Value)	% of Total GDP	Forecast Growth (%)	US $ Billion (Value)	% of Total GDP	Growth * (%)
Worldwide	3,642.1	4.7	+3.7	5,465.0	4.1	+3.8
Asia Pacific	1,162.7	5.0	+5.8	2,001.0	4.0	+5.0
Southeast Asia	106.7	4.4	+5.8	182.0	3.1	+4.9

*2015-25 annualised real growth adjusted for inflation.

WHICH TYPE OF TOURISM GROWTH?

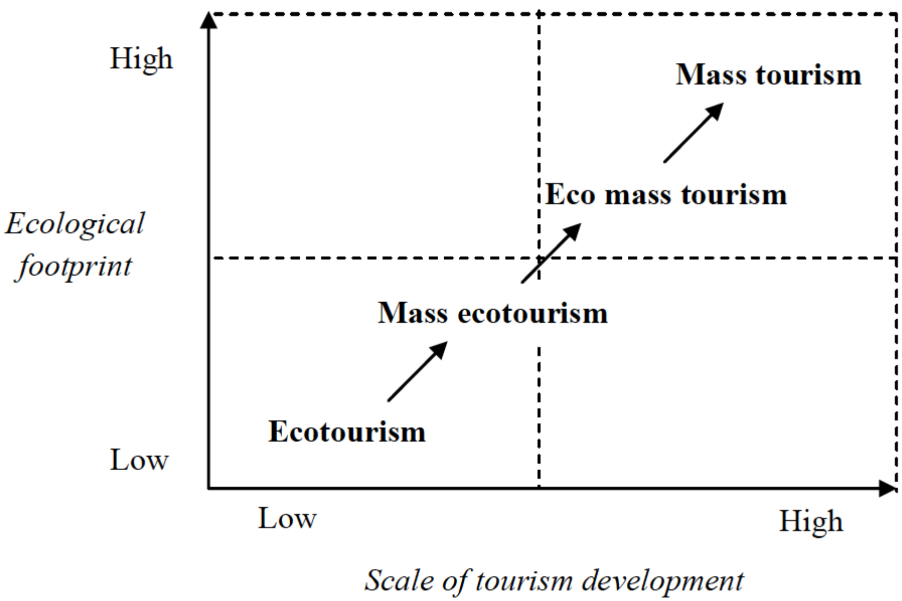
Some Challenges with Mass and Mainstream Tourism Development

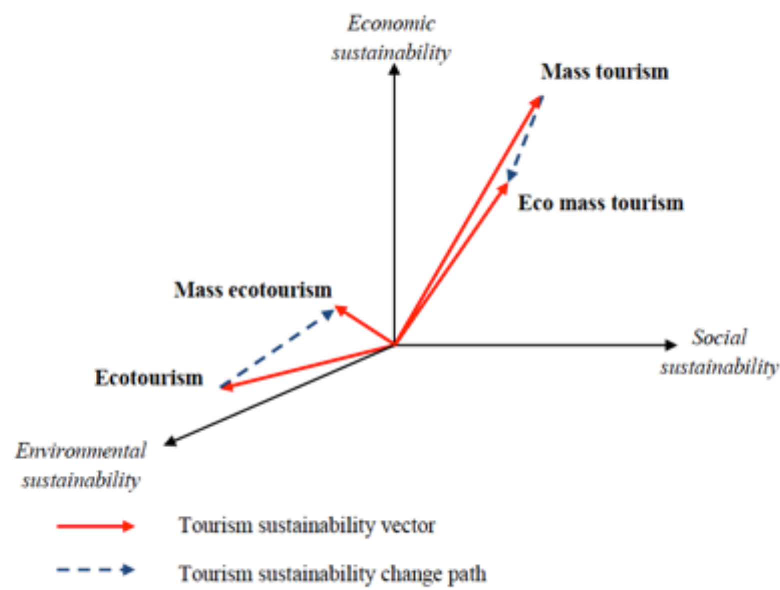
1) Overwhelming pressure on the existing carrying capacity of local resources;
2) Rapid unplanned and exploitative development of coastal areas;
3) Extreme pressure on already under-resourced Government structures;
4) Pressure on the existing resources of human capital within the tourism industry;
5) 'Leakage' of tourism's potential economic benefits;
6) Cultural degradation;
7) Introduction or exacerbation of 'societal ills';
8) Direct environmental degradation;
9) Higher overall economic and social cost to service each tourist.

WHICH TYPE OF TOURISM GROWTH?

Scale of Tourism Development/ Ecological Footprint (SDEF) Grid & Tourism Sustainability Vectors

Source: Ivanov, S., & Ivanova, M. (2013). Mass Ecotourism vs. Eco mass tourism.





An opportunity for a more balanced Tourism Industry

- As detailed in the report, a great opportunity exists to start a journey towards a more balanced tourism industry in the Coral Triangle.
- The potential scale, proportion and type of Nature-based Tourism varies in each country, but, whatever form in might take each country starts with that potential clearly ahead of it.

THE OVERALL OPPORTUNITY FOR NATURE-BASED TOURISM

+ Nature-based Tourism is often called out as **the fastest growing tourism segment globally**, has inherently higher-value per visitor than more mainstream forms of tourism, and is notably more resilient to the periodic downturns that impact tourism due to economic, societal, health or environmental reasons.

+ Underpinning all this is its **much lower overall impact on the communities and environments of host countries** and a real potential for it to help **accelerate a country's development path** over a sustained period of time.

Current and Forecast Value of Nature-based and Adventure Tourism (2015 vs. 2035)
Sources: UN Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council, CTI-CFF Countries

REGION/ SCALE	Estimated Value in 2015			Forecast to 2035*		
	Total Tourism Market (US$)	Nature/ Adventure-Based Tourism		Total Tourism Market (US$)	Nature-based & Adventure Tourism	
		20% Share (US$)	25% Share (US$)		35% Share (US$)	45% Share (US$)
Global	$1,246 billion	$249 billion	$311.5 billion	$2,214 billion	$775 billion	$996 billion
Asia Pacific	$377 billion	$75.5 billion	$94.3 billion	$670 billion	$234.5 billion	$301.5 billion
Coral Triangle (CTI-CFF Countries)	$98.7 billion	$19.7 billion	$ 24.7 billion	$454.3 billion	$159 billion	$204.4 billion

*2035 forecast is modelled on UN, WTTC and CTI-CFF Country data. Given the wide variety of variables, it should be taken as indicative only.

THE OVERALL OPPORTUNITY FOR NATURE-BASED TOURISM

+ Looking at the estimated current size of Nature/Adventure-Based tourism, it is clear that, **as well as being a rapidly growing segment, this is already an established market** – even if the exact numbers should be viewed with caution because of the current lack of segmented global data.
+ At somewhere between **US $19.7 billion – US $24.6 billion** in the Coral Triangle Countries, this places the size of the total Coral Triangle Nature/ Adventure-Based Tourism market as already equivalent to Malaysia's total domestic and international tourism market's combined (estimated at US $25 billion in 2013/14.
+ Looking ahead to 2035, the upper estimated range of US **$204.4 billion** would make the Nature/ Adventure-based tourism sector twice the current size of all 6 CTI-CFI countries total international and domestic tourism industries. To put it mildly, there is clearly potential available to be unlocked.

EMERGING TRENDS RELEVANT TO NATURE-BASED TOURISM

Emerging trends in Visitor Motivations and Behaviour

Source: The Association of Southeast Asian Nations. ASEAN Tourism Marketing Strategy (ATMS) 2012-2015.

1 EXPERIENTIAL TRAVEL	2 THE GREEN MOVEMENT	TOURISM AS EXPERIENCE	THE DEMAND FOR PUBLIC PROGRAMMING	THE CREATIVE INDUSTRIES
3 THE REDEFINITION OF BACKPACKING	THE 3 NEW S's	4 INCREASING IMPORTANCE OF NICHE/ INTEREST/ ACTIVITY BASED TOURISM	THE GROWNG TREND OF CITIES AS ATTRACTIONS	5 VOLUNTOURISM

Key Tourism Indicators in the 6 Coral Triangle Countries Part A

Sources: World Bank, United Nations Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council

COUNTRY	Est. Value of Tourism (% GDP)	WTTC Rank Size	WTTC Rank Growth	Visitor Arrivals (2005)	Visitor Arrivals (2013)	Rate of Increase (%)	Target Arrivals (Per/ yr.)	Spend/ Visitor (US $ - 2013)	Contribution to GDP (US $ - 2035)
Timor-Leste	1.5% (2015)	*Not Ranked*		14,000 (2006)	58,000	+314%	N/A*	$982.76	No forecast data available
Solomon Islands	5% (2015)	178	106	9,000	24,400	+171%	32,500 by 2019	$2,803.28	$0.4 billion
Papua New Guinea	3% (2015)	161	15	69,000	174,000 (2012)	+152%	415,000 by 2017	$1,208.33	$2.1 billion
Philippines	11.2% (2014)	36	47	2.6 million	4.7 million	+78%	5.5 million (Torres 2015)	$1,794.49	$53.9 billion
Indonesia	9% (2014)	17	12	5.0 million	8.8 million	+76%	10.5 million	$1,167.92	$212.1 billion
Malaysia	14.9% (2014)	26	39	16.4 million	25.7 million	+57%	29.4 million	$1,737.26	$185.5 billion
TOTALS	**9%** Global Average	Out of 184 Countries		**24.1 million**	**39.5 million**	**63%**	**46 million+**	**$1,615.67**	**$454.3 billion**

*Timor-Leste's Strategic Development Plan 2011–2030 only states that the 2030 target is "a large number of international visitors".

Key Tourism Indicators in the 6 Coral Triangle Countries Part B

Sources: World Bank, United Nations Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council

COUNTRY	International Tourism Expenditure			Domestic Tourism		Current Estimated Govt. Tourism Budget (US$)
	2005	2013	Growth Rate	# of Trips	Est. Value US $	
Timor-Leste (2006–2013)	US $2.3 million (2006)	US $57 million	+2,378%#	No data available	No data available	US $7.4 million (Currency is US $)
Solomon Islands	US $11.2 million	US $68.4 million	+511%	35,000 (Estimate only)	US $29 million	US $13 million over 5 yrs. (SI $105 million)
Papua New Guinea (2005–2012)	US $56.6 million	US $203 million (2012)	+259%*	375,000 (Estimate only)	US $292 million (2014)	US $6.75 million + US $3.4million for Kokoda (30.2 million Kina)
Philippines	US $3.3 billion	US $8.4 billion	+156%	41 million (2014)	US $17.7 billion (2014)	US $61.4 million (PHP 2.9 billion)
Indonesia	US $4.7 billion	US $10.3 billion	+117%	234 million (2014)	US $36.7 billion (2014)	US $98.4 million (1.3 Trillion Rupiah)
Malaysia	US $4.3 billion	US $12 billion	+175%	217.5 million (2014)	US $16.6 billion (2014)	US $75 million (MYR 316 million)
TOTALS	**US $12.44 billion**	**US $30.96 billion**	**+149%**	**492.9 million**	**US $71.3 billion**	**US $265.4 million**

*Papua New Guinea growth rate measured from 2005 to 2012. #Timor-Leste growth rate measured from 2006 to 2013.

Domestic Tourism in the Coral Triangle: Current Size and Growth (2014–2025)

Sources: World Travel and Tourism Council (WTTC). Travel and Tourism Economic Impact 2015, CTI-CFF Countries

COUNTRY	Current Domestic Tourism			Forecast Domestic Tourism		
	2014		2015	2025		
	Est. Value (US$)	% of Total GDP	Forecast Growth (%)	Est. Value (US$)	% of Total GDP	Growth * (%)
Timor-Leste	*No Data Currently Available*			*No Data Currently Available*		
Solomon Islands	US $29.0 million	2.4%	+2.4%	US $50.7 million	2.7%	+5.5%
Papua New Guinea	US $291.9 million	1.8%	+5.6%	US $531.5 million	1.8%	+5.6%
Philippines	US $17.7 billion	6.2%	+6.5%	US $30.9 billion	6.3%	+5.1%
Indonesia	US $36.7 billion	4.3%	+6.4%	US $65.4 billion	4.3%	+5.3%
Malaysia	US $16.6 billion	5.0%	+5.5%	US $27.7 billion	5.5%	+4.7%
TOTALS	US $71.3 billion			US $124.6 billion		+5.3%

*2015-25 annualised real growth adjusted for inflation.

Key Tourism Indicators for Brunei Darussalam and Singapore (2005–13)

Sources: The World Bank, United Nations Statistics Division, UN World Tourism Organisation, and Country Tourism Boards.

COUNTRY	Est. Value of Tourism (% GDP)	WTTC Rank		Visitor Arrivals (2005)	Visitor Arrivals (2013)	Rate of Increase (%)	Target Arrivals (Per/ yr.)	Spend/ Visitor (US $ - 2013)	Contribution to GDP in 2035 (US $)
		Size	Growth						
Brunei	6.8%	139	158	126,000	225,000	+79%	252,000 (+12%)	US $2,627	US $2.1 billion
Singapore	10.1%	37	57	4.7 Million	11.9 Million	+153%	15.5 million (2015)	US $2,067	US $129.3 billion

International Tourism Expenditure Growth Rates and Estimated Government Tourism Budgets for Brunei and Singapore (2005–13)

Source: The World Bank, World Development Indicators unless otherwise indicated.

COUNTRY	International Tourism Expenditure			Domestic Tourism		Current Estimated Govt. Tourism Budget (US$)
	2005	2013	Growth Rate	# of Trips	Est. Value $	
Brunei	US $374 million	US $591 million	+63%	3 million	US $411.1 million	US $212,660 (B$ 300,000)
Singapore	US $10.1 billion	US $24.6 billion	+144%	7 million (Estimated)	US $8.4 billion	US $25.5 million (2015)

Brunei Darussalam

From a Nature-based Tourism perspective, Brunei has made recent public statements on its importance.

'In an effort to develop the tourism industry, the Ministry of Industry and Primary Resources (MIPR), through the Department of Tourism Development, is aiming to brand Brunei as a country of prestige focused on its natural environment.'

An overview on the Brunei Darussalam Government's overall approach to tourism is available via: [http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/brunei_presentation_2.pdf]

Singapore

Singapore meanwhile has called out a focus on 'Quality Tourism' & growing yields (in part due to growing impacts).

'Amidst the trends, opportunities, and challenges, the Singapore Tourism Board envisions the type and nature of tourism development it wishes to pursue as Quality Tourism.'

An overview of the Singapore Government's overall approach to tourism is available via: [https://www.stb.gov.sg/news-and-publications/publications/Documents/TIC_Discussion_Paper.pdf]

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A brief overview of the Coral Triangle Brand Landscape

On first investigating the current Coral Triangle brand landscape, 2 things quickly become apparent:

1) **There are a range of disparate organisations and companies using Coral Triangle branding** of one kind or another throughout the region – although the total number is comparatively small; and

2) **Few of them are actually truly consumer facing** from the point of view of capitalising on some of the commercial opportunities that a brand connected to the Coral Triangle could potentially do.

Then if you start to dig deeper into existing tourism brands specifically connected to the Coral Triangle, what strikes you next is the fact that **there are very few, if any, credible tourism brands operating at scale** across the Coral Triangle.

There are some examples of small-scale operators (especially diving) and individual tourism offerings, but very little that actually fully brands the Coral Triangle as **'a uniquely desirable region in which to travel and enjoy some of the world's most biodiverse marine environments'.**

Even after spending a considerable amount of time researching the Coral Triangle region for this baseline report, this finding is still surprising. In commercial terms, at an estimated **US $122.7–US $148.3 billion in value by 2035** for Nature-based and Adventure Tourism alone, **this opportunity remaining largely untapped till now seems highly improbable**, and it is certainly difficult to see the opportunity not being utilised more comprehensively in the very near future.

Summary Table of Current Coral Triangle Brands, Organisations and Initiatives

Various online sources

ORGANISATION	LOGO/ BRANDING	DESCRIPTION	WEBSITE
Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security	CORAL TRIANGLE INITIATIVE ON CORAL REEFS, FISHERIES AND FOOD SECURITY	Site for a multilateral partnership of six countries to address the urgent threats facing the coastal and marine resources of one of the most biologically diverse and ecologically rich regions on earth.	www.coraltriangleinitiative.org
The Coral Triangle Amazon of the Oceans	THE CORAL TRIANGLE AMAZON OF THE OCEANS	A non-profit enterprise supported by the WWF that tells the story of this *'million square kilometre marine bioregion in words, pictures & video.'*	www.thecoraltriangle.com
The Coral Triangle Centre	CORAL TRIANGLE CENTER *Ensuring Coral Reefs for Life*	*'A learning centre of excellence in marine and coastal resources management'.* Focused on building local capacity to encourage long-term conservation in the Coral Triangle.	www.coraltrianglecenter.org
The Coral Triangle Atlas	CORAL TRIANGLE ATLAS	Coral Triangle online GIS database, providing governments, NGOs and researchers with a view of spatial data at the regional scale. Supported by multiple partners, http://ctatlas.reefbase.org/partners.aspx	www.ctatlas.reefbase.org
Coral Triangle Regional Business Forum	CORAL TRIANGLE Regional Business Forum	Regional business forum created by the CTI-CFF & other development partners to engage with the private sector to try to encourage business solutions that are both economically profitable and sustainable.	www.ctibusinessforum.net

Summary Table of Current Coral Triangle Brands, Organisations and Initiatives

Various online sources

ORGANISATION	LOGO	DESCRIPTION	WEBSITE
Branding for Coral Triangle Regional Business Forum Bali | August 2015	Coral Triangle The Global Marine Tourism Destination 4th CTI-CFF REGIONAL BUSINESS FORUM NUSA DUA, BALI, INDONESIA, 27-29 AUGUST 2015	Logo specifically created for the 4th CTI-CFF Regional Business Forum held in Nusa Dua, Bali, Indonesia from 27–29 August 2015.	Via CTI Business Forum website details above.
Coral Triangle Support Partnership	CTSP Coral Triangle Support Partnership WWF The Nature Conservancy Protecting nature. Preserving life. CONSERVATION INTERNATIONAL	A partnership of WWF, Conservation International and The Nature Conservancy funded by USAID to support the CTI-CFF governments. Focused on policy, fisheries management, marine protected areas and climate change adaptation.	No standalone website. Overview available via: www.worldwildlife.org/partnerships/coral-triangle-support-partnership
CoralTriangle.org	CORALTRIANGLE.ORG	Site on the Coral Triangle independently authored by Eric Madeja (photographer) and Ken Kassem (ex. WWF). Includes (limited) tourism section.	www.coraltriangle.org
Coral Triangle Adventures	Coral Triangle Adventures	Coral Triangle Tourism operator providing specialised snorkelling tours in the region. Independent and relatively small scale.	www.coraltriangleadventures.com
My Coral Triangle	MyCoralTriangle	WWF campaign site with background content on the CT and opportunity to 'buy a spot' via an interactive map. Also includes overview of WWF's conservation projects.	www.mycoraltriangle.com

#	TOP 10 RANKED SOURCES UNDER SELECTED SEARCH TERMS [Google + Bing 08/12/15]		
	'The Coral Triangle'	*'Tourism in the Coral Triangle'*	*'What are the top 10 places to visit in The Coral Triangle?'*
1	Coral Triangle | Places | WWF worldwildlife.org/places/coral-triangle	WWF | Coral Triangle wwf.panda.org › What We Do › Priority Places	Five Best Places To Swim With Mantas In The Coral Triangle | ATO thecoraltriangle.com/content/.../10/the-five...
2	WWF | Coral Triangle wwf.panda.org › What We Do › Priority Places	The Coral Triangle's Ecotourism Destinations | WWF www.mycoraltriangle.com/coralweb/stories/	The world's best coral reefs | Telegraph www.telegraph.co.uk › Travel › Activity and adventure
3	WWF | Coral Triangle facts wwf.panda.org › What We Do › Priority Places › Coral Triangle, SE Asia	Coastal/Marine Tourism Trends in the Coral Triangle and ... www.responsibletravel.org/.../final_report_alice_crabtree_jan_08.pdf	10 of the world's best snorkeling destinations | CNN.com www.cnn.com/2015/08/09/travel/best-snorkeling-destinations/
4	Coral Triangle | Wikipedia, the free encyclopedia en.wikipedia.org/wiki/Coral_Triangle	Tourism | Coral Triangle www.coraltriangle.org/tourism/Tourism-CoralTriangle-MarineConservati...	Top 10 Best Diving Sites in Indonesia | Indonesia Travel Guide allindonesiatravel.com/top-10-best-diving-sites..
5	The Coral Triangle | ATO (Amazon of The Oceans – ATO) www.thecoraltriangle.com/	4th CTI-CFF Regional Business Forum - Coral Triangle ... www.coraltriangleinitiative.org/events/...	Tourism | Coral Triangle www.coraltriangle.org/tourism/Tourism-CoralTriangle-MarineConservati...
6	Coral Triangle Center Ensuring coral reefs for life coraltrianglecenter.org/	The Coral Triangle | ATO (Amazon of The Oceans – ATO) www.thecoraltriangle.com/	The best coral reefs in the world | Audley Travel www.audleytravel.com › Blog › 2015 › June
7	Coral Triangle | WWF www.mycoraltriangle.com/	About - The Coral Triangle | ATO www.thecoraltriangle.com/about	Coral Triangle | Places | WWF www.worldwildlife.org/places/coral-triangle
8	Coral Triangle Initiative on Coral Reefs Fisheries and Food ... www.coraltriangleinitiative.org/	Coral Triangle | Places | WWF www.worldwildlife.org/places/coral-triangle	The Coral Triangle: Amazon of the Oceans | National voices. nationalgeographic.com/2014/09/18/the-coral-
9	The Coral Triangle Nature Conservation, Environment Issues www.nature.org › Where We Work › Regions › Asia and Pacific	Profit, sustainability in the Coral Triangle | The Jakarta Post www.thejakartapost.com/news/.../profit-sustainability-coral-triangle.html	Top 10 Islands in the Polynesian Triangle | Places To See In ... www.placestoseeinyourlifetime.com/top-10-islands-in-the-polynesian-tri...
10	WWF | Coral Triangle | WWF - Australia www.wwf.org.au › ... › Oceans and marine › WWF's priority ocean places	Sustainable Marine Eco-Tourism and the Coral Triangle ... https://aimwebmarketing100.files.wordpress.com/.../andaya-bhattacharya...	Tubbataha Reef: Exploring the Biodiversity of the Coral ... | WWF wwf.panda.org › ... › Coral Triangle, SE Asia › Facts › Destinations

Summary of Top-Ranked Coral Triangle Brands/ Sources of information (08/12/2015)

Organisation/ Brand	Mentions	%	Ranked in Top 3
1| World Wide Fund For Nature (WWF)	10 (of 30)	33%	5/9 (56%)
2 | Media (5) Daily Telegraph (UK;) CNN; All Indonesia Travel; Jakarta Post; National Geographic.	5 (of 30)	17%	2/9 (22%)
3 | The Coral Triangle Amazon of the Oceans	4 (of 30)	13%	1/9 (11%)
4 | Coral Triangle Initiative [CTI-CFF]	2 (of 30)	7%	-
5= | TheCoralTriangle.org	1 (of 30)	3%	-

Organisation/ Brand	Mentions	%	Ranked in Top 3
6= | The Coral Triangle Centre	1 (of 30)	3%	-
7= | The Nature Conservancy	1 (of 30)	3%	-
7 = | Sustainable Marine Eco Tourism report ('by LT-10B')	1 (of 30)	3%	-
7= | Others (4) Audley Travel, Places to see; Responsible Travel; Wikipedia.	All 1 (4 of 30)	3%	1/9 (11%)

Key Findings

1) **Overall lack of specific coral triangle tourism information** is extremely clear (the **'Brand Vacuum'**).

2) **Much of the overall awareness of the Coral Triangle appears to currently be driven by NGO activity.** 63% of all the online sources featured in the rankings are NGOs, with 10 (33%) being from the World Wide Fund for Nature (WWF) alone – or 47% if you also include the 4 times the 'Coral Triangle, Amazon of the Oceans' site is mentioned (WWF is a partner of this site).

3) **WWF's dominance in terms of driving awareness is reinforced** when looking at the organisations or brands that feature in the top 3 of each category.

Summary of Top-Ranked Coral Triangle Brands/ Sources of information (08/12/2015)

Key Findings (continued)

4) **The 'Coral Triangle, Amazon of the Oceans' site provides the most common initial entry point into tourism** in the Coral Triangle and is, with 13% share of voice, also the 3rd most significant driver of awareness.

5) **The various media outlets combined are the 2nd most significant driver** – especially with regards to the more focused 'What are the top 10 places to visit in The Coral Triangle?' category, where they fill the 2nd and 3rd positions. It is obviously relevant that they are combined however; no one media outlet is particularly prominent in writing about or driving awareness of the Coral Triangle.

6) **The Coral Triangle Initiative (CTI-CFF) features in 4th** with 2 mentions (7%), which is actually a comparatively strong result given its focus is neither consumer facing nor tourism centric.

7) It is also interesting to note that **only one of the CTI-CFF countries (Indonesia via www.allindonesiatravel.com) is actually featured in the table**, indicating both the overall lack of awareness about the Coral Triangle and also illustrating the lack of awareness driving each country has done to date around tourism in the Coral Triangle.

8) **None of the global travel guides feature at all** in the top-level search for the Coral Triangle. Organisations like Lonely Planet and Rough Guides could be expected to feature at least within the top 30 positions – this is an opportunity that could be explored further.

Overall Regional Unprompted Awareness of the Coral Triangle (2012).

Source: Dentsu Asia and GMI. Koga Coral Triangle D-AIR Research.

1) UNPROMPTED AWARENESS

Q52a. Have you ever heard of *'the Coral Triangle'*?

		COUNTRY						
	REGIONAL	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand	Vietnam
No	48%	29%	47%	64%	67%	53%	40%	34%
Not Sure	29%	29%	30%	19%	19%	32%	30%	40%
Yes	24%	42%	23%	17%	13%	15%	30%	26%

	Age Group			Gender	
	18 to 24	25 to 34	35 to 44	Female	Male
No	50%	46%	47%	47%	49%
Not Sure	28%	28%	29%	31%	26%
Yes	22%	26%	24%	22%	26%

Key Findings

1) **Overall unprompted awareness was estimated at 24% in 2012**, with Indonesia demonstrating the highest level at 42% followed by Thailand (30%), Vietnam (26%) and then Malaysia (23%). It is significant that 29% of respondents were 'not sure', a very high level that reinforces the view that there has been neither an integrated marketing push, nor sufficient time for the Coral Triangle (CT) brand to be built.

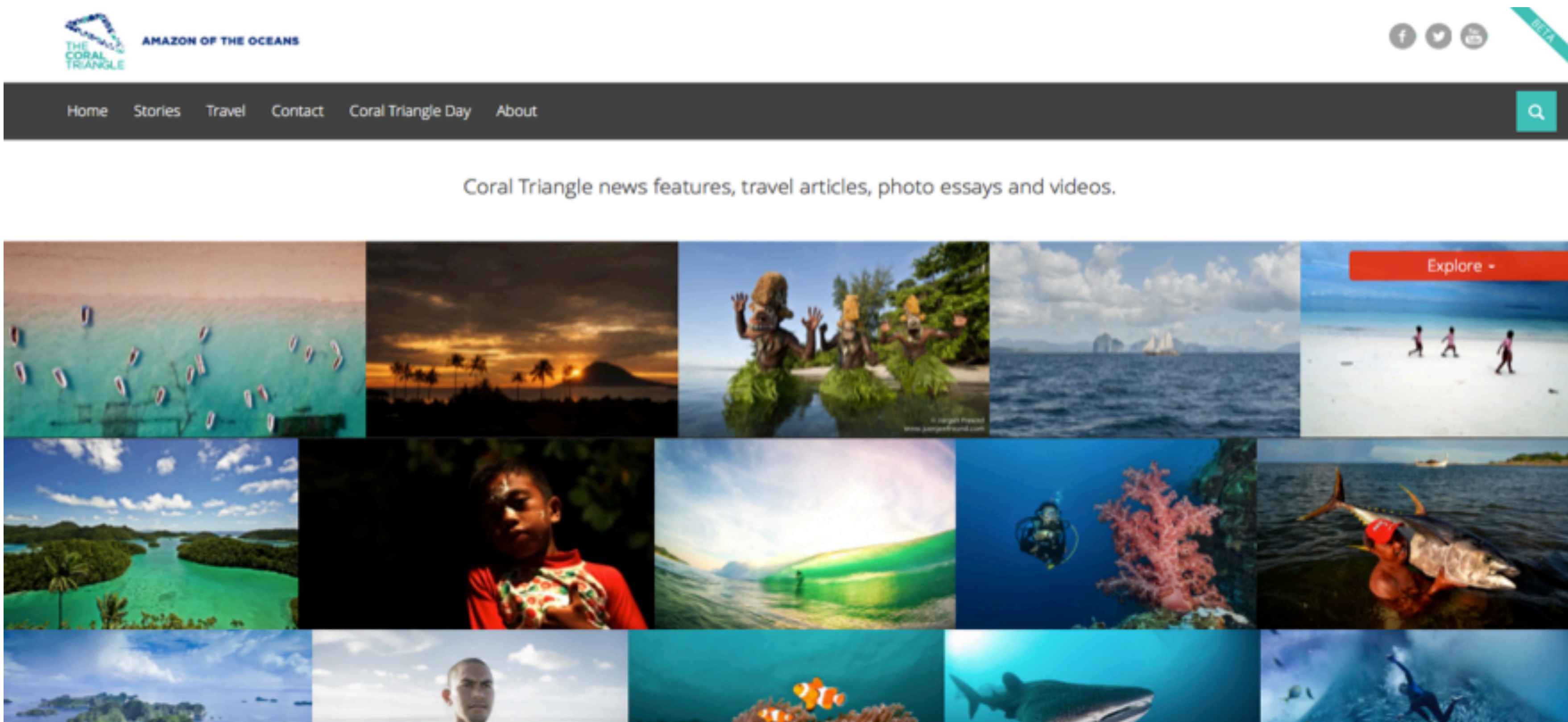
2) From a demographics perspective, **slightly higher numbers of 25–34 year olds were aware of the CT** at 26%, vs. 24% of 35–44 yr. olds and then 22% of 18–24 yr. olds; **Males were also very slightly more likely to have heard of the Coral Triangle** (26% vs. 22%), with more Females being 'not sure' (31% vs. 26%).

The Coral Triangle – Amazon of the Oceans Platform

Whilst it was not originally created with a tourism focus, The Coral Triangle Platform is already:

a) Performing relatively strongly with a **13% share of voice for the Coral Triangle** – with minimal marketing or promotional support, and receiving over 6,000 unique visitors/month;
b) **Providing some strong travel content** (although limited in terms of practical accommodation options); and
c) Past the initial stages of build, so would provide some clear efficiencies in terms of development costs.

It would therefore seem to make strategic (and financial) sense to **explore the potential for building onto this platform**, rather than starting again. Doing this would **also provide some initial structure for a draft brand architecture** to build on.



POTENTIAL FOR A CT NATURE-BASED TOURISM BRAND

© James Morgan | West Papua

Why develop a Coral-Triangle Nature-based Tourism Brand?

It has become clear through the analysis undertaken for this report that there are a number of very clear answers to this question.

1) **There is an obvious need for accelerated socio-economic development** in many Coral Triangle communities (particularly in PNG, the Solomons and Timor-Leste), and a strong potential role that tourism can play to answer this need.

2) **There is rapidly increasing global demand for niche tourism experiences** like Nature-based Tourism and Adventure tourism that a CT NBT Brand could tap into.

3) **All the CTI-CFF countries need to start to transition away from an over-reliance on mass tourism** (and the negative impacts it can bring), towards a more balanced tourism model with a greater proportion of higher yielding tourists.

4) **A clear opportunity exists to use a brand to help leverage the ecological and cultural diversity of the Coral Triangle** to deliver sustainable economic benefits, regional value from the CTI-CFF, and strong incentives for better environmental management in key regions of biodiversity.

5) **There is significant potential value that a well-managed and sustainably grown Nature-based Tourism sector could generate** for all the Coral Triangle countries – one that no tourism brand is currently capitalising on (the 'brand vacuum' highlighted previously).

6) **A Coral Triangle Nature-based Tourism brand could operate as a 'halo brand' for the entire region.** This means that, although the brand would initially focus tightly on promoting specific sites and regions in the Coral Triangle countries, its aspirational nature will ultimately have a net positive impact on promoting the entire region as a tourism destination.

Why develop a Coral-Triangle Nature-based Tourism Brand?

These six areas certainly **provide a strong initial basis for a business case** to invest in a Coral Triangle Nature-based Tourism Brand.

However, the underlying criteria for investing in any brand ultimately rests in what the hard numbers tell you: in simple terms, **what financial return can be expected from a particular strategic investment in any brand.**

Or in the Coral Triangle's case:

What economic value could be generated from a coordinated and concerted effort to develop, sustainably manage, brand and then promote some of the outstanding examples of Nature-based Tourism that either exist, or could be developed, in the region?

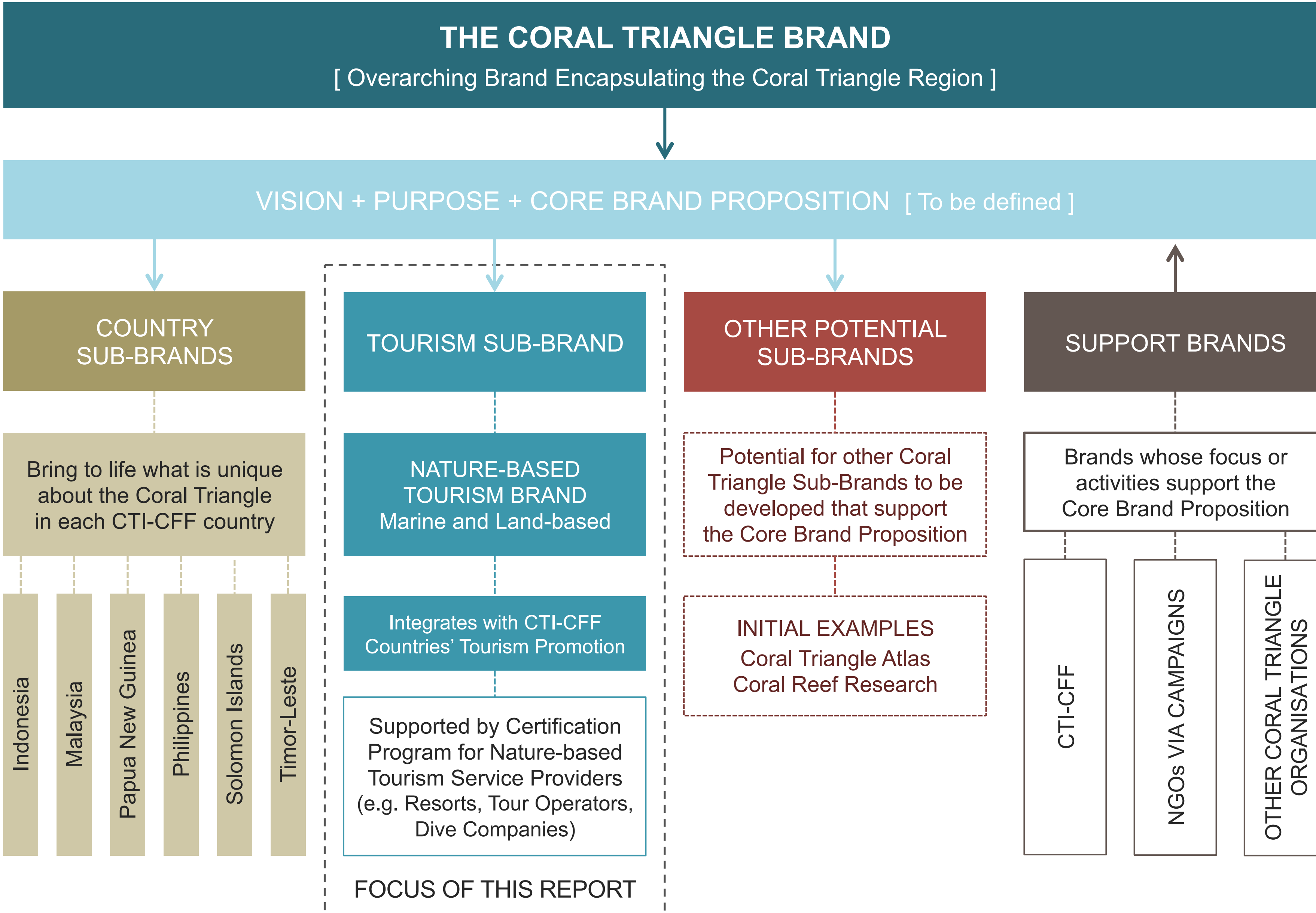
Adjusted 2035 Forecast Value of Nature-based and Adventure Tourism in the Coral Triangle

Sources: UN Statistics Division, UN World Tourism Organisation, World Travel and Tourism Council, CTI-CFF Countries

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

*2035 forecast is modelled on UN, WTTC and CTI-CFF Country data. Given the wide variety of variables, it should be taken as indicative only.

Draft Architecture for potential Coral Triangle Brand and Nature-based Tourism sub-brand



Draft Framework for Nature-based Tourism Brand in the Coral Triangle

(Based on Australian National Landscapes structures and frameworks)

THE CORAL TRIANGLE NATURE-BASED TOURISM BRAND

Nature-based Land + Marine Tourism

[Brand Encapsulating the Nature-based Tourism offering in the Coral Triangle Region]

↑

COUNTRY LEVEL CORAL TRIANGLE NATURE-BASED TOURISM BRANDS

[6 Existing CTI-CFF Countries + Potential additions (Brunei Darussalam, Singapore)]

↑

SELECTED REGIONS FOR NATURE-BASED TOURISM

[Areas identified by CTI-CFF for sustainable NBT development and promotion]

↑

CORAL TRIANGLE NATURE-BASED TOURISM LOCATIONS

[Specific Destinations and Sites for Nature-based Tourism]

↑

Supported by Certification Program for Nature-based Tourism Service Providers (e.g. Resorts, Tour Operators, Dive Companies)

Site Selection

Identifying suitable sites for Nature-based Tourism (particularly in Papua New Guinea, the Solomon Islands and Timor-Leste) early on will obviously be important given they form the basis for the brand proposition that will need to be developed.

There initially seem to be two possible approaches – or potentially a third that involves a combination of the following:

1) Integrate with existing CTMPAs
   The first option for this project could be to consider regions around a selection of the protected areas that have already been screened to become one of the CTI-CFF CTMPAs (Coral Triangle Marine Protected Areas). These are all areas of high regional or global conservation value and have already achieved a certain level of effective management.

2) Integrate with National (Sustainable) Tourism Strategies
   The second option could be to consider provinces or other formal administrative units that have already been identified by the CTI-CFF National Governments for further tourism development, and to then consider which sites in those areas have high conservation values.

Either way, it will be important to retain close links with the conservation and livelihood targets of the Regional Plan of Action (RPoA) for the CTI-CFF. Eventually, this project is intended to support the broader application of Nature-based Tourism tools (developed through the initial sites) to more Coral Triangle areas and sites.

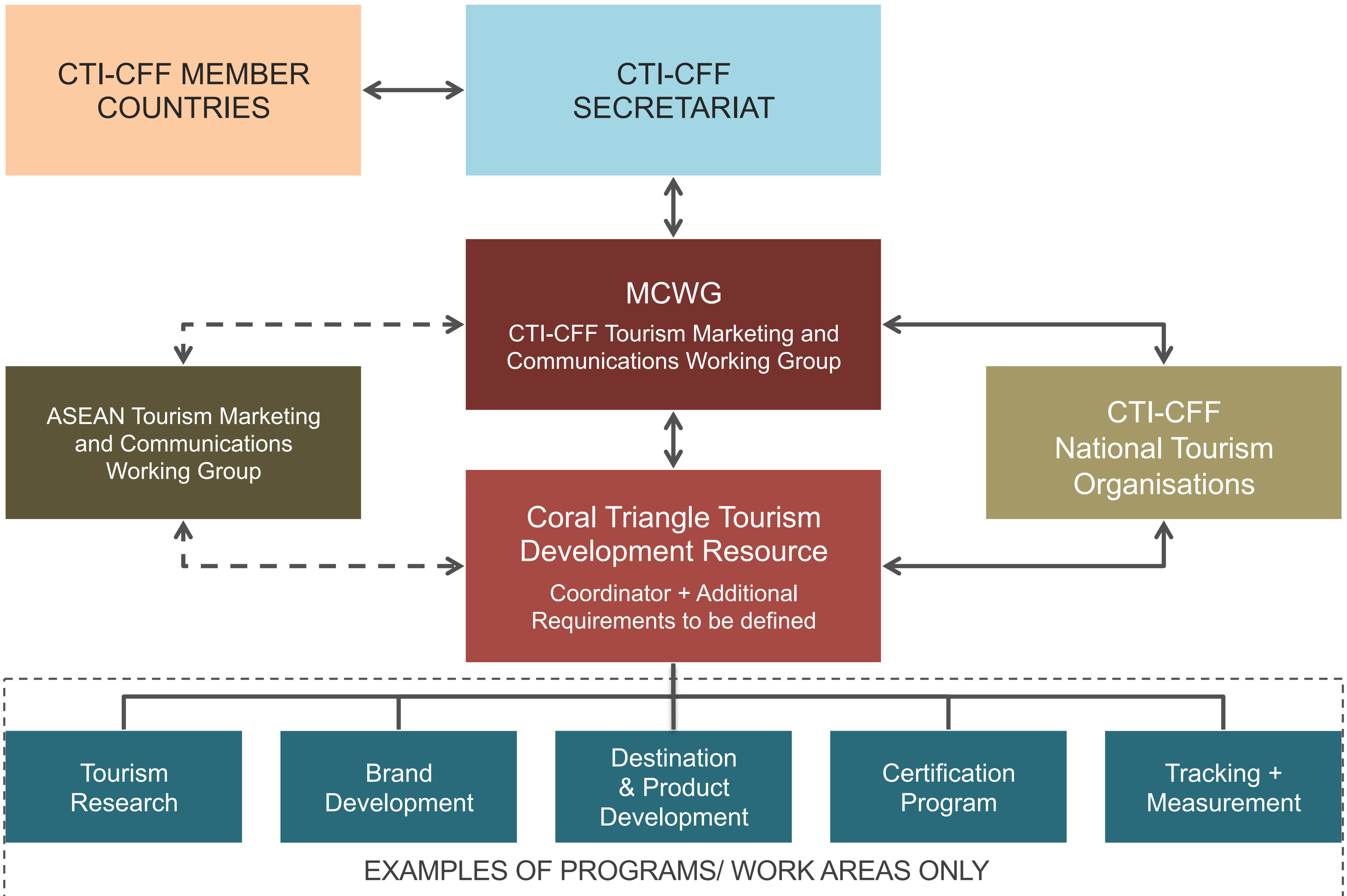
Initial consultations for the selection of destinations in Timor-Leste, Solomon Islands and Papua New Guinea are already underway with a variety of experts and government officials from these countries.

An initial summary of potential sites for NBMT in the Coral Triangle

Country	Region/ Area/ Province	Sites/ Locations
Timor-Leste	- Lautem District - Lesser Sunda Islands - The Eastern Tourist Zone	- Nino Konis Santana National Park including Jaco Island - Atauro Island - Various in this proposed zone
Solomon Islands	- Western Province - Various around the Islands	- Arnavons, the Marova Lagoon and Gizo - Munda, Eastern and Western Marovo, around Honiara, the Florida Islands and Iron Bottom Sound
Papua New Guinea	- West New Britain - New Ireland - The Islands Region - New Britain - Madang	- Kimbe - Milne Bay, Alotau and the islands around Kavieng - The Islands of the Bismarck Sea - Rabaul, Walindi and Hoskins - Various locations in Madang Province
Philippines	- Palawan Province - Sorsogon - Various dive sites	- Palawan Island - Donsol (whale sharks) - Anilao, Apo Island (Reef and Marine Sanctuary), Balicasag, Boracay, Coron, Dumaguete, Malapascua, and Puerto Galera
Indonesia	- Lesser Sunda Ecoregion/ Seascape - Selected dive sites	- Various sites in this seascape. - Komodo Islands, Bunaken Island, Raja Ampat Islands, Bali Islands, Sumbawa and Flores Islands, Lombok Island, Bangka and Belitung Islands, Banda Islands, Wakatobi Islands, and the Sangihe and Talaud Archipelago.
Malaysia	- Saba - Perak - Areas highlighted for diving - Turtle watching sites	- Various including Sipadan and Mabul; Global Biodiversity Hub is also in Sabah. - Matang Mangroves Forest Reserve. - Kuching, Lankayan Island, Lumu, Miri, Perhentian Islands, Redang, Semporna, Sipadan, Tioman, and Tunku Abdul Rahman National Park, Kota Kinabalu.. - Rantau Abang and Tanjung Jara Beach in Terengganu;,Turtle Bay on Pangkor Island.

Initial Structure for a CTI-CFF Nature-based Tourism Institutional Model

(Based on ASEAN MCWG structure)



4 I AREAS FOR FURTHER ANALYSIS
5 I DRAFT ROADMAP

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4 | AREAS FOR FURTHER ANALYSIS

Summary of Key areas for further analysis identified in report conclusions

a) Future Tourism Mix in the CTI-CFF Countries.

b) Institutional Structures for multi-country tourism initiatives.

c) Nature-based Tourism Data and Analysis.

d) Brand Development + Measurement.

5 I DRAFT ROADMAP FOR 2016–17

| GROWING A NATURE-BASED MARINE TOURISM BRAND | A 2-year Perspective |

	2016	2017
1 | Business Case Research + Development	Further Analysis + Consultation; Develop + Communicate Business Case	Ongoing Refinement of Business Case + Continued Investor Engagement
2 | Coral Triangle Nature-based Tourism Site Selection/ Development	Site Selection + Screening; Destination Management Planning for sites in PNG, Solomons + Timor-Leste	Destination Management Planning for sites in PNG, Solomons + Timor-Leste (continued); Ongoing Site Identification/ Management
	Potential inclusion of Indonesia, Malaysia + Philippines	
3 | CT NBMT Certification Model	Research + Develop Coral Triangle NBT Certification Model + Branding	Consultation, Refinement + Implementation
	Integrated with Site Selection , Screening + Destination Management Planning	
4 | Brand Development	Develop Brand Architecture, Vision, Purpose, Overall Positioning + Sub-brands	Refine based on Site Selection/ Development + Develop Marketing Strategy
5 | Nature-based Tourism Research + Analysis	Potential Research into Optimal Tourism Mix for CTI-CFF Countries; Ongoing Tracking + Measurement	Ongoing Tracking + Measurement (continued)
6 | CTI-CFF Institutional Structures	Explore/ Consult on opportunity for MCWG for CTI-CFF Countries; Develop Optimal Institutional Structure	Deploy Structure (Integrated with CTI-CFF + National Tourism Organisations)
	Explore Opportunity for Dedicated Resource early to assist in the overall project	
7 | Capacity Building	Build understanding of Coral Triangle Brand opportunity + overall strategy amongst CTI-CFF (key learning from Australian National Landscapes)	Build understanding of Coral Triangle Brand opportunity + overall strategy amongst CTI-CFF (continued)
8 | Overall Communications and Marketing Development	Development Phase	Test and Refine Phase; Initial Consumer Campaign (TEST)

6 I DISCUSSION AND QUESTIONS

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‘It is my hope that by planting the seeds in developing the Coral Triangle as a sustainable marine tourism destination, future generations 100 years from now will stand amongst the shores of the Coral Triangle and be in awe of the legacy of a pristine coastal and marine environment that we will have left behind.’

U.S. Ambassador to Indonesia Robert Blake
4th CTI-CFF Regional Business Forum, August 27–29, 2015

© James Morgan I Spinner Dolphins, Tetepare Island

PROJECT PARTNERS

The Coral Triangle Initiative on Coral Reefs, Fisheries & Food Security (CTI-CFF)

The Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security (CTI-CFF) was established in 2009 to support the protection of the region's values and sustainable use of its marine resources. The CTI-CFF is a multilateral non-binding partnership agreement between 6 countries (Indonesia, Malaysia, Papua New Guinea, Philippines, Solomon Islands, and Timor-Leste).

A key challenge of the CTI-CFF is to ensure agreements that evolve at high levels deliver benefits to local economies and communities. To help achieve this, a key objective of the CTI-CFF is to encourage industries that depend on the CT's resources, like Tourism, to start co-investing in the ocean's natural capital, thereby securing their business and supporting food and jobs for coastal societies.

The Australian Government

The 'Developing and Promoting Sustainable Nature-based Tourism in the Coral Triangle' Project, of which this report is part of, is supported through funding from the Australian Government's Coral Triangle Initiative Support Program. Australia has been a partner of the Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security (CTI-CFF) since 2009.

The World Wide Fund for Nature in the Coral Triangle

WWF has been pioneering conservation in the Coral Triangle for more than two decades, collaborating with partners in the private sector, governmental agencies and civil society. By providing technical expertise and funding, and promoting innovative public-private partnerships, WWF is committed to safeguard the health of the region's natural resources and to secure the millions of livelihoods that depend upon them.

James Morgan

Much of the imagery used throughout this report is by James Morgan. James is a multi award-winning film director and photojournalist who has extensive experience working in the Coral Triangle region both independently and in collaboration with WWF. His in-depth photographic features have appeared in National Geographic, The Guardian, BBC, Sunday Times and many others. His images regularly lead campaigns for the World Wide Fund for Nature (WWF) and USAID, and are published and exhibited around the world.

2iis Consulting

2iis is an independent consultancy that helps organisations build strategic solutions to some of the world's more complex challenges. This includes guidance on strategy; research; marketing and brand development; organisational development; sustainability & climate change; partnership creation; and project design & planning. Clients include not-for-profits, social enterprises, businesses, government departments, community organisations, cleantech innovators and academic institutions – and the individuals leading within them.

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Nature-based Marine Tourism in the Coral Triangle

Exploring the potential for low-impact, high-value Nature-based Marine and Coastal Tourism.

Prepared by 2iis Consulting on behalf of WWF-Pacific.

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Carl Solomon and Charlotte Prouse, Directors, Destination Marketing Store
Janet Mackay, Director, TRC Tourism
Johnny Langenheim, Head of Production, Spindrift Creative

The majority of the imagery used throughout this report is by James Morgan. James is a multi award-winning film director and photojournalist. To see more of his work, please visit www.jamesmorgan.co.uk.

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I APPENDIX I

3 I MORE DETAILED LOOK AT KEY AREAS
e) Key Stakeholders

CATEGORY	STAKEHOLDERS/ ACTORS
Coral Triangle Initiative	Coral Triangle Initiative on Coral Reefs, Fisheries and Food Security (CTI-CFF)
National Governments Including CTI-CFF National Coordinating Committees	CTI-CFF Member Countries 1) Indonesia; 2) Malaysia; 3) Papua New Guinea; 4) Philippines; 5) Solomon Islands; 6) Timor-Leste. Other Coral Triangle Countries 1) Brunei Darussalam (7th CTI-CFF Country); 2) Singapore. CTI-CFF Development Partners 1) Australian Government; 2) US Government.
Government Ministries/ Departments *Note: exact Ministries and Departments involved varies from country to country.* *Will require individual country mapping later in the project.*	Primary Ministries/ Departments Ministry of Tourism; Ministry of the Environment; Ministry of Culture; Marine Department/ Ministry; Ecotourism Department/ Ministry; Wildlife/ National Parks Department; Prime Minister's/Presidents Office (or equivalent). Secondary Ministries/ Departments Agriculture/ Fisheries/ Forestry; Employment; Finance; Foreign Affairs; Infrastructure (Roads, Transport, Housing, Town & Country Planning etc.); Primary Industry; Science/ Technology.
Local Government	State, Regional and Provincial Governments/ Councils; Municipal Governments; Local Government; (Indigenous Land Title owners).

e) Key Stakeholders

CATEGORY	STAKEHOLDERS/ ACTORS
Tourism Promotion Boards	- All relevant Tourism Boards within CTI-CFF Countries; - Tourism promotion/ marketing departments and offices. - Source Countries' Tourism Promotion Boards.
Global Tourism Organisations/ Bodies	- ASEAN Tourism Association; - Asia-Pacific Economic Cooperation (APEC) Tourism Charter; - Pacific Asia Travel Association (PATA); - The Global Sustainable Tourism Council (GSTC); - UN World Tourism Organization (UNWTO); - World Travel and Tourism Council (WTTC); - Other Travel/ Tourism Associations (e.g. IATA, TTRA).
Regional Multi-lateral Collaborations	- BIMP EAGA (Brunei Darussalam-Indonesia-Malaysia-The Philippines East ASEAN Growth Area) - SPREP (Secretariat of the Pacific Regional Environment Programme) - MSGSEC (Melanesian Spearhead Group Secretariat)
Coral Triangle Organisations/ Institutions/ Brands	The Coral Triangle (Amazon of the Oceans); The Coral Triangle Centre; The Coral Triangle Atlas; Coral Triangle Regional Business Forum; Coral Triangle Support Partnership; coraltriangle.org; My Coral Triangle.

e) Key Stakeholders

CATEGORY	STAKEHOLDERS/ ACTORS
Other Global Organisations/ Bodies	- International Labour Organisation (ILO); - United Nations Environment Programme (UNEP); - United Nations Conference on Trade and Development (UNCTAD); - World Commission on Protected Areas (IUCN WCPA).
Non-Government Organisations (NGOs)	BirdLife International; Conservation International (CI); Coral Triangle Centre (CTC); Flora and Fauna International (FFI); International Institute for Environment and Development (IIED); The Earthwatch Institute; The International Ecotourism Society (TIES); The Nature Conservancy (TNC); Wetlands International; Wildlife Conservation Society (WCS); Worldwide Fund for Nature (WWF).
Aid Agencies/ Potential Institutional Support	Australian National Landscapes Program; Association of Southeast Asian Nations (ASEAN); Asian Development Bank (ADB); USAID; World Bank.
Local Communities and Businesses	- Business owners – both directly and indirectly involved in tourism; - Local handicraft makers producing tourist souvenirs; - Local NGOs/ business forums/ civic bodies. - Local populations – either potentially benefiting or being impacted by tourism development.

3 | MORE DETAILED LOOK AT KEY AREAS
e) Key Stakeholders

CATEGORY	STAKEHOLDERS/ ACTORS
Tourism Industry	- Expedition outfitters, recreational equipment manufacturers; - Financial services companies catering to tourists; - Hotel and restaurant chains; - International Hotel and Restaurant Association (IHRA); - International Council of Cruise Lines (ICCL); - Professional Association of Diving Instructors (PADI); - Tour Operators, incl. International Federation of Tour Operators (IFTO); - Travel agents; major tourism companies and travel insurers; - Online travel providers, e.g. booking.com and tripadvisor.com
Tourists and Potential Visitors	- Existing tourists – International and Domestic; - Target countries potential tourist populations: short, medium & long haul.
Investors and Potential Investors	- Corporates/ Corporate Foundations (e.g. Kathmandu). - Private Foundations and Trusts (e.g. Innovation Funding); - Cruise Ship Operators; - Hotel Chains and Travel Companies; - Individuals (e.g. wealthy business or political leaders/ citizens who want to create long-term legacy); - Previous Aid Funders (e.g. Australia Aid; Global Environment Facility–GEF; USAID; UNDP);
Other Potential Stakeholders	- Airlines and transport providers; - Airports (privately owned); - Labour Unions; - Media Organisations, e.g. Travel Media; - Publishers, e.g. Lonely Planet (BBC).

4.1 Nature-based Tourism statistics and analysis

a) Nature-based Tourism Data and Analysis

Given the current growth and potential for Nature-based Tourism, it is surprising that more in-depth studies have not been undertaken.

Whilst it is sufficient for the project's immediate needs, a strong case could be made for the need to undertake some specific, more-detailed research into the current state of Nature-based Tourism in the region.

Given the potential scale of it, approaching the UNWTO or WTTC could be considered.

b) Nature-based Tourism Opportunity in each Country/ Future 'Balanced Tourism' Mix

Given the significant scope of this initial baseline analysis, only a topline look could be taken at each CTI-CFF country's Nature-based Tourism opportunity. This is also connected to the above point on the general availability and statistical reliability of current Nature-based Tourism data.

Further analysis is certainly required – potentially in collaboration with the national tourism statistics bodies in the CTI-CFF countries.

The ideal would be to more accurately model the optimal mix of tourism types for each country (e.g. Nature-based vs. eco vs. mass eco vs. mainstream etc.)

c) Scale of Tourism Development/ Ecological Footprint (SDEF) Grid

The model looking at mass Ecotourism and eco mass tourism (Ivanov, S., & Ivanova, M. 2013. Mass Ecotourism vs. Eco mass tourism) briefly touched on in Section 6.4 of the report is certainly worth analysing further to help inform both the points above.

4.2 CTI-CFF Country specific gaps/ areas for further analysis

a) Strategy to Implementation Gap
There appeared to be a consistent theme across the countries of having clear and well-thought out strategy documents, but then inconsistent and/ or ineffective implementation.

This area is definitely worthy of further study to validate this hypothesis and potentially make some recommendations to help rectify the issue into the future, if found to be the case.

b) Inconsistent Metrics across the CTI-CFF countries
It was sometimes challenging to fairly compare countries because of a lack of standardisation of measurement. Identifying a standard format of tourism metrics for the CTI-CFF (and potentially creating 'dashboards' of metrics that are reported against regularly) could be of benefit over the longer-term.

c) Philippines Tourism Promotion Campaign
Given the award-winning nature of the 'It's more fun in the Philippines' campaign, it would be beneficial to analyse the campaign in detail as a way of informing future plans for the potential CT NBT brand.

d) Malaysia and Philippines past analysis
It would be interesting to learn more about the detailed modeling undertaken by Malaysia for their *Economic Transformation Programme: a Roadmap for Malaysia (ETP)* and the Philippines for their *National Ecotourism Strategy 2013–2022 (NES).*

It could also be interesting to see whether Malaysia's ongoing focus on Nature and Adventure-based Tourism has been contributing to Malaysia's higher than average spend/ visitor over the long-term.

4.2 CTI-CFF Country specific gaps/ areas for further analysis (continued)

e) Brunei Darussalam and Singapore

Further analysis of Brunei Darussalam and Singapore's tourism markets was outside the scope of this project, but would be a worthwhile additional study to complete the overall picture of the Coral Triangle region.

4.3 Coral Triangle brand analysis

a) Overall CT brand health measures

Given there has never been a need to track the overall Coral Triangle brand in a holistic way, the current level of data is extremely limited.

An initial study will be required along with an ongoing system to track brand scores across the region. It would be most logical for whichever organisation/ ends up running the Coral Triangle Tourism brand to have overall accountability for this brand tracking and measurement (e.g. the suggested CTI-CFF Tourism Marketing and Communications Working Group).

4.4 General areas for potential further study

a) Potential Investors in Coral Triangle Nature-based Tourism
In building the business case, it will be useful to learn more about who is currently invested in Nature-based Tourism in the Coral Triangle to help attract others. For example: what are their motivations, why did they first invest, how did they find out about the opportunity?

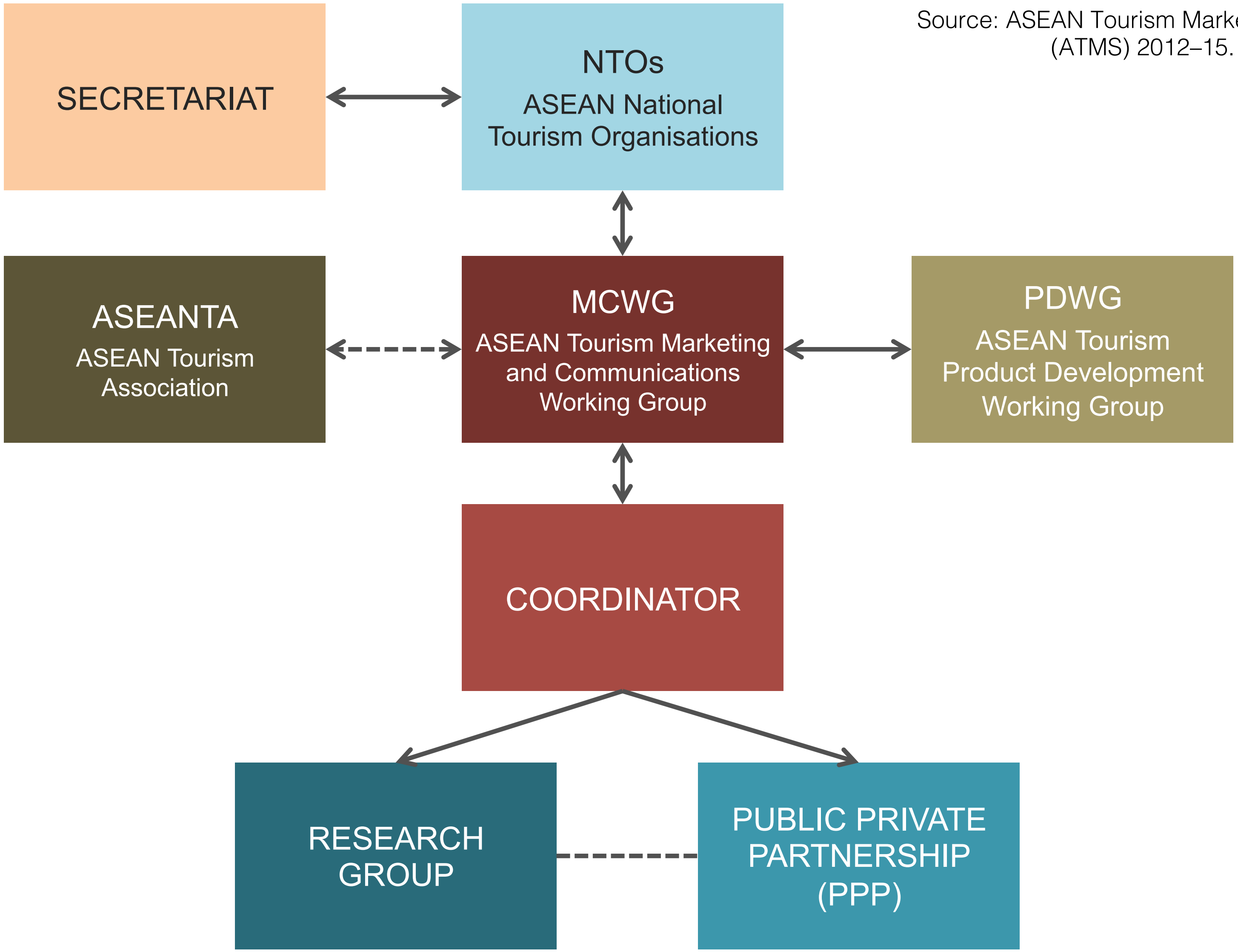
b) Institutional Structures for multi-country tourism initiatives
It is clear that the success of any Coral Triangle brand marketing would rely heavily on the structure used to underpin it. Further detail on Europe 2020 and Australia's National Landscapes Program would be beneficial to understand the exact structure of the governance and funding agreements.

c) Partnership with International Tourist Guide Publisher
The gap in overall promotion of the Coral Triangle as a region in travel guides is apparent. There could be potential to partner with an organisation like the Lonely Planet/ BBC on a region specific guide.

This could also be worthy of investigation as part of the brand architecture process to get some insight into best practise from a tourism branding point of view (i.e. which countries or regions market themselves particularly well in Lonely Planet's opinion?)

Structure of ASEAN Tourism Marketing and Communications Working Group (MCWG)

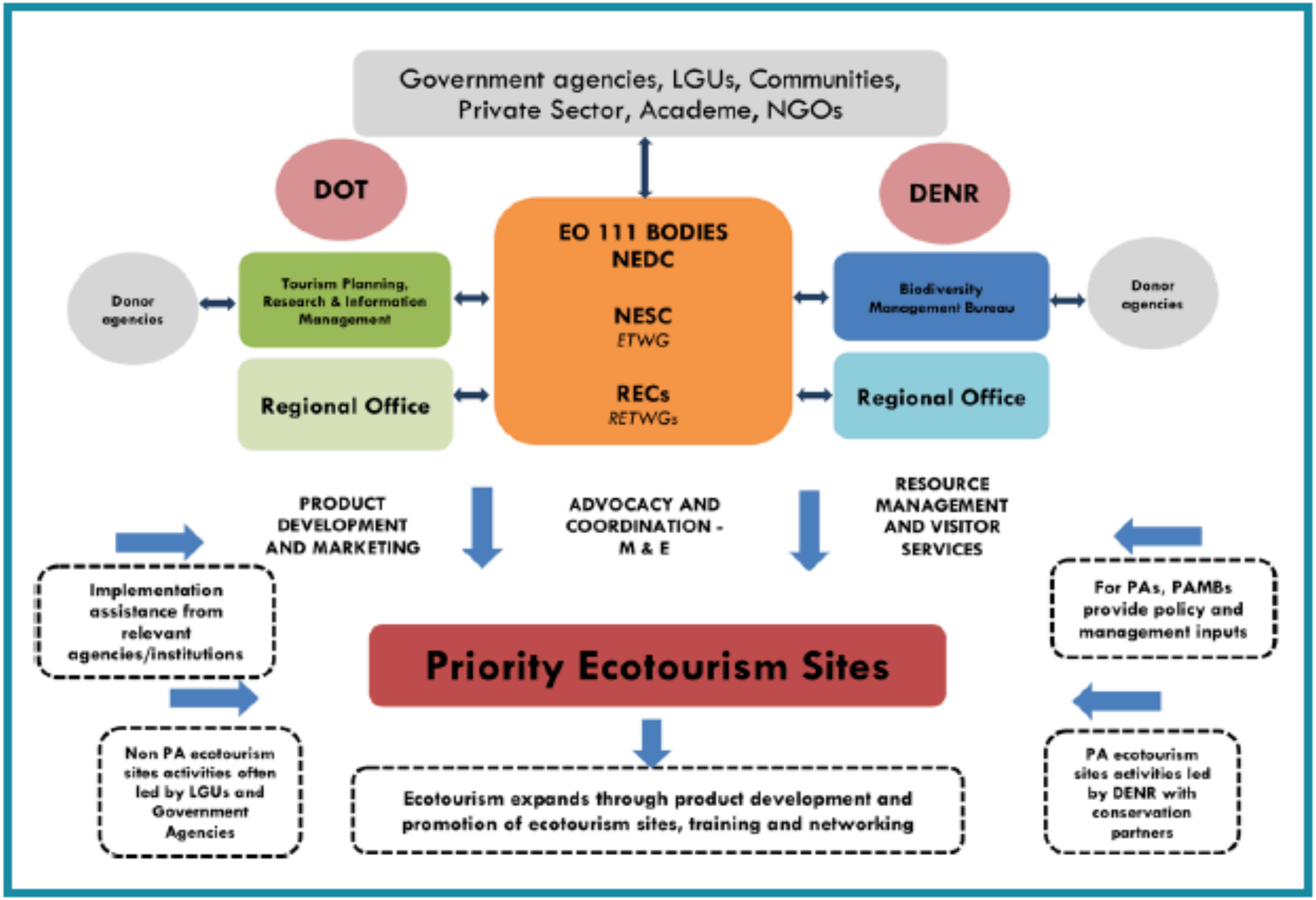
Source: ASEAN Tourism Marketing Strategy (ATMS) 2012–15. 2011: pp. 65.



Key Actors and Stakeholders in Ecotourism Development in the Philippines

Source: Biodiversity Management Bureau (BMB), Department of Environment and Natural Resources (DENR) and Department of tourism (DOT). National Ecotourism Strategy & Action Plan 2013-2022. P. 58

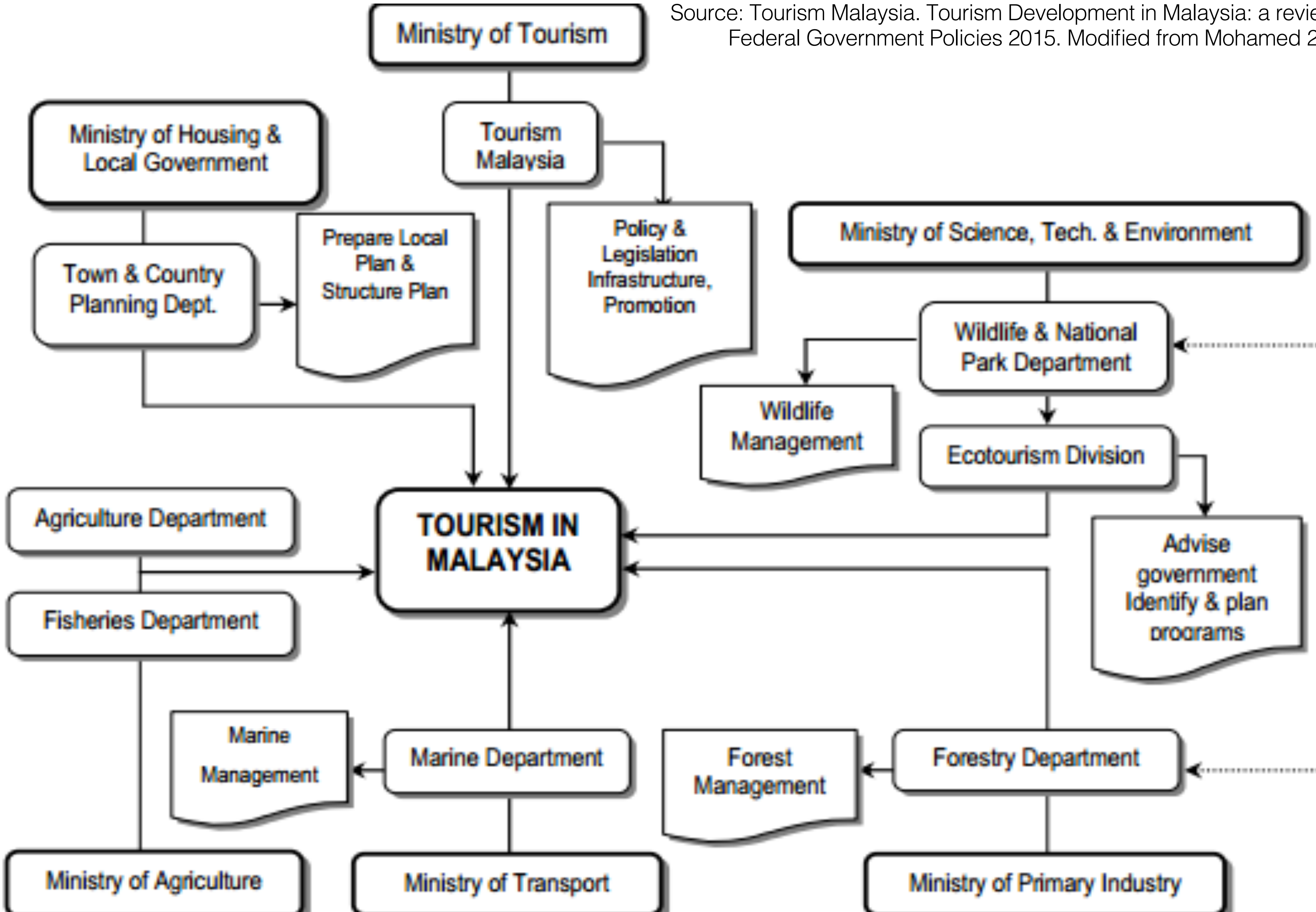
Institutional Relationships in Implementing the Philippines National Ecotourism Strategy



Source: Biodiversity Management Bureau (BMB), Department of Environment and Natural Resources (DENR) and Department of tourism (DOT). National Ecotourism Strategy & Action Plan 2013-2022. P. 58

Overview of the Malaysian Government Departments Involved in Tourism.

Source: Tourism Malaysia. Tourism Development in Malaysia: a review of Federal Government Policies 2015. Modified from Mohamed 2002.



Population Statistics of CTI-CFF Countries

Source: Asian Development Bank. Regional state of the Coral Triangle—Coral Triangle marine resources: their status, economies, and management. 2014: pp. 1.

Key Features	Indonesia	Malaysia	Papua New Guinea	Philippines	Solomon Islands	Timor-Leste	Total
Population (2009)[a]	231,370,000	27,900,000	6,348,000	92,226,600	515,870	1,039,936	359,400,406
Mean annual population growth rate (%)[b] (2007–2011)	1.4	1.8	2.8	1.8	2.3	2.4	1.7
Land area (km^2)[c]	1,900,000	329,847	460,000	300,000	28,000	14,874	3,032,721
Population density (people/land area [km^2]), (2009)	122	85	14	307	18	70	119
Population living within 10 km of the coastline[d]	64,783,600	8,928,000	1,460,040	43,346,502	433,331	551,166	119,502,639
Percentage of population living within 10 km of the coastline (%)[d]	28	32	23	47	84	53	33

km = kilometer, km^2 = square kilometer.

Sources:

[a] Asian Development Bank (ADB). 2011. *Key Indicators for Asia and the Pacific 2011*. Manila.

[b] ADB. 2012. *Key Indicators for Asia and the Pacific 2012*. Manila.

[c] Country State of the Coral Triangle reports.

[d] Center for International Earth Science Information Network (CIESIN). 2007. CIESIN. National Aggregates of Geospatial Data: Population, Landscape and Climate Estimates, v.2 (PLACE II), Palisades, NY: CIESIN, Columbia University.

Nature-based Marine Tourism in the Coral Triangle

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Baseline Analysis Summary
Sydney Workshop, 14–15 January 2016

Produced by 2iis Consulting in collaboration with

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ON CORAL REEFS, FISHERIES AND FOOD SECURITY