



SOUTH PACIFIC

# Cultural & Heritage

STUDY REPORT 2014



South Pacific Tourism  
ORGANISATION



Kindly supported by the European Union  
Pacific Regional Tourism Capacity Building Programme



# SOUTH PACIFIC NICHE MARKET REPORT



## CULTURAL HERITAGE TOURISM

March 2014

**South Pacific Tourism**  
ORGANISATION

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# EXECUTIVE SUMMARY

Where do cultural heritage visitors come from?

**360 million** tourism trips annually

Key markets to South Pacific:



Australians and New Zealanders go to Europe and Asia

What does a cultural heritage holiday involve?



Main Activities:

Culinary, festivals and events, historic sites, music and dance, religious venues and sightseeing, village tours

Top Destination:



Length of Trip:

	Germans average 16 days		Americans average 7-10 days
	UK average 14 days		Australians and New Zealanders: one day tours

	Cost: from US\$ 4,000
	average US\$ 9,000
	day tour from US\$ 50

Who goes on cultural heritage holidays?



Motivated cultural tourists: self-development and learning primary purpose of trip.



Largest segment:

55+ year olds - cash and time rich 'grey market'.



Incidental cultural tourists: take part in cultural heritage activities as one part of trip.

Why is a cultural heritage holiday in the South Pacific special?



For Europeans and North Americans the South Pacific's attraction is:

- Welcoming People
- Unspoilt Tribal Culture
- Unique culture
- Nature
- Security
- The other side of the world



For Australian and New Zealanders:

- "It's not unique or special"
- Close to home
- Good value tropical beach destination



For Divers:

- World War 2 history and wrecks

# EXECUTIVE SUMMARY

How do cultural tourists research their holidays?

- Internet research - travel websites
- Personal recommendations
- Tour operator's advice
- Guide books

How do cultural tourists book their holidays?

- Specialist niche tour operators
- 4-6 months
- 4 - 6 months in advance or more
- Direct with airlines and accommodation

Competing Destinations

- The South Pacific's competitors for cultural heritage holidaymakers are:
- South East Asia
- Europe

Indonesia is considered to be the biggest single competitor

- Compared to the South Pacific Indonesia offers:
- A greater diversity of cultures
  - Rich history and built heritage
  - World Heritage Sites
  - Good value
  - Good access from Europe

Constraints

➔ Opportunities

- Limited air routes to more unusual destinations
- ➔ Co-ordinate campaigns with airline capacity

- Cost: airfares and ground costs
- ➔ Create added value

- Low consumer and trade awareness of the cultural heritage in the South Pacific outside PNG
- ➔ Sell the Experience
- Raise cultural awareness
- Inspire a sense of discovery
- Differentiate between islands

- Lack of interest amongst Australians and New Zealanders
- ➔ Create a 'wow' factor for the Australian and New Zealand markets

- Competition from other destinations that have much stronger cultural heritage products
- ➔ Promote World Heritage Sites
- ➔ Develop itineraries and hands-on learning
- ➔ Package culture with soft adventure
- ➔ Focus on quality
- ➔ Train good guides

- Lack of reliable local partners
- ➔ Facilitate trade contacts
- ➔ Train local suppliers to understand international travel trade

Marketing Recommendations

- ➔ Sell the Experience
- Raise cultural awareness
- Move away from the tropical beach perception
- Invite visitors to meet the people
- Inspire a sense of discovery
- Differentiate between islands

- ➔ Tailor marketing campaigns to individual territories
- ➔ Target the Soft Adventure market

- Create active culture
- Target alternative interests
- Engage with social media

- ➔ Sell from Personal Experience
- Support Fam Trips, train international sales agents
- ➔ Trade Activities
- Co-op marketing with tour operators and airlines
- ➔ Build Personal Recommendations
- Exceed customer expectations

## ACKNOWLEDGEMENTS

The authors would like to thank the numerous tour operators and travel businesses across Europe, North American, Japan, Australia and New Zealand who gave us their time and advice to assist us with this study and to enable us to understand their markets.

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## ABBREVIATIONS

AU\$	Australian Dollar	CH	Cultural Heritage
FSM	Federated States of Micronesia	NTO	National Tourist Offices
NZ\$	New Zealand Dollar	PNG	Papua New Guinea
US\$	United States Dollar	VFR	Visiting Friends and Relatives





## 1. INTRODUCTION

### **Study Context**

This study is one of a series of three market studies into major niche tourism markets: cultural heritage and historic tourism, backpacker and dive market segments.

### **Objectives**

These market studies have been designed and carried out to provide practical and actionable market intelligence and guidance to Pacific tourism operators wishing to penetrate these niche markets.

### **Methodology**

The research for this study has involved extensive desk research and primary research with 80 tour operators and tourism businesses in Europe (UK, Germany, France, Italy, Sweden), North America (USA and Canada), Japan, Australia and New Zealand. A mixture of face-to-face and telephone Interviews were conducted together with an online survey.

### ***Definition of Cultural Heritage Tourism***

Cultural heritage tourism describes all tourist trips that include cultural activities, such as visiting monuments, sites and museums, as well as experiences and interaction with local communities, such as attending festivals, local cultural events and visiting markets. It involves travelling to experience the places and activities that authentically represent the stories and people of the past and present.

## 2. TOURISM TO THE SOUTH PACIFIC

### What's In This Section?

- *This section provides an overview of tourism in the South Pacific in 2012. The same data is provided in each of the three niche market reports: backpacking, cultural heritage tourism and diving, to provide a context for each niche market.*

### 2.1 Tourism Performance in 2012

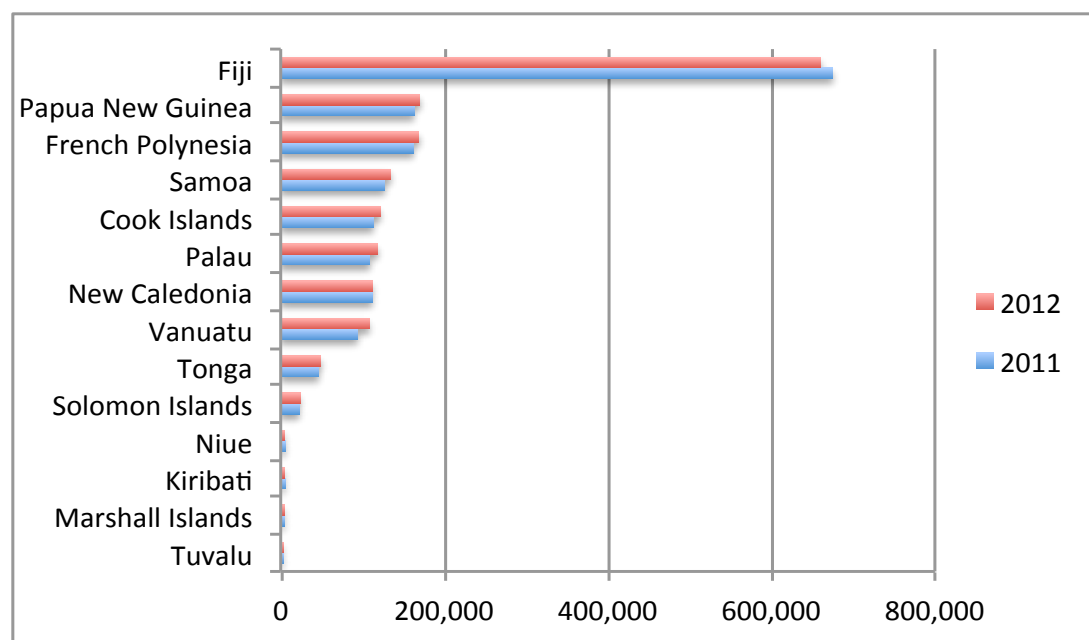
In 2012 the total number of international visitors to the South Pacific countries increased by 2.5%, compared to 2011. The five countries receiving the highest number of international arrivals, for all purposes, during 2012 were Fiji, Papua New Guinea, French Polynesia, Samoa and the Cook Islands.

Fiji continues to attract the largest number of visitors (660,600) although it saw a 2% drop during 2012. The disruption of international flights caused by cyclones Evans and Freda in December contributed to this decline. Other countries that saw a fall in arrivals were Niue (-17%) and Tuvalu (-15%).

The countries that experienced the largest percentage growth during 2012 were Vanuatu (15%), Palau (9%), Cook Islands (8%), Tonga (7%) and Samoa (5%).

In the first quarter of 2013, compared to the same period in 2012, visitor numbers to Fiji continued drop (5%). Samoa also saw a noticeable decline (10%) during the quarter, while Kiribati (39%), the Marshall Islands (23%) and Niue (21%) experienced the largest percentage increases in visitors.

Figure 1: International Arrivals to Pacific ACP and SPTO Countries



Source: SPTO

Figure 2: International Visitor Arrivals to Pacific ACP and SPTO member countries Quarter 1, 2012 and Quarter 1, 2013

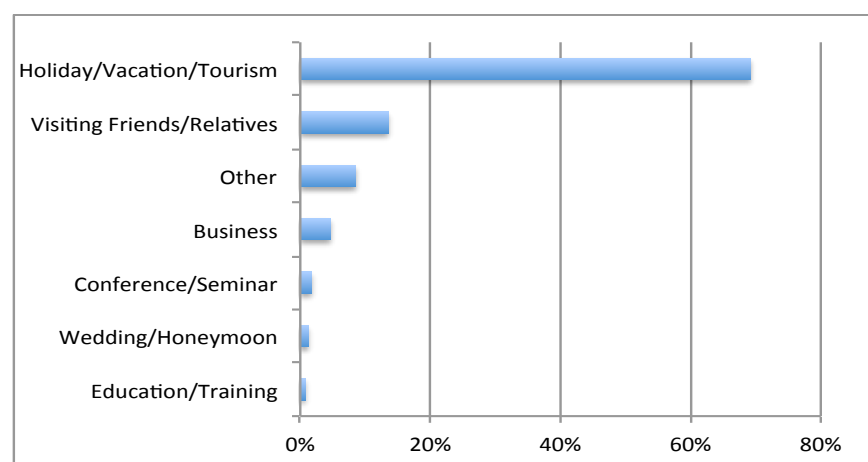
Country	2012 Q1	2013 Q1	Difference	% change 2012 to 2013
Fiji	136,421	129,591	-6,830	-5.0%
French Polynesia	34,836	36,248	1,412	4.0%
Palau	31,647	31,828	181	0.6%
Papua New Guinea	25,238	25,341	103	-0.4%
New Caledonia	25,732	24,289	-1,443	-5.6%
Samoa	25,935	23,297	-2,638	-10.2%
Cook Islands	20,567	20,618	51	0.3%
Vanuatu	19,798	19,520	-278	-1.4%
Tonga	7,913	8,050	137	1.7%
Solomon Islands	4,651	4,541	-110	-2.4%
Kiribati	1,202	1,655	453	38.5%
Marshall Islands	945	1,166	221	23.4%
Niue	660	798	138	20.9%
Tuvalu	238	247	9	3.8%
<b>Total</b>	<b>335,783</b>	<b>327,189</b>	<b>-8,594</b>	<b>-2.6%</b>

Source: SPTO, *Tourist Arrivals to Pacific ACP & SPTO Member Countries, Quarter 1, 2013*

## 2.2 Tourist Purpose of Visit

Holidays are the reason why 69% of visitors travel to the SPTO member countries, however this varies from country to country.

Figure 3: Purpose of Visit to SPTO member countries in 2012



Source: SPTO

Leisure travel accounts for more than 70% of visitors to the Cook Islands, Fiji, French Polynesia, Micronesia, Palau and Vanuatu.

In New Caledonia and Niue leisure is also the main motivation for visitors travelling to these countries, with around half of visitors coming on holiday.

Samoa attracts as many people visiting their family and friends as those who visit on for a holiday.

In Papua New Guinea, business and employment are the main reasons for visiting the country, with only around 20% of visitors travelling to the country for a holiday.

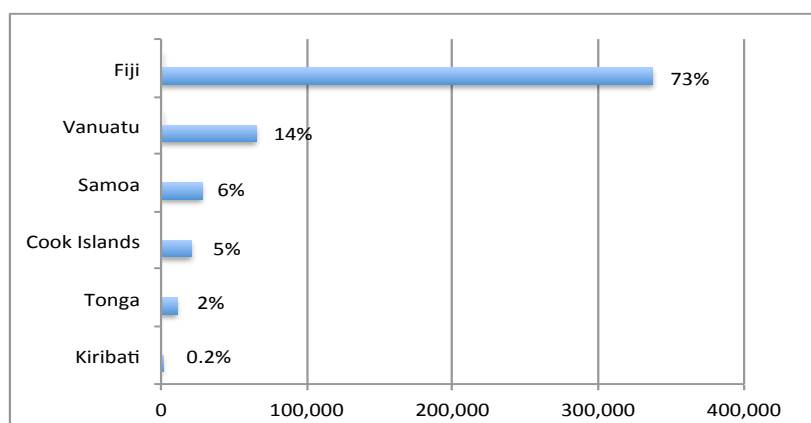
### 2.3 Source Tourism Markets and Arrivals to South Pacific Countries

The visitor arrivals by source market during 2012 are summarised in the charts below, highlighting the main South Pacific destinations for each source market included in this study.

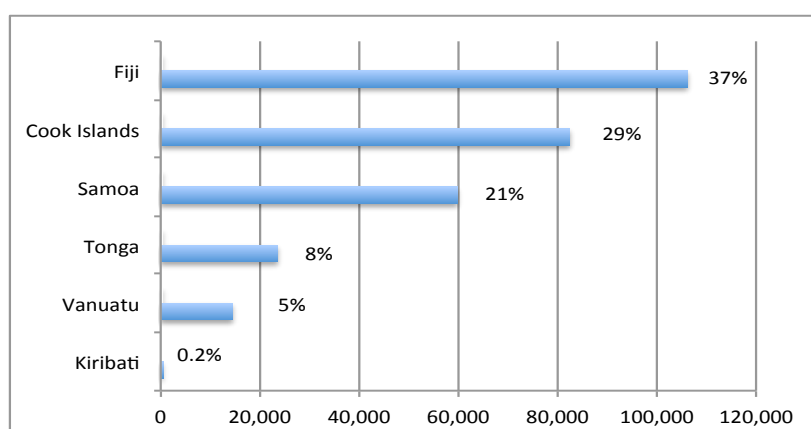
The breakdown of arrivals for the largest South Pacific leisure markets – the Cook Islands, Fiji, Kiribati, Samoa, Tonga and Vanuatu – are also illustrated below.

#### Arrivals from Key Source Markets

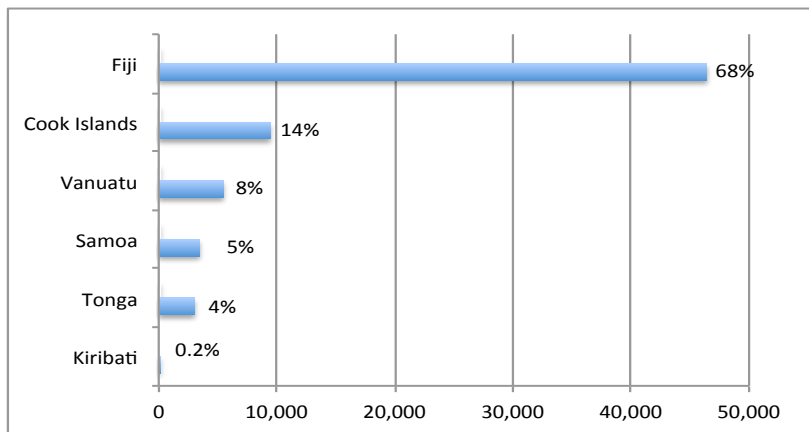
Arrivals from Australia



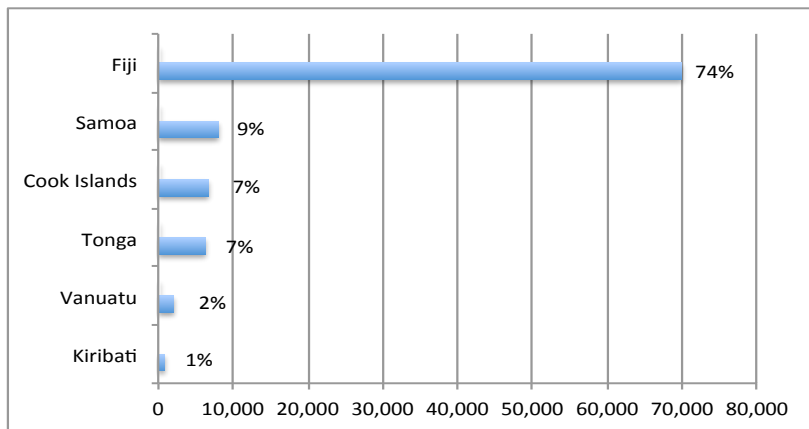
Arrivals from New Zealand



### Arrivals from Europe

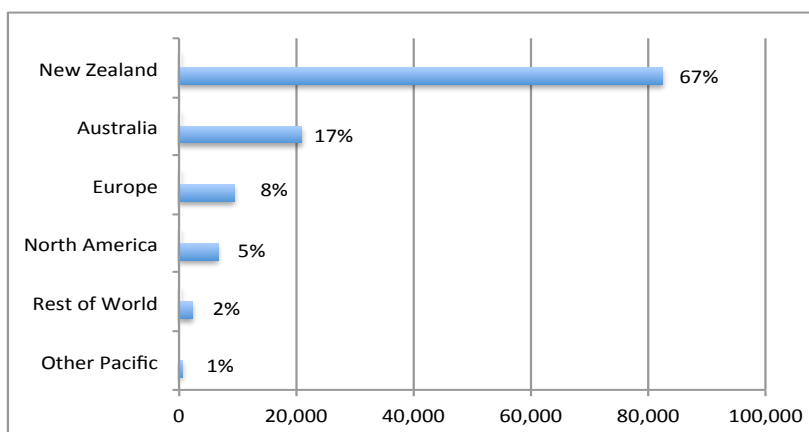


### Arrivals from North America

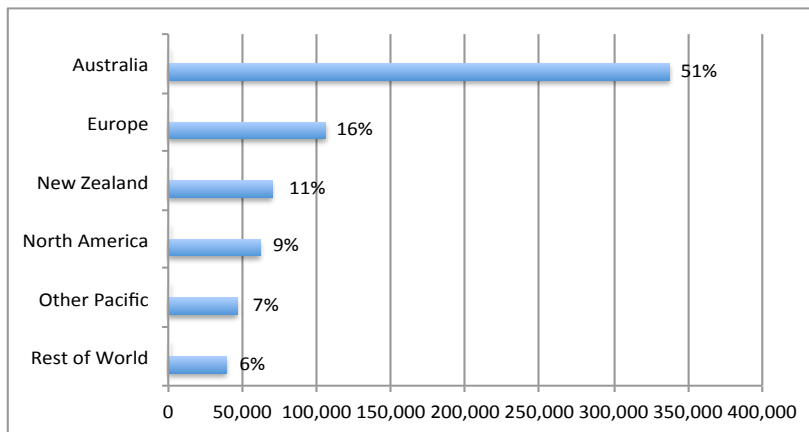


### Arrivals to South Pacific Countries

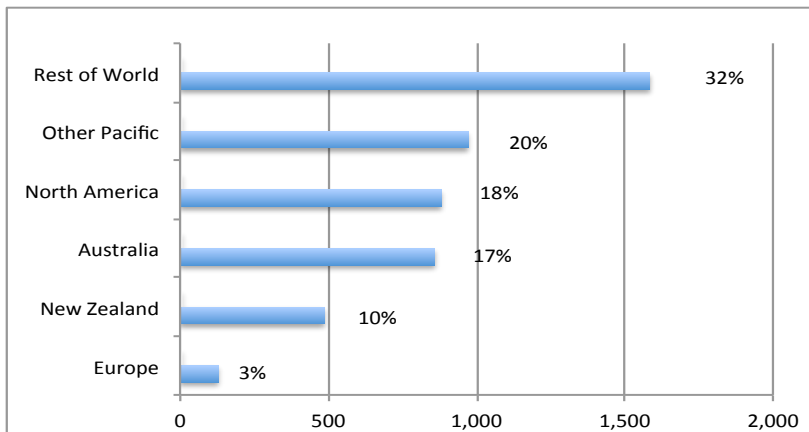
#### Cook Islands



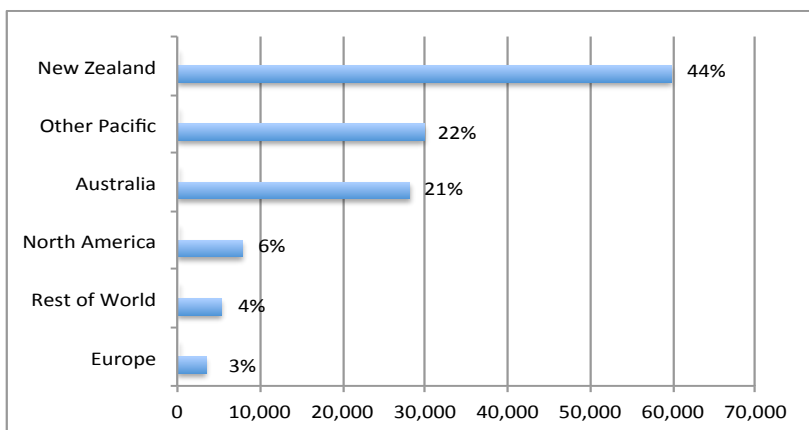
Fiji



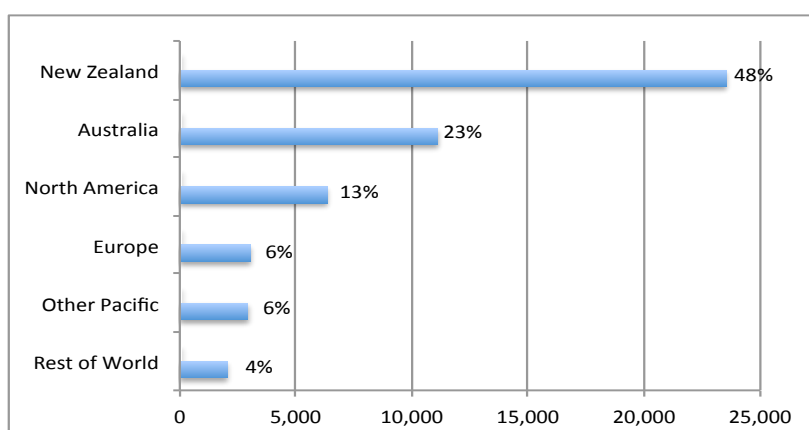
Kiribati



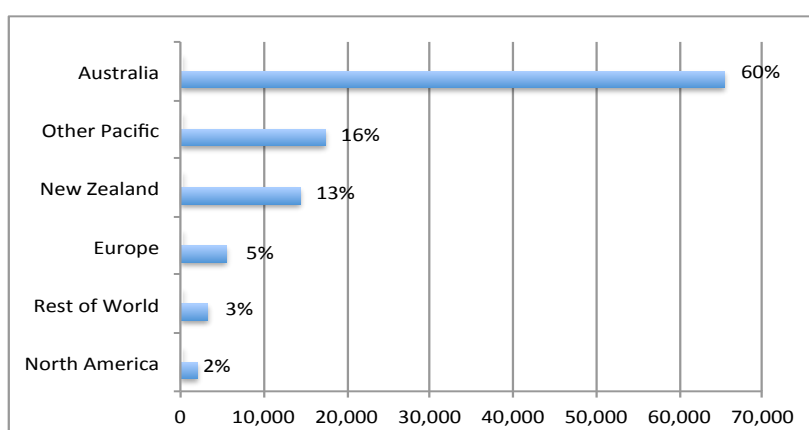
Samoa



### Tonga



### Vanuatu



## 2.4 Summary

- Holidaymakers account for 69% of all visits to the South Pacific, followed by visiting friends and relatives (14%).
- Fiji is the leading destination for international arrivals, particularly from North America (74%) and Australia (73%), followed by Europe (68%).
- After Fiji, tourists from New Zealand and Europe are most inclined to visit the Cook Islands (29% and 14% respectively) while Australians travel to Vanuatu (14%) and North Americans visit Samoa (9%).
- New Zealand tourists dominate the arrivals figures to the Cook Islands (67%), Tonga (48%) and Samoa (44%).
- Australians tend to travel to Vanuatu (60%), Fiji (51%) and Tonga (23%).
- As a destination that is more challenging to reach, Kiribati typically attracts visitors from the rest of the world (32%); just 27% are from Australia and New Zealand and 20% from the rest of the Pacific.

### 3. WHERE DO CULTURAL HERITAGE VISITORS COME FROM?

#### What's In This Section?

- *How big is the market and how much do they spend?*
- *Which markets are most important?*

#### 3.1 Global Market

While the global cultural heritage tourism market is a very significant segment of the tourism market, it should be acknowledged that this is to a large extent focused on icon built heritage: for example the pyramids in Egypt or the Great Wall of China.

The cultural heritage of the South Pacific is built around the people and their way of life. While this is a very important element of cultural heritage tourism it is important to recognise that it is a relatively small niche within the wider cultural heritage segment.

Within the tourism sector, cultural heritage tourism (CH) is known to be the largest segment. In 2009, OECD reported that cultural tourism accounted for almost 360 million trips in 2007, or 40% of global tourism. The segment is, however, dominated by the domestic market and estimates suggest that three quarters of visitors to CH attractions are domestic visitors visiting sites in their own country.

CH tourists are a prized commodity in terms of value as they are high spending, discerning individuals who like to stimulate cultural activity at their chosen destination.

The top source markets for cultural heritage are:

- US
- UK
- Germany
- Japan
- France
- Brazil
- Australia

#### 3.2 Europe

##### United Kingdom

The culture and heritage tourism sector in the UK is significant and a key motivator for inbound visitors. In 2009, statistics showed that roughly one third of international visitors visited a cultural or heritage attraction. Examining these figures more closely, it shows that of the 29.2 million overseas visitors during the year, 7.7 million visited a museum; 6.4 million took in a religious monument and 5.8 million a castle, accounting for 26%, 22% and 19.8% of international visitors respectively. The total value of inbound tourism to the CH market in the UK is estimated to be US\$3.86 billion.



## **Continental Europe**

The CH product throughout Europe is also strong and well developed, and there are many sites and destinations of international importance, which attract huge numbers of key source market visitors, both domestic and international.

### **3.3 North America**

Americans are key cultural and heritage tourists and in 2009 it was estimated that some 118.3 million adults participated in some form of CH tourism over the years, or 78% of the US leisure tourist population. As high spenders, the CH tourists spent an average of US\$994 per trip, compared with US\$611 for all US travellers.

Numbers of inbound CH visitors to the US are also growing, with almost 15.4 million CH tourists recorded in 2010, representing 71.2% of all overseas visitors, an increase of 45% since 2004. European visitors dominate the inbound market at 56%, followed by Asia (19%) and South America (13%).

### **3.4 Australasia**

The Australian culture and heritage market is well established and Australians are one of the key source markets for the sector. However, although Australians and New Zealanders are closest key source market to the South Pacific region, they generally choose to travel to Europe or Asia for CH reasons, driven largely by ease of access and value for money (Asia) and historical connections (Europe).

### **3.5 Asia**

#### **Japan**

The Japanese have a keen interest in historical and cultural factors when selecting overseas travel destinations and are interested in learning about different cultures and languages. 60% of Japanese travellers would include history and culture as the most important factor for selecting an overseas destination.

Lifestyle priorities are to relax, keep fit and healthy and spend time with family and friends. Scenic natural beauty is an important consideration when choosing a destination, as is experiencing history and culture.

Holiday entitlement is the primary reason for travelling; Japanese workers receive 16 days annual leave. However on average, less than half of those days are actually taken and any leave over four consecutive days is considered long.

Holidays are typically taken during the 'Golden Week' of national holidays that falls in late April to early May and during Obon (Summer Holiday) from 12-15 August.

Japanese travellers are eager to acquire new knowledge and to enjoy adventure through overseas travel. They see travel as an opportunity to spread knowledge, and be potential cultural ambassadors. These factors are considered to come from Japanese unique "island nation" characteristic.

## South Korea

The South Koreans however, are less interested in culture and when choosing a holiday destination, the five most important factors for them are (in order of importance):

- A safe and secure destination
- Value for money
- A family friendly destination
- Natural beauty
- Good food and wine

### 3.6 Summary

#### Where do cultural heritage visitors come from?

- 360 million tourism trips annually
- Key markets to the South Pacific: USA, UK and Germany
- Australians and New Zealanders go to Europe and Asia



## 4. WHAT DOES A CULTURAL HERITAGE HOLIDAY INVOLVE?

### What's In This Section?

- *What do cultural tourists do?*
- *Which types of tour operators are used?*
- *Which countries are most popular for cultural heritage?*
- *Do European, American and Australians take cultural holidays?*
- *How long is a cultural heritage holiday and how much does it cost?*
- *What type of accommodation is used?*

### 4.1 A Broad Market with Many Sub-Niches

Cultural heritage tourism is often defined as international travel that is directed towards experiencing the arts, heritage, landscapes, traditions and lifestyles of other regions and destinations.

Cultural heritage tourism is a broad market that is characterised by many sub or niche markets. The activities that can be involved in cultural tourism include:

- Architectural and archaeological treasures
- Arts, sculptures, crafts and galleries
- Botanical gardens
- Castles and palaces
- Culinary activities
- Festivals or events
- Historic or heritage sites, monuments and landmarks
- Museums and exhibitions
- Music and dance activities
- Religious venues, temples and mosques
- Sightseeing

In the South Pacific the key cultural heritage activities are culinary, festivals and events, historic sites, music and dance, religious venues, village tours.

### 4.2 Cultural Heritage Tour Operators to the South Pacific

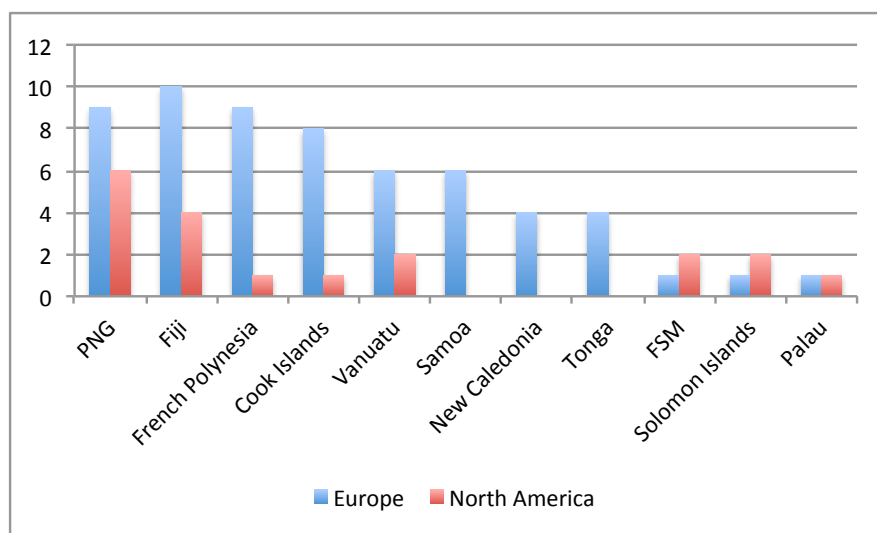
Trips to the South Pacific that are motivated primarily by cultural heritage are a small niche market. Therefore the tour operators that organise specialist cultural heritage tours to the South Pacific are not usually large general tour operators but smaller niche operators who organise tailor made or 'fully independent travel' (FIT) for their clients. They design a tour to meet their client's requirements in terms of activities, types of accommodation, length of trip and budget.

These companies rely heavily on the repeat business of their customers and it is a priority for them to ensure that their clients have a good experience. If a trip is difficult to organise or flights and ground operations are unreliable they are unlikely to recommend the South Pacific to future clients.

### 4.3 Papua New Guinea – Most Popular for Cultural Heritage

Papua New Guinea is the most popular destination for specialist cultural heritage holidays from both Europe and North America<sup>1</sup>.

Figure 4: Destinations for Cultural Heritage Tours from Europe and North America



Source: Tour Operator Interviews, Acorn Tourism

Based on the interviews undertaken with tour operators the other SPTO member countries that were popular for cultural heritage trips from Europe were Fiji, Cook Islands, Vanuatu, Samoa and Tonga. French Polynesia and New Caledonia are also popular from Europe.

### 4.4 European and North American Markets

#### Specialist Cultural Heritage Holidays

Dedicated cultural heritage tours of the South Pacific are a very small niche market from Europe and North America. The tours that do operate tend to be focused on PNG where the culture is considered to be ‘mind blowing’ but where it is considered to be very difficult to organise a tour that meets the service and comfort levels of guests who are often paying in excess of US\$10,000 for a 12-day trip.

A greater number of holidaymakers from Europe and North America will experience the cultural heritage of the South Pacific through holidays that are not primarily motivated by cultural heritage but are more likely to be part of the VFR, romance market or a general leisure holiday.

#### Length of Holiday – Germans Stay Longest

In Europe the Germans take the longest holidays and would expect a cultural heritage trip to the South Pacific to last between 14 to 28 days with an average trip being around 17 days.

<sup>1</sup> It should be noted that the number of interviews with cultural heritage tour operators was very small, particularly in North America.

The French take shorter holidays to the South Pacific lasting between 7 to 20 days and averaging about 14 days.

Cultural holidaymakers from the UK will stay for between 12 and 21 days, with an average of about 14 days for a specialist holiday. However, they are also likely to be on a stopover from a trip to Australia in which case they will stay for 3 to 5 days. Americans, who are closer and have shorter annual holiday entitlements, will stay from 7 to 14 days.

### **Cost of Cultural Heritage Holiday**

A specialist cultural heritage trip to the South Pacific is an expensive holiday. While the cost will be dependent on the length of the trip, the type of accommodation used and airfare it can be estimated that a specialist trip to PNG will cost around US\$12,000.

A shorter trip less specialised trip from North America will start from around US\$4,000.

From Europe a general cultural tour will be in the region of US\$9,000 including flights.

### **Authentic but Comfortable Accommodation Preferred**

Cultural heritage visitors like to feel that they are having an authentic experience in the country they are visiting. However they are usually older and financially well off travellers who can have high expectations of comfort. The challenge for tour operators is therefore to find locally run, authentic type accommodation that also provides the level of comfort expected. This may involve combining types of accommodation during a trip.

The majority of accommodation will be in mid-range hotels and guesthouses rather than luxury resorts, combined with one or two nights in homestays and village accommodation.

### **Visiting Friends and Relatives (VFR)**

Australia is an important destination for Europeans, particularly from the UK, for people who visit their friends and relatives. As well as younger backpackers and gap year travellers, these visitors are often post-family and are travelling to see children and grandchildren. They have time and disposable income and may take stopovers in other countries including the South Pacific.

These VFR travellers are an important clientele for UK-based tour operators who specialise in the South Pacific.

### **Romance Market**

The 'romance market' to the South Pacific includes destination weddings, honeymoons and anniversary holidays. Although visitors taking these holidays are not primarily choosing to take a cultural heritage holiday, they will usually stay in resorts that organise day trips to villages, particularly in Fiji. These visits are generally very well received and can be a highlight of the trip.

The significance of these visitors is that the demographic of the wedding and honeymoon market tends to be younger than the standard cultural heritage visitor, and they may be less well travelled. In the USA these first time visitors may not have travelled abroad before and they may need to obtain a passport for the first time. A positive cultural tour can have a significant impact on a less experienced traveller and can create excellent personal recommendations and repeat visits.

### **General Leisure Holidaymakers**

General leisure holidaymakers from North America are more likely to pre-book one or two day cultural tours during their stay than holidaymakers from Australia or New Zealand.

This may be due to the fact that the South Pacific cultures are relatively unknown to the American market and that additional activities are more in demand from visitors who have travelled further and want to experience more than just a beach holiday.



#### **4.5 Holidays Taken from Australia and New Zealand**

##### **Perception – Beach not Culture**

The South Pacific is not perceived as a cultural heritage destination in the Australian and New Zealand markets.

The general perception of the South Pacific islands is of a relaxing beach holiday destination and the primary motivation for around ninety per cent of holidaymakers to Fiji is to have a relaxing, 'flop and drop' holiday.

Australian and New Zealander visitors who may be interested in taking cultural holidays in other destinations, such as South East Asia or Europe, do not associate this with Fiji and other South Pacific countries and are unlikely to pre-book cultural tours.

The majority of these 'flop and drop' holidaymakers experience the local culture at the hotel, with cultural shows and dancing arranged in resorts.

##### **Length of a Cultural Heritage Tour**

Australians and New Zealanders may include a half or one-day cultural tour during a general leisure holiday but are unlikely to take a longer trip.

##### **General Leisure Holidays**

###### ***Destinations***

Fiji is the most popular destination for Australian and New Zealanders, accounting for 70-80% of holidays booked to the South Pacific. The other popular destinations are Vanuatu, the Cook Islands and Samoa.

The Cook Islands and Samoa have grown in popularity in the Australian market over the last two or three years driven by the availability of direct flights and supported by Tourist Board campaigns that help to drive bookings while the destination is "in market".

They are considered more adventurous destinations, involving an 6-hour flight rather than just three hours to Fiji and may be chosen after holidaymakers have visited Fiji two or three times. There will be little prior knowledge of local cultures in these countries and retailers report high numbers of pre-booked cultural tours to these destinations than they do to Fiji.

###### ***Sightseeing Tours***

Operators report that 5% to 15% of holidaymakers on general leisure trips pre-book a cultural tour and that 90% of cultural tours are day trips that are booked locally in resorts.

Selling pre-booked tours is done more effectively by companies who sell over the phone, and whose agents can up-sell, compared to those who promote online bookings.

Retail companies that take bookings by phone are in a better position to up-sell and encourage potential holidaymakers to pre-book tours compared to companies whose booking are mostly done online.

Of the sightseeing tours that are offered to potential holidaymakers before their trip, around 20% will be based on the local culture. The other tours focus on exploring the islands natural heritage, usually by boat.

Day trips take visitors to villages and local ceremonies or tours of local houses. Tours can last between two and 12 hours and cost between AU\$28 (US\$24) and AU\$350 (US\$330).

Figure 5: Examples of Fiji Cultural ‘Sightseeing Tours’, Australia 2013

Title	Namuamua Inland Tour	Navala Cultural Tour	Nadi Village Tour
<b>Activities</b>	Scenic coach ride, longboat cruise, village ceremony, lunch	Coach ride, village ceremony, school, lunch	Van or boat tour to village
<b>Duration</b>	12 hours	10 hours	n/a
<b>Cost per person</b>	AU\$128	AU\$342	AU\$154

Source: Viva Holidays brochure

Figure 6: Cultural ‘Sightseeing Tours’ offered to Vanuatu, 2013

Title	Vila and Environs Tour	Ekasup Cultural Village Tour
<b>Activities</b>	Tour of Port Vila, places of historic and scenic interest, local markets	Visit to Ekasup Cultural Village, learn to prepare herbs for medicine, food preservation, cooking, making hunting traps, weaving
<b>Duration</b>	2 hours	2.5 hours
<b>Cost per person</b>	AU\$28	AU\$54

Source: Viva Holidays brochure

Figure 7: Cultural ‘Sightseeing Tours’ offered to Cook Islands, 2013

Title	Pa’s Nature Walk	Te Vara Nui Overwater Night Show	Te Vara Nui Village Tour
<b>Activities</b>	Walk to interior of island, insights into history, culture of ancestors; stories of the forefathers	Cultural night show and buffet dinner	Night shows and cultural village tours
<b>Duration</b>	3 hours	2.5 hours	4.5 hours
<b>Cost per person</b>	AU\$74	AU\$75	AU\$92

Source: Viva Holidays brochure

### **Overnight Tours**

Longer tours, that involve an overnight stay, may incorporate visiting a festival and can be combined with soft adventure activities, for example canoe river trips or kayaking to visit the villages. Fiji’s Awesome Experiences and FeeJee Experience, which are aimed at backpackers, lead the market for these tours.

There are one or two slightly longer cultural tours offered by mainstream tour operators, for example one company offers a four-day package to a community project. However this type



of tour sold very few places to the mainstream holiday market, but it did generate interest from groups including 'schoolie' holidays for 17-18 year olds.

### ***Seasonality - Winter Sun***

Australians will travel to the South Pacific throughout the year with the low season being from February to May. Families will mostly travel during school holiday dates.

The peak time for New Zealanders to travel to the South Pacific is in the winter i.e. from May to mid-October. They prefer to stay in New Zealand during the summer and at Christmas.

### ***The 'Wow' Factor***

To attract the high-end market a destination needs to provide the 'wow factor' offering an experience that seemingly no one else has had. These visitors are prepared to spend money but they want to be able to return home and impress their friends with the unique and extraordinary experiences they have had either in terms of adventure, luxury or interaction with local cultures.

The current perception in the Australian and New Zealand markets of the South Pacific countries, particularly Fiji, Vanuatu and the Cook Islands, does not generate this 'wow factor'. An exceptional experience would need to be marketed to attract this high spending audience to explore beyond a luxury resort. For example a bespoke small luxury cruise to the outer islands Flores might appeal to this market.

### ***Cruising***

Small-scale cruising has the potential to offer a way to see more of the cultural side of the South Pacific destinations. Holidaymakers on cruises have their rest and relaxation on board the cruise ship and therefore are more interested to partake in a pre-arranged cultural activity when they arrive at a destination.

The market for cruise holidays is primarily the older age group who are not searching for the 'ultimate experience' in the way the younger soft adventure visitor may be.

#### 4.6 Summary

**Main Activities:**

- Culinary
- Festivals and events
- Historic sites
- Music and dance
- Religious venues and sightseeing
- Village tours

**Type of Tour:**

- Tailor made trips with niche operators or independent travellers

**Top Destination:**

- PNG

**Length of Trip:**

- Germans stay longest, average 16 days
- UK average 14 days; Americans average 7-10 days
- Australians and New Zealanders: one day tours

**Cost:**

- USA from US\$ 4,000 to \$US 12,00 for PNG
- Europe: average US\$ 9,000
- Australian day tour: from US\$ 50

**Accommodation preferred:**

- Authentic but comfortable

## 5. WHO GOES ON CULTURAL HERITAGE HOLIDAYS TO THE SOUTH PACIFIC?

### What's In This Section?

- *Consumer profiles: Visitor demographics, characteristics, and behaviour patterns*

### 5.1 Europe and North America

The market for cultural tourism throughout Europe and North America is well established and a destination's cultural heritage is the most important factor when choosing a holiday destination. After exploring the most well known cultural locations either at home or close by in neighbouring regions, Europeans and Americans are increasingly interested in discovering new destinations, especially if these offer authentic, cultural activities.

For the cultural visitor, cultural tourism is not purely a matter of recreation. Learning about and understanding the country, the place, its history and heritage, the people and their traditions are key to a cultural holiday.

Cultural tourists broadly encompass two types of visitor.

#### **Motivated Cultural Tourist**

Experiencing and learning about the destination's culture is the main reason for travel for this group of discerning tourists. This group of people tend to be highly educated, enjoy a middle to high income and are interested in social and environmental issues. They are often seasoned travellers who undertake considerable research before deciding where to go and like to see and learn as much of the destination as possible. As a consequence, this group is a demanding group of visitors.

#### **Incidental Cultural Tourist**

This substantial group of cultural tourists are attracted by the CH components of a holiday but have another primary reason for a trip which might be adventure, relaxation, safari, beach and so on. They are more likely to participate in cultural activities when they fit easily with their plans and itinerary. For this group, flexibility and convenience is key to attract them to cultural activities.

#### **'Grey Market' Key**

Cultural tourists from Europe and North America can be further segmented by age. The largest segment of cultural tourists is the 55+ age group who are experienced travellers, known to be cash and time rich, and sometimes referred to as the 'grey market'. Quality is important to this group of people which features a considerable number of Motivated Cultural Tourists. Effective marketing to this group is important as membership is on the increase owing to the ageing population.

Younger cultural tourists aged 20-39 are predominantly Incidental Cultural Tourists, largely motivated by a wide range of activities while on holiday, including a cultural element. Around one third of this group prefers a holiday with a cultural emphasis. The 39-54 age group are well represented in both types of cultural tourist and includes the family market.

## **5.2 Australia and New Zealand**

### **'Flop and Drop' not Cultural Heritage**

Although the profile of a cultural heritage holidaymaker from Australia or New Zealand is similar to those from Europe or North America, those holidaymakers are unlikely to be motivated to visit the South Pacific for a cultural holiday.

The market from Australia and New Zealand to the South Pacific is primarily the beach leisure market and comprises of mostly families and couples for weddings and honeymoons. There is little interest in engaging in the cultural heritage of the South Pacific amongst these holidaymakers.

They are looking for 5-7 days of relaxation from busy and often stressful lives at home and prefer the research and booking process to be quite straightforward. Women are the primary decision makers for holidays generally.

New Zealanders show very little interest in taking cultural tours in the South Pacific. It may be that there is a familiarity with Pacific cultures in New Zealand and they are not considered to be of as much interest as they are to holidaymakers from Europe, North American or even Australia.

### **Empty Nesters**

As the Australian population ages there is a growing market of 50 plus year-olds. Sometimes referred to as "cashed up mature travellers"; this generation includes a substantial proportion of self-funded retirees with time, money and are still in good health.

The cultural heritage market internationally is dominated by the over 60s and during the 1990s when there were more specialist operators in Australia who focused on cultural heritage trips to the South Pacific, this age group was their core market. However the volumes are very small and the specialist operators have become generalists catering for the much larger 'flop and drop' beach holiday market.

### **Independent Travellers**

The most likely market for holidaymakers that are interested in exploring more about the cultural and heritage of the islands are the independent travellers including young professionals and the over 50 year-olds. However, for backpackers travelling beyond Fiji, cultural tourism is an expensive option.

### **Backpackers**

Backpackers, whose primary destination is to Fiji, have more time to travel than the general leisure holidaymaker and may explore some of the outer islands and visit local villages. *Awesome Experiences* and *FeeJee Experience* have tapped into this market and offer tours of the outer islands and the mainland. These tours are also offered to the mainstream holidaymakers.

Apart from some backpackers who stop over in Fiji as part of their RTW ticket, the majority of backpackers will arrive in Fiji from Australia or New Zealand and will be European travellers (mostly from the UK and Germany) who are on a working holiday visa to Australia.

### 5.3 Japan

The target Japanese market for cultural and heritage tourism is influenced by women and the older generation.

Women are slightly more interested in history and culture than men.

The over-60s are the most interested in taking a holiday that involves history and culture, followed by the 50 year-olds and then 40 year-olds. The 30 year olds and under are the least interested.

Japanese tourists are often characterised by taking short holidays. However although their holidays are short, they expect to see and experience as much as others. Consequently, intensively planned tours are often the norm. These kinds of tours are designed especially for the Japanese tastes and requirements.

### 5.4 Summary

#### Who goes on cultural heritage holidays?

- Motivated cultural tourists: self-development and learning primary purpose of trip.
- Incidental cultural tourists: take part in cultural heritage activities as one part of trip.
- Largest segment: 55+ year olds; cash and time rich 'grey market'.



## 6. WHAT'S SPECIAL ABOUT CULTURAL HERITAGE IN THE SOUTH PACIFIC?

### What's In This Section?

- *What motivates visitors to chose a cultural heritage holiday in the South Pacific?*

#### 6.1 North and South: So Near, So Far

The USP for South Pacific for holidaymakers from the Northern Hemisphere is the exact opposite to the destinations' appeal to the Australian and New Zealand markets.

In Europe and North America the South Pacific is perceived as 'the ultimate undiscovered tropical getaway'.

Where as for Australians and New Zealanders its USP is that is a good value tropical beach destination that is 'close to home'.

#### 6.2 Europe and North America

##### Welcoming People, Unspoilt Tribal Culture

The people of the South Pacific with their unspoilt cultures and genuine welcome are the strongest motivator for visitors from Europe and North America choosing to visit the South Pacific islands for a cultural holiday.

##### Papua New Guinea

The South Pacific culture that attracts the most visitors is Papua New Guinea. This culture is perceived to be sufficiently unique for tour operators to package specialist cultural heritage tours. Cultural tours to other South Pacific countries will be combined with other activities such as soft adventure.

*"Papua New Guinea: The people, the tribal culture, the unique culture of the island"*

*"The name is very evocative which helps with marketing"*

*"PNG is a once in a lifetime destination"*

*"PNG is mind-blowing with the tribes and people, but otherwise not enough on which to focus a specialised cultural heritage tour"*

European and American Cultural Heritage Tour Operators

### Safety

Personal security is particularly important for the older cultural heritage visitor and the main leisure market of families and older couples. Most of the South Pacific islands, with the exception of Papua New Guinea, are considered to be friendly, safe destinations with little crime.

For the North American market safety is of particular concern and the South Pacific compares well with destinations that are closer to American such as Jamaica and Mexico.

### **World War II and the Dive Market**

Only one of the North American and European cultural tour operators highlighted World War II as a USP for the South Pacific. However for the diving market, the wrecks from the Second World War are an important attraction and provides divers with much greater appreciation of the South Pacific's history than achieved with most other niche visitors, including the cultural heritage market.

## **6.3 Australasia**

### **“Close to Home”**

As with other source markets, it is the people, with their warm welcome and fascinating culture, traditions and festivals that appeal to visitors.

However the Pacific culture is more familiar to the Australians and particularly the New Zealanders than it is to visitors from Europe and America.

The perception of the South Pacific islands therefore, particularly Fiji, Vanuatu and the Cook Islands, is that they are a destination for a beach holiday and consequently, in both Australia and New Zealand there is little interest in exploring the culture. Hence, the key selling point for a South Pacific holiday is that it is a tropical beach holiday that is “close to home” and good value.

Holidaymakers that might be interested in taking a cultural heritage holiday in other destinations are unlikely to perceive Fiji as a place to explore.

*“A USP for cultural heritage? There isn't one – there's a lack of interest in Pacific cultures and the perception that the South Pacific is for relaxation.”*  
Australian Tour Operator

## 6.4 Summary

### Why is a Cultural Heritage Holiday in the South Pacific Special?

#### For Europeans and North Americans the South Pacific's attraction is:

- Welcoming People
- Unspoilt Tribal Culture
- Papua New Guinea
- Unique culture
- Nature
- Security
- The other side of the world

#### For Divers:

- World War II history and wrecks

#### For Australian and New Zealanders:

- "It's not unique or special"
- Close to home
- Good value tropical beach destination

### What are visitors to the South Pacific saying?





## **7. HOW DO CULTURAL HERITAGE VISITORS RESEARCH AND BOOK THEIR HOLIDAYS?**

### **What's In This Section?**

- *How do cultural heritage visitors research, plan and book their holidays?*

### **7.1 European and North American Cultural Holidaymakers**

#### **Aspirational Destination**

The South Pacific is an aspirational destination for holidaymakers in Europe and North America.

The perception of the South Pacific in these markets is of a deserted tropical island cast away, a Robinson Crusoe island, a Gauguinesque paradise.

#### **Internet Research**

Motivated and incidental cultural heritage travellers like to research their destination before travelling and will use the Internet and Google to conduct their research.

#### **Personal Recommendations are Important**

The opinions and experiences of friends and family are an important influence for cultural travellers. As well as opinions of people they know, the sharing travel experiences online are becoming more and more important.

Popular travel websites are TripAdvisor and Lonely Planet and Facebook is increasingly used to share travel experiences with friends and family. These social media sites are particularly valuable for independent travellers.

#### **Specialist Tour Operators**

As a niche product, cultural heritage tourism to the South Pacific is mostly organised and booked through niche operators that specialise in the South Pacific.

These tour operators have a regular clientele base and advise them on destinations and the types of holidays they think will meet their clients' expectations and needs. They need to be very knowledgeable and informed about a destination to be able to sell it effectively. They also need to be confident they can deliver a bespoke tour.

### **7.2 Australasia**

#### **Tiny Market**

The market for cultural heritage tourism to the South Pacific is so small that there are virtually no South Pacific specialists.

### **Independent Travellers**

Visitors who travel independently to the South Pacific tend to be slightly older than the gap year holiday market and will be booking their flights, accommodation online. Other activities will be booked on arrival.

For independent travellers to Fiji, who are looking for a cultural experience and for whom interaction with local people a very important part of their cultural experience, bookings are made in Australia with tour operators who offer flexible tours of Fiji and the outer islands. The two market leaders are Awesome Adventures and FeeJee, Experience.

### **7.3 Summary**

#### **Research**

- Internet research – travel websites
- Personal recommendations
- Tour operator’s advice

#### **Booking**

- Specialist niche tour operators
- Direct with airlines and accommodation



## 8. COMPETING DESTINATIONS

### What's In This Section?

- *Who are the competitor destinations for cultural heritage?*
- *Where is the regional competition for the leisure market?*

#### 8.1 Global Competitors for Cultural Heritage

The key worldwide destinations for cultural tourism are:

- Europe – many countries have a strong cultural offer, such as the UK, France, Italy, Germany, Spain
- Asia – including India, China, Thailand, Malaysia
- South America – Mexico, Argentina, Brazil and Peru

To attract the motivated cultural heritage tourist the South Pacific has to compete against these global destinations. The 80 tour operators interviewed for this study confirmed the competing cultural heritage destinations for the South Pacific are Asia, particularly South East Asia, and Europe.

Within South East Asia, Indonesia is seen as the key competitor by many cultural heritage tour operators.

*“Indonesia has a much wider variety of destinations and cultures with built heritage and World Heritage Sites. South Pacific is a fringe market”.*  
Specialist Asia-Pacific Tour Operator, USA

*“Malaysia and Indonesia are very good value for money, rich in history, have exciting rainforest and great diversity of culture. They also have great access and less expensive flights from Europe. However they are no longer as exotic as the South Pacific for the Scandinavian market.”*  
Swedish Tour Operator

#### 8.2 Regional Competitors for the Leisure Market

In the wider leisure market the South Pacific is competing against:

- Indonesia
- Australia
- Philippines
- Thailand
- Hawaiian Islands
- New Zealand
- Malaysia

Bali, in Indonesia, is a key competitor for the general leisure market from Europe, with holidays being considerably cheaper than Fiji.

For the mainstream market Hawaii has also been a major competitor to the South Pacific during 2013. The prime reason for this is that Hawaii offers not only a beach escape but also a city escape with a strong retail shopping offer, enhanced by a favourable exchange rate with the US dollar.

### 8.3 Japan

In Japan, the South Pacific is competing against the much closer destination of China, with its many World Heritage Sites, Europe particularly the UK, France and Germany.

### 8.4 Summary

**The South Pacific's competitors for cultural heritage holidaymakers are:**

- South East Asia
- Europe

**Indonesia is considered to be the biggest single competitor. Compared to the South Pacific it offers:**

- A greater diversity of cultures
- Rich history and built heritage
- World Heritage Sites
- Good value
- Good access from Europe



## 9. WHAT STOPS MORE PEOPLE TAKING CULTURAL HERITAGE HOLIDAYS IN THE SOUTH PACIFIC?

### What's In This Section?

- *Why aren't there more cultural heritage holidays to the South Pacific?*

### 9.1 Lack of Awareness of the Cultural Product

#### Lack of Consumer Awareness - Perception of the South Pacific as Tropical Relaxation

There is a lack of *consumer awareness* about the different island cultures and therefore little consumer demand to drive the travel trade to create and promote more cultural tours. The Pacific culture is perceived to be the same across the Pacific with no understanding of the differences between different islands with the exception of PNG.

The main barrier to selling more cultural trips to Australians and New Zealanders is the lack of interest in Pacific cultures while on holiday. There is no 'wow factor' that can compete with other destinations.

#### Lack of Trade Knowledge

The lack of knowledge amongst *retail agents* of the distinctive cultural heritage of the different South Pacific countries also means that they continue to promote the South Pacific as a beach destination. The *lack of understanding of the travel trade* can be a considerable barrier to more tours being created for example:

- To be able to work with local businesses, wholesalers need to be confident that local partners can reliably book and deal with payments, with good Internet access and banking facilities.
- Vehicles need to be reliable and suitable insurance in place to ensure clients are protected.
- Local agents need to understand the contractual and pricing requirements of wholesalers and retailers.

### 9.2 A Niche Market

#### Strong Global Competition

Despite the large global market for cultural heritage holidays, the lack of awareness about the individual South Pacific cultures means demand is low and it is difficult to market in the highly competitive European, American and Asian markets where there are many other destinations on offer with stronger product offers, greater accessibility and lower costs.

#### Stagnant visitor numbers to Fiji

The numbers of visitors to Fiji has remained steady for several years, with minor fluctuations. One reason for this is thought to be the lack of new accommodation, with few new hotels having been built in recent years.

### **Market Driven by Volume**

Although there is a potential market that could be interested in specialist cultural trips to the South Pacific islands it is a very small niche market and for the trade wholesalers the volumes are too small to be able to run an effective business, with volumes likely to be in the hundreds rather than thousands of people.

### **No Specialists – Mostly Independent Travellers**

The Australian market has very few specialist niche operators that cater for the 60-year plus market that is interested in the South Pacific culture. It is considered a very small niche market that is not commercial and therefore is not catered for by the travel trade. This segment therefore needs to travel independently.

### **Independent Travellers**

Independent travellers are the most likely segment to want to explore their destination and understand more about the culture and people. However for these travellers need to feel confident in booking their own trips. They need good quality information about local transport and activities as well as accommodation. Small boutique style locally run accommodation is most likely to appeal to these travellers and it will be researched on the Internet.

## **9.3 Accessibility**

Accessibility is a key factor for determining where visitors travel to i.e. how easy it is to book flights, how long it takes to travel to a destination and how much it costs.

### **International Flights Drive the Market**

In the South Pacific member countries there are regular (more than 5 per week<sup>2</sup>) direct international flights on the following routes to:

- Fiji from Sydney, Brisbane, Melbourne, Auckland, Los Angeles
- Cook Islands from Auckland
- Vanuatu from Sydney, Brisbane, Auckland
- Samoa from Brisbane, Auckland
- Papua New Guinea from Brisbane, Cairns and Singapore
- Timor Leste from Darwin

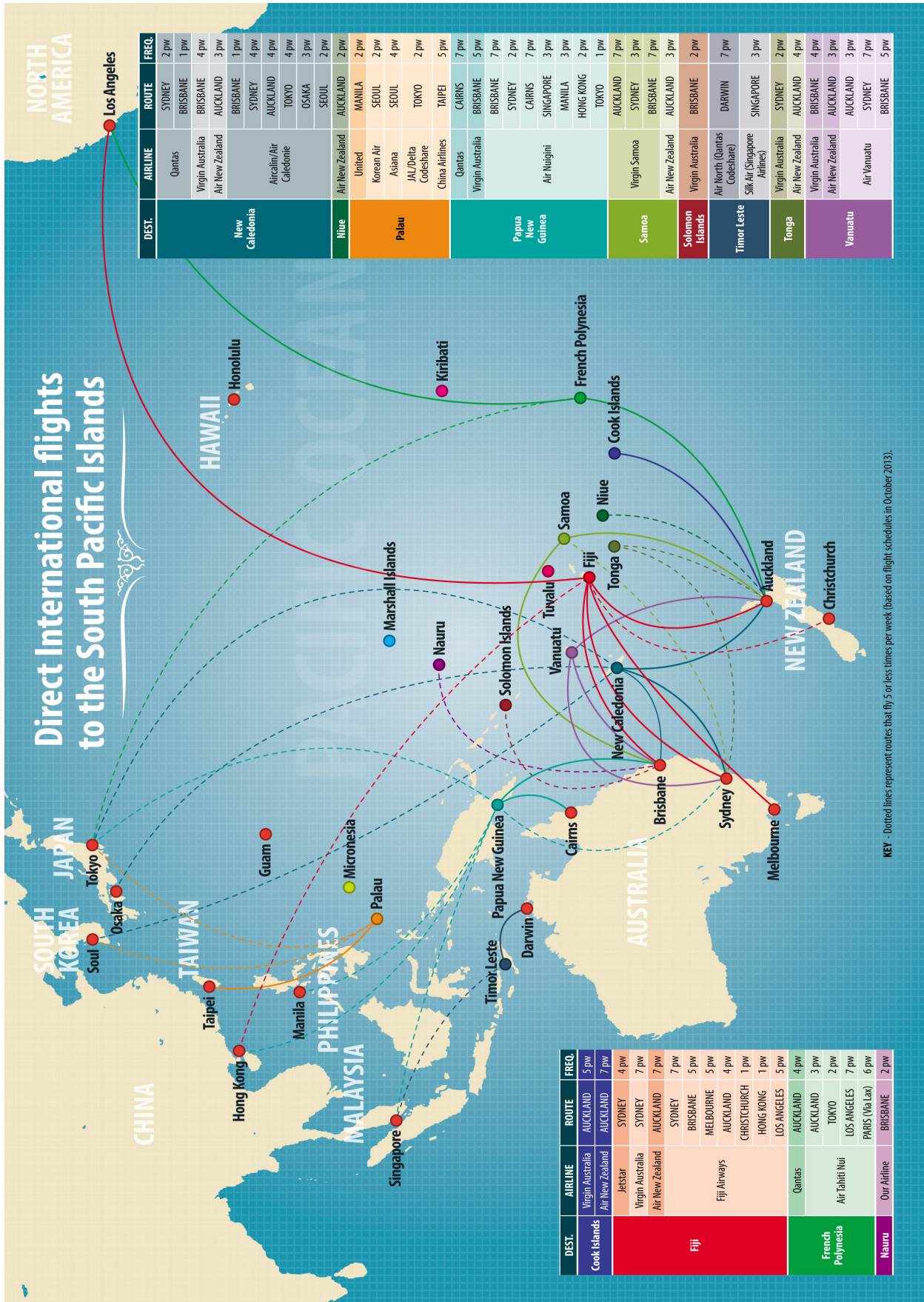
There are also regular flights to French Polynesia (Tahiti) from Los Angeles and New Caledonia from Sydney, Brisbane and Auckland. The map overleaf illustrates the direct international flight routes that were available in October 2013. It highlights which South Pacific destinations have no direct international flight connection. The ease of booking seats is also an important factor and while there is good capacity to Fiji, Cook Islands and Vanuatu, the flights to Samoa have limited seat capacity and are heavily booked by people visiting their friends and relatives.

### **Non-Commercial Air Routes**

Airlines have limited fleets and will only expand routes that are commercial. The high level of VFR passengers, that generates little if any ancillary spend, on routes to destinations such as Samoa and Tonga makes them a low priority for expansion.

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<sup>2</sup> Based on airline schedules in October 2013



### **Lesser Known Islands Appeal - but are Inaccessible**

The less well-known destinations are those that appeal most to cultural heritage visitors. However the limited number of international flights to Micronesia, Kiribati, Marshall Islands, Nauru, Niue, Palau, Solomon Islands, Tonga and Tuvalu makes them expensive and time consuming to reach. Both factors make it difficult both for tour operators to put together interesting but competitive trips, particularly for visitors from North America who have limited holidays and for Europeans who have to incorporate very long international flights.

### **Limited Knowledge of Regional Flight Schedules**

Information about regional flight schedules and air passes within the South Pacific is not widely available or understood by general wholesalers in the main source markets of Europe, North America and Australia and there are often concerns about reliability that mean agents will avoid bookings on these airlines in favour of easier routes.

## **9.4 Product Limitations**

### **Security and Reliability in Papua New Guinea**

PNG is the strongest attraction for specialist cultural heritage holidays from Europe and America. However the security issues associated with the country are off-putting to tour operators and independent travellers, limiting the number of cultural heritage visitors the country could attract.

In addition, tour operators need good reliable partners, which they can struggle to find.

### **Well-Trained Guides Essential**

When travel wholesalers do put together cultural tours their priority is to find good guides, which are very important for their clients, both to bring the visit to life and to ensure that it runs smoothly.

### **Local Accommodation Providers**

For the small local accommodation providers the independent traveller is the best market to target. They can promote themselves on the Internet, which is the key source of information for independent travellers.

However, these suppliers are not usually set up to sell themselves to the trade and the large wholesalers are mostly unable to deal with small local lodges, as they require volume and booking systems that are compatible with their operation.

### **Communications**

There is a lack of communication and booking systems for local activities such as village tours. A network of village tours could be set up so an agent could take bookings for all.



### **Big Brands – Good for Volume**

Big brands can drive volume so for example the Starwood Group (Sheraton) entry into the Samoa market is likely to stimulate an increase in bookings from the general leisure market and give upmarket specialist cultural operators a wider choice of accommodation.

However it may be the expense of the small operators as holidaymakers are buying the hotel as destination rather than the country itself and the unique cultural heritage may become harder to promote.

### **Exchange Rates**

The exchange rate has an impact on the choice of destination. The strength of the AU\$ in recent years has made America, including Hawaii, and Europe attractive for the Australian market.

### **Insurance**

The lack of relevant public liability insurance can be an issue for wholesalers trying to book more interesting activities in the villages. The inbound operators don't always have the relevant insurance. For independent travellers this is question of personal choice but tour wholesalers are not able to offer an activity that isn't properly insured.

## **9.5 Summary**

- Limited air routes to more unusual destinations
- Travel time from Europe and North America
- Cost: airfares and ground costs
- Low consumer and trade awareness of the cultural heritage in the South Pacific outside PNG.
- Lack of interest amongst Australians and New Zealanders
- Competition from other destinations that have much stronger cultural heritage products
- Limited authentic but comfortable accommodation
- Lack of knowledge about reliable local partners

## 10. HOW COULD CULTURAL HERITAGE TOURISM BE IMPROVED?

### What's In This Section?

- *Recommendations for improving the cultural heritage product to meet expectations*

### 10.1 Attracting the Global Market

#### World Heritage Sites

It is widely accepted that the cultural heritage market is set to continue growing over the coming decades. It will be key for tourism providers to develop their tourism product to accommodate their cultural selling points to increase the growth of this sector further.

The World Heritage Sites compiled by the United Nations Educational Scientific and Cultural Organisation (UNESCO) include four in the South Pacific region:

- Bikini Atoll Nuclear Test Site – Ralik Chain, Marshall Islands
- Chief Roi Mata's Domain – Shefa, Vanuatu
- East Rennell – Rennell and Bellona, Solomon Islands
- Phoenix Islands Protected Area – Phoenix Islands, Kiribati

World Heritage Sites are an important attractor for cultural heritage visitors and the Marshall Islands, Vanuatu, Solomon Islands and Kiribati could consider how they can build these sites into their tourism offer.

#### Hands-on Learning and Itineraries

One area of growth in the cultural heritage sector is *hands-on learning of local practices*, for example bone carving and Maori language classes in New Zealand.

Other growth areas include creating *itineraries or routes* to link together creative enterprises and events in regions.

Combining more than one location to mix relaxation with culture captures a wider market. Although holidaymakers want memorable experiences, 80% of them want comfort first and only 20% want to do and experience more.

#### Incidental Cultural Tourists - Package with Soft Adventure

In addition to the visitors whose primary interest is cultural heritage, there are other groups of holidaymakers who are interested in learning and experiencing more about the culture of their destination but who have a different primary motive for visiting the South Pacific. These include visitors wanting soft adventure holidays including divers and backpackers.

Soft adventurers enjoy experiencing the natural environment and partaking in outdoor activities such as hiking, kayaking, riding. Travelling around the South Pacific in this way enables them to travel to less populated areas and come into contact with local people and the local way of life.

Although the primary motivation of divers is to dive and is not for cultural heritage, they are a segment of visitors that will leave their destination with a far greater knowledge of its culture and history than most other holidaymakers. The level of interaction with local people is usually very high compared to other types of holidays; the history and stories behind wreck diving in particular provides a level of insight into local life and history that far exceeds that of other holidaymakers.

Backpackers are also keen to experience the culture of the destination they visit and chose their means of transport, accommodation and activities with this in mind, as well as being concerned about their budget.

## **10.2 Meeting Cultural Tourists Expectations**

### **Focus on Quality**

#### ***Facilities***

The cultural heritage holidaymaker is well educated, well travelled and financially well off. They have high expectations of their holidays while they don't expect luxury on a cultural heritage tour they do look for quality and good value from accommodation, restaurants, activities and the interpretation of the cultural experiences they are having.

#### ***Guides***

Well-trained good quality guides that have language skills, are well organised, reliable and who can bring a culture to life for visitors are an essential element of cultural tour.

These guides will be the facilitators of the holidaymakers' cultural experience. They need to understand and be able to deliver their clients needs and understand 'western' customer service expectations.

## **10.3 Meeting Travel Trade Expectations**

### **Understanding of the travel trade amongst local suppliers**

For tour operators to sell local cultural activities they need to be packaged in a way that fits the needs of the industry.

Better training of local suppliers is needed to improve their understanding of how the travel trade operates. For example:

- Pricing structures and commissions for wholesale and trade
- Booking and payment systems
- Communications and response times
- Contracts
- Child policies
- Insurance

### **Reliable Partners**

As a niche product, cultural heritage tourism to the South Pacific is mostly organised and booked through niche operators. These tour operators mostly organise tailor-made holidays and are dependent on finding reliable local partners to make the ground arrangements. They are good potential partners for local suppliers and will usually find local partners through word of mouth recommendations from other trade partners or at trade fairs.

These tour operators can be cautious about taking on new local partners because their business is highly dependent on repeat custom and they want to ensure their clients have a very good, high quality experience. They need to know that their local partners will deliver the level of quality they require.

### **10.4 Summary**

- Promote World Heritage Sites
- Develop itineraries and hands-on learning
- Package culture with soft adventure
- Understand western customer service expectations
- Focus on quality
- Train good guides
- Ensure local suppliers understand the international travel trade



## 11. MARKETING RECOMMENDATIONS

### What's In This Section?

- *Marketing Recommendations*
- *Key pointers for successful marketing of cultural heritage holidays*

### 11.1 Sell the Experience - Drive Cultural Awareness

#### Tailor Campaigns

Drive consumer awareness of the cultural offer in the different South Pacific countries. Marketing campaigns need to be tailored to the specific market, e.g. Americans have a different level of understanding of South Pacific to New Zealanders.

#### Differentiate

Promotional activities need to differentiate between islands, highlighting what makes each one special and different, rather than selling them all as idyllic beach destinations.

#### Inspire Australians and New Zealanders

There is a strong need to market the South Pacific cultural heritage offer to the New Zealand and Australian markets. There is generally low demand, particularly from New Zealanders, for adding cultural tours to a resort holiday. New Zealanders may feel that they are familiar with the Pacific culture and it is not of sufficient interest to take time out of a seven-day leisure holiday. Australians are more likely to book a one, or occasionally two-day tour, but to drive the market there needs to be much greater consumer awareness of unique cultures of the South Pacific.

### 11.2 Target the Soft Adventure Market

#### Create Active Culture

There is potential to tap into the younger professional market that is interested in doing more during their holiday than lie on the beach. A cultural heritage tour may be of more interest to these holidaymakers if it is combined with soft adventure activities such as hiking, cycling, kayaking to meet villagers or listen to the ancestral stories of local tribesmen.

These visitors are more likely to be more adventurous than the average flop and drop tourist, and want to stay in more authentic accommodation on the lesser known islands, rather than in the main resorts. Previously they may have been backpacking but now have more money and while they still want adventure they are happy to pay for greater comfort. They may book using an agent but will have thoroughly researched on line the locations, accommodation and activities that interest them.

#### Alternative Interests

To reach this small but potentially valuable market it is necessary to understand their other interests, to be able to tap into their other avenues of interest. They may read National Geographic or photography magazines, partake in sports clubs or be active purchasers of outdoor equipment.

## **Engage Social Media**

Traditional advertising in newspapers or magazines is unlikely to engage this market but penetrating them through alternative interests - through the bloggers and brand websites, YouTube channels or Facebook pages that specialise in their other soft adventure interests – are more likely to generate response.

### **11.3 Tap Into the VFR Market To Australia**

Tap into the VFR market from Europe to Australia and New Zealand to encourage these potential cultural heritage visitors to include a trip to the South Pacific. This market consists of older, post-family travellers and younger backpackers.

### **11.4 Trade Activities**

#### **Co-operative Marketing**

Co-operative marketing campaigns between the travel trade (wholesalers and retailer) and the airlines and/or tourist boards remain very important to the marketing and promoting all types of holidays. Good value offers on airfares are a key element of offering a lead promotion to attract holidaymakers.

#### **Co-ordinate Marketing Campaigns to fit with Airline Capacity**

The Tourist Boards should communicate with airlines to establish the best time to run leisure promotions. Tourist boards' marketing activity drives enquiries and there is no point in doing this during a period when the flights are full with VFR travellers. Marketing campaigns should be scheduled to fit in with spare flight capacity.

#### **Familiarisation Trips – Selling from Personal Experience**

Cultural heritage visitors do a lot of pre-trip research and are often more educated than the trade. The importance of being able to sell a destination from a personal perspective is invaluable. A sales agent who can enthuse about a destination from first-hand experience will increase sales. Therefore the value of 'Fam Trips' is very high. Improved cultural product knowledge amongst international retail agents would enable them to upsell cultural tours and not just the beach holiday.

### **11.5 Personal Recommendations**

#### **Exceed Visitor Expectations**

Word of mouth recommendations from friends, family, and peer groups are the most influential form of marketing. It means that every customer needs to go home having had their expectations met, and ideally exceeded, and ready to tell their contemporaries about the amazing holiday they have had.

#### **Trade Recommendations**

For the tour operators and wholesalers to expand into new destinations they need reliable ground operators who can negotiate all elements of the holiday package and provide wholesalers with one point of contact. These are usually found through personal contacts and recommendations. The Tourism Board could facilitate these contacts by providing details of good quality ground operators.

## 11.6 Summary

### **Sell the Experience**

- Drive cultural awareness
- Move away from the tropical beach perception
- Invite visitors to meet the people
- Inspire a sense of discovery about what's available in the South Pacific
- Define the difference and what is special, differentiate between islands
- Create a 'wow' factor for the Australian and New Zealand markets

### **Tailor marketing campaigns to individual territories**

### **Target the Soft Adventure market**

- Create active culture
- Target alternative interests
- Engage with social media

### **Sell from Personal Experience:**

- Support Fam Trips, train international sales agents

### **Trade Activities**

- Co-op marketing with tour operators and airlines
- Co-ordinate campaigns with airline capacity

### **Build Personal Recommendations**

- Exceed customer expectations
- Facilitate trade contacts



## 12. PROMOTIONAL CHANNELS

### What's In This Section?

- *Key methods of distribution*
- *Specialised media for marketing and promotion*
- *Traditional and Electronic; through which consumers can be reached for promotional purposes.*

#### 12.1 Global

##### Publications

There are several travel magazines and newspaper travel supplements on the international market today that attract the affluent, educated audience who are most likely to be interested in identifying the next destination for the CH trip.

Conde Nast Traveller [www.cntraveller.com](http://www.cntraveller.com)

Islands Magazine [www.islands.com](http://www.islands.com)

Lonely Planet Magazine [www.lonelyplanet.com/magazine](http://www.lonelyplanet.com/magazine)

National Geographic Traveler [www.travel.nationalgeographic.com/travel/traveler-magazine/](http://www.travel.nationalgeographic.com/travel/traveler-magazine/)

Travel + Leisure [www.travelandleisure.com](http://www.travelandleisure.com)

Travel 50 & Beyond [www.travel50andbeyond.com](http://www.travel50andbeyond.com)

Wanderlust [www.wanderlust.co.uk](http://www.wanderlust.co.uk)

##### Social Networks

There are a large number of travel-based online social networks providing a clear indication that much planning and decision-making is informed through online discussions with members, friends and contacts. The connections with Facebook are also key and there is some evidence that social networks do spur travel sales.

Facebook [www.facebook.com](http://www.facebook.com)

Gogobot [www.gogobot.com](http://www.gogobot.com)

Gtrot [www.gtrot.com](http://www.gtrot.com)

Trippy [www.trippy.com](http://www.trippy.com)

Tripatini [www.tripatini.com](http://www.tripatini.com)

'The world's smartest travel social network'.

TripColony [www.tripcolony.com](http://www.tripcolony.com)

Travellution [www.travellution.com](http://www.travellution.com)

'The first 'social' social network', Travellution is about realising 'dream vacations', planning, organising and sharing ideas.

WAYN: Where are you now? [www.wayn.com](http://www.wayn.com)

Claims to be 'the world's largest travel and lifestyle social network'. A countdown/up counter records almost 22 million members signed up in August 2013.



## **Global Organisations**

International Council on Monuments and Sites [www.icomos.org/en](http://www.icomos.org/en)

UNESCO World Heritage Centre [www.whc.unesco.org](http://www.whc.unesco.org)

## **12.2 Europe**

### **United Kingdom**

#### ***Newspaper Travel Supplements***

The broadsheet newspapers in the UK have dedicated travel sections which feature a myriad of articles and features on worldwide destinations, 'must see' places to visit, around which the focus is often cultural.

Guardian (Observer on Sunday) [www.guardian.com/travel](http://www.guardian.com/travel)

Sunday Times [www.thesundaytimes.co.uk/sto/travel](http://www.thesundaytimes.co.uk/sto/travel)

Telegraph Travel Section [www.telegraph.co.uk/travel](http://www.telegraph.co.uk/travel)

Times Travel Section [www.thetimes.co.uk/tto/travel](http://www.thetimes.co.uk/tto/travel)

#### ***Trade and Consumer Shows***

Adventure Travel Show

25-26 January 2014, London

[www.adventureshow.co.uk](http://www.adventureshow.co.uk)

Conde Nast Traveller Luxury Travel Fair

7-10 November 2013, London

[www.luxurytravelfair.com](http://www.luxurytravelfair.com)

Destinations Holiday and Travel Show

23-26 January 2014, Manchester

6-9 February 2014, London

[www.destinationsshow.com](http://www.destinationsshow.com)

Telegraph Outdoor Adventure and Travel Show

13-16 February 2014, London

[www.telegraphoutdoorshow.co.uk](http://www.telegraphoutdoorshow.co.uk)

The 50+ Travel Show

7-9 November 2013, Glasgow

6-7 December 2013, Birmingham

[www.50plusshow.com](http://www.50plusshow.com)

World Travel Market

4-7 November 2012, London

[www.wtmlondon.com](http://www.wtmlondon.com)

### **Online TV Channels**

The Travel Channel presents a unique perspective on the travel experience featuring luxury getaways, lifestyle and culture, travel passions and other diverse sectors.

[www.travelchannel.co.uk](http://www.travelchannel.co.uk)

### **Continental Europe**

#### **Newspaper Travel Supplements**

Frankfurter Allgemeine Zeitung (FAZ) [www.faz.net](http://www.faz.net)

Corriere della Sera [www.viaggi.corriere.it](http://www.viaggi.corriere.it)

Le Figaro [www.voyage.lefigaro.fr](http://www.voyage.lefigaro.fr)

#### **Trade and Consumer Shows**

International Luxury Travel Market  
2-5 December 2013, Cannes, France

[www.iftm.fr](http://www.iftm.fr)

ITB

5-9 March 2014, Berlin, Germany

[www.itb-berlin.de](http://www.itb-berlin.de)

### **12.3 North America (USA, Canada)**

#### **Newspaper Travel Supplements:**

There are regular travel articles and travel sections in US mainstream media including the *Wall Street Journal*, the *New York Times*, the *Washington Post* and *The Huffington Post's* travel section, *Huffpost Travel*.

[www.online.wsj.com/public/page/news-travel-vacation.html](http://www.online.wsj.com/public/page/news-travel-vacation.html)

[www.nytimes.com/pages/travel/index.html](http://www.nytimes.com/pages/travel/index.html)

[www.washingtonpost.com/lifestyle/travel](http://www.washingtonpost.com/lifestyle/travel)

[www.huffingtonpost.com/travel](http://www.huffingtonpost.com/travel)

#### **Social Media**

Trip Advisor is used extensively in the United States and the number and quality of the recommendations for a resort is a key to influencing peoples' choice of destination.

#### **Traditional Media**

The most influential magazines for cultural heritage holidays for the more affluent traveller are:

Conde Nast Traveler [www.cntraveler.com](http://www.cntraveler.com)

The website has destination sections on the Cook Islands, French Polynesia and Fiji.

National Geographic Traveler [www.travel.nationalgeographic.com](http://www.travel.nationalgeographic.com)

An online destination guide includes: Fiji, Kiribati, Marshall Islands, Micronesia, Nauru, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu.

Travel + Leisure [www.travelandleisure.com](http://www.travelandleisure.com)

Online travel guides for the Cook Islands, Fiji, French Polynesia, Micronesia, Solomon Islands, Tonga.

## **12.4 Australasia**

### **Australia**

#### ***Print Media***

The Australian newspaper has travel supplements that heavily promote mainstream package holidays to Fiji and Vanuatu.

[www.theaustralian.com.au/travel](http://www.theaustralian.com.au/travel)

More unusual destinations or companies with smaller budgets cannot effectively compete in these supplements and focus on digital marketing on the Internet or through email newsletter campaigns to their database of existing and potential clients.

Some larger brands are still using traditional media and print advertising, however there is a move to digital marketing campaigns across the board. Search Engine Optimisation and Google Display campaigns are very targeted.

#### ***Consumer Travel Shows***

The Holiday & Travel Show – Brisbane, Sydney, Melbourne

Australia's leading free travel expo to be held in three major cities in February and March 2014.

[www.travelxpo.com.au](http://www.travelxpo.com.au)

Adventure Travel Expo – Auckland, Brisbane, Sydney, Melbourne

Free adventure travel expos held annually in February and March.

[www.myadventureexpo.com](http://www.myadventureexpo.com)

The cost of exhibiting at these shows means they are probably only suitable for the larger operators.

## **12.5 Asia**

### **Japan**

There are a number of regional tourist boards which are active in Japan.

Nouvelle Caledonie Tourisme Point Sud [www.newcaledonia.jp/](http://www.newcaledonia.jp/)

Tahiti Tourism Japan [www.tahiti-tourisme.jp/](http://www.tahiti-tourisme.jp/)

Tourism Fiji [www.bulafiji-jp.com](http://www.bulafiji-jp.com)

PNG Tourism Japan [www.pngtourism.jp](http://www.pngtourism.jp)

### ***Social Networks***

There are several social network sites that focus on sharing travel information in Japan. Gaining tourism information from social network sites is getting to be common for most Japanese.

Trip Advisor [www.tripadvisor.jp](http://www.tripadvisor.jp)

For Travel [www.4travel.jp](http://www.4travel.jp)

Tabisuke [www.tabisuke.arukikata.co.jp](http://www.tabisuke.arukikata.co.jp)

### ***Trade and Consumer Shows***

International Luxury Travel Market Asia

2-5 June 2014, Shanghai, China

[www.iltm.net/asia](http://www.iltm.net/asia)



## 13. OUTBOUND OPERATORS

### What's In This Section?

- *A list of key outbound operators that currently specialise in the cultural heritage niche market.*
- *Cultural and historic tours often feature as one part of a tour operator's portfolio, and currently, the South Pacific region has a very low profile with most operators. The list below provides is a selection of prominent CH operators, plus some more specialist cultural operators.*

### 13.1 Global

Flight Centre [www.flightcentre.com](http://www.flightcentre.com)

Provider of cheap flights and Round the World tickets. Offices in Australia, New Zealand, Canada, United States, South Africa, United Kingdom, Hong Kong, United Arab Emirates, Singapore, China, India.

STA Travel [www.statravel.com](http://www.statravel.com)

Global company with international offices in the US, UK, Germany, Sweden and France, STA provides cheap flights, accommodation and volunteer trips.

### 13.2 Europe

#### France

Adeo Voyages [www.adeo-voyages.com](http://www.adeo-voyages.com)

Travel experts specialising in adventure and discovery. Small group tours worldwide including Vanuatu and New Caledonia.

Continents Insolites [www.continents-insolites.com](http://www.continents-insolites.com)

Worldwide tour operator; French Polynesia and Vanuatu included in portfolio.

Huwans Clubaventure [www.huwans-clubaventure.fr](http://www.huwans-clubaventure.fr)

Specialises in adventure travel and destinations include Vanuatu, New Caledonia and French Polynesia.

Intermedes [www.intermedes.com](http://www.intermedes.com)

Cultural specialists – tours often accompanied by lectures; several destinations including PNG.

Kuoni [www.kuoni.fr](http://www.kuoni.fr)

French branch of the luxury travel company; includes four cruises around the French Polynesian islands.

Nomade Aventure [www.nomade-aventure.fr](http://www.nomade-aventure.fr)

Adventure specialists; cultural tours in PNG and New Caledonia.

Tamera [www.tamera.fr](http://www.tamera.fr)

Adventure holidays worldwide.

Voyageur du Monde [www.voyageursdumonde.fr](http://www.voyageursdumonde.fr)

Specialists in luxury, tailor made holidays, including French Polynesia.

## Germany

Germany has a wide range of companies offering adventure and cultural tours to the South Pacific including:

BWT Travel Office [www.suedsee.com](http://www.suedsee.com)

Colibri Travel [www.colibri-travel.de](http://www.colibri-travel.de)

Diamir [www.diamir.de](http://www.diamir.de)

Djoser [www.djoser.de](http://www.djoser.de)

Dorothees flug-service [www.suedsee-traumurlaub.de](http://www.suedsee-traumurlaub.de)

Eberhardt [www.eberhardt-travel.de](http://www.eberhardt-travel.de)

Explorer [www.explorer.de](http://www.explorer.de)

Gebeco [www.gebeco.de](http://www.gebeco.de)

Hauser Exkursionen Int [www.hauser-exkursionen.de](http://www.hauser-exkursionen.de)

Ikarus Tours GmbH [www.ikarus.com](http://www.ikarus.com)

Pacific Travel House [www.pacific-travel-house.com](http://www.pacific-travel-house.com)

Polynesia Tours [www.polynesia-tours.de](http://www.polynesia-tours.de)

Tripido [www.tripido.de](http://www.tripido.de)

Wikinger Reisen [www.wikinger-resein.de](http://www.wikinger-resein.de)

Windrose Fernreisen Touristk [www.windrose.de](http://www.windrose.de)

## Italy

Australia World [www.australiaworld.it](http://www.australiaworld.it)

Specialises in Australia and Polynesia. Tours to the South Pacific are organised from Australia.

Cividin [www.cividin.com](http://www.cividin.com)

Travel company specialising in Australia, New Zealand and the South Pacific.

Go Australia [www.goaustralia.it](http://www.goaustralia.it)

Leading Italian operator to Oceania.

Go Go Travel [www.gogotravel.it](http://www.gogotravel.it)

Tour operator originally specialised in Polynesia. Other destinations have been added to its portfolio, and diving in Fiji and Cook Islands are included.

Pan Pacific Tours [www.panpacific.it](http://www.panpacific.it)

Specialises in Australia, New Zealand and the South Pacific; offers honeymoons and diving.

Other Italian tour operators include:

Club Paridiso [www.clubparidiso.it](http://www.clubparidiso.it)

Promo World [www.promo-world.it](http://www.promo-world.it)

Turismo [www.turismo.it](http://www.turismo.it)

Viaggi dell Elefante [www.viaggidellelefanti.it](http://www.viaggidellelefanti.it)

## Sweden

Albatros Travel [www.albatros-travel.se](http://www.albatros-travel.se)

Offers a range of cultural and nature tours worldwide; South Pacific Islands included within destinations portfolio, including Tonga, Tuvalu and Vanuatu.

Allresor [www.allresor.se](http://www.allresor.se)

Offers cultural and adventure holidays worldwide, including PNG and Tonga.

Fiji Resor [www.fijioresor.se](http://www.fijioresor.se)

Specialist travel company to Fiji and other South Pacific islands, offering tours, honeymoons and diving excursions.

Las & Res [www.lasochres.se](http://www.lasochres.se)

Small group, longer trips to experience local cultures, including PNG.

South Sea Travel [www.soderhavsresor.se](http://www.soderhavsresor.se)

South Pacific specialists offering several cultural tours to Cook Island and Fiji, and diving trips.

TEMA [www.temaresor.se](http://www.temaresor.se)

Operator provides cultural tours worldwide including Fiji.

## United Kingdom

Abercrombie & Kent [www.abercrombiekent.co.uk](http://www.abercrombiekent.co.uk)

One of the world's best-known luxury travel companies covering 26 countries in seven continents. Cultural and heritage feature highly in travel itineraries and holidays range from tailor-made, small group adventures and private villa holidays.

All Ways Tailor Made [www.awtm.com](http://www.awtm.com)

Specialist operator creating bespoke holidays to New Zealand, Australia and the South Pacific – Cook Islands, Fiji, New Caledonia, Samoa, Tahiti, Tonga and Vanuatu.

Audley Travel [www.audleytravel.co.uk](http://www.audleytravel.co.uk)

Upmarket operator offering tailor made holidays worldwide, and includes local cultural experiences in Cook Islands, Samoa and Fiji.

Cox & Kings [www.coxandkings.com](http://www.coxandkings.com)

Luxury small group tours and tailor made tours, including cruises, to PNG and cultural tours of the islands.

Exodus [www.exodus.co.uk](http://www.exodus.co.uk)

The 'original' activity and adventure holiday company and includes PNG's Kokoda Track in its itinerary portfolio along with other war sites.

Explore [www.explore.co.uk](http://www.explore.co.uk)

Cultural and adventure travel experts to worldwide destinations including PNG.

Intrepid Travel [www.intrepidtravel.com](http://www.intrepidtravel.com)

Australian-owned company offering cultural trips to PNG's Kokoda Trail.

Kuoni [www.kuoni.co.uk](http://www.kuoni.co.uk)

Luxury tour operator providing tours worldwide, including Fiji and French Polynesia. Honeymoon packages are an important segment; Hawaii is the only Pacific destination offered.

Original Travel [www.originaltravel.co.uk](http://www.originaltravel.co.uk)

Luxury travel company specializing in honeymoons, cultural experiences and diving. Includes Fiji, French Polynesia and PNG in its destination portfolio.

Peregrine Adventures [www.peregrineadventures.com](http://www.peregrineadventures.com)

Australian-owned Peregrine specialises in adventure tours worldwide, including the Kokoda Trail in PNG.

Responsible Travel [www.responsibletravel.com](http://www.responsibletravel.com)

Agent website for a wide range of tour operators that provide holidays which conform to responsible and ethical travel. South Pacific destinations include Cook Islands, Fiji, Micronesia, Samoa, Solomon Islands, Tonga and Vanuatu.

Travelsphere [www.travelsphere.co.uk](http://www.travelsphere.co.uk)

Offers a range of destinations including the Cook Islands and Fiji; cultural holidays are generally included with the touring holidays segment.

Trailfinders [www.trailfinders.com](http://www.trailfinders.com)

As well as providing flights and accommodation around the world, Trailfinders offers bespoke touring and luxury holidays.

Transpacific Holidays

[www.transpacific holidays.co.uk](http://www.transpacific holidays.co.uk)

Niche operator travelling to the South Pacific, including Tuvalu and Kiribati.

Turquoise [www.turquoise holidays.co.uk](http://www.turquoise holidays.co.uk)

Specialises in holidays to the South Pacific, particularly the honeymoon market.

World Youth Adventures [www.worldyouthadventures.com](http://www.worldyouthadventures.com)

WYA has specialised in overseas school group adventures for 20 years, offering a range of cultural and adventure tours. One adventure includes the Kokoda Track in PNG.

### **13.3 North America**

North America is home to a huge number of tour operators which cater for the cultural market and tours are generally included within portfolios of 'experiences'. Some are discussed below; others are listed for reference.

Adventurecenter [www.adventurecenter.com](http://www.adventurecenter.com)

Part of the Peak Adventure Group; trek to PNG's Kokoda Trail.

Asia Transpacific [www.asiatranspacific.com](http://www.asiatranspacific.com)

Small group travel with some focus on the South Pacific – PNG, Micronesia and Palau.

Bestway Tours and Safaris (Canada) [www.bestway.com](http://www.bestway.com)

Small group cultural tours. Timor Leste only.



Elder Treks [www.eldertreks.com](http://www.eldertreks.com)

Small group exotic adventures for the 50+ to destinations including PNG and French Polynesia.

Journeys International [www.journeys.travel](http://www.journeys.travel)

Cultural travel agent, committed to eco travel and ecotourism.

Liberty Travel [www.libertytravel.com](http://www.libertytravel.com)

Large travel agency promoting all types of holidays worldwide; includes cruises to the South Pacific and resort packages.

National Geographic Expeditions and Adventures

[www.nationalgeographicexpeditions.com](http://www.nationalgeographicexpeditions.com)

Adventure trips worldwide and generally accompanied by an expert; promote a number of trips to the South Pacific.

Responsible Vacation [www.responsiblevacation.com](http://www.responsiblevacation.com)

Sister organisation to UK's Responsible Travel, the company is an agent website for a wide range tour operators that provide holidays which confirm to responsible and ethical travel. South Pacific destinations include Cook Islands, Fiji, Micronesia, Samoa, Solomon Islands, Tonga and Vanuatu.

TravelWizard [www.travelwizard.com](http://www.travelwizard.com)

Luxury travel company merged with Azumano Travel American Express in early 2013, and provide a wide range of luxury packages throughout the South Pacific.

Zicasso [www.zicasso.com](http://www.zicasso.com)

Free travel service connecting travellers, looking for a luxury travel experience, with the industry's top 10% travel specialists.

Other relevant travel companies in North America include:

Amazing Adventures Travel [www.amazingadventures.net](http://www.amazingadventures.net)

Expedition Trips [www.expeditiontrips.com](http://www.expeditiontrips.com)

Journey Pacific [www.journeypacific.com](http://www.journeypacific.com)

Lindblad Expeditions [www.expeditions.com](http://www.expeditions.com)

Natural Habitat Adventures [www.nathabb.com](http://www.nathabb.com)

Rascals in Paradise [www.rascalsinparadise.com](http://www.rascalsinparadise.com)

Seacology [www.seacology.org](http://www.seacology.org)

Symbiosis USA [www.symbiosis-travel.com](http://www.symbiosis-travel.com)

Tahiti Discount Travel [www.tahiti-discounttravel.com](http://www.tahiti-discounttravel.com)

Tahiti Travel [www.tahiti-explorer.com](http://www.tahiti-explorer.com)

Travel Arrangements in South Pacific Inc

[www.southpacificreservations.com](http://www.southpacificreservations.com)

Urban Adventures [www.urbanadventures.com](http://www.urbanadventures.com)

Willett Travel [www.willettravel.com](http://www.willettravel.com)

Zegrahm [www.zegrahm.com](http://www.zegrahm.com)

### 13.4 Australasia

Australian tour operators' products differ from tour operators in other parts of the world in that many will sell day tours in South Pacific destinations which are booked by visitors when they arrive in Australia.

Adventure World

[www.adventureworld.com.au](http://www.adventureworld.com.au)

Independent wholesale organisation that sells to the retail trade in addition to direct to the public. Offers tours and accommodation through the South Pacific with some emphasis on the culture and people of the region.

ATS Pacific [www.atspacific.co.nz](http://www.atspacific.co.nz)

Inbound travel management company dealing with Australia, New Zealand and Fiji, organizing travel for more than 100,000 people year, including cultural tours and excursions.

Concierge Traveller [www.conciergetraveller.com.au](http://www.conciergetraveller.com.au)

Boutique agency specialising in luxury holidays, focusing on indulgent, escapist product. Destinations include Tonga and Samoa.

Creative Holidays

[www.creativeholidays.com](http://www.creativeholidays.com)

Promote package holidays and culture day tours in several destinations including Vanuatu.

Edventure Tours [www.edventuretours.co.nz](http://www.edventuretours.co.nz)

Specialist in cultures tours for schools.

Harvey World Travel [www.harveyworld.com.au](http://www.harveyworld.com.au)

Retail travel brand with offices throughout Australia; agent for other travel brands selling tours throughout the South Pacific e.g. Go Holidays [www.goholidays.co.nz](http://www.goholidays.co.nz)

Hideaway Holidays [www.hideawayholidays.com.au](http://www.hideawayholidays.com.au)

South Pacific specialists, particularly for weddings and honeymoons. Offers a range of Pacific Air Passes such as domestic flights in the Cook Islands; Micronesia Air Pass; and Tahiti Air Pass.

Infinity Holidays [www.infinityholidays.com.au](http://www.infinityholidays.com.au)

Wholesale division of Flight Centre Travel Company. Promotes mainstream product to capture high volume; main South Pacific destination is Fiji.

Jetset Travel World Group [www.jtg.co.nz](http://www.jtg.co.nz)

Large, global organisation owning many brands including United Travel, Harvey World Travel, Go Holidays, ATS Pacific and more. Resort holidays are key to business but cultural offer is available in the South Pacific.

Mad Travel Shop (Nomads) [www.madtravelshop.com](http://www.madtravelshop.com)

Although aimed at the backpacker market, Nomads sells the FeeJee Experience passes and other cultural tours.

Pinpoint Travel Group: Rosie Holidays and Freestyle Holidays  
[www.rosieholidays.com.au](http://www.rosieholidays.com.au) and [www.freestyle.com.au](http://www.freestyle.com.au) Rosie Holidays is based in Nadi and specialises in Fiji but sold in Australia through Pinpoint Travel. Freestyle offers Cook Islands, New Caledonia, Samoa, Tahiti and Vanuatu

Qantas Holidays and Viva Holidays [www.vivaholidays.com.au](http://www.vivaholidays.com.au)  
Part of the JTG group, offers tailor made tours to a range of destinations including the South Pacific. Cultural tours in the form of day excursions e.g. Cook Islands and Vanuatu.

South Pacific Travellers  
[www.southpacifictravellers.co.nz](http://www.southpacifictravellers.co.nz)

Virgin Australia Holidays [www.virginaustralia.com](http://www.virginaustralia.com)  
Customers can book a range of tours within the Virgin package which include culture and history.

World Travellers [www.worldtravellers.co.nz](http://www.worldtravellers.co.nz)  
Promote 'experience-based' travel.

### **13.5 Asia**

There are few Japanese tour operators which specialise in promoting cultural heritage tourism South Pacific. Most tour operators sell general holidays and offer cultural heritage tours as an add-on.

PALM tour centre [www.palmtour.net/optourlists/topoptourSouthPacific](http://www.palmtour.net/optourlists/topoptourSouthPacific) Operator organises tours for cross-cultural experience and homestays in the South Pacific.

Eurasia Travel Co [www.eurasia.co.jp](http://www.eurasia.co.jp)  
Promotes cultural heritage and natural heritage tours within the South Pacific regions.

South Pacific Tour [www.sptjpn.com](http://www.sptjpn.com)  
Offers a range of cultural and heritage tours.

PNG Japan [www.png-japan.co.jp](http://www.png-japan.co.jp)  
The operator focuses its business solely on travel within Papua New Guinea. It provides a wide variety of cultural heritage and natural heritage tours.

Global Net NZ [www.fly-cookislands.com](http://www.fly-cookislands.com)  
Specialising in the Cook Islands, the company provides a wide variety of cultural heritage and natural heritage tours.

Condor Travel Service Inc. [www.mambo-tour.co.jp](http://www.mambo-tour.co.jp)  
Company specialises in Tahiti, Fiji, New Caledonia and Maldives, promoting several cultural heritage and natural heritage tours.

Purpose Japan [www.purposejapan.com](http://www.purposejapan.com)  
Promotes a number of tours to New Caledonia including sports tourism and foreign language learning tour.

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