Pacific Trade Invest

PACIFIC TOURISM ORGANISATION

PACIFIC ISLANDS EXPORT SURVEY

2026

Tourism Industry Spotlight



French Polynesia

PACIFIC ISLANDS EXPORT SURVEY 2026

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COMPREHENSIVE

1. FULL REPORT
2. HIGHLIGHTS REPORT

SPOTLIGHTS

3. FIJI (country)
4. VANUATU (country)
5. TOURISM (sector)
6. AGRICULTURE (sector)
7. MANUFACTURING (sector)

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INTRODUCTION

While tourism is often viewed through its contribution to visitor arrivals, it is also one of the Pacific's largest service exports.

This report explores the sector from that perspective, providing insights into international market access, business performance, growth opportunities and the challenges facing tourism operators across the region.

Developed by Pacific Trade Invest (PTI) in partnership with the Pacific Tourism Organisation (SPTO), this Tourism Industry Spotlight draws on the experiences of 121 tourism business leaders and decision-makers from across the Pacific.

Through its network across key international markets, PTI helps Pacific businesses connect with buyers, investors and industry partners, creating opportunities that support export growth, investment attraction and increased visibility for Pacific tourism offerings.

By providing the findings in this report our objective is to help inform decisions that strengthen the competitiveness and resilience of the sector.

Tim Martin
Trade Commissioner
PTI Australia

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FOREWORD

Tourism is one of the Pacific's most important export industries, creating employment, generating foreign exchange earnings, supporting local businesses, and showcasing the unique cultures, environments, and experiences that define our Blue Pacific region.

As the global tourism landscape continues to evolve amid changing economic conditions, shifting consumer preferences, rising operational costs, climate-related challenges, and increasing competition for international visitors, access to timely and reliable industry data has never been more important. Strong evidence enables governments, tourism organisations, development partners, and private sector operators to make informed decisions that support sustainable growth and long-term resilience.

The Pacific Islands Export Survey 2026 provides a valuable contribution to this evidence base. Conducted by Pacific Trade Invest (PTI) Australia, the survey has become one of the region's most important sources of private sector insights, capturing exporter sentiment, business performance, emerging opportunities, and the challenges faced by Pacific enterprises. Importantly, the survey recognises tourism as a key services export sector and provides a platform for tourism businesses to contribute directly to regional economic discussions.

The Pacific Tourism Organisation (SPTO) is pleased to collaborate with PTI on this Tourism Sector Report, which translates the broader survey findings into tourism-specific insights for the benefit of our member countries, industry stakeholders, and development partners. The participation of 121 tourism business decision-makers and influencers from across the Pacific region has helped create a meaningful dataset that highlights both the challenges and opportunities facing tourism enterprises today.

The findings contained in this report provide valuable insights into tourism export readiness, market access, business confidence, growth opportunities, and barriers to development. These insights will help inform regional tourism planning, support policy discussions, strengthen industry development initiatives, and contribute to the formulation and implementation of strategies that enhance the competitiveness of Pacific tourism businesses.

This collaboration reflects the shared commitment of SPTO and PTI Australia to strengthening evidence-based decision-making and supporting sustainable economic development throughout the Pacific. It also demonstrates the importance of partnerships in advancing common objectives across tourism, trade, investment, and private sector development.

We extend our sincere appreciation to all tourism operators and stakeholders who participated in the survey and shared their perspectives. Their contributions provide an important voice for the sector and help ensure that future programmes, policies, and investments are informed by the realities and aspirations of Pacific tourism businesses.

Together, we can continue to strengthen the resilience, sustainability, and global competitiveness of the Pacific tourism industry.

Christopher Cocker
Chief Executive Officer
Pacific Tourism Organisation (SPTO)

PACIFIC TOURISM ORGANISATION

BACKGROUND

SPECIFIC OBJECTIVES

The Pacific Islands Export Survey series is a biennial research survey conducted by Pacific Trade Invest with the key objective of understanding and tracking export dynamics in the Pacific Islands. The specific objectives of this study are to:

- Determine business confidence;
- Identify initiatives to increase exports;
- Understand the use of digital marketing in generating export revenue;
- Identify key export target markets;
- Understand barriers to exporting in the Pacific;
- Understand financial and investment needs;
- Understand the impact of extreme weather;
- And gather gender equality, disability and social inclusion insights for exporters.

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FIVE KEY TAKEAWAYS

PACIFIC ISLANDS EXPORT SURVEY 2026

01

Air connectivity is the sector's binding constraint.

Limited international air connectivity and high flight costs rank as tourism's leading barrier at 44% - ahead of operating costs and finance.

02

Tourism reaches markets the rest of the Pacific doesn't.

Germany (33%), the United Kingdom (32%), China (31%), Japan (27%) and France (24%) all feature as source markets at roughly double the rates seen across Pacific exporters generally - the widest market footprint of any sector in this survey.

03

Tourism grew the fastest but operators are the least optimistic.

The sector posted the strongest recent growth in the survey - a net +27 against the Pacific-wide +19 - yet its outlook for the year ahead, at a net +44, sits well below the regional +60.

04

The sector's ask is marketing, not money.

Assistance with marketing their business (50%) and better marketing of the Pacific Islands as a destination (44%) top the support priorities.

05

Tourism is the Pacific's most digital, most female-led export sector.

Ninety-five per cent of operators sell online - the highest of any sector - with 83% generating revenue through social media, and 56% of leadership roles held by women, well above the 47% Pacific average.



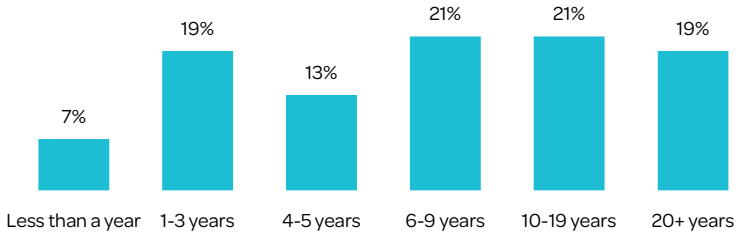
Tuvalu from the air

SAMPLE PROFILE

Business Activity

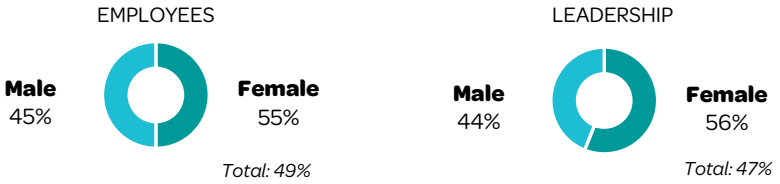
Tourism is a mature, export-dependent sector: operators average nine years servicing international visitors, and 40% generate more than three-quarters of their revenue from international visitors - with the sector average at 52%, the highest export dependency of any sector in this survey.

Time Servicing International Tourists

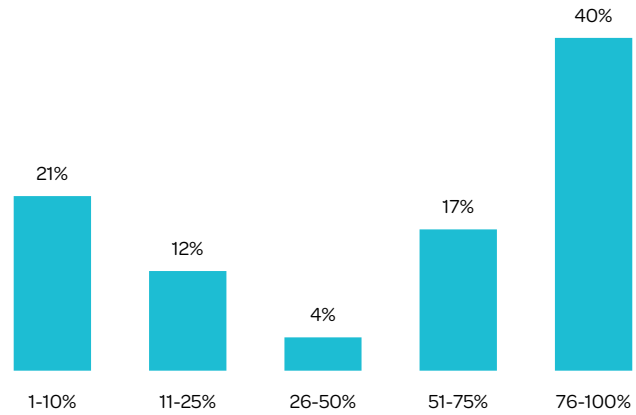


Average: **9 years**

Gender Divide



Proportion of Revenue from International Visitors

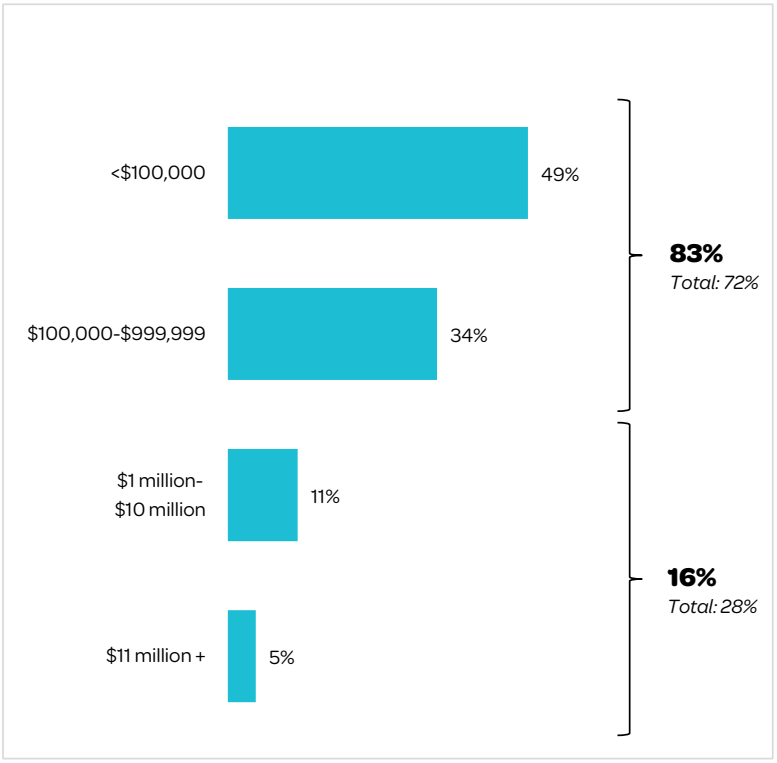


Average: **52%**

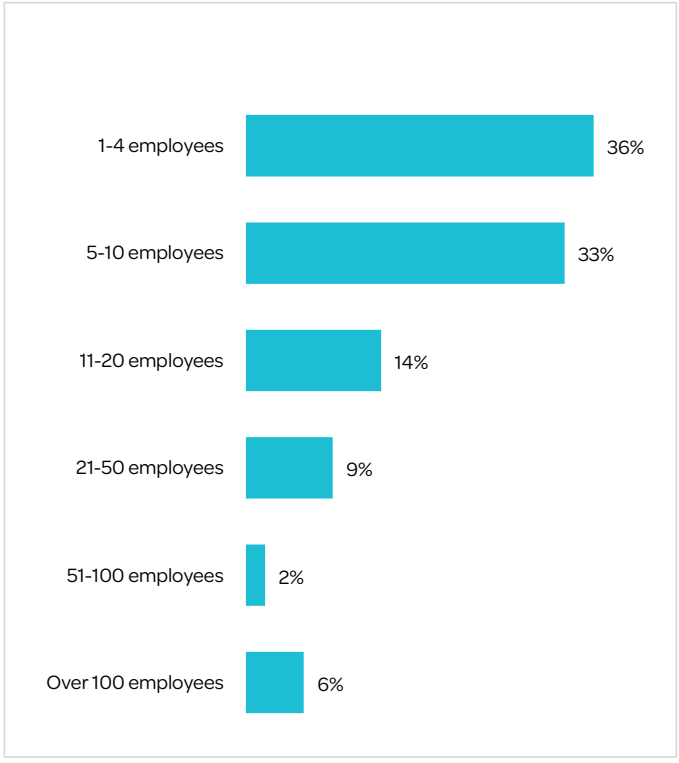
Firmographics

Tourism businesses across the Pacific skew small, with almost half (49%) generating less than $100K annually and 69% employing ten staff or fewer. In this sector, accomodation providers make up the largest portion (46%), followed by tours (36%) and food service (18%).

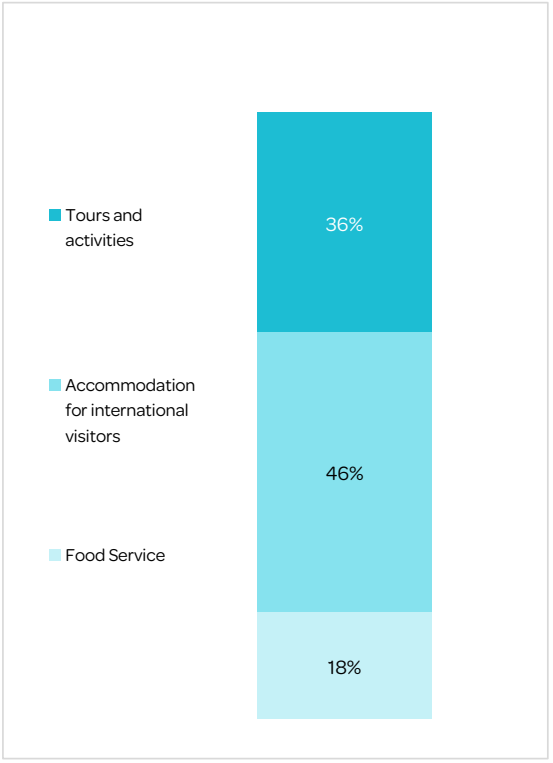
Annual Revenue



Number of Employees



Main Activity





TOURISM SENTIMENT & BEHAVIOUR

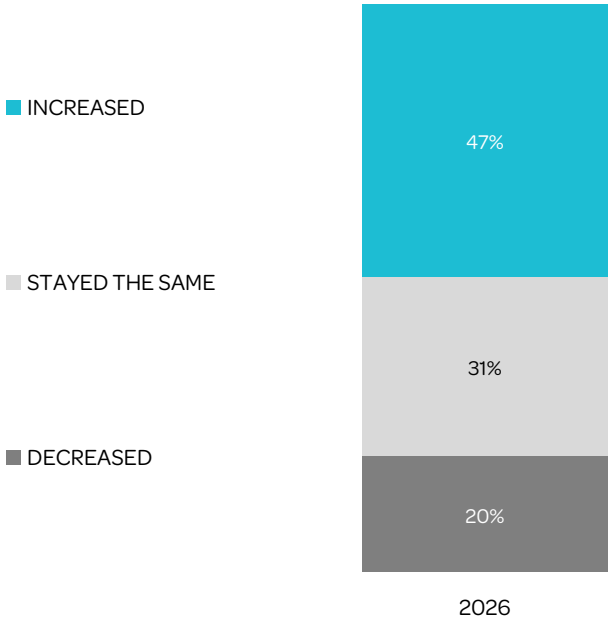
Tourism Sentiment

While Pacific tourism has reported the strongest industry revenue growth over the past year, with a net 27% increase compared to the Pacific-wide 19%, the longevity of this growth is questionable. Expectations amongst tourism operators indicate a net 44% increase in revenue, significantly below the Pacific-wide 60%, with 9% expecting decline - the most cautious outlook in this survey.

Over the last 12 months, has your tourism revenue increased, decreased, or stayed the same?

Tourism NET: **+27%** ▲

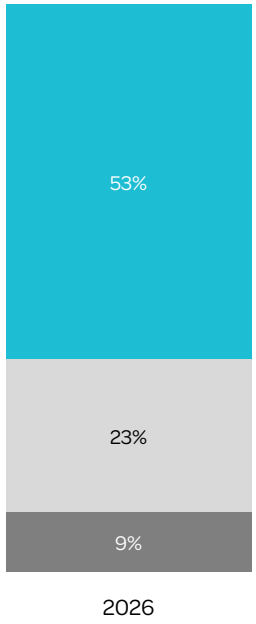
Total NET: *+19%*



Over the next 12 months, do you expect your tourism revenue to increase, decrease, or stay the same?

+44% ▼

+60%

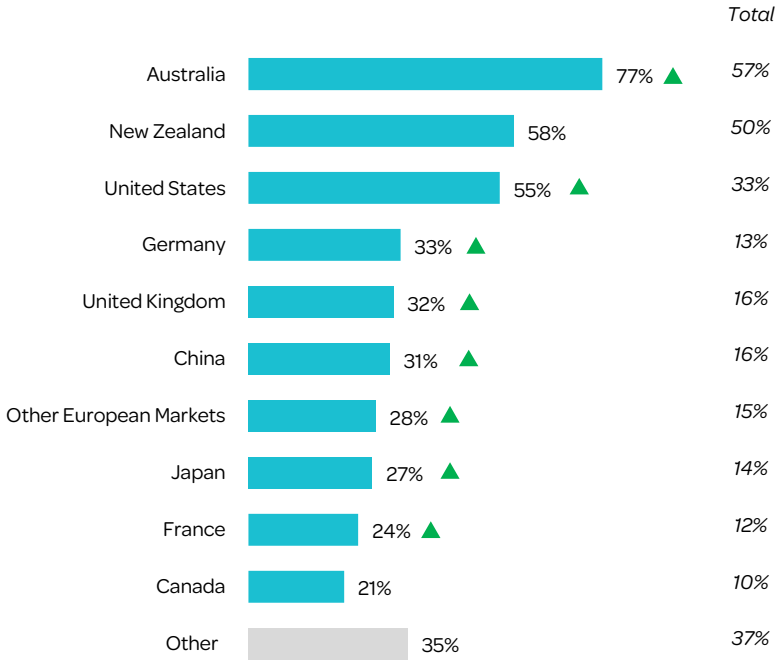


▲▼ Sig. higher/lower than total

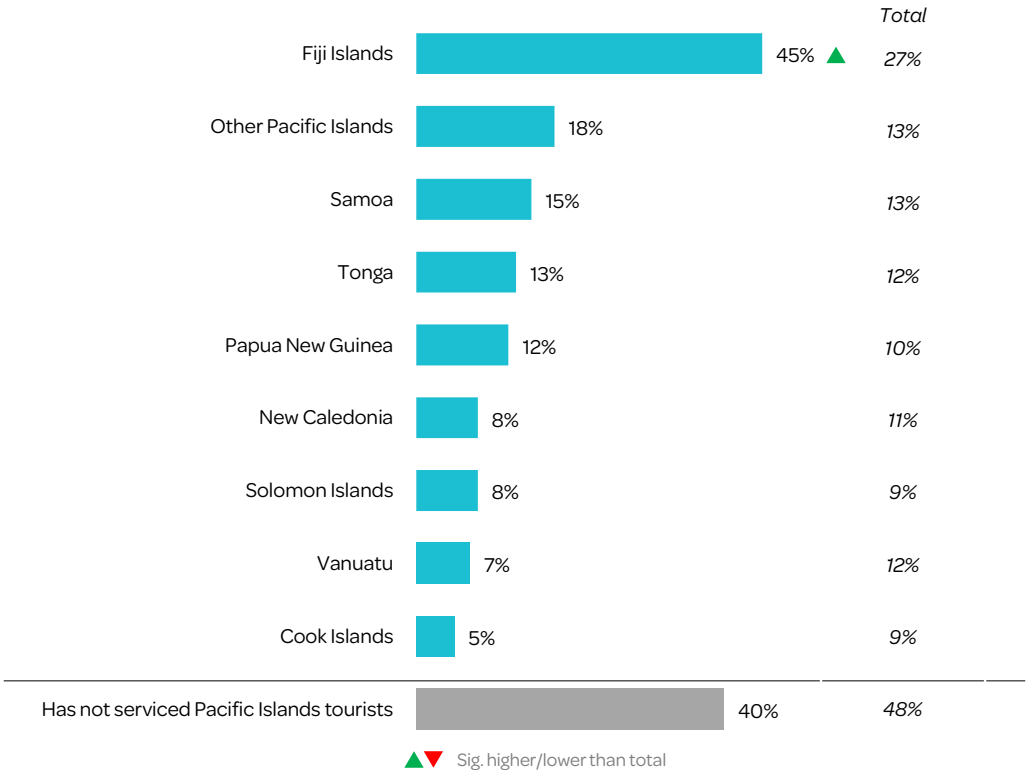
International markets over past 12 months

Tourism throughout the Pacific is enjoyed by many, with Australia (77%), New Zealand (58%), and the United States (55%) anchoring the sector's source markets. While these figures are all above the Pacific-wide export averages, the tourism sector's distinguishing factor is breadth, with Germany (33%), the UK (32%), China (31%), Japan (27%) and France (24%) all featuring at roughly double the Pacific-wide rates.

Tourists Country of Origin



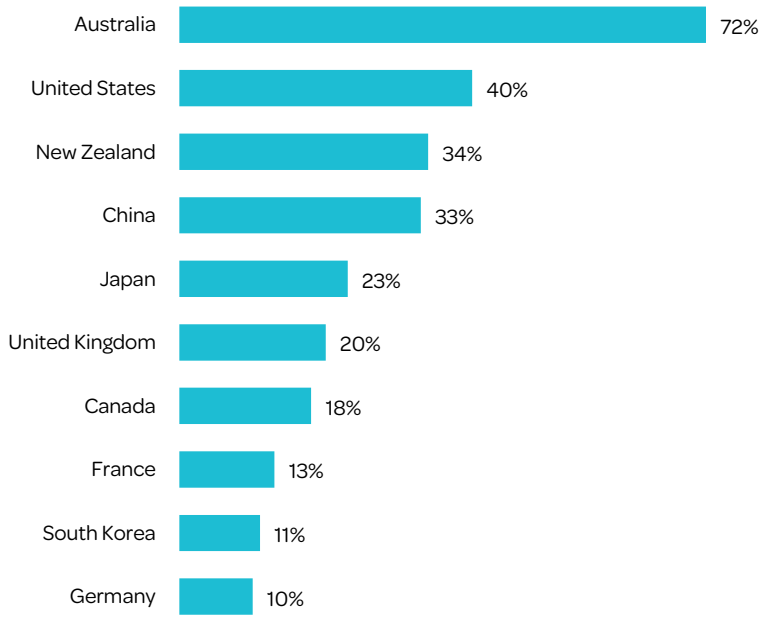
Tourism within Pacific Islands



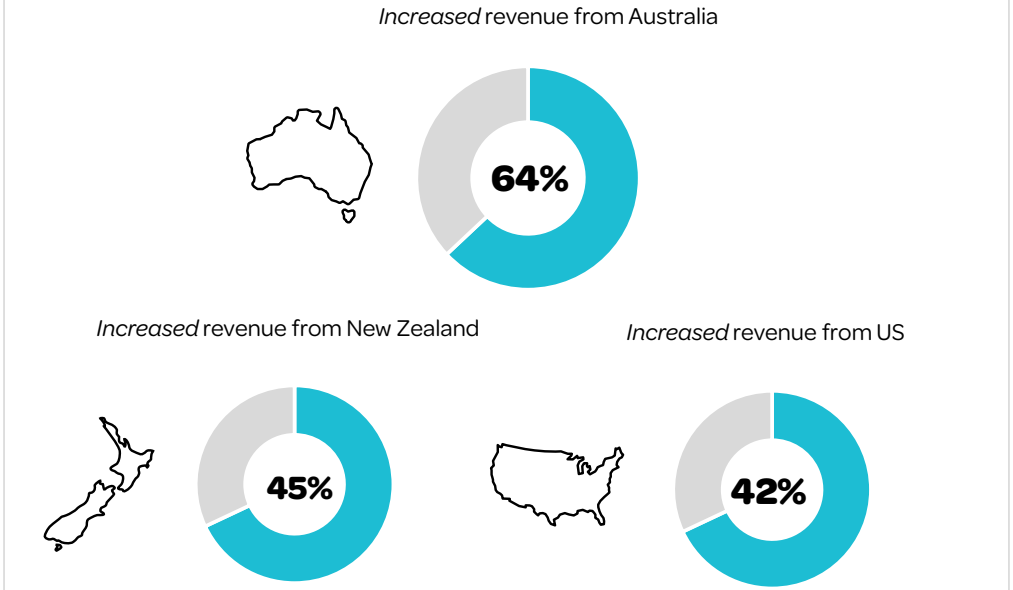
Future tourism targets

Within the Pacific tourism industry Australia leads as a favourable new market target (72%), followed by the United States (40%), New Zealand (34%) and China (33%) comparably. For markets already serviced, tourism operators have continuing high hopes for Australia, with 64% expecting increased revenue from the region.

What new markets will you target over the next 3 years?



Do you expect your tourism revenue from markets you currently service, to increase, decrease or remain the same over the next 12 months?



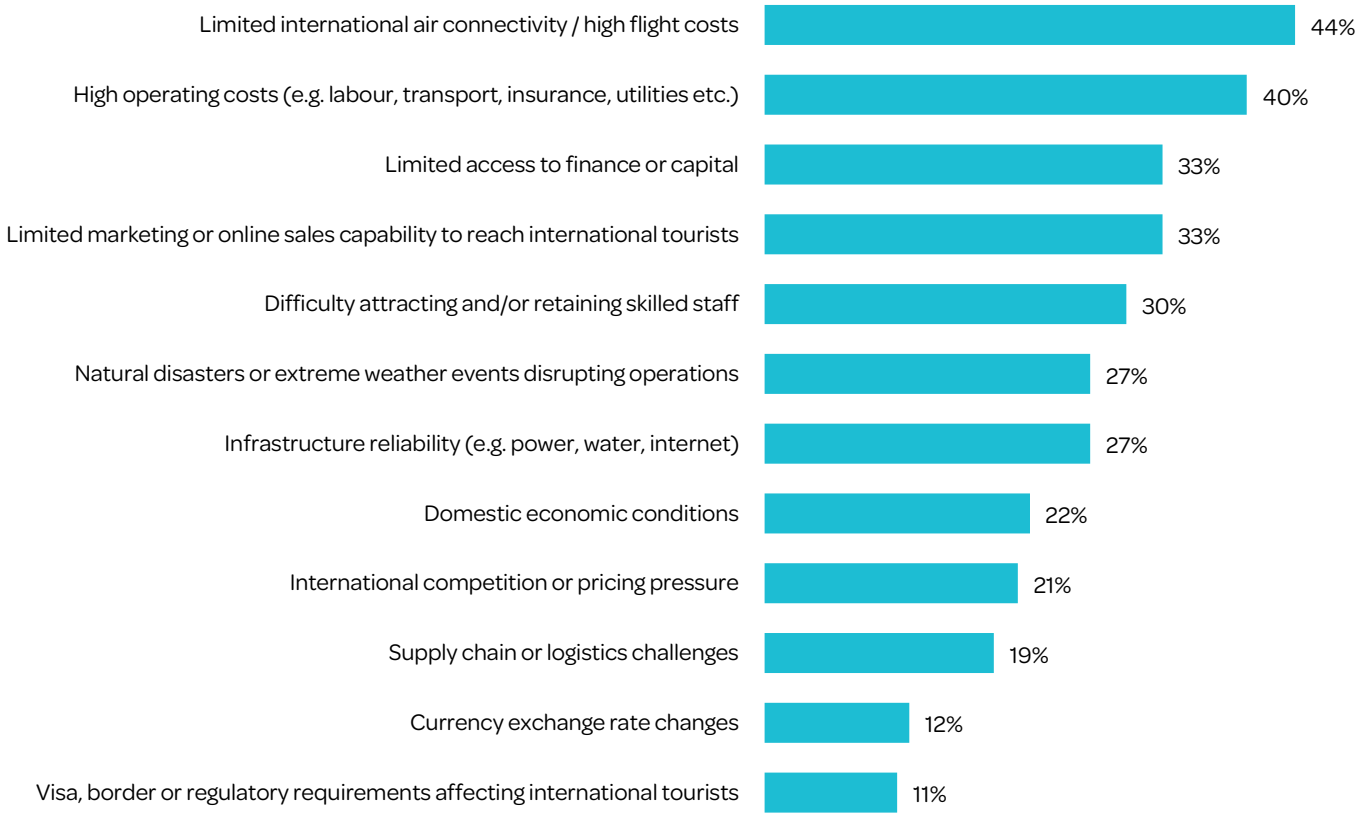


BARRIERS, ASSISTANCE & FINANCE

Tourism Challenges

Challenges within the tourism sector indicate a high dependence on aviation, which is to be expected when servicing international tourists. Businesses report limited air connectivity and high flight cost as the leading barrier at 44%. Below the Pacific-wide challenges of operating costs, financial access, and marketing capacity, another pattern emerges. Challenges with staffing (30%) and infrastructure reliability (27%) showcase the sector's dependence on service capacity.

WHAT ARE THE MAIN BARRIERS TO SERVICING INTERNATIONAL TOURISTS?



Tourism Assistance

In terms of assistance priorities, the Pacific tourism sector is acutely aware of the importance of marketing. Half of tourism businesses want support with company-specific marketing, while 44% want better exposure for the Pacific Islands as a destination.

Following this, priorities shift to conversion, with businesses wanting assistance in online sales capacity (41%) and better access to financial technology (40%). Direct financial assistance sits significantly lower at 24%, indicating businesses are prioritising demand generation first and foremost.

WHAT FORMS OF ASSISTANCE WOULD ENCOURAGE YOU TO INCREASE YOUR INTERNATIONAL TOURISM ACTIVITY?



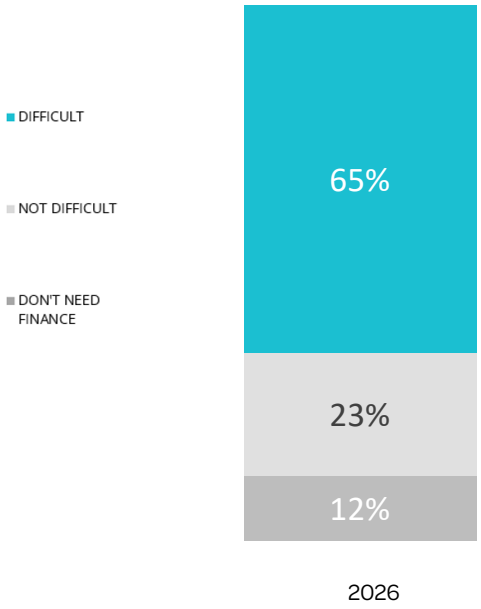
Finance

Businesses in the Pacific tourism sector report a difficulty in obtaining finance (NET 53%). While this is slightly below the regional average, this still demonstrates a significant hurdle for the sector. Leading reasons are businesses not being in a position to borrow (46%) and high interest rates (41%).

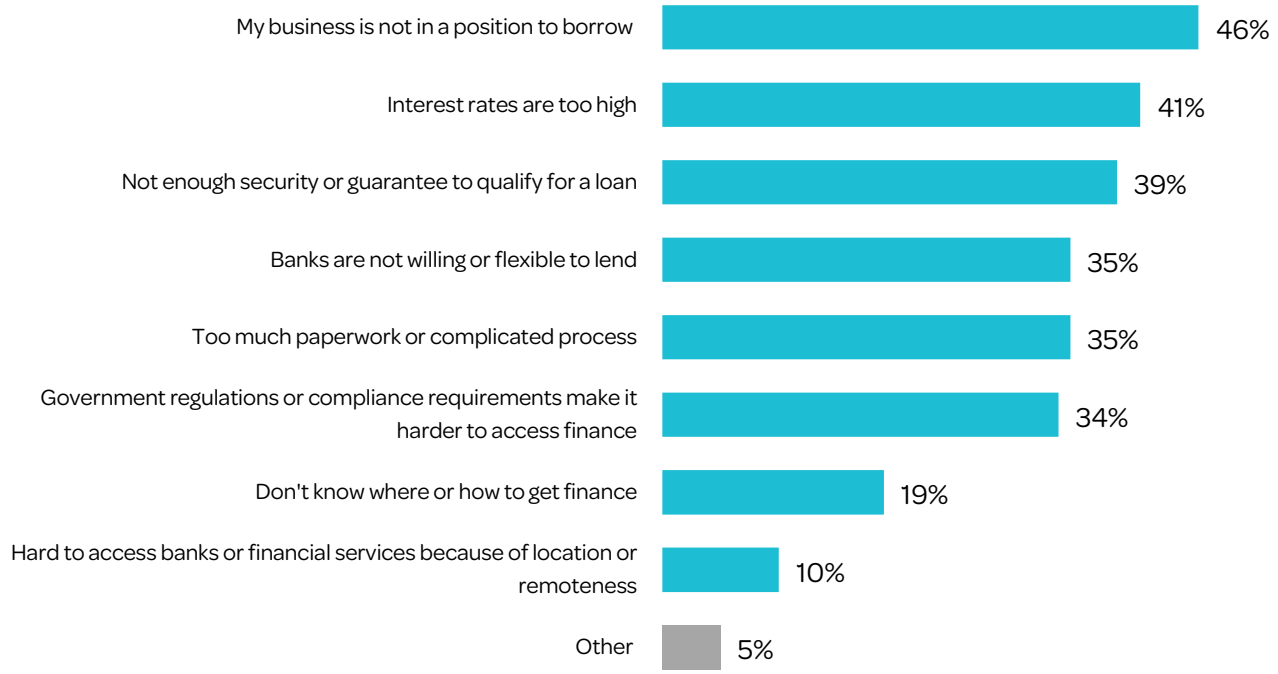
Is it difficult for your business to obtain finance?

Tourism NET: **53%**

Total NET: *60%*



Why do you find it difficult to obtain finance?





ONLINE SALES & AI

Online Distribution

Overwhelmingly Pacific tourism operators generate their revenue online, with 95% reporting sales through online channels. This represents the highest of any industry sector, and is well above the Pacific-wide average of 88%.

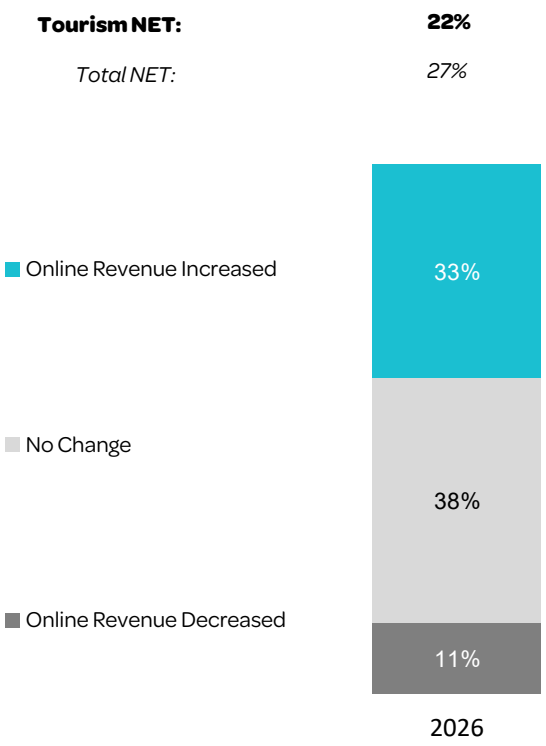
Of the specific online channels, social media platforms dominate this revenue generation at 83%, followed by individual websites and booking platforms both at 51%. In the last year, businesses report a net growth of 22% in online revenue, broadly in line with regional figures.

95%

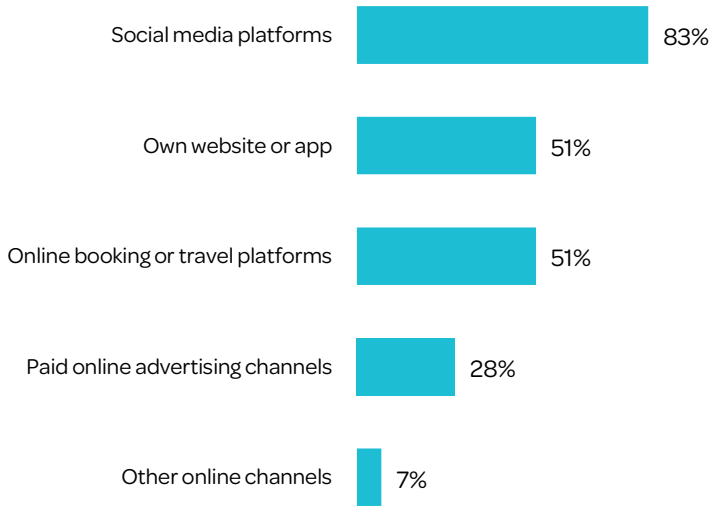
sell through online channels.

(Total: 88%)

How has your tourism revenue generated through online channels changed over the past 12 months?



Which of the following online channels does your business use to generate tourism revenue?



Artificial Intelligence

The use of AI is common in the tourism sector and only expected to grow, with a third of operators using AI tools and a further 51% planning to adopt them. Despite this uptick, sentiment around AI is more measured than the regional norm, with 57% expecting AI to improve financial performance against the Pacific-wide 71%. Current AI use centres around marketing content and understanding customer needs.

IN WHICH AREAS ARE YOU USING (OR PLANNING TO USE) AI TO SUPPORT YOUR OPERATIONS?

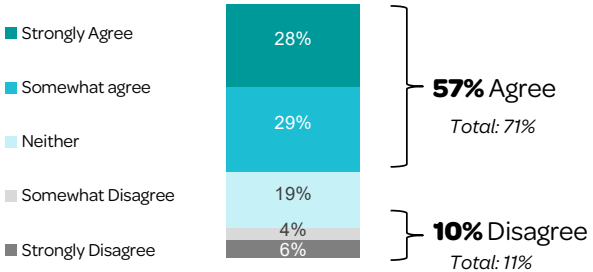
AI Adoption

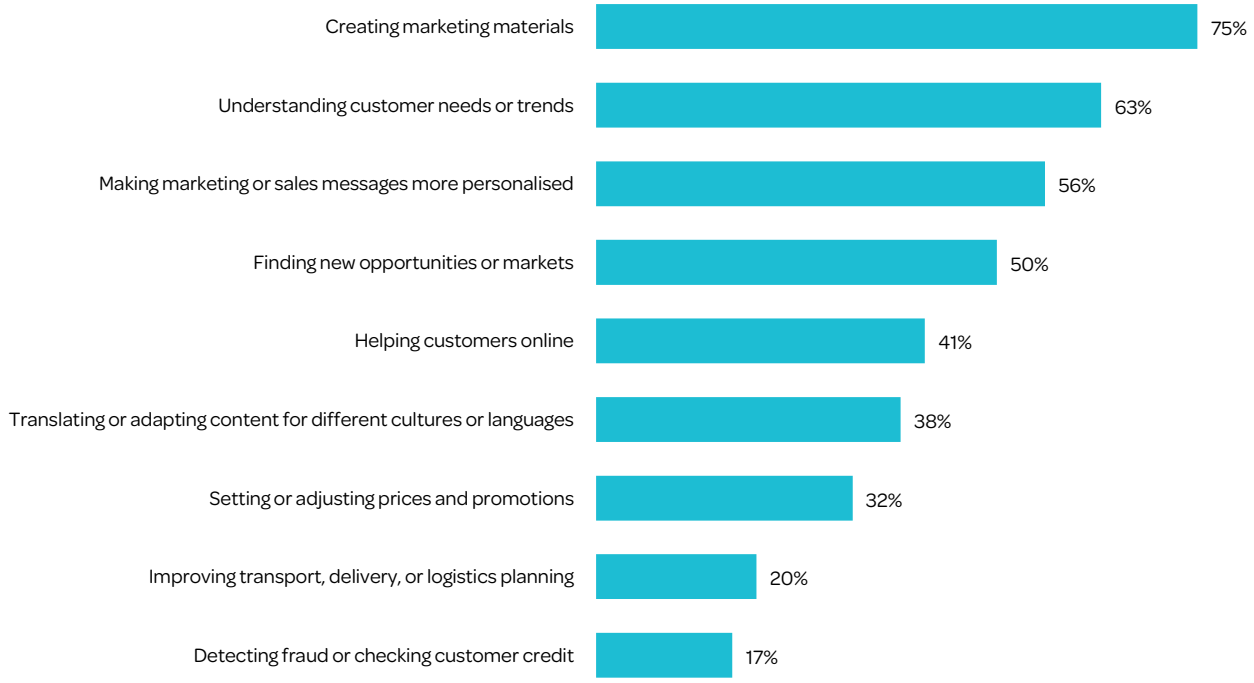
33% currently using AI
Total: 38%

51% planning to adopt AI
Total: 45%

Attitude to AI

"AI will positively impact the financial performance of our business over the next 3 years."





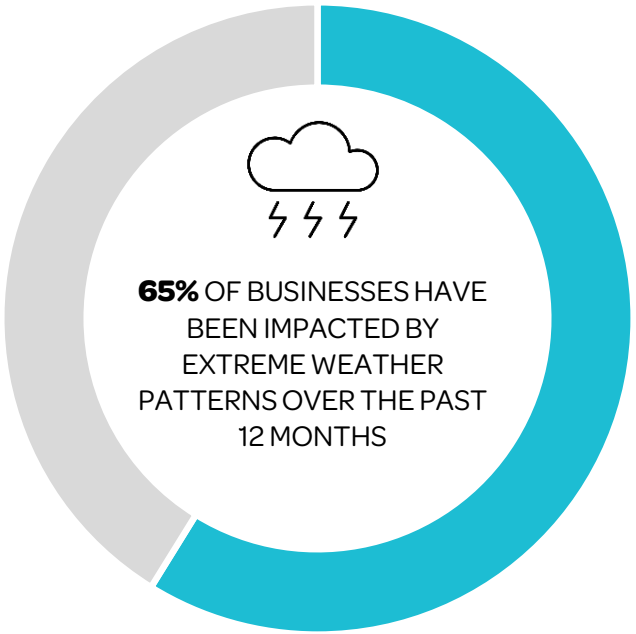


IMPACT OF EXTREME WEATHER PATTERNS

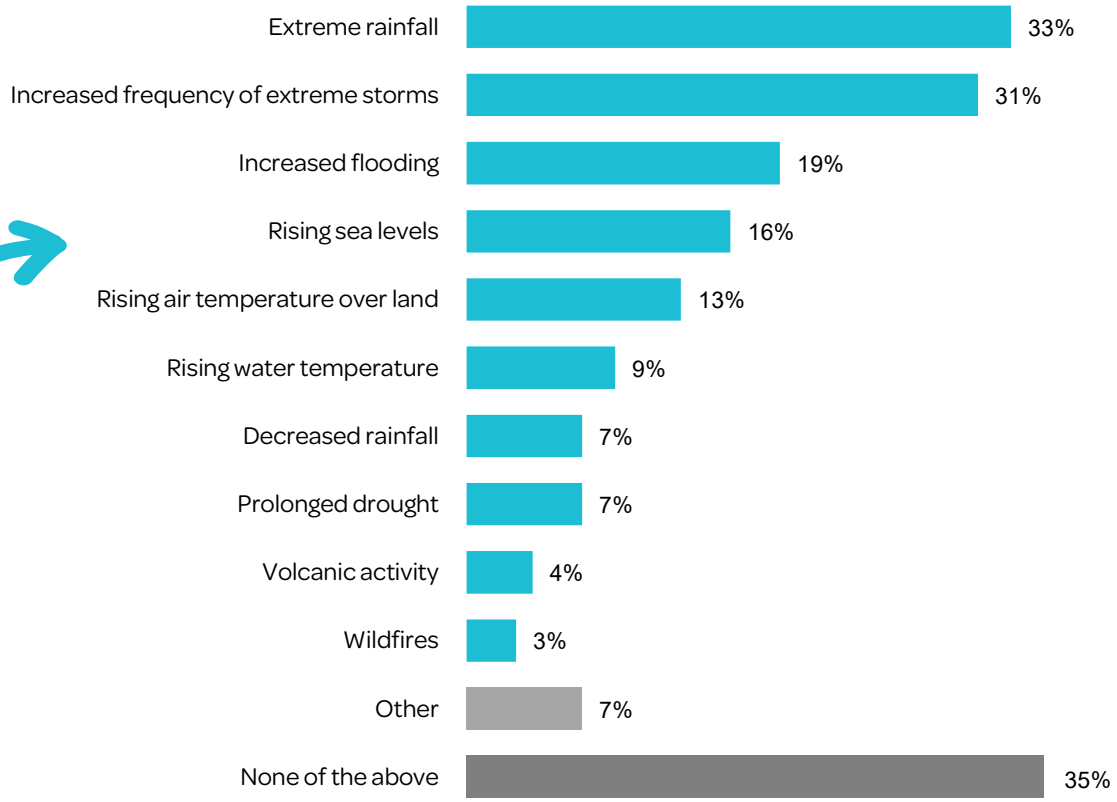
Impact of extreme weather patterns

As with most industries in the region, the Pacific tourism sector has been heavily impacted by extreme weather over the past year. 65% of operators report an impact, mirroring the Pacific average exactly. Of the specific weather events, extreme rainfall (33%) and increased frequency of extreme storms (31%) make up the largest contributors, with flooding (19%) and rising sea levels (16%) following.

HAVE ANY OF THE FOLLOWING EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS OVER THE PAST 12 MONTHS?



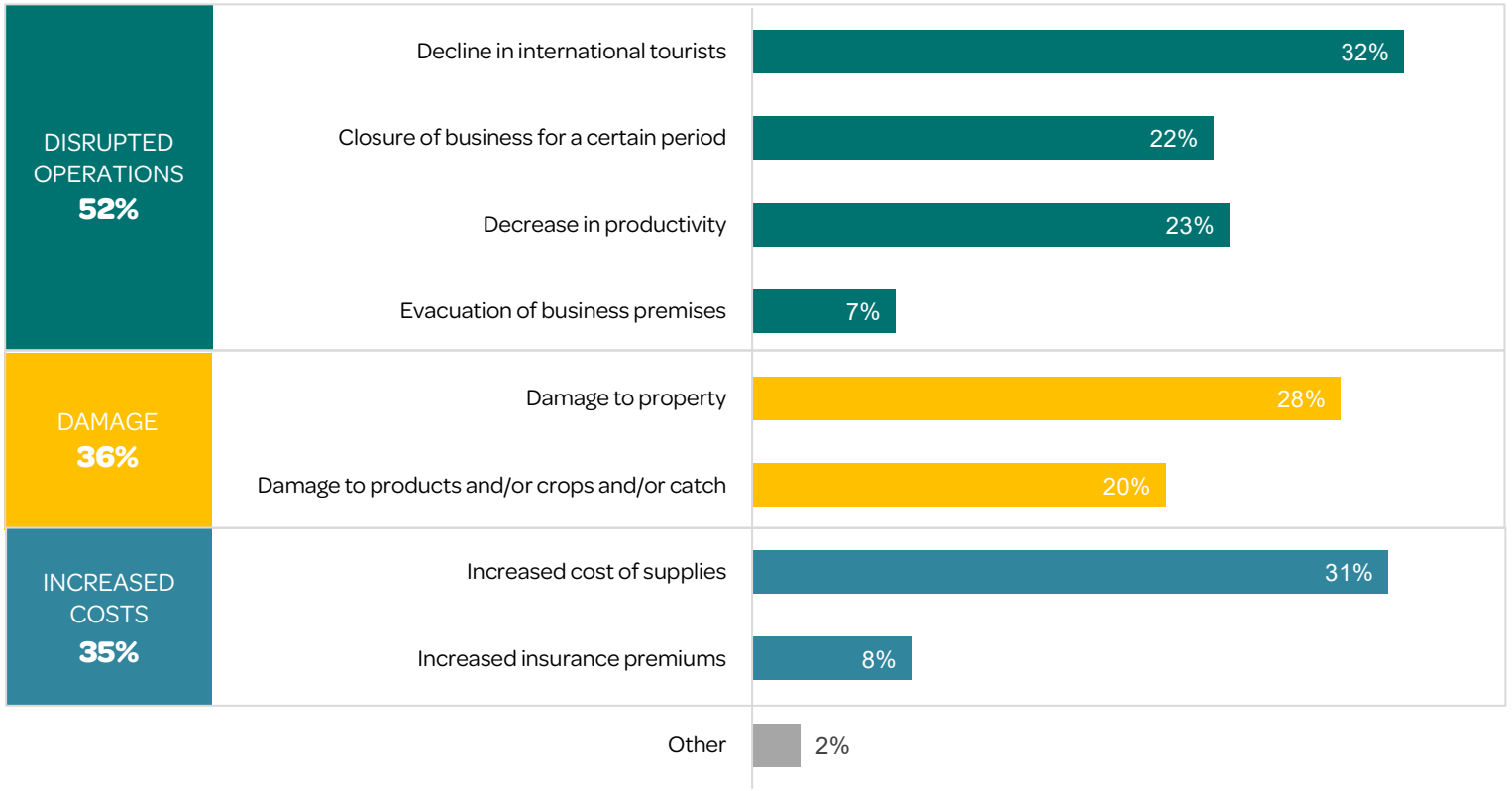
Total: 65%



Impact of extreme weather patterns

For tourism businesses impacted by extreme weather patterns, disrupted operations were the most common consequence at 52%. The largest disruptor of these operations was attributed to the sector-specific impact of declining international visitor numbers when weather events strike. Other impacts of extreme weather were damage (36%) and increased costs (35%).

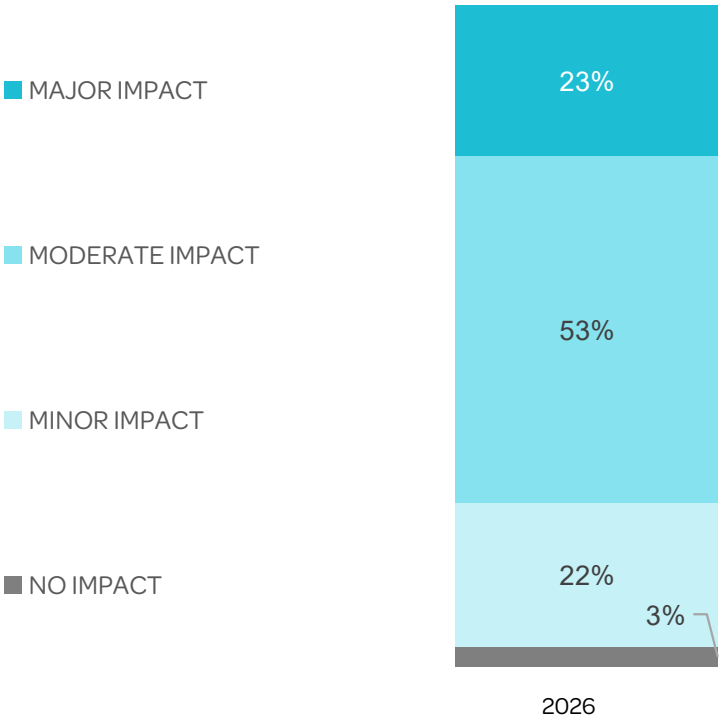
HOW HAVE THESE EXTREME WEATHER PATTERNS IMPACTED YOUR BUSINESS?



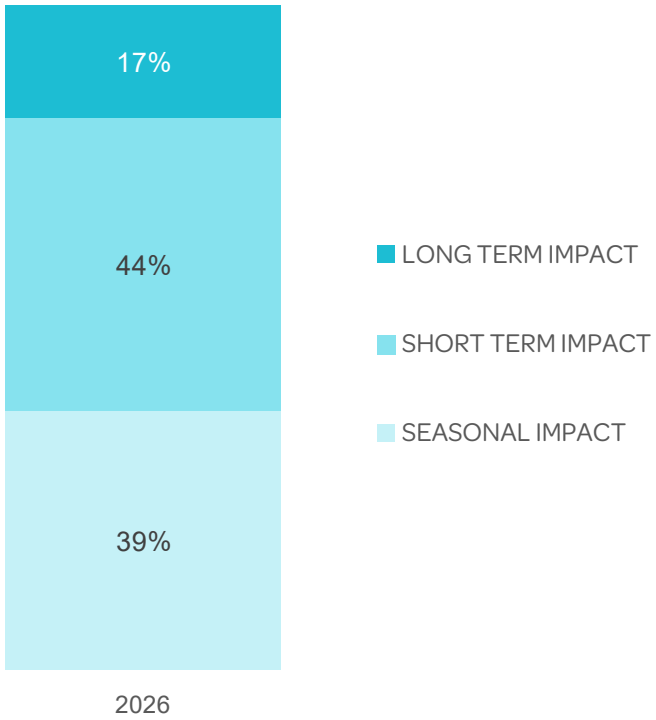
Impact of extreme weather patterns

The impact levels of extreme weather for tourism operators fall in line with Pacific averages, with 23% reporting major impacts and only 3% reporting no impact. The longevity of these impacts on tourism businesses was predominantly short term (44%) and seasonal (39%).

To what extent has your business been impacted by these weather patterns?



And what was the timeframe of this impact?





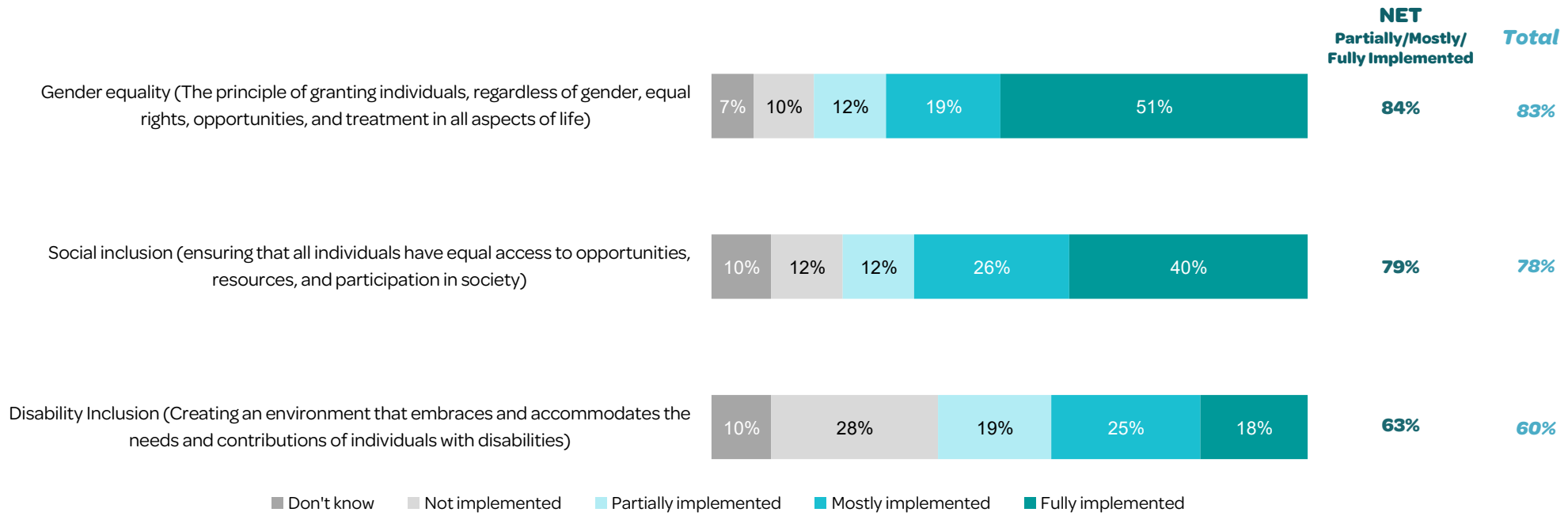
GENDER EQUALITY, DISABILITY & SOCIAL INCLUSION

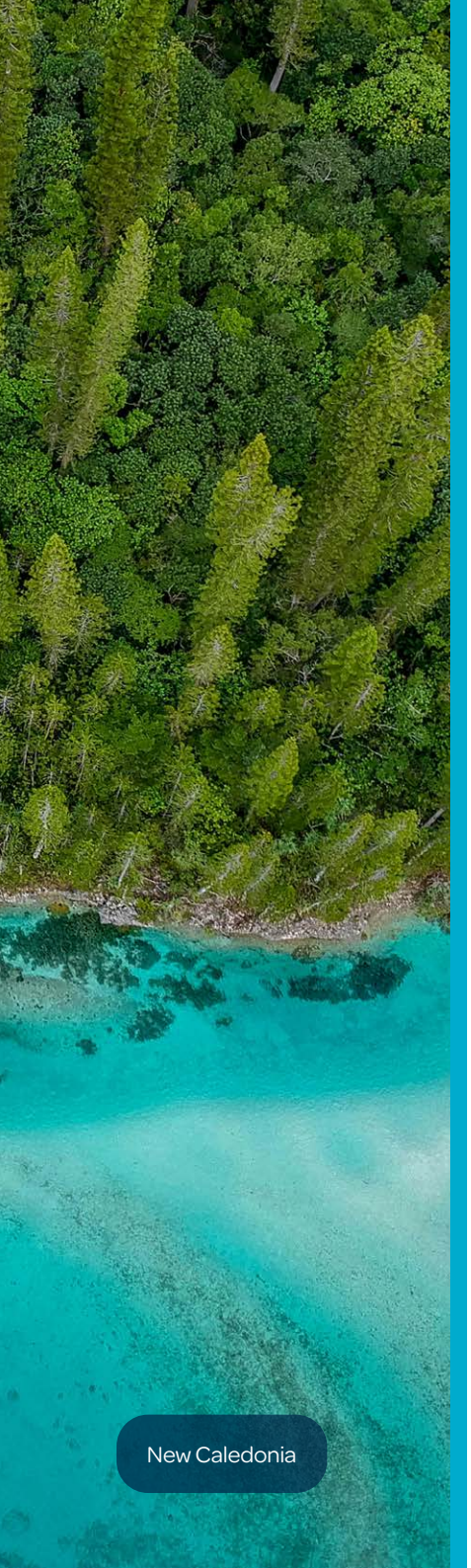
Implementation of GEDSI policies and practices

Within the tourism industry, the implementation of Gender Equality, Disability, and Social Inclusion (GEDSI) policies tracks slightly ahead of Pacific average across all measures.

The majority of operators report implementing policies that address gender equality (84% vs 83%), social inclusion (79% vs 78%), and disability inclusion (63% vs 60%).

TO WHAT EXTENT HAVE GENDER EQUALITY, DISABILITY AND SOCIAL INCLUSION (GEDSI) POLICIES AND PRACTICES BEEN IMPLEMENTED THAT ACTIVELY PROMOTE AND SUPPORT...?





New Caledonia

RESEARCH METHODOLOGY

WHO RESPONDED

A total of 431 surveys were completed across all exporting sectors in the Pacific Islands Export Survey 2026. This report focuses on the 121 responses from tourism business decision-makers and influencers, all generating revenue through international visitors.

HOW

Respondents completed a 15-minute quantitative online survey.

WHEN

Online responses were collected between 2 March and 12 April 2026.

Survey invitations were distributed by Pacific Trade Invest Australia and partners.

PACIFIC TRADE INVEST

As the Pacific's leading trade and investment promotion agency, Pacific Trade Invest (PTI) works to improve the livelihoods of Pacific people by enabling decent work and economic growth in the Blue Pacific.

We develop and promote businesses from the Pacific region through trade, investment and tourism facilitation. PTI is an agency of the Pacific Islands Forum Secretariat, funded through the support of our host Governments, the Government of Australia, the Government of New Zealand, and the Government of the People's Republic of China.

Pacific Trade Invest

SOUTH PACIFIC TOURISM ORGANISATION

The Pacific Tourism Organisation (SPTO) is the Pacific region's mandated tourism agency, supporting the sustainable development and promotion of tourism across Pacific Island countries and territories. Established in 1983, SPTO works with governments, industry partners and development organisations to strengthen tourism growth, resilience and regional cooperation.

SPTO promotes the Pacific as a world-class visitor destination while supporting research, industry development, sustainability initiatives and tourism policy. Through regional partnerships and advocacy, SPTO helps ensure tourism delivers long-term economic, social and environmental benefits for Pacific communities.

SPTO PACIFIC TOURISM ORGANISATION

ACKNOWLEDGEMENTS & DISCLAIMER

Acknowledgements

PTI and survey partners would like to thank the Pacific export companies that took part in the survey and our on-the-ground partners who shared the survey through their networks.

Disclaimer

The information presented in this report is based on information received by research company Fifth Quadrant from a survey administered from 2 March - 12 April 2026

Pacific Trade Invest

PACIFIC ISLANDS FORUM

PACIFIC TOURISM ORGANISATION