



Limu Pools, Niue

DESTINATION INFORMATION AT A GLANCE

POPULATION:

1,900 (2020).*

CAPITAL:

Alofi (4,680 kilometers east of Cairns, 2,480 kilometers northeast of Auckland and 1,280 km east of Fiji).

OFFICIAL LANGUAGES:

Niuean and English. Both languages are widely spoken and many Niueans are bilingual.

CLIMATE:

Niue has a warm tropical climate, with maximum temperatures ranging from 20°C to 28°C in winter and from 22°C to 30°C in summer.

CURRENCY:

New Zealand dollar (NZ\$). Niue has no ATMs, but most businesses have electronic funds transfer at point of sale and credit card facilities.

ENTRY AND VISA REQUIREMENTS:

For stays of less than 30 days, all tourists with an onward ticket and sufficient funds to cover their length of stay do not require a visa.

GEOGRAPHY:

A raised coral atoll, Niue is one of the world's largest coral islands.

*Asian Development Bank. 2021. *Key Indicators for Asia and the Pacific* 2021. Manila.

Niue

PACIFIC TOURISM SECTOR SNAPSHOT | NOVEMBER 2021

INTRODUCTION

Despite its small size, Niue has plenty to attract visitors and is a popular and highly regarded Pacific destination. Niue has crystal clear waters, an abundance of sea life, and is exploring emerging tourism opportunities—including its recent accreditation as a “Dark Sky Place” for stargazers.

The tourism sector is the main driver of economic growth in Niue. Tourism accounts for an estimated 28% of Niue’s gross domestic product (GDP) (Pacific Tourism Organisation [SPTO] 2020) and employed almost 300 Niueans in 2019—over 40% of the country’s total employment.¹

The limited carrying capacity of the small island constrains significant growth in tourist numbers. The Government of Niue has made developing sustainable tourism a priority. It is focusing on attracting higher-yield visitors and increasing tourism in the low periods—potentially by expanding the meetings and events market and building the shoulder season.

1 Estimate based on data from Pacific Tourism Organisation (SPTO) (2019 and 2020).

TOURISM SECTOR OVERVIEW

Note: this overview compiles key tourism information based on the most recent available data. Due to the impact of the coronavirus disease (COVID-19) on the tourism sector, some of this information has likely changed.

TRANSPORT AND CONNECTIVITY

Before COVID-19 forced international border closures in early 2020, Niue was connected by a twice-weekly return service to Auckland via Air New Zealand. Passenger numbers on these flights were high, up to 93% of capacity in peak season, dropping to 54% in low season (TRC Tourism 2018). A 2018 carrying capacity study, conducted to assess the potential for a third weekly flight, found an additional flight could result in the island's carrying capacity—in terms of accommodation supply, staff availability, and environmental protection—being exceeded (TRC Tourism 2018). The study proposed Niue retain the twice-weekly flights and consider the progressive introduction of a larger aircraft.

ACCOMMODATION

In 2019, Niue had an estimated 41 accommodation options, totaling around 300 beds (Jenkins 2019). Most accommodation is self-catering holiday homes, although there are some backpacker facilities. The island's only full-service hotel—the Scenic Matavai Hotel, which includes resort, apartments, and villa units—accounts for around 35% of available bed space (Jenkins 2019).

Most of Niue's accommodation is moderate to basic quality. The Scenic Matavai Hotel is considered 3 to 3.5 stars and only a couple of accommodation options, totaling around six beds, are 4-star plus. However, despite few high-end accommodation options, Niue's mostly older, well-educated, and high-income visitors consistently rate Niue's accommodations favorably. The most recent of Niue's Visitor Surveys found over 80% of visitors were either "satisfied" or "very satisfied" with their accommodation (New Zealand Tourism Research Institute [NZTRI] 2019a).

ORGANIZED TOURS

Niue has 21 tour operators (Niue Tourism Office, unpublished data). Nine are land-based and offer tour options ranging from island orientation and nature hikes to learning about Niue's native vanilla and coconut crabs. A further 12 operators offer marine tours, mostly fishing.

EMPLOYMENT AND TRAINING

Many Niueans prefer jobs in the public sector to the tourism sector. This reflects the more consistent work and the benefits available in the public sector. Positions in the public sector are generally well-paid and offer a four-day working week. Still, many Niueans do work in the tourism sector. They generally prefer to run their own small businesses and regard jobs such as housekeeping or waiting tables as unattractive (Jenkins 2019).

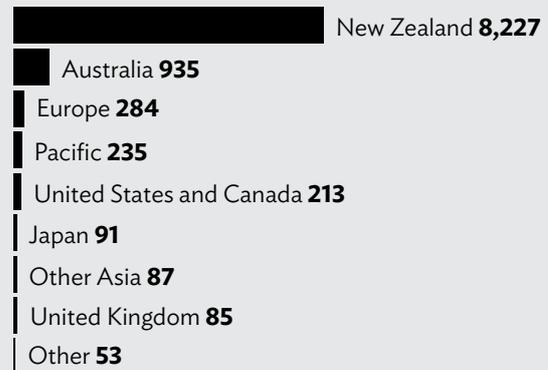
Box 1: Niue Key Visitor Statistics (Air Arrivals)

Air Arrivals (2019)

10,210 visitors.

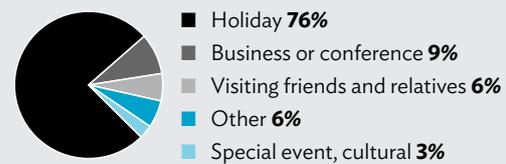
Source: Pacific Tourism Organisation.

Air Arrivals by Source Country (2019)



Source: Pacific Tourism Organisation.

Purpose of Visit (2019)



Source: New Zealand Tourism Research Institute. 2019. *Niue Visitor Survey, April to September 2019*. Auckland.

Tourism Receipts (2019)

\$7.8 million.

Source: Pacific Tourism Organisation. 2020. *2019 Annual Visitor Arrivals Report*. Suva. (Estimate).

Visitor Spend (2019)

NZ\$1,428 per person.



Source: New Zealand Tourism Research Institute. 2019. *Niue Visitor Survey, April to September 2019*. Auckland.

Source: Pacific Private Sector Development Initiative.

Box 2: Niue Key Visitor Statistics (Sea Arrivals)

Cruise Arrivals (2019)

4 cruise ships per year (approximate), with short stopovers and limited local spending.

Yacht Arrivals (2019)

Between **60 and 150 yacht visitors per month** (June–October).

Yacht Spend (2019)

NZ\$20 fee per yacht per night, which also provides access to moorings and wharf facilities such as showers and toilets.

Source: Jenkins, M. 2019. *Niue as a Sustainable Tourism Destination*. Unpublished.

Niueans have ready access to tourism education. The University of the South Pacific has a campus in Niue, and opportunities in New Zealand are available to Niueans through the free association. However, this can contribute to outmigration, as many Niueans choose not to return home from New Zealand at the completion of their studies. Since 1974, Niue has experienced the largest population decline of any sovereign country (Asian Development Bank [ADB] n.d.). Niue's Chamber of Commerce has more recently been offering in-country tourism training—from workshops in customer service and tour guiding, to training in information technology and astrophotography.

The friendliness of Niueans is regarded as one of the “most appealing” aspects of the visitor experience (NZTRI 2019b). The Niuean community has a positive attitude towards tourism. A 2018 survey of residents found 75% saw the impact of tourism as “positive” or “extremely positive” to the community (Jenkins 2019).

Box 3: Niue Visitor Arrival Trends

Air Arrivals (2015–2019)



Source: Pacific Tourism Organisation.

Tourist arrivals in Niue increased steadily during 2015–2019. The number of arrivals rose by 32% over this period (Pacific Tourism Organisation, unpublished data) despite a slight decrease in 2019.

Niue's tourist arrivals are highly seasonal. There is a defined peak each year from May to November, and visitation is highest during July and August. Arrival numbers are noticeably lower during the summer cyclone season, which runs from November to April (Jenkins 2019).

References:

Jenkins, M. 2019. *Niue as a Sustainable Tourism Destination*. Unpublished.

Source: Pacific Private Sector Development Initiative.

TOURISM GOVERNANCE, PLANNING, AND POLICY

The Government of Niue is committed to tourism, and sustainability is integrated into its tourism planning.

The country's major tourism-related plans and policies are outlined in Table 1. In addition, the Niue Tourist Authority, with support from the Chamber of Commerce, has developed several sustainability initiatives, including the “Responsible Tourism Code for Visitors” and the “New Business and



Produce for sale at village market, Alofi

Table 1: Tourism Plans and Policies, Niue

PLAN OR POLICY	STRATEGIES AND GOALS
Niue National Strategic Plan 2016–2026	<p>A roadmap setting out the Government of Niue’s directions and policies, launched in 2016.</p> <p>The plan states “the tourism industry will continue to flourish and with ancillary activities will be the major contributor to the economy.” The plan also prioritizes sustainability and suggests “Niue’s unique unspoiled and pristine coastal environment will be internationally recognized as a beacon for its sustainable and responsible environmental practices and this is how the Niuean environment will be protected” (Government of Niue 2016).</p>
Experience Development Strategy	<p>Niue’s current tourism sector strategy, launched in 2015.</p> <p>The Experience Development Strategy (TRC Tourism 2015), led by the Niue Chamber of Commerce, aims to deliver environmental conservation improvements, develop new infrastructure sensitive to the island’s land and seascape, and position Niue as an unspoiled and unique island environment. The strategy proposes a visitor target of 15,000 per year—focused on high-yield visitors—and estimates Niue’s current infrastructure and size can accommodate no more than 20,000 visitors per year. The main challenge, it suggests, is to grow the benefits from tourism while retaining Niue’s authentic appeal as a destination.</p>
Niue Responsible Tourism Policy	<p>The Government of Niue’s guide for tourism operations, adopted in 2017.</p> <p>The Niue Responsible Tourism Policy (Niue Tourism Office 2017) is designed to guide the operation of the tourism industry and support best practice environmental initiatives.</p>

References:

Government of Niue. 2016. *Niue National Strategic Plan 2016–2026*. Alofi.
 Niue Chamber of Commerce. 2015. *Experience Development Strategy*. Alofi.
 Niue Tourism Office. 2017. *Niue Responsible Tourism Policy*. Alofi.

Source: Pacific Private Sector Development Initiative.

Marine Tour Operator Standards” as well as conducting a carrying capacity assessment.

TOURISM MARKETING

The Niue Tourist Authority is responsible for tourism policy, planning, and marketing. The authority, mandated under the Tourist Authority Act 1995, has six appointed board members and a Director of Tourism, who is also the chief executive officer. Tourism operations are run from the Niue Tourism Office in Alofi, which has eight full-time staff members.

Niue is marketed internationally with the tagline “Niue: Nowhere Like Us.” The tagline emphasizes Niue’s destination positioning—pristine, remote, peaceful, innocent, traditional, undeveloped, and uncrowded—as outlined in the Experience Development Strategy. Niue’s main selling propositions are its focus on sustainability and its pristine natural environment. The official tourism website² is simple and user-friendly, offering visitor information about experiences, events, and accommodation. In addition, a smartphone app, Go! Niue, was

launched in 2018 to help tourists navigate the country and connect with local businesses. In May 2020, Niue launched a new marketing campaign with the tagline “We’re missing you too” to pique visitor interest during COVID-19.

VISITOR DEMAND AND DESTINATION EXPANSION

Niue recently became the first country in the world to be recognized as an International Dark Sky Place. The International Dark-Sky Association—the recognized authority on light pollution and the leading organization combating light pollution worldwide—accredited Niue in 2020 as an International Dark Sky Sanctuary. Visitors to Niue can view the unspoiled night sky or take a guided Astro-tour led by trained Niuean community members.

PRIVATE SECTOR ORGANIZATION

Niue’s private sector is small but active. Around 65% of businesses in Niue are involved in tourism (TRC Tourism

² www.niueisland.com

Box 4: Niue Key Attractions

- **A rugged coastline and reef**—Dotted with caves and swimming coves.
- **Crystal clear waters**—The lack of sand, silt, or waste emptying into the water means Niue has some of the best underwater visibility in the world.
- **Excellent diving**—The narrow reef shelf provides divers with easy access to deeper waters.
- **A 127,000 square kilometer marine protected area**—Home to coral, fish, crabs, lobsters, and giant clams.
- **Abundant sea life**—Dolphins can be seen year-round and migrating humpback whales visit Niue from July to October.
- **Nature based activities**—70% of Niue’s land area is covered with forests, which protect a wide range of flora and fauna. Visitors can walk along sea tracks and in forests, explore caves and bird watch.

Source: Pacific Private Sector Development Initiative.



2018). Most tourism businesses are owner-operated, and most operators have more than one business or role in the island community. Private sector tourism operators are primarily supported by Niue’s Chamber of Commerce. There is also a smaller, less active tourism association. A 2018 study found 93% of businesses are members of the Chamber of Commerce, while 19% had joined Niue’s tourism association (NZTRI 2018).

TOURISM SECTOR CHALLENGES AND OPPORTUNITIES

TRANSPORT AND CONNECTIVITY

Niue has no public transport for visitors, and rental car shortages occur in high season. There are an estimated 140 rental cars on the island (TRC Tourism 2018). Niue’s roads are in poor condition and can result in an uncomfortable driving experience and poor-quality rental vehicles.

ENVIRONMENT AND INFRASTRUCTURE

Sustainability is a priority for Niue. Niue has a marine protected area that covers 40% of its Exclusive Economic Zone. It recently banned single-use plastic bags and has improved

the recycling of glass and plastic. Visitors consistently rate Niue highly for its environmental management—well above regional neighbours including Papua New Guinea, Samoa, Solomon Islands, and Vanuatu (NZTRI 2019c). The country is now looking to become accredited by the Global Sustainable Tourism Council as a Sustainable Tourism Destination.

Niue has plentiful fresh water from wells, bores, and the harvesting of rainwater, but has in the past experienced periods of necessary water conservation and severe drought (Government of Niue 2001 in Government of Niue 2004).

To prevent future shortages, reticulated water is now drawn from the country’s freshwater lens and steps are being taken to replace reservoir storage and ensure reserve capacity (Jenkins 2019). Niue has 100% electricity coverage with 22% of supply generated from renewables (ADB 2020). Although Niue still has a high reliance on diesel-generated energy, it has a target of 80% renewable energy by 2025 (Jenkins 2019).

Niue’s solid waste, sewerage treatment, and water waste systems could be improved. The generation of solid waste has generally exceeded the country’s capacity to process it. Niue has no public sewerage or water waste system, with waste being stored in septic tanks and then disposed of on land. Although regular monitoring occurs, there is the risk of freshwater contamination, which could be exacerbated by increased tourism. However, recycling has now been significantly improved with the opening of the Niue Waste Recycling Facility.

Improved public services, facilities, and infrastructure would enhance the visitor experience. The 2019 Niue Visitor Survey found 42% of respondents reported these to be the least appealing aspect of their experience (NZTRI 2019a). For example, Niue has limited sea access due to its topography and wharf facilities. Cruise ship passengers must arrive via tender to allow the ship to moor in deeper waters, which can deter some visitors from coming ashore.

VISITOR DEMAND AND DESTINATION EXPANSION

Increasing the total spend per visitor, rather than visitor numbers, is a priority. Niue’s visitor surveys have found the total spend per visitor in Niue is lower than neighboring countries (NZTRI 2019a). This is generally attributed to the fact that many tourist activities in Niue—such as walking, swimming, and bird watching—are free of charge. The average spend per visitor is usually higher during the peak season and considerably lower over the summer months (NZTRI 2019b), which may reflect high season pricing. The Niue Tourism Office has been investigating ways to increase paid tourist activities, such as the new, locally guided astro-tours of the country’s Dark Skies.

Most tourism operators are comfortable with their current level of activity and are not interested in expansion. A 2018 survey of tourism businesses in Niue found this was mainly due to the lack of skilled worker availability and limited amenities—such as hire cars—for tourists during high season. Less than a quarter of operators wanted to see growth in tourism numbers, while 10% suggested there were already too many tourists (Jenkins 2019). Most operators indicated a

Box 5: Impact of COVID-19 on Niue's Tourism Sector

Niue's borders were effectively closed in late March 2020 to contain the spread of the coronavirus disease (COVID-19). Air New Zealand reduced its regular twice-weekly flights, and incoming passenger numbers were limited to 26 returning residents or essential workers per fortnight. In March 2021, quarantine-free travel from Niue to New Zealand opened, but quarantine-free travel from New Zealand to Niue was still not possible (Government of New Zealand n.d.). By mid-July 2021, Niue had become one of the few countries worldwide to reach herd immunity, with 97% of its population aged 16 and above vaccinated (Tokalau 2021). The high vaccination rate will allow Niue to gradually reopen its borders, possibly beginning with a travel bubble with New Zealand (Asian Development Bank [ADB] 2021a).

The loss of tourism has severely impacted Niue's economy.

In April 2020, in anticipation of missing the entire 2020 tourist season, Niue's government estimated the loss of income in the tourism sector during April–September 2020 could be between NZ\$6.4 million and NZ\$7.95 million, with a flow-on impact to government of at least another NZ\$2.6 million (Government of Niue 2020). ADB estimated Niue's financing needs for that period at \$12.9 million, or 38.4% of gross domestic product (GDP) (ADB 2020a). ADB (2021c) later determined that Niue likely experienced an economic contraction in the 2020 fiscal year (FY)^a and predicted a more severe contraction in FY2021 followed by a recovery in FY2022. However, the forecast recovery assumes the opening of borders, particularly with New Zealand, in the final quarter of 2021 (ADB 2021b).

A series of Pacific Trade Invest (PTI) surveys have reported the severe impact of COVID-19 on businesses in Niue.

64% of business operators reported a “very negative” impact in early June 2020 (PTI 2020a). By October 2020, the figure was 73% (PTI 2020b). In July 2021, 45% of businesses continued to report a “very negative” impact (PTI 2021a). A “significant decline in revenue” was reported by 67% of businesses in June 2020 (PTI 2020a), 82% in October 2020 (PTI 2020b), and 62% in July 2021 (PTI 2021a). In October 2020, 100% of Niue respondents believed the local economy had worsened, but 73% of operators surveyed were confident their business would survive the crisis (PTI 2020b). By March 2021, 38% of businesses were temporarily closed (PTI 2021b). In July 2021, 92% believed the local economy had been impacted, but 80% believed their business would survive (PTI 2021a).

Niue's economic recovery will strongly depend on the resumption of tourism. Niue has developed a tourism recovery plan, which positions the country as a safe and appealing destination. Marketing is targeted at Niue's main source markets, Australia and New Zealand, and the country aims to capture a significant share of early post-COVID

travelers. Its inclusion in any “travel bubbles” (quarantine-free travel between two or more countries) would support Niue's recovery but depends on strengthening the country's health system (ADB 2020b). In preparation for Niue's eventual reopening to tourism, the Government of New Zealand is providing NZ\$1 million for upgrades to the Scenic Matavai Hotel. The hotel will become Niue's main isolation and quarantine facility when tourism returns, in addition to being a critical part of the country's ongoing tourism infrastructure (Radio New Zealand 2021).

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Source: Pacific Private Sector Development Initiative.

^a Niue's fiscal year ends 30 June.

preference to build the shoulder season, to ensure more efficient use of capital and provide better returns and greater resilience (TRC Tourism 2018).

Niueans tend to prefer small, incremental increases in tourism development. Most private sector operators agree that accommodation consistent with Niue's positioning as a sustainable destination, and in keeping with the existing character of Alofi and the villages, is preferable (Jenkins 2019). Since most of Niue's tourism operations are locally owned, there is minimal economic leakage (i.e., how much of the tourism dollar leaves the country), and profits tend to be reinvested in the country.

ECONOMY, POLITICS, AND GOVERNMENT

Tourism data is collected by the Niue Statistics Office and relies on manual systems. However, as Niue is a single island with only two incoming flights per week, its statistics tend to be reliable and timely. Official government data is supplemented by the Niue Visitor Survey, conducted every 6 months. The main challenge in Niue's data collection processes is the heavy reliance on a single staff member and limited succession planning. Data collection could also be strengthened by a deeper understanding of environmental indicators, such as increases in water usage and environmental waste due to tourism (IDEAA Group 2020).

Foreign investment in Niue's tourism sector is limited. The Scenic Matavai Hotel is owned by the Niue Tourism Property Trust, which is funded by the governments of New Zealand and Niue. The hotel is operated by the New Zealand-based Scenic Hotel Group. Niue's smaller accommodation providers are mostly locally owned. A 2018 business survey estimated that 65% of tourism businesses are owned by Niueans, with 63% of the remainder being owned by permanent residents (NZTRI 2018).

LAND ACCESS AND DEVELOPMENT

Niue's property ownership regime impedes investment in tourism. Around 99% of Niue's land is privately owned by families under a customary land ownership system (Jenkins 2019). Many overseas-based Niueans own land but have left properties abandoned, resulting in eyesores and untapped development potential. Overseas owners can also object to the development of land, even if they have no current interests. Legislative change has been suggested to give only permanent residents of Niue the right to object to proposed changes in land use (Niue Chamber of Commerce 2015).

EMPLOYMENT AND TRAINING

Labor supply is an ongoing challenge for the private sector. Niue's small population consists of more people aged under 14 and over 65 than people in economically active age groups. Over a quarter of the total population is employed by the government (ADB 2021). A high level of outmigration to New Zealand is another contributor to Niue's limited labor supply. The age demographics and outmigration, in addition to recent growth in the tourism sector, has resulted in full employment in Niue (ADB 2021).

The Government of Niue is reviewing options to increase access to labor for local businesses. A possible solution is a seasonal worker program for tourism and hospitality workers from other Pacific islands. However, the government would prefer to fill job vacancies by attracting Niueans back to the island. It believes that importing short-term labor reduces the benefit of their employment, since many send money home and do not invest in the local economy. There are also costs associated with sponsoring workers and scant accommodation supply on the island during peak season.

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