



SAMOA

The Treasured Islands of the South Pacific



Samoa Tourism Development Plan

2009 – 2013

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This Plan is the third Component of the STA Governance and Planning Project
which was co-funded by the
Public Sector Improvement Facility and the Government of Samoa

July 2009

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List of Abbreviations

ALOS	Average Length of Stay	SPA	Samoa Ports Authority
APEC	Asia Pacific Economic Cooperation	SPTO	South Pacific Tourism Organisation
APTC	Australia Pacific Technical College	SSC	Samoa Shipping Corporation
CBS	Central Bank of Samoa	SSFA	Samoa Sports Facilities Authority
DBS	Development Bank of Samoa	STA	Samoa Tourism Authority
EIA	Environmental Impact Assessment	STE	Samoa Tourism Exchange
FAA	Federal Aviation Association	SWOT	Strengths, Weaknesses, Opportunities and Threats
FIT	Free Independent Travellers	TAG	Tourism Advisory Group
GEF	Global Environment Facility	TDA	Tourism Development Areas
GFC	Global Financial Crisis	TDP	Tourism Development Plan
HRD	Human Resource Development	TMT	Tourism Marketing Taskforce
IATA	International Air Transport Association	TTF	Tourism Task Forces
ICAO	International Civil Aviation Organisation	UK	United Kingdom
LTA	Land Transport Authority	UN	United Nations
MCIL	Ministry of Commerce, Industry & Labour	UNWTO	United Nations World Tourism Organisation
MESC	Ministry of Education, Sports & Culture	USA	United States of America
MNRE	Ministry of Natural Resources & Environment	USD	US dollar
MOF	Ministry of Finance	US	United States
MOR	Ministry of Revenue	VFR	Visiting Friends and Relatives
MPA	Marine Protected Areas	WTO	World Trade Organisation
MWCSD	Ministry of Women, Community & Social Development		
MWTI	Ministry of Works Transport & Infrastructure		
NGO	Non Government Organisation		
NUS	National University of Samoa		
NZ	New Zealand		
OAG	Office of the Attorney General		
PADI	Professional Association of Diving Instructors		
PARSO	Pacific Aviation Security Office		
PATA	Pacific Asia Travel Association		
PSSF	Private Sector Support Facility		
PUMA	Planning & Urban Management Agency		
SAA	Samoa Airport Authority		
SARS	Severe Acute Respiratory Syndrome		
SAT	Samoan Tala		
SBEC	Small Business Enterprise Centre		
SBS	Samoa Bureau of Statistics		
SHA	Samoa Hotels Association		
SLC	Samoa Land Corporation		
SME	Small & Medium Sized Enterprises		



1. Foreword

In a dynamic global environment, the Samoa Tourism Sector needs to adopt a strategic approach to preserving existing markets, attracting new market segments and developing new products.

This Tourism Development Plan lays the foundation for the coordinated and sustainable development of tourism for Samoa. It gives industry, government and all stakeholders the vision, goals, targets and actions to meet the challenges and opportunities facing the sector over the next 5 years. By 2013, Samoa will have a strong, sustainable and dynamic sector that:

- Is recognised for delivering fulfilling and unique life enhancing experiences.
- Celebrates and preserves our people and our unique cultural and natural heritage.
- Is well positioned in carefully selected markets and market segments.
- Is responsive to all visitors' needs and changing traveller patterns.
- Is delivering optimum outcomes throughout all Samoa and to all stakeholders.
- Is contributing significantly to our long term economic, environmental, cultural and social development and sustainability with equitable distribution of benefits throughout all of Samoa.
- Is united by a collaborative culture and mutual respect across our community, industry and Government sectors.
- Is embraced and respected by all Samoans as proud and willing ambassadors.

It is critical that Samoa has a tourism sector that is economically, environmentally, culturally and socially sustainable, a significant driver of economic growth and a creator of individual and community wealth and prosperity. Through this plan, industry, government and all stakeholders together will build a better Samoa, a better place to live and grow, to visit, to work and to play.

This development plan is the product of a strong partnership between the Government of Samoa and the tourism industry. The contribution of many tourism operators, government representatives and other stakeholders has been critical to the development of the plan.

Through this Tourism Development Plan, the Government of Samoa is committing to work in innovative ways with the tourism industry to address the industry development and marketing needs over the next five years and beyond.

Primary emphasis in the past has focused on building awareness of Samoa as a tourism destination in our target markets. Whilst this continues to be critical, we also need a more finely tuned approach. Changing market circumstances, consumer travel patterns and intense competition from other destinations particularly in the South Pacific, demand a more succinct, strategic focus with greater emphasis on actions and outcomes.

Put simply, we need to think and act strategically by directing our activities at those markets, consumers, investment and product development opportunities which can deliver the best results for Samoa. We are fortunate to be in our relatively younger years of international tourism development and to have the opportunity of determining the style and character of tourism that is preferable for Samoa.

Consistent with the key themes that emerged from stakeholder consultation, the focus of the plan is on 3 key operating themes underpinned by 5 key enabling themes as follow:

Operating themes:

- Destination promotion and marketing
- Product, service and infrastructure development
- Resource management

Enabling themes:

- Access

- Land, business and investment
- Tourism capacity building and workforce development
- Research, planning and impact management
- Institutions and industry framework

To focus government and industry action, clear goals and realistically achievable targets have been established for growing tourism for Samoa.

The challenge over the next 5 years is to:

- Grow visitor arrivals by 40% to 170,000
- Grow total visitor room nights to exceed 1 million.

This plan establishes the framework for ongoing development of sophisticated research capacities which will enable continuous monitoring and evaluation of performance in achieving other key goals of:

- Increasing average length of stay
- Increasing yield and average spend and
- Increasing repeat visitation

A more strategically focused plan requires greater co-ordination and strengthened partnerships between Government, tourism service providers and other key stakeholders. I strongly urge the tourism industry to take up this challenge and support the Samoa Tourism Authority in the implementation of this Plan.

God Bless,



Misa Telefoni
Deputy Prime Minister & Minister of Tourism

2. Executive Summary

2.1. Introduction

Tourism in Samoa has grown significantly over the past ten years both in terms of visitation and visitor spend. With the recent downturns in the agriculture and fisheries industries, tourism has become an exceptionally important sector for future economic development of Samoa and particularly in generating employment and foreign exchange earnings.

For tourism to prosper for Samoa, it is critical that Samoa is as best equipped as possible to effectively compete in what has become in world terms, a highly sophisticated and dynamic environment and an exceptionally and aggressive competitive marketplace.

Throughout the world, tourism is undergoing significant changes and challenges not the least being the yet to be determined fallout of the Global Financial Crisis (GFC), the rationalisation of the aviation industry and advent of the low cost carriers, increasing point to point services, the aggressive competitiveness of all competing destinations and particularly those in the South Pacific, world terrorism, climate change and generational change. Consumers are becoming increasingly discerning and are looking for highly differentiated experiences. They are also looking for and demanding higher quality and better service. Samoa must comprehensively understand and respond to these challenges if tourism is to succeed for Samoa.

This Tourism Development Plan seeks to provide the path that will enable best development and growth of supply capacities that are required to best meet and exceed the needs and expectations of consumer demand.

The plan is a strategic document, a practical blueprint giving the direction and focus which stakeholders need as a basis for decision-making

and the development of more detailed individual and/or joint strategies and action programs.

The primary aims of this Tourism Development Plan are:

- To establish and articulate common objectives and directions for the sector, industry, the community and government.
- To develop strategies designed to achieve the common objectives and to determine organisational roles.
- To provide a foundation for determination of priorities for strategic implementation.
- To provide a foundation for determination of appropriate methods of monitoring progress and performance.
- To provide an agreed framework for the long term sustainable development of tourism for Samoa.

The plan revolves around eight key themes as follows:

Operating themes:

- Destination promotion and marketing
- Product, service and infrastructure development
- Resource Management

Underpinned by Enabling themes:

- Access
- Land, business and investment
- Tourism capacity building and workforce development
- Research, planning and impact management
- Institutions and industry framework

2.2. Tourism performance

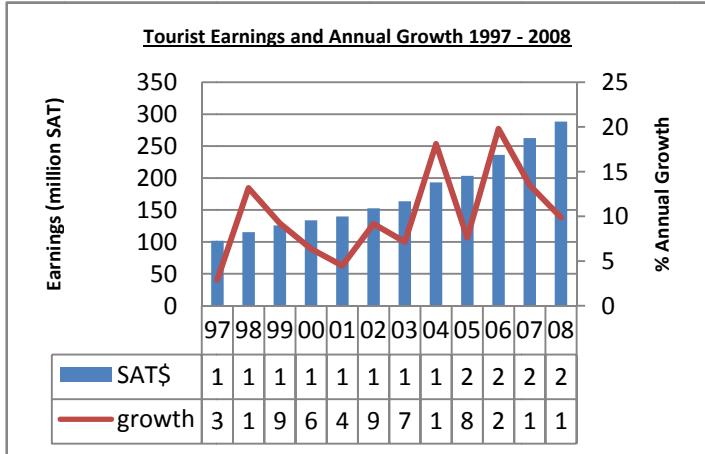
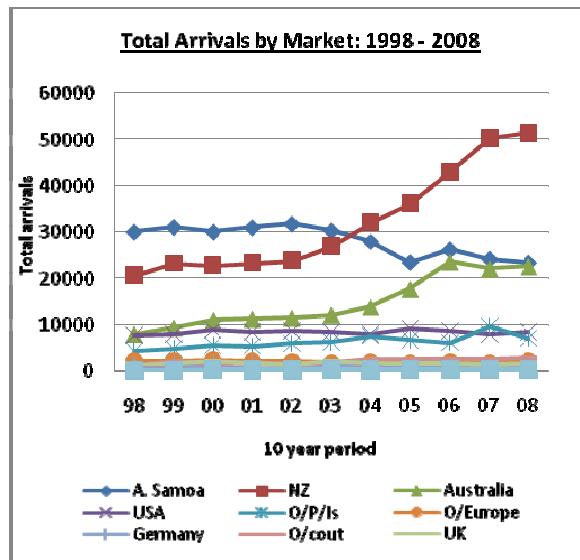
Total visitor arrivals for the 2008 year end were 122,163.

The overall surge in visitor numbers and visitor earnings has been significant over the last ten years. Visitation from core markets of New Zealand and

Australia in particular, has more than doubled. Arrivals from American Samoa declined by 22% but this trend is showing signs of stabilising and should be reversed in the short-term with increased frequency, capacity, planned marketing activities and the ease with which entry permits to Samoa can now be obtained.

Some secondary long haul markets, especially UK and Europe have also declined due to reasons including fears of terrorism, SARS, political unrest, climate change and aircraft carbon emission issues, high fuel prices which resulted in high fares and the like. There continues however, to be reasonably strong growth from the North American market.

Tourism arrivals and earnings performance for Samoa over the ten year period 1998 to 2008 is demonstrated in the following graphs:



A snapshot of total arrivals & tourist earnings:

Tourist Arrivals:

2005	101,807
2006	115,882 (inc 18.8%)
2007	122,352 (inc 5.5%)
2008	122,163 (dec 0.2%)

Tourist Earnings (Gross):

2005	ST\$ 203.5 million
2006	ST\$ 236.3 million
2007	ST\$ 262.5 million
2008	ST\$ 288.4 million

*Data based on June NR IVS/NVS data

2.3. Tourism overview

Tourism has been a part of the Samoan economy for a long time, but it has been constrained by relative destination immaturity and very low awareness or visibility of the destination in core and emerging markets. Development has in the main, been in resorts and hotels but most are relatively small and 'boutique' in character. There is only a very limited number of larger resorts.

Limitations of access and aviation connectivity, resources and limited competitiveness of investment attraction incentives have also contributed to constraining further development.

Nevertheless tourism market interest in Samoa is increasing particularly given worldwide trends towards ecotourism destinations, happily coinciding with the increasing level and competitiveness of air services, servicing the destination.

Samoa is a postcard of natural beauty offering very diverse and different environments and activities for visitors to explore and undertake. Numerous opportunities exist for additional activities to cater for the growing holiday market, and Samoa will need to ensure that these eventuate in order to best service consumer needs.

Samoa has a strong Visiting Friends and Relatives (VFR) market sector that contributes significantly to the economy through remittances. Trends in traveller patterns for this particular sector have seen expatriate Samoans increasingly becoming consumers of mainstream tourism products and services.

Recent years have also seen some significant growth in business and special events market segments given the country's increasing success in hosting meetings and conferences and events. Continued growth in these market segments is

envisioned with Government's plans to build a new Convention Centre in Apia.

The development of sports in the country as well as the availability of quality sports facilities offer significant opportunities for promotion of sports tourism and attracting training camps to Samoa.

Government's emphasis on improving the education sector through establishment of new international institutions also presents additional tourism niche market opportunities for Samoa.

The development of special interest market segments will be explored for further growth in the sector.

2.4. Our vision for tourism in Samoa

The future of tourism in Samoa will be strategically focused on promoting and delivering the truly unique and distinctive "**Samoan Experience**".

The Samoan Experience is underpinned by strong themes of pristine nature, soft adventure, cultural appreciation, personal rejuvenation, indulgence and self discovery, safety and security whilst also enjoying truly warm and genuine community welcome and exceptional and world renowned Samoan hospitality.

The future of Tourism in Samoa will be as a strong, sustainable and dynamic sector that is:

- Recognised for delivering fulfilling and uniquely differentiated life enhancing experiences to all visitors.
- Celebrating, promoting, protecting and preserving our people and our unique cultural and natural heritage.
- Clearly defined and positioned in core target markets and market segments, selected for best effect from Samoa's distinct competitive advantages.
- Proactively responsive to all visitor needs, and changing traveller patterns, and constantly striving for continual improvement.

- Continually well researched and informed and strategically focused for optimum outcomes for all stakeholders.
- Contributing significantly to our long term economic, environmental, cultural and social development and sustainability with equitable distribution of benefits throughout all of Samoa.
- United by a collaborative culture and mutual respect across our community, industry and all sectors within Government.
- Embraced and respected by all Samoans.

2.5. Rationale underpinning the vision

Fundamentally, Samoa faces some significant competitive challenges in growing tourism. It is comparatively more remote, difficult to access and therefore frequently, a more expensive destination.

There has also been a reasonably widely held perception in markets that all South Pacific island holidays are roughly equal in terms of beaches and sunshine (sun, sea, surf and sand) particularly for families. It has frequently been necessary to respond to this market perception by competing on the basis of *lowest cost* with resulting loss of yield. The risk in this strategy is one of *profitless volume*.

Importantly, whilst Samoa is decidedly seeking significantly increased volumes of visitors over levels currently being achieved, Samoa is not seeking what in world terms can be regarded as mass tourism. Indeed, on the contrary, there is concern to ensure that the quality of life and the Fa'a-Samoa are not in any way prejudiced or imperilled by possible downside risks of *mass tourism*.

On this basis, it is certainly not critical that Samoa compete exclusively on a *price led* basis. Volume business is important and is critically necessary to ensure the commercial viability and therefore continuity of air services and access.

Samoa has the enviable latitude to be discerning in market selection, to differentiate and in so doing, to target and capture primarily the type of tourism that best benefits Samoa.

To compete effectively otherwise than exclusively on cost, requires competition on the basis of value. In essence, this requires clear differentiation from cheaper options. Emphasis must be upon unique competitive advantages and added value to be derived by the consumer, answer the question *Why should I pay more?*

It is more than simply meeting a visitor's logistical needs such as accommodation and hospitality, attractions, tours and entertainment. It is more than pristine beaches, lush rainforests, and exquisite environment. (After all, as special as these are, there are nevertheless other destinations which are able to make similar claims). It is more than experiences such as exceptional surfing or being warmly and genuinely welcomed into, feeling safe and secure and more than just experiencing the exceptional *tastes and colours* of Samoa.

It is about all of this, plus it is about appealing to and satisfying the psycho-graphical inner and emotional needs of the potential visitor. It is about delivering improvement to life, rejuvenation, reinvigoration, self discovery, reconnecting relationships, families and what it is that is important, finding personal happiness and contentment.

It is something that is entirely and genuinely authentic and unique, and cannot be found anywhere else in the world. It is this collectiveness that makes it the unique Samoan Experience.

2.6. Our destination imagery and brand

Key images, themes and emotions underpinning the Samoan Experience are Samoa's iconic natural attractions ranging from pristine beaches

to cascading waterfalls, cleanliness, community pride in the living environment and more.

Samoa's built environment in terms of its distinctive architecture, the uncluttered and unhurried environment and the sense of a completely relaxed and relaxing environment are also part and parcel of the Samoan Experience.

The Samoan people are amongst the friendliest in the world and their welcoming nature, strong family values, living culture and Faa-Samoa distinguishes Samoa from any other country in the world.

With an abundance of delicious fresh seafood, tropical fruits and vegetables, and traditional cooking techniques, the Samoan cuisine is an experience that is uniquely Samoan.

Special interest activities such as Samoan cricket, fautasi racing and other traditional games also differentiate Samoa from its competitors.

The sense of comfort, safety and security, excitement and contentment are all encompassing elements of the Samoan Experience which is Samoa's unique competitive advantage.

All of this imagery will be consolidated into the branding study that this plan proposes.

2.7. Target markets

The core markets for Samoa continue to be New Zealand, Australia and American Samoa. North America, the United Kingdom and Europe will remain secondary markets while China and Japan can be considered as emerging markets to capitalise on. Destination awareness and promotion activities should therefore be strategically focussed towards these markets and defined demographic and psychographic segments within these markets.

2.8. Forecast performance

An average annual growth rate of 7% in visitor arrivals is forecast over the next five years. This will in total generate approximately 170,000 visitors and an overall increase in total room nights estimated to grow to in excess of one million.

2.9. Key themes and focus areas

Each of the eight key themes of the plan contains clearly articulated goals, key areas of focus, key strategies and key actions together with target timeframes and allocated responsibilities to ensure the effective promotion and development of the sector in the next five years and beyond.

2.10. Destination promotion and marketing

Key Areas of Focus are:

- To maintain, protect and grow visitation from existing primary markets.
- To build and strengthen distribution channels and facilitate commercial access to Samoa's tourism product and vice versa.
- To build stability through diversified, new and emerging markets and segments.
- To engender strong word of mouth referral recommendation.
- To optimise a web based marketing strategy.
- To optimise industry marketing and promotional efforts by providing leadership, strategic coordination and guidance to industry members and other related promotional agencies.
- To maximise leverage opportunities and benefits by working in partnership with Samoa Hotels Association and other industry bodies.

2.11. Product, service and infrastructural development

Key Areas of Focus are:

- Identifying tourism product, services and infrastructure needs required to meet

forecast tourism demand and satisfaction expectations, and uplifting capacities and diversity of supply.

- Uplifting service and training standards.
- Providing an accreditation regime applying a system of standards and representation in the market that will ensure adherence to “truth in advertising” and enable consumers to have clarity of expectation, and to be satisfied in the service and product they receive as well as delivery of expected services.
- To ensure appropriate investment, building and environmental regulatory regimes within all relevant Government agencies, industry and communities to ensure best presentation of both the built and natural environments. of Samoa.
- To continue to focus development throughout Samoa on the basis of *Tourism Development Areas*.

2.12. Resource management

Key Areas of Focus are:

- To adopt, implement, establish monitoring systems and processes and report against Samoa’s sustainable tourism indicators, interpret results and determine appropriate strategic responses.
- To ensure ongoing protection and management of key protected and conservation areas, and natural scenic and landscape sites.
- To continue strengthening of community and public awareness of proper planning of developments with tighter development controls.
- To provide continuing assistance in the development of attractive, safe and environmentally sound income generating nature based tourism products. This can be achieved through training, access to assistance and support and advisory services.
- To assess tourism opportunities in Marine Protected Areas for further development

and identify mitigation strategies for particular tourism pressure points on coral reefs and the marine environment.

- To increase operator awareness of waste management and pollution control on tourist sites.
- To strongly encourage and promote the use of effective water-saving measures by all existing and new hotel developments.
- To strengthen community tourism awareness programs and encourage tourist education programs on the potential impacts of tourism on the Samoan culture.

2.13. Access

Key Areas of Focus are:

- To build partnerships with airline operators.
- To preserve and build enhanced connectivity to all core, secondary and emerging markets.
- To encourage air and land content packages.
- To investigate opportunities to attract charter series.
- To build better regional inter island connectivity.
- To ensure airport and port facilities meet international facility and safety standards.
- To build greater domestic connectivity.
- To build partnerships with cruise ship operators.
- To review and assess Government taxes, charges and imposts in the context of the competitive environment.

2.14. Capacity building and workforce development

Key Areas of Focus are:

- To improve skill levels.
- To improve the coordination of training between stakeholders including government, industry, communities and training providers.
- To ensure that training and education are responsive to the needs of the industry.

- To create greater awareness of the tourism sector at all levels including villages, resource owners and youth on the benefits of tourism.
- To improve the quality of tourism training and increase opportunities for accessing training on a full and part time basis.
- To upgrade the capacity of existing tourism and hospitality training institutions.
- To maintain communications systems to keep industry members, Government departments and agencies and the community fully informed about training and business improvement opportunities.

2.15. Land, business and investment

Key Areas of Focus are:

- To identify infrastructure needs and new product opportunities, source appropriate Government funds and procure investors and investment capital.
- To develop a structured investment attraction plan and to facilitate investment growth in the sector by application of competitive investment incentive programs.

2.16. Research, planning and impact management

Key Areas of Focus are:

- To constantly ascertain and monitor research data needs.
- To identify and establish partnering arrangements with relevant data collection and collation sources, government and other research facilities.
- To have input into and draw upon research studies and reports commissioned by or available to SPTO, PATA and other relevant and cooperative bodies.
- To monitor and report against Samoa's sustainable tourism indicators.

2.17. Institutions and industry frameworks

Key Areas of Focus are:

- To establish an integrated structural framework which provides formal communication channels between and unites all stakeholders within the sector.
- To understand and interpret the views and perspective of all relevant stakeholders in the sector and to effectively and efficiently respond.
- To successfully access and effectively and efficiently utilise donor funds in order to assist in the implementation of this development plan.

2.18. Risk management

Key risks which may potentially impact on the development of the sector and the successful implementation of the plan in the next five years have been clearly identified and are categorised as follows:

- Risks from the physical environment (natural, climatic, epidemic).
- Risks from the human and institutional environment outside the tourism sector.
- Risks from the tourism sector and related commercial sectors.
- Risks from the individual traveler (personal risks).

Summary evaluation and proposed strategic responses have been developed and where appropriate or desirable, responses will be coordinated with relevant agencies whilst tourism specific responses in particular have been identified in this Plan.

3. Introduction

Irrespective of the complexities at a detailed level, Tourism as a sector has two simple core aspects, demand and supply.

Success in tourism requires that both sides of the demand and supply equation are as comprehensively satisfied as they can be. Anything less means failure to optimise existing circumstances.

Destinations cannot control demand. They can, and do endeavour to exert significant influence and drive demand to the destination, but at the end of the day the market will make the final decision.

Destinations can however be far more definitive when it comes to driving supply capacities in the direction they need to be driven, in order to give greatest satisfaction to markets. In so doing it can be an integral component to the drive to influence and direct demand.

This Tourism Development Plan seeks to provide the path that will enable best development and growth of supply capacities that are required to best meet and exceed the needs and expectations of consumer demand.

The Plan is a strategic document, a practical blueprint giving the direction and focus stakeholders need as basis for decision-making and the development of more detailed individual, and/or joint strategies and action plans.

The primary aims of this tourism development plan are:

- To establish and articulate common objectives and directions for the sector, industry, the community and government.
- To develop strategies designed to achieve the common objectives and to determine organisational roles.

- To provide a foundation for determination of priorities for strategic implementation.
- To provide a foundation for determination of appropriate methods of monitoring progress and performance.
- To provide an agreed framework for the long term sustainable development of tourism for Samoa.

4. Growing Tourism for Samoa

4.1. Tourism defined

Tourism has been defined in a number of different ways to suit different purposes. The following is a broadly accepted definition:

Tourism is the temporary short term movement of people to destinations outside the places where they would normally live and work, together with their activities and experiences during those trips which include pleasure, entertainment, culture, business, conferences, visiting friends and relatives, adventure, shopping, dining, sports, education, health, challenge and self development, or a combination of these reasons.

Irrespective of the way tourism is formally defined, it is first and foremost a 'people industry' involving the development and supply of a range of facilities, services and experiences to meet the needs, aspirations and expectations of visitors. In simplistic terms, tourists have needs for:

- Transportation
- Accommodation
- Sustenance, food and beverages
- Entertainment and interpretation
- Education, cultural and new experiences
- Exposure to Samoan hospitality
- Support services including personal welfare, health and shopping.

Tourism is complex and diverse, involving many different forms of business enterprises each forming an integral part of a much larger services industry. Hotels, motels, restaurants, bus services, transport hire and the like not only pay wages but also buy goods and engage other services locally. The benefits from this expenditure flow to everyone in the community.

The broader sector comprises mainstream tourism operators, businesses not directly

involved in tourism, community groups, residents and government. By working together, destinations have the capacity to attract visitors, satisfy their leisure needs and expectations and generate economic and other benefits for the whole community.

Competition for tourism markets is fierce on the world stage and particularly within the South Pacific. Markets are increasingly demanding, discerning, and value-conscious. With the increasing pace of the modern world, people are increasingly time poor, which means that they are aiming to maximise the benefits they are seeking during their leisure time.

In the highly competitive industry of today, effective and efficient utilisation of limited resources is imperative. The Tourism Development Plan provides the means by which these efficiencies can be achieved. It is the instrument of leadership that defines the vision and strategy for long term and sustainable tourism growth which provides the platform for coordination of *all* of Government and the tourism industry.

4.2. The benefits of tourism

The benefits from tourism nationally and for individual local communities go well beyond the direct economic impacts:

4.2.1. Multiplier effect

Visitors to an area purchase goods and services. This spending injects new money into the local economy. A percentage of each new tourism receipt is spent in the community by the recipient and this is then spent and re-spent creating a "multiplier effect".

When more tourist moneys enter a local economy and larger percentages are retained locally, the economic benefit is greater.

4.2.2. Employment opportunities

Tourism is a labour intensive industry and creates many job opportunities especially for young people who are then encouraged to stay in local communities. In the Tourism, Hospitality and Recreation Industries alone, there are more than 50 categories of employment and approximately 200 occupations.

4.2.3. Diversification

Tourism is an export industry and as such a major source of foreign exchange earnings. It is also an industry that provides diversification which strengthens the local economy by making it less reliant on a single traditional base such as agriculture and fishing.

4.2.4. Improved facilities for residents

Growth in tourism results in new and expanded infrastructure, services and facilities which benefit residents, particularly in communities where these developments would otherwise not be viable. Tourism also generates improved financial viability for community owned facilities such as clubs and sporting venues. In these ways, tourism creates tangible benefits including employment opportunities for the community.

4.2.5. Opportunities for business

Tourism creates opportunities to establish new products, facilities and services and expand existing businesses that would not otherwise be sustainable based on the resident population alone.

4.2.6. Preservation of the environment, culture and heritage

Tourism highlights the need for proper management. Through effective policy, planning and research, tourism can ensure that the environment, heritage, culture and values of an area are preserved. Interpretation of nature based and heritage product is an important educational vehicle for promoting a better understanding of environment and heritage values to all visitors.

4.2.7. Improved transport services

Tourism can stimulate the establishment of new and improved transport services to and within a destination.

4.2.8. Educational opportunities

Tourism provides expanded opportunities for residents through the introduction of education and specialised training courses.

4.2.9. A broader social outlook

Tourism provides the opportunity for residents to interact with other people and cultures to bring new ideas into the community.

4.3. Generating community support and involvement

Some communities may be wary of proposed tourism development. Concerns are often based on a lack of information and understanding and can lead to:

- Fears of being overrun by mass tourism.
- Resentment of ‘outsiders’ and the perception that the community will be exploited.
- Concern that the character of the community will change and quality of life will be eroded.

Open consultation and communication will lessen the likelihood of conflict arising between residents and the tourism sector. Local residents need to know how tourism affects their lives – the benefits, quality of life factors and the direction being taken to develop the industry. Community education, information forums and opportunities to transfer a greater understanding of the industry’s work to community members are essential in tourism development.

The supportive attitude of local communities is not only necessary for development but it is also an essential element in the promotion of a destination.

One of the most effective methods of tourism marketing is positive word-of-mouth support from local residents. The power of residents promoting their area to friends, relatives and business associates can and should be exceptionally powerful.

To encourage community support and involvement, there is a requirement to:

- Recognise that the community comprises of many different groups and individuals who will be motivated for different reasons.

- Involve young people, utilise their energy, enthusiasm and ideas.
- Involve senior citizens, their experience, talent and knowledge of the local area and its history can be a great asset.
- Create ownership of the local tourism industry by determining ways people can become involved.
- Focus on tourism activities and projects that are realistic, achievable and visible.

5. Profile of Samoa

5.1. About Samoa

5.1.1. Geography and people

Samoa consists of the two large islands of Upolu and Savai'i and eight small islets located about halfway between Hawaii and New Zealand in the Polynesian region of the South Pacific. The main island of Upolu is home to nearly three quarters of Samoa's population and its capital city of Apia. The climate is tropical with a rainy season from November to April.



5.1.2. Culture

The Fa'a-Samoa or traditional Samoan way remains a strong force in Samoan life and politics. Despite centuries of European influence, Samoa maintains its historical customs, social systems and language, which is believed to be the oldest form of Polynesian speech still in existence. Only the Maoris of New Zealand outnumber the Samoans among Polynesian groups.

Fa'a-Samoa has three key elements to it. The matai (chiefs), aiga, the extended family and the church.

Matais are the heads of the extended family unit and their role is very complex covering family, civic and political duties in the village.

There are 365 nu'u's or villages found throughout the islands with a total of in excess of 18,000 matais.

The aiga, or extended family, is made up of parents, brothers and sisters, children, grandparents, cousins, nephews and nieces living together within the village. When family members marry partners in other villages, the in-laws too become part of the extended family unit and share in the work and labour to develop the family and also participate and organize activities. Whether in times of happiness or sadness, all, come together to share and help each other. It is ones duty as a Samoan to be of service to our aiga for life.

Christianity has been one of the few western influences that has been accepted into the Fa'a-Samoa. The motto on Samoa's crest reads, Fa'avae I Le Atua Samoa – Samoa is founded on God, and found in every village are churches of various denominations. Samoans are devout Christians and Sunday is a day of

worship and spending time with family and no physical works are undertaken.

The Fa'a-Samoa also has a strong focus on hospitality and welcoming visitors.

5.1.3. History

Samoan belief is that Samoa is the '*Sacred Centre*' of Polynesia (Sa meaning Sacred, Moa meaning Centre).

Migrants from Southeast Asia arrived in the Samoan islands more than 2,000 years ago and from there settled the rest of Polynesia further to the east. Contact with Europeans began in the early 1700s but did not intensify until the arrival of English missionaries and traders in the 1830s.

At the turn of the 20th century, the Samoan islands were split into two sections. The eastern islands became territories of the United States in 1904 and today are known as American Samoa. The western islands became known as Western Samoa (now the Independent State of Samoa), passing from German control to New Zealand in 1914.

New Zealand administered Western Samoa under the auspices of the League of Nations and then as a UN trusteeship until independence in 1962. Western Samoa was the first Pacific Island country to gain its independence.

In July 1997 the Constitution was amended to change the country's name from Western Samoa back to the original name of Samoa (as recognised by the United Nations).

5.1.4. Government

The 1960 Constitution, which formally came into force with independence, is based on the British Westminster parliamentary system, modified to take account of Samoan customs. The country has enjoyed strong political stability demonstrated by the fact that Malietoa Tanumafili II held the post of Head of State for 45 years until his passing in May 2007. His successor, Tuiatua Tupua Tamasese Efi, was selected by the Fono for a 5-year term.

The judicial system is based on English common law and local customs. The Supreme Court is the court of highest jurisdiction. Its Chief Justice is appointed by the Head of State upon the recommendation of the Prime Minister.

5.2 Overview of tourism in Samoa

5.2.1 Destination appeal

5.2.1.1 Leisure tourism:

Samoa is a postcard of natural beauty consisting of ten islands, each offering very distinct and different environments to explore.

From the rainforest covered rugged volcanic mountain peaks of the two main islands to the vast valleys leading down to a coastline ringed with a necklace of white sandy beaches.

Within these lush green fertile valleys, grow banyan trees towering above the rainforest canopy which is full of tropical blooms and numerous varieties of vegetation.

Cascading waterfalls dropping into rivers that cut jagged lines through the valley floor as they make their way to the ocean. The coastline is a wonder in itself, with sparkling white sand beaches, in some places stretching for miles, and here and there are walls of sheer cliffs that drop straight into the Pacific.

And beyond the beaches out into the blue lagoons are scattered the rest of the islands that make up the Samoa archipelago, some inhabited, others with only natures wildlife, protected by the fringing coral reef that keep the powerful force of the Pacific Ocean at bay.

In Samoan culture, food is a social event that brings together family and friends to share what bountiful wonders nature has provided. As the sun rises in the east, young men are paddling their canoes out in the lagoon to catch fish. Others have gone into the plantations to cultivate and harvest what is needed for the daily meals.

The bounty of the ocean provides crayfish, snapper, masimasi, octopus, tuna and more, caught that morning and served that evening.

The plantations of bananas, taro, tropical fruits and vegetables picked that day add to the freshness of the meals.

And amongst all this natural bounty, beauty and picturesque valleys and coastline can be found nu'u's or villages with their churches, meeting houses and open fales or homes encircling the malae or village green. Home to people proud of their Fa'a Samoa - cultural heritage, that lives along side these natural wonders. For it's the people, culture and nature that give life to these islands.

Hire cars are readily available and there are a number of good quality tour companies that will enable visitors to extensively explore both the main islands of Samoa and to enjoy the multitude of beaches, lakes, swimming pools, waterfalls, rainforests and other spectacular natural attractions, as well as the historic and cultural man-made attractions like the Robert Louis Stevenson Museum.

Samoa tourism operators are small in number but diverse in ranges of experience. Readily available and popular activities include:

Structured Leisure Activities	
<ul style="list-style-type: none">• Art and crafts and galleries• Archery• Beach activities• Biking• Caving• Canoeing• Cruising (day, sunset, and live-aboard)• Cultural shows• Diving• Fitness massage and beauty treatments• Game Fishing• Golf• Hiking• Hockey• Jet skis and waterskiing• Kayaking	<ul style="list-style-type: none">• Kirikiti (Samoan cricket)• Kite boarding• Lawn bowling• Netball• Paopao (Samoan outrigger canoeing)• Rugby• Sailing• Snorkeling• Soccer• Spa treatments• Squash• Surfing• Swimming• Tennis• Volleyball• Yoga

5.2.1.1 Visiting friends and relatives

Samoa has a strong heritage of its people taking up residences overseas but retaining strong family and national bonds to the homeland. This is reflected in the continuing history of foreign exchange remittances received in Samoa, and by the strong visitation of people visiting friends and relatives, which continues to transcend generational change. Expatriate Samoans continue to be a major source of visitation and are increasingly becoming consumers of mainstream tourism products such as hotel accommodation, restaurants, activities and attractions.

5.2.1.2 Business and events tourism

Samoa has seen some growth in recent years of business and special events opportunities. Predominantly this has flowed from rising popularity of the country in attracting regional and international meetings. In part, this growth has been escalated by virtue of the move to Samoa of a number of business meetings previously scheduled but disrupted by political upheavals in other South Pacific destinations.

A niche market exists with reasonably significant business generated from Aid agency funded consultants, who tend to be relatively long stay although not particularly high yield in industry segments beyond accommodation.

Technical trades people, sales representatives and other business travelers often prefer to actually visit customers in Samoa, unlike other destinations in the region where they prefer to work instead by electronic and other remote means.

Reasonably significant business is also generated from relatively frequent regional Church meetings and conferences.

Increasing capacities in regard to business tourism with plans to build a new convention centre in Apia will provide greater appeal to this substantial market segment.

5.2.1.3 Sports tourism

The past years have proven Samoa's popularity among overseas sporting clubs and teams. This coupled with the establishment of the new Samoa Sports Facilities

Authority to manage the facilities used in the 2007 South Pacific Games has established the vehicle for which Samoa can promote Sports Tourism in order to attract sporting tournaments and trainings. This will assist in driving better utilisation of the current surplus of accommodation properties that have been established in Apia.

5.2.1.4 Educational tourism

Although not in the past considered as a key target market segment, and not yet producing high numbers, educational tourism is now becoming structured and sufficiently established to justify increasing strategic focus as a segment in its own right. Key points of market entry are:

- The newly established APTC hospitality training facilities which is already hosting numbers of students from throughout the South Pacific region
- The National University of Samoa
- The University of the South Pacific
- Oceania University of Medicine
- The hospitals which are hosting medical degree students during their practical term placements and
- Other private sector educational institutions.

There is greater strategic merit in educational tourism than simply the direct visitor spend derived throughout the term of the placement. Frequently, there are attaching benefits including:

- Incremental visitation from student family and friends
- Possibility of development of long term business and trading and knowledge sharing relationships
- Likelihood of repeat visitation which might span a period of many years and
- Strong word of mouth referral.

5.2.1.5 Special interest tourism

Samoa has become established within (particularly the Australian and New Zealand) surfing communities as an almost *iconic* surfing destination. Not for learners, reef surfing in Samoa is now amongst a serious surfer's aspirations. Capacities in the segment have

grown and become relatively sophisticated in the market. Operators are based in both Upolu and Savai'i.

Although still very much in the formative stages, opportunities are growing, and potential exists, for special interest market segments including:

- International school tours
- Church groups
- Special purpose professional, scientific and academic visitors
- Photographers
- Speleologists and cavers
- Volcanologists
- Archaeologists
- Historians
- Geologists
- Marine biologists
- Botanists
- Ornithologists and bird watchers
- Entomologists and others

Planned and structured future research, data collection and collation, will include focus on developing capacity to identify and monitor trends in tourism visitation by area of interest in greater detail than is currently available.

5.2.2 Industry sector background

Tourism has been a part of the Samoan economy for a long time. It is now assuming a far greater national prominence in Samoa and is being further actively developed as a key economic sector. Recent times have seen the addition and planning of tourism infrastructure projects previously lacking and significant movements and trends in markets and visitation patterns.

Key matters are:

Relative destination immaturity:

Tourism in Samoa can still be regarded as being in its infancy. There remain some significant fundamental issues in order to ensure the Samoan industry is in a position to adequately and appropriately respond to, sustain existing and forecast tourism demands and to

take advantage of the opportunities presented. Key issues are:

- Relatively low visibility of the destination in core and emerging markets.
- Most resorts and hotels are relatively small and 'boutique' in character. There are only a limited number of larger resorts and hotels. This fact has meant diminished competitiveness particularly with the international wholesaler distribution systems who are attracted to the higher margins from volume business.
- Historically, limited size of promotional budget allocation of the Samoa Tourism Authority, coupled with relatively limited size of collective industry promotional funds.
- Limited shopping options and limited local flavour.
- Historical lack of industry cohesiveness.
- Lack of consistent imagery conveyed to markets.
- Virtual absence of credible research data or monitoring facilities.
- Limited range and number of structured attractions and activities.

Tyranny of distance, and limitations of access and connectivity:

Tourism to Samoa has historically suffered competitively to other more established South Pacific destinations from greater comparative remoteness, increased travel time and relatively limited direct air access, connectivity and frequencies.

Limited competitiveness of investment attraction incentives:

Growth of tourism as a sector requires investment of both capital and expertise, both of which have been limited in availability from purely domestic sources in Samoa. It is therefore necessary to look further afield to foreign sources of investment where there are also other benefits of synergy, particularly given the likelihood that those investors will also bring well established channels and distribution systems to markets.

As Samoa must compete to attract tourists over, so too must it compete to attract investors. Over a number of

years, Samoa has maintained a suite of investment incentives as enticements to possible investors. However in the main, they have proven to be somewhat cumbersome and less appealing than those offered by other competing South Pacific Island nations.

Limited adequacy of product supply and quality:

Although recent years have seen an uplift in accommodation product supply in some areas, significant product supply and quality issues remain:

- There is a significant imbalance of volume and capacity of developed product supply (accommodation, attractions, and support facilities) to cater for potential visitation demand.
- There is a significant imbalance of product supply across the various districts within Samoa.
- There are some seasonal variations due to climate differences between wet and dry seasons and Christmas period surge in VFR visits.

Limited resources:

Key current and future challenges include:

- Comparative to other competing destinations within the South Pacific and on the world stage, Samoa is significantly disadvantaged due to relatively limited funding available from Government. There is very limited capacity for increase in industry spend from the relatively small number and generally small size of the more mature and newer local industry operators.
- Limited availability and difficulties of retention of skills and competencies and other critical support resources.
- Increasing industry demands and expectations.

Current and anticipated uplift in market demand:

In spite of the above limitations, tourism market interest in Samoa is increasing. Contributing factors are:

- Increased Government focus towards Tourism as a key sector in the economic development of Samoa, and a significant increased budget allocation to the STA, which has enabled in-market representation and increased promotional

and marketing activity particularly in Australia and New Zealand.

- An uplift in the strategic competencies and skills in the sector.
- The entry into the destination and markets of Polynesian Blue Airline.
- World and national economic circumstances that see more Australians and New Zealanders particularly looking for new short haul destinations rather than more traditional long haul destinations.
- Increasing interest from (relatively inexperienced) Samoan residents and business operators in entering the tourism industry and the need therefore to establish a framework for education, appropriate standards, and promotional unity.
- Increasing market interest in visitation to Samoa resulting from development and marketing targeted at particular niche market segments including the reasonably well established surfing market segment and the emerging weddings market segment.
- The advent of market demand for 'indulgence' and 'self discovery.'

These factors require that the destination '*be ready*' to adequately service demand growth that unquestionably is underway. These changes and opportunities will present significant challenges, requiring change to philosophy and structural organisation.

This Tourism Development Plan seeks to provide the framework to enable Samoa to respond to these challenges and changes.

Fundamental to this Plan is the recognition that available and anticipated financial resources will be relatively minimal and not entirely sufficient to achieve any significant influence by direct expenditure

A snapshot of total arrivals and earnings:

Tourist Arrivals:

2005	101,807
2006	115,882 (inc 18.8%)
2007	122,352 (inc 5.5%)
2008	122,163 (dec 0.2%)

Tourist Earnings (Gross):

2005	ST\$ 203.5 million
2006	ST\$ 236.3 million
2007	ST\$ 262.5 million

exclusively. Principles of partnership and effecting leverage are therefore crucial to effective and efficient achievement of the aspirations of this Plan. It will also be critical to generate supplementary revenue earning capabilities.

5.3 Tourism performance in Samoa – 10 years to 2008

Tourism performance in recent years from key source markets is summarized as follows:

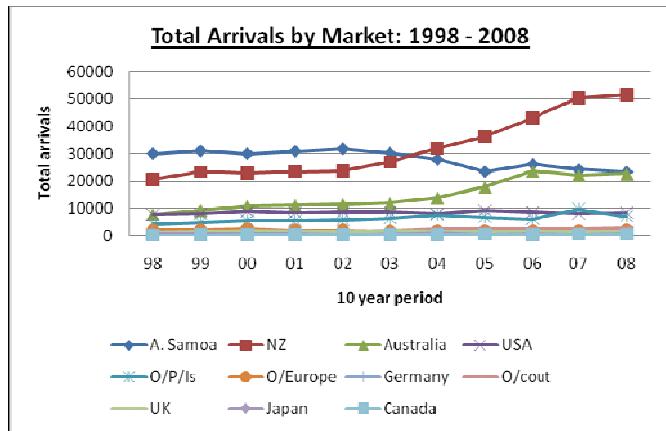
5.3.1 Overall performance

A snapshot of tourist arrivals over the last four years is provided as follows:

Total arrivals and trends by core markets over the ten year period 1998 – 2008 are summarized in the following table:

	1998	2008	Actual change	% Change
New Zealand	20,627	51,533	30,906	149.8
American Samoa	30,062	23,351	-6,711	-22.3
Australia	7,886	22,643	14,757	187.1
North America	8,037	8,893	856	10.7
UK/Europe	4,917	5,091	174	3.5
Other Pacific Islands	4,261	7,052	2,791	65.5
Other Countries	1,244	3,600	2,356	189.4
TOTAL	77,926	122,163	44,237	56.8

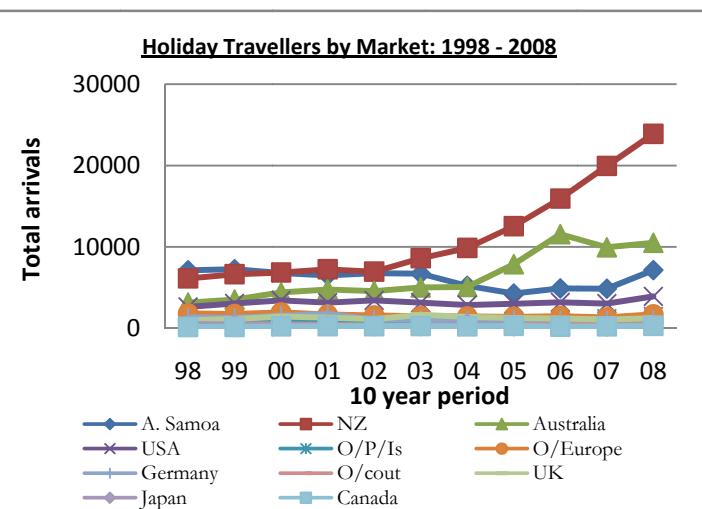
Total arrivals and trends by market over the ten year period 1998 – 2008 are demonstrated in the following graph:



The long haul markets, such as UK and Europe have increased by 3% and also continued to be reasonably strong growth from the North American markets as shown by the 11% growth in the past 10 years.

5.3.2 Performance by traveller type

Trends in leisure traveler arrivals during the period are demonstrated in the following graph:



From 1998 to late 2006, there were 2 weekly flights connecting North America with Samoa – Air New Zealand's direct flight from Los Angeles and

Polynesian Airlines weekly flight from Honolulu. From late 2006 to now, Air New Zealand's weekly

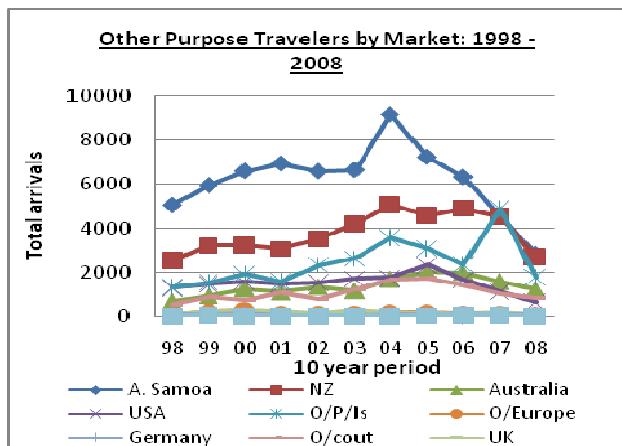
flight remains as North America's only direct link to Apia. It is noted that this service is also used by visitors from UK/Europe. The marginal increase in both North America and UK/Europe can be partly attributed to this reduction in capacity and frequency and other factors which have worked against long-haul travel such as political unrest, SARs, terrorism and higher oil prices.

Growth in overall visitors during the 1998-2008 period has been significant.

Over the last 10 years, visitor numbers from NZ and Australia have more than doubled. This can be attributed to factors including increased capacity and frequency with more point-to-point flights, aggressive marketing campaigns and greater awareness about Samoa, increased availability of marketable holiday products and security and political issues globally and in competing destinations.

Arrivals from American Samoa declined by 20% over 1998-2008. This trend is showing signs of stabilising and should be reversed in the short-term with increased frequency/capacity, planned marketing activities and the ease with which entry permits to Samoa can now be obtained.

Trends in “other purposes” traveler arrivals during the period are demonstrated in the following graph:



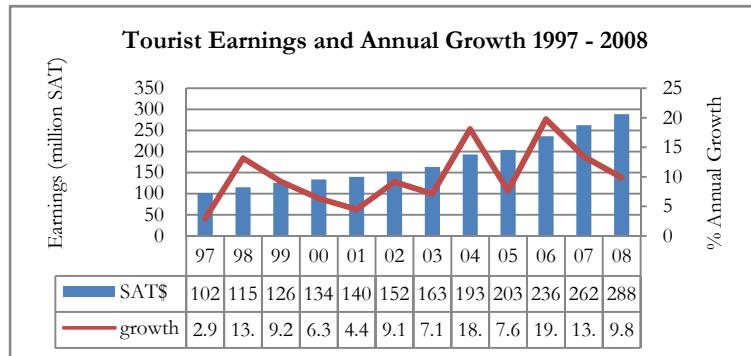
5.3.3 Economic contribution

A snapshot of economic contribution:

- Contribution to Gross Domestic Product approximately ST\$106.0 million (10%)
- Contribution to Government Revenues approximately ST\$16.0 million
- Tourism Direct Employment: 5,400 persons which is approximately 10% of national employment. 2,018 are employed in the hotels and restaurants industry.

While total arrivals increased by more than 50%, earnings increased from \$101.8m in 1997 to \$288.4m in 2008 - a rise of 183%.

Total tourist earnings and growth arrivals during the period are demonstrated in the following graph:



A snapshot of visitor expenditure:

Average expenditure per person of ST\$2,319 and average daily expenditure of ST\$331

Average Expenditure (by Market)

Australia	ST\$2.7 million per month
USA	ST\$2.6 million per month
Europe	ST\$2.5 million per month
NZ and Other	ST\$2.4 million per month

Average Expenditure (by Purpose)

VFR	ST\$2.6 million per month
Business	ST\$2.2 million per month
Other	ST\$2.13 million per month
Holiday	ST\$2.1 million per month

*Data based on June 08 IVS/NVS data

6. Link to the Strategy for the Development of Samoa 2008 - 2012

The significance of the tourism sector in Samoa is clearly recognised and articulated in the Strategy for the development of Samoa 2008–2012.

“The Government of Samoa regards tourism as a leading sector in the future national growth process. Tourism can generate employment and foreign exchange earnings, and thus offset the effects of the recent downturns in agriculture, fisheries and manufacturing and the slowing of construction activity after the South Pacific Games. Government will continue to encourage investment in tourism through implementation of the Tourism and Hotel Development Incentives scheme.

The strategy further recognises the opportunity to build on the surge in visitor numbers and expenditure after the introduction of flights by Polynesian Blue in late 2005 and the recent significant increase in accommodation capacity.

It anticipates the need of marketing strategies to increase levels of awareness in selected markets where primary focus will be on New Zealand, Australia and American Samoa, with secondary focus on other traditional markets in Europe and North America.

The Strategy for Development also recognises that effective marketing strategies require the availability of primary and secondary tourism research, and accordingly undertakes that the STA will ensure the delivery of regular relevant research and statistical reports.

The Strategy goes on to recommend initiatives to develop new tourism products and enhance those in existence. This requires the continuous development and enhancement of tourism facilities in accordance with excellent quality standards, including supporting

7. Our Vision for Tourism in Samoa

environmental sustainability as the foundation of quality tourism standards.

It is anticipated that STA will directly improve townscapes through the National Beautification Committee. Under the Tourism and Hotel Development Incentive Act 2003, foreign investment in hotel development will continue to be encouraged. In particular, foreign investment in medium hotel developments in the rural coastal areas will be aggressively pursued, and will require STA to advance the process of identifying potential land that can be leased for hotel accommodation development, in coordination with the Ministry of Natural Resources, Environment and Meteorology, the Office of the Attorney General and other relevant ministries.

The focus in the area of human resource development is anticipated to be on improving tourism employee performance through relevant skills training, in addition to promoting local awareness on the importance of tourism to Samoa’s economic growth and prosperity of rural areas. It is expected that the training focus will also broaden the scope of business advisory services for small to medium sized tourism enterprises.

Planned activities include “train the trainer” programmes, overseas study tours, and the continuation of workshop-based training through STA’s partnership with the Small Business Enterprise Centre and via the expanded role and capacity of the National University of Samoa’s Institute of Technology. Further opportunities will be made available under a partnership arrangement with the recently launched Australian Pacific Technical College which has a Tourism and Hospitality faculty.

Implementation of these tourism development strategies is expected to support a growth in visitor numbers from 122,163 in 2008 to 170,000 in 2013, or an average annual growth rate of 7%.

Tourism in Samoa will be strategically focused on promoting and delivering the truly unique and distinctive Samoan Experience.

The Samoan Experience is underpinned by strong themes of pristine nature, soft adventure, cultural appreciation, personal rejuvenation, indulgence and self discovery, safety and security, whilst also enjoying truly warm and genuine community welcome and exceptional and world renowned Samoan hospitality.

The future of Tourism in Samoa will be as a strong, sustainable and dynamic sector that is:

- Recognised for delivering fulfilling and uniquely differentiated life enhancing experiences to all visitors.
- Celebrating, promoting, and protecting and preserving our people and our unique cultural and natural heritage.

- Clearly defined and positioned in core target markets and market segments, selected for best effect from Samoa's distinct competitive advantages.
- Proactively responsive to all visitor needs, and changing traveller patterns, and constantly striving for continual improvement.
- Continually well researched, informed and strategically focused for optimum outcomes for all stakeholders.
- Contributing significantly to our long term economic, environmental, cultural and social development and sustainability with equitable distribution of benefits throughout Samoa.
- United by a collaborative culture and mutual respect across our community, industry and Government sectors.
- Embraced and respected by all Samoans as proud and willing ambassadors.

8. Rationale Underpinning Vision

Fundamentally, Samoa faces some significant competitive challenges in growing tourism.

- Samoa is comparatively more remote, difficult to access and therefore frequently, a more expensive destination.
- With notable exceptions of VFR, business market and more recently surfing, segments, and leisure markets have in the past generally, in the first instance, been drawn to the broader South Pacific region, rather than to specific destinations within the region. In this regard, there has been a reasonably widely held perception that all South Pacific island holidays are roughly equal in terms of beaches and sunshine (sun, sea, surf and sand) particularly for families.

An assumption that holiday experiential value will be roughly equal, inevitably leads consumers to make their travel choices on the basis of cost.

Given the extremely perishable nature of tourism stock (i.e. available room nights, beds, seats, and other similar daily carrying capacities), and the commercial imperative of return on capital invested, it is frequently necessary to respond to this market behaviour by competing on the basis of 'lowest cost' to consumer (or cheapest). Price led competition is of course a perfectly acceptable commercial and economic strategy, particularly when competing for larger market share of larger mass markets.

Nevertheless, price led competition is only one strategy amongst a multitude of other mixed and varied competitive strategies.

Importantly, whilst Samoa is decidedly seeking significantly increased volumes of visitors over levels currently being achieved, Samoa is not seeking what in world terms can be regarded as mass tourism. Indeed, on the contrary, there is concern to ensure that the quality of life and the Fa'a-Samoa are not in any way

prejudiced or imperilled by possible downside risks of mass tourism.

On this basis, it is certainly not critical that Samoa compete exclusively on a price led basis. Volume business is important, and is critically necessary to ensure the commercial viability and therefore continuity of air services and access. Nevertheless, Samoa does not have the need to capture every potential tourist and indeed has no actual capacity to accommodate anything other than what in world terms can only be considered relatively minor volumes.

Samoa has therefore, the enviable latitude to be discerning in market selection, to differentiate and in so doing, to target and capture primarily the type of tourism that best benefits Samoa.

To compete effectively otherwise than exclusively on cost requires competition on the basis of value. Essentially, this requires clear differentiation from cheaper options and emphasis must be upon *unique competitive advantages* and *added value* to be derived by the consumer and answer the question "*Why should I pay more?*"

- How then can Samoa effectively compete?
- Where is the added value that can be delivered to the consumer that justifies the purchase decision.
- How does Samoa differentiate from other competing destinations?,
- What are the unique competitive advantages that enable Samoa to make and fulfil the promise?

The answer lies in clearly understanding what experiences it is that the visitor is actually seeking and what it is that is actually being delivered. It is more than simply meeting a visitor's logistical needs such as accommodation and hospitality, attractions, tours and entertainment. It is more than simply a change of scenery and a holiday experience. It is more than pristine beaches, lush rainforests, and exquisite environment. (After all, as special as these are, there

are nevertheless other destinations which are able to make similar claims).

It is more than simply a visitor's experiences such as exceptional surfing or connecting with and appreciating other cultures and traditions. It is more than simply being warmly and genuinely welcomed into and feeling safe and secure in a community, and delivering improvement to life, rejuvenation, reinvigoration, self discovery, reconnecting relationships, families and what it is that is important, finding personal happiness and contentment.

What it is that is being sought out by the visitor and what it is that is being delivered by Samoa is actually a cocktail mixture of some and/or all of these needs that the consumer has and that Samoa is capable of satisfying.

It is something that is entirely and genuinely authentic and unique and cannot be found anywhere else in the world. It is this collectiveness that makes it the unique Samoan Experience.

The concept of the Samoan Experience has supporting application to all forms of visitation to Samoa. It offers obvious appeal to leisure visitors but also has

more than just experiencing the exceptional tastes and colours of Samoa.

It is about all of these plus it is about appealing to and satisfying the psycho-graphical inner and emotional needs of the potential visitor. It is about

significant application to other market segments such as business and educational tourist segments where promotional benefits can be leveraged from catch phrases such as '*serious business in a stunning location*' or '*serious study in a safe and stunning location*' and so on.

VFR markets tend to be more self sustaining but nevertheless will assume a sense of pride in enhanced reputation and awareness of Samoa as a desirable destination, and might be more motivated to personally visit and indeed to act as tourism ambassadors with word of mouth referral in their country of residence.

The future of tourism in and for Samoa will be therefore strategically focused towards the Samoan Experience as a key point of differentiation, unique competitive advantage and value proposition to the consumer market.

9. Our Guiding Principles

The key principles guiding the preparation of the Tourism Development Plan are:

- Hold true to, and preserve and promote our pride in our values and our natural and cultural heritage.
- Be discerning, work to our strengths and aspire to tourism which supports, engages and benefits the community.
- Aspire to quality visitor experience and service, delivering on and exceeding the promise.
- Seek to establish and maintain balance in demand, access and supply.
- Support initiative and seek to establish diversity of experience, activities, products and services.
- Commit to social, cultural, environmental, and economic responsibility and sustainability.
- Operate in partnership between all stakeholders (Government, Industry, and Community).
- Empower a whole of sector lead agency.
- Remain dynamically market focused and driven.

10. Our Stakeholders

The key stakeholders in implementation of the Tourism Development Plan are:

- Our people of Samoa
- Our Government of Samoa
- All our Samoan communities, both domestic and abroad
- All carriers and tourism industry suppliers
- All business and industry members within Samoa
- All our trade partners throughout the world
- Our visitors and guests
- Our Development Partners

"Tourism is everybody's business"

11. Our Destination Imagery and Brand

An effective brand is not simply a name or slogan. An effective brand is one that conveys a collection of images, feelings, and emotions in the consumer's mind when the name or the slogan of the destination is articulated or shown. The characteristic of a good brand is that it builds the trust, confidence and comfort of its customers and it delivers on its promises.

Key images, themes and emotions underpinning the Samoan Experience are:

11.1 Our icons

It is usual when developing brands and desired imagery to give emphasis to "icons". These can be both natural like Ayers Rock and the Great Barrier Reef in Australia and man-made like the Pyramids in Egypt, the Eiffel Tower in France or Westminster Abbey in the United Kingdom. The essence and strength of icons is their stand-out quality which does not necessarily lie in genuine uniqueness. They do not stand out simply by virtue of being the only one but by virtue of some other factor that distinguishes it from the others. There are many, many coral reefs but only one Great Barrier Reef. There are many historical tombs but the pyramids are perhaps the largest and most distinctive. There are many radio towers throughout the world but the Eiffel Tower can only be seen in Paris.

If the icons aren't immediately obvious, it is sometimes possible to create the iconic illusion by promotion. There are many tropical rainforests in the world, but Sri Lanka has successfully positioned itself as 'The earth's lung' This environmental message has had significance with top end eco-tourists in particular. There are lessons here for Samoa.

Potentially iconic "must do" experiences that might provide a basis to be developed could for instance include:

- The fact that Samoa is the furthest most western civilization on the planet. So much so that many

visitors came for the change of millennium in order to see the last sunset of the twentieth century. Samoa is essentially at the end of the earth, or on the very edge of the earth.

- Iconic activities such as '*great walks of the world*' and '*great bike rides of the world*', which could be developed across both main islands.
- Scope exists to promote surfing in Samoa as the *peak or inspirational* icon of the surfing world.
- Scope also exists to establish Samoa as one of the great film locations of the world. There is already some historical significance as regards "Return to Paradise."
- The Robert Louis Stevenson story and museum, which is listed as 'one of the 101 things that must you must do before you die' publication.
- The Alofa'aga blow-holes and other areas that might eventually acquire world heritage status.
- The full body tattoo which is uniquely Samoan and is not found anywhere else in the world.
- The Samoan belief that Samoa is the sacred centre of Polynesia.

11.2 Our natural environment

- Clean waters, clean air
- Pristine beaches, waterfalls, rainforests, blowholes, swimming pools
- Iconic natural attractions
- Unspoilt
- Lushness
- Cleanliness
- Community pride in living environment
- Beauty of flowers and gardens
- Colours and scents

11.3 Our built environment

- Distinctly Samoan architecture, open houses or fales
- A country of churches
- A comfortable blend of old and new
- Uncluttered, unhurried
- Relaxed and relaxing

11.4 Our People and Culture

- Exceptional warmth, friendliness, welcoming
- Exceptional hospitality and courtesy
- Exceptionally strong family values
- Exceptionally strong religious commitment
- Passion, happiness (fififia), laughter and smiles
- Contented and at peace with themselves
- Inclusiveness
- Openness, honesty and trustworthiness
- Healthy
- Distinctive Samoan Tatau or Tattoo
- A “living” culture

11.5 Our cuisine, fashions and designs

- Exotic tropical foods, fresh seafood and fresh organic fruits and vegetables
- The scent of burning coconut
- The health enhancing properties of coconut oil
- Polynesian designs and colours
- The Sei (flower worn by ladies)

11.6 Our special activities

- Samoan cricket
- Fautasi (long boats) races
- Rugby (Manu Samoa)
- Fire knife dancing
- Samoan comedies (faleaitu)
- Other traditional games and activities such as taulafoga, seuga manulele, aloga atu, taga ti'a and others

11.7 The sensations that Samoa engenders

- Comfort
- Contentment
- Safety and security
- Exhilaration and freedom from remoteness, isolation and wilderness
- Excitement
- Romance

12. Goals for Tourism

The following goals will be the focus of the continuing development of a sustainable tourism industry for Samoa.

12.1 Economic goals

- Attraction of both domestic and international investment in tourism assets and businesses in Samoa.
- Generation of employment opportunities, businesses and a vibrant national economic sector with benefits for all Samoans.
- Attraction of foreign exchange receipts as effectively “export earnings” public and private investment in tourism.
- Generation of greater demand which will justify and enable more tourist and support infrastructure development as incremental benefits to all Samoans.

12.2 Social goals

- Development of greater competencies and skills within Samoa.
- Create employment and career paths which will help to keep young people remain in, and return to Samoa.

- Establish opportunities for residents to develop businesses and achieve enhanced personal financial independence.

12.3 Cultural goals

- Ensuring the integrity of the Samoan culture, traditions and history is preserved and protected.
- Celebration of pride in traditional Samoa culture and traditions (particularly amongst today's younger and future generations).
- Promotion of greater awareness and appreciation and respect for people, culture, history, traditions, and environment.

12.4 Environmental goals

- Preservation and sustainable management of land and marine ecosystems of Samoa.
- Minimisation of environmental impacts of tourism.
- Adoption of environmentally sustainable and sensitive tourism infrastructure and design and operating standards.

13. Relevant Economic and Social Trends

2008 saw the advent of the Global Financial Crisis (GFC), which has seen major upheaval throughout all economies particularly in the Western world amongst which core and emerging markets for Samoa tourism are part. Observations of major aspects and implications within all key source markets are:

- Collapse of Financial Markets
- Uncertainty and lost confidence
- Rapid decline in currency value
- Interest rates significantly decreased following record rises
- Commodity prices plummeted and mining boom softening
- Slowing domestic economic growth
- Decline in retail sales environment
- Increasing personal debt
- Slow down on commercial developments
- Declining consumer brand loyalty
- Business conditions lowest since 9/11 attacks
- Significant job losses

The severity and the extent of the GFC on a worldwide basis cause the sector to be in uncharted waters. In essence, the future is at this stage uncertain.

This fact alone will necessitate careful and constant monitoring of tourism trends, traveller patterns, behaviours and nimble strategic response in order to remain competitive as a destination.

Some key relevant social changes that are reasonably common between Australia and New Zealand as major source markets are:

- Society is middle aging (1 in 10 over 65)
- Baby boomers are now in prime income time of life
- Increasing dual career couples

Whilst these groups are significantly more affluent, they are also more:

- Individualistic
- Demanding
- Informed
- Stressed and
- Discriminating

This means that they are harder to win. They are more discerning and demand higher quality and better service but, they have the capacity and are willing to pay for it.

The significant implication here is that, real opportunity exists to target higher yielding tourism visitation by ensuring a destination with products and services that are truly appealing and distinctive in character and which meet and exceed visitor expectations of quality of experience and service.

There is a need therefore to re-define target winner market segments, refine and tailor product presentation and marketing to those market segments.

Competitive emphasis should be focused towards unique products and services of quality and distinction rather than on comparative prices and simply cheaper "me too" products.

In essence, this signals a subtle incremental focus in approach from promotion and sales targeted at mass markets generally, to a greater refinement as to selection of target markets and market segments where the Samoan Experience can clearly be established as being a unique competitive advantage.

14. Significant relevant industry trends

Some significant and relevant industry trends are:

Rationalisation of airlines:

- Movement to low cost carriers
- Alliances
- Escalating cost of fuel
- Emphasis on profitability and cutting of unprofitable routes

This trend opens opportunities in that travel is now more affordable to consumers and indeed more destinations are increasingly becoming accessible given the developing greater connectivity. The counter-side is that more competing destinations have become increasingly available to consumers.

The profit driven dynamics of the aviation industry also highlights the risk of less dependability on continuation of all existing services. Destinations must now actively participate in ensuring that loadings and profitability are maintained and grown in order to preserve continuity of service.

Industry response to these issues should be to:

- Build partnerships and strong communication channels with airlines and
- Develop strong aviation access strategy

Surge in internet reservations:

More and more consumers are making their travel enquiries and reservations on line. The opportunity exists to embrace the technologies so that greater mass market exposure is achieved.

The counter-side is that these technologies are similarly available for all other competing destinations. This means that it is not simply enough to have an electronic presence or to simply do the same as others. In today's market, it is essential to stand out as well as to ensure optimisation of technologies utilised.

The necessary response therefore is to develop, implement and maintain a robust and dynamic on-line strategy.

The rise to prominence of "Generation Y":

Generation Y also commonly known as Gen Y, is the name given to the modern younger generation of adults. Research has clearly demonstrated that this particular demographic has quite specific behavioural patterns which need to be factored into marketing strategies.

- Generation Y is 18 to 25 years old
- They want it all, and want it NOW
- They multi-task particularly utilising electronic media.
- They need immediate responses to all enquiries
- At present, Gen Y account for 20% of workforce. In 10 years time they will account for 40% of the workforce and they will be in the position of decision makers.

The implication here is multi-faceted. Not only is generation Y a potentially key market segment now, but it is also the face of all core market segments of the future. The industry therefore needs to not only focus on the needs and wants of Gen Y as consumers, but also as the decision makers of key trade partners of the future. Accordingly, there is a need to better understand the Gen Y implications and to gear marketing and promotional communication strategies appropriately. There is also the need to tailor products to better meet the needs of the Gen Y demographic.

To do nothing is to become stale, old fashioned and fail to meet market expectations.

Climate Change:

Consumer markets, particularly in the northern hemisphere and specifically in Germany and the United Kingdom, are increasingly concerned with the carbon emissions generated by long haul air travel. They are increasingly reflecting these concerns in preferring and selecting short haul destinations. The impact of this relatively new social phenomenon is

already being experienced in other long haul destinations of Australia and New Zealand.

Samoa needs to recognise this consumer trend and to develop an appropriate response strategy. The strategy should incorporate a theme that Samoa's sustainability practices and eco-efficiencies particularly those of tourism industry operators, are such so as to more than appropriately off-set the carbon footprint of long haul travel. In the longer term, the strategy should connect with the proposed accreditation process.

15. Core Markets Outlook

15.1 New Zealand

Key economic indicators in NZ are on the decline. Energy and food prices have increased and consumer spending and confidence are forecast to fall. However, the outlook for 2009 is expected to improve with planned tax cuts.

Competition between airlines on the Trans-Tasman route is heating up with added capacity and frequency. Further, Pacific Blue has entered the domestic market with its low cost fares which will highlight domestic tourism options. Airline capacity and frequency has also increased with Air New Zealand operating 7 flights a week while Polynesian Blue operates 6 weekly flights.

There have been some recent changes in the travel trade with GO Holidays taking over management of Stella Travel Services wholesale operations including Gullivers Holidays.

With the financial crisis and strengthening USD, it is likely that New Zealanders will be looking at closer to home destinations. With ongoing marketing activities and Samoa being less than 4-hours away, Samoa is positioned to capitalise on this opportunity.

15.2 Australia

The economic outlook for Australia is generally similar to that for NZ. On the whole, there is an expected slowdown in spending as Australians move to reduce household debt.

Again, competition on the Trans-Tasman route is intense and domestic holiday options continue to be marketed strongly. Capacity and frequency has increased since December 2008 when Polynesian Blue launched its direct Brisbane-Apia flight. This has increased the number of direct flights to Samoa to 4 per week.

Australia is a net-exporter of tourism and the forecast is for that trend to continue. Combined with the

financial crisis and strengthening USD, it is likely that Australians will be looking at short-haul destinations for holidays. With aggressive marketing, Samoa is well positioned to benefit.

15.3 American Samoa

Efforts to develop an undersea fiber-optic cable link and establish a Call Centre are well advanced and are part of the Government's drive to promote economic development. The opportunities presented by these projects are enormous. Further, the strength of the USD against the Samoan Tala, Samoa being only a very short 30 – 40 minute flight away and the easing of the entry permit application process mean that demand for travel to Samoa should strengthen.

Traditionally, there has been a strong awareness within American Samoa as to the attraction of tourism in Samoa and accordingly, little marketing or promotional effort was focused into this market. Nevertheless, an opportunity exists to target expatriate Americans and Europeans who are undertaking contract work in American Samoa, for weekend getaways and short term visits. This opportunity will be facilitated by the proposed re-opening of Fagali'i airport for services to American Samoa.

15.4 North America

The effect of the credit crisis on consumer confidence and the likelihood of a recession in the US economy are having an impact on consumer spending. Despite this, Expedia reports that '*Americans still arranged holidays and are flying and staying at hotels about as much as they have in recent summers*'.

Across the border in Canada, inflation is on the rise, driven mainly by higher fuel prices. Cost and seasonality play important roles in the decision making process of Canadians. In the winter, there is a preference for sun, sea and sand and airfare (i.e. affordability) is what many look at first when planning their trip.

The major aviation issue at present is the continuity of the Air New Zealand weekly Los Angeles to Apia flight. This flight is the only direct link to the North

American market and the possibility of its removal would present numerous challenges for the industry and Samoa's economy as a whole.

15.5 United Kingdom/Europe

Visitor numbers from UK/Europe have been on the decline since 2005. Recent years' fall can in part be put down to the Rugby World Cup in France which would have attracted some of the traffic which New Zealand, Australia and the South Pacific might otherwise have experienced.

Consumer confidence in the UK is presently low. The financial sector is experiencing some instability. Mortgage costs are on the rise, house prices are falling and inflation is on the rise. The Daily Telegraph reported in late 2008, that the average UK family was 600 pounds worse off than the previous year. Added up, this is likely to lead to a greater preference for domestic and short-haul travel.

Similarly for Germany and the rest of Europe, the obvious obstacles are distance, higher fuel prices and the high cost associated with destination marketing.

16. Forecast Performance

An average annual growth rate of in the order of 7% in visitor arrivals is forecast over the next five years which will in total generate approximately 170,000

visitors and an overall increase in total room nights estimated to grow to in excess of one million, as follows:

	Estimated Actual 2008	2009	2010	2011	2012	2013	Average Annual Growth %
NZ	52,609	54,713	56,902	59,178	61,545	64,007	4.0
Australia	23,140	24,528	26,000	27,560	29,214	30,967	6.0
Am. Samoa	22,557	24,813	27,294	30,023	33,026	36,328	10.0
North America	8,510	9,021	9,562	10,136	10,744	11,388	6.0
UK/Europe	4,897	4,995	5,095	5,197	5,301	5,407	2.0
Other Pacific	6,864	7,550	8,305	9,136	10,050	11,055	10.0
Other	3,914	4,697	5,636	6,763	8,116	9,739	20.0
Total	122,491	130,317	138,794	147,993	157,995	168,891	
Growth (Nos)		7,826	8,477	9,199	10,001	10,896	46,400
Annual Growth %		6.4%	6.5%	6.6%	6.8%	6.9%	37.9%

	Estimated Average Room Nights	Forecast 2009	2010	2011	2012	2013
NZ	8	437,707	455,215	473,424	492,361	512,055
Australia	4	98,114	104,000	110,240	116,855	123,866
Am. Samoa	8	198,502	218,352	240,187	264,206	290,626
North America	3	27,062	28,686	30,407	32,231	34,165
UK/Europe	3	14,985	15,285	15,590	15,902	16,220
Other Pacific	3	22,651	24,916	27,408	30,149	33,164
Other	4	18,787	22,545	27,054	32,464	38,957
Total		817,807	868,998	924,310	984,167	1,049,053
Average Room night per person		6.3	6.3	6.2	6.2	6.2

17. Consumer Travel Patterns and Preferences

Virtually, no current detailed consumer research in relation to consumer travel patterns and preferences as regards Samoa is available. Nevertheless, generic consumer research undertaken by Tourism Australia in 2007 has relevance and demonstrates travel and behaviour patterns that might be applied as relevant to tourism in Samoa. A summary of key findings are as follows:

17.1 Motivators and preferred experiences

Key motivators for overseas travel:

- Different food, language, culture, history and climate
- Diverse experiences, scenery and shopping
- Value for money (airfares, exchange rate, accommodation, shopping and dining)

Preferred Travel Experiences:

- Relax, recharge, pamper, indulgence or spa
- 'Fly and flop'
- Break from routine – self discovery
- Reconnect with environment
- New experiences – to learn and grow
- 'Bragging rights'

17.2 Travel patterns

Key sources of travel information:

Intending travelers' source of information is not just from a single source, but from a mixture of a number of sources. Research indicates that, of all travelers surveyed, the following percentages accessed influencing intelligence from each of the following sources:

- Internet 65%
- Travel agents 62%
- Word of mouth 35%

Key concerns:

- Security and safety issues 55%
- Running out of cash 22%
- Losing one's baggage 21%

Main activities:

- Entertainment 80%
- Shopping 77%
- Visiting historical sites, museums, art centres 64%

Most preferred shopping items:

- Clothes and personal effects 71%
- Luxury items, jewellery, branded goods 53%
- Local souvenirs, antiques, arts and crafts 50%

17.3 Interests by life stage segment

Young singles:

- Energy, excitement, gaining personal freedom
- Adventure
- Activity
- Dining out

Young couples:

- New experiences
- Flexible itineraries
- Fun, but not wild
- Romance
- Escape, adventure, indulgence, adrenaline

Families:

- To reconnect as a family
- Destination rather than experience
- Inclusive deals
- Simplicity
- Plenty of activities

Older couples:

- More luxurious holiday
- Constantly searching for "new" options
- Exercise programs
- Dining out

Seniors:

- Unique and precious experiences out of the reach of the average traveller
- New skills
- Culture and heritage

- Company of ‘like-minded’ people

Whilst no formal consumer research reports are available, anecdotal evidence and informed opinion suggest that current leisure visitor arrivals to Samoa

are comprised of demographic segmentation from each target market as shown in the following tables.

Current Travel Type Segments and Relative Level of Performance

Segments	Markets						
	Australia	New Zealand	American Samoa	North America	UK/Europe	Other South Pacific	Asia
Holiday/Leisure	5	5	3	5	5	2	4
VFR	5	4	5	3	1	3	3
Business/Conference	3	3	1	1	1	3	2
Other	1	1	1	1	1	4	2

Note: Ratings from 1- 5; with 5 indicating relatively strong representation and 1 insignificant representation

Current Demographic Market Segments and Relative Levels of Performance

Segments	Markets						
	Australia	New Zealand	American Samoa	North America	UK/Europe	Other South Pacific	Asia
Young Singles	3	3	2	2	4	2	1
Young Couples	4	5	3	3	4	4	3
Families	5	5	5	3	2	2	1
Older Couples (45+)	5	5	4	3	3	1	2
Seniors, empty nesters/retired	3	3	3	4	4	1	3

Note: Ratings from 1- 5; with 5 indicating relatively strong representation and 1 insignificant representation

A key implication of this intelligence is that, marketing and promotional strategies can be refined to be more strategic focussed by being targeted at specific demographic segments in specific target markets. The process also permits focus to be given to

targeting areas of best effect and ensuring greatest efficiency from limited marketing budgets (better “bang for buck”).

Continuing the process and drilling further into visitor profile, anecdotal evidence and informed opinion

suggest that the leisure activities preferences of each of the demographic bands of current visitor arrivals to

Samoa are comprised as shown in the following table:

Current Activities and Relative Level of Participation by Segment

Segments	Activities							
	Relaxing	Touring / Scenery	Surfing	Diving	Rain-forests	Wildlife / Bird watching	Trekking / Walking	Other
New Zealand	5	4	3	5	3	3	3	5
Australia	5	4	5	5	3	3	4	5
American Samoa	2	1	1	1	1	1	1	3
North America	5	4	3	3	3	3	3	3
UK/ Europe	5	5	3	4	5	4	5	5
Other South Pacific	2	2	1	2	1	1	2	2
Asia	4	4	1	1	4	3	3	2

Note: Ratings from 1- 5; with 5 indicating relatively strong participation and 1 insignificant participation

A key implication of this intelligence is that, product development strategies can be refined to be more strategy focussed towards meeting actual consumer needs and in so doing to better raise their levels of satisfaction with their experience and the destination.

Marketing and promotional strategies can also be further refined to be more strategically focussed to

give appropriate emphasis to experiences available for the particular demographic that is being targeted. Once again, the process aids in achieving best effect and greatest efficiency of spend.

Extending the analysis to interest by demographic band as follows enables even further customer oriented strategic refinement.

Characteristics of activities undertaken by current markets to Samoa

Segments	Activities						
	Relaxing	Touring / Scenery	Surfing	Diving	Rain-forests	Wildlife / Bird watching	Trekking / Walking
Young Singles	4	5	5	5	3	3	4
Young couples	5	5	4	4	3	3	4
Families	5	5	3	3	3	2	2
Older Couples (45+)	5	4	2	2	2	2	2
Seniors empty nesters/retired	5	5	1	2	2	2	1

Note: Ratings from 1- 5; with 5 indicating relatively strong participation and 1 insignificant participation

18 Key Themes of Strategy Development and Action Plan

Key themes of the Tourism Development Plan are:

Operating strategies:

- Destination promotion and marketing
- Product, service and infrastructure development
- Resource Management

Underpinned by Enabling strategies:

- Access
- Land, business and investment.
- Tourism capacity building and workforce development
- Research, planning and impact management
- Institutions and industry framework

18.1 Destination promotion and marketing

18.1.1 Introduction



Effective promotion and marketing of the destination, tourism products and services, and opportunities for investment is critical for Samoa to be positioned as an appealing, competitive and compelling tourism and investment destination.

The need for clear strategic focus and effectiveness in the market cannot be overstated. At this relatively formative time in development of the destination and in establishing position in the market, effective promotion and marketing will be the difference between the success and failure of tourism in Samoa.

STA is mandated as peak agency for promotion and marketing of Samoa as a tourist destination. Within the constraints of available resources, initial emphasis is to market the destination in selected primary and secondary source markets in order to increase market awareness about Samoa as a holiday destination and foster market conditions that are

conducive for the tourism private sector to market their individual products and services.

Fast developing technology continues to play a vital role in tourism development and marketing. As such, online marketing opportunities are and will continue to be a key tool which STA will fully employ to promote Samoa in all markets and market segments including those in the secondary and long-haul markets.

It is planned that all marketing efforts will be complimentary and direct a stronger collaboration between Government, the tourism private sector, airlines and Samoa's overseas travel trade partners.

It is recognised that markets and competition are dynamically changing in this ever accelerating sector. This being so, there will be a need in future to move marketing and promotional strategies and thinking to a new level and to present and communicate product experiences in a different manner. This will ensure that there is a more easily understood match of consumer need with the experience available. It will be desirable to examine how existing and new products can better be utilised and repositioned to cater for new geographical or psychographic segments or new services.

Fundamental social changes such as the needs of ageing populations in relation to health, winter escapes and personal development or lifestyle options will create new opportunities for refined market focus.

18.1.2 Goals and key areas of focus

18.1.2.1 Goals

- To increase visitation to Samoa.
- To increase yield to Samoa.
- To increase visitor nights, length of stay and spend.
- To increase repeat visitation.
- To address the imbalance of seasonal visitation and to extend the tourism season towards a full 12 months.
- To achieve greater dispersal throughout Samoa
- To achieve efficiency and effectiveness of all promotion and marketing efforts.

18.1.2.2 Key areas of focus

- To maintain, protect and grow visitation from existing primary markets.
- To build and strengthen distribution channels by facilitating commercial access to Samoa's tourism product and vice versa by facilitating access of Samoa tourism industry members' products to distribution channels.
- To build stability through diversified, new and emerging markets and segments.
- To engender strong word of mouth referral recommendation.
- To optimise a web based marketing strategy.
- To optimise industry marketing and promotional efforts by providing leadership, strategic coordination and guidance to industry members and other related promotional agencies.

- To maximise leverage opportunities and benefits by working in partnership with SHA and other industry bodies.

18.1.3 Strategies and plans

18.1.3.1 Strategically targeted marketing plan

- STA will continue to prepare and implement a dynamic Marketing Plan which will identify key markets, market segments and special interest groups (e.g. surfers, school groups, trekking, education tourism, snorkelling etc) where Samoa has special appeal.
- The Marketing Plan will operate on a 3 tier basis recognising core markets, secondary markets and emerging markets, outlined as follows:

Core markets	Secondary Markets	Emerging Markets
New Zealand	North America	China
Australia	United Kingdom	Japan
American Samoa	Germany	
	Other Europe	

The level and brief description of marketing activity, in respect of each of the core, secondary and emerging markets is summarised as follows:

Descriptor	Activity Level	Comment	Marketing Activity
Core	Maximum focus	<ul style="list-style-type: none"> • Core business • Good volume • Some awareness • Some distribution penetration • Dispersal, repeat and segment development potential • Mature industry. • Serviced by direct or well developed connections 	<p>Consumer focus:</p> <ul style="list-style-type: none"> • Web site optimisation • Co-operative advertising • Public relations • Sponsor media visits <p>Trade focus:</p> <ul style="list-style-type: none"> • Key wholesale partnerships – where applicable) • Media familiarisation programs / special events • Online activity • Repeat visitation and niche marketing strategies • Product diversity push • Direct access opportunities • STA in-market sales calls • Direct cooperative marketing activities with airlines

Descriptor	Activity Level	Comment	Marketing Activity
Secondary	Selective focus	<ul style="list-style-type: none"> Arrival levels moderate but potential to grow Awareness inconsistent targeted message 	<ul style="list-style-type: none"> Website Trade (wholesalers / agents) focus to build distribution, exposure/ itineraries / imagery / copy Boost brand awareness, public relations and familiarisation and regional sales and product training missions
Emerging	Minimal	<ul style="list-style-type: none"> Minimal arrival but growth in the short to medium term Awareness and distribution low Aviation connectivity low 	<ul style="list-style-type: none"> Minimal direct activity Website and target trade via STE Build Destination awareness Visiting journalist program itineraries / imagery / copy

The marketing plan works on a multi dimensional basis of target market segmentation by a mixture of consumer demographic, traveller type, purpose of visit, and psychographic.

The prime demographic segments of key source markets are:

- Young singles (Backpackers)
- Young Couples - no children
- Families
- Older couples (45+)
- Empty nesters/retired

Traveller types are categorised as Comfort Cravers or Pragmatic Professionals depending on how they source and finalise their holiday plans. They encompass group travellers and Free Independent travellers (FIT). Comfort Cravers are those who feel more comfortable leaving their travel plans to a travel agent. Pragmatic Professionals on the other hand are those who would rather prepare their own travel plans. Hence, planned marketing activities must utilise a combination of travel trade/intermediaries and direct marketing.

Within the broad categories of Comfort Cravers and Pragmatic Professionals are distinct bands of reason for travel. Broadly these are:

- Visiting friends and relatives (VFR)

- General leisure
- Niche Activity Based including Diving, Fishing, Surfing, Adventure Tours
- Weddings
- Business, meetings, conferences, events and exhibition
- Sports
- Education
- Special Interest Groups

Recent international research which looks at what consumers need from a holiday experience and then matches it with a destination's attributes and experiences is a completely new approach to tourism marketing and development.

In view of this, consumer psychographic research based market strategies are becoming increasingly adopted throughout more progressive destinations.

The basic principle is that customers need to see their very specific personal needs and wants being met by a destination and that it has gone beyond simply external experiences. It is about meeting consumers' emotional needs as well. It has become an internal journey of self discovery too.

There are no single set of agreed psychographic classifications. However, holidaymakers could for instance be categorised into the following six segments:

- Social Fun-Seekers
- Connectors
- Unwinders
- Active Explorers
- Stylish Travellers
- Self Discoverers

By way of example, visiting a national park might appeal to *Active Explorers* who want to push the boundaries through participating in a physically challenging activity, whereas *Connectors* may see the holiday as an opportunity to spend time with those they care about. On the other hand, *Self-Discoverers* just might want to get away and enjoy some peace and quiet. The new research means that when operators are looking at new products and marketing opportunities, they should consider what the appeal may be to different segments and tailor their product accordingly.

18.1.3.2 Strong branding and destination image development and management

The current Samoa branding carries the tagline *The Treasured Islands of the South Pacific* and is intended to highlight Samoa's unique culture, people and environment, which are underpinned by the *Fa'a- Samoa*. It is also in line with the aspiration of sustainable tourism that is culturally and environmentally friendly as well as economically beneficial for Samoa.

The tag has enjoyed less than full support from industry and trade within Samoa and operators have instead utilised a range of tags including *Heart of Polynesia*, *The Best Kept Secret*, *The Cradle of Polynesia* and *The Pearl of the Pacific*. This has resulted in mixed messages to markets with resulting confusion and lack of clarity as to Samoa's positioning and image particularly from the point of view of wholesalers and travel agents selling Samoa.

The issue of destination branding is to be studied and resolved. Given the fiercely competitive character of the market, it is imperative that the brand conveys the unique competitive advantage that truly sets Samoa apart from other South Pacific islands.

Specific brand and image management strategies are:

- Engage professional assistance in establishing brand and collateral
- Consider and incorporate the Samoan Experience as the image of Samoa, using the themes leisure, nature based tourism, cultural experience, heritage tourism and adventure tourism, indulgence and self discovery, rest, relaxation and re-invigoration, plus special interest themes such as iconic surfing, safety, as appropriate
- Support the brand with collateral information materials for distribution to trade, visiting journalists and others, on each aspect of the underpinning imagery
- Ensure adoption by all of industry

18.1.3.3 Visitor information and services

Tourism destinations must be capable of responding to information needs from potential and/or actual visitors on a number of levels, and via a number of distribution channels.

In effect there are two major stages of information search for consumers.

- Pre-arrival as part of their search process even before they have decided on the destination. Once the decision is made, they may undertake further search to assist them identify options for their pre-booking activity of travel and sightseeing arrangements.
- Post arrival as they seek information on the activities they can book post arrival.

More specific occasions and needs can include:

- Whilst they are conducting initial research as to alternative holiday options (*What has Samoa got that appeals to me?*)
- When they need further details in order to make a competitive travel decision (*Why this, rather than that? How much?*)
- Whilst they manage destination logistics (*How do I?*)
- When they need to understand behavioural protocols (*What should I do or not do?*)

- Whilst they enjoy the destination and desired interpretative experiences (*I want to know?*)
- When they need assistance (*I need, What if?*)
- When they have been delivered the promise (*What else? What next?*)

Information is channelled to visitors in a multitude of ways the more usual of which include:

- Retail or wholesale brochures
- Destination-specific brochures produced by the tourism marketing body
- Media, publicity, advertising and editorial coverage
- Web sites and internet
- Word of mouth
- Agent advice
- Response to direct enquiry (telephone, email etc)
- Tour guides
- Interpretative and other materials
- Signage

In recent years, there has been improvement in information about what to do and see in Samoa through guides. However, there is still reasonably limited collateral available for delivery of visitor information. There is still no consensus as to the Samoa brand and there is still an enormous amount of material to be collected and collated into appropriate promotional and interpretative materials. With the exception of predominantly higher end operators, there is relatively little comprehension of structured distribution systems and there are often therefore limited resources to enable comprehensive response to calls for information.

Consumer research conducted consistently by Tourism Australia provides an insight into the most important information sources for the consumer in western source markets. This is portrayed in the following table.

Source	%
Internet	65%
Word of mouth	35%
Travel agent	62%
Travel book	27%

Clearly, the single best and most important channel of information and media promotional distribution is and will increasingly become, use of the internet and websites. The importance of maintaining state of the art website and developing a web optimisation strategy cannot be overstated.

STA's website www.samoa.travel will be the primary point of first contact for information delivery. STA will continue to upgrade the site, incorporate interactivity capacities and keep all information and information technologies up to date.

STA will also seek to:

- Ensure the first step to visiting (requesting information via the web site) is a simple and positive process.
- Convert enquiry to sale, development of on line booking and interactivity capacities.
- Ensure all visitor enquiries are met with response at all stages in their progression.
- Ensure all channels to markets are appropriately well informed and continuously updated and supported.
- Ensure there is consistency about the branding, the themes of the messages being delivered about the destination, the Samoan Experience and other messages the destination wishes to communicate.
- Ensure information is being presented in an appealing manner and is accurate and up-to-date.

18.1.3.4 In market representation and sales missions and travel show representation

- Continue investment in in-market representation in Australia and New Zealand.
- Seek contractual representative arrangements in secondary markets.
- Coordinate and lead selected in-market cooperative sales missions.
- Participate in selected trade shows.
- Utilise out bound trade and sports delegations as ambassadors wherever possible.

18.1.3.5 Marketing and promotions

- Design and manage marketing and promotions in line with marketing plan.
- Maintain a calendar of marketing and promotional events and opportunities. Ensure timely dissemination of this intelligence to all industry associations and relevant operators.
- Encourage and support industry member attendance and cooperative ventures between industry members as representative of the destination at large.
- Encourage cooperative marketing programs and product packaging amongst the Tourism Industry.
- Look to utilise and leverage from Samoan celebrities. Appoint them as “tourism ambassadors.”

18.1.3.6 Media management

- Manage a media plan for on-going promotion and encourage media coverage of Samoa’s tourism products and events. Manage relationship with local and international target market press and media as a *’partnership.’*
- Proactively manage a visiting journalist program (target and respond to visiting journalists) and produce a media kit for distribution to visiting journalists.
- Establish operation systems and protocols in relation to disaster (cyclone, floods, tsunami etc) recovery media management to ensure that only accurate intelligence is distributed and

ensure that *’open for business’* is well publicised once recovery has been effected.

18.1.3.7 Data collection and market research

- Investigate sources, procure, and maintain market research and statistics on tourism relevant to Samoa as available to industry members, media, potential investors, etc.
- Draw upon in-market consumer research undertaken by organisations like PATA, SPTO and others.
- Market research should include the aim of filling gaps in the fragmented and anecdotal nature of data on visitors presently available. Where possible, data collection and reporting systems should be perpetual.

18.1.3.8 Production of promotional collateral materials

Compilation, and effective and targeted distribution, of a destination brochure and other promotional collateral for Samoa.

18.1.3.9 Familiarisations

- Encourage familiarisation programs, maintain a targeted and response coordination system and ensure inclusion of a diversity of suggested products.
- STA to educate industry members and build support capacities in familiarisation program management.

18.1.3.10 Business tourism marketing

- Target business based tourism including:
 - Business meetings, conferences, incentives, and product launches.
 - Possible movie production location.
 - Regional business and administrative meetings and conferences.

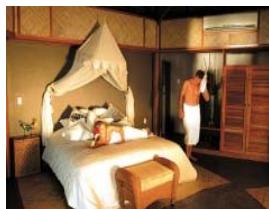
18.1.3.11 Events and festivals

- Facilitate development of events and festivals which can attract visitors and/or promote Samoa (e.g. Teuila festival, Miss Samoa contest, Sporting Tournaments, etc).

18.2 Product, service and infrastructure development

18.2.1 Introduction

18.2.1.1 The need for product and service development



Tourism is a ‘people industry’ involving the development and supply of a range of facilities, services and experiences to meet the needs, interests, aspirations and expectations of visitors.

The visitor experience continues from the moment of discovery, to arrival and until the moment of departure. The experience is an experience of all the senses. Seeing the sights, touching, participating and experiencing the attractions and activities, hearing the songs and the music, hearing the sounds and smelling the scents of nature and the man-made environment.

A tourist destination must be capable of meeting all the desires and needs tourists might have during their visit.

The tourism product therefore comprises not only of the distinct and unique cultural and natural assets and attractions of the region, but also the support facilities and services such as accommodation, dining, entertainment, transport and others.

Recent years have seen some uplift in availability and range of tourism product particularly in accommodation as well as in some attractions and activities plus other tourism support services in some areas.

There are reasonably well advanced development proposals and a number of promising indications of significant investor interest in developing a variety of new and varied resort style properties and other niche market, specialist, and activity based facilities

and operations. Proponent investors include both domestic and international interests.

Some significant product supply and quality issues exist such as:

- Capacities are very limited, particularly in the higher ends of the market and will have to grow and diversify to support anticipated long term demand.
- There is a significant “imbalance” of volume and capacity of developed accommodation, attractions and support facilities. There is surplus budget to standard accommodation stock, particularly in Apia and a relative shortage of deluxe style. There are a number of smaller boutique properties and very limited range of larger properties. This imbalance and shortage of larger properties results in difficulty in driving particularly wholesaler business where there is greater attraction to the volume business that other competing destinations are able to offer.
- Issues of quality exist. Property inspections and anecdotal consumer complaint have indicated that there are many instances where properties are failing to meet standards applying to consumer expectations of ratings categories that the properties are being marketed at. This might also have “truth in advertising” consequences.
- Feedback from visitors indicates a need for more diversity of activities and attractions. Generally speaking, consumers are looking for more things to do. Shopping options are presently very limited.
- Quality of service (particularly food, and food service) is inconsistent and frequently quoted by visitors in some informal exit surveys as “terrible to average” in terms of both quality and variety, and personal service.
- There are significant variances and lack of conformity between tourism operators of all kinds in relation to standards, ratings and quality.

Individually and collectively, these matters lead to less than optimal visitor satisfaction and word of mouth referral and potentially missed opportunities to capitalise on “value add” options. Certainly, opportunities of repeat visitation are reduced.

Island activities based on nature, culture and the coast, with a strong respect for the Fa’ā-Samoa will continue to be the core focus of Samoan tourism. Samoa’s strength in this area lies in the combinations of activities (for instance swimming, relaxing, scenic tours and diving) it offers, compared with other destinations that offer specific holiday activities such as trekking. Nonetheless, some small niche areas such as whale watching and educational tourism are promising exceptions to this rule.

Samoa is responding well to the demand for activity-based tourism as evidenced by the recent successes of well-managed marine tourism operations and surf tourism.

This strategy envisages the continual upgrade of current activity-based tourism operations and encourages the development of activity products such as whale and dolphin watching and overnight sea kayaking. It also addresses several issues that must be resolved if the future of sustainable tourism in Samoa is to be ensured. These issues include ongoing protection of key sites, provision of natural history and historic interpretation, product marketing and pricing, and implementation of operator standards.

18.2.2 Goals and key areas of focus

18.2.2.1 Goals

- To position Samoa and the tourism industry as ready and able to ‘deliver the promise’ by professionally meeting targeted and anticipated tourism demand.
- To ensure delivery of best possible visitor experience by providing diversity of products, activities and experiences, and by encouraging and educating local industry to aspire to meet and exceed benchmark standards in product presentation, marketing, sustainable

environmental management community awareness and in complying with ethical business practice.

- To endeavour to ensure balance and quality in tourism product and services across Samoa.
- To attract investment to the sector to enable greater and diversified product development.

18.2.2.2 Key areas of focus

- Identifying tourism product, services and infrastructure needs required to meet forecast tourism demand and satisfaction expectations, uplifting capacities and diversity of supply.
- Uplifting service and training standards.
- Providing an accreditation regime, applying a system of standards and representation in the market that will ensure adherence to “truth in advertising” and enable consumers to have clarity of expectation, to be satisfied in the service and product they receive as well delivery of expected services.
- To ensure appropriate investment, building, and environmental regulatory regimes within all relevant Government agencies, industry and communities to ensure best presentation of both the built and natural environments.
- To continue to focus development throughout Samoa on the basis of “Tourism Development Areas”.

18.2.3 Strategies and plans

18.2.3.1 Style of desired tourism product

When growing tourism and developing product and facilities, it is essential to strongly reflect core community values and the key attributes of the destination. Such an approach will not only ensure the protection of existing community values and thus obtain wide spread community ownership of the tourism experience, but also provide the destination with a unique tourism offering which will be attractive to a growing market of tourists looking to immerse themselves in new experiences, environments and cultures.

Hence, tourism development should seek to embrace, convey and reflect the Samoan Experience.

This concept extends to all aspects of any tourism development and is inclusive of architectural design and presentation of the built environment, integration of cultural customs, protocols, language, patterns, colours, themes and others into every aspect of the product offering.

Community values, preferred direction of operators targeting niche and higher yield market segments, commercial and competitive realities dictate that major mass tourism (in world terms) is not a desirable or feasible option in the short or medium term for Samoa. Sustainability, long term commercial viability and social and environmental compatibility should be considered as the dominant criteria for proposed tourism product developments.

It is anticipated that Samoa will enjoy best results with the development of products and experiences strongly reflecting the themes of the Samoan Experience which:

- Demonstrate responsible sustainable ecotourism capitalising on truly pristine beaches and rainforest wilderness areas.
- Embrace the richness and uniqueness of the people and culture of Samoa.
- Preserve authenticity, have relatively low impact and relatively high yield.
- Cater to markets seeking discovery, learning, wellness and fulfilling the needs of specialist needs e.g. ecotourism, adventure, education, wilderness, cruise and fishing, surfing, indulgence and spa.

18.2.3.2 Cultural, heritage and community and ecotourism based tourism development

STA will work with local product suppliers and villages to develop tourism programs that enhance both local economic development and promote the preservation of local community culture and heritage.

Ecotourism and community based tourism offer some inherent advantages as tourism that encompasses community values and the broad distribution of benefits. It is apparent that these

forms of tourism development provide a strong basis to address many of the environmental and cultural issues relating to tourism in Samoa and can overcome some of the concerns that exist in that the benefits derived from tourism are not evenly spread throughout the community at present.

There is interest in village and community based tourism at a local level and this area is clearly one which can experience growth in the next few years. Development to date has been constrained by lack of capital and expertise in marketing, business management and product development. There is a need to develop policies and initiatives, which support the development of tourism in communities and ensure that the benefits of tourism are equitably spread.

A key to success of community based tourism projects is that the natural and cultural heritage is conserved, but at the same time the business has to be like any other. It has to have an identified market and be well managed. Successful community based tourism projects need careful planning at the local level and a program of assistance needs to be developed to support local community based tourism projects. Projects might include art and craft design, (e.g. fine mats etc) manufacture and tourists participating in learning how it is done. Local guided and interpreted tours, including marine guided and interpreted snorkelling tours and others.

Opportunities also exist to develop new experiences and activities to achieve increased visitor satisfaction. There is potential to significantly increase and improve walking, biking and horse riding tracks, resting points, interpretative signage' viewing platforms and the like in National Parks. The concept also provides the opportunity for training and employment of park ranger caretakers as interpretative tour guides. The costs and financial feasibility of possible '*user-pay*' systems of entry fees, levies and suchlike requires continuing investigation.

18.2.3.3 Tourism development areas

Previous planning and operations over the last ten years have identified broad national level issues in

which many of the constraints and pressure points facing tourism, have been specific to particular areas of the country where tourism accommodation and attractions have been developed.

It has also been the case that the majority of modern day development of tourism accommodation has occurred in seven key areas and it is likely that these areas will continue to be the focus for accommodation growth in the future. These areas inevitably cover several political districts as mentioned below.

- Apia (Vaimauga West, Central Apia, Faleata East and Faleata West)
- North Western Upolu (Faleolo, Mulifanua, Manono Uta, and Falelatai)
- South-east Upolu (Aleipata Itupa I luga, Aleipata Itupa I lalo, Lepa, Lotofaga and Falealili)
- Southern Upolu (Siumu, Safata, Salamumu, Lefaga and Falease'ela)
- Eastern Savai'i (Faasaleleaga I, Faasaleleaga II, Faasaleleaga III and Faasaleleaga IV)
- Northern Savai'i (Gagaemaua II, Gagaemaua III, Gagaifomauga I and Gagaifomauga II)
- North-west Savai'i (Alataua West, Falealupo, Vaisigano East and Vaisigano West)

Most of the villages in these areas appear to have already made a conscious decision to be involved in tourism development. Accordingly, it makes sense to support developments in these areas through the improvement of infrastructure and provision of training and impact management. This is not to say that tourism development in other areas will be restricted, but that the same level of support may not be provided.

There is a need to continue close liaison with village representatives in order to identify interest, opportunities and possible locations of tourism development. Benefits of undertaking these consultations will include:

- Allowing infrastructure and utilities providers to plan for increased capacity for these areas over the next five years.
- Providing a focus for impact management and human resource development provision.
- Facilitating more targeted marketing.
- Directing growth away from other more culturally or environmentally sensitive areas.
- Encouraging product development at established tourism areas.

Whilst these areas will provide the main focus for accommodation development, other adjacent areas are more appropriate for the development of adventure, nature and cultural tourist activities. These will need to be the focus for training in the development of such activities. Examples of adjacent 'activities areas' include:

- *Apia* - the harbour area (including Palolo Deep) for marine tourism activities, Mt Vaea and Lake Lanoto'o for adventure and nature tourism.
- *South-east Upolu* - the marine protected area and off-shore islands in the Aleipata area for marine tourism activities and Lalomanu Crater and Saleapaga cliff for adventure and nature tourism.
- *Southern Upolu* - Le Pupu-Pue National Park for adventure and nature tourism and the Safata Marine Protected Area and Saanapu-Sataoa Conservation Area for marine tourism activities.
- *Eastern Savai'i* - Vaiola-Patamea and Tafua Peninsula for nature and adventure tourism.
- *Northern Savai'i* - Saleaula Lava fields, Mt Matavanu and Falealupo Rainforest Preserve for adventure and nature activities, Manase to Fagamalo and Asau Harbour for marine activities.

There is a need to review the 'area check- lists' that were originally prepared for each area for continuing relevance and updating.

18.2.3.4 Development of “soft infrastructure” capacities

- Facilitate training of guides and interpreters and the development of commercial guiding services.
- Consider organisation of nature based events (e.g. Eco Challenge, Triathlon, reality television nature based contests or similar) which both highlight the natural positioning of the country and generate wide publicity of it. Consider also opportunities for Samoa to become a film site location for feature films.
- Develop interpretive materials in relation to places and things of interest, and continue to upgrade collateral (brochures, maps, point of sale material, etc).

18.2.3.5 Island activities

The demand for snorkelling, sunbathing and beach walks is widespread in the Pacific and indeed in Samoa but the accessibility to good beaches and snorkeling areas could be improved and should be expanded upon. Examples include the popularity of Palolo Deep Marine Reserve and beach activities, such as swimming at Aleipata. The success of dive, surf, fishing and kayaking operations are an indication of future market trends.

Given the demand for marine tourism products, it is crucial that international standards (such as the Professional Advanced Dive Instructor (PADI) certification, or the New Zealand Sea Kayak Operators standards) are applied to Samoa's marine tourism operations. At present, the application of standards is uneven within the tourism industry and in some cases standards may need to be developed. For instance, surfing tourism does not have certifiable codes of practice, but because of the very dangerous nature of unmanaged surfing in Samoa, agreed surf standards have been established and standards improved.

Opportunities for new product development include dolphin and whale watching, overnight sea kayaking, fautasi boat trips (seasonal) and outrigger canoeing.

Land-based activities on the main islands of Upolu and Savai'i are carried out either with guides, or independently. Treks to Lake Lanoto'o and visits to Mt Vaea, Piula Cave Pool, the O Le Pupu-Pue National Park, Papapapai-tai Waterfall, Tia Seu (Pulemelei) Ancient Mounds, Afu Aau Waterfalls, Alofaaga Blow-holes and Falealupo Rainforest are all currently popular activities. Continued training of tour guides and attractions managers is required.

Opportunity also exists for additional land-based activities such as interpretative tours to Mt Vaea, mountain biking tours or developing guided tours to key historic and scenic sites and for short (30 minute) walks in the rainforest on Upolu readily accessible from the main visitor circuits, e.g. Cross Island Road or the Le Mafa Pass–Aleipata circuit.

There is potential for educational tourism and further cultural tourism activities. Samoa's culture and way of life is an important part of day-to-day tourism. Where possible, visitors can be further encouraged to participate in both structured and unstructured activities such as fiafia and traditional fishing. When new products are developed, appropriate support from the STA needs to be provided.

18.2.3.6 Protected areas – scenic sites and cultural sites

Samoa has an increasing number of protected areas, some of which are also popular with visitors. In a regional context, Samoa's protected areas, scenic sites and landscape areas are significant. These areas include:

Upolu

- Mt Vaea Scenic Reserve
- Palolo Deep Marine Reserve
- Lake Lanoto'o National Park
- O Le Pupu-Pue National Park (Togitogiga)
- Saanapu – Sataoa Conservation Areas
- Uafato Rainforest Conservation Area
- Aleipata – Marine Protected Area
- Safata – Marine Protected Area.

Savai'i

- Tafua Peninsula Rainforest Reserve
- Alofa'aga Blow-holes
- Sale'aula Lavafields
- Sasina Conservation Area
- Falealupo Rainforest Reserve

All these areas have associated tourism activities and most have considerable potential for further tourism use and improved management interpretation. An example is Palolo Deep Marine Reserve where improved marketing and the provision of better public facilities could benefit Apia and Samoa tourism.

There is potential to encourage government to investigate the creation of a National Park for Savai'i's lava fields (northern slopes of Mt Silisili).

In addition to the current national and marine parks, reserves and scenic sites, Samoa has areas of special tourist interest. Whilst no specific data is available on Samoa's landscape values, there is considerable support from tourism stakeholders that key Samoa scenic views be preserved and for strengthening the Ministry of Natural Resources and Environment (MNRE) with additional resources for managing Park Tourism. Examples include:

- Falealupo Peninsula and Reserve.
- The Fagali'i to Le Mafa Pass Road – long recognised as an exceptional landscape, particularly the Le Mafa Pass (privately owned) area.
- The flanks of Mt Silisili, Savai'i.
- Small offshore islands.

These sites, if altered by development (for example placement of factories, shops, mining) would significantly detract from the current landscape values of Samoa.

The management of protected areas, including marine reserves, national parks and conservation areas place MNRE under considerable pressure. As tourism demand on these areas increases, additional resources will be required.

18.2.3.7 Accommodation

Accommodation is the single largest sector of the tourism industry in Samoa. The hotel/motel sector provides the greatest employment opportunities in the sector.

In absolute terms, however, the accommodation sector is still modest in scale. Of the multitude of establishments, only four are larger than 50 rooms. Over one-third of total capacity is in properties with less than 20 rooms.

No official hotel grading system exists, but considerable variation is to be found in the quality of hotels and the level of service provided.

No comprehensive or reliable occupancy statistics are available. While occupancy levels may exceed 70% in the larger and more frequented hotels, other sectors of the industry are reportedly much lower, frequently well below 50%. At present, there may be times of the year, for example in August/September, when accommodation is at capacity, but these periods are limited and by themselves scarcely warrant additional capacity.

The pattern of development over the last decade did not correspond to that proposed in previous planning documents which emphasised construction of high quality, small and medium-sized facilities (20–100 rooms) on the coast. However, much of the new accommodation has been either small-scale, modest, hotel or guest-house accommodation in Apia, or small fale type accommodation located elsewhere on Upolu or Savai'i.

This pattern of development reflects what the local economy and society could provide in terms of finance, available land and entrepreneurial skills, rather than a carefully considered response to market demand. A small number of large beach resort type hotels are currently well advanced in negotiation and are anticipated to be confirmed developments in 2009.

Considerable growth has also occurred in beach fale developments. There are now over several hundred beach fales in Samoa with many of them in the Aleipata district. In general, there are sufficient fales to well and truly cater for current and projected demand but many of these could be upgraded, managed and marketed better.

18.2.3.8 Tourism services (restaurants, shopping, markets, handicrafts and entertainment)

During recent years, Samoa, and in particular Apia, has seen the development of viable businesses focusing on tourism and local demand. There is now a wide range of safe, vibrant restaurants, cafes, fast food outlets and local food caterers. This diversity and quality is also reflected in the entertainment, handicrafts and shopping sector.

Within rural tourism areas, the range, understandably, is narrower. Opportunities for further development of restaurants, cafes, shopping and handicrafts exist in Apia and in the tourism development areas.

These opportunities could be in the provision of a fiafia, a handicraft store at Manase or Lalomanu or specialised casual dining with a focus on the local Apia/Samoan or international market.

There is considerable opportunity to expand the current range of Samoan arts and craft products utilising the excellent Samoan artists and crafts-people based in and outside Samoa.

The main requirements for assistance in this area is in joint marketing, assisting with technical, business management training and accessing an understanding of market needs through focused research.

18.2.3.9 Events and Conventions

Samoa has a long established reputation for organising and hosting successful events. These range from very large church functions through to the South Pacific Arts Festival (1996), the Camel Trophy (2000), major sports events, the Tattoo

Convention (2001), the annual Samoa International Game fishing Tournament, the Island Jazz Festival and the popular annual Teuila Festival.

Historically, hosting events such as the South Pacific Festival of Arts and the Teuila Festival has been the role of STA. During recent years, the private sector has played an increasing role in assisting with event management and this should be further encouraged. The Samoan International Game Fishing Festival is an example of a successful private sector-led event, with some government support that benefits tourism.

Where possible, events should provide for tourists' needs such as pre-event programmes, public transport to events (e.g. specific charter boats for fautasi races) and commentaries in English for events like the Teuila Festival. Additional events, based on popular activities could be run by the community or private sector with marketing support from STA where the tourism industry benefits. Examples include Pacific Sports events and hosting more large scale events, (e.g. endurance events along the lines of the Eco Challenge adventure race or similar).

The forthcoming convention centre to be developed in Apia, provides impetus to further develop the conventions and workshops market for both business meetings and particular events. Examples of such events could include a Pacific Surf Tourism Workshop, establishing a Samoan Food Festival either as a standalone event or in conjunction with the Teuila Festival, regional ecotourism workshops or training, regional protected areas or marine tourism workshops, a Pacific dive tourism conference, marine tourism, ecotourism or Pacific tourism research conferences or SPTO regional tourism workshops.

Workshops are often smaller (20–30 attendees) run for several days and can be held in rural areas. A Pacific Whale Watch Operators training workshop for instance, could occur at the South Coast resorts, the Savai'i hotels or the fales at Aleipata or Manase.

18.2.3.10 Apia

With the development and expansion of Apia's accommodation, restaurants, cafes, entertainment and shopping facilities, there are further opportunities to upgrade public facilities for local people and tourists.

Apia Harbour has immense appeal with its scenic values, interesting mix of historic and modern buildings, its history, vibrant markets and waterfront.

The waterfront has potential to continue the development of the nearby marina area where a number of outdoor dining restaurants have become established. There is also the opportunity to similarly focus on a quality lifestyle waterfront area at the fishing wharves and fish market area which could offer eating, boutique shopping and public spaces.

Elsewhere in Apia, public facilities (toilets, signs, footpaths, including upgrading the waterfront walkway), should be installed as general upgrading occurs. The preservation, maintenance and interpretation of historic buildings, memorials and other relevant structures are desirable and should be encouraged.

18.2.3.11 Standards facilitation

- Finalise and implement the draft standards and rating system which STA has developed.
- Facilitate education of, and encourage industry members within Samoa to:
 - Understand and respond to visitor standards expectations.
 - Constantly improve service delivery standards.
 - Conform to the destination's expectation in reinforcing Samoa's image as a warm and friendly destination.
 - Develop, instil and implement common and coordinated marketing themes.
 - Reinforce and improve sales techniques, knowledge of distribution channels and pricing techniques.
 - Ensure the provision of ethical business practices.

- Convene annual Samoa Tourism Exchange (STE) conference as a forum for continuing improvement in the development of Tourism for Samoa.
- Facilitate delivery of education opportunities through various methods including:
 - Newsletter articles
 - Seminars
 - Workshops
 - Publicity.
- Provide access to a reference and support materials library via website.
- Promote and encourage community reinforcement of Samoa's image, service delivery expectations and common marketing themes.
- Endorse standards development benchmarks and requirements of recognised industry bodies and professional tourism organisations.
- Encourage relevant tourism businesses to aspire to international eco tourism accreditation standards.
- Promote the accreditation of products as "eco tourism" and identify their accreditation in relevant promotional materials.

18.2.3.12 Infrastructure

Increasing tourism visitation not only requires the provision of specialist tourism products, experiences, accommodation and services but also brings a proportionate increasing demand on basic community infrastructure and services like water, sewerage, power, public transport and medical services. Therefore, infrastructure capacity planning and development activities in each area that attracts reasonable levels of tourism visitation, needs to incorporate long-term vision and forecasts of anticipated visitor numbers and length of stay to ensure tourism is not a drain on these essential community infrastructure.

There is some difference in levels of both basic public infrastructure and utilities and tourism infrastructure between the different areas within Samoa and accordingly there will be some differing

rates of progression for tourism development between communities.

There is also a need to provide infrastructural support for existing and potential points of attraction for example in National Parks. Where possible and practical, the design and ‘look and feel’ of tourist infrastructure should reflect a strong Samoan character in keeping with the style and character of Samoan culture and heritage and established and proposed ‘brand’ elements.

18.3 Resource management

18.3.1 Introduction



The conservation and enhancement of Samoa's natural environment and biodiversity is fundamental to the sustainable development of all economic sectors, especially tourism. Potentially, all areas of the natural and built environments are under threat from competing resource use. These include increasing visitor traffic, fishing and sand mining in resort areas and urban development in protected areas and mangroves. Unless these threats are adequately and collectively addressed, general quality of life as well as quality of the tourism product can be seriously reduced.

Addressing these issues will necessarily involve a collective effort by communities, landowners and custodians, developers, STA, and other government departments, agencies and NGOs. Critical areas to be considered are the environment, planning and development, sites and landscapes, land and forest resources, marine and especially reef resources, waste management and water quality and efficiency of usage.

18.3.2 Goals and key areas of focus

18.3.2.1 Goal

- To sustainably manage all resources

18.3.2.2 Key Areas of Focus

Planning and development

Historically, planning and development both for tourism and other purposes tended to be rather *ad hoc* and lacking coordination both between government departments and also between sectors. This situation has seen some significant improvements in recent years particularly with the advent of the Planning and Urban Management Agency of MNRE.

Without proper community awareness, support and participation and appropriate planning legislation, landowners and custodians can build with little regard to the viability of the business venture, the effects on the landscapes, villages or coastal hazards. There are a number of cases of tourism facilities being constructed in inappropriate locations as well as excessive development for very short-term events or festivals, especially beach fale developments which have not always been subject to formal development controls. This situation is complicated by customary land ownership and strong cultural associations with the land.

Greater public awareness of planning needs to be combined with tighter development controls through the business licensing regimes to help owners and operators ensure their proposals for extensions or new developments are environmentally and socially sound. Development proposals for the coastal area need to be consistent with the recommendations and requirements of MNRE and other resource management and planning bodies. This is particularly important given the planned increase in larger accommodation properties with a focus on coastal areas. This can be addressed with compliance with Environmental Impact Assessment (EIA) requirements and encouraging existing operators to undertake environmental reviews of their businesses.

Sites and landscapes

Samoa has a number of attractive scenic and cultural sites, historic buildings, protected areas and landscapes that form an essential part of its cultural heritage and tourism product.

If tourism sites and landscapes are adversely affected by conflicting land uses, there will be a decline in the quality of the tourism product and visitor experience. This is even more so, given the product development strategy will put further stresses on utilisation of these resources.

In addition to existing tourism scenic sites, conservation areas, rainforest preserves and other protected areas, there are also a number of areas that have particular 'landscape value'. Earlier

assessments highlighted particular areas that need protection. These include:

- The East Coast Road from Fagali'i to Le Mafa Pass
- The upper slopes of Mt SiliSili in Savai'i
- Small off-shore islands

The ongoing protection and management of key protected and conservation areas, scenic and landscape sites are crucial to the future of sustainable tourism in Samoa.

Such key sites and landscapes need to be identified. The historic, cultural or environmental significance and protection of the areas need to be discussed with responsible communities, owners and custodians.

Land and forest resources

The exploitation of land and forest resources has in the past far exceeded sustainable yields in many areas in Samoa. Deforestation has been considered one of the most serious environmental issues. The matter also has numerous downstream effects such as loss of medicinal plants, food security, wildlife habitat and recreational resources.

Tourism has been proven to encourage village participation in conservation by providing an economic reason to conserve resources. At the moment, however, nature tourism products in existing conservation areas and protected reserves are rather undeveloped, poorly managed and as a result, under-utilised.

Conservation areas and their staff or custodians need continuing assistance in the development of attractive, safe and environmentally sound income-generating nature tourism products through training, access to assistance, support and advisory services.

Marine resources

The marine environment is one of the main attractions of visiting Samoa. Surfing, snorkeling, diving and enjoying a clean and well-managed beach and coastal environment is central to visitor satisfaction. A combination of unsustainable fishing practices, siltation, pollution, increasing water

temperatures, invasive species and cyclones has in the past led to a decline in the quality of coral reefs. Whilst tourism generates economic benefits to some of these areas, at particular pressure points, it has been found to result in deterioration in the quality of coral reefs from surf and dive boat anchors and tourist trampling (e.g. Palolo Deep Marine Reserve and Lalomanu).

Tourism opportunities in MPAs need to be assessed and further developed. Mitigation strategies for particular tourism pressure points on coral reefs and the marine environment need to be undertaken, so that the economic potential for the sustainable use of these areas can be expanded and fully realised.

Waste and pollution

Rapid urbanisation in Samoa has increased the number of septic tanks located in low-lying areas where the likelihood of leakage into ground water is highest. Greater demand for imported goods has also increased the volume of non-biodegradable solid wastes in towns and villages, putting pressure on limited landfill sites and resulting in an increase in visible littering.

It is crucial that operator awareness of waste management and pollution control on tourist sites is increased and that operators are supported in upgrading and improving their existing facilities. In the context of new tourist accommodation development, proper controls and standards, EIAs and environmental audits are required.

Water quality and efficiency of usage

Some problems persist with both water quality and quantity in Samoa. Consequently, these may present serious risks to both tourist and village health and safety.

Increasing tourism visitation and new tourism developments will only add further demand pressures, on what is already a valuable resource with supply limitations. There is a need to encourage all existing and new hotel developments to integrate water-saving technologies and encourage the use of rainwater tanks where possible. This can be addressed by development of planning approval

requirements and processes as well as by increasing overall environmental awareness and training on an ongoing basis.

Tourism and culture

Particular care needs to be taken to minimise any adverse impacts on the quality of life and to the Fa'a-Samoa. Particular sensitivities include tourist dress, behaviour and respect for Sunday and the evening curfew. Another related concern is the uncontrolled increase in the number of beach fale developments.

To reduce negative cultural impacts and minimise the disturbance caused to village lifestyles, in addition to the community tourism awareness programs, there is also a need for educating tourists about village protocol. This might be achieved through the production of a pre-arrival video (for airlines and cruise ships) and strengthening of visitor information, particularly through inclusion within websites, travel books, guides and visiting journalists and media kits.

Performing arts and crafts

Performing arts and crafts are a central element of the Fa'a-Samoa and a great attraction for visitors to the country. *Fiafia* is an integral element of most hotel entertainment programs and few tourists return home without a few local handicrafts as souvenirs. This provides an important part of the tourist's Samoan Experience as well as potentially significant economic contribution. It is therefore vital for Samoa to ensure that there is no reduction in authenticity and quality of arts and crafts, as has happened in other destinations particularly with the importation of low cost replicas. This issue needs to be addressed through training and awareness.

18.4 Access

18.4.1 Introduction



Adequate air and sea transport facilities enable the efficient flow of visitors to and from a destination, and is a key consideration in the consumer

travel decision making process. Aviation access is critical to the growth of tourism in Samoa.

Air New Zealand and Air Pacific continuously support air travel between Samoa and other destinations. The emergence of Polynesian Blue Airline has assisted the industry with the provision of more flights to New Zealand and particularly Australia. This new venture has encouraged healthy competition which has benefited the industry with lower airfares, increased direct access and connectivity. Other carriers include South Pacific Express and Inter -Island Airways which are servicing the American Samoa route.

Currently carrying capacity is certainly sufficient to cater for current demand, but it must be noted that during peak season, particularly over the Christmas break when it is traditional to see a spike in VFR markets segment, there will be occasions when supply is inadequate and the yield management practices of the airlines will see the fares vary and increase significantly.

In the current era of dramatic instability within the aviation sector and the emergence of low cost carriers and point to point routing, significant opportunities and risks arise for Samoa. It is imperative that Samoa work with the airlines in order to ensure sustainability and continuation of possible growth in service capacities and frequencies.

There are '*Open skies*' air service agreements with Australia and New Zealand. All other relevant air services agreements are also in place including US, Singapore, Dubai, Tonga, Niue, Fiji, Tuvalu, and Kiribati. All agreements are open and not restrictive.

Polynesian Airlines no longer operates domestic services between Apia and Savai'i. However, these services will be of interest not only to visitors but also to efforts in developing Savai'i as a destination on its own. It is however questionable, as to whether there is sufficient demand to justify the economical viability of services.

Apia provides good seaport facilities and enjoys a good existing base of visitation to build upon. Eleven cruises visited Samoa in the June to December 2008 season. Cruise companies have indicated strong market interest and it is anticipated that growth will occur in this segment. SPA is forecasting 30% growth in cruise shipping in the 2009 season alone. SPA is now also actively promoting other parts of the islands for cruise stops as well as Apia.

Cruise ships have now also commenced visits to Savai'i with the first visit taking place in 2008. A limitation here is that Salelologa can only accommodate small cruise ships of 100 meters or less.

Samoa operates a ferry service to American Samoa (80 km from Apia) on a twice-weekly basis. Three daily return services operate between Upolu and Savai'i from Mulifanua and Salelologa.

Local and international visitors have expressed interest in an upgrade of the ferry service. An upgrade could involve improvements to the upper deck and different fare categories. There is also a need to improve facilities for people with special needs.

A fast ferry service between Apia and Salelologa could also be investigated. A similar service initiated a decade ago foundered due to economic conditions, poor visitor numbers (probably less than a quarter of Savai'i's current visitor numbers) and perceived poor ferry design. The viability of a fast ferry to Savai'i will increase with rising interest in Savai'i as a destination.

Of Samoa's eight outlying islands, two currently receive regular visitors, Namu'a Island off Aleipata and Manono Island. Both are serviced by small boats. Opportunities exist for improving the safety and operational standards of these small ferries and expanding the services.

The international yacht market in the South Pacific, though small (less than 3,000 yachts per year in the Central Pacific) has potential for Apia.

Estimates in 2006 indicated Samoa had about 200 yachts visiting a year. Samoa's southern neighbours, Tonga, Fiji and Niue all have a solid base of yacht traffic. Those estimates also indicated that about 800 yachts a year visit Tonga, mainly to Vava'u, under 1,000 yachts visit Fiji and about 250 yachts for Niue (about a third of their total visitors 1,600 per year). The yachts tend to move east to west, Tahiti to New Caledonia via Tonga and Fiji during the winter.

The yachting market's requirements are reasonably simple. A good port, mooring, fuel, water, food and security for shore visits. In response to the opportunity to further develop and appeal to this market segment, marina facilities have been developed in Apia Harbour.

18.4.2 Goals and key areas of focus

18.4.2.1 Goals

- To build visitation to ensure airline route sustainability and the continuation of possible growth in service capacities and frequencies.
- To grow cruise ship and yachting visitation and yield.
- To build improved connectivity from source markets and within Samoa as a destination.

18.4.2.2 Key areas of focus

- To build partnerships with airline operators.
- To preserve and build enhanced connectivity to Asian and long haul markets.
- To encourage air / land content packages.
- To investigate opportunities to attract charter series.

- To build better regional inter island connectivity.
- Ensure airport and port facilities meet international facility and safety standards.
- To build greater domestic connectivity.
- To build partnerships with cruise ship operators.
- To review and assess Government taxes, charges and imposts in the context of the competitive environment.

18.4.3 Strategies and plans

- To establish an aviation working group to proactively lead strategy development and examine potential for new and / or increased air services.
- To educate, encourage and facilitate tourism industry operators to negotiate cost effective transport, accommodation, tour packages with airline operators to achieve transport cost savings that can be passed through to consumers which in turn will drive increased visitation.
- To assist in airline route development proposals for consideration by airlines and if appropriate, implement an Aviation Route Development Assistance Plan to provide incentives for attracting new airline services.
- To also consider potential for driving increased demand and loadings by creatively utilising code share, international alliance and frequent flyer reward programs and others.
- To investigate opportunities to attract charter flights in order to boost visitation and to also establish a foothold in target emerging markets. Such charters could be organised to coincide with strategic holiday periods e.g. Golden Week in Japan and Chinese New Year out of Hong Kong and mainland China.
- To re-open Fagali'i airport to be operated by Polynesian Airlines in better serving the American Samoa route.
- Consider feasibility of servicing the two airports on Savai'i.
- To maintain airport facility standards in accordance with international standards and

with the accreditation requirements of annual auditing agencies such as FAA, IATA, ICAO and PARSO

- Cruise ship working group to continue to lead strategy development and to facilitate additional cruise shipping services through the identification and targeting of potential operators and proactive marketing program.
- To investigate and consider in the context of the competitive environment, Government led initiatives with potential to increase visitation and therefore aircraft and cruise ship loadings and route viability by improving costs competitiveness. Specifically, these might include:
 - Regulation of airfares
 - Removal or reduction of the taxes and other statutory imposts on airfares
 - Route subsidisation
 - Subsidisation of fuel to reduce airfares
- To investigate feasibility of fast ferry service to Salelologa and to upgrade safety measures in relation to all ferry services.

18.5 Tourism capacity building and workforce development

18.5.1 Introduction



Central to the success of a tourist destination is the ability to deliver all elements of the promised tourism experience. It is not enough to have great

tourism attractions, products and accommodation, it is essential these be backed up by quality and friendly service in all facets of the tourism experience.

The level of service supplied is a key determinant of the markets that can be attracted to a destination. The beach and rainforest wilderness, adventure and ecotourism experiences that Samoa offers and might potentially offer, need to at all times be backed up by quality and friendly service that reflects the Samoan culture and hospitality.

Many established tourism operators have developed reasonably high levels of skills and success in their operations. However, the availability of additional local 'on the ground' tourism skills and competencies, is at present, extremely limited. Skills shortages continue to be a major issue for existing businesses and there are concerns that new tourism developments might drain personnel.

Only limited relevant training capacities are available, although the new APTC training facilities commenced operations in 2008 and have already provided very positive impact in some areas. Training focus in recent years has been at relatively basic levels with focus particularly towards beach fale operators and other small scale operations. The emphasis of these trainings and awareness programs has been on:

- Customer Service and Public Relations
- Cookery
- Pricings and Costings
- House Keeping
- Developing Middle Management Skills on Tourism Operations and Management

- Developing Tourism Marketing Skills for the Management and Owners of operations
- Developing Up-selling skills for staff
- Disaster Awareness for Operators
- Fire Safety Drills for Operations
- Tourists safety in villages

Employers experience difficulty in releasing staff for the time necessary to attend courses.

Tourism development in Samoa requires a strong focus on capacity building across all the diverse range of skills required in the industry. This ranges from basic competencies in hospitality and service, guiding, environmental and cultural heritage interpretation skills, visitor health and safety, managing people with special needs to business development and management. Training in higher vocational areas of business and financial management, visitor administration and management is also critical but has limited availability at present.

Local tourism operators will also benefit from regular industry workshops on issues such as media training, wholesale packaging, web-based marketing and integration with mainstream marketing.

Local wage rates for skilled workers are very low by world standards. Already, sparse skills are further depleted by virtue of migration of skilled workers to other destinations (NZ and Australia) where they can derive higher rates of pay.

18.5.2 Goals and key areas of focus

18.5.2.1 Goal

- To facilitate training and quality education programs which meet industry needs and enable application of standards and accreditation to tourism products and services that meet international benchmarks and visitor expectations.

18.5.2.2 Key areas of focus

- To improve skill levels.

- To improve the coordination of training between stakeholders including government, the industry and training providers.
- Ensure that training and education are responsive to the needs of the industry.
- Create greater awareness of the tourism sector at all levels including villages, resource owners and youth and to increase awareness of the benefits of tourism.
- Improve the quality of tourism training and increase opportunities for accessing training on a full and part time basis.
- Upgrade the capacity of existing tourism and hospitality training institutions.
- To maintain communications systems to keep industry members, Government agencies and the community fully informed about training and business improvement opportunities.

18.5.3 Strategies and plans

18.5.3.1 Train-the-trainer

Occupational training is the ongoing issue for an industry where the majority of entrants have no previous experience or training in any aspects of the service industry. Rurally located hotels typically recruit staff from nearby villages, so the training emphasis tends to be on-the-job.

In the past, the STA and NUS have provided workshops and short courses to up-skill tourism staff at a variety of levels. However, these have generally had low participation rates as it is often difficult for employers in small businesses in rural locations to release their staff to attend such workshops.

Another option has been to provide on-site training for individual businesses. Whilst these have been popular, it has also been mentioned that with a lack of supervisory and managerial level support, trained staff soon return to old habits. Another consideration is that outside trainers often encounter language and cultural difficulties and some tourism businesses actually seem to prefer to train their own staff.

The 'train-the-trainer' program should focus on training supervisors and managers to transfer skills

to their staff, enhance motivation and build team spirit. This program should be supported by the development of appropriate training materials.

18.5.3.2 Advisory services

Small and medium sized tourism businesses (SMEs) form the backbone of tourism development in Samoa and make a significant contribution to the economic impact of the industry. Many of these are owner-operated and some owners may not have had access to formal tourism training and have difficulty in absenting themselves from the business.

In order to enable Samoans to maintain the high level of local ownership of the industry that has been apparent to date, it is crucial that this group is supported with appropriate technical and also business training opportunities.

The Small Business Enterprise Centre (SBEC) currently provides business advice for tourism businesses including accounting and book-keeping, marketing, writing business plans and undertaking feasibility studies. To qualify for assistance, participants in the program undergo a week long training program and prepare a business plan for their business.

The need for training though extends well beyond business start ups. There is opportunity to develop an ongoing business mentoring scheme which will not only assist business operators in building and sustaining their businesses, but will also be of assistance to them in handling individual issues as and when they arise.

18.5.3.3 Workshop-based training

In addition to the SMEs there are also a large number of community and family-run tourism businesses including beach fales, attraction sites, nature guides and handicraft producers.

It is not envisaged that significant growth will be needed in the number of people working at beach fales, but there is clearly a need to provide additional training for existing beach fale managers. In contrast,

there will be a demand for more activities, attractions, handicrafts and other add-on products and services to tourists while they are at their accommodation.

STA will continue to facilitate training providers to provide short workshop-based training and manuals. Specific emphasis should be given to particular skill areas such as marketing, food and menu preparation and safety issues and extended to handicraft producers. Workshops will be primarily held in tourism development areas.

18.5.3.4 Tourism awareness programs

For tourism in Samoa to be truly successful, it is imperative that the aspirations and the direction of the sector be clearly understood, embraced and supported by the whole community. STA and other agencies have over many years conducted a number of tourism awareness programs and it is important that the messages of these programs continue to be heard and understood.

It is particularly important that the whole destination understand and support the core themes of what it is that makes the destination truly unique and appealing to visitors i.e. the Samoan Experience and to ensure product presentation, promotional activities and visitor experience that is compatible and consistent with this concept.

18.5.3.5 Vocational training

Significant improvements have been made to vocational training capacities by developments at NUS and the establishment of the APTC which is now offering Australian qualifications in:

- Tourism operations
- Hospitality operations
- Commercial cookery
- Competency based training in 'train the trainer' programs

The APTC facilities now extend to Certificate III level and in so doing have opened a significant avenue for higher learning and career path development beyond the Certificate I entry level.

The first completed year of operations has demonstrated the need to extend the type and number of courses available to include:

- Shorter courses in the character of Gap Filling that do not require a full 6 month semester to undertake.
- On-site training tailored to the needs of specific properties.
- Formal courses in tour guiding and interpretation.

18.5.3.6 Managerial-level training

Seek to develop specialised training services and opportunities in tourism business management. These might be compiled as a range of different services including, inclusion in structured curricula of formal education programs or less structured periodic workshops, training and business improvement seminars, occasional lectures and guest speakers and suchlike.

Consider examining opportunities and mechanisms for better and more use of overseas study tours, scholarships and internships.

18.5.3.7 Communication

Ensure strong communication channels that enable all stakeholders to be constantly fully informed as to training and business improvement opportunities, vacancies, workshop dates and locations.

Also seek to facilitate industry networking opportunities where operators are able to share and learn from each other's experiences.

18.6 Land, business and investment

18.6.1 Introduction



Land tenure is a complex and critical issue for investors contemplating new development activity in Samoa. Customary land ownership is complex and deeply embedded in the Samoan culture. Traditionally, ownership of land has provided a lasting safety net for communities.

With the majority (over 80%) of Samoan land in customary ownership, access to land by individual investors and for public use is a time consuming and difficult process. Customary lands cannot be bought or sold and remains a part of the community. Reaching agreement with a wide range of owners for a development project is often impossible.

Samoa Land Corporation, a commercial arm of government, holds 24,000 acres of freehold land, 14,000 acres on Upolu and 10,000 acres on Savai'i, 4,000 acres of which, is to be set aside as a reserve. Remaining land is held as available for sale or lease.

Over recent years, Samoa has developed a broad base of small to medium sized tourism businesses. Businesses directly involved in tourism include accommodation, airlines, travel agencies, restaurants, activity operators, plus rental cars, banks and supporting businesses. By far the majority are owned locally, in strong contrast to Samoa's neighbours Tonga, Fiji and the Cook Islands.

The high rate of Samoan owned businesses offers the country a significant marketing edge because it can offer a truly Samoan Experience. Few non Samoans are involved within the accommodation sector, a reflection of Samoan land ownership and tenure systems.

Development of a number of tourism targeted hotels, beach fales, restaurants and cafes has often been without detailed feasibility assessment or planning. Some developments also suffer from undercapitalisation, insufficient market research, and

indeed very limited, if any, pre-opening marketing, and lack of a broad base of management skills. Demands from church, family and the community often compound financial constraints. Collectively, these matters give rise to concerns as to the longer term business sustainability.

Whilst investment for the smaller hotel developments has and will continue to come from local investors, there continues to be a need to facilitate foreign investment for larger properties.

With similar practices in other South Pacific countries, Samoa has implemented a generous suite of investment attraction incentives. This suite of incentives is currently subject to revision in order to better define the extent of application so that investors might have absolute clarity as to their application and entitlements.

18.6.2 Goals and key areas of focus

18.6.2.1 Goal

- To attract appropriate investment to the sector to enable development of greater and more diversified and sustainable products and visitor services.

18.6.2.2 Key Areas of Focus

- Identifying infrastructure needs, new product opportunities, sourcing appropriate Government funds and procuring investors and investment capital.
- To develop a structured investment attraction plan and facilitate investment growth in the sector by application of competitive investment incentive programs.

18.6.3 Strategies and plans

18.6.3.1 Tourism business licensing

A tourism business registration system and process will be established in accordance with the proposed Tourism Development Act. The system will act on a number of tiers:

The proposed law establishes tourism businesses which includes any business in the nature of a hotel, motel, guesthouse, in-bound tour operator, tourist boat operator or charterer, tourist bus operator, rental car operator or travel agency.

Arrangements will be made between STA and the Ministry of Revenue in regard to the process for licensing of tourism businesses. The purpose of this is to ensure standards are met by operators which will provide an effective regulatory basis for the tourism industry.

18.6.3.2 Tourism business accreditation scheme

A separate and essentially voluntary scheme of registration of tourism businesses will be established to facilitate the effective involvement of registered businesses in the management and development of the industry. This will permit STA to maintain records of all businesses which are active in the sector and to formulate arrangements under the Act to regulate them in an appropriate manner and facilitate their involvement in the management of the tourism sector.

Tourism businesses choosing to meet the accreditation and business registration criteria and become registered, will be endorsed and entitled to use of the designation of “Accredited Tourism Business”. Only accredited businesses will be endorsed and entitled. It is anticipated that this system will create a very real point of product differentiation in the market place and will therefore be capable of delivering real value to those businesses choosing to register.

Tourism businesses which meet the required standards approved to apply to any scheme of ratings may promote its business by reference to the approved rating, or by reference to the approved accreditation. STA, or an approved industry association or recognised international tourism body, may enter into agreements with tourism businesses which have been assessed to meet required standards, to permit the use and display of approved brand-marks to indicate the approved rating or accreditation.

Any tourism business which makes use of an approved rating or accreditation must permit inspections to be undertaken in accordance with the powers given to STA under the new law. The right to promote a tourism business by use of an approved rating or accreditation may be withdrawn by the Authority or an approved industry association or recognised international tourism body, if it is satisfied that the tourism business no longer meets the applicable standards or requirements.

Criteria for accreditation will be on two alternative levels:

- STA may approve and endorse pre-existing systems of ratings and documented standards applying to tourism businesses as established and required by Tourism industry organisations or similar bodies who STA formally recognises as an appropriate body to prescribe and administer ratings and standards schemes. Tourism businesses registered with these bodies will be entitled to registration as “Accredited Tourism Business”.
- Businesses not being accredited with pre-endorsed industry organisation ratings and standards schemes will have the option of becoming registered by meeting the STA independent ratings and standards criteria.

18.6.3.3 Investment and investment incentives

Sustainable growth in the tourism industry in Samoa will require investment from both domestic and overseas businesses. It is widely accepted that sustained economic growth depends upon a dynamic private sector that creates employment and income opportunities thereby increasing the nation's prosperity.

The development of the tourism sector relies upon investment by the private sector in accommodation, tours, transport and a whole range of associated activities.

The role of Government is to develop and maintain long-term strategies and create an environment

conducive to attracting investment from both domestic and overseas entrepreneurs looking to create business opportunities.

Ease of process should extend from new business start-ups, business registration, licensing, availability of and eligibility for taxation and other financial incentives through to negotiating with land owners, taxes and enforcement of contracts.

Samoa is competing with other countries to attract international investment and to retain and generate domestic investment. Tourism is by its nature a high-risk investment as external and internal factors can have a negative impact upon future demand. The market can be fickle and delivery of the product is complex because it consists of many components. Because of this, investors tend to expect a relatively high return compared to real estate or other relatively secure forms of investment.

For this to occur in Samoa, attractive and effective mechanisms must be in place to encourage investment and to facilitate carrying on business through transparent and streamlined procedures and regulations that create certainty, minimise risk, and give comfort as to security of investment.

Incentives for investment presently in place are available from the Ministry of Commerce Industry and Labour and the Ministry of Finance.

18.6.3.4 Tourism investment tax credit

(Note that this section expired on the 30th of June 2008. but is anticipated to be extended effective second quarter 2009).

The Tourism and Hotel Development Incentives Act 2003 allows that any person who invests \$100,000 or more in an Approved Tourism Development shall be allowed a credit against income tax, payable in respect of the person's income at the rate of 100% of the investment.

Key matters relevant to this incentive are:

- An approved Tourism Development is a tourism development which provides first class

hotel accommodation in Samoa as approved by the Minister of Finance acting on the advice of the Cabinet.

- Any credit may only be claimed against income in the year or years approved by the Commissioner.
- Any qualifying investment must be held for a period of at least 5 years in a form approved in writing by the Minister of Finance.
- Where an investment is not held for at least 5 years, any credit shall be cancelled and the person shall be liable for income tax as if no credit applied.
- Where a credit is cancelled the Commissioner shall assess or reassess, as the case may require, the person's tax liability.

18.6.3.5 Exempt hotel income

The Income Tax Act provides for exemption from Income tax for a specified number of years linked to the scale of investment, as follows.

- An exemption from income tax for the taxable income (after deduction of all losses carried forward) derived from the operation of a Hotel may be granted as follows:
 - Category 1 Hotel – exemption for 5 years following the capital investment
 - Category 2 Hotel – exemption for 10 years following the capital investment
 - Category 3 Hotel – exemption for 15 years following the capital investment

Key matters relevant to this incentive are:

- Definition of categories of hotels:
 - “Category 1 Hotel” means a hotel providing first class accommodation and facilities which is approved by the Minister, where the capital investment in the hotel is over \$1 million and up to and including \$3 million.
 - “Category 2 Hotel” means a hotel providing first class accommodation and facilities which is approved by the Minister, where the capital investment in the hotel is over \$3 million and up to and including \$20 million.

- “Category 3 Hotel” means a hotel providing first class accommodation and facilities which is approved by the Minister, where the capital investment in the hotel is over \$20 million.
- The capital investment must be held in a form and for a period approved in writing by the Minister of Finance.

18.6.3.6 Exemptions from customs for certain goods purchased

(Currently in process, anticipated enactment early 2009)

A new section 163A of the Customs Act provides for exemptions from customs for certain goods purchased and imported for approved tourism projects.

Key matters relevant to this incentive are:

- Exemption from duty may be granted for approved goods imported into Samoa in respect of a qualifying project.
- “Approved goods” means goods used in relation to a qualifying project where the goods have been approved for the purposes of this section by the Chief Executive Officer of the Ministry of Finance in accordance with criteria prescribed in regulations.
- “Qualifying project” means a hotel or other development approved by the Minister of Finance, acting on the advice of Cabinet in accordance with criteria prescribed in regulations.
- Exemption from duty may only be granted in accordance with criteria prescribed in regulations and may be granted in whole or in part in such circumstances and subject to such conditions and restrictions as are prescribed.
- Regulations may provide for the forfeiture of goods to the Government and for the creation of offences punishable by a fine of up to 500 penalty units or imprisonment for 1 year, or both.

The Hotel Development Import Duty Drawback previously available under the Customs Act was repealed in 2007 and no longer has application.

18.6.3.7 Integrated tourism investment attraction program

Consider undertaking an Integrated Tourism Investment which actively seeks out potential investors by developing and promoting a portfolio of prospects of potential tourism opportunities in Samoa.

Program which has core components:

- Identify possible tourism development and business opportunities where there are credible local sponsors.
- Undertake pre-feasibility study on each identified opportunity which assesses possible acceptance in the market and likely financial feasibility, also identifying all processes and issues to be managed in taking the project forward.
- Preparing project profile in the form of an information memorandum.
- Target possibly interested investors and promote accordingly.
- Projects of potential national significance might additionally be pre-prepared in such a manner so as to facilitate ease of development and implementation. Matters in this regard could include attention to all matters of compliance such as environmental impact assessments and other requirements necessary to acquire development approvals and so on.

18.7 Research, planning and impact management

18.7.1 Introduction



Tourism markets are extremely dynamic and external influences are extremely frequent and fluid.

Effective and efficient tourism development is

therefore significantly dependant on well researched, soundly based market monitoring, together with detailed ongoing demographic, psychographic and behavioural research.

Tourism research capabilities available with regard to tourism in Samoa in recent years have been very limited. This situation has been considerably enhanced with the re-establishment in 2008 by STA of its Research and Statistics division.

With only limited detailed research available, tourism development has to some extent depended largely upon anecdotal intelligence of existing tour operators and others. There is a need to build a greater robustness into the sector by further developing a continuing reliable data collection, collation, analysis, and interpretive system.

18.7.2 Goals and key areas of focus

18.7.2.1 Goals

- To enable Government and private sector tourism management and planning to be undertaken and implemented with the benefit of information that is:
 - Comprehensive
 - Reliable
 - Accurate
 - Meaningful
 - Relevant and up-to-date.
- To enable careful monitoring of all impacts and consequences and to respond as might be required.

18.7.2.2 Key areas of focus

- To constantly ascertain and monitor research data needs.
- To identify and establish partnering arrangements with relevant data collection and collation sources and government and other research facilities.
- To have input in-to, and draw upon research studies and reports commissioned by or available to SPTO, PATA, and other relevant and cooperative bodies.
- To monitor and report against Samoa's sustainable tourism indicators.
-

18.7.3 Strategies and plans

- To resource a Tourism Research Division within STA with:

18.7.3.1 Functions and responsibilities:

- Collaboration with all relevant Government departments and agencies to ensure design and establishment of systems providing comprehensive and meaningful data capture, and accurate and timely reporting. Particular data requirements will include:
 - Visitor numbers
 - Visitor origins
 - Visitor travel patterns
 - Visitor expenditure patterns
 - Visitor attitudes
 - Tourism employment
- Design and implementation of recommendations for mandatory regulations for supply and collection of data.
- Cataloguing of available tourism assets and natural heritage attractions and identification of actual and potential benefits and constraints in bringing these assets to economically viable and marketable form.
- Ongoing monitoring of national and international industry trends and market performance.
- Design and implementation of a tourism forecasting model with specific focus directed towards forecasting regional accommodation and infrastructural needs.

- Conducting market and market segmentation research.
- Tracking effectiveness of market specific marketing media, publications and outlets.
- Assessment of marketing strategy impact.
- Monitoring and cataloguing of marketing outlets and agencies.
- Assessment of economic, social and environmental impacts of tourism.
- Ongoing monitoring of Samoa's sustainable tourism indicators, interpreting results in order to determine appropriate strategic responses.
- Assessment of training and workplace requirements.
- Obtaining and assessing relevance of external (international) research undertaken.
- Establishment of a research library.
- Dissemination of information.
- Investigate the possibility of setting up a tourism satellite accounting system for Samoa.

18.7.3.2 Administrative requirements:

- To ensure and assure absolute confidentiality of industry submitted commercially sensitive information.
- To ensure Research and Statistics division representation in redesign of arrivals and departures and other bureaucracy source documentation, collection and collation systems.

18.8 Institutions and industry framework

18.8.1 Introduction



The success of tourism hinges on partnership:

- Government, through STA is lead agency in the development of tourism in Samoa and provides strong

leadership, direction, communication and coordination of Government agencies.

- Ultimately, private sector business is the main economic driver, providing the investment in product and creating opportunities. Private sector tourism industry associations like SHA are key players by ensuring strong industry leadership, communication, representation and coordination.
- Public and private sectors need to work together to achieve the best outcomes for the community.
- A partnership relationship between the Government, communities and the private sector must be cultivated in order to ensure most effective and efficient development and future management and regulation of the tourism sector in Samoa through:
 - Strong leadership
 - Unity of purpose and direction
 - A structured framework
 - Resource utilisation efficiencies
 - Unity of commitment to sustainable practices

Partnership implies mutual respect and understanding. In this regard, it is essential that government, the private sector and other regional and industry organisations create and maintain open channels of communication. This encourages all members of the partnership to facilitate common objectives and actions that reflect the vision for the region's tourism development.

By fostering partnerships, the dynamic nature of tourism can be more effectively addressed and the framework for community participation enhanced.

Sustained tourism growth requires an ongoing process involving seven essential elements, known as the 7C's:

- Consultation
- Communication
- Co-operation
- Co-ordination
- Cohesion
- Commitment
- Continuity

Key operating principles fundamental for the future are:

- The industry structural framework must be able to stand the test of time and changes in personalities.
- There will never be enough resources to do all that needs to be done and can never all be done all at once.
- There is a need therefore, to ensure that the things that most need to be done are the things that get prioritised and actually done.
- There is a need also to effect leverage. Focus should be given to 'facilitating things to happen'. It is not so much what we do but what we cause to happen.
- There is need to be strategic and to focus energies on where best results can be achieved (best bang for buck).
- There is strength in unity and collaboration.

Operational philosophy is to provide leadership, to establish partnerships, linkages and relationships, and to ensure all operational activities are primarily focussed towards facilitation and leverage. Emphasis is on exerting influence, and 'causing' desired outcomes to be achieved.

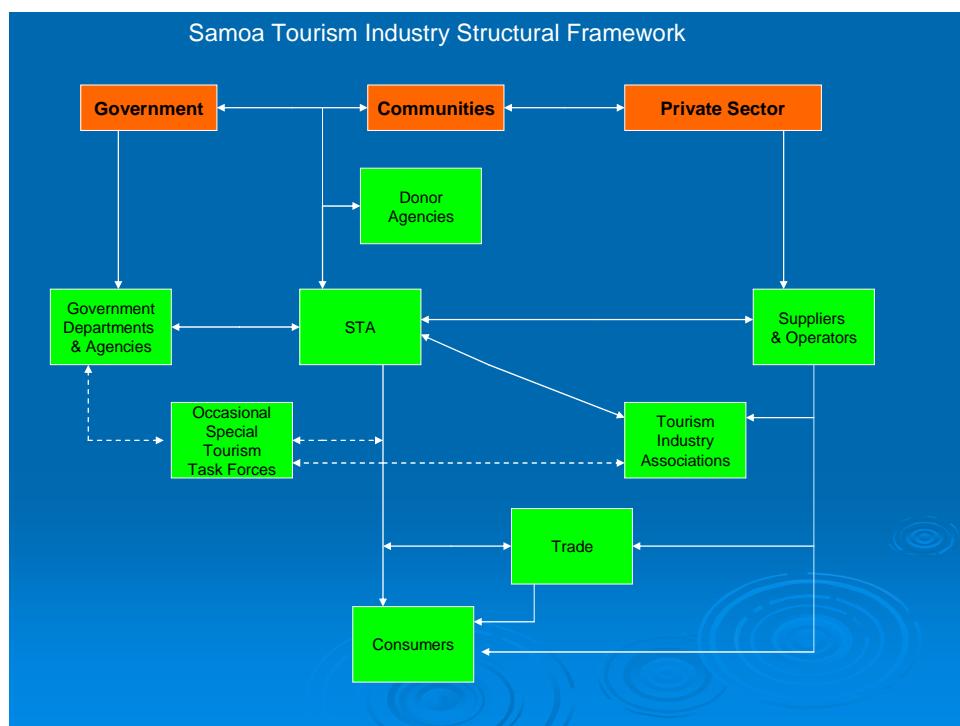
Primary partnerships and linkages will be with:

- Samoa Tourism Authority.
- All Government departments and agencies.

- Samoa industry suppliers and operators and other related industry participants.
- Village communities.
- Tourism Industry Associations.
- Local and international trade.
- The South Pacific Tourism Organisation.

- Pacific Asia Travel Association.
- The Tourism offices of other South Pacific destinations.
- Tourism training institutions and providers.
- All donor agencies.

Proposed operating framework is depicted in the following chart:



18.8.2 Goals and key areas of focus

18.8.2.1 Goals

- To ensure a strong and vibrant sector and in particular to ensure:
 - An all of Government approach to tourism development.
 - Effective industry leadership and coordination with meaningful and effective linkages and partnerships.
 - Strong collaborative culture and unity of purpose.
 - Effective input of tourism perspective into all Government policy determinations where there might be some implications for tourism through effective tourism industry contribution into tourism policy development.

- To maximise and ensure the continuing strength and effective influence of the tourism industry through strong industry member organisations.

18.8.2.2 Key areas of focus

- To establish an integrated structural framework which provides formal communication channels between and unites all stakeholders within the sector.
- To understand and interpret the views and perspective of all relevant stakeholders in Samoa tourism and to effectively and efficiently respond.
- To successfully access and effectively and efficiently utilise donor funds in order to assist in implementation of this development plan.

18.8.3 Strategies and plans

18.8.3.1 Lead Agency - Samoa Tourism Authority (STA)

- Continue STA as peak agency in delivery of this Tourism Development Plan with:
 - Clear, defined and well communicated operational role and Corporate Plan.
 - Clear and well communicated annual marketing plans.
 - A structured and dynamic Board of Directors comprising appropriate Government representatives and influential and credible industry people.
 - An effective Chief Executive Officer.
 - Effective sub-committees or Tourism Advisory Groups (TAG) e.g. Tourism Marketing Task Force (TMT), key market advisory groups and suchlike as may be required from time to time
 - Capacity to convene Special Tourism Task Forces comprised of relevant Government representatives and others in order to provide a truly all of Government response as might be required on a needs basis from time to time.

The role, functions, structure, and powers of STA, have recently been overhauled and restated in the proposed new legislation that will be the Samoa Tourism Development Act.

The Act specifies the core functions of STA to be:

- Administration, promotion and regulation of the tourism sector of Samoa.
- Hosting and participating in forums and meetings to promote engagement between stakeholders.
- Formulating proposals for incentive schemes for the development of the tourism sector.
- Formulating tourism related policies.
- Preparing a five year Tourism Development Plan.

- Advising the Minister and Government in relation to tourism.
- Ensuring that consultation takes place with other government agencies in relation to the enforcement of laws affecting the tourism sector and developing processes and procedures whereby such laws may be more effectively implemented through streamlined processes and other appropriate means.
- Participating in the administration of the licensing requirements applying to providers of tourism accommodation and other tourism businesses.
- Ensuring that appropriate standards and systems of ratings are formulated for the tourism sector and applied through the licensing regimes and by other appropriate means.
- Administering an inspectorate to monitor and report on any aspect of the tourism sector and tourism businesses and to conduct such inspections and investigations as necessary for the effective implementation of the Act.
- Maintaining records, statistics and accounts in relation to its functions.
- Implementing marketing strategies and promotional activities.
- Undertaking research into any matter concerning the tourism sector.
- Monitoring the effectiveness of the marketing and promotional activities, verifying the statistics, records and projections relating to the tourism sector and making recommendations to enhance the effectiveness of such programs and activities.
- Disseminating information relevant to the tourism sector in Samoa and
- Doing all other acts and things to effectively implement the Act.

The Act goes on to specify the Powers that are available to STA as follows:

- To establish committees, taskforces or entity for the purposes of implementing the provisions of the Act.

- To produce and to sell or distribute free of charge magazines, pamphlets and other publications and advertising material.
- To require the provision of information, records and statistics and to distribute or supply the results of and conclusions drawn from that information.
- To act as agent for any person or organisation, and to collect fees and commissions.
- To classify premises offering tourist accommodation according to the standards of facilities, amenities and services provided in such premises.
- To establish, maintain, provide and operate buildings, services, attractions, amenities and facilities for tourists and the public.
- To co-operate with any person or persons, (whether incorporated or not and whether in Samoa or elsewhere) or any Government Ministry or agency that may be engaged, concerned or interested in the promotion of

18.8.3.2 Linkages and partnerships

- Build linkages and maintain regular contact with key partners.

18.8.3.3 Services (benefits) to industry

- To assist industry members needs by provision of:
 - Collaborative destination marketing, industry representation and product and standards development opportunities.
 - Facilitation of education and training opportunities.
 - Networking opportunities.
 - Links to www.samoa.travel web-site.
 - Frequent and timely communication of news and opportunities via newsletter and other communications.
 - Provision of some guidance, referral, and research literature via subscription intranet and other websites.
 - Opportunities to participate in industry and promotional familiarisation programs.

- tourist traffic for Samoa and to contribute to the expenses involved in such co-operation.
- To otherwise undertake or assist in any product development within the tourism sector and any necessary capacity building program or activity and
- To do anything incidental to the exercise of the foregoing powers.

The appointment of directors to the Board is a matter for Cabinet. Nevertheless consideration will be given to a structure comprised along the following lines:

Board Composition	No.
Representatives of Government: <ul style="list-style-type: none"> • Minister of Tourism - Chairman • Associate Minister of Tourism – Deputy Chairman • CEO Samoa Tourism Authority • CEO Ministry of Finance • CEO Ministry of Natural Resources and Environment • CEO Ministry of Industry, Commerce and Labour 	6
Nominated Directors: (Selected from nominations called for and received from private sector industry organisations as recognised by STA from time to time).	5
Specialist Directors: (optional) (Selected at the option of the above 11 foundation members of the Board in the event that they believe that additional specialist skills might be necessary or desirable).	2
Total	13

- Opportunities to participate in advertising in destination brochure.
- Booking agency services.
- Representation of industry interests to Government.
- Information services to industry, investors, journalists and other relevant third parties.

18.8.3.4 Public relations

- Institute a community education and Public Relations campaign as to the benefits and economic flow through effects and the successes of tourism via various means including:
 - Press / media releases.
 - A monthly electronic “What’s Up?” newsletter to industry members.
 - Report to stakeholders by way of accountability against existing budget allocations. Report against Tourism Development Plan key performance indicators.

18.8.3.5 Donor Support

A range of donors and regional organisations have and are actively supportive of the broader tourism industry.

However, in December 2007, the NZAID Tourism Support Fund in particular, came to a close following over 15 years of support to the development of the sector. In 2008, the Private Sector Support Facility funding program was established to assist private small to medium businesses to promote sustainable livelihoods in both rural and urban areas. This scheme is jointly funded by NZAID and UNDP.

The fund comprises two categories. Category B (30 % of the total fund) is for immediate and emerging opportunities such as preliminary investigations with the object of establishing significant new initiatives such as:

- Development of new export initiatives especially in product exports and tourism
- Creation of products and in some instances services for import substitution
- For those at the first level of the private economy, improved participation in some form of productive and sustainable occupation.

Where part of an integrated program, PSSF will support market development initiatives in the form of exhibitions, trade shows, market exploratory visits

and missions, promotional materials and short term on the job training.

Category A (70 % of the total fund) is intended for multi participant beneficiary proposals including industry sector studies, group initiatives, market studies, and technical studies.

Applicants will need to demonstrate collaborative connections, group benefits and why the initiative is incapable of being funded by alternative means.

The PSSF is administered by the Ministry of Commerce, Industry and Labour.

Other funding currently available for the sector include the EU Micro-projects, GEF and others.

As Samoa moves toward greater economic self-sufficiency, the role of donors is expected to decline. However, over the course of this plan, donors are likely to continue to have an important role in infrastructural developments and in capacity-building. The Aid Coordination Committee will continue to be responsible for coordinating donor support in this area. STA and the industry should take a proactive role in seeking donor assistance from other potential development partners for further development of the sector.

19 Implementation

19.1 From planning to action

A requirement to the development of a vibrant and growing tourism sector is to have a clearly articulated government policy, which outlines the steps required and allocates responsibility and funding for implementation. Until in relatively recent years, tourism has been developed without necessarily full commitment of all sectors of Government, and within relatively constrained resources.

If tourism is to be developed successfully, government ministries and agencies will need to allocate resources to the priorities identified in this Plan. The process of compilation of the Tourism Development Plan is the first stage in supporting the development of the sector, but the key will be in the commitment to implementation and the creation of strong institutions to support investment by the private sector. The implementation of this Plan will require commitment and coordination from a wide range of stakeholders. Commitment is required to a *whole of government* approach and to the funding and implementation of this policy from the highest level of government. The Government has by virtue of its commitment in the Strategy for Economic Development for Samoa, placed a much higher emphasis on tourism development. That commitment must now be represented in all Government policies. The tourism portfolio should receive highest status and ministerial appointments should be made with correspondingly appropriate consideration. Implementation of the Tourism Development Plan will be vital and financial resources will be needed for this to happen. This funding should be structured in such a way that ensures continuity in the years to come.

If the tourism sector is to develop and the targets established within this Plan are to be achieved, all stakeholders will need to be committed and invest in the future of the industry. Funding will be required from government, through the recurrent and the development budget, the industry and Development

partners. A coordinated approach needs to be taken to sourcing funds and prioritisation of implementation.

A number of potential projects have been established as part of the development of this Plan and after extensive consultation with the private and public sectors. These projects provide basis for implementation of the Tourism Development Plan over the initial five-year implementation period and beyond. These projects also provide a coherent sector development program which meets the most urgent needs identified through this plan.

19.2 Development partner programs liaison

Effective and timely implementation of this Plan will be significantly enhanced by the potential to focus and coordinate the collective of all available and alternative funding sources. This will require drawing on the resources of government, the tourism industry, investors, and development partner programs.

The development of a sustainable tourism industry in Samoa offers both bilateral and multilateral donors a mechanism to achieve many of their articulated objectives. Therefore, there is a need for close liaison between government, the industry, communities, NGOs and Development Partners in Samoa. The scale of activity required to implement the recommendations of this Plan means that development partner assistance is essential if objectives are to be best achieved and if this Plan is to be most effective within desired timeframes. Assistance will be sought from Development Partner funds for projects targeted to achieve sustainable tourism sector outcomes where resources are not currently available from within government.

19.3 Co-ordination, monitoring and review

STA will be the lead agency to co-ordinate implementation, liaison within government, other key agencies and the private sector and monitoring of this Plan. Part of this role will be to work closely with all Government departments and to seek funding for the identified priority tourism

development activities and to work closely with the Ministry of Finance to secure government funding for key initiatives.

STA will prepare a 5 year Corporate Plan and annual operating plans that enable best effect to be given to achievement of the goals and effective implementation of the strategies of this Tourism Development Plan.

STA will establish a process for monitoring the implementation of the Plan and providing feedback to key stakeholders. STA will also undertake responsibility for an annual review of the Tourism Development Plan and further for a major review and revision in advance of the expiry of the 5 years target timeframe of the Plan.

19.4 Action Plans

This Tourism Development Plan has, where possible and practical, been structured to identify and link strategic responses to particular issues.

In so doing, extensive lists of response strategies and actions have been itemized within both the SWOT analysis and within the key thematic areas contained in this Tourism Development Plan. Key Item Action Plans have been incorporated within each of the key theme areas of the Plan. Collectively, these strategies, activities and actions form the foundation of the implementation program for the next five year period and beyond.

The Key Item Action Plans identify:

- The key initiative and follow up actions required.
- The stakeholders with responsibility for implementation.
- The priority for implementation as follows:
 - Ongoing – Continue as present, or as soon as practical and then perpetual
 - Priority 1 (Immediate Term) – within the next financial year (2009)
 - Priority 2 (Medium Term) – within the 2010 and 2011 financial years)

- Priority 3 (Long Term) – within 2012 and 2013 financial years.

There will be a need to revise these plans annually to reflect progress in implementation as well as new priorities which have arisen. STA will regularly review progress on implementation of the Action Plans and initiate amendments as necessary or desirable.

19.5 Occasional special tourism task forces

The implementation of this Plan needs to be a collaborative effort between government agencies, the private sector and other key stakeholders. The Government needs to coordinate the implementation of the Tourism Development Plan at the highest level. From time to time, issues will arise that require urgent and coordinated response.

In these circumstances STA is, by virtue of the Tourism Development Act, empowered to, and will convene, Occasional Special Tourism Task Forces comprised of such representation as STA believes to be necessary or appropriate for the particular matter in issue. STA will act as the Convener and Secretariat for occasional special Tourism Task forces that are from time to time established on an issues basis.

20. Managing Risk

20.1 Introduction

The dramatic impact that severe climate conditions, political upheavals, SARS and various terrorism attacks for instance have had on a number of destinations has clearly demonstrated the need for critical tourism risk assessment and management. Tourism destinations and organisations need to be involved in disaster management committees at both national and international level. Such participation enables the importance of tourism to be reinforced to disaster management agencies and promotes the need for appropriate measures to protect visitors to be considered and developed.

By virtue of its sheer diversity of aspects of both demand and supply, tourism is exposed to a multitude of potential risks from a number of potential sources. Thorough tourism risk management is imperative to ensure best protection of the well being, health and safety of visitors, tourism businesses, workers and host communities. In so doing to best protect and preserve Samoa's reputation as an appealing tourism destination.

Managing risk and protecting tourism is an ongoing process and requires effective partnerships between and within nations, governments, communities, businesses and organisations.

20.2 Process

The United Nations World Tourism Organisation (UNWTO) takes the view that risks to the health, safety and security of tourists, host communities and tourism employees can originate from four source areas:

- Physical or environmental risks (natural, climatic, epidemic)
- The human and institutional environment outside the tourism sector
- The tourism sector and related commercial sectors
- The individual traveller (personal risks)

Risks have been identified and evaluated against two key criteria of consequences and likelihood.

The consequences of risks have been assessed in accordance with the *Generic Qualitative Measures of Consequence for Tourism* as specified in the *APEC International Centre for Sustainable Tourism* guide to risk management which are:

Descriptor	Description
Insignificant	<ul style="list-style-type: none">• No disruption to normal business• No disturbance of visitors• No financial loss• No media or public interest.
Minor	<ul style="list-style-type: none">• Minimal disruption to normal business• Limited or no financial loss• No media coverage or public interest.
Moderate	<ul style="list-style-type: none">• Short-term disruption to normal business and services to visitors• Some financial loss• Limited media reporting.
Major	<ul style="list-style-type: none">• Disruption to normal business for more than 24 hours financial losses• Anger and frustration on the part of visitors• Critical media reports and public criticism of tourism• Damaged reputation as a destination.
Catastrophic	<ul style="list-style-type: none">• Unable to meet visitors' requirements and provide• Normal service type and level• Severe financial losses;• Widespread criticism of tourism;• Critical international media reports• Mass cancellation of bookings;• Damaged reputation as a destination.

The likelihood of risks have been categorised as:

Category	Description
Almost certain	Is expected to occur in most circumstances
Likely	Will probably occur
Moderate	Might occur at some time in the future
Unlikely	Could occur but doubtful
Rare	May occur but only in exceptional circumstances

Consequences		Insignificant	Minor	Moderate	Major	Catastrophic
Likelihood	Ranking	1	2	3	4	5
Almost certain	5	6	7	8	9	10
Likely	4	5	6	7	8	9
Moderate	3	4	5	6	7	8
Unlikely	2	3	4	5	6	7
Rare	1	2	3	4	5	6

Risks have then been classified as follows:

Extreme Risk (E)	>7	Immediate reaction required
High Risk (H)	6, 7	Senior risk management attendance needed
Medium Risk (M)	5	Risk management responsibility to be specified
Low Risk (L)	< 5	Manage by routine procedures

20.3 Risk Management Matrix

Key risks identified together with summary evaluation and proposed strategic responses are tabulated in the following. Where appropriate or desirable, responses will be coordinated with relevant agencies. Only tourism specific responses have been incorporated in the follow tables.

Risks from the physical environmental (natural, climatic, epidemic)

The Risk What can happen?	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Natural disaster such as severe cyclone, tsunami, floods, earthquake, volcanic eruption.	Extreme	5	5	10	<ul style="list-style-type: none"> • Ensure accurate information is disclosed in all visitor information sources. • Develop disaster recovery action plan which ensures formal channels of communication are established between all relevant disaster management agencies. This must also ensure that correct and accurate information is being quickly communicated to visitors, trade and potential visitors.
Potential physical implications of climate change.	Extreme	4	4	8	<ul style="list-style-type: none"> • Ensure accurate identification of potential changes in physical environment and factor into planning and development decisions.
Potential market implications of climate change, particularly from growing concerns regarding long haul aviation emissions.	Extreme	4	4	8	<ul style="list-style-type: none"> • Ensure Samoa is positioned as having adopted principles of sustainability and as an eco efficient destination.
Severe disease epidemic e.g. SARS, Avian bird flu.	High	3	4	7	<ul style="list-style-type: none"> • Ensure accurate identification of potential changes in physical environment and factor into planning and development decisions.
Moderate disease epidemic e.g. dengue fever, typhoid, malaria	High	5	2	6	<ul style="list-style-type: none"> • Ensure accurate identification of potential changes in physical environment and factor into planning and development decisions.
Damage to natural environment through insensitive development and uncontrolled or excessive loadings of visitors.	High	3	3	6	<ul style="list-style-type: none"> • Identify and ensure appropriate regulation and management of protected areas. • Adopt and apply principles of sustainability throughout the tourism sector.

The Risk What can happen?	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Adverse news items and publicity conveying negative imagery e.g. Problems with stray dogs, tropical diseases, urban violence, and suchlike.	Extreme	5	3	8	<ul style="list-style-type: none"> Act to remedy difficulties where possible. Ensure accurate tourist information. Emphasise positives.

Risks from the human and institutional environment outside the tourism sector

The Risk What can happen?	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Act of terrorism.	High	2	4	6	<ul style="list-style-type: none"> Media management to ensure that correct and accurate information is quickly communicated to visitors, trade and potential visitors.
Political instability.	High	2	4	6	<ul style="list-style-type: none"> As above.
Financial recession in or significant shift in exchange rate with key source markets.	Extreme	5	4	9	<ul style="list-style-type: none"> Ensure diversity of markets and market segments without excessive dependencies. Accelerate development of emerging and new markets and segments.
Higher fuel costs contributing to decreased competitiveness.	High	3	3	6	<ul style="list-style-type: none"> Monitor and collaboratively build response with air carriers and other stakeholders.
".WS" pornography website	High	5	2	7	<ul style="list-style-type: none"> Dissociate

Risks from the tourism sector and related commercial sectors

The Risk What can happen?	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Reduction in aviation services, frequencies, capacities or connectivity and or cruise ship arrivals.	High	3	4	7	<ul style="list-style-type: none"> • Ensure strong partnership with all carriers and shipping companies. • Collaborate with other South Pacific destinations to build route viability through growth in visitation to and within the region. • Ensure relevant government taxes, charges and imposts are reasonable in the context of the competitive environment. • Consider route subsidisation strategies.
Increased aggressiveness in competitiveness from directly competing destinations.	Extreme	5	4	9	<ul style="list-style-type: none"> • Constantly monitor and consider responses to all competitive initiatives. Establish and maintain consumer travel patterns and behaviours research and reporting capabilities and systems. • Ensure Samoa is continually positioned in target markets being a premium and unique destination offering a Samoan Experience that is unavailable elsewhere.
Delivery of less than optimal visitor experiences.	Extreme	5	3	8	<ul style="list-style-type: none"> • Ensure uplift in standards through training and accreditation systems. • Ensure continuing operator education and up-skilling. • Ensure attraction of investment in building greater diversity of products and activities.
Unavailability of sufficient appropriately skilled workforce.	Extreme	5	3	8	<ul style="list-style-type: none"> • Ensure ongoing appropriate vocational and industry training. • Link provision of investment incentives to investor investment in training and workforce skills enhancement.
Inability to attract investment.	Extreme	5	3	8	<ul style="list-style-type: none"> • Ensure effective investment attraction environment and program inclusive of opportunities, incentives and facilitation.
Accidental death, disability, or injury of tourism worker.	Extreme	5	3	8	<ul style="list-style-type: none"> • Continually identify all risks to safety and ensure appropriate training, supervision, preparation and publication of safety information and warnings signage. • Ensure tourism operator adoption and compliance with international standards of workplace health and safety. Incorporate as part of accreditation criteria. • Legislate for minimum standards where appropriate.

The Risk What can happen?	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Demise of tourism industry associations.	Low	2	2	4	<ul style="list-style-type: none"> Officially recognise, build strong partnership and communication channels and support.
Drawing the wrong conclusions and setting less than efficient strategies.	Low	2	2	4	<ul style="list-style-type: none"> Ensure continual research, data collection and analysis. Plan monitoring, review and amendment as appropriate. Encourage operators to contribute data that is accurate and complete.

Risks from the individual traveler (personal risks)

The Risk What can happen	Overall Risk Classification	Likelihood Rating (a)	Consequence Rating (b)	Overall Risk Level (a+b)	Tourism Strategies
Accidental death, disability, or injury of visitor.	High	2	4	6	<ul style="list-style-type: none"> Identify all physical risks to safety and ensure appropriate preparation and publication of safety information, and warnings signage (multi lingual in languages of all major markets). Ensure tourism operator adoption and compliance with international standards of operation; incorporate as part of accreditation criteria. Legislate for minimum standards. Establish life guard facilities as appropriate.
Visitor becomes victim of crime.	High	4	2	6	<ul style="list-style-type: none"> Ensure appropriate visitor information. Provide efficient and supportive response to incidents. Establish police tourism liaison officer to enable better understanding and response to particular tourist needs.
Visitor commits crime intentionally.	Medium	3	2	5	<ul style="list-style-type: none"> Ensure appropriate communication channels and protocols with all foreign delegations to address issues.
Visitor commits crime or social indiscretion unintentionally.	Medium	3	2	5	<ul style="list-style-type: none"> Ensure appropriate visitor information and signage in relation to cultural customs and sensitivities and expected protocols of behaviour.
Undesirable social behaviour (prostitution, drugs, drunkenness).	High	4	2	6	<ul style="list-style-type: none"> Ensure appropriate visitor information and signage in relation to cultural customs and sensitivities and expected protocols of behaviour.

APPENDIX I

KEY ACTIONS AND PRIORITIES

Key actions and priorities – Destination promotion and marketing

	Key Action Items	Key Responsible Agencies	Priority
(i)	Build and market the 'Samoan Experience' as a unique, exotic nature based, aspirational must do experience complete with bragging rights	Lead agency – STA Others involved – industry stakeholders.	P2 & Ongoing
(ii)	Continue build of comprehensive web and online "e" presence promotional and marketing capabilities; interactivity and on line booking capacities, and develop and implement web optimisation strategy.	Lead agency – STA Others involved – web developers.	P1 & Ongoing
(iii)	Examine how existing and new products can better be utilised and repositioned to cater for new geographical or psychographic segments, or new services.	Lead agency – STA Others involved – industry stakeholders (especially niche operators and those targeting special interest groups).	P2
(iv)	Undertake consumer research at all levels, both domestically post arrival and in market, to better understand demographics of existing and potential markets, travel patterns and preferences, trigger points, and psycho graphics.	Lead agency – STA	P1
(v)	Undertake increasingly detailed study into target market segmentation and supply capacities and potential.	Lead agency – STA and Market Research Specialist. Others involved – industry stakeholders.	P2

	Key Action Items	Key Responsible Agencies	Priority
(vi)	Undertake branding study (with benefit of prior market research); prepare support collateral information materials for distribution to trade, visiting journalists and others on each aspect of the underpinning imagery. Ensure adoption and conformity by all of industry.	Lead agency – STA and Brand Specialist. Others involved – industry stakeholders.	P3
(vii)	Prepare annual destination promotional and marketing plan, and undertake all marketing activities; prepare destination brochure, undertake promotional campaigns, prepare media kits, publicity, advertising and editorial coverage, visiting journalist programs, collaborative and individual trade visits, sales missions, in all core and secondary markets.	Lead agency – STA/Market Representatives.	P1 & Ongoing
(viii)	Develop and produce promotional collateral support materials including niche product / niche market brochures, interpretative materials, DVD, etc.	Lead agency – STA. Others involved – niche operators.	P1 & Ongoing
(ix)	Maintain a targeted familiarisation management program.	Lead agency – STA/Market Representatives and Tour Wholesalers. Others involved – airlines, industry stakeholders.	P1 & Ongoing
(x)	Continue in-market representation in Australia and New Zealand. Seek contractual representative arrangements in secondary markets particularly North America.	Lead agency – STA. Others involved – contracted representatives or representation companies.	P1 & Ongoing

	Key Action Items	Key Responsible Agencies	Priority
(xi)	Proactively manage a visiting journalist program (target and respond to visiting journalists) and produce a media kit for distribution to visiting journalists.	Lead agency – STA/Market Representatives Others involved – airlines, industry stakeholders, experience/activity providers.	P1 & Ongoing
(xii)	Develop strategy to promote Samoa as a great movie film location.	Lead agency – STA. Others involved – industry stakeholders, MOF, MOR, MWTI, MNRE, MOH/NHS, OAG, MAF/Quarantine, Police,	P3
(xiii)	Develop natural disaster tourism communications and media recovery plan and ensure formal channels of communication are established between all relevant disaster management agencies which ensure that correct and accurate information is being quickly communicated to visitors and potential visitors.	Lead agency – STA and communications specialist. Others involved – industry stakeholders, MNRE/DMO, MAF/Meteorology, MOH/NHS, Police, MCIT, SamoaTel/Go Mobile, Digicel, ISPs	P1
(xiv)	Develop and implement detailed targeted sports tourism strategy and promotional campaign.	Lead agency – STA. Others involved – Samoa Sports Facilities Authority and Sporting Bodies/Associations.	P1 & Ongoing
(xv)	Develop and implement detailed targeted education tourism strategy and promotional campaign.	Lead agency – STA. Others involved – MESC, NUS, industry stakeholders	P3 & Ongoing

	Key Action Items	Key Responsible Agencies	Priority
(xvi)	Build VFR specific strategies e.g. "2012 – Samoa Homecoming Year" themed campaign with an appropriate calendar of supporting events.	Lead agency – STA. Others involved – event organisers	P3 & Ongoing
(xvii)	Develop and implement other niche market segment (e.g. surfing, special interest) marketing and promotion strategies and campaigns.	Lead agency – STA. Others involved – niche operators.	P1 & Ongoing
(xviii)	Establish internal protocols between agencies enabling communication to STA of all Samoan foreign delegations. Identify Samoan and other celebrities, negotiate engagement. utilise all as tourism ambassadors where possible and appropriate.	Lead agencies – celebrity agents/managers, PR agents and STA.	P3 & Ongoing
(xix)	Investigate potential to establish "iconic" experiences such as "edge of the world" events, great surf, great walks, great bike rides and others.	Lead agency – STA and experience/activity developers.	P2

Key actions and priorities – Product, service and infrastructure development

	Key Action Items	Key Responsible Agencies	Priority
(i)	Finalise and implement the standards and rating system which STA has developed.	Lead Agency – STA Inspection Committee All accommodation properties	Priority 1 & Ongoing
(ii)	Implement and promote standards and rating scheme. Implement aspirational accreditation scheme.	Lead Agency – STA SHA & All accommodation providers	Priority 1 & Ongoing
(iii)	Gear product development and marketing towards selective higher end of markets. Distinguish Samoa as a “special” destination, not a “me too” destination.	Lead Agency – STA SBEC SHA MCIL	Priority 1 & Ongoing
(iv)	Actively seek out and support reputable developers of larger style properties. Support and widely advertise existing incentives, laws and regulations, include all legislation in the STA website.	Lead Agency – STA MCIL Investment Committee	Priority 1 & Ongoing
(v)	Develop policies and initiatives which support the development of tourism in communities and ensure that the benefits of tourism are equitably spread.	Lead Agency – STA Community Leaders MWCSD	Priority 2
(vi)	Undertake investigation of feasibility of developing a Cultural Centre attraction as a showcase and cultural keeping Place of Samoan culture and heritage.	Lead Agency – MESC MWTI STA- Facilitation Role	Priority 3

	Key Action Items	Key Responsible Agencies	Priority
(vii)	Encourage development by town planners of design covenants in keeping with themes and flavours of a nature based and eco sensitive and sustainable destination presentation and management for incorporation into building approval processes.	Lead Agency – MWTI MNRE STA – Facilitation Role	Priority 2
(viii)	Regulate, publish, advertise and display attraction entrance charges. Work with community leaders to enhance understanding of importance of consistency and compliance.	Lead Agency – STA MWCSD MNRE Attraction Site Operators	Priority 1
(ix)	Encourage golf courses to collaborate and package between themselves and with accommodation suppliers and rental car companies to deliver a 3 – 7 day golf package product targeted at Australian and New Zealand business men groups of usually between 4 and 16.	Lead Agency – Golf course Operators Airlines Accommodation Sector Car Rental Association STA – Facilitation Role	Priority 1
(x)	Implement tourism development area strategies and updated development checklists.	Lead Agency – STA Utilities Providers – MWTI, EPC, SamoaTel, Digicel, SWA	Priority 1 & Ongoing
(xi)	Identify possible sites, for boutique 'wilderness retreat' style resort accommodation and prepare promotional concept profile.	Lead Agency -STA SLC MNRE MCIL Potential Operators	Priority 2
(xii)	Facilitate training of guides and interpreters and the development of commercial guiding services.	Lead Agency – Training Providers (APTC, NUS, Industry Trainer) Inbound Tour Operators Attraction Site Operators STA – Facilitation Role	Priority 1

	Key Action Items	Key Responsible Agencies	Priority
(xiii)	Investigate opportunities for nature based events (e.g. Eco Challenge, Triathlon, reality television nature based contests or similar) which both highlight the natural positioning of the country and generate wide publicity of it. Consider also opportunities for Samoa to become a film site location for feature films.	Lead Agency – STA MNRE SPREP	Priority 2
(xiv)	Investigate opportunities for land based activities and develop as products available for visitors.	Lead Agency – STA Potential Activity Providers MNRE SLC LTA	Priority 2
(xv)	Investigate opportunities for National Park Development and world heritage listing where appropriate.	Lead Agency – MNRE UNDP SPREP STA – Facilitation Role	Priority 1 & Ongoing
(xvi)	Investigate means by which to develop the arts and crafts capacities, particularly in joint marketing and assisting with technical, business management training and accessing and understanding of market needs through focused research.	Lead Agency – MESC SBEC Art & Crafts Operators STA – Facilitation Role	Priority 3
(xvii)	Examine opportunities in consequence of the planned convention centre.	Lead Agency – Agency responsible for marketing the Convention Centre STA – Facilitation Role	Priority 1
(xviii)	Actively participate in combating wild dog problem through the NBC and other forums.	Lead Agency – MNRE NBC MPP STA – Facilitation Role	Priority 1 & Ongoing

	Key Action Items	Key Responsible Agencies	Priority
(xix)	Develop “tastes of Samoa” cuisine and educate business owners as to the significance of food as part of the visitors overall “Samoa” experience	Lead Agency – Restaurant Operators APTC & NUS IOT MOH STA	Priority 3
(xx)	Install good general and tourism specific directional road signage throughout Samoa.	Lead Agency – STA MNRE MWTI or LTA	Priority 1
(xxi)	Regulate taxi industry to ensure fair charges and to facilitate continuing upgrade of services to international visitor requirements and expectations.	Lead Agency – LTA Training Providers Taxi Drivers Association STA – Facilitation Role	Priority 2
(xxii)	Develop walking, biking, horse-riding tracks, resting points, interpretative signage and viewing platforms etc in National Parks. Investigate user- pays systems of entry fees, levies and suchlike.	Lead Agency – MNRE Potential Donor agency STA – Facilitation Role	Priority 2
(xxiii)	Install warning signage in relation to potentially dangerous currents and other hazards at beaches and other land attractions where appropriate.	Lead Agency – Attraction Site Operators & MNRE Red Cross STA – Facilitation Role	Priority 1
(xxiv)	Continue with “meet and greet” program and stalls for cruise ships	Lead Agency – Shipping Agencies SPA STA – Facilitation Role	Priority 1 & Ongoing
(xxv)	Develop tourism retail strategy for all tourism but specifically including cruise shipping visitors. Particularly consider arts and crafts markets, fine arts, visitor services etc	Lead Agency – STA SPA MFAT MNRE (PUMA)	Priority 3

	Key Action Items	Key Responsible Agencies	Priority
(xxvi)	Develop options for cruise ship passengers to access southern coast direct from cruise ship.	Lead Agency - SPA STA	Priority 2
(xxvii)	Improve capacities for managing people with special needs on the public transport vessels and across the full spectrum of Samoan public areas.	Lead Agency – SSC, LTA, SPA, MNRE, MWTI STA- Facilitation Role	Priority 3

Key actions and priorities – Resource Management

	Key Action Items	Key Responsibilities	Priority
(i)	Adopt, implement, establish monitoring systems and processes and report against Samoa's sustainable tourism indicators. Interpret results and determine appropriate strategic responses.	Lead Agency - STA MNRE SPREP	Priority 1 & Ongoing
(ii)	Environmental impact assessment to be considered in relation to all developments for any purpose.	Lead Agency – MNRE (PUMA) STA – Facilitation Role	Priority 1 & Ongoing
(iii)	Greater public awareness of planning needs to be combined with tighter development controls through the business licensing regimes to help owners and operators ensure their proposals for extensions or new developments are environmentally and socially sound.	Lead Agency - STA MNRE (PUMA) MOR	Priority 1 & Ongoing
(iv)	Identify key sites and catalogue the historic, cultural or environmental significance and protection of the areas from investigation of communities, owners and custodians. Implement protection systems.	Lead Agency - STA MNRE Attraction Site Operators MWCSD	Priority 1
(v)	Tourism opportunities in MPAs need to be assessed and further developed and mitigation strategies for particular tourism pressure points on coral reefs and the marine environment need to be undertaken so that the economic potential for the sustainable use of these areas can be expanded and fully realised.	Lead Agency - MAF MNRE Villages with MPAs MWCSD STA – Facilitation Role	Priority 3
(vi)	Continue clean up campaigns and maintain the National Beautification program. Constantly reinforce 'Keep Samoa Clean' themes.	Lead Agency – NBC	Priority 1 & Ongoing
(vii)	Work with Village Councils to establish appropriate 'behavioural protocols' and supporting signage and strengthen awareness programs for visitors.	Lead Agency – Villages with Tourism developments MWCSD STA – Facilitation Role	Priority 2

	Key Action Items	Key Responsibilities	Priority
(viii)	Review adequacy and opportunities for improved performance of policing resources and response systems. Set up within STA and the industry liaisons with the Police, so STA can actively play a role to ensure better responses to complaints.	Lead Agency - MPP STA	Priority 1
(ix)	Samoa Police to establish Tourism Liaison Unit / Officers to enable better understanding of and response to tourism issues.	Lead Agency - MPP STA – Facilitation Role	Priority 1
(x)	Encourage all existing and new hotel developments to integrate water-saving technologies and encourage the use of rainwater tanks where possible. This can be addressed by development planning approval requirements and processes.	Lead Agency – SWA MNRE MWTI STA – Facilitation Role	Priority 1

Key actions and priorities - Access

	Key Action Items	Key Responsible Agencies	Priority
(i)	Establish partnership task force between STA and SAA to identify and investigate possible new airline access to Samoa. Build business case and promote to target carriers.	Lead Agency – Task Force SAA STA – Facilitation Role	Priority 2
(ii)	Work in partnership with Air New Zealand and other reliant South Pacific destinations (Tonga), to initially build sustainability and route viability into the Los Angeles - Apia service.	Lead Agency – STA Air New Zealand Tonga Government	Priority 1
(iii)	Identify outbound charter operators and explore and target opportunities for Charter series, to assist in servicing possible emerging new markets e.g. China (Chinese New Year), Japan (Golden Week).	Lead Agency – Special Task Force SAA STA – Facilitation Role	Priority 3
(iv)	Encourage tourism operators to package air/land deals.	Lead Agency – SHA, Airlines, Other Accommodation Providers Inbound Tour Operators STA – Facilitation Role	Priority 1
(v)	Continue Cruise ship working group.	Lead Agency – SPA STA – Facilitation Role	Priority 1 & Ongoing
(vi)	Undertake review of competitiveness of all Government charges, taxes and other imposts e.g. landing charges etc.	Lead Agency – SAA STA – Facilitation Role	Priority 2
(vii)	Identify and establish eco-efficiencies and environmental sustainability of Samoa which can be promoted effectively as "off sets" or "carbon credit" to relieve concerns of long haul travellers.	Lead Agency – STA TMT MNRE SPREP	Priority 2

	Key Action Items	Key Responsible Agencies	Priority
(viii)	Proactively investigate opportunities for new airline route development proposals for consideration by airlines and if appropriate, implement an Aviation Route Development Assistance Plan to provide incentives for attracting new airline services.	Lead Agency – SAA TMT Airlines STA – Facilitation Role	Priority 3
(ix)	To investigate potential for driving increased demand and loadings by creatively utilising code share, international alliance and frequent flyer reward programs and so on.	Lead Agency – Airlines Tourism Marketing Task Force (TMT) SHA & other accommodation providers Inbound Tour Operators Travel Agents STA – Facilitation Role	Priority 2
(x)	Re-open Fagali'i airport to be operated by Polynesian Airlines in better serving the American Samoa route.	Lead Agency – Polynesian Airlines STA – Facilitation Role	Priority 1

Key actions and priorities – Tourism capacity building and workforce development

	Key Action Items	Key Responsible Agencies	Priority
(i)	Engage the existing educational institutions to launch, reinforce and continue tourism related courses including 'Train the trainer' programs.	Lead Agency – Training Providers (APTC, NUS & others) SQA STA – Facilitation Role	Priority 1 & Ongoing
(ii)	Support existing training programs and initiatives to introduce 'gap filling' courses and on the job courses tailored to the needs of specific properties.	Lead Agency – Training Providers (APTC, NUS & others) SQA STA – Facilitation Role	Priority 2
(iii)	Examine and implement mechanisms for incentives to employers that enable their staff to participate in training programs.	Lead Agency – SBEC & other training providers STA – Facilitation Role	Priority 2
(iv)	Educate operators on the benefits of packaging e.g. Air, air/land, accommodation, activities, Upolu with Savai'i extensions and vice versa.	Lead Agency – Training Providers Industry Members STA – Facilitation Role	Priority 1
(v)	Develop "How To" guides and support tools and materials.	Lead Agency – APTC, NUS STA – Facilitation Role	Priority 1
(vi)	Establish higher level tour guide training capacities, tour guiding interpretative materials and tour guiding accreditation structures.	Lead Agency – Training Provider Inbound Tour Operators STA – Facilitation Role	Priority 1
(vii)	Prepare case studies (both local and international) with success in village or community tourism developments for use in better awareness programs with village leaders.	Lead Agency – STA Village Communities involved in tourism developments MWCSD	Priority 3

	Key Action Items	Key Responsible Agencies	Priority
(viii)	Develop “taster” or “toe dipping” opportunities that enable the people in the villages to test the waters and experience the implications of tourism in a staged and low impact manner. By way of example, encourage community involvement through cultural villages within resorts and hotels or tour programs that take tourists into the village.	Lead Agency – Resorts/Hotels within villages Village communities involved in tourism development STA – Facilitation Role	Priority 3
(ix)	Establish “train-the-trainer” programs with focus on training supervisors and managers to transfer skills to their staff, enhance motivation and build team spirit. This program should be supported by the development of appropriate training materials.	Lead Agency – Training Providers STA – Facilitation Role	Priority 2
(xi)	Provide business advice for tourism businesses including accounting and book-keeping, marketing, assistance in writing business plans and undertaking feasibility studies.	Lead Agency - SBEC STA – Facilitation Role	Priority 1 & Ongoing
(xii)	Develop an ongoing business mentoring scheme which will not only assist business operators in building and sustaining their businesses, but will also be of assistance to them in handling individual issues as and when they arise.	Lead Agency - STA	Priority 1 & Ongoing
(xiii)	Facilitate training providers to provide short workshop-based training and manuals.	Lead Agency – Training Providers STA – Facilitation Role	Priority 2
(xiv)	Continue tourism awareness programs.	Lead Agency - STA	Priority 1 & Ongoing
(xv)	Examine opportunities and mechanisms for better and more use of overseas study tours, scholarships and internships.	Lead Agency - STA SHA and other industry members	Priority 2

Key actions and priorities – Land, business and investment

	Key Action Items	Key Responsible Agencies	Priority
(i)	Prepare and require compliance with minimum standards as a requirement for business licensing of tourism businesses.	Lead Agency – STA (Accommodation Standards Committee) SHA MOR	Priority 1 & Ongoing
(ii)	In accordance with legislation, establish an aspirational accreditation program that confers “preferred” “Accredited Tourism Operator” status to operators achieving accredited standards.	Lead Agency – STA Consultant Industry Operators	Priority 2
(iii)	Link investment incentives to requirement of Investor human resource and skills development plans.	Lead Agency – MCIL Investment Committee STA	Priority 1
(iv)	Establish a central point of reference and coordination capacity to assist tourism (and other) developers better understand and resolve development and land issues particularly providing for, security of tenure, certainty of title, definition, clarity and certainty of investment incentives, equity of incentives to all investors and sectors, community engagement and acceptance, benefits to community and dispute resolution.	Lead Agency – MCIL & MOF MNRE MWCSD STA	Priority 1 & Ongoing
(v)	Review Government development investment incentives in the context of the competitive environment particularly throughout the South Pacific region. Formulate alternative models as might be appropriate.	Lead Agency – MCIL Investment Committee STA – Facilitation Role	Priority 2
(vi)	Identify possible tourism development sites from land held by Samoa Land Corporation. Consolidate with investor management processes.	Lead Agency – SLC MCIL Investment Committee STA – Facilitation Role	Priority 2

	Key Action Items	Key Responsible Agencies	Priority
(vii)	<p>Establish an integrated investment attraction program (either generically, or for tourism projects exclusively). Program to encompass:</p> <ul style="list-style-type: none"> • Identified investment opportunity • Pre feasibility assessment • Potential for Public / Private partnerships • Promotional strategy for seeking investment. 	Lead Agency - STA MCIL MOF	Priority 1
(viii)	Develop 'pre-packaged' template business structures and models which have pre considered and developed mechanisms that appropriately manage the issues and concerns.	Lead Agency – Consultant STA – Facilitation Role	Priority 3
(ix)	Develop Average length of stay ("ALOS") yield specific strategies and educate and encourage industry operators as appropriate.	Lead Agency – STA Activities Providers	Priority 1 & Ongoing

Key actions and priorities – Research, planning and impact management

	Key Action Items	Key Responsible Agencies	Priority
(i)	Continue the development and refinement of the recently re-established STA tourism research division. Constantly monitor, report and publish tourism results, issues and impacts. Ensure communication of research results to industry operators.	Lead Agency: STA	Priority 1 & Ongoing
(ii)	Build compliance requirements and operational protocols across all areas of Government to ensure data capture and appropriate transmission and communication to the STA research division.	Lead Agency: STA Samoa Bureau of Statistics Immigration Division	Priority 1 & Ongoing
(iii)	Build research data capture and monthly (or quarterly) reporting systems, utilising industry contributed activity levels. Ensure accuracy, integrity and confidentiality of industry contributed intelligence.	Lead Agency: STA SHA	Priority 1 & Ongoing
(iv)	Undertake visitor survey during July 2009 to June 2010 and thereafter every alternative year. Review and redesign questionnaire to encompass all required intelligence.	Lead Agency: Statistics (yet to be finalised, might require technical assistance) STA: facilitator	Priority 2
(v)	Draw upon in market consumer research undertaken by organisations like PATA and SPTO, and others.	Lead Agency: STA PATA SPTO	Priority 2 Ongoing
(vi)	Analyse results, and develop strategies from, the Samoa Ports Authority questionnaire that was circulated to all cruise ship principals in late 2008.	Lead Agency: SPA STA, Tour Operators, Shipping agents, i.e. BBE, PFL : facilitator	Priority 2
(vii)	To monitor, and report against, Samoa's sustainable tourism indicators	Lead Agency: MNRE STA	Priority 2 & 3 & Ongoing

(viii)	Identify tourism assets and natural heritage attractions, and assess feasibility of bringing these assets to economically viable and marketable form.	Lead Agency: MNRE STA	Priority 2 & 3 Ongoing
(ix)	Ongoing monitoring of national and international industry trends and market performance	Lead Agency: STA	Priority 2 Ongoing
(x)	Design and implementation of a tourism forecasting models with specific focus directed towards forecast regional accommodation and infrastructural needs	Lead Agency: STA (Training area where assistance will be required)	Priority 2
(xii)	Assessment of economic, social and environmental impacts of tourism.	Lead Agency: KVA or an individual consultancy Facilitators: STA CBS, MNRE, MOF	Priority 2
(xiii)	Establishment of a research library, and dissemination of information	Lead Agency: STA	Priority 3
(xiv)	Investigate the possibility of setting up a tourism satellite accounting system for Samoa.	Lead Agency: STA (Training area and a need for technical assistance)	Priority 3

Key actions and priorities – Institutions and industry framework

	Key Action Items	Key Responsible Agencies	Priority
(i)	Enact and implement proposed Tourism legislation prepared in accordance with the Legislative review.	Lead Agency - STA	P1
(ii)	Develop communication policies, protocols and structures that enable the interests of tourism development to be better understood and factored in to operations and policies of all relevant Government departments and agencies.	Lead Agency - STA	P1
(iii)	Examine mechanisms for an improved and more formal structural framework which will allow for greater communication, cohesion and collaboration within all sectors of the tourism industry and with Government. Facilitate "an all of industry" representational body or alliance of existing representational bodies, in the form of Samoa Tourism Industry Association, Council or similar.	Lead Agency – All industry members STA – Facilitation Role	P2
(iv)	Continually maintain contact with and monitor development partner programs.	Lead Agency – STA Development Partners	P1 & Ongoing
(v)	Instigate a monthly electronic newsletter to industry members.	Lead Agency- STA	Ongoing

APPENDIX II

SWOT ANALYSIS

The process of preparation of this Plan has enabled identification of a considerable number of individual strengths, weaknesses, opportunities and threats relevant to the continuing growth and development of tourism for Samoa.

The following SWOT Analysis is separated into supply and demand side in an attempt to frame the relevant responses with a similar focus.

Supply Side: SWOT Analysis, Strategies and Actions

SWOT	Strategic Implication	Response Required
Social environment		
Strengths		
<ul style="list-style-type: none"> • Genuinely friendly and welcoming people, and world renown hospitality. • Educated and engaging labour force. • Appealing exotic Polynesian culture and heritage. • A genuinely safe destination. • A good "value for money" destination • Strong Christian values and lifestyle. 	<ul style="list-style-type: none"> • Sound foundations for market appeal. • Points for consideration when considering "unique competitive advantages." 	<ul style="list-style-type: none"> • Emphasise "Our People, Our Culture and Our Environment" in branding and packaging Samoa.
Weaknesses		
<ul style="list-style-type: none"> • Sundays are reasonably sacred and very little in the way of structured activities for visitors. • Some history of villager aggression towards visitors whose sightseeing unintentionally becomes an invasion of privacy e.g. snorkelers approaching clam farm areas. • Litter and rubbish prevalent • Anecdotal reports from visitors express dissatisfaction with police response to complaints. Response time is slow and service less than expected. This apparently resulting from limited resource availability. 	<ul style="list-style-type: none"> • Potential for less than optimal visitor experience. • Potential for less than optimal visitor experience and adverse word of mouth referral. • Detracts from the visual amenity of the destination • Potential for less than optimal visitor experience and adverse word of mouth referral. 	<ul style="list-style-type: none"> • Emphasise activities and facilities that are available on Sundays such as restaurants, beaches and other activities within tourist facilities. • Ensure visitors are informed of Sunday protocols. Emphasise strong Christian and family values as positives. • Emphasise the great hospitality and genuine generosity built into the Samoan psyche. • Continue clean up campaigns and maintain "Keep Samoa Clean" themes. • Review adequacy and opportunities for improved performance of policing resources and response systems. • Set up within STA and the industry liaisons with the Police, so STA can actively play a role to ensure better responses to complaints.
Opportunities		
<ul style="list-style-type: none"> • To support and enhance the "Safer Samoa" public relations campaign. • For the Samoa Police to nominate a Tourism Liaison Officer to enable better 	<ul style="list-style-type: none"> • Improved social behaviour. • Enhanced visitor comfort and security. • Improved reputation as a safe destination. 	<ul style="list-style-type: none"> • Implement, maintain and monitor. • Position possibly to be installed within the Community policing Program.

SWOT	Strategic Implication	Response Required
understanding of and response to tourism issues.		
Threats <ul style="list-style-type: none"> The negative aspects that can come with increased tourism visitation (e.g. prostitution, drugs paedophilia, drunkenness). Potential for adverse imagery of theft, wild dogs, tropical diseases, urban violence, and suchlike being conveyed to and misunderstood by markets. 	<ul style="list-style-type: none"> Deterioration of social well being. Local resentment and disaffection with tourist and tourism sector. Adverse potential visitor perceptions of the destination. 	<ul style="list-style-type: none"> Risks need to be recognised and understood. Strategies to be developed to minimise and mitigate occurrences. Ensure that a hotel background check of employees is incorporated within the accreditation standards. Emphasise positives and publicise advancements e.g. in wild dog control initiatives.

SWOT	Strategic Implication	Response Required
<i>Planning, information sources and impact management</i>		
Strengths		
<ul style="list-style-type: none"> History of planning and research already in existence. Newly re-established Research and Statistics Division in 2008 within STA. 	<ul style="list-style-type: none"> Foundations and lessons to build upon. 	<ul style="list-style-type: none"> Reassess past planning for guidance and continuing relevance. Continue to identify and refine research needs and capacities.
Weaknesses		
<ul style="list-style-type: none"> Lack in recent years of reliable tourism statistics and reports for planning purposes 	<ul style="list-style-type: none"> Limited ability to plan strategically, to monitor and respond to needs changes and trends. 	<ul style="list-style-type: none"> Continue the development and refinement of the recently re-established STA Research and Statistics Division. Extend research and accounting to specifically encompass continuing mechanism for reporting: <ul style="list-style-type: none"> Tourist expenditure survey Tourism employment survey Tourism satellite accounting Build compliance requirements and operational protocols across all areas of Government to ensure data capture and appropriate transmission and communication to the STA Research & Statistics Division. Build research data capture and monthly (or quarterly) reporting systems utilising industry contributed activity levels. Ensure accuracy, integrity and confidentiality of industry contributed intelligence.
Opportunities		
<ul style="list-style-type: none"> For Government and industry operators to be better informed as to visitor patterns and behaviours and market trends. 	<ul style="list-style-type: none"> Sound base for future strategy development. 	<ul style="list-style-type: none"> Build research data capture and monthly (or quarterly) reporting systems utilising industry contributed activity levels. Ensure accuracy, integrity and confidentiality of industry contributed intelligence. Ensure communication of research results to industry operators.
Threats		
<ul style="list-style-type: none"> Risk that ideally required research inputs from industry operators might not be 	<ul style="list-style-type: none"> “Garbage in, garbage out” meaning incorrect data will also draw incorrect 	<ul style="list-style-type: none"> Educate operators as to benefits of accurate participation and ensure

SWOT	Strategic Implication	Response Required
forthcoming or might not be accurate or correct.	conclusions	research data collection systems can preserve integrity and confidentiality.

SWOT	Strategic Implication	Response Required
<i>Human resources, industry capabilities and standards generally</i>		
Strengths		
<ul style="list-style-type: none"> • A reasonable (but limited) supply of good competent existing industry operators. • Very good training facilities now available at Australia Pacific Technical College (APTC). 	<ul style="list-style-type: none"> • Availability of industry leaders and business partners with opportunities for collaboration and leverage. • Opportunity to significantly address difficulties of skills undersupply and standards improvement. 	<ul style="list-style-type: none"> • Create and support strategies for structured industry cohesion e.g. framework of Industry Associations. • Support existing training programs and initiatives to introduce <i>gap filling</i> courses, and on the job training programs tailored to the needs of properties.
Weaknesses		
<ul style="list-style-type: none"> • Relatively few industry operators have a detailed understanding of customer needs or of the importance of quality standards. • The shortage of appropriate skills and qualified management and operations personnel across all sectors within the industry and at all employment levels. • Local wage rates for skilled workers are very low by world standards. Already sparse skills are further depleted by virtue of migration of skilled workers to other destinations (NZ and Australia) where they can derive higher rates of pay. 	<ul style="list-style-type: none"> • Potential failure to either attract or retain customers. • Less than optimal word of mouth referral • Potential loss of yield and financial sustainability. • Serious disincentive to potential owner operator investors. • Potentially adverse product and service standards and resultant loss of customer satisfaction. • Potential for benefits of training to be lost and not realised in the sector within Samoa. 	<ul style="list-style-type: none"> • Specialist "intender" and ongoing training specifically targeted at both potential and existing tourism and service business owners and operators. • Train the trainer programs. • Incorporation of "quality" management in all business qualification curricula. • Development of "How To" guides and support tools and materials. • Educate operators on staff career path planning and retention initiatives. • Consider review and amendment of labour legislation as regards minimum wage and employment conditions.
Opportunities		
<ul style="list-style-type: none"> • To increase skills availability. • To improve product and service delivery standards. 	<ul style="list-style-type: none"> • Enhanced visitor experience and destination reputation. • Enhanced visitor experience and destination reputation. 	<ul style="list-style-type: none"> • Examine and implement mechanisms for incentives to employers that enable their staff to participate in training programs. • Establish an aspirational accreditation program administered by STA that confers "preferred" operator status to operators achieving accredited standards.
Threats		
<ul style="list-style-type: none"> • New tourism product developments becoming established without incremental skills development. 	<ul style="list-style-type: none"> • Risk that new developments of any description might have the effect of draining experienced personnel from existing operators. 	<ul style="list-style-type: none"> • Engage the existing educational institutions to launch, reinforce and continue tourism related courses.

SWOT	Strategic Implication	Response Required
Aviation Access		
Strengths		
<ul style="list-style-type: none"> Good scheduled direct aviation access from key source markets New Zealand, Australia, American Samoa and good service via Fiji Proposed Upolu-Savaii air services Open skies air service agreements with Australia and New Zealand. All other relevant Air Services agreements are also in place. US Singapore, Dubai, Tonga, Niue, Fiji, Tuvalu, and Kiribati. Agreements are very open and not restrictive. 	<ul style="list-style-type: none"> Firm foundation for targeting core markets along all scheduled access routes. Need to ensure continued route viability in order to maintain services and frequencies. Greater opportunities to develop Savai'i options as both mono-destination and inclusion on an Upolu holiday. Foundations laid for ease of entry without regulatory constraints. 	<ul style="list-style-type: none"> Partner with all carriers, ensure good communication channels and shared strategy, research and information flow. Collaborative promotional activities. Incorporate into marketing campaigns, encourage packaging. Proactively seek increased airline capacity.
Weaknesses		
<ul style="list-style-type: none"> Relatively long flight times mean that aircraft loading capacities are limited to well below full seating capacities of available aeroplanes. 	<ul style="list-style-type: none"> Capacity constraints particularly in peak seasons. Ticket pricing needs to be higher to retain yield rates to aircraft operator. Destination is less competitive. 	<ul style="list-style-type: none"> Promote on basis of uniqueness, distinct competitive advantages and value.
Opportunities		
<ul style="list-style-type: none"> To increase aviation services and carrying capacities. Inter Island Airways is in process of becoming permanently licensed from simply charter operator. 	<ul style="list-style-type: none"> Increased access, increased capacities and increased frequencies <ul style="list-style-type: none"> As above 	<ul style="list-style-type: none"> Establish partnership task force between STA and SAA to identify and investigate possible new airline access to Samoa. Build business case and promote to target carriers. Proactively encourage increased new airline entry in the Samoan market. To explore and target opportunities for Charter series to assist in servicing possible emerging new markets e.g. China, Japan and others. Establish partnership communications and collaborative strategies for development of target markets and segments.
Threats		
<ul style="list-style-type: none"> Air New Zealand Los Angeles - Apia 	<ul style="list-style-type: none"> Potential loss of US and European market 	<ul style="list-style-type: none"> Work in partnership with Air New Zealand

SWOT	Strategic Implication	Response Required
<p>service is under threat.</p> <ul style="list-style-type: none"> • Volatility of fuel prices. • Climate change impact on perceptions in the market place. 	<p>share.</p> <ul style="list-style-type: none"> • Potential for increased airfares and potentially reduced demand. • Increasing consumer concerns in relation to climate change, and carbon emissions from long haul air travel, potentially giving rise to a decline in demand particularly from the northern hemisphere markets. 	<p>and other reliant South Pacific destinations (Tonga), to initially subsidise the service, target marketing initiatives towards building sustainable route viability.</p> <ul style="list-style-type: none"> • Monitor, consider scope for subsidies, and/or costs reductions in taxes and other imposts e.g. landing charges etc. • Identify and establish eco-efficiencies and environmental sustainability of Samoa, which can be promoted effectively as "offsets" or "carbon credit".

SWOT	Strategic Implication	Response Required
Accommodation and hospitality		
Strengths Accommodation: <ul style="list-style-type: none"> • High availability of accommodation stock, particularly in Apia • Good spread of accommodation style from budget backpacker to Deluxe Resort style Hospitality: <ul style="list-style-type: none"> • Exceptional quality locally produced and organic character of tropical fruits and vegetables. 	<ul style="list-style-type: none"> • Strong availability to meet existing and short term forecast demand and to accommodate over runs on occasions of "spikes" of exceptional demand (e.g. business conferences or sporting events etc) • Opportunity to extend another dimension to the visitor experience. 	<ul style="list-style-type: none"> • Promote availability and range. • Encourage development of "tastes of Samoa" cuisine as a promotable part of the Samoan Experience.
Weaknesses Accommodation: <ul style="list-style-type: none"> • Imbalance in accommodation stock. Surplus budget and standard to superior standard accommodation, and relative shortage of deluxe style. Many smaller properties and very limited range of larger properties. Over supply in budget to superior standard accommodation in Apia. • Shortage of larger properties. • Significant issues and variances and lack of conformity exist between accommodation properties in relation to standards, ratings and quality. STA rates on the basis of categories of Budget, Standard, Superior Standard, Deluxe and Beach Fales. The SHA website categorises accommodation types by names different from those used by STA. A draft standards and rating system has been developed by STA but it does not at this stage have Board endorsement. STA inspections have clearly demonstrated that there are numerous instances where properties are failing to meet standards applying to ratings categories that the 	<ul style="list-style-type: none"> • Diminished business viability of some properties. Capacity constraints of 'boutique' properties limit ability to take up potential increases in demand. • Diminished capacity to appeal to group business and in-market wholesalers who prefer to deal in "volume" business. • Less than optimal visitor satisfaction and word of mouth referral. 	<ul style="list-style-type: none"> • Undertake capacity study and develop capacity development plan. • Actively seek out and support reputable developers of larger style properties. • Implement and promote standards and rating scheme. Legislate to support aspirational accreditation and in essence preferred operator status. • Support and widely advertise existing incentives, laws and regulations, include all legislation in the STA website.

SWOT	Strategic Implication	Response Required
<p>properties are being marketed at.</p> <p>Hospitality:</p> <ul style="list-style-type: none"> Quality of food service is inconsistent and frequently quoted by visitors in exit surveys as "terrible to average" in respect of both food quality and variety and personal service. 	<ul style="list-style-type: none"> Less than optimal visitor satisfaction and word of mouth referral. Missed opportunity to capitalise on the "value add" that could be there with the "tastes of Samoa" from quality local produce. 	<ul style="list-style-type: none"> Increased focus on Food and Beverage preparation and service. Training and ongoing educational programs for business owners on the significance of food as part of the visitors overall "Samoa" experience.
<p>Opportunities</p> <p>Accommodation</p> <ul style="list-style-type: none"> Larger properties. Specialised or themed properties e.g. wilderness retreat <p>Hospitality:</p> <ul style="list-style-type: none"> To develop a "taste of Samoa" or "Samoa Taste Sensations" cuisine as part of the Samoa experience, focussing on the exceptional quality of locally produced seafood, tropical fruits and vegetables, pork etc. 	<ul style="list-style-type: none"> Greater capacities and appeal to wholesalers and group markets. Creation of a point of difference and greater product variety and choice. Potential to build upon and add value to the "Samoa experience" as another point of competitive advantage. 	<ul style="list-style-type: none"> Undertake capacity study and develop capacity development plan. Actively seek out and support reputable developers of larger style properties. Identify possible sites, themes, developers. Promote the use, and promotion, of local produce (fruits, vegetables, seafood, taro, yams, banana's etc) within hotels and restaurants.
<p>Threats</p> <ul style="list-style-type: none"> Poor product and / or service presentation and delivery. Failure to deliver upon the promise. Uncontrolled development in terms of excessive densities, heights; architectural design not in keeping with the themes and flavours of a nature based and eco sensitive and sustainable destination management. 	<ul style="list-style-type: none"> Less than optimal visitor satisfaction and word of mouth referral. Potential loss of visual amenity and diminishment of the "authenticity" of the "Samoa Experience" 	<ul style="list-style-type: none"> Implement and promote standards and rating scheme. Legislate to support aspirational accreditation and in essence preferred operator status. Support and widely advertise existing incentives, laws and regulations, include all legislation in the STA website. Ensure incorporation within town planning regulations as to design covenants in keeping with themes and flavours of a nature based and eco sensitive and sustainable destination presentation and management.

SWOT	Strategic Implication	Response Required
Terrestrial attractions, activities and transport		
Strengths <ul style="list-style-type: none"> Exceptionally attractive and appealing pristine natural environment. A relatively broad base of tour and activity operators. Taxis and buses are safe and clean and subject to twice yearly inspections by LTA. 	<ul style="list-style-type: none"> Foundation for theme of nature based destination. Imperative that the pristine environment be protected and preserved by application of principles of sustainability. Potential to appeal to a broad range of activity seekers. Comfort and ease of mobility readily accessible and available to consumers, no apprehension. 	<ul style="list-style-type: none"> Sustainability and environmental conservation will become increasingly important for the community and the tourism industry as visitation to Samoa increases. Sustainable industry and lifestyle require sound conservation values, and acceptable environmental management and controls. Training is required. Environmental impact assessment to be considered in relation to all developments for any purpose. Incorporate range and availability of activities within promotional campaigns. Develop refined marketing strategies to target consumers with particular interests in particular activities e.g. Surfing, diving, trekking and others. Incorporate reference in promotional materials.
Weaknesses <ul style="list-style-type: none"> Feedback from visitors indicates a need for more diversity of activities. Lack of quality information for tour guides to provide quality interpretative experiences for tourists. Limited directional and tourism trail or points of interest roads signage. Inconsistent application of entrance fees to places of interest both throughout the country and indeed at the same attraction. Taxi fares are not metered. 	<ul style="list-style-type: none"> Less than optimal visitor experience and satisfaction, diminished word of mouth referral, diminished repeat visitation. The destination is less competitive in the marketplace. Less than optimal visitor experience and satisfaction Less than optimal visitor experience and satisfaction Visitor confusion and potential sense of being ill treated. Less than optimal visitor experience and satisfaction. Open to abuse by some dishonest 	<ul style="list-style-type: none"> Develop strategies to increase the availability and diversity of activities and experiences that a visitor can enjoy. Include the capitalisation of these activities in current laws and regulations. Establish: <ul style="list-style-type: none"> Higher level tour guide training capacities. Tour guiding interpretative materials. Tour guiding accreditation structures. Install good general and tourism specific directional signage. Regulate, publish, advertise and display entrance rates fees and work closely with community leaders. Regulation of taxi industry to ensure fair

SWOT	Strategic Implication	Response Required
<ul style="list-style-type: none"> Very few limousines available for hire. 	<ul style="list-style-type: none"> drivers. Possible gap in supply, possible opportunity. Not considered material at this stage. 	<ul style="list-style-type: none"> charges and to facilitate continuing upgrade of services to international visitor requirements and expectations. Ensure that taxi operators are aware that serious breaches could result in licenses being terminated. Consider appropriate strategies to address issues.
Opportunities		
<ul style="list-style-type: none"> To develop a greater diversity of activities as available for visitors to participate in e.g. water sports, bush walking trails, horse riding, cultural appreciation etc. To develop a Cultural Centre attraction as a showcase and cultural "keeping Place" of Samoan culture and heritage. To develop and promote village cultural experiences. Continue to investigate opportunities and processes required to attain "World Heritage" listing for key natural asset attractions. To develop walking, biking, horse riding tracks, resting points, interpretative signage and viewing platforms etc in National Parks. Consider possibility of user pays systems of entry fees, levies and suchlike. 	<ul style="list-style-type: none"> Greater reach in market appeal, enhanced visitor satisfaction and word of mouth referral. Potential showcase of Samoan culture and history which partially fills the gap in visitor need for cultural and arts and crafts appreciation. Further meets visitor demand for cultural experiences, directly involves village communities in the business and revenues of tourism. Significant uplift in marketability. New experiences and activities, potential increase in length of stay, greater appeal to niche "walking" market segment, enhanced visitor satisfaction, possibility of revenue receipts in order to assist funding development and maintenance. 	<ul style="list-style-type: none"> Identify desired activities, relevant agencies, potential sites. Investigate feasibility. Identify and promote to potential developers and operators. Identify champions both within Government and the broader community. Assess demand and consider feasibility. Facilitate establishment of a program that identifies village opportunities, assesses feasibility and assists in implementing and managing. Liaise with SBEC and DBS. Continue to consider, investigate, and implement if appropriate. Consider and assess feasibility. Liaise with MNRE.
Threats		
<ul style="list-style-type: none"> Some nightclubs are potentially "firetraps" Beaches and other land attractions lack warning signage in relation to potentially 	<ul style="list-style-type: none"> Public and workplace health and safety. Reputation risk. Risk to resident and visitor personal safety. Reputation risk. 	<ul style="list-style-type: none"> Establish and enforce fire safety regulations and standards. Incorporate requirements within accreditation framework. Facilitate risk identification and signage. Encourage operators to regularly advise

SWOT	Strategic Implication	Response Required
dangerous currents and other hazards.		<p>visitors of danger zones within the property if any.</p> <ul style="list-style-type: none"> • Incorporate into accreditation framework for private tourism operators.

SWOT	Strategic Implication	Response Required
Marine attractions, activities and transport		
Strengths <p>Cruise Shipping:</p> <ul style="list-style-type: none"> Good port facilities and good existing base of visitation to build upon. Eleven cruises visited in the June to December 2008 season. Cruise guest feedback is that "Apia is one of the few ports where we feel welcome" <p>Activities:</p> <ul style="list-style-type: none"> Strong reputation amongst enthusiasts as an "iconic" surfing destination. <p>Other:</p> <ul style="list-style-type: none"> Strong legislative base already exists for protection of marine areas. Samoa is a Whale and turtle friendly nation. 	<ul style="list-style-type: none"> Well equipped with surplus capacity to accept considerable uplift in visitation. High level of visitor satisfaction, good word of mouth referral. Platform to build upon. Sustainability culture and practices are well underway in Samoa. 	<ul style="list-style-type: none"> Cruise ship working group established and to lead strategy development. STA to continue with meet and greet program, SPA to continue with stalls. Targeted niche market segment marketing and promotions. Publicise, include in promotions and visitor information materials.
Weaknesses <p>Cruise shipping:</p> <ul style="list-style-type: none"> Shortage of shopping options. Apia is not a duty free port. Salelologa can only accommodate small cruise ships 100m or less. No passage through fringe reef on southern side of Upolu to allow for tenders to access beach from moored cruise ships. <p>Other marine:</p> <ul style="list-style-type: none"> Limited supply of marine activities and tour options. <p>Information:</p> <ul style="list-style-type: none"> Limited interpretative information and materials for tour guides to provide quality interpretative marine experiences for tourists. <p>Public transport:</p> <ul style="list-style-type: none"> Public ferry to Salelologa needs improved 	<ul style="list-style-type: none"> Possible opportunity to earn retail expenditure being missed. Capacity limitations. Potential limitation to sub regional dispersal of cruise ship benefits to South of Upolu. Potential opportunity. Possible opportunity to earn expenditure being missed. Less than optimal visitor experience. Possible missed opportunity for employment of marine biologists and tour guides. Less enhanced resident and visitor experience. 	<ul style="list-style-type: none"> Develop the STA Fale as a centre for cultural displays and arts and crafts exhibits. Liaise with cruise operators as to alternative options. Consider in long range Port Development strategic master planning. Liaise with cruise operators as to alternative options. Undertake consumer research, identify opportunity and assess feasibility for additional activities. Facilitate development of interpretative materials. Undertake awareness campaigns of what are available such as Palolo Deep Marine Reserve and other sites. Improve capacities for managing people with special needs on the public transport

SWOT	Strategic Implication	Response Required
capacity for people with special needs.		vessels and across the full spectrum of public areas.
Opportunities Cruise shipping: <ul style="list-style-type: none"> • SPA forecasting 30% growth in cruise shipping in 2009 season alone. SPA is now actively promoting other parts of the islands as well as Apia. • To increase capacity and variety of shore based excursions, arts and crafts and other shopping options at these smaller local stops. 	<ul style="list-style-type: none"> • Opportunities for continued growth. • Greater visitor satisfaction, greater average spend per person. 	<ul style="list-style-type: none"> • Analyse results and develop strategies from the SPA questionnaire that was circulated to all cruise ship principals in late 2008. • Investigate, and develop strategy.
Threats <ul style="list-style-type: none"> • Risk of uncompetitive port charges or mooring fees, inability to appropriately service the requirements of cruise ship operators or their guests. 	<ul style="list-style-type: none"> • High charges can render port unviable, lack of service will cause destination to become uncompetitive. Need to keep abreast of all competitive and other relevant issues. 	<ul style="list-style-type: none"> • Build partnerships and constantly liaise with cruise ship operators. Monitor competitive port charges. Continue Cruise ship working group.

SWOT	Strategic Implication	Response Required
Land, business and investment		
Strengths <ul style="list-style-type: none"> Willingness of Government to streamline business investment. Samoa Land Corporation "land bank" of 24,000 acres freehold land available for sale and lease. 	<ul style="list-style-type: none"> Opportunity to coordinate one "all of Government" approach to business investment. Possible sites available for tourism investment and development, no difficulties of customary land ownership. 	<ul style="list-style-type: none"> National Investment Committee formed in order to coordinate national policies on development incentives. Identify particular sites of high tourism potential and publicise availability as part of the investment attraction program.
Weaknesses <ul style="list-style-type: none"> Over 80% of land in Samoa is under customary ownership. Foreign investment in tourism developments remains a complicated process. The lengthy process of obtaining land leases is frustrating for investors and potential developers. There remains a lack of clarity and therefore certainty, as to the extent of and eligibility for government sponsored investment incentives. Potential local developers who have access to potential attractions and points of interest are unable to develop these sites due to a lack of start up capital and collateral. Obtaining initial start up capital is also a complicated process. The shortage of appropriate skills and qualified management and operations personnel across all sectors within the industry and at all employment levels is a serious disincentive to prospective investors. Village community concerns about possible tourism developments within the village boundaries are complex and multi-faceted. Some of the key areas of concern include: <ul style="list-style-type: none"> Preservation of hereditary custom 	<ul style="list-style-type: none"> Potential investment in tourism development stalls or fails to realise. Further development is severely delayed; employment, skills development and career path development are constrained. Tourism market opportunities and export earnings are missed. Samoa's reputation as an investment destination suffers across all economic sectors. Missed opportunities. Diminished appeal as an investment destination. Community engagement required in order to address concerns, relieve fears and to develop opportunities for positive participation and benefits. <ul style="list-style-type: none"> Lack of community support for potential tourism development. 	<ul style="list-style-type: none"> Establish a coordination capacity to assist tourism (and other) developers better understand and resolve development and land issues particularly providing for: <ul style="list-style-type: none"> Security of tenure Certainty of title Definition, clarity and certainty of investment incentives Equity of incentives to all investors and sectors Community engagement and acceptance Benefits to community Dispute resolution Identify, publicise and facilitate access to venture capital and finance e.g. SBEC Loan Guarantee Scheme, Development Bank, commercials banks and others. Increase availability and extent of competencies and skills through: <ul style="list-style-type: none"> Training initiatives Imported labour programs where necessary and appropriate. Work with village leaders and communities, possible use of case studies from other destinations with success in similar circumstances. Development of "taster" or "toe dipping" opportunities that enable the people in

SWOT	Strategic Implication	Response Required
<ul style="list-style-type: none"> ▪ and title ▪ A lack of appreciation (and hence potentially fear,) of the actual implications of tourism development and visitation ▪ A lack of appreciation of commercial principles required by investors and of the styles of corporate structures and business models that are capable of being applied for development and ongoing operations. • Business financial returns are often less than optimal and less than might represent an acceptable return on capital invested. 	<ul style="list-style-type: none"> • Potentially inefficient investment, missed benefits of higher yielding alternative investments. 	<ul style="list-style-type: none"> the villages to "test the waters" and experience the implications of tourism in a staged and low impact manner. By way of example, encourage community involvement through cultural villages within resorts and hotels or tour programs that take tourists into the village. • Development of pre-packaged "template" business structures and models which have pre considered and developed mechanisms that appropriately manage the issues and concerns. • Provide strategic leadership with identification of strategically focussed and higher yielding investment opportunities in keeping with market needs. Educate operators in market assessment, competitive analysis and business planning skills.
<p>Opportunities</p> <p>Investment:</p> <ul style="list-style-type: none"> • To formally establish tourism representation on the Investment Committee of the Revenue Board. • To appropriately resource MCIL to enable effective establishment as a key point of contact, reference and referral for interested potential investors and developers. To also act as central point of coordination of government policy and regulation for investment. <p>Business:</p> <ul style="list-style-type: none"> • To integrate concepts of minimum standards within the business licensing regime of MOR. • To refine strategic focus and target higher yielding markets and market segments. <p>Land:</p> <ul style="list-style-type: none"> • To identify possible tourism development 	<ul style="list-style-type: none"> • To represent tourism interests to strengthen liaison. • Less stress for potential investors, greater ease of feasibility assessment, and certainty and therefore greater comfort for security of investment. • Uplift in product and service standards, enhanced visitor experience and greater word of mouth referral. • Targeting increasingly higher end developments will attract increasingly higher end visitors with greater spend giving greater yield to operators. • Potential to actively market opportunity 	<ul style="list-style-type: none"> • Consider and if appropriate, implement. • Consider and if appropriate, implement. • Consider and if appropriate, implement. • Develop a matrix that integrates "development" targets with "market attraction" targets. • Liaise with SLC and establish key

SWOT	Strategic Implication	Response Required
<p>sites from land held by Samoa Land Corporation</p> <p>Land, business and investment:</p> <ul style="list-style-type: none"> • To establish an integrated investment attraction program (either generically, or for tourism projects exclusively). Program to encompass: <ul style="list-style-type: none"> ▪ Identified investment opportunity ▪ Pre feasibility assessment ▪ Potential for Public / Private partnerships. ▪ Promotional strategy for seeking investment. 	<ul style="list-style-type: none"> • for investment and / or respond to enquiring potential investors. • Proactive and selectively targeted approach to investment attraction, possible fast tracking of development projects and continuing industry development. 	<p>preferred character of desired developments, identify land and devise strategy for attracting investment.</p> <ul style="list-style-type: none"> • Consider and if appropriate, implement.
<p>Threats</p> <ul style="list-style-type: none"> • Regulatory processes and/or policies, land ownership issues cause excessive difficulties or concerns for investment certainty or security for investors. 	<ul style="list-style-type: none"> • Loss of potential investors, reputation as "investor unfriendly" or high risk destination. 	<ul style="list-style-type: none"> • Strengthen partnerships with land owners through close collaboration with the Ministry of Natural Resources and Environment and the Ministry of Women, Community and Social Development. • Capitalise on opportunities presented by the Unit Title Legislation. • Strengthen awareness programs on the potential benefits of leasing customary land for tourism development.

SWOT	Strategic Implication	Response Required
Infrastructure		
Strengths		
<ul style="list-style-type: none"> • Good communications. • Usually reliable infrastructure. • Transport regulatory regime has recently been overhauled. New Land Transport Authority became operational in early 2009. A wish-list of roads has been identified. 	<ul style="list-style-type: none"> • Reliability of good communication to all stakeholders. • Visitor comfort and convenience factor is good. Not a hardship destination. • Improving accessibility to points of interest. 	<ul style="list-style-type: none"> • Maintain pace with competitors. • Publicise in visitor information materials. • Prioritise wish list for points of interest with greatest potential demand and yield.
Weaknesses		
<ul style="list-style-type: none"> • Continuing dependency on both Diesel generator and hydro electric power generation and occasional electricity load shedding. • Limited accessibility to broad band and high speed internet facilities. • There is a need to improve public facilities particularly within the towns and at points of high interest and visitation. • There is a need to review and seek improvement to supply lines that service some aspects of the tourism industry e.g. readiness of availability of critical replacement spare parts and machinery repair and maintenance. 	<ul style="list-style-type: none"> • Occasional outages and possibly less than optimal visitor experience. • Less than optimal visitor convenience and satisfaction. • Potential for improved convenience and satisfaction and enhance cleanliness. • Unacceptable operator down time with result that both operator and visitor lose. 	<ul style="list-style-type: none"> • Include accurate reference in visitor information materials. • Support infrastructure development. • Support infrastructure development. • Educate operators in risk management planning.
Opportunities		
<ul style="list-style-type: none"> • To establish infrastructure in the character of roads, water, toilets and other public facilities, walking trails, viewing platforms, interpretative signage etc at existing and potential points of attraction e.g. in National Parks 	<ul style="list-style-type: none"> • Supplementary activities for visitors; enhanced visitor satisfaction. 	<ul style="list-style-type: none"> • Consider and assess feasibility through liaison with MNRE.
Threats		
<ul style="list-style-type: none"> • Systems failures 	<ul style="list-style-type: none"> • Dislocation and reputation risk. 	<ul style="list-style-type: none"> • Maintain risk management and contingency plans.

SWOT	Strategic Implication	Response Required
<i>Shopping and visitor support services</i>		
Strengths		
<ul style="list-style-type: none"> • Good availability of health care skills and general life needs facilities. 	<ul style="list-style-type: none"> • Greater visitor comfort and security. 	<ul style="list-style-type: none"> • Publicise in visitor information materials.
Weaknesses		
<ul style="list-style-type: none"> • Limited "authentic Samoan" arts and crafts availability apart from Apia markets. 	<ul style="list-style-type: none"> • Less than optimal visitor satisfaction and missed opportunity. 	<ul style="list-style-type: none"> • Engage private sector operators such as Janets, Aggies and others in developing this sector. • Encourage extended range of locally produced stocks available at duty free shop at airport.
Opportunities		
<ul style="list-style-type: none"> • To better understand consumer service needs and retail preferences. 	<ul style="list-style-type: none"> • Improved consumer satisfaction levels. 	<ul style="list-style-type: none"> • Undertake consumer research program and develop appropriate response strategies.
Threats		
<ul style="list-style-type: none"> • Risk to visitors of tropical diseases e.g. malaria and typhoid are endemic 	<ul style="list-style-type: none"> • Risk to destination reputation. 	<ul style="list-style-type: none"> • Publicise risk warning and preventative health care precautions in visitor information materials.

SWOT	Strategic Implication	Response Required
<i>Institutional structures and support systems</i>		
Strengths		
<ul style="list-style-type: none"> Very stable political system and strong Government recognition of and financial support for tourism sector as a key economic driver. Strong partnerships continue evolving between STA and airlines and trade, reasonably strong cohesion within the industry particularly with the increasing development and activity of SHA and emerging development of other industry associations e.g. Beach Fale Association and the Car Rental Association. Active participation in the SPTO and PATA. Proven ability to effect reform of laws and institutions. 	<ul style="list-style-type: none"> Strong comfort factor of certainty to visitors, operators and potential investors. Increasingly improved communication channels, industry unification and leadership and leveraging opportunities such as cooperative marketing campaigns. Excellent support mechanisms Desire to advance and improve, willingness and not afraid to change. 	<ul style="list-style-type: none"> Publicise in visitor information and investor information materials. Cultivate and nurture. Maintain and support participation in SPTO and seek to optimise benefits of membership particularly in relation to promotional activities and research intelligence. Constantly look for better ways. Exercise initiative and be prepared to propose change in the knowledge of a supportive system.
Weaknesses		
<ul style="list-style-type: none"> Samoa Tourism Legislation has become outdated and is in need of review and reform. In particular the legislation needs to put in place powers and legal mechanisms that enable better structured and controlled development and ongoing management of tourism facilities, products and operations. Whilst there is willingness across all tiers of Government to see an "all of Government" approach to tourism development, there are presently few structured specialist tourism development communication channels. This has given rise in some instances to less than 	<ul style="list-style-type: none"> Government is currently constrained in relation to some aspects of tourism development and ongoing management and operations in that it is not legally empowered to do certain things. Failure to optimise available synergies of bureaucracy. Potential for: <ul style="list-style-type: none"> Less than optimal product development Possible customer dissatisfaction 	<ul style="list-style-type: none"> Review Tourism legislation in accordance with the Legislative review currently in progress and as required, develop communications policies, protocols and structures that enable the interests of tourism development to be better understood and factored in to operations and policies of all relevant Government departments and agencies. Build relationships; Establish and improve relevant communication processes, share knowledge and concepts. On an 'as and when' required basis, establish occasional special purpose 'Tourism Task Forces' (TTF's) with capability to address and resolve inter-

SWOT	Strategic Implication	Response Required
<p>optimal circumstances of tourism development. By way of example, business licences might be issued although that the particular business does not comply with the "standards" that STA is seeking to impose from both a consumer protection perspective and from a risk management perspective.</p>	<ul style="list-style-type: none"> At present STA becomes actively engaged in and expends resources on activities for which it is clearly ill equipped. It does so simply because there are real or potential implications for the visitor's Samoa Experience e.g. control of wild dogs and administration of the Miss Samoa Pageant. Industry cohesion and collaboration is limited. Samoa Hotels Association has been making valuable and constructive contributions but is limited in its resources and representational membership base of a limited number of accommodation providers only. Other industry associations are in their relatively formative stages and are also relatively limited in resources. There is only limited and informal communication or linkage between the respective industry associations. 	<p>departmental policy, protocols and operational issues pertaining to specific tourism matters. Taskforces should be ad hoc and draw upon persons most relevant to the specific issue at hand.</p> <ul style="list-style-type: none"> There needs to be a process and communication channels created whereby when an issue arises, the agency that is most appropriate and best resourced and competent to assume responsibility to deal with it, can be clearly identified and empowered to act as might be required. STA to engage the private sector for a viable private sector operator before STA disengages.
<p>Opportunities</p> <ul style="list-style-type: none"> To seek greater industry cohesiveness by facilitating "an all of industry" representational body or alliance of existing representational bodies. 	<ul style="list-style-type: none"> Greater industry cohesiveness, industry leadership, improved communication channels, networking and mentoring opportunities. 	<ul style="list-style-type: none"> Liaise with industry bodies; formulate draft alternative models for consideration.
<p>Threats</p> <ul style="list-style-type: none"> Risk of Government budget constraints. 	<ul style="list-style-type: none"> Reduced effectiveness, potentially lower 	<ul style="list-style-type: none"> Constantly monitor and report economic

SWOT	Strategic Implication	Response Required
<ul style="list-style-type: none"> • Risk of industry representational bodies failing to survive. 	<ul style="list-style-type: none"> • reach of marketing efforts, potentially reduced presence and awareness in the markets. • Potentially reduced cooperative initiatives and efficiencies, lack of industry unity. 	<p>performance of tourism sector. Maintain support media and public relations campaign as to the importance of the sector.</p> <ul style="list-style-type: none"> • Maintain strong channels of communication with industry organisations; investigate possibility of more formal communication e.g. "Working together" Memo of Understanding or Board appointments.

Demand side: SWOT analysis, strategies and actions

SWOT	Strategic Implication	Response Required
<i>Planning and information sources</i>		
Strengths		
<ul style="list-style-type: none"> • Current budgetary allocation allows for re-establishing Research & Statistics division within STA. 	<ul style="list-style-type: none"> • Renewed capacity to undertake and interpret research. 	<ul style="list-style-type: none"> • Instigate consumer and market research based marketing plans that are strategically focussed towards source markets, demographics, and psychographics.
Weaknesses		
<ul style="list-style-type: none"> • Lack in recent years of reliable tourism statistics and reports for planning purposes due to reliance on the provision of data from other ministries which places tourism information secondary to their own core requirements. • Virtually total absence of recent detailed consumer preferences research. 	<ul style="list-style-type: none"> • Limited ability to plan strategically to monitor and respond to changes and trends. 	<ul style="list-style-type: none"> • Continue the development and refinement of the recently re-established STA tourism research division. • Build compliance requirements and operational protocols across all areas of Government to ensure data capture and appropriate transmission and communication to the STA Research & Statistics division. • Build research data capture and monthly (or quarterly) reporting systems, utilising industry contributed activity levels. Ensure accuracy, integrity and confidentiality of industry contributed intelligence
Opportunities		
<ul style="list-style-type: none"> • In addition to building on increasing numbers of visitors, to also strategically focus on building yield and return from increasing: <ul style="list-style-type: none"> ▪ Average length of stay (ALOS), ▪ Average spend per visitor (\$/pax) ▪ Repeat business <p>To draw upon research and lessons from regional tourism bodies such as PATA, SPTO,</p>	<ul style="list-style-type: none"> • Potentially more efficient effect of marketing spend in as much as it is far easier to achieve extra yield from an existing customer than it is to get a new customer. • Good market intelligence and support strategic materials without significant 	<ul style="list-style-type: none"> • Develop ALOS yield specific strategies and educate and encourage industry operators as appropriate. Strategies to include: <ul style="list-style-type: none"> ▪ Don't discount, instead offer specials packages e.g. "stay 3 nights get the fourth one free" Incremental yield comes from incremental on-spend on food and beverage, touring, shopping etc from the extra length of stay. ▪ Optimise Savai'i add on options • Utilise.

SWOT	Strategic Implication	Response Required
UNWTO and others.	cost.	
Threats		
<ul style="list-style-type: none"> • Drawing the wrong conclusions and getting the strategies wrong. 	<ul style="list-style-type: none"> • Less than optimal results. 	<ul style="list-style-type: none"> • Constantly monitor and reassess; build formality into planning reviews at least 6 monthly.

SWOT	Strategic Implication	Response Required
Target markets and market segments		
Strengths		
<ul style="list-style-type: none"> Strong existing and increasing visitation from core markets of New Zealand, Australia, and American Samoa. Strong (captive) VFR sector from people worldwide of Samoan heritage. Reasonably solid history of visitation from UK, Europe and North America and reasonable connectivity. Exceptional natural beauty and pristine environment, coupled with worldwide trends towards ecotourism products and adventure and experiential tourism. Similarly, worldwide trends of increased availability of leisure time, more frequent and more exotic travel patterns and marketplace desire for new cultural experiences. 	<ul style="list-style-type: none"> Sound base to start from and build upon. Sound base to start from and build upon. Good base to build upon. Opportunity to tailor marketing themes and campaigns. 	<ul style="list-style-type: none"> Give principal focus to core markets, secondary focus to secondary markets and so forth. Ensure target marketing plan is market specific and responsive to in-market research and trends. Build VFR specific strategies e.g. "2012 – Samoa Homecoming year" themed campaign with an appropriate calendar of supporting events. Continue secondary market focus and contract in-market representation. Gear marketing themes and campaigns towards the nature based and cultural experience that the customers are trending towards.
Weaknesses		
<ul style="list-style-type: none"> Relatively limited destination knowledge in the marketplace and therefore extremely limited word of mouth referral. Generally speaking, all South Pacific island holidays are perceived as roughly equal in terms of sun, sea, surf, and sand, particularly for families in most source markets. 	<ul style="list-style-type: none"> Diminished destination competitiveness. Samoa is at competitive risk given distance and relative cost. 	<ul style="list-style-type: none"> Marketing and promotional activities to differentiate destination and sell on basis of unique competitive advantages. Gear product development and marketing towards selective higher end of markets. Distinguish Samoa as a "special" destination, not a "me too" destination.
Opportunities		
<ul style="list-style-type: none"> To distinguish Samoa as a destination. To investigate possible new source markets e.g. China, Japan and to investigate possibility of occasional 	<ul style="list-style-type: none"> Greater competitive advantage, potentially higher yield, lower social impact of visitation. Potential to initially tap market and establish some word of mouth referral interest. 	<ul style="list-style-type: none"> Build and market the Samoan Experience as a unique, exotic nature based, aspirational "must do" experience complete with bragging rights. Identify outbound charter operators and seek to establish interest.

SWOT	Strategic Implication	Response Required
charter flight series.		
Threats <ul style="list-style-type: none"> Competition from all other tropical island style destinations and particularly those of the South Pacific e.g. Fiji, French Polynesia and Cook Islands. 	<ul style="list-style-type: none"> Potential loss of market share. 	<ul style="list-style-type: none"> Samoa has to identify a stronger comparative advantage over its neighbouring countries.

SWOT	Strategic Implication	Response Required
<i>Destination marketing and promotion capacities and resources</i>		
Strengths		
<ul style="list-style-type: none"> Excellent award winning and very appealing and informative website. Wholesalers throughout the world and particularly in NZ and Australia are looking for alternative and new destinations for their clients. Increase in aviation capacities from New Zealand and Australia has increased promotional activity and spend from each of the competing airline companies. Active collaboration of particularly hoteliers in SHA. 	<ul style="list-style-type: none"> A strong base to build upon. Potential to offer Samoa as a truly "new" destination with particular appeal for the more experienced traveller. Greater exposure of Samoa in the marketplace, opportunity for leverage of marketing spend. Potential to lead and coordinate industry spend. 	<ul style="list-style-type: none"> Continue to build and incorporate interactivity as a key platform in overall promotional thrust. Identify target wholesalers, establish communication techniques and implement. Strong communication and collaborative marketing with airlines and coordination of marketing themes and drive; cultivate and encourage tourism operators to "package" air/land deals. Ensure SHA and other industry bodies are completely informed as to current marketing targets and themes and seek to ensure that all players are in tune and following much the same targets and sending messages that are consistent.
Weaknesses		
<ul style="list-style-type: none"> Limited number of larger capacity hotel properties translates to limited ability to appeal to travel trade wholesalers who are looking for more profitable volume sales capacities. Opportunities for group travel are also limited. Relatively few industry operators have any detailed understanding of marketing techniques generally or of tourism specific marketing and distribution channels. New accommodation facilities have frequently been established on a "build it and they will come" philosophy. Very limited strategic marketing by way of "special" offers or packaging of products. Some perceptions of consumers from long haul markets of Europe, Asia and North America as to air transport links 	<ul style="list-style-type: none"> Lesser wholesaler interest. Less than optimal business results, Missed opportunities. Limited alternatives to appeal to consumers, potential cost inhibitors. Reduced sales conversion and visitation. 	<ul style="list-style-type: none"> Promote on basis of uniqueness, and potential for growth, seek out investors for larger developments and keep market and trade abreast of anticipated developments. Facilitate education; build knowledge and capacities at all levels. Educate as to deal offer options and encourage packaging e.g. Air, accommodation, activities, Upolu with Savai'i extensions and vice versa. Ensure addressed in promotional materials e.g. visiting journalist information packs.

being difficult, infrequent, unreliable and expensive. <ul style="list-style-type: none">There is still reasonably limited collateral material available for delivery of visitor information.	<ul style="list-style-type: none">Less than optimal availability of tools for destination promotion.	<ul style="list-style-type: none">Build collateral to support marketing and promotional initiatives.
Opportunities <ul style="list-style-type: none">To become more market segment targeted in both product presentation and marketing themes and activities.Continuing website development and increasing use of electronic technology.Potential incremental industry marketing and promotional spend that could be expected from any major new property investments.Leverage tourism promotional benefit off Government overseas missions, sports teams and other Samoa delegates travelling overseas.Develop "all of Government" culture, and strategic partnerships, to maximise public relations opportunities.Utilise famous expatriate Samoans e.g. "The Rock", Rugby and other sporting legends, Miss Samoa, etc in promotional campaigns and appearances.	<ul style="list-style-type: none">Improved effectiveness and efficiencyTo significantly expand distribution and support an electronic marketplace for both trade and consumers.Potentially greater exposure of Samoa in the marketplace.Greater exposure with cost efficiencies.Greater exposure with cost efficienciesTo leverage off reputation and market drawing power.	<ul style="list-style-type: none">Research, identify segments and build matrix of preferences messages and media.Develop web based marketing strategy as cornerstone for building awareness and effectiveness particularly in target primary, secondary and tertiary markets and with other consumers throughout the world.Seek to support and coordinate marketing initiatives and spend.Establish internal protocols between agencies enabling communication to STA of all Samoan foreign delegations, utilise where possible and appropriate.As above.Identify celebrities and negotiate engagement.
Threats <ul style="list-style-type: none">Budget constraints	<ul style="list-style-type: none">Reducing marketing activities.	<ul style="list-style-type: none">Engage actively in those promotional activities that have no cost or are most cost effective.

SWOT	Strategic Implication	Response Required
<i>Brand "Samoa" and destination image management</i>		
Strengths		
<ul style="list-style-type: none"> Strong imagery exists in VFR market and limited "pockets" in other source markets, reasonably strong visitation over many years. Good links with the Robert Louis Stevenson history and the inclusion on the 100 things to do before you die list. 	<ul style="list-style-type: none"> A firm base to build upon, already some strong word of mouth referral history. 	<ul style="list-style-type: none"> Factor components of past successes into brand development strategy.
Weaknesses		
<ul style="list-style-type: none"> Only limited knowledge of awareness of Samoa as a holiday destination in key target markets. Virtually no knowledge in secondary and tertiary markets. Often first recall is of rugby and warrior chiefs rather than genuine leisure appeal. In some instances consumer recognition has been adversely influenced by adverse media publicity in relation to such matters as the wild dog problem, or of suburban violence in Samoan communities in Australia and New Zealand. Brand and reputation difficulties from the ".WS" website which is a pornography site. 	<ul style="list-style-type: none"> Need for definition of brand components to be developed and clearly and consistently communicated to markets. Need to establish the "value proposition" in the eyes of the consumer. Negative market appeal. Negative market perceptions. 	<ul style="list-style-type: none"> Define the brand. Build on the concept of the Samoan Experience. Ensure brand is communicated and uniformly adopted by all within the industry. Actively work together with other key Government agencies and organisations in combating wild dog problem and emphasise positive progress particularly with visiting journalists. Emphasise positive aspects of Samoan culture including strong family and religious values. Regularly check and Disassociate these sites.
Opportunities		
<ul style="list-style-type: none"> To establish the Samoa brand and image in markets. 	<ul style="list-style-type: none"> To build the brand and image that Samoa prefers and to tailor it in a manner that will appeal as competitively advantageous in key strategically targeted source markets and segments. 	<ul style="list-style-type: none"> Undertake a "branding" exercise, implement and promote.
Threats		
<ul style="list-style-type: none"> Risk of inconsistent or misleading images of the Samoa experience in target markets. Risk of negative publicity which would follow on from any natural disaster such 	<ul style="list-style-type: none"> Damage to destination brand and imagery with potential loss of market. As above. 	<ul style="list-style-type: none"> Development of clear and well communicated brand strategy. Development of Natural disaster tourism communications and media recovery plan

as a cyclone or tsunami.		which ensures formal channels of communication are established between all relevant disaster management agencies. This ensures that correct and accurate information is being quickly communicated to visitors and potential visitors.
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