

SAMOA TOURISM SECTOR PLAN 2014-2019



Prepared by Samoa Tourism Authority

SAMOA
The Treasured Islands of the South Pacific

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List of Acronyms

ADB	Asian Development Bank	NUS	National University of Samoa
ADD	Activity Design Document	NZAP	New Zealand Aid Programme
APTC	Australia-Pacific Technical College	OAG	Office of the Attorney General
AQF	Australian Qualification Framework	PEEP	Promoting Energy Efficiency in the Pacific
CBS	Central Bank of Samoa	PPP	Public Private Partnership
CDC	Cabinet Development Committee	PSET	Post School Education and Training
DBS	Development Bank of Samoa	PSSF	Private Sector Support Facility
DSC	Duty Concession Scheme	PUMA	Planning and Urban Management Agency
EPC	Electric Power Corporation	SAA	Samoa Airport Authority
GDP	Gross Domestic Product	SAT	Samoa Tala
GEF	Global Environment Facility	SBEC	Small Business Enterprise Centre
GFC	Global Financial Crisis	SBS	Samoa Bureau of Statistics
GSTC	Global Sustainable Tourism Council	SCoC	Samoa Chamber of Commerce
HRD	Human Resource Development	SDS	Strategy for the Development of Samoa
ICTP	In-Country Training Programme	SHA	Samoa Hotels Association
	Industry Development and Investment	SIDS	Small Island Developing States
IDIPD	Promotion Division	SLC	Samoa Land Corporation
IFC	International Financial Council	SME	Small and Medium Sized Enterprise
IFC	International Finance Corporation	SOEs	State Owned Enterprises
ITC	International Trade Centre	SPA	Samoa Port Authority
IVS	International Visitor Survey	SPTO	South Pacific Tourism Organisation
LTA	Land Transport Authority	SQA	Samoa Qualifications Authority
MCIL	Ministry of Commerce Industry and Labour	SQF	Samoa Qualification Framework
MCIT	Ministry of Communications and Information Technology	SSC	Samoa Shipping Corporation
MESC	Ministry of Education Sports and Culture	SSDP	Samoa Sanitation and Drainage Project
MfR	Ministry for Revenue	SSFA	Samoa Sports Facility Authority
MNRE	Ministry of Natural Resources and Environment	SSTA	Samoa Savaii Tourism Association
MoF	Ministry of Finance	STA	Samoa Tourism Authority
MoH	Ministry of Health	STDP	Samoa Tourism Development Plan – 2009 - 2013
MoPP	Ministry of Police and Prisons	STSP	Samoa Tourism Support Program
MoT	Ministry of Tourism	STSP	Samoa Tourism Sector Plan 2014 - 2019
MPMC	Ministry of Prime Minister and Cabinet		Samoa Tourism Workforce Development Plan 2010 - 2012
MTC	Manufacturing Trade and Commerce	STWDP	
MTEF	Medium Term Expenditure Framework	SWA	Samoa Water Authority
	Ministry of Women, Community & Social Development	TA	Technical Assistance
MWSCD		TBC	To Be Confirmed
MWTI	Ministry of Works Transport and Infrastructure	TCRP	Tourism Cyclone Recovery Program
		TDA	Tourism Development Areas
NBC	National Beautification Committee	TH	Tourism and Hospitality
NESP	National Environmental Sector Plan 2013-2017	TMT	Tourism Marketing Taskforce
NGO	Non-Government Organisation	PI	Tourism Price Index
		TPRP	Tourism Led Poverty Reduction Program
NHS	National Health Service	TSCU	Tourism Sector Coordination Unit
NISP	National Infrastructure Strategic Plan		

TSSC	Tourism Sector Steering Committee	UNWTO	World Tourism Organisation
TTRP	Tourism Tsunami Recovery Programme	USA	United States of America
TTT	Tourism Training Taskforce	VERT	Voluntary Emergency Recovery Team
	Technical Vocational Education and	VFR	Visiting Friends and Relatives
TVET	Training	WB	World Bank
TVET	Technical Vocational Education and Training	WIBDI	Women in Business Development Incorporated
TWG	Technical Working Group	YTD	Year To Date
UN	United Nations		
UNEP	United Nations Environment Programme		

FOREWORD



It gives me great pleasure to present the Samoa Tourism Sector Plan (STSP) 2014-2019.

The Plan brings to the fore the various key aspects of the tourism industry, which continues to emerge as the major engine of economic growth 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 five years.

The Samoa Tourism Sector Plan lays the foundation for the coordinated and sustainable development of tourism for Samoa. In the Strategy for the Development of Samoa (SDS), Tourism is recognised as one of the Key Outcomes under Priority Area One.

It is an area where the government has placed great emphasis, as tourism hold much potential for future growth. Great benefits are envisaged and have already been realised from this very important sector. It supports employment, provides foreign exchange and builds the economy of Samoa.

The rapid growth of tourism over recent decades presents both challenges and opportunities. No part of the globe is now untouched by tourism as one of the world's biggest industries and that includes the Pacific region.

In a dynamic global environment, the Samoa Tourism Sector has identified the priorities for its development by establishing a collective strategic approach. This approach incorporates all relevant stakeholders and other areas of Samoa's economy, and continues to preserve existing markets, attract new market segments and develop new products.

The Plan articulates a Vision that **'By 2019, Samoa will have a growing tourism sector, which engages our visitors and people and is recognised as the leading Pacific destination for sustainable tourism'**. The Plan's strategic aim is to encourage more visitors to spend more money which will lead to increased growth and sustainable tourism development. The Plan establishes a roadmap to deliver on this Vision, but achieving this will require commitments from all stakeholders.

In order to manage and develop tourism in a sustainable way, we need to be able to measure the benefits tourism is bringing to the economy and how we can make Samoa an even more attractive destination to visitors from around the world.

The Plan will assist all tourism stakeholders to better plan and develop their investments, whether these be in the private sector, in tourism products, or government investment in marketing, training and infrastructure.

We are grateful to the Government of New Zealand for its ongoing support, through the Samoa Tourism Support Programme (STSP). I believe that this partnership will continue and great benefits will be realised for all the people of Samoa, as tourism is everyone's business.

Faafetai,

A handwritten signature in black ink, reading 'Tuilaepa Sailele Malielegaoi'. The signature is fluid and cursive, with a long horizontal line extending to the left.

Tuilaepa Sailele Malielegaoi
MINISTER OF TOURISM AND PRIME MINISTER OF SAMOA

Executive Summary

Introduction

This Samoa Tourism Sector Plan (STSP) establishes a framework for the development of tourism in Samoa for the five year period from 2014 – 2019. This Plan has been prepared to document clear priorities for tourism sector development and establish the stakeholder roles, mechanisms and resourcing requirements to support a sector based development approach. A phased approach has been adopted for implementation of the STSP, with a number of Immediate Priorities established for the first two years of the Plan.

The priorities identified in this document have been developed following a review of the previous Tourism Sector Plan (Annex A) and have also drawn on numerous existing studies including tourism specific studies and existing government policies and plans in key areas including infrastructure, trade and industry and education. The development of this Plan has also been supported by wide ranging stakeholder consultation.

Outline and Content

A thorough Situation Analysis for the sector has been undertaken and is presented in Section Three. The Situation Analysis documents the performance of the sector and identifies the key characteristics of the demand and supply sides of the sector, as well as analyzing growth prospects and establishing sector targets.

The Strategic Direction for the tourism sector is presented (in Section Four), to establish the high level vision, goals and objectives for the sector. The Strategic Direction has been developed based on the consultation process, together with an analysis of the current situation and potential for tourism development in Samoa.

Five programme areas have been identified and these form the structure for the analysis of the key sector issues and the STSP recommended actions (Section Five) as follows:

- Marketing and Research
- HRD and Training
- Investment and Business Enabling Environment
- Product Development
- Transport, Infrastructure and Access

The linkages between the five programme area goals, outcomes and outputs are presented in the logframe in Annex B; detailed Action Plans have also been prepared outlining the priority activities, responsibility and indicative budget (Annex C). The required sector management structure is outlined in Section Six and the monitoring and evaluation mechanisms in Section Seven. An overview of resourcing requirements is provided in Section Eight and the Medium Term Expenditure Framework is provided in Annex D. A Monitoring and Evaluation Framework is presented in Annex E.

Sector Development Context

Tourism in Samoa is already a major contributor to the economy. Tourism expenditure in Samoa was estimated by the Central Bank to be worth approximately \$SAT 339 million in 2012; this equates to approximately \$SAT 2,500 per visitor and accounts for 20 percent of GDP.

The total number of tourists¹ to Samoa peaked at almost 135,000 in 2012. However there was a decline in arrivals in 2013 to approximately 124,500. This decline has largely been due to:

- The substantial impact on the market from the effects and publicity associated with Cyclone Evan;
- A warmer than usual autumn period in New Zealand which suppressed demand for overseas tropical holidays;
- Continued tightening of the economic situation in Australia and New Zealand in the first six months of 2013 and the continued impacts of the GFC in long haul source markets of North America and Europe;
- Continued impact of the removal of transpacific services via Samoa by Air New Zealand; and
- A temporary uplift in arrivals to Samoa in 2012 from the 50th Independence Celebrations.

Tourism arrivals to Samoa have been growing at a slower rate than the rest of the Pacific region; the total volume of tourism arrivals to Samoa grew between 2008 and 2013 by approximately 2.1 percent per annum compared with the average for the region (SPTO members) of 3.2 percent per annum over the same period. This longer term trend in part reflects a range of impediments which are further outlined in Section Five.

Samoa has experienced a substantial increase in rooms supply over the last five years. Demand has not kept pace with the new supply level and average occupancy levels are low for many operators, which restricts capacity for new investment and product improvements. Whilst efforts to attract larger scale new investments to build critical mass are an important part of the mid-term development strategy, improving industry profitability will be key in the short term. Equally improving product quality is a key focus of this Plan; both through strengthening quality standards for accommodation and visitor attractions, as well as the development of new activities to broaden the appeal of Samoa in key markets.

The Sector Vision, Principles and Indicators

The Vision for the Tourism Sector under this Plan is *that 'By 2019 Samoa will have a growing tourism sector, which engages our visitors and people and is recognized as the leading Pacific destination for sustainable tourism'*.

Applying the principles of Sustainable Tourism Development (UNWTO) are integral to the achievement of this Vision. Reflecting the importance of the economic, social and environmental sustainability, a number of indicators have been developed for this Plan (Section Four), which focus on:

- Tourism expenditure and employment
- Market Size and Composition
- Visitor Satisfaction
- Community Engagement
- Environment Sustainability

Priority Actions

A number of priority actions (Section Five) are identified in this Plan which seek to address both the demand and supply side issues which impact on industry growth and sustainability. A phased approach has been

¹ In line with UNWTO definitions, international tourists to Samoa include the following purpose of visit; holiday, business, visiting friends and relatives, sports and other purposes.

developed through the identification of priorities across the five Programme Areas; High Priorities, will be implemented in the first two years and Medium Priorities will be addresses in Years Three to Five.

The key strategies and overall priority actions are summarised in the table below under the five Programme areas.

STSP Programme Area and Strategy	Actions
<p>Marketing and Research</p> <p>To grow demand and yield for the destination and its tourism products</p>	<p>HIGH PRIORITY</p> <ul style="list-style-type: none"> • Resource and implement the Samoa Five Year Marketing Strategy through an STA Annual Marketing Plan • Implement an ongoing tourism statistics, market research and intelligence program • Monitor the effectiveness of all marketing activities through specific KPIs • Review progress and support Annual Marketing Planning through an Annual Industry Marketing Forum
<p>Investment and Business Enabling Environment (BEE)</p> <p>To provide an enabling environment to support growth and investment in tourism related businesses</p>	<p>HIGH PRIORITY</p> <ul style="list-style-type: none"> • Improve internet speeds, cost and coverage through implementation of the IT Sector Plan <p>MEDIUM PRIORITY</p> <ul style="list-style-type: none"> • Implement the BEE recommendations of the MTC Sector Plan • Review tourism related utility charges • Develop and implement a Tourism Investment Strategy • Finalise amendments to land statutes and establish arbitration system • Increase linkages between primary producers and greater use of local products
<p>Product Development</p> <p>To support product improvements and new product development to meet market expectations</p>	<p>HIGH PRIORITY</p> <ul style="list-style-type: none"> • Develop and implement an integrated Product Development Program which focusses on: <ul style="list-style-type: none"> • Market Access and Product Distribution • Quality Standards • Training and Business Support Services • Finance • Develop Tourism Trails and activities including walking, driving and cycling • Further develop the STSP indicators through the GSTC Early Adopter Programme • Work with regional organisations to further develop the cruise shipping sector
<p>HRD and Training</p> <p>To provide education and training which supports industry and community needs</p>	<p>HIGH PRIORITY</p> <ul style="list-style-type: none"> • Develop and implement an Annual Tourism Industry Training Calendar • Increase e-marketing opportunities for operators through short courses and business mentoring • Develop and implement a Capacity Building

	<p><i>Plan for STA staff</i></p> <ul style="list-style-type: none"> • <i>Implement a broad based tourism community awareness program</i> <p>MEDIUM PRIORITY</p> <ul style="list-style-type: none"> • <i>Develop workplace training modules in priority areas and increase workplace training</i> • <i>Improve the NUS tourism training facilities</i> • <i>Increase linkages with overseas training institutions to build local capacity</i> • <i>Increase the scholarships available to NUS tourism and hospitality students</i> • <i>Provide training based on the revised STA training manuals</i> • <i>Introduce tourism as a compulsory subject in the secondary schools curriculum</i> • <i>Increase the number of tourism and hospitality scholarships available through donor programmes</i> • <i>Undertake a feasibility on establishing a dedicated NUS tourism and hospitality centre on Savaii</i> • <i>Revise and update the Samoa Workforce Development Plan</i>
<p><i>Infrastructure and Access</i></p> <p>To increase destination competitiveness through increased accessibility, infrastructure use and maintenance</p>	<p>HIGH PRIORITY</p> <ul style="list-style-type: none"> • <i>Finalise the scope and cost of Apia Waterfront development and phase implementation accordingly</i> • <i>Negotiate flight schedule improvements to Australia and New Zealand</i> • <i>Further review options to facilitate additional trans-Pacific air services</i> • <i>Support regional initiatives to better synchronise air schedules and connectivity</i> • <i>Facilitate improved internet speed, cost and coverage through the IT Sector Plan</i> • <i>Improve ferry services for tourists through on line booking, better signage and training of staff</i> <p>MEDIUM PRIORITY</p> <ul style="list-style-type: none"> • <i>Continue the implementation of the NISP medium term priorities</i> • <i>Develop Tourism Development Plans for Savaii and Upolu</i> • <i>Implement regulatory reforms in energy sector outlined in MTC Sector Plan</i> • <i>Support the adoption of renewable energy initiatives by tourism operators</i>

Implementation Arrangements and Budget

In order to better manage the implementation of the Sector Plan a three tier structure is outlined (Section Six); this structure will also support the monitoring and evaluation of the Plan as outlined in Section Seven. Tools developed to assist with the monitoring and measurement of the implementation of this Plan include the Logframe (Annex B), the Action Plans (Annex C) as well as the high level indicators outlined in Section Four.

In order to implement the recommendations of the STSP an increase in resourcing is required. This requires a level of commitment from the Government to grow the sector. Equally though the STSP is a partnership between the public sector, private sector and donors who each have their own role to play in supporting implementation.

High level budget estimates have been developed for the five year period of implementation, commencing in the financial year 2014/15. The budget estimates are illustrated below for each Programme Area by anticipated year of expenditure. The total budget over the five year period required for implementation is \$SAT 82.53 million².

STSP – Five Year Budget

	<i>Year One</i>	<i>Year Two</i>	<i>Year Three</i>	<i>Year Four</i>	<i>Year Five</i>
	<i>2014/15</i>	<i>2015/16</i>	<i>2016/17</i>	<i>2017/18</i>	<i>2018/19</i>
STSP Programme Area					
Marketing and Research	10.00	9.80	9.80	9.80	9.80
Business Enabling Environment and Investment³			0.52	0.30	0.30
Product Development	6.82	3.65	2.80	2.30	2.30
HRD and Training	1.55	1.55	2.48	2.10	1.78
Infrastructure and Access⁴	1.14	0.53	1.15	1.03	1.03
TOTAL⁵	19.51	15.53	16.75	15.53	15.21

A Medium Term Expenditure Framework (Annex D) has also been developed for the STSP to reflect the Programme activities, sequencing and the identified government and donor funding requirements.

Conclusion

The diagram below provides a summary of the Development Framework for the STSP together with a summary of targets and the budgetary requirements.

² This estimate is not inclusive of the potential costs of the redevelopment of the Apia Waterfront which is currently at the design stage.

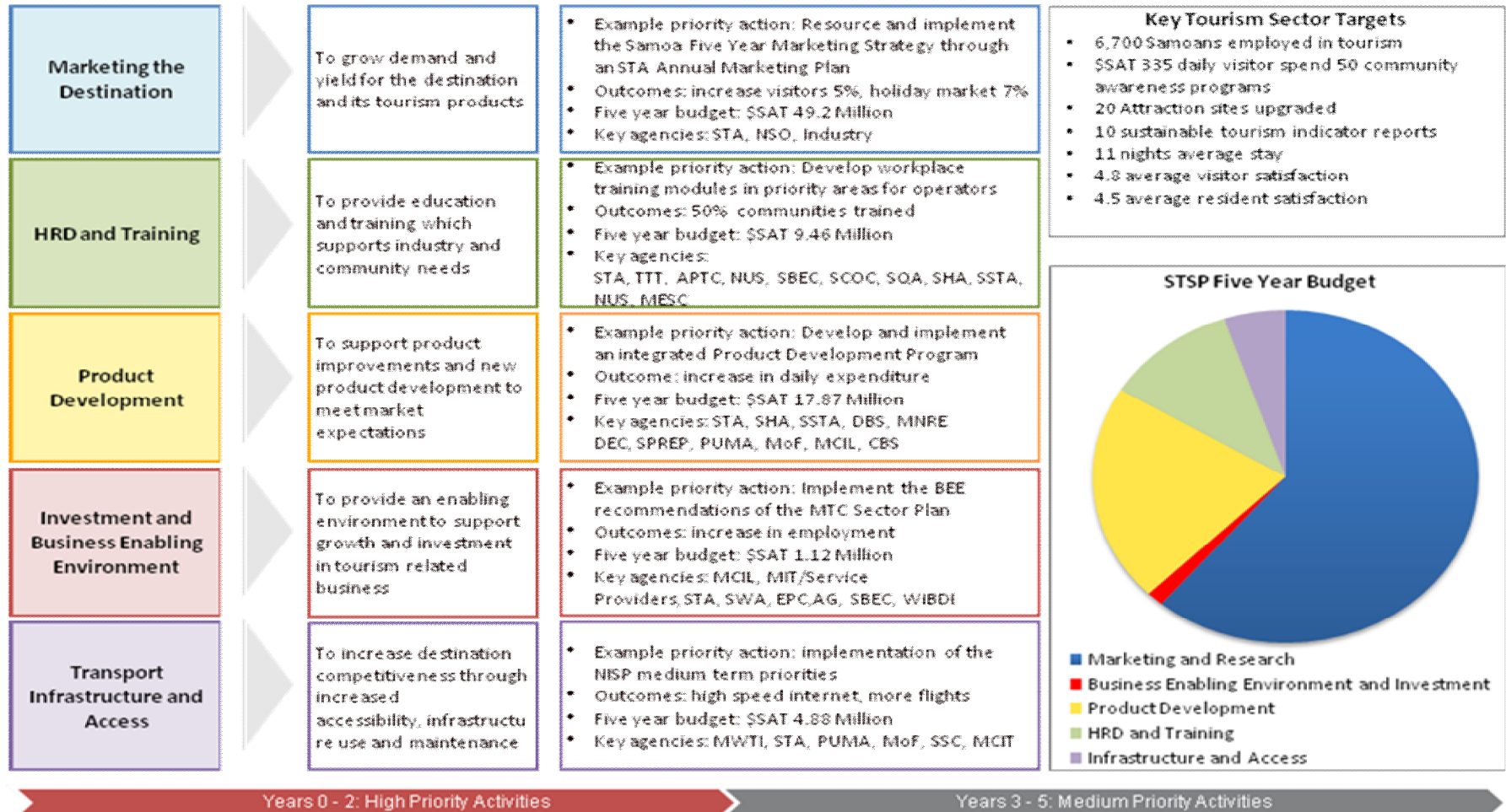
³ Excludes priorities already budgeted under MTC and MTIC Sector Plans

⁴ Excludes Infrastructure priorities already budgeted under NISP and Apia waterfront redevelopment

⁵ All figures in 2014 values with no adjustment for inflation

Samoa Tourism Sector Development Plan: 2014 to 2019

Vision: 'By 2019 Samoa will have a growing tourism sector, which engages our visitors and people and is recognized as the leading Pacific destination for sustainable tourism'.



1. Introduction

Tourism has been identified by the Government of Samoa, the private sector and many communities in Samoa, as the major economic development opportunity for the country. The tourism sector has the potential to support sustainable development within the country through broad based employment and income generation, as well as enhancing the retention of cultural traditions and the conservation and sustainable management of the nation's environmental assets.

This Samoa Tourism Sector Plan (STSP) establishes a framework for the development of tourism in Samoa for the five year period from 2014 – 2019. The development of this STSP has been led by the Samoa Tourism Authority (STA), as the lead agency for tourism in Samoa; however, the development process for the Plan has been highly participatory and has involved consultation with a wide range of stakeholders including industry operators, industry associations, NGOs and community consultation, as well as other government agencies. This Plan has been developed with the assistance of the New Zealand Government Aid Program (NZAP), through the Samoa Tourism Support Program (STSP).

Tourism is by nature a dynamic sector where internal and external factors can have a substantial impact on demand and development potential. Both global and local events of the last five years have served to reinforce the view that sector planning needs to be responsive to changing circumstances.

This Plan therefore also needs to be dynamic and responsive to changing internal and external circumstances. In order to achieve this the priorities and outcomes from the Plan require careful monitoring; changes over time, which lead to a more responsive Plan should be encouraged, as long as they support the achievement of the Vision and Outcomes highlighted within this document. This approach will also require a high level of sector coordination, monitoring and management.

The wide ranging engagement in the development of this Plan reflects the nature of tourism, which is cross sectoral and involves a wide range of stakeholders. The Samoan tourism product is essentially an experience, which involves all stakeholders in Samoa from the community level, through to numerous direct and indirect private sector suppliers, as well as a wide range of government agencies. The diverse components of the tourism product ensures that the tourism sector is difficult to coordinate and manage and wide ranging stakeholder support is required. These are some of the challenges which are outlined within this Plan.

The benefits of a coordinated and inclusive development process which manages the sustainable development of the sector are substantial, not only economically in terms of employment and foreign exchange earnings, but also in terms of supporting environmental conservation and management and strengthening cultural awareness.

Samoa has a fragile natural environment, strong communities and a unique culture; these assets need to be preserved as they form the basis not only of Samoan society, but also differentiate the destination product offering. Tourism development needs to balance economic objectives and the need to create employment, with wider social and environmental objectives; a balanced approach supporting all three sustainable pillars (economic, cultural and environmental) will underpin the future development of sustainable tourism through the implementation of this Plan.

This STSP outlines the requirements to facilitate a prioritised and coordinated approach to achieve sustainable growth for the development of the tourism sector in Samoa. This STSP is designed to facilitate sustainable growth by identifying and address sector related impediments, to facilitate increased employment and economic growth whilst supporting the cultural values and environmental assets of Samoa.

The focus for this Plan is the short to medium term covering within the next five years, to ensure practical and systematic measures are taken to build the tourism sector, and a sequenced and prioritized program of development is outlined to support implementation and monitoring. A phased and sequenced approach has been adopted through the identification of High and Medium Term Priorities for implementation; identified High Priorities are for implementation in the first two years and Medium Priorities are scheduled for Years Three to Five.

Addressing the identified constraints will not be easy, but the Government is fully committed to supporting recommendations included in this Plan. To achieve the goals established in this STSP however, will require the support of all stakeholders, in the public and private sectors, as well as the broader community.

2. Background

Government Development Policy

The overarching Government development strategy, *'the Strategy for the Development of Samoa 2012 – 2016'* highlights the main theme of *'boosting productivity for sustainable development'* to achieve the Vision of an *'Improved Quality of Life for All'*. Tourism has a major role to play in contributing to this outcome.

The development of Sustainable Tourism is highlighted in the SDS under Priority Area One: Economic Sectors and the following strategic areas are outlined:

- Improve destination promotion and marketing
- Ensure quality product and service delivery through implementation of tourism operators' standards
- Support and encourage the linkages amongst training providers to strengthen relevant training in the industry
- Enhance market access (connectivity and links)
- Improve tourism infrastructure
- Formulate a tourism and promotional investment policy
- Strengthen linkage between tourism and other sectors of the economy

The SDS indicates that *'Tourism plays a leading role in foreign exchange earning equivalent to over 20 percent of GDP....it also plays a significant role in the balance of payments, especially considering visiting friends and relatives as part of the tourism industry. Expenditure by tourists gives rise to revenue, encourages entrepreneurial opportunities, and helps promote and revive culture and branding. Tourism therefore has a multiplier effect at all levels directly and indirectly from the individual up to the macro level'*

The development and implementation of the STSP takes place against the background of the Tsunami in 2009 and Cyclone Evan in 2012 as well as the continued global economic effects of the GFC on both investment and propensity to travel. These internal and external factors have led to a challenging environment which the Samoan tourism sector will need to respond to, if sustainable tourism growth is to be achieved. However, as the SDS indicates *'There is considerable opportunity to grow the contribution and the flow-on benefits that come from being a recognized tourism destination.'*

Priority development activities identified within this STSP therefore aim to be realistic, but are fundamentally aimed at the achievement of the Vision for the tourism sector and the objectives of this Plan and the need to support the achievement of overarching Vision of an *'Improved Quality of Life for All'*.

Review of the Samoa Tourism Development Plan (STDP) 2009 – 2013

For the last five years, the tourism sector in Samoa has been guided by the Samoa Tourism Development Plan 2009 - 2013 (STDP). A review of this Plan was completed by the STA and endorsed by the Cabinet Development Committee (CDC) in August 2013 (Annex A). The review identified that substantial progress had been made in the implementation of the STDP, but that continued commitment to the ongoing implementation of priority activities in the focal areas of the Plan was required, namely in:

- Destination promotion and marketing
- Product, service and infrastructure development
- Resource management
- Access development
- Tourism capacity and workforce development
- Land, business and investment
- Research, planning and impact management
- Institutions and industry framework

The Review also identified the need for more specific indicators to be established to support the monitoring and evaluation of the further development of the sector under the next Plan.

STSP Development Process

This Plan seeks to build on the key initiatives identified in the previous STDP, as well others currently being undertaken by the Government, private sector and community stakeholders to support the further development of sustainable tourism.

This Plan has been prepared to document clear priorities for tourism sector development and establish the stakeholder roles, mechanisms and resourcing requirements to support a sector based development approach. In addition to the Review of the 2009 – 2013 STDP (Annex A), the approach and recommendations identified in this document has drawn on several previous tourism specific studies⁶, existing government policies and plans in key areas including in infrastructure, trade and industry and education.

The development of this Plan has been supported by wide ranging stakeholder consultation. A series of consultation workshops were undertaken on Upolu and Savaii in June and August 2013 with the support of the STA, industry associations, a wide range of government agencies, NGOs and community representatives. The outcomes from consultation with this wide range of stakeholder groups have also been incorporated into the STSP including comments provided by the Samoa Hotels Association through the *'Tourism Industry Issues Paper'* provided in July 2013. A public/private sector STSP Reference Group was also established and provided valuable input into the development of this Plan.

The Final STSP will be reviewed and approved by the Tourism Sector Steering Committee (TSSC) as well as by the CDC and Cabinet.

⁶ The most recent and comprehensive is the Samoa Tourism Sector Diagnostic (2010) undertaken by IFC but other key documents include the IVS 2012, the STA Five Year Marketing Strategy (2013), the Tourism Workforce Development Plan 2010 – 2012, Tourism Issues Paper prepared by the Samoa Hotels Association (August 2013) and the Policy Statements prepared by the Samoa Chamber of Commerce and Industry (July 2012).

3. Situation Analysis

Samoa and Sustainable Tourism

Samoa was an early pioneer of the concept of sustainable tourism management. In the late 1990s Samoa developed one of the first frameworks designed to measure and manage sustainability at the destination level, which included indicators and a monitoring system to track progress in Samoa over time. Samoa has recently benchmarked its' performance in the international context against the Global Sustainable Tourism Council destination criteria for sustainable tourism development. Samoa is the first Pacific country to adopt the GSTC criteria and only the second country in the world to do so at a national level.

The GSTC Evaluation (2014)⁷ demonstrated that *'Samoa has considerable systems and policies in place to practice, manage and monitor sustainable tourism. Now is the time for the destination to step up implementation, actualize its potential and garner competitive advantage that will lead to sustainable managed growth and enhanced benefit for the islands residents.'* The results of the GSTC evaluation *'demonstrate excellent performance and readiness to adhere to the GSTC criteria... Considerable progress has been made on the development of a foundation to manage sustainable tourism throughout the destination, including systems, organizational structures, policies and frameworks....The destination has the opportunity to further improve by focusing on core areas like visitor experience, standards and monitoring and marketing and communication.'* The specific recommendations highlighted in the GSTC Evaluation for Samoa have been incorporated into this Sector Plan, to strengthen the sustainable management and development of tourism.

The Economic Value of Tourism

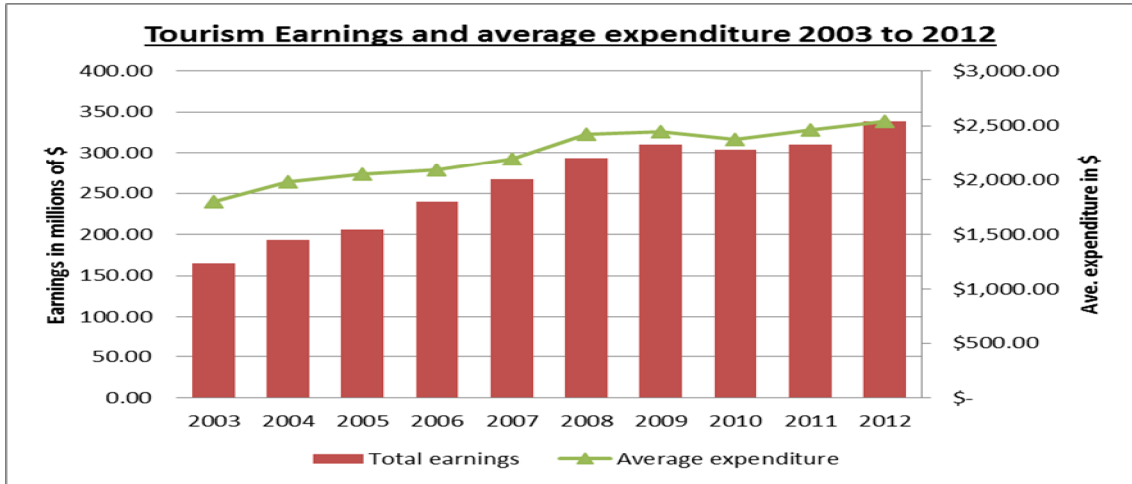
The Central Bank of Samoa uses the Samoa Tourism Price Index (TPI)⁸ to measure the level of prices that are relevant to tourists visiting Samoa and key categories assessed include:

- Accommodation
- Meals and drinks
- Car Rentals
- Other transportation
- Family obligations
- Miscellaneous

The TPI together with tourist arrivals is used as a basis for estimating total foreign exchange earnings for the sector by the Central Bank. The graph below indicates the estimates tourism earnings and average expenditure estimates for the period 2003 – 2012.

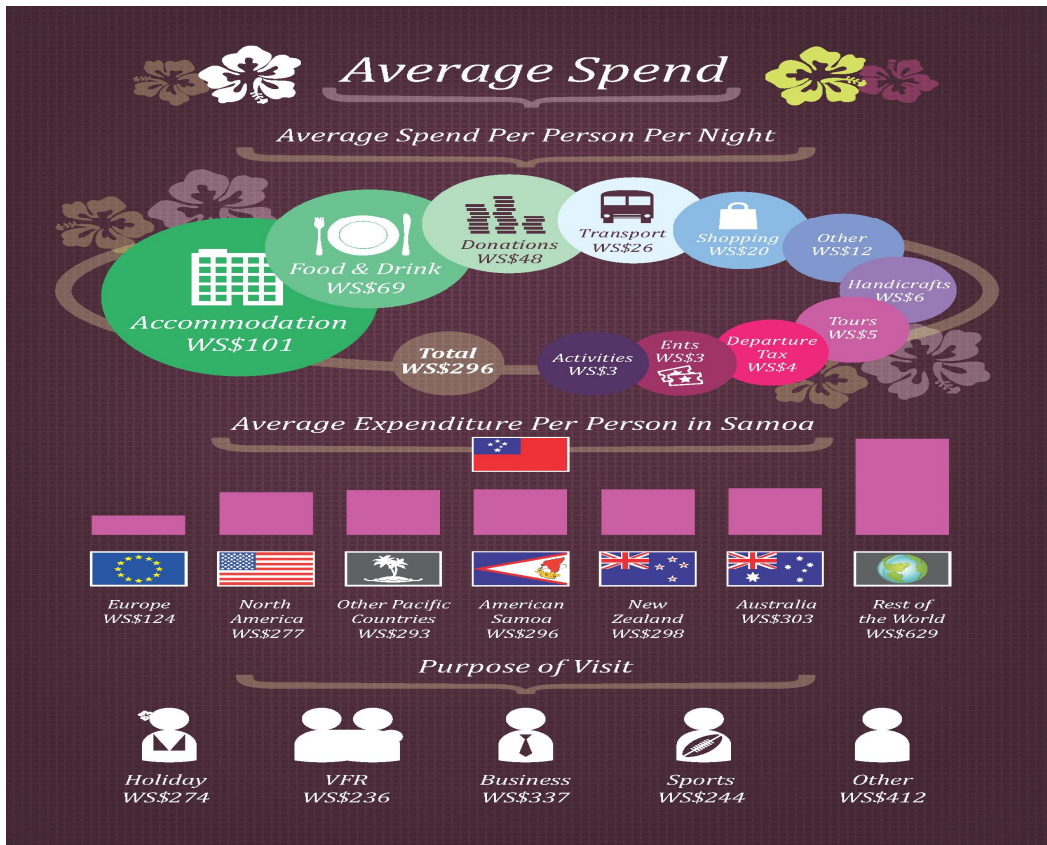
⁷ Global Sustainable Tourism Council Evaluation Report: Samoa – February 2014

⁸ The TPI is based on the results of the Tourism Survey that was conducted in 2002/03 by STA



Total expenditure is estimated to be worth approximately 20 percent of Gross Domestic Product and employment within the sector is estimated at approximately 5,000 full and part time jobs or just over ten percent of national employment. Within the tourism sector, the total number employed in the hotels and restaurants sector was estimated to be 1,700 in 2012.

Tourism in Samoa is already a major contributor to the economy. Tourism expenditure in Samoa was estimated by the Central Bank to be worth approximately 339 \$SAT million in 2012; this equates to approximately 2,500 \$SAT per visitor. The level of expenditure increased by 4.9 percent per annum between 2008 and 2012.



Preliminary estimates based on the 2012 International Visitor Survey (IVS) indicate that average daily expenditure was \$SAT 296 and the average length of stay per visitor was 10.4 days, equating to an average expenditure of \$SAT 3,078 per visitor. A breakdown of expenditure is provided in the diagram above.

Estimates based on the IVS data, indicate that tourism expenditure in 2012 would have been approximately \$SAT 414 million. These figures do not include any contribution from cruise ship visitors or domestic tourism expenditure.

The Tourism Market

The total number of tourists⁹ to Samoa peaked at almost 135,000 in 2012; in part this was due to increased arrivals for the 50th Independence Celebrations. However there was a decline in arrivals in 2013 to approximately 124, 500; this decline has largely been due to:

- The substantial impact on the market from the effects and publicity associated with Cyclone Evan – the decline was particularly evident in the first quarter of 2013 and in the New Zealand holiday market;
- A warmer than usual Autumn period in New Zealand which suppressed demand for overseas tropical holidays;
- Continued tightening of the economic situation in Australia and New Zealand in the first six months of 2013 and the continued impacts of the Global Financial Crisis (GFC) in long haul source markets of North America and Europe;
- Continued impact of the removal of transpacific services via Samoa by Air New Zealand;
- Impact of rescheduling of air services and airfare increases from major markets (Australia, New Zealand);
- A temporary uplift in arrivals to Samoa in 2012 from the 50th Anniversary Celebrations.

The level of arrivals to Samoa grew between 2008 and 2013¹⁰ by approximately 2.1 percent per annum; this is lower than the average for the region (SPTO members) which grew at approximately 3.2 percent over the same period.

Consumer and travel trade market research conducted in 2013 by independent consultants (under the New Zealand Government funded Samoa Tourism Support Program – STSP), indicates that there is a positive longer term outlook for the New Zealand and Australian markets and that there does not appear to be an underpinning reason for the decline in 2013 (other than those listed above).

The table below indicates the level of visitation by purpose of visit. Holiday and Visiting Friends and Relatives (VFR) dominate arrivals at approximately 77 percent of total arrivals in 2013.

Year	Holiday	VFR	Business	Other	Sports	Total	Change
2008	52,544	49,177	9,985	9,975	482	122,163	

⁹ In line with UNWTO definitions, international tourists to Samoa include the following purpose of visit; holiday, business, visiting friends and relatives, sports and other purposes.

¹⁰ The Survivor TV Series was also filmed in Samoa in 2009 and 2011; long term bookings by the film crew (from March to September) reduced the level of available tourist accommodation during these years; STA estimate an injection of approximately \$SAT 23 million per year from the Survivor series into the local economy, plus substantial overseas publicity.

2009	48,814	50,697	10,997	14,992	3,805	129,305	+5.85%
2010	48,730	50,405	11,738	16,823	1,804	129,500	+0.15%¹¹
2011	44,049	56,157	11,392	14,270	1,735	127,603	-1.46%¹²
2012	53,091	52,590	14,162	13,054	1,790	134,687	+5.55%
2013	45,321	44,897	11,677	20,402	2,376	124,673	-7.44%¹³
Change %	- 18.5	-2.3	+ 36.8	+ 88.9	+ 302	+2.05	

Growth in the VFR market segment over the last five years has declined by 2.3 percent, although the most substantial decline has been in holiday visitors (19 percent). Business, other and sports visitors have seen significant increases, but overall the total level of increase in arrivals has been modest at 2.1 percent (over the five year period).

The table below illustrates arrivals by purpose of visit and source market. Of the total holiday market, residents of New Zealand are the most significant segment, with 44 percent of all arrivals. New Zealand also dominates the VFR and Business segments. However, residents of Australia are marginally the most significant Sports tourists, whilst just over one third of all “Other” purpose trips (mainly transit and religious trips) are taken by residents of American Samoa.

Purpose of Visit by Place of Residence	Holiday (%)	VFR (%)	Business (%)	Sports (%)	Other (%)	Grand Total (%)
American Samoa	11.9	17.3	11.3	18.1	34.8	17.4
Australia	24.8	24.3	21.3	25.2	8.9	21.8
New Zealand	44.0	47.5	35.9	24.8	22.3	41.0
Other Pacific	2.0	2.8	13.9	22.7	12.6	5.4
North America	7.7	6.2	7.8	5.3	7.5	7.1
Europe	6.6	0.7	2.5	2.2	1.7	3.1
Rest of World	3.1	1.1	7.3	1.7	12.2	4.1
Grand Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: STA and NSO

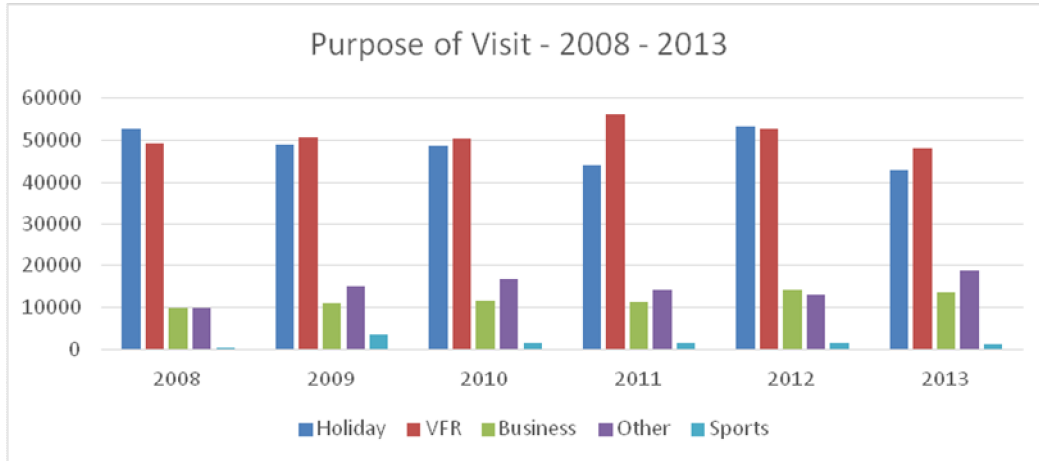
The main driver of tourism growth for the majority of Pacific countries has been an increase in holiday visitors. Those Pacific countries achieving above average growth rates and an increase in tourism have focused their efforts on the development of the holiday market. For Samoa the holiday market peaked in 2012 but is forecast to have a substantial decline in 2013 (see page Six for further explanation). However source market research (Australia and New Zealand – 2013) indicates that prospects for future growth remain positive.

¹¹ The impact of the 2009 Tsunami led to a substantial decline in supply and demand, particularly for Fale accommodation product

¹² A number of factors are considered to have had a negative impact on demand including accommodations restrictions due to survivor film crew uptake and the impact on outbound demand from New Zealand due to the Christchurch Earthquake and the Rugby World Cup.

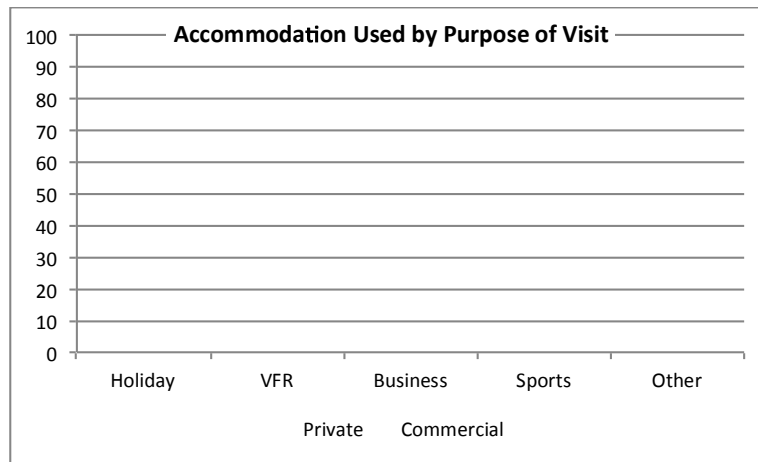
¹³ Cyclone Evan (December 2012) had a substantial impact upon the accommodation sector supply, as well as on demand from the major markets in the first six months of 2013

The VFR market is still the major market segment in terms of visitation although this peaked in 2011 and is forecast to show modest decline in 2013. The VFR is difficult to influence and grow substantially, as it is primarily influenced by family and social commitments and the level of discretionary income available to family and friends overseas. The graph below indicates visitation by purpose of visit for the last three years.



The 2012 IVS¹⁴ indicates that the average length of stay was 10.4 nights, with Holiday visitors staying on average 9.1 nights and VFR longer at 14.6 nights. By country of residence the longest length of stay was from Europe (12.3 nights), followed by Australia (12.2 nights).

The 2012 IVS also provides the most reliable method and data for estimating the use of commercial accommodation in Samoa¹⁵. The table below indicates accommodation use by purpose of visit and the results for the IVS indicate that 90 percent of holiday visitors use commercial accommodation, but that almost one third of the VFR segment also use commercial accommodation. Sports and Business visitors also have high commercial accommodation usage (at approximately 87 percent and 75 percent respectively).



Using the IVS data and arrival statistics indicates that the number of nights spent in commercial accommodation in Samoa is estimated as follows:

¹⁴ The IVS was undertaken among a sample of over 4,400 departing visitors in 2012/13, using a numerator assisted survey, with specific questions relating to the nights spent in commercial accommodation.

¹⁵ Not the estimates for commercial accommodation use published by using data gathered on the Arrivals Card have a high degree of unreliability due to the wording limited data gathered as well as the wording on the form which is open to

Purpose of Visit	Number of Visitors 2012	Percentage Staying in Commercial Accommodation	Visitor Nights in Commercial Accommodation#
Holiday	53,047	90 percent	207,679
VFR	52,542	32 percent	122,738
Business	14,151	74 percent	46,599
Other	14,824	59 percent	37,171

assumes average of 2 people per room

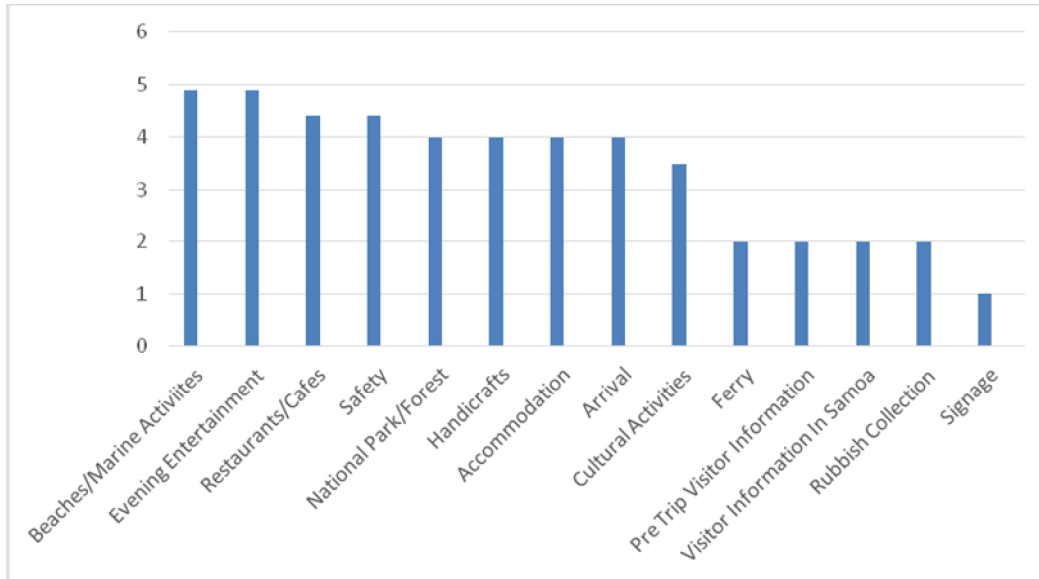
Accommodation occupancy data is collected by STA but datasets are incomplete due to incomplete returns by industry operators. The data that is available needs to be treated with caution due to limited response rate; however the available data indicates the following levels of occupancy by accommodation category:

Accommodation Type	2013 - Estimated Occupancy Level
Deluxe	52.1
Superior	57.2
Standard	24.5
Budget	22.6
Average (above categories)	39.1
Beach Fare	15.4

Visitor Satisfaction and Value for Money

Generally visitors have a high level of satisfaction with Samoa; the areas that scored at a low level include a lack of signage, unsightly rubbish, poor information in Samoa, limited pre trip information and an unappealing ferry trip to Savaii. Importantly the rating for cultural activities received only an average rating from visitors which indicates these activities need significant improvement. Samoa needs to capitalize more on its' strong cultural tourism component by developing and promoting higher quality cultural experiences and products.

The STSP must focus on improving all these aspects of the visitor experience over the next five years if sector growth is to be achieved. The graph below indicates the level of satisfaction for aspects of the tourism product based on the IVS 2013 respondents.



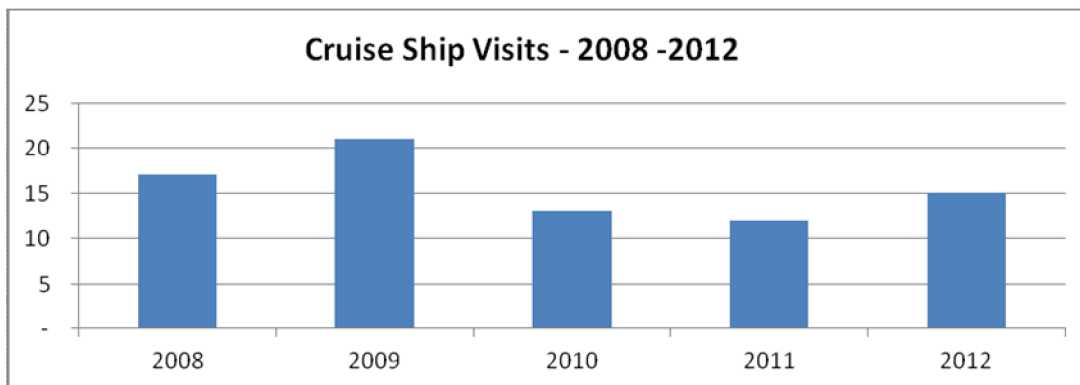
Overall the value for money was high at 4.4 out of 5, but there were significant variations between different components of the tourism experience as indicated below.

In general, Samoa rates well as a tourism destination by those who visit. This bodes well for potential to further develop the sector.

All tourists rated Samoa at 4.3 out of 5.0 when asked how likely it would be for them to return to Samoa. All tourists rated Samoa at 4.5 out of 5.0 when asked how likely it would be for them to recommend Samoa as a destination. Holiday tourists rated Samoa at the same level.

Cruise Tourism

The cruise market to Samoa is also relatively undeveloped compared to some Pacific destinations. Passenger numbers were recorded at 16,439 in 2012; no records are available for passenger numbers in previous years. The number of vessels has fluctuated between 12 and 21 in the last five years. Samoa is disadvantaged due to its relative geographic isolation from Australia and New Zealand in terms of the types of cruises which can be attracted and the majority of cruises are trans Pacific or round the world cruises.



STA is undertaking a Cruise Ship Visitor Survey in 2014 to further provide information on this important market.

Tourism Supply and Products

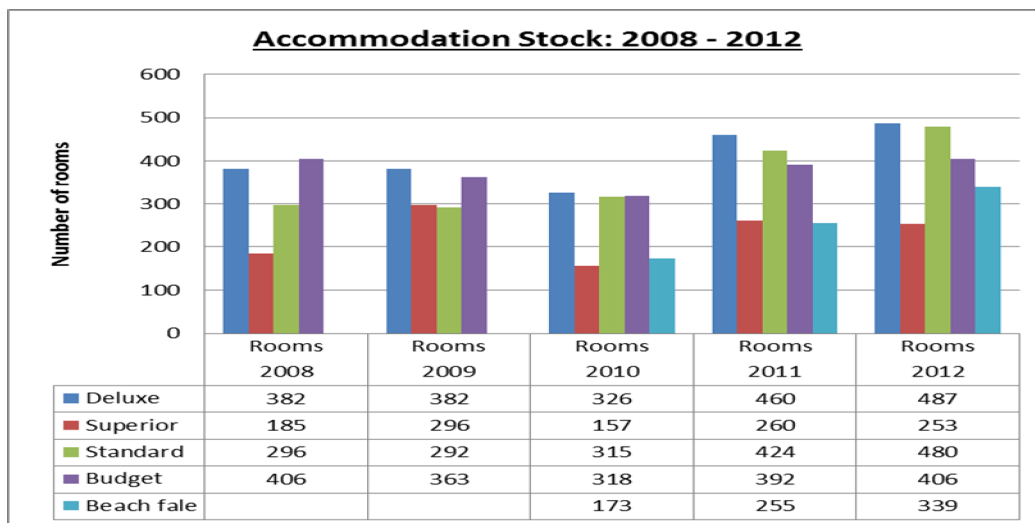
Accommodation Supply in Samoa

There are approximately 2,000 hotel rooms in Samoa of which 740 are in the deluxe and superior category, 890 are in the standard and budget categories and almost 340 are classed as fale.

There has been a substantial increase in accommodation supply in Samoa in the last five years. Prior to Cyclone Evan in December 2012, hotel supply had increased to 2,042 room, which was an increase of almost 50 percent over the supply in 2009. Capacity increases were as follows:

- Deluxe accommodation increased to 494 rooms, from 326 in 2009 (51 percent increase)
- Superior accommodation increased to 253 rooms, from 135 in 2009 (87 percent increase)
- Standard accommodation increased to 494 rooms, from 315 in 2009 (53 percent increase)
- Budget accommodation increased to 418 rooms, from 406 in 2009 (2.9 percent increase)

The increasing level of accommodation supply from 2008 to 2012 is illustrated in the graph below.



The majority of the deluxe and superior room capacities have been built in rural resort locations, whilst much of the budget and standard rooms were built in and around Apia. Capacity has been lost after Cyclone Evan in 2012; much of this capacity is scheduled to be back in operation by 2014. The number of properties pre the Tsunami and pre and post Cyclone Evan is summarized in the table below:

Category	Pre- Tsunami (2009)	Pre-Cyclone Evan (2012)	2013 (July)
Hotel			
Deluxe	5	10	9
Superior Standard	5	11	11
Standard	21	29	30
Budget	27	36	38
Holiday Homes	-	3	2
Sub-Total	58	89	90
Beach Fales			

Beach Overnights	Fale	9	20	25
Beach Visitors	Fale Day	18	10	17
Sub-Total		27	30	42
Total		85	119	132

The table below indicates the status of a number of proposed hotel investments which have received development approval and are in the early stages of development:

Project	Investment Type	Estimated Completion Date
Vavau – Warwick Resort	80 rooms – Deluxe (Stage One)	TBC
Saletonga Sand Beach Resort	30 rooms- Deluxe (Stage One)	Early 2014
Return to Paradise	50 – 55 rooms	Early 2014
Taumeasina Island Resort	25 villas and 75 rooms – First Class	Early 2016
Sheraton Aggie Greys Hotel	200 rooms (First Class)	July 2014
Hotel Millenia	6 – 3 bedroom units (Deluxe)	August 2014
Tiavi Mountain Escape	10 – 12 room (Standard)	Early 2014

A total increase of 390 rooms will become available by the third quarter of 2014, of which 200 rooms represents the re-opening of Aggie Greys Hotel in Apia. The majority of these rooms will be at the First Class and Deluxe level. A further 80 rooms has been approved for Stage One of the Warwick Hotel project, but this has yet to commence.

The re-opening of Aggie Greys Hotel under the Sheraton brand together with the completion of the Taumeasina Island Resort by the Lamana Group will establish a new and higher standard for hotel accommodation in Samoa, which will generate opportunities to grow the current market, develop new markets and increase yield.

Visitor Attractions and Activities

Samoa has a range of visitor attractions which are primarily based on the unique environmental features and/or cultural products. The most popular ten attractions in Samoa are listed in order of visitation below (IVS 2013):

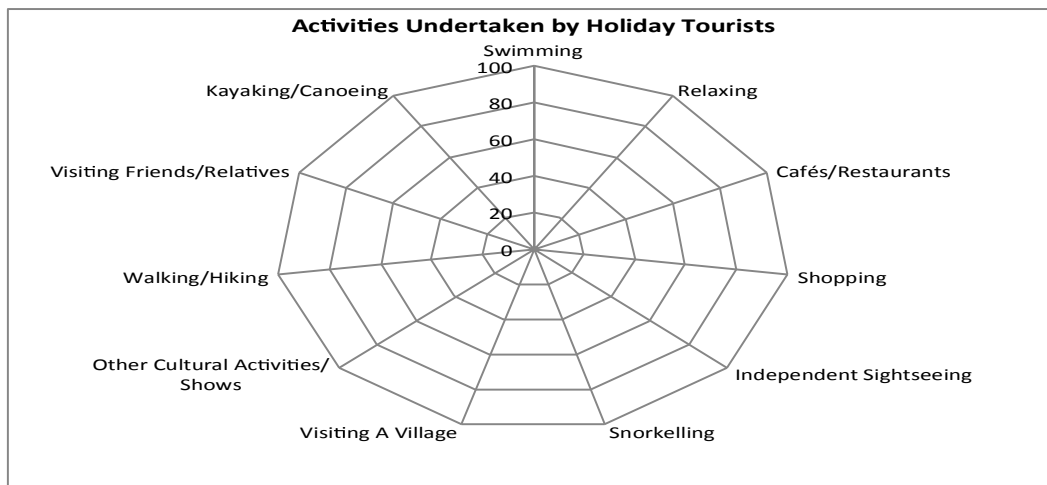
- Lalomanu and Saleapaga Beach
- To Sua Trench
- Piula Cave Pool
- Papase’ea Sliding Rocks
- Robert Louis Stevenson’s Grave
- Saleaula Lava Fields
- Swimming with Turtles Satoalepai
- Robert Lois Stevenson Museum
- Togitogiga Falls

Lalomanu and Saleapaga Beach is the most popular attraction for tourists visiting Samoa. One third (33 percent) of all tourists visit the beach, and nearly one half (48 percent) of all holiday tourists visit. It is most popular amongst visitors from Europe (56 percent visit it).

The next four most popular attractions for all tourists are To Sua Trench, Piula Cave Pool, Papasea Sliding Rocks and Robert Louis Stevenson’s Grave.

Tourists from Europe visit more attractions than those from any other region (they average over 5 attraction visits per tourist), followed by Australia (over 3 attraction visits per tourist). Holiday tourists average almost four attraction visits per tourist, with VFR and Sports tourists averaging almost 2. Business and Other tourists average around one attraction visit per trip. The most popular activities whilst visiting Samoa are going to Cafés/Restaurants, Shopping, Swimming, Relaxing and Visiting Friends/Relatives. Almost 70 percent of all tourists visited a Café/Restaurant.

Swimming and Relaxing are the most popular activities for holiday tourists. Both activities were undertaken by over 80% of holiday tourists. The next three most popular activities are visiting Cafés/Restaurants, Shopping, and Independent Sightseeing. The diagram below indicates the most popular activities undertaken by tourists (IVS 2013).



Overall the level of satisfaction with Samoa as a visitor destination is relatively high, scoring 4.4 out of 5 on the 2013 IVS; similarly the likelihood to return amongst all visitors scores highly 4.3 and holiday visitors 4.1 and the likelihood to recommend was high at 4.7 for holiday visitors.

The highest level of satisfaction was with the beaches, marine environment and marine activities, evening activities, restaurants/cafes and safety; the lowest level of satisfaction was with the ferry, pre-trip visitor information, visitor information provided in Samoa, rubbish collection and signage. Cultural activities only scored mid-range.

Tourism Growth Prospects

Globally outbound tourism is forecast to grow by 4.1 percent per annum until 2020 (UNWTO), although in the short term (next two to three years) long haul travel may grow at a slower rate. UNWTO forecasts that Europe will remain the World’s leading outbound generator through to 2020, accounting for almost half of all tourist arrivals worldwide. In 2012 (January to August) global tourism increased by approximately 4 percent (UNWTO) with the Asia Pacific region growing at a higher rate of 7 percent.

Australia and New Zealand account for almost 63 percent of arrivals to Samoa, with the American Samoa accounting for a further 17 percent. For holiday visitors this rises to 69 percent from Australia and New Zealand and 12 percent from American Samoa, although North America is approximately 8 percent and Europe is just under 7 percent. A brief analysis of growth prospects from these markets is presented below:

The Australian economy continues to grow on the basis of expansion in the mining sector and the Australian Dollar has strengthened significantly against major currencies. The domestic economy is expected to grow annually by 2 to 3 per cent in the short term. Increased seat capacity and competition in the airline sector have also led to a high level of discounting of international airfares. These factors combined will continue to lead to increased outbound holiday travel in the short term. Australian overseas spending increased by approximately 8 percent in 2011 to \$AUD 95 billion. Growth prospects in the medium term from this market are positive, with Tourism Australia forecasting outbound growth of 2.8 percent to 2020.

The economic performance of New Zealand is forecast to remain positive over the next ten years. The real GDP is forecast to increase annually by 2.3 per cent between 2011 and 2020. Outbound tourism is forecast to increase by 1.8 per cent per annum until 2015. In 2012 international departures from New Zealand were up by 5.4 percent, stimulated by increased capacity and frequency to Asia and Australia and a stronger New Zealand dollar. Growth prospects from New Zealand remain positive in the medium term.

Any growth from the secondary long haul markets of USA and Europe appears to be less certain. Europe and the US continue to struggle to recover from the GFC effects. Economic recovery in Europe is predicted to be long term whilst the US economy appears to be slowly recovering.

Asian growth prospects are also mixed and need to be considered on a country by country basis; the Japanese economy shows little sign of improving and has suffered from the double blow of natural disasters and the GFC. China is exhibiting substantial growth in outbound tourism, but there is little evidence of travel patterns extending to the South Pacific, due to lack of awareness, poor travel connections and limited product appeal. The lack of direct flight connections is a particular constraint for this market.

Visitor Targets

Following on from an analysis of market trends and prospects the following visitor targets by destination have been developed for the next five years¹⁶.

Source Market	Estimated 2013 benchmark	2018 target visitors		Annual growth targets		5 year growth	
		Low target	High target	Low target	High target	Low target	High target
American Samoa	21,764	24,029	26,479	2%	4%	10.41%	21.66%
New Zealand	51,125	69,866	76,806	Holiday 4% Others 5%	Holiday 6% Others 7%	36.66%	50.23%
Australia	27,225	37,116	40,738	Holiday 7% Others 6%	Holiday 9% Others 8%	36.33%	49.63%
North America	8,793	9,708	10,698	2%	4%	10.41%	21.66%

¹⁶ Further market analysis is provided in the STA Five Year Marketing Strategy for Samoa 2014 - 2018

Other Pacific Islands	6,786	7,875	8,669	Business & Sport 5% Other 2%	Business & Sport 7% Other 4%	16.05%	27.75%
UK / Europe	3,864	4,266	4,701	2%	4%	10.40%	21.66%
Asia	4,089	6,446	7,057	All except VFR 10% VFR 5%	All except VFR 12% VFR 7%	57.64%	72.58%
Rest of World	1,080	1,378	1,515	5%	7%	27.59%	40.28%
Total	124,726	160,684	176,663	5.21%	7.22%	28.83%	41.64%

Tourism Institutional Context

Government Agencies

A wide mix of public and private sector organisations are involved in the management and development of the sector. The Tourism Sector Committee (TSSC) is the high level body with oversight for sector policy and is chaired by the Hon Prime Minister and Minister for Tourism. The TSSC is a public – private sector collaboration established in 2011; representation on the TSSC consists of:

- Hon Prime Minister (Chair)
- CEO Samoa Tourism Authority
- President Samoa Hotels Association
- President Samoa Savaii Tourism Association
- CEO Ministry of Women, Community and Social Development
- CEO Ministry of Finance
- CEO Ministry of Commerce, Industry and Labour
- New Zealand Aid Programme Representatives
- CEO Ministry of Natural Resources and the Environment

Reflecting the cross-sectoral nature of tourism, a wide mix of public and private sector organisations are actively engaged in the sector.

The STA is the lead agency for policy, planning, destination marketing, visitor information, market research and sector coordination. The STA is a semi- autonomous agency, which is funded by Government, but reports to an independent board and in-turn to the Minister of Tourism. Under the Tourism Development Act 2012, STA core functions include but are not limited to:

- Hosting and participating in any meeting in relation to any purpose provided under the Act.

- Preparing proposals for tourism development incentive schemes and approval of incentives provided that authority has been given to STA.
- Formulating tourism policies and plans and advising the Minister responsible for tourism.
- Consultations with other Ministries for the enforcement of laws relating to tourism.
- Administering of licensing requirements under the Act and the business Licences Act.
- Ensuring appropriate standards and systems ratings are formulated and applied.
- Maintaining records, statistics and accounts in relation to its functions under the Act including verification and making recommendations for the effectiveness and enhancement of same.
- Implementing marketing strategies and promotional activities and monitoring the effectiveness and making recommendations for improved efficiency.
- Undertaking tourism research.
- Disseminating information relevant to tourism in Samoa.

STA has marketing representatives in New Zealand, Australia, USA and the United Kingdom. Although its budget has nearly trebled over the last few years, STA's capacity is still spread thinly across its functional areas due to the agency's broad mandate. The trend in the past has been for STA to have an expanded functionality to seek to address a wide range of tourism related issues. In addition to the above mentioned functions, the agency currently has responsibilities for major events such as the Teuila Festival, beautification programs, community awareness, tourism and climate change and the Tourism Cyclone Recovery Program (TCRP).

A number of agencies are involved in product development. These include the STA, the Small Business Enterprise Centre (SBEC), Samoa Hotel Association and other industry groups. The SBEC facilitates business advice, access to finance and training across all sectors. Tourism businesses make up a relatively small share of SBEC's portfolio.

A large number of Government agencies impact upon the delivery of the Samoan tourism product and the investment climate including:

- Electric Power Corporation (EPC): responsible for the provision of electricity and power
- Ministry of Commerce, Industry and Labour (MCIL): responsible for company registration and compliance, foreign, investment promotion and administering of private sector funding schemes.
- Ministry of Health (MoH) and National Health Services (NHS): responsible for the provision of health care as well as compliance with health and safety standards for the food beverage businesses.
- Ministry of Natural Resources and Environment (MNRE): responsible for disaster management, meteorology and climate change and PUMA (development consents)
- Ministry of Police and Prisons (MoPP): responsible for safety and security.
- Ministry of the Prime Minister and Cabinet (MPMC): responsible for immigration.
- Ministry of Finance (MoF): fiscal policy, coordination of sector planning, aid management and budget allocations.
- Ministry for Revenue (MfR): responsible for business licences, Government Taxes, customs and imports.
- Ministry of Women Community and Social Development (MWCSO): responsible for development of communities.
- Ministry of Works Transport and Infrastructure (MWTI): responsible for land transport, infrastructure and civil aviation
- Samoa Ports Authority (SPA): responsible for all ports and the marina
- Samoa Water Authority (SWA): responsible for the provision of water and waste water services
- Samoa Shipping Corporation (SSC): responsible for the operation and provision of inter-island ferry travel.

Private Sector Associations

The Samoa Hotel Association (SHA) is the lead industry body. Its primary functions are to (i) advocate for its members and the wider industry on government policy, regulations, standards, development proposals, legislation and sector issues, (ii) identify workplace training needs (iii) undertake special projects from time to time such as the Tourism Tsunami Recovery Programme, (TTRP).

The Samoa Savaii Tourism Association (SSTA) was established in late 2010. The Association has started to provide a single voice for the Savaii tourism industry. The Association aims to facilitate workplace training for its members and influence improvements to visitor information, customer service, and access to Savaii. It will act as an advocate for sustainable development on Savaii. The Association has yet to prepare a Strategic Plan.

Industry regulation and investment is managed through MCIL. It also plays a key role in managing the Private Sector Support Fund (PSSF), a multi-sector financing tool aimed at strengthening individual business and assisting with tourism product development.

Other industry groups and informal collectives include the Samoa Car Rental Association, Taxi Buses and Transport Association, Samoa Travel Agency Association, Samoa Tour Guides Association and the Bar and Restaurants Association, as well as Beach Fale Associations. A wide network of other stakeholders are also engaged directly and indirectly in the supply side of the sector such as Women in Business (WIBDI) farmers, vegetable and fruit growers.

Matters pertaining to the sustainable management of the destination – water quality, climate change, site development, land management and resource protection – come under the Ministry of Natural Resources and Environment (MNRE). The STA and industry bodies also play an important advocacy role in this area.

Development of the tourism workforce is spread across a number of key players. Two institutions provide formal tertiary training and education in tourism. The Institute of Technology (National University of Samoa, NUS) provides a one-year Certificate in Tourism and Hospitality and a two-year Diploma in Tourism. Established in Samoa in 2008, the Australian Pacific Technical College (APTC) provides Level 3 (Australian Qualifications Framework) certificate courses in three occupational fields of tourism hospitality and professional cookery. APTC attracts students from within Samoa and across the Pacific. APTC will have a presence in Samoa until at least 2015. Without APTC, the NUS would become the main provider of formal tourism training and education in Samoa. Currently, the two institutions complement each other by providing a staircase from secondary school through to higher qualifications. APTC's service agreement with the Samoan government is based on it providing added value or higher - grade qualifications, so that it does not compete with courses provided by NUS; APTC provides an Australian accredited qualification.

The Samoa Qualifications Authority (SQA) manages the Samoa Qualifications Framework (SQF) under which tourism vocational education and training is accredited. Currently, the NUS tourism courses are not yet accredited.

In terms of workplace training, the Samoan Chamber of Commerce (SCoC) carries out annual training needs analyses and coordinates requests for private sector training. These are channelled through to the Oloamanu Professional Development Centre that coordinates and manages the delivery of all training under the In Country Training Programme (ICT), jointly funded by the New Zealand Aid Programme and AusAID. Virtually all businesses provide a mixture of structured and un-structured on the job training for employees. In 2010 – 2011, the APTC delivered Level 3 training in the workplace on Savaii and Upolu.

A Tourism Training Taskforce (TTT) made up of the key sector groups was established in 2010 to oversee implementation of the Samoa Tourism Workforce Development Plan (2010 – 2012).

4. Strategic Direction, Goals and Objectives

This Section outlines the strategic vision for the sector, together with the goals, outcomes and indicators under the Plan.

Tourism Sector Vision

The Vision for the Tourism Sector in Samoa under the STSP is that:

‘By 2019 Samoa will have a growing tourism sector, which engages our visitors and people and is recognized as the leading Pacific destination for sustainable tourism’.

The Vision was developed through an extensive stakeholder consultation process.

Key Development Principles

The principles of sustainable tourism are integral to the Vision for the tourism sector. The UNWTO defines sustainable tourism simply as *‘Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities’*¹⁷.

Sustainable tourism development guidelines and management practices are applicable to all forms of tourism including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

The principles of Sustainable Tourism are therefore that it should;

- Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary.

Sustainable tourism should also maintain a high level of tourist satisfaction and ensure a meaningful experience to the tourists, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

These principles are reflected through the Vision for the tourism sector in Samoa and embodied in this Plan.

¹⁷ Making Tourism More Sustainable - A Guide for Policy Makers, UNEP and UNWTO, 2005

Strategic Policy Outcomes and Goals

Five interrelated Programme Areas form the basis for the STSP. High level outcomes have been established for each Programme and the STSP recommendations have been framed around these Areas as follows:

PROGRAMME AREA	Marketing the Destination	HRD and Training	Product Development	Investment and Business Enabling Environment	Transport Infrastructure and Access
OUTCOME	Growing demand and yield for tourism products	Improved workforce skills and service delivery	Higher quality tourism products and experiences	Increased tourism investment and profitability	Improved access and destination competitiveness
HIGH LEVEL GOALS	Coordinate and execute effective destination marketing	Provide education and training which supports industry and community needs	Support product improvement and product development to meet market expectations	Facilitate viable investment and business sustainability	Improve access, infrastructure use and maintenance

The key issues relating to each Programme Area, together with the key recommendations for each, are highlighted in Section Five of this Plan. A summary of the Goals, Outcomes and Outputs for each focal area is also provided in the Logframe provided in Annex B.

Tourism Sector Indicators

In order to determine whether the tourism sector is achieving the Strategic Policy Outcomes and Goals identified above, a number of indicators have been established. These indicators can be readily measured and provide the basis for high level sector monitoring and evaluation of the implementation of the STSP. The indicators for the STSP have been identified across five interrelated areas of sustainable tourism:

- Tourism Expenditure and Employment
- Market Size and Composition
- Visitor Satisfaction
- Community Engagement
- Environmental Sustainability

The specific high level indicators for the tourism sector under the STSP are that by 2019 tourism in Samoa will achieve the following:

Tourism Expenditure and Employment

- Be the main source of income for Samoans generating over \$SAT550 million for the national economy annually (equating to approx. 6 percent growth pa)
- Increase the number of those employed full time in the workforce through tourism by an additional 1,700 jobs to approximately 6,700 (equating to approx. 6 percent growth pa)
- Increase the average daily expenditure per visitor from \$SAT296 (2012/13) to \$SAT335 in 2019 (equating to 2.5 percent growth pa)

Market Size and Composition

- Increase the total number of arrivals to 162,000 per annum (126,700 estimated for 2013) (equating to 5 percent growth pa)
- Increase the holiday market by 7 percent per annum over the next five years; assuming market estimated size of 46,500 for 2013, this equates to approximately 65,000 holiday visitors in 2019
- Extend the average length of stay for all visitors to 11 days (2012 was 10.4 days)
- Increase the number of cruise ship visits to 20 in 2019 (equating to one additional visit per annum) and maintain accurate records of all cruise ship passengers numbers
- Reduce the seasonal impacts of tourism so that approximately 46 percent of all visitor arrivals take place in the first six months of the year)(2011 – was 44 percent)

Visitor Satisfaction

- Increase visitor rating level to ‘very satisfied’ with pre-trip information and visitor information in Samoa from the current rating of ‘dissatisfied’
- Increase the level of visitor satisfaction for cultural activities from neither satisfied nor dissatisfied, (3.5 out of 5) to ‘satisfied (5 out of 5).

Community Engagement

- Increase community management and participation in commercial enterprises based on upgrading of twenty natural and cultural attractions.
- Increase the consumption of local primary produce by tourism related businesses by \$SAT4 million per annum
- Increase community engagement and understanding of the opportunities tourism affords through implementation of ongoing Tourism Awareness Program with ten community awareness workshops per annum.

Environmental Sustainability

- Increase visitation and improved site management at twenty key natural and cultural attraction sites
- Introduce and monitor additional tourism sustainable indicators in line with GSTC Destination Criteria

5. Sector Constraints, Key Strategies and Priority Actions

Introduction

A number of key constraints which impede the tourism sector have been identified through the consultation and analysis conducted as part of the STSP planning process.

Five interrelated Programme Areas form the basis of the STSP strategic analysis and prioritized implementation framework as follows:



This section of the STSP highlights the key issues, constraints and key strategic actions which are required to overcome the identified sector constraints and achieve the STSP objectives and goals.

Limited human resource and financial constraints determine that a prioritised and sequenced approach is required to the implementation of the actions identified. This is further documented in Sections Six, Seven and Eight of this Plan.

MARKETING AND RESEARCH

Overarching Strategy

To grow demand and yield for the destination and its tourism products

Effective destination marketing is a key component of tourism sector development as it creates demand for tourism products and supports business sustainability and investment, which in turn leads to growth of the sector. In order to compete in the international market place it is critical that tourism marketing is well resourced, efficiently managed and effectively delivered.

Consultation with the Samoa Hotels Association (SHA)¹⁸ and other stakeholders has identified a number of issues which need to be further addressed to improve the destination marketing of Samoa including:

¹⁸ Samoa Hotels Association Industry Issues Paper 2013

- Maintaining the position in core markets of Australia and New Zealand, whilst focussing on aggressive development of emerging markets;
- The need to improve coordination, information dissemination and engagement between STA, industry members and other stakeholders;
- The need to ensure consistency of the current brand ‘*Samoa, Treasured Islands of the South Pacific*’;
- A desire for further development of cooperative marketing opportunities for industry as part of destinational promotions in key markets;
- Encourage more organised product representation at trade road shows with STA;
- Increase product presence on all internet portals to assist with awareness and drive tariffs.

In order to address these concerns and to provide a strategic platform for future marketing activities, STA, with the assistance of the NZ Government, has, in partnership with the industry, developed a Five Year Marketing Strategy for Samoa and a rolling Annual Marketing Plan.

The Five Year Marketing Strategy draws extensively on market research among consumers and the travel trade in key source markets and the Strategy provides the basis for the marketing of Samoa during the period of the STSP; some of the key findings from the research include and the key findings indicate that several market factors are supportive of growth including:

- *Awareness of Samoa as a holiday destination is increasing.* Market research among the travel trade and consumers in Australia and New Zealand indicates that there is a greater awareness of Samoa in key source markets.
- *Consumers are looking to new and emerging destinations such as Samoa.* Changing travel patterns are seeing a shift away from traditional destinations as global travel continues to grow.
- *There is strong interest and growth in adventure and experiential travel.* Continued growth in this sector and Samoa’s natural attractions place Samoa in a position to capture this market.
- *Positive regional outlook.* The economies of major short-haul source markets, Australia and New Zealand continue to perform well in comparison to other regions of the world, with continued outbound tourism growth from both markets.

The dynamics of travel continue to change with the expanding reach of technology into many facets of the travel experience. The challenge for Samoa is to deliver a clear and unique message to the market through strategically appropriate and effective technology tools.

Across all research conducted there are common themes that clearly identify where Samoa’s strengths and weaknesses lie. The research also clearly indicates where there are opportunities for more focused marketing. From a marketing perspective Samoa’s:

- *Strengths* lie in cultural and natural attributes, including friendly people and clear waters, beautiful beaches and an unspoilt natural environment.
- *Weaknesses* include the need to improve quality of tourism services and facilities and ensure measures are in place to provide a range of desirable activities.
- *Opportunities* exist to build awareness through more digital penetration and differentiate Samoa from other island holiday destinations leveraging off a unique culture and natural environment.
- *Threats* exist from increased competition and any failure to respond to changing consumer demands.

The Five Year Marketing Strategy includes a situation analysis and review of recent market research which reveals awareness of Samoa as a holiday destination is increasing and consumers are looking for emerging tourism destinations, such as Samoa, as holiday options. Challenges such as flight access and matching product with demand remain, however research also shows high overall satisfaction (4.4 out of 5) with Samoa and a similar number of visitors also saying they would recommend Samoa as a holiday destination.

Tourism trends indicate people are taking shorter trips, spending more on their travel, looking for individual holiday experiences and that adventure tourism is on the rise. Technology will continue to exert influence over marketing, distribution and purchasing behavior. Further to this bloggers and social media are gaining momentum.

Samoa's current destination branding with the tagline '*Treasured Islands of the South Pacific*' is built around highlighting Samoa's uniqueness as a visitor destination, which is underpinned by Fa'a Samoa as well as proving a meaningful locator. The key to building the brand over the next five years will be to ensure the strong attributes for Samoa are identified in marketing efforts. Key attributes identified for Samoa include:

- A unique Polynesian culture with a strong sense of place
- A lush, tropical and unspoilt environment
- Beautiful beaches and crystal clear waters
- Friendly people and relaxing

The Five Year Marketing Strategy identifies that the Samoa brand needs to be globally recognised and yet allow for specific elements to be activated in key source markets. To achieve this, three focus points are to be activated.

- Highlighting why Samoa is different
- Tailoring the brand to specific markets
- Enhancement of brand messaging and communication

In line with the goals of the STSP the following goals are also established within the Five Year Marketing Strategy.

- Increase overall visitor arrivals with growth rate of at least 5 percent per annum
- Increase length of visitors stay by one more day
- Encourage visitors to discover Samoa and increase their daily spend
- Increase experiential travel with more beach fale stays
- Increase cruise ship visits by 1 per annum to a total of 20 per annum by 2019

Strategies to achieve these goals include a comprehensive set of key performance indicators to monitor progress, tailoring campaigns around key goals, implementation of marketing tools to improve the visitor holiday experience, segment targeted online marketing and building global networks to grow and develop new market segments.

In supporting the goals and strategic areas of focus, this will include building awareness, differentiating Samoa from other destinations, increasing product distribution and improved air access. Aligning and communicating all marketing themes with product and distribution networks is also highlighted as a priority.

With direct access and established market representation, the major source markets of New Zealand (43 percent) and Australia (20 percent) will continue to be the main focus of marketing efforts along with a revitalized strategic approach to the third major market of American Samoa (18 percent) being implemented. The secondary markets of North America, UK/Europe and emerging countries in Asia will see enhanced marketing to reinvigorate and develop growth. Planned development of new properties and introduction of global hotel brands over the coming years should assist in generating new demand, together with proposals to develop air access and demand.

Priority activities to support the plan include exploring opportunities to develop events and MICE markets, developing destination promotional tools and a domestic marketing program primarily focused at traditional low season tourist periods. A continuation and expansion of recently successful market research projects is also incorporated into the Marketing Strategy.

The table below summarises current main segments and identified opportunity segments in each source market identified in the Marketing Strategy.

Source market	Mainstream segments	Opportunity Segments
New Zealand	Couples Honeymooners Families	Family & group travel Chill out crowd (fales) Soft adventure
Australia	Couples Honeymooners Families	Family & group travel Discover Samoa (touring) Barefoot luxury
American Samoa	Families	Hop-on-over (short breaks) Transit visitors
North America		Soft adventure Barefoot luxury
UK/Europe		Young adventurers Barefoot luxury
Asia		Fiji Plus One (dual destination) Unique experiences

Online marketing will remain a major focus over the next 5 years, with technology playing a major role in tourism development and marketing. The Samoa.Travel website will see enhancements to improve the overall consumer experience. This includes upgrading to Samoa.Direct into a more dynamic and robust online booking tool offering a wider range of services. STA’s corporate website will also undergo enhancements to provide Samoa tourism stakeholders and overseas trade with access to a wider range of online marketing and information tools.

Feedback from the IVS indicates that the provision of information on Samoa as a destination needs to be improved; this includes the information provided from the Visitor Information Centre and the information provided through the internet. A thorough review of information needs is required to improve on line content and training and attachments in Information Services to build capacity of STA staff.

A number of key marketing development projects and resource and capacity building requirements have been identified to assist with the implementation of the 2014-2018 Samoa Tourism Marketing Strategy.

Whilst the trade continue to play an important role, many of Samoa’s regional Asia-Pacific competitors are using an increasing variety of distribution and marketing options to increase destination awareness, particularly online marketing tools and campaigns.

A summary of high level marketing budgets are outlined in the table below.

Source Market	2013/4 marketing budget (\$SAT)	Average marketing spend per holiday visitor 2009 – 2013 (\$SAT)	Average marketing spend per visitor 2009 - 2013 (\$SAT)	2018 Estimated Budget (\$SAT)	Average Spend per annum per holiday visitor 2014 -2018 (\$SAT)	Average Spend per visitor 2014 -2018 (\$SAT)
American Samoa	126,000	15.87	3.85	130,000	23.43	5.47
New Zealand	1,850,000	61.38	25.41	2,600,000	83.32	34.56
Australia	2,410,000	209.04	82.92	3,225,000	214.98	85.19
North America	380,000	148.82	53.98	440,000	115.54	43.15
OPI						
UK Europe	850,000	167.59	123.50	940,000	292.45	213.49
Asia	326,000	141.28	35.57	460,000	312.62	72.51
Samoa & Rest of World	350,000	n/a	n/a	500,000	n/a	n/a
Total	6,292,000¹⁹			8,295,000		

Included in the Five Year Marketing Strategy are proposed projects that will require expenditure beyond the annual marketing high level budgets. Projects are proposed to be completed during next 5 year period and these are summarized below.

Project	Reference	Budget (\$SAT)	Timeline	Notes
Widen image library	4.3	100,000	2014 - 2015	Build library over time
Refresh destination TVCs and other video footage	4.3	200,000	2014	Priority to update
Discover Samoa Card	6.2.3	50,000	2014	Ongoing costs to be incorporated under Samoa marketing budgets
Software apps	6.2.3/7.2.4	100,000	2014 -2015 Full ops 2015	Initially 1 SoMoLo app
Market Research	6.3.2	250,000	2014 - 2018	Allowance for 3 Asia trade and 1 consumer 1 North America trade & 1 Europe trade 1 Aus trade and 1 consumer 1 NZ trade and 1 consumer & 1 IVS
Samoa Direct Online and e-marketing hub and channel management	7.1.1	150,000	2014 – 2015 Full ops 2015	Propose operation commercial self-funding within 2 years of establishment Ongoing costs under Samoa budget
Foreign language website translation and hosting	7.2.2	150,000	2014 – 2017 4 sites by 2018	Ongoing costs to be incorporated under Asia marketing budgets
TOTAL COSTS		1,000,000		

In addition to developing the Five Year Marketing Strategy and Annual Marketing Plan, STA has been increasing its focus on market research and intelligence to support both the marketing and planning functions,

¹⁹ Figures taken from estimates provided in the Samoa Five Year Tourism Marketing Strategy

as well as improve the monitoring and evaluation of sector performance and further the understanding of visitor needs and satisfaction levels.

In addition to the on-going collation and analysis of visitor arrival and departure statistics collected from the Visitor Arrival and Departure cards, a range of research activities have been initiated by the STA Division of Research and the Division of Marketing to improve the sector database including:

- Conducting an International Visitor Exit Survey (every two years)
- Trade research in major markets (Australia and New Zealand)
- Cruise Passenger Survey (every two years) and develop a strategy that will promote and aid the achievement of the target of 30 cruise ships on an annual basis as in SDS.
- Tourism Accommodation and Business Survey
- Consumer research in major source markets (Australia and New Zealand)

These research activities provide vital information for sector marketing, planning and management and will be integrated into the ongoing Annual Research Program conducted by STA and supported by the National Statistics Office.

MARKETING AND RESEARCH – KEY ACTIONS

HIGH PRIORITY ACTIONS

1. **Resource and implement the Samoa Five Year Marketing Strategy through an STA Annual Marketing Plan including:**
 - a. **Building and further developing the current brand to differentiate Samoa in key source markets**
 - b. **Tailoring of destination campaigns around key goals**
 - c. **Implementation of marketing tools to improve visitor experience**
 - d. **Targeted and segmented digital and social media marketing activities**
 - e. **Building global networks to grow developing markets**
 - f. **Increase product distribution through traditional and online channels**
 - g. **Provide marketing support to improve air access**
 - h. **Further development of the MICE and special events markets**
 - i. **Implementing and monitoring the high level budgets established in the Marketing Strategy**
 - j. **Implementation of market development projects as outlined in the Marketing Strategy including:**
 - i. **Image library content**
 - ii. **Refreshing TVCs and other video footage**
 - iii. **Development and roll out of Discover Samoa Card**
 - iv. **Development of Software Apps**
 - v. **Further development of Samoa Direct Online e-marketing hub and channel management**
 - vi. **Foreign website translation and hosting**
 - k. **Facilitate improvements to Visitor Information Services in Samoa and the content of the STA destination website**
2. **Implement an ongoing research and intelligence program including:**
 - a. **A rolling program of trade and consumer research in key source markets**
 - b. **Biennial IVS and Economic Impact Study**
 - c. **Biennial Cruise Ship Survey**
 - d. **Biennial Business Survey**
 - e. **Annual Accommodation Occupancy Survey**

3. Continue the compilation of statistics based on the visitor arrival and departure statistics and provide quarterly updates to industry and stakeholders. Recruiting a TA to help develop a cruise shipping strategy for the destination would be beneficial in achieving target goals for this segment of the industry.
4. Monitor the effectiveness of the major annual activities and marketing program through the KPIs developed in the Five Year Marketing Strategy
5. Hold Annual Industry Marketing Forum to present and discuss Annual Marketing Plan and Marketing Strategy outcomes and review Annual Planning accordingly

INVESTMENT AND BUSINESS ENABLING ENVIRONMENT

Overarching Strategy

To provide an enabling environment to support growth and investment in tourism related business

Business Enabling Environment

The cost of key business inputs is high in Samoa and this impedes profitability and acts as a disincentive to invest. Linkages to basic local inputs such as primary produce are weak and this leads to a high level of leakage due to import requirements. Whilst this is not unusual in small island economies, efforts need to be made to encourage greater consistency and quality in the supply of local goods and services, particularly fresh produce such as meat, fish and vegetables, as well as reduce the cost of key business inputs relating to energy and transport.

Improvements to the business enabling environment will be important to the future growth of tourism in Samoa, as existing business, re-investment and new investment can ultimately only be self-sustaining if profitable business opportunities can be realised by the private sector. Changes to the enabling environment in Samoa can also have a positive impact on the fiscal position of the country, as well as broader economic benefits.

The internet is increasingly becoming a key component of the business enabling environment, particularly for tourism as it links Samoa as a destination and the Samoan tourism products to consumers, as well as provide the most cost effective and convenient method for product distribution and booking. Improvements to the speed and reliability of internet services would have major benefits for tourism operators in Samoa.

The Government, through the Manufacturing, Trade and Commerce (MTC) Sector Plan 2012 – 2016 has identified a number of areas where the business enabling environment generally could be improved. These are also largely in line with several of the recommendations contained within the IFC Tourism Sector Diagnostic Study²⁰ (2010). The MTC Sector Plan indicates that the Government will seek to improve the enabling environment by:

- Undertaking a review of the Companies Act 2006 to incorporate a payment structure; and
- Setting up an online business registration and approval system

Samoa is reasonably well endowed with grant and lending institutions and a Small Business Enterprise Centre (SBEC) that provides practical business advice, training and access to the Small Business Loan Guarantee Scheme. Commercial banks have funds to lend but struggle to find robust business proposals, whilst operators highlight the relatively high commercial interest rates. The big constraints facing small businesses highlighted through the consultations, are high interest rates, low capacity to repay borrowings, lack of equity or security

²⁰ Tourism Impediments Diagnostic - State of Play Assessment Report (Draft) – IFC May 2010

to borrow against and lack of working capital (cash). The Commercial Banks and the Development Bank have tourism portfolios with some underperforming loans. A summary of existing finance schemes is provided in Annex B.

Business Inputs and Economic Linkages

The SHA Issues Paper highlights the higher level of interest rates being levied by the commercial banks as a significant impediment to business sustainability and expansion. The financial impact of the 2009 Tsunami and Cyclone Evan in 2012 has been significant for many operators. Both events increased borrowing requirements and reduced short term demand from major markets, increasing overheads and reducing profitability for many operators. The Tourism Cyclone Recovery Program (TCRP) has been designed to support affected operators through a build back better scheme.

Utility charges are a major burden for tourism operators. The cost of electricity has increased substantially in recent years²¹ and high electricity costs impose a significant burden on the profitability of the sector. Currently a surcharge of 25.1 percent is applied to electricity prices which further erodes industry profitability and viability.

The newly introduced wastewater treatment surcharge fee is another impediment as it has increased water costs substantially for industry operators. The fee structure needs to be reviewed to make it more equitable across users rather than penalise tourism operators.

A study by the International Trade Centre (2011) on Tourism and Poverty Reduction in Samoa indicates that substantial opportunities exist to increase the supply and use of local vegetables and fish for use by the tourism sector. The further development of linkages between tourism and primary production would support reductions in imports, but would also have potential to reduce the cost of inputs for the sector and support needs to continue in this regard. The Government also needs to work with regional agencies such as IFC who are currently undertaking work in the region to support the development of linkages between agriculture and tourism.

Investment

Both international and domestic investment in new and existing tourism products will be essential if tourism is to grow in Samoa. Currently the investment climate in Samoa is less favourable than in many other competing destinations due to the combination of factors outlined in this STSP. In order to create a more attractive investment climate a holistic approach needs to be taken to the development of tourism and the implementation of the STSP. Specifically, a number of actions directly relating to the investment process can be implemented and these are outlined in this section.

The MTC Sector Plan identifies a number of areas to improve the investment process in Samoa including the need to:

- Accelerate and finalise the review of the Foreign Investment Act and prepare an institutional plan to ensure effective administration of the restricted activities list for foreign investors.
- Establish a country credit risk rating through internationally recognized ratings agencies to facilitate commercial risk assessment by international investors
- Enact and implement the Personal Property Security Act which aims to increase economic activity by providing easier access to credit.

²¹ Prices were \$SAT .60/kwh in 2005 and had risen to \$SAT1.10+/kwh as at December 2012 – Source: CPI Statistics, Bureau of Statistics 2013

- Develop e-commerce regulations
- Develop and implement a Competition Law and policy
- Review Fair Trading Act and develop regulations
- Finalise the Labour Law Review including:
 - Labour Employment Relations Bill 2011
 - Labour Employment Regulations
 - Occupational Safety and Health Act 2002
 - OSH Amendment Act 2011
 - OSH regulations 2011
 - Shops Ordinance 1961

The IFC Tourism Sector Diagnostic (May 2010) also highlights a number of impediments including a number of institutional and regulatory barriers to generating tourism investment. These include:

- The lack of a documented investment policy to guide investors and no specific tourism investment promotion strategy. There is a need to formalise and document tourism investment incentives, to more clearly articulate investment policy and to provide better information to potential investors, including supply demand and investment data.
- The need to improve the effectiveness of investment advice and assistance for investors; investors still have to deal with multiple agencies and delays are often incurred to lack of clarity regarding agency roles and the investment process/requirements; STA has been taking a lead role in supporting major investment proposals but has needs strengthening in this regard;
- A lack of information on available investment opportunities; no investment profiles, no packaging.

In addition there is a need for Government to conduct rigorous due diligence on proposed investors prior to embarking on providing substantial support.

The MTC Sector Plan also indicates that the Government will promote remittances as a potential source of investment and undertake an analysis of potential policy schemes, building on the experience of other countries for the source of remittances as a source of community investment.

To encourage investment in tourism facilities and infrastructure, the Government of Samoa in 2003 introduced the Tourism and Hotel Development Incentives Act, which offered investment tax credits for a limited period of 5 years, income tax holidays depending on the level of capital investment and import duty draw-backs.

This legislation was subsequently amended in 2007 to broaden the coverage to include approved development projects which were provided with import duty draw-backs. The incentives available under the current Act can be summarised as follows:

- Tourism project must be approved by the Minister of Finance as a "qualifying Tourism Development Project" and "qualifying Investment".
- Minimum investment of \$SAT 100,000 to be held for a period of five years. The investor will be eligible for a tax credit of 100 percent of the amount of the investment. The year in which the tax credits can apply are determined by the Ministry of Revenue. The investment tax credits expire in 2018.
- The project may have an income tax holiday of 5-15 years dependent on the level of investment as follows:
 - Category One Hotel - where the capital investment in the hotel is over \$SAT1 million and up to and including \$3 million - five years income tax holiday.

- Category Two Hotel - where the capital investment in the hotel is over \$SAT3 million and up to and including \$20 million - ten years income tax holiday.
- Category Three Hotel - where the capital investment in the hotel is over \$SAT30 million - 15 years income tax holiday.
- Exemption from import duty for approved goods imported for the project
- Value Added Goods and Services Tax Refund during the construction period of the approved qualifying project

The IFC Diagnostic Report indicates that the incentives need to be formalised rather than discretionary (upon approval of the Minister of Finance). In addition there is a need to ensure that the range of incentives is competitive with other Pacific destinations which are competing for inward investment. The incentives on offer should be at least comparable with competing destinations and targeted at the identified investment opportunities.

In summary a range of tourism investment incentives should be provided for accommodation developments under ‘major new investments’ and ‘small and medium sized investments’, as well as additional incentives aimed at development of key products in marine tourism, aviation and second homes; further provisions are made to encourage additional joint ventures to facilitate local Samoan equity partnerships. These are summarised below:

Investment Category – Major	Minimum investment requirement SAT 5 m (excluding land cost)
Tax Free Period	A ten year tax holiday for capital investment of not less than SAT 5 mn
Import Duty Exemption	Import duty exemption on all capital goods which are not available locally
Trading Loss Tax Offset	Carry forward losses for up to 8 years in succession
Accelerated Depreciation Allowance	Twenty percent depreciation (not including land) can be written off within any 5 of 8 years
Electricity generation	Hotel electricity plant will be allowed to generate its own electricity and sell the excess to the electricity grid
Investment Category – Small to Medium	Minimum investment requirement SAT 250,000 (excluding land cost)
Investment Tax Allowance	An investment allowance of 55 percent of total capital expenditure can be offset against income from the tourism business, provided that there is no shift of tax revenue offshore
	Allowance is applicable to renovations, refurbishments or extensions of existing accommodation businesses
	Allowance can only be written off against the income from the tourism business
Trading Loss Tax Offset	Carry forward losses for up to 8 years in succession
Import Duty Concessions	5 percent concessionary fiscal duty + GST on building materials, furnishing and fitting, equipment including front office equipment, room amenities, kitchen and dining room equipment and utensils which are not manufactured in Samoa
	5 percent concessionary fiscal duty + GST on specialised water sports equipment (e.g. water jet-ski, water bike) and other similar goods which are not manufactured in Samoa
	5 percent concessionary fiscal duty + GST on heavy plant and machinery for resort project development work provided such plant and machinery is re-exported after

	completion of the project
Accelerated Depreciation Allowance	Twenty percent depreciation (not including land) can be written off within any 5 of 8 years
Electricity generation	The business will be allowed to generate its own electricity and sell the excess to the electricity grid
Marine Tourism Incentive	Marine Vessel – Minimum Cost SAT 500 thousand
	Tourist vessel investment allowance of 55 percent of capital expenditure in relation to vessel purchase cost can be offset against future income from the business.
	If allowance unutilised after 3 years, it may be set off against income of other marine vessels or income from other tourist activities carried on by the vessel owner
Aviation Incentive	Minimum Investment requirement SAT 2 million
Import Duty and GST Exemption	100 percent duty exemption on aviation fuel
	Aircraft investment allowance of 55 percent of capital expenditure in relation to purchase cost can be offset against future income from the business.
Tourism Joint Venture Incentive	Minimum investment requirement SAT 5mn (excluding land cost)
	Further 7 years of income tax exemption for hotel developers who have local Samoan equity partnership of 25 percent minimum
Second Home Program	Minimum investment SAT 500,000 (excluding land cost)
Programme for citizens of other countries	
Investment Allowance	An investment allowance of 55 percent of total capital expenditure can be offset against income from the income from short term holiday rentals (less than 2 months duration), provided that there is no shift of tax revenue offshore)
Interest Income Exemption	Exemption from tax on interest income if a minimum balance of SAT 200,000 is maintained throughout the entire stay in Samoa

Land

The IFC Diagnostic also highlights a number of tourism development impediments including the inadequate access to suitable land for tourism development. The Diagnostic highlights the lengthy process for securing land, the difficulty in using land as security for a mortgage and the requirement to get political endorsement to transfer land titles. Access to potential development sites can also be an issue and several resort proposals have stalled as they have been unable to negotiate suitable access from surrounding land owners.

In addition the IFC Diagnostic identifies the requirement to increasing access to land for investment purpose as a critically important prerequisite for growth and expansion. The Diagnostic indicates that there is a need to further mobilise support to accelerate the pace of legal and policy reforms; this was further highlighted through the stakeholder consultations undertaken as input to this Plan.

Consultations also indicate that the legal process relating to land disputes can be time consuming and costly for participants; long delays can occur in resolving land issues and the court system is reported to be to be overloaded; a system of mediation should be considered. In response to these identified constraints on land access, the government implemented with support from the Asian Development Bank (ADB) a project to promote the economic use of customary land since 2005. This is now in its Third Phase of implementation. The main goal is the development and implementation of a leasing framework that is intended to promote access under transparent and acceptable practices protected by law and policy that will ensure custodial rights of customary land owners are protected, but the focus will be on the ability to mortgage the lease interest on

such land. The creation of a registry of land available for lease will also be important in facilitating investment and is being considered under this project.

INVESTMENT AND BUSINESS ENABLING ENVIRONMENT – KEY ACTIONS

HIGH PRIORITY ACTIONS

1. Improve internet coverage and speeds for tourism operators through implementation of the IT Sector Plan

MEDIUM PRIORITY ACTIONS

2. Improve the enabling environment by implementing the identified recommendations from the MTC Sector Plan including:
 - a. Undertaking a Review of the Companies Act
 - b. Development of an on-line business registration system
 3. Improve the general investment climate by implementing the MTC Sector Plan investment related recommendations including:
 - c. Finalisation of the review of the Foreign Investment Act and preparation of an institutional plan to ensure the effective administration of the restricted activities list for foreign investors.
 - d. Establishment of a country credit risk rating through internationally recognized ratings agencies
 - e. Enact and implement the Personal Property Security Act
 - f. Develop E commerce regulations
 - g. Implement a Competition Law and policy
 - h. Review Fair Trading Act and develop regulations
 - i. Finalise the Labour Law Review
 4. Review utility charges for tourism operators including the wastewater treatment surcharge fee and electricity charges for accommodation providers.
 5. Develop and implement a Tourism Investment Strategy including:
 - a. A targeted tourism investment scheme based on the Investment Incentives set out in the STSP.
 - b. Profiles of identified major tourism investment opportunities and market to pre-screened investors
 - c. Documented process for screening the authenticity of potential investors
 - d. Structure function and budget for a Tourism Investment Unit within STA to facilitate investment in major projects
 - e. A Register of land available for lease for tourism development.
 6. Finalise the amendments to land statutes resulting from the review of land law which is with the Attorney General's Office.
 7. Establish a system of arbitration for land disputes to facilitate early settlement.
 8. Increase linkages between primary producers, handicrafts and tourism providers through business support and facilitation by lead agencies including WIBDI and STA.
-

PRODUCT DEVELOPMENT

Overarching Strategy

To support product improvements and new product development to meet market expectations

Product Development Strategy - Accommodation

A sustainable approach needs to be taken to tourism product development in Samoa, as the country has a relatively fragile environment and strong local culture which underpin the product offering.

Samoa has a diverse range of accommodation products from budget 'fale' providers, to mid-level medium sized accommodation and small boutique resorts. This provides a strength for tourism, as it enables the destination to offer products to different niche and mainstream markets and also provides a point of differentiation and thus destination competitive advantage.

The beach fale offer a unique component of the Samoa product offering and have advantages in terms of local economic impact and employment. Beach fale operations should be encouraged to further develop, but many need additional support to ensure business sustainability and provision of service and amenity levels expected by visitors. Product development support programs (outlined below) will therefore be essential to the further expansion of this sector. Marketing support for this sector has been specifically included in the Five Year Marketing Strategy for Samoa to reflect the importance of this segment.

Future product development needs to align to the market opportunities and the needs of the key market segments identified through the research and the findings of the Five Year Marketing Strategy. Within this overarching product development strategy there is a need to implement initiatives which broadly meet the following objectives:

- Improve the quality of the products on offer and enhance the visitor experience to Samoa, with a particular focus on sustainable tourism;
- Develop new products which are consistent with the Vision for the sector and meet market needs and changing consumer demands;
- Build additional scale of the sector through new product development, to support employment, income generation and enhance the prospects for new route development and increased air services.

The last objective relating to the requirement to build to scale is further outlined below to provide clarification. The tourism sector in Samoa suffers from a lack of scale which results in a low level of critical mass to support the required infrastructure investments, transport operations and other supporting services. The relatively small scale of the sector also leads to a limited availability of private sector marketing funds and brand presence, which leads to low market awareness and impacts on the potential for aviation route development. The loss of the trans-Pacific Air New Zealand service via Samoa is evidence of this.

The lack of global hotel brands in the local market also limits consumer recognition and confidence, although the introduction of the Sheraton brand through a management arrangement with Aggie Greys is a positive development in this regard.

There is a need to increase the scale of the tourism sector in Samoa and the demand for new and existing products if the objectives relating to increased employment and earnings are to be achieved within the timeframe of this Plan. At the same time product quality needs to be enhanced to meet increasing and changing visitor expectations and provide visitors with a reasonable value proposition.

The development of a small number of larger scale resort of between fifty and one hundred and fifty rooms, managed by an internationally branded chain would have significant advantages for the tourism sector in terms of creating the critical mass to support expanded aviation services and marketing presence. Attracting such an investment will require continued concerted effort to improve the current operating and investment climate, increase air services from key markets and stakeholder commitment to implementation of this STSP.

A balanced approach to the development of larger scale resort investments needs to be undertaken, as Samoa is comprised of small communities and a fragile natural environment. At every stage of the development process, communities must be adequately consulted and made aware of the implications of decisions on whether to support proposed large scale resort development. In addition full consideration should be given to the environmental impact of any new development, through the rigorous application of the formal Environmental Impact process.

In addition development of accommodation products in the small to medium sized boutique resort market would complement the development of a small number of larger resorts. This approach is further reinforced by evidence from around the Pacific region in relation to investment which has taken place in the tourism sector. A Report by IFC²² on investment opportunities in the tourism sector in five Pacific countries indicates that growth in investment in the sector has primarily been driven by small and medium sized investments in mid to high end resorts. Small and medium sized quality resorts, generally ranging from twenty to fifty rooms offer a high level of economic impact and employment and lower social and environmental impacts. The challenge is to ensure investments are profitable and well planned.

Investment growth in the tourism sector in several Pacific countries has been characterised by the growth of the quality small to medium sized resort sector; most notably investment in small to medium sized resorts has underpinned the growth of the tourism sector in the Cook Islands and Vanuatu and has also made a significant contribution to growth of the holiday market in Fiji and Papua New Guinea.

Development at this scale offers substantial advantages for Samoa including the following;

- The scale is compatible with the current market for tourism to Samoa, which is undeveloped and small scale rather than catering for ‘mass tourism’;
- The small to medium sized resorts are of a scale where investment can be more readily mobilised; the scale of investment required would be suitable for key target investor groups within the region, including domestic Samoan investment, Samoan ex-pat investors and international ‘lifestyle’ investors from Australia, New Zealand, Europe and the USA. These latter investors have been particularly important in increasing investments in tourism in Pacific neighbouring countries which have growing tourism sectors;
- Small and medium sized resorts generally have a lower level of environmental and social impact than larger scale resorts, yet can still offer high levels of employment and economic benefits;
- Small and medium sized resorts can offer ‘boutique’ services and positioning which supports Samoa’s points of differentiation including cultural tourism and actual and potential soft adventure activities such as diving, surfing and cycling;
- Small and medium sized resorts can offer employment opportunities for local communities, without requiring a large influx of overseas labour.

Product Development Strategy – Attractions

²² Supply/Demand Gaps Analysis to Determine Tourism Investment Prospects in PNG, Samoa, Solomon Islands, Samoa and Vanuatu – IFC 2010

The cultural and natural attractions of Samoa are key in the product offering and provide a unique point of differentiation for the tourism sector. Well managed attractions can provide sustainable income for local communities and other accommodation products can benefit from the development of linkages to cultural and environmental tour products and community based tourism opportunities.

Importantly, research among the overseas trade and tourists visiting Samoa indicates that the destination has limited attractions and activities compared to some other Pacific countries and the quality of cultural tourism attractions does not rate highly in the IVS responses.

STA has conducted a review of the major natural and cultural attractions and identified the following priority sites for upgrading, including signage, information upgrading and training in visitor site management;

Location

Upolu	Palolo Deep Marine Reserve, Lalotalie River Retreat, Lake Lanot’o, Le Mafa Pass, Namu’a Island, Papapapaitai Falls, Le Vaittai water Garden, Falefa Falls, Sopoaga Falls, Papase’ea Sliding Rocks, To Sua Giant Swimming Hole, Piula Cave Pool, Sauniatu Waterfall
Savaii	Swimming with Turtles, Mu Pagoa Falls, Pe’ape’a Cave, Tafua Crater, Falealupo Canopy Walkway, House of Rock, Mataolealelo Pool, Lovers Leap, Faia’ai Beach, Mt Silisili Hike, Mt Matavanu, Saleaula Lava Ruins, Afu Aau Waterfall, Alofa’aga Blowholes, Dwarves Caves, Fuiipisia Falls, Cape Mulinu’u Cultural and Natural Attractions

A Report on Infrastructure Project Options prepared for STA under the STSP confirms the validity of upgrading the identified attractions and further developing soft adventure products around and linking individual attractions along thematic lines. This report²³ identifies a number of significant options for the further development of key tourism attractions in Samoa²⁴ including:

- Lake Lanoto’o Walkway
- The former courthouse building in Apia
- New flea market building in Apia
- Cloud forest walkway (Savaii)
- Tourist drive/trail development (on-road)
- Development of hiking and other trails on Savaii and Upolu

Improving the visitor experience to the attractions of Samoa will be a key strategy to underpin the goals of this Plan. This requires government support, but also requires a greater commitment from many communities, to improve the management and access to key sites and provide greater controls over access fees and ensure that visitors receive value for money. Local communities need to better understanding that ‘attractions’ provide an opportunity to generate income from services and that the indiscriminate levying of multiple access fees on tourists only creates a negative impression of Samoa as a destination and can reduce the overall level of visitation and income. There is a need for greater control over access fees by the Government and the community. The development of a Discover Samoa Card which includes pre-paid entry to attractions in Samoa will assist and STA needs to be more proactive in working with communities on this issue.

Opportunities also exist for the further development of soft adventure products in Samoa, particularly land based cultural and environmental tourism products. The further development of the existing key attractions and new products, is considered to be key in underpinning the future development of the tourism sector. Samoa has a number of community based environmental and cultural attractions but these need upgrading

²³ STSP: Draft Infrastructure Options Paper by Quality Tourism Development - June 2103

²⁴ The redevelopment of Apia Waterfront was also considered in this Study and this is further discussed in the Infrastructure and Access section of this Plan.

and enhancement to increase visitor satisfaction and attractions as they provide a strong point of differentiation and have the potential to be generally relatively high yielding, without being demanding in terms of supporting infrastructure.

Product development also needs to be undertaken to facilitate greater linkages between attractions (for example through integrated walking and cycling trail developments) and improvements to information and signage. Signage to attractions and information at attractions is a key issue, which rates poorly by visitors in the results of the IVS.

Directional and interpretive signage is a key component in upgrading the visitor experience related to visitor attractions; individual visitor attraction interpretive and directional signage needs to be upgraded as a priority. In the medium a series of themed self-drive cultural and environmental trails need to be developed to better link attractions and promote visitation between attractions.

A study undertaken with the support of the New Zealand Government²⁵ identifies a number of opportunities to develop products which would enhance the attractiveness of Samoa to higher yielding 'niche markets' as well as increase the linkages between existing products; these opportunities include;

- The development of cycling on Savaii
- The development of a series of Samoa's Great Walks
- The development of Drive Itineraries on Savaii and Upolu

These opportunities would strengthen the Samoa product offering in key areas and need to be pursued.

In line with the strategy of strengthening the cultural attractions in Samoa, consideration should be given to the development of a more substantive National Museum, Cultural and Performing Arts Centre. This could become a major feature of the proposed redevelopment of the

Apia waterfront and become a significant tourism attraction in its own right as well as a place of education and learning for Samoans and visitors alike.

Land use planning controls and building regulations also need to be enforced and zoning controls used to protect tourism products. Development appears to be haphazard and without adequate control over land use zones and potentially conflicting land use types. Legislation relating to land use management and zoning will assist with better control, but more detailed tourism land use zones and site classification needs to be developed through individual island based tourism plans for Upolu and Savaii, which can then be integrated into the formal planning process.

Key land and marine based natural areas are major tourism assets which attract visitors and these require further identification and protection. The further development of Marine Protected Areas in particular could be an important component of supporting marine product development, particularly diving, in the future as well as existing asset protection. Designated land and marine based Protected Areas should also be incorporated into the more detailed Tourism Plans for Upolu and Savaii, which document infrastructure and site specific recommendations. The full enforcement of existing legislation and regulations in relation to environmental and protected species is vital to the future sustainability of the tourism sector.

Integrated Product Development Program

Strengthening and improving the existing accommodation and attraction products in Samoa is a key strategy to ensure that the existing products meet consumer needs and provide value for money. An integrated

²⁵ Feasibility Assessment Report; Trail and Niche Tourism Development Options for Samoa – Feb 2014 - TRC

approach to product development is required to create quality products and support existing operators. This approach is illustrated and further outlined below under four key areas where operators require support;

**Samoa Tourism
Product
Development
Program**

Market Access and Product Distribution

- Digital/Online Operator Marketing Support and Training
 - Samoa Direct and and samoahotels.ws
 - Destinalational marketing support
-

Quality Standards

- Build Back Better - Tourism Cyclone Recovery Program
 - STA Standards and Accreditation Program
 - Attractions Development Program
 - Canine Control
 - Disaster Risk Management
 - Site Planning and Development Controls
-

Training and Business Support Services

- Workplace Training
 - Business Managment Training
 - Mentoring and Business Advice
 - Community Tourism Awareness
 - Enhancing Economic Linkages
 - Cruise Ship - Port Preparedness
-

Finance

- Tourism Cyclone Recovery Program
 - Development Bank Finance
 - Commercial Lending
-

Market Access and Product Distribution

Operators require support with market access and product distribution at two levels; the first is through the implementation of the Five Year Marketing Strategy and the development of co-operative marketing opportunities; the second level is direct operator assistance to support market access, with the major focus being on on-line visibility and distribution.

In order to support tourism operator development through enhanced on-line access and usage, an ongoing program of support needs to be delivered as part of a broader Integrated Tourism Product Development Program. The Program will also include e-marketing support, based on the current program being provided to tourism SMEs through the SPTO regional SME internet marketing program; an ongoing program of e-marketing support should be overseen by STA in conjunction with the industry associations.

Destinalational marketing will also have a greater on-line focus under the Five Year Marketing Strategy and there will be further development of the Samoa Direct on line content and the SHA/WHL site to support enhanced operator on-line capacity.

Opportunities exist to cross sell complementary products in Samoa; cross selling can provide opportunities for operators to increase revenue at little additional marketing cost, but also importantly to increase visitor satisfaction.

Quality Standards

Whilst the IVS results indicate that Samoa rates strongly overall as a destination from a visitor perspective, some aspects are highlighted through the IVS and through the trade and consumer research which indicate that product quality needs to be improved. The IFC Diagnostic also highlighted poor management of the visitor experience in terms of standards, consistency and quality.

Minimum standards for the Samoa accommodation providers were developed in 2005 to provide guidance for operators in each of the five different types of tourist accommodation to ensure maintenance of high quality and started of accommodation product. The Accommodation Standards are used as an evaluation and planning document by STA, accommodation providers and investors and is enforced through an annual inspection program by STA. There is a need to review these standards to reflect recent developments including recommendations from the National Climate Change Adaptation Strategy, technology and consumer changes, as well as consider the further development of the scheme to incorporate broader accreditation and grading of operators. The development of a grading system would provide consumer benefits by creating greater clarity for consumers regarding, standards, quality and price, which market feedback indicates is a problem in relation to Samoan accommodation product.

Incorporating sustainable development principles into tourism product development can support broader environmental and cultural objectives as well as achieve economic benefits. For example the National Environmental Sector Plan (NESP) 2013 – 2016 has as its Goal *the 'improved environmental sustainability and disaster resilience through Green Growth'*. The Plan outlines a number of high level development outcomes which can be supported through sustainable tourism development including the protection of land based and marine habitats, the conservation of threatened species and protection of biodiversity, sustainable management of natural resources and increased resilience to climate change.

In addition the current standards could be developed into a broader Accreditation Scheme to:

- Incorporate broader sustainability principles and measures into the standards to reflect the focus on sustainable tourism; these measures could be a range of sustainable measures including climate change adaptation and mitigation, as well as waste management systems and environmental impact measures.
- Further development of the categories could be undertaken to indicate the level of compliance with sustainable measures under the scheme to further reinforce the focus on sustainability of operations.
- Standards could be extended into other areas which are core activities of the tourism sector including attractions, tour operators, tour guides and taxi drivers.

Training and advice in relation to product standards is required on an ongoing basis, particularly for Fale operators and the industry associations should be encouraged to deliver advice to members to improve standards.

Training and Business Support Services

Training for tourism businesses is covered in more detail below (under the Section – HRD and Training) and the focus of this section is business training and support.

Both APTC and SBEC are well placed to deliver business training as well as broader workplace training programs. Business mentoring services, which can be supported by the NZ Business Mentoring Program and

Australian and New Zealand volunteer schemes can also be important in building business capacity and sustainability.

Scaling up agency and private business training provider capacity in business support and training activities would potentially have considerable benefits; business mentoring has particular relevance with many locally owned businesses requiring assistance with business management and marketing.

Internet marketing capacity in particular is a critical requirement for tourism operators and assistance in this area needs to be further provided (see above). STA has a role to coordinate industry wide e-marketing training which could be contracted to specialist providers and supported by 'hands on' mentoring delivered through the industry associations.

Access to Finance

Several schemes are in operation to facilitate access to finance, including the Tourism Cyclone Recovery Program following the devastating effects of Cyclone Evan. Access to finance is still a constraint for some operators but the capacity to generate profit to repay loans is the major barrier to business sustainability. IFC identified financial constraints impacting on the sector which included limited collateral, high interest rates, low profitability and in some instances limited business and financial planning and marketing planning skills of operators.

There are a number of financing schemes available for tourism operators. These are briefly summarised below:

- Private Sector Support Facility (PSSF) - PSSF is administered by the Industry Development and Investment Promotion Division (IDIPD) of the Ministry of Commerce, Industry and Labour (MCIL). The Facility aims to support those businesses and associations in the manufacturing, tourism and agriculture and fisheries sector. Funding is available in the range of \$20, 000 to \$80,000.
- Duty Concession Scheme (DCS) - the DCS is also administered by MCIL and aims to provide support for businesses in the manufacturing and tourism sectors by way of duty free imports. Tourism accommodation businesses (excluding beach fale operations) are to be approved by the Investment Committee as Qualifying Projects prior to accessing assistance from the DCS.
- Code 121 - is administered by MCIL and the Ministry for Revenue (MOR) and provides assistance for commercial handicraft manufacturers, poultry farmers, manufacturers of agricultural products, manufacturers of eel and garments.
- Tourism Cyclone Recovery Programme (TCRP) - administered by SHA, the Development Bank of Samoa and the Samoa Tourism Authority. The programme is funded jointly by the Government of Samoa and the New Zealand Aid Programme and is comprised of grant and concessional financing. The main aim of TCRP is to achieve a rapid recovery of the tourism industry and tourism based livelihoods and employment that were affected by Cyclone Evan in 2012.

The approach supported through the STSP in relation to increasing access to finance will be multi-dimensional and will include:

- Increasing the ability of tourism businesses to service loans by supporting market development through destination marketing
- Increasing the capacity to manage tourism businesses by providing business support services including mentoring, consultancy services and training in online marketing, financial management and business planning

- Improving the lending environment and reducing risks for lenders by improving the commercial legislative framework and security over assets
- Introducing a highly competitive range of tourism specific investment incentives
- Lobbying and negotiating with commercial banks for competitive interest rates

Other Product Development Issues

Disaster Risk Management

Samoa is extremely vulnerable to climate change due to its small size and remoteness, fragile biodiversity, relatively high exposure to natural hazards, low elevations and populations that are mostly concentrated in coastal areas. The recent effects of the Tsunami and Cyclone Evan only underline the importance of considering climate change impacts as part of the STSP.

The National Tourism Climate Change Adaptation Strategy (2012 – 2017) prepared by the STA (funded by the Australian Aid Programme) aims to provide strategic direction for the tourism sector in terms of increasing its resilience and capacity to adapt to the adverse impacts of climate change. The NAPA 5 – LDCF GEF Climate Change Project has included the investigation of tourism opportunities in Marine Protected Areas. The Project targets six tourism development areas (TDA) selected to be a part of a USD\$1.95 million funded project on “*Enhancing the resilience of tourism reliant communities to climate change risks*”. This project will provide support to small-scale beach tourism and accommodation operators on vital areas like shoreline protection, water resource management, design and management of facilities to withstand storms, diversification of tourism sites and activities considering increasingly varying weather conditions.

The TCRP is being implemented to facilitate a rapid and integrated recovery of the tourism sector following Cyclone Evan. The focus of the TCRP is to support the National Recovery Plan of Government for sectors affected by Cyclone Evan. As the main economic sector with the best potential for stimulating additional employment, foreign exchange earnings and Government revenues, there are strong grounds for national priority to be accorded to speeding up full recovery of the tourism sector. This programme is funded by the governments of Samoa and New Zealand through the New Zealand Aid Programme (NZAP).

The advent of natural disasters and the need for disaster risk management is closely related to climate change. Tourism operators require training and up skilling in disaster risk management and suitable strategies need to be integrated into the site and facility design components, as well as the on-going operational procedures through mitigation measures relating to emergency evacuation and guest information and briefing.

Community Tourism Awareness

Community Awareness programs are implemented through the work of the National Beautification Committee. Two annual clean-ups are held every year and led by the public sector. In addition the STA undertakes Village Roadshows to raise awareness on key tourism issues and has an ongoing programme which focusses on those Districts that hold potential for engagement with the sector either through supply of local produce, natural and cultural attractions, tours and activities or the arts and handicrafts sector. The potential outcomes from these increased awareness programs includes:

- More informed decisions for communities with an interest in tourism
- Identification of additional livelihood opportunities

- Village clean-ups, canine control and site improvements
- Greater awareness amongst youth of opportunities in the sector
- Higher levels of enrolment in tertiary and industry tourism training

At a community level the men’s and women’s village committees, churches and NGOs are key stakeholders in resolving issues for the community to address including village beautification, stray canine control, waste and rubbish collection and the management of local tourism sites. Further opportunities for village based tourism products including handicrafts and homestays need to be encouraged through the implementation of this Plan. Mechanisms to be developed to support community engagement should include community roadshows, media coverage and village meetings.

Canine Control

A lack of control of dogs is a major issue for tourism in Samoa. Concerns over dogs was the number one complaint from visiting tourists from the results of the IVS. Uncontrolled dogs are also a threat to Samoans, particularly young children.

The Canine Control Act has been passed to facilitate active management and control of dogs in Samoa; implementation of the Act appears to have been mobilised by Government through the Police Canine Control Unit with the support of the New Zealand Aid Programme and Auckland Council. The on-going resourcing of the Canine Control Programme is a priority to ensure a safer environment for tourists and Samoans alike.

Strengthening Economic Linkages

Further development of the economic value added component associated with tourism expenditure will provide broader based benefits and strengthen the linkages of tourism at the community level. This needs to be a key component in this Plan as it supports community engagement and income generation.

A report by the International Trade Centre’s (ITC) Tourism Led Poverty Reduction Program (TPRP) report for Samoa²⁶ highlights opportunities and recommends a framework for increasing supply of local fruit, vegetables, chicken and eggs for the tourism sector and for export. The aim is to reduce imports of fresh fruit and vegetables and increase the livelihood of poorer rural communities as the report finds that accommodation properties import almost 70 percent of their food and beverage products, although budget and fale operators have a higher level of local produce consumption. The ITC report indicates that out of the total imports by hotels and resorts only about 25 percent to 30 percent is all that could be replaced by local produce. This represents approximately \$SAT4 million worth of fruit and vegetable sales per annum.

An integrated approach including support aimed at enhancing the quality and reliability from primary producers, together with increased market awareness of local produce food and beverage opportunities (the Mea’ai Samoa Cook Book funded under the New Zealand funded Samoa Tourism Support Program is an excellent example of this) and skills/menu enhancement for local businesses operators could achieve substantial benefits for the economy.

Data limitations restrict a detailed analysis of the leakage factor associated with the tourism sector, but a leakage of 50 percent would not be unusual in a small island economy with high level of imports. Support needs to be provided for more of the efforts of WIBDI to support suppliers to expand the range and availability

²⁶ Sofield, Tamasese, Samoa Tourism-led Poverty Reduction Program, 2011

of primary products suitable for use by tourism operators to substitute for imports. The use of local organic produce can provide a point of differentiation for Samoa tourism and should also be encouraged.

There is further scope to build capacity of individuals and families to engage with the tourism sector in the supply of art and handicraft. This can include the supply to retailers and in tours that enable visitors to participate in production of art and handicraft. Some organisations are already working in this field, such as WIBDI’s quality handicraft program and the Tiapapata Art Centre. Partnerships with retailers and tourism operators could also be facilitated under this activity to ensure that market preferences and tastes are reflected in product designs and pricing.

Cruise Shipping

A key strategy under this Plan is to increase the economic impact of the cruise ship market to Samoa. The development of cruise shipping will be facilitated by:

- Lobbying and promoting to potential cruise ship operators for increased calls to Samoa
- Improving the cruise visitor experience through better coordination in relation to visits through the Samoa Sea Cruise Working Group and support training for local stakeholders through the Port Preparedness program
- Working with SPTO on regional cruise ship development strategies including the potential development of Pacific cruise ship hubs and fly cruise programs

PRODUCT DEVELOPMENT – KEY ACTIONS

HGH PRIORITY ACTIONS

1. **Continue to take a comprehensive approach to product development initiatives Implement through the implementation of the following activities under and Integrated Samoa Product Development Program:**
 - a. **Market Access and Product Distribution**
 - i. **Facilitate online and digital marketing training for industry operators**
 - ii. **Enhance on line presence and booking facilities for tourism products including accommodation, tours, car hire and attractions through Samoa Direct and the SHA/WHL sites and operator smartphone apps.**
 - iii. **Support product development through destination marketing including niche market development for new products such as walking and cycling trails**
 - iv. **Support cross selling between operators and joint packaging of complementary products**
 - b. **Quality Standards**
 - i. **Continue to encourage improvements to operator standards and service levels through the TCRP.**
 - ii. **Develop and Implement a Tourism Quality Standards Program to cover core tourism products in;**
 1. **Accommodation**
 2. **Attractions**
 3. **Restaurants and Cafes**
 4. **Taxis and Transport**
 - iii. **Further develop the current Accommodation Standards Program to incorporate**

- Grading/Accommodation Classification.**
- iv. Upgrade priority attractions sites through:
 - 1. Signage improvements
 - 2. On line information content
 - 3. Tour guide and visitor safety training
 - 4. Minor infrastructure upgrades to improve access and safety
 - 5. Development of the Discover Samoa card
 - 6. Improved site management through STA awareness and training and entrance fee monitoring
 - v. Resource and implement a Canine Control and management program
 - vi. Incorporate sustainability measures into the Samoa Accreditation Program
 - vii. Ensure sustainable site planning and climate change adaptation through effective development control and EIA approvals process for new developments
 - viii. Incorporate safety standards relating to disaster risk management into operator guidelines and Accreditation Program
 - ix. Development of public liability insurance for tourism operators
 - c. Training and Business Support Services
 - i. Develop and deliver an Annual Training Calendar of workplace based training modules which facilitates on-site learning in areas of priority training need and link to Accommodation Standards and Accreditation programs.
 - ii. Provide additional business mentoring support to tourism operators through the NZ Business Mentoring Program and volunteer programs.
 - iii. Implement a broad tourism community awareness program to resolve issues at a community level relating to the tourism product offering including access fees. Site maintenance and beatification.
 - iv. Further develop linkages between primary producers and tourism by:
 - a) Support through WIBDI for primary producers targeting goals in the supply chain
 - b) Increased promotion of local cuisine through destination marketing
 - c) Menu enhancement and training for local kitchen staff in local recipes
 - d. Finance
 - i. Increase the take up rate of TCRP funds through review of the criteria for training and support funds
 - ii. Lobby commercial banks for reduction in interest rates and implement enabling environment recommendations to reduce bank risk
 - iii. Provide training to operators in business planning and financial management to assist with funding applications

2. Further develop Tourism Trails to link tourism products and attract new markets; priorities include the development of Cycling on Savaii, Self-Drive Trails and development of a series of Great Walks

3. Further develop the STSP Indicators through the implementation of the GSTC Early Adopter Programme and the further development of sustainability indicators.

4. Work with regional organisations (SPTO/SPC) to further develop cruise shipping calls to Samoa and promote and facilitate development of the fly cruise market

HRD AND TRAINING

Overarching Strategy

To provide education and training which supports industry and community needs

Introduction

The Samoa Tourism Workforce Development Plan 2010 – 2012 (STWDP) indicates that a significant amount of tourism employment (approximately 75 percent) is in the hospitality sub-sector - accommodation, cafes and restaurants, bars. The STWDP estimates employment level of around 3,000 to 3,500 and more recent estimates undertaken as part of the Cyclone Recovery Program indicate that this could be as high as 5,000 jobs.

The completion of several accommodation projects currently underway including the Lamana Project at Taumesina and Saletoga Resort at Lotofaga, the Return to Paradise Resort at Lefaga and projects that are still in the pipeline (including development of the second Tanoa branch at Matautu Tai and Warwick at Vavau), will generate more demand for labour in the industry. In addition the building back better of some of the properties affected by Cyclone Evan will also contribute to more job opportunities for the sector.

This increase in the projected size of the workforce will also require scaling up the delivery of training, both in terms of content, but also in terms of making training affordable for those who wish to enter the workforce. There would be benefits in scaling up the level of NUS tourism and hospitality scholarships to encourage this entry level training, as well as increasing the level of workplace training available.

In addition to the job opportunities in the accommodation sector, consultation under the STSP indicates that there is a requirement for additional skilled and qualified guides and attraction managers to ensure better delivery of the tourism products relating to the attractions sub-sector.

The most common skill gaps across the industry fall into four main areas and include:

- English language – conversational and basic numeracy and literacy
- Computer skills
- Customer service
- Small business management (financial management/bookkeeping, personnel, marketing).³

Current and Future Tourism and Hospitality Staff Needs - 2010 – 2015 by Sub-sector

(Direct Employment)

Tourism industry sector:	Estimated number employed in 2010 [2001 figures in ()]	Estimated number of additional staff needed by 2015 (low-high) (7)	Estimated total number employed by 2015 (low-high)
Accommodation (1)	1,500 - 1,600 (1,160)	500 - 750	2,000 – 2,350
Restaurants, cafes (2)	570 - 600 (350)	130 - 200	700 - 800
Tours, Activities and Attractions (3)	150 - 180 (130)	50 - 70	200 - 250
Travel Agents	35 - 45 (n.a.)	10 - 15	45 - 60
Airlines / airport (4)	400 - 450 (380)	50 - 100	450 - 550
Car Rentals (5)	150 - 175 (60)	20 - 40	170 - 215

Souvenirs and Handicrafts (6)	220 - 240 (50)	50 - 75	270 - 315
Totals	3,025 – 3,290		3,835 – 4,540

Source: STWDP 2010-2012

Consultations indicate that tourism employment is regarded by many people as low-skilled jobs with low wage rates; in addition employment is often seasonal. This leads to a high level of staff turnover which the STWDP estimates at approximately 10 to 30 percent.

A number of stakeholders have important roles in relation to tourism and hospitality training and HRD development as follows:

- MESC is mandated to provide primary and secondary education with support provided as well for early childhood and special schools. The principal function of the Ministry is to promote and encourage the development and improvement of all phases of education in Samoa. Its domains are in the schools sub sector in primary and secondary education and include mission and private school systems.
- SQA is the principal organization mandated in broad terms to:
 - provide policy advice, monitor and report to government on strategies, priorities, performance, resourcing, and activities of the Post School Education and Training (PSET) Subsector
 - Quality assure and regulate qualifications and quality standards for Post School Education and Training (PSET) in Samoa; and
 - Coordinate, monitor and strengthen PSET
 - SQA's scope of work deals mainly with post school education and training (PSET), an inclusive term referring to the evolving subsector of education which includes universities, TVET training, apprenticeship, pre- and in-service professional training, theological and religious instruction, non-formal, on the job training.
 - SQA National Competency Standards and Framework have been developed in consultation with the Tourism Training Taskforce and other stakeholders. Both documents have been endorsed by the Generic Skills Advisory Group and Framework Committee.

Primary and secondary school levels currently have limited tourism curriculum. Consultation reveals strong support for early education on tourism through the education system to effect changes in attitude and increase awareness of opportunities and benefits. As tourism is seen as the main economic driver for the economy, there is a need for the MESC to strengthen the educational content on tourism at both primary and secondary levels to ensure greater education and effective understanding of the significance and opportunities tourism affords/provides.

Two public sector institutions provide formal tertiary training and education in tourism. The Institute of Technology (National University of Samoa, NUS) provides a one-year Certificate in Tourism and Hospitality and a two-year Diploma in Tourism. These equate approximately to Levels 1 and 2 of the New Zealand and Australian qualifications frameworks or Levels 2 – 4 of the proposed Samoa Qualifications Framework. Four to six tutors deliver the Certificate and Diploma courses. Members of the industry also provide input as guest speakers. Students require a 4 – 5 week work placement as part of the course. In most cases, work placements are relatively easy to arrange. The Martin Hautus Institute of Learning is also registered with SQA and delivers training in tourism and hospitality at Certificate level.

The NUS uses an Industry Advisory Panel to help ensure that courses are aligned to industry needs. Recently, working relationships have been forged with the Manukau Institute of Technology and Victoria University of Wellington, New Zealand, to strengthen qualification pathways for students and tutors.

Established in Samoa in 2008, the Australian Pacific Technical College (APTC) provides Level 3 (Australian Qualifications Framework) certificate courses in three occupational fields of tourism hospitality and professional cookery. APTC attracts students from within Samoa and across the Pacific. A blended Level 3 course in tourism, hospitality and cookery started on Savaii in late February 2010, delivering certified modules in the workplace. APTC also offers a Level 4 Certificate in Training and Assessment for all sectors. This is aimed at trainers, managers and supervisory levels and runs two nights per week for one year, enabling participants to work and study at the same time.

The APTC and NUS share tutors for the NUS Diploma. STA also provided assistance for the Diploma program during Semester 1, in 2013. The Prime Minister and the Minister of Tourism approved the establishment of Tourism scholarship scheme from STA with NUS to support the T&H program at both levels. A standard amount of SAT \$50,000 was approved however fees tend to increase every year and so is the funding arrangement for scholarships. An upgraded teaching kitchen provides NUS students with a much-improved facility.

Although APTC is likely to have a presence in Samoa until at least 2014, there is no guarantee of its presence after that. Without APTC, the NUS would become the only provider of formal tourism training and education in Samoa.

APTC represents a substantial asset to Samoan tourism. Not only do students benefit from the Certificate level courses but the institution is also able to manage and deliver broader workplace training programs. This capacity is being harnessed through the TCRP training component but further opportunities need to be explored and supported.

APTC reports difficulties in achieving enrolment by students in courses; this appears to be related to the availability of those in the workplace to undertake full time training for lengthy periods. Options for different delivery methods should be explored to facilitate broader based training, including delivery in the workplace and shorter courses.

Tertiary Tourism Courses in Samoa

Institution	Course	Students enrolled
NUS	Certificate in Tourism and Hospitality (1 yr)	70
	Diploma in Tourism (2 yr)	40
APTC	Level 3 Certificate in Tourism (6 month) ST\$708.00 per student	18 - 20
	Level 3 Certificate in Hospitality ²⁷ (6 month) ST\$790.00 per student	18 - 20
	Level 3 Certificate in Hospitality (Commercial Cookery) (6 month) ST\$1,110.00 per student	18 - 20
	Level 3 Certificate in Hospitality (Patisserie) (6 months)	18 - 20
	Level 3 Certificate in Hospitality (Food Processing and Retail) (6 months) FJ\$4,356.00 per student	18 - 20
Martin Hautus	Level 2 Certificate of Tourism	

Institute

Levels 1 and 2 Certificate in Hospitality

STA also facilitates a range of workplace training; the following indicates the range of training being coordinated:

- In 2012, STA coordinated training in Customer Service and Business Planning. Each training was delivered in six (6) locations covering both Upolu and Savaii. The number of participants that were trained was between 150 -200.
- In conjunction with the Australian Government through its AYAD Program delivered Surf Life Saving training for the industry which commenced in 2010.
- Port preparedness workshops and e-marketing workshops in conjunction with SPTO and PITI.
- Training provided under the TCRP includes:
 - 20 fully funded carpentry scholarships for the Build Back Better Cyclone strategy.
 - ADRA Project of APTC - trainees will have the opportunity to do further training in Fiji - relating to TCRP
 - NZ Government is providing \$500,000 for Capacity Building of the sector under the TCRP and APTC has been contracted to design and deliver training that will commence February 2014.

STA has also produced (with the assistance of NZAP STSP) a series of self-training manuals for Beach Fales, Attraction Sites and Tour Guiding, which will be launched in July 2014.

STA also plays the lead role in HRD policy and training needs analysis; STA has worked closely with VERT/FESSA in mapping out alternatives and solutions to upkeep training not only for the industry but as well with schools and communities - ASOP Grant/Regional days/MESC. Key areas of training demand which have been identified include:

- Cookery/Chefs
- Tour Guiding
- Customer Service/Frontline personnel
- Climate Change - Disaster Preparedness
- Site Management training
- E-marketing
- Website Development and upgrade
- Business Planning - writing proposal
- Financing

Industry consultations undertaken as part of the STSP development indicate that there is need to develop a branch of the University/Tourism School in Savaii. This is to counter problems of distance and for Savaii to also have the same benefit and access to learning as for those in Upolu.

The Tourism Training Taskforce has been established by STA and undertakes an important coordination role and public/private sector input into training activity design and coordination. This body plays an important role in public/private liaison and identifying priorities.

The design of six workplace training modules has commenced under funding from the STSP. A Training Needs Analysis will be undertaken as part of this project to determine the priority modules to be developed and

training will be provided to local training providers to facilitate capacity development. Capacity building for local training providers will also be undertaken as part of the development of the training modules.

The workplace training modules will provide the basis for the development and delivery of an Annual Tourism Industry Training Calendar as recommended in the Samoa Tourism Workforce Development Plan. This training outline opportunities for operators and will be coordinated by STA. Training delivery will be measured and monitored by STA to ensure relevance, outcomes and value for money are achieved.

NUS have also identified the need to upgrade their tourism training facilities. The development of a model hotel room facility within NUS together with a designated computer room and facilities/reservation system will be provided also for the Front Office program. Based on external review report for NUS curriculum there is a great need to improve the reservation area of learning for the students. Furthermore trainings for tutors at a higher level is also being planned to build capacity and improve the level of training. There is a need to increase the level of scholarships for trainers in tourism and hospitality to support capacity development. In addition to industry training there is also a need to build capacity within the industry key government agencies to facilitate tourism development. Informal attachments have assisted in this regard (for example with AUT and SPTO). These types of arrangements should be expanded to facilitate attachments for operators to expand product knowledge and learning and for officials to expand their knowledge by working with sister agencies. Short term training attachments can also be used in this regards and several donor programs facilitate these opportunities for the public and private sector including the PSSF and in NZAP in country training program.

As the lead agency for tourism, the capacity and skills of staff and management within STA is critical to the development of the sector. In order to build further capacity a more thorough analysis of training requirements and capacity building should be undertaken and implemented as part of this Plan.

There is a need to update the 2010 Samoa Workforce Development Plan to reflect changing supply and demand factors and training needs and gaps, as well as the wide range of training opportunities and available courses.

HRD and TRAINING – KEY RECOMMENDATIONS

HIGH PRIORITY

- 1. Develop and implement an Annual Tourism Industry Training Calendar.**
- 2. Increase the level and intensity of e-marketing training for operators through short courses and hands on training supported by mentoring and business support**
- 3. Develop a Capacity Building Plan for STA staff and management highlighting individual training needs and competencies**
- 4. Implement broad based community awareness program**

MEDIUM PRIORITY

- 5. Increase the number of scholarships available for tourism and hospitality through donor programs.**
 - 6. Incorporate the content of the revised Manuals (Beach Fales, Attractions and Tour Guiding) into the Workplace Training modules and Annual Training Calendar.**
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7. Increase the level and intensity of e-marketing training for operators through short courses and hands on training supported by mentoring and business support.
 8. Improve the tourism and hospitality training facilities at NUS by developing a dedicated tourism training center with model bedrooms and reservations center
 9. Introduce tourism as a compulsory subject into the secondary education system
 10. Undertake a feasibility study on the demand for establishing a dedicated NUS tourism and hospitality training facility on Savaii.
 11. Extend the current scholarships program for NUS students in tourism and hospitality.
 12. Revise and update the Samoa Workforce Development Plan 2010 - 2012
 13. Increase linkages with overseas institutions and agencies to facilitate short term attachments of key staff, trainers and officials
-

INFRASTRUCTURE AND ACCESS

Overarching Strategy

To increase destination competitiveness through increased accessibility, infrastructure use and maintenance

Introduction

Major infrastructure improvements require careful consideration and assessment; investments are costly and need to be closely aligned to market demand. The provision of infrastructure upgrades will not necessarily lead to additional visitation, although additional services and product development can be facilitated where unmet market demand is evident.

Well-conceived, relatively minor infrastructure upgrades can have a significant impact in terms of the development of the tourism product offering. For example, signage and access roads to key attractions sites is vital to facilitate visitor flows, timely opening of pre-flight immigration facilities and improvements to passenger information and customer handling on the inter-island ferry would increase visitor satisfaction levels.

The prioritisation of these minor tourism related infrastructure needs is not currently undertaken as infrastructure planning generally focuses on the larger infrastructure projects such as roads, ports, airports and utilities. One mechanism for the further identification and documentation would be to incorporate them into more detailed Tourism Development Plans for Upolu and Savaii. These Plans could also identify priority zones and sites for tourism development, including scale and facility type for incorporation into broader land use planning.

The National Infrastructure Strategic Plan (NISP)

The National Infrastructure Strategic Plan (NISP) provides the basis for the government investment program in infrastructure in the medium term. NISP provides *'an integrated program of new investments and supporting initiatives reflecting the Government of Samoa's aspirations for the economic infrastructure sector'*.

The NISP (2011) clearly outlines the priorities for Government across key infrastructure components which have a significant impact upon the tourism industry as well as the everyday lives of Samoans, namely; energy (electricity, fuel), telecommunications (telephone, internet, broadcasting), water and waste related services (water supply, waste water, drainage, solid waste) and transport (airports, roads, sea ports).

In recognising the limited funds and need to prioritise investment, the NISP provides an integrated program of new investments and supporting initiatives reflecting the Government’s aspiration for the economic infrastructure sector. The Government priorities are structured around the specific development priorities for each sector as follows:

Sector	Strategic Directions
Energy	<ul style="list-style-type: none"> Investing in renewable energy More efficient use of energy
Telecommunications	<ul style="list-style-type: none"> Improved domestic and international connectivity
Water	<ul style="list-style-type: none"> Reliable, affordable water supply Improved waste water management
Solid Waste	<ul style="list-style-type: none"> Sustainable waste management
Roads	<ul style="list-style-type: none"> Samoa Economic Corridor
Sea Ports	<ul style="list-style-type: none"> Meeting international sea freight need
Airports	<ul style="list-style-type: none"> Supporting international air travel and trade
Multi Sector	<ul style="list-style-type: none"> Climate change and disaster risk reduction Streamlining government responses Making better use of existing infrastructure Improved planning and evaluation

A large number of major infrastructure projects are already underway in Samoa which will reduce the cost on sector inputs including,

- Samoa Power Sector Expansion Project
- Water (Sector Budget Support Program)
- Sanitation and Drainage Project (SSDP I/II0)
- Roads (SIAM 2)
- Tsunami Recovery
- Cyclone Evan Recovery Program
- Samoa Infrastructure Asset Management (SIAM2)
- Upgrade of Faleolo based on Airports Master Plan
- Passenger and freight facilities at Aleipata
- Extend container park at Port of Apia

Additional priorities have been identified through the NISP assessment process. The (thirty five) future priority projects identified through the NISP are set out below:

Sector	Project
Energy	Clean Energy Fund
	Large On Grid Solar Generation
	Other Renewable Energy Implementation
Telecoms	Update National Strategic Plan for ICT
	AM Radio Transmitter
	Second International Fibre Optic Cable
	Upgrade National Broadband Network
Water	Improved water supply for Manono (desalination)
	SSDP Stage II

Solid Waste	Prepare National Waste Management Strategy
	Additional land fill facilities (Upolu, Savaii)
Roads	Upgrade of Vaitele St between Lepea and Vailoa
	Feasibility Study for Apia – Faoleolo Corridor
	Upgrade of Vaitele Street to Vaitele
	Upgrade of Fagalei Street
	Feasibility Study for Vaitele Street to Port Corridor
	All weather roads program - Savaii
	Upgrade Aleisa Road
	All weather roads program - Upolu
	Rural Access roads program
	Program of new footpaths
	Upgrade of Upolu cross Island Road through Vailima
Ports	Reconfigure channels/breakwater at Apia
	Prepare a National Ports Plan
	Improve access to Manono (wharfs, terminal)
	Renovate the inter-island passenger terminals
Airports	Refurbish fire tenders
	Second runway at Faleolo
Multi sector	Prepare National Coastal Protection Strategy
	Climate Change Adaptation Projects
	Disaster Early Warning System
	Prepare National Asset Management Policy
	Prepare outstanding sector plans (transport)

Tourism related infrastructure is particularly vulnerable to natural disasters. The NIS identifies priorities for infrastructure planning in relation to ‘Disaster Response and Infrastructure Planning’ and this program needs to be put into effect as part of the NISP implementation process.

Energy

The MCT Sector Plan indicates that it is critical that the necessary regulatory reforms are undertaken to allow increased generation capacity, with the private sector playing an important role. The following reforms are considered a priority:

- Amendment of the Electricity Power Corporation (EPC) Act or enactment of the Electricity Act to allow private power generation and resale.
- Establishment of an independent regulatory environment putting the EPC and private generators on a level playing field

The adoption of renewable energy options should be encouraged by the sector and donor support for subsidised investment by tourism operators should be explored. Several regional programs are being undertaken in regard to climate change resilience, mitigation and adaptation including the ADB Promoting Energy Efficiency in the Pacific (PEEP) Phase 2 and through the UNIDO Renewable Energy and Energy Efficiency for Industry in selected Pacific countries - Energy Audits. Regional efforts supporting mitigation and adaptation such as the ‘*Coping with Climate Change in the Pacific Island Region Project*’ being implemented by GIZ/SPC and adaptation need to be supported and translated into action by the local sector as well as supported through the implementation of parallel approaches by the Government, SOEs and NGOs.

Internet

The availability of fast and reliable internet connectivity has become a pre-requisite to being able to operate a tourism business successfully. The Government needs to ensure that internet coverage across Samoa is

improved as a key part of the business enabling environment. The requirements of the tourism sector should also be highlighted in the IT Sector Plan currently being developed by the Government.

Aviation and Route Development

Trade research in 2013 identified flight access as a barrier in major source markets of Australia and New Zealand. Three secondary market representatives also highlighted air access as a barrier. In the case of secondary markets, reliance on carriers servicing an intermediate destination will always be a barrier to growth. Key areas to address from a route development perspective include:

- *New Zealand.* All but 2 flights per week arrive/depart late night/early morning and all Virgin Samoa flights provide no onward domestic connections (previous schedule was reverse – no northbound connections). This has direct impact on New Zealand market beyond Auckland and overall holiday experience.
- *Australia.* Virgin Samoa entered the market in 2005 delivering a consumer friendly flight schedule between Australia and Samoa. This resulted, along with increased capacity and marketing, in a major increase in holiday arrivals. During the past 2 years schedule has been realigned (ironically to accommodate additional services between Sydney and Fiji) and there has been a slowing in real growth and flight access is again seen as the major barrier from Australia.
- *Europe.* The loss of Air New Zealand's weekly connection via Los Angeles has had an impact on the marketability of Samoa, although numbers seem to have steadied. Two opportunities on this front exist. Via North America, connectivity with Fiji Airways (see *North America* below). Via Middle East/Australia development of code-share through fares between Virgin Samoa/Australia and Etihad Airways. This will give access from 30 plus European cities via the Virgin/Etihad alliance.
- *North America.* The cancellation of Air New Zealand's direct service in 2009/10 has seen a marked decrease in North American holiday arrivals, although the VFR market has been less affected. There is perhaps an opportunity to explore options with Fiji Airways expanding fleet and services between Fiji and Los Angeles earmarked to increase to 6 per week.
- *Asia.* Current market size does not warrant direct services between Samoa and Asia. However there are opportunities, especially via Fiji for connectivity, through fares and improved access. The key to this market in the interim is to establish dual destination marketing. There are certainly possibilities via SPTO and/or established inbound operators in Fiji. Similarly there may be opportunities with Virgin alliances via Sydney (Hong Kong) and Air New Zealand via Auckland (Hong Kong, Seoul and Japanese ports). There have also been some discussions regarding a potential for one or two of Air New Zealand's daily Shanghai services to route via Nadi.

Air transport and route development is clearly a vital component of the tourism supply chain; the development of emerging markets such as China, will be highly dependent upon the development of improved air access. Currently access to Samoa from this market is via Fiji, Hawaii, New Zealand or Australia. The development of direct scheduled services to China would require substantial investment in new tourism products (aimed at the Chinese market), combined with substantial funding for market development and promotional support.

It is unlikely direct services will commence within the period of this Plan. Greater potential exists for the development of charter services, although this is likely to require substantial investment in marketing support

and commitment from inbound operators. Greater opportunities exist to promote Samoa to the Chinese market as a dual destination package with Fiji and/or New Zealand/Australia. This option will not require substantial investment in infrastructure, but will require investment in marketing support and promotional and market development cooperation with Fiji. Research by IFC concludes that demand from China for this dual destination Pacific package will take several years of concerted effort to achieve any noticeable growth in arrivals.

The withdrawal of the Air New Zealand Trans Pacific service from Los Angeles to Auckland (via Apia) has further reduced the travel options to Samoa for the North American and European markets. This has been detrimental to these markets and has contributed (along with the GFC) to the 30 percent decline in European visitation and eleven percent decline in visitors for the US market since 2008.

Supporting the expansion of trans-Pacific air services via Samoa, remains an important objective for the tourism industry and Government efforts will continue to focus on working with all trans-Pacific operators to extend air services via Apia. The development of additional accommodation products will enhance the appeal of Samoa from a route development perspective as critical mass increases.

Samoa already has a conducive enabling environment for air services as demonstrated by the flexible Air Service Agreements, the partnership with Pacific Blue and the encouragement of code share services by other carriers. Research conducted in developing this Plan however indicates that the scheduling of arrival and departure times from the major short haul markets, is a major deterrent for the holiday market. Samoa is already disadvantaged by being further away from the major markets (particularly Australia) and the relatively high cost of international fares (again particularly to Australia), as well as less frequent services (again for Australia) compared to some competitors such as Fiji and Vanuatu. When the unsuitable arrival and departure times are added into the mix, Samoa loses its appeal for many potential holiday visitors. The Government needs to work with the airlines to review the scheduling to make the times more conducive to the holiday market. Marketing support to carriers should be used to incentivise this partnership arrangement and to encourage the airlines to provide more attractive schedules and fares aimed at the holiday market.

Another consequence of the current schedules is limited connection options at the point of disembarkation (particularly New Zealand). Schedule changes as outlined above would assist in addressing this issue. Connectivity could also be improved by regional airlines working more closely to facilitate SPTO and ASPA initiatives to improve connectivity at a regional level which should be strongly supported.

Apia Waterfront Re-development

The Government has identified the redevelopment of the Apia waterfront as a major infrastructure project which will provide a focus for tourism as well as recreation by Samoans.

The Report on Infrastructure Project Options prepared with the assistance of the STSP²⁸ identifies the broad scope and benefits of the proposal. The Report identifies that the improvements to the Waterfront could include the following:

- Providing visitors with an iconic promenade with interesting viewpoints, shaded areas, landscaping, lighting treatments and potentially artwork may all be required to create an iconic experience for visitors. The initial focus may be between Aggie Greys Hotel and the Visitor Information Centre;
- A cultural/traditional crafts centre and conservation of iconic heritage buildings;
- Beach area restoration including picnic areas, shaded areas and potentially toilets/changing areas;
- Waterfront master planning including improvements to the cruise passenger arrivals area.

²⁸ STSP Report on Infrastructure Options – Quality Tourism Development – May 2013

The Government has embarked upon the initial master planning and more detailed scoping of the redevelopment with the assistance of the Government of New Zealand.

Inter-Island Ferry Service

The Savaii – Upolu ferry service is a key transportation component of the tourism sector. The results of the IVS indicate that the ferry service does not have a high satisfaction level amongst tourists. Samoa Shipping Corporation need to make the service more tourist friendly by:

- Enabling on line booking and ticketing
- Reviewing the passenger processing and terminal infrastructure, to improve customer service, improve signage and provide clear instructions for visitors
- Ensure departure/timetabling is regularly updated on the internet
- Target customer feedback/improvements by undertaking a visitor survey aimed at tourists using the service

Where feasible, ferry schedules should be compatible with international flight arrival and departure times, to facilitate a seamless transfer for visitors to Savaii.

INFRASTRUCTURE AND ACCESS – KEY RECOMMENDATIONS

HIGH PRIORITY

1. Finalise the scope and cost of the Apia waterfront redevelopment and phase the project implementation according to budget and impact.
2. Negotiate for improvements to scheduled flights from major markets of Australia and New Zealand to improve the appeal to the holiday market.
3. Further review the options and multi-lateral air services agreements to facilitate additional trans-Pacific services including extension of Hawaiian Air Services or additional Fiji Airways services.
4. Support the regional initiatives in relation to synchronising of regional air schedules to improve connectivity and a common open skies agreement within the region
5. Facilitate improved internet coverage and speed for all tourism operators through the IT Sector Development Plan priority recommendations.
6. Improve the ferry passenger services for tourists through improved signage, passenger handling, on line booking system and monitoring customer feedback

MEDIUM PRIORITY

7. Implement the required regulatory reforms in the energy sector to facilitate private sector providers and enhance further regulation of the sector under The Regulator’s Office
8. Support the adoption of renewable energy by tourism operators and negotiate donor subsidies to facilitate adoption.
9. Develop Tourism Plans for Upolu an Savaii which identify minor infrastructure developments including:
 - a. Product development opportunities and linkages
 - b. Access roads to identified key tourism attractions;
 - c. Potential and actual designated protected areas
 - d. Signage requirements in relation to key sites and the development of thematic culture and

natural attractions trails.

10. Continue with the implementation of the medium term infrastructure priorities established through the NISP including in the areas of:
 - a. Energy
 - b. Telecoms
 - c. Water
 - d. Solid Waste
 - e. Roads
 - f. Ports
 - g. Airports
 - h. Multi Sector projects

6. Implementation Structure

Tourism Sector Management and Coordination

The STSP provides a prioritised tourism sector development and management framework and is recognition by the current Government that a more coordinated and prioritised approach is required to support tourism sector development. The level to which implementation of this Plan is adequately coordinated and resourced, will however, ultimately determine the success of this sector wide approach.

Tourism is cross-sectoral with a complex value chain involving a wide range of stakeholders. The tourism product is multifaceted, as the tourism product is essentially experience based, involving a range of services such as accommodation and transport, but also impressions and experiences created through interaction with the local community and the host environment. Delivery of the product therefore requires a high degree of coordination and awareness of the importance of tourism at every level of the community.

The IFC Tourism Sector Diagnostic (May 2010) highlights a number of impediments including:

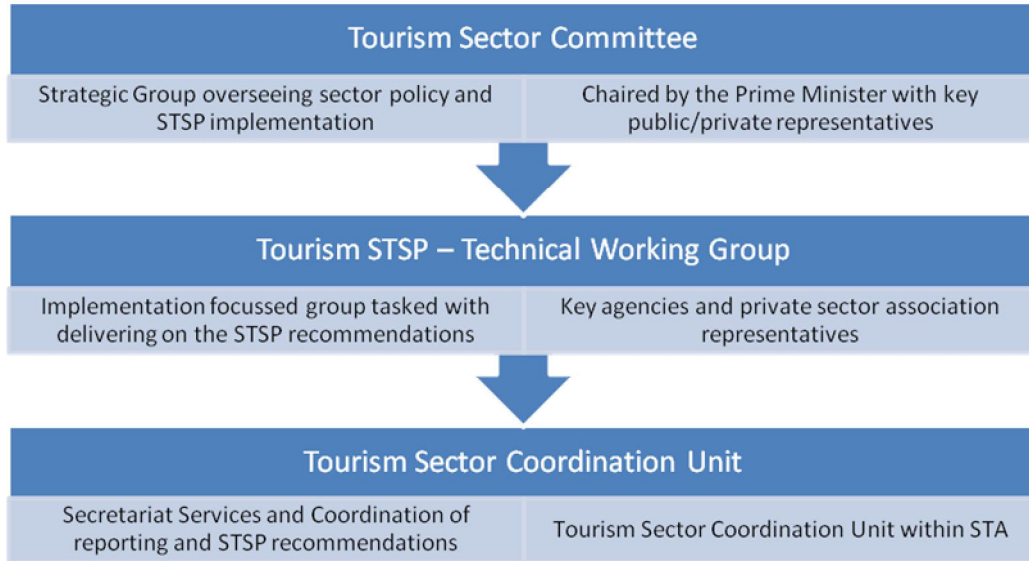
- Limitations on the implementation of the STSP due to the absence of any formalized implementation process and the requirement for greater cohesion and coordination across the public sector. The Report comments that *'Samoa Ministries appear to operate independently of each other and not reflect or assist in achieving the priorities of other agencies. This is a Government wide issue, rather than a tourism management issue, but while it exists it limits the ability to initiate change outside of the remit of STA.'*

Consultations undertaken in preparing this Plan indicate that some attitudes are not conducive to tourism development; some communities view tourism as a way to generate cash without having to work for it. Community awareness raising of the opportunities tourism affords, as well business support mechanisms to realise those opportunities, will be critical to the medium term success of the STSP and delivery of broad based benefits.

Destinations which have been successful in developing tourism as a substantial and sustainable industry have developed a prioritised and planned approach which is supported by a coordinated public/private approach to development. This requires every stakeholder to understand their role and play their part; this is not easy to achieve, but is fundamental to successful development.

In order to facilitate a more coordinated and prioritised approach to the development of the tourism sector, three interrelated and complementary institutional structures need to be established and resourced. The

relationship and core function of each of the coordinating groups is summarised in the diagram below and outlined in more detail as follows:



Tourism Sector Committee (TSSC)

The Tourism Sector Committee (TSSC) is the high level body with oversight for sector policy and is chaired by the Hon Prime Minister and Minister for Tourism. The TSSC is a public – private sector collaboration established in 2011; representation on the TSSC consists of:

- Hon Prime Minister (Chair)
- CEO Samoa Tourism Authority
- President Samoa Hotels Association
- President Samoa Savaii Tourism Association
- CEO Ministry of Women, Community and Social Development
- CEO Ministry of Finance
- CEO Ministry of Commerce, Industry and Labour
- New Zealand Aid Programme Representatives
- CEO Ministry of Natural Resources and the Environment

The TSSC should meet every six months to discuss progress on the STSP recommendations. For each STSP recommendation the designated agency should be charged with providing a quarterly update on progress to the TSSC.

A review of the STSP priorities and recommendations should be undertaken by the STA every six months and a report provided through the TSSC to the Cabinet Development Committee (CDC) and Cabinet.

STSP – Technical Working Group (TWG)

A STSP TWG will be established to ensure coordination and technical support and input into the recommendations. The role of the TWG is to focus on the implementation and coordination of the identified recommendations.

The TWG should meet every month and be chaired by the STA CEO with the Tourism Sector Coordination Unit (below) providing Secretariat support. The members of the TWG will be required to report to the Chair at the TSSC meetings on achievements and progress against the Implementation Plans. Members of the group will primarily be drawn from the lead agencies and organisations with responsibility for implementing the STSP.

Tourism Sector Coordination Unit (TSSCU) - STA

To improve the coordination of the tourism sector development and support the implementation of the STSP across all stakeholders, a Tourism Sector Coordination Unit will be established within the STA and be headed by the Tourism Sector Coordinator.

7. Monitoring and Evaluation

STSP Logframe and Action Plans

The key component of the STSP are the monitoring and evaluation mechanisms which are presented in this Section.

A Logframe has been developed for the STSP which relates the Plan Goals and Outcomes to the Subsector Outcomes, Programmes and Outputs to be achieved (Annex B). This Logframe will support the Monitoring and Evaluation of the implementation of the Plan.

A two phased approach to implementation and sequencing of priorities is supported by the development of Action Plans, based on the recommendations identified through the STSP and outlined in Section Five. These Action Plans summarise the implementation program for the STSP five-year period implementation. And are divided into High and Medium term priorities.

The Action Plans identify:

- The priority STSP recommendations for implementation as follows:
 - High Priority – within the next two years
 - Medium Priority – within the next three to five years
- The key initiative and follow up actions required;
- The stakeholders with lead responsibility for implementation; and
- The budget required.

There will be a need to revise these plans annually to reflect progress in implementation as well as new priorities, which have arisen. The TWG and TSSC should review progress on implementation of the Action Plans at their meetings.

Performance and Monitoring

Effective monitoring of the STSP is vital to ensure that:

- Resources provided are utilised effectively

- Programmes and activities are taking place as and when intended
- The programme goals and outputs are being achieved together with an assessment of progress towards the high level indicators.

The STA will be responsible for collating and monitoring the data for STSP activities.

The TSSC should meet every six months to discuss progress on the STSP recommendations. For each STSP recommendation the designated agency should be charged with providing a quarterly update on progress to the TSSC.

A review of progress of the implementation of the STSP priorities and recommendations should be undertaken by the STA every six months and presented to the TSSC; the Report should also be provided through the TSSC to the CDC and to Cabinet.

Tourism Forum – Annual Review

The TSSC Chair will convene an annual Tourism Forum as a key part of the annual review of the progress of the STSP; this Forum will involve representation from national stakeholders as well as donor partners. Before the Forum, STA will provide a STSP Progress Report outlining progress since the last Annual Forum and an assessment of implementation against the Action Plans and progress toward the achievement of the indicators and outputs under the Logframe (Annex B).

CDC Progress Report

Following the Annual Tourism Forum a final STSP Annual Progress Report will be presented to the CDC for consideration and endorsement.

Mid-term Review

A Mid-term Review of the implementation of the Plan should be undertaken after a period of two years, to highlight progress, identify any constraints, assess any lessons learned and review priorities, in the light of implementation and the changing internal and external environment.

Monitoring and Evaluation Framework

A Monitoring and Evaluation Framework is presented in Annex E; the Framework uses the high level indicators which are set out in Section Four of the Plan and establishes targets and growth rates for the five year implementation period. This framework will be used as part of the reporting requirements to the TSSC and CDC.

8. Resourcing Framework

Budget Estimate and Medium Term Expenditure Framework

In order to implement the recommendations of the STSP an increase in resourcing is required. This requires a level of commitment from the Government to grow the sector. Equally though the STSP is a partnership between the public sector, private sector and donors who each have their own role to play in supporting implementation.

High level budget estimates have been developed for the five year period of implementation, commencing in the financial year 2014/15. The budget estimates are illustrated overleaf for each Programme Area by anticipated year of expenditure. The total budget over the five year period required for implementation is \$SAT 82.53 million.

A Medium Term Expenditure Framework has also been developed for the STSP to reflect the Programme activities, sequencing and the identified government and donor funding requirements. The MTEF is presented in Annex D.

STSP – Five Year Budget Requirement

	<i>Year One</i>	<i>Year Two</i>	<i>Year Three</i>	<i>Year Four</i>	<i>Year Five</i>
	<i>2014/15</i>	<i>2015/16</i>	<i>2016/17</i>	<i>2017/18</i>	<i>2018/19</i>
STSP Programme Area					
Marketing and Research	10.00	9.80	9.80	9.80	9.80
Business Enabling Environment and Investment²⁹				0.30	0.30
Product Development	6.82	3.65	2.80	2.30	2.30
HRD and Training	1.55	1.55	2.48	2.10	1.78
Infrastructure and Access³⁰	1.14	0.53	1.15	1.03	1.03
TOTAL³¹	19.51	15.53	16.75	15.53	15.21

²⁹ Excludes priorities already budgeted under MTC Sector Plan

³⁰ Excludes Infrastructure priorities already budgeted under NISP and Apia waterfront redevelopment

³¹ All figures in 2014 values with no adjustment for inflation

ANNEX A – Review of STDP 2009 – 2013

DESTINATION PROMOTION AND MARKETING			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
<i>i.</i> Build and market the 'Samoa Experience' as a unique, exotic nature based, aspirational must do experience complete with bragging rights	✓		<p>Samoa brand tool-kit developed to guide the 'look and feel' and positioning statements of all destination advertisements which are communicated via multiple channels including digital, television, radio and print/press. Key design features of the brand-guide include:</p> <p>Key design features:</p> <ul style="list-style-type: none"> • The unique Tapa band and block colour behind the headlines • represent the vibrant colours and designs of Samoa. • Images need to be engaging and uniquely Samoan. • Quirky headlines are designed to intrigue the reader. • The Samoa brand is to be hero, with trade partner branding at 50% size. • Price points need to stand out. • Copy is brief but touches on distinctive attributes including Fa'a Samoa, natural wonders, cultural aspects and a range of accommodation choices. These are also addressed more in PR with storytelling.
<i>ii.</i> 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.	✓		<p>Ongoing development of Samoa.travel as the main online portal for destination information, providing comprehensive visitor and product information, packaged deals and accommodation and flight bookings via Samoa Direct (i.e. booking widget) remains a key part of the digital strategy. Social media platforms have also been developed and integrated to ensure cross-linkages and overall consistency.</p>
<i>iii.</i> Examine how existing and new products can better be utilised and repositioned to cater for new geographical or psychographic segments, or new services.	✓		<p>STA continues to provide strategic marketing advice for new and existing products in relation to market needs, requirements and distribution channels to ensure effective positioning.</p>

<p>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.</p>	<p>✓</p>		<p>STA's annual research study into desirable destination and product attributes as perceived by potential visitors, as well as destination performance and brand-health relative to competitors provides strategic planning insight.</p>
<p>v. Undertake increasingly detailed study into target market segmentation and supply capacities and potential.</p>	<p>✓</p>		<p>This is included in the ongoing annual research study as well as in the frequent consultations within the source markets with travel trade representatives which ultimately target the development and implementation of initiatives targeting the further growth of different markets, including niche segments.</p>
<p>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.</p>	<p>✓</p>		<p>Research obtained from the annual research study feeds into STA's marketing planning process. Important information about brand health and performance against desirable attributes (as perceived by potential visitors) and competitor destinations to name a few provide the basis for destination positioning, branding and subsequently activity planning.</p> <p>STA maintains a suite of promotional collateral for both trade and consumer. Media and trade partners are fully briefed about destination positioning including unique selling points.</p>
<p>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.</p>	<p>✓</p>		<p>STA's annual marketing plan utilises multiple channels including digital, television, radio, print and press to target a range of target markets and niche segments. All elements are integrated and consistent with the identified strategic positioning elements and target improved awareness and interest levels, visitation.</p> <p>STA's marketing plan is multi-pronged and covers direct marketing, travel trade activity, international media and public relations, events and meetings and partnerships.</p>
<p>viii. Develop and produce promotional collateral support materials including niche product/ niche market brochures, interpretative materials, DVD, etc.</p>	<p>✓</p>		<p>STA maintains a comprehensive range of promotional tools for both the travel trade and consumers, including general</p>

			holiday and leisure and niche-market brochures, travel agent training DVD, posters, pull-up banners, carry bags and others.
ix. Maintain a targeted familiarisation management program.	✓		STA's ongoing trade familiarisation program targeting retail travel agents and annual Samoa Tourism Exchange/Faa Samoa Roadshow targeting product/contracting/marketing managers from Samoa's tour wholesaler partners (new and existing) continues to provide a valuable opportunity for the travel trade to experience the destination first-hand.
x. Continue in-market representation in Australia and New Zealand. Seek contractual representative arrangements in secondary markets particularly North America.	✓		STA has in-market representation in New Zealand, Australia and UK/Europe and strategic alliances with affiliate partners in North America, China and Korea.
xi. Proactively manage a visiting journalist program (target and respond to visiting journalists) and produce a media kit for distribution to visiting journalists.	✓		STA's established International Media Visit Program targets influential travel writers, bloggers, photo-journalists from selected source markets and media agencies and media visit requests are assessed and evaluated accordingly by the Marketing team with the assistance of its PR network.
xii. Develop strategy to promote Samoa as a great movie film location.	✓		Government through STA had partnered with a well-known global reality TV program. This partnership resulted in the in-country production of multiple seasons of the popular 'Survivor' show. Samoa holds the record for the most-number of 'Survivor' seasons filmed on-location and as a result of the Production Company's positive overall experience in Samoa, it advocates Samoa as a 'model' film location. Through the International Media Visit Program, there are ongoing partnerships with New Zealand and Australia TV productions including Masterchef UK & NZ. Also, negotiations continue with an international production-agency for the filming of international foreign movies.
xiii. Develop natural disaster tourism communications and media recovery plan and ensure formal channels of communication are established between all relevant disaster management	✓		STA's post-disaster communications program has been put to use on two occasions during 2009-2012. The first was

<p>agencies which ensure that correct and accurate information is being quickly communicated to visitors and potential visitors.</p>			<p>following the 2009 Tsunami and the second was in 2012 following Cyclone Evan. The extent of the program varies in accordance with the impact of each natural disaster but the general aim is to ensure the travel trade and media are kept informed.</p> <p>When and where appropriate, post-disaster marketing communications seek to highlight the destinations readiness to host visitors and encourage visitation.</p>
<p>xiv. Develop and implement detailed targeted sports tourism strategy and promotional campaign.</p>	✓		<p>STA works in partnership with specific sporting bodies to capitalise on the presence and participation of Samoa teams at certain events with a global following, to highlight Samoa's sporting attributes, talents and state of the art facilities.</p> <p>And as part of efforts to further promote sports tourism, STA works with sports tour wholesalers in source markets to target sports and tour groups.</p>
<p>xv. Develop and implement detailed targeted education tourism strategy and promotional campaign.</p>	✓		<p>STA maintains close and ongoing communication both electronically and in-person via workshops and forums, with industry stakeholders on a range of matters relation to policy, marketing and promotions, planning and development and research and statistics.</p>
<p>xvi. Build VFR specific strategies e.g. "2012 – Samoa Homecoming Year" themed campaign with an appropriate calendar of supporting events.</p>	✓		<p>The 'Celebrate Samoa' theme was developed and implemented and promoted in-alignment with Samoa's 50th Anniversary. Whilst the Anniversary was during June 2012, STA promoted the theme over a 16-month period and highlighted the range of events which took place during September 2011 to December 2012. The promotions targeted a variety of audiences including VFR.</p>
<p>xvii. Develop and implement other niche market segment (e.g. surfing, special interest) marketing and promotion strategies and campaigns.</p>	✓		<p>STA has developed partnerships with established niche-market tour operators, media partners and event developers to highlight Samoa's offering in relation to specialist activities and events including fishing, surfing, outrigger and</p>

			music festivals. Samoan Culinary will be promoted consistently throughout the years through the introduction of the Samoa Cook Book by renown global award winning chef Robert Oliver and STA will take delivery of this new promotional tool in late 2013. The same book will be available in Random House associated book stores
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.	✓		STA has in place a Brand Ambassador program in UK/Europe involving Samoan Celebrity Chef Monica Galetti who judges the UK Masterchef Professionals TV Show. STA also continues to work with Sports Personality and Agent Lauaki Fereti Tuilagi. Chief Tauasa Sielu Avea has become a known figure in Hawaii for his entertaining Samoan and Polynesian cultural shows and STA has engaged Sielu Enterprises and Alii Tours to promote and sell tours to Samoa from mainland USA and travel sales network. Further opportunities are being investigated.
xix. Investigate potential to establish “iconic” experiences such as “edge of the world” events, great surf, great walks, great bike rides and others.	✓		As part of the Samoa brand guide, emphasis is placed on the presentation of the unique Samoan offering in relation to the most sought-after (destination/holiday) attributes as perceived by potential visitors. The STA continues to support niche events as to create positive images of a destination that has a range of experiential products that a premier in all range of activities whether it be multisports utilising the state of the arts facilities and our pristine natural environment or immersion in the Samoan culture in feature events in Samoa or in iconic tours that boasts of the love of the late Robert Louis Stevenson for Samoa as his home. All are based on the experiential products that STA promotes as most tourism experts know that products are tangible, services are intangible but experiences are memorable. STA therefore promotes the faaSamoa experience which is a range of images and expressions that describe the look

			<p>and feel of the destination as most branding exercises endeavour to emanate in the identification and differentiation of Samoa as a tourist destination.</p> <p>Partnership development targeting the establishment of must-experience events (including musical and sporting) in Samoa is a key focus area going forward.</p>
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Product, service and infrastructure development			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
i. Finalise and implement the standards and rating system which STA has developed.	✓		The revision of accommodation standards involved updating relevant criteria following the Samoa Tourism Exchange forum in October 2009. The aim was to have the standards in place to help rebuilding of tourism accommodations affected by the tsunami. The revised guidelines were reprinted in December 2009. Hard and electronic copies were distributed to the industry and continue to be distributed upon request.
ii. Implement and promote standards and rating scheme. Implement aspirational accreditation scheme.	✓		The Tourism Accommodation Standards Committee was re-established in early 2010. Priority was to encourage the participation of industry members through compliance with the established Minimum Standards Guidelines. This was also promoted as part of the Build Back Better principles of the Tourism Tsunami Rebuilding Programme (TTRP) from 2010-2012. Human Resource constraints impacted the implementation of the programme in FY 10 -11 and FY 11-12 which resulted in the delay of the FY09-10 Inspections Report and the inability of the P&D Division to conduct inspections for the FY-10-11. Despite the challenges, the division had utilised the information from the TTRP Monitoring Inspections while information for remaining properties were collected during the Annual STA Product Update. These issues have now been resolved with additional staff approved for the division.

		<table border="1" data-bbox="1266 289 1820 581"> <thead> <tr> <th>Year FY</th> <th># of Tourist Accommodations</th> <th>Compliance Rate (%)</th> </tr> </thead> <tbody> <tr> <td>2009/2010</td> <td>80 (tsunami affected operators not included)</td> <td>99%</td> </tr> <tr> <td>2010/2011</td> <td>114 (based on STA Product Update & TTRP Monitoring Inspections)</td> <td>88%</td> </tr> <tr> <td>2011/2012</td> <td>126</td> <td>95%</td> </tr> </tbody> </table> <p data-bbox="1266 630 1820 722">Desktop research has been done by STA for a suitable Rating System for Samoa as previously proposed in 2005. The Qualmark System in New Zealand is a potential option for Samoa.</p> <p data-bbox="1266 771 1820 933">With the impact of Cyclone Evan, the priority now is to rebuild the affected properties to pre-cyclone capacity and to better standards. The Review which will determine a Rating System for Samoa will be funded under the Samoa Tourism Support Programme during the First Year of the Programme (Nov 2013-June2014)</p>	Year FY	# of Tourist Accommodations	Compliance Rate (%)	2009/2010	80 (tsunami affected operators not included)	99%	2010/2011	114 (based on STA Product Update & TTRP Monitoring Inspections)	88%	2011/2012	126	95%
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<p>iii. Gear product development and marketing towards selective higher end of markets. Distinguish Samoa as a “special” destination, not a “me too” destination.</p>	✓	<p data-bbox="1266 950 1820 1006">Formal investment in the sector continues to promote higher end accommodation and niche products for holiday travel.</p> <p data-bbox="1266 1023 1820 1247">Destination marketing highlights Samoa's unique attributes and encourages experience. It is evident that Samoa continues to seek products and services that can cater to the higher end of the markets which are the most popular for most tourism source markets and this includes STA's participation of investment promotions for first class/five star accommodation properties which will ensure premier destination status.</p>												
<p>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.</p>	✓	<p data-bbox="1266 1263 1820 1349">STA continues to play a facilitation role for large scale potential tourism projects. Foreign Investment hotel developments in the first class or the five star rating are promoted for establishment in</p>												

		<p>Samoa., STA was able to establish contact with the Lamana Group from PNG which is holding its ground breaking on June 8th 2013. Other projects which are awaiting confirmation of its commencement date includes the Warwick Hotel in Vavau, and the second phase of Tanoa Tusitala. The Return to Paradise Resort of 55 rooms inclusive of beachfront villas will open on the 01st of November 2013 and the Saletoga thereafter.</p> <p>Incentives are available online via the MCIL website.</p>
<p>v. Develop policies and initiatives which support the development of tourism in communities and ensure that the benefits of tourism are equitably spread.</p>	<p>✓</p>	<p>Summary of Initiatives:</p> <ul style="list-style-type: none"> • Marketing and promotional activities through multiple channels • Trainings and capacity building (tour guiding, customer service, business planning, surf life saving) • National Tourism Climate Change Strategy for Samoa • Accommodation Standards Inspections • Attraction Site Upgrading • Support for marketing applications under the Private Sector Support Facility • Government for Savaii Samoa Tourism Association Office at Mulifanua • Tourism Tsunami Rebuilding Programme (TTRP) • Tourism Cyclone Recovery Programme (TCRP) • Tourism Component – National Adaptation Programme of Action • Enhancing the resilience of tourism reliant communities • Facilitation of infrastructural support
<p>vi. Undertake investigation of feasibility of developing a Cultural Centre attraction as a showcase and cultural keeping Place of Samoan culture and heritage.</p>	<p>✓</p>	<p>The STA Board in 2009 had approved the transformation of the existing STA Fale to a Cultural Centre. The STA Cultural Village is built with a vision of transforming this facility to a fully operational</p>

			Cultural Centre. Programmes for cruise ship tours and on request tours are currently being implemented at the Centre which provides a series of cultural displays including umu demonstration, tattooing, weaving, elei printing and traditional healing.
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.	✓		The Planning & Urban Management Act 2004, elements of nature based/eco – tourism developments which are central requirements in the Environmental Impact Assessment as well as the Preliminary Environmental Assessment Report for all Development Consent applications.
viii. Regulate, publish, advertise and display attraction entrance charges. <u>Work with community leaders to enhance understanding of importance of consistency and compliance.</u>		✓	STA continues to play an advisory role in terms of entry fees/charges. All are advised through periodic inspections to have fees displayed on signboards to avoid visitor complaints or inconsistencies in prices charged. STA will progress consultations in the next TDP timeframe in accordance with the Tourism Development Act 2012 regulations.
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.			STA continues to promote this niche-activity in selected source markets through direct marketing and media visit initiatives in-partnership with the local golf clubs and the golf travel trade specialists in the development of holiday packages which incorporate golf.
x. Implement tourism development area strategies and updated development checklists.		✓	Delayed due to the lack of resources. The LDCF GEF - NAPA 5 Project fund the development of TDA Management Plans.
xi. Identify possible sites, for boutique 'wilderness retreat' style resort accommodation and prepare promotional concept profile.	✓		Identified Solaua as one of the potential sites and a project profile was put together and showcased at the Samoa Investment Conference in Auckland 2012. With the recent launch of the Tourism Investment Portal by SPTO under its EU Pacific Regional Capacity Building Programme, STA will work with MCIL in identifying more investment proposals for showcasing.
xii. Facilitate training of guides and interpreters and the development of commercial guiding services.	✓		Refresher courses in tour guiding as well as a Natural History Tour

			<p>Guiding Training in Savaii were funded by STA for industry members. Tour Guide Manuals are being updated, printed and are to be released in 2013 to ensure ongoing awareness and training.</p> <p>Commercial guiding services cannot be developed given demand limitations. Existing tour excursion companies are sufficient to service the market.</p>
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.		✓	<p>An array of sports-related event opportunities and partnerships, which highlight Samoa natural environment (e.g. Samoa Swim Series, Samoa Half Ironman Challenge), have been developed and will be further enhanced based on experience and participant feedback.</p>
xiv. Investigate opportunities for land based activities and develop as products available for visitors.		✓	<p>New land based attractions such as caves, bush and river walks, and hiking have been developed over the last five years. Potentials for developing adventurous activities continue to be discussed and will rely on major investment.</p>
xv. Investigate opportunities for National Park Development and world heritage listing where appropriate.		✓	<p>Of equal importance, efforts of MNRE and SPREP have been rewarded with the official recognition of Lake Lanoto'o National Park as a Ramsar Site in January 2013. This is a global official recognition of Lake Lanoto'o as a wetland of international importance.</p>
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.		✓	<p>Product development research and training for private sector continued to be funded and supported under the PSSF. Major marketing opportunities accessed by providers include the</p> <ul style="list-style-type: none"> ○ Shanghai World Exposition 2010 ○ Yeosu Expo in Korea 2012 ○ the establishment of the samoashopping.com website by STA ensures that tourists who wish to buy artifacts and samoa products as well as the samoan communities overseas can buy directly from the producer/artisans thereby promoting the arts and crafts

<p>xvii. Examine opportunities in consequence of the planned convention centre.</p>	<p>✓</p>	<p>Opportunities to highlight Samoa's array of MICE (Meetings, Incentives, Conferences and Exhibitions) products and services, have been developed and implemented. These include close working partnerships with hotels offering conferencing facilities including several in the Apia urban area, meeting and conference coordinators and managers based in source-markets, presence at MICE events (such as PAICE in NZ and AIME in Australia) and advertisements in specialist media. The potential of MICE (meetings, incentives, conferences and exhibitions) is promising for Samoa and is been given more focus due to the majority of accommodation properties established in Apia.</p>
<p>xviii. Actively participate in combating wild dog problem through the NBC and other forums.</p>	<p>✓</p>	<p>Canine Control Bill was developed through the STA Governance and Planning Project Legislation was tabled in Parliament in early 2013 NBC continues to implement awareness programmes to advise the public of the issue and STA continues to advocate for the appropriate resource and capacities to assist the Ministry of Police and Prisons and APS to administer the newly passed Canine Control Act 2013. It is important that Samoa addresses the dog problem in order to alleviate the country's affected reputation that is synonymous with the dog attacks on pedestrians by family/domesticated dogs.</p>
<p>xix. Develop "tastes of Samoa" cuisine and educate business owners as to the significance of food as part of the visitors overall "Samoa" experience</p>	<p>✓</p>	<p>A number of cuisine-related partnership efforts which aim to highlight Samoa's culinary offerings and incorporate it as part of the overall visitor experience involving celebrity personalities Robert Oliver, Monica Galetti and Simon Gault have been developed and will continue to promote Samoa in Random House affiliated bookstores and television. It is also timely with the introduction of top tasting restaurants by Samoa's popular local chefs.</p>
<p>xx. Install good general and tourism specific directional road signage throughout Samoa.</p>	<p>✓</p>	<p>LTA's focus has been on traffic signage mainly in Apia where traffic is heavy STA continues to lead the installation of village signs including key</p>

			directional signs at intersections for the information of visitors and in sync with the STA free tourist map.
xxi. Regulate taxi industry to ensure fair charges and to facilitate continuing upgrade of services to international visitor requirements and expectations.	✓		Taxi industry is regulated by LTA and taxi fares are established and readily available for public information. STA continues to lead awareness campaigns against overcharging by taxi drivers which remains one of the main complaints by visitors aside from the unkempt and wild dogs
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.	✓		Work in progress. Existing tracks require ongoing maintenance. Projects such as the IWRM and others have confirmed support for the enhancement of protection of these resources. A fee system has not yet been discussed mainly due to the state of sites and monitoring issues which also requires resources.
xxiii. Install warning signage in relation to potentially dangerous currents and other hazards at beaches and other land attractions where appropriate.	✓		All beach front accommodations are required as part of the standards to install warnings where appropriate. Some accommodations have signage
xxiv. Continue with "meet and greet" program and stalls for cruise ships	✓		STA maintains an ongoing 'meet and greet' and farewell friends program for all visiting cruise ships docking at the Port of Apia and all international flight arrivals at Faleolo International Airport. These range from cultural groups performing traditional songs and dances, fire-knife spectacles and string-guitar bands. STA presently chairs the Samoa Sea Cruise Working Group which was established in response to a Cabinet resolution. The Group is made up of stakeholder representatives from the National Tourism Office, Port Authority, Shipping Agents, Shore Excursion Providers and Taxi Association. It looks at and discusses a number of matters relating to safety, security, services and experiences.
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		✓	The Samoa Port Authority organises an open dock-side market for artisans and craft-men and women to display and sell their wares (when cruise ships are in port). In addition, the Samoa Tourism Authority provides either on-the-dock or on-board Visitor Information Services, while Banks and Samoa Post provide banking and postal and philatelic services.

xxvi. Develop options for cruise ship passengers to access southern coast direct from cruise ship.		✓	Deferred due to resource constraints. From time to time, cruise ships call into Siumu and Fagamalo will provide anchoring services to facilitate access.
xxvii. Improve capacities for managing people with special needs on the public transport vessels and across the full spectrum of Samoan public areas.	✓		Improvement noted especially in Lady Samoa III and as well as pedestrian access in Apia.

Resource Management			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
i. Adopt, implement, establish monitoring systems and processes and report against Samoa's sustainable tourism indicators. Interpret results and determine appropriate strategic responses.	✓		STA had approached the Global Sustainable Tourism Council in late 2012 for Samoa's registration as a member of GSTC. The process was delayed due to Cyclone Evan. As part of the Environmental Standards, the National Adaption Plan of Action 4 – Tourism Component will fund Samoa's registration to the Early Adopters Programme under the GSTC. Samoa has gained membership and the early adopters programme will be undertaken in the latter half of 2013. The programme will review the destination's sustainable indicators as originally established in the late 1990s.
ii. Environmental impact assessment to be considered in relation to all developments for any purpose.	✓		EIAs are required in the Development Consent Application process for all major tourism developments and this is ongoing through close partnership with the MNRE Planning & Urban Management Agency.
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.	✓		Nationwide awareness and education programmes have been implemented mainly through television, radio, direct mail, and ongoing advisory, inspections and disaster recovery programmes such as the Tourism Tsunami Rebuilding Programme (TTRP) and the Tourism Cyclone Rebuilding Programme (TCRP).
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.	✓		Key sites have been prioritised through the Attraction Site Upgrading Project currently being funded by the Government with Technical Advice from the Australian Eco Tourism Volunteer based at STA. Key sites include To Sua Giant Swimming Hole, Papaseea Sliding Rocks, Saleaula Lava Field, Mt. Matavanu, Taga Blowholes and Afu Aau Waterfall. Database is now in place and interpretive signage will be installed at the end of June 2013.
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.	✓		The NAPA 5 – LDCF GEF Climate Change Projects implementation have factored in the investigation of tourism opportunities in Marine

			Protected Areas. With funding signed on 29 th May 2013, implementation is foreseen to commence in early June 2013. The Early Adopter's Programme under the GSTC will provide further support.
vi. Continue clean up campaigns and maintain the National Beautification program. Constantly reinforce 'Keep Samoa Clean' themes.	✓		Implemented and Ongoing through the work of the National Beautification Committee. Three (3) annual national clean ups are held every year and lead by the public sector. One is held before Independence and one before Teuila Festival week and the other before Christmas. The NBC has been vigorous in its beautification awareness campaign which has now been supported by the Ministry of Women, Community and Social Development through its Aiga ma Nuu Manuia awareness campaign where they are now responsible for the annual competition.
vii. Work with Village Councils to establish appropriate 'behavioural protocols' and supporting signage and strengthen awareness programs for visitors.	✓		Ongoing awareness programmes implemented via television, radio and liaison with village communities. In addition, tourism operators continue to advise visitors and guests of cultural protocols through briefing sessions upon check-in and when on tour. The Jasons Visitors Guide and Map, STA website www.samoa.travel as well as Information Brochures on Samoa also provide important information on cultural protocols for the information of visitors.
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.	✓		A Dispute Committee chaired by the STA CEO is established within STA to coordinate investigations on visitor complaints received by the Authority. The Police Commissioner and Minister of Police provide a support role to provide timely responses before visitors depart Samoa.
ix. Samoa Police to establish Tourism Liaison Unit / Officers to enable better understanding of and response to tourism issues.	✓		Support from the Ministry of Police and Prisons (MPP) through the allocation of case officers have helped in past cases. Plans are underway to expand the Dispute Committee to include the Commissioner and relevant unit from the Ministry as well as the Attorney General's Office.
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.	✓		Water saving technologies and having alternative water supply systems are requirements of the Samoa Tourism Accommodation

			Standards. This has also been factored into the employee training DVD which has been funded under the NAPA 4 Tourism Climate Change Project.
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Access			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
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.	✓		STA has an ongoing partnership and channel of communication with SAA and MWTI/CAA, targeting route development and improved airport experience for users including international visitors.
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.	✓		STA has very good relationships with all international airlines operating into Samoa and regularly engages in discussions relating to inbound seat capacity, frequency, forward bookings, tourism development and new route development. Samoa has a direct flight to Honolulu and discussions to expand connections to LA are ongoing with the inbound and other interested airlines.
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).	✓		STA has partnerships with specialists in China which have the ability and network to develop charter flights to Samoa but before that can happen Samoa needs to establish preferred accommodation that are conducive to market needs
iv. Encourage tourism operators to package air/land deals.	✓		Tour Operators in selected source markets and within Samoa provide or offer a myriad of services which can be packaged to combine value-added deals. The offerings are still minimum when compared to other matured destinations.
v. Continue Cruise ship working group.	✓		STA presently chairs the Samoa Sea Cruise Working Group which also includes Samoa Port Authority, Shipping Agents, Shore Excursion Providers and Taxi Operators Association. The Group was established in response to a Cabinet resolution, to promote Samoa as a cruise destination as well as matters relating to cruise shipping including security, safety, services and experiences to name a few.
vi. Undertake review of competitiveness of all Government charges, taxes and other imposts e.g. landing charges etc.		✓	On hold due to resource constraints. With the Airport Sector Plan

			now in place, STA and the industry will investigate opportunities as feasibility study for route development.
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.		✓	Samoa being a low emitter, and its isolation from the markets are factors which have at this stage delayed discussions on this strategy. Flights to Samoa are already expensive and therefore additional taxes will potentially discourage travels from long haul markets.
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.	✓		This is ongoing and in-partnership with the Samoa Airport Authority and MWTI/CAA.
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.	✓		As part of the rebranding of Virgin Blue and Polynesian Blue to Virgin Australia and Virgin Samoa, the airline has forged new alliances with other airlines which have subsequently expanded the airline's route network and in some cases improved connectivity, especially from Europe via Abu Dhabi in the Middle East.
x. Re-open Fagalii airport to be operated by Polynesian Airlines in better serving the American Samoa route.	✓		Fagalii Airport re-opened in mid 2009. It is there where Polynesian Airlines operates all its services to/from Pago Pago. Samoa Air, since its launch in 2012, also operates to Pago Pago from Fagalii. The carrier also operates domestic services to Maota and Asau on Savaii.

Tourism capacity building and workforce development			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
i. Engage the existing educational institutions to launch, reinforce and continue tourism related courses including 'Train the trainer' programs.	✓		Ongoing partnerships between the Authority and the main tourism educational providers NUS and APTC continue to enhance the standard of tourism courses available but also train the trainer programmes. NUS IOT Tourism Lecturers are supported through the NUS partnership with Otago University whilst STA is supporting further studies for some at NUS. APTC through its Natioanlisation Programme have recruited Samoan tutors for all its programmes including tourism and hospitality. SBEC continues to provide train the short term train the trainer courses for tourism operators.
ii. Support existing training programs and initiatives to introduce 'gap filling' courses and on the job courses tailored to the needs of specific properties.	✓		Industry trainings in the area of tour guiding, business planning, customer service, natural history tour guiding, water safety, First Aid, CPR, Disaster Management, Economic Impact Assessment, Surf Survival and Surf Rescue have been facilitated by STA under its annual budget with the exception of business planning & customer service which were funded by NZAP. Opportunities for industry trainings through SHA were also implemented over the years through the SICTP and EU. Some of these courses include internet marketing, food and beverage, customer service and business planning.
iii. Examine and implement mechanisms for incentives to employers that enable their staff to participate in training programs.	✓		As a result of stakeholder consultations when the Samoa Tourism Workforce Development Plan was developed in 2010, these issues were discussed and resolutions include: <ul style="list-style-type: none"> • Implementing training programmes in regions to reduce travel time and expenses and encourage participation • STA funded trainings were free of charge, whereas some industry trainings coordinated by SHA required payment of minimal fees
iv. Educate operators on the benefits of packaging e.g. Air, air/land, accommodation, activities, Upolu with Savai'i extensions and vice versa.	✓		Ongoing discussions at the annual Samoa Tourism Exchange Buyer – Seller Events and Industry Forums provided opportunities

			for businesses to discuss packaging deals with wholesalers.
v. Develop "How To" guides and support tools and materials.	✓		<p>A Step by Step Guide for Tourism Operators on how to start a new tourism business was developed in 2008 to help new comers into the industry in planning their businesses. The Guide is available in both English and Samoan.</p> <p>The Samoa Tourism Support Programme currently in its Inception Year is funding the review/update of the Tour Guide, Beach Fare and Attraction Site Owners Manuals for dissemination to the industry. Copies will also be available for new operators.</p>
vi. Establish higher level tour guide training capacities, tour guiding interpretative materials and tour guiding accreditation structures.	✓		<p>Tour Guiding courses are available at NUS and APTC. The Workforce Development Component of the STSP will potentially consider short term industry training should it identify tour guiding training as one of the priority areas for training.</p>
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.	✓		<p>The Authority has identified Saleaula Lava Field as one example of a well managed, successful community tourism project in Samoa. Through the Awareness and Education Programme, STA will support the current interpretive signage project which is due to complete at the end of June, through a short documentary on Saleaula Lava Field.</p>
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.	✓		<p>Villages in Tourism Development Areas have experienced collaboration with resorts and hotels through entertainment but also through economic activities such as selling of produce and handicrafts, fish and other commodities to the resorts and hotels.</p>
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.	✓		<p>Train the trainer content are factored into all short term industry trainings provided. Owners and operators are also encouraged to participate in the hope that they can help train staff given obvious turnover issues in the sector. Under the STSP, it is hoped that five priority training areas will have full modules designed which will include train the trainer components for sustainability.</p>
x. Provide business advice for tourism businesses including accounting and book-keeping, marketing, assistance in writing business plans and undertaking feasibility studies.	✓		<p>Business Planning and Business Management trainings implemented included components on accounting, book-keeping, marketing and feasibility studies in terms of conducting SWOT</p>

			Analysis of the business/project. SBEC continues to be the main training provider for Business Planning for the sector.
xi. 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.	✓		The Samoa Chamber of Commerce continues to provide its business mentoring scheme for members. STA also provides ongoing business advisory services to tourism operators.
xii. Facilitate training providers to provide short workshop-based training and manuals.	✓		Manuals for short term industry trainings have been developed by training providers and are in place. SQA currently is in the process of accrediting providers and establishing standards for short term courses in the tourism sector.
xiii. Continue tourism awareness programs.	✓		Implemented and ongoing via television, radio (FM, 2AP and Kingdom)
xiv. Examine opportunities and mechanisms for better and more use of overseas study tours, scholarships and internships.	✓		Some industry members attended the study tour of China in 2012. The PSSF supported SHA with its recent study tour of Fiji as a component of its series of EU funded trainings. STSP will also fund planned study tours over the five years of the programme.

Land, business and investment			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
i. Prepare and require compliance with minimum standards as a requirement for business licensing of tourism businesses.	✓		Implemented and ongoing through close collaboration with the Ministry for Revenue. All tourism businesses applying for business licenses are required to obtain a support letter from STA to confirm its compliance with the Tourism Accommodation Standards.
ii. In accordance with legislation, establish an aspirational accreditation program that confers “preferred” “Accredited Tourism Operator” status to operators achieving accredited standards.		✓	The Accreditation Process has been deferred until the review of the current standards is completed. The STSP will fund the review in the First Year of the Programme. The Authority has however considered options and processes for this to be done.
iii. Link investment incentives to requirement of Investor human resource and skills development plans.	✓		Major tourism projects which go through the Investment Committee have human resource plans incorporated into their development plans. Where there are skill gaps, resorts are recruiting from the region or internationally.
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.	✓		The Tourism Investment Working Group which comprises of STA, MNRE Land Management Division, AG, MCIL and STEC is the focal point now for resolving land issues pertaining to tourism developments.
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.		✓	There is no need to review the current investment incentives as the process and system has effectively addressed investors’ needs as evident by the establishment of assisted projects Return to Paradise and the planned launch of the Lamana project on June 8 th 2013.
vi. Identify possible tourism development sites from land held by Samoa Land Corporation. Consolidate with investor management processes.	✓		Assessed during the consultations of the TDP 2009-2013. Majority of SLC land are not on prime tourism locations.
vii. 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. 	✓		A detail State of Play Assessment on Tourism Investment was conducted by IFC in 2010. This project was not finalised and IFC has again confirmed interest. Project is planned for the FY 2013-2014.
viii. Develop ‘pre-packaged’ template business structures and models which have pre considered and developed mechanisms that appropriately manage the issues and concerns.		✓	This activity is put on hold due to the need to first develop and Investment Attraction Programme.

ix. Develop Average length of stay (“ALOS”) yield specific strategies and educate and encourage industry operators as appropriate.	✓		The annual Samoa Tourism Exchange Forums in 2011 and 2012 had discussed ALOS strategies through the development of Business Calendars for the Year and focusing on identifying activities to attract visitors to their businesses during the Off Peak Season.
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Research, planning and impact management			
KEY ACTION ITEMS	ACHIEVED	DELAYED	PROGRESS DESCRIPTION
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.	✓		Recruitment of staff to assist with the work of the Division. Ongoing work in collecting visitor arrival information and tourism earnings from the relevant sources and reporting to the stakeholders through the newsletter and other means
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.	✓		Establish a Survey Committee comprising of SBS, CBS, SPA, SAA and STA to oversee the collection of data from some of the major research activities. Also obtaining of information from the industry is included in the Tourism Development Act 2012 (TDA 2012)
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.	✓		Attraction sites surveys and Occupancy and Forward bookings surveys on a monthly basis monitoring the progress of the industry from time to time.
iv. Undertake visitor survey during July 2009 to June 2010 and thereafter every alternative year. Review and redesign questionnaire to encompass all required intelligence.	✓		Currently underway with the enumeration period to be completed by end of July 2013. Full report is intended to be ready by end of 2013
v. Draw upon in market consumer research undertaken by organisations like PATA and SPTO, and others.	✓		Currently utilizing information from PATA's mPower and SPTO newsletter from time to time reporting on regional updates and other relevant information
vi. Analyse results, and develop strategies from, the Samoa Ports Authority questionnaire that was circulated to all cruise ship principals in late 2008.		✓	Results of this survey was not communicated to STA and the sector. A cruise shipping survey is planned to be conducted by STA through funding from STSP to provide information on cruise ship arrivals and yield.
vii. To monitor, and report against, Samoa's sustainable tourism indicators.	✓		The sector through its annual programmes has contributed to the achievement of the Sustainable Tourism Indicators. Through the NAPA 4, Samoa will for the first time acquire the Early Adopter's

			Recognition after its registration. This programme will strengthen Samoa's performance in sustainable tourism.
viii. Identify tourism assets and natural heritage attractions, and assess feasibility of bringing these assets to economically viable and marketable form.	✓		Monthly attraction sites survey obtaining information on monthly visits to each sites. These information will inform the Attraction Site Upgrading Programme currently implemented by the Authority in collaboration with the site/resource owners.
ix. Ongoing monitoring of national and international industry trends and market performance.	✓		Ongoing monitoring of trends utilizing information from the industry, such as, room stock, occupancy and forward bookings as well as information from international organizations like PATA and SPTO to determine regional and international trends
x. Design and implementation of a tourism forecasting models with specific focus directed towards forecast regional accommodation and infrastructural needs		✓	Delayed due to resource constraints
xi. Assessment of economic, social and environmental impacts of tourism.		✓	Delayed due to resources constraints however, it is currently included in the current STSP program
xii. Establishment of a research library, and dissemination of information.	✓		Ongoing updates on industry performance in terms of the Newsletter as well as all the information are available from the Division upon request.
xiii. Investigate the possibility of setting up a tourism satellite accounting system for Samoa.		✓	Awaiting completion of IVS and Economic Impact Assessment before this can be investigated and assessed

<i>Institutions and industry framework</i>			
<i>KEY ACTION ITEMS</i>	<i>ACHIEVED</i>	<i>DELAYED</i>	<i>PROGRESS DESCRIPTION</i>
i. Enact and implement proposed Tourism legislation prepared in accordance with the Legislative review.	✓		Tourism Development legislation was endorsed by Parliament in 2012. Relevant regulations and awareness campaigns will be developed and implemented for enforcement.
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.	✓		STA's involvement in related programmes at the national level including the National Investment Committee, Private Sector Support Facility, environmental programmes and through the work of the following Ministries: MNRE, MCIL, MoF, MoR, FESA, MPP, MWTI, AG, MFAT, SWA, LTA, EPC, SPA, SSC, SBC, CBS, DBS, and MOH
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.	✓		STA has been working together with the main industry associations SHA and SSTA over the last five years. The annual Samoa Tourism Exchange Industry Forum has further strengthened communication with the sector. Plans are in the pipeline to establish a Samoa Tourism Industry Alliance which will meet periodically to discuss tourism related issues. The following Technical Working Groups which have private sector representation have been used in the last five years to progress various projects for the sector. <ul style="list-style-type: none"> • Tourism Sector Steering Committee • Tourism Marketing Taskforce • Tourism Training Taskforce • Samoa Tourism Accommodation Standards Committee • Tourism Climate Change Taskforce • Survey Committee • Samoa Sea Cruise Working Group • National Beautification Committee • Tourism Tsunami Rebuilding Programme Facilitation and Steering Group • Tourism Cyclone Recovery Programme Facilitation

			Group and Sub Committee
iv. Continually maintain contact with and monitor development partner programs.	✓		<p>The tourism sector has over the last over years been well supported by the following development partners;</p> <ul style="list-style-type: none"> • NZAP • AusAid • EU • UNDP • Commonwealth Secretariat • LDCF GEF • USAID • GIZ
v. Instigate a monthly electronic newsletter to industry members.	✓		<p>STA has a periodic electronic Tourism Circular and an Industry Electronic Direct Mail (edm) to regularly inform the industry on tourism related issues.</p>

ANNEX B – Logical Framework

STSP Goals	STSP Sector Outcomes	STSP Sub-sector Outcomes	STSP Programmes	STSP Outputs by 2019
<i>Coordinated and effective destination marketing</i>	<i>Growing Demand and yield for tourism products</i>	<p><i>Increase in visitor arrivals by 5 per cent pa</i></p> <p><i>Increase in holiday market by 7 percent pa</i></p> <p><i>Extend the average length of stay to 11 days</i></p> <p><i>Reduce seasonality of visitation to 46 percent visit in first six months</i></p> <p><i>Increase pre-trip destination information and in country visitor information levels to 'very satisfied'</i></p>	Destination Marketing and Research	<p>1.1 STA Five Year Strategy and Annual Marketing Program Implemented</p> <p>1.2 Annual Industry Marketing Forums to review and develop Annual Program</p> <p>1.3 Tourism statistics published quarterly</p> <p>1.4 Biennial visitor and economic impact surveys undertaken</p>
<i>To provide an enabling environment to support growth and investment in tourism related businesses</i>	<i>Increased tourism investment and profitability</i>	<p><i>Increase in number of rooms supply and quality levels</i></p> <p><i>Increase in tourism sector investment levels from domestic and international investors</i></p> <p><i>Increase in level of employment within the sector</i></p>	Investment and Enabling Environment	<p>2.1 Implementation of the MTC sector Plan enabling environment reforms</p> <p>2.2 Implementation of MTC Sector Plan investment recommendations</p> <p>2.3 Improved internet coverage and speeds for tourism operators</p> <p>2.4 Review utility charges to tourism operators</p> <p>2.5 Tourism Investment Strategy developed and implemented</p> <p>2.6 Finalization of land statute amendments resulting from review of land law</p> <p>2.7 Establish land dispute arbitration system</p> <p>2.8 Implement Tourism Linkages programme for handicrafts, primary producers and tourism providers</p>

STSP Goals	STSP Sector Outcomes	STSP Sub-sector Outcomes	STSP Programmes	STSP Outputs by 2019
				<p>2.9 Support development of Samoan Cuisine in restaurants</p> <p>2.10 Review and implement formal structure of tourism investment incentives</p>
<p>Support product improvement and product development to meet market expectations</p>	<p>Higher quality tourism products and experiences</p>	<p>Increase in average daily expenditure to \$SAT335</p> <p>Ninety five percent of operators have on line booking facility</p> <p>Full compliance with Tourism Quality Standards sub-program</p> <p>Increased visitation and activities at key attractions</p> <p>Improved visitor satisfaction with key attractions and increased</p> <p>Increase in number of protected marine and land based attractions</p> <p>Disaster Risk Management Plans established for all accommodation properties</p> <p>Canine control program implemented and reduction in tourist complaints</p> <p>Increased satisfaction levels and expenditure by cruise ship visitors</p>	<p>Product Development</p>	<p>3.1 Implement training and enhancements to market access and product distribution for operators</p> <p>3.2 Implement revised Tourism Quality Standards sub-program including sustainability and DRM component</p> <p>3.3 Implement tourism training and business support service sub-program</p> <p>3.4 Upgrade priority attraction, support through Trails development and develop new activity based products</p> <p>3.5 Implement a Canine Control Programme</p> <p>3.6 Undertake Annual Monitoring and Review of Sustainability Indicators under GSTC Early Adopter Programme</p> <p>3.7 Strengthen tourism linkages through 'farm to table' cuisine tourism program</p> <p>3.8 Develop group public liability insurance scheme for tourism industry operators</p>

STSP Goals	STSP Sector Outcomes	STSP Sub-sector Outcomes	STSP Programmes	STSP Outputs by 2019
<p><i>Provide education which supports industry and community needs</i></p>	<p>Improved workforce skills and service delivery</p>	<p><i>Annual workplace Training Calendar developed and delivered</i></p> <p><i>50 percent of communities included in Village Awareness program</i></p> <p><i>Business mentoring, e-marketing and business advice available to all operators by 2016</i></p> <p><i>Dedicated NUS training facility developed</i></p> <p><i>STA Capacity Building Plan developed and implemented</i></p> <p><i>Tourism included as a compulsory subject in the secondary school curriculum</i></p> <p><i>Feasibility of NUS tourism facility on Savaii completed</i></p> <p><i>Scholarships programme for NUS tourism and hospitality students expanded</i></p> <p><i>Revised Samoa Tourism Workforce Development Plan developed</i></p>	<p>HRD and Training</p>	<p><i>4.1 Provide increased workplace training opportunities and deliver Annual Tourism Industry Workplace Training Calendar</i></p> <p><i>4.2 Provide additional business mentoring support for tourism operators</i></p> <p><i>4.3 Implement broad community tourism awareness programme</i></p> <p><i>4.4 Develop a dedicated tourism training facility at NUS</i></p> <p><i>4.5 Develop additional workplace training modules and training manuals</i></p> <p><i>4.6 Develop tourism private sector e-marketing capacity through mentoring and business support program</i></p> <p><i>4.7 Develop and implement a capacity building plan for STA staff and management</i></p> <p><i>4.8 Introduce tourism as a compulsory subject in secondary education</i></p> <p><i>4.9 Undertake a feasibility on establishing a dedicated NUS tourism and hospitality facility on Savaii</i></p> <p><i>4.10 Expand the current scholarships programme for NUS students in tourism and hospitality</i></p> <p><i>4.11 Revise and update the Samoa Tourism Workforce Development Plan 2010 – 2012</i></p>

STSP Goals	STSP Sector Outcomes	STSP Sub-sector Outcomes	STSP Programmes	STSP Outputs by 2019
<p>Improve access, infrastructure use and maintenance</p>	<p>Improved access and destination competitiveness</p>	<p>Medium term NISP priorities completed including energy sector regulatory reform</p> <p>Development and implementation of Tourism Plans for Upolu and Savaii</p> <p>Design plan and phased implementation of Waterfront Redevelopment</p> <p>Flight schedules from Australia and New Zealand revised</p> <p>Bilateral air service agreements reviewed to facilitate additional services</p> <p>Develop donor subsidies to support renewable energy adoption by tourism operators</p> <p>Support improved internet access and speed through IT Sector Development Plan</p> <p>Improved Ferry Services – signage, on line booking system and passenger handling system</p>	<p>Transport and Infrastructure Access</p>	<p>5.1 Continue implementation of the medium term infrastructure priorities under the NISP in the areas of Energy, telecoms, Water, Solid Waste, Roads, Ports, Airports and multi sector projects</p> <p>5.2 Develop Tourism Plans for Upolu and Savaii</p> <p>5.3 Finalize scope and costing for Apia Waterfront redevelopment</p> <p>5.4 Negotiate flight schedule improvements to Australia and New Zealand</p> <p>5.5 Implement regulatory reform in the energy sector and remove regulatory function from EPC</p> <p>5.6 Further review options and bilateral air services agreements to facilitate additional trans-Pacific air services</p> <p>5.5 Support regional initiatives to better synchronize air schedules to improve connectivity</p> <p>5.6 Support the adoption of renewable energy by tourism operators and negotiate donor subsidies to facilitate adoption</p> <p>5.7 Facilitate improved internet coverage and speed for all tourism operators through the IT Sector Development Plan recommendations</p> <p>5.8 Improve the ferry service through better signage, passenger handling and on line booking system</p>

ANNEX C – Action Plans

- **Marketing and Research**
- **Product Development**
- **Transport Infrastructure and Access**
- **Investment and Business Enabling Environment**
- **HRD and Training**

STSP – Action Plan – Marketing and Research Programme

Strategy: To grow demand and yield for the destination and its' tourism products				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
HIGH PRIORITY RECOMMENDATIONS				
Resource and implement the Samoa Five Year Marketing Strategy through an STA Annual Marketing Plan including:	<ul style="list-style-type: none"> • Building and further developing the current brand to differentiate Samoa in key source markets including: • Tailoring of destinational campaigns around key goals • Implementation of marketing tools to improve visitor experience • Targeted and segmented digital and social media marketing activities • Building global networks to grow developing markets • Increase product distribution through traditional and online channels • Provide marketing support to improve air access • Further development of the MICE and special events markets 	STA	\$7,500,000 p a.	High
Implementation of market development projects as outlined in the Marketing Strategy	<ul style="list-style-type: none"> • Image library content 	STA	\$100,000	High
	<ul style="list-style-type: none"> • Refreshing TVCs and other video footage 	STA	\$200,000	High
	<ul style="list-style-type: none"> • Development and roll out of Discover Samoa Card 	STA	\$50,000	High
	<ul style="list-style-type: none"> • Development of Software Apps 	STA	\$100,000	High
	<ul style="list-style-type: none"> • Further development of Samoa Direct Online e-marketing hub and channel management 	STA	\$150,000	High
	<ul style="list-style-type: none"> • Foreign website translation and hosting 	STA	\$150,000	High

Strategy: To grow demand and yield for the destination and its' tourism products				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
	<ul style="list-style-type: none"> Facilitate improvements to Visitor Information Services in Samoa and the content of the STA destinational website and online marketing 	STA	\$150,000	High
SUB TOTAL – Marketing – High Priority			\$ 26,900,000	
Implementation of market research and statistics programme including:				
	<ul style="list-style-type: none"> A rolling program of trade and consumer research in key source markets 	STA	\$250,000 p.a.	High
	<ul style="list-style-type: none"> Biennial IVS and Economic Impact Study 	STA	\$250,000 pa	High
	<ul style="list-style-type: none"> Biennial Cruise Ship Survey 	STA	\$ 50,000 every 2 years	High
	<ul style="list-style-type: none"> Annual Accommodation Occupancy Survey 	STA	\$ 50,000 pa	High
	<ul style="list-style-type: none"> Continue the compilation of statistics based on the visitor arrival and departure statistics and provide quarterly updates to industry and stakeholders 	STA/NSO	\$ 200,000 pa	High
Hold twice yearly to Industry Marketing Forums and Monitor Implementation of Marketing Strategy	<ul style="list-style-type: none"> Organise Annual Forum Present review and discuss Annual Marketing Plans Present review and discuss Annual progress Report on STSP Monitor the effectiveness of the major annual activities and marketing program through the KPIs developed in the Five Year Marketing Strategy 	STA/Industry	\$ 60,000 pa	High
SUB TOTAL - Marketing Research and Statistics – High Priority			\$ 3,925,000	
TOTAL – Marketing and Research – High Priority			\$ 30,825,000	

STSP – Action Plan – Product Development

Strategy: To support product improvements and new product development to meet market expectations				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
HIGH PRIORITY RECOMMENDATIONS				
Continue to take a comprehensive approach to product development initiatives Implement through the implementation of the following activities under and Integrated Samoa Product Development Program:	Market Access and Product Distribution			High
	<ul style="list-style-type: none"> Facilitate online and digital marketing training for industry operators 	STA/SHA/SSTA	Budgeted under HRD	High
Quality Standards	<ul style="list-style-type: none"> Continue to encourage improvements to operator standards and service levels through the TCRP. 	STA/SHA/DBS	Already budgeted under TCRP	High
	<ul style="list-style-type: none"> Implement revised Tourism Quality Standards Program (TQSP) to cover core tourism products in: <ul style="list-style-type: none"> Accommodation Attractions Restaurants and Cafes Taxis and Transport 	STA	\$650,000	High
	<ul style="list-style-type: none"> Further develop the current Accommodation Standards Program to incorporate Grading/Accommodation Classification 	STA	Budgeted under the TQSP above	
Upgrade priority attractions sites through	<ul style="list-style-type: none"> Signage improvements <ul style="list-style-type: none"> Directional signage's Interpretive signage's Safety signage's Developing reference map Minor infrastructure upgrades 	STA, MNRE DEC, SPREP	\$2,100,000	High

Strategy: To support product improvements and new product development to meet market expectations				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
	<ul style="list-style-type: none"> Develop new niche market trails including cycling and walking 	STA/industry	\$2,000,000	High
	<ul style="list-style-type: none"> On line information content 	STA/MNRE/Operators	\$200,000	High
	<ul style="list-style-type: none"> Training for site managers and staff: <ul style="list-style-type: none"> Tour Guiding Interpretive Safety First Aid & CPR 	STA	Budgeted under HRD – Annual Training Calendar	High
	<ul style="list-style-type: none"> Development of the Discover Samoa card 	STA	Budgeted under Marketing and Research	High
	<ul style="list-style-type: none"> Improve site management through STA awareness and training and entrance fee monitoring Promote Ecotourism through awareness programs to community based attraction sites 	STA	Budgeted under Community Awareness	High
Resource and implement a Canine Control and management program	<ul style="list-style-type: none"> Develop management and canine control program 	MoPP	Budget TBC	High
Promote Disaster Risk Management and Climate Resilience by:	<ul style="list-style-type: none"> Incorporate sustainability measures into the Samoa TQSP 	STA	Budgeted under TQSP	High
	<ul style="list-style-type: none"> Ensure sustainable site planning and climate change adaptation through effective development control and EIA approvals process for new developments 	PUMA/MNRE	Budgeted under agency recurrent budgets	High
	<ul style="list-style-type: none"> Incorporate safety standards relating to disaster risk management into operator guidelines and TQSP 	STA	Budgeted under TQSP	High
Training and Business Support Services	<ul style="list-style-type: none"> Develop and deliver an Annual Training 	STA	Budgeted under	High

Strategy: To support product improvements and new product development to meet market expectations				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
	Calendar of workplace based training modules which facilitates on-site learning in areas of priority training need and link to Accommodation Standards and Accreditation programs.		HRD and Training	
Further develop linkages between primary producers and tourism by:	<ul style="list-style-type: none"> Menu enhancement and training for local kitchen staff in local recipes 	STA		High
	<ul style="list-style-type: none"> Support through WIBDI for primary producers targeting goals in the supply chain 	WIBDI	Budgeted under Business Enabling Environment	High
	<ul style="list-style-type: none"> Increased promotion of local cuisine through destination marketing 	STA	Budgeted under Marketing	High
Access to Finance	<ul style="list-style-type: none"> Increase the take up rate of TCRP funds by review of criteria for training and support funds 	STA	TCRP funding	High
	<ul style="list-style-type: none"> Lobby commercial banks for reduction in interest rates and implement enabling environment recommendations to reduce bank risk 	MoF/MCIL/CBS	Budgeted in MTC Sector Plan	High
Total – Product Development High Priority			\$ 4,950,000	

STSP – Action Plan –Transport, Infrastructure and Access

Strategy: To increase destination competitiveness through increased accessibility, infrastructure use and maintenance				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
HIGH PRIORITY RECOMMENDATIONS				
Finalise the scope and cost of the Apia waterfront redevelopment, including phasing	<ul style="list-style-type: none"> Undertake detailed design and feasibility for proposed upgrading and phasing of development 	PUMA	\$500,000 – design stage only – other costings TBA	High
Negotiate for improvements to scheduled flight timings from major markets	<ul style="list-style-type: none"> Negotiate improved scheduled and provide marketing support for revised schedules 	STA	\$150,000 Marketing support budgeted in Marketing	High
Further review the options and multi-lateral air services agreements to facilitate additional trans-Pacific services including extension of Hawaiian Air Services or additional Fiji Air services	<ul style="list-style-type: none"> Review options and potential business case and cost benefits of supporting additional trans Pacific air services Conduct negotiations with carriers based on outcomes of business case modelling 	STA	\$250,000 for business case modelling and negotiations only	High
Support the regional initiatives in relation to synchronising of regional air schedules to improve connectivity and a common open skies agreement within the region	<ul style="list-style-type: none"> Liaise with SPTO to ensure Samoa is a priority in rescheduling and regional air service initiatives 	STA	\$ 250,000	High
Facilitate improved internet coverage, cost and speed for all tourism operators through the IT Sector Development Plan priority recommendations	<ul style="list-style-type: none"> Implement improvements as identified in the IT Sector Plan 	MCIT/World Bank	Budgeted in IT Sector Plan/World Bank	High
Improve the ferry passenger services for tourists through improved signage, passenger handling, on line booking system and monitoring customer feedback	<ul style="list-style-type: none"> Undertaken feasibility on booking system and implement Design and improve passenger handling system including training and signage 	SSC	\$ 100,000	High
Total – Infrastructure/Access High Priority			\$ 1,350,000 # excludes Waterfront redevelopment	

Strategy: To increase destination competitiveness through increased accessibility, infrastructure use and maintenance				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
MEDIUM PRIORITY RECOMMENDATIONS				
Continue with the implementation of the medium term infrastructure priorities established through the NISP	<ul style="list-style-type: none"> Implementation of NISP recommendations 	MWTI	Budgeted under NISP	Medium
Develop Tourism Plans for Upolu and Savaii	<ul style="list-style-type: none"> Development of Destinalional development Plans including infrastructure and product development plans 	STA	\$ 200,000	Medium
Implement the required regulatory reforms in the energy sector to facilitate private sector providers and remove regulation function from EPC	<ul style="list-style-type: none"> Conduct regulatory review and develop and implement roadmap for amendments 	MWTI	Budgeted in NISP	Medium
Support the adoption of renewable energy by tourism operators and negotiate donor subsidies to facilitate adoption	<ul style="list-style-type: none"> Establish viability of RE subsidised scheme for tourism operators Implement RE scheme based on feasibility assessment and demand 	STA/MoF	\$ 3,000,000	Medium
Total - Infrastructure /Access Medium Priority			\$ 3,200,000	

STSP – Action Plan – Investment and Business Enabling Environment

Strategy: To provide an enabling environment to support growth and investment in tourism related business				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
HIGH PRIORITY RECOMMENDATIONS				
Improve internet coverage and speeds for tourism operators through negotiation with service providers	<ul style="list-style-type: none"> Work in collaboration/negotiate with service providers Improve internet infrastructure access 	MIT/Service Providers/World Bank	Budgeted in WB Programme	High
MEDIUM PRIORITY RECOMMENDATIONS				
Improve the enabling environment by	<ul style="list-style-type: none"> Undertaking a Review of the Companies 	MCL	Budgeted in MTC	Medium

Strategy: To provide an enabling environment to support growth and investment in tourism related business				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
implementing the identified recommendations from the MTC Sector Plan including:	Act		Sector Plan	
	<ul style="list-style-type: none"> Development of on-line business registration system 	MCIL	Budgeted in MTC Sector Plan	Medium
Improve the general investment climate by implementing the MTC Sector Plan investment related recommendations including:		MCIL	Budgeted in MTC Sector Plan	Medium
	<ul style="list-style-type: none"> Finalisation of the review of the Foreign Investment Act and preparation of an institutional plan to ensure the effective administration of the restricted activities list for foreign investors. Establishment of a country credit risk rating through internationally recognized ratings agencies Enact and implement the Personal Property Security Act Develop E commerce regulations Develop and implement a Competition Law and policy Review Fair Trading Act and develop regulations Finalise the Labour Law Review 	MCIL	Budgeted in MTC Sector Plan	Medium
Review utility charges for tourism operators including the wastewater treatment surcharge fee and electricity charges for accommodation provides.	<ul style="list-style-type: none"> Discuss with SWA & EPC the possibility of reviewing the utility charges for new investments/accommodation providers 	Lead: STA Support: SWA, EPC	\$ 50,000	Medium
Develop and implement a Tourism Investment Strategy including:		Lead: STA and MCIL	\$650,000	Medium
	<ul style="list-style-type: none"> Develop a tourism specific investment scheme based on the STSP proposal 			

Strategy: To provide an enabling environment to support growth and investment in tourism related business				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
	<ul style="list-style-type: none"> Identify and create profiles for potential major tourism investment opportunities Market profiles to pre-selected investors Develop documented procedures/criteria/guidelines for the screening authenticity/legitimacy of potential investors Establish a Tourism Investment Unit within STA and secure budget for this Unit to facilitate all investment projects 			
Finalise the amendments to land statutes resulting from the review of land law which is with the Attorney General's Office.	<ul style="list-style-type: none"> Finalise legislative amendments and endorse through Cabinet and Parliament 	AG	TBC	Medium
Establish a system of arbitration and mediation for land disputes to facilitate early settlement.	<ul style="list-style-type: none"> Establish Arbitration and mediation system and mechanism 	AG	TBC	Medium
Increase linkages between primary producers, handicrafts and tourism providers through business support and facilitation by lead agencies including WIBDI and STA.	<ul style="list-style-type: none"> Improve links between primary producers and tourism providers Liaise with agricultural sector Promote/Encourage Samoan cuisine for hotels and tourism operations 	STA, SBEC	\$600,000	Medium
Total – Investment and BEE Medium Priority			\$ 1,300,000	

STSP – Action Plan – HRD and Training

Strategy: To provide education and training which supports industry and community needs				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
HIGH PRIORITY RECOMMENDATIONS				
Develop and implement an Annual Tourism Industry Training Calendar which linked the Industry Quality Standards Program	<ul style="list-style-type: none"> Annual tourism training calendar developed and made available on the STA Corporate Website Annual delivery of priority workplace training program Revival of the Industry Advisory Panel to ensure that courses are reviewed and aligned to industry needs. 	Lead: STA, Support: TTT, APTC, NUS, SBEC, SCOC, SQA, SHA, SSTA	\$500,000 pa	High
Increase the level and intensity of e-marketing training for operators through short courses and hands on training supported by mentoring and business support.	<ul style="list-style-type: none"> Development through enhancing on-line access and usage, an ongoing program as part of a broader Integrated Tourism Product Development Program Provide e marketing TA for 3 year period to build operator capacity 	Lead Agency – Training Providers (APTC, Chamber of Commerce) STA – Facilitation Role	\$ 200,000 pa	High
Develop a Capacity Building Plan for STA staff and management highlighting individual training needs and competencies	<ul style="list-style-type: none"> Conduct TNA for STA staff to identify training needs Thorough analysis of training requirements Develop and implement the Capacity Building Plan for STA Staff and Management 	STA	\$ 150,000 pa for implementation	High
Implement broad based tourism community awareness program	<ul style="list-style-type: none"> Conduct annual community consultations and workshop program supported by media campaigns 	STA	\$150,000 pa	High
Total – HRD and Training High Priority			\$ 5,000,000	

Strategy: To provide education and training which supports industry and community needs					
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority	
MEDIUM PRIORITY RECOMMENDATIONS					
Develop workplace training modules in priority areas for operators and increase workplace training delivery on site	<ul style="list-style-type: none"> • Modules to be developed and trainings will be provided to local training providers to facilitate capacity development. • Capacity building for local training providers will also be undertaken as part of the development of the training modules 	Lead: STA, Support: TTT, APTC, NUS, SBEC, SCOC, SQA, SHA, SSTA	\$200,000	Medium	
Improve the tourism and hospitality training facilities at NUS by developing a dedicated training center with model bedrooms and reservations center	<ul style="list-style-type: none"> • .Develop the designated computer rooms and facilities to improve the reservation area of learning for the students. • Scaling up the level of NUS T&H scholarships to encourage the entry level training as well as increasing level of workplace training available 	NUS	\$800,000	Medium	
Increase linkages with overseas institutions and agencies to facilitate short term attachments of key staff, trainers and officials.	<ul style="list-style-type: none"> • Maintain linkages with existing institutions and explore new opportunities • Continue working together with overseas training providers to strengthen qualification for local students and tutors • Revival of the Industry Advisory Panel to ensure that courses are reviewed and aligned to industry needs 	STA, NUS, APTC	\$ 50,000 pa	Medium	
Increase the number of scholarships available for tourism and hospitality through donor programs.	<ul style="list-style-type: none"> • Increase funding for scholarships programme 	STA, NUS	\$ 300,000 pa	Medium	

Strategy: To provide education and training which supports industry and community needs				
Recommendation	Key Actions	Responsibility	Indicative Budget (SAT)	Priority
Incorporate the content of the revised Manuals (Beach Fales, Attractions and Tour Guiding) into the Workplace Training modules and Annual Training Calendar.	<ul style="list-style-type: none"> TA to incorporate the content during the review of T&H courses Ensure Manuals are practised on a regular basis 	STA, NUS	\$ 50,000 pa	Medium
Strengthen tourism curriculum as a compulsory subject into the primary and secondary education system.	<ul style="list-style-type: none"> MESC to review tourism curriculum Tourism to ensure effective understanding of its significance 	MESC	\$650,000	Medium
Undertake a feasibility study on the demand for establishing a dedicated NUS tourism and hospitality training facility on Savaii.	<ul style="list-style-type: none"> Undertake industry consultations indicating the need to develop a branch of tourism in Savaii. 	NUS	\$75,000	Medium
Revise and update the Samoa Workforce Development Plan 2010 - 2012	<ul style="list-style-type: none"> Changes to reflect changing supply and demand factors and training needs and gaps, as well as the wide range of training opportunities and available course. 	TTT	\$75,000	Medium
Total – HRD and Training Medium Priority			\$ 2,800,000	

ANNEX D – Mid Term Expenditure Framework

ANNEX E - Monitoring and Evaluation Framework

ANNEX F - Potential Technical Assistance for the next five years

Programme	Activity	Expenditure	2014/15	2015/16	2016/17	2017/18	2018/19
Marketing and Research	Resource and implement the Samoa Five Year Marketing Strategy through an STA Annual Marketing Plan	<i>Recurrent</i>	7,500,000	7,500,000	7,500,000	7,500,000	7,500,000
		<i>Development</i>	1,200,000	1,000,000	1,000,000	1,000,000	1,000,000
	Implementation of annual rolling programme of research and statistics	<i>Recurrent</i>	570,000	570,000	570,000	570,000	570,000
		<i>Development</i>	500,000	500,000	500,000	500,000	500,000
	Hold twice yearly Industry Marketing Forums on Annual Marketing Plan review	<i>Recurrent</i>	35,000	35,000	35,000	35,000	35,000
		<i>Development</i>	25,000	25,000	25,000	25,000	25,000
Investment and Business Enabling	Implementation of MTC Sector Plan enabling environment reforms	<i>Recurrent</i>	Budgeted under MTC Sector Plan				
		<i>Development</i>					
	Implementation of MTC Sector Plan Investment recommendations	<i>Recurrent</i>	Budgeted under MTC Sector Plan				
		<i>Development</i>					
	Review and reduce utility charges for tourism operators	<i>Recurrent</i>			50,000		
		<i>Development</i>					
	Develop and implement Tourism Investment Strategy	<i>Recurrent</i>			100,000	100,000	100,000
		<i>Development</i>			150,000	100,000	100,000
Finalise land statute	<i>Recurrent</i>	TBC					
	<i>Development</i>						

	amendments resulting from review of land law						
	Establish land dispute arbitration system	<i>Recurrent</i>	TBC				
		<i>Development</i>					
	Review and implement formal structure of tourism investment incentives	<i>Recurrent</i>			100,000	100,000	100,000
		<i>Development</i>			120,000		

Programme/Activity	Action	Expenditure	2014/15	2015/16	2016/17	2017/18	2018/19
Product Development	Implement revised Tourism Quality Standards sub-program including sustainability and DRM components	<i>Recurrent</i>	300,000	300,000	300,000	300,000	300,000
		<i>Development</i>	200,000	150,000	100,000		
	Implement widely accessible tourism enterprise training, mentoring and business support sub-program	<i>Recurrent</i>	200,000	200,000	200,000	200,000	200,000
		<i>Development</i>	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
	Upgrade priority attractions and support through Trails development and development of additional activity based products	<i>Recurrent</i>	300,000	300,000	300,000	300,000	300,000
		<i>Development</i>	2,000,000	1,500,000	400,000		
	Implement a national Canine Control Programme	<i>Recurrent</i>	200,000	200,000	200,000	200,000	200,000
		<i>Development</i>	2,500,000				
	Undertake annual monitoring and review of sustainability indicators under GSTC Early Adopter Programme	<i>Recurrent</i>					
		<i>Development</i>			100,000	100,000	100,000
	Strengthen tourism linkages through 'farm to table' Samoan tourism cuisine programme	<i>Recurrent</i>					
		<i>Development</i>			200,000	200,000	200,000
	Develop group public liability insurance for tourism industry operators	<i>Recurrent</i>	120,000				
		<i>Development</i>					

Programme/Activity	Action	Expenditure	2014/15	2015/16	2016/17	2017/18	2018/19
HRD and Training	Provide increased workplace training opportunities and deliver Annual Tourism Industry Workplace Training Calendar	<i>Recurrent</i>			200,000	200,000	200,000
		<i>Development</i>	500,000	500,000	500,000	500,000	500,000
	Implement broad based community tourism awareness program	<i>Recurrent</i>	200,000	200,000	200,000	200,000	200,000
		<i>Development</i>					
	Develop a dedicated tourism training facility at NUS and strengthen capacity	<i>Recurrent</i>					
		<i>Development</i>			50,000	75,000	75,000
	Develop additional workplace training modules and training manuals	<i>Recurrent</i>		50,000	50,000	50,000	50,000
		<i>Development</i>					
	Develop private sector e-marketing capacity through mentoring and business support program	<i>Recurrent</i>	100,000	100,000	100,000	100,000	100,000
		<i>Development</i>	500,000	500,000	500,000	100,000	100,000
	Develop and implement a capacity building plan for STA staff/management	<i>Recurrent</i>	100,000	100,000	100,000	100,000	100,000
		<i>Development</i>	150,000	100,000	100,000	100,000	100,000
	Introduce tourism as a compulsory subject in secondary education	<i>Recurrent</i>			50,000	50,000	50,000
		<i>Development</i>			250,000	250,000	
	Undertake a feasibility on establishing a NUS tourism facility on Savaii	<i>Recurrent</i>					
		<i>Development</i>				75,000	
Expand the NUS scholarships program	<i>Recurrent</i>			200,000	200,000	200,000	
	<i>Development</i>			100,000	100,000	100,000	
Revise and update the Samoa Tourism Workforce Development Plan	<i>Recurrent</i>						
	<i>Development</i>			75,000			

Programme/Activity	Action	Expenditure	2014/15	2015/16	2016/17	2017/18	2018/19
Transport Infrastructure and Access	Continue implementation of NISP priorities	<i>Recurrent</i>	NISP Budget				
		<i>Development</i>					
	Develop Tourism Development Plans for Upolu and Savaii	<i>Recurrent</i>					
		<i>Development</i>				100,000	100,000
	Finalize scope, design and costing for Apia Waterfront improvements and implement staged redevelopment	<i>Recurrent</i>	250,000				
		<i>Development</i>	250,000				
	Negotiate flight schedule improvements to Australia and new Zealand	<i>Recurrent</i>	130,000	130,000	130,000	130,000	130,000
		<i>Development</i>					
	Implement regulatory reform to the energy sector and remove regulatory function from EPC	<i>Recurrent</i>	NISP Budget				
		<i>Development</i>					
	Further review options and multilateral air service agreements to facilitate additional trans-Pacific air services	<i>Recurrent</i>	150,000	150,000	150,000	150,000	150,000
		<i>Development</i>					
	Support regional initiatives to better synchronise air schedules to improve airline connectivity	<i>Recurrent</i>	50,000	50,000	50,000	50,000	50,000
		<i>Development</i>					
	Support adoption of renewable energy by tourism operators and negotiate donor subsidies to facilitate adoption	<i>Recurrent</i>			100,000	100,000	100,000
		<i>Development</i>			500,000	500,000	500,000
Facilitate improved internet coverage, cost and speed for all tourism operators through the IT Sector Development Plan recommendations	<i>Recurrent</i>	Budgeted in IT SDP					
	<i>Development</i>	Budgeted in IT SDP					
Improve the ferry services through better signage, passenger handling and on line booking system	<i>Recurrent</i>	200,000	100,000	100,000			
	<i>Development</i>	100,000	100,000	100,000			

ANNEX E – Monitoring and Evaluation Framework

STRATEGIC GOAL AREA	INDICATOR DESCRIPTOR	METHODOLOGY/DATA SOURCES	DESIRED OUTCOME	2012/3 BASELINE	2019 TARGET	TARGET RATE OF GROWTH
Tourism Expenditure and Employment	Average daily visitor expenditure	International visitor survey	Increase the average daily expenditure per visitor by 39ST /day	296 ST\$	335STS/day	2.5% growth
	Economic importance of tourism	Economic Impact Study	Increase the economic value of tourism to the Samoan economy	20% GDP	>\$SAT 550 Million	6% per annum
	Number of full time jobs in tourism	Labour market survey Economic Impact Study	Increase the number of those employed full time in the workforce through tourism by an additional 1,700 jobs	5,000	6,700 Jobs	6% per annum
Market Size and Composition	Visitor length of stay (nights)	Arrival cards/IVS	Extend the average length of stay for all visitors to 11 nights	10.4 nights	11 nights	N/A
	Number of visitor arrivals	Arrival cards	Increase the total number of arrivals	126,700	162,000	5% per annum
	Percentage of holiday visitors	Arrival cards	Increase the holiday market by 7 percent per annum over the next five years	46,500	65,000	7% per annum
	Number of nights in destination	Arrival cards/IVS	Extend the average length of stay for all visitors	10.4 nights	11 nights	N/A
	Number of cruise ship passenger disembarkations	Port authority and Shipping Agents	Increase the number of cruise ship passengers that disembark ships	16,439 (2012) pax only	22,000	To be developed
	Average spending per cruise ship passenger	Cruise ship visitor survey	Accurate information on cruise ship visitor average expenditure	\$US100/SPA	\$US110	10% higher than baseline
	Percentage of Total Visitor arrivals from Jan to June	Arrival cards	Reduce the seasonal impacts of tourism	44% (2011)	46%	
Tourism Product Quality	Average occupancy level in commercial accommodation	Accommodation survey	Improve utilization of current accommodation stock		60%	
	Number of attraction sites upgraded	STA planning records	Increase community revenues from natural and cultural attractions.	10	20 sites	10%
	Number of accommodations using quality standards program	STA planning records	Increase quality of tourism products	85%	100%	15%
	Number km cycling & walking	STA planning records	Increase amount of cycling and walking products	4	8	50%

	routes		available			
	Percentage of operators with online booking	Accommodation survey	Improve signage nationally	45%	95%	50%
Visitor Satisfaction	Visitor satisfaction levels	International visitor survey	Increase overall visitor satisfaction rating	4.5	5	
	Visitor rating of pre-trip information	International visitor survey	Increase visitor rating of pre-trip information and visitor information in Samoa	3.5 out of 5	5 out of 5	N/A
	Visitor rating of cultural activities	International visitor survey	Increase the level of visitor satisfaction for cultural activities	3.5 out of 5	5 out of 5	N/A
Community Engagement	Resident satisfaction levels (with tourism)	Resident survey	Increase community revenues from natural and cultural attractions.	N/A	4.5	N/A
	Lending ST\$ to small tourism businesses	Bank records	Increase lending for small locally owned businesses	N/A	TBD	TBD
	Local product revenue	Economic Impact Assessment	Increase the consumption of local primary produce by tourism related businesses	N/A	TBD	SAT\$ 4 million per annum
	Number of communities receiving awareness courses	STA training records	Increase community engagement and understanding of the opportunities tourism affords	N/A	50	10 per annum
Environmental Sustainability	Number of protected marine and land-based attractions	STA planning records	Increase protections of resources	N/A	TBD	TBD
	Indicator scorecard	STA planning records	Improvement in sustainability indicator scores over time	N/A	N/A	N/A
	Number of operators with environmental certification	Accommodation survey	Increases sustainability of tourism enterprises	N/A	TBD	TBD
	Number of times indicators are monitored	STA planning records	Introduce and monitor additional tourism sustainable indicators in line with GSTC Destination Criteria	1	10	Twice each year

ANNEX F :Technical Assistance Requirements

	TA Required	Duration
1.	<p>Marketing Division</p> <ul style="list-style-type: none"> Cruise Shipping Strategy - to develop a strategy for the sector that can aid achieve the target of 30 ships as in SDS 	Short-term
2.	<p>Policy Sector Coordination Division</p> <ul style="list-style-type: none"> Legal Tourism Advisor - familiar with the Tourism Development Act 2012 from which regulations could be established to support the legislation as per the application of the ACT in Part 2 and Sections 3 and 4 and Part 8 and 9. Online/Digital TA Reviewing current technologies (booking engine, corporate website etc) and recommending better ways and reviewing industry pricing and better improvements in lowering costs. 	<p>Short-term</p> <p>Short-term</p>
3.	<p>Research and Statistics Division</p> <ul style="list-style-type: none"> Identified the need to have a software (similar to SPSS) that the team can use to speed up the analysis of all the surveys ensuring also that we have ample data information to build a Tourism Satellite Account. TA will train the team of how to use the system/software. TSA - Tourism Satellite Account TA 	<p>Short-term</p> <p>Long Term</p>
4.	<p>Planning and Development Division</p> <ul style="list-style-type: none"> Tourism Business, Standards and Accreditation TA Tourism Niche Products strategy TA - (cycling, diving, surfing, hiking) Tourism Investment TA - researches and consults with relevant key players to have in place a system 'one stop shop' for all potential investors (both local and international) 	Short-term
5.	<p>TA - Human Resource Management Information System.</p> <p>Ensure that information can be made readily available and produce effective information for performance appraisals. Look at the training needs that must be developed for the staff</p>	Short-term