



indicator handbook

**a guide to the development and use of
Samoa's sustainable tourism indicators**



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**Monitoring
Sustainable
Tourism
Development
in Samoa**

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*Samoa Visitors Bureau and the South Pacific Regional Environment Facility
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ABOUT THE AUTHOR

Louise Twining-Ward is a tourism researcher and advisor from the United Kingdom who has been living and working in Samoa for six years. Her work has included preparation of the Samoa Tourism Development Plan, 2002-2006, facilitating tourism industry workshops, providing tourism advisory services, writing community training manuals and conducting research in a wide variety of areas including tourism education and training, participation techniques and sustainable tourism development and planning.

The handbook summarises the lessons learnt from her research on the development of sustainable tourism indicators in Samoa. Together with the Samoa Visitors Bureau (SVB) and a multi-disciplinary advisory committee, she established a set of practical and user-friendly indicators for monitoring sustainable tourism development in the country, and put in place an implementation framework to facilitate the interpretation of indicator results. Data from the first year of monitoring has already been put into use to design a sustainable tourism action plan that targets ten specific areas of tourism in Samoa.

This Handbook is primarily designed as a functional tool to assist SVB in the use and monitoring of the indicators, but it includes step-by-step guidelines for indicator development that may also be of interest to other small island countries, wanting to design their own indicators of sustainable tourism development. The project clearly demonstrates how monitoring not only assists by providing information for decision-making, but can also help in the design and management of sustainable tourism action strategies.

Louise Twining-Ward

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A very special thank you also goes to the Project Advisory Committee (PAC), a 12-member team of experienced individuals from government, tourism, private sector, tertiary educational establishments and civil society organisations. It is the first time that a multi-disciplinary team has been called in to assist with an SVB research project, and the success of the project is, to a large degree, due to the dedication and enthusiasm of members of this voluntary committee. Throughout the project they provided expertise and advice in their field of experience, ensuring the project kept on target and supporting the author/facilitator in both a professional and personal capacity, for which she is enormously grateful. The project advisory committee was comprised of the following members:

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François Martel	Fiu Mataese Elisara-Laulu
Dr John Stunnenberg and Greg Tilley	Tapulolou Siuli Tuaillemafua
Louise Twining-Ward	Fetogi Vaai

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FOREWORD

Samoa has seen its tourism industry develop and become one of the country's most significant economic activities. Particularly over the past six years, tourism has demonstrated its ability to yield substantial foreign exchange and employment benefits within the service sector as well as in other related domestic industries.

As in many other Pacific Island countries, Samoa's natural features; its lush tropical vegetation, the waterfalls, rugged volcanic interior and palm-fringed beaches are central to its attraction for tourists. But what makes Samoa stand out from other countries in the region is its traditional culture, as manifested in the village architecture, traditional customs, dress, language, ceremonies and the legendary hospitality of its people. To ensure that these precious assets are nurtured and sustained, the Government of Samoa is determined that the tourism sector in Samoa will be well planned and managed, focusing on the development needs of the country, and protective of the quality of the natural and cultural resource base on which the industry and the country depends. In essence, Samoa is planning for the sustainable development of its tourism sector.

The *Indicator Handbook* represents an important contribution to this goal. What has been achieved, in a practical sense, is the identification of specific goals and indicators for sustainable tourism, not in the language of international organisations but in the culturally-specific context of Samoa. The result is a user-friendly guide that will not only enable Samoa to monitor its progress in terms of sustainable tourism, but also help raise awareness of the issues to be addressed in the context of future tourism development in Samoa.

I wish to congratulate the Samoa Visitors Bureau and their Project Advisory Committee for this work. The *Indicator Handbook* has turned sustainable tourism from a hazy concept into something tangible, concrete and achievable in the context of Samoa. The challenge now is to put the indicators to the test. I strongly support the efforts of the Samoa Visitors Bureau in this undertaking, hoping that Samoa may set an example for other countries in the region to follow.

Honourable Tuala Sale Tagaloa
Minister of Tourism



PREFACE

The New Zealand Official Development Assistance Programme (or NZODA as it is more commonly known), has, over the last two decades, been an active partner in the development of tourism in Samoa. The objective of the programme is to “support and assist with the development of tourism in Samoa”. This support and assistance has taken a variety of forms; research, product development, education and training, marketing assistance, planning and development and other forms of technical support.

From the start of our involvement in Samoa, the NZODA Programme has been based on the simple concept that the success of the tourism industry in Samoa should not be judged solely by the numbers of visitors and revenues generated, but by the sense of harmony tourism achieves with the society, culture, and environment of Samoa. The concept was to ensure that tourism would be seen not as spoiling the environment, or as devaluing Samoan culture, but rather as a means of strengthening and enhancing both the environment and the faaSamoa.

In this way, NZODA welcomed the sustainable tourism indicator initiative set up by the Samoa Visitors Bureau, and was pleased to be able to support it. This *Indicator Handbook* represents an important step towards sustainability. It is a practical tool that sets goals and targets, shows how these will be monitored over time and suggests a number of concrete action tasks that can help the tourism sector in Samoa become more sustainable.

Although the focus of the *Indicator Handbook* is on the development and use of sustainable tourism indicators, it is clear that many of the observations and findings of the project, will find broader use in tourism planning, policy-making, education and awareness. One important area where the project has already begun to make an impact is in raising the awareness of a wide range of stakeholders of the issues connected with sustainable tourism. The next step will be to turn this awareness into action, so that the long-term sustainability of tourism in Samoa is secured for generations to come.

The New Zealand High Commission is pleased to be associated with this project. I wish the Samoa Visitors Bureau every success in the future monitoring and implementation of Samoa’s Sustainable Tourism Indicators.

His Excellency Mac Price
New Zealand High Commissioner



PREAMBLE

Because of the Pacific's perceived romantic isolation from the rest of the world, the abundance of natural flora and fauna as well as cultural exoticism, the small tropical islands of our region have always been a paradise icon for tourism, an ideal "get away from it all". For small islands tourism can provide an opportunity to generate foreign exchange earnings and substantial employment benefits. However, together with the obvious benefits, there are costs and trade-offs in the development of tourism. There are numerous examples in the Pacific region where tourism development has proceeded in an uncontrolled or poorly planned fashion resulting in the loss of irreplaceable resources such as coral reefs and traditional cultural practices. To avoid these pitfalls, tourism needs to be developed sustainably; it needs to be well-planned and managed at a scale and form compatible with the natural and cultural environment unique to the Pacific.

Sustainable development makes practical as well as economic sense in the case of small islands. Even before the landmark United Nations Conference on the Environment and Development in Rio de Janeiro in 1992, organisations such as SPREP, the South Pacific Forum Secretariat and the Alliance of Small Island States (AOSIS) were active in bringing island issues to the attention of the international community (SPREP, 1992). The convening of a Global Conference on Small Island Developing States in Barbados in 1994 further highlighted the need to give special attention to the relationship between environmental quality and the sustainability of tourism development (SPREP and ESCAP, 1996).

As a result of these global commitments, many islands such as Samoa, have begun stating sustainability as a core part of their economic and tourism development strategies. Nevertheless, implementation of sustainable development, and especially sustainable tourism, has been slow and rather ad hoc in its progression. National tourism organisations (NTOs) of small islands often lack the capacity and resources to develop an integrated strategy for sustainable tourism, and there are few tools currently available to assist them.

This *Indicator Handbook* therefore seeks to address some of these issues, using the case of Samoa to provide a framework by which NTOs can develop their own objectives for sustainable tourism and identify realistic and practical indicators to monitor progress towards them. It is my hope that this publication will help provide the type of information and data that Samoa could use to further its sustainable tourism work. Perhaps this Handbook could serve as a model or pilot, if successful, to be used for similar developments in the area of tourism by other Pacific small island states.

Mr Tamari'i Tutangata
Director, South Pacific Regional Environment Programme (SPREP)

EXECUTIVE SUMMARY

Tourism is an increasingly important sector of the Samoan economy and also has a valuable and as yet under-utilised contribution to make towards social and environmental development in the country. But tourism is also a vulnerable industry, especially on a small island where its resources can easily be damaged by pollution or inappropriate development. If Samoa's tourism sector is to be successful in the long-term, it needs to address these concerns and develop a strategy to ensure the resources on which the industry and country depends (the attractions, the infrastructure, the facilities and services that make up the tourism product) are not put in jeopardy.

Monitoring sustainable tourism in Samoa

In November 1998, the Samoa Visitors Bureau (SVB) supported by New Zealand Official Development Assistance (NZODA), embarked on a project to set up a monitoring scheme for sustainable tourism in Samoa. The aim of the project was to develop a clear set of sustainable tourism objectives and to identify a practical and user-friendly set of indicators to monitor progress towards these objectives.

A team of experienced individuals from Government, the private sector, educational establishments, and intergovernmental organisations was set up to assist this process. The 12-members of this voluntary committee provided expertise and advice throughout the project, ensuring the validity of the research, the participation of a wide range of stakeholders, and giving weight to the project's findings and recommendations. There were three main parts to the project: the establishment of sustainable tourism objectives; the selection of indicators; and the setting up of a sustainable tourism action plan.

• **Establishing objectives**

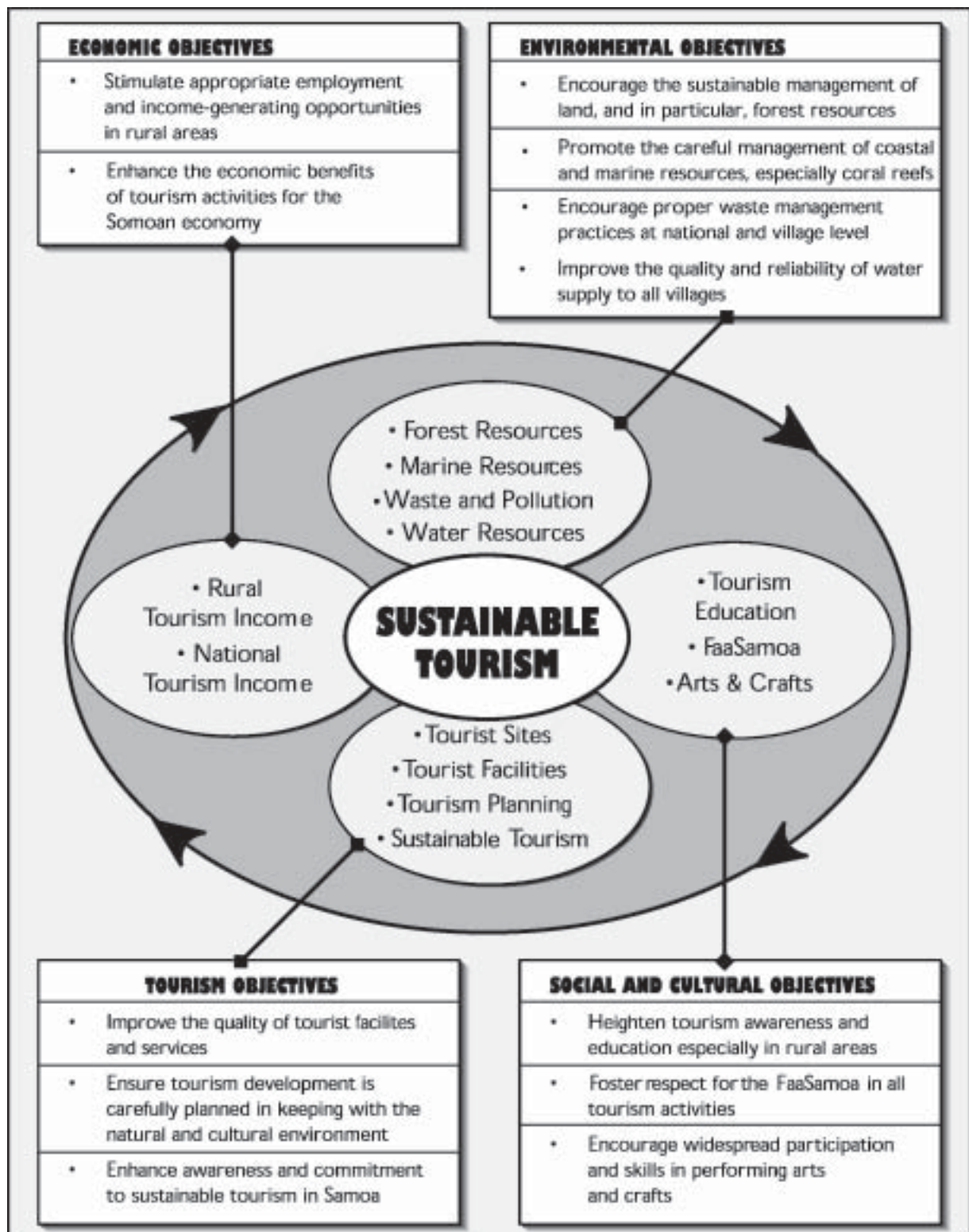
The reason for establishing sustainable tourism objectives was to clarify exactly what sustainable tourism means, not in the international context but in the context of Samoa. In January 1999, the SVB set about gathering information from local specialists, the tourism industry, and rural stakeholders, in order to develop its own sustainable tourism objectives. After numerous consultations, drafts and re-drafts, the final list of 12 objectives was completed on 7 May 1999 (see Figure 1). Samoa's sustainable tourism objectives set the targets for the future of tourism in Samoa. They show how tourism's potential can be utilised, not only for economic ends, but to achieve environmental, social and cultural development. The objectives can be used as the basis for tourism action plans, to assist operators consider the wider implications of their business, and to act as the benchmarks against which indicators can be used to evaluate tourism.

• **Selecting indicators**

With Samoa's sustainable tourism objectives in place, there was a clear need to develop sustainable tourism indicators to monitor performance. In the past, the tourism industry has relied on economic indicators to gauge its success, but these

only tell part of the story. The number of tourist arrivals tells nothing about the impact of tourism in rural areas, and the amount of money tourists spend tells nothing about where the money goes. Sustainable tourism indicators focus on the linkages between tourism resources and the country's environment and culture, giving a more holistic picture of the performance of the sector, as well as the tools for anticipating adverse situations. The indicators should provide the impetus for action before valuable assets are irreversibly damaged.

Figure 1: Samoa's sustainable tourism objectives



Key Results from 1999

To be effective, Samoa's sustainable tourism indicators had to be carefully selected to suit the situation in Samoa, the expectations of tourism stakeholders, and the research capacity and resources of the SVB. The aim was to develop one or two indicators to monitor each sustainable tourism objective. The Project Advisory Committee brainstormed a total of 270 indicators, and over several months these were tested, screened and finally reduced to the core set of 20 workable indicators.

The indicators, along with the key results from 1999, are shown in Table I. In order to make the indicator results easy to understand, the table has been divided into sections. In the first section are the "critical" sustainable tourism indicators. These are the key indicators to assess overall sustainability of tourism in Samoa. Following these are the environmental, economic, social and cultural sustainable tourism indicators. In order to help understand the indicator results, an acceptable range has been calculated for each indicator. This range represents the desirable performance for the indicator. The indicator's performance has been rated good, acceptable, poor or very poor according to how close the actual result comes to the acceptable range.

Table 1: Samoa's Sustainable Tourism Development Indicators

CRITICAL SUSTAINABLE TOURISM INDICATORS	RESULT	ACCEPTABLE RANGE	PERFORMANCE
Tourist landscapes under threat from development	20%	0-5%	V. POOR
New hotels undertaking environmental assessment	33%	90-100%	V. POOR
Evaluation of quality of key tourist attraction sites	35%	60-80%	POOR
Tourism operators using sustainable tourism practices	48%	60-80%	POOR
Hotel staff going on training courses	27%	25-50%	ACCEPTABLE
Environmental Sustainable Tourism Indicators			
Hotels using secondary or tertiary sewage treatment	8%	30-50%	V. POOR
Tourist participation in nature tourism	8%	20-40%	V. POOR
Tourism village participation in land conservation	26%	50-75%	POOR
Tourism village participation in marine protection	42%	50-75%	POOR
Tourism sites passing Samoa Water Authority (SWA) water quality tests	50%	70-90%	POOR
Tourist participation in marine tourism	23%	20-40%	ACCEPTABLE
Hotels composting their biodegradable waste	76%	60-80%	ACCEPTABLE
Water usage per guest night in hotels (in litres)	928*	500-1000	ACCEPTABLE
Economic Sustainable Tourism Indicators			
Contribution of direct tourism businesses to GDP	4%*	10-20%	POOR
Proportion of new businesses focused on tourism	4%	10-20%	POOR
Proportion of hotel jobs in rural areas	48%	40-60%	ACCEPTABLE
Social and Cultural Sustainable Tourism Indicators			
Villages included in tourism awareness programmes	28%	25-50%	ACCEPTABLE
Proportion of traditional events in Tourism Festivals	50%	50-70%	ACCEPTABLE
Proportion of handicraft stalls in the markets	21%	20-40%	ACCEPTABLE
Tourism operators informing visitors of village protocol	72%	50-70%	GOOD

* Data from 1998

Results from the first year of monitoring do not show trends over time, but they do give a snap-shot of the state of sustainable tourism in Samoa in 1999. They make it clear that it is time for action. Too many of the indicators are falling short of their acceptable ranges, and many of those that are rated “acceptable” are at the bottom end of the scale, warning of possible problems to come. Looking at the five critical sustainable tourism indicators, two were rated very poor, two were poor and one was acceptable. The highest scoring indicator this year was the number of tour operators providing visitors with information about village protocol. The best improved indicator from those with several years of data, was the increase in hotel employment opportunities in rural areas.

• **Action Plan for 2000**

Poorly performing indicators are warning signs that things are not progressing the way they should be. In order to secure tourism’s long-term sustainability, action needs to be taken to put these indicators back on track. The following ten areas will be the focus of Samoa’s Action Plan for 2000.

1. Environmental assessment
2. Tourist landscapes
3. Hotel sewage treatment
4. Water quality
5. Nature tourism
6. Attraction sites
7. Conservation efforts
8. New tourism businesses
9. Tourism’s contribution to GDP
10. Sustainable tourism practice

Future Perspective

The initial project development has now been successfully completed and tested, and the SVB has agreed to the following:

- * That the *Indicator Handbook* and *Sustainable Tourism Status Report* be released for public access.
- * That *Samoa’s Sustainable Tourism Objectives* is considered for possible inclusion as part of the forthcoming Tourism Development Plan.
- * That Samoa’s sustainable tourism indicators are annually monitored, the results published in a timely manner, and appropriate management responses actioned as part of the annual work programme of the appropriate SVB Divisions.
- * That the monitoring of Samoa’s sustainable tourism indicators is coordinated on an annual basis by the SVB Manager of Planning and Development with the support of the Manager of Research and Statistics.
- * That the ongoing commitment of the Project Advisory Committee is officially recognised and supported.

The Government’s *Statement of Economic Strategy 2000-2001* and *2002-2004* also stresses the importance of the sustainable tourism indicators. This commitment

from Government along with assurances from the General Manager of the SVB given at the third Annual Samoa Tourism Association Convention on 27 May, 2000, and again in the Samoa Tourism Development Plan, 2002-2006, will help to secure the future of the monitoring project.

Regional Perspective

Although the sustainable tourism objectives and indicators developed for use in Samoa will not necessarily be applicable for use to other areas, the methodology provided in this *Indicator Handbook* could be adapted for use in other small islands, setting the stage for a more sustainable tourism operation at a regional level. It is hoped that this demonstration of the development and success of the sustainable tourism monitoring project in Samoa will inspire other island nations in the region to take up this challenge.

INTRODUCTION

Samoa is an independent island state in the South Pacific located just east of the International Dateline, midway between New Zealand and Hawaii. It consists of two large islands and five smaller islands, and has a total population of 175,000. Upolu is the main island, home to 72% of the population, the international airport and the capital Apia with 34,000 inhabitants (Government of Samoa, 1999). Savaii, the largest of the islands, is separated from Upolu by an 18km wide strait, and has a population of 47,000, most of whom live in traditional coastal villages. The people of Samoa are Polynesian in origin, and the faaSamoa (the Samoan way of life) is strong and resilient, shaping every aspect of island life from birth to death, commerce to politics, architecture to musical expression, and providing a unique experience for tourists.

Samoa faces many of the economic constraints and challenges observed in other small islands in the Pacific, such as isolation from major markets, lack of local entrepreneurs and capital and complex customary land issues; yet since 1995 the economy has taken significant steps forward. Improved performance of exports, reform of the public sector, low annual inflation, and increased availability of credit for private sector development, have all contributed to the positive annual growth rates of up to 4% (Government of Samoa, 2000). The tourism industry has also played a significant role in this improvement, contributing a estimated 4% of Samoa's Gross Domestic Product (GDP), the second most important source of foreign exchange after remittances from Samoan people living overseas.

The history of tourism development in Samoa can be divided up into four distinctive periods; prior to 1978, 1979-1989, 1990-1993 and 1994-present. Before the commencement of regular flights by the national flag-carrier Polynesian Airlines and Air New Zealand in 1978, there was very little tourism development, with facilities exclusively focused on Apia. From 1979-1989 there was slow and steady growth and international arrival numbers increased from 40,400 in 1984 to 48,000 in 1990. The third phase, 1990 to 1993 produced zero growth while the country struggled to recover from two major cyclones and Taro Leaf Blight, an infestation that devastated the staple crop. Following these economic difficulties, the Government put greater priority on the development of tourism, by encouraging foreign investment and supporting the elaboration and implementation of the 1992-2001 Tourism Development Plan (GOS and TCSP, 1992). Combined with the pioneering efforts of the private sector in the setting up of the first few beach hotels and tour operations, these efforts are beginning to yield results, and the period 1996 to 1999 has shown the highest growth in visitor arrivals so far, increasing from 68,400 in 1996 to 87,688 in 2000 (SVB, 2000).

Despite recent growth, tourism in Samoa remains small-scale and predominately reliant on domestic capital and entrepreneurial skills. In a regional context, although its market share appears to be slowly increasing, Samoa is still well behind the regional leaders, Fiji and French Polynesia, and despite the establishment of marketing representation in New Zealand and Australia, the main purpose of visit is still "visiting friends and relatives" rather than pleasure tourism. The Samoa Visitors Bureau (SVB), a statutory corporation set up in 1984, is charged with the development and marketing of these products, as well as the implementation of the Samoa Tourism Development Plan, 2002-2006. However, a lack of both human and financial resources in SVB has made it difficult for them to effectively support the industry, and resulted in multiple and often unclear international marketing (Pearce, 1998).

Samoa does, however, have a lot to offer international as well as domestic pleasure tourists. The attractiveness of Samoa is in its varied natural scenery and uncrowded beaches, the traditional Polynesian culture and the legendary hospitality of its people. Over the last few years marine tourism and ecotourism have also become important tourism activities, with a dramatic increase in surfing and moderate growth in sea kayaking, diving and snorkelling.

In summary, although Samoa has a variety of natural and cultural attractions, tourism remains small-scale and its potential has, up until now, been only marginally realised. The Government of Samoa, concerned about the impact of tourism on cultural values, has adopted a cautious approach to tourism development. The previous Samoa Tourism Development Plan 1992-2001 (1992, pp. 109-110) states that:

“Western Samoa will undertake a planned, orderly and sustainable development of its tourism sector ”

This vision was further strengthened by the recently launched Samoa Tourism Development Plan 2002-2006 (Government of Samoa, 2002), which highlights five particular aspects of sustainable tourism in Samoa: i) generating continuing economic benefits throughout Samoa society; ii) contributing to general improvement in quality of life in Samoa; iii) reflecting and supporting the faa Samoa; iv) conserving and enhancing the country's natural and built environments and v) enhancing tourists' experience in Samoa.

Consistent with their policy direction, in November 1998, SVB agreed to embark on a project to set up a monitoring scheme for sustainable tourism in the country.

Project objectives

The main objective of the project was to:

- * develop a practical and user-friendly system for monitoring sustainable tourism in Samoa.

This was found to involve three key elements:

- * establishing exactly what sustainable tourism means in the context of Samoa by formulating a set of clear sustainable tourism objectives;
- * identifying, selecting and piloting a set of robust sustainable tourism indicators to monitor progress towards these objectives; and
- * setting up an effective implementation system to assist with the interpretation of indicator results and their translation into tangible action projects.

Indicator Handbook contents and use

The handbook is divided into two volumes. Volume one contains:

The introduction explains what sustainable tourism is all about and why indicators are important.

Part 1 provides a summary of the steps involved in developing the indicators, from the formulation of objectives to the interpretation of indicator results. This may serve as a guide to other organisations wishing to develop and use their own indicators.

Part 2 outlines a proposed monitoring schedule for the indicators and then makes some general recommendations about the future of the project and its possible implementation elsewhere.

Annexes include Samoa's Charter for Sustainable Tourism, a table of indicator results, the list of participants and references.

Volume two includes practical information about how to monitor the indicators identified for use in Samoa. It includes a series of information sheets detailing the form, function, data collection techniques and 1999 baseline results for each of the 20 selected indicators. The annexes contain questionnaires, a list of all the indicators considered and the indicator reporting charts.

What is Sustainable Tourism?

Sustainable tourism is interpreted here not as a new or alternative form of tourism such as ecotourism, but a way of ensuring *all* forms of tourism *contribute* as far as possible to the sustainable development issues and priorities in a particular place.

Four guiding principles have been used to focus sustainable tourism research in Samoa: the need to be place-specific, stakeholder-driven, adaptive and comprehensive.

Place-specific

The first principle of sustainable tourism as conceived here, is that its aims and objectives should be *place-specific*. The type and scale of tourism that is viable on a small island is very different to the type of tourism that can be sustained in a big city, as both environments have different capacities to cope with change. In the same way, the priorities and concerns of tourism stakeholders in Samoa are different from the issues faced in Tonga.

Stakeholder-driven

It follows, therefore, that in order to be effective, any scheme to implement sustainable tourism needs to not only to involve stakeholder consultation but be *stakeholder-driven* with a strong element of stakeholder control and management.

Adaptive

Thirdly, in order to cope with the dynamic and continually changing tourism environment, concepts, principles and practices involved in sustainable tourism should not be "cast in stone" but flexible and *adaptive*, involve continual organisational learning and be improved and developed over time.

Comprehensive

Finally, the study undertaken in Samoa has shown that sustainable tourism cannot be planned or managed in isolation from other aspects of life in a destination. An increase in dynamite fishing, for example, will decrease the attractiveness of the coral reef; pollution from hotels may diminish fish stocks; social unrest can affect visitor security and excessive hotel water usage could effect village health. To thrive in the long-term therefore, the linkages between tourism and the destination environment, economy, society and culture need to be identified and addressed in a *comprehensive* manner. These linkages can then be used as the foundation for a set of objectives for sustainable tourism.

Box 1 General Principles for Sustainable Tourism

World Tourism Organization (WTO), 1993, stated the following goals for sustainable tourism:

- Improve the quality of life of the host community;
- Provide a high quality of experience for the visitor; and
- Maintain the quality of the environment on which both the host community and the visitor depend.

The Lanzarote World Conference on Sustainable Tourism, 1995, stated sustainable tourism must be

- Ecologically bearable in the long term;
- Economically viable; as well as
- Socially equitable for the host communities.

What are the objectives of sustainable tourism?

In order to plan, manage or monitor sustainable tourism, it is first necessary to clarify exactly what sustainable tourism is. Formulating a set of objectives for sustainable tourism does just this by providing the yardstick that will enable tourism managers and policy-makers to gauge whether or not they are moving in the right direction.

In the context of lessons learned in Samoa, it has become clear that sustainable tourism objectives need to be place-specific, involve wide and full stakeholder consultation, be adaptive to changing circumstances and comprehensive in their coverage of the linkages between tourism and sustainable development issues. Progress towards these objectives can be usefully measured using sustainable tourism indicators.

What are sustainable tourism indicators?

An indicator is a tool used in monitoring and evaluation. Indicators help simplify complex issues by selecting and measuring one aspect as an 'indication' of the state of the whole. For example, temperature gives a good indication (but not a complete picture) of the weather, and the number of doctors per head of population gives an indication (but not a complete picture) of the state of public health care. In the same way, indicators of sustainable tourism in Samoa will give us an indication about the sustainability of tourism and contribution of tourism to sustainable development priorities in the destination.

Indicators are important because without timely and accurate information about the state of the tourism industry and resources on which it depends, it is difficult for tourism planners and policy-makers to assess change in the well-being of the destination over time. The information provided by the indicators can help show the weak and strong aspects of the industry, and where improvement is needed, as well as helping to identify possible action strategies.

Conventional tourism indicators such as arrival numbers, length of stay and expenditure have long been used to monitor a destination's performance. These worked reasonably well when the main consideration was the economic growth of the industry. But just as GDP has now been found to be an inadequate indicator of human welfare, in the context of our comprehensive approach to sustainable tourism, so are numbers of tourist arrivals and tourist expenditure only partial indicators of tourism's overall sustainability. The long-term viability of tourism in a place depends not only on economic strength but also on the state of its tourism resources and the environmental, social and cultural context within which they exist.

Sustainable tourism indicators differ from conventional tourism indicators in the focus they place on the linkages between tourism and some of the key issues affecting the overall development needs of the tourist destination. In this way, they can be characterised as multi-dimensional, reflecting the complex relationship between tourism and the environment, economy, society and culture of the destination.

The use of indicators for monitoring the sustainability of tourism in a place is still in its infancy and although many international tourism organisations state the importance of developing indicators, few have yet developed their own measurement systems. The need for development of sustainable tourism indicators in the Pacific has been clearly articulated by the Secretary General of the World Tourism Organization (Frangialli 1999: 20):

“In recent years, and particularly as a result of the 1992 Rio Earth Summit and the 1994 Barbados Conference, there has been evidence that various measures are being developed in Small Island Developing States (SIDS) and other islands to try to integrate tourism better in sustainable island development. Nonetheless, inter-island cooperation and information is still very weak and generally there is a shortage of specific knowledge and suitable indicators to evaluate the real situation.”

The most significant international attempt to develop indicators of sustainable tourism has been undertaken by the World Tourism Organization through its environmental task force (WTO, 1996). They suggest the use of eleven core indicators that can be used to compare progress between nations. These are shown in Box 2.

Box 2 World Tourism Organization (WTO) Core Indicators of Sustainable Tourism	
1. Site protection	Category of site protection according to World Conservation Union
2. Stress	Tourist numbers visiting site (per annum/peak month)
3. Use intensity	Intensity of use in peak periods (persons per hectare)
4. Social impact	Ratio of tourists to locals (peak period and over time)
5. Development control	Existence of environmental review procedure or formal site controls
6. Waste management	Percentage of sewage from site receiving treatment
7. Planning process	Existence of organised regional plan for tourism
8. Critical ecosystems	Number of rare/endangered species
9. Consumer satisfaction	Level of satisfaction by visitors
10. Local satisfaction	Level of satisfaction by locals
11. Tourism contribution to economy	Proportion of total economic activity generated by tourism

Although these indicators provide a useful starting point, it is suggested that as the objectives of sustainable tourism are seen here as being place-specific, the indicators used to monitor their achievement also need to be designed specifically to meet the priorities and concerns of a particular place.

This means that although methodological assistance can be found from other indicator programmes, the actual indicators are likely to be unique and non-transferable between destinations. This means they will often have to be developed from scratch, so they can be precisely focused on the needs of users and formulated in terms that mean something to the people who will use them.

What makes a good indicator?

Good indicators of sustainable tourism are relevant, resonant, reliable and simple to measure.

- * *A relevant indicator is one that is credible, unambiguous and relevant to key issues of the area they are designed to measure.*
- * *A resonant indicator is clear, interesting and useful to the main users, adapting terms, units and concepts with which people are familiar.*
- * *A reliable indicator provides a true reflection of the actual situation.*
- * *A simple indicator is one that can be easily measured because data is readily available or available at a reasonable cost-benefit ratio.*

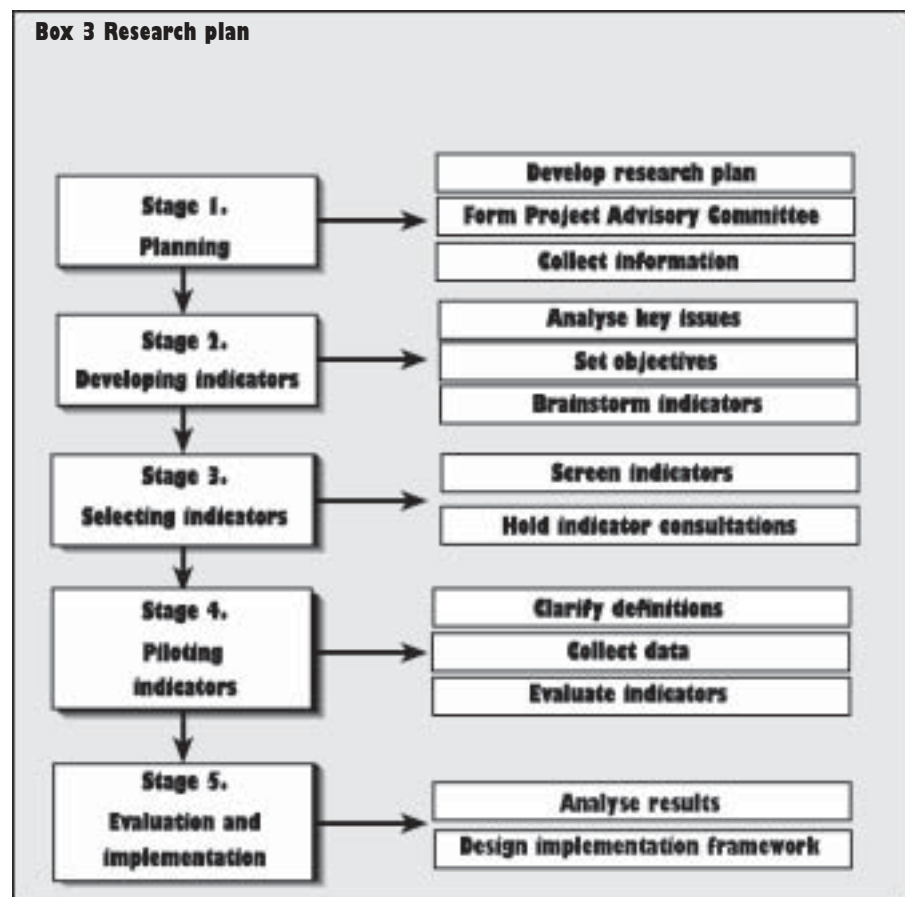
*To ensure the relevance, resonance, reliability and simplicity of sustainable tourism indicators, each one needs to be carefully selected and properly screened, tried and tested, and put into a well-balanced indicator framework. Part 1 details how this was achieved in Samoa. For further information on the development of sustainability indicators readers are directed to *The Guide to Sustainable Community Indicators (2nd ed.) (Hart, 1999)*.*

PART 1: INDICATOR DEVELOPMENT

This project was initially planned as part of the Ph.D. fieldwork of the author, a tourism researcher based in Samoa. The aim of the project was to develop a practical and user-friendly system for monitoring sustainable tourism in Samoa. The initial planning of the project and subsequent research design was influenced by two important considerations. First, if the project was to be implemented by and useful for the Samoa Visitors Bureau (SVB) they needed to be fully involved in the development process; second, if the objectives and indicators were going to be comprehensive in their coverage of sustainable tourism issues facing Samoa, they would have to be developed in partnership with the full range of local stakeholders.

The SVB enthusiastically took up ownership and management of the project in November 1998, and supported the formation of a 12-member project advisory committee to assist with the work. The subsequent role of the researcher ("the facilitator") was to facilitate the development of the indicators in close cooperation with the advisory committee.

The following text provides a summarised step-by-step guide to how Samoa's sustainable tourism indicators were developed and implemented. Five stages were involved in the development of the indicators: planning, developing objectives, selecting indicators, piloting indicators, evaluation and implementation. These are shown in Box 3, along with the different tasks involved in each of them.



Stage 1. Planning

1.1 *The aim of the first stage of the project was to develop the research plan and form the Project Advisory Committee (PAC).*

Development of the research plan

1.1.1

A clear research plan is important for any project. It helps ensure sufficient time and resources are available to enable the completion of the project, and allows for the identification of potential risks and alternatives well in advance.

In this project, the research plan was developed by the facilitator, in close collaboration with SVB and other key stakeholders from the four key areas of the project focus (environment, economy, society and culture and tourism). The feedback received was used to improve and finalise the plan. Funding was then applied for from the New Zealand Tourism Support Fund to assist with fieldwork costs. SPREP later made funds available for the publication of this handbook.

Formation of the Project Advisory Committee (PAC)

1.1.2

Given the comprehensive nature of the monitoring project, SVB realised that it would require a wider range of expertise than was currently available within their office. After some consideration, it was therefore resolved to invite a number of knowledgeable and respected individuals to act as voluntary project advisors and co-managers, a group that became known as the Project Advisory Committee (PAC). The PAC provided advice and direction throughout the development stages of the project, ensuring the validity of the research, the participation of a wide range of stakeholders, and giving weight to the project's findings and recommendations.

The PAC was carefully selected to ensure a balanced group, not only in terms of expertise, but also age, gender, origin, personality, and area of work (government, private sector, civil society organisation, educational institutions). It was decided to include at least two members for each of the key areas of project focus, plus three members from SVB and the facilitator. The resultant 12-member committee is shown in Box 4.

Nine PAC meetings were held over the 16 months during which the project ran. During the first PAC meeting on 14 December 1998, members discussed the project design as well as the role of the PAC. As a result of this meeting, a memorandum was sent to the SVB Board of Directors, which resulted in official status being granted for the project and the role of PAC being formally acknowledged.

Box 4 Project Advisory Committee (PAC)

Environmental advisory group

- *Easter Galuvao, Senior Biodiversity Officer, Department of Environment and Conservation*
- *François Martel, Programme Officer (Socioeconomic), SPREP*

Economic advisory group

- *Frances Brebner, Chief Planning Officer, Treasury*
- *John Stunnenberg and Greg Tilley, Commerce Department, National University of Samoa*

Social and cultural advisory group

- *Peggy Fairbairn-Dunlop, Head of Continuing Education, University of the South Pacific*
- *Fiu Mataese Elisara Laulu, Assistant Resident Representative, UNDP*

Tourism private sector advisory group

- *Joe Annandale, General Manager, Sinalei Reef Resort*
- *Fetogi Vaai, Assistant Manager, Vaisala Hotel*

Tourism public sector advisory group

- *Siuli Tuilemafua, Manager, Planning and Development, SVB*
- *Petelo Kavesi, Manager, Research and Statistics, SVB*
- *Sonja Hunter, General Manager, SVB*
- *Louise Twining-Ward, Facilitator*



**The Project
Advisory
Committee**

Stage 2. Developing objectives

1.2 *Before attempting to measure something, it is necessary to clarify exactly what is to be measured.*

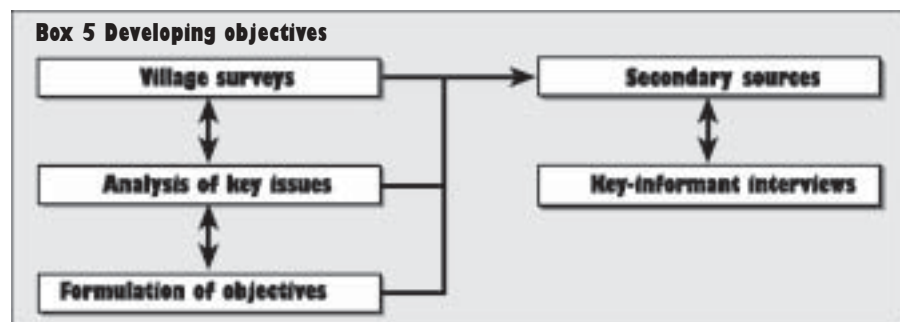
The aim of the second stage of the project was, therefore, to develop a set of objectives for sustainable tourism in Samoa.

Three main elements were involved in this undertaking: the collection of information, analysis of key issues, and the formulation of objectives.

Collection of information

1.2.1

Information on the development of the objectives was collected first by gathering information from secondary sources, then by conducting a series of key-informant interviews and, finally, by undertaking a number of village surveys.



A list of the most relevant and up-to-date sources of secondary information was drawn up with the assistance of PAC members. More than forty government and civil society reports, books and articles were reviewed in total (see Annex D) and the key issues, priorities and concerns raised were noted in tabular fashion. These notes were then discussed at the second PAC meeting and sorted according to project themes. As a result of this process, 34 key issues were identified and are shown in Box 6.

Box 6 Key issues from secondary sources**Environmental issues**

- Forest conservation
- Habitat protection
- Sustainable coastal and fisheries management
- Land-use planning
- Catchment area protection
- Waste disposal
- Energy efficiency and conservation
- Natural disaster protection

Social and cultural issues

- Population growth
- Migration
- Human resource development
- Health promotion
- Urban planning
- Participation of vulnerable groups
- Political freedom
- FaaSamoa value system
- Traditional arts and crafts

Economic issues

- Stable economic environment
- Reform of public sector
- Investment promotion
- Rural employment opportunities and income distribution
- Development of secondary sector
- Development of tertiary sector
- Regional co-operation
- Aid policies

Tourism issues

- Type, form and growth of tourism
- Infrastructure and utilities
- Enhancement of product and facilities
- Cultural impacts
- Pollution control
- National image and marketing
- Investment opportunities
- Land availability
- Tourism skills

Within any given population there are always going to be one or more individuals who are especially knowledgeable and insightful regarding particular issues and should consequently be given special attention in the research process. The key informant interviews were designed to tap this important source of information and in doing so, identify the key issues and concerns affecting each of the four sectors under investigation. Informants were selected by PAC members using a variation on the "snowball sampling" technique (identifying a member of the population of interest and asking them if they know anybody else with the required characteristics), and a sub-committee was formed to assist with the questionnaire design and interview piloting. Twenty-nine interviews were conducted in total; each was taped and lasted on average 50 minutes. As a result of the interviews, 22 key issues were identified, many confirming those issues found from the review of secondary sources. These are shown in Box 7.

Box 7 Key issues from informant interviews**Environmental issues**

- Deforestation
- Destructive fishing practices
- Solid waste management
- Cyclone vulnerability
- Quality and reliability of water supply

Social and cultural issues

- Lifestyle diseases
- Youth unemployment
- Church and spiritual needs
- Weakening of traditional ideals
- Weakening of traditional authority
- Decline in craftsmanship

Economic issues

- Low levels of foreign investment
- Limited formal employment
- Reliance on remittances and aid
- Narrow income base
- Land tenure

Tourism issues

- Poor product focus
- Lack of accommodation capacity
- Lack of market awareness and image
- Lack of skills and experience
- Poor infrastructure and utilities
- Environmental and cultural impacts

The final step in the collection of information was the village surveys. The aim of the surveys was to ensure the priorities and concerns of those living in rural areas were also taken into consideration. Four villages were selected using a semi-stratified sampling frame; Mataututai, Maninoa, Saluafata in Upolu and Fatuvalu in Savaii. In total, 100 household interviews and 12 focused group meetings were conducted. Respondents were asked about their personal needs and priorities, how these can be achieved as well as their thoughts on the benefits and concerns associated with tourism in their village. The key findings from the village surveys are shown in Box 8.

Box 8 Key issues from village surveys

Personal needs and priorities

- Plantation development
- Education for children
- Build or improve house
- Food security
- Migration
- Consumer goods e.g car, fridge

Tourism benefits and concerns

Benefits

- Employment
- Selling crafts and produce
- Beautification

Concerns

- Drugs and diseases
- Impact on culture

Analysis of key issues

1.2.2

Once all the consultations had been completed, the issues were analysed and combined, and those with little direct relevance to tourism e.g. lifestyle diseases, were removed. As a result of this process, 12 key areas for STD emerged and are shown in Box 9.

Box 9 Combined list of key issues

1. Forest resources
2. Coastal environment, particularly coral reefs
3. Waste and pollution
4. Water quality and usage by tourism industry
5. Tourism employment and income generation in rural areas
6. Tourism contribution to national economic development
7. Tourism training and awareness
8. Tourism respect for faaSamoa
9. Participation in arts and crafts
10. Tourism facilities and services
11. Planning and development of tourism
12. Sustainable tourism awareness and practices

Formulation of objectives

1.2.3

The combined list of key issues shown above was used as the basis for drafting the objectives for sustainable tourism in Samoa. Twelve objectives were drawn up by the facilitator and SVB and then reviewed and re-drafted with the help of PAC members over a period of one month.

The final list of objectives was prepared as a Charter and accepted by members on 14 May 1999 as the guiding document for the rest of the project. The full charter is attached as Annex A. A summary of the 12 objectives is given in Box 10.

Box 10 Summary of objectives

1. *Encourage the conservation of land, and in particular, forest resources*
2. *Promote the careful management of coastal and marine resources, especially coral reefs*
3. *Encourage the use of proper waste management practices, at national and village level*
4. *Seek to improve the quality and reliability of water supply to all areas*
5. *Stimulate appropriate employment and income-generating opportunities in rural areas*
6. *Enhance the economic benefits of tourism activities for the Samoan economy*
7. *Heighten tourism awareness and education especially in rural areas*
8. *Foster respect for the faaSamoa in all tourism activities*
9. *Encourage and promote widespread participation in performing arts and crafts*
10. *Improve the quality of tourist experience by upgrading sites, facilities and services*
11. *Ensure tourism development is carefully planned and of a scale and form compatible with the natural and cultural environment*
12. *Enhance awareness and adoption of sustainable tourism principles and practices in Samoa*

It was clear that the more specific the objectives were, the easier it would be to develop indicators to monitor them, so particular care was taken with their formulation and the development of sub-objectives, shown in Annex A. Due to the large amount of work invested in the development of the objectives, it was then decided to use them as a basis for a Charter for Sustainable Tourism Development in Samoa. This was developed and has subsequently been used as a guide to SVB Policy and Planning activities and was a founding document for the Samoa Tourism Development Plan, 2002-2006.

Stage 3. Selecting indicators

1.3 *The aim of Stage 3 was to identify existing or develop new indicators that could be used to assess progress towards the achievement of each of the defined objectives.*

As discussed in the introduction, the indicators needed to be relevant, resonant, reliable and measurable.

There were two parts to the selection of indicators: first the brainstorming and then the screening.

Brainstorming indicators

1.3.1

The aim of the brainstorming process was to think up a wide range of possible indicators to measure progress towards each of the objectives. The brainstorming was kick-started with the review of secondary sources on indicators. This provided a base list of 32 possible indicators which PAC members could then review, add to, and change. Members first brainstormed the indicators in small groups and, later, when the base list had been further developed to 57 possible indicators, the whole PAC group met to discuss and decide on the working list of indicators that would go on to further screening. All the indicators considered are listed in Volume 2 of the Indicator Handbook.

Screening indicators

1.3.2

The next important task was to screen the indicators to ensure each one was valid, measurable, and suited to the circumstances in Samoa, and, by rejecting those that were not, reduce the number of indicators to a workable set of between 12 and 24. The indicator screening was undertaken in two parts; round-one screening was for relevance and measurability. Successful indicators were then put forward for round-two screening for public resonance (user-friendliness).

Round-one screening was conducted by the facilitator and SVB. Each of the 57 indicators was checked against the 10 criteria listed in Box 11. The first six questions acted as the "killer criteria" and any indicator not matching these was immediately rejected. The remaining indicators were then required to pass at least two of the four last questions. As a result of this process 35 indicators were put forward for round-two screening.

Box 11 Screening criteria

1. *Is the indicator clearly focused on the corresponding objective?*
2. *Is the proposed data collection method likely to produce reliable and objective data?*
3. *Is the data collection feasible in terms of both human and financial resources of SVB?*
4. *Is the indicator likely to be useful over a number of years?*
5. *Is it clear which direction of change is designated as acceptable?*
6. *Does the indicator have national relevance?*
7. *Does historical data exist for this indicator?*
8. *Does the indicator use secondary as opposed to primary data?*
9. *Does the proposed data collection method involve the participation of agencies and individuals apart from SVB?*
10. *Is the indicator simple to calculate and easy to understand?*

The user-friendliness screening involved the development of a screening questionnaire (included in volume 2) where key informants could note the degree to which they agreed or disagreed with the inclusion of a particular indicator, on a scale of 1-5. As a result of this screening process, 24 indicators were selected and approved by the PAC at a meeting held on 14 September 1999. These are shown in Box 12.

Box 12 First working list of indicators

- 1a) *Village participation in conservation programmes*
- 1b) *Tourist visits to conservation areas*
- 2a) *Village participation in marine conservation programmes*
- 2b) *Tourist participation in marine activities*
- 3a) *Type of hotel waste-water treatment*
- 3b) *Type of hotel solid waste management*
- 4a) *Tourism accommodation with potable tap water*
- 4b) *Hotel water usage*
- 5a) *Rural tourism employment*
- 5b) *Tourism businesses located outside Apia*
- 6a) *Newly registered tourism businesses*
- 6b) *GDP generated by the tourism industry*
- 7a) *Villages included in awareness programmes*
- 7b) *Hotel employees who have been on training courses*
- 8a) *Provision of information about village protocol by tourism operators*
- 8b) *Villages providing a traditional home-stay experience*
- 9a) *Entries in traditional dance competition*
- 9b) *Exhibitors at annual craft fair*
- 10a) *Quality rating given to attraction sites*
- 10b) *Quality of service in key tourism enterprises*
- 11a) *Hotels with environmental assessments conducted*
- 11b) *Historical and cultural sites protected by national law*
- 12a) *Tourism operators showing commitment to sustainable tourism*
- 12b) *Projects undertaken as a result of monitoring programme*

Stage 4. Piloting the indicators

1.4 *The aim of Stage 4 was to pilot the proposed indicators by attempting to collect the base-line data. In this way the feasibility of the indicator would be tested, and at the same time monitoring protocols could be developed.*

The main activities in Stage 4 were indicator consultations, definition formulation and data collection. During each of these activities the indicators were piloted, tested, and, where necessary, adapted, modified and improved.

Indicator consultations

1.4.1

The first part of the piloting process was to investigate each of the indicators in turn and collect information that would assist the PAC to improve the wording, highlight terms needing definition, make draft plans for data collection and identify key people or sources of secondary information.

Definition formulation

1.4.2

Having re-formulated some of the indicators, the next task was to clarify some of the terms used in the indicators. Every indicator is a phrase made up of a number of concepts such as "holiday-maker" or "marine-tourism". In order to ensure that concepts used in the indicators are understood in the same way each time the indicator is used, precise definitions were needed, not in the international sense, but definitions that could be understood in the context of Samoa.

Data collection

1.4.3

For the indicators relying on secondary information, official letters requesting the necessary information were then sent to relevant government departments. These were followed up with the responsible personnel.

For the primary data collection activities, a survey of 25 accommodation facilities, 21 tour operators, 20 attraction sites and 3 craft markets was conducted over a six-week period. The first two were conducted using telephone interviews, the attraction site inspection was undertaken by a PAC survey team using a standardised evaluation sheet, and the craft market survey was a manual counting exercise conducted by the facilitator. The questionnaire schedules used for these surveys are provided in Volume 2 of this Handbook.

Stage 5. Evaluation and implementation

- 1.5** *The purpose of the last stage in the project was to evaluate the indicators, analyse and interpret indicator results and plan the indicator implementation framework.*

Indicator evaluation

1.5.1

Analysis of pilot results was conducted together with the PAC during the eighth PAC meeting on 13 January 2000. Each indicator was re-evaluated and fine-tuned by the PAC according to its usefulness, the validity of results and effort involved in collecting the information. As a result of this meeting four indicators were rejected (5b, 8b, 10b and 12b), four were significantly altered (4a, 9a, 9b and 11b) and the remaining 16 were accepted with just minor alternations and improvement. The final list of 20 indicators is shown in Box 13.

Analysis and interpretation of indicator results

1.5.2

The data from each of the indicators was collected and transferred into a Microsoft Excel spreadsheet, which SVB is familiar with. In order to assist SVB to interpret indicator data, the next task was to decide on acceptable ranges for each of the indicators. An acceptable range represents the minimum desirable performance for the indicator. The indicator performance is then rated as good, acceptable or poor, according to how close the actual result comes to the acceptable range. Having acceptable ranges for each indicator enables data users to quickly and easily interpret the indicator results on the basis of whether they are better or worse than the acceptable range, and how this compares with their performance in previous years.

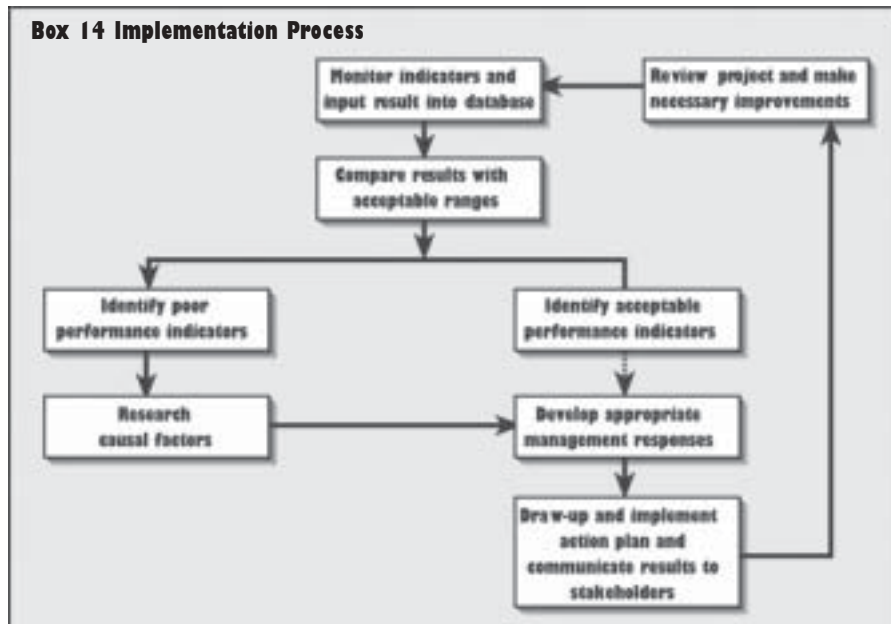
The acceptable ranges were decided on the basis of existing results, expert opinion and information from other areas where similar indicators have been monitored. They represent a compromise between what is the preferred state and what is a realistic target given the current baseline. Along with other aspects of the project, these will need to be re-assessed regularly in the light of new useful information that may become available. The acceptable ranges for each of the indicators are shown on the table of results in Annex B.

Box 13 Final list of indicators

- 1a) *Percentage of villages important to tourism, participating in land and forest conservation programmes*
- 1b) *Percentage of all holiday-makers to Samoa, going on nature tours*
- 2a) *Percentage of coastal villages important to tourism, participating in marine conservation programmes*
- 2b) *Percentage of all holiday-makers to Samoa, taking part in marine tourism activities*
- 3a) *Percentage of tourist accommodation facilities, using secondary or tertiary waste-water treatment systems*
- 3b) *Percentage of tourist accommodation facilities, recycling their bio-degradable wastes*
- 4a) *Percentage of villages important to tourism in the Samoan Water Authority (SWA) sampling programme, whose water meets SWA quality standards*
- 4b) *Average volume of water used per guest night, in hotels with water meters*
- 5a) *Percentage of full time jobs in tourist accommodation facilities, that are located in rural areas*
- 6a) *Percentage of newly registered tourism businesses, compared to other newly registered businesses*
- 6b) *Percentage of GDP generated by tourism businesses*
- 7a) *Percentage of villages important to tourism, included in tourism awareness programmes*
- 7b) *Percentage of full-time tourist accom-modation employees, who have been on training courses during the year*
- 8a) *Percentage of hotels and tour operators, consistently providing visitors with information about village protocol.*
- 9a) *Percentage of traditional events in the Teuila and Independence Festival Programmes*
- 9b) *Percentage of stalls in the three main markets, selling handicrafts as the main product*
- 10a) *Percentage of the top 20 most visited attraction sites, rated either good or excellent in terms of their services, facilities and environment*
- 11a) *Percentage of newly registered tourist accommodation facilities, that have had an environmental assessment conducted*
- 11b) *Percentage of key tourist sites and landscapes, damaged by inappropriate developments (on a cumulative basis)*
- 12a) *Percentage of tourism operators, adopting sustainable tourism practices*

Implementation framework**1.5.3**

The indicator “implementation framework” is the chain of reactions that ensures the indicators are regularly monitored, poor performance indicators quickly identified and necessary management responses actioned. This helps bridge the gap which often exists between indicator development and actual use. Box 14 shows the suggested implementation process for this project.



Monitor indicators

Phase 1:

Indicator results are monitored and resulted inputted into indicator database and plotted on the reporting cards included in volume 2. The results from 1999 monitoring of Samoa's sustainable tourism indicators can be found in Annex B.

Compare results with acceptable ranges

Phase 2:

Indicators are then divided into three groups according to how they have performed.

Peak performance indicators: scoring better than the acceptable range

Acceptable performance indicators: scoring within the acceptable range

Poor performance indicators: scoring lower than the acceptable range

Research possible causal factors

Phase 3:

Once it is clear which indicators are not performing within their acceptable range, it is important to check the cause. It may help to review a check-list of questions:

Has the data been properly collected?

Have there been any significant changes in the data set or sample size?

Could any external factors have affected the indicator?

Some causal factors will be relatively easy to identify and mitigation techniques fairly simple. For others, however, there will not be any obvious answers or solutions, and further discussions may be needed with PAC members and other key people and agencies involved before action can be taken.

Decide on appropriate management responses

Phase 4:

The next step is to decide on appropriate management responses. To assist in this process, a list of suggested responses is provided at the end of each of the indicator information sheets in volume 2. Other possible projects can be discussed by SVB, PAC and the relevant government departments or agencies.

Draw up and implement action plan

Phase 5:

All the project ideas then need to be planned and prioritised and directed to the appropriate organization for actioning. The Division of Planning and Development will act as the coordinating agency, and will be responsible for drawing up an action plan of all the suggested management responses and following up on their implementation.

Review and re-monitor

Phase 6:

The indicators, results, and project as a whole can then be reviewed and improved based on lessons learned before the indicators are re-monitored.

PART 2: RECOMMENDATIONS FOR ACTION

Samoa's Sustainable Tourism Indicators have now been developed and monitored for the first time and the Samoa Visitors Bureau (SVB) has made a commitment to their long-term monitoring. Their long-term usefulness will depend on two key factors; their continuous updating and the translation of results into tangible action projects.

Responsibility for the development of the indicators was taken by the SVB, Division of Planning and Development. This Division has also indicated its readiness to undertake the regular monitoring of the indicators and the coordination of action projects supported by the Division of Research and Statistics. This will involve the management of a regular monitoring schedule, including data collection, publishing of results and implementation of an annual action plan.

Monitoring schedule

2.1 *There are five phases in the suggested annual monitoring schedule for the project.*

As can be seen in the table, it is suggested that the annual monitoring schedule starts in December each year with a review of the indicators prior to data collection in January.

PHASE	MONTH	TASK
Phase 1.	December-January	Review indicators and start data collection
Phase 2.	March	Update database
Phase 3.	April	Publish indicator results
Phase 4.	May	Draw up annual action plan
Phase 5.	June-April	Implement action plan

Data collection

Phase 1:

The usefulness of the indicators depends on the reliability, objectivity and accuracy of data collection techniques. To assist this process, the information sheets in Volume 2 of the Indicator Handbook gives step-by-step instructions for data collection. These need to be followed carefully and each year any necessary changes such as improvements to questionnaires and methodologies should be recorded in these sheets so they can be used consistently in future years.

To ensure Samoa's sustainable tourism indicator project remains up to date and reflects new issues affecting tourism in Samoa, occasionally, small changes, additions and subtractions may need to be made to the indicators. However, these should only be undertaken after proper consideration, as altering the indicator focus too soon will make it difficult to compare results from year to year. A more thorough review and evaluation of all the objectives, indicators and monitoring systems is recommended after five years in operation. This is the chance for the SVB to re-evaluate the project and adapt the indicators to reflect new tourism developments and other environmental changes that may have occurred in the intervening period.

The data collection process itself may take up to six weeks to complete, with the analysis and publication of results, taking a further two weeks. The work may not necessarily be full-time over this period but some information-gathering may involve several weeks' wait, so it is advisable to start the process early.

It should be noted that some of the data to be collected is of a sensitive nature, particularly that referring to specific tourism businesses and their operational practices. The data collection team should take the utmost care to maintain the confidentiality of respondents. Failure to do this could compromise the willingness of respondents to provide this information in future years.

Update database

Phase 2:

Following the data collection process, each year it is necessary to update the Indicator Database. Data from 1999 has been entered and forms the baseline; and columns allow for the addition of data over the next five years.

Two copies of the database need to be made available; one for public access (linked to the SVB website), where the names of hotels and operators have been removed, and the other with the full information to be used in the annual updating and analysis of indicator results.

Publish indicator results

Phase 3:

It is important that once the indicator results are collected, they are promptly published and distributed widely. This can be done in the form of an easy-to-read bulletin or status report and also through the SVB website. The Status Report will need to include the key results from the annual monitoring, along with information and progress on sustainable tourism action projects undertaken during the year. General information about sustainable tourism and why monitoring is important can also be included to assist in improving public awareness levels in these areas. Samoa's Sustainable Tourism Status Report 2000 has already been prepared and can act as a blueprint for future status reports. This has been used as the Executive Summary for this Handbook.

Draw up annual action plan

Phase 4:

Every year, after the data is collected and inputted it will need to be analysed and interpreted in terms of the 'acceptable range', as well as results from previous years (this process is described more fully in Part 1, 1.5.2 "Analysis and interpretation of indicator results"). Consideration will also need to be made to the size of the data set and sample size each year, as this will influence the validity of results and their relation to the predetermined acceptable ranges. Acceptable ranges are not, therefore, a substitute for careful analysis of data but simply to be used as a point of reference against which to compare results.

The job of SVB is then to identify appropriate management response options and draw up the annual Sustainable Tourism Action Plan. The Project Advisory Committee (PAC) may also be able to provide assistance in this task and help prioritise the action projects.

Implement action plan

Phase 5:

The final task each year is to implement the action plan, setting up the different action projects, following them through and reporting the results to the PAC and other stakeholders. Whilst it should be remembered that poor performance indicators receive priority attention for action, in order that sustainable tourism is approached in a pro-active rather than just reactionary manner, it is recommended that action is considered even for indicators giving acceptable performance. In this way good performance can be improved on rather than just maintained.

Final recommendations

2.2

This project started as Ph.D. fieldwork, but after four years research, 16 months fieldwork and the assistance of several hundred friends, colleagues and stakeholders across the length and breadth of Samoa, it has taken on a life of its own, exceeding initial expectations and proposed outputs.

We have found, collectively, that monitoring sustainable tourism is about much more than just identifying indicators. Monitoring sustainable tourism involves adopting a comprehensive approach to tourism development in a particular place, getting stakeholders involved, participating and having a sense of ownership of the project, and continually seeking to adapt and improve monitoring systems.

A voluntary committee of 12 knowledgeable stakeholders has been set up, a Charter for Sustainable Tourism Development in Samoa has been developed and a set of sustainable tourism indicators identified that with minimal experience, limited funding and regular adjustments to reflect the dynamic nature of the comprehensive tourism system, will enable SVB to continue to monitor sustainable tourism on an on-going basis. Now it is time to put this knowledge and experience to the test and move on from development to every day use.

The following final recommendations are made for the project:

- * That the PAC be asked to take up a new function, meeting twice a year to assist the project manager to interpret indicator results, decide on appropriate management response options and draw up the annual action plan.*
- * That the Charter for Sustainable Tourism Development in Samoa be used as a guiding document for the new Samoa Tourism Development Plan 2002-2006.*
- * That Samoa's sustainable tourism indicators are regularly monitored, the results published in a timely manner and appropriate management responses are actioned as part of the annual work programme of appropriate SVB divisions in partnership with other relevant government departments and organisations.*

If these recommendations are followed up there is no reason why the indicators may not be able to move well beyond their initial role of providing information to assist with tourism planning and decision-making, and play a pro-active role in improving the way tourism is planned and managed in Samoa in the new millennium.

Postscript

This Handbook was originally prepared in 1999 for publication in 2000, but due to unforeseen circumstances was delayed until 2002. As a result, some of the people referred to now hold new positions and some of the organisations have changed their names.

In the intervening period, although re-monitoring of the indicators (now underway) was postponed by the Samoa Tourism Development Plan process, considerable progress has been made in terms of the implementation of the Action Plan for 2000 (shown on page xv). A workshop has been run for conservation area managers, and a new attraction site information brochure produced for tourists. A training manual for both tour guides and attraction site managers has also been produced, a workshop held for hoteliers on sustainable tourism practices, and a committee formed concerning the economic monitoring of tourism. Four other areas of action that are on-going include the review of waste water standards, water quality issues, work on the restoration of damaged tourist sites and the criteria for environmental assessment screening. The monitoring project has also become an integral part of Samoa's Tourism Development Plan 2002-2006 and the work plan that will guide its implementation.

In this way Samoa's Sustainable Tourism Indicators and resultant action plan have provided an effective focus for SVB activities, whilst helping to justify funding applications to donor agencies. The project has also clearly demonstrated how, by adopting a participatory approach to indicator development, monitoring can be closely linked to action and generate not only the capacity but also the will to implement positive change.

Louise Twining-Ward

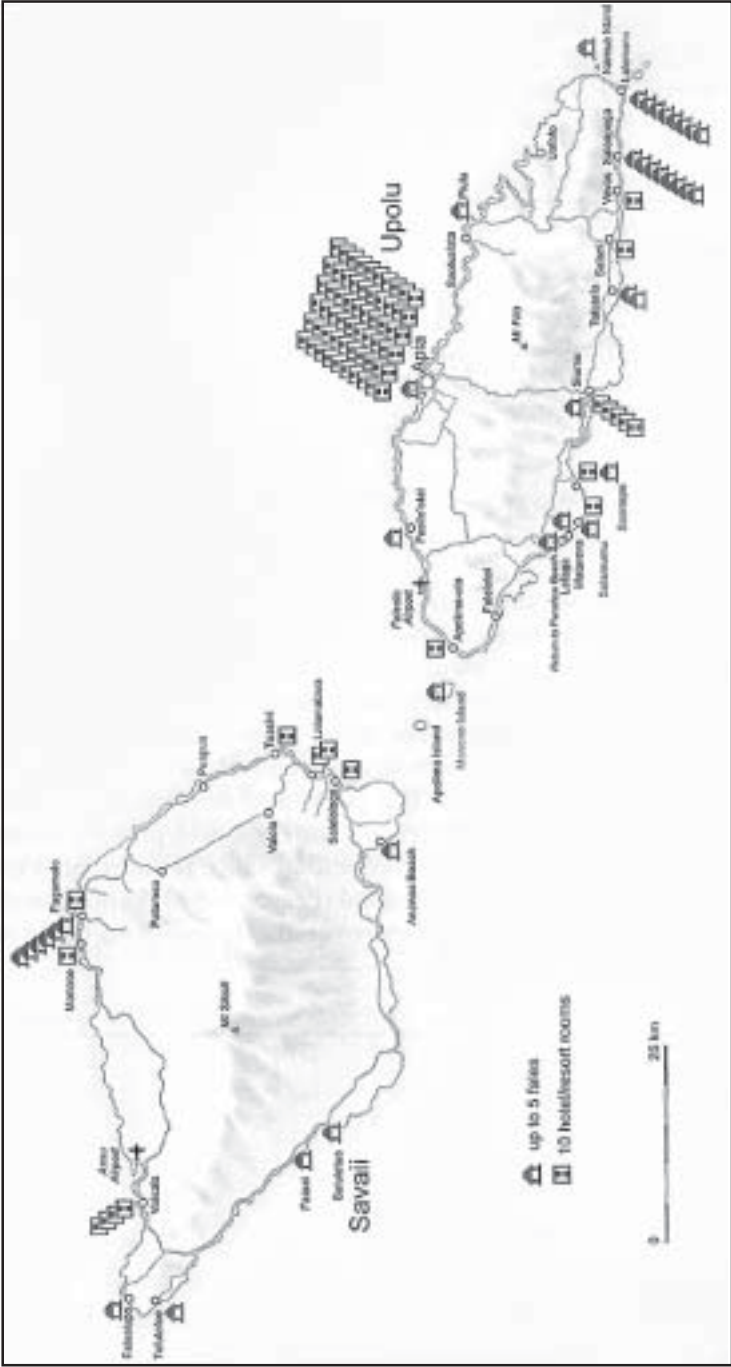
October 2002

MAPS

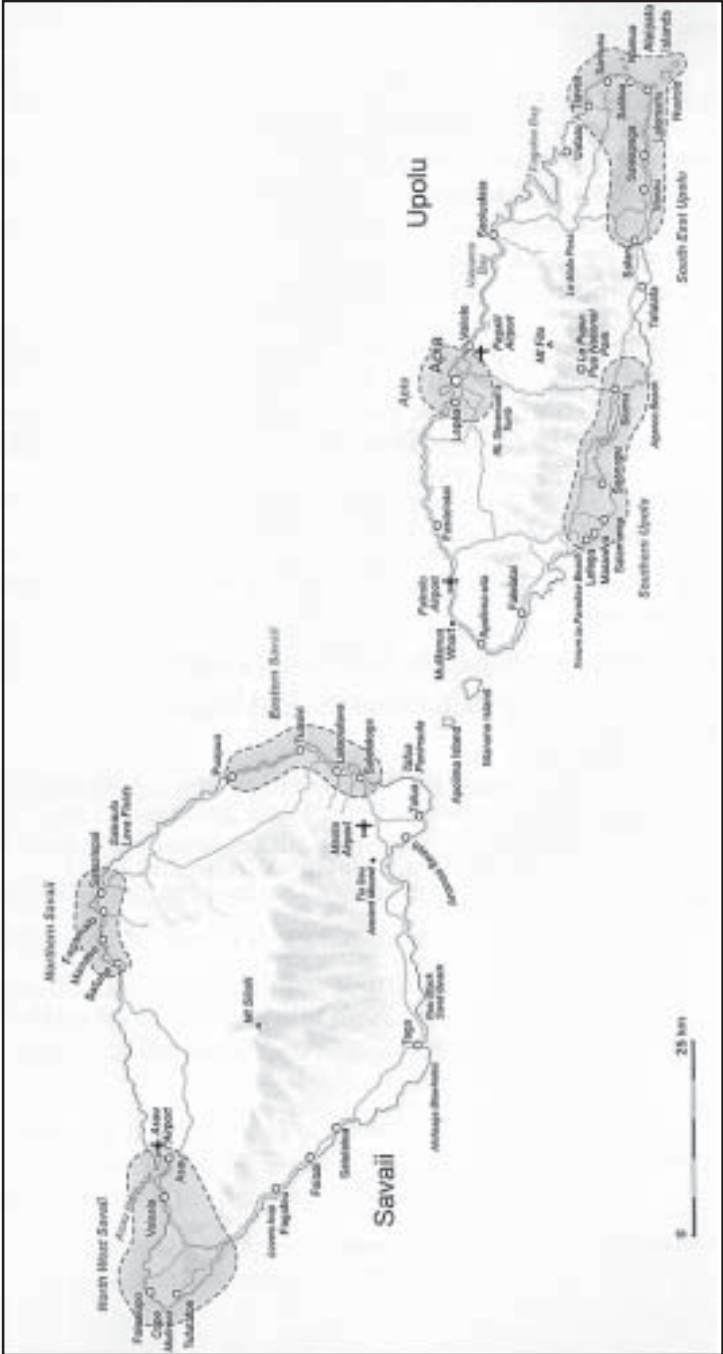
Map 1: Location of Samoa



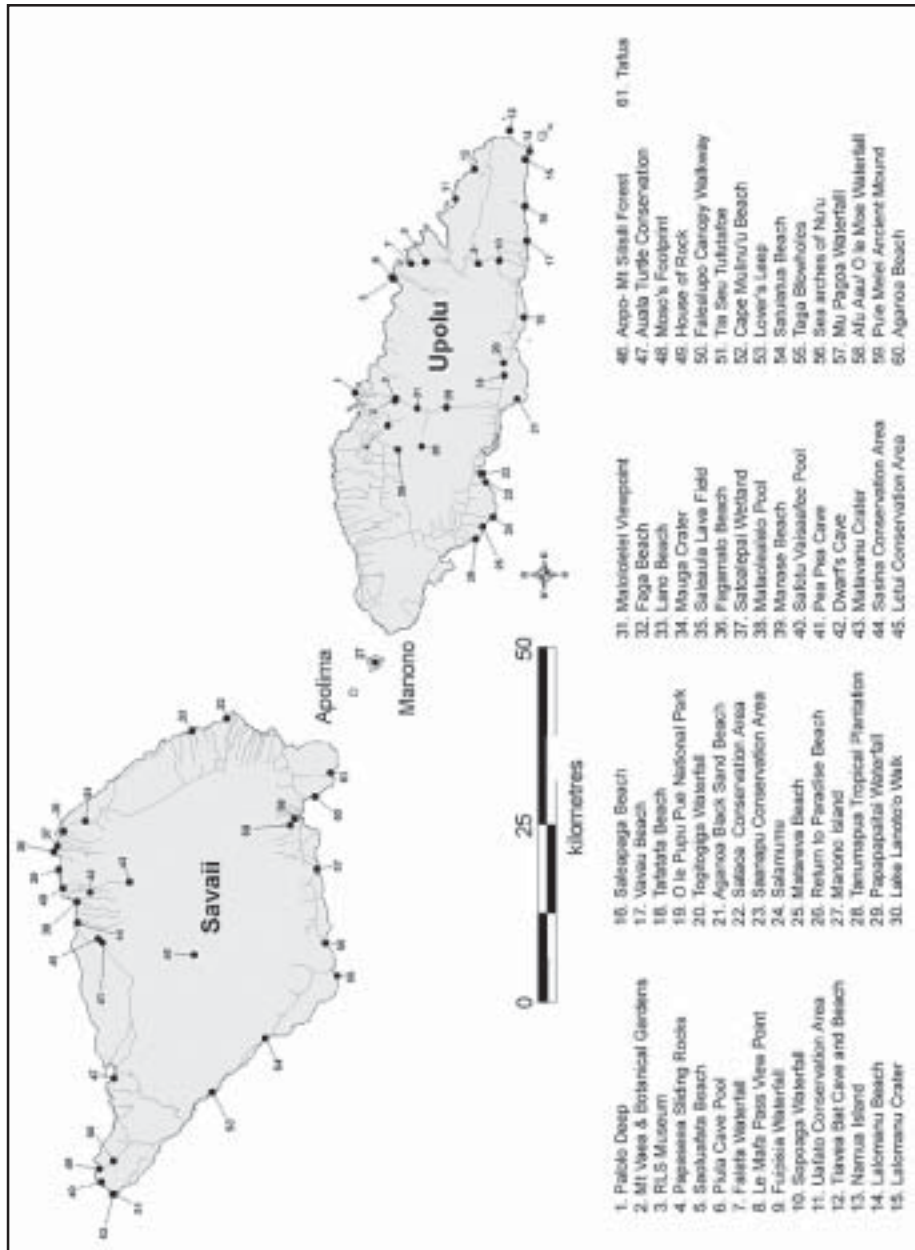
Map 2: Hotels and Accommodation



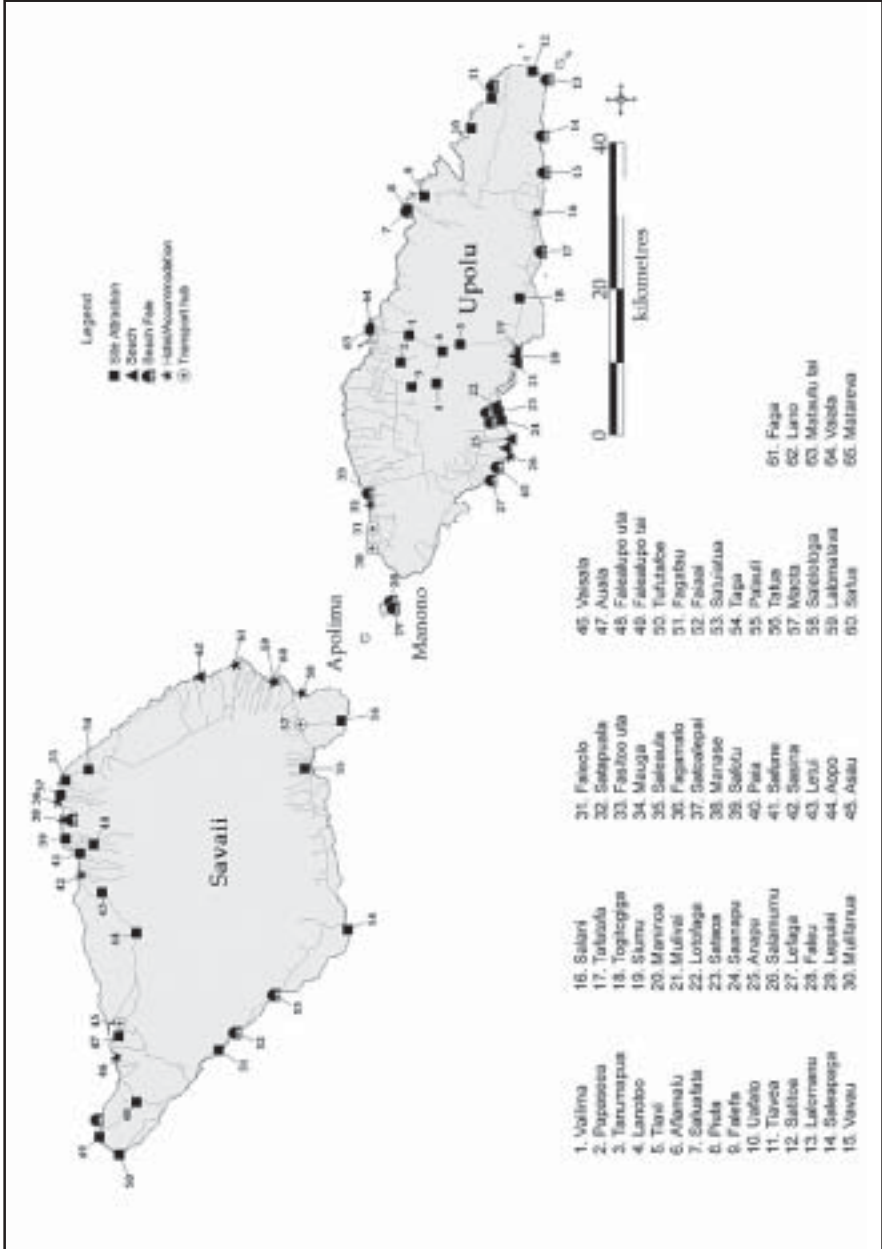
Map 3: Tourism Development Centres



Map 4: Tourism Attraction Sites



Map 5: Villages Involved in Tourism



Annex A CHARTER FOR SUSTAINABLE TOURISM DEVELOPMENT IN SAMOA

Preamble	<p>We, the Project Advisory Committee (PAC) for the project “Monitoring Sustainable Tourism Development in Samoa”:</p> <ul style="list-style-type: none">* Aware that the long-term viability of tourism in Samoa is of significant national importance;* Convinced that tourism can make a substantial contribution to sustainable development in Samoa;* Recognizing that a healthy natural and cultural environment and hospitable people constitute vital tourism resources;* Concerned that poorly planned and managed development of all types has the potential to cause undesirable and even disastrous impacts on these resources;* Guided by the principles of sustainable development as laid out in 1992 Rio Declaration, Agenda 21 and the Barbados Programme of Action, as well as international conventions on sustainable tourism such as the 1995 Lanzarote Charter for Sustainable Tourism and the 1997 Berlin Declaration on Biological Diversity and Sustainable Tourism; <p>Have worked together to develop, through wide ranging consultation, a set of broad-based objectives which, if regularly reviewed to reflect the dynamic nature of the total human environment, will form the basis for the sustainable development of tourism in Samoa.</p> <p>We recognize that the implementation and monitoring of these objectives is not the responsibility of the Samoa Visitors Bureau alone, but necessitates the cooperation of other Government agencies in partnership with the private sector, civil society organizations, citizens of Samoa and those visiting from overseas.</p> <p>We urge the Government and People of Samoa to take up this challenge.</p> <p>Objectives 1-4 focus primarily on environmental issues that need to be addressed in the context of sustainable tourism development.</p>
Objective 1.	<p>Encourage the conservation of land and in particular forest resources</p> <ul style="list-style-type: none">* Encourage the participation of village communities in conservation programmes* Promote the careful use of tourism as an income generating activity for conservation areas and other natural areas under protection
Objective 2.	<p>Promote the careful management of coastal and marine resources with special focus on coral reefs</p> <ul style="list-style-type: none">* Encourage the participation of village communities in marine conservation programmes* Promote the careful use of tourism as an income generating activity in coastal areas

Objective 3.	<p>Encourage the use of proper waste management practices at both the national and village level</p> <ul style="list-style-type: none"> * Enhance village awareness of appropriate waste disposal methods * Encourage the tourism industry to adopt appropriate solid and human waste management practises
Objective 4.	<p>Seek to improve the quality of water and efficiency of water usage in all areas</p> <ul style="list-style-type: none"> * Work together with responsible agencies to upgrade the quality and reliability of water supply especially to rural areas where tourism is being developed * Promote measures to increase efficiency in the use of water resources particularly by the tourism industry <p><i>Objectives 5-6 focus primarily on economic issues that need to be addressed in the context of sustainable tourism development.</i></p>
Objective 5.	<p>Stimulate appropriate employment and income-generating opportunities in rural areas</p> <ul style="list-style-type: none"> * Support the participation of village communities in appropriate tourism income-generating activities * Encourage tourism operators to use locally produced goods and services
Objective 6.	<p>Diversify the national income base</p> <ul style="list-style-type: none"> * Create opportunities for increased tourist spending * Encourage local entrepreneurship and initiative in all facets of the tourism industry <p><i>Objectives 7-9 focus primarily on cultural issues that need to be addressed in the context of sustainable tourism development.</i></p>
Objective 7.	<p>Promote appropriate training and education, especially in rural areas</p> <ul style="list-style-type: none"> * Provide and deliver appropriate tourism awareness courses especially to villages where tourism is being developed * Ensure formal tourism training is readily accessible to young people, women and those living in rural areas * Ensure sustainable tourism practises are an integral element in all formal tourism education
Objective 8.	<p>Foster respect for the fa'aSamoa in all tourism activities</p> <ul style="list-style-type: none"> * Develop tourism activities which provide opportunities for learning about the fa'a Samoa * Identify and address potential conflicts between tourism and the fa'a Samoa

Objective 9. Encourage and promote widespread participation and skills in performing arts, crafts and other cultural practices

- * *Take steps to maintain and rejuvenate traditional performing arts and other cultural practices*
- * *Support the development of high quality crafts as well as their potential for income-generation*

Objectives 10-12 focus primarily on tourism product issues that need to be addressed in the context of sustainable tourism development.

Objective 10. Improve the quality of the tourist experience through the upgrading of tourist attraction sites, facilities and services

- * *Support efforts to enhance and safeguard tourist attractions, particularly those of historical and cultural significance*
- * *Seek to up-grade the quality of tourist facilities and services*

Objective 11. Ensure tourism planning and development, is carefully planned and of a scale and form compatible with the natural and cultural environment

- * *Ensure national-level tourism planning is environmentally and culturally appropriate, carefully implemented and monitored, and developed in partnership with stakeholder groups*
- * *Carefully evaluate all applications for new tourism development in terms of their environmental and cultural compatibility*
- * *Take special care to safeguard important sites and landscapes from inappropriate development*

Objective 12. Enhance awareness and adoption of sustainable tourism principles and practices in Samoa

- * *Enhance awareness of government departments, NGOs to sustainable tourism*
- * *Encourage and support the tourism private sector to adopt sustainable tourism practices and technologies in their businesses*

Annex B TABLE OF RESULTS

✓ Acceptable performance ✗ Poor performance ✘✘ Very Poor performance

NO	NAME	RESULT	RANGE	PERFORMANCE	POSSIBLE MANAGEMENT RESPONSE
1a	Village participation in land conservation	26%	50-75%	✗	Encourage participation in conservation as part of road-shows
1b	Tourist participation in nature tourism	8%	20-40%	✘✘	Work with conservation areas and tour guides to improve nature tourism product
2a	Village participation in marine conservation	42%	50-75%	✗	Deliver special tourism training to newly established marine conservation areas
2b	Tourist participation in marine tourism	23%	20-40%	✓	Support the development of marine tourism activities
3a	Hotels using secondary or tertiary waste-water treatment	8%	30-50%	✘✘	Work with DEC to draw up proper regulations for waste-water treatment
3b	Hotels composting their biodegradable waste products	76%	60-80%	✓	Hold workshop for urban hotels on appropriate waste disposal methods
4a	Tourism sites passing SWA water quality tests	50%	70-90%	✗	Work with SWA to improve supply to problem areas
4b	Water usage per guest night in hotels	928 litres	500-1000	✓	Provide hotels with information about water-saving technology
5	Proportion of hotel jobs in rural areas	48%	40-60%	✓	Provide training support for hotels located in rural areas
6a	Proportion of new businesses focused on tourism	4%	10-20%	✗	Hold workshop on tourism investment to discuss key issues and constraints
6b	Contribution for identified tourism businesses to GDP	4%	10-20%	✗	Work with relevant departments to improve monitoring of tourism's economic impact
7a	Coverage of tourism awareness programmes	28%	25-50%	✓	Prioritise villages for future tourism awareness programmes
7b	Hotel staff going on training courses	27%	25-50%	✓	Work with hotels to assess priority training needs
8	Tourism operators providing visitors information about village protocol	72% verbal 17% written	50-70% 30-50%	✓ ✗	Work with tour operators to develop a cultural information sheet for visitors
9a	Proportion of traditional event in Tourism Festivals	50%	50-70%	✓	Encourage the revival of traditional song and dance through tourism festivals
9b	Proportion of handicraft stalls in the markets	21%	20-40%	✓	Liaise with appropriate NGOs to assist handicraft producers target tourism
10	Evaluation of quality of key tourist attraction sites	35%	60-80%	✗	Develop pilot projects and hold training workshops to improve maintenance skills
11a	New hotels undertaking environmental assessment	33%	90-100%	✘✘	Work with DEC to develop criteria for environmental screening
11b	Tourist landscapes under threat	20%	0-5%	✘✘	Urgently investigate damaged sites and attempt restoration
12	Tourism operators adopting sustainable tourism practice	48%	60-80%	✗	Conduct tourism industry workshop on sustainable tourism best practice

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Zita Sefo-Martel
Foisaga Shon
Noumea Simi
Luafatasaga Tu'u'u Dr Ieti Taulealo
Palanitina Toelupe
Foua Toloa
Felise Leulu Vaa*

Participating Hotels

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Betty Moor's Accommodation
Coconuts Beach Club
Hotel Kitano Tusitala
Insel Fehmarn
Le Lagota Beach Bungalows
Manuia Wetlands Resort
Samoan Outrigger Hotel
Pasefika Inn
Safua Hotel
Salani Surf Resort
Samoan Village Resort
Samoana Resort*

*Satuiatua Beach Fales
Savaian Hotel
Seaside Inn
Seipepa Travel Home
Sinalei Reef Resort
Siufaga Beach Resort
Tationo Motel
Teuila Hotel
Tori's Place
Vaiala Beach Cottages
Vaisala Hotel
Valentine Parker's Accommodation*

Participating Tour Operators

Big Island Tours
Eco Tour Samoa Ltd
Island Explorer Kayaks
Island Hopper Vacations
Jane's Tours & Travel
Manono Elderhostel Tours
Oceania Travel & Tours

Pacific Quest Divers
Samoa Marine
Safua Tours
Samoa Scenic Tours
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indicator handbook

a guide to the development and use of Samoa's sustainable tourism indicators

The handbook summarises the lessons learnt from research on the development of sustainable tourism indicators in Samoa. It establishes a set of practical and user-friendly indicators for monitoring sustainable tourism development in the country, and puts in place an implementation framework to facilitate the interpretation of indicator results. Data from the first year of monitoring has already been used to design a sustainable tourism action plan that targets ten specific areas of tourism in Samoa.

This Handbook was primarily designed as a functional tool to assist the Samoa Visitors Bureau in the use and monitoring of the indicators, but it includes step-by-step guidelines for indicator development that may also be of interest to other small island countries, wanting to design their own indicators of sustainable tourism development. The project clearly demonstrates how monitoring not only assists by providing information for decision-making, but can also help in the design and management of sustainable tourism action strategies.



monitoring sustainable tourism
development in samoa



South Pacific Regional
Environment Programme