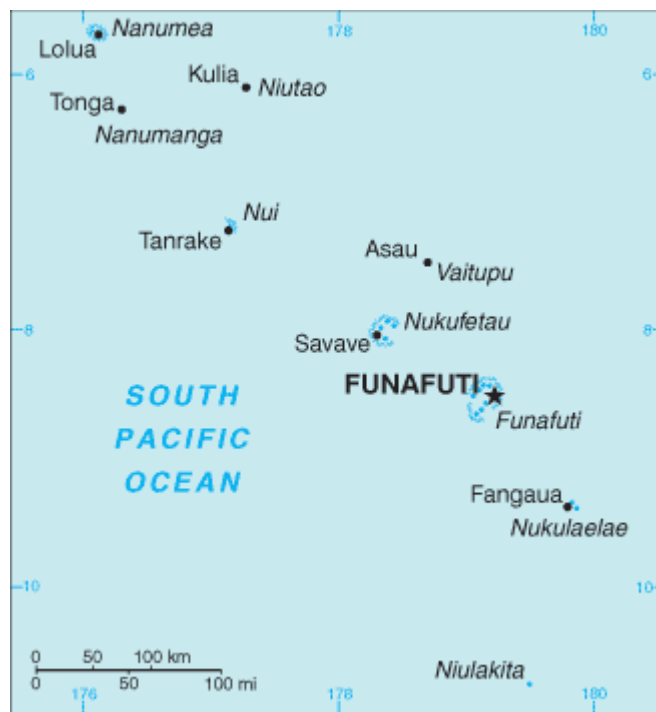


TOURISM SECTOR STUDY

TUVALU



1. ECONOMIC INDICATORS OF TOURISM

1.1 Key Economic Indicators

	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>
Population ('000) ^a	10.5	10.7	9.6	10.2	9.6
Population Growth (%) ^a					
GDP (US\$mn) ^b	13.6	13.4			
GDP Growth (%) ^b	3.0	4.0	2.0	2.0	2.0
GDP/Capita (US\$) ^b	1,302	1,259			
Tourism Contribution to GDP (%) ^c			3.0		
Balance of Visible Trade (US\$mn) ^d			78.0		
Inflation Rate (%) ^b	5.3	1.8	2.6	3.0	3.0
Exchange Rate (US\$1 to Aus \$) ^e	1.71	1.93	1.84		

a – Asian Development Bank Key Indicators 2000-1; Census 2002; Pacific Islands Populations, SPC, 2003-4. The 2002 census figure is below the ADB figure of 10,880 so no comparison can be made between 2001 and 2002; the SPC data for 2003 is a mid-year estimate so cannot be directly compared with either 2002 or 2003. b - Market Information & Analysis Section, Australian Department of Foreign Affairs & Trade, using data from the Australian Bureau of Statistics and various international sources; 2003 subject to revision; 2004 IMF forecast. c – SPTO Regional Tourism Strategy for the South and Central Pacific. d – estimate based on data in CIA World Factbook – Tuvalu. e - Asian Development Bank Key Indicators.

1.2 Balance of Payments

Tuvalu has an extremely limited resource base. The country has no known mineral resources and few exports. Subsistence farming and fishing are the primary economic activities. The nation is a classic MIRAB (**M**igration, **R**emittances, **A**id and **B**ureaucracy) economy – surviving on the basis of migration (largely to New Zealand), remittances (from migrants and seafarers based overseas), aid (largely from New Zealand and Australia, but with substantial contributions from other nations) and a high level of domestic employment in the bureaucracy.

Tuvalu also relies heavily on investment income from the Tuvalu Trust Fund - TTF (valued at Aus\$76mn late in 2003), income from fishing license access fees (estimated at Aus\$6.1mn in 2001), rent from its international telecommunication dial-up code (estimated at Aus\$0.31mn in 2001), and, more recently, its Internet domain license fees for “.tv” (estimated at Aus\$1.6mn in 2001).

Exports from Tuvalu are limited to copra, stamps, handicrafts and garments. Principal import categories comprise: food and live animals; manufactured goods; and machines, transport and equipment. While there is a large imbalance on goods, Tuvalu enjoys a positive overall balance of payments as a result of the income from the other sources noted above.

1.3 Employment

Tuvalu's labour force was estimated to be 7,000 in 2001, the main areas of employment being public service, labour for overseas shipping companies, subsistence agriculture and fishing. There are no large-scale agricultural projects or any local commercial fishing operations. A small number of local contractors are engaged in house construction, road maintenance and other infrastructure projects. Almost all of Tuvalu's requirements are imported and there are several companies involved in importing/wholesaling. Small retail shops are located throughout the islands and these are mostly locally owned. There is only a very limited manufacturing sector in Tuvalu. The main industries are small-scale timber processing (sourced locally or from New Zealand) and handicrafts. About 20 – 30 Tuvaluans are estimated to be working in the tourism industry.

1.4 Construction Costs

Relatively high because of the need to import all building materials.

1.5 Operating Costs

The present biweekly minimum wage in the public sector is US\$67.60 (i.e. Aus\$130). The private sector adopts the same minimum wage rate. The costs of importation result in fuel prices being significantly above the average for the South Pacific at US\$0.90 for both motor gasoline and diesel (end 2003 prices).

1.6 Local Skills Base

While there is a plentiful supply of unskilled labour in Tuvalu there are shortages of semi-skilled, skilled and managerial workers. Permits are granted to investors involved in any project and for expatriate personnel where comparable local staff is unavailable. In most of

the accommodation facilities management skills and entrepreneurial expertise are poor because of insufficient training. The low level of hotel management and supervisory skills available in the country means that little on-the-job training takes place. There is no specific technical training facility or courses on offer in tourism or hospitality.

1.7 Infrastructure and Services

Air and Sea Access

An international airport is located on the main island of Funafuti, with twice-weekly services to and from Suva (Fiji) operated by Air Fiji, in which the Government acquired a share in 2001 in order to give itself greater control of its airline access. Present service using an Embraer Brasilia EM2 30-passenger aircraft is:

Suva/Funafuti/Suva: Monday and Thursday

The airport cannot handle 737 jet aircraft and the freight capacity on the aircraft used by Air Fiji is limited. In the recent past the Government of Tuvalu upgraded the airport and runway. The main airport fails to meet international standards for safety in a number of areas: it has no navigation aids, its fire service cover is inconsistent, and there is no runway lighting or perimeter security. Potentially this could result in negative grading by an outside agency such as International Civil Aviation Organisation (ICAO) and will act as a detriment to future services by potential carriers. The airport has limited capacity for handling baggage, with no automatic conveyor system in place.

There is no internal air service. The only way to travel between the islands is by sea. The Nivaga II and the Manufolau are the two vessels used for the transport of both people and cargo. While a sailing schedule is provided every year it is rarely adhered to, thus creating difficulties for visitors with time commitments. In effect the lack of reliable and timetabled sea transport makes it impossible for tourism to develop on the outer islands.

There are two established ports in Tuvalu, located in Funafuti and Nukufetau. The main port in Funafuti is capable of handling 20-foot containers. The international shipping services are limited to monthly calls by two companies, Oceanlink and Pacific Direct Line. Shipping services also operate between the various islands but the services to the smaller areas are not always reliable.

Telecommunications and Information Technology

Concerning telephone services, international direct dialling (IDD) is available. Tuvalu has recently acquired satellite communications technology and international phone calls can be made from most of the islands. Fax is available at the Telecommunication Centre in Funafuti and in hotels. Internet is available but access limited.

Utilities

Electricity is 240 volts AC, 60Hz but available in the capital Funafuti only. The government has launched a major electrification project on all the remote islands, while last year it assisted the Tuvalu Electricity Corporation (the only power supplier in the country) in purchasing a new generator to improve the current overloaded electricity supply on the main land.

Water is both in short supply and undrinkable (without prior boiling) in its untreated state unless from rain storage tanks. The government is renovating and expanding the system of water catchment and storage, and recently installed a new desalination plant to improve supply.

Roads

A tar-sealed road in good condition exists on Funafuti; other roads are unsealed and are difficult to traverse in wet weather. Signage is poor.

2. TOURISM STATUS AND TRENDS

2.1 The Tourism Offer

Tuvalu's strengths as a tourism destination are:

- Its smallness and isolation, and the setting of typical tropical islets in the beautiful Funafuti lagoon are Tuvalu's main features and are considered to be the potential tourist attractions (within the limits of the overall carrying capacity of the sensitive environment and infrastructure limitations).
- Visitors coming to the islands can enjoy the peaceful atmosphere and palm-fringed beaches - truly "off the beaten track of international travel".
- The Tuvalu people have an open, respectful relationship with visitors.

Offsetting this is the threat to the country's frail environment from global warming and the difficulties in disposing of waste generated by the country's population. There are no officially-designated landfill areas with the result that the northern end of the main island has become a dumping zone marring its attractiveness and leading to issues of leaching and run-off.

Most tourist activity is centred in the capital, Funafuti, where the greatest attraction is the enormous Funafuti Lagoon - 14km (9 miles) wide by 18km (11 miles) long – which offers high quality **swimming and snorkelling** though there few sandy beach areas. The second most populated island in the atoll – which does offer white sand beaches - is Funafala, which can be visited on the Funafuti Island Council's catamaran.

Tourists interested in **water-sports** need to bring their own equipment, as there is little for hire. A limited amount of diving and game fishing equipment is available in Funafuti through the Island Council but it is difficult to access this equipment at short notice.

A **Marine Conservation Area** (MCA) has been created with the assistance of the South Pacific Regional Environment Programme. This 32 sq. km (12 sq. miles) area is now a protected marine park. Containing six uninhabited islets, the conservation area is teeming with varieties of tropical fish and also provides nesting areas for sea birds and turtles. Visitors can take a chartered boat to the area – at a cost of approximately Aus\$50 per person (depending on the number of people travelling). A small kayak operation has also recently been started to allow visitors the chance to explore the lagoon.

Dancing, singing and music play a big part in Tuvaluan culture, especially during the popular "feasts of fatele". During a traditional celebration, visitors are welcomed and encouraged to join in the festivities.

Accommodation

The South Pacific Tourism Organisation (SPTO) reports that Tuvalu has 15 tourist accommodation operations with a total room capacity of just 75. The 12-room, three-star, Government-owned Vaiaku Lagi Hotel is the largest of these, catering primarily for visiting business and government officials. The hotel is situated only 50m from the airport and adjacent to the new government office building that is due for completion in mid-2004.

Three other guesthouses provide accommodation, with room numbers varying from 3 to 5. Two are within easy reach of the airport and tend to cater to business visitors when the hotel is full to capacity or to the small number of tourists that visit the country. The quality of guesthouse accommodation is not high. In some cases rooms are leased out on a long-term basis. Each of the outer islands has houses available to cater for government/business visitors.

There is no system of accommodation classification or quality control in Tuvalu. This can result in inconsistent standards and pricing.

The range of restaurants is very limited. In addition to the Vaiaku Lagi Hotel, there are only two restaurants, though there are also a small number of other snack bars, which are only open during the day. The standard of catering is basic.

A limited range of shops, including food and clothing outlets, is available, on Funafuti. The range of merchandise is basic and not designed with the visitor in mind. There are no shops on Funafala and the outer islands have simple outlets for provisions.

For local crafts, including Tuvalu weaving, shell jewellery and the traditional lidded wooden boxes (*tulumas*) used by fishermen, there is the *Women's Handicraft Centre* near the main hotel. There is no duty free outlet in the country.

2.2 Market Trends

The total number of tourists arriving in Tuvalu reached almost 1,500 in 2003, a considerable rise over the previous two years. Growth in absolute numbers has, however, been small in comparison to other Pacific destinations. It is difficult to determine any major trend as the holding of a single small conference or event can dramatically alter the figures.

The tourism industry depends heavily on business/government related travel and also on Tuvaluans and others returning to visit friends and relatives. The actual number of bona fide holiday/vacation visitors is extremely low (fewer than 200) and has shown no real growth in recent years.

The major market for visitors is Fiji - the location of the offices of the many aid agencies and organisations that visit Tuvalu, as well as being the base of the University of the South Pacific which has a small satellite campus on Funafuti. Japan and the USA were the major source of holiday visitors during 2003 however data do not exist in sufficient accuracy to allow comparisons with earlier time periods.

COUNTRY	Holiday/ Vacation	Business/ Govt	Friends/ Relatives	Transit	Other	Total
Australia	13	106	25	7	22	173
New Zealand	10	84	17	5	6	122
Fiji	19	242	102	1	54	418
Other Pacific	12	108	125	21	15	281
USA	47	16	7	21	8	99
Canada	5	8	0	1	2	16
UK	3	14	6	0	2	25
Germany	6	2	0	0	1	9
France	2	2	0	0	0	4
Other Europe	16	7	4	1	6	34
Japan	53	87	0	108	0	248
Other Asia	3	39	6	0	4	52
Other Countries	6	2	0	3	4	15
Total	195	717	292	168	124	1,496

Occupancy and Seasonality

No official data exist on occupancy levels though the Vaiaku Lagi Hotel enjoys a relatively high occupancy rate of between 40 and 60% over the course of the year. It is difficult to discern any distinct seasonal pattern to the arrival figures. December is the one month to consistently see high arrivals figures – reflecting the return home by many Tuvaluans to see friends and relatives.

Estimates of Expenditure

No official data exist on tourist expenditure in Tuvalu.

3. INVESTMENT OPPORTUNITIES IN TOURISM

Currently tourism plays a very minor role in the economic life of Tuvalu. Nevertheless Tuvalu recognizes tourism as a viable means of accelerating the economic growth and development of the nation through its contribution to foreign exchange earnings and stabilization of the balance of payments, as well as its capacity to create income and employment opportunity.

The 2004 Draft Tourism Policy is defined by the following objectives:

- Tourism development should contribute to the achievement of the overall national goals, by being integrated into the overall national development plans and programmes in order to ensure harmonious growth.
- Tourism development should be based on the principles of sustainable development and incorporate the integration of economic, social and environmental benefits for Tuvalu.

- The national attributes and inherent natural (the marine environment) and the socio-cultural attractions (the traditional Polynesian cultural features) of the country provide the basis for small scale, low impact tourism development.
- Identify measures that may be required in order to improve the effectiveness of the tourism sector in Tuvalu and to increase its overall contribution to the economic and social development of the country.

38 initiatives are identified in the Policy:

ENVIRONMENTAL REGULATIONS
1. Forbid the dumping of waste into the lagoon, and ensure environmental protection by introducing strict regulations, laws.
2. Introduce "Operation Clean Up" actions like competitions, educational campaigns and additional funds for rubbish collection, deposit etc.
3. Produce publicity leaflet to promote the Marine Conservation
4. Initiate a public education programme on the need for resource conservation " Keep Tuvalu Beautiful" Awareness Project
5. Designate a site to dump obsolete equipment ranging from old furniture, office equipment, motor vehicles etc.
6. Place attractively painted " oil' drums placed outside high litter zones
7. Increase the frequency of rubbish collection and introduce a road sweeping programme
8. Introduce re-cycle initiatives like a 5 cent can refunded deposit
HR DEVELOPMENT & TRAINING
9. Undertake tourism training for the Tourism Office on tourism planning and development (small resort development), tourism organisation and tourism marketing, through short overseas training programmes and attachments within the region.
10. Improvement of the knowledge among Government officials involved, about the tourism phenomenon, tourism development, and tourism marketing and information.
11. Restructure and prepare a business and marketing plan for the Tourism Office
12. Develop a Tourism Awareness program aimed at increasing understanding and support for tourism development among key stakeholders
13. Provide courses to the private sector on business management and tourism marketing
14. Encourage operator attachments overseas by publicizing available sources of funds i.e. Forum Secretariat, CDE
15. Provide operational/hospitality training for accommodation and restaurant staff and customer service training for officials involved in tourism.
INDUSTRY ORGANISATION
16. Prepare Articles of Association and establish a Tuvalu Tourism Association to represent the private sector tourism operators
17. Form a Tourism Development Committee (including high level Government officials and members of the private sector) to oversee the implementation of the Tourism Action Plan
18. Provide low cost financing and/or grant aid and technical assistance to assist in the start up of viable tourism businesses

19. Identify and quantify investment opportunities in Tuvalu, including potential privatisation opportunities.
20. Develop an accommodation classification scheme consistent with regional standards and Codes of Practice for industry operators to improve quality standards.
21. Provide tax incentives for tourism operators to upgrade their products and to encourage inward investment in the tourism sector.
22. Create more sales opportunities for handicrafts and souvenirs to increase revenues from the existing tourist flows
23. Encourage one or more local fisherman to offer weekly departures for sea angling, and upgrade standards of sea safety
24. Develop of organized excursions to other islands, as a first inbound tour operating activity
25. Encourage the establishment of a small scale diving operation, sailing boats for hire and overnight kayaking operator
TRANSPORT & INFRASTRUCTURE
26. Implement an adequate program of directional signage by creating a signage development program to position the key junctions and informational signs outside.
27. Seek funding to upgrade the airport in Funafuti to allow for night time operations, the provision of acceptable navigation aids consistent fire service attendance and improved perimeter security
28. Provide a visitor information office in a prominent location
DESTINATION MARKETING
29. Develop a Destinalional Marketing Plan for Tuvalu and allocate adequate resources for implementation. Incorporate into the Plan: <ul style="list-style-type: none"> • A clear image of Tuvalu in potential markets. • Implement production of a new corporate image and collateral material • Select a market segmentation method, to establish a position in the targeted visitors "mind"
30. Identify potential wholesalers and distribute commissionable packages/product through them and support with marketing funds.
31. Continue to work with SPTO to develop and establish a dedicated website for tourism to Tuvalu. Allocate resources for maintenance of the site.
32. Produce a small "cruising guide" to increase the number of yachts visiting Funafuti
33. Produce an accommodation guide (using cooperative contributions in part from private sector)
34. Develop a database of travel guides books and publications and send them regular product updates and press releases.
35. Develop a series of posters for use by agents and at travel shows.
36. Create a promotional brochure to give an overview of all product suppliers and a listing of local festivals, events and activities
37. Develop a database of travel agents and wholesalers who express an interest in Tuvalu and send them information and maintain regular contact with them.
38. Review the pricing of air tickets to Tuvalu with a view to creating net fares for wholesaler distribution or add on fares for international tourists

Accommodation

The facilities and services of the Vaiaiku Lagi Hotel need to be upgraded: one potential way to achieve this would be for the Government to sell or lease the hotel to a private investor. Discussions with the manager and members of the Board of Directors have revealed interest in attracting partnerships in the development of a new hotel wing and in improving the general facilities of the Hotel. The type of partnership that could be entered into could be direct equity investment or also a management/marketing agreement. Some interest has already been shown by a Fijian-based hotel chain. There are also plans to expand and develop facilities in some of the smaller guesthouses. These are small-scale developments that are likely to be of limited interest to offshore investors.

Marine Conservation Area/Water Activities

This is the major potential attraction for most visitors to Tuvalu. It provides an off shore/motu experience without need to rely on the long and unreliable trips to the outer islands. At present the Island Council provides a relatively small motor-boat for visitors and can also provide a 'picnic' type meal for a visit to one of the islands that lie just outside the MCA. There is also a small kayak operation, which offers trips to some of the 'motus' on the lagoon. There is real potential for investment in these activities in terms of overseas marketing, improvements to equipment and the provision of additional activities for visitors (for example diving). Some equity involvement could emerge but it is more likely that marketing/technical assistance will be demanded. There is also interest in attracting a well-qualified dive master and related dive shop.

Cultural Experiences

There may be some interest in developing a small-scale cultural experience on one of the smaller and more accessible 'motus' in Funafuti lagoon – most notably Funafala. Such a development would require the construction of a small number of traditional accommodation units for a maximum one-night stay, the development of some facilities for meals, and coordination with the local community to provide a "product" that is based around creating a greater understanding of Tuvaluan culture and everyday way-of-life.

Outer Island Development

There is some interest in developing tourism products on the outer islands, though the unreliability of the shipping schedule and the general lack of tourist facilities makes such development very difficult at the present time.

Cruise Ship

A small number of cruise ships (2-3) visit Funafuti every year. At present there is little for cruise visitors to do when they reach the island and little coordinated effort to provide a product/experience for them to consume. One possibility could be to link several operators in the transport, tour and restaurant sub-sectors with local communities to create a stronger product for cruise visitors. There is likely to be demand for partnership in marketing these services to the cruise-ship sector and increasing awareness of the product. There could also be potential for investment in and/or management of the product.

4. OPERATING ENVIRONMENT FOR TOURISM INVESTMENT

4.1 Investment Framework

The Government welcomes foreign investment, recognizing the substantial contribution it can continue to make to the development of Tuvalu's industries and resources. The stated purpose of the Foreign Direct Investment Act 1996 is to provide a legal framework in Tuvalu to encourage, facilitate, consolidate and streamline direct foreign investment proposals.

Foreign investment proposals are dealt with on a case-by-case basis with the Government generally being accommodating regarding the terms and conditions under which overseas firms can operate. The only restriction is the availability of land that can only be leased by non-natives, and then only with the approval of the Minister of Natural Resources. Approval to repatriate profits under the Foreign Currency Act is required from the Secretary of Finance.

Taxation of foreign resident companies is 40 percent on net profit. Personal income tax is levied at a flat rate of 30 percent with a tax-free threshold of US\$2,220. Company tax rates on all chargeable income are also set at 30 percent. Non-resident individuals are taxed at a flat rate of 40 percent of income. A variety of sales taxes are applied to different goods and services. Most capital items, including plant, machinery and vehicles for newly established businesses, are exempted from duty upon application. All building materials are imported duty free.

4.2 Incentives Regime

No specific or fixed set of incentives currently exists for investment. In most instances incentives are granted on a case-by-case basis. Certain types of industries, including tourism, qualify for 'pioneer status', which gives them the opportunity of applying for tax exemptions. Under this category, the Minister of Finance can, at his discretion, grant exemption on tax for any concession period. Incentives are currently being reviewed to make them more attractive.

The Tuvalu Government offers the following guarantees to foreign investors who establish themselves in Tuvalu. There will be no nationalization except:

- In accordance with law;
- For a public purpose defined by law; and
- With payment of compensation as defined by law.

The Government also provides guarantees relating to repatriation and conversion of earnings.

4.3 Access to Finance

There is one commercial bank in the country – the National Bank of Tuvalu. It provides a comprehensive range of personal, business and international services. The Development Bank of Tuvalu provides finance for commercially-viable business ventures at concessional rates.

Tuvalu uses Australian currency. Credit cards are not accepted nor can they be used at the National Bank of Tuvalu for cash advances. All money must be brought in by the visitor.

International Financial Institutions

Tuvalu as a signatory to the Cotonou Agreement has access to the facilities of the European Investment Bank (EIB). As a member of the World Bank, the facilities of the International Finance Corporation (IFC) would be available for projects in this country.

APPENDIX ONE: INVENTORY OF TOURISM ENTERPRISES

Accommodation

- Vaiaku Lagi Hotel – 3 star accommodation/50m from airport/Restaurant.
- Filamona Lodge – 20 metres south of the airport/restaurant
- Su's Place - self-contained, self-catering unit with A/C

Each of the above feature restaurant meals.

Other tourist resources

- Tourist Office
- Travel Office
- Telecom Exchange
- Post Office
- Hospital
- National Bank
- Development Bank
- Kaupule Funafuti (local government, manages the Marine Conservation Area)
- University of the South Pacific Centre
- Women's Handicraft Centre
- A small number of bars/dance areas exist and usually operate on Fridays and Saturday nights

APPENDIX TWO: INTERNET RESOURCES ON TUVALU

National Tourism Office, Ministry of Tourism, Trade & Commerce

Private Mail Bag, Vaiaku, Funafuti, Tuvalu
Mr. Fakaso Tealei

Position: Tourism Officer

Phone: (688) 20188

Fax: (688) 20829

Email: fakaso@yahoo.com

Website: www.tuvalu.tv

Government information

www.countryreports.org

www.embassy-avenue.jp/tuvalu/index.html

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<http://www.forumsec.org.fj/docs/IG/Tourism%20Guide%20Sydney.pdf>

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<http://www.spto.org/invest/tuvalu.shtml>

<http://www.forumsec.org.fj/docs/IG/Tourism%20Guide%20Sydney.pdf>

Redefining tourism as an export and development opportunity (2004)

http://www.intracen.org/execforum/ef2004/Trinidad_Tobago/TT-04-Tuvalu.pdf

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Geography, People, Government, Economy, Principal Government Officials, political

<http://www.state.gov/r/pa/ei/bgn/16479.htm>

Tourism attractions, tourism accommodation, tour operators

<http://www.pacific-travel-guides.com/tuvalu-islands/index.html>

<http://www.spto.org/sitemap.shtml>

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<http://www.pacificislandtravel.com/grouptours.html>