



MINISTRY OF INDUSTRY, TRADE & TOURISM

2015 INTERNATIONAL VISITOR SURVEY REPORT

REPUBLIC OF FIJI

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Image Courtesy: Tourism Fiji & Film Fiji

Prepared by Ministry of Industry, Trade and Tourism in consultation with StolzNow Research

FOREWORD BY THE HONOURABLE MINISTER



The Tourism Industry is the largest contributor to the Fijian economy. It represents 30 percent of the Gross Domestic Product (GDP), earning larger foreign revenue than export from trade in goods.

The economic benefits from tourism is the main driving force for tourism development. Therefore, in order for Fiji to provide the best service and continue to expand the range of services and products for its international visitors, it is vital that the industry and the Fijian Government understand its international visitors and their changing needs.

In this regard, tourism research and data collection plays a very important role in ensuring that Fiji remains competitive in the global tourism industry.

The International Visitor Survey provides an avenue for policy makers and the industry to understand today's visitor needs and trends and forecast for the future. The Survey is a vital tool for

better planning and resource allocation for both the public and private sector.

The overall plan for the tourism industry, that is, the Fijian Tourism 2021, specifically mentions the need for timely and accurate tourism data and the International Visitor Survey is a very important component of tourism research and data collection.

The Fijian Tourism 2021 identifies specific strategies that will lead to a modernised International Visitor Survey that is able to provide quarterly reports and information for improved planning and decision making. In addition, we will expand the Survey to cover both the international airports and all the sea ports for cruise data.

The 2015 International Visitor Survey Report provides a comprehensive view of the international visitor trends and we hope that the industry and stakeholders will find the information valuable.



Hon. Faiyaz Siddiq Koya
Minister for Industry, Trade and Tourism

STATEMENT BY THE PERMANENT SECRETARY



The Ministry of Industry, Trade and Tourism publishes the International Visitor Survey annually. The International Visitor Survey or commonly known as IVS provides comprehensive information on international visitors to Fiji.

The 2015 IVS Report provides, both a qualitative and quantitative assessment of international visitors to Fiji. The Report gives key information and data, which includes visitor numbers and main reason for visit, visitor demographics, number of nights spent in Fiji, method of travel arrangements, expenditure patterns and visitors' impression of Fiji.

The information is collected through a survey questionnaire, which covers a sample size of 4,000 departing visitors from the Nadi International Airport.

The IVS Report is a useful tool for effective policy formulation, business decision making and to assist efforts in improving the quality of tourism services. For example, the expenditure portion of the IVS Report will assist in the determination of the total

visitor expenditure, which is a key component in the Balance of Payment of calculation.

The Report also provides the Fijian Government and tourism industry with the latest trends in visitor preference and to monitor changing visitor behaviour patterns over time, in order to respond with sound policy, infrastructure development plans and business decisions.

Hence, it was important that the information and data in the Report was verified and confirmed by the tourism industry stakeholders. The Report has gone through consultations with all key stakeholders, both public and private.

In this regard, I wish to acknowledge the support and contribution of all stakeholders, who have assisted in finalising the 2015 IVS Report.

In addition, I thank all the departing visitors, who had taken their time out to participate in the survey.

A handwritten signature in black ink, appearing to read 'Shaheen Ali'.

Shaheen Ali
Permanent Secretary for Industry, Trade and Tourism



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1 INTRODUCTION

The 2015 International Visitor Survey Report (IVS) provides a summary of key statistics and information to help improve the quality of tourism services and enhance development of tourism products in Fiji. These indicators will also help ascertain visitor preferences and experiences overtime to better position the Fijian Tourism industry in meeting these changes in the long run.

The purpose of this survey is to provide Government policy makers and key tourism stakeholders with timely, comprehensive and accurate information on the characteristics, preferences and expectations of our visitors.

In reading this Report, it is important to note that visitors are of different types and generally travel to Fiji for different reasons. Much of the data relates to recreational visitors, but also includes those travelling for other reasons such as business, visiting friends and relatives and education and training.

In terms of limitations, an IVS only records the behaviour and spend of visitors in Fiji. Apart from shopping that has taken place in the airport terminal, spend does not include airfare and revenue from Nadi International Airport.

This Report includes expenditure figures for both, those who have paid for travel directly to Fiji (direct bookings/no bookings) and those who have travelled to Fiji on a 'package' purchased through a travel agent. The methodology used to identify package spend that does not occur in Fiji can be found in section 11.9 of the Report.

There is also a large number of visitors who are not part of the tourism sector but also generate income significant to the Fijian economy. The findings allow Government and the industry to also understand the contribution of these visitors to the economy and how these niche markets can be developed.

This Report is an essential tool for understanding visitor behaviour, choices and spending patterns for both Government and stakeholders. The tourism industry is a large source of revenue for Fiji and data in this Report will allow the industry to understand the market and plan for the future, as well as, assist Government in developing the tourism sector sustainably, at a national level.

This Report has been prepared by the Ministry of Industry, Trade and Tourism (MITT), in consultation with StollzNow Research.



2 KEY FINDINGS

Total visitors

For the year ending December 2015, a total of 754,835 visitors were recorded by the Fiji Bureau of Statistics (FBOS). Of these arrival numbers, the main source markets include Australia (49%), New Zealand (18%), USA (9%) and Pacific Islands (6%).

Data collected by FBOS mirrors the findings of the IVS i.e. Australia (47%), New Zealand (17%), USA (6%) and Pacific Islands (12%) are reported as the major source markets. In the IVS, Pacific Islands show a higher market percentage when compared to that of FBOS as the IVS Report records transit passengers.

Province and Tourism Areas visited

The top two Provinces visited are Ba (60%) and Nadroga/Navosa (47%). These figures add to more than one hundred percent as visitors on average went to 1.29 Provinces.

The top Tourism Areas visited are Denarau (32%), Nadi (28%), Coral Coast (26%) and Mamanuca (20%). Visitors on average went to 1.41 Tourism Areas.

Main reason for visiting and main reason for holiday/vacation

The main reason for visiting Fiji was for a 'holiday/vacation' (79%). Of this group, the main reason for a holiday/vacation was 'rest and relaxation' (84%). Niche markets include 'honeymoon' (6%), and 'wedding' (6%).

It should be noted that many 'holiday/vacation' visitors also carry out activities such as scuba diving.

Backpackers

Self-identified backpackers are eight percent (8%) of all visitors. In 2015, there were approximately 58,612 backpackers. This group mostly come from United Kingdom (47%), Continental Europe (38%) and Canada (22%).

Main destination

Fiji was the main destination for eighty-three percent (83%) of visitors. Fiji is not the main destination for visitors from Continental Europe (65%), United Kingdom (64%) and Canada (51%).

Previous visits to Fiji

Forty-one percent (41%) of visitors have previously visited Fiji. Those most likely to have made a previous visit are from Pacific Islands (74%), New Zealand (53%) and Australia (43%).

Including the visit when the interview was completed, those from Pacific Islands have made an average of 6.7 visits, New Zealand 4.2 visits and Australia 3.1 visits.

Expectations of a visit to Fiji and recommendation

Seventy-nine percent (79%) of first time visitors found their visit to be either 'more enjoyable' or 'much more enjoyable' than expected.

Eighty-two percent (82%) of visitors are highly likely to recommend Fiji as a place to visit to others. Fiji has a Net Promoter Score of 80.0.

Favourable and unfavourable impressions

The most favourable impressions are 'the people' (81%) and 'hospitality' (73%).

Most people (66%) did not have any unfavourable impression with the only significant unfavourable impression being 'too expensive' (8%) and 'insects & bugs' (4%).

'Good food' was a favourable impression by sixteen percent (16%) of visitors while 'quality of food/variety of food' was an unfavourable impression by three percent (3%) of visitors.

Average length of stay

The average length of stay was 10.1 nights making a total of 7,605,590 visitor nights.

The shortest average length of stay is in Denarau (7.1 nights) and the longest average stay is in Suva (21.6 nights).

Room density

Average room density is 2.0 people. This has the most variation by 'main reason for visit', with 'holiday/vacation' having a room density of 2.2 people and 'business' a room density of 1.2 people.

Travelling group

The most common travelling group is 'couple/ partners/ husband and wife' (39%) followed by 'self only' (30%), 'families including one parent with children' (17%) and 'friends' (7%).

Gender

Gender has a slight skew to females (54%) over males (46%).



2 KEY FINDINGS

Age of visitors

The largest group of visitors are in the age range of 20 to 29 years (24%) with a slight decrease in percentage as age increases. Those 60 years and over are eleven percent (11%) of visitors. Children under 13 years are nine percent (9%) of visitors. The lowest group of visitors are aged 13 to 19 years (7%).

Method of booking accommodation

The primary method of booking accommodation is through a travel agent (51%) while many also prefer to book directly with hotels through phone calls, email or online (37%).

Satisfaction with accommodation

Satisfaction with accommodation is high for 'courtesy of staff' (75%), 'cleanliness of rooms' (70%), 'accommodation facilities in general' (67%), 'efficiency of staff' (65%), 'value for money' (58%) and 'quality of food' (52%).

Activities

Key activities for visitors are:

- Swimming – salt water (39%)
- Beach walking (33%)
- Snorkelling (32%)
- Swimming – fresh water (29%)
- Massage/spa (29%)
- Laying on the beach (28%)
- Shopping (20%)
- Kava drinking/ceremony (15%)
- Laying on poolside (14%)
- Walking (14%)
- Village visit/tour (11%)
- Canoeing/kayaking (10%)
- Scuba diving (8%)

Retail purchases

Seventy-six percent (76%) of visitors made retail purchases in Fiji. High satisfaction was noted for:

- Presentation of shops (55%)
- Attitude of shopkeepers (55%)
- Range of products and brands (36%)
- Value for money (34%)

Items most commonly purchased were:

- Souvenirs (32%)
- Clothing (18%)
- Foodstuffs (18%)
- Alcohol (9%)
- Locally made handicrafts (6%)
- Perfume (4%)
- Jewellery (4%)
- Shoes/sandals (3%)

Public transport

Forty-three percent (43%) of visitors used public transport while in Fiji. Of this group, seventy-five percent (75%) used taxis, forty-eight percent (48%) used a bus and five percent (5%) used a mini-bus.

Organised Cruises and Road Tours in Fiji

Twenty-three percent (23%) of visitors took an organised cruise while nine percent (9%) took a road tour.

Most organised cruises were in Mamanuca (77%) and usually took one day (85%).

Most organised road tours were in the Coral Coast (53%) and were more likely to be 'sightseeing/scenic' (67%) or 'village/cultural' (27%) tours.



3 APPROACH, METHODOLOGY AND SAMPLE

3.1 Data collection

The data for the 2015 IVS Report was collected at the Nadi International Airport departure lounge with departing visitors using two methodologies:

- By a paper-based survey which was then entered into an electronic form; and
- Electronic form via tablets.

Interviews were carried out for all days of the year and covered all departing flights. Cruise visitors and international departures at Nausori International Airport are not included in this Report.

3.2 Sample

The sample was chosen by a random selection approach. Validation with visitor arrival data produced by FBOS shows that this approach delivers the correct sample of visitors by country of origin and purpose of visit. The IVS uses additional categories to those collected by FBOS for visitor arrivals by purpose of visit, therefore, some are not directly comparable.

A sample size of 4,123 gives a confidence level of ± 1.52% at the 95% confidence interval.

3.3 Discrepancy in spend

Due to issues with data collection by paper, there are varying base sizes in questions. All base sizes are noted in charts and tables to allow for transparency.

Spend data projected to all visitors is described as 'estimated spend', highlighting that there can be errors in projecting the sample collected to all visitors. Small differences in data collected can have a large effect on the estimated spend when projected.

There are issues with spend in accommodation when analysed by Province and Tourism Area as seven percent (7%) of research participants could not be allocated a category.

3.4 Analysis

3.4.1 Confidence level

Differences are reported when they are statistically significant at the 95% confidence level.

Tabled data is coloured blue or red where blue signifies that the differences are statistically above the average and red is below the average. Black text means that the data is on average.

Analysis is carried out by cross-tabulation by the following key forms:

- Province
- Tourism Area
- Country and region of residence
- Main reason for visiting Fiji
- Main reason for 'holiday/vacation'

Classification by Province and Tourism Area depends on the location of the paid accommodation. However, seven percent (7%) could not be allocated into a Province and Tourism Area as research participants did not specify the location of their non-paid accommodation.

3.5 Tourism Area grouping and Base Sizes

Due to small base sizes, Tourism Areas have been condensed as shown in the table below to make analysis practical.

Tourism Area grouping

| Tourism Area | Group Name | Tourism Area | Group Name |
|-------------------------------|-----------------------------|-------------------------------|-----------------------------|
| Denarau | Denarau | Rakiraki/Islands off Rakiraki | Suncoast |
| Coral Coast | Coral Coast | Beqa | Pacific Harbour/Beqa/Kadavu |
| Nadi | Nadi | Lomaiviti | Outer Islands |
| Mamanuca Islands | Mamanuca | Nausori/Tailevu | Suva |
| Yasawa Islands | Yasawa | Kadavu | Pacific Harbour/Beqa/Kadavu |
| Suva | Suva | Labasa/Islands off Labasa | Vanua Levu |
| Lautoka/Islands of Lautoka | Lautoka | Levuka | Outer Islands |
| Deuba/Pacific Harbour | Pacific Harbour/Beqa/Kadavu | Ba/Tavua | Suncoast |
| Taveuni/Islands off Taveuni | Vanua Levu | Lau | Outer Islands |
| Savusavu/Islands off Savusavu | Vanua Levu | | |

3.5.1 Base Sizes

Table 1: Province (condensed)

| | % | n |
|-----------------|-----|------|
| NET | 100 | 3923 |
| Ba | 60 | 2344 |
| Nadroga/Navosa | 47 | 1825 |
| Rewa | 8 | 296 |
| Cakaudrove | 3 | 133 |
| Serua | 3 | 116 |
| Other Provinces | 2 | 96 |
| Unspecified | 7 | 268 |

Table 2: Tourism Area (condensed)

| | % | n |
|-----------------------------|-----|------|
| NET | 100 | 3923 |
| Denarau | 32 | 1262 |
| Nadi | 28 | 1118 |
| Coral Coast | 26 | 1020 |
| Mamanuca | 20 | 782 |
| Yasawa | 9 | 358 |
| Suva | 7 | 265 |
| Lautoka | 4 | 172 |
| Pacific Harbour/Beqa/Kadavu | 4 | 158 |
| Vanua Levu | 3 | 125 |
| Suncoast | 1 | 55 |
| Outer Islands/Unspecified | 7 | 257 |

Table 3: Country and region of residence

| | % | n |
|--------------------|-----|------|
| NET | 100 | 4109 |
| Australia | 47 | 1940 |
| New Zealand | 17 | 706 |
| Pacific Islands | 12 | 477 |
| Continental Europe | 7 | 271 |
| USA | 6 | 227 |
| United Kingdom | 5 | 192 |
| Other areas | 3 | 105 |
| China | 2 | 97 |
| Canada | 1 | 50 |
| Japan | 1 | 44 |

**Table 4: Main reason for visit**

| | % | n |
|----------------------------|-----|------|
| NET | 100 | 4103 |
| Holiday/vacation | 79 | 3223 |
| Transit | 5 | 219 |
| Business | 5 | 199 |
| Conference/convention | 4 | 159 |
| Visiting friends/relatives | 4 | 154 |
| Education/training | 2 | 76 |
| Volunteer | 1 | 36 |
| Other | 1 | 37 |

Table 5: Main reason for holiday/vacation

| | % | n |
|---------------------|-----|------|
| NET | 100 | 3202 |
| Rest and relaxation | 84 | 2674 |
| Honeymoon | 6 | 207 |
| Wedding | 6 | 186 |
| Other | 4 | 135 |

3.5.2 FBOS data for comparison

The 2015 arrival statistics produced by FBOS use slightly different categories but are similar to the IVS findings. The difference in some categories means that it may not be possible to make a direct comparison, however, overall the IVS and FBOS data are in close alignment showing that IVS data is robust and reliable.

Table 6: FBOS 2015 Main reason for visiting Fiji

| | FBOS (%) |
|----------------------------|----------|
| Holiday | 79 |
| Others | 9 |
| Visiting Friends/Relatives | 6 |
| Business | 3 |
| Official Conference | 2 |
| Education/Training | 1 |

Source: FBOS

The table above compares to Table 4 of section 3.5.1. Differences in data collation for FBOS are:

- Transit passengers who do not leave the Nadi International Airport and do not complete an arrival card are not included in the overall FBOS figures.
- FBOS uses 'official conference' while IVS uses 'conference/convention'.
- FBOS uses 'holiday' while IVS uses 'holiday/vacation'.
- IVS also uses 'volunteer', 'sport' and 'church' which are shown under 'others' in FBOS.

Table 7: Comparison of percentage of visitors by country/region FBOS vs IVS

| | FBOS (%) | IVS (%) |
|--------------------|-----------------|----------------|
| Australia | 49 | 47 |
| New Zealand | 18 | 17 |
| USA | 9 | 6 |
| Canada | 2 | 1 |
| United Kingdom | 2 | 5 |
| Continental Europe | 4 | 7 |
| Japan | 1 | 1 |
| Pacific Islands | 6 | 12 |
| China | 5 | 2 |
| Others | 4 | 3 |

Source: FBOS and IVS

Countries that are reported by FBOS and not reflected in the IVS have been grouped under 'others' in this Report. This includes:

- India
- Rest of Asia
- South Korea

China and Hong Kong are grouped as China in the IVS.

3.5.3 Differences in base sizes

All charts and tables include base sizes that vary throughout the Report. In some cases, this is due to the question, for example, those travelling for 'holiday/vacation' answer the question about the type of 'holiday/vacation'. In other cases, this is due to questions that have been missed on the paper surveys at data collection. This has been addressed in the 2016 survey with electronic recording of data.

3.5.4 Rounding Error

Some percentages do not add up to one hundred percent (100%) due to rounding error. To make comprehension easier, percentages are shown without decimal places, thus shown to the nearest whole number. For example, 99.4% will be shown as 99% while 99.6% shown as 100%.



4 VISITING FIJI

This section includes questions on:

- Tourism Areas and Provinces visited
- Visitors and transit passengers
- Reasons for visiting Fiji
- Main reason for visiting Fiji as a holiday/vacation destination
- Backpackers
- Whether Fiji is the main destination
- Previous and first time visits to Fiji
- Expectations of the visit to Fiji
- Average length of stay (nights) in Fiji
- Recommendation of Fiji as a place to visit
- Impressions of Fiji
- Room Density

In 2015, seventy-nine percent (79%) of visitors travelled to Fiji for a 'holiday/vacation'. While most give 'rest and relaxation' (84%) as their main reason for choosing a Fijian holiday, there are also strong niche markets including 'honeymoon' (6%) and 'weddings' (6%).

Backpackers have seen a steady growth over the last two years and continue to be an important market contributing eight percent (8%) of visitors to Fiji in 2015. Those backpacking predominantly come from the United Kingdom (47%) and Continental Europe (38%).

Forty-one percent (41%) of visitors have previously been to Fiji with the largest proportion of repeat visitors coming from Pacific Islands (74%), New Zealand (53%) and Australia (43%). Repeat visits from Pacific Island countries can be expected due to family relationships, transit, work, education and other reasons in relation to the close proximity of Fiji. Majority of the repeat visits are recreational indicating that the Fiji experience is powerful in attracting repeat visitors. This is supported by the seventy-nine percent (79%) of first-time visitors who found their experience in Fiji to be 'more enjoyable' and 'much more enjoyable than expected'.

The average length of stay was 10.1 nights and the average room density was 2.0 people in 2015.

4.1 Areas visited

This report analyse visitors by Tourism Areas and Provinces visited. Visitors make an average of 1.29 visits to Provinces and 1.41 visits to Tourism Areas.

Table 8: Provinces visited

Base: 3,923

| | % |
|-------------------------------|----|
| Ba | 60 |
| Nadroga/Navosa | 47 |
| Rewa | 8 |
| Serua | 3 |
| Cakaudrove | 3 |
| Ra | 1 |
| Lomaiviti | 0 |
| Tailevu | 0 |
| Kadavu | 0 |
| Macuata | 0 |
| Rented house | 1 |
| Stayed with friends/relatives | 4 |
| Unspecified | 2 |

The Province of Ba accounts for sixty percent (60%) of visitors and Nadroga/Navosa a further forty-seven percent (47%) of visitors.

Table 9: Tourism Areas visited

Base: 3,923

| | % |
|-------------------------------|----|
| Denarau | 32 |
| Nadi | 28 |
| Coral Coast | 26 |
| Mamanuca Islands | 20 |
| Yasawa Islands | 9 |
| Suva | 7 |
| Lautoka/Islands off Lautoka | 4 |
| Deuba/Pacific Harbour | 3 |
| Taveuni/Islands off Taveuni | 2 |
| Savusavu/Islands off Savusavu | 2 |
| Rakiraki/Islands off Rakiraki | 1 |
| Beqa | 1 |
| Lomaiviti | 0 |
| Nausori/Tailevu | 0 |
| Kadavu | 0 |
| Labasa/Islands off Labasa | 0 |
| Levuka | 0 |
| Ba/Tavua | 0 |
| Lau | 0 |
| Unspecified | 6 |

There are five Tourism Areas that had visitors above the average including:

- Denarau (32%)
- Nadi (28%)
- Coral Coast (26%)
- Mamanuca Islands (20%)
- Yasawa (9%)

Other Tourism Areas had seven percent (7%) or fewer visitors. Six percent (6%) of visitors could not be identified as staying in a Tourism Area as most of these visitors had stayed in non-paid accommodation or rented a house/apartment and did not specify the area in which they stayed in.

4.2 Visitors and transit passengers

Both departing visitors and transit passengers are interviewed in the IVS. Transit passengers also contribute to the economy by purchases made at the Nadi International Airport.

There are two types of transit passengers:

- Those who change flights in Fiji and do not leave the airport terminal building; and
 - Those who visit Fiji to transit to another location and leave the airport terminal building.
- Both of these categories are included in the data as 'transit'.

In the 2015 IVS, ninety-five percent (95%) of interviewees were visitors and five (5%) were transit passengers.



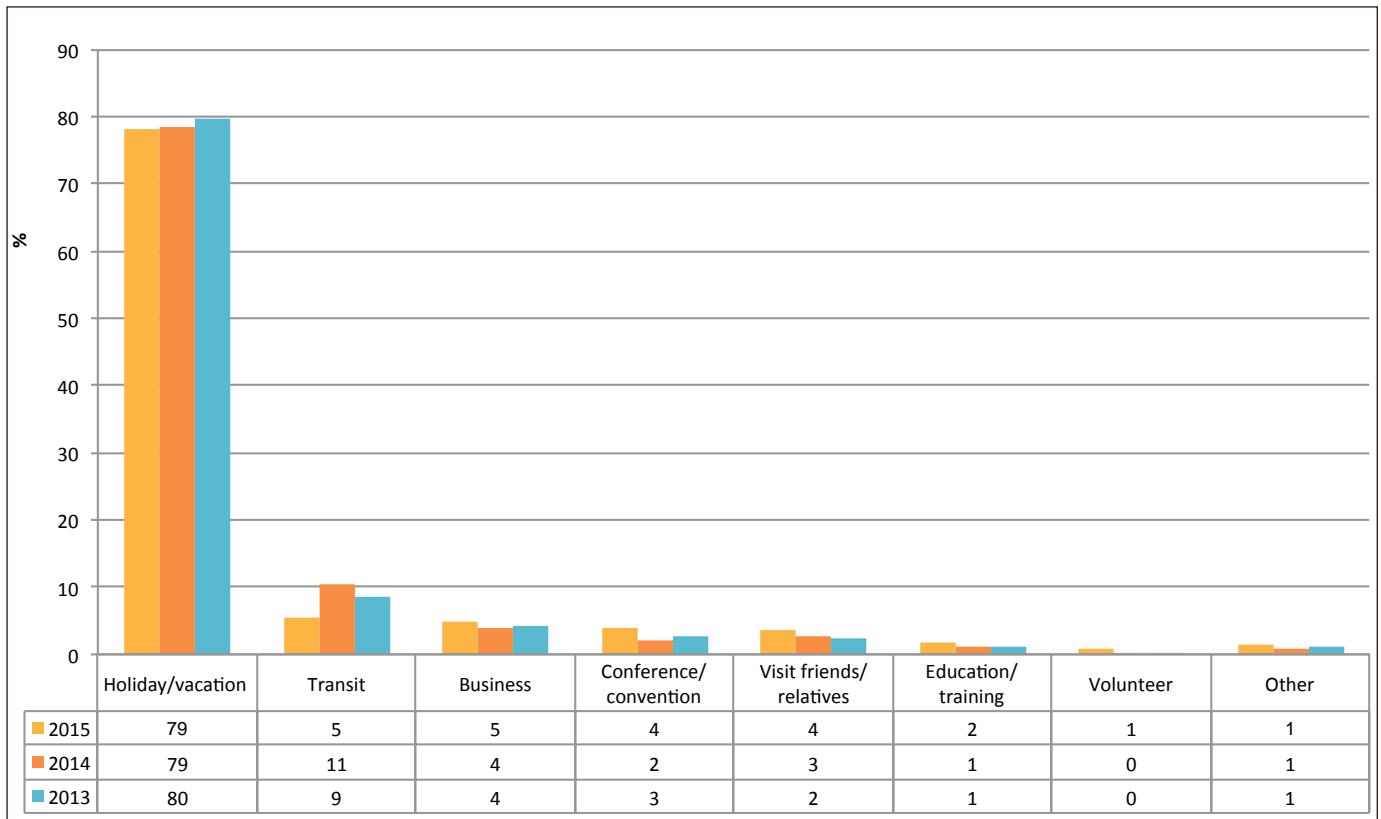


4.3 Reasons for visiting Fiji

Reasons for visiting Fiji are in two parts; an overall category that includes 'holiday/vacation' as a group and a subset of types of 'holiday/vacation'.

Chart 1: Q13 Main reason for visiting Fiji

Base: 4,103 (2015)



Base: All visitors

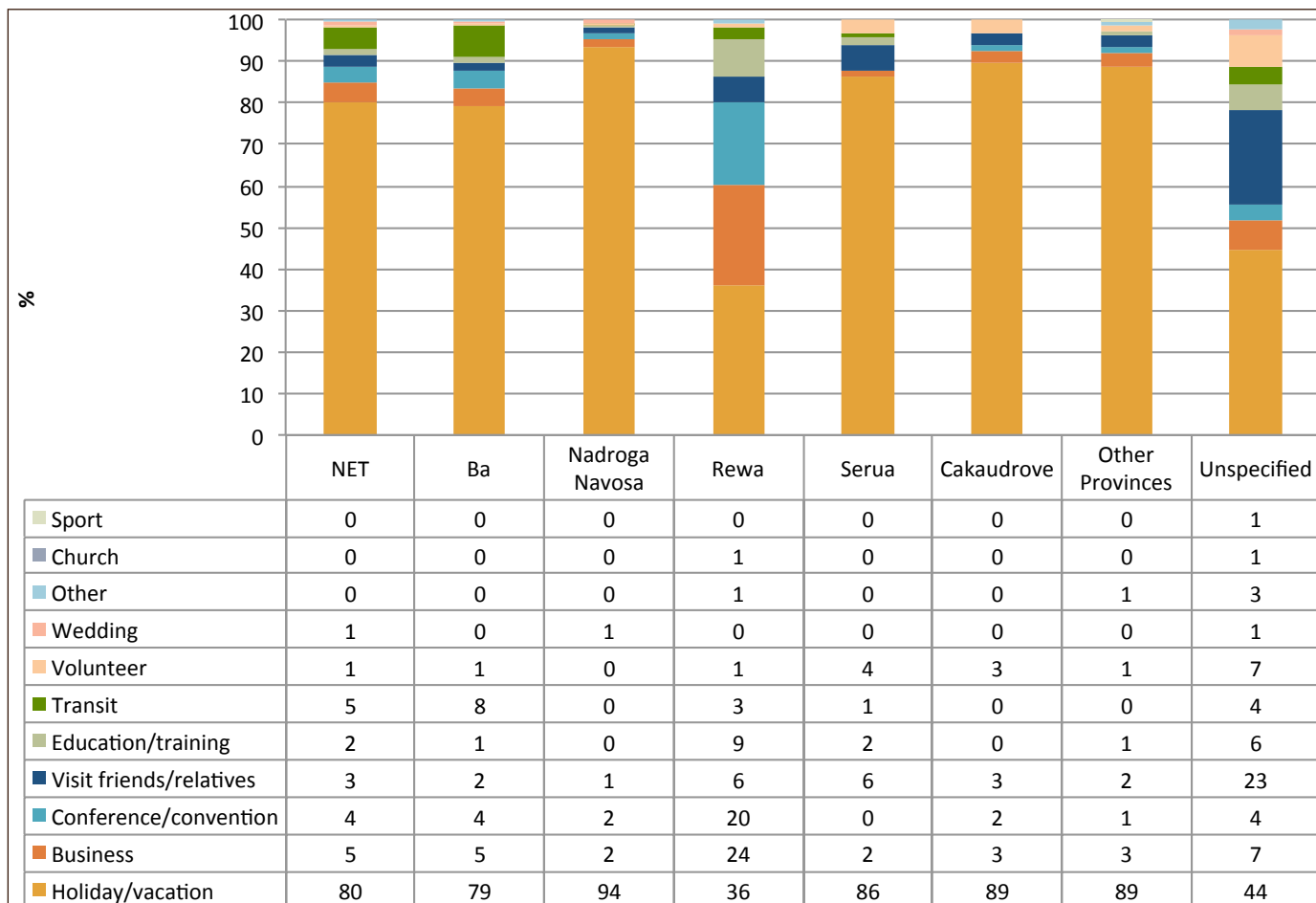
In 2015, the primary reason for visiting Fiji was 'holiday/vacation' with seventy-nine percent (79%) of visitors. The remaining visitors came for a number of other reasons including:

- Transit (5%)
- Business (5%)
- Conference/convention (4%)
- Visiting friends/relatives (4%)
- Education/training (2%)
- Volunteer (1%)



Chart 2: Q13 Main reason for visiting Fiji by Province

Base: 3,911



Base: All visitors

'Holiday/vacation' is the primary reason for visits to all Provinces and is highest for:

- Nadroga/Navosa (94%)
- Cakaudrove (89%)

The Province of Rewa in particular has a range of other reasons for visiting including:

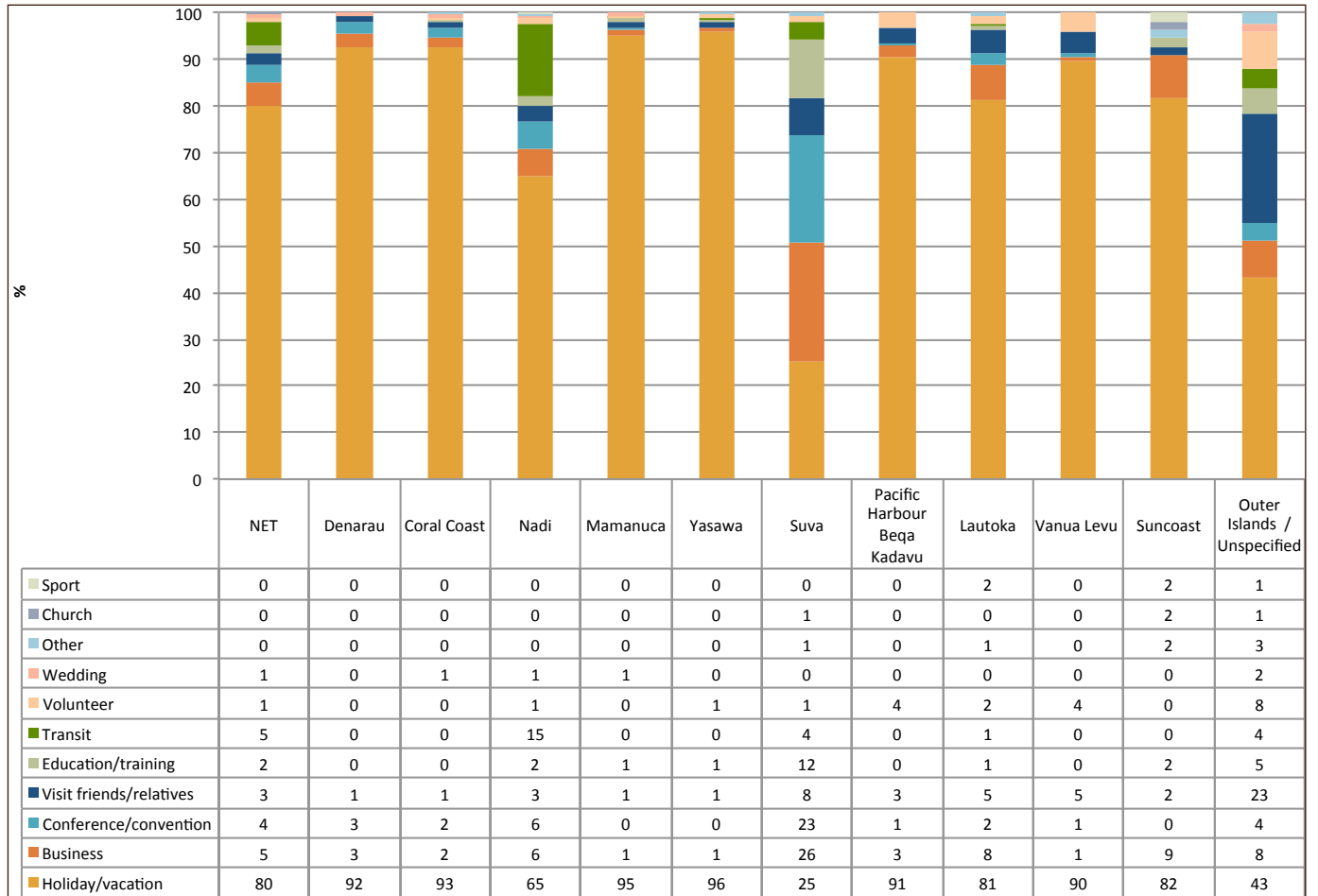
- Business (24%)
- Conference/convention (20%)
- Education/training (9%)
- Visiting friends/relatives (6%)





Chart 3: Q13 Main reason for visiting Fiji by Tourism Area

Base: 3,911



Base: All visitors

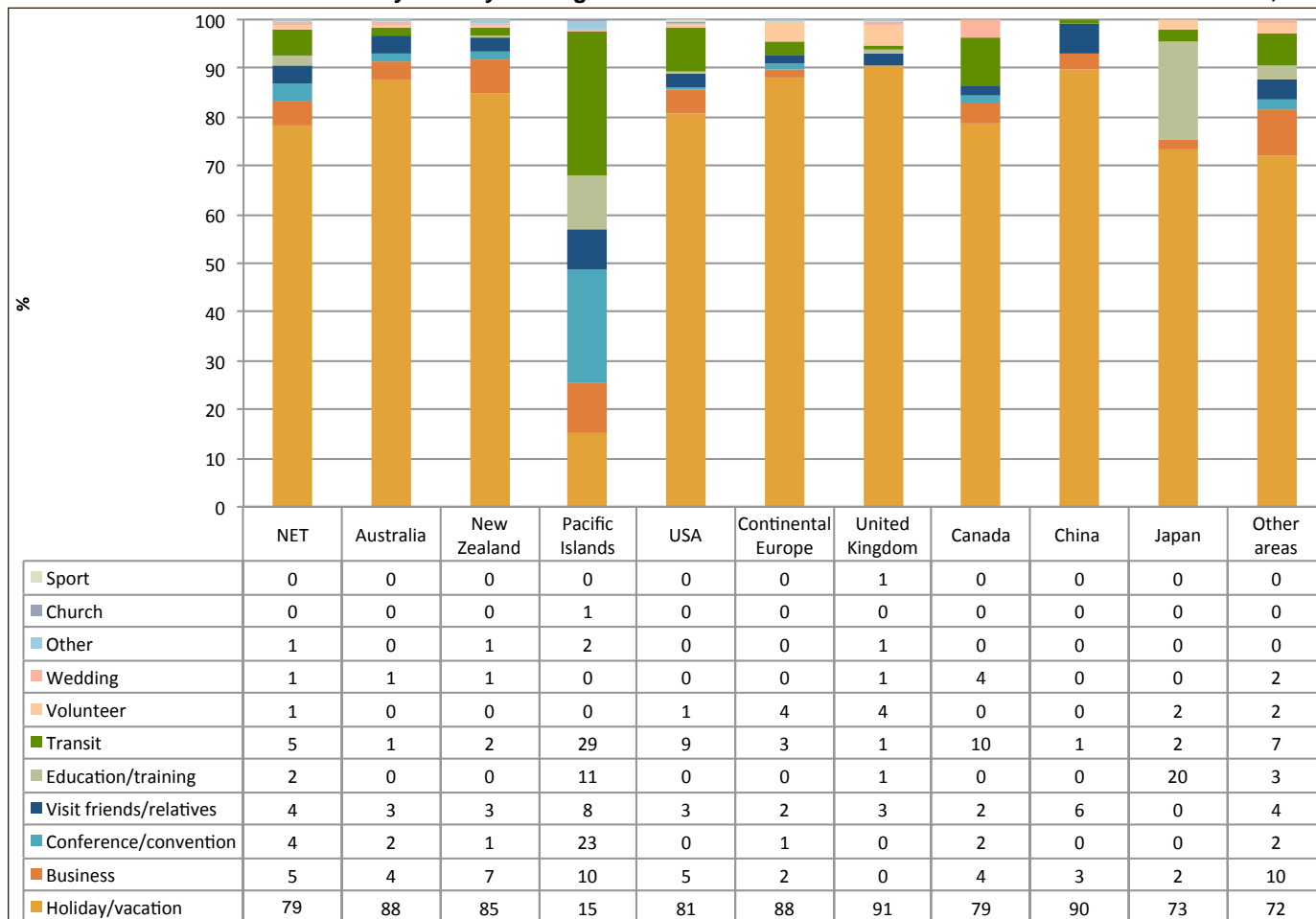
The main reason for visiting majority of the Tourism areas is 'holiday/vacation' with the exception of Suva. Visitors travel to Suva for a wider range of reasons including:

- Business (26%)
- Holiday/vacation (25%)
- Conference/convention (23%)
- Education/training (12%)
- Visiting friends/relatives (8%)



Chart 4: Q13 Main reason for visit by country and region of residence

Base: 4,089



Base: All visitors

Visitors from the following countries are most likely to come to Fiji for a 'holiday/vacation':

- United Kingdom (91%)
- China (90%)
- Australia (88%)
- Continental Europe (88%)
- New Zealand (85%)

Visitors from the Pacific Islands come for a range of reason, including:

- Transit (29%)
- Conference/convention (23%)
- Holiday/vacation (15%)
- Education/training (11%)
- Business (10%)
- Visiting friends/relatives (8%)

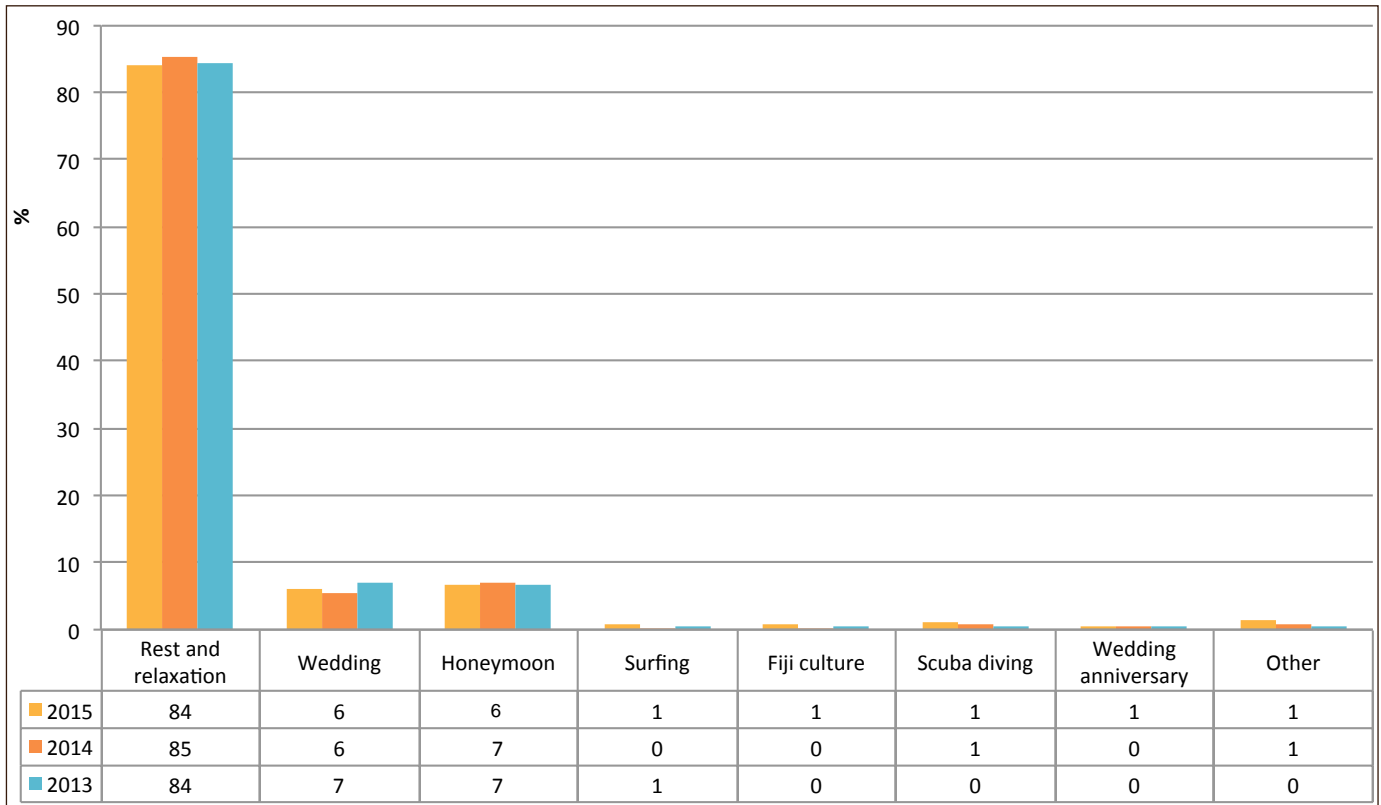


4.4 Main reason for visiting Fiji as a holiday/vacation destination

In understanding these findings, it is important to note that this question focuses on visitors who choose 'holiday/vacation' as their 'main reason' for visit. This does not restrict other activities as part of a 'holiday/vacation'.

Chart 5: Q14 Main reason for holiday/vacation

Base: 3,179 (2015)



Base: Holiday/vacation visitors

For the seventy-nine percent (79%) of visitors who visited Fiji for a 'holiday/vacation' in 2015, the main reason was 'rest and relaxation' (84%).

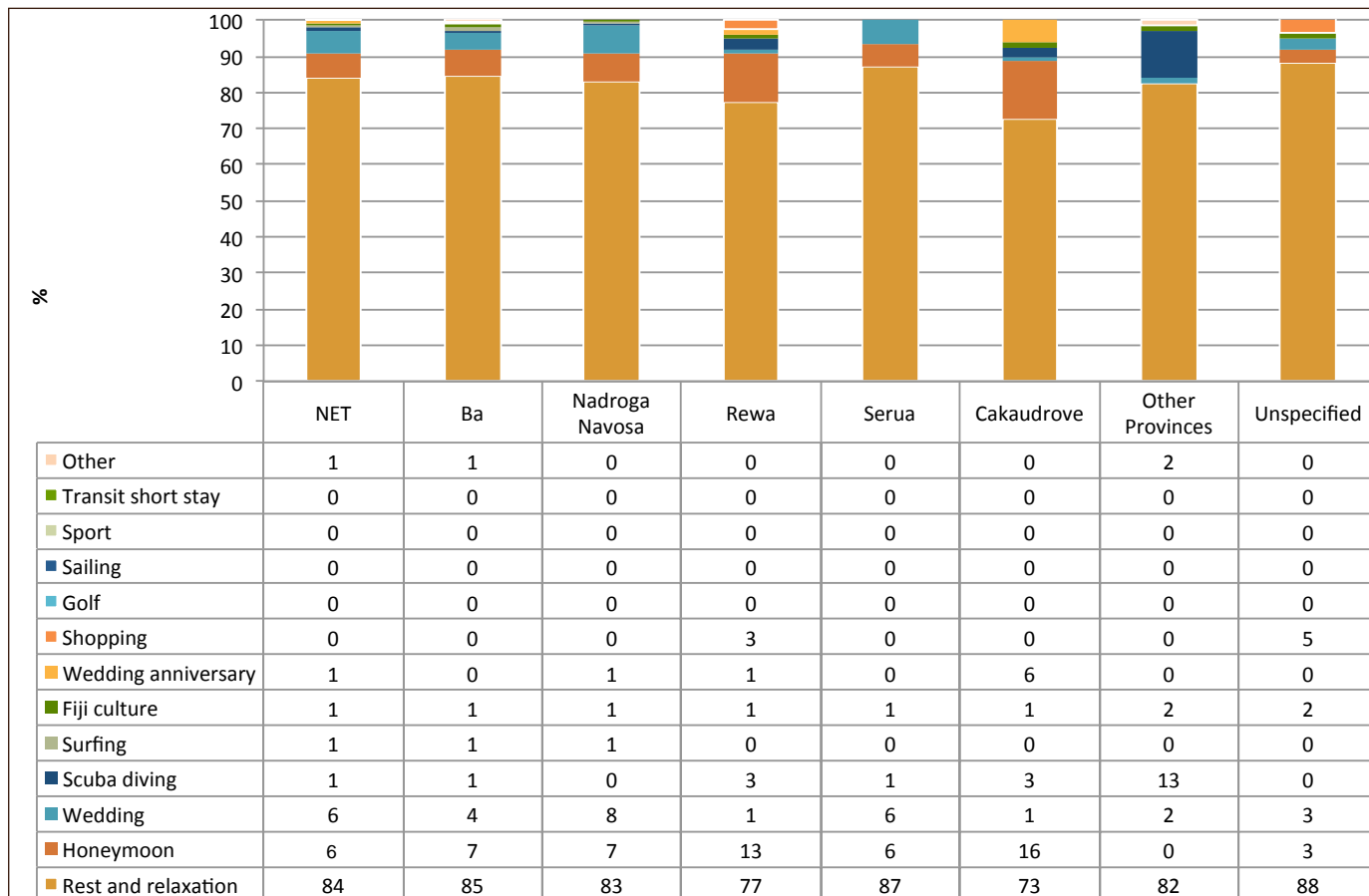
Key niche markets in 2015 are:

- Honeymoon (6%)
- Wedding (6%)



Chart 6: Q14 Main reason for a holiday/vacation by Province

Base: 2,738



Base: Holiday/vacation visitors

'Rest and relaxation' is the main reason for a 'holiday/vacation' for all Provinces.

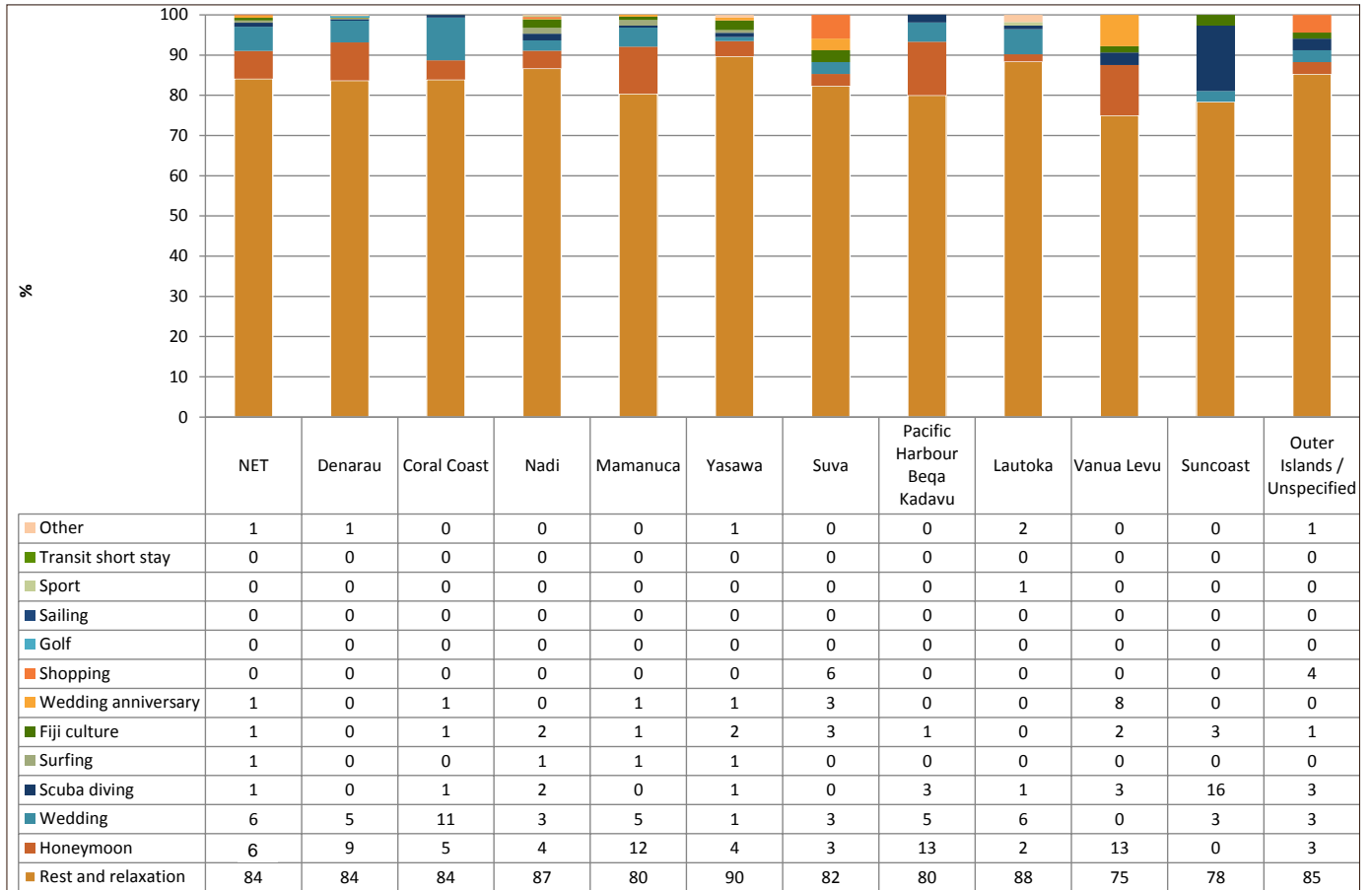
Key differences by Province are:

- Nadroga/Navosa
 - Wedding (8%)
 - Honeymoon (7%)
- Cakaudrove
 - Honeymoon (16%)
 - Wedding Anniversary (6%)
- Rewa
 - Honeymoon (13%)



Chart 7: Q14 Main reason for holiday/vacation by Tourism Area

Base: 2,738



Base: Holiday/vacation visitors

As with Provinces, 'rest and relaxation' is the main reason for visiting all Tourism Areas as a 'holiday/vacation' destination.

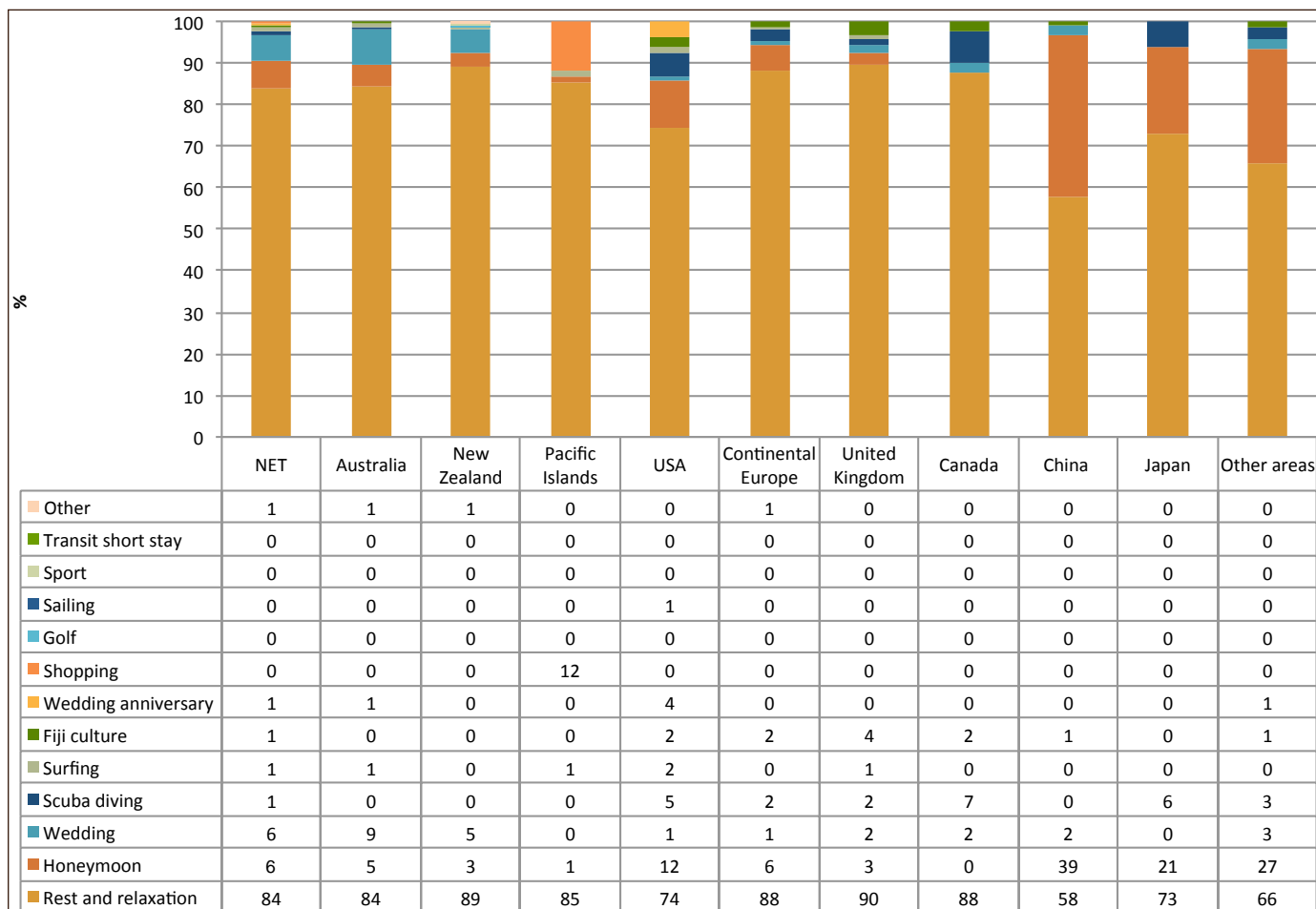
Key differences by Tourism Area are:

- Coral Coast
 - Wedding (11%)
- Mamanuca
 - Honeymoon (12%)
- Vanua Levu
 - Honeymoon (13%)
 - Wedding Anniversary (8%)
- Pacific Harbour/Beqa/Kadavu
 - Honeymoon (13%)
- Suncoast
 - Scuba diving (16%)
- Denarau
 - Honeymoon (9%)
- Suva
 - Shopping (6%)



Chart 8: Q14 Main reason for holiday/vacation by country/region of residence

Base: 3,169



Base: Holiday/vacation visitors

In the growing Chinese market, a large proportion of visitors come to Fiji for a 'honeymoon' (39%). Other key differences by country and region of residence are:

- Australia
 - Wedding (9%)
- Pacific Islands
 - Shopping (12%)
- USA
 - Honeymoon (12%)
 - Scuba diving (5%)
 - Wedding Anniversary (4%)
- United Kingdom
 - Fiji culture (4%)
- Canada
 - Scuba diving (7%)
- Japan
 - Honeymoon (21%)
 - Scuba diving (6%)



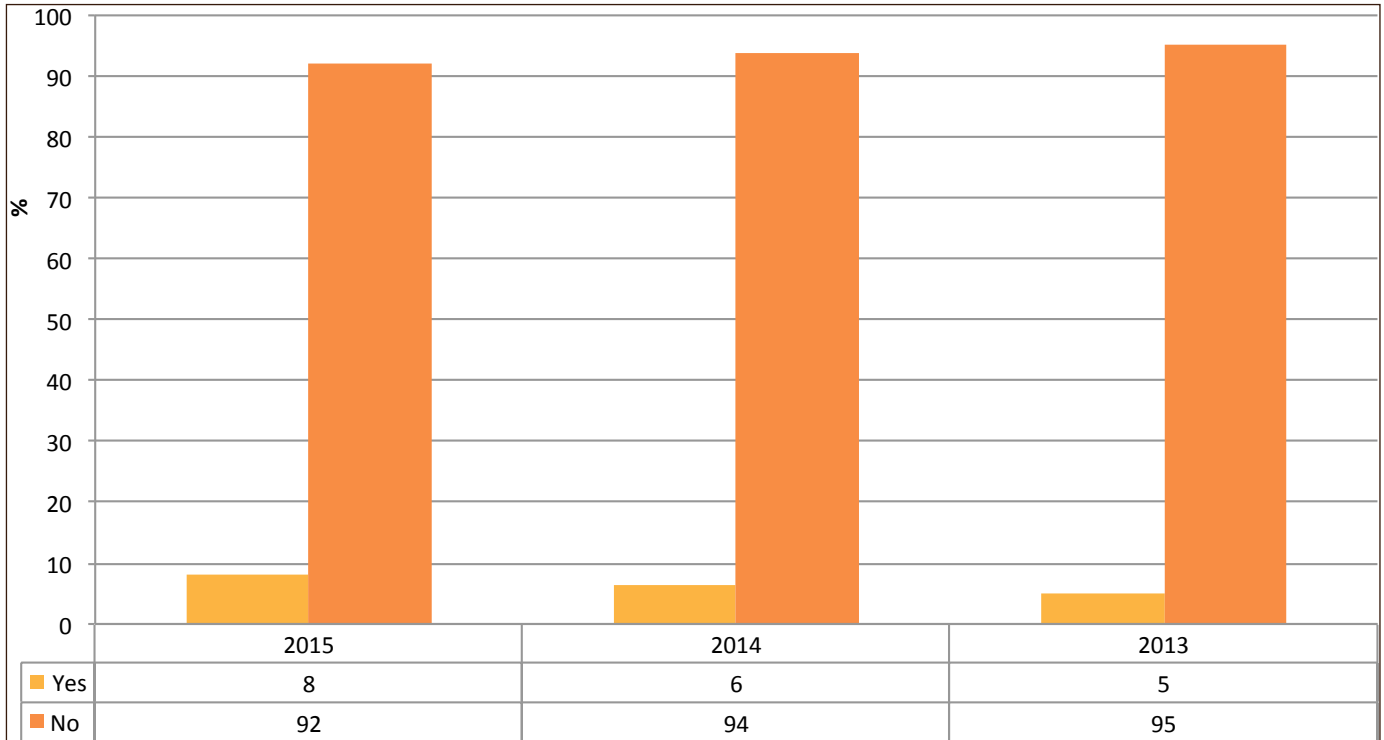
4.5 Backpackers

Defining backpackers is an issue for all countries IVS reporting. Some countries put a value on their average expenditure while others are classified by their accommodation type. Both these definitions have limitations; backpackers can spend a surprising amount on accommodation and are not necessarily 'low cost' accommodation users. They can also stay in a mix of accommodation types that include traditional backpacking properties, upscale 'glam-packing' and mainstream accommodation.

In the Fiji IVS, a pragmatic definition is used where research participants are asked "Are you backpacking". Backpackers in this context are self-described.

Chart 9: Q15 Backpackers

Base 3,324 (2015)



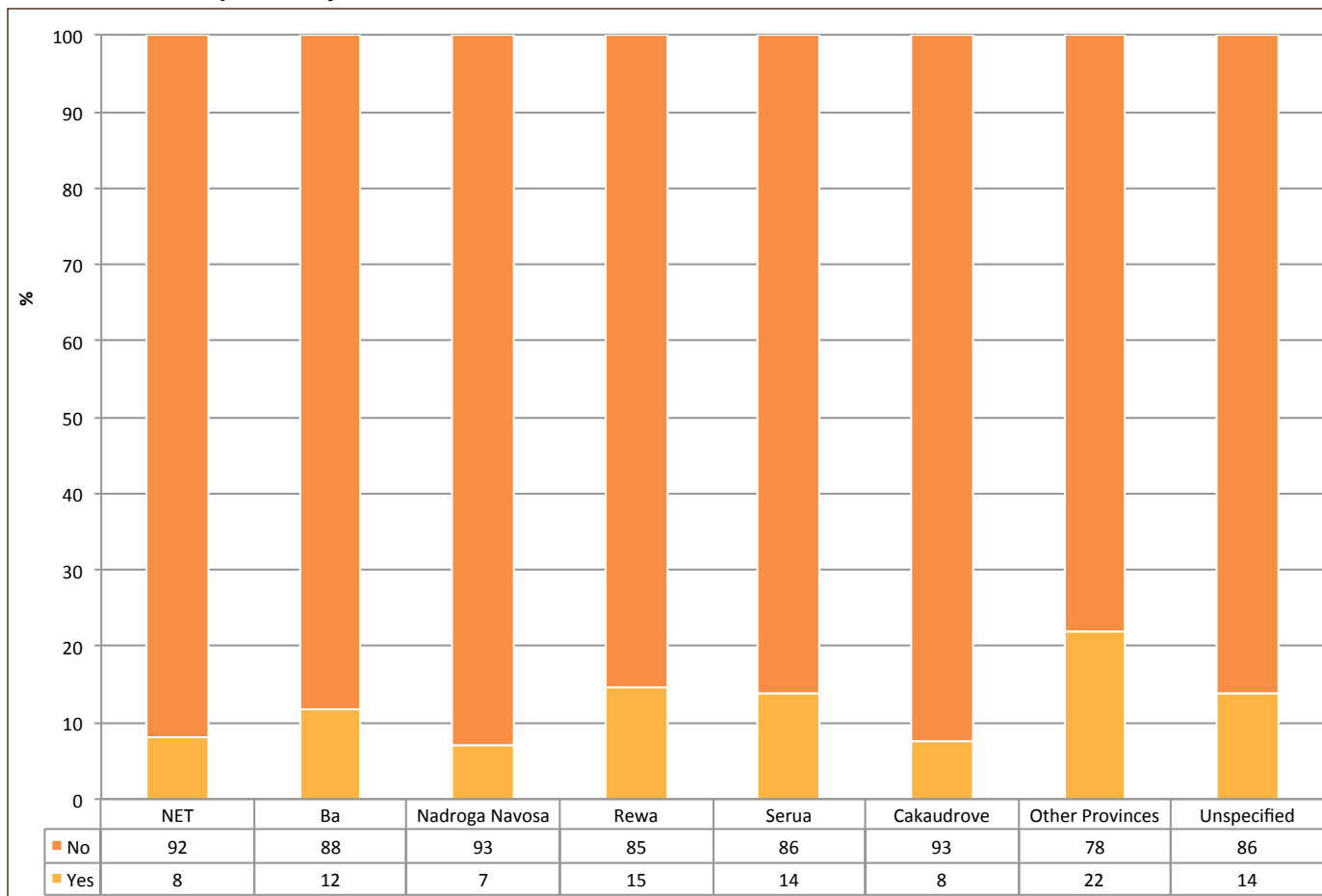
Base: All visitors

In 2015, eight percent (8%) of all visitors are backpackers. The percentage of backpackers had also increased from 2013 to 2015 as shown in chart 9 above.



Chart 10: Q15 Backpackers by Province

Base: 2,856



Base: All visitors

Backpackers are more likely to visit the Provinces of:

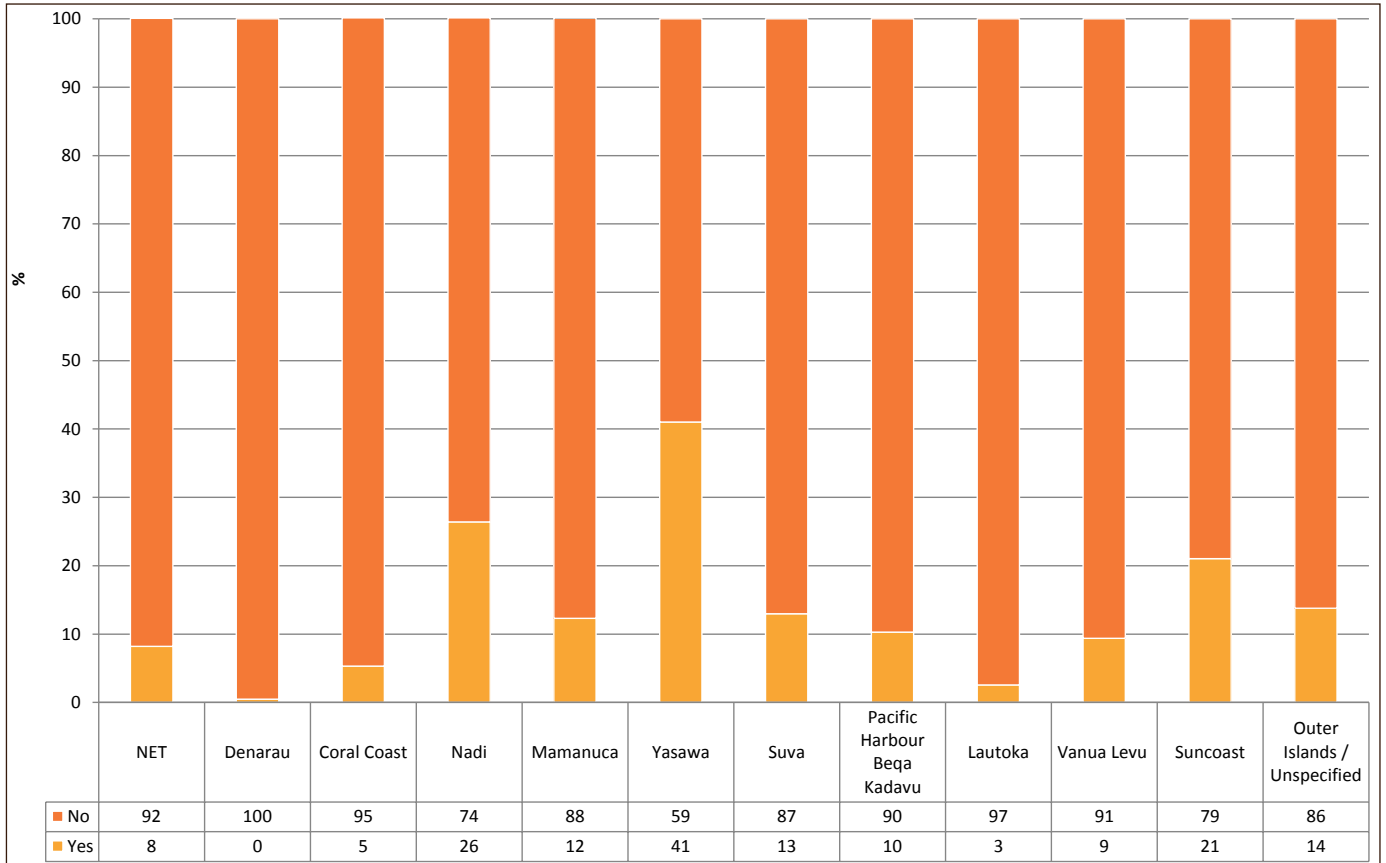
- Rewa (15%)
- Serua (14%)
- Ba (12%)





Chart 11: Q15 Backpackers by Tourism Area

Base: 2,856



Base: All visitors

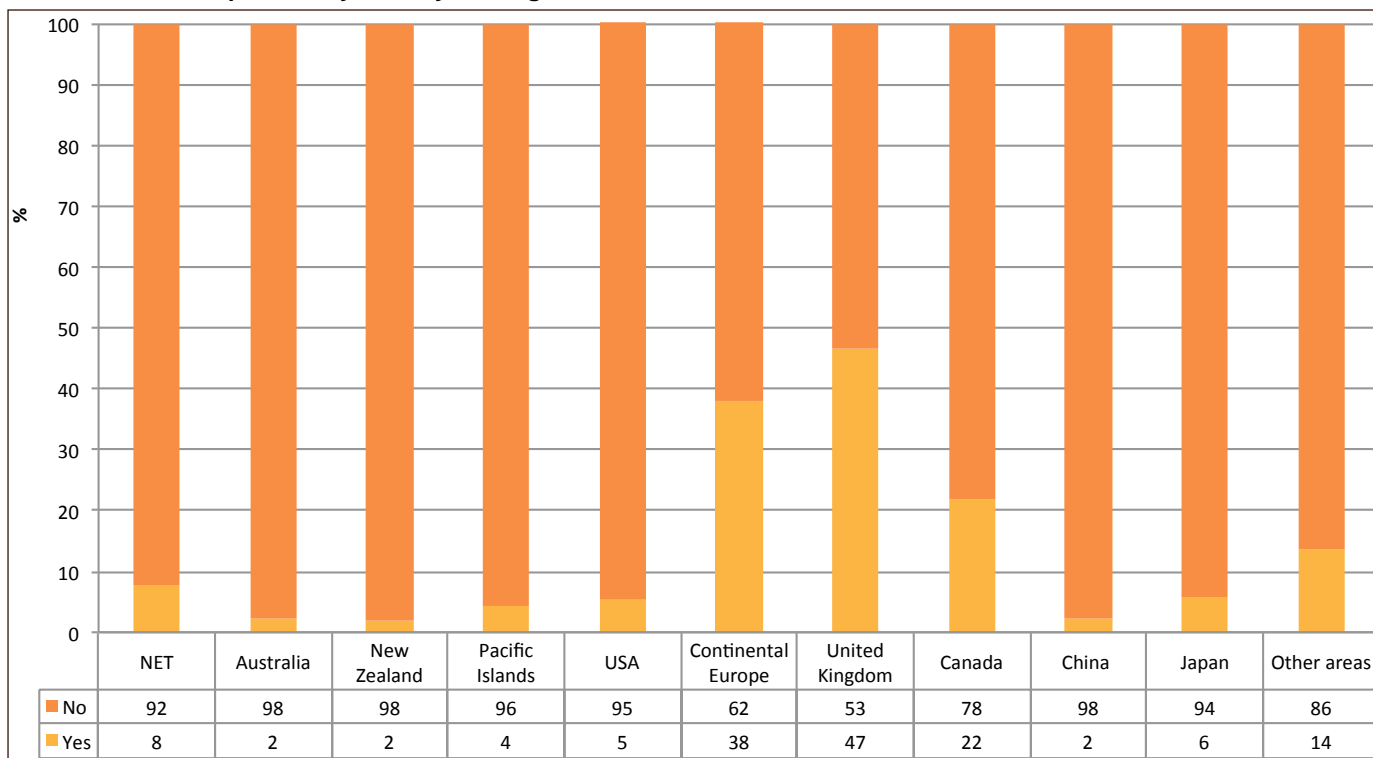
Backpackers are more likely to visit the Tourism Areas of:

- Yasawa (41%)
- Nadi (26%)
- Suncoast (21%)
- Suva (13%)
- Mamanuca (12%)



Chart 12: Q15 Backpackers by country and region of residence

Base: 3,313



Base: All visitors

The key source markets for backpackers are United Kingdom (47%), Continental Europe (38%) and Canada (22%).

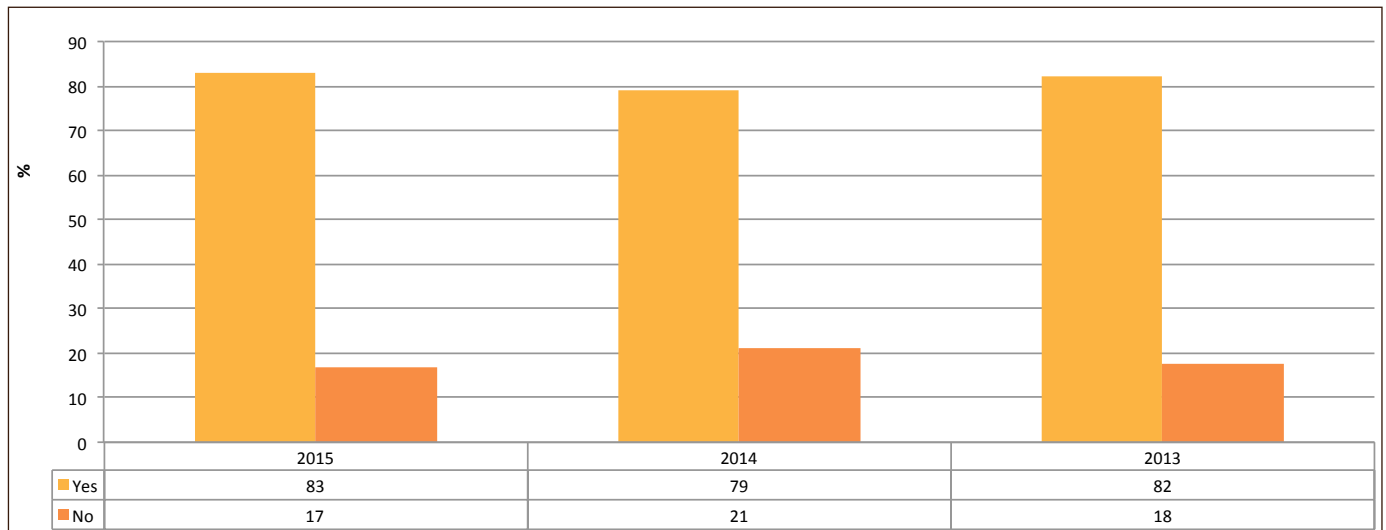




4.6 Whether Fiji is the main destination for visit

Chart 13: Q16 Is Fiji the main destination for this visit

Base 4,074 (2015)



Base: All visitors

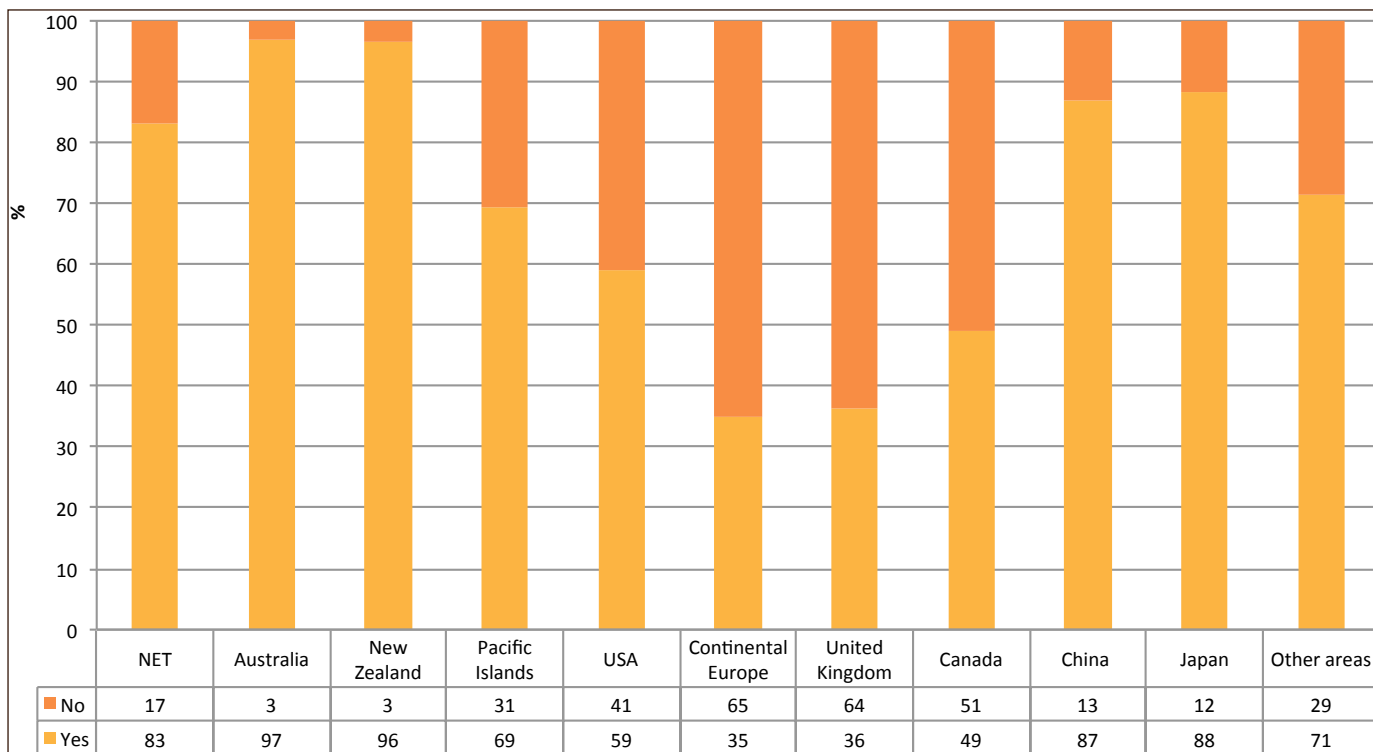
Fiji is the main destination for eighty-three percent (83%) of visitors in 2015. The percentage of visitors that chose Fiji as the main destination of visit decreased from 2013 to 2014 and increased from 2014 to 2015.





Chart 14: Q16 Is Fiji the main destination for visit by country/region of residence

Base: 4,060



Base: All visitors

Fiji is the main destination for visitors from:

- Australia (97%)
- New Zealand (96%)

Long haul visitors are more likely to have other destinations as part of their travel. Fiji was not the main destination for visitors from:

- Continental Europe (65%)
- United Kingdom (64%)
- Canada (51%)
- USA (41%)

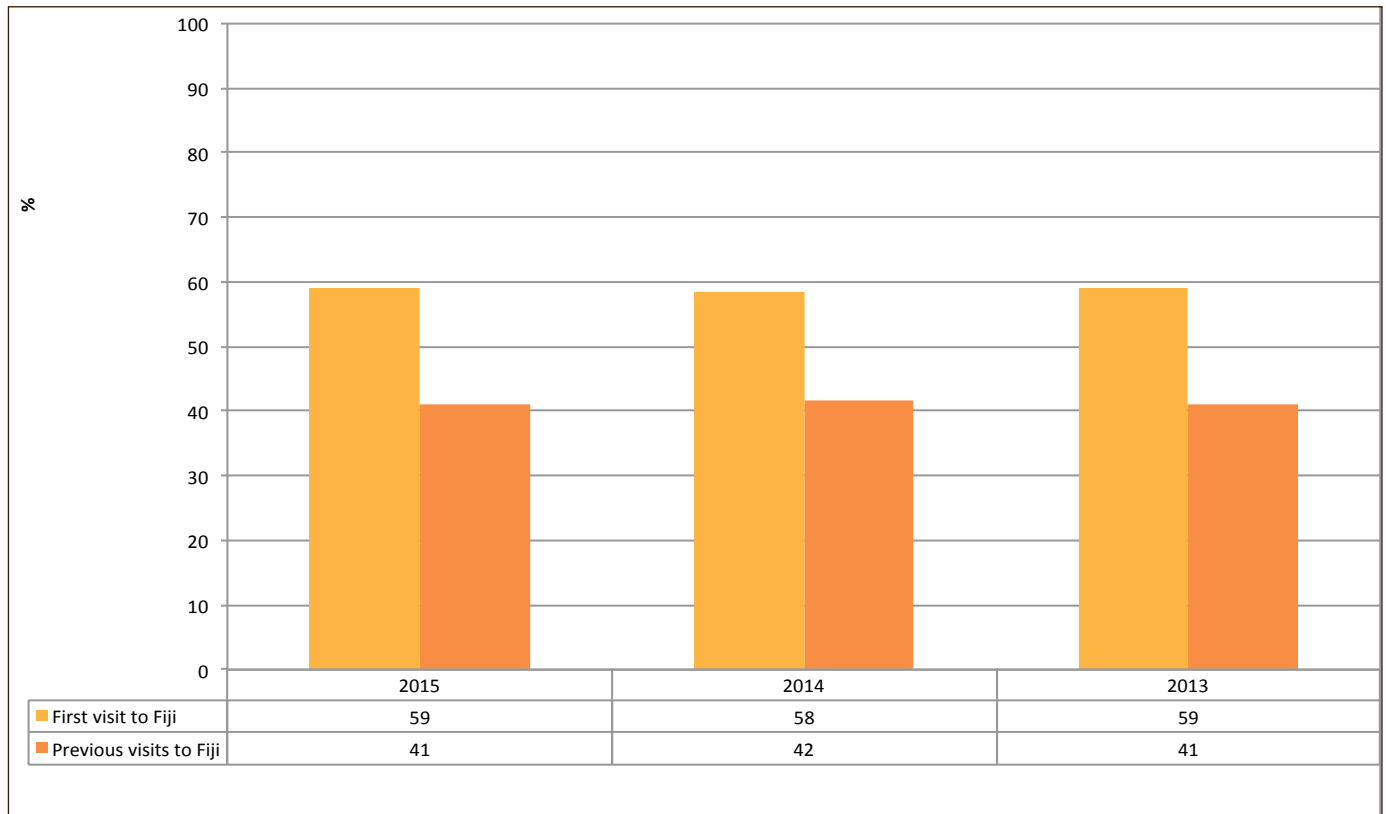
Thirty-one percent (31%) of Pacific Islanders indicated that Fiji was not their main destination as they are more likely to transit through Fiji.



4.7 Previous visits and first time visits to Fiji

Chart 15: Q80 First time and previous visits to Fiji

Base: 4,098 (2015)



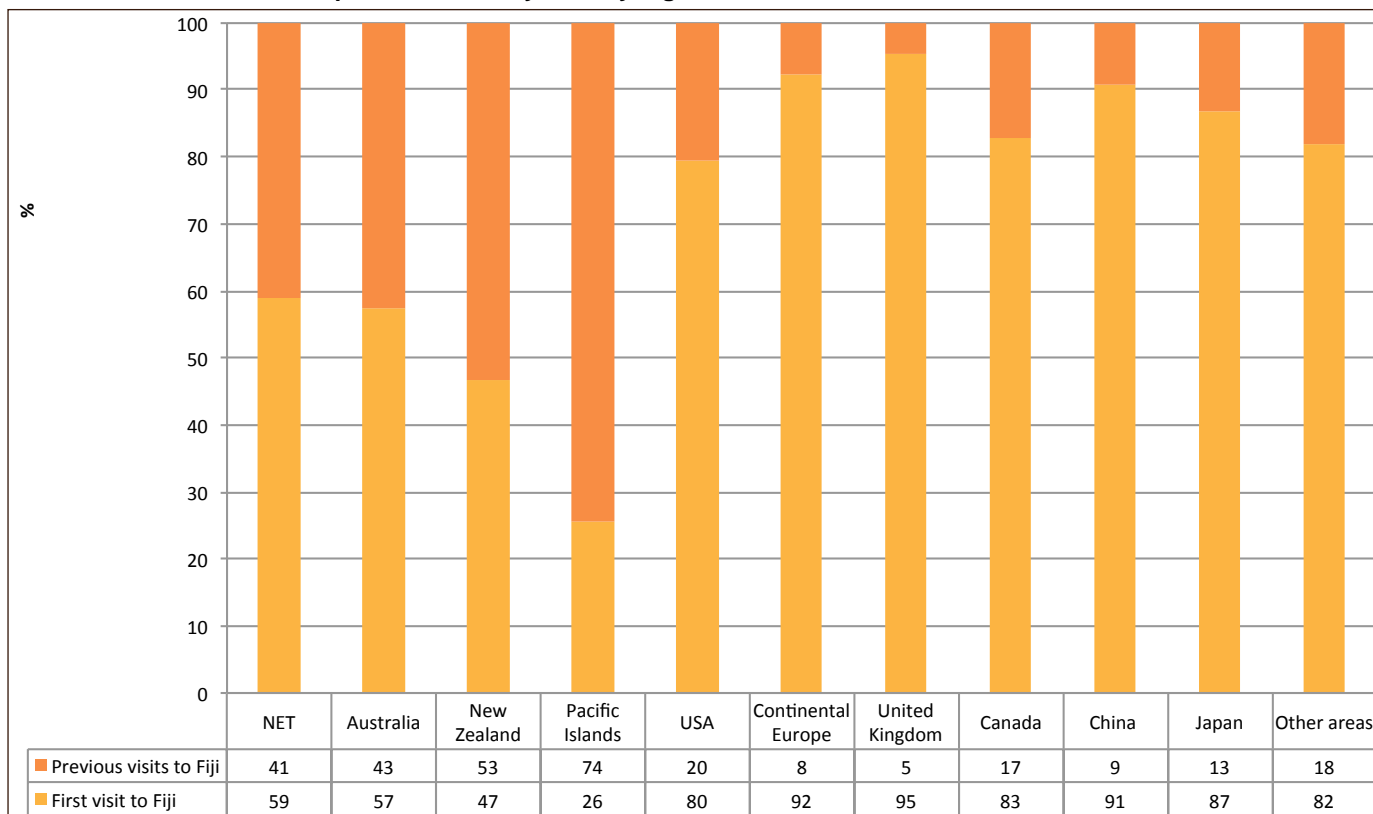
Base: All visitors

In 2015, fifty-nine percent (59%) of visitors came to Fiji for the first time while forty-one percent (41%) have visited previously. The ratio of first visit and previous visits to Fiji has been held relatively consistent over the three years.



Chart 16: Q80 First time and previous visits by country/region

Base: 4,084



Base: All visitors

Visitors from the following countries/region are most likely to have made previous visits including:

- Pacific Islands (74%)
- New Zealand (53%)
- Australia (43%)

First time visitors are most likely to come from long haul markets of:

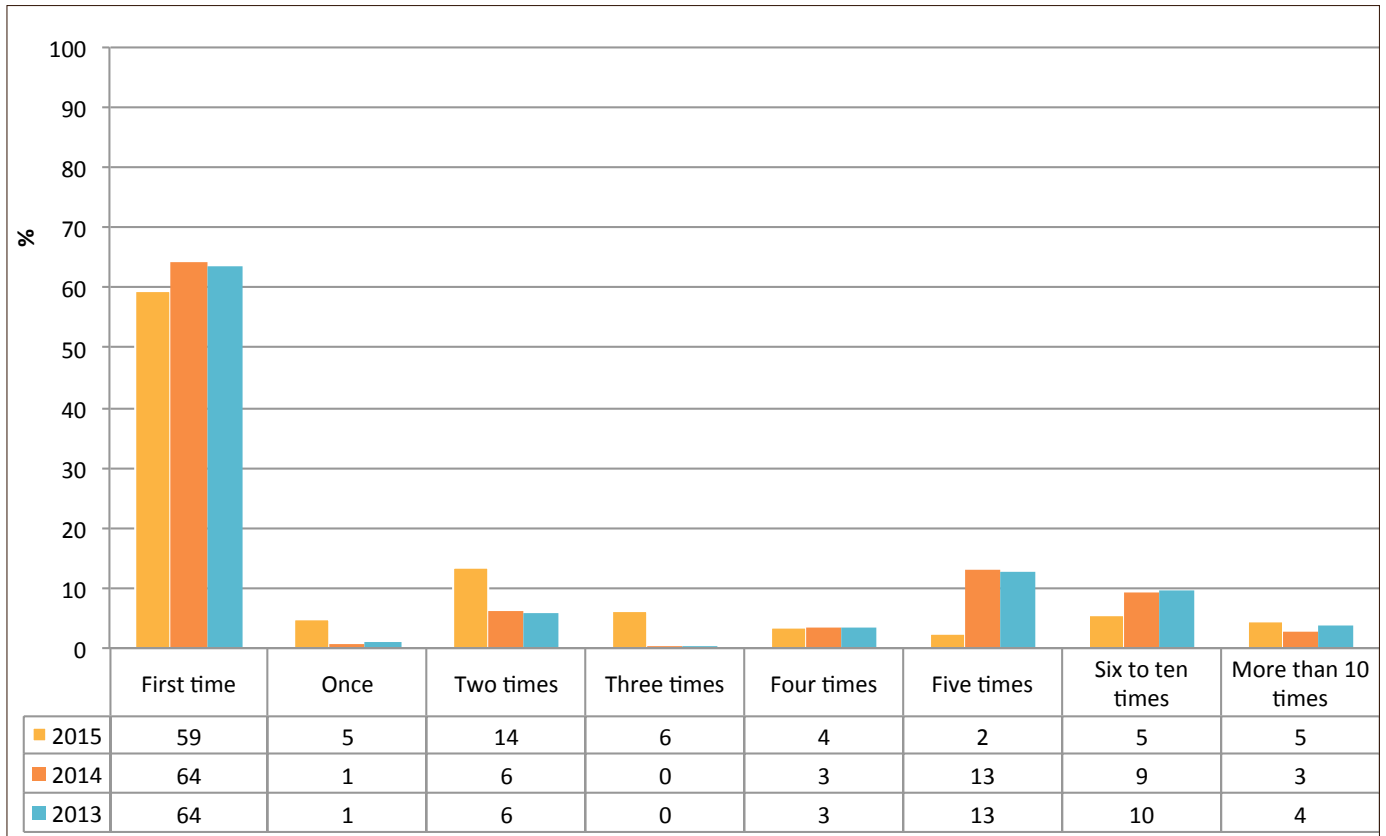
- United Kingdom (95%)
- Continental Europe (92%)
- China (91%)
- Japan (87%)
- Canada (83%)
- USA (80%)



4.7.1 Number of visits to Fiji

Chart 17: Q80 & Q82

Base: 4,118 (2015)



Base: All visitors

In 2015, over half (59%) of all visitors came as a 'first time' visitor while five percent (5%) had visited once and fourteen percent (14%) had visited twice before.

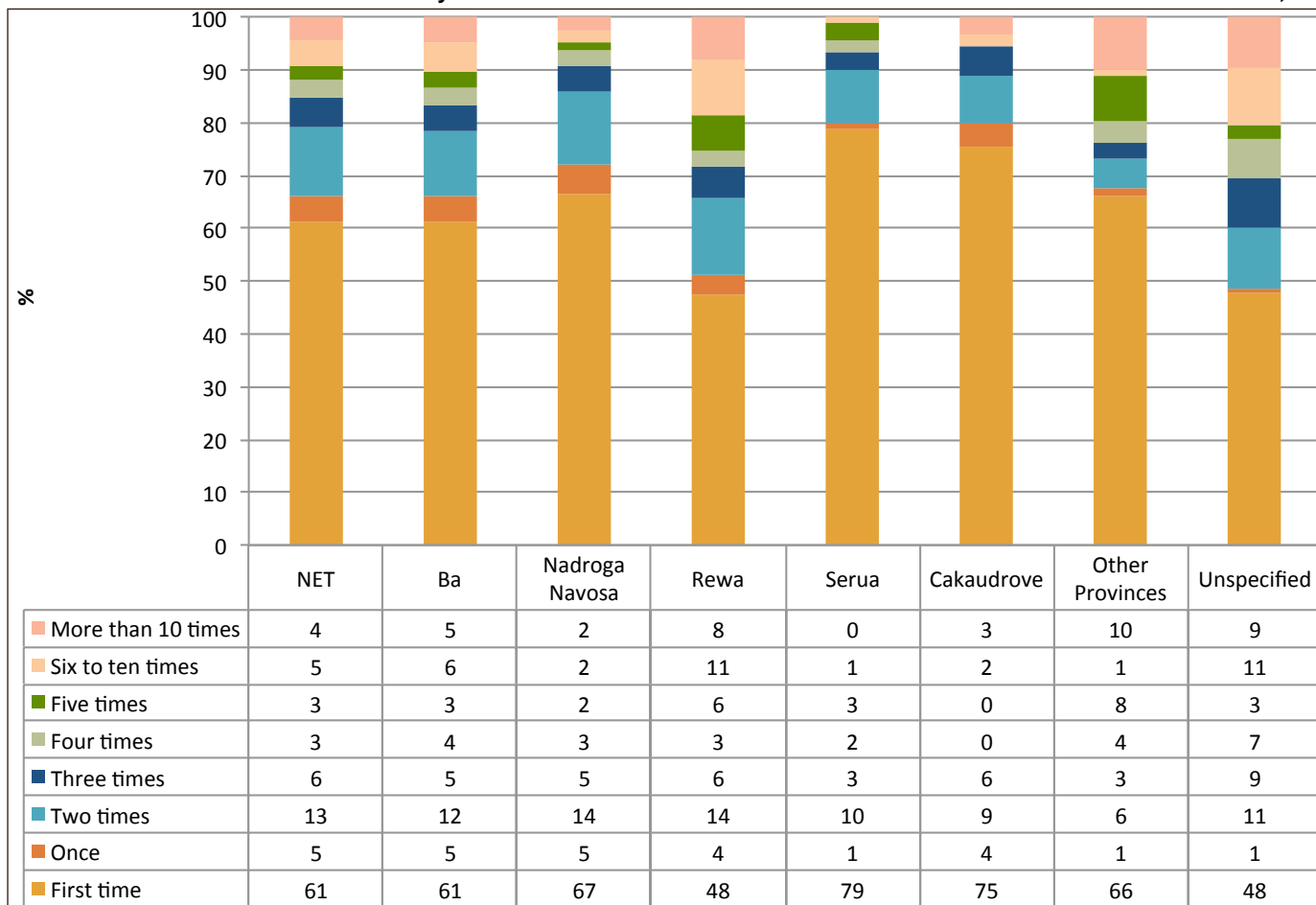
The percentage of first time visitors had decreased over the three years while the percentage of repeat visitors had increased.





Chart 18: Q80 & Q82 Number of visits by Province

Base: 3,363



Base: All visitors

First time visitors are more likely to visit the Provinces of:

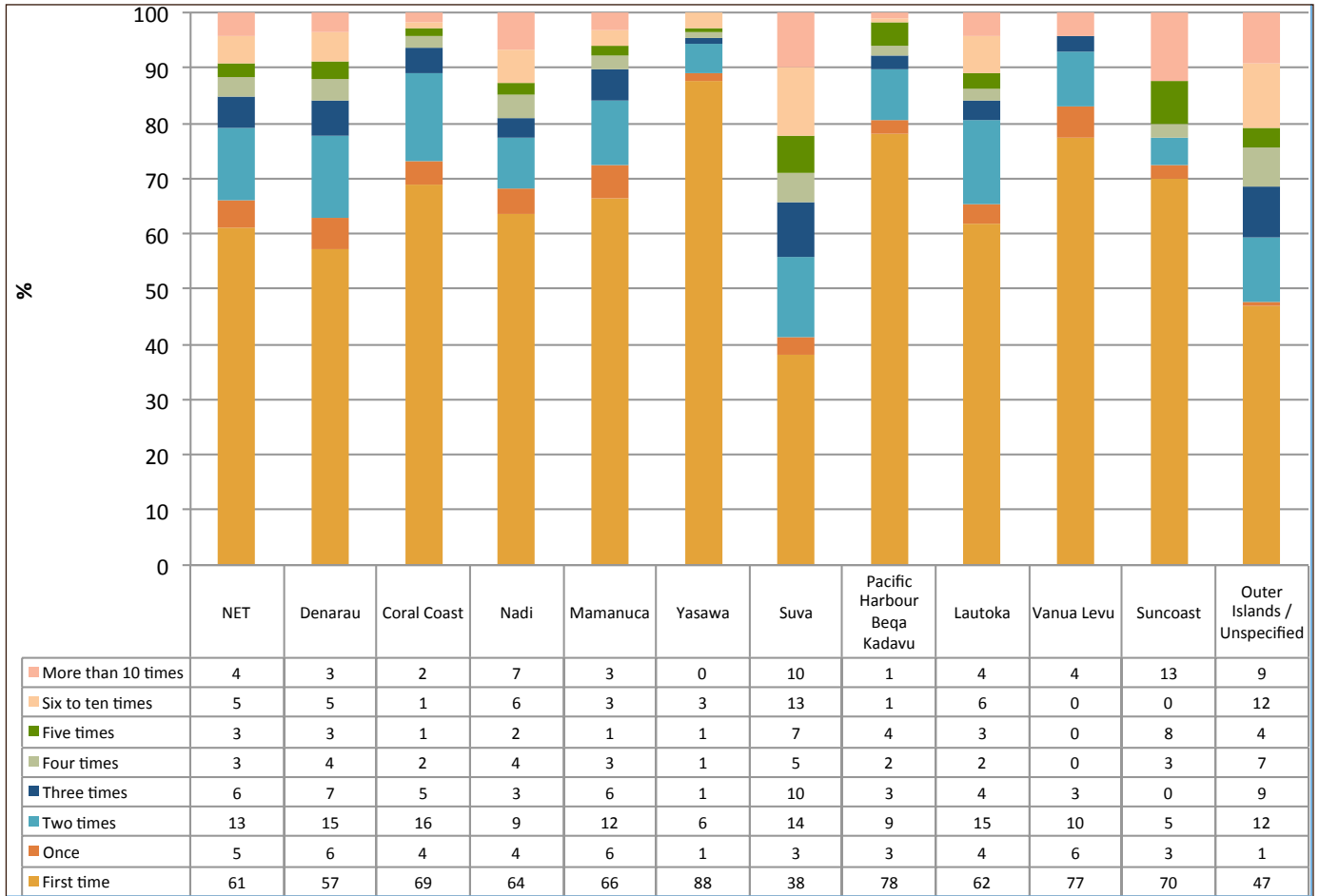
- Serua (79%)
- Cakaudrove (75%)
- Nadroga/Navosa (67%)

Previous visitors are more likely to make five or more visits to the Province of Rewa (25%).



Chart 19: Q80 & 82 Number of visits by Tourism Area

Base: 3,363



Base: All visitors

First time visitors are more likely to visit:

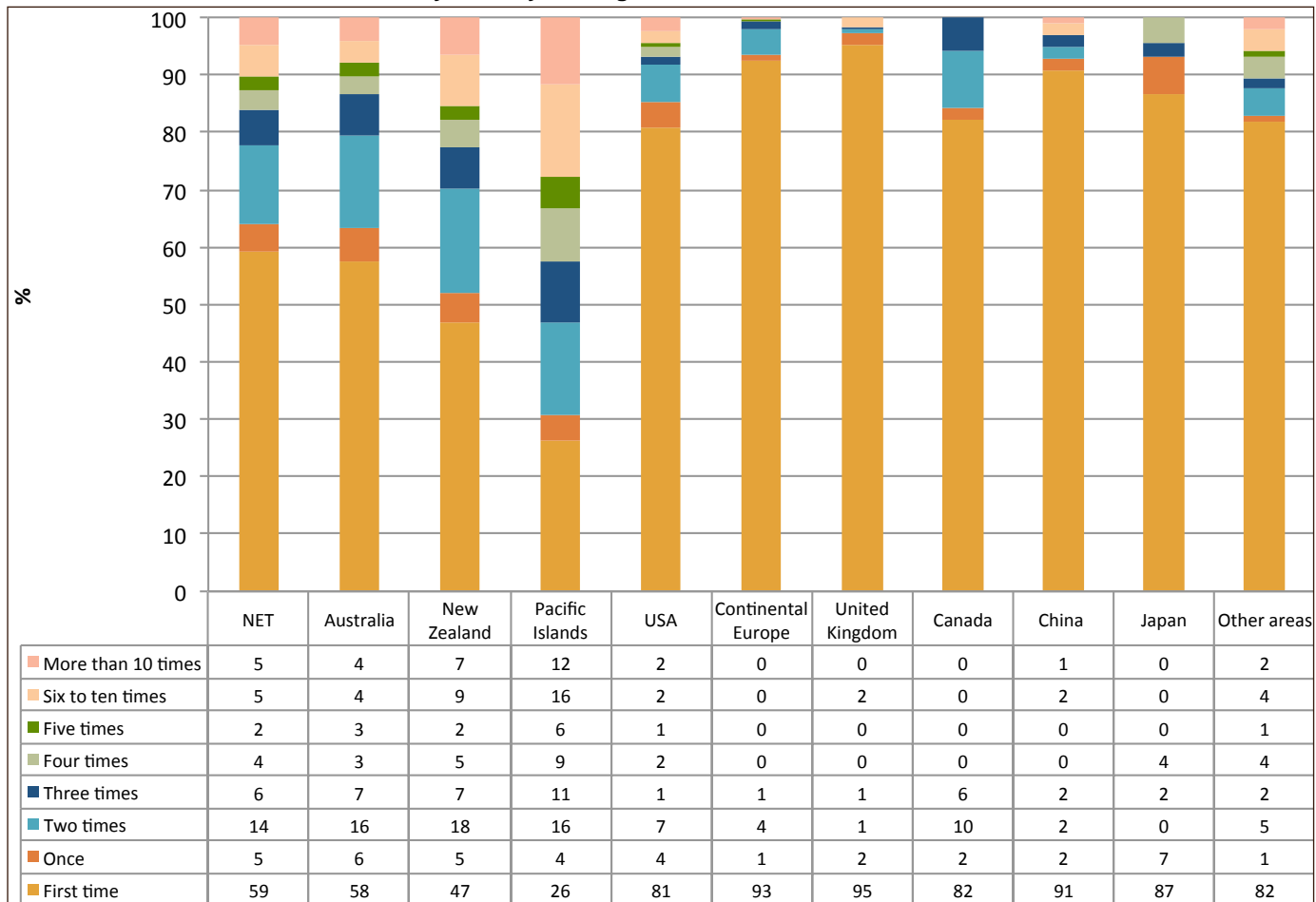
- Yasawa (88%)
- Pacific Harbour/Beqa/Kadavu (78%)
- Vanua Levu (77%)
- Suncoast (70%)
- Coral Coast (69%)
- Mamanuca (66%)

Previous visitors are more likely to make five or more visits to the Tourism Area of Suva (29%).



Chart 20: Q80 & Q82 Number of visits by Country and region of residence

Base 4,104



Base: All visitors

The most frequent visitors with five or more visits to Fiji are from:

- Pacific Islands (34%)
- New Zealand (18%)



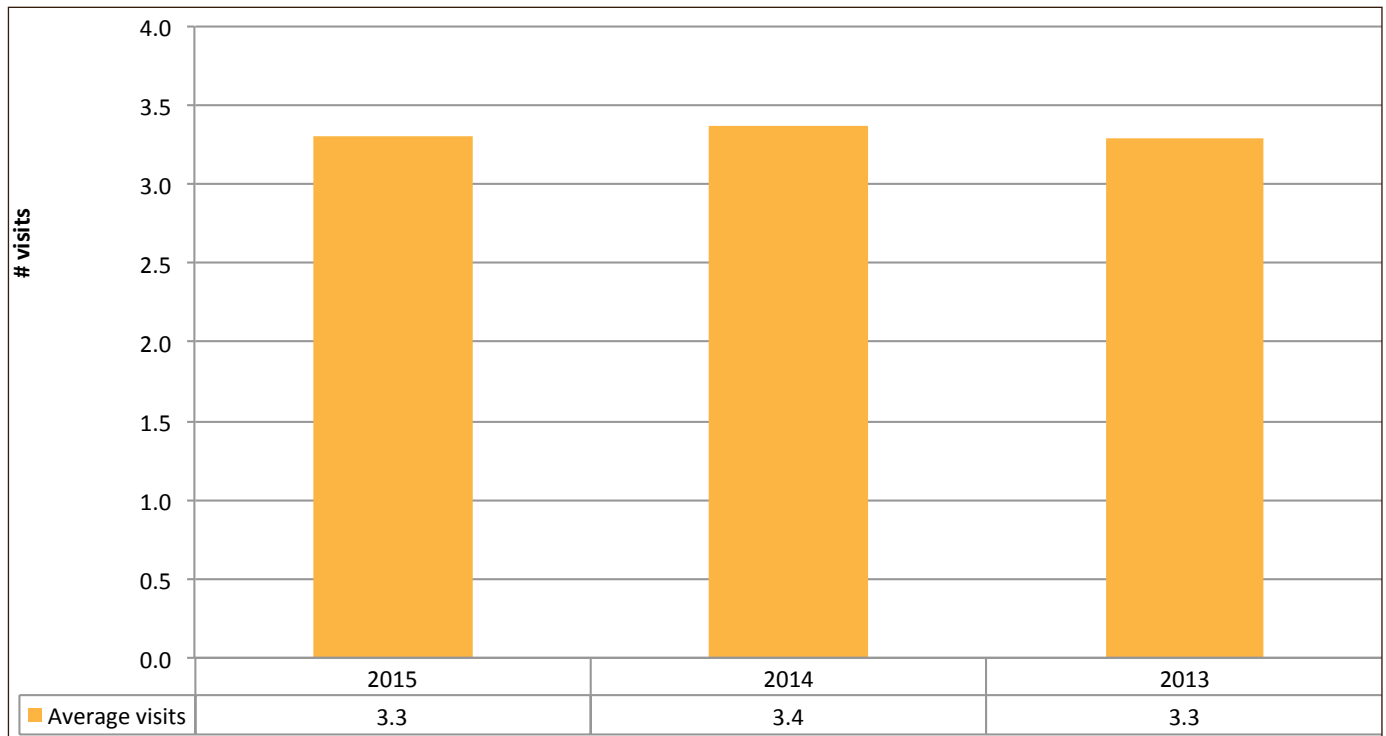


4.7.2 Average visits

The average number of visits is derived from question 80 (first time visit or previous visits) and question 82 (number of previous visits) whereby a first time visit is equivalent to 1.

Chart 21: Q80 & Q82 Average number of Visits

Base: 4,118 (2015)

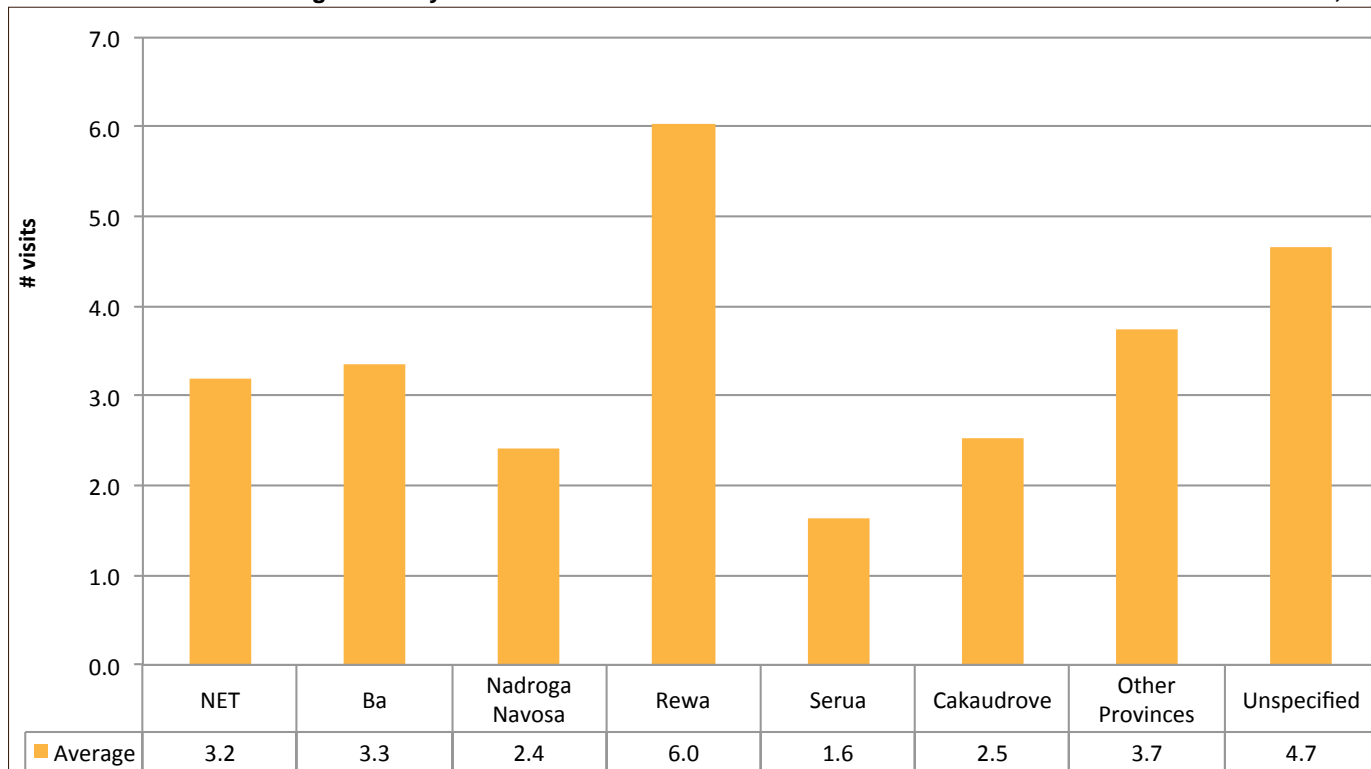


Base: All Visitors

In 2015, the average number of visits to Fiji was 3.3. The average number of visits to Fiji has not significantly changed over the three years.

Chart 22: Q80 & Q82 Average visits by Province

Base: 3,363



Base: All visitor

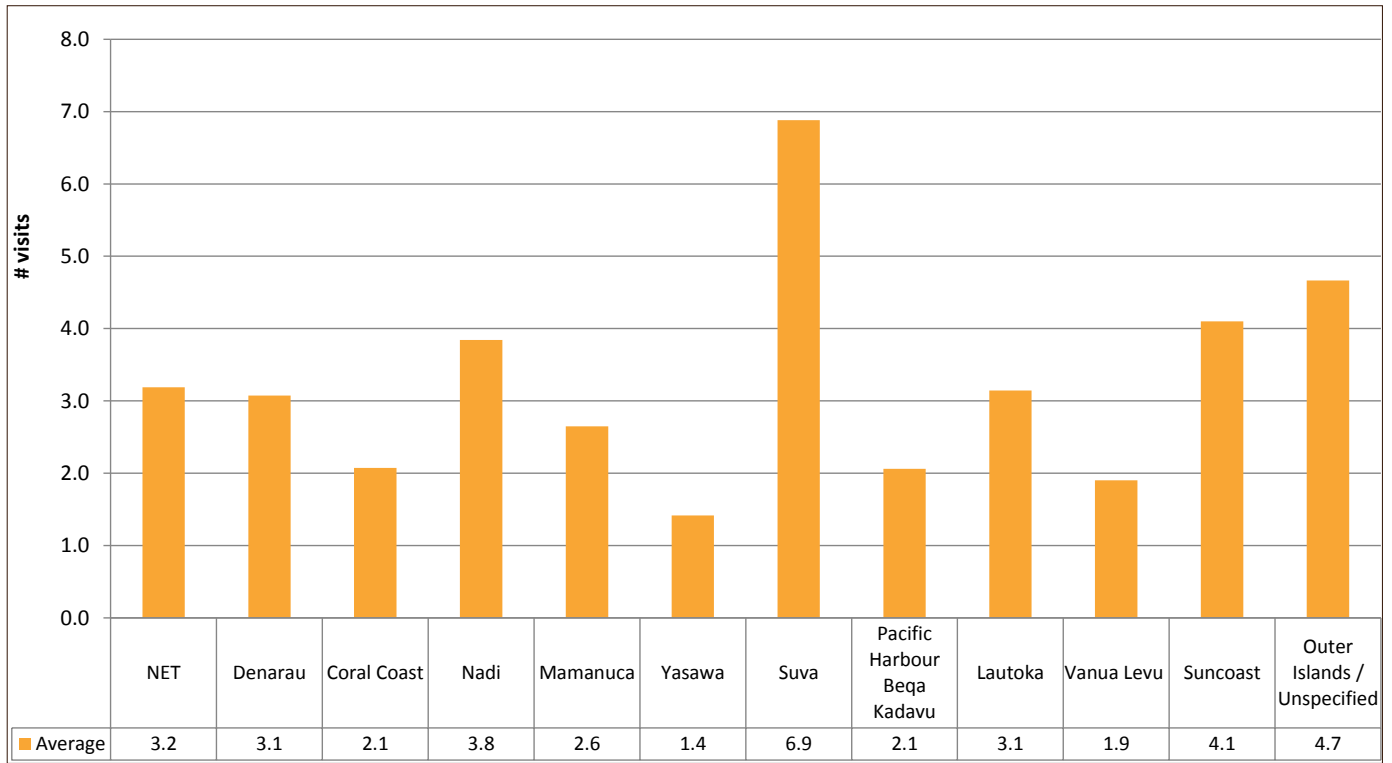
Most Provinces are close to the average with the exception of Rewa which has a higher average of 6.0 visits.





Chart 23: Q80 & Q82 Average visits by Tourism Area

Base: 3,363



Base: All visitors

Average number of visits is higher for:

- Suva (6.9)
- Suncoast (4.1)

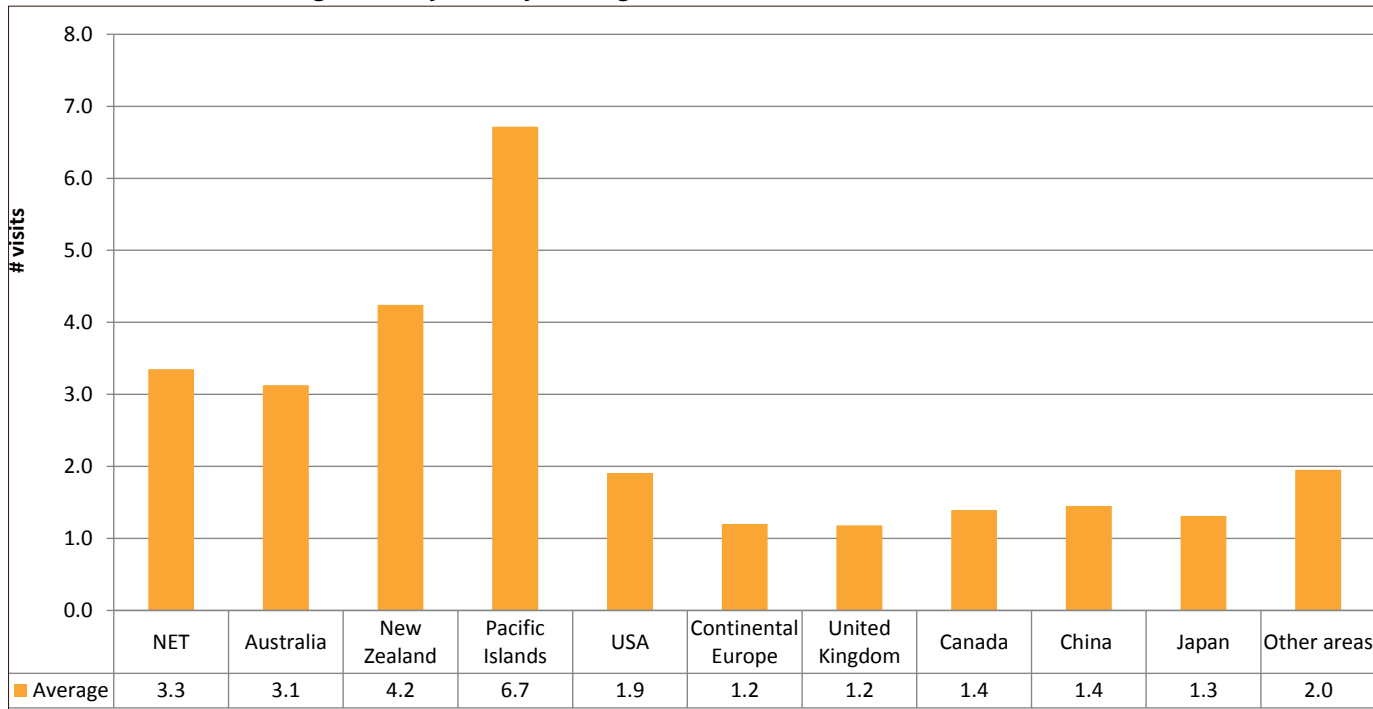
Average number of visits is lower for:

- Yasawa (1.4)
- Vanua Levu(1.9)



Chart 24: Q80 & Q82 Average visits by country and region of residence

Base: 4,104



Base: All visitors

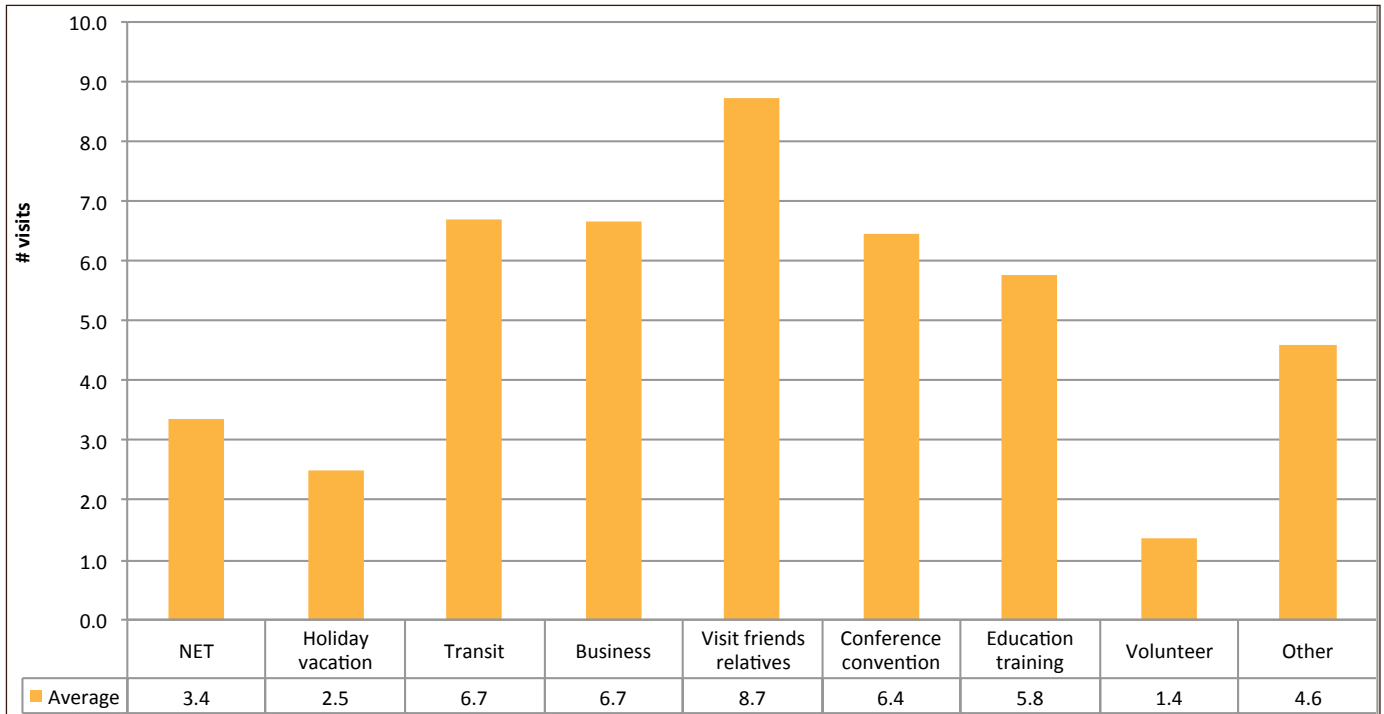
- Average number of visits is higher for visitors from:
- Pacific Islands (6.7)
 - New Zealand (4.2)





Chart 25: Q80 & Q82 Average visits by main reason for visit

Base: 4,098



Base: All visitors

Average number of visits to Fiji is lower for visitors travelling for:

- Volunteer (1.4)
- Holiday/vacation (2.5)

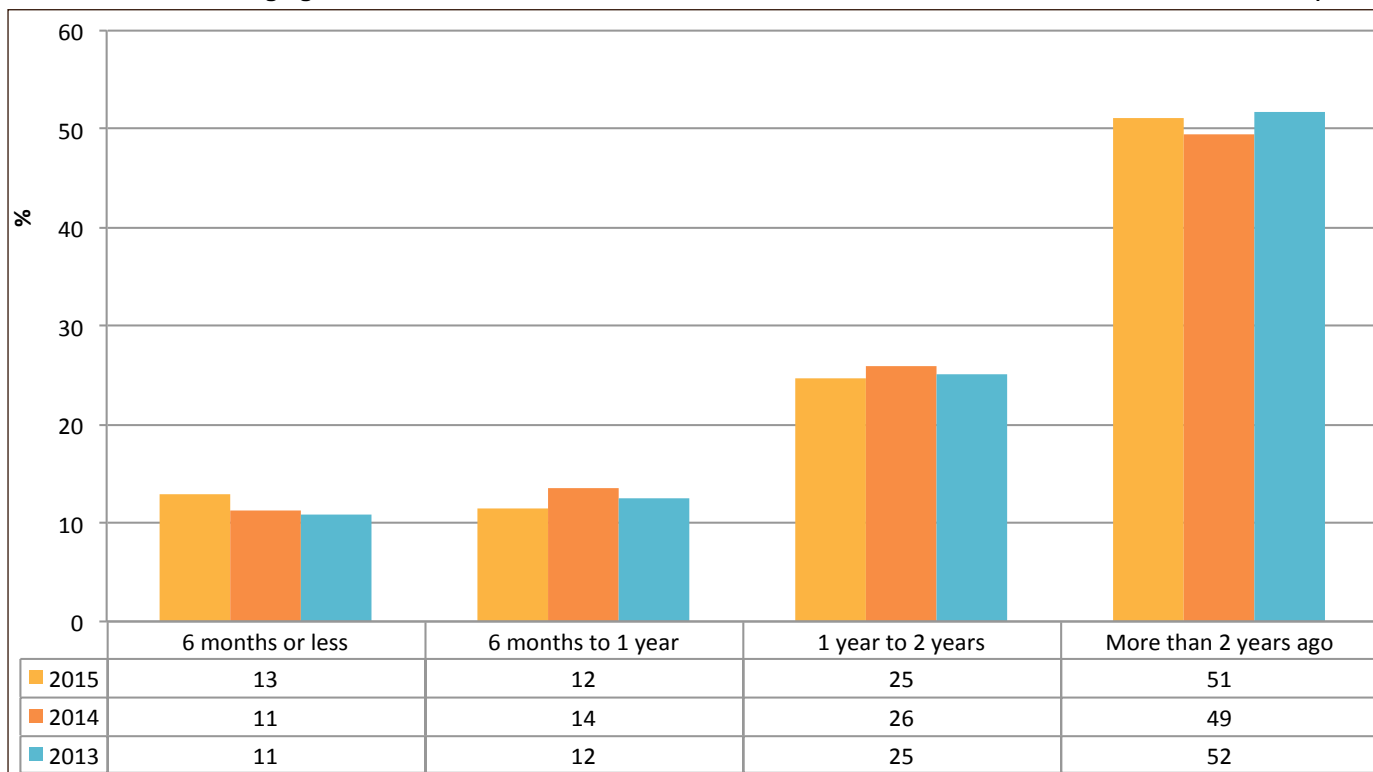
Visitors are most likely to have multiple visits to Fiji when visiting for:

- Visiting friends and relatives (8.7)
- Business (6.7)
- Transit (6.7)
- Conference/convention (6.4)
- Education/training (5.8)



Chart 26: Q83 How long ago was the last visit

Base: 1,245 (2015)



Base: Previous visits

In 2015, fifty percent (50%) of previous visitors have been to Fiji in the last two years.

Those who have visited in the last two years are more likely to visit the Provinces of:

- Rewa (67%)
- Ba (52%)

Those who have visited in the last two years are more likely to have visited the Tourism Areas of:

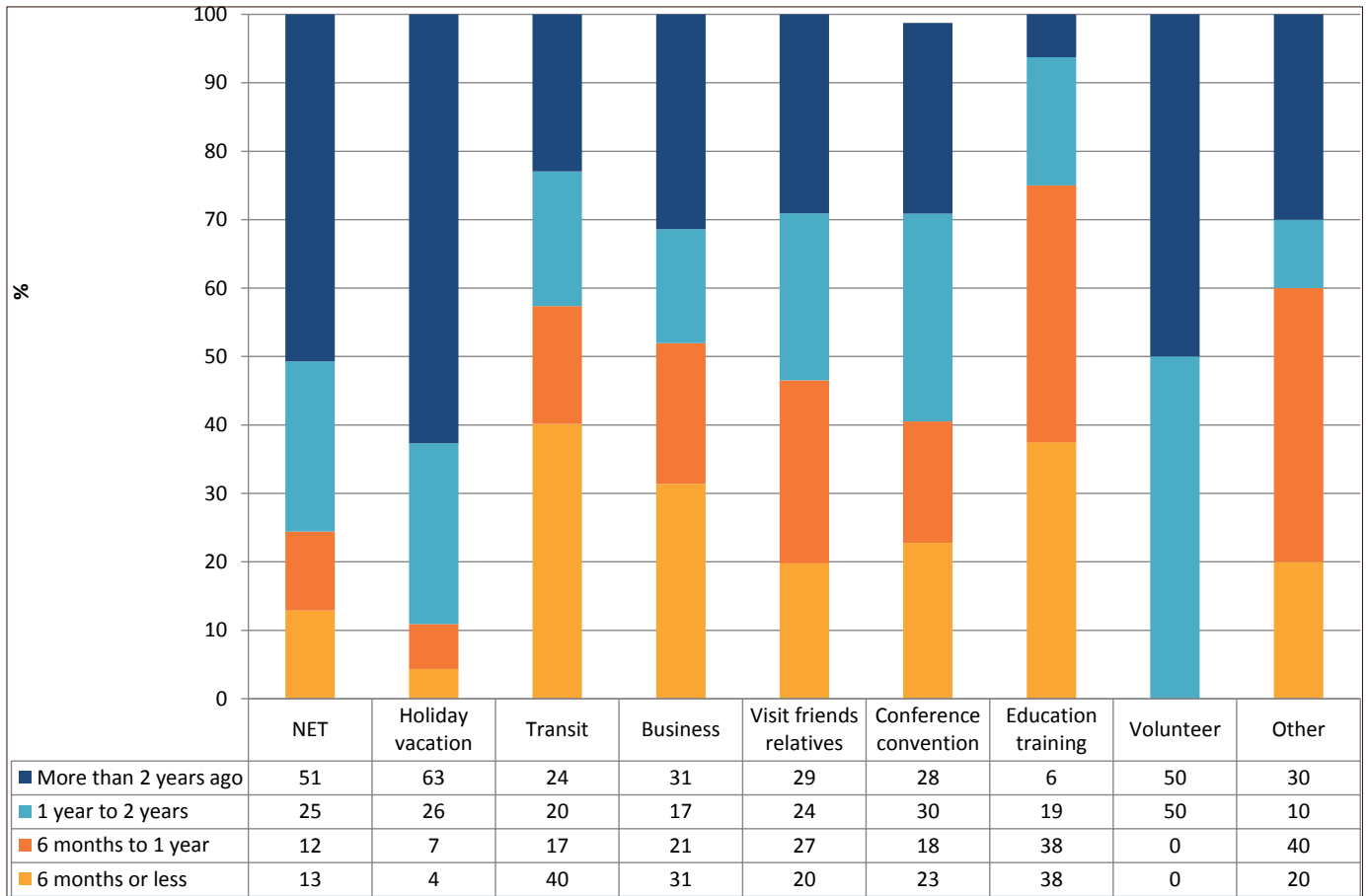
- Suva (70%)
- Nadi (64%)

The percentage of last visit has not significantly changed over the three years.



Chart 27: Q83 How long ago was the last visit by main reasons for visit

Base: 1,241



Base: Previous visits

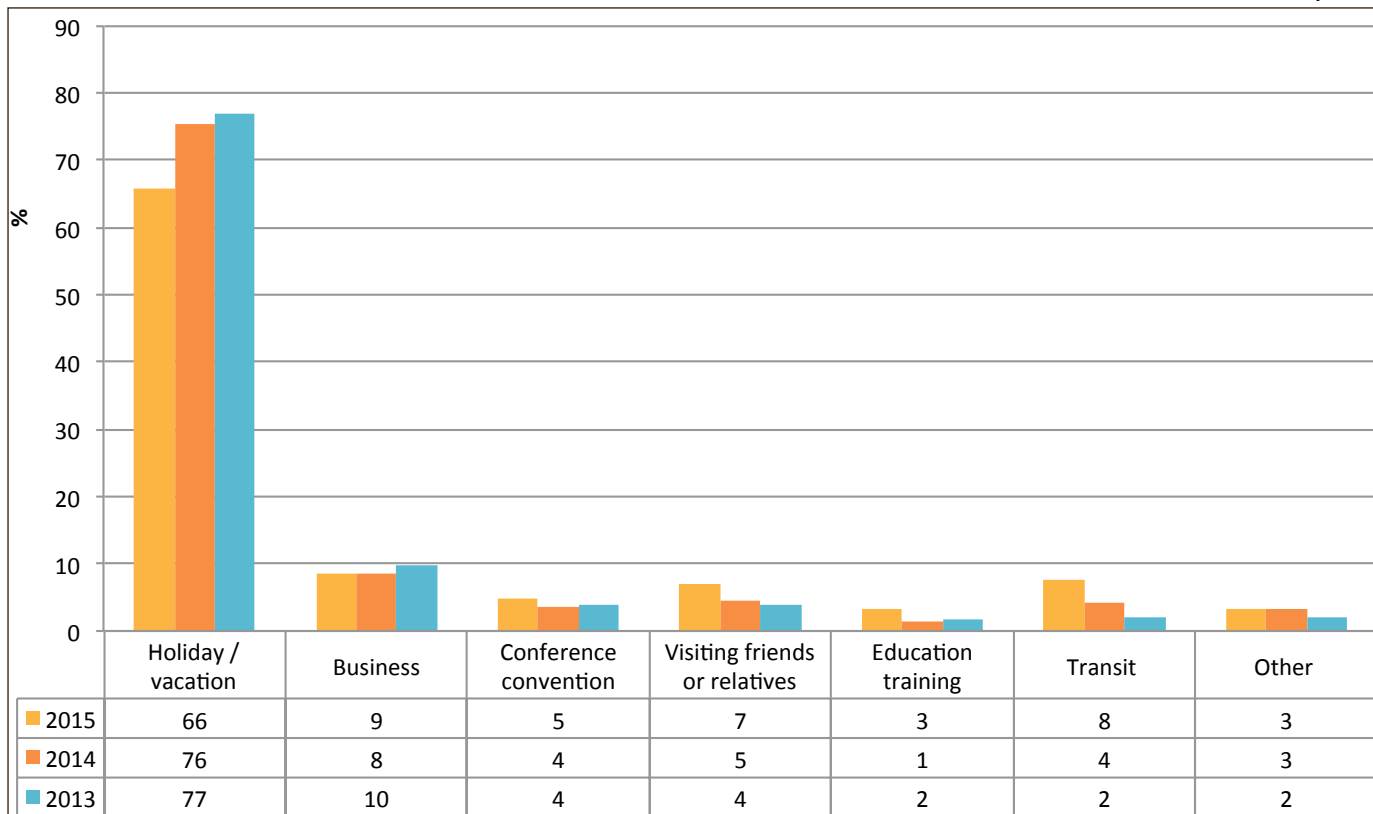
Those who have visited Fiji in the last two years are more likely to come back for:

- Education/training (94%)
- Transit (77%)
- Visiting friends/relatives (71%)
- Conference/convention (71%)
- Business (69%)



Chart 28: Q84 Reason for last visit

Base: 1,639 (2015)



Base: Previous visits

In 2015, the main reason for last visit was 'holiday/vacation' (66%).

The main reasons for last visit which noted increases over the three years include 'visiting friends and relatives' and 'transit'.

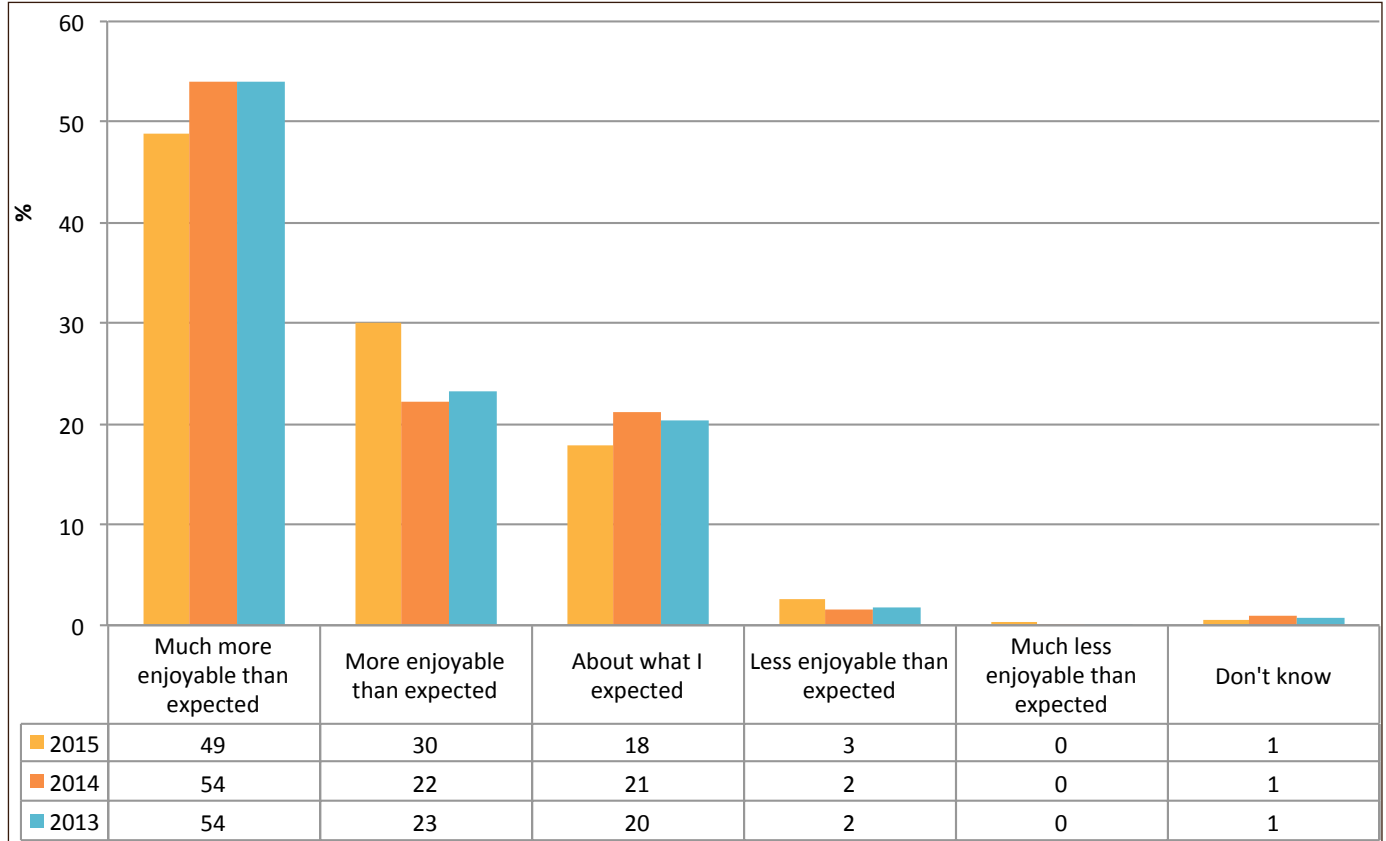
'Holiday/vacation' noted a decrease over the three years while 'business' and 'education/training' noted decreases from 2013 to 2014 and an increase from 2014 to 2015.



4.8 Expectations of Fiji visits

Chart 29: Q81 How Fiji compared to expectations

Base: 2,376 (2015)



Base: First time visitors

In 2015, almost half (49%) of first time visitors found their visit 'much more enjoyable than expected' while thirty percent (30%) found their visit 'more enjoyable than expected'. Few (3%) found Fiji 'less enjoyable than expected'.

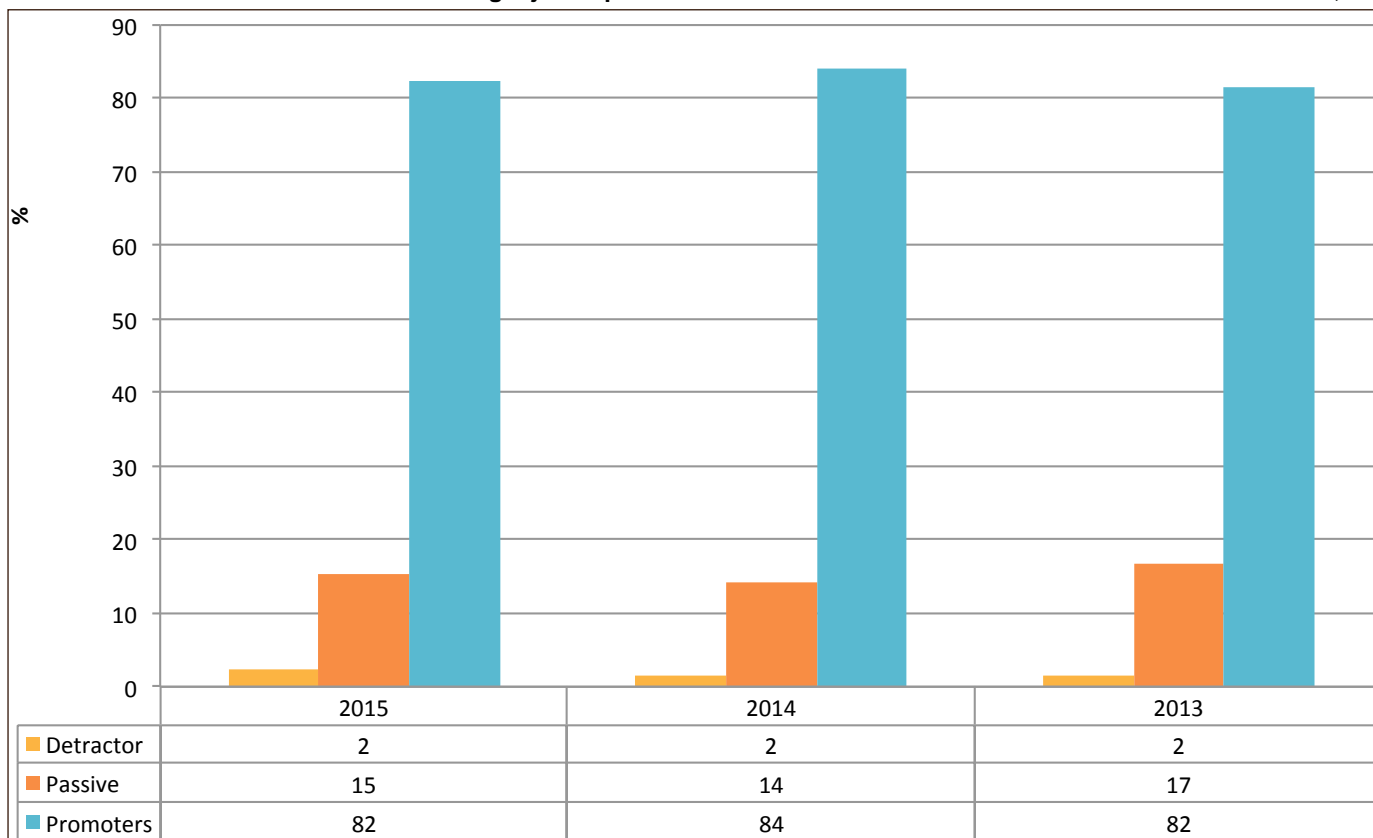
The percentage of visitors that found their first visit to be 'more enjoyable than expected' slightly decreased from 2013 to 2014 and increased from 2014 to 2015 while the percentage of visitors that found their visit to be 'much more enjoyable than expected' did not change from 2013 to 2014 and decreased from 2014 to 2015.



4.9 Recommendation of Fiji as a place to visit

Chart 30: Q87 Likelihood of recommending Fiji as a place to visit

Base: 4,061



Base: All visitors

Interviewees were asked to rate their likelihood of recommending Fiji as a place to visit on a scale of 0 to 10 (0 = not likely at all and 10 = extremely likely). These ratings are grouped as:

- 0 to 6 = Detractor
- 7 or 8 = Passive
- 9 or 10 = Promoters

As shown in the chart above, eighty-two percent (82%) of visitors are likely to give a high recommendation of Fiji as a place to visit to family or friends in 2015.



4.9.1 Net Promoter Score

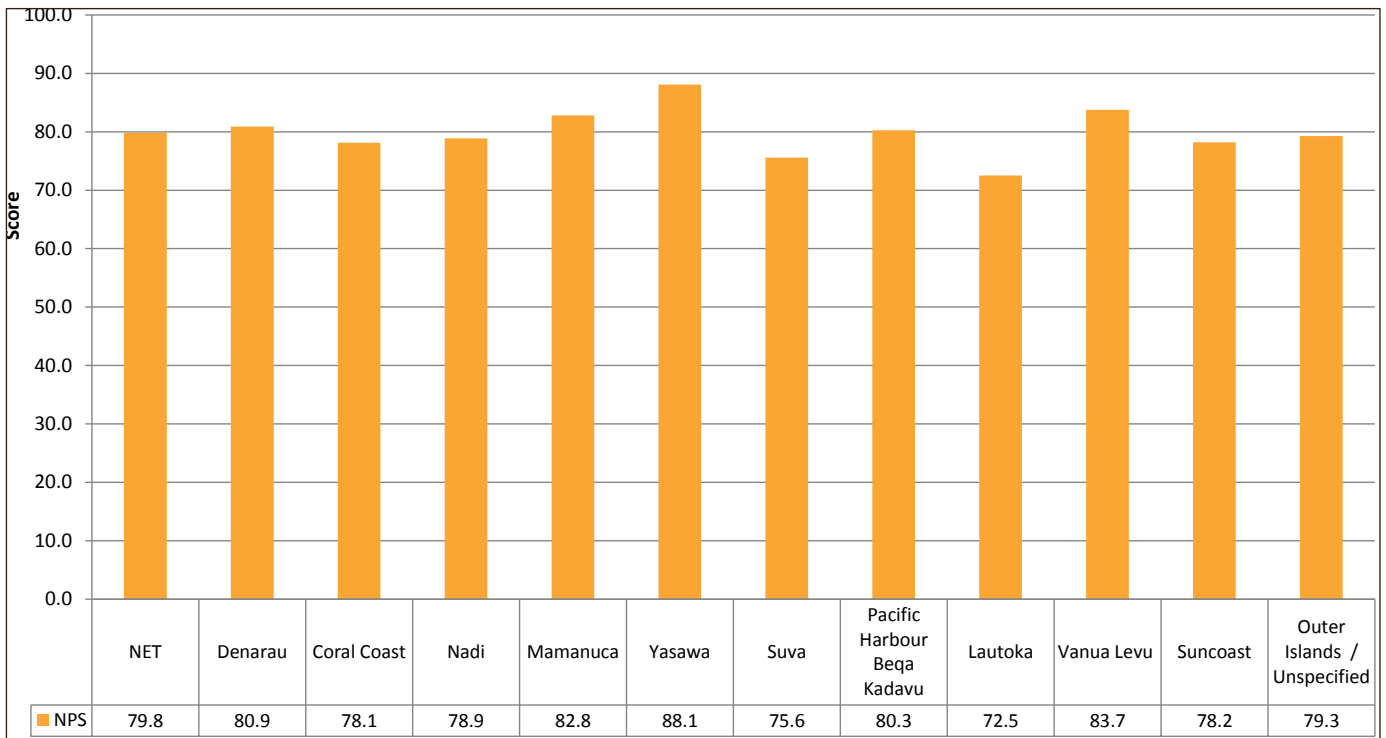
Fiji has an extremely high Net Promoter Score (NPS) of 80.0.

The NPS is calculated by subtracting the percentage of visitors that gave a rating recommendation of 6 or lower from visitors that gave a rating of 9 or 10.

There are no significant differences by Provinces visited with the exception of Cakaudrove that has a NPS of 89.3.

Chart 31: Q87 Net Promoter Score by Tourism Area

Base: 3,877



Base: All visitors

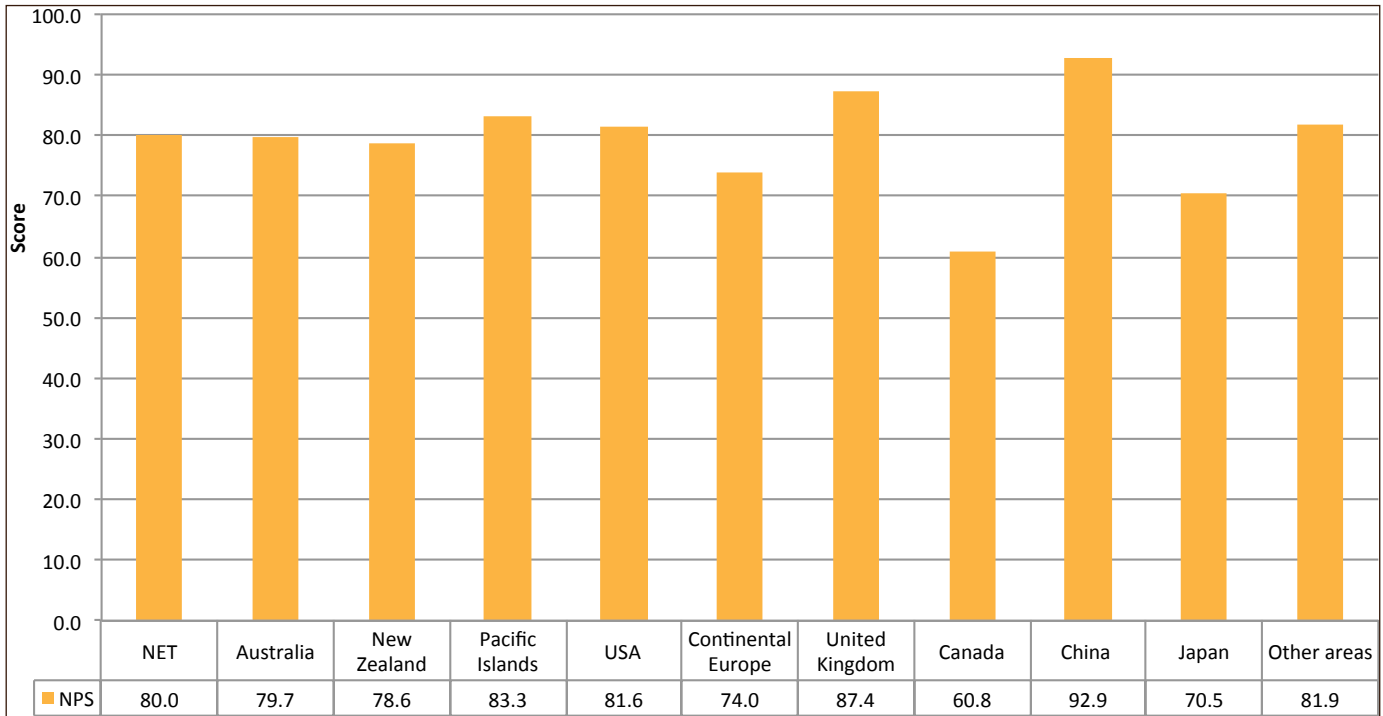
The Net Promote Score is higher for:

- Yasawa (88.1)
- Mamanuca (82.8)



Chart 32: Q87 Net Promoter Score by country and region of residence

Base: 4,047



Base: All visitors

The Net Promoter Score is significantly higher for visitors from:

- China (92.9)
- United Kingdom (87.4)

The Net Promoter Score is significantly lower for visitors from:

- Canada (60.8)
- Japan (70.5)





4.10 Impressions of Fiji

Visitors are asked their favourable and unfavourable impressions of Fiji. These are unprompted and coded into categories.

4.10.1 Favourable impressions

Word Cloud 1: Favourable Impressions of Fiji

Base: 4,100



Base: All visitors

The word cloud above is composed of favourable impressions of Fiji by visitors where the size of each word indicates its frequency or importance.



Table 10: Q85 Favourable impressions of Fiji

Base: 4,100

| | % |
|-------------------------------|----|
| The people | 81 |
| Hospitality | 73 |
| Relaxing/peaceful | 45 |
| The climate/weather | 44 |
| The scenery/nature | 43 |
| The beaches | 34 |
| Clear/beautiful water | 30 |
| Service at hotel/staff | 24 |
| The islands | 24 |
| Accommodation at hotel/resort | 22 |
| Snorkelling | 17 |
| Good food | 16 |
| Fiji time | 13 |
| Culture/craft | 9 |
| Activities | 6 |
| Coral reefs | 6 |
| Everything | 5 |

| | % |
|---------------------------------------|---|
| Shopping | 5 |
| Swimming | 5 |
| The way of life | 5 |
| Good value for money | 5 |
| Music/singing | 4 |
| Good for kids/family | 4 |
| Villages | 3 |
| Safe | 3 |
| Clean environment/beaches/coast | 3 |
| Scuba diving | 2 |
| Kava | 2 |
| Well located/accessible/close to home | 1 |
| Facilities at hotel/resort | 1 |
| Transport good/easy/cheap | 1 |
| Cruise | 1 |
| Level of development | 1 |
| Other | 5 |

Base: All visitors

The most favourable impressions of Fiji by visitors are:

- The people (81%)
- Hospitality (73%)





4.10.2 Unfavourable impressions

Word Cloud 2: Unfavourable impressions of Fiji

Base: 4,043



Base: All visitors

The word cloud above is composed of unfavourable impressions of Fiji by visitors where the size of each word indicates its frequency or importance.



Table 11: Q86 Unfavourable impressions of Fiji
Base: 4,043

| | % |
|--|----|
| Nothing | 66 |
| Too expensive | 8 |
| Insects & bugs | 4 |
| The climate/weather | 3 |
| Service at hotel/slow service | 3 |
| Quality of food/variety of food | 3 |
| Shopkeepers/traders | 3 |
| Harassment on street to buy | 3 |
| Dirty/untidy/pollution | 3 |
| Bad roads | 3 |
| Poor holiday resort experience | 2 |
| Other | 2 |
| Crime / feel unsafe/theft | 1 |
| Airport facilities/customs/rude staff | 1 |
| Taxi expensive/driving standard/unprofessional | 1 |
| Airline | 1 |
| F&B cost - expensive | 1 |

| | % |
|--------------------------------------|---|
| Transport/transfers | 1 |
| Beach poor | 0 |
| Poor internet/no free Wi-Fi | 0 |
| Need better information | 0 |
| Illness/medical facilities | 0 |
| Activities poor/lack of availability | 0 |
| Poverty | 0 |
| Low wages for staff | 0 |
| Need local food | 0 |
| Poor shopping | 0 |
| Water quality | 0 |
| Dangerous driving | 0 |
| Coral/dead coral | 0 |
| Credit card fees | 0 |
| Hotel tax/too high | 0 |
| Bed bugs | 0 |

Base: All visitors

Categories that are less than 0.5% are shown as 0%

Two-thirds of visitors (66%) had no unfavourable impressions of Fiji. The most common unfavourable impressions noted by visitors include:

- Too expensive (8%)
- Insects and bugs (4%)
- The climate/weather (3%)
- Service at hotel/slow service (3%)
- Quality of food/variety of food (3%)
- Shopkeepers/traders (3%)
- Harassment on the street to buy (3%)

Differences by Province

- Insects and bugs is higher for Nadroga/Navosa (4%)
- Shopkeepers/traders is higher for Rewa (6%)
- Bad roads is higher for Cakaudrove (8%)
- Harassment on street to buy is higher for Rewa (7%)

Differences by Tourism Area

- Too expensive is higher for Denarau (15%)
- Service at hotel/slow service is higher for Mamanuca (5%)
- Quality of food is higher for Pacific Harbour/Beqa/Kadavu (12%) and Yasawa (9%)
- Shopkeepers/traders is higher for Suva (6%)
- Dirty/untidy/pollution is higher for Lautoka (7%) and Nadi (4%)

Differences by country/region of residence

- Too expensive is higher for visitors from New Zealand (13%) and Australia (10%)
- Service at hotel/slow service is higher for visitors from Japan (17%)
- Insects and bugs is higher for visitors from Japan (33%) and New Zealand (4%)

Food quality

Food has the lowest satisfaction rating for accommodation; however, the favourable and unfavourable impressions put this into perspective. 'Good food' is mentioned as a favourable impression by sixteen percent (16%) of visitors while three percent (3%) mention 'quality of food/variety of food' and one percent (1%) noted 'food and beverage cost' as an unfavourable impression.



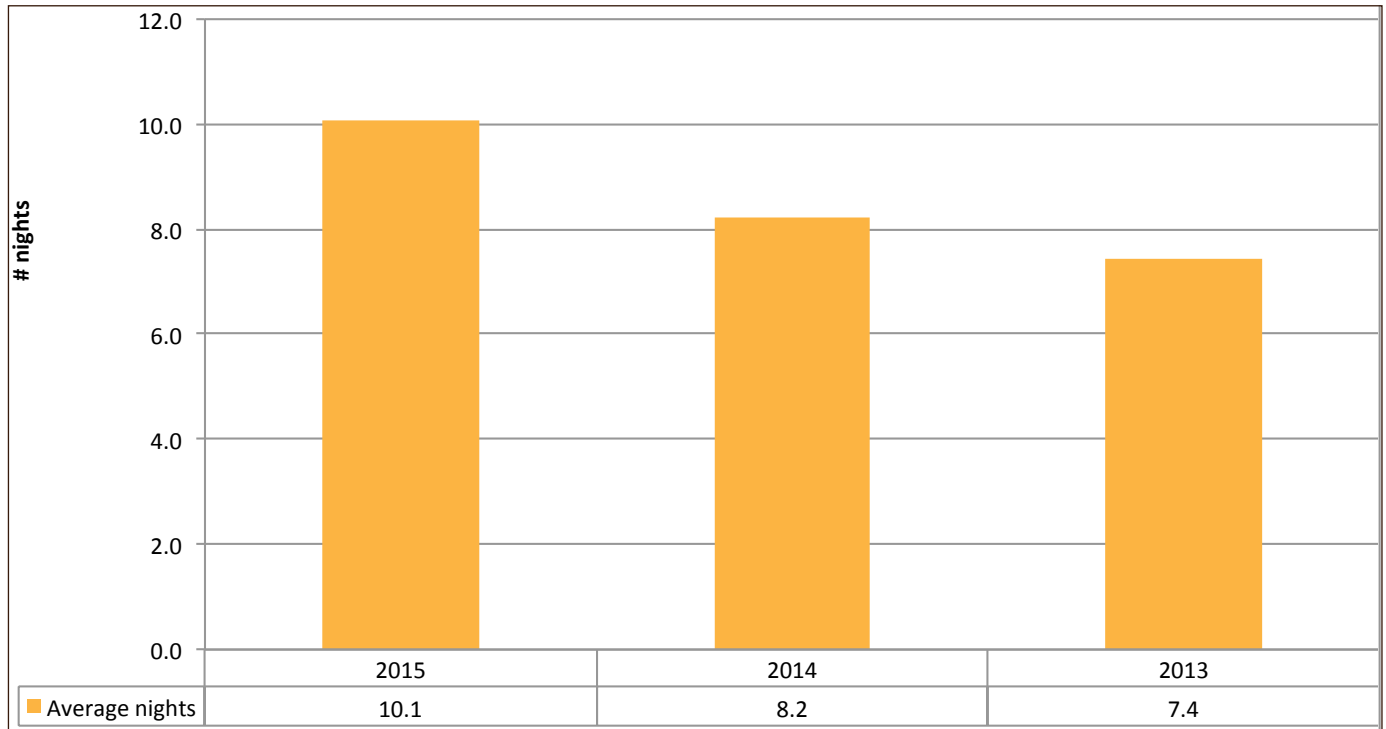
4.11 Average length of stay in Fiji

In 2015, the average length of stay in Fiji was 10.1 nights.

Note that the average length of stay is 9.4 nights for visitors that could be allocated to a Province and Tourism Area.

Chart 33: Q4 Average length of stay

Base: 4,074 (2015)

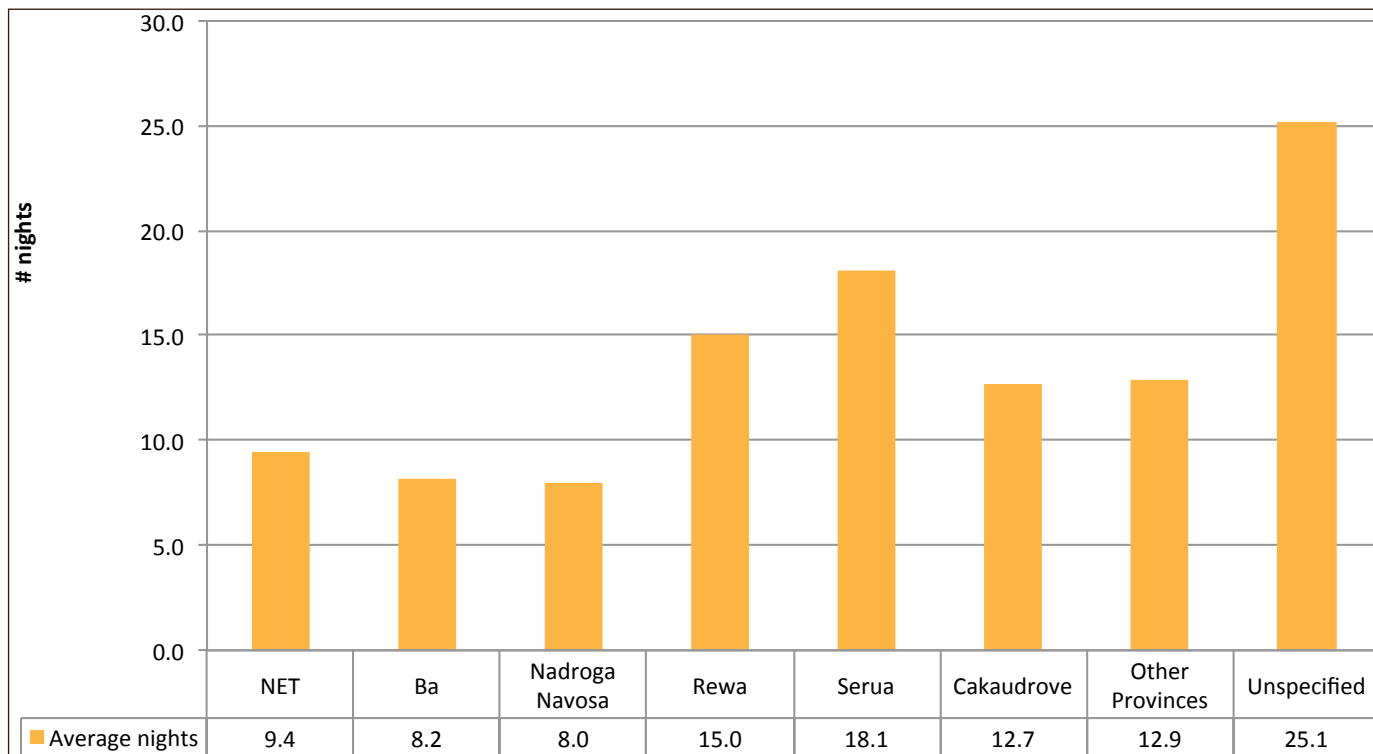


Base: All visitors

The average length of stay in Fiji has progressively increased over the three years.

Chart 34: Q4 Average length of stay by Province

Base: 3,900



Base: All visitors

The average length of stay in Fiji is higher for:

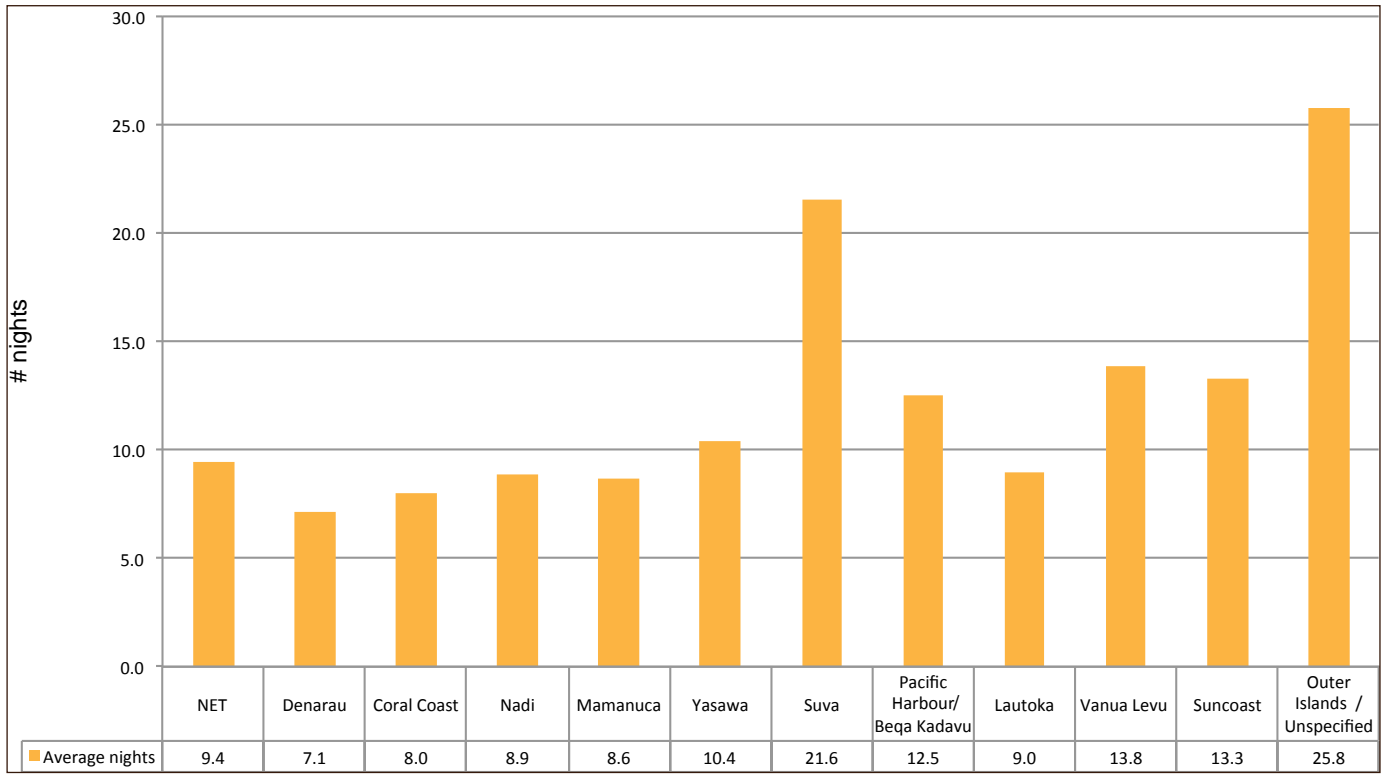
- Serua (18.1)
- Rewa (15.0)
- Cakaudrove (12.7)





Chart 35: Q4 Average length of stay by Tourism Area

Base: 3,900



Base: All visitors

The average length of stay is higher for:

- Suva (21.6)
- Vanua Levu (13.8)
- Suncoast (13.3)
- Pacific Harbour/Beqa/Kadavu (12.5)

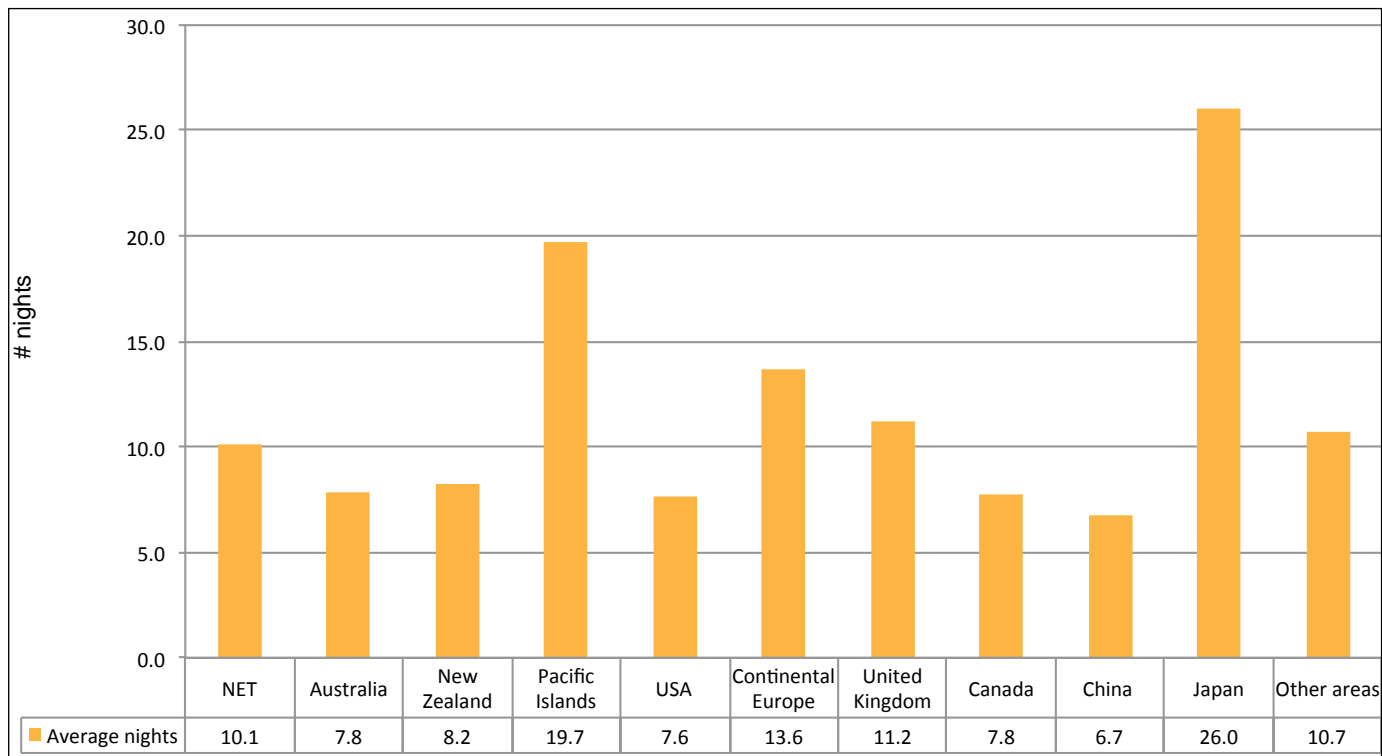
The average length of stay is lower for:

- Denarau (7.1)
- Coral Coast (8.0)
- Mamanuca (8.6)



Chart 36: Q4 Average length of stay by country and region of residence

Base: 4,074



Base: All visitors

The average length of stay is higher for visitors from:

- Japan (26.0)
- Pacific Islands (19.7)
- Continental Europe (13.6)

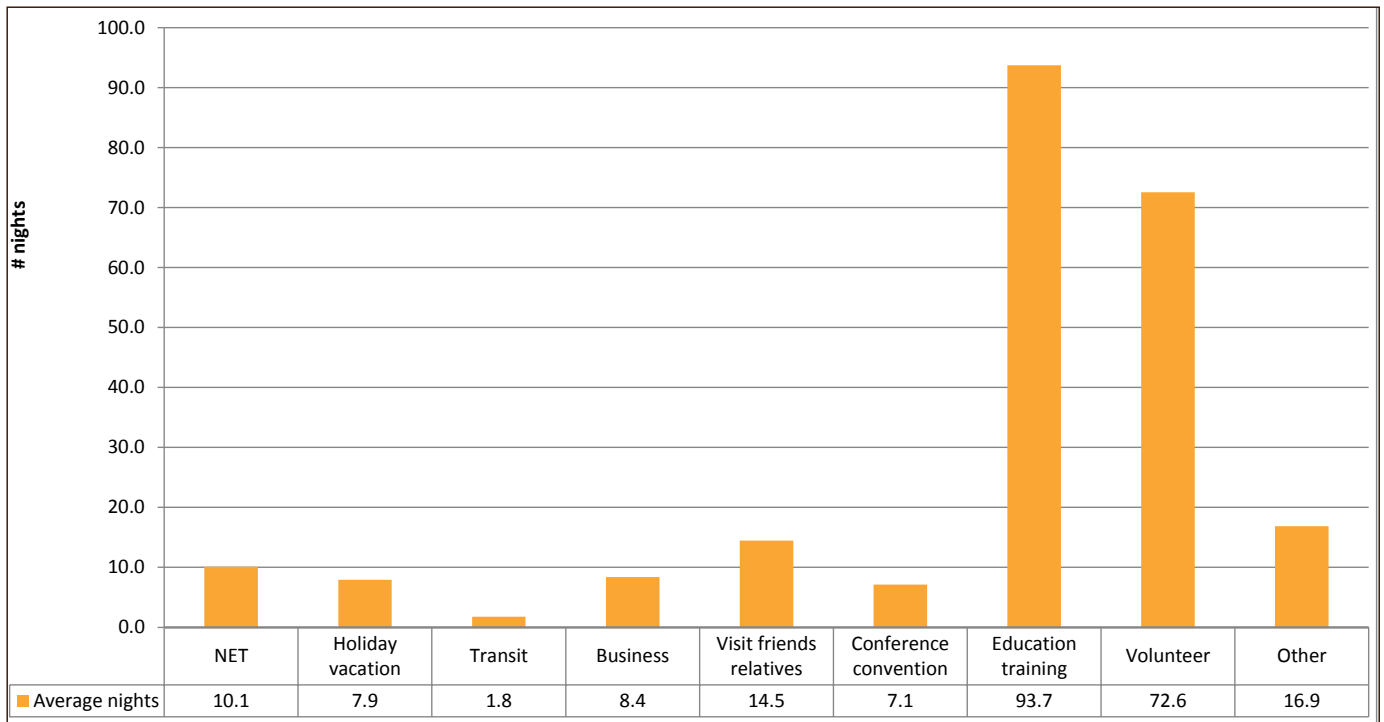
The average length of stay is lower for visitors from:

- China (6.7)
- USA (7.6)
- Australia (7.8)
- Canada (7.8)



Chart 37: Q4 Average length of stay by main reason of visit

Base: 4,074



Base: All visitors

The average length of stay is higher for:

- Education/training (93.7)
- Volunteer (72.6)
- Visiting friends/relatives (14.5)

The average length of stay is lower for:

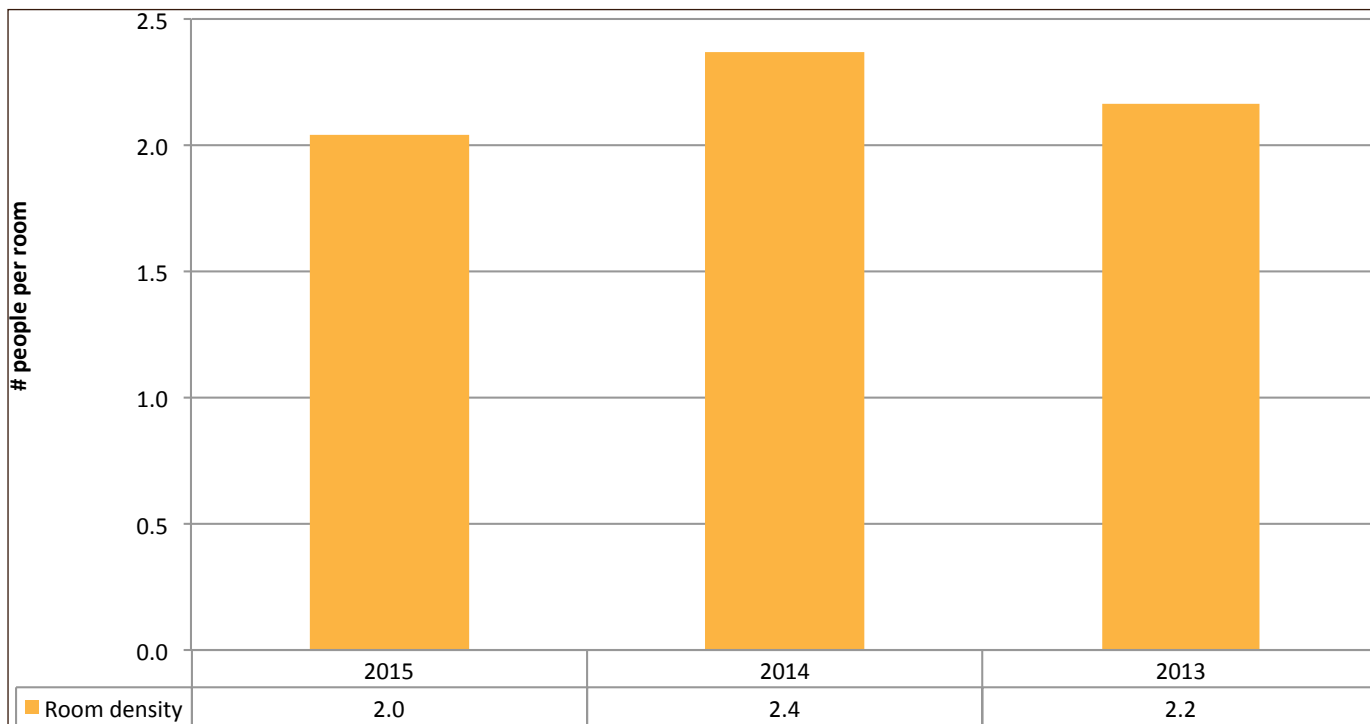
- Transit (1.8)
- Conference/convention (7.1)
- Holiday/vacation (7.9)

4.12 Room density

Room density is calculated by dividing the number of people in a travelling group by the number of rooms used.

Chart 38: Room density

Base: 3,413 (2015)



Base: All visitors in paid accommodation

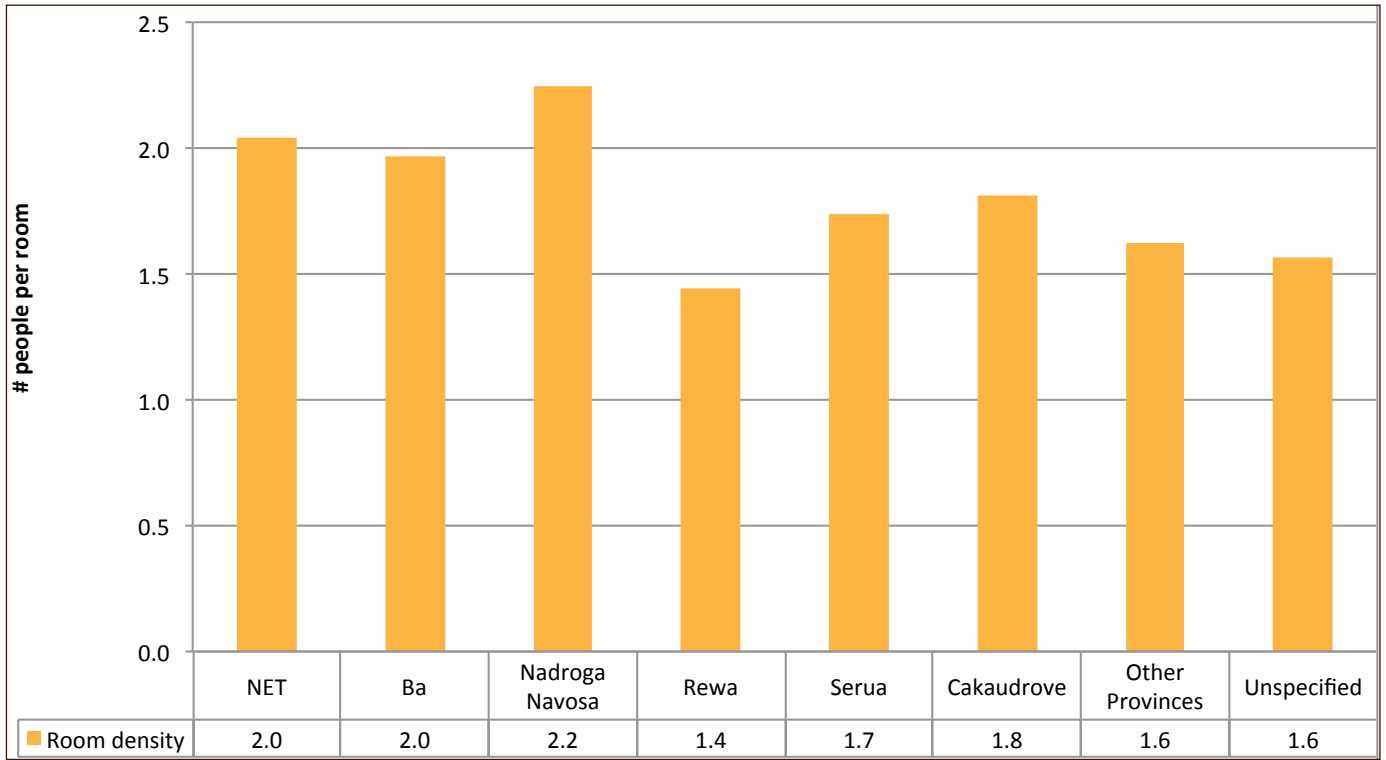
The average room density in 2015 was 2.0 people and this has not significantly changed over the three years.





Chart 39: Room density by Province

Base: 3,377

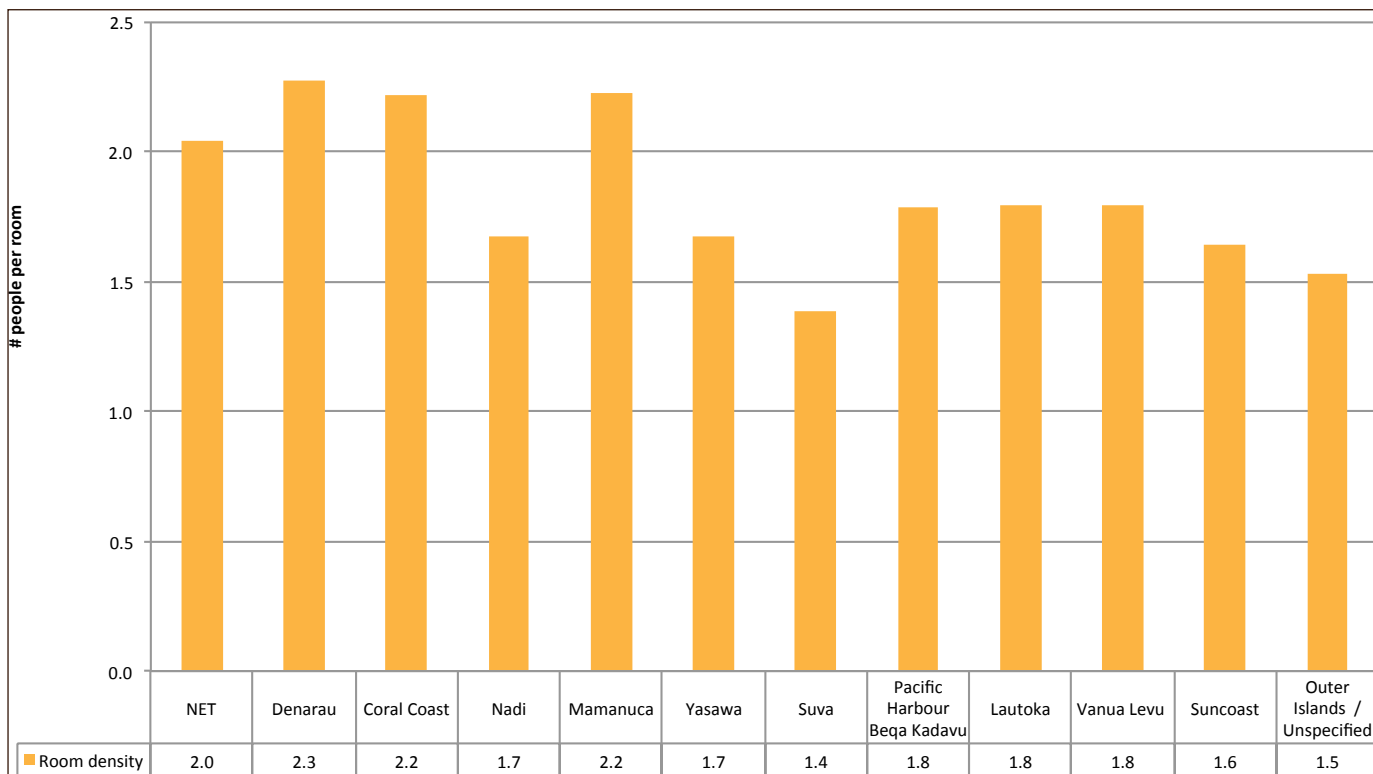


Base: All visitors in paid accommodation

The average room density is similar for all Provinces with the exception of Nadroga/Navosa which have a higher room density of 2.2 people.

Chart 40: Room density by Tourism Area

Base: 3,377



Base: All visitors in paid accommodation

Room density is higher for the Tourism Areas of:

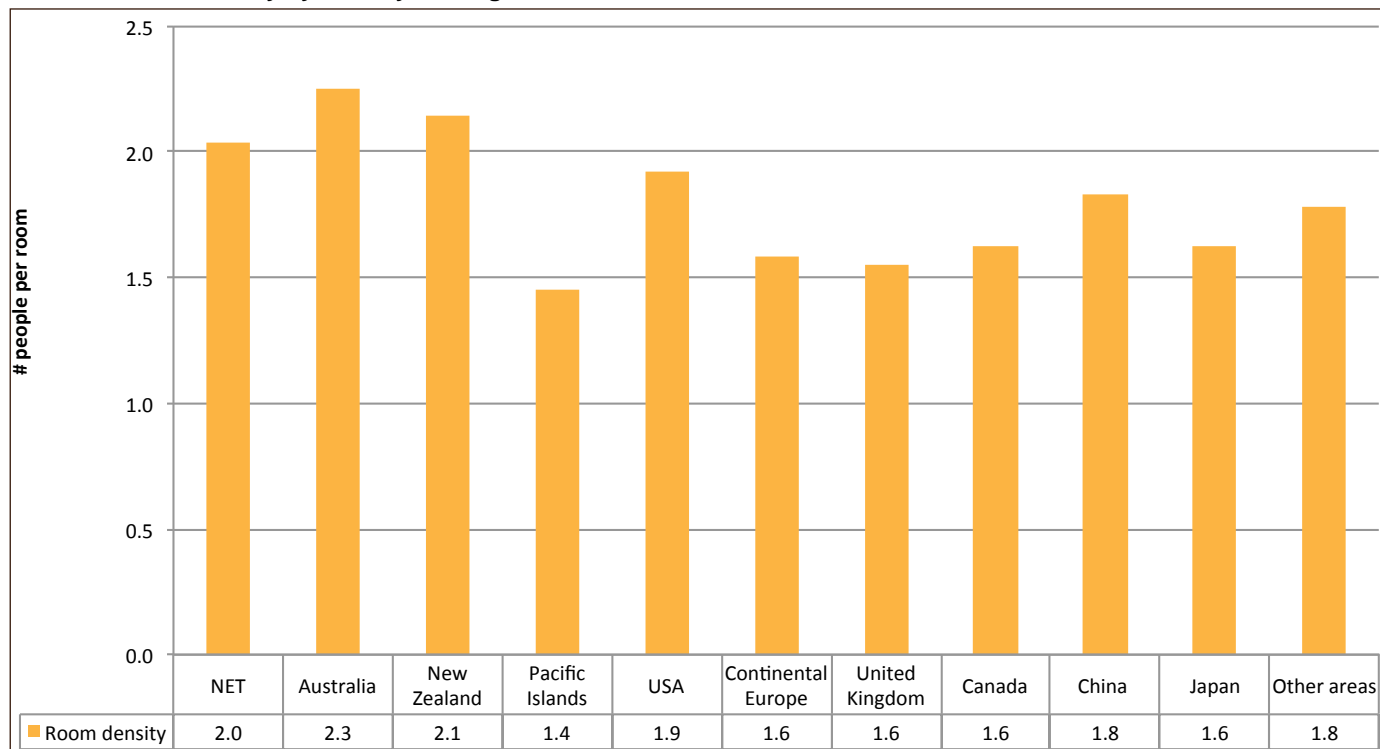
- Denarau (2.3)
- Coral Coast (2.2)
- Mamanuca (2.2)





Chart 41: Room density by country and region of residence

Base: 3,412



Base: All visitors in paid accommodation

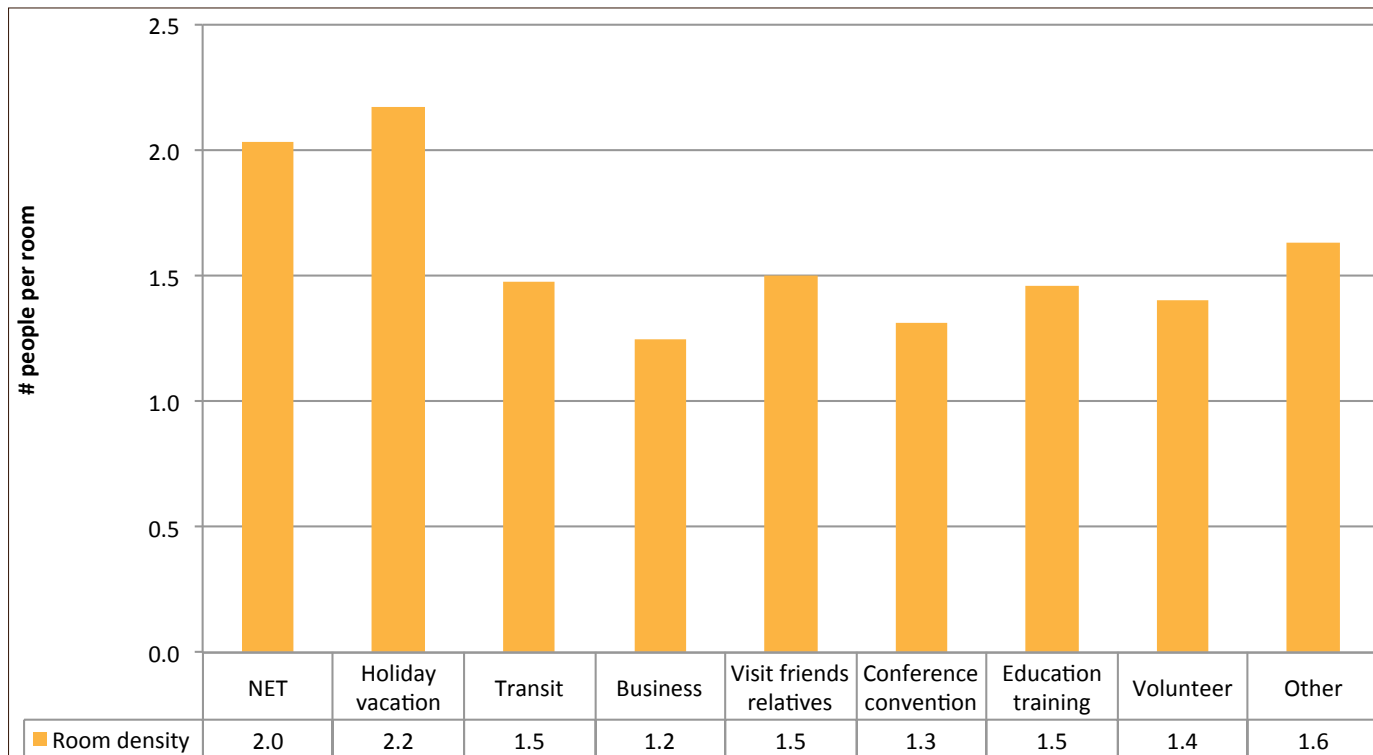
Room density is lower for visitors from all countries and region of residence with the exception of:

- Australia (2.3)
- New Zealand (2.1)



Chart 42: Room density by main reason for visit

Base: 3,413



Base: All visitors in paid accommodation

Room density is higher for those on 'holiday/vacation' (2.2) and lower for all other main reasons for visit.



5 EXPENDITURE

5.1 Estimated total expenditure

Estimated total expenditure from visitors in 2015 is \$1,578,976,633. This compares to:

- \$1,507,900,912 in 2014
- \$1,435,521,271 in 2013

The method for spend calculation is described in detail in the Appendix: Definitions and Calculations.

Table 12: Estimated spend by category

Base: 4,123

| Category | Estimated total spend |
|--------------------------------|------------------------|
| Hotel | |
| Total package and pre-paid | \$1,086,408,850 |
| Additional accommodation | \$36,972,349 |
| Additional food and drinks | \$140,559,776 |
| Additional expenditure | \$73,394,048 |
| Total hotel expenditure | \$1,337,335,024 |
| Transfers | \$11,866,834 |
| Non-hotel F&B | \$65,955,136 |
| Retail purchases | \$106,006,125 |
| Activities | \$21,671,322 |
| Tours | \$8,689,491 |
| Cruises | \$6,753,970 |
| Rental cars | \$6,478,812 |
| Public transport | \$13,751,542 |
| <i>Domestic airfare*</i> | <i>\$468,377</i> |
| TOTAL EXPENDITURE | \$1,578,976,633 |

Base: All visitors

**Domestic airfare n=7 and is not reliable*

Spend in hotel accommodation accounted for eighty-five percent (85%) of the total expenditure. Other key areas of expenditure include:

- Retail purchases
- Non-hotel food and beverages (includes those who did not stay in paid accommodation or are long-term visitors)
- Activities
- Public Transport
- Transfers

5.2 Estimated spend by Province

Table 13: Estimated total spend by Province

Base: 3,923

| Province | Estimated total spend |
|--------------------------|------------------------|
| Ba | \$655,986,176 |
| Nadroga/Navosa | \$590,627,510 |
| Rewa | \$97,453,927 |
| Cakaudrove | \$47,551,185 |
| Serua | \$40,218,819 |
| Other Provinces | \$69,483,029 |
| Unspecified | \$77,187,610 |
| <i>Domestic airfare*</i> | \$468,377 |
| Total Expenditure | \$1,578,976,633 |

Base: All visitors

**Domestic airfare n=7 and is not reliable*

Spend by Province is derived from the location of accommodation which does not necessarily mean that all expenditure took place in that Province, for example, shopping could also include purchases at Nadi International Airport. This analysis provides an overall estimate of the value of visitors to each Province.

The two Provinces with the highest estimated spend are Ba and Nadroga/Navosa accounting for forty-two percent (42%) and thirty-seven percent (37%) respectively of the total expenditure.

The full spend data by Province is included in Appendix: Expenditure.





5.3 Estimated spend by Tourism Area

Table 14: Estimated spend by Tourism Area

Base 3,923

| Tourism Area | Estimated total spend |
|-----------------------------|------------------------------|
| Denarau | \$371,020,017 |
| Coral Coast | \$292,226,484 |
| Mamanuca | \$251,587,532 |
| Nadi | \$248,392,352 |
| Yasawa | \$105,713,254 |
| Suva | \$67,623,784 |
| Pacific Harbour/Beqa/Kadavu | \$57,732,243 |
| Lautoka | \$48,012,237 |
| Vanua Levu | \$43,770,558 |
| Suncoast | \$16,928,210 |
| Outer Islands/Unspecified | \$75,501,584 |
| <i>Domestic airfare*</i> | <i>\$468,377</i> |
| Total Expenditure | \$1,578,976,633 |

Base: All visitors

**Domestic airfare n=7 and is not reliable*

Similarly with Province, not all expenditure may have taken place in the Tourism Area as the spend allocation is based on the accommodation location. However, it shows the value of visitors to each Tourism Area. Lautoka includes cruising operations from the port that also provide accommodation.

The largest estimated spend is in Denarau which accounted for twenty-three (23%) of the total expenditure. This is followed by:

- Coral Coast (19%)
- Mamanuca (16%)
- Nadi (16%)

The full spend data by Tourism Area is included in Appendix: Expenditure.



5.4 Estimated spend by country of residence

Table 15: Estimated spend by country/region of residence

Base: 4,109

| Country | Estimated total spend | Per person spend |
|--------------------------|------------------------|------------------|
| Australia | \$860,630,787 | \$2,415 |
| New Zealand | \$253,307,686 | \$1,953 |
| USA | \$110,135,835 | \$2,641 |
| Pacific Islands | \$87,051,725 | \$993 |
| Continental Europe | \$84,285,578 | \$1,693 |
| United Kingdom | \$82,062,239 | \$2,327 |
| China | \$39,133,033 | \$2,196 |
| Japan | \$16,190,332 | \$2,003 |
| Canada | \$10,184,167 | \$1,109 |
| Other areas | \$35,526,873 | \$1,842 |
| <i>Domestic airfare*</i> | <i>\$468,377</i> | - |
| Total Expenditure | \$1,578,976,633 | \$2,092 |

Base: All visitors

**Domestic airfare n=7 and is not reliable*

In this analysis Hong Kong is included under China. Of the 40,174 visitors from China, 658 are from Hong Kong.¹

The two largest markets of Australia and New Zealand accounted for seventy-one percent (71%) of the total expenditure of which Australia has a per-person spend of \$2,415 compared to \$1,953 for visitors from New Zealand.

The highest per-person spend are visitors from USA with an average spend of \$2,641 per visit.



5.5 Estimated spend by main reason for visit

Table 16: Estimated spend by main reason for visit

Base: 4,102

| Main reason for visit | Estimated total spend |
|--------------------------|------------------------|
| Holiday/vacation | \$1,368,703,984 |
| Business | \$50,087,807 |
| Visit friends/relatives | \$49,636,789 |
| Conference/convention | \$34,524,304 |
| Education/training | \$32,722,020 |
| Volunteer | \$22,254,863 |
| Transit | \$16,939,114 |
| Other | \$3,639,375 |
| <i>Domestic airfare*</i> | <i>\$468,377</i> |
| Total Expenditure | \$1,578,976,633 |

Base: All visitors

**Domestic airfare n=7 and is not reliable*

'Holiday/vacation' visitors accounted for seventy-nine percent (79%) of arrivals and eighty-seven (87%) of the total expenditure.

'Business' travel accounts for three percent (3%) of total expenditure while 'visiting friends and relatives' and 'conference/convention' accounted for three percent (3%) and two percent (2%) respectively.

5.6 Estimated spend for holiday/vacation

Table 17: Estimated spend for holiday/vacation

Base:3,179

| Holiday/vacation | Estimated total spend |
|--------------------------|------------------------|
| Rest and relaxation | \$1,081,672,624 |
| Honeymoon | \$116,462,538 |
| Wedding | \$92,285,018 |
| Other | \$78,283,804 |
| Total Expenditure | \$1,368,703,984 |

Base: Visitors for holiday/vacation

It is important to note that 'holiday/vacation' is a subcategory of the 'main reason' for visiting Fiji.

The largest spend are by visitors for 'rest and relaxation' that make up eighty-four percent (84%) of holiday/vacation visitors and an estimated spend of \$1.08 billion. Visitors for 'rest and relaxation' accounted for seventy-nine percent (79%) of the total holiday/vacation expenditure while visitors for a 'honeymoon' and 'wedding' accounted for nine percent (9%) and seven percent (7%) respectively of the total holiday/vacation expenditure.





5.7 Estimated spend on activities

The total estimated expenditure for activities is \$21,671,322 in 2015.

Table 18: Estimated spend on activities

Base: 1,328

| Activity | Estimated spend |
|--------------------------------|---------------------|
| Massage/spa | \$6,431,675 |
| Scuba Diving | \$4,344,261 |
| Jet ski | \$1,586,464 |
| Deep/big game fishing | \$1,433,294 |
| Shopping | \$728,178 |
| Other | \$696,295 |
| Dancing/night club | \$687,290 |
| Parasailing | \$612,772 |
| Hair braiding | \$611,210 |
| Golf | \$547,443 |
| Sky diving | \$463,553 |
| Surfing | \$408,882 |
| Other fishing | \$396,019 |
| Boat ride | \$327,933 |
| Village visit / tour | \$317,274 |
| Manicure/facial | \$251,302 |
| Jet boat | \$249,924 |
| Cinema | \$248,821 |
| Snorkeling | \$240,276 |
| Babysitting | \$205,360 |
| Banana boat | \$154,365 |
| Jet boat - fresh water | \$133,231 |
| Horse riding | \$119,908 |
| Fire walking | \$96,386 |
| Dolphin watching | \$90,689 |
| Boat ride - fresh water | \$52,833 |
| Bushwalking/hiking | \$29,403 |
| Cultural Centre/Fort etc. | \$26,738 |
| Bike riding/cycling | \$23,430 |
| Crab race/frog race | \$20,949 |
| Rafting/Bilibili - fresh water | \$18,377 |
| Sailing/Yachting | \$18,377 |
| Fishing | \$18,377 |
| Coral viewing | \$17,917 |
| Museum visit | \$14,334 |
| Motor bike riding | \$13,783 |
| Kava drinking/ceremony | \$11,394 |
| Swimming | \$9,372 |
| Tennis | \$7,351 |
| Canoeing/kayaking | \$3,675 |
| Gym | \$919 |
| Meke | \$551 |
| Beach walking | \$184 |
| Walking | \$184 |
| Pool/billiards | \$184 |
| Fish feeding | \$184 |
| Total | \$21,671,322 |

Base: Visitors carrying out activities

'Massage/spa' (\$6.4 million), 'scuba diving' (\$4.3 million), 'jet ski' (\$1.5 million) and 'deep/big game fishing' (\$1.4 million) are the key activities for visitors in Fiji.

Many activities are also carried out at no cost, for example 'running/jogging', 'laying on poolside' and 'bird watching' etc.

Caution should be used in interpreting spend on some of the activities due to its low base sizes.

5.8 Retail estimated expenditure

The total estimated expenditure for retail purchases is \$106,006,125 in 2015.

Table 19: Estimated retail spend

Base: 4,171

| Retail area | Total estimated spend |
|----------------------------|-----------------------|
| Souvenirs | \$33,527,478 |
| Clothing | \$23,055,616 |
| Other | \$9,960,665 |
| Jewellery | \$8,046,935 |
| Foodstuffs | \$7,894,302 |
| Locally made handicrafts | \$5,785,244 |
| Alcohol | \$5,676,463 |
| Perfume | \$4,258,646 |
| Shoes/sandals | \$3,475,451 |
| Cigarettes/tobacco | \$1,057,991 |
| Watches/clocks | \$653,858 |
| Handbags/wallets | \$448,506 |
| Cameras & camera equipment | \$443,143 |
| Materials/textiles | \$411,653 |
| Toys/games | \$403,872 |
| Books/stationery | \$354,258 |
| Suitcases/travel bags | \$292,682 |
| Music/videos (CD/DVD/etc.) | \$175,695 |
| Paintings | \$77,534 |
| Film/processing/printing | \$6,133 |
| Total | \$106,006,125 |

Base: All visitors with retail spend

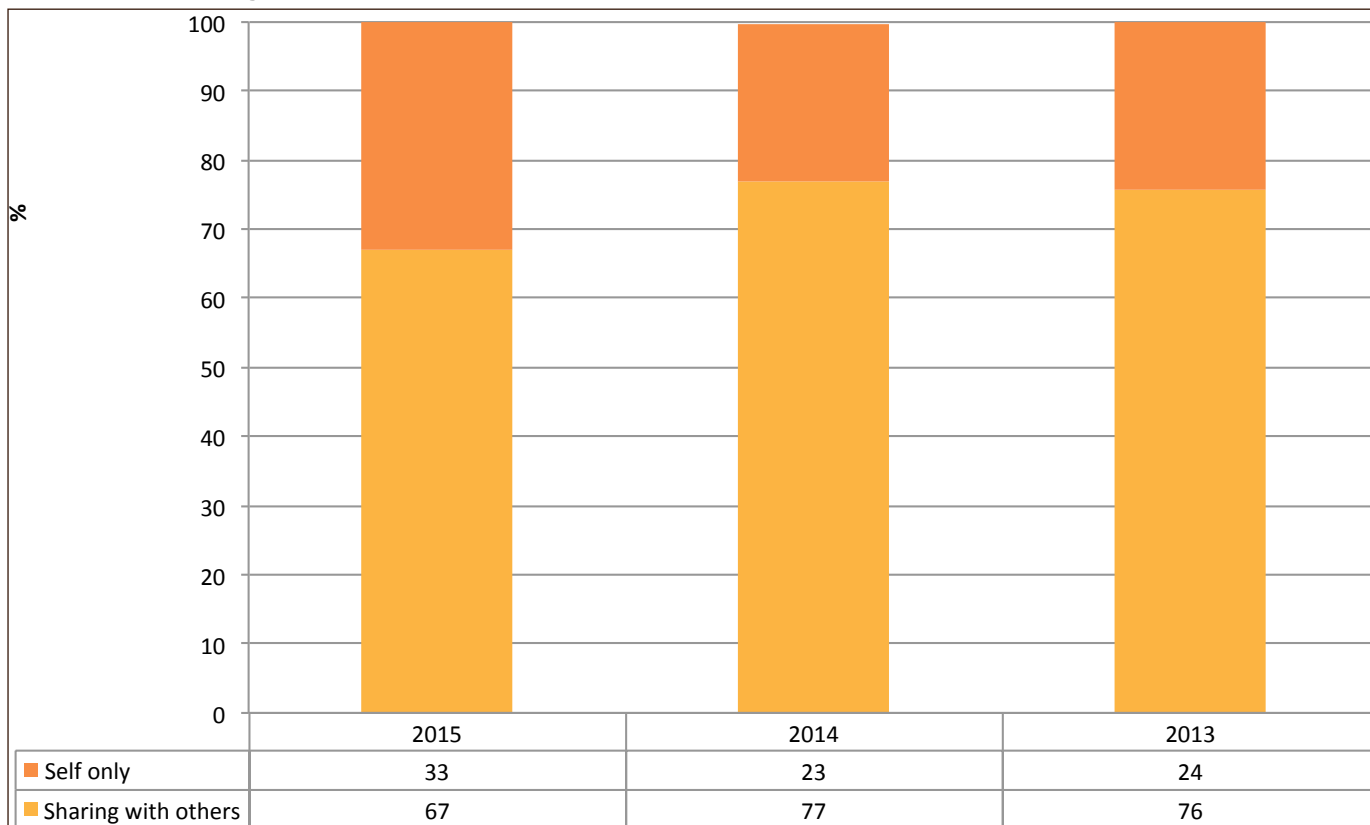
The key retail items showing higher spend are 'souvenirs' (\$33.5 million), 'clothing' (\$23.0 million), 'jewellery' (\$8.0 million), 'foodstuffs' (\$7.8 million), 'locally made handicrafts' (\$5.7 million) and 'alcohol' (\$5.6 million). 'Souvenirs' account for thirty-two percent (32%) of the total retail spend while 'clothing' accounted for twenty-two percent (22%).



5.9 Sharing costs with others

Chart 43: Q21 Sharing costs with others

Base: 4,094 (2015)



Base: All visitors

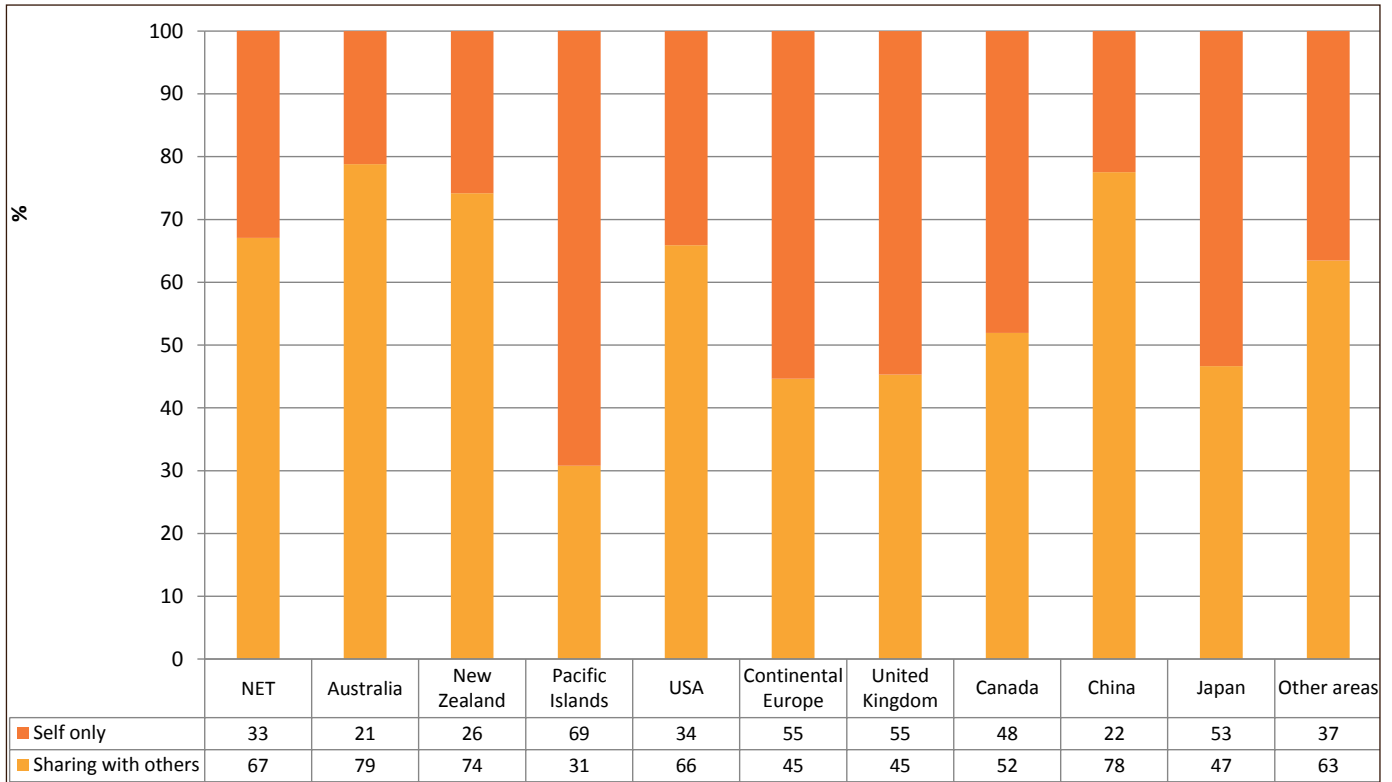
Sixty-seven percent (67%) of visitors were sharing expenses with others while thirty-three percent (33%) were paying for themselves only in 2015.

The percentage of visitors sharing costs with others slightly increased from 2013 to 2014 and decreased from 2014 to 2015 while the percentage of visitors paying for themselves only slightly decreased from 2013 to 2014 and increased from 2014 to 2015.



Chart 44: Q21 Sharing expenses with others by country and region of residence

Base: 4,080



Base: All visitors

Visitors most likely to share costs with others are from:

- Australia (79%)
- China (78%)
- New Zealand (74%)

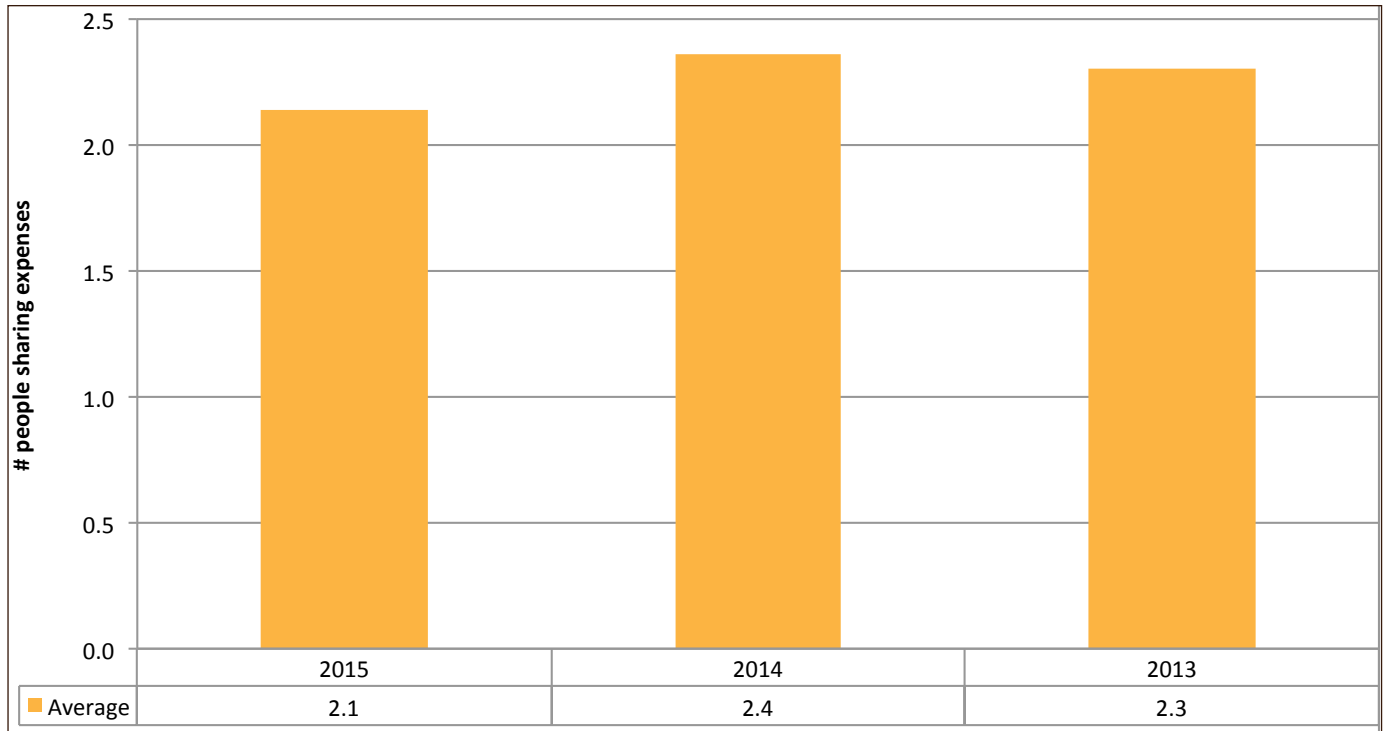
Visitors least likely to share costs with others are from:

- Pacific Islands (31%)
- Continental Europe (45%)
- United Kingdom (45%)

5.10 Number of people in group sharing expenditure

Chart 45: Q22 Number of people in group sharing expenses

Base: 3,695 (2015)



Base: All visitors

In 2015, the average number of people sharing expenses (including self only) is 2.1 people.

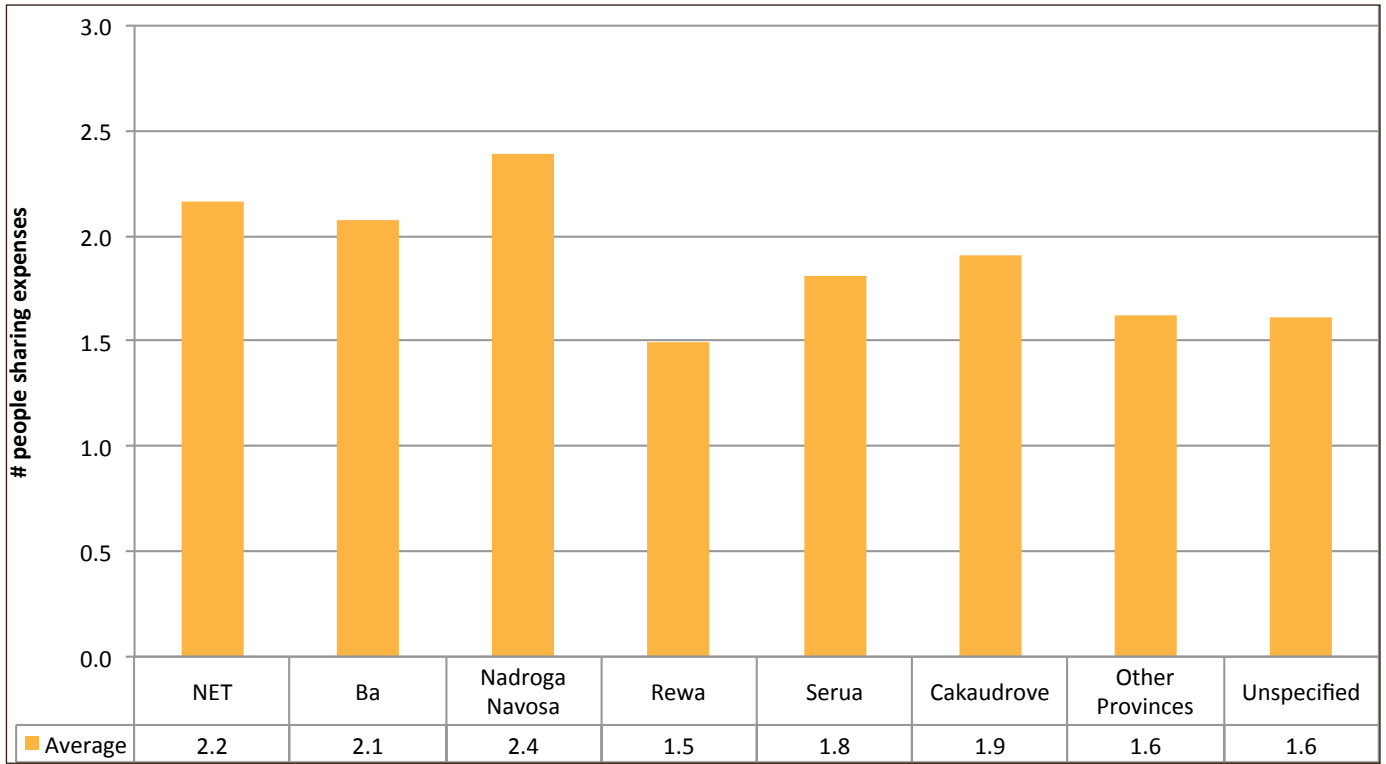
The number of people sharing costs has not significantly changed over the three years.





Chart 46: Q22 Number of people sharing expenses by Province

Base: 3,535



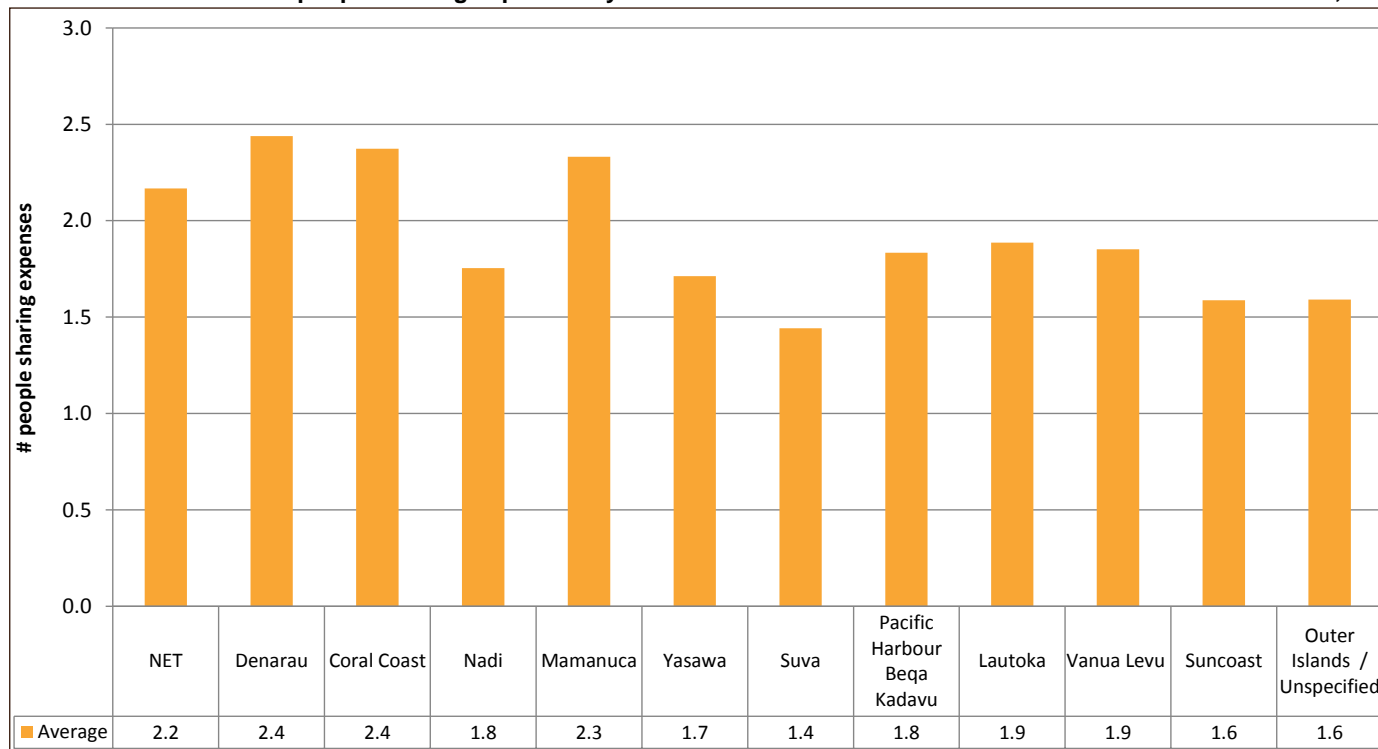
Base: All visitors

The number of people sharing expenses is higher for Nadroga/Navosa (2.4 people) and lower for all other Provinces.



Chart 47: Q22 Number of people sharing expenses by Tourism Area

Base: 3,535



Base: All visitors

The number of people sharing expenses is higher for:

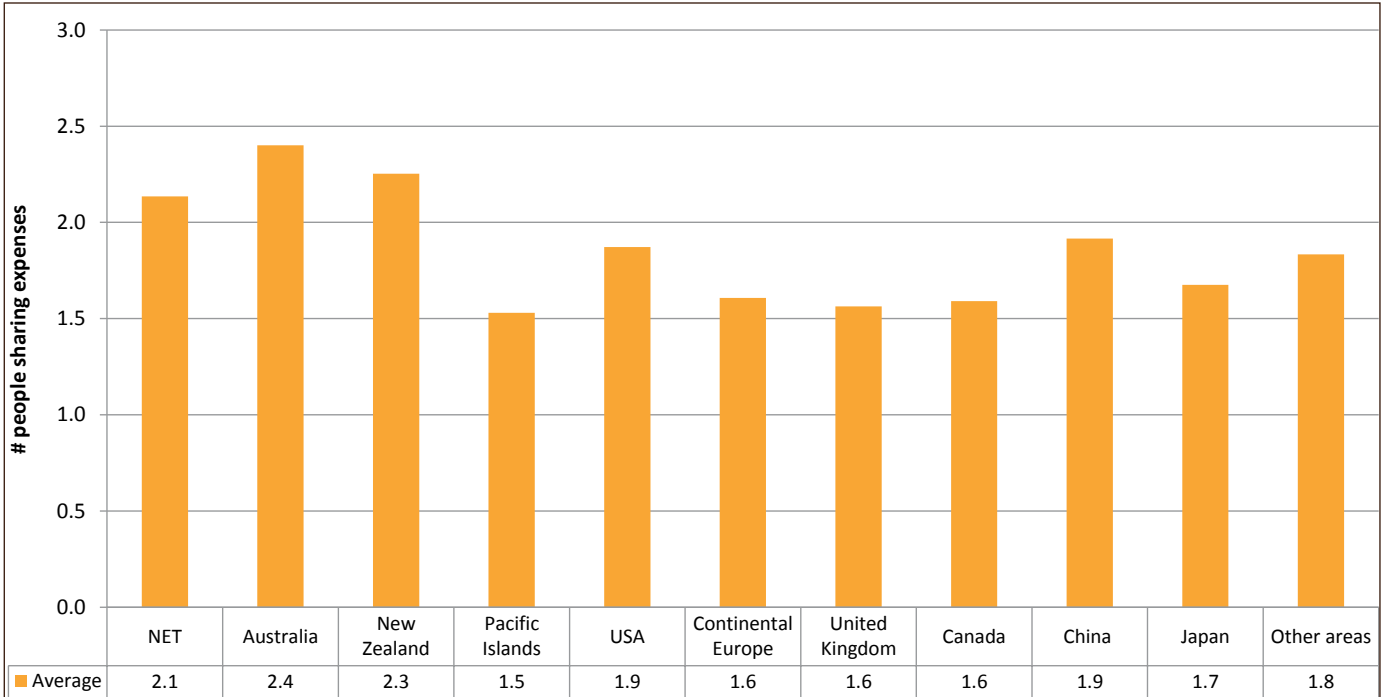
- Denarau (2.4)
- Coral Coast (2.4)
- Mamanuca (2.3)

The number of people sharing expenses is lower for all other Tourism Areas.



Chart 48: Q22 Number of people sharing expenses by country/region of residence

Base: 3,695



Base: All visitors

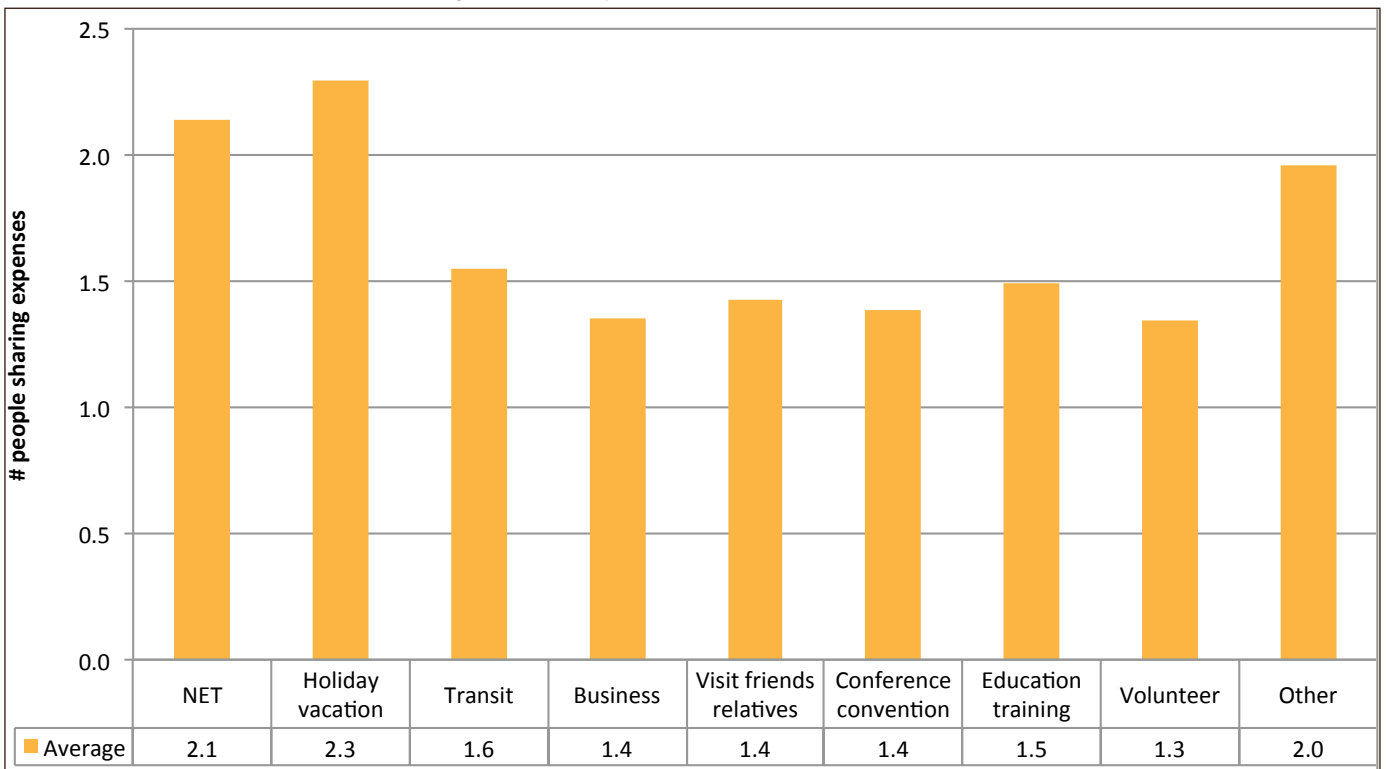
The number of people sharing expenses is higher for visitors from:

- Australia (2.4)
- New Zealand (2.3)

The number of people sharing expenses is lower for all other countries and region of residence.

Chart 49: Q22 Number of people sharing expenses by main reason for visit

Base: 3,693



Base: All visitors

Visitors on a 'holiday/vacation' are slightly above the average (2.3) in sharing expenses.

The number of people sharing expenses is below average for all other main reason of visit.

6 TRAVEL GROUPS

Included in this section are questions about group travel to Fiji including:

- Group structure
- Gender
- Age of visitors

Analysis uses both travelling groups and those sharing costs. In this section, groups are those people travelling together where costs may or may not be shared.

The most significant group in this section are those visiting Fiji as 'couple/partners/husband & wife' (39%). 'Families (including one parent with children)' is also important market as they make up seventeen percent (17%) of all group arrivals.

Visitors travelling as 'self only' make up thirty percent (30%) of arrivals and are most likely to be travelling for 'business' (80%), 'visiting friends and relatives' (72%), 'volunteer' (72%), 'transit' (70%) and 'conference/convention' (70%).

Additionally, visitors travelling with 'friends' make up seven percent (7%) of arrivals.



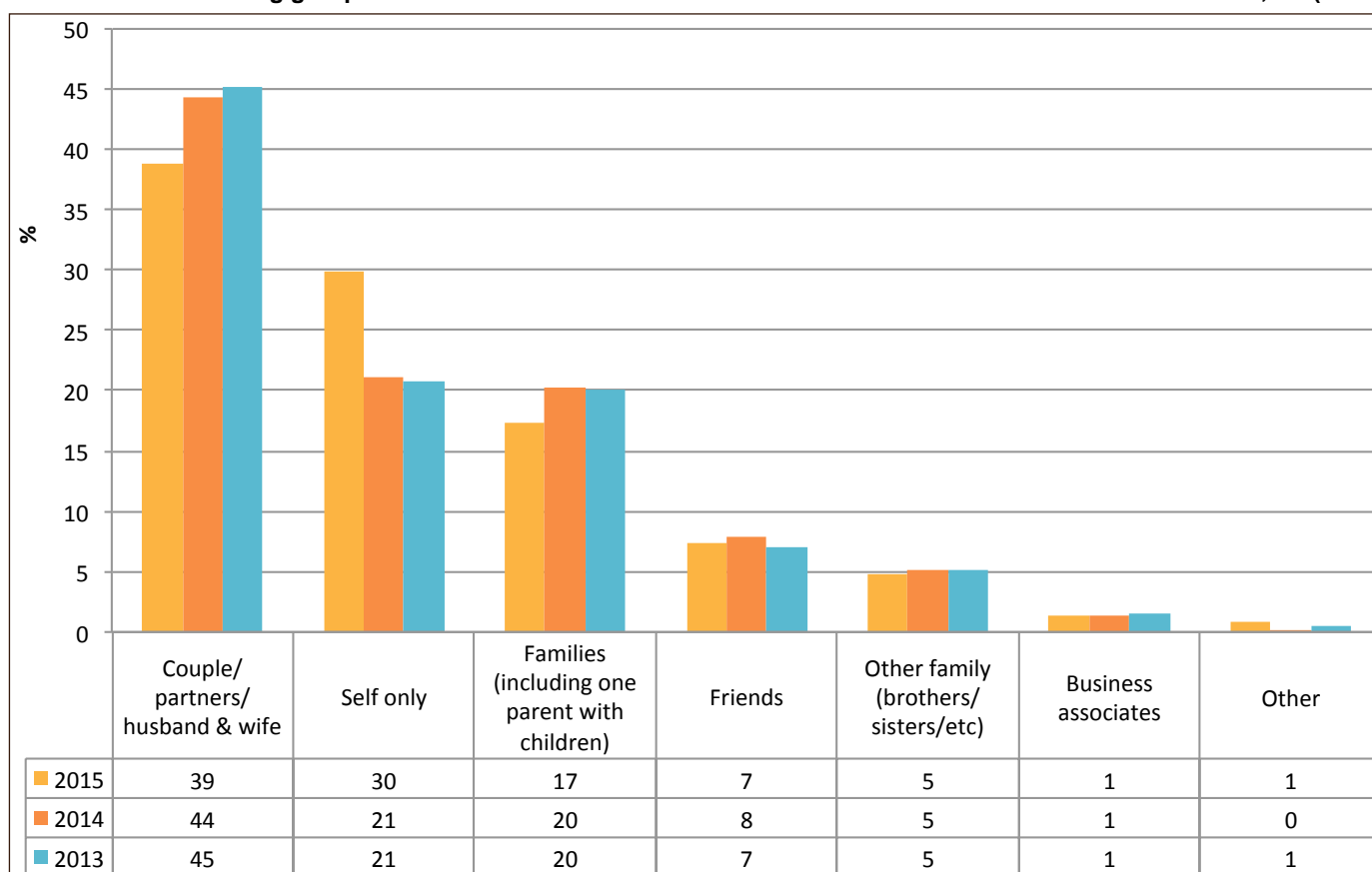


6.1 Travelling group

6.1.1 Group type

Chart 50: Q17 Travelling group

Base: 4,114 (2015)



Base: All visitors

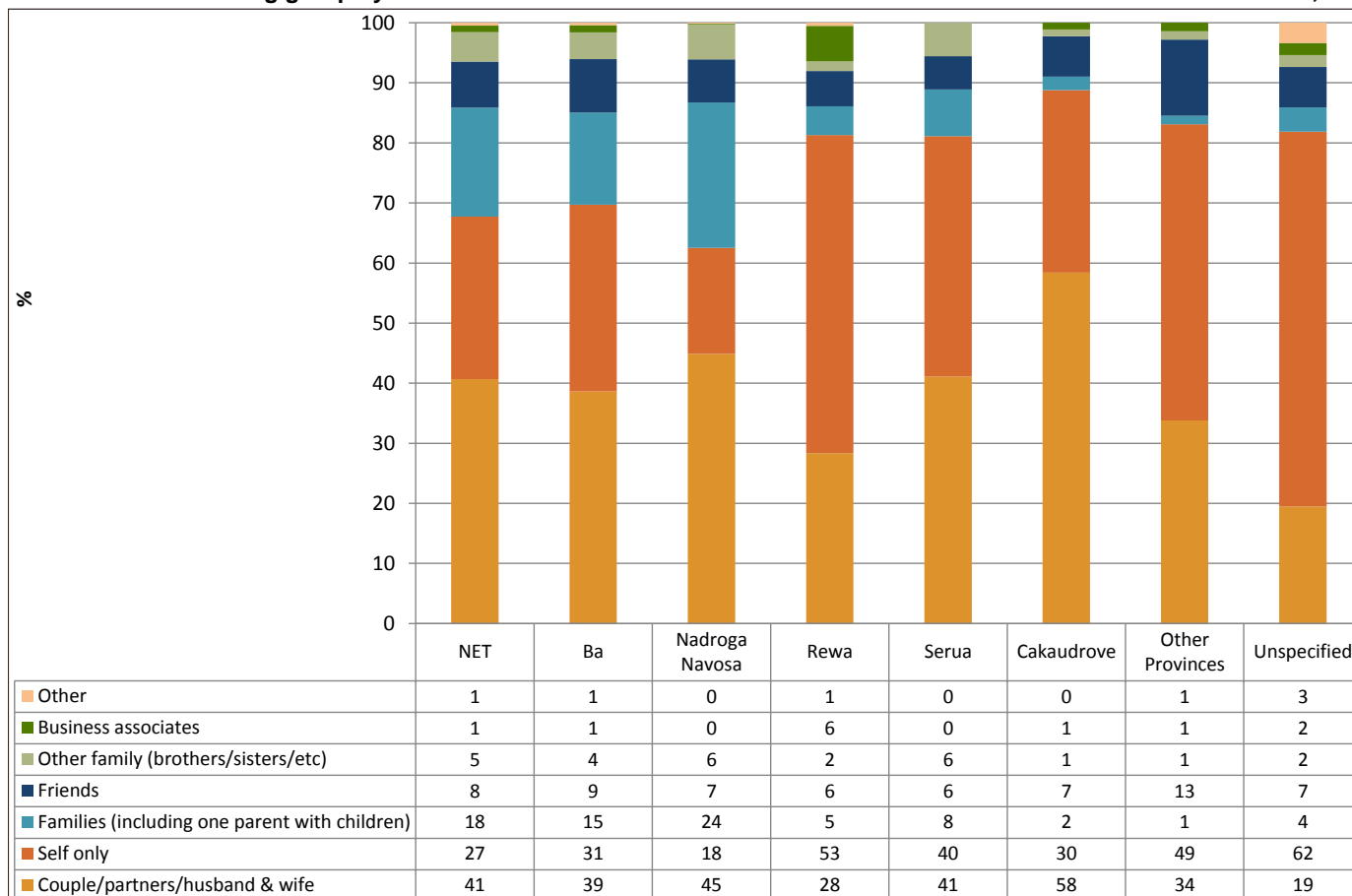
In 2015, thirty-nine percent (39%) visited as 'couple/partners/husband & wife' while a further thirty percent (30%) visited as 'self-only'. Visitors travelling as 'families (including one parent with children)' are seventeen percent (17%) of arrival groups while seven percent (7%) visited with 'friends'.

The percentage of visitors travelling as 'couple/partners/husband & wife' decreased over the three years while those travelling as 'self only' did not change from 2013 to 2014 and increased from 2014 to 2015. The percentage of visitors travelling with 'families (including one parent with children)' did not change from 2013 to 2014 and decreased from 2014 to 2015.



Chart 51: Q17 Travelling group by Province

Base: 3,362



Base: All visitors

'Couples/partners/husband and wife' are most likely to visit:

- Cakaudrove (58%)
- Nadroga/Navosa (45%)

Visitors travelling by themselves are more likely to visit:

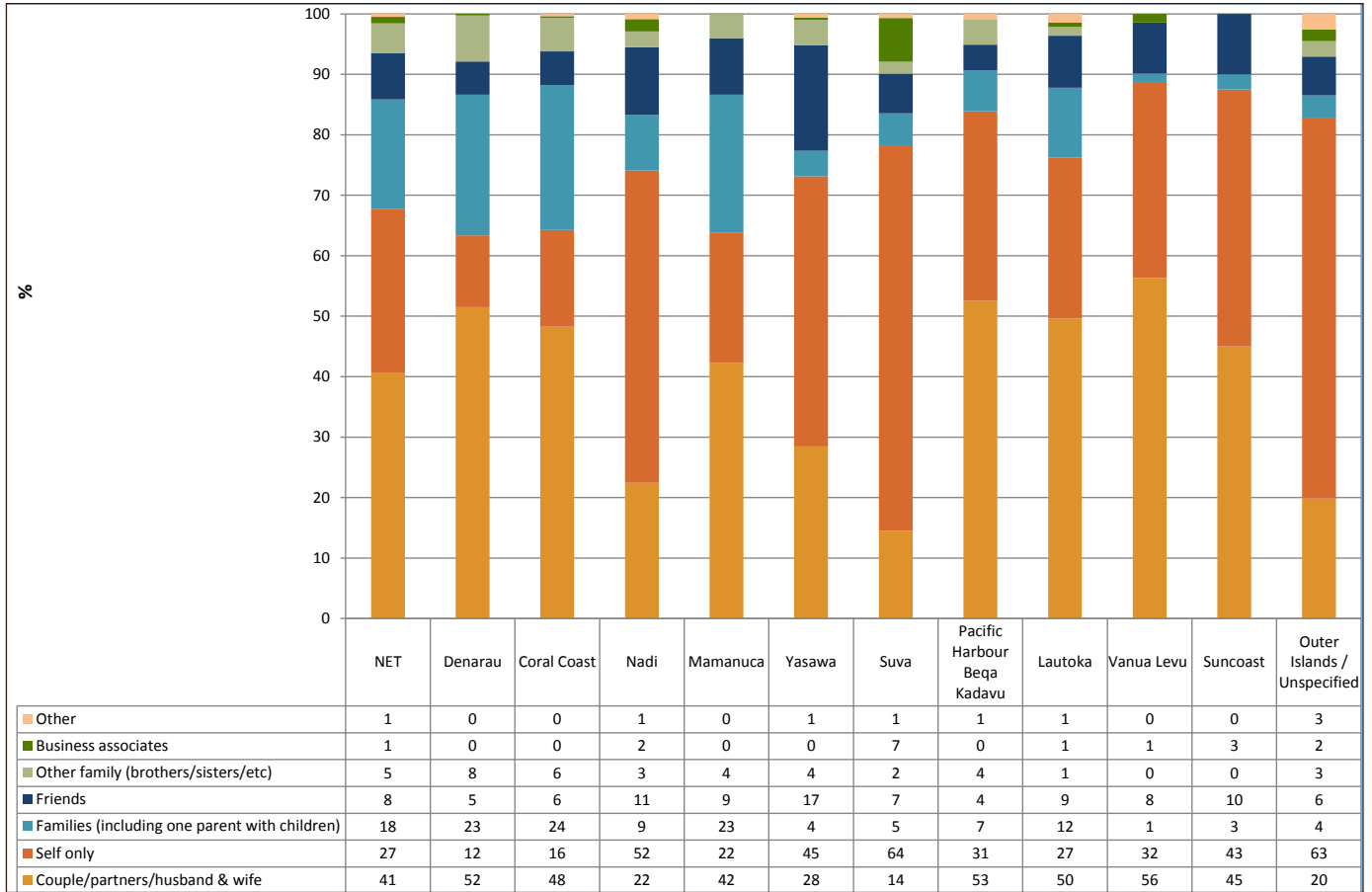
- Rewa (53%)
- Other Provinces (49%)
- Serua (40%)
- Ba (31%)

'Families (including one parent with children)' are more likely to visit Nadroga/Navosa (24%).



Chart 52: Q17 Travelling group by Tourism Area

Base: 3,362



Base: All visitors

'Couples/partners/husband and wife' are more likely to visit:

- Vanua Levu (56%)
- Pacific Harbour/Beqa/Kadavu (53%)
- Denarau (52%)
- Lautoka (50%)
- Coral Coast (48%)

Visitors travelling by themselves are more likely to visit:

- Suva (64%)
- Nadi (52%)
- Yasawa (45%)
- Suncoast (43%)

'Families (including one parent with children)' are more likely to visit:

- Coral Coast (24%)
- Denarau (23%)
- Mamanuca (23%)

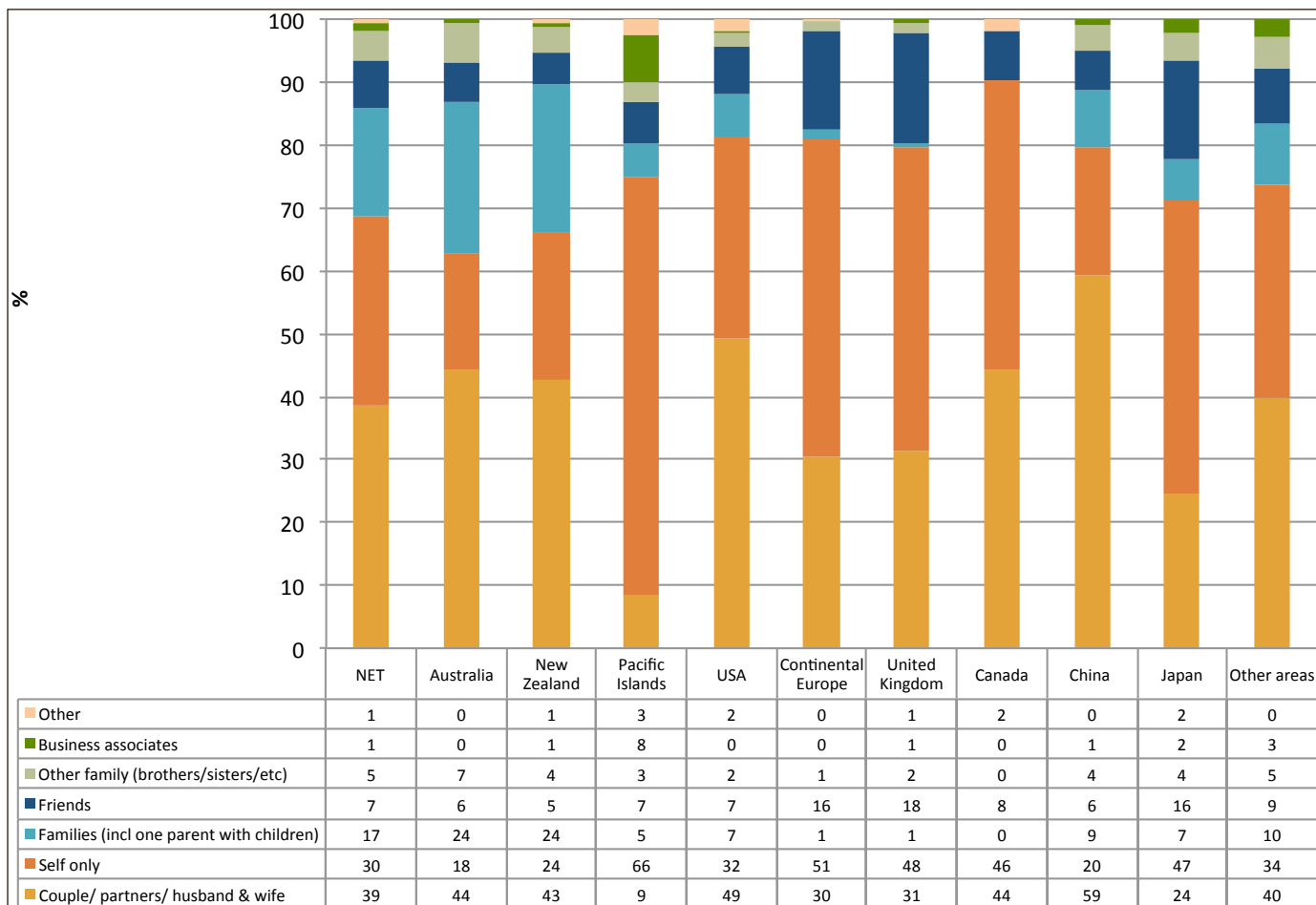
Visitors travelling with 'friends' are more likely to visit:

- Yasawa (17%)
- Nadi (11%)



Chart 53: Q17 Travelling group by country and region of residence

Base: 4,100



Base: All visitors

'Couples/partners/husband and wife' are more likely to come from:

- China (59%)
- USA (49%)
- Australia (44%)
- Canada (44%)
- New Zealand (43%)

Visitors travelling by themselves are more likely to come from:

- Pacific Islands (66%)
- Continental Europe (51%)
- United Kingdom (48%)
- Japan (47%)
- Canada (46%)

'Families (including one parent with children)' are more likely to come from:

- Australia (24%)
- New Zealand (24%)

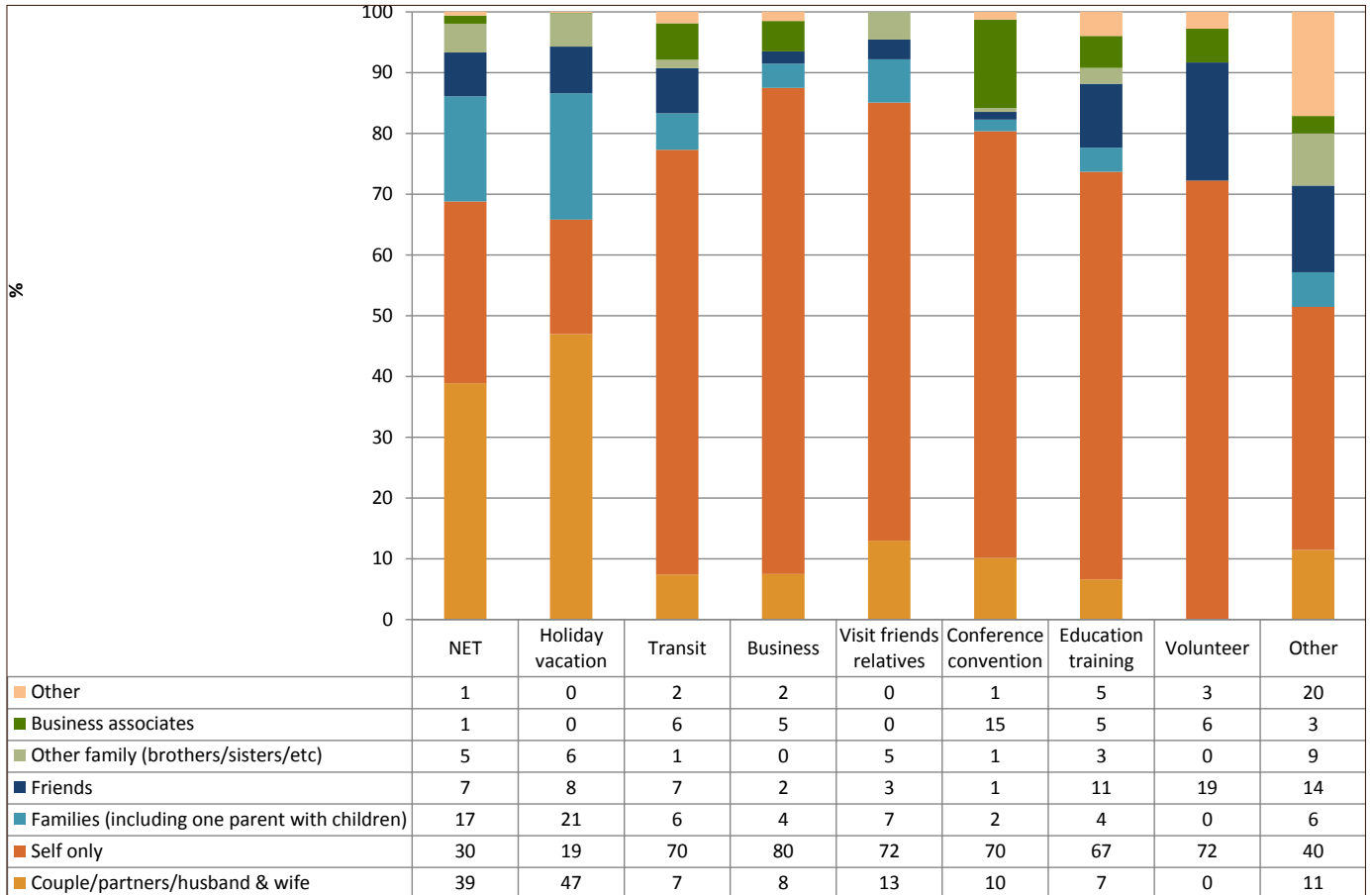
Visitors travelling with 'friends' are more likely to come from:

- United Kingdom (18%)
- Continental Europe (16%)
- Japan (16%)



Chart 54: Q17 Travelling group by main reason for visit

Base: 4,095



Base: All visitors

'Couples/partners/husband and wife' (47%) and 'families (including one parent with children)' (21%) are more likely to come for a holiday/vacation.

Visitors travelling by themselves are more likely come for:

- Business (80%)
- Visiting friends or relatives (72%)
- Volunteer (72%)
- Transit (70%)
- Conference/convention (70%)
- Education/training (67%)

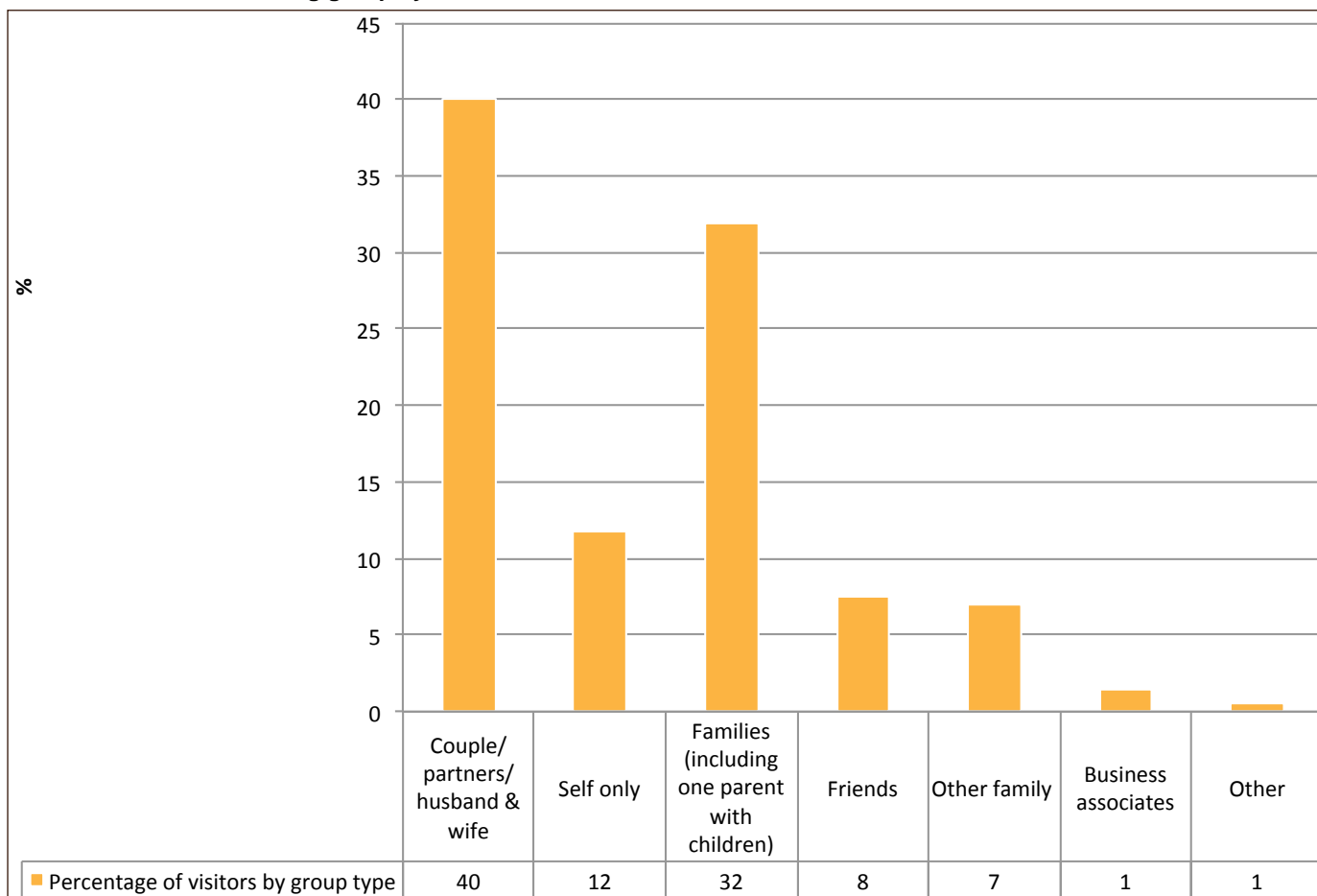
'Business associates' (15%) are more likely to come for a conference/convention.



6.1.2 Visitors by group type

Chart 55: Q17/Q22 Travelling group by number of visitors

Base: 3,702



Base: All visitors

The chart above shows the percentage of visitors in a travelling group type when combined together with the number of people sharing expenses.

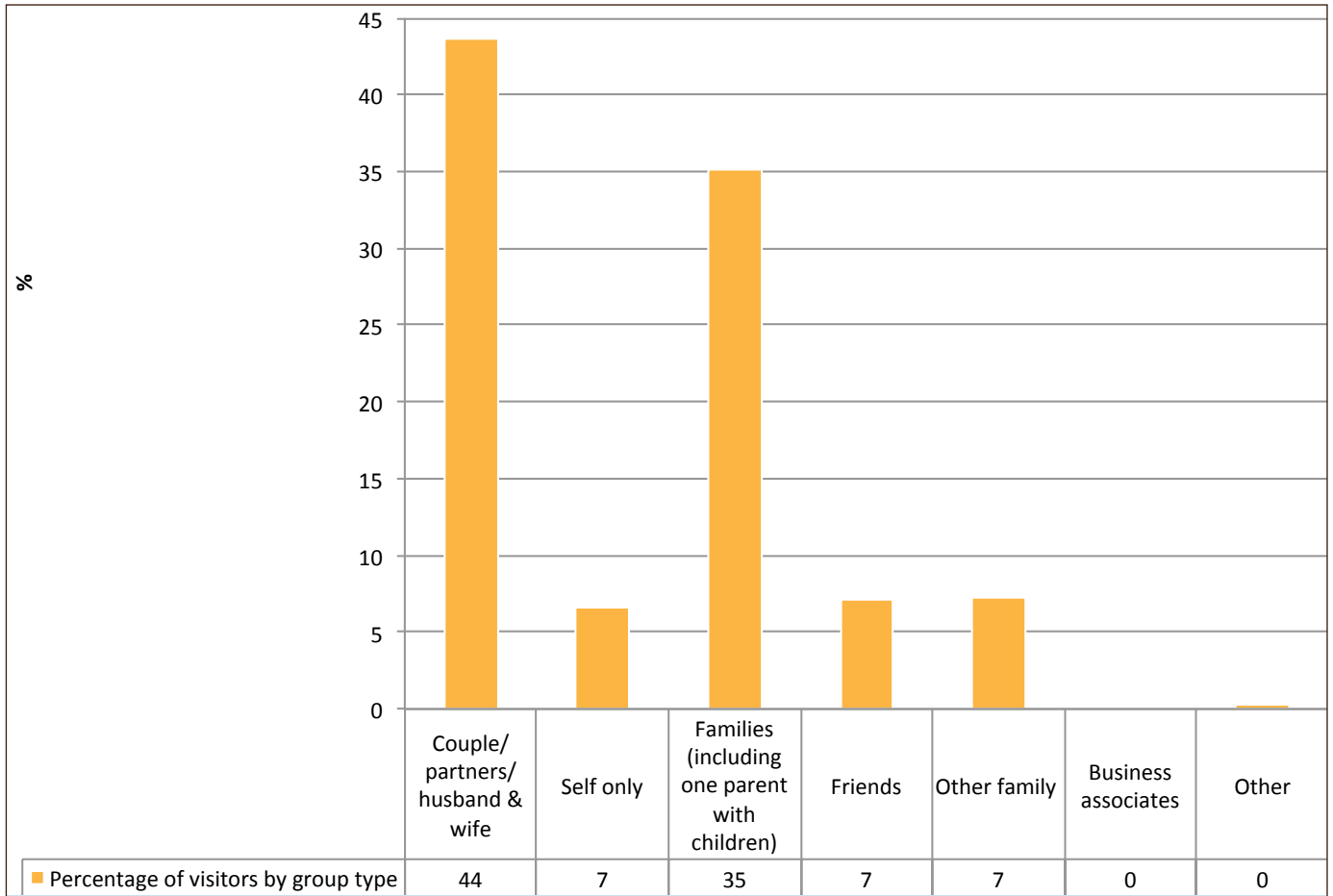
The two key groups of 'couples/partners/husband and wife' and 'families (including one parent with children)' make up seventy-two percent (72%) of all visitor arrivals.





Chart 56: Q17/Q22 Travelling group by number of visitors for holiday/vacation

Base: 2,992



Base: All visitors

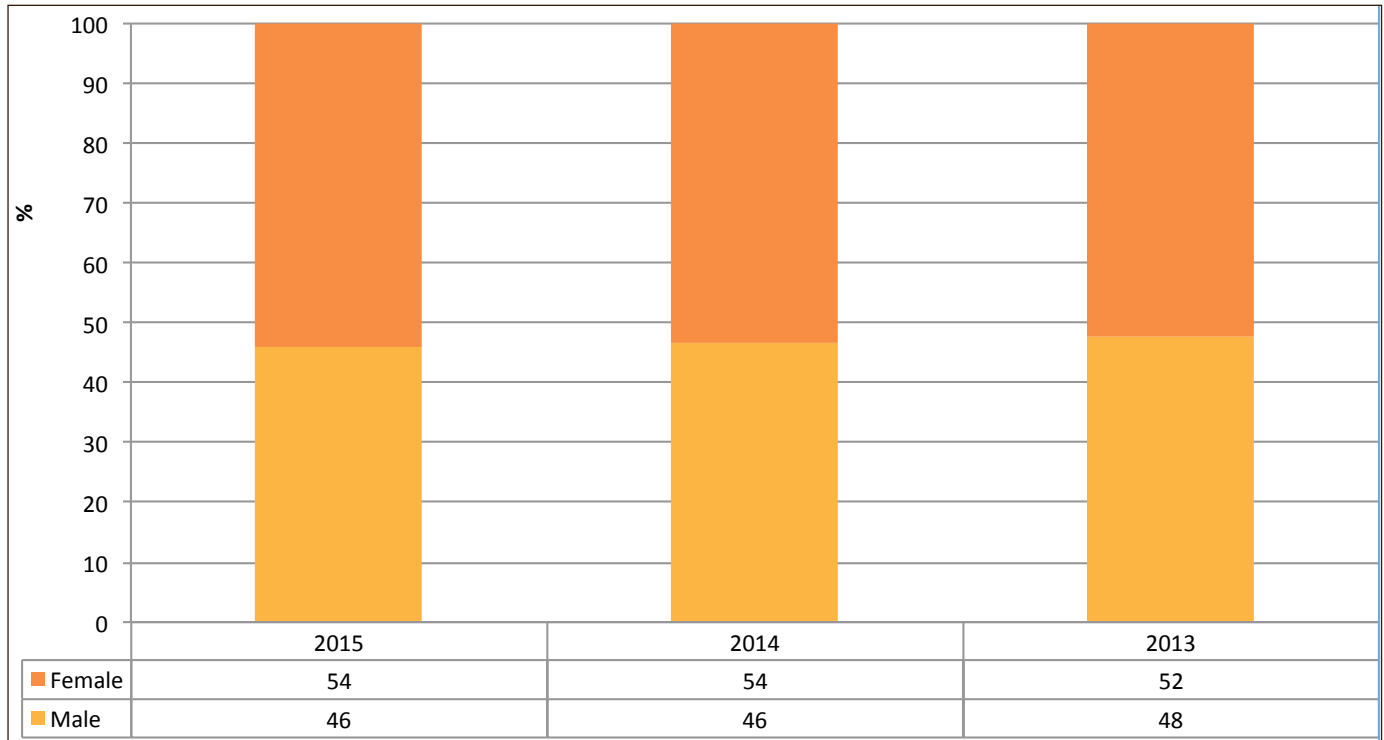
Using the same analysis as the previous chart shows that the two key groups of 'couples/partners/husband and wife' and 'families (including one parent with children)' make up seventy-nine percent (79%) of all visitors for a holiday/vacation.



6.2 Gender

Chart 57: Q91 Gender

Base: 4,092 (2015)



Base: All visitors

Forty-six percent (46%) of visitors are males and fifty-four percent (54%) are females in 2015.

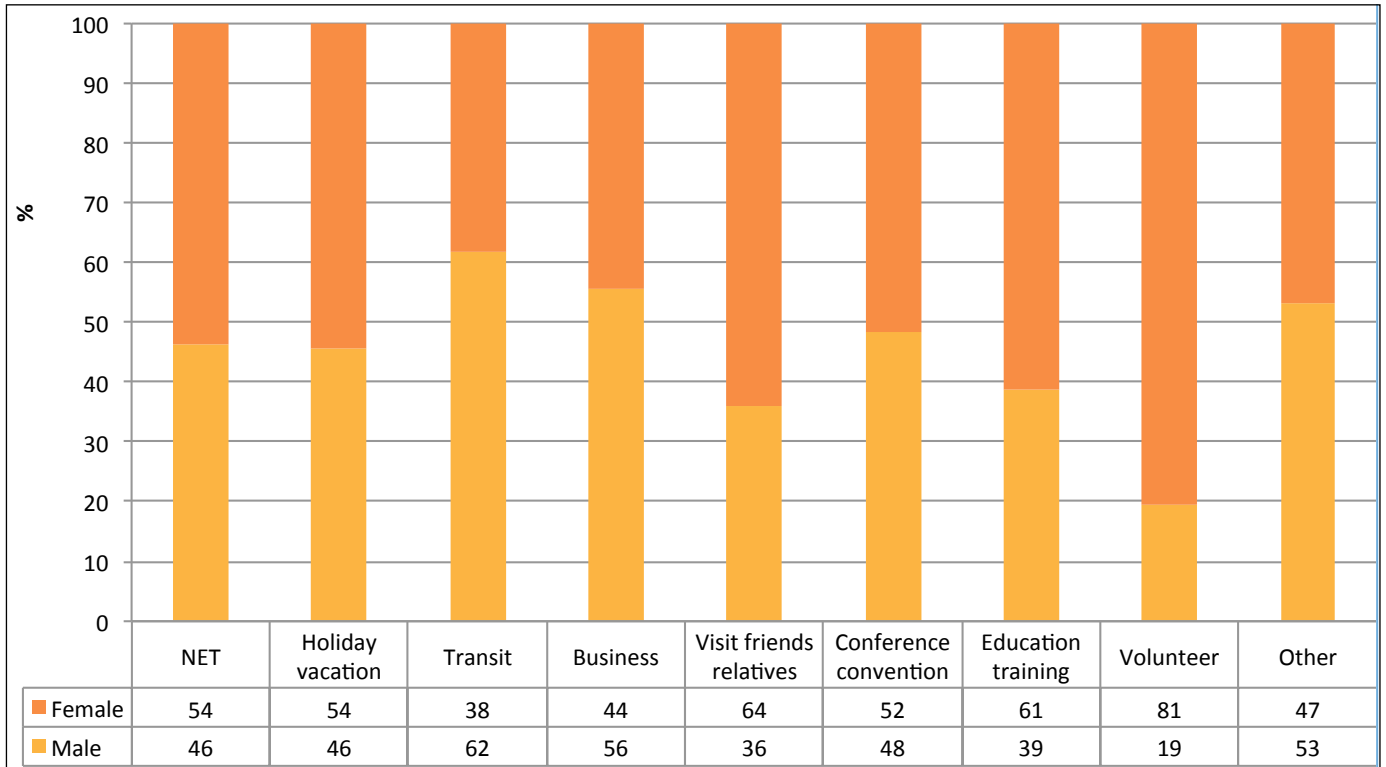
The percentage of female visitors increased from 2013 to 2014 and did not change from 2014 to 2015 while the percentage of male visitors decreased from 2013 to 2014 and did not change from 2014 to 2015.

In 2015, there is little difference by Province, Tourism Area or Country/ Region of Residence.



Chart 58: Q91 Gender by main reason for visit

Base: 4,072



Base: All visitors

Male visitors are more likely to come for:

- Business (56%)
- Conference/convention (48%)

Female visitors are more likely to come for:

- Volunteer (81%)
- Visiting friends/relatives (64%)
- Education/training (61%)





6.3 Age of visitors

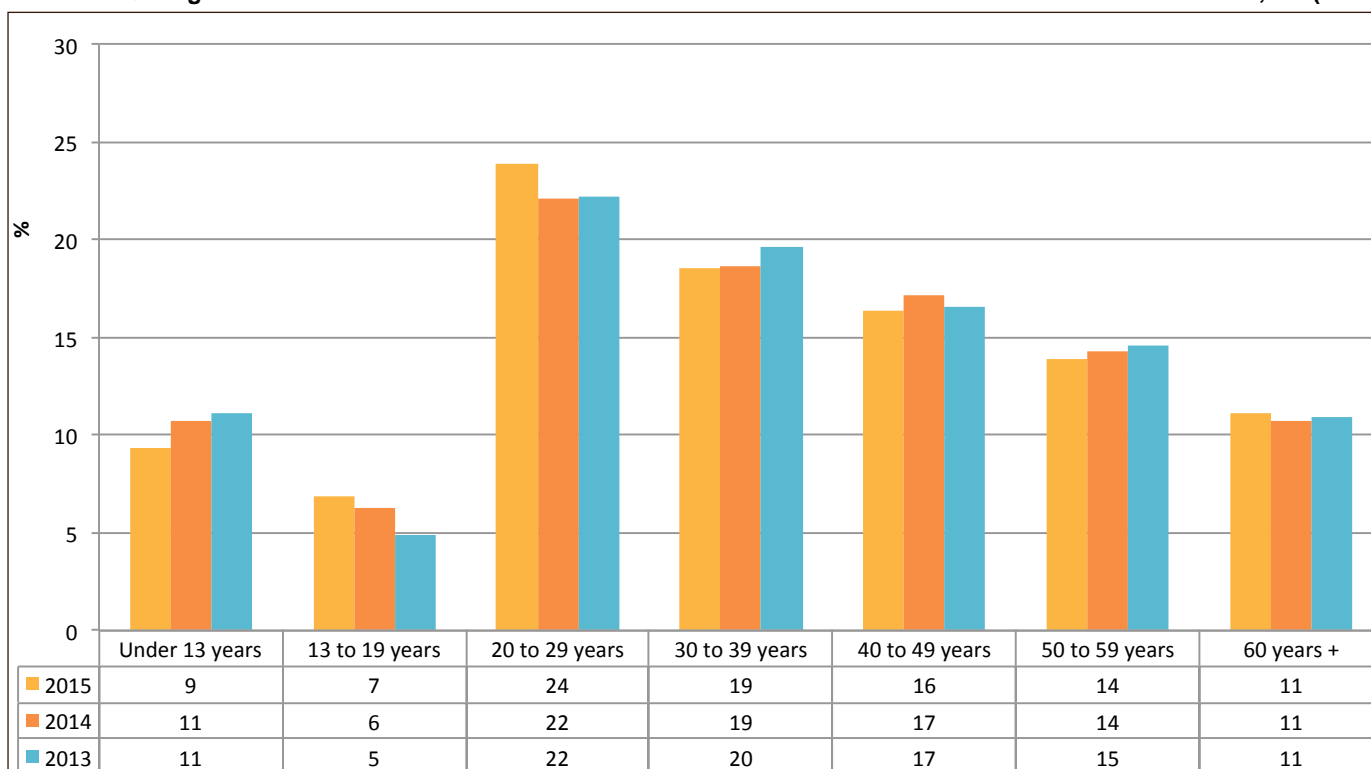
Table 20: Q90 Age of visitors and estimated visitor numbers

Base: 4,056

| Age Category | % | Estimated number of visitors |
|----------------|------------|------------------------------|
| Under 13 years | 9 | 70,154 |
| 13 to 19 years | 7 | 52,072 |
| 20 to 29 years | 24 | 180,007 |
| 30 to 39 years | 19 | 139,900 |
| 40 to 49 years | 16 | 123,313 |
| 50 to 59 years | 14 | 105,231 |
| 60 years + | 11 | 84,158 |
| Total | 100 | 754,835 |

Chart 59: Q90 Age of visitors

Base: 4,056 (2015)



Base: All visitors

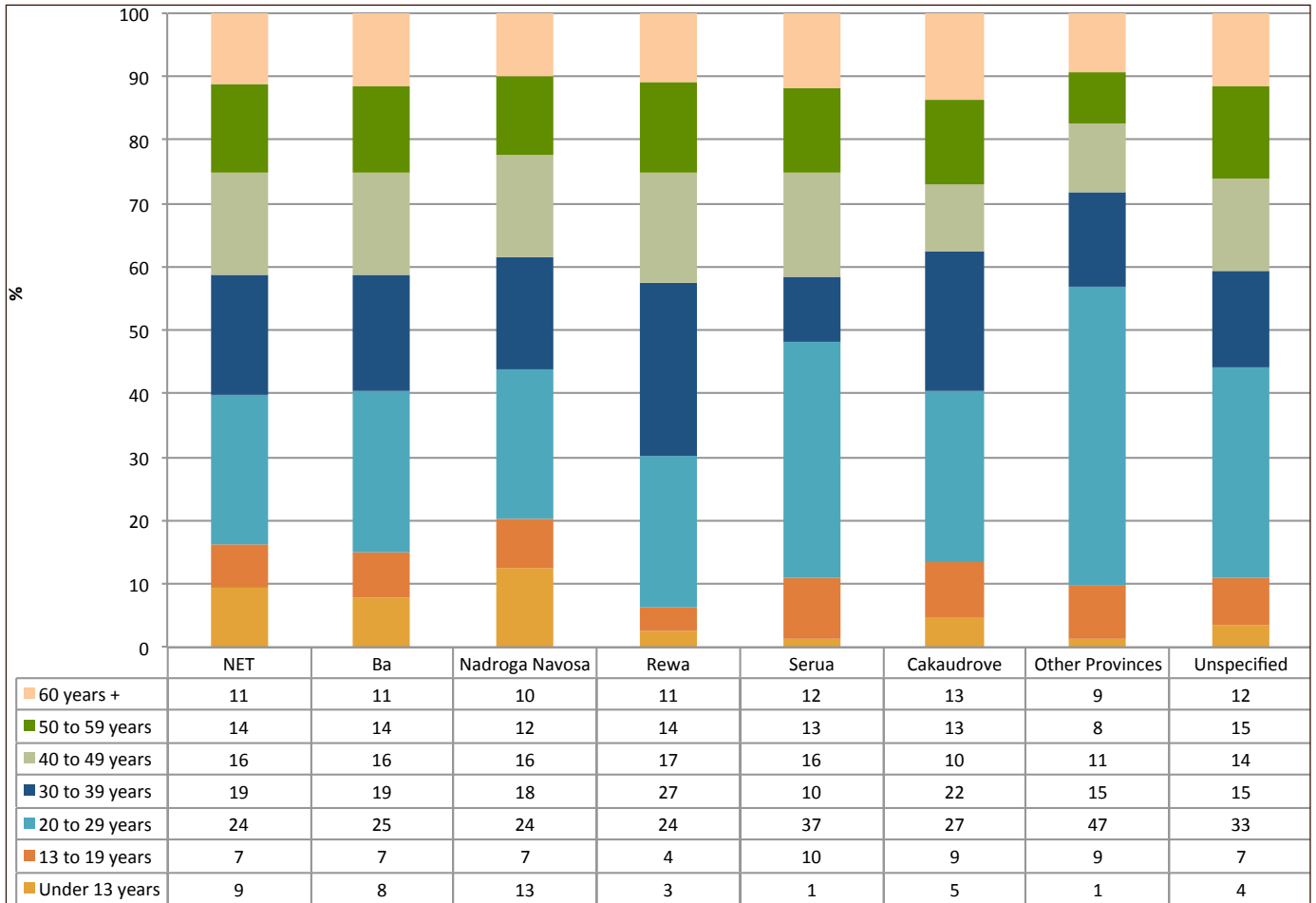
In 2015, the largest group of visitors are in the age range of 20 to 29 years (24%) while the smallest group are within the age range of 13 to 19 years (7%).

The percentage of visitors in the age range of 13 to 19 years and 20 to 29 years had increased over the three years while visitors under 13 years, 30 to 39 years, 40 to 49 years and 50 to 59 years had decreased. Also, the percentage of visitors in the age range of 60 years and over did not change from 2013 to 2015.



Chart 60: Q90 Age of visitor by Province

Base: 3,858



Base: All visitors

Visitors in the age range of 20 to 29 years are more likely to visit the Provinces of:

- Serua (37%)
- Cakaudrove (27%)
- Ba (25%)

Visitors in the age range of 30 to 39 years are more likely to visit the Provinces of:

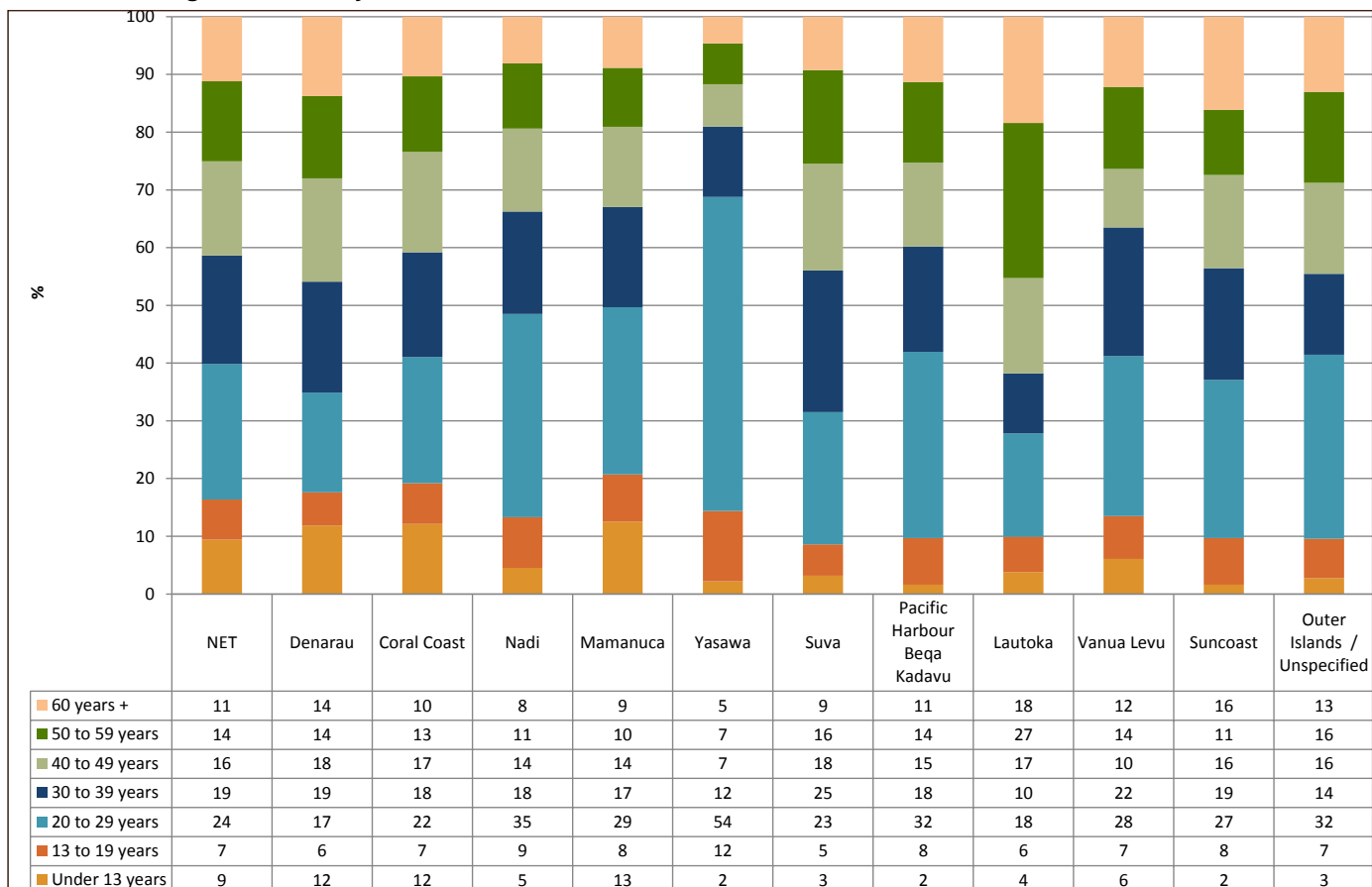
- Rewa (27%)
- Cakaudrove (22%)

Visitors in the age range of 40 to 49 years are more likely to visit the Province of Rewa (17%).



Chart 61: Q90 Age of visitors by Tourism Area

Base: 3,858



Base: All visitors

Visitors in the age range of 20 to 29 years are more likely to visit the Tourism Areas of:

- Yasawa (54%)
- Nadi (35%)
- Pacific Harbour/Beqa/Kadavu (32%)
- Mamanuca (29%)

Visitors in the age range of 30 to 39 years are more likely to visit the Tourism Areas of:

- Suva (25%)
- Vanua Levu (22%)

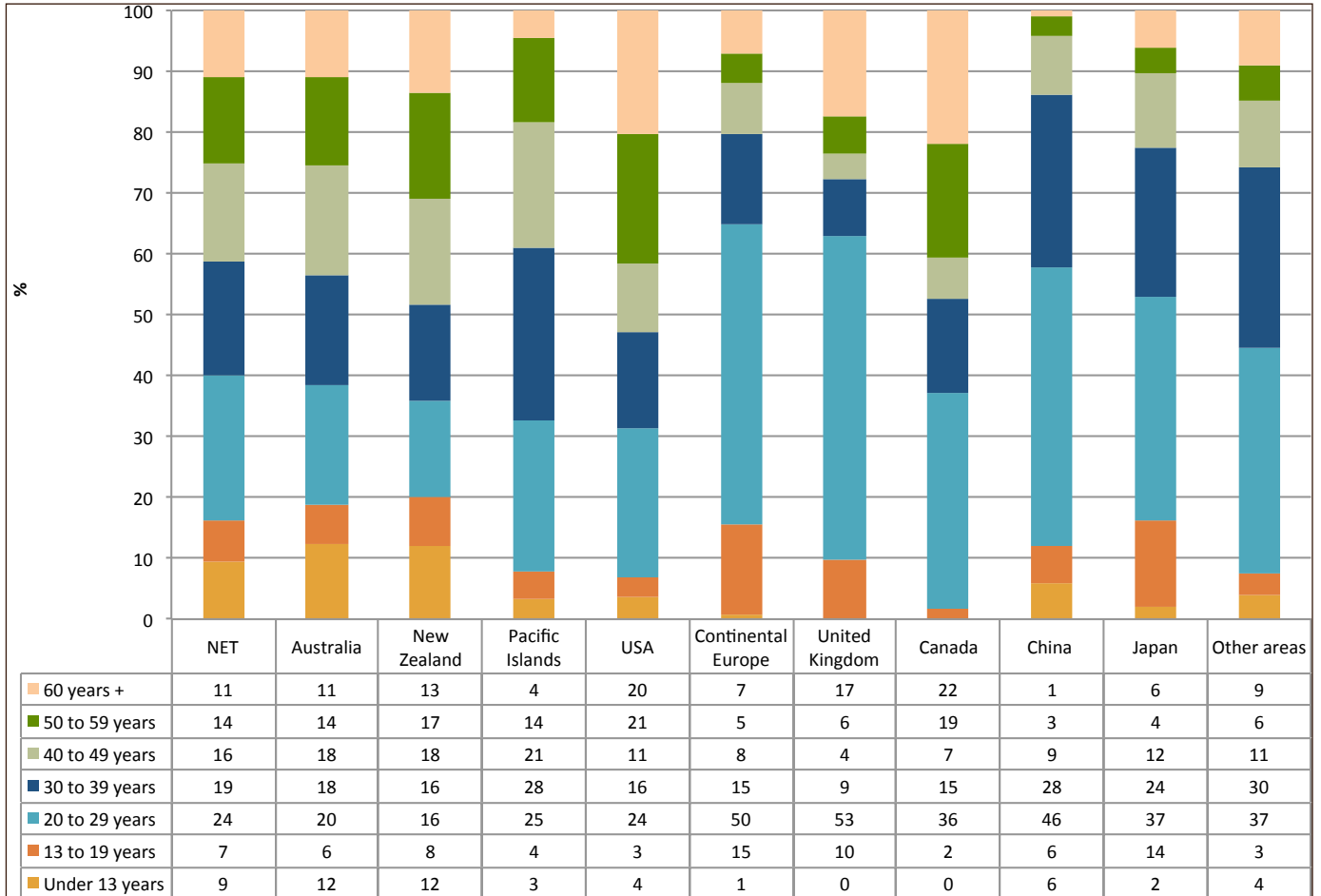
Visitors in the age range of 40 to 49 years are more likely to visit the Tourism Areas of:

- Denarau (18%)
- Suva (18%)



Chart 62: Q90 Age by country and region of residence

Base: 4,042



Base: All visitors

Visitors in the age range of 20 to 29 years are more likely to come from:

- United Kingdom (53%)
- Continental Europe (50%)
- China (46%)
- Japan (37%)
- Canada (36%)

Visitors in the age range of 30 to 39 years are more likely to come from:

- Pacific Islands (28%)
- China (28%)
- Japan (24%)

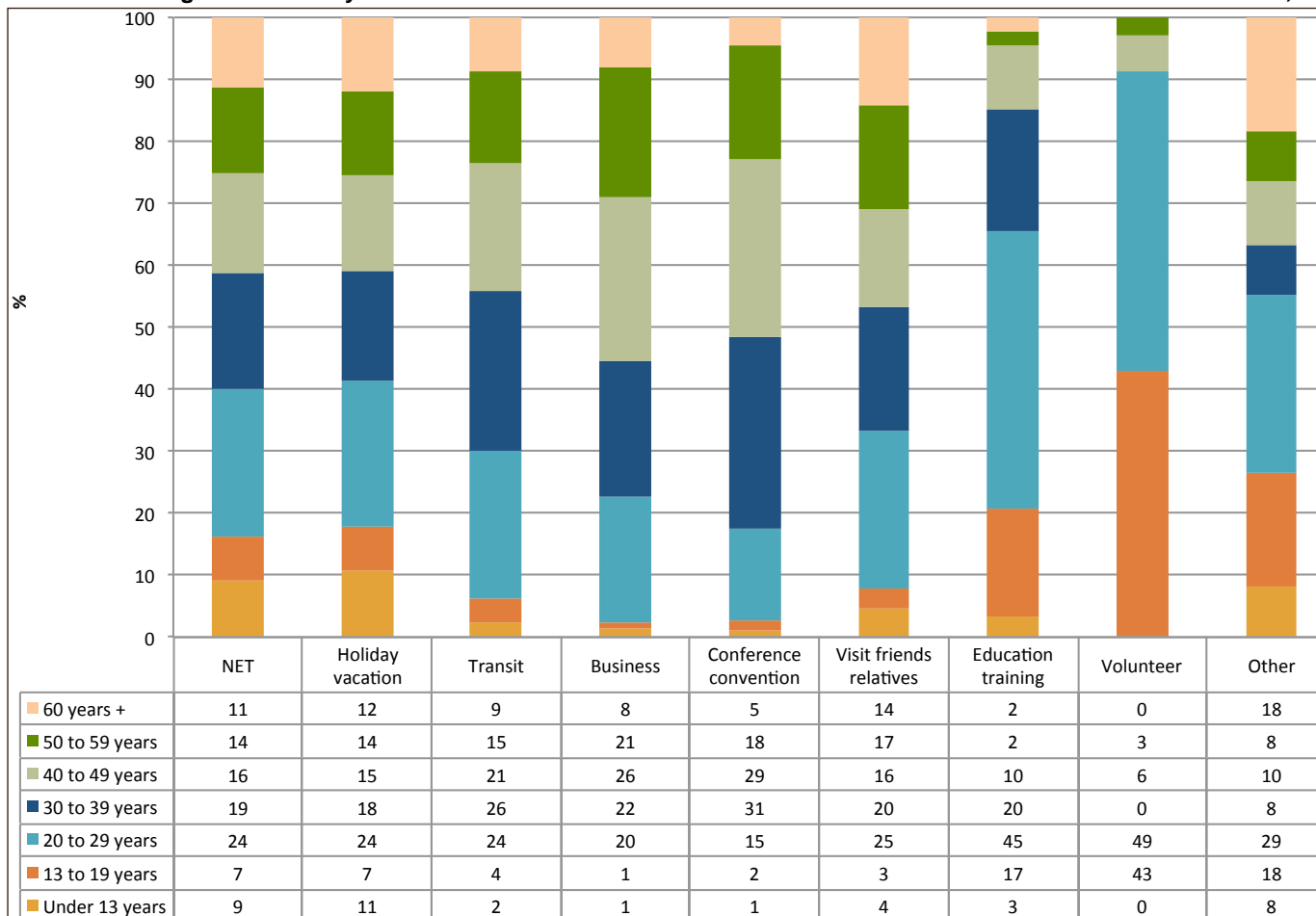
Visitors in the age range of 40 to 49 years are more likely to come from:

- Pacific Islands (21%)
- Australia (18%)
- New Zealand (18%)



Chart 63: Q90 Age of visitors by main reason for visit

Base: 4,040



Base: All visitors

Visitors in the age range of 20 to 29 years are more likely to come for:

- Volunteer (49%)
- Education/training (45%)

Visitors in the age range of 30 to 39 years are more likely to come for:

- Conference/convention (31%)
- Transit (26%)
- Business (22%)

Visitors in the age range of 40 to 49 years are more likely to come for:

- Conference/convention (29%)
- Business (26%)



7 ACCOMMODATION

This section details the method in which accommodation was booked and how content visitors were with their experience. This includes:

- Method of booking accommodation
- Satisfaction with accommodation

Half (51%) of visitors to Fiji booked their accommodation through travel agents whereas thirty-seven percent (37%) booked directly with hotels including by phone, email or website.

Satisfaction for hotel accommodation as an Index has 'high' ratings for:

- Courtesy of staff (75)
- Cleanliness of rooms (70)
- Accommodation facilities in general (67)

The two areas that have below average 'high' ratings are:

- Value for money (58)
- Quality of food (52)

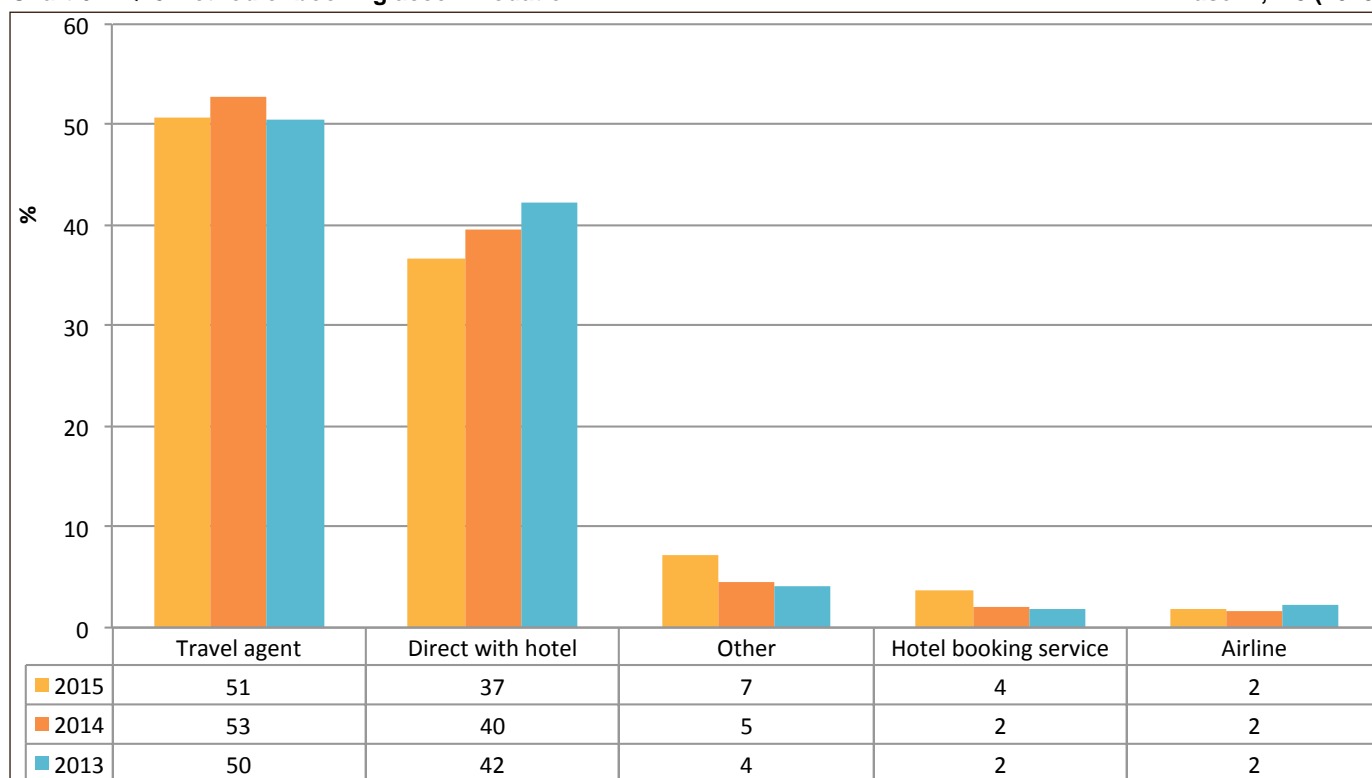
Both of these ratings need to be seen in the context that all hotel ratings are 'high' and these are the only two with any level of dissatisfaction.



7.1 Method of booking accommodation

Chart 64: Q18 Method of booking accommodation

Base: 4,123 (2015)



Base: All visitors in paid accommodation

In 2015, fifty-one percent (51%) of all accommodation bookings was through a travel agent while thirty-seven percent (37%) booked directly with hotels. A few visitors had booked their accommodation through a hotel booking service (4%) and airline (2%).

The percentage of visitors booking accommodation with travel agents increased from 2013 to 2014 and decreased from 2014 to 2015 while visitors booking directly with hotels noted a decrease over the three years.



Chart 65: Q18 Method of booking accommodation by country/region of residence

Base: 4,050



Base: All visitors in paid accommodation

Visitors from China (63%), Japan (62%), New Zealand (61%) and Australia (57%) are more likely to use a travel agent for bookings.

Visitors from Pacific Islands (50%), Continental Europe (44%) and Canada (44%) are more likely to have booked directly with hotels.

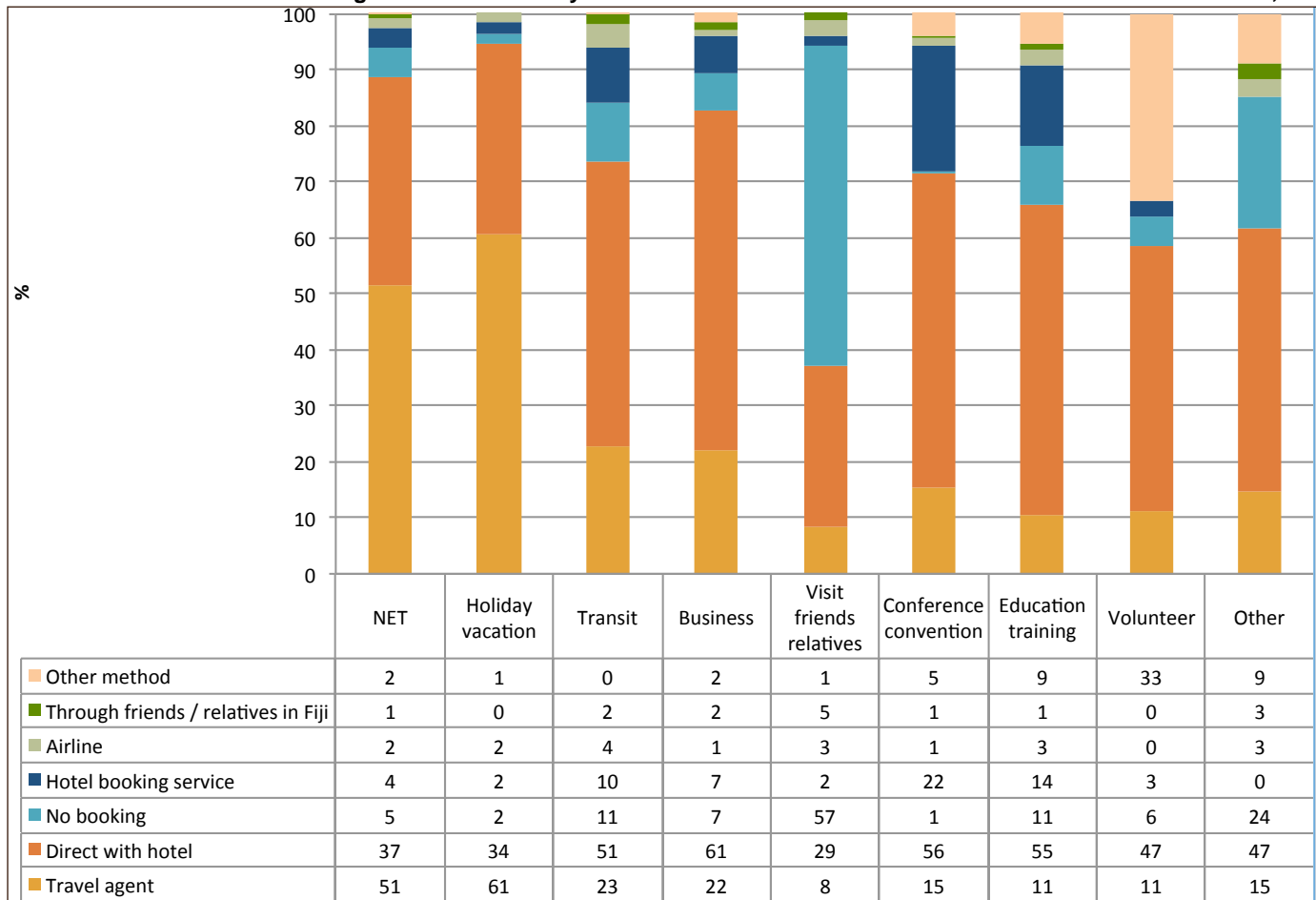
Additionally, visitors from the Pacific Islands are also more likely to have no bookings (15%) or use a hotel booking service (12%).





Chart 66: Q18 Method of booking accommodation by main reason for visit

Base: 4,051



Base: All visitors in paid accommodation

Visitors travelling for a 'holiday/vacation' are more likely to book their accommodation through a travel agent (61%).

Booking directly with hotels is more likely for visitors travelling for:

- Business (61%)
- Conference/convention (56%)
- Education/training (55%)
- Transit (51%)

Differences by Province

Booking accommodation using a travel agent is higher for Nadroga/Navosa (65%) whereas booking directly with hotels is higher for:

- Rewa (57%)
- Serua (56%)
- Ba (40%)

Differences by Tourism Area

Booking accommodation through travel agents is higher for:

- Mamanuca (67%)
- Coral Coast (64%)
- Denarau (60%)

Booking directly with hotels is higher for:

- Suva (58%)
- Pacific Harbour/Beqa/Kadavu (50%)
- Nadi (48%)



7.2 Satisfaction with accommodation

Research participants were asked to rate their accommodation experience on six areas in a scale of 0 to 10 (where 0 = extremely poor and 10 = extremely good).

This has been treated in two ways;

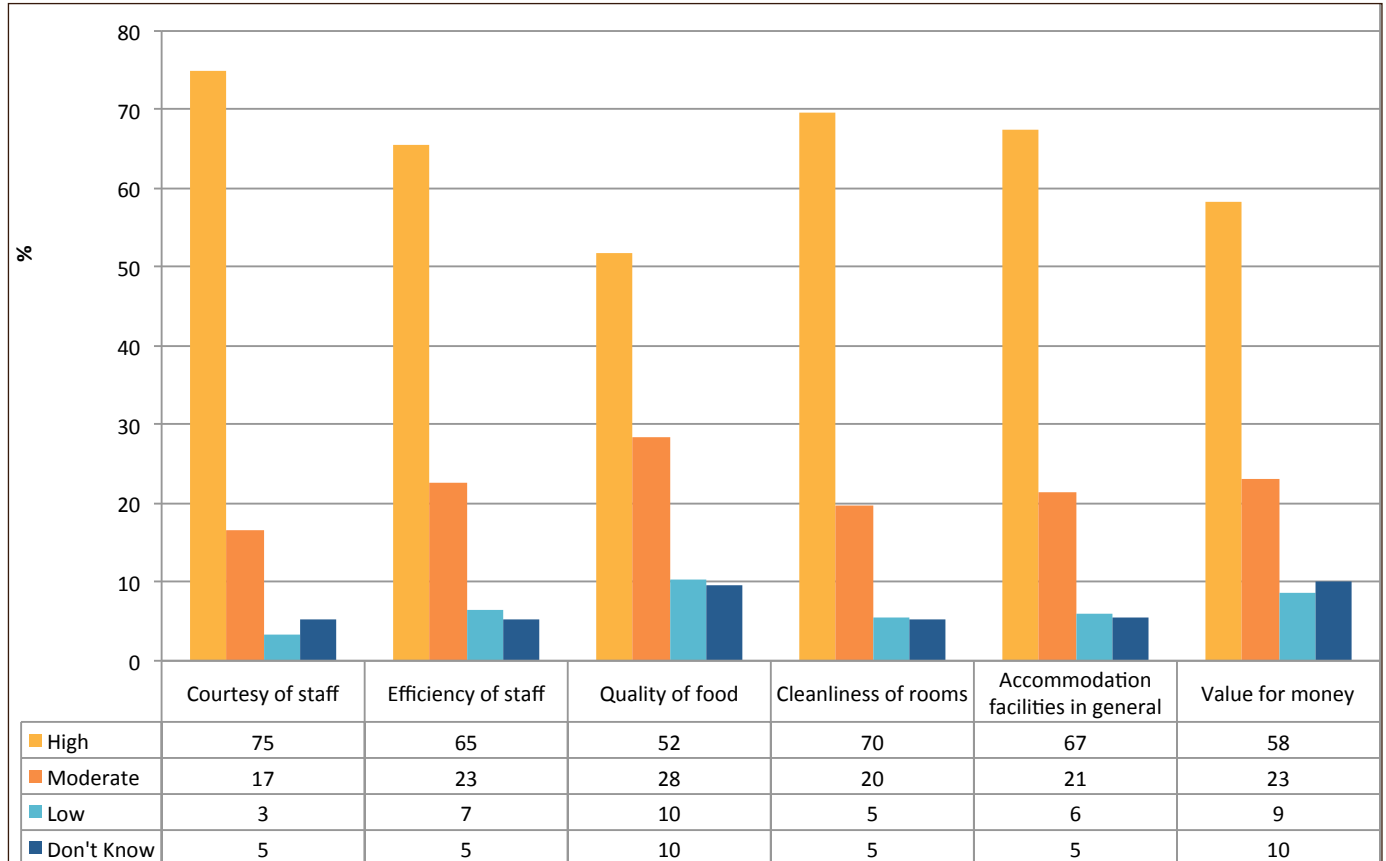
i) Ratings were grouped as:

- 0 to 6 = low
- 7 or 8 = moderate
- 9 or 10 = high

ii) Ratings have also been converted to an index (score out of 100) to allow for better comparison between groups.

Chart 67: Q39 Satisfaction with accommodation

Base: 4,015



Base: All visitors in paid accommodation

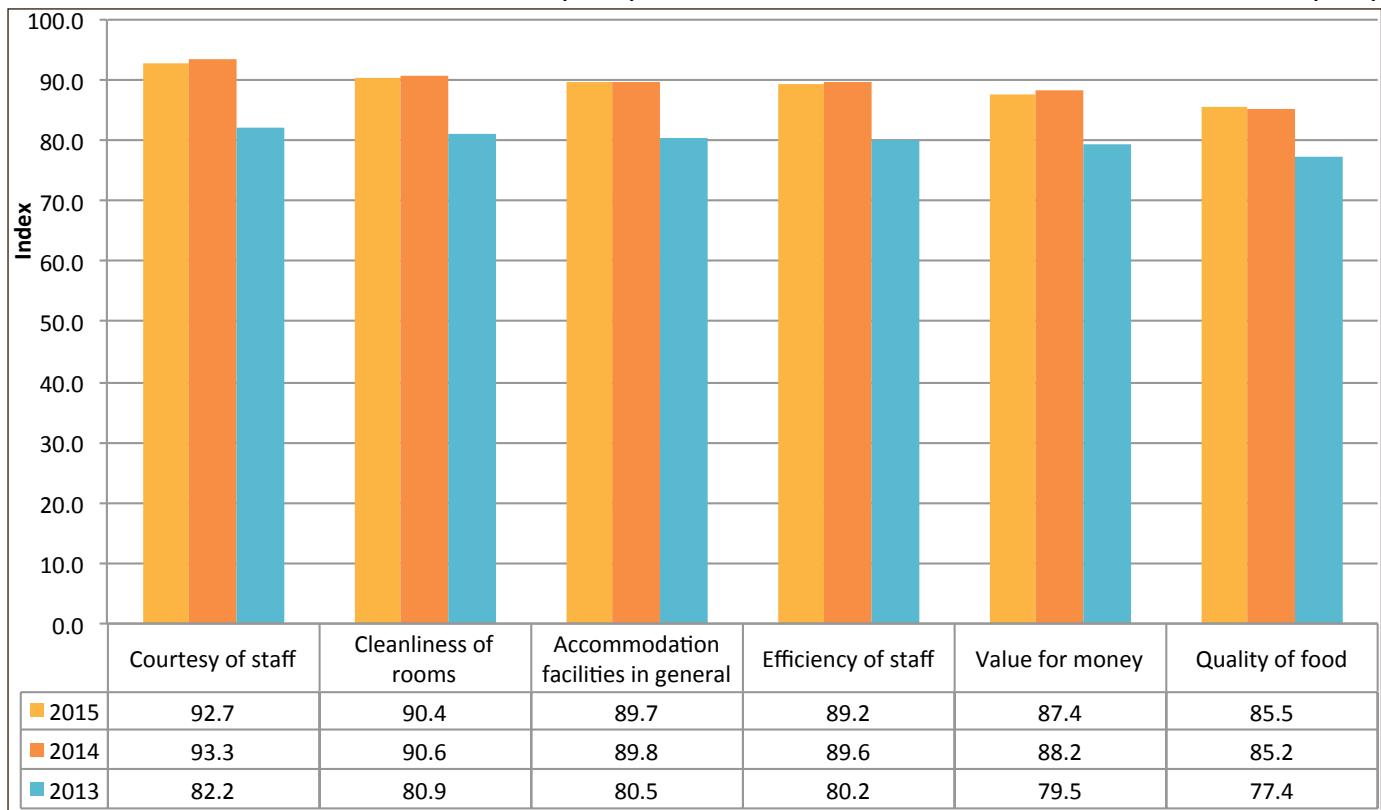
'Courtesy of staff' (75%) is the most favourable contributing factor towards satisfaction with accommodation. This is followed by 'cleanliness of rooms' (70%) and 'accommodation facilities in general' (67%).

'Quality of food' has the lowest 'high' rating (52%) compared to the other accommodation aspects and the highest 'low' rating (10%).



Chart 68: Q39 Satisfaction with accommodation (Index)

Base: 3,646 (2015)



Base: All visitors in paid accommodation

Converting the ratings to an Index shows that there is overall little difference in satisfaction. All of these scores are relatively high and may not necessarily be considered a poor rating.

In 2015, ratings that were above average are:

- Courtesy of staff (92.7)
- Cleanliness of rooms (90.4)
- Accommodation facilities in general (89.7)

'Efficiency of staff' is on average (89.2).

Ratings below the average are:

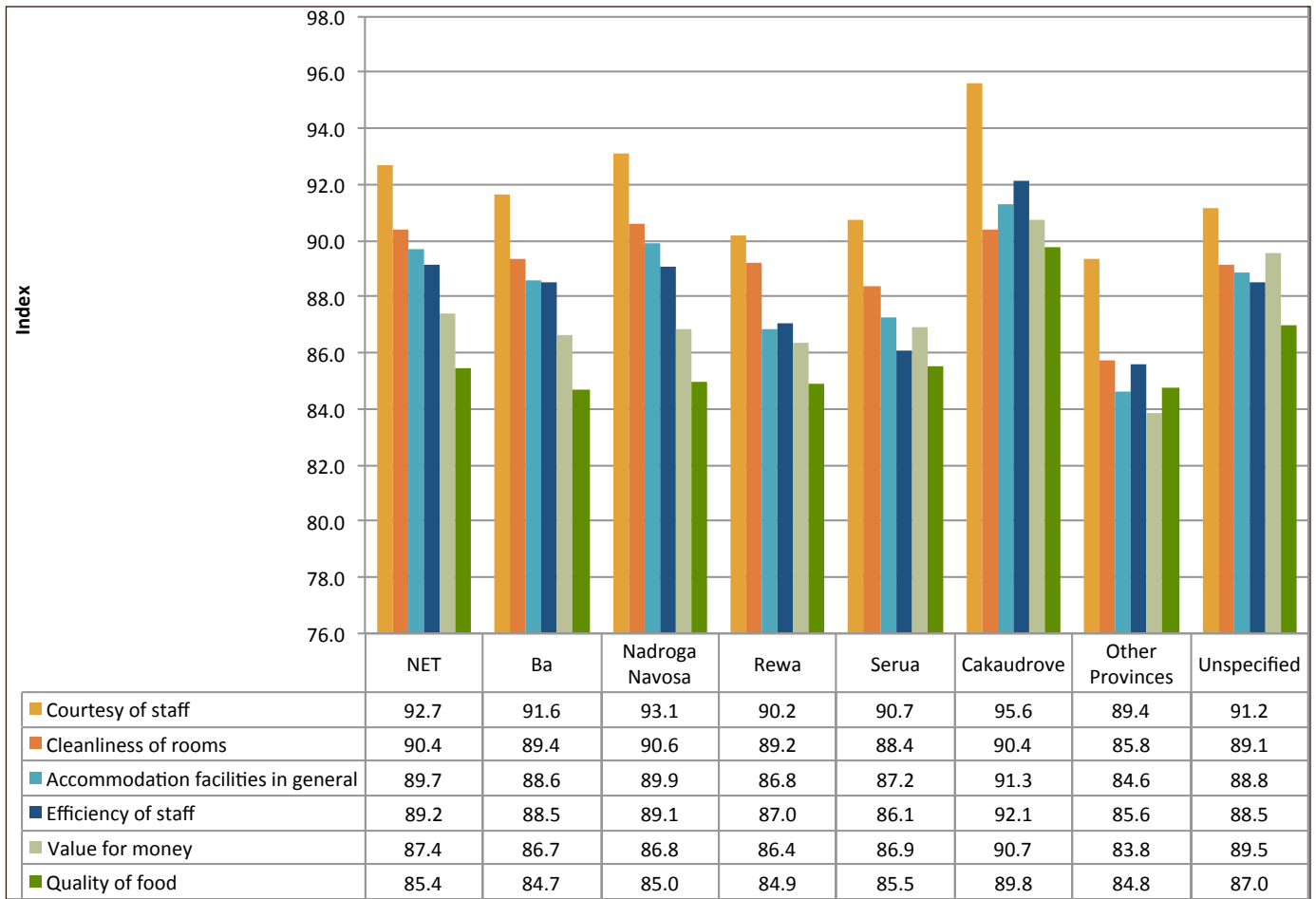
- Value for money (87.4)
- Quality of food (85.5)

The index ratings for 'courtesy of staff', 'cleanliness of rooms', 'accommodation facilities in general', 'efficiency of staff' and 'value for money' noted an increase from 2013 to 2014 and a slight decrease from 2014 to 2015 while 'quality of food' noted an increase over the three years.



Chart 69: Q39 Satisfaction with accommodation by Province (Index)

Base: 3,550



Base: All visitors in paid accommodation

Differences by Province are:

- Nadroga/Navosa is above average for:
 - Courtesy of staff (93.1)

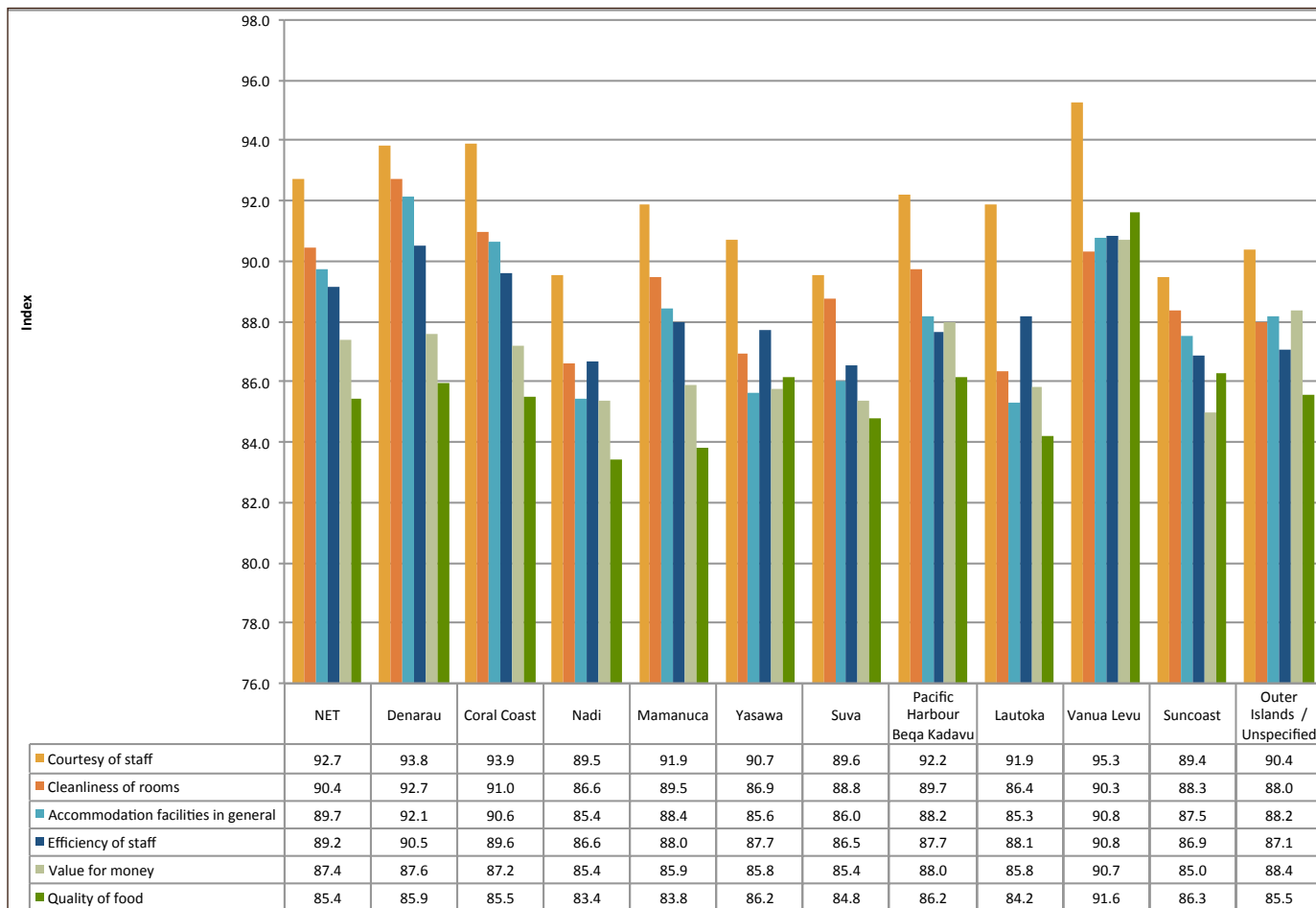
- Rewa is below average for
 - Courtesy of staff (90.2)
 - Accommodation facilities in general (86.8)
 - Efficiency of staff (87.0)

- Cakaudrove is above average for:
 - Courtesy of staff (95.6)
 - Efficiency of staff (92.1)
 - Value for money (90.7)
 - Quality of food (89.8)



Chart 70: Q39 Satisfaction with accommodation by Tourism Area (Index)

Base: 3,550



Base: All visitors in paid accommodation

Differences by Tourism Area are:

- Nadi is below average for all six aspects of accommodation.

- Coral Coast is above average for:
 - Courtesy of staff (93.9)
 - Accommodation facilities in general (90.6)

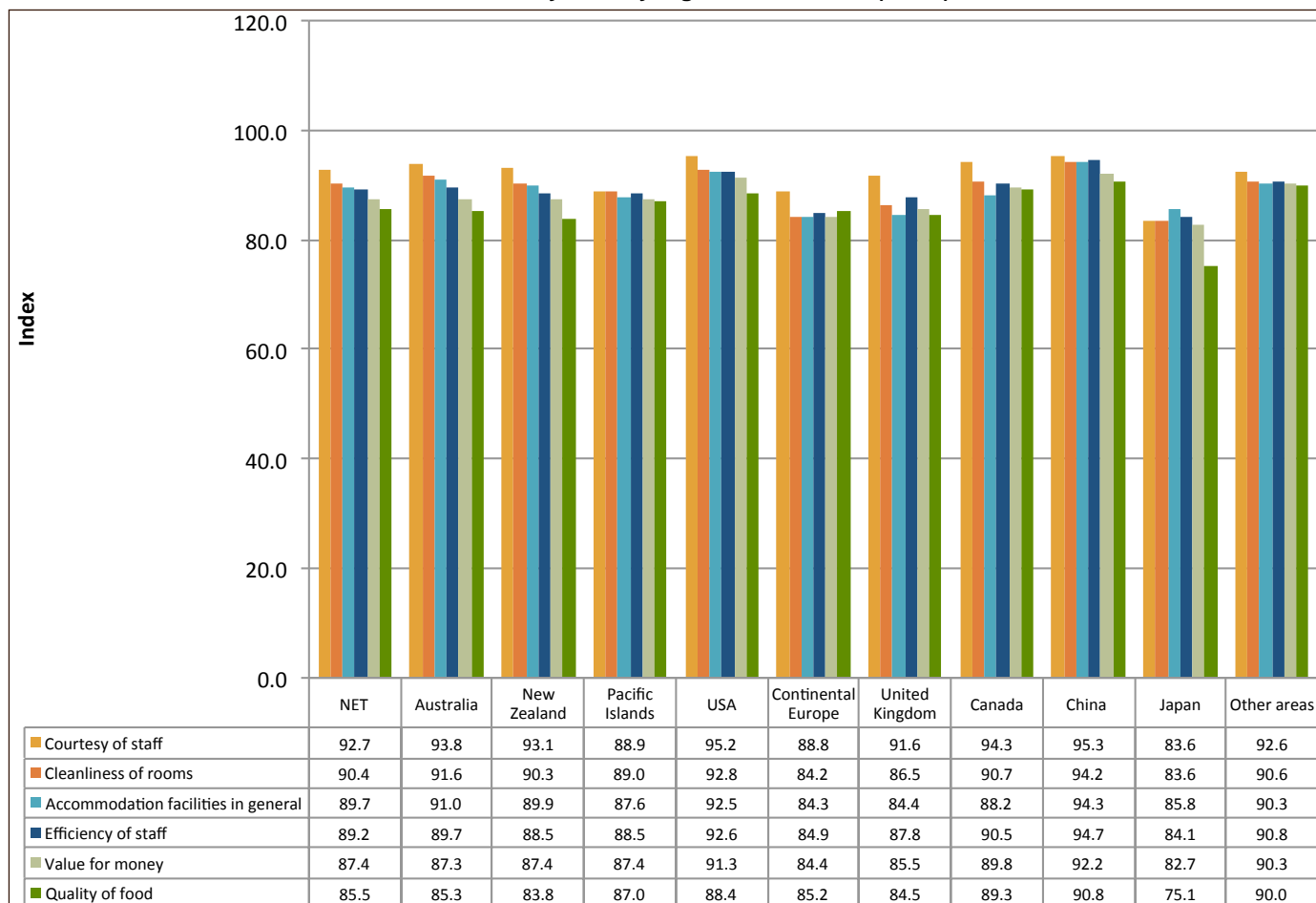
- Denarau is above average for:
 - Courtesy of staff (93.8)
 - Cleanliness of rooms (92.7)
 - Accommodation facilities in general (92.1)
 - Efficiency of staff (90.5)

- Vanua Levu is above average for:
 - Courtesy of staff (95.3)
 - Value for money (90.7)
 - Quality of food (91.6)



Chart 71: Q39 Satisfaction with accommodation by country/region of residence (Index)

Base: 3,600



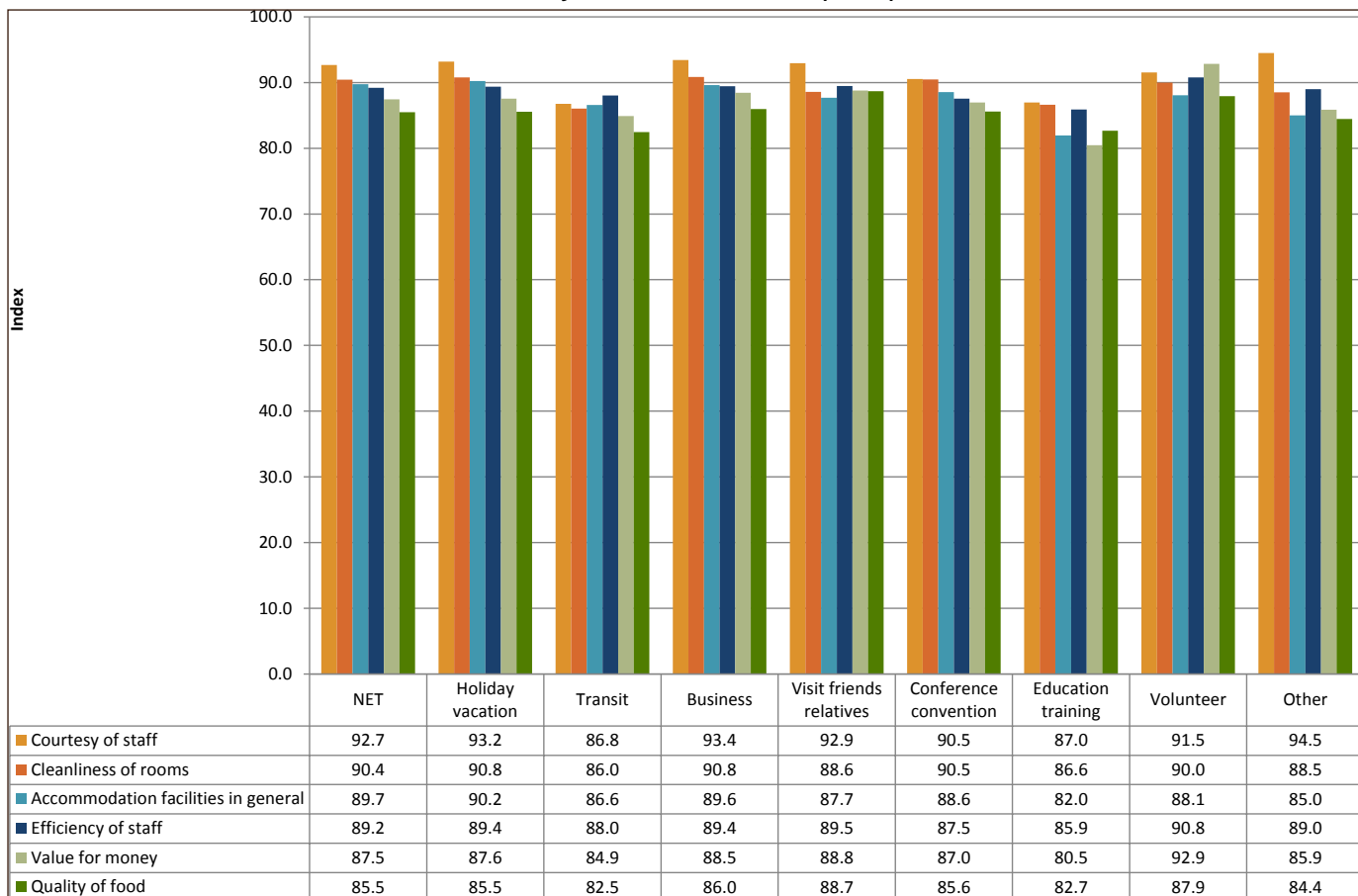
Base: All visitors in paid accommodation

- Visitors from China and USA had above the average ratings for all six aspects of accommodation.
- Visitors from Australia had above average ratings for:
 - Courtesy of staff (93.8)
 - Cleanliness of rooms (91.6)
 - Accommodation facilities in general (91.0)
 - Efficiency of staff (89.7)
- Visitors from Continental Europe had below average ratings for:
 - Courtesy of staff (88.8)
 - Cleanliness of rooms (84.2)
 - Accommodation facilities in general (84.3)
 - Efficiency of staff (84.9)
 - Value for money (84.4)



Chart 72:Q39 Satisfaction with accommodation by main reason for visit (Index)

Base: 3,601



Base: All visitors in paid accommodation

- Visitors for a holiday/vacation had above average ratings for:
 - Courtesy of staff (93.2)
 - Cleanliness of rooms (90.8)
 - Accommodation facilities in general (90.2)
- Volunteers had above average ratings for 'value for money' (92.9)

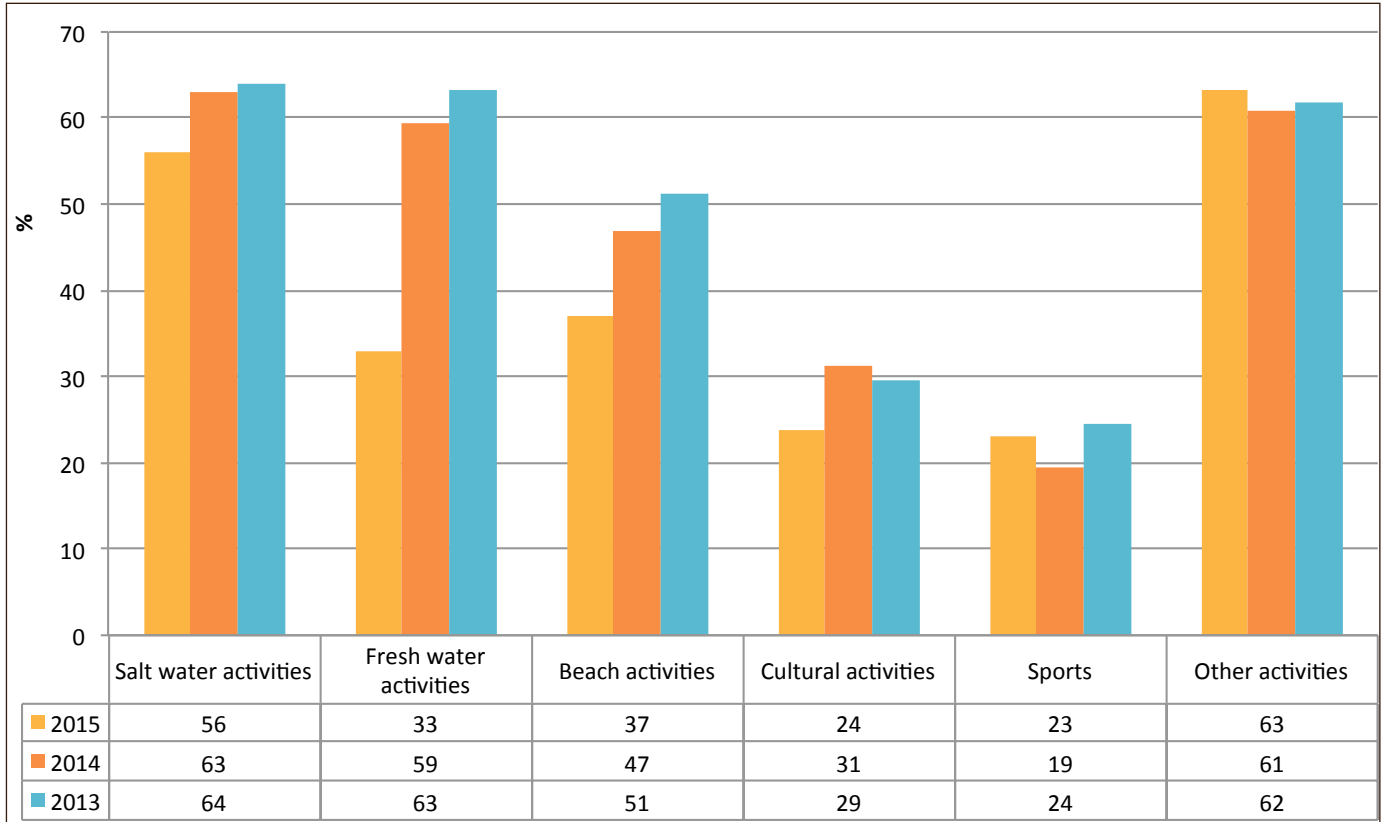
8 ACTIVITIES

8.1 Activities carried out while in Fiji

Seventy-nine percent (79%) of visitors to Fiji carried out activities in 2015.

Chart 73: Q52 Activities carried out in Fiji

Base: 1,441



Base: All visitors in paid accommodation

In 2015, visitors are more likely to participate in the following activities:

- Saltwater activities (56%)
- Beach activities (37%)
- Fresh water activities (33%)

The percentage of visitors participating in 'salt water activities', 'fresh water activities' and 'beach activities' declined over the three years while visitors participating in 'cultural activities' noted an increase from 2013 to 2014 and a decrease from 2014 to 2015.

**Table 21: Q52 Activities carried out in Fiji****Base: 1,441**

| Activities | % |
|------------------------|----|
| Swimming - salt water | 39 |
| Beach walking | 33 |
| Snorkelling | 32 |
| Swimming - fresh water | 29 |
| Massage/spa | 29 |
| Laying on beach | 28 |
| Shopping | 20 |
| Kava drinking/ceremony | 15 |
| Laying on poolside | 14 |
| Walking | 14 |
| Other | 13 |
| Village visit / tour | 11 |
| Canoeing/kayaking | 10 |
| Scuba diving | 8 |
| Meke | 7 |
| Firewalking | 7 |
| Hair braiding | 7 |
| Beach volleyball | 6 |
| Boat ride | 6 |
| Reading | 5 |
| Golf | 5 |
| Coral viewing | 4 |
| Bushwalking/hiking | 4 |
| Church service | 3 |
| Crab race/frog race | 3 |
| Jet ski | 3 |
| Other fishing | 3 |
| Fish feeding | 3 |
| Cinema | 3 |
| Manicure/facial | 3 |
| Weaving | 2 |
| Dancing/night club | 2 |
| Parasailing | 2 |

| Activities | % |
|---------------------------------|---|
| Choir/concert | 2 |
| Sailing/yachting | 2 |
| Surfing | 2 |
| Deep/big game fishing | 2 |
| Tennis | 2 |
| Volleyball | 2 |
| Pool games | 2 |
| Pool/billiards | 2 |
| Horse riding | 1 |
| Cultural centre/fort etc. | 1 |
| Babysitting | 1 |
| Banana boat | 1 |
| Reef walking | 1 |
| Canoeing/kayaking - fresh water | 1 |
| Museum visit | 1 |
| Boat ride - fresh water | 1 |
| Football/rugby | 1 |
| Gym | 1 |
| Bike riding/cycling | 1 |
| Jet boat | 1 |
| Rafting/bilibili - fresh water | 1 |
| Running/jogging | 1 |
| Dolphin watching | 0 |
| Sky diving | 0 |
| Bird watching | 0 |
| Bowls | 0 |
| Fishing | 0 |
| Motor bike riding | 0 |
| Wind surfing | 0 |
| Jet boat - fresh water | 0 |
| Squash | 0 |
| Water skiing | 0 |

The most popular activities carried out by visitors include:

- Swimming in salt water (39%)
- Beach walking (33%)
- Snorkelling (32%)
- Swimming in fresh water (29%)
- Massage/spa (29%)
- Laying by the beach (28%)
- Shopping (20%)
- Kava drinking/ceremony (15%)
- Laying on poolside (14%)
- Walking (14%)
- Other (13%)
- Village visit / tour (11%)
- Canoeing/kayaking (10%)
- Scuba diving (8%)

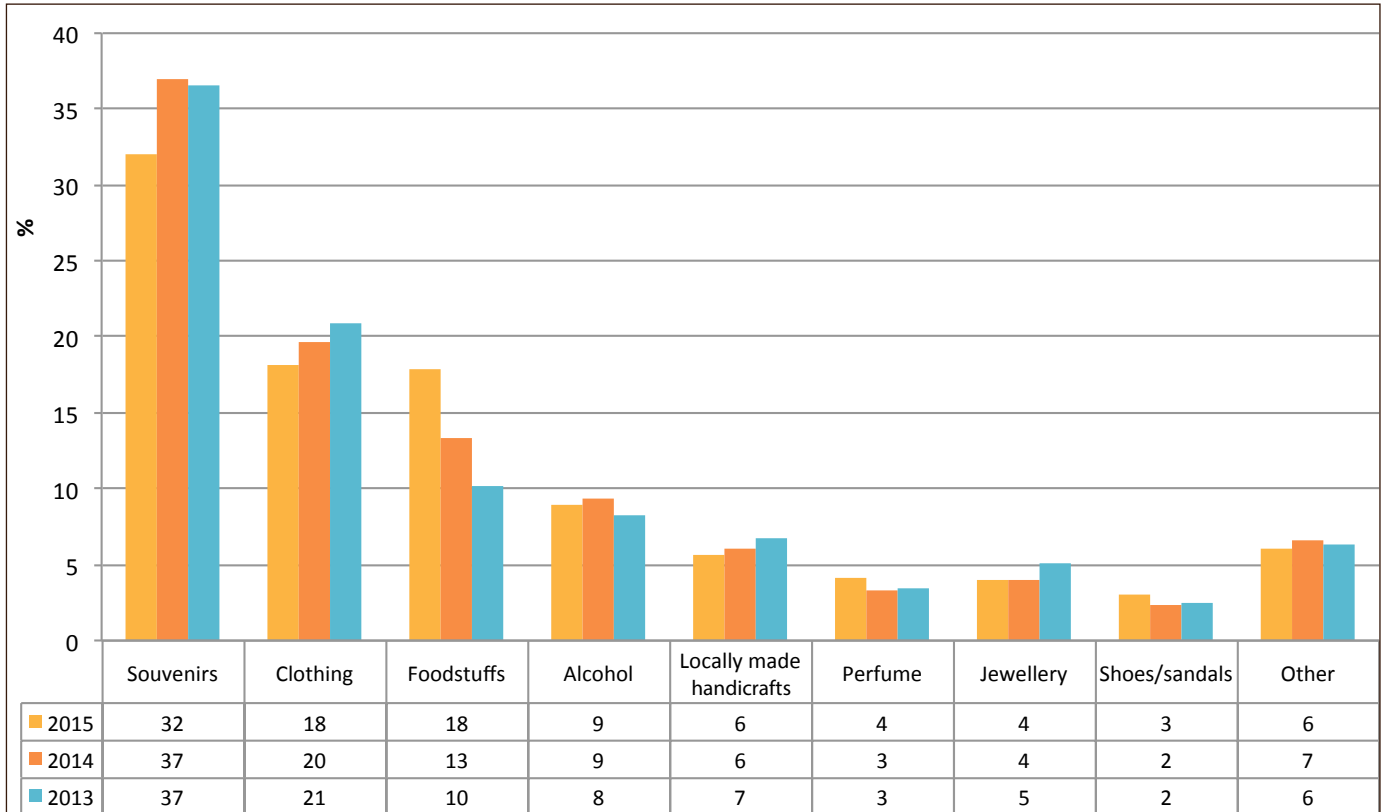


8.2 Purchases made in Fiji

Seventy-six percent (76%) of visitors made purchases while in Fiji including items purchased at the Nadi International Airport. This is higher than the figure of people who listed shopping (20%) as an activity as it includes incidental purchases not thought of as a 'shopping activity'.

Chart 74: Q78 Purchases made in Fiji

Base: 4,702 (2015)



Base: All visitors who made purchases in Fiji (includes transit passengers)

In 2015, the most common purchases by visitors were 'souvenirs' (32%) followed by:

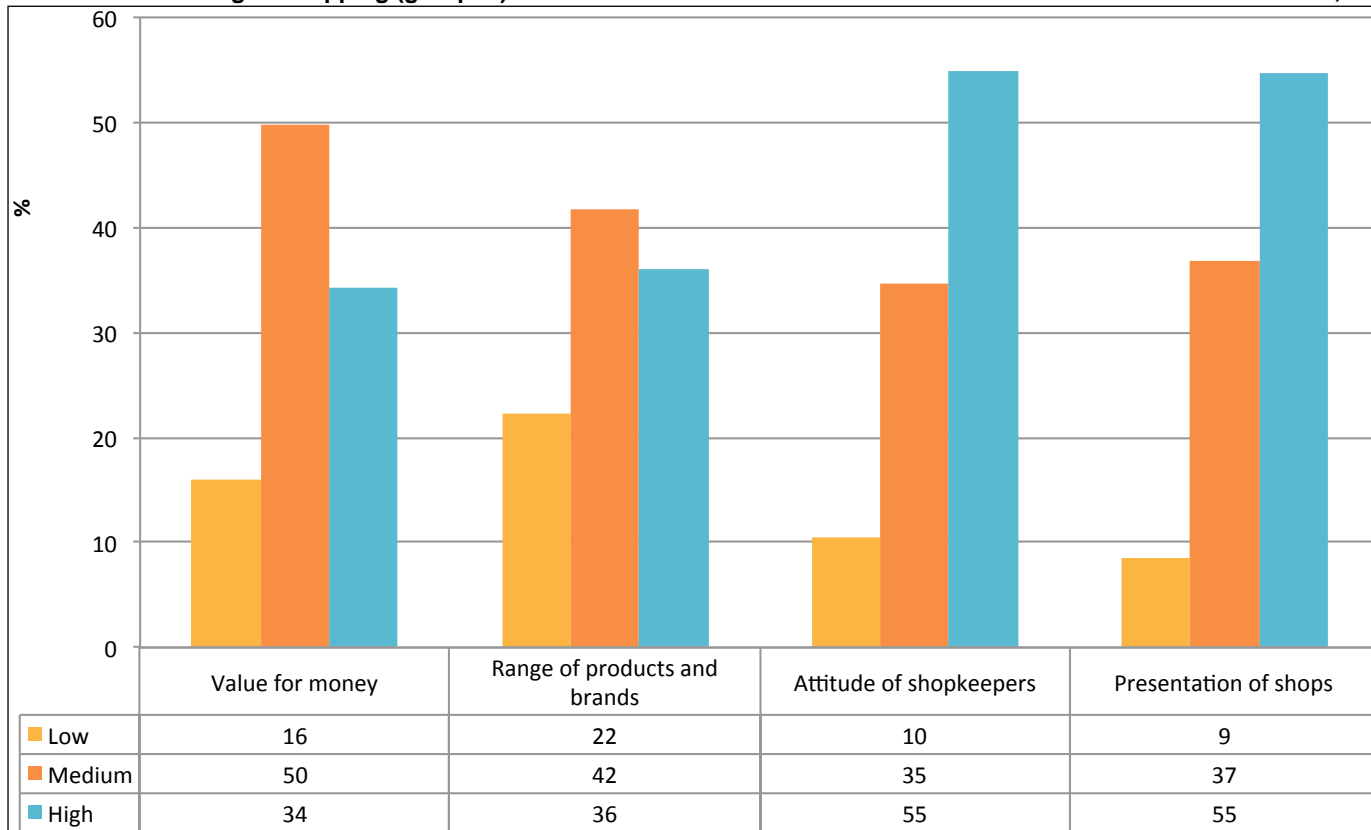
- Clothing (18%)
- Foodstuffs (18%)

The percentage of visitors that purchased 'foodstuffs', 'alcohol', 'perfume' and 'shoes/sandals' had increased over the three years while the purchase of 'souvenirs', 'clothing', 'locally made handicrafts' and 'jewellery' had declined.



Chart 75: Q79 Rating of shopping (grouped)

Base: 2,468



Base: All visitors who made purchases ('don't know' has been excluded)

Research participants were asked to rate their shopping experience on a scale of 0 to 10 (where 0 = extremely poor and 10 = extremely good) on four aspects of shopping.

These have been grouped into:

- 0 to 6 = low
- 7 or 8 = medium
- 9 or 10 = high

Categories with 'high' ratings are:

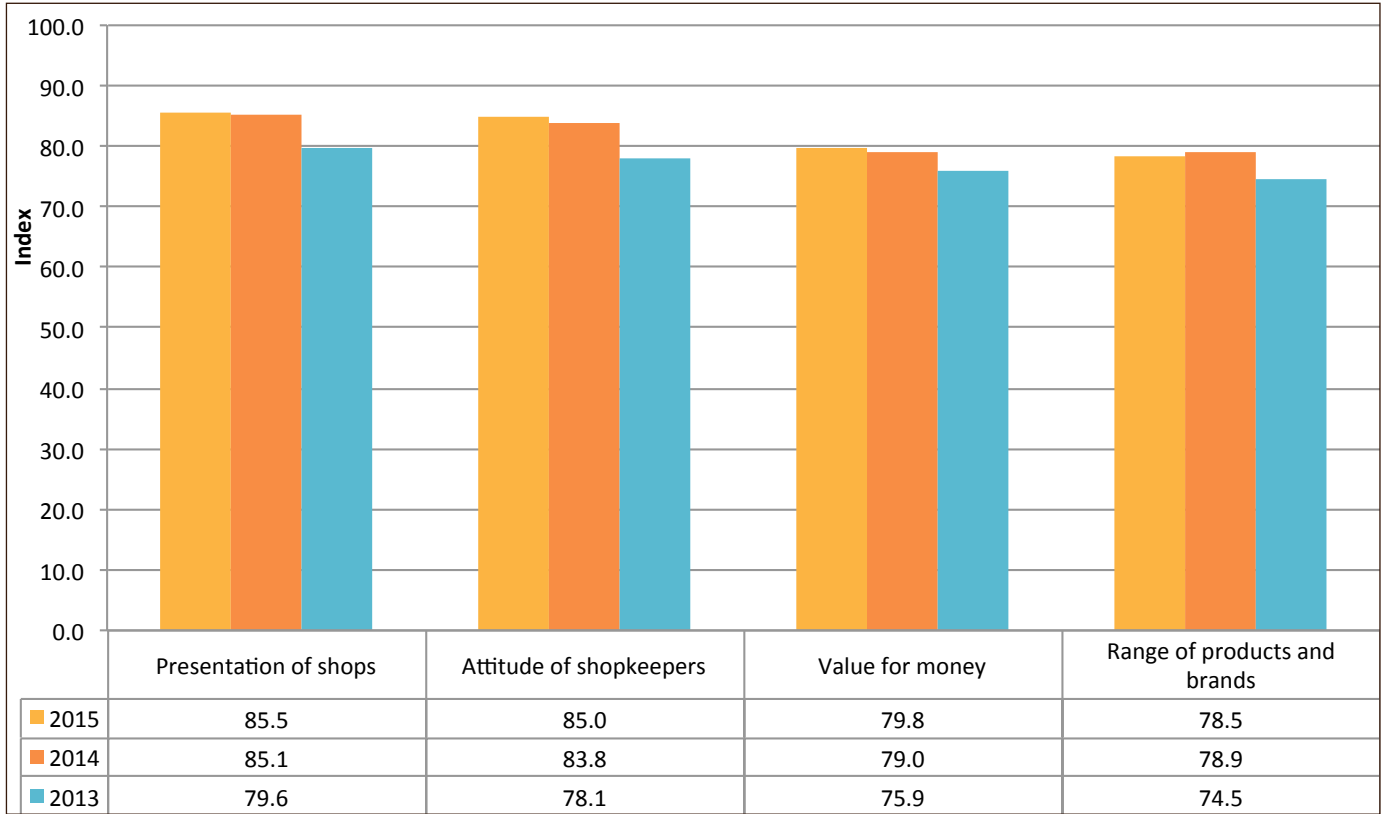
- Attitude of shopkeepers (55%)
- Presentation of shops (55%)

'Range of products and brands' (36%) and 'value for money' (34%) were categories with below average 'high' ratings.



Chart 76: Q79 Rating of shopping (Index)

Base: 2,453 (2015)



Base: Visitors who made purchases ('don't know' has been excluded)

Converting the rating to an index (score out of 100) shows the overall high satisfaction with shopping in Fiji.

'Presentation of shops', 'attitude of shopkeepers' and 'value for money' had increased over the three years while 'range of products and brands' noted an increase from 2013 to 2014 and a slight decrease from 2014 to 2015.



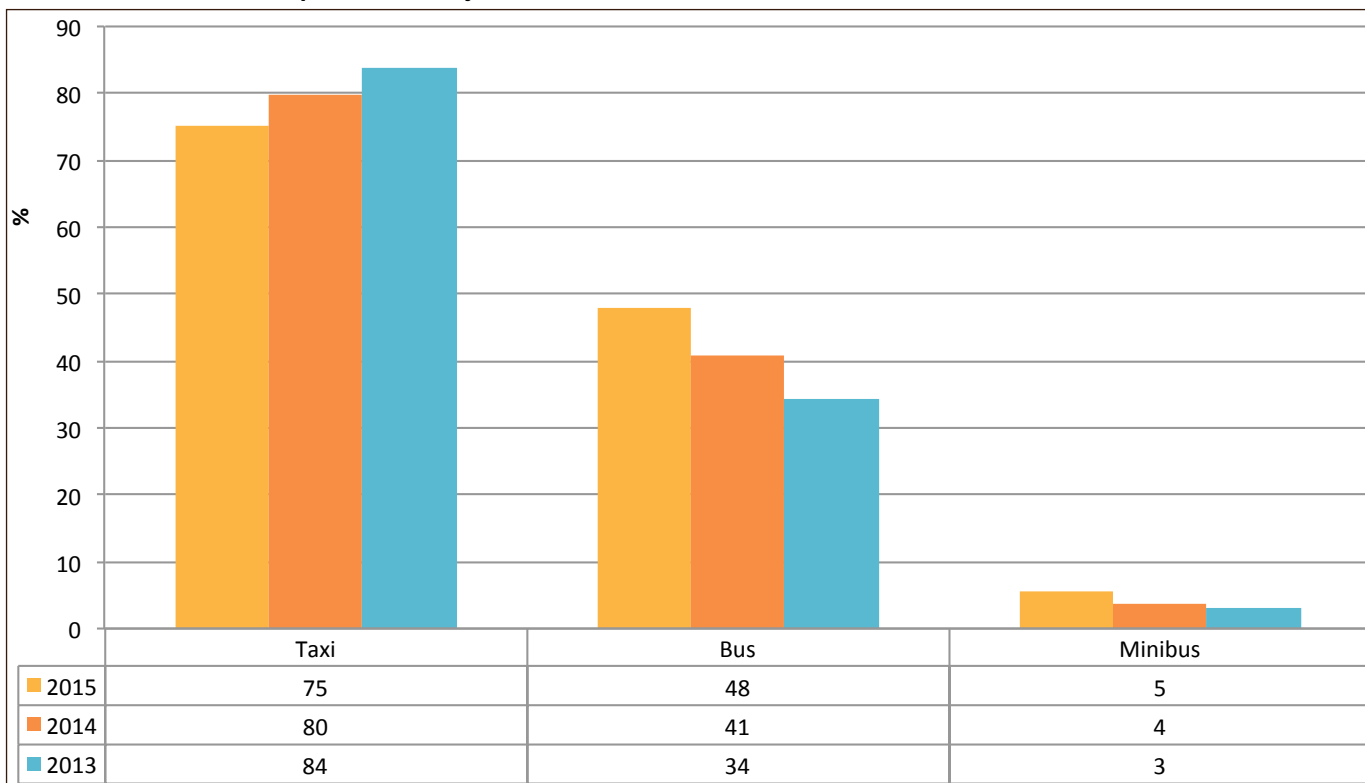


8.3 Use of public transport in Fiji

Forty-three percent (43%) of visitors took public transport while in Fiji.

Chart 77: Q50 Public transport used in Fiji

Base: 1,679



Base: All visitors who took public transport in Fiji

In 2015, seventy-five percent (75%) of visitors had used a taxi, forty-eight percent (48%) a bus and five percent (5%) a minibus.

The percentage of visitors using a taxi declined over the three years while visitors travelling by bus and minibus had increased.



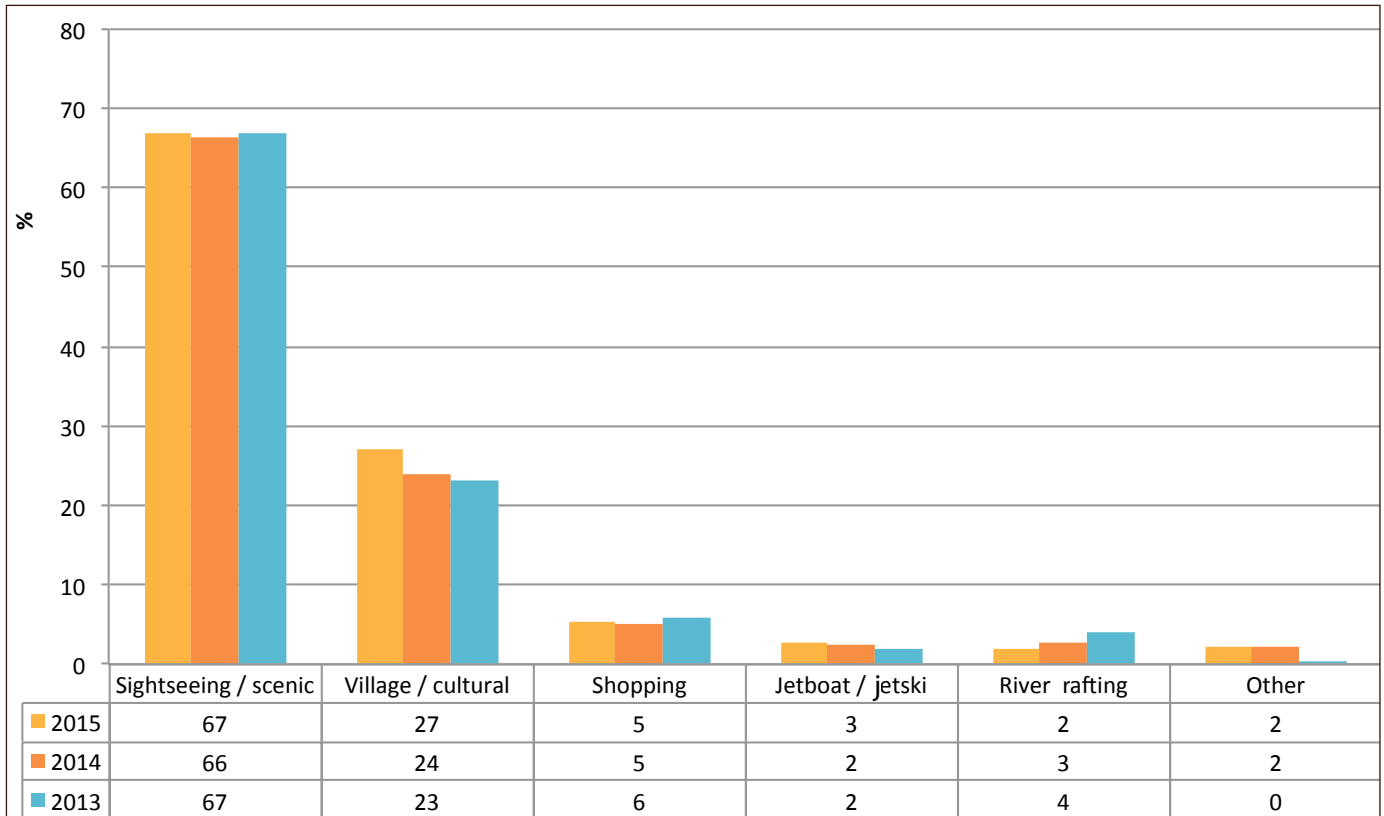
8.4 Organised tours

In 2015, nine percent (9%) of visitors took an organised tour while in Fiji whereas visitors for 'holiday/vacation', eleven percent (11%) took an organised tour.

On average, visitors took one (1) organised tour.

Chart 78: Q57 Type of organised tour

Base: 371 (2015)



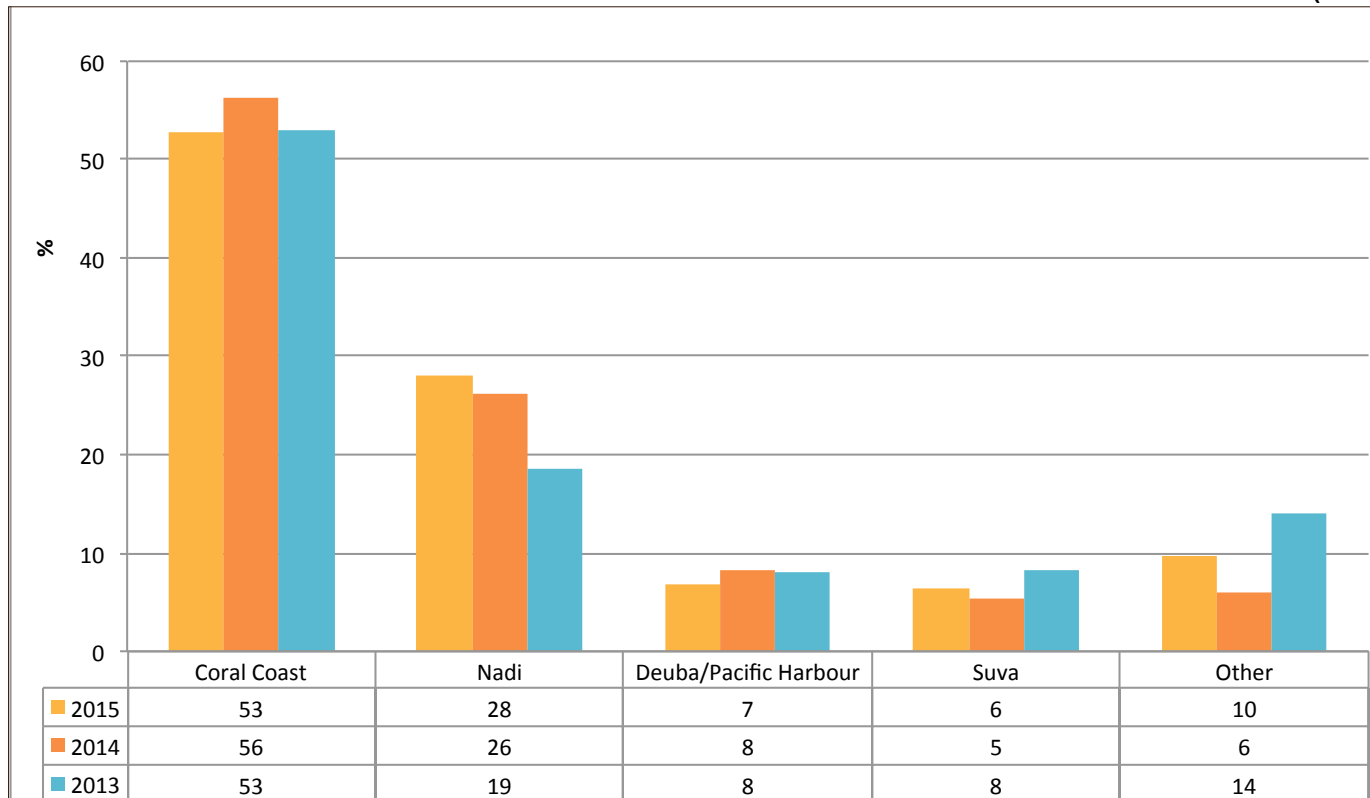
Base: All visitors who took an organised tour

In 2015, the main type of organised tour taken is 'sightseeing/scenic' (67%), 'village/cultural' (27%) and 'shopping' (5%).

The percentage of visitors taking a 'shopping' tour and 'river rafting' tour declined over the three years while visitors taking a 'village/cultural' tour and 'jet boat/jet ski' tour increased. Also, the percentage of visitors taking a 'sightseeing/scenic' tour slightly decreased from 2013 to 2014 and slightly increased from 2014 to 2015.

Chart 79: Q58 Location of tour

Base: 372 (2015)



Base: All visitors who took an organised tour

In 2015, over half (53%) of the organised road tours were in the Coral Coast, twenty-eight percent (28%) were in Nadi, seven percent (7%) in Deuba/Pacific Harbour and six percent (6%) were in Suva. 'Other' areas included:

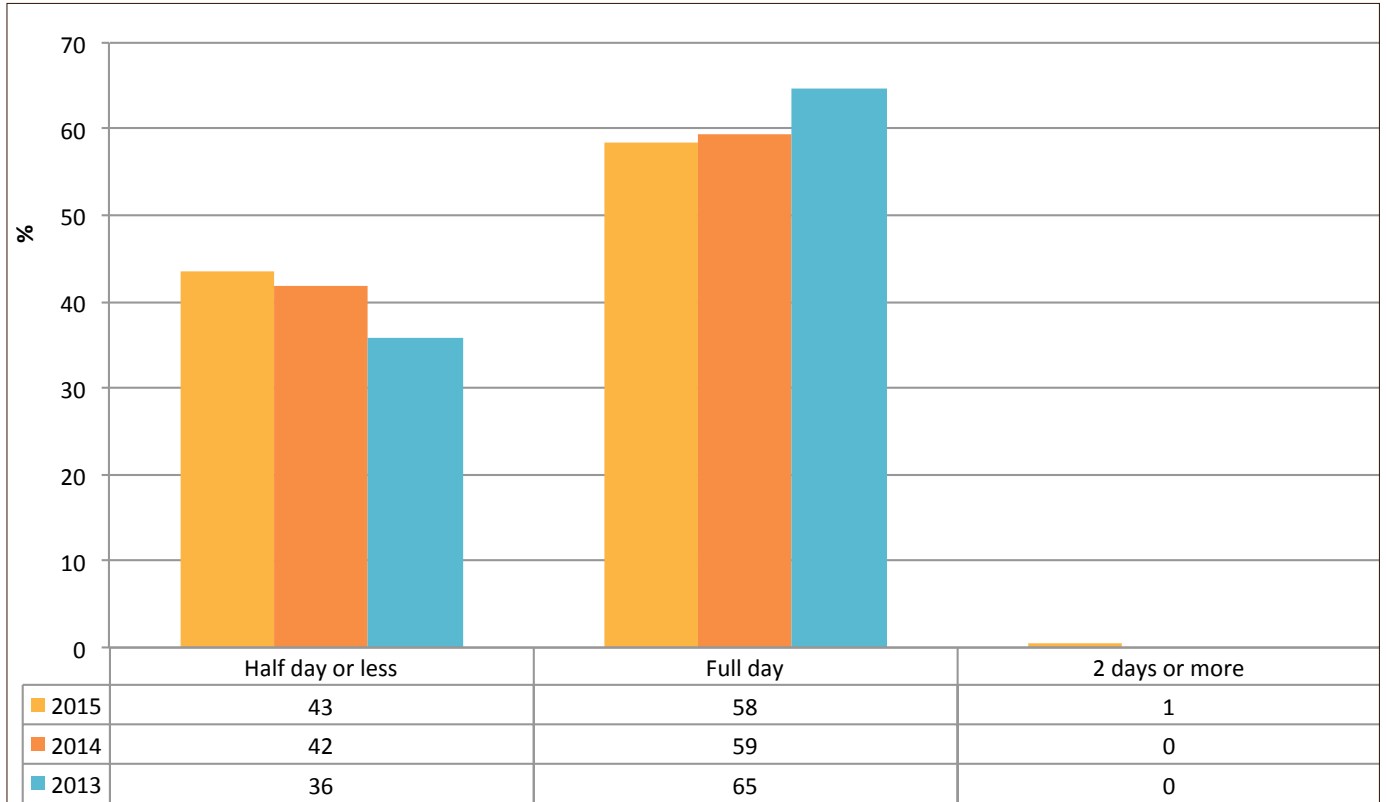
- Lautoka (3%)
- Around the island (3%)
- Taveuni/islands off Taveuni (2%)
- Mamanuca Islands (1%)
- Other (1%)

The percentage of visitors taking an organised tour in Nadi increased over the three years while visitors taking an organised tour in Deuba/Pacific Harbour had decreased. Additionally, the percentage of visitors taking an organised tour in Suva decreased from 2013 to 2014 and increased from 2014 to 2015 while visitors taking an organised tour in the Coral Coast noted an increase from 2013 to 2014 and a decrease from 2014 to 2015.



Chart 80: Q59 Length of tour

Base: 368 (2015)



Base: All visitors who took an organised tour

In 2015, forty-three percent (43%) of organised road tours were for half day or less, fifty-eight percent (58%) were for a full day and one percent (1%) were for two days or more.

The percentage of visitors taking an organised road tour that were for half day or less increased over the three years while organised road tours that were for a full day had decreased.





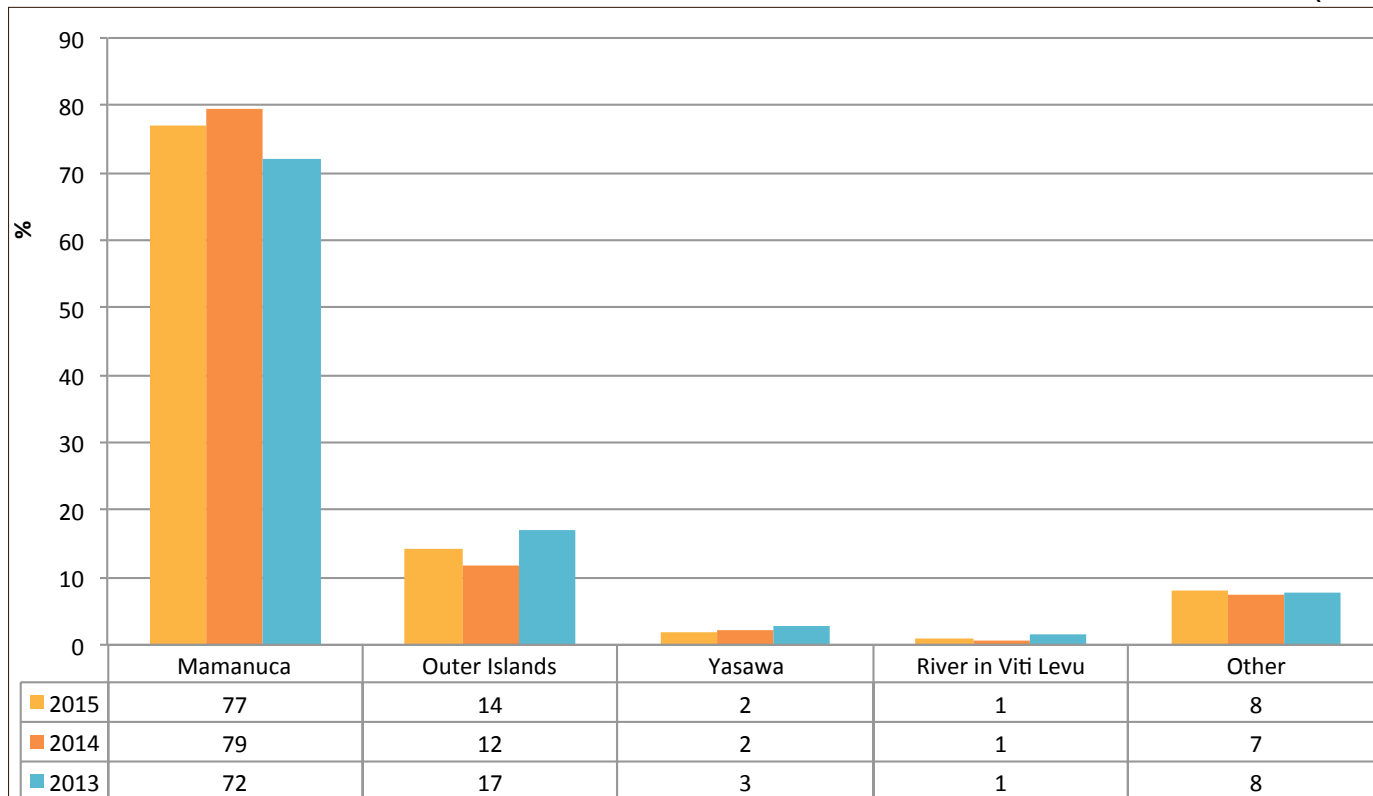
8.5 Organised cruises

In 2015, twenty-three percent (23%) of visitors took an organised cruise, whereas visitors for 'holiday/vacation', twenty-eight percent (28%) took an organised cruise.

On average, visitors took 1.5 organised cruises.

Chart 81: Q66 Area of cruise

Base: 924 (2015)



Base: All visitors who took an organised cruise

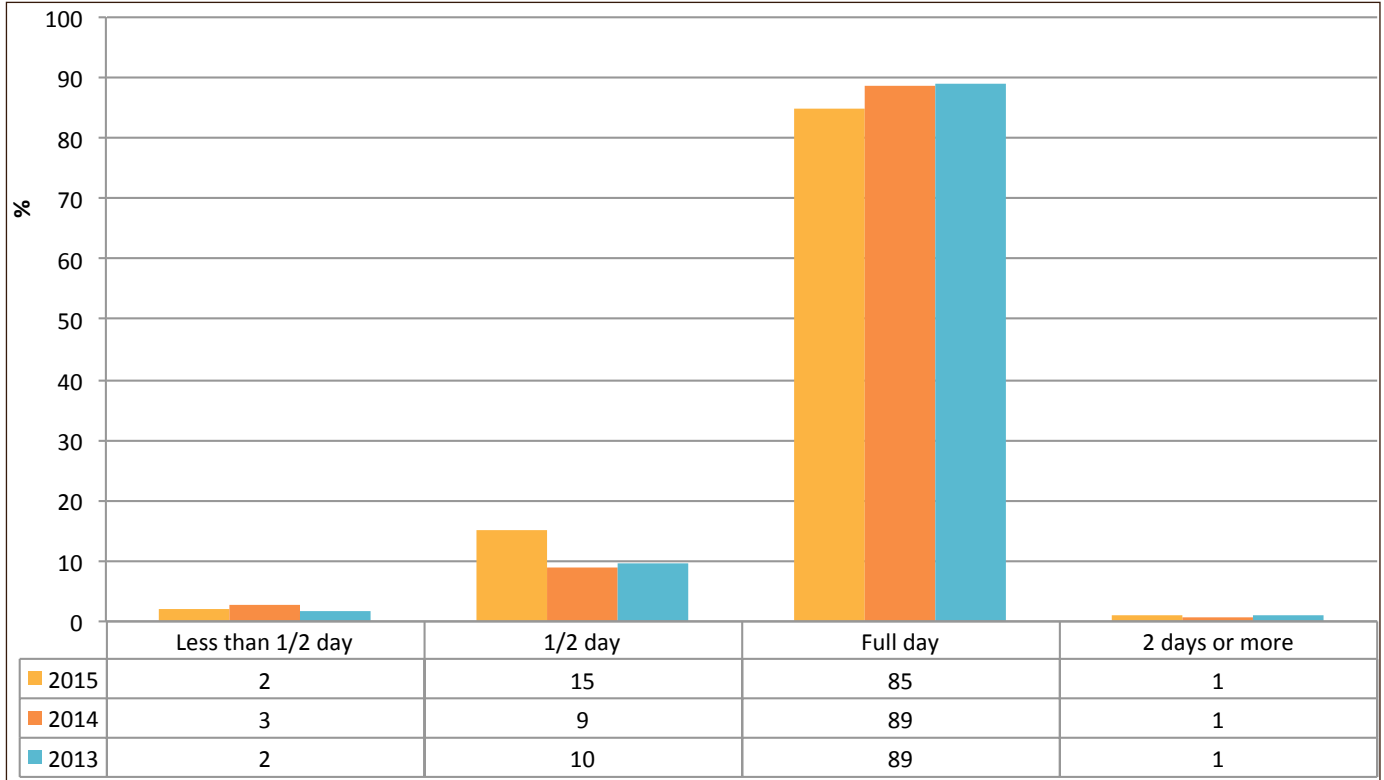
In 2015, seventy-seven percent (77%) of organised cruises were in Mamanuca, fourteen percent (14%) in the Outer Islands while two percent (2%) were in Yasawa.

The percentage of visitors taking an organised cruise in Mamanuca increased from 2013 to 2014 and decreased from 2014 to 2015 while visitors taking an organised cruise in the Outer Islands noted a decrease from 2013 to 2014 and an increase from 2014 to 2015. Also, visitors taking an organised cruise in Yasawa slightly decreased over the three years.



Chart 82: Q67 Length of cruise

Base: 923 (2015)



Base: All visitors who took an organised cruise

In 2015, most organised cruises were for a full day (85%), fifteen percent (15%) were a half-day cruise while only two percent (2%) were less than half a day cruise.

The percentage of visitors taking a full day cruise noted a decrease over the three years while organised cruises that were for half day decreased from 2013 to 2014 and increased from 2014 to 2015. Also, organised cruises that were less than half-day noted an increase from 2013 to 2014 and a decrease from 2014 to 2015.

8.6 Air travel in Fiji

In 2015, three percent (3%) of visitors took additional air travel of which eighty-one percent (81%) were return flights while nineteen percent (19%) were one-way trips. The average additional air travel taken is 1.1 flights.

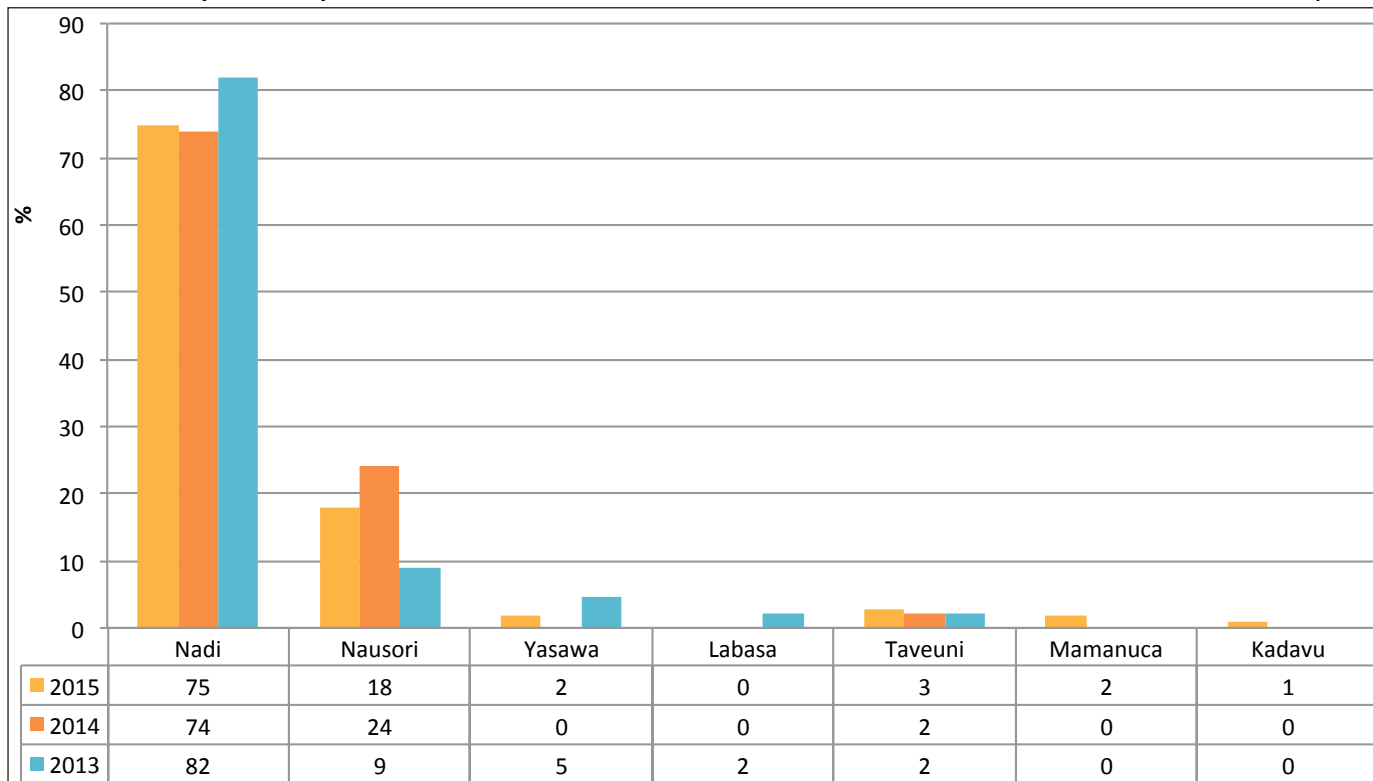
The percentage of visitors taking additional air travel while in Fiji remained the same from 2013 to 2015.





Chart 83: Q73 Departure airport for additional air travel

Base: 111 (2015)



Base: All visitors who took additional air travel

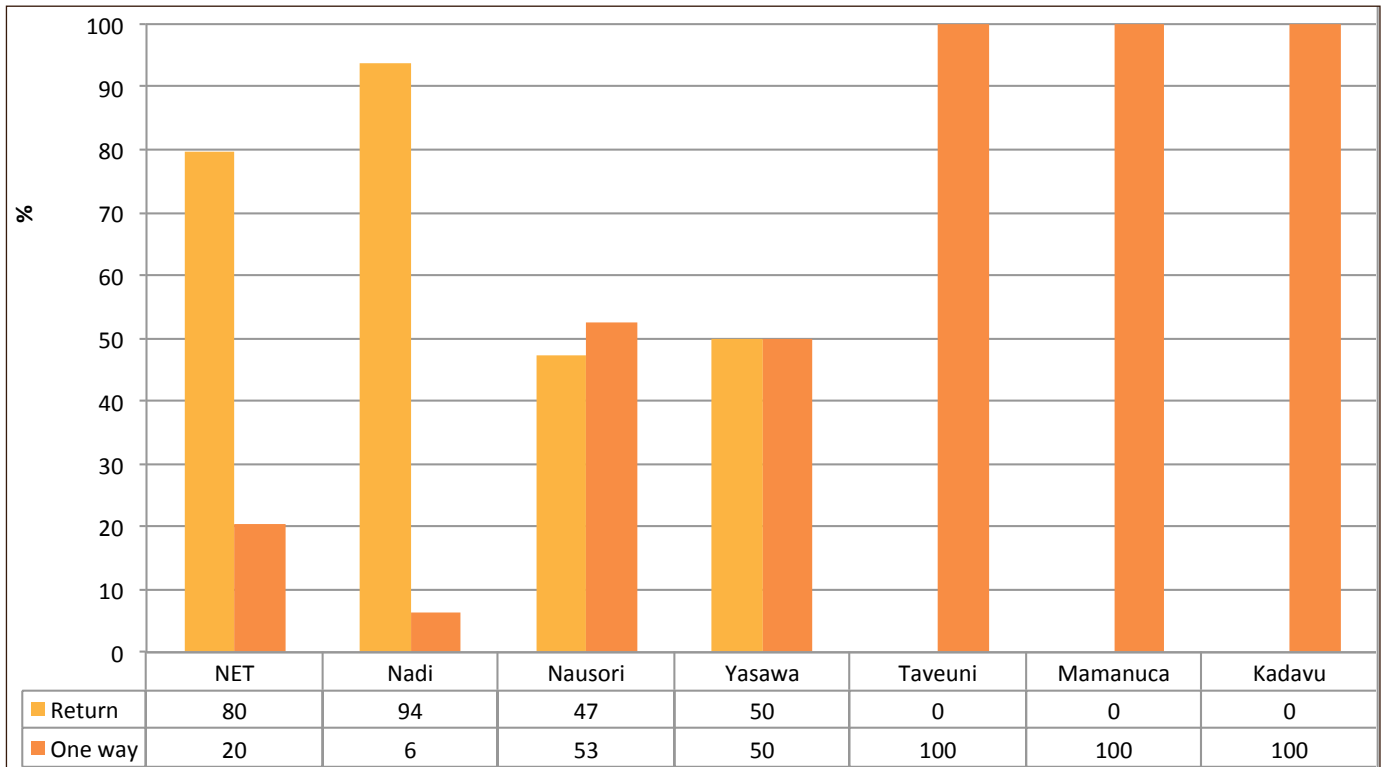
In 2015, seventy-five percent (75%) of additional air travel departed from Nadi, eighteen percent (18%) departed from Nausori while three percent (3%) departed from Taveuni.

The percentage of visitors taking additional air travel departing Nadi and Yasawa decreased from 2013 to 2014 and increased from 2014 to 2015 whereas visitors departing Nausori noted an increase from 2013 to 2014 and a decrease from 2014 to 2015. Also, additional air travel departing Taveuni noted an increase over the three years.



Chart 84: Q75 Return or one-way additional air travel by departure airport

Base: 108



Base: All visitors who took additional air travel

Eighty percent (80%) of additional air travel were return flights while twenty percent (20%) were one way trips. This varied by the departure airport including:

- Nadi
 - Return flight (94%)
 - One way trip (6%)

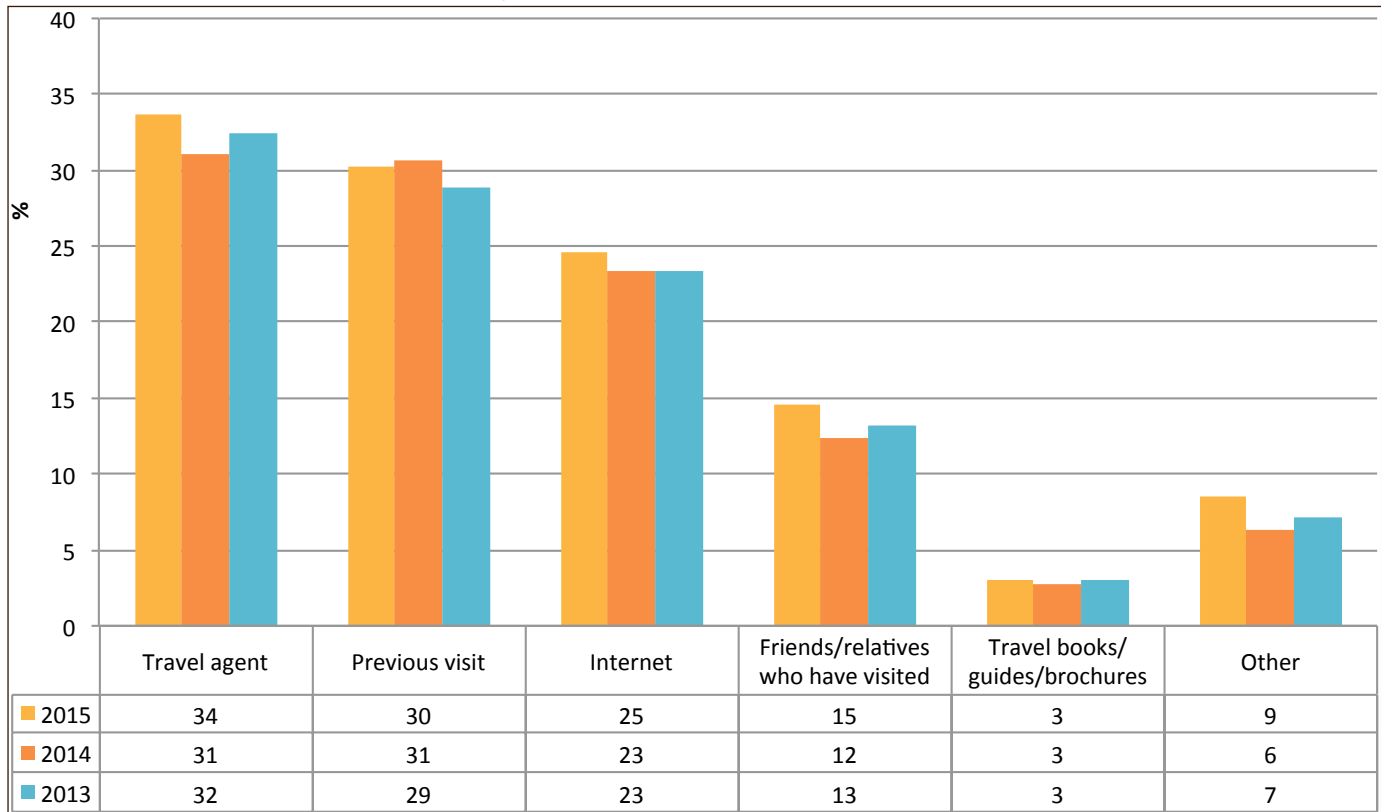
- Nausori
 - Return flight (47%)
 - One way trip (53%)



9 INFORMATION SOURCES

Chart 85: Q19 Information sources about Fiji

Base: 4,051



Base: All visitors to Fiji

In 2015, the key sources of information for visitors in planning a trip to Fiji include:

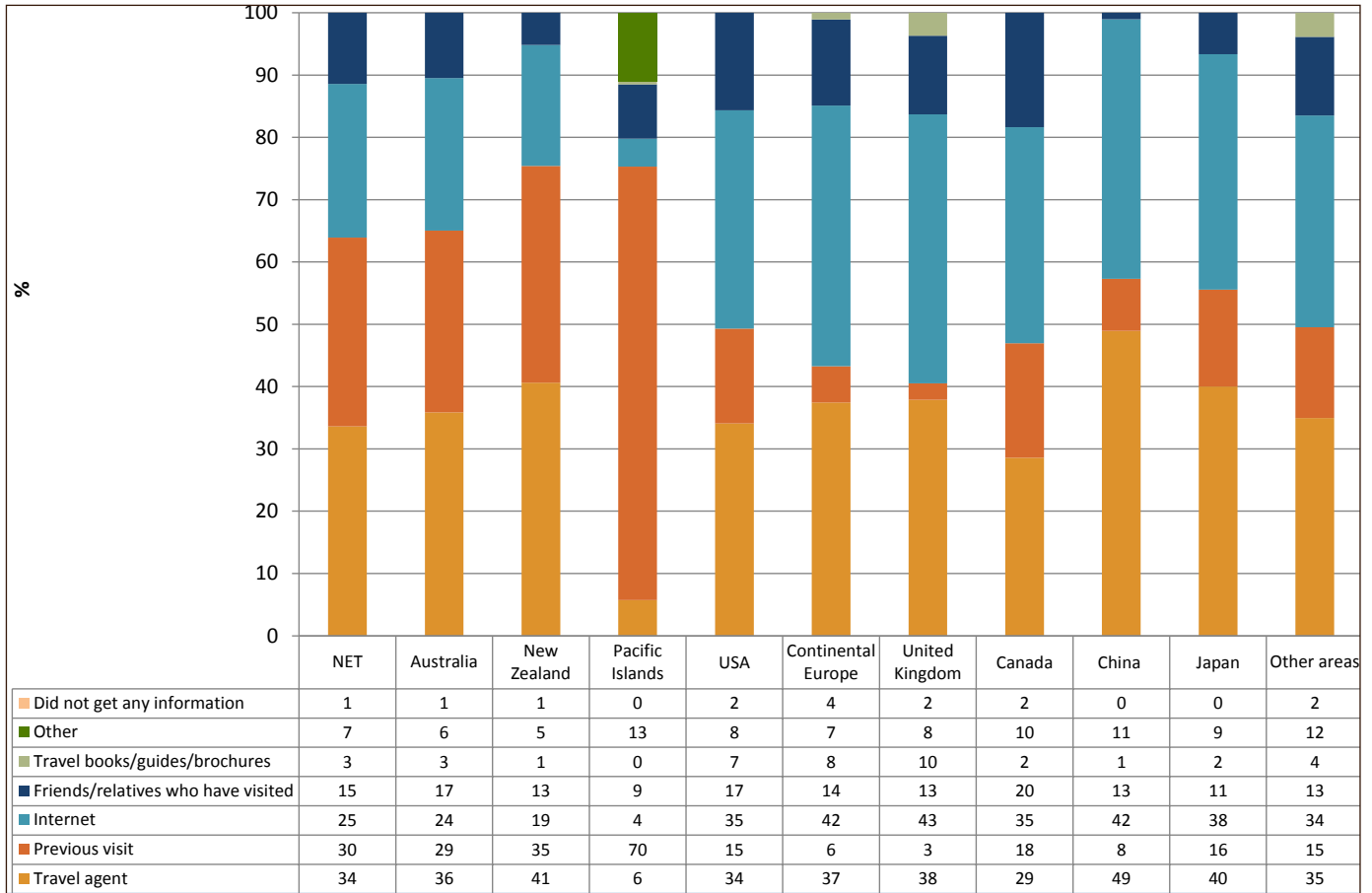
- Travel agent (34%)
- Previous visit (30%)
- Internet (25%)
- Friends/relatives who have visited (15%)

The percentage of visitors that used 'travel agent' and 'friends/relatives who have visited' as sources of information noted a decrease from 2013 to 2014 and an increase from 2014 to 2015 while visitors using 'previous visit' as a source of information noted an increase from 2013 to 2014 and a decrease from 2014 to 2015. Additionally, the percentage of visitors using the 'internet' as a source of information increased over the three years.



Chart 86: Q19 Information sources by country and region of residence

Base: 4,039



Base: All visitors to Fiji

Visitors using 'travel agents' as an information source for planning a trip to Fiji is higher than average for:

- China (49%)
- New Zealand (41%)
- Japan (40%)

Visitors using 'previous visit' as an information source is higher than average for:

- Pacific Islands (70%)
- New Zealand (35%)

Visitors using the 'internet' as an information source is higher than average for:

- United Kingdom (43%)
- Continental Europe and China (42%)
- Japan (38%)
- USA and Canada (35%)

10 EXPENDITURE DATA (DETAILED TABLES)

Table 22: Estimated total spend by category

| Total | Expenditure |
|--------------------------------|------------------------|
| Hotel | |
| Total package and pre-paid | \$1,086,408,850 |
| Additional accommodation | \$36,972,349 |
| Additional food and drinks | \$140,559,776 |
| Additional expenditure | \$73,394,048 |
| Total hotel expenditure | \$1,337,335,024 |
| Transfers | \$11,866,834 |
| Non-hotel F&B | \$65,955,136 |
| Retail purchases | \$106,006,125 |
| Activities | \$21,671,322 |
| Tours | \$8,689,491 |
| Cruises | \$6,753,970 |
| Rental cars | \$6,478,812 |
| Public transport | \$13,751,542 |
| <i>Domestic airfare*</i> | <i>\$468,377</i> |
| TOTAL EXPENDITURE | \$1,578,976,633 |

* Small base size



Table 23: Estimated total spend by Province

| | NET | Ba | Nadroga/Navosa | Rewa | Serua | Cakaudrove | Other Provinces | Unspecified |
|--------------------------------|------------------------|----------------------|----------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Total package and pre-paid | \$1,086,408,850 | \$449,666,014 | \$416,984,147 | \$60,316,994 | \$28,511,215 | \$34,150,241 | \$53,603,584 | \$43,176,655 |
| Additional accommodation | \$36,972,349 | \$13,966,565 | \$9,774,786 | \$4,726,521 | \$837,424 | \$1,331,864 | \$1,709,242 | \$4,625,948 |
| Additional food and drinks | \$140,559,776 | \$57,337,750 | \$67,692,622 | \$4,595,780 | \$2,809,163 | \$2,754,871 | \$3,428,061 | \$1,941,531 |
| Additional expenditure | \$73,394,048 | \$25,908,495 | \$32,220,504 | \$3,524,138 | \$1,476,319 | \$1,389,623 | \$2,298,957 | \$6,576,014 |
| Total hotel expenditure | \$1,337,335,024 | \$546,878,823 | \$526,672,059 | \$73,163,433 | \$33,634,120 | \$39,626,599 | \$61,039,844 | \$56,320,147 |
| Transfers | \$11,866,834 | \$4,531,866 | \$3,005,841 | \$1,539,188 | \$347,139 | \$592,826 | \$867,648 | \$982,326 |
| Non-hotel F&B | \$65,955,136 | \$33,464,323 | \$13,856,853 | \$6,521,760 | \$1,853,891 | \$1,474,113 | \$2,585,490 | \$6,198,706 |
| Retail | \$106,006,125 | \$47,301,411 | \$28,354,491 | \$12,186,322 | \$2,070,708 | \$4,170,452 | \$2,192,386 | \$9,730,354 |
| Activities | \$21,671,322 | \$8,798,578 | \$7,272,815 | \$943,401 | \$934,074 | \$942,707 | \$1,499,305 | \$1,280,441 |
| Tours | \$8,689,491 | \$3,520,245 | \$4,279,326 | \$126,734 | \$386,414 | \$82,004 | \$150,142 | \$144,626 |
| Cruises | \$6,753,970 | \$4,044,025 | \$2,260,383 | \$74,973 | \$100,001 | \$45,204 | \$63,341 | \$166,043 |
| Rental cars | \$6,478,812 | \$1,801,281 | \$1,864,527 | \$796,365 | \$539,737 | \$190,909 | \$406,619 | \$879,374 |
| Public transport | \$13,751,542 | \$5,645,623 | \$3,061,216 | \$2,101,752 | \$352,736 | \$426,370 | \$678,253 | \$1,485,592 |
| TOTAL EXPENDITURE | \$1,578,508,256 | \$655,986,176 | \$590,627,510 | \$97,453,927 | \$40,218,819 | \$47,551,185 | \$69,483,029 | \$77,187,610 |



Table 24: Estimated total spend by Tourism Area

| | NET | Denarau | Coral Coast | Nadi | Mamanuca | Yasawa | Suva | Pacific Harbour/ Beqa/Kadavu | Lautoka | Vanua Levu | Suncoast | Outer Islands/ Unspecified |
|--------------------------------|------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|---------------------|------------------------------|---------------------|---------------------|---------------------|----------------------------|
| Total package and pre-paid | \$1,086,408,850 | \$241,053,067 | \$197,645,777 | \$176,665,065 | \$188,869,506 | \$83,668,433 | \$34,322,739 | \$44,107,898 | \$32,536,675 | \$31,523,101 | \$12,885,443 | \$43,131,147 |
| Additional accommodation | \$36,972,349 | \$6,852,801 | \$5,029,739 | \$6,630,848 | \$3,678,153 | \$2,284,388 | \$4,034,680 | \$1,332,568 | \$1,111,241 | \$1,473,267 | \$110,039 | \$4,434,626 |
| Additional food and drinks | \$140,559,776 | \$44,728,847 | \$36,740,957 | \$12,323,659 | \$24,517,619 | \$6,097,904 | \$3,099,774 | \$3,846,661 | \$3,762,353 | \$2,478,954 | \$1,125,929 | \$1,837,119 |
| Additional expenditure | \$73,394,048 | \$14,836,747 | \$18,292,556 | \$9,858,041 | \$11,610,121 | \$3,552,195 | \$3,485,301 | \$1,461,919 | \$2,529,642 | \$1,174,707 | \$399,002 | \$6,193,817 |
| Total hotel expenditure | \$1,337,335,024 | \$307,471,461 | \$257,709,029 | \$205,477,613 | \$228,675,398 | \$95,602,920 | \$44,942,493 | \$50,749,047 | \$39,939,912 | \$36,650,028 | \$14,520,414 | \$55,596,709 |
| Transfers | \$11,866,834 | \$1,279,300 | \$1,275,902 | \$2,480,928 | \$1,716,755 | \$1,273,654 | \$1,271,867 | \$362,760 | \$445,722 | \$632,108 | \$113,304 | \$1,014,533 |
| Non-hotel F&B | \$65,955,136 | \$22,173,696 | \$5,753,983 | \$11,047,994 | \$5,465,160 | \$2,398,372 | \$6,270,475 | \$1,861,869 | \$2,602,042 | \$1,284,835 | \$1,175,363 | \$5,921,348 |
| Retail | \$106,006,125 | \$25,298,760 | \$16,015,507 | \$20,898,262 | \$9,770,415 | \$3,832,600 | \$10,898,665 | \$2,361,692 | \$3,679,046 | \$3,699,973 | \$383,788 | \$9,167,416 |
| Activities | \$21,671,322 | \$5,191,345 | \$3,516,036 | \$3,218,808 | \$3,432,632 | \$1,424,937 | \$1,148,511 | \$1,073,272 | \$282,905 | \$860,853 | \$380,233 | \$1,141,790 |
| Tours | \$8,689,491 | \$2,429,624 | \$3,239,568 | \$1,105,034 | \$645,123 | \$370,894 | \$86,565 | \$373,240 | \$176,509 | \$35,189 | \$88,395 | \$139,349 |
| Cruises | \$6,753,970 | \$3,778,537 | \$1,333,334 | \$631,463 | \$396,485 | \$51,144 | \$76,531 | \$95,743 | \$197,187 | \$25,071 | \$20,056 | \$148,418 |
| Rental cars | \$6,478,812 | \$664,276 | \$1,471,812 | \$966,931 | \$427,059 | \$235,945 | \$760,457 | \$515,400 | \$313,015 | \$99,687 | \$184,504 | \$839,724 |
| Public transport | \$13,751,542 | \$2,733,018 | \$1,911,314 | \$2,565,320 | \$1,058,504 | \$522,788 | \$2,168,218 | \$339,221 | \$375,901 | \$482,812 | \$62,150 | \$1,532,296 |
| TOTAL EXPENDITURE | \$1,578,508,256 | \$371,020,017 | \$292,226,484 | \$248,392,352 | \$251,587,532 | \$105,713,254 | \$67,623,784 | \$57,732,243 | \$48,012,237 | \$43,770,558 | \$16,928,210 | \$75,501,584 |



Table 25: Estimated total spend by country and region of residence

| | NET | Australia | New Zealand | Pacific Islands | USA | Continental Europe | United Kingdom | Canada | China | Japan | Other areas |
|--------------------------------|------------------------|----------------------|----------------------|---------------------|----------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Total package and pre-paid | \$1,086,408,850 | \$614,735,005 | \$172,566,686 | \$23,262,721 | \$88,084,865 | \$62,514,496 | \$63,745,886 | \$5,687,220 | \$24,436,630 | \$11,533,531 | \$19,841,811 |
| Additional accommodation | \$36,972,349 | \$16,047,013 | \$4,948,967 | \$6,356,124 | \$1,187,546 | \$3,134,876 | \$1,468,918 | \$515,294 | \$173,782 | \$108,527 | \$3,031,302 |
| Additional food and drinks | \$140,559,776 | \$85,220,922 | \$27,385,083 | \$4,275,398 | \$6,414,702 | \$5,147,124 | \$5,149,220 | \$694,292 | \$2,848,258 | \$516,258 | \$2,908,519 |
| Additional expenditure | \$73,394,048 | \$42,942,143 | \$10,699,699 | \$7,049,115 | \$1,452,895 | \$3,761,552 | \$2,777,180 | \$662,746 | \$877,147 | \$929,409 | \$2,242,162 |
| Total hotel expenditure | \$1,337,335,024 | \$758,945,083 | \$215,600,434 | \$40,943,358 | \$97,140,009 | \$74,558,048 | \$73,141,204 | \$7,559,552 | \$28,335,818 | \$13,087,725 | \$28,023,793 |
| Transfers | \$11,866,834 | \$3,899,083 | \$1,840,613 | \$1,140,565 | \$498,510 | \$1,867,949 | \$1,826,860 | \$83,043 | \$196,541 | \$222,754 | \$290,916 |
| Non-hotel F&B | \$65,955,136 | \$30,365,353 | \$13,277,064 | \$9,763,241 | \$2,820,522 | \$1,724,344 | \$2,089,306 | \$1,113,295 | \$2,200,947 | \$1,180,823 | \$1,420,239 |
| Retail | \$106,006,125 | \$39,108,836 | \$14,316,750 | \$29,168,101 | \$6,416,401 | \$2,805,384 | \$2,007,026 | \$855,499 | \$6,384,318 | \$1,347,033 | \$3,596,777 |
| Activities | \$21,671,322 | \$10,093,203 | \$3,528,956 | \$1,557,896 | \$1,278,548 | \$1,726,710 | \$679,864 | \$63,895 | \$1,331,443 | \$134,136 | \$1,276,671 |
| Tours | \$8,689,491 | \$5,991,371 | \$785,399 | \$100,669 | \$569,177 | \$380,307 | \$511,599 | \$123,591 | \$91,684 | \$0 | \$135,693 |
| Cruises | \$6,753,970 | \$4,232,259 | \$1,443,869 | \$25,555 | \$366,515 | \$223,639 | \$200,896 | \$108,396 | \$84,369 | \$62,360 | \$6,114 |
| Rental cars | \$6,478,812 | \$2,858,230 | \$1,113,243 | \$509,265 | \$407,300 | \$383,734 | \$933,703 | \$190,951 | \$71,401 | \$0 | \$10,985 |
| Public transport | \$13,751,542 | \$5,137,370 | \$1,401,358 | \$3,843,074 | \$638,853 | \$615,463 | \$671,782 | \$85,945 | \$436,511 | \$155,502 | \$765,685 |
| TOTAL EXPENDITURE | \$1,578,508,256 | \$860,630,787 | \$253,307,686 | \$87,051,725 | \$110,135,835 | \$84,285,578 | \$82,062,239 | \$10,184,167 | \$39,133,033 | \$16,190,332 | \$35,526,873 |



Table 26: Estimated total spend by main reason for visit

| | NET | Holiday/ vacation | Transit | Business | Conference/ convention | Visiting friends/ relatives | Education/ training | Volunteer | Other |
|--------------------------------|------------------------|------------------------|---------------------|---------------------|---------------------------|-----------------------------------|------------------------|---------------------|--------------------|
| Total package and pre-paid | \$1,086,408,850 | \$983,969,822 | \$7,609,216 | \$25,453,599 | \$16,880,827 | \$21,924,589 | \$9,944,064 | \$18,684,310 | \$1,942,423 |
| Additional accommodation | \$36,972,349 | \$22,771,684 | \$941,119 | \$5,809,088 | \$2,321,922 | \$2,107,357 | \$2,739,215 | \$127,453 | \$154,510 |
| Additional food and drinks | \$140,559,776 | \$132,377,420 | \$531,124 | \$3,965,506 | \$1,448,589 | \$1,006,198 | \$1,105,262 | \$63,854 | \$61,823 |
| Additional expenditure | \$73,394,048 | \$58,499,613 | \$1,937,820 | \$1,885,392 | \$1,442,718 | \$3,769,498 | \$4,152,641 | \$919,516 | \$786,850 |
| Total hotel expenditure | \$1,337,335,024 | \$1,197,618,539 | \$11,019,279 | \$37,113,585 | \$22,094,056 | \$28,807,642 | \$17,941,183 | \$19,795,134 | \$2,945,606 |
| Transfers | \$11,866,834 | \$7,995,545 | \$157,095 | \$1,234,562 | \$387,122 | \$1,416,202 | \$422,995 | \$187,894 | \$65,418 |
| Non-hotel F&B | \$65,955,136 | \$47,104,887 | \$1,076,364 | \$3,543,517 | \$2,025,491 | \$6,616,312 | \$4,605,375 | \$765,756 | \$217,435 |
| Retail | \$106,006,125 | \$70,609,209 | \$4,157,754 | \$6,454,339 | \$8,844,129 | \$8,772,813 | \$6,564,915 | \$322,092 | \$280,875 |
| Activities | \$21,671,322 | \$17,713,823 | \$34,785 | \$223,173 | \$111,587 | \$1,740,258 | \$1,082,974 | \$732,682 | \$32,039 |
| Tours | \$8,689,491 | \$8,415,055 | \$54,924 | \$91,173 | \$86,963 | \$36,616 | \$1,098 | \$3,662 | \$0 |
| Cruises | \$6,753,970 | \$6,529,785 | \$23,695 | \$131,552 | \$12,277 | \$38,858 | \$0 | \$17,802 | \$0 |
| Rental cars | \$6,478,812 | \$4,800,638 | \$0 | \$621,319 | \$96,117 | \$928,699 | \$0 | \$0 | \$32,039 |
| Public transport | \$13,751,542 | \$7,916,501 | \$415,218 | \$674,587 | \$866,563 | \$1,279,389 | \$2,103,480 | \$429,841 | \$65,963 |
| TOTAL EXPENDITURE | \$1,578,508,256 | \$1,368,703,984 | \$16,939,114 | \$50,087,807 | \$34,524,304 | \$49,636,789 | \$32,722,020 | \$22,254,863 | \$3,639,375 |



Table 27: Estimated total spend by main reason for 'holiday/vacation'

| | NET | Rest and relaxation | Wedding | Honeymoon | Other |
|--------------------------------|------------------------|------------------------|---------------------|----------------------|---------------------|
| Total package and pre-paid | \$983,969,822 | \$770,850,899 | \$65,263,042 | \$87,965,537 | \$59,890,345 |
| Additional accommodation | \$22,771,684 | \$17,414,233 | \$2,265,479 | \$908,122 | \$2,183,850 |
| Additional food and drinks | \$132,377,420 | \$109,506,537 | \$7,432,388 | \$11,389,916 | \$4,048,580 |
| Additional expenditure | \$58,499,613 | \$46,030,308 | \$6,119,062 | \$1,867,732 | \$4,482,511 |
| Total hotel expenditure | \$1,197,618,539 | \$943,801,977 | \$81,079,970 | \$102,131,307 | \$70,605,285 |
| Transfers | \$7,995,545 | \$6,597,549 | \$453,684 | \$262,268 | \$682,045 |
| Non-hotel F&B | \$47,104,887 | \$39,494,576 | \$3,326,611 | \$2,513,854 | \$1,769,846 |
| Retail | \$70,609,209 | \$55,905,187 | \$4,692,746 | \$7,383,952 | \$2,627,324 |
| Activities | \$17,713,823 | \$12,606,114 | \$1,367,844 | \$2,726,371 | \$1,013,494 |
| Tours | \$8,415,055 | \$7,067,826 | \$410,627 | \$416,892 | \$519,710 |
| Cruises | \$6,529,785 | \$5,804,958 | \$255,020 | \$432,838 | \$36,968 |
| Rental cars | \$4,800,638 | \$4,029,058 | \$31,598 | \$123,824 | \$616,158 |
| Public transport | \$7,916,501 | \$6,365,379 | \$666,918 | \$471,233 | \$412,972 |
| TOTAL EXPENDITURE | \$1,368,703,984 | \$1,081,672,624 | \$92,285,018 | \$116,462,538 | \$78,283,804 |

11 DEFINITIONS AND CALCULATIONS

11.1 Abbreviations

- IVS - International Visitor Survey
- FBOS - Fiji Bureau of Statistics
- MITT - Ministry of Industry, Trade and Tourism
- NPS - Net Promoter Score

11.2 International Visitor Survey

An International Visitor Survey (IVS) is an international standard of reporting used to provide findings on the characteristics, behaviour and expenditure of international visitors.

The Fiji IVS does not include:

- Airfare (including Fiji Airways)
- Revenue from airport services (except retail purchases)

11.3 Visitor

A visitor is any person who travels outside his/her usual environment for at least a night but not exceeding a year and do not have a long-term employment contract. This includes those who are transiting to another destination.

11.4 Transit visitors

There are two types of transit visitors:

- Those who change flights in Fiji and do not leave the airport terminal building
- Those who visit Fiji to transit to another destination and leave the airport terminal building. These are included in the data as 'transit'.

11.5 Classification of visitors for main reason of visit

The classification of visitors is self-reported during interviews from which the main reason of visit is derived. IVS uses more categories by purpose of visit when compared to FBOS arrival data therefore, some categories may not be comparable.

11.6 Sample size

The sample size of the 2015 IVS is 4,123 interviews. This sample size gives a confidence level of 1.5% at the 95% confidence interval. Differences are only reported when they are significant at the 95% confidence level or higher. Small base sizes that may make the data unreliable has been noted in the Report.

11.7 Groups in data

The IVS records data for groups rather than individuals, meaning that the 4,123 interviews completed represent 8,658 individuals (average group size of 2.1 people). In cases where this may affect findings, '% responses' have been used. This shows proportion of the total number of responses (weighted) represented by the cell.

This effectively means that data is shown as a single variable eliminating the issue of groups. For example, gender is shown correctly for all visitors allowing for the size of the party.

11.8 Sampling procedure

The sampling uses a 'random probability' approach where a person is selected at random at the Nadi International Airport departure lounge for an interview.

A single person is selected from a group sharing the same expenditure. If more than one person is involved in answering the questionnaire (which is common with travelling couples), the primary person for interview is the one with the last birthday to randomize the respondents.

To ensure a random person is selected, interviewing staff are instructed to commence interviews by each row of seats in the departure lounge as a continuous 'loop' so all seats in the lounge are included. Interviewers will stop and approach the person in every fifth seat, unless they are sharing expenses with the person from the previous interview.

11.9 Expenditure

Calculation of spend


To calculate spend, the following steps are made:

- Spend multiplied by base size for the number of respondents
 - Total spend for data collected
- Total spend divided by group size
 - Per-person spend in data collected
- Total spend for data collected divided by base size for survey
 - Gives a per-person spend for data collected
- Per-person spend multiplied by percentage of visitors in each category
 - Gives the total spend for each category

This process means that data collected is effectively reduced to a per-person average regardless of whether they spent money in the category so it can then be accurately projected for all visitors.

Allocation of spend to Provinces and Tourism Areas

Visitors may spend in more than one Province or Tourism Area. Additionally, they may spend in other areas, for example, the airport duty free area. In this survey, Province and Tourism Area are allocated by the location of paid accommodation. Those that are not in paid accommodation are included in the 'unspecified' category.



This approach means that spend is representative of the visitors to each Province and Tourism Area even though all spend may not have occurred in those areas. Data was used to show the value of visitors to each area rather than spend specifically in each area.

Package spend

Many visitors purchase their travel to Fiji as part of a 'package' and may not know the cost of specific components included in this travel. A travel package typically includes airfare (not part of IVS data), accommodation, transfers and meals etc. Package spend is recorded in the visitor's currency which is then converted to Fijian Dollars for analysis.

Package retention rate

Using data collected, MITT in consultation with stakeholders identified package amounts that are not part of IVS spend.

The model used for package spend is:

- 27% removed for commissions and charges not spent in Fiji i.e. travel agent commissions, wholesaler fees etc.
- 42% removed for airfare

This means that for every package dollar spent, thirty-one percent (31%) is retained in Fiji. This figure is similar to other IVS analysis such as Australia that has a retention rate of thirty percent (30%).

In this report, the retention rate has been used for all spend identified as coming from a travel agent.

11.10 Limitations of this research

Limitations to the 2015 IVS include:

- Interviews are only conducted at the Nadi International Airport
 - Cruise, yachts and Nausori Airport are not included
- Issues with missing data
 - The 2015 IVS was completed using two data collection methodologies i.e. on paper and later entered into an electronic form and also through electronic tablets. As a result, there were cases of missing data that lead to anomalies, hence tables produced in this report are based on the data collected.
 - Data has been cleaned to remove outliers and obvious data collection errors. Unlike data collected via electronic tablets where obvious input errors can be addressed, missing data from paper based surveys cannot be rectified.
- Confusion with transit passengers
 - There is a degree of confusion between transit passengers who do not leave the airport and those that stay in Fiji to wait for a flight scheduled a few days later. This issue will be rectified in future surveys.
- Not all spend can be classified to a specific Province or Tourism Area
 - Spend is allocated to a Province or Tourism Area based on the location of the paid accommodation. The spend details of visitors that did not specify their area of accommodation has been included under the 'unspecified' category of the expenditure section.

12 ARRIVAL DATA

There were a total of 754,835 visitor arrivals in the year 2015 which is a 9% increase over the previous year. The table below and chart on the next page shows a clear seasonal pattern with fewer arrivals between January to May and more between June to October.

Table 28: 2015 Visitor arrivals by country/region of residence

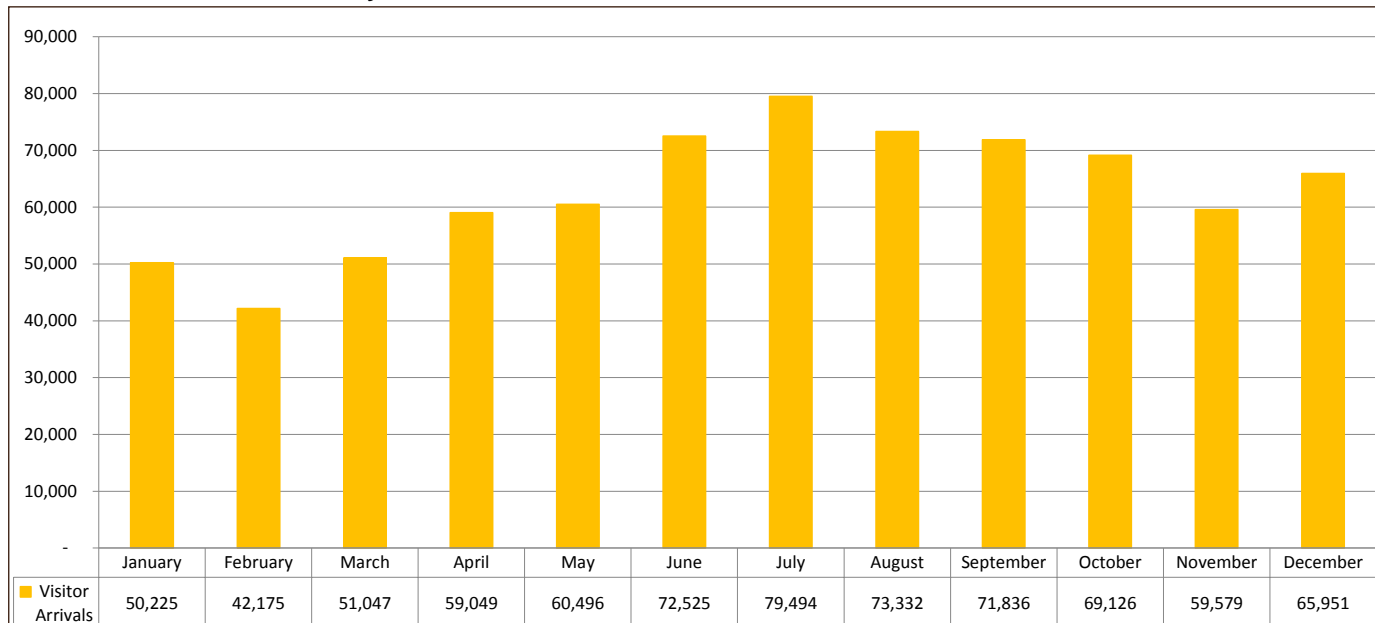
| Month | Australia | New Zealand | USA | Canada | United Kingdom | Continental Europe | Japan | South Korea | China | India | Hong Kong | Rest of Asia | Pacific Islands | Others | Total |
|--------------|----------------|----------------|---------------|---------------|----------------|--------------------|--------------|--------------|---------------|--------------|------------|---------------|-----------------|--------------|----------------|
| January | 25,645 | 6,695 | 3,847 | 847 | 1,340 | 2,787 | 402 | 561 | 2,383 | 318 | 46 | 852 | 3,865 | 637 | 50,225 |
| February | 16,838 | 4,257 | 4,583 | 930 | 1,425 | 2,343 | 474 | 371 | 4,460 | 357 | 44 | 1,028 | 4,607 | 458 | 42,175 |
| March | 25,069 | 5,906 | 5,511 | 1,131 | 1,771 | 2,671 | 586 | 850 | 2,553 | 316 | 30 | 703 | 3,435 | 515 | 51,047 |
| April | 30,077 | 9,721 | 5,092 | 939 | 1,394 | 2,761 | 492 | 474 | 2,773 | 226 | 44 | 910 | 3,691 | 455 | 59,049 |
| May | 30,303 | 10,467 | 5,610 | 1,029 | 1,333 | 2,382 | 399 | 502 | 3,326 | 336 | 66 | 725 | 3,592 | 426 | 60,496 |
| June | 35,695 | 14,719 | 8,063 | 712 | 1,273 | 2,389 | 501 | 496 | 3,094 | 259 | 51 | 614 | 4,255 | 404 | 72,525 |
| July | 34,424 | 21,105 | 7,552 | 1,381 | 1,532 | 2,408 | 555 | 520 | 3,511 | 190 | 77 | 878 | 4,849 | 512 | 79,494 |
| August | 33,154 | 17,952 | 5,508 | 1,069 | 1,389 | 3,062 | 754 | 327 | 4,167 | 277 | 31 | 969 | 4,093 | 580 | 73,332 |
| September | 36,913 | 15,559 | 4,739 | 668 | 1,030 | 2,096 | 665 | 538 | 4,063 | 180 | 35 | 1,083 | 3,823 | 444 | 71,836 |
| October | 35,186 | 12,953 | 6,071 | 782 | 1,246 | 2,917 | 474 | 637 | 3,458 | 240 | 86 | 891 | 3,783 | 402 | 69,126 |
| November | 29,109 | 9,354 | 5,619 | 1,084 | 1,298 | 2,734 | 411 | 781 | 3,136 | 243 | 58 | 916 | 4,421 | 415 | 59,579 |
| December | 34,860 | 9,849 | 5,636 | 1,137 | 1,685 | 2,645 | 379 | 643 | 3,250 | 410 | 90 | 802 | 4,156 | 409 | 65,951 |
| Total | 367,273 | 138,537 | 67,831 | 11,709 | 16,716 | 31,195 | 6,092 | 6,700 | 40,174 | 3,352 | 658 | 10,371 | 48,570 | 5,657 | 754,835 |

Source: FBOS





Chart 87: 2015 Visitor arrivals by month





13 QUESTIONNAIRE

INTRODUCTION: Bula. My name is _____ and I'm from the Department of Tourism. We're interviewing a variety of visitors to find out their opinions of Fiji as a place for people to visit. We're doing this so we can improve our services to visitors. Do you have time to answer a few questions?
[FIRST SET THE INTERVIEW START DATE ONCE INTERVIEW HAS STARTED]

S1. Firstly, can I confirm that you are not a Fiji resident?

Yes (TERMINATE)

No

S2. Have you stayed in Fiji for more than 12 months?

Yes (TERMINATE)

No

S3. Have you finished all your shopping in the airport today including any duty free shopping?

Yes

No (TERMINATE)

IF GROUP / COUPLE INTERVIEW PERSON WITH LAST BIRTHDAY

Q1. Are you a visitor leaving Fiji or a passenger in transit to another destination?

Visitor leaving Fiji

Transit passenger

Q2. What date did you arrive in Fiji:

/ / 2015

Q4. How many nights did you spend in Fiji?

Q5. Where did you arrive in Fiji?

Nadi airport

Suva (Nausori) airport

By sea

Other (please specify):

Q6. Which airline did you use to travel to Fiji?

Air Pacific / QANTAS

Air New Zealand

Pacific Blue (Virgin)

Korean Air

Air Caledonie

Air Vanuatu

Air Fiji

Air Nauru

Polynesian Airlines

Royal Tongan Airlines

Solomon Airlines

Freedom Air

American Airlines

Canadian Airlines

Air Niugini

Pacific Sun

Other (please specify):

Q7. What was the last country you spent a night in before arriving in Fiji?

Q8. Is that where you began this trip, or was there another country you spent time in before that?

Began trip in that country

Spent time in another country

Q9. What was the previous country where you spent a night?

Q10. In which country are you planning to spend your next night after leaving Fiji?

Q11. Will that be the end of this trip, or are you continuing on after that country?

End of the trip

Continuing on to another country

Q12. What country do you plan to go to after that?

[INTRO] I'd like to ask a few questions about your reasons for visiting Fiji.

Q13. What is your main reason for coming to Fiji on this trip?

Holiday/vacation

Business

Conference/convention

Visit friends/relatives

Education/training

Transit to other Pacific Island

Other (please specify):

Q14. Which one of this best describes your main reason for visiting Fiji for your holiday or vacation?

Rest and relaxation

Honeymoon

Scuba diving

Wedding

Fiji culture

Shopping

Golf

Wedding anniversary

Surfing

Other (please specify):

Q15. Are you backpacking?

Yes

No

Q16. Is Fiji the main place you are visiting on this trip?

Yes

No

Don't know

INTRO: I would like to ask some questions about your travelling arrangements and who you are travelling with.

Q17. Looking at this list, what best describes the group you are travelling with on this holiday?

Couple/partners/husband & wife

Couple with child/children

One parent with child/children

Other family (brothers/sisters/etc.)

Friends

Business associates

Other (please specify):

Q18. How did you make your accommodation booking for this trip?

TRAVEL AGENT

By phone, fax, or in person

By email

By website

AIRLINE

By phone, fax, or in person

By email

By website

DIRECT WITH HOTEL / MOTEL

By phone, fax, or in person

By email

By website

HOTEL BOOKING SERVICE

By phone, fax, or in person

By email

By website

THROUGH FRIENDS / RELATIVES IN FIJI

NO BOOKING MADE

OTHER (please specify):

Q19. Where did you get your information about Fiji before you left home?

Travel agent

Travel books/guides/brochures

Previous visit

Friends/relatives who have visited

Newspapers/magazines/TV

Airlines

Friends/relatives in Fiji

Tourism Fiji

Internet

Business associates/workplace

School

Did not get any information [excl.]

Other (please specify):

Q20. Which of these would you say was your MAIN source of information?

Travel agent

Travel books/guides/brochures

Previous visit

Friends/relatives who have visited

Newspapers/magazines/TV

Airlines

Friends/relatives in Fiji

Tourism Fiji

Internet

Business associates/workplace

School

Did not get any information

Other

Q21. Thinking about your costs for this trip that is the money you've spent on food, accommodation and shopping—are you sharing these costs with anyone else? For example, your partner, children, friends or others

Sharing with others

Self only

Q22. Including yourself, how many people are there in your group sharing the same costs?

Q24. Was your visit to Fiji paid or part paid as a 'package'?

Package/pre-paid/part pre-paid

Paid in Fiji

Q24a. Does this package include visiting any other countries besides Fiji?

Yes

No

Q24b. How many nights does the total package cover, including your stay in Fiji and other countries?

Q25a. In your own currency how much did you pay for your package?

Q25b. What currency is this payment in?

Q26. What did your travel package include?

International airfare

Domestic Fiji airfare

Transfers

Accommodation

Meals

Food and beverages

Activities

Rental cars

Other (please specify):

Q27. Thinking of your accommodation in Fiji how many different places have you stayed in?

NOTE: STAYING IN THE SAME TRANSFER HOTEL TWICE CAN BE ANSWERED AS ONE LOCATION

Q29. How did you travel from where you arrived in Fiji to [FIRST HOTEL]

How did you travel from [FIRST / SECOND HOTEL] to [NEXT HOTEL]

Taxi

Public bus

Tour bus/coach

Hotel transfer/courtesy bus

Private Car

Hire/Rental Car

Air

Boat

Other (specify):

Q30. Was this transfer...

Pre-paid or package

Paid in Fiji

No cost

Q31. How much did this transfer cost? \$Fiji

Q32. How many nights did you stay at [NAME]?

Q33. How many rooms did you use at [NAME]?

Q34. How much did you spend at [NAME] on ...

Did you spend any money in addition to the amount prepaid on...?

Accommodation (room)

Food and drinks

Any additional expenditure

No additional expenditure

Q35. Did you spend any money on food or drinks outside the places you stayed?

Yes

No

Q36. What do you estimate you spent on food and drinks outside places you stayed?

Q37. Did you give any gifts or cash as a token of appreciation for staying with your friends or relatives?

Yes

No

Q38. What was the value of the gift or cash?

\$Fiji



Q39. [INTRODUCTION] I would like to ask you some questions about your satisfaction with the hotel where you spent the most number of nights.

Thinking of your time with [PIPE NAME FROM Q28 – HOTEL WITH GREATEST NUMBER OF NIGHTS Q32 – DO NOT SHOW FOR THOSE WITH NO PAID ACCOMMODATION] how would you rate the following areas on a 0 to 10 scale where 0=extremely poor and 10=extremely good?

- Courtesy of staff
- Efficiency of staff
- Quality of food
- Cleanliness of rooms
- Accommodation facilities in general
- Value for money

Q40. How did you travel from the [Pipe name of last resort/hotel from Q28] to here (the airport)?

- Taxi
- Public bus
- Tour bus/coach
- Hotel transfer/courtesy bus
- Private Car
- Hire/Rental Car
- Air
- Boat
- Other (specify):

Q41. Was this transfer...

- Pre-paid or package
- Paid in Fiji
- No cost

Q42. How much did this transfer cost?

\$Fiji

Q43. During your stay in Fiji did you or your group sharing expenses use a rental car?

- Yes
- No

Q44. How many rental cars did you use?

Q45. What was the first rental car company you used? What was the next rental car company you used?

- Avis Rent A Car
- Budget Rent A Car
- Carpenters Rental Car
- Central
- Hertz Rent A Car
- Kenns Rentals
- Khans Rental Cars
- National Car Rentals
- Rental Cars Fiji
- Roxy Rentals
- Satellite Rentals
- Sharmas Rental Cars
- Tanoa Rentals
- Thrifty Car Rental
- Coral Coast Rental
- Crusoes Rental
- Crown Rentals
- Anytime Rental
- Europ Car
- Aims Rental
- Better Rental
- Rosie
- South Pacific Rental
- Sunshine Rental

- Micheals Rental
- Westside Motorcycle
- Ranjith Rentals
- Quality Rentals
- Johnnys Rentals
- Singhs Rentals
- Power Rentals
- True Blue
- Melini Rentals
- Shiba Rentals
- Golden Rental
- Pacific Value View
- Don't know
- Other (please specify):

Q46. How many days did you hire this car?

Q47. Was this rental car...

- Pre-paid or package
- Paid in Fiji

Q48. How much did this rental car cost? \$Fiji

Cost already recorded elsewhere in survey

Q49. Apart from the transfers we have already asked about, did you use public transport including taxies while in Fiji?

- Yes
- No

Q50. Did you travel by bus, minibus, or taxi?

- Bus
- Minibus
- Taxi

Q51. In total how much do you estimate that you and your party sharing expenses spent on public transport? \$Fiji

Q52. This next section is about activities. Can you tell me which of these activities you and your group sharing the same costs participated in? And what was the cost of this activity? Was it pre-paid, or paid for in Fiji? (Select "PP" if pre-paid. Record cost if known even if pre-paid)

BEACH ACTIVITIES

- Beach volleyball
- Beach walking
- Laying on beach

SALT WATER ACTIVITIES

- Swimming
- Scuba Diving
- Snorkelling
- Surfing
- Sailing/Yachting
- Jet boat
- Boat ride
- Canoeing/kayaking
- Jet ski
- Wind surfing
- Water skiing
- Banana boat
- Parasailing
- Deep/big game fishing
- Other fishing
- Reef walking
- Coral viewing
- Dolphin watching
- Fish feeding



FRESH WATER ACTIVITIES

- Swimming
- Jet boat
- Rafting/Bilibili
- Canoeing/kayaking
- Boat ride
- Fishing
- Pool games
- Laying on poolside

SPORTS

- Bike riding/cycling
- Bowls
- Bushwalking/hiking
- Football/rugby
- Golf
- Gym
- Horse riding
- Motor bike riding
- Running/jogging
- Squash
- Tennis
- Volleyball
- Sky diving
- Pool/billiards
- Walking

CULTURAL ACTIVITIES

- Kava drinking/ceremony
- Museum visit
- Meke
- Firewalking
- Cultural centre/Fort, etc.
- Village visit/tour
- Weaving
- Choir/concert
- Church service

OTHER ACTIVITIES

- Babysitting
- Bird watching
- Cinema
- Dancing/night club
- Crab race/frog race
- Massage/spa
- Manicure/facial
- Hair braiding
- Reading
- Shopping

OTHER

Q53. This next section is about travelling in Fiji. Firstly I am going to ask you about organised tours by road transport or where the major part was by road.

Did you take part in an organised tour using road transport?

- Yes
- No

Q54. How many organised tours did you take?

Q55. Thinking of the first tour you took did you pay for this in Fiji or pre-pay?

Thinking of the next tour you took did you pay for this in Fiji or pre-pay?

- Paid in Fiji
- Prepaid

Q56. What was the cost of this tour excluding any shopping?

- \$FJ
- Cost already recorded elsewhere in survey

Q57. What type of tour was it?

- Shopping
- Village/cultural
- Sightseeing /scenic
- Other (specify):

Q58. What area was the tour?

- Around the island
- Nadi
- Lautoka
- Coral Coast
- Suva
- Other (Please specify):

Q59. How long was the tour?

- ½ day or less
- Full day
- 2 days or more

Q60. Which company operated the tour?

- Rosie Tours
- Sunset Tours
- Coral Sun Tours
- Feejee Experience
- Other (please specify):

INTRO: This next section is about organised cruises and other travel on sea and rivers.

Q61. Did you or your group sharing expenses take any organised cruises?

- Yes
- No

Q62. How many cruises did you take?

Q63. Thinking of the first cruise you took did you pay for this in Fiji or pre-pay?

Thinking of the next cruise you took did you pay for this in Fiji or pre-pay?

- Paid in Fiji
- Prepaid

Q64. What was the cost of this cruise excluding any shopping?

- \$FJ
- Cost already recorded elsewhere in survey

Q65. Where did you depart from?

- Nadi/Denarau
- Lautoka
- Coral Coast
- Pacific Harbour/Deuba area
- Suva
- Other (Please specify):

Q66. What area was the cruise in?

- Mamanuca
- Yasawa
- Outer Islands
- River in Viti Levu
- Other (Please specify):

Q67. How long was the cruise?

- Less than ½ day
- ½ day
- Full day
- 2 days or more

Q68. Which company operated the cruise?



Q69. This next section is about air travel

Did you use any domestic air travel in Fiji as a part of this trip?

- Yes
- No
- Already recorded as a transfer

Q70. How many flights did you take?

A return trip counts as one flight.

Q71. Thinking of the first trip by air you took did you pay for this in Fiji or pre-pay?

Thinking of the next trip by air you took did you pay for this in Fiji or pre-pay?

- Paid in Fiji
- Prepaid

Q72. How much did this flight cost you?

\$FJ

Cost already recorded elsewhere in survey

Q73. Where did you travel from?

Q74. Where did you travel to?

Q75. Was this air travel return or one way?

- Return
- One way

Q76. Are there any other trips or travel by road, water or air that you took that we have not asked about in the previous sections or in transfers?

- No other trips
- Road
- Cruise
- Air

Q77. We're interested in what visitors to Fiji buy during their stay here.

Did you or your group sharing expenses buy anything in Fiji, including items at the airport terminal?

- Yes
- No
- Don't know

Q78. Which of these categories did you buy in, and what amount did you spend for each category (in \$FJ)?

- Locally made handcrafts
- Other souvenirs
- Clothing
- Alcohol
- Foodstuffs
- Perfume
- Jewellery
- Cigarettes/tobacco
- Watches/clocks
- Shoes/sandals
- Books/stationery
- Film/processing/printing
- Handbags/wallets
- Cameras & camera equipment
- Materials/textiles
- Paintings
- Suitcases/travel bags
- Toys/games
- Music/videos (CD/DVD/etc.)
- Other:
- Refused

Q79. Overall and taking everything into account can you rate shopping in Fiji on a 0 to 10 scale where 0 = extremely poor and 10 = extremely good for...

- Value for money
- Range of products and brands
- Attitude of shopkeepers
- Presentation of shops

Q80. The next set of questions is about your feelings on Fiji as a destination.

Was this your first visit to Fiji?

- First visit to Fiji
- Previous visits to Fiji
- Don't know

Q81. As this is your first trip to Fiji, how did it compare with your expectations?

- Much less enjoyable than expected
- Less enjoyable than expected
- About what I expected
- More enjoyable than expected
- Much more enjoyable than expected
- Don't know

Q82. How many times have you visited Fiji before?

If respondent does not know exactly, ask for approximate number of times.

Q83. How long ago was your last visit?

- 6 months or less
- 6 months to 1 year
- 1 year to 2 years
- More than 2 years ago
- Don't know

Q84. What were the reasons for your last visit?

- Holiday
- Business
- Conference/convention
- Visiting friends or relatives
- Education/training
- Transit to other Pacific Islands
- Don't know/can't remember
- Other (please specify):

Q85. Can you tell me what were your most favourable impressions of Fiji?

- The people
- The climate/weather
- The scenery/nature
- Relaxing/peaceful
- Hospitality
- The beaches
- Clear/beautiful water
- The islands
- Good food
- Snorkelling
- Culture/craft
- Service at hotel/staff
- Accommodation at hotel/resort
- Activities
- Coral reefs
- Good value for money
- Shopping
- Fiji time
- Scuba diving
- The way of life
- Clean environment/beaches/coast
- Villages

Everything
 Cruise
 Well located/accessible/close to home
 Music/singing
 Safe
 Level of development
 Kava
 Transport good/easy/cheap
 Other
 Good for kids/family
 Swimming
 Facilities at hotel/resort
 Other (please specify):

Q86. What were your more unfavourable impressions of Fiji during your visit?

Nothing
 Shopkeepers/traders
 Too expensive
 Dirty/untidy/pollution
 Insects & bugs
 Bad roads
 The climate/weather
 Quality of food
 Service at hotel
 Harassment on street to buy
 Other
 Crime/feel unsafe
 Other (please specify):

Q87. On a 0 to 10 scale where 0=very unlikely and 10=very likely, how likely are you to recommend Fiji as a place to visit to your family or friends?

Q88. Finally, I need to record some information about yourself so we can make sure that we have a good cross-section of travellers. Which of these countries or regions is your place of residence?

AUSTRALIA

ACT & surrounds
 NSW – Sydney area
 NSW – Other
 VIC – Melbourne area
 VIC – Other
 QLD – Brisbane area
 QLD – Gold Coast area
 QLD – Other
 TAS
 NT
 SA
 WA

NEW ZEALAND

North Island
 South Island

USA

West
 Midwest
 Northeast
 South
 Other territories

CANADA

Cordillera
 Interior Plains
 Northern region (Arctic/Inuit)
 Canadian Shield
 St Lawrence Lowland
 Appalachian Highland/Atlantic

OTHER AMERICA

Mexico

Other North/Central America

South America

AFRICA

North Africa
 West Africa
 Central Africa
 Horn of Africa
 East Africa
 Southern Africa

PACIFIC/OCEANIA

Cook Islands
 FSM
 French Polynesia
 Kiribati
 New Caledonia
 Niue
 Palau
 PNG
 Samoa
 American Samoa
 Solomon Islands
 Tonga
 Tuvalu
 Vanuatu
 Wallis & Futuna
 Other Pacific

JAPAN

Kanto
 Kinki
 Chubu
 Other Japan

OTHER ASIA

Hong Kong
 China (mainland or other)
 South Korea
 Indonesia
 India
 Pakistan
 Other Asia

EUROPE

United Kingdom
 France
 Germany
 Greece
 Italy
 Spain
 Russia
 Finland
 Norway
 Sweden
 Other Europe

OTHER

Rest of the world

Q89. What is your residential postcode or zip code?

Q90. Thinking of [yourself/yourself and the group you are sharing spending with] can you tell me [your gender/their genders] and which of these age groups you fall into?

Age Ranges:
 Under 13 years
 13-19 years
 20-29 years
 30-39 years
 40-49 years
 50-59 years
 60 years and over
 Refused



Q92. Just for our checking purposes, can I please have your first name and email address? This information will be used only for checking the information collected during this interview, and will never be sold or used for any marketing purposes.

Name:

Email address:

Refused

Q94. Flight number:

Not at airport

Thank you for your time today, vinaka!

Q93. Interviewer name:

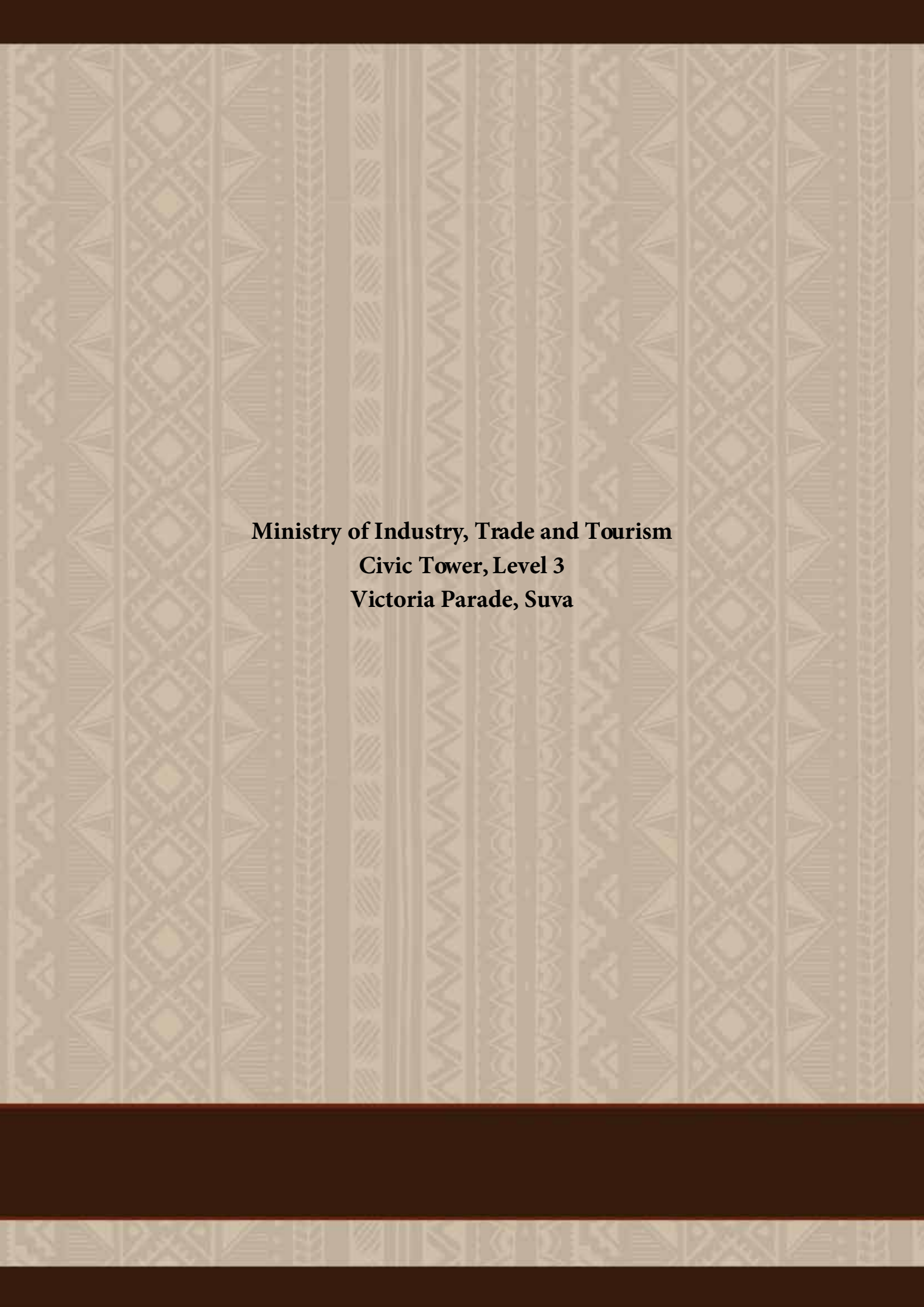
Q95. On-site or data entry

Onsite

Data entry

Q96. Date of interview

/ / 2015



**Ministry of Industry, Trade and Tourism
Civic Tower, Level 3
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