



Australian Aid



Domestic Tourism in Fiji

Insights from local travelers for
post-COVID & beyond

September 2021

Market Development Facility (MDF)

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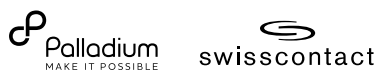
We connect individuals, businesses, governments and NGOs with each other, and with markets at home and abroad. This enhances investment and coordination and allows partnerships to flourish, strengthening inclusive economic growth.

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Front cover photo credits:

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Acknowledgements

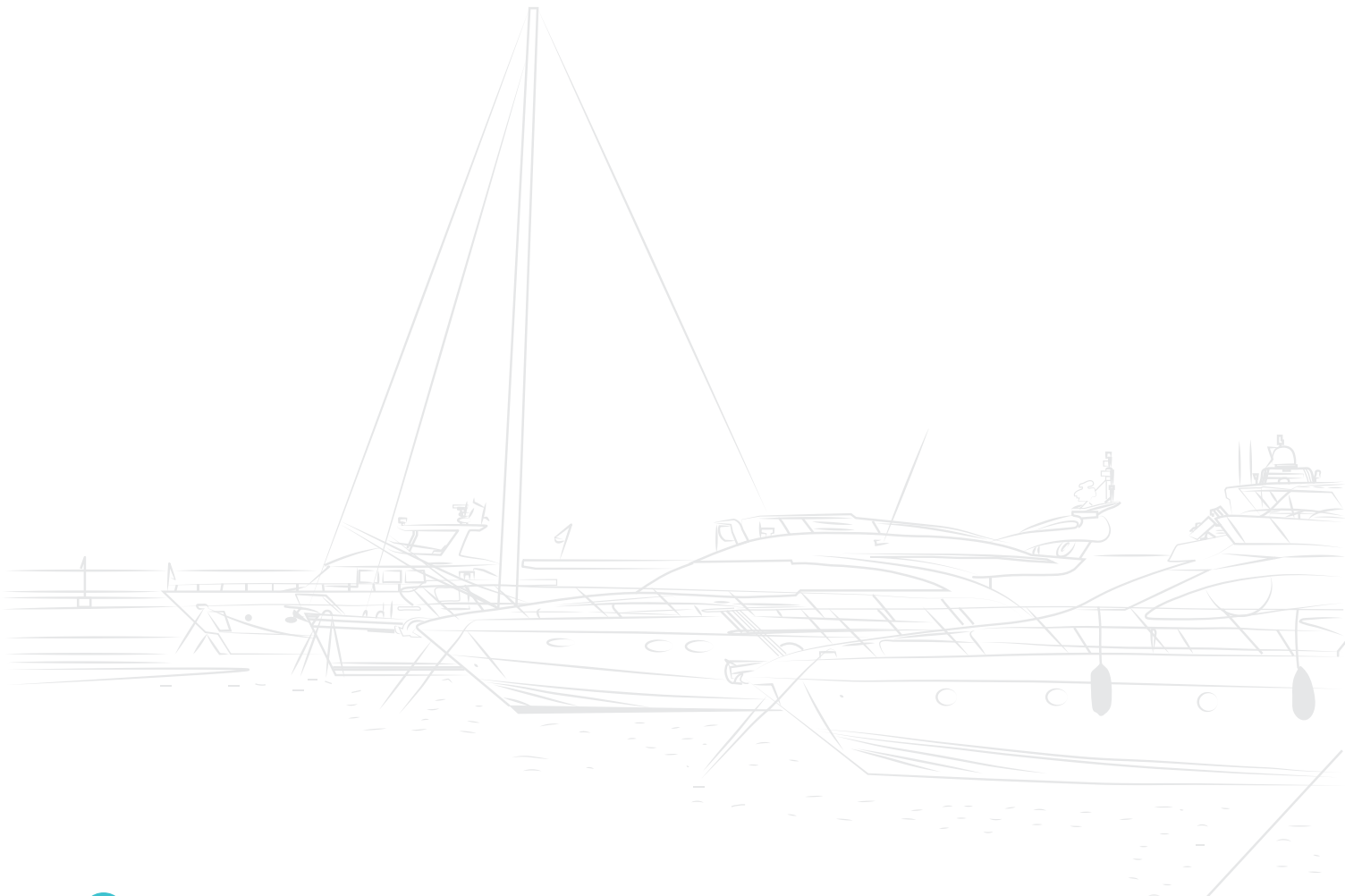
This report has been produced in collaboration with the Fiji Hotel Tourism Association, the Ministry of Commerce, Trade, Tourism & Transport, and Tourism Fiji.

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Executive Summary

Fiji's international tourism arrivals took a nosedive in 2020, due entirely to the global COVID-19 pandemic and the international travel bans that accompanied it.

With the substantial decline in demand, economic activity slowed down resulting in the economy contracting by as much as 16% in 2020. Tourism, the backbone of the economy which generated FJ\$2.06 billion in visitor earnings and catered to over 890,000 visitor arrivals in 2019, declined by over 80% in 2020. Experts have said that the industry will not be returning to 2019 levels until 2024.

This has forced most tourism businesses in Fiji to either reduce their workforce or face closure. As a result, 115,000 jobs have been impacted either through reduced hours, layoffs, or furlough.

While previously international inbound tourism was the focus in Fiji, local tourism players have now had to pivot to domestic tourism as the only means to generate revenue and stay open. With little to no analysis on the domestic tourism market, local operators relied on basic price discounting strategies but lacked the market research to effectively identify and target domestic tourism segments.

This Local Tourism Demand Study is designed to provide a better understanding of local tourism market segments and preferences. The findings of this report are based on results from a survey of more than 10,000 local travelers, and additional focus groups including face to face interviews. It is envisaged that this information will not only help tourism stakeholders to better target domestic tourism post COVID-19 but also allow for the updating of existing domestic tourism strategies by both Government and the private sector for when international tourism eventually resumes.

The findings of the study will assist the industry to better understand different local tourism segments, as well as the spending patterns and preferences at different tourism destinations in Fiji.

The key findings of the report are summarized below:



1 Outside of the mainstream destinations, the top three destinations sought after by local tourists are Savusavu, Taveuni & the Mamanucas Islands.



2 There is a lack of creativity in the development of new holiday packages for the local tourism market.



3 Fully integrated destination packages inclusive of air/sea travel, local transfers and events would increase inter-regional travel and spend.



4 Local tourists are looking for unique destination activities and experiences outside of the hotels & resorts.

It is hoped that the findings and recommendations of this report will assist and inform tourism stakeholders in the immediate term, and shape future domestic tourism strategies in Fiji.

LOCAL TOURISM SNAPSHOT



Local Tourists

Typically travel with their families and stick to Viti Levu's top tourist destinations, whether to kick back and relax or enjoy the activities Fiji has on offer.

Typically Stay
2
nights

Often Take Holiday
3-4 times
a year

Friends & Family

56%

Usually Stay at

Paid Accommodation

44%



Main Holiday Times

Long Weekends
79%

Christmas Holidays
55%

School Holidays
50%



Top Yielding Segments

Expats

Premium Leisure

Adventure

Couples



Key Sources of Holiday Information

Social Media
52%

Word of Mouth
45%

Hotel Websites
31%



Average total spend for 2 nights: **\$985**

Accommodation (incl. Breakfast)
\$348 (35%)

Activities
\$176 (18%)

F&B (Lunch/Dinner)
\$330 (34%)

Transport
\$131 (13%)

Typical Accommodation Spend:
\$150-200/night

Most Popular Activities

- Packaged day cruises **67%**
- Water-based activities **57%**
Diving, fishing, dolphin watching
- Music & food festivals **51%**
- Land-based activities **49%**
Hiking, historical site
- Adventure **49%**
rafting, off-roading, sky diving

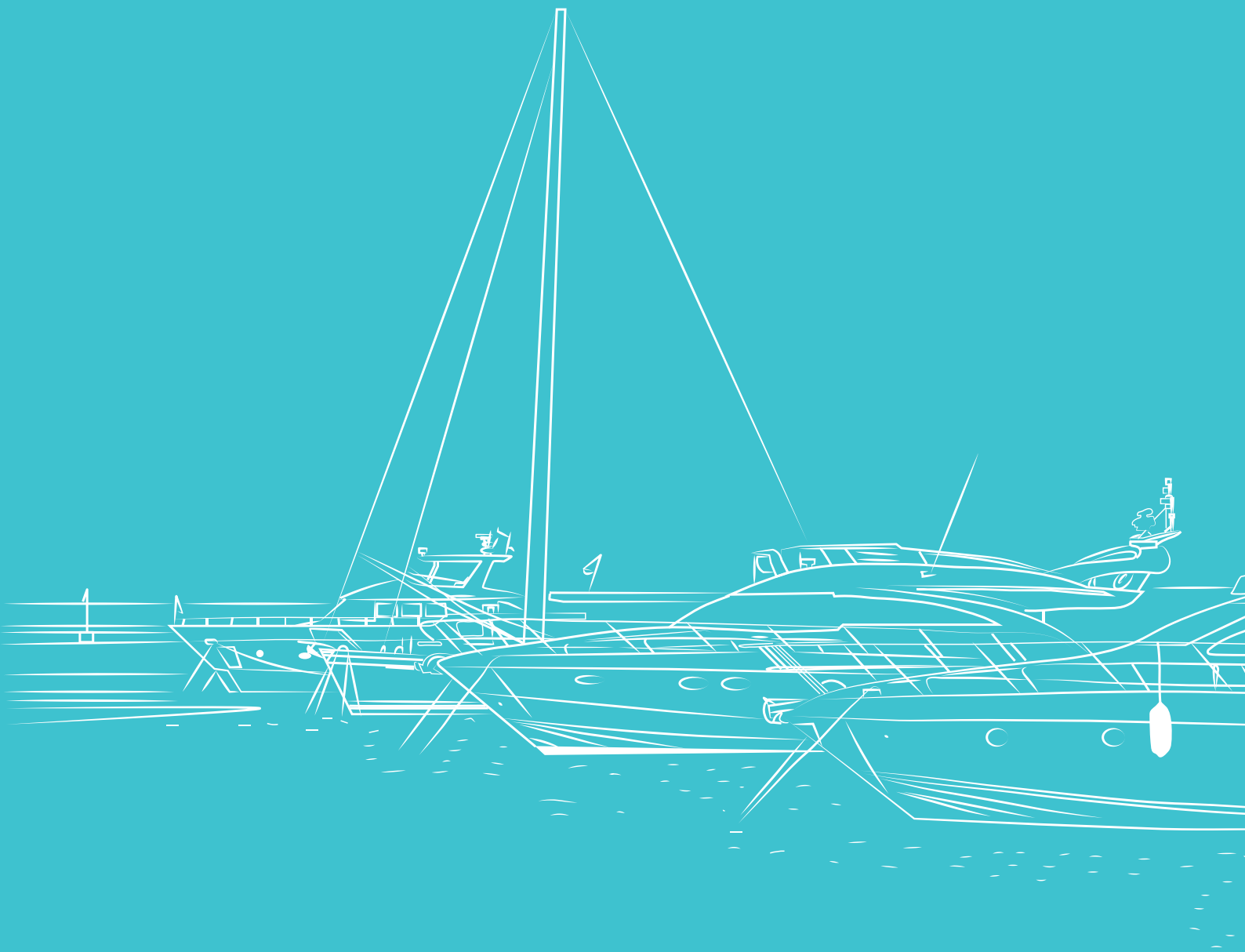
Most Visited Holiday Destinations

- 1 Nadi
- 2 Coral Coast
- 3 Suva

Most Sought After Niche Destinations

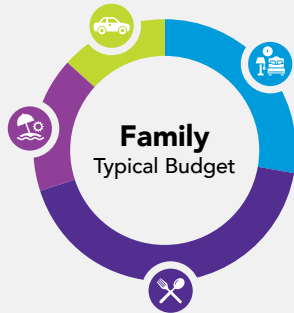
- 1 Savusavu
- 2 Mamanucas & Yasawas
- 3 Taveuni

Traveler Profiles

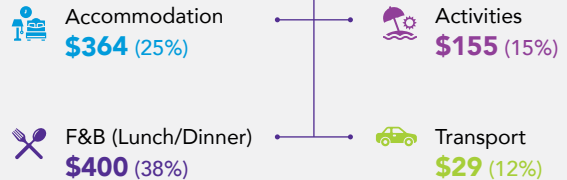


Family Travelers

Family travelers are the largest local tourism segment in the country and typically travel with children and extended family when taking holidays in Fiji, which makes deals on extra rooms a good way for hotels to appeal to these larger family groups. Families often prefer holiday destinations in Viti Levu that have children's activities and dining options.



Families typically have a budget of **\$1,048** for a two-night holiday



Typically Stay
2 nights

Often Take Holiday
3-4 times a year

Main Holiday Time
Long weekends

Typical Annual Spend
\$4,192

Preferred Accommodation

★★★ 5-star hotels
36%

Budget
over **\$250**

★★ 4-star hotels
39%

Budget
\$200

Self-contained apartments
18%

Budget
\$150



Families have a big food spend, but **many are looking for deals when it comes to their kids' meals.**

21% of respondents are looking for Kids Eat Free deals.



I like to get local deals that are kid friendly, good value for money, must include breakfast and not to pay adult rates for kids. Portion sizes need to be adequate for the local segment.

Top Family Holiday Destinations

Nadi/Denarau: **54%**

Coral Coast: **27%**

Suva/Pacific Harbor: **10%**

Mamanuca & Yasawa Group: **4%**

Suncoast: **2%**

Top Destinations for Next Holiday

Coral Coast: **26%**

Nadi/Denarau: **21%**

Savusavu: **14%**

Mamanuca & Yasawa Group: **13%**

Taveuni: **9%**

While many hotels and resorts do have **kid-friendly activities**, they could better cater for families with younger children by providing **complementary or paid-for nanny services**. This is seen as more important than add-ons like Wi-Fi.

Mature travelers are an important sub-segment

61% of over 50s travel with family. They also represent a higher yielding segment, who are more likely to spend more on food & beverage, as well as paid-for activities while on holiday. This segment is looking for more rest and relaxation, as well as activities and dining options they can enjoy on their own, as a couple or with their family members.

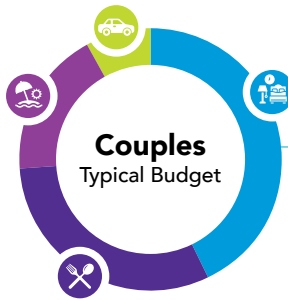
Top Paid Activities

Packaged day cruises
66% | Budget per person **\$70**

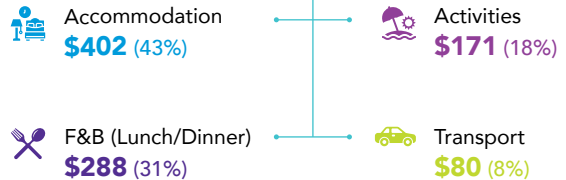
Water based
(e.g. kayaking, snorkeling, scuba diving)
56% | Budget per person **\$26**

Couples

Couples travel in and around Fiji for honeymoons, leisure, and adventure. From the world's most exquisite adults-only resort to outdoor adventure activities, couples like options to tailor-make their holiday experience so it can be as memorable and romantic as possible.



Couples typically have a budget of **\$941** for a two-night holiday



Typically Stay 2 nights	Often Take Holiday 3-4 times a year	Main Holiday Time Long weekends	Typical Annual Spend \$3,764
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Preferred Accommodation

★★★ 5-star hotels
★★★ **40%**
Budget
\$225

★★ 4-star hotels
★★ **40%**
Budget
\$200

Self-contained apartments
13%
Budget
\$150

64% of couples spend up to \$150 on food and beverages per day (excluding breakfast), making them the highest spending segment for in-hotel dining.



We take 2 or 3 trips a year, preferably once at the end of every quarter. We do not mind spending up to \$800 for a 2-night holiday, if the meals are at a decent price. Drinks are expensive at hotels so we would always take our own drinks whenever we travel

Top Destinations for Couples

- Nadi/Denarau: **57%**
- Coral Coast: **22%**
- Suva/Pacific Harbor: **11%**
- Mamanuca & Yasawa Group: **2%**
- Suncoast: **2%**

Top Destinations for Next Holiday

- Coral Coast: **28%**
- Nadi/Denarau: **19%**
- Savusavu: **15%**
- Mamanuca & Yasawa Group: **13%**
- Taveuni: **9%**

Affordable packages to see new regions are popular with couples: **many are interested in deals on cruises as an affordable way to leave Viti Levu and see new regions.**

Top Paid Activities

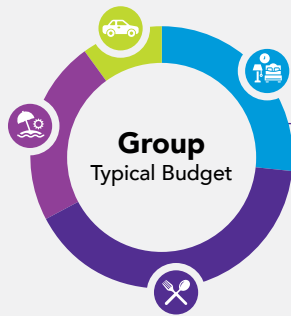
Packaged day cruises
69%
Budget per couple **\$300**

Water based (e.g. kayaking, snorkeling, scuba diving)
58%
Budget per couple **\$48**

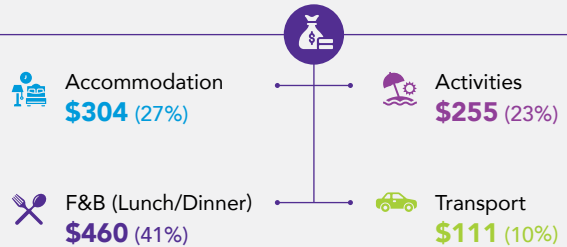
Spa & Massage packages
15%
Budget per couple **\$60**

Group Travelers

Group travelers are typically young (80% are under 40) and have a lower accommodation budget but are the most frequent travelers of all the local tourism market segments, splitting costs with friends so they can travel often and explore Fiji, including regions outside of Viti Levu.



Groups of 5-6 travelers have a combined budget of **\$1,130** for a two-night trip



Typically Stay
2 nights

Often Take Holiday
3-4 times a year

Main Holiday Time
Long weekends

Typical Annual Group Spend
\$4,520

Preferred Accommodation

★★★ 5-star hotels
36%
Budget
\$200

★★ 4-star hotels
38%
Budget
\$150

Self-contained apartments
16%
Budget
\$150



Apart from capitalizing on deals with friends, many groups are motivated to travel to attend **food or music events (60%)** or **family or school reunions (50%)**



My friends and I travel at least 3 times in 2020 and we started when the Love Our Locals campaign began advertising many great deals. It's more affordable in groups – we've done the one-day trips, the 2-nights weekend away, and even stayed at a luxurious, high end resort. There is a lot to do in Fiji – activities and tourism products just have to be packaged smartly and sold at affordable prices

Top Destinations for Groups

Nadi/Denarau: **58%**
Coral Coast: **23%**
Suva/Pacific Harbor: **11%**
Savusavu: **3%**
Mamanuca & Yasawa Group: **2%**

Top Destinations for Next Holiday

Coral Coast: **24%**
Nadi/Denarau: **20%**
Savusavu: **15%**
Mamanuca & Yasawa Group: **13%**
Taveuni: **2%**

Group travelers have **a high level of interest in most activities and a large activity spend** (an average of \$255 over their weekend trips). They have the most interest in packaged day cruises and look for deals as an affordable way to relax with friends while still doing something new.

Top Paid Activities

🚢 **Packaged day cruises**
70% | Budget per person **\$87**

🤿 **Water based** (e.g. kayaking, snorkeling, scuba diving)
62% | Budget per person **\$50**

🚗 **54% of groups** travel using their own vehicle, 27% rent cars, and 14% travel by bus.

📱 Group travelers are highly motivated by seeing other friends travel: **77% get information from social media.**

📢 **14% had used the Love Our Locals campaign**, and booked travel based on the deals they saw and organized their group around the deal.

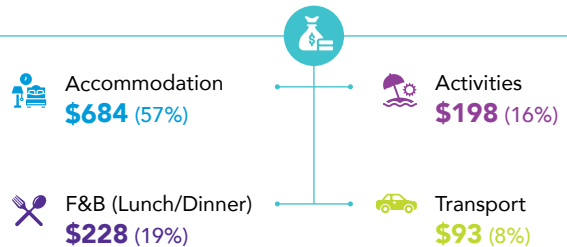
Premium Leisure Travelers



Premium leisure travelers are willing to pay premium rates for local accommodation. This is a small niche group, representing about 3% of the those surveyed, who tend to be over 40 years of age and like to travel as a couple or with their immediate family. These travelers aren't price sensitive, and are most interested in choosing hotel brands where they know they can trust the quality of the room features and in-hotel activities.



Premium travelers typically have a budget of **\$1,203** for a two-night holiday



Typically Stay **5-star** hotels

Often Take Holiday **3-4 times** a year

Main Holiday Time **Long weekend/ public holidays**

Typical Annual Spend **\$4,812**



While these tend to be wealthy individuals, there is also a group that intentionally saves for months to be able to take these luxury holidays.

Preferred Accommodation

★★★ **5-star hotels**
★★★ **50%**
Budget over **\$350**

★★ **4-star hotels**
★★ **24%**
Budget over **\$300**

🏠 **Self-contained apartments**
8%
Budget over **\$300**

Top Premium Holiday Destinations

Nadi/Denarau: **58%**
Coral Coast: **26%**
Suva/Pacific Harbor: **5%**
Mamanuca & Yasawa Group: **5%**
Suncoast: **4%**

Top Destinations for Next Holiday

Coral Coast: **21%**
Nadi/Denarau: **17%**
Mamanuca & Yasawa Group: **16%**
Savusavu: **15%**
Taveuni: **12%**



There is a special segment comprising i-Taukei women over 50 with resources who would travel just to relax. We have the financial resources – just not enough interesting packages to spend on. My friends and I would love to take a cruise, enjoy a few drinks with soothing music on board and watch the sunset. There is not many activities or packages that would interest mature travelers for whom money is not an issue.



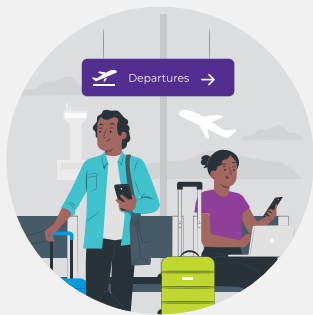
Top hotels on Viti Levu are the most popular for this group, but they're more likely than other locals to travel to other regions. When they do they're often looking for well-designed activity packages – multi-day cruises or hotel deals that include niche activities are the way to capture these high-yielding travelers.

Top Paid Activities

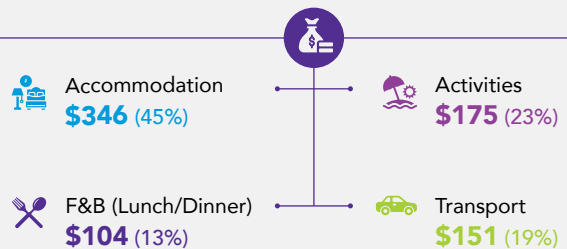
🚢 **Packaged day cruises**
33% | Budget per person **\$125**

Business Travelers

Business travelers who travel a few times a year for meetings and workshops tend to stick to the mainstream tourism regions in Viti Levu. The travelers, and those booking corporate travel in larger companies, look for facilities that have good conference facilities, meeting rooms and high-speed internet.



Business travelers typically have a budget of **\$776** for a two-night trip



Typically Stay
2 nights

Often Take Holiday
3-4 times a year

Typical Annual Spend
\$3,104

Preferred Accommodation

★★★ 5-star hotels
32%
Budget
\$200

★★ 4-star hotels
40%
Budget
\$150

Self-contained apartments
20%
Budget
\$150



Business travelers are comfortable paying **up to \$180** for a day-room for business trips when they arrive early in the morning and have to leave by late afternoon.

Business traveler bookers are looking for deals, such as discounts on additional rooms or nights, whether these are marketed as corporate rates or not.

Top Work Travel Destinations

Nadi/Denarau: **51%**
Coral Coast: **27%**
Suva/Pacific Harbor: **10%**
Savusavu: **4%**
Mamanuca & Yasawa Group: **3%**

Top Destinations for Next Trip

Coral Coast: **20%**
Savusavu: **17%**
Mamanuca & Yasawa Group: **15%**
Nadi/Denarau: **15%**
Taveuni: **12%**

Combining work & pleasure

Travel for work also offers locals an opportunity to experience new regions and enjoy leisure activities away from home, at a reduced cost. **Building family packages** or **addition of short add-on activity packages to corporate visitors** is a good way to capture this segment.



I rarely have time for a holiday as I am so busy with family and my village's communal obligations. I have money to spend but I just don't have the time. So when I have the opportunity to travel for work, I turn it into a mini holiday by staying an extra day to indulge.

Business travelers prefer

Quiet single rooms, in areas with minimal traffic

Room service over restaurant dining

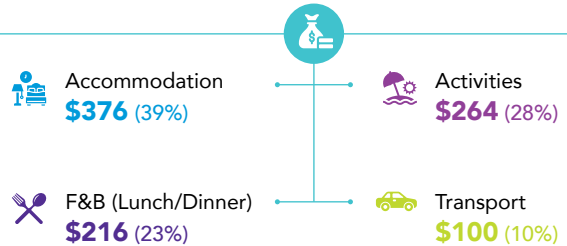
Hotel meeting rooms to be spacious, COVID-safe (e.g. having hand sanitiser available & pre-plated food rather than buffets)

Adventure Travelers

Adventure travelers are a growing tourism segment in Fiji with 49% of people surveyed, interested in adventure activities, such as off-roading, zip-lining, white-water rafting and sky diving. These travelers are typically aged 25-40 years old and are generally fit and love the outdoors. Most do these activities with family & friends.



Adventure travelers typically have a budget of **\$956** for a two-night trip



Typically Stay 2 nights	Often Take Holiday 3-4 times a year	Main Holiday Time Long weekends	Typical Annual Spend \$3,824
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Preferred Accommodation

★★★ 5-star hotels
★★★ **40%**
—
Budget
\$200

★★ 4-star hotels
★★ **38%**
—
Budget
\$150

Self-contained apartments
15%
—
Budget
\$150

Adventure travelers are **more likely to book all-inclusive packages with adventure activities included.**

Often the activities themselves will determine the region and accommodation provider they will choose.

It's harder to convert sales with locals than with international tourists, but the strong interest in the Namosi Marathon & the Eco-Challenge Series both show it's worth tourism operators developing packages for this kind of adventure event.

Top Adventure Locations & Activities

- Nadi/Denarau:** Nadi Zipline & Cave Tour | Sleeping Giant Zipline Fiji | Skydive Fiji | Freefall Fiji
- Coral Coast:** Sigatoka Sand Dunes | Tavuni Hill Fort | Kula Wild Adventure Park | Exploring Sigatoka Valley
- Suva/Pacific Harbor:** White Water Rafting | Jet Ski Safari Adventures | River Tubing | Rivers Fiji
- Mamanuca & Yasawa Group:** Day Trips & Excursions | Diving & Snorkeling | Sawailau Caves | Shark-Feeding

Adventure travelers have a **large activity budget** (an average of \$265 per person), and are interested in most outdoor activities, whether cruises, diving, or hiking.

There's a lot to do in Fiji for adventure tourism – from land-based activities to water-based and even air with activities like sky diving on offer. We locals should be able to afford it and I wouldn't mind paying a decent price for an all-inclusive adventure package.

Top Paid Activities

Zipline **33%**
—
Budget per person
\$30

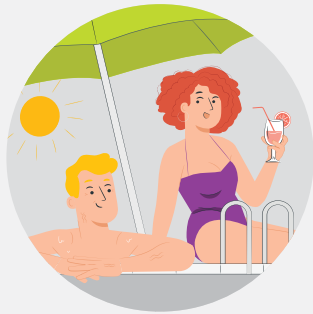
Scuba Diving **13%**
—
Budget per person
\$69

Jet Skiing **13%**
—
Budget per person
\$50

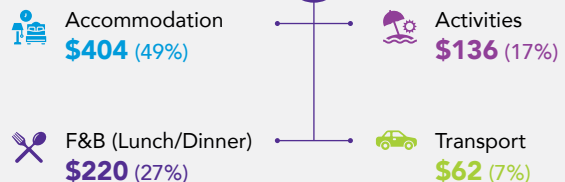
Trekking **13%**
—
Budget per person
\$75

Expatriate Travelers

Expatriate travelers are non-Fiji nationals living and working in Fiji. While some expats have left Fiji during COVID-19, this segment remains important. Although they make up only 3% of the domestic tourism market, expatriates typically have higher disposable income and travel more often, with 1 in 3 saying they would travel at least once a month for a holiday, placing Expats as the highest of all the local tourism segments. They're looking for holidays that get them out of Suva and experiencing authentic Fijian culture and sights, regardless of price.



Expats typically have a budget of **\$822** for a two-night trip



Typically Stay
2 nights

Often Take Holiday
Monthly

Main Holiday Time
Long weekends

Typical Annual Spend
\$9,864

Preferred Accommodation

★★★ 5-star hotels
38%
Budget
\$250

★★ 4-star hotels
44%
Budget
\$200

Self-contained apartments
11%
Budget
\$150



Like all local tourists, most expats holiday in Nadi, Coral Coast & Suva. But they are **more likely to travel to other regions** and have higher levels of interest in travelling to new regions next. All-inclusive packages with add on cultural or adventure activities are the way to capture this segment – and for the right experience money isn't an issue.

Top Expat Holiday Destinations

- Nadi/Denarau: **42%**
- Coral Coast: **33%**
- Suva/Pacific Harbor: **11%**
- Mamanuca & Yasawa Group: **4%**
- Savusavu: **3%**

Top Destinations for Next Holiday

- Savusavu: **23%**
- Taveuni: **16%**
- Nadi/Denarau: **14%**
- Mamanuca & Yasawa Group: **11%**
- Coral Coast: **10%**

Expatriates travel often and are **highly influenced by word of mouth**, particularly recommendations from other expats.

Top Paid Activities

Packaged day cruises
40% | Budget per person **\$90**

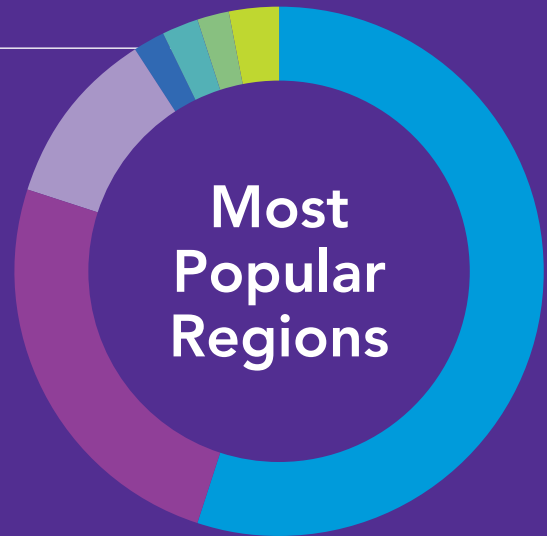
Scuba Diving
30% | Budget per person **\$150**

I usually travel home to Australia at least twice a year but I haven't been able to with international borders closed. So, I have all this money to spend and haven't quite found the ideal package I would buy. I'd happily budget at least \$1,000 for a weekend if the package is right.

REGIONAL PROFILES

Fiji's most popular regions

Currently, most local tourists (91%) are sticking to visiting **Nadi & Denarau**, the **Coral Coast** and **Suva & Pacific Harbour**. Only 9% of local tourists reported that they take holidays to the other tourism regions in Fiji.



- Denarau, Nadi: 55%
- Coral Coast: 25%
- Suva & Pacific Harbour: 11%
- Mamanuca Group: 2%
- Savusavu: 2%
- Suncoast: 2%
- Other: 3%



- Savusavu: 26%
- Mamanuca/Yasawa: 24%
- Taveuni: 18%
- Suncoast: 14%
- Suva/Pacific Harbour: 8%
- Lau Islands: 3%
- Labasa: 3%
- Kadavu: 2%
- Lomaiviti: 2%

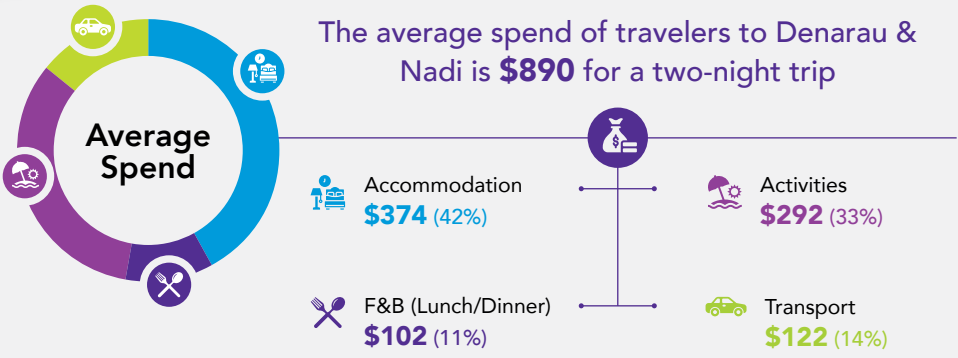
Fiji's most sought after destinations

When asked where local tourists would like to travel next, many responded with the same popular destinations on **Viti Levu**. But locals are also looking to explore new regions and other islands, including **Vanua Levu**, **Taveuni** and the **Mamanuca & Yasawa groups**.



Denarau & Nadi

Denarau & Nadi is a major tourism destination, easily accessible by road and typically catering to the family market looking for rest & relaxation (R&R) as well as those attending corporate events or workshops.



Main visitors to Denarau & Nadi are:



Prefer to stay in **5-star** hotels

Often take holiday **3-4 times** a year

Typically stay **2** nights

Travel by **Personal vehicle** to Nadi

Main Holiday Times

- Long weekends
- Christmas
- Hotel specials

Top Information Source

- Social Media
- Word of Mouth
- Hotel Websites

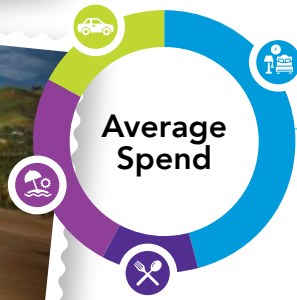
Coral Coast

Coral Coast is home to some of Viti Levu's best beaches, and is renowned for its family-friendly resorts, wedding chapels and world-class convention centers.

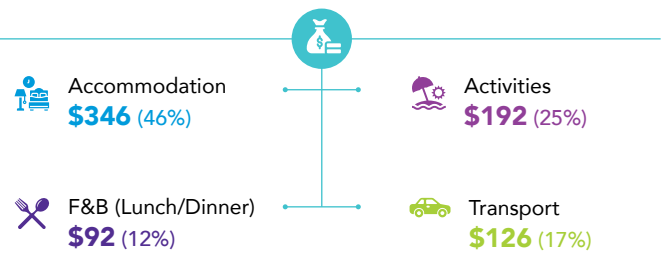


24% of people said they usually travel to Coral Coast

25% said Coral Coast was the **new region** they'd like to explore



The average spend of travelers to Coral Coast is **\$756** for a two-night trip



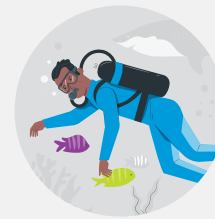
Main visitors to Coral Coast are:



61% Family travelers



15% Groups



48% interested in adventure activities

47% are looking for a room with breakfast for **\$173/night**



17% are looking for an all-inclusive (accommodation & all meals) package for **\$220/night**



Prefer to stay in **4-star** hotels



Often take holiday **3-4 times** a year



Typically stay **2** nights



Travel by **Personal vehicle** to Coral Coast



Main Holiday Times

- Long weekends
- Christmas
- School Holidays



Top Information Source

- Social Media
- Word of Mouth
- Hotel Websites

Suva

Suva is Fiji's capital and largest city, and offers a range of historical sites, museums, parks, markets and vibrant nightlife for local tourists.

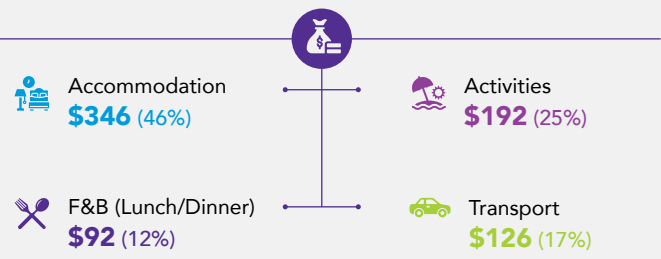


10% of people said they usually travel to Suva

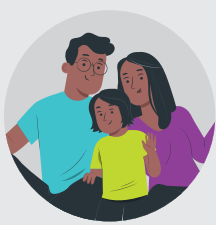
20% said Suva was the new region they'd like to explore



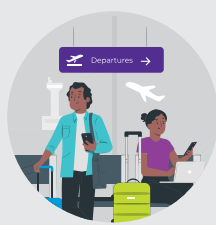
The average spend of travelers to Suva is **\$796** for a two-night trip



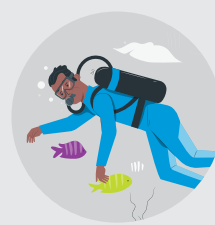
Main visitors to Suva are:



54%
Family travelers



21%
Business travelers



11%
Travel for sports & music events

31% are looking for a room with breakfast for **\$173/night**



22% are looking for an all-inclusive (accommodation & all meals) package for **\$220/night**



Prefer to stay in **4-star** hotels



Often take holiday **Once** a year



Typically stay **2** nights



Travel by **Personal vehicle** to Suva



Main Holiday Times

- Long weekends
- Christmas
- Hotel specials



Top Information Source

- Social Media
- Hotel Info Desks
- Hotel Websites

Emerging Regions



Savusavu

Savusavu is Vanua Levu's tourism hub, and the ideal spot for water-based adventures, whether yachting, diving or paddle-boarding.

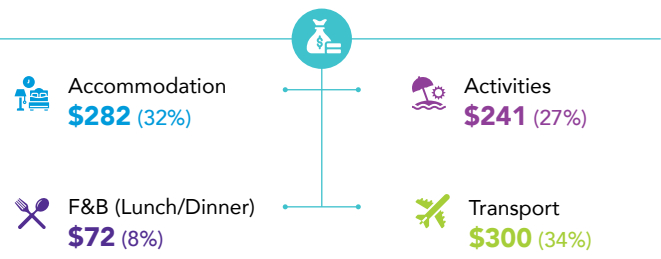


2% of people said they usually travel to Savusavu

15% said Savusavu was the new region they'd like to explore



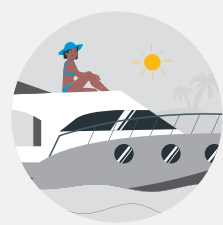
The average spend of travelers to Savusavu is **\$895** for a two-night trip



Main visitors to Savusavu are:



55% Family travelers

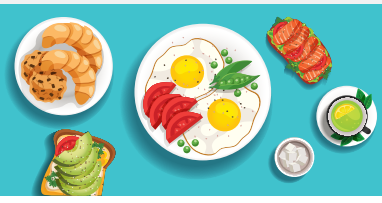


6% Premium leisure



48% Expats

50% are looking for a room with breakfast for **\$141/night**



16% are looking for an all-inclusive (accommodation & all meals) package for **\$189/night**

Prefer to stay in **4-star** hotels

Often take holiday **3-4 times** a year

Typically stay **2** nights

Travel by **Airplane** to Savusavu

Main Holiday Times

- Long weekends
- Hotel Specials
- Christmas

Top Information Source

- Social Media
- Word of Mouth
- Hotel Websites

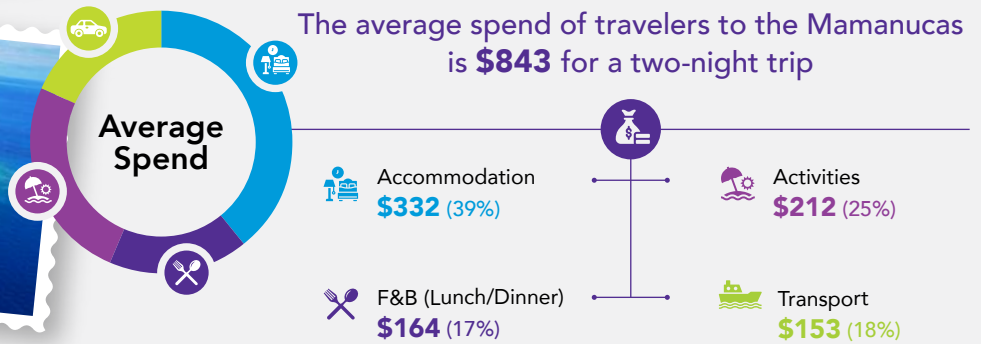
Mamanucas & Yasawas

Mamanucas & Yasawas are some of Fiji's most picturesque islands, and renowned for their high-end luxury and family resorts, perfect for diving, surfing, or just relaxing on the beach.



2% of people said they **usually travel** to Mamanucas & Yasawas groups

20% said Mamanucas & Yasawas were the **new region** they'd like to explore



Main visitors to the Mamanucas are:

58%
Family travelers

23%
Couples

5%
Expats

45% are looking for a room with breakfast for **\$166/night**

21% are looking for an all-inclusive (accommodation & all meals) package for **\$260/night**

Prefer to stay in **5-star** hotels

Often take holiday **Once** a year

Typically stay **2** nights

Travel by **Boat transfer** to the Mamanucas

Main Holiday Times

- Long weekends
- Hotel specials
- Christmas

Top Information Source

- Social Media
- Hotel Info Desks
- Knowledge of Previous Visits

Taveuni

Taveuni is the garden island of Fiji, home to the Bouma National Heritage Park and famous Bouma waterfalls.



1%

of people said they usually travel to Taveuni



10%

said Taveuni was the new region they'd like to explore



The average spend of travelers to Taveuni is **\$1083** for a two-night trip

Accommodation **\$464** (43%)

Activities **\$225** (21%)

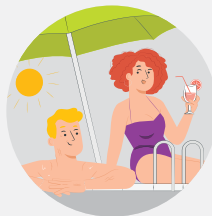
F&B (Lunch/Dinner) **\$94** (9%)

Transport **\$300** (28%)

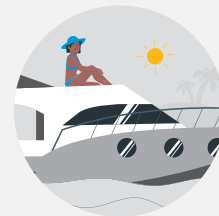
Main visitors to Taveuni are:



55%
Family travelers



6%
Expats



48%
Premium leisure

47% are looking for a room with breakfast for **\$232/night**



19% are looking for an all-inclusive (accommodation & all meals) package for **\$271/night**



Prefer to stay in **4-star** hotels



Often take holiday **3-4 times** a year



Typically stay **2** nights



Travel by **Airplane** to Taveuni



Main Holiday Times

- Long weekends
- Hotel Specials
- Christmas



Top Information Source

- Social Media
- Word of Mouth
- Hotel Information Desk



Key Findings

With borders closed indefinitely, attracting local visitors is essential to sustaining business for any local tourism operator. To do this, hotels need to tailor their offer to what Fijian tourists are looking for. This research, which collected survey responses from over 10,000 local tourists, as well as interviews with tourists and operators, has found the following:

Market Segments



Families are by far the biggest segment in the local market. Fijian families tend to be larger, often having more than 2 kids - the standard for most hotel rooms. Many family travelers also take holidays with their grandparents and extended family.



Quick win

Think creatively about ways to accommodate larger family groups, such as:

- Discounts on additional/adjoining rooms for older kids.
- Rearranging hotel rooms so there is more space to accommodate extra kids and using this as a marketing tool to attract family travelers.
- Making it possible to indicate family size during booking and setting up the rooms accordingly, so they are together and do not have to ask for rollaway beds after they check-in.





Couples made up roughly a quarter of travelers, making them the second biggest segment. They have a relatively large spend per person, particularly on food and beverages.



Quick win

Couples have the biggest food & beverage spend of all the segments, so hotels and resorts should continue to offer packages (such as romantic private dining experiences) which will appeal to them and maximise their spend.

Couples have high levels of interest in both multi-day and day cruises, especially as a way to see new regions outside of Viti Levu. Offering discounts for locals in peak periods (long weekends, school holidays and Christmas & New Year) has proved successful for businesses looking to increase sales.



Premium leisure travelers are a larger and more diverse segment than the industry may have realised. While there have always been wealthy local families who stay at top resorts (and are now even more likely to with international travel impossible), there's also a significant portion of this high-spend segment who are young professionals saving up to then spend big on their holidays, or who are older travelers looking for new experiences and for whom money isn't an issue.

This segment has a comparatively low spend on activities, but many reported that this is more to do with the lack of appealing and unique destination activities being offered. When they do find them, they tend to travel to niche destinations for their activities – whether it be for multi-day cruises, dolphin watching or diving.



Quick win

Develop (and market) more of these all-inclusive niche destination activity packages to capture this segment, who are willing to pay a premium for something unique and memorable.



Expats generally have a higher spend than locals, and are more likely to travel to regions outside Viti Levu. Many feel, similarly to premium leisure travelers, that there's a lack of well-designed packages available which offer an easy way to see new parts of Fiji and try new activities. These segments are less price sensitive, and there's a clear market gap that can be addressed here.



Marketing



Word of mouth and social media are important information sources for high yielding segments, including expats and premium leisure travelers. This is particularly important for niche destinations or activities: if something is perceived as more expensive or more complicated to organize, you're more likely to take the leap if you'd had a recommendation from someone you know.



Quick win

Hotels and resorts in niche destinations could consider introducing referral reward systems which encourage repeat visits as well as new customers (e.g. a 10% discount on your next booking if you refer a friend who books)

Incentivise social media posting (e.g., by creating hashtag competitions) as a way of getting free advertising within the expat community.



Over half of people surveyed said they have been motivated to travel in the last year purely to make the most of the deals they see. The most popular sources of information for all travelers are social media, word of mouth and hotel websites. The Love Our Locals platform is most popular with group travelers and couples as a way to find deals – many group travelers reported seeing deals and then finding friends who they could travel with to make the most of the discount.



Quick win

Continue advertising deals on social media and use the Love Our Locals platform to drive volume with couples and groups.



Some hotels have found success through marketing their destination and creating events, rather than just advertising the hotel itself.



Quick win

Develop themed weekends or partner with other local entertainment providers to develop weekend packages that are more exciting for visitors.



Packages & Deals



A lot of respondents are interested in visiting regions outside of Viti Levu, but are continuing to stick to Denarau, Coral Coast & Suva. There's a (likely accurate) sentiment that travelling elsewhere is more complicated and more expensive, so hotels need to develop packages which feel 'easy' and affordable to capture this untapped market.



Most travelers are also primarily interested in booking a room that includes breakfast, and having more flexibility to choose the free add-ons, from sunset cocktails to nanny services.



Quick win

Develop 'all-inclusive' niche destination packages including transport (air & sea) and local transfers, plus additional suite of free destination activities and/or add-on services to choose from.



Longer-term strategy

Continue to develop local deals to drive volume in the off-season, and develop local membership or rewards programs that encourage more regular local travel.



Food & Beverage Options



Many locals prefer to eat at restaurants rather than in-hotel to reduce costs (and some prefer self-contained apartments for the same reason). 86% of respondents felt that hotel meal and restaurant prices were too expensive.



Quick win

Tailor food and beverage offerings to local customers' tastes, budgets and group sizes. For example:

- Kids Eat Free deals and offering affordable kids meals will encourage more families to enjoy in-hotel dining.
- In general, many respondents said they were looking for more local foods and increased portion sizes.
- Introduce sharing or tasting menus to reduce reluctance to spend a lot on a meal that customers aren't sure they'll like.
- Introduce food packages, such as buffet lunches or dinners with beverages included.
- Improve entertainment options in hotel restaurants, such as local music.
- Provide menus and information on deals at check-in and in rooms so that customers can feel confident in advance that they can eat within their budget.
- Set up BBQs in accessible areas – allowing visitors to bring in and cook their own food, but pairing with affordable snacks or drinks for sale.





Activities



Cruises were by far the most popular activity among those surveyed. Packaged day-cruises were the most popular activity for every segment. In face-to-face interviews, there was also a lot of interest in multi-day cruises, with people wanting to take this opportunity to see more remote regions outside Viti Levu.



Quick win

Look into re-packaged multi-day cruises for locals, providing options for budget and premium travel.

Capitalise on the interest in local cruises by packaging and discounting together with hotel and activity providers.



Adventure activities are growing in popularity, but for many people this still seems aspirational, and it was often 'bucket list' activities (like sky diving) that were the most popular and discussed. However, there is a definite mismatch in locals' interests, and their budgets for these activities. If operators can introduce a package at the right price point, there's potentially a large market to tap into.



Quick win

To capitalize on growing interest in activities like diving or ziplining, operators should consider offering special introductory or try-out deals for locals.



Longer-term strategy

Consider introducing subsidized local rates for activities and attractions which will continue to attract local visitors in the off-season once international tourists return.





Customer Service



Many respondents felt that hotel staff have lower customer service standards when it comes to dealing with local guests, compared to international visitors.



Quick win

Working with teams to address any customer services issues and improving HR systems so that when issues are raised they can be dealt with effectively.

