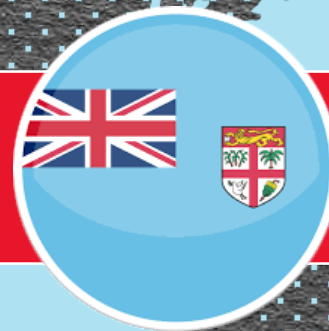


# INTERNATIONAL VISITOR SURVEY

## FIJI



Interim Report for January – June 2019  
Published January 2020



MINISTRY OF  
INDUSTRY, TRADE  
AND TOURISM



**IFC**

International  
Finance Corporation  
WORLD BANK GROUP

*Creating Markets, Creating Opportunities*



**NEW ZEALAND**  
FOREIGN AFFAIRS & TRADE



The 2019 **Fiji International Visitor Survey** is an initiative of the Ministry of Industry, Trade and Tourism with the support of the International Finance Corporation (IFC). It represents an enhanced methodology with an increased sample size to the previous IVS methodology and is based on international best practices.



This report is an interim report with data from the first six months of 2019 only. It contains provisional data that will be updated in the full year 2019 report. Unless otherwise stated, all reported figures are provisional and subject to periodic review.



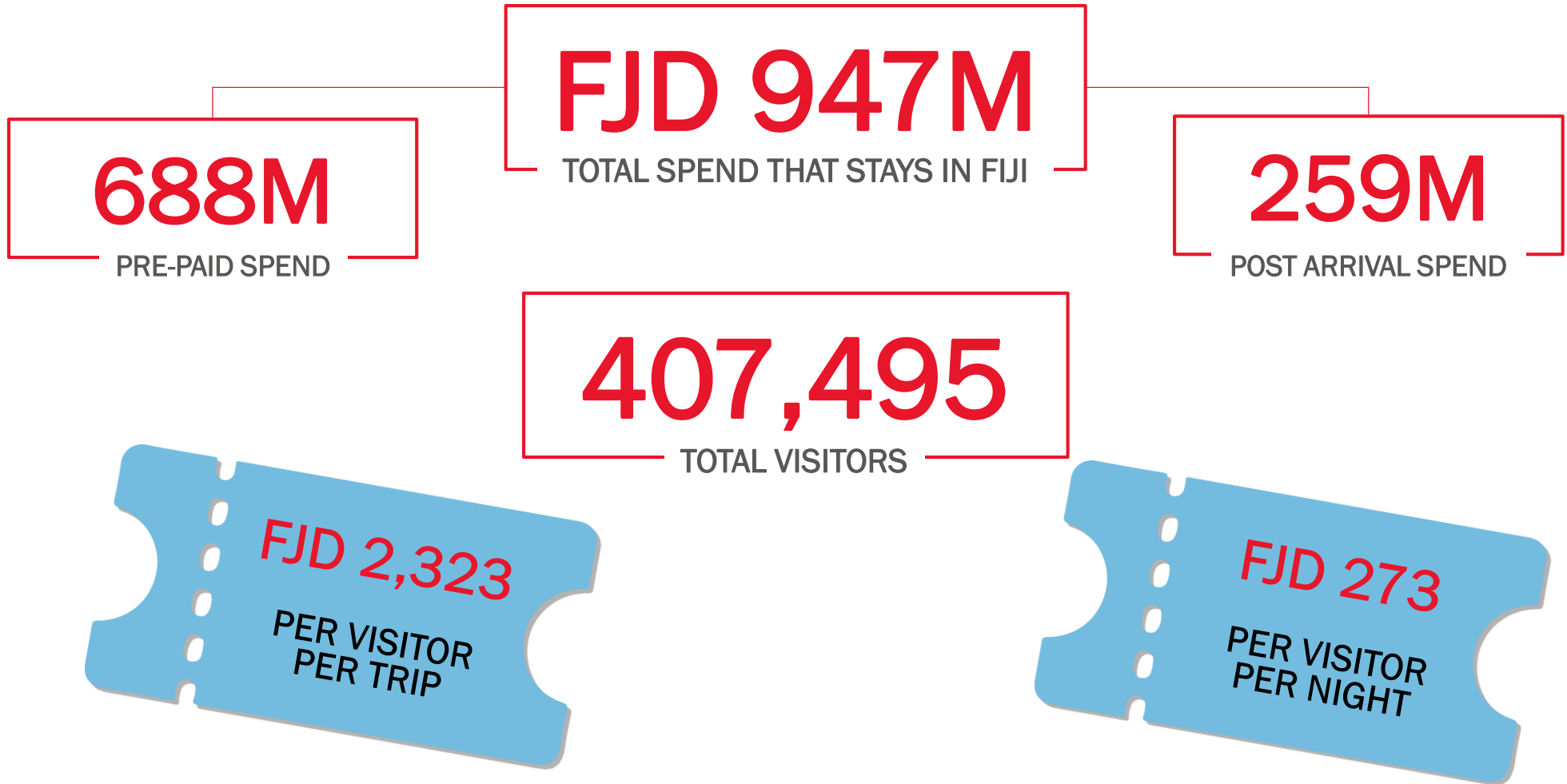
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# TOTAL VISITORS CHARACTERISTICS

JANUARY – JUNE 2019





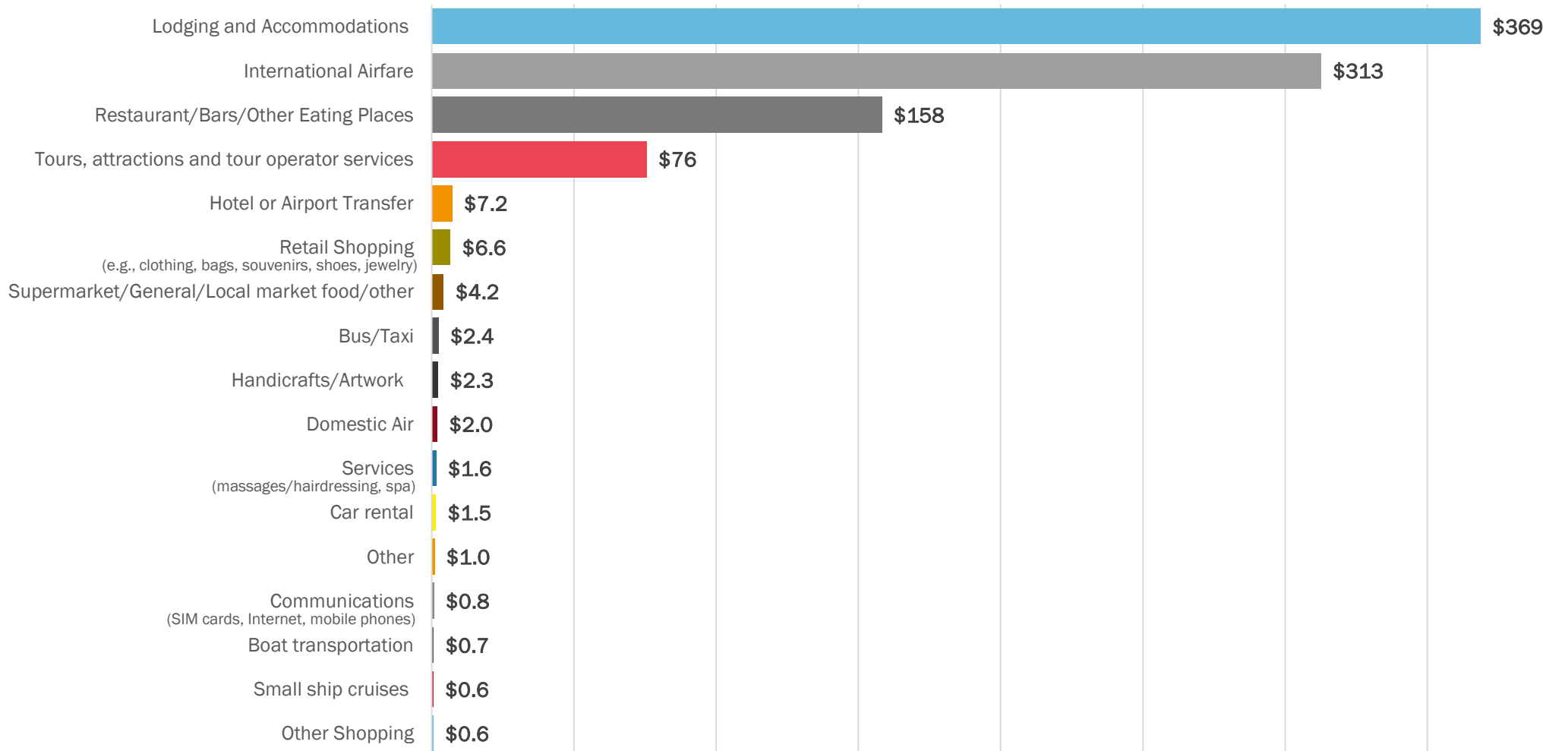
Total visitor arrivals in the first six months of 2019 increased +6% over the same period last year amounting to 407,495 visitors. The spending by visitors totaled to FJD 947M with FJD 259M spent after arrival in Fiji. The average visitor spent FJD 2,323 on their trip to Fiji.

Figures exclude Fiji Residents and Persons In-Transit. Spending excludes in-market expenses such as commissions but includes a portion of overseas airfare. See Appendix.

# SUMMARY OF KEY FINDINGS: VISITOR SPEND

JANUARY – JUNE 2019 TOTAL VISITORS

## Total Spend (FJD million)



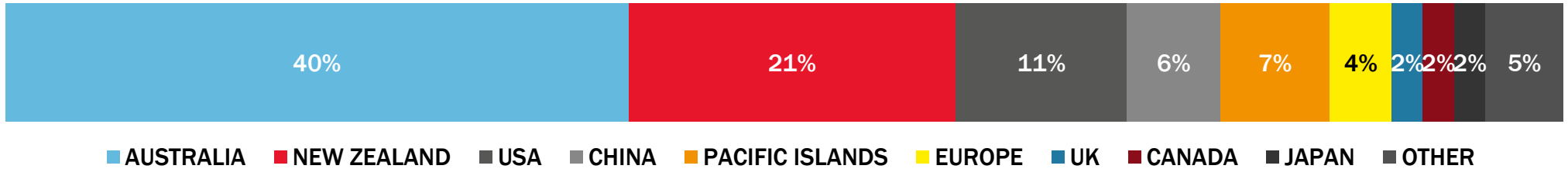
The largest contribution to Fiji's economy came from spending on Lodging, \$369 Million or 39% of total spending. One-third of visitor spending (\$313 Million) was attributed to spending on International Airfare and 17 percent (\$158 Million) on Restaurant and Bars, particularly through meals included in pre-paid packages. Total Shopping (Retail, Handicrafts, Communications, Services, Other Shopping) accounted for \$11.9 Million.

Figures exclude Fiji Residents and Persons In-Transit. Spending excludes pre-paid expenses such as marketing costs and commissions.

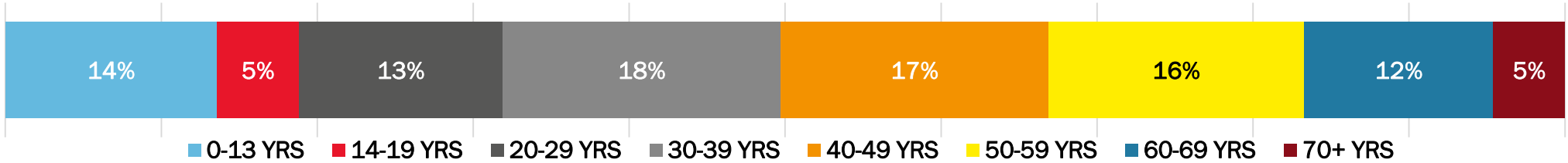
# TOTAL VISITORS DEMOGRAPHICS

JANUARY – JUNE 2019 TOTAL VISITORS

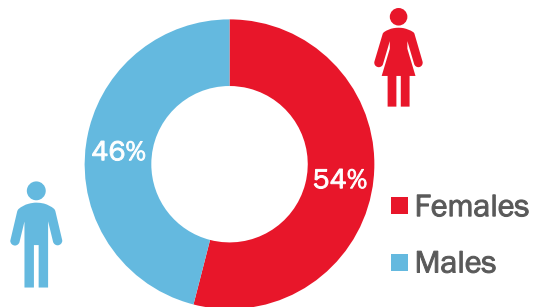
## TOTAL VISITORS (%) BY SOURCE MARKET



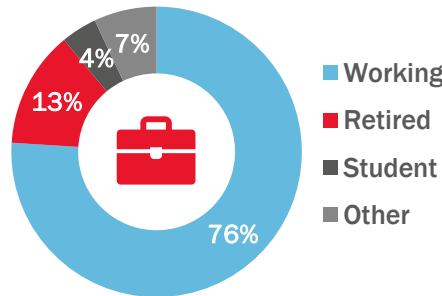
## AGE OF VISITORS (%)



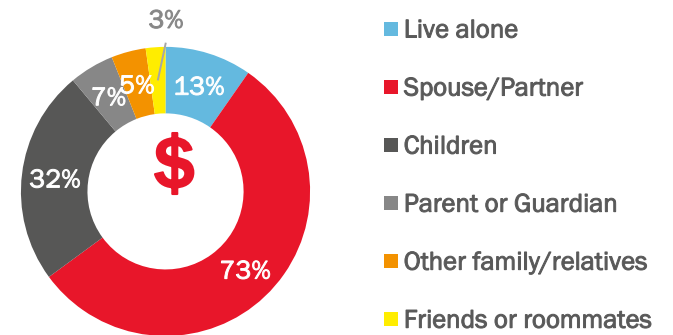
## GENDER



## EMPLOYMENT STATUS

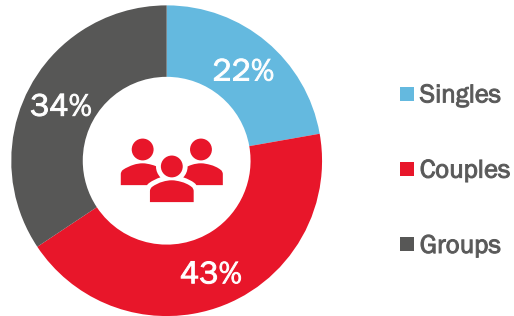


## HOUSEHOLD

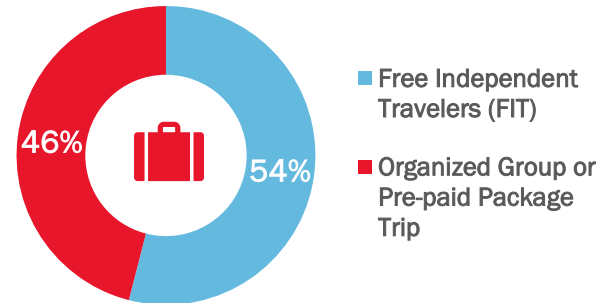


Australia continued to be the largest source for visitors to Fiji, with New Zealand and USA a distant second and third. The average age of the party head was between 40-49 years old. Most of these visitors worked full or part time, though just over 1-in-10 were retired. Most respondents lived with a spouse and a third had children in the household.

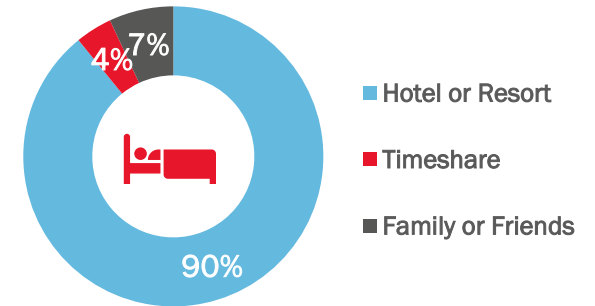
### PARTY SIZE



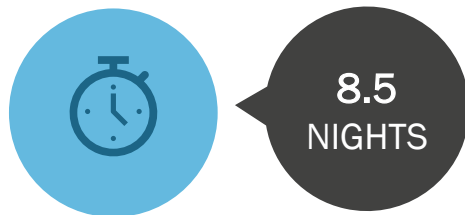
### TYPE OF TRAVELLERS



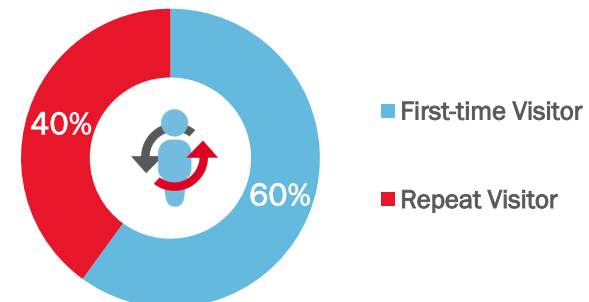
### ACCOMMODATION



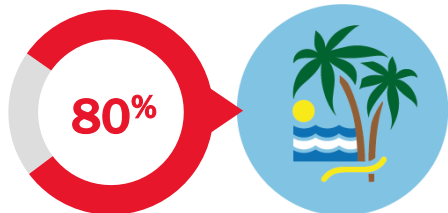
### AVERAGE LENGTH OF STAY



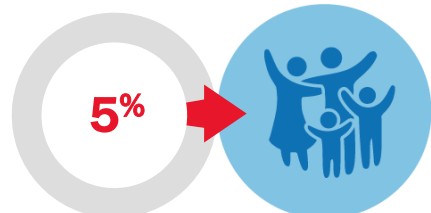
### NEW OR RETURNING



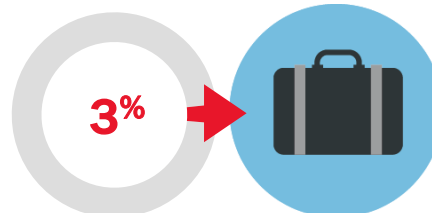
On average, visitors stayed 8.5 nights and travelled mainly as couples (43%). Another one-third of visitors came as small groups with an average of five people. The majority (60%) were first time visitors and over half planned their own travel (not on an organized trip). Almost everyone (90%) stayed at a hotel or resort.



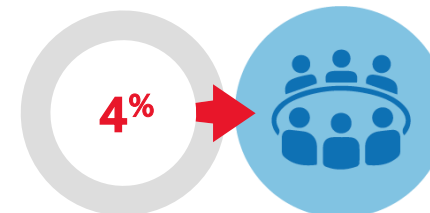
**HOLIDAY**



**VISITING FRIENDS & RELATIVES**



**BUSINESS**



**CONFERENCE**



**AVERAGE LENGTH OF STAY**



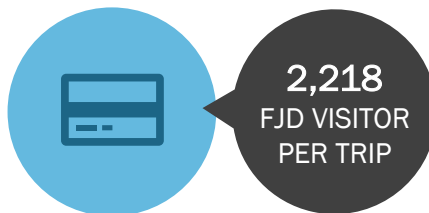
**AVERAGE LENGTH OF STAY**



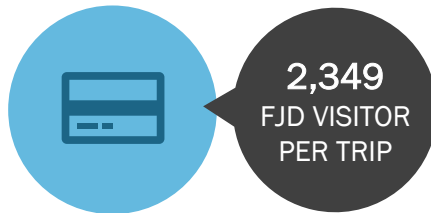
**AVERAGE LENGTH OF STAY**



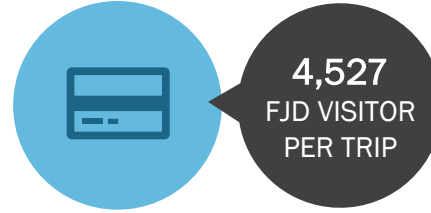
**AVERAGE LENGTH OF STAY**



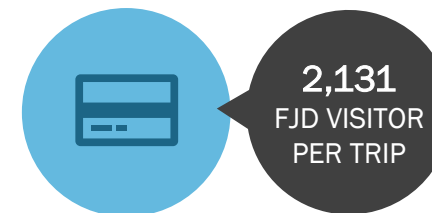
**SPEND**



**SPEND**



**SPEND**



**SPEND**

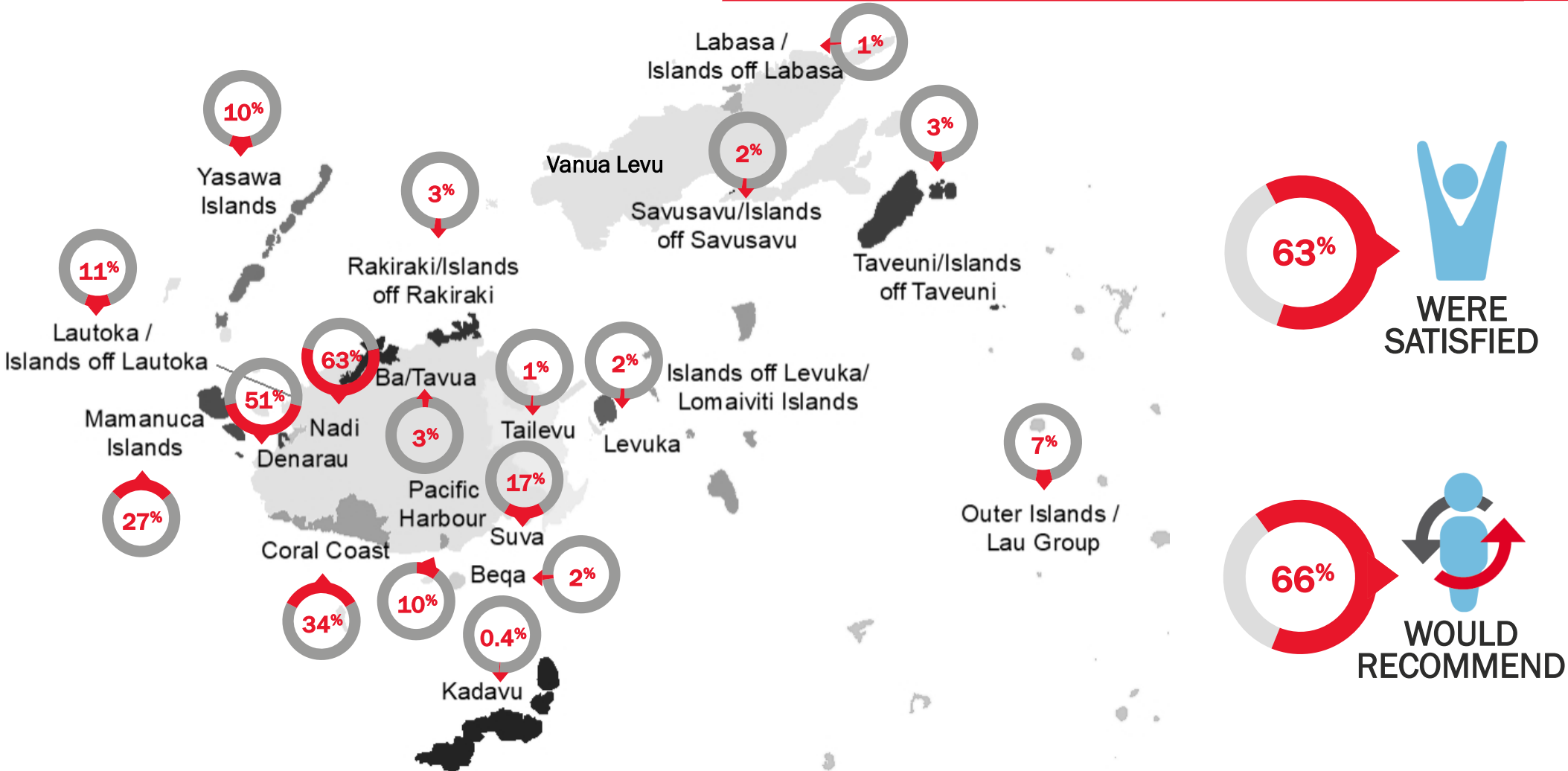
The vast majority of visitors were on holiday (80%) with 1-in-5 specifically to celebrate a special occasion. Visiting friends and relatives accounted for 5%, while combined business travelers and those who attended a conference was another 7%. Business travelers spent the most on their trip because of the longer stay. The VFR market also stays longer than average but spent less due to lower in-Fiji spending.

Note: Purpose of visit percentages based on IVS responses not actual immigration data.



# REGIONS VISITED & VISITOR SATISFACTION

JANUARY – JUNE 2019 TOTAL VISITORS



Most visitors spent time in Nadi and Denarau. Other popular destinations included Coral Coast and Mamanuca Islands. Overall two-thirds of visitors were satisfied with their trip and would recommend Fiji to their family and friends

Note: Multiple responses, therefore totals do not add up to 100%

SOURCE MARKET PROFILES

JANUARY – JUNE 2019





163,826

TOTAL VISITORS

FJD 302M

TOTAL SPEND

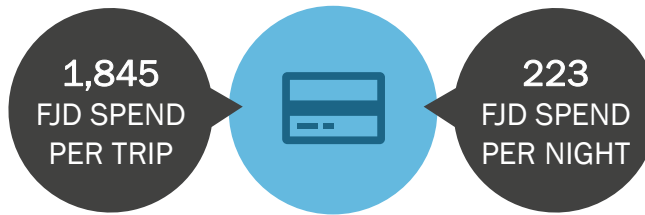
FJD 211M

PRE-PAID SPEND

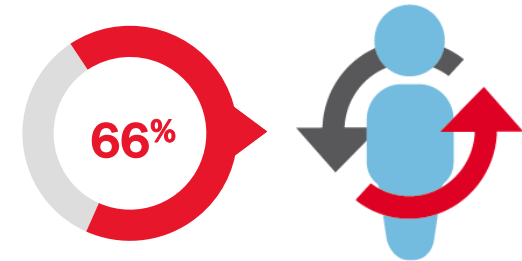
AVERAGE LENGTH OF STAY



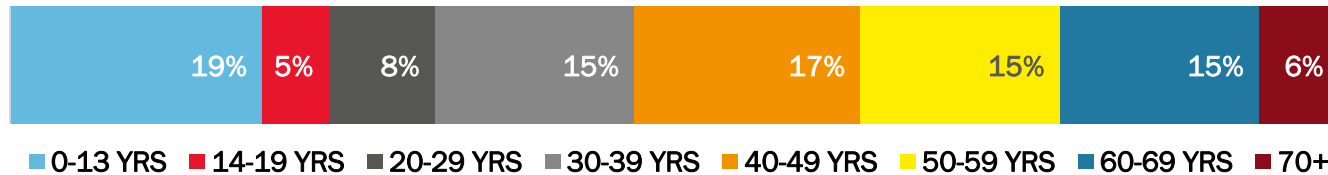
SPEND



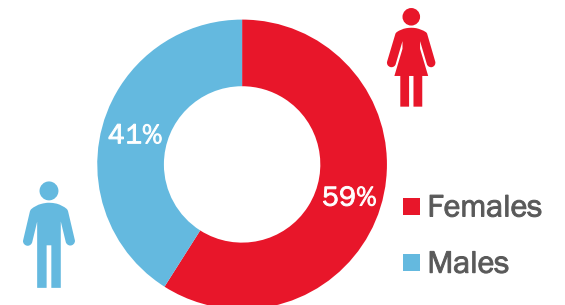
SATISFACTION



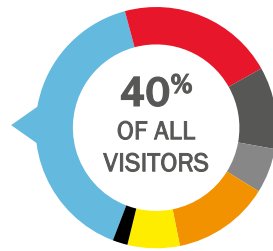
AGE OF ALL VISITORS



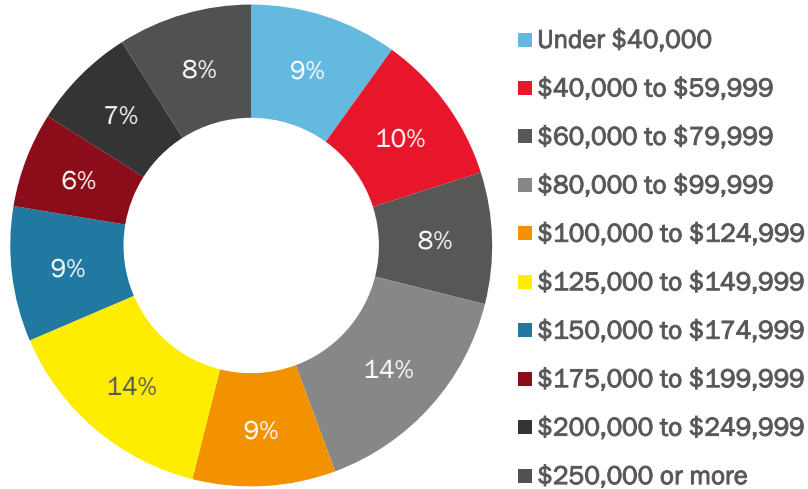
GENDER



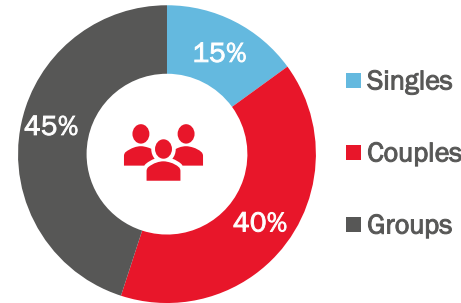
Visitors from Australia increase another +2.5% and continued to account for the largest share of visitors (40%). Australians spend slightly less than the overall average visitor due to a lower pre-paid package cost and slightly less post-arrival spending.



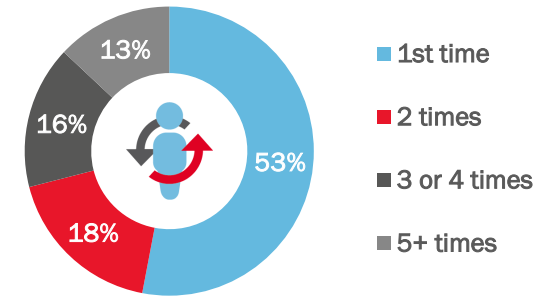
## ANNUAL HOUSEHOLD INCOME (AUD)



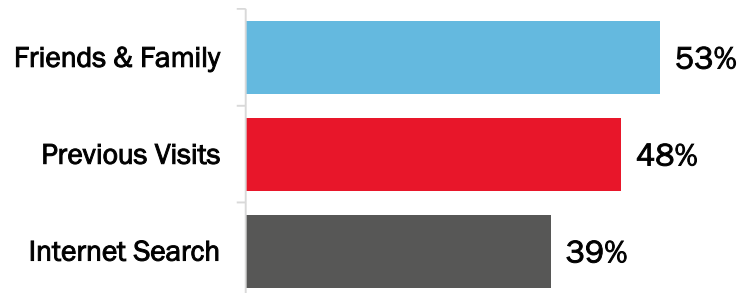
## PARTY SIZE



## NUMBER OF VISITS



## TOP INFORMATION SOURCES USED FOR PLANNING\*



## TOP INFLUENCING FACTORS FOR VISITING\*

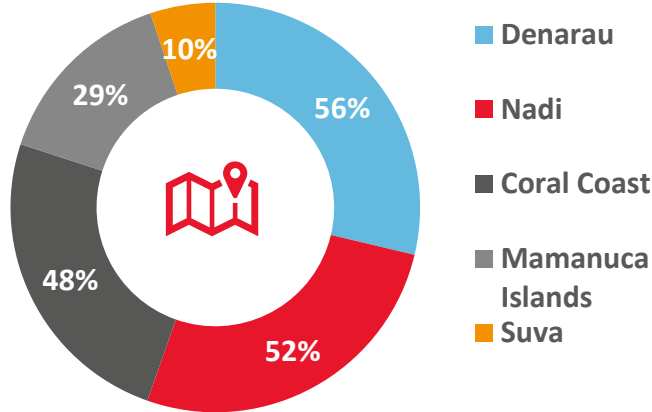


The Australian visitor spanned the full range of economic status and usually traveled in groups or couples and rarely traveled alone. This market has a high number of repeat visitors (47%), as such, Australians rely on friends & family and previous visits for planning information. Australians find Fiji appealing as a family friendly destination, its friendly local people, and the value compared to other destinations.

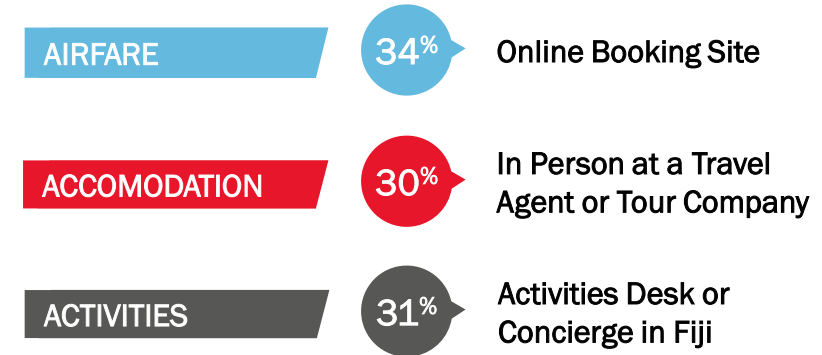
\*Multiple responses, therefore totals do not add up to 100%



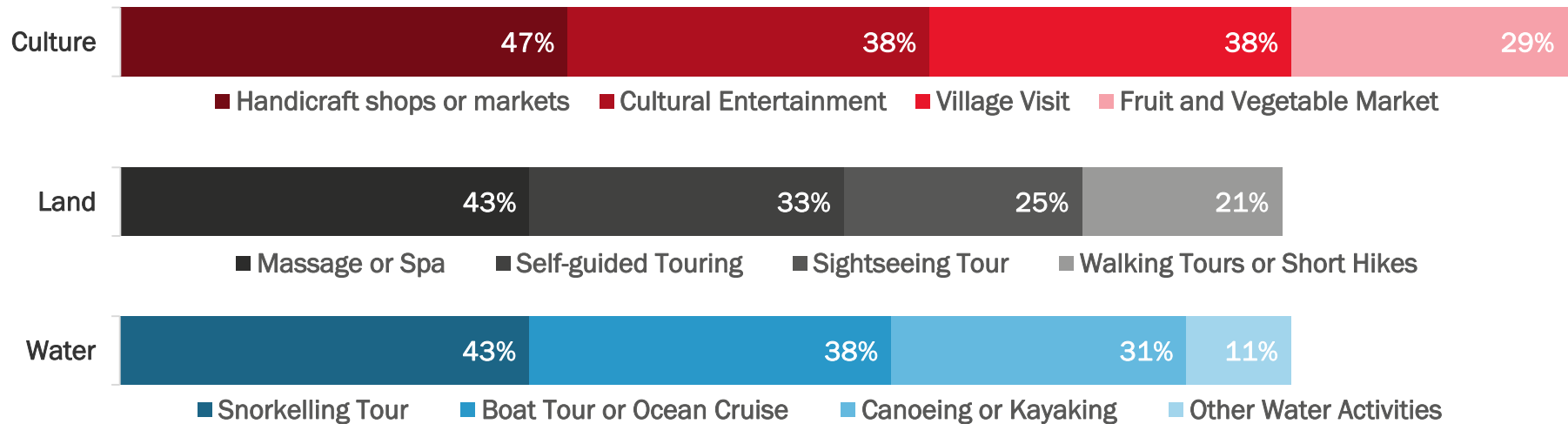
## TOP 5 REGIONS VISITED



## TOP METHOD FOR BOOKING TRAVEL



## TOP ACTIVITIES\*

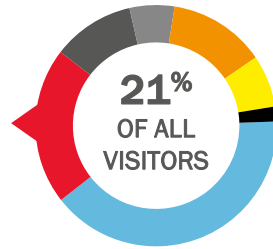


Compared to other markets, Australians were more likely to stay on the Coral Coast. Australians were very active travelers especially participating in many more cultural activities. Accommodations were typically booked through a travel agent.

\*Multiple responses, therefore totals do not add up to 100%

JAN 2019 – JUN 2019

NEW ZEALAND



83,749

TOTAL VISITORS

FJD 140M

TOTAL SPEND

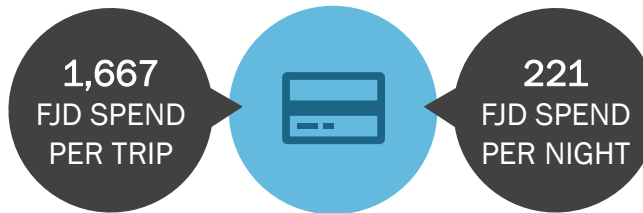
FJD 100M

PRE-PAID SPEND

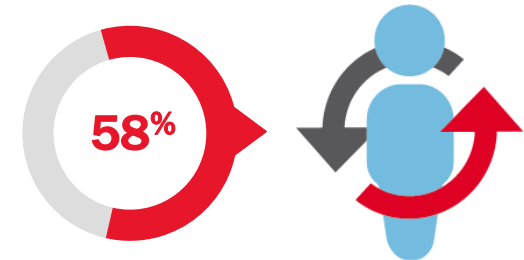
### AVERAGE LENGTH OF STAY



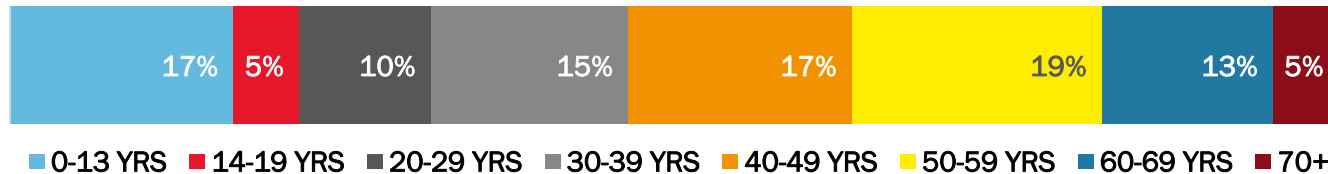
### SPEND



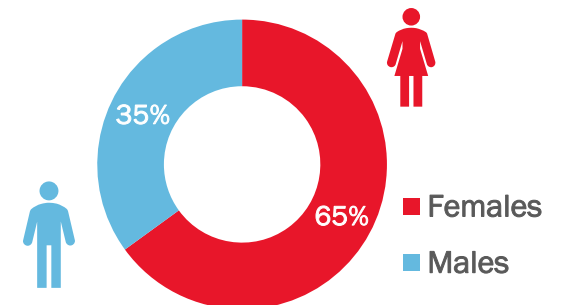
### SATISFACTION



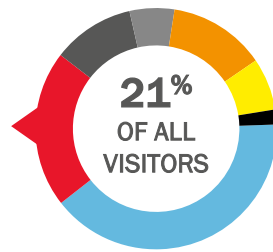
### AGE OF ALL VISITORS



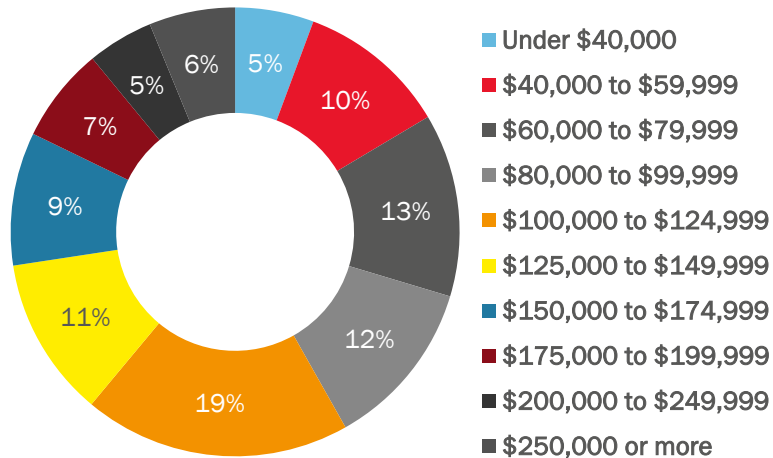
### GENDER



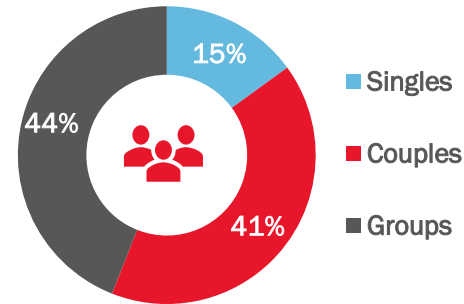
New Zealand visitation to Fiji was up +7.9% in the first six months of 2019. The typical visitor was more likely female. Daily spending by New Zealanders was similar to Australian visitors but per trip spending was lower due to the shortest length of stay among the major markets.



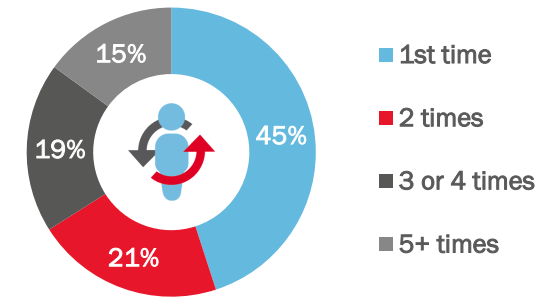
## ANNUAL HOUSEHOLD INCOME (NZD)



## PARTY SIZE



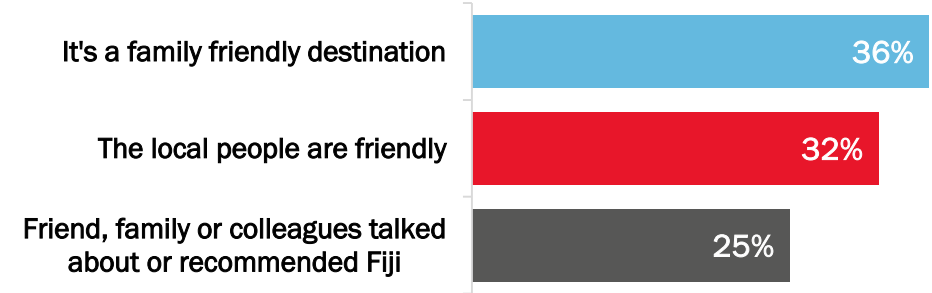
## NUMBER OF VISITS



## TOP INFORMATION SOURCES USED FOR PLANNING\*

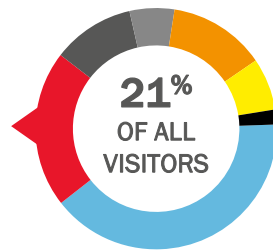


## TOP INFLUENCING FACTORS FOR VISITING\*

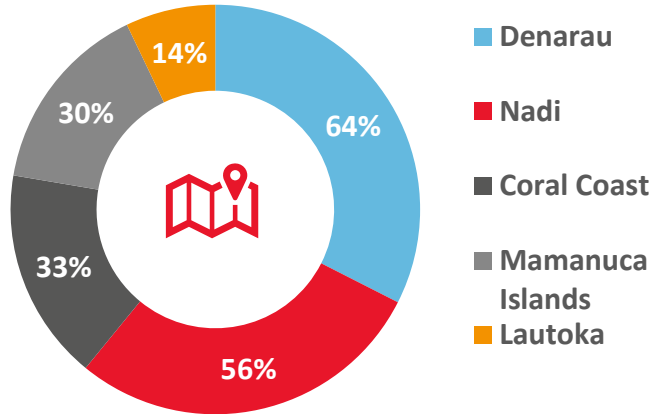


The New Zealand market had an average household income of NZD 100K – 125K and many visitors had already been to Fiji at least once before (55%). As a heavy repeat market, friends and family and past experiences played a large role in planning. However, travel agent information also influenced this market. A friendly destination and the friendly local people were large factors in choosing Fiji. New Zealanders were also strongly influenced to come by recommendations from friends and family.

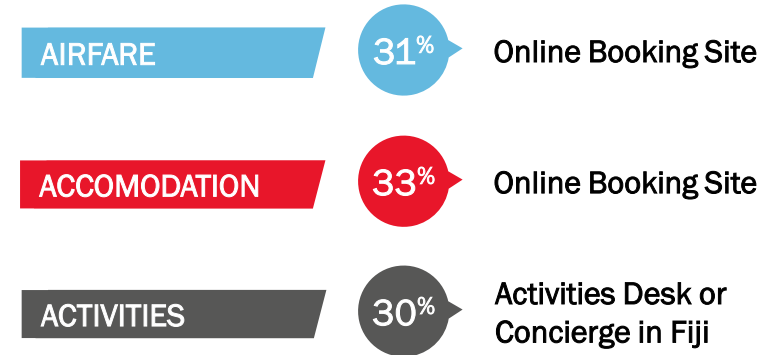
\*Multiple responses, therefore totals do not add up to 100%



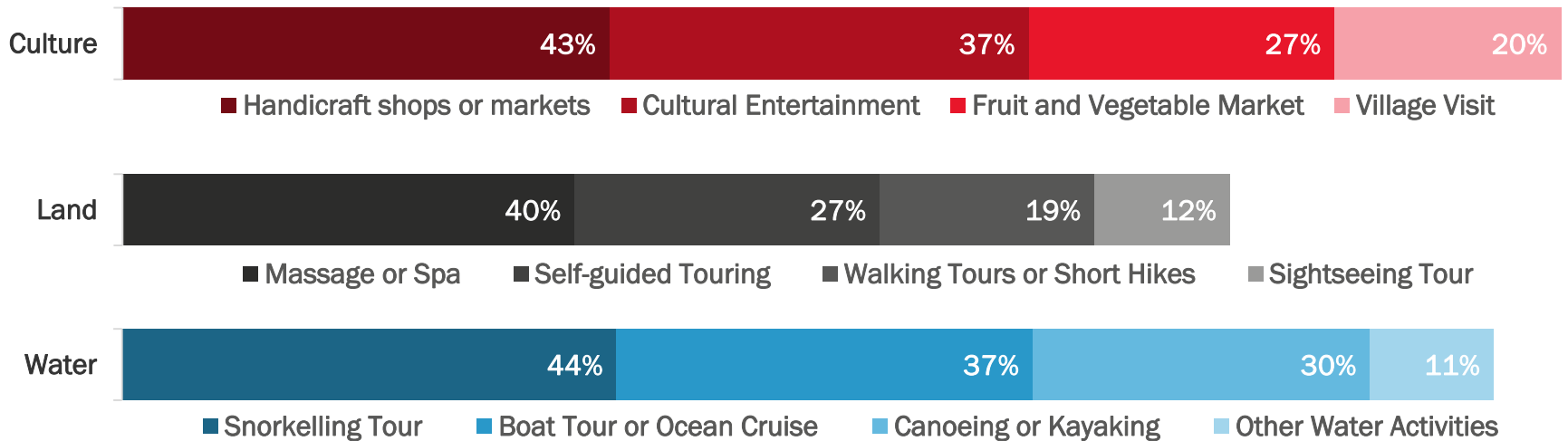
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES\*



Compared to other markets, New Zealanders were more likely to enjoy the Mamanuca Islands as a destination of choice as well as Lautoka. Online was the preferred booking method for both their airfare and accommodations. With many repeat visitors, they were less likely to be interested in markets, village visits and sightseeing tours.

\*Multiple responses, therefore totals do not add up to 100%





46,914

TOTAL VISITORS

FJD 134M

TOTAL SPEND

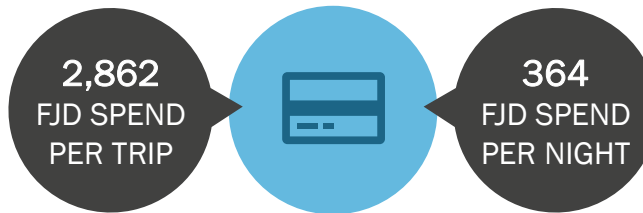
FJD 92M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



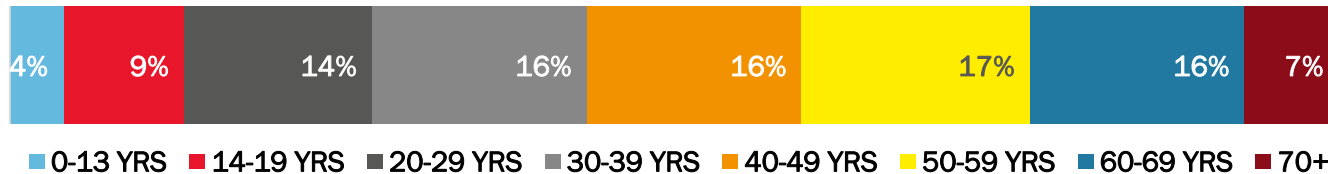
SPEND



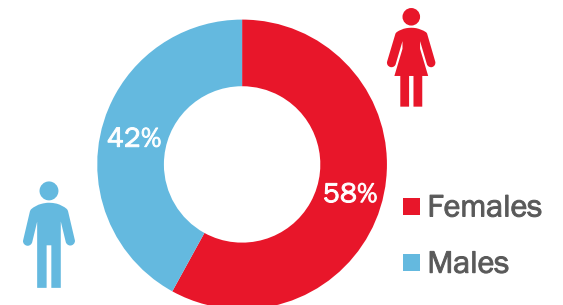
SATISFACTION



AGE OF ALL VISITORS

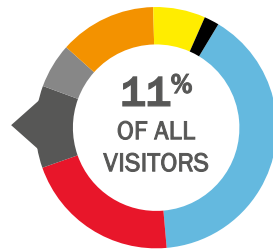


GENDER

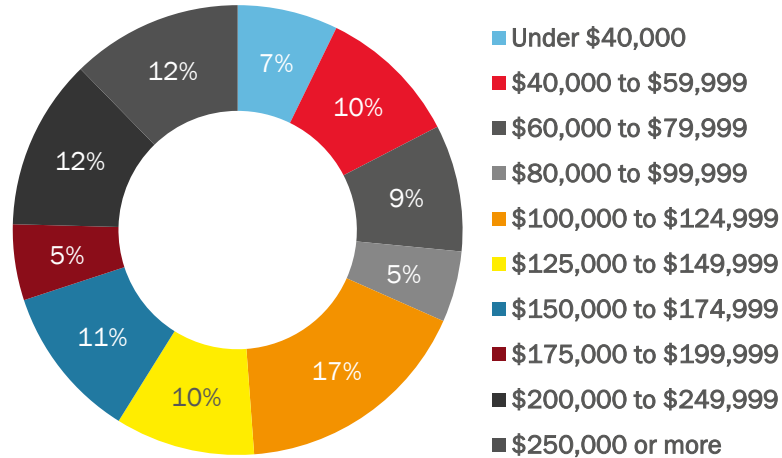


Note: Sample size is relatively small

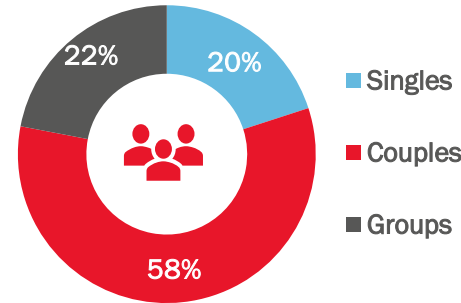
The first six months of 2019 saw a surge in U.S. visitors (+11.6%). Though the average age is like other markets, there were fewer children travelling from the U.S.A. Their average daily spend was the second highest among the major markets and they also spent more than other markets on post-arrival spending in Fiji. Visitors were highly satisfied.



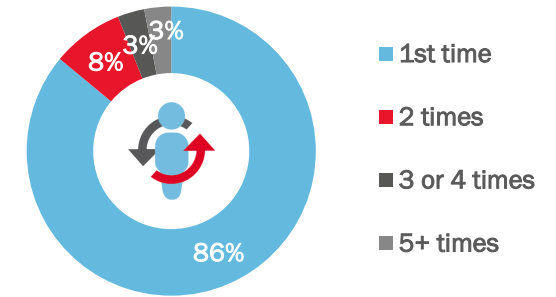
## ANNUAL HOUSEHOLD INCOME (US)



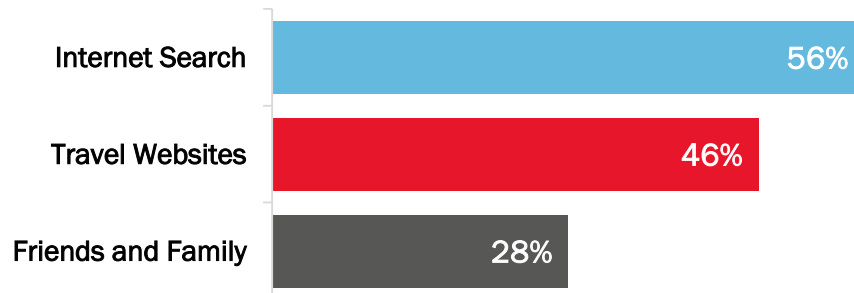
## PARTY SIZE



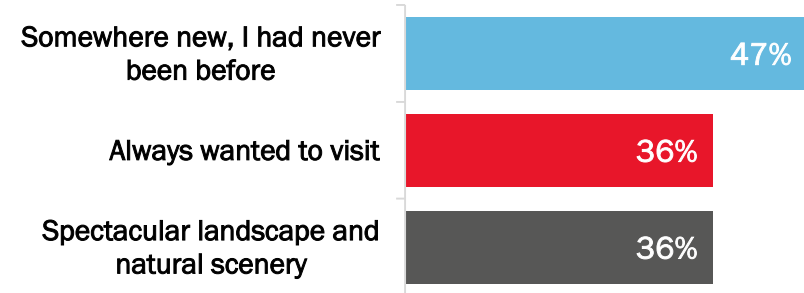
## NUMBER OF VISITS



## TOP INFORMATION SOURCES USED FOR PLANNING\*



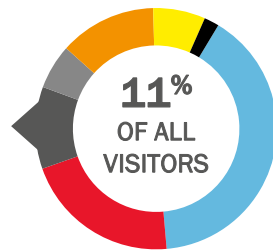
## TOP INFLUENCING FACTORS FOR VISITING\*



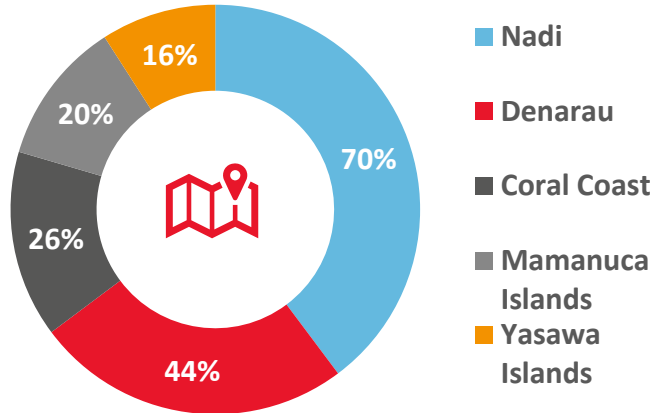
The U.S. market was mainly first-timers travelling as couples. Their average household income was more likely above USD125K. The main source of information on Fiji came from Internet searches and travel websites. Fiji appealed to those looking for a new adventure also as an aspirational destination to some.

\*Multiple responses, therefore totals do not add up to 100%

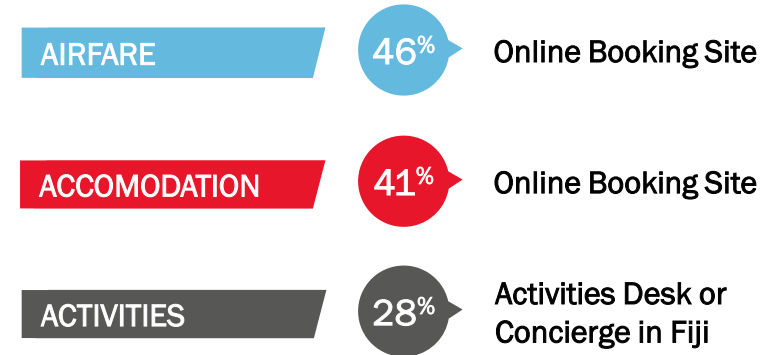
Note: Sample size is relatively small



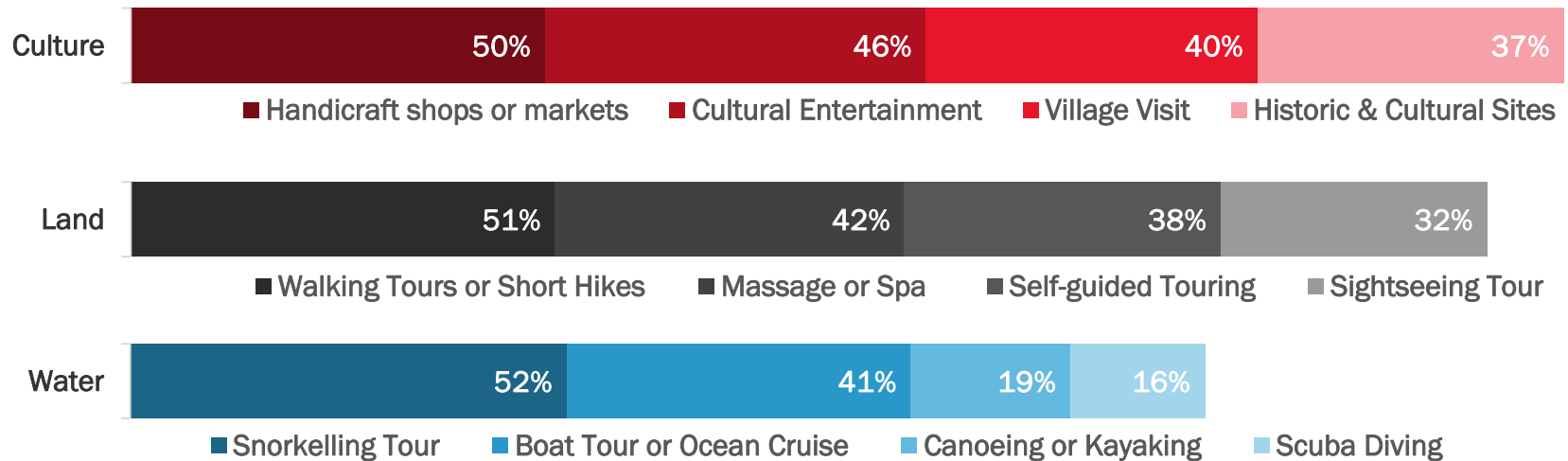
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES\*



\*Multiple responses, therefore, totals do not add up to 100%

Note: Sample size is relatively small

Most of the visitors came through Nadi, though several visitors ventured to the Mamanuca and Yasawa Islands. U.S. visitor heavily relied online methods for booking their travel. U.S. were soft adventure travelers with over half taking walking and hiking tours.



25,020

TOTAL VISITORS

FJD 74M

TOTAL SPEND

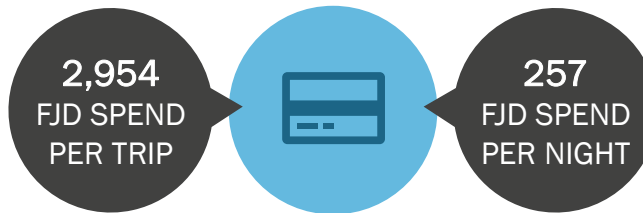
FJD 53M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



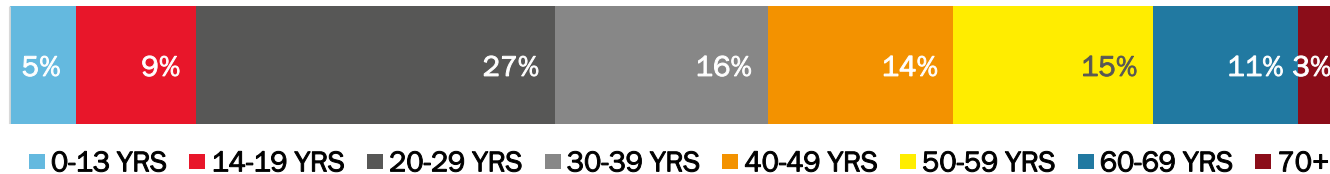
SPEND



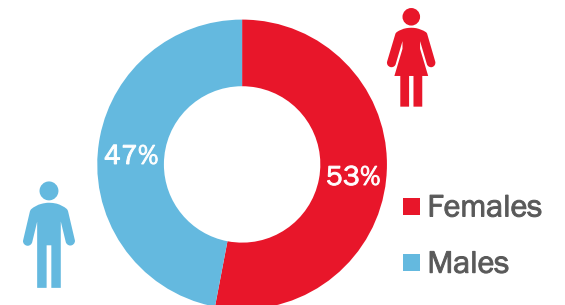
SATISFACTION



AGE OF ALL VISITORS



GENDER

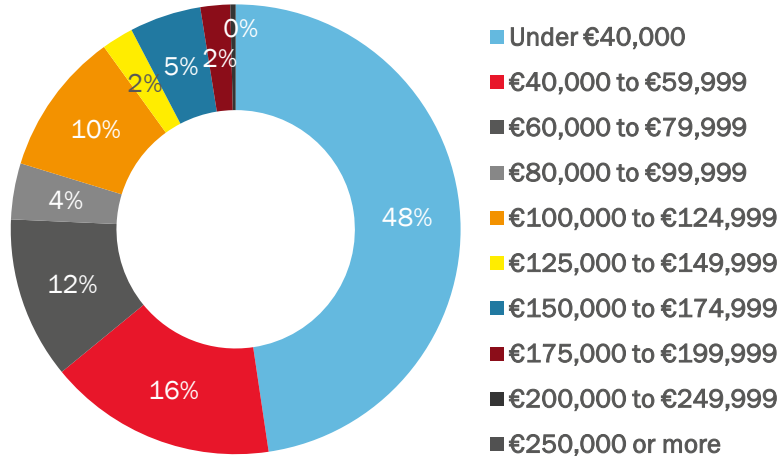


Note: Sample size is relatively small

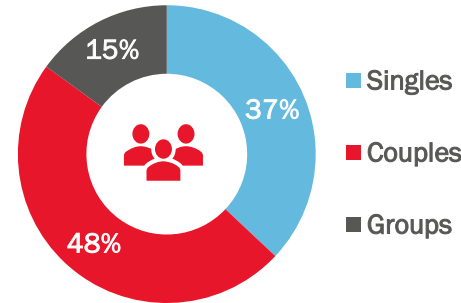
European travelers only accounted for 6% of all visitors and showed increased visitation in 2019 (2.8%) mainly due to a strong growth in U.K. visitors. They stayed a longer time than other markets (11.5 nights) and were also younger.



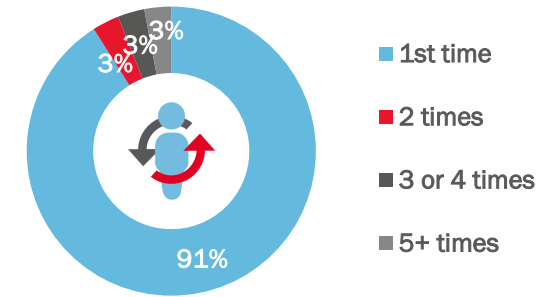
## ANNUAL HOUSEHOLD INCOME (EUR)



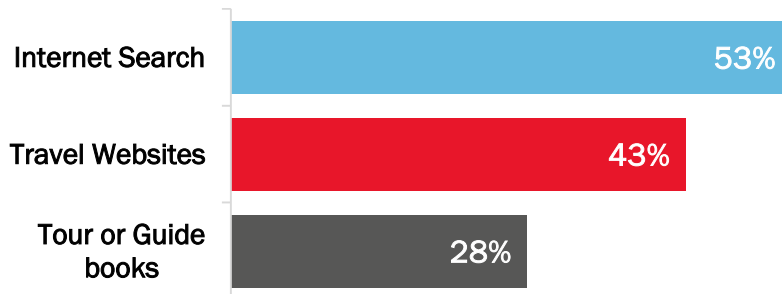
## PARTY SIZE



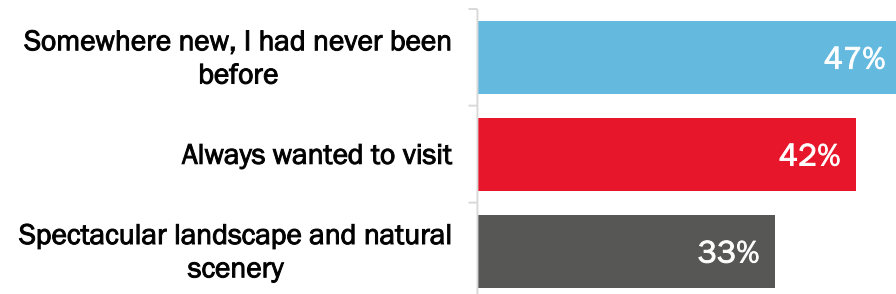
## NUMBER OF VISITS



## TOP INFORMATION SOURCES USED FOR PLANNING\*



## TOP INFLUENCING FACTORS FOR VISITING\*

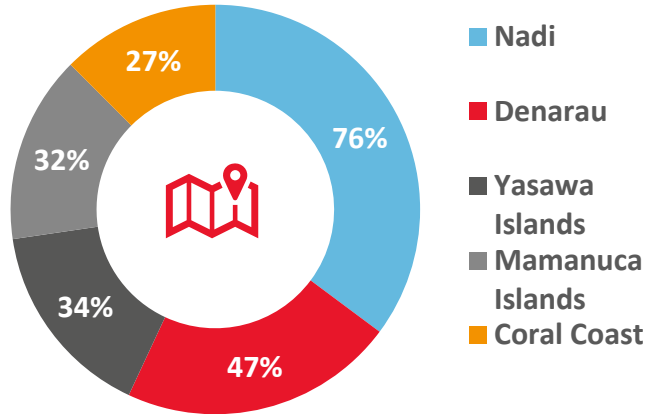


Many Europeans came as couples (48%) but also solo travelers (37%). Almost all were first-timers to Fiji. Internet searches and to a lesser extent travel websites and guidebooks provided planning information for this trip. Fiji appealed to those looking for a new adventure and as an aspirational destination to some. Spectacular landscapes were also a draw

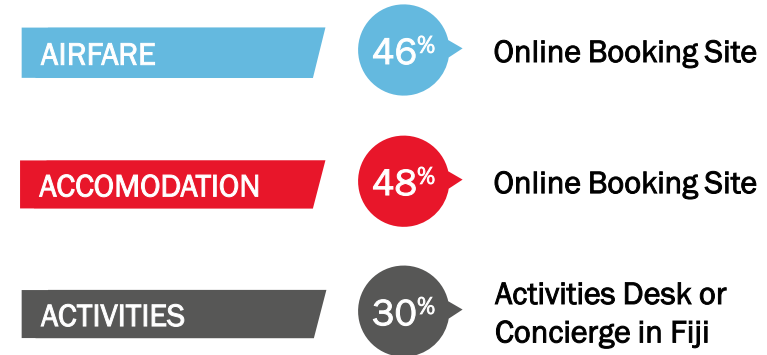
\*Multiple responses, therefore totals do not add up to 100%



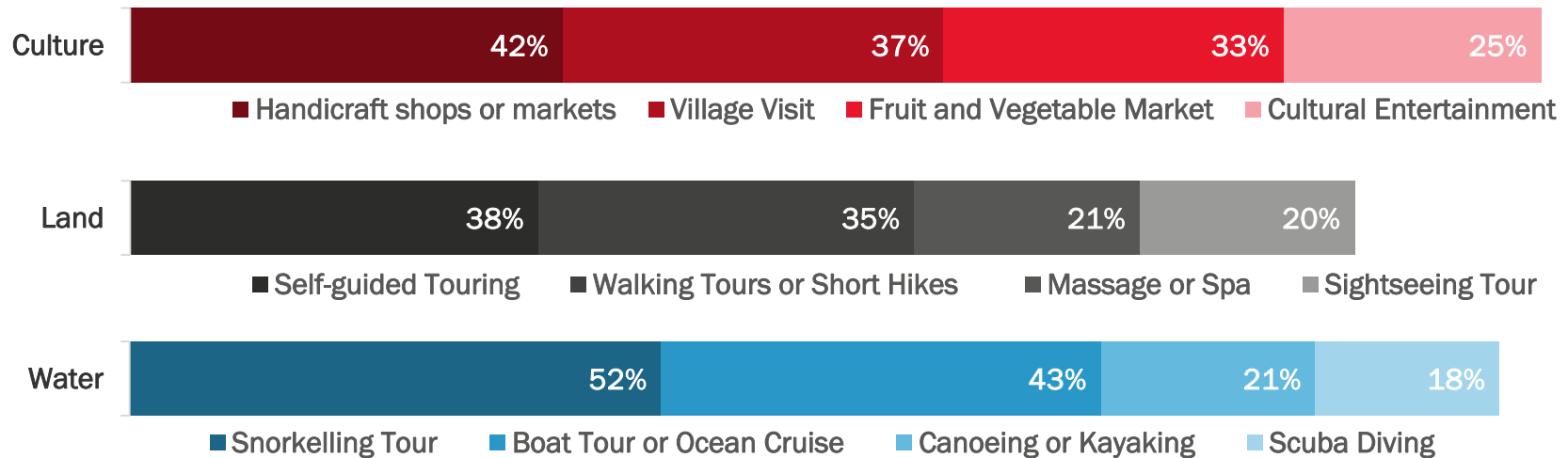
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES\*



Europeans favored the island resorts including Yasawa and Mamanuca. Online booking was the preferred method of booking for airfare and accommodations for more than half of the visitors. Many Europeans took on water activities.

\*Multiple responses, therefore totals do not add up to 100%



51,132

TOTAL VISITORS

FJD 186M

TOTAL SPEND

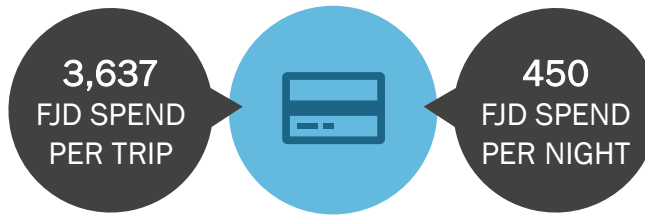
FJD 145M

PRE-PAID SPEND

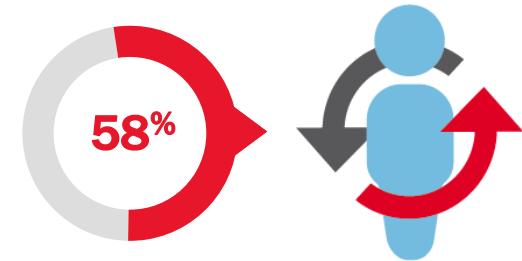
AVERAGE LENGTH OF STAY



SPEND



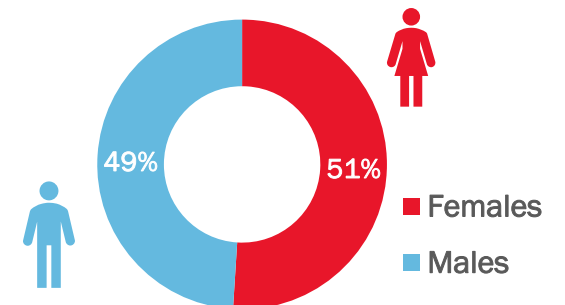
SATISFACTION



AGE OF ALL VISITORS

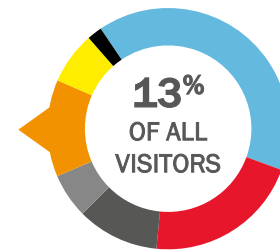


GENDER

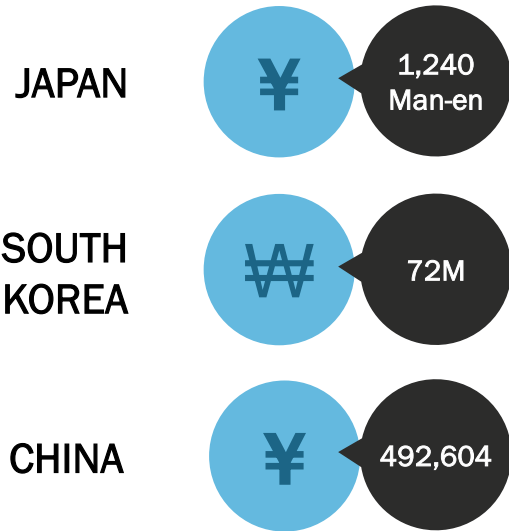


Note: Sample size is relatively small

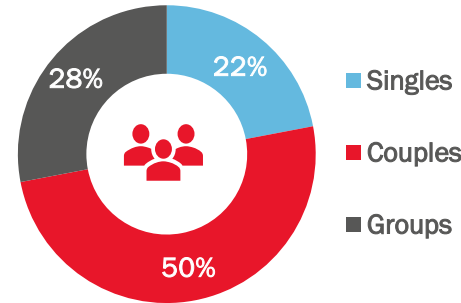
The Asian market, including the countries of Japan, South Korea, China, Hong Kong and India, accounted for 13% of visitors and arrivals grew by +13%. This growth was attributed to the strong growth from Hong Kong and Japan. Daily spending (\$450 per person per night) was the highest among the major markets with much of the spending done before arrival.



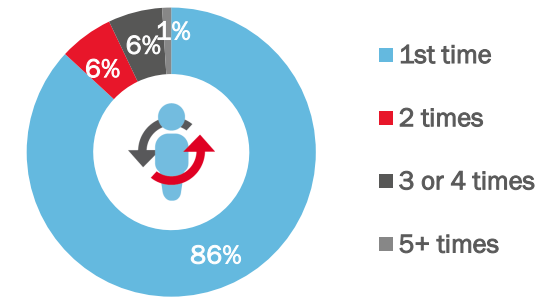
ANNUAL HOUSEHOLD INCOME



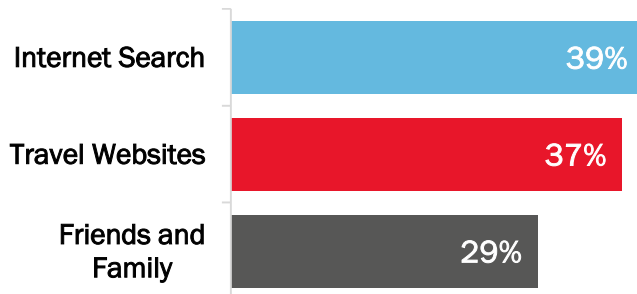
PARTY SIZE



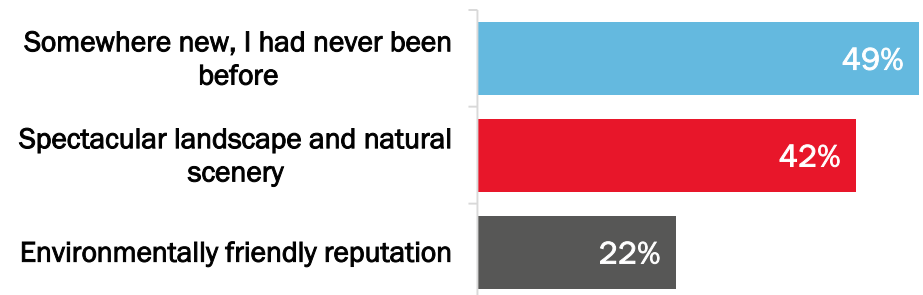
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING\*



TOP INFLUENCING FACTORS FOR VISITING\*



Overall, Asian visitors travelled as couples and most were first timers. Internet searches and travel websites were top sources for planning information. Visitors who came to Fiji were seeking a new destination with spectacular landscape and scenery. Fiji's eco-friendly reputation also was a factor.

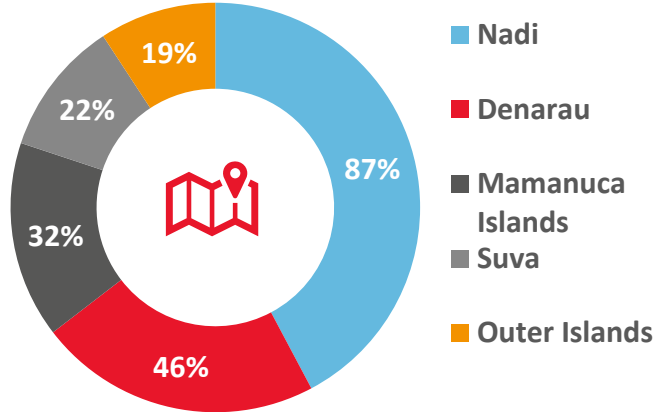
\*Multiple responses, therefore totals do not add up to 100%

Note: Sample size is relatively small

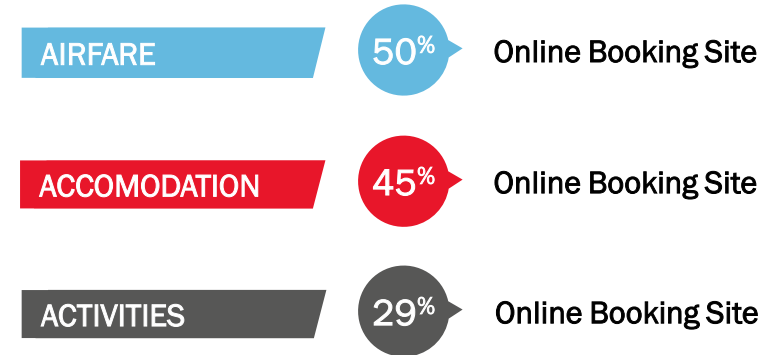




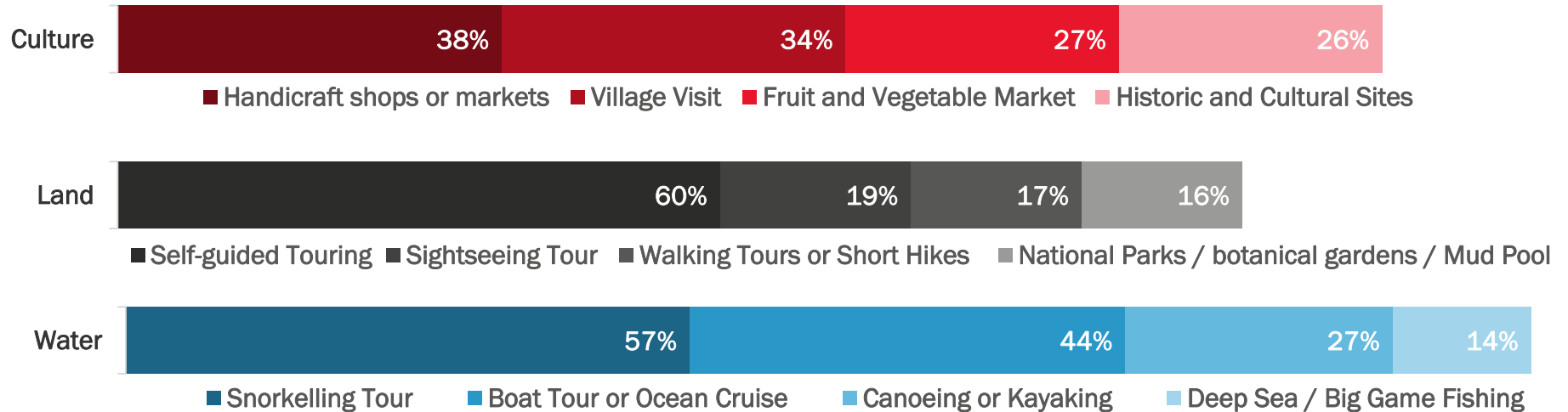
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



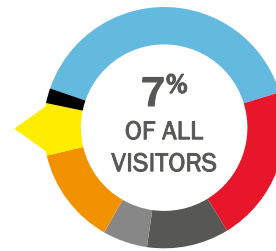
TOP ACTIVITIES\*



\*Multiple responses, therefore totals do not add up to 100%

Note: Sample size is relatively small

Most Asian visitors came to Nadi and visited Denarau and Mamanuca Islands. A sizable number also visited Suva. Online booking sites were the primary method for booking airfare, accommodations and even activities. Visitors were less likely to do cultural activities instead many did self-guided touring. Snorkeling and boat tours were very popular



27,750

TOTAL VISITORS

FJD 70M

TOTAL SPEND

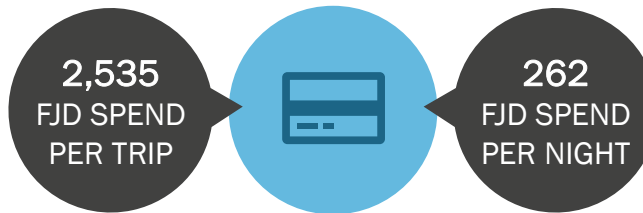
FJD 56M

PRE-PAID SPEND

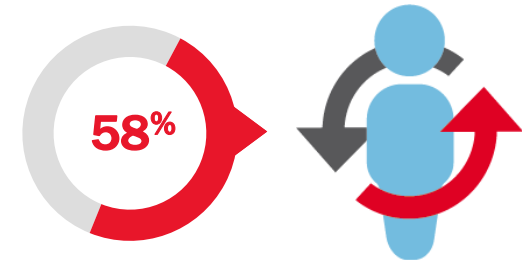
AVERAGE LENGTH OF STAY



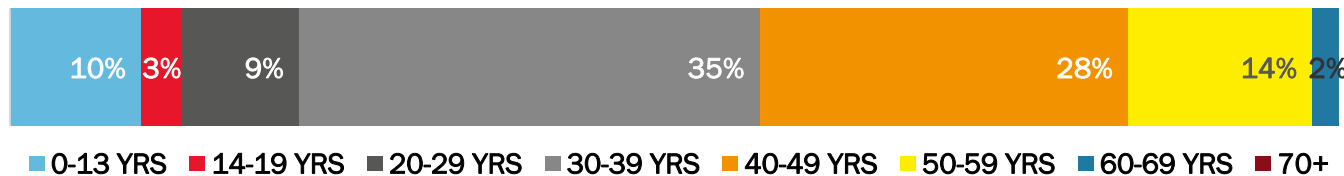
SPEND



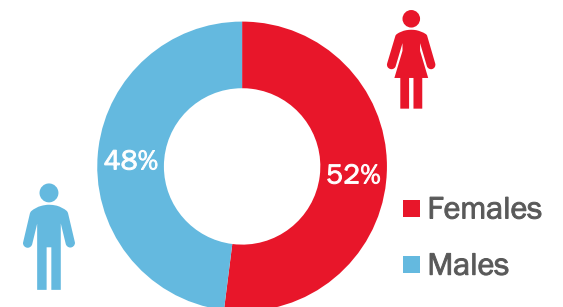
SATISFACTION



AGE OF ALL VISITORS

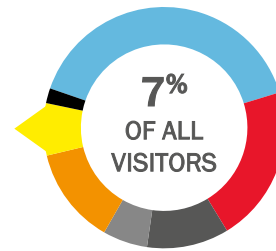


GENDER

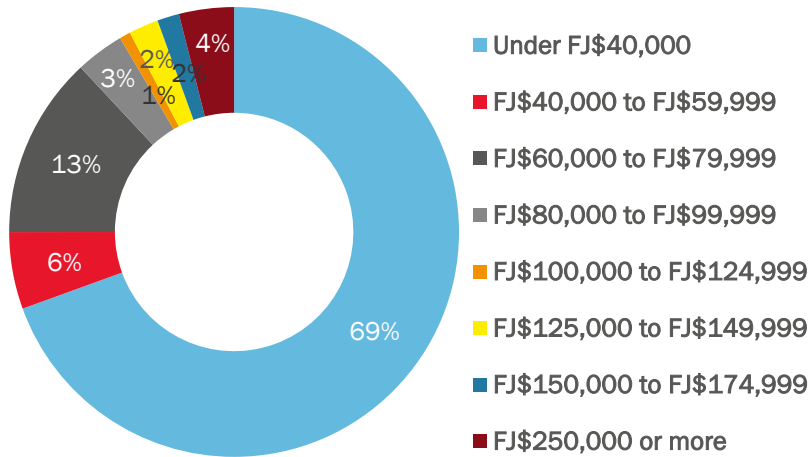


Visitors from nearby Pacific Islands made up only 7% of the total count and therefore, their contribution to visitor spending was the lowest. They spent more time in the islands than the average visitor.

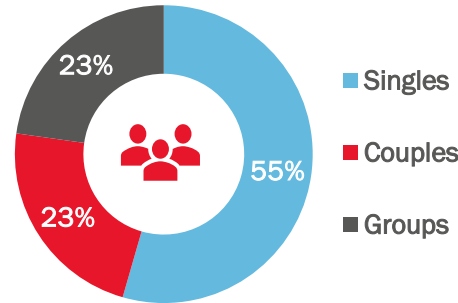
Note: Sample size is relatively small



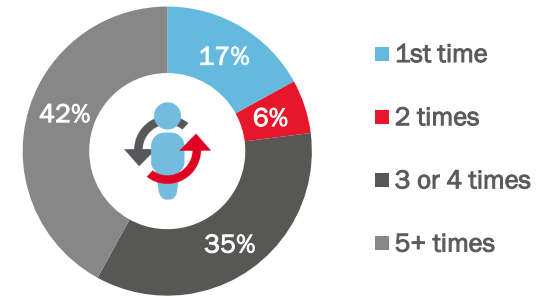
ANNUAL HOUSEHOLD INCOME (FJD)



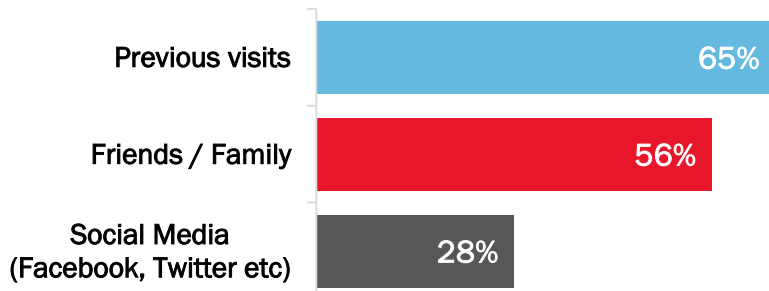
PARTY SIZE



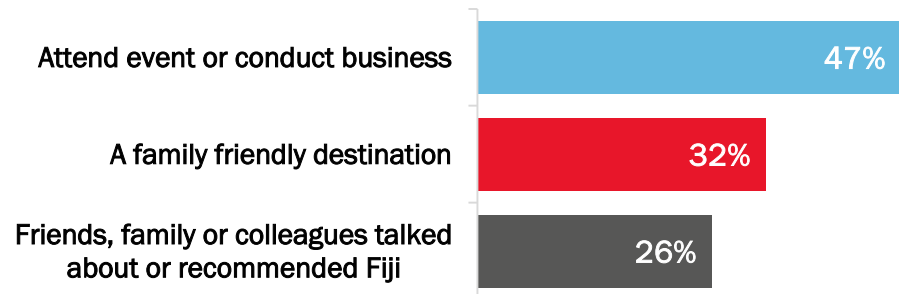
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING\*



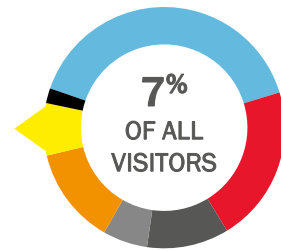
TOP INFLUENCING FACTORS FOR VISITING\*



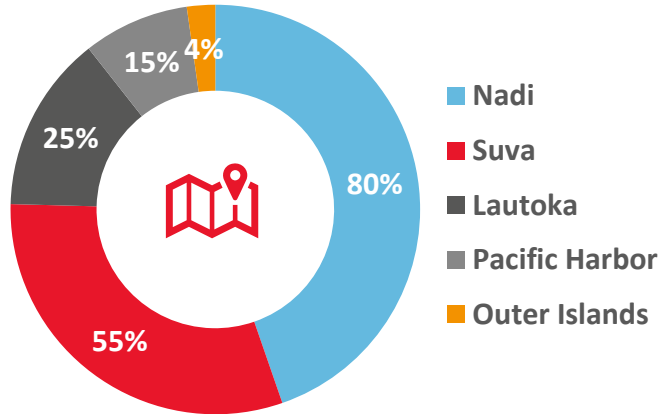
\*Multiple responses, therefore totals do not add up to 100%

Note: Sample size is relatively small

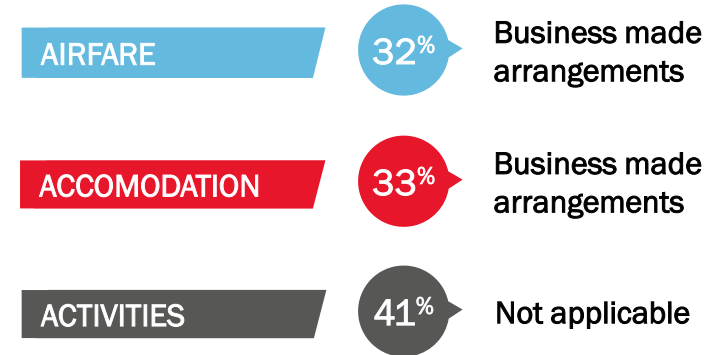
Many Pacific Islanders came on their own and most were repeat visitors. Therefore, they relied on previous visits and friends and family for information sources. Many Pacific Islanders came because of an event or to conduct business. They were also drawn by the family friendliness of Fiji.



TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES\*



\*Multiple responses, therefore totals do not add up to 100%

Note: Sample size is relatively small

Almost all Pacific Islanders went to Nadi and more than half went to Suva. Pacific Islanders did not heavily engage in visitor type activities. If anything, they went to food and handicraft markets. Since many came for business, the booking was done by their work.

A world map where the landmasses are filled with a dark grey, textured pattern of small white dots. The map is centered on the Atlantic Ocean, showing North and South America on the right and Africa, Europe, and Asia on the left. A blue horizontal band is positioned across the middle of the map.

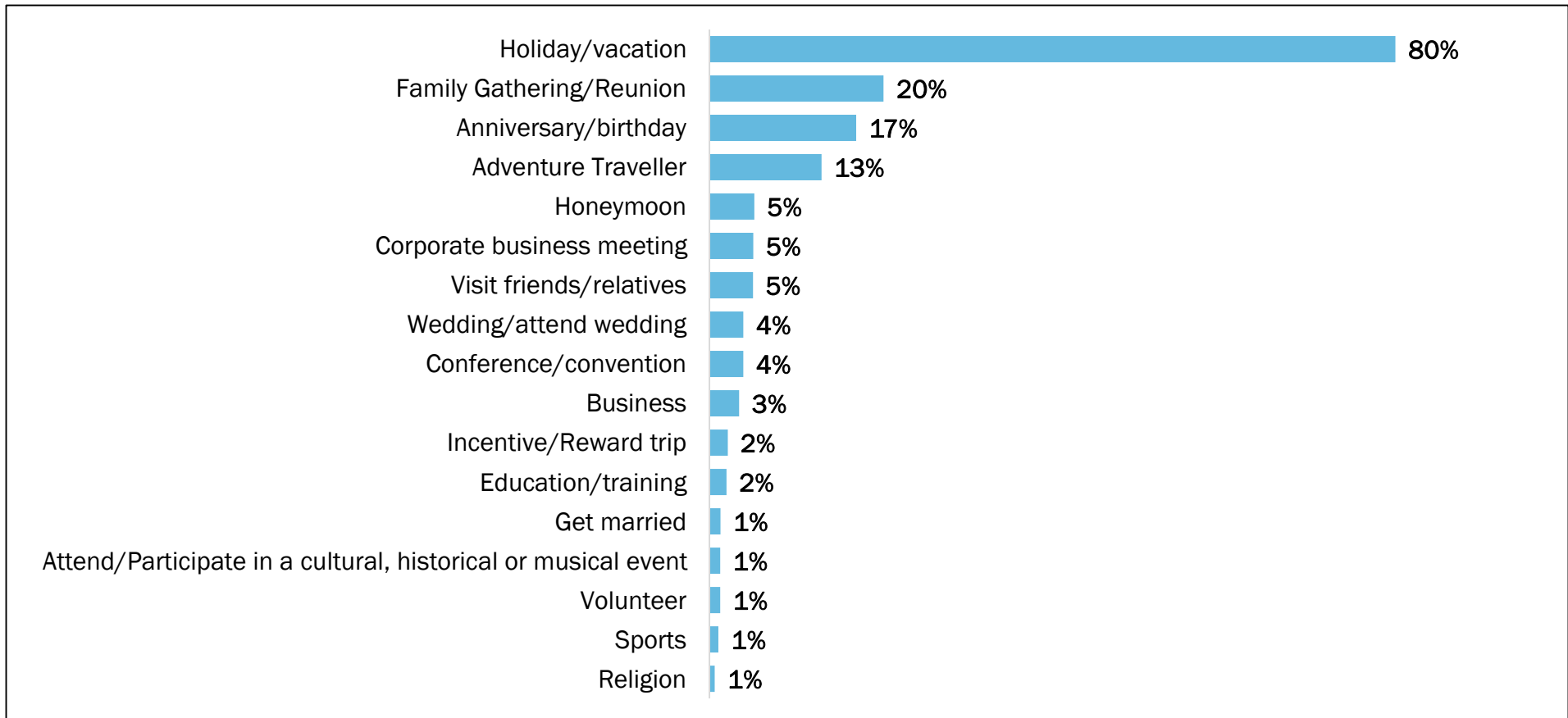
# APPENDIX

A solid red horizontal banner with a white border, positioned below the blue band. It contains the word 'FIJI' in white capital letters and a circular graphic on the right side.

# FIJI



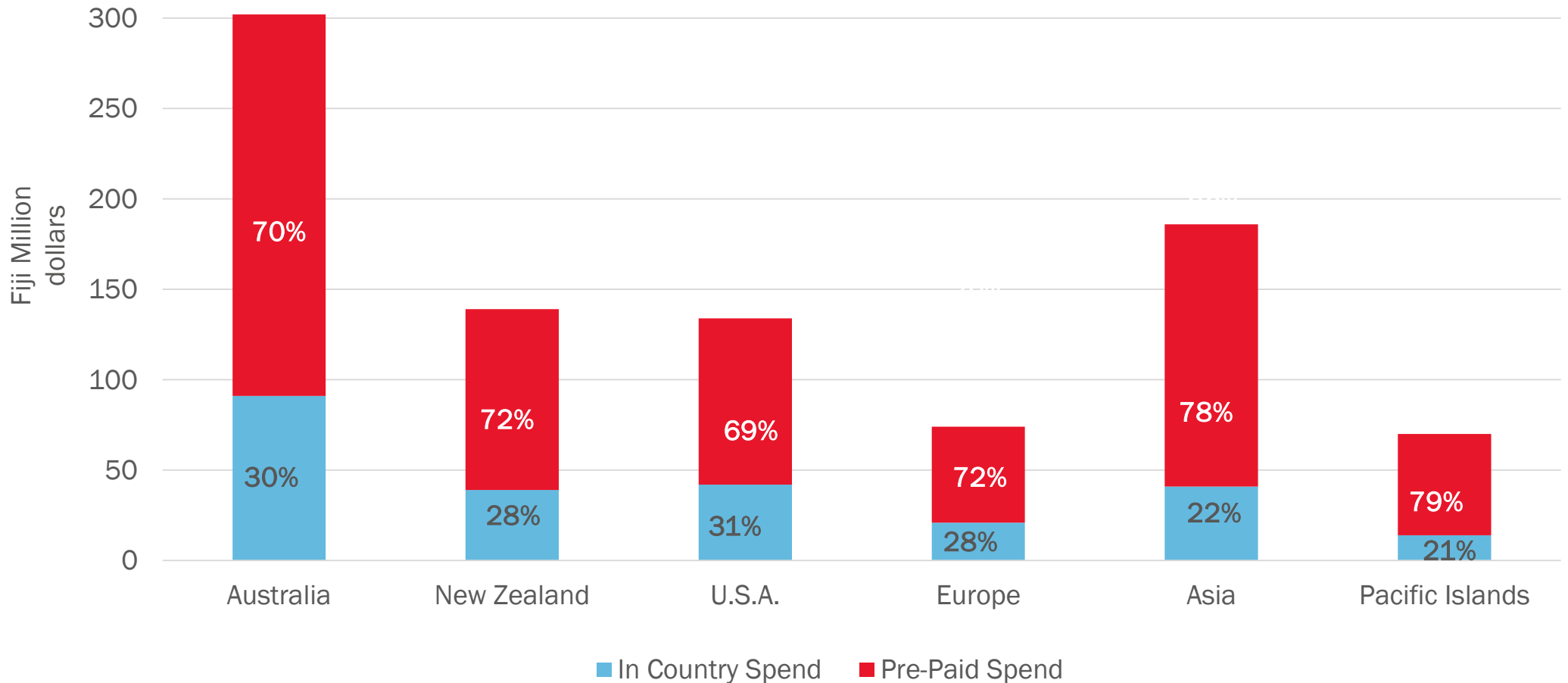
ALL REASONS FOR VISITING FIJI



One-fifth of visitors actually came for the specific purpose of a family gathering or reunion and a similar amount came to celebrate an anniversary or birthday. Adventure travel, including surfing and diving, accounted for 13% of travelers. The honeymoon and wedding niche market was not quite as large (5% for honeymoon, 4% to attend a wedding, or 1% to get married).

Note: Visitors could select more than one purpose of visit, therefore totals do not add up to 100%

Distribution of Pre-paid and In-Fiji Spend



Overall, Australian visitors contributed the most to the Fiji economy (32% of total spend). Americans (14%) spent a similar amount to New Zealand (15%), though there were less American visitors. All together the Asia markets also had a large contribution, at 20% of total spend, though most spending was done through pre-paid packages.



**13,725**

TOTAL NUMBER OF EMAILS SENT



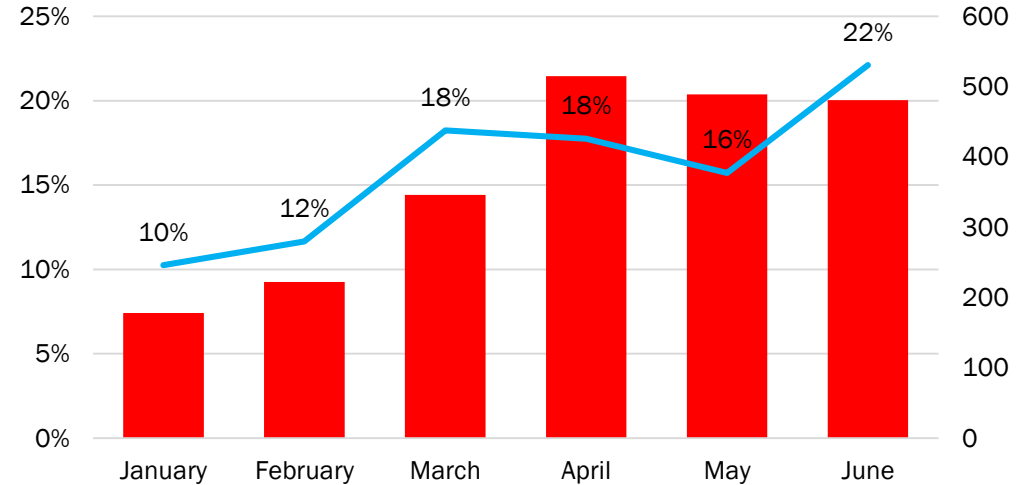
**2,231**

TOTAL NUMBER OF RESPONSES

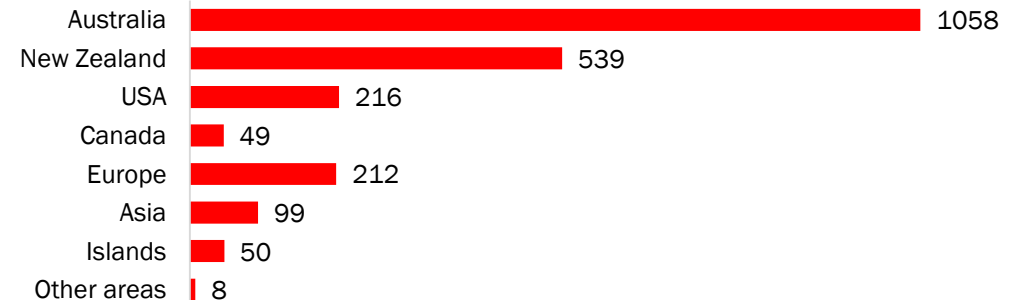
**16.3%**

RESPONSE RATE

Response Rate and Surveys Collected for 2019



Valid Complete Surveys



Email address collection began in January 2019 and the initial questionnaire was launched in March 2019, resulting in lower response rates for the first two months. As data collection at the Nadi International Airport has improved, the partners has also seen higher numbers of completed surveys. The partners continues to work on ways to increase the number of email addresses collected, which will increase the overall sample size.

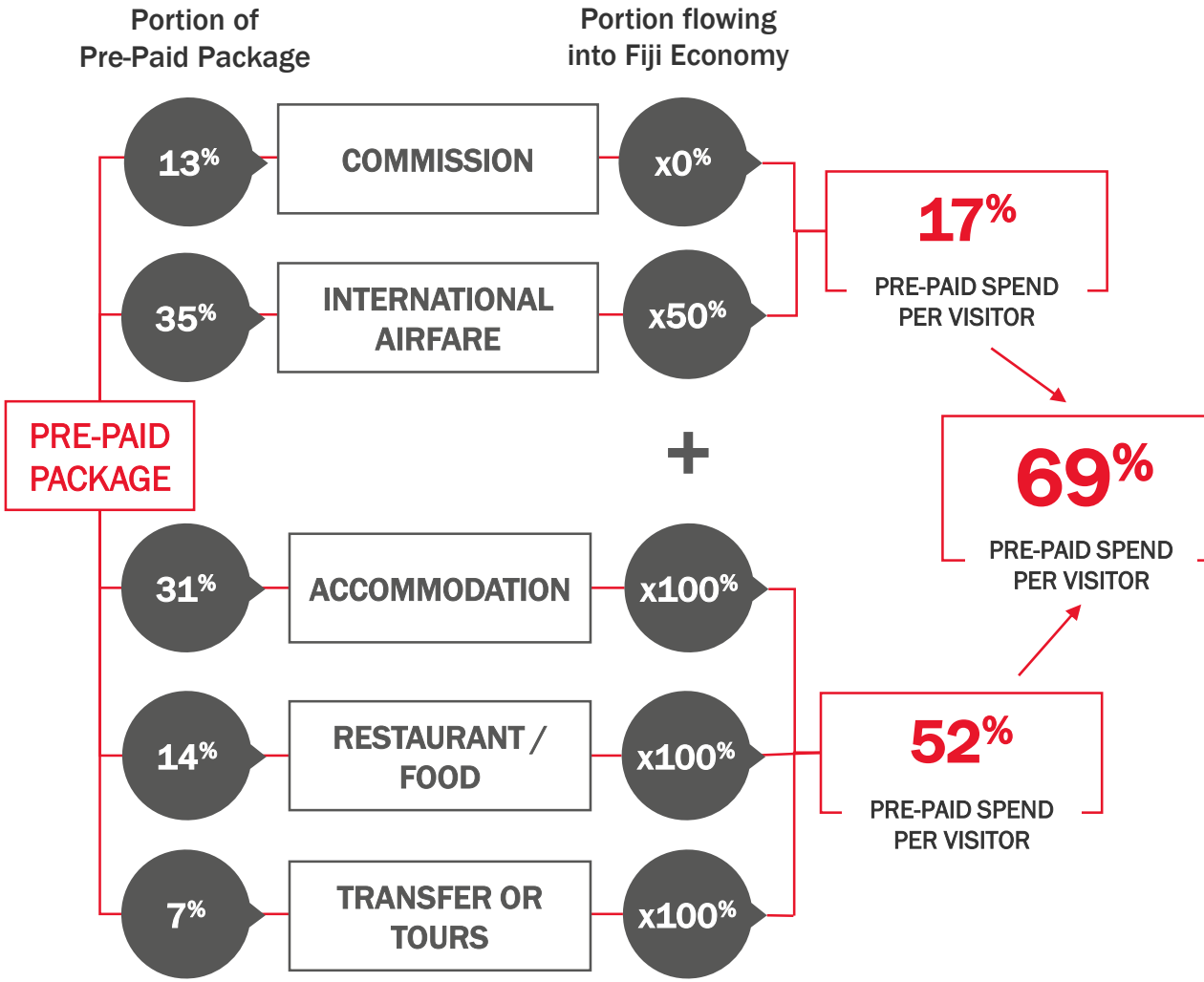


✓ A portion of pre-paid expenses for package tours and international airfare is allocated to tourism spend in country versus pre-paid spend that stays with international businesses such as outbound tour operators. Spend is disaggregated using a series of assumptions based on industry research.

✓ For respondents that select that they pre-paid international airfare, 50% of this pre-paid spend is allocated to total tourism spend flowing into the Fiji economy.

✓ For respondent that select that they spend on a pre-paid tour package, they are asked what that package included. Based on the response, the amount of pre-paid spend is allocated into the categories as represented in the graph.

✓ Then a portion of spend in each category is allocated to total tourism spend flowing into the Fiji economy, with the remainder allocated to spend staying with international businesses.





Data users are advised to consider carefully the provisional nature of the information and data before using it for decisions that concern the conduct of business involving substantial monetary or operational consequences. Unless otherwise stated, all reported figures are provisional and subject to periodic review. Inaccuracies in the data may be present because of instrument and/or malfunctions or human error at data collection. Subsequent review may therefore result in revisions to the data. Information concerning the accuracy and appropriate uses may be obtained by contacting the Ministry of Industry, Trade and Tourism of the Government of the Republic of Fiji.



Prepared by SMS Research & Marketing Services, Inc.

FIJI



IFC's work in Fiji is supported by the governments of Australia and New Zealand under the Fiji Partnership. Australia, New Zealand and IFC are working together under the Partnership to unlock private sector investment, promote sustainable economic growth and boost shared prosperity in Fiji.

