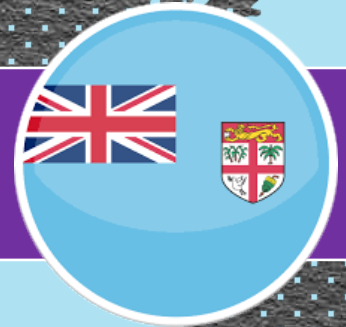


INTERNATIONAL VISITOR SURVEY

FIJI



2023 Report for April – December 2022
Published July 2023



**Ministry of
Tourism and
Civil Aviation**



IFC

**International
Finance Corporation**
WORLD BANK GROUP

Creating Markets, Creating Opportunities

**Australian
Aid**



SIIS

2019 INTERNATIONAL VISITOR SURVEY



The **2019 Fiji International Visitor Survey** is an initiative of the Ministry of Commerce, Trade, Tourism and Transport (MCTTT) with the support of the International Finance Corporation (IFC), the private sector arm of the World Bank Group. 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 **2019** calendar year. Unless otherwise stated, all reported figures are provisional and subject to periodic review.



Reproduction of Material

Information contained within this publication, including all charts, information and graphical representations, may be used, reproduced or published without MCTTT's prior approval. However, the information source must be explicitly referenced and acknowledged in all modes of representation.

Note: This report is the second in a series of IVS reports for 2019. In the January – June 2019 Interim report, satisfaction rates and rates of likelihood to recommendation Fiji were presented as the percent of visitors who selected 9 to 10 on a scale where 1=Not at all satisfied/not at all likely to recommend and 10=Extremely satisfied/extremely likely to recommend. In this presentation, the calculation was updated to include the percent of visitors who selected 7 to 10 on the same scale in order to be comparable with international visitor surveys from other Pacific destinations.

2022 INTERNATIONAL VISITOR SURVEY



The **2022 Fiji International Visitor Survey** is an initiative of the Ministry of Tourism and Civil Aviation (MTCA) with the support of the International Finance Corporation (IFC), the private sector arm of the World Bank Group. The survey was last fielded in 2019 due to COVID-19's impact on international travel to Fiji in 2020 and 2021.



This report is a final report with data from the April-December period of the 2022 calendar year. Unless otherwise stated, all reported figures are provisional and subject to periodic review.



Reproduction of Material

Information contained within this publication, including all charts, information and graphical representations, may be used, reproduced or published without MTCA's prior approval. However, the information source must be explicitly referenced and acknowledged in all modes of representation.

2022 INTERNATIONAL VISITOR SURVEY METHODOLOGICAL NOTE



The 2022 IVS was launched in April 2022 and ran through December 2022. This report makes comparison to results from 2019 where applicable, but there are some metrics where comparisons cannot be made due to inconsistencies in the length of time the two surveys were fielded. Expenditure data reflects the number of visitors who arrived during these nine months, not for the whole year. All spending figures are denoted in Fijian dollars (FJD) unless otherwise noted.



The survey instrument used in 2022 was similar, but not exact, to the survey instrument used in 2019. New questions were added, a handful of existing questions were removed, and the response options for some questions were altered. In those instances where comparisons cannot be made, we report only the results for 2022.



All weighting of the data is based on the number of arrivals each month (2022) by major market areas.



The sample sizes for residents from Major Market Areas (MMA) demonstrated variation from 2019 to 2022, due in part to fact that many of these markets were closed off to and from international travel. For example, there were very few residents from Japan and China who visited Fiji and subsequently completed the IVS. As a result of the small sample sizes, for this report we were unable to separate Japan and China as distinct MMAs, and instead aggregated all respondents from Asia into an “All Asia” market area.



The dataset includes a significantly smaller monthly sample size for October due to an electronic crash in the database of emails used to contact visitors. The data loss resulted in fewer visitors receiving invitations to take the IVS and thus fewer surveys completed.

2022 INTERNATIONAL VISITOR SURVEY HIGHLIGHTS



Fiji welcomed 636,312 international visitors in 2022, or about 71% of the 894,389 visitors who arrived in 2019.



In 2022, visitors from Australia, New Zealand and the U.S. comprised 89% of all visitors.



Australian arrivals comprised 54% of all arrivals in 2022, compared to 41% in 2019. By contrast, visitors from Asia accounted for 3% of arrivals in 2022, compared to 11% in 2019.



Expenditure patterns in 2022 differed from 2019. Expenditures per person per night and per person per trip were about 6% higher in 2022 compared to 2019.



Visitors in 2022 spent more on post-arrival goods and services than pre-arrival goods and services, which is opposite to the findings from 2019. The data suggest the increase is due in part to a significant increase in expenditures on lodging and accommodations.

2022 INTERNATIONAL VISITOR SURVEY HIGHLIGHTS



Visitors stayed about 9.5 nights per trip, which is nearly identical to 2019 (9.6 nights per trip).



Most visitors came as either couples (41%) or groups (40%), and just over half (53%) were first-time visitors. Just under half (47%) arrived on a pre-paid package trip.



Almost all visitors (92%) stayed at a hotel/resort, and 84% indicated they came on holiday/vacation.



As was the case in 2019, in terms of visitor days, most visitors spent time in Denarau, the Coral Coast, Nadi, and the Mamanuca Islands.

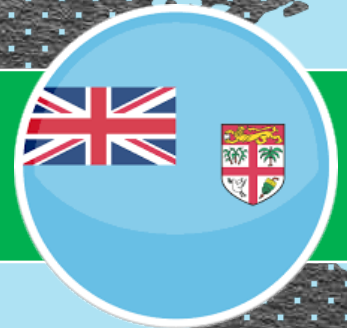


Overall satisfaction was at 93%, compared to 89% in 2019. Over nine in ten visitors (92%) indicated they would recommend a visit to their friends and family, compared to 88% in 2019. Additionally, 81% of visitors (compared to 68% in 2019), indicated they would be likely to visit Fiji again in the next 5 years.

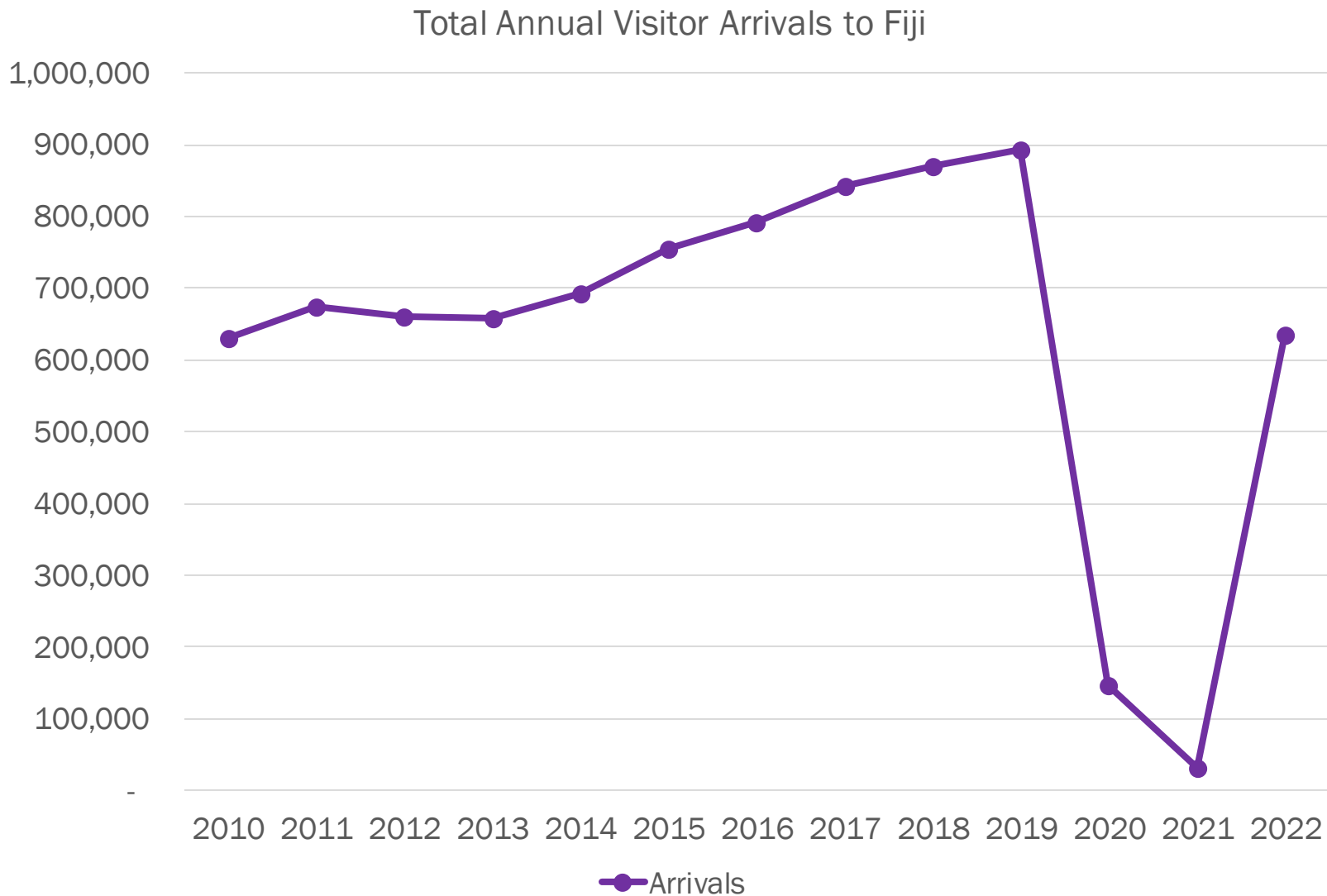
Note: In order to be comparable with international visitor surveys from other Pacific destinations and previous IVS results, satisfaction and rates of likelihood to recommendation Fiji are presented as the percent of visitors who selected 7 to 10 on a scale where 1=Not at all satisfied/not at all likely to recommend and 10=Extremely satisfied/extremely likely to recommend.

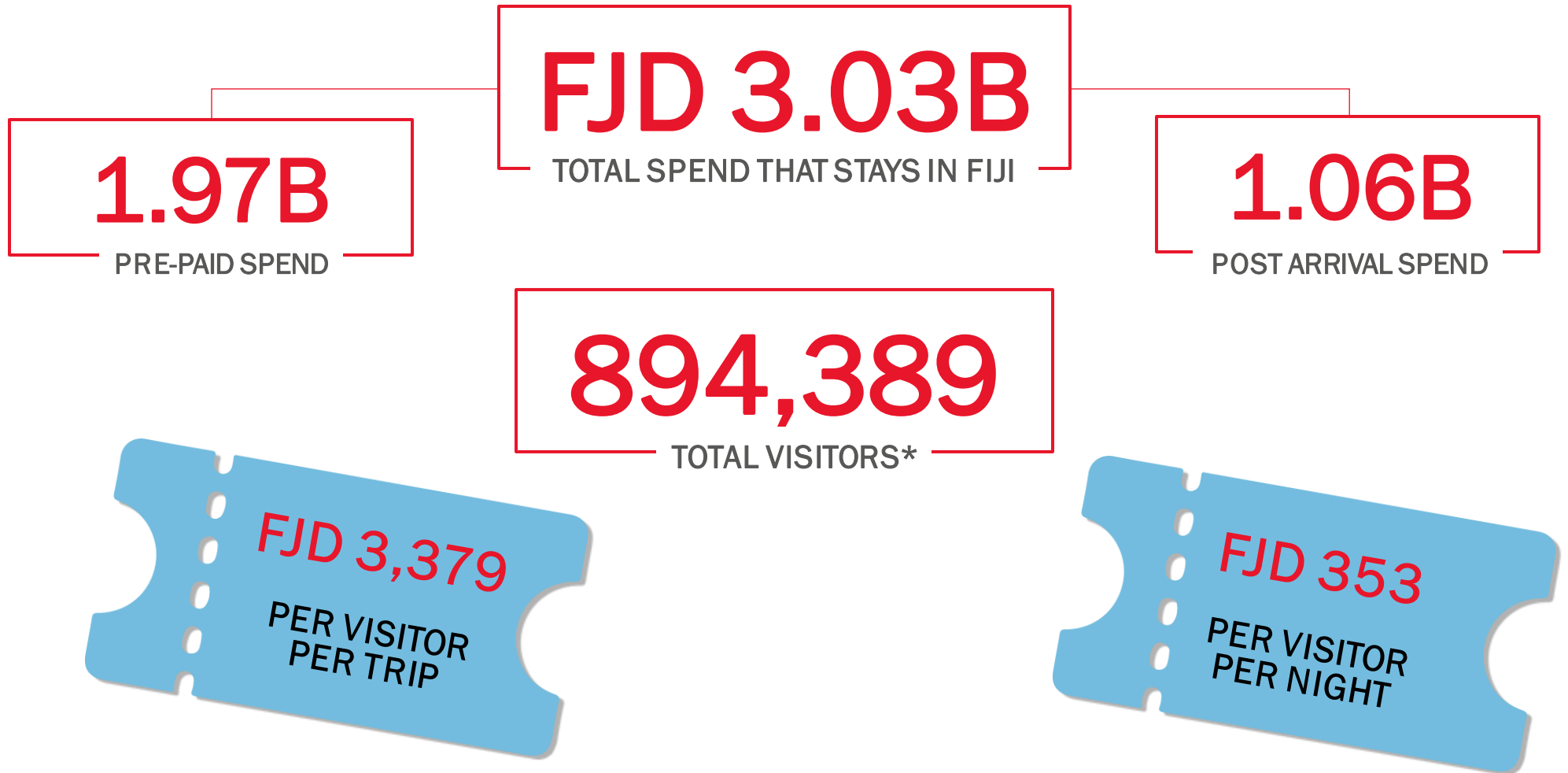
TOTAL VISITORS CHARACTERISTICS

2019 & APR-DEC 2022



ANNUAL VISITOR ARRIVALS 2010 - 2022





Total visitor arrivals in 2019 increased +2.8% over the same period last year amounting to 894,389 visitors. The spending by visitors totalled to FJD 3.03 billion with two-thirds of purchases being made before arrival (\$1.97B) and one-third while in Fiji (\$1.06B). The average visitor spent FJD 353 per visitor per night or approximately FJD 3,379 per person per trip (average length of stay 9.6 nights).

Total Visitors exclude Fiji Residents and Persons In-Transit. 2019 spending figures are not comparable to previous years due to a change in methodology similar to other Pacific nations: Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare - See Appendix.

* Based on official immigration statistics

968M

PRE-PAID SPEND

FJD 2.09B

TOTAL SPEND THAT STAYS IN FIJI

1.130B

POST ARRIVAL SPEND

587,406

TOTAL APR-DEC 2022 VISITORS*

636,312

TOTAL 2022 VISITORS*

FJD 3,572

PER VISITOR
PER TRIP

FJD 376

PER VISITOR
PER NIGHT

636,312 visitors arrived in Fiji in 2022, compared to 894,389 in 2019, the last full year prior to COVID. From April to December 2022, 587,406 visitors arrived and contributed 2.098B FJD to the economy. Approximately 46% of spending occurred prior to arrival (~968M FJD) and approximately 54% of spending occurred after arrival (~1.1B FJD). By contrast, in 2019 about 66% was spent prior to arrival and the remaining 34% was spent after arrival. The average visitor spent 376 FJD per night (compared to 353 FJD in 2019), and 3,572 FJD per trip (up from 3,379 FJD in 2019).

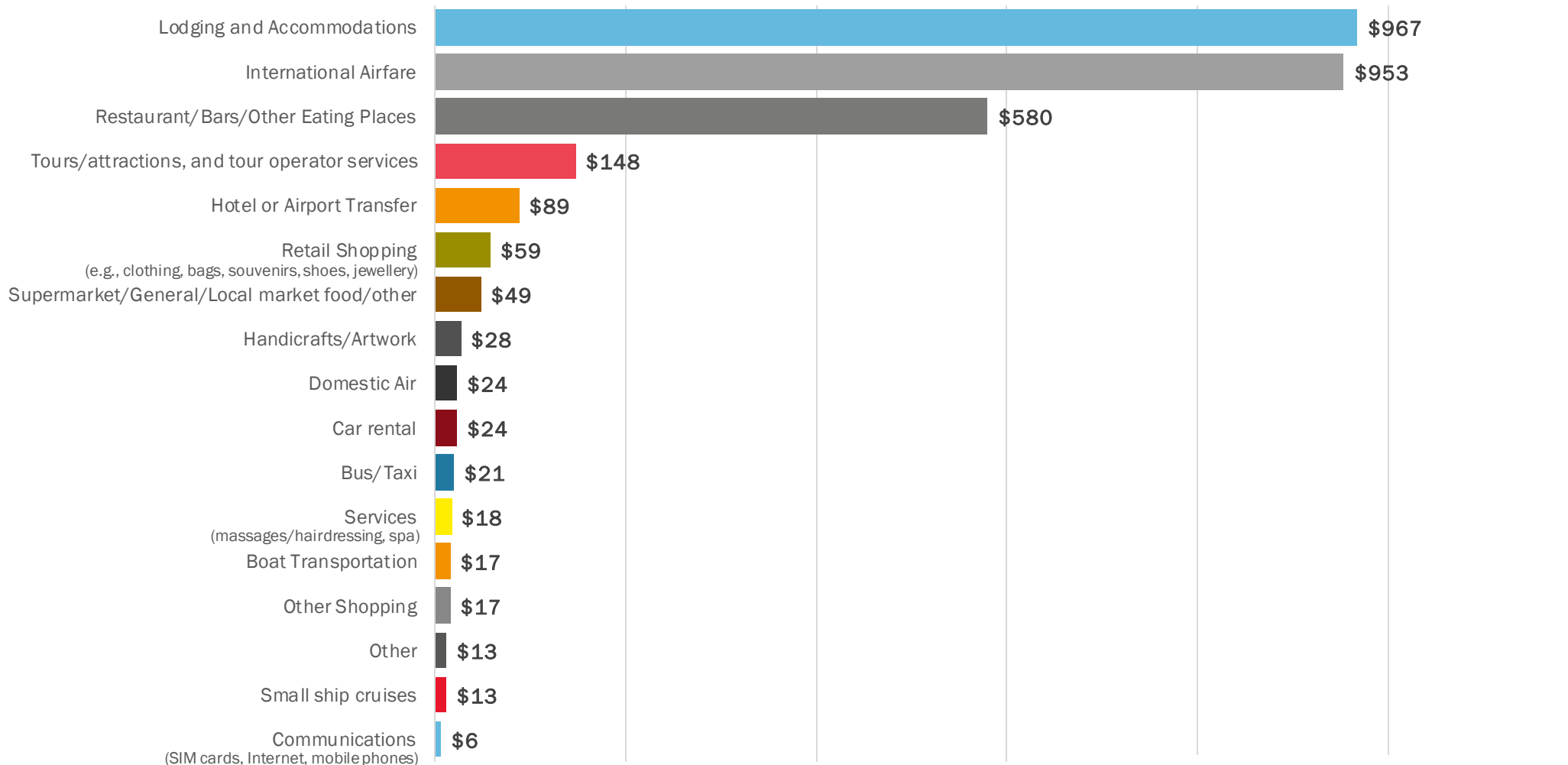
Total Visitors exclude Fiji Residents and Persons In-Transit. Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare - See Appendix.

* Based on official immigration statistics

SUMMARY OF KEY FINDINGS: VISITOR SPEND

2019 TOTAL VISITORS

Total Spend (FJD million)



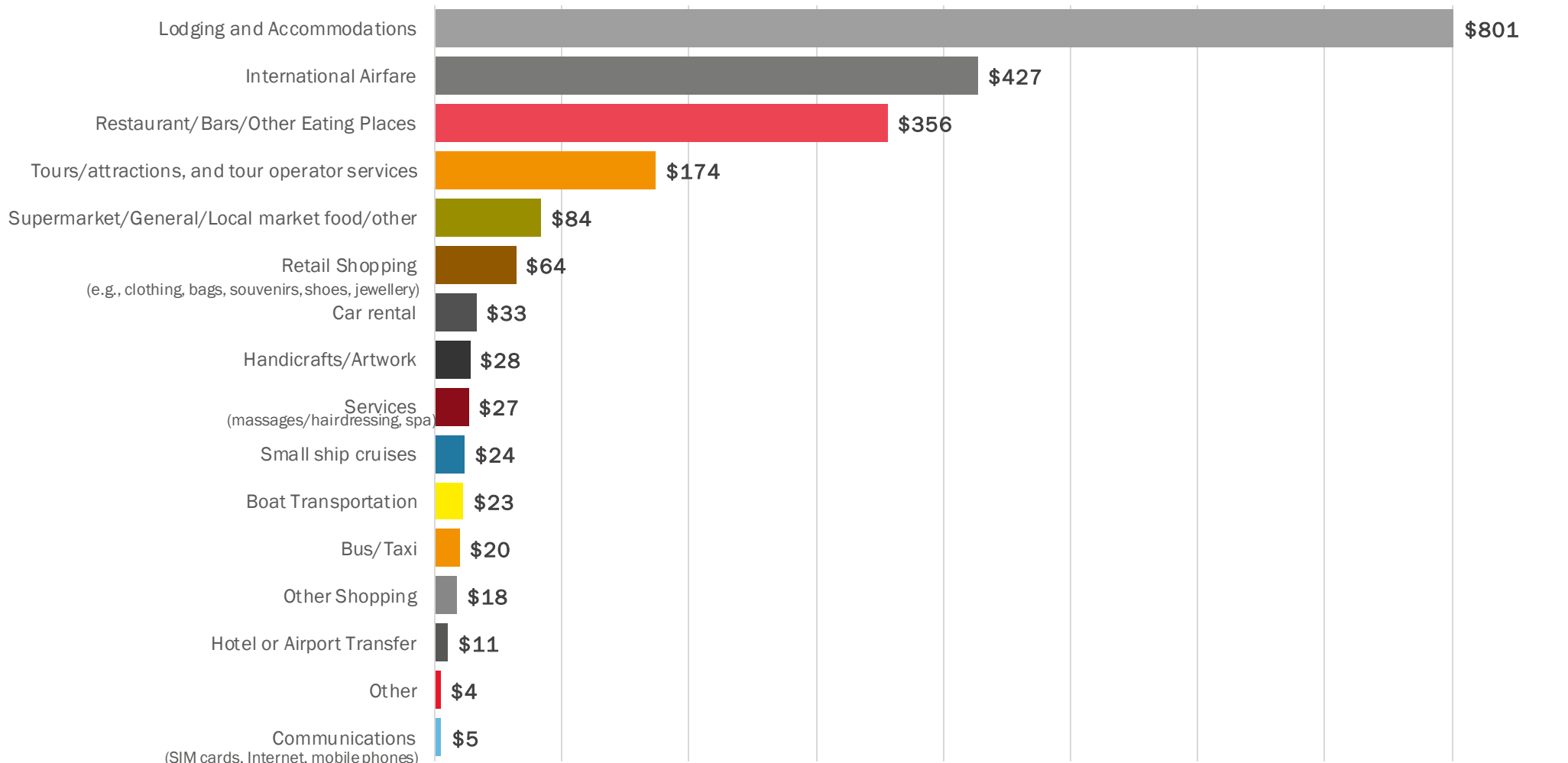
The largest contribution to Fiji's economy came from spending on Lodging, \$967 million or 32% of total spending. Another 32% (\$953 million) was attributed to International Airfare and 19% (\$580 million) on Restaurant and Bars, particularly through meals included in pre-paid packages. Total Shopping (Retail, Handicrafts, Communications, Services, Other Shopping) accounted for \$129 million (4%).

Components of any pre-paid trip packages (pre-arrival trip spending) have been disaggregated and distributed among the categories listed on the chart. 2019 spending figures are not comparable to previous years due to a change in methodology similar to other Pacific nations: Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare - See Appendix.

SUMMARY OF KEY FINDINGS: VISITOR SPEND

2022 APR-DEC VISITORS

Total Spend (FJD million)



The distribution of spending by category highlights the disproportionate increase in post-arrival spending from 2019 to 2022. Visitors reported spending 801M FJD in lodging and accommodations in 2022, which accounted for about 38% of total spending (compared to 32% of total spending in 2019). International airfare accounted for 20% of total spending in 2022, compared to 32% in 2019. Visitors reported spending \$148 million FJD in tours/attractions for all of 2019, but in the nine months of 2022 spent \$174 million FJD. Visitors spent a comparable proportion on restaurants and bars in 2022 (17%) as they did in 2019 (19%).

Components of any pre-paid trip packages (pre-arrival trip spending) have been disaggregated and distributed among the categories listed on the chart. Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare - See Appendix.

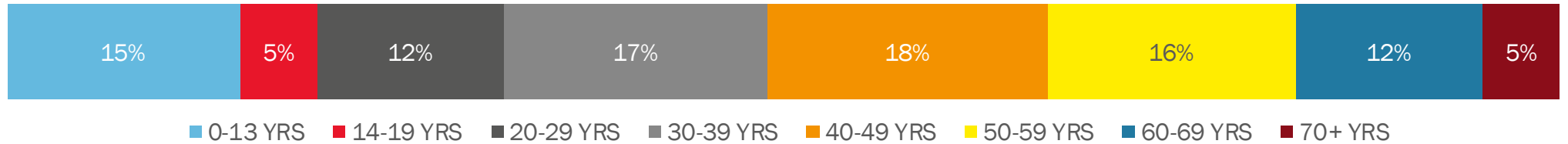
TOTAL VISITORS DEMOGRAPHICS

2019 TOTAL VISITORS

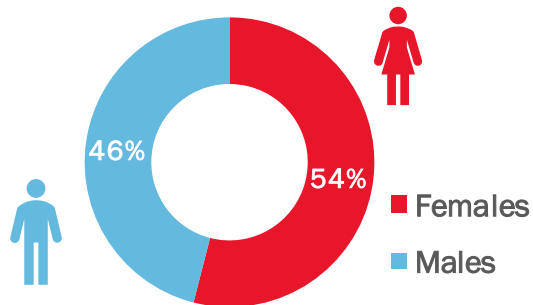
TOTAL VISITORS (%) BY SOURCE MARKET*



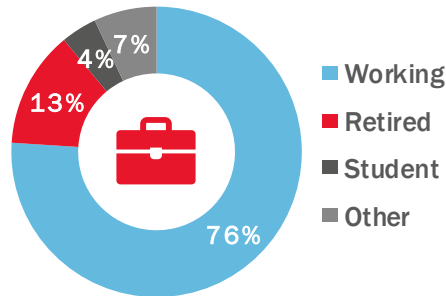
AGE OF VISITORS (%)



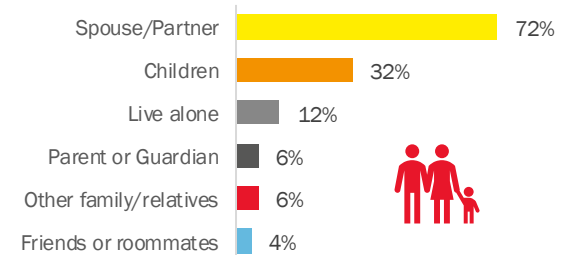
GENDER



EMPLOYMENT STATUS



HOUSEHOLD



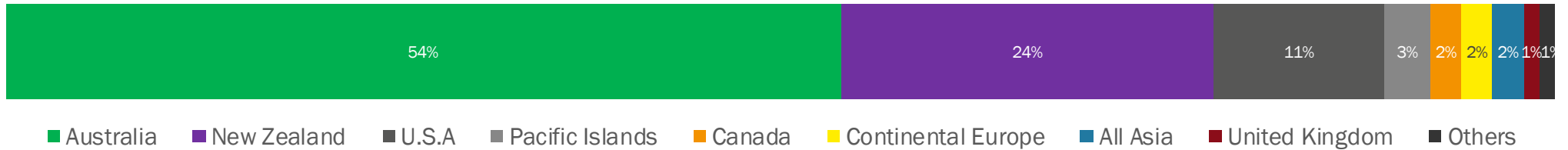
Australia continued to be the largest source for visitors to Fiji (41%). With New Zealand (23%) and USA (11%) a distant second and third. The average age of the party head was between 40-49 years old. Most of these visitors worked full- or part-time, though 13% were retired. Three-quarters of households consisted of at least the visitor and a spouse/partner and one-third of households had children.

*:Based on official immigration numbers

TOTAL VISITORS DEMOGRAPHICS

2022 APR-DEC VISITORS

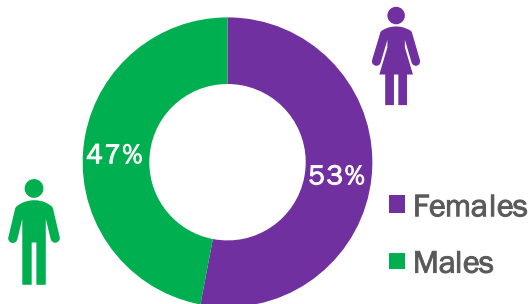
TOTAL VISITORS (%) BY SOURCE MARKET*



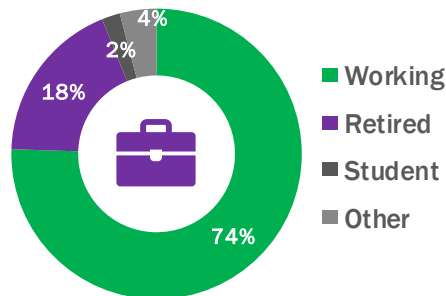
AGE OF PARTY HEAD** (%)



GENDER**



EMPLOYMENT STATUS**



Australian visitors were the largest source of visitors in 2019 (41%) and in 2022 (54%). Visitors from New Zealand (24%) and the U.S. (11%) comprised nearly the same proportion of visitors in 2022 as they did in 2019. In 2022, visitor party heads tended to be older than 50 and women, which was consistent with data from 2019. Almost three-quarters of these respondents indicated they were working, and 18% (up from 13% in 2019) indicated they were retired.

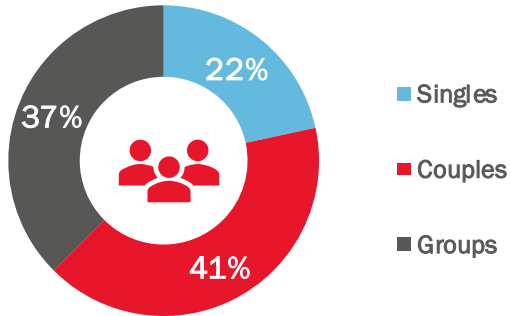
*:Based on official immigration numbers

** Characteristics of survey respondents only 14

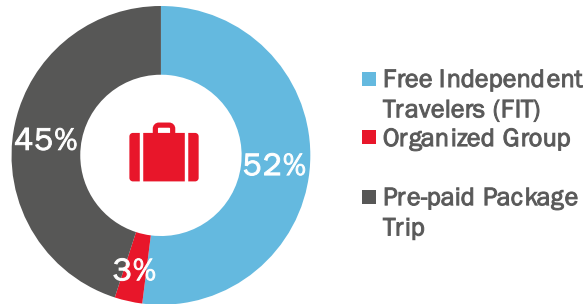
TRIP CHARACTERISTICS

2019 TOTAL VISITORS

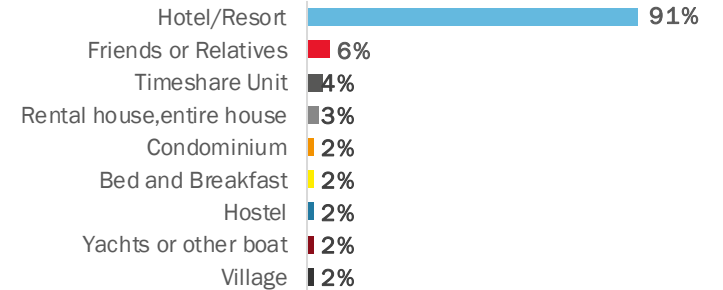
PARTY SIZE



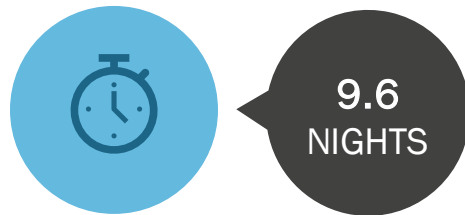
TYPE OF TRAVELERS*



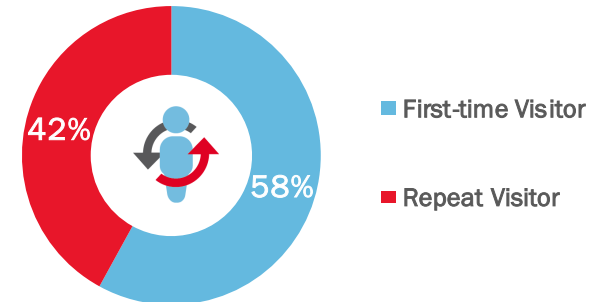
ACCOMMODATION



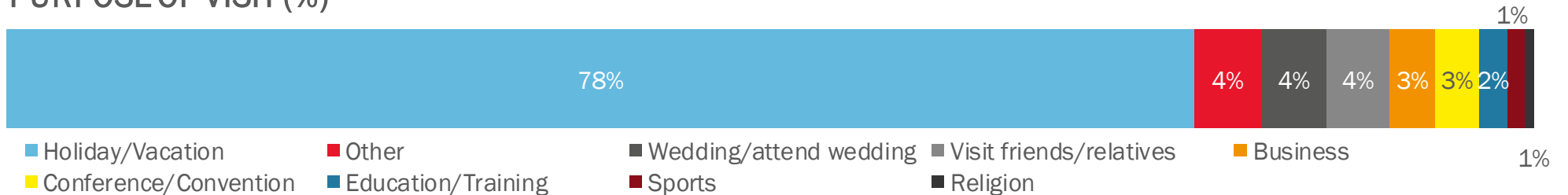
AVERAGE LENGTH OF STAY



NEW OR RETURNING



PURPOSE OF VISIT (%)



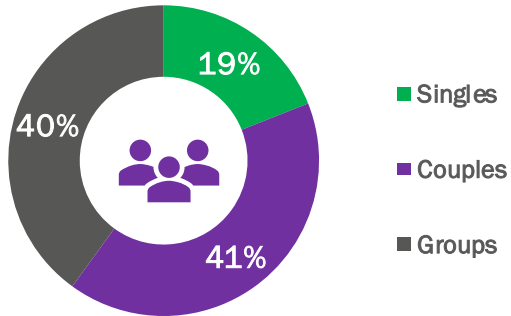
*: Organized group consists of respondents who travelled with a tour or school group, regardless of if they paid for a package trip.

On average, across the entire year, visitors stayed 9.6 nights, and many travelled as pairs (41%). The majority (58%) were first time visitors and just over half planned their own travel (not on an organised trip). Another one-third of visitors came as small groups. Almost everyone (91%) stayed at a hotel or resort. Almost eight-out-of-every-ten visitors came for a holiday or vacation, while other reasons for travel like weddings, visit friends/relatives, or business registered less than 5 percent.

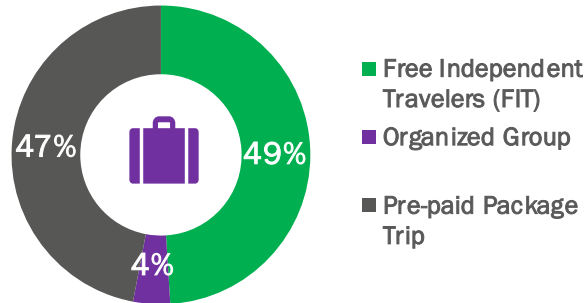
TRIP CHARACTERISTICS

2022 APR-DEC VISITORS

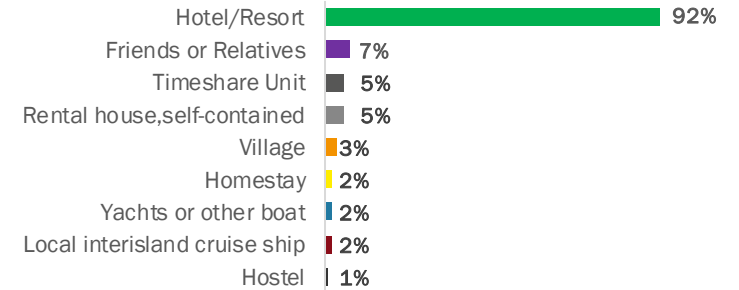
PARTY SIZE



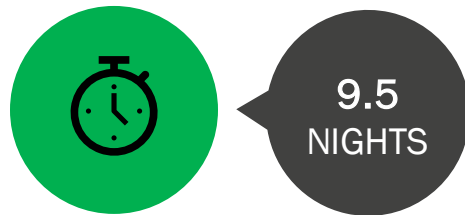
TYPE OF TRAVELERS*



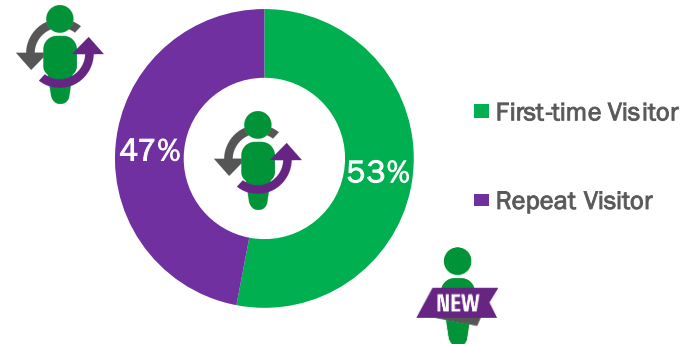
ACCOMMODATION



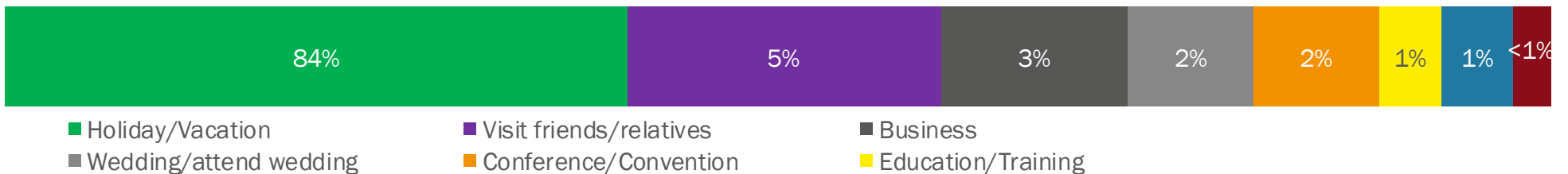
AVERAGE LENGTH OF STAY



NEW OR RETURNING

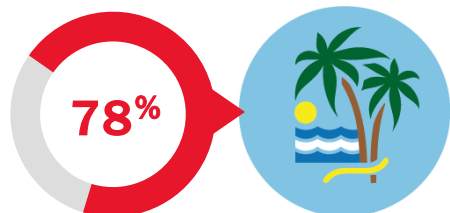


PURPOSE OF VISIT (%)

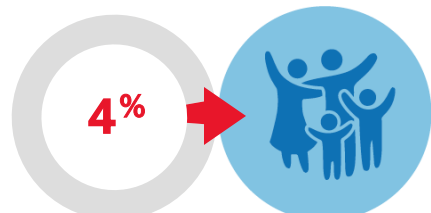


*: Organized group consists of respondents who travelled with a tour or school group, regardless of if they paid for a package trip.

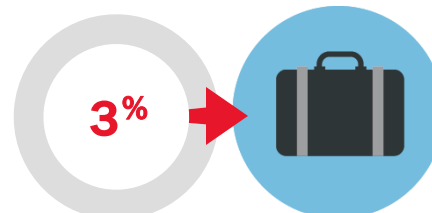
Visitor characteristics in 2019 and 2022 were remarkably similar on several metrics. On average, visitors stayed about 9.5 nights in 2022 (compared to 9.6 nights in 2019); roughly 40% of parties were couples and 40% were groups; and travellers were about evenly split between those who came as part of a pre-paid package and those who were considered free, independent travellers. Similarly, almost everyone (92%) stayed in a hotel/resort while on their visit. On the other hand, in 2022 approximately 53% of visitors were first-time visitors (down from 58% in 2019), and 84% came on holiday/vacation (up from 78% in 2019).



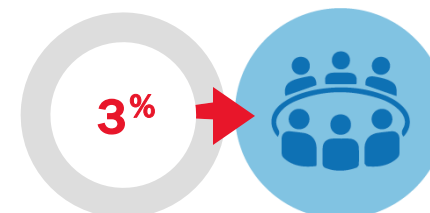
HOLIDAY



VISITING FRIENDS & RELATIVES



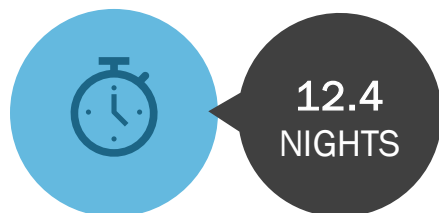
BUSINESS



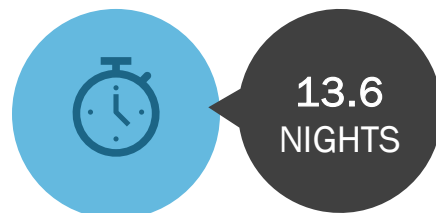
CONFERENCE



AVERAGE LENGTH OF STAY



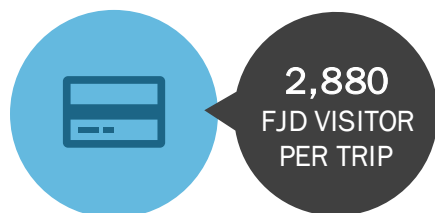
AVERAGE LENGTH OF STAY



AVERAGE LENGTH OF STAY

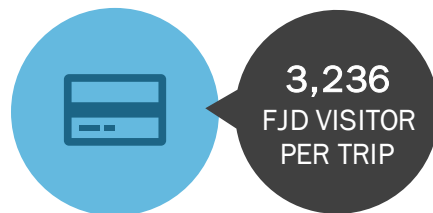


AVERAGE LENGTH OF STAY



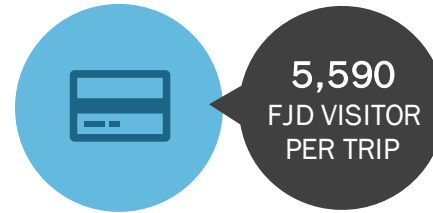
SPEND

360 FJD Per Night



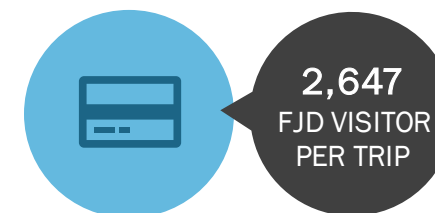
SPEND

261 FJD Per Night



SPEND

411 FJD Per Night

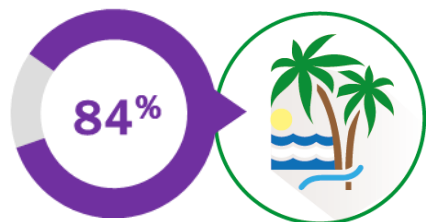


SPEND

427 FJD Per Night

As mentioned previously, most visitors were on a holiday/vacation. Visiting friends and relatives (VFR) accounted for 4% while the combined total of business travellers and those who attended a conference was another 6%. Business travellers spent the most on their trip because of the longer stay. VFR market also stayed long but spent less than business travellers because of lower in-Fiji spending.

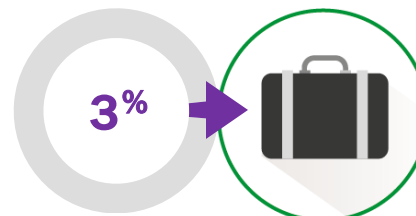
Note: Purpose of visit percentages based on IVS responses not actual immigration data.



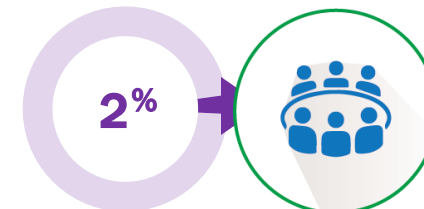
HOLIDAY



VISITING FRIENDS & RELATIVES



BUSINESS



CONFERENCE



AVERAGE LENGTH OF STAY
(Among those on holiday)



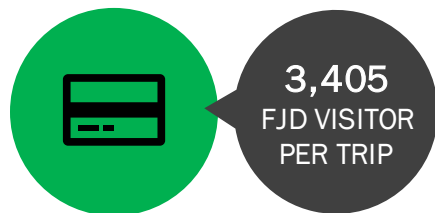
AVERAGE LENGTH OF STAY
(Among those visiting friends and relatives)



AVERAGE LENGTH OF STAY
(Among those on business)

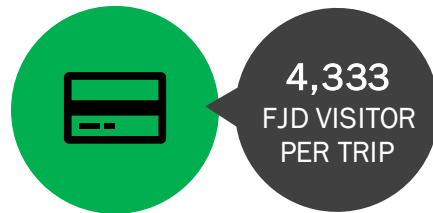


AVERAGE LENGTH OF STAY
(Among those attending conferences)



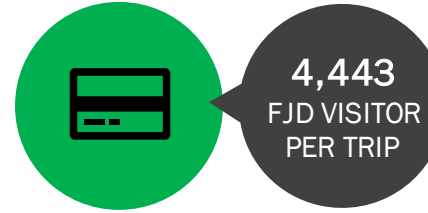
SPEND
(Among those on holiday)

385 FJD Per Night



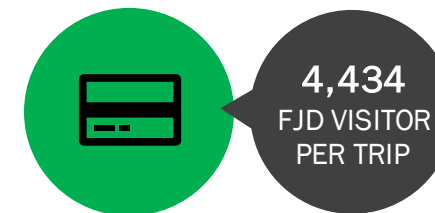
SPEND
(Among those visiting friends and relatives)

283 FJD Per Night



SPEND
(Among those on business)

508 FJD Per Night



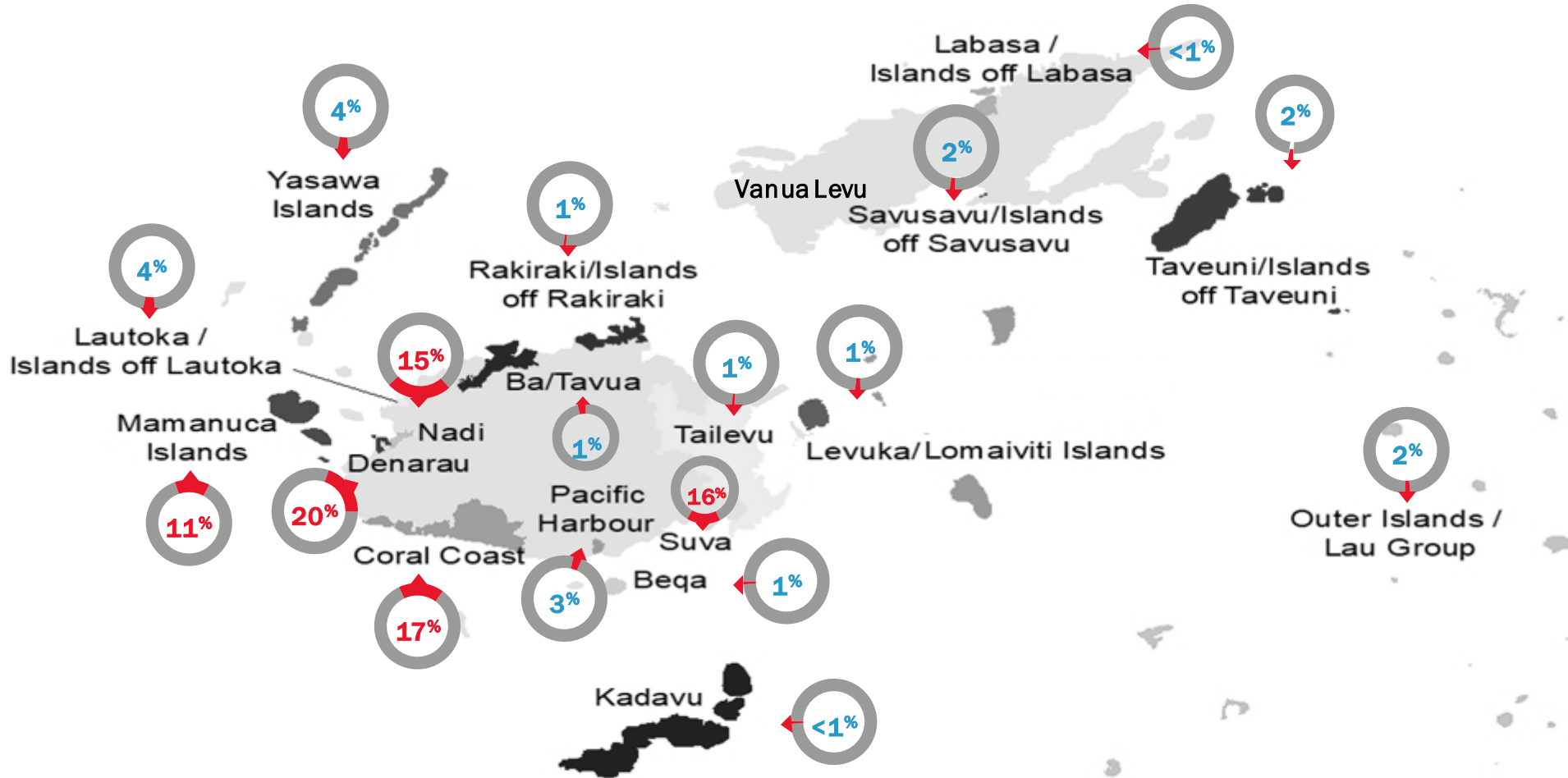
SPEND
(Among those attending conferences)

406 FJD Per Night

Most visitors indicated the purpose of their trip was for vacation/holiday, but a small percentage visited Fiji to visit friends and relatives, for business, and for conferences/conventions. Among those who came for holiday, visitors stayed approximately 8.9 nights, and spent 385 FJD per night and 3,405 FJD per trip. By comparison, in 2019 holiday/vacation visitors stayed 8 nights, and spent 360 FJD per night and 2,880 per trip. Visitors who indicated they arrived to visit friends and family stayed 15.3 nights compared to 12.4 in 2019. As a result, those visiting friends and family spent considerably more per night (283 vs 261 FJD) and per trip (4,333 vs 3,236 FJD). Business travellers spent about 5 less days on average in 2022 than in 2019. Although their per night expenditures were greater in 2022 than 2019 (508 vs 411 FJD), their overall expenditures per trip were lower due to the shorter stay. Conference attendees spent about 4 more nights in 2022 than 2019 (10.9 vs 6.2). While they spent less per night in 2022 compared to 2019 (406 vs 427 FJD), their overall expenditure per trip was greater due to the longer length of stay (4,434 vs 2,647 FJD).

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

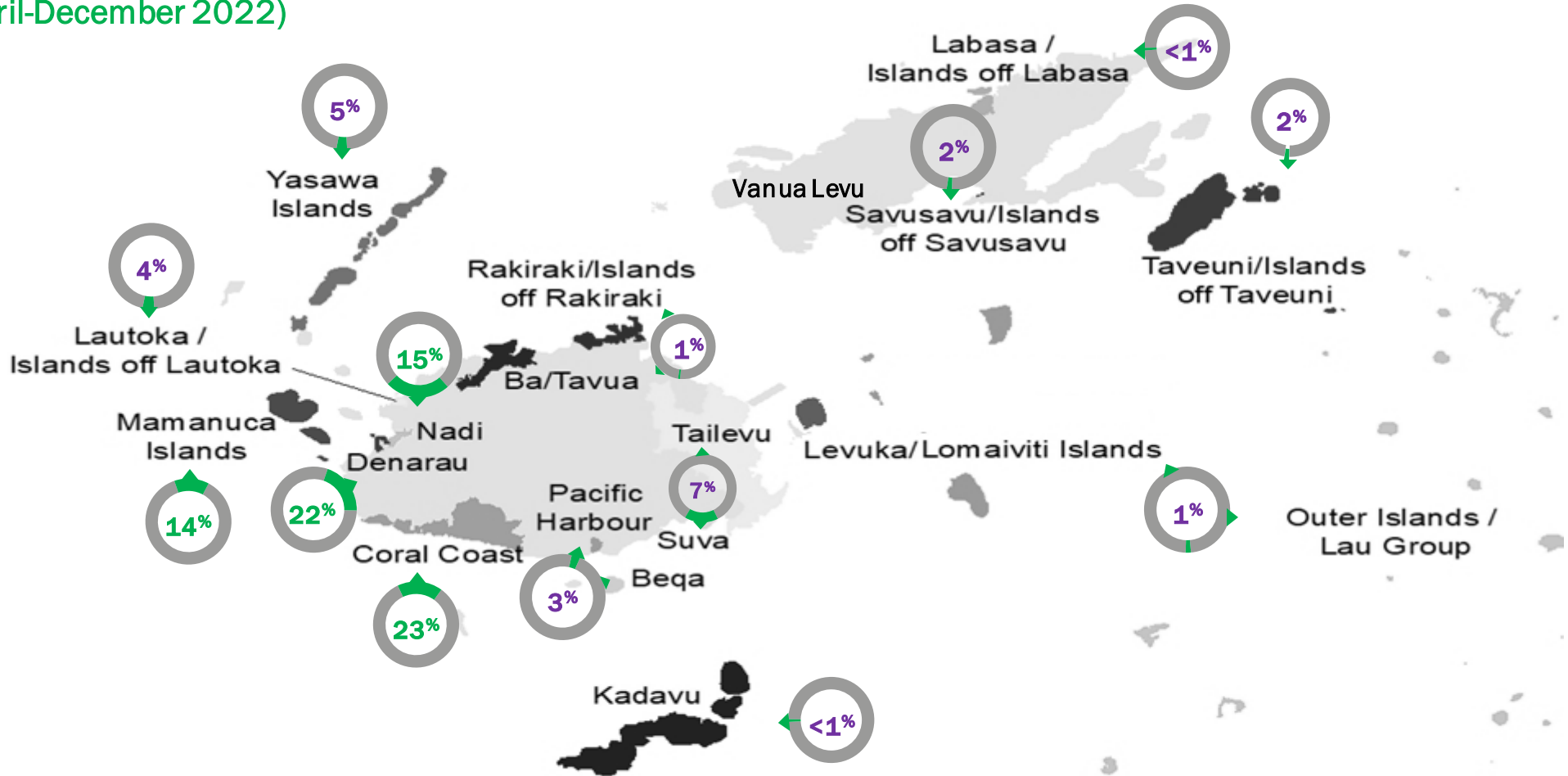
Regions Visited as a Percent of Total Visitor Days



Denarau was the busiest destination with over 1 million visitor days (20%) out of almost 3.8 million visitor days across all of Fiji in 2019. Other popular destinations included Coral Coast (17% of total visitor days), Suva (16%) and Nadi (15%).

Visitor Day: A measure of both duration and volume, e.g., a party of two visitors staying 10 days equals 20 visitor days.

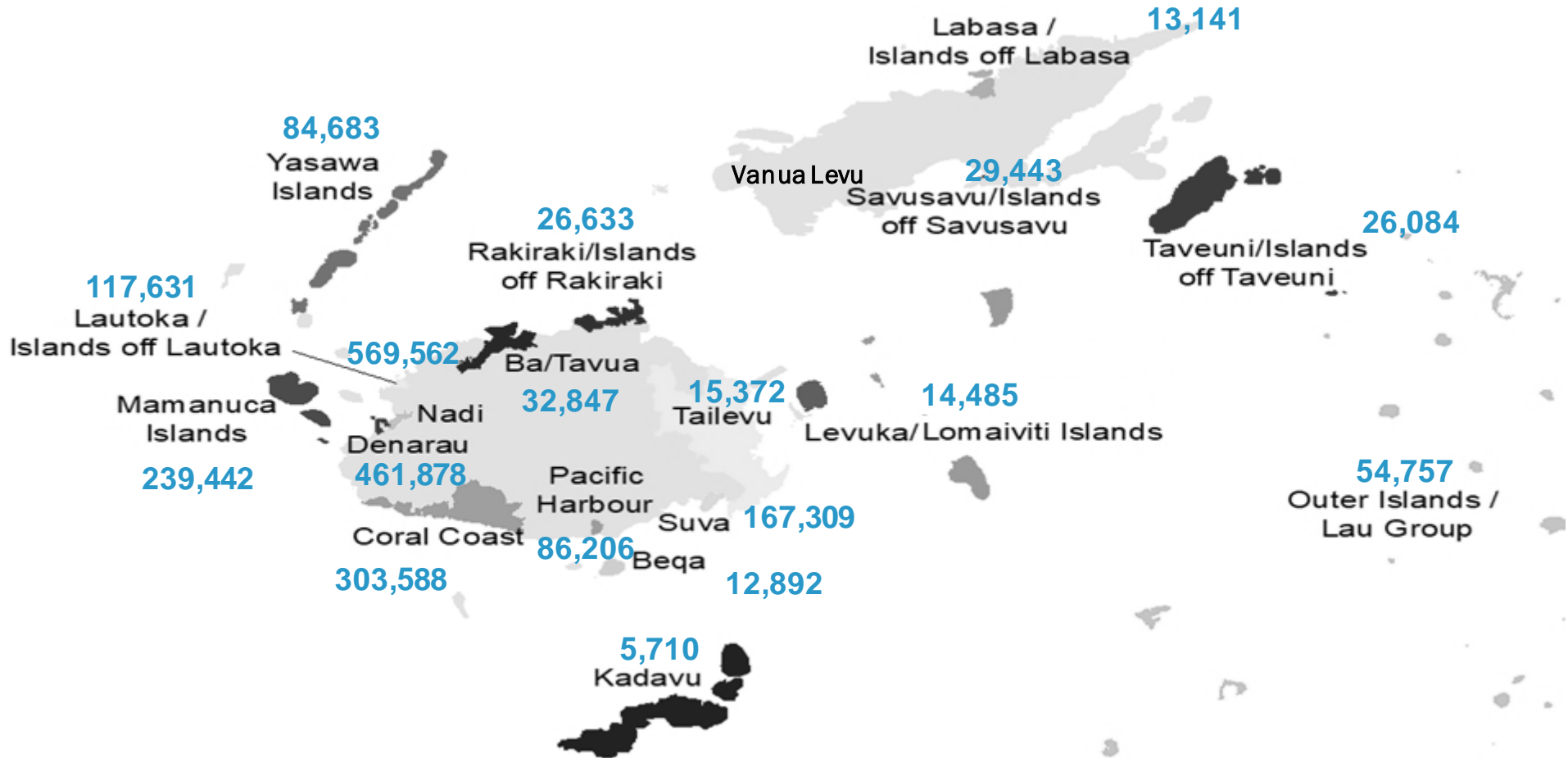
Regions Visited as a Percent of Total Visitor Days (April-December 2022)



The most visited regions in 2022 were similar to those in 2019. Approximately 23% of visitor days were spent in the Coral Coast (17% in 2019), 22% spent in Denarau (20% in 2019), 15% in Nadi (15% in 2019), and 14% on the Mamanuca Islands (11% in 2019). The biggest discrepancy was for Suva. In 2022, 7% of visitors days were spent in Suva/Tailevu, but in 2019, 17% of visitor days were spent in these two regions.

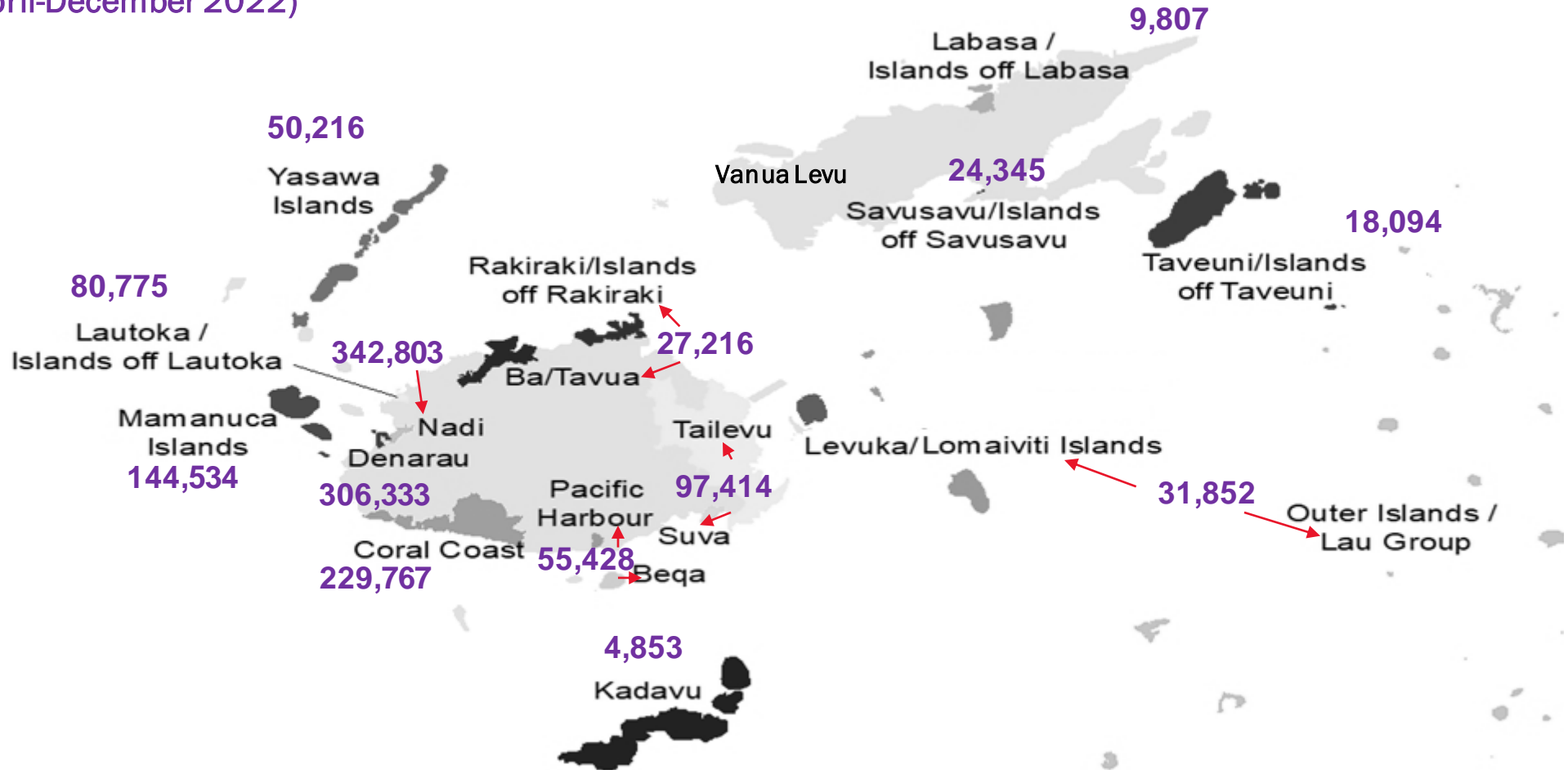
Visitor Day: A measure of both duration and volume, e.g., a party of two visitors staying 10 days equals 20 visitor days.

Number of Visitors



The most visited destination or region was Nadi, the location of the main International Airport. Almost two-thirds of visitors to Fiji will stop in Nadi at some point. Nearby Denarau also drew many visitors. The third most visited destination was the Coral Coast. Though Suva has only half the number of visitors as the Coral Coast; Suva is just as busy (based on visitor days on the previous slide) due to people staying for longer periods of time in Suva.

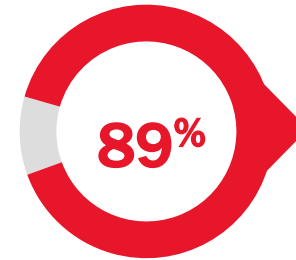
Number of Visitors
(April-December 2022)



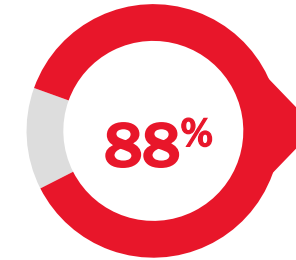
The number of visitors to each region in 2022 is not comparable to 2019. However, the data for both years indicates that the greatest number of visitors travelled to Nadi, Denarau, Coral Coast, the Mamanuca Islands, and Suva, in that order.

Number of visitors: The number of visitors who traveled to the region from April to December 2022 for a day trip or even longer.

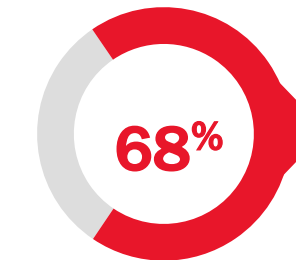
SATISFACTION WITH FIJI EXPERIENCE



OVERALL SATISFACTION



LIKELY TO RECOMMEND

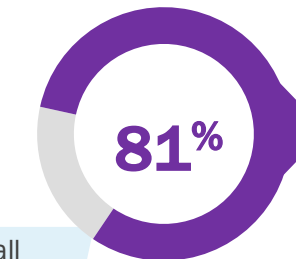
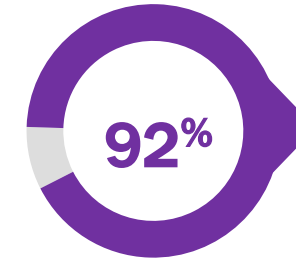
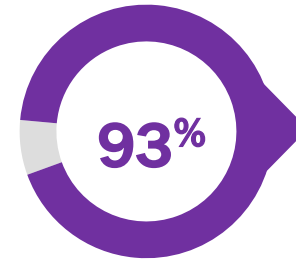
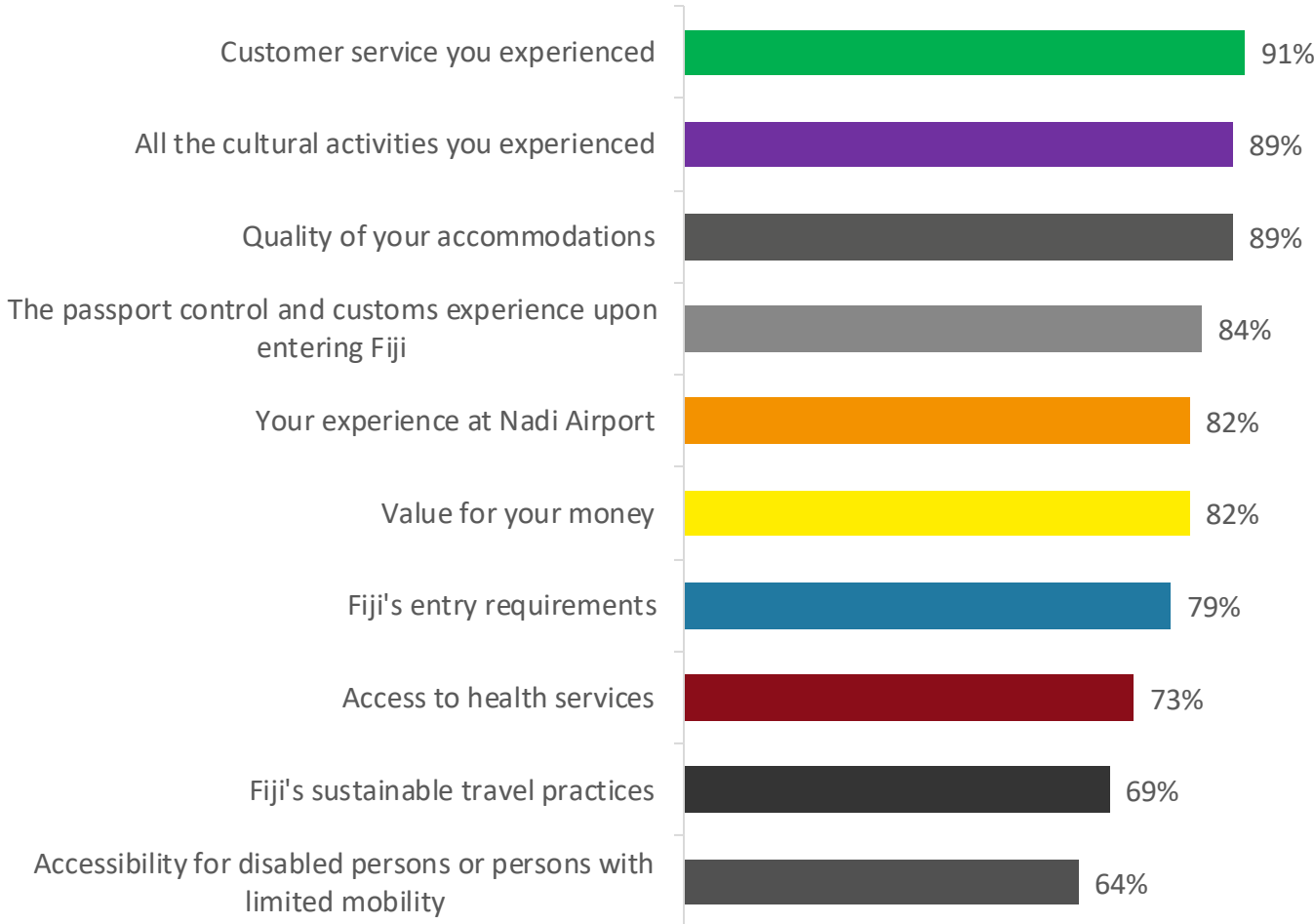


LIKELY TO VISIT FIJI IN THE NEXT 5 YEARS

9-out-of-10 visitors gave their trip experience a high rate of satisfaction. Many visitors were particularly satisfied with the customer service they experienced and the quality of accommodations. Their overall airport experience, including their experience with passport and customs, was very pleasant. And visitors felt safe and secure while in Fiji. Value for money and shopping experience were less favourable. Appreciation of the destination led to many likely to recommend a visit to Fiji to their friends and family.

Satisfaction and recommendations: the percent of visitors who rated a 7 to 10 on a scale where 1=Not at all satisfied/likely and 10=Extremely satisfied/likely

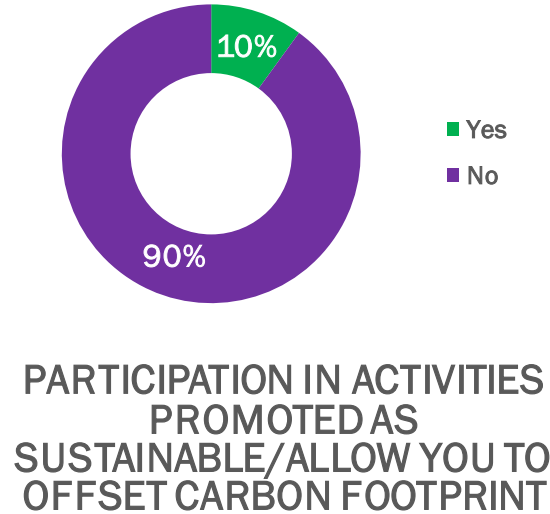
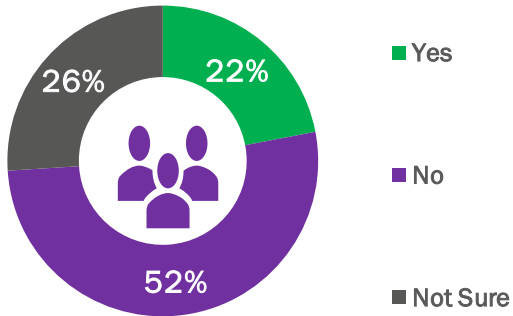
SATISFACTION WITH FIJI EXPERIENCE



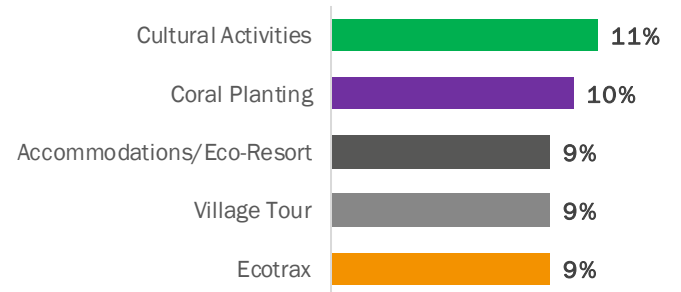
Visitor satisfaction was up in 2022 compared to 2019 on most measures. For example, 93% indicated overall satisfaction in 2022 compared to 89% in 2019. Likewise, 92% compared to 88% were likely to recommend Fiji as a destination, and 81% compared to 68% indicated they were likely to visit Fiji again in the next 5 years. Visitors in 2022 were especially satisfied with the cultural activities they experienced (89% satisfaction in 2022 compared to 72% satisfaction in 2019), and the quality of their accommodations (89% in 2022 compared to 84% in 2019). New in 2022 were satisfaction questions on Fiji's entry requirements, access to health services, Fiji's sustainable travel practices, and accessibility for disabled persons. Satisfaction for these measures ranged from 64% to 79%.

Satisfaction and recommendations: the percent of visitors who rated a 7 to 10 on a scale where 1=Not at all satisfied/likely and 10=Extremely satisfied/likely

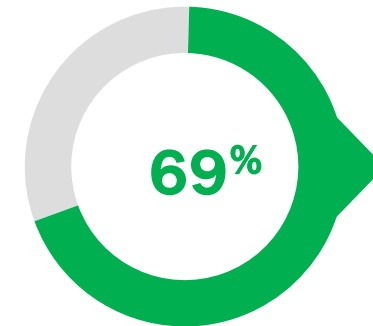
AWARENESS OF SUSTAINABILITY CAMPAIGNS



TOP SUSTAINABLE ACTIVITIES*



TRIP EXPECTATION COMPARISONS(%)



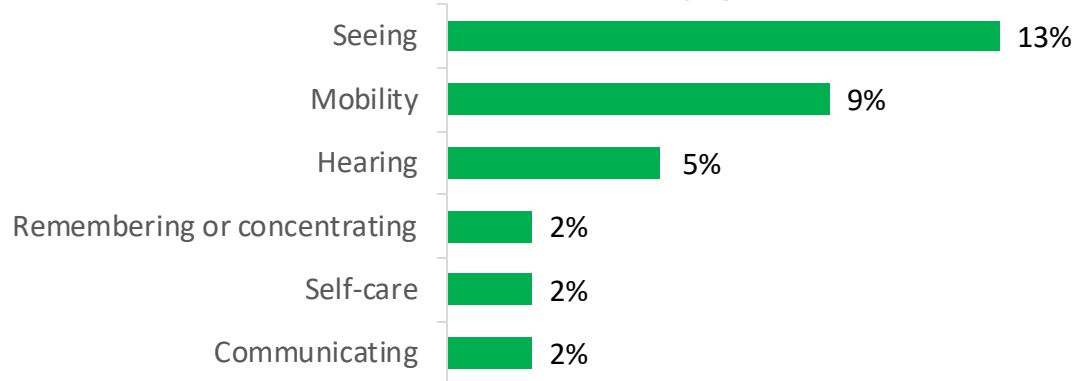
■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

*Respondents were asked "Did you participate in any activities that were promoted as sustainable or allowed you to offset your carbon footprint?" Those who answered 'Yes' were asked, "Which activities?"

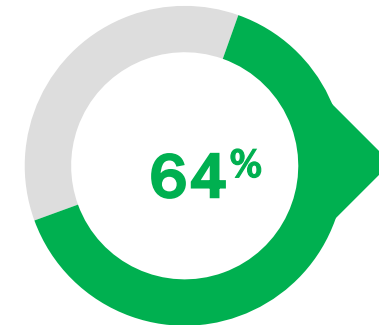
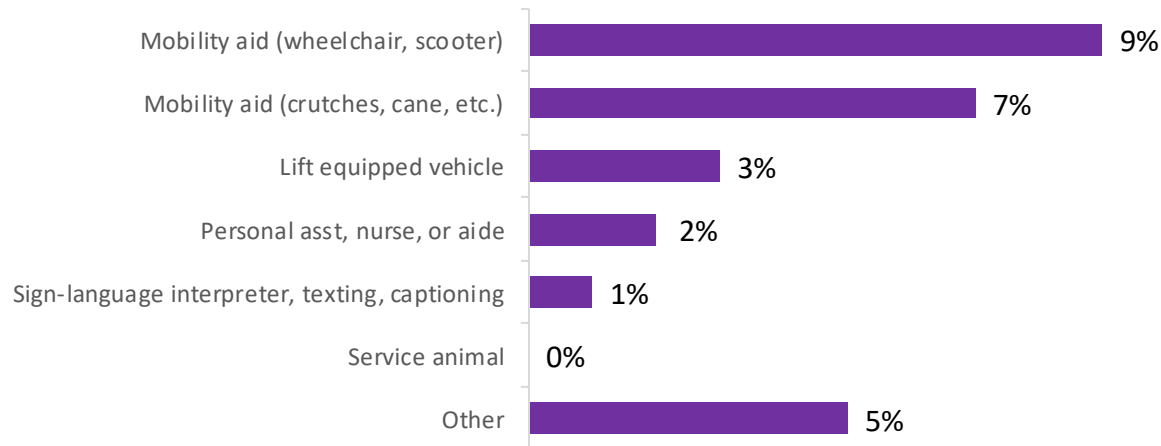
**Among those who believed the question was applicable to them and who provided a response from 7-10 on the satisfaction scale.

The 2022 IVS included a new set of questions specifically pertaining to sustainability. Overall, approximately 22% of visitors indicated they were aware of any sustainability campaigns on their trip. Ten percent of visitors indicated they participated in an activity promoted as sustainable. The most cited activities included cultural activities, coral planting, staying at a sustainable-touted resort, taking a village tour, and using Ecotrax. Nearly 70% of visitors indicated they were satisfied with Fiji's sustainable practices. Visitors also expressed general contentment with their trip: 6% found the trip less enjoyable than what they expected, 32% found it about what they expected, and 61% found the trip more enjoyable than what was expected.

TRAVEL PARTY DIFFICULTIES (%)



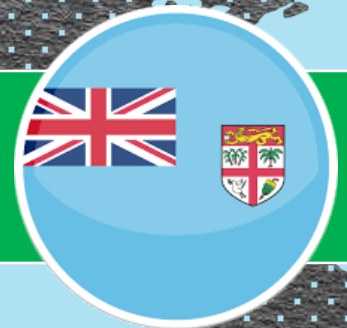
ASSISTANCE USED BY TRAVEL PARTY



SATISFACTION
WITH
ACCESSIBILITY FOR
DISABLED
PERSONS

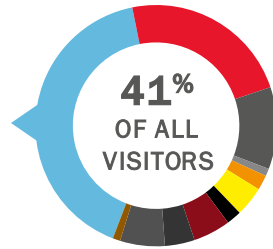
The 2022 IVS also included new questions surrounding disability and inclusion. When asked if their travel party included any persons who had difficulties, 13% mentioned sight, 9% mentioned mobility, 5% mentioned hearing, 2% noted memory or concentrating, 2% noted self-care, and 2% indicated communication. When asked if the travel party utilized assistance for any of these difficulties, 9% indicated an electric mobility aid (like wheelchair or scooter), 7% noted a non-electric mobility aid (like a crutch or cane), 3% noted a lift-equipped vehicle, 2% mentioned a personal assistant, and 1% noted a sign-language interpreter. Among those who felt the question pertained to them, 64% indicated they were satisfied with Fiji’s accessibility for disabled persons or persons with limited mobility.

SOURCE MARKET PROFILES



2019

AUSTRALIA



367,020

TOTAL VISITORS

FJD 919M

TOTAL SPEND

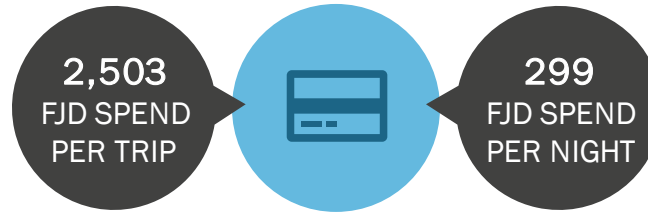
FJD 573M

PRE-PAID SPEND

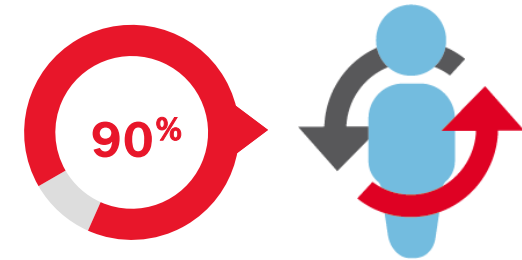
AVERAGE LENGTH OF STAY



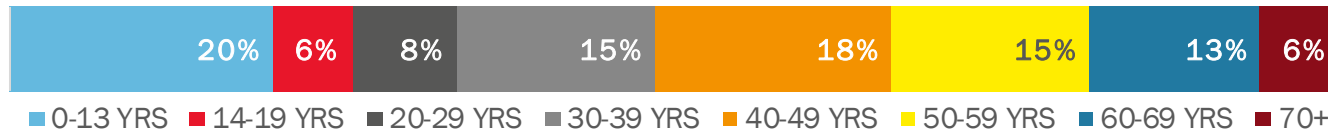
SPEND



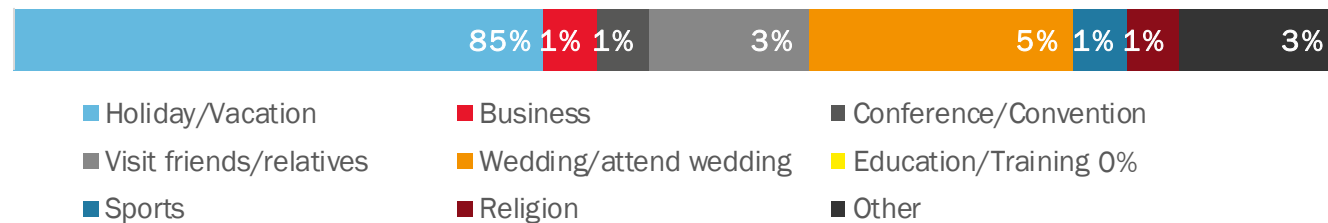
SATISFACTION



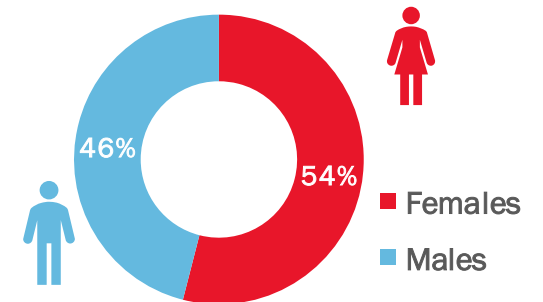
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



The growth in visitor arrivals from Australia was relatively stable at +0.4%. Australia continued to account for the largest share of visitors (41%). Australians spent less than the overall average visitor due to a lower pre-paid package cost and slightly less post-arrival spending. Most visitors were here for a holiday with a small segment that came specifically for a wedding or to get married.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

2022 APR-DEC VISITORS

AUSTRALIA



345,149
JAN-DEC VISITORS

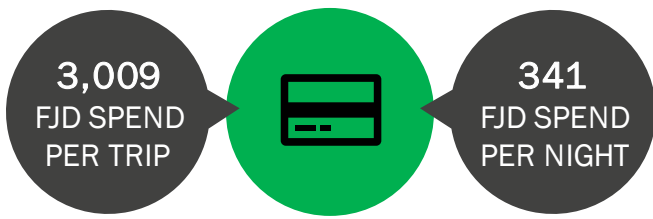
FJD 933M
TOTAL SPEND*

FJD 447M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



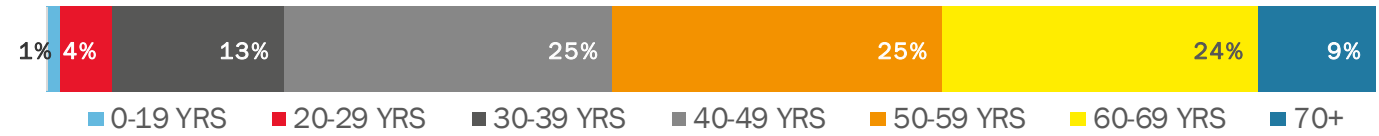
SPEND



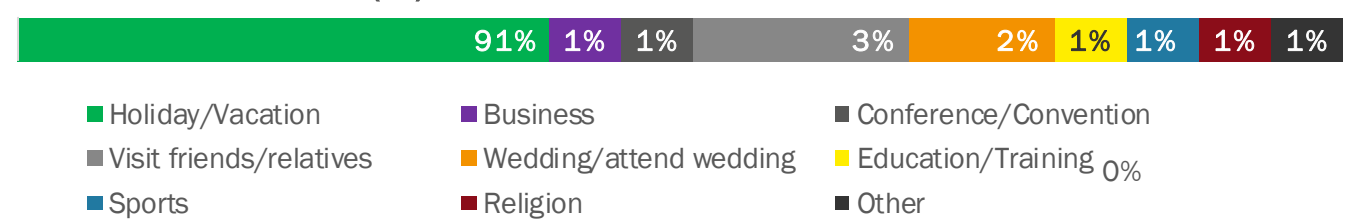
SATISFACTION



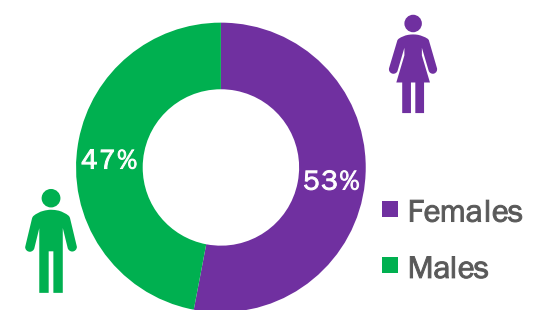
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



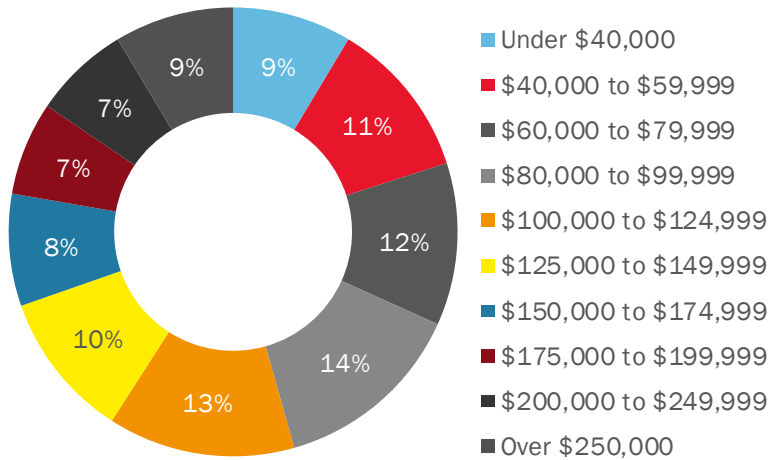
GENDER**



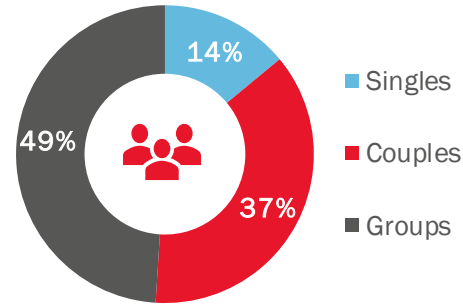
Visitors from Australia constituted the majority of travellers to Fiji in 2022. There were 345,149 Australian visitors in all of 2022, and 309,943 from April to December 2022. Australians stayed an average of 8.8 nights, up from 8.4 nights in 2019. Spending was also up: Australians spent 341 FJD per night in 2022 (compared to 299 FJD in 2019) and 3,009 per trip (compared to 2,503 FJD in 2019). In fact, Australians spent more from April to December 2022 than they did in all of 2019. Over 90 percent of Australians arrived on holiday/vacation (up from 85% in 2019), and satisfaction was greater in 2022 compared to 2019 (94% vs 90%).

*By visitors who arrived from April to December 2022
**Characteristics of survey respondents only

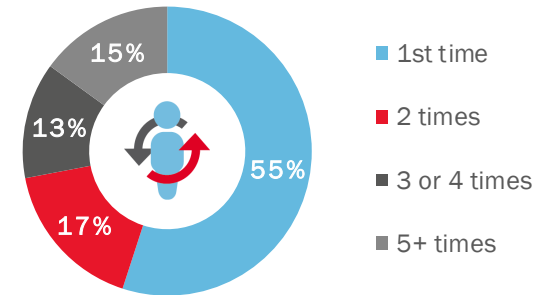
ANNUAL HOUSEHOLD INCOME (AUD)



PARTY SIZE



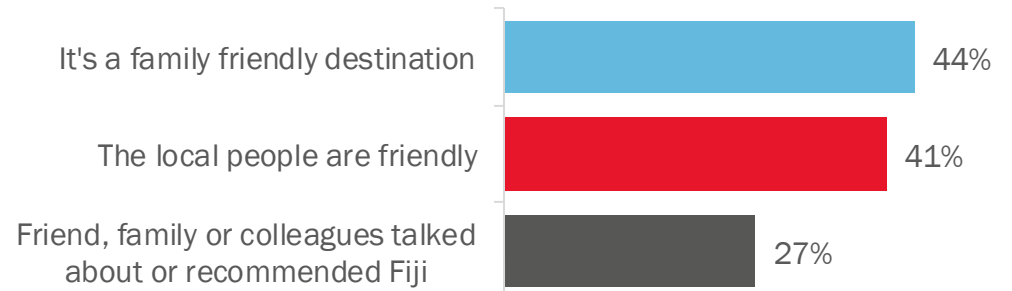
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



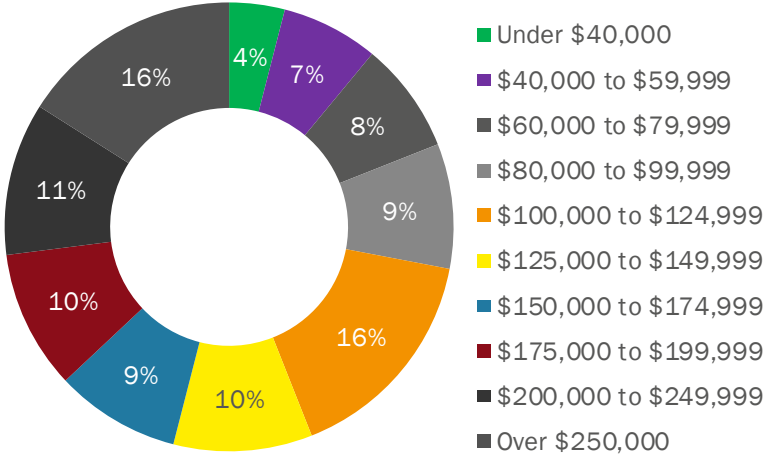
TOP INFLUENCING FACTORS FOR VISITING*



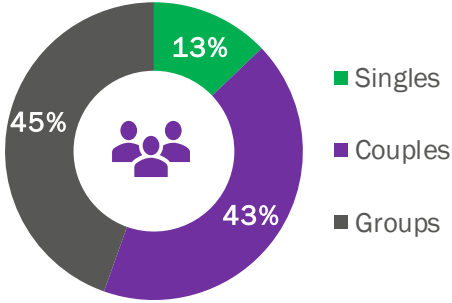
The Australian visitor spanned the full range of economic status and usually travelled in groups or pairs, but rarely travelled alone. This market has a high number of repeat visitors (45%), as such, Australians rely on recommendations from friends and previous visits for information. Australians stated that Fiji was appealing because of its reputation as a family friendly destination, its friendly local people, and its popularity among friends and family.

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

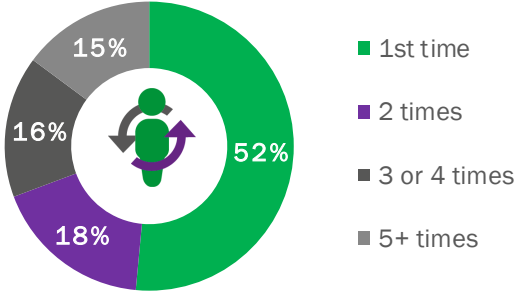
ANNUAL HOUSEHOLD INCOME (AUD)



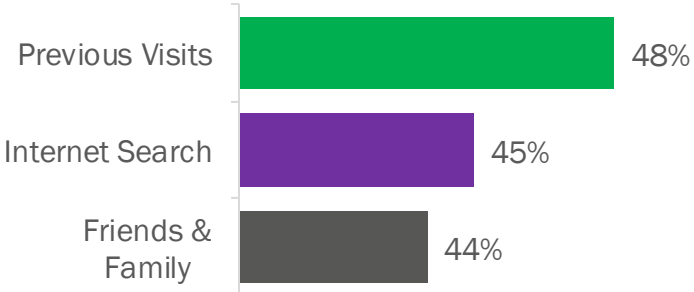
PARTY SIZE



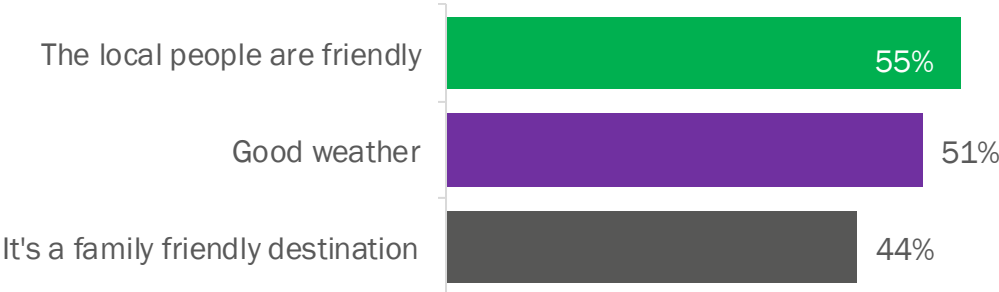
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

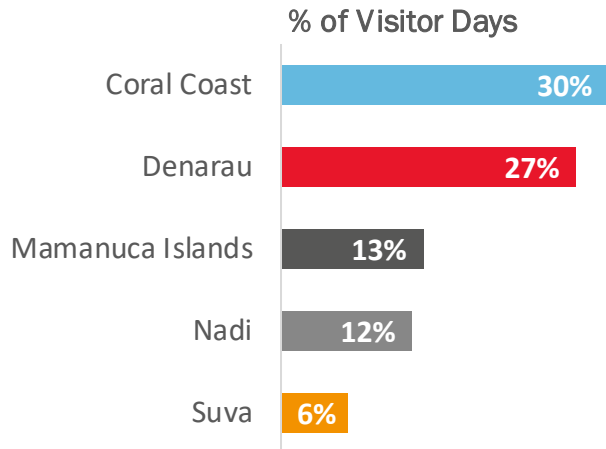


Australian visitors denoted a variety of economic backgrounds, but travellers in 2022 included a larger proportion of wealthy families. For example, households making \$150K AUD or more comprised 31% of visitors in 2019, but 46% in 2022. Interestingly, in 2022 a slightly smaller percentage of visitors arrived as part of a group (45% vs 49%), while a slightly larger percentage arrived as couples (43% vs 37%). Visitors relied less on family and friends and more on previous experiences and the Internet to plan their trip in 2022. Additionally, the percentage of visitors who cited the friendliness of the local people and the good weather as influencing factors for visiting was up in 2022 compared to 2019.

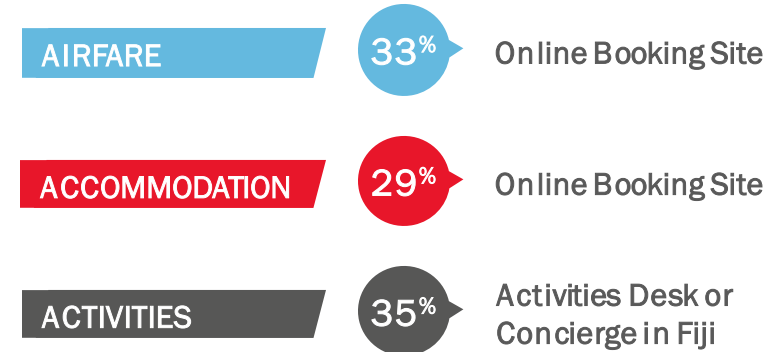
*Multiple responses, therefore, totals do not add up to 100%.



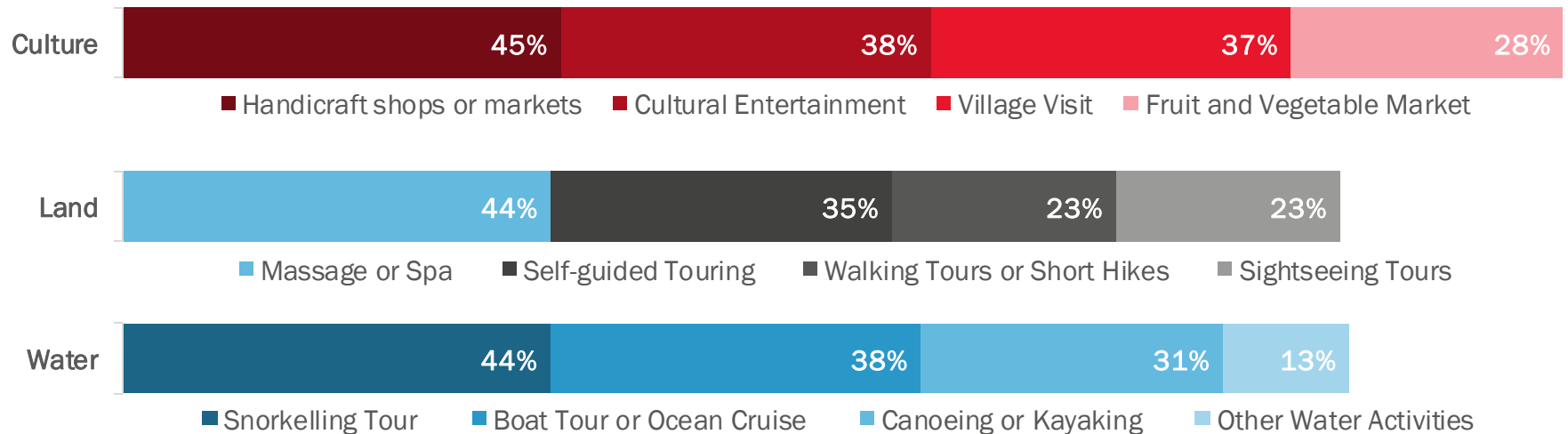
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

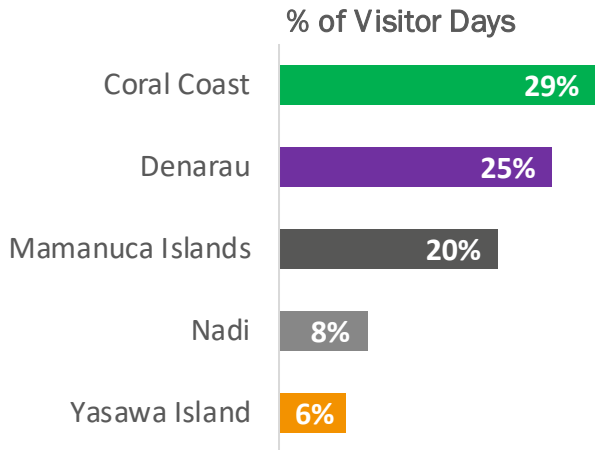


Australians visited an average of 2.3 tourism regions and were more likely to stay on the Coral Coast or Denarau. Australians were very active travellers, especially participating in many cultural activities. They tended to do self-guided over sightseeing tours. Accommodations were typically booked through an online booking site and activities purchased post arrival.

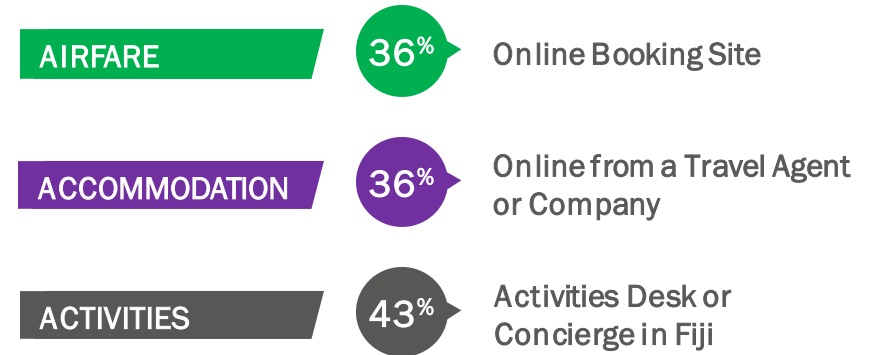
*Multiple responses, therefore, totals do not add up to 100%.



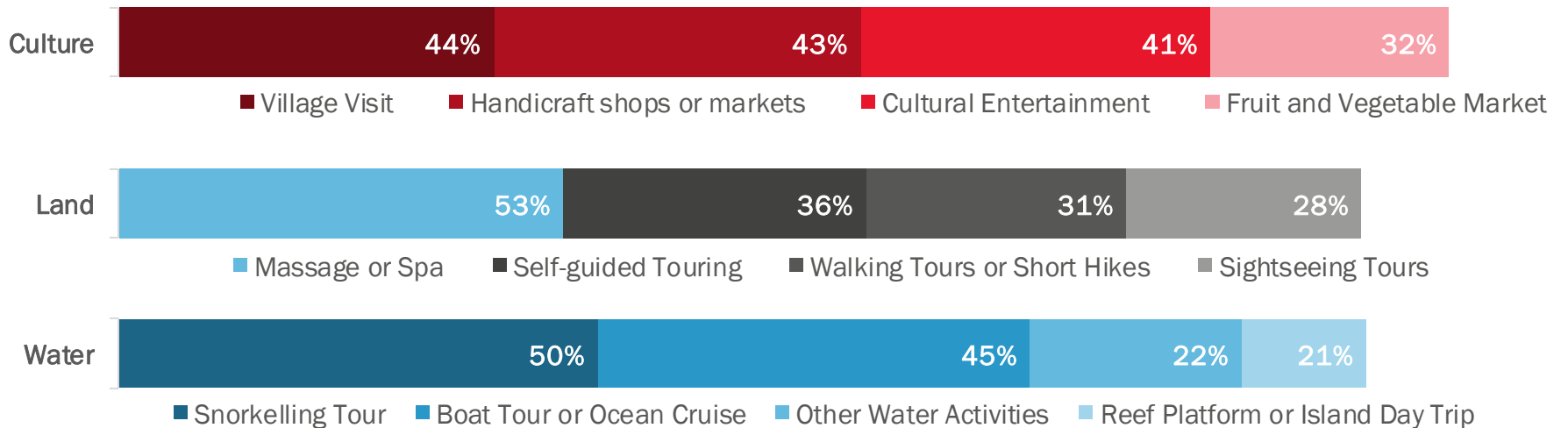
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

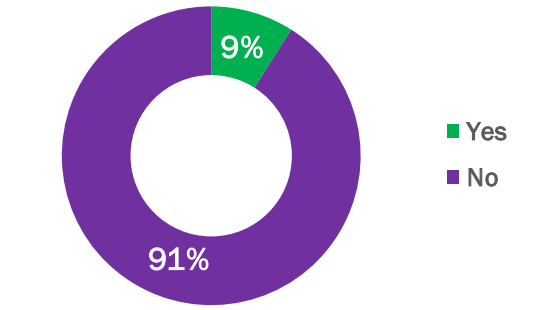
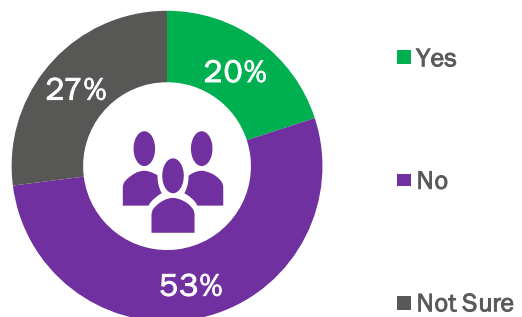


As was the case in 2019, Australians preferred to visit the Coral Coast, Denarau, and the Mamanuca Islands. While they preferred using online booking sites for airfare to Fiji, the largest proportion of Australians noted their accommodations were selected online from a travel agent or company. Australians, like most visitors, demonstrated greater activity in 2022 compared to 2019 in terms of the percentage of respondents who indicated involvement in various activities. For example, visitors who visited a spa or massage was up (53% vs 44%) as well as those who took snorkelling tours (50% vs 44%). The increase in activity also contributed to greater spending on tours and activities in 2022.

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

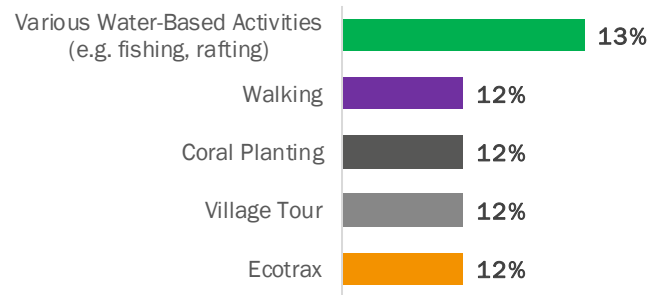
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

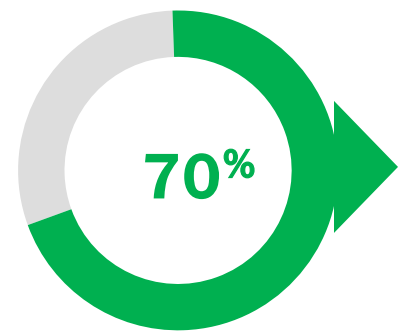


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

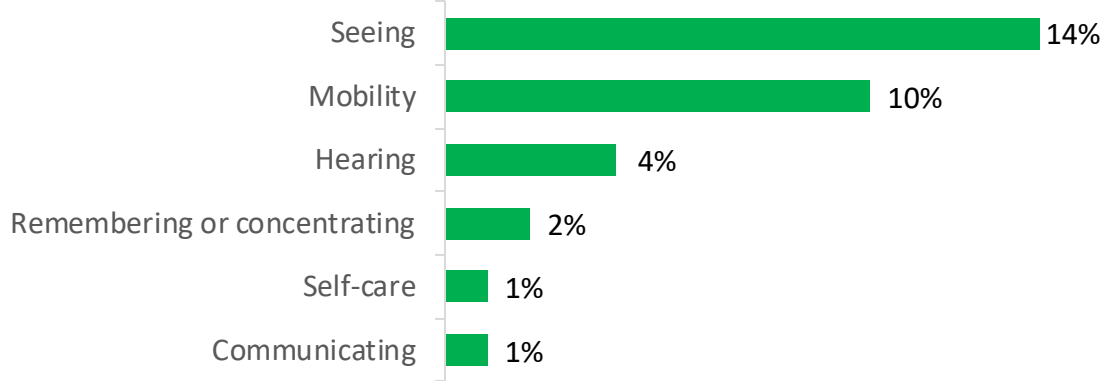


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

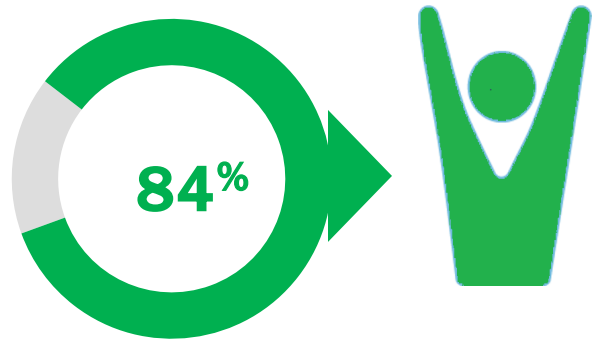
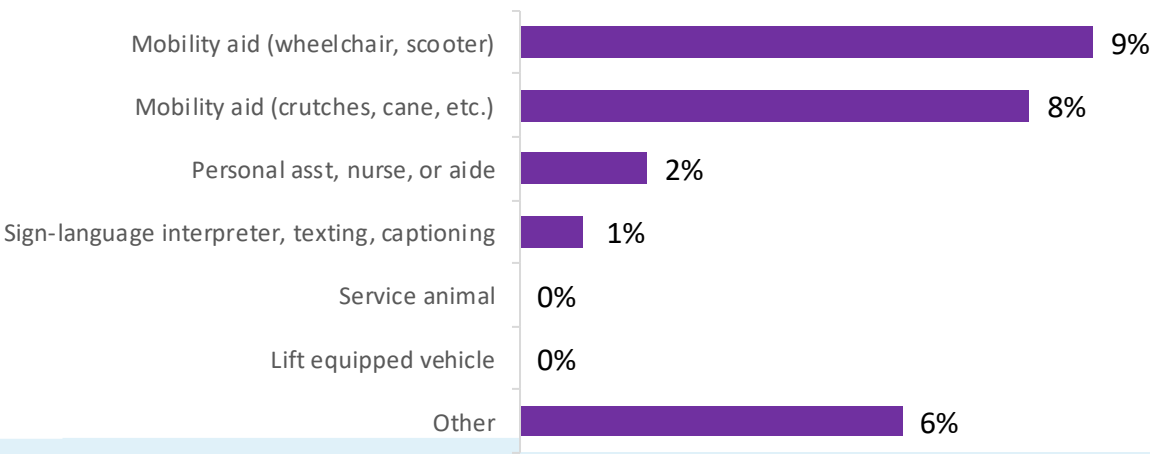
Like most visitors, Australians demonstrated little awareness of Fiji’s sustainability campaigns and indicated little participation in activities that were promoted as sustainable. Among those who did participate in a sustainable activity, visitors mentioned water-based activities (like fishing or river rafting), walking, planting coral, taking a village tour, and using Ecotrax. Despite little awareness of sustainability campaigns and little participation, 70 percent of Australian visitors expressed satisfaction with Fiji’s sustainable practices. Australian visitors also showed contentment with their visit. Just 5% indicated the trip was less enjoyable than they expected, 33% indicated it was about what they expected, and 62% stated their trip was more enjoyable than they expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

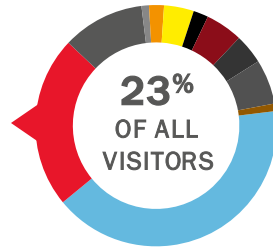


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

Australian parties to Fiji noted several physical difficulties among party members, but the most frequently cited were seeing and mobility. Electric mobility aids, such as wheelchairs and scooters, were used by less than 10% of parties. Likewise, non-electric mobility aides like crutches and canes were used by less than 10% of parties. Among those who felt they could answer the question, 84% indicated they were satisfied with Fiji’s accessibility for disabled persons.

2019

NEW ZEALAND



205,998

TOTAL VISITORS

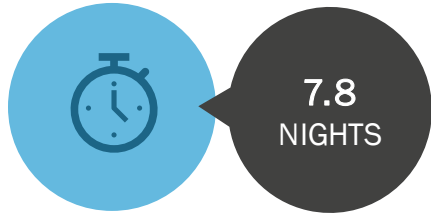
FJD 461M

TOTAL SPEND

FJD 284M

PRE-PAID SPEND

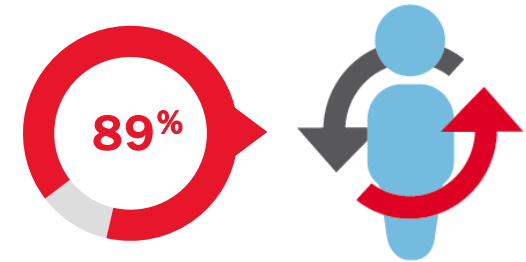
AVERAGE LENGTH OF STAY



SPEND



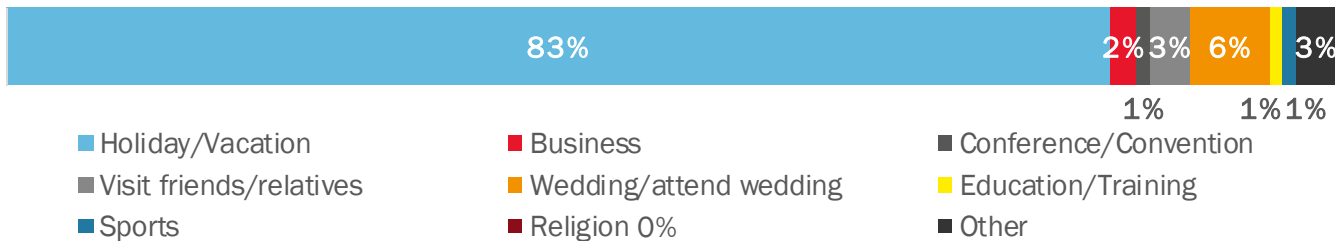
SATISFACTION



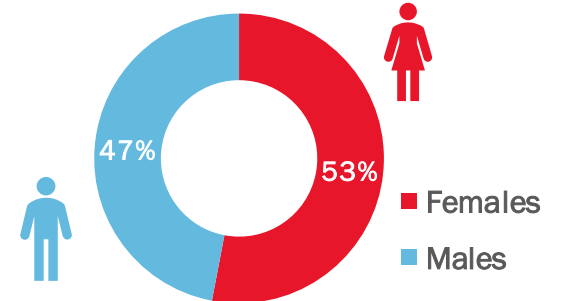
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



New Zealand visitation was up +3.7% in 2019. Daily spending by New Zealanders was slightly less than Australian visitors and so was the per trip spending due to the shorter length of stay.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

2022 APR-DEC VISITORS

NEW ZEALAND



152,863
JAN-DEC VISITORS

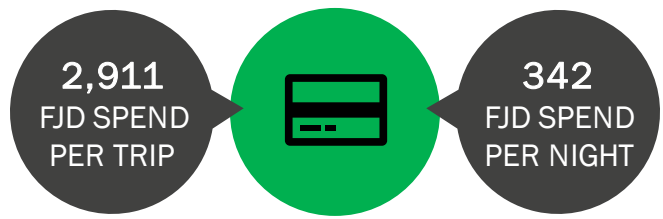
FJD 438M
TOTAL SPEND*

FJD 171M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



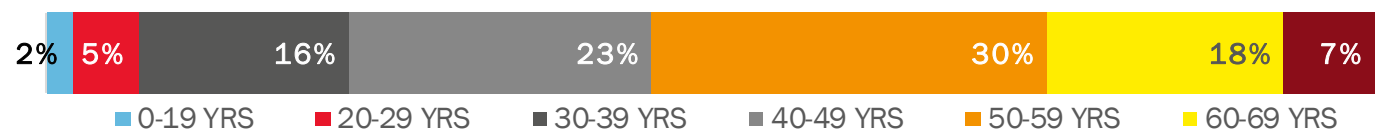
SPEND



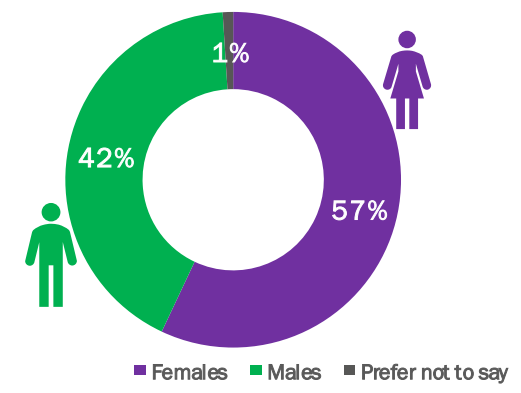
SATISFACTION



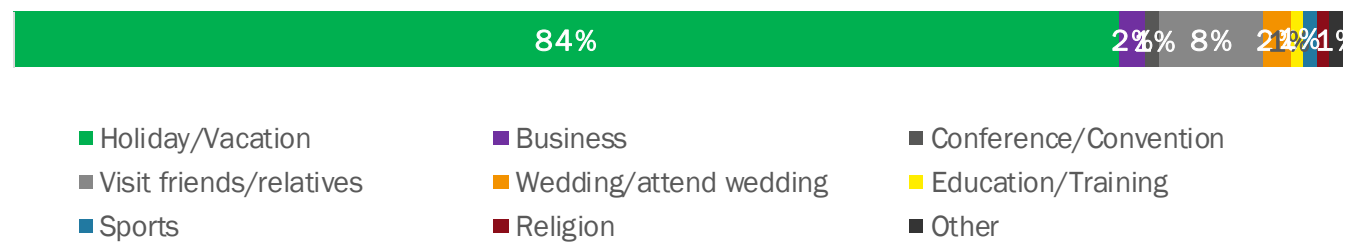
AGE OF PARTY HEAD**



GENDER**



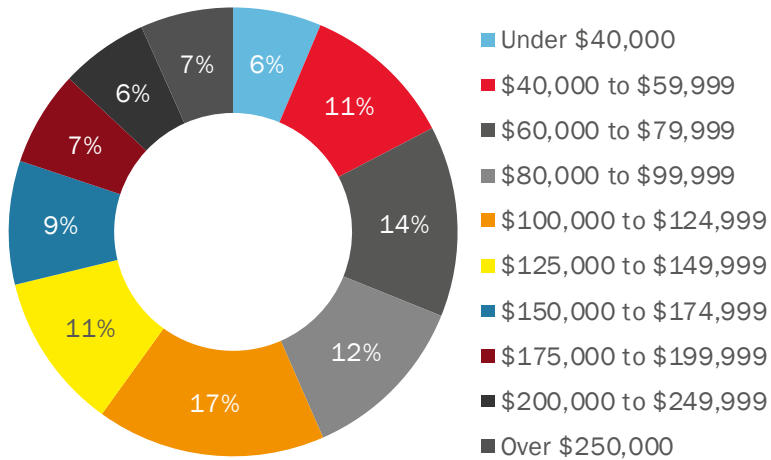
PURPOSE OF VISIT (%)



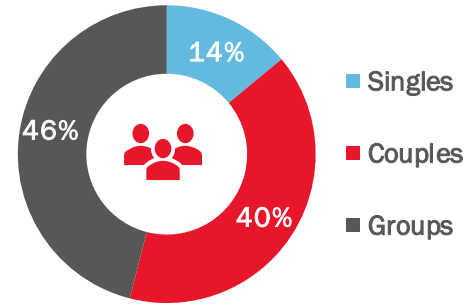
There were 152,863 visitors from New Zealand in 2022, and 150,522 arrived between April and December. The average length of stay in 2022 was 8.5 nights, which was up from 7.8 nights in 2019. Spending among New Zealand residents was also up in 2022 compared to 2019. Visitors spent 342 FJD per night in 2022 (vs 288 in 2019), and 2,911 FJD per trip (vs 2,237 in 2019). Satisfaction improved from 89% in 2019 to 94% in 2022.

*By visitors who arrived from April to December 2022
**Characteristics of survey respondents only

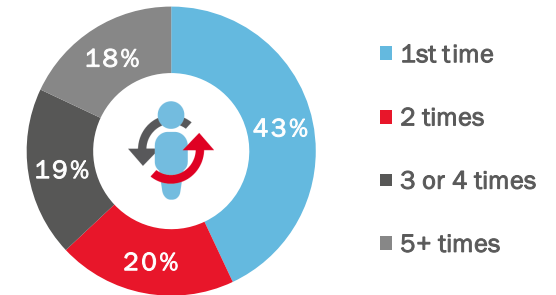
ANNUAL HOUSEHOLD INCOME (NZD)



PARTY SIZE



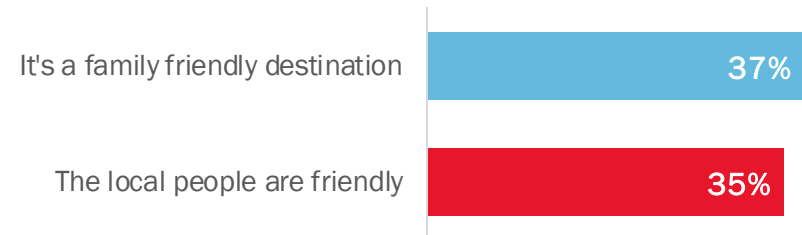
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



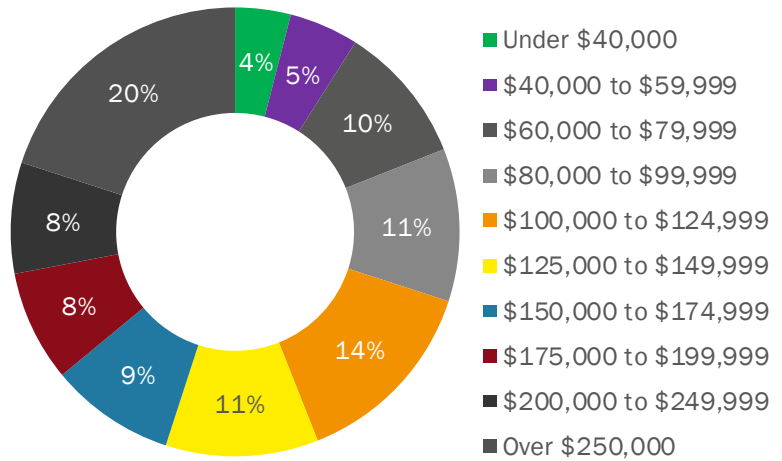
TOP INFLUENCING FACTORS FOR VISITING*



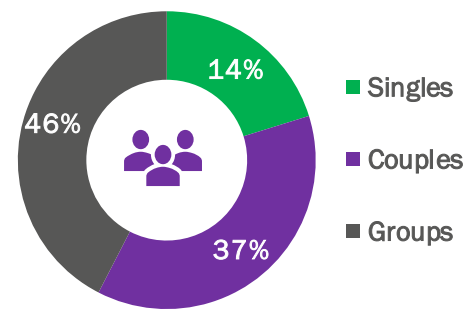
The New Zealand market had an average household income of NZD 100K – 125K and many visitors had already been to Fiji at least once before (57%). As a repeat market, friends and family and past experiences played a large role in planning. However, internet searching also influenced this market. A family friendly destination and the friendly local people were strong drivers in choosing Fiji.

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

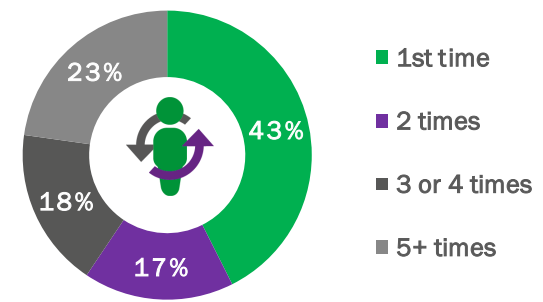
ANNUAL HOUSEHOLD INCOME (NZD)



PARTY SIZE



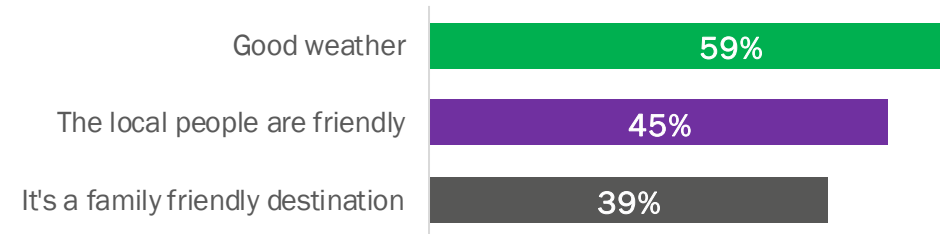
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

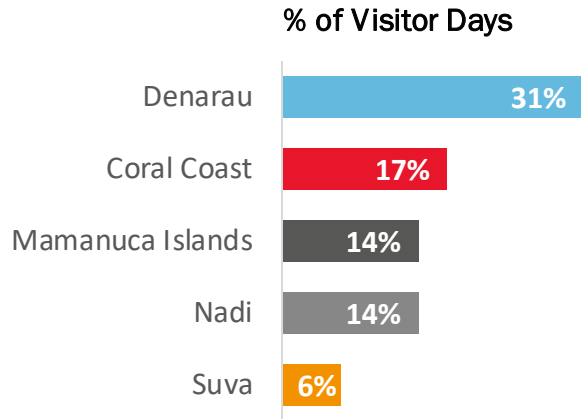


Visitors from New Zealand included a variety of economic backgrounds, but like Australians, included a larger proportion of wealthy families. For example, 45% of families made \$150K NZD or more in 2022, compared to 29% in 2019. As was the case in 2019, most visitors came as either couples or in groups, and more than half had visited Fiji before. New Zealand residents indicated they relied more on friends and family and their own experiences to plan their trip to Fiji. New Zealand residents also mentioned the weather and friendliness of locals as major influences for visiting.

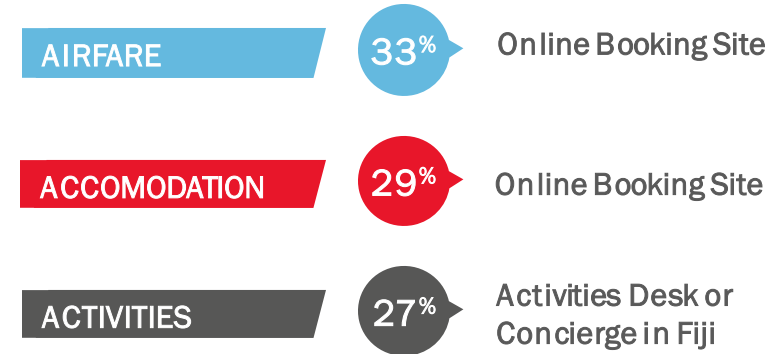
*Multiple responses, therefore, totals do not add up to 100%.



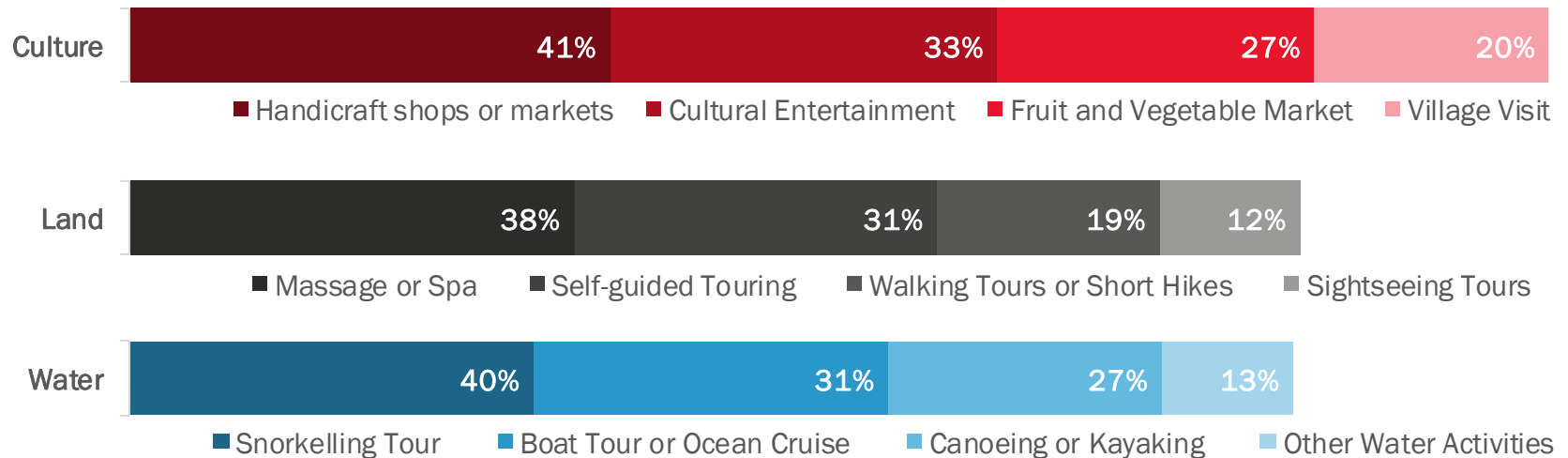
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

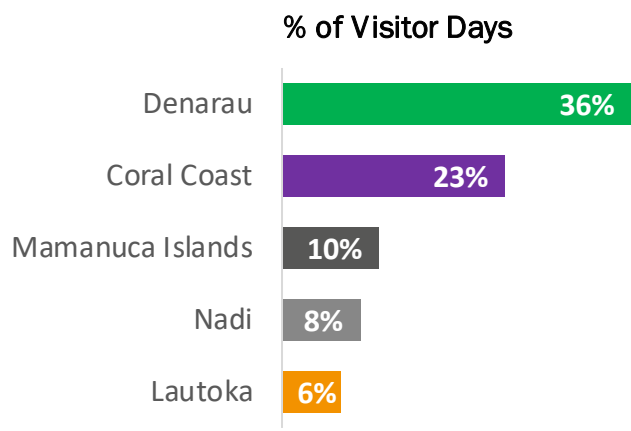


New Zealanders were more likely to enjoy Denarau as a destination of choice. Online was the preferred booking method for both their airfare and accommodations while the activities desk continued to play a role in activities selection. With many repeat experiences, they were less likely to be interested in village visits and sightseeing tours

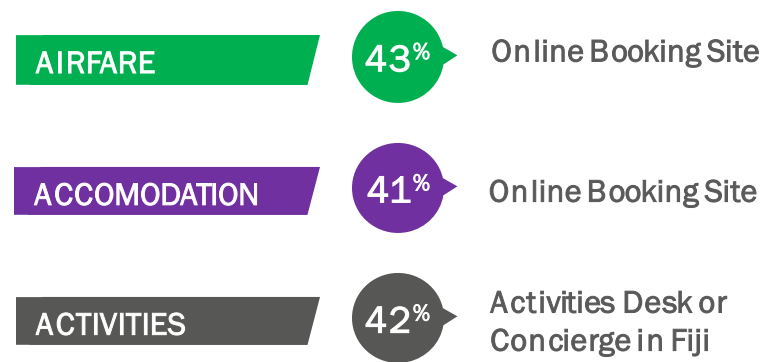
*Multiple responses, therefore, totals do not add up to 100%.



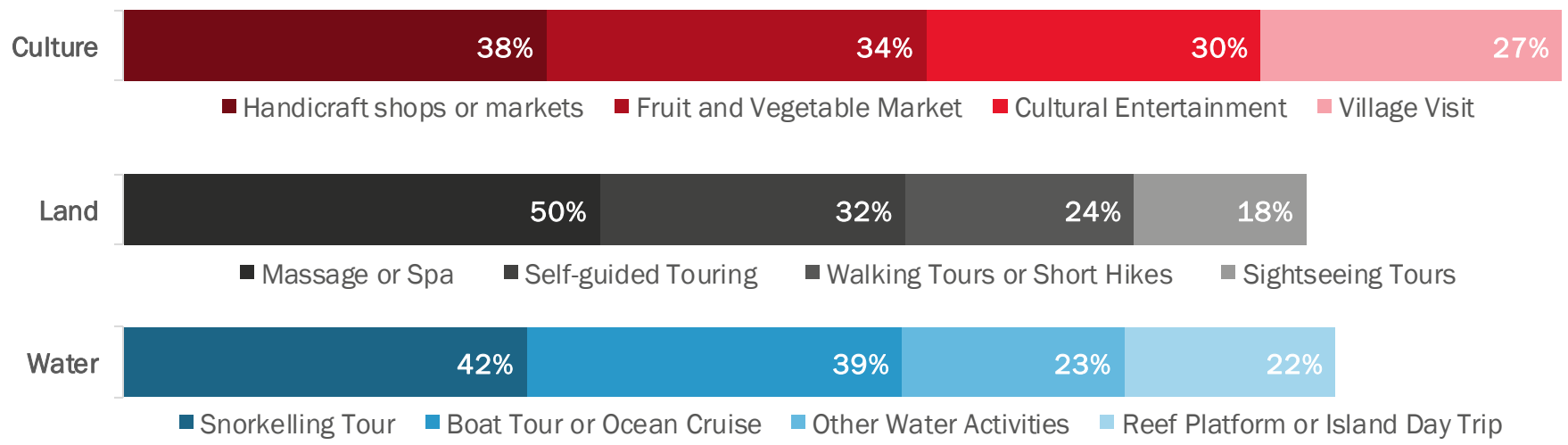
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

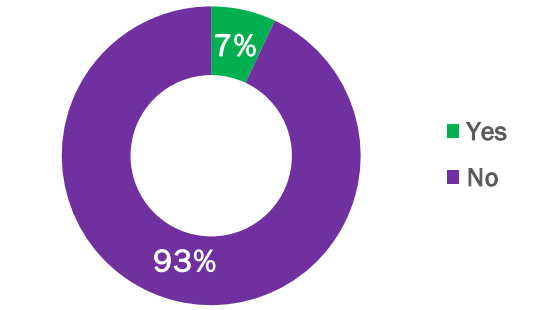
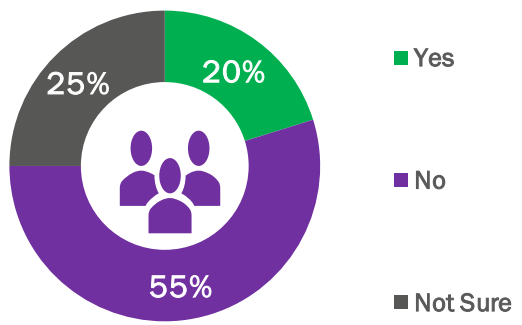


New Zealand visitors' trip behavior did not change much between 2019 and 2022. Denarau was the primary destination of choice, followed by the Coral Coast and the Mamanuca Islands. Visitors still preferred to using online booking sites for airfare and accommodations, although a larger share of visitors used these methods. Likewise, New Zealand visitors utilized an activities desk or concierge to book their activities. Visitors from New Zealand were active and show a proclivity for shopping and relaxation-related activities.

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

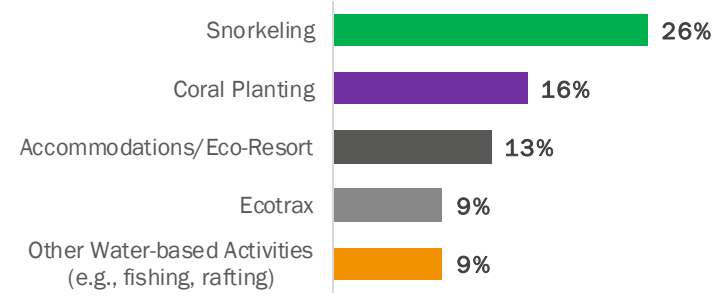
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

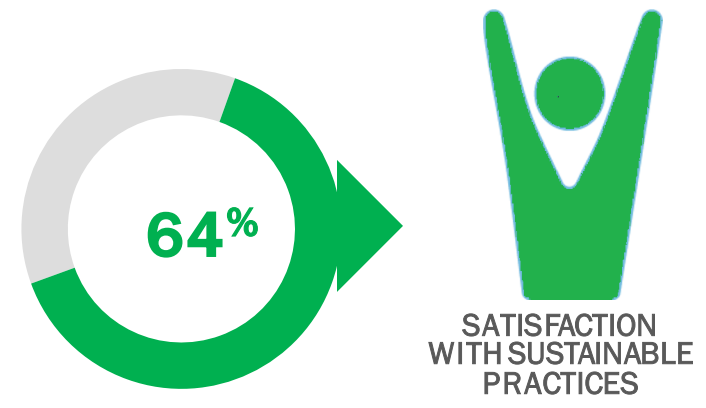


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

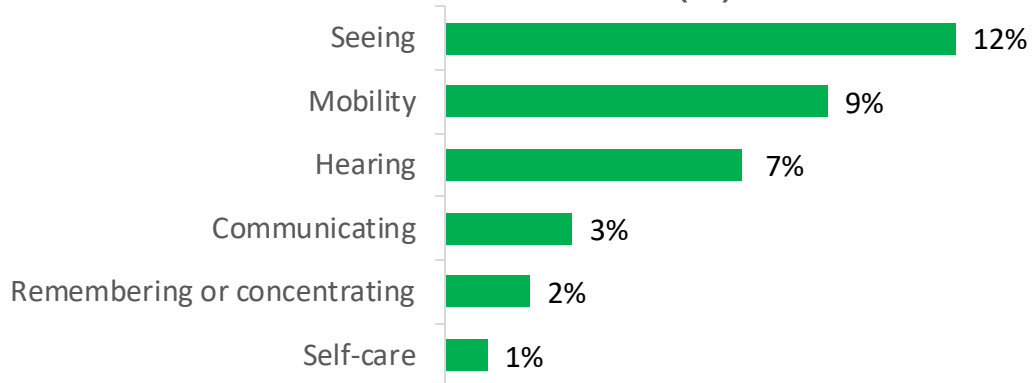


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

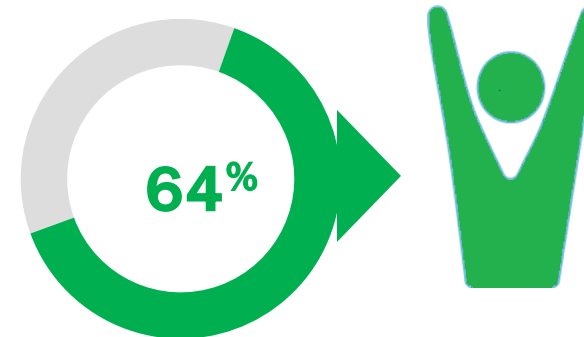
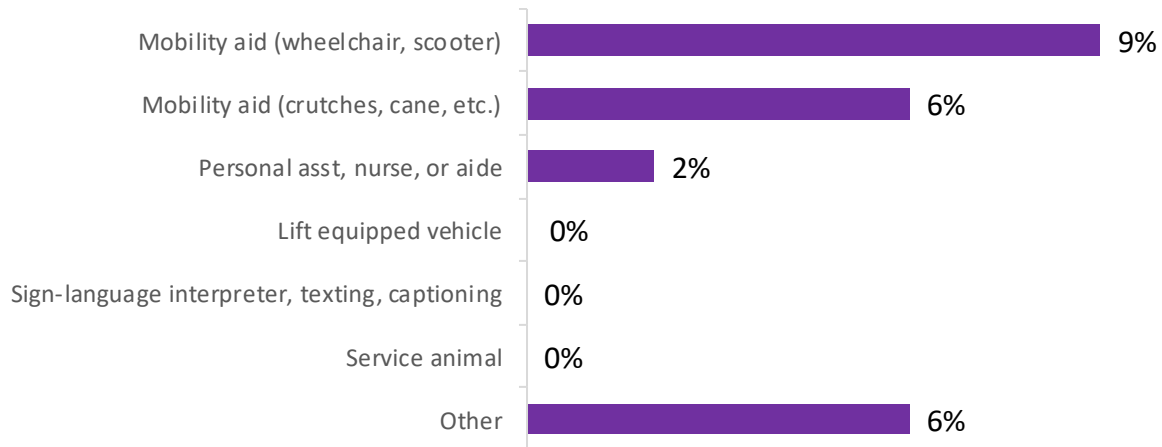
Approximately 20% of New Zealand visitors indicated they were aware of any sustainability campaigns, and just 7% revealed they had participated in activities promoted as sustainable. Sustainable activities included snorkelling, planting coral, staying at a sustainable resort, using the Ecotrax, and other water-based activities, like fishing and river rafting. Satisfaction with Fiji's sustainable practices was limited to 64% of these visitors. New Zealand residents were also happy with their trips. Just 6% indicated the trip was less enjoyable than their expectation, 37% indicated the trip met their expectation, and 56% revealed the trip was more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

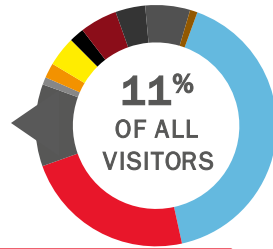


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

Visitors from New Zealand noted several physical difficulties among party members. The most prevalent were difficulties with sight, mobility and hearing. These parties relied on the use of electric and non-electric mobility aids, like wheelchairs and canes, and to a much lesser degree, personal assistants. Among those who could answer, 64% indicated satisfaction with Fiji's accessibility for disabled persons.

2019

UNITED STATES



96,968

TOTAL VISITORS

FJD 453M

TOTAL SPEND

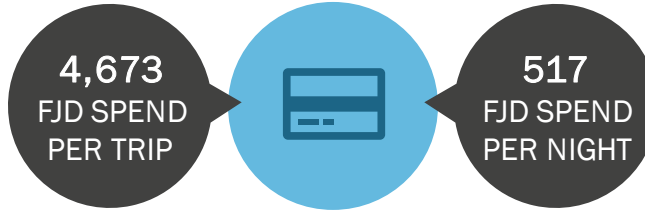
FJD 312M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



SPEND



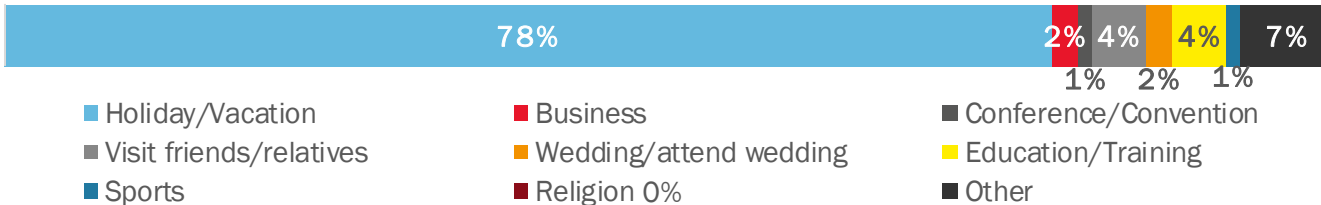
SATISFACTION



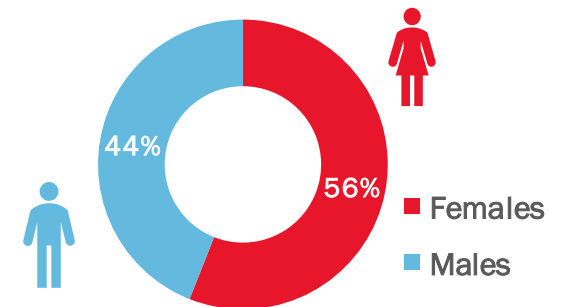
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

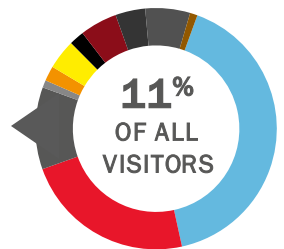


2019 saw a surge in U.S. visitors (+12.7%). Though the average age is like other markets, there were fewer children travelling from the U.S.A. Visitors were highly satisfied. Their average daily spend and their average expenditures while in Fiji are the third highest amongst all the major markets.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

2022 APR-DEC VISITORS

UNITED STATES



69,897
JAN-DEC VISITORS

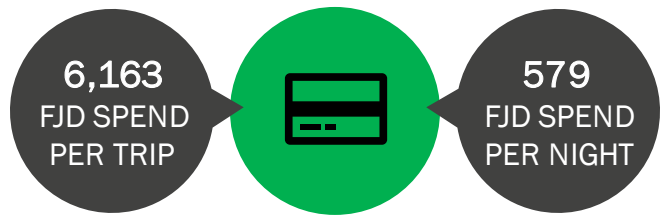
FJD 390M
TOTAL SPEND*

FJD 194M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



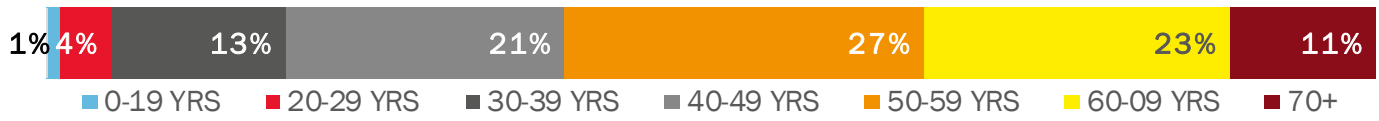
SPEND



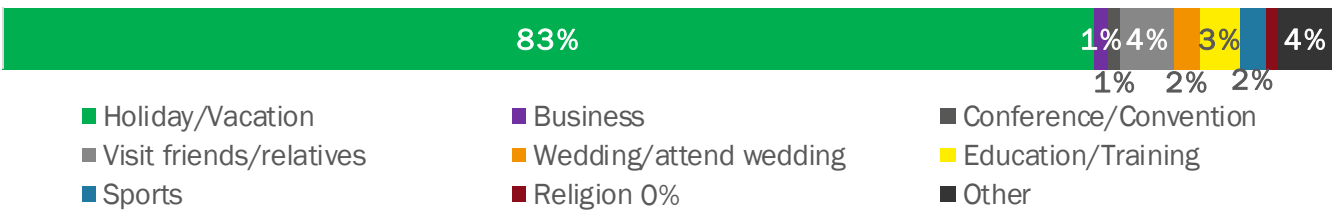
SATISFACTION



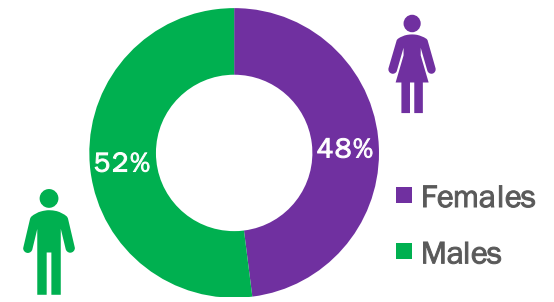
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



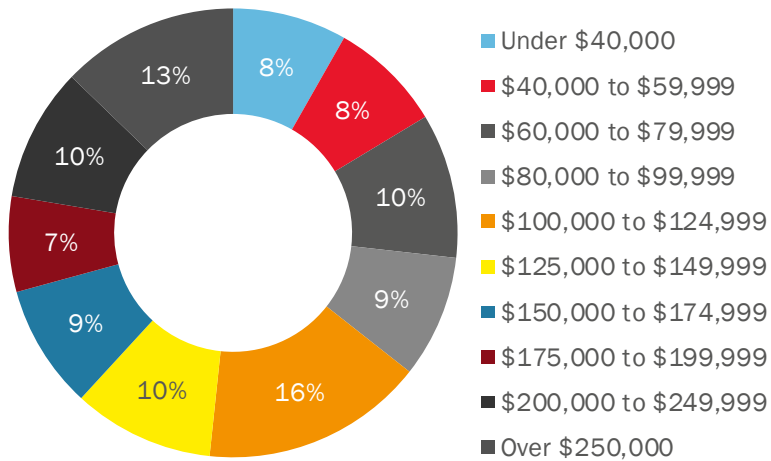
GENDER**



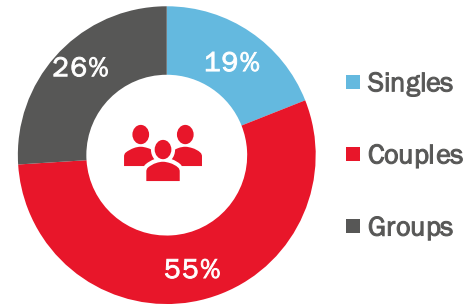
Just under 70K U.S. visitors arrived in Fiji in 2022, which was 11% of all visitors. From April to December, 63,282 visitors arrived from the U.S. Americans stayed almost 2 days longer in 2022 and spent considerably more. Per night spending increased from 517 FJD in 2019 to 579 FJD in 2022, and per trip spending increased from 4,673 FJD to 6,163 FJD, largely as a result of the extra nights. Overall satisfaction was high at 95% (and greater than 92% from 2019).

*By visitors who arrived from April to December 2022
**Characteristics of survey respondents only

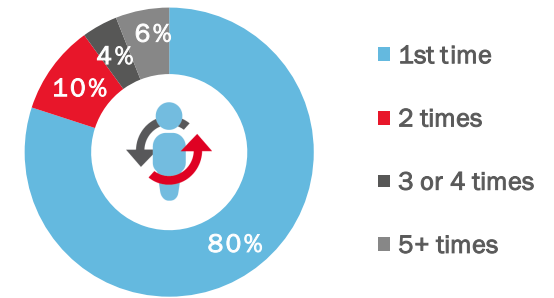
ANNUAL HOUSEHOLD INCOME (US\$)



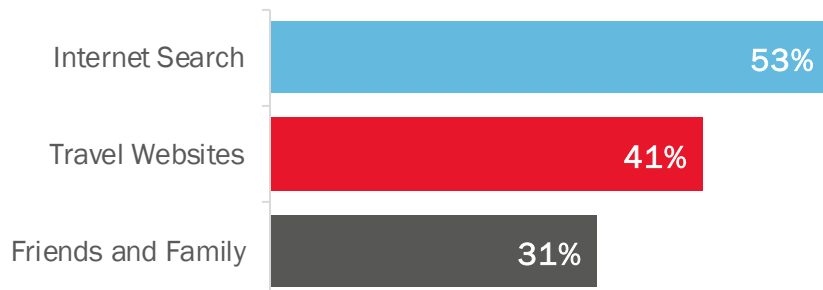
PARTY SIZE



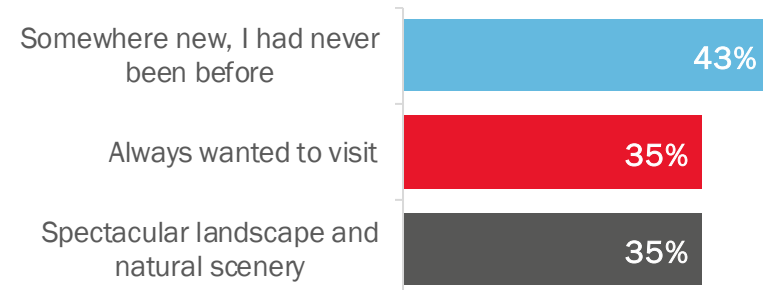
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



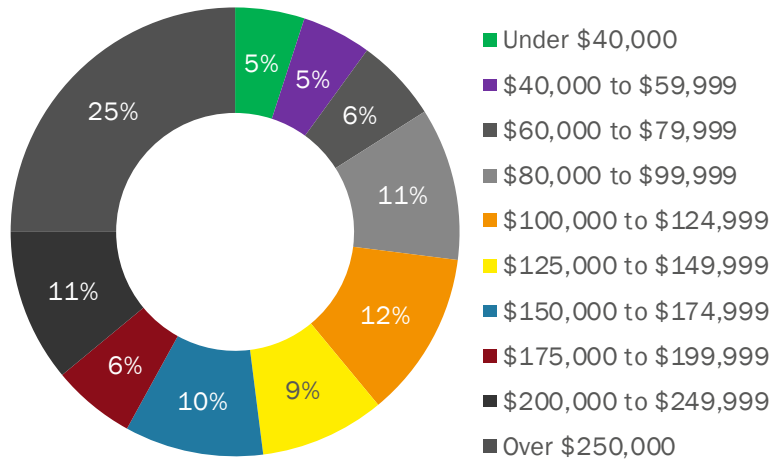
TOP INFLUENCING FACTORS FOR VISITING*



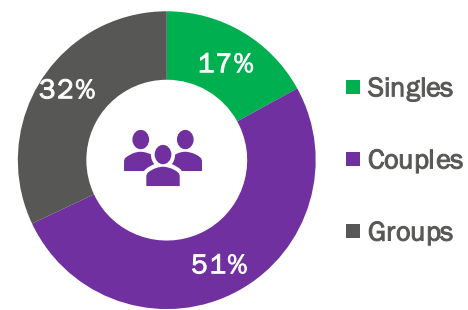
The U.S. market was mainly first-timers travelling as couples. Their average household income was slightly more than US\$125K. The main source of information on Fiji came from Internet searches and travel websites. Fiji appealed to those looking for a new adventure. Others came because Fiji was a dream destination on their bucket list. Visitors were also drawn to the reputation of amazing landscapes and scenery.

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

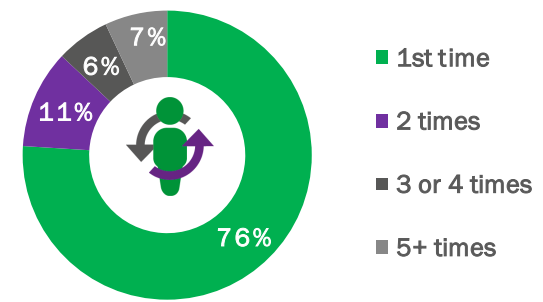
ANNUAL HOUSEHOLD INCOME (US\$)



PARTY SIZE



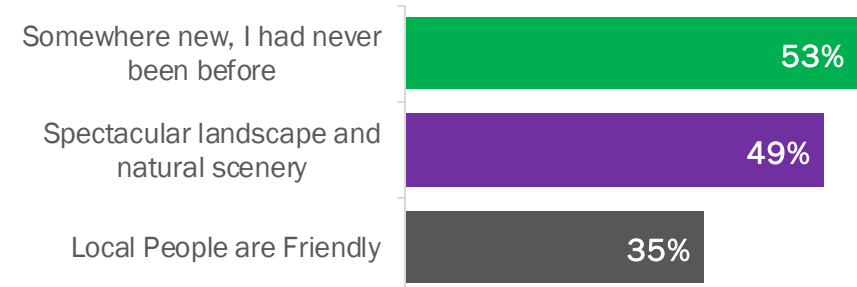
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

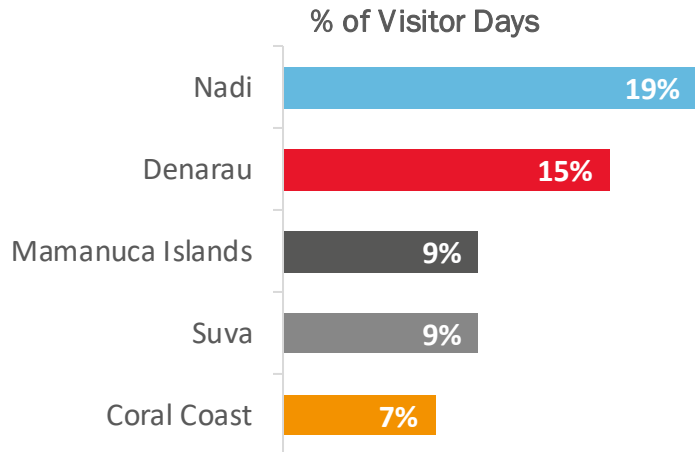


While U.S. travellers come from a variety of economic backgrounds, they too resemble Australian and New Zealand visitors in that 2022 visitors come from wealthier backgrounds. In 2019 visitors with household incomes of \$150K USD or greater comprised 39% of visitors; in 2022, that group comprised 52% of U.S. visitors. American visitors are mostly first-time visitors, and as a result relied heavily on the Internet and specific websites to plan their Fiji trip. As was the case in 2019, the top influencing factors for visiting was that Fiji was somewhere new these travellers had never been before and Fiji's natural beauty.

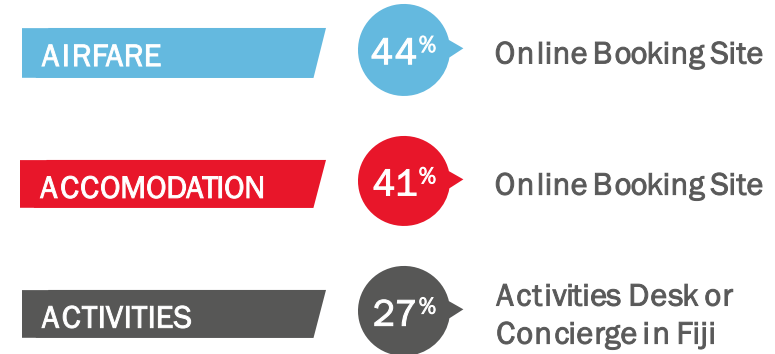
*Multiple responses, therefore, totals do not add up to 100%.



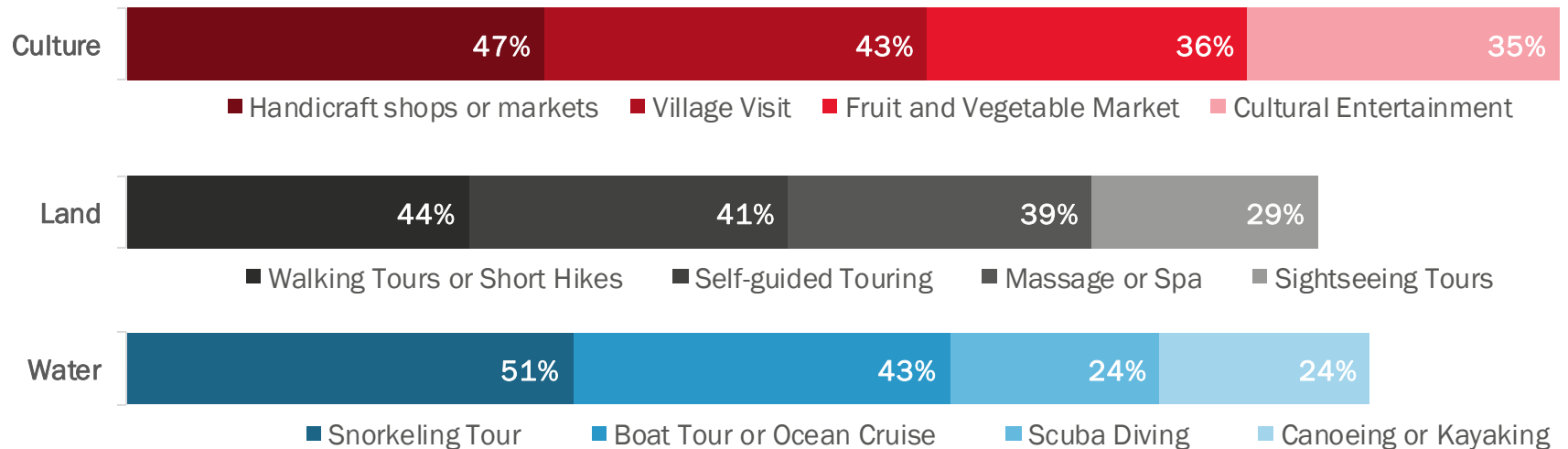
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

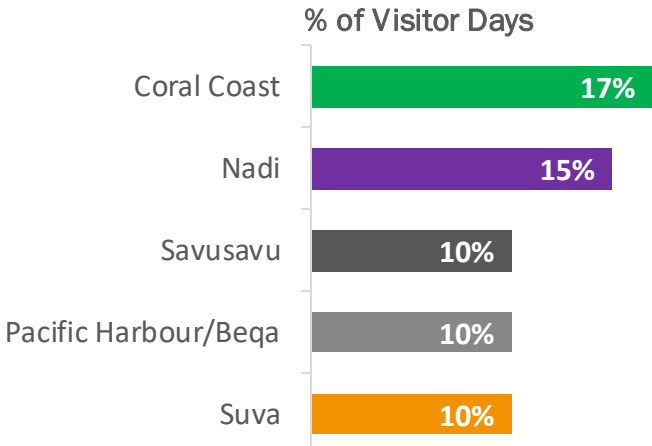


Nadi was the most popular destination for U.S. visitors and many also stayed in Denarau. U.S. visitors relied more on online methods for booking their travel than other markets. U.S. travellers were more inclined to visit handicraft markets and villages than seek cultural entertainment. They were more about self-guided tours or short hikes than more structured sightseeing tours. Though many did snorkelling and boat tours, there was a significant number that sought scuba diving activities.

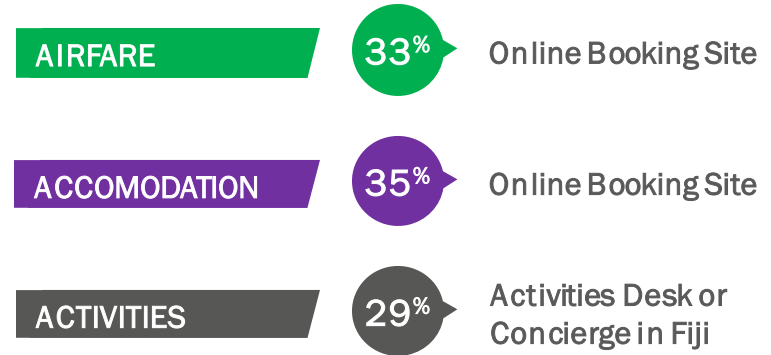
*Multiple responses, therefore, totals do not add up to 100%.



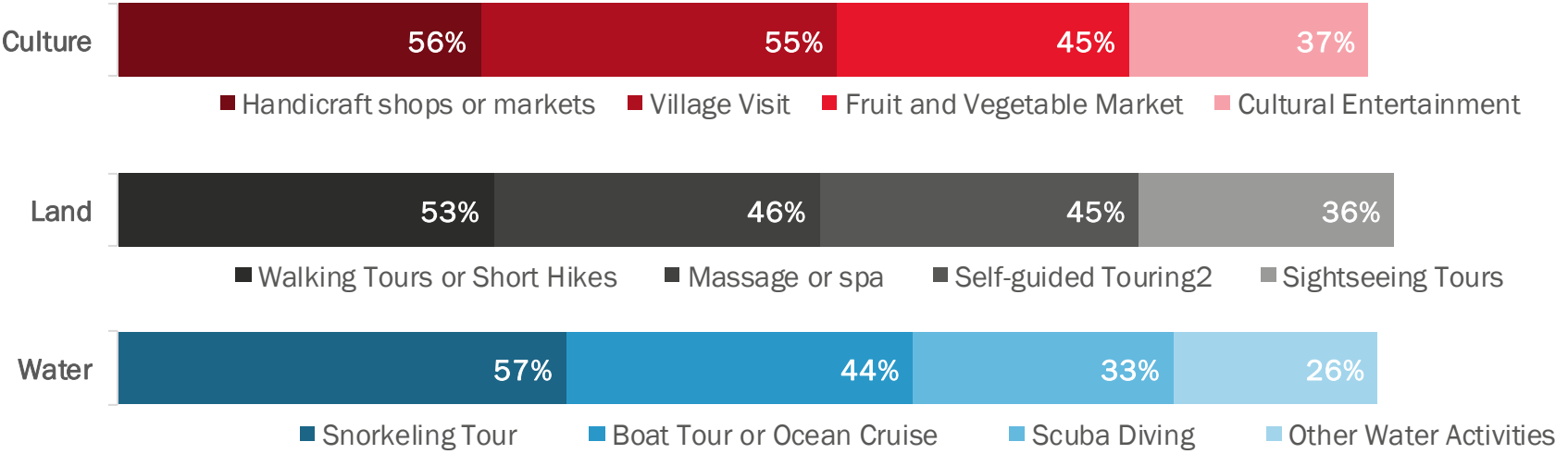
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

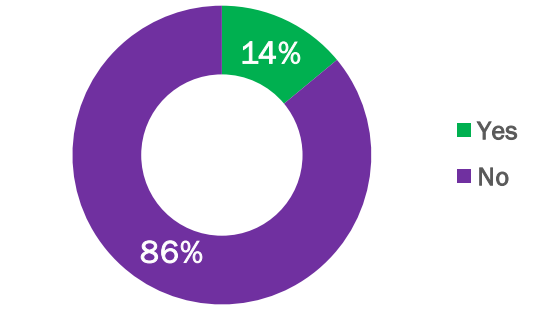
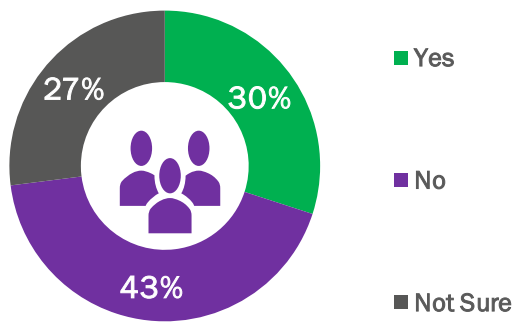


The travel behavior of Americans in 2022 was different in some ways than that of 2019. Whereas Nadi and Denarau were the top two regions visited by Americans in 2019, in 2022 the top two regions were the Coral Coast and Nadi. Likewise, Americans spent more time in Savusavu and Pacific Harbour/Beqa in 2022 compared to 2019. As with other markets, visitors from the U.S. participated in more activities in 2022 compared to 2019. They demonstrated affinities for shopping, village visits, walking tours, and snorkelling.

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

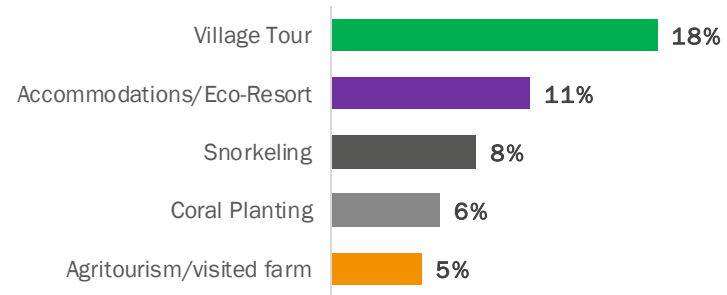
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

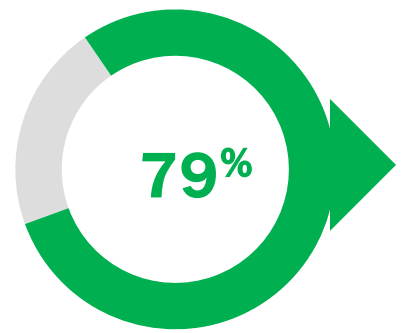
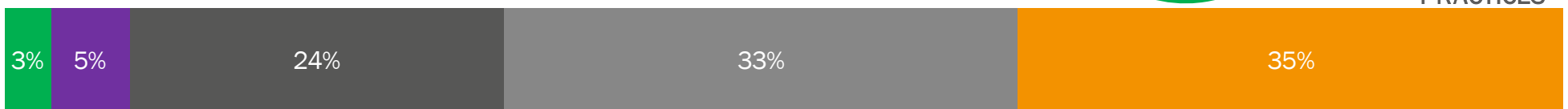


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

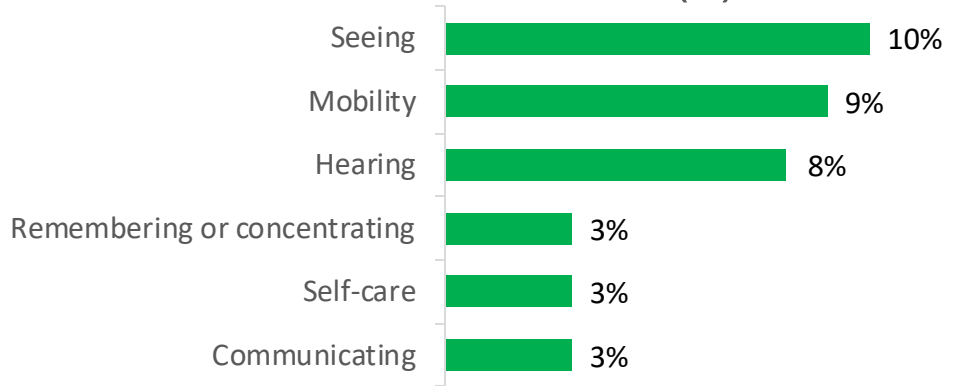


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

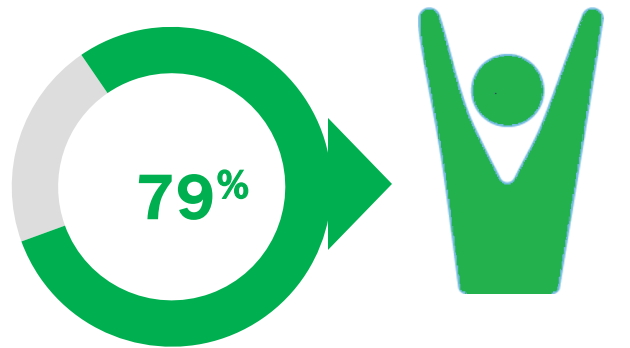
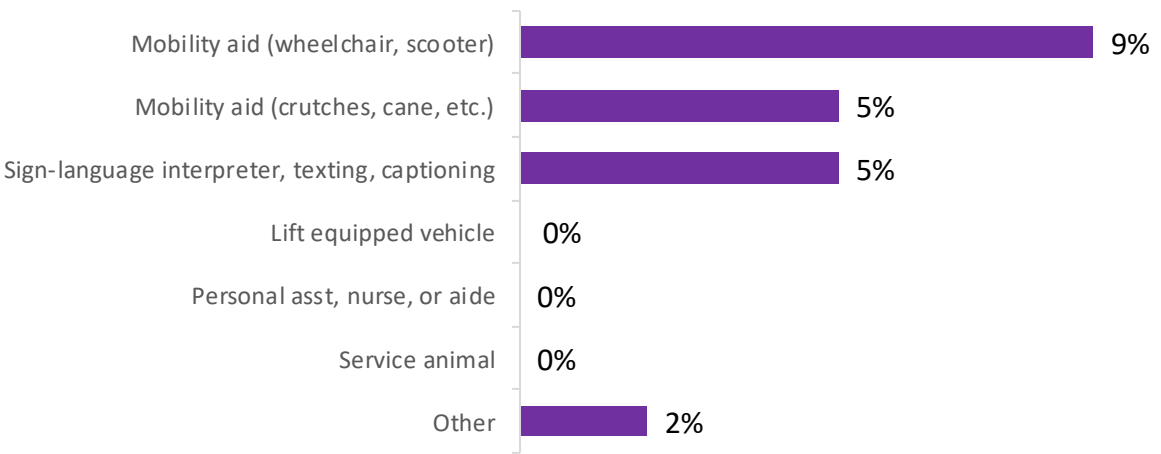
American visitors revealed more awareness of sustainability campaigns and slightly more participation in sustainable activities compared to visitors from Australia and New Zealand. They cited participation in village tours, staying at a sustainable resort, snorkelling, planting coral, and agritourism visits (e.g., chocolate farm) as the top sustainable activities in which they participated. Nearly 80% of Americans indicated they were satisfied with Fiji’s sustainable practices. Additionally, Americans expressed contentment with their trips. Approximately 8% indicated their trip was less enjoyable than expected, 24% revealed it was about what was expected, and 68% indicated it was more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY



SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

Nearly 10% of all U.S. parties revealed someone in the party had difficulties with sight, mobility, or hearing. The most utilized assistance included electric mobility aids like wheelchairs and scooters, and to a lesser extent, non-electric mobility aides (crutches, canes), and auditory language assistance. Of those who could answer, 79% indicated they were satisfied with Fiji's accessibility for disabled persons.

2019

CANADA



13,269

TOTAL VISITORS

FJD 104M

TOTAL SPEND

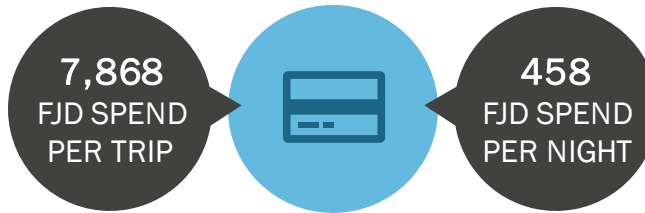
FJD 71M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



SPEND



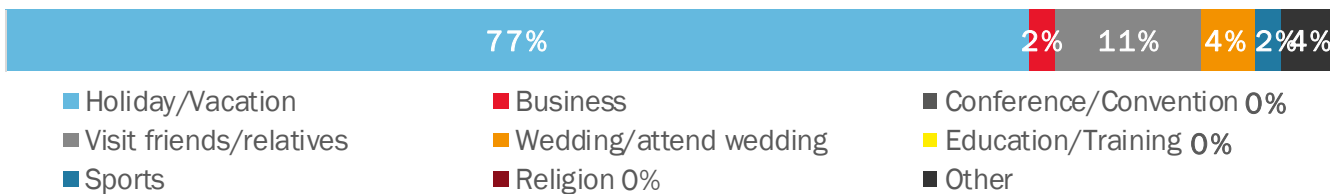
SATISFACTION



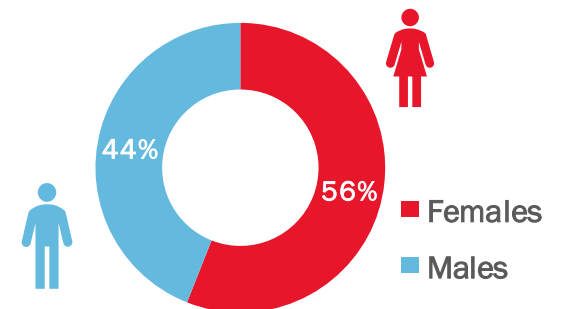
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



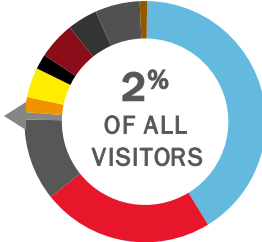
The Canadian market accounted for only 1.5 percent of the visitations and growth was flat at +0.4% over 2018. Canadian visitors spent twice as long as the average visitor in Fiji and therefore their total spending per person per trip was the highest.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

2022 APR-DEC VISITORS

CANADA

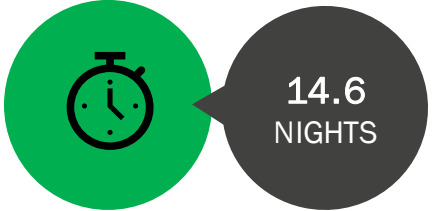


9,879
JAN-DEC VISITORS

FJD 56M
TOTAL SPEND*

FJD 22M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



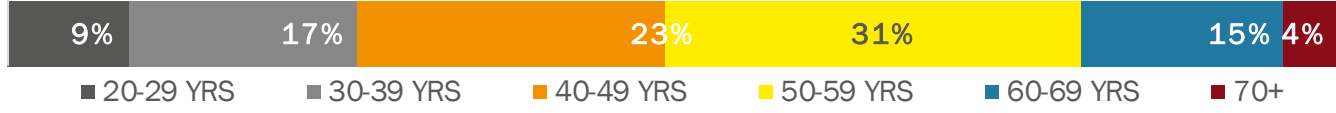
SPEND



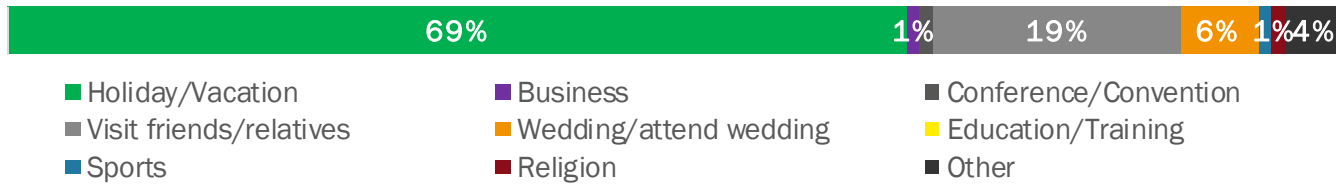
SATISFACTION



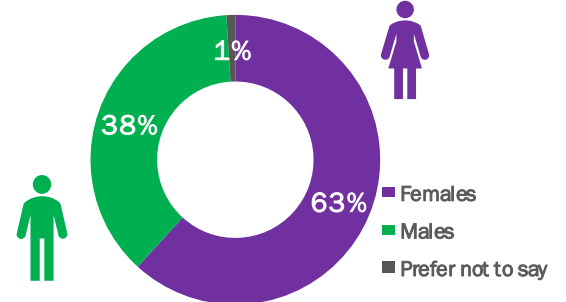
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



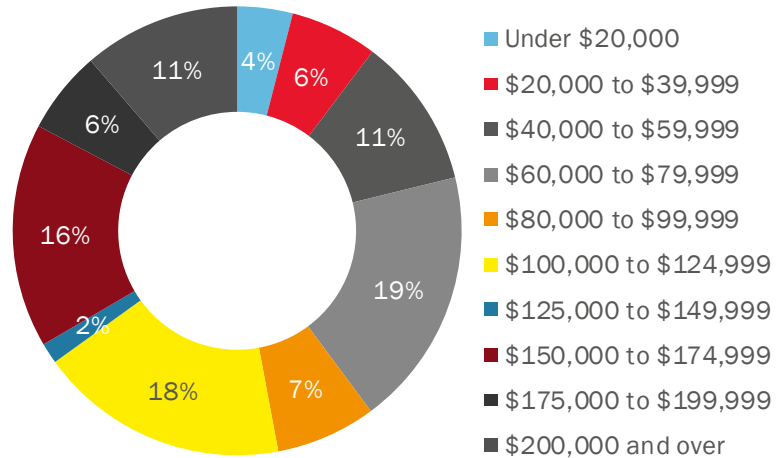
GENDER**



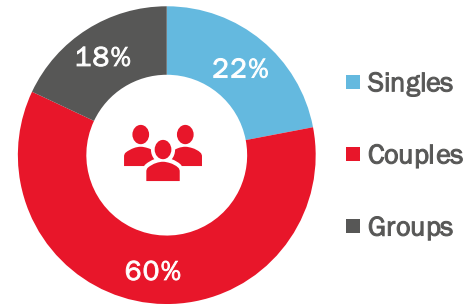
Canadians were just under 2% of all visitors in both 2019 and 2022. In 2022, 9,879 Canadian residents visited Fiji. From April to December, 9,275 Canadian visitors arrived. Visitors spent less time and money in 2022 compared to 2019. In 2022, they spent an average of 14.6 nights (down from 17.2 in 2019), 414 FJD per night (down from 458 FJD in 2019), and 6,024 per trip (down from 7,868 FJD in 2019). Fewer travellers visited Fiji on holiday/vacation in 2022, which was offset by a greater number visiting friends and relatives. Satisfaction remained high at 88%, which was slightly greater than 86% in 2019.

*By visitors who arrived from April to December 2022
 **Characteristics of survey respondents only; no party heads younger than 20 years old
 Note: Sample size is relatively small.

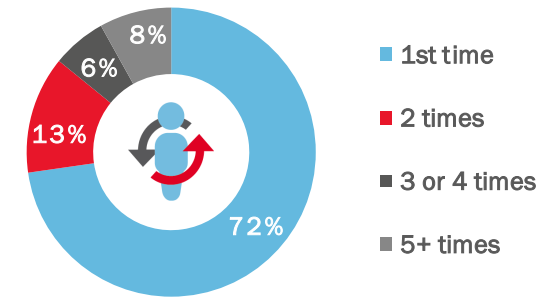
ANNUAL HOUSEHOLD INCOME (CAN\$)



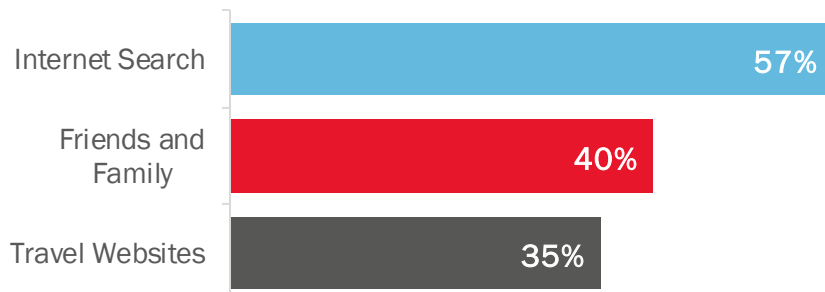
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

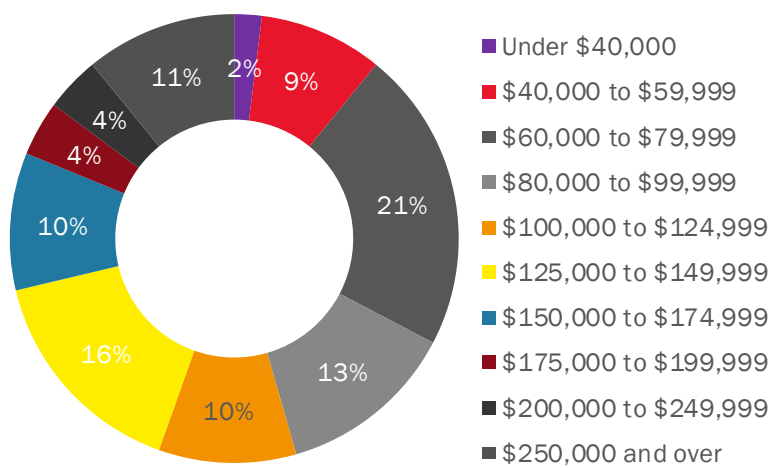


Canadian household income was broadly spread in the middle categories of between CAN\$60K and CAN\$175K. Many Canadians travel in pairs. For most, this was their first trip to Fiji. Online sources such as Internet searches and travel websites were major sources of information but also word of mouth from friends and relatives was also important. Like the Americans, Canadians wanted to visit Fiji because it was a dream destination.

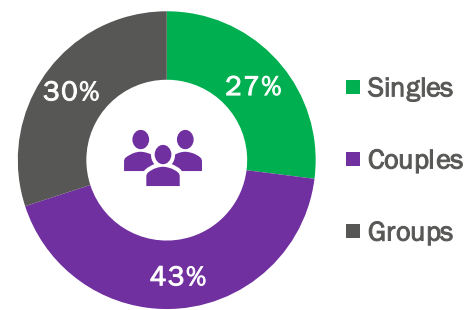
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

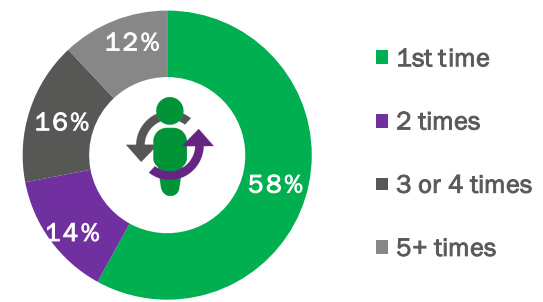
ANNUAL HOUSEHOLD INCOME (CAN\$)



PARTY SIZE



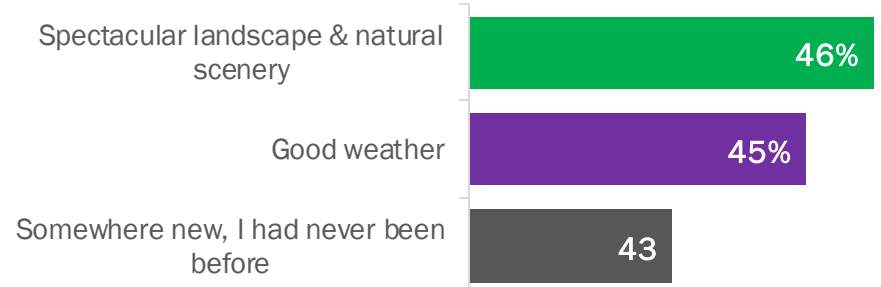
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



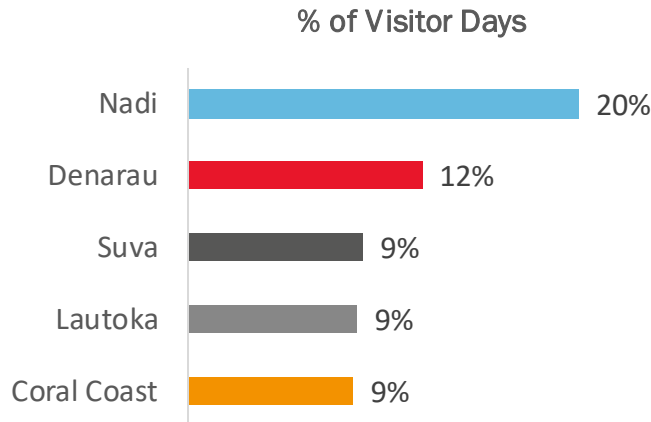
The characteristics of Canadian visitors were somewhat different in 2022 compared to 2019. To begin, visitors in 2022 were slightly more affluent and included a slightly larger number of female heads of parties. In 2022, fewer visitors arrived as couples (43% compared to 60%), and more arrived as members of groups (30% compared to 18%). Whereas 72% of Canadians were first-time visitors in 2019, 58% were first time visitors in 2022. Travelers still relied on the Internet and friends and family in 2022, but factors such as natural beauty and good weather were more influential to Canadians.

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

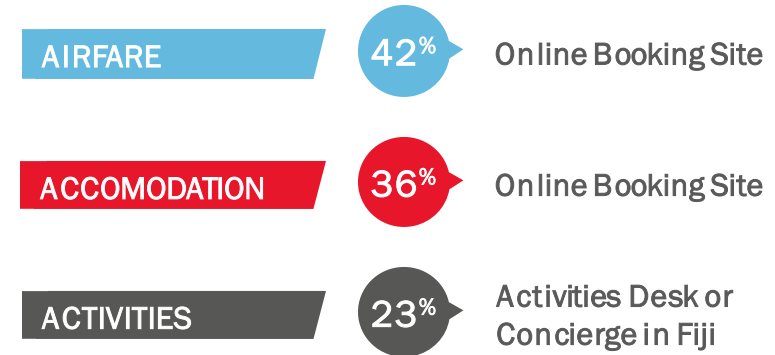
Note: Sample size is relatively small.



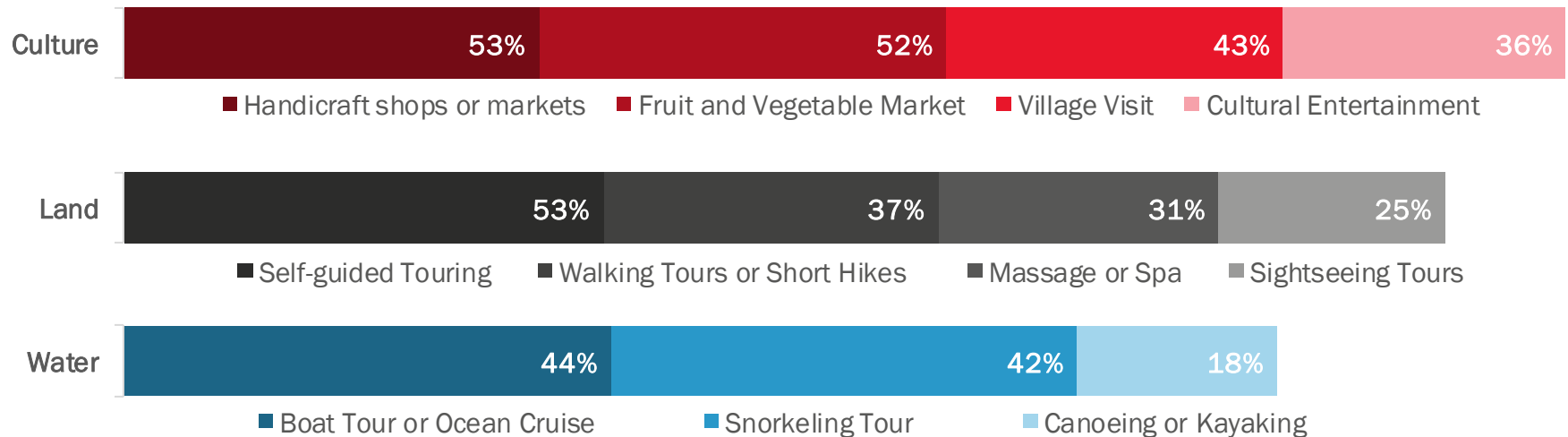
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

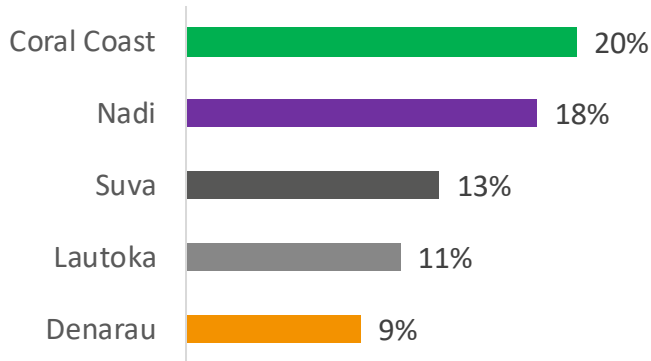


Beside a slight preference for Nadi, Canadians were distributed similarly across Denarau, Suva, Lautoka, and Coral Coast. Airfare and accommodations were mainly booked through online sites. Canadians took advantage of cultural experiences with many visiting handicraft and fruit markets and also participating in village visits. More than half of all Canadian visitors took up self-guided touring. Boat and snorkelling tours were equally popular.

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

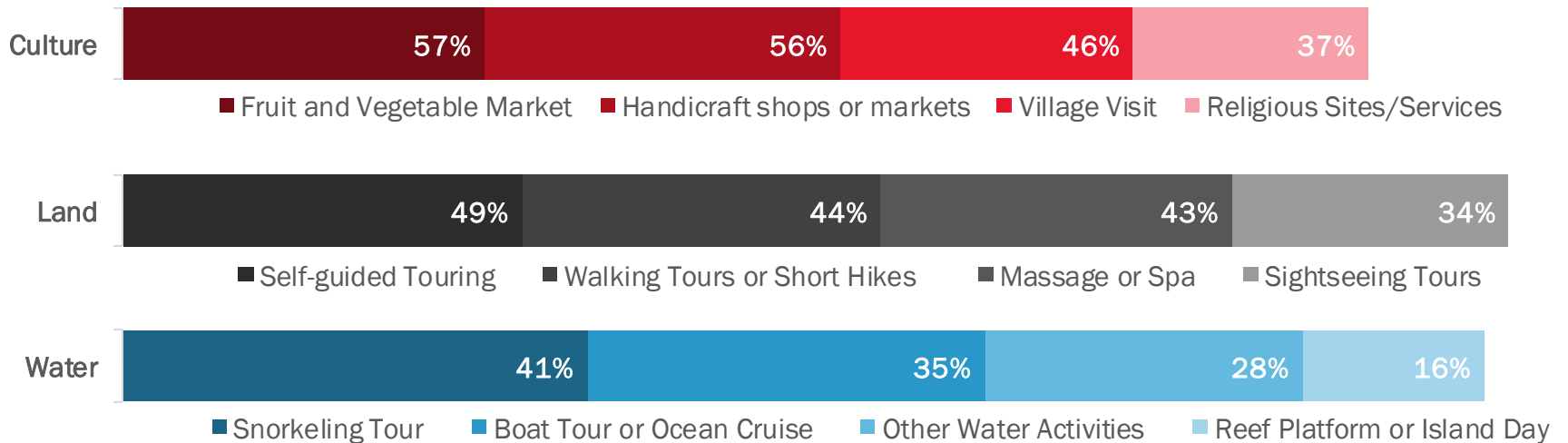
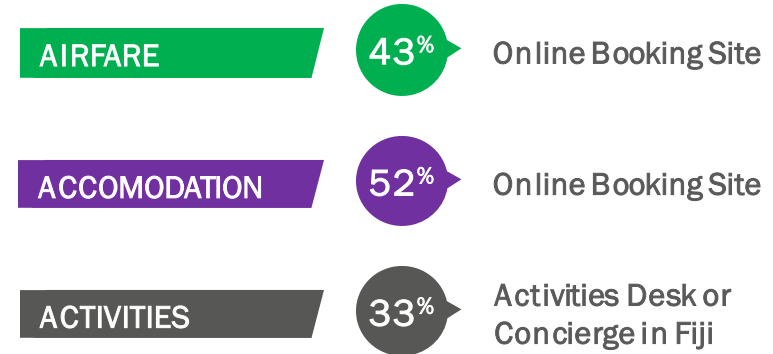
Note: Sample size is relatively small.

% of Visitor Days



TOP 5 REGIONS VISITED

TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

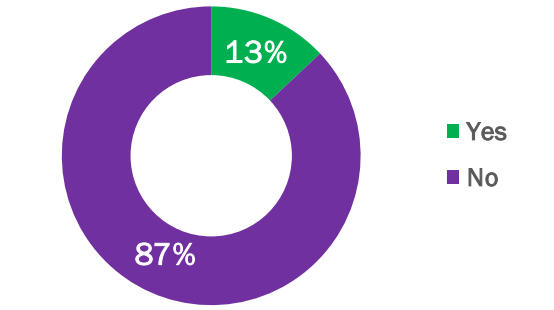
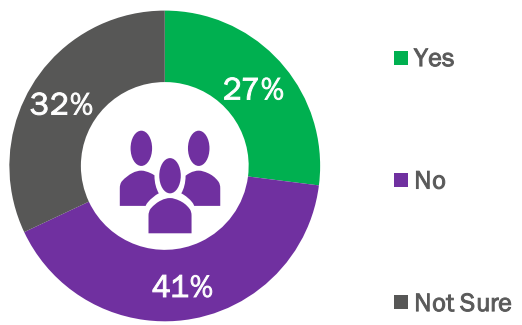
Changes in the composition of Canadian visitors from 2019 to 2022 also impacted the regions visited in 2022. While Nadi was the most visited region in 2019, the Coral Coast was the most visited region in 2022. In spite of these changes, Canadians relied on the same top methods for booking travel, and participated in many of the same activities (with the same frequency) in 2022 as they did in 2019.

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

Note: Sample size is relatively small.

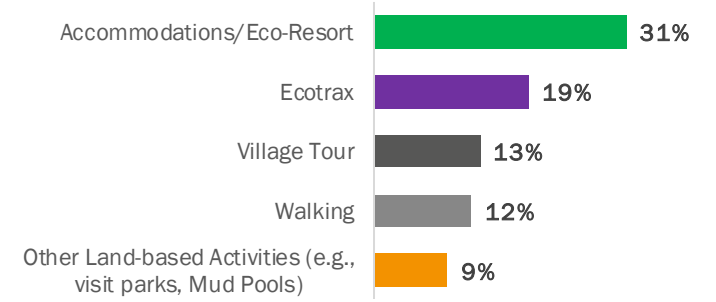
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

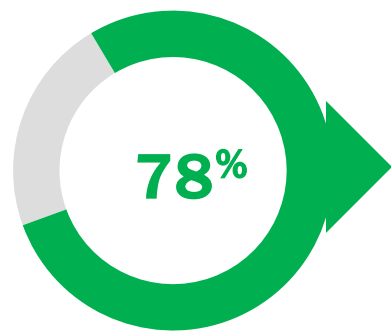
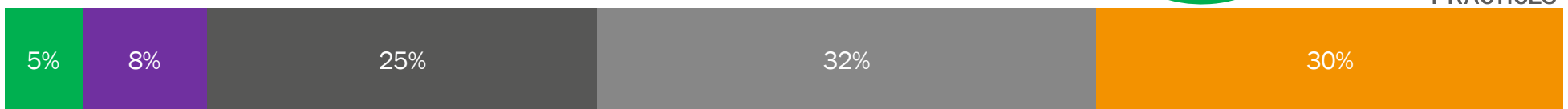


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

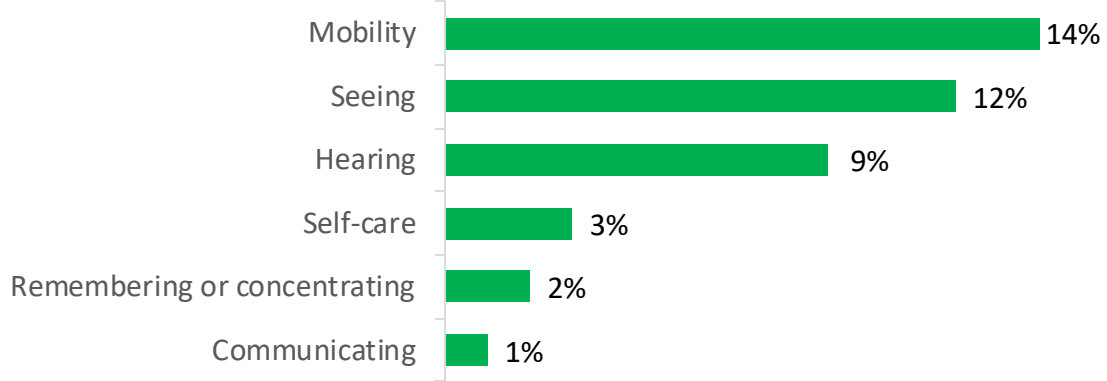


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

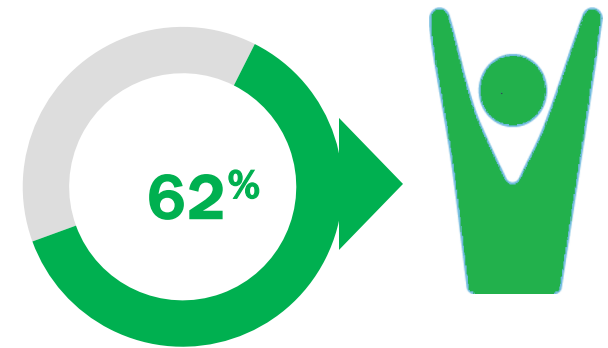
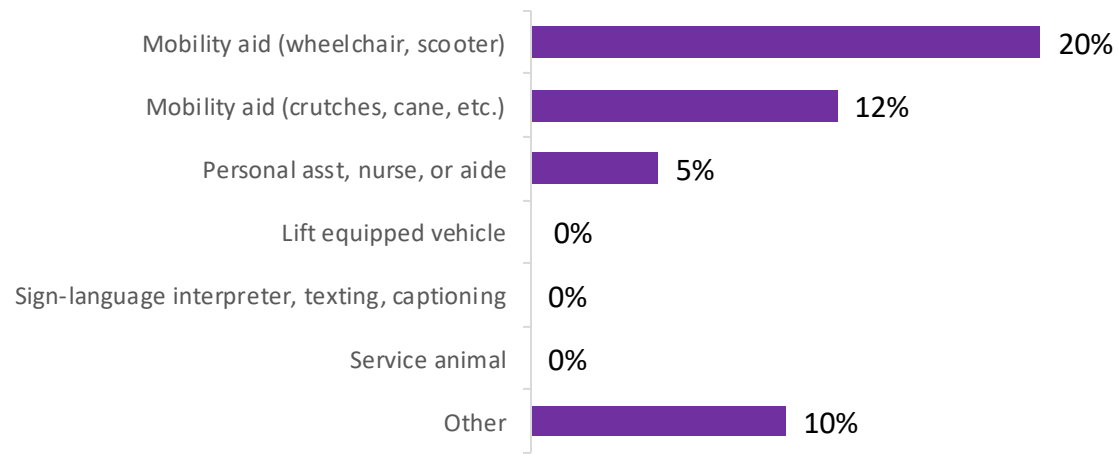
Canadians resembled Americans in terms of their awareness of sustainability campaigns and their participation in activities promoted as sustainable. Among those who participated in sustainable activities, Canadians referenced staying in a sustainable resort, using Ecotrax, taking a village tour, walking, and enjoying other land-based activities, such as visiting national parks, botanical gardens, or the Mud Pools. Nearly 80% of Canadians noted satisfaction with Fiji’s sustainable practices. Canadians, like other residents, indicated they were content with their visits. Approximately 13% indicated they trip was below expectations, 25% noted it met expectations, and 62% stated their trip was much more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

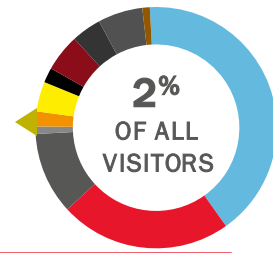


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

Canadian parties included travellers with more difficulties than other market areas. Canadians included a larger proportion of travellers with mobility issues compared to other travellers. Perhaps unsurprisingly, a larger proportion of Canadian travellers used electric mobility aids (like wheelchairs or scooters) and non-electric mobility aids (like crutches and canes). Of those who could answer, 62% expressed satisfaction with accessibility for disabled persons.

2019

UNITED KINGDOM



16,856

TOTAL VISITORS

FJD 77M

TOTAL SPEND

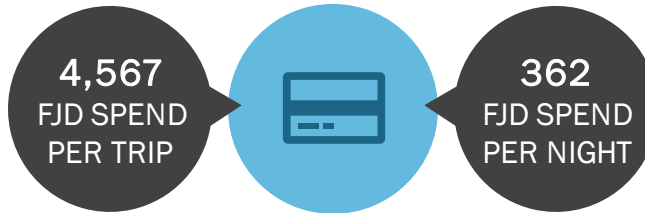
FJD 55M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



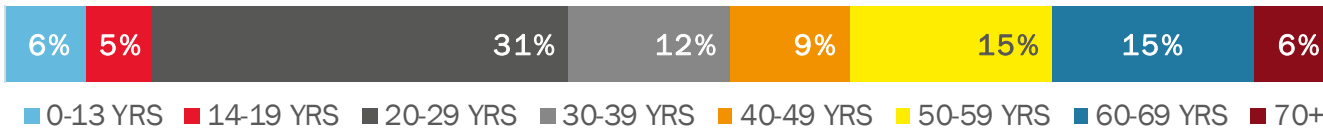
SPEND



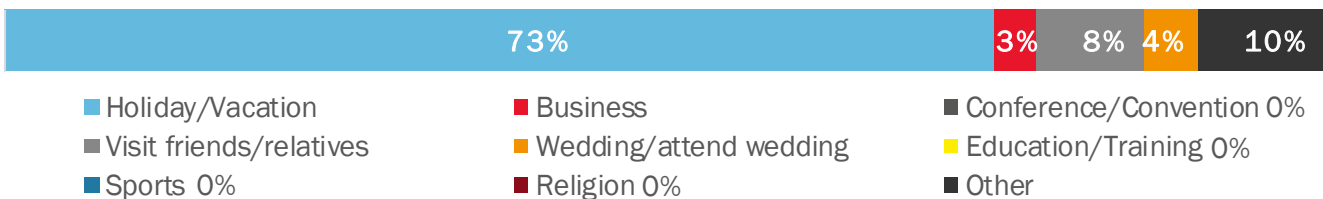
SATISFACTION



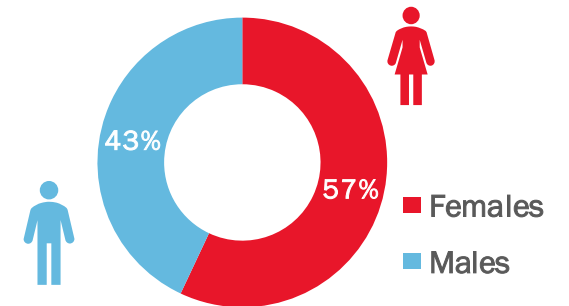
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



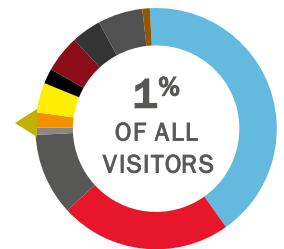
The number of visitors from the UK increased +3.4% over last year. UK visitors were more satisfied than most other visitors. There were slightly more females than males visiting. The greater part of the spending was committed through the pre-paid package and the international airfare (71%).

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

2022 APR-DEC VISITORS

UNITED KINGDOM



5,888
JAN-DEC VISITORS

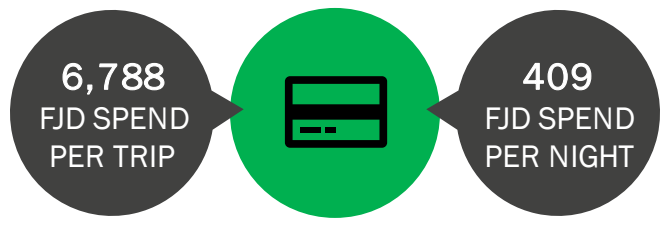
FJD 38M
TOTAL SPEND*

FJD 20M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



SPEND



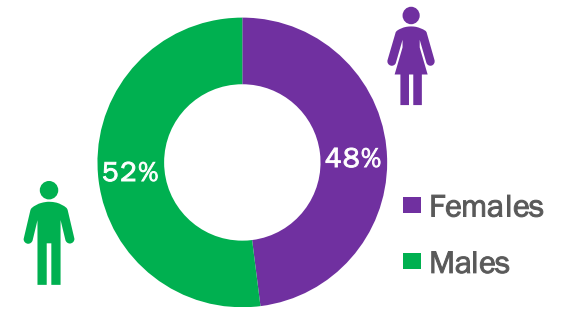
SATISFACTION



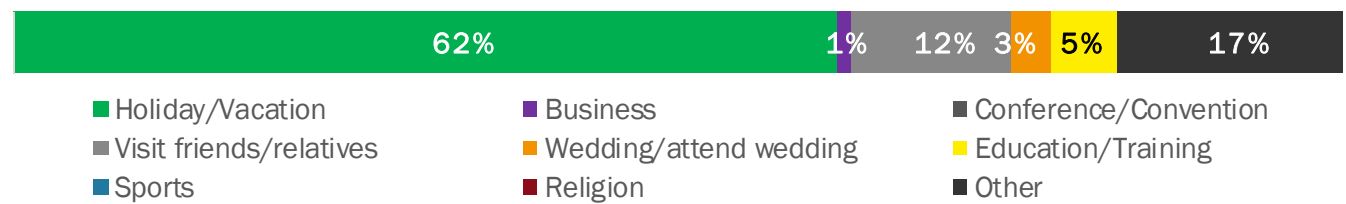
AGE OF PARTY HEAD**



GENDER**



PURPOSE OF VISIT (%)

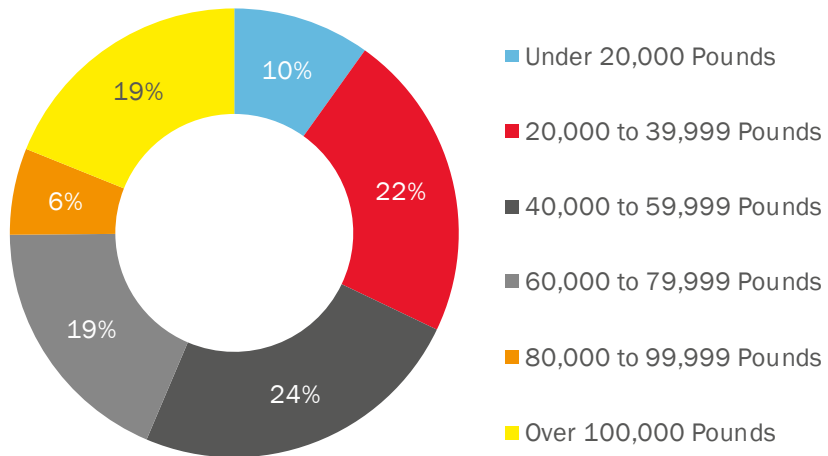


Fiji welcomed 5,888 visitors from the U.K. in 2022, 5,535 of which arrived between April and December. Visitors from the U.K. represent less than 1% of all visitors, which was their distribution in 2019. Compared to 2019, UK visitors stayed longer (16.6 nights compared to 12.6 nights), spent more per night (409 FJD compared to 362 FJD), and spent more per trip (6,788 FJD compared to 4,567 FJD). Likewise, satisfaction was greater in 2022 (98%) compared to 2019 (93%).

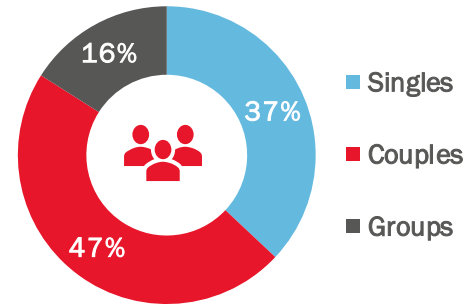
*By visitors who arrived from April to December 2022
**Characteristics of survey respondents only

Note: Sample size is relatively small.

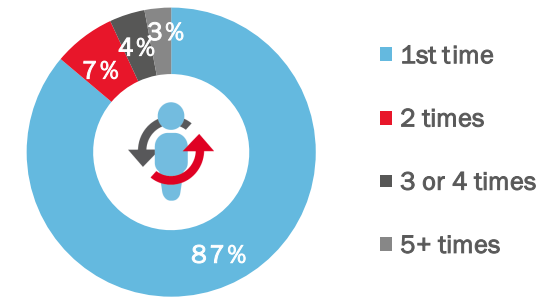
ANNUAL HOUSEHOLD INCOME (GBP)



PARTY SIZE



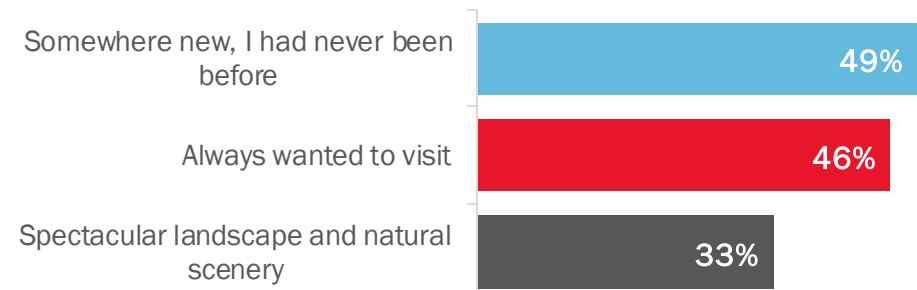
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

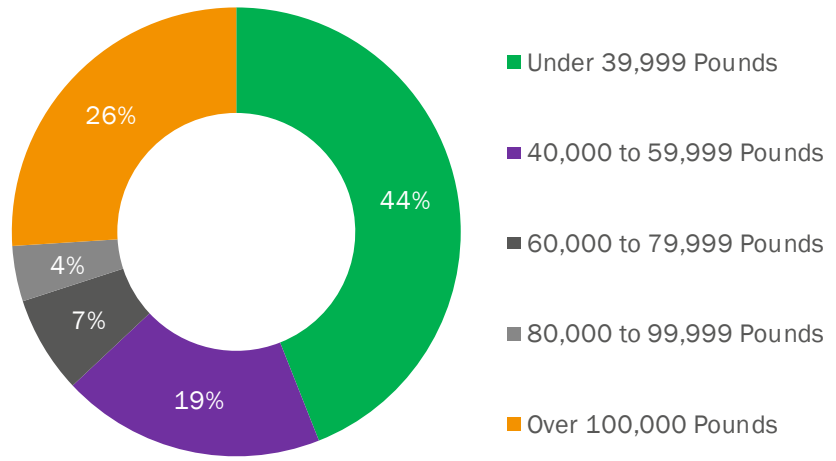


More than half of the visitors had an income of less than £60K. Almost 4-in-10 British visitors were traveling alone, with mostly all being their first trip to Fiji. Like the Americans, Internet search was the predominate source of information for the British, with additional support from travel websites and recommendations from friends and family. Similarly, given high number of first time visitors, the British see Fiji as a bucket list or aspirational destination.

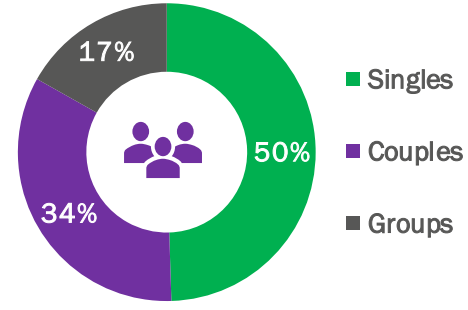
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

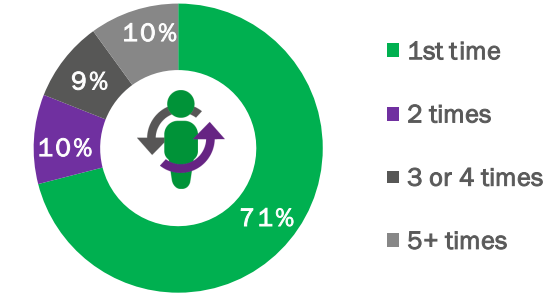
ANNUAL HOUSEHOLD INCOME (GBP)



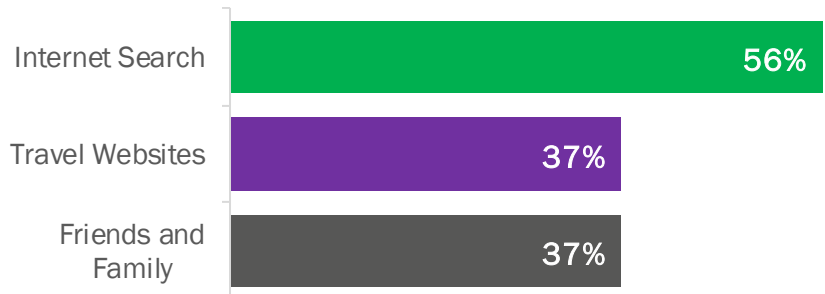
PARTY SIZE



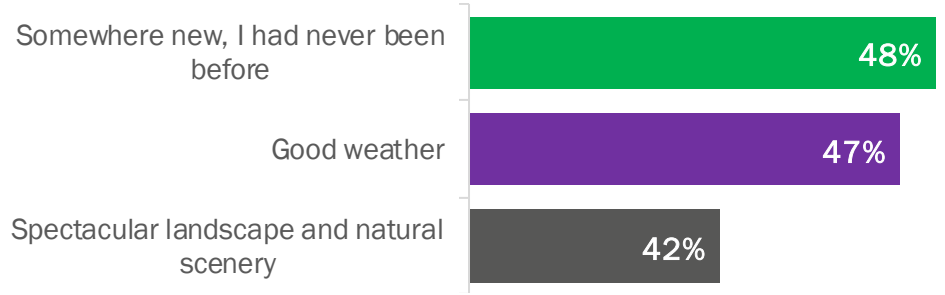
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



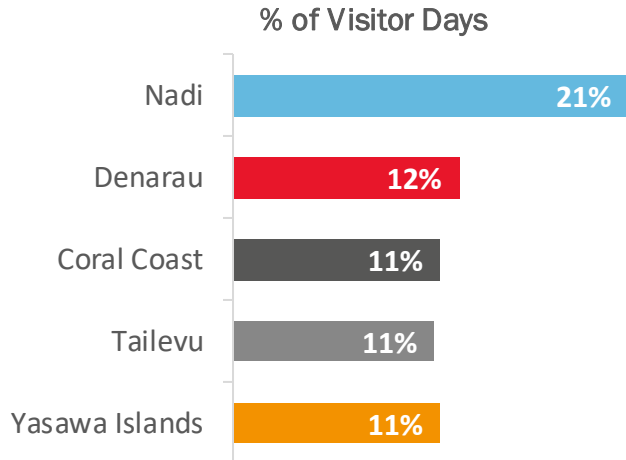
Like Canadians, the composition of UK visitors was somewhat different in 2022 compared to 2019. In 2022, UK visitors included a larger proportion of male party heads and more affluent households. The proportion of single travellers increased (from 37% to 50%) while the proportion of couples decreased (47% to 34%), and the percentage of first-time travellers dropped from 87% to 71%. Despite changes in party composition, the top information sources used from planning remain the Internet and friends and family, and the top factor for visiting remains that Fiji is somewhere new, followed closely by Fiji's good weather.

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

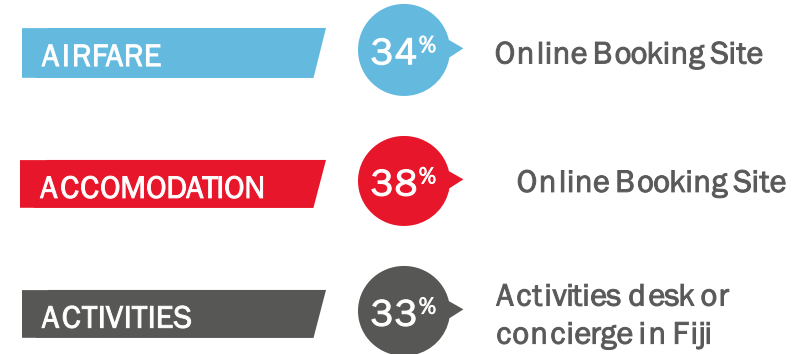
Note: Sample size is relatively small.



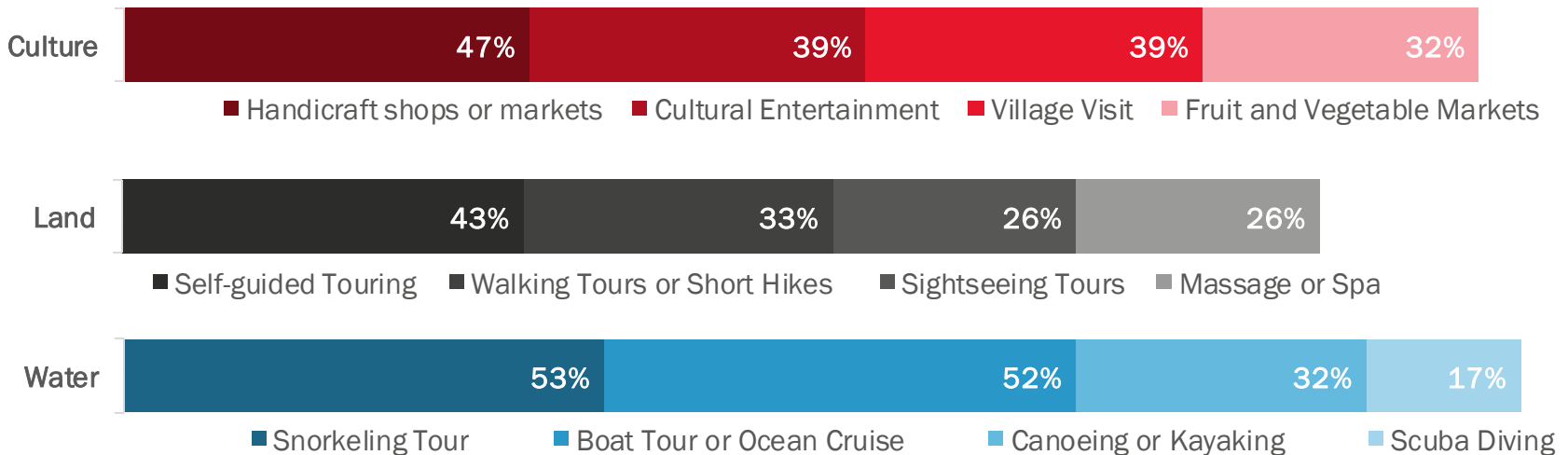
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

Note: Sample size is relatively small.

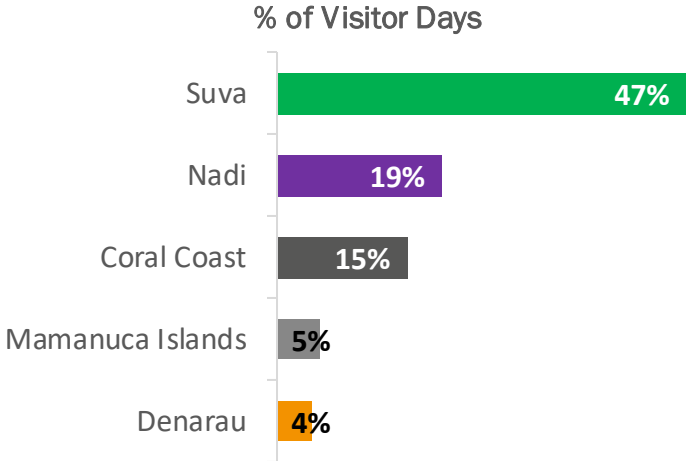
Beyond visits to Nadi, British visitors were equally likely to be found in Denarau, Coral Coast, Tailevu, or the Yasawa Islands. The main method for booking airfare and accommodations was through online booking sites. A third of visitors booked activities after arriving in Fiji. More than half did snorkelling tours or boat tours.

2022 APR-DEC VISITORS

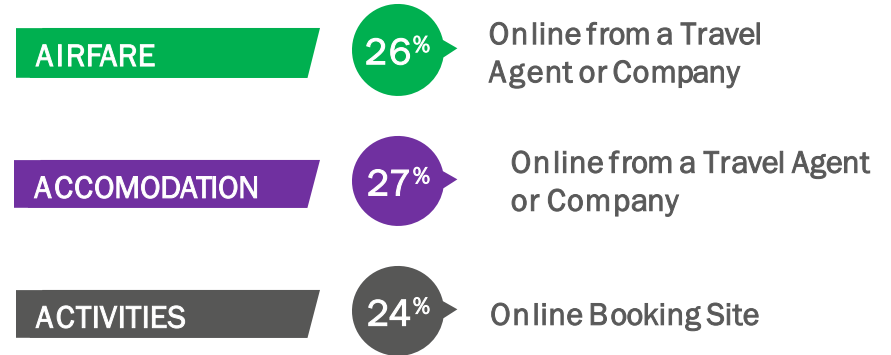
UNITED KINGDOM



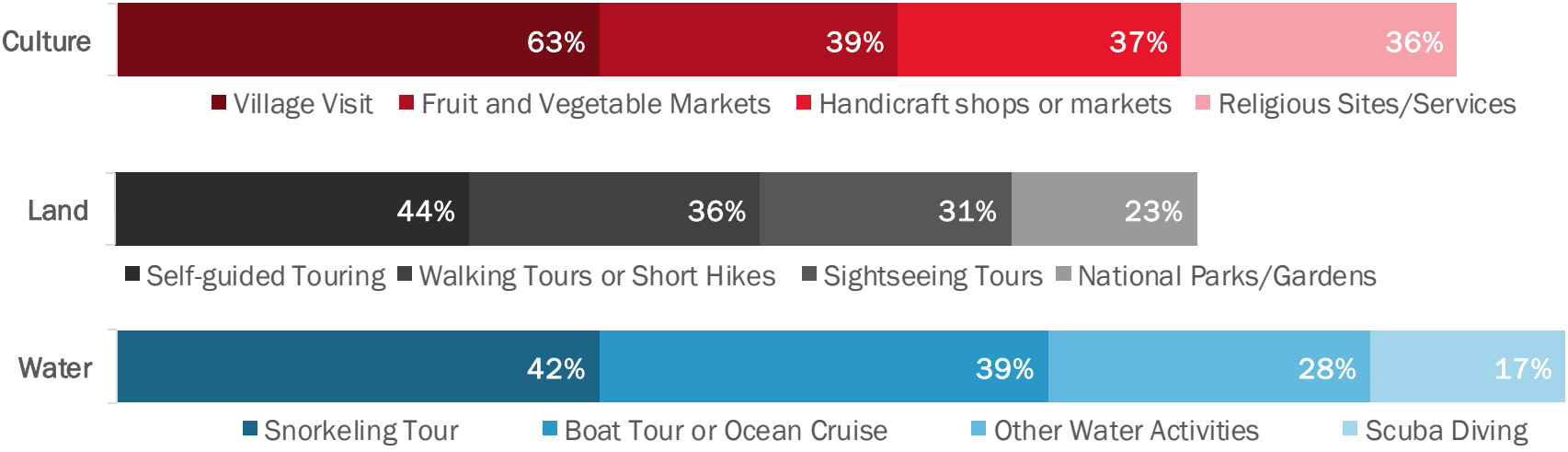
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



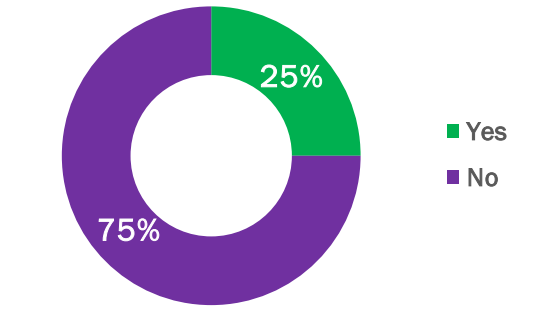
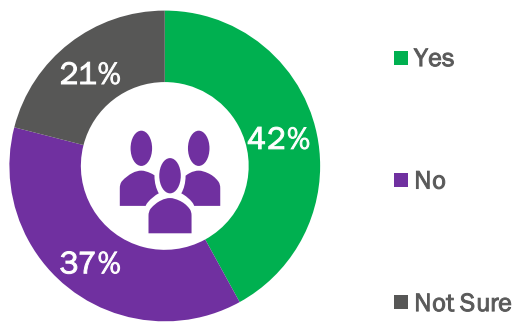
The changes in the composition of U.K. travellers from 2019 to 2022 appear to have impacted other behaviors. Whereas the top region visited by U.K. visitors in 2019 was Nadi (at 21%), in 2022 the top region was Suva (at 47%). Additionally, while U.K. travellers preferred online booking sites for airfare and accommodations in 2019, in 2022, they preferred booking online from a travel agent or company. In terms of activities, U.K. visitors showed a proclivity for village visits in 2022, but a reduction nearly all prominent water activities from 2019.

*Multiple responses, therefore, totals do not add up to 100%.
Note: Sample size is relatively small.

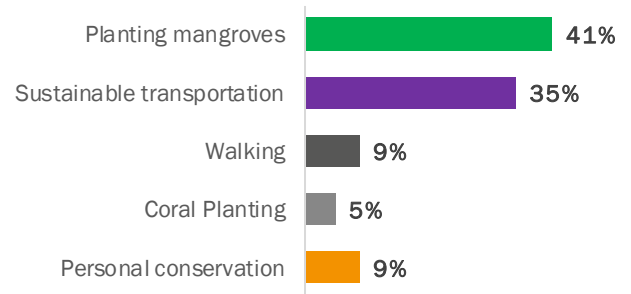
SUSTAINABILITY

TOP SUSTAINABLE ACTIVITIES

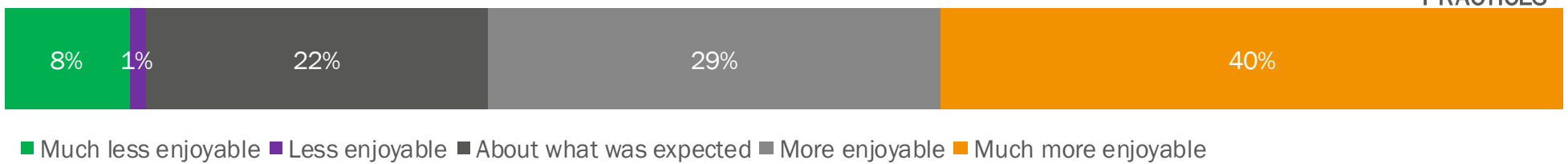
AWARENESS OF SUSTAINABILITY CAMPAIGNS



PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT



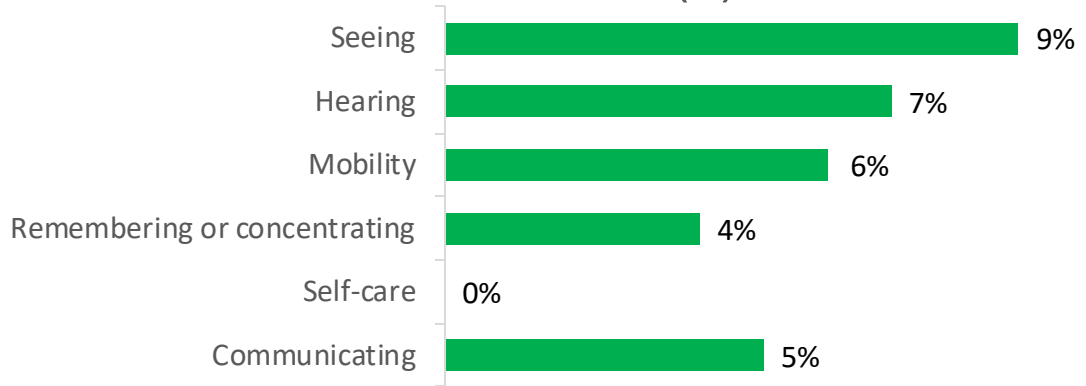
TRIP EXPECTATION COMPARISONS(%)



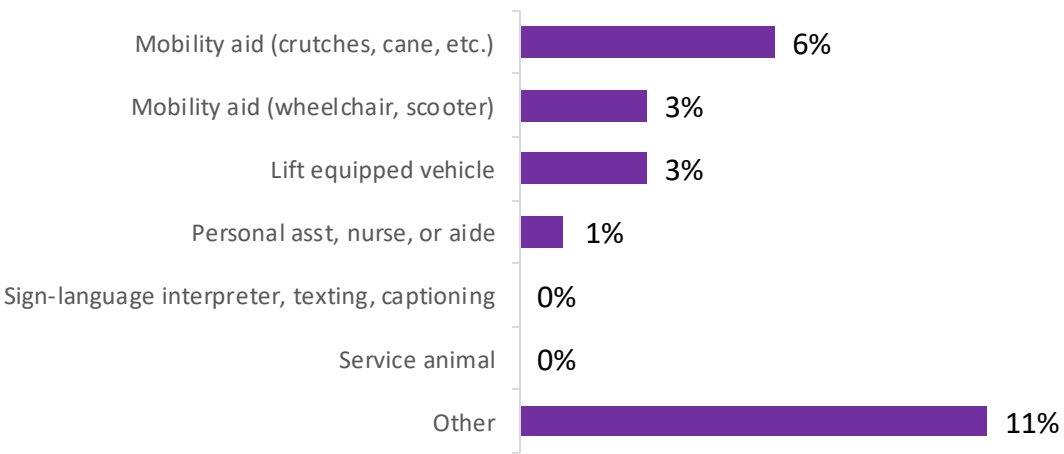
Visitors from the U.K. revealed the greatest awareness of sustainability campaigns and the second highest participation in activities promoted as sustainable. Activities referenced included planting mangroves, using sustainable transportation, walking, planting coral, and personal conservation, such as using reusable water bottles. Just under 70% stated they were satisfied with Fiji’s sustainable practices. U.K. residents also confirmed their satisfaction with their trip to Fiji. Approximately 9% revealed the trip was less enjoyable than expected, 22% thought it met expectations, and 69% found it more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

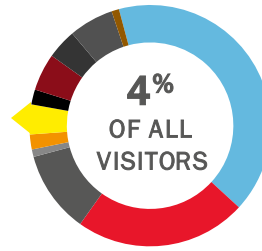


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

U.K. visitors travelled in parties that include persons with difficulties seeing, hearing, moving, remembering or concentrating, and communicating. A small proportion of these parties indicated persons in their parties used both electric and non-electric mobility aids, lift equipped vehicles, and personal assistants. Of those who could answer, 81% of U.K. visitors stated they were satisfied with Fiji’s accessibility for disabled persons.

2019

CONTINENTAL EUROPE



36,058

TOTAL VISITORS

FJD 212M

TOTAL SPEND

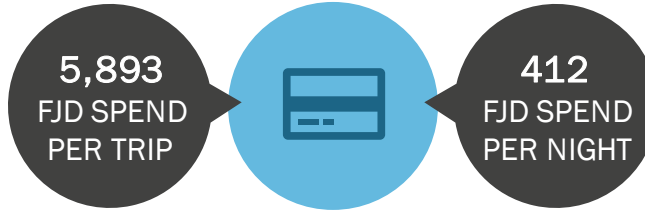
FJD 146M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



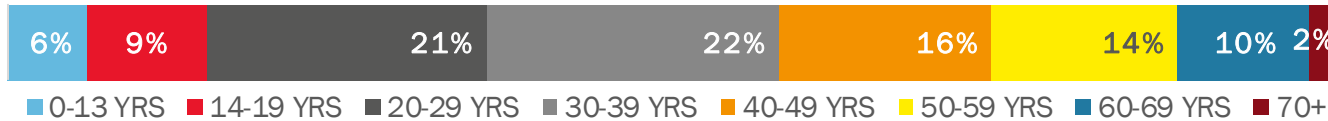
SPEND



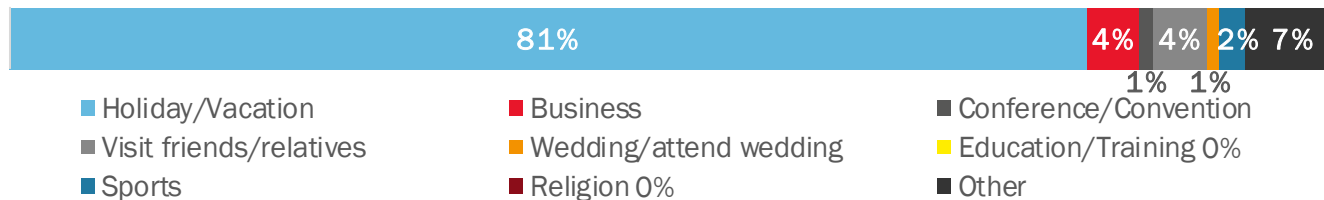
SATISFACTION



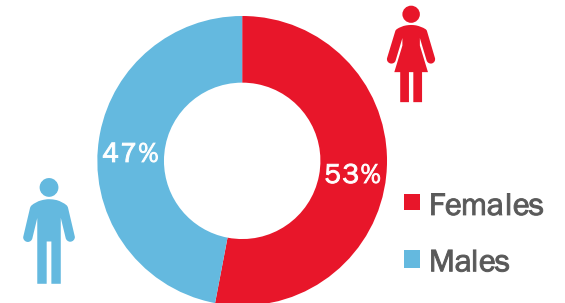
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

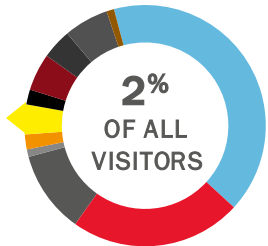


European travellers accounted for 4% of all visitors and actually showed a decline in visitation for 2019 (-3.7%). They stayed the third longest amongst all the major markets (14.3 nights) and were also younger. Compared to their U.K. neighbours, they spent slightly more per night and for their total trip.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

2022 APR-DEC VISITORS

CONTINENTAL EUROPE

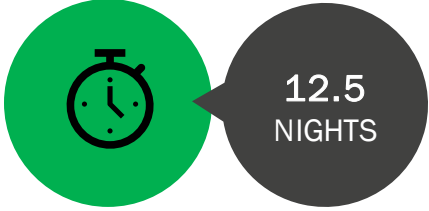


10,817
JAN-DEC VISITORS

FJD 81M
TOTAL SPEND*

FJD 44M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



SPEND



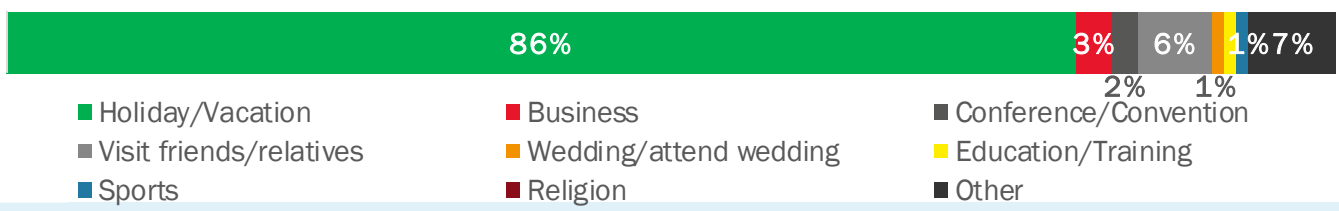
SATISFACTION



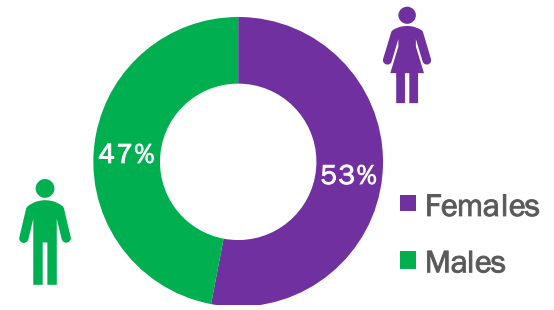
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



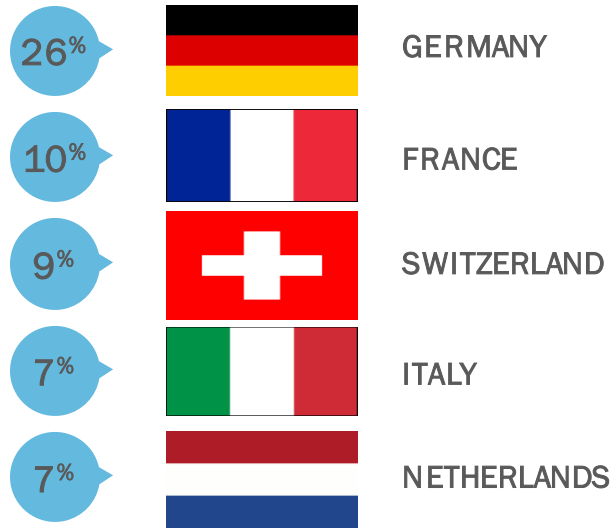
GENDER**



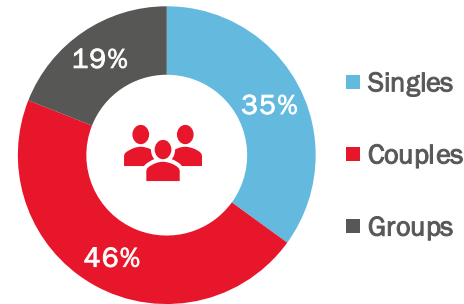
In 2022, Fiji received 10,817 visitors from Continental Europe, which accounted for less than 2% of all visitors. From April to December, 10,274 visitors arrived. Visitors from this market spent less time in Fiji in 2022 (12.5 nights compared to 14.3 nights), but spent more (627 FJD per night vs 412 FJD per night; 7,860 FJD per trip vs 5,893 FJD per trip). Visitor satisfaction in 2022 was 92%, compared to 89% in 2019.

*By visitors who arrived from April to December 2022
 **Characteristics of survey respondents only; no party heads younger than 20 years old

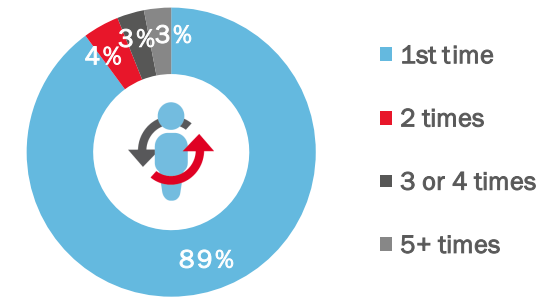
TOP 5 EUROPEAN COUNTRIES



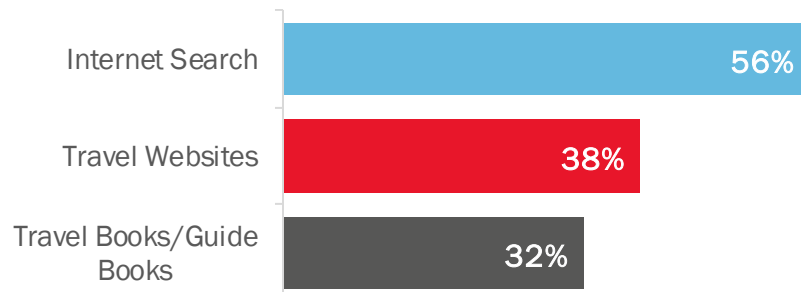
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



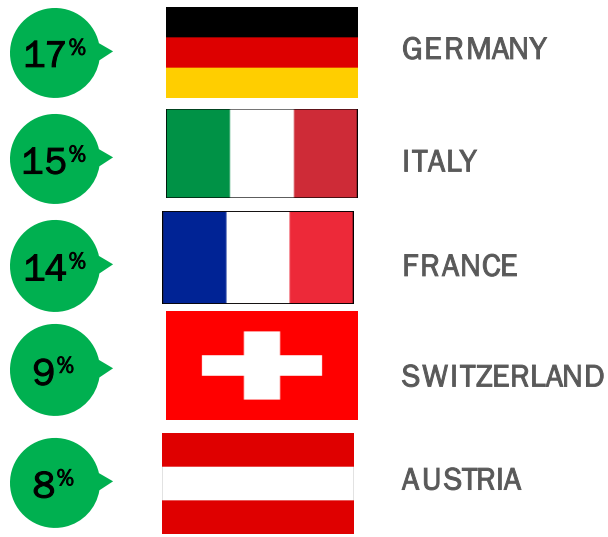
TOP INFLUENCING FACTORS FOR VISITING*



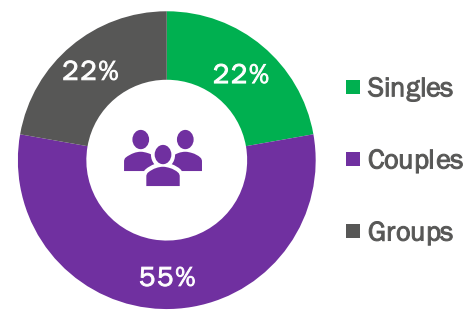
The predominate country from Continental Europe was Germany. Many Continental Europeans came as couples but also solo travellers. Almost all were first-timers to Fiji. Internet searches and to a lesser extent travel websites and guidebooks provided planning information for this trip. Fiji appealed to those looking for a new adventure. Spectacular landscape was also a drawcard, while others stated Fiji was always some place they wanted to visit.

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

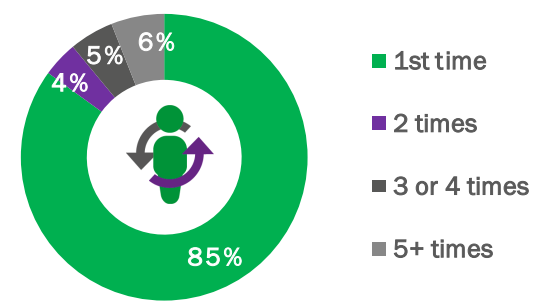
TOP 5 EUROPEAN COUNTRIES



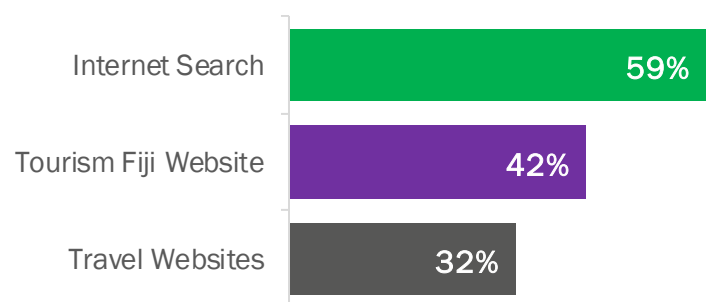
PARTY SIZE



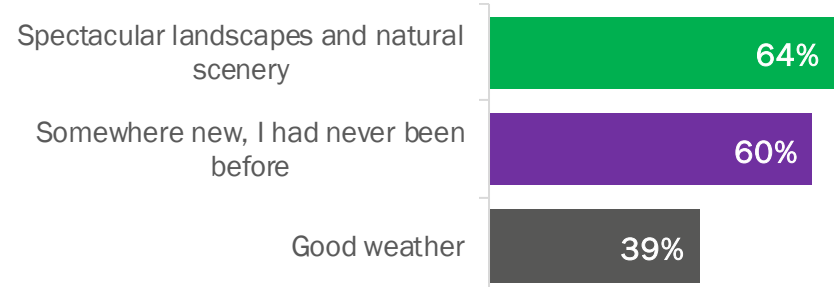
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

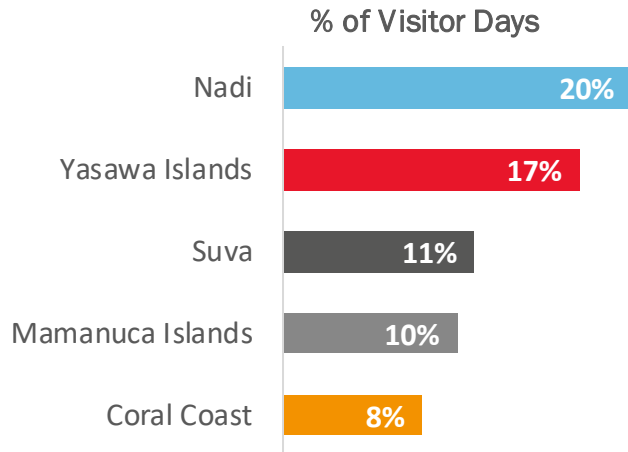


As was the case in 2019, the predominant country from Continental Europe in 2022 was Germany. In 2022, fewer visitors came as singles (35% down to 22%), but more came as couples (46% to 55%). Almost 90% of visitors indicated they were first-time visitors, and visitors relied heavily on the Internet and travel websites to plan their trips. Consistent with visitors from 2019, the top factors for visiting Fiji was the fact that it was someplace new and its natural beauty.

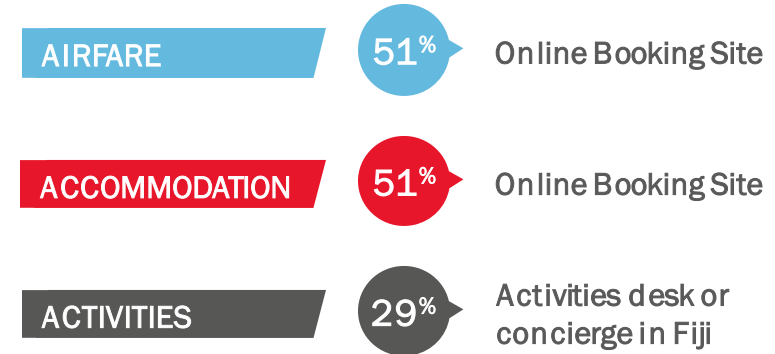
*Multiple responses, therefore, totals do not add up to 100%.



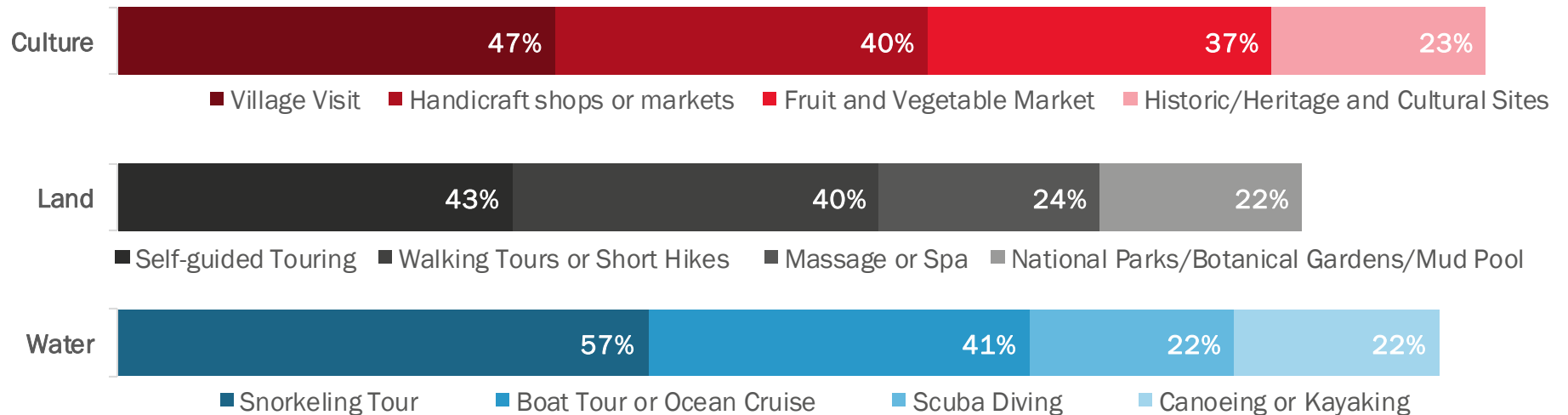
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

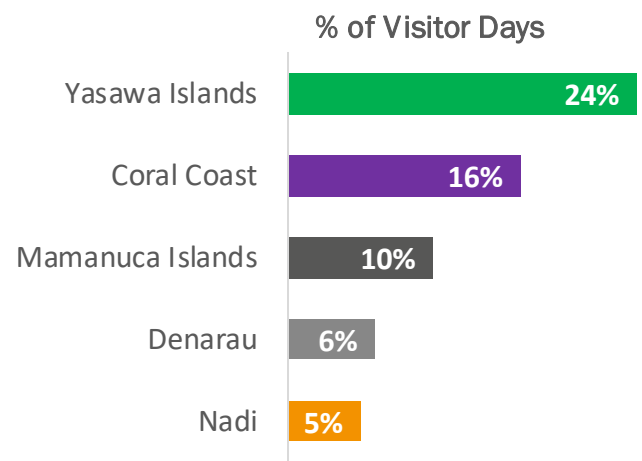


Europeans were found mainly in Nadi and the Yasawa Islands with smaller amounts also in Suva, the Mamanuca Islands and the Coral Coast. Much of the booking for travel was done via an online booking site. For those who went on additional activities, these were booked at the activities desk in Fiji. Snorkelling was a common activity for many Europeans, as was participating in village visits.

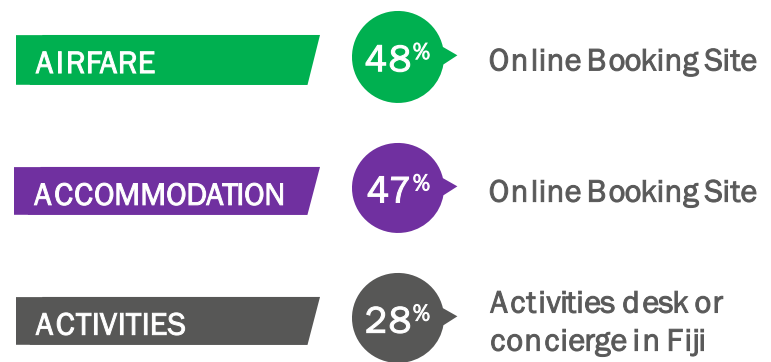
*Multiple responses, therefore, totals do not add up to 100%.



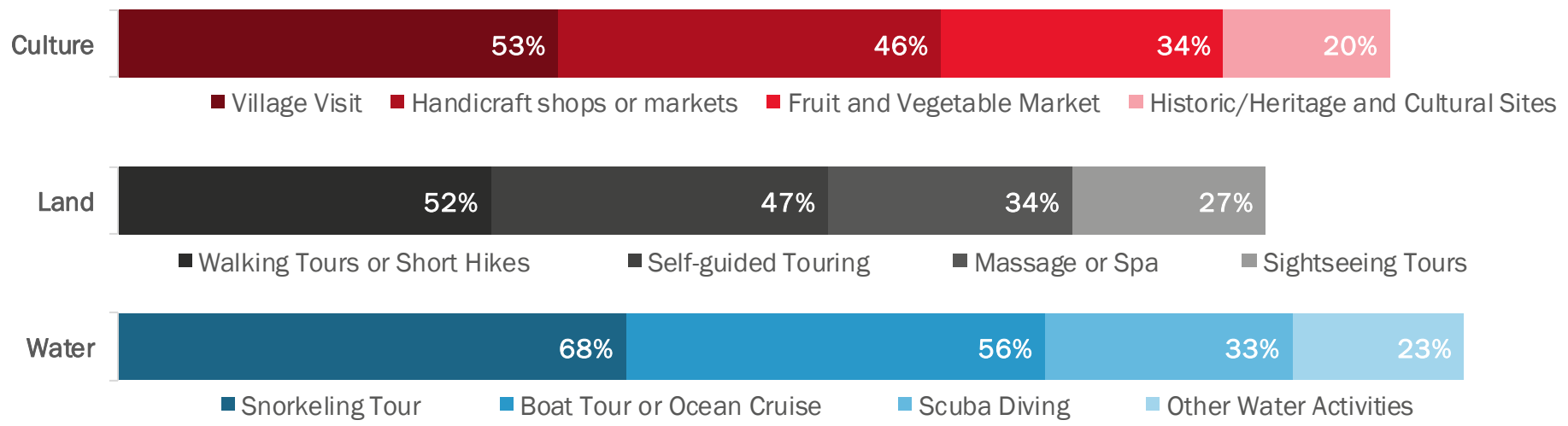
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

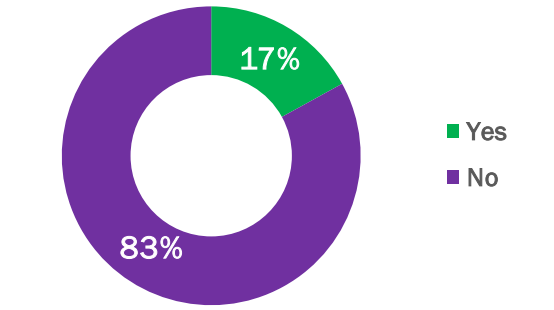
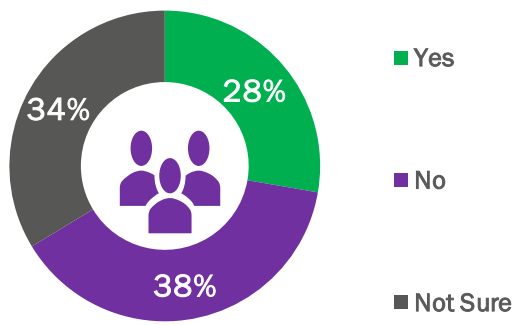


In 2019, Europeans preferred Nadi (20% visited) to other regions; in 2022, Europeans preferred the Yasawa Islands (24% visited). Methods for booking travel remain unchanged as Europeans booked travel principally using online booking sites. Europeans were also heavily active, and it appears a greater proportion participated in activities in 2022 compared to 2019. This was especially true of walking tours and snorkelling tours.

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

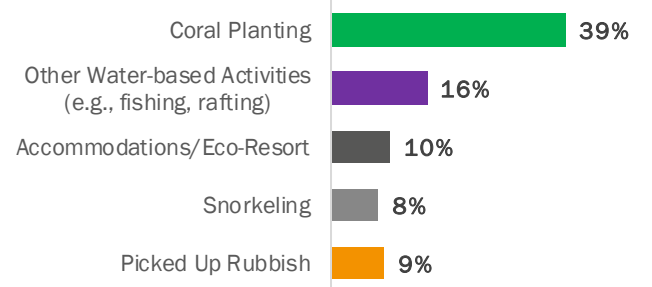
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

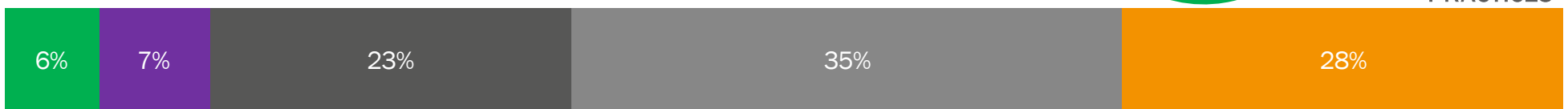


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

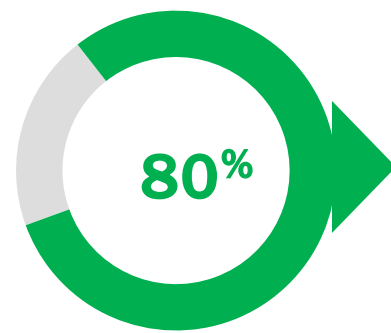
TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)



■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

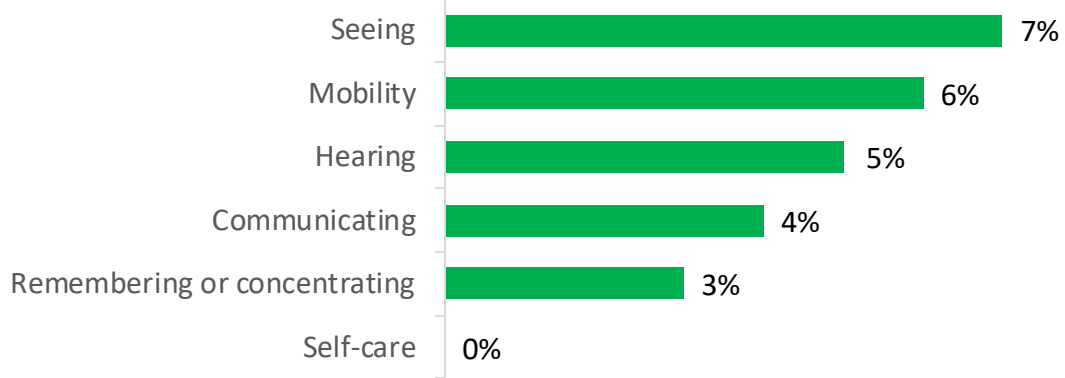


Europeans displayed some awareness of sustainability campaigns (28%) and participation in activities promoted as sustainable (17%). Visitors from this market mentioned activities such as planting coral, water-based activities (like fishing and river rafting), staying at a sustainable resort, snorkelling, and picking up rubbish around them. Eighty percent expressed satisfaction with Fiji's sustainable practices. Europeans also demonstrated joy with their trips. Approximately 13% said their trip was less enjoyable than expected, 23% stated it was about what was expected, and 63% found it more enjoyable than expected.

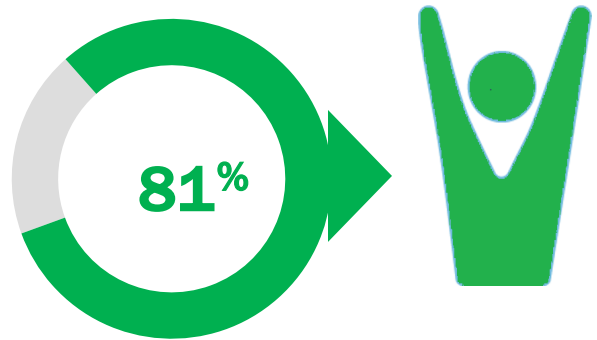
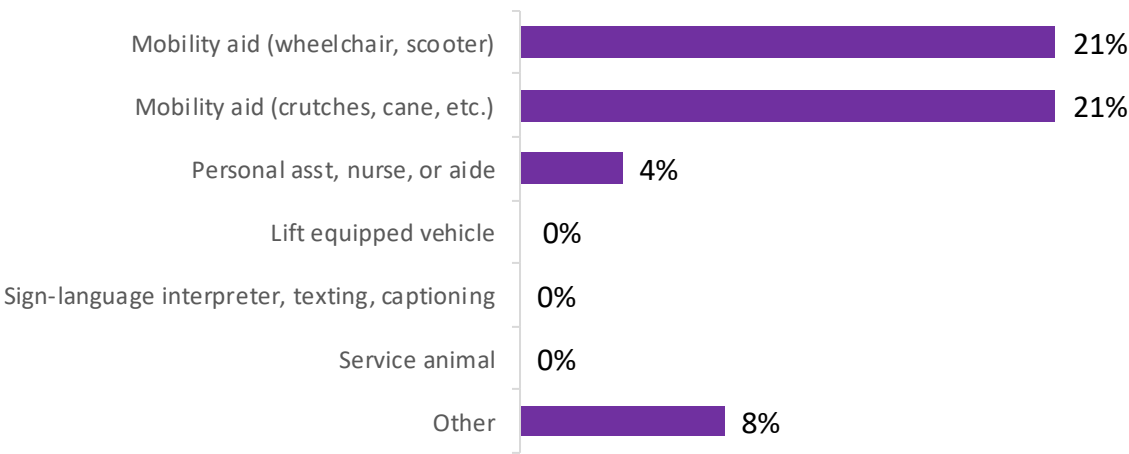
Save for need

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

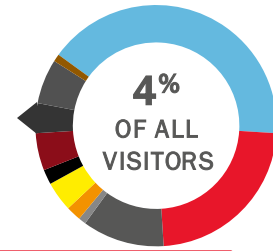


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

European parties indicated fewer members who had difficulties, but included a sizeable percentage of parties who used both electric and non-electric mobility aids. Among those who could answer, 81% of Europeans indicated they were satisfied with Fiji's accessibility for disabled persons.

2019

OTHERASIA*



*Including, Korea, India, and other Asian countries. Does not include Hong Kong.

34,569

TOTAL VISITORS

FJD 108M

TOTAL SPEND

FJD 74M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



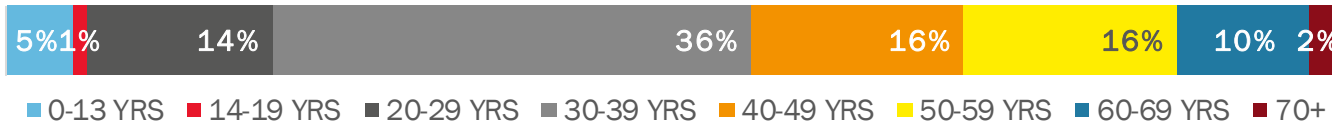
SPEND



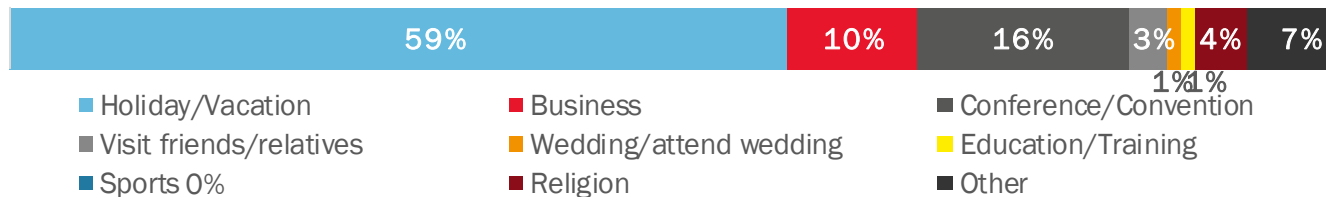
SATISFACTION



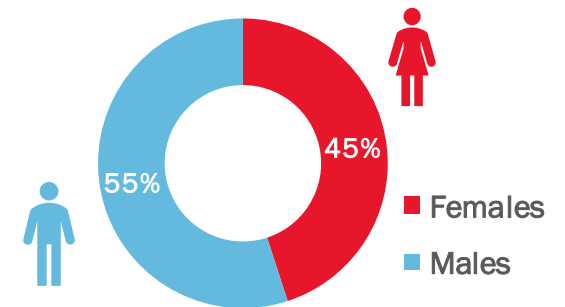
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



The other countries of Asia grew +1.6% and accounted for another 4% of total visitors. Much of that growth came from India (+5.6%) which compensated for the loss in South Korea visitors (-16.8%). Visitors were more likely to be men in their 30's. They stayed for a short period of 7.6 nights.

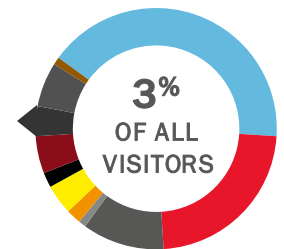
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

2022 APR-DEC VISITORS

ALL ASIA*

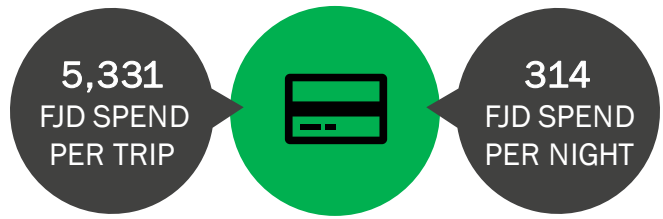
*Includes Japan and China



AVERAGE LENGTH OF STAY



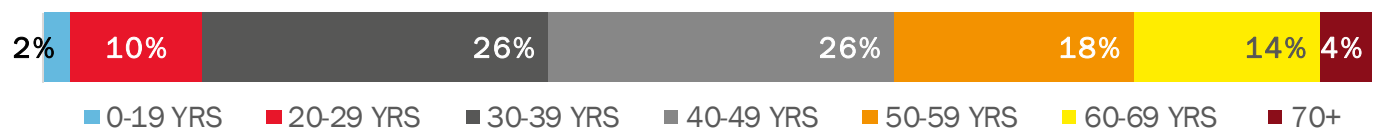
SPEND



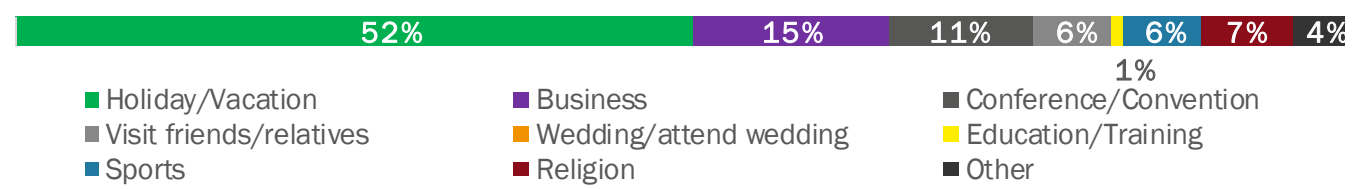
SATISFACTION



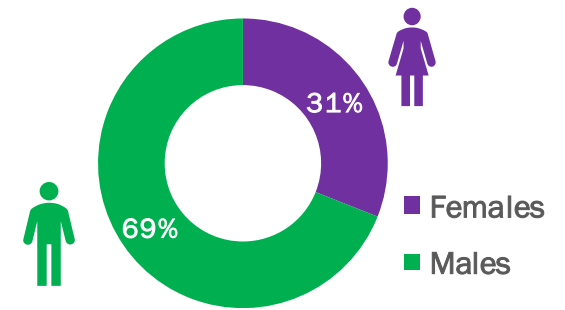
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



GENDER**



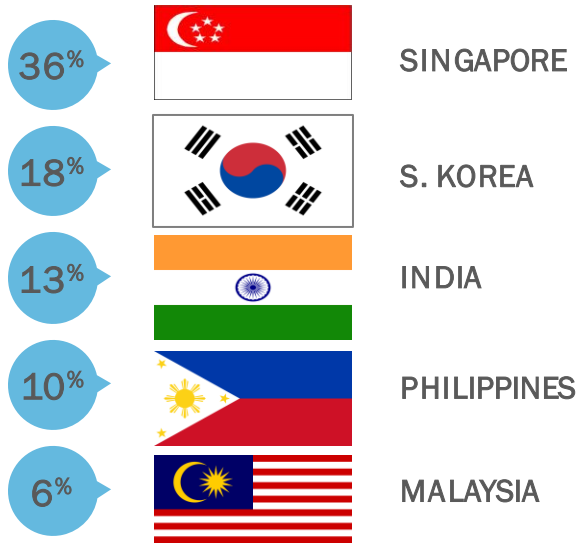
The "All Asia" market includes residents from Japan, South Korea, China, India, Hong Kong, and countries comprising the rest of Asia. In 2022, 18,236 visitors from these nations arrived in Fiji. From April through December 2022, 16,688 visitors from these countries arrived. The average length of stay for these visitors, 17 nights, was longer than any other market. Visitors from these countries spent an average of 314 FJD per night and 5,331 per trip. The "All Asia" market included a great variety of purposes for visits: Just over half came on holiday/vacation, but 15% came for business, 11% came for conferences/conventions, 7% came for religious purposes, 6% came for sports, and another 6% came to visit friends and family. Approximately 86% of visitors indicated they were satisfied with this visit to Fiji.

*By visitors who arrived from April to December 2022
 **Characteristics of survey respondents only

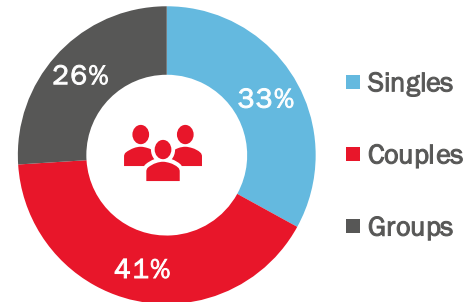
Note: Sample size is relatively small and data not comparable to 2019.

*Including, Korea, India, and other Asian countries

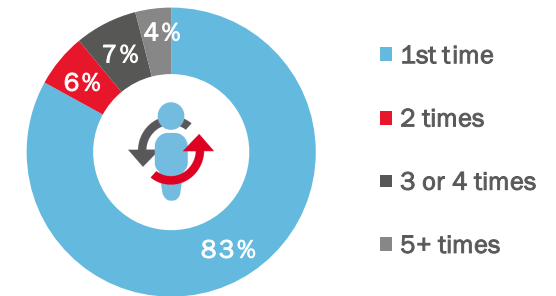
TOP 5 ASIAN COUNTRIES



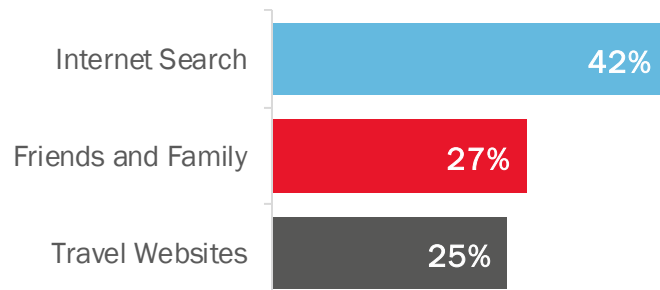
PARTY SIZE



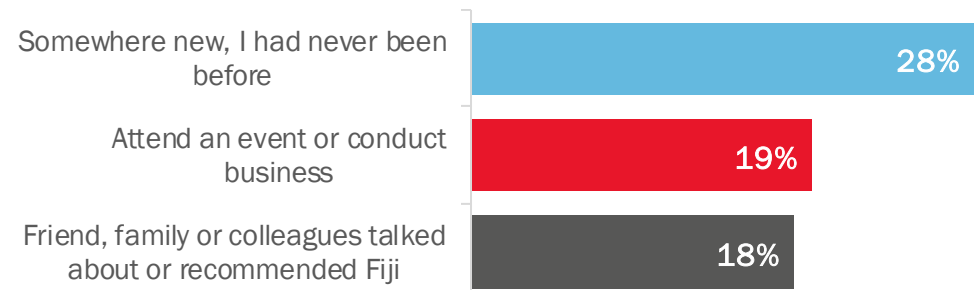
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



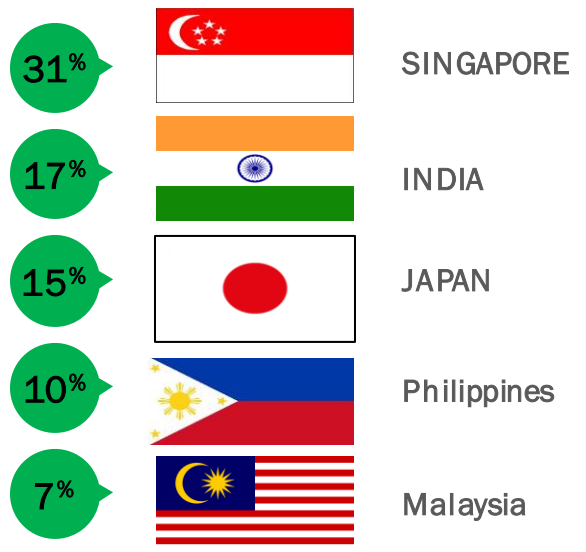
Over one-third of the visitors were from Singapore. Many came as couples, but there were also solo travellers and some groups. Most were on their first trip to Fiji. Internet search was the main information source for planning. A noticeable portion were influenced to come to Fiji because of an event or to conduct business.

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

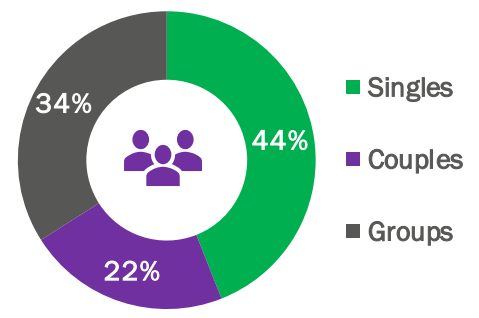
Note: Sample size is relatively small.

*Includes Japan and China

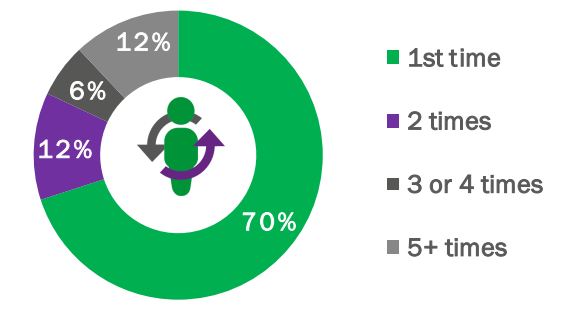
TOP 5 ASIAN COUNTRIES (Unweighted Distribution)



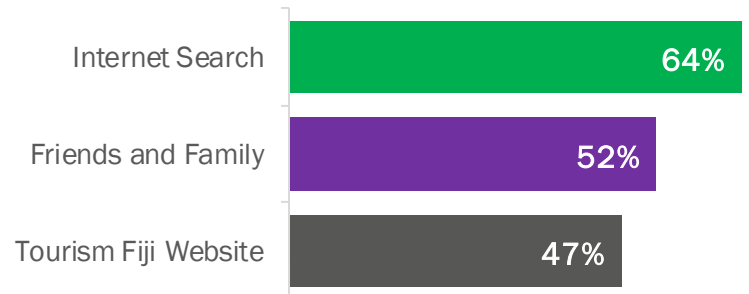
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



Residents of Singapore and India comprised the bulk of IVS respondents from the “All Asia” market. Visitors included a larger proportion of single visitors compared to other markets and party heads who are men. These visitors relied on the Internet and friends and family as their main sources for planning their trips, and indicated the top factors for visiting Fiji were that it was somewhere new and Fiji’s natural beauty.

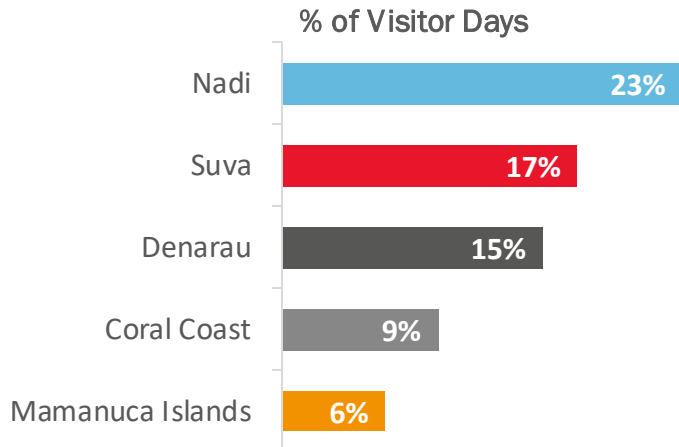
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small and data not comparable to 2019.

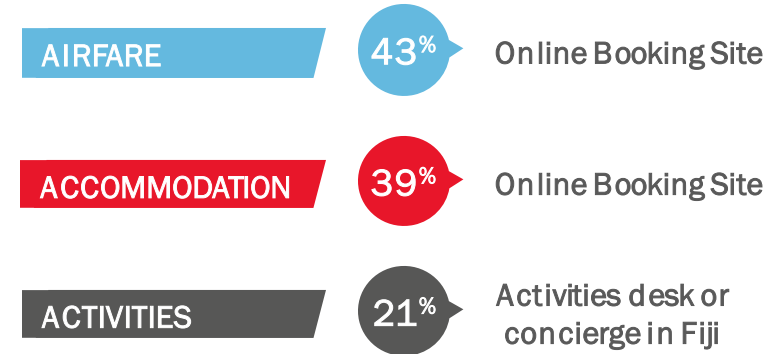
*Including, Korea, India, and other Asian countries



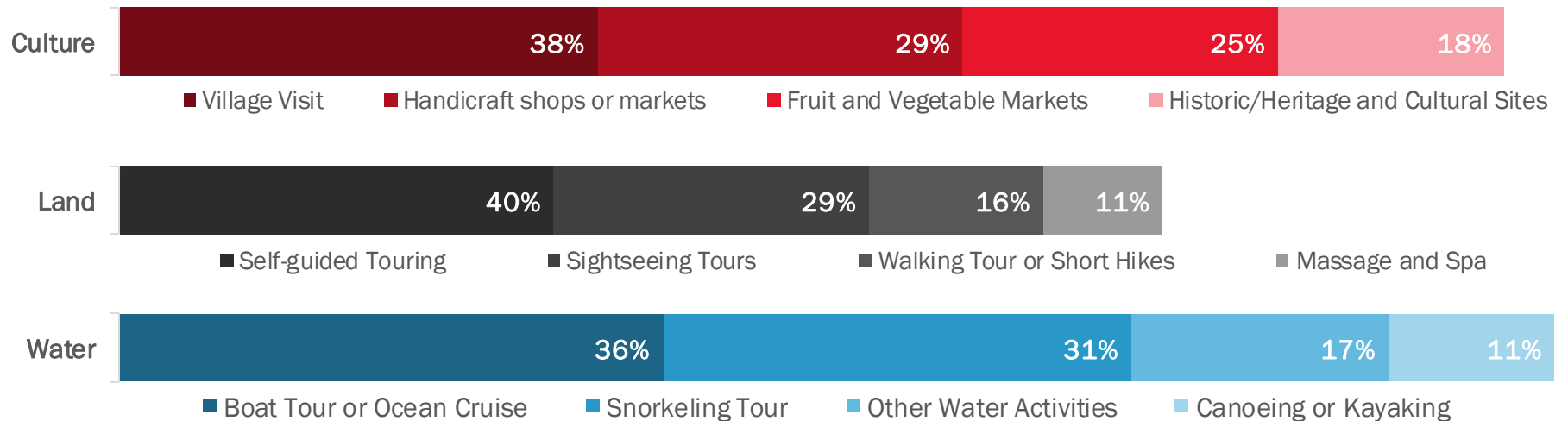
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



Many visited Nadi as well as Suva and Denarau. Arrangements for airfare and accommodations were done through online booking sites. Since many were traveling on business, participation in tourist activities was lower.

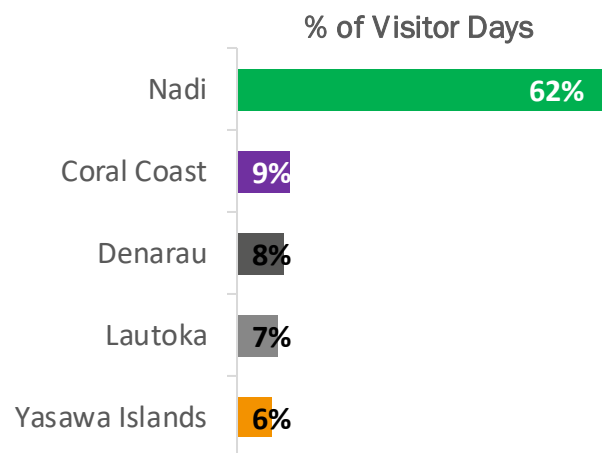
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

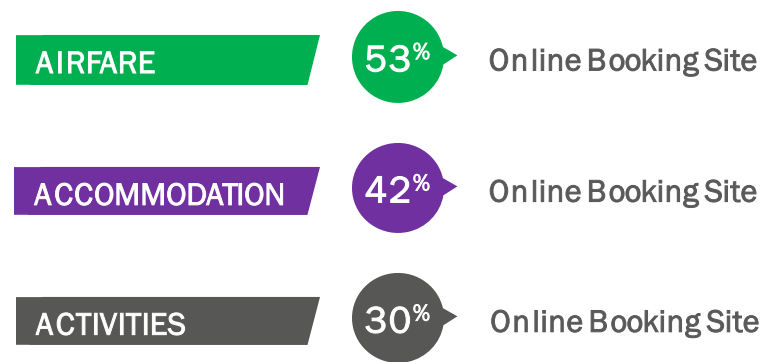
*Includes Japan and China



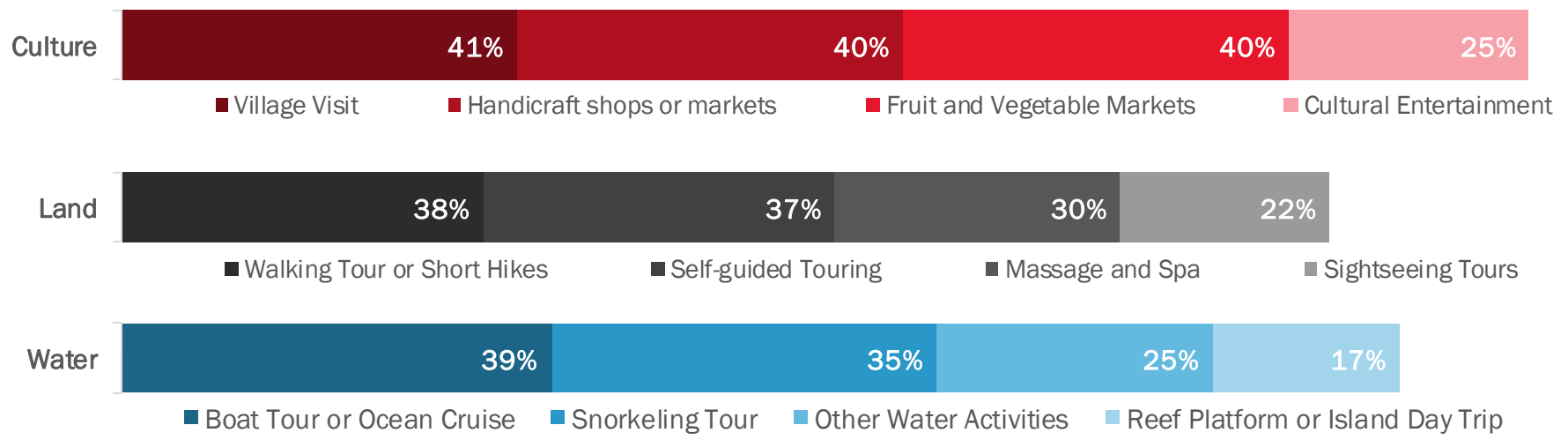
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



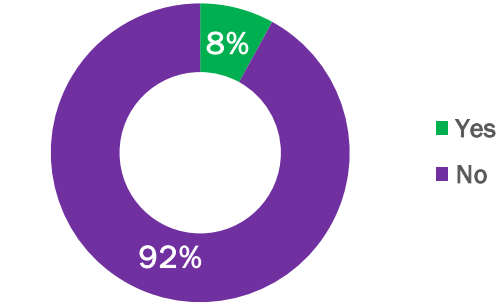
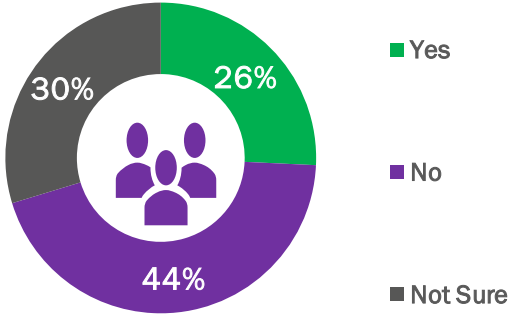
Visitors from the “All Asia” market tended to remain in Nadi rather than venture to other regions. They also relied heavily on online booking websites to book airfare, accommodations, and activities. They were somewhat less active than other markets, but appear to enjoy shopping, village visits, and boat tours.

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

Note: Sample size is relatively small and data not comparable to 2019.

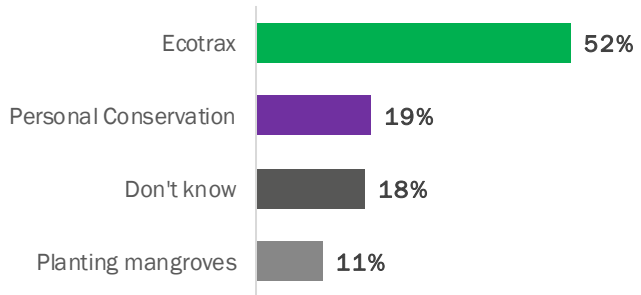
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS

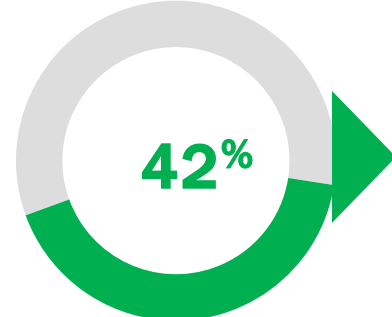


PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

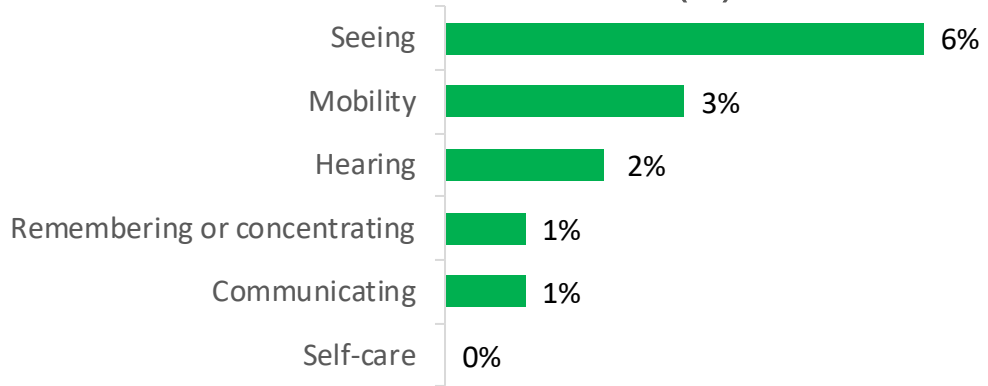


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

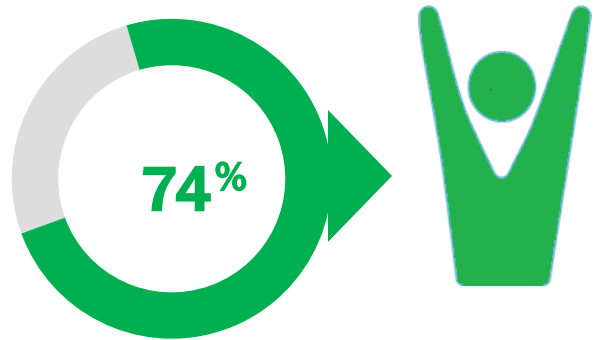
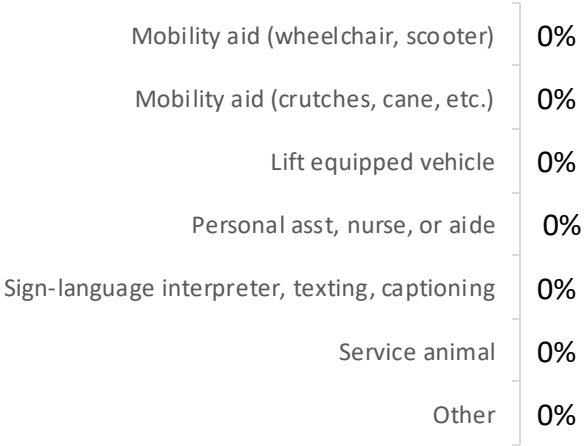
About one-quarter of visitors from this market indicated they were aware of sustainability campaigns, but just 8% indicated they participated in an activity promoted as sustainable. Of those who could identify an activity, use of Ecotrax was the main activity, followed by personal conservation, and planting mangroves. Just 2 out of 5 visitors from this market indicated they were satisfied with Fiji’s sustainable practices. In terms of trip expectations, visitors from this market expressed content. About 10% indicated the trip was less enjoyable than expected, 29% thought it was about what was expected, and 57% found it more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

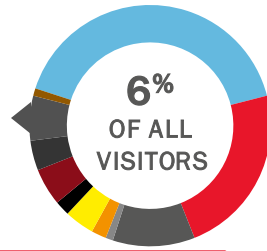


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

Visitors from this market indicated few members of their travel parties had physical difficulties. They indicated that no one in their parties required assistance for these difficulties. Among those who could answer, 74% indicated they were satisfied with accessibility for disabled persons in Fiji.

2019

PACIFIC ISLANDS



54,369

TOTAL VISITORS

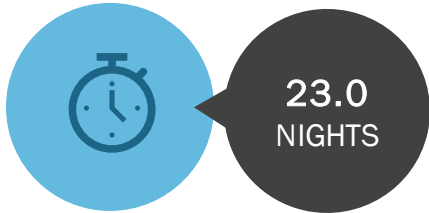
FJD 388M

TOTAL SPEND

FJD 269M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



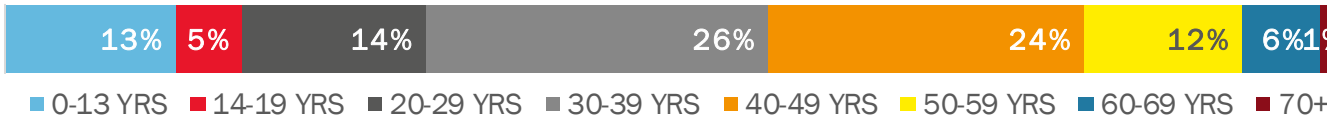
SPEND



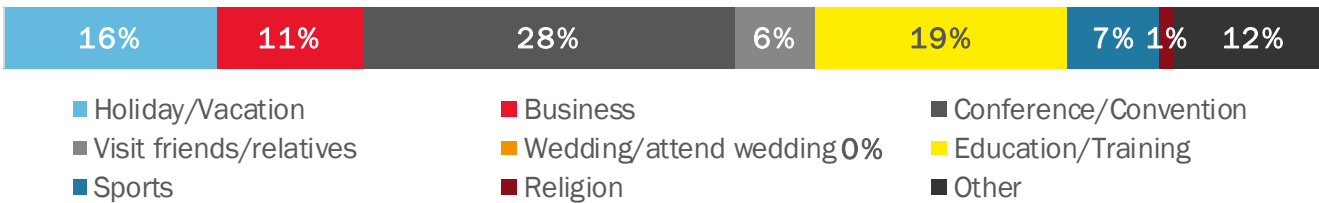
SATISFACTION



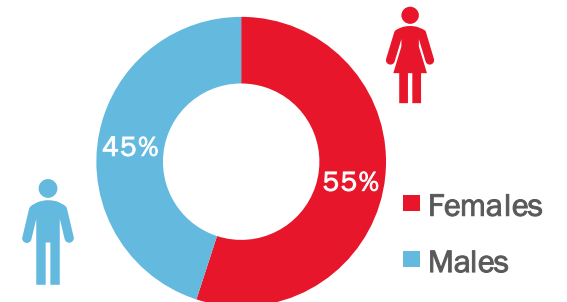
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



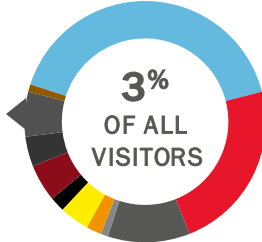
Visitors from the Pacific Islands accounted for 6% of total visitors and showed strong growth of +5.3% over last year. Islanders stayed much longer than the typical visitor (23 nights) which resulted in a high per trip spending

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

2022 APR-DEC VISITORS

PACIFIC ISLANDS



21,564
TOTAL VISITORS

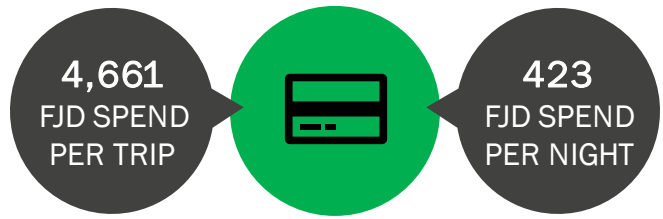
FJD 93M
TOTAL SPEND*

FJD 42M
PRE-PAID SPEND*

AVERAGE LENGTH OF STAY



SPEND



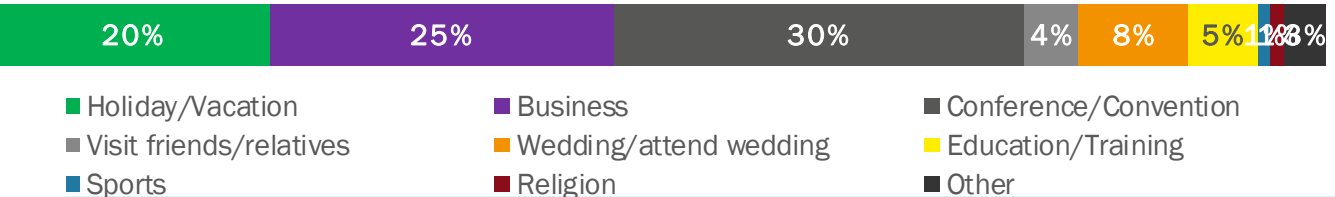
SATISFACTION



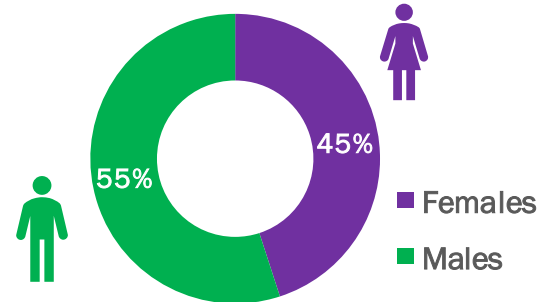
AGE OF PARTY HEAD**



PURPOSE OF VISIT (%)



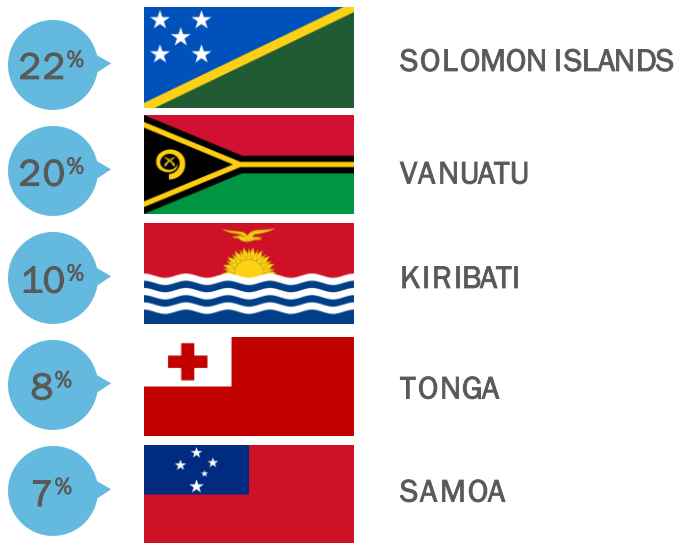
GENDER**



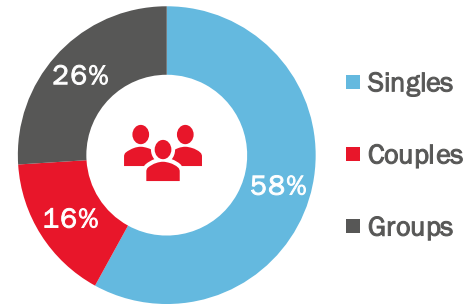
In 2022, there were 21,564 visitors from countries that comprise the Pacific Island market, or about 3% of all visitors to Fiji. 20,019 of these visitors arrived between April and December. Islanders reported staying an average of 11 nights, which was down considerably from 23 nights in 2019. Per night spending was up (423 FJD in 2022 compared to 311 FJD in 2019), but because of the shortened stay, per trip spending was down (4,661 FJD in 2022 compared to 7,145 FJD in 2019). Islanders reported the most variety in reasons for visiting, with the largest proportion visiting for conferences (which was also the case in 2019). Of all the major market areas, satisfaction was the lowest, at 76%.

*By visitors who arrived from April to December 2022
 **Characteristics of survey respondents only; no party heads younger than 20 years old
 Note: Sample size is relatively small.

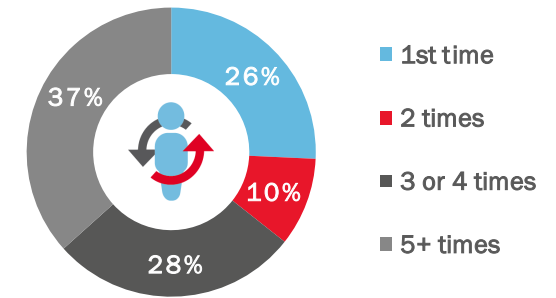
TOP 5 PACIFIC ISLAND COUNTRIES



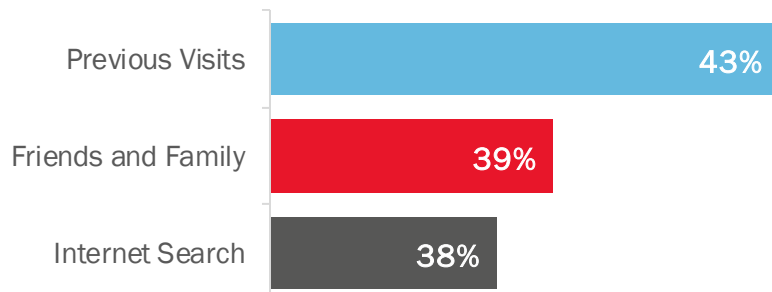
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



The Pacific Island visitors were represented by large numbers from Solomon Islands and Vanuatu. Most were repeat visitors with over a third having been to Fiji five or more times. Pacific Islanders typically travelled alone and relied on their knowledge from previous trips to Fiji or recommendations from friends and family. Much of the reason for visiting was to attend an event or conduct business.

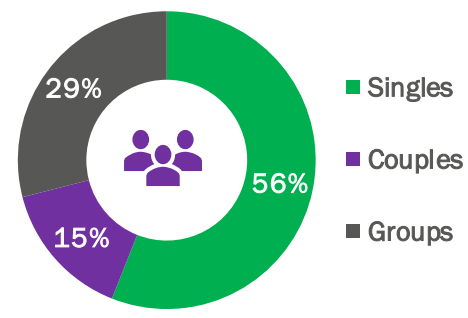
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

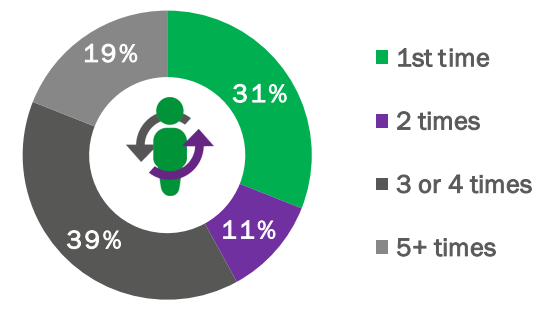
TOP 5 PACIFIC ISLAND COUNTRIES



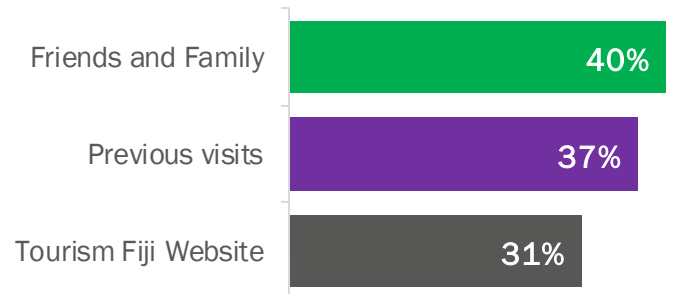
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



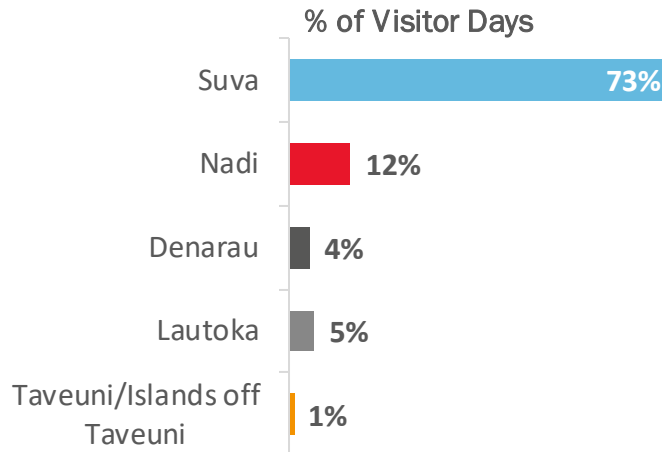
As was the case in 2019, the majority of residents from this market are came as single travellers and had visited Fiji multiple times before. Visitors from these countries indicated they relied on friends and family and previous visits to plan their trip, and pointed to the friendliness of the local Fijian people and the cost-value aspect of a trip to Fiji as the top influencing factors for visiting.

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

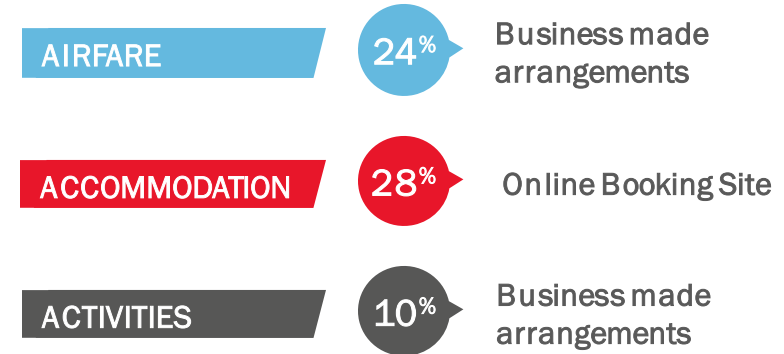
Note: Sample size is relatively small.



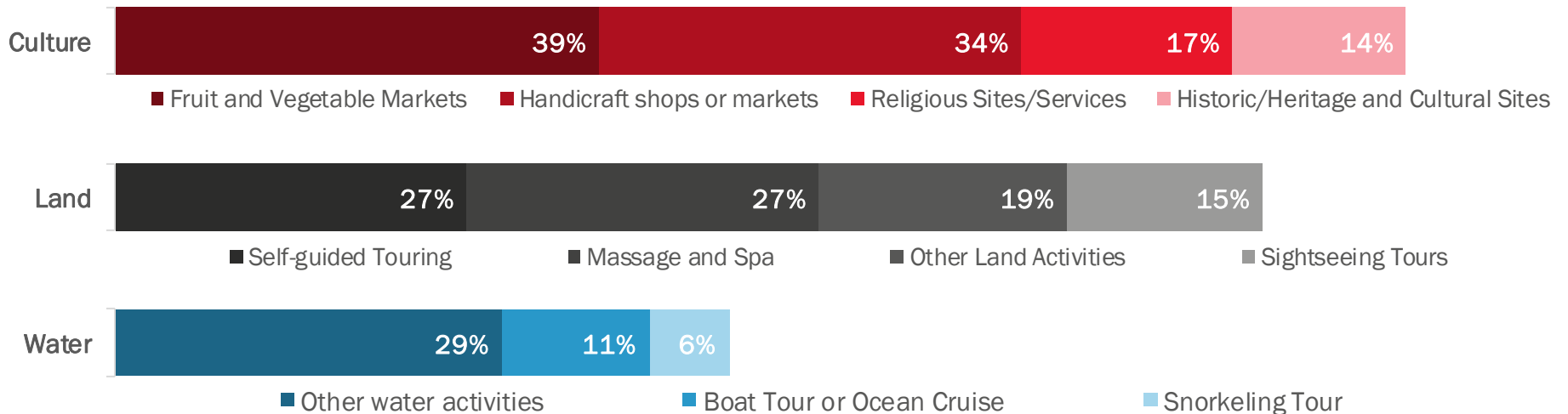
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



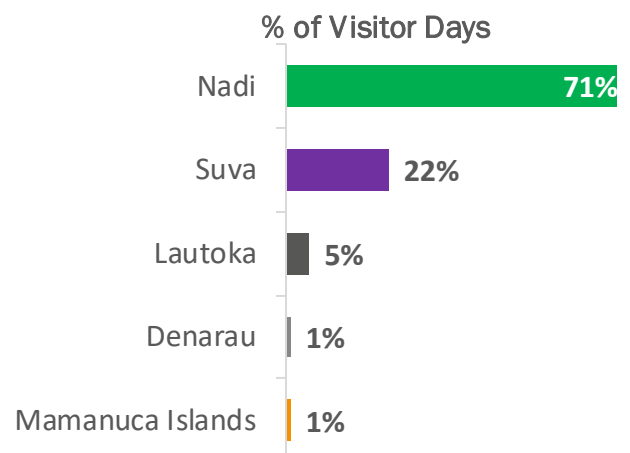
Given that many were traveling for business, most of the Pacific Islanders focused their time in Suva. Business travel was also reflected in the booking methods with visitors' companies making the airfare and activities reservations.

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

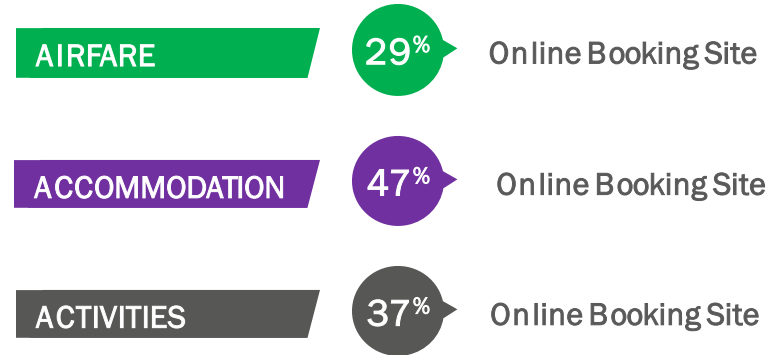
Note: Sample size is relatively small.



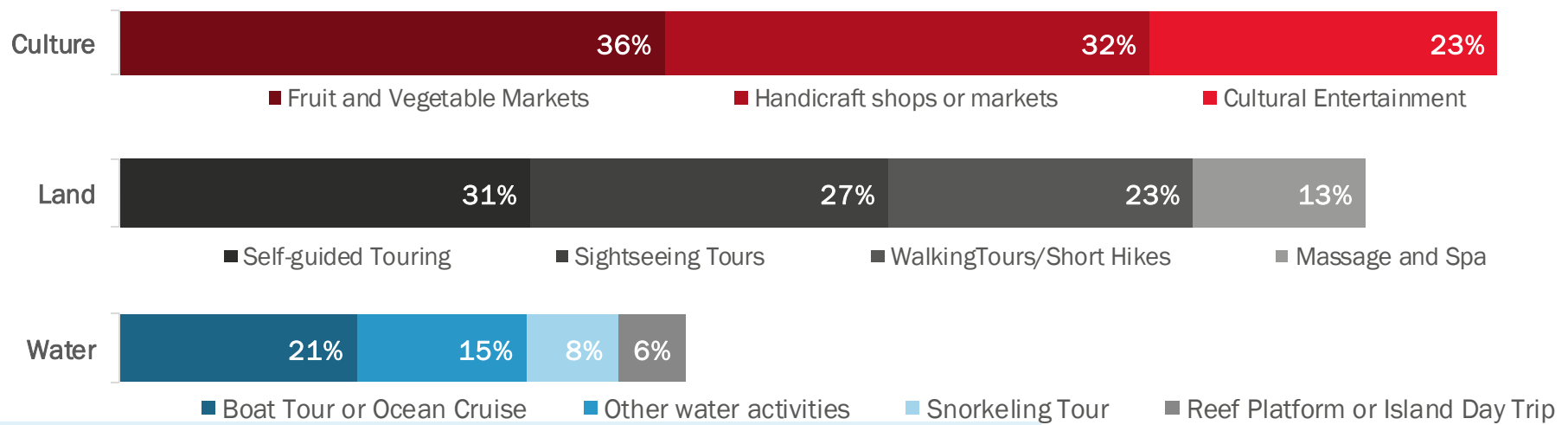
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



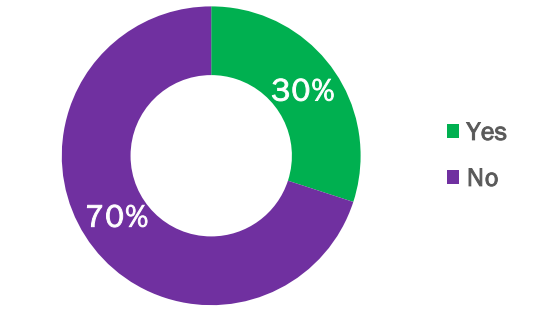
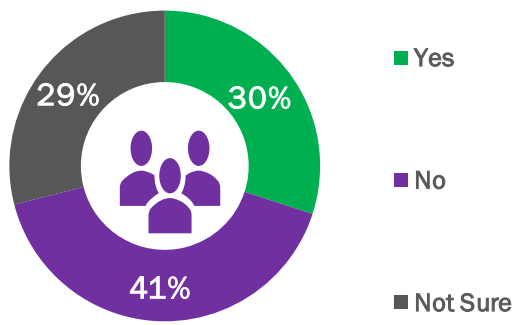
Visitors in 2022 showed both similarities and differences with visitors from 2019 in terms of travel behavior. With regard to activities, Islanders continued to exhibit an appreciation for markets and self-guided tours, and to a lesser extent, water activities and boat tours. On the other hand, Islanders spent most of their time in Nadi (71%) in 2022 and not Suva, where 73% spent their time in 2019. While a quarter of Islanders came on business, the remaining came for conferences, holiday, weddings, friends and family, and other purposes that were less likely to occur in Suva. Additionally, Islanders indicated business made their airfare and activities arrangements in 2019, but in 2022, Islanders relied more on online booking sites for airfare, accommodations, and activities

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

Note: Sample size is relatively small.

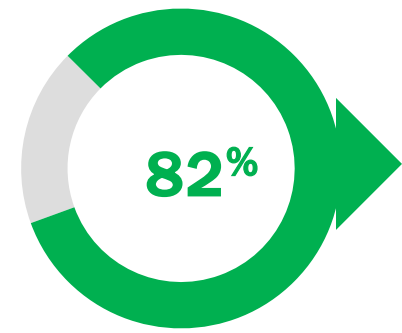
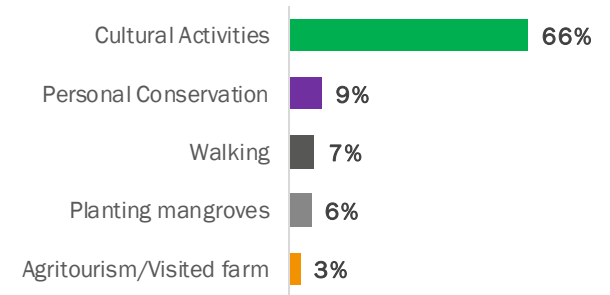
SUSTAINABILITY

AWARENESS OF SUSTAINABILITY CAMPAIGNS



PARTICIPATION IN ACTIVITIES PROMOTED AS SUSTAINABLE/ALLOW YOU TO OFFSET CARBON FOOTPRINT

TOP SUSTAINABLE ACTIVITIES



TRIP EXPECTATION COMPARISONS(%)

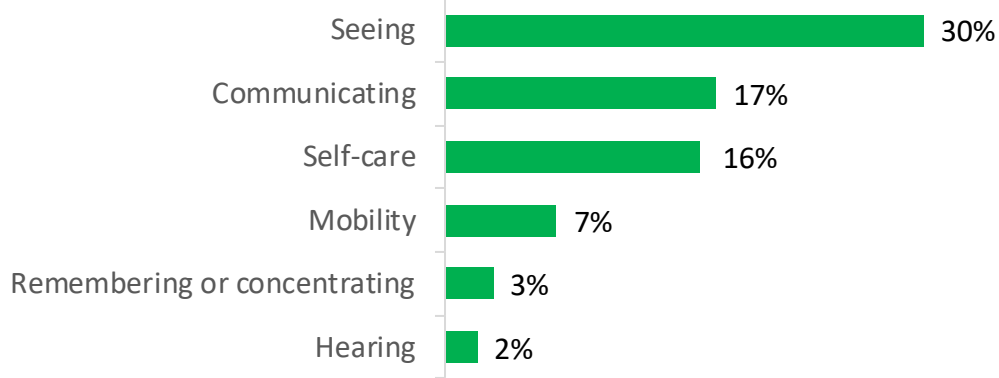


■ Much less enjoyable ■ Less enjoyable ■ About what was expected ■ More enjoyable ■ Much more enjoyable

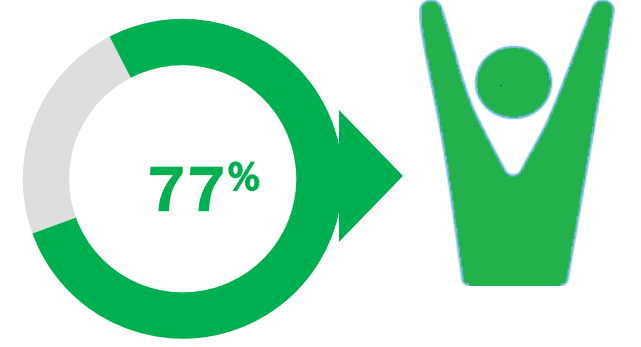
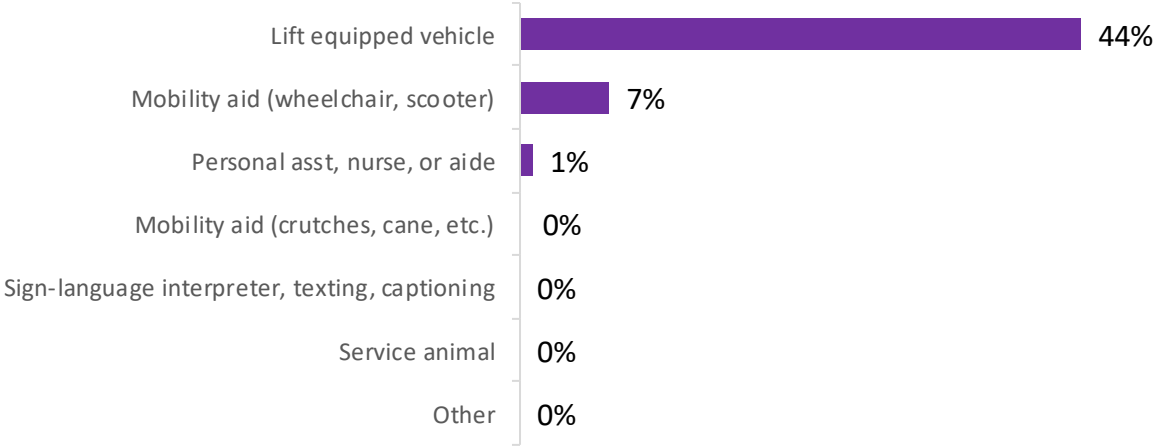
Like other market areas, Islanders revealed little awareness of sustainability campaigns. Unlike other market areas, Islanders included the largest proportion of all visitors who reported participation in activities promoted as sustainable. Interestingly, Islanders overwhelmingly cited cultural activities as sustainable, followed by personal conservation, walking, planting mangroves, and agritourism. Over 80% of Islanders indicated they were satisfied with Fiji’s sustainable practices. Additionally, Islander indicated they were also content with their trips. Approximately 6% indicated the trip was less enjoyable than expected, 31% found the trip was about what they expected, and 60% revealed the trip was more enjoyable than expected.

INCLUSION

TRAVEL PARTY DIFFICULTIES (%)



ASSISTANCE USED BY TRAVEL PARTY

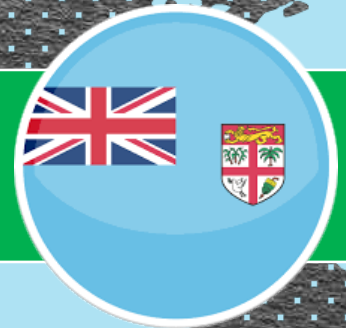


SATISFACTION WITH ACCESSIBILITY FOR DISABLED PERSONS

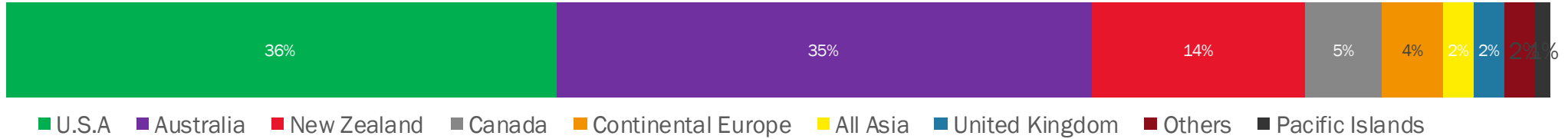
Islanders revealed the greatest proportion of travel parties beset by physical difficulties, and the greatest proportion that used assistance—lift-equipped vehicles, in particular— while in Fiji. Among those who could respond, 77% indicated satisfaction with Fiji’s accessibility for disabled persons.

SUB-REGIONAL ANALYSIS

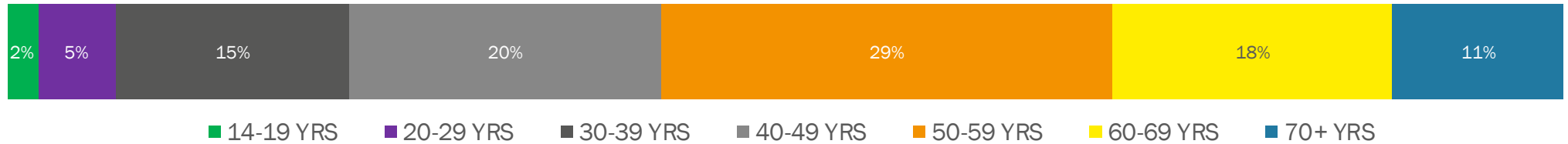
VANUA LEVU & TAVEUNI



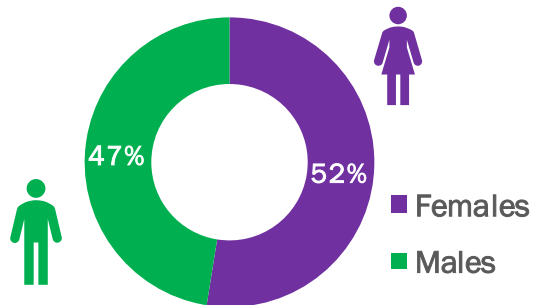
TOTAL 2022 VISITORS (%) BY SOURCE MARKET*



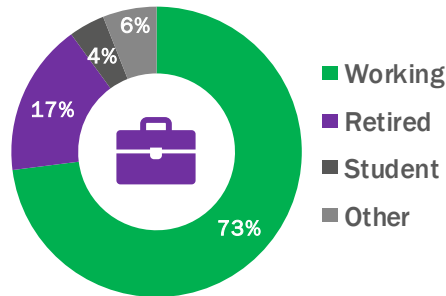
AGE OF PARTY HEAD (%)**



GENDER**



EMPLOYMENT STATUS**

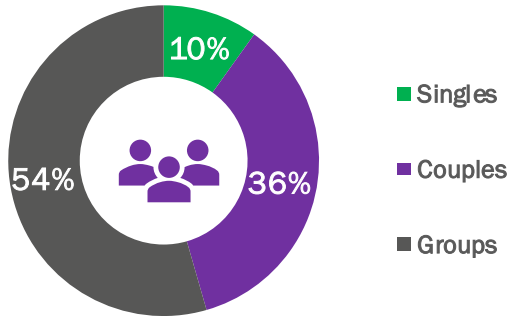


In 2022, visitors to Vanua Levu (Savusavu, Islands off Savusavu, and Labasa) came primarily from the U.S. and Australia, and to a lesser extent New Zealand. Party heads of those visited the region were generally over the age of 50, female, and working.

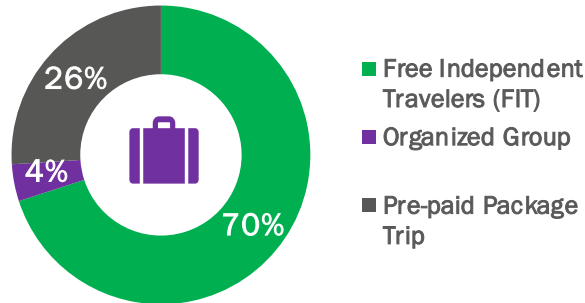
*Based on weighted survey data

**Characteristics of survey respondents only

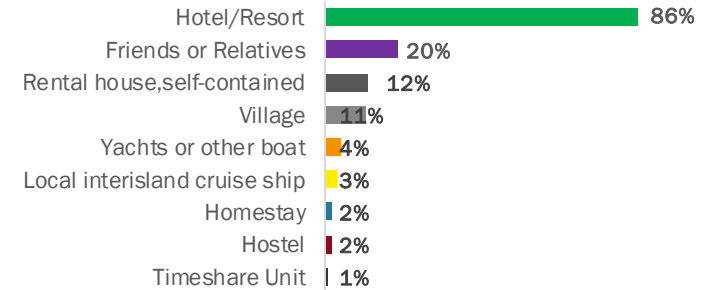
PARTY SIZE



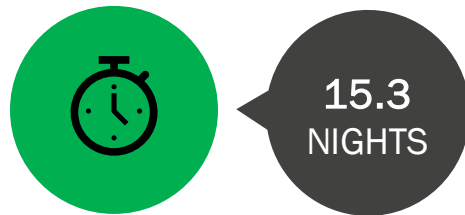
TYPE OF TRAVELERS*



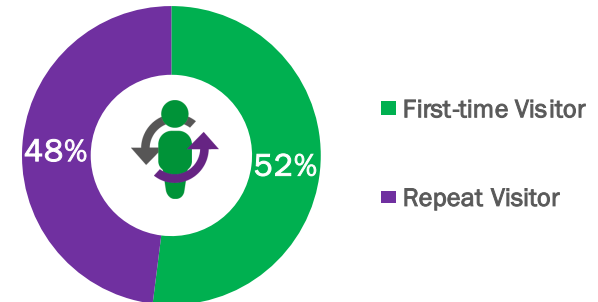
ACCOMMODATION



AVERAGE LENGTH OF STAY



NEW OR RETURNING



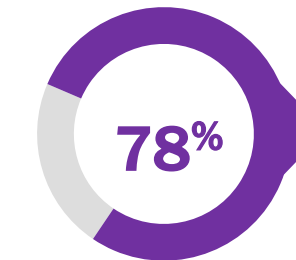
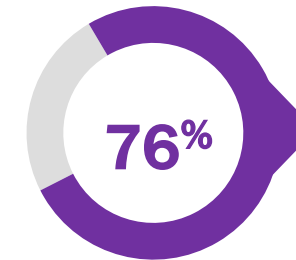
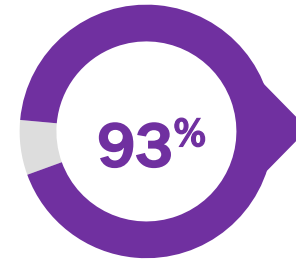
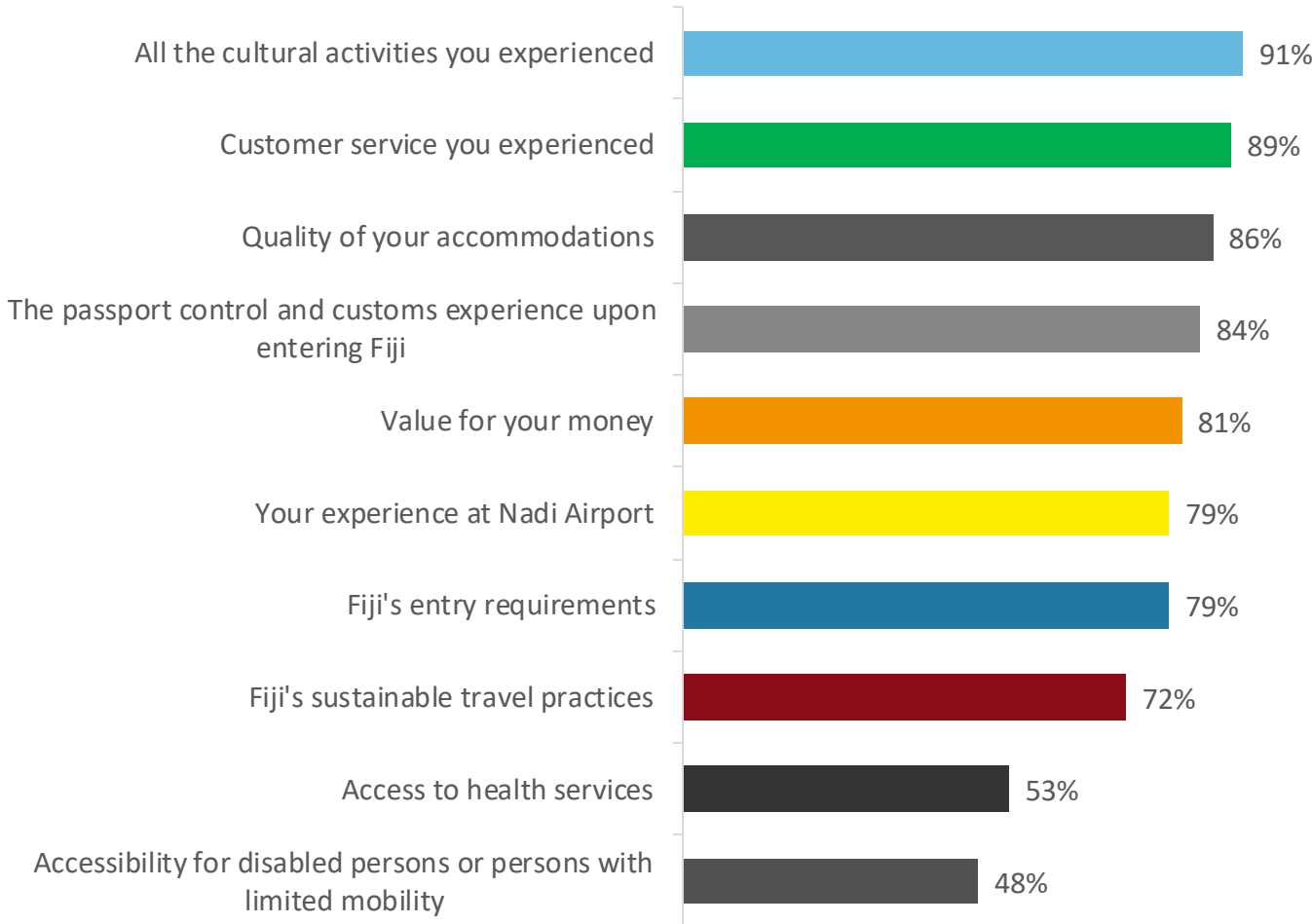
PURPOSE OF VISIT (%)



*: Organized group consists of respondents who travelled with a tour or school group, regardless of if they paid for a package trip.

Those who visited Vanua Levu came to Fiji mostly as groups or couples, and primarily as free, independent travelers. A little over half were first-time visitors to Fiji. Vanua Levu visitors spent about 15 nights in Fiji and stayed primarily at a hotel/resort. Almost three-quarters of those who visited the region came to Fiji on holiday/vacation, though 11% noted their purpose was to visit friend and family.

SATISFACTION WITH FIJI EXPERIENCE



LIKELY TO VISIT FIJI IN THE NEXT 5 YEARS

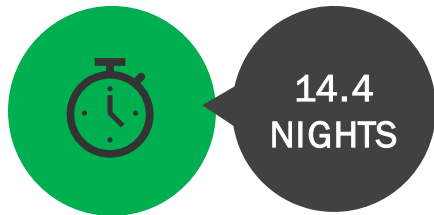
Among those who visited Vanua Levu, overall satisfaction for the Fiji visit was 93%. Visitors to the region noted a significant level of satisfaction with the cultural activities they experienced in Fiji, the customer service they experienced in Fiji, and the the quality of accommodations in Fiji, among other factors.

Satisfaction and recommendations: the percent of visitors who rated a 7 to 10 on a scale where 1=Not at all satisfied/likely and 10=Extremely satisfied/likely

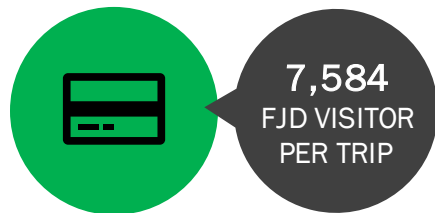
SCUBA

7,217

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



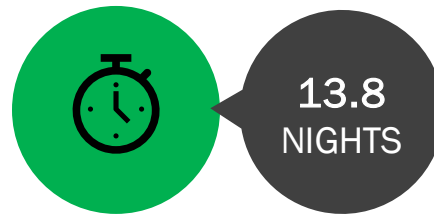
SPEND

527 FJD Per Night

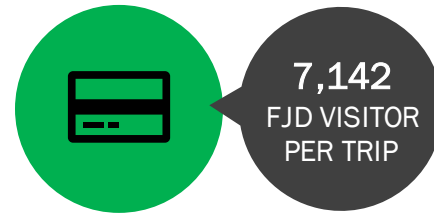
ADVENTURE

15,812

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



SPEND

518 FJD Per Night

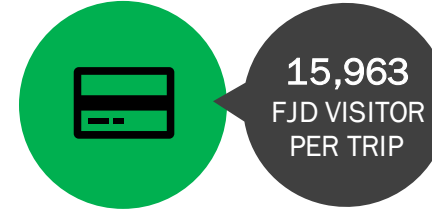
YACHTING

1,173

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



SPEND

713 FJD Per Night

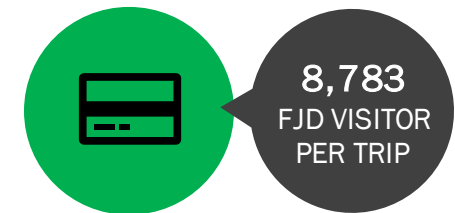
HONEYMOON/MARRIAGE

2,763

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



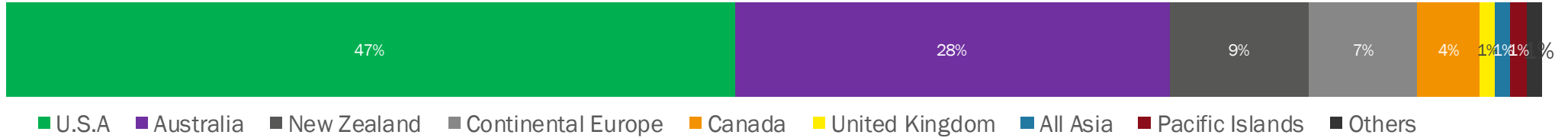
SPEND

665 FJD Per Night

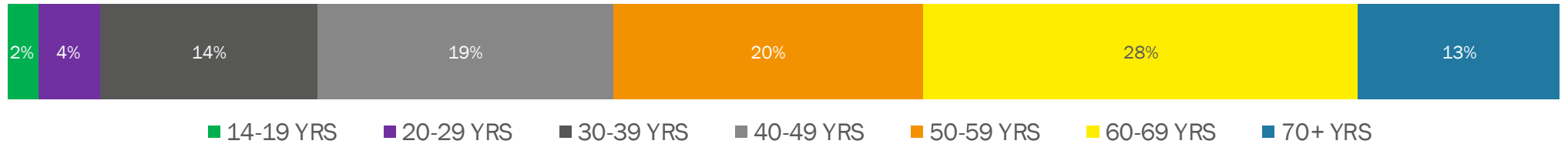
Vanua Levu visitors participated in a number of activities, including scuba, adventure, yachting, and honeymoons/marriage. Of these four activities, the greatest number of VL visitors participated in adventure activities. Those who spent the most time in Fiji (not the region), were yachters who spent an average of 22 nights. Yachting visitors also spent the most per night (713 FJD) and per trip (15,963 FJD) because of their lengthy stay. That said, they represent a small number of the visitors who arrived in Fiji in 2022.

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

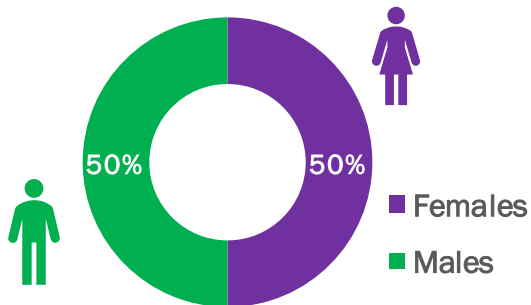
TOTAL 2022 VISITORS (%) BY SOURCE MARKET*



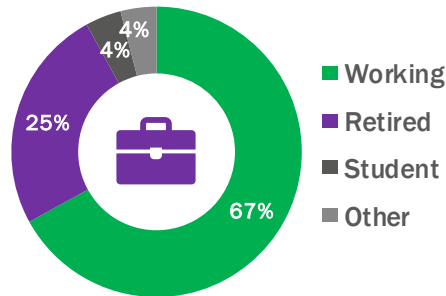
AGE OF PARTY HEAD (%)**



GENDER**



EMPLOYMENT STATUS**

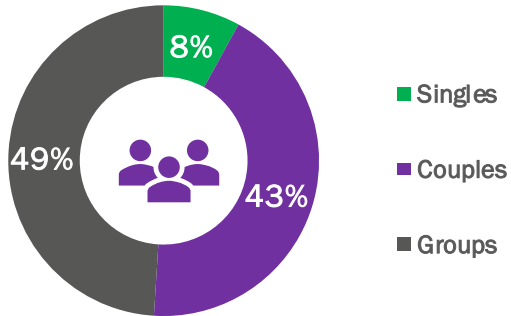


In 2022, nearly half of all visitors to Taveuni came from the U.S., and over a quarter arrived from Australia. Party heads of those who visited the region were generally over the age of 50, evenly split by gender, and working (although about 25% of visitors to the region were retired).

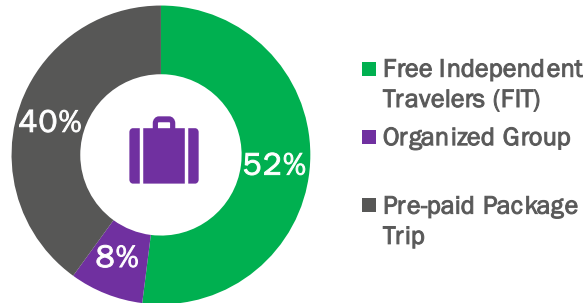
*:Based on weighted survey data

**Characteristics of survey respondents only 97

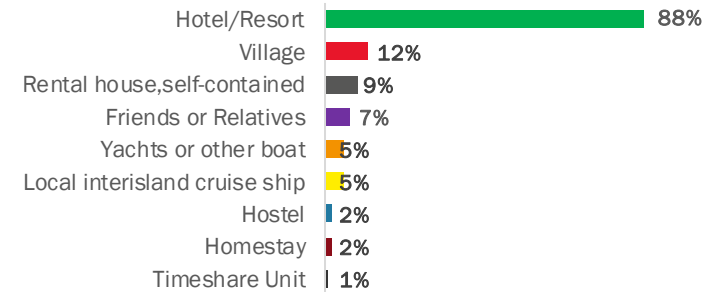
PARTY SIZE



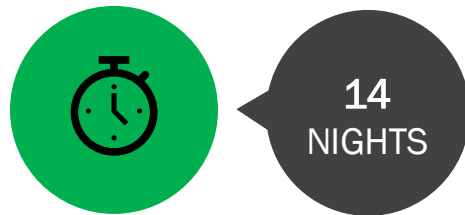
TYPE OF TRAVELERS*



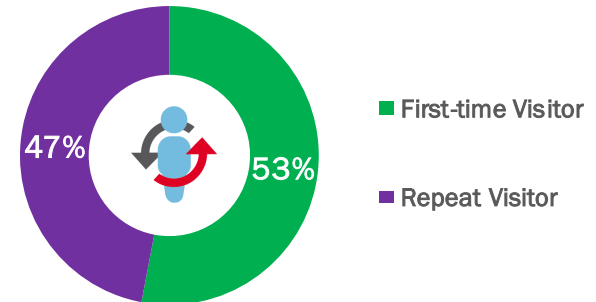
ACCOMMODATION



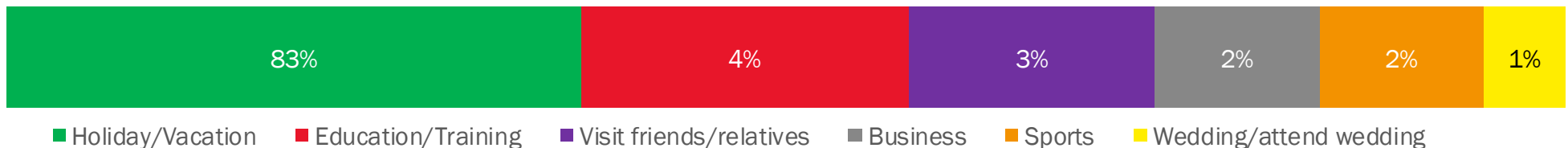
AVERAGE LENGTH OF STAY



NEW OR RETURNING



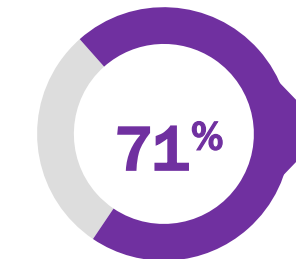
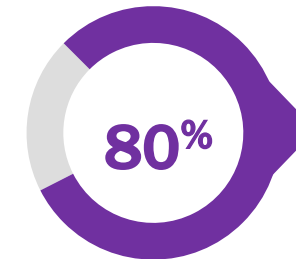
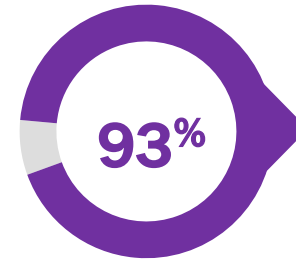
PURPOSE OF VISIT (%)



Those who visited Taveuni came to Fiji mostly as groups or couples. About half came as free, independent travelers, while about 40% came as part of a pre-paid package trip. A little over half were first-time visitors to Fiji. Vanua Levu visitors spent about 14 nights in Fiji and stayed primarily at a hotel/resort. Over 80% of those who visited the region came to Fiji on holiday/vacation.

*: Organized group consists of respondents who travelled with a tour or school group, regardless of if they paid for a package trip.

SATISFACTION WITH FIJI EXPERIENCE



LIKELY TO VISIT FIJI IN THE NEXT 5 YEARS

Among those who visited Vanua Levu, overall satisfaction for the Fiji visit was 93%. Visitors to the region noted a significant level of satisfaction with the customer service they experienced in Fiji, the cultural activities they experienced, and the quality of accommodations in Fiji, among other factors.

Satisfaction and recommendations: the percent of visitors who rated a 7 to 10 on a scale where 1=Not at all satisfied/likely and 10=Extremely satisfied/likely

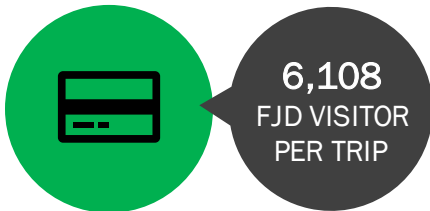
SCUBA

9,295

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



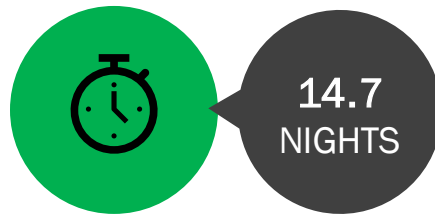
SPEND

436 FJD Per Night

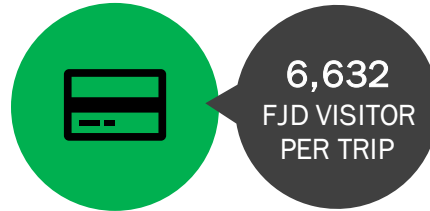
ADVENTURE

10,496

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



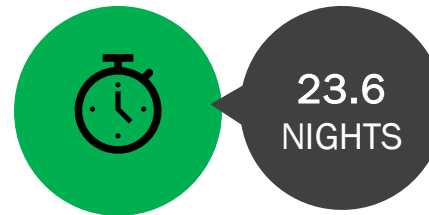
SPEND

451 FJD Per Night

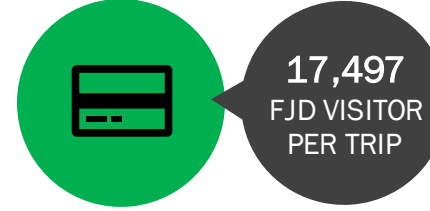
YACHTING

1,026

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



SPEND

742 FJD Per Night

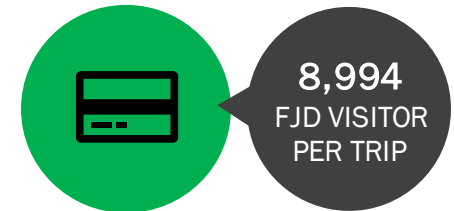
HONEYMOON/MARRIAGE

1,527

ESTIMATED VISITORS



AVERAGE LENGTH OF STAY



SPEND

756 FJD Per Night

Taveuni visitors participated in a number of activities, including scuba, adventure, yachting, and honeymoons/marriage. Of these four activities, the greatest number of visitors participated in adventure activities, though a comparable number indicated they participated in scuba diving. Yachters spent the most time in Fiji (not Taveuni) at an average of 23.6 nights. Those who indicated they were on honeymoon or marriage spent the most per night (756 FJD), but because yachters spent more time in Fiji, that subgroup of visitors spent 17,497 FJD per trip. Again, those who yacht and those who come for honeymoon or marriage represent a small subset of all visitors; therefore, their spending, while large, has a limited overall impact on Fiji's economy.

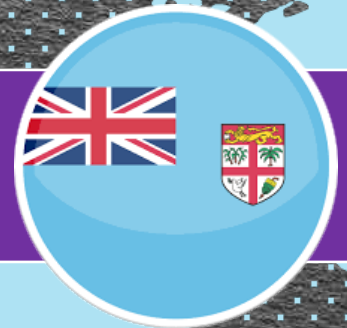
Note: Purpose of visit percentages based on IVS responses not actual immigration data.



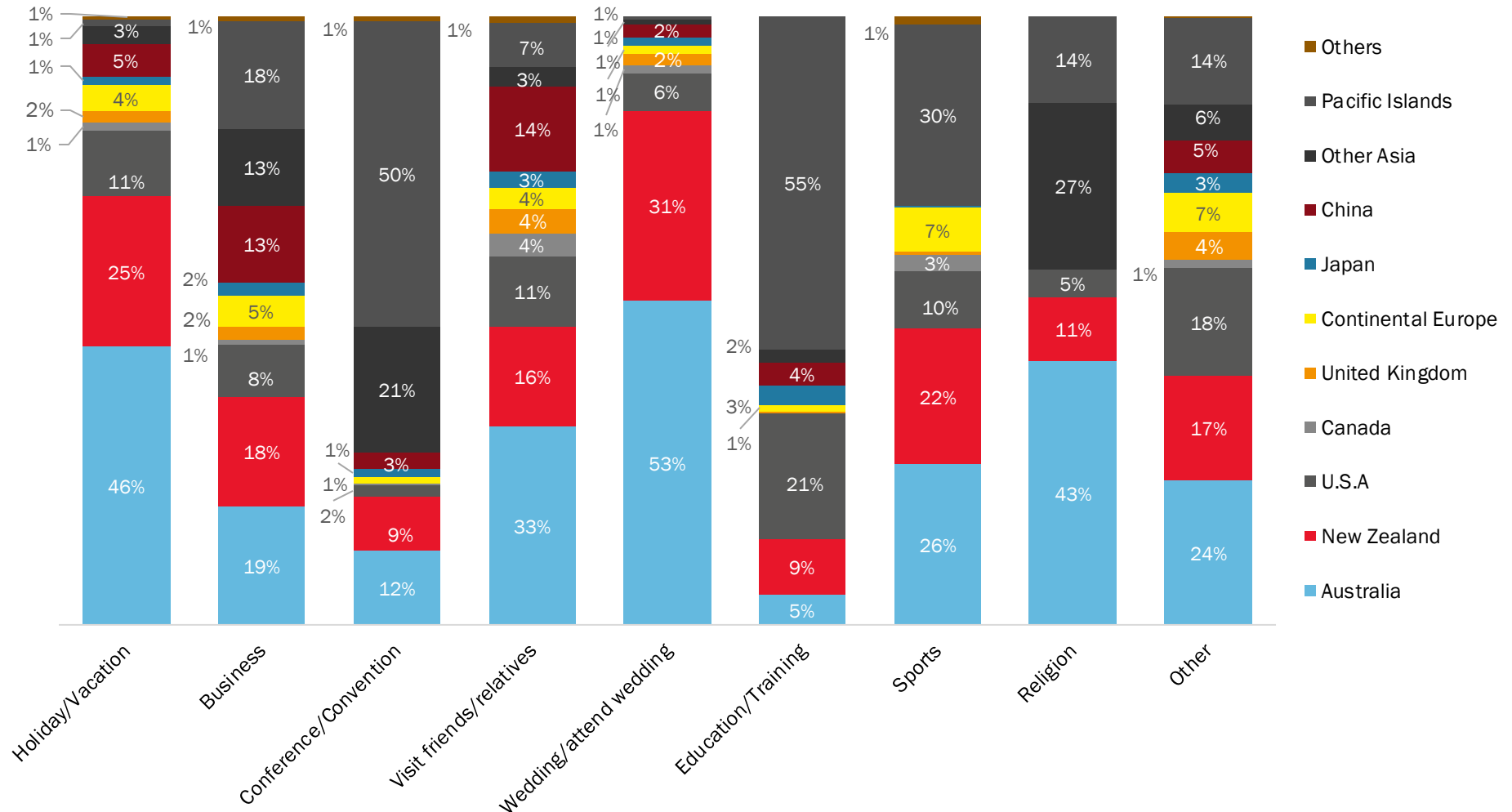
APPENDIX



FIJI

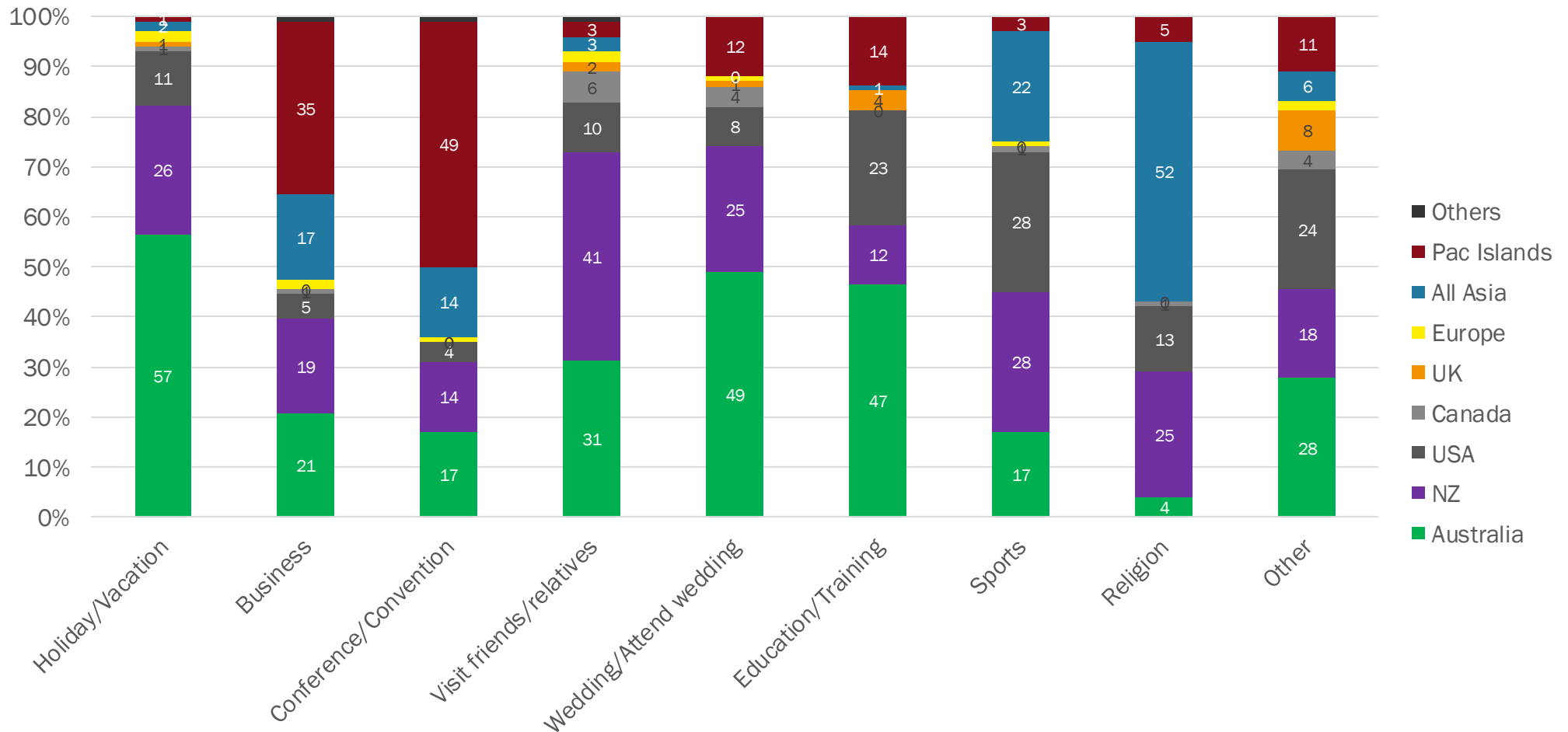


MAIN REASON FOR VISITING FIJI (Percent of visitors by Purpose of Visit)



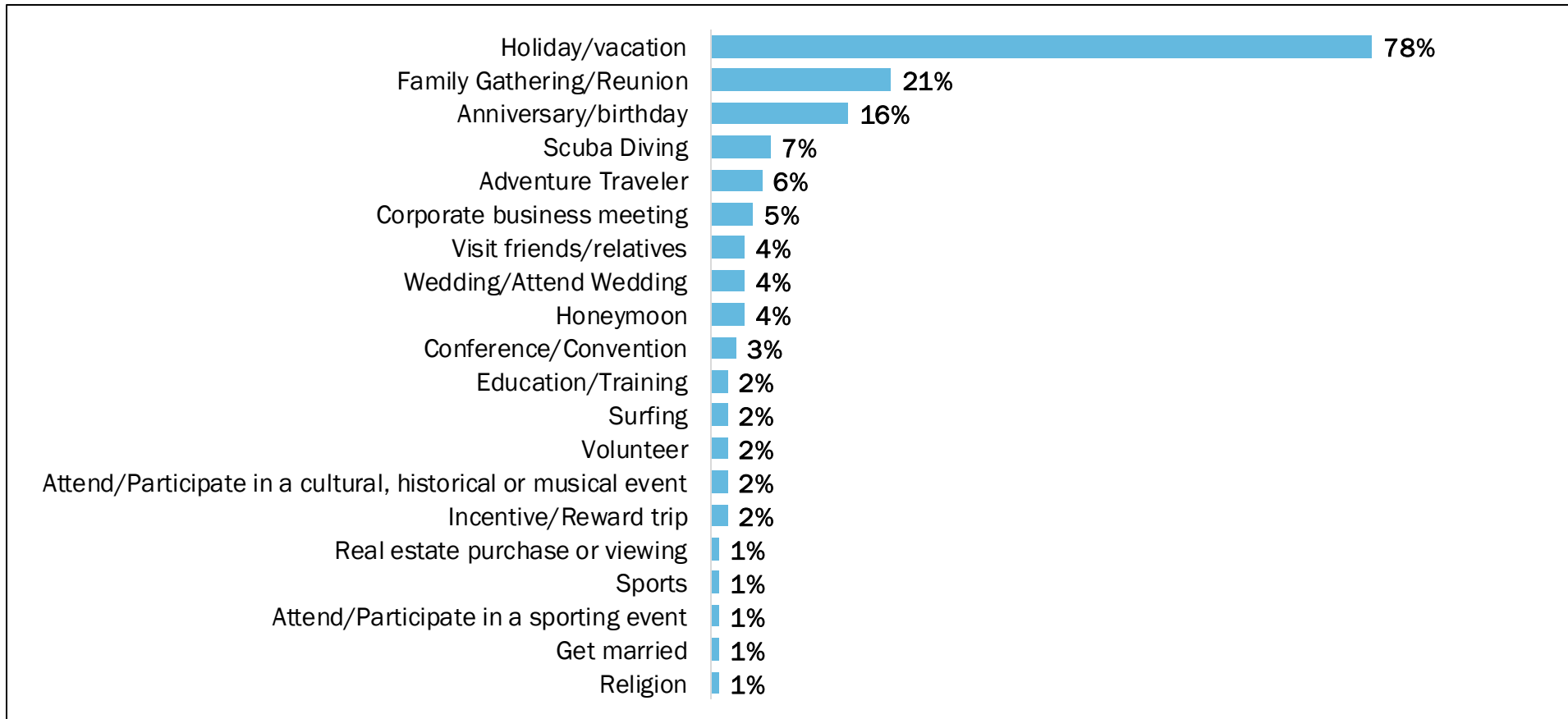
Business travellers were largely from Australia, New Zealand and the Pacific Islands, but also to a lesser extent from China and Other Asia. A significant number of conference attendees came from the Pacific Islands and Other Asia. A third of visitors to see friends and relatives came from Australia with others distributed across New Zealand, U.S.A, and China. While weddings were dominated by Australians and New Zealanders.

MAIN REASON FOR VISITING FIJI (Percent of visitors by Purpose of Visit)



The bulk of visitors visited Fiji on holiday/vacation, and among that group Australians were the largest source. Australians also made up the largest segment of those who visited Fiji to get married/attend a wedding and participate in education/training. Pacific Islanders comprised the largest block of visitors who visited Fiji for business and conferences/conventions. Residents of New Zealand comprised the largest block of those visiting friend and relatives. Visitors from Asia constituted the largest share of those who visited Fiji for religious purposes. Among those who visited Fiji mainly for sports, residents of New Zealand and the U.S. were the two largest groups.

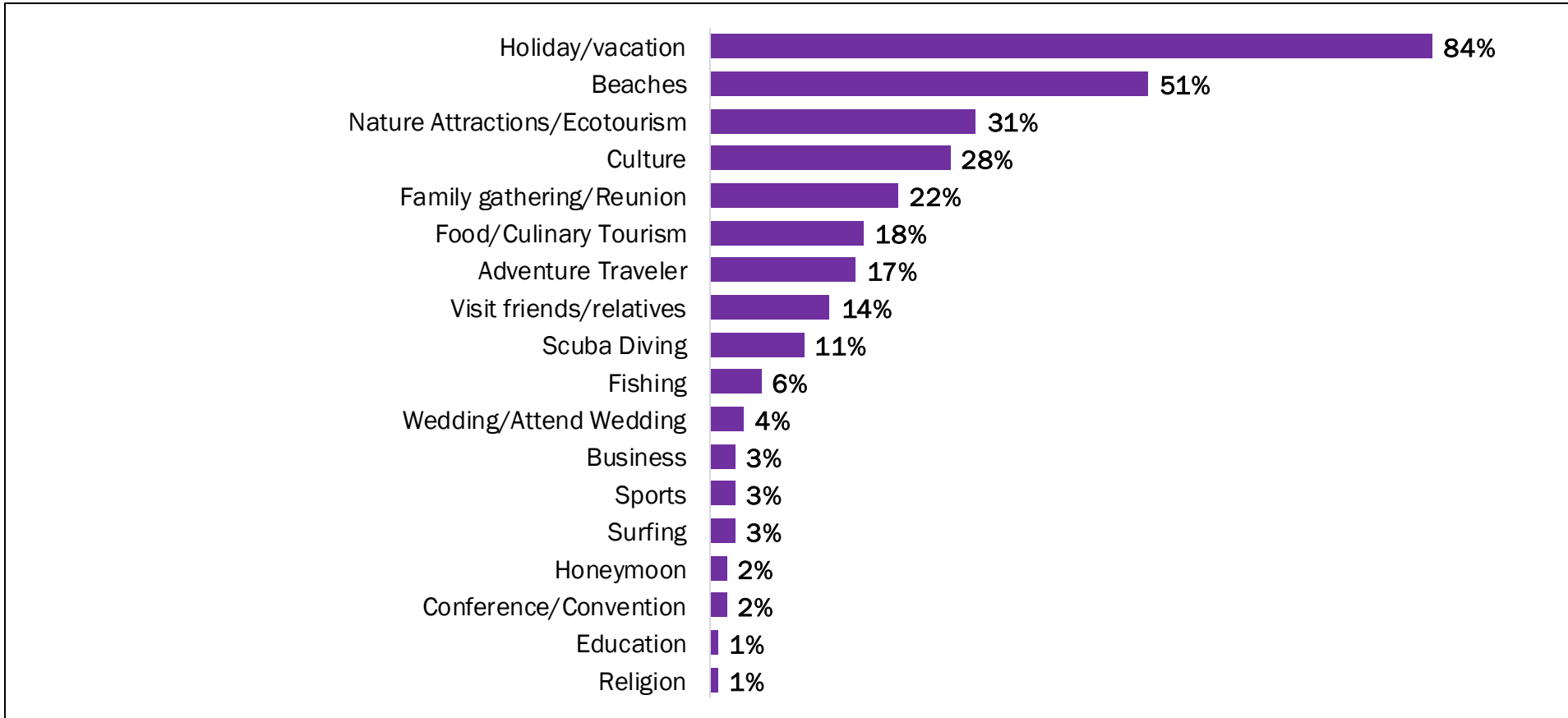
ALL REASONS FOR VISITING FIJI (Percent of Total Visitors*)



Beyond the holiday/vacation traveller, one-fifth of visitors came for the specific purpose of a family gathering or reunion and a slightly lesser amount stated that they came to celebrate an anniversary or birthday. Adventure travel, including surfing and diving, accounted for as much as 15% of travellers. The honeymoon and wedding niche market was not quite as large (4% for honeymoon, 4% to attend a wedding, or 1% to get married).

*Visitors could select more than one purpose of visit; therefore totals do not add up to 100%.

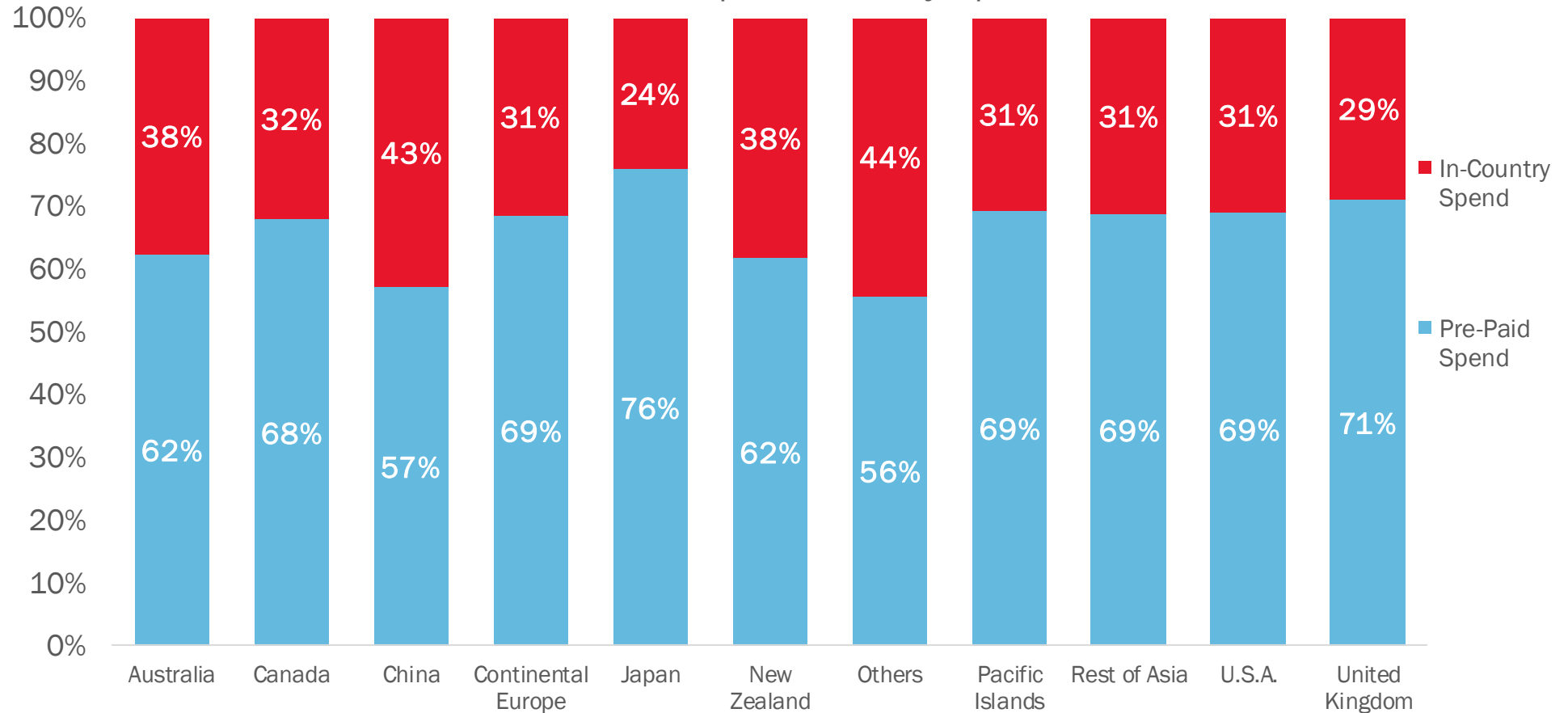
ALL REASONS FOR VISITING FIJI (Percent of Total Visitors*)



While the overwhelming purpose for visiting Fiji was holiday/vacation, visitors also noted other reasons for visiting. Just over half specifically noted Fiji’s beaches, while nearly one-third mentioned ecotourism and culture. Other prominent reasons, which include a mixture of “active” reasons and more “relaxation-oriented” reasons, include family reunions, culinary tourism, adventure travelling, visiting friends, and scuba diving.

*Visitors could select more than one purpose of visit; therefore totals do not add up to 100%.

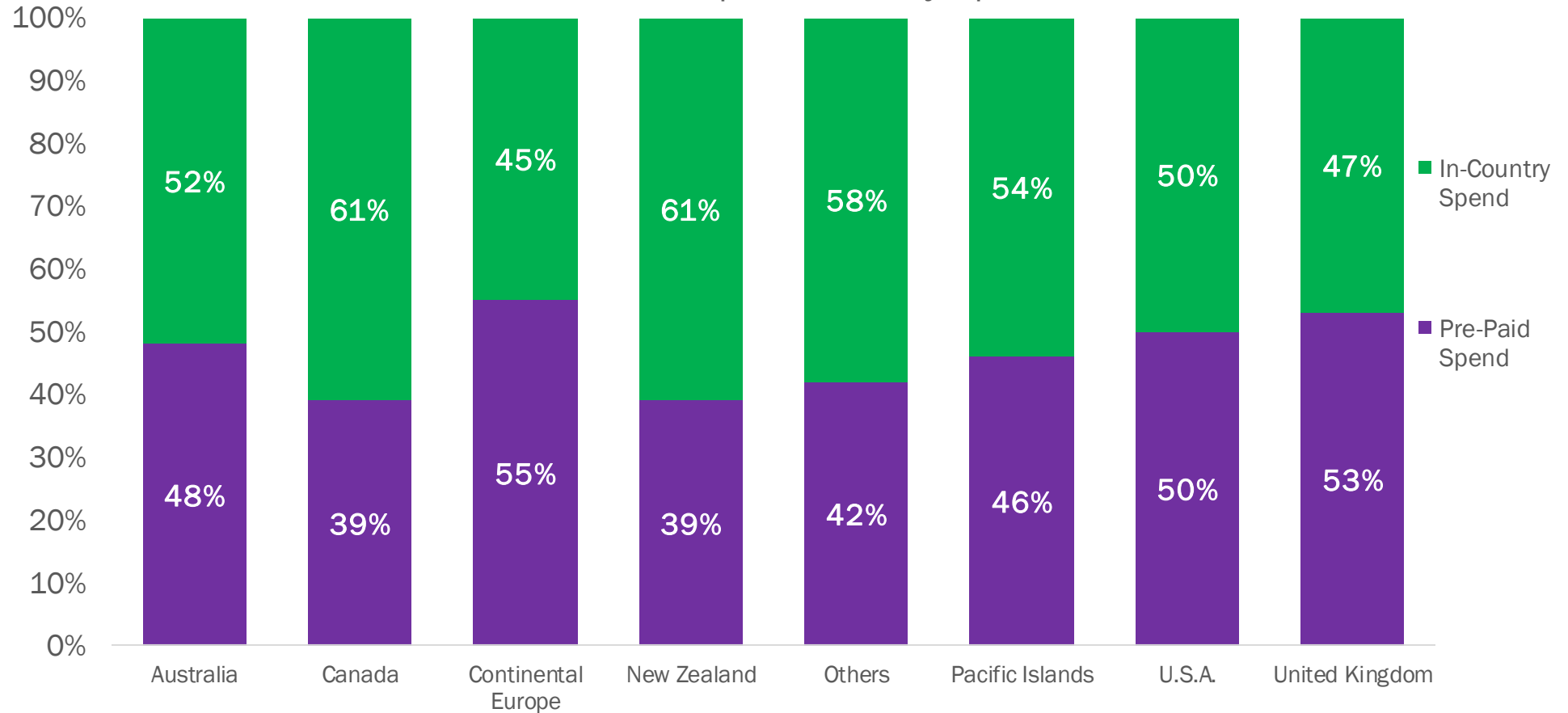
Distribution of Pre-paid and In-Fiji Spend



All visitors spent more before coming to Fiji, particularly because the calculation included 50% of the International Airfare and all other pre-paid travel package expenses. Japanese visitors spent the most before arrival while Chinese visitors were more apt to purchase while in Fiji. Australians and New Zealanders spent less on pre-paid, since they have a high rate of return visitors and are closer in distance, they were less likely to buy a pre-paid package and their spend on international airfare was lower.

2019 spending figures are not comparable to previous years due to a change in methodology. Similar to other Pacific nations: Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare.

Distribution of Pre-paid and In-Fiji Spend



In 2019, pre-paid spending accounted for about 66% of all spending. In 2022, pre-paid spending accounted for around 46% of all spending. The IVS data reveal visitors spent considerably more on lodging and accommodations, tours, food, and other post-arrival goods and services compared to previous years. Generally speaking, pre-paid spending was highest in those countries furthest away from Fiji, primarily due to higher airfare costs.

Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare.

RESPONSE RATE DATA

2019 TOTAL VISITORS

 **205,690**

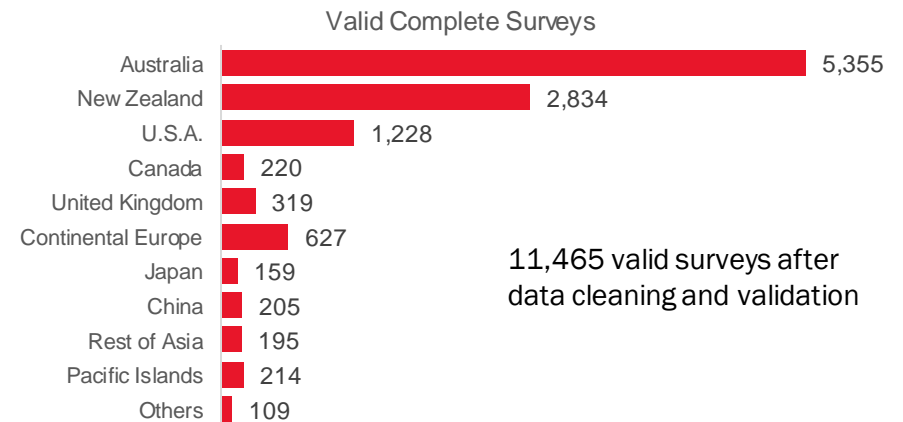
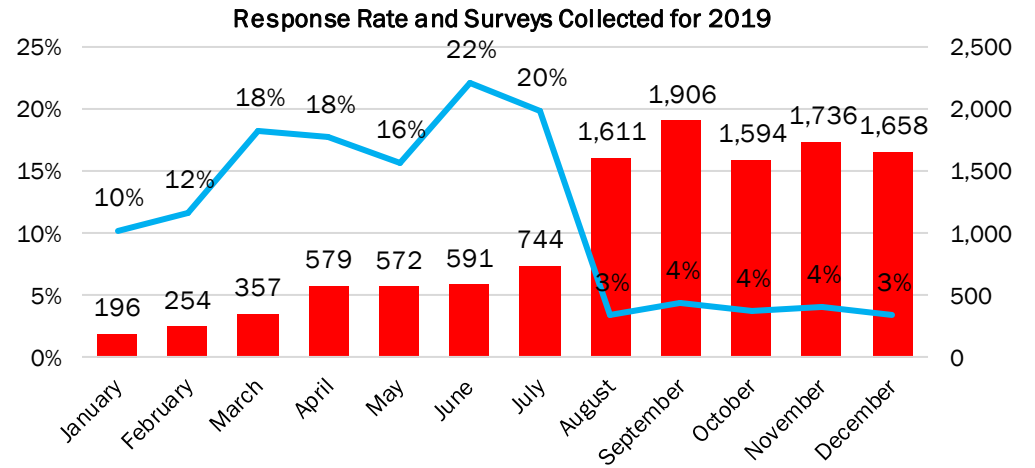
TOTAL NUMBER OF EMAILS SENT

 **11,798**

TOTAL NUMBER OF RESPONSES

6%

RESPONSE RATE



11,465 valid surveys after data cleaning and validation

Survey launch was delayed until March 2019 which resulted in lower response rates for the first two months. As data collection at the Nadi International Airport improved, we have also seen higher numbers of completed surveys (45,579 valid email collected, 8,768 completed surveys, 19% response rate). Starting in August, a second source of email addresses were provided through the Airport Wi-Fi login resulting in a higher number of collected surveys but a lower response rate (160,111 valid emails, 3,030 completed surveys, 2% response rate). The combination of the two methods yielded 11,798 completed surveys at a 6% response rate.



269,738

TOTAL NUMBER OF EMAILS SENT



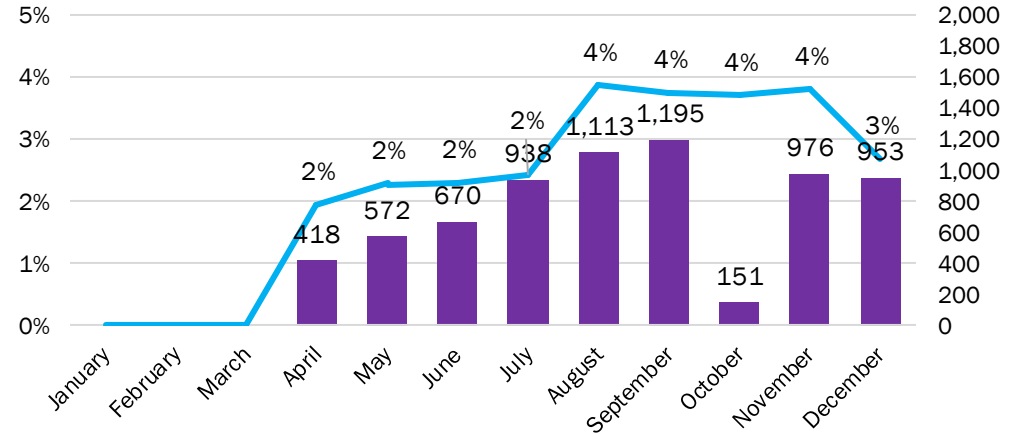
6,986

TOTAL NUMBER OF RESPONSES

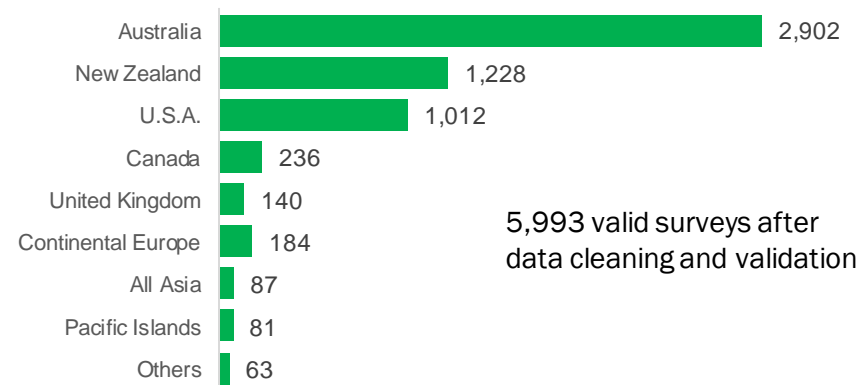
3%

RESPONSE RATE

Response Rate and Surveys Collected for 2022



Valid Complete Surveys



5,993 valid surveys after data cleaning and validation

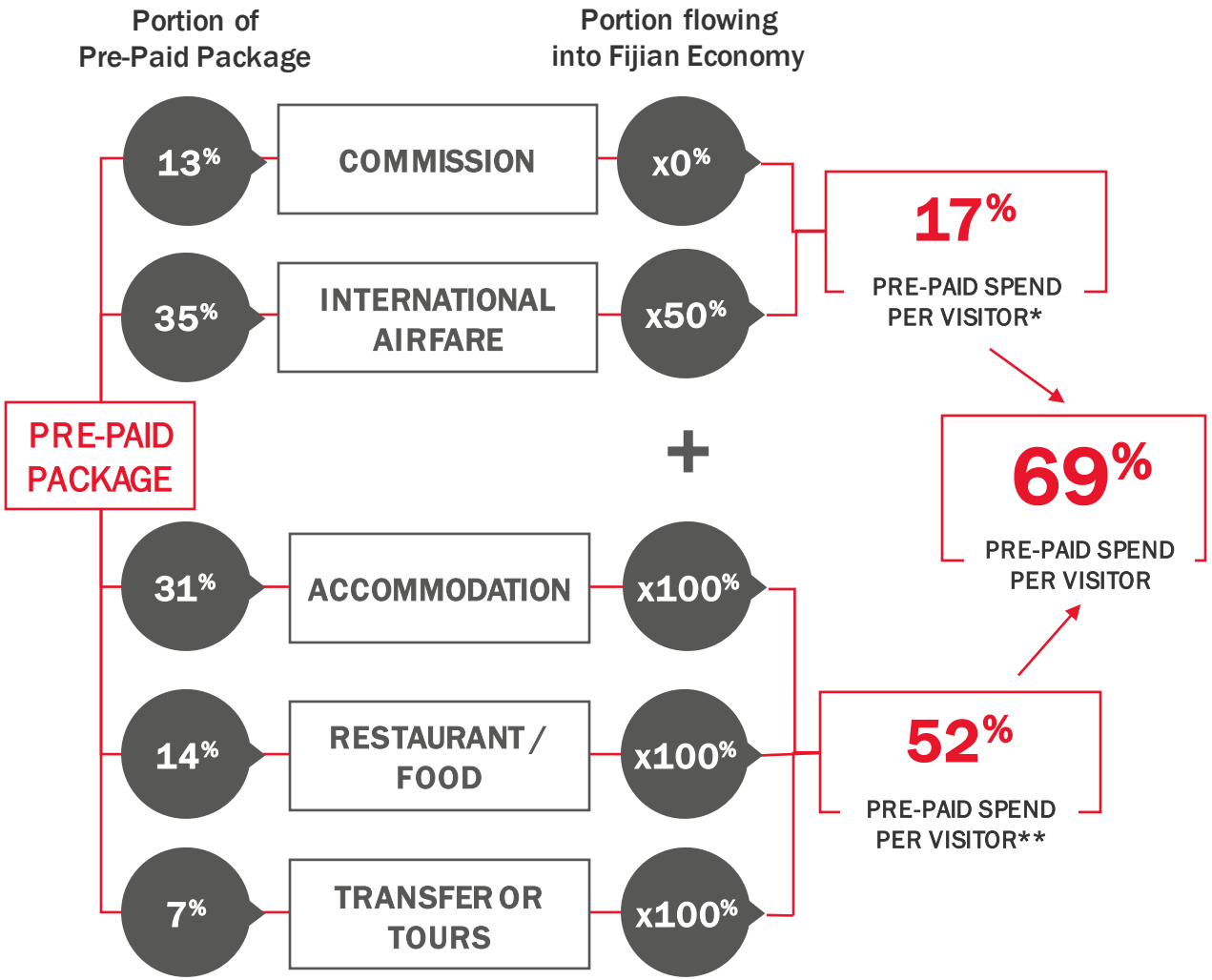
Fielding for the 2022 IVS began April and ran through December 2022. In October, nearly all of the Wifi collected email addresses were lost due to data failure, which limited the number of emails sent and survey data collected. The response rates for August through December resembled those in 2019, but due to the smaller number of visitors, overall volume was down compared to 2019. While nearly 7,000 surveys were submitted, just under 6,000 were included in the analysis. Those removed from the analysis were excluded due to missing data on most variables or key variables, or because the data did not include legitimate/serious responses.

✓ 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.



*2019 spending figures are not comparable to previous years due to a change in methodology. Similar to other Pacific nations: Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare

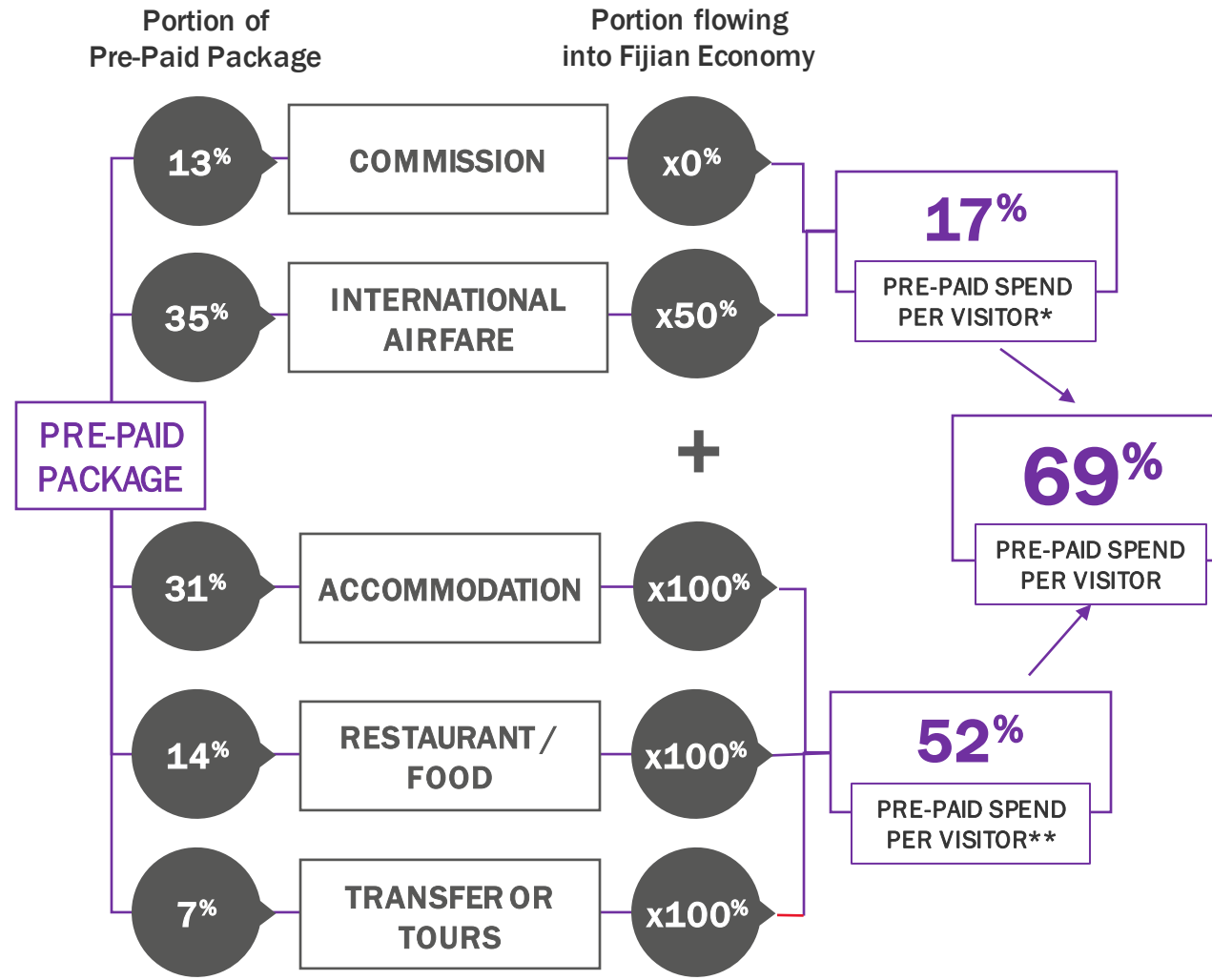
**If an airfare price was not given or the value given appeared out of range, the case was assigned the average airfare published by Diio MI.

✓ 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.



**If an airfare price was not given or the value given appeared out of range, the case was assigned the average airfare published by Diio MI.



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 Tourism and Civil Aviation of the Government of the Republic of Fiji.



UNUSABLE SLIDES FROM 2020 REPORT





100% of destinations worldwide had some level of travel restriction in place by April 2020.



UNWTO estimates that travel and tourism will decline by 58 to 78 percent in 2020.



World Travel and Tourism Council estimated that 63 million jobs in Asia Pacific are at risk (as of April 2020).



Reserve Bank of Fiji, estimates the Fijian economy will contract more sharply than the earlier predicted 4.3% in 2020.



Improving health and hygiene is critical to build consumer confidence.



Long term tourism recovery requires tourism businesses and SMEs to survive in the short term.



Increased competition among destinations will require strong destinations awareness marketing when travel resumes.



Protecting jobs for women is necessary to limit gender impacts of COVID-19

2019

JAPAN



14,868

TOTAL VISITORS

FJD 47M

TOTAL SPEND

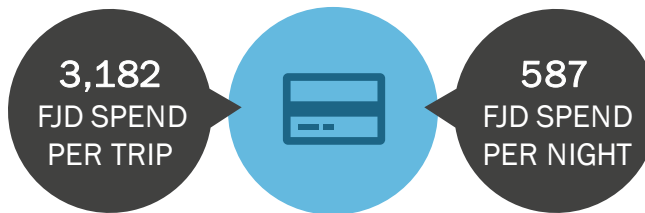
FJD 36M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



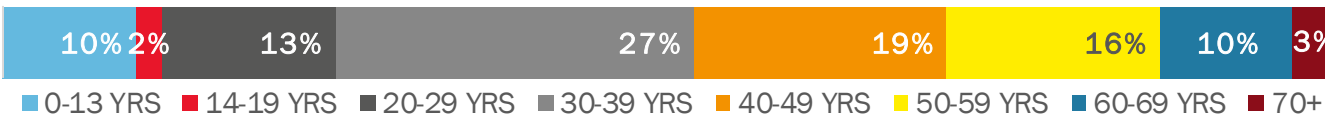
SPEND



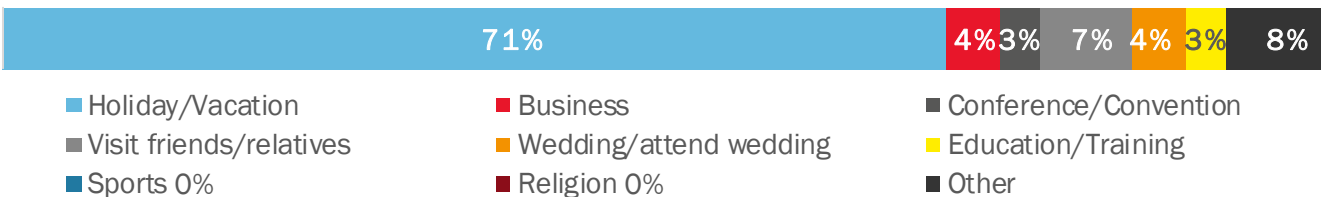
SATISFACTION



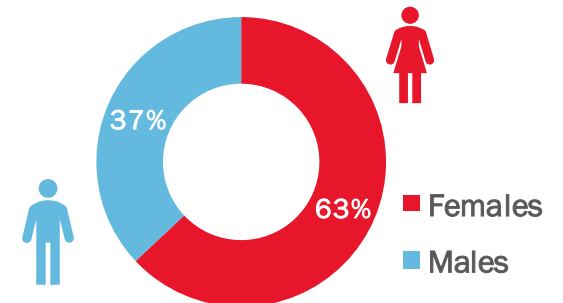
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

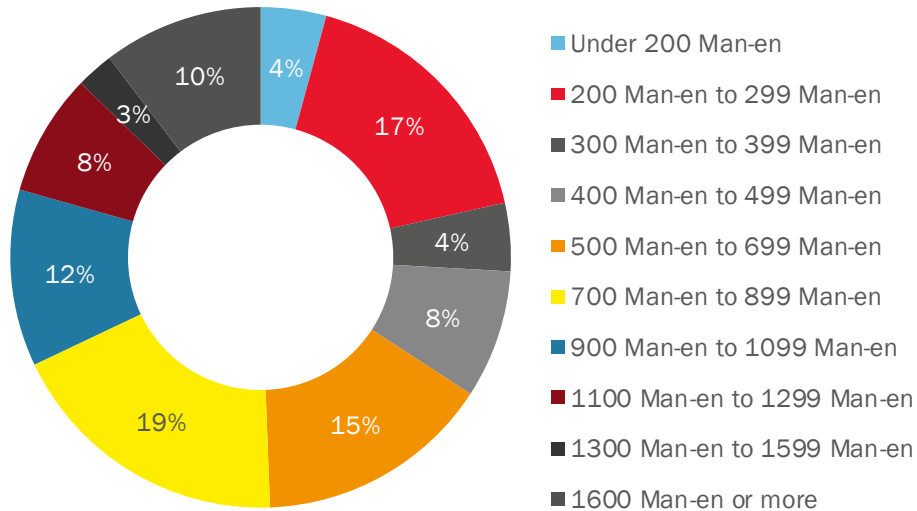


Japan is a promising growth market with a +24.9% increase in arrivals and accounted for 2% of visitors. Daily spending (\$587 per person per night) was the highest among the major markets with much of the spending done before arrival (77%). Two out of every three Japanese visitors were female, and 45% were in their 30's or 40's. Japanese visitors stayed only a short time at just over 5 nights.

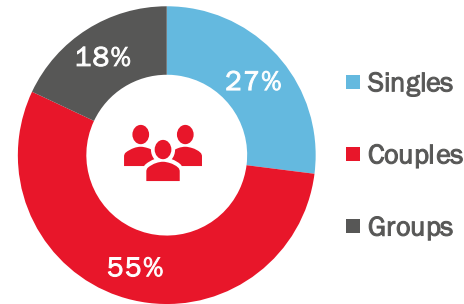
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

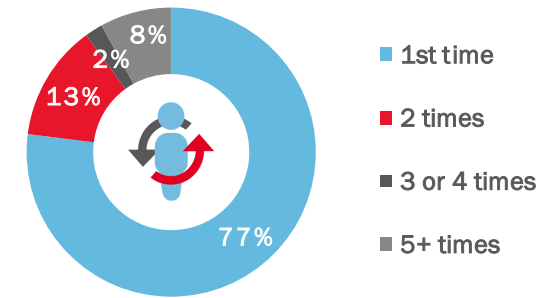
ANNUAL HOUSEHOLD INCOME (JPY)*



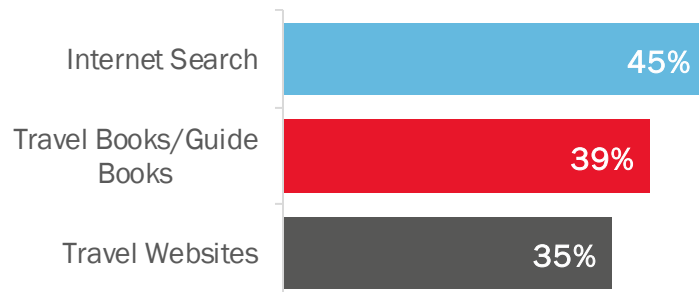
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING**



TOP INFLUENCING FACTORS FOR VISITING*



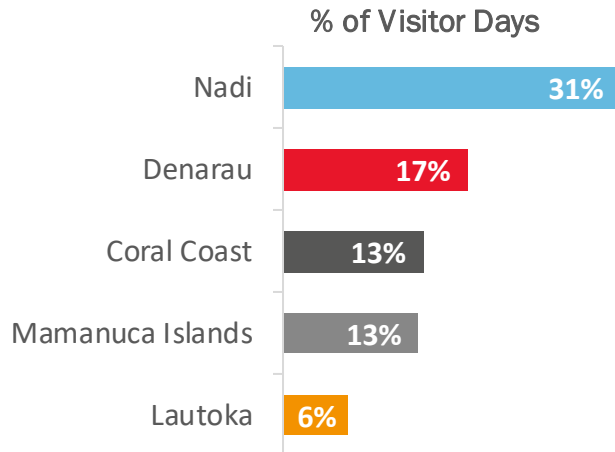
Household income was concentrated between 500 Man-en* (5 million) and 900 Man-en but there was also a group in the 200-299 Man-en category. Half of the visitors travelled in pairs and another third travelled alone. The vast majority were first-timers. Internet searches was the top source for planning information, though the traditional Japanese guidebook and travel websites were also highly accessed resources. Visitors who came to Fiji were seeking a new destination with spectacular landscape and scenery.

*Man-en is a currency denomination in Japan, referring to "10,000 Yen"
 **Multiple responses, therefore, totals do not add up to 100%.

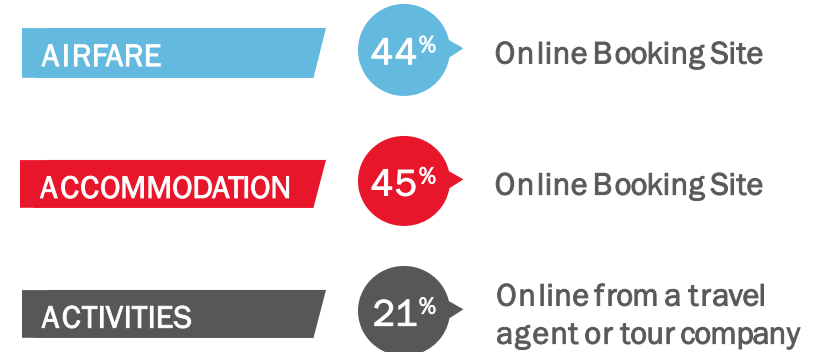
Note: Sample size is relatively small.



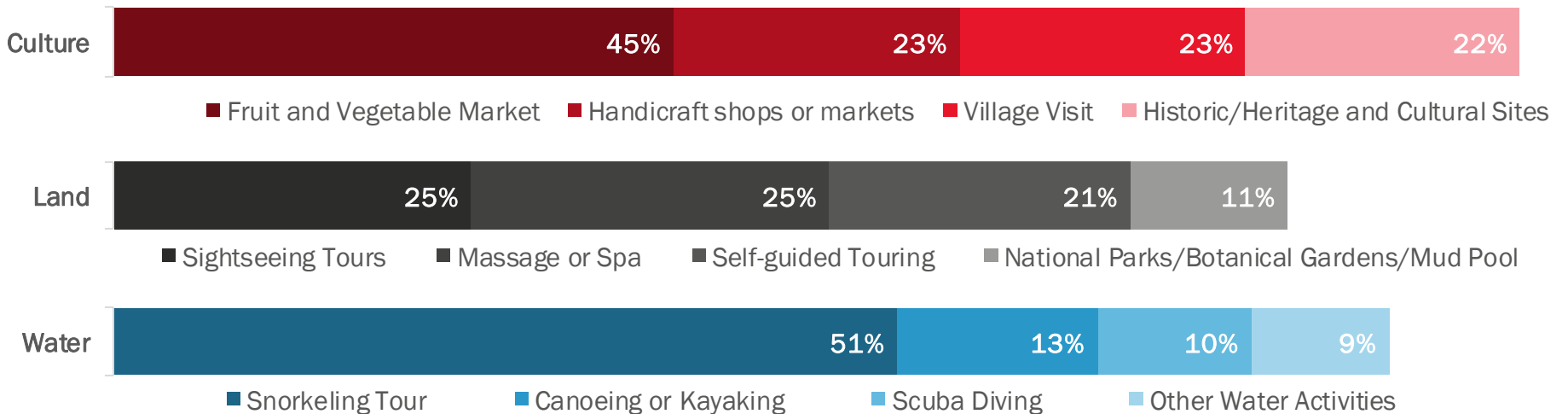
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



Japanese visitors mainly visited Nadi with others also staying in Denarau. The online booking site was the primary method for booking airfare and accommodations. Not many purchased additional activities but of those that did, activities were booked through an online travel agent instead of the traditional post arrival activities desk. Japanese liked to explore the local food markets and do snorkelling tours. Otherwise they did a variety of activities including visiting gardens and parks.

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

Note: Sample size is relatively small.

2019

CHINA

*Includes Hong Kong



49,169

TOTAL VISITORS

FJD 236M

TOTAL SPEND

FJD 135M

PRE-PAID SPEND

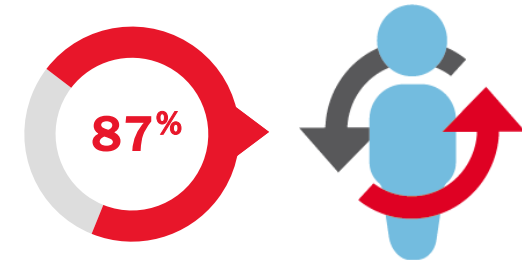
AVERAGE LENGTH OF STAY



SPEND



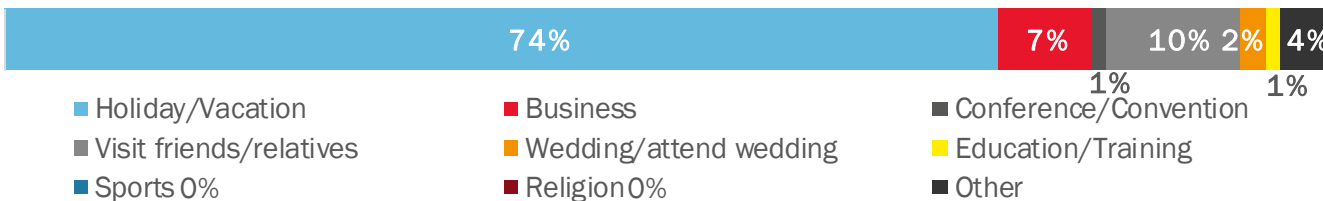
SATISFACTION



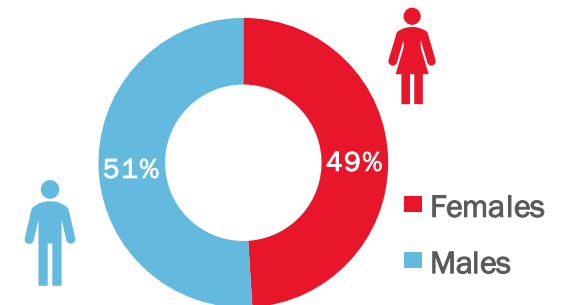
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



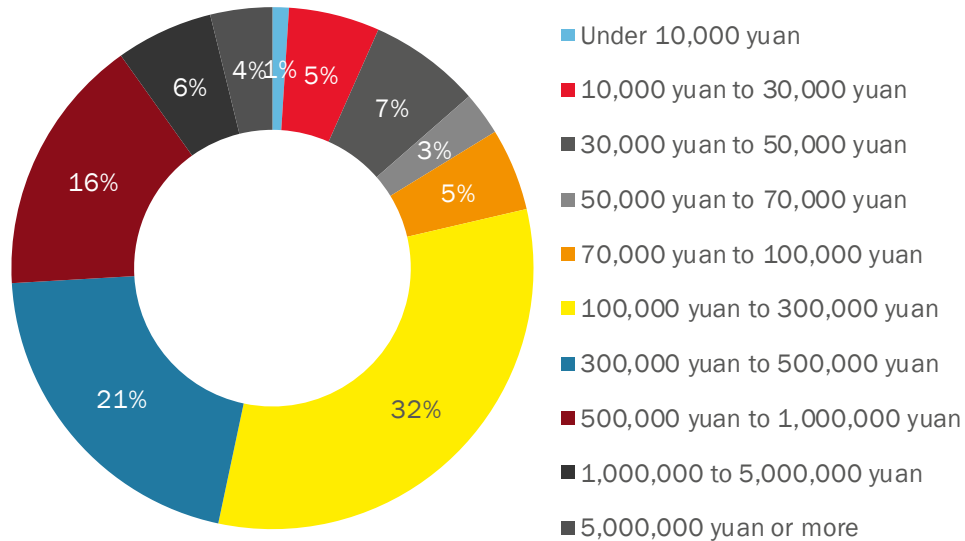
China was the largest source market out of Asia, with 5.5% of all arrivals. However, visitation was down -2.3% in 2019, even with a spike in Hong Kong visitors (+101.9%) . Chinese visitors spent only 8.8 nights on average. Visitors were split almost evenly between men and women. Chinese visitors spent the most of any country in post arrival spend per night and only second to Japan in total per person daily spending.

Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

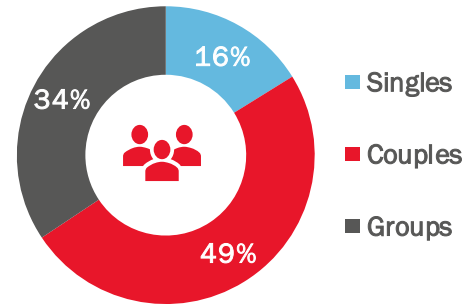
Note: Sample size is relatively small.

ANNUAL HOUSEHOLD INCOME (CNY)

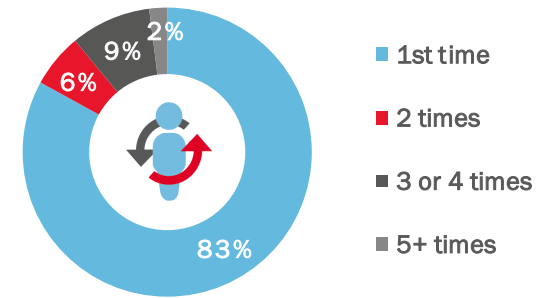
*Includes Hong Kong



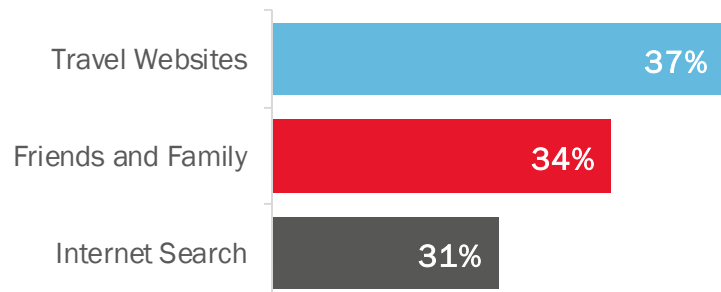
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



Household incomes were concentrated around 100K-300K Yuan. Chinese visitors came as couples or group travel with most being their first time. The travel websites, recommendations from friends and family and Internet searches were the common channels for information. Fiji's reputation for spectacular landscapes and scenery was a driver, as was the opportunity to travel to a new destination.

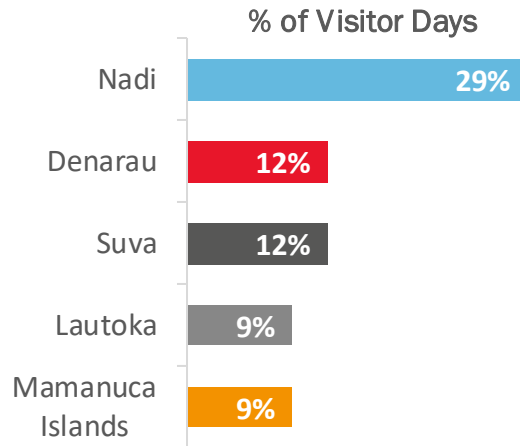
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

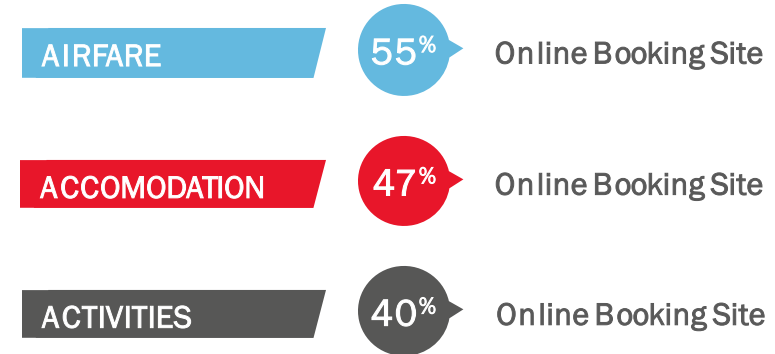
*Includes Hong Kong



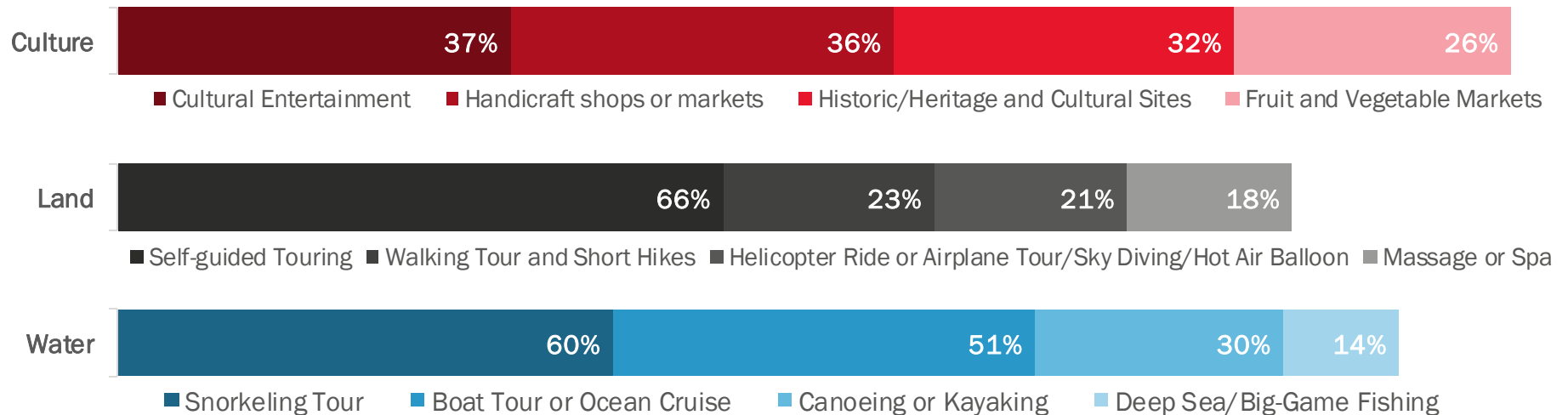
TOP 5 REGIONS VISITED*



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



Chinese visitors spent the most time in Nadi and some visitors also went to Denarau and Suva. The online booking site was the dominant method for booking airfare, accommodations and even tours and activities. Much more than other markets, self-guided touring was a common activity for many visitors. Many also engaged in a snorkelling tour or canoeing/kayaking.

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

Note: Sample size is relatively small.

Prepared by SMS Research &
Marketing Services, Inc.



FIJI



IFC's work in Fiji is supported by the Government of Australia under the Fiji Private Sector Development Partnership, which aims to improve the competitiveness of the private sector and stimulate inclusive and climate-smart private investment in Fiji.