




# **International Visitor Survey 2014**

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Prepared for MITT by StollzNow Research

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## FOREWORD BY THE HONOURABLE MINISTER

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The 2014 International Visitor Survey Report (IVS) represents the Fijian Government's commitment to its vision to achieve a \$2 billion industry by 2020.

The Fijian Government recognizes the Fijian Tourism industry as one of the key sectors driving Fiji's economic growth. To ensure the tourism sector remains vibrant on a sustained basis, Government is devising policies aimed at keeping pace and adapting to new global trends in tourism. The Government acknowledges that the tourism sector is increasingly moving into a more complex phase of its development. In this regard, policies are geared to promote greater coordination among stakeholders in order to maximize tourism yield. We need to diversify the range of value added products and services as well as our clientele by attracting visitors from new and emerging markets whilst at the same time seek to retain our traditional markets.

To achieve the desired results, the Government has created and continues to create an enabling environment for private sector growth as the private sector is the engine of Fiji's thriving tourism industry. To ensure sustained growth in a constantly changing travel and tourism environment, access to real time tourism research is of crucial importance.

The 2014 International Visitor Survey Report is the enabling tool that will open up various opportunities to support the growth of Fiji as a leading tourism destination through policy development, planning and business decision making. The Report will also be a key supporting tool for marketing and assist Government and tourism stakeholders in reviewing marketing strategies, anticipate changing customer needs and responding accordingly in terms of our product offering.

The importance of quality tourism research cannot be overemphasised. The 2014 International Visitor Survey Report is part of the Fijian Government's renewed efforts to develop a strong and sustainable tourism industry, supported by sound research initiatives.

A handwritten signature in black ink, appearing to be 'Faiyaz Siddiq Koya'. The signature is stylized and written in a cursive-like font.

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



## STATEMENT BY THE PERMANENT SECRETARY

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The 2014 International Visitor Survey Report is an important output of the Ministry of Industry, Trade and Tourism. The Report is the final product of an all-year-round survey of a sample of all departing visitors carried out by the Ministry's dedicated Tourism Research Team based at the Nadi International Airport.

The Report provides both qualitative and quantitative assessment of visitors to Fiji. Among other things, the Report details key information such as the behavioral patterns of our international visitors, their spending patterns and distribution by Province and Tourism Areas, the activities they engage in while in Fiji and information sources used to plan their visit to Fiji. These findings provide the Fijian Government and Fijian businesses critical information to inform policy as well as business strategies and planning. Additionally, the Report provides Government and Tourism industry operators the opportunity to establish the latest trends in visitor preferences and monitor changing behavior patterns of visitors over time in order to respond with sound policy and business decisions. The Report is also intended to be used by Government agencies and development partners as a reference point for future development planning.

On behalf of the Ministry of Industry, Trade and Tourism, I would like to thank StollzNow Research for partnering with the Ministry in preparing the 2014 IVS Report, conducting an overall review of the Fiji IVS and implementing a capacity building program within the Tourism Research Unit, the program is expected to be completed in 2017. This is a positive step in the right direction in the Ministry's effort to produce future IVS reports internally.

Let me take this opportunity to sincerely thank and acknowledge the following key stakeholders from the public and private sector for their invaluable contribution which assisted in determining the contents of the Report, devising a method of calculation for the retention rate, and providing insights for the overall review of Fiji's IVS:

Eco-Tourism Association of Fiji  
Fiji Airways  
Fiji Hotel & Tourism Association  
Fiji Independent Traveler & Backpackers Association  
Tourism Fiji

Fiji Bureau of Statistics  
Fiji National University  
Reserve Bank of Fiji  
University of the South Pacific

Last but not least, I would like to sincerely thank all our departing visitors at Nadi International Airport who took the time to respond to the Fiji International Visitor Survey 2014, for without their cooperation and solid feedback, this Report would not have been possible.

I am pleased to present the 2014 International Visitor Survey Report, a testament of the Ministry of Industry, Trade and Tourism's effort to support the growth of Fiji's tourism industry.



Shaheen Ali  
Permanent Secretary for Industry, Trade and Tourism

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# 1 INTRODUCTION

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The 2014 International Visitor Survey provides a summary of key statistics and information to assist in improving the quality of tourism services and enhance the development of tourism products in Fiji. These indicators will also help ascertain visitor preferences and experiences overtime and better position the Fijian tourism industry to meet these changes in the long run.

The purpose of this survey is to provide Government policy makers and key tourism stakeholders with timely, comprehensive and accurate information on the characteristics, preferences and expectations of our visitors. Due to a break in data reporting since 2009, this report does not include data for previous years.

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

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

This report includes expenditure figures for both those who have paid for travel directly to Fiji (direct bookings/no bookings) and those who have travelled to Fiji on a 'package' purchased through a travel agent. An improved methodology for calculation of expenditure (detailed within this report) identifies spend that does not reach Fiji.

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

There is also a significant number of visitors who are not part of recreational tourism but also make a significant contribution to the Fijian economy. The findings allow Government and the industry to also understand the contribution of these visitors to the economy, providing insights into how these markets can be developed.

This report has been prepared by StollzNow Research and the Ministry of Industry, Trade and Tourism (MITT).

## 2 KEY FINDINGS

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### **Total Visitors**

In the year ending December 2014 there was a total of 692,630 visitors as recorded by the Fiji Bureau of Statistics. Of these arrivals, the main reasons according to the visitor survey are shown below:

Those visiting for a 'holiday/vacation' are the largest group (79%), followed by 'transit' (11%), business (4%), 'visiting friends and relatives' (3%) and 'conference/convention' (2%).

Australia was the largest source market (52%) followed by New Zealand (16%), USA (7%), and China (1%). Almost all of visitors from China were from the 'mainland' rather than Hong Kong.

Top regional groups for visitors are Pacific Islands (10%) and Continental Europe (6%).

### **Province and Tourism Areas Visited**

The top two Provinces visited are Ba (58%) and Nadroga/Navosa (49%). These figures add to more than one hundred percent as visitors on average went to 1.25 Provinces.

The top Tourism Areas visited are Denarau (35%), Coral Coast (27%), Nadi (24%) and Mamanuca (20%). Visitors on average went to 1.36 Tourism Areas.

### **Main reason for visiting and main reason for holiday/vacation**

The main reason for visiting Fiji was for a 'holiday/vacation' (79%). Of this group the main reason for a holiday/vacation was 'rest and relaxation' (85%). Niche markets are 'honeymoon' (7%), 'wedding' (6%) 'scuba diving' (1%) and 'surfing' (<1%).

Expenditure data shows that these niche markets generate more spend per person than general 'holiday/vacation' visitors.

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

### **Backpackers**

Self-identified backpackers make up six percent (6%) of all visitors. In 2014 there were 41,557 backpackers. This group mostly come from United Kingdom (30%) and Continental Europe (25%).

### **Main destination**

Fiji was the main destination for seventy-nine percent (79%) of visitors. Those from Continental Europe (70%), United Kingdom (66%) and Canada (62%) are most likely to be visiting other countries as part of their trip.

### **Previous visits to Fiji**

Forty-two percent (42%) of visitors have previously visited Fiji. Those most likely to have made a previous visit are from Pacific Islands (78%), New Zealand (59%) and Australia (42%). Including the visit where the interview was completed, those from Pacific Islands have made an average of 5.2 visits, New Zealand 5.0 visits and Australia 3.2 visits.

### **Expectations of a visit to Fiji and recommendation**

Seventy-six percent (76%) found their visit was either 'more enjoyable' or 'much more enjoyable' than expected.

Eighty-four percent (84%) are highly likely to recommend Fiji as a place to visit to others. Fiji has a Net Promoter Score of 82.7.

### **Favourable and unfavourable impressions**

The most favourable impressions are 'the people' (81%) and 'hospitality' (75%).

Most people (68%) did not have any unfavourable impression with the only significant unfavourable impression as 'too expensive' (7%).

'Food' was given as a favourable impression by seven percent (7%) of visitors and an unfavourable impression by three percent (3%) of visitors.

### **Average length of stay**

The average length of stay was 8.2 nights making a total of 5,695,434 visitor nights.

The shortest average length of stay is in Denarau (7.2 nights) and the longest average length of stay is in the Sun Coast (15.6 nights).

### **Room density**

Average room density is 2.0 people. This has the most variation by 'main reason for visit', with 'holiday/vacation' having a room density of 2.1 people and 'business' a room density of 1.2 people.

### **Travelling group**

The most common travelling group is 'couple, partners, husband and wife' (44%) followed by 'self only' (21%), 'parent/s with children' (20%) and 'friends' (8%).

### **Gender**

Gender has a slight skew to women (54%) over men (46%).

### **Age of visitors**

The largest group of visitors are in the age range of 20 to 29 years (22%) with a slight decrease in percentage as age increases. Those 60 years and over are eleven percent (11%) of visitors.

Children under 13 years are also eleven percent (11%) of visitors. Teenage visitors are the lowest group of visitors; six percent (6%) and are aged between 13 to 19 years.

#### **Method of booking accommodation**

The primary method of booking a hotel is through a travel agent (53%) but many (40%) book direct with the hotel through phone calls, email or online.

#### **Satisfaction with accommodation**

Satisfaction with accommodation is high for 'courtesy of staff' (81%), 'cleanliness of rooms' (74%), 'accommodation facilities in general' (71%), 'efficiency of staff' (70%), 'value for money' (65%) and 'quality of food' (56%).

#### **Activities**

Key activities for visitors are:

- Swimming - fresh water (62%)
- Swimming - salt water (60%)
- Laying on poolside (58%)
- Snorkelling (51%)
- Laying on beach (45%)
- Shopping (39%)
- Beach walking (35%)
- Massage/spa (33%)
- Kava drinking/ceremony (27%)
- Canoeing/kayaking (22%)
- Village visit/tour (16%)
- Walking (13%)
- Scuba Diving (9%)

### **Retail purchases**

Eighty-two percent (82%) made retail purchases in Fiji. High satisfaction was:

- Presentation of shops (52%)
- Attitude of shopkeepers (51%)
- Range of products and brands (35%)
- Value for money (32%)

Items most commonly purchased were:

- Other Souvenirs (37%)
- Clothing (20%)
- Foodstuffs (13%)
- Alcohol (9%)
- Locally made handicrafts (6%)
- Jewellery (4%)

### **Public transport**

Forty-nine percent (49%) of visitors used public transport while in Fiji. Of this group eighty percent (80%) used taxis and forty-one percent (41%) used a bus.

### **Organized road tours and cruises in Fiji**

Twenty-seven percent (27%) of visitors took an organised cruise while ten percent (10%) took a tour.

Most cruises were in the Mamanuca tourism area (79%) and usually took a full day (89%).

Tours by road transport were likely to be in Coral Coast (56%) and Nadi (26%). These tours were likely to be 'sightseeing/scenic' (66%) or 'village/cultural' (24%).

## 3 APPROACH, METHODOLOGY AND SAMPLE

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### 3.1 Data collection

Data was collected by a paper-based survey in the departure lounge at Nadi International Airport with departing visitors. A visitor is defined as anyone who has stayed in Fiji for less than 12 months and is not a Fiji resident. Interviewing was carried out for all days of the year and covers all departing flights. Cruise visitors and international departures at Nausori International Airport are not included in this report.

### 3.2

#### Sample

The sample was chosen by a random selection approach. Validation with arrival data from visitors produced by Fiji Bureau of Statistics shows that this approach delivers the correct sample of visitors by country of origin and purpose of visit.

The IVS uses additional categories to those collected for purpose of visit therefore some are not directly comparable.

A sample size of 4,337 giving a confidence level of  $\pm 1.493\%$  at the 95% confidence interval.

### 3.3

#### Discrepancy in spend

Due to issues with data collection by paper there are varying base sizes in questions. All base sizes are noted in charts and tables so this is transparent.

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

In the case of Question 22 (number of people in visiting group), data was only recorded for 2,874 research participants of the 4,337 interviewed. This affects the spend data on accommodation in Fiji. Reviewing the data shows that findings for Total Spend is accurate. There are issues with the spend in accommodation when analysed by Province, Tourism Area, Country of Residence, main reason for visiting and main reason for holiday/vacation. For this analysis treat the spend in Table 13: Estimated spend by category as indicative spend.

## **3.4 Analysis**

### **3.4.1 Confidence level**

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

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

Analysis is carried out by cross-tabulation. Key forms of analysis are by:

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

Classification by Province and Tourism Area depends on the location of the hotel. Those not using a paid accommodation cannot be classified.

To make analysis practical, Tourism Areas have been grouped into the areas in the table below. Due to small base sizes, we cannot show data for all of the above therefore has been condensed. For example, only n=6 visitors are in the sample for Tailevu.

#### Tourism Area grouping

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



### 3.4.2 Base sizes for analysis

**Table 1: Province (condensed)**

	%	n
NET	100	3648
Ba	58	2103
Nadroga/Navosa	49	1781
Rewa	5	183
Serua	3	117
Cakaudrove	3	102
Other Provinces	2	90
Unspecified	5	185

**Table 2: Tourism Area (condensed)**

	%	n
NET	100	3648
Denarau	35	1263
Coral Coast	27	996
Nadi	24	869
Mamanuca	20	737
Yasawa	8	290
Suva	5	186
Pacific Harbour/Beqa/Kadavu	4	141
Lautoka	4	156
Vanua Levu	3	102
Suncoast	1	43
Outer Islands	0	13
Unspecified	5	178

**Table 3: Country and region of residence**

	%	n
NET	100	4296
Australia	52	2220
New Zealand	16	684
Pacific Islands	10	441
USA	7	317
Continental Europe	6	253
United Kingdom	4	160
Canada	1	58
China	1	52
Japan	1	42
Other areas	2	81

**Table 4: Main reason for visit**

	%	n
NET	100	4171
Holiday/vacation	79	3278
Transit	11	439
Business	4	170
Visit friends/relatives	3	115
Conference/convention	2	87
Education/training	1	46
Volunteer	0	14
Sport	0	11
Church	0	7
Other	0	14

**Table 5: Main reason for holiday/vacation**

	%	n
NET	100	3264
Rest and relaxation	85	2788
Honeymoon	7	225
Wedding	6	201
Scuba diving	1	21
Wedding anniversary	0	15
Surfing	0	8
Fiji culture	0	7
Sport	0	7
Transit short stay	0	5
Golf	0	2
Other	0	14

### 3.4.3 FBOS data for comparison

The arrival statistics produced by Fiji Bureau of Statistics for 2014 use slightly different categories but are similar to the IVS findings. The difference in some categories means that it may not be possible to make a direct comparison, but overall the IVS and FBOS data are in close alignment which shows that the IVS data is robust and reliable.

**Table 6: Comparison of percentage of visitors by country/region FBOS v IVS**

	FBOS %	IVS %
Australia	50	52
New Zealand	18	16
USA	9	7
Canada	2	1
United Kingdom	2	4
Continental Europe	4	6
Japan	1	1
South Korea	1	—
China	4	1
India	0	—
Hong Kong	0	—
Rest of Asia	1	—
Pacific Islands	6	10
Other	1	2

Differences in data collation for FBOS are:

- More countries and regions are included
  - India
  - Rest of Asia
  - South Korea
- China is divided into Hong Kong and China (mainland).

**Table 7: FBOS 2014 Main reason for visiting Fiji**

Reason	%
Holiday	79
Other reasons	9
Visiting friends and relatives	7
Business	3
Official conference	2
Education/training	1

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

- Transit passengers who do not leave Nadi International Airport do not complete an arrival card so are not included in these figures.
- The category of “official conference” is used
  - IVS uses “conference/convention”
- The category of “holiday” is used
  - IVS uses “holiday/vacation”
- IVS includes categories shown in FBOS as “other” such as:
  - Volunteer
  - Sport
  - Church

#### **3.4.4 Differences in base sizes**

All charts and tables include base sizes which vary in the report according to the questions answered. In other cases this is due to questions that have been missed on the paper surveys at data collection. This is being addressed by using electronic recording of data.

#### **3.4.5 Rounding error**

In some cases in the report percentages do not add to one hundred percent (100%) due to rounding error. To make comprehension easy percentages are shown without decimal points and thus shown to the nearest whole number. For example 99.4% will be shown as 99% while 99.6% will be shown as 100%.

## 4 VISITING FIJI

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This section includes questions on:

- Tourism Areas and Provinces visited
- Visitors and transit passengers
- Reasons for visiting Fiji
- Main reason for choosing Fiji for a holiday
- Number of backpackers
- Whether Fiji is the main destination
- Previous and first time visits to Fiji
- Expectations of the visit to Fiji
- Length of stay in Fiji
- Recommendation of Fiji as a place to visit
- Impressions of Fiji
- Room density



For seventy-nine percent (79%) of people travelling to Fiji, the purpose of their visit is for a 'holiday/vacation'. While most give 'rest and relaxation' as their main reason for choosing a Fijian holiday, there are strong niche markets including 'weddings' (6%) and 'honeymoon' (7%).

Backpackers continue to be an important market as they make up six percent (6%) of visitors to Fiji. Those backpacking predominantly come from Continental Europe (25%) and the United Kingdom (30%).

Forty-two percent (42%) of visitors have previously been to Fiji. The greatest proportion of repeat visits comes from the Pacific Islands (78%), as well as New Zealand (59%) and Australia (42%). Repeat visitors from Pacific Islands can be expected due to family relationships, work, education and other reasons related to close proximity to Fiji. Many of these are recreational visits which indicate that the 'Fijian experience' is powerful in attracting repeat visitors. This is supported by the seventy-six percent (76 %) of first time visitors who found their experience of Fiji to be more enjoyable and much more enjoyable than they expected.

The average length of stay was 8.2 nights (median of 7 nights).

## 4.1 Areas Visited

This report uses Tourism Areas and Provinces in analysis. Visitors make on average 1.25 visits to Provinces and 1.36 visits to Tourism Areas.

Visits to areas have been treated in two ways in this report. For questions that do not relate to spend, multiple visits are included in the data so that the correct profile for each area is shown. For questions where spend is recorded, the location of paid accommodation is used so that the correct total of spend is shown.

**Table 8: Q32 Tourism Areas visited**

**Base: 3,648**

Tourism area	%
Denarau	35
Coral Coast	27
Nadi	24
Mamanuca Islands	20
Yasawa Islands	8
Suva	5
Lautoka/Islands of Lautoka	4
Deuba/Pacific Harbour	3
Taveuni/Islands off Taveuni	2
Savusavu/Islands off Savusavu	1
Rakiraki/Islands off Rakiraki	1
Beqa	1
Lomaiviti	0
Nausori/Tailevu	0
Kadavu	0
Labasa/Islands off Labasa	0
Levuka	0
Ba/Tavua	0
Lau	0
Rented House / Apartment	1
Stayed with Friends / Relatives	3
Unspecified	1

In this analysis visitors may have stayed in more than one Tourism Area.

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

- Denarau (35%)
- Coral Coast (27%)
- Nadi (24%)
- Mamanuca Islands (20%)
- Yasawa Islands (8%)

Other Tourism Areas had five percent (5%) or fewer visitors. Five percent (5%) of visitors could not be identified as staying in a Tourism Area as these are mostly visitors who stayed in non-paid accommodation or rented a house/apartment and did not specify the area in which they stayed in.

**Table 9: Q32 Provinces visited**

**Base: 3,648**

	%
NET	100
Ba	58
Nadroga/Navosa	49
Rewa	5
Serua	3
Cakaudrove	3
Other Provinces	2
Unspecified	5

In this analysis visitors may have stayed in more than one Province. The Province of Ba accounts for fifty-eight percent (58%) of visitors and Nadroga/Navosa a further forty-nine percent (49%) of visitors.





## 4.2 Visitors and transit passengers

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As is standard in all IVS reporting, both departing visitors and transit passengers are interviewed as part of the research. Transit passengers also contribute to Fiji's economy by purchases made at the Nadi International Airport.

There are two types of transit visitors:

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

Visitors can also come to transit to other countries and spend a night in Fiji while waiting for an airline connection on a different day of arrival.

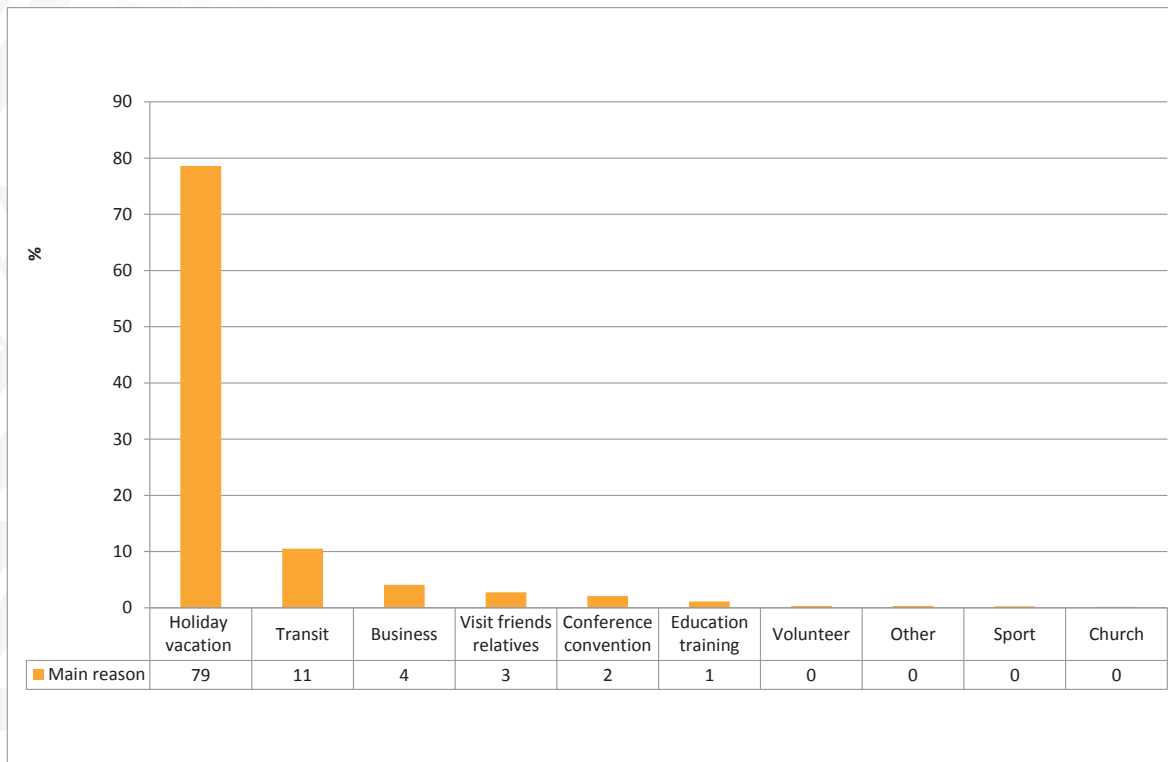
In the 2014 IVS, eighty-nine percent (89%) of interviewee's were visitors and eleven percent (11%) were transit passengers.

### 4.3 Reasons for visiting Fiji

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

**Chart 1: Q13 Main reason for visiting Fiji**

**Base: 4,171**



Base: All visitors

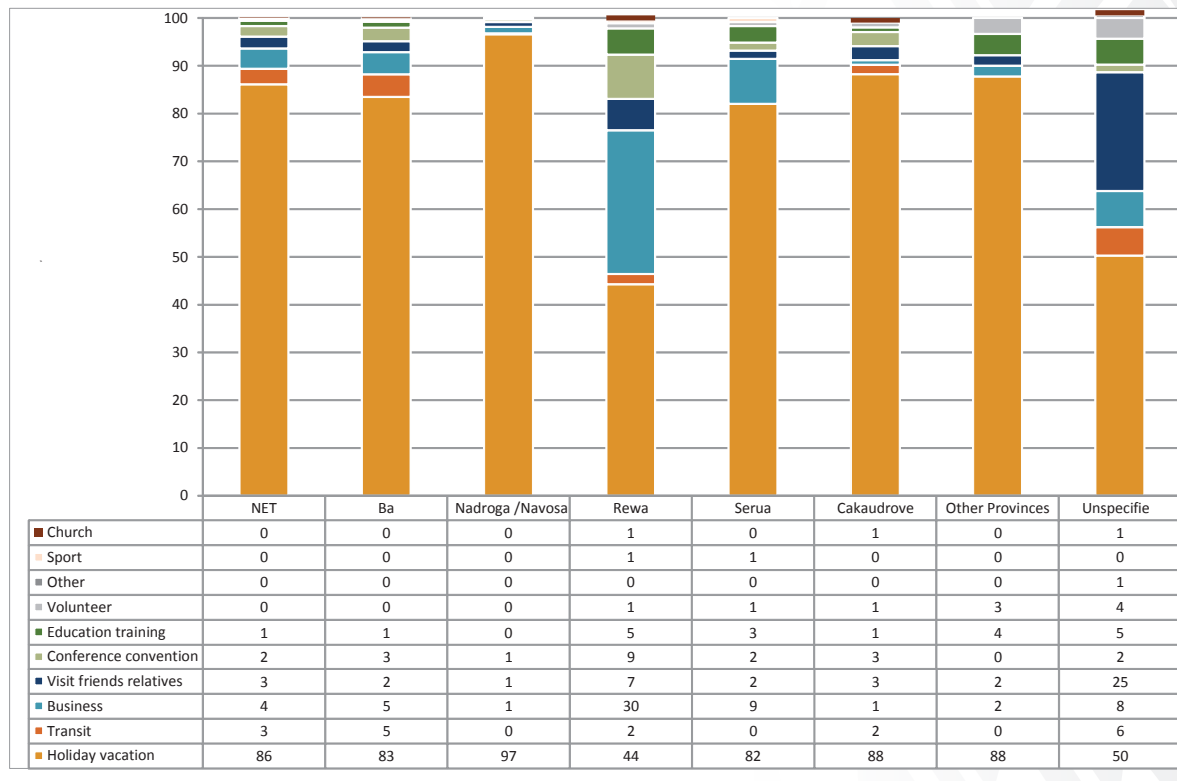
The primary ‘main reason’ for visiting Fiji is ‘holiday/vacation’ with seventy-nine percent (79%) of visitors. The remaining twenty-one percent (21%) of visitors come for a range of reasons which includes;

- Transit passengers (11%)
- Business (4%)
- Visiting friends and relatives (3%)
- Conference/convention (2%)
- Education/training (1%)

Other reasons for visiting Fiji are less than one percent (1%).

Chart 2: Q13 Main reason for visiting Fiji by Province

Base: 3,635



Base: All visitors

‘Holiday/vacation’ is the primary reason for visits to all Provinces.

The Province of Rewa in particular has a range of other reasons for visiting. These include:

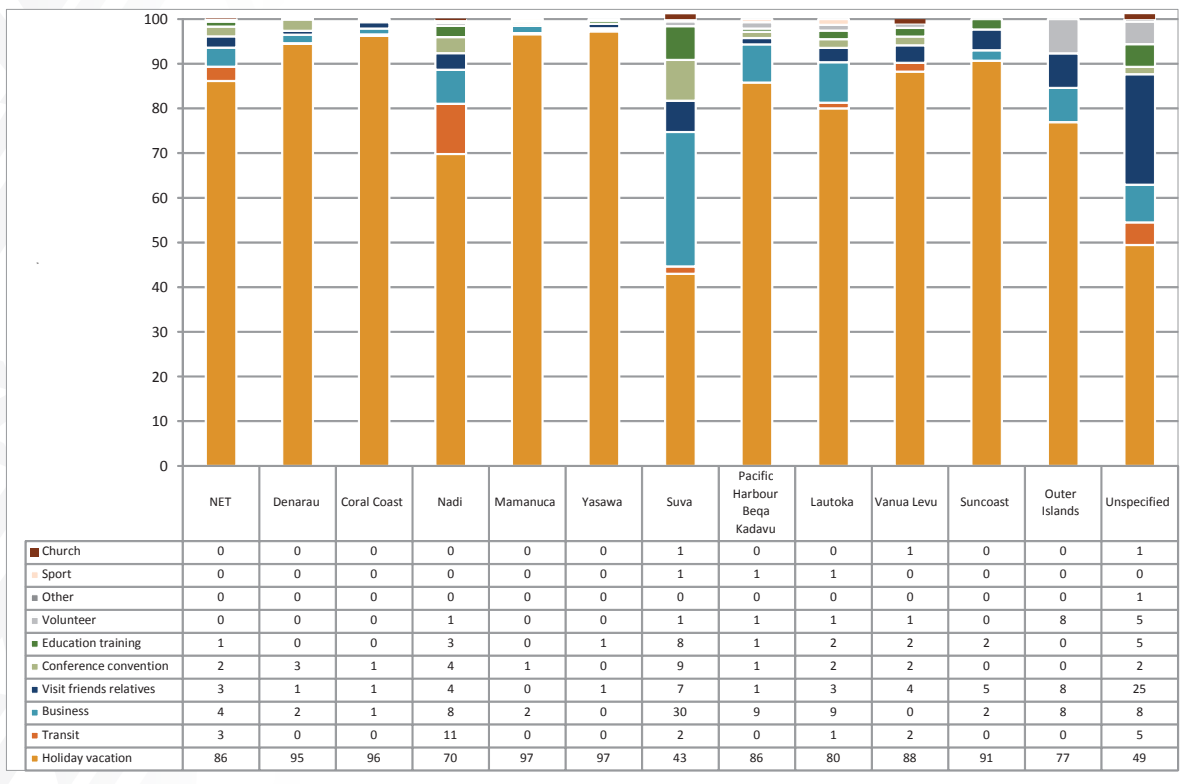
- Business (30%)
- Conference/convention (9%)
- Visiting friends and relatives (7%)
- Education/training (5%)

Serua records the second highest of ‘business’ visitors with nine percent (9%).



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

Base: 3,635



Base: All visitors

As with Provinces, the main reason for visiting in all areas is ‘holiday/vacation’.

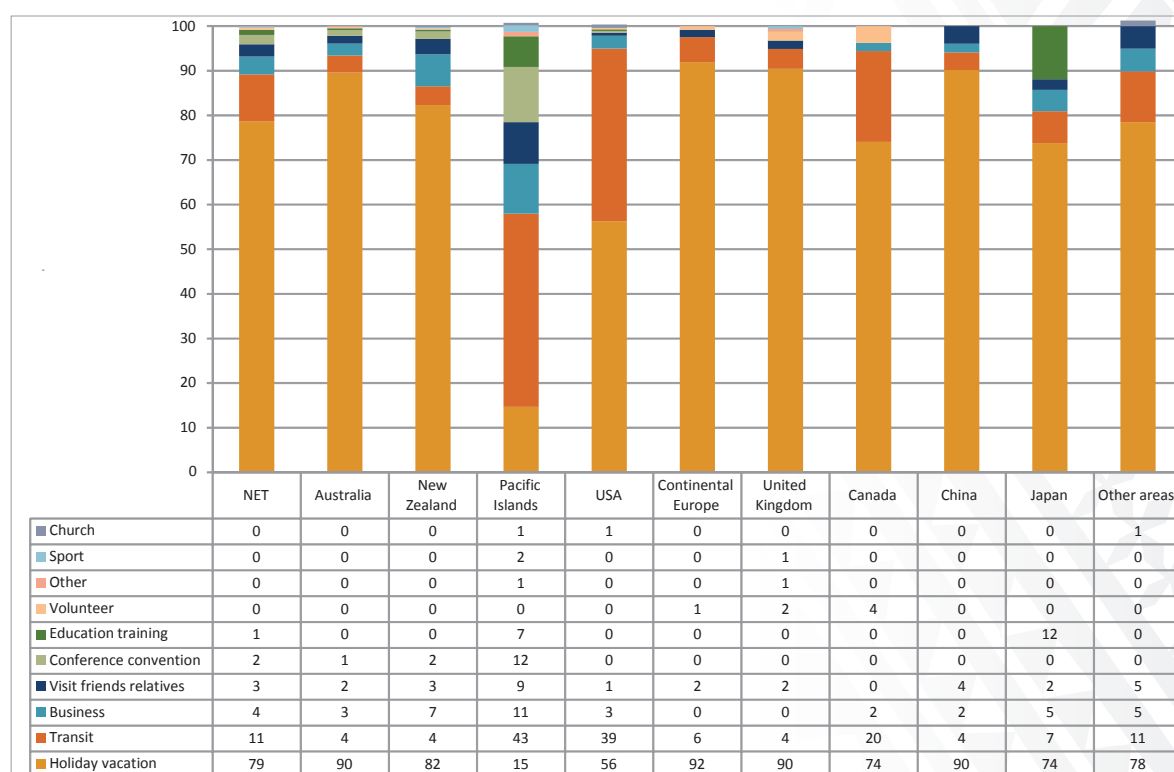
A range of reasons for visit were noted in the following Tourism Areas:

- Nadi
  - Transit (11%)
  - Business (8%)
  - Visiting friend and relatives (4%)
  - Conference/convention (4%)
  - Education/training (3%)
  
- Suva
  - Business (30%)
  - Conference/convention (9%)
  - Education/training (8%)
  - Visiting friends and relatives (7%)



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

**Base: 3,635**



Base: All visitors

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

- Continental Europe (92%)
- Australia (90%)
- United Kingdom (90%)
- China (90%)
- New Zealand (82%)
- Japan (74%)
- Canada (74%)

Over half (56%) of visitors from USA came for 'holiday/vacation'. However, thirty-nine percent (39%) are in transit to other destinations.

Visitors from Pacific Islands came for a range of reasons including:

- Transit (43%)
- Conference/convention (12%)
- Business (11%)
- Education/training (7%)

## 4.4 Backpackers

Defining backpackers is an issue for all countries IVS reporting. Some countries define them according to their average expenditure while others by their type of accommodation. Both these definitions have issues; backpackers can spend surprising amounts on accommodation and are not necessarily always 'low cost' accommodation users. They can also stay in a mix of accommodation styles that include traditional backpacking properties, upscale 'glam-packing' and mainstream accommodation.

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

Six percent (6%) of all visitors are backpackers. In 2014 there were 41,557 backpackers.

**Chart 5: Q15 Backpackers by Province**

**Base: 3,351**



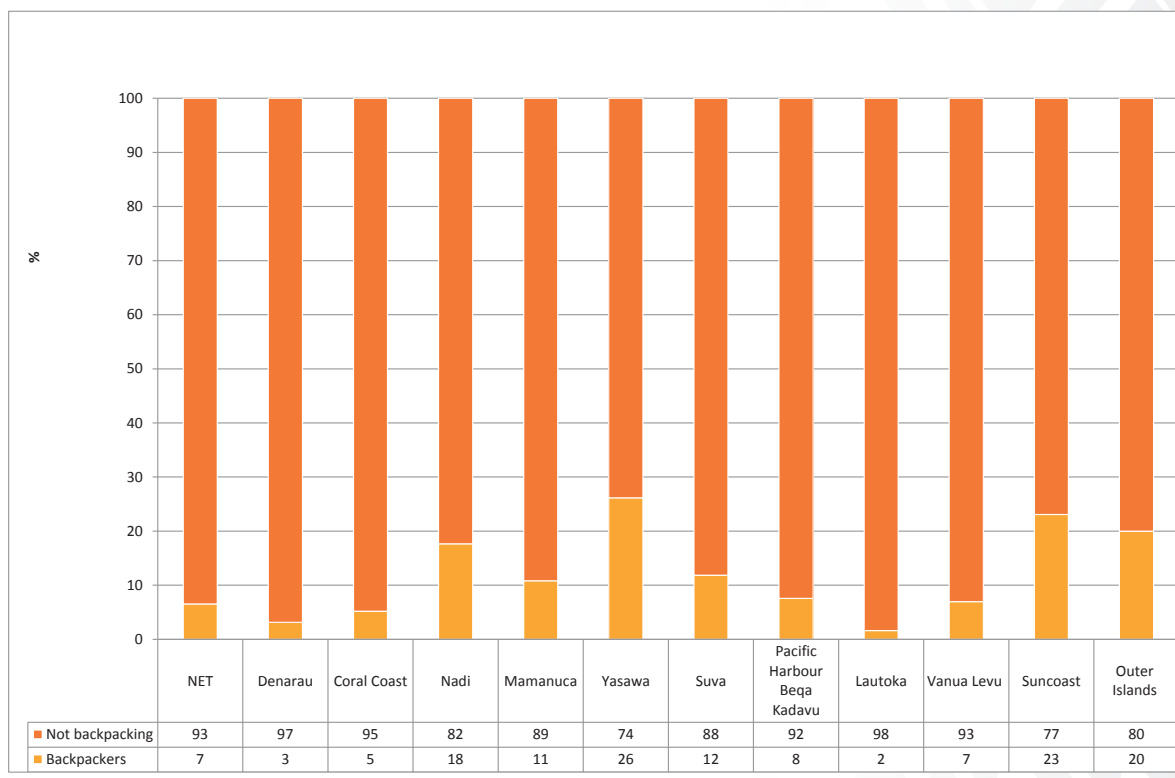
Base: All visitors

Backpackers are distributed throughout the Provinces and account for twenty-three percent (23%) of all visitors to Ra and twenty-two percent (22%) of all visitors to Lomaiviti.

Differences by other provinces are reported as not statistically significant.

Chart 6: Q15 Backpackers by Tourism Area

Base: 3,351



Base: All visitors

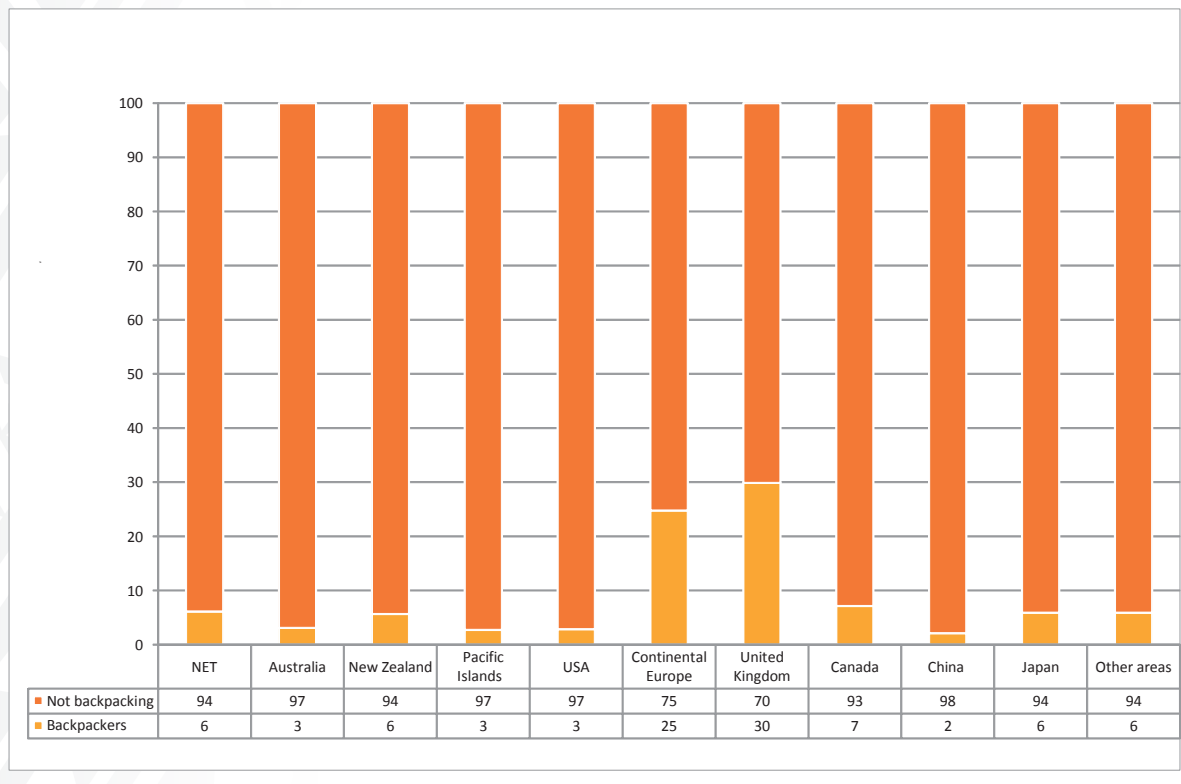
Backpacker visitors are higher for:

- Yasawa (26%)
- Suncoast (23%)
- Outer Islands (20%)
- Nadi (18%)
- Suva (12%)
- Mamanuca (11%)



Chart 7: Q15 Backpackers by country and region of residence

Base: 3,351



Base: All visitors

The key markets for backpackers are the United Kingdom (30%) and Continental Europe (25%). These are both long-haul visitor markets.



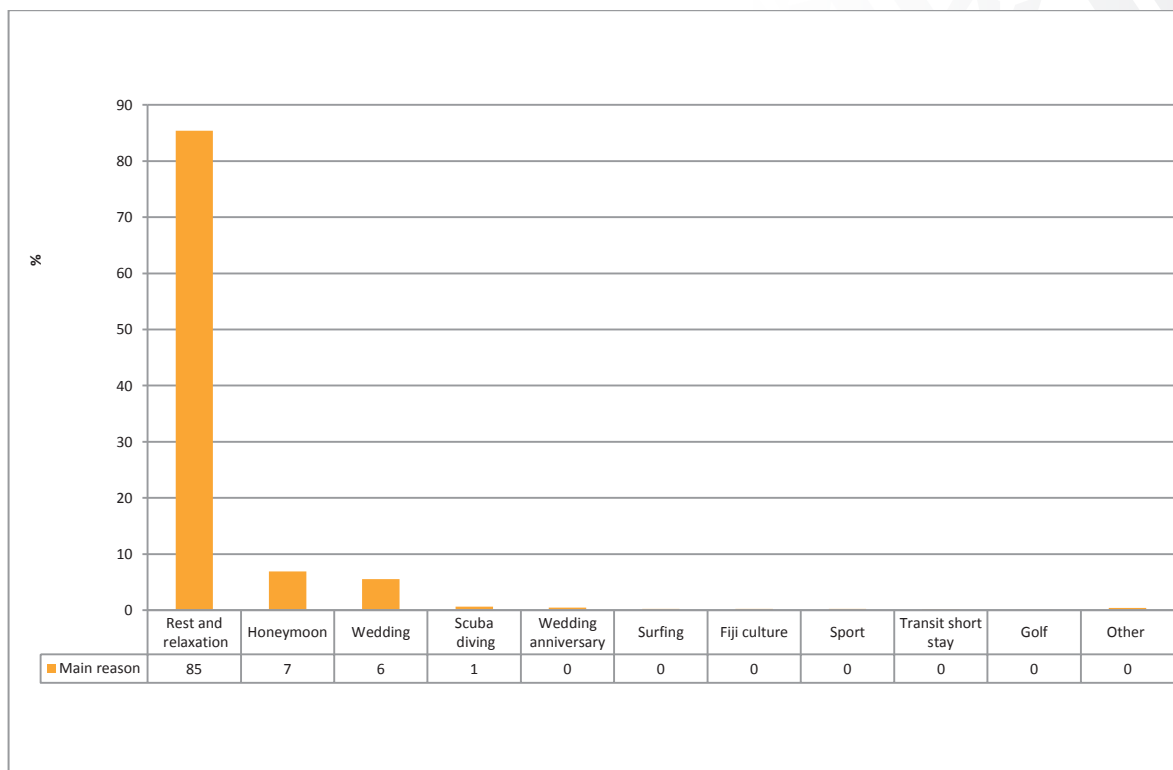
## 4.5 Main reason for visiting Fiji as a holiday/vacation destination

In understanding these findings, it is important to note that this question focuses on visitors who choose holiday/vacation as their 'main reason' for visit. This does not restrict other activities as part of a 'holiday/vacation'. For example of the eighty-five percent (85%) of 'rest and relaxation' visitors, eleven percent (11%) took part in scuba diving as part of their activities.

In 2014 there were 544,340 'holiday/vacation' visitors.

**Chart 8: Q14 Main reason for holiday/vacation**

**Base: 3,264**



Base: Holiday/vacation visitors

For the seventy-nine percent (79%) of visitors who visited Fiji for a 'holiday/vacation', the main reason is 'rest and relaxation' (85%).

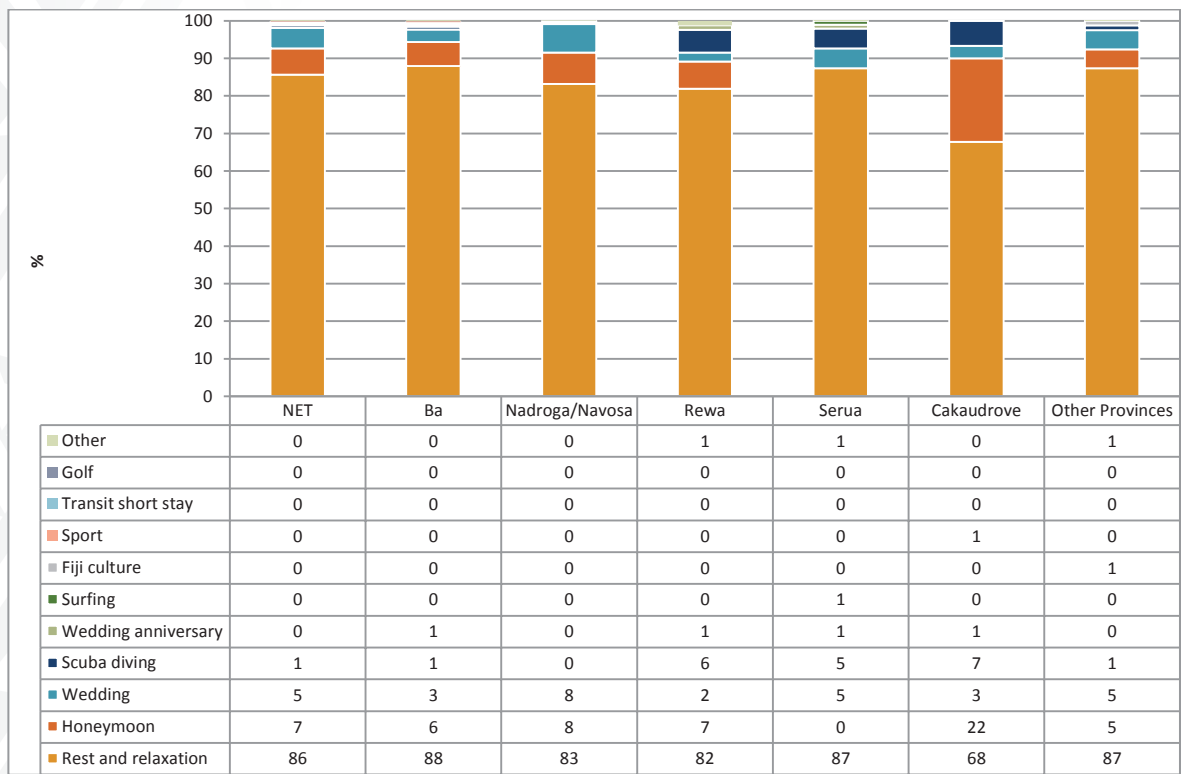
Key niche markets are:

- Honeymoon (7%)
- Wedding (6%)
- Scuba diving (1%)

Other reasons for visiting are less than half a percent and shown as zero percent (0%).

Chart 9: Q14 Main reason for a holiday/vacation by Province

Base: 3,113



Base: Holiday/vacation visitors

‘Rest and relaxation’ was the main reason for a ‘holiday/vacation’ for all Provinces.

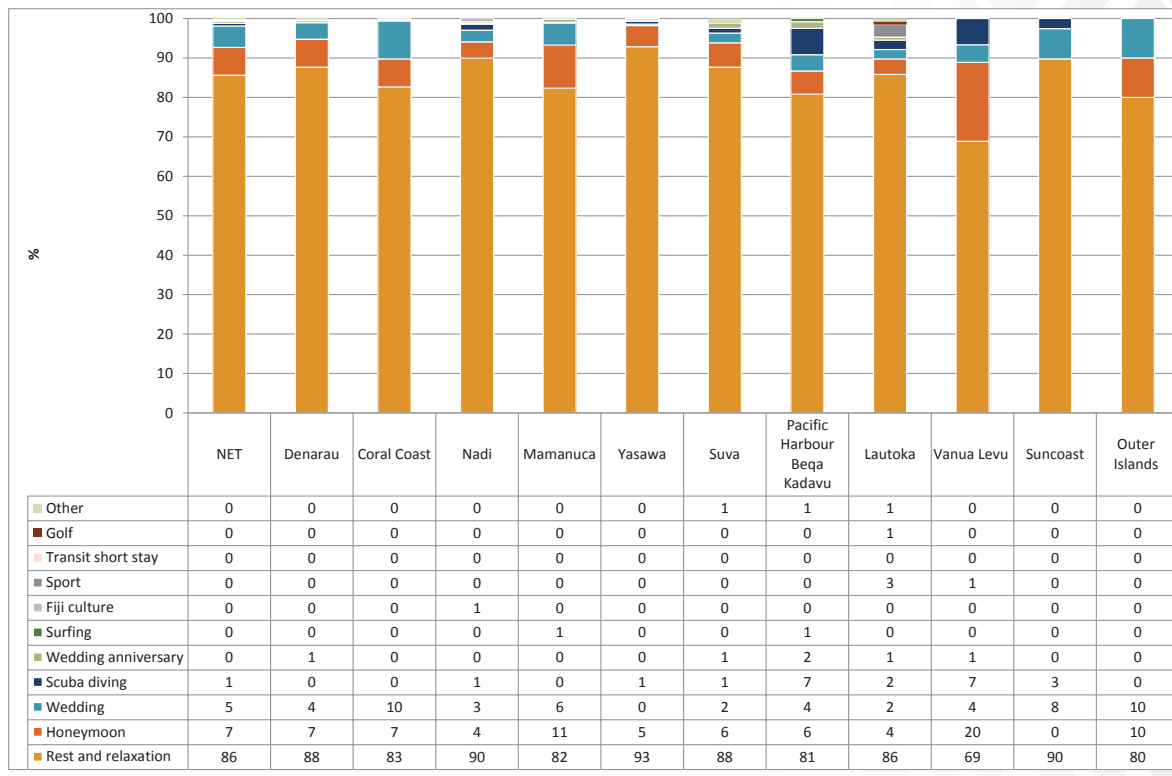
Key differences by Province are:

- Nadroga/Navosa
  - Honeymoon (8%)
  - Wedding (8%)
- Rewa
  - Scuba diving (6%)
- Serua
  - Scuba diving (5%)
- Cakaudrove
  - Honeymoon (22%)
  - Scuba diving (7%)



Chart 10: Q14 Main reason for holiday/vacation by Tourism Area

Base: 3,113



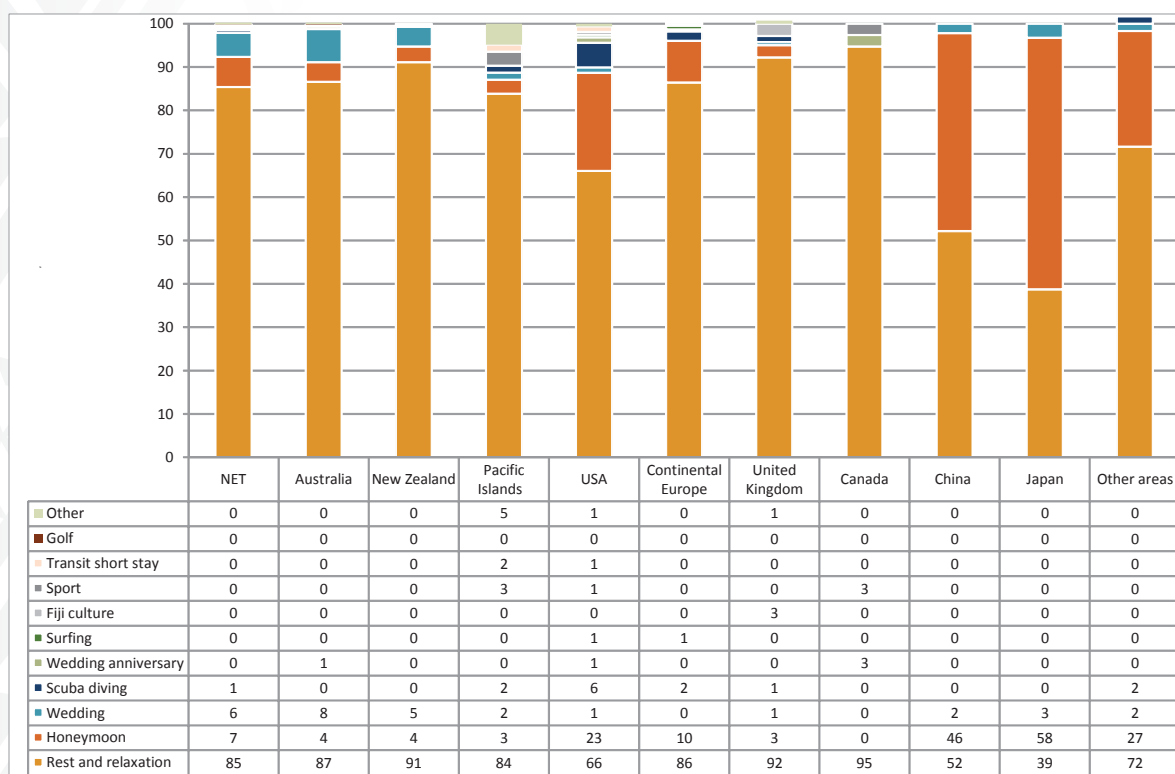
Base: Holiday/vacation visitors

As with Provinces, the main reason for visiting all Tourism Areas is 'holiday/vacation'.

Key differences by Tourism Area are:

- Coral Coast and Outer Islands
  - Wedding (10%)
- Mamanuca Islands
  - Honeymoon (11%)
- Pacific Harbour/Beqa/Kadavu
  - Scuba diving (7%)
- Vanua Levu
  - Honeymoon (20%)
  - Scuba diving (7%)

**Chart 11: Q14 Main reason for holiday/vacation by country and region of residence Base: 3,246**



Base: Holiday/vacation visitors

Key differences by country and region of residence are:

- Australia
  - Wedding (8%)
- Pacific Islands
  - Sport (3%)
- USA
  - Honeymoon (23%)
  - Scuba diving (6%)
- China
  - Honeymoon (46%)
- Japan
  - Honeymoon (58%)

'Rest and relaxation' was the main reason for a 'holiday/vacation' from all countries.

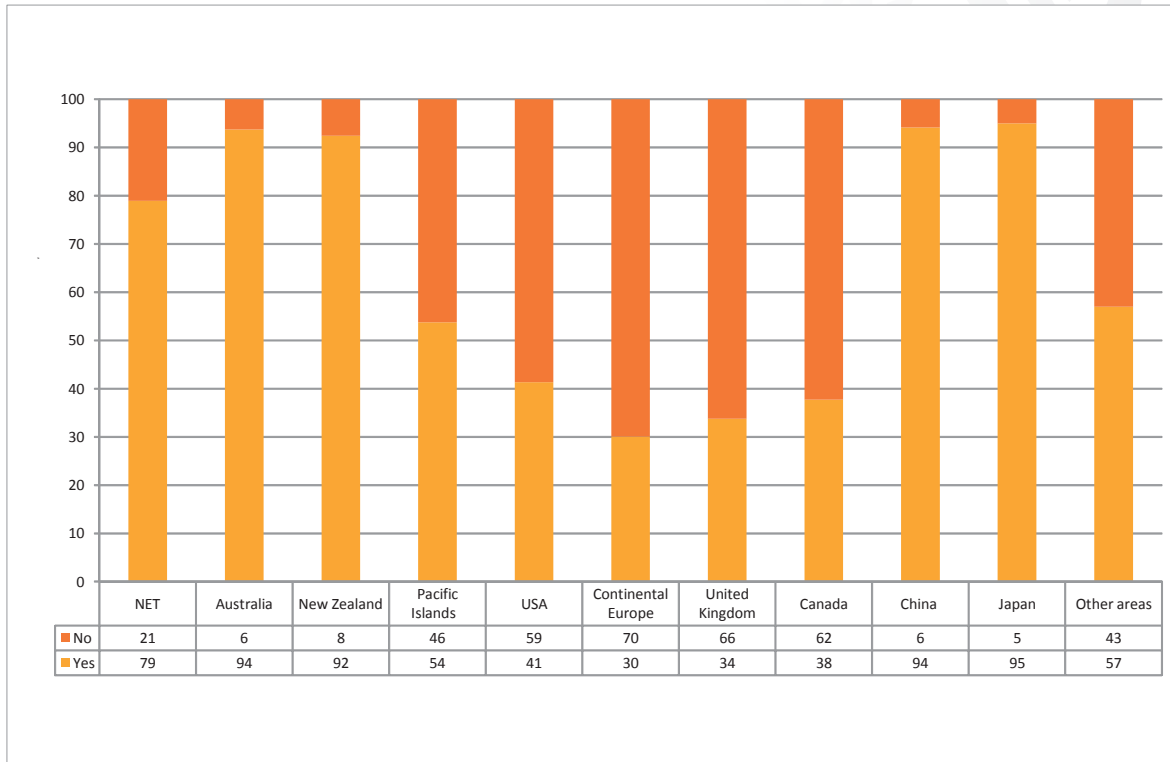


## 4.6 Whether Fiji is the main destination for visit

Fiji is the main destination for seventy-nine percent (79%) of visitors.

Chart 12: Q16 Is Fiji the main destination for this visit

Base: 4,065



Base: All visitors

Fiji is the main destination for visitors from:

- Japan (95%)
- Australia (94%)
- China (94%)
- New Zealand (92%)

The long-haul visitor countries are more likely to have other destinations as part of their travel. Fiji was not the main destination of visit for:

- Continental Europe (70%)
- United Kingdom (66%)
- Canada (62%)
- USA (59%)

## 4.7 Previous visits and first time visits to Fiji

Fifty-eight percent (58%) of visitors to Fiji are visiting for the first time while forty-two percent (42%) have visited previously.

**Chart 13: First time and previous visits by country and region of residence**

**Base: 3,793**



Base: All visitors

Residents of countries/region most likely to have made previous visits are:

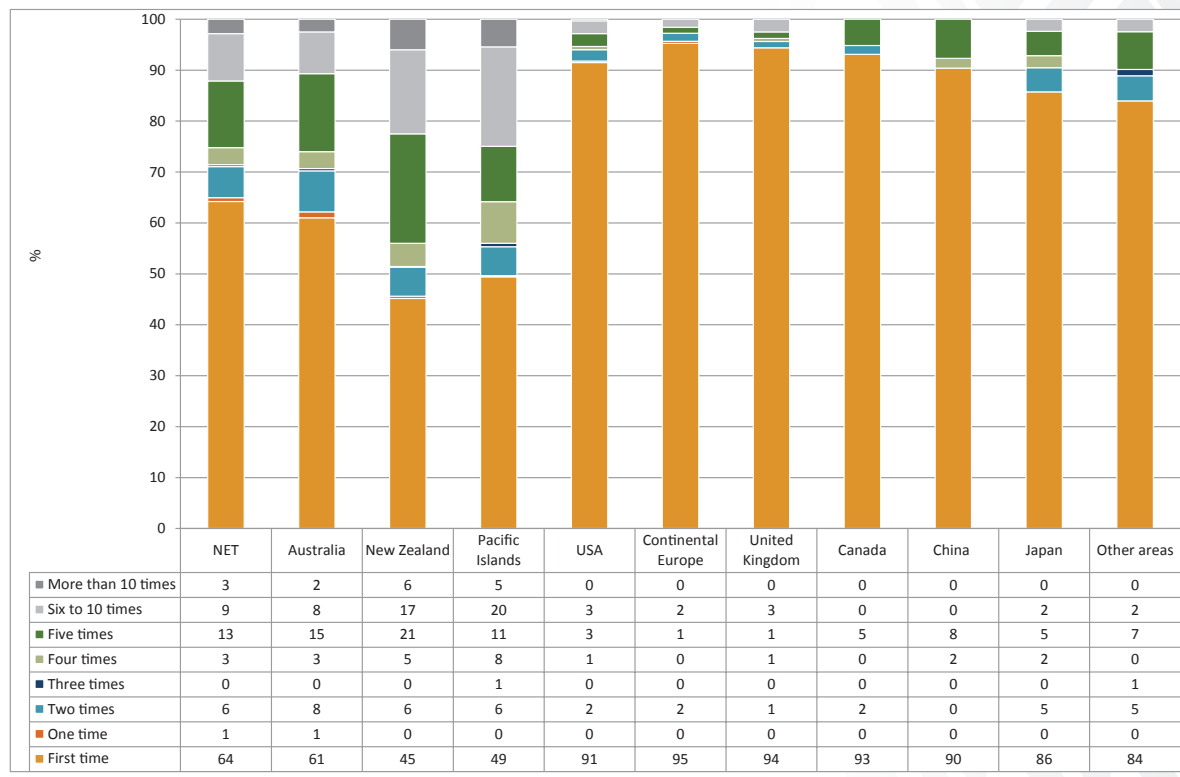
- Pacific Islands (78%)
- New Zealand (59%)
- Australia (42%)

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

- Continental Europe (95%)
- United Kingdom (93%)
- China (89%)
- Japan (85%)
- USA (84%)
- Canada (84%)

Chart 14: Q80 & Q82 Number of visits by country and region of residence

Base: 3,530



Base: All Visitors

The most frequent visitors are from New Zealand, with forty-four percent (44%) visiting five or more times.

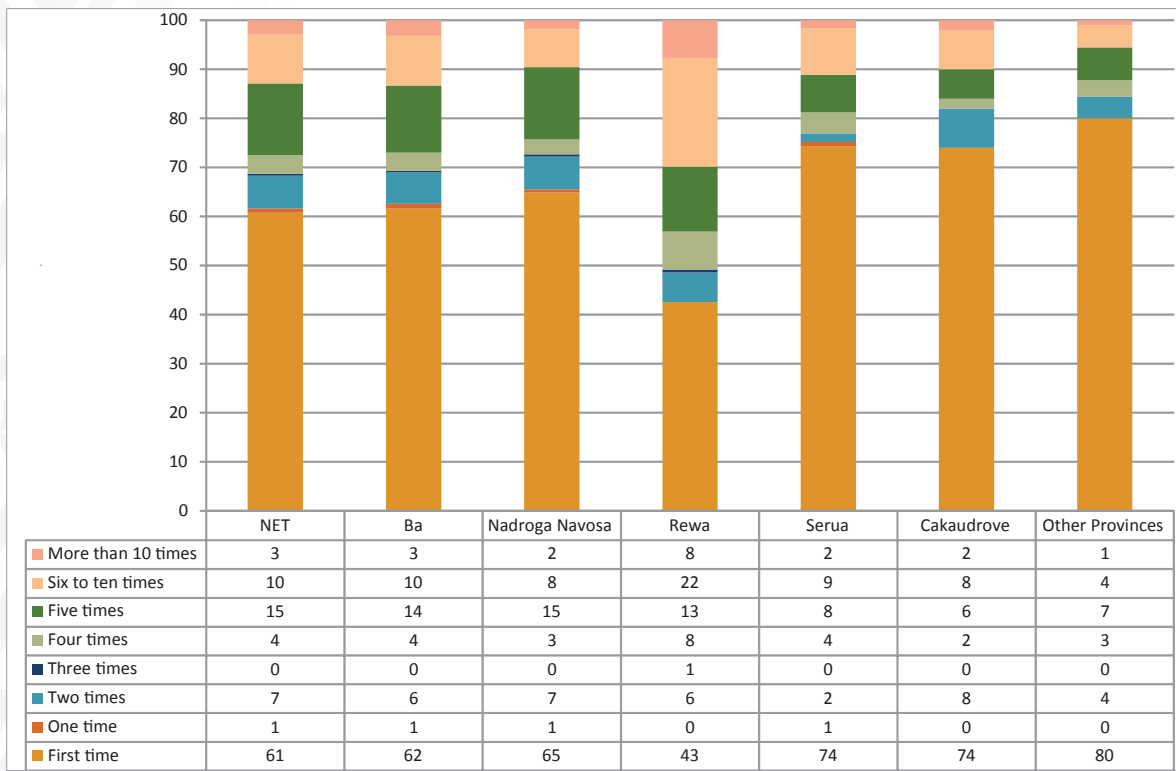
Other countries/regions who visited five or more times are:

- Pacific Islands (36%)
- Australia (25%)



Chart 15: Q80 & Q82 Number of visits to Fiji by Province

Base: 3,560



Base: All visitors

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

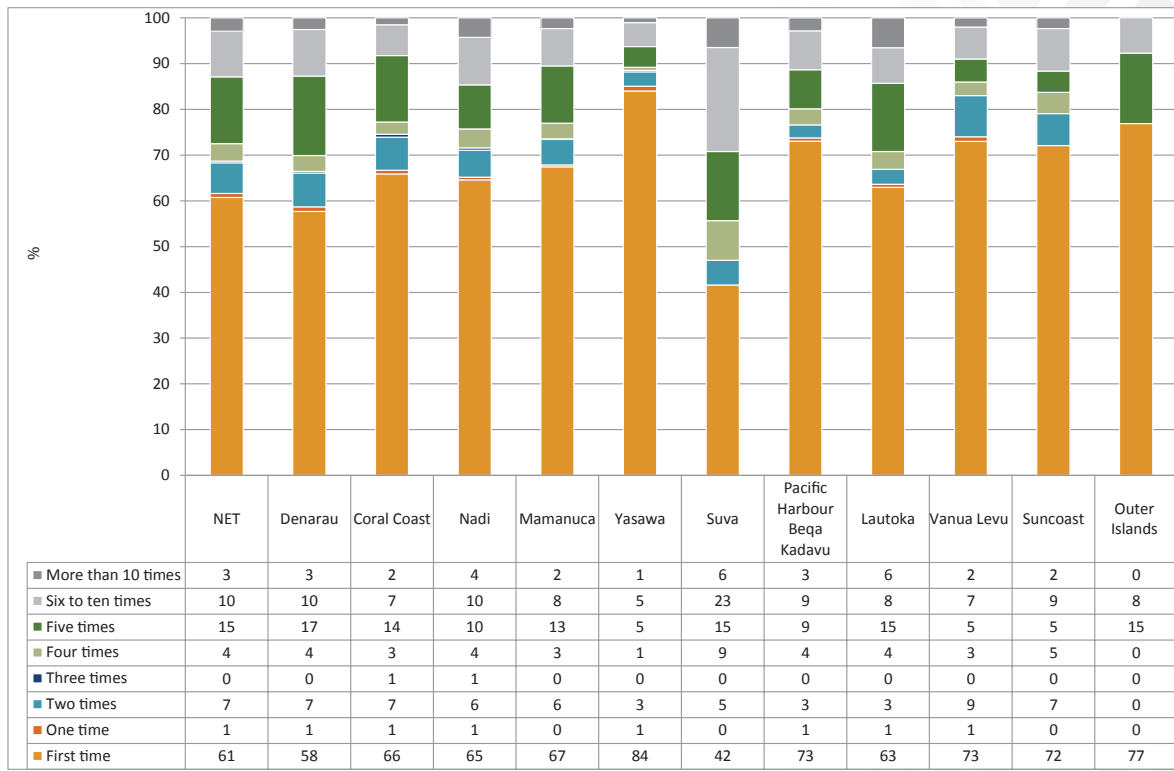
- Cakaudrove (74%)
- Serua (74%)
- Nadroga/Navosa (65%)

Previous visitors are more likely to make five or more visits to the Province of Rewa (43%).



Chart 16: Q80 & Q82 Number of visits by Tourism Area

Base: 3,560



Base: All visitors

First time visitors are more likely to visit:

- Yasawa (84%)
- Outer Islands (77%)
- Pacific Harbour/Beqa/Kadavu (73%)
- Vanua Levu (73%)

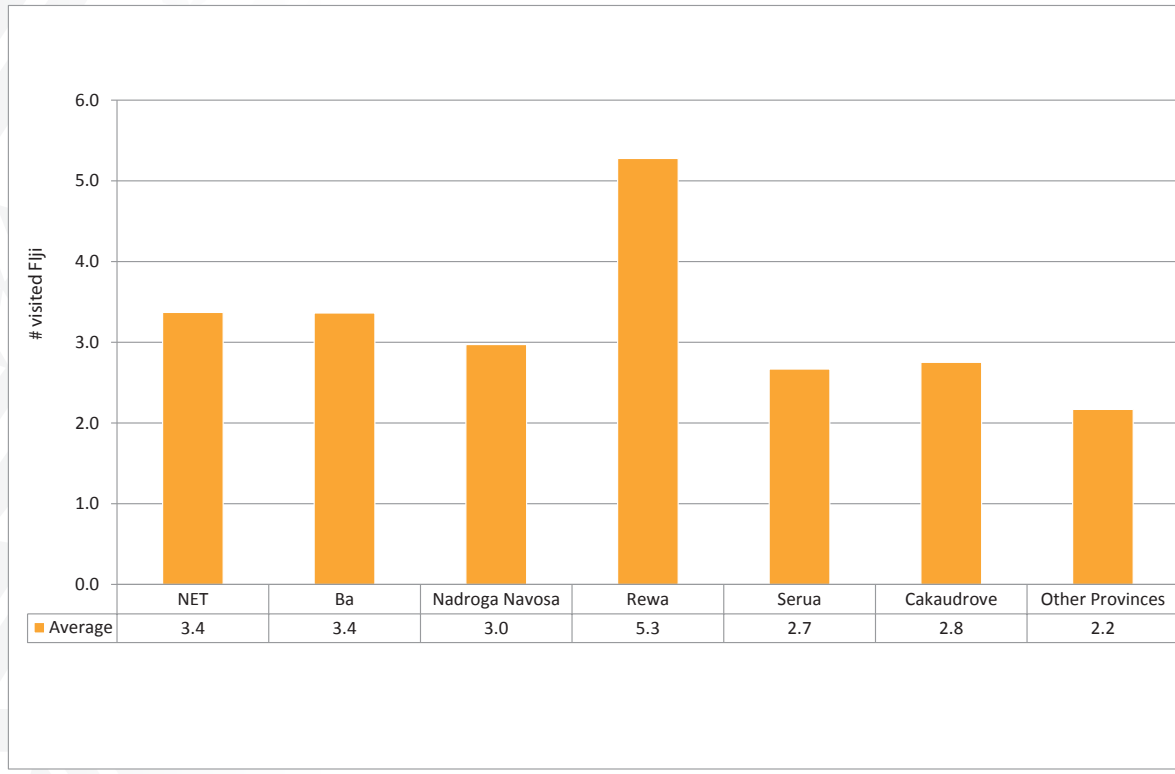
Previous visitors are more likely to make five or more visits to the Tourism Area of Suva (44%).

### Average visits

Average visits include combining Question 80 (first time visit or previous visits) and Q82 (number of previous visits). A first time visit = 1.

**Chart 17: Q80/82 Average visits by Province**

**Base: 3,905**

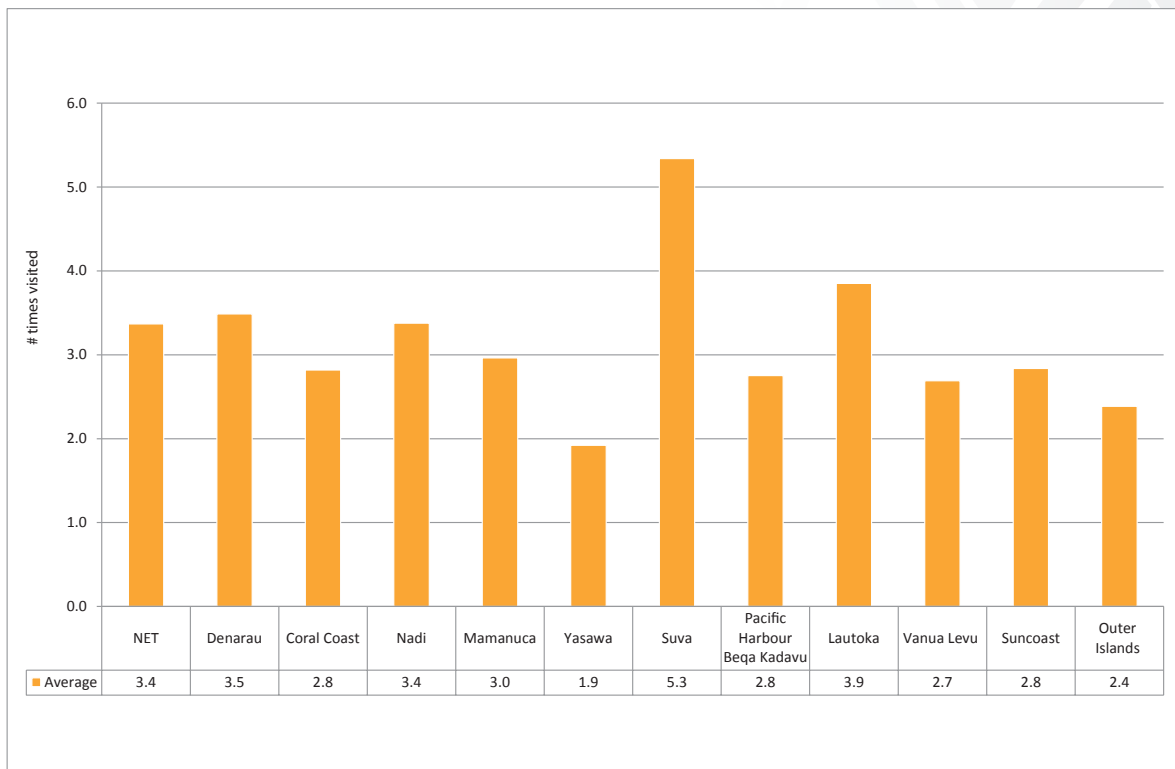


Base: All visitors

The average number of visits to Fiji is 3.4 visits. Most Provinces are close to the average with Rewa significantly higher with an average of 5.3 visits.

Chart 18: Q80/82 Average visits by Tourism Area

Base: 3,550



Base: All visitors

Average number of visits is higher for:

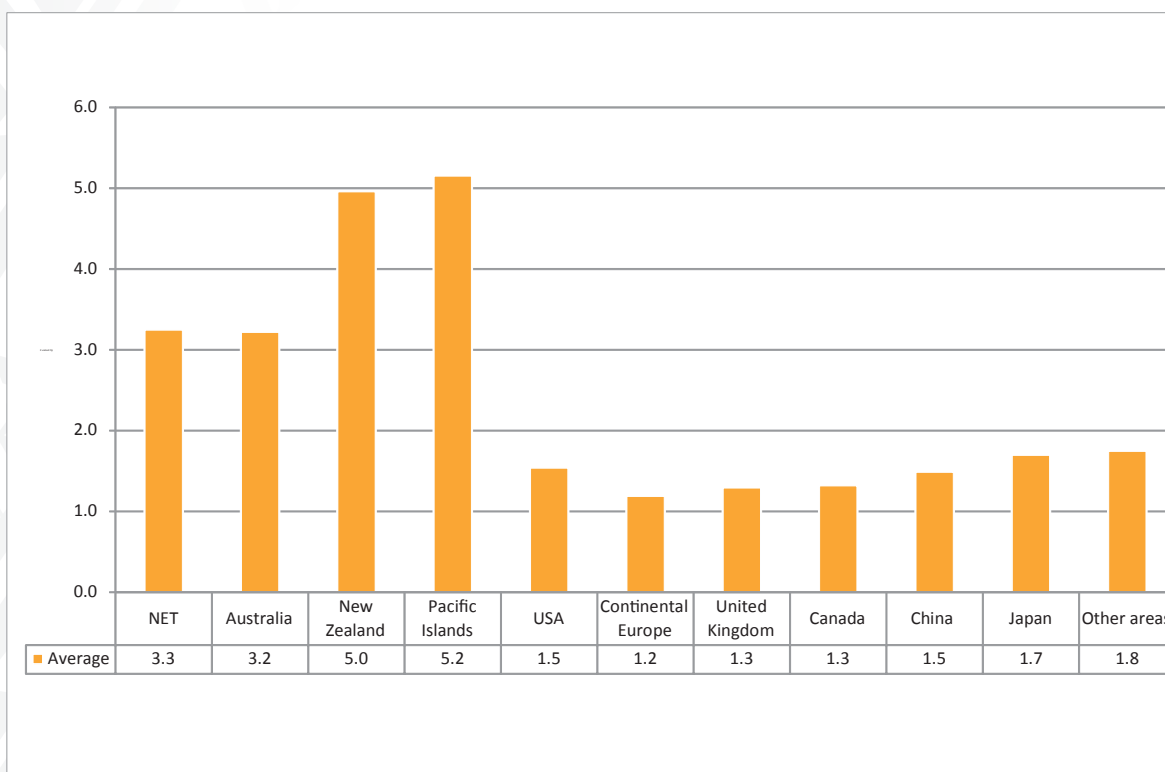
- Suva (5.3)
- Lautoka ( 3.9)
- Denarau (3.5)

Average number of visits is lower for:

- Yasawa (1.9)
- Outer Islands (2.4)
- Vanua Levu (2.7)

Chart 19: Q80/82 Average visits by country and region of residence

Base: 3,550



Base: All visitors

Average number of visits is higher for visitors from:

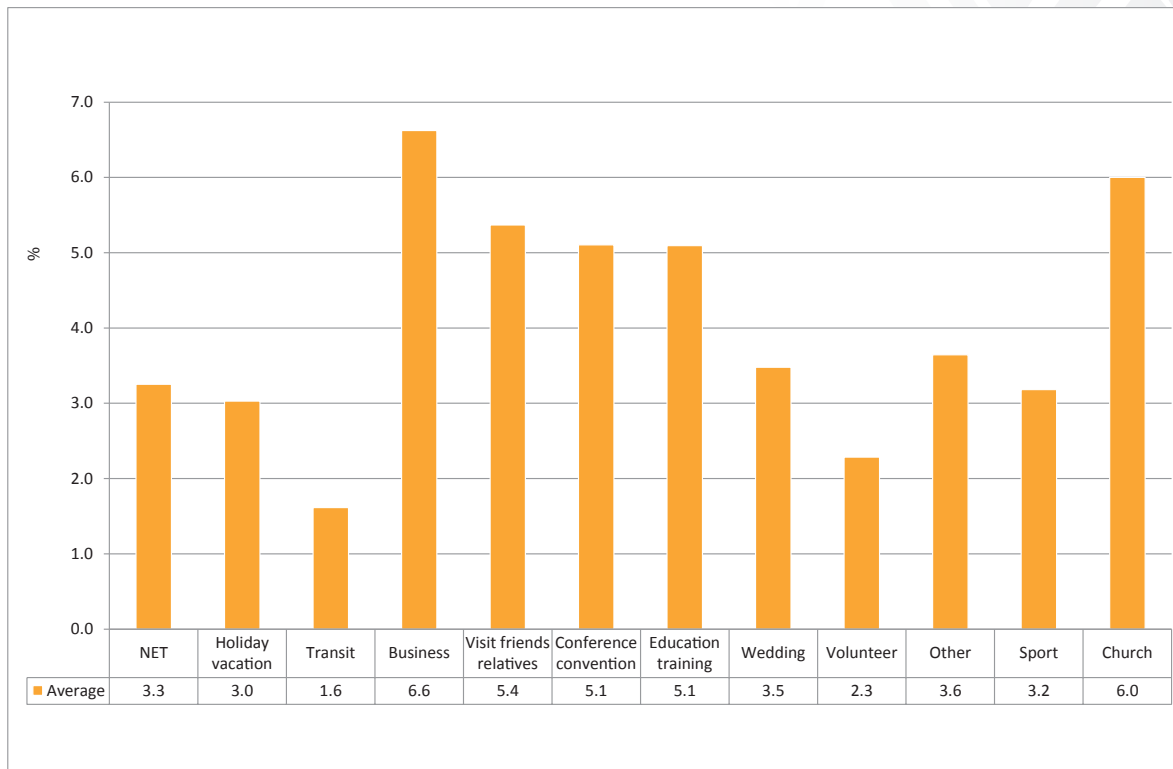
- Pacific Islands (5.2)
- New Zealand (5.0)
- Australia (3.2)

Average number of visits is lower for visitors from the other countries/region.



Chart 20: Q80/82 Average visits by main reason for travel

Base: 3,933



Base: All visitors

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

- Transit (1.6)
- Volunteer (2.3)
- Holiday/vacation (3.0)

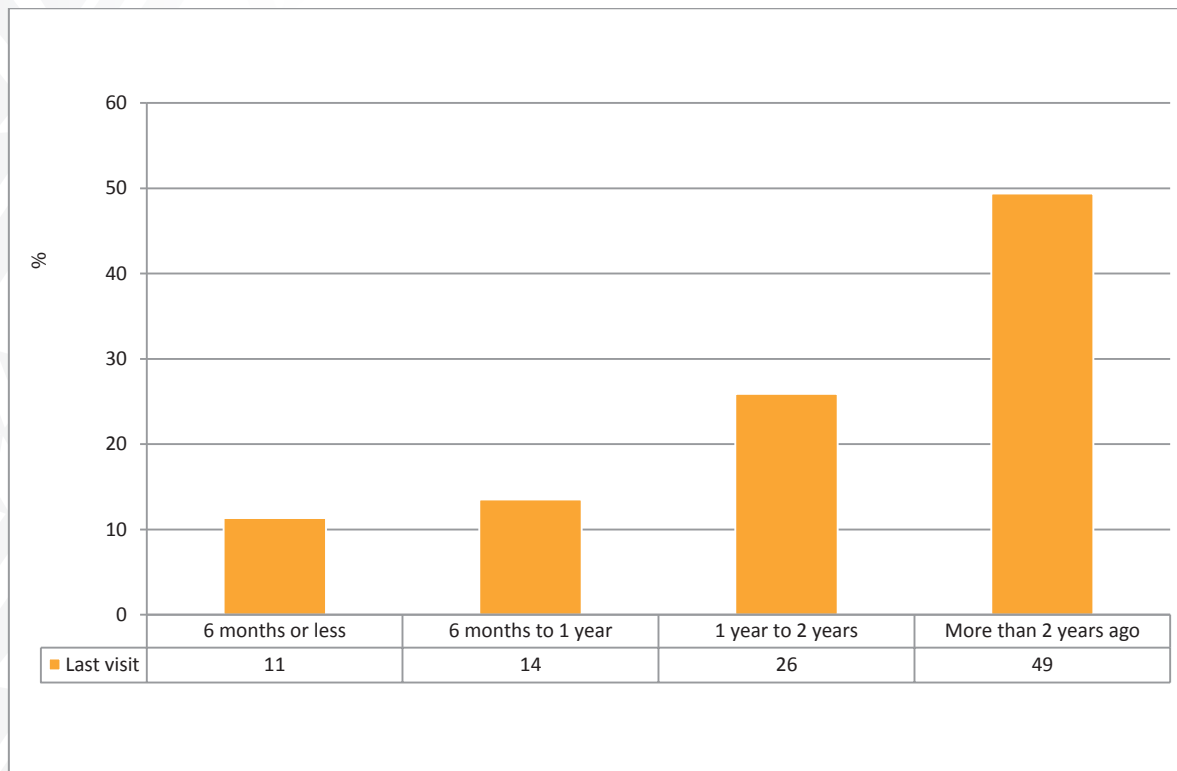
Those who visit Fiji for a wedding are more frequent visitors (3.5) than those coming for a holiday/vacation (3.0)

Average number of visits is higher for all other reasons. Visitors are most likely to have multiple visits to Fiji for:

- Business (6.6)
- Church (6.0)
- Visiting friends and relatives (5.4)
- Conference/convention (5.1)
- Education/training (5.1)

**Chart 21: Q83 How long ago was the last visit**

**Base: 1,559**



Base: Previous visitors

Fifty-one percent (51%) of previous visitors have been to Fiji in the last two years.

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

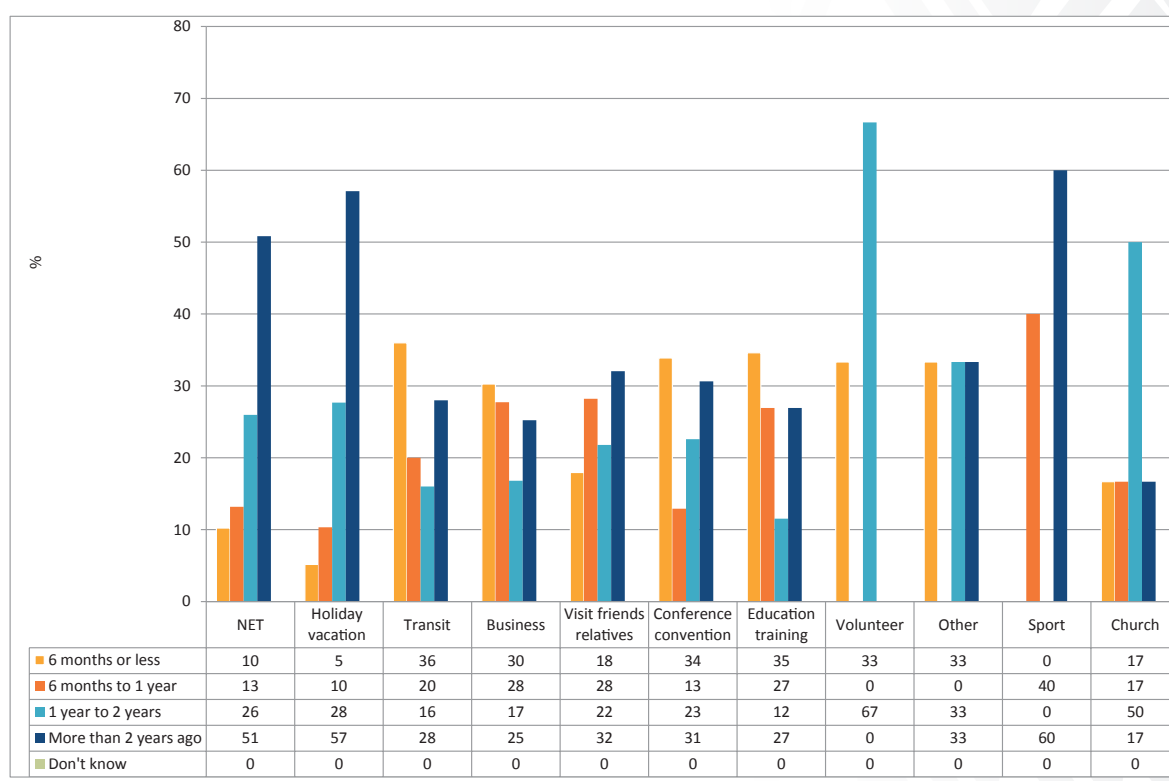
- Rewa (72%)
- Ba (54%)

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

- Suva (73%)
- Nadi (65%)

Chart 22: Q83 How long ago was the last visit by main reasons for visit

Base: 1,546



Base: Previous visits

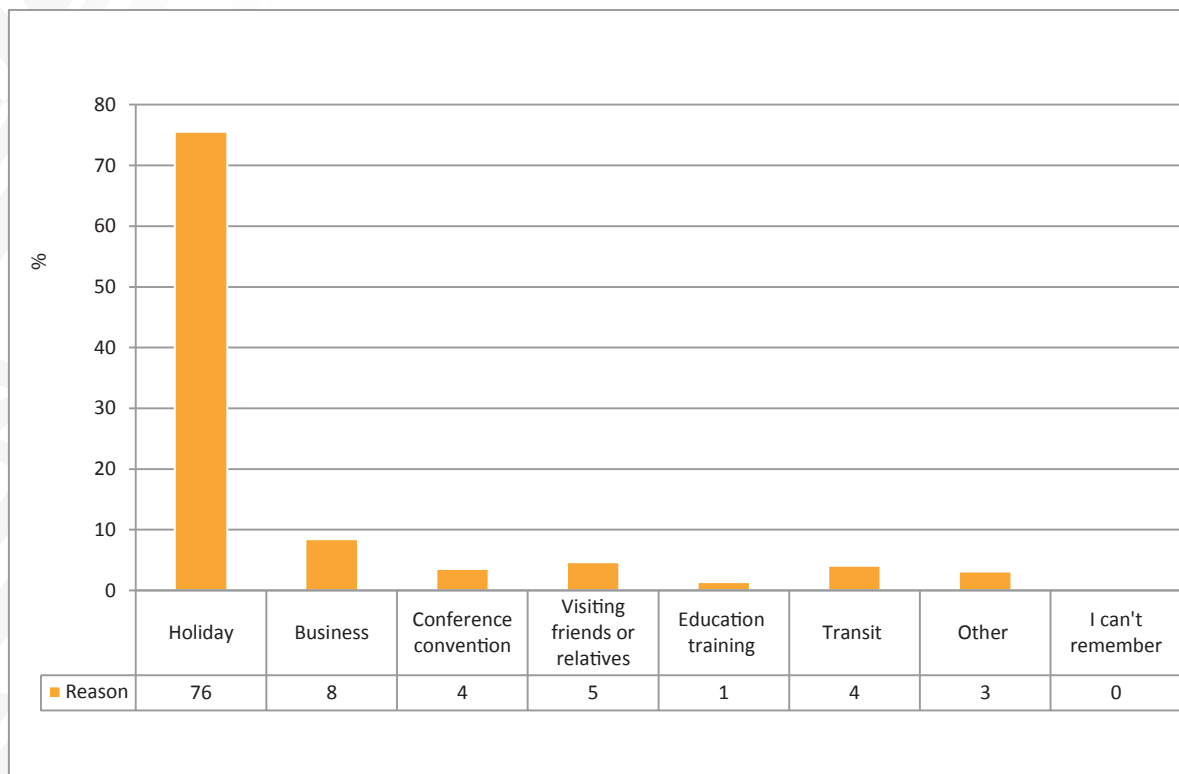
Those who have visited Fiji in the last two years are more likely to revisit for:

- Business (75%)
- Education/training (74%)
- Transit (72%)
- Conference/convention (70%)
- Visiting friends/relatives (68%)

Forty-three percent (43%) of visitors for 'holiday/vacation' have visited in the last two years.

Chart 23: Q84 Reason for last visit

Base: 1,471



Base: Previous visits

The main reason for last visit was 'holiday/vacation' (76%). Other reasons for last visit are:

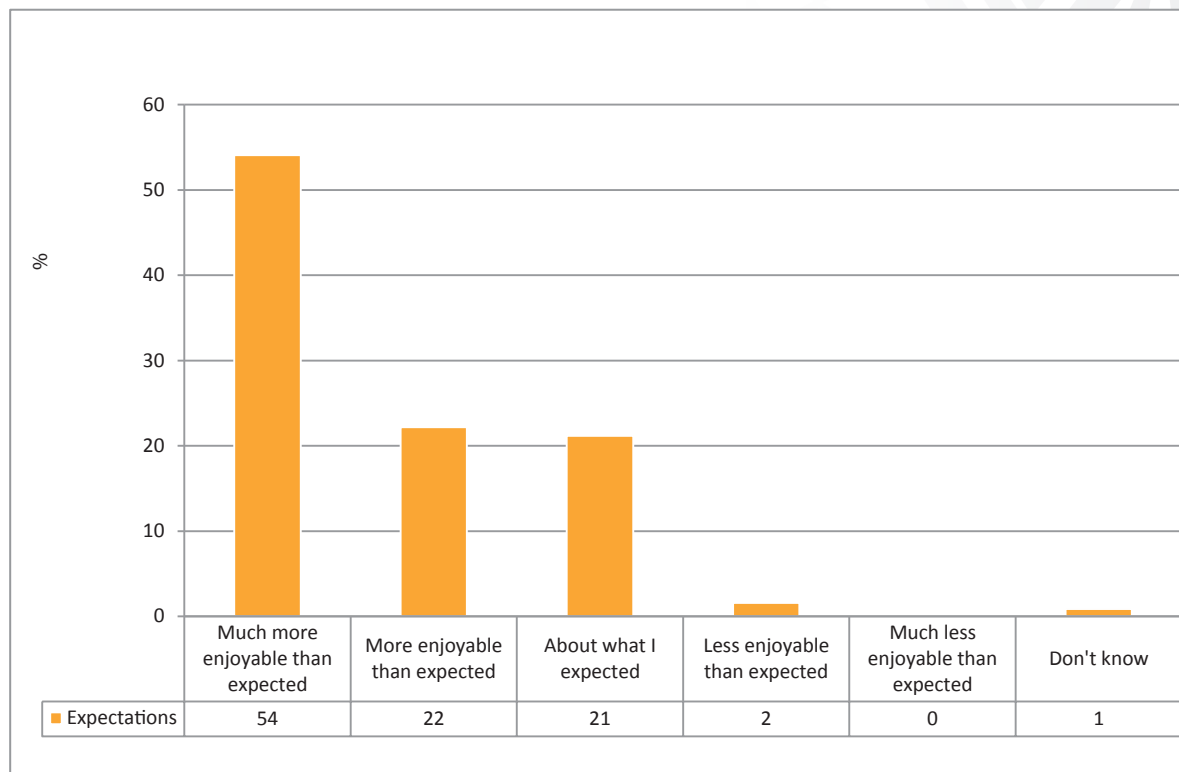
- Business (8%)
- Visiting friends/relatives (5%)
- Conference/convention (4%)
- Transit (4%)
- Education/training (1%)



## 4.8 Expectations of Fiji visits

Chart 24: Q81 How Fiji compared to expectations (first time visitors)

Base: 2,173



Base: First time visitors

Over half (54%) of first time visitors found their visit 'much more enjoyable than expected'. Twenty-two percent (22%) found their visit 'more enjoyable than expected'.

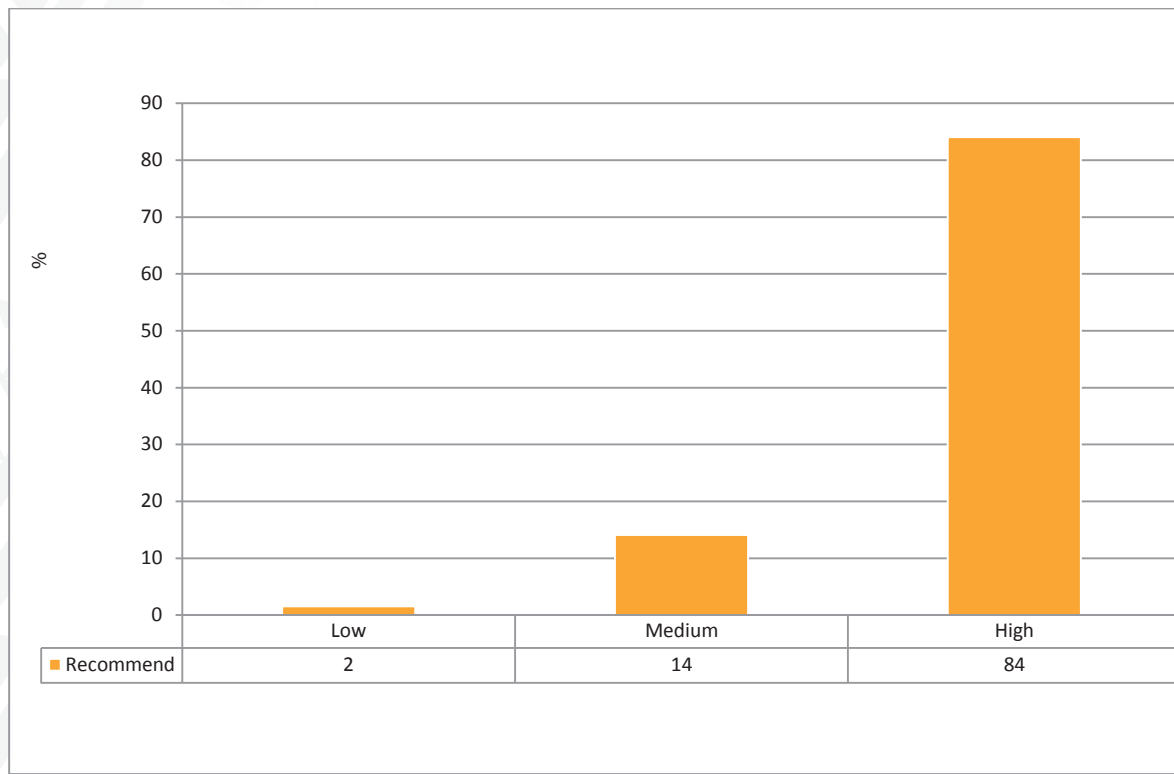
Few (2%) found Fiji 'less enjoyable than expected'.



## 4.9 Recommendation of Fiji as a place to visit

Chart 25: Q87 Likelihood of recommending Fiji as a place to visit

Base: 3,754



Base: All visitors

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

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

As the chart above shows, over three-quarters (84%) are likely to give a high recommendation of Fiji as a place to visit.

## Net Promoter Score

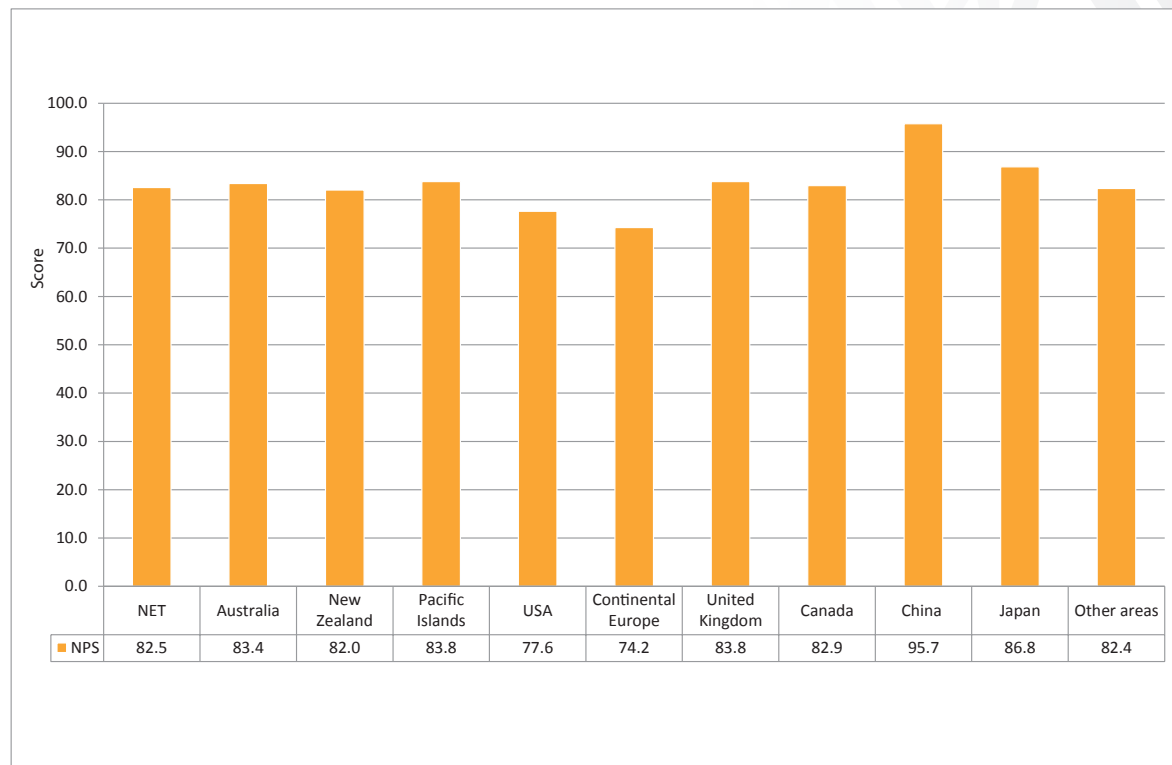
Fiji has an extremely high Net Promoter Score (NPS) of 82.7.

There are no differences by the Provinces or Tourism Areas visited.

The NPS is calculated by subtracting the percentage of those who rate recommendation as 6 or lower from those who rate recommendation as 9 or 10.

**Chart 26: Q87 Net Promoter Score by Country and Region of Residence**

**Base: 3,631**



Visitors from Continental Europe give a slightly lower NPS of 74.2 while visitors from China give a higher NPS of 95.7.

## 4.10 Impressions of Fiji

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

**Table 10: Q85 Favourable impressions of Fiji**

**Base: 3,767**

	%
The people	81
Hospitality	75
The climate/weather	43
Relaxing/peaceful	41
The scenery/nature	38
The beaches	27
Clear/beautiful water	22
Service at hotel/staff	18
The islands	18
Accommodation at hotel/resort	16
Snorkelling	11
Good food	7
Fiji time	6
Culture/craft	5
Good for kids/family	3
Swimming	3
The way of life	3

	%
Everything	3
Activities	3
Shopping	3
Coral reefs	2
Villages	2
Music/singing	2
Good value for money	2
Safe	2
Scuba diving	2
Clean environment/beaches/coast	1
Facilities at hotel/resort	1
Kava	1
Level of development	1
Well located/accessible/close to home	0
Cruise	0
Transport good/easy/cheap	0
Other	6

Base: All non-transit visitors

The most favourable impressions are:

- The people (81%)
- Hospitality (75%)



**Table 11: Q86 Unfavourable impressions of Fiji**

**Base: 3,699**

	%		%
Nothing	68	Poor shopping	1
Too expensive	7	Poor internet/no free Wi-Fi	0
Shopkeepers/traders	4	Illness/medical facilities	0
Quality of food/variety of food	3	Poverty	0
Service at hotel/slow service	3	Dangerous driving	0
Insects and bugs	3	Coral/dead coral	0
Dirty/untidy/pollution	3	Hotel tax/too high	0
Harassment on street to buy	2	Need better information	0
Poor holiday resort experience	2	Activities poor/lack of availability	0
The climate/weather	2	Water quality	0
Bad roads	2	Credit card fees	0
Taxi expensive/driving standard/unprofessional	1	Need local food	0
Airport facilities/customs/rude staff	1	Low wages for staff	0
Crime / feel unsafe/theft	1	Beach poor	0
F&B cost - expensive	1	Bed bugs	0
Transport/transfers	1	Climate/too hot/humid	0
Airline	1	Other	3

Base: All non-transit visitors

Zero percent (0%) shows percentage is less than 0.5%

Over two-thirds of visitors (68%) had no unfavourable impressions. The most common unfavourable impressions are:

- Too expensive (7%)
- Shopkeepers/traders (4%)
- Quality and variety of food (3%)
- Service at hotel/slow service (3%)
- Insects and bugs (3%)
- Dirty/untidy/pollution (3%)

#### **Differences by Province and Tourism Area**

There are no significant differences by Province and Tourism Areas.

## Differences by country and region of residence

There are some minor differences by country and region of residence;

- USA
  - Insects and bugs (8%)
  - Dirty/untidy/pollution (6%)
- Continental Europe
  - The weather (7%)
- United Kingdom
  - Insects and bugs (8%)

## Food quality

Food quality is always a concern in any accommodation operation, and as seen later in the report, food has the lowest satisfaction rating for accommodation. However, the favourable and unfavourable impressions put this into perspective. Seven percent (7%) of visitors mention food as a favourable impression while three percent (3%) mention food as an unfavourable impression.

Analysis of responses shows that unfavourable food impressions are a mix of the quality of food and the variety of food available.

One percent (1%) feels that food and drinks are expensive.

To answer this question in an unprompted fashion, the issue of food may be understated while a prompted question may result in a higher level of dissatisfaction. Analysis of all food responses show that the issue of food needs to be broken down into:

- Cost of food
- Quality of food
- Variety of food
- Availability of local food
- Availability of special food requests; vegetarian, low fat and other dietary requirements

This will be implemented in the 2016 IVS.

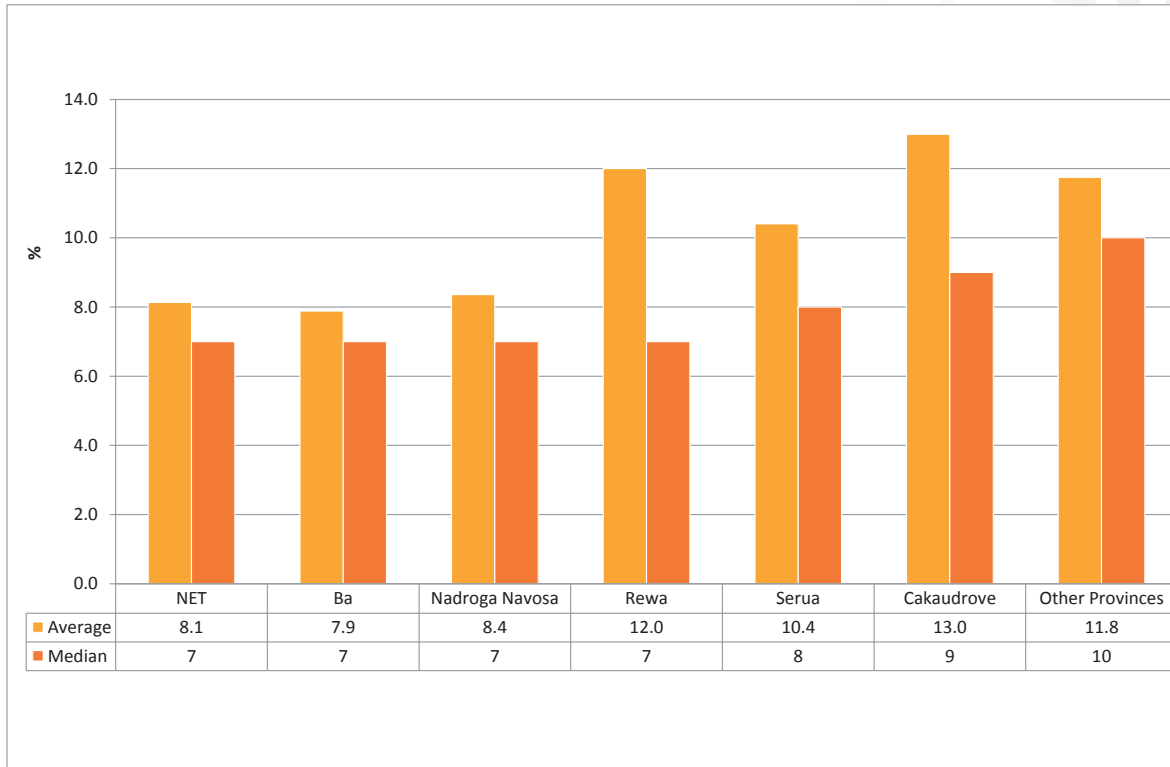
## 4.11 Length of stay in Fiji

The average length of stay in Fiji is 8.2 nights and the median length of stay is 7 nights.

Note that average length of stay is shown as 8.1 for those tourists who could be allocated to Province and Tourism areas.

**Chart 27: Q4 Average length of stay by Province**

**Base: 3,616**



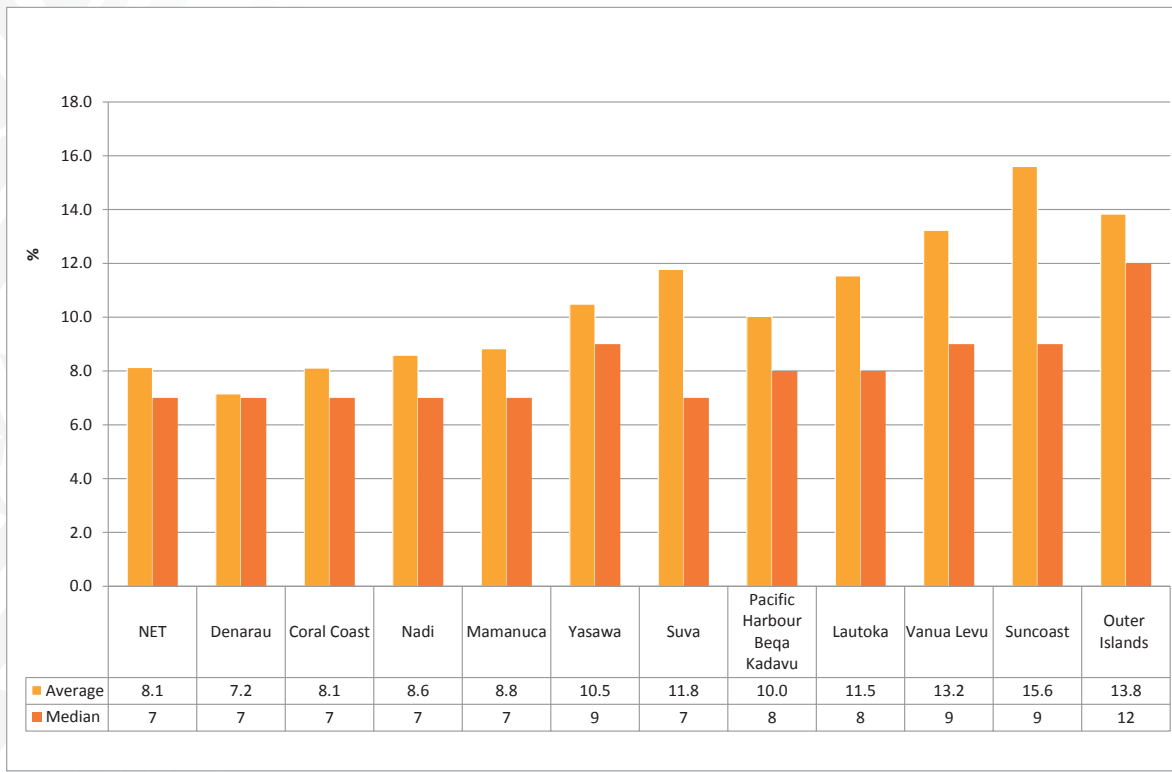
Base: All visitors

Average length of stay in Fiji is higher for:

- Cakaudrove (13)
- Rewa (12)
- Other provinces (11.8)
- Serua (10.4)

Chart 28: Q4 Average length of stay by Tourism Area

Base: 3,613



Base: All visitors

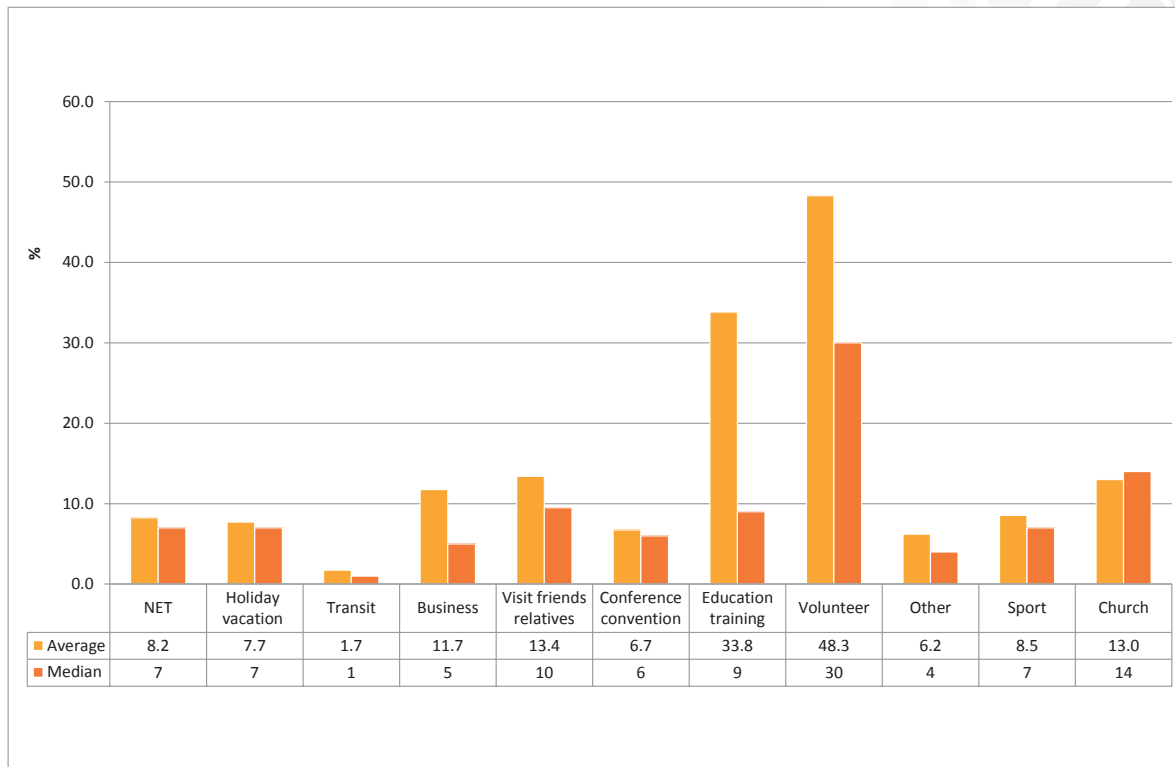
Average length of stay is lower for Denarau (7.2) and higher for:

- Suncoast (15.6)
- Outer Islands (13.8)
- Vanua Levu (13.2)
- Suva (11.8)
- Lautoka (11.5)
- Yasawa (10.5)
- Pacific Harbour/Beqa/Kadavu (10)
- Mamanuca (8.8)



**Chart 29: Q4 Average length of stay by main reason for visit**

**Base: 3,613**



Base: All visitors

Average length of stay is lower for:

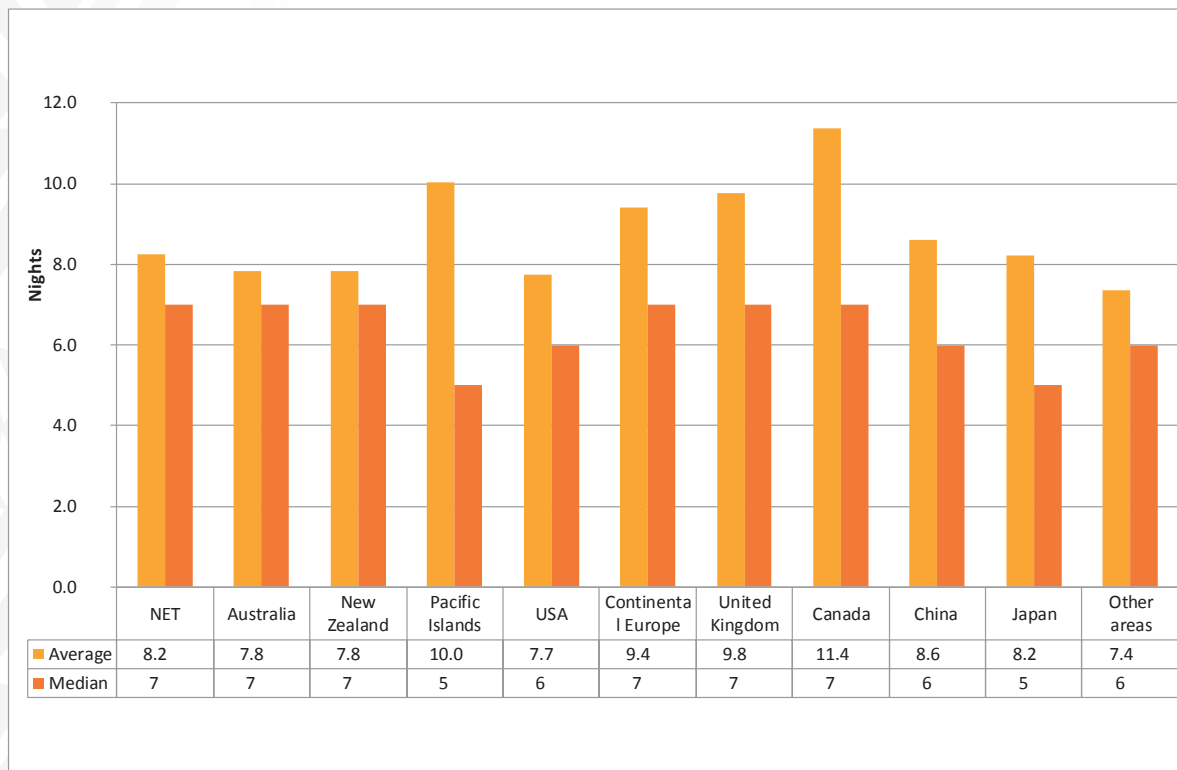
- Transit (1.7)
- Conference/convention (6.7)
- Holidays/vacation (7.7)

Average length of stay is higher for:

- Volunteer (48.3)
- Education/training (33.8)
- Visiting friends/relatives (13.4)

Chart 30: Q4 Average length of stay by country and region of residence

Base: 3,613



Base: All visitors

The differences in the chart above are not statistically significant due to the large number of visitors from Australia and New Zealand in the sample.

However, it is also clear that long-haul countries and regions such as Continental Europe, United Kingdom and Canada appear to have longer stays. Despite this, the median length of stay for these countries is no different to the median for all other countries.

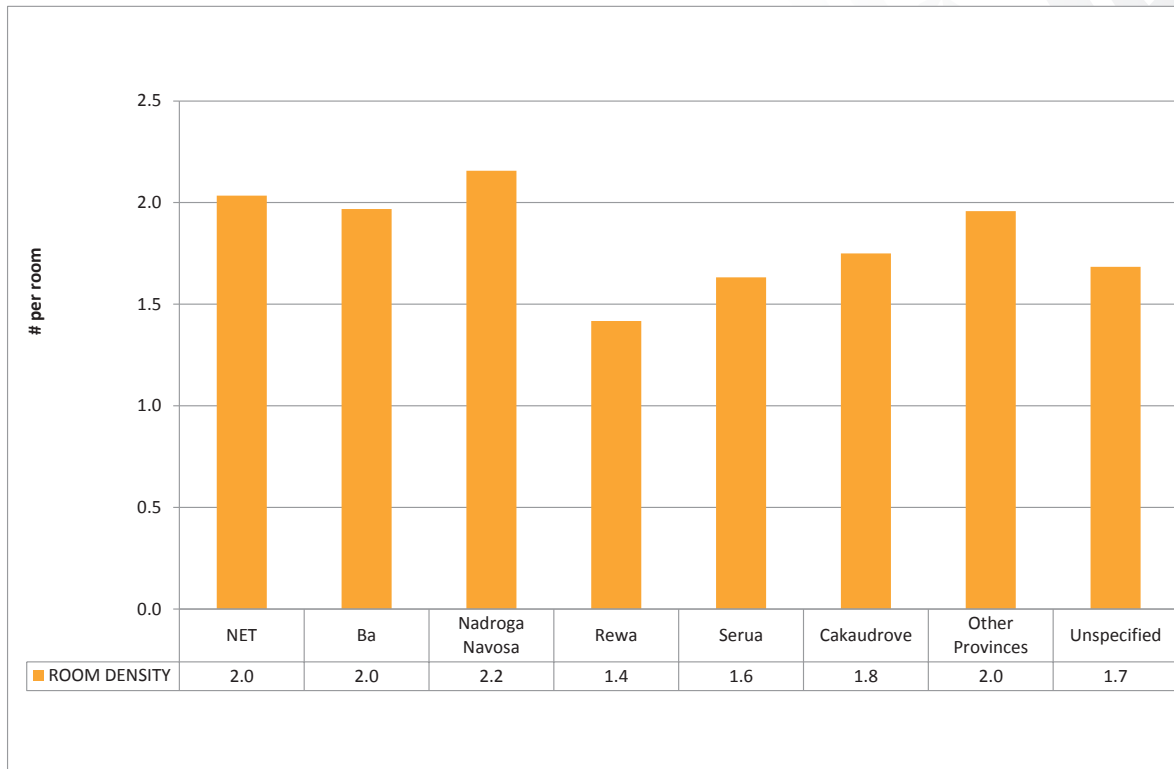
## 4.12 Room density

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

Average room density in 2014 is 2.0 people.

**Chart 31: Room density by Province**

**Base: 1,299**



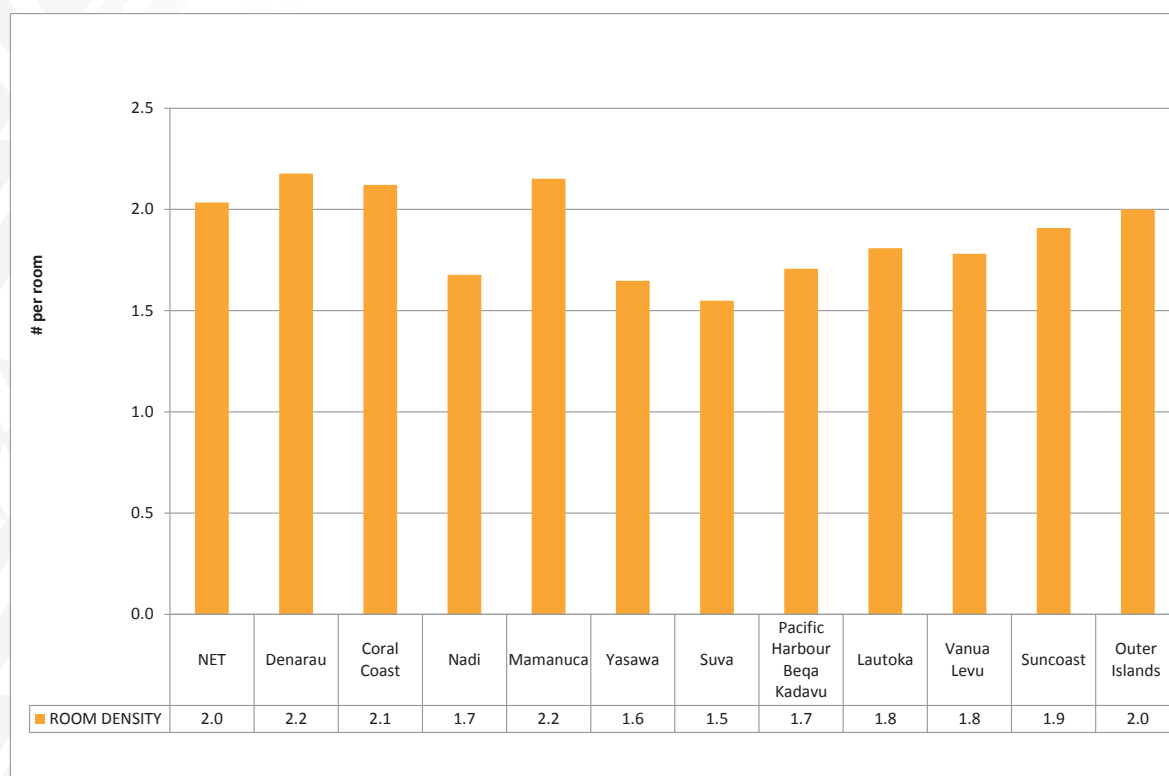
Base: All people

Room density is similar for all Provinces with the exception of lower density for:

- Rewa (1.4)
- Serua (1.6)
- Cakaudrove (1.8)

Chart 32: Room density by Tourism Area

Base: 1.299



Base: All visitors

Room density is higher for the Tourism Areas of:

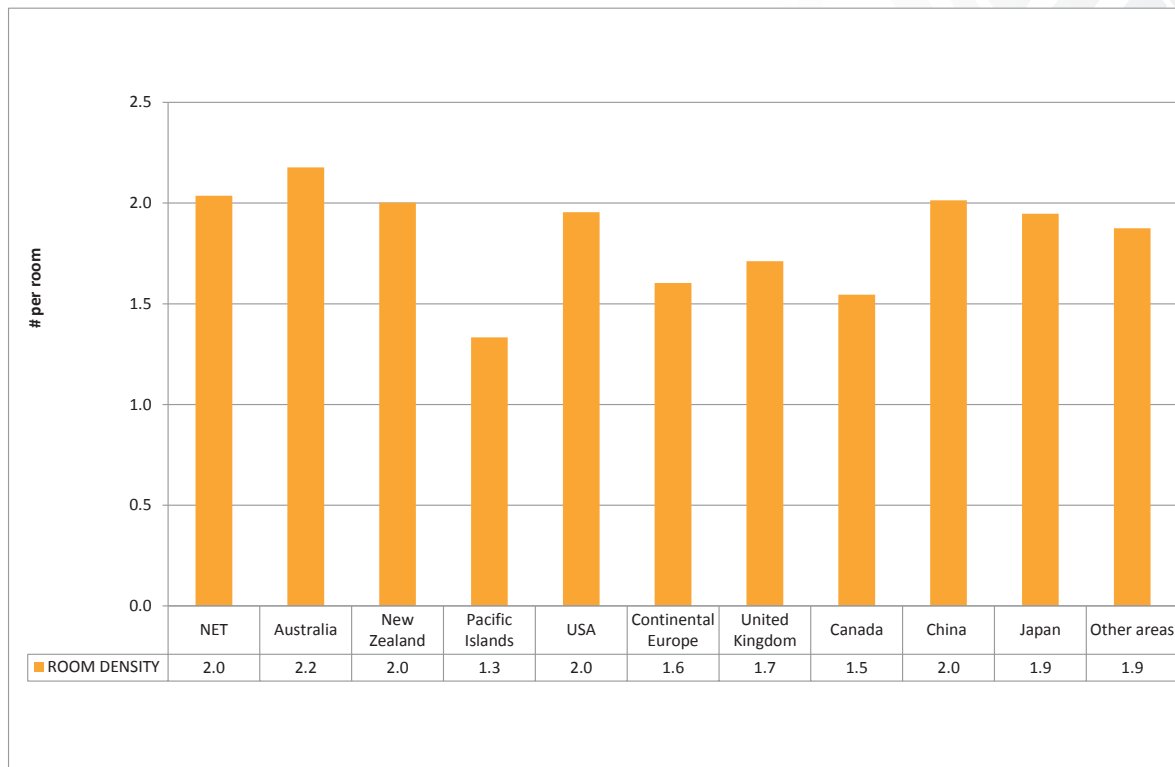
- Denarau (2.2)
- Mamanuca (2.2)
- Coral Coast (2.1)

Room density is lower for:

- Suva (1.5)
- Yasawa (1.6)
- Nadi (1.7)

**Chart 33: Room density by country and region of residence**

**Base: 1,281**



Base: All visitors

Room density is lower for visitors from:

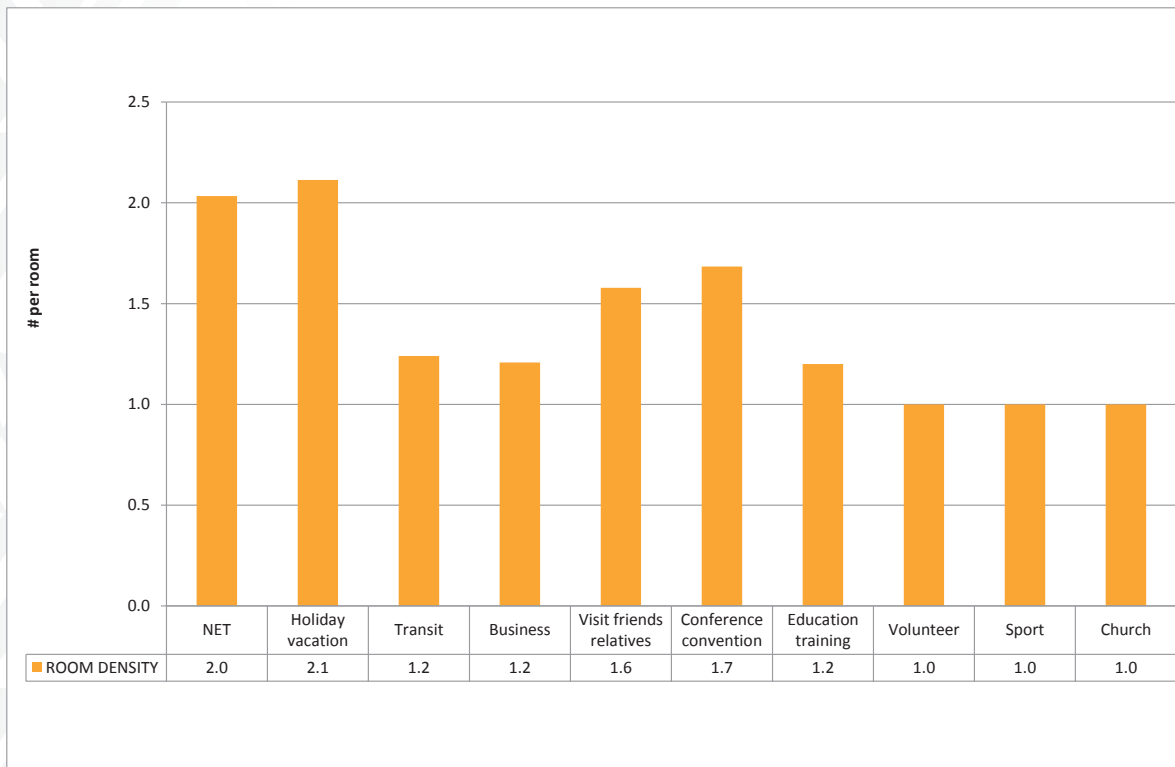
- Pacific Islands(1.3)
- Canada (1.5)
- Continental Europe (1.6)
- United Kingdom (1.7)

Room density is higher for visitors from:

- Australia (2.2)
- New Zealand (2.0)
- USA (2.0)
- China (2.0)

Chart 34: Room density by main reason for visit

Base: 1,293



Base: All visitors

Room density is higher for those on 'holiday/vacation' (2.1) and lower for all other main reasons for visit.

## 5 EXPENDITURE

### 5.1 Estimated total expenditure

Estimated total expenditure from visitors in 2014 is \$1,507,900,912.

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

**Table 12: Estimated spend by category**

**Base: 4,171**

Category	Estimated total spend
<b>Hotel</b>	
Total package and pre-paid	\$1,092,922,555
Additional accommodation	\$18,817,759
Additional food and drinks	\$133,269,232
Additional expenditure	\$64,270,910
<b>Total hotel expenditure</b>	<b>\$1,309,280,456</b>
Transfers	\$4,375,337
Non-hotel food and beverages	\$40,769,641
Retail purchases	\$79,318,998
Activities	\$38,640,405
Tours	\$6,144,001
Cruises	\$18,296,944
Rental cars	\$2,865,395
Public transport	\$7,653,982
Domestic airfare*	\$555,753
<b>TOTAL EXPENDITURE</b>	<b>\$1,507,900,912</b>

Base: All visitors

\*Domestic airfare n=39 and is not reliable

Spend in accommodation accounts for more than eighty-six percent (86%) of expenditure. Other key areas of expenditure are:

- Retail purchases
- Non-hotel food and beverages
- Activities
- Cruises

## 5.2 Estimated spend by Province

**Table 13: Estimated total spend by Province**

**Base: 4,114**

Province	Estimated total spend
Ba	\$690,299,941
Nadroga/Navosa	\$670,220,970
Rewa	\$65,395,219
Serua	\$41,399,001
Cakaudrove	\$52,635,598
Other Provinces	\$32,282,188
Unspecified	\$45,858,274

Base: All visitors

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

Full spend data by Province is included in Appendix: Expenditure.

The two Provinces with the highest spend are Ba and Nadroga/Navosa.

## 5.3 Estimated spend by Tourism Area

**Table 14: Estimated spend by Tourism Area**

**Base 4,114**

Tourism Area	Estimated total spend
Denarau	\$438,375,321
Coral Coast	\$336,421,044
Mamanuca	\$269,690,753
Nadi	\$221,886,047
Yasawa	\$90,296,481
Suva	\$60,428,073
Pacific Harbour/Beqa/Kadavu	\$52,941,535
Lautoka	\$51,873,829
Vanua Levu	\$48,763,140
Suncoast	\$13,009,489
Outer Islands	\$4,021,499

Base: All visitors

As in Province, not all expenditure may have taken place in the Tourism Area as the allocation is based on accommodation; however, it shows the value of visitors by each area. Lautoka includes cruising operations from the port that also provide accommodation.



Denarau alone accounts for the largest spend, that is twenty-eight percent (28%) of all visitor revenue million followed by:

- Coral Coast (21%)
- Mamanuca (17%)
- Nadi (14%)

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

## 5.4 Estimated spend by country and region of residence

**Table 15: Estimated spend by country and region of residence**

**Base: 4,114**

Country	Estimated total spend	Per person spend
Australia	\$820,503,454	\$2,350
New Zealand	\$237,562,594	\$1,916
Pacific Islands	\$127,786,620	\$3,252
USA	\$124,368,461	\$2,008
Continental Europe	\$73,129,988	\$2,391
United Kingdom	\$44,681,761	\$2,662
Canada	\$17,955,351	\$1,441
China	\$28,119,570	\$982
Japan	\$18,007,013	\$3,058
Other areas	\$18,797,739	\$788

Base: All visitors

In this analysis Hong Kong is included as China. Of the 28,642 visitors from China only 309 are from Hong Kong.<sup>1</sup>

The two largest markets Australia and New Zealand account for seventy percent (70%) of all expenditure.

Of the two countries, Australia has a per-person spend of \$2,350 compared to \$1,916 for visitors from New Zealand. The highest per-person spend are for those visitors from Pacific Islands with \$3,252. They are more likely to come for long-stay visits thus have a higher per-person spend. China being an emerging market is currently the second lowest spend of all visitors. However, this is expected to grow as the market continues to develop.

<sup>1</sup> FBOS Arrival Data

## 5.5 Estimated spend by main reason for visit

Table 16: Estimated spend by main reason for visit

Base: 4,114

Main reason for visit	Estimated total spend
Holiday/vacation	\$1,319,054,549
Transit	\$25,554,228
Business	\$62,300,799
Visit friends relatives	\$25,422,086
Conference convention	\$33,675,416
Education training	\$12,266,201
Volunteer	\$3,695,957
Other	\$2,901,562
Sport	\$4,297,556
Church	\$189,353

Base: All visitors

'Holiday/vacation' visitors account for seventy-nine percent (79%) of arrivals and eighty-nine percent (89%) of all expenditure.

'Business' travel spend accounts for four percent (4%), 'conference/convention' two percent (2%) and 'visiting friends and relatives' two percent (2%).



## 5.6 Estimated spend for holiday/vacation

**Table 17: Estimated spend for 'holiday/vacation'**

**Base: 3,264**

Holiday/vacation	Estimated total spend
Rest and relaxation	\$1,058,689,128
Honeymoon	\$455,221,177
Wedding	\$77,055,292
Scuba diving	\$38,019,763
Wedding anniversary	\$6,857,774
Surfing	\$5,472,923
Fiji culture	\$292,910
Sport	\$171,392
Transit short stay	\$28,360
Golf	\$2,156,715
Other	\$196,707,103

Base: Visitors for 'Holiday/vacation'

The largest spend is by those visiting for 'rest and relaxation' (85% of 'holiday/vacation' visitors) with over \$1 billion in spend. Those on honeymoon are only seven percent (7%) of visitors but spend over twice the average amount compared to other visitors, making their total spend \$455 million.

The dedicated 'scuba diving' market is also a high spending group who make up only one percent (1%) of visitors but spend \$38 million. It is important to note that this may be understated as visitors engaged in 'rest and relaxation' also engage in scuba diving and other leisure activities. Spend on activities is shown in Table 18.

Other key niche markets are those visiting for 'wedding' (\$77 million) and those visiting for 'surfing' (\$5.4 million) and 'golf' (\$2.1 million).

The results show that niche markets are powerful drivers of spend in Fiji and development of these markets will increase tourism revenue that has higher yield than a 'rest and relaxation' visitor.

## 5.7 Estimated spend on activities

Total estimated expenditure for activities is \$38,640,408.

**Table 18: Estimated spend on activities**

**Base: 4,337**

Activity	Estimated total spend
Massage/spa	\$15,468,134
Scuba Diving	\$7,517,092
Jet ski	\$2,836,484
Deep/big game fishing	\$1,397,864
Other	\$1,731,905
Hair braiding	\$1,175,123
Manicure/facial	\$927,122
Golf	\$919,975
Jet boat	\$740,112
Other fishing	\$700,630
Snorkelling	\$631,855
Boat ride	\$588,552
Parasailing	\$499,045
Babysitting	\$446,049
Surfing	\$428,430
Village visit / tour	\$373,594
Dancing/night club	\$314,300
Sky diving	\$261,799
Firewalking	\$242,907
Shopping	\$154,957
Canoeing/kayaking	\$146,466
Dolphin watching	\$143,777
Horse riding	\$141,867
Wind surfing	\$114,625
Banana boat	\$106,276
Cultural centre/Fort, etc.	\$105,781
Coral viewing	\$101,465
Sailing/Yachting	\$93,045
Cinema	\$68,952
Jet boat fresh water	\$56,605
Volleyball	\$50,945
Bushwalking/hiking	\$48,822

Activity	Estimated total spend
Gym	\$18,184
Meke	\$17,831
Fishing	\$16,982
Bike riding/cycling	\$14,151
Weaving	\$12,029
Boat ride - fresh water	\$12,029
Church service	\$8,420
Museum visit	\$4,670
Motor bike riding	\$1,415
Kava drinking/ceremony	\$142

Base: All those carrying out activities

Key spend activities for visitors to Fiji are 'massage/spa' (\$15 million), 'scuba diving' (\$7.5 million), 'jet ski' (\$2.8 million), 'deep/big game fishing' (\$1.39 million) and 'hair braiding' (\$1.17 million).

It is also important to note that many activities are carried out at 'no cost', for example 'bird watching' and 'laying on beach'.

Caution should be used in interpreting spend on some of these activities as some have low base sizes.



## 5.8 Retail estimated expenditure

Total estimated expenditure for retail purchases is \$79,318,998.

**Table 19: Estimated total retail spend**

**Base: 4,171**

Retail area	Total estimated spend
Other souvenirs	\$30,816,871
Clothing	\$20,563,205
Locally made handicrafts	\$5,684,730
Foodstuffs	\$5,575,510
Jewellery	\$5,144,420
Alcohol	\$4,779,333
Perfume	\$2,266,059
Shoes/sandals	\$1,203,728
Cameras & camera equipment	\$933,965
Watches/clocks	\$675,674
Cigarettes/tobacco	\$467,732
Handbags/wallets	\$414,412
Suitcases/travel bags	\$187,663
Toys/games	\$185,053
Books/stationery	\$184,056
Materials/textiles	\$100,056
Music/videos (CD/DVD/etc.)	\$71,277
Paintings	\$58,226
Film/processing/printing	\$7,027

Base: All visitors with retail spend

The key items showing higher spend are 'other souvenirs' (\$30 million) and 'clothing' (\$20 million).

The categories used for retail spend have not been updated since the implementation of the IVS and some categories may not accurately represent the actual items where spend has occurred. For example, 'film/processing/printing' in the age of digital cameras means it is unclear exactly what spend has taken place.

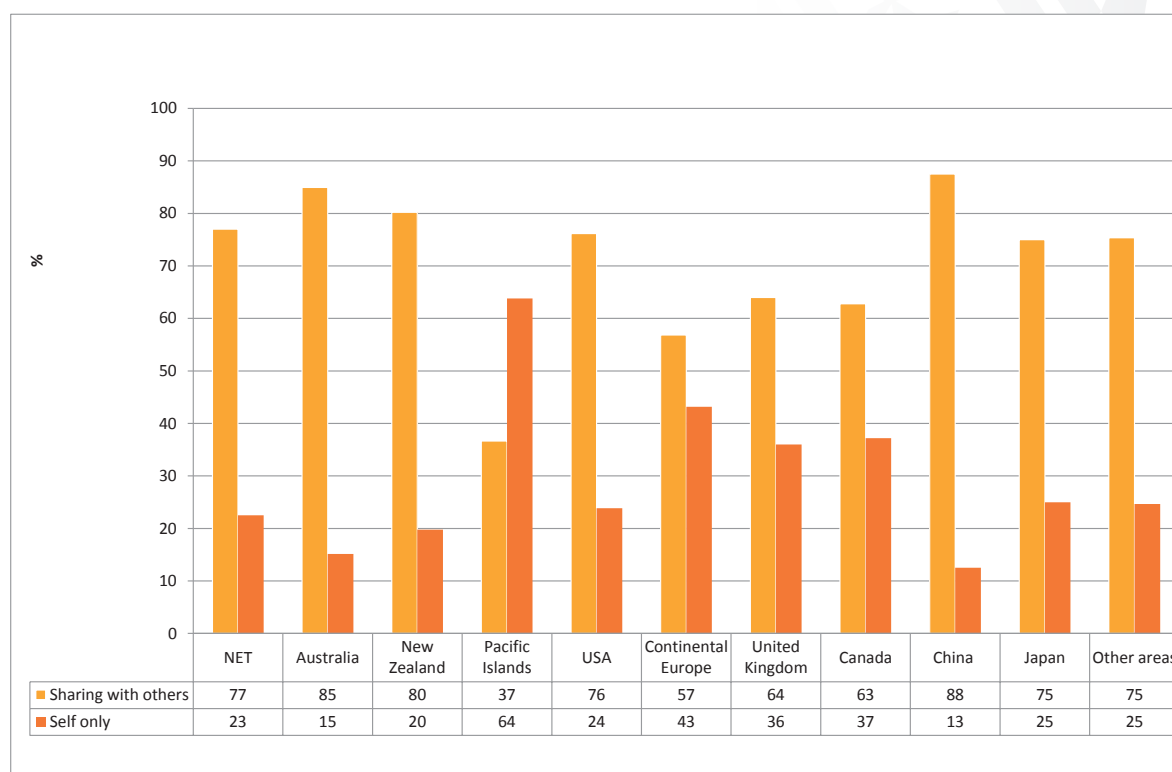
There is an opportunity for growth in 'locally made handicrafts' where spend is relatively small compared to 'other souvenirs'. In the unfavourable impressions section, some visitors mentioned products that were from Fiji but appeared to be imported from other countries. The branding of Fijian Made products should give confidence to visitors in purchasing handicrafts that are made in Fiji as authenticity plays a vital role in tourism and travel today.

## 5.9 Sharing costs with others

Seventy-seven percent (77%) of visitors were sharing expenses with others while twenty-three percent (23%) were paying for themselves only.

**Chart 35: Q21 Sharing expenses with other people by country and region**

**Base: 3,684**



Base: All visitors

Visitors most likely to share costs with others came from:

- China (88%)
- Australia (85%)
- New Zealand (80%)
- USA (76%)

Visitors from these countries show higher percentage of shared costs as they generally travel as couples and families therefore are bound to share expenses.

Visitors least likely to share costs with others came from:

- Pacific Islands (37%)
- Continental Europe (57%)
- Canada (63%)
- United Kingdom (64%)

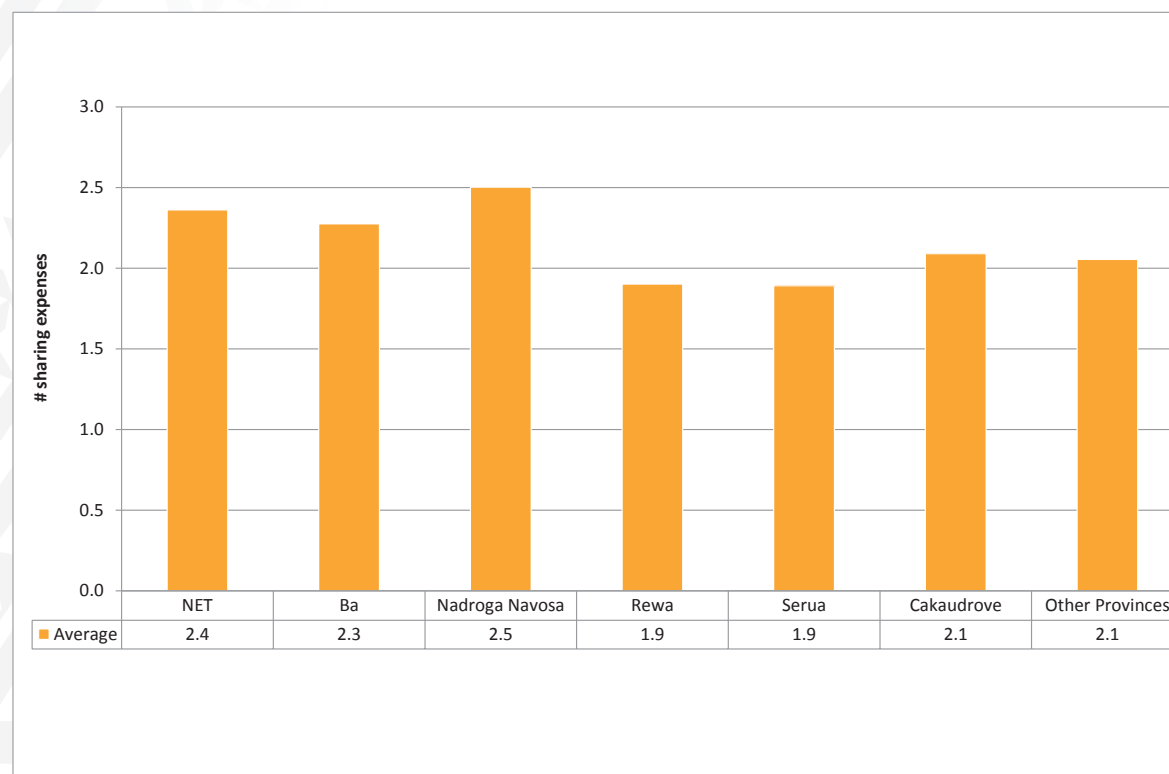
Visitors from Pacific Islands have the least cost sharing as they generally travel alone for reasons such as 'transit', 'business' and 'education/training'. Similarly, visitors from Continental Europe and United Kingdom are least likely to share costs as they are mainly backpackers who tend to travel alone.

## 5.10 Number of people in group sharing expenditure

The average number of people sharing expenses (including self) is 2.4 people.

**Chart 36: Q22 Number of people sharing expenses by province**

**Base: 2,715**



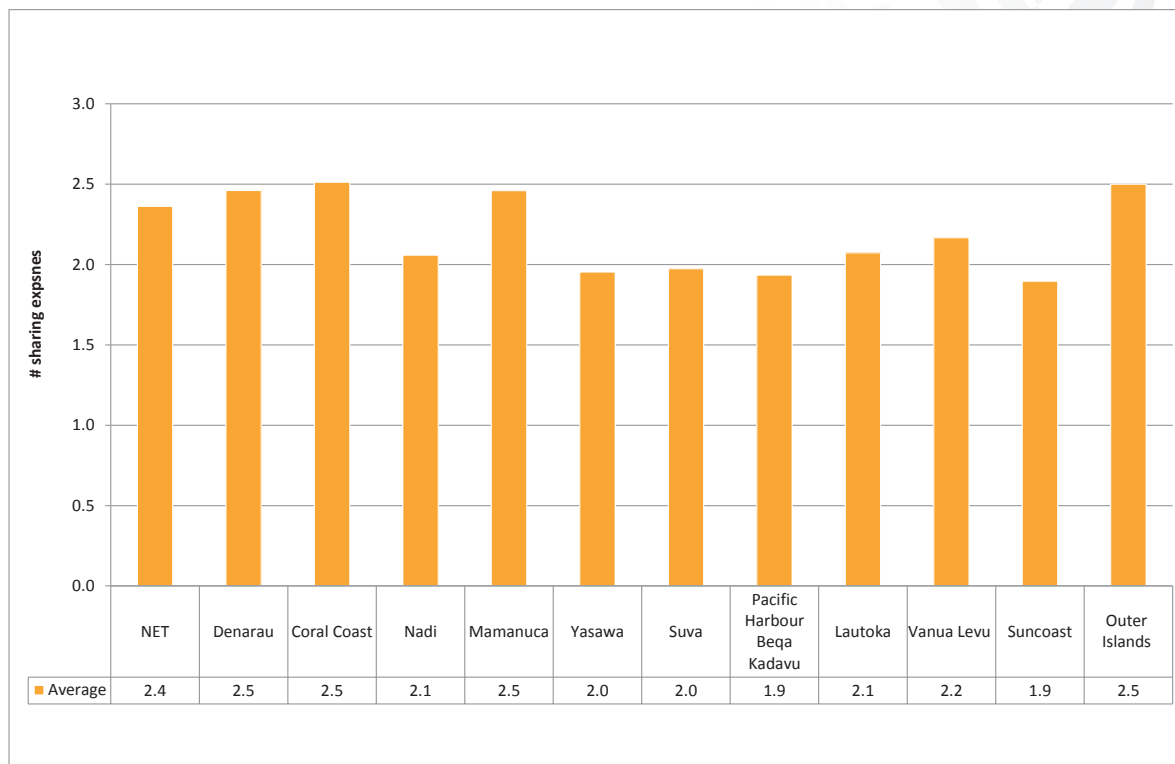
Base: All visitors

The number of people sharing expenses is higher for Nadroga/Navosa (2.5 people) as these Provinces receive the highest percentage of families and couples as seen in chart 41. Additionally, the average is lower for Rewa (1.9) and Serua (1.9) as these Provinces mainly had visitors travelling as 'self only'.



Chart 37: Q22 Number of people sharing expenses by Tourism Area

Base: 2,715



Base: All visitors

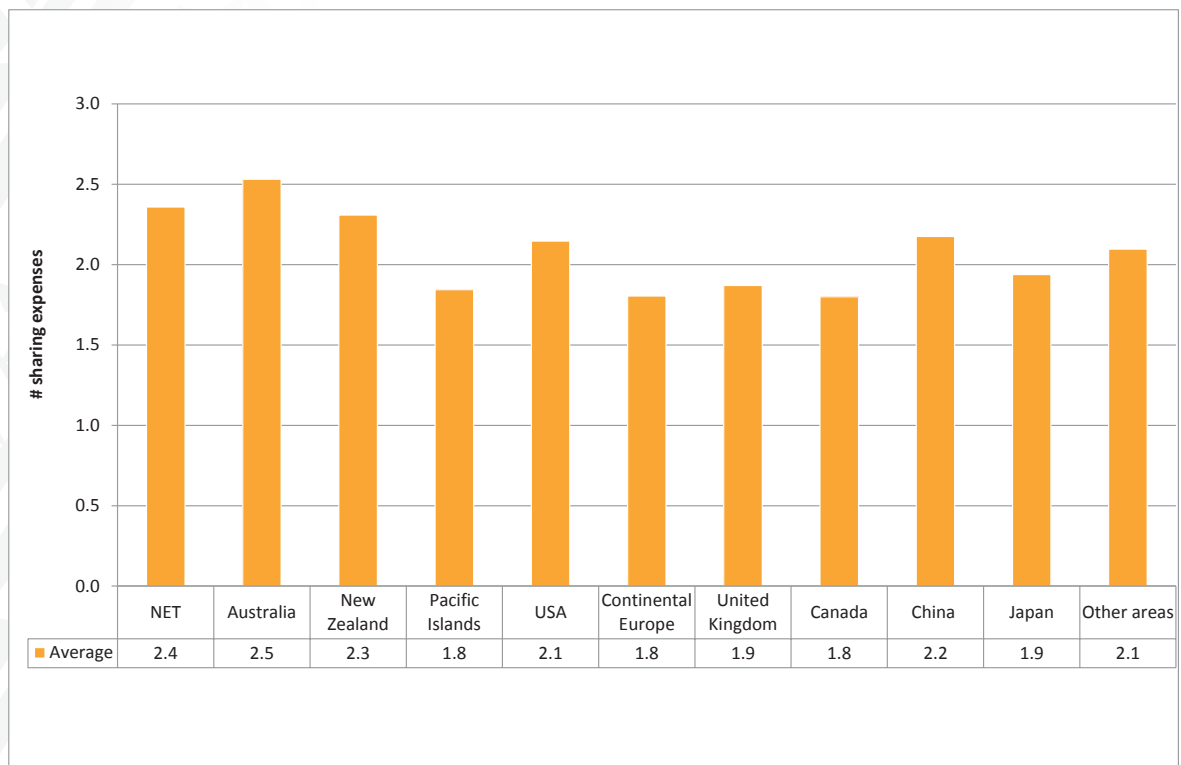
The number of people sharing expenses is higher for:

- Denarau (2.5)
- Coral Coast (2.5)
- Mamanuca (2.5)
- Outer Islands (2.5)

Tourism areas showing shared expenses with less than two people are:

- Pacific Harbour/Beqa/Kadavu (1.9)
- Suncoast (1.9)

**Chart 38: Q22 Number of people sharing expense by country and region of residence Base: 2,801**



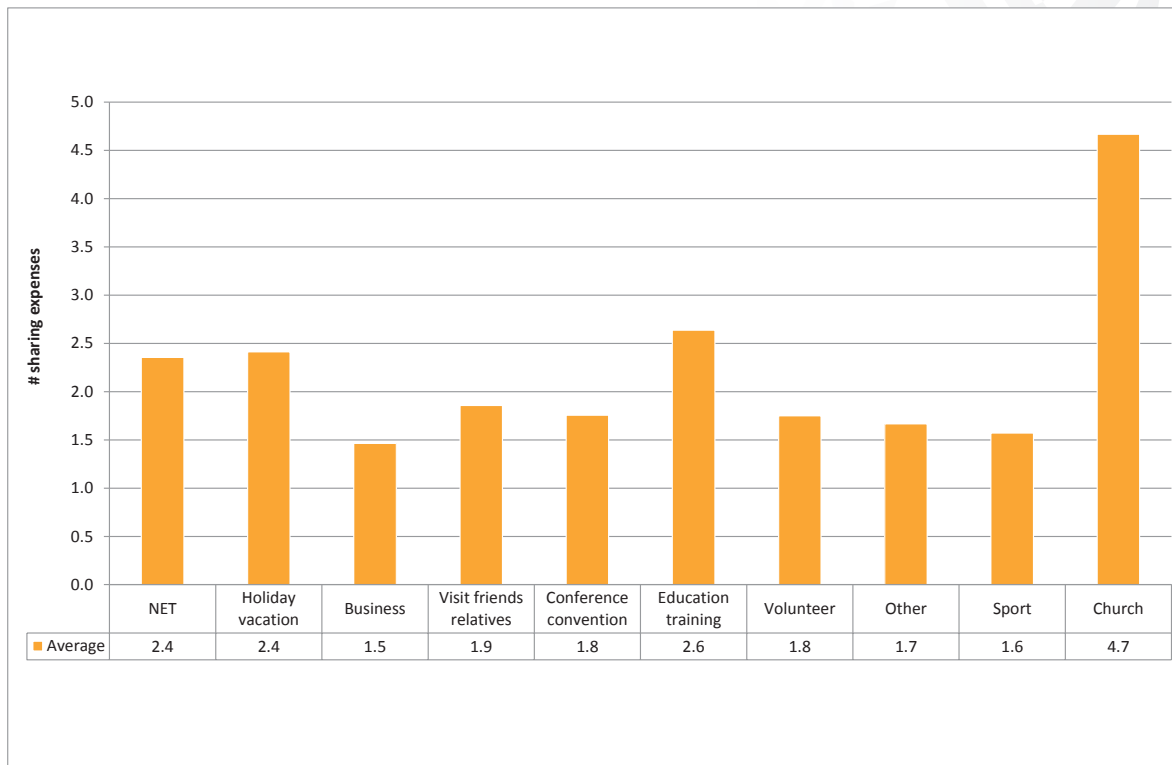
Base: All visitors

Those sharing expenses are higher for Australia (2.5 people) and New Zealand (2.3 people).



Chart 39: Q22 Number of people sharing expenses by main reason for visit

Base: 2,801



Base: All visitors

Visitors travelling for 'church' are the highest in sharing expenses (4.7 people) whereas visitors on 'holiday/vacation' on average share expenses with 2.4 people.

## 6 TRAVEL GROUPS

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

- Group structure
- Gender
- Age of visitors

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

The most significant group in this section are those visiting Fiji as ‘couple/partners/husband and wife’ (44%). The family market (parent/s with children) is also important as they make up twenty percent (20%) of all travel groups.

Visitors travelling as ‘self only’ make up twenty-one percent (21%) of arrivals. This group is likely to be travelling for ‘transit’ (68%), ‘business’ (70%), ‘visiting friends/relatives’ (59%), ‘conference/convention’ (54%), ‘education/training’ (69%) and ‘volunteer’ (77%).

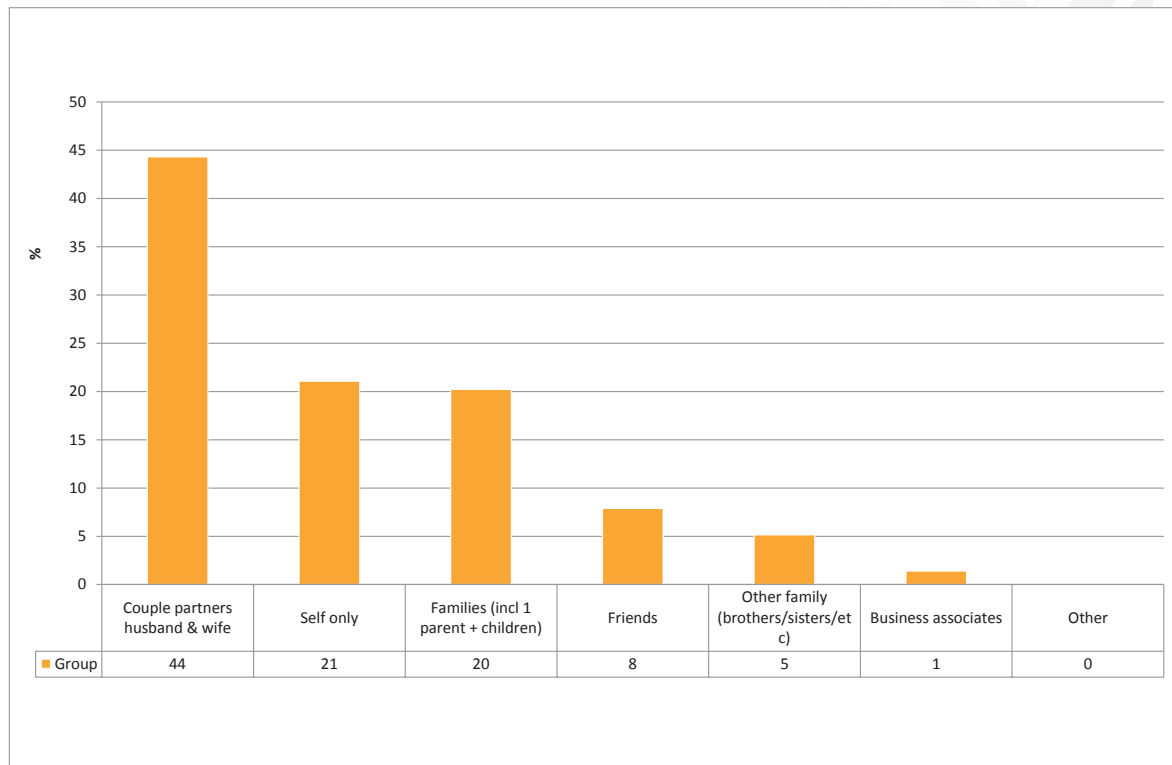
Additionally, those travelling as ‘friends’ make up eight percent (8%) of arrivals.



## 6.1 Travelling group

Chart 40: Q17 Travelling group

Base: 3,702

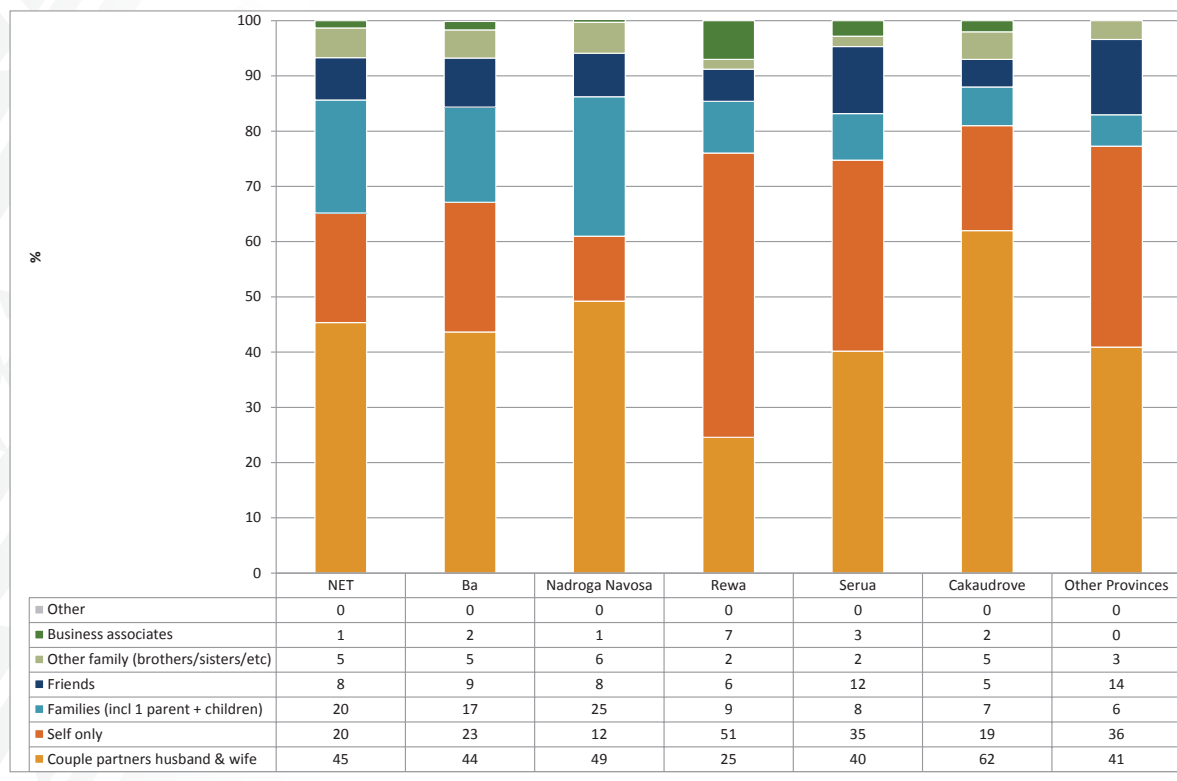


Base: All visitors

Almost half (44%) visit as a couple while a further twenty percent (20%) visit as families with children (including one parent with children). Twenty-one percent (21%) visit by themselves while eight percent (8%) visit with friends.

Chart 41: Q17 Travelling group by Province

Base: 3,487



Base: All visitors

Couples are more likely to visit:

- Cakaudrove (62%)
- Nadroga/Navosa (49%)
- Ba (44%)

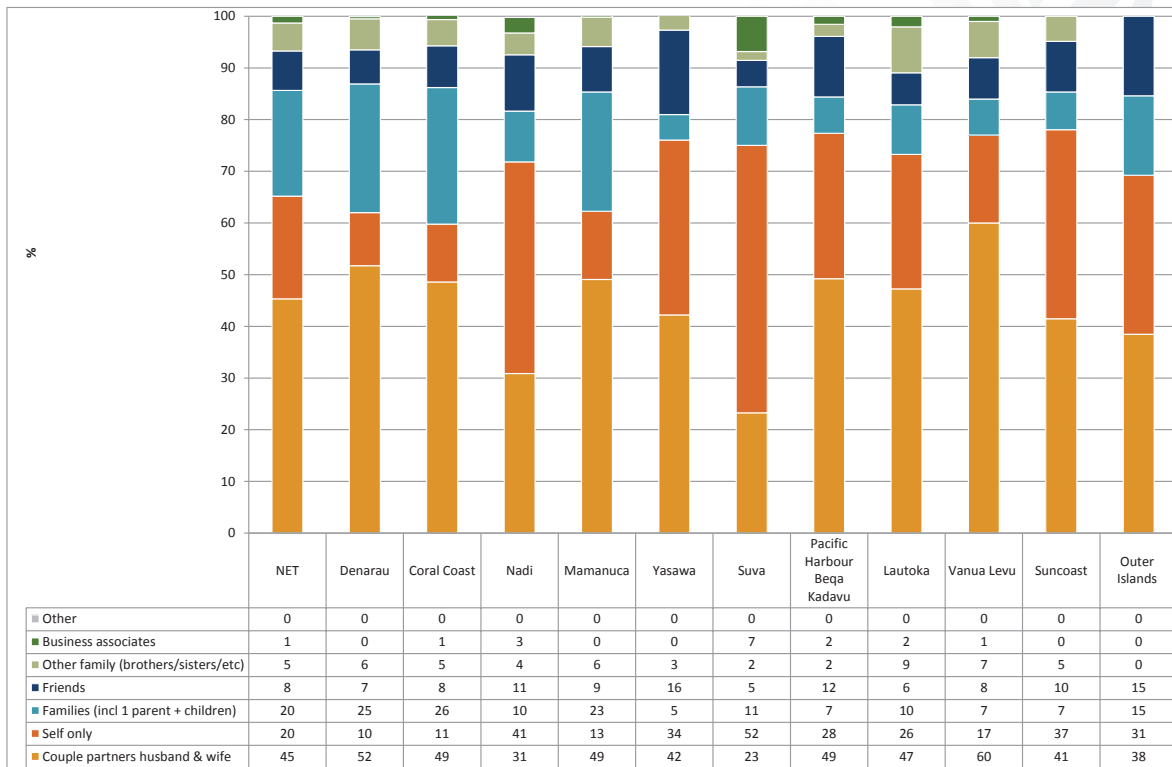
Visitors travelling by themselves are more likely to visit:

- Rewa (51%)
- Other Provinces (36%)
- Serua (35%)

Families are more likely to visit Nadroga/Navosa (25%).

Chart 42: Q17 Travelling group by Tourism Area

Base: 3,674



Base: All visitors

Couples are more likely to visit:

- Vanua Levu (60%)
- Denarau (52%)

Visitors travelling by themselves are more likely to visit:

- Suva (52%)
- Nadi (41%)
- Suncoast (37%)
- Yasawa (34%)
- Pacific Harbour/Beqa/Kadavu (28%)

Families are more likely to visit:

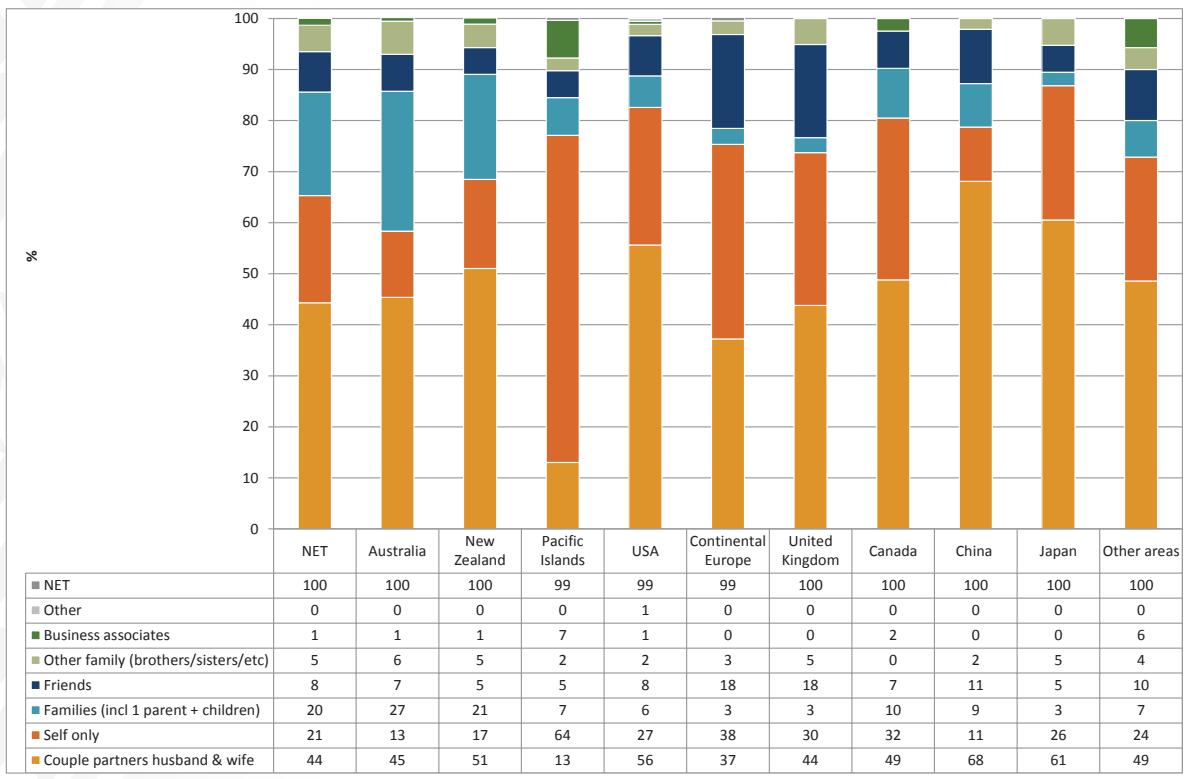
- Coral Coast (26%)
- Denarau (25%)
- Mamanuca (23%)

Those travelling with friends are more likely to visit:

- Yasawa (16%)
- Outer Islands (15%)
- Pacific Harbour/Beqa/Kadavu (12%)

Chart 43: Q17 Travelling group by Country and Region of Residence

Base: 3,674



Base: All visitors

Couples are more likely to come from:

- China (68%)
- Japan (61%)
- USA (56%)
- New Zealand (51%)

Visitors travelling by themselves are more likely to come from:

- Pacific Islands (64%)
- Continental Europe (38%)
- Canada (32%)
- United Kingdom (30%)

Families are more likely to come from:

- Australia (27%)
- New Zealand (21%)

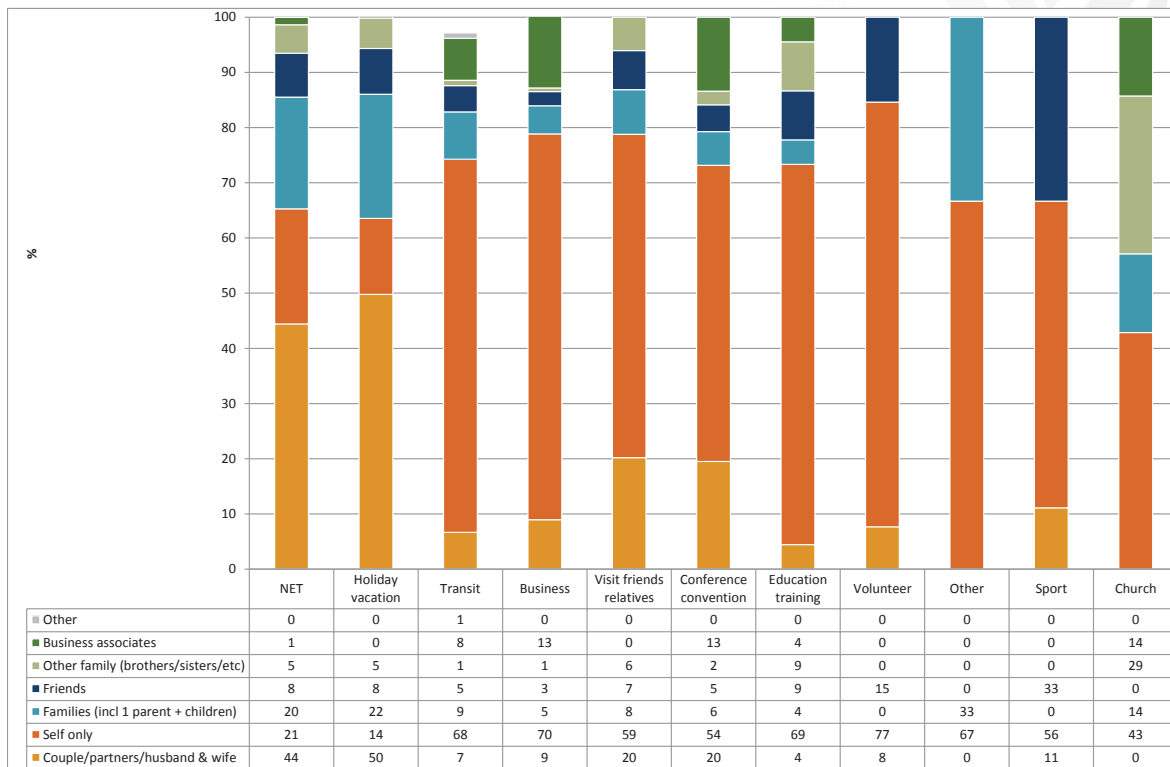
Visitors travelling with friends are more likely to come from:

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



Chart 44: Q17 Travelling group by main reason for visit

Base: 3,677



Base: All visitors

- Couples (50%) and families (22%) are more likely to come for a 'holiday/vacation'.
- Visitors travelling by themselves are more likely to come for:
  - Volunteer (77%)
  - Business (70%)
  - Education/training (69%)
  - Transit (68%)
  - Visiting friends or relatives (59%)
- Business associates are more likely to come for:
  - Church (14%)
  - Business (13%)
  - Conference/convention (13%)

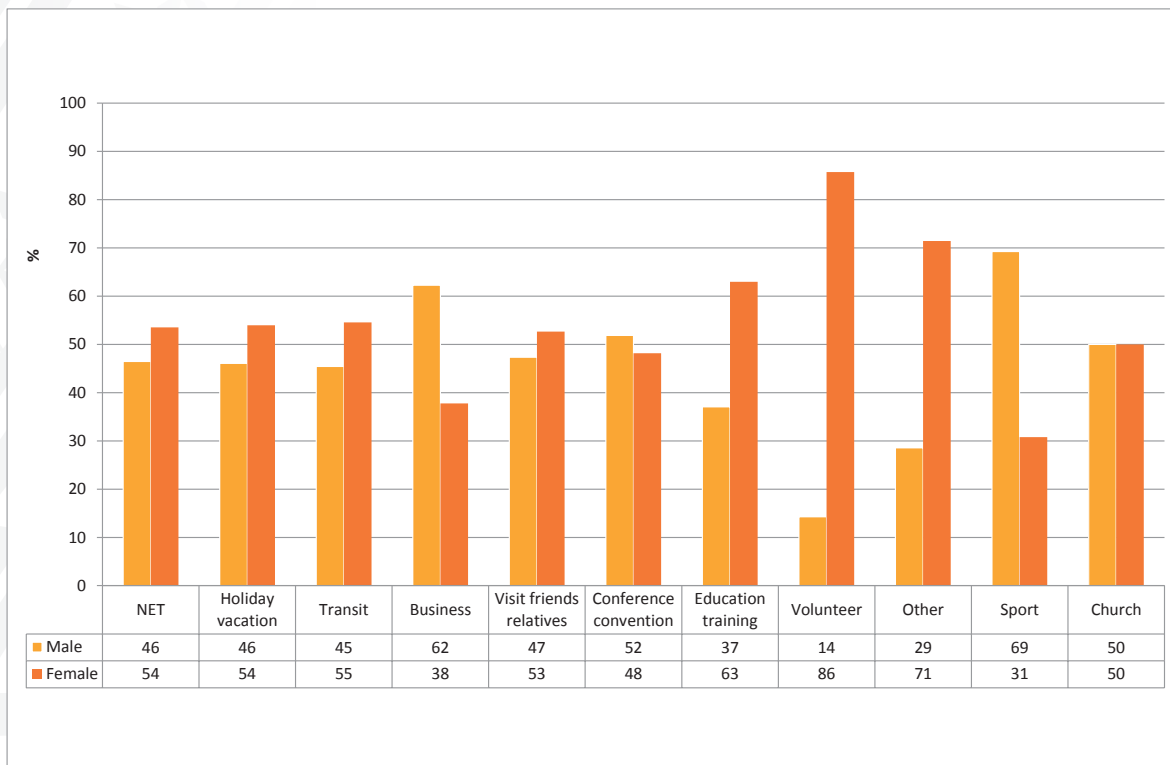


## 6.2 Gender

Forty-six percent (46%) of visitors are men and fifty-four percent (54%) of visitors are women. There is little difference by Province, Tourism Area and country and region of residence.

**Chart 45: Q91 Gender by main reason for visit**

**Base: 4,132**



Base: All visitors

Men are more likely to visit for:

- Sport (69%)
- Business (62%)

Women are more likely to visit to volunteer (86%).

## 6.3 Age of visitors

**Table 20: Q90 Age of visitors and estimated visitor numbers**

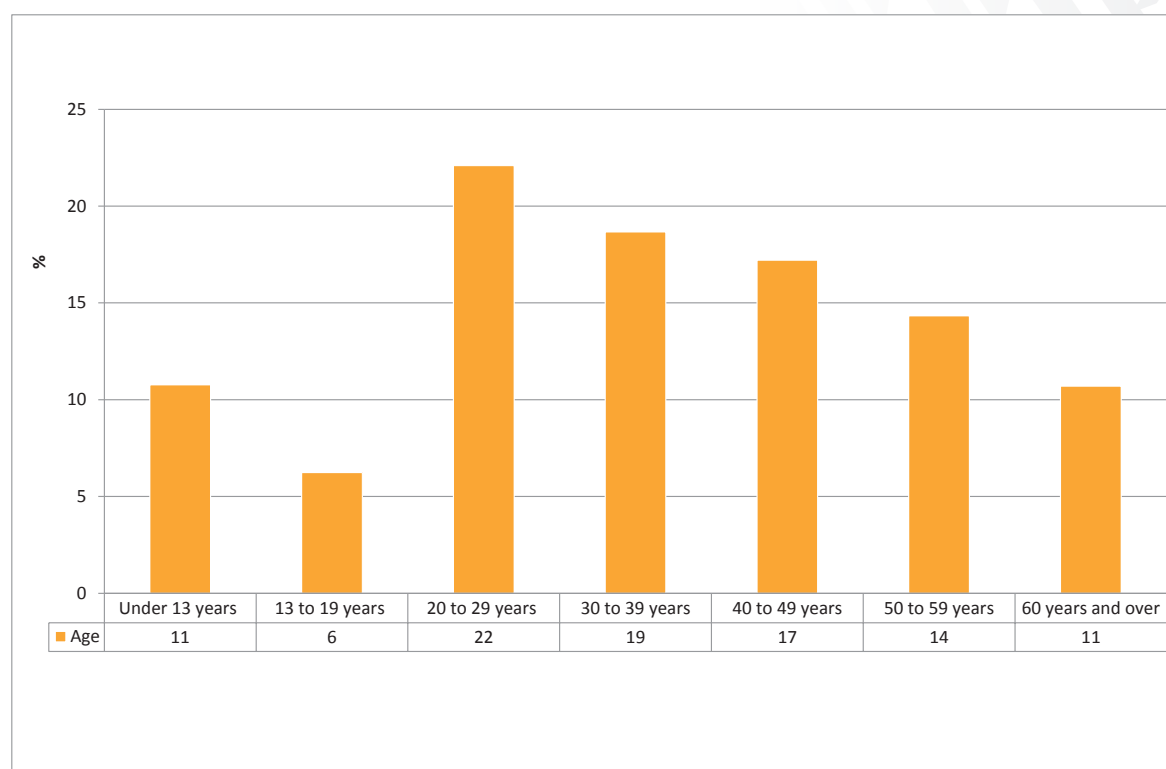
**Base: 4,318**

	%	Estimated number of visitors
Under 13 years	11	74,580
13 to 19 years	6	43,172
20 to 29 years	22	153,042
30 to 39 years	19	129,280
40 to 49 years	17	119,163
50 to 59 years	14	99,283
60 years and over	11	74,110
<b>Total</b>	<b>100</b>	<b>692,630</b>

Base: All visitors

**Chart 46: Q90 Age of visitors**

**Base: 4,318**

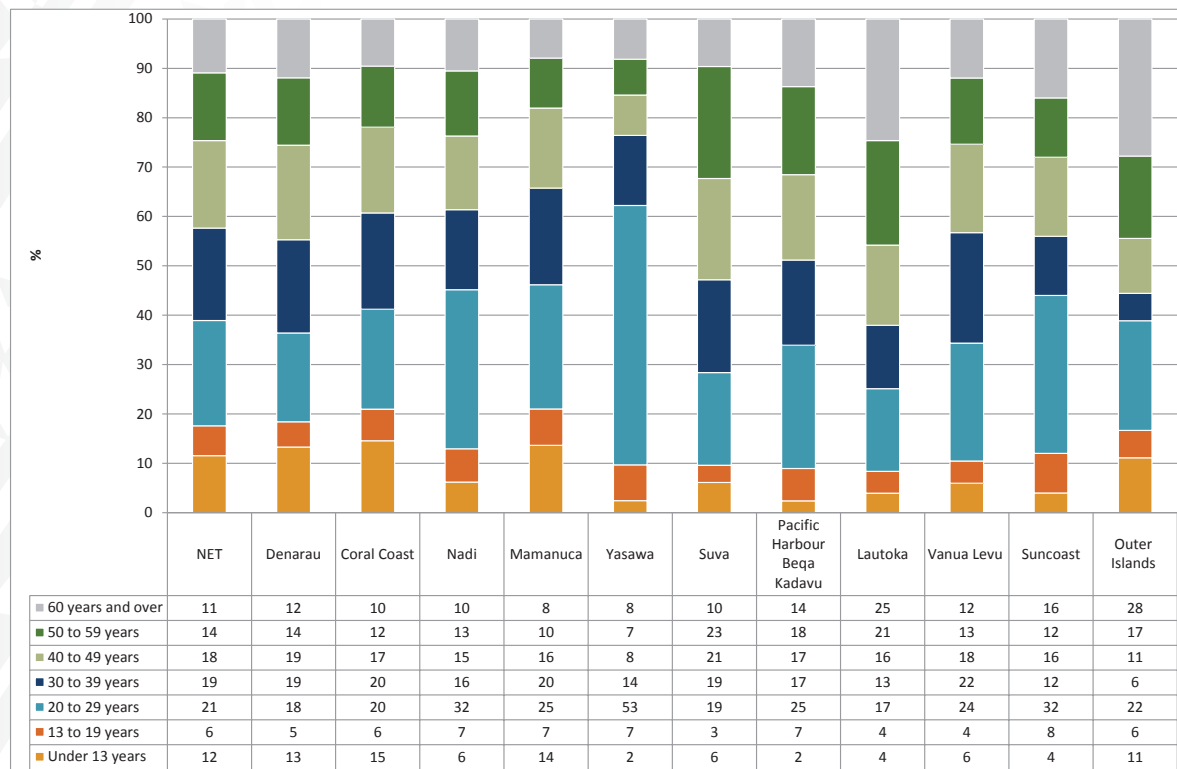


Base: All visitors

The largest group of visitors is in the age range of 20 to 29 years (22%).

Chart 47: Q90 Age of visitors by Tourism Area

Base: 3,631



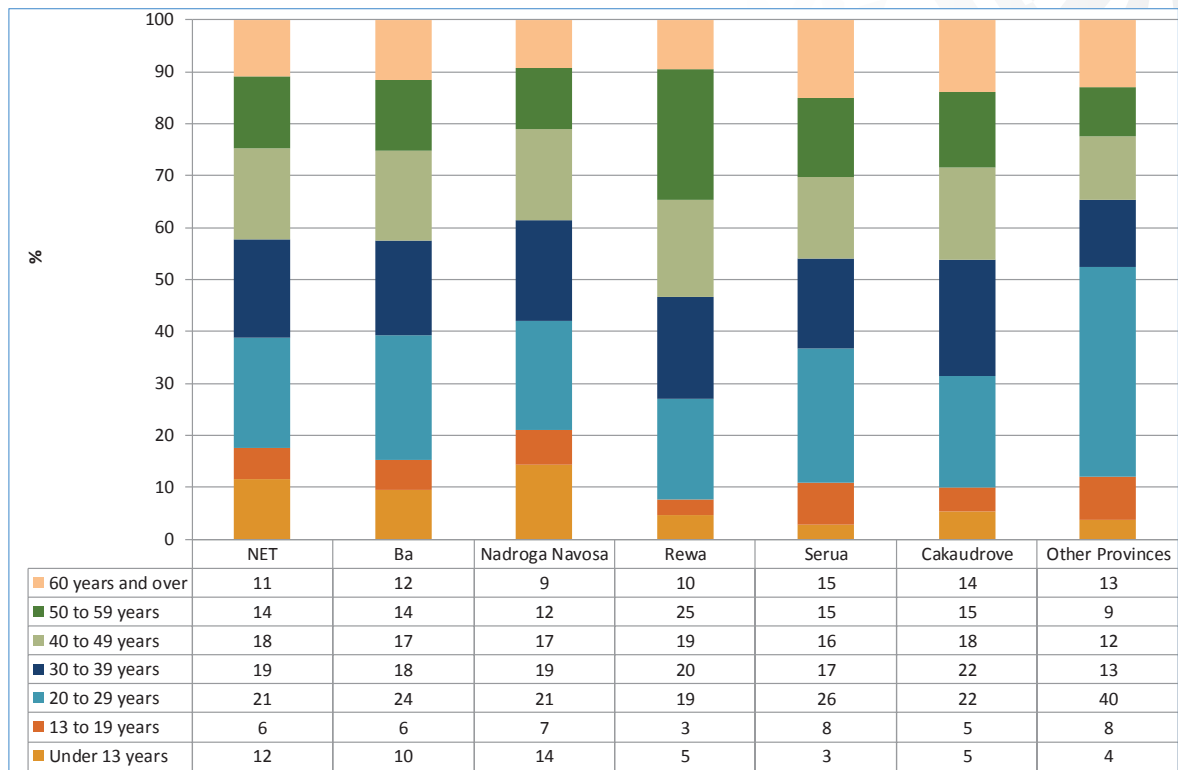
Base: All Visitors

Tourism areas most likely to be visited by different age groups;

- 20 to 29 years – Yasawa (53%), Nadi and Suncoast (32%)
- 40 to 49 years – Suva (21%)
- 50 to 59 years – Suva (23%) and Lautoka (21%)
- 60 years and over – Outer Islands (28%) and Lautoka (25%)

Chart 48: Q90 Age of visitors by Province

Base: 3,631



Base: All Visitors

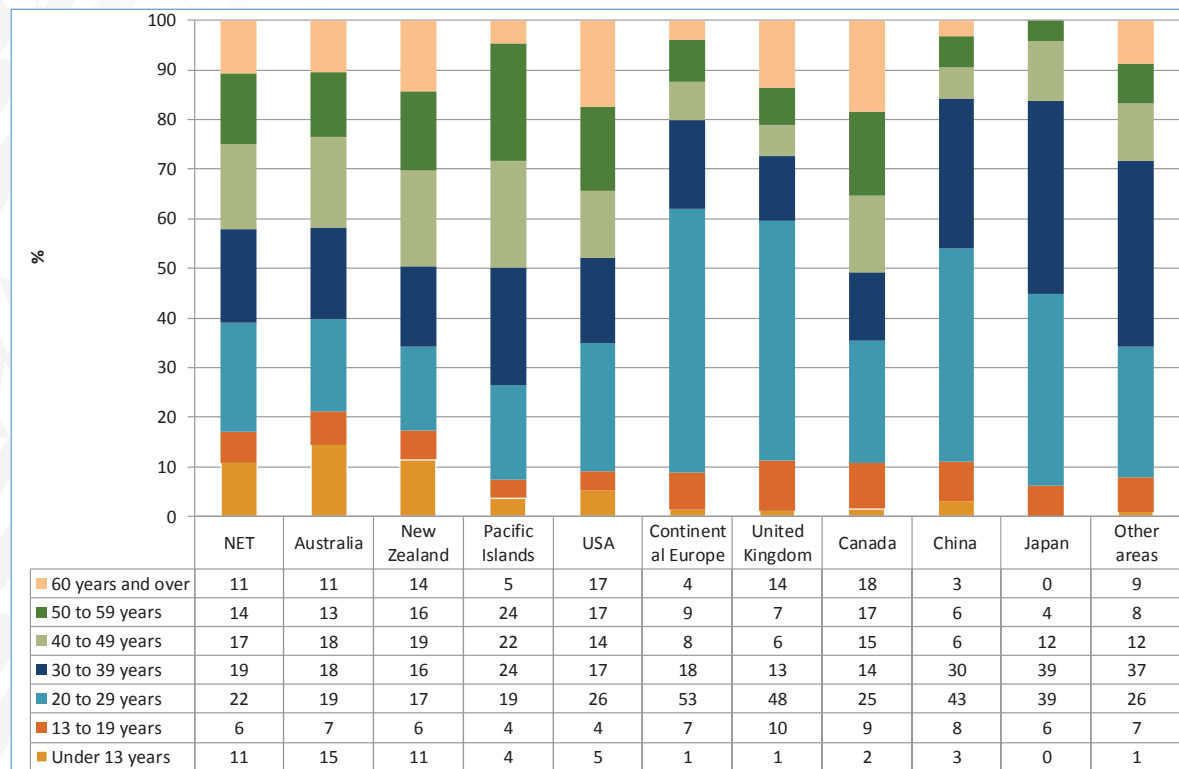
Provinces most likely to be visited by different age groups;

- 20 to 29 years – Serua (26%)
- 30 to 39 years – Cakaudrove (22%)
- 50 to 59 years – Rewa (25%)



Chart 49: Q90 Age of visitors by country and region of residence

Base: 3,613



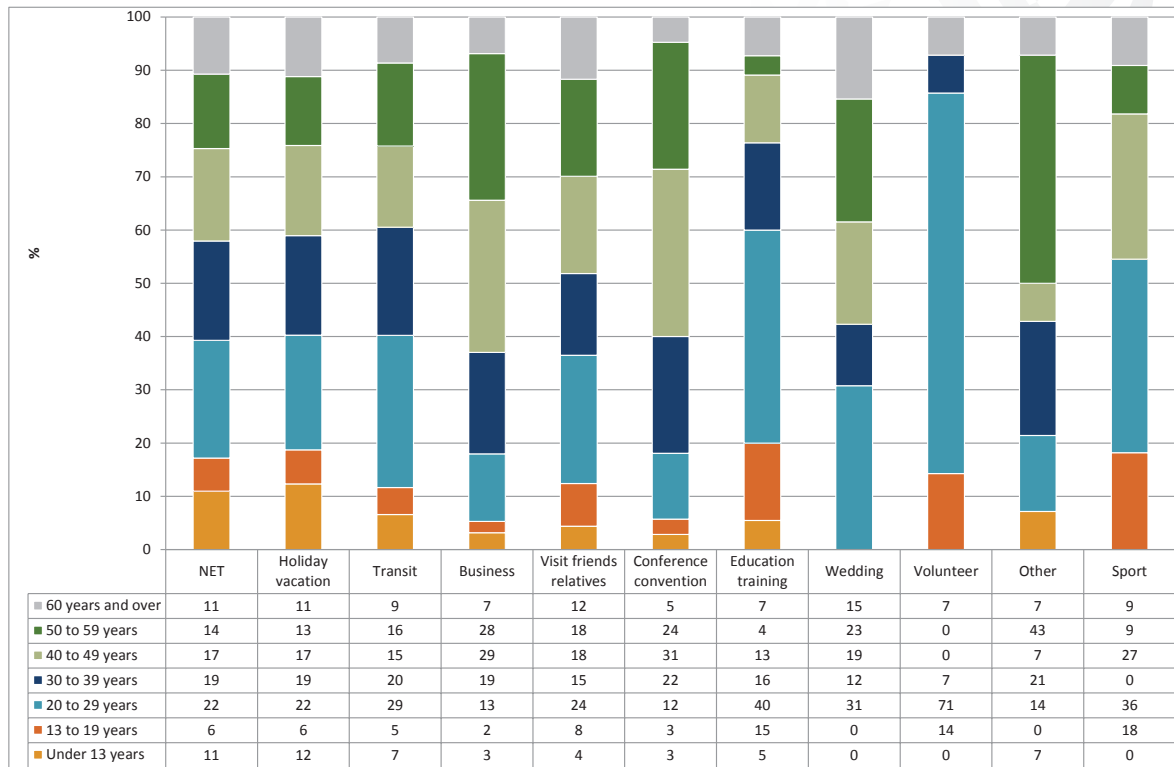
Base: All Visitors

Country and region of residence are most likely to come from these different age groups;

- Under 13 years – Australia (15%)
- 13 to 19 years – United Kingdom (10%)
- 20 to 29 years – Continental Europe (53%)
- 30 to 39 years – China (30%) and Japan (39%)
- 40 to 49 years – Pacific Islands (22%)
- 50 to 59 years – Pacific Islands (24%)

Chart 50: Q90 Age of visitors by Main Reason for Visit

Base: 3,631



Base: All Visitors

The following age groups are most likely to visit for;

- 20 to 29 years - volunteer (71%), education/training (40%) and sport (36%)
- 30 to 39 years - conference/convention (22%)
- 40 to 49 years - conference/convention (31%) and business (29%)
- 50 to 59 years - business (28%), conference/convention (24%) and wedding (23%)
- 60 years and over - wedding (15%) and visiting friends and relatives (12%)



## 7 ACCOMMODATION

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

- Method of booking accommodation
- Satisfaction with accommodation

More than half (53%) of visitors to Fiji book their accommodation through travel agents whereas forty percent (40%) choose direct booking methods including by phone, email or website.

While travel agents are still the primary source of booking accommodation, direct bookings have steadily increased over the last few years.

In the future, the IVS will report on bookings through new online aggregation services that are a growing section of the accommodation booking market (e.g. Expedia, Hotels.com).

Satisfaction with hotel accommodation has high ratings for:

- Courtesy of staff (index 93.3)
- Cleanliness of rooms (index 90.6)
- Accommodation facilities in general (index 89.8)

The two areas that have below average ratings are:

- Value for money (88.2)
- Quality of food (85.2)

Both of these 'lower' ratings need to be seen in the context that all hotel ratings are high and these are the only two with any level of dissatisfaction. Food has been an ongoing area for developments in hotels, however, the new IVS survey will have enhanced questions to better understand food issues in detail. In the current survey, the only option is 'quality of food' which may be a proxy for other food issues.

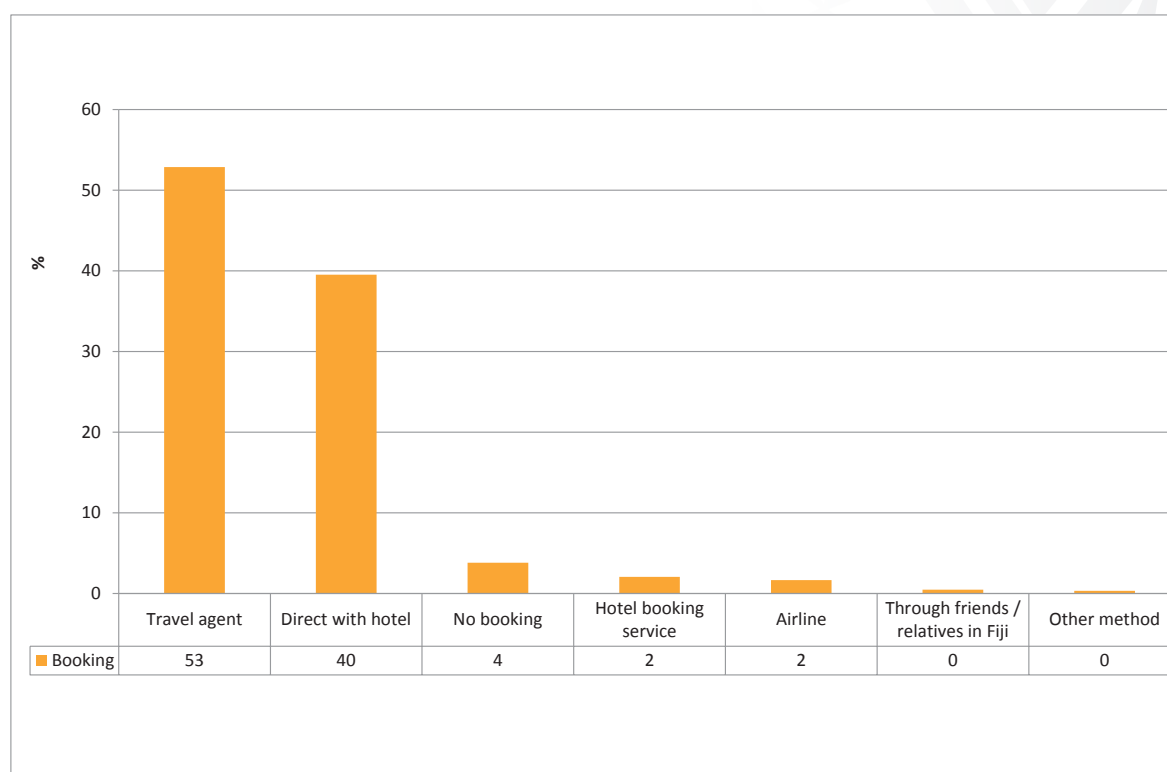




## 7.1 Method of booking accommodation

Chart 51: Q18 Method of booking

Base: 3,811



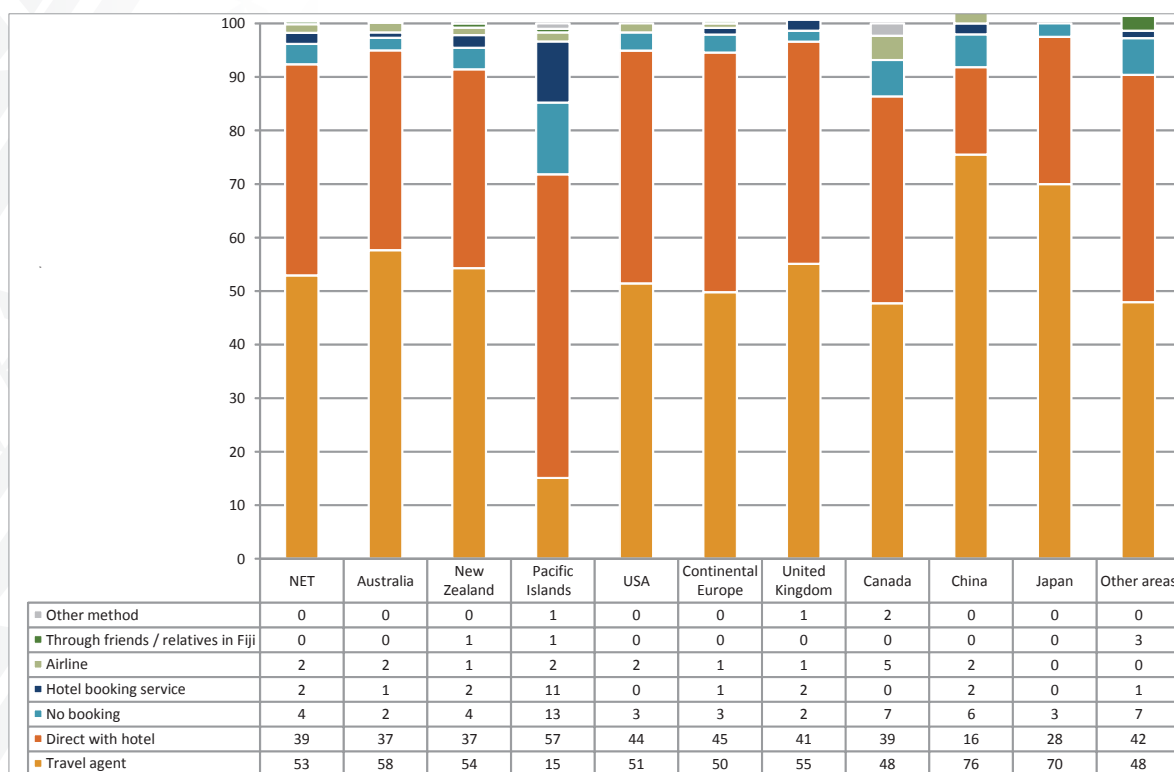
Base: Visitors in paid accommodation

Accommodation bookings through a travel agent are just over a half (53%) of all bookings. Forty percent (40%) book by direct contact with hotels.

Few (2%) use a hotel booking service, airline (2%) or do not have a booking (4%).

Chart 52: Q18 Method of booking by country and region of residence

Base: 3,783



Base: Visitors in paid accommodation

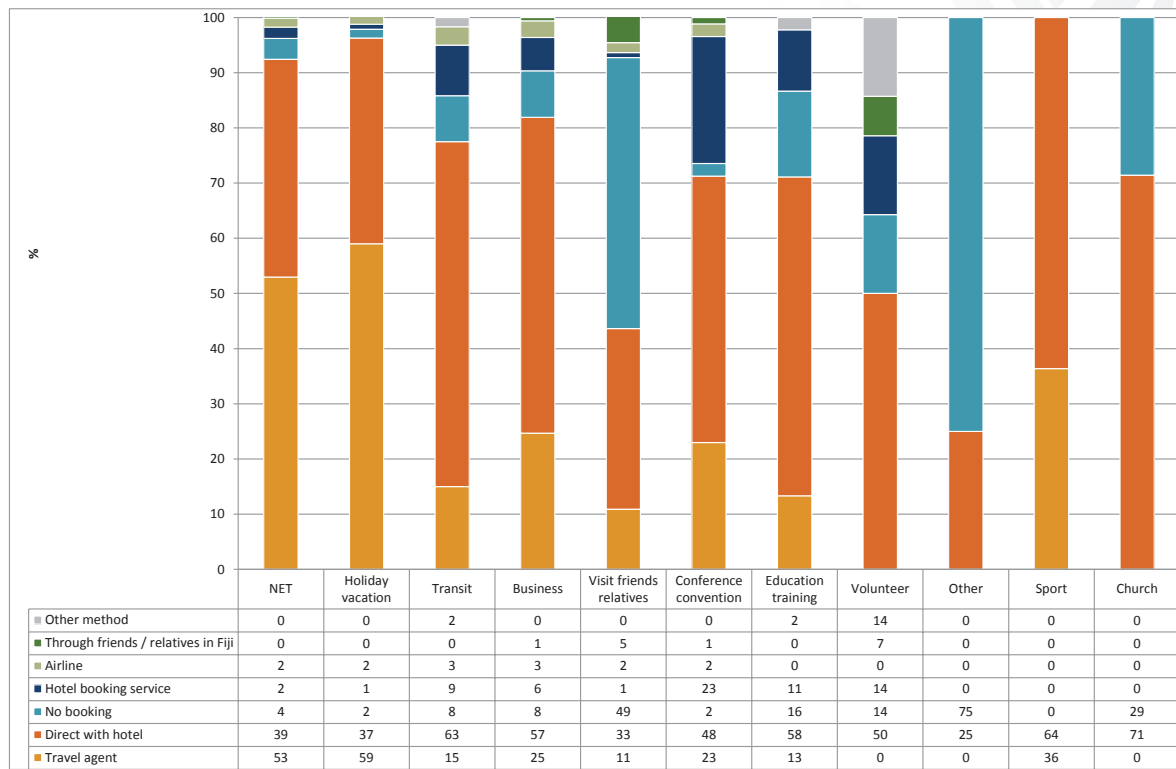
Visitors from China (76%), Japan (70%) and Australia (58%) are most likely to use a travel agent for bookings.

Visitors from Pacific Islands (57%), Continental Europe (45%) and USA (44%) are more likely to book directly with hotels.

Pacific Island visitors are also more likely to have no bookings (13%) or use a hotel booking service (11%).

**Chart 53: Q18 Method of booking accommodation by main reason for visit**

**Base: 3,794**



Base: Visitors in paid accommodation

Visitors travelling for ‘holiday/vacation’ are more likely to book through a travel agent (59%) whereas thirty-seven percent (37%) in this group also book their accommodation directly with hotels.

Booking directly with hotels is more likely for those traveling for:

- Church (71%)
- Sport (64%)
- Transit (63%)

**Differences by Province**

Booking using a travel agent is higher for Nadroga/Navosa (66%) whereas direct bookings are higher for:

- Rewa (56%)
- Serua (50%)
- Ba (44%)

### Differences by Tourism Area

Bookings through travel agents are higher for:

- Mamanuca (68%)
- Coral Coast (66%)
- Denarau (58%)

Booking direct with hotels is higher for:

- Suva (57%)
- Nadi (50%)

## 7.2 Satisfaction with accommodation

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

This has been treated in two ways, ratings have been grouped as:

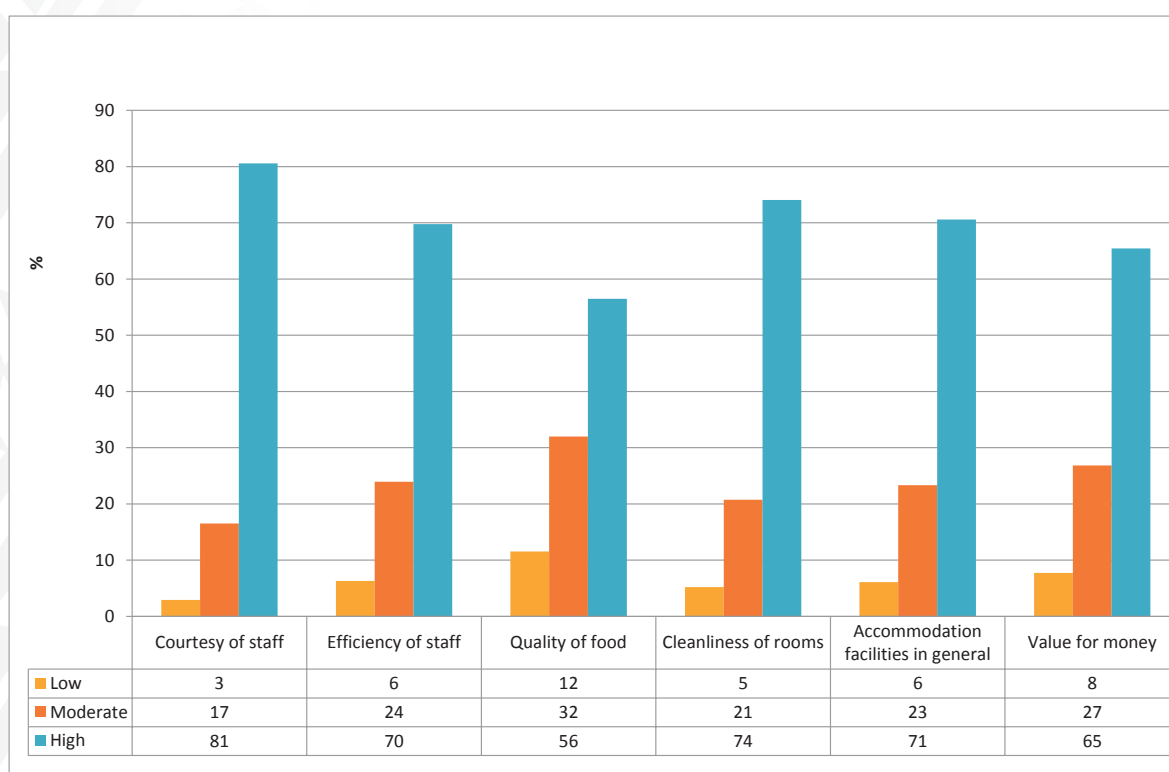
- 0 to 6 = low
- 7/8 = moderate
- 9/10 = high

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



Chart 54: Q39 Satisfaction with accommodation

Base: 4,337



Base: All visitors in paid accommodation  
 NB: 'Don't know' has been excluded

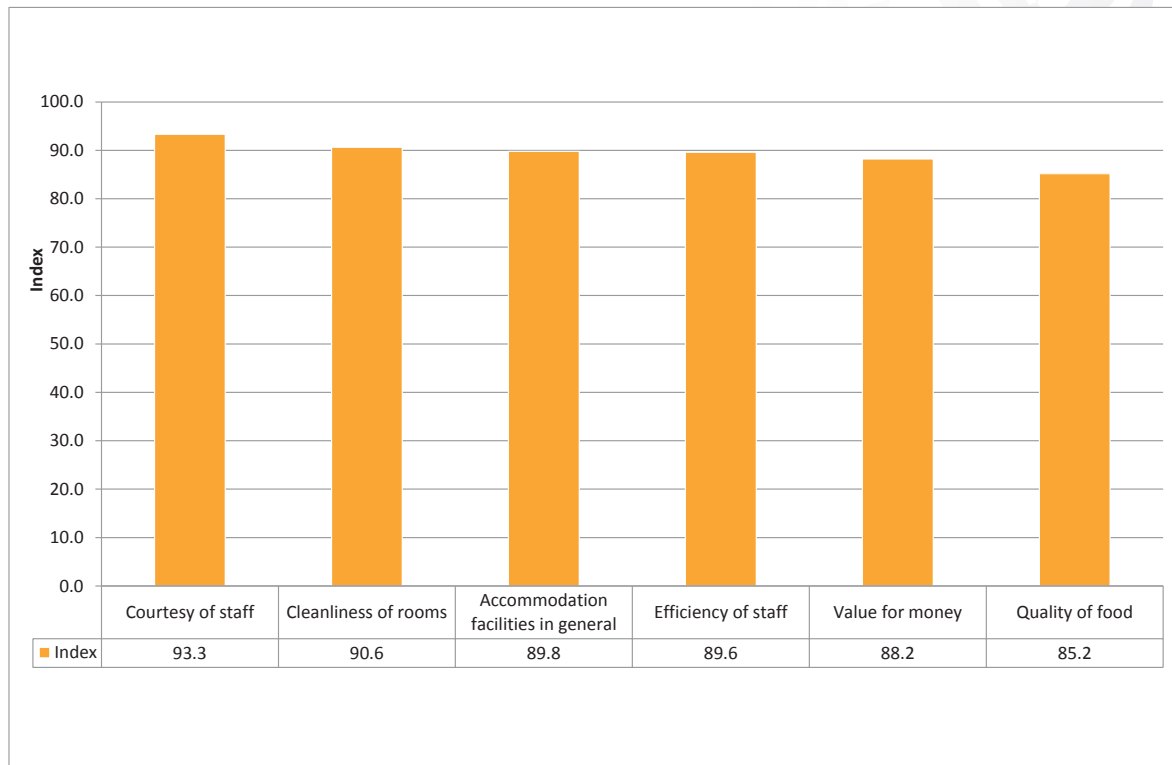
It can be noted that courtesy of staff (81%) is the most favourable contributing factor towards satisfaction with the hotel where the most number of nights was spent.

Quality of food has been an issue in past IVS reports and this is noticeably lower in the 2014 report. However, only twelve percent (12%) rate quality of food as 'low'. Over half (56%) rate the quality of food as 'high' while almost one-third (32%) rate it as 'moderate'

Analysis of 'unfavourable impressions' show that there are multiple potential issues with food and 'quality of food' may be a proxy for lower satisfaction in a range of other areas. The only option for food in the current survey is the quality and this will be addressed in the revised IVS survey that will allow a thorough analysis for all aspects of food.

**Chart 55: Q39 Satisfaction with accommodation (index)**

**Base: 4,337**



Base: All visitors in paid accommodation

Converting the ratings to an index shows that there is overall little difference in satisfaction.

Above the average are:

- Courtesy of staff (93.3)
- Cleanliness of rooms (90.6)
- Accommodation facilities in general (89.8)

Efficiency of staff is on average (89.6).

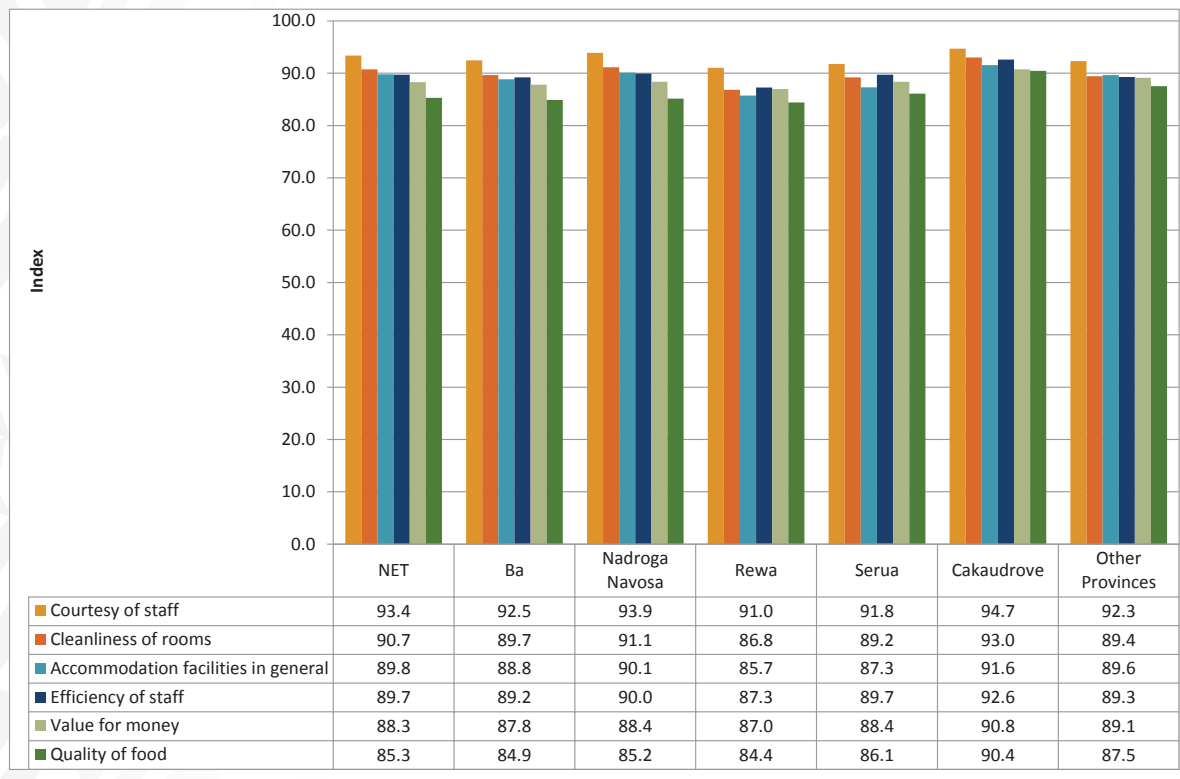
Below average are:

- Value for money (88.2)
- Quality of food (85.2)

All of these scores are relatively high and none can be considered a poor rating.

Chart 56: Q39 Satisfaction with accommodation (index) by Province

Base: 3,486



Base: All visitors

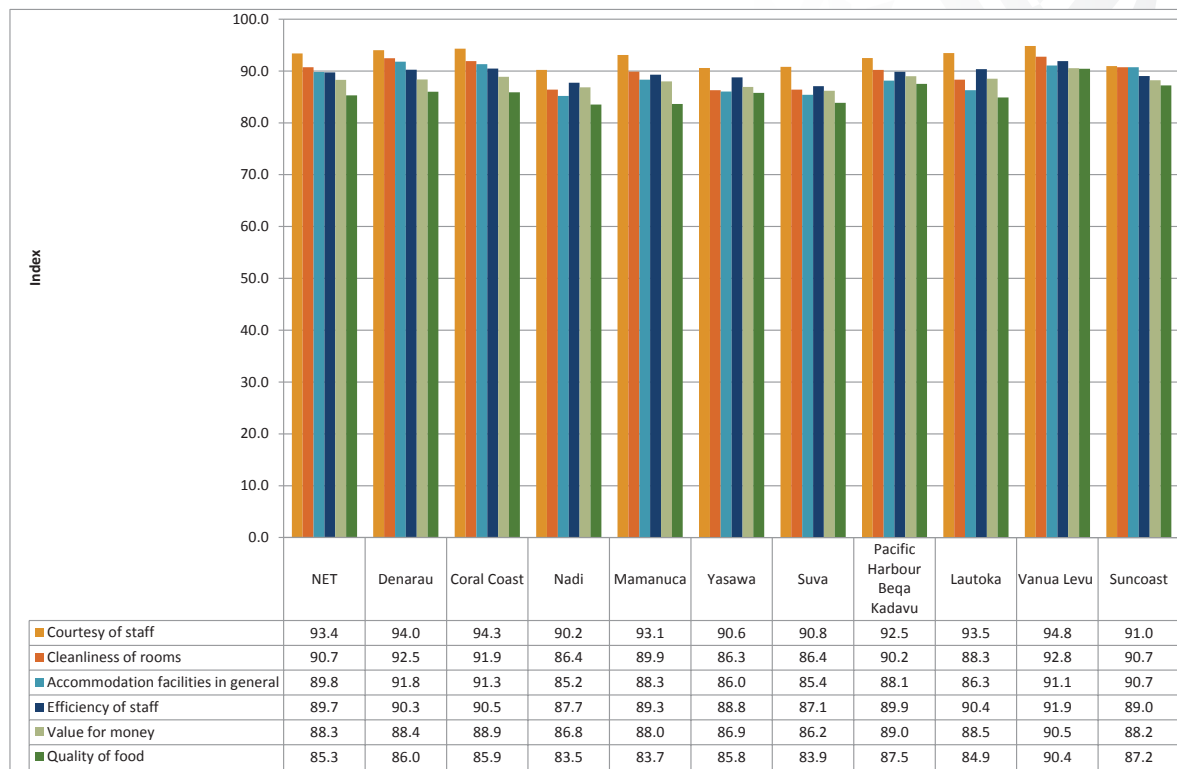
Visitors have given a higher rating for all aspects of accommodation for the Province of Cakaudrove.





**Chart 57: Q39 Satisfaction with accommodation (index) by Tourism Area**

**Base: 3,486**



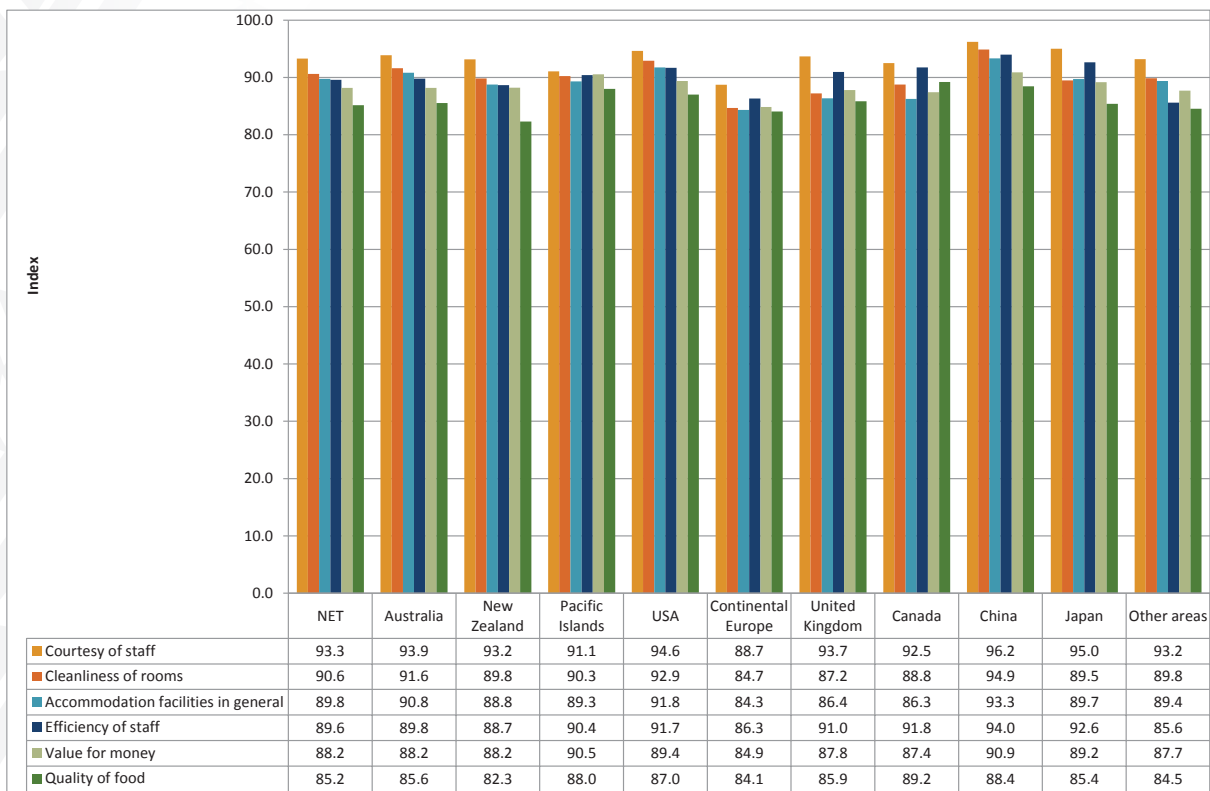
Base: All visitors

Satisfaction with accommodation varies by Tourism Area as follows:

- Courtesy of staff - Vanua Levu (94.8), Denarau (94.0) and Coral Coast (94.3)
- Cleanliness of rooms - Vanua Levu (92.8), Denarau (92.5) and Coral Coast (91.9)
- Accommodation facilities in general - Denarau (91.8), Coral Coast (91.3) and Vanua Levu (91.1)

Chart 58: Q39 Satisfaction with accommodation (index) by Country and Region of Residence

Base: 3,598

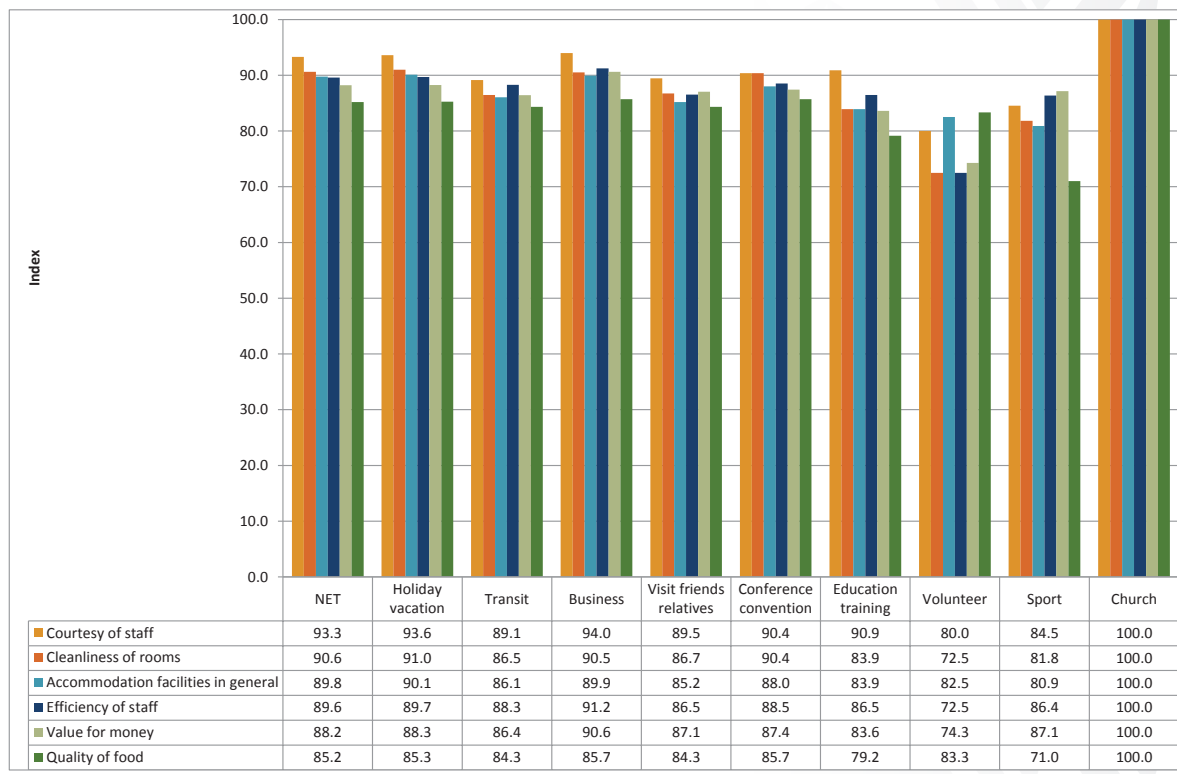


Base: All visitors

Visitors from the following country and region of residence gave higher ratings for:

- Courtesy of staff - China (96.2), Japan (95.0) and USA (94.6)
- Cleanliness of rooms - China (94.9), USA (92.9) and Australia (91.6)
- Accommodation facilities in general - China (93.3), USA (91.8) and Australia (90.8)

**Chart 59: Q39 Satisfaction with accommodation (index) by Main Reason for Visit** Base: 3,608



Higher satisfaction with accommodation varies by main reason for visit as follows:

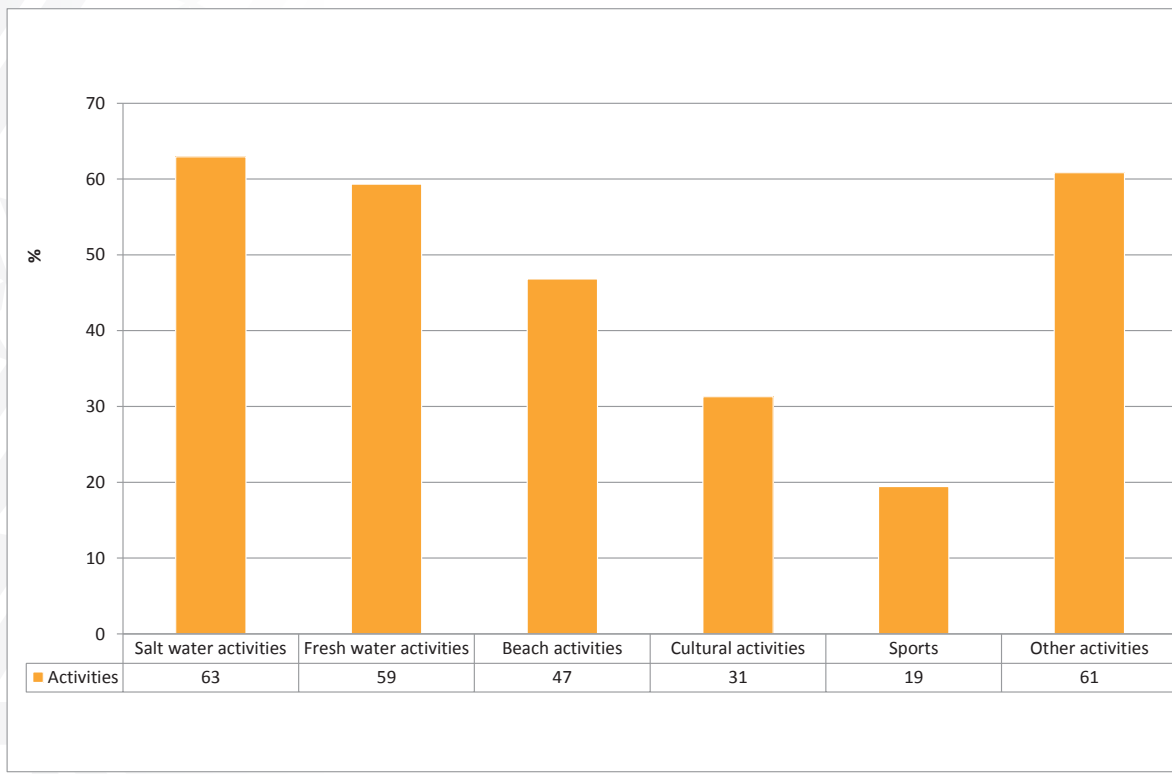
- Courtesy of staff - Church (100), Business (94.0) and Holiday/vacation (93.6)
- Cleanliness of rooms - Church (100), Holiday/vacation (91.0) and Business (90.5)
- Accommodation facilities in general - Church (100), Holiday/vacation (90.0) and Business (89.9)

## 8 ACTIVITIES

### 8.1 Activities carried out while in Fiji

Chart 60: Q52 Activities carried out in Fiji

Base: 4,337



Base: All visitors

Fiji offers a wide range of activities that a majority of visitors (84%) take part in. All visitors to Fiji for a 'holiday/vacation' took part in an activity.



**Table 21: Q52 Activities carried out while in Fiji**

**Base: 4,337**

	%
Swimming - fresh water	62
Swimming - salt water	60
Laying on poolside	58
Snorkelling	51
Laying on beach	45
Shopping	39
Beach walking	35
Massage/spa	33
Kava drinking/ceremony	27
Canoeing/kayaking	22
Village visit/tour	16
Walking	13
Scuba Diving	9
Other	9
Meke	9
Dancing/night club	7
Beach volleyball	7
Hair braiding	6
Firewalking	6
Boat ride	5
Reading	5
Golf	4
Manicure/facial	4
Jet ski	4
Surfing	3
Sailing/Yachting	3
Bushwalking/hiking	3
Other fishing	3
Weaving	3
Coral viewing	3
Crab race/frog race	3
Pool games	3

	%
Tennis	2
Fish feeding	2
Church service	2
Deep/big game fishing	2
Gym	2
Choir/concert	2
Cultural centre/Fort, etc.	2
Jet boat	1
Babysitting	1
Volleyball	1
Parasailing	1
Reef walking	1
Cinema	1
Horse riding	1
Museum visit	1
Running/jogging	1
Football/rugby	1
Bike riding/cycling	1
Jet boat fresh water	1
Banana boat	1
Dolphin watching	1
Pool/billiards	1
Wind surfing	0
Bird watching	0
Rafting/Bilibili - fresh water	0
Canoeing/kayaking - fresh water	0
Boat ride - fresh water	0
Fishing	0
Bowls	0
Squash	0
Sky diving	0
Water skiing	0
Motor bike riding	0

The most popular activities are swimming, either in salt water (60%) or fresh water (62%).

Other key activities are:

- Laying by poolside (58%)
- Snorkelling (51%)
- Laying on the beach (45%)
- Shopping (39%)
- Beach walking (35%)
- Massage/spa (33%)
- Kava drinking/kava ceremony (27%)
- Canoeing/kayaking (22%)
- Village visit/tour (16%)
- Walking (13%)

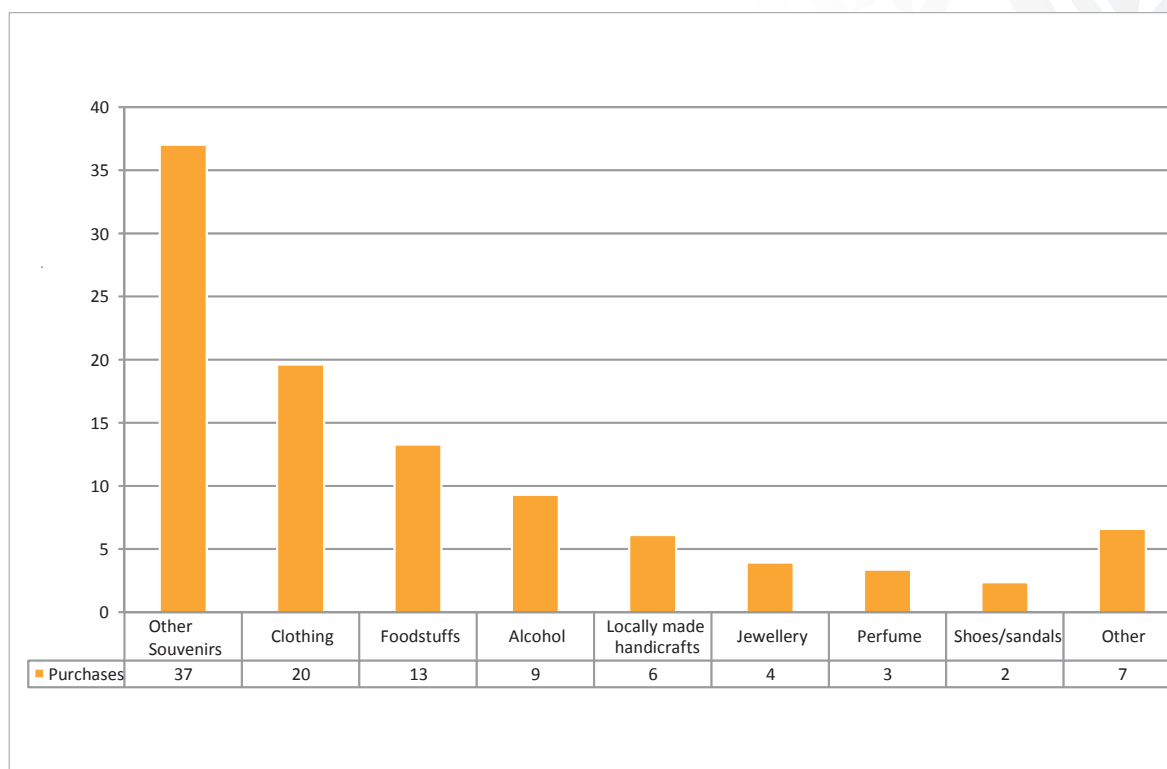


## 8.2 Purchases made in Fiji

Eighty-two percent (82%) of visitors made purchases while in Fiji including items purchased at Nadi International Airport. This is higher than the number of people who listed 'shopping' as an activity as it includes incidental purchases not thought of as a 'shopping activity'.

**Chart 61: Q78 Purchases made in Fiji**

**Base: 4,337**



Base: All visitors who made purchases in Fiji

The most common purchase in Fiji is 'other souvenirs' (37%) followed by:

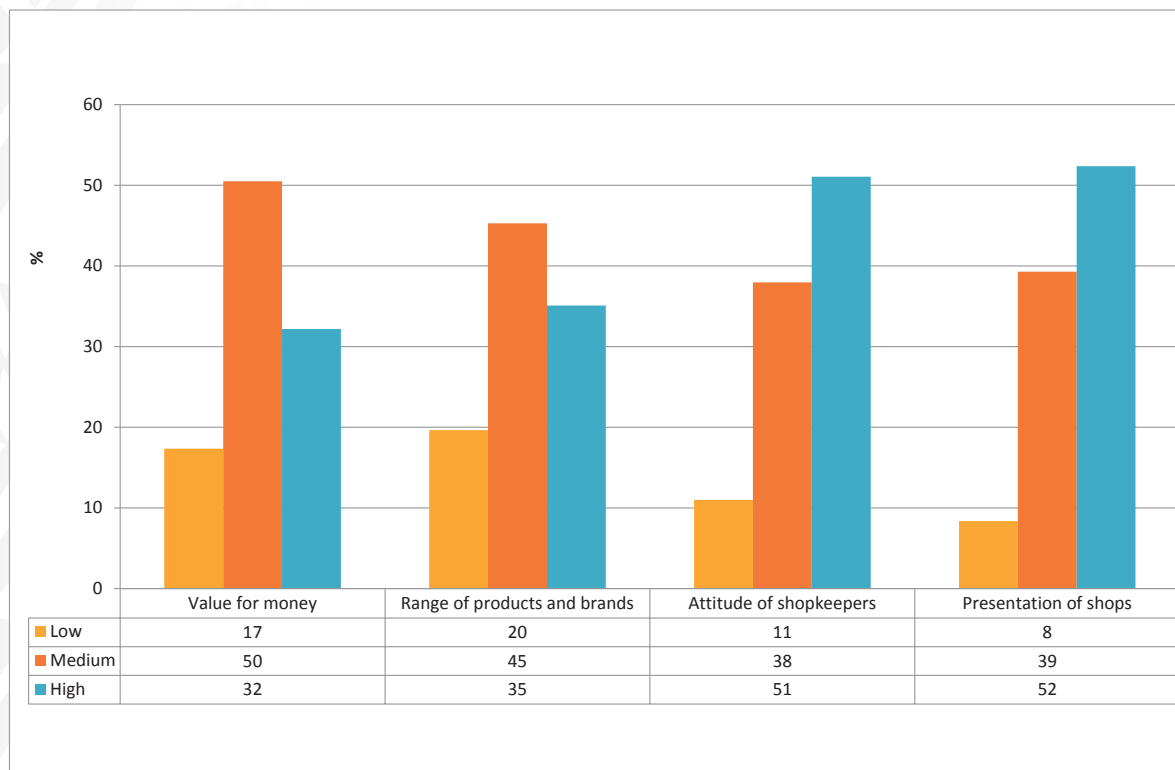
- Clothing (20%)
- Foodstuffs (13%)

Purchases made by less than one percent (1%) of visitors classified in Chart 61 as 'other' include:

- Cigarettes/tobacco
- Handbags/wallets
- Books/stationery
- Watches/clocks
- Toys/games
- Music/videos (CD/DVD etc.)
- Cameras & camera equipment
- Suitcases/travel bags
- Materials/textiles
- Paintings
- Film/processing/printing

Chart 62: Q79 Rating of shopping (grouped)

Base: 4,337



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

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

These have been grouped into:

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

Categories with higher ratings are:

- Presentation of shops (52%)
- Attitude of shopkeepers (51%)

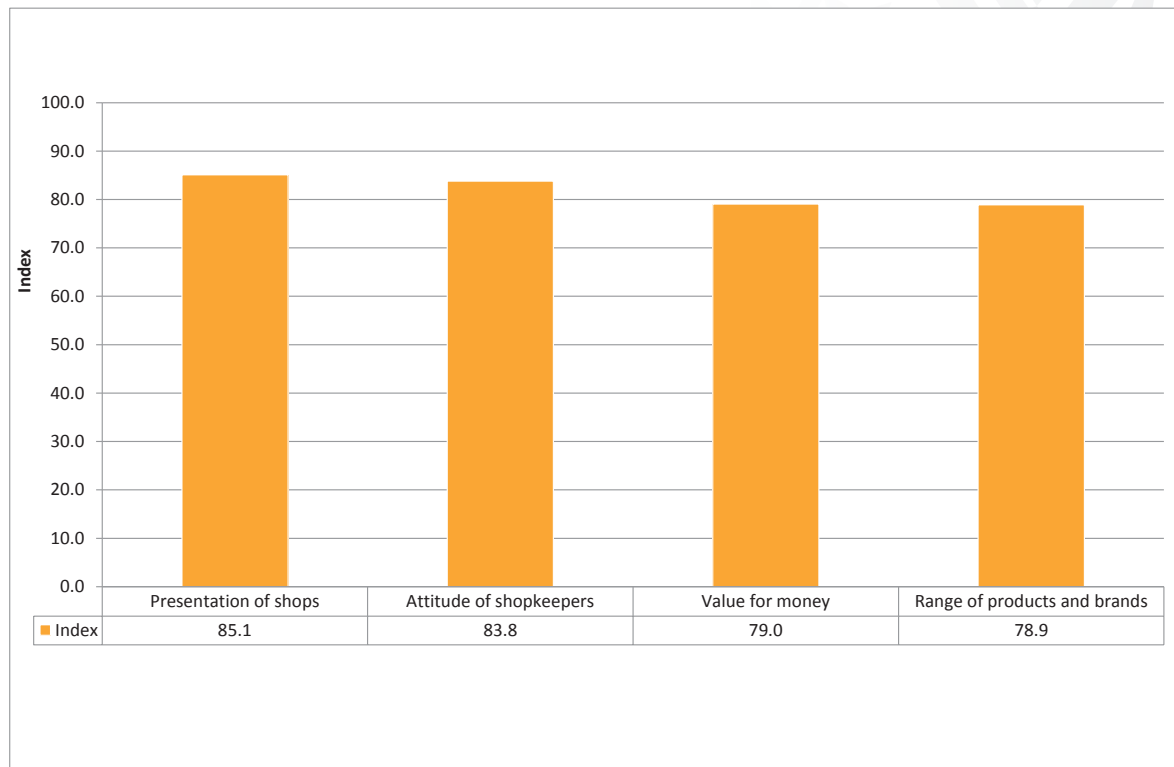
'Value for money' (17%) and 'range of products and services' (20%) had higher 'low' ratings.





Chart 63: Q79 Rating of shopping (index)

Base: 4,337



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

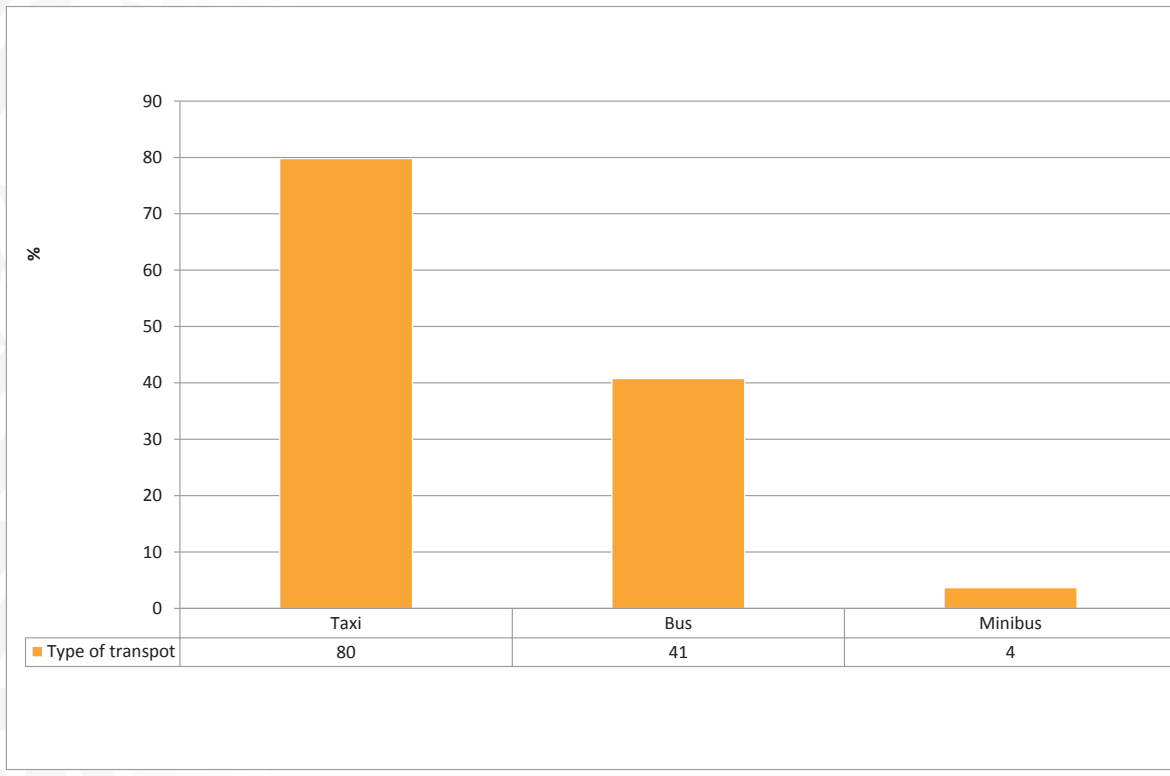
Converting the rating to an index (score out of 100) shows an overall high satisfaction with shopping in Fiji.

### 8.3 Use of public transport in Fiji

Forty-nine percent (49%) of visitors took public transport while in Fiji.

**Chart 64: Q50 Public transport used in Fiji**

**Base: 1,850**



Of the forty-nine percent (49%) of visitors who took public transport in Fiji, eighty percent (80%) used a taxi, forty-one percent (41%) a bus and four percent (4%) a minibus.

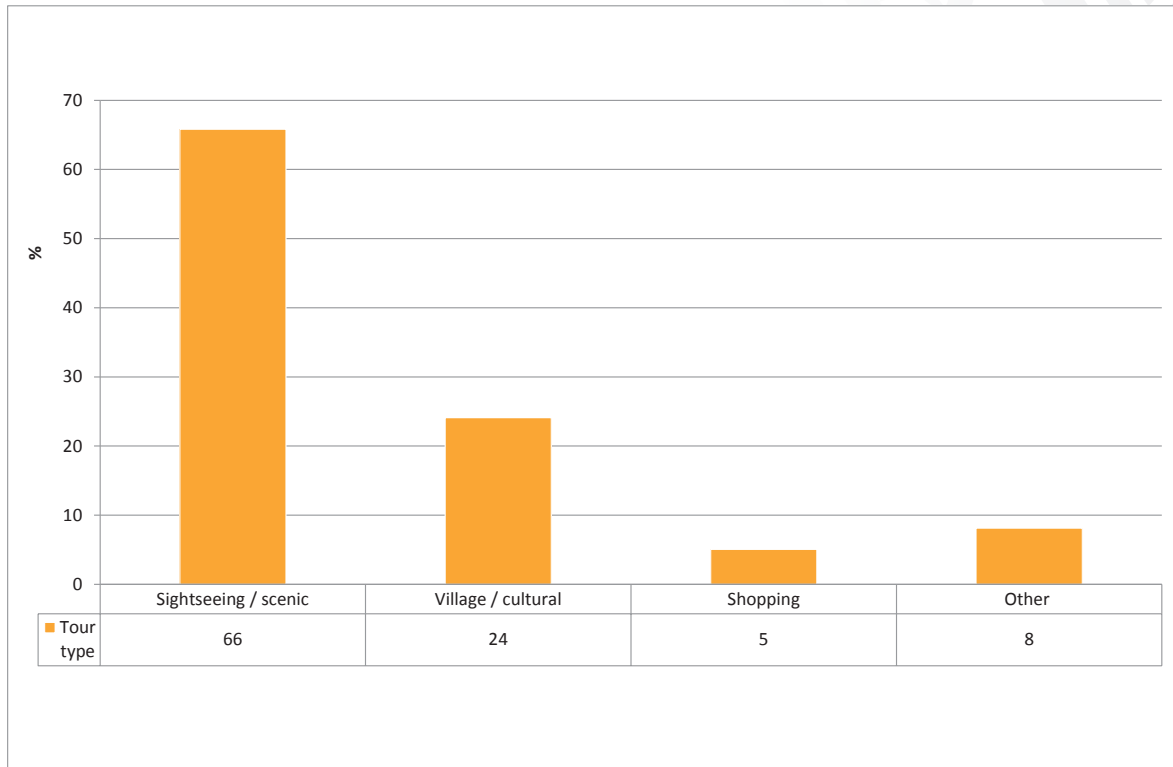
## 8.4 Organised tours

Of all visitors to Fiji, ten percent (10%) took an organised tour whereas for visitors on 'holiday/vacation', twelve percent (12%) took an organised tour.

On average visitors took 1.1 organised tours.

**Chart 65: Q57 Type of organised tour**

**Base: 357**



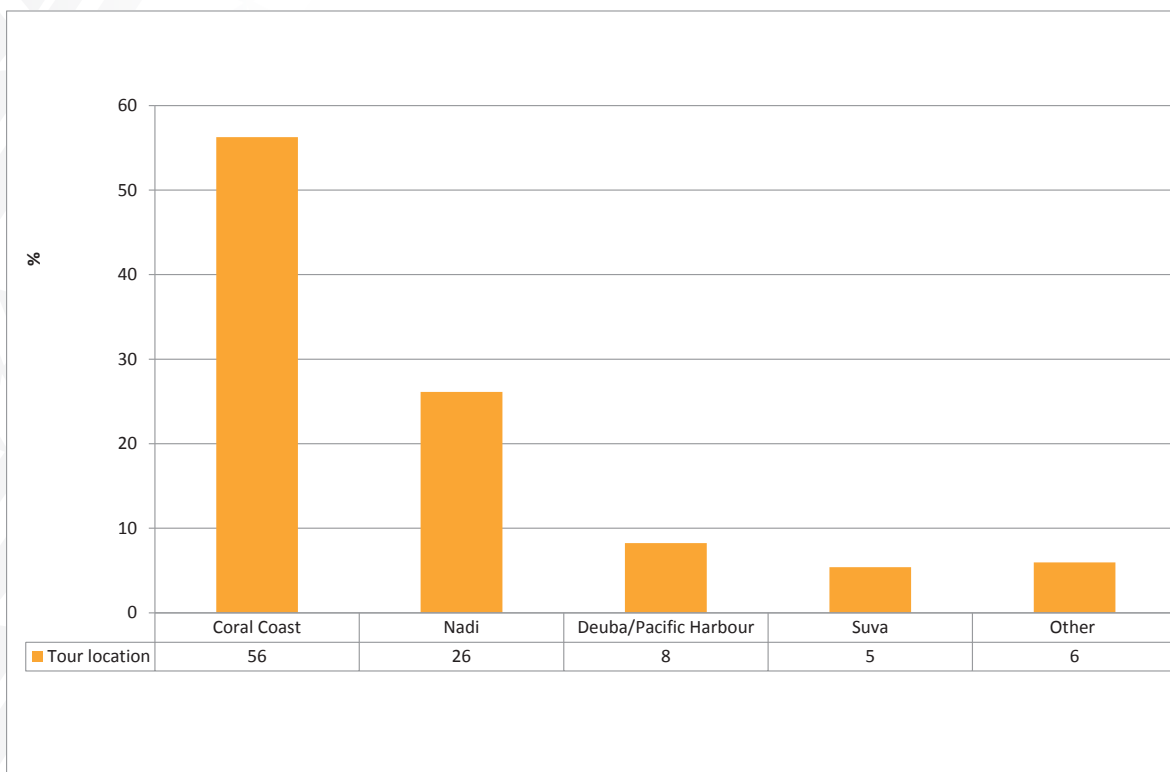
Base: All visitors who took an organised tour

The main type of organised tour taken was 'sightseeing/scenic' (66%) followed by 'village/cultural' (24%) and 'shopping' (5%).



Chart 66: Q58 Location of tour

Base: 352



Base: All visitors who took an organised tour

Over half (56%) of tours were on the Coral Coast, twenty-six percent (26%) in Nadi, eight percent (8%) in Deuba/Pacific Harbour and five percent (5%) in Suva.

Other locations (less than 1% of tours) are:

- Taveuni/islands off Taveuni
- Lautoka
- Mamanuca Islands
- Nausori/Tailevu
- Rakiraki
- Lau
- Around the island

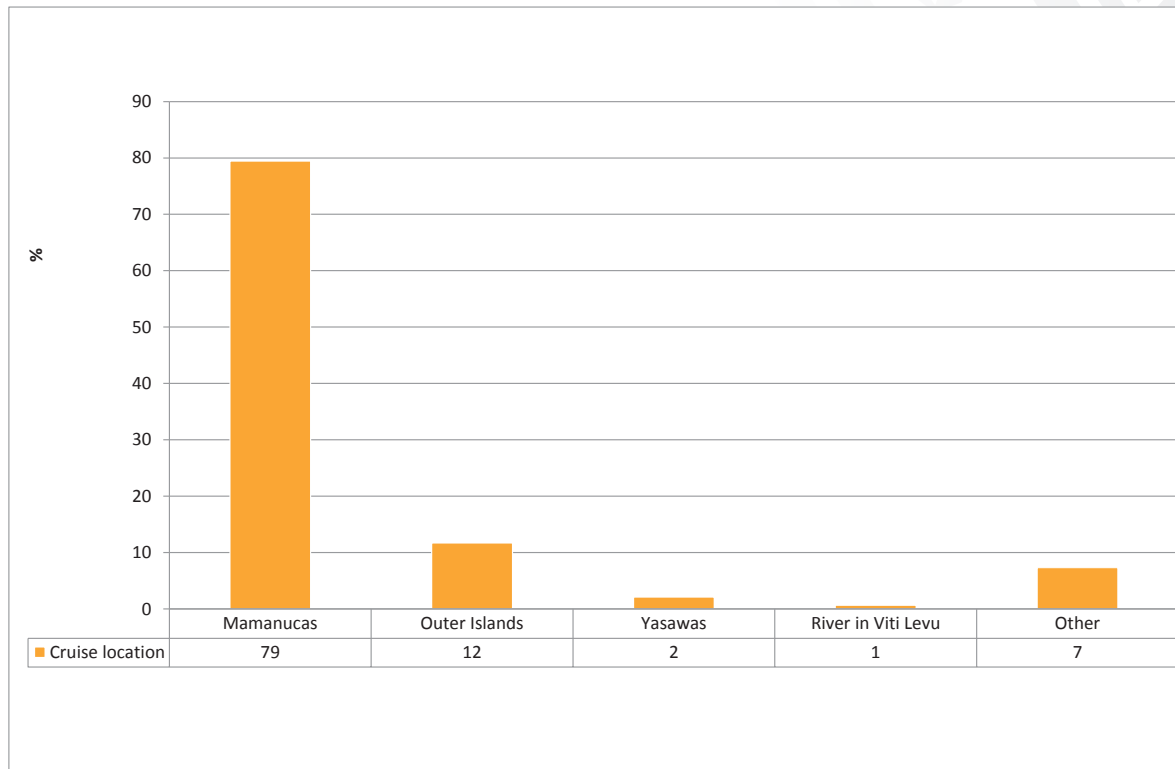
## 8.5 Organised cruises

Of all visitors to Fiji, twenty-seven percent (27%) took an organised cruise, whereas for visitors on 'holiday/vacation' thirty percent (30%) took an organised cruise.

Visitors took an average 1.1 organised cruises.

**Chart 67: Q66 Area of cruise**

**Base: 958**



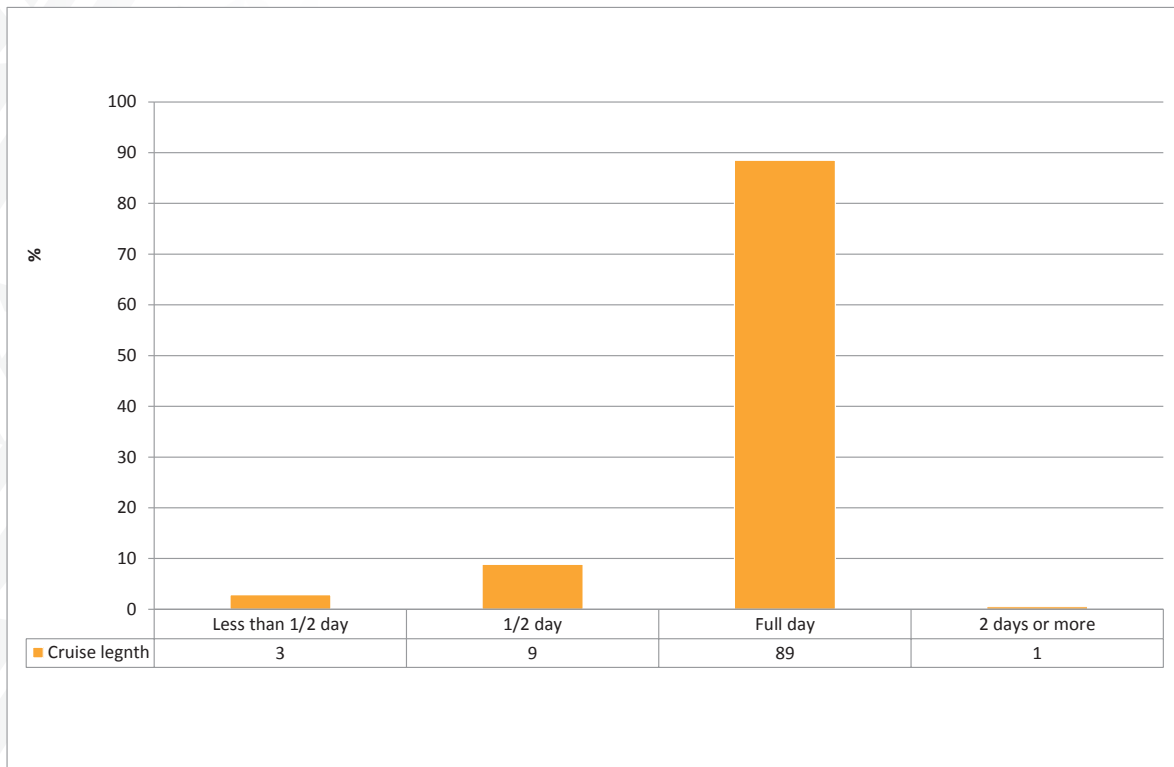
Base: All visitors who took an organised cruise

Seventy-nine percent (79%) of cruises were in Mamanuca Islands, twelve percent (12%) were in the outer islands and two percent (2%) in Yasawa Islands.



Chart 68: Q67 Length of cruise

Base: 948



Base: All visitors who took an organised cruise

Most cruises lasted for one day (89%) whereas only three percent (3%) were less than half a day and nine percent (9%) were a half day cruise.

## 8.6 Air travel in Fiji

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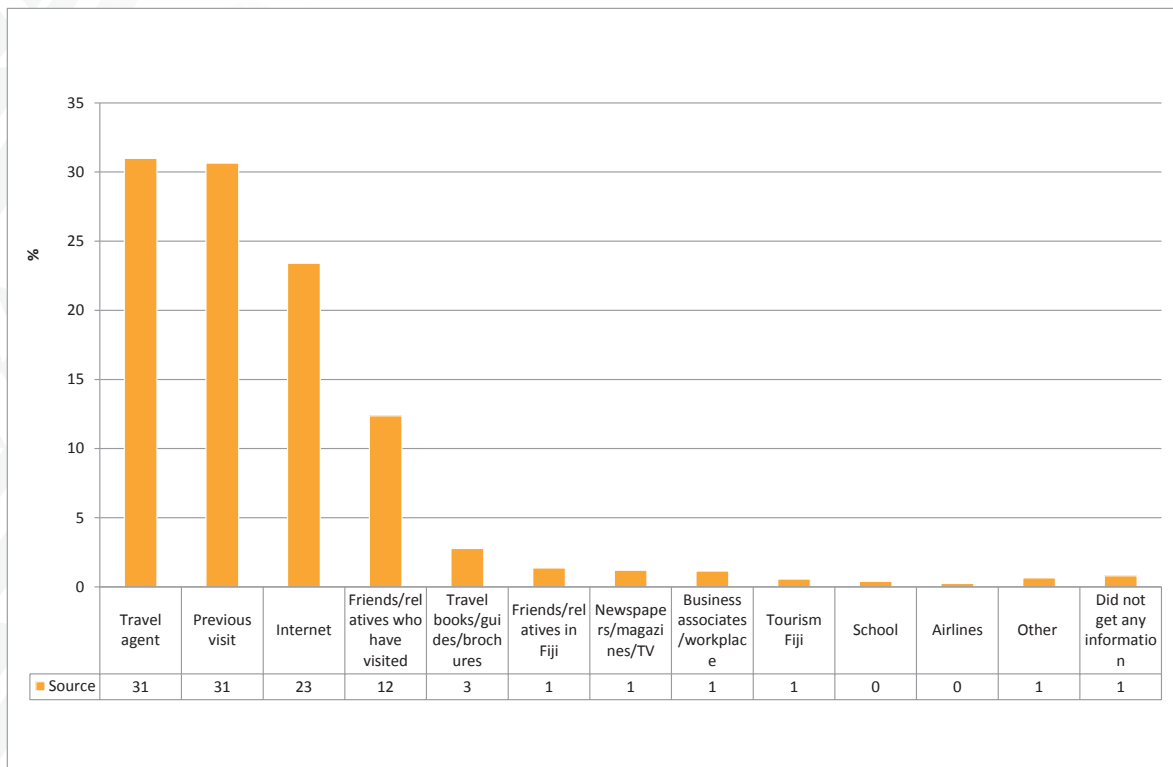
Three percent of visitors (3%) took additional air travel while in Fiji with an average of 1.1 flights taken. Sixty-two percent (62%) were return flights and thirty-eight percent (38%) were one-way flights.



## 9 INFORMATION SOURCES

Chart 70: Q19 Information sources about Fiji

Base: 3,744



Base: All visitors

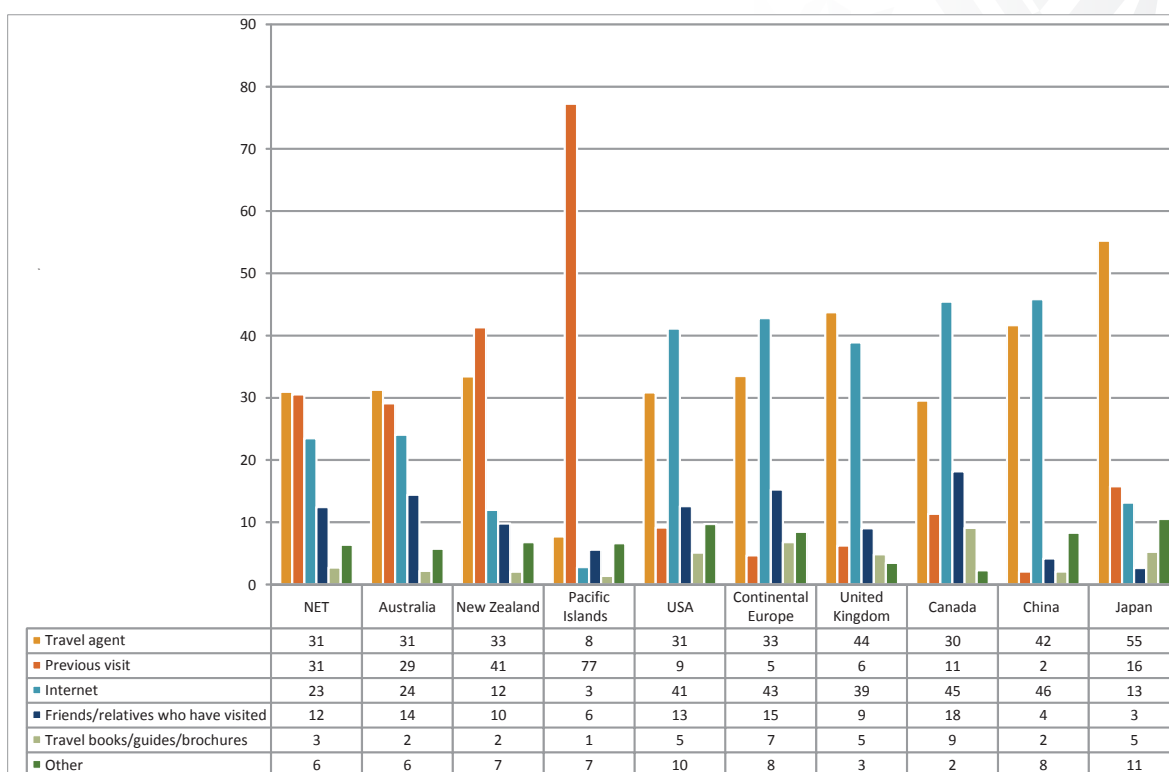
There are three key sources of information in planning a visit to Fiji, which are:

- Travel agent (31%)
- Previous visit (31%)
- Internet (23%)



Chart 71: Q19 Information sources by country and region of residence

Base: 3,716



Base: All visitors

Information from travel agents is highest for visitors from:

- Japan (55%)
- United Kingdom (44%)

Information from previous visits is higher for visitors from:

- Pacific Islands (77%)
- New Zealand (41%)

Information from internet is higher for visitors from:

- China (46%)
- Canada (45%)
- Continental Europe (43%)
- USA (41%)

## 10 EXPENDITURE DATA (DETAILED TABLES)

Table 22: Estimated total spend by Province

Province	Net	Ba	Nadroga Navosa	Rewa	Serua	Cakaudrove	Other Provinces	Unspecified
Total package and pre-paid	\$1,109,908,551	\$469,761,816	\$467,309,082	\$47,406,915	\$29,090,781	\$40,992,200	\$24,193,773	\$29,982,677
Additional accommodation	\$18,425,910	\$11,555,716	\$6,855,382	\$2,308,407	\$369,674	\$1,140,464	\$591,162	\$2,063,656
Additional food and drinks	\$132,229,213	\$64,455,815	\$74,470,786	\$2,898,914	\$3,112,569	\$2,908,053	\$1,737,181	\$2,622,229
Additional expenditure	\$61,159,423	\$30,218,552	\$36,969,827	\$2,253,140	\$2,311,778	\$1,420,909	\$1,071,215	\$774,294
<b>Total hotel</b>	<b>\$1,321,723,096</b>	<b>\$575,991,900</b>	<b>\$585,605,076</b>	<b>\$54,867,376</b>	<b>\$34,884,801</b>	<b>\$46,461,626</b>	<b>\$27,593,331</b>	<b>\$35,442,856</b>
Transfers	\$2,307,875	\$1,367,560	\$1,122,311	\$278,742	\$101,773	\$175,673	\$110,970	\$197,621
Non-hotel F&B	\$39,140,977	\$28,095,516	\$10,078,038	\$2,685,840	\$1,375,072	\$1,140,648	\$558,686	\$3,236,968
Retail	\$75,926,813	\$40,864,700	\$39,183,341	\$4,244,501	\$2,526,882	\$1,640,094	\$2,610,079	\$4,369,691
Activities	\$37,831,933	\$22,179,536	\$18,975,903	\$1,560,764	\$1,308,502	\$2,497,658	\$886,706	\$1,182,800
Tours	\$5,906,688	\$2,338,658	\$3,819,585	\$128,972	\$332,117	\$135,338	\$20,550	\$63,368
Cruises	\$18,678,382	\$12,537,083	\$7,047,025	\$241,117	\$285,759	\$86,754	\$87,596	\$407,188
Rental cars	\$3,692,682	\$2,445,448	\$1,545,203	\$734,331	\$304,385	\$86,766	\$236,059	\$383,918
Public transport	\$7,240,280	\$4,479,540	\$2,844,487	\$653,576	\$279,708	\$411,043	\$178,212	\$573,865
<b>TOTAL EXPENDITURE</b>	<b>\$1,512,448,727</b>	<b>\$690,299,941</b>	<b>\$670,220,970</b>	<b>\$65,395,219</b>	<b>\$41,399,001</b>	<b>\$52,635,598</b>	<b>\$32,282,188</b>	<b>\$45,858,274</b>

**Table 23: Estimated total spend by Tourism Area**

Tourism area	Net	Denarau	Coral Coast	Nadi	Mamanuca	Yasawa	Suva	Pacific Harbour/ Beqa/ Kadavu	Lautoka	Vanua Levu	Suncoast	Outer Islands	Un-specified
Total package and pre-paid	\$1,109,908,551	\$270,012,751	\$222,859,391	\$159,395,746	\$194,771,390	\$66,536,563	\$42,396,122	\$37,861,575	\$37,829,190	\$36,630,132	\$9,443,651	\$1,772,849	\$26,452,881
Additional accommodation	\$18,425,910	\$7,170,113	\$4,404,742	\$4,580,016	\$1,818,987	\$1,800,126	\$2,106,976	\$446,354	\$580,555	\$1,257,498	\$396,079	\$189,667	\$2,061,225
Additional food and drinks	\$132,229,213	\$51,756,614	\$44,330,250	\$14,310,819	\$27,090,425	\$5,043,416	\$3,166,894	\$3,875,217	\$3,398,177	\$2,919,794	\$696,501	\$404,506	\$2,534,558
Additional expenditure	\$61,159,423	\$18,024,723	\$18,872,180	\$8,878,462	\$17,871,715	\$7,148,620	\$2,135,107	\$2,903,055	\$2,338,156	\$1,541,400	\$654,502	\$314,515	\$710,581
<b>Total hotel</b>	<b>\$1,321,723,096</b>	<b>\$346,964,202</b>	<b>\$290,466,562</b>	<b>\$187,165,044</b>	<b>\$241,552,517</b>	<b>\$80,528,726</b>	<b>\$49,805,099</b>	<b>\$45,086,201</b>	<b>\$44,146,078</b>	<b>\$42,348,824</b>	<b>\$11,190,732</b>	<b>\$2,681,536</b>	<b>\$31,759,244</b>
Transfers	\$4,069,639	\$1,108,633	\$909,190	\$1,411,137	\$1,061,957	\$778,332	\$562,725	\$173,762	\$156,792	\$297,730	\$127,028	\$50,642	\$366,206
Non-hotel F&B	\$39,140,977	\$23,496,600	\$4,484,332	\$6,037,564	\$3,322,308	\$1,023,086	\$2,782,144	\$1,404,680	\$2,152,646	\$1,181,781	\$293,259	\$107,938	\$3,056,491
Retail	\$75,926,813	\$34,133,402	\$18,194,894	\$14,541,241	\$12,992,444	\$3,709,884	\$4,441,532	\$2,991,843	\$2,745,409	\$1,666,202	\$585,107	\$1,066,760	\$4,304,215
Activities	\$37,831,933	\$16,298,478	\$10,612,791	\$6,230,414	\$8,105,999	\$3,157,535	\$1,028,516	\$2,044,837	\$1,230,612	\$2,547,328	\$430,217	\$53,936	\$1,130,049
Tours	\$5,906,688	\$1,878,403	\$3,395,785	\$603,960	\$468,954	\$312,249	\$104,202	\$332,117	\$108,745	\$105,447	\$17,436	\$0	\$43,590
Cruises	\$18,678,382	\$10,782,767	\$4,905,778	\$2,663,256	\$1,229,869	\$178,159	\$330,001	\$292,748	\$609,568	\$86,754	\$74,311	\$0	\$407,188
Rental cars	\$3,692,682	\$986,862	\$1,382,819	\$1,391,948	\$222,791	\$175,358	\$695,232	\$307,767	\$272,914	\$116,656	\$236,059	\$0	\$383,918
Public transport	\$7,240,280	\$2,725,974	\$2,068,892	\$1,841,483	\$733,915	\$433,152	\$678,622	\$307,579	\$451,067	\$412,419	\$55,339	\$60,687	\$559,923
<b>TOTAL EXPENDITURE</b>	<b>\$1,514,210,491</b>	<b>\$438,375,321</b>	<b>\$336,421,044</b>	<b>\$221,886,047</b>	<b>\$269,690,753</b>	<b>\$90,296,481</b>	<b>\$60,428,073</b>	<b>\$52,941,535</b>	<b>\$51,873,829</b>	<b>\$48,763,140</b>	<b>\$13,009,489</b>	<b>\$4,021,499</b>	<b>\$42,010,824</b>

**Table 24: Estimated total spend by country and region of residence**

Country of residence	Net	Australia	New Zealand	Pacific Islands	USA	Continental Europe	United Kingdom	Canada	China	Japan	Other areas
Total package and pre-paid	\$1,092,813,994	\$578,121,684	\$157,701,567	\$102,138,338	\$106,159,944	\$51,727,000	\$33,578,963	\$14,664,370	\$21,787,344	\$14,784,326	\$12,691,244
Additional accommodation	\$18,519,003	\$8,273,926	\$3,843,219	\$2,835,376	\$723,656	\$1,730,267	\$839,847	\$545,295	\$101,003	\$50,176	\$468,263
Additional food and drinks	\$132,443,274	\$85,775,400	\$22,588,631	\$2,853,563	\$4,576,025	\$5,516,278	\$3,684,119	\$947,078	\$1,508,831	\$1,049,712	\$1,934,196
Additional expenditure	\$63,995,147	\$40,939,283	\$10,619,790	\$854,236	\$2,382,731	\$5,673,434	\$1,701,763	\$334,228	\$284,805	\$163,073	\$410,632
<b>Total hotel</b>	<b>\$1,307,771,418</b>	<b>\$713,110,292</b>	<b>\$194,753,207</b>	<b>\$108,681,512</b>	<b>\$113,842,356</b>	<b>\$64,646,978</b>	<b>\$39,804,691</b>	<b>\$16,490,971</b>	<b>\$23,681,982</b>	<b>\$16,047,287</b>	<b>\$15,504,335</b>
Transfers	\$4,182,840	\$1,518,194	\$942,293	\$337,334	\$474,413	\$646,503	\$384,275	\$41,687	\$7,707	\$3,763	\$91,367
Non-hotel F&B	\$40,329,286	\$21,735,278	\$9,033,209	\$4,461,185	\$1,578,541	\$1,012,655	\$983,692	\$174,314	\$575,105	\$404,658	\$525,489
Retail	\$81,554,788	\$38,596,196	\$20,390,436	\$11,273,884	\$3,157,149	\$2,734,628	\$1,169,745	\$506,177	\$3,067,704	\$964,396	\$1,548,019
Activities	\$38,505,394	\$22,951,542	\$6,013,790	\$781,218	\$3,084,331	\$2,690,148	\$1,522,455	\$266,616	\$481,302	\$254,164	\$536,970
Tours	\$6,143,253	\$4,696,291	\$431,918	\$0	\$520,012	\$231,153	\$92,615	\$85,705	\$0	\$53,969	\$70,575
Cruises	\$19,266,438	\$12,147,016	\$3,914,233	\$776,157	\$851,984	\$685,176	\$373,050	\$109,783	\$185,321	\$176,418	\$330,641
Rental cars	\$3,715,435	\$1,992,802	\$912,483	\$351,749	\$324,810	\$113,335	\$50,814	\$25,905	\$29,891	\$0	\$12,454
Public transport	\$7,595,364	\$3,755,844	\$1,171,025	\$1,123,581	\$534,865	\$369,411	\$300,423	\$254,192	\$90,557	\$102,356	\$177,889
<b>TOTAL EXPENDITURE</b>	<b>\$1,509,064,216</b>	<b>\$820,503,454</b>	<b>\$237,562,594</b>	<b>\$127,786,620</b>	<b>\$124,368,461</b>	<b>\$73,129,988</b>	<b>\$44,681,761</b>	<b>\$17,955,351</b>	<b>\$28,119,570</b>	<b>\$18,007,013</b>	<b>\$18,797,739</b>

**Table 25: Estimated total spend by main reason for visit**

Main reason for visit	NET	Holiday vacation	Transit	Business	Visit friends relatives	Conference/convention	Education training	Volunteer	Other	Sport	Church
Total package and pre-paid	\$1,091,558,204	\$948,220,509	\$19,458,758	\$41,044,331	\$16,329,284	\$26,284,379	\$8,797,681	\$1,672,901	\$2,688,592	\$2,953,856	\$0
Additional accommodation	\$18,812,280	\$14,078,427	\$636,108	\$2,554,430	\$1,281,817	\$654,206	\$759,486	\$245,438	\$0	\$152,414	\$12,403
Additional food and drinks	\$132,996,998	\$125,451,519	\$499,768	\$2,740,316	\$928,552	\$1,383,467	\$84,286	\$157,847	\$0	\$16,935	\$31,820
Additional expenditure	\$64,141,455	\$56,637,832	\$259,940	\$6,454,381	\$503,539	\$684,137	\$241,231	\$239,142	\$0	\$619,816	\$0
<b>Total hotel</b>	<b>\$1,307,508,936</b>	<b>\$1,144,388,287</b>	<b>\$20,854,575</b>	<b>\$52,793,457</b>	<b>\$19,043,192</b>	<b>\$29,006,189</b>	<b>\$9,882,684</b>	<b>\$2,315,329</b>	<b>\$2,688,592</b>	<b>\$3,743,021</b>	<b>\$44,223</b>
Transfers	\$4,203,849	\$3,590,645	\$53,623	\$275,221	\$262,316	\$57,733	\$25,013	\$13,777	\$0	\$0	\$6,912
Non-hotel F&B	\$40,681,461	\$33,510,266	\$380,619	\$3,255,933	\$1,833,810	\$1,200,672	\$894,293	\$476,588	\$5,812	\$107,938	\$34,673
Retail	\$81,492,111	\$68,210,235	\$3,933,752	\$3,514,191	\$3,278,280	\$2,479,943	\$1,086,608	\$375,956	\$90,917	\$252,409	\$81,879
Activities	\$38,527,203	\$36,183,487	\$138,302	\$422,081	\$356,770	\$515,177	\$50,107	\$286,570	\$0	\$25,362	\$17,792
Tours	\$6,144,001	\$6,099,961	\$0	\$45,666	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Cruises	\$19,342,318	\$18,155,346	\$41,050	\$906,386	\$80,538	\$101,498	\$87,062	\$0	\$0	\$99,635	\$0
Rental cars	\$3,678,740	\$2,897,742	\$12,454	\$542,628	\$97,421	\$48,394	\$68,638	\$0	\$116,241	\$0	\$0
Public transport	\$7,646,363	\$6,018,580	\$139,852	\$545,235	\$469,758	\$265,809	\$171,796	\$227,737	\$0	\$69,191	\$3,875
<b>TOTAL EXPENDITURE</b>	<b>\$1,509,224,983</b>	<b>\$1,319,054,549</b>	<b>\$25,554,228</b>	<b>\$62,300,799</b>	<b>\$25,422,086</b>	<b>\$33,675,416</b>	<b>\$12,266,201</b>	<b>\$3,695,957</b>	<b>\$2,901,562</b>	<b>\$4,297,556</b>	<b>\$189,353</b>

**Table 26: Estimated total spend by main reason for 'holiday/vacation'**

Holiday/ vacation	Net	Rest and relaxation	Honey-moon	Wedding	Scuba diving	Wedding anniversary	Surfing	Fiji culture	Sport	Transit short stay	Golf	Other
Total package and pre-paid	\$871,496,015	\$749,813,436	\$424,535,515	\$55,422,080	\$35,314,334	\$4,120,112	\$2,713,786	\$0	\$0	\$0	\$1,344,036	\$127,224
Additional accommodation	\$13,816,930	\$11,303,149	\$285,797	\$1,566,260	\$79,960	\$556,017	\$11,766	\$22,564	\$2,566	\$0	\$0	\$13,828,080
Additional food and drinks	\$124,190,287	\$105,715,564	\$11,020,254	\$6,350,605	\$636,233	\$753,358	\$213,554	\$42,227	\$3,849	\$0	\$709,161	\$125,444,807
Additional expenditure	\$56,551,295	\$45,085,809	\$3,257,819	\$5,630,246	\$330,683	\$310,407	\$2,393,419	\$0	\$0	\$0	\$0	\$57,008,383
<b>Total hotel</b>	<b>\$1,066,054,527</b>	<b>\$911,917,959</b>	<b>\$439,099,385</b>	<b>\$68,969,191</b>	<b>\$36,361,210</b>	<b>\$5,739,895</b>	<b>\$5,332,525</b>	<b>\$64,792</b>	<b>\$6,415</b>	<b>\$0</b>	<b>\$2,053,197</b>	<b>\$196,408,494</b>
Transfers	\$3,536,335	\$2,929,920	\$322,496	\$148,795	\$46,685	\$72,946	\$0	\$36,506	\$4,427	\$0	\$0	\$4,927
Non-hotel F&B	\$32,980,691	\$29,308,687	\$2,027,287	\$1,012,300	\$224,316	\$322,707	\$0	\$0	\$43,374	\$0	\$0	\$57,333
Retail	\$67,644,860	\$56,677,735	\$7,361,334	\$3,151,184	\$253,325	\$364,960	\$35,204	\$36,546	\$88,483	\$28,360	\$0	\$89,951
Activities	\$36,104,014	\$28,875,338	\$4,395,556	\$2,049,734	\$951,248	\$241,259	\$65,799	\$155,067	\$28,693	\$0	\$103,518	\$70,792
Tours	\$6,143,132	\$5,364,005	\$316,089	\$366,940	\$64,458	\$70,409	\$0	\$0	\$0	\$0	\$0	\$20,117
Cruises	\$18,155,967	\$16,080,997	\$1,207,928	\$727,207	\$20,955	\$35,204	\$39,395	\$0	\$0	\$0	\$0	\$54,483
Rental cars	\$2,795,482	\$2,490,370	\$13,327	\$292,037	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Public transport	\$5,947,127	\$5,044,116	\$477,775	\$337,904	\$97,567	\$10,394	\$0	\$0	\$0	\$0	\$0	\$1,006
<b>TOTAL EXPENDITURE</b>	<b>\$1,239,362,134</b>	<b>\$1,058,689,128</b>	<b>\$455,221,177</b>	<b>\$77,055,292</b>	<b>\$38,019,763</b>	<b>\$6,857,774</b>	<b>\$5,472,923</b>	<b>\$292,910</b>	<b>\$171,392</b>	<b>\$28,360</b>	<b>\$2,156,715</b>	<b>\$196,707,103</b>

# 11 DEFINITIONS AND CALCULATIONS

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## 11.1 Abbreviations

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

## 11.2 International Visitor Survey

An IVS is an international standard of reporting that allows comparison between countries.

The Fiji IVS does not include:

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

## 11.3 Visitor

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

## 11.4 Transit visitors

There are two types of transit visitors:

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

Currently there is an issue in distinguishing between these two types of transit visitors however will be improved in future reporting.

## 11.5 Classification of visitors for main reason of visit

The classification of visitors is self-reported during interviews from which the main reason of visit is derived. The range of reasons for visiting in the IVS is greater than those captured in the FBOS arrival data, therefore does not align with FBOS arrival data.

## **11.6 Sample size**

The sample size of the 2014 IVS is 4,337 interviews. This sample size gives a confidence level of 1.4% at the 95% confidence interval. Differences are only reported when they are significant at the 95% confidence level or higher. Small base sizes that may make the data unreliable has been noted in the report.

## **11.7 Issues with data**

The 2014 IVS was completed on paper and later entered into an electronic form. As a result, there were cases of missing data that lead to anomalies and tables produced in this report are on the basis of the data collected.

Data has been cleaned to remove outliers and obvious data collection errors. However, from June 2015 data is being collected in electronic format which will remove the issues of missing data.

## **11.8 Groups in data**

The IVS records data for groups rather than individuals meaning that the 4,337 interviews completed represent 10,179 individuals (average party size of 2.3). In all cases where this may affect findings, ‘% responses’ have been used. This shows proportion of the total number of responses (weighted) represented by the cell.

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

## **11.9 Sampling procedure**

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

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

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



## 11.10 Expenditure

### Calculation of spend

To calculate spend, the following steps are made:

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

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

### Allocation of spend to Provinces and Tourism Areas

Visitors may spend in more than one Province or Tourism Area. In this survey, Province and Tourism Area are allocated by the location of paid accommodation.

Those not in paid accommodation are included in the 'unspecified' category.

This approach means that spend is representative of the visitors to each Province and Tourism Area but all spend may not have occurred in those areas.

Data should be used to show the value of visitors to each area rather than spend specifically in each area.

### Package spend

Many visitors purchase their travel to Fiji as part of a 'package' and may not know the cost of specific components included in this travel. A travel package typically includes airfare (not part of IVS data), accommodation, transfers and in some cases meals.

Package spend is recorded in the visitors currency and then converted to Fijian Dollars.

### Package retention rate

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

The model used for package spend is:

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

This means that for every package dollar spent, thirty-one percent (31%) is retained in Fiji.

This figure is similar to other IVS analysis such as Australia that has a retention rate of thirty percent (30%).

In this report, the retention rate has been used for all spend identified as coming from a travel agent. In future, this will be improved to also address the growing use of online booking services (e.g. Expedia) where airfare is not included but have a commission that goes to the booking organisation. This analysis is not included in the 2014 IVS report as use of online booking services is not clearly defined in the current questionnaire.

### **11.11 Limitations of this research**

Limitations to the 2014 IVS include:

- Interviews are only conducted at Nadi International Airport
  - Cruise, yachts and Nausori Airport are not included
- Issues with missing data
  - The 2014 IVS data was collected on paper and then converted to electronic data. There are issues with missing data that is typical of paper-based data collection.
  - Unlike data cleaning where obvious input errors can be addressed, missing data cannot be rectified.
- Confusion with transit passengers
  - There is a degree of confusion with transit passengers who do not leave the airport and those that stay in Fiji for a short holiday or wait for a flight scheduled a few days later.
  - This will be rectified in future surveys
- Not all spend can be classified to a specific Province or Tourism Area
  - Although spend is based on paid accommodation, there is a small number that do not stay in paid accommodation such as those 'visiting friends and relatives'. These are currently shown as 'unspecified'.
  - In future IVS, all visitors will report the area stayed at regardless of whether it is paid or unpaid accommodation. This is to ensure that all spend is accounted for by Province and Tourism area.

### **11.12 Future research**

The current survey has been in place with minor updates since the 1980s while the nature of travel has changed significantly. The 2016 survey will reflect these changes and ensure that information captured remains relevant and aligned to the needs of the tourism industry.

In 2015, the survey has been changed from paper-based to electronic data collection which will remove issues related to missing data. Also included is better classification of booking methods, differentiation between 'package' and 'non-package' travel and better clarification of the areas visited by those who stayed in unpaid accommodation.

## 12 ARRIVAL DATA

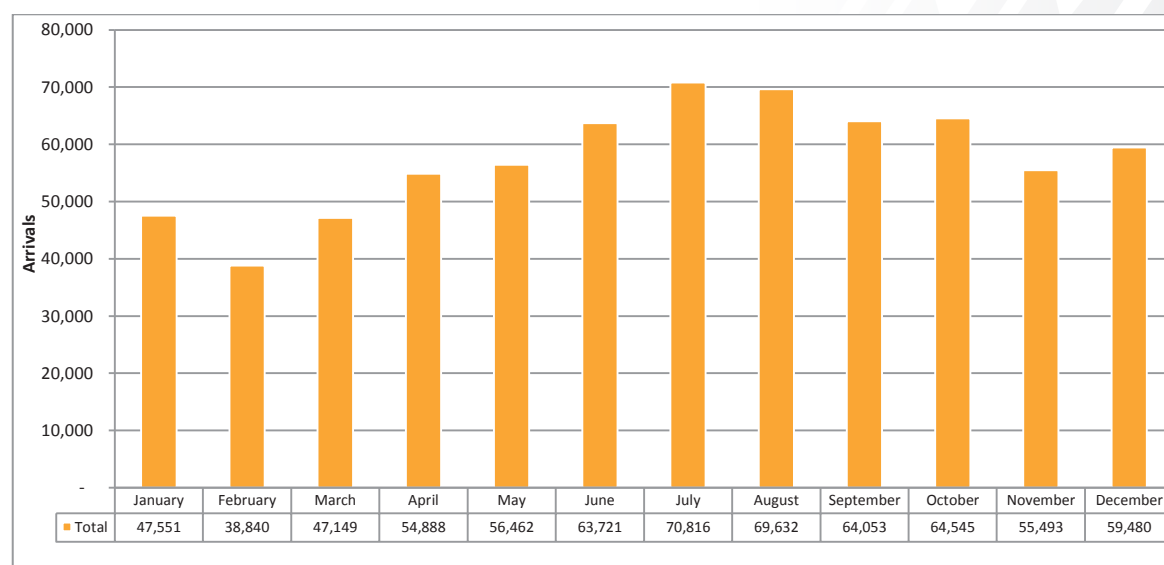
There were a total of 692,630 visitor arrivals in year 2014. The table and chart below shows a clear seasonal pattern with fewer arrivals between February and May and more arrivals between June and January. The peak months for arrivals are July and August.

**Table 27: Arrival statistics by country and region for 2014**

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Australia	25,061	17,061	24,216	28,648	29,423	32,847	32,243	33,609	34,572	32,457	27,902	31,178	<b>349,217</b>
New Zealand	5,662	3,792	5,234	9,300	9,643	12,330	18,199	16,480	13,270	12,651	8,312	9,095	<b>123,968</b>
USA	3,691	4,156	4,581	4,827	5,389	6,830	6,672	5,642	4,496	5,722	4,785	5,133	<b>61,924</b>
Canada	1,015	993	1,205	1,051	921	1,025	1,273	1,251	660	1,014	967	1,082	<b>12,457</b>
United Kingdom	1,406	1,515	1,659	1,466	1,348	1,217	1,538	1,413	1,081	1,357	1,377	1,405	<b>16,782</b>
Continental Europe	2,697	2,384	2,907	2,954	2,484	2,321	2,488	2,746	2,030	2,625	2,529	2,420	<b>30,585</b>
Japan	479	563	512	281	409	420	523	922	626	404	336	413	<b>5,888</b>
South Korea	410	376	367	400	534	460	471	317	470	591	569	711	<b>5,676</b>
China	2,508	3,099	2,048	1,860	1,675	1,857	2,757	2,199	2,506	2,692	3,013	2,119	<b>28,333</b>
India	239	312	259	276	212	234	236	180	154	173	478	304	<b>3,057</b>
Hong Kong	28	58	12	6	4	n/a	24	6	14	23	53	81	<b>309</b>
Rest of Asia	515	439	705	627	575	1,078	897	691	988	1,138	840	557	<b>9,050</b>
Pacific Islands	3,259	3,775	3,088	2,927	3,271	2,842	3,139	3,398	2,839	3,244	3,931	3,585	<b>39,298</b>
Others	581	317	356	265	574	260	356	778	347	454	401	1,397	<b>6,086</b>
<b>Total</b>	<b>47,551</b>	<b>38,840</b>	<b>47,149</b>	<b>54,888</b>	<b>56,462</b>	<b>63,721</b>	<b>70,816</b>	<b>69,632</b>	<b>64,053</b>	<b>64,545</b>	<b>55,493</b>	<b>59,480</b>	<b>692,630</b>

Source: Fiji Bureau of Statistics

**Chart 72: Arrival statistics in total for 2014**



Source: Fiji Bureau of Statistics

## 13 QUESTIONNAIRE

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**INTRODUCTION: Bula. My name is and I'm from the Department of Tourism. We're interviewing a variety of visitors to find out their opinions of Fiji as a place for people to visit. We're doing this so we can improve our services to visitors. Do you have time to answer a few questions?**

[FIRST SET THE INTERVIEW START DATE ONCE INTERVIEW HAS STARTED]

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

Yes (TERMINATE)

No

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

Yes (TERMINATE)

No

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

Yes (TERMINATE)

No

IF GROUP / COUPLE INTERVIEW PERSON WITH LAST BIRTHDAY

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

Visitor leaving Fiji Transit passenger

**Q2. What date did you arrive in Fiji:**

/ / 2010

**Q4. How many nights did you spend in Fiji?**

**Q5. Where did you arrive in Fiji?**

Nadi airport

Suva (Nausori) airport

By sea

Other (please specify):

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

Air Pacific / QANTAS

Air New Zealand

Pacific Blue (Virgin)

Korean Air

Air Caledonie

Air Vanuatu

Air Fiji

Air Nauru

Polynesian Airlines

Royal Tongan Airlines

Solomon Airlines

Freedom Air

American Airlines

Canadian Airlines

Air Niugini

Pacific Sun

Other (please specify):

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

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

Began trip in that country

Spent time in another country

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

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

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

End of the trip

Continuing on to another country

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

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

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

Holiday/vacation

Business

Conference/convention

Visit friends/relatives

Education/training

Transit to other Pacific Island

Other (please specify):

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

Rest and relaxation  
Honeymoon  
Scuba diving  
Wedding  
Fiji culture  
Shopping  
Golf  
Wedding anniversary  
Surfing  
Other (please specify):

**Q15. Are you backpacking?**

Yes  
No

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

Yes  
No  
Don't know

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

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

Couple/partners/husband & wife  
Couple with child/children  
One parent with child/children  
Other family (brothers/sisters/etc)  
Friends  
Business associates  
Other (please specify):

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

TRAVEL AGENT  
By phone, fax, or in person  
By email  
By website

**AIRLINE**

By phone, fax, or in person  
By email  
By website

**DIRECT WITH HOTEL / MOTEL**

By phone, fax, or in person  
By email

By website

**HOTEL BOOKING SERVICE**

By phone, fax, or in person  
By email  
By website

**THROUGH FRIENDS / RELATIVES IN FIJI**

NO BOOKING MADE  
OTHER (please specify):

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

Travel agent  
Travel books/guides/brochures  
Previous visit  
Friends/relatives who have visited  
Newspapers/magazines/TV  
Airlines  
Friends/relatives in Fiji  
Tourism Fiji  
Internet  
Business associates/workplace  
School  
Did not get any information [excl.]  
Other (please specify):

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

Travel agent  
Travel books/guides/brochures  
Previous visit  
Friends/relatives who have visited  
Newspapers/magazines/TV  
Airlines  
Friends/relatives in Fiji  
Tourism Fiji  
Internet  
Business associates/workplace  
School  
Did not get any information [added for autopunch] Other

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

Sharing with others  
Self only

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

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

Package / pre-paid / part pre-paid  
Paid in Fiji

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

Yes  
No

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

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

**Q25b. What currency is this payment in?**

**Q26. What did your travel package include?**

International airfare  
Domestic Fiji airfare  
Transfers  
Accommodation  
Meals  
Food and beverages  
Activities  
Rental cars  
Other (please specify):

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

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

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

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

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

**Q30. Was this transfer...**

Pre-paid or package  
Paid in Fiji  
No cost

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

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

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

**Q34. How much did you spend at [NAME] on ... Did you spend any money in addition to the amount prepaid on...?**

Accommodation (room)  
Food and drinks  
Any additional expenditure  
No additional expenditure

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

Yes  
No

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

\$Fiji

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

Yes  
No

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

\$Fiji

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

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

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

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

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

**Q41. Was this transfer...**

Pre-paid or package  
Paid in Fiji  
No cost

**Q42. How much did this transfer cost? \$Fiji**

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

Yes  
No

**Q44. How many rental cars did you use?**

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

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

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

**Q46. How many days did you hire this car?**

**Q47. Was this rental car...**

Pre-paid or package  
Paid in Fiji

**Q48. How much did this rental car cost? \$Fiji  
Cost already recorded elsewhere in survey**

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

Yes  
No

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

Bus  
Minibus  
Taxi

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

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

**BEACH ACTIVITIES**

Beach volleyball  
Beach walking  
Laying on beach

**SALT WATER ACTIVITIES**

Swimming  
Scuba Diving

Snorkelling  
 Surfing  
 Sailing/Yachting  
 Jet boat  
 Boat ride  
 Canoeing/kayaking  
 Jet ski  
 Wind surfing  
 Water skiing  
 Banana boat  
 Parasailing  
 Deep/big game fishing  
 Other fishing  
 Reef walking  
 Coral viewing  
 Dolphin watching  
 Fish feeding  
**FRESH WATER ACTIVITIES**  
 Swimming  
 Jet boat  
 Rafting/Bilibili  
 Canoeing/kayaking  
 Boat ride  
 Fishing  
 Pool games  
 Laying on poolside  
**SPORTS**  
 Bike riding/cycling  
 Bowls  
 Bushwalking/hiking  
 Football/rugby  
 Golf  
 Gym  
 Horse riding  
 Motor bike riding  
 Running/jogging  
 Squash  
 Tennis  
 Volleyball  
 Sky diving  
 Pool/billiards  
 Walking  
**CULTURAL ACTIVITIES**  
 Kava drinking/ceremony  
 Museum visit  
 Meke  
 Firewalking  
 Cultural centre/Fort, etc  
 Village visit/tour  
 Weaving  
 Choir/concert  
 Church service  
**OTHER ACTIVITIES**  
 Babysitting

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

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

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

Yes  
 No

**Q54. How many organised tours did you take?**

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

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

Paid in Fiji  
 Prepaid

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

\$FJ  
 Cost already recorded elsewhere in survey

**Q57. What type of tour was it?**

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

**Q58. What area was the tour?**

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

**Q59. How long was the tour?**

½ day or less  
 Full day  
 2 days or more



**Q60. Which company operated the tour?**

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

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

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

Yes  
No

**Q62. How many cruises did you take?**

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

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

Paid in Fiji  
Prepaid

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

\$FJ  
Cost already recorded elsewhere in survey

**Q65. Where did you depart from?**

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

**Q66. What area was the cruise in?**

Mamanucas  
Yasawas  
Outer Islands  
River in Viti Levu  
Other (Please specify)

**Q67. How long was the cruise?**

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

**Q68. Which company operated the cruise?**

**Q69. This next section is about air travel**  
**Did you use any domestic air travel in Fiji as a part of this trip?**

Yes  
No  
Already recorded as a transfer

**Q70. How many flights did you take?**  
**A return trip counts as one flight.**

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

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

Paid in Fiji  
Prepaid

**Q72. How much did this flight cost you?**

\$FJ  
Cost already recorded elsewhere in survey

**Q73. Where did you travel from?**

**Q74. Where did you travel to?**

**Q75. Was this air travel return or one way?**

Return  
One way

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

No other trips  
Road  
Cruise  
Air

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

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

Yes  
No  
Don't know

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

Locally made handcrafts  
Other souvenirs  
Clothing  
Alcohol  
Foodstuffs  
Perfume  
Jewellery

Cigarettes/tobacco  
 Watches/clocks  
 Shoes/sandals  
 Books/stationery  
 Film / processing / printing  
 Handbags/wallets  
 Cameras & camera equipment  
 Materials/textiles  
 Paintings  
 Suitcases/travel bags  
 Toys/games  
 Music / videos (CD/DVD/etc)  
 Other:  
 Refused

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

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

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

**Was this your first visit to Fiji?**

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

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

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

**Q82. How many times have you visited Fiji before?**

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

**Q83. How long ago was your last visit?**

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

**Q84. What were the reasons for your last visit?**

Holiday  
 Business

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

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

The people  
 The climate/weather  
 The scenery/nature  
 Relaxing/peaceful  
 Hospitality  
 The beaches  
 Clear/beautiful water  
 The islands  
 Good food  
 Snorkelling  
 Culture/craft  
 Service at hotel/staff  
 Accommodation at hotel/resort  
 Activities  
 Coral reefs  
 Good value for money  
 Shopping  
 Fiji time  
 Scuba diving  
 The way of life  
 Clean environment/beaches/coast  
 Villages  
 Everything  
 Cruise  
 Well located/accessible/close to home  
 Music/singing  
 Safe  
 Level of development  
 Kava  
 Transport good/easy/cheap  
 Other  
 Good for kids/family  
 Swimming  
 Facilities at hotel/resort  
 Other (please specify):

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

Nothing  
 Shopkeepers/traders  
 Too expensive  
 Dirty/untidy/pollution  
 Insects & bugs  
 Bad roads  
 The climate/weather

Quality of food  
Service at hotel  
Harassment on street to buy  
Other  
Crime / feel unsafe  
Other (please specify):

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

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

**AUSTRALIA**

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

**NEW ZEALAND**

North Island  
South Island

**USA**

West  
Midwest  
Northeast  
South  
Other territories

**CANADA**

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

**OTHER AMERICA**

Mexico  
Other North/Central America  
South America

**AFRICA**

North Africa  
West Africa  
Central Africa

Horn of Africa  
East Africa  
Southern Africa  
**PACIFIC / OCEANIA**

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

**JAPAN**

Kanto  
Kinki  
Chubu  
Other Japan

**OTHER ASIA**

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

**EUROPE**

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

**OTHER**

Rest of the world

**Q89. What is your residential postcode or zip code?**

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

Age Ranges:

Under 13 years

13-19 years

20-29 years

30-39 years

40-49 years

50-59 years

60 years and over

Refused

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

Name:

Email address:

Refused

**Q94. Flight number:**

Not at airport

**Thank you for your time today, vinaka!**

**Q93. Interviewer name:**

**Q95. On-site or data entry**

Onsite

Data entry

**Q96. Date of interview**

/ / 2014