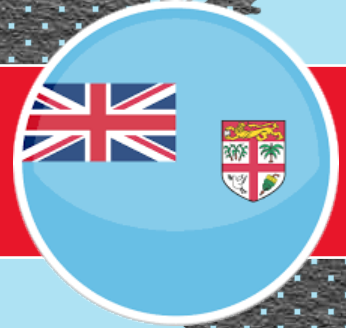


INTERNATIONAL VISITOR SURVEY

FIJI



2019 Report for January – December 2019
Published July 2020 - Updated



MINISTRY OF
INDUSTRY, TRADE
AND TOURISM



IFC

International
Finance Corporation
WORLD BANK GROUP

Creating Markets, Creating Opportunities



NEW ZEALAND
FOREIGN AFFAIRS & TRADE



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



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



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



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



Improving health and hygiene is critical to build consumer confidence.



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



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



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

2019 INTERNATIONAL VISITOR SURVEY



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



This report is an interim report with data from the 2019 calendar year. Unless otherwise stated, all reported figures are provisional and subject to periodic review.

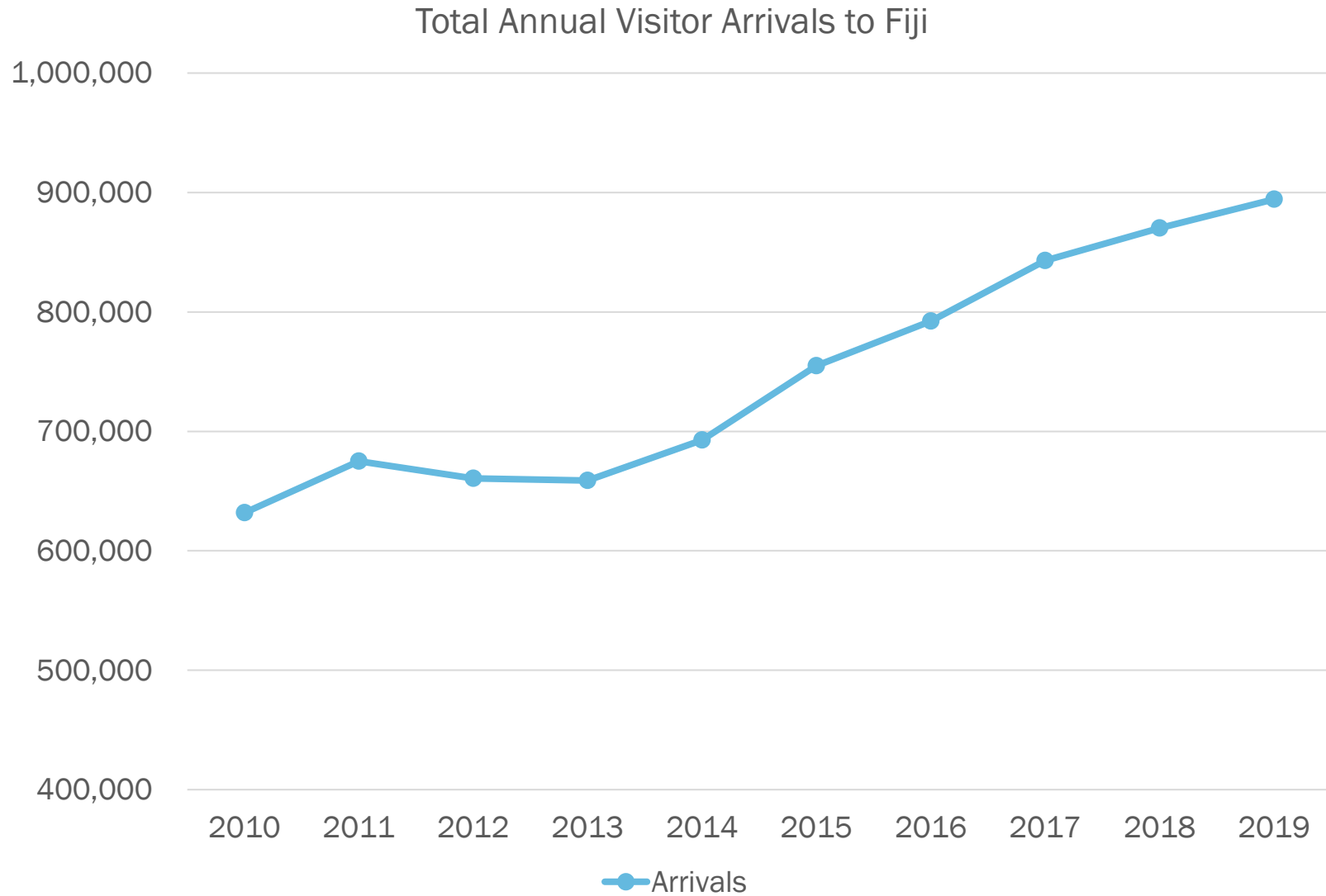


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Note: This report is the second in a series of IVS reports for 2019. In the January – June 2019 Interim report, satisfaction rates and rates of likelihood to recommendation Fiji were presented as the percent of visitors who selected 9 to 10 on a scale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

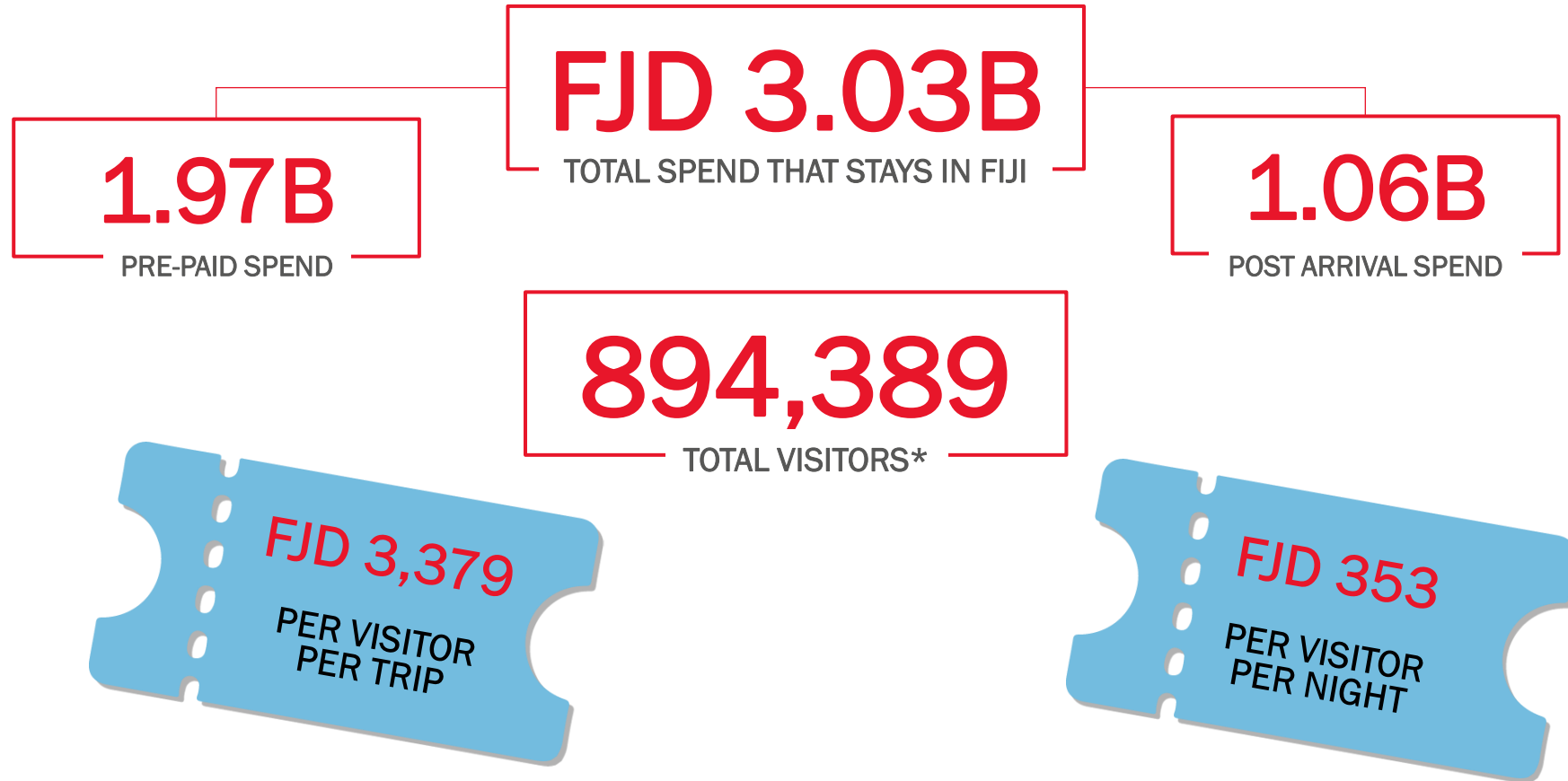
ANNUAL VISITOR ARRIVALS 2010 - 2019



TOTAL VISITORS CHARACTERISTICS

2019





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

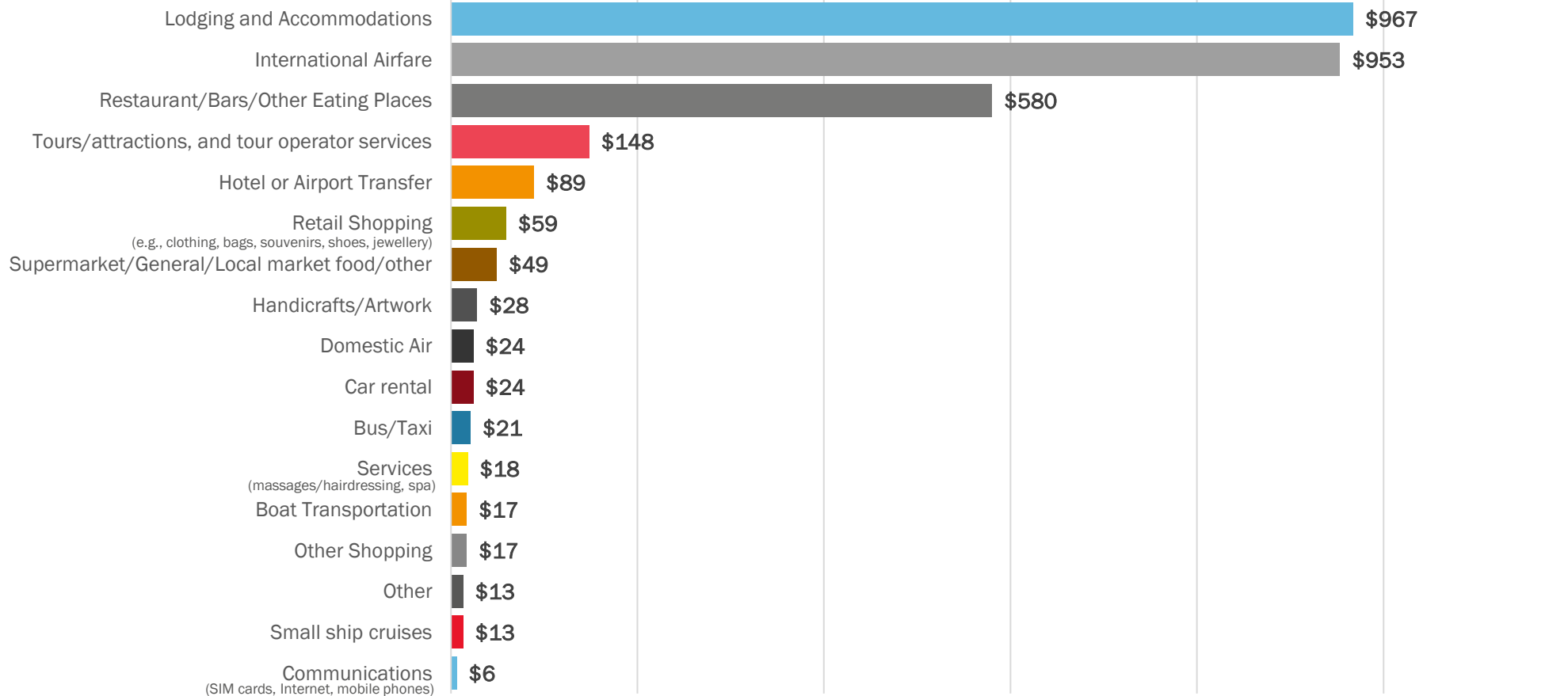
Total Visitors exclude Fiji Residents and Persons In-Transit. 2019 spending figures are not comparable to previous years due to a change in methodology similar to other Pacific nations: Spending excludes in-market expenses such as commissions but includes 50% of overseas airfare - See Appendix.

* Based on official immigration statistics

SUMMARY OF KEY FINDINGS: VISITOR SPEND

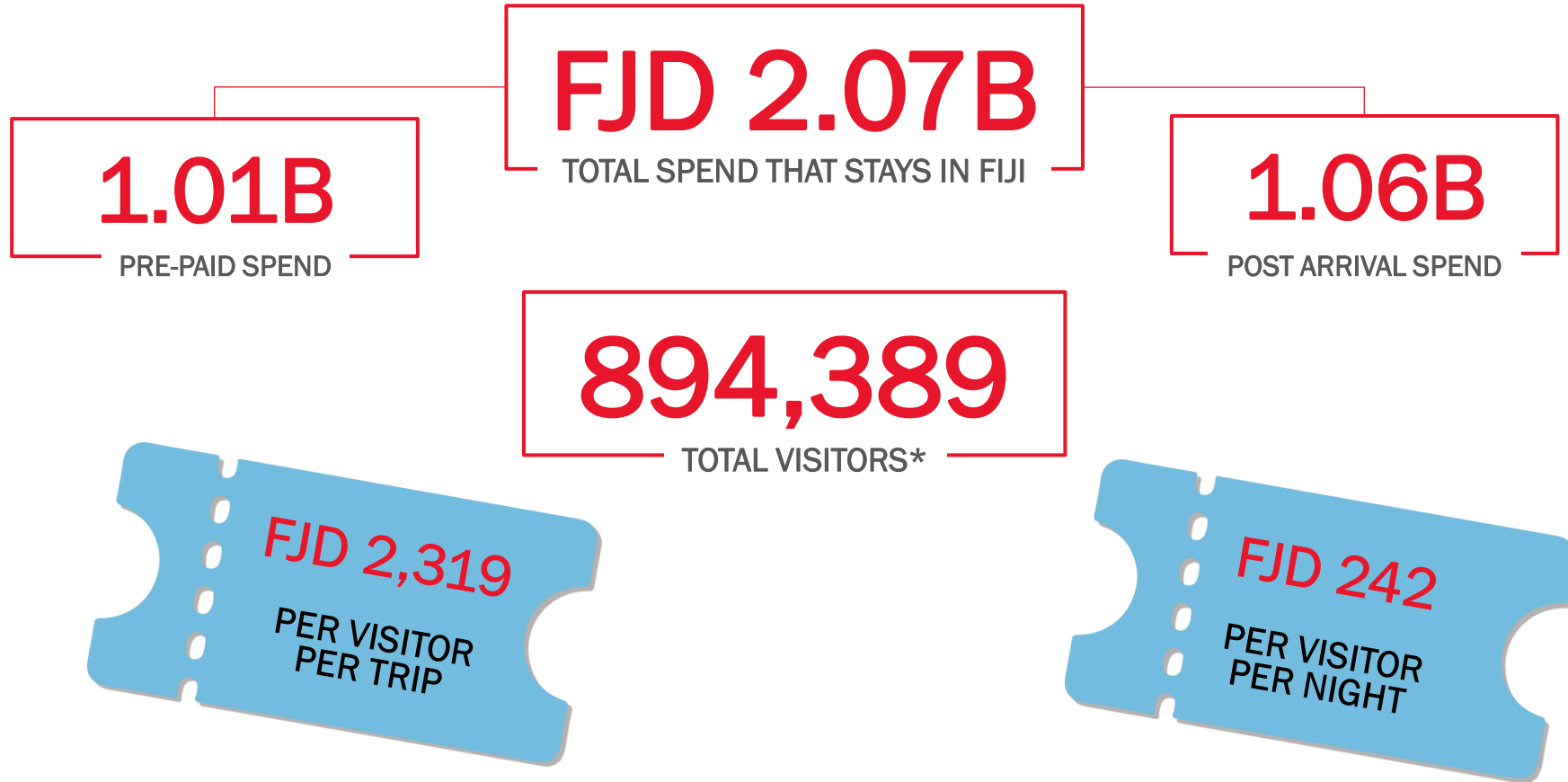
2019 TOTAL VISITORS

Total Spend (FJD million)



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

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



For data comparable to previous years, visitor spending excluding international airfare was calculated. This also more accurately shows the spend on lodging, tours, food and beverage and other areas per visitor. With international airfare removed, spending per visitor per trip decreases by about 46%, highlighting the importance of spend on international airfare.

Total Visitors exclude Fiji Residents and Persons In-Transit.
* Based on official immigration statistics

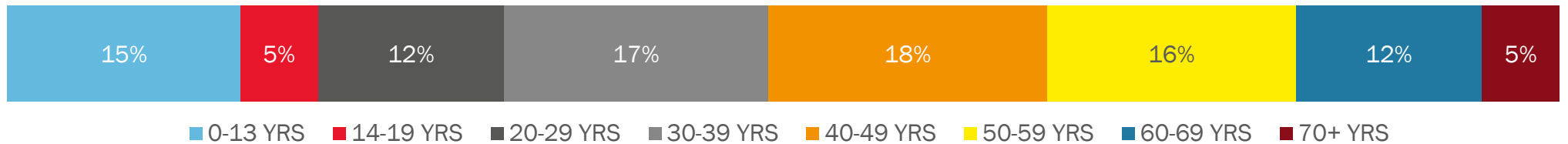
TOTAL VISITORS DEMOGRAPHICS

2019 TOTAL VISITORS

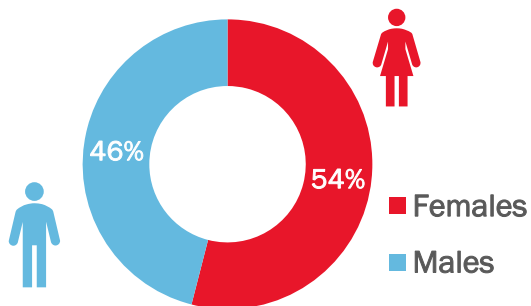
TOTAL VISITORS (%) BY SOURCE MARKET*



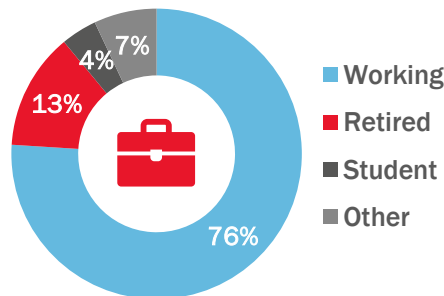
AGE OF VISITORS (%)



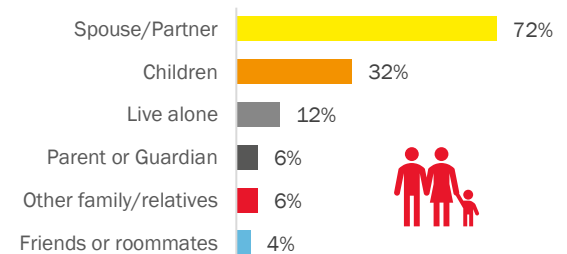
GENDER



EMPLOYMENT STATUS



HOUSEHOLD



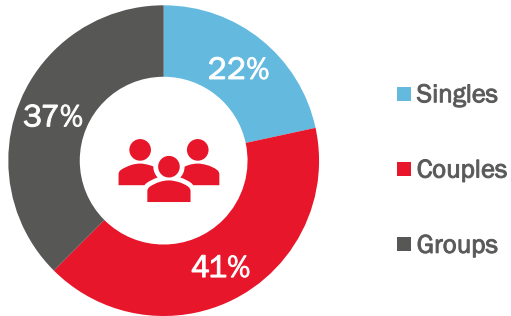
Australia continued to be the largest source for visitors to Fiji (41%). With New Zealand (23%) and USA (11%) a distant second and third. The average age of the party head was between 40-49 years old. Most of these visitors worked full- or part-time, though 13% were retired. Three-quarters of households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

*:Based on official immigration numbers

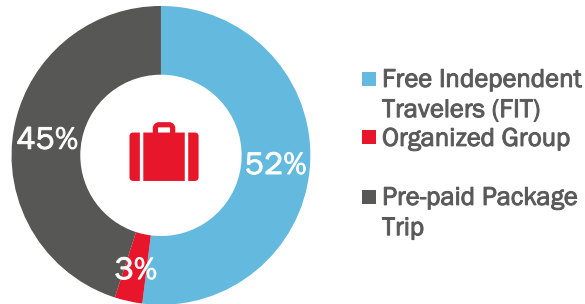
TRIP CHARACTERISTICS

2019 TOTAL VISITORS

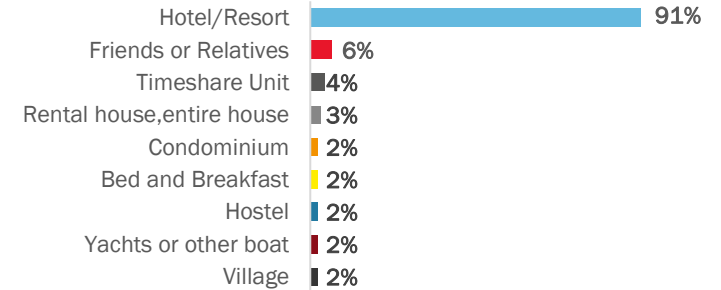
PARTY SIZE



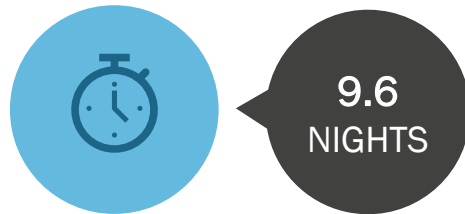
TYPE OF TRAVELERS*



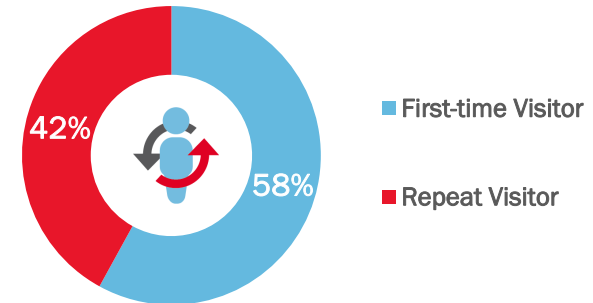
ACCOMMODATION



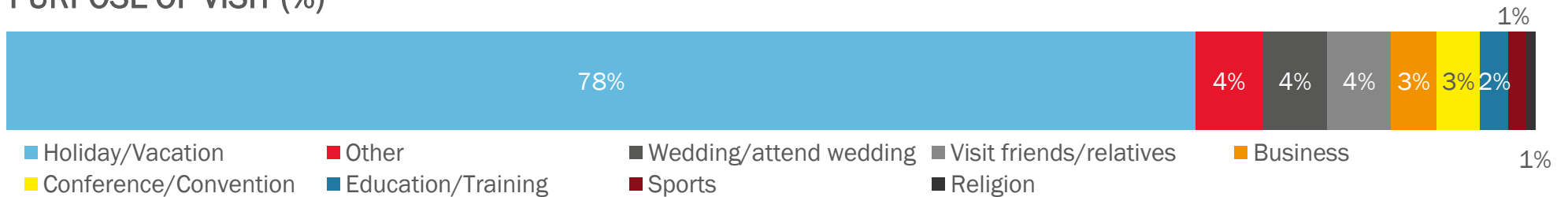
AVERAGE LENGTH OF STAY



NEW OR RETURNING

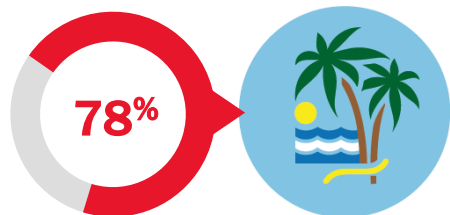


PURPOSE OF VISIT (%)

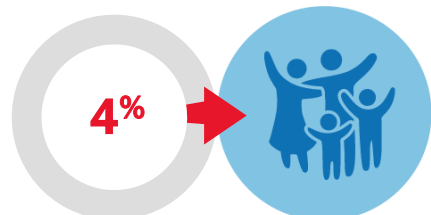


*: Organized group consists of respondents who travelled with a tour or school group, regardless of if they paid for a package trip.

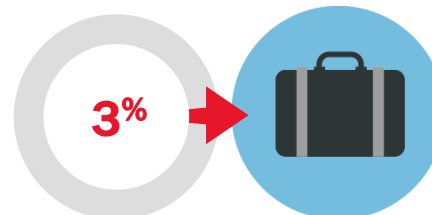
On average, across the entire year, visitors stayed 9.6 nights, and many travelled as pairs (41%). The majority (58%) were first time visitors and just over half planned their own travel (not on an organised trip). Another one-third of visitors came as small groups. Almost everyone (91%) stayed at a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



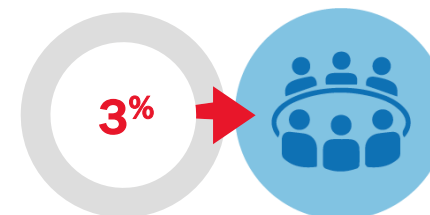
HOLIDAY



VISITING FRIENDS & RELATIVES



BUSINESS



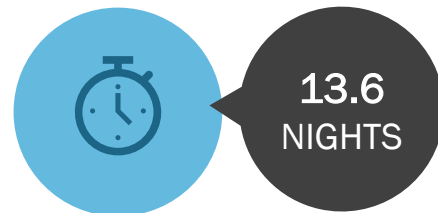
CONFERENCE



AVERAGE LENGTH OF STAY



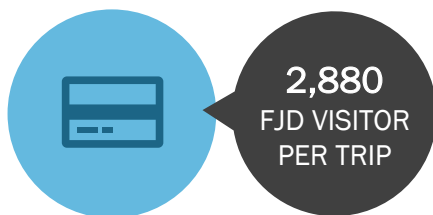
AVERAGE LENGTH OF STAY



AVERAGE LENGTH OF STAY

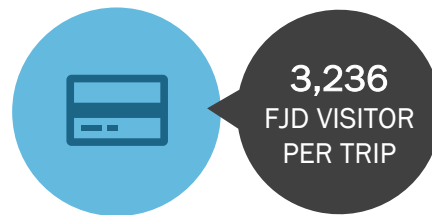


AVERAGE LENGTH OF STAY



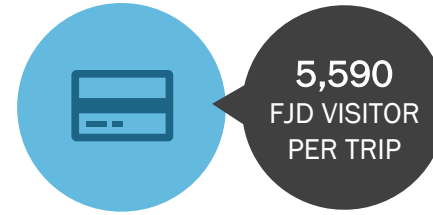
SPEND

360 FJD Per Night



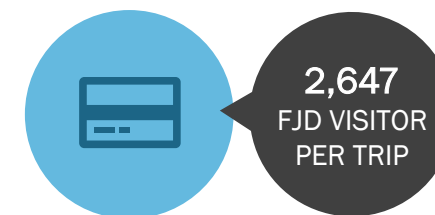
SPEND

261 FJD Per Night



SPEND

411 FJD Per Night



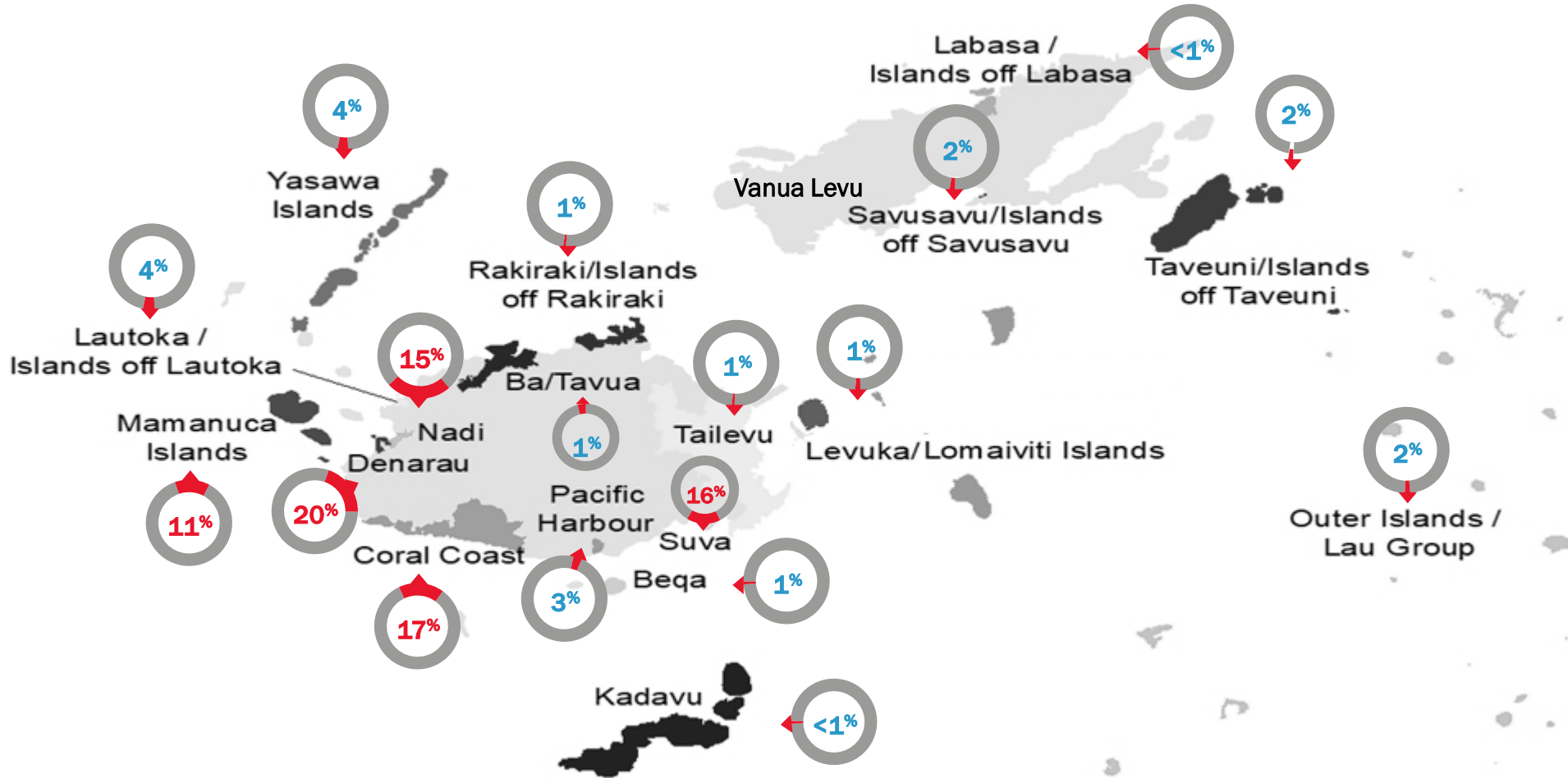
SPEND

427 FJD Per Night

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

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

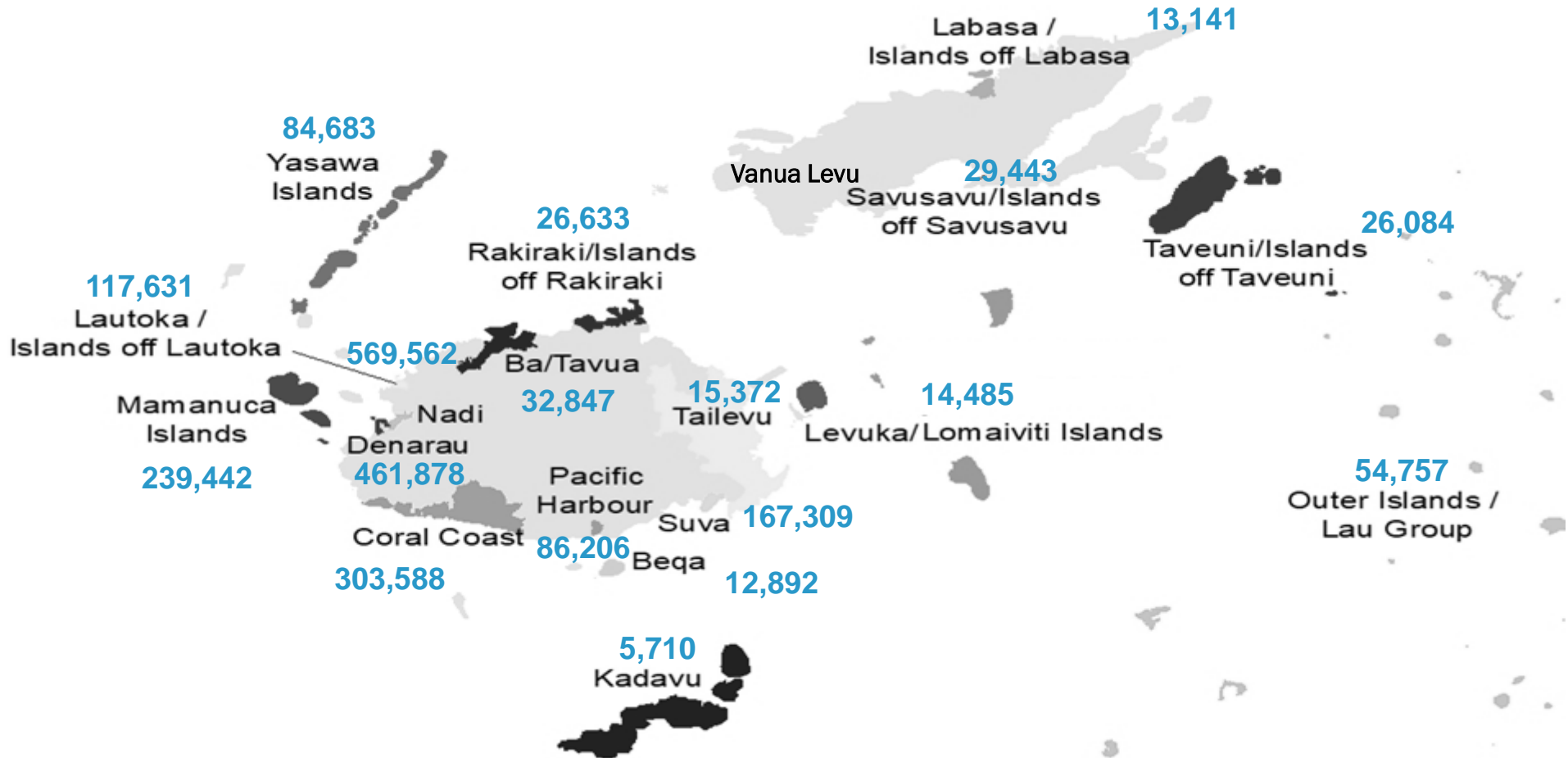
Regions Visited as a Percent of Total Visitor Days



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

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

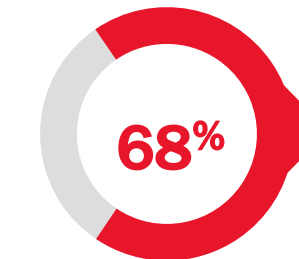
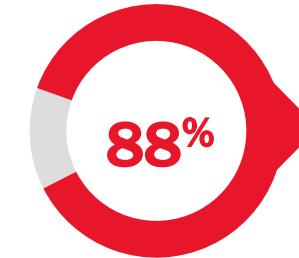
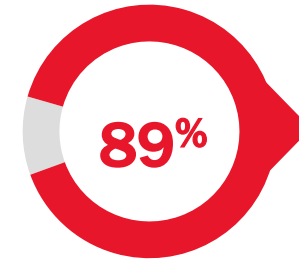
Number of Visitors



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

Number of visitors: The number of visitors who traveled to the region in 2019 for a day trip or even longer.

SATISFACTION WITH FIJI EXPERIENCE

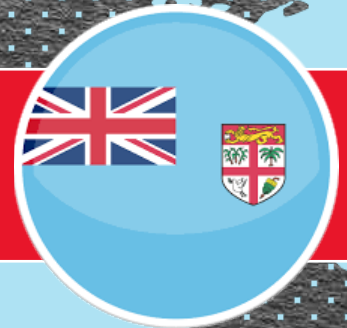


9-out-of-10 visitors gave their trip experience a high rate of satisfaction. Many visitors were particularly satisfied with the customer service they experienced and the quality of accommodations. Their overall airport experience, including their experience with passport and customs, was very pleasant.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

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

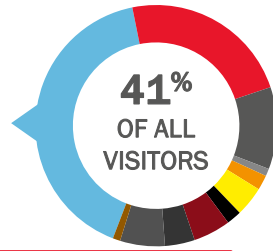
SOURCE MARKET PROFILES

2019



2019

AUSTRALIA



367,020

TOTAL VISITORS

FJD 919M

TOTAL SPEND

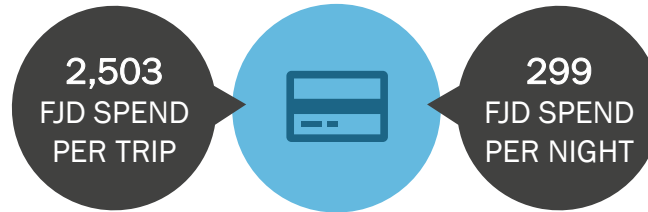
FJD 573M

PRE-PAID SPEND

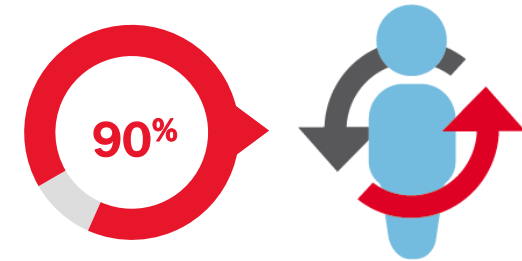
AVERAGE LENGTH OF STAY



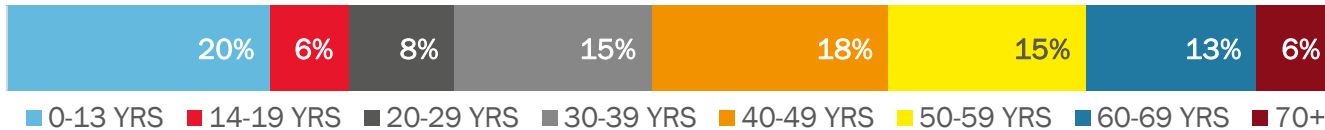
SPEND



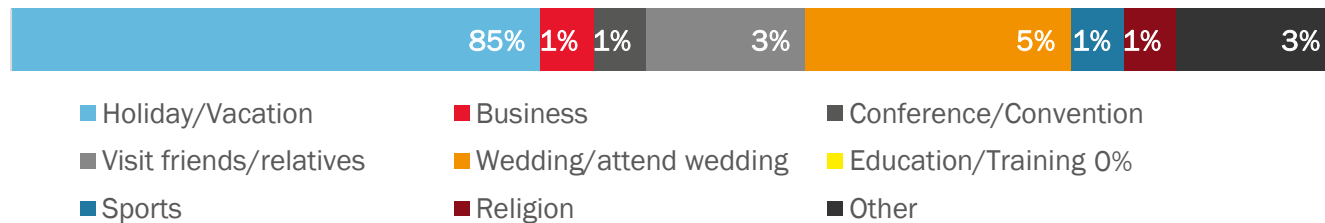
SATISFACTION



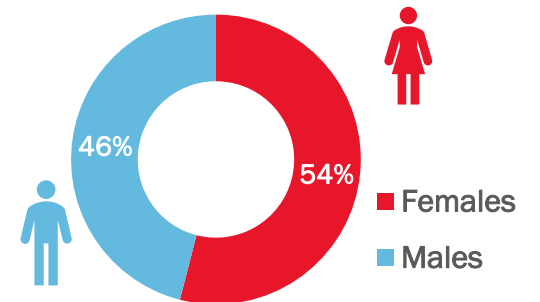
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



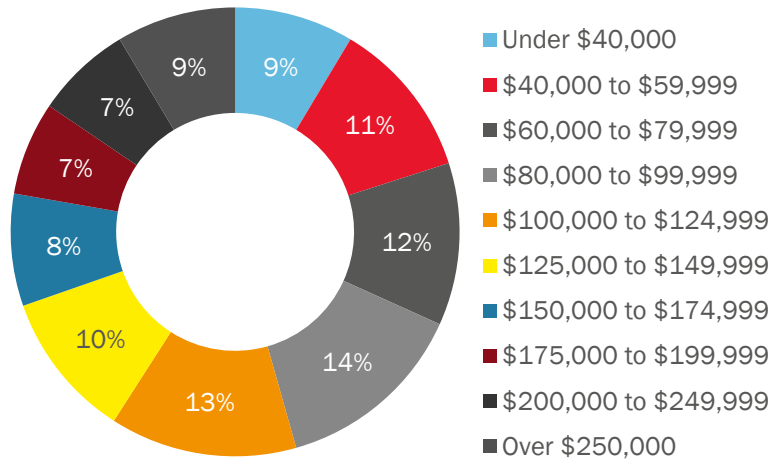
GENDER



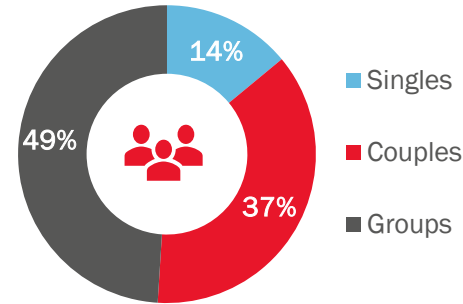
The growth in visitor arrivals from Australia was relatively stable at +0.4%. Australia continued to account for the largest share of visitors (41%). Australians spent less than the overall average visitor due to a lower pre-paid package cost and slightly less post-arrival spending. Most visitors were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

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

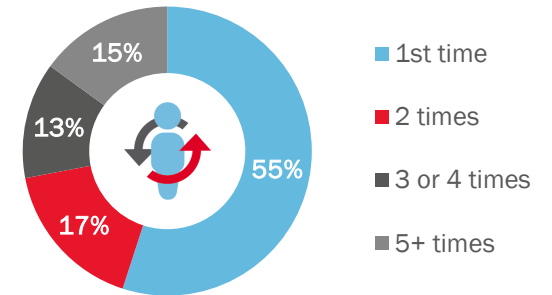
ANNUAL HOUSEHOLD INCOME (AUD)



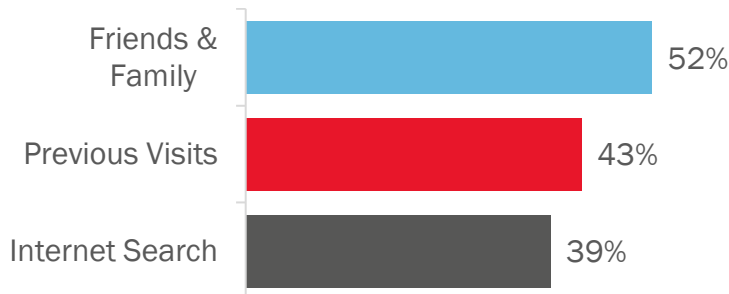
PARTY SIZE



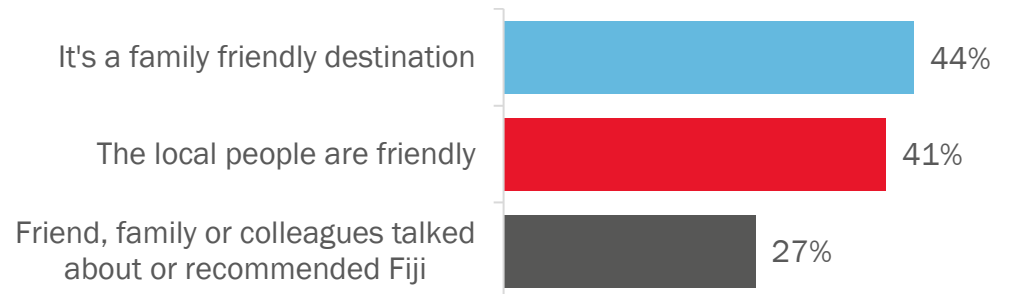
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

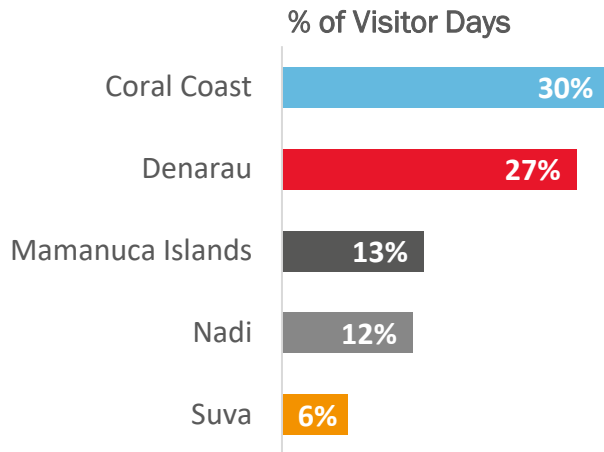


The Australian visitor spanned the full range of economic status and usually travelled in groups or pairs, but rarely travelled alone. This market has a high number of repeat visitors (45%), as such, Australians rely on recommendations from friends and previous visits for information. Australians stated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

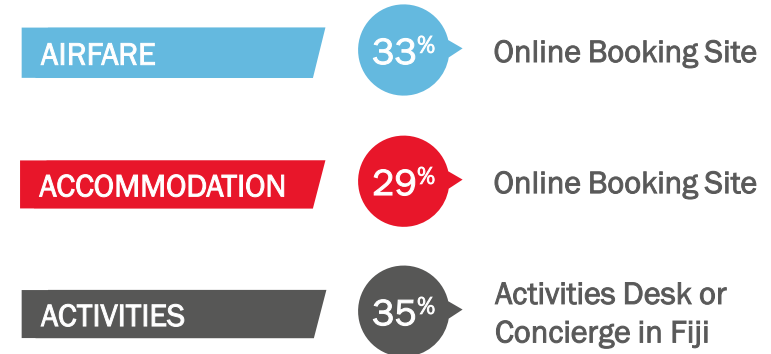
* Multiple responses, therefore, totals do not add up to 100%.



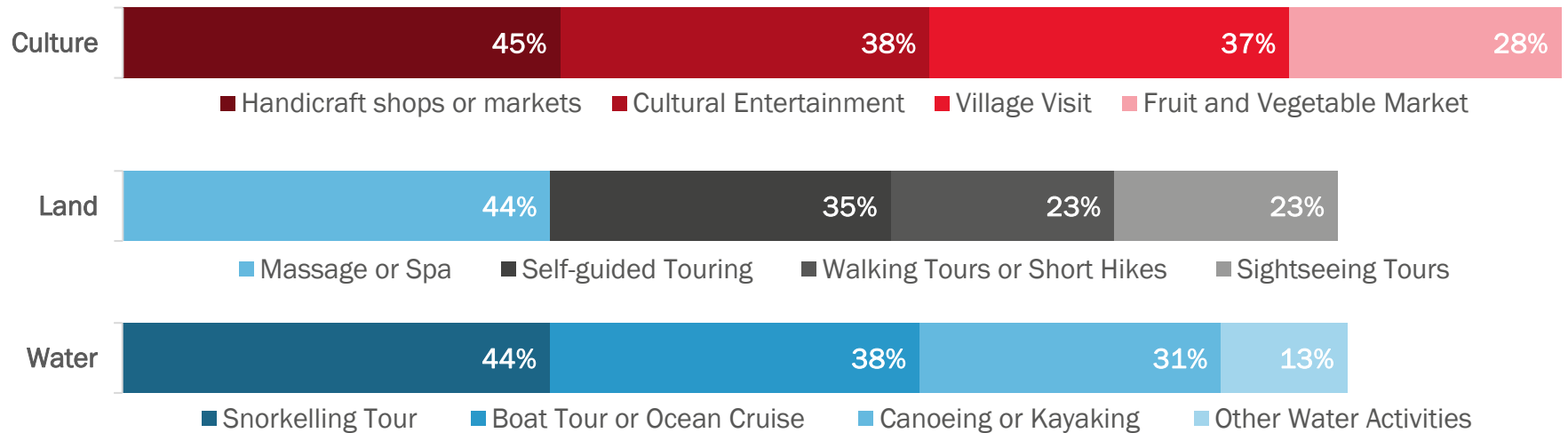
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

2019

NEW ZEALAND



205,998

TOTAL VISITORS

FJD 461M

TOTAL SPEND

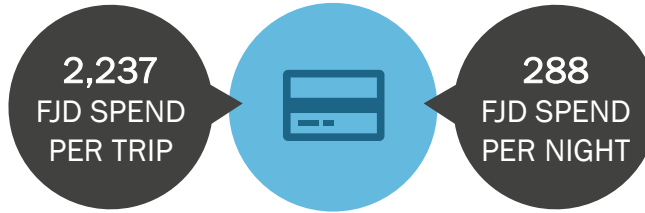
FJD 284M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



SPEND



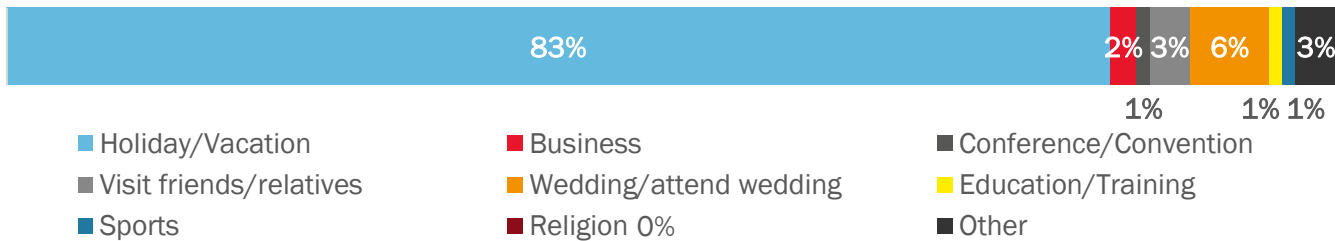
SATISFACTION



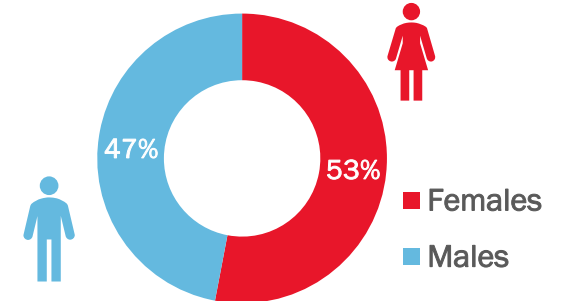
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



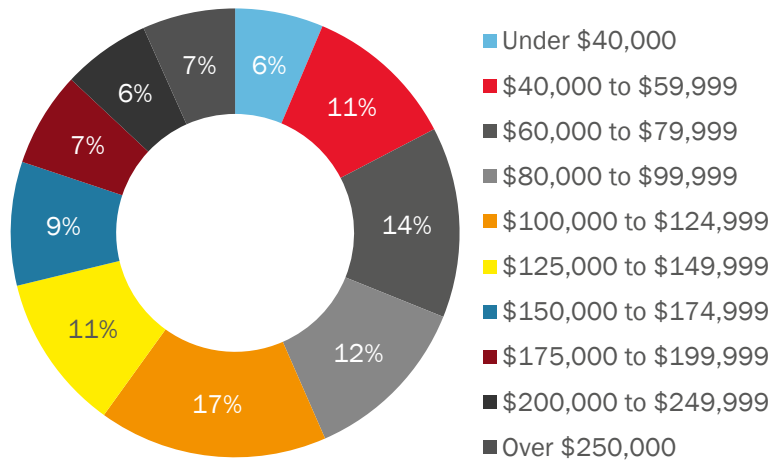
GENDER



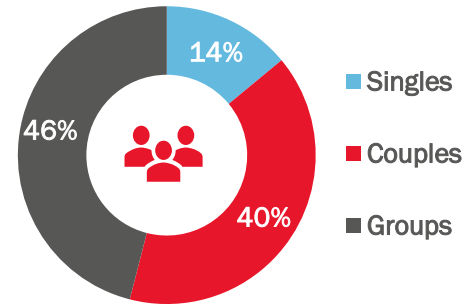
New Zealand visitation was up +3.7% in 2019. Daily spending by New Zealanders was slightly less than Australian visitors and so was the per trip spending due to the shorter length of stay.

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

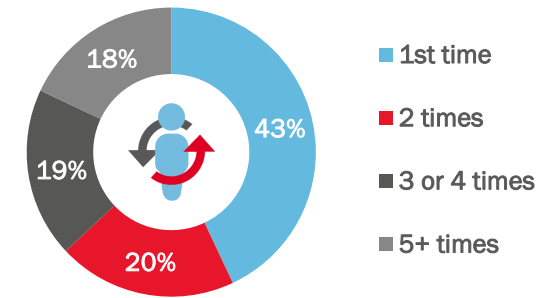
ANNUAL HOUSEHOLD INCOME (NZD)



PARTY SIZE



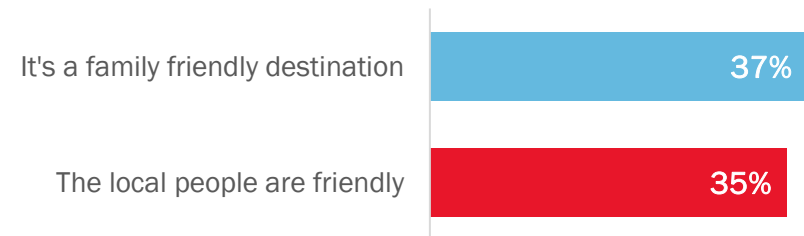
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

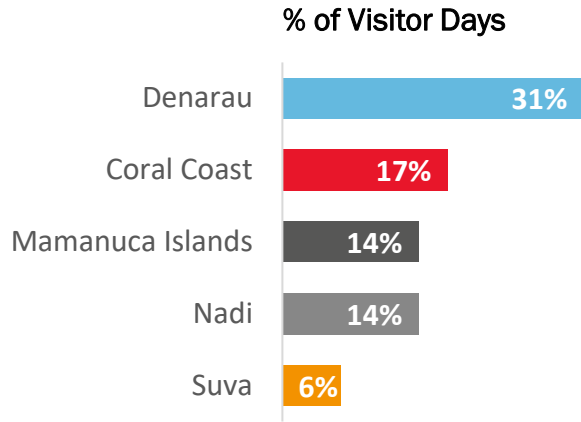


The New Zealand market had an average household income of NZD 100K – 125K and many visitors had already been to Fiji at least once before (57%). As a repeat market, friends and family and past experiences played a large role in planning. However, internet searching also influenced this market. A family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

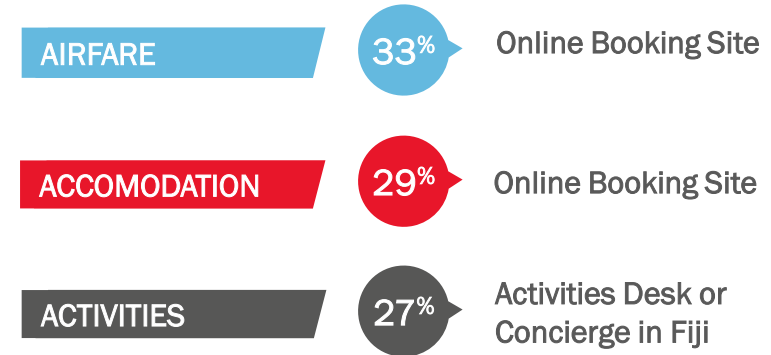
*Multiple responses, therefore, totals do not add up to 100%.



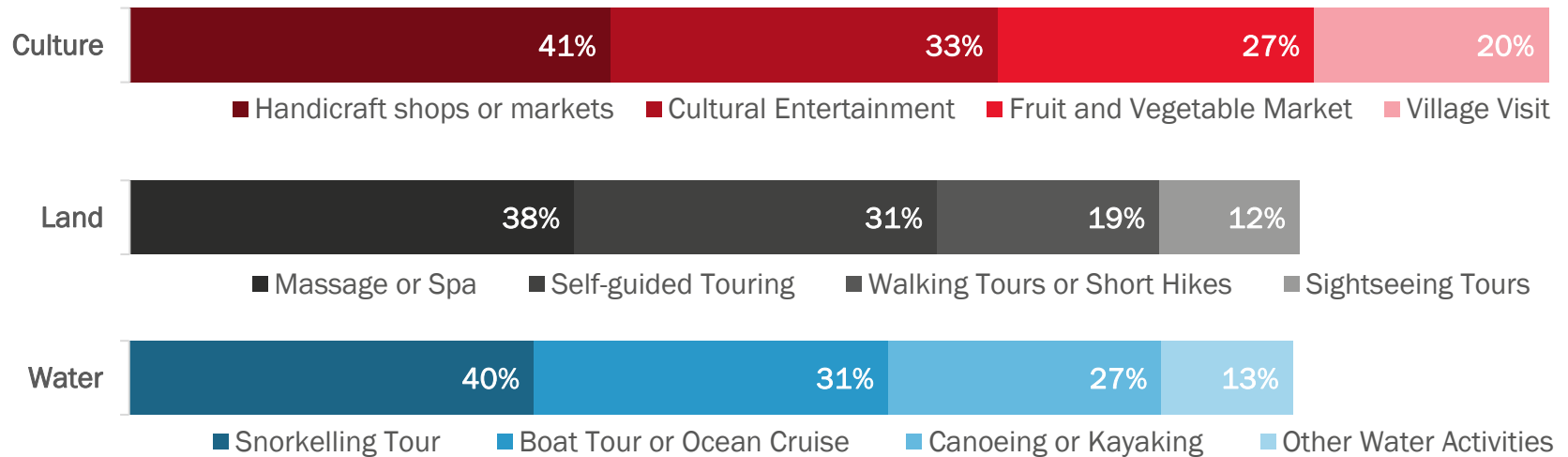
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*

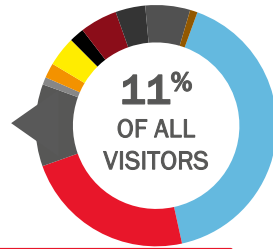


New Zealanders were more likely to enjoy Denarau as a destination of choice. Online was the preferred booking method for both their airfare and accommodations while the activities desk continued to play a role in activities selection. With many repeat experiences, they were less likely to be interested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

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

2019

UNITED STATES



96,968

TOTAL VISITORS

FJD 453M

TOTAL SPEND

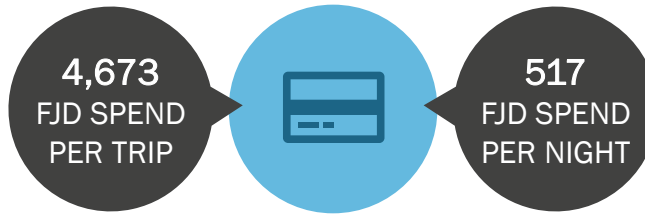
FJD 312M

PRE-PAID SPEND

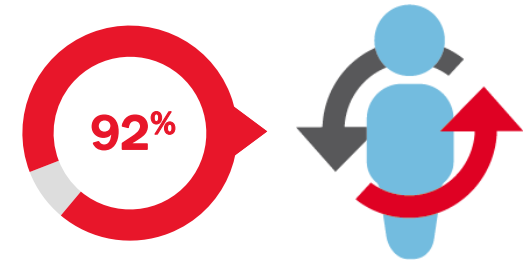
AVERAGE LENGTH OF STAY



SPEND



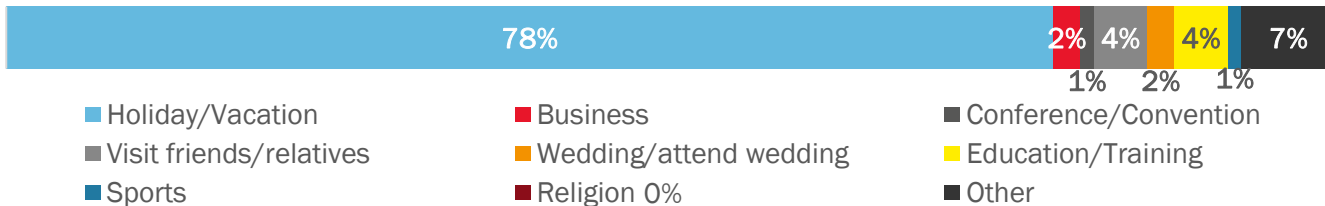
SATISFACTION



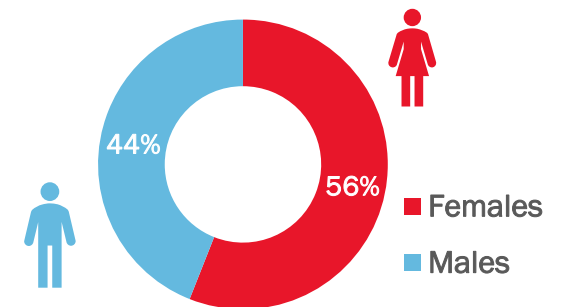
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



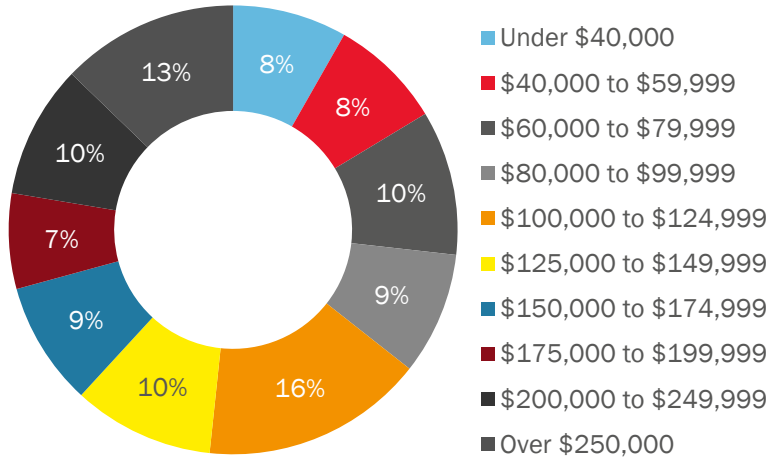
GENDER



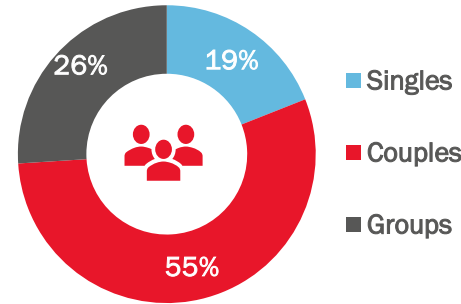
2019 saw a surge in U.S. visitors (+12.7%). Though the average age is like other markets, there were fewer children travelling from the U.S.A. Visitors were highly satisfied. Their average daily spend and their average expenditures while in Fiji are the third highest amongst all the major markets.

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

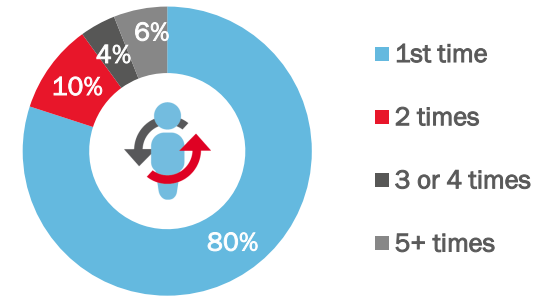
ANNUAL HOUSEHOLD INCOME (US\$)



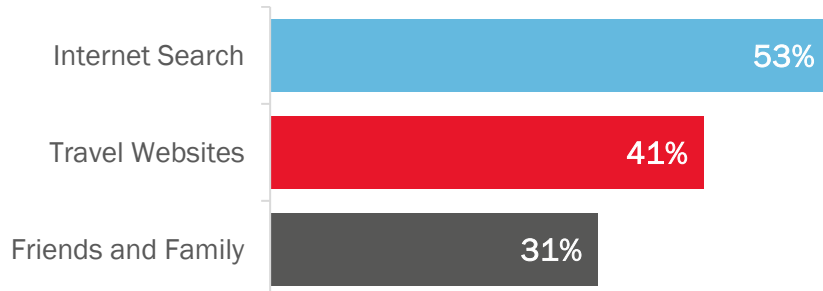
PARTY SIZE



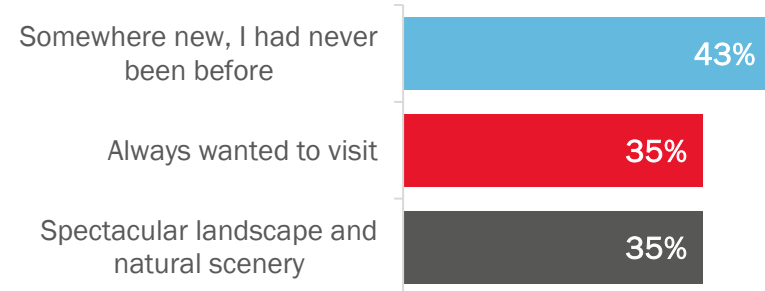
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

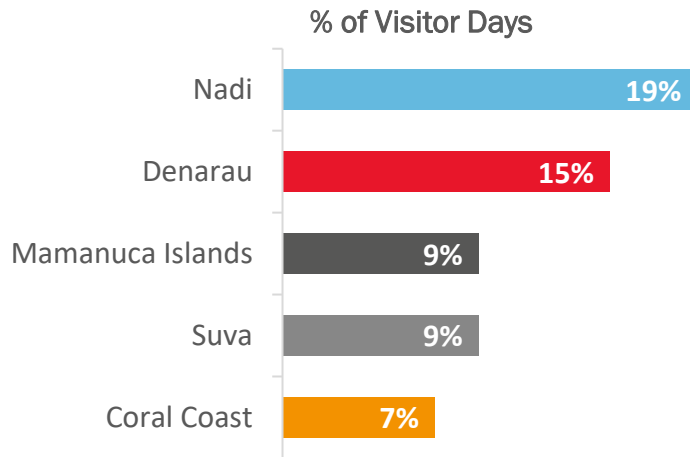


The U.S. market was mainly first-timers travelling as couples. Their average household income was slightly more than US\$125K. The main source of information on Fiji came from Internet searches and travel websites. Fiji appealed to those looking for a new adventure. Others came because Fiji was a dream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

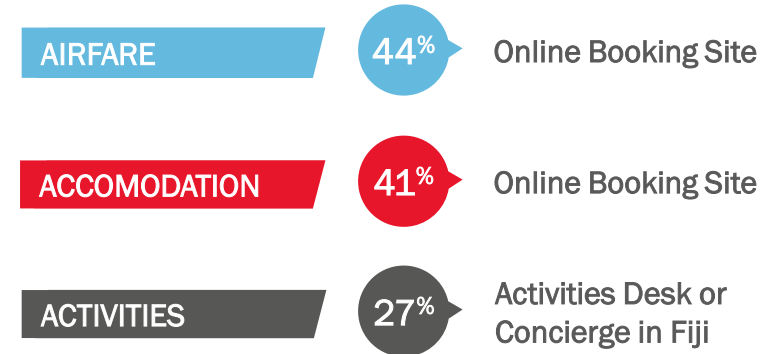
*Multiple responses, therefore, totals do not add up to 100%.



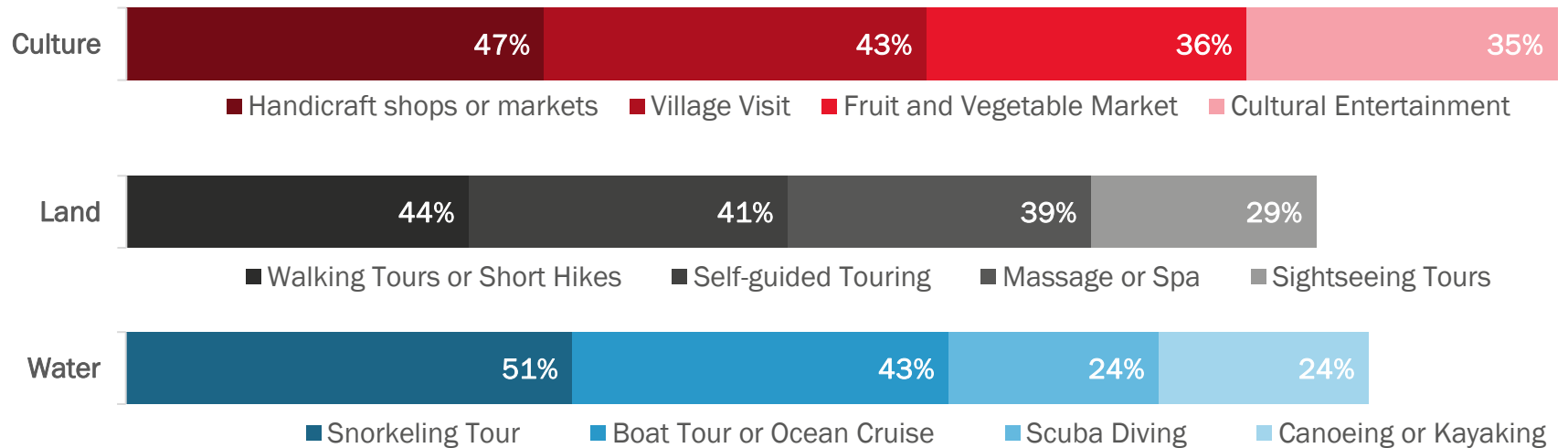
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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



13,269

TOTAL VISITORS

FJD 104M

TOTAL SPEND

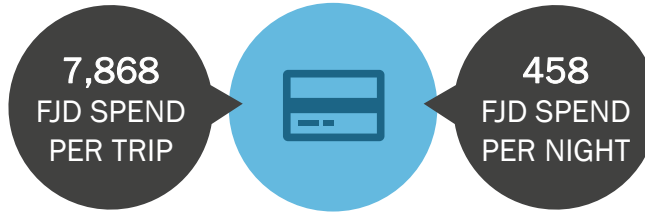
FJD 71M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



SPEND



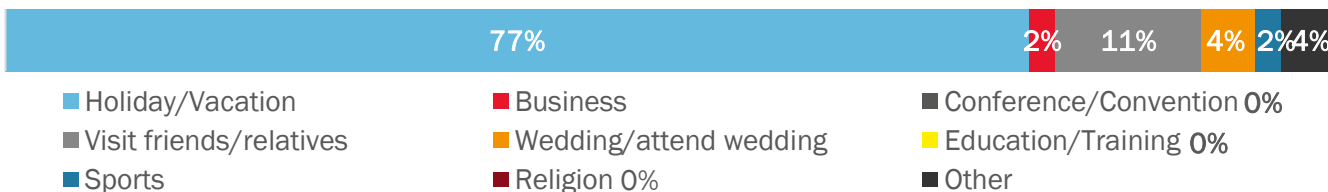
SATISFACTION



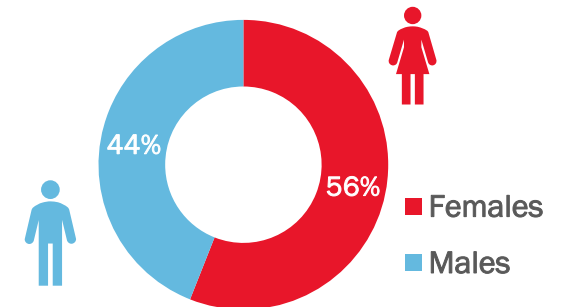
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

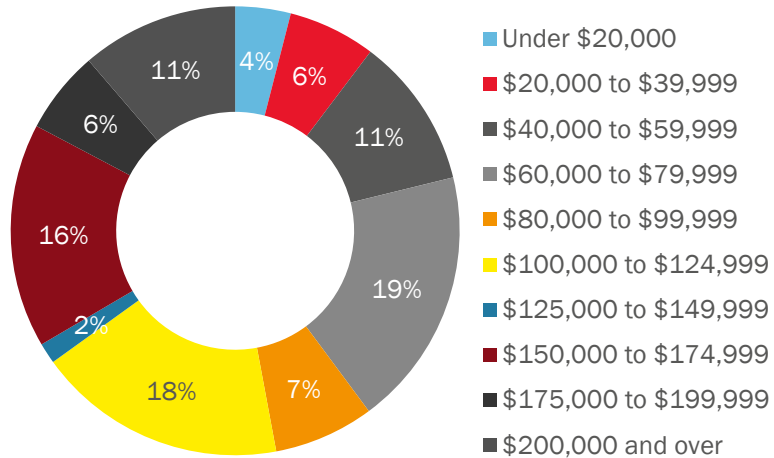


The Canadian market accounted for only 1.5 percent of the visitations and growth was flat at +0.4% over 2018. Canadian visitors spent twice as long as the average visitor in Fiji and therefore their total spending per person per trip was the highest.

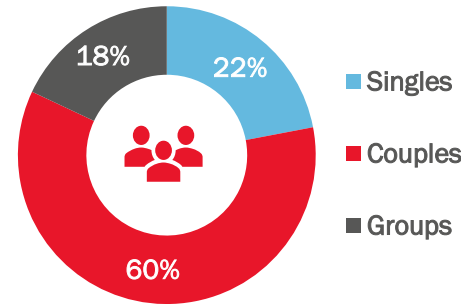
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

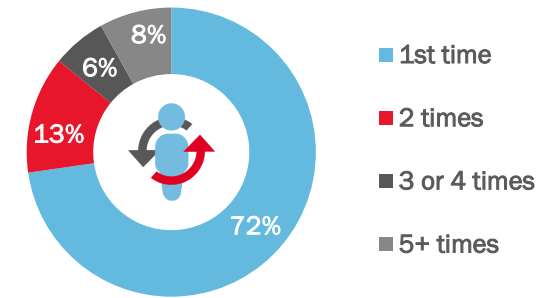
ANNUAL HOUSEHOLD INCOME (CAN\$)



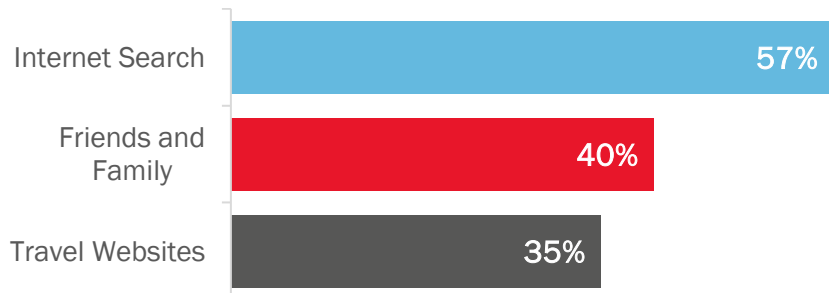
PARTY SIZE



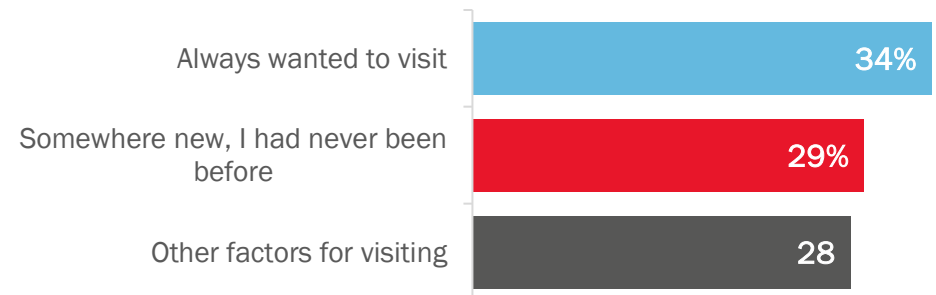
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



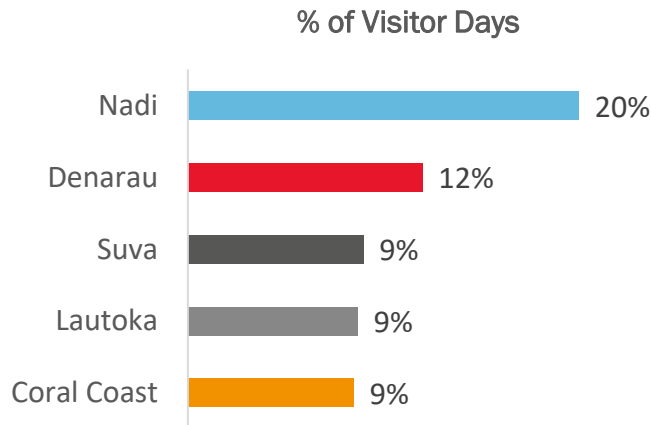
Canadian household income was broadly spread in the middle categories of between CAN\$60K and CAN\$175K. Many Canadians travel in pairs. For most, this was their first trip to Fiji. Online sources such as Internet searches and travel websites were major sources of information but also word of mouth from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

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

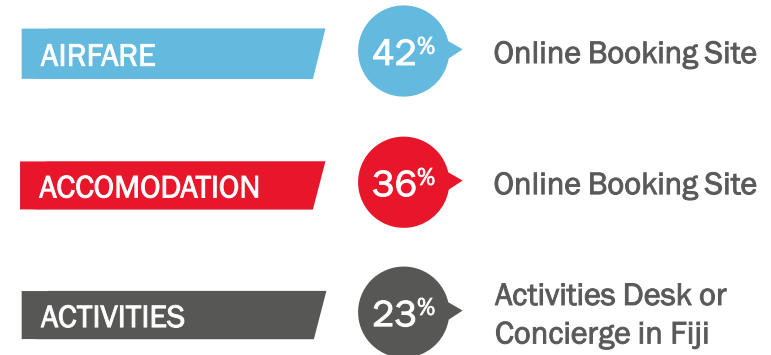
Note: Sample size is relatively small.



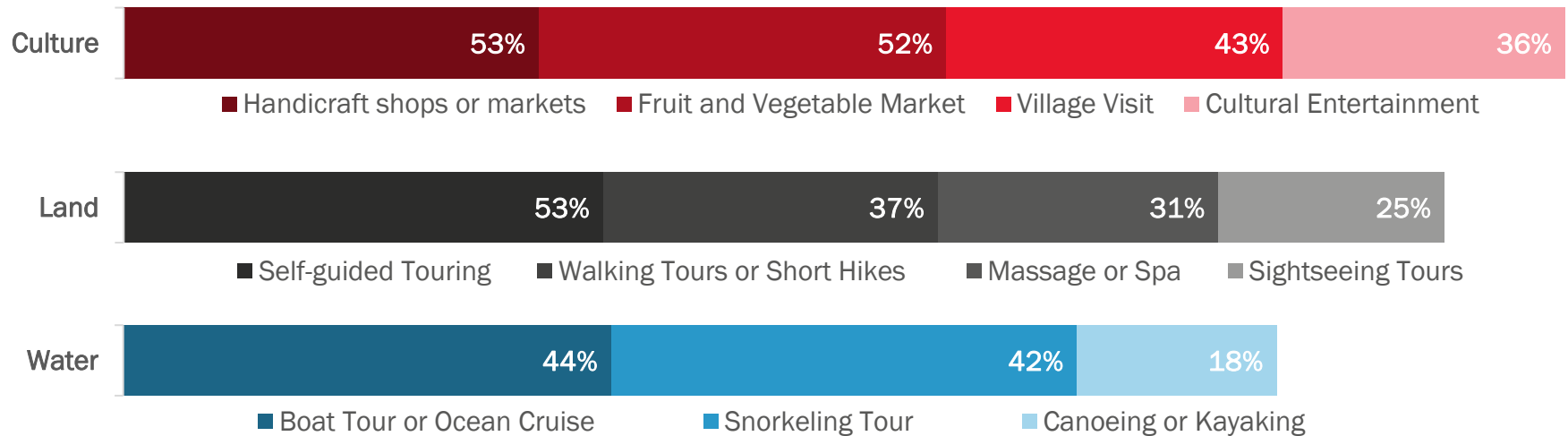
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



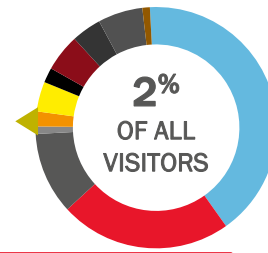
Beside a slight preference for Nadi, Canadians were distributed similarly across Denarau, Suva, Lautoka, and Coral Coast. Airfare and accommodations were mainly booked through online sites. Canadians took advantage of cultural experiences with many visiting handicraft and fruit markets and also participating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

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

Note: Sample size is relatively small.

2019

UNITED KINGDOM



16,856

TOTAL VISITORS

FJD 77M

TOTAL SPEND

FJD 55M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



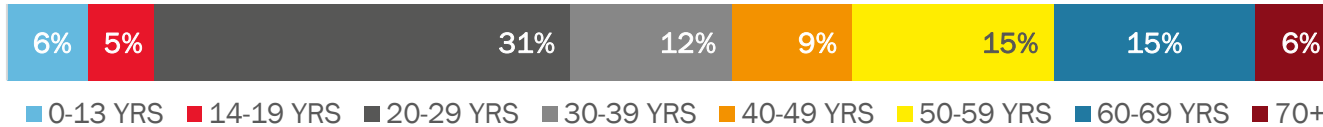
SPEND



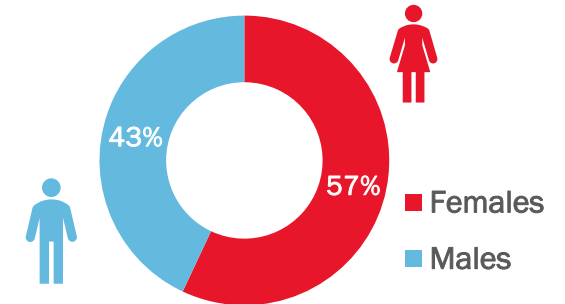
SATISFACTION



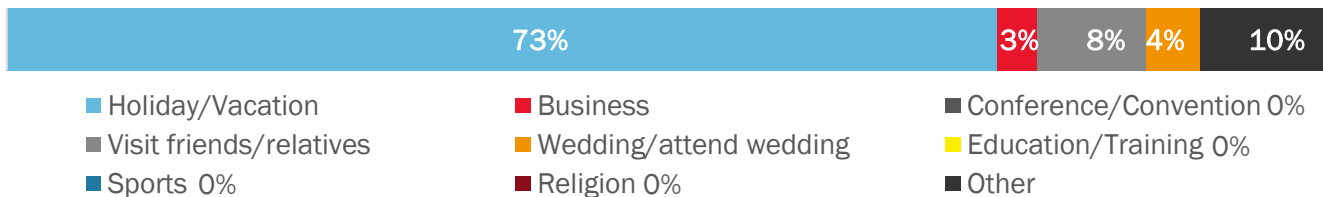
AGE OF ALL VISITORS



GENDER



PURPOSE OF VISIT (%)

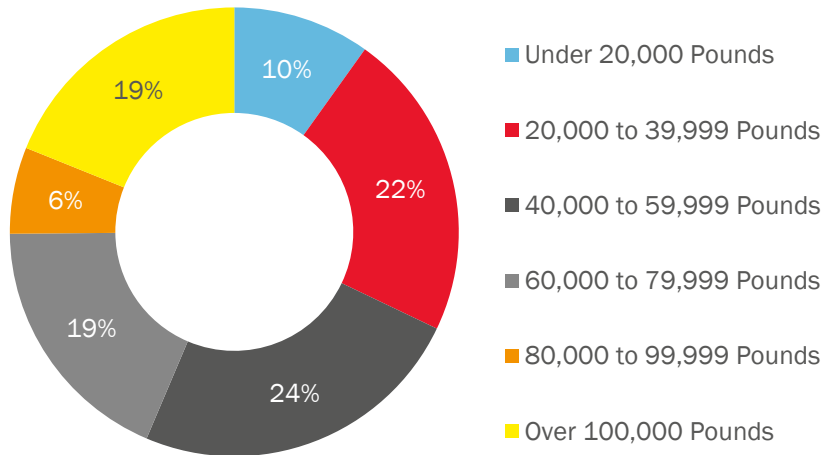


The number of visitors from the UK increased +3.4% over last year. UK visitors were more satisfied than most other visitors. There were slightly more females than males visiting. The greater part of the spending was committed through the pre-paid package and the international airfare (71%).

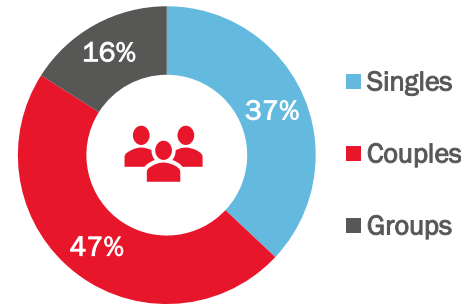
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

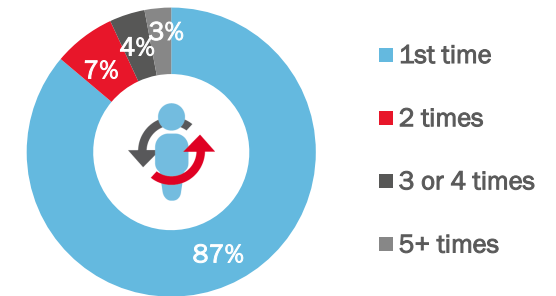
ANNUAL HOUSEHOLD INCOME (GBP)



PARTY SIZE



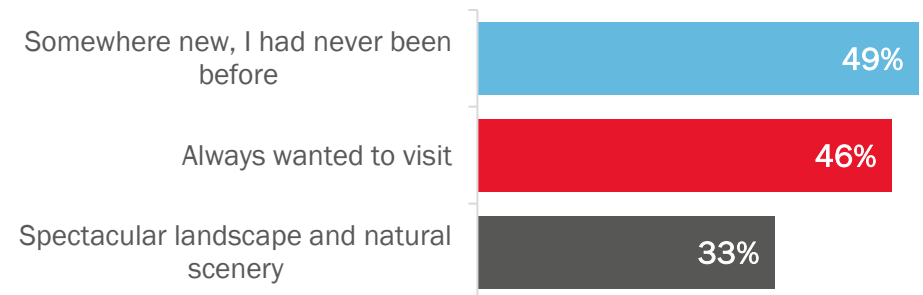
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



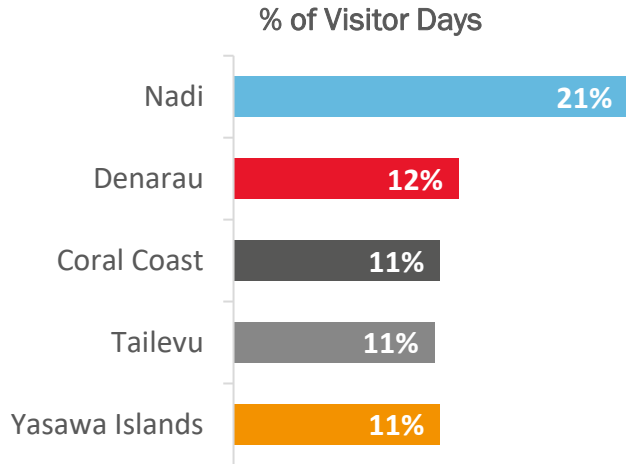
More than half of the visitors had an income of less than £60K. Almost 4-in-10 British visitors were traveling alone, with mostly all being their first trip to Fiji. Like the Americans, Internet search was the predominate source of information for the British, with additional support from travel websites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

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

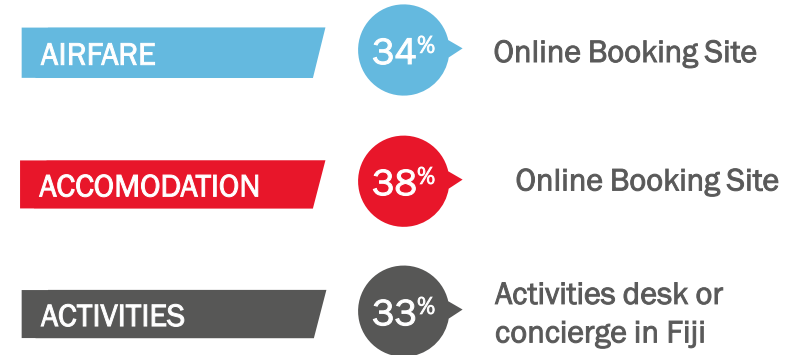
Note: Sample size is relatively small.



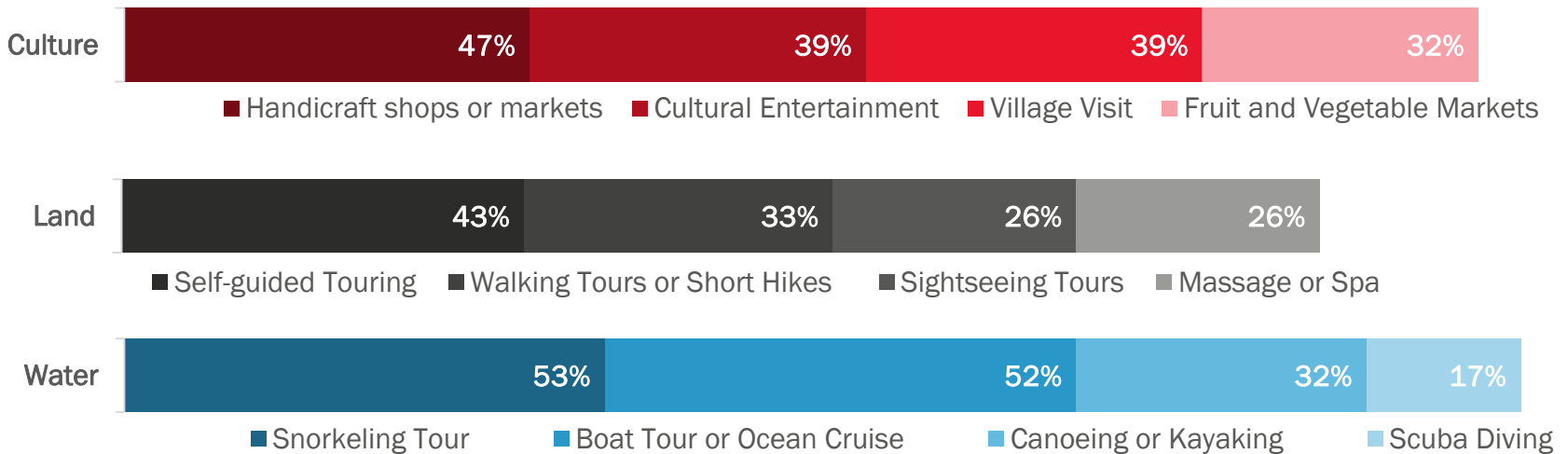
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



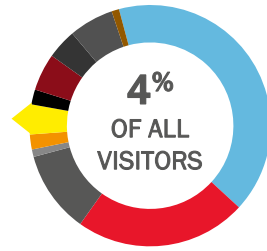
Beyond visits to Nadi, British visitors were equally likely to be found in Denarau, Coral Coast, Tailevu, or the Yasawa Islands. The main method for booking airfare and accommodations was through online booking sites. A third of visitors booked activities after arriving in Fiji. More than half did snorkelling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

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

Note: Sample size is relatively small.

2019

CONTINENTAL EUROPE



36,058

TOTAL VISITORS

FJD 212M

TOTAL SPEND

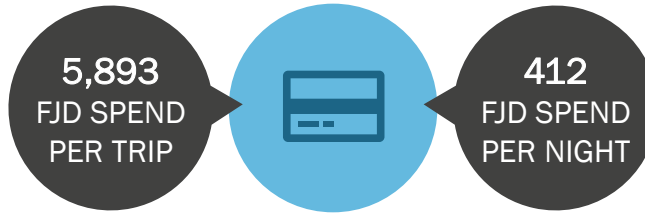
FJD 146M

PRE-PAID SPEND

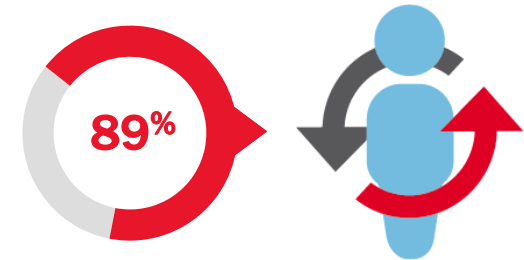
AVERAGE LENGTH OF STAY



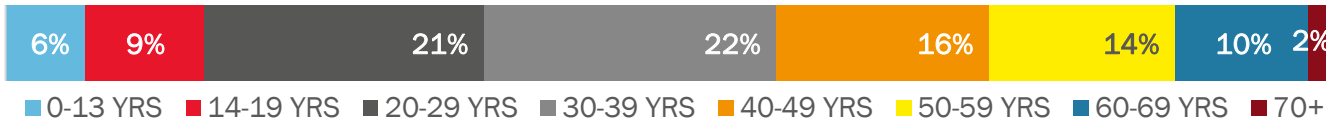
SPEND



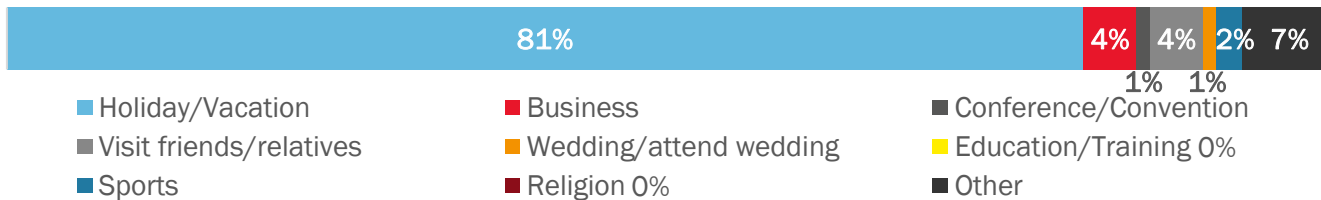
SATISFACTION



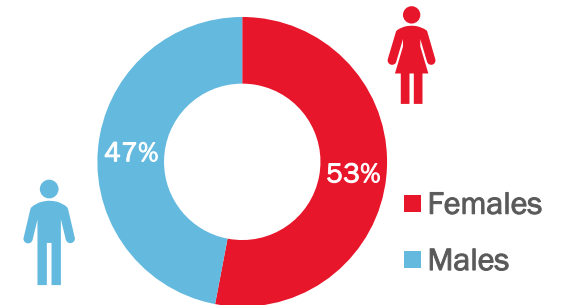
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



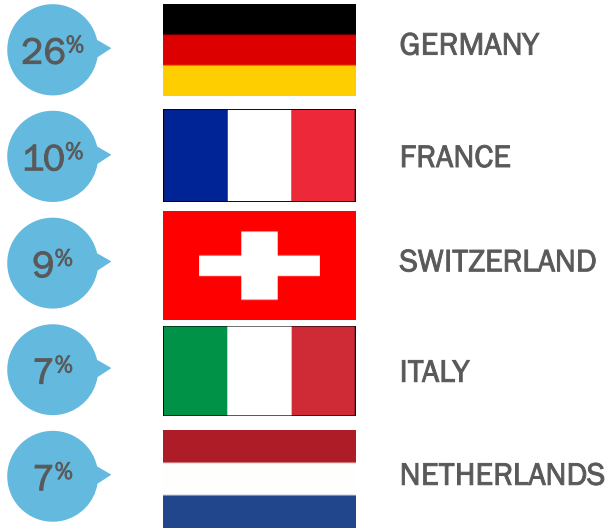
GENDER



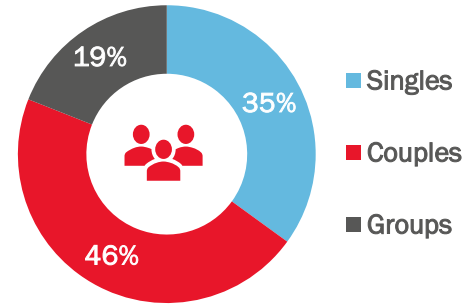
European travellers accounted for 4% of all visitors and actually showed a decline in visitation for 2019 (-3.7%). They stayed the third longest amongst all the major markets (14.3 nights) and were also younger. Compared to their U.K. neighbours, they spent slightly more per night and for their total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

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

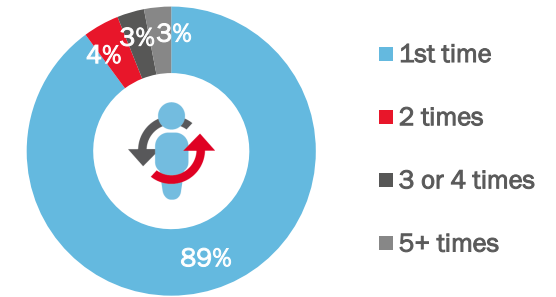
TOP 5 EUROPEAN COUNTRIES



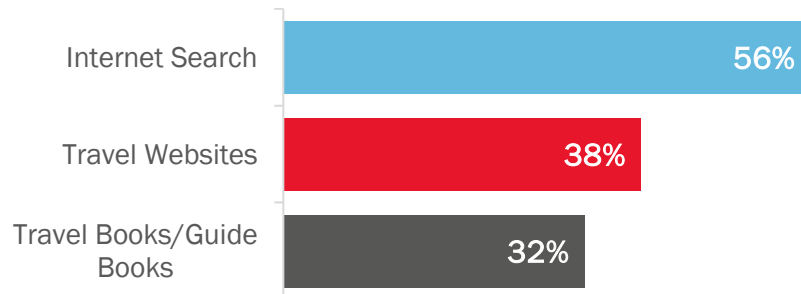
PARTY SIZE



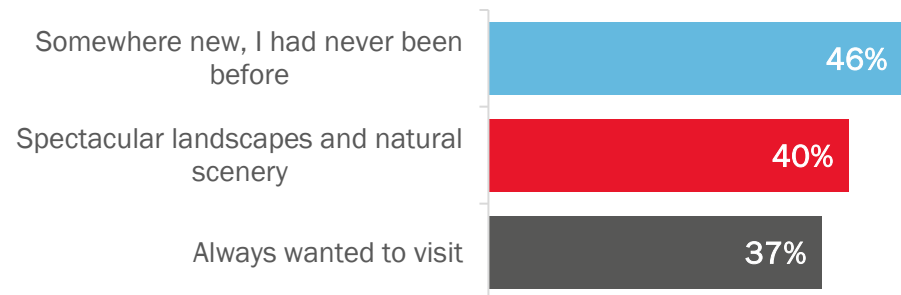
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*

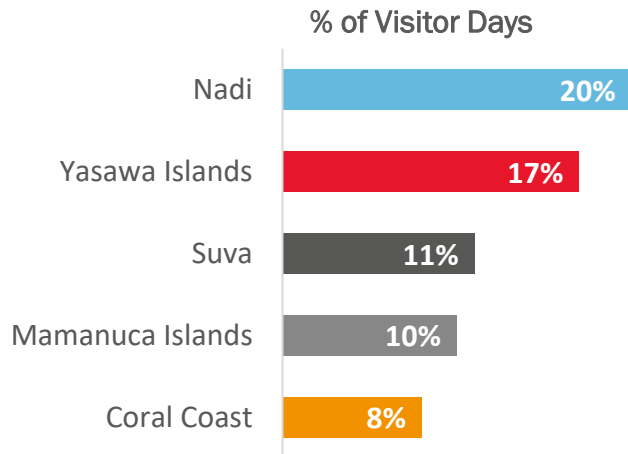


The predominate country from Continental Europe was Germany. Many Continental Europeans came as couples but also solo travellers. Almost all were first-timers to Fiji. Internet searches and to a lesser extent travel websites and guidebooks provided planning information for this trip. Fiji appealed to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

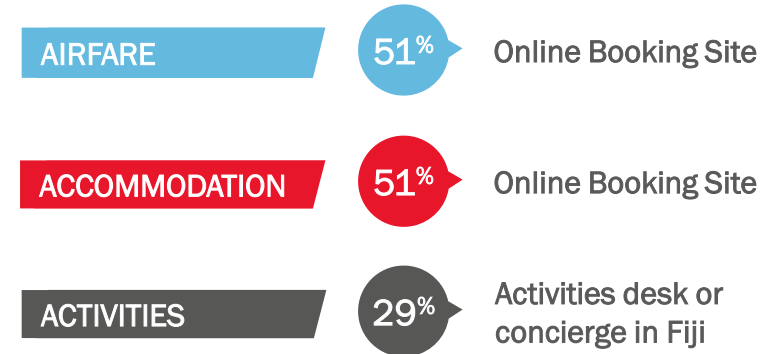
*Multiple responses, therefore, totals do not add up to 100%.



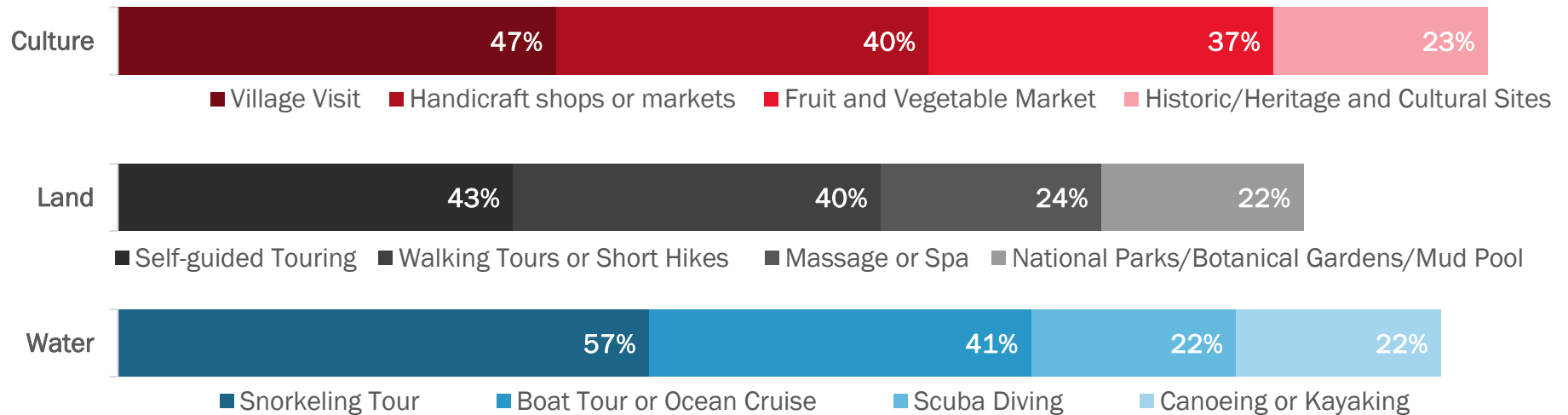
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

2019

JAPAN



14,868

TOTAL VISITORS

FJD 47M

TOTAL SPEND

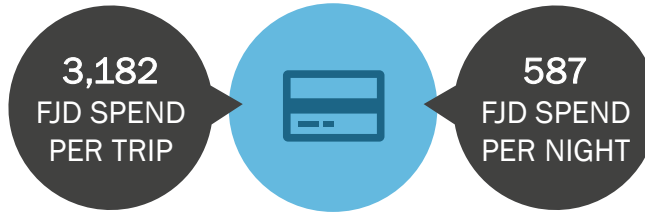
FJD 36M

PRE-PAID SPEND

AVERAGE LENGTH OF STAY



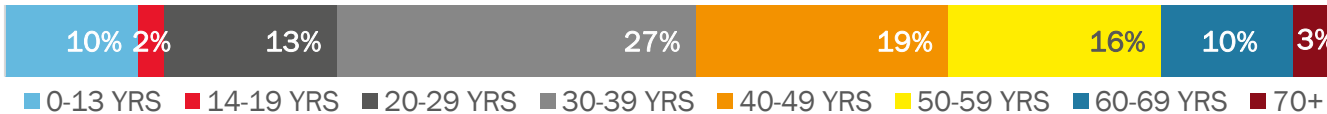
SPEND



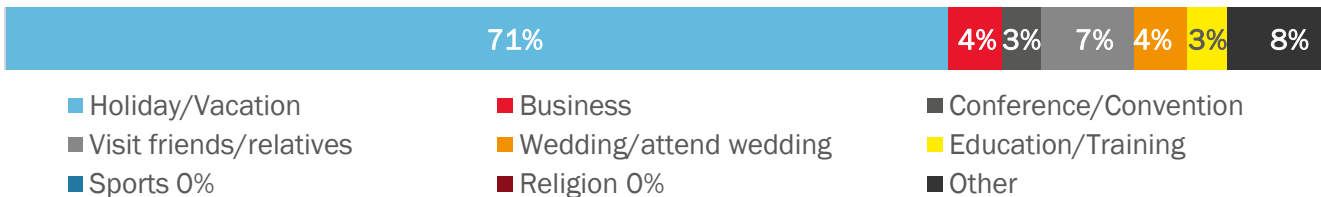
SATISFACTION



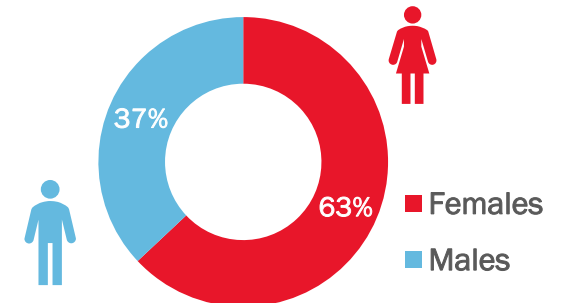
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

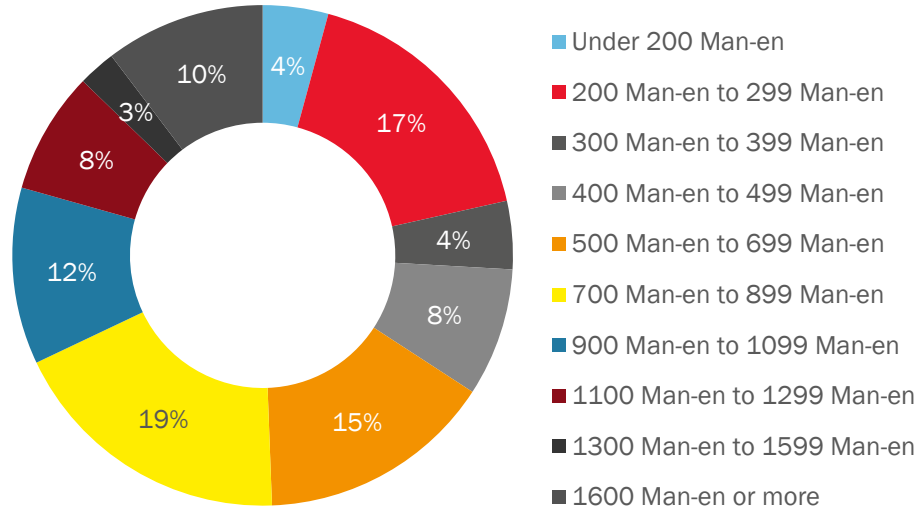


Japan is a promising growth market with a +24.9% increase in arrivals and accounted for 2% of visitors. Daily spending (\$587 per person per night) was the highest among the major markets with much of the spending done before arrival (77%). Two out of every three Japanese visitors were female, and 45%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

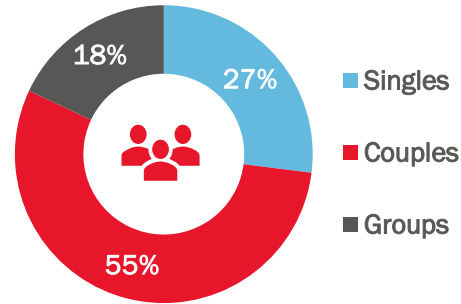
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

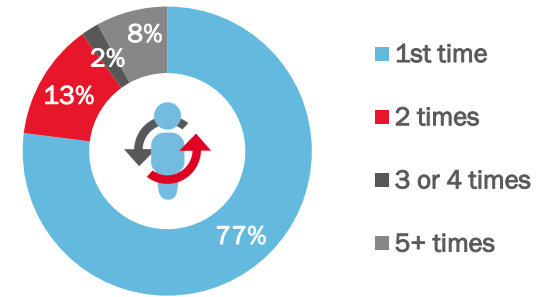
ANNUAL HOUSEHOLD INCOME (JPY)*



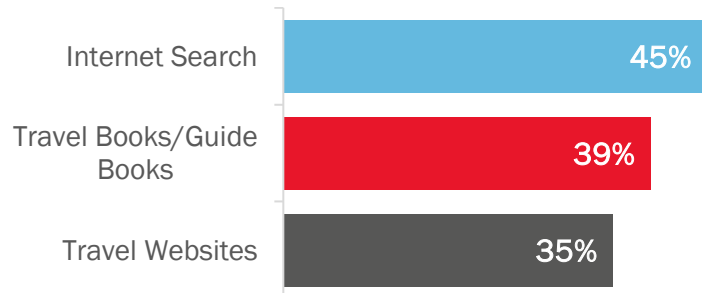
PARTY SIZE



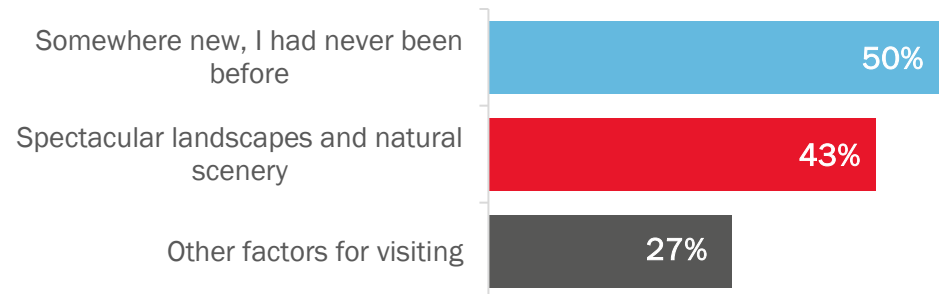
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING**



TOP INFLUENCING FACTORS FOR VISITING*



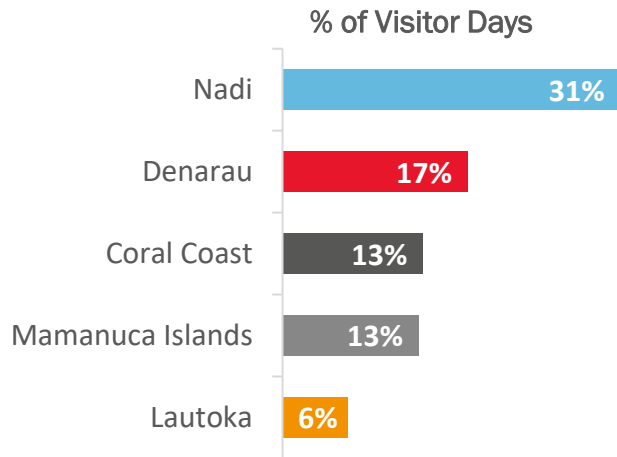
Household income was concentrated between 500 Man-en* (5 million) and 900 Man-en but there was also a group in the 200-299 Man-en category. Half of the visitors travelled in pairs and another third travelled alone. The vast majority were first-timers. Internet searches was the top source for planning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

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

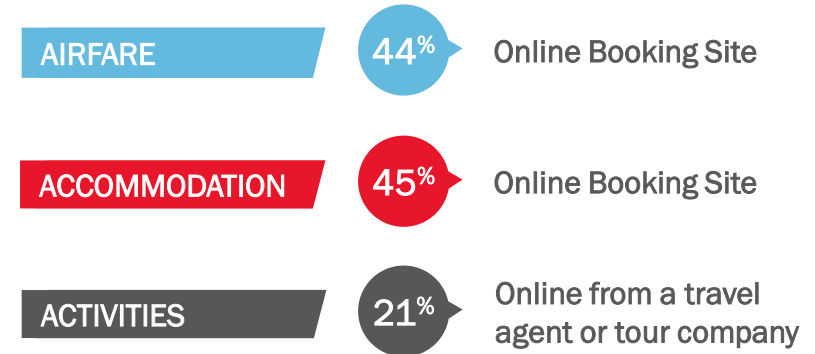
Note: Sample size is relatively small.



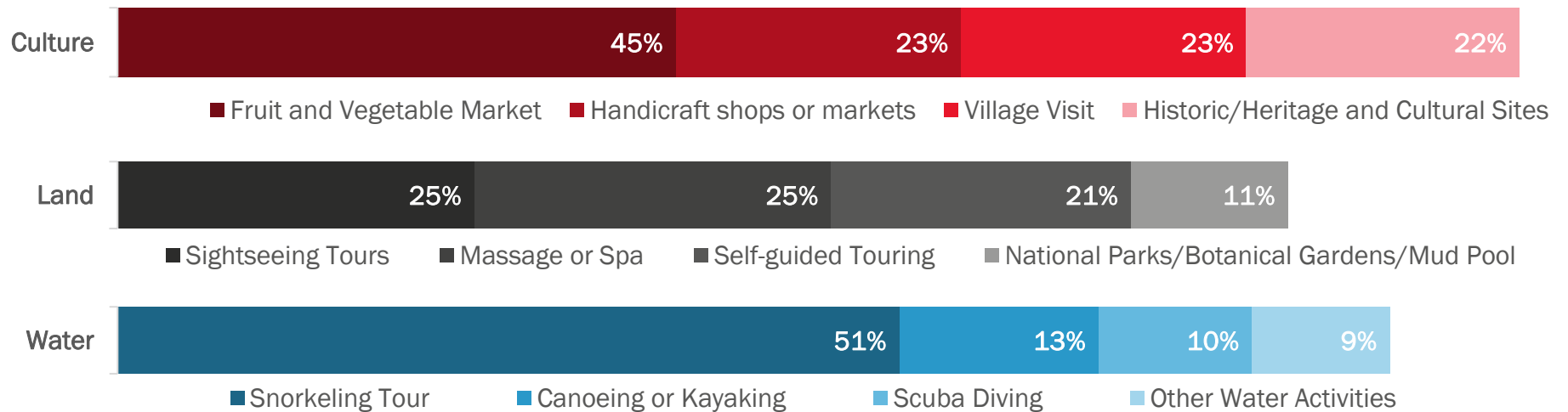
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

Note: Sample size is relatively small.

2019

CHINA

*Includes Hong Kong



49,169

TOTAL VISITORS

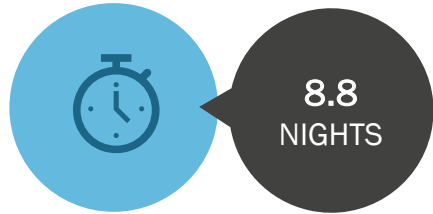
FJD 236M

TOTAL SPEND

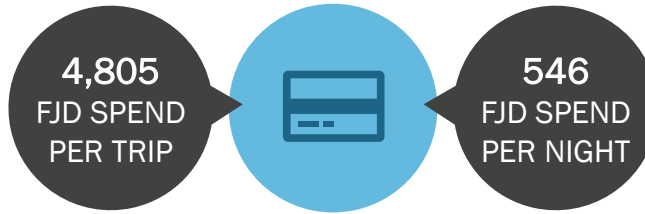
FJD 135M

PRE-PAID SPEND

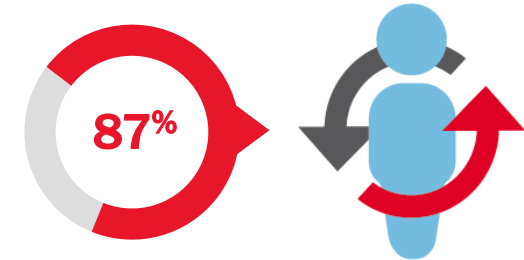
AVERAGE LENGTH OF STAY



SPEND



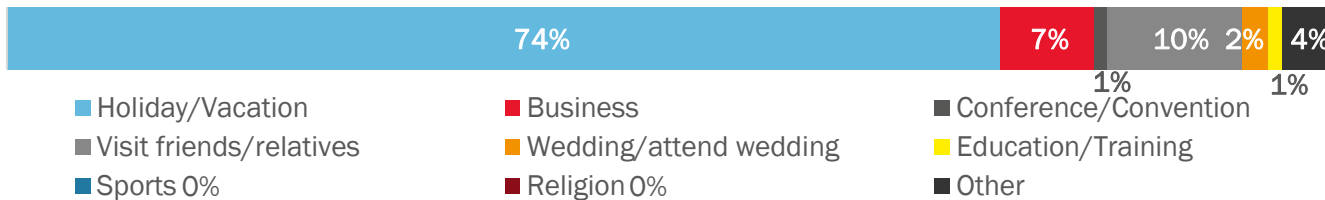
SATISFACTION



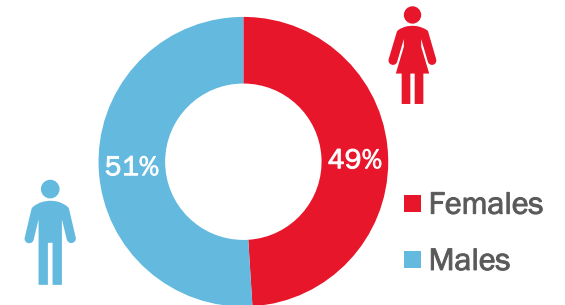
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



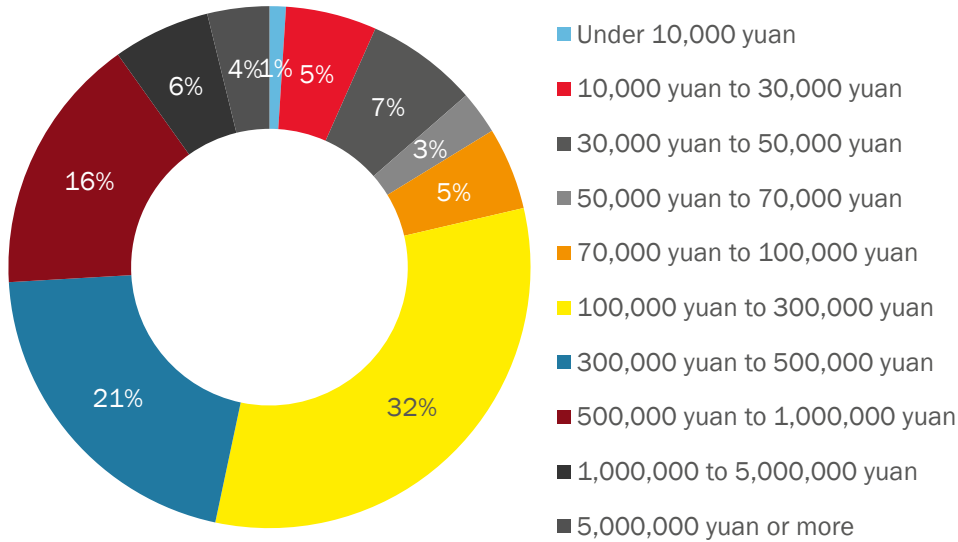
China was the largest source market out of Asia, with 5.5% of all arrivals. However, visitation was down -2.3% in 2019, even with a spike in Hong Kong visitors (+101.9%) . Chinese visitors spent only 8.8 nights on average. Visitors were split almost evenly between men and women. Chinese visitors spent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

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

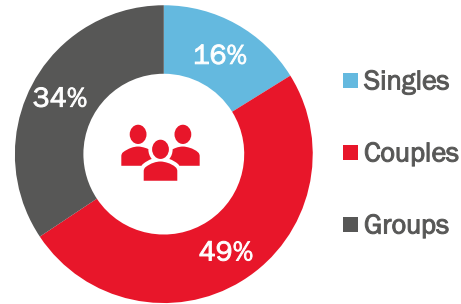
Note: Sample size is relatively small.

ANNUAL HOUSEHOLD INCOME (CNY)

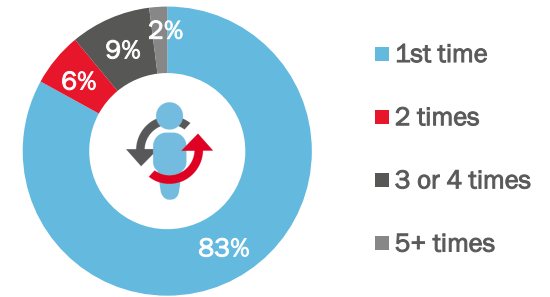
*Includes Hong Kong



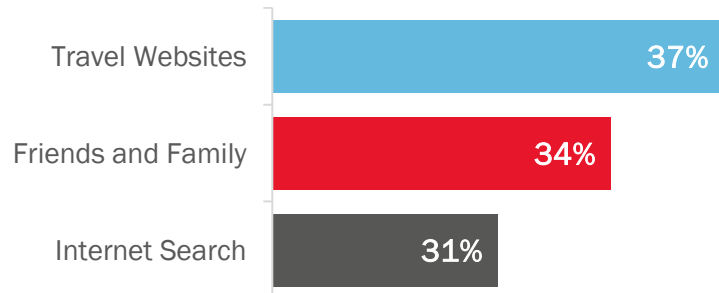
PARTY SIZE



NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



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

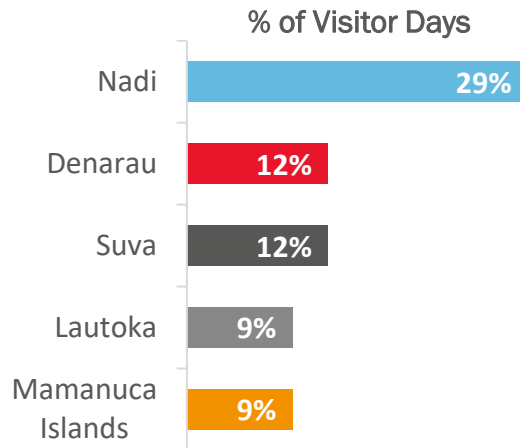
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

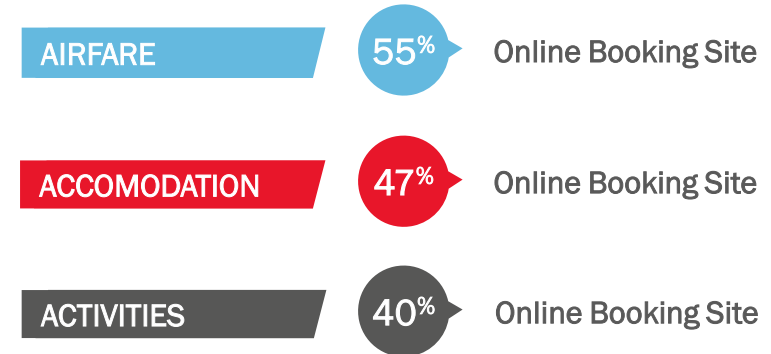
*Includes Hong Kong



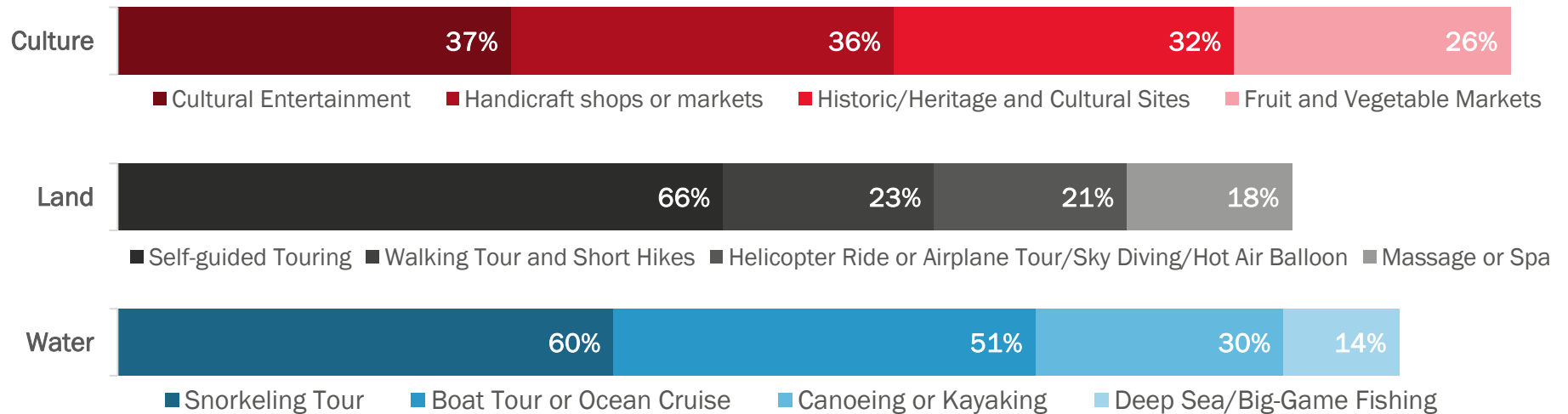
TOP 5 REGIONS VISITED*



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

Note: Sample size is relatively small.

2019

OTHER ASIA*



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

34,569

TOTAL VISITORS

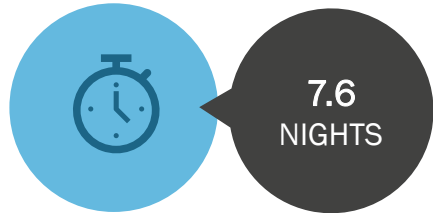
FJD 108M

TOTAL SPEND

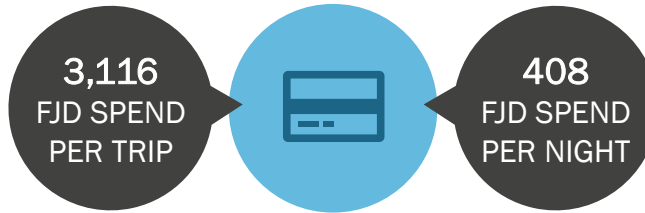
FJD 74M

PRE-PAID SPEND

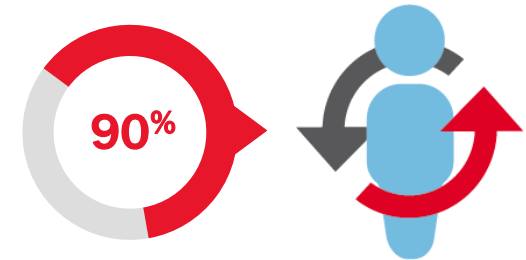
AVERAGE LENGTH OF STAY



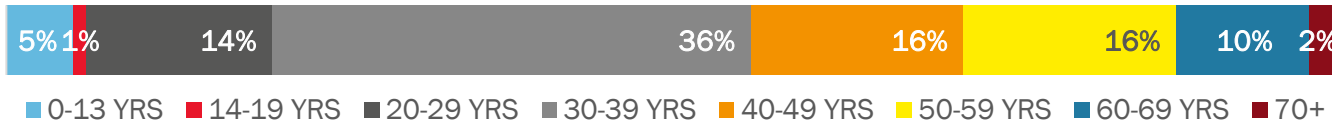
SPEND



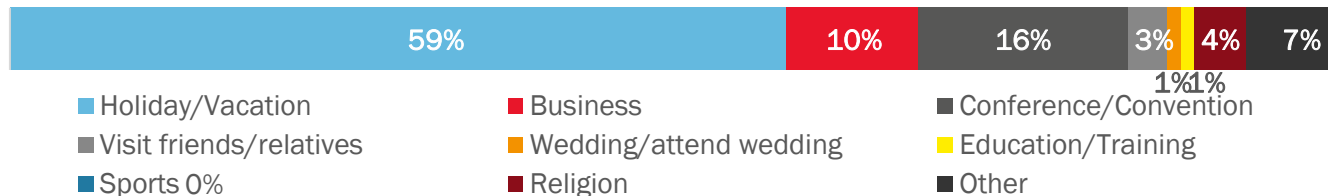
SATISFACTION



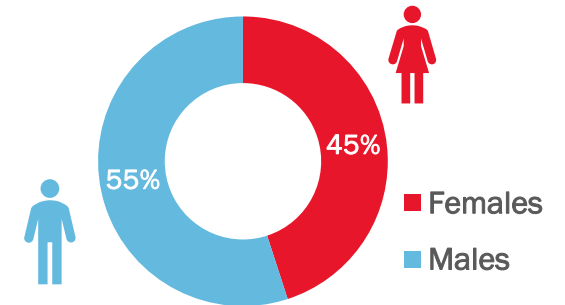
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER



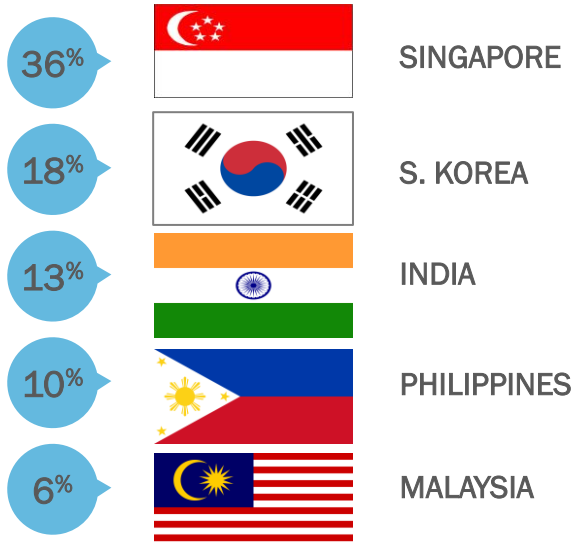
The other countries of Asia grew +1.6% and accounted for another 4% of total visitors. Much of that growth came from India (+5.6%) which compensated for the loss in South Korea visitors (-16.8%). Visitors were more likely to be men in their 30's. They stayed for a short period of 7.6 nights.

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

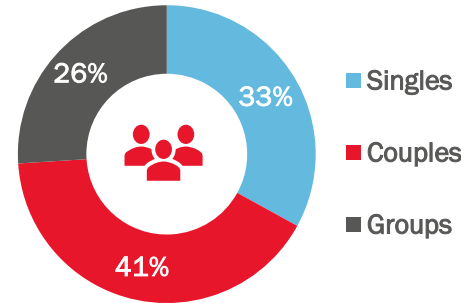
Note: Sample size is relatively small.

*Including, Korea, India, and other Asian countries

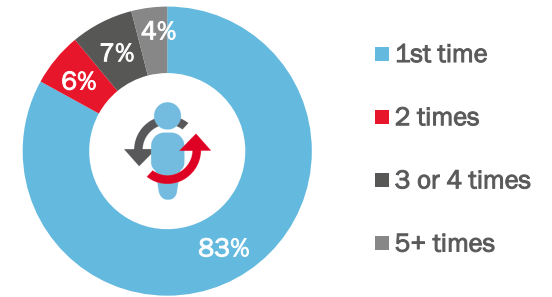
TOP 5 ASIAN COUNTRIES



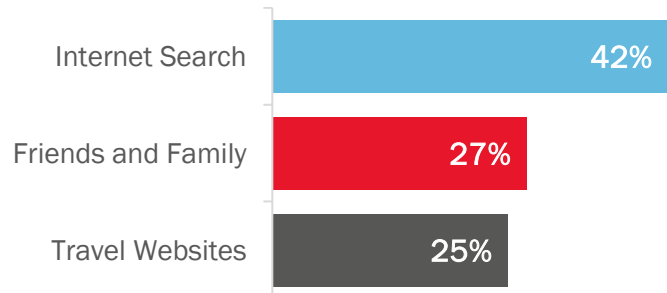
PARTY SIZE



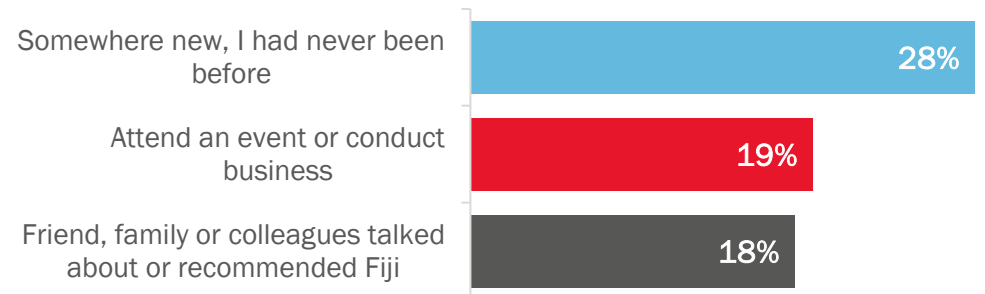
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



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

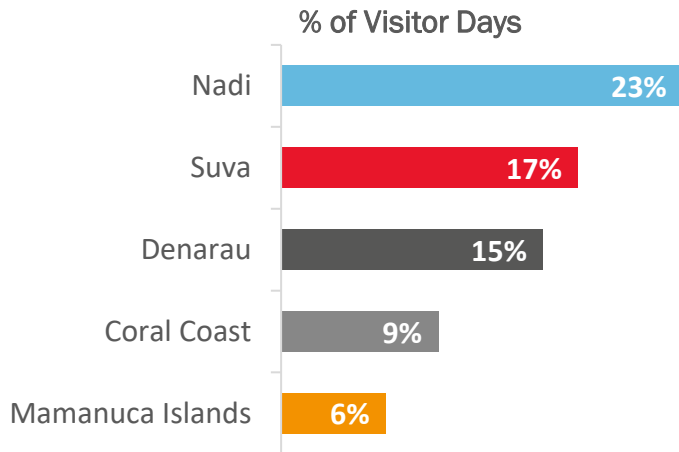
*Multiple responses, therefore, totals do not add up to 100%.

Note: Sample size is relatively small.

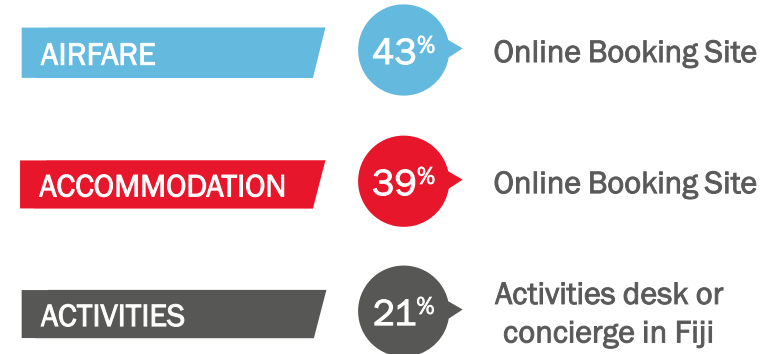
*Including, Korea, India, and other Asian countries



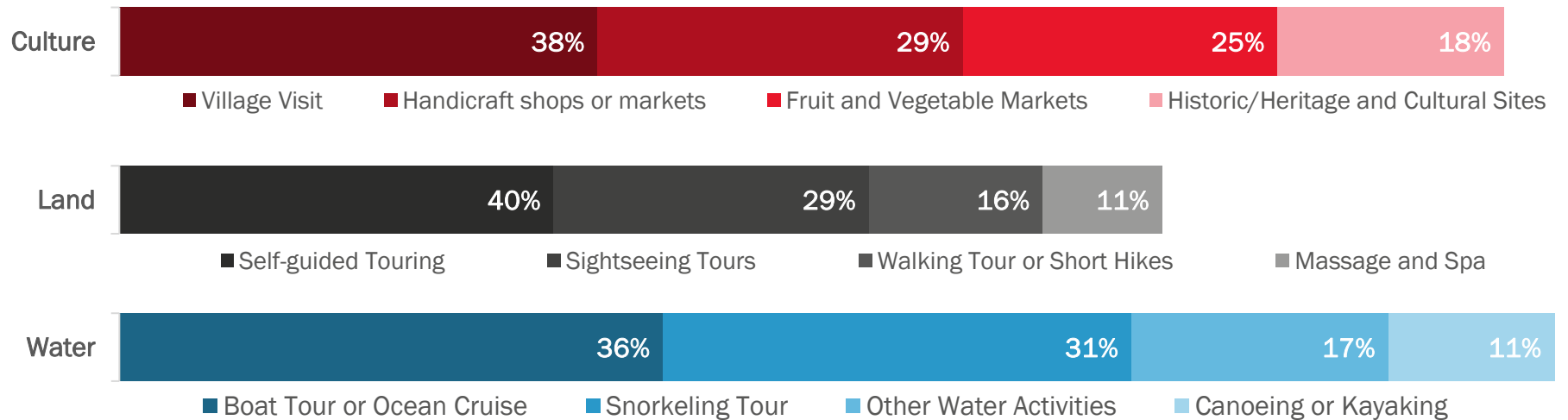
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

Note: Sample size is relatively small.



54,369

TOTAL VISITORS

FJD 388M

TOTAL SPEND

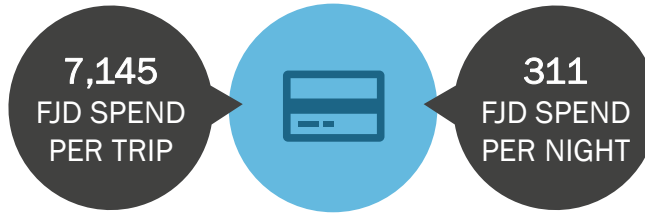
FJD 269M

PRE-PAID SPEND

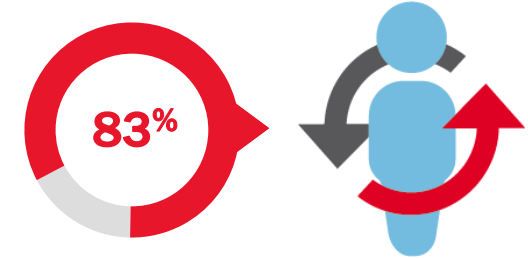
AVERAGE LENGTH OF STAY



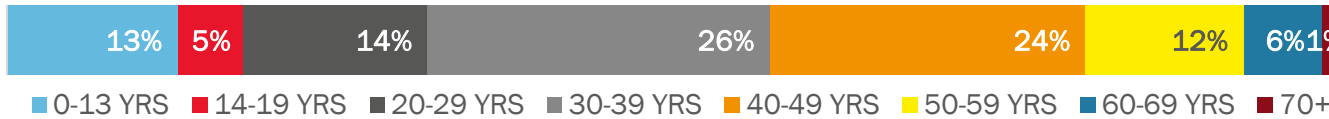
SPEND



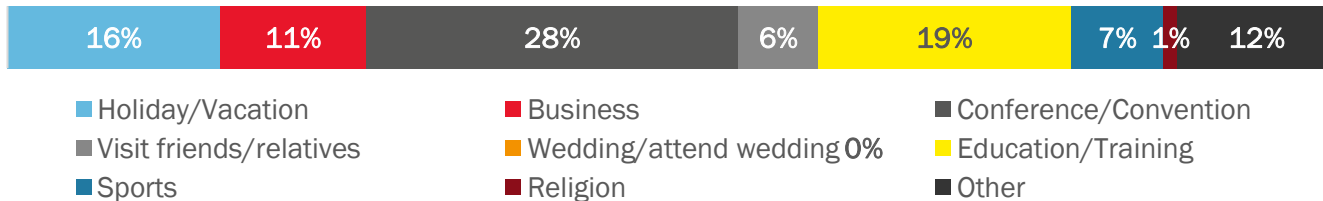
SATISFACTION



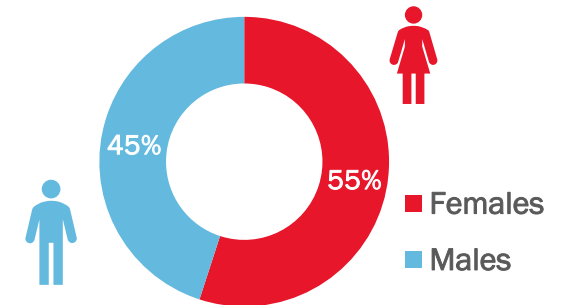
AGE OF ALL VISITORS



PURPOSE OF VISIT (%)



GENDER

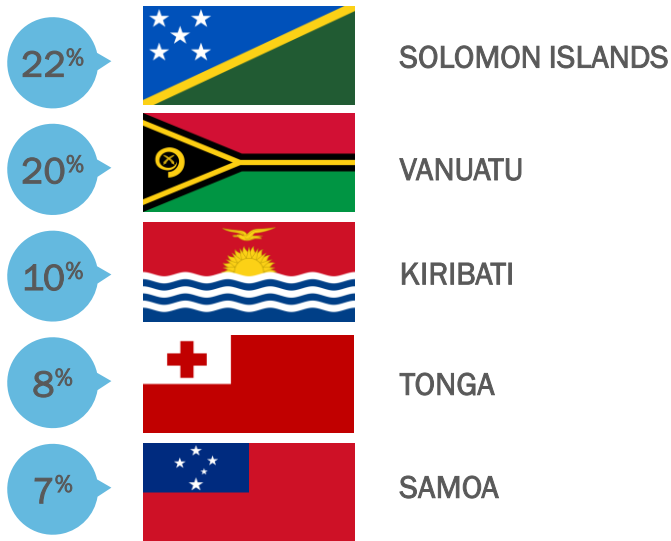


Visitors from the Pacific Islands accounted for 6% of total visitors and showed strong growth of +5.3% over last year. Islanders stayed much longer than the typical visitor (23 nights) which resulted in a high per trip spending

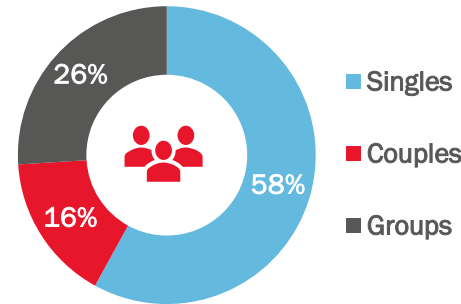
Satisfaction: The percent of visitors who rated a 7 or 10 on a scale where 1=Not at all Satisfied and 10=Extremely Satisfied.

Note: Sample size is relatively small.

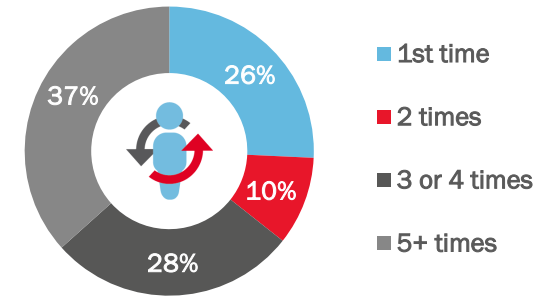
TOP 5 PACIFIC ISLAND COUNTRIES



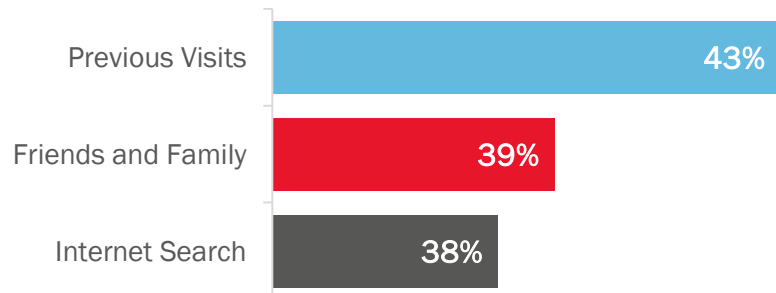
PARTY SIZE



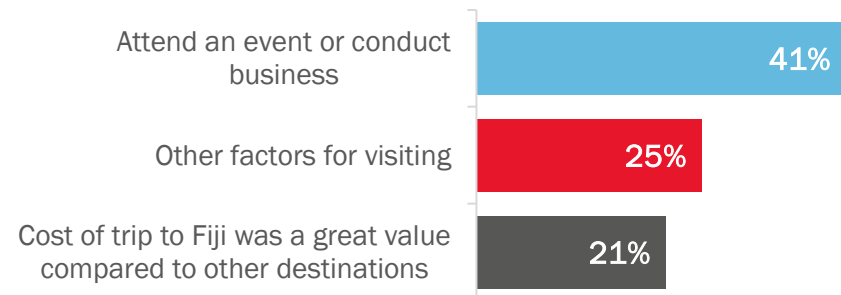
NUMBER OF VISITS



TOP INFORMATION SOURCES USED FOR PLANNING*



TOP INFLUENCING FACTORS FOR VISITING*



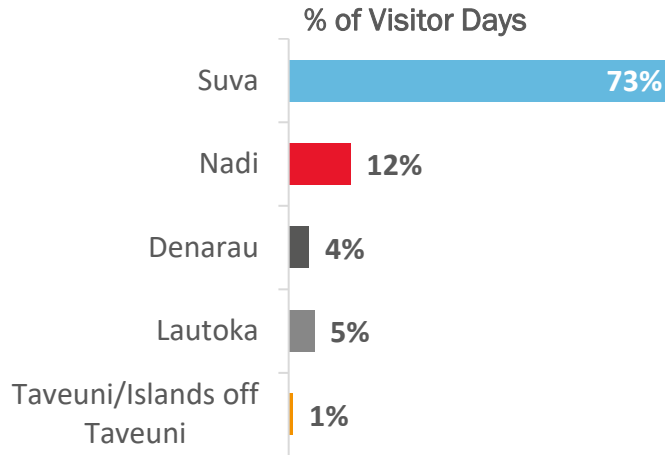
The Pacific Island visitors were represented by large numbers from Solomon Islands and Vanuatu. Most were repeat visitors with over a third having been to Fiji five or more times. Pacific Islanders typically travelled alone and relied on their knowledge from previous trips to Fiji or recommendations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

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

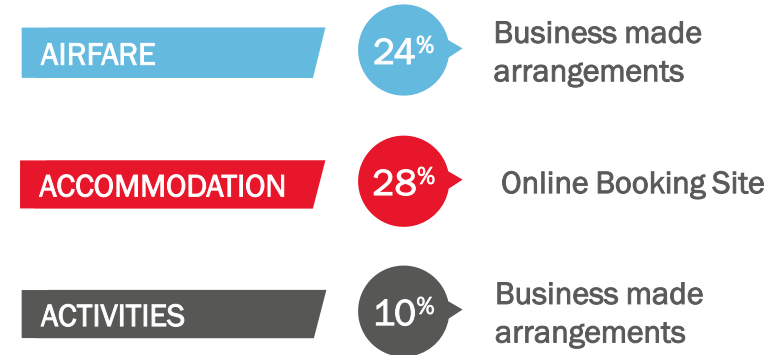
Note: Sample size is relatively small.



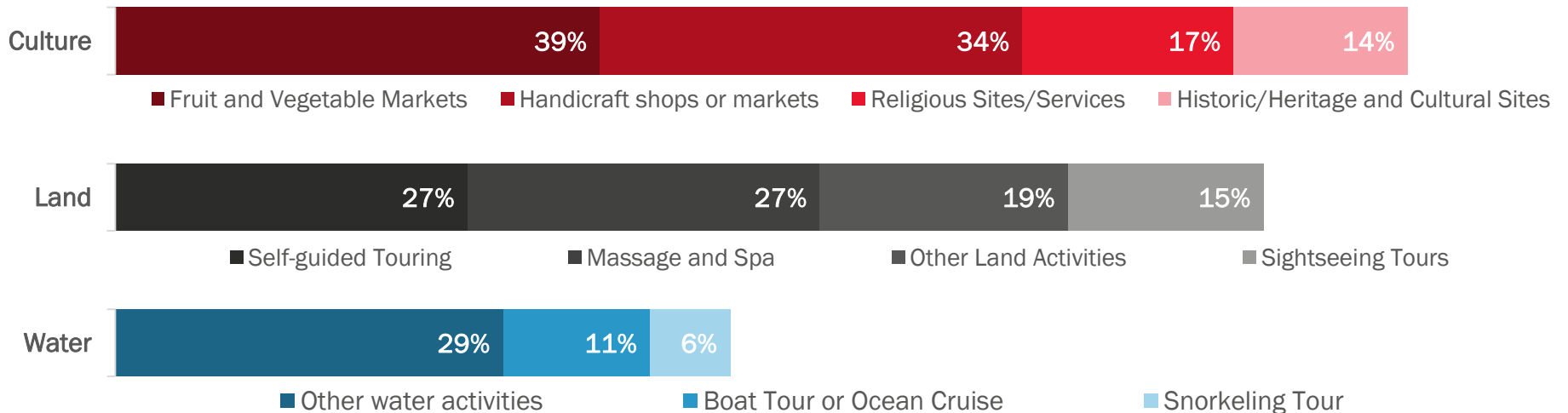
TOP 5 REGIONS VISITED



TOP METHOD FOR BOOKING TRAVEL



TOP ACTIVITIES*



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

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

Note: Sample size is relatively small.

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

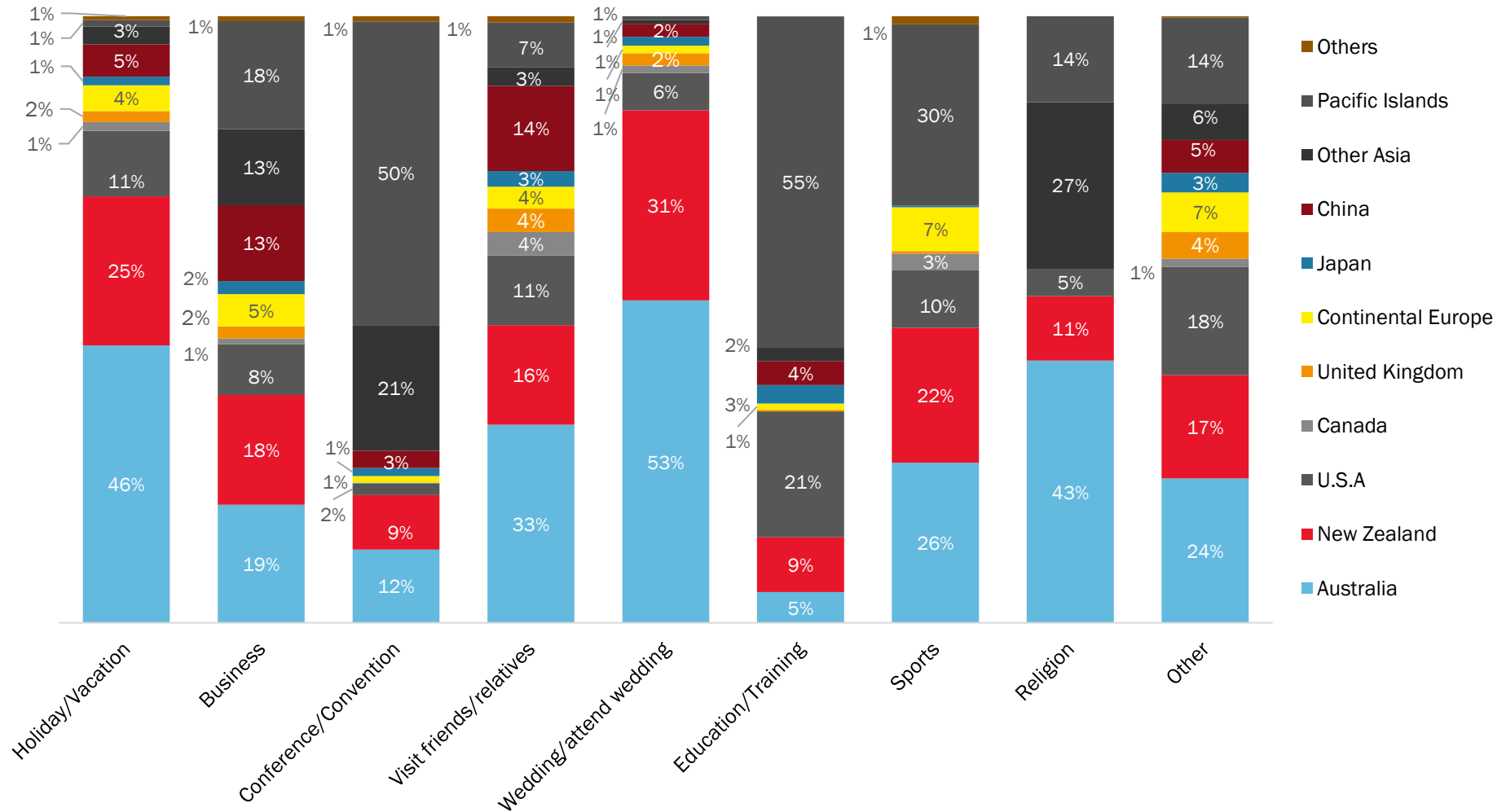
APPENDIX

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

FIJI

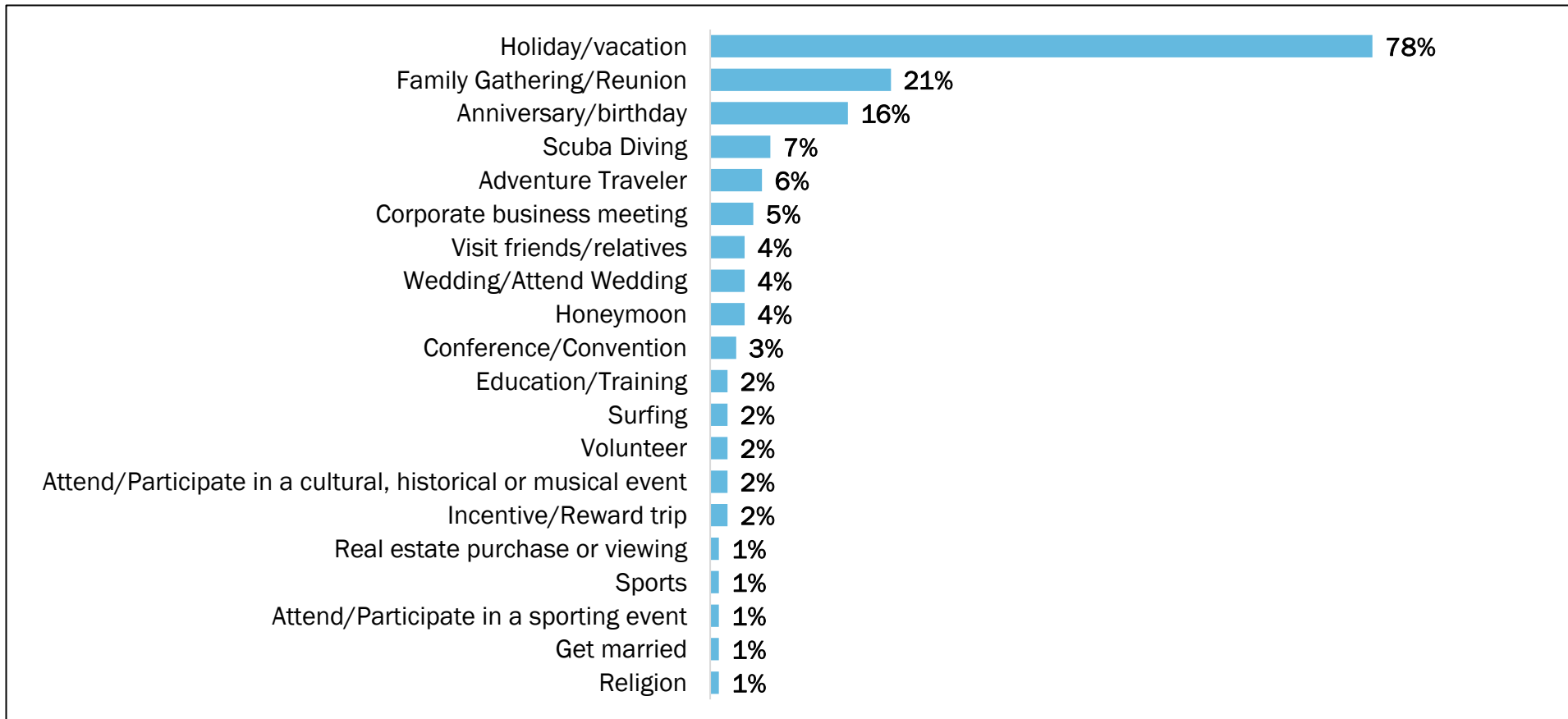


MAIN REASON FOR VISITING FIJI (Percent of visitors by Purpose of Visit)



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

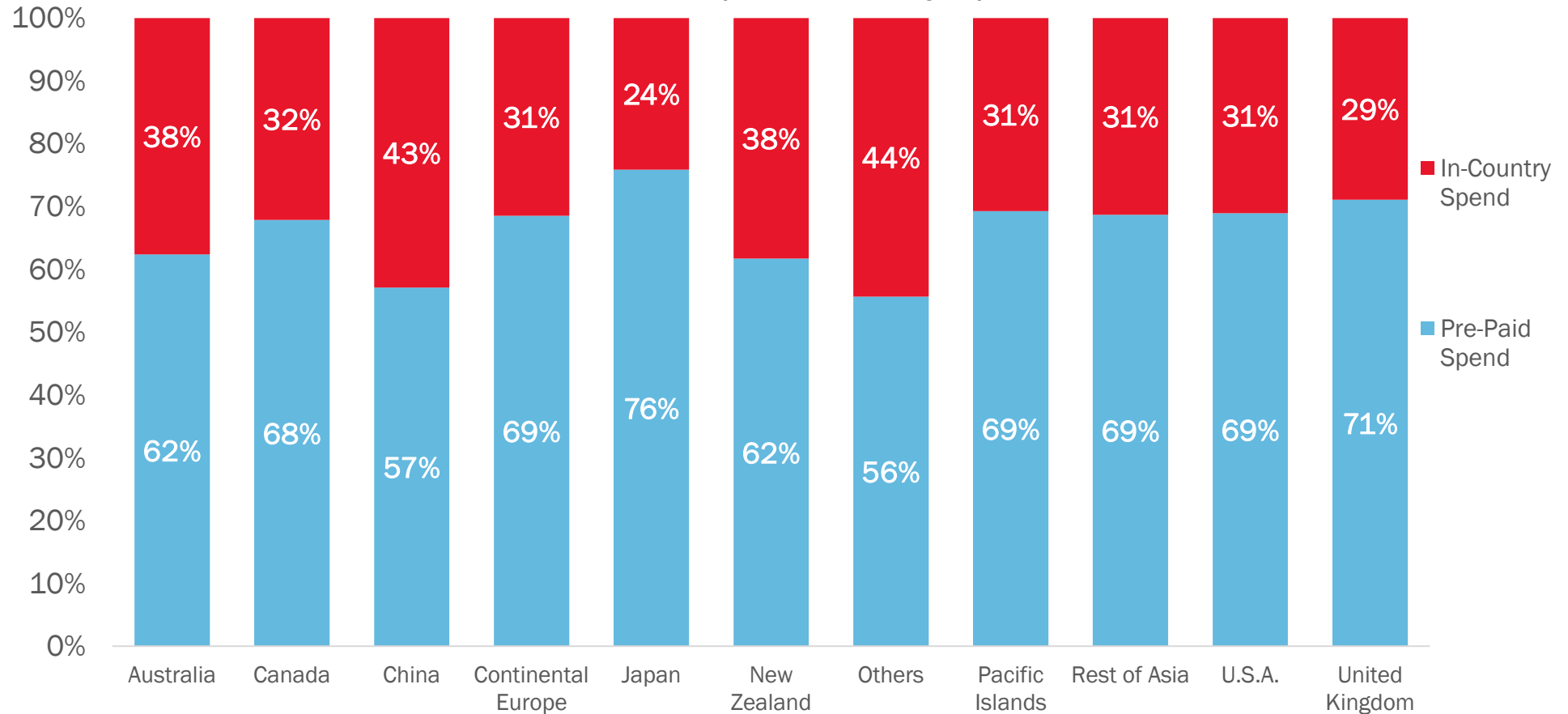
ALL REASONS FOR VISITING FIJI (Percent of Total Visitors*)



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

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

Distribution of Pre-paid and In-Fiji Spend



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

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

RESPONSE RATE DATA

2019 TOTAL VISITORS



205,690

TOTAL NUMBER OF EMAILS SENT



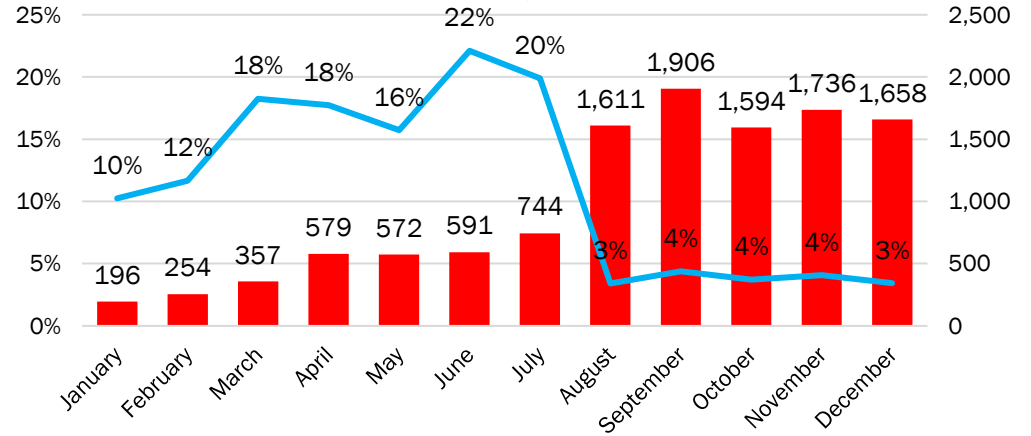
11,798

TOTAL NUMBER OF RESPONSES

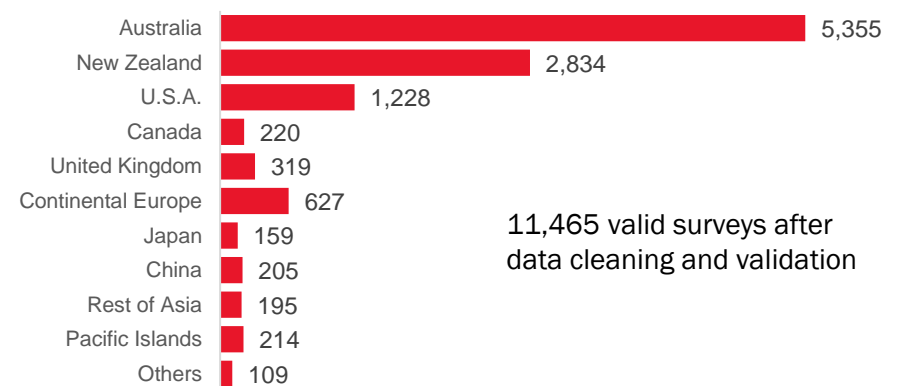
6%

RESPONSE RATE

Response Rate and Surveys Collected for 2019



Valid Complete Surveys



11,465 valid surveys after data cleaning and validation

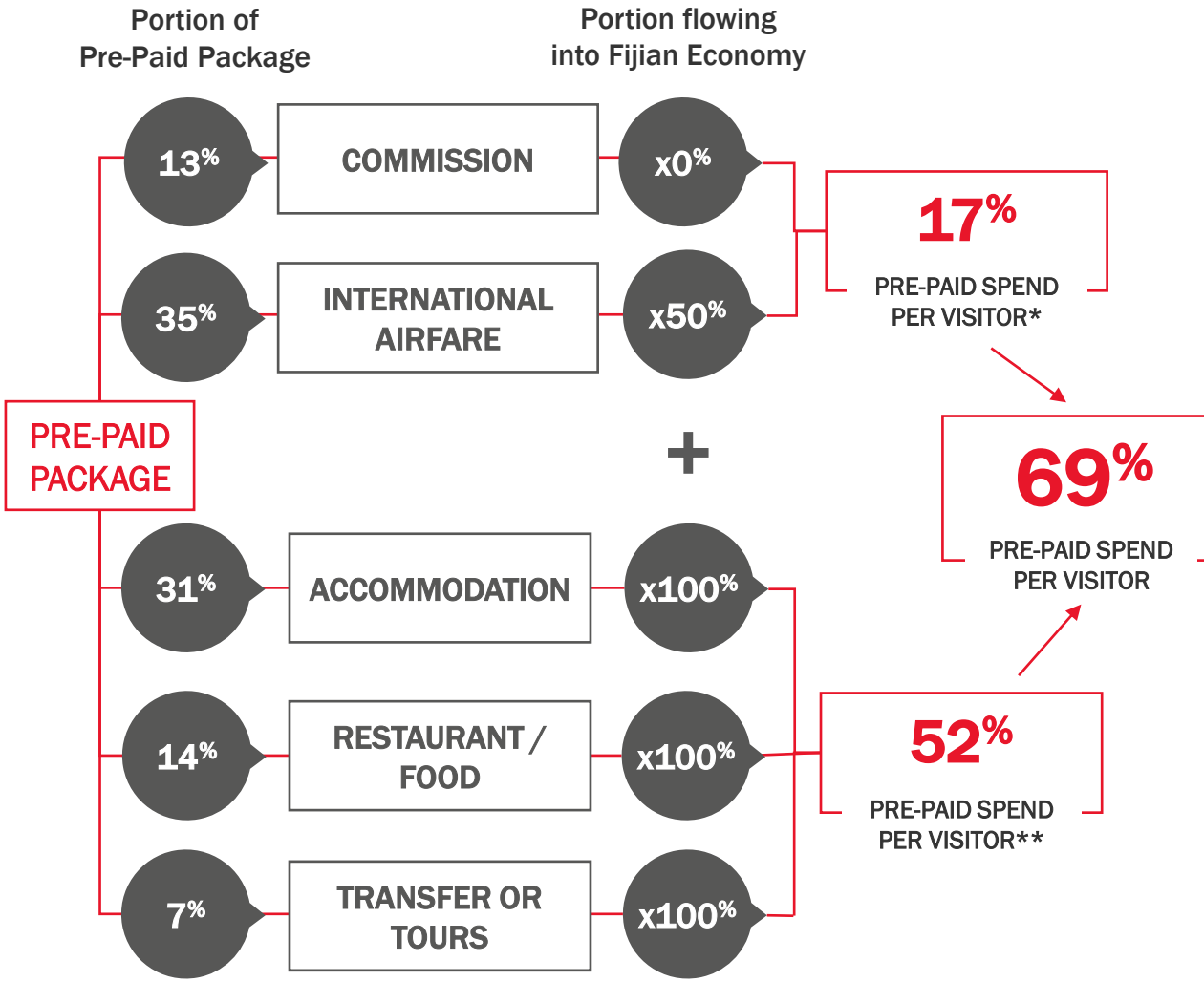
Survey launch was delayed until March 2019 which resulted in lower response rates for the first two months. As data collection at the Nadi International Airport improved, we have also seen higher numbers of completed surveys (45,579 valid email collected, 8,768 completed surveys, 19% response rate).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

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

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

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

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



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

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



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



Prepared by SMS Research & Marketing Services, Inc.

FIJI



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

