

Tourism Resilience & Recovery

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Fiji Hotel and Tourism Association

A person's legs are sticking out of the water, with the feet pointing towards the top left corner. The water is a clear, vibrant turquoise color. In the background, a thin strip of white sand beach is visible, followed by a dark, hazy mountain range under a cloudy sky. The word "Bula." is written in a large, white, serif font on the right side of the image.

Bula.

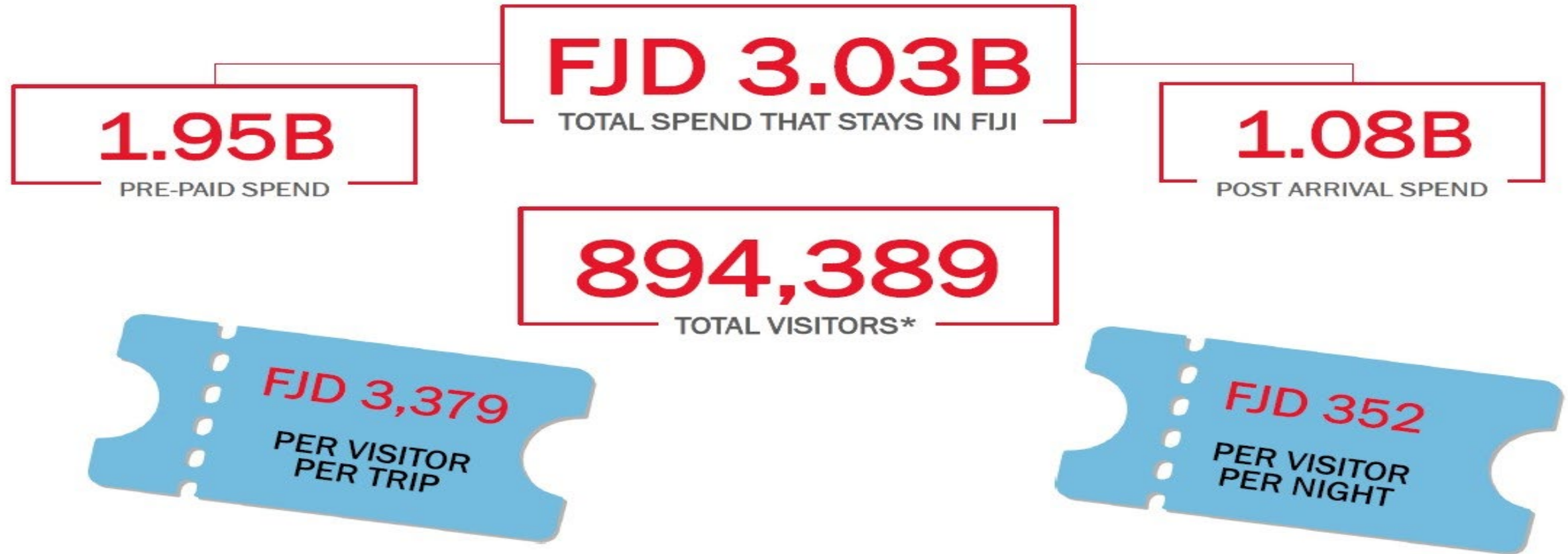


Fiji Hotel and Tourism Association

Where we were

SUMMARY OF KEY FINDINGS: VISITOR SPEND

2019 TOTAL VISITORS



Total visitor arrivals in 2019 increased +2.8% over the same period last year amounting to 894,389 visitors. The spending by visitors totalled to FJD 3.03 billion with two-thirds of purchases being made before arrival (\$1.95B) and one-third while in Fiji (\$1.08B). The average visitor spent FJD 352 per visitor per night or approximately FJD 3,378 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

Year	Visitor Arrivals^{[1]}	Comments
2018	870,309	Normal
2019	894,389	Normal
2020	146,905	Borders shut Mar 2020
2021	31,618	Borders shut 11 months^{[2]}
2022	636,312 (71% of 2019)	Borders Open 12 months
2023	252,245 (248,674 - 2019)	Jan-April – 4months^{[3]}

1. Visitor Arrival figures do not include transit passengers, cruise ship arrivals (12 hour stay) or returning residents
2. Borders reopened Dec 2021
3. April - 76,961 100.2% of April 2019

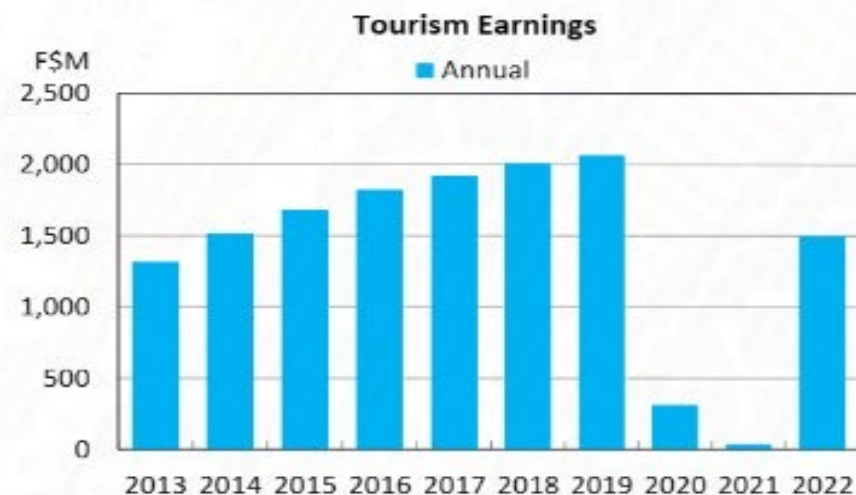
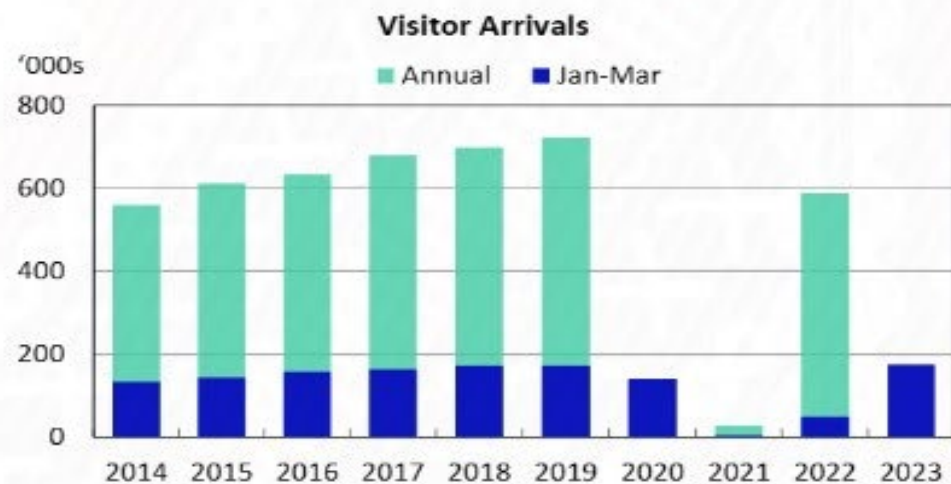
Last year : 2022

 636,312 VISITOR ARRIVALS	 82% HOLIDAY/ VACATION VISITORS	
\$271 AVERAGE DAILY SPEND 	9.7 NIGHTS : AVERAGE LENGTH OF STAY 	
421 LICENSED ACCOMMODATION PROVIDERS	\$418 AVERAGE ADR	71% OCCUPANCY RATES
38% ECONOMY CONTRIBUTION 	36.5% TOTAL EMPLOYMENT 	
13,000 ROOMS AVAILABLE		\$306 REVENUE PER AVAILABLE ROOM



Sectoral Performances

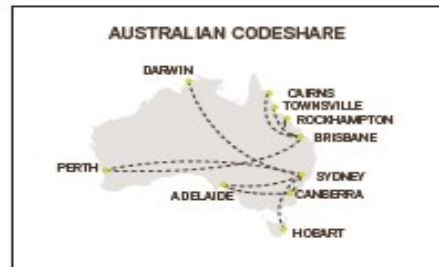
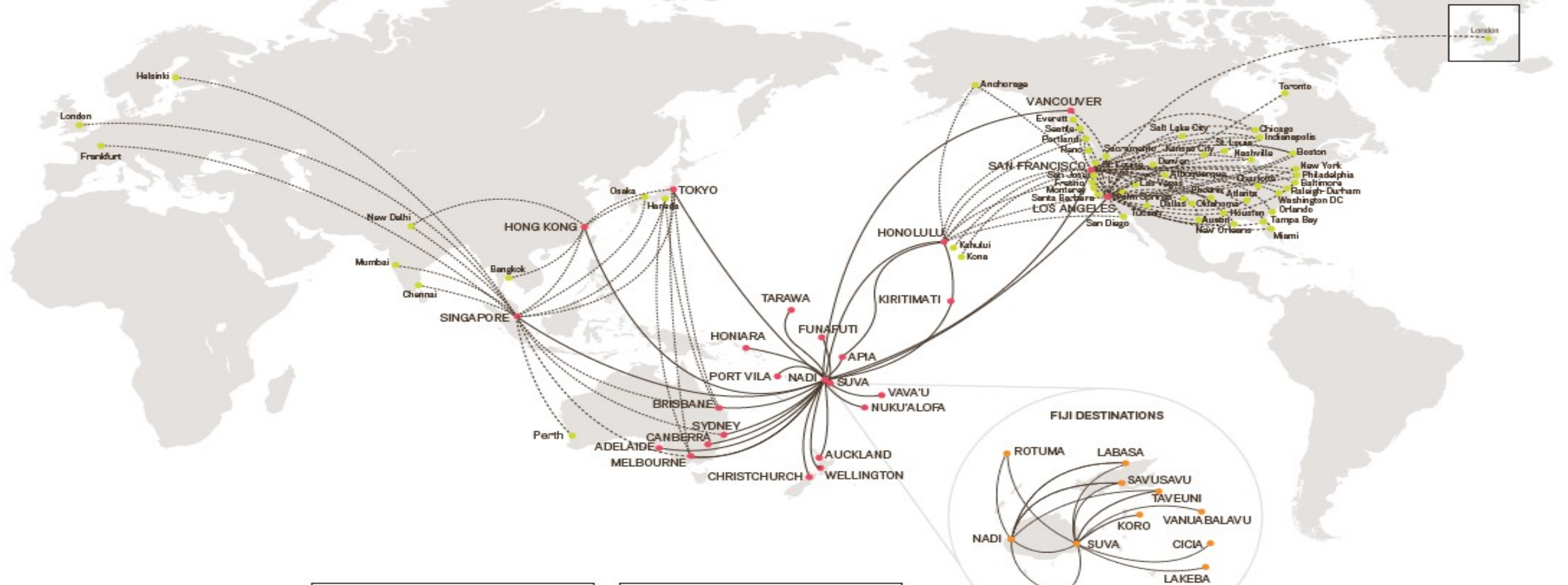
Tourism



Visitor Arrivals by Month Actual and Forecast



FIJI AIRWAYS DESTINATIONS



ROUTE KEY

- Fiji Airways Routes
- Codeshare Routes
- Fiji Link



Why invest in Fiji's Tourism Sector?

STRONG MARKET DEMAND:

- Fiji has bounced back strongly, with the total number of arrivals for 2022 reaching 636,312 - 102.5% of pre-pandemic numbers in December 2022.
- Pre-pandemic, Fiji saw a 23% growth in tourist expenditure in the country between 2015-19: pent-up tourism demand post-pandemic looks set to see that growth trend continue.

A WEALTH OF OPPORTUNITIES:

- Accommodation (including upscale resorts and boutique hotels, eco-lodges, MICE facilities, transit hotels); Supporting Infrastructure (inter-island transport); Adventure Tourism; Medical Tourism; Sports Tourism; Attractions and Tours.
- Numerous sites across the archipelago with high-yielding visitor numbers.
- A portfolio of identified owners and potential partners with investment projects ready to pitch.

A SOPHISTICATED TOURISM CLUSTER WITH STRONG CAPABILITIES:

- Major global tourism and hospitality brands have already made Fiji their home.
- A suite of national tourism accolades and award-winning tourism entities

EXTENSIVE GOVERNMENT PROVISIONS, INCENTIVES AND SUPPORT:

- Attractive fiscal incentives, including a 50% tax deduction allowance on CAPEX on site developments and a tax exemption structure ranging from 5-20 years, depending on the investment size.
- A government investment promotion agency - Investment Fiji - ready and willing to advise and support you every step of the way.



WHERE HAPPINESS
COMES NATURALLY





**WHERE HAPPINESS
COMES NATURALLY**



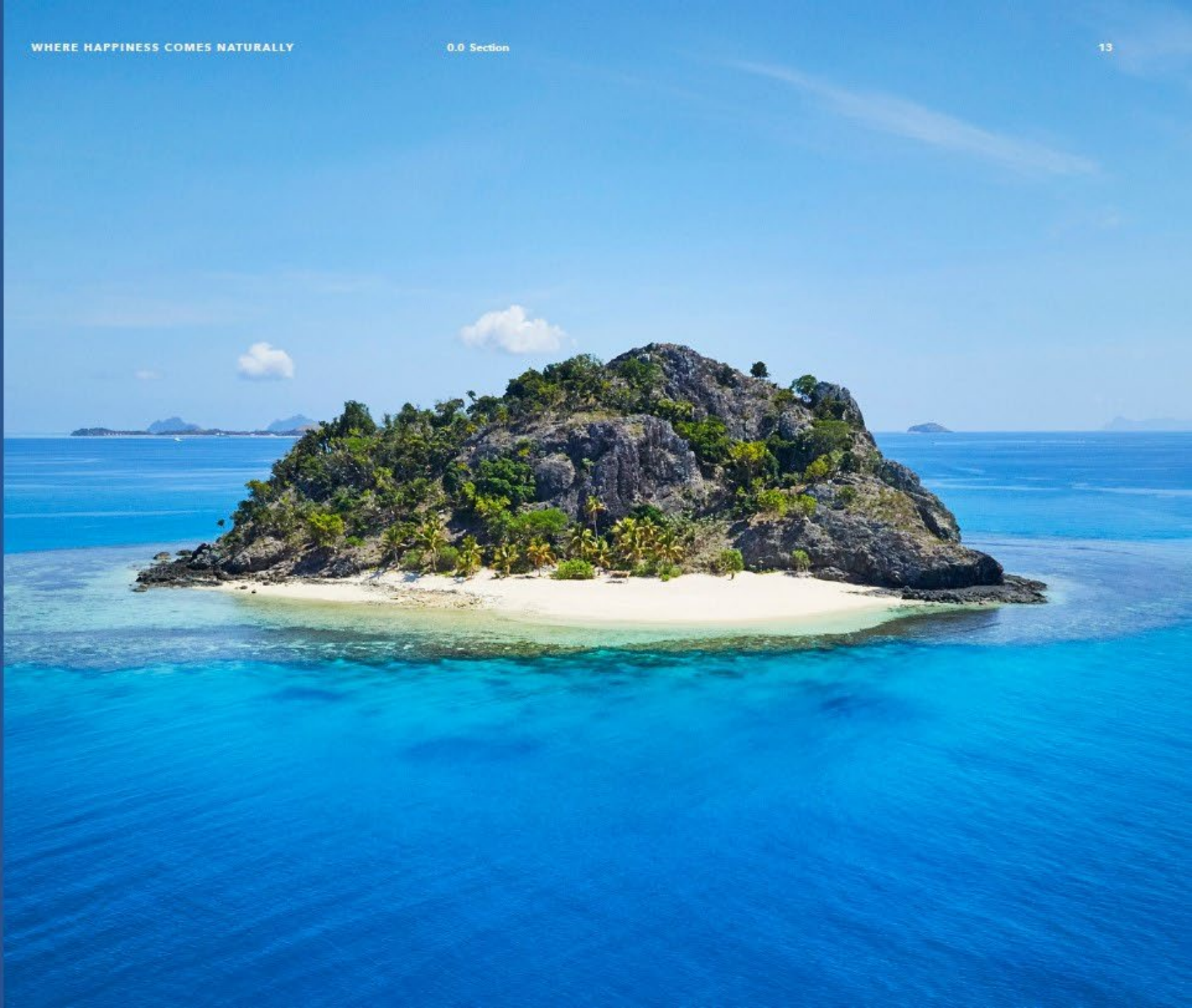
Overview

In Fiji, it's not what we say but how we say it that really sets us apart.

Every bula is delivered with gusto, and every vinaka delivered with warmth and sincerity.

As such, an authentic tone of voice is crucial for capturing the spirit of Fiji.

Our tone is a true expression of the passion we have for the people, place and culture of Fiji. Here's how we capture it.



Our brand platform

Happiness has always been a part of Fiji's identity. Not just over the course of our tourism history, but over the course of our history history. It's not a superficial emotion or a facade we put on for visitors. Rather, it stems from a cultural belief system, and we've been embraced by it, shaped by it, and raised on a fresh diet of it for three and a half millennia.

And because we are a culture that has, in many ways, mastered happiness, we're perfectly placed to create holiday experiences that bring genuine happiness to those who visit our island home.

It's this sentiment that we seek to capture in our brand platform and the comms that sit beneath it.

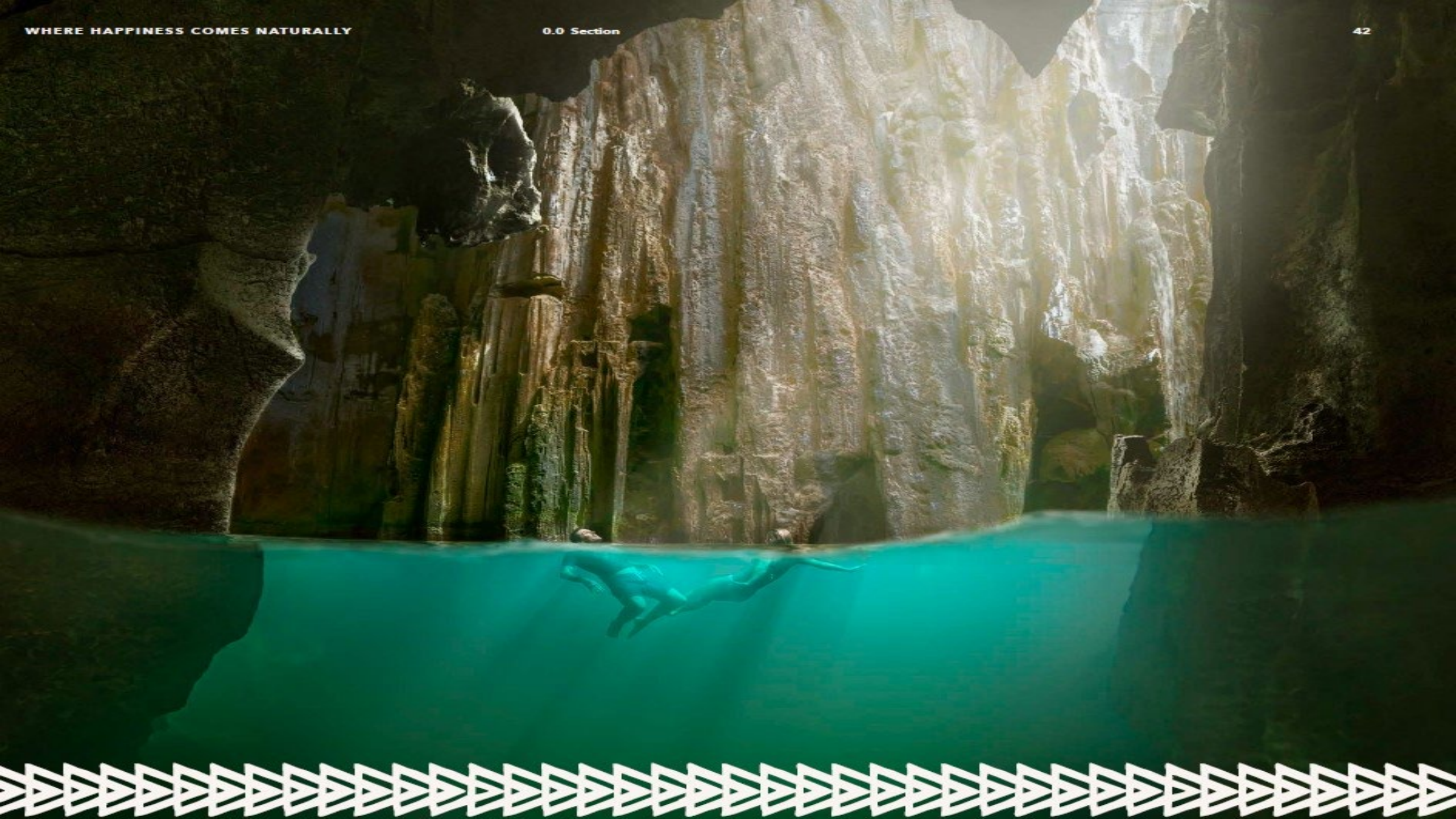


Where happiness comes naturally



F I J I

WHERE HAPPINESS
COMES NATURALLY



Bula,

Marau dina.

Ena gauna oqo e vaka me yaco tiko ena
gadrevi vakatotolo kei na kakana lekaleka.

Keitou vaqara ena podcasts kei na palasitika
Veisele kei na veirorovaki veikauyaki ni
dau kacivaki.

Ia mai Viti, e sega ni yawa na marau
se kaukauwa vakatotolo.

Eke ena noda parataisi,

Na marau sa makawa sara mai vei keda.

E bulia na noda itovo vakavanua ena ua katakata,
ka veiyaloyalo.

E vesuki keitou ena ivau qaqaco vinaka ni
matavuvale mai na

Na siga eda sucu kina.

Eda sa susugi cake ena dua na ka bulabula ka
bulabula kania tiko me tolu veimama na mileniumi.

Vei keda, Na marau e sa ka ga ni cegu.

Ia ni ko sa marau me vakataki keimami,

E rawarawa talega na wasei ni marau.

O koya gona, se o dua na nomu vanua
e kenadau, se dua na vulagi e rawata tiko
e dua na veivakilai vinaka ka veikidavaki kina,
e Viti, o na raica o ya

Ena yaco mai na bula marau.

WHERE HAPPINESS COMES NATURALLY

0.0 Section

HINDI FIJIAN



Our experience pillars

Adventurous experiences

Because we believe happiness is about wringing life out of every moment, we invite you to come and try out all our perfect adventurous moments, designed to make you feel truly alive.

Whether your adventure level is more sedately aimed towards sailing experiences, year round surf breaks, and epic golf courses; or if river rafting, ziplining, skydiving, and 4WD tours is more your speed, we've got an adventure to suit every excitement level.



Wanda