



2022-2024
CORPORATE PLAN

Tourism **fiji**

MESSAGE FROM THE MINISTER



“As we pave our way to economic recovery, we are presented with opportunities that ensure a more sustainable, resilient and inclusive Fijian tourism industry. We’ve set ourselves targets with robust strategies that will see to our rebound. That’s why this Corporate Plan is vital, as it acts as a roadmap for the tourism sector to collectively achieve our objectives and goals over the next two years.”

Hon. Faiyaz Siddiq Koya
Minister for Commerce, Trade,
Tourism and Transport

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MESSAGE FROM THE CHAIR



A handwritten signature in black ink, appearing to read 'A Viljoen'.

Andre Viljoen
Tourism Fiji Chair

“Tourism is the backbone of Fiji’s economy and at the very heart of who we are – we’re hospitable, proud of our cultural diversity and happy to host tourists from around the world and show them our beautiful islands. After the devastating effects of Covid-19 and associated shocks, it was a special moment as Fiji reopened our borders to the world from December 1, 2021. Looking forward, we now have momentum and optimism, opening markets once again and re-establishing Fiji into the minds of global tourists.

“This Corporate Plan is designed to provide clear direction for our industry and valued partners, containing the Strategic Priorities Tourism Fiji will focus on over the next few years. This plan and its execution is underpinned by the many hundreds of tourism businesses promoting the sector – promoting the beauty and depth of experiences right across Fiji – and is a roadmap to take us towards the overarching target of reaching visitor expenditure of FJ\$3 billion, by the end of the 2024 calendar year.”

MESSAGE FROM THE CEO

“Tourism Fiji is committed to the sustainable recovery of Fiji’s tourism industry, and together with our industry partners, we have started well on our journey. This Corporate Plan sets out our key Strategic Priorities, and the measures that will demonstrate our progress towards those goals. This plan has been put together after wide consultation with the tourism industry, government, stakeholders and team members, and sets out our targets for the next two years, to December 2024. I’m particularly proud of the resilience of the team and our industry, to come together to reopen Fiji. Now, we aim to build forward towards our goals, in a manner that will grow Fijian tourism sustainably – providing a future for hundreds of thousands of Fijians, and putting a smile on tourists’ faces as they enjoy a place where happiness comes naturally.”

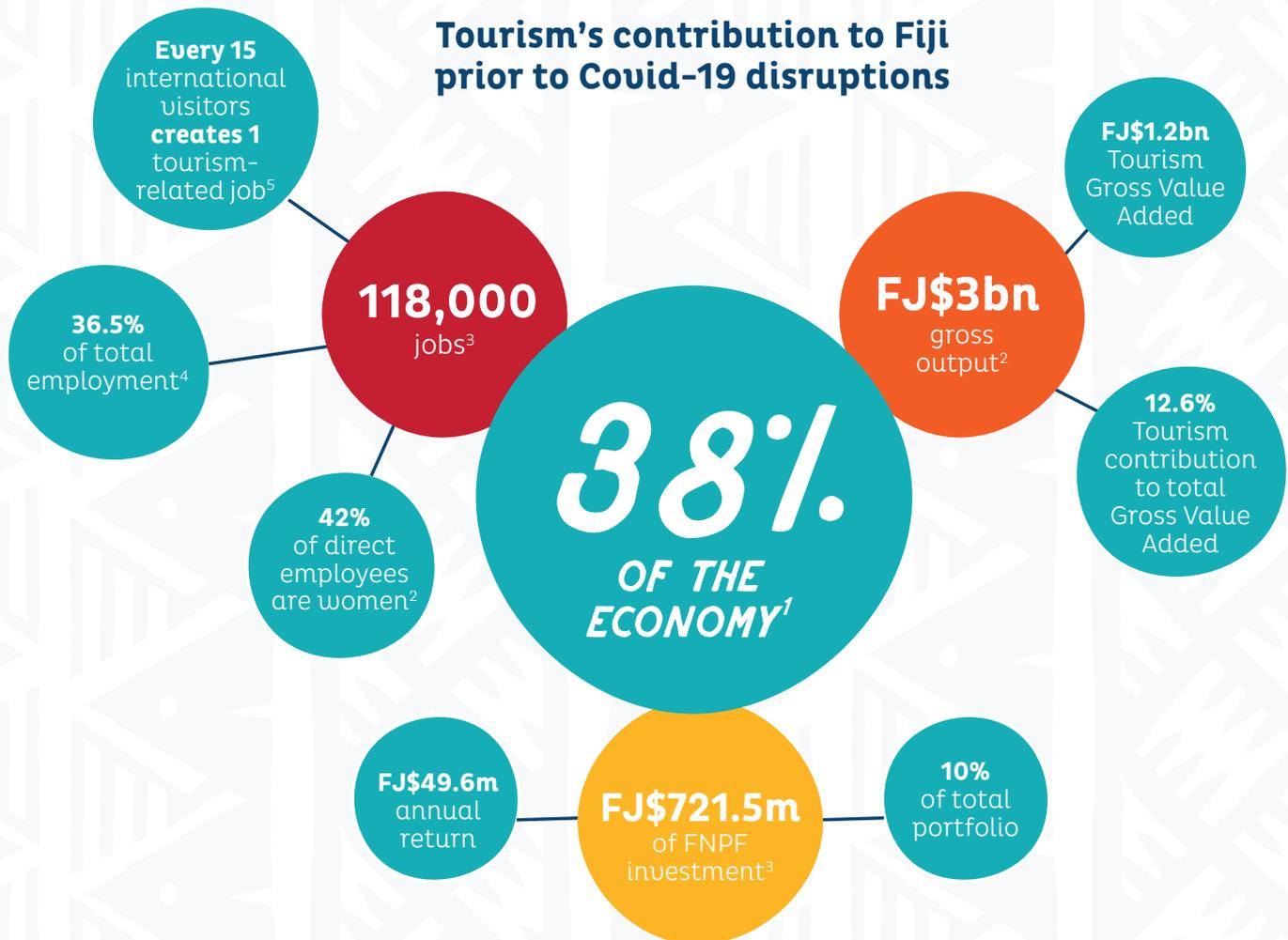


A handwritten signature in black ink, appearing to read 'B Hill'.

Brent Hill
Tourism Fiji CEO

IMPORTANCE OF THE VISITOR ECONOMY

Tourism's contribution to Fiji prior to Covid-19 disruptions



Tourism is a key driving force for Fiji's economy. The impact of the pandemic has highlighted the interconnectedness of tourism with other sectors, and the importance of not just international tourist spend in the economy, but also the spend of tourism workers and those employed in the provision of goods and services to the tourism sector. It has also highlighted the value and spend of domestic tourists.

¹International Finance Corporation/MCTTT. July 2020. 'Fiji COVID-19 Business Survey: Tourism Focus: Impacts, Responses, and Recommendations'.

²Fiji Bureau of Statistics. 2020. 'Fiji's Direct Tourism Contribution'. FBoS Release No: 109, 2020. Fiji Bureau of Statistics.

³Pacific Private Sector Development Initiative (PSDI). 2021. 'Fiji: Pacific Tourism Sector Snapshot'. Pacific Tourism Sector Assessment. Pacific Private Sector Development Initiative.

⁴Ministry of Industry, Trade, and Tourism. 2019. Fijian Tourism 2021. Suva.

⁵Estimated using international visitor arrivals in 2019, and direct and indirect employment for 2019 in Fiji Bureau of Statistics. 2022. 'Fiji's Direct Tourism Contribution 2020'. FBoS Release No 68 2022.



Tourism is central to the Fijian Government's 5-Year and 20-Year National Development Plan, and contributes as a cross-cutting sector to the achievement of the Sustainable Development Goals. Tourism is specifically referenced in these plans in the targets of Sustainable Development Goals 8, 12 and 14: inclusive and sustainable economic development, sustainable consumption and production, and sustainable use of oceans and marine resources.

Within Fiji, the tourism industry is often considered a leader in inclusion, innovation, and quality standards. The pandemic also revealed the less visible benefits of tourism, such as the industry's role as an incubator and developer of talent and entrepreneurship, and as a crucial income generator for Fiji's creative and cultural industries.

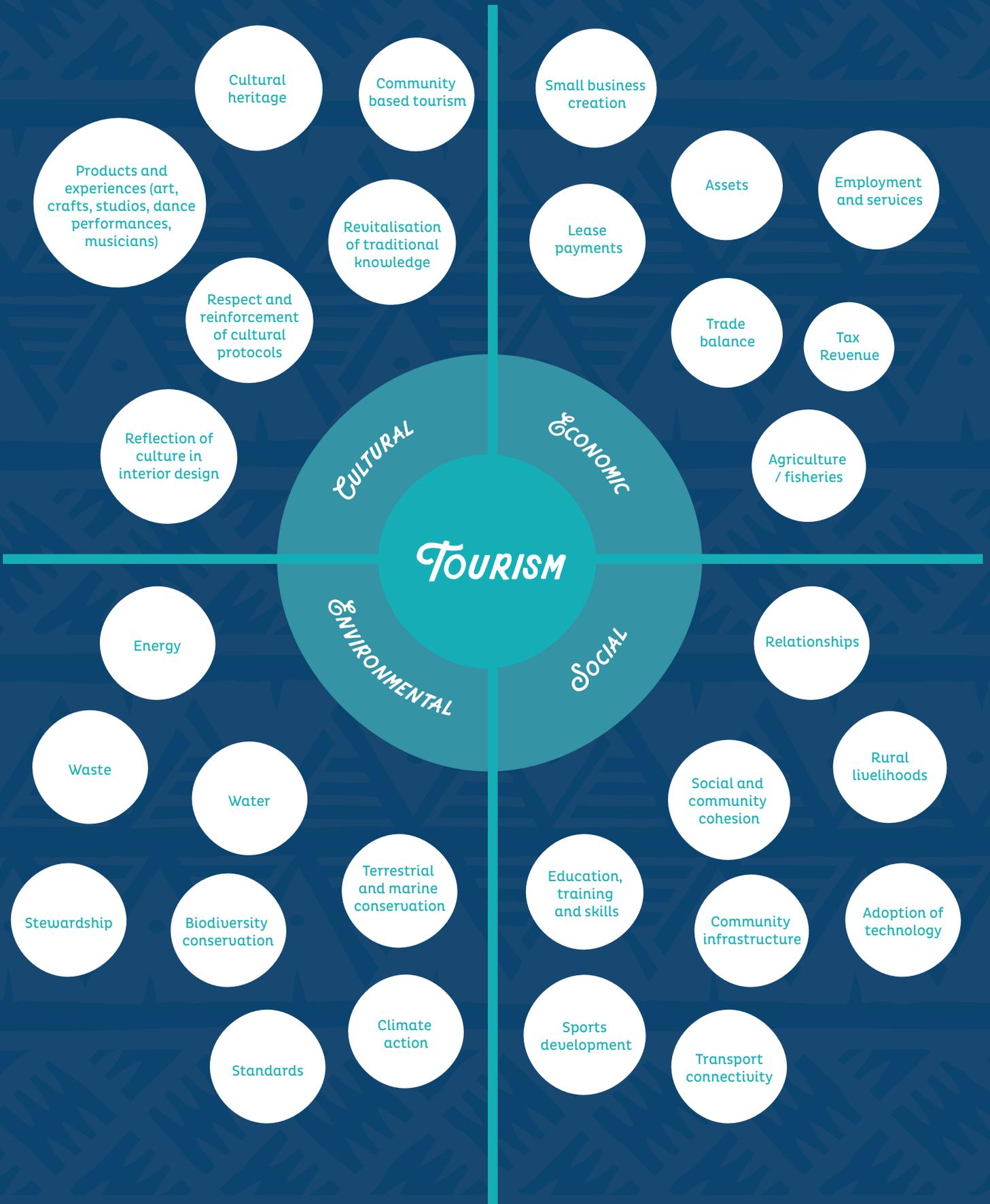
Tourism, and the love tourists have for Fiji, is a source of pride for many.

While it is in the nature of tourism to project positivity, challenges should not be overlooked, particularly with the pandemic demonstrating the dependence of so many livelihoods on the industry.

Our role, as Tourism Fiji, is to promote the Fijian 'brand', and to make people around the world and at home want to experience the place where happiness finds you. To sustain that brand, and with the visitor economy so important to the nation's well-being, we must work with international and domestic visitors, Government, industry, and other partners to achieve our shared goals.

This Corporate Plan sets out Tourism Fiji's part in supporting an inclusive economic recovery where Fijians across the country enjoy the benefits of a uniquely Fijian industry that creates meaningful jobs and value chains, promotes environmental stewardship, connects visitors to our rich culture, and delivers value to the custodians of the land and to all Fijians.

TOURISM'S SPHERE OF INFLUENCE





VISION

Inspire the world to come and experience Fiji - where happiness finds you

PURPOSE

Ensure that Fiji is promoted and marketed as a tourist destination for the purpose of maximising sustainable and long-term benefits to Fiji*

*Tourism Fiji Act 2004, s 4 am Promulgation 5 of 2009 s 6, effective 6 February 2009

WHERE WE WERE

IN 2019

The international visitor economy was estimated at over

FJ\$3 billion



with **2/3**

of that spending pre-arrival, and one third in Fiji.

We had **421** licensed accommodation providers, with a combined inventory of over **12,000** rooms.⁶

421 
licensed accommodation



12,000
rooms⁶

The average visitor spent **FJ\$353 per night** and **FJ\$3,379 per trip** with an average length of stay of **9.6 nights**.⁷



International visitor arrivals grew

2.8%

compared to 2018, totalling the highest number Fiji has experienced:

849,389⁸

December 2019 ushered in the Covid-19 pandemic – prompting Fiji to close its international borders in March 2020. Domestic tourism became a vital source of income for some operators during this period, and it was not until December 2021 that international tourists returned.

⁶Hotel Licensing Board. 2021. List of Licensed Hotels in Fiji

⁷Ministry of Commerce, Trade, Tourism and Transport and International Finance Corporation (IFC). 2020. 'Annual 2019 International Visitor Survey'.

⁸Fiji Bureau of Statistics. 2022. 'Provisional Visitor Arrivals - February 2022'. Statistical News Release FBoS Release No.47, 2022.

WHERE WE WANT TO BE

IN 2024

Tourism Fiji's primary goal is to drive a return to 2019 levels by the end of 2024 and to restore the jobs and livelihoods that tourism supports. Achieving this depends on a number of factors, including:



International travel continuing to 'normalise', with no major setbacks;



Key markets reopening;



Airline capacity returning;



Sufficient accommodation inventory opening;



Future climate-related extreme events having limited impact;



Economic recovery and stability enabling sufficient investment in marketing Fiji.

Taking into consideration international tourism projections,⁹ the capacity of Fiji's tourism industry, the new inventory and renovations in the pipeline, and broader sustainability considerations,



we ambitiously believe that by the end of 2024, Tourism Fiji can support an expansion of the visitor economy to an estimated

FJ\$3.37 billion¹⁰

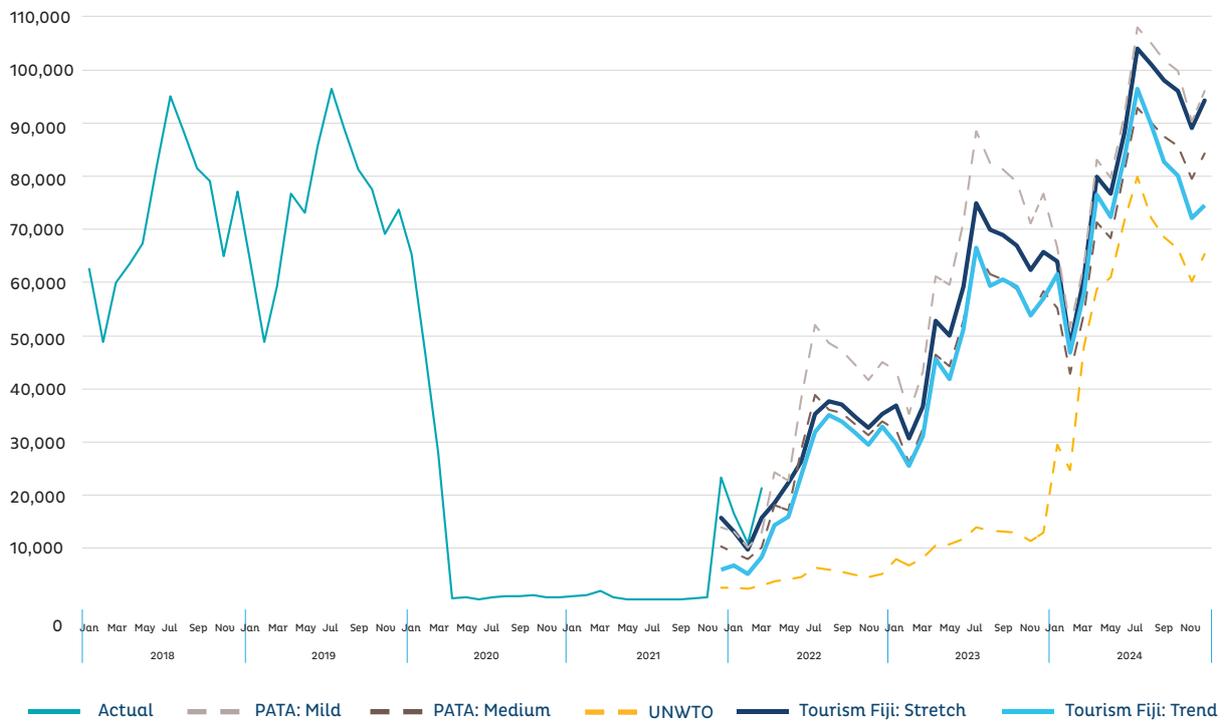
and attract **1 million** international visitors.

The Strategic Priorities outlined in this plan provide a roadmap that will support this ambitious, yet achievable goal. Alongside the priorities, we have identified measures by which we will monitor our progress.

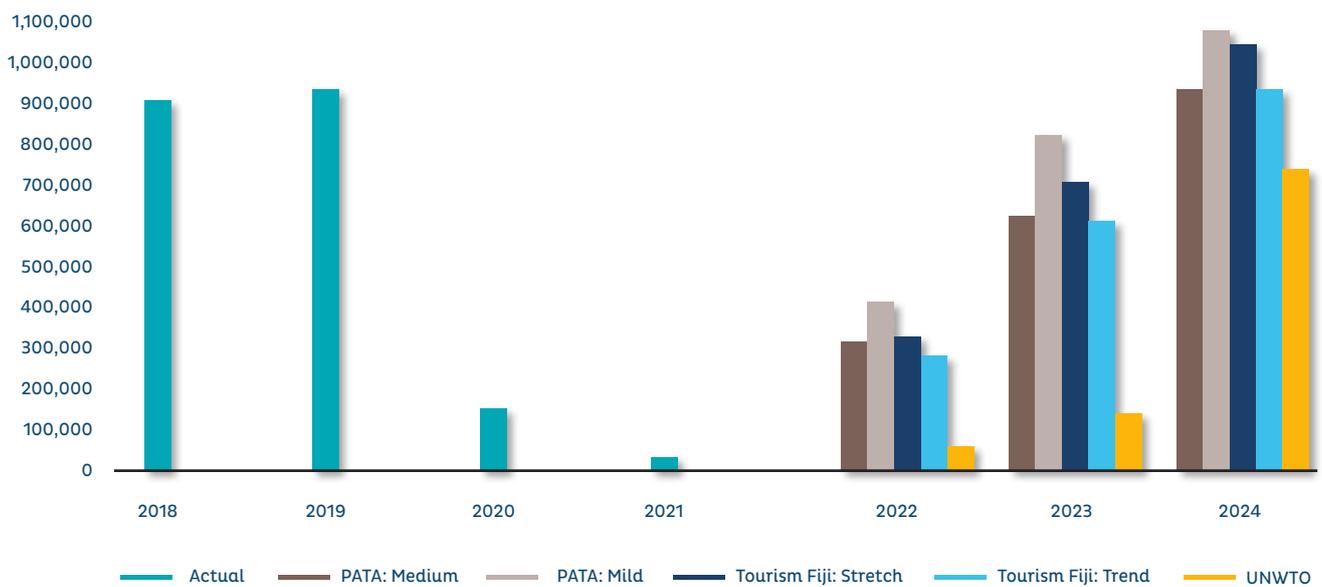
⁹Including forecasting by the Pacific Asia Travel Association and the UN World Tourism Organisation.

¹⁰This estimate extrapolates from an average spend per visitor per trip of FJ\$3,379 in 2019 (MITT & IFC, 2020).

Visitor arrivals by month, actual and forecast



Visitor arrivals by calendar year, actual and forecast



Tourism and employment

Pre-pandemic,
tourism employed:

over
118,000¹¹

2020

80%
of workers in Fiji's
tourism sector
had become
unemployed¹²

2021

estimated
115,000
people in Fiji
unemployed or on
reduced hours¹³

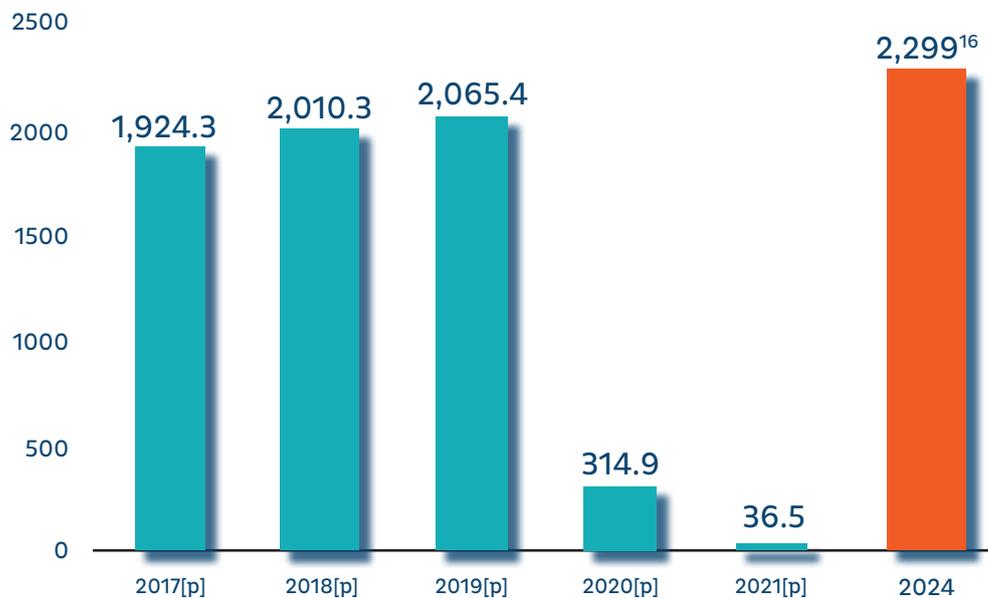
Tourism by 2024
is employing:

over
118,000

2021

More than
250,000
people accessed
support during
the pandemic¹⁴

Earnings from tourism, excluding airfares (FJ\$, million)¹⁵



¹¹Pacific Private Sector Development Initiative (PSDI), 2021. 'Fiji: Pacific Tourism Sector Snapshot'. Pacific Tourism Sector Assessment. Pacific Private Sector Development Initiative.

¹²Fiji Hotels and Tourism Association (October 2020) Tourism Talanoa: Our Care Fiji Commitment, Suva

¹³Fiji Government. 9 July 2020. Hon. PM Bainimarama's statement at the Global Leaders' Day at the ILO Global Summit on Covid-19 and the World of Work. <https://www.fiji.gov.fj/Media-Centre/Speeches/English/HON-PM-BAINIMARAMA%E2%80%99S-STATEMENT-AT-THE-GLOBAL-LEADE>

¹⁴Republic of Fiji. 16 July 2021. Economic and Fiscal Update Supplement to the 2021-2022 Budget Address.

¹⁵Fiji Bureau of Statistics. March 2022. Fiji's Earnings from Tourism. FBoS Release No: 42, 2022

¹⁶Tourism Earnings forecast excludes airfares, and is calculated using the International Visitor Survey, 2019 and forecast visitor arrivals.

OUR SIX KEY PRIORITIES

In determining our focus and resources, Tourism Fiji has consulted widely with key Government agencies, industry associations, development partners, industry stakeholders, and internally.

As a result, the following Strategic Priorities have been identified which will provide the focus for Tourism Fiji from 2022 to 2024.

1

SUSTAINABLY GROWING DEMAND

Through global marketing, growing the value of the visitor economy to support a sustainable recovery to pre-pandemic levels and beyond.

2

SUPPORTING EXPERIENCE DEVELOPMENT

Supporting existing, new and diversified products to provide high quality, meaningful experiences, marketed across Fiji and ensuring experiences and products grow in line with expected demand.

3

FOCUSING ON SUSTAINABILITY

Looking to the future not only to conserve and care for the ecosystems we treasure, but also to strengthen social, cultural and economic impacts.

4

SHAPING PERCEPTIONS OF FIJI

Promoting our unique identity, blend of cultures, food, and way of life.

5

PROMOTING THE VALUE OF TOURISM TO FIJI

Communicating tourism's interconnectedness and contribution to the economy and society.

6

ENABLING AN EFFICIENT, HIGH-PERFORMING AND INNOVATIVE TEAM

Developing and strengthening the tools, processes and procedures that support our Tourism Fiji team to drive organisational excellence.

What does this mean?

1 Sustainably Growing Demand

By the end of 2024, our target is to return our industry to pre-Covid levels in terms of contribution to the economy (approximately 38% of GDP¹⁷), visitor spend (estimated at over FJ\$3 billion¹⁸) and employment (over 118,000 direct and indirect jobs¹⁹). While our focus is the value of tourism to Fiji and Fijians, monthly arrival statistics provide a base-line, measurable proxy for progress to delivering this value. We therefore aim to return to the 2019 peak of international arrivals within three years.

The opening of our borders to international visitors in December 2021 was the first step on a long road to recovery. Initial arrival numbers were strong, reflecting expected pent-up demand and recognition of Fiji as a Covid-safe destination through the Care Fiji Commitment - a major achievement led by Tourism Fiji. Although the Omicron variant of Covid-19, combined with severe weather events, slowed this trend, forward bookings are strong for 2022, with the message that Fiji is “open for happiness” being received, more properties reopening, and international travel restrictions continuing to ease.

We will maintain efforts to diversify our customer base and attract and expand high value customer segments. Acknowledging that growth must be deeply connected to sustainability, we are optimistic that returning to pre-Covid levels is achievable, whilst maintaining a strong focus on conserving the special environment that attracts our visitors.

Through world class digital marketing we will continue to focus on reopening to our traditional markets - Australia, New Zealand, the USA and the South Pacific - and then target growth in selected key markets, including China, Continental Europe, Japan, Singapore, and India. At the same time, we will assess opportunities to push into markets such as Korea and Canada to expand our horizons and attract tourists from across the globe. Air connectivity and the development of a sustainable cruise strategy are critical in achieving this Strategic Priority.

¹⁷International Finance Corporation/MCTTT. July 2020. 'Fiji COVID-19 Business Survey: Tourism Focus: Impacts, Responses, and Recommendations'

¹⁸Fiji Bureau of Statistics. 2020. 'Fiji's Direct Tourism Contribution'. FBoS Release No: 109, 2020. Fiji Bureau of Statistics.

¹⁹Pacific Private Sector Development Initiative (PSDI). 2021. 'Fiji: Pacific Tourism Sector Snapshot'. Pacific Tourism Sector Assessment. Pacific Private Sector Development Initiative

World class digital marketing means developing digital marketing capabilities and improving Tourism Fiji's marketing technology to ensure efficiency of spend. We will work with the best specialist agencies to develop a roadmap and increase digital capabilities to allow for increased personalisation and enhanced digital experiences for potential visitors.

Business events will continue to be a focus for Fiji, and for Tourism Fiji. We will use the natural assets of Fiji as the hook, coupled with our inventory and facilities, particularly in the west of Viti Levu, to ensure a steady flow of meetings, events, conferences and exhibitions.

It is imperative to our goals to drive dispersal across Fiji. This means a greater dispersal of visitors to destinations beyond Denarau, the Coral Coast and the Mamanuca islands, to parts of Fiji that traditionally host relatively low numbers of international tourists, such as Vanua Levu, the Yasawas, Taveuni, Ovalau, Kadavu, Pacific Harbour and Beqa, and the Suncoast. Importantly, to achieve this dispersal, Tourism Fiji is committed to working with key stakeholders to improve infrastructure and investment opportunities to sustainably open up these areas.

Promoting Fiji as a varied destination with unique experiences to be found across our 330 islands will support increased lengths of stay, wider dispersal of economic benefit and the attraction of new travellers. Our uniqueness is found in the Fijian culture, endemic species and diversity of wildlife, accessibility of boutique islands, locally grown produce, and in the Fijian way of life - the bula spirit - so evident across the tourism and hospitality sector.

Tactically, campaigns will be developed to target the considerable number of travellers who transit through Fiji to encourage them to stay for a few days and grow this market.

The success of our campaigns will be measured through key digital metrics including site visits, continual growth in users and page views to ensure that [fiji.travel](https://www.fiji.travel) is the primary source of information for tourists coming to Fiji.



2 Supporting Experience Development

We recognise that achieving a target of FJ\$3 billion in the visitor economy by the end of 2024 will begin to stretch our accommodation inventory, and the depth of our tourism experiences, at their current levels. This Strategic Priority will ensure that Tourism Fiji works with industry to facilitate more experiences and tourism ventures that can be marketed globally, ensuring growth in visitor spend and dispersal. Tourism Fiji will provide tourism expertise to key Government partners, such as Investment Fiji, offering complementary inputs to support sustainable growth. As part of this Strategic Priority, Tourism Fiji aims to facilitate a growth in the number of tourism businesses, addressing key gaps in the visitor experience, across Fiji.

Fiji's diverse culture, healthy reefs, varied landscapes, and unique biodiversity provide an incredible foundation for a diversity of amazing experiences: from world class diving, food and farm experiences to nature-based encounters, adventure excursions and cultural interactions. These experiences can be tailored to, but often cut across, segments, whether family, value, luxury, adventure, or solo women travellers.

Across Fiji, many experiences can be relatively inaccessible to visitors. In partnership with the industry, we will identify and promote the existing depth of experiences available, and use our connections to the tourism trade, our website and other digital tools to connect visitors to them.

We will support the further development of existing products and the creation of new products across locations to ensure there are high quality, meaningful experiences available to visitors. In doing so, we commit to recognising and promoting women-led tourism businesses to support their growth as visitors return. We will promote certified Fijian Made products and quality proponents of traditional and contemporary arts and culture, and support opportunities to market directly to visitors.

We will support Government partners to assist small and medium businesses to get products market-ready, and connect them to the global tourism trade. We also recognise that for communities and individual entrepreneurs seeking to engage in tourism, and particularly for women, there are limited opportunities to understand the changing expectations and interests of visitors. Tourism Fiji will strengthen its role in building

awareness and distributing market intelligence on traveller trends to new and emerging operators, including women-led businesses.

To ensure we are an effective partner, we will enhance the Industry Engagement facility within Tourism Fiji, as well as develop our Destination Development role. We will also continue to work consultatively with relevant authorities, domestic airlines and maritime transport to support long term, reliable inter-island connections. Our aim is to help tourism and tourism experiences continue to grow and enable the dispersal of tourists sustainably and respectfully across our many islands.

Tourism Fiji recognises the work undertaken by Investment Fiji and the various destination marketing organisations, and will continue to help provide information and expertise to attract the right development and experiences to sustainably grow the industry. In particular, we will support research and market analysis to reveal opportunities for growth, and current gaps in sectors such as accommodation, expedition cruises, adventure travel, education and more.

To drive quality within the industry for both experience providers and in our hotel supply, we will closely monitor visitor satisfaction, and work with relevant Ministries and agencies to develop minimum standards and appropriate quality classifications.





3 Focusing on Sustainability

As tourism and the broader Fijian economy recover from the pandemic, the opportunity exists for positive, sustainable and inclusive growth.

A core motivation for Tourism Fiji is the way tourism contributes to Fiji's development. In showcasing the best of Fiji to the world, we want to ensure that we are supporting the country to become better for all Fijians. Sustainability is key to this. Without a bold approach across the four pillars of economic, social, environmental and cultural sustainability, throughout the industry and beyond, we endanger the future contributions tourism can make.

Of particular importance to Tourism Fiji is the role of tourists in sustainable activities. Central to this Strategic Priority is raising visitor awareness of the sustainability measures being undertaken in Fiji and, most importantly, highlighting the role visitors can play in contributing to tourism's sustainability. Visitors play this role when choosing where to stay, the activities they participate in, the way they interact and behave, and how they spend their money.

Tourism Fiji will ensure that sustainability is central to our activities. Working with the Ministry for Commerce, Trade, Tourism and Transport, we will pursue certification as a sustainable destination through the Global Sustainable Tourism Council. Sustainability will be core to the development of minimum standards within the industry and we will support the Ministry to develop its forthcoming national sustainable tourism framework, drawing inspiration from the Pacific Sustainable Tourism Policy Framework and global best practice. We will launch a campaign through which visitors will pledge to respect our environment and culture, and we will undertake a mapping of projects, activities, and standards within our industry so we can confidently promote Fijian tourism's sustainability and regenerative efforts.

As an organisation, we recognise that we can do more to set an example. We will calculate and publish our carbon footprint, as well as establish internal standards for purchasing and procurement. We will work towards developing our own internal programs and ensuring our events are free



of single-use plastics, minimise waste, and utilise and promote the best of Fiji produce and talent. To support this work, seek to appoint a full-time sustainability officer, audit and highlight sustainability measures, including in agritourism, and ensure our team undertakes training to better understand sustainable tourism and our role within it. Tourism Fiji commits to taking a facilitation role to assist the industry with tools and trade introductions to further the use of local produce, products and talent, with a particular focus on women.

While we create and identify metrics through these activities, we will measure attitudes to sustainability through specific questions in the International Visitors Survey.



4

Shaping Perceptions of Fiji

Fiji enjoys a strong, positive, aspirational reputation globally. Over 60% of respondents in Australia, New Zealand and the US rated their impression of Fiji as Excellent or Very Good. Familiarity with Fiji as a destination varied, with over 35% of Australian and New Zealand respondents having a high level of familiarity with Fiji, and only 24% of respondents in the US feeling familiar with what Fiji has to offer.²⁰ We are also conscious of some less favourable perceptions relating to access and cost that reflect Fiji's relatively remote location in the Pacific Ocean, alongside a perceived limited depth of available experiences.

The survey results show that there is ongoing work to do in creating greater awareness of Fiji in all markets, with a bigger task ahead to build awareness in the US. This Strategic Priority focuses on strengthening our research into traveller assumptions and perceptions, and addressing them through effective marketing and public relations. By doing so, we will grow demand across markets, differentiate from our competitors, and highlight the true value, depth and accessibility offered by Fiji. Tourism Fiji recognises the value of public relations, social media and content to educate potential visitors and shape and reshape their perceptions, as well as to grow areas of strategic importance such as food and drink, luxury, adventure and wellness.

Fiji has a complex, unique identity and blend of cultures. We have amazing fresh produce, and world-class traditional and fusion dishes; we have vibrant tropical forests, and spectacular reefs; we have deep-rooted traditions and a special way of life. We want to ensure that we have a brand that represents the true Fiji, and that everyone who visits is attracted by the depth of experiences and leaves with a true impression of Fiji in their heart that they will share with others.

As more competing destinations reopen as the pandemic eases, we will emphasise Fiji's uniqueness, and how the experiences we offer as a destination can be experienced "only in Fiji". This includes a consistent representation of Fiji's culture, diverse marine life, island resorts and

²⁰ Survey conducted between January and March 2022 by Twenty31 Consulting on behalf of MDF Fiji and the Tourism Statistics Team

beach clubs, local produce, handicrafts and fashion, and 'bula spirit'. Our people and our storytelling culture are central to visitors' ability to form a deep and long lasting relationship and understanding with who we are as a people and place.

To diversify and build Fiji's appeal in our core markets, we will highlight the breadth of exotic, luxurious and adventurous experiences across Fiji, and tell the story of food and drink across Fiji - focusing on quality, variety, and special local highlights. For our long-haul markets, our focus will be less nuanced, and will highlight direct flights, accommodation options, and the location of Fiji, with growing awareness being key.

Prioritising the development of experiences and supply, and driving minimum standards, are important components of ensuring Fiji's brand continues to have substance. There is increasing recognition of Fijian cuisine, spurred by its creativity and use of quality local ingredients. Fijian designers, artists, dancers and craft producers are increasingly formalising and creating world-class products and performances. Over the next two years, we will challenge ourselves to convey this evolution in the food and creative scene, alongside other constantly evolving sectors, such as luxury, wellness, discovery or adventure.



Women in leadership. Credit: Tourism Fiji.



Accurately representing and conveying culture, such that all Fijians are proud of how we portray the nation, requires collaboration and support from partners. We will continue to work with the Ministry of iTaukei Affairs and others to ensure that Fiji's diverse culture is appropriately and respectfully portrayed. We will identify authoritative cultural advisors and engage them for specific campaigns and events.

Attracting major events to Fiji fits into this Strategic Priority by using mass reach or participation to grow the awareness of Fiji and elevate some of our key assets such as surf and rugby. We will also use our destination as a hook to bring in more events that will result in increased bookings and spend.

Tourism Fiji will engage the right agency partners to meet this Strategic Priority. We will lean into world-class brand and advertising agencies to help us evolve Fiji's brand. We will bring them onboard in a truly immersive way, allowing them to develop a deep understanding of Fiji and the opportunities to consult locally, to ensure that the brand evolves in a way that makes Fijians proud.

Fiji is thought of differently by different markets, depending on their proximity and awareness of our destination. Ultimately, our ambition is to make Fiji the destination of choice in the southern hemisphere, measured by continued and regular research, media monitoring and social listening, and trade feedback.



Kava Ceremony. Credit: Tourism Fiji.

5

Promoting the Value of Tourism to Fiji

This Strategic Priority ensures Tourism Fiji consistently promotes the value of tourism, and the opportunities for sustainable and inclusive growth that it presents. The pandemic has starkly demonstrated the importance of tourism to Fiji's economy. The connections between the tourism sector and the wider Fijian economy and society run deep, and Tourism Fiji has a role in communicating the value of tourism.

The value of our industry is not only economic, but also social, cultural and environmental. It is not just the jobs that tourism generates, but the investment opportunities, its role as a conduit for art, culture, food and the creative industries, and the overall improvement tourism, tourism experiences, events and attractions can bring to livelihoods, wellbeing and lifestyle.

Tourism provides safe, well-paid employment and careers for thousands of people; it is a major purchaser of our agricultural produce; it promotes and protects cultural practices, supporting the transfer of knowledge and skills to future generations; and it largely acts to protect and conserve a pristine environment. Tourism operators are often leaders in these areas, demonstrating best practice and adopting international standards. Understanding and awareness of this is important for the sustainability of the industry, for effective policy-making, and for national fiscal policy decisions.

We are proud that the tourism industry in Fiji is a leader in the employment of women, with women comprising 42% of all direct tourism employees.²¹ We recognise that only a quarter of managerial and professional positions in the tourism sector are held by women.²² We will add our voice and influence to promote more inclusive employment policies, and to ensure women are better represented at management and board levels. We also recognise that many women who earn a livelihood through tourism, such as craft sellers and those providing childcare, are part of the informal economy. It is important that we work with partners to build our

²¹Bureau of Statistics. 2020. 'Fiji's Direct Tourism Contribution'. FBoS Release No: 109, 2020. Fiji Bureau of Statistics.

²²AfDB Fiji Country Gender Assessment 2015, pg. 15 in COVID-19 Response Gender Working group. 2020. Gendered Impacts of COVID-19 on Women in Fiji.

understanding of the role that women, particularly those in the informal economy, play in the Fijian tourism industry; use this evidence to inform strategic planning and advocacy; and identify opportunities to address the challenges they face.

Domestic tourism also plays an important role in the broader visitor economy, as evidenced during the pandemic. Together with the business events segment, this Strategic Priority seeks to highlight and grow these less obvious areas of tourism and the opportunities they present for Fiji.

In order to support the industry, our digital marketing will be optimised to generate commission-free leads to tourism accommodation, experiences, restaurants and events. This is a direct contribution by Tourism Fiji to the industry, supporting tourism growth. This will be measured by leads generated to operators, with a goal to provide, via data sharing, conversion opportunities leading directly to sales.

During the pandemic we have strengthened relationships with government and industry, working together more closely than ever. We will continue these collaborations and open channels of communication, to ensure there are spaces for frank, honest, and informative exchanges. In the next two years, aligned to our activities relating to sustainability, we will also conduct a survey to understand how Fijians perceive and value tourists and tourism. In this way we can ensure we are all pulling in the same direction, creating opportunities, and shaping the industry to work for every Fijian who wants to connect to tourism.



Indian Temple. Credit: Tourism Fiji.



6

Enabling an Efficient, High-Performing and Innovative Team

Tourism Fiji exists to develop the tourism industry for Fiji. Importantly, we also provide world class employment opportunities at an outward-thinking, high-performing, innovative and contemporary organisation. Therefore, providing opportunities for Fijian graduates and experienced tourism industry operatives remains a key priority.

Opportunities will be provided for professional development to support our team to keep pace with new tools and an ever-changing market, and to develop leaders from within. At the same time, it is important for us to recruit both nationally and internationally to bring in critical skills and expertise, ensure Tourism Fiji is delivering a return on the public funds we receive, and ensure we are truly world class. We must benchmark ourselves against those destinations we seek to emulate or surpass, as well as similar tourism agencies across the world.

In order to build for the future, we will undertake a training needs assessment across the organisation, institute a formal and updated induction programme for new staff, formalise our internship program and partnerships with Fijian universities, and identify opportunities for secondments and mentoring. Through consistent performance management and learning and development, we will seek to retain the very best team members, and support their development to produce outcomes that meet our Strategic Priorities.

We will be digital first. We will seek efficiency. We will follow defined protocols and procurement processes. We will continue to improve, streamline and document our internal processes and systems, and seek to devolve greater budgetary control to directors and managers, in line with improving performance management systems and more nuanced indicators. The pandemic has shown how technology can be harnessed

to improve ways of working and the sharing of information, bringing global teams together. We will review the tools we use as an organisation, and provide training to maximise the use of existing tools. Improving our efficiency is our duty to taxpayers, but also essential to free up our team to perform their core roles.

Tourism Fiji is committed to a diverse, flexible workplace, supporting equality and opportunities for all. We will maintain a commitment to gender equality in our workforce and work towards gender parity in our senior executive and board roles. We will ensure our human resources policy supports a modern and fair workplace, and we will undertake an annual staff survey to assess the pulse of the team.



The Tourism Fiji team. Credit: Tourism Fiji.

MEASURING SUCCESS

To ensure that our Strategic Priorities are met, the Tourism Fiji team have agreed on measures that will gauge how we put these priorities into action. The Tourism Fiji board will regularly review our progress and these measures will be shared on the Tourism Fiji corporate website as an indicator of our work towards the goals and priorities identified.

We have identified a comprehensive set of metrics to ensure that, as we market Fiji to the world, we are tracking our impact. At the same time, we will continue to strengthen our market intelligence and provide updated forecasting across a range of indicators to dynamically develop our campaigns and support decision-making by industry and policy-makers. As our work evolves through the period of this plan, we will better utilise existing data sources, as well as identify and add new metrics as they become available.

To achieve this we will continue to work closely with partners, including through the tourism statistics taskforce, to improve forecasting and build reliable and robust tourism statistics. We will actively monitor all official statistics releases related to tourism, and use multiple sources wherever possible to validate operational data, alongside appropriate qualitative information and research.



Key Metrics Aligned to the Six Strategic Priorities

	Metric	Source	2019	2020	2021	2022	2023	2024
1. Value to the economy								
1.1	Tourism Gross Output (FJ\$)	Fiji's Direct Tourism Contribution, FBOS	\$3.053bn	\$0.736bn	-	-	-	Exceeding \$3.053bn
1.2	Average visitor spend (FJ\$)	International Visitor Survey, MCTTT	\$3,379	-	-	-	tbd	tbd
1.3	Total visitor spend (FJ\$)	International Visitor Survey, MCTTT	\$3.03bn	\$0.50bn (unofficial estimate) ²³	FJ\$0.11bn (unofficial estimate)	-	-	FJ\$3.37bn
1.4	Direct tourism employment	Fiji's Direct Tourism Contribution, FBOS	28,839 (m: 17,225) (f: 11,614)	5,600 (unofficial estimate) ²⁴	-	-	-	28,839
2. Number of visitors								
2.1	International visitor arrivals a) Tourism Fiji stretch target b) Tourism Fiji trend target (Total visitor arrivals per year)	Visitor Arrivals, FBOS	894,389	146,905	31,618	a) 318,524 b) 269,209	a) 674,760 b) 581,353	a) 1m b) 894,389
2.2	International visitor bed nights (Number of bed nights sold per year)	Hotels and Tourist Accommodation Statistics, FBOS	3,773,326	735,733	141,261	1,274,096	2,699,040	4,000,000
2.3	Domestic visitor bed nights (Number of bed nights sold per year)	Hotels and Tourist Accommodation Statistics, FBOS	889,293	525,331	520,777	444,646	666,970	889,293
3. Occupancy								
3.1	Accommodation provider occupancy (Annual percentage of total rooms occupied)	STR data (To be cross-referenced with Hotels and Tourist Accommodation Statistics, FBOS)	72%	25%	26%	40%	55%	75%
3.2	Accommodation provider revenue per available room (RevPAR), FJ\$	STR data	FJ\$250	FJ\$52	FJ\$48	FJ\$150	FJ\$200	FJ\$250

²³ Visitor spend in 2020 and 2021 is an unofficial estimate using the average visitor spend from the International Visitor Survey 2019 and actual visitor arrivals.

²⁴ Fiji Hotels and Tourism Association (October 2020) *Tourism Talanoa: Our Care Fiji Commitment*, Suva

	Metric	Source	2019	2020	2021	2022	2023	2024
3.3	International Air Capacity (seats per week)	Ailevon Pacific data	37,296	10,544	5,137	11,295	27,429	41,135
4. Dispersal								
4.1	Number of bed nights sold by area (and percentage of total beds nights sold) • Suva • Nadi • Lautoka • Coral Coast • Yasawa & Mamanuca group • Northern Division • Others	Hotels and Tourist Accommodation Statistics, FBOS	570,496 (12%) 1,942,208 (42%) 223,400 (5%) 1,005,002 (22%) 712,796 (15%) 148,799 (3%) 59,918 (1%)	273,849 (22%) 499,680 (40%) 75,690 (6%) 228,602 (18%) 118,738 (9%) 50,210 (4%) 14,295 (1%)	259,752 (39%) 243,151 (37%) 47,259 (7%) 76,031 (12%) 6,265 (1%) 27,714 (4%) 1,866 (0%)		tbd	tbd
4.2	Average number of areas/regions visited per visitor	International Visitor Survey, MCTTT	n/a	-	-	-	tbd	tbd
4.3	Average length of stay (all visitor categories, excluding cruise ships)	International Visitor Survey, MCTTT	9.6 nights	-	-	8 nights	8.5 nights	9.5 nights
5. Website								
5.1	Average unique users per month	Tourism Fiji data	-	-	128,274	150,000	200,000	400,000
5.2	New users	Tourism Fiji data	-	-	122,262	140,000	180,000	350,000
5.3	Sessions	Tourism Fiji data	-	-	171,120	190,000	250,000	450,000
5.4	Page views	Tourism Fiji data	-	-	246,665	300,000	750,000	1,800,000
6. Leads to operators								
6.1	Leads to operators per year	Tourism Fiji data (fiji.travel)	-	-	1,000,000	1,500,000	2,400,000	3,600,000
7. Social media								
7.1	Instagram	Tourism Fiji data	-	-	627,610	700,000	800,000	1,000,000
7.2	Facebook	Tourism Fiji data	-	-	134,266	200,000	250,000	500,000
7.3	Twitter	Tourism Fiji data	-	-	67,478	75,000	80,000	100,000
7.4	Other social Channels (Youtube, Pinterest, LinkedIn, WeChat..)	Tourism Fiji data	-	-	28,339	34,000	45,000	70,000
7.5	Email database	Tourism Fiji	-	-	17,332	18,000	25,000	50,000
8. Team								
8.1	Team satisfaction score "How happy are you working for Tourism Fiji?" (max = 10)	Tourism Fiji staff survey	-	-	-	8.5	8.6	8.7

	Metric	Source	2019	2020	2021	2022	2023	2024
8.2	Gender diversity percentage for Tourism Fiji workforce	Tourism Fiji employment records	-	-	-	Tourism Fiji workforce: 52% women 48% men	tbd	tbd
9. Brand awareness and perception								
9.1	Survey question: How familiar are you with Fiji? (Scoring out of 5)	Twenty31 Travel Survey	-	-	2.9	3.2	3.5	4.0
9.2	Survey question: What's your impression of Fiji? (Scoring out of 5)	Twenty31 Travel Survey	-	-	3.3	3.9	4.2	4.7
9.3	Survey question: How likely are you to recommend Fiji? (Scoring out of 5)	Twenty31 Travel Survey	-	-	-	3.6	3.9	4.4
10. Sustainability								
10.1	Visitor participation in sustainability activities	International Visitor Survey, MCTTT	-	-	-	tbd	tbd	tbd
10.2	Visitor awareness of sustainability measures and activities	International Visitor Survey, MCTTT	-	-	-	tbd	tbd	tbd
10.3	Number of Tourism Fiji staff trained in understanding sustainable tourism	Tourism Fiji training register	-	-	-	tbd	tbd	tbd

WHO WE ARE

Tourism Fiji operates with a head office in Nadi, Fiji, and offices and representative companies across the globe, including in Australia, New Zealand/Aotearoa, USA, China, the UK, Germany, Japan, Singapore and India. The primary markets Tourism Fiji targets include: Australia, New Zealand/Aotearoa, USA, South Pacific countries, China, Continental Europe, Japan and the rest of Asia (Singapore, Korea and India).

Direct flights into Nadi are operated via the Fijian national carrier, Fiji Airways, from a number of global ports including in Australia, New Zealand/Aotearoa, North America, Singapore, Japan and Hong Kong (due to return to operation mid-2022), as well as various Pacific Island countries. In addition, Australian carriers Qantas, Jetstar and Virgin Australia operate flights into Nadi International Airport, as does Air New Zealand. Nausori Airport, outside the capital, Suva, receives international flights from Auckland, Sydney and several Pacific Island countries, as well as being a hub for domestic flights.

Tourism Fiji is a learning organisation. We have learned a great deal from the past two years, and are stronger for it. We acknowledge the difficulties that many in our industry and our team have faced. As optimism returns with reopening, Tourism Fiji seeks to ensure our team members feel recognised, safe, valued, and proud of the contribution they are making to Fiji's development.

OUR VALUES

We have worked together to develop collective values that define our approach to our work and each other.



WE MAKE A DIFFERENCE

- We grow, we share, we embrace opportunities to learn
- For the industry, for Fiji
- We strive for excellence, achieve results and grow
- We never settle
- We do it right, the first time



BE AWESOME

- We bring energy and pride to what we do
- We're passionate about Fiji and our industry, and we celebrate achievement
- We're positive
- We have the bula spirit
- We make it happen



TOGETHER WE WILL

- We are genuine, and we respect and trust each other
- In a safe place, we embrace our culture/s and we are proudly Fijian
- We inspire - each other, the next generation, the industry
- We allow people to be themselves and champion this diversity
- We achieve as a team and we break down silos
- We are seen, and our voice is heard
- We act honestly, with integrity and respect
- We get involved



Go BOLDLY

- We are professionals, unafraid and brave
- We own it
- We show up and we're real
- We inspire - tourists, each other, the industry, Fiji
- We continuously improve
- We move forward
- We see what needs to be done and we do it



WE PUT OUR HAND UP AND MAKE IT HAPPEN

- We embrace change
- We are transparent
- We communicate
- We are agile
- We lead, and we are trailblazers
- We compare ourselves to the best

Tourism **fiji**

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