



FIJIAN TOURISM 2021

REPUBLIC OF FIJI

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Foreword by the Honourable Minister for Industry, Trade and Tourism



I am pleased to present the Fijian Tourism 2021 (FT 2021), the sectoral development plan for the Fijian tourism industry. FT 2021 outlines the policy measures and strategies that will help progress our economy for all Fijians. Tourism in Fiji has recorded growth year after year despite the many challenges faced. This comprehensive sectoral plan will help continue this positive trajectory and achieve a \$2.2 billion industry by 2021. The implementation of FT 2021 will also play a vital role in consolidating Fiji's position as the tourism hub of the Pacific.

In 2017, tourism employed approximately 118,500 people in Fiji. It is the largest sector in our economy and represents 34 percent of Fiji's GDP. Visitor arrivals have seen consistent growth, and in 2018 alone, grew approximately 3 percent to reach a record 870,000 international arrivals.

Having achieved sound arrival growth, Fiji is now focusing on increasing the value of tourism. Strategies include growing arrivals from high value markets, increasing the share of value retained in the Fijian economy, and spreading the benefits of tourism throughout the country. In this context, it is crucial for the Fijian Government to deliver a sound tourism industry development plan that focusses on tourism developments of most value to Fiji. This is what FT 2021 will do.

The areas identified in the plan are interrelated. The goal of achieving a \$2.2 billion industry will rely on the coordinated activities and investment from Government, non-government organisations and private sector stakeholders. As we embark on this new strategic journey, let's continue to work closely together to achieve the vision set out in FT 2021 and move the Fijian tourism industry to even greater heights.

Vinaka vakalevu

A handwritten signature in black ink, appearing to be 'Premila Kumar', written in a cursive style.

Premila Kumar

Hon. Minister for Industry, Trade and Tourism

Statement from the Permanent Secretary for Industry, Trade and Tourism



The Fijian Tourism 2021 (FT 2021) development plan is the culmination of extensive collaboration from Government Ministries, our statutory organisations, the private sector, development partners, educational institutions, civil society and foreign missions in Fiji. Without their commitment, we would not be able to deliver this comprehensive development plan. I would like to thank all those involved and acknowledge their contributions to the Fijian tourism industry. Particular thanks go to the International Finance Corporation (World Bank Group) for partnering with the Ministry in the finalisation of FT 2021. Their technical expertise and invaluable advice has made this plan possible.

Increasing the value that tourism brings to Fiji is the cornerstone of FT 2021. The goal of FT 2021 is to grow the Fijian tourism industry from its 2016 value of FJD\$1.6 billion to an industry worth FJD\$2.2 billion by the end of 2021. The overarching focus of the plan is to maximise tourism yield, while achieving a sustainable growth rate of visitor arrivals.

In order to achieve this focus and the goal of a FJD\$2.2 billion industry by the end of 2021, FT 2021 is divided into nine (9) Thematic Areas that are considered critical in taking the industry forward:

1. Driving demand for Fiji's tourism brand;
2. Increasing the value of the Fijian tourism product;
3. Facilitating and promoting foreign and domestic investment in tourism;
4. Investing in tourism related infrastructure;
5. Strengthening linkages to the tourism industry;
6. Ensuring continued sustainable development of the tourism industry;
7. Building a conducive and updated legal framework for the tourism industry;
8. Enhancing risk management in the tourism industry; and
9. Measuring the performance of Fiji's tourism industry.

Under the nine thematic areas, there are a total of 28 strategies that the Ministry, together with its stakeholders, will implement in order to achieve the focus and goals of FT 2021.

Since setting the FT 2021 targets, the tourism sector has already begun rising to the challenge of addressing the strategies set out. This reflects commitment and collective effort to own FT 2021 and ensure the continued sustainable development of Fiji's largest sector.

The Ministry of Industry, Trade and Tourism is committed to leading the implementation of this Plan. We look forward to the collective support of all stakeholders in its implementation to make Fiji a premier tourism destination in the world.

Vinaka vakalevu

A handwritten signature in black ink, appearing to read 'Shaheen Ali', with a horizontal line underneath.

Shaheen Ali

Permanent Secretary for Industry, Trade and Tourism

Abbreviations

FAL	Fiji Airports Limited
COP 23	23 rd Conference of the Parties to the United Nations Framework Convention on Climate Change
EDF	Events Development Fund
EIA	Environmental Impact Assessment
EMA	Environment Management Act
EFL	Energy Fiji Limited
FCCC	Fijian Competition and Commerce Commission
FHEC	Fiji Higher Education Commission
FHTA	Fiji Hotel and Tourism Association
FLMMA	Fiji Locally Managed Marine Areas
FNU	Fiji National University
FRA	Fiji Roads Authority
FRCS	Fiji Revenue and Customs Services
FTPF	Fijian Trade Policy Framework
FT 2021	Fijian Tourism 2021
GDP	Gross Domestic Product
HDCS	Hotel Data Collection System
IRDs	Integrated Resort Developments
IVS	International Visitor Survey
MICE	Meetings, Incentives, Conventions and Exhibitions
MITT	Ministry of Industry, Trade and Tourism
MSME	Micro, Small and Medium Enterprises
NDMO	National Disaster Management Office
NGO	Non-Governmental Organisation
p.a.	Per annum
RE	Rural Electrification
SIDS	Small Island Developing States
SOFTA	Society of Fiji Travel Associates
SOP	Standard Operating Procedure
SPTO	South Pacific Tourism Organisation
TCC	Tourism Crisis Communication
TELS	Tertiary Education Loan Scheme
TK&EC	Traditional Knowledge and Expressions of Culture
TRT	Tourism Response Team
TSA	Tourism Satellite Account
VFR	Visiting Friends and Relatives
WAF	Water Authority of Fiji
WTTC	World Travel and Tourism Council
UN	United Nations
UNEP	United Nations Environment Programme
UNFCCC	UN Framework Convention on Climate Change
UNWTO	United Nations World Tourism Organisation
USP	University of the South Pacific

Executive Summary

Tourism is an important driver of the Fijian economy. In 2017, Fiji received more than 842,000 visitors, who spent \$1.9 billion¹ across the industry, employing approximately 118,500² Fijians. The industry contributed approximately 34%³ towards the Fiji's Gross Domestic Product (GDP).

The Fijian Government has identified tourism as an important future driver for economic activity in Fiji. As the sector moves into a more complex phase of its development with growing visitor arrivals, tourism development will require greater coordination amongst stakeholders to ensure the potential of the sector is optimised.

Fijian Tourism 2021 (FT 2021) is a development plan that has been prepared by the Fijian Government with the vision of growing Fiji's tourism industry from \$1.9 billion in 2017, to an industry worth \$2.2 billion with 930,000 visitor arrivals by the end of 2021.⁴ The overarching focus of the plan is to maximise tourism yield, while achieving a sustainable rate of visitor arrival growth. Therefore, increasing the value that tourism brings to Fiji is the cornerstone of the FT 2021.

Tourism-related policies and legislations are explicit indications of the Fijian Government's approach to sustainable tourism development. They are indicative of the roles that all stakeholders in the industry must play. FT 2021 identifies strategies for Fiji to increase visitor expenditure and maximise tourism yield, to provide a conducive environment for the tourism industry's growth, and to ensure sustainability of the tourism industry through legislation and policies. A key issue addressed by FT 2021 is the implementation, monitoring and enforcement of existing legislation, as well as the need for clear policy guidelines of the Fijian Government.

To increase visitor expenditure and maximise tourism yield, Fiji will build high-end value-added tourism services, positioning itself as the hub of tourism in the Pacific. Through diversified and differentiated 'must experience' products, domestic and international tourists will be motivated to travel outside traditional tourism areas and spend in a variety of regions. To deepen impact to the local economy and spread benefits, Fiji will also strengthen linkages between the tourism industry and related sectors of the economy. Supporting micro, small and medium sized tourism operators to enhance quality and provide appropriate services will further the impact of tourism through increased employment, competitive local sourcing and community linkages. Finally, by active monitoring and measuring of the tourism industry's performance, Fiji will be able to proactively plan for growth and create an evidence-based framework for continued sector improvement. Improved data collection and timely dissemination of information will allow, both Government and industry, to make adjustments to changing circumstances and to take advantage of new opportunities through the FT 2021 implementation. To achieve this, FT 2021 identifies the following themes:

- Driving demand for the Fijian tourism brand
- Increasing the value of the Fijian tourism product
- Strengthening linkages to the tourism industry
- Measuring the performance of the Fijian tourism industry

Maintaining industry growth relies on a supportive enabling environment, an investment climate that encourages innovation, effective collaboration between the Government and private sector and forward planning for infrastructure and services. These elements, along with increased international and domestic air access, will create new pathways for sector development, allowing domestic and foreign investors to identify diverse opportunities and turn them into business ventures. Greater investment in the tourism industry, particularly in high value tourism products, will drive long term profitability, innovation and growth, and assist Fiji in differentiating itself from competitors. To support these objectives, FT 2021 identifies two themes:

- Facilitating and promoting foreign and domestic investment in tourism
- Investing in tourism related infrastructure

Additionally, to ensure sustainability of the tourism industry, Fiji will support the streamlining of legislation and policies of the Fijian Government, encourage environmental and cultural conservation, and build safety and security for our visitors. This will be realised through the following themes:

- Ensuring continued sustainable development of the tourism industry
- Building a conducive and updated legal framework for the tourism industry
- Enhancing risk management within the tourism industry

The areas identified in the plan are interrelated, as the goal of achieving a \$2.2 billion industry will rely on the coordinated activities and investment from Government, non-government organisations and private sector stakeholders.

¹ Fiji Bureau of Statistics

² WTTC, Tourism and Travel – Economic Impact, Fiji, 2018 (incl. indirect impact)

³ Reserve Bank of Fiji Macro-Tech Committee Economic Indicators

⁴ Refer to Annex 2 for details on projection calculations

How to read the FT 2021

The FT 2021 provides a Situational Analysis in each Thematic Area, from which key findings are developed and strategies formed. The strategies are further divided into sub-strategies with identified key considerations, which provide the means of achieving the sub-strategies. It should be noted that the key considerations provided in the Plan are necessary, but the success of the sub-strategies are not strictly limited to these.

The FT 2021 will have an Implementation Matrix, a living document which will guide the implementation of the Plan, this is attached as Annex 1. The implementation of the FT 2021 will be done in partnership between the Fijian Government, private sector and civil society. The Implementation Framework is detailed in Section 4.

1 Tourism 2021

1.1 Introduction



The Fijian economy is predominantly made up of services (71%) followed by the industries sector (19%) and the primary sectors (10%) including agriculture, forestry and fisheries.

In recent years, Fiji has undertaken major structural and economic reforms to promote economic growth and development. As a result, the Fijian economy is experiencing one of the best growth cycles since its independence. In 2018 Fiji recorded its ninth consecutive year of growth. Major factors which contributed to the sustained increase in growth of the economy are derived from creating a business friendly environment and private sector growth. In particular, initiatives by the Government (including tax concessions and incentives) and accommodative policies have also played a part in higher levels of investment.⁵

International trade in tourism services has grown spectacularly since the 1970s. In 2017, travel and tourism generated US\$8.2 trillion across the global economy, accounting for 10.4% of global GDP and supporting 1 in every 10 jobs globally, according to the World Travel and Tourism Council.

Tourism growth has an important impact on the development of the Fijian economy. Tourism is by far the most significant among Fiji's international trade services sectors. According to the Fiji Bureau of Statistics (FBOS), earnings from tourism in 2017 recorded over \$1.9 billion. The tourism sector is estimated to support close to one third of Fiji's total labour force and remains one of the most important sources of livelihood for Fijians. As Fiji's largest earner of foreign exchange, growth in tourism earnings will continue to be critical to achieving sustained economic progress.

In order to minimise dependence on any one market, development will be achieved by diversifying markets, while at the same time seeking to both maintain and expand the traditional short haul markets of Australia and New Zealand. Emphasis will be placed on ensuring that the Fijian tourism industry thrives through sustainable and inclusive development, in spite of increasing international competition.

The Fijian Government will ensure that future development of the tourism industry is aligned to relevant national laws and policies, which include:

- 1) Constitution of the Republic of Fiji
- 2) 5-Year and 20-Year National Development Plan
- 3) Green Growth Framework for Fiji
- 4) Republic of Fiji National Climate Change Policy
- 5) Tourism Fiji Act 2004
- 6) Fijian Trade Policy Framework 2015 – 2025
- 7) Fiji 2020 Agriculture Sector Policy Agenda
- 8) Foreign Investment Act 1999 (including incentives and related policies and regulations)
- 9) Land Management policies and new Initiatives
- 10) Environmental Laws
- 11) Integrated Coastal Management Framework
- 12) National Biodiversity Strategy and Action Plan
- 13) Labour laws
- 14) Income Tax Act and Regulations
- 15) Film Fiji Act 2002
- 16) All tourism related legislations

⁵ Fijian Trade Policy Framework (2015 – 2025)

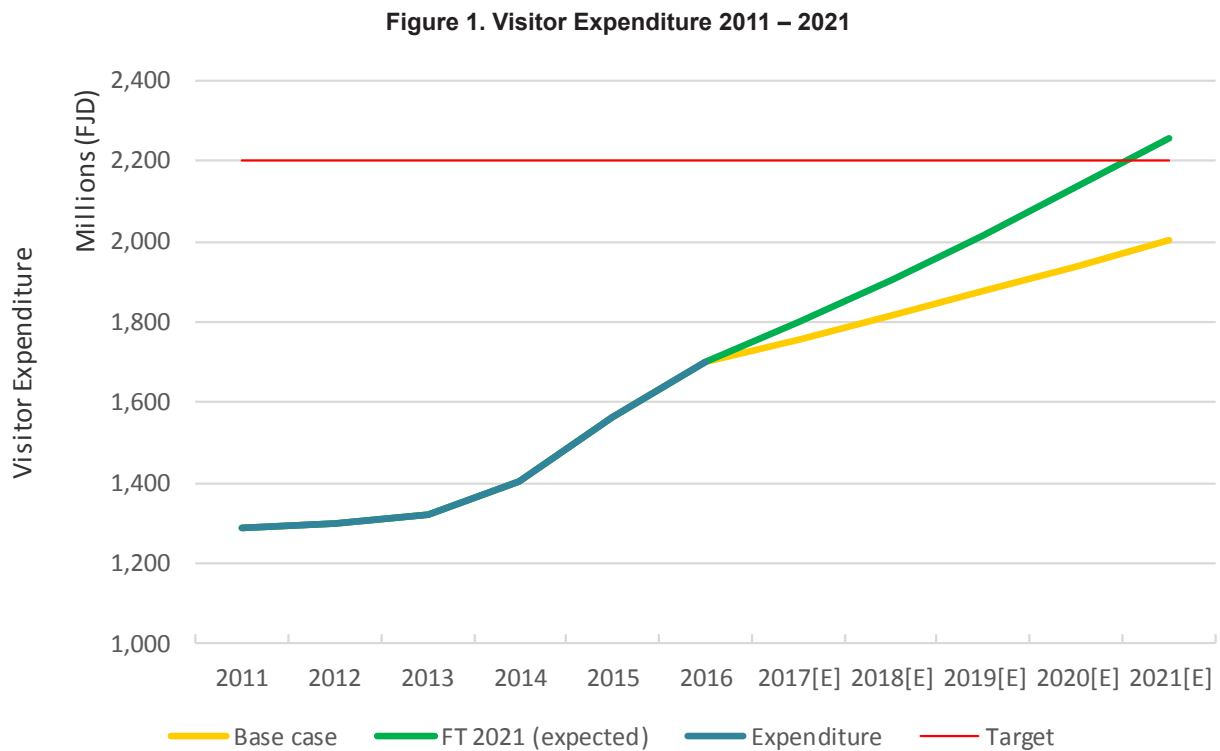
1.2 Vision

The overall vision of the Fijian Tourism 2021 is to grow tourism into a \$2.2 billion industry by 2021, increasing arrivals to Fiji to 930,000, deepening the amount spent by visitors, and spreading benefits from tourism throughout the country, while developing a sector that is increasingly sustainable and inclusive in the future.

1.3 Objectives

Fijian Tourism 2021 aims to achieve the following objectives, by the end of 2021:

- Increase in direct visitor spend to \$2.2 billion
- 930,000 visitor arrivals to Fiji



The forecasts for these objectives are explained in Annex 2.

This vision will be achieved by focusing on the thematic areas and implementing the strategic priorities identified by the Government and industry and presented in FT 2021. The Thematic Areas identified are:

- Driving demand for the Fijian tourism brand
- Increasing the value of the Fijian tourism product
- Facilitating and promoting foreign and domestic investment in tourism
- Investing in tourism related infrastructure
- Strengthening linkages to the tourism industry
- Ensuring continued sustainable development of the tourism industry
- Building a conducive and updated legal framework for the tourism industry
- Enhancing risk management within the tourism industry
- Measuring the performance of the Fijian tourism industry

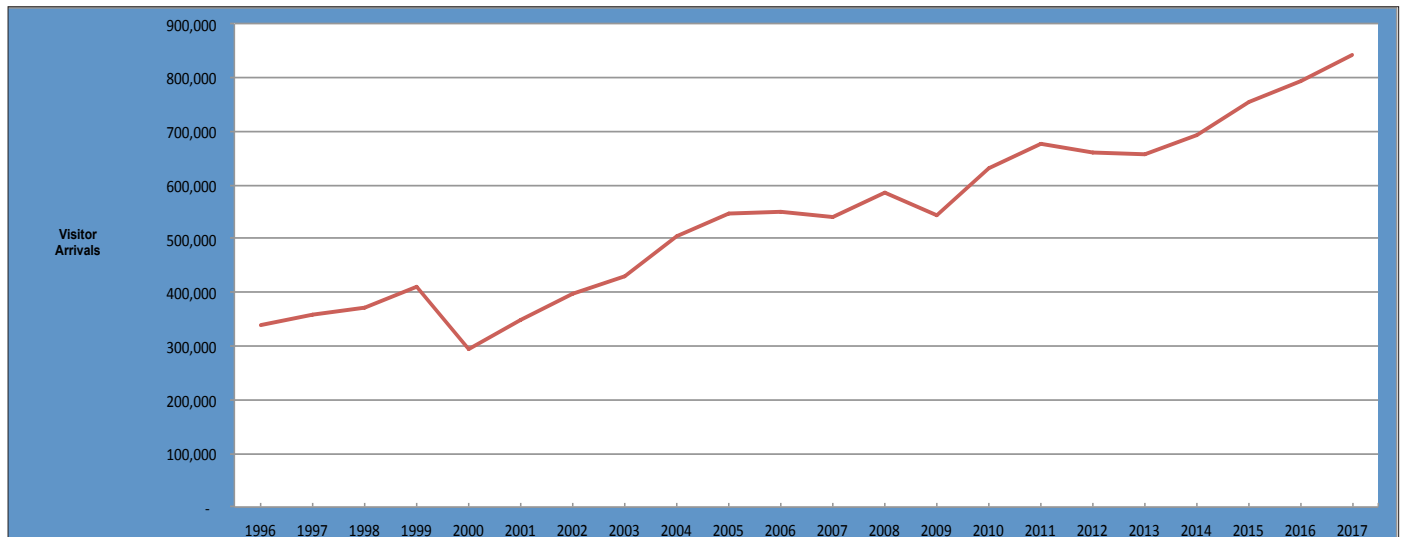
2 Situation Analysis

The goals set out in the FT 2021 are based on knowledge of the existing markets and industry trends at global, regional and national levels. The following situation analysis is based on data from Fiji's 2017 International Visitor Survey (IVS), as well as data from FBOS.

2.1 Visitor Arrivals

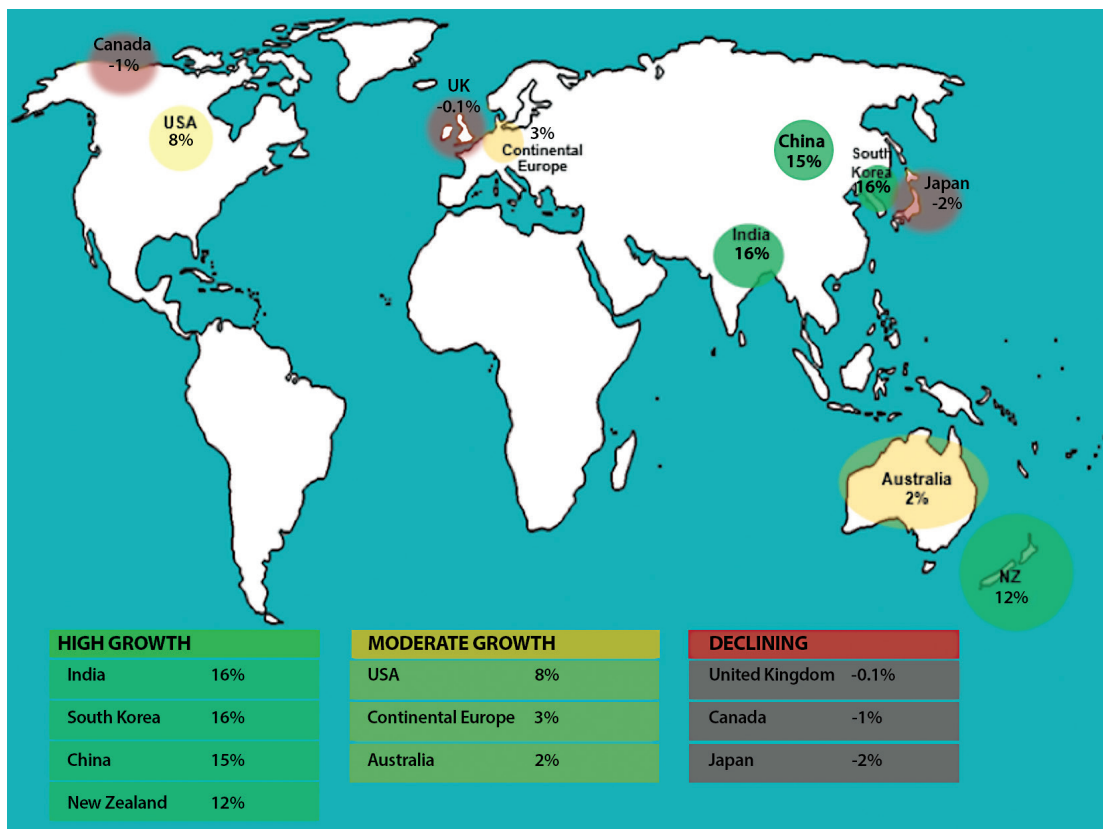
Over the past 20 years, Fiji has experienced a steady growth in international visitor arrivals. FT 2021 looks to build on the favourable upward trajectory in visitor arrivals by shifting the focus to the overall value of the Fijian tourism industry on the economy.

Figure 2. Visitor Arrivals to Fiji 1996 – 2017



(Source: Fiji Bureau of Statistics)

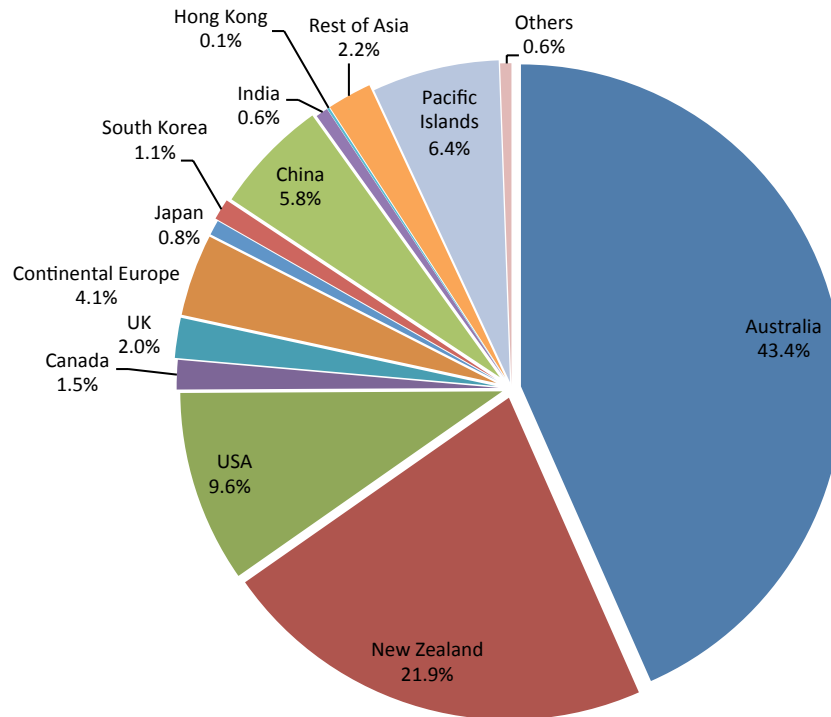
Figure 3. 2013 - 2017 Visitor Arrivals Average Annual Growth by Country of Origin



(Source: Fiji Bureau of Statistics)

Fiji's highest growth markets for the past five years were India, South Korea, China and New Zealand whilst the UK, Canada and Japan market saw a slight decline. Australia remains Fiji's largest market, with the number of Australian visitors growing at an average rate of 2%. Since 2013, tourist arrivals to Fiji have grown by an average of 5%.

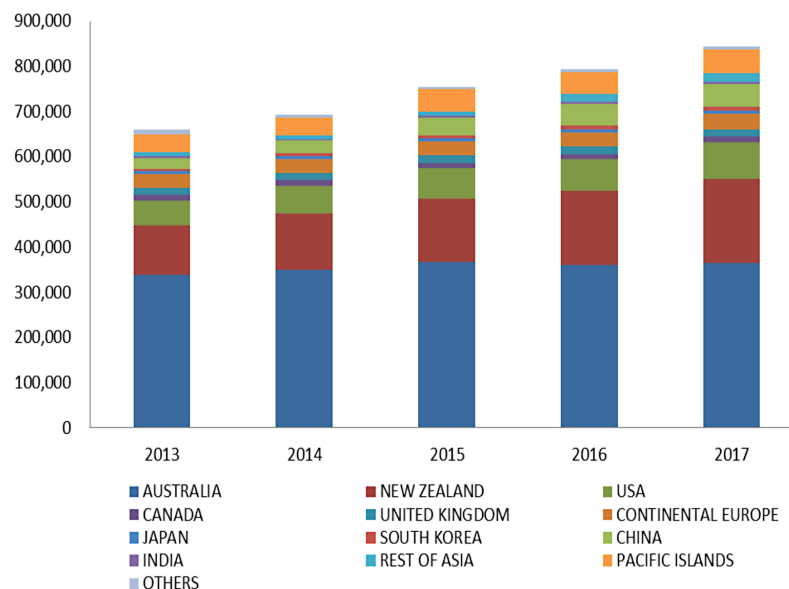
Figure 4. Share of Visitor Arrivals by Country of Origin 2017



(Source: Fiji Bureau of Statistics)

In 2017, Fiji received 842,884 visitors of which 43.4% of visitors were Australians and 21.9% were New Zealanders. Combined, these markets account for almost two-thirds of all visitor arrivals to Fiji. In relative terms, these are concentrated and traditional source market, for which Fiji is a short haul destination. In 2017, North American visitors made up 11.1% of arrivals, while UK and Europe made up 6.1%, and China accounted for 5.8%. Visitors from Pacific Islands made up 6.4% of arrivals.

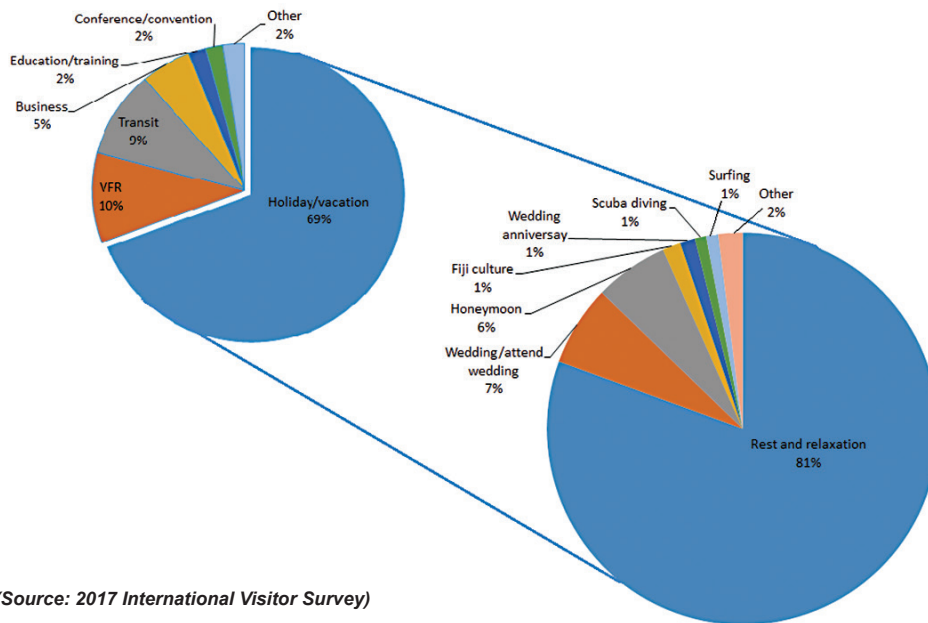
Figure 5. International Visitor Arrivals by Country of Origin, as a Share of Total Visitors 2013-2017



(Source: Fiji Bureau of Statistics)

Fiji has seen an increase in the share of visitors from a number of countries from 2013 to 2017. Markets that have shown significant share of total visitors include India (10.5% share growth), South Korea (9.9% share growth), China (8.7% share growth) and New Zealand (6.5% share growth). This is followed by the United States (2.5% share growth) and the Pacific Islands (1.8% share growth). The growth in Asian visitor arrivals represents a particular opportunity for diversifying Fiji's source markets.

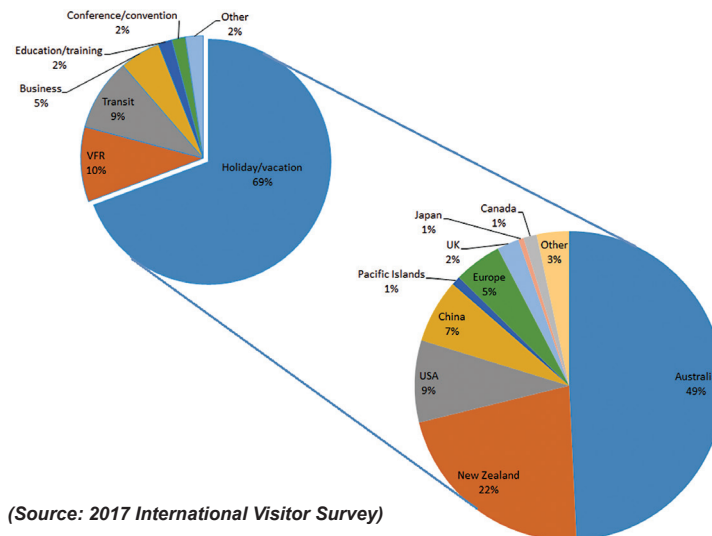
Figure 6. Holiday/Vacation Arrivals by Main Reason for Holiday/Vacation 2017



(Source: 2017 International Visitor Survey)

In 2017, holiday/vacation visitors made up 69% of arrivals⁶, highlighting the importance of holiday visitors to Fiji's tourism industry. Data from Fiji's 2017 IVS shows that most holiday/vacation visitors to Fiji (81%) cite 'rest and relaxation' as their main reason for visiting. Weddings or anniversary (8%), honeymoons (6%), culture (1%) and activities, such as scuba diving (1%) and surfing (1%) also attract holiday visitors.⁷

Figure 7. Holiday/vacation Arrivals by Country of Residence 2017



(Source: 2017 International Visitor Survey)

Within the holiday market, Australia (49%) and New Zealand (22%) remain the largest source markets of all holiday arrivals. North America represents the next largest market at 10% of holiday arrivals, with USA contributing 9% and Canada 1%. Smaller but still significant source markets include China with (7%), Continental Europe (5%) and the UK (2%) of holiday arrivals respectively.

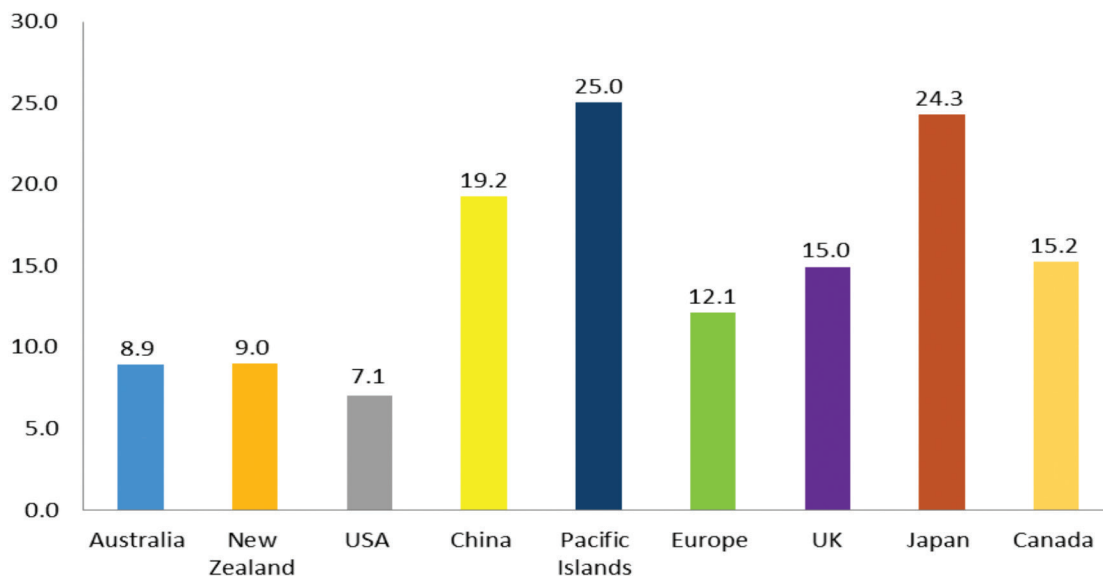
⁶The total based of arrivals does not include transit passengers

⁷2017 Fiji IVS provisional data

2.2 Length of Stay and Repeat Visitation

In 2017, data from the Fiji IVS exhibit that visitors spend an average of 11.7 nights in Fiji. Repeat visitors tend to stay longer – averaging 13.9 nights against 9.6 nights for first time visitors. Across source markets, visitors from the Pacific Islands stay the longest (25.0 nights), while visitors from the United States stay for the shortest period (7.1 nights).

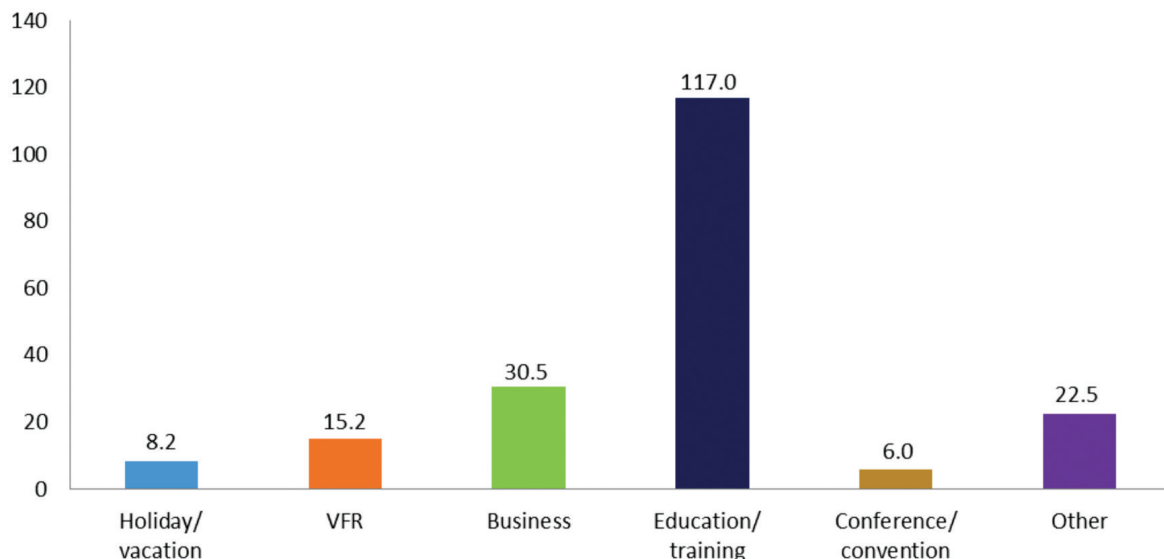
Figure 8. Average Length of Stay (nights) by Country of Residence 2017



(Source: 2017 International Visitor Survey)

Examining visitors based on purpose of visit, holiday visitors spend an average of 8.2 nights in Fiji per trip while those visiting for a conference spend 6.0 nights in Fiji. Visiting Friends and Relatives (VFR) and business travellers spend longer in the country with an average length of stay of 15.2 nights and 30.5 nights, respectively. Those traveling for education and training spend an average of 117.0 nights in Fiji per trip.⁸

Figure 9. Average Length of Stay (nights) by Purpose of Visit 2017

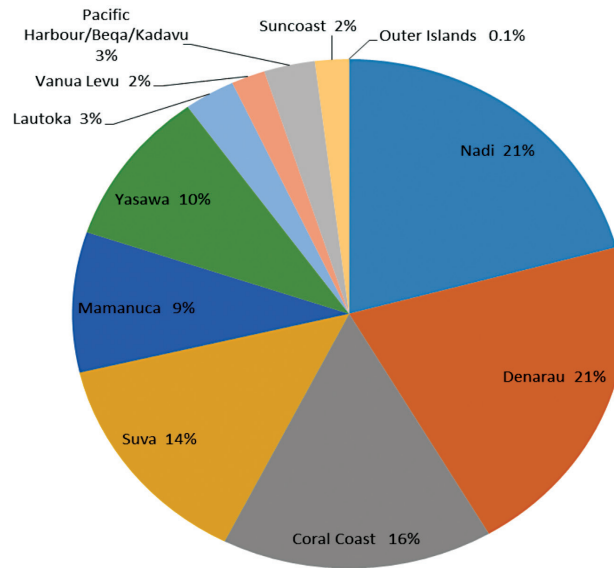


(Source: International Visitor Survey)

2.3 Visitor Distribution by Tourism Region

Fiji's 2017 IVS shows that 21% of all visitors stay in Nadi, 21% in Denarau and 16% in the Coral Coast. In summary, 58% of all visitors stay in one of Fiji's developed tourism destinations on the Western side of Viti Levu whilst another 14% stay in the capital city of Suva. The remaining 28%, or approximately 237,726 visitors in 2017, travelled to either the Yasawa Islands (10%), Mamanuca Islands (9%) or chose other regions of Fiji (10%).

Figure 10. Tourism Distribution in Fiji 2017



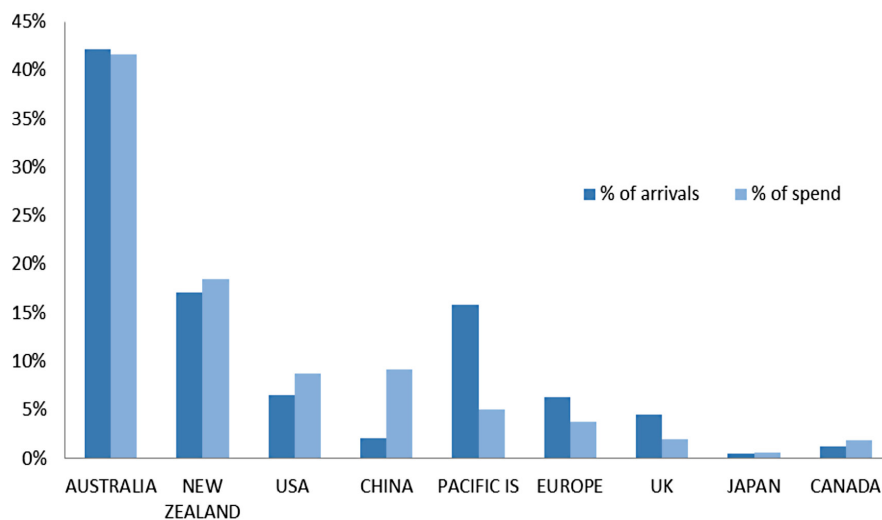
(Source: 2017 International Visitor Survey)

2.4 Visitor Expenditure

Source Market Spending Trends

In the 2017 IVS, Australian visitors accounted for 43% of total arrivals to Fiji and 42% of total spending by visitors. Australians spent an average of FJ\$252 per day and FJ\$2,246 per trip. On a per trip basis, China is the highest spending source market with each visitor spending an average of FJ\$3,604 per visit.

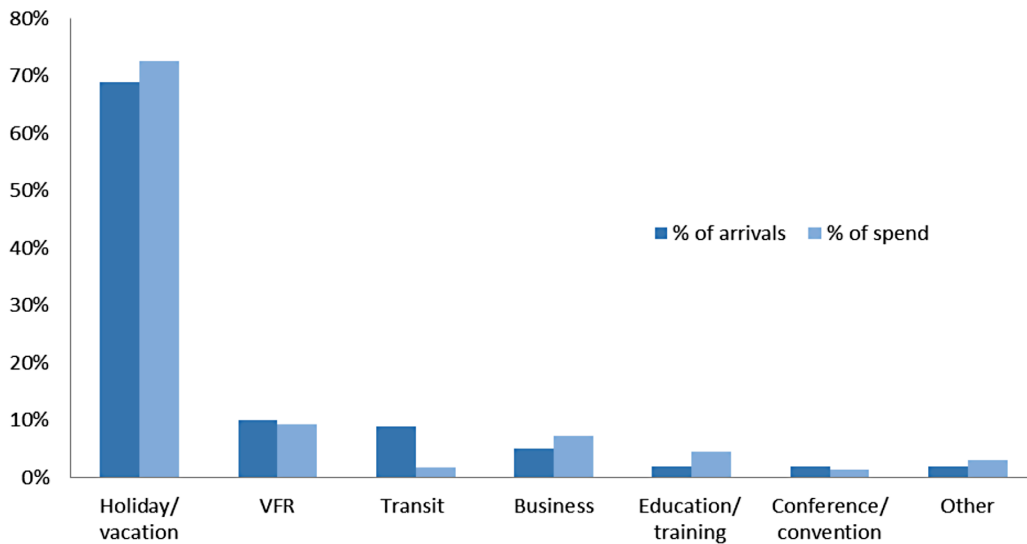
Figure 11. Comparison of Share of Arrivals to Share of Visitors Spend by Country of Origin 2017



(Source: 2017 International Visitor Survey)

The majority of Fiji's tourism earnings were from 'holiday' visitors, accounting for 73% of all spending.

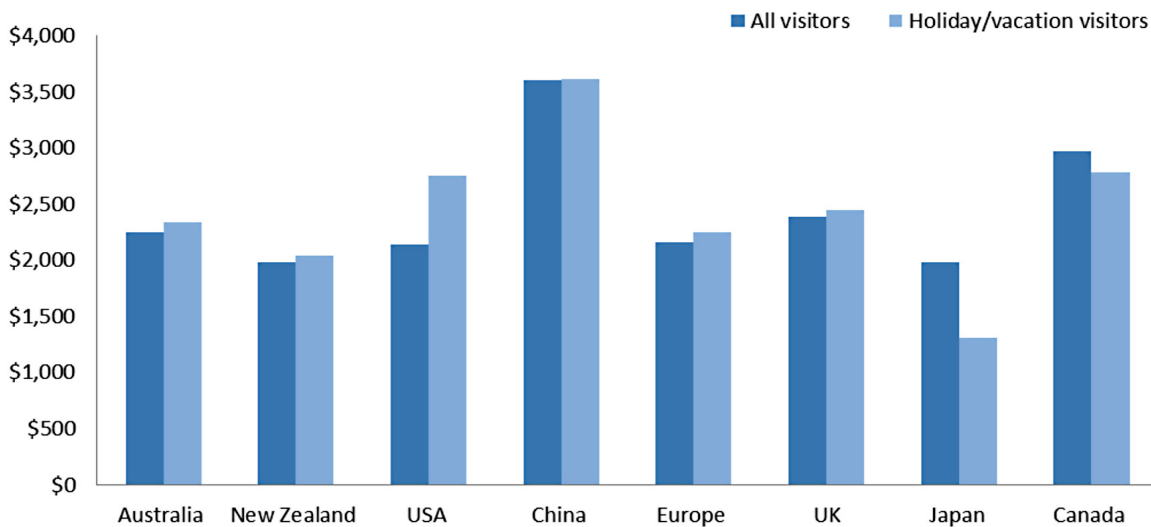
Figure 12. Comparison of Share of Arrivals to Spend by Purpose of Visit 2017



(Source: 2017 International Visitor Survey)

Holiday visitors are a valuable market for Fiji, as IVS data shows their spend in Fiji is higher than the average for all visitors. This pattern repeats itself across most countries of residence, with holiday visitors from Australia, New Zealand, USA, Continental Europe and UK in particular, spending more than average when visiting Fiji.

Figure 13. Average Visitor Spend Per Trip: Comparison All Visitors to Holiday/Vacation Visitors by Country of Residence 2017



(Source: 2017 International Visitor Survey)

2.5 Key Market Trends

A number of trends in global travel preferences are emerging which will affect the preferences of visitors to Fiji in the coming years. Generally, the trends point to a stronger business case for developing higher-value and unique products and services, and a market opportunity to develop inclusive tourism experiences. These trends will help Fiji gain more value from its tourism sector over time.

Global Tourism Growth

In 2017, the direct, indirect and induced impact of travel and tourism generated US\$8.2 trillion across the global economy, accounting for 10.4% of global GDP and supporting 1 in every 10 jobs globally, according to the World Travel and Tourism Council (WTTC). Fiji is the driving force of tourism in the Pacific. In 2016, Fiji was the destination for 38.2%⁹ of all tourist arrivals in the region. Visitor arrivals statistics of the Pacific region are in Annex 3.

Global Travel and Tourism Trends

The Fijian tourism industry has traditionally been known as a holiday destination, where visitors rest and relax. The holiday market will continue to be important going forward, especially for the bulk of Australian and New Zealand visitors, and for the important family segment of holiday visitors to Fiji. However, several trends are impacting global travel, that support Fiji's desire to increase yield per visitor and disperse tourist spend across a great share of the country's businesses and communities.

The Free Independent Travellers (FITs) market continues to grow in size and importance. According to the TripAdvisor's TripBarometer 2016, 69% of global travellers are planning to try a new travel experience with 17% planning solo travel, this is even higher for Millennials with 25% of travellers planning solo trips. Although package holidays continue to remain popular due to their perceived value-for-money and convenience, more people are choosing to travel independently. This is linked to improved online booking systems, such as Booking.com and TripAdvisor, which have made it easier for visitors to research and directly book travel, tours and activities. Two-thirds of travellers use online channels to make accommodation bookings, according to the TripBarometer Report. An increase in the number of experienced travellers has also influenced this trend, as these travellers are more likely to make their own arrangements than book a package trip. Given the global growth of FIT travel, it can be expected that FITs will increase within the period of FT 2021. With no set itinerary, FITs can experience more products and services in multiple locations, driven by their own particular itinerary and tastes.

A second trend seen globally is visitors increasingly seeking to participate and engage with the people and environment in the places they visit. 47% of global travellers, in 2016, visited a destination because of its culture and people, according to TripBarometer 2016. The demand for immersive and niche tourism experiences is expected to increase over the period of the FT 2021, consistent with trends observed across the globe. Visitors will seek to participate in more activities and pursue special interests while in Fiji. The opportunity to add value through experience-based activities is immense. Examples include taking a journey up the Navua River to visit villages, trekking with the local guides in Bouma National Heritage Park and diving and snorkelling from a live-aboard boat.

A third important trend is that Fiji continues to attract a significant share of repeat visitors. According to the 2017 IVS, repeat visitors made up 49% of Fiji's arrival market. This trend, combined with the drive for visitors to try new things, indicates that repeat visitors to Fiji will be searching for new locations and experiences within a known destination. In Fiji, there is opportunity to draw on this trend and encourage the large repeat visitor market to stay somewhere new and undertake new experiences.

Additionally, the growth of emerging markets such as Asia, present opportunities for Fiji to attract new visitors. According to the ITB World Travel Trends Report 2017/2018, in the first 8 months of 2017, the global outbound travel grew by 6%. The Asian outbound travellers increased by 5%, and the forecasted growth for 2018 is 6%.

These global trends provide Fijian businesses and communities opportunities to develop varied products for travellers who are more likely to go "off the beaten" path and see more of Fiji.

Therefore, to capitalise on these opportunities, efforts need to be made to develop products in less travelled regions of the country. This requires thorough market research on emerging trends to enable better understanding of visitor preference and how Fiji can meet these needs. Additionally, sales channels need to be strengthened between new products and visitors, in parallel to developing immersive community-based tourism activities that allow entrepreneurs to link to emerging markets.

⁹ South Pacific Tourism Organisation Annual Review of Visitor Arrivals in Pacific Island Countries (2016)

3 Thematic Areas

The 9 thematic areas and 28 strategies identified in the Fijian Tourism 2021 takes into account the current situation of the Fijian tourism industry and trends that can be leveraged for growth and development. FT 2021, through its priority action areas, identifies strategies to develop the tourism industry to realise its full potential by 2021.



Area 1 Driving Demand for the Fijian Tourism Brand



Marketing is essential in ensuring that Fiji maintains its competitive edge in the international arena. Tourism Fiji engages with industry partners to maintain Fiji's presence in international markets, while enhancing its strategic marketing role. The Fijian Government will continue to provide Tourism Fiji a marketing budget to support consumer and tactical marketing initiatives.

Tourism Fiji also plays an increasingly important role in facilitating the development of visitor experiences and events to meet the needs of

Fiji's target markets. This marketing effort is further bolstered by Fiji Airways, Film Fiji, national sports teams and tourism operators. They have contributed significantly to Fiji's marketing efforts by making great inroads through Fiji's global campaigns and events.

Fijian Tourism Brand

Launched in October 2013, Fiji's global brand "Fiji – where happiness finds you" is based on three pillars:

- The place
- The people
- The experience

Tourism Fiji aims at delivering its mandate by better understanding how visitors derive happiness and matching Fiji's marketing messages and products to visitor needs. The main visitor needs identified by Tourism Fiji are in experiential areas such as Romance, Family Fun, Recharge, Special Occasion, Adventure, Culture and Relaxation.

Building on the existing brand is necessary to keep Fiji's brand fresh and aligned to the current visitor needs and market trends. Over time, visitor needs and market trends evolve requiring brand positioning, marketing and promotional strategies to be reviewed accordingly.

Tourism Fiji's annual marketing plan sets the tone for the Fijian brand campaign throughout the year. Industry participation in the various marketing and promotional activities is vital to provide the link between brand promotion and product availability, specification and sales. Therefore, the active participation and engagement with industry stakeholders in the development of Tourism Fiji's annual marketing plan is critical.

Whilst there is a good level of collaboration amongst agencies given the task to promote Fiji such as Tourism Fiji, Fiji Airways, Film Fiji and Investment Fiji, there is scope for further strengthening coordination and partnership to advance the Fijian tourism brand.

Furthermore, brand growth and increased visibility and awareness amongst travel and tourism consumers can be greatly leveraged through better collaboration with Fiji's various diplomatic missions, trade commissions and other statutory organisations.

Seasonality

Seasonality in Fiji's tourism industry results from the outbound travel trends in the key Australian and New Zealand source markets. The seasonal nature of the Fijian tourism industry, among other things, directly affects hotel occupancy and employment which results in greater uncertainty during these periods.

In order to address the issue of seasonality, there is an urgent need to establish innovative travel stimulus to be able to attract visitors outside of the tourism peak seasons, while simultaneously decreasing dependence on Fiji's traditional markets.

Trends and Insights

Based on both quantitative data and anecdotal insights from tourism industry leaders, traditional visitors such as couples, families and backpackers will continue to be important market segments.

Additionally, the Meetings, Conferences, Incentives and Exhibitions (MICE), Special Interest Travellers and Sports segments are considered high value growth markets for Fiji.

MICE – Meetings, Incentives, Conferences and Exhibitions

Fiji is increasingly playing host to major events like the African, Caribbean and the Pacific (ACP)-European Union (EU) Joint Parliamentary Assembly, Climate Action Pacific Partnership (CAPP) Meeting, Informal Ministerial Pre-COP Meeting, 13th Triennial Conference of Pacific Women, 6th Meeting of Pacific Ministers for Women, Joint Regional Commission Meeting for the UNWTO, FAO Regional Conference for Asia and the Pacific and will host upcoming meetings such as, the 52nd Annual Meeting of the Asian Development Bank in 2019 and the 2020 World Exchange Congress hosted by the South Pacific Stock Exchange.

While most hotels have some form of MICE facilities integrated into their properties, there is a conscious move by hotel developers and investors to include conference facilities in new hotel developments. For example, existing hotels such as the Intercontinental Fiji Golf Resort and Spa (Coral Coast), Grand Pacific Hotel (Suva) and Sheraton Fiji Resort (Denarau) have conference capacities of 450, 600 and 1,200 people, respectively. The recently opened Fiji Marriott Resort (Momi Bay) has a capacity of 400 people. This investment in MICE infrastructure by the industry provides Fiji with the necessary capacity and the opportunity to host different types of MICE events on varying scales.

Special Interest Travellers

Most inbound tourism operators in Fiji report growth in potential for special interest travellers. Activities, such as scuba diving and surfing can generate greater demand within this market. With better access and connectivity to Fiji's dive location and nature-based attractions (see Area 4), there is potential to increase the number of scuba dive visitors, as well as, those interested in "off-the beaten track" experiences like kayaking, trekking, bird watching, heritage tourism and historical tourism in the outer islands.

Visitors who come to Fiji specifically for surfing have been increasing for the last three years. This is bolstered by the growing international recognition of Fiji as a surf destination.

Another growth area that has potential to develop into a high-end niche segment for Fiji is yachting. Although a seasonal market, the growth in small yacht and superyacht arrivals will further increase opportunities for investment and development of the segment. It also assists in spreading the benefits of tourism to non-traditional tourism regions. There are certain challenges and infrastructural gaps which the Fijian Government is committed to addressing that is further elaborated upon in Area 4 - Investing in Tourism Related Infrastructure.

Beauty and Spa Therapy in Fiji also has potential to grow. A large percentage of hotels in Fiji already operate as a "Resort & Spa" and a number of properties have established their spa facilities as an integral part of their overall product.

Sports Events

The sports market has potential to attract visitors outside of seasonal travel, including sporting events that drive high number of spectators and attracts viewership through media. Following Fiji's historical Rugby Sevens win in the Rio Olympics and the introduction of the Fiji International Golf Tournament and Super Rugby, there has been an increase in interest to host international sporting events in Fiji.



These events provide an opportunity to boost visitor arrivals during off-peak seasons. Investment in the right facilities is necessary to ensure Fiji has the capacity to attract the right sporting events, which yield high returns for the tourism industry.

Emerging Markets

China and India are important emerging markets for Fiji. Access to the Indian market has opened up via the Singapore route and code sharing arrangements between Fiji Airways and Jet Airways. India is seen as a high value market, hence, there is a need to put more efforts in growing arrivals from India.

Visitor Information

Providing visitors with in depth and readily available information can deepen visitor spend, expand length of stay and support travel to new regions in Fiji. The Fijian brand and marketing strategies have created awareness of Fiji as a destination of choice in the minds of travellers. However, a comprehensive visitor guide, developed in partnership with relevant stakeholders, will complement this marketing campaign and ensure information on the range of experiences in Fiji is easily available.

As part of improving visitor information on Fiji's regions, the Fijian Government will work with the industry to develop visitor guides, aligned to the Fijian brand to boost the growth of special interest travellers.

Findings

Fiji's marketing efforts will need to focus on high-end, value adding tourism services to inspire visitors to travel outside of traditional tourism areas and spend in the local economy. FT 2021 has identified the following:

- Fiji's brand positioning needs to continuously be reviewed and revitalised to keep up with changing travel and tourism trends and be flexible enough to accommodate targeted marketing strategies;
- MICE, Special Interest Travellers and Sports are high yielding niche segments for Fiji. More emphasis in developing these niches is required through a consolidated approach by the Fijian Government and the private sector;
- Seasonality has impacted occupancy and employment in the industry. Although Australia and New Zealand will remain a key source market, growing arrivals from emerging markets is important to reduce the risks associated with reliance on traditional markets; and
- Product and destination information is important to encourage visitors to stay longer, spend more and travel to a variety of locations.

Strategies

Strategy 1 – Fijian Tourism Brand Promotion

The strategy aims to prioritise a brand review to determine the effectiveness of the "Fiji – where happiness finds you" brand and its positioning internationally. The review will support the potential development of a new or refined brand for Fiji as a destination. Furthermore, consultations are encouraged during regular industry meetings to gather industry feedback and assess industry needs. This will enable industry input towards the strategies and marketing activities of Tourism Fiji.

Sub Strategies	Key considerations
<p>Review and realignment of the Fijian brand Tourism Fiji, in conjunction with MITT, will implement a review of the “Fiji – where happiness finds you” brand to determine its relevance to current global travel trends and its appeal to consumers. Outputs of the review will determine brand realignment activities in each market.</p>	<ul style="list-style-type: none"> • Consultant identified to undertake Brand Health Research • Strategies developed for new or refined brand position based on market research • Clear objectives, deliverables and monitoring system integrated into branding plan
<p>Revitalise tourism marketing strategies The Fijian tourism industry is predominantly private-sector driven, therefore marketing strategies must be developed in consultation with the industry to ensure industry buy-in. Tourism Fiji will solicit input from the industry before they are presented during Industry Day.</p>	<ul style="list-style-type: none"> • Open consultations and support from industry • Detailed and clear marketing strategies developed and implemented in coordination with industry, with clear objectives, deliverables and monitoring system • Ongoing communication and dialogue amongst MITT, Tourism Fiji and stakeholders
<p>Strengthen partnerships among Fijian trade and foreign missions, Tourism Fiji, Film Fiji, Investment Fiji, Fiji Airways and industry partners in the promotion of brand Fiji Close collaboration will be encouraged amongst these organisations to dovetail initiatives in order to maximise marketing and promotional opportunities.</p>	<ul style="list-style-type: none"> • Open dialogue between partners • Strengthened partnerships and arrangements with clear objectives, deliverables and monitoring systems • Clear guidelines or criteria for brand co-promotion activities, such as appropriate choice of films that match the brand promise and promote the brand

Strategy 2 - Grow Off-Peak Season Events

Fiji will focus on a number of events that can grow significantly over the next few years to attract more international visitors, especially in the low season months between January and April. In particular, events will target the traditional and non-traditional markets, which have low arrivals during the off-peak season. Events held in Fiji, such as the Fiji Pro, Fiji International and Super Rugby have raised the profile of Fiji as a sporting destination with world class attractions. This momentum will be leveraged and Fiji will continue to bid for international events that can contribute positively to the Fijian tourism industry. Additionally, efforts to grow the MICE segment especially during low season will be pursued.

To further boost the growth of existing and the inception of new events, the Events Development Fund (EDF) will be strengthened. The EDF will continue to be a contestable fund based on a cost sharing arrangement between the Fijian Government, the beneficiary and the industry, using strict criteria for event selection and monitoring return on investments.

Sub Strategies	Key considerations
<p>Strengthen the Events Development Fund The EDF will be a contestable fund managed through MITT, using strict selection criteria. The fund aims to institutionalise the bidding process, endorsement, hosting of events and monitoring of return on investments on these events.</p>	<ul style="list-style-type: none"> • Adequate budget allocation for an EDF • EDF administration expertise is sourced • Detailed event proposal guidelines are developed and launched • Strong criteria and transparent selection process are developed and implemented • Selection committee includes event and tourism experts
<p>Promote international sporting events Sporting events have been identified as a major contributor to visitor arrivals globally. It will be an important driver of off-peak season arrivals, providing an avenue to position Fiji as a sports tourism destination that encourages return visits.</p>	<ul style="list-style-type: none"> • Research conducted on potential impact of sports tourism to assist in designing a list of high value events • Event management expertise is sourced and integrated into management plan • Detailed sporting events proposal guidelines are developed and launched • A 3-5-year calendar of sporting events earmarked for bidding, will be prepared
<p>Promote Fiji as a MICE destination The Fijian Government will formulate supportive policies and incentives to promote the MICE segment. Additionally, Tourism Fiji to develop a marketing strategy to tap into global and regional MICE market.</p>	<ul style="list-style-type: none"> • Research conducted on best practices in the MICE segment polices and incentives • Sufficient interest, support and capacity from industry to develop the MICE segment • Marketing strategies presented to the FT 2021 Implementation Committee, ensuring close consultation with industry stakeholders such as FHTA and Fiji Airways.

Strategy 3 – Integrate Visitor Information

This strategy aims to ensure delivery of the Fijian brand promise by consolidating comprehensive information on products and services in visitor guides. It will serve as a critical link between Fiji's marketing campaign and the products available on the ground for visitors.

New technology provides the opportunity for efficient management of information and easier updates directly from operators. It has created demand from markets for user-friendly platforms and up-to-date information on experiences. Therefore, the visitor guides will need to be made available in multi-platforms for ease of access and management.

Additionally, internet connectivity in key tourism establishments is encouraged so as to compliment access to information by visitors. The availability of Wi-Fi connectivity in hotels, cafes and restaurants will also boost efforts to promote products on various online platforms.

This strategy also aims to explore the re-introduction of visitor information desks in Nadi and Suva as a pilot. The visitor information desks will provide a physical point of contact for visitors to access real time travel information and assistance that they may not otherwise be able to acquire via alternative platforms.

Sub Strategies	Key considerations
<p>Streamline and strengthen electronic visitor guides Comprehensive visitor guides will be used for marketing Fiji's products to potential visitors and as a primary visitor information source when travelling in Fiji.</p> <p>Visitor guides will be specific to the regions' product offerings in an attempt to highlight the unique selling point of a particular tourism region.</p>	<ul style="list-style-type: none"> • Transparent and impartial process for the submission and inclusion of products and services • Process for ensuring quality and accurate information is developed and implemented • Supply of information in a timely and consistent manner from various tourism regions and business types • Industry coordination and support for the awareness of the visitor guides • Easy to use system for updating information • Use of latest and emerging technologies for information dissemination • Clear incentive for participation of businesses
<p>Establish visitor information desks Visitor information desks in various tourism hubs will be supplied with up to date and pertinent information to allow visitors to directly enquire and seek independent opinion. MITT to facilitate with implementing partners, including municipal councils, while Tourism Fiji provides the marketing collaterals.</p>	<ul style="list-style-type: none"> • Industry buy-in and ongoing support, including provision of accurate and timely information to visitor information desks • Process for assessing and managing quality of visitor information desk services is designed and implemented with industry support • Sufficient budget allocation for the planning and managing of the information desks • Local authority coordination and support for the ongoing management of the information desks

Area 2 Increasing the Value of the Fijian Tourism Product

Visitors are becoming increasingly well informed about travel options and demand value for money in their purchasing decisions. Provision of high quality, innovative tourism products and experiences and excellent customer service are essential to Fiji's tourism performance against international competitors.

Fiji's Accommodation Value

Out of the 11,191 rooms in Fiji, 32% are premium, 28% are budget, 24% are mid-range and 17% are classified as high quality. This is shown in Table 1, with the definitions of each classification provided below.

Table 1. Room Inventory Summary 2017

REGION	Exclusive (\$2,500+)	Luxury (\$1,500- \$2,499)	Deluxe (\$500- \$1,499)	High (\$250- \$499)	Medium \$100- \$249)	Budget (<\$100)	Total
Nadi	2	69	1,296	955	1,261	805	4,388
Coral Coast	1	17	519	1,197	213	50	1,997
Suva	-	4	131	307	488	425	1,355
Mamanuca	28	70	709	123	13	19	962
North	53	50	165	73	246	215	802
Lautoka/Rakiraki	5	1	116	200	294	172	788
Pacific Harbour/Beqa	13	48	169	162	107	17	516
Yasawas	-	2	123	135	62	55	377
Tailevu/Lomaiviti	-	1	28	4	39	87	159
Cruise	34	-	52	25	-	-	111
Kadavu	6	21	25	10	26	23	111
Levuka	-	-	-	-	25	68	93
Lau	-	-	-	-	-	5	5
TOTAL	142	283	3,333	3,191	2,774	1,941	11,664

(Source: Tourism Fiji)

'Premium' (inclusive of Exclusive, Deluxe and Luxury) refers to hotels that offer the equivalent experience of a 5-star hotel or resort. Most of the Premium rooms (36%) are located in Nadi, followed by the Coral Coast (14%).

'High' refers to hotels that offer the equivalent experience of a 4-star hotel or resort. Almost a third of the High rooms are located in the Coral Coast (38%) whilst Nadi has 27%.

'Medium' refers to hotels that offer the equivalent experience of a 3-star hotel or resort. Large proportions of the mid-range rooms are located in Nadi (46%) and Suva (18%).

'Budget' refers to hotels that offer the equivalent experience of a 2-star or less hotel or resort. This includes backpacker and hostel accommodation. Almost a third of the budget accommodation in Fiji is located in Nadi (41%) and Suva (22%).

Fiji's Tourism Quality Measure

In order to provide value for money experience for visitors, Fiji must build on the natural hospitality of the Fijian people and focus on superior service delivery, consistency in accommodation that aligns with global expectations, quality, immersive activities and experiences that fulfil Fiji's brand promise.

Quality measures in the Fijian tourism industry are governed by various legislation that provide the relevant guidelines for tourism businesses to operate. Whilst various industry stakeholder's association have mandatory guidelines and quality standards within their associations, there is a need for overarching legislations to complement this and assist in governing the tourism industry.

Activities in Fiji

Activities play an important role in the tourism industry as they support the travel decision making process. In addition to raising the profile of Fiji as a visitor destination, activities also assist in creating a holistic visitor experience that stimulates visitor spend in different regions. In some cases, the experiences offered through activities can exist as a stand-alone motivator for travel.

Table 2 highlights the range of activities in Fiji and participation level by visitors. Majority of these activities occur within resort and integrated resort development areas, limiting visitor travel outside accommodation to spend in the local economy. Opportunity exists to develop and promote high-value activities that encourage visitors to travel and spend outside resorts, especially in less popular tourism destinations.

Table 2. Activities in Fiji 2017

TYPE OF ACTIVITIES	%	TYPE OF ACTIVITIES	%	TYPE OF ACTIVITIES	%
Beach volleyball	8	Canoeing/kayaking (fresh water)	6	Cave tours	4
Beach walking	47	Boat ride (fresh water)	7	Cultural centre/Fort, etc.	5
Laying on beach	38	Water Park	3	Village visit/tour	25
BEACH ACTIVITIES - NET	66	Fishing (fresh water)	4	Choir/concert	4
Swimming (salt water)	65	Pool games	7	Church service	8
Scuba Diving	7	Laying on poolside	38	CULTURAL ACTIVITIES - NET	54
Snorkelling	42	FRESH WATER ACTIVITIES - NET	57	Hot Air Balloon	0
Surfing	3	Bike riding/cycling	2	Helicopter Tour	1
Stand-up paddle boarding	13	Bowls	0	Sky Diving	2
Sailing/Yachting	5	Bushwalking/hiking	8	AIR ACTIVITIES - NET	3
Jet boat (salt water)	3	Football/rugby	3	Massage/spa	27
Boat ride (salt water)	26	Golf	4	Manicure/facial	4
Canoeing/kayaking (salt water)	18	Gym	6	Henna	2
Jet ski	4	Horse riding	2	Hair braiding	7
Wind surfing	1	Motor bike riding	0	Mud pool	4
Water skiing	0	Running/jogging	5	Fashion show	0
Banana boat	2	Squash	1	HEALTH AND BEAUTY - NET	33
Parasailing	1	Tennis	3	Babysitting	4
Deep/big game fishing	2	Volleyball	4	Bird watching	2
Other fishing	4	Pool/billiards	5	Cinema	4
Reef walking	6	Walking	50	Dancing/night club	9
Coral viewing	15	SPORTS ACTIVITIES - NET	60	Crab race/frog race	6
Dolphin watching	2	Kava drinking/ceremony	28	Reading	32
Fish feeding	9	Lovo	14	Shopping	44
SALT WATER ACTIVITIES - NET	72	Museum visit	2	OTHER ACTIVITIES - NET	61
Swimming (fresh water)	35	Meke	13	Any other activity not listed	3
Jet boat (fresh water)	1	Firewalking	6	No activities	9
Rafting/Bilibili	1	Fire dancing	20	NET	100

(Source: International Visitor Survey)

MSME Participation in the Tourism Industry

The Micro, Small and Medium Enterprises (MSME) sector makes up 97% of total establishments in Fiji and is dominated by the service sector¹⁰. It also accounts for approximately 18% of Fiji's GDP. For the Fijian tourism industry, MSMEs comprise of a large part of the non-accommodation segment such as tour operators and handicraft sellers. In addition to the current programmes supporting MSMEs, the Fijian Government is working on institutionalising a national MSME Framework, which will support the MSME Central Coordinating Agency.

Backpackers and budget travellers increasingly seek improved accommodation experience and higher levels of customer service. With more than a quarter of Fiji's accommodation dependent on backpackers, meeting these expectations can be a challenge for small scale operators. Additionally, small scale operators lack the technical capacity to integrate into existing online booking platforms. According to the 2017 IVS, 37% of visitors book their accommodation online, therefore, the ability to offer visitors online booking is critical for business development.



Findings

Visitors now have better access to travel options and seek value for money experiences. Efforts must be put into improving these experiences and providing better services to position Fiji as a world-class tourism destination that increasingly adds value to the local economy. Therefore, ensuring that accommodation options meet various visitor expectations, providing value for money services and addressing issues of accessibility is important.

Additionally, in order to increase quality throughout the tourism value chain, fostering the growth of MSMEs in the tourism sector is necessary. The FT 2021 has identified the following:

- There is need to develop higher standards to ensure consistency in standards across the sector in line with market expectations;
- Enhancing customer service must remain a priority to position Fiji as a world-class tourism destination;
- MSMEs in the tourism industry need support to enhance quality, understand and adapt to changes in the travel and tourism industry; and
- Encouraging community participation in tourism could open up new regions for visitors and spread the benefits of tourism throughout the country.

Strategies

Strategy 4 – Enhance Quality

Quality products and services are crucial for a successful tourism industry. Hence, the overall standard of all tourism-related services including accommodation, restaurants, tour guiding, tourism operators and frontline service providers need to be maintained and improved.

In this regard, the Fijian Government and the industry need to work together to identify the specific products and services where standards can be introduced to enhance the quality. It is also important to align the national standards to international standards.

¹⁰ Fiji Bureau of Statistics

Sub Strategies	Key considerations
<p>Encouraging adoption of higher standards for the tourism industry This strategy will involve developing national standards, in line with international best practices in the industry.</p>	<ul style="list-style-type: none"> • Proper research and strategic planning are conducted • Standards and guides are realistic, reflect the local context and do not burden businesses, especially MSMEs and community-based enterprises • Collaboration and consultation with stakeholders and outcomes incorporated in the guide • Cabinet approval
<p>Renew the FIJIAN HOSTS Customer Service Training Programme MITT will partner with relevant organisations and the industry to revamp the FIJIAN HOSTS Customer Service Programme. The programme aims to raise the standard of customer service at the Nadi International Airport and act as a benchmark for customer service in the Fijian tourism industry. As such, it will work towards national accreditation and encourage industry wide participation.</p>	<ul style="list-style-type: none"> • Revamp is based on best practices on tourism customer service programmes • Programme is reflective of the local context in terms of learning environment and Fijian hospitality • Programme is rigorous and certification is skill-based • Sufficient interest and support for certification from the industry • Development of programme for overall certification of accommodation/tour operators • Assessment and monitoring of programme is developed and implemented on a yearly basis with clear guidelines
<p>Establish Code of Conduct for tour operators A Code of Conduct will be established to ensure tour operators maintain the highest standards of service, especially when engaging with communities and visitors. Conditions will be issued with business licenses from the relevant authorities and any breach of the code of conduct may impinge on the decision to grant or renew a business license.</p>	<ul style="list-style-type: none"> • Code of Conduct to be developed in consultation with the industry and relevant stakeholders • Code of conduct reflects the local context and does not burden for the industry • Adoption by the industry on a voluntary basis first with the option to make it compulsory after a 2-year pilot • Monitoring System to ensure businesses are implementing the code of conduct consistently • MITT will pilot this with the Suva City Council.

Strategy 5 – Support Micro, Small and Medium Tourism Operators

Supporting MSMEs is critical to the growth of the tourism industry and for the continued improvement of quality and high-value visitor experiences. To keep up with changing visitor trends, the Fijian Government will leverage existing and new partnerships and programmes to ensure small scale operators can offer higher quality products and experiences.

In order to spread benefit of tourism throughout the country and into communities, an integrated approach to support MSMEs is required. In some areas, this will mean basic tourism awareness at community level on impacts of tourism, ways to make sustainable use of natural resources for tourism purposes and creating high-value tourism experiences.

In more developed areas of Fiji and at the national level, support for existing and emerging MSME industry associations will facilitate information and resource sharing. Given adequate support, these associations can be key partners in MSME development by coordinating industry sub-sectors, understanding member needs and communicating directly with Government. Building capacity of tourism industry associations will also allow better networking with related industry associations and improve the overall diversity and value of products and services.

Sub Strategies	Key considerations
<p>Facilitate access to online booking platforms for small tourism operators</p> <p>This initiative will capitalise on Tourism Fiji's current partnerships with online booking engines to support small scale tourism operators in gaining access to existing booking platforms. It will also rely on partnerships with organisations in the MSME sector</p>	<ul style="list-style-type: none"> • Support and attract interest from online booking platforms • Interest, coordination and cooperation from small scale tourism operators
<p>Use existing Government programmes to support tourism MSMEs</p> <p>The Fijian Government, through its existing programmes, will provide business mentoring, training, access to finance and other development assistance to small scale operators and ensure their sustainability.</p>	<ul style="list-style-type: none"> • Existing Government programmes source expertise in tourism to ensure applicability to industry • Professional mentoring services are quality, industry specific and accessible for a range of small-scale businesses in all tourism regions • Ensure a conducive regulatory environment for small scale tourism businesses • Adequate budget allocation for Government programmes • Effective project management and monitoring of progress by small scale tourism businesses engaged in the programmes
<p>Strengthening the capacity of MSME industry groups to better represent the interests of their members with Government and industry</p> <p>The Fijian Government, through its existing programmes, will provide business mentoring, training, access to finance and other development assistance to small scale operators and ensure their sustainability.</p>	<ul style="list-style-type: none"> • Industry associations are transparent and non-discriminatory • Opportunities for ongoing dialogue between industry and Government • Open communication and partnership amongst industry association for the benefits of small-scale tourism operators • Appropriate capacity building services for associations are available
<p>Conduct community tourism awareness</p> <p>Government, industry and key stakeholders will jointly conduct community awareness and encourage participation of resource owners in tourism development. Communities will be encouraged to partner or establish their own business ventures, thus spreading the economic benefits of tourism.</p>	<ul style="list-style-type: none"> • Appropriate technical assistance is integrated into the programme, including product development and business management training • Professional mentoring services and technical assistance are accessible • Effective project management and progress monitoring • Follow up programme designed for ongoing technical support for communities interested in pursuing tourism

Area 3 Facilitating and Promoting Foreign and Domestic Investment in Tourism

As stipulated in the 5-Year and 20-Year National Development Plan, Fiji will expand its tourism industry to niche segments, such as sports tourism, cruise tourism, wedding and honeymoon, MICE, wellness tourism, medical tourism, ecotourism and adventure tourism. To support this growth, the Fijian Government will continue hosting international events such as rugby, golf, sailing, major meetings and other events in Fiji. Therefore, investments in various tourism-related products are important to match the national vision.

This needs to be supported by private sector investments in the tourism industry. Both domestic and foreign direct investors play a very important role in ensuring that Fiji is able to capitalise on the growth factor. In the past 5 years, Foreign Direct Investment (FDI) in tourism accommodation alone is approximately \$473.9 million. In addition, as the global tourism trends and visitor needs are changing, for Fiji to remain competitive, tourism operators need to be innovative and continuously improve their products and services. Thus, having a conducive business climate and complementary strategies are vital to attract and facilitate investments.

Fiji's Investment Climate

Fiji has experienced economic growth at unprecedented levels over the past decade. This has been supported by investment levels averaging 25% of the GDP over the past few years. Investor confidence, both domestic and foreign, has been steadily increasing as shown by the high-value investments, particularly in the tourism sector.

Additionally, investment continues to be centred in the accommodation sector. Opportunities exist for investment in attractions, supporting products and services, given appropriate incentives and investment regulations are in place.

In order to continue the growth of both foreign direct and domestic investments, the Fijian Government is undertaking a digital transformation of the doing business processes in partnership with the Singapore Cooperation Enterprise (SCE). With the support of the International Finance Corporation (IFC), the Fijian Government is undertaking a review of the Investment Policy and relevant legislations to make it modern and more adaptive to the changing business environment.

Furthermore, in order to diversify and expand the economic base in the Western Division, the Ministry is leading the development of a Special Economic Zone. The Zone will be a one-stop-shop that will contain all the supporting infrastructure and utilities to attract high quality and targeted investments in the ICT, manufacturing and other services-based industries. This complements the Fijian Government's efforts to enable investment across Fiji.

Fiji's Tourism Distribution

Nadi and Denarau are known as the tourism hub of Fiji accounting for 42% of visitors and 35% of Fiji's tourism earnings or approximately \$690 million, the highest earning region in the Fiji¹¹. This is mainly because Nadi has the greatest concentration of accommodation ranging from high-end to backpacker. In addition, Nadi provides a vast range of tourism-related activities, attractions and large convention facilities with the added advantage of being home to Fiji's largest international airport.

Table 3. Distribution and Spend of Visitors 2017

	Nadi/ Denarau	Coral Coast	Mamanuca/ Yasawa	Suva/ Pacific Harbour/ Beqa/ Kadavu	Vanua Levu and Taveuni	Lautoka	Suncoast	Outer Islands
Total Visitors in Region	42%	16%	18%	17%	2%	3%	2%	0.1%
Total Spend in Region	35%	14%	20%	21%	4%	3%	2%	0.3%
Relative Yield by Visitation	83%	88%	111%	124%	200%	100%	100%	300%

¹¹ 2017 IVS provisional data

Table 3 shows that Nadi (including Denarau) has the lowest relative yield by visitation when compared to other regions despite having the greatest number of premium rooms.¹² This could be attributed to packages stay being paid off shore.

Suva/Pacific Harbour/Beqa/Kadavu, Mamanuca/Yasawa, Lautoka and Sun Coast are regions where tourism earnings are directly proportionate to the percentage of visitors it hosts. This indicates that there is more spend per person generated in these regions compared to others. This can be attributed to spend on domestic travel and more special interest travel including adventure tourism, dive and other activities that have significant value.

Proposed Accommodation Facilities

It is estimated that approximately 1,000 to 1,500 rooms of high and premium standard are in the advanced stages of planning or undergoing construction. Table 4 below presents a list of accommodation developments that have recently or are likely to be completed by 2021.

Table 4. Hotels and Resorts in Progress, 2018

PROPOSED HOTEL	LOCATION	ESTIMATED ROOMS
Pullman Resort	Nadi	236
Park Inn by Radisson	Suva	130
Holiday Inn	Denarau	173
WG Friendship Plaza	Suva	tbc
Wyndham Silkroad	Komave, Nadroga	370
Golden Bay International Resort and Spa	Lautoka	1,184
Sofitel So	Momi Bay	tbc
James Cook Hotel	Suva	40
Crowne Plaza Fiji	Wailoaloa Beach, Nadi	453

(Source: Ministry of Industry Trade & Tourism)

To ensure direct benefits of tourism is spread equally throughout Fiji, appropriate investments in rural areas with significant potential for tourism, in addition to accommodation is being encouraged. The Fijian Government recognises this need and has created large Tax Free regions with generous investment incentives to assist investors in identifying locations outside conventional tourism areas for development. A detailed map of the Tax Free Regions is included as Annex 4.

Fiji's Unique Attractions

Fiji offers a diverse range of visitor attractions and experiences that provide the edge over other competitors in the region and there is opportunity to assist many of these unique attractions to fully realise its commercial potential. With locations throughout Fiji, attractions help distribute the economic benefits of tourism to outer regions by encouraging visitor arrivals and spending. Annex 5 (Table 10) highlights some of the unique attractions and experiences Fiji has to offer in the different regions.



¹² Relative Yield by visitation is calculated as follows: Total spend in region divided by total holiday visits in region multiplied by 100

Nightlife

There are opportunities to develop world-class clubs and lounges to create a vibrant night scene, particularly in Nadi, given the consistent flow of visitors in and around the area. These venues can be used to attract international acts to do stage performances, drawing additional events-based visitor arrivals. Overtime, organised night events at these venues can become signature annual events that will add to the attraction of Fiji as a destination.

Capitalising on Transit Visitors

The waiver on departure tax for visitors transiting through Fiji for less than 72 hours presents an opportunity to develop attractions in and around the Nadi area. Attractions that are accessible to the airport in a short time frame would encourage transit visitors to leave the airport, engage and spend in the local economy. Other opportunities could include activities such as tours and visits to nearby attractions and communities. In addition, there is a need for more accommodation either within the airport premises or in close vicinity to specifically cater for transit visitors.

Findings

Tourism investment in Fiji and the Fijian Government's focus in facilitating investments must take into consideration:

- (i) sustainable nature of the tourism industry;
- (ii) value that the tourism development will generate;
- (iii) infrastructure capacity of the region; and
- (iv) investment contribution to the character of the region.

FT 2021 has identified the following:

- The Fijian Government is undertaking investment policy and related legislation review to make it modern and adaptive to changing investment environment. Furthermore, the approvals processes are being streamlined to improve ease of doing business;
- Fiji has tax incentives in place for investments in tourism accommodation developments, whilst tax free regions provide opportunity for investments in other tourism-related activities;
- Occupancy rates have increased at a greater rate than the growth rate of accommodation capacity over the last few years. While part of this is a commendable increase in arrivals during "low season", this does highlight a need to increase accommodation capacity to ensure that there is sufficient supply to meet future demand; and
- Suncoast and Vanua Levu have potential to be further developed for tourism as they have the basic infrastructure in place to cater for investment activity in tourism accommodation. These regions, along with Kadavu and Taveuni, specifically appeal to special interest travellers.

Strategies

Strategy 6 – Promotion and facilitation of investments in the tourism sector

The objective of this strategy is to ensure appropriate investments are realised in the tourism sector and Fiji has sufficient capacity to cater for the forecasted increase in accommodation requirements to complement the expected growth in future visitor arrivals.

As identified in the findings, investment activity in the tourism sector is largely confined to accommodation. Therefore, opportunity exists to grow and add value to Fiji's current tourism products and services in order to better cater for visitor needs and enhance visitor experiences. Better facilitation of investment opportunities is expected to play a major role in translating interest into actual investments. This needs to be combined with increases in flight and seat capacity to tourism regions outside of Viti Levu, ensuring that tourism benefits are distributed throughout the country.

Sub Strategies	Key considerations
<p>Building the capacity of Investment Fiji Capacity building to specialise in promoting and facilitating high-value investments and investments in new areas of the tourism sector.</p>	<ul style="list-style-type: none"> Provision of resources to Investment Fiji to increase capacity for tourism investment promotion that is supplemented with technical advice and training where necessary
<p>Develop a tailor-made incentive package to encourage investment in visitor attractions and related activities This incentivised investment programme will be targeted at Fijians who can develop quality immersive products and experiences for visitors.</p>	<ul style="list-style-type: none"> Collaboration between MITT, Investment Fiji and Fiji Revenue and Customs Services to develop tailor-made medium to long-term investment policies and associated incentive packages targeted at retail, accommodation, activities and attractions-based investments Ensure a conducive regulatory environment with appropriate guidelines Provide adequate advice and training where necessary
<p>Strengthening and streamlining investment approval process This will be done to fast-track and attract desirable investments in the tourism sector.</p>	<ul style="list-style-type: none"> Increased collaboration between Investment Fiji, Trade Commissions and diplomatic missions to promote tourism investment opportunities Collaboration between investment approval agencies to work towards online approvals systems

Strategy 7 – Stimulate Product Diversification and Development across Fiji

In an increasingly competitive global tourism industry, immersive, innovative, and value driven experiences to attract and retain visitors is necessary. These experiences will enable Fiji to effectively compete with other tourism destinations on factors beyond price. However, investment in attractions and tours alone cannot stimulate spending across all the segments.

Developing Fiji's reputation as an international shopping destination will require significant investments in infrastructure, a supportive regulatory environment and specific marketing strategies. A coordinated effort in key markets such as Australia, New Zealand, USA and China is needed to position Fiji as a commercially viable investment destination for large-scale retail complexes and to attract international retailers. This initiative will complement Fiji's direct flight to Singapore and Japan, as well as existing routes targeted at attracting more Asian visitors to Fiji who have a strong affinity towards luxury shopping. While the initial focus will be to attract international brands, this must be done in parallel with investments in Fijian Made products, which will benefit the local economy in the long term.

Furthermore, in order to maximise sustainable utilisation of Fiji's natural and cultural resources, there is a need to support investment in these products, particularly with local investors. Fiji's wealth of artistic traditions also present opportunities for development of theatre, arts, music and visual performances geared towards tourists. Supporting targeted niche and alternative market research will encourage investors, both local and foreign, to identify and pursue these investments.

Sub Strategies	Key considerations
<p>Create a world class luxury shopping experience This aims to create an enabling environment to attract major international brands to support the development of a world class luxury shopping experience. As such, it will focus on:</p> <ol style="list-style-type: none"> private sector led investment in infrastructure to attract international brands; providing the right tax policy and location for private sector investment; and conducting a feasibility study to assess the viability of establishing a world class shopping hub, possibly at the Special Economic Zone (SEZ). 	<ul style="list-style-type: none"> MITT to coordinate the development of a tailor-made medium to long-term investment policy for consideration in the 2019/20 budget to attract sustainable investment projects in this area Increased collaboration between Investment Fiji, Trade Commissions and Diplomatic Missions to encourage investments that will position Fiji as a world class shopping destination Adequate incentives to garner private sector investor interest Understanding of the economic value to the local economy of developing luxury shopping
<p>Explore the potential of alternative or niche tourism Fiji, being a multicultural country, can capitalise on these strengths to explore niche tourism such as cultural tourism, medical tourism and culinary tourism.</p>	<ul style="list-style-type: none"> A study conducted to determine additional potential niche markets for Fiji Focused and high-quality research to provide a detailed understanding of potential alternative and niche markets

Strategy 8 - Utilise Fiji's Existing Natural, Cultural and Heritage Resources

Sustainable development of appropriate culture and nature based attractions throughout Fiji can create unique and immersive experiences. At the same time, this will spread the benefits of tourism to communities, foster sustainable livelihoods, and conserve cultural practices.

In addition to improving visitor experiences, the attractions will serve as a medium for developing Fijian entrepreneurship, employment and facilitate visitor education on Fijian history and culture.

Sub Strategies	Key considerations
<p>Rejuvenate existing natural, cultural and heritage sites for tourism use A Government-led programme to rejuvenate existing natural, cultural and heritage sites in Fiji including Suva, Levuka and Nadi. This will require leadership from land management and culture and heritage agencies to establish infrastructure and improve access to these areas. Private sector can then leverage this infrastructure to develop products and experiences for visitors.</p>	<ul style="list-style-type: none"> • Collaboration between Government, private sector and donor agencies/development partners • Proper planning including identification of appropriate sites and assets • Involvement of communities and local stakeholders to ensure they benefit • Collaboration with UNESCO • Maximise current MOUs with partners (e.g. knowledge sharing on development of cultural and heritage products)
<p>Promote Fiji as a cultural hub in the region through theatre, arts, music and visual performances Facilitate the development of cultural attractions to complement an integrated approach to tourism development.</p>	<ul style="list-style-type: none"> • Effective implementation of Public-Private Partnerships (PPPs) • Long term development of human resources within the arts sector • Encouraging exchange of culture and performing arts with partner countries • Developing cultural attractions in partnership with the private sector, development partners and NGO's

Area 4 Investing in Tourism Related Infrastructure

Continuous investment in essential services and infrastructure is necessary for the growth of the tourism industry. These investments can stimulate visitor arrivals, protect the environment, mitigate risk from natural and man-made crisis and leverage domestic and foreign investment. Therefore, continued investment to build new and upgrade existing tourism related infrastructure is essential to support additional capacity to cater for increased demand and ensure that tourism products are accessible to all.



Air Access to Fiji



The major air access to Fiji is through Nadi International Airport, the major airline hub for the South Pacific. Nausori International Airport caters for domestic flights and a small number of international flights from New Zealand, Australia and other Pacific Islands.

Direct air connectivity includes major source markets of Australia and New Zealand, as well as USA, Hong Kong, Singapore, Japan and South Korea. The direct flight to Singapore has opened up new markets in South East Asia and will further boost arrivals from emerging markets such as India. Fiji has the potential to increase connectivity under its current Air Services Agreements with 28 countries and 11 airlines.

International air connections to and from Fiji are shown below in Figure 13.

According to Fiji Airports Limited (FAL), air seat capacity in Fiji is in excess of 1 million passengers a year spread across 11 airlines. Fiji Airways has the most capacity (65% of total seats), followed by Virgin Australia (18%) and Air New Zealand (6%). Most of the growth in seat capacity to Fiji in the last five years has been out of Australia via Virgin Australia.

Seat capacity to Fiji is forecasted to grow by 5% to 6% a year over the next five years. Total passengers carried by Fiji Airways are forecasted to increase by 39% over the period of the FT 2021.

International air capacity to Fiji is dominated by Fiji Airways with July being a record month for passengers boarding a Fiji Airways flight. Fiji Airways has embarked on a five-year growth strategy (2014-2017) that focuses on improving the airline's financial performance and setting a growth capacity goal of 3.5% per annum. Growth in international visitor numbers has therefore largely been dictated by the speed of Fiji Airways fleet and capacity growth, and the relative health of the Australian and New Zealand source markets. In 2018, Fiji Airways plans to acquire five (5) wide-bodied Boeing 737 MAX to replace its existing 'narrow-bodied fleet', providing additional seat capacity in its short and medium haul routes to Australia, New Zealand, Hawaii, Kiribati, Samoa, Solomon Islands, Tonga and Vanuatu.

FAL is forecasting more than 1.2 million passenger arrivals to Fiji by 2021. This will be a 6% increase in passenger numbers when compared to 2020. 3% of the total passenger movement in 2021 will be transit passengers.

There appears to be no major constraints to increasing the number of aircrafts using the existing Nadi runway. There is restricted load capacity for 737 jets at Nausori International Airport due to the length and strength of the runway.

The Nadi Airport Terminal Modernisation Project came to a practical completion in April 2017 and was officially opened on 4 June 2018.

The departures lounge, check-in halls, and arrival areas have been renovated to provide world-class standards, better services and comfort to passengers. This will create an iconic Fijian landmark through the upgrades that are designed to improve passenger experience and dwell time. FAL continues to transform the airport experience for visitors and positively influence their first and last impression of Fiji as a destination.

For Nausori, the 20-year Nausori International Airport Master Plan recommends:

- Priority One – upgrade of approach lights, runway extension and new control tower;
- Priority Two – widen runway, complete road diversions and land/house acquisitions;
- Priority Three – new international terminal, jet apron, road upgrade and car parking; and
- Priority Four – further widening of runways, road diversions and land acquisition.

The current runway length will be extended from 1,670 meters to 2,140 meters and widened from 30 meters to 45 meters. Taxiways will be widened, and new parking apron created in readiness for terminal upgrade in future. Works will also include the construction of properly drained strip area, Runway End Safety Area (RESA), installation and upgrade of associated navigational aids, drainage for the site, diversion of the road infrastructure, new perimeter security fence and perimeter roading for increased safety and security access.

The upgrade and expansion of the airport will allow narrow body short haul jet aircraft - Boeing 737 and Airbus A320 to operate on greatly improved load capacity and with improved operational accessibility. The runway upgrade and extension project is the first stage of FAL's plan to modernise Nausori Airport. Once the runway project is completed, the next stage will be to build a brand new terminal for Nausori Airport.

Air access within Fiji



Fiji Link is the primary domestic carrier within Fiji, providing scheduled services to the outer islands. Charter operators such as Island Hoppers, Northern Air and Turtle Airways provide additional services to the outer islands on demand.

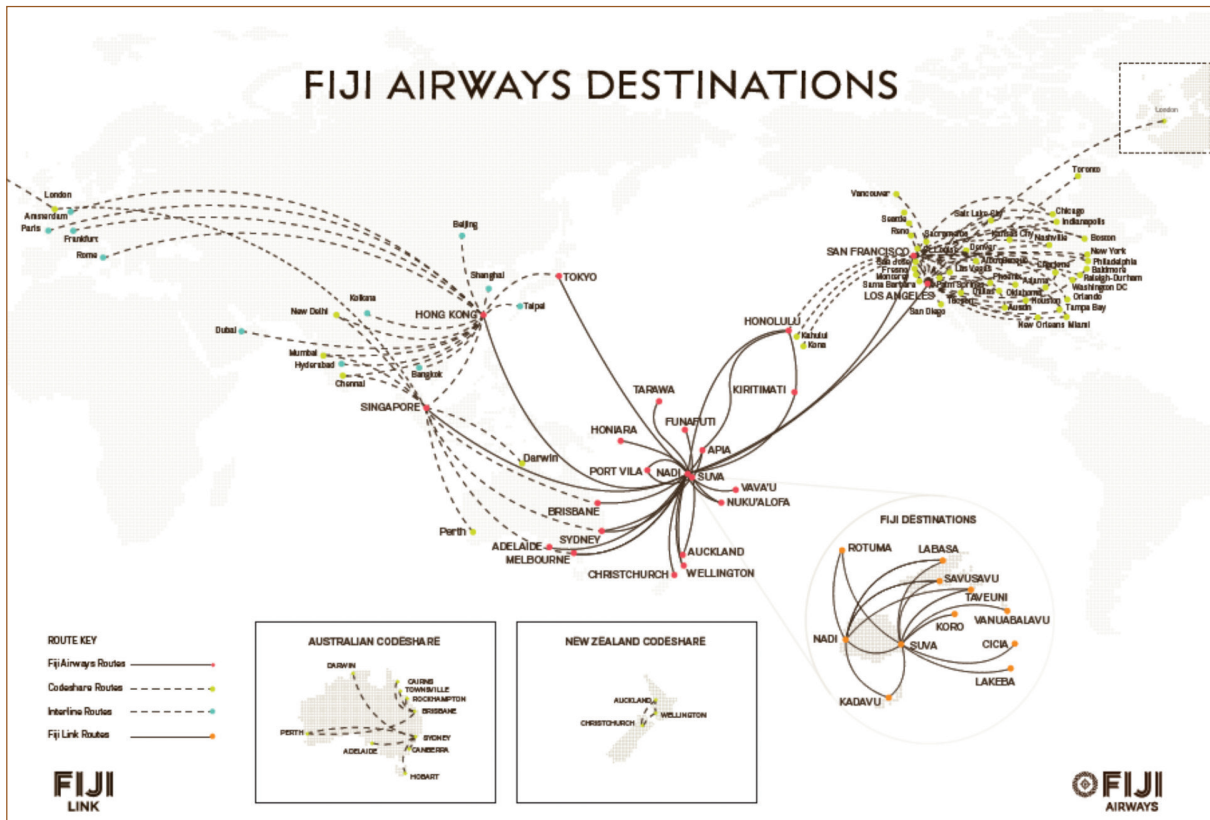
Loading on domestic air services operates at about 70% seat capacity with additional flights added when demand dictates. Total domestic passenger movements to the outer islands decreased from just over 77,000 arrivals in 2010 to 56,000 arrivals in 2012 but then increased to nearly 80,000 arrivals in 2013. Continued modernisation and increased capacity of Fiji Link's fleet is expected to increase its domestic seat capacity by 16% over the period of the FT 2021.

The domestic air connections are shown below in Figure 13.

While some tourism operations have invested in their own aircrafts, others rely on charter aircrafts to provide transport needs not covered by scheduled airline services.

FAL is currently working towards greater connectivity within Fiji focusing on developments to Fiji's local airstrips.

Figure 14. Air Connectivity in Fiji 2018, Fiji Airways



Future Plans

FAL's plans at this stage are for Nausori, Rotuma, Matei (Taveuni) and Vanua Levu. Smaller airstrips like Kadavu will be considered after these projects, between 2020 and 2021.

Rotuma: The Rotuma Runway Upgrade project has completed. Fiji Link will now be able to land ATR's in Rotuma and flights to the island will no longer be restricted by poor runway surface conditions. The increase in flight capacity from 5 seats to 40 plus seats will have a positive impact in an effort to create economic flow in the rural and maritime areas. The runway extension will now also allow the larger ATR 72-600 to land in Rotuma.

Matei (Taveuni): The scoping work for the runway extension at Matei in Taveuni has completed with internal reviews now being carried out by FAL. The Matei Runway extension will allow the ATR 42-600 to land in Taveuni.

Vanua Levu: FAL is working closely with Fiji Airways and Fiji Link to find a suitable location for an aerodrome in Vanua Levu. Factors such as clear length for runway development, height above sea level, proximity to mountains, and locations of other obstacles to the flight approach path need to be considered. The Fijian Government allocated \$200,000 in the 2016-2017 Budget to carry out these preliminary studies. For the Savusavu Airport, FAL and Fiji Airways had conducted a study which notes that it is not viable to extend the runway.

Installation of runway lighting systems at Labasa Airport is currently underway to facilitate night landing and is expected to increase flight frequency and flexibility of flight schedules for the benefit of travellers. FAL will also upgrade the Labasa terminal and extend the runway.

Road Links

Fiji's road network is largely confined to Viti Levu, Vanua Levu, Ovalau and Taveuni with short sections of unsealed roads on Kadavu, Koro, Gau, Rotuma and Moala. Almost all the main tourism regions in Viti Levu have sealed road access with a majority of tourism regions in Vanua Levu also accessible by sealed road.

Whilst road access is not a major constraint to tourism development in most areas, poor road infrastructure to the interior of Fiji often limits the potential for tourism expansion, with the associated benefits of spreading tourism revenues beyond traditional resorts.

Fiji Roads Authority (FRA) details several road upgrades in its Strategic Plan. The main ones relating to tourism are outlined in Table 5:

Table 5. Fiji Road Projects Status 2018

PROJECT	STATUS
Sigatoka Valley Road sealing	Recently completed
Nabouwalu Road sealing	Completed
Buca Bay Road sealing	Recently completed
Four-lane road from Nadi Airport to Denarau Roundabout	N1 Completed (Airport to Votualevu Road) [1] N2 predominantly completed (Votualevu Road to Wailoaloa Junction). New service lanes and additional middle median along Namaka and Martintar being finalised.
New relief road off the Wailoaloa Road to the Denarau Road	Recently completed
Four-lane road along the Suva – Nausori Corridor	S3 in progress – construction of drainage and relocation of utilities ongoing. 1.8km of sub base construction underway
Renewal and replacement of various deteriorated bridges throughout Fiji	Ongoing – Savu 4, Wainasusu, Vuma and Naisogo Bridges handed over. Naganivatu and Market Bridges approach roads under construction.
Renewal and replacement of jetties, including at Savusavu, Kadavu and Nabouwalu	5 jetty programmes in delivery. Works programmed for further repairs and upgrade jetties at Nabouwalu, Taveuni, Kadavu and Natovi. At Savusavu, the plan is to repair the existing jetty to prolong its life by a further five years while the full reconstruction of jetty including RORO facilities is planned and designed in consideration of the future adjacent property development intentions.
Suva Arterial Roads Upgrade Project	\$85.2m allocated in the 2017/18 budget – project on going – final wearing course completed at sites 4, 5, 7 and 8. All works targeted to be complete this financial year.
Denarau back road upgrade	Study complete – preliminary design included land acquisition to be budgeted for.
Four lane road Wailoaloa Junction to Nadi Bridge	Study Complete - preliminary designs include land acquisition to be budgeted for. Works to be staged and to be included in future budget allocations.
Four Lane Road from Nadi to Lautoka	Study Complete - preliminary designs include land acquisition to be budgeted for. Works to be staged and to be included in future budget allocations.
Maintenance, sealing and drainage works in Savusavu	Study completed – preliminary designs include land acquisition to be budgeted for. Works to be staged and to be included in future budget allocations.

(Source: Fiji Roads Authority)

Sea links and Cruise

Cruise vessels and yachts are other transportation services closely linked to the tourism sector. There is still much potential for the development of this sector, which includes the improvement of facilities and services to visiting yachties and cruise visitors.

The cruise industry is expected to continue performing well during the period of the FT 2021, with many cruise companies forecasting strong global growth in passenger numbers. The Cruise Line International Association (CLIA) estimates 28 million people globally will take a cruise in 2018.

Cruising out of Australia has been growing particularly fast, with Australia now being the world's second fastest-growing cruise market after China. In 2017, 1.1 million Australians were estimated to have taken a holiday cruise. Of these, more than one third of cruises leaving from Australian ports travelled to the South Pacific.

Domestically, access by sea to the outer islands is catered for by local shipping companies. However, these services are seldom used by international visitors because of the additional effort required to reach destinations such as Taveuni, Kadavu and Ovalau. The Yasawa and Mamanuca groups of islands are serviced by high speed ferries that have been instrumental in the growth of tourism in these regions.

To capture part of the wider sector growth and to support domestic sea travel, Fiji needs to ensure a number of issues are addressed. These issues include, but are not limited to, updating marine charts, improving wharf facilities to expand potential destinations for cruises and yachting, supporting product development at current cruise stops to increase the yield of the cruise sector and upgrading infrastructure, in particular assessing the economic viability of investing in a dedicated cruise terminal to service Suva.



Ports and Marinas

The main port and marina facilities serving the Fijian tourism industry are outlined below.

Table 6. Port and marina facilities in Fiji 2018

PORT / MARINA	CURRENT USES BY TOURISM INDUSTRY
Port Denarau	Ferry transfers to Mamanuca and Yasawa Islands. Port for charter tours, travelling super yachts and other boating. Cruise transfers to offshore cruise vessels
Lautoka – Queens Wharf	Visited by cruise boats. Provides services for general boating activities
Suva - Kings Wharf	Highly frequented by cruise boats
Multiple jetties in the Yasawa	Provide vital infrastructure for visitors and supplies throughout the Yasawa Islands
Savusavu Wharf /Marina	Used for supplies and cyclone mooring. Also a popular destination for yachts to cruise the north and eastern islands of Fiji
Buca Bay, Vanua Levu	Used for ferry services and small boat transfers to Taveuni
Waiyevo Wharf, Taveuni	Used for ferry services and resort transfers
Ovalau Wharf	Used for ferry services – limited use by visitors
Ellington Wharf	Used for ferry services – limited use by visitors
Nabouwalu Wharf	Used for ferry services – limited use by visitors
Vuda Marina	Popular yachting destination, ferry transfers to Mamanuca and Yasawa islands
Musket Cove Marina	Popular destination for yachts, ferries, water taxi and cruise operators catering to day trips and resort transfers
Natovi Jetty	Used for ferry services and visitor transport to islands

(Source: Ministry of Industry, Trade & Tourism)

Electricity

Current Status

The demand for energy in Fiji has increased over the years, mainly driven by the use of fuels and electricity. A significant number of Fiji hotel operators are practicing energy efficiency measures by using renewable energy sources to save money and reduce their environmental impacts. Medium and smaller tourism operators are faced with the challenge of limited financial and human resources as well as technical support to help pursue green energy projects.

There is a need to introduce and expand renewable energy usage and energy efficiency measures in the tourism industry, to both the larger industry players and the medium and small-scale operators.

Energy Fiji Limited (EFL), the major supplier of electricity in Fiji, provides grid power to Viti Levu, Vanua Levu and Ovalau. On Viti Levu, EFL has an interconnected grid that distributes power within the island. The supply is mostly concentrated within the urban areas where demand is high. The central and western regions of Viti Levu have an interconnected system linked via a 132kV transmission line between Vuda, Wailoa, Nadarivatu and Cunningham.

According to the EFL, the maximum power demand for Viti Levu is approximately 138MW while the generation capacity is much higher (see Table 7), meaning the capacity is there to cater for increased demand from tourism.

On Vanua Levu, two independent power grids supply the Labasa to Dreketi corridor and another line runs towards Savusavu from Saivou. The installed generation capacity for the two power stations is 9.3MW for Labasa and 4.8MW for Savusavu. Vanua Levu and Ovalau are solely dependent on diesel generators for power generation.

As shown in Table 7, Fiji's electricity system has additional capacity that will be able to cope with demand from the tourism industry over the period of the FT 2021.

However, the issue in some areas is not the amount of electricity required but the capacity of the distribution network i.e. the capacity of the cables running power to resorts.

Table 7. Electricity Supply and Demand, 2011 to 2017

EFL Grid	Annual Maximum Demand							Existing Grid Installed Capacity (MW)
	2011 (MW)	2012 (MW)	2013 (MW)	2014 (MW)	2015 (MW)	2016 (MW)	2017 (MW)	
Viti Levu	138.06	141.19	146.21	152.36	155.54	170.64	160.47	293
Labasa	6.89	7.79	6.75	7.10	7.50	7.70	8.30	17.7
Savusavu	1.92	1.90	1.93	2.02	2.17	2.24	2.20	5.3
Levuka	1.84	1.86	1.81	1.59	1.85	1.84	1.82	2.96
Taveuni	n/a	m/a	n/a	n/a	n/a	n/a	0.38	2.7

(Source: Energy Fiji Limited)

EFL's development conditions are based on the 'User Pay for Development Cost' strategy approved by the Fijian Competition and Commerce Commission. If a development requires in excess of 10KW of electricity, the developer is required to pay for the development cost. After 8 years of continuous usage, EFL refunds the development cost to the developer.

Future Plans

According to EFL's Power Development Plan 2011 – 2020, EFL will continue work on the Rural Electrification (RE) programme in consultation with the Department of Energy and the Ministry of Economy. The RE projects are undertaken after receiving the capital contribution from the Department of Energy and the Ministry of Economy. EFL's focus is on the RE projects that are close to the power grid in the areas on the main islands of Viti Levu, Vanua Levu, Ovalau and now Taveuni. EFL is also considering the use of alternative renewable energy such as biomass, solar, hydro and waste-to-energy schemes. These will be undertaken by EFL and Independent Power Producers.

The Leonardo DiCaprio Foundation is an example of a good initiative that provides funding for the supply of renewable energy to rural communities. The Fijian Government will work closely with Fiji Locally Managed Marine Area Network (FLMMA) and EFL on this initiative. FLMMA and EFL will provide the commercial and technical skills in making rural electrification projects successful and provide sustainable energy solutions to communities across Fiji. Additionally, the Nabou Green Energy was commissioned in July 2017.

Water and sewerage

Current status

The provision of reliable water supply and sewerage services is essential for tourism development. In some cases, outer island resorts face difficulties in sourcing water and need alternative sources to ensure consistency. Inadequate sewerage systems degrade the environment and constrain tourism growth by limiting development of tourism plans. The Water Authority of Fiji (WAF) has factored in all known resort developments in its Master Plan and acknowledges that improving water and sewerage systems are important for the tourism industry.

Water and sewerage treatment on Viti Levu and Vanua Levu is much less of a problem than on the outer islands. According to WAF, approximately 80% of the two main islands is covered either by mains or through a rural water supply scheme. The water supply and sewerage treatment schemes in the main tourism regions are operating close to capacity. The main issues for tourism in these areas includes inconsistent supply, slow repairs and upgrades.

Water supply and sewerage treatment systems in the outer islands has been an ongoing challenge faced by the tourism industry. Significant investment is required in the provision of reliable water supply and sewerage treatment systems with priorities to be given to the islands of Yasawa, Taveuni, Savusavu, Mamanuca Islands and Kadavu. Urgent upgrade work is required to avoid ground water contamination from inadequate disposal. It is also important to consider that the sewerage infrastructure in these regions are built in compliance with environmental codes to ensure sustainability.

Future plans

WAF has four master plan projects that were due for completion in 2016:

- Suva-Nausori Water – the greater Suva area is served by the two water treatment plants at Tamavua and Waila. WAF's target is that by 2020, approximately 95% of the greater Suva area will be covered with piped water supply.
- Suva-Nausori Wastewater Services – the current sewer reticulation covers approximately 44% of the total population in the Greater Suva Area. The Kinoya Treatment Plant for Suva does not have sufficient capacity for further growth. Suva needs increased capacity to cope with sewerage from both residential growth and tourism development.
- Nadi-Lautoka Water Supply Scheme – supplies water to two main population centres of Nadi and Lautoka, together with adjoining rural centres. The Nadi/Lautoka area is experiencing rapid growth, mainly for tourism developments and subdivisions for commercial and residential use. The many projected developments in the region will increase water consumption. The current capacity for the Nadi/Lautoka Water Supply system is close to its limit at 119 Mega Litres per day (ML/d) with peak demand now up to 96.43ML/d. Capacity will need to be increased.
- Sigatoka Regional Water Supply – this water network supplies water from Malevu Village (on the Sigatoka River) to Natadola. The current capacity is 12-13ML/d and the current demand load is 5.87ML/d. The demand is expected to increase significantly due to the rapid growth of resorts planned for Cuvu, Malomalo, Momi Bay and Natadola.

Currently, WAF is in the process of inviting bids for tenders for capacity upgrades at the following Wastewater Treatment Plants:

- Navakai Nadi
- Natabua Lautoka
- Olosara Sigatoka
- Pacific Harbour
- Suva – upgrading works are now in progress

WAF has started preliminary planning on formulation designs along Communal Septic Tank reticulation concepts that can be utilised to service outer islands and rural areas.

Findings

Growth in tourism requires the completion of ongoing infrastructure projects and commitment to new ones. FT 2021 has identified the following:

- The direct flight to Singapore and Japan has opened up new markets and must be maintained. An expansion of direct flights to China is also desirable;
- In order to ensure positive visitor experiences and to cater for additional capacity, the Nadi International Airport and Nausori International Airport modernisations are critical;
- Modernisation of Fiji Airways fleet and expansion and increase in international flight frequency is crucial where/when demand is high;
- To grow Fiji's non-traditional tourism areas, there is a need to increase capacity of domestic flights and conduct strategic planning for a new international airport in Vanua Levu; yachting); and
- To ensure sustainability of tourism infrastructure, water supply and sewerage systems require upgrades.

- To grow the cruise and yachting markets, there is a need for a cruise economic impact assessment, a cost benefit analysis for the development of Suva and Lautoka port facilities, updating Fiji's marine charts, and establishing a customs station in Lau (for yachting); and
- To ensure sustainability of tourism infrastructure, water supply and sewerage systems require upgrades.

Strategies

Strategy 9 – Increase Air Access to Fiji

Due to the high seasonality of Fiji's traditional visitor source markets, it is prudent that airlines ensure adequate capacity is available all year round.

Sub Strategies	Key considerations
<p>Continue to increase connectivity Fiji Airways will dovetail initiatives with Tourism Fiji to strategically grow direct flights to key markets using current, and possible new Air Services Agreement.</p>	<ul style="list-style-type: none"> • Efficient use of current Air Service Agreement and development of new Air Services Agreements for potential markets • Development of new routes either through direct or codeshare to key and emerging markets
<p>Maintain air link to South East Asia Hong Kong, South Korea, Singapore and Japan provide important access hubs for Fiji to grow the South and South East Asian markets and leverage access to other tourism markets in India, Malaysia and Indonesia.</p>	<ul style="list-style-type: none"> • Maintain and gradually increase number of visitors and flights from Hong Kong, South Korea, Singapore and Japan • Effective marketing efforts by Tourism Fiji and Fiji Airways to draw visitors from the South and South East Asian markets
<p>Encourage and facilitate market analysis on potential future destinations A market analysis will be undertaken to identify potential visitor source markets e.g. Dubai, Shanghai, Beijing, Mumbai, Canada etc.</p>	<ul style="list-style-type: none"> • MITT to work with Airline companies • Secure expertise to undertake market analysis • Use of market analysis report for evidence-based decisions on potential visitor source markets

Strategy 10 – Increase Capacity of Domestic Flights

The outer islands offer unique visitor experiences that add to the appeal of Fiji as a tourism destination. There are opportunities to increase capacity of domestic flights and provide more regular and affordable flight services to the outer islands on the back of demand from the tourism industry. In this regard, options should be explored to grow tourism on Vanua Levu, Taveuni and Kadavu, particularly during the high season.

Sub Strategies	Key considerations
<p>Improve flight connections and distribution to important tourism regions The Fijian Government to partner with domestic air carriers in order to:</p> <ul style="list-style-type: none"> • Review the commercial and economic viability of domestic air services • Assess demand for travel to Vanua Levu, Taveuni and Kadavu as identified regions that have potential for tourism development • Improve connection to international flight schedules to make travel to the outer islands seamless 	<ul style="list-style-type: none"> • Expert input • Cooperation between Government, FAL, Tourism Fiji, Fiji Airways and FHTA • Use domestic air services review reports for evidence-based decisions regarding domestic air services in Fiji • Increase flights to outer islands

Strategy 11 – Support Essential Airport Developments

Fiji's tourism industry is dependent on air connectivity to its source markets. This connectivity is reliant on the infrastructure at Fiji's two international airports, Nadi and Nausori. Continuous upgrades of these airports are required to ensure adequate capacity to increase flights.

Domestically, outer island airports have limited facilities and infrastructure that restrict the type and number of visiting aircrafts.

Sub Strategies	Key considerations
<p>Closer collaboration between Government and FAL The Fijian Government will work closely with FAL to continue modernising and upgrading international airports and its supporting infrastructure.</p>	<ul style="list-style-type: none"> • Completion of Nausori International Airport upgrade • Improvement of domestic flight connections to outer island destinations • Coordination amongst stakeholders • Tourism development in outer islands to drive market growth in the long term • Tourism development in Vanua Levu to drive market growth in the long term

Strategy 12 – Improve Port Facilities for Cruise Tourism

Fiji has an extensive network of wharves, jetties and marinas with the potential to upgrade and improve cruise and yachting tourism experience. Improvements in the facilities will activate interests from major international cruise line companies to include Fiji in their cruise itineraries. To better tap into the growing Pacific cruise market, Fiji needs to better understand the current and potential value of this segment.

Sub Strategies	Key considerations
<p>Conduct an economic impact assessment of the cruise industry in Fiji The economic impact assessment will assist in ascertaining the viability of a dedicated cruise ship terminal and the necessary investment required.</p>	<ul style="list-style-type: none"> • Secure experts with skills, knowledge and experience on cruise tourism, particularly in Fiji and the Pacific • Industry involvement and participations
<p>Closer collaboration between Government and relevant stakeholders Ensuring upgrade and maintenance of relevant marine infrastructure is carried out in coordination with stakeholders to facilitate cruise tourism development, ensure visitor safety and enhance cruise tourism experience.</p>	<ul style="list-style-type: none"> • Close collaboration with FPCL, MSAF, FPTL, FRA, development partners and relevant Government ministries • Review and provide essential support services to cruise ships • Industry involvement and support
<p>Undertake a review of all support services for cruise ships The review to take into consideration fuel standards, portable water supply and other essential support services to cruise ships in efforts to further improve services and continue to make Fiji a favoured port of call in the Pacific region.</p>	<ul style="list-style-type: none"> • Close collaboration with FPCL, MSAF, FPTL, FRA, development partners and relevant Government ministries • Review and provide essential support services to cruise ships • Industry involvement and support

Strategy 13 – Improve Expedition Standards for Yachting in Fiji

There is a significant opportunity to increase boating in Fiji through improved charts and navigation aids. Provision of infrastructure such as pump-outs and moorings will also make boating more appealing and safer in Fiji.

Sub Strategies	Key considerations
<p>Provide better services for yachting</p> <p>This includes:</p> <ul style="list-style-type: none"> • The Fiji Hydrographic Unit (FHU) to update navigational charts following the successful hydrographic mapping of high-use areas of Mamanucas, Yasawas and Kadavu. • Installation of moorings in high visitation areas. This will protect the environment and make yachting easier to designated areas. • Improve pump-out facilities for boats. • Supporting the facilitation of information guides (such as the annual Fiji Shores and Marina Guide) • Support the development of customs stations in locations such as Lau to enable yachts travelling into Fiji to spend time in the outer islands. • Review and consider a specialised visa of foreign boats such as yachts to increase the length of stay 	<ul style="list-style-type: none"> • Support from relevant agencies • Sufficient budget for upgrading services and ports • Updated and accurate navigational charts • Install navigational aids at critical locations • Coordination among stakeholders • Prioritisation of services and ports needed to grow the segment

Strategy 14 – Forward planning for Roads

FRA manages Fiji's road assets, bridges, wharves, and jetties. The tourism industry heavily relies on transport infrastructures for easy access to remote, rural areas and increasingly on port facilities and jetties for access to island destinations. With the growth of the Fijian tourism industry, it is important to ensure that new developments are integrated into FRA's plans.

Sub Strategies	Key considerations
<p>Ensure plans for transport infrastructure considers demand from the tourism sector</p> <p>A proactive approach to tourism planning and development must be undertaken in consultation with FRA and relevant stakeholders.</p>	<ul style="list-style-type: none"> • Regular dialogue and coordination among stakeholders, including Government, private sector and industry associations to maintain and improve infrastructure in key tourism areas

Strategy 15 – Forward Planning for Water Supply, Energy and Sewerage Systems

Quality Water, Energy and Sewerage systems are required to ensure customer satisfaction in the tourism sector. While EFL and the WAF are the responsible agencies, it is important for their plans to consider the tourism sector given tourism's importance to Fiji.

The issues identified need to be ironed out to ensure they does not constrain tourism development.

Sub Strategies	Key considerations
<p>Ensure future plans consider demand from the tourism sector</p> <p>Future water, energy and sewerage capacity development needs to support future tourism development needs. WAF and EFL must be kept up-to-date with the status of new tourism projects to allow for upgrades to existing capacity to cater for new developments.</p>	<ul style="list-style-type: none"> • Communication between MITT and Town and Country Planning to inform WAF and EFL of tourism development plans • Donor agency funding and technical support to assist medium and small-scale operators with energy efficiency projects.
<p>Identify options for improving water supply in outer islands</p> <p>WAF to provide island resorts with advice and technical expertise on increasing their water supply and reliability. Donor funding may be required for outer islands to implement projects.</p>	<ul style="list-style-type: none"> • Identify a donor agency to assist in improving island water supply and technical assistance.
<p>Develop a plan to improve the sewerage systems</p> <p>A plan needs to be developed to improve the sewerage systems.</p>	<ul style="list-style-type: none"> • Secure technical experts to develop plan • Access to donor agency funding and technical assistance to improve sewerage treatment systems

Area 5 Strengthening Linkages to the Tourism Industry

Due to the nature of the tourism industry, one of the best ways to enhance and retain the benefits of tourism is to strengthen the linkages between formal tourism sectors and the local economy.

Employment Linkage to Tourism

Tourism industry is largely labour intensive and is among the top-job creating sectors because of its significant multiplier effect on employment in other related sectors. Tourism employment in Fiji's accommodation sector alone increased from 11,792 direct jobs in 2011 to 13,878 in 2017. An estimated 80% of these jobs are full time employment while 20% are part time¹³.

Tourism related employment is estimated to be significantly higher when factoring in linkages to sectors such as transportation, food service, construction, retail trade and agriculture. The WTTC's 2017 estimate of the total contribution of travel and tourism to employment in Fiji represented 118,500 jobs. This represents over 36.5% of total employment.

Word Cloud 1. Favourable Impressions of Fiji, 2017 International Visitor Survey



(Source: 2017 International Visitor Survey)

The tourism industry workforce comprises a very important element of the overall visitor experience in Fiji. To maintain this position, the workforce will need to adapt to meet the needs of emerging markets. Growth is expected from Asia markets, particularly from India and China. Currently, there are limited Chinese and other Asian language skills amongst the workforce. This affects not only frontline staff, but also every touch point in the visitor experience including menus, websites, signs and other information.

Agriculture Linkage to Tourism

A challenge for countries is to ensure that tourism growth is sustainable and benefits are maximised and distributed as much as possible. Efforts to maximise the economic benefits of tourism have largely focused on increasing the tourist arrivals, increasing the average length of stay, and increasing the overall expenditure of tourists. However, to enhance economic and host community benefits while addressing the broader issues of sustainability, it is important to continuously strengthen linkages between the tourism and agriculture sectors.

Linkages need to be initiated from a national level by working together with the Ministry of Agriculture in the implementation of FT 2021. MITT will align agriculture projects to the Fiji 2020 Agriculture Sector Policy Agenda which seeks to move the economy forward by addressing new domestic and global challenges. In addition, the establishment of a new Fijian Organic brand, under the Fijian Made – Buy Fijian Campaign, will contribute to positive economic benefits for local communities. Together, these initiatives will create a more holistic approach to sustainable tourism resulting in a variety of positive outcomes, including a reduction in “product miles” and other wastes; more attractive and viable rural areas; more vibrant and locally distinctive tourism products; potential development of gastronomy as a niche product in the Fijian tourism industry; and greater economic and social well-being for communities.

Fijian Made – Buy Fijian Campaign Linkage to Tourism

The Fijian Made – Buy Fijian Campaign is a Fijian Government initiative established in 2011 to encourage greater consumption of authentic Fijian products in both domestic and international markets. Promoting the ‘Fijian Made’ brand has created new demand for Fijian products, which in turn has stimulated production by local suppliers, assisting in local employment creation and reducing Fiji's import bill. In addition, the Campaign has contributed to the positioning of Fijian products in key international markets and strengthened the export sector. The main tourism industry linkages to the Campaign is through the Fijian Made, Fijian Crafted, Fijian Grown and Fijian Organic brands.

¹³ Fiji Bureau of Statistics



Findings

FT 2021 has identified the following constraints which need to be addressed to maximise the linkages from tourism:

- Employment of Fijians in the tourism industry is often limited to middle-management level in many large-scale multinational tourism operations;
- Language and cultural training is needed to prepare for new and emerging markets; and
- Domestic agriculture has the potential to increase supply to the tourism industry. There is a need to improve consistency, quality, quantity and utilisation of local produce in the tourism industry.

Strategies

Strategy 16 - Linking Human Resources to the tourism industry

While service oriented jobs are the back bone of the tourism industry, it is important that Fijians have the opportunity to progress into managerial and executive roles.

A critical component of human resource capacity building is vocational training for the tourism sector. The industry increasingly needs a steady supply of skilled workers in areas such as Food and Beverage and other essential services. It is already known that language and cultural trainings are needed to develop Fiji's human resources to allow the destination to effectively cater for visitors from new and emerging markets.

Details	Key considerations
<p>Conduct a tourism industry human resource needs assessment Conduct a human resource needs assessment to find out the skills in the tourism industry, in order to ascertain existing skill bases and required training programmes.</p>	<ul style="list-style-type: none"> • Collaboration between MITT, Tourism Fiji, educational institutions such as USP and FNU to identify skill shortages and introduce new courses to mitigate these gaps • Collaboration between MITT and the industry • Industry support through provision of human resource information • Institution support through research work • Funding and technical assistance from partners and donors
<p>Encourage career development and capacity building of Fijians in the industry Incentivising tourism operators to encourage up-skilling and career development of Fijians in the industry with the aim of encouraging mentoring programmes where locals understudy expatriates for career progression.</p>	<ul style="list-style-type: none"> • Collaboration between Ministry of Employment and Industrial Relations, FRCS, MITT, FHEC, TELS and tourism educational institutions • Understanding of private sector human resource needs and gaps • Use information from human resource needs assessment for informed decision making
<p>Utilisation of Cooperation Agreements MITT will utilise MOU's and bilateral agreements available to assist the tourism industry target new and emerging markets, for instance language and cultural trainings.</p>	<ul style="list-style-type: none"> • Effective implementation of agreements

Strategy 17 – Linking agriculture and aquaculture industries to the tourism industry

Linking the local agriculture and aquaculture sectors to tourism is an effective way of making the tourism sector more economically inclusive and viable in the long term.

The growth in the importation of agricultural and aquaculture products by hotels and resorts is partially due to the current inability of the agriculture sector to provide adequate produce. Quality fresh produce and raw meat attract premium prices in hotels and resorts. The nature of the tourism industry requires consistent and high-quality agricultural produce. This drives the need for importation as local farmers often do not meet the tourism industry's quality and quantity demands. The high level of importation is placing significant pressures on Fiji's balance of payments.

Details	Key considerations
<p>Develop a recognition and rewards scheme for service providers Facilitate initiatives to develop a recognition and rewards systems for service providers making efforts to promote the use of local produce in their operations.</p>	<ul style="list-style-type: none"> Industry consultations on appropriate schemes
<p>Continuation of Government assistance to farmers Capacity building programmes need to be prioritised by the Ministry of Agriculture to up skill farmers and nurture innovative and smarter agricultural practices.</p>	<ul style="list-style-type: none"> Agricultural suppliers understanding of the specific market potential and requirements of the tourism industry Availability of local produce that meets industry needs Partnerships between farmers and tourism operators
<p>Improve synergy between stakeholders Strengthening linkages between Government, agriculture, aquaculture and the tourism sector that will enable the creation of commercial value chains and ensuring consistent supply to meet tourism industry demands. Workshops on a technical level between the Government, farmers and the Tourism industry to be conducted on a need basis and annual forums to act as a platform for continued collaboration between the stakeholders.</p>	<ul style="list-style-type: none"> Cooperation between Ministry of Agriculture, FHTA, MITT and Farmers associations Better understanding of the needs and requirements of the tourism industry and the demands for fresh local produce Improved understanding of the best practices of peer destinations in their agricultural linkages to the tourism industry
<p>Promotion of Fijian Grown and Fijian Organic Continue encouraging local consumption through the Fijian Made-Buy Fijian Campaign</p>	<ul style="list-style-type: none"> Promotion of Fijian Grown and Fijian Organic produce in the tourism industry Understanding of demand for organic produce within the tourism industry Quality assurance of produce



Area 6 Ensuring Continued Sustainable Development of the Tourism Industry

Tourism is an important sector for many countries and a key pillar of Fiji's socio-economic development. According to UNWTO, in 2016 more than 1.2 billion people engaged in international travel for the purpose of tourism, and a further 6 billion people engaged in domestic tourism. The growing global tourism demand has already strained ecosystems and environments in more developed destinations and is starting to impact Fiji. The need for responsible management policy and practices is imperative since tourism is a multi-stakeholder activity that involves a special relationship between visitors, industry, local communities, environment and government.

As Fiji's popularity increases, the capacity to sustain and manage tourism growth needs to be established. Ensuring the Fijian tourism product is economically, socially, ecologically and culturally sustainable is necessary to safeguard the sector's long-term viability. Placing sustainability at the centre of Fiji's tourism sector development is vital for the conservation and preservation of Fiji's natural and cultural heritage. Furthermore, positioning Fiji as a sustainable destination aligns with the global trend for ethical travel, where visitors seek meaningful engagement with the destination and desire socially responsible tourism activities.

2017 International Year of Sustainable Tourism for Development

Tourism is increasingly being recognised as an industry that can eliminate the boundaries between countries, cultures and continents and usher in a better world. As a testament to the role of tourism as a mediator for global peace and prosperity, the United Nations (UN) General Assembly declared 2017 as the International Year of Sustainable Tourism for Development. The declaration is an extension of the recognition accorded to tourism in the 2030 Agenda on Sustainable Development, as endorsed by the UN General Assembly in 2015. The purpose of the declaration is to engage all tourism stakeholders to effect change in national policy, business practices and consumer behaviour to advance the cause of sustainable development in five key areas:

1. Inclusive and sustainable economic growth;
2. Social inclusiveness, employment and poverty reduction;
3. Resource efficiency, environmental protection and climate change;
4. Cultural values, diversity and heritage; and
5. Mutual understanding, peace and security.

Sustainability as a Priority for Fiji

Sustainability underpins the development agenda of the Fijian Government, as evident in its commitment to the Sustainable Development Goals, Fiji's chairmanship of the 23rd Conference of the Parties (COP 23) to the UN Convention on Climate Change (UNFCCC), the 2017 International Year of Sustainable Tourism for Development and Fiji's cornerstone strategy, the Green Growth Framework. As a key sector of the economy, the Fijian Government recognises the need to mainstream sustainability throughout the tourism industry.

The Fijian Government has endorsed various legislation, including the Environment Management Act (EMA) 2005, the Fiji 2020 Agriculture Sector Policy Agenda, and the National Climate Change Policy, that serve to guide the tourism industry towards inclusive sustainable development.

The Government recognises that sustainable tourism practices are not only beneficial for the protection of the Fijian tourism product and the conservation of Fiji's ecosystems and environment, but also enhance the visitor experience, improves the quality of service delivery and can contribute to the prosperity of local communities as partners in development.

Environmental Protection in Fiji

The natural environment is an integral element of the Fijian tourism product and gives Fiji a distinct competitive advantage. In order to preserve the environment and minimise the negative ecological impacts from tourism, it is imperative for the Government and stakeholders to collaborate on quality tourism development within the limits of acceptable change to the ecological, social and cultural environments.

The role of Government in implementing policies and regulations to control the negative impact of tourism on the natural environment is essential to provide a minimum standard for industry development and environmental performance.

Environment Management Act 2005



The Fijian Government established the EMA 2005 to support sustainable resource management and encourage environmental conservation. The Act established policies and guidelines for Environmental Impact Assessments (EIA), waste management, pollution control and penalties.

In the context of tourism development, the implementation of the Act through the Department of Environment includes:

- Control and monitoring of pollution, waste management, abatement and reduction;
- Implementation and enforcement of the EIA process;
- Setting, enforcing and overlooking environmental standards; and
- Sustainable management planning and maintenance of natural resources.

Environmental Impact Assessments

The EIA component of the Act is essential for sustainable tourism development. Since 1989, it is mandatory for all tourism accommodation projects to include an EIA report for construction approval by the Department of Town and Country Planning. The EIA report must be authorised by an accredited consultant and submitted to the EIA Unit within the Department of Environment for assessment and approval of the project.

Environment and Climate Adaptation Levy

The Fijian Government introduced an Environmental Levy Act 2015 and subsequently the Environmental Levy (Budget Amendment) Act 2017 for the tourism industry. It serves to reinforce the commitment of Government to protect the environment for the well-being of all Fijians. A levy is imposed on prescribed services offered to visitors, including accommodation and recreational activities, and the funds collected are to be utilised for environmental initiatives. The payable levy rate of 10% is calculated by applying the tax rate to the fee for the prescribed service (exclusive of Value Added Tax and Service Turnover Tax).

Tourism Agenda in the Green Growth Framework

The Green Growth Framework (GGF) is a tool to progress integrated and inclusive sustainable development that will inspire action at all levels to strengthen environmental resilience, drive social improvement, reduce poverty, enhance economic growth, and build capacity to withstand and manage the effects of climate change. The 4 key tourism-related challenges identified in the Framework are:

- Promoting sustainable use of water resources;
- Strengthening conservation of biodiversity for sustainable tourism;
- Promoting energy efficiency; and
- Enhancing waste management in tourism.

Marine Conservation in Fiji



The marine ecosystem is an integral component of the Fijian way of life and is estimated to yield at least \$2.5 billion per annum¹⁴. This comes from tourism, commercial and subsistence fishing activities, coastal protection and carbon-storage values. The livelihood of many Fijian communities is heavily dependent on the marine eco-system.

Although tourism development is not the only contributor to the deteriorating condition of Fiji's marine environment, the impact of tourism cannot be refuted. Incorporation of the GGF and the Oceans Policy Framework into the plans of the tourism sector is therefore of high importance to conserve Fiji's marine environment.

Marine Protected Areas

At the 2005 Small Island Developing States (SIDS) Conference in Mauritius, Fiji made a commitment to designate 30% of its ocean as Marine Protected Areas (MPAs) by 2020. This commitment was affirmed in 2014 at the SIDS Conference in Samoa. Since then Government, NGOs and communities have worked together to identify and prioritise marine areas that need protection and effective management.

¹⁴ Republic of Fiji Ocean Policy Framework (2017)

Fiji Locally Managed Marine Area Network

The FLMMA network was established in 2001 as a non-profit and charitable association composed of Government, NGOs, academic institutions and over 400 communities. Together, the members work to promote the preservation and sustainable use of community-managed marine resources in Fiji. Villages affiliated with the network have designated protected areas within their traditional fishing grounds and established guidelines to manage the areas, including regulations and restrictions on fishing activities.



Cultural Conservation in Fiji

Fiji is blessed as a multi-cultural country that prove to be an attractive combination for visitors. The indigenous cultures of Fiji also vary between villages and provinces, serving as a positive selling point for host communities. Currently, cultural tourism activities include village visits, traditional dances, singing and other performances, arts and crafts, practical demonstration of traditional skills such as weaving, tapa printing and similar Fijian experiences.

As societies evolve under the influence of modernisation, cultural heritage can often be lost. Tourism can be an effective tool to celebrate and conserve Fijian cultural heritage for future generations. For example, the older generation can teach the younger generation about traditional cuisines, performing arts, craft making and similar skills that can be promoted in the tourism industry. Likewise, the documentation of oral history and cultural traditions

can preserve knowledge and assets through the generations. These efforts not only support cultural conservation but also allow for the tourism industry and communities to create tourism products that offer an authentic Fijian narrative and experience. However, leveraging Fiji's cultural assets should be accompanied with proper management. Close collaboration with the Fiji Department of Heritage and Arts and the Fiji Arts Council is encouraged.

National Cultural Policy

A National Cultural Policy has been formulated by the Department of Heritage and Arts to stream-line all culture-related legislation, strategies and activities. This includes cultural enhancement procedures for traditional learning, capacity building for resource persons and local custodians, and promoting cultural tourism to enhance livelihoods, particularly in rural areas.

Traditional Knowledge and Expressions of Culture

The Ministry of iTaukei Affairs is developing a Traditional Knowledge and Expressions of Culture (TK&EC) Policy. Although there is an existing intellectual property regime in Fiji, it does not cover traditional knowledge, which cannot be copyrighted or trademarked. This will be a relevant policy for the tourism industry when completed.

Findings

FT 2021 has identified the following key areas that require improvements to ensure sustainable tourism development:

- Environmental compliance needs enforcement. A monitoring system to follow-up on conditioned approvals on developments based on an EIA is required;
- Although FLMMA is a successful venture, it is based on voluntary agreements; and
- The unique indigenous culture of Fiji is threatened by commoditisation in the absence of clear guidelines towards cultural conservation, engagement with communities and appropriate use of traditional knowledge.

Strategies

Strategy 18 – Sustainable Tourism Development Framework

The role of Government and all stakeholders is to ensure tourism development is pursued within a sustainable framework to mitigate and prevent the negative impact of tourism on the ecology, society and culture of Fiji. In the broader policy objectives of Government, the Green Growth Framework 2015 was established to serve as a sustainable development guide for all sectors in the Fijian economy. To support the GGF and act as a practical sustainable tourism management tool for all tourism industry stakeholders, a Sustainable Tourism Development Framework will be formulated.

Sub Strategies	Key considerations
<p>Formulate a Sustainable Tourism Development Framework</p> <p>MITT will engage partners to carry out a study of Fiji's current legislative framework and practices with regards to sustainable tourism, the outcomes of the study will guide Fiji's response to the formulation of a Sustainable Tourism Development Framework.</p>	<ul style="list-style-type: none"> • Scoping study to report with clear recommendations and expected outcomes to formulate and implement a Sustainable Tourism Development Framework • Consultations with public sector, private sector stakeholders and civil society • Ability to mainstream sustainability issues and actions into existing Government plans and frameworks. • Continued promotion of sustainability within Government and private sector • Alignment to the Green Growth Framework

Strategy 19 – Increase Environmental Compliance

The essence of environmental protection is to safeguard the sources of life – land, air, water and the ecosystem. These natural resources are the foundation of economic activity and essential elements of Fiji's tourism industry. Environmental compliance policies and programmes that protect the ecosystem create value for society through the monitoring of environmental impacts, increasing investor confidence, strengthening rule of law, supporting the well-being of the community, and protecting the quality of the tourism product.

The Fijian Government, through the Department of Environment, will implement policies and regulations to control the negative impact of tourism and raise the standard of Fiji's environmental performance.

Sub Strategies	Key considerations
<p>Strengthen enforcement of the Environmental Management Act (EMA) and the Environmental Impact Assessment (EIA)</p> <p>This sub strategy calls for increased efficiency and efficacy within the Department of Environment.</p>	<ul style="list-style-type: none"> • Sufficient number of qualified and accredited officers to carry out tourism related EIAs • Understanding of best practices for tourism EIAs, particularly for coastal and marine developments • Ongoing partnership with Department of Environment • Efficient processing of EIAs

Strategy 20 – Protection of reef, marine and coastal areas

A significant component of the Fijian tourism product is dependent upon marine and coastal environments. These are particularly susceptible to damage and destruction from unrestrained tourism activity. Effective management is essential to protect and conserve these resources.

To safeguard these essential resources, the Ministry of Fisheries has established more than 110 Marine Protected Areas (MPAs). Likewise, Government implemented the Green Growth Framework in 2015 to legislate water resource management and the conservation of biodiversity. Formalising Government commitment to marine and coastal area protection through a policy is a key step to ensuring these resources continue to be available for communities and the tourism industry.

Sub Strategies	Key considerations
<p>Encourage sustainable practises and alignment with marine conservation</p> <p>Extra protections for the marine environment will be encouraged. These will consider ways to minimise tourism's impact on maritime sites, for instance buoy moorings at popular dive sites. In addition, projects to establish National Marine Protected Parks have been discussed as potential landmark projects.</p>	<ul style="list-style-type: none"> • Collaboration between the Department of Fisheries, Mamanuca Environment Society, Department of Environment, FHTA and other stakeholders • Enforcement of a Marine Protected Area and Local Area Advisory Plan

Strategy 21 - Promote climate resilient infrastructure and energy efficiency

Fiji launched a National Climate Change Policy in 2012 to guide sector efforts in following an effective and integrated approach to address climate change. The key focus areas of the policy include environmental protection, utilisation of natural resources and sustainable management, strengthening institutional capacities for environmental management and strengthening food security. The relevant sectors are encouraged to adopt climate change mitigation initiatives to contribute to the global effort to reduce greenhouse gas emissions, including investment in climate resilient infrastructure and practicing energy efficiency as a business best practice.

Sub Strategies	Key considerations
<p>Enforce building codes that promote climate resilient infrastructure Building codes for infrastructure development must be complied with to ensure materials and techniques used consider climate change effects to improve durability and lifetime of developments.</p>	<ul style="list-style-type: none"> • Prioritisation of climate resilient infrastructure within Government • Ability to mainstream sustainability into plans, frameworks and legislation that impacts tourism • Review of current building codes • Tourism industry support for adoption of sustainable technologies
<p>Promote renewable energy utilisation in the tourism industry Subsidies and rebates could be considered for tourism businesses to purchase renewable energy and energy efficient equipment to encourage green tourism.</p>	<ul style="list-style-type: none"> • Understanding of best practices, existing and upcoming technologies for energy efficiency and renewable energy production • Leveraging partnerships with existing programmes, organisations and companies working in the renewable energy space • Working with FRCS to design a conducive policy to promote green tourism • Ability to mainstream sustainability into plans and legislation that impact tourism • Alignment to the Green Growth Framework

Strategy 22 – Protect Fiji’s unique cultural identity

FT 2021 recognises and respects the socio-cultural aspect of tourism and outlines how it can be leveraged for a more sustainable approach to tourism. Government, through the Department of Heritage and Arts, is in the process of creating a National Cultural Policy to formalise all culture-related legislation, strategies and activities to better regulate and monitor cultural tourism in Fiji. Expediting the finalisation and launch of the National Cultural Policy and Traditional Knowledge and Expressions of Culture Policy is critical to serve as a guideline for the cultural component of Fiji’s tourism industry.

Sub Strategies	Key considerations
<p>Collaboration with key stakeholders Strengthening collaboration and dialogue with key Government and industry partners to protect our cultural and traditional knowledge</p>	<ul style="list-style-type: none"> • Collaboration between Department of Heritage and Arts, Ministry of iTaukei Affairs and MITT

Area 7 Building a Conducive and Updated Legal Framework for the Tourism Industry

Tourism laws provide the necessary regulatory framework for sustainable tourism activity, protection of natural and cultural resources, and the facilitation of fair engagement by all stakeholders in tourism development.

The formulation of an overarching tourism legal framework will provide a clear guide to stakeholders on the legal requirements of tourism development and ensure compliance to national standards and targets for sustainable tourism development.

The Tourism Industry Act will outline all related tourism legislation and ensure consistency with overall national tourism objectives. The Act is envisaged to be coherent, business and investor friendly, and able to provide proper and streamlined guidance for tourism development. At the same time, the Act will empower both Government and the industry to achieve value from the Tourism sector. Transparency, good governance and efficiency are key fundamental outcomes the Act will champion within the tourism industry.

Findings

FT 2021 has identified the following key areas to ensure sustainable tourism development:

- An overarching legal framework for the tourism industry is needed to ensure cohesive and strategic development of the industry.

Strategies

Strategy 23 – Formulation of a Tourism Industry Act

The development of a Tourism Industry Act will be inclusive, practical and robust. It will be inclusive by reflecting the roles and responsibilities of all stakeholders; practical by addressing pertinent issues surrounding the tourism industry and robust to enable the protection and enhancement of sustainable tourism development within Fiji's set standards.

A systematic approach will be applied in developing, implementing and enforcing the Tourism Industry Act. Being systematic will ensure:

- The proposed Act is consistent with National Development Priorities;
- Existing legal regulations governing the development of tourism are reviewed in order to better identify and address core legal and enforcement issues;
- Awareness among the industry on the standards and compliance issues; and
- The agency responsible for tourism is well equipped to perform its roles and responsibilities.

The Ministry will provide the necessary assistance to tourism operators in order to achieve full compliance with the legal framework.

Sub Strategies	Key considerations
<p>Draft a Tourism Industry Act The Act will guide the tourism industry and empower the Government to develop, implement and enforce standards in the tourism industry.</p>	<ul style="list-style-type: none"> • Effective research and understanding of best practices • In depth consultations with industry and all stakeholders • Timely advice of legislative changes to the tourism industry • Allow sufficient transition period for the tourism industry to become compliant • Ensuring the Sustainable Tourism Development Framework reflects the new Tourism Industry Act • Cabinet approval
<p>Ensure compliance to legal requirements and standards Provide assistance and guidance to tourism operators to comply with legal requirements and standards</p>	<ul style="list-style-type: none"> • Sufficient budget and monitoring system for implementation • Providing compliance assistance to licensed operations • Institutional capacity for enforcement of the legislation

Area 8 Enhancing Risk Management within the Tourism Industry

As an industry, tourism is vulnerable to crisis situations that could have negative impacts on visitor arrivals. Fiji takes its responsibility for the safety and well-being of its guests and industry staff very seriously.

In addition to managing events that affect the industry at the national level, effective management of an individual crisis that involve international visitors is critical. Government agencies and tourism organisations need to be well coordinated to promptly and accurately communicate with Foreign Missions and international visitors during such events.

Risk identification will provide vital information that will assist decision-making during a crisis situation by evaluating the probabilities, time-frames and potential impacts of each risk and then prioritising them. Proper risk identification enables mitigation measures to be in place before a crisis situation is realised. The Ministry will endeavour to assist tourism operators to incorporate the findings from a risk audit into their own risk management plans.

This will be supported by a Tourism Crisis Communication Framework. It is essential that there is a seamless channel of communication to internal and external parties in order to maintain the integrity of Fiji's brand perception as a safe tourism destination for our international visitors.

While it is difficult to anticipate all risks that can affect Fiji's tourism industry, Government is cognisant of the UNWTO and other international best practices. A comprehensive risk audit will need to be undertaken and tailored to the requirements of Fiji's tourism stakeholders.

National Disaster Management Office

The threat of natural disasters is an area that requires specific prioritisation and planning. The National Disaster Management Office (NDMO) is the lead government agency in this area. The role of the NDMO is to carry out policies with regard to disaster preparedness, mitigation, prevention, emergency operations, and relief and rehabilitation of the affected areas in Fiji. Beside NDMO's efforts, it is recognised that Fiji's tourism industry has special needs in the management of disasters, mainly due to the following factors:

- Larger resorts are located in vulnerable (coastal) areas of western Viti Levu such as Nadi, Denarau and the Coral Coast;
- The industry has a collective responsibility for the safety and welfare of international visitors; and
- There is a need for Government agencies to communicate information on the safety and security of visitors to accommodation and service providers.

Tourism Crisis Communication Framework

Crisis communications strategies are needed to help retain the confidence of international visitors in the tourism industry and minimise the impact of a crisis on Fiji as a tourist destination. The Tourism Crisis Communications (TCC) Framework is being prepared to serve as a guide for practical advice in organising emergency communication and coordinating response.

The TCC Framework will set out how the public and private sector will inform stakeholders on risks, how they will respond in the event of a crisis and how they will keep the status of recovery efforts publicly known. The TCC Framework will continue to be reviewed in response to changing technologies and emergency situations.

Tourism Response Team

Following the tropical depression affecting Fiji in January 2012, the Tourism Response Team (TRT) was formed. The task force has been an exceptional example of what Government and industry partnership can achieve in the event of a crisis. The purpose of the TRT is to exchange accurate and timely information and provide support to the industry where possible for the safety and security of all guests and industry staff.

When the TRT is mobilised in the event of a crisis, its first responsibility is to ensure information is obtained from the NDMO and communicated to the tourism industry. The status of the tourism industry is also communicated to NDMO following feedback from tourism stakeholders

Requests for industry specific information from the NDMO is also collated by the TRT. This includes property damages, staff and visitor safety, utilities and services outages, and guest occupancy. This information is also vital in assessing the economic impact of natural disasters and other crisis events to Fiji's tourism industry.

Findings

FT 2021 has identified the following areas as priority to ensure proper risk management:

- Given the importance of safety and security requirements for the tourism industry, there is a need to document and understand Fiji's potential risks through a risk audit;
- Close cooperation and communication must exist between Government and the relevant agencies in order to effectively manage situations before, during and after any crisis situations; and
- TRT should be reviewed with the objective of making improvements to the current initiatives in order to deliver a more proactive approach to crisis management.

Strategies

Strategy 24 – Identifying risks associated with the tourism industry

Risk management should be viewed as a proactive preparation for any crisis, to help prevent the realisation and severity of adverse happenings. Risks are dynamic and their likelihood and consequences can change unexpectedly. Thus, risk registers should be treated as 'living' documents and reviewed regularly.

A comprehensive list of all major potential risks associated with Fiji's tourism industry will be identified and profiled to develop mitigation measures. This will be done through a comprehensive risk audit involving tourism stakeholders and Government. The objective of this strategy is to bring to the forefront all risks associated with the tourism industry and ensuring its incorporation to crisis management structures.

Sub Strategies	Key considerations
<p>Risk profiling and appropriate mitigation measures A risk audit to identify and profile all major potential risks associated with Fiji's tourism industry in consultation with key stakeholders.</p>	<ul style="list-style-type: none"> • Research and profiling of all major potential risks associated with Fiji's tourism industry • Identifying key elements to be part of the Tourism Crisis Communication Framework • Effective collaboration between stakeholders to conduct the risk audit

Strategy 25 - Tourism Crisis Communication Framework

The objective of this is to institutionalise the framework to ensure the safety and well-being of visitors and the tourism workforce during a crisis.

Sub Strategies	Key considerations
<p>Draft Tourism Crisis Communication Framework (TCC Framework) MITT to develop guidelines in consultation with relevant stakeholders in line with international best practices.</p>	<ul style="list-style-type: none"> • Incorporate findings of the Risk Audit • Stakeholder consultation and collaboration • Alignment to NDMO risk management plans • Incorporation of the Tourism Response Team • Cabinet endorsement of TCC Framework
<p>Implement the Tourism Crisis Communications Framework This sub strategy requires a systematic approach in the implementation and regular review of the TCC Framework.</p>	<ul style="list-style-type: none"> • Raise awareness of the TCC Framework • Tourism industry buy-in
<p>Institutionalise the Tourism Response Team (TRT) and strengthen collaboration with industry TRT will be reviewed by MITT. Membership and responsibilities of the TRT will be provided for in the TCC Framework.</p>	<ul style="list-style-type: none"> • Review the current TRT arrangement as per TCC Framework • Effective collaboration with key partners e.g. NDMO, diplomatic missions, tourism associations, public utility bodies, tourist police etc. • MITT to establish primary emergency contacts at these agencies and a system to maintain updated emergency contact listings

Area 9 Measuring the Performance of Fiji's Tourism Industry

The future of the Fijian tourism industry will be based on detailed knowledge of tourism markets. Good data on visitor profiles, activities, motivators, regions visited, length of stay, origins and spending patterns can help with the successful development, marketing, and overall sustainability of Fiji as a destination. Quality information on tourism can form the basis of sound policy decisions and informed business development. Strategic planning and performance measurement, including of FT 2021's implementation, of the tourism industry depends on the availability of high-quality data.

Tourism Data Collection

Currently, tourist data collection is being done in isolation. Current primary data collections include:

- Market research collected by Tourism Fiji;
- Operators database collected by Tourism Fiji;
- Overseas Arrivals and Departures Data (OAD) collected by Department of Immigration;
- International Visitor Survey (Air and Cruise) collected by the Ministry;
- Hotels and Other Tourist Accommodation Survey collected by the Fiji Bureau of Statistics (includes employment and hotel receipts data);
- Airline passenger load data collected by Air Terminal Services; and
- Service Turnover Tax and Environment Climate Adaptation Levy collected by FRCS.

Analysis of this data is undertaken by the Ministry, Tourism Fiji and FBOS.

Instead, Fiji needs specialist knowledge and skills such as market data collection, statistical analysis and forecasting. There is a need for greater coordination so as to provide more reliable data for effective policy formulation, marketing and planning in the tourism sector.

Tourism Satellite Account

A Satellite Account is a term developed by the UN to measure the size of economic sectors that are not classified as a separate industry in the national accounts. Tourism is an amalgam of industries such as transportation, accommodation, food and beverage services, recreation and entertainment and travel agencies.

Fiji's Tourism Satellite Account (TSA) increases and improves the country's knowledge of the importance of tourism relative to overall economic activity. It can be used as an instrument for designing more efficient policies relating to tourism and its employment aspects. It also helps create awareness among stakeholders, directly and indirectly involved with tourism, of the economic importance of tourism and its role in all industries involved in the production of goods and services demanded by visitors.

TSA allows measurement of the following:

- tourism's contribution to GDP;
- tourism's ranking compared to other economic sectors;
- number of jobs created by tourism in an economy;
- investment in the tourism sector;
- tax revenues generated by tourism industries;
- tourism consumption;
- tourism's impact on a national balance of payments; and
- characteristics of tourism human resources.

International Visitor Survey

Fiji's IVS involves both quantitative and qualitative research. The purpose of this survey is to provide Government and tourism stakeholders with regular, comprehensive and accurate information on the characteristics, behaviour and expenditure of visitors to Fiji.

These indicators provide crucial information to Government, Tourism Fiji and the tourism industry in order to ascertain tourist preferences and experiences overtime and how the industry should be positioned to be able to better meet these changes in the long run.

Market research

It is important to understand awareness of the Fiji brand, travel motivations, intentions and barriers to travel. More and better research is required for comprehensive knowledge of Fiji's product offering; relevant policy choices and the actions of competitor destinations.

Hotel Data Collection System

The Hotel Data Collection System (HDCS) aims to provide Government and stakeholders with up-to-date tourism occupancy data in a manner that is more accurate, faster and more reliable than current methods. Information extracted from the HDCS will help enhance planning and assessment processes while improving decision making for marketing. Moreover, more accurate room inventory data from the HDCS will help determine national development priorities to better maximise returns that will benefit Fijians.

Findings

Understanding the tourism industry requires active monitoring that is essential for continued development. FT 2021 has identified the following areas of data collection which require improvements:

- TSA is currently produced in sporadic intervals and based on estimates from previous TSAs;
- IVS need to be modernised and in-house capacity built to allow analysis and extraction of real time data;
- Fiji's existing and emerging markets are highly segmented and require in depth research to identify better marketing strategies; and
- Hotel data collection needs to be robust and digitised.

Strategies

Strategy 26 – Measuring Economic Impact of Tourism

Due to its significant importance, Fiji's TSA needs to be produced more regularly.

Sub Strategies	Key considerations
<p>Facilitate the publication of TSA reports every two years</p> <p>The TSA is an important document which needs to be produced on a 2-year interval to accurately ascertain the economic flows throughout the industry, allow informed policy decisions, and target areas in need of stimulus.</p>	<ul style="list-style-type: none"> • Effective collaboration between Government, Tourism Fiji, Reserve Bank of Fiji, Fiji Bureau of Statistics and relevant stakeholders • Technical assistance to Fiji's TSA programme • Research information rather than reliance on estimates

Strategy 27 – Establishing Robust Data Collection Methods

The IVS and HDCS will provide vital information on visitor characteristics therefore improving the current systems will ensure data is provided on a regular and timely basis.

Sub Strategies	Key considerations
<p>Complete modernisation of the International Visitor Survey</p> <p>Modernisation of both components of the IVS (air and cruise).</p>	<ul style="list-style-type: none"> • Conducting a diagnostic review to determine key issues and create an improvement plan • Production of IVS reports on a timely basis
<p>Capacity building for in-house reporting of the International Visitor Survey</p> <p>The Ministry to build in-house capacity to ensure staff are trained to analyse IVS data and provide quarterly reports for policy and business decision making.</p>	<ul style="list-style-type: none"> • Continuous capacity building for MITT Tourism Research team • Production of quarterly IVS Reports and all IVS data requests
<p>Establish the Hotel Data Collection System</p> <p>MITT will develop the HDCS and mandate implementation for all tourism accommodation properties.</p>	<ul style="list-style-type: none"> • Established HDCS • Passing of relevant legislation • Streamlined reporting system

Strategy 28 – Improving Market Research and Intelligence

As Fiji embarks on its tourism growth path towards 2021, it will need further insight into its key and emerging source markets to help diversify and increase value.

Sub Strategies	Key considerations
<p>Conduct segmentation research on Fiji's established and emerging source markets</p> <p>The research will provide valuable insights into Fiji's emerging markets and enable priorities to be set for growing value from these markets.</p>	<ul style="list-style-type: none"> • Effective use of market profiles to design marketing strategies • Regular review and update of market profiles
<p>Research on competing destinations for Fiji</p> <p>In depth analysis of Fiji's competing destinations</p>	<ul style="list-style-type: none"> • Effective use of market research to review policy, business and marketing decisions.

4 Implementation Framework

Time Frame for Implementation

The Fijian Government has aligned the implementation of this plan with 5-Year and 20-Year National Development Plan and other relevant Government initiatives and programmes. Government will also ensure that tourism programmes supported by development partners are well aligned with this plan to ensure coherence with overall vision of the tourism industry.

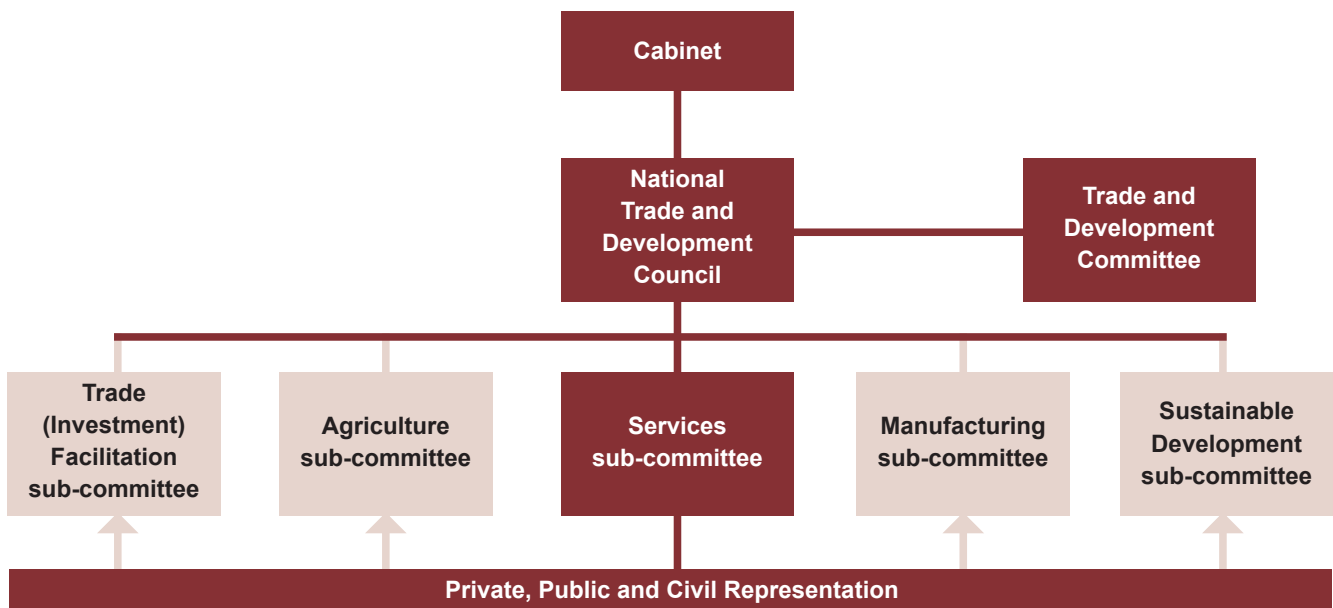
Institutional Arrangements

MITT, which is the principal arm of Government with the mandate for tourism management and development, will be the lead agency responsible for the implementation of the plan. Where necessary, MITT will collaborate with other institutions responsible for other aspects of the plan.

The main institutional framework to implement FT 2021 will be the National Trade and Development Council (NTDC) chaired by the Minister for Industry, Trade and Tourism. As per the Fijian Trade Policy Framework, the Council will meet on a regular basis and report to the Fijian Cabinet.

The Trade and Development Committee (TDC) chaired by the Permanent Secretary for Industry, Trade and Tourism will be the executive arm of the NTDC and will meet as and when required to provide direction to the services sub-committee and advice to the NTDC. The services sub-committee will comprise of technical bodies of the NTDC. The services sub-committee, like the NTDC will be inclusive and representative of all stakeholders.

Figure 15. Fijian Tourism 2021 Reporting Structure



Trade and Development Committee

A Trade and Development Committee will guide and assist the delivery of FT 2021. The Committee will consist of MITT, Tourism Fiji, SOFTA, FHTA, Fiji Airways, FRCS and Investment Fiji. Other agencies could be co-opted as required. The Committee will meet every three months to:

1. Establish factors that have changed in the markets;
2. Assess progress on the implementation of the FT 2021 strategies;
3. Resolve issues, make changes to projects, and put in place new actions as required; and
4. Agree on responsibilities and priorities.

Separate working groups will be formed to manage complex or larger activities as part of FT 2021, such as growing air access to Fiji, enhancing Fiji's tourism quality, mapping out training programmes for the sector, or putting in place improvements to environmental and planning regulations to update and protect the character of Fiji's regions.

Resource Mobilisation

The Government will allocate resources to implement this Plan through its general national budget process and the Ministry of Industry, Trade and Tourism will liaise annually with the Ministry of Economy to mobilise additional resources from development partners and international organisations.

Monitoring and Evaluation

MITT will serve as the principal institution responsible for the monitoring and evaluation of this plan on behalf of the Fijian Government. The key instrument that will be used to undertake monitoring and evaluation will be the Implementation Matrix.

The Government, through MITT, will collaborate with the respective responsible Ministries/agencies through the National Trade and Development Council which is the established public-private-civil society dialogue mechanism to periodically monitor progress and implementation of FT 2021.

Annex 1: Implementation Matrix

MINISTRY OF INDUSTRY, TRADE AND TOURISM FIJIAN TOURISM 2021 IMPLEMENTATION FRAMEWORK						
		TIMELINE Short: 1-3yrs Med: 3-5yrs Long: 5+yrs	ESTIMATED COSTS	SDG LINK	IMPLEMENTING PARTNER	FORM OF SUPPORT
AREA 1: DRIVING DEMAND FOR THE FIJIAN TOURISM BRAND						
S.1	Fijian Tourism brand promotion	The objective of this strategy is to ensure that Tourism Fiji effectively markets Fiji and maximises the return on investment of the marketing grant given by Government.				
S.1.A	Review and realignment of the Fijian brand	Short	\$400,000	SDG17	Lead: Tourism Fiji	Govt funding
S.1.B	Revitalise tourism marketing strategies	Short	\$400,000	Within Tourism Fiji's existing budget	Lead: Tourism Fiji Support: Tourism Industry	Govt funding

AREA 1: DRIVING DEMAND FOR THE FIJIAN TOURISM BRAND

S.1.C	Strengthen partnerships among Fijian trade and foreign missions, Tourism Fiji, Film Fiji, Investment Fiji, Fiji Airways and industry partners in the promotion of brand Fiji	Close collaboration will be encouraged amongst these organisations to dovetail initiatives in order to maximise marketing and promotional opportunities.	Medium Short	\$20,000 per year (for coordination)	SDG16 SDG17	Lead: Tourism Fiji Support: Film Fiji Investment Fiji Fiji Airways Industry partners	Govt funding
S.2	Grow Off-Peak Season Events	This strategy is to ensure a steady supply of visitor arrivals to Fiji is maintained throughout the year to address seasonality.					
S.2.A	Strengthen the Events Development Fund	The EDF will be a contestable fund managed through MITT, using strict selection criteria. The fund aims to institutionalise the bidding process, endorsement, hosting of events and monitoring of return on investments on these events.		\$20,000 (establishment) \$200,000/year (implementation)	SDG 1 SDG 2 SDG 8	Lead: MITT Support: MOE	Govt funding
S.2.B	Promote international sporting events	Sporting events have been identified as a major contributor to visitor arrivals globally. It will be an important driver of off-peak season arrivals, providing an avenue to position Fiji as a sports tourism destination that encourages return visits.	Medium	\$20,000/year (Coordinating costs)	SDG3	Lead: MITT Support: Tourism Fiji Ministry of Youth and Sports	
S.2.C	Promoting Fiji as a MICE destination	The Fijian Government will formulate supportive policies and incentives to promote the MICE segment. Additionally, Tourism Fiji to develop a marketing strategy to tap into global and regional MICE market.	Medium	\$20,000/year (admin costs) Marketing costs – Within Tourism Fiji's existing budget	SDG 1 SDG2 SDG8	Lead: MITT Support: Tourism Fiji Tourism stakeholders	

AREA 1: DRIVING DEMAND FOR THE FIJIAN TOURISM BRAND						
This strategy is focused domestically to create effective awareness of the full range of Fiji's tourism product offerings to encourage visitor spend and complement Tourism Fiji's brand promotion and destination marketing abroad.						
S.3	Integrate Visitor Information					
S.3.A	Streamline and strengthen electronic visitor guides	<p>Comprehensive visitor guides will be used for marketing Fiji's products to potential visitors and as a primary visitor information source when travelling in Fiji.</p> <p>Visitor guides will be specific to the regions' product offerings in an attempt to highlight the unique selling point of a particular tourism region.</p>	Medium	<p>\$1m (initial cost for information gathering design)</p> <p>\$300,000/year (updating)</p>	<p>SDG 1</p> <p>SDG2</p> <p>SDG 8</p> <p>SDG 11</p> <p>SDG 17</p>	<p>Lead: Tourism Fiji</p> <p>Support: MITT Destination Marketing Organisations Industry stakeholders</p>
S.3.B	Establish visitor information desks	<p>Visitor information desks in various tourism hubs will be supplied with up to date and pertinent information to allow visitors to directly enquire and seek independent opinion. MITT to facilitate with implementing partners, including municipal councils, while Tourism Fiji provides the marketing collaterals.</p>	Long	<p>\$100,000 (initial scoping and set up at pilot sites)</p> <p>\$100,000 per year for up keeping and admin following establishment)</p>	<p>SDG 11</p> <p>SDG 17</p>	<p>Lead: MITT</p> <p>Support: Ministry of Local Government Tourism Fiji</p>

AREA 2: INCREASING THE VALUE OF THE FIJIAN TOURISM PRODUCT

<p>The objective of this strategy is to grow the value of the industry by improving the quality of Fiji's tourism product offerings. This will be a long-term strategy to ensure that Fiji becomes a premium tourist destination in the South Pacific.</p>							
S.4	Enhance Quality						
S.4.A	Encouraging adoption of higher standards for the tourism industry	This strategy will involve developing national standards, in line with international best practices in the industry.	Long	\$300,000 (one time cost for profiling of existing standards & development of a guideline) \$100,000 per yr (to encourage adoption of standards)	SDG 16 SDG 17	Lead MITT/IFC	Technical assistance for profiling of existing standards through competitor destination and niche market research for development of a guideline
S.4.B	Renew the FIJIAN HOSTS Customer Services Training Program	MITT will partner with relevant organisations and the industry to revamp the FIJIAN HOSTS Customer Service Programme. The programme aims to raise the standard of customer service at the Nadi International Airport and act as a benchmark for customer service in the Fijian tourism industry. As such, it will work towards national accreditation and encourage industry wide participation.	Medium	\$500,000 (one time cost of renewing the program) \$100,000 per yr. for maintaining the program	SDG 16 SDG 17	Lead: MITT GIZ NZ MIFAT	
S.4.C	Establish Code of Conduct for tour operators	A Code of Conduct will be established to ensure tour operators maintain the highest standards of service, especially when engaging with communities and visitors. Conditions will be issued with business licenses from the relevant authorities and any breach of the code of conduct may impinge on the decision to grant or renew a business license.	Short	\$50,000	SDG 16 SDG 17	Lead: MITT Support: GIZ Society of Fiji Travel Associates (SOFTA) Fiji Hotel and Tourism Association (FHTA)	

AREA 2: INCREASING THE VALUE OF THE FIJIAN TOURISM PRODUCT

<p>The objective of this strategy is to ensure Government's support for local tourism MSMEs for the continued improvement of quality and high-value visitor experiences while spreading the benefit of tourism throughout the country.</p>								
S.5	Support Micro, Small and Medium Tourism Operators							
S.5.A	Facilitate access to online booking platforms for small tourism operators	Medium	\$60,000/year (training, monitoring & admin)	SDG 4 SDG 8 SDG 10 SDG 11 SDG 17	Lead: MITT Tourism Fiji Support: FITBA MDF			
S.5.B	Use existing Government programmes to support tourism MSMEs	Medium	\$200,000/year (training and admin costs)	SDG 1 SDG 2 SDG 5 SDG 8 SDG 10 SDG 17	Lead: MITT Tourism Fiji (EDF 11) Support: Indian Government SPTO SPC PIFS			
S.5.C	Strengthening the capacity of MSME industry groups to better represent the interests of their members with Government and industry	Medium	\$200,000/year (support & admin costs)	SDG 16 SDG 17	Lead: MITT Support: Industry groups and associations			

AREA 2: INCREASING THE VALUE OF THE FIJIAN TOURISM PRODUCT

S.5.D	Conduct community tourism awareness	Government, industry and key stakeholders will jointly conduct community awareness and encourage participation of resource owners in tourism developed. Communities will be encouraged to partner or establish their own business ventures, thus spreading the economic benefits of tourism.	Short	\$200,000/year (awareness and admin costs)	SDG 1 SDG 2 SDG 5 SDG 8 SDG 10 SDG 17	Lead: MITT Support: UN Food and Agriculture Organisation (UNFAO) NZ Dept. of Conservation (Ecotourism development support)	
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AREA 3: FACILITATING AND PROMOTING FOREIGN AND DOMESTIC INVESTMENT IN TOURISM

S.6	Promotion and facilitation of investments in the tourism sector	The objective of this strategy is to ensure appropriate investments are realised in the tourism sector and Fiji has sufficient capacity to cater for the forecasted increase in accommodation requirements to complement the expected growth in future visitor arrivals.				
S.6.A	Building the capacity of Investment Fiji	Medium	\$100,000 per yr. (for capacity building)	SDG 8 SDG 9 SDG 17	Lead Investment Fiji Support MITT	
S.6.B	Develop a tailor-made incentive package to encourage investment in visitor attractions and related activities	Medium	\$50,000/year (admin costs)	SDG 8 SDG 9 SDG 17	Lead: Investment Fiji Support: MITT FRCS	
S.6.C	Strengthening and streamlining investment approval process				Lead: MITT Singapore Cooperation Enterprise Investment Fiji	

AREA 3: FACILITATING AND PROMOTING FOREIGN AND DOMESTIC INVESTMENT IN TOURISM

The objective of the strategy is to diversify Fiji's tourism product offerings to attract and retain high value tourism on factors beyond price.						
S.7	Stimulate Product Diversification and Development across Fiji			Long		
S.7.A	Create a world class luxury shopping experience	This aims to create an enabling environment to attract major international brands to support the development of a world class luxury shopping experience. As such, it will focus on:	<ul style="list-style-type: none"> 1) private sector led investment in infrastructure to attract international brands; 2) providing the right tax policy and location for private sector investment; and 3) conducting a feasibility study to assess the viability of establishing a world class shopping hub, possibly at the Special Economic Zone (SEZ). 	SDG 8 SDG 9	Lead: MITT Investment Fiji FRCS Support: Ministry of Lands Industry stakeholders	
S.7.B	Explore the potential of alternative or niche tourism	Fiji, being a multicultural country, can capitalise on these strengths to explore niche tourism such as cultural tourism, medical tourism and culinary tourism.		Medium	\$200,000 (for the study)	SDG 11 SDG 12 SDG 16 SDG 17 MITT IFC Technical assistance – conduct of niche market research

AREA 3: FACILITATING AND PROMOTING FOREIGN AND DOMESTIC INVESTMENT IN TOURISM

S.8	Utilise Fiji's Existing Natural, Cultural and Heritage Resources	The objective of this strategy is to utilise the many natural, cultural and heritage resources Fiji has for tourism purposes in a sustainable manner.				
S.8.A	Rejuvenate existing natural, cultural and heritage sites for tourism use	A Government-led programme to rejuvenate existing natural, cultural and heritage sites in Fiji including Suva, Levuka and Nadi. This will require leadership from land management and culture and heritage agencies to establish infrastructure and improve access to these areas. Private sector can then leverage this infrastructure to develop products and experiences for visitors.	Long	\$1m (scoping and infrastructure development)	SDG 11 SDG 12 SDG 16 SDG 17	Lead: MITT Department of Heritage and Arts National Trust UNESCO Tourism Fiji (EDF 11) NZ Dept. of Conservation GIZ
S.8.B	Promote Fiji as a cultural hub in the region through theatre, arts, music and visual performances	Facilitate the development of cultural attractions to complement an integrated approach to tourism development.	Long	\$1.5m (one time cost to develop and operationalize the anchor cultural attraction in Nadi)	SDG 11 SDG 12 SDG 16 SDG 17	Lead Ministry of Local Government/ Nadi Town Council MITT Investment Fiji

AREA 4: INVESTING IN TOURISM RELATED INFRASTRUCTURE

		The objective of this strategy is to ensure that air access to Fiji is not an inhibiting factor to tourism growth.					
S.9	Increase Air Access to Fiji						
S.9.A	Continue to increase connectivity	Fiji Airways will dovetail initiatives with Tourism Fiji to strategically grow direct flights to key markets using current, and possible new Air Services Agreement.	Medium	\$200,000 per yr. (for building business cases, lobbying, admin marketing support)	SDG 8 SDG 9 SDG 17	Lead: Ministry of Civil Aviation Support: Fiji Airways Tourism Fiji Fiji Airports Limited	
S.9.B	Maintain air link to South East Asia	Hong Kong, South Korea, Singapore and Japan provide important access hubs for Fiji to grow the South and South East Asian markets and leverage access to other tourism markets in India, Malaysia and Indonesia.	Medium	\$500,000 a yr. for marketing support	SDG 8 SDG 9 SDG 16 SDG 17	Lead: Fiji Airways Tourism Fiji	
S.9.C	Encourage and facilitate market analysis on potential future destinations	A market analysis will be undertaken to identify potential visitor source markets e.g. Dubai, Shanghai, Beijing, Mumbai, Canada etc.	Medium	\$100,000 (one time cost for a full market analysis on all potential source markets)	SDG 4 SDG 8 SDG 9 SDG 17	Lead: MITT Support: Tourism Fiji	

AREA 4: INVESTING IN TOURISM RELATED INFRASTRUCTURE						
S.10	Increase Capacity on Domestic Flights	The objective of this strategy is to address the issue of tourism supply and demand in the outer island regions of Fiji.				
S.10.A	Improve flight connections and distribution to important tourism regions	<p>The Fijian Government to partner with domestic air carriers in order to:</p> <ul style="list-style-type: none"> Review the commercial and economic viability of domestic air services Assess demand for travel to Vanua Levu, Taveuni and Kadavu as identified regions that have potential for tourism development Improve connection to international flight schedules to make travel to the outer islands seamless 	Medium	\$250,000 (one time cost for review and demand assessment)	SDG 1 SDG 2 SDG 8 SDG 9 SDG 10 SDG 11 SDG 16 SDG 17	Lead: Ministry of Civil Aviation Fiji Airways Support: MITT Tourism Fiji Fiji Airways Fiji Hotel and Tourism Association ADB
S.11	Support Essential Airport Developments	The objective of this strategy is to ensure international airports are developed simultaneously with the tourism industry.				
S.11.A	Closer collaboration between Government and FAL	The Fijian Government will work closely with FAL to continue modernising and upgrading international airports and its supporting infrastructure.	Medium		SDG 8 SDG 9 SDG 17	Lead: Fiji Airports Limited
S.12	Improve Port Facilities for Cruise Tourism	The objective of this strategy is to ensure that port facilities in Fiji are conducive to the development of the cruise industry.				
S.12.A	Conduct an economic impact assessment of the cruise industry in Fiji	The economic impact assessment will assist in ascertaining the viability of a dedicated cruise ship terminal and the necessary investment required.	Short		SDG 8 SDG 9 SDG 11 SDG 17	Lead: MITT IFC Support: Kantar TNS

AREA 4: INVESTING IN TOURISM RELATED INFRASTRUCTURE

S.12.B	Closer collaboration between Government and relevant stakeholders	Ensuring upgrade and maintenance of relevant marine infrastructure is carried out in coordination with stakeholders to facilitate cruise tourism development, ensure visitor safety and enhance cruise tourism experience.	Medium	SDG 8 SDG 9 SDG 11 SDG 17	Lead: Fiji Roads Authority (FRA) Maritime Safety Authority of Fiji (MSAF) Support: ADB	Technical Assistance – including the impact assessment
S.12.C	Undertake a review of all support services for cruise ships	The review to take into consideration fuel standards, portable water supply and other essential support services to cruise ships in efforts to further improve services and continue to make Fiji a favoured port of call in the Pacific region.	Short	SDG 4 SDG 17	Lead: MITT IFC Support: Industry stakeholders	\$300,000 (one time cost for the review)

AREA 4: INVESTING IN TOURISM RELATED INFRASTRUCTURE						
S.13	Improve Expedition Standards for Yachting in Fiji	The objective of this strategy is to ensure that Fiji is a yachting friendly destination, which can help generate valuable tourism for the outer islands.				
S.13.A	Provide better services for yachting	<p>This includes:</p> <ul style="list-style-type: none"> The Fiji Hydrographic Unit (FHU) to update navigational charts following the successful hydrographic mapping of high-use areas of Mamanucas, Yasawas and Kadavu. Installation of moorings in high visitation areas. This will protect the environment and make yachting easier to designated areas. Improve pump-out facilities for boats. Supporting the facilitation of information guides (such as the annual Fiji Shores and Marina Guide) Support the development of customs stations in locations such as Lau to enable yachts travelling into Fiji to spend time in the outer islands Review and consider a specialised visa of foreign boats such as yachts to increase the length of stay. 	Medium	\$200,000/year for 5 years (to progressively work on providing better services for yachting)	SDG 1 SDG 2 SDG 3 SDG 5 SDG 8 SDG 9 SDG 10 SDG 11 SDG 16 SDG 17	Lead: Fiji Hydrographic Unit, Fiji Navy Dept. of Transport Support: Australian DFAT FRCS Fiji Ports Corporation Limited (FPCL) Biosecurity Authority of Fiji (BAF) MSAF Min. of Rural & Maritime Development Development Partners
S.14	Forward planning for roads	The objective of this strategy is to ensure that growth in the tourism sector is integrated in plans for Fiji's roads and bridges.				
S.14.A	Ensure plans for transport infrastructure considers demand from the tourism sector	A proactive approach to tourism planning and development must be undertaken in consultation with FRA and relevant stakeholders.	Short	\$50,000/year (for admin)	SDG 8 SDG 9 SDG 10 SDG 11 SDG 16 SDG 17	Lead: Fiji Roads Authority Min. of Infrastructure & Transport

AREA 4: INVESTING IN TOURISM RELATED INFRASTRUCTURE

<p>The objective of this strategy is to ensure that Fiji is a yachting friendly destination, which can help generate valuable tourism for the outer islands.</p>		SDG 6 SDG 7 SDG 8 SDG 9 SDG 10 SDG 17	Lead: Ministry of Infrastructure and Transport (MOIT) Water Authority of Fiji (WAF) Energy Fiji Limited (EFL)
S.15	Forward Planning for Water Supply, Energy and Sewerage Systems		
S.15.A	Ensure future plans consider demand from the tourism sector	Short	Future water, energy and sewerage capacity development needs to support future tourism development needs. WAF and EFL must be kept up-to-date with the status of new tourism projects to allow for upgrades to existing capacity to cater for new developments.
S.15.B	Identify options for improving water supply in outer islands	Medium	WAF to provide island resorts with advice and technical expertise on increasing their water supply and reliability. Donor funding may be required for outer islands to implement projects.
S.15.C	Develop a plan to improve the sewerage systems	Medium	A plan needs to be developed to improve the sewerage systems.
		SDG 6 SDG 9 SDG 11 SDG 17	Lead: WAF Development partners
		SDG 3 SDG 6 SDG 9 SDG 10 SDG 11 SDG 17	Lead: MOIT WAF Development partners

AREA 5: STRENGTHENING LINKAGES TO THE TOURISM INDUSTRY

The objective of this strategy is to strengthen linkages of human resource supply to tourism.

S.16	Linking Human Resources to the tourism industry											
S.16.A	Conduct a tourism industry human resource needs assessment	Conduct a human resource needs assessment to find out the skills in the tourism industry, in order to ascertain existing skill bases and required training programmes.	Short	\$3000,000 (one time cost for conducting HR needs assessment)	SDG 4 SDG 8 SDG 9 SDG 10 SDG 16 SDG 17	MITT IFC	Technical Assistance – Conduct a HR Needs Assessment with the focus on employability within the industry					
S.16.B	Encourage career development and capacity building of Fijians in the industry	Incentivising tourism operators to encourage up-skilling and career development of Fijians in the industry with the aim of encouraging mentoring programmes where locals understudy expatriates for career progression.	Medium	\$300,000 (one time cost for scoping work and establishment of the scheme)	SDG 3 SDG 4 SDG 8	Lead: Dept of Labour MITT Tertiary Education Loan Scheme (TELS) Tourism Training Institutions (USP, FNU, etc.)						
S.16.C	Utilisation of Cooperation Agreements	MITT will utilise MOU's and bilateral agreements available to assist the tourism industry target new and emerging markets, for instance language and cultural trainings.										

AREA 5: STRENGTHENING LINKAGES TO THE TOURISM INDUSTRY

		The objective of this strategy is to strengthen the linkages of the agriculture and aquaculture sectors to tourism.						
S.17	Linking agriculture and aquaculture industries to the tourism industry							
S.17.A	Develop a recognition and rewards scheme for service providers	Facilitate initiatives to develop a recognition and rewards systems for service providers making efforts to promote the use of local produce in their operations.	Medium	\$100,000 (one time cost for developing the scheme) \$100,000 per yr (to support the scheme)	SDG 1 SDG 2 SDG 3 SDG 5 SDG 8 SDG 10 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	IFC MITT Ministry of Agriculture UNFAO Tourism stakeholders	Technical Assistance- Determine most effective incentive structure and support awards	
S.17.B	Continuation of Government assistance to farmers	Capacity building programmes need to be prioritised by the Ministry of Agriculture to up skill farmers and nurture innovative and smarter agricultural practices.	Medium	\$100,000 (one time cost for developing the scheme) \$1m per yr. (for implementation of the grant scheme)	SDG 1 SDG 2 SDG 3 SDG 5 SDG 8 SDG 10 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	Lead: MITT Ministry of Agriculture Support: Development partners Tourism stakeholders		
S.17.C	Improve synergy between stakeholders	Strengthening linkages between Government, agriculture, aquaculture and the tourism sector that will enable the creation of commercial value chains and ensuring consistent supply to meet tourism industry demands. Workshops on a technical level between the Government, farmers and the Tourism industry to be conducted on a need basis and annual forums to act as a platform for continued collaboration between the stakeholders.	Short	\$200,000/year (admin costs)	SDG 1 SDG 2 SDG 3 SDG 5 SDG 8 SDG 10 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	MITT IFC Ministry of Agriculture FHTA Farmer associations	Technical Assistance & Implementation – support based on results of agri-study with on-ground partner for logistics and implementation	

AREA 5: STRENGTHENING LINKAGES TO THE TOURISM INDUSTRY

S.17.D	Promotion of Fijian Grown and Fijian Organic	Continue encouraging local consumption through the Fijian Made-Buy Fijian Campaign.	Medium		SDG 1 SDG 2 SDG 3 SDG 5 SDG 8 SDG 10 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	MITT	
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AREA 6: ENSURING CONTINUED SUSTAINABLE DEVELOPMENT OF THE TOURISM INDUSTRY

S.18	Sustainable Tourism Development Framework	The objective of this strategy is to bring together under a single platform the efforts and commitments of Government and all stakeholders towards the sustainable development of Fiji's tourism industry taking into account Fiji's Green Growth Framework.					
S.18.A	Formulate a Sustainable Tourism Development Framework	MITT will engage partners to carry out a study of Fiji's current legislative framework and practices with regards to sustainable tourism, the outcomes of the study will guide Fiji's response to the formulation of a Sustainable Tourism Development Framework.	Short	\$500,000 (one time cost for the formulation and roll out of the Framework) \$100,000/year (implementation)	SDG 8 SDG 9 SDG 11 SDG 12 SDG 13 SDG 14 SDG 15 SDG 17	Lead: MITT UN World Tourism Organisation (UNWTO) Support: Govt agencies	Scoping exercise completed via a UNWTO technical mission
S.19	Increase Environmental Compliance	The objective of this strategy is to improve environmental compliance of the tourism industry.					
S.19.A	Strengthen enforcement of the Environmental Management Act (EMA) and the Environmental Impact Assessment (EIA)	This sub strategy calls for increased efficiency and efficacy within the Department of Environment.	Short		SDG 3 SDG 6 SDG 7 SDG 8 SDG 9 SDG 10 SDG 11 SDG 12 SDG 13 SDG 14 SDG 15 SDG 16 SDG 17	Lead: Dept. of Environment Tourism Police	

AREA 6: ENSURING CONTINUED SUSTAINABLE DEVELOPMENT OF THE TOURISM INDUSTRY

S.20	Protection of reef, marine and coastal areas	The objective of this strategy is to ensure that protection of the reef and marine areas are mandated by Government.				
S.20.A	Encourage sustainable practises and alignment with marine conservation	Extra protections for the marine environment will be encouraged. These will consider ways to minimise tourism's impact on maritime sites, for instance buoy moorings at popular dive sites. In addition, a pilot project to establish a Marine Protected Park in the Mamanuca Islands, in association with the Mamanuca Environment Society, has been discussed as a potential landmark project.	Medium	\$200,000 (one time cost for developing the policy and/or legislation) \$100,000 per yr. (for implementation and monitoring)	SDG 1 SDG 2 SDG 3 SDG 8 SDG 11 SDG 13 SDG 14 SDG 15 SDG 16 SDG 17	Lead: Min. of Fisheries Dept. of Environment Fiji Locally Managed Marine Areas (FLMMA) Mamanuca Environment Society Industry Associations
S.21	Promote climate resilient infrastructure and Energy Efficiency	The objective of this strategy is to encourage climate change preparedness and promote energy efficiency within the tourism industry.				
S.21.A	Enforce building codes that promote climate resilient infrastructure	Building codes for infrastructure development must be complied with to ensure materials and techniques used consider climate change effects to improve durability and lifetime of developments.	Medium		SDG 9 SDG 11 SDG 12 SDG 13 SDG 15 SDG 17	Lead: MITT
S.21.B	Promote renewable energy utilisation in the tourism industry	Subsidies and rebates could be considered for tourism businesses to purchase renewable energy and energy efficient equipment to encourage green tourism.	Short	\$250,000 (one time cost for scoping work/needs assessment and implementation)	SDG 7 SDG 9 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	IFC Dept. of Energy MITT In partnership with IFC Pacific Energy team

AREA 6: ENSURING CONTINUED SUSTAINABLE DEVELOPMENT OF THE TOURISM INDUSTRY

S.22	Protect Fiji's Unique Cultural Identity	The objective of this strategy is to ensure that Fiji remains distinct from competitors in terms of culture and to ensure that Fiji's unique cultural identity remains protected.				
S.22.A	Collaboration with key stakeholders	Strengthening collaboration and dialogue with key Government and industry partners to protect our cultural and traditional knowledge.	Short	\$ 100,000	SDG 3 SDG 5 SDG 8 SDG 10 SDG 11 SDG 12 SDG 13 SDG 15 SDG 16 SDG 17	Ministry of iTaukei Affairs/ Dept. of Heritage & Arts Solicitor General's Office

AREA 7: BUILDING A CONDUCTIVE AND UPDATED LEGAL FRAMEWORK FOR THE TOURISM INDUSTRY

S.23.A	Formulation of a Tourism Industry Act	There is a need for consistency and coordination in order to meet the needs of the tourism industry.						
S.23.A	Draft a Tourism Industry Act	The Act will guide the tourism industry and empower the Government to develop, implement and enforce standards in the tourism industry.	Short	\$200,000 (one time cost for review of current draft and finalisation)	SDG 3 SDG 8 SDG 9 SDG 11 SDG 12 SDG 13 SDG 16 SDG 17	Lead: MITT Solicitor General's Office Support: IFC/World Bank Industry	Technical Assistance – World Bank Trade and competitiveness team to support MITT directly	
S.23.B	Ensure compliance to legal requirements and standards	Provide assistance and guidance to tourism operators to comply with legal requirements and standards.	Medium	\$100,00/ year (admin costs)	SDG 3 SDG 8 SDG 9 SDG 11 SDG 12 SDG 13 SDG 16 SDG 17	Lead: MITT Tourist Police Hotel Licensing Board (HLB)		

AREA 8: ENHANCING RISK MANAGEMENT WITHIN THE TOURISM INDUSTRY

S.24	Identifying Risks associated with the tourism industry	The objective of this strategy is to bring to the forefront risks associated with the tourism industry and ensure they are incorporated in to crisis management structures.				
S.24.A	Risk profiling and appropriate mitigation measures	A risk audit to identify and profile all major potential risks associated with Fiji's tourism industry in consultation with key stakeholders.	Short	\$500,000 (onetime costs for risk profiling)	SDG 3 SDG 11 SDG 12 SDG 16 SDG 17	Lead: MITT NDMO Support: Academic research institutions UNWTO UN Development Programme (UNDP) UN Environment Programme (UNEP) Tourism stakeholders
S.25	Tourism Crisis Communication Framework	The objective of this strategy is to formalize the TCC Guide that ensures the safety and well-being of visitors to Fiji, staff and teams of the Fijian tourism industry during a crisis.				
S.25.A	Draft Tourism Crisis Communication Framework (TCC Framework)	MITT to develop guidelines in consultation with relevant stakeholders in line with international best practices.	Short	\$100,000	SDG 3 SDG 11 SDG 12 SDG 16 SDG 17	MITT UNWTO UNDP UNEP
S.25.B	Implement the Tourism Crisis Communications Framework	This sub strategy requires a systematic approach in the implementation and regular review of the TCC Framework.	Medium	\$200,000/year (implementation and yearly review and update of the Guide)		MITT Tourism stakeholders
S.25.C	Institutionalise the Tourism Response Team (TRT) and strengthen collaboration with industry	TRT will be reviewed by MITT. Membership and responsibilities of the TRT will be provided for in the TCC Framework.	Medium	\$200,000 per year (communications & admin)	SDG 3 SDG 11 SDG 12 SDG 16 SDG 17	MITT Tourism Response Team

AREA 9: MEASURING THE PERFORMANCE OF FIJI'S TOURISM INDUSTRY						
S.26	Measuring Economic Impact of Tourism	The objective of this strategy is to ensure accurate measurement of the economic impact of tourism in Fiji.				
S.26.A	Facilitate the publication of TSA reports every two years	The TSA is an important document which needs to be produced on a 2-year interval to accurately ascertain the economic flows throughout the industry, allow informed policy decisions, and target areas in need of stimulus.	Medium	SDG 4 SDG 8 SDG 9 SDG 11 SDG 12 SDG 16 SDG 17	Lead: FBOS RBF Support: UNWTO ADB MITT	
S.27	Establishing Robust Data Collection Methods	The objective of this strategy is to ensure that tourism data collection methods are efficient and robust in nature.				
S.27.A	Complete modernisation of the International Visitor Survey	Modernisation of both components of the IVS (air and cruise).	Short	\$150,000 per yr.	SDG 4 SDG 8 SDG 9 SDG 11 SDG 12 SDG 16 SDG 17	Lead: MITT IFC Support: SMS Research Technical Assistance – Conduct Gaps Analysis and make recommendation
S.27.B	Capacity building for in-house reporting of the International Visitor Survey	The Ministry to build in-house capacity to ensure staff are trained to analyse IVS data and provide quarterly reports for policy and business decision making.	Medium	\$200,000 (one time cost for internal capacity building) 50,000 per yr. (for refresher trainings)	SDG 4 SDG 8 SDG 9 SDG 11 SDG 12 SDG 16 SDG 17	Lead: MITT IFC Technical Assistance – provision of capacity building

AREA 9: MEASURING THE PERFORMANCE OF FIJI'S TOURISM INDUSTRY

S.27.C	Establish the Hotel Data Collection System	MITT will develop the HDCS and mandate implementation for all tourism accommodation properties.	Short	\$80,000		<p>Lead: MITT ITC</p> <p>Support: Fiji Bureau of Statistics (FBOS) FRCS RBF Min. of Economy Solicitor General's Office Tourism stakeholders</p>	
S.28	Improving Market Research and Intelligence	The objective of this strategy is to ensure that future marketing decisions are based on concrete research to help maintain our competitive edge.					
S.28.A	Conduct segmentation research on Fiji's established and emerging source markets	The research will provide valuable insights into Fiji's emerging markets and enable priorities to be set for growing value from these markets.	Short	\$300,000 (segmentation research)	\$100,000/year (continuous review and adjustment of initial research report according to market trends)	<p>SDG 4 SDG 8 SDG 9 SDG 11 SDG 12 SDG 16 SDG 17</p>	<p>Lead: MITT Tourism Fiji Tourism stakeholders</p>
S.28.B	Research on competing destinations for Fiji	In depth analysis of Fiji's competing destinations.	Short	\$300,000 (market research)	\$100,000 per yr. (for review of the initial market research and adjustment to changes in the market)	<p>SDG 4 SDG 8 SDG 9 SDG 11 SDG 12 SDG 16 SDG 17</p>	<p>MITT IFC</p> <p>Technical Assistance – Conduct research on competing destinations</p>

Annex 2: Calculation on projected visitor numbers and visitor spend

The calculation of FJ\$2.26 billion in direct visitor spend by 2021 is based on a projected increase in total visitor expenditure of 6% p.a. This is attributable to an increase in the number of visitors as well as an increase in the spend per visitor trip. Overall, it is calculated that there will be:

- 933,630 visitor arrivals to Fiji in 2021 (3.34% p.a. increase from 2016-2021)
- 2.42% p.a. increase in average expenditure per visitor for the whole trip (2016-2021).

Visitor arrivals

Visitor arrivals have increased at a rate of 3.34% p.a. over the years from 2012-2016. The Ministry believes that this period represents the cyclic nature of the industry over a five-year period. A projection of this rate of increase until 2021 indicates that 933,630 visitor arrivals could be expected. This implies 140,000 additional visitors by 2021, compared to 2016 levels.

When excluding the impact of the cruise ship market in Vanuatu, a rate of growth of 3.34% p.a. is the fastest in the South Pacific.

Visitor spend

The Fiji Bureau of Statistics reported that direct visitor spend in 2015 was FJ\$1.56 billion. Based on 754,835 visitor arrivals in 2015, this equates to an average total direct spend of FJ\$2,067 per visitor for their whole trip. It is estimated that visitor spend will increase at a rate of 2.42% p.a. from 2017 to 2021, in line with the inflationary trend for the past five years. This equates to an average spend per visitor of FJ\$2,420 in 2021. This increase in visitor spend per person is attributed to the implementation of the strategies in FT 2021 as the historic growth in spend has actually been much lower.

Annex 3: Additional Statistics

Table 8. Tourist Arrivals of Pacific ACP and SPTO Member Countries 2016, South Pacific Tourism Organisation

South Pacific Destination	2016 Visitor numbers	5-Year Average Annual Growth Rate (%)	2016 Market Share (%)
Fiji	792,320	3.3	38.2%
Cook Islands	146,473	5.5	7.1%
French Polynesia	192,495	3.5	9.3%
New Caledonia	115,676	0.7	5.6%
Palau	138,416	6.4	6.7%
Papua New Guinea	197,632	1.7	9.5%
Samoa	145,176	2.8	7.0%
Tonga	59,130	8.8	2.9%
Vanuatu	95,117	0.8	4.6%
Others ¹	190,099	n/a	9.2%
Total	2,072,534	3.7	100.0%

¹ Others are: American Samoa, FSM, Kiribati, Marshall Islands, Nauru, Niue, Solomon Islands, Timor Leste, Tuval


Table 9. Tourist Arrivals in Pacific ACP and SPTO Member Countries by Source Markets 2016, South Pacific Tourism Organisation

Market	2016	5 Years Average Annual Growth Rate (%)	2016 market share (%)
Australia	607,253	1.2	31.2
NZ	400,421	6.7	20.6
USA	193,923	4.8	10.0
UK	34,562	-1.6	1.8
Europe	191,263	2.3	9.8
China	142,745	33	7.3
Japan	75,701	-2.4	3.9
Other Asia	114,959	-1.0	5.9
Pacific Islands	126,129	3.8	6.5
Other Countries	58,027	1.4	3.0

Annex 4: Tax Free Regions

Figure 16. Tax Free Tourism Development Regions of Fiji



 - Tax Free Regions

Annex 5: Fiji's Natural Attractions

Table 10. Fiji's Natural Attractions

Navala Traditional Village	Ba	Navala Village is a 200-year-old historical site of Fiji and provides visitors with an authentic glimpse into Fiji's culture and traditions.
Beqa Island	Beqa	Few are aware of the WWII radar station past an old village fortification that holds the islands deep history. In addition, the island offers spectacular underwater adventures, especially the shark viewing excursions.
Namena Marine Reserve	Bua Province	Fiji's largest marine protected area and one of the top dive destinations in the world, the Namena Marine Reserve offers visitors an enthralling experience of marine life including vibrant corals, diverse fish, sharks, whales, dolphins, turtles, rays, and the rare whale shark.
Koroyanitu National Heritage Park and Mount Datilamu	Lautoka	The park offers visitors beautiful flora, fauna and archaeological sites on display while walking up Mount Batilamu. At its peak, lies a view of the Yasawa and Mamanuca Islands, as well as the entire Lautoka "sugar" city.
Delainadarivatu and Southridge Mount Tomanivi	Nadarivatu	This location presents a unique opportunity for hikers, coupled with bird watching and stunning views of the surrounding landscape. Mount Tomanivi, formerly known as Mount Victoria, is Fiji's highest mountain reaching to an altitude of 1,323 m above sea level and boasts a cloud forest, endemic flora and fauna, and rare birds and orchids.
Wailotua Cave and Waidina Waterfall	Nausori	Wailotua Cave is one of Viti Levu's remaining roosting and nesting cave of the ecologically vulnerable Fiji blossom bat. The location is rich with Fijian history and folklore. Waidina waterfall is located near the cave and is an interesting site for visitors.
Great Sea Reef	Northern Vanua Levu to Yasawas	The barrier reef spans over 200 km and is Fiji's largest reef system and also the world's third longest continuous barrier reef system. This reef offers a diversity of tropical corals, fish, sharks, rays, turtles and marine mammals.
Colo-i-Suva Forest Park	Pacific Harbour	Colo-i-Suva Forest Park provides the opportunity to bird watching and exploring Fiji's diverse plant life. There are well marked trails along a corridor of interesting flora and fauna with complimenting freshwater pools.
Bligh Waters, Nabalesere Waterfall and Vatu-i-Ra Island	Rakiraki	Bligh waters are one of Fiji's best dive sites. During the southern hemisphere winter from June to September, pods of humpback whales use these waters as a breeding and calving grounds before returning to the Antarctic to feed. Nabalesere Waterfalls lies at the foothills of the greater Tomanivi area offers a delightful experience to its visitors, who come to discover this magnificent aquatic feature and swim in its cool, refreshing waters. Vatu-i-Ra Island is a birdwatcher's heaven, home to Fiji's largest known breeding colony of black noddy seabirds. In addition to the black noddys, visitors will get to experience up close encounters with red-footed boobies, frigatebirds and tropicbirds in their natural surroundings

Waisali Rainforest Reserve and Vuadomo Waterfall	Savusavu	As one of the Heritage Trust Sites administered under the National Trust of Fiji, Waisali Rainforest Reserve is where visitors can hike and enjoy the wildlife including endemic species of trees and birds, particularly the spectacular orange dove (<i>Ptilinopus victor</i>) that breeds here. The Vuadomo waterfall is also a unique aspect of the region.
Sigatoka Sand Dunes National Park and Volivoli Cave	Sigatoka	Designated as Fiji's first national park, this area offers a rich combination of geomorphological, ecological, cultural and aesthetic attributes. Volivoli cave provides a glimpse into extinct species of Fiji, including crocodiles, large frogs, tortoises and giant iguanas. It also exhibits archaeological evidence into some of Fiji's prehistoric past and is full of Fiji's ancient history.
Mount Korobaba	Suva	Mount Korobaba showcases captivating flora and fauna and breath-taking views of the Suva peninsula from the summit.
Moon Reef	Tailevu	Moon Reef is the permanent residence for two pods of spinner dolphins. This is Fiji's first managed sight-seeing area tailored for dolphin watching.
Tavoro Waterfalls, Lake Tagimoucia, 180th Meridian and Rainbow Reef	Taveuni	Hiking to Tavoro waterfalls presents the opportunity for visitors to view the scenic wildlife of Taveuni and absorb the breath-taking views of the three waterfalls. Lake Tagimoucia is a crater lake 800m above sea level, home to the endemic flower the tagimoucia (<i>Medinilla waterhouse</i>), which is considered Fiji's national flower. This destination presents its own unique history. The 180th Meridian provides the unique attraction of allowing visitors to stand with one foot in either side of the World. The Rainbow reef is rated as one of the best dive sites in the world. One particularly remarkable feature of this reef system is the famous Great White Wall dive site, a steep underwater reef slope swathed with luminescent white soft corals.

(Source: Ministry of Industry, Trade and Tourism)

Notes

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