IFC, a member of the World Bank Group, is the largest global development institution focused exclusively on the private sector in developing countries.

IFC works with the private sector to create markets that open up opportunities for all by applying financial resources, technical expertise, global experience, and innovative thinking to help partners overcome financial, operational, and other challenges.

Since 1956, IFC has invested over US$2.8 billion in over 260 tourism projects in 89 countries with more than half of these investments in frontier countries. Currently, 45% of IFC’s tourism investment portfolio is in East Asia and the Pacific and 12% in South Asia.
IFC TOURISM ADVISORY ACTIVITIES IN FIJI

**Grow high value arrivals**
- IVS modernization and market research
- Identify high value markets and support focused marketing
- Develop products and marketing strategies with client
- Cruise economic impact assessment

**Increase value from tourism**
- Market sizing study for local and imported fresh produce
- Business case study for local sourcing
- Pilot Program with hotels to increase their local sourcing

**Investment**
- Build a pipeline of tourism investment leads
- Work with IFC’s Green Buildings team
- Benchmarking on aspirational competitor destinations
AGRITOURISM IS A GROWING MARKET

▪ Globally there is a trend towards agritourism driven by tourists seeking out culinary activities, knowledge of local cultures and participatory experiences.

▪ In Australia between 2011 and 2016, the number of domestic tourists who visited a farm on a holiday trip increased by 9% and the number of international tourists increased by 11%

9% increase in domestic tourist farm visits
11% increase in international tourist farm visits

1.8 million tourists visiting farms each year in Australia

Tourism Research Australia
AGRITOURISM GROWTH DRIVEN BY CULINARY TOURISM

- Spending by international tourists in 2017 in the food service channel was US$186.8 billion, the fourth largest spending category.

- Over 27% of global travellers say that they take the popularity of a destination’s food and drink into consideration when selecting a holiday destination.

There is potential to tap into this powerful market for the benefit of destinations and local businesses.
TYPES OF CULINARY TOURISTS

▪ **Culinary Travelers**: Travel for the expressed interest of participating in culinary experiences and enjoying a culture through its food and agriculture

▪ **Incidental culinary tourists**: Planned their trip for another reason but enjoy participating in culinary or agritourism experiences

▪ **Generation Z and Generation Y (Millennials)** are more likely to be culinary tourists

▪ **Domestic tourists are important**
  ▪ They want to know where their food is coming from
  ▪ As Fiji and Vanuatu continue to urbanise, this will increase

Baby Boomers: 19.1%
Gen X: 26.5%
Gen Z: 33.6%
Millennials: 33.5%

GlobalData
FOOD TOURISM MOTIVATIONS

Travellers are increasingly seeking authentic tourism experiences. Local food and agritourism help them better understand the culture of the destination.

Factors Impacting the Growth of Food Tourism

- Planning about local food and drink before they travel
  - 31% (1st)
  - 10% (2nd)
  - 17% (3rd)

- Encouraging unique food/drink experiences
  - 31% (1st)
  - 24% (2nd)
  - 10% (3rd)

- Food and travel are leading to more food travel
  - 7% (1st)
  - 24% (2nd)
  - 10% (3rd)
EXPERTS PREDICT THIS GROWTH WILL CONTINUE

Expected Growth in Agritourism and Culinary Tourism Activities

<table>
<thead>
<tr>
<th>Category</th>
<th>Large Increase</th>
<th>Moderate Increase</th>
<th>Slight Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Craft breweries</td>
<td>11</td>
<td>43</td>
<td>36</td>
</tr>
<tr>
<td>Craft distilleries (vodka, rum, spirits, etc.)</td>
<td>7</td>
<td>48</td>
<td>29</td>
</tr>
<tr>
<td>Cooking classes</td>
<td>10</td>
<td>41</td>
<td>28</td>
</tr>
<tr>
<td>Visits to fisheries or seafood/ocean experiences</td>
<td>10</td>
<td>35</td>
<td>45</td>
</tr>
<tr>
<td>Visits to working farms and orchards</td>
<td>17</td>
<td>41</td>
<td>21</td>
</tr>
</tbody>
</table>
### Regional Trends in Agritourism

**Australian Market - International Long Trip Travellers**

**Attitudes**
- **83.8%**: "I enjoy food from all over the world"
- **82.4%**: "I like to holiday where I can experience the local culture"
- **62%**: "I love to cook"

**Activities**
- **5%**: Nature holiday on their last holiday trip of 3+ nights
- **3%**: Fishing or hunting on their last holiday trip of 3+ nights
- **1.7%**: Farm stay on their last holiday trip of 3+ nights

*2018 Roy Morgan Custom Report*
LOCAL TRENDS: FIJI INTERNATIONAL VISITORS SURVEY

Activity Participation Rates 2017

- 28% Kava drinking
- 25% Village visits
- 14% Lovo
Destinations need to build a strong reputation for being a food culture including production, crafting, presentation and culinary aspects.

Satisfaction levels of experts on global food tourism:

- 41% Connecting visitors with locals through food and drink
- 26% Connecting visitors with agritourism or agriculture production
- 23% Promoting peace or understanding between cultures through food and drink
### Product Development Opportunities

<table>
<thead>
<tr>
<th>Category</th>
<th>Large Increase</th>
<th>Moderate Increase</th>
<th>Slight Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gourmet dining</td>
<td>10</td>
<td>35</td>
<td>31</td>
</tr>
<tr>
<td>Multi-day tours focus on food/drink</td>
<td>22</td>
<td>37</td>
<td>26</td>
</tr>
<tr>
<td>In-home experiences</td>
<td>24</td>
<td>31</td>
<td>28</td>
</tr>
<tr>
<td>Street food/food trucks</td>
<td>14</td>
<td>54</td>
<td>21</td>
</tr>
<tr>
<td>Active combo experiences</td>
<td>14</td>
<td>50</td>
<td>36</td>
</tr>
</tbody>
</table>

### How Businesses Can Improve Food Tourism

<table>
<thead>
<tr>
<th>Category</th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Somewhat agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residents needs to know more about local food &amp; drink traditions</td>
<td>31</td>
<td>31</td>
<td>28</td>
</tr>
<tr>
<td>Restaurants should teach visitors about food</td>
<td>21</td>
<td>41</td>
<td>28</td>
</tr>
<tr>
<td>Hospitality and tourism employees need to know more about local food &amp; drink traditions</td>
<td>66</td>
<td>21</td>
<td>10</td>
</tr>
</tbody>
</table>
TRENDING AGRITOURISM AND FOOD TOURISM PRODUCT OPPORTUNITIES

- Street food and markets
- Organic and ethical food
- Gourmet food
- Gastronomy tours by locals
  - Production to processing to dining
  - Increase in number of tours that are multiple day
- Home cooking and meal sharing
- Cooking lessons
- Innovative gastronomy

- Agritainment: farm mazes, petting farms, haunted houses, etc.
- Agrieducation: production, cultural traditions, rural values
- Nature based tourism: plant identification tours, medicinal plants, fishing, birdwatching
- Interactive production tours – hands on
- Festivals and events
- Handcraft processing tours
- Floriculture
IFC’S PROJECT ACTIVITIES
OPPORTUNITY TO INCREASE LOCAL FRESH PRODUCE SOURCED BY HOTELS IN FIJI

IFC, Ministry of Agriculture and MITT conducted a study to size the market for imported and local fresh produce sourced by Fiji’s hotels. The study found:

- 52% of all fresh produce sourced by hotels is imported with meat, dairy, seafood and vegetables key drivers of imports.

Opportunities exist to:

- Increase linkages between key decision makers in hotels, suppliers and farms
- Improve the consistency of locally grown produce to hotels and supplier business ethics
- Improve the amount and quality of locally grown produce, particularly in the off-growing season
- Be responsive to trends in the tourism market for more local food experiences
MARKETING LOCAL PRODUCE TO YOUR GUESTS

▪ Work with food and beverage and marketing teams to tell the story behind the local produce served in your hotel:
  ▪ Provide guests with a more authentic Fijian food experience
  ▪ Research and communicate stories of farmers, growing techniques, cooking methods, and cultural significance behind local fresh produce.

▪ Develop marketing materials to showcase local sourcing program.

▪ Develop programs to train staff on how to tell these stories and drive demand from guests for local food.

▪ Provide opportunities for chefs and customer-facing staff to learn more about how a product is made, grown or caught, and learn about the people and stories behind the product.
Fiji is reliant on the mid-range Australian and New Zealand markets.

To grow in a sustainable manner, Fiji needs to attract high yielding visitors through product development and marketing campaigns.

IFC is launching a pilot program to work with tour operators to develop tour products and marketing campaigns to increase the flow of high yielding visitors to Fiji.

Opportunities:
- Agritourism
- Culinary tourism
- Wellness tourism
- Expert-led, specialist tours
IFC's work in Fiji is guided by the Fiji Partnership. Australia and IFC are working together through the partnership to promote sustainable economic development, reduce poverty and stimulate private sector investment in Fiji.
2019 State of the Food Travel Industry Report, World Food Travel Association, January 31, 2019

Key Trends in Culinary Tourism: Insight into the key trends in culinary tourism, the profile of culinary travel and what the future holds for the industry, GlobalData, September 2018.

Fiji International Visitors Survey 2017 Provisional Results, Ministry of Industry, Trade and Tourism, February 2018
