BUŁA VINAKA!
OUR ROLE

As Fiji’s National Tourist Office (NTO), the roles of Tourism Fiji include:

- Marketing the destination / increase visitor arrivals into Fiji / ensure ROI for Govt
- Encouraging and assisting the industry to work together
- Providing quality research information
Historical Overview

Progress of Visitor Arrivals [1961 – 2020 (forecast)]

1987: Coups
1991: Gulf war
2000: Coup
2006: Coup
2009: Floods
2012: Cyclone Evan
2016: Cyclone Winston
2018 - 2020: 5% RBF Forecast

Source: Provisional 1961 to 2018 Visitor Arrivals
Fiji’s Visitor Arrival and Tourism Earnings 2011-2018

Visitor Arrivals

Tourism Earnings

RBF forecast 2017 - 2019
Visitor Arrivals (Average 5%)
Earnings (Average 5%)

FBoS Release No.2/2018, Provisional 2018 Visitor Arrivals
Fiji's Foreign Exchange Earnings: 2016 v 2017

Tourism: 1,924 m
Remittances: 533 m
Mineral Water: 541 m
Sugar: 1,936 m
Gold: 0 m
Fish: 0 m
Garments: 0 m
Timber: 0 m

Export Earnings
2016: 1,936 m
2017: 2,053 m
MARKET SHARE OF VISITORS BY COUNTRY 2018

Visitor Arrivals Release December 2018– Fiji Bureau of Statistics
MARKET SHARE OF VISITOR EARNINGS BY COUNTRY

2017

$1.9 billion

Source: Tourism Earnings Quarter 4 and 2017 Earnings – Fiji Bureau of Statistics
MARKET SHARE OF VISITORS BY PURPOSE OF VISIT 2018

HOLIDAY by Source Market

- Australia: 48%
- New Zealand: 24%
- NAM: 11%
- China: 5%
- Europe: 5%
- Others: 2%
- UK: 2%
- ROA: 2%
- Japan: 5%
- India: 5%
- Sin: 2%
VISITORS BY TYPE AND NICHE EXPERIENCES

Self-identified Backpackers (4%)
- Europe
- UK
- New Zealand
- Australia

Holidayers (76%)
- Rest/Relaxation (80%+)
- Wedding + Honeymooners (14%)
- Cultural experiences (1%)
- Diving (1%)

Travel Group
- Couples/partners (32%)
- Solo traveler (26%)
- Couple/single parent with children (15%)
- Group (9%)

Friends (9%)
- Other Family (9%)
- Business associates (2%)

International Visitor Survey Report 2015
SEASONALITY OF TRAVEL TO FIJI

Visitor Arrivals Release  2014 to 2018 - Fiji Bureau of Statistics
TOURISM FIJI KEY STRATEGIES

- Brand Value / Demand - Add value and distinctiveness to the Fiji tourism brand and positioning to increase awareness, appeal and active consideration
- World-Class Content - Develop best in market branded assets & content, delivered 365 days a year by implementing a highly targeted digital content marketing strategy
- Strategic Partners - Form strong, strategic global partnerships
- High Performing Events – Support and develop strategically aligned events (Event Funding Program)
- A Winning Team - Build and continue to develop organizational capabilities
- Engaged Stakeholders – strong relationships with industry, stakeholder bodies and our community
Strategic Direction

Improve Seasonality + Add value to the Brand = Long-term Success
Findings:

- **2017**
  - FJ $74.4 million is spent annually by hotels on fresh produce items, including fruits, vegetables, herbs, meats, dairy products and seafood

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
FROM FARM TO THE TOURIST’S TABLE

Findings:

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
### FROM FARM TO THE TOURIST’S TABLE

#### Vegetables: Demand by Tourist Area

<table>
<thead>
<tr>
<th>Tourist Area</th>
<th>Imported Produce</th>
<th>Local Produce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coral Coast</td>
<td>50% (1.21)</td>
<td></td>
</tr>
<tr>
<td>Nadi &amp; Lautoka</td>
<td>51% (0.49)</td>
<td>49% (0.47)</td>
</tr>
<tr>
<td>Denarau</td>
<td>35% (0.92)</td>
<td>65% (1.74)</td>
</tr>
<tr>
<td>Mamanuca &amp; Yasawa Islands</td>
<td>48% (1.15)</td>
<td>52% (1.23)</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
## Vegetables: Top 7 Vegetables by Import value

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>IMPORTED VOLUME IN KG</th>
<th>IMPORTED PRICE</th>
<th>TOTAL IMPORTED VALUE</th>
<th>POTENTIAL FOR INCREASED LOCAL PRODUCTION</th>
<th>LOCAL PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potato</td>
<td>477,551</td>
<td>$1.41</td>
<td>$673,347</td>
<td>Yes</td>
<td>$1.80</td>
</tr>
<tr>
<td>Colored capsicum (red, yellow, orange)</td>
<td>41,200</td>
<td>$13.70</td>
<td>$564,440</td>
<td>Yes</td>
<td>$11.00</td>
</tr>
<tr>
<td>Onion</td>
<td>270,353</td>
<td>$1.69</td>
<td>$456,897</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Carrot</td>
<td>168,331</td>
<td>$2.25</td>
<td>$378,745</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Capsicum (green)</td>
<td>30,202</td>
<td>$12.10</td>
<td>$365,445</td>
<td>Yes</td>
<td>$9.00</td>
</tr>
<tr>
<td>Broccoli</td>
<td>26,739</td>
<td>$13.40</td>
<td>$358,300</td>
<td>Yes</td>
<td>$10.00</td>
</tr>
<tr>
<td>Lettuce</td>
<td>26,690</td>
<td>$12.59</td>
<td>$336,030</td>
<td>Yes</td>
<td>$8.00</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
## FROM FARM TO THE TOURIST’S TABLE

### Fruits: Demand by Tourist Area

<table>
<thead>
<tr>
<th>Tourist Area</th>
<th>Imported Produce</th>
<th>Local Produce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coral Coast</td>
<td>27% 0.76</td>
<td>73% 2.01</td>
</tr>
<tr>
<td>Nadi &amp; Lautoka</td>
<td>84% 0.80</td>
<td>16% 0.16</td>
</tr>
<tr>
<td>Denarau</td>
<td>58% 1.95</td>
<td>42% 1.44</td>
</tr>
<tr>
<td>Mamanuca &amp; Yasawa Islands</td>
<td>33% 0.58</td>
<td>67% 1.18</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
### FROM FARM TO THE TOURIST’S

#### TABLE

<table>
<thead>
<tr>
<th>Produce</th>
<th>Imported Volume</th>
<th>Imported Price</th>
<th>Total Imported Value</th>
<th>Potential for Increased Local Production</th>
<th>Local Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tomato</td>
<td>110,380</td>
<td>$11.05</td>
<td>$1,219,701</td>
<td>Yes</td>
<td>$4.50</td>
</tr>
<tr>
<td>Orange</td>
<td>127,803</td>
<td>$4.11</td>
<td>$525,271</td>
<td>Yes, seasonal</td>
<td>$3.45</td>
</tr>
<tr>
<td>Apple</td>
<td>103,889</td>
<td>$4.42</td>
<td>$459,190</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Rock melon</td>
<td>33,349</td>
<td>$10.51</td>
<td>$350,494</td>
<td>Yes</td>
<td>$5.10</td>
</tr>
<tr>
<td>Honeydew melon</td>
<td>34,912</td>
<td>$9.72</td>
<td>$339,348</td>
<td>Yes</td>
<td>$6.50</td>
</tr>
<tr>
<td>Avocado</td>
<td>12,890</td>
<td>$15.59</td>
<td>$200,950</td>
<td>Yes, seasonal</td>
<td>$6.00</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
FROM FARM TO THE TOURIST’S TABLE

Meat, Poultry and Seafood: Demand by Tourist Area

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
FROM FARM TO THE TOURIST’S TABLE

Meat, Poultry and Seafood: Top 5 meat and seafood items by import value

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>IMPORTED VOLUME</th>
<th>IMPORTED PRICE (FJD PER KG)</th>
<th>TOTAL IMPORTED VALUE (FJD)</th>
<th>POTENTIAL FOR INCREASED LOCAL PRODUCTION</th>
<th>LOCAL PRICE (FJD PER KG)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>221,582</td>
<td>$32.00</td>
<td>$7,090,629</td>
<td>Yes</td>
<td>$17.00</td>
</tr>
<tr>
<td>Prawns</td>
<td>92,922</td>
<td>$32.00</td>
<td>$2,973,490</td>
<td>Yes</td>
<td>$35.00</td>
</tr>
<tr>
<td>Lamb</td>
<td>170,758</td>
<td>$16.00</td>
<td>$2,732,125</td>
<td>No</td>
<td>N/A</td>
</tr>
<tr>
<td>Bacon</td>
<td>130,868</td>
<td>$20.00</td>
<td>$2,617,351</td>
<td>Yes</td>
<td>$18.00</td>
</tr>
<tr>
<td>Fish</td>
<td>26,468</td>
<td>$31.00</td>
<td>$820,523</td>
<td>No</td>
<td>$16.50</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
FROM FARM TO THE TOURIST’S TABLE

Dairy: Demand by Tourist Area

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
## FROM FARM TO THE TOURIST’S TABLE

Dairy: Top 4 Dairy products by import value

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>IMPORTED VOLUME</th>
<th>IMPORTED PRICE</th>
<th>TOTAL IMPORTED VALUE</th>
<th>POTENTIAL FOR INCREASED LOCAL PRODUCTION</th>
<th>LOCAL PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheese</td>
<td>189,851</td>
<td>$24.00</td>
<td>$4,556,413</td>
<td>Yes</td>
<td>$15.50</td>
</tr>
<tr>
<td>Butter</td>
<td>134,118</td>
<td>$21.50</td>
<td>$2,883,531</td>
<td>No</td>
<td>$17.40</td>
</tr>
<tr>
<td>Milk</td>
<td>413,036</td>
<td>$2.10</td>
<td>$867,375</td>
<td>Yes</td>
<td>$2.20</td>
</tr>
<tr>
<td>Cream</td>
<td>73,426</td>
<td>$9.50</td>
<td>$697,546</td>
<td>No</td>
<td>$6.40</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
# FROM FARM TO THE TOURIST’S TABLE

Herbs: Demand by Tourist Area

<table>
<thead>
<tr>
<th>Tourist Area</th>
<th>FJD Thousands</th>
<th>Imported Produce</th>
<th>Local Produce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coral Coast</td>
<td>63% 118,920</td>
<td>37% 69,109</td>
<td></td>
</tr>
<tr>
<td>Nadi &amp; Lautoka</td>
<td>79% 134,908</td>
<td>21% 34,958</td>
<td></td>
</tr>
<tr>
<td>Denarau</td>
<td>69% 369,609</td>
<td>31% 166,556</td>
<td></td>
</tr>
<tr>
<td>Mamanuca &amp; Yasawa</td>
<td>74% 193,966</td>
<td>26% 69,256</td>
<td></td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
# FROM FARM TO THE TOURIST’S TABLE

**Herbs: Top 5 Herbs by import value**

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>IMPORTED VOLUME</th>
<th>IMPORTED PRICE</th>
<th>TOTAL IMPORTED VALUE</th>
<th>POTENTIAL FOR INCREASED LOCAL PRODUCTION</th>
<th>LOCAL PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rosemary</td>
<td>995</td>
<td>$91.67</td>
<td>$91,195</td>
<td>Yes</td>
<td>$60.00</td>
</tr>
<tr>
<td>Chives</td>
<td>868</td>
<td>$91.67</td>
<td>$79,559</td>
<td>Yes</td>
<td>$40.00</td>
</tr>
<tr>
<td>Parsley curly</td>
<td>1,556</td>
<td>$26.58</td>
<td>$41,347</td>
<td>Yes</td>
<td>$21.50</td>
</tr>
<tr>
<td>Pepper *</td>
<td>852</td>
<td>$29.00</td>
<td>$24,710</td>
<td>Yes</td>
<td>$ --</td>
</tr>
<tr>
<td>Parsley flat</td>
<td>683</td>
<td>$33.00</td>
<td>$22,539</td>
<td>Yes</td>
<td>$27.50</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
## FROM FARM TO THE TOURIST’S TABLE

### KEY BARRIERS

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lack of networking between key decision-makers in hotels and local producers and suppliers</td>
</tr>
<tr>
<td>2</td>
<td>Inconsistent supply (particularly fruits, vegetables, seafood and dairy products)</td>
</tr>
<tr>
<td>3</td>
<td>Seasonality of produce available locally (particularly fruits and vegetables)</td>
</tr>
<tr>
<td>4</td>
<td>Poor quality of products (particularly meat, seafood and dairy products)</td>
</tr>
<tr>
<td>5</td>
<td>Lack of food safety standards for meat and seafood</td>
</tr>
</tbody>
</table>

Source: From the Farm to the Tourist’s Table: A Study of Fresh Produce Demand from Fiji’s Hotels and Resorts (2018)
### FROM FARM TO THE TOURIST’S TABLE

Summary of Findings and Recommendations

Potential for Fiji to cut **$24 million** of its fresh produce import bill

**Import Bill**

- **63%** of total fresh produce imports (18 items) consumed by hotels in Fiji’s main tourism areas

1. **Vegetables**
   - potato, colored capsicum (red/yellow/orange), green capsicum, broccoli, lettuce, cauliflower, zucchini, purple cabbage, green cabbage.

2. **Fruits**
   - tomato, orange, rock melon and honeydew melon

3. **Meat + Seafood**
   - beef, bacon and prawns

4. **Dairy**
   - Cheese

5. **Juice**
   - packaged tropical juices

Source: From the Farm to the Tourist’s Table: A *Study of Fresh Produce Demand from Fiji’s Hotels and Resorts* (2018)
# A 5-Star Hotel’s Monthly Consumption of Fresh Produce

## Top Local Produce by Approx. Volume

### Root crops
- **Cassava** (900 kg)
- **Potatoes** (625 kg) - import
- **Dalo** (250 kg)
- **Kumala – purple** (185 kg)
- **Kumala – white** (125 kg)

### Fruits
- **Watermelon** (3250 kg)
- **Pineapples** (4000 kg)
- **Pawpaw** (1950 kg)
- **Lime** (1006 kg)

### Vegetables
- **Tomatoes** (1300 kg)
- **Cucumber** (400 kg)
- **Capsicum – green** (350 kg)
- **Lettuce – Cos** (250 kg)
- **English Cabbage** (240 kg)
- **Zucchini** (192 kg) - both
- **Cauliflower** (165 kg) – both
- **Chinese cabbage** (125 kg)
- **Eggplant** (125 kg)

### Herbs + Spices
- **Dhania** (82 kg)
- **Mint** (75 kg)
- **Rosemary** (30 kg)

### Meat/Poultry
- **Chicken** (2500 kg)
- **Eggs** (2235 trays)
- **Pork** (1800 kg)
- **Beef** (3100 kg) - import
VINAKA VAKALEVU