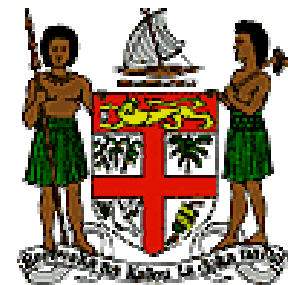


Ministry Public Enterprises, Communications, Civil Aviation & Tourism

Opportunities from Global Changes Ministry of Tourism Perspective

**Backpacker-Independent Traveller-
Youth Industry Forum 2011**

24 June 2011



Key points

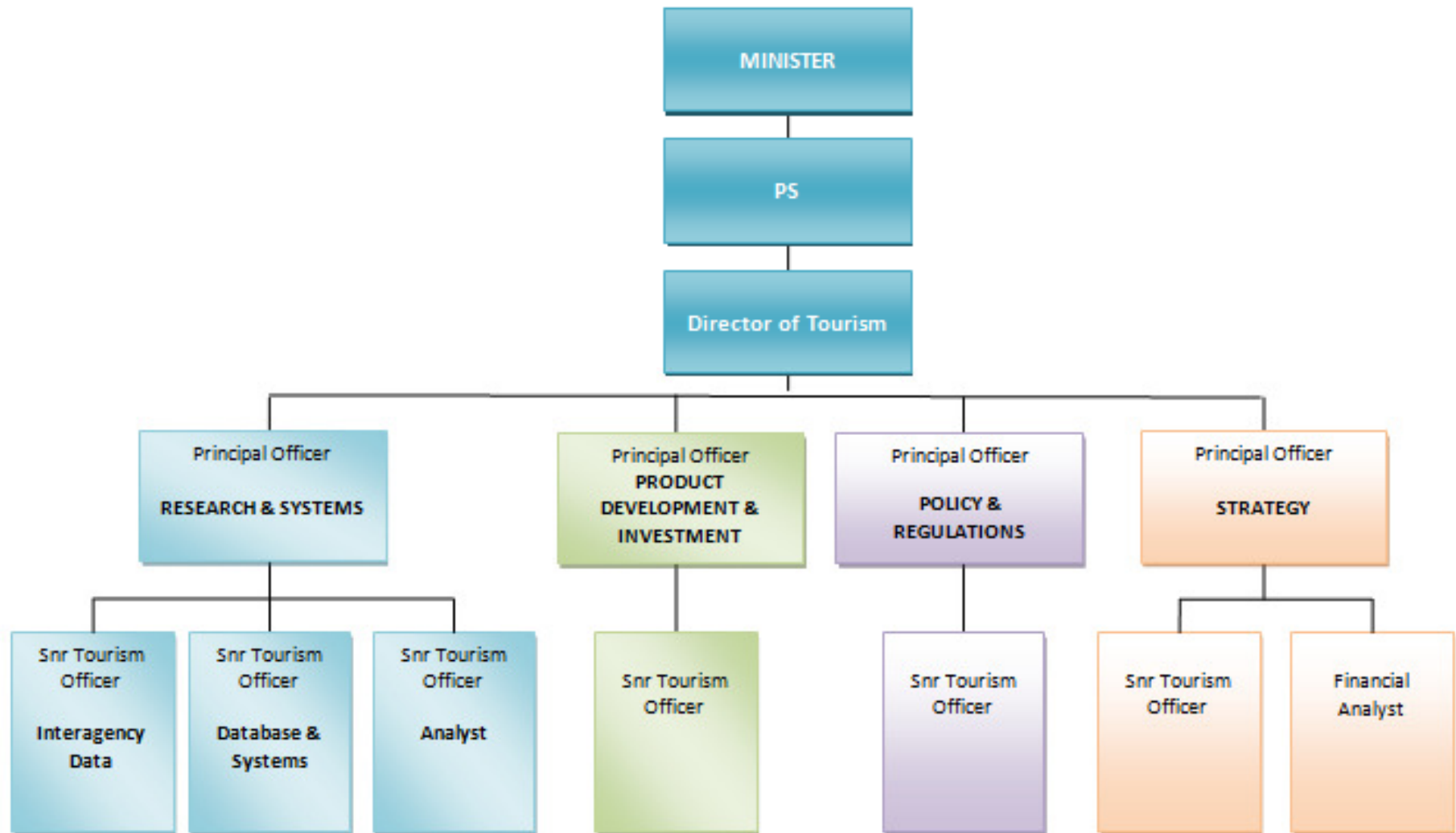
Macro national perspective

- Government direction
- Changes locally & globally
- Select opportunities as they relate to FBA

Commitment to tourism

- Since 2009 Bainimara Government – \$23.5m annual investment in marketing through Tourism Fiji plus \$3.0m operations
- Laws – Nadi River, Surfing, Super Yachts etc
- Airport upgrades
 - Labasa, Rotuma, Matuku etc.
 - Nausori and Nadi
- Rural roads – King's, Hibiscus Highway, Sigatoka Valley
- Internal reorganization

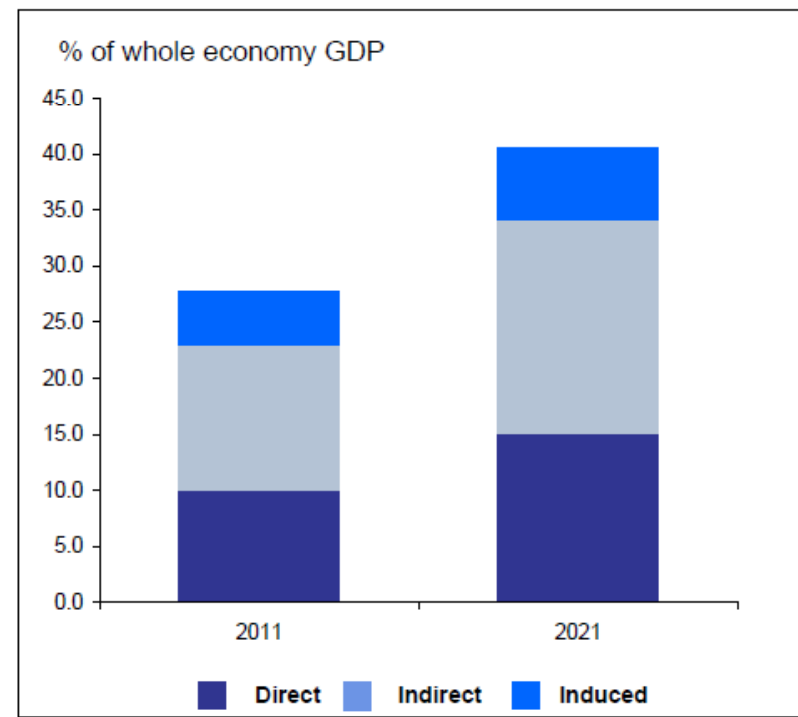
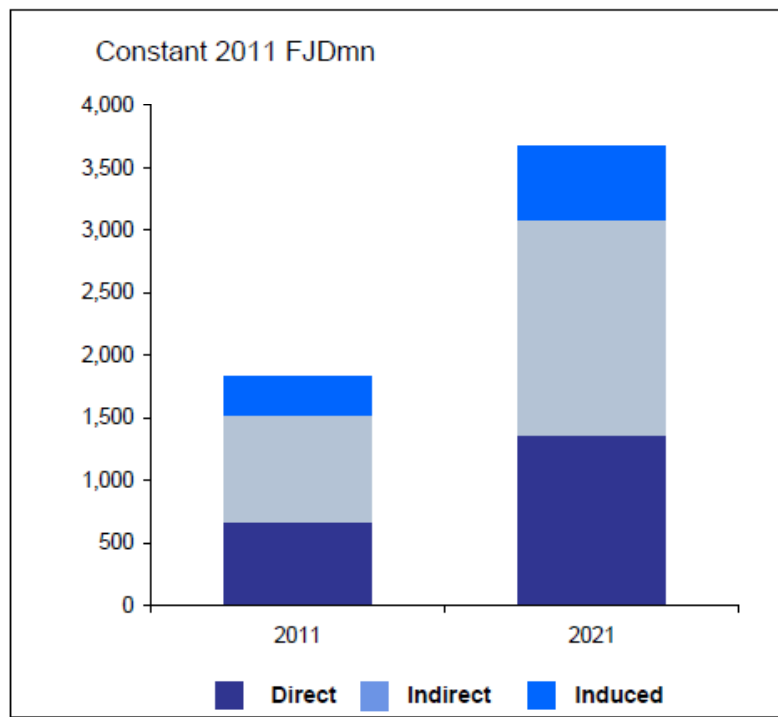
Ministry changes



Local changes

Contribution to GDP – forecast 2011 FJD 1.8b 27.8% ⇒
2021 FJD 3.7b 40.6% (WTTC)

Fiji: Total Contribution of Travel & Tourism to GDP



Global travel changes

- GFC bottomed out, recovery 2010 v 2009 (ITB World Travel Trends 10/11)
 - +7% # trips and +5% # nights (trips ↑ ALOS ↓)
 - +7% revenue
 - Outbound
 - Low growth Europe & NAM
 - Double-digit Asia and South America
- Growth 2011 +4.5% international arrivals (UNWTO)
- 2020 Asia residents (Oxford Economics/Amadeus)
 - 22% of global arrivals
 - 32% travel spending

Global changes & Fiji backpacker sector opportunities - INTERNET

Full Year 2010

Reservation Sources for Major Hotel Brands

CRS Hotel Bookings	Share of CRS Reservations Q4 2010	Share of CRS Reservations Q4 2009	Percent Growth/Decline Q4 2010 to Q4 2009
Internet	52.3%	50.4%	1.9%
GDS Travel Agent	22.1%	21.3%	0.8%
Total Electronic	74.4%	71.7%	2.7%
Voice	25.6%	28.3%	-2.7%
Total for CRSs	100.0%	100.0%	0.0%

Internet Source Breakdown for Major Hotel Brands

Internet Bookings	Share of Internet CRS Reservations Q2 2010
Brand Sites (1)	67.3%
Retail Sites (2)	4.0%
Merchant Sites (3)	16.5%
Opaque Sites (4)	12.2%
Total Internet	100.0%

<http://www.fiji-backpacking.com/index.php>

Own sites

Booking engine

Multi language

\$12,300 budget

MOBILE DEVICES, CONVERGENCE

- 2015 European travellers using smartphones to make reservation > 50% (Euromonitor, 2010 World Travel Trends Report)
- # people using smartphones to research & book travel ↑ exponentially est. 2012 in US, 31-34% of smartphone & mobile internet users research & book travel via mobile devices (eMarketer.com)
- Government liberalization of telecommunications in Fiji
 - ↑ network coverage and access, ↓ biz costs, national Broadband Policy befor YE 2011

<http://www.fiji-backpacking.com/index.php>

Update & revise, increase content & pages

EXPERIENTIAL HOLIDAYS

- Seek experience: cultural, natural, niche
- Deprivation holidays NAM – boot camp vacation for physical and mental transformations
- Government increased resource allocation to data collection and analysis

<http://www.fiji-backpacking.com/index.php>

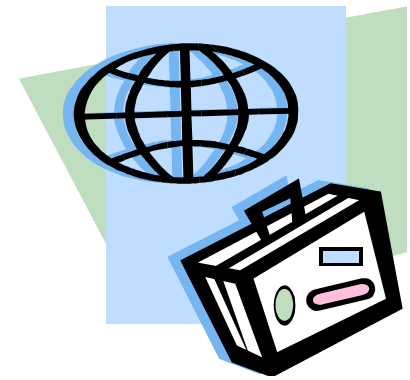
Emphasis on experience, activities, multicultural

Multiple languages

Opportunities with Global Changes

Capitalize on internet, mobile devices and increasing focus on experiential travel

- Most cost-effective use of resources
 - Association website
 - Hotel or resort sites
 - Online booking engine
 - Frequently updated & deeper content with experiential & multi-cultural emphasis
- Government positioning Fiji tourism for current & future changes
 - FIBA change to FBA



2011 Forum

- Program
 - Marketing – Tourism Fiji
 - Customer profile – Mr Jarvis
 - Pricing and air travel – Air Pacific
 - Online marketing & reservations - Webmedia
- Open

