

Data Driven Insights: Understanding Travel Behaviour and Demand in Key Fijian Source Markets

Select research findings from the 2021 - 2022 Fiji Tourism Data Insights Dashboard

Workshop #4 – Brand Health Data (April 2022)



MINISTRY OF
COMMERCE, TRADE,
TOURISM AND
TRANSPORT



FIJI TOURISM DATA INSIGHTS DASHBOARD: IDENTIFYING FIJI'S COMPETITIVE ADVANTAGE

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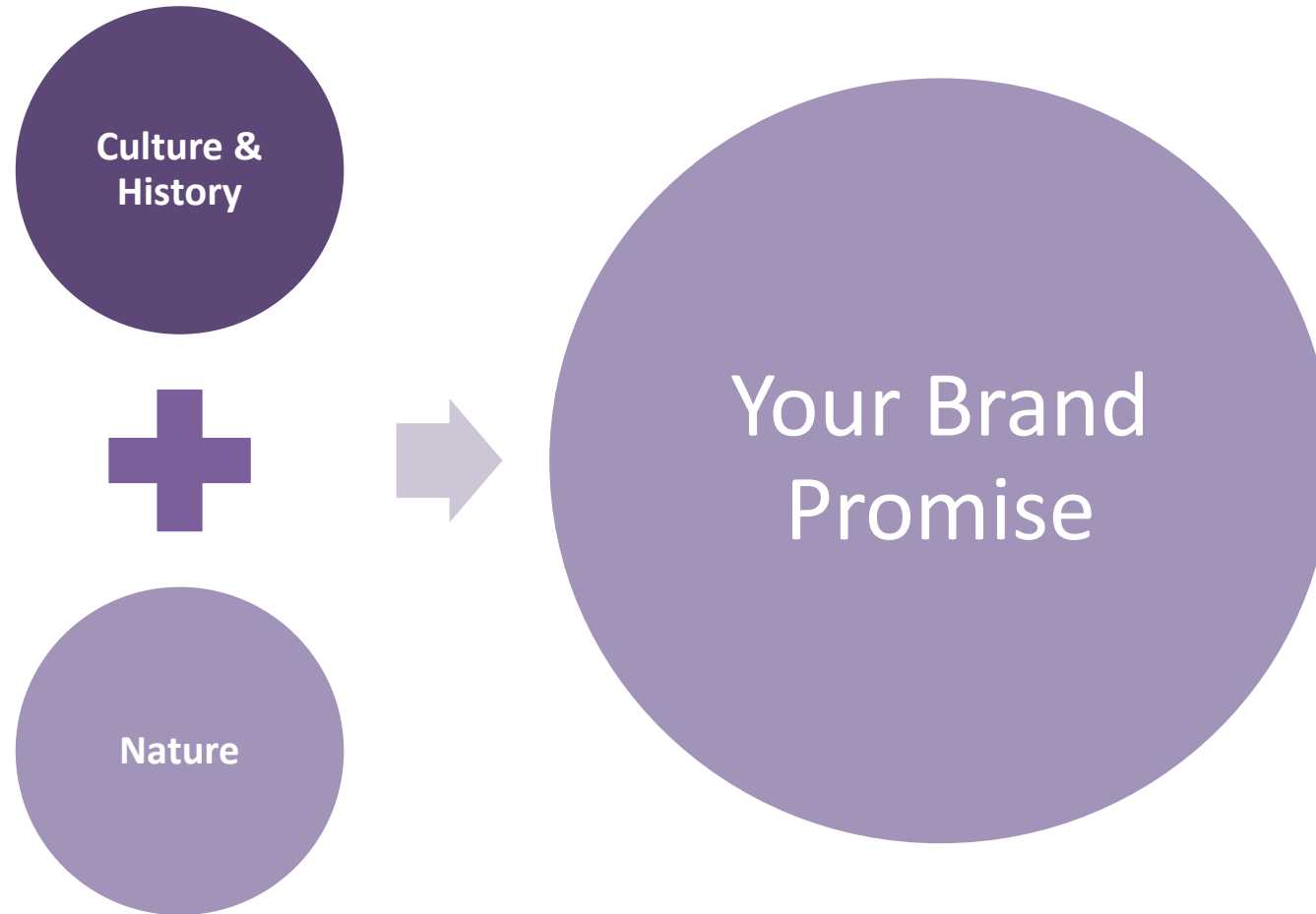
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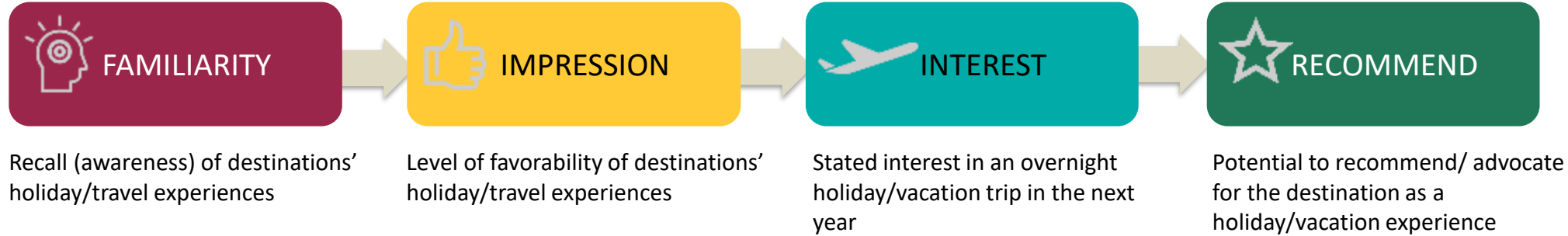
60%
**OF THE DECISION TO TRAVEL
TO A DESTINATION IS DRIVEN
BY THE TOURISM BRAND**

WHAT ARE FIJI'S DESTINATION APPEALS?



DESTINATION BRANDS CAN BE MEASURED VIA MYRIAD VARIABLES LINKED TO THE TRAVEL CONSUMER PATH-TO-PURCHASE

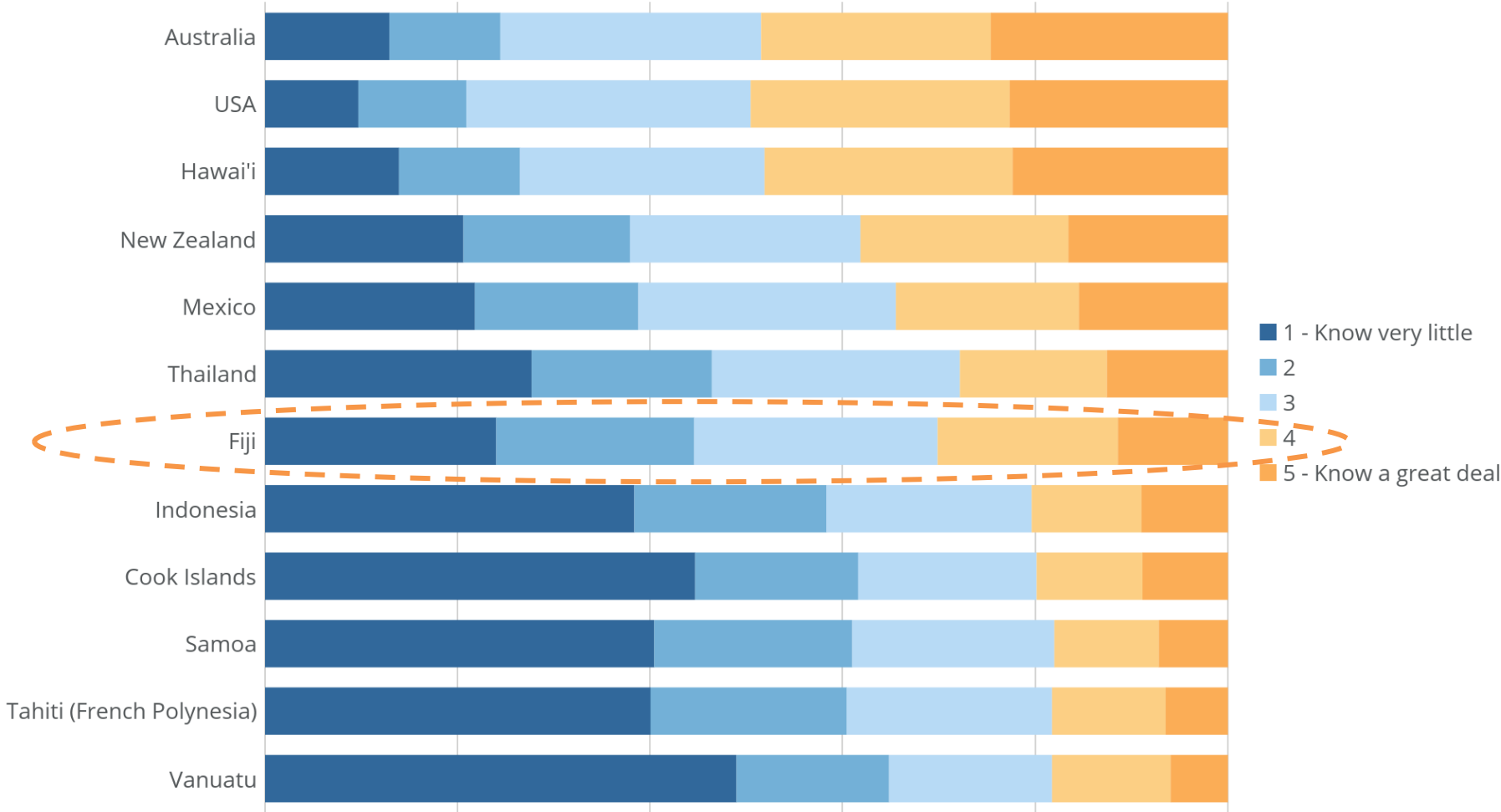
MEASURING FIJI'S DESTINATION BRAND HEALTH



- We asked a series of prompted questions focused on Fiji and a set of specific competitors: Australia, Hawai'i, NZ, USA, Mexico, Thailand, Tahiti, Cook Islands, Indonesia, Samoa, Vanuatu.
- Taken together, these four questions are a basket of measures to evaluate the overall brand health of the destination.
- Note: The data is based on a quantitative survey of statistically, representative samples of identified travel consumers (n=1000 benchmark survey; n=100 monthly tracking surveys) in each of the US, Australia and New Zealand.

Q10. HOW FAMILIAR ARE YOU WITH THE TOURISM EXPERIENCES THE FOLLOWING DESTINATIONS HAVE TO OFFER?

TOTAL US, AUSTRALIA, NZ TRAVEL CONSUMERS; DEC 1, 2021 - MAR 31, 2022



22.4% - Hawaii
11.4% - Fiji
6.5% - Tahiti

Q10. HOW FAMILIAR ARE YOU WITH THE TOURISM EXPERIENCES THE FOLLOWING DESTINATIONS HAVE TO OFFER?

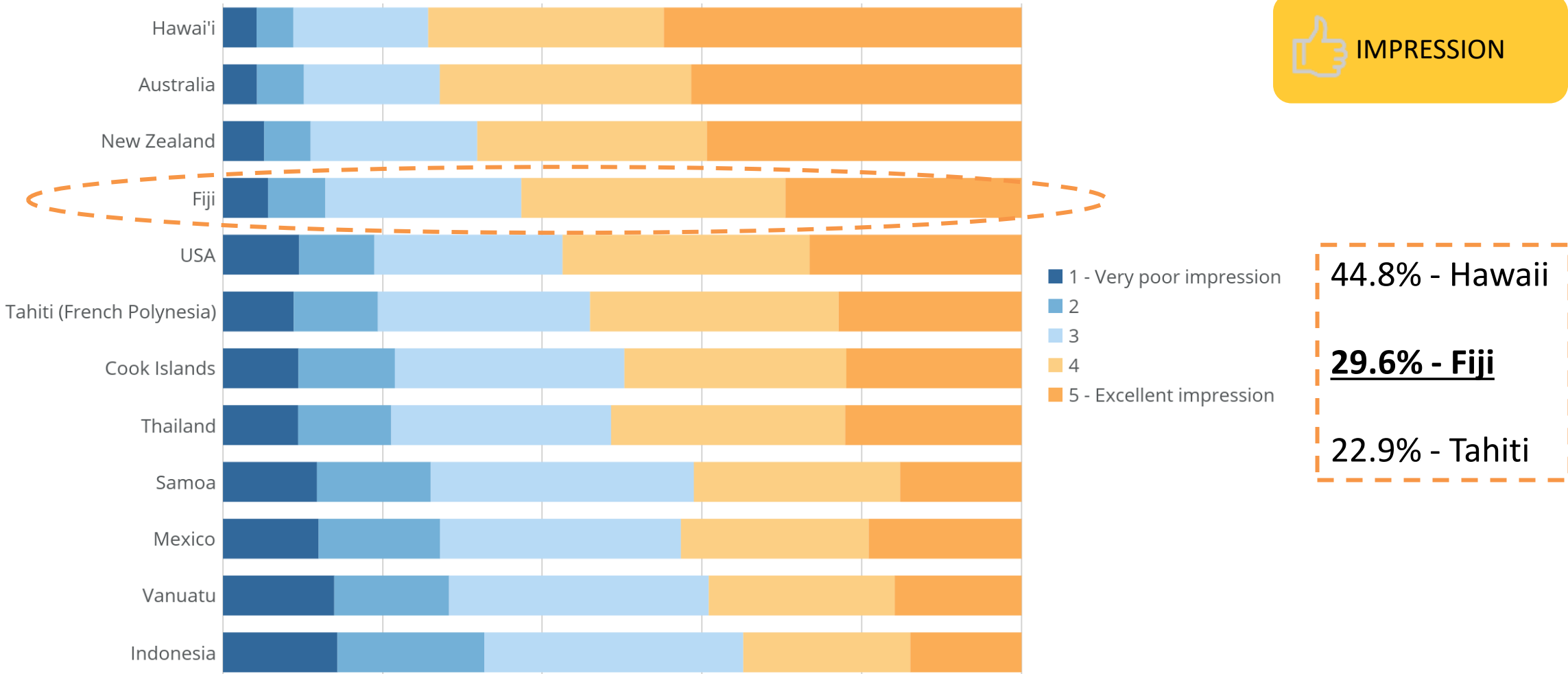
TOTAL US, AUSTRALIA, NZ TRAVEL CONSUMERS; DEC 1, 2021 - MAR 31, 2022 – Mean Scores (5-point scale)



Response	Monthly Response				Mean Response		Change
Hawai'i	3.4 2021-Dec	3.2 2022-Jan	3.1 2022-Feb	3.2 2022-Mar	3.2	▼	-0.2
USA	3.4 2021-Dec	3.5 2022-Jan	3.4 2022-Feb	3.5 2022-Mar	3.4	▲	0.1
Australia	3.3 2021-Dec	3.5 2022-Jan	3.4 2022-Feb	4.2 2022-Mar	3.6	▲	1.0
Mexico	3.0 2021-Dec	2.7 2022-Jan	2.6 2022-Feb	2.3 2022-Mar	2.7	▼	-0.7
New Zealand	2.9 2021-Dec	3.1 2022-Jan	3.1 2022-Feb		3.0	▲	
Fiji	2.7 2021-Dec	2.8 2022-Jan	2.8 2022-Feb	3.2 2022-Mar	2.9	▲	0.5
Thailand	2.6 2021-Dec	2.7 2022-Jan	2.7 2022-Feb	2.7 2022-Mar	2.7	▲	0.0
Indonesia	2.3 2021-Dec	2.4 2022-Jan	2.4 2022-Feb	2.3 2022-Mar	2.3	▼	-0.0
Tahiti (French Polynesia)	2.3 2021-Dec	2.1 2022-Jan	2.2 2022-Feb	2.1 2022-Mar	2.2	▼	-0.2
Samoa	2.2 2021-Dec	2.3 2022-Jan	2.3 2022-Feb	2.6 2022-Mar	2.3	▲	0.4
Cook Islands	2.2 2021-Dec	2.3 2022-Jan	2.3 2022-Feb	2.7 2022-Mar	2.4	▲	0.6
Vanuatu	2.1 2021-Dec	2.1 2022-Jan	2.2 2022-Feb	2.5 2022-Mar	2.2	▲	0.4

Q12. WHAT IS YOUR IMPRESSION OF WHAT THE FOLLOWING DESTINATIONS HAVE TO OFFER AS HOLIDAY/VACATION TRAVEL EXPERIENCES?

TOTAL US, AUSTRALIA, NZ TRAVEL CONSUMERS; DEC 1, 2021 - MAR 31, 2022



Q12. WHAT IS YOUR IMPRESSION OF WHAT THE FOLLOWING DESTINATIONS HAVE TO OFFER AS HOLIDAY/VACATION TRAVEL EXPERIENCES?

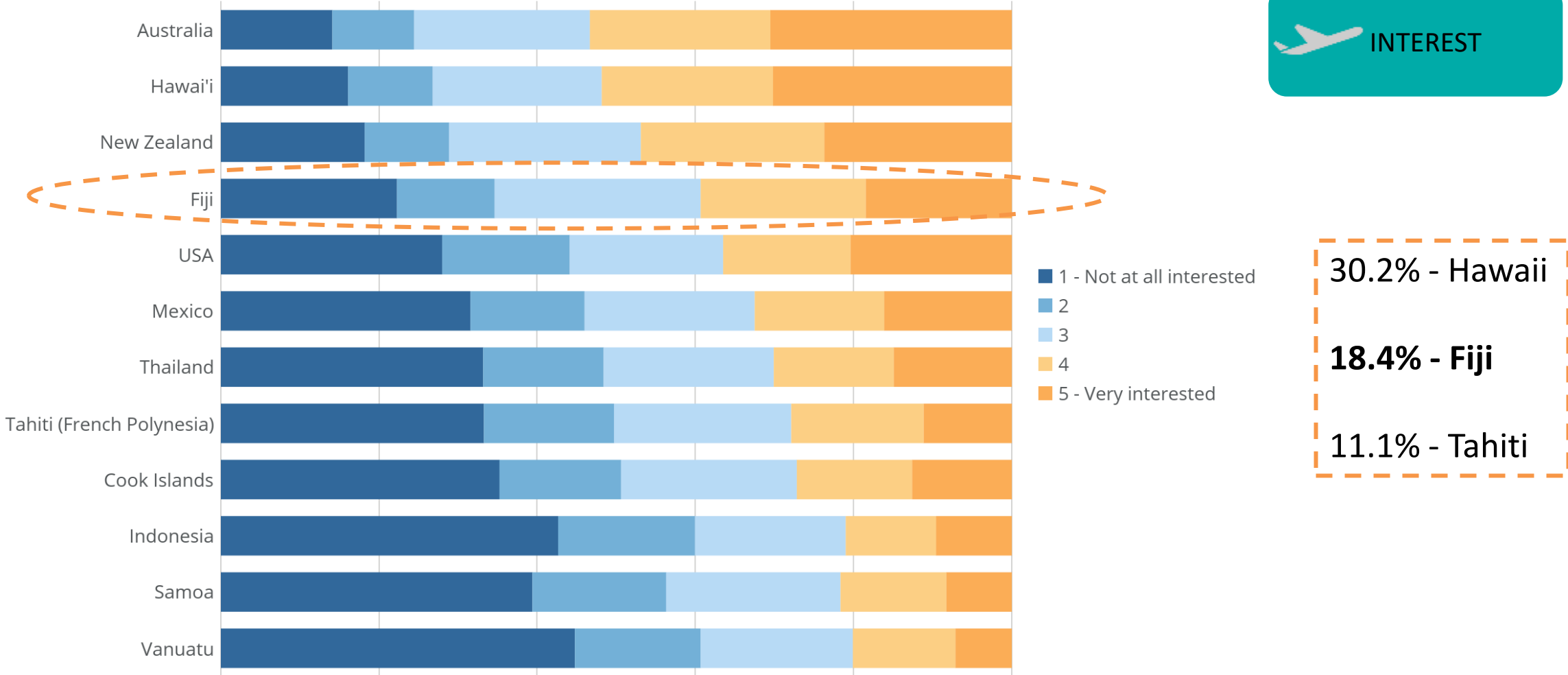
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Response	Monthly Response				Mean Response	Change	
Hawai'i	4.1 2021-Dec	4.0 2022-Jan	3.9 2022-Feb	3.9 2022-Mar	4.0	▼	-0.2
Australia	4.0 2021-Dec	4.0 2022-Jan	4.0 2022-Feb	4.2 2022-Mar	4.0	▲	0.2
New Zealand	3.9 2021-Dec	3.9 2022-Jan	3.9 2022-Feb		3.9	▲	0.0
Fiji	3.7 2021-Dec	3.7 2022-Jan	3.7 2022-Feb	3.9 2022-Mar	3.8	▲	0.1
USA	3.7 2021-Dec	3.5 2022-Jan	3.4 2022-Feb	3.5 2022-Mar	3.5	▼	-0.1
Tahiti (French Polynesia)	3.5 2021-Dec	3.5 2022-Jan	3.4 2022-Feb	3.6 2022-Mar	3.5	▲	0.1
Thailand	3.4 2021-Dec	3.3 2022-Jan	3.4 2022-Feb	3.5 2022-Mar	3.4	▲	0.1
Cook Islands	3.4 2021-Dec	3.5 2022-Jan	3.4 2022-Feb	3.7 2022-Mar	3.5	▲	0.3
Mexico	3.3 2021-Dec	3.1 2022-Jan	3.1 2022-Feb	3.0 2022-Mar	3.1	▼	-0.3
Samoa	3.2 2021-Dec	3.1 2022-Jan	3.2 2022-Feb	3.5 2022-Mar	3.2	▲	0.3
Vanuatu	3.1 2021-Dec	3.2 2022-Jan	3.1 2022-Feb	3.3 2022-Mar	3.2	▲	0.2
Indonesia	3.0 2021-Dec	3.1 2022-Jan	2.9 2022-Feb	3.0 2022-Mar	3.0	▼	-0.0

Q11. HOW INTERESTED ARE YOU TO TRAVEL TO EACH OF THESE DESTINATIONS DURING 2022?

TOTAL US, AUSTRALIA, NZ TRAVEL CONSUMERS; DEC 1, 2021 - MAR 31, 2022



Q11. HOW INTERESTED ARE YOU TO TRAVEL TO EACH OF THESE DESTINATIONS DURING 2022?

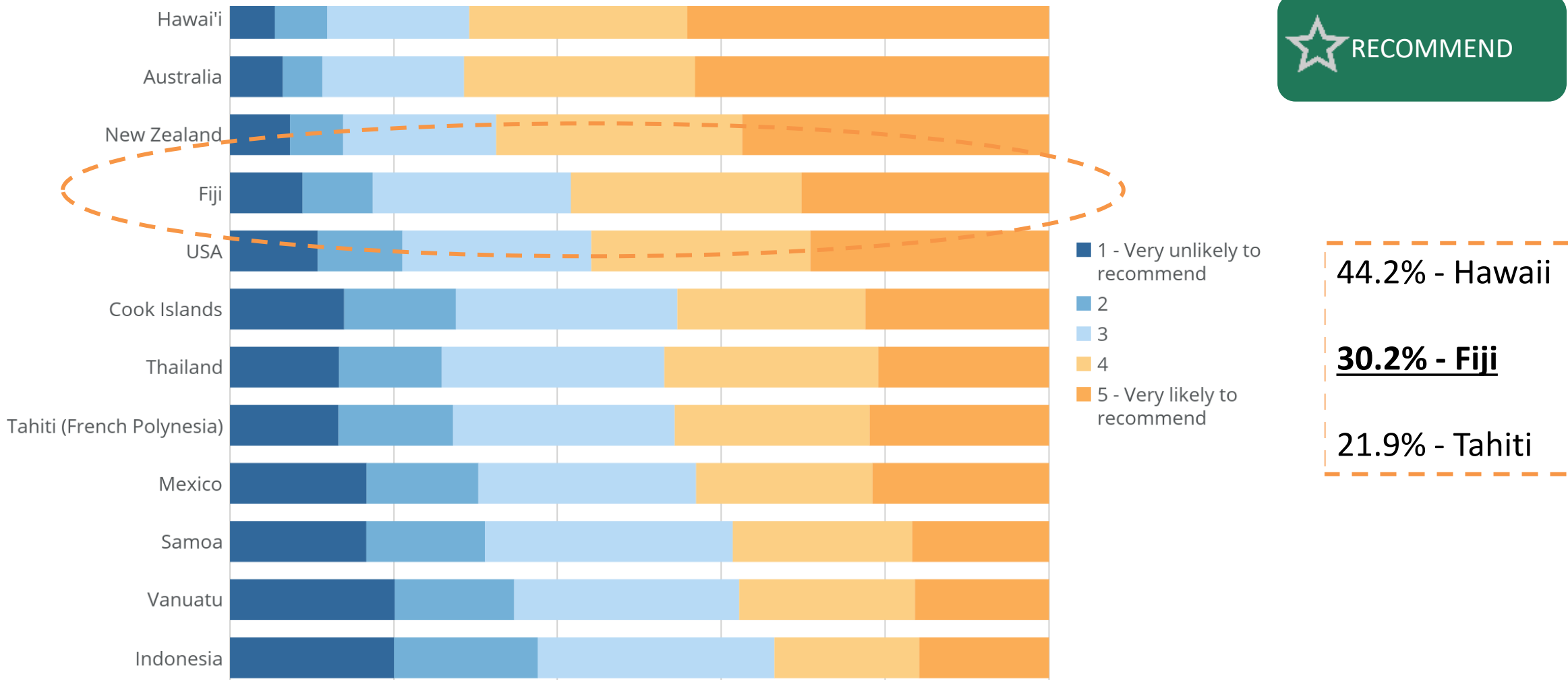
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Response	Monthly Response				Mean Response		Change
Hawai'i	3.5 2021-Dec	3.1 2022-Jan	3.1 2022-Feb	2.9 2022-Mar	3.2	▼	-0.7
Australia	3.5 2021-Dec	3.3 2022-Jan	3.4 2022-Feb	3.8 2022-Mar	3.5	▲	0.4
New Zealand	3.2 2021-Dec	3.3 2022-Jan	3.1 2022-Feb		3.2	▲	
Fiji	3.1 2021-Dec	2.9 2022-Jan	2.9 2022-Feb	2.9 2022-Mar	2.9	▼	-0.2
USA	3.0 2021-Dec	2.7 2022-Jan	2.7 2022-Feb	2.7 2022-Mar	2.8	▼	-0.4
Mexico	2.8 2021-Dec	2.5 2022-Jan	2.5 2022-Feb	2.1 2022-Mar	2.5	▼	-0.7
Thailand	2.7 2021-Dec	2.7 2022-Jan	2.6 2022-Feb	2.3 2022-Mar	2.6	▼	-0.4
Tahiti (French Polynesia)	2.6 2021-Dec	2.4 2022-Jan	2.4 2022-Feb	2.3 2022-Mar	2.4	▼	-0.4
Cook Islands	2.5 2021-Dec	2.6 2022-Jan	2.6 2022-Feb	2.9 2022-Mar	2.6	▲	0.4
Samoa	2.4 2021-Dec	2.2 2022-Jan	2.3 2022-Feb	2.5 2022-Mar	2.3	▲	0.1
Indonesia	2.3 2021-Dec	2.2 2022-Jan	2.2 2022-Feb	2.0 2022-Mar	2.2	▼	-0.3
Vanuatu	2.2 2021-Dec	2.2 2022-Jan	2.3 2022-Feb	2.2 2022-Mar	2.2	▼	-0.0

Q13. HOW LIKELY, IF AT ALL, WOULD YOU BE TO RECOMMEND THE FOLLOWING TOURISM DESTINATIONS?

TOTAL US, AUSTRALIA, NZ TRAVEL CONSUMERS; DEC 1, 2021 - MAR 31, 2022



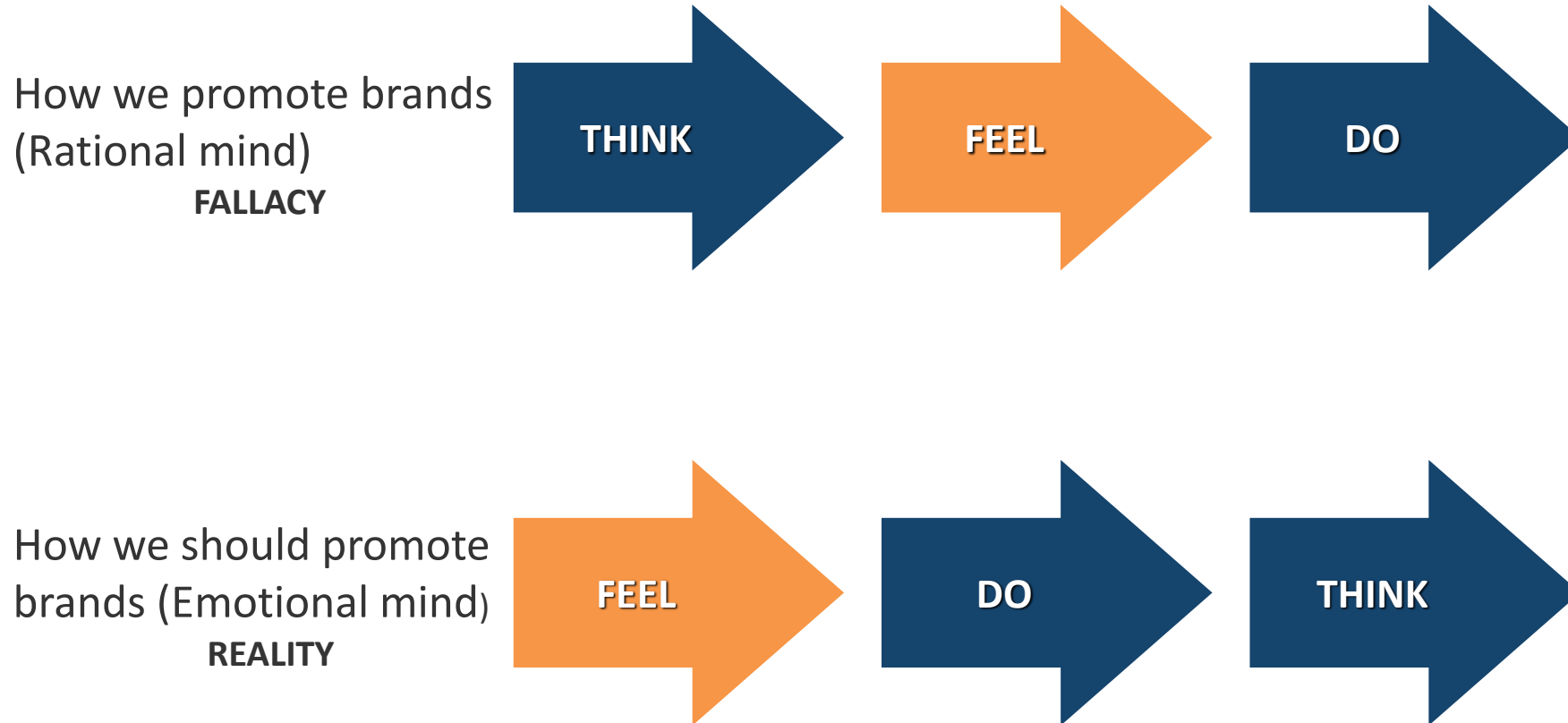
Q13. HOW LIKELY, IF AT ALL, WOULD YOU BE TO RECOMMEND THE FOLLOWING TOURISM DESTINATIONS?

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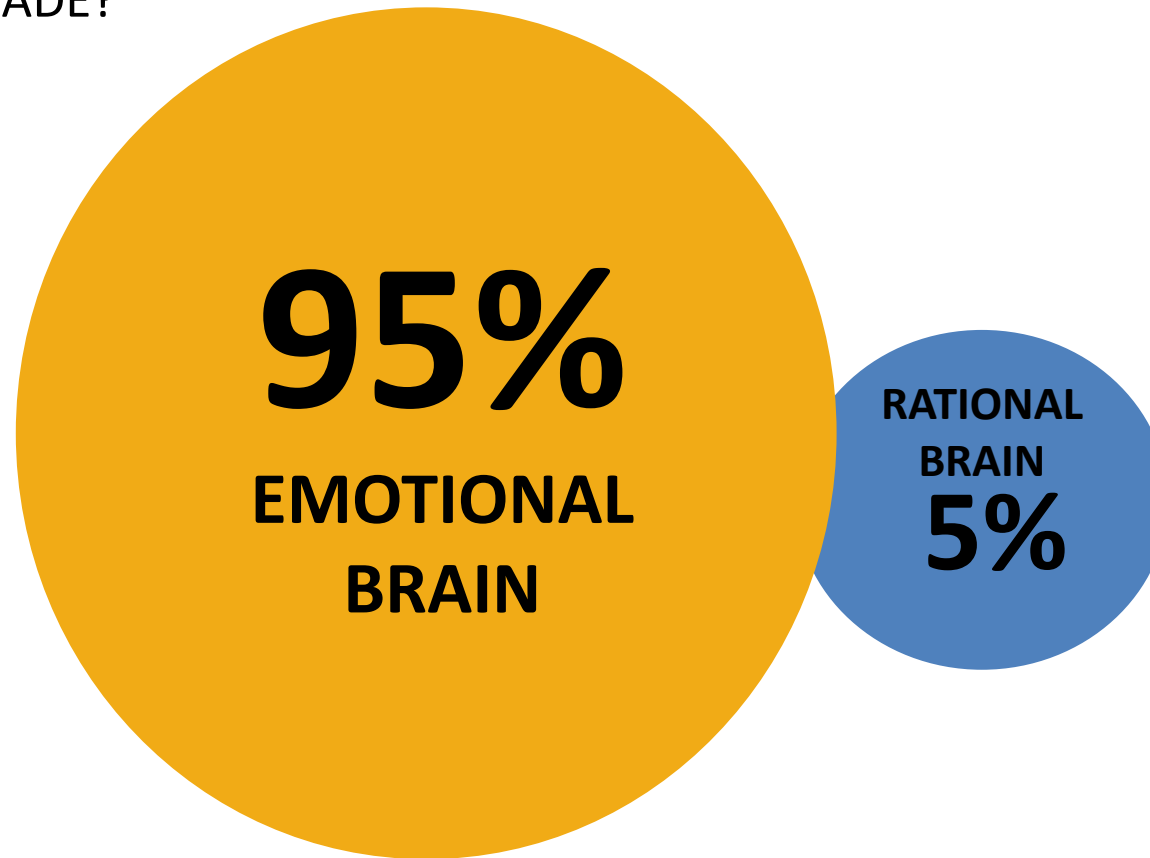
Response	Monthly Response				Mean Response	Change	
Australia	4.3 2022-Mar	4.0 2021-Dec	4.0 2022-Feb	3.9 2022-Jan	4.0	▼	-0.4
Hawai'i	3.8 2022-Mar	4.1 2021-Dec	3.8 2022-Feb	3.9 2022-Jan	3.9	▲	0.1
New Zealand		3.8 2021-Dec	3.9 2022-Feb	3.9 2022-Jan	3.9	▲	0.1
Fiji	3.7 2022-Mar	3.6 2021-Dec	3.6 2022-Feb	3.6 2022-Jan	3.6	▼	-0.1
Cook Islands	3.7 2022-Mar	3.2 2021-Dec	3.3 2022-Feb	3.3 2022-Jan	3.4	▼	-0.4
USA	3.5 2022-Mar	3.6 2021-Dec	3.4 2022-Feb	3.5 2022-Jan	3.5	▼	-0.1
Samoa	3.3 2022-Mar	3.1 2021-Dec	3.1 2022-Feb	3.0 2022-Jan	3.1	▼	-0.3
Tahiti (French Polynesia)	3.2 2022-Mar	3.3 2021-Dec	3.1 2022-Feb	3.2 2022-Jan	3.2	▲	0.0
Thailand	3.2 2022-Mar	3.3 2021-Dec	3.3 2022-Feb	3.3 2022-Jan	3.3	▲	0.0
Mexico	2.7 2022-Mar	3.3 2021-Dec	3.1 2022-Feb	3.0 2022-Jan	3.0	▲	0.2
Vanuatu	3.2 2022-Mar	3.0 2021-Dec	3.0 2022-Feb	2.9 2022-Jan	3.0	▼	-0.3
Indonesia	2.8 2022-Mar	2.9 2021-Dec	2.8 2022-Feb	2.9 2022-Jan	2.9	▲	0.1

THE TRAVEL CONSUMER COGITATIVE PROCESS



EMOTION LEADS TO TRAVEL ACTION

HOW ARE TRAVEL DECISIONS MADE?



THE POWER OF THE EMOTIONAL BRAIN IN TRAVEL DECISIONS

WHERE DO WE START WITH DESTINATION BRANDING?



**UNDERSTAND THE UNIQUE SELLING POINTS (USP'S) THAT
MATTER MOST**

Where do we start with destination branding?



The importance of the path to purchase



TOURISM.Defined

Twenty31.org

Twenty31 Consulting is a research and innovation-based management consultancy working with senior leaders of travel and tourism organizations to define and build sustainable, competitive advantage.



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