Cook Islands Visitor Survey

2019-20 Annual Report

(July 2019 – March 16 2020)

Prepared for Cook Islands Tourism Corporation

by

New Zealand Tourism Research Institute
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www.nztri.org

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EXECUTIVE SUMMARY

This report focuses on the characteristics and expenditure patterns of tourists who visit the Cook Islands. The data presented is drawn from the online International Visitor Survey (IVS) that has run since mid-2012. The survey period covered in this report is 1 July 2019 to 30 June 2020 (actual data collection covered 1 July 2019 to 16 March 2020 due to COVID-19). There were 2,472 individual respondents to the survey - representing a total of 5,050 adults, and an additional 1,009 children (the latter figures equate to 5% of all visitors during the period – based on visitor arrival data from the Cook Islands Statistics Office).

The majority (63%) of visitors surveyed come from New Zealand, while 20% come from Australia. Visitors are well educated (73% have some form of tertiary education) and over half (52%) have a household income of over NZ$100,000 per year. Over a third (39%) of the visitors surveyed are travelling with one companion. Solo travellers are relatively rare (12%). More than half of the visitors surveyed (58%) are on their first visit to the Cook Islands, a further 25% have visited once or twice before. The main purpose of visit is holiday making (80%). The average length of stay in the Cook Islands is 8.5 nights. A vast majority of visitors (94%) stay either one or two weeks. One in five (20%) visitors travel to Aitutaki.

Despite the lack of fourth quarter data the survey results for this year are generally consistent with the those of the previous 2019-2020 annual period. Visitor spend prior to arrival in the Cook Islands ($2,049) has increased slightly from the 2018-2019 annual average figure ($2,047 per person), while visitor's spend in the country ($154 per person per day) has decreased from the 2018-2019 annual average figure ($162 per person per day).

Overall satisfaction of visitors remains consistent with the previous year: 91% of visitors felt satisfied or very satisfied with their experience in the Cook Islands. Visitor satisfaction with the friendliness of Cook Islanders and the overall level of service is high. Water-based activities are seen to have the strongest participation levels, while cultural activities and land-based activities generally have the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are the beautiful natural environment, the friendly local people, the range of activities, attractions, entertainment and events, and the peacefulness and relaxing atmosphere of the destination. The least appealing elements of the Cook Islands visitor experience are the poor provision and quality of public services and facilities, price of goods and services, the price and quality of food ang beverage, and stray animals/mosquitos.

The future intentions of visitors remained very similar to the previous year: 92% of those surveyed want to return to the Cook Islands and 97% would recommend the Cook Islands to friends or family.

Acknowledgements

NZTRI would like to acknowledge the support of numerous Cook Islands organisations in undertaking this ongoing research, in particular Cook Islands Tourism (special mention to Metua Vaiimene and Jake Numanga), the Cook Islands Statistics Office, Immigration Cook Islands, and Rarotonga International Airport. This report was prepared by Simon Milne and Mindy Sun.

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INTRODUCTION

This report focuses on the characteristics, satisfaction levels and expenditure patterns of international tourists who visit the Cook Islands. The data presented is drawn from the International Visitor Survey (IVS). The survey period covered by this report would normally be 1 July 2019 to 30 June 2020. Due to the COVID-19 outbreak, the Cook Islands has temporarily shut its air border to any incoming travellers. Thus, the data collection only covers 1 July 2019 to 16 March 2020.

The annual report is designed to provide an easily accessible summary of the key findings that have emerged from the three quarterly reports produced during the July 2019 – June 2020 period **(Qtr 1 July – September 2019; Qtr 2 October – December 2019; Qtr 3 January – March, 2020)**. Each of these previous quarterly reports provides a more detailed overview of findings. During the 9-month period 18,327 visitors were contacted by email to take part in the survey, and 2,472 responses were received: the conversion rate was 14% (Table 1). This rate was lower than that recorded during 2018/19 (16%).

Table 1: Conversion rate cross 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Total/Average
Emails sent	6356	3488	8483	**Total: 18327**
Respondents	915	567	990	**Total: 2472**
Conversion rate	14%	16%	12%	**14%**

The report focuses on the following themes:

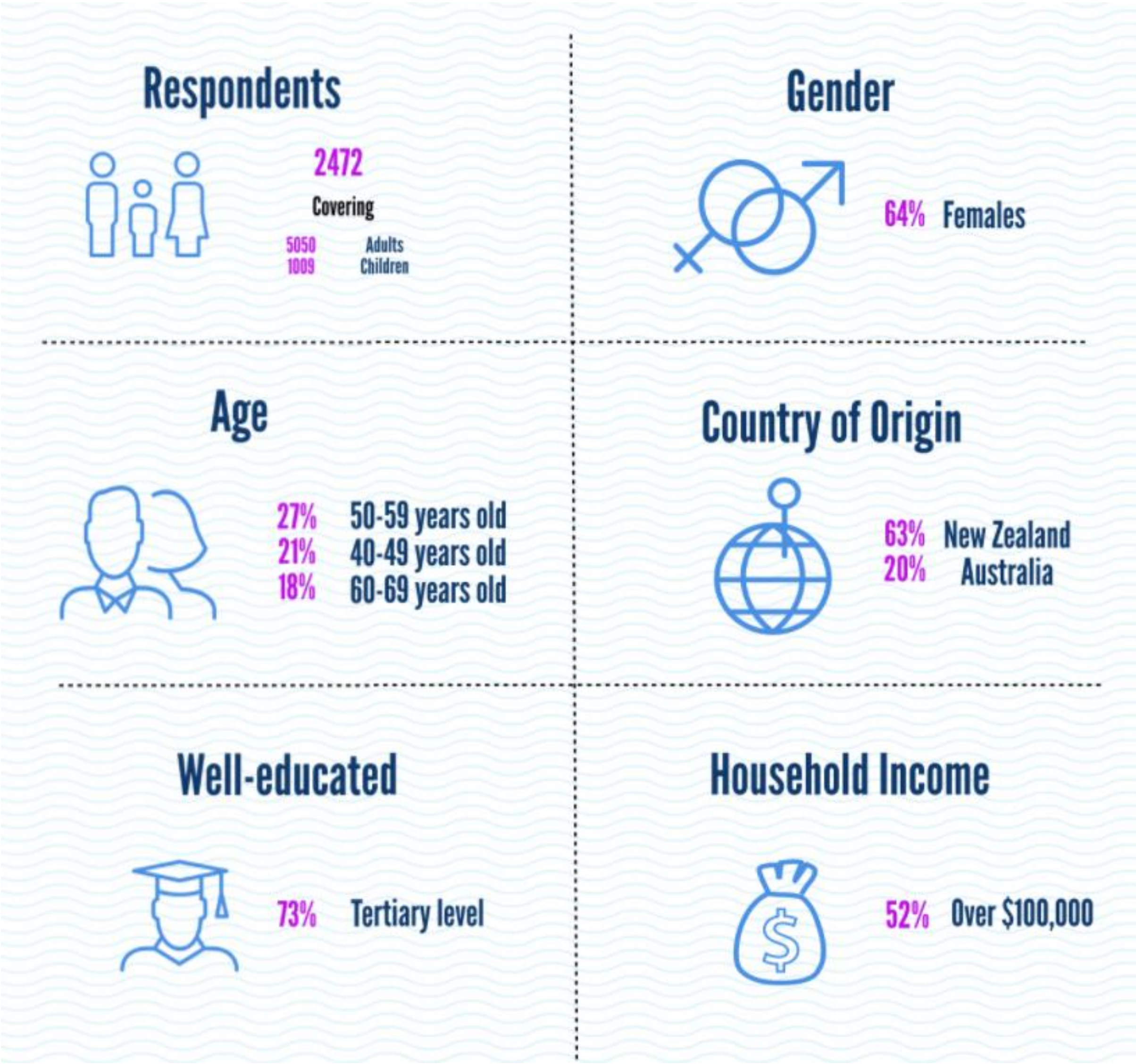
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling companions, number of previous visits, length of stay, airline used, and islands visited).
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook Islands, and spending patterns).
- Visitor satisfaction (most and least appealing aspects of visit, and overall satisfaction levels).

In each section of the report we provide a simple infographic that summarises some of the key highlights for the 2019-2020 survey period. More detailed tables are also provided where appropriate.

VISITOR CHARACTERISTICS

There were 2,472 individual respondents to the survey - representing a total of 5,050 adults and an additional 1,009 children (Figure 1). We estimate that this latter figure equates to 5% of all visitors during the period – based on visitor arrival data from the Cook Islands Statistics Office.

Figure 1: Summary of visitor demographics 2019-20



The distribution of respondents by age and gender is consistent throughout the year. Nearly half of the visitors (48%) are aged between 40 and 59 years, with a further 18% falling into the 60-69 age group (Table 2).

The New Zealand and Australian markets dominate in terms of visitor arrivals but there are variations through the year (Table 2). The majority of visitors surveyed (63% annual average) are from New Zealand. The Australian market makes up 20% of annual visitors. Visits by New Zealanders dropped during the January - March period (3rd Qtr) which coincides with the country's summer holiday season. During the same period, European and North American visitors are at their most prominent as they escape the Northern hemisphere winter months.

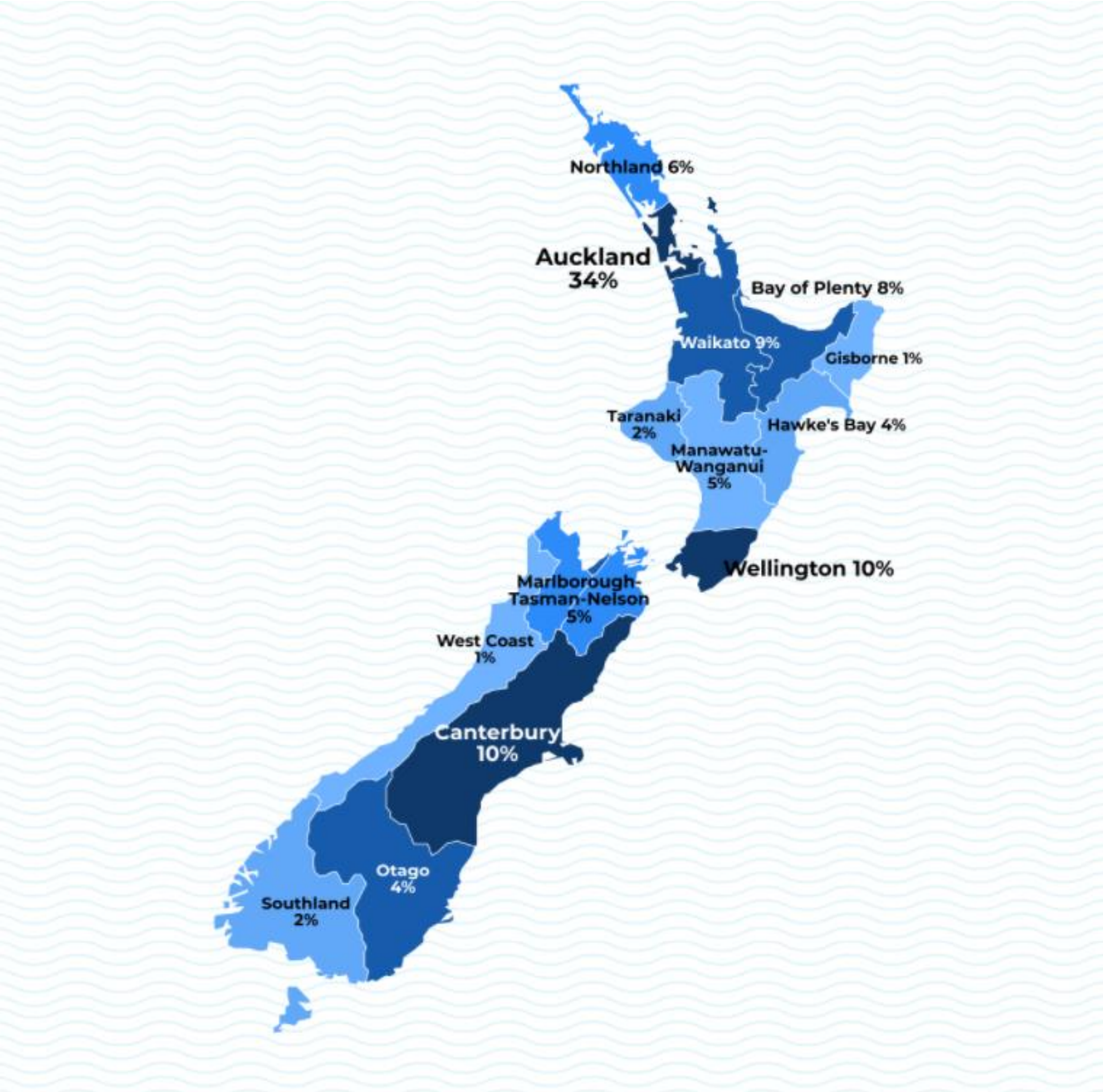
Visitors are well educated with over two thirds of respondents (73%) having some form of tertiary education. Slightly over half (52%) of all visitors have household incomes of over NZ$100,000 (Table 2).

Table 2: Demographics across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Total/Average
Respondents	915	567	990	**Total: 2472**
People covered in spend analysis				
Adults:	1818	1142	2089	**Total: 5050 adults**
Children:	425	223	361	**1009 children**
Gender				
Female:	64%	63%	65%	**64%**
Age				
30-39 years:	15%	15%	17%	**16%**
40-49 years:	23%	20%	20%	**21%**
50-59 years:	26%	30%	25%	**27%**
60-69 years:	16%	19%	20%	**18%**
Country of origin				
NZ:	64%	72%	52%	**63%**
Australia:	23%	17%	21%	**20%**
USA/Canada:	6%	6%	15%	**9%**
Europe:	6%	4%	10%	**6%**
Education				
Tertiary level:	74%	74%	72%	**73%**
Household income				
Under $100,000:	50%	50%	42%	**47%**
$100,001-200,000:	37%	38%	38%	**38%**
Over $200,001:	13%	11%	20%	**15%**

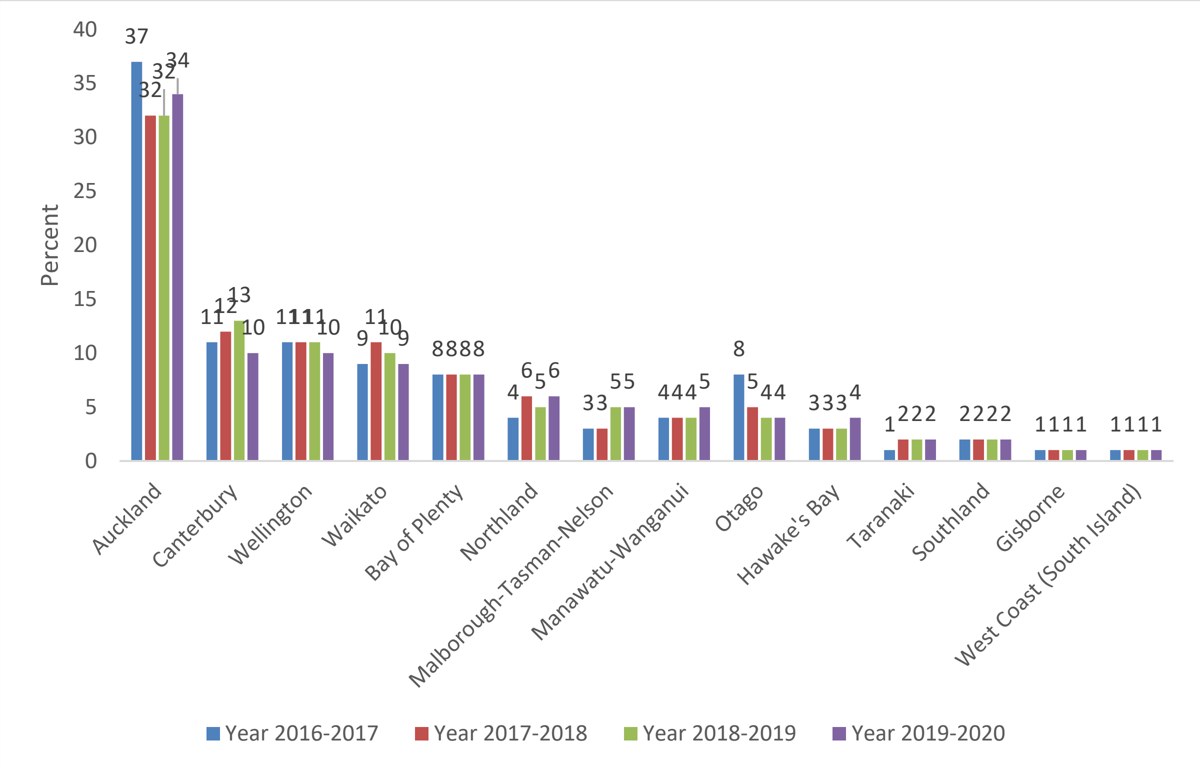
Visitors from New Zealand and Australia are given the opportunity to indicate which part of the country they reside in. Of the New Zealand visitors, over a third (34%) came from Auckland, followed by Canterbury (10%), Wellington (10%), and Waikato (9%) (Figure 2).

Figure 2: New Zealand visitors 2019-20



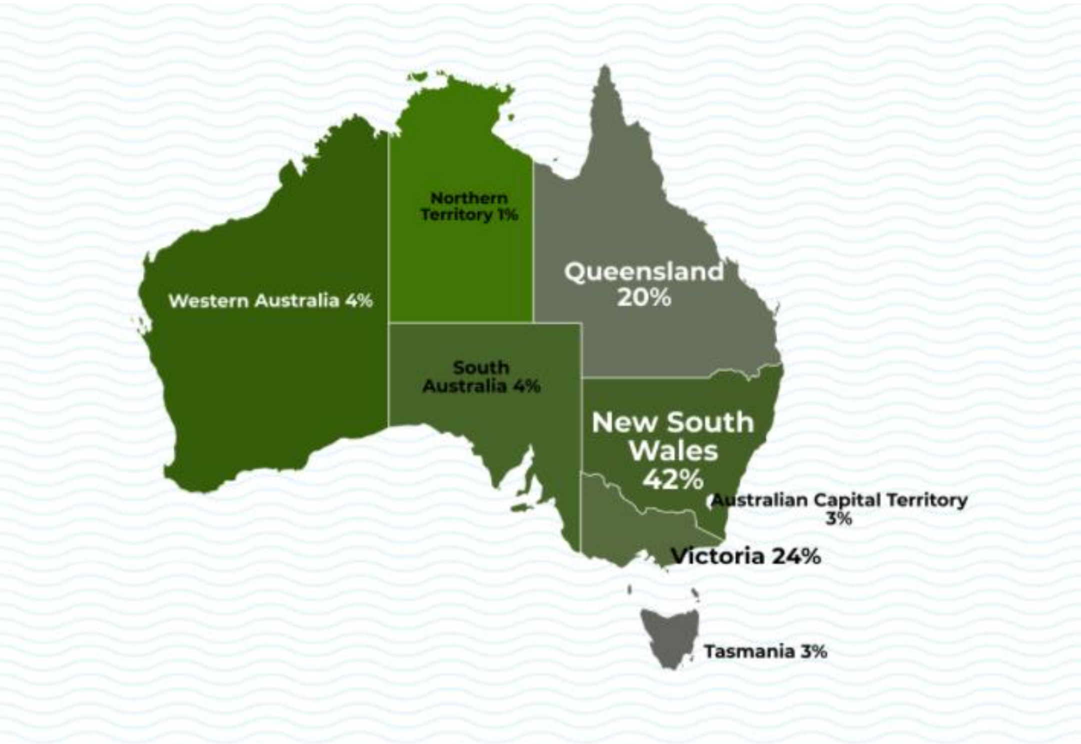
These figures are relatively consistent with the survey findings from the previous three annual reports (Figure 3).

Figure 3: Visitors from New Zealand - yearly breakdown



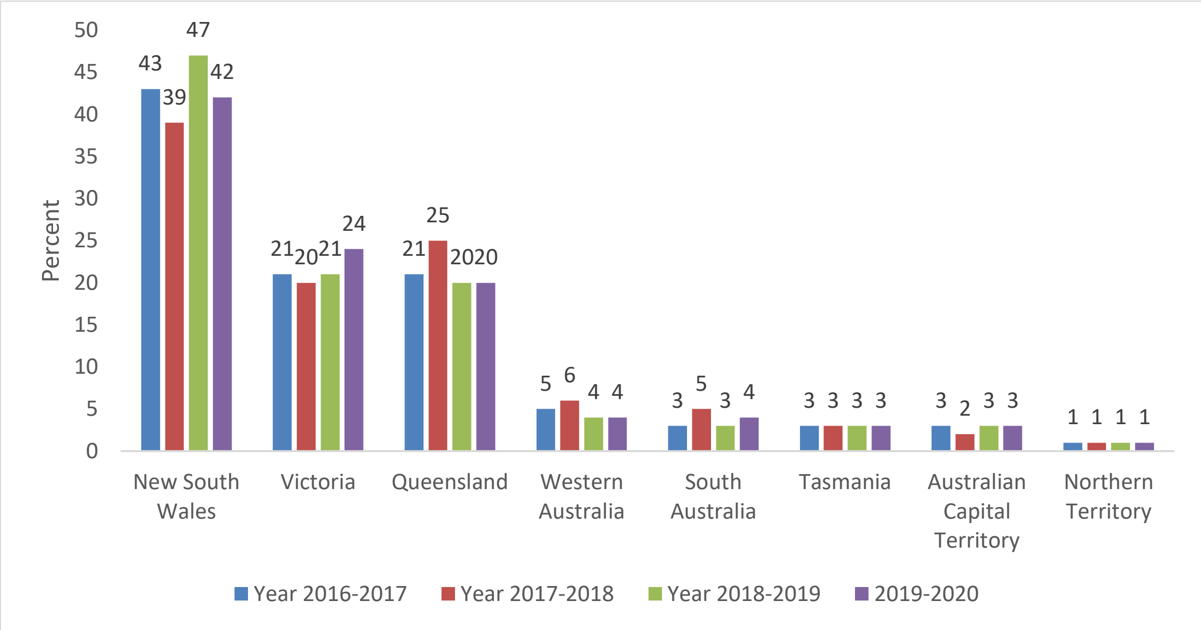
New South Wales (NSW), Queensland, and Victoria account for the majority (86%) of the Australian visitor arrivals to the Cook Islands during the 2019-2020 survey period (Figure 4).

Figure 4: Australian visitors 2019-20



Compared to previous years, the survey findings are relatively consistent (Figure 5).

Figure 5: Visitors from Australia - yearly breakdown



Air New Zealand is the most commonly flown airline to Rarotonga (71%) with Jetstar Airways capturing 16% of the market, and Virgin Australia accounting for 15% (Figure 6). Virtually all visitors (99%) spend time on Rarotonga, with one fifth (20%) visiting Aitutaki. Of the smaller Islands, only 1% of visitors went to Atiu, with other outer islands only attracting a small number of visitors.

A sizeable portion of visitors (58%) were on their first visit to the Cook Islands, with a further 25% having visited once or twice before. New Zealanders are the most likely to be repeat visitors – with 55% of respondents having visited at least once before.

The majority of visitors (51%) spend 1 week in the Cook Islands with a further 43% staying a second week (Table 3). Only 6% of respondents spend longer than 2 weeks. The average length of stay over the 12-month period was 8.5 nights – with little variation across the three quarters.

When asked for their main purpose of visit most respondents (80%) classify themselves as holiday makers. Participation in a wedding party represents the major purpose of visit for a further 7% of those surveyed.

The Cook Islands represents the only travel destination for 87% of the visitors. For 13% of visitors the Cook Islands is part of a larger journey, which includes other destinations such as New Zealand (76%), Australia (25%), other Pacific Islands (21%), Asia (16%), and North America (15%).

Figure 6: Summary of visit characteristics 2019-20

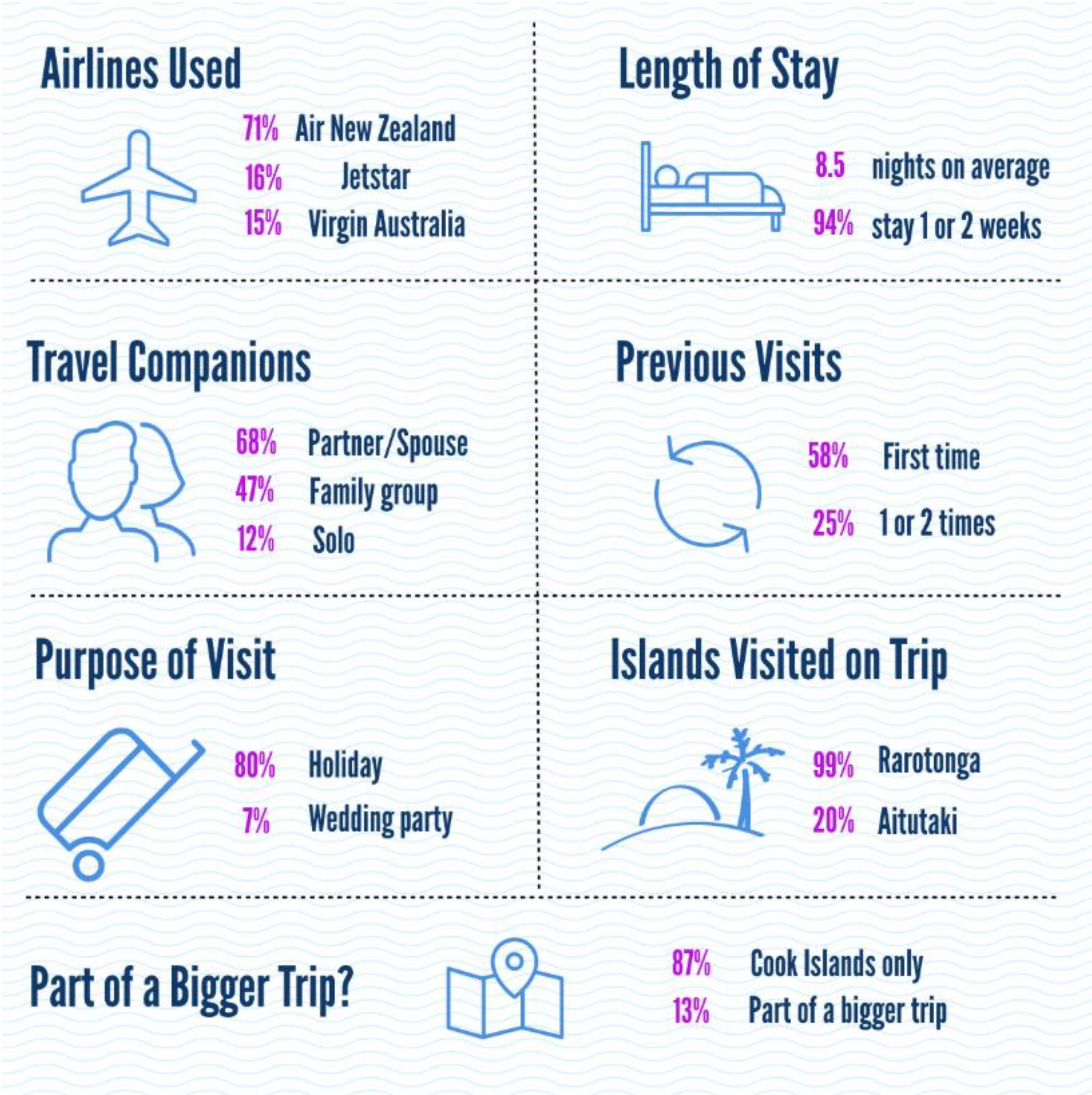


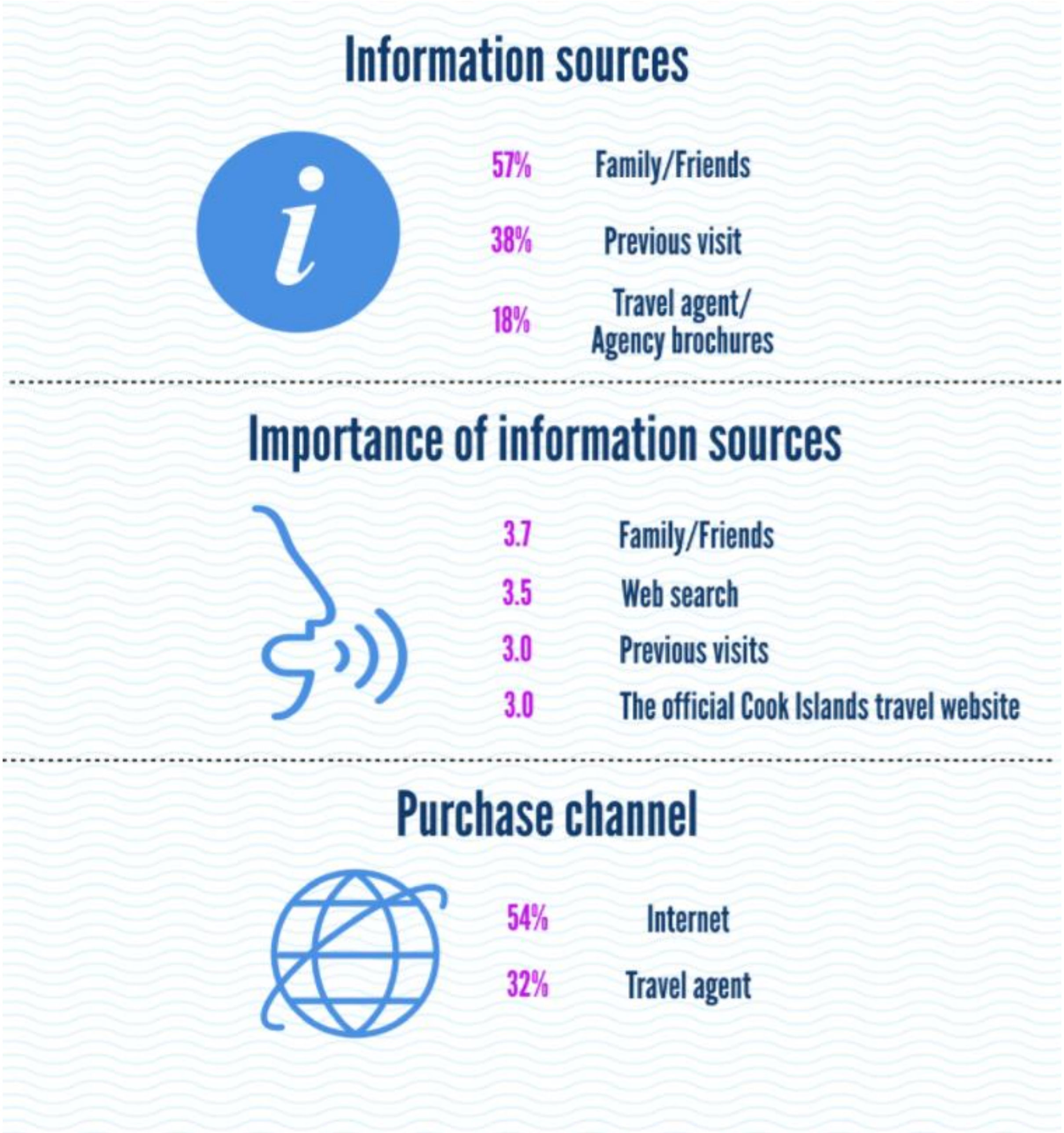
Table 3: Visit characteristics across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Airlines used				
Air NZ:	65%	69%	79%	**71%**
Jetstar:	18%	19%	11%	**16%**
Virgin Australia:	20%	13%	13%	**15%**
Companions				
1 companion:	34%	42%	41%	**39%**
Solo:	13%	10%	12%	**12%**
Visits to Cook Islands				
1st trip:	61%	54%	59%	**58%**
1-2 previous trips:	24%	27%	25%	**25%**
Previous visits				
1st time:	NZ 49% AU 78%	NZ 46% AU 74%	NZ 41% AU 77%	**NZ 45%** **AU 76%**
2-3 times:	NZ 30% AU 14%	NZ 30% AU 19%	NZ 36% AU 13%	**NZ 32%** **AU 15%**
4-5 times:	NZ 10% AU 1%	NZ 11% AU 6%	NZ 9% AU 6%	**NZ 10%** **AU 4%**
5+ times:	NZ 11% AU 5%	NZ 14% AU 1%	NZ 14% AU 4%	**NZ 13%** **AU 3%**
Travelling with who?				
Partner/spouse:	67%	69%	67%	**68%**
Family group:	53%	45%	43%	**47%**
Purpose of travel				
Holidaymakers:	80%	81%	76%	**80%**
Wedding party:	6%	7%	7%	**7%**
VFR:	4%	4%	4%	**4%**
Business:	2%	2%	2%	**2%**
Length of stay				
Average nights:	8.3	8.5	8.8	**8.5**
Within 1 week:	52%	51%	51%	**51%**
1 to 2 weeks:	43%	44%	42%	**43%**
Islands visited on trip				
Rarotonga:	99%	99%	98%	**99%**
Aitutaki:	21%	16%	23%	**20%**
Atiu:	1%	2%	1%	**1%**
Is Cooks visit part of a larger trip?				
Cooks only:	88%	92%	80%	**87%**
Part of a larger trip:	12%	8%	20%	**13%**

INFORMATION SOURCES & PURCHASING BEHAVIOUR

Participants were asked how they found out about the Cook Islands as a holiday destination, and to rank the three sources of information that were most important in this respect (Figure 7). Over half (57%) of respondents ranked word of mouth from friends and family members as the most important influence, followed by previous experience (38%), and travel agents (18%).

Figure 7: Information sources and purchasing behaviour across 2019-20



When visitors were asked to rank the importance of the listed information sources used to plan their trip, friends and family members emerged as the most important source (3.7 out of 5) (Table 4). Other important information sources are web search engines (3.5), previous visits (3.0), and the official Cook Islands travel website (3.0). Over half (54%) of visitors surveyed made their own travel arrangements through online websites or booked directly with hotels or airlines. A smaller number of visitors surveyed (32%) purchased a pre-paid trip through travel agents.

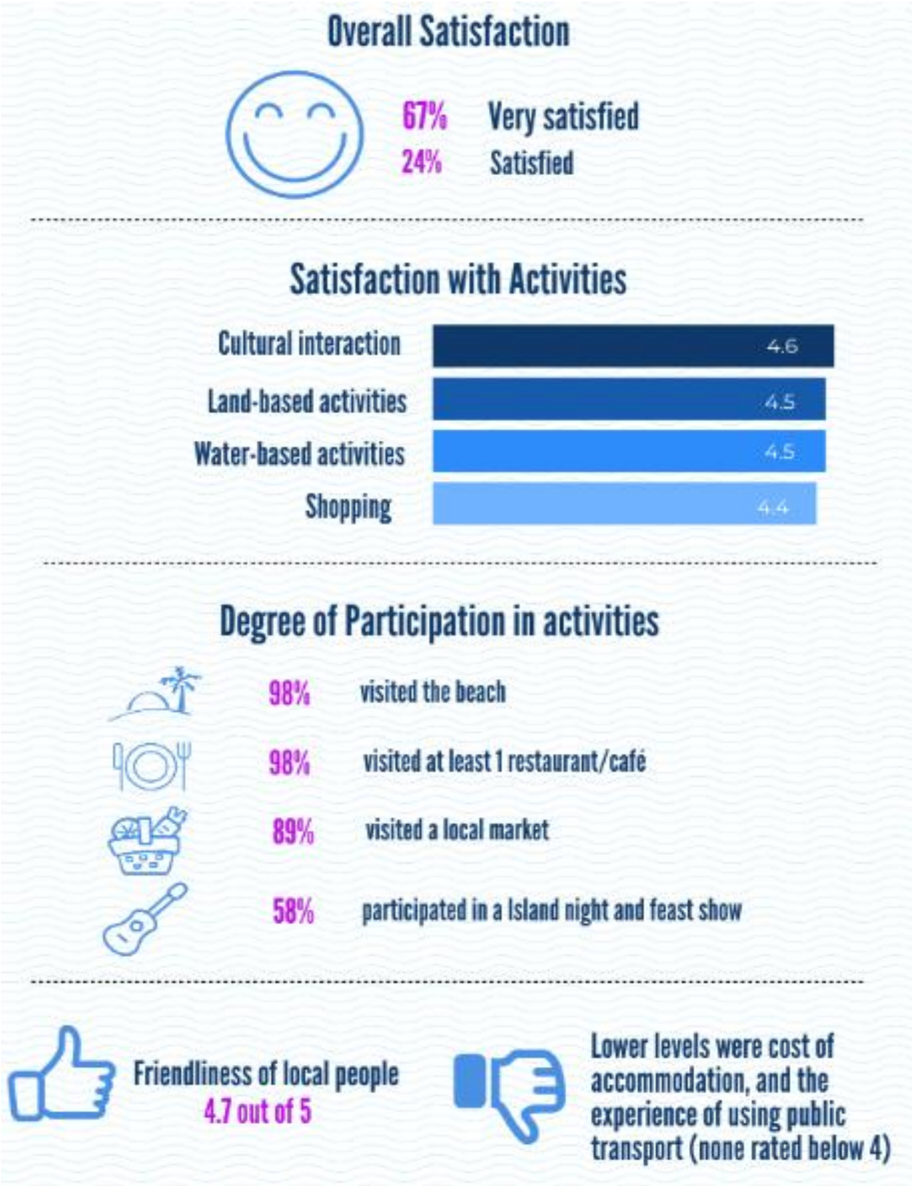
Table 4: Information sources and purchasing behaviour cross 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Find out about the Cook Islands				
Friends/family:	59%	58%	54%	**57%**
Previous visits:	36%	41%	36%	**38%**
Travel agent/agency brochures	18%	18%	17%	**18%**
Information sources for planning				
Friends/family:	3.7	3.8	3.6	**3.7**
Web search engines:	3.5	3.5	3.5	**3.5**
Previous visit:	2.9	3.1	3.0	**3.0**
The official CIs travel websites:	3.0	2.9	3.1	**3.0**
Purchase / booking				
I made my own:	55%	53%	53%	**54%**
Through travel agent:	31%	34%	31%	**32%**

VISITOR SATISFACTION

Two thirds (67%) of the visitors said they were 'very satisfied' with their overall experience in the Cook Islands (on a scale from 1 'very dissatisfied' to 5 'very satisfied'). A further 24% indicated they were satisfied (Figure 8).

Figure 8: Visitor satisfaction 2019-20



Visitor satisfaction is generally high for all activities undertaken (Table 5). Visitors enjoy water-based activities, with almost everyone participating in some sort of beach or water activity (98% visiting a beach, 93% swimming, and 83% snorkelling). Nearly all of visitors (98%) visit at least one restaurant/bar/café during their stay in the Cook Islands. The local markets and Island Night shows are also enjoyed by the majority of visitors (89% and 58% respectively).

Table 5: Satisfaction across 1-3 quarters

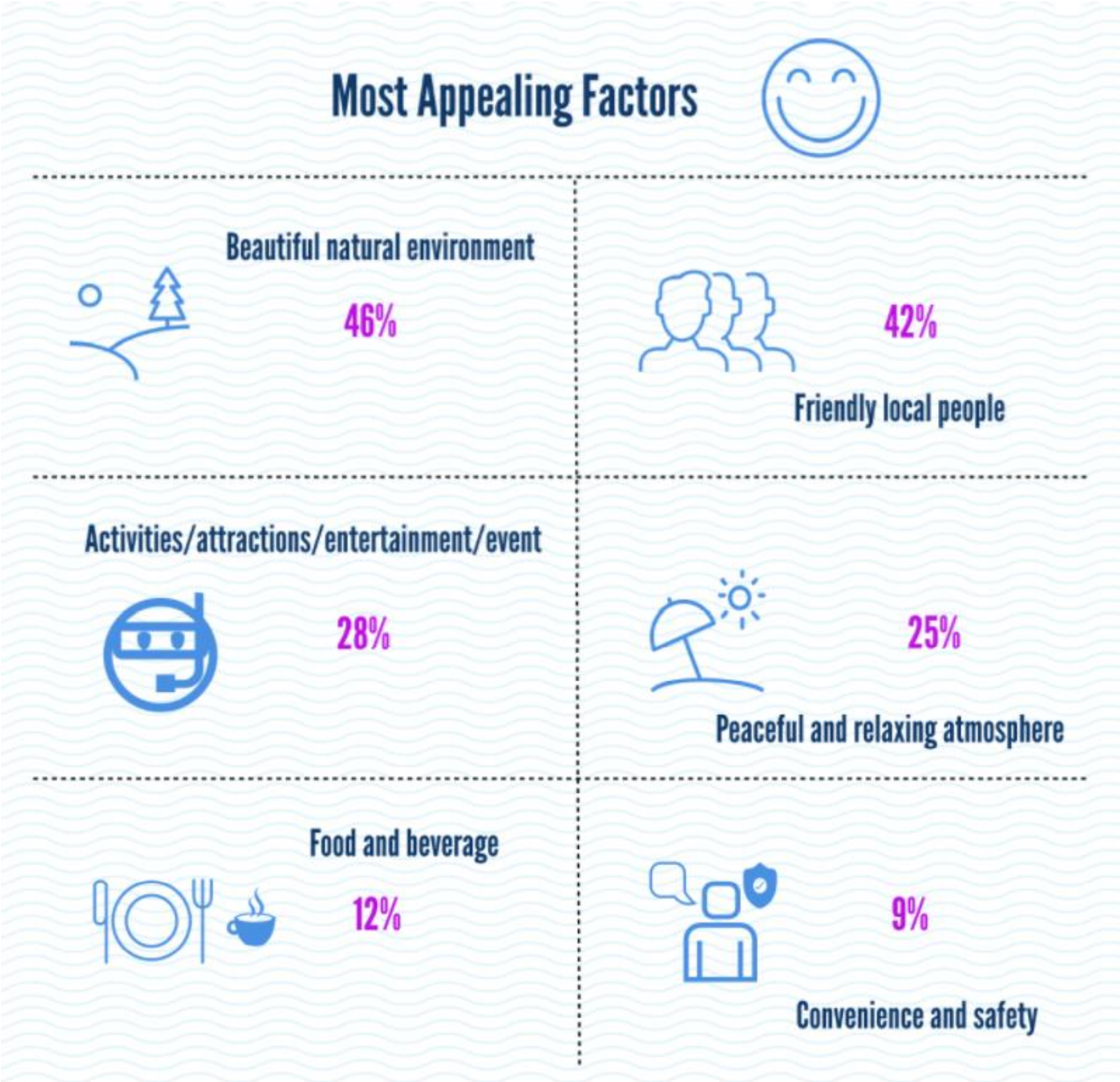
Comparison	1st qtr	2nd qtr	3rd qtr	Average
Overall satisfaction				
Very satisfied:	65%	69%	68%	**67%**
Satisfied:	25%	23%	24%	**24%**
Satisfaction with activities	Water-based, cultural interaction, land-based and shopping: all have high satisfaction levels (greater than 4 out of 5)			
Water-based:	4.4	4.4	4.4	**4.4**
Cultural interaction:	4.6	4.6	4.6	**4.6**
Land-based:	4.5	4.5	4.5	**4.5**
Shopping:	4.4	4.5	4.5	**4.5**
Degree of participation in activities	**Almost everyone participated in water-based activities and visited at least 1 restaurant/café**			
Visit local market:	92%	88%	87%	**89%**
Island night & feast show:	60%	54%	59%	**58%**
Lowest participation:	Bonefishing, Kitesurfing, Tumunu on Atiu, and Ocean cruise			
Satisfaction with different aspects of service in Cooks	**Friendliness of local people – highly rated (out of 5)**			
Friendliness of local people:	4.7	4.7	4.8	**4.7**
	Lowest levels of satisfaction: The experience of using public transport, the cost and the quality of accommodation, the frequency of air transport within the Cook Islands, and the experience of renting a vehicle (although none was below 4 out of 5)			
Public transport:	4.0	4.1	4.2	**4.1**
Cost of accom:	4.1	4.1	4.1	**4.1**
Frequency of Air trans:	4.2	4.2	4.2	**4.2**
Rent a vehicle:	4.2	4.2	4.2	**4.2**
Quality of accom	4.2	4.2	4.3	**4.2**

Visitors were asked to rate their level of satisfaction with nine different statements that related to their most recent visit to the Cook Islands. Friendliness of the local people scored the highest among all categories with 4.7 out of 5 (Figure 9, Table 5). The lowest levels of satisfaction relate to the cost and quality of accommodation (4.1/4.2), the experience of using public transport (4.1), the frequency of air transport within the Cook Islands (4.2), and the experience of renting a vehicle (4.2). In no cases do satisfaction scores fall below 4 out of 5. There is little variation in participation rates and satisfaction levels across the four quarters.

Visitors were given the opportunity to discuss in more detail the factors that they found most or least appealing about their most recent visit to the Cook Islands. We reviewed and categorised the responses – people could provide as many comments as desired (Figure 9, Table 5).

The beautiful natural environment consistently receives the highest rating in terms of appeal. Slightly under half of all visitors (46%) who made a positive comment are enthusiastic about the 'untouched' and relatively pristine nature of both the marine and natural environments. Visitors also found the friendliness of the local people (42%), activities, attractions, entertainment, and event (28%), the peaceful and relaxing atmosphere that the Cook Islands has to offer (25%) very appealing.

Figure 9: Most appealing factors 2019-20



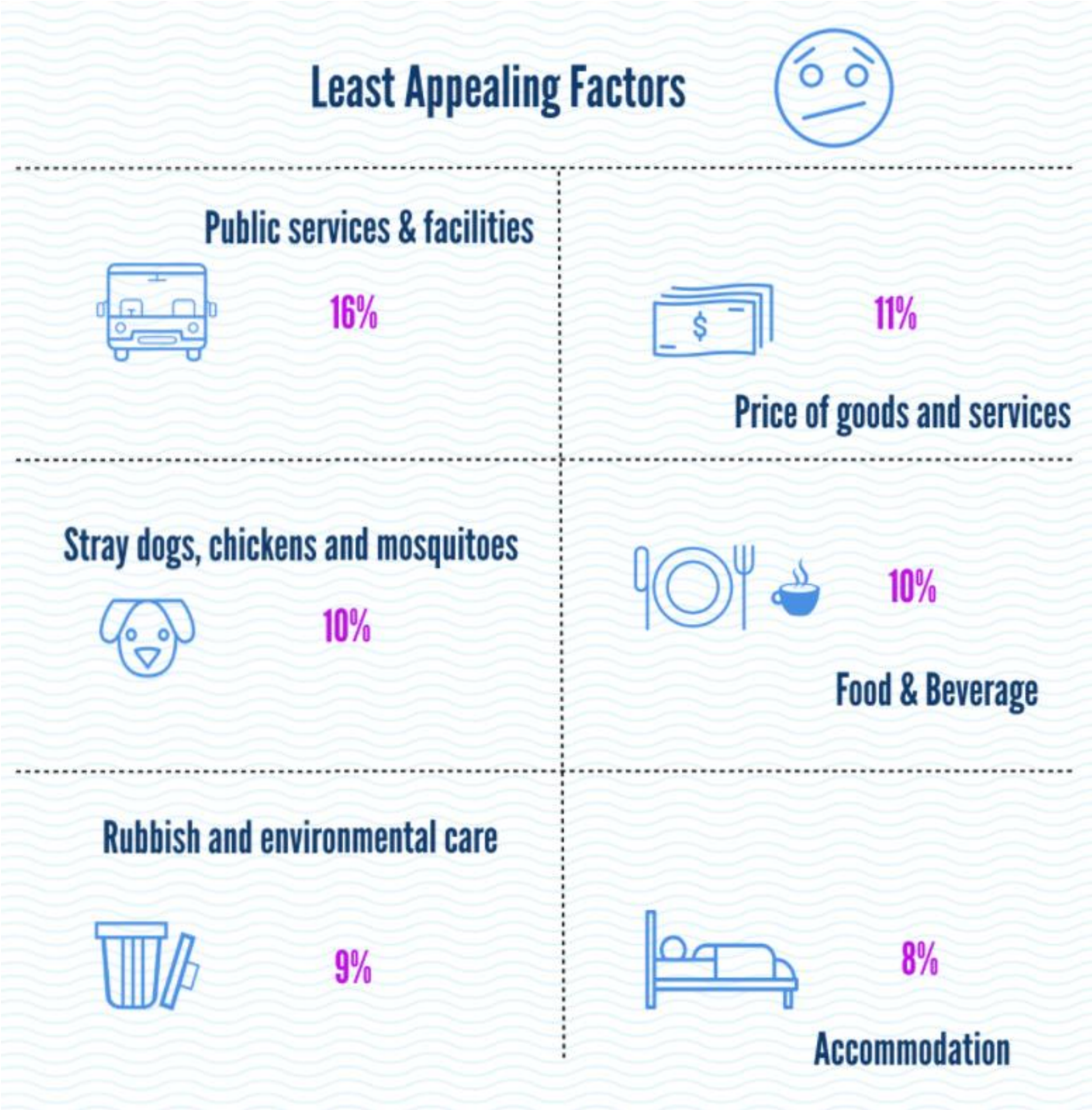
The percentage of tourists highlighting the three most significant areas of appeal remained relatively consistent across the 3 quarters (Table 6). These figures are similar to the levels registered during 2018/19.

Table 6: Most appealing factors across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Beautiful natural environment	46%	47%	43%	**46%**
Friendly local people	42%	46%	38%	**42%**
Activities/attractions/entertain-ment/events	28%	27%	28%	**28%**
Peaceful and relaxing atmosphere	26%	26%	22%	**25%**
Food and beverage	14%	11%	12%	**12%**
Convenience & safety	10%	12%	4%	**9%**
Accommodation	5%	5%	5%	**5%**
Overall good experience	3%	3%	3%	**3%**

Visitors were also asked to comment on the least appealing aspects of their most recent visit to the Cook Islands (Figure 10, Table 7).

Figure 10: Least appealing factors 2019-20



The key themes to emerge were a lack of public services and facilities (16%). Tourists also focused on the problems associated with the high prices of goods and services (11%). Stray animals and mosquitos (10%), the price and quality of food and beverage (10%), and environmental issues (pollution, rubbish) (9%) were also commented on.

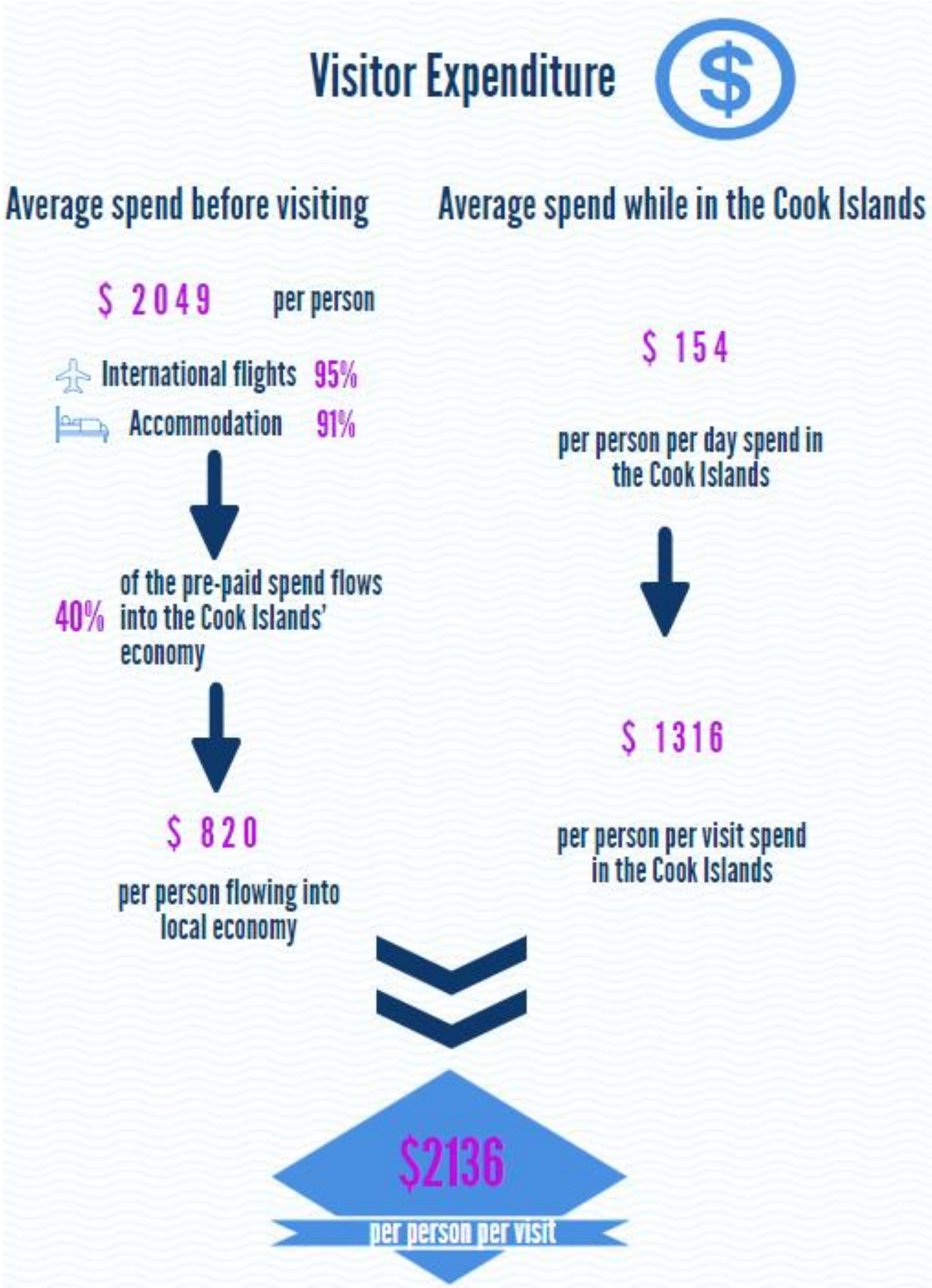
Table 7: Least appealing factors across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Public services, facilities and infrastructure	17%	17%	15%	**16%**
Price of goods and services	12%	10%	10%	**11%**
Stray animals and mosquitos	10%	11%	10%	**10%**
Food and Beverage	7%	12%	12%	**10%**
Rubbish and natural environment care	7%	11%	10%	**9%**
Poor weather	8%	8%	8%	**8%**
Accommodation	9%	8%	7%	**8%**
Attractions and activities	6%	7%	8%	**7%**
Customer Service	7%	6%	9%	**7%**
Rental cars or scooters	4%	6%	2%	**4%**
Flight related issues	2%	3%	2%	**2%**

VISITOR EXPENDITURE

In reviewing the economic impact of tourism on the Cook Islands economy this report focuses on two key components: money spent before arrival (on airfares and/or packages) and money spent after arrival in the Cook Islands (excluding pre-paid spend) (Figure 11, Table 8).

Figure 11: Visitor expenditure 2019-20



Pre-paid spend is a significant contributor to the economic impact of tourism, with an average of NZ$2,049 being spent per visitor which is slightly higher than the average prepaid spend of 2018/19 (NZ$2,047) (Table 8). For the bulk of visitors this spend includes international airfares (95%) and accommodation (91%). Based on previous estimates we assume that approximately 40% of pre-paid spend (or NZ$820 per visit) makes its way back directly into the Cook Islands economy.

The amount of money spent by visitors whilst in the Cook Islands averaged NZ$154 per person per day for the 2019-20 period ($1,316 per visit) (Table 8). The annual average for local spend per person per day (in country) is lower than the annual figure for 2018/19 (NZ$162).

Table 8: Expenditure across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Average spend before visiting (per person)	$1903	$2064	$2179	**$2049**
	40% of the pre-paid spend flows into the Cook Islands' economy			
Pre-paid spend that flows into the local economy (per person):	$761	$826	$872	**$820**
Items included in spent prior to arrival				
Inter. Flights:	95%	96%	94%	**95%**
Accom:	90%	92%	91%	**91%**
Spend while in Cooks				
Whole trip:	$1228	$1267	$1453	**$1316**
per person per day:	$148	$149	$166	**$154**
Total spend per visit flowing into the Cook Islands economy	$1989	$2093	$2325	**$2136**

The total figure of what is spent locally and what flows back to the Cook Islands from pre-paid expenses per visit decreased from $2189 in the 2018/19 period to $2136 in the 2019/20 year. Visitor yield decreased slightly from the first quarter to second quarters of 2019/20, and then bounced back in the third quarter (Figure 12 &13).

Figure 12: Average spend in country per visitor per day (NZ$)

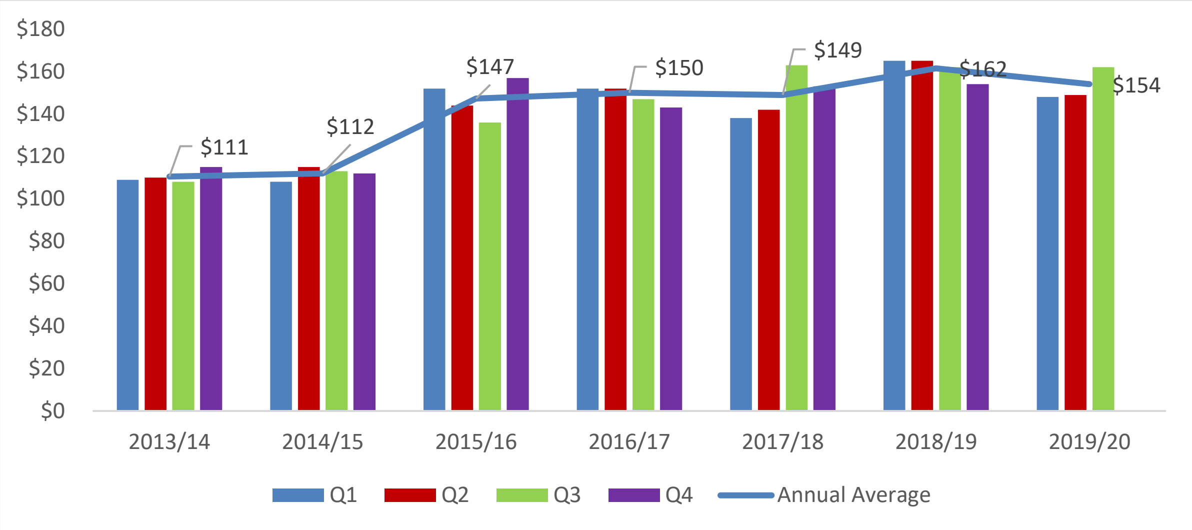
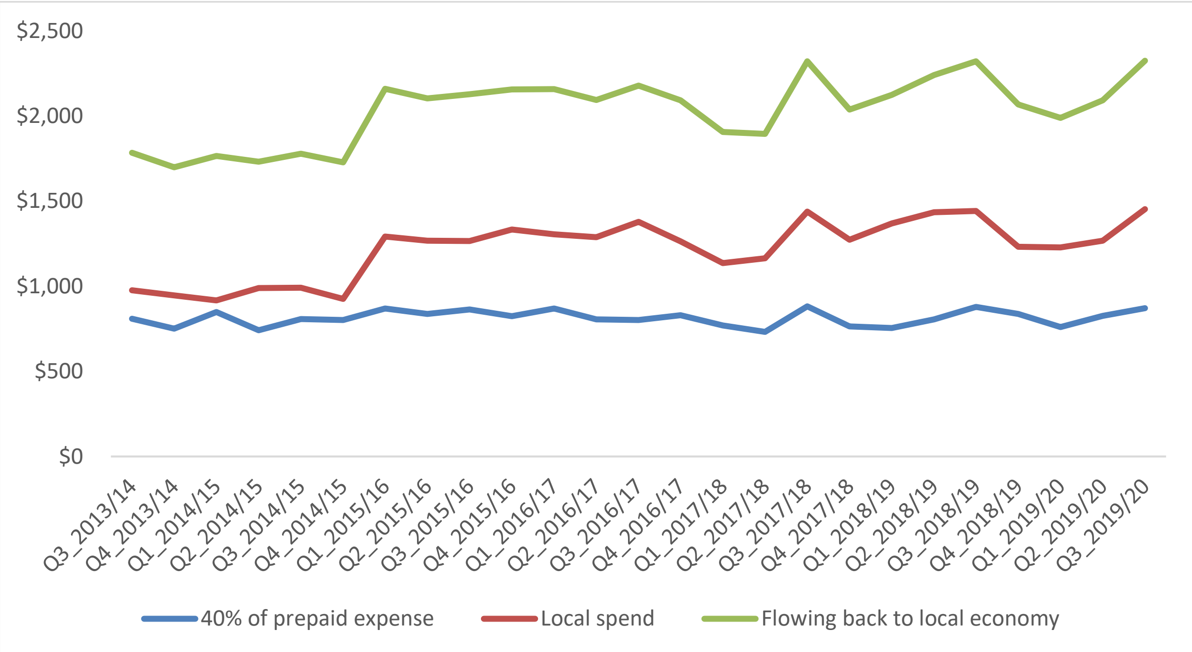
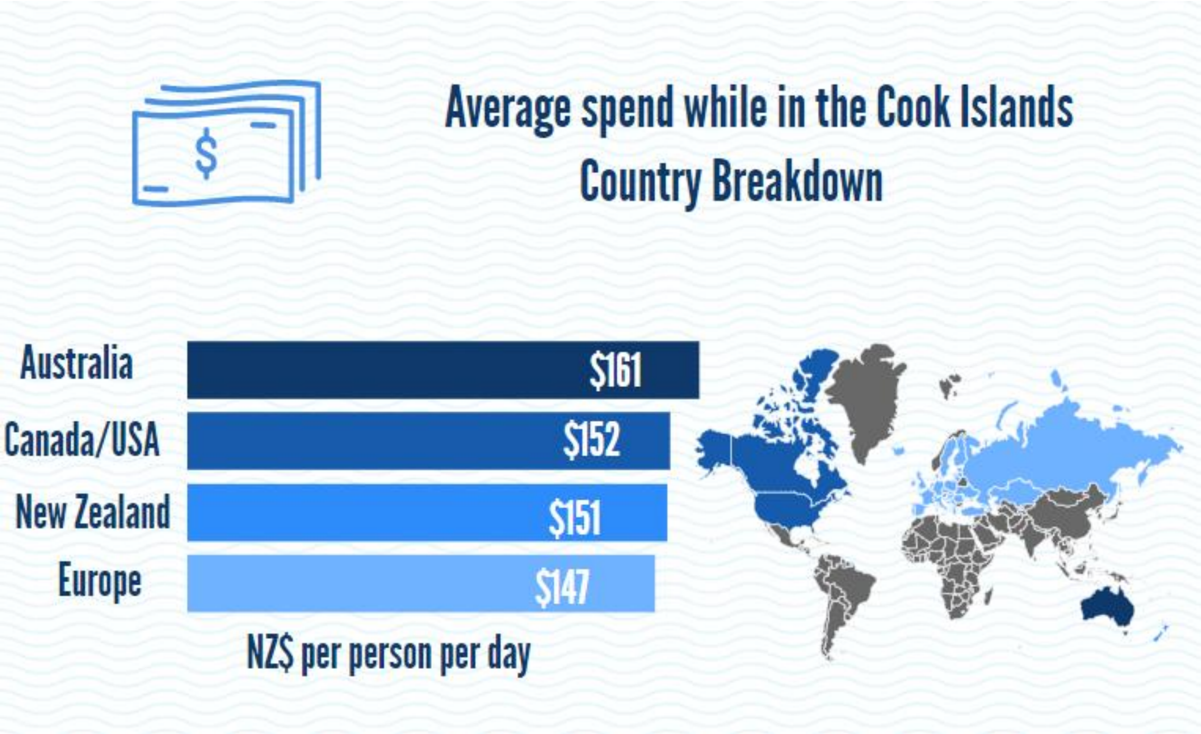


Figure 13: Amount of money spent per person (NZ$)



Visitors from Europe have the lowest on-island spend of the major tourism markets – with a figure of NZ$147 per person per day (NZ$141 2018/19). The highest spending group are visitors from Australia at NZ$161 per person per day (NZ$174 2018/19). North American visitors are the next highest spending group with an average spend of $152 (NZ$158 2018/19), followed by New Zealand visitors with spend of $151 per person per day (NZ$148 2018/19) (Figure 14).

Figure 14: Visitor expenditure in the Cook Islands by country of origin 2019-20



There are differences in spend figures between nationalities during the course of the year; Australians and North Americans spend most from Jan to March (3rd Qtr). Visitors from Europe and New Zealand spend more in the period of July to September (1st Qtr). These variations could point to different sub-markets from these major source markets, and this is an area worthy of further data analysis (Table 9). It should be noted that some of the quarterly data for specific market groups (e.g. Europe) is based on relatively small sample sizes. For more specific details the reader is directed to the Quarterly reports available from Cooks Islands Tourism.

Table 9: Expenditure in the Cook Islands across 1-3 quarters by Country of origin

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Average spend by country of origin (person per day)				
Australia:	$171	$128	$184	**$161**
Canada/USA:	$148	$124	$184	**$152**
NZ:	$128	$160	$156	**$151**
Europe:	$180	$101	$160	**$147**

It is important to understand how in-country visitor spend is distributed across different sectors of the economy. Table 10 shows the spread of average visitor expenditure (per person per day) in the Cook Islands across quarters 1-3. These figures represent average spend per day for **<u>all</u>** visitors (e.g. whether they have spent money on a category or not).

In-country spend on accommodation has decreased from the previous year's 2018/19 annual average (NZ$69 for accommodation). Accommodation features as the most important category for in-country visitor spend – this includes those that have not pre-paid for a room and also those who may pay for accommodation extras once on island (e.g. a room upgrade, wifi access or in house food and beverage).

Table 10: Average visitor expenditure in the Cook Islands across 1-3 quarters
(NZD per person per day)

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Accommodation	58	59	68	**62**
Restaurant, cafes and bar	33	33	34	**33**
Vehicle rental	10	10	10	**10**
Petrol	2	2	2	**2**
Domestic flights	9	7	11	**9**
Public transportation	1	1	1	**1**
Cruising	2	2	2	**2**
Groceries	2	2	2	**2**
Shopping	8	8	9	**8**
Activities	12	12	14	**13**
Other	11	9	10	**10**
Internet cost	2	3	3	**3**
Total expenditure per person per day	148	149	166	**154**

Visitor expenditure on shopping and activities remains relatively low and there is certainly potential to increase visitor yield in these areas.

The overall spend per visitor and how it links to the economy (yield) is an important barometer of industry health and performance. It is critical in coming years that efforts continue to be made to increase visitor yield across a range of sectors – especially those that generate strong links to the local economy.

FUTURE INTENTIONS

An overwhelming majority of visitors (93%) stated that they would return to the Cook Islands (Figure 15). Nearly all visitors (97%) say that they would recommend the Cook Islands to others.

Of real interest to businesses and communities in the outer islands is the fact that 47% expressed an interest in visiting another island on their next trip to the Cook Islands, and slightly under half (49%) mentioned that they would 'maybe' include an outer island in their next trip. The critical challenge is to convert this intention into an actual outer island visit. The future intentions of visitors remained very consistent across the year (Table 11).

Figure 15: Future intentions 2019-20

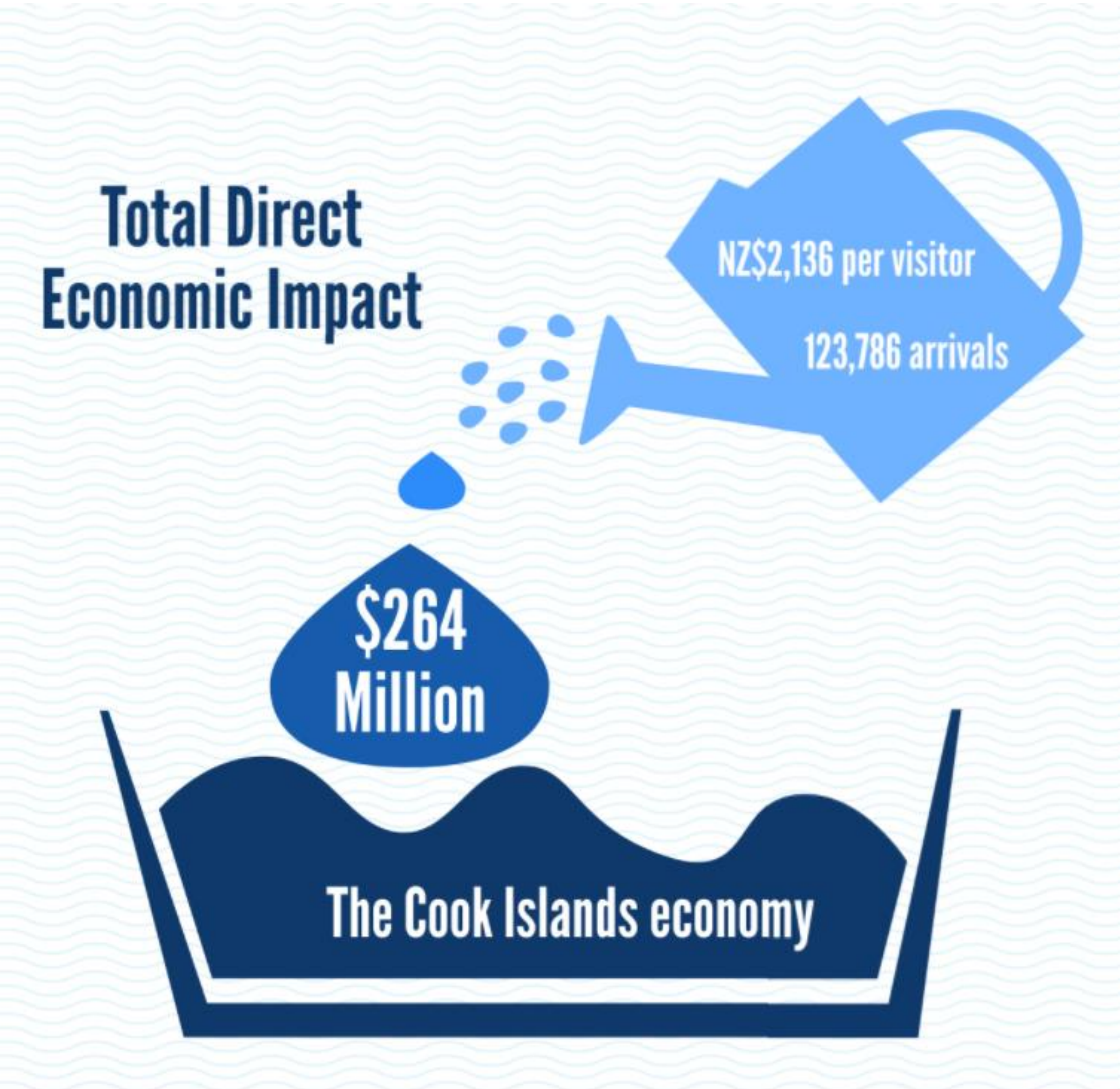
Table 11: Future intentions across 1-3 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	Average
Return to Cooks				
Yes:	93%	93%	89%	**92%**
Like to include other islands next trip				
Yes:	44%	45%	52%	**47%**
Maybe:	53%	51%	44%	**49%**
Recommend Cooks				
Yes:	97%	97%	97%	**97%**

CONCLUSIONS

The Cook Islands tourism industry continued to perform well during the July 2019 - March 2020 period. Based on the average spend of $2,136 per visitor ($1,316 on island + $820 pre-paid), we are able to provide an estimate of the direct economic value of tourism to the Cook Islands economy. Thus, every 10,000 tourists generate NZ$13,160,000 in on-island spend, plus an estimated NZ$8,200,000 in pre-paid spend (a total of $21.36 million). In total the 123,786 international arrivals from July 2019 to June 2020 injected $264 million into the local economy (Figure 16).

Figure 16: Total direct economic impact



The tourism industry makes a vital, and often undervalued contribution to the Cook Islands economy. Nevertheless, it is essential that further efforts be made to enhance yield per visitor. Such an approach not only creates more jobs and income for Cook Islanders, it also, inevitably rests on enhancing the visitor experience. A higher yield, value added, approach is particularly critical in the age of COVID-19. International visitor numbers will be relatively low for some time to come, and it will be important to find ways to maximize economic linkages for each visitor – whether they be VFR, business travellers, back packers or resort guests.

While COVID-19 presents challenges for the Cook Islands, it also provides an opportunity to reflect on themes and issues that can be addressed while the industry has an enforced 'breather'. As with previous reports, significant numbers of international visitors perceive that 'public services & facilities' are lacking. Visitors also mentioned environmental degradation although this factor is not as dominant as it once was. A continued focus on mitigating these and other issues will prove beneficial to the tourism industry in the Cook Islands, and to the local community.

This report highlights that cost-effective on-line research can generate strong response rates and robust information that is of value to both the tourism industry and government policy makers. Having a total of more than 8 years of international visitor data to analyse and 'mine' places the Cook Islands in a very powerful position relative to its competitors. The fact that the survey will continue through 2021 and beyond, means that future industry marketing and development decisions can continue to be based on a firm foundation of knowledge. Such evidence-based approaches to rebuilding tourism are vital in the wake of COVID-19 will be critical to guiding and measuring the development of a high performing tourism industry, one that meets the needs of host and guest alike.