

THE COOK ISLANDS

INTERNATIONAL VISITOR SURVEY REPORT

January – March 2023

Prepared for Cook Islands Tourism Corporation



Key Notes

- IVS data from January to March 2023 are analysed to understand the visitor experience and gain insights into tourism recovery after the border reopening.
- Key comparisons are carried out between the January - March 2020 IVS data and the January - March 2023 IVS data.
- Key results include visitor profile and characteristics, decision-making, spending, satisfaction and COVID-19 responses.
- All reports from the IVS are available at the [Pacific Tourism Data Initiative Resource Page](#)

SUMMARY OF KEY FINDINGS 2020 vs. 2023

Jan-Mar 2020

COUNTRY OF ORIGIN



6%
Visitors are 70 years old or over.



3 ppl
Avg. number of travel companions.



59%
Visitors visited for the first time.



\$148,897
Average household income.

Note: NZ dollars.

Jan-Mar 2023

COUNTRY OF ORIGIN



12% ▲
Visitors are 70 years old or over.



3 ppl
Avg. number of travel companions.



45% ▼
Visitors visited for the first time.



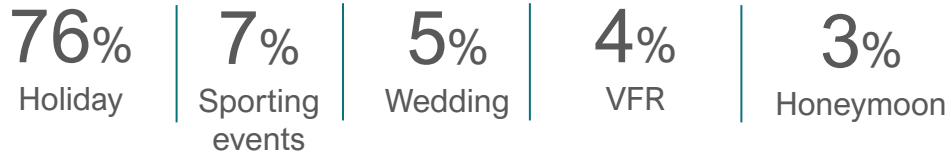
\$154,882 ▲
Average household income.

SUMMARY OF KEY FINDINGS 2020 vs. 2023

Jan-Mar 2020



PURPOSE OF VISIT



4.6/5

Overall, visitors are very satisfied.



97%

Visitors are willing to recommend.



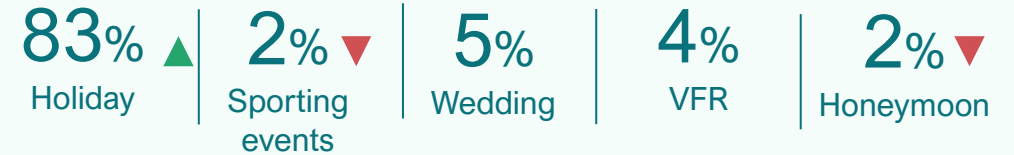
89%

Visitors are willing to return.

Jan-Mar 2023



PURPOSE OF VISIT



4.7/5 ▲

Overall, visitors are very satisfied.



97%

Visitors are willing to recommend.



94% ▲

Visitors are willing to return.

SUMMARY OF KEY FINDINGS 2020 vs. 2023

Jan-Mar 2020

 **PREPAID EXPENDITURE**

\$2,179

Prepaid per trip

40%

Flowing into local economy rate

\$872

Prepaid per trip

 **IN-COUNTRY SPEND**

\$166

In-country spend per day



X **8.8** nights
Average length of stay

\$1,461

In-country spend per trip

 **ECONOMIC IMPACT**

\$2,333 per trip

\$265 per day

Jan-Mar 2023

 **PREPAID EXPENDITURE**

\$2,705 ▲

Prepaid per trip

40%

Flowing into local economy rate

\$1,082 ▲

Prepaid per trip

 **IN-COUNTRY SPEND**

\$216 ▲

In-country spend per day



X **9.1** nights ▲
Average length of stay

\$1,966 ▲

In-country spend per trip

 **ECONOMIC IMPACT**

\$3,048 per trip ▲

\$335 per day ▲

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact



Visitor
Satisfaction

Respondents (Jan - Mar 2023)

Total number of e-mail invitations sent:
2,314



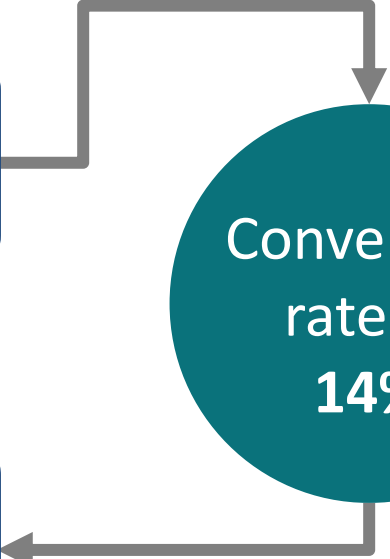
Total number of responses: **326**



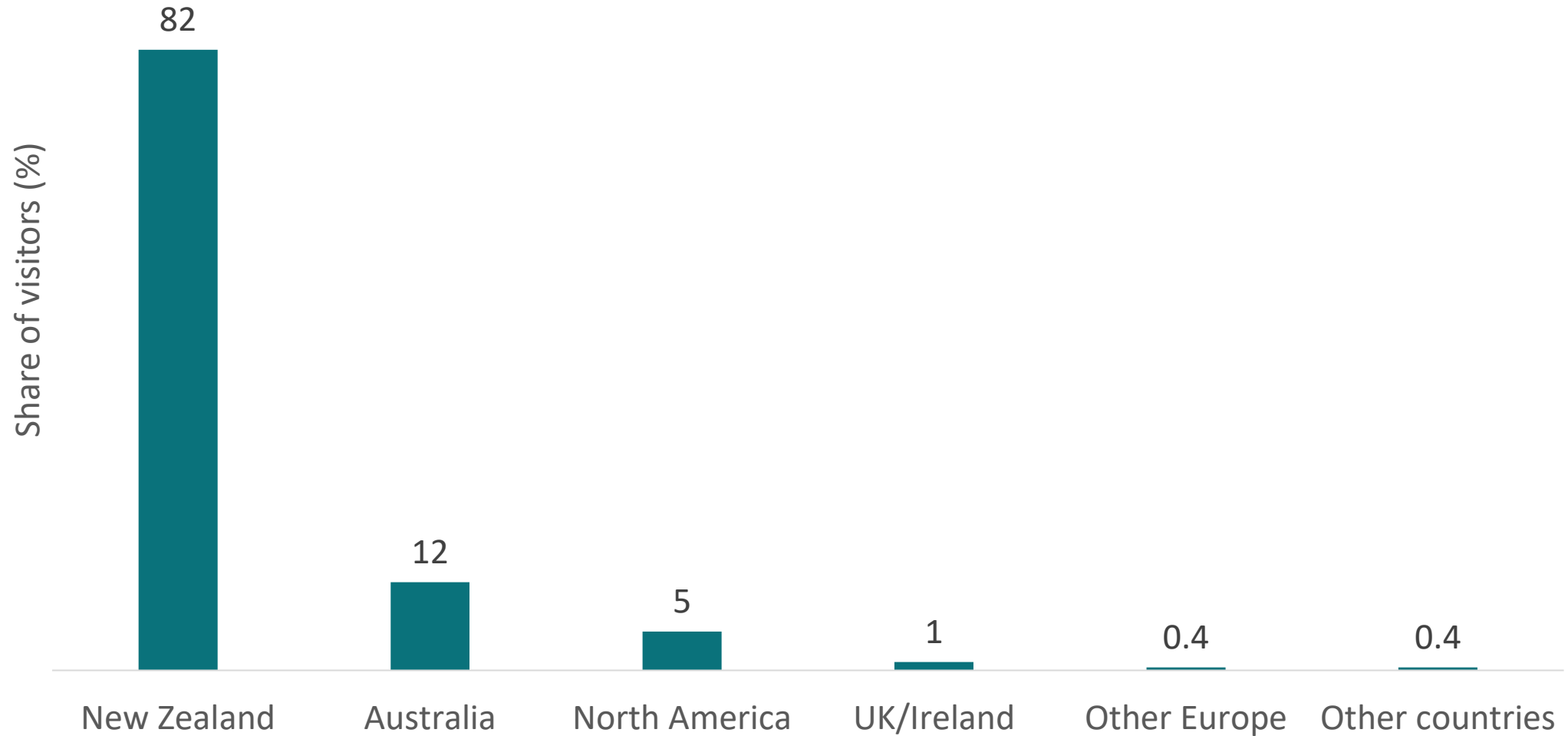
Responses cover a total of
607 adults and **99 children**



Conversion
rate of
14%

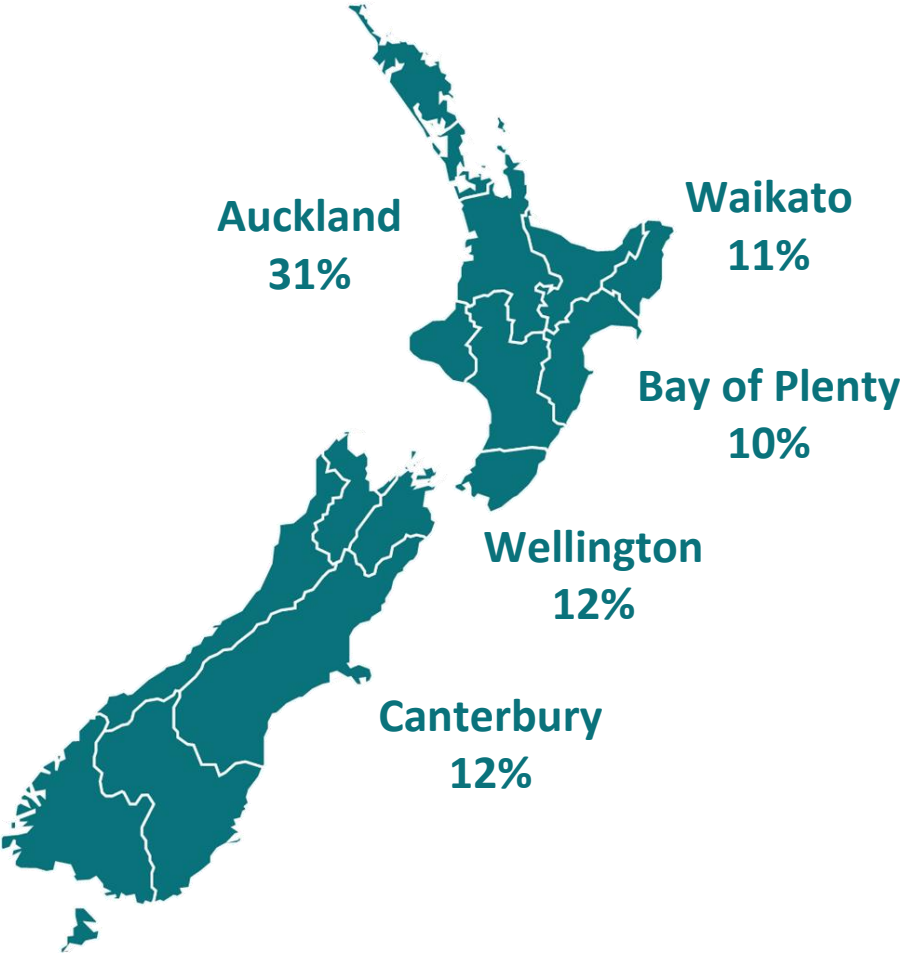


Country of Origin



Note: N = 276. Due to rounding, some totals do not sum to 100%.

New Zealand Respondents - IVS Respondent Data

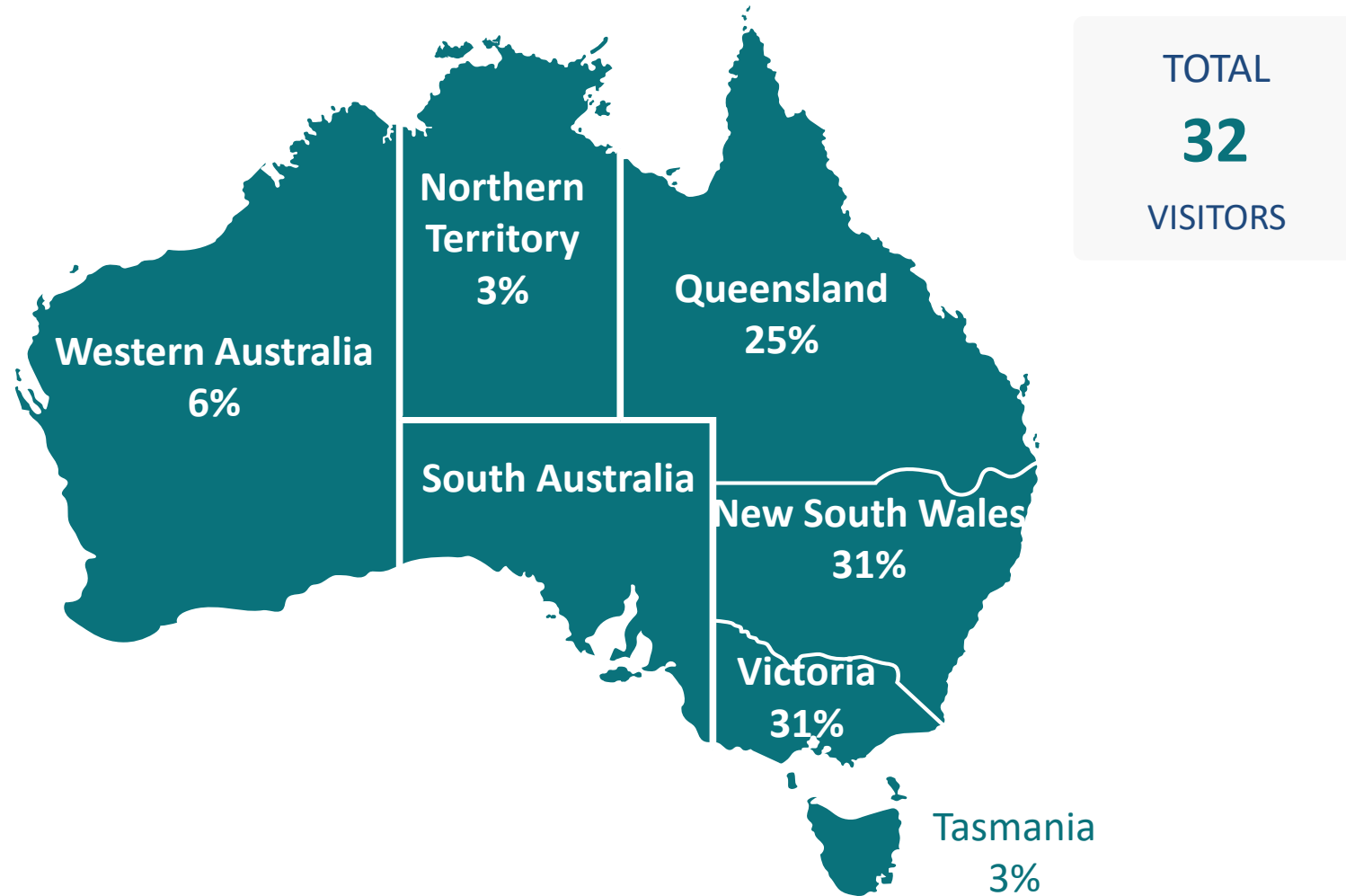


TOTAL
222
VISITORS

Auckland, Waikato, Wellington, Canterbury, and Bay of Plenty make up **76%** of all New Zealand visitor arrivals

Note: N = 222. Due to rounding, total does not sum to 100%

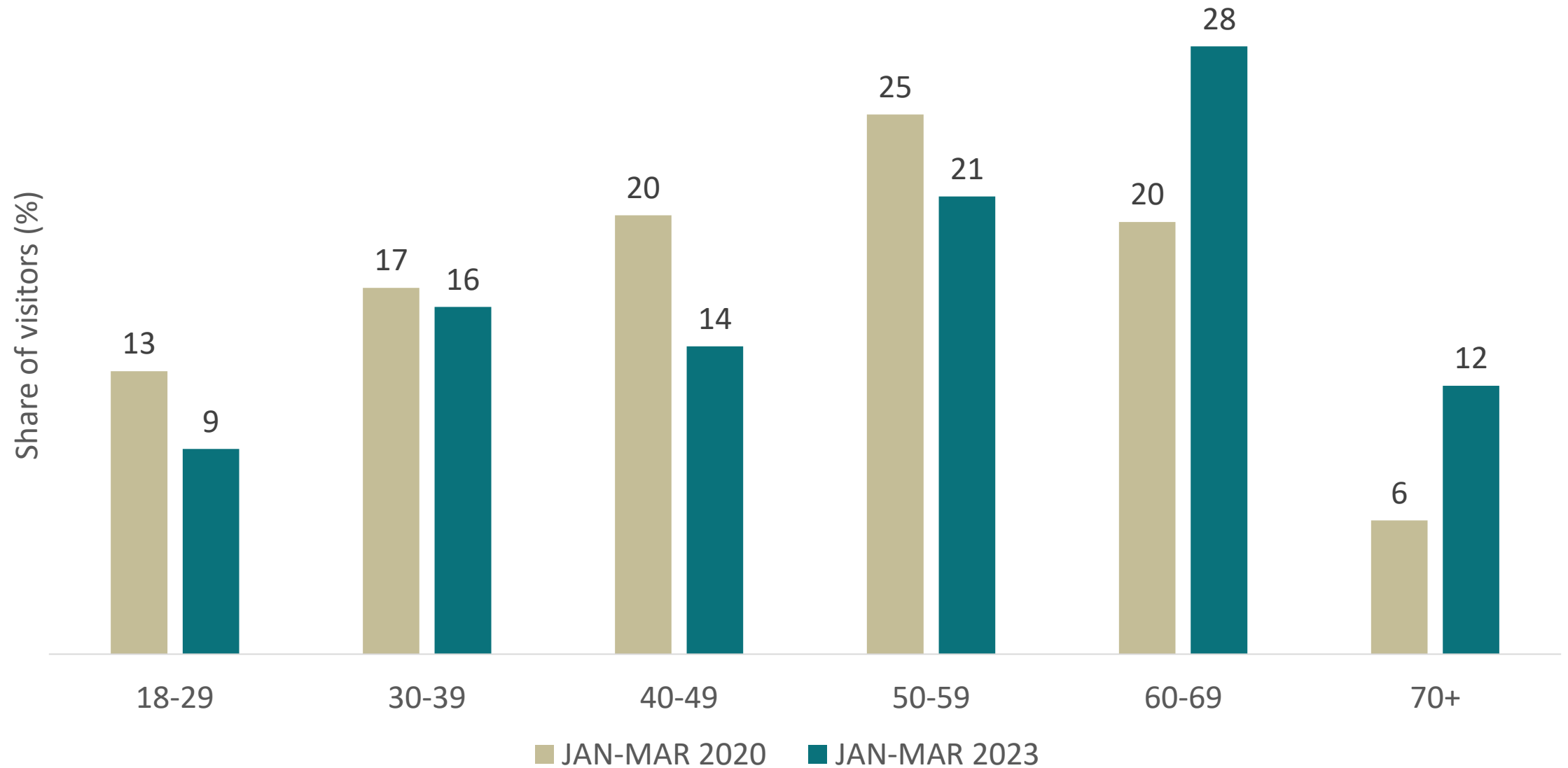
Australian Respondents - IVS Respondent Data



New South Wales, Victoria and Queensland make up **87%** of all Australian visitor arrivals

Note: N = 32. Due to rounding, total does not sum to 100%

Age



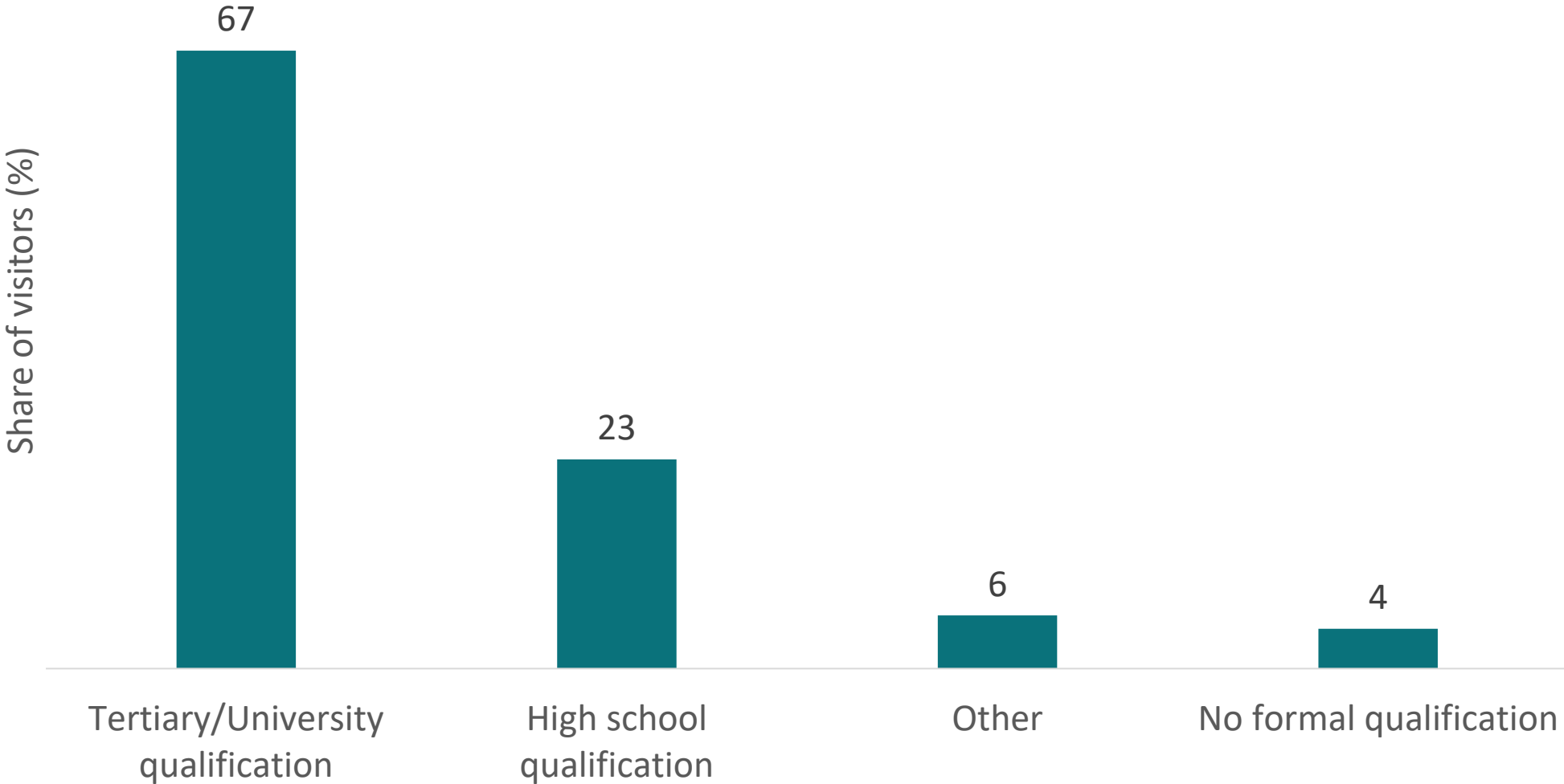
Note: N = 871 for Jan-Mar 2020; N = 278 for Jan-Mar 2023. Due to rounding, total does not sum to 100%

Gender



Note: N = 278. Due to rounding, total does not sum to 100%

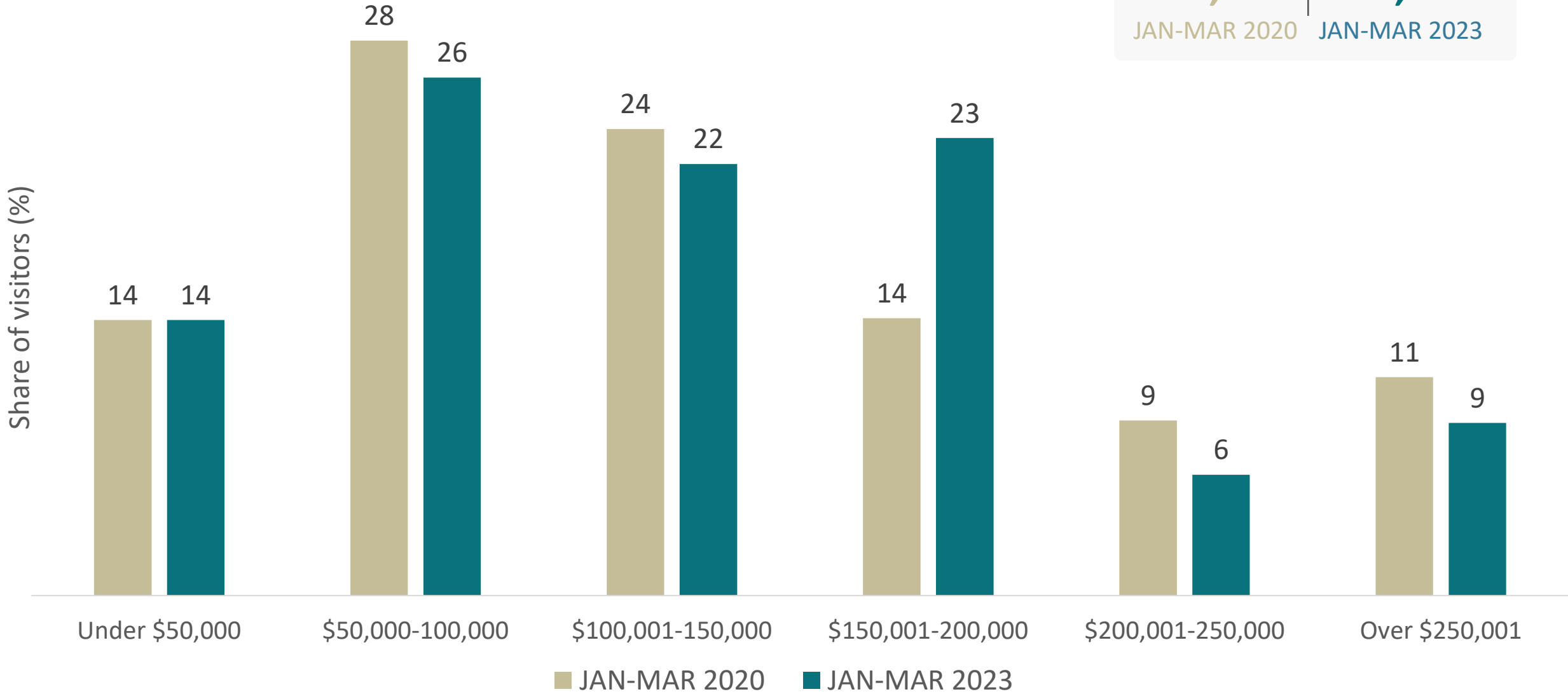
Education



Note: N = 277. Due to rounding, total does not sum to 100%

Annual Household Income

Avg. Household Income
148,897 | **154,882**
JAN-MAR 2020 | JAN-MAR 2023



Note: N = 687 for Jan-Mar 2020; N = 228 for Jan-Mar 2023. Due to rounding, total does not sum to 100%

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

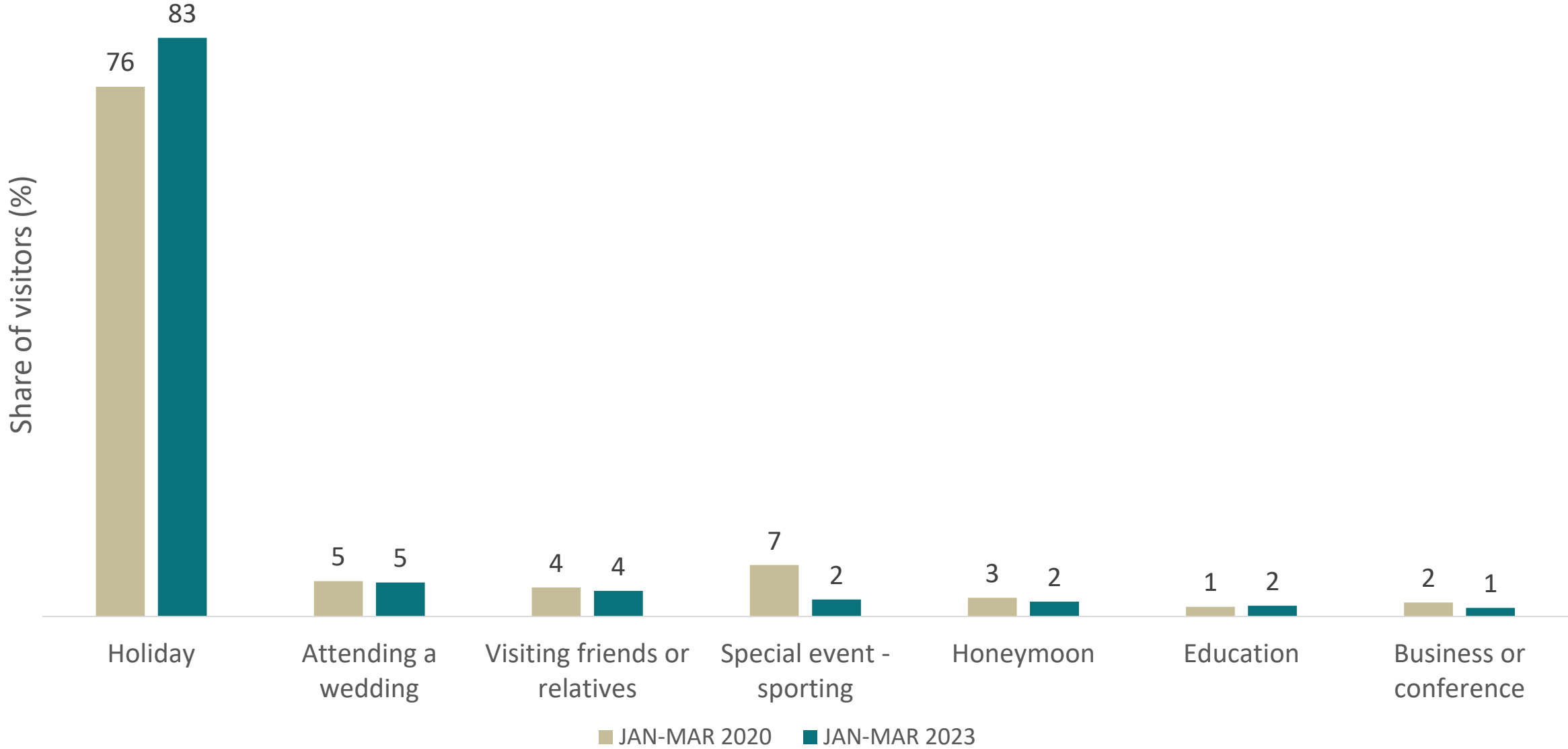


Visitor Spending
& Impact



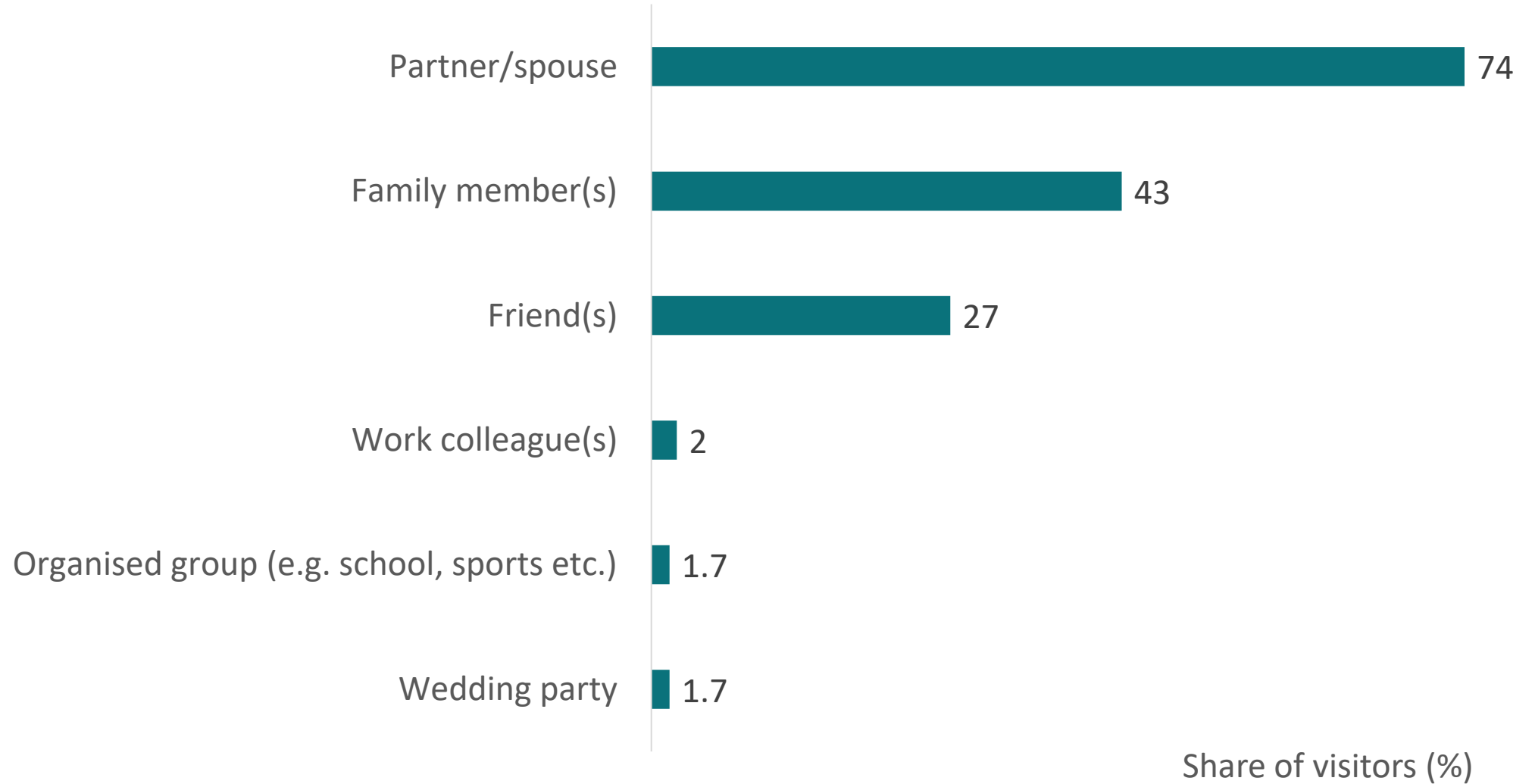
Visitor
Satisfaction

Purpose of Visit



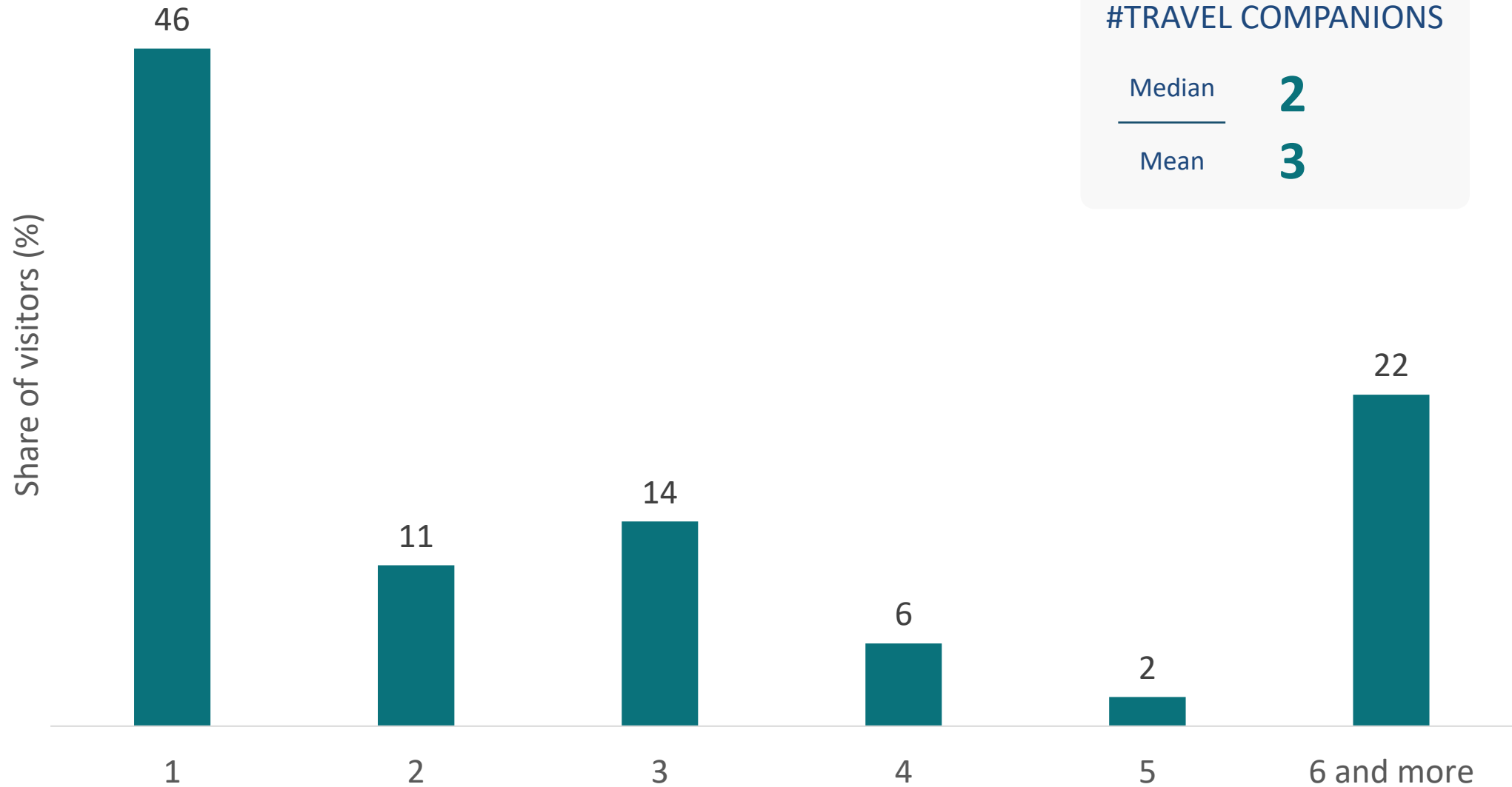
Note: N = 989 for Jan-Mar 2020; N = 326 for Jan-Mar 2023. Due to rounding, total does not sum to 100%

Travel Companions



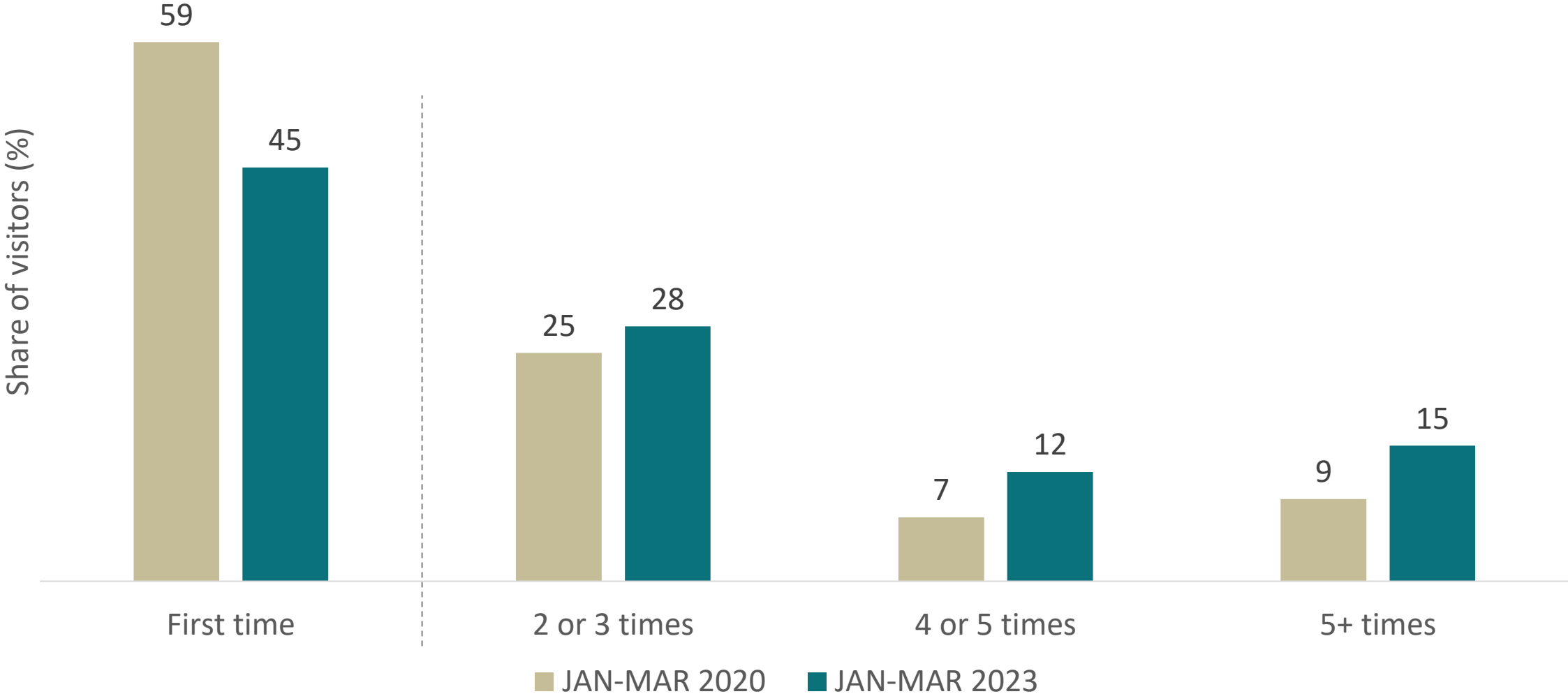
Note: N = 303. Multiple responses, therefore total does not add up to 100%

Number of Travel Companions



Note: N = 305 (excluding those travelling alone N = 21). Due to rounding, total does not sum to 100%

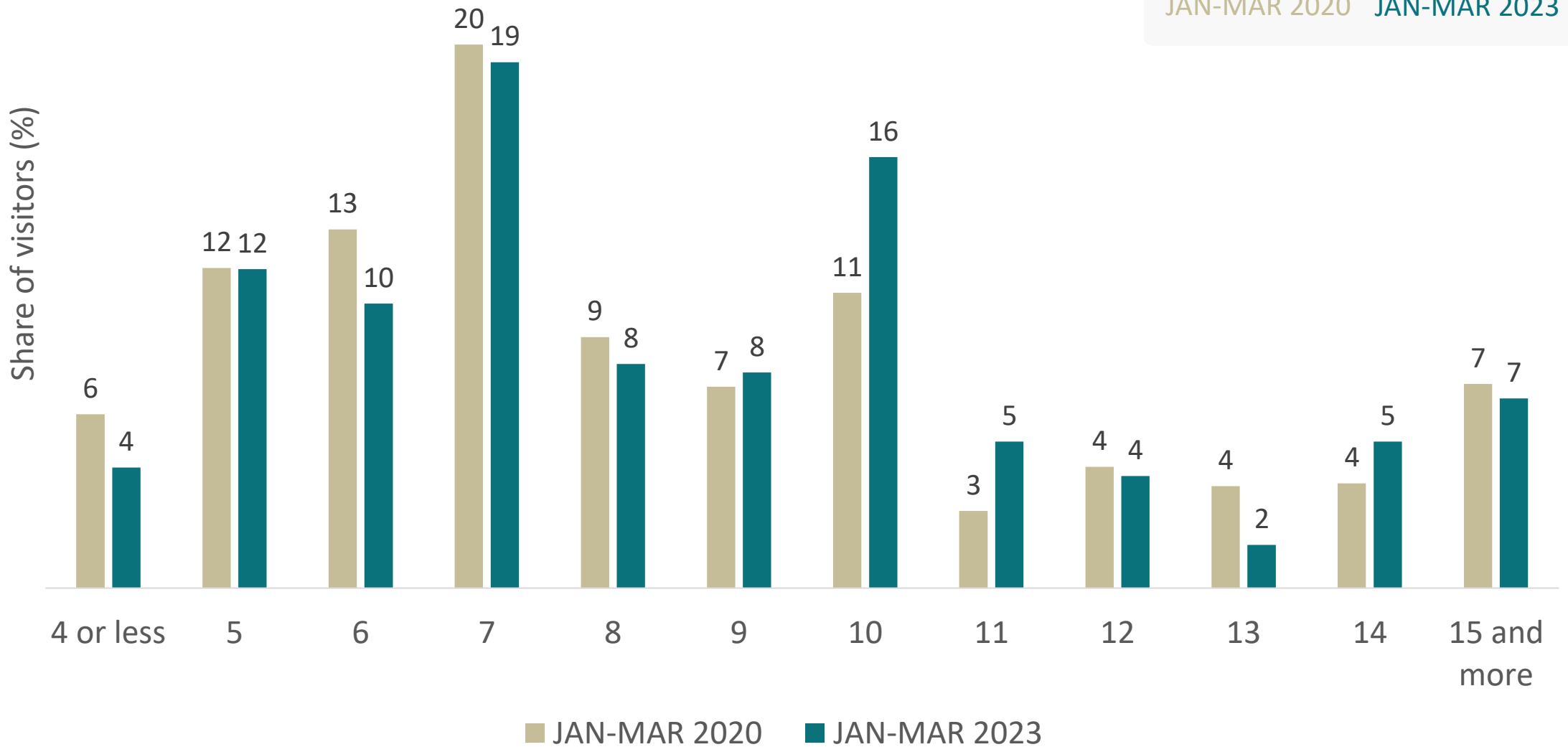
Previous Visits



Note: N = 877 for Jan-Mar 2020; N = 276 for Jan-Mar 2023. Due to rounding, total does not sum to 100%

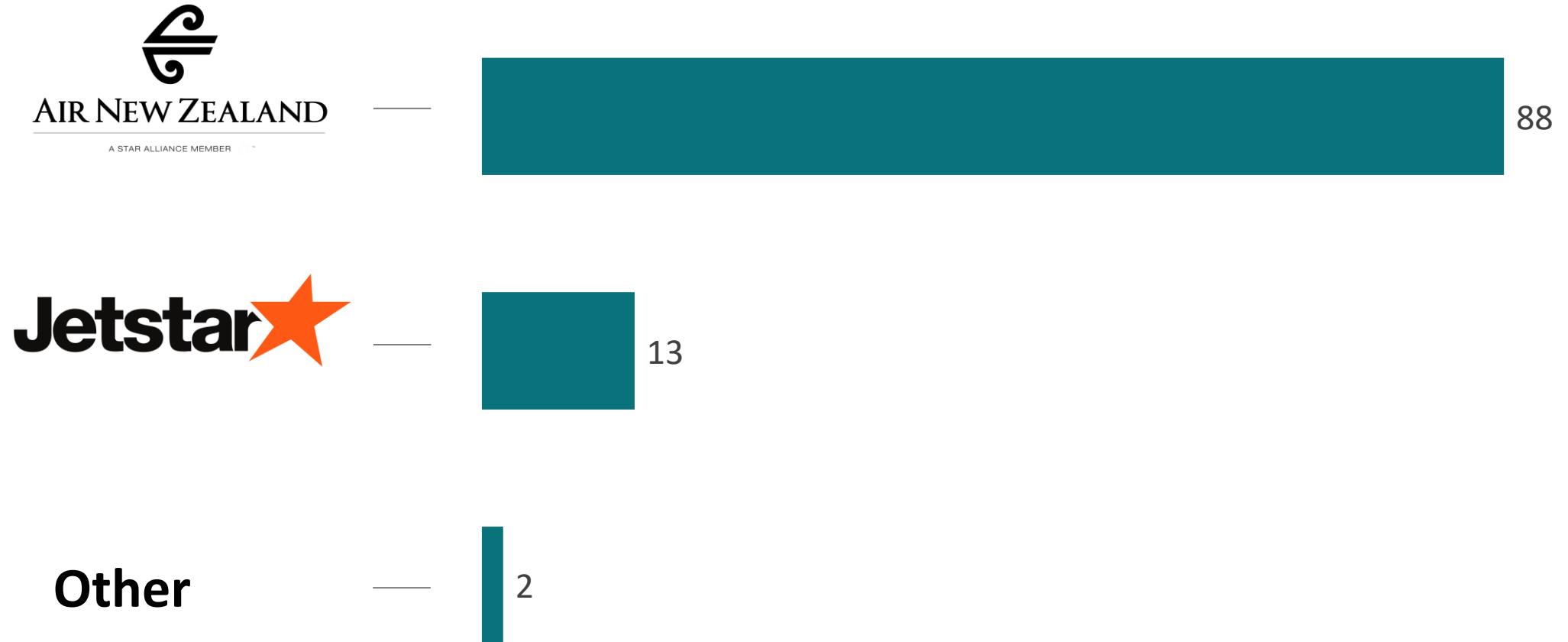
Length of Stay (nights)

Avg. Length of Stay (nights)
8.8 | **9.1**
JAN-MAR 2020 | JAN-MAR 2023



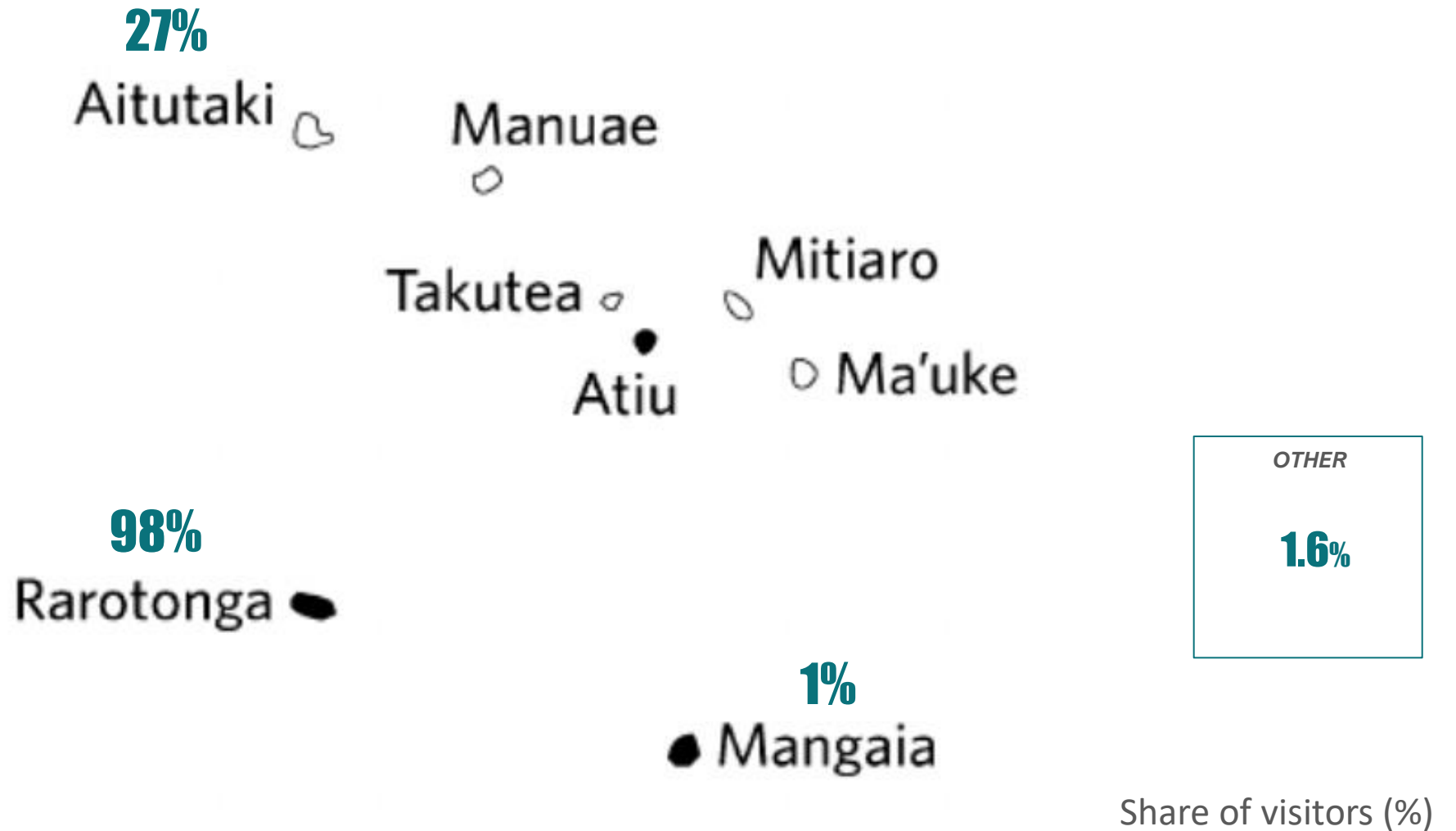
Note: N = 972 for Jan-Mar 2020; N = 320 for Jan-Mar 2023. 31 and 31+ days as outliers were removed for length of stay analysis.

Airlines Used for Travel



Share of visitors (%)

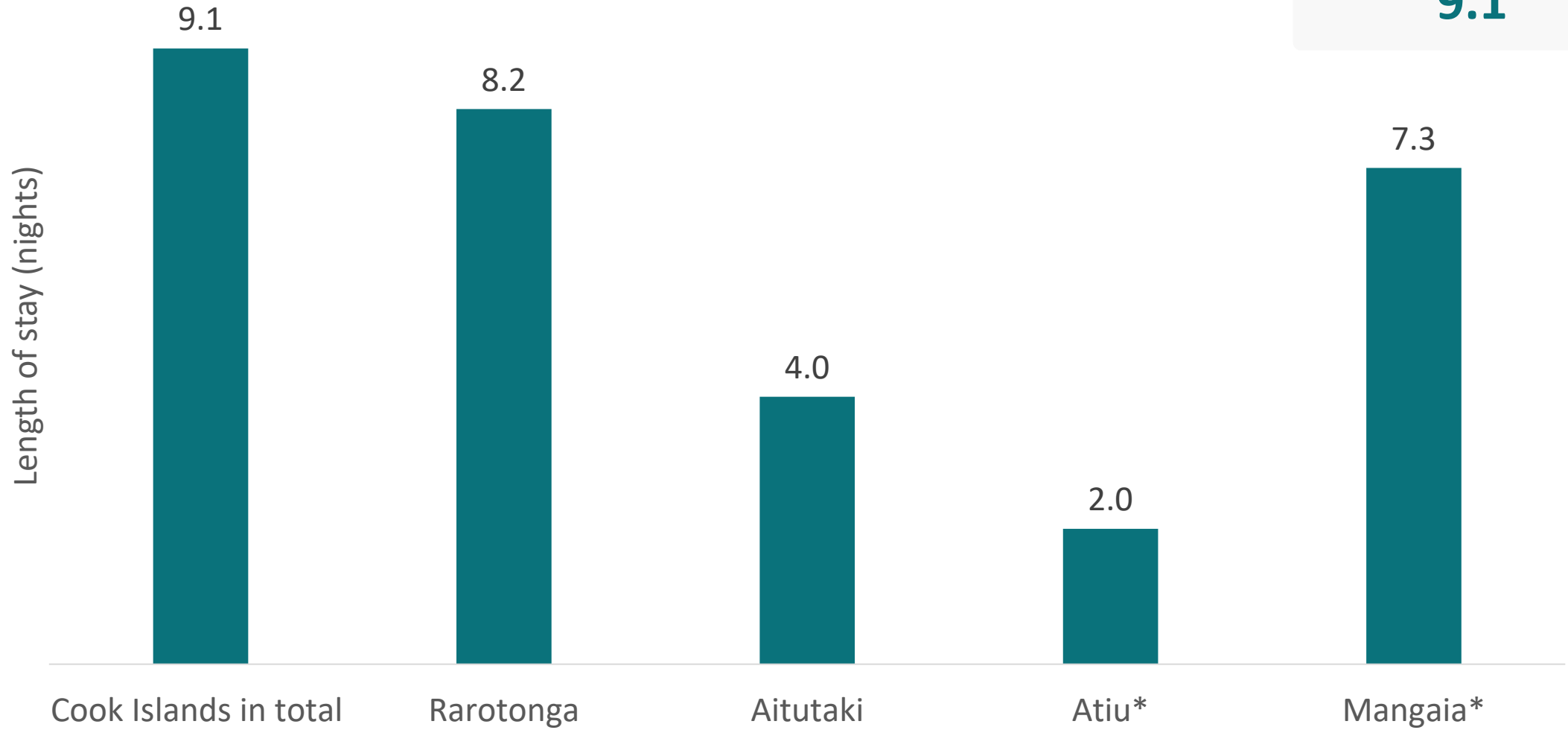
Islands Visited



Average Length of Stay on Each Island (Nights)

Avg. Length of Stay
(Cook Islands in total)

9.1



Note: *: n <=3

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

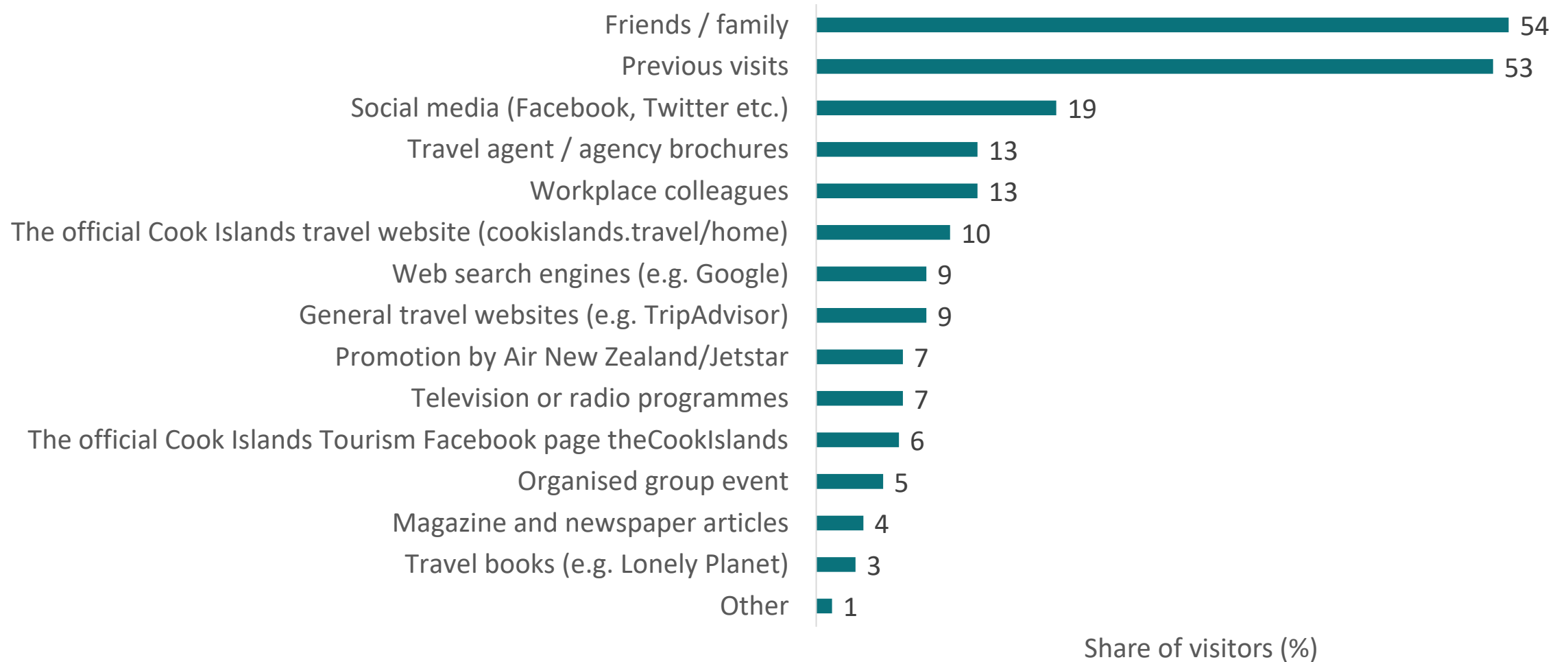


Visitor Spending
& Impact

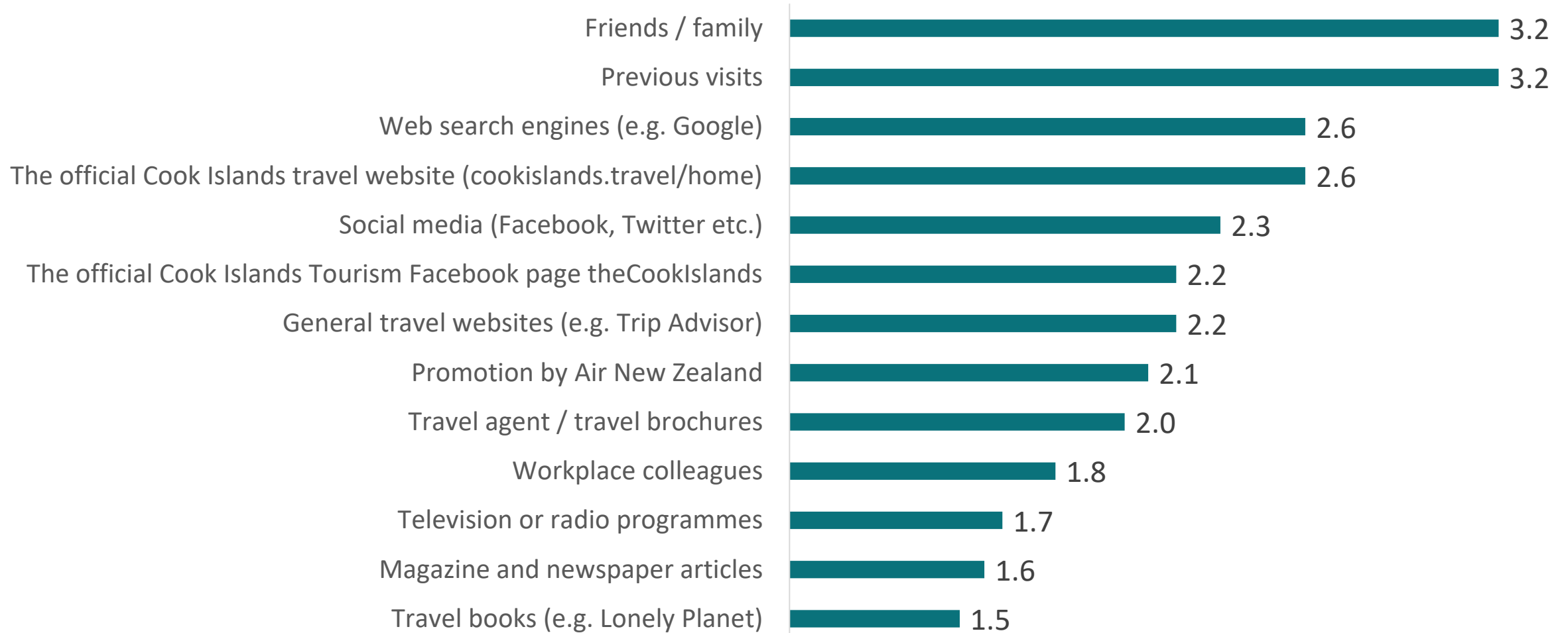


Visitor
Satisfaction

Information Source: How did you find out about the Cooks Islands as a destination?

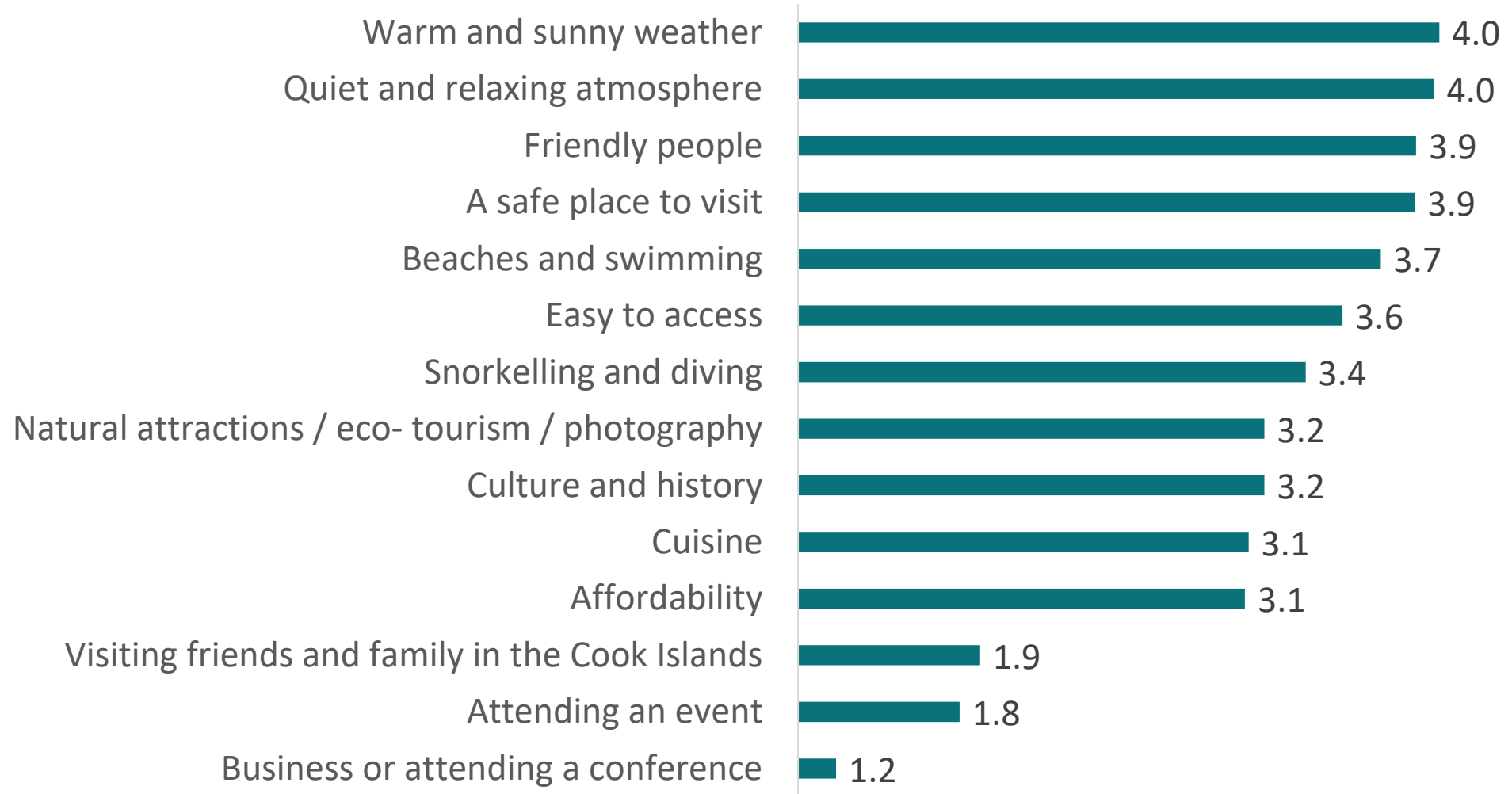


Information Source: How important was the information source when planning your trip?



Scale: 1=Not at all important to 5=Extremely important

Influential factors on the decision to choose the Cook Islands

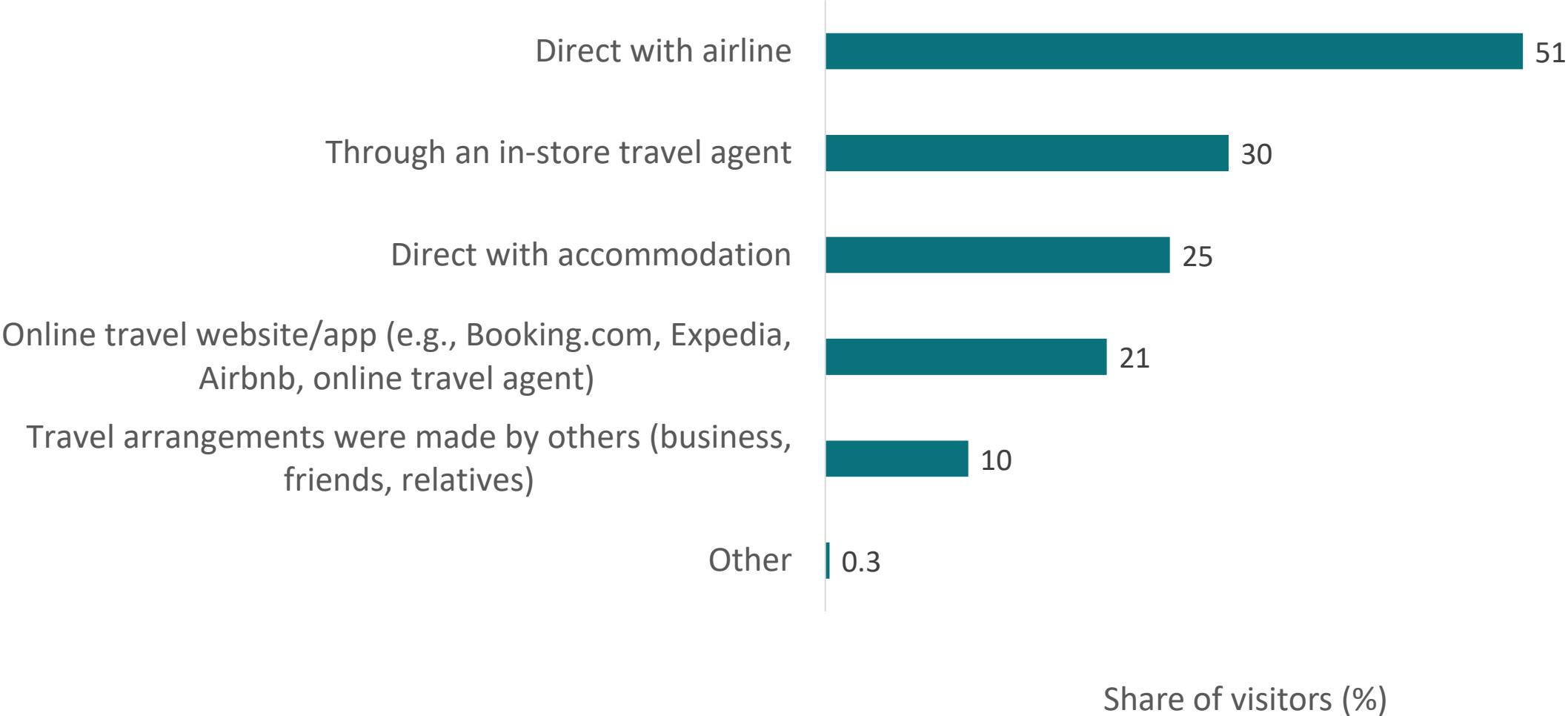


Scale: 1=Not at all important to 5=Extremely important

Important factors on the decision to travel to the Cook Islands



Purchasing of Travel



Note: N = 324. Multiple responses, therefore total does not add up to 100%

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact



Visitor
Satisfaction

Prepaid Expenditure

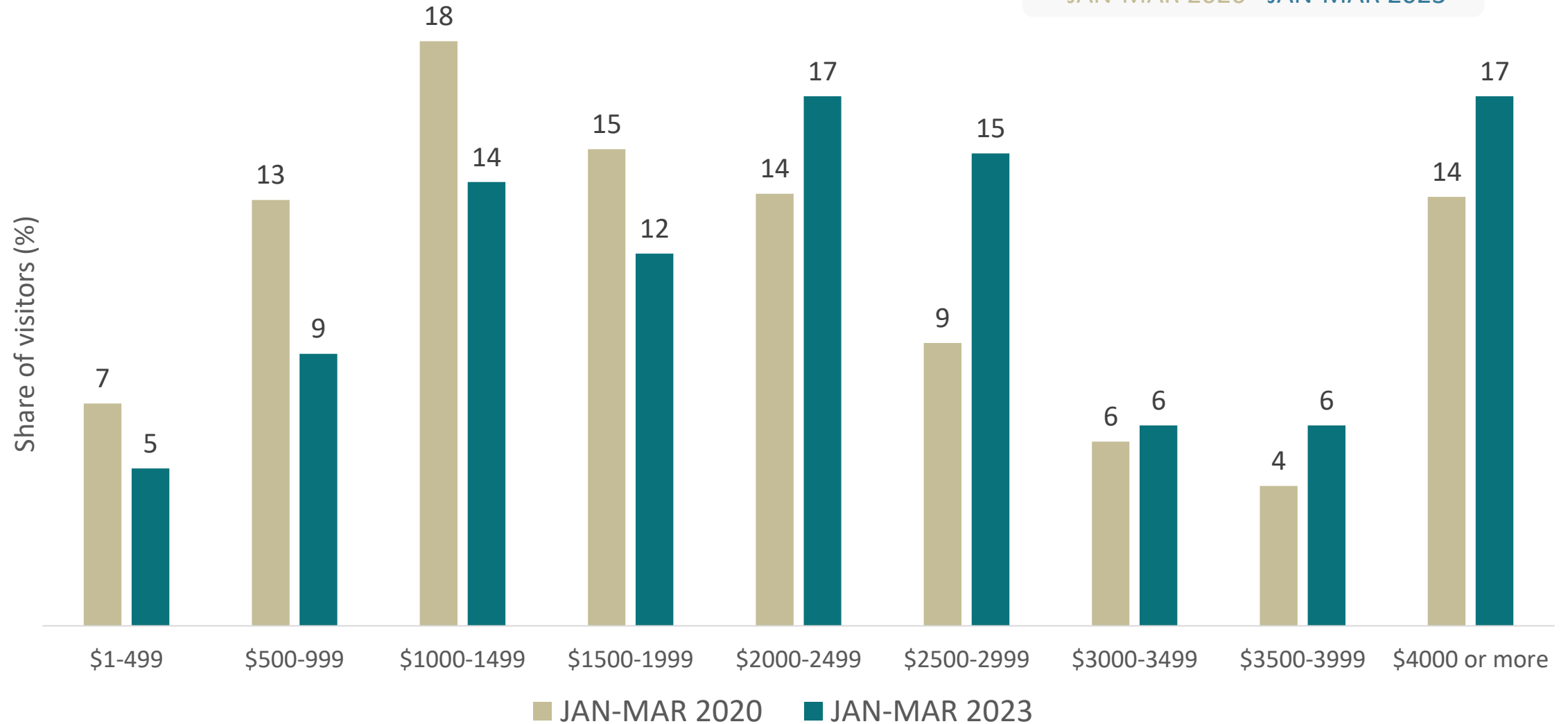
AVG. PREPAID PER PERSON

2,179

2,705

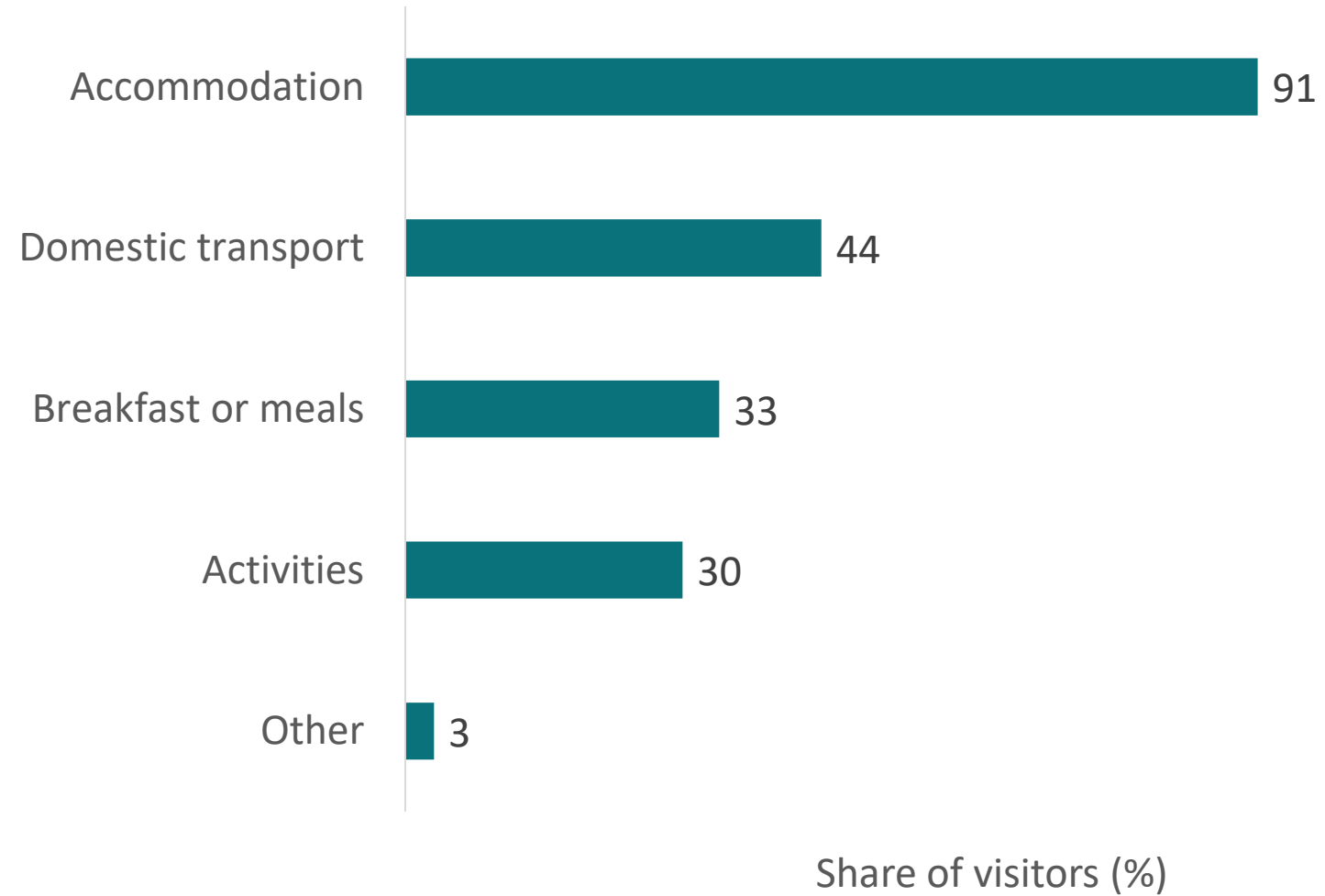
JAN-MAR 2020

JAN-MAR 2023



Note: N = 711 for Jan-Mar 2020; N = 222 for Jan-Mar 2023. Average exchange rate NZD from January to March 2023 applied.

Prepaid Items



In-country Spend Per Person Per Day While in the Cook Islands

	Jan-Mar 2020		Jan-Mar 2023	
	<u>Per Person Per Day</u>	<u>% of sector</u>	<u>Per Person Per Day</u>	<u>% of sector</u>
Accommodation	68	41	79	36
Restaurants, Cafes & Bars	34	20	69	32
Vehicle Rental	10	6	13	6
Petrol	2	1	2	1
Domestic flights	11	7	8	4
Public transportation	1	0	1	0.4
Internet cost	2	1	2	1
Activities	10	6	13	6
Groceries	9	5	9	4
Shopping	14	8	16	7
Other	5	3	4	2
Total	166		216	

Note: N = 931 for Jan – Mar 2020; N = 294 for Jan – Mar 2023. Due to rounding, some totals do not sum to 100%.

Economic Impact – Per Person and Total

	Jan-Mar 2020	Jan-Mar 2023
Average Spend Prior to Arrival	NZD	NZD
Per Person Per Trip	2,179	2,705
<i>Flowing into local economy rate – estimated</i>	40%	40%
Per Person Per Trip	872	1,082
Per Person per Day	99	119
<hr/>		
Average Local Spend		
<i>Length of Study (nights) - mean</i>	8.8 nights	9.1 nights
Per Person Per Trip	1461	1966
Per Person per Day	166	216
<hr/>		
Total Economic Impact-Per Trip	2,333	3,048
Total Economic Impact-Per Day	265	335

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact



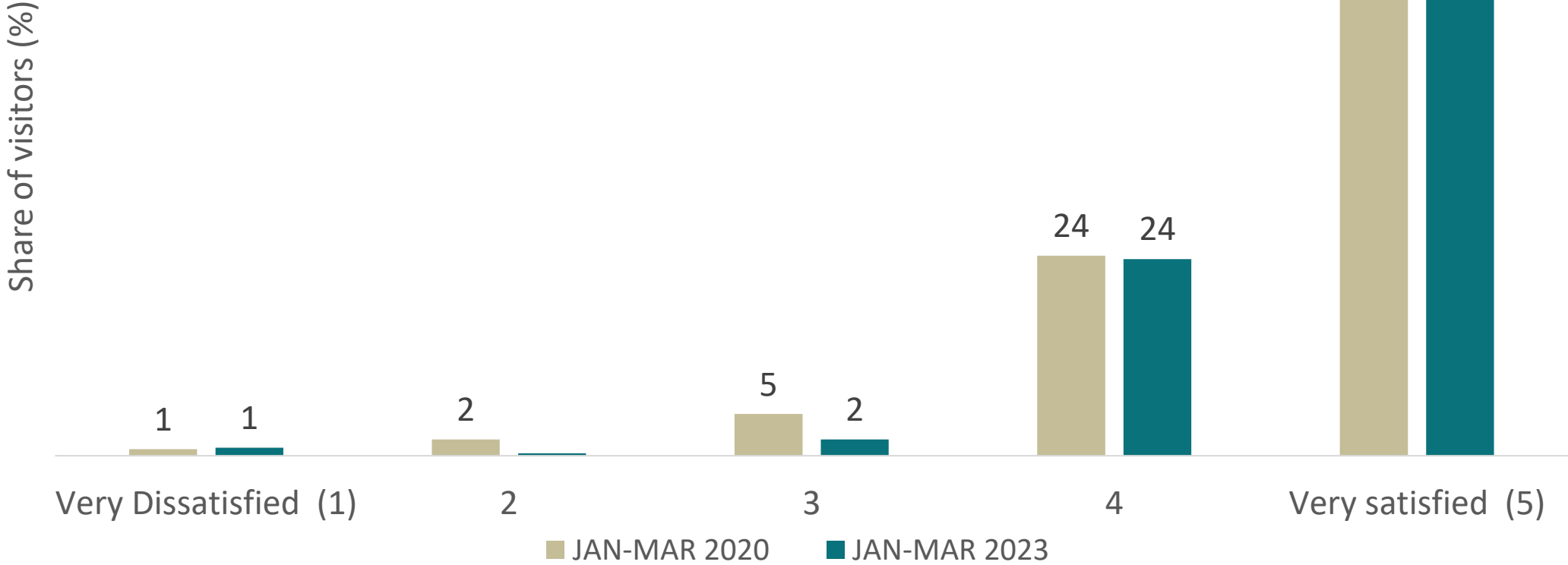
Visitor
Satisfaction

Visitor Overall Satisfaction

AVG. OVERALL SATISFACTION

4.6 | **4.7**

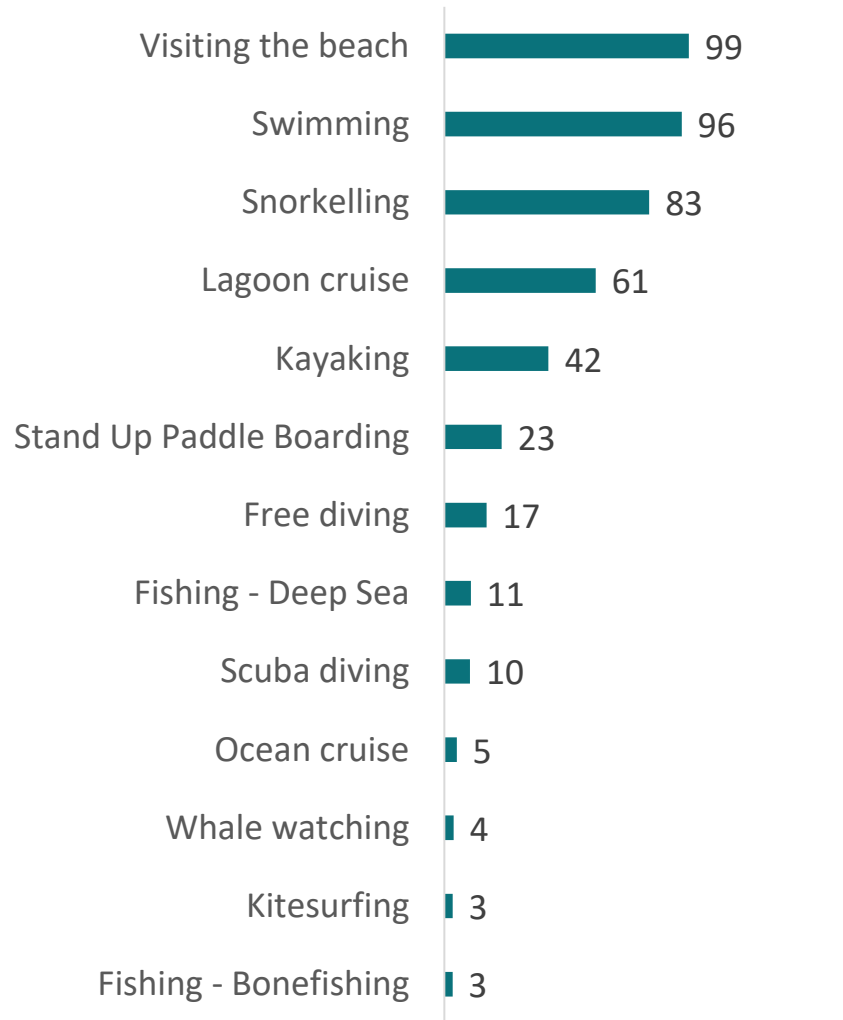
JAN-MAR 2020 | JAN-MAR 2023



Note: N = 283. Due to rounding, some totals do not sum to 100%.

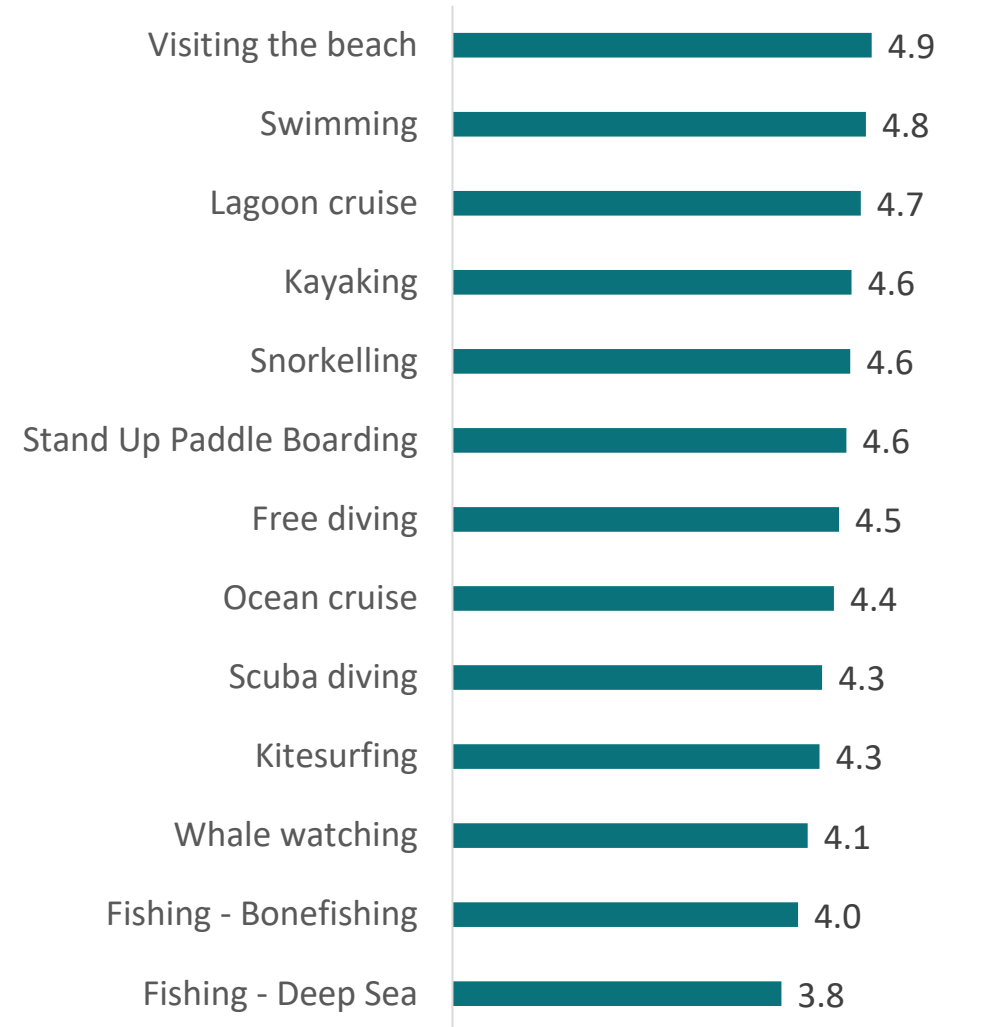
Water-based Activities

Participation



Share of Visitors (%)

Satisfaction

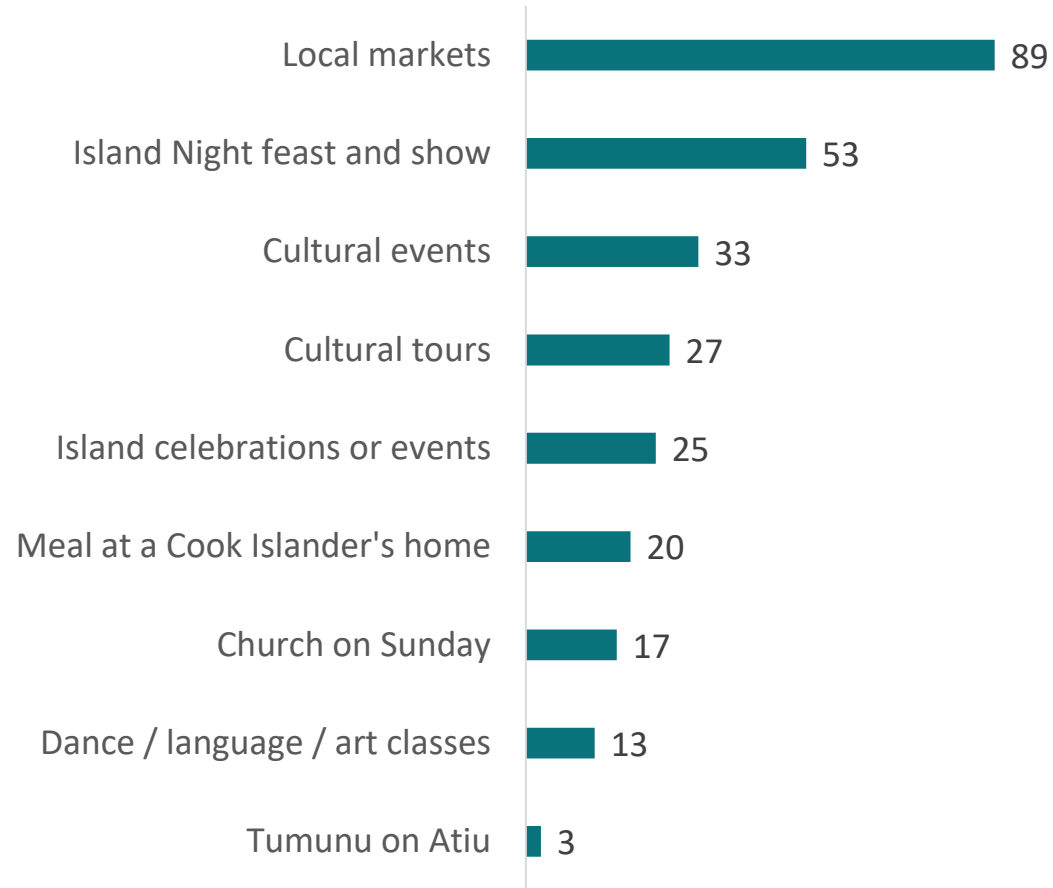


Scale: 1=Very dissatisfied to 5=Very satisfied

Note: N = 235 - 312. Multiple responses, so total does not add up to 100%

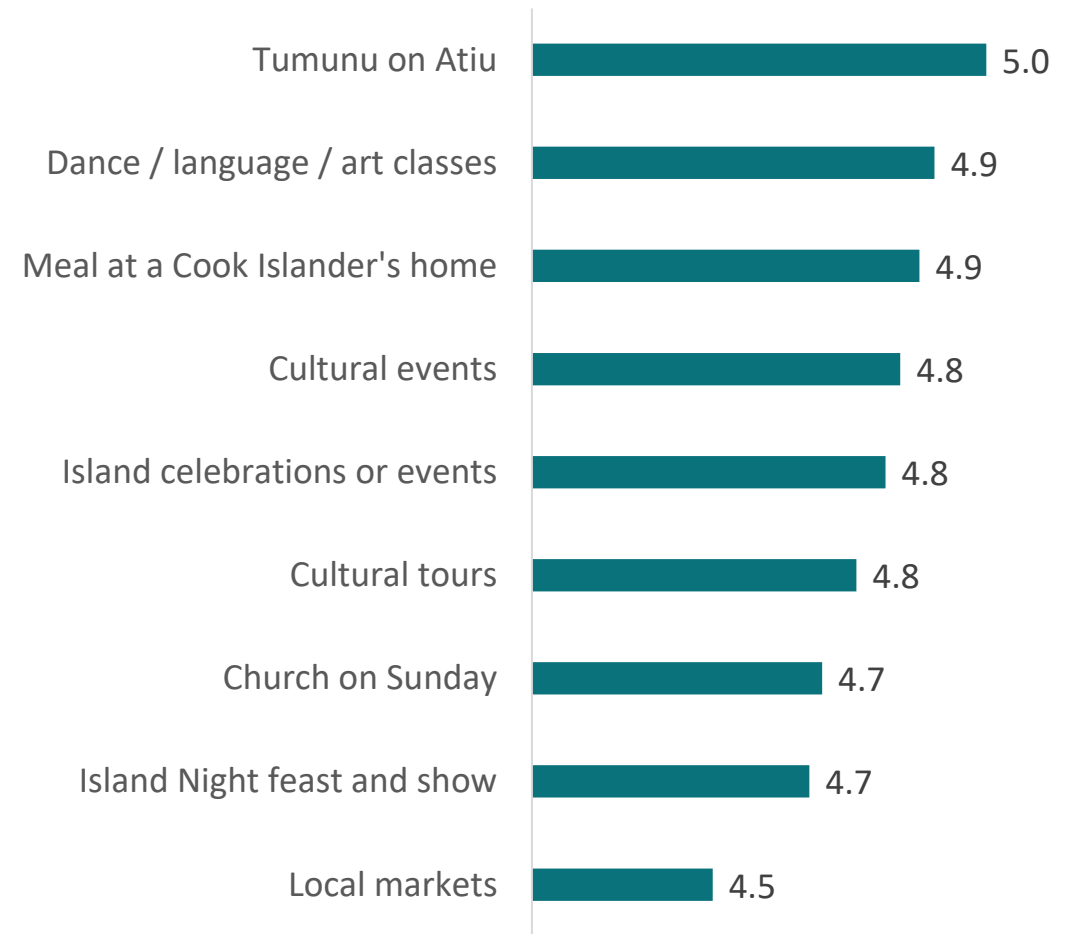
Cultural Interaction

Participation



Share of Visitors (%)

Satisfaction

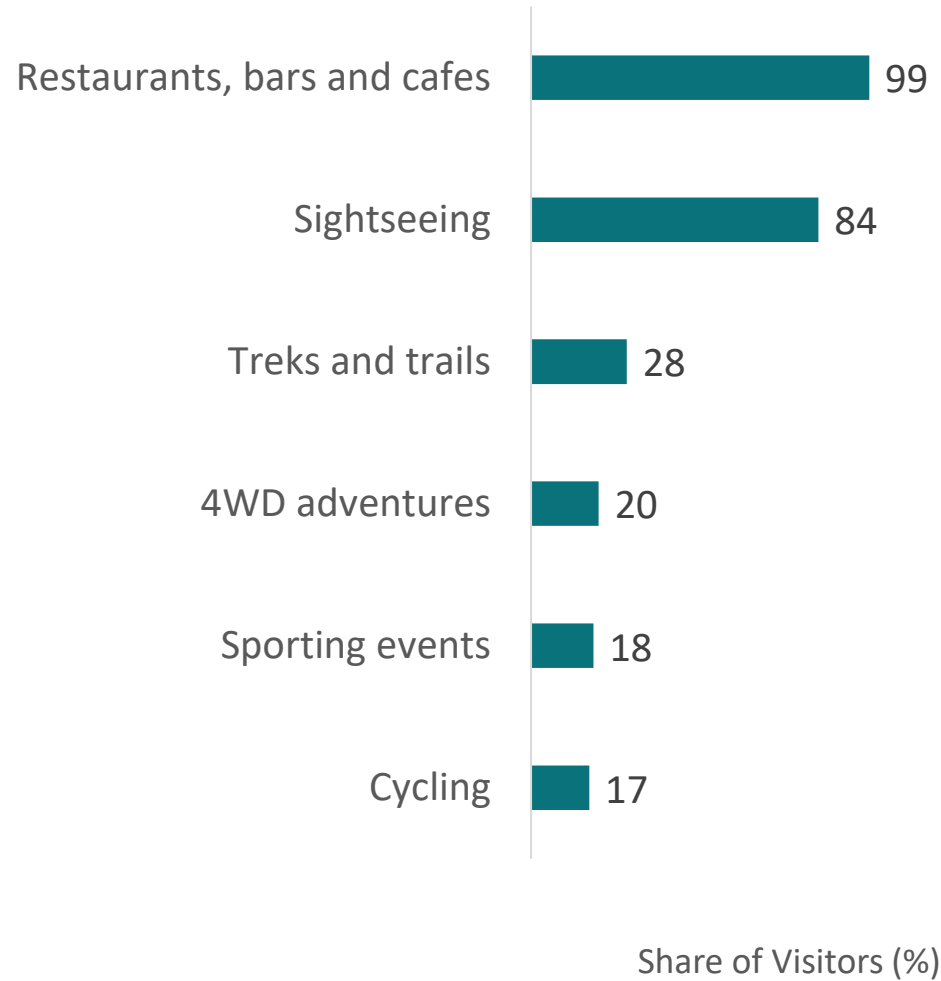


Scale: 1=Very dissatisfied to 5=Very satisfied

Note: N = 245 - 307. Multiple responses, so total does not add up to 100%

Land-based Activities

Participation



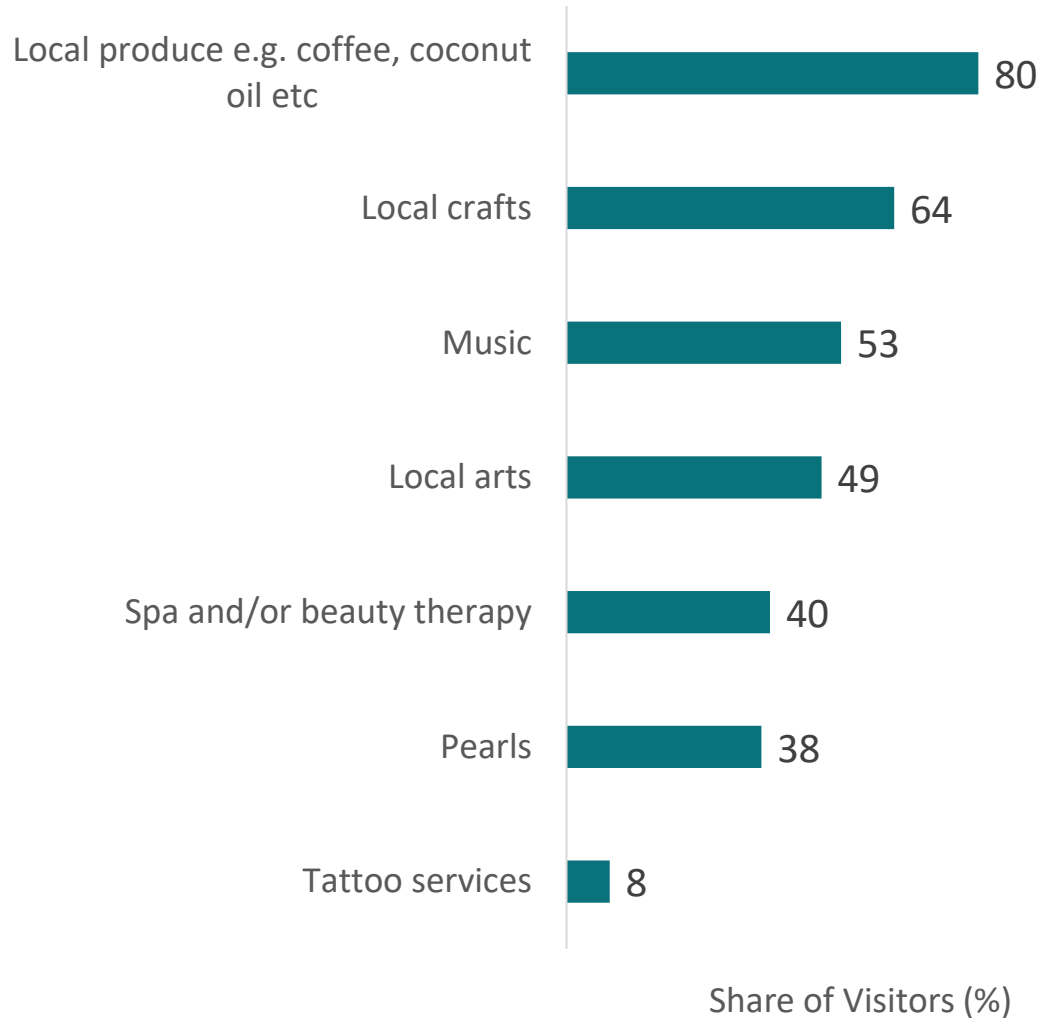
Satisfaction



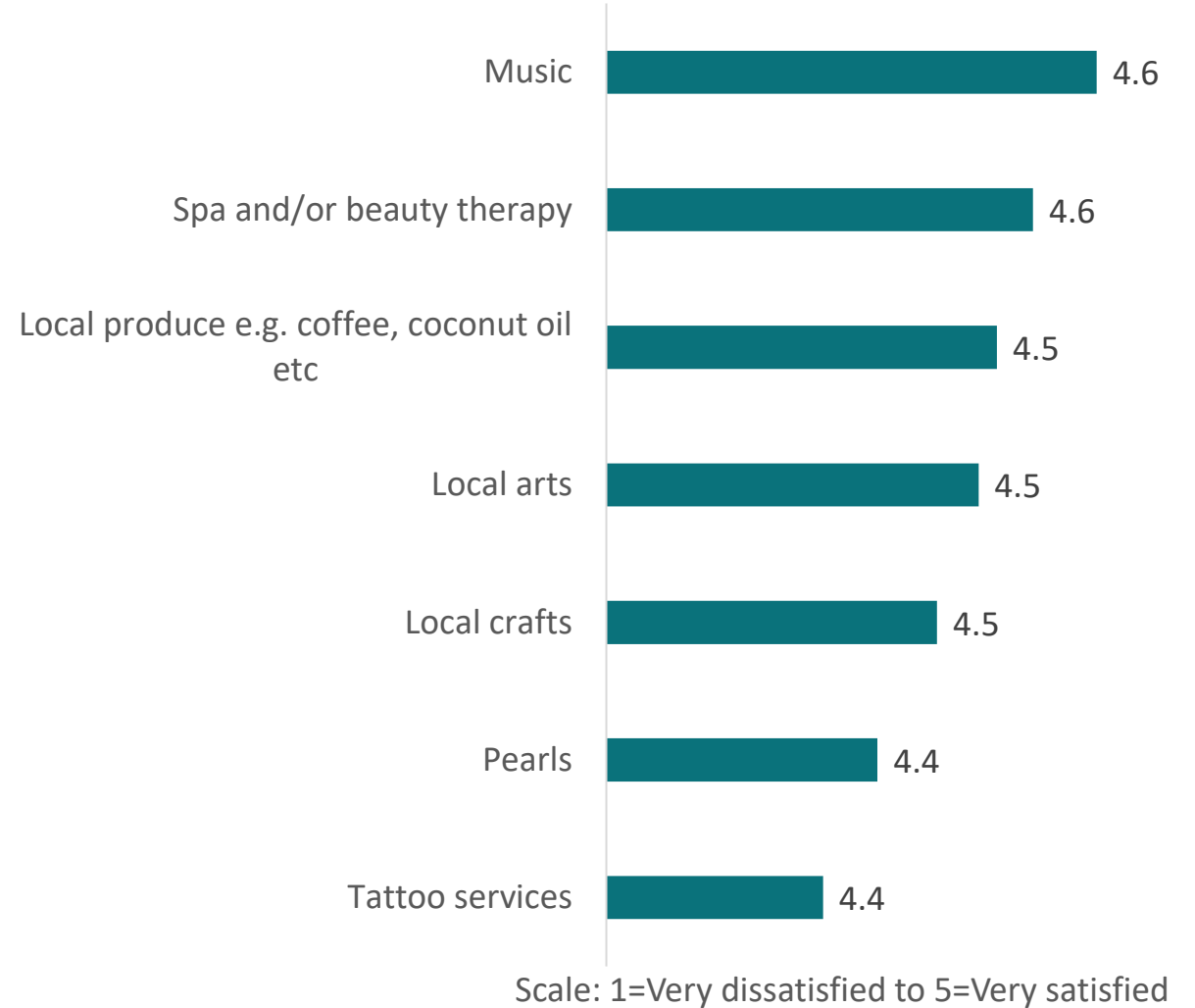
Note: N = 252 - 315. Multiple responses, so total does not add up to 100%

Shopping Activities

Participation

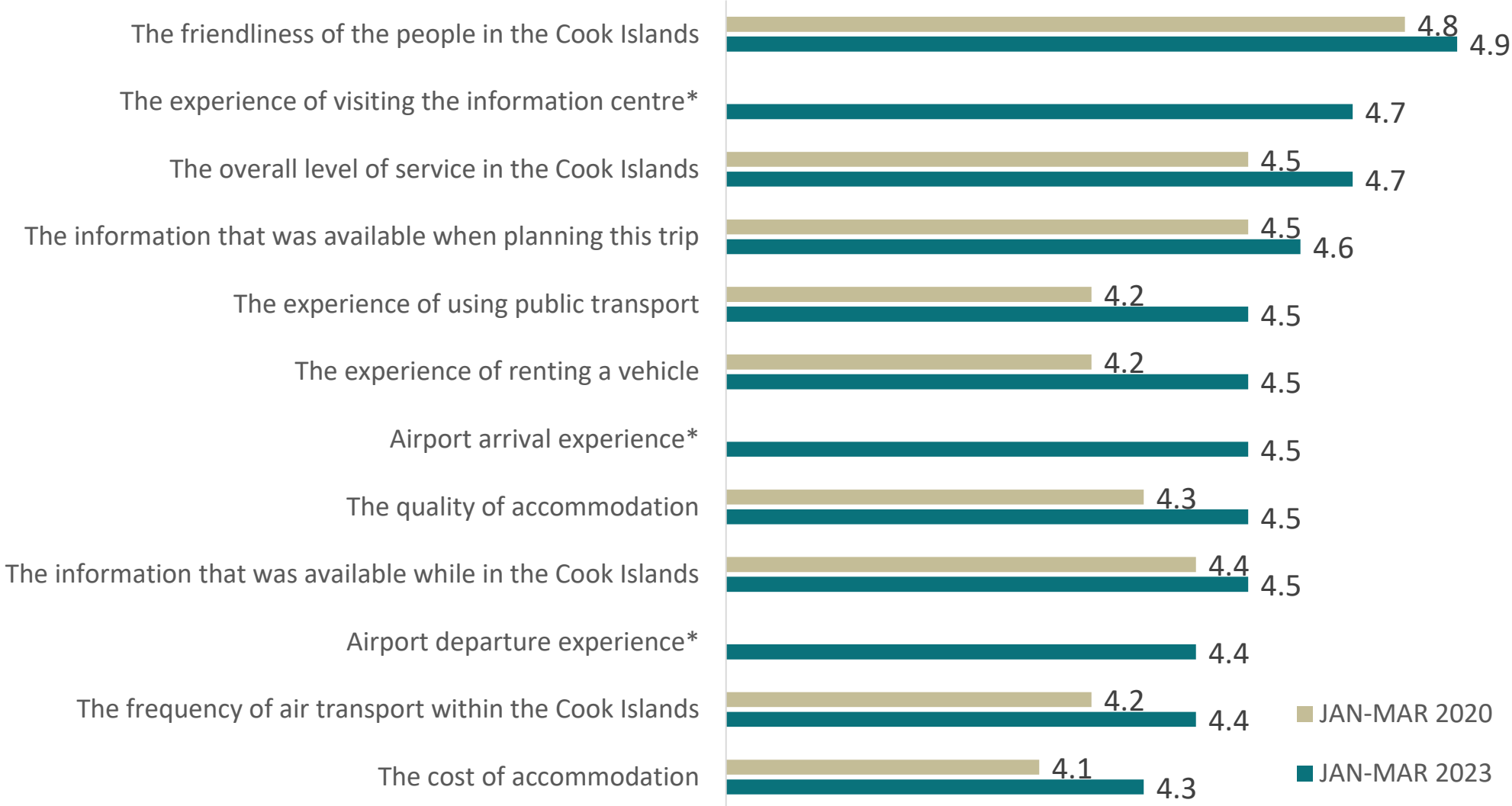


Satisfaction



Note: N = 275 - 294. Multiple responses, so total does not add up to 100%

Satisfaction with Cook Islands Services



Note: N = 502 - 941 for Jan – Mar 2020; N = 91 - 305 for Jan – Mar 2023. Due to rounding, some totals do not sum to 100%. * New variables from 2021

Most Appealing Aspects of the Cook Islands



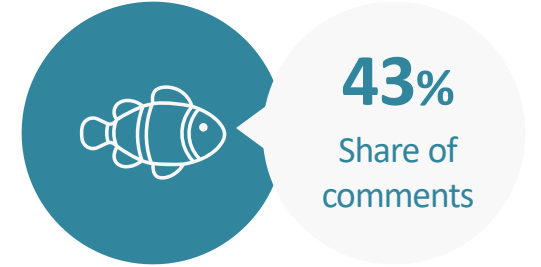
Note: Total responses for the question N=300. Multiple responses, so total does not add up to 100%

Most Appealing – Local People

- + Friendly people.
- + Friendliness of locals.
- + The friendliness of the locals and learning more about Kuki culture.
- + The people and the easy way of life. Very relaxing.
- + The people friendly and just beautiful.
- + It is a stunningly beautiful place. The people are gracious, friendly, but also dignified. We loved the island.
- + Absolutely love the people and culture with a passion. That is the main reason why we always come to Cook Islands.
- + The people in Rarotonga are so beautiful.



Most Appealing – Environment Cleanliness and Weather



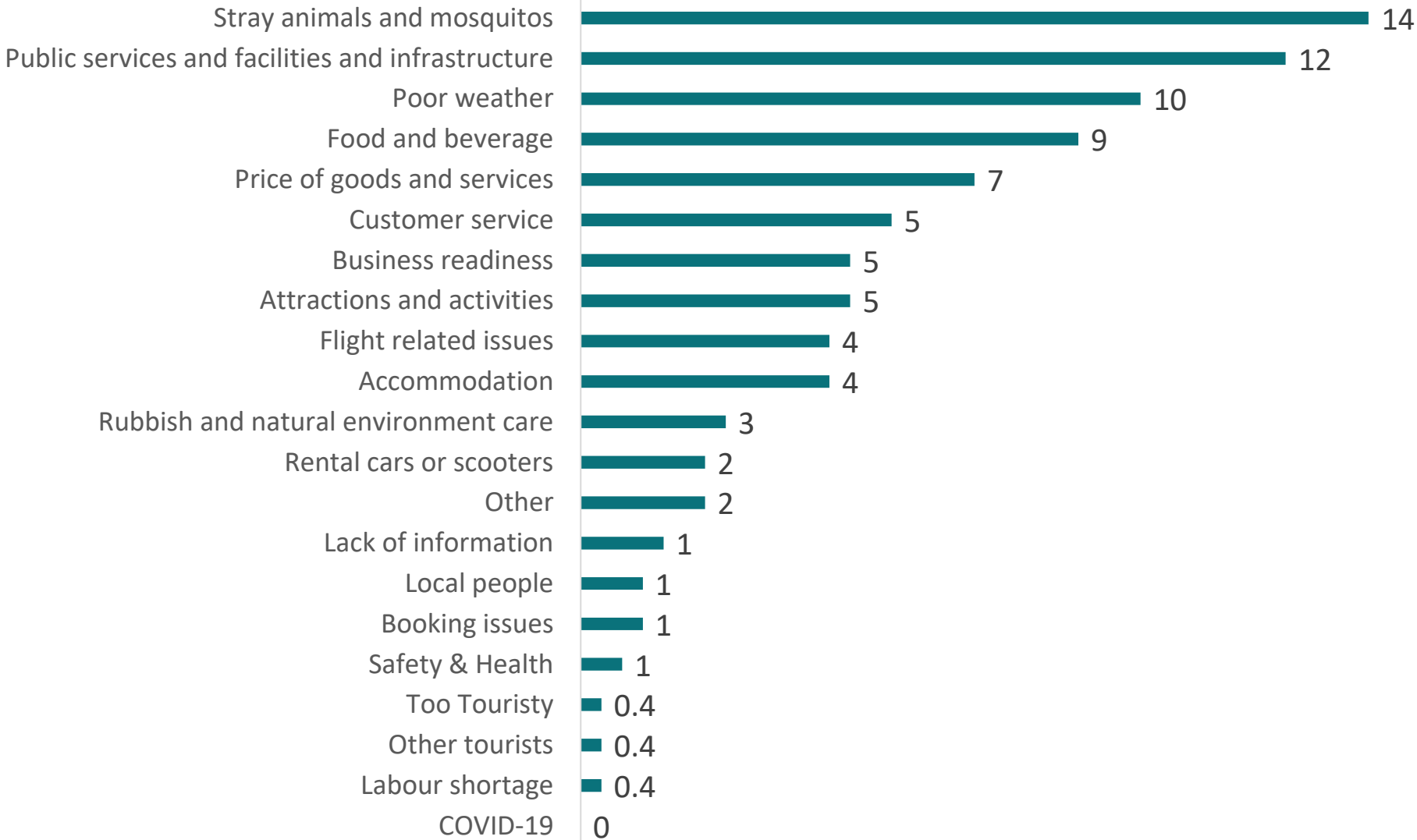
- + The unspoiled beauty, lack of over-tourism!
- + Beautiful beaches.
- + The natural beauty of the Islands especially Aitutaki.
- + Cleanliness of the lagoon.
- + Weather was nice and warm, with lots of opportunities to snorkel and swim.
- + Clear water, warm weather, relaxing environment, snorkelling, cocktails.
- + The ability to swim with the turtles.
- + Snorkelling outside our accommodation in Titikaveka, Rarotonga everyday, excellent beach and wildlife there! Snorkelling off a small charter in the Aitutaki Lagoon seeing giant clams and trevally.

Most Appealing – Activities, Attractions and Entertainment



- + Scuba diving and snorkelling.
- + Tumutoa Tours.
- + The international triathlon experience.
- + Turtle tour experience.
- + The snorkelling was fabulous.
- + Cook Island culture i.e., islands feasts and shows on offer, lagoon cruise, New Zealand currency.
- + Tama lagoon cruise. And the buggy tours would have been my best.
- + Koka Lagoon Tours - trip out to the lagoon.
- + The snorkelling, the pearl shopping, and the friendliness of everyone.

Least Appealing Aspects of the Cook Islands



Share of respondent comments (%)

Note: Total responses for the question N=280. Multiple responses, so total does not add up to 100%.

Least Appealing - Stray Animals and Mosquitos

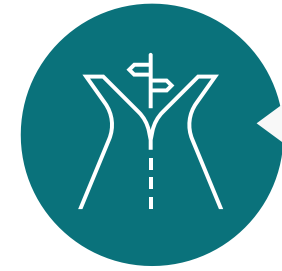


14%

Share of
comments

- + Mosquitos!
- + Noise level of roosters crowing all night long.
- + Propensity of roosters that crow all night long-resulted in limited sleep for all members of the group.
- + So many dogs, some with quite bad injuries.
- + The amount of wandering dogs they seemed worse than normal.
- + The howling and barking dogs all night outside our accommodation. When I say all night, I mean from midnight to sunrise. It was impossible to sleep.
- + Very sad to see so many sea cucumbers & starfish replacing the wonderful wildlife in some areas of Rarotonga. It seems to be happening more and more.

Least Appealing - Public Service and Infrastructure



12%

Share of
comments

- + Not as walkable as expected - The single main road felt hazardous for pedestrians (lack of lighting, sidewalk, wide shoulder or other separation from traffic) particularly at night. Not many walking routes at all.
- + The horrible unsafe road surface on the west side of Rarotonga.
- + No signage on signs for cross island walk.
- + Public Toilet signage. Not clear as to where they are.
- + Internet access via Wi-Fi was extremely slow wherever I went.
- + No aircon at the airport on arrival. The heat is like a smack in the face.
- + A smile at customs/immigration when arriving and leaving wouldn't hurt!

Least Appealing Aspects – Poor Weather



- + It rained nearly every day.
- + It rained a lot and not much to do when raining.
- + Humidity 100% Humidity.
- + The humidity at that time of year.
- + Time of year lots of wind which you cannot control.
- + The weather! Our fishing charter was cancelled.
- + For the first time in a while (I travel often) we had mixed weather.

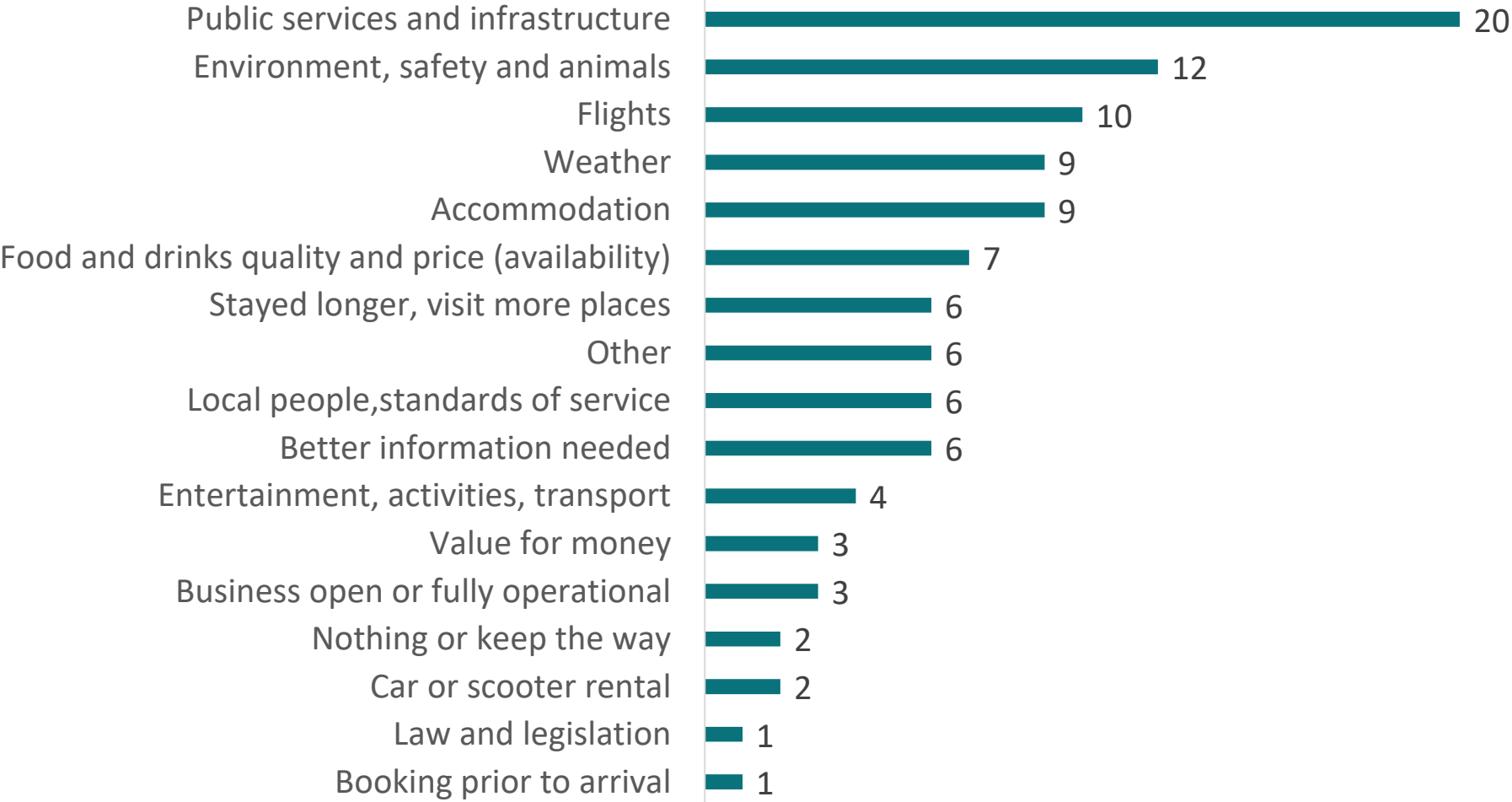
Least Appealing Aspects – Food and Beverage



9%
Share of
comments

- + I was disappointed at the small variety of fresh fruit and fresh seafood available.
- + The food options on Aitutaki were disappointing.
- + We were only offered tuna in every resort or cafe, in terms of fish. We didn't see any other locally sourced seafood.
- + Not enough gluten free options. Seems the CI could benefit from a gluten free bakery which makes bread, burger buns and pizza bases!
- + We were a bit disappointed with nearly all the restaurants we visited during our stay which we also know so very well and were well down on quality of food served compared to previous years.
- + Dining out, quality expected didn't match price of meals.

Suggestions for Improvement



Share of respondent comments (%)

Note: Total responses for the question N=100. Multiple responses, so total does not add up to 100%.

Suggestions for Improvement - Indicative Quotes

- + Better Wi-Fi and communication about how hard it would be to get Wi-Fi.
- + Extend the road upgrade around the island.
- + Have a dog control program in place.
- + Animal control (e.g., roosters crowing).
- + Better flights scheduling from Melbourne to Rarotonga.
- + A later flight leaving NZ.
- + More activities for when it was raining.
- + More local information available at the resorts, recommendations for activities.

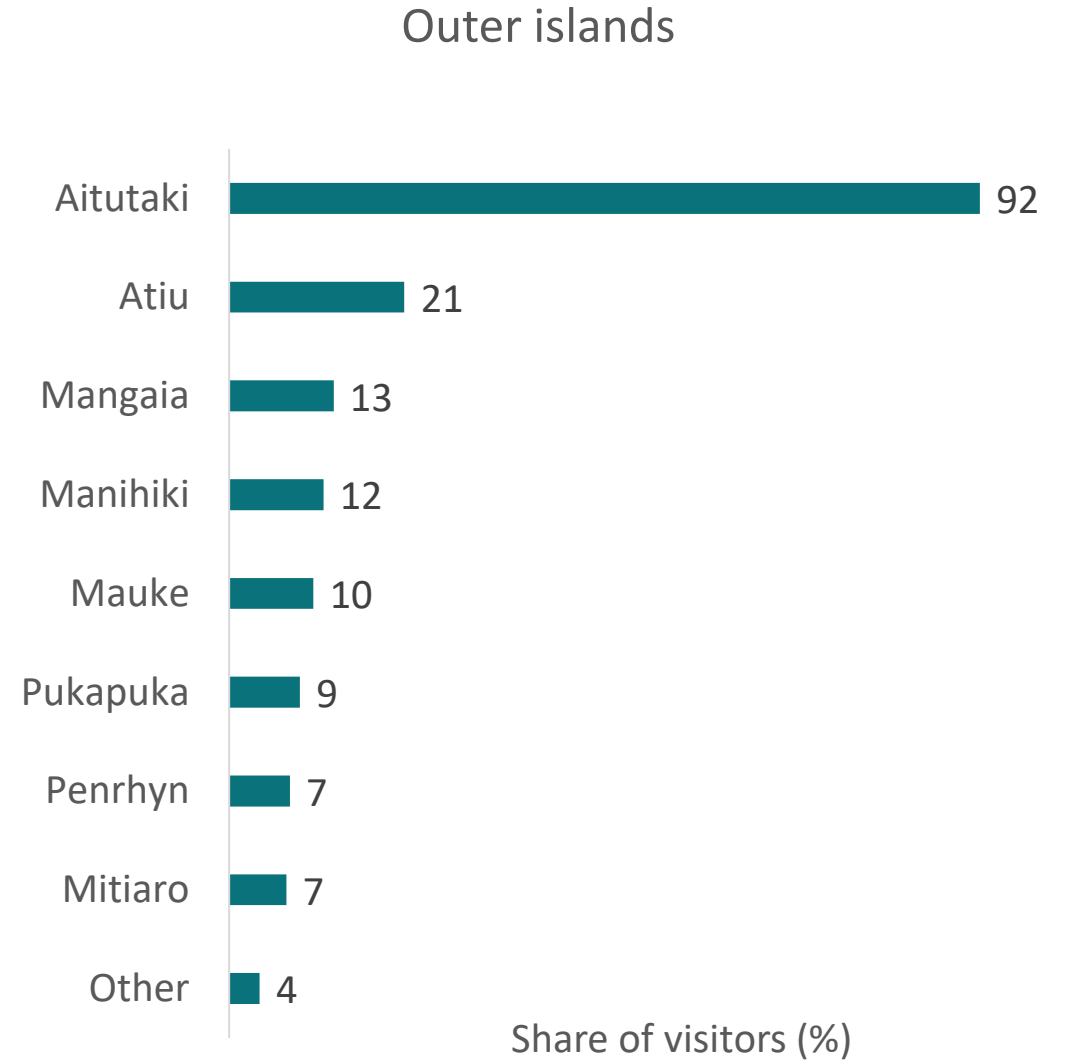
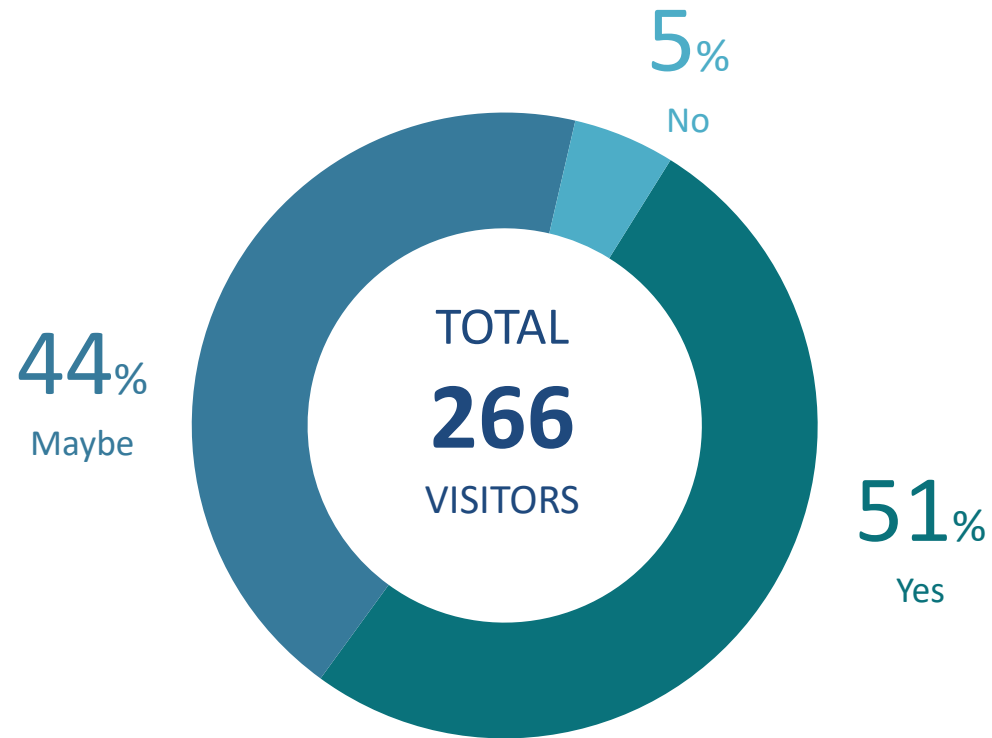
Willingness to Return



Reasons for Not Willing to Return -Indicative Quotes

- + We always like to go to places that are new to us.
- + I have seen all I want to see there .
- + Not really enough to do and good swimming beaches are privately controlled due to access.
- + Once in a lifetime experience because of the distance from the UK.
- + Only if flight costs reduce, otherwise we go to Fiji.
- + We enjoyed our trip, but would be unable to justify the costs.

Willingness to Visit Outer Islands



Note: N = 266. Multiple responses, therefore total does not add up to 100%

Willingness to Recommend

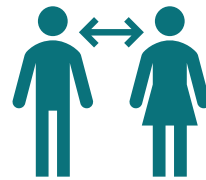


Reasons for Not Willing to Recommend - Indicative Quotes

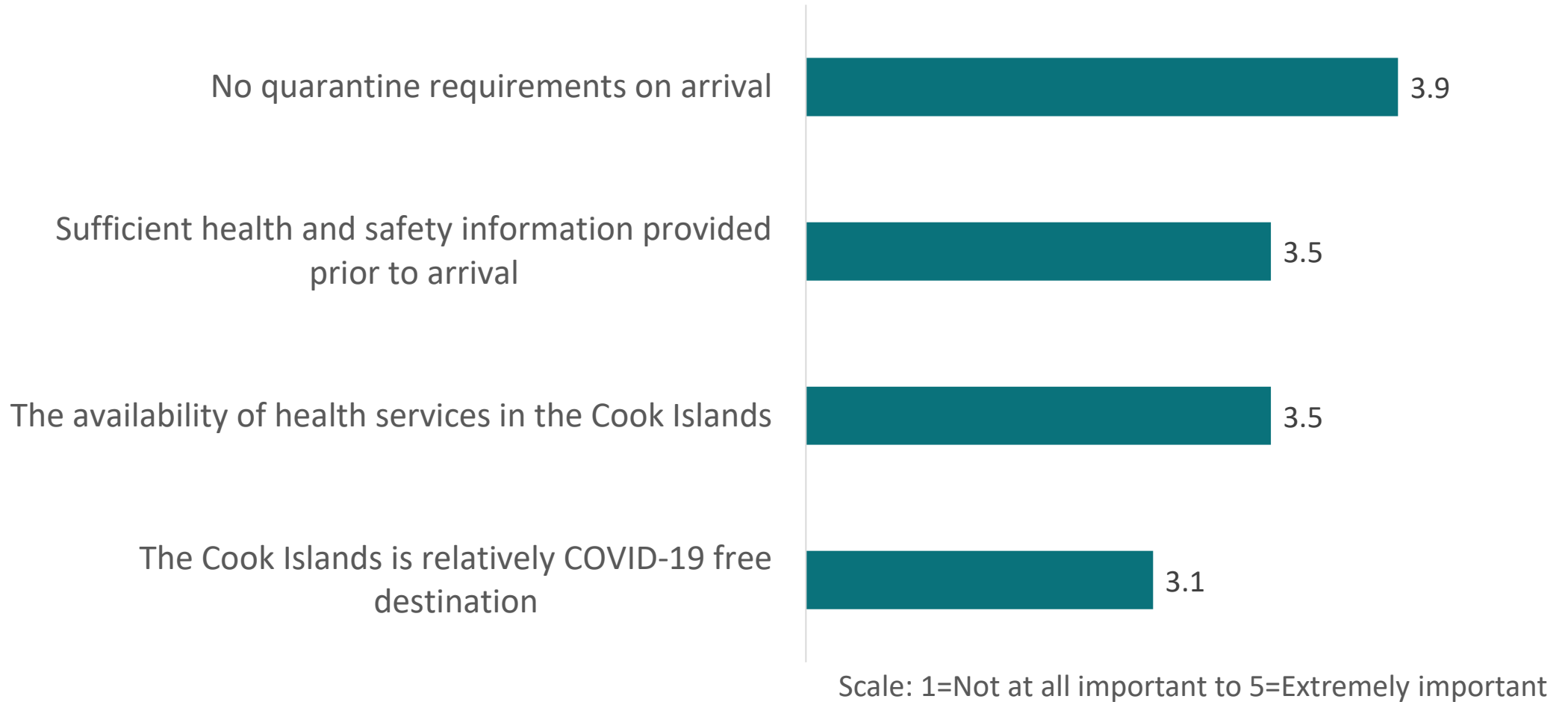
- + Too far and had to overnight in Auckland and Fiji is closer.
- + For price Fiji is better value.
- + It was very expensive for what we got.
- + Unless they want to blob out, better cultural places to visit, better food options.

2023 JAN-MAR VISITORS

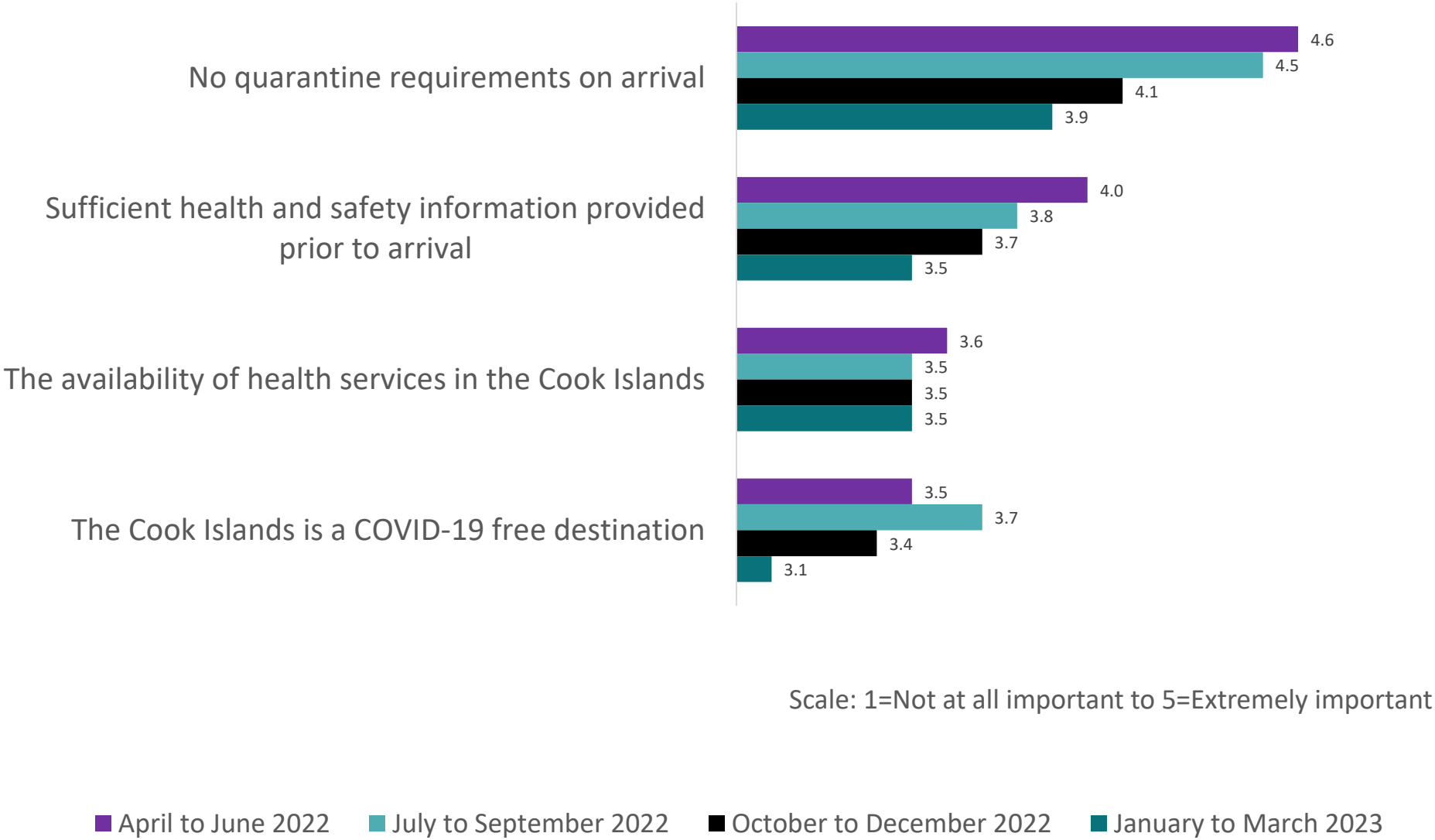
COVID RESPONSES



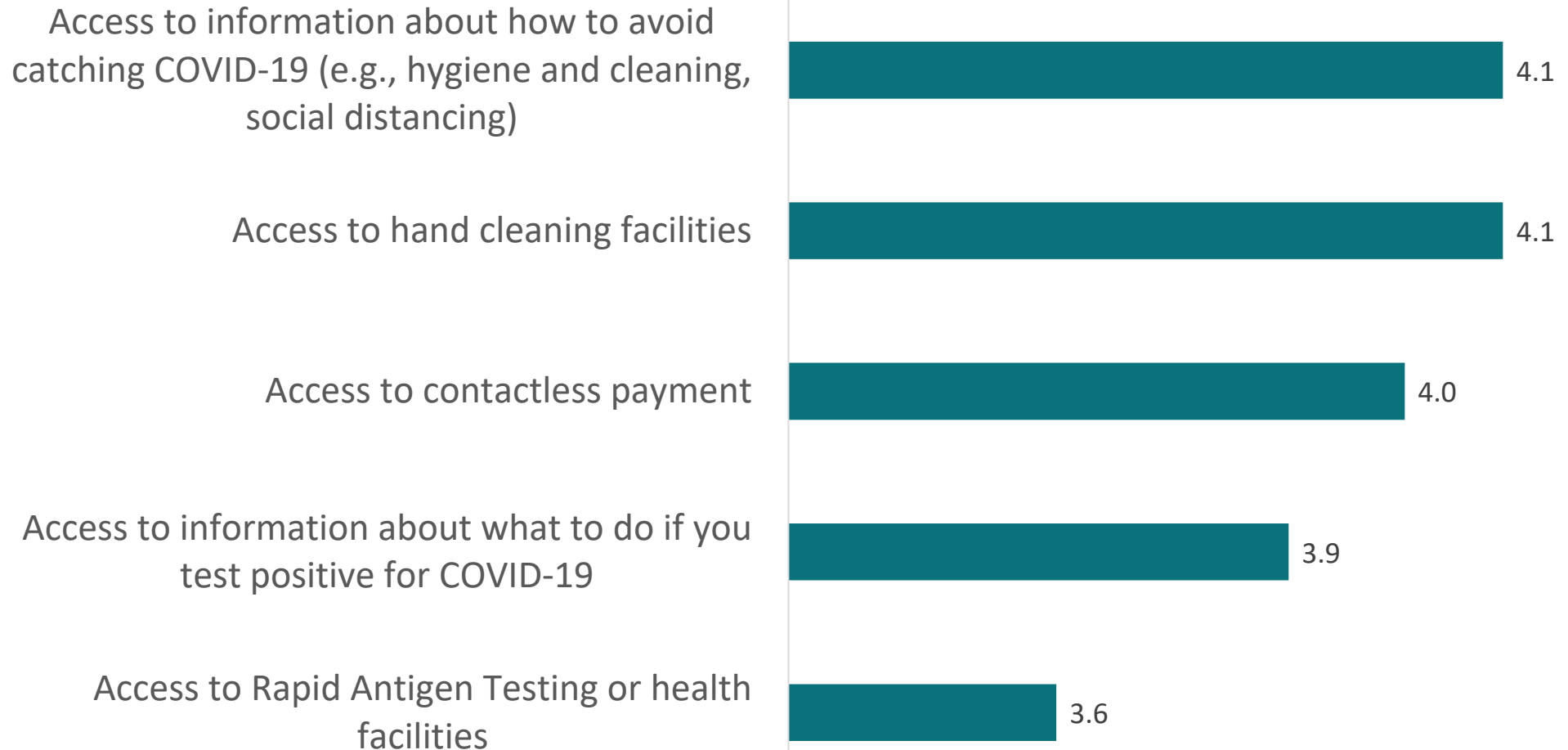
The important factors in your decision to travel to the Cook Islands



The important factors in your decision to travel to the Cook Islands – Time series

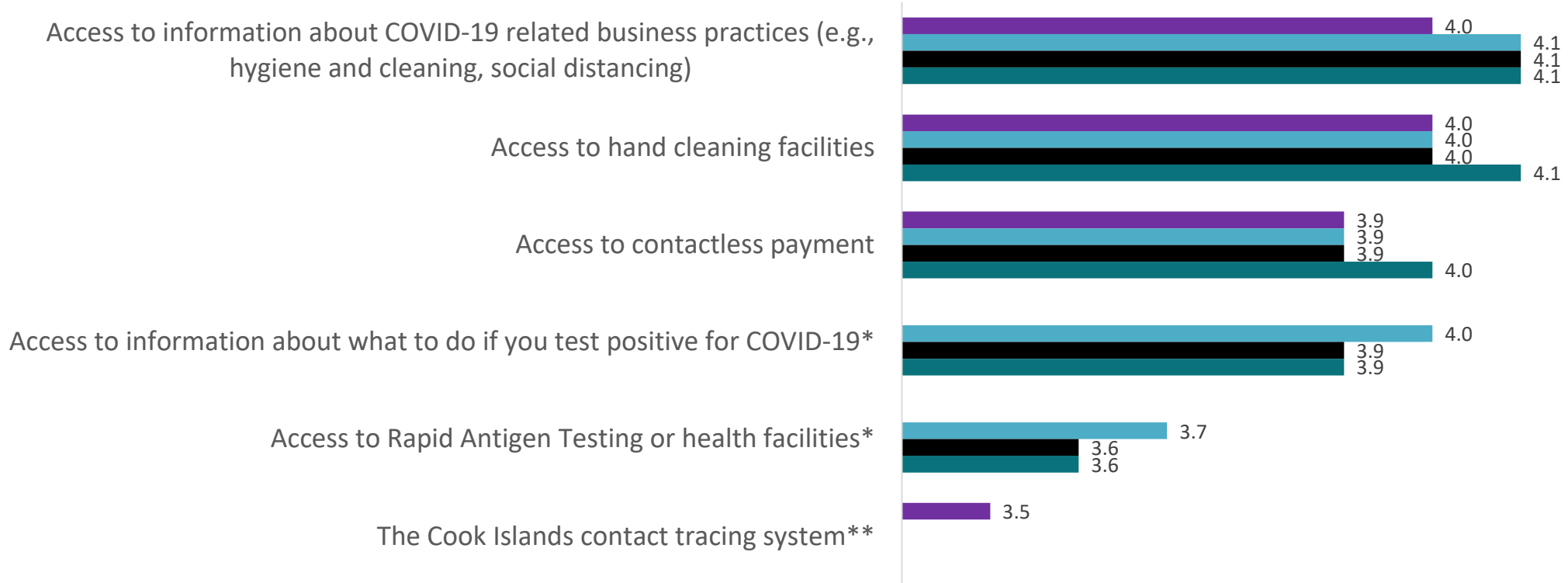


Satisfaction with COVID responses



Scale: 1=Very dissatisfied to 5=Very satisfied

Satisfaction with COVID responses –Time series

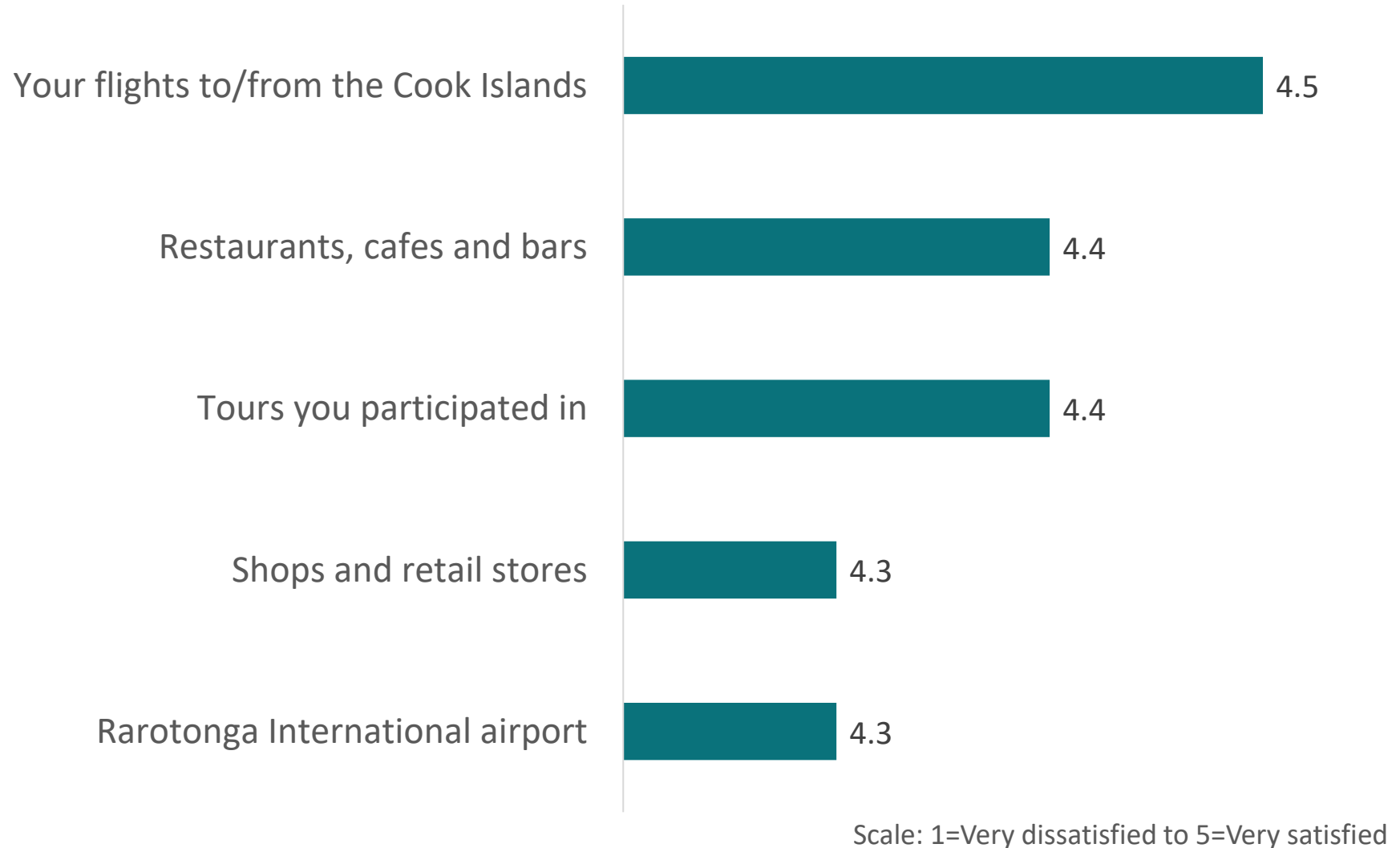


Scale: 1=Very dissatisfied to 5=Very satisfied

■ April to June 2022
 ■ July to September 2022
 ■ October to December 2022
 ■ January to March 2023

Note: * New variables from July to September 2022; ** Removed variables from July to September 2022

Satisfaction with health and safety measures



Satisfaction with health and safety measures –Time series



Scale: 1=Very dissatisfied to 5=Very satisfied

■ April to June 2022 ■ July to September 2022 ■ October to December 2022 ■ January to March 2023

Further Comments on COVID-19



Further Comments on COVID - Indicative Quotes

77%
NO CONCERNS



- + No longer a worry.
- + We were not concerned about COVID 19 while being on the island. We felt safe.
- + COVID-19 was not an issue.
- + Didn't think about it much at all.
- + Pleasing to see no masks and felt covid was under control.
- + We believe the Cook Islands were doing the best you could to help keep Covid out of the country. There was a high availability of sanitising stations around and we appreciate this.

5%
CONCERNS OF
PROTOCOLS



- + Masks not required on planes, very few wore one. Same with local restaurants. Pretty much wide open as if Covid was no longer an issue.
- + There didn't appear to be any requirements to keep yourself or others safe...
- + Felt very sorry for the locals who were catching COVID from visitors.

Thank you

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