

THE COOK ISLANDS

INTERNATIONAL VISITOR SURVEY

ANNUAL REPORT

July 2022 – June 2023

Prepared for Cook Islands Tourism Corporation



NEW ZEALAND
FOREIGN AFFAIRS & TRADE
MANATŪ AORERE

AUT

Key Notes

- IVS data from July 2022 to June 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 July 2019 to March 2020 IVS data and the July 2022 to June 2023 IVS data.
- Key results include visitor profile and characteristics, decision-making, spending and satisfaction.
- All reports from the IVS are available at the [Pacific Tourism Data Initiative Resource Page](#)

SUMMARY OF KEY FINDINGS 2019 vs. 2023

Jul 2019-Mar 2020



COUNTRY OF ORIGIN



7%
Visitors are 70 years old or over.



4 ppl
Avg. number of travel companions.



58%
Visitors visited for the first time.



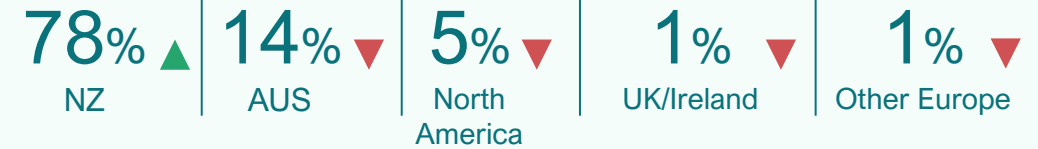
\$136,536
Average household income.

Note: NZ dollars.

Jul 2022-Jun 2023



COUNTRY OF ORIGIN



13% ▲
Visitors are 70 years old or over.



4 ppl
Avg. number of travel companions.



46% ▼
Visitors visited for the first time.



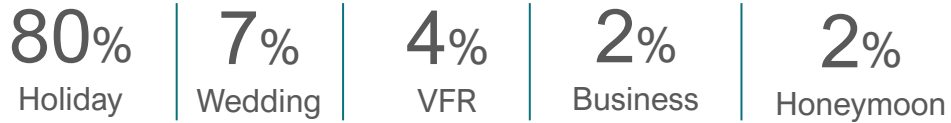
\$150,973 ▲
Average household income.

SUMMARY OF KEY FINDINGS 2019 vs. 2023

Jul 2019-Mar 2020



PURPOSE OF VISIT



4.5/5

Overall, visitors are very satisfied.



97%

Visitors are willing to recommend.



93%

Visitors are willing to return.

Jul 2022-Jun 2023



PURPOSE OF VISIT



4.7/5 ▲

Overall, visitors are very satisfied.



98% ▲

Visitors are willing to recommend.



94% ▲

Visitors are willing to return.

SUMMARY OF KEY FINDINGS 2019 vs. 2023

Jul 2019-Mar 2020

 PREPAID EXPENDITURE

\$2,049

Prepaid per trip

 IN-COUNTRY SPEND

\$154

In-country spend per day

40%

Flowing into local economy rate



X **8.5** nights
Average length of stay

\$820

Prepaid per trip

\$1,316

In-country spend per trip

 ECONOMIC IMPACT

\$2,136 per trip

\$250 per day

Jul 2022-Jun 2023

 PREPAID EXPENDITURE

\$2,476 ▲

Prepaid per trip

 IN-COUNTRY SPEND

\$204 ▲

In-country spend per day

40%

Flowing into local economy rate



X **8.9** nights ▲
Average length of stay

\$989 ▲

Prepaid per trip

\$1,814 ▲

In-country spend per trip

 ECONOMIC IMPACT

\$2,803 per trip ▲

\$315 per day ▲

Respondents (Jul 2022 - Jun 2023)

Total number of e-mail invitations sent:
9,870



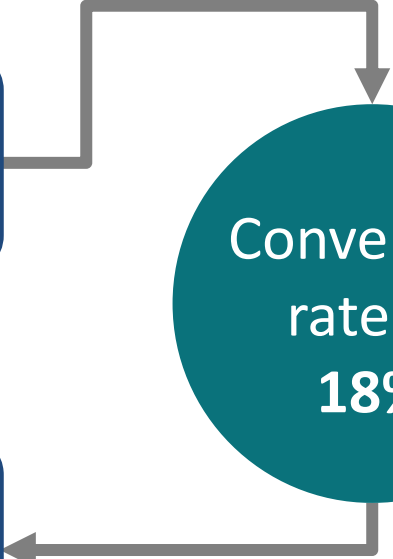
Total number of responses: **1,833**



Responses cover a total of
3,686 adults and **426** children



Conversion
rate of
18%



Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

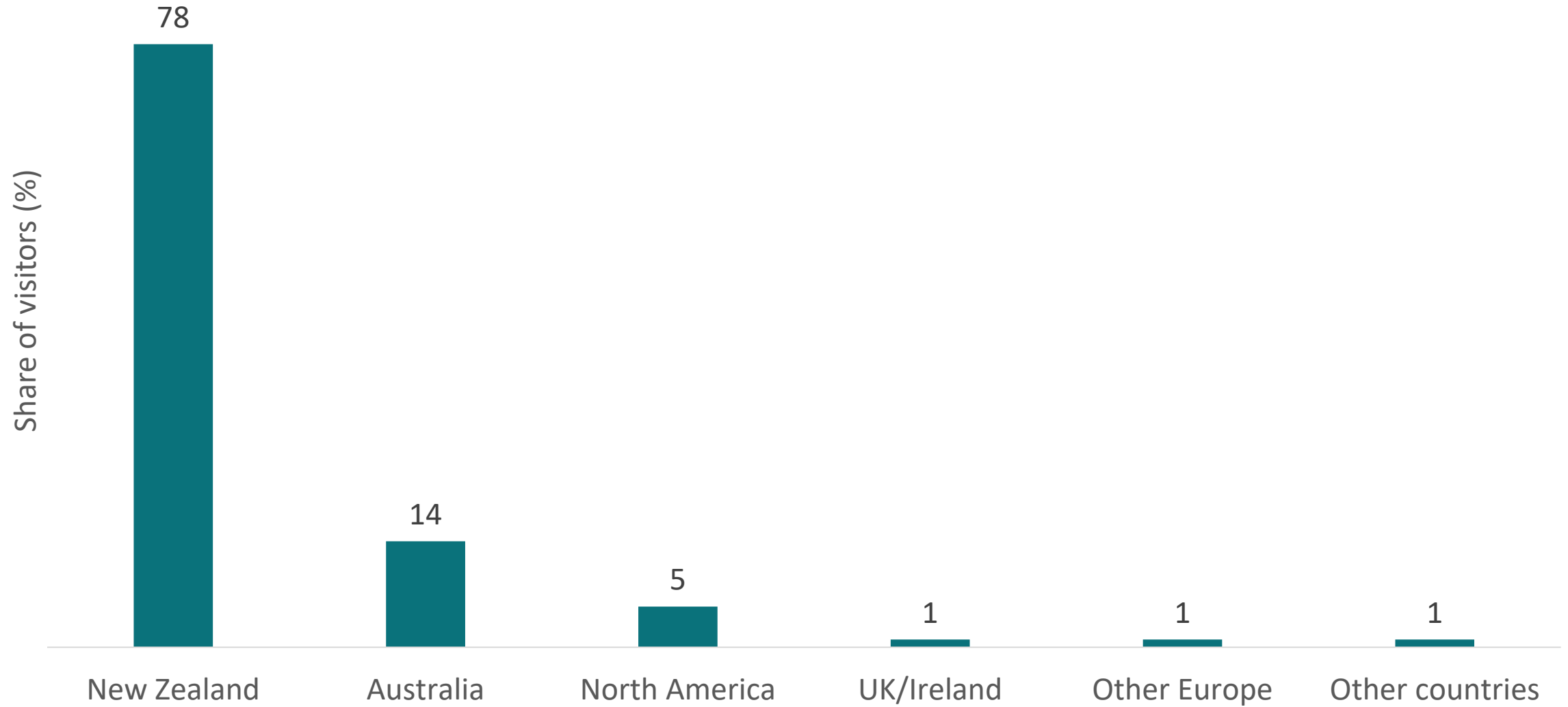


Visitor Spending
& Impact



Visitor
Satisfaction

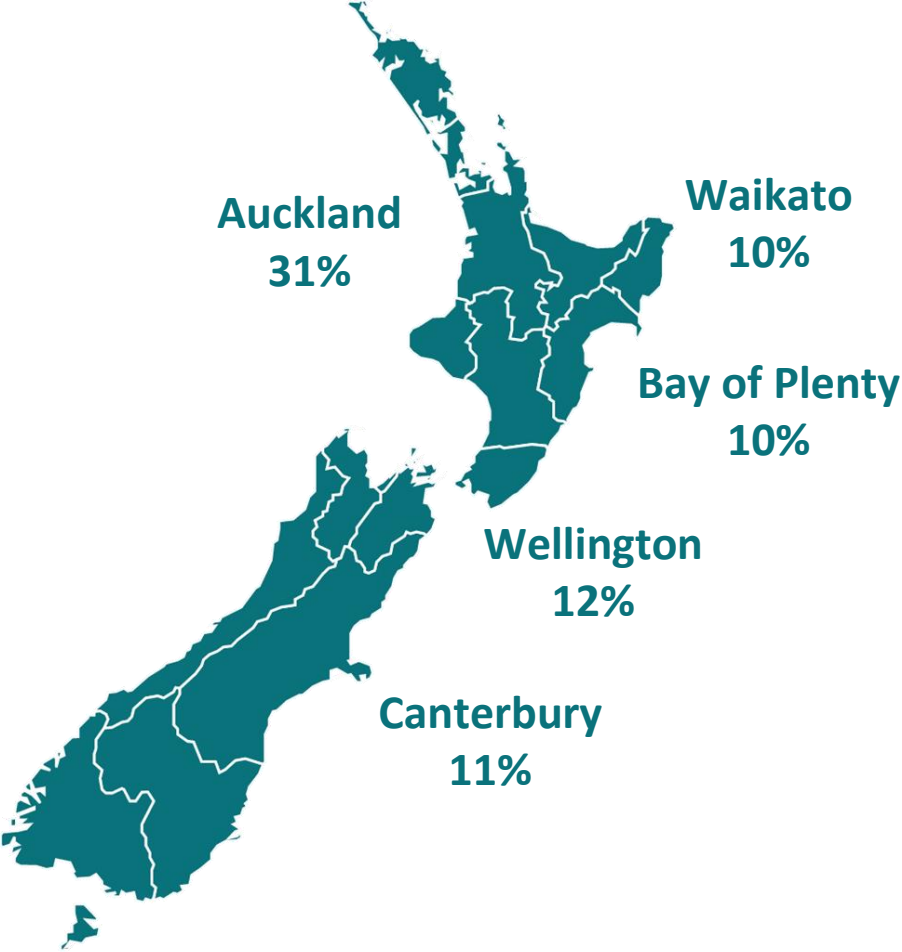
Country of Origin



Note: n = 1599. Due to rounding, some totals do not sum to 100%.

New Zealand Respondents - IVS Respondent Data

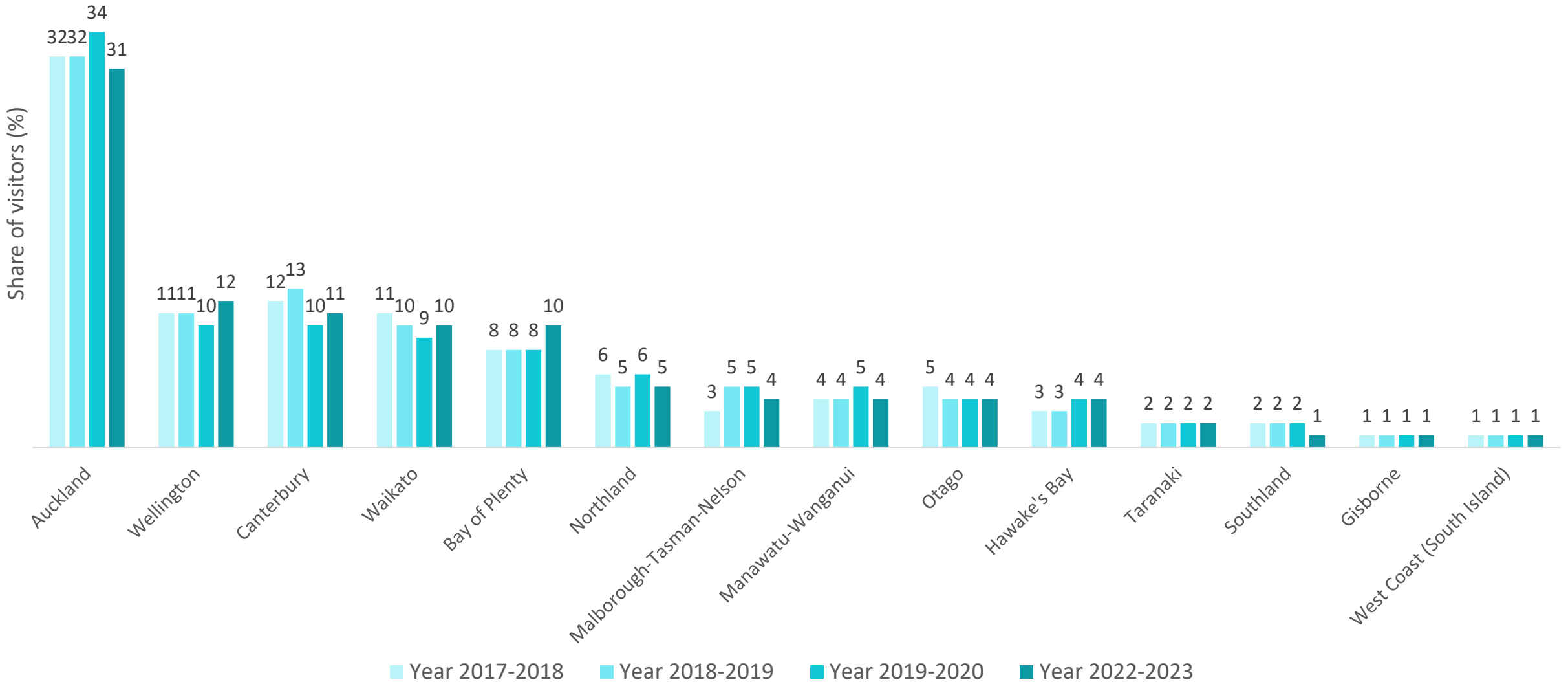
TOTAL
1,277
VISITORS



Auckland, Wellington, Canterbury, Waikato and Bay of Plenty, make up **74%** of all New Zealand visitor arrivals

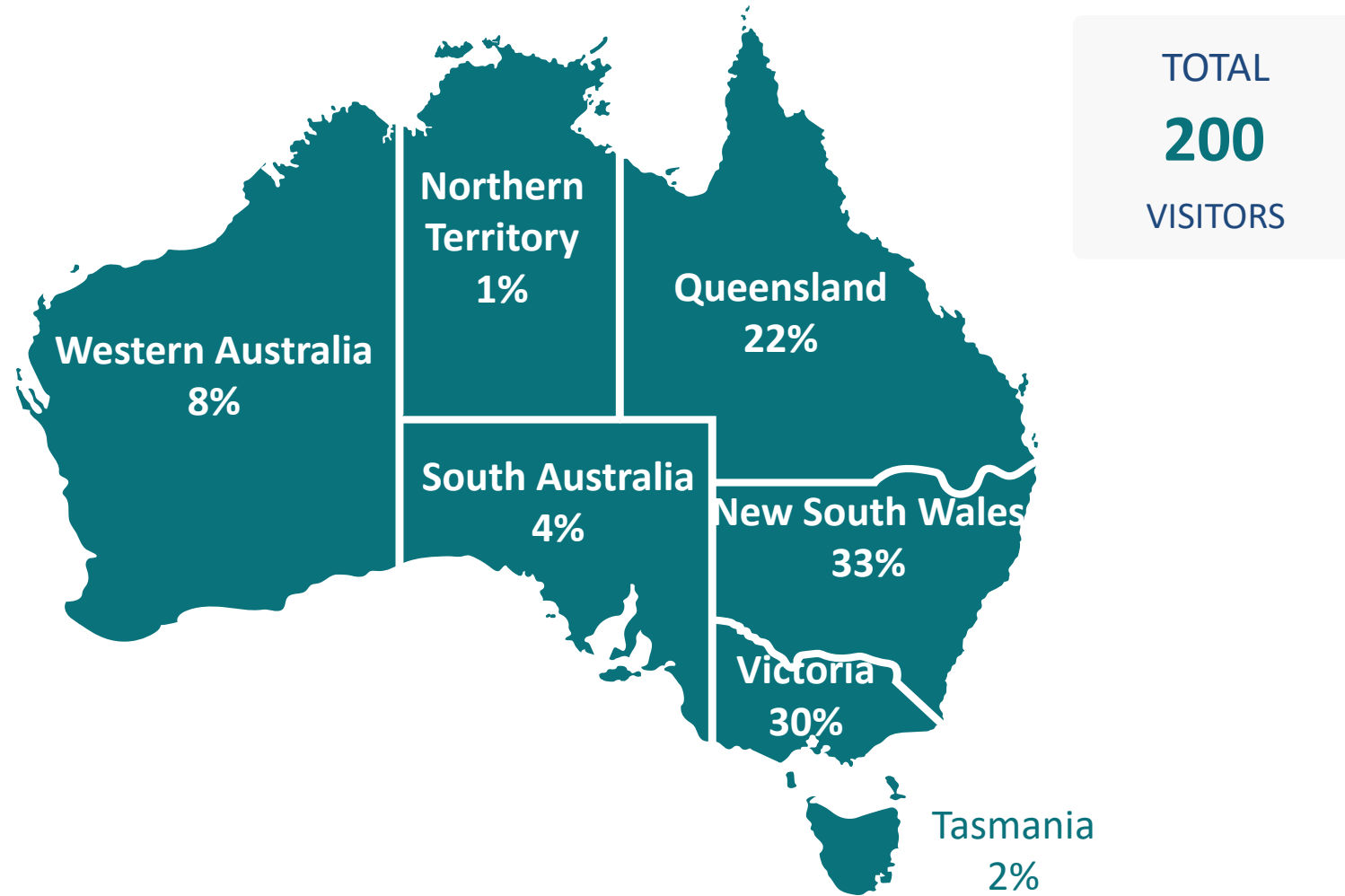
Note: Due to rounding, total does not sum to 100%

New Zealand Respondents - Yearly Breakdown



Note: Due to rounding, total does not sum to 100%

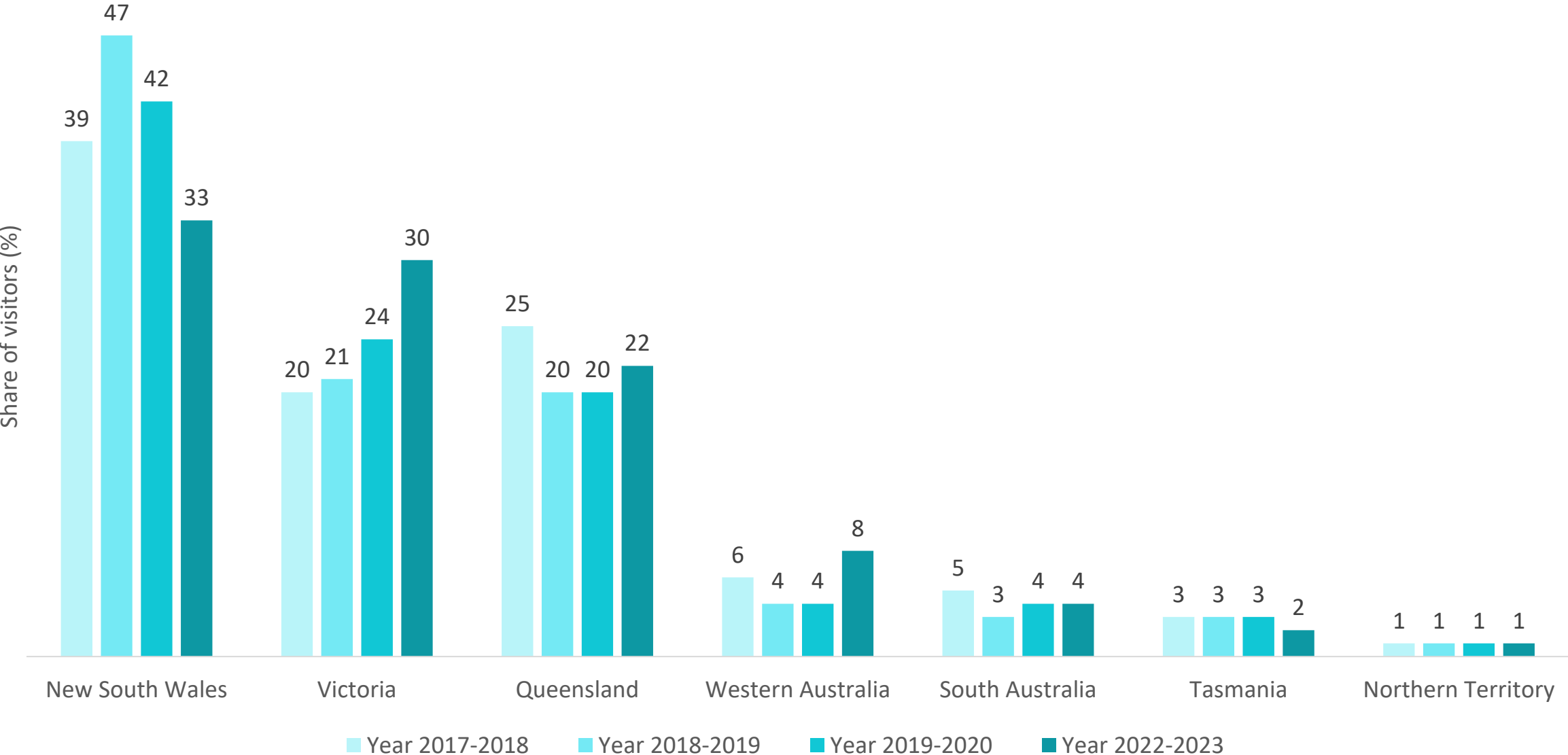
Australian Respondents - IVS Respondent Data



New South Wales, Victoria and Queensland make up **85%** of all Australian visitor arrivals

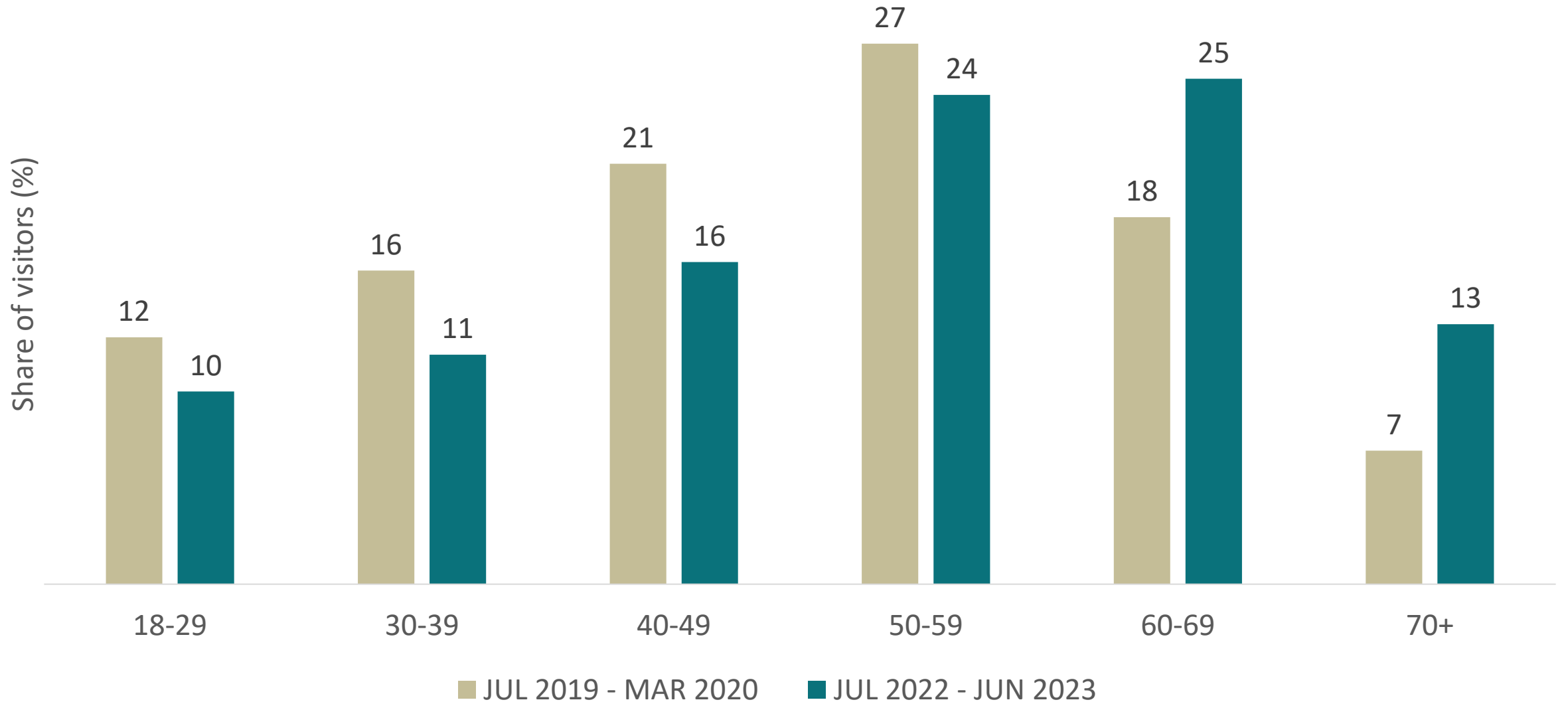
Note: Due to rounding, total does not sum to 100%

Australian Respondents - Yearly Breakdown



Note: Due to rounding, total does not sum to 100%

Age



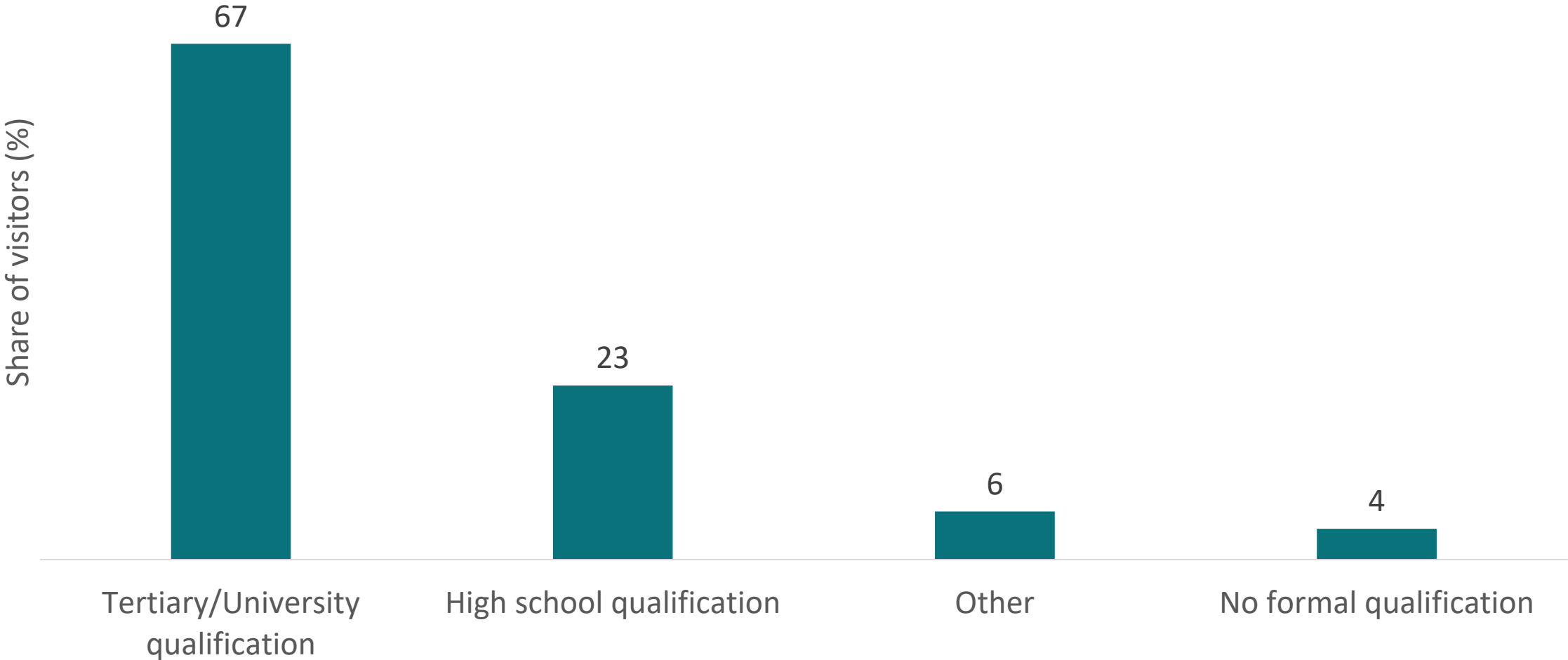
Note: Due to rounding, total does not sum to 100%

Gender



Note: Due to rounding, total does not sum to 100%

Education



Note: Due to rounding, total does not sum to 100%

Annual Household Income

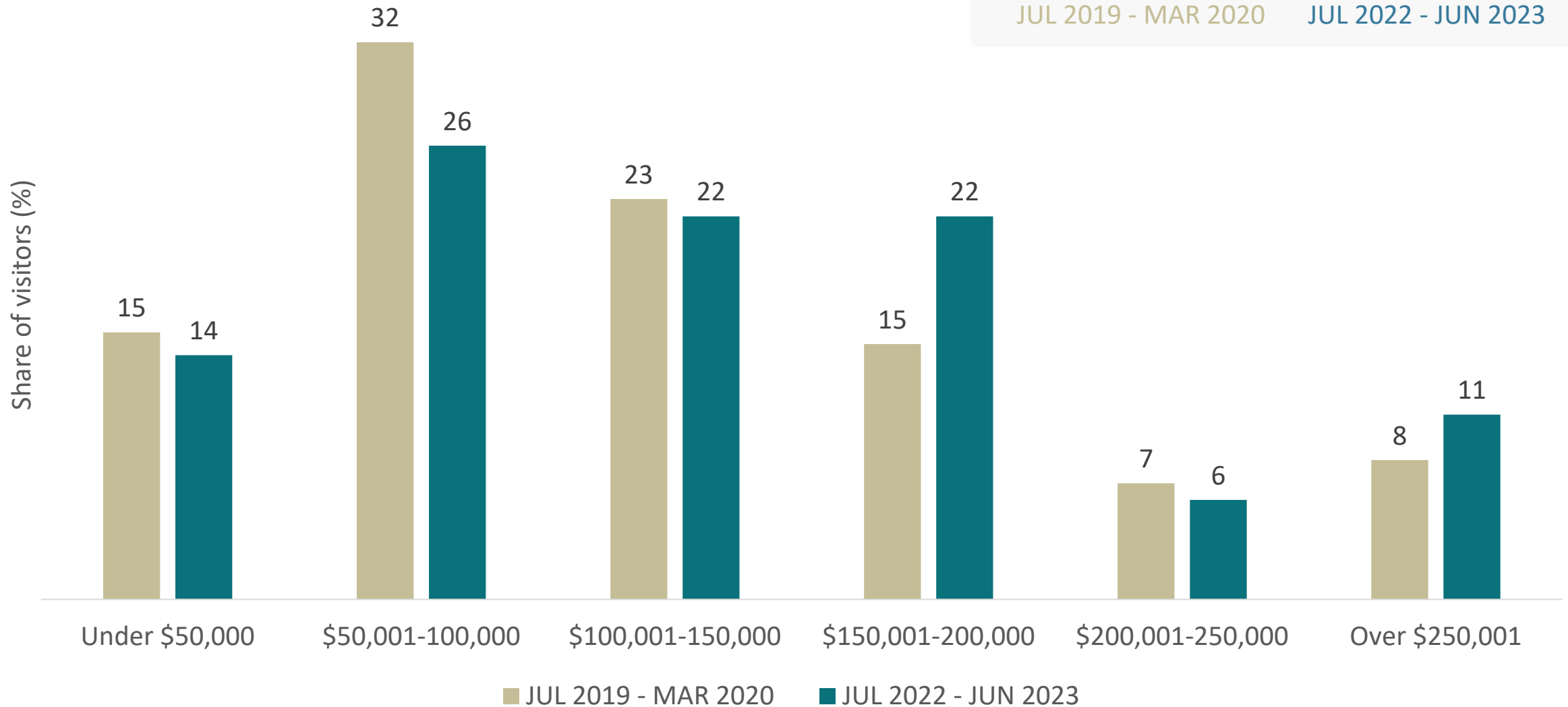
Avg. Household Income

136,536

JUL 2019 - MAR 2020

150,973

JUL 2022 - JUN 2023



Note: Due to rounding, total does not sum to 100%

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

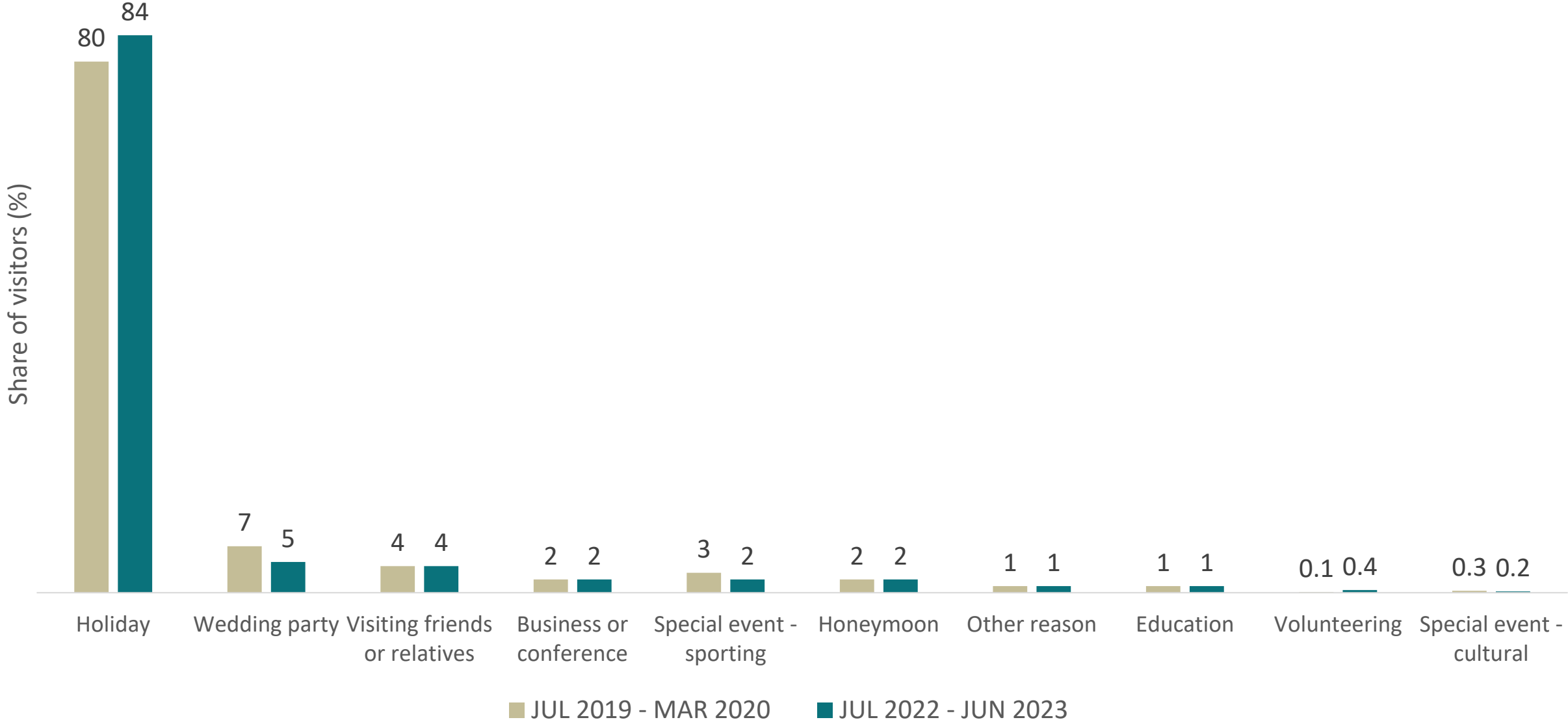


Visitor Spending
& Impact



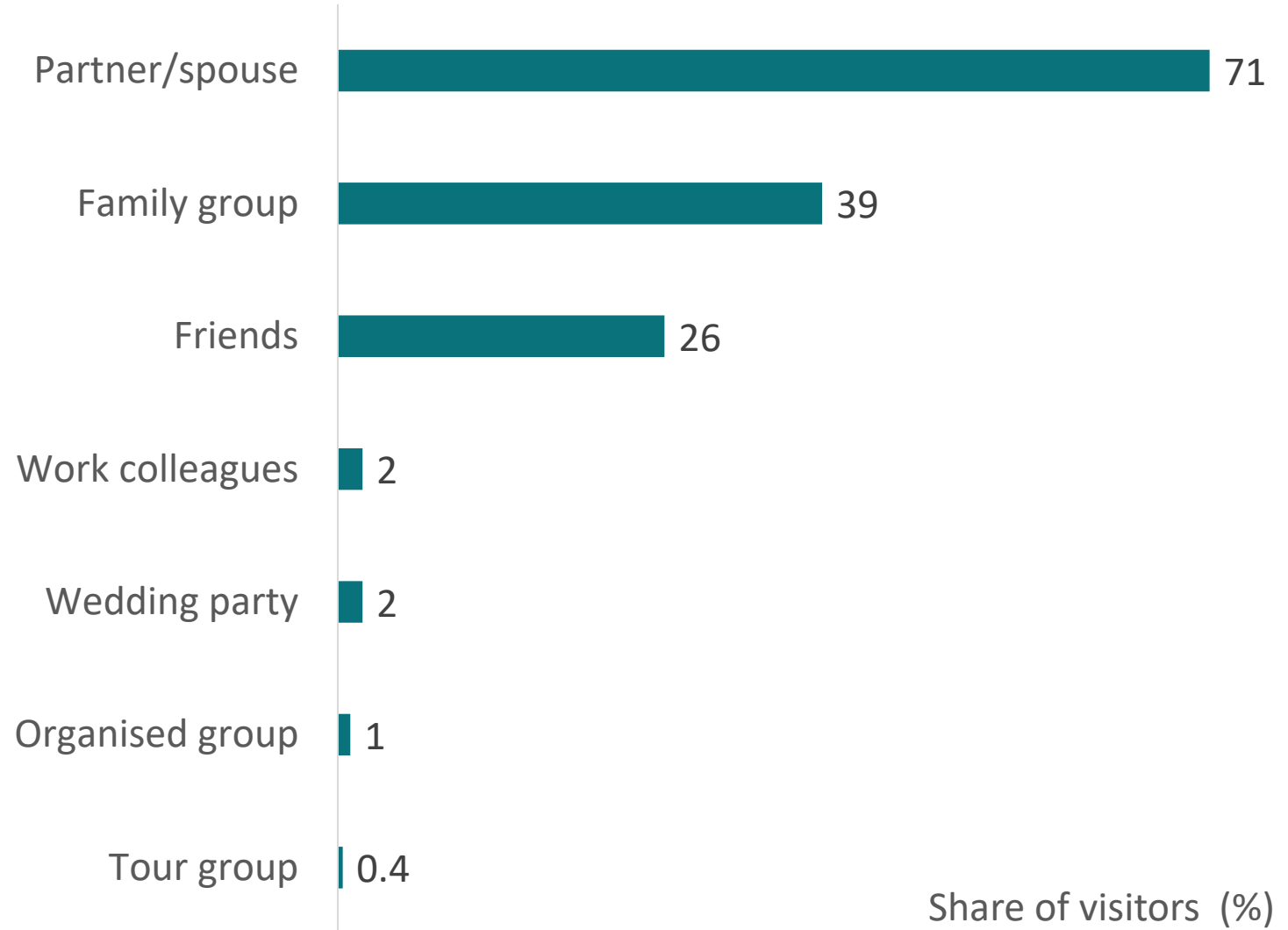
Visitor
Satisfaction

Purpose of Visit



Note: Due to rounding, total does not sum to 100%

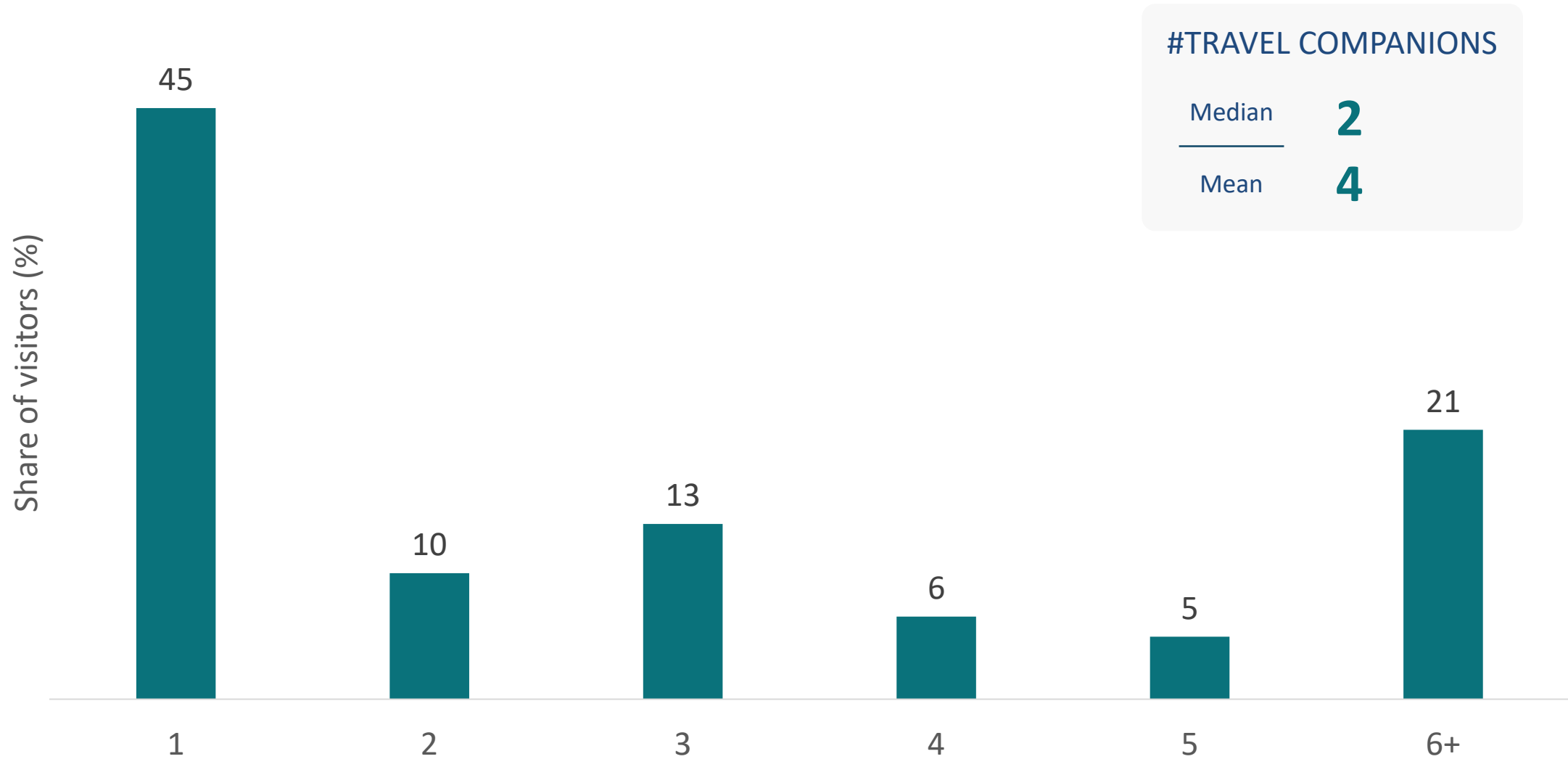
Travel Companions



Share of visitors (%)

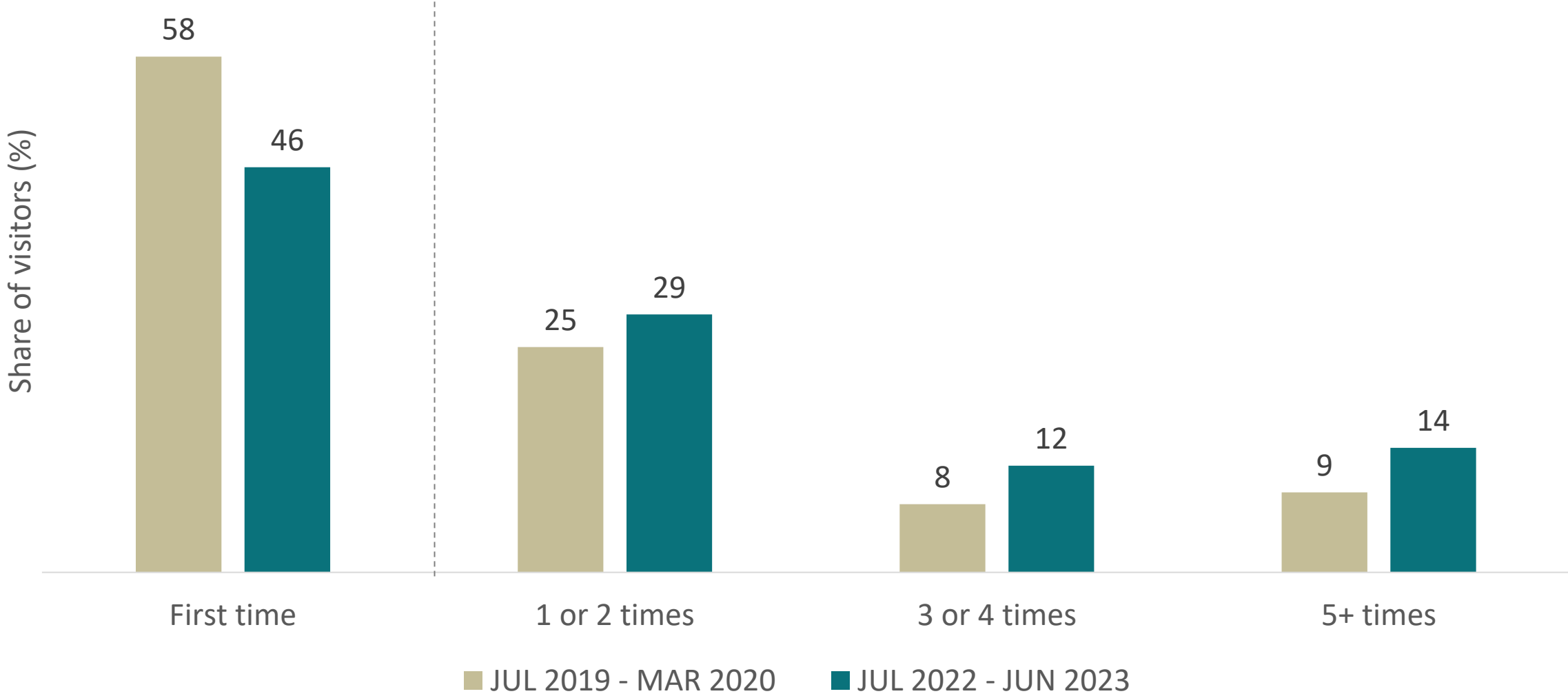
Note: Multiple responses, therefore total does not add up to 100%

Number of Travel Companions



Note: N = 1,497 (excluding those travelling alone N = 148). Due to rounding, total does not sum to 100%

Previous Visits



Note: Due to rounding, total does not sum to 100%

Length of Stay (nights)

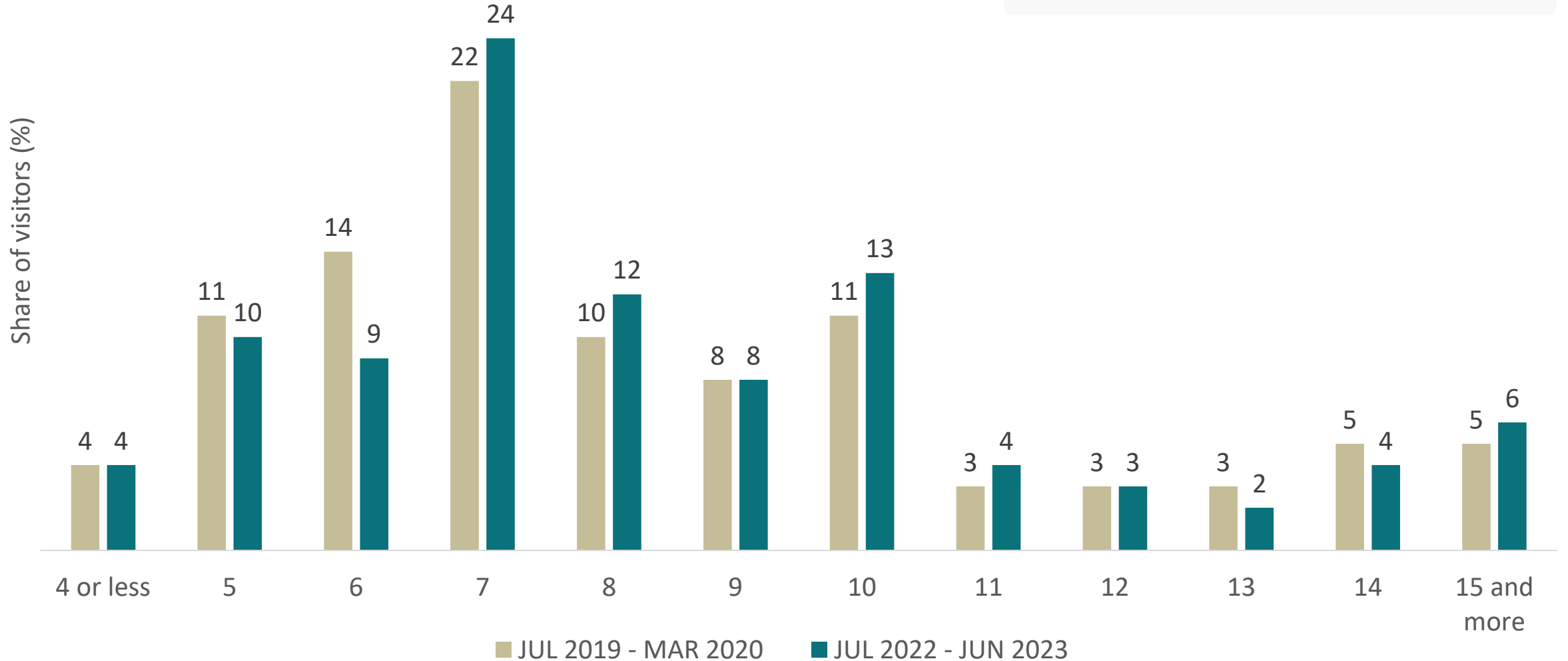
Avg. Length of Stay (nights)

8.5

8.9

JUL 2019 - MAR 2020

JUL 2022 - JUN 2023



Note: 31 and 31+ days as outliers were removed for length of stay analysis.

Airlines Used for Travel

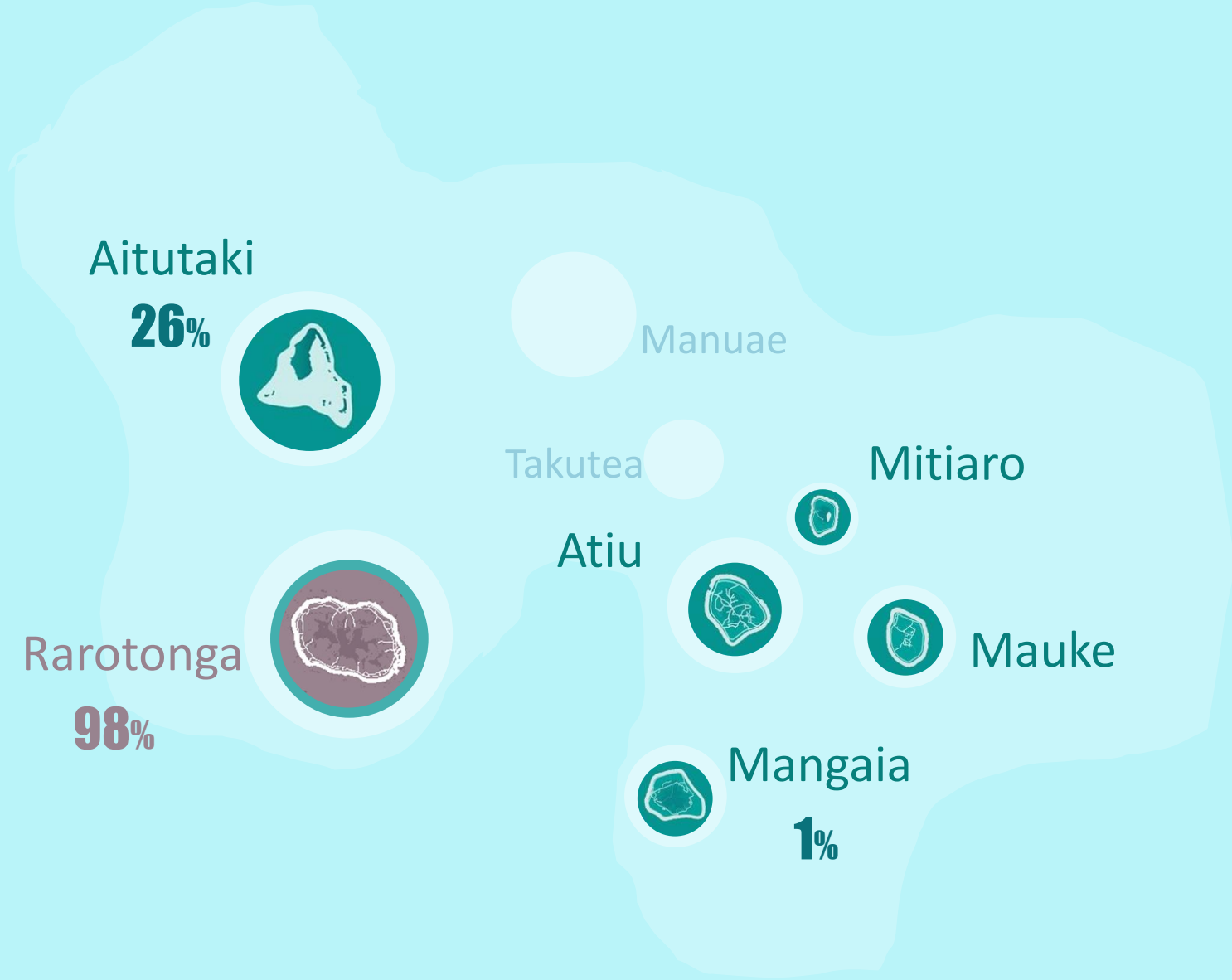


Other



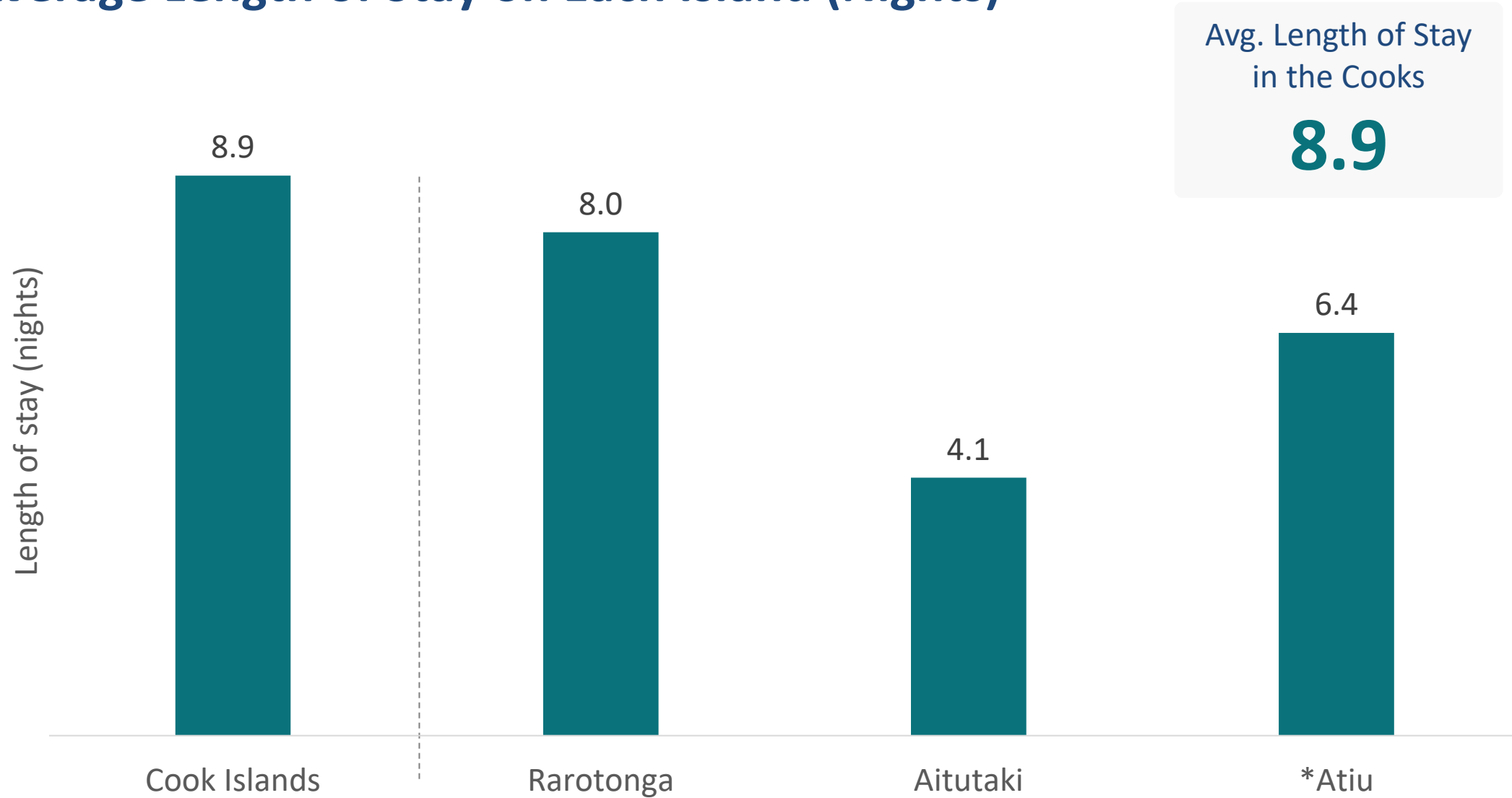
Islands Visited

1,827
TOTAL VISITORS



Note: Multiple responses, therefore total does not add up to 100%

Average Length of Stay on Each Island (Nights)



Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

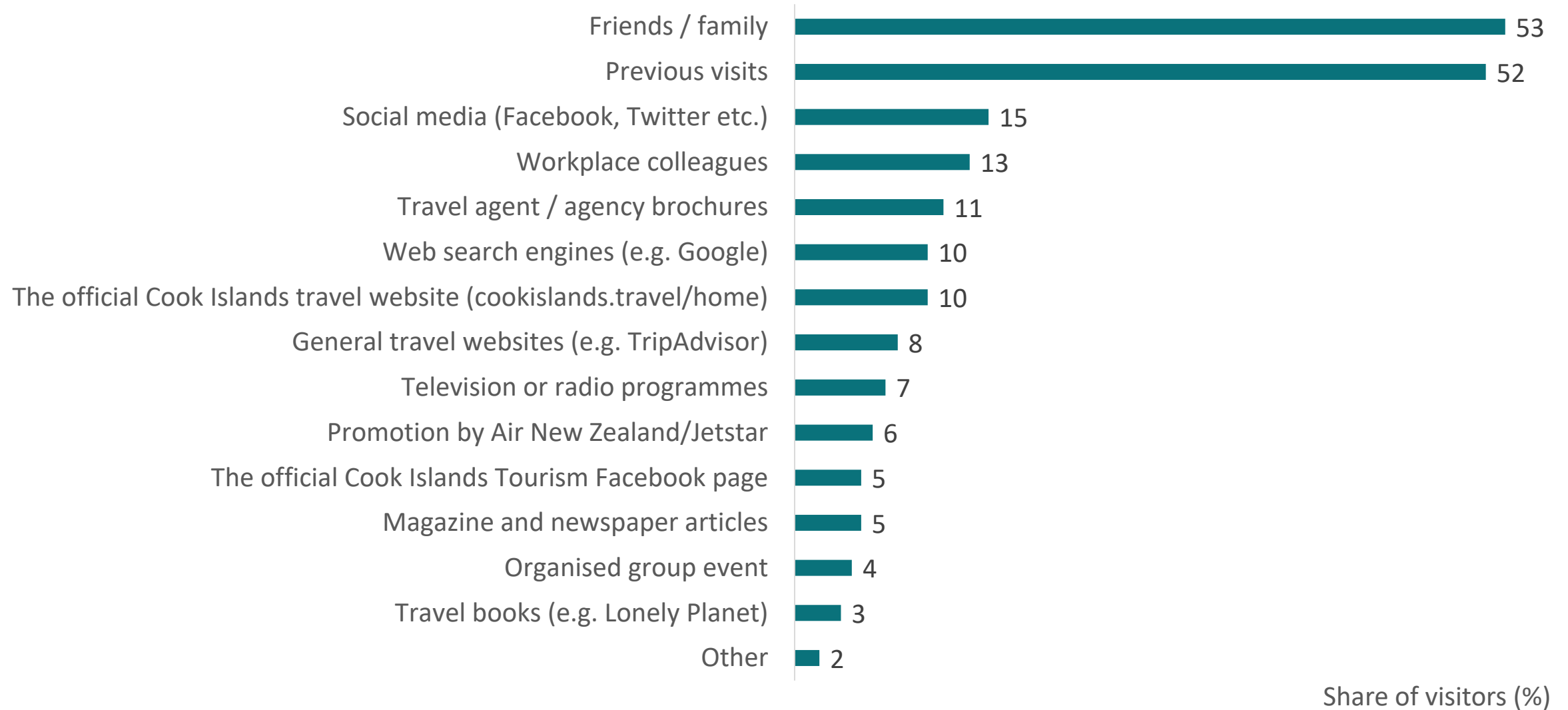


Visitor Spending
& Impact



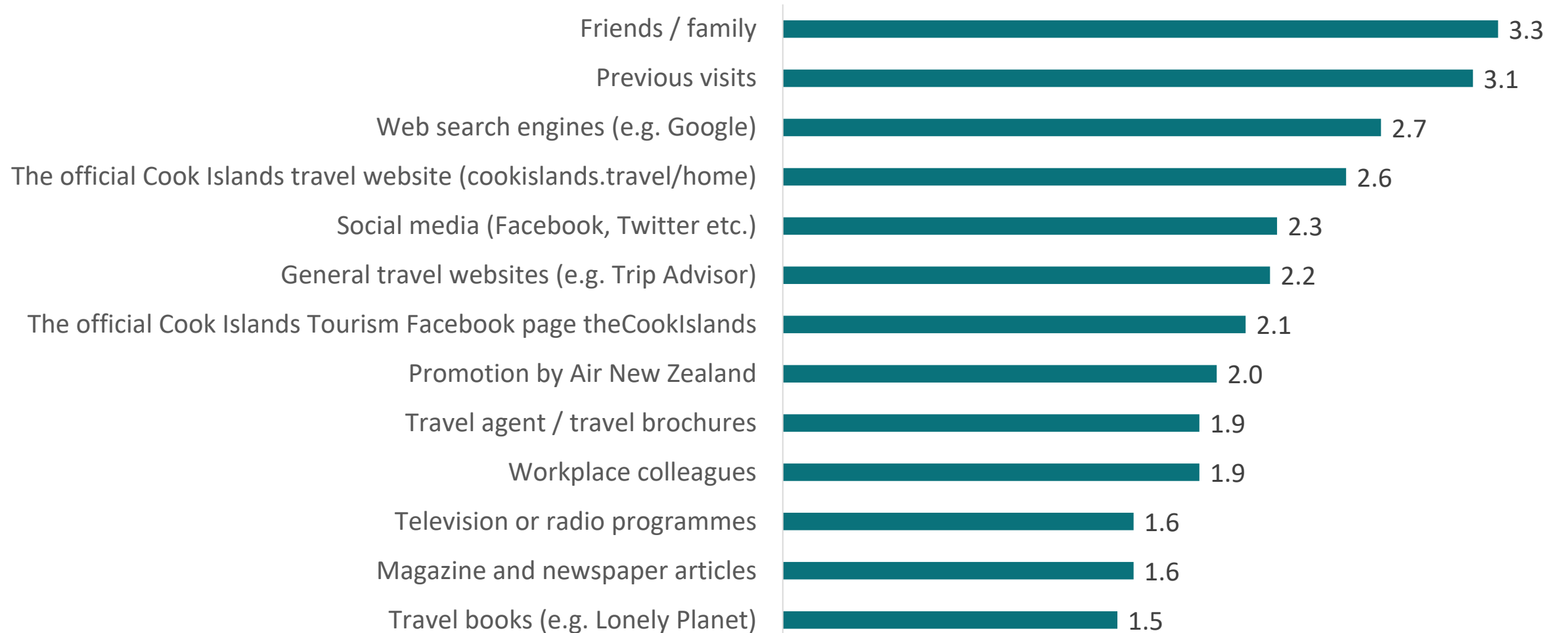
Visitor
Satisfaction

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



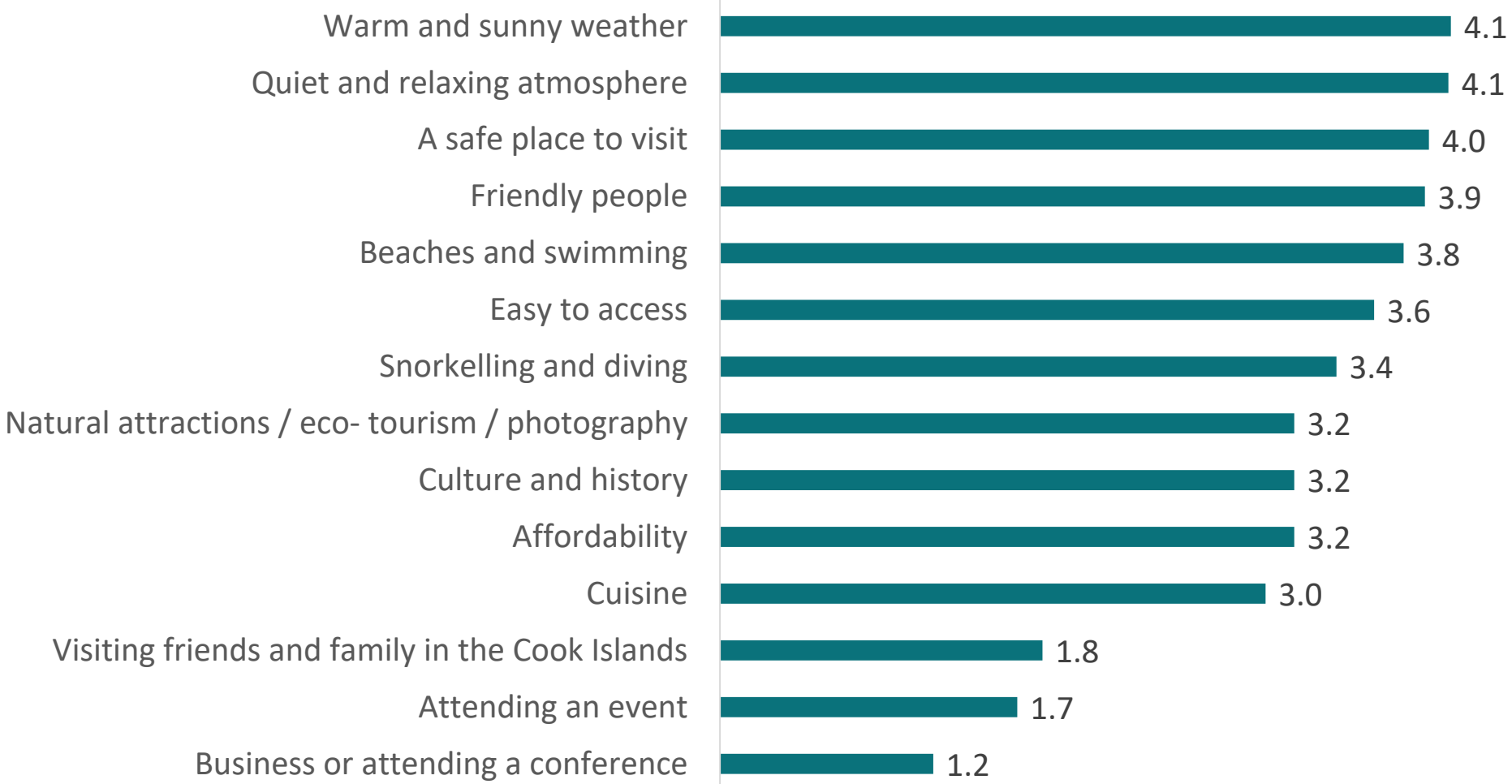
Note: Multiple responses, therefore total does not add up to 100%

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



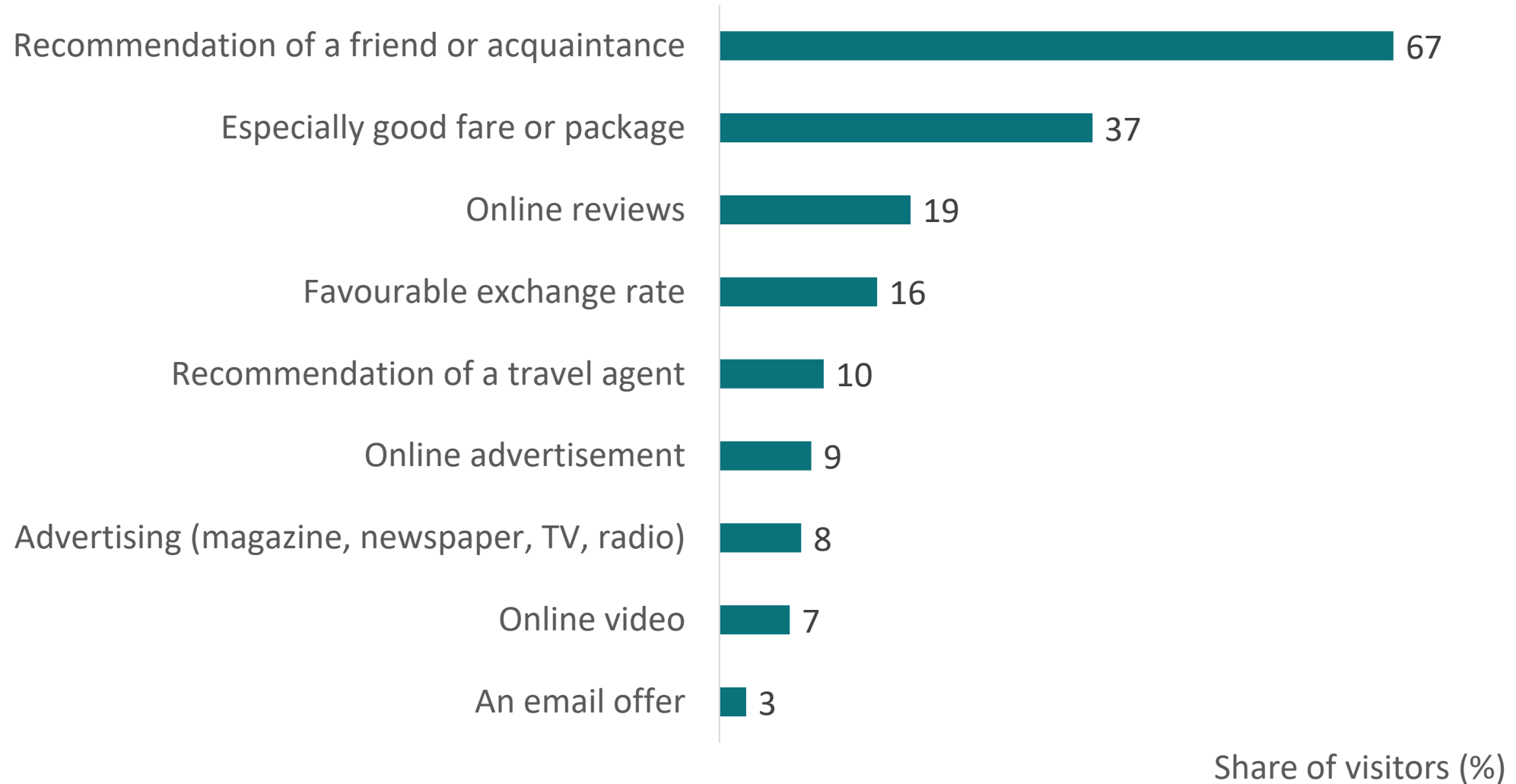
Scale: 1=Not at all important to 5=Extremely important

Influential factors on the decision to choose the Cook Islands



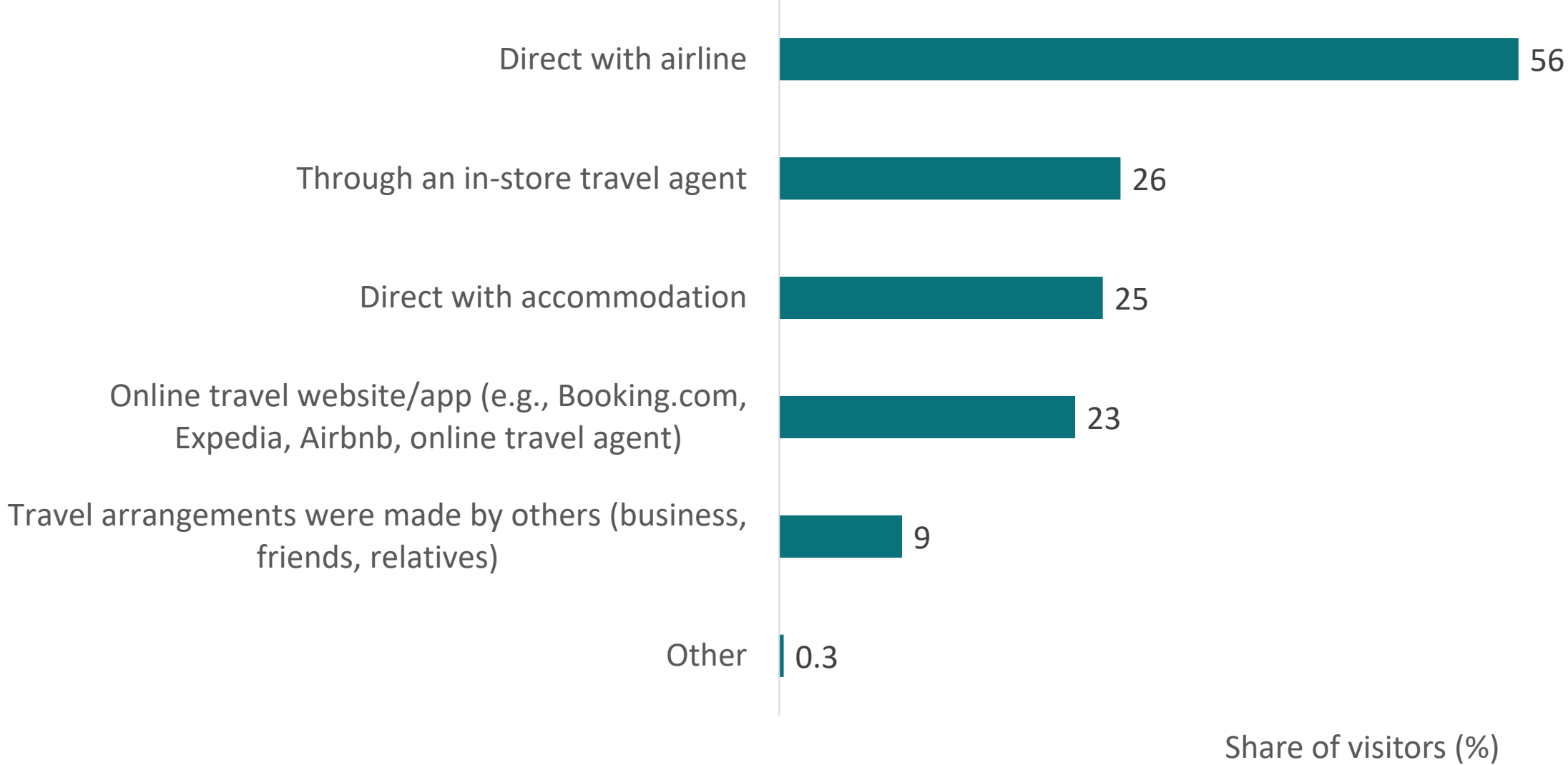
Scale: 1=Not at all important to 5=Extremely important

Important factors on the decision to travel to the Cook Islands



Note: Multiple responses, therefore total does not add up to 100%

Purchasing of Travel



Note: 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

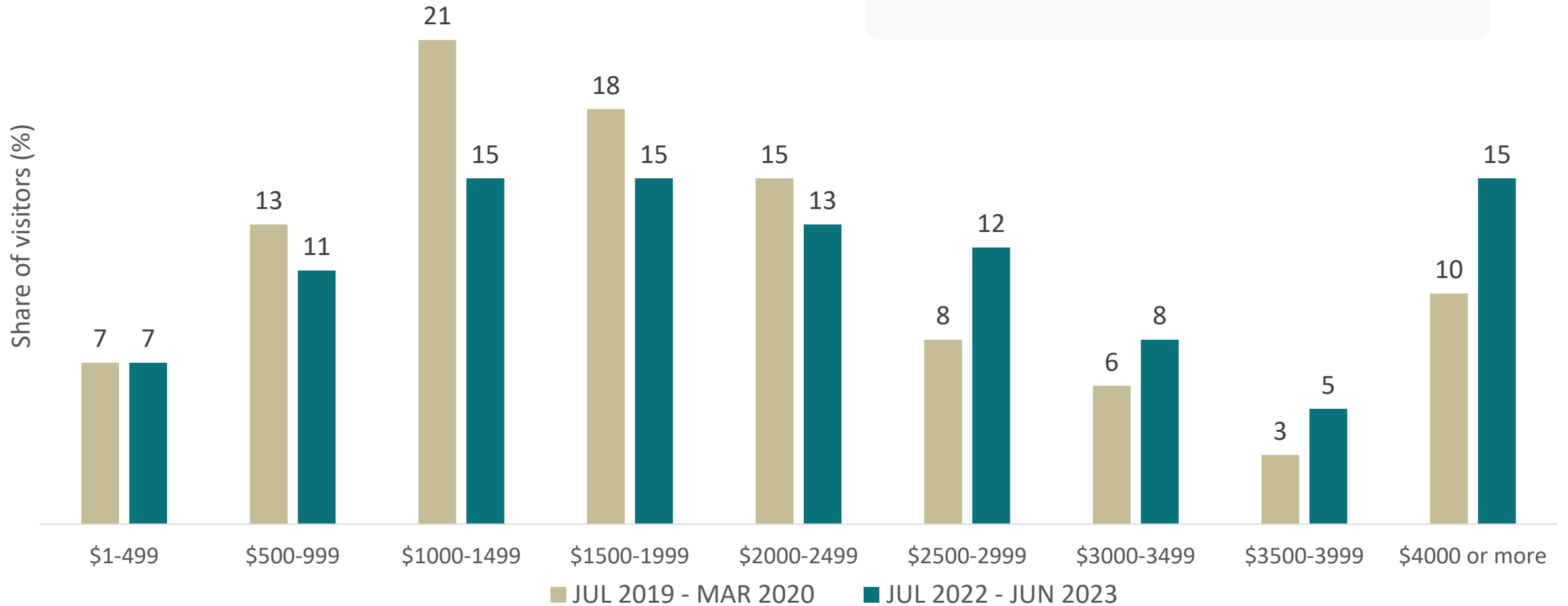
AVG. PREPAID PER PERSON

2,049

JUL 2019 - MAR 2020

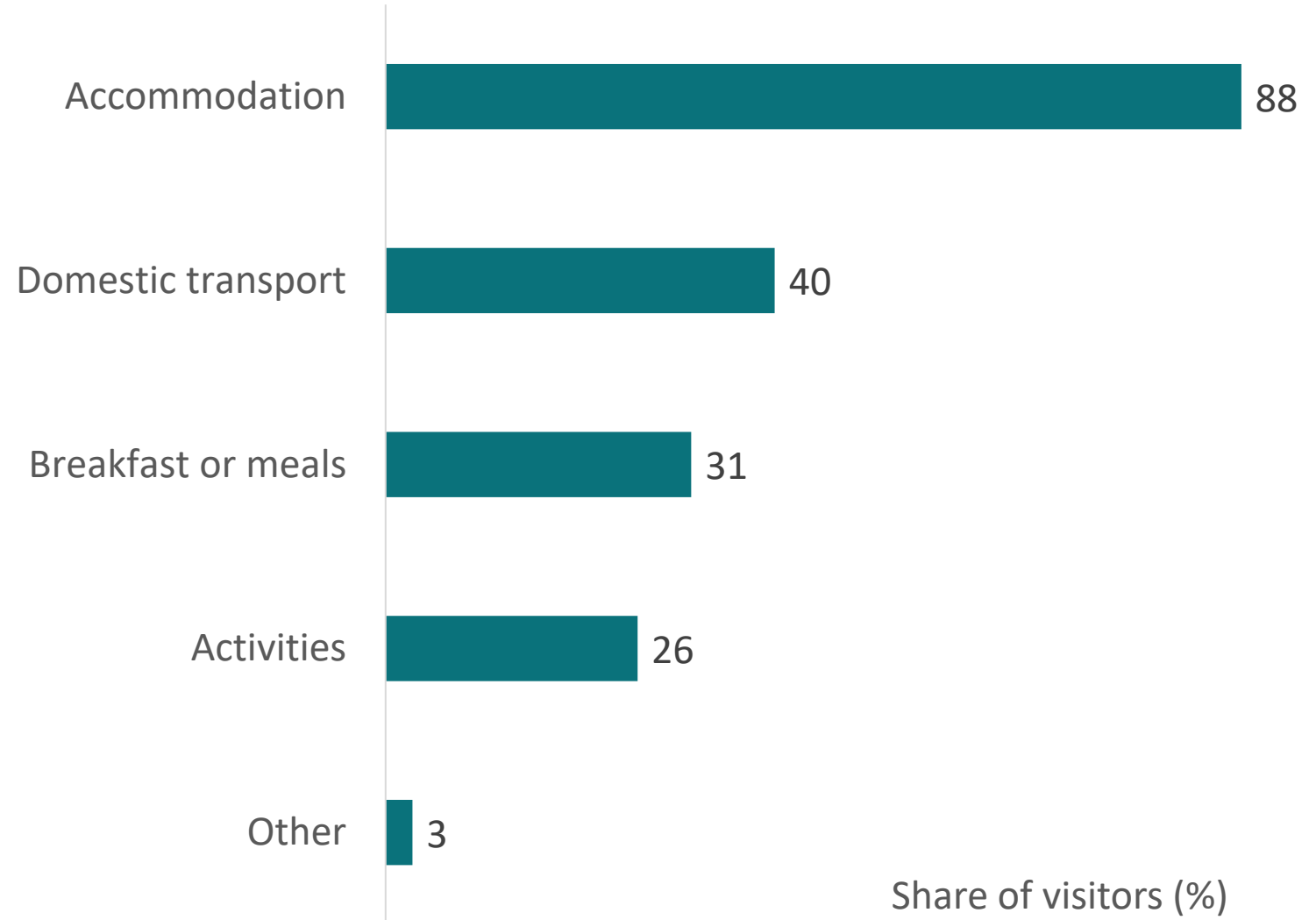
2,476

JUL 2022 - JUN 2023



Note: Average exchange rates for NZD from July 2019 - March 2020 and July 2022 to June 2023 applied.

Prepaid Items



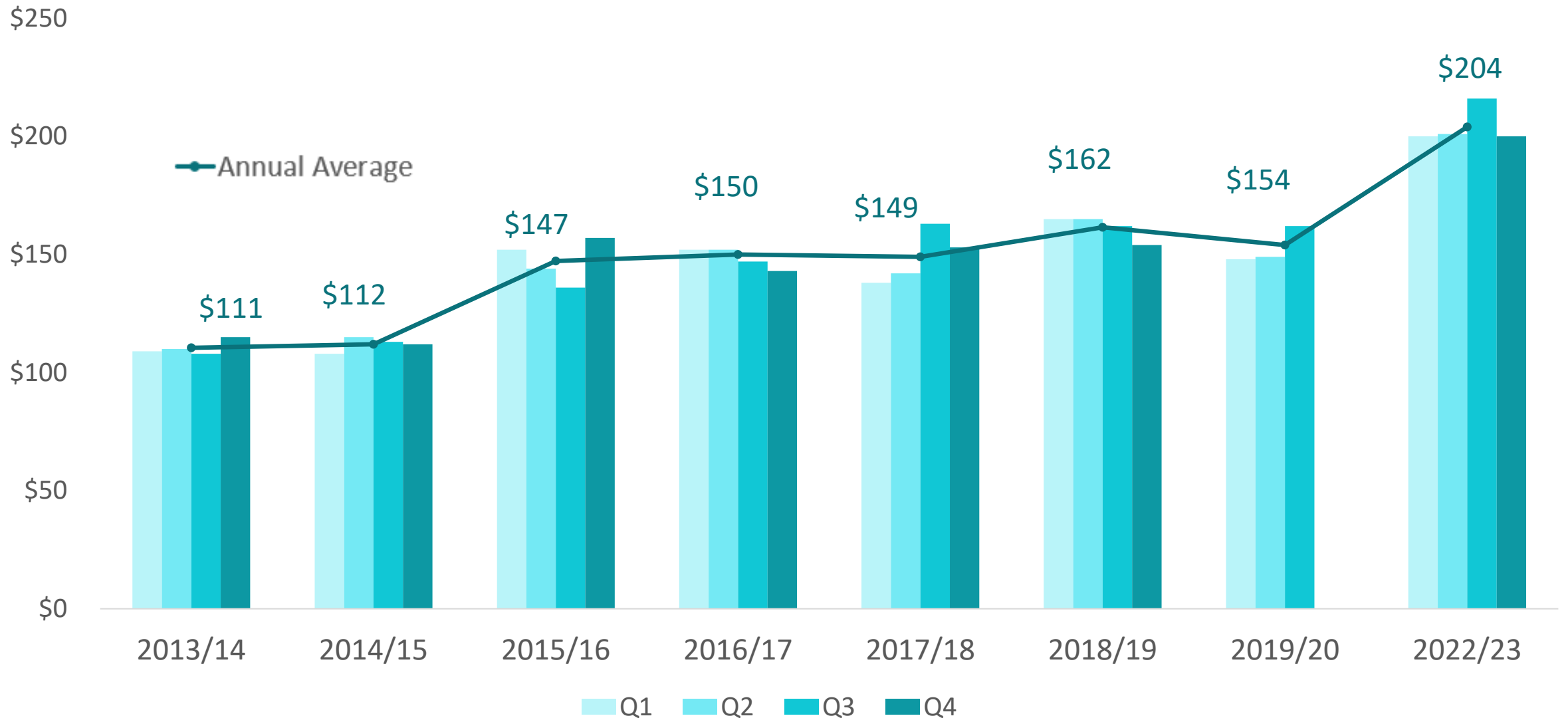
Share of visitors (%)

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

	Jul 2019-Mar 2020		Jul 2022-Jun 2023	
	<u>Per Person Per Day</u>	<u>% of sector</u>	<u>Per Person Per Day</u>	<u>% of sector</u>
Accommodation	62	40	85	42
Restaurants, Cafes & Bars	33	22	50	24
Vehicle Rental	10	7	13	6
Petrol	2	1	2	1
Domestic flights	9	6	10	5
Public transportation	1	0.5	1	0.4
Internet cost	3	2	2	1
Activities	13	8	14	6
Groceries	2	1	9	5
Shopping	8	5	16	8
Other	12	7	3	2
Total	154		204	

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

In-country Spend Per Person Per Day – Time series



Note: NZ dollars.

In-country Spend Per Person Per Day – Country of Origin

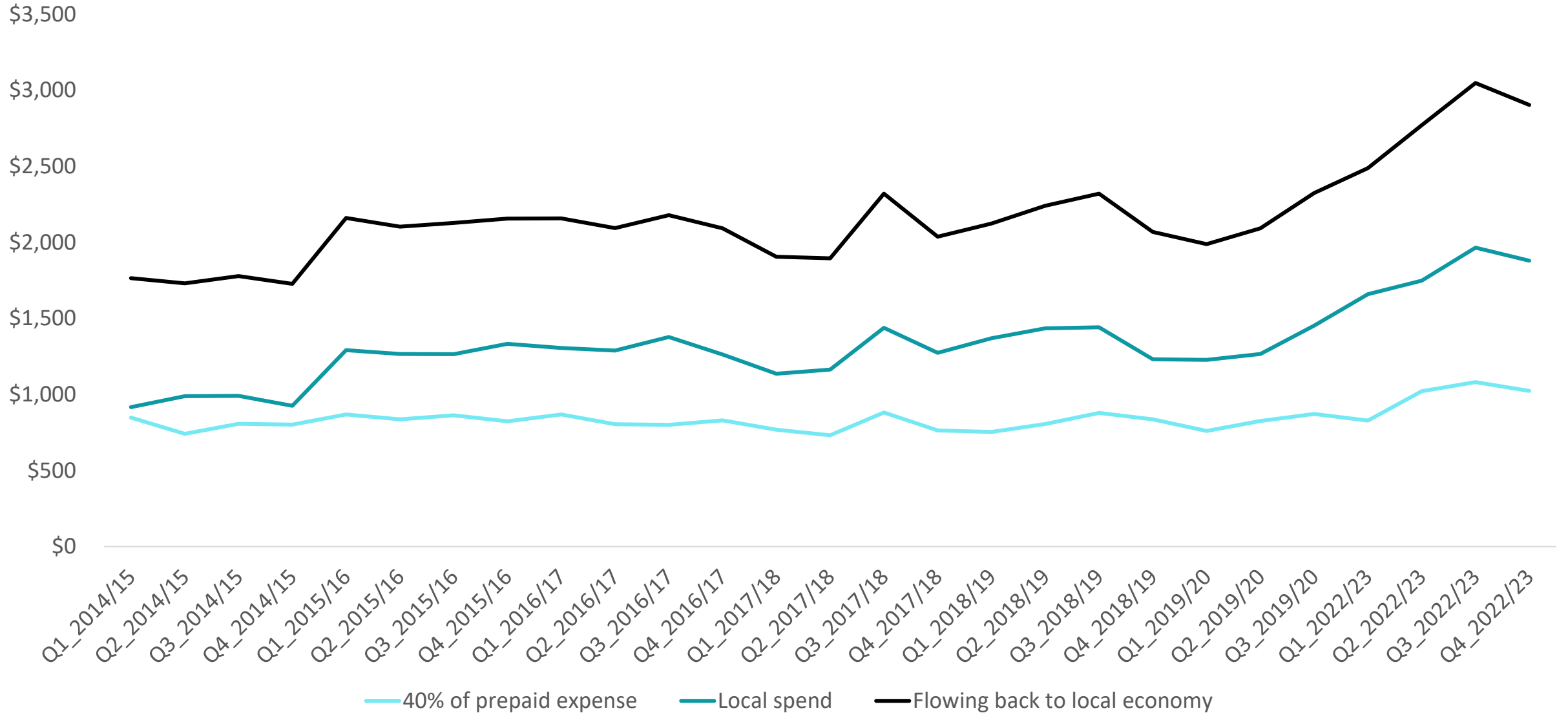


Note: NZ dollars.

Economic Impact – Per Person and Total

	Jul 2019-Mar 2020	Jul 2022-Jun 2023
Average Spend Prior to Arrival	NZD	NZD
Per Person Per Trip	2,049	2,476
<i>Flowing into local economy rate – estimated</i>	40%	40%
Per Person Per Trip	820	989
Per Person per Day	96	111
<hr/>		
Average Local Spend		
<i>Length of Study (nights) - mean</i>	8.5 nights	8.9 nights
Per Person Per Trip	1,316	1,814
Per Person per Day	154	204
<hr/>		
Total Economic Impact-Per Trip	2,136	2,803
Total Economic Impact-Per Day	250	315

Economic Impact – Time series



Note: NZ dollars.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact



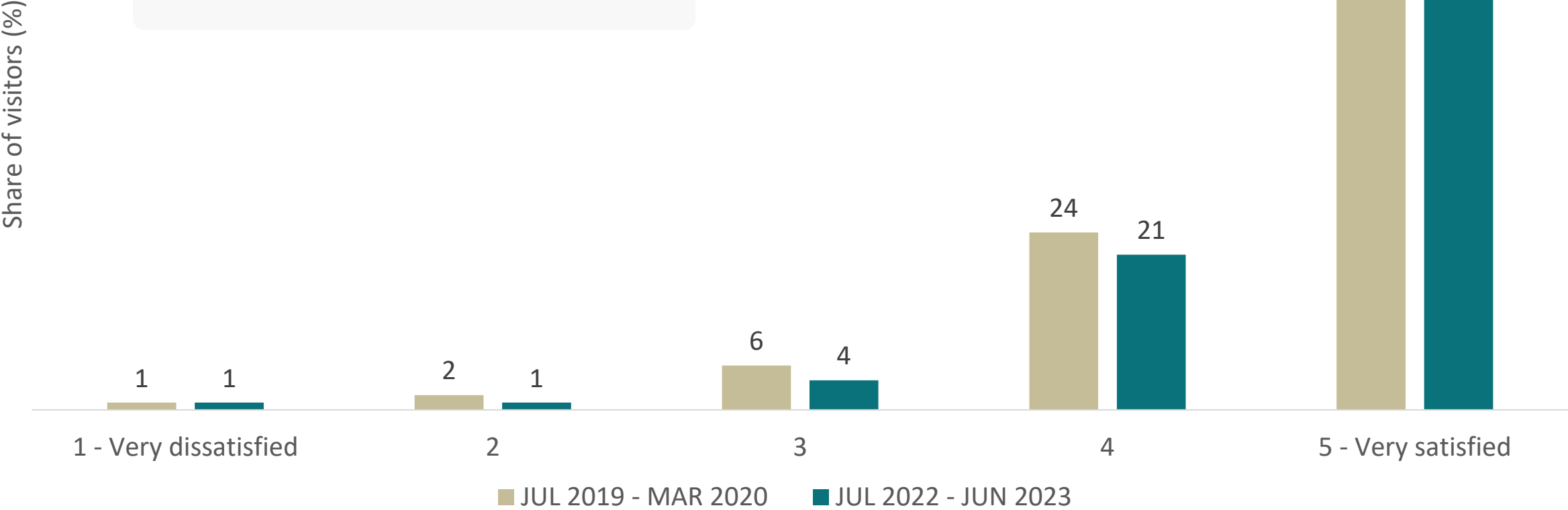
Visitor
Satisfaction

Visitor Overall Satisfaction

AVG. OVERALL SATISFACTION

4.5 | **4.7**

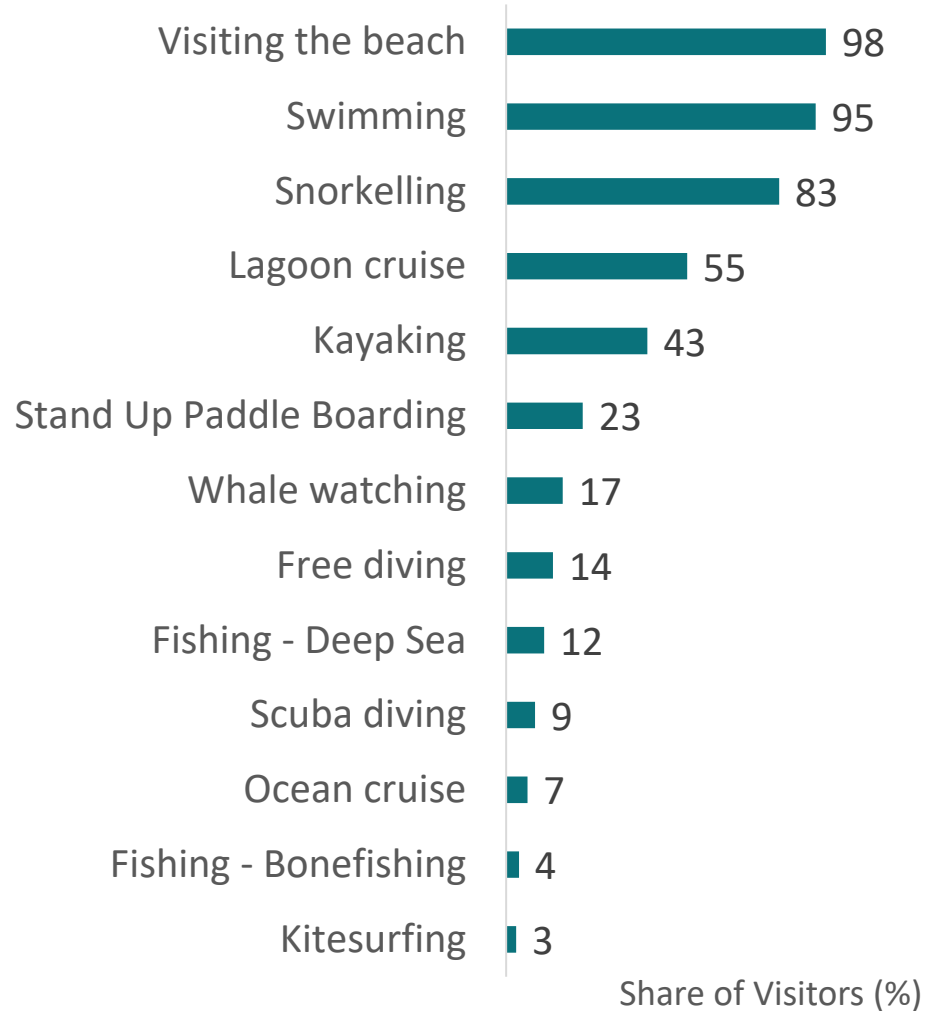
JUL 2019 - MAR 2020 | JUL 2022 - JUN 2023



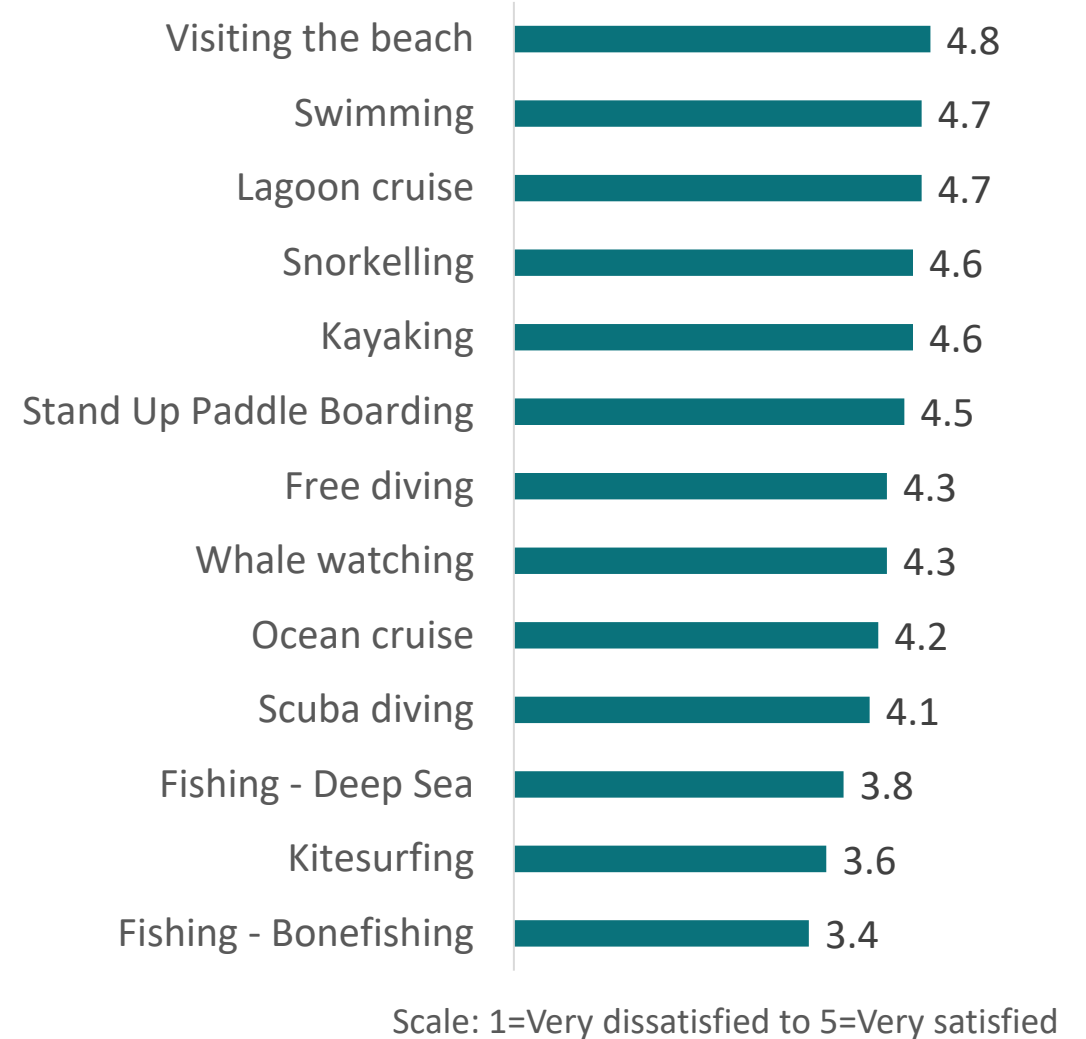
Note: Due to rounding, some totals do not sum to 100%.

Water-based Activities

Participation



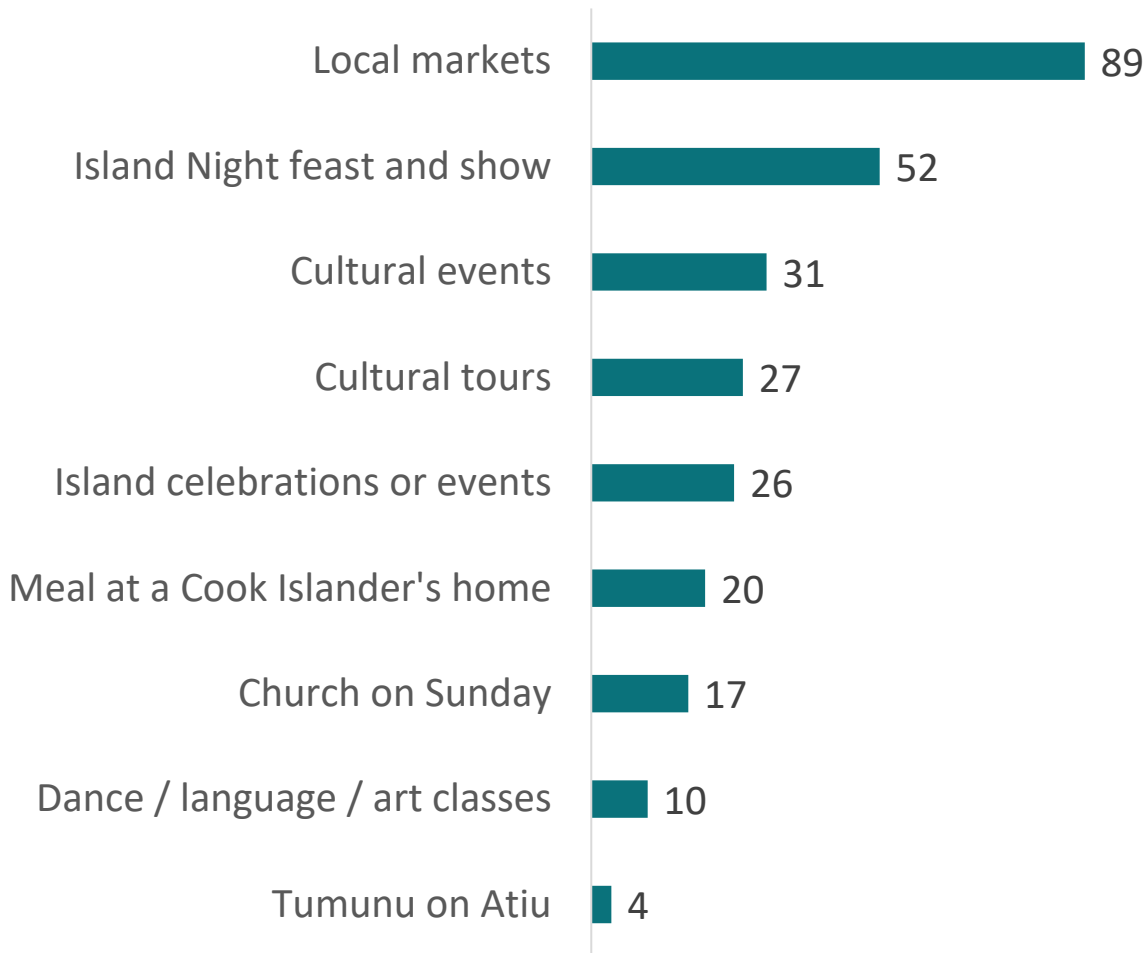
Satisfaction



Note: Multiple responses, so total does not add up to 100%

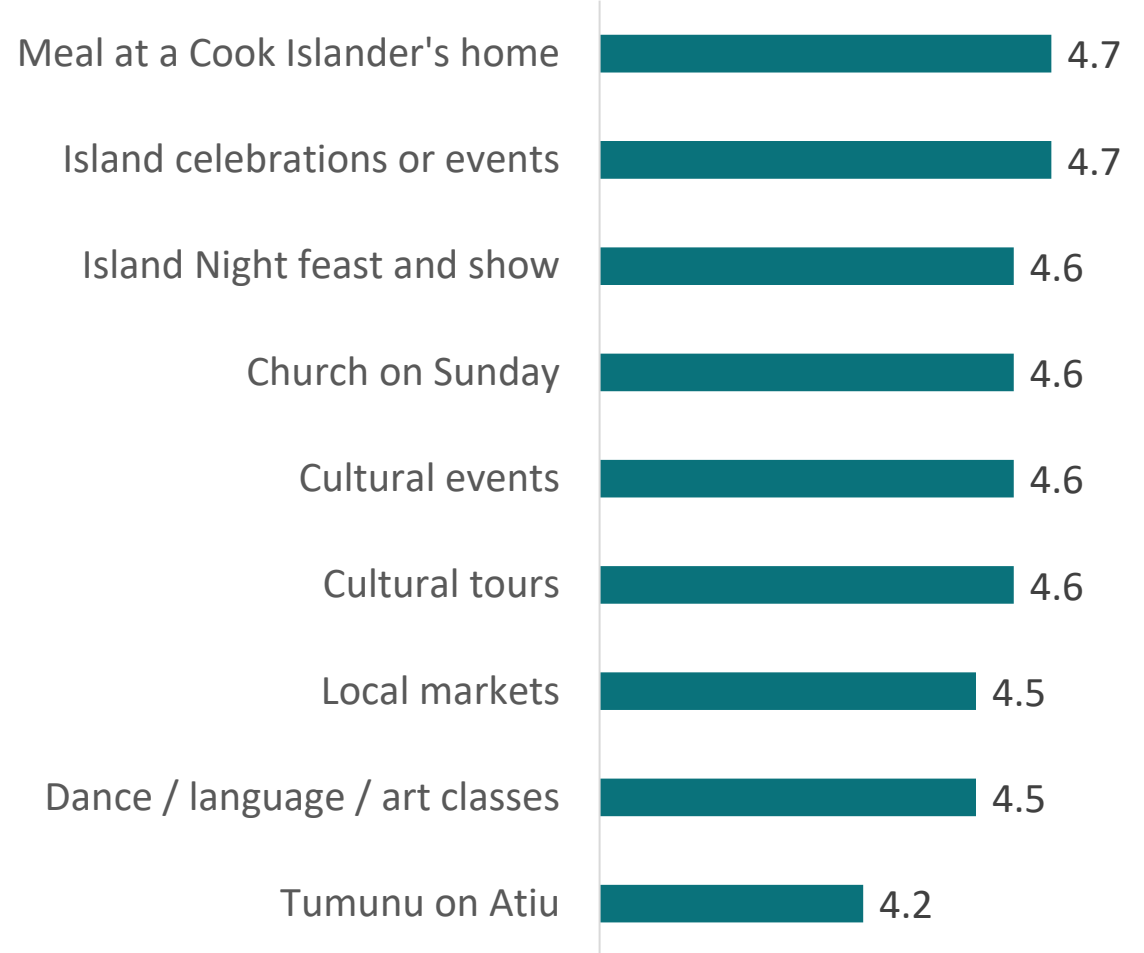
Cultural Interaction

Participation



Share of Visitors (%)

Satisfaction

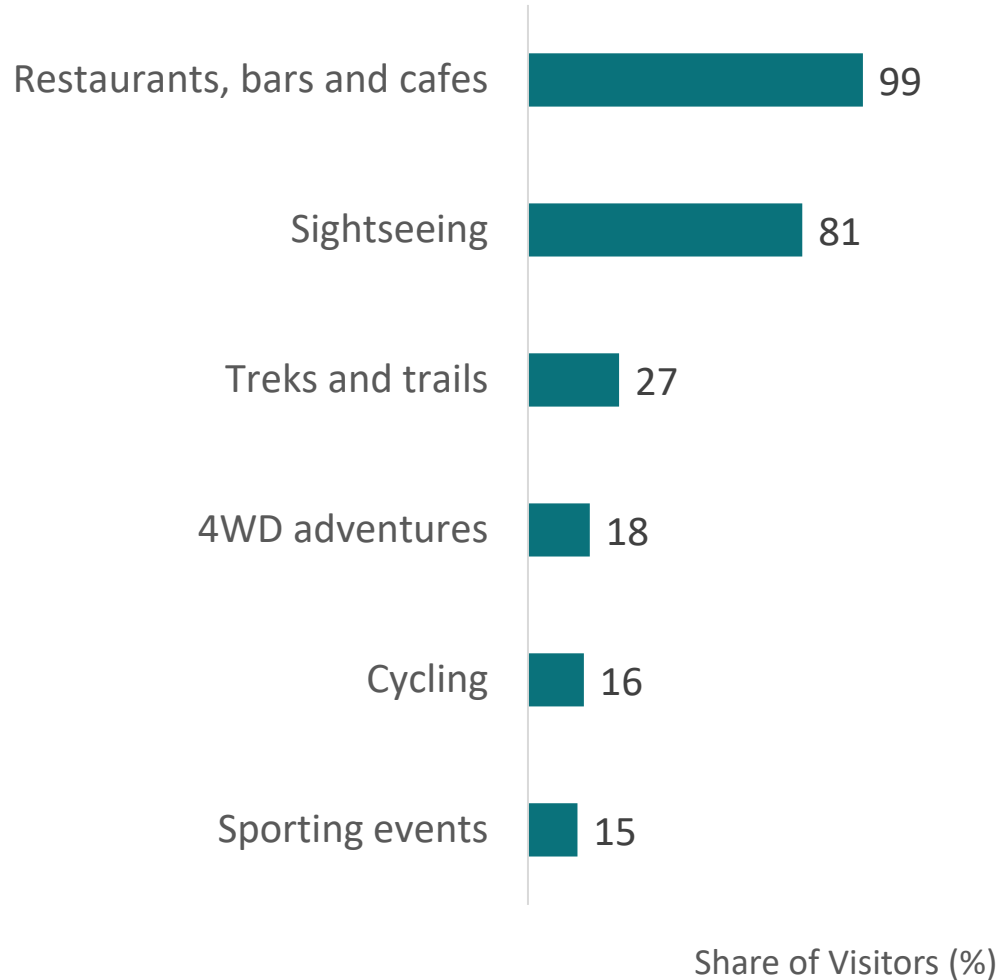


Scale: 1=Very dissatisfied to 5=Very satisfied

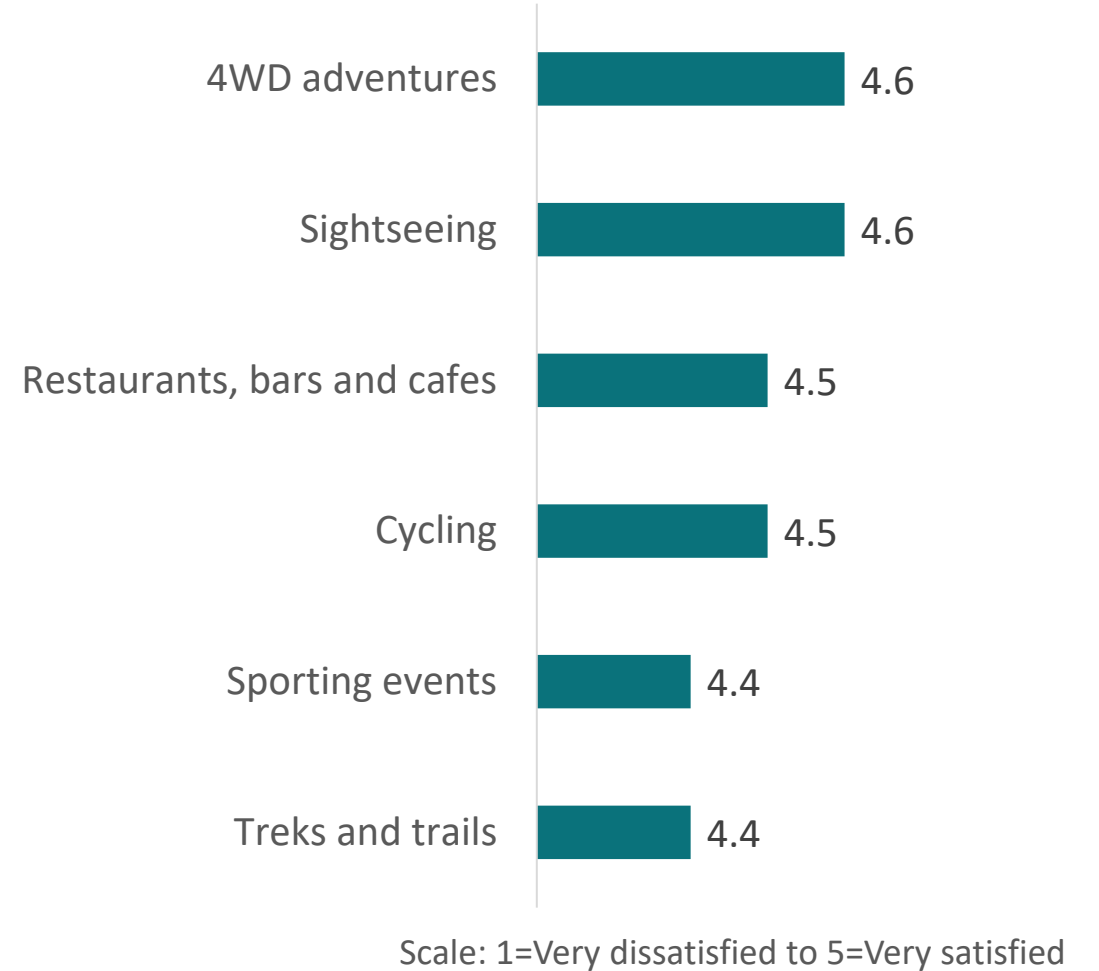
Note: Multiple responses, so total does not add up to 100%

Land-based Activities

Participation



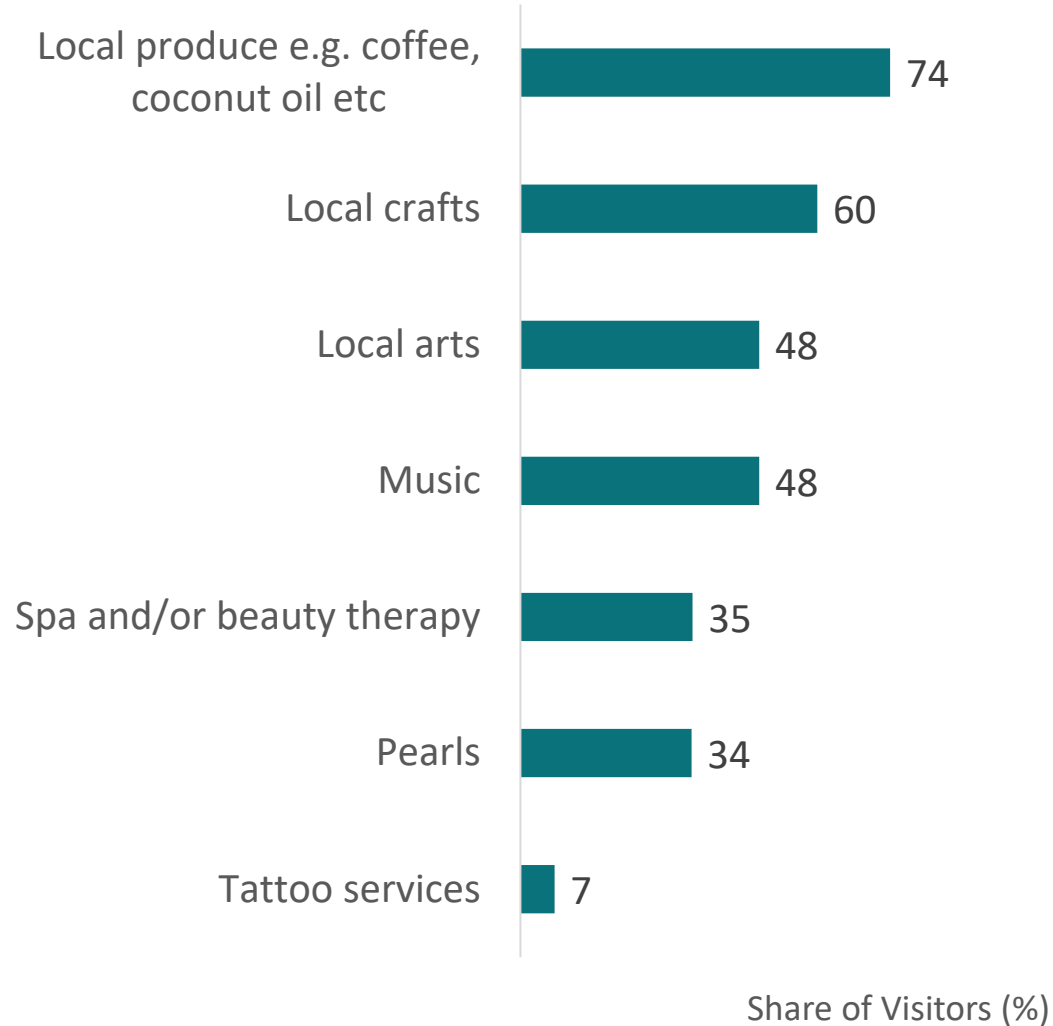
Satisfaction



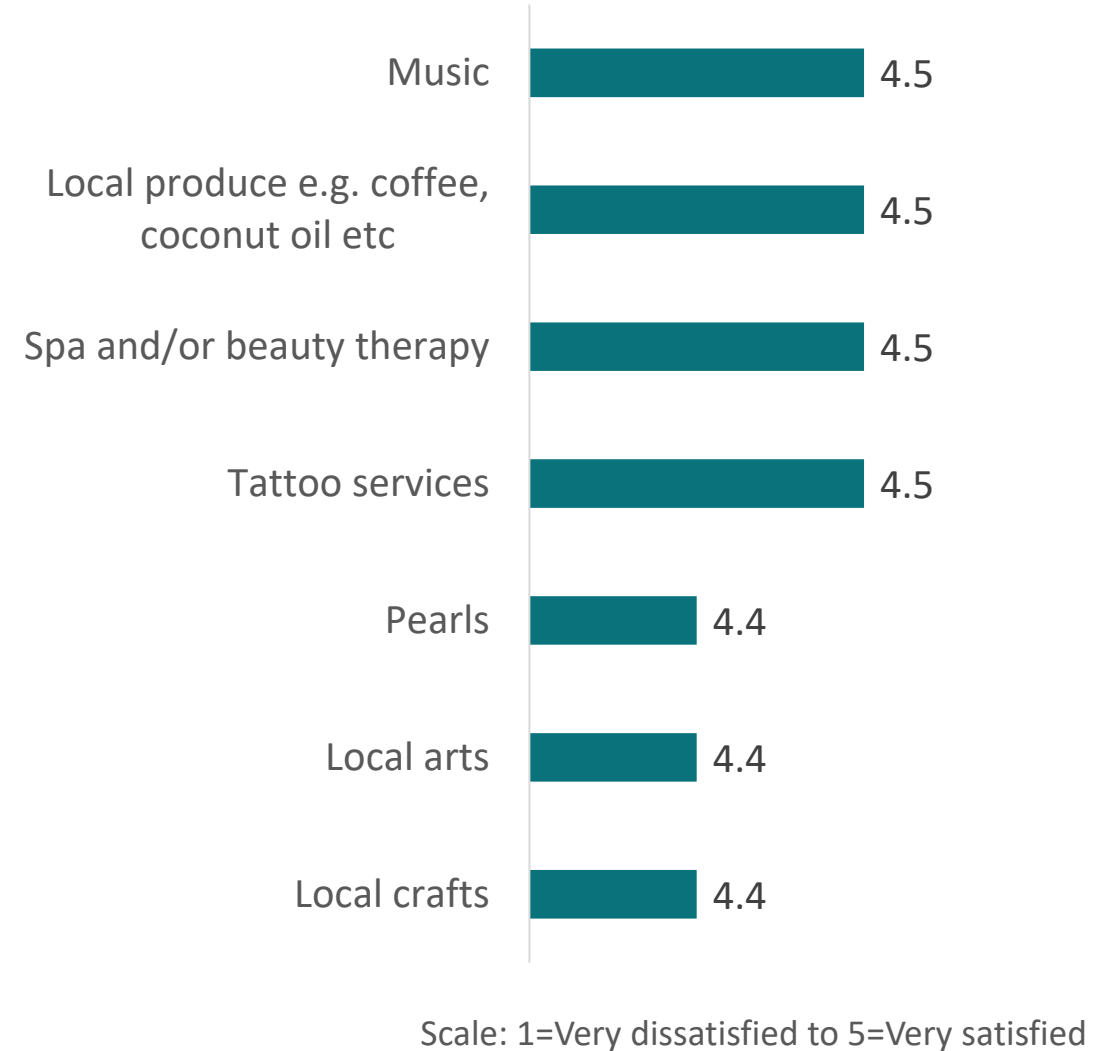
Note: Multiple responses, so total does not add up to 100%

Shopping Activities

Participation

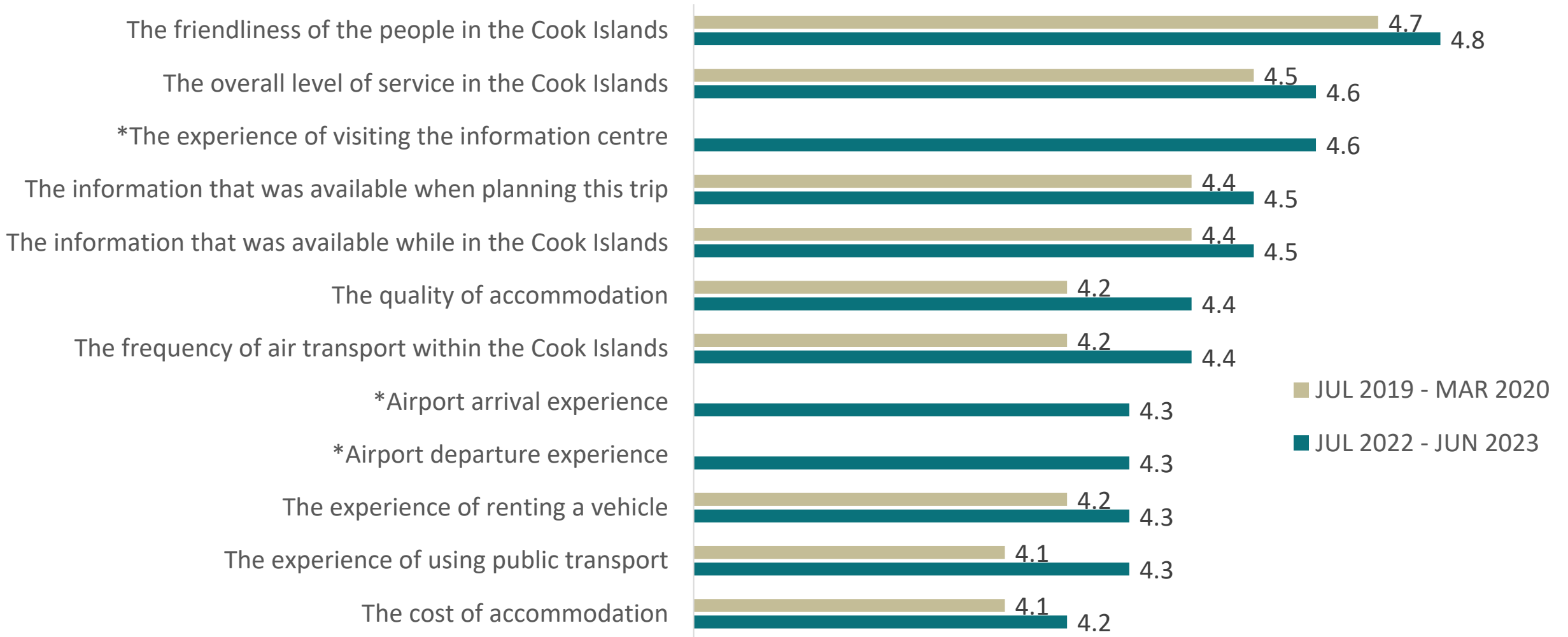


Satisfaction



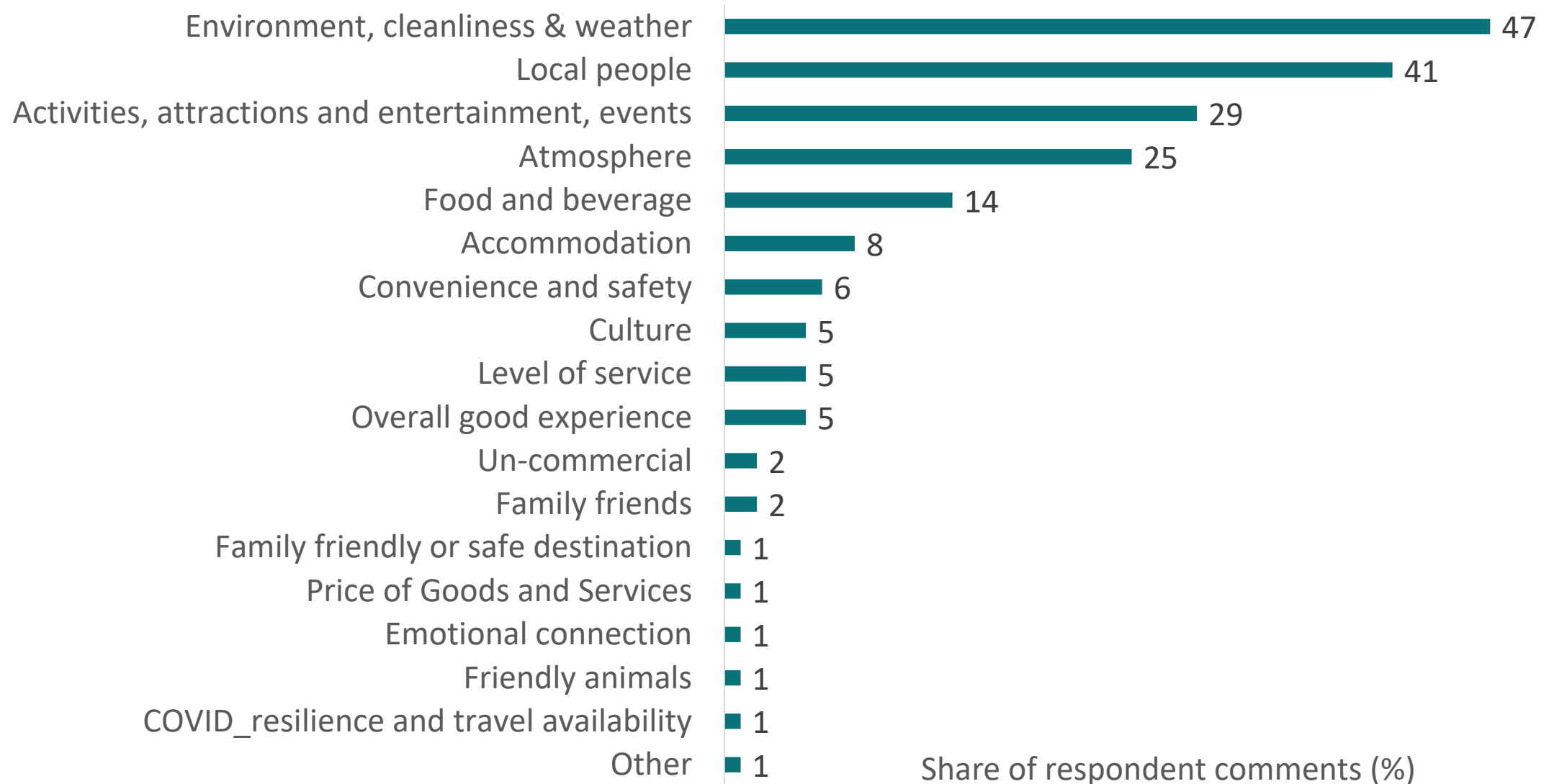
Note: * n < 10. Multiple responses, so total does not add up to 100%

Satisfaction with Cook Islands Services



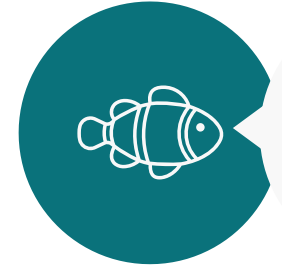
Scale: 1=Very dissatisfied to 5=Very satisfied

Most Appealing Aspects of the Cook Islands



Share of respondent comments (%)

Most Appealing – Environment, Cleanliness and Weather



47%

Share of
comments

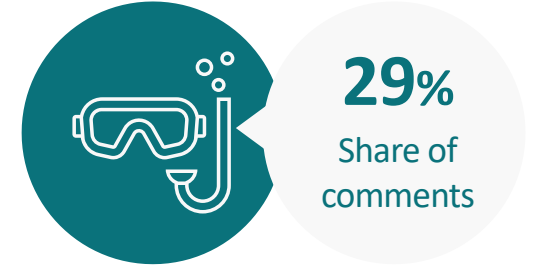
- + The beautiful ocean with all the colourful fish and turtles.
- + Natural environment both on shore and in the water.
- + Warm temperature. White sandy beaches and Gin clear water.
- + Beauty of the island-trees, lagoon, reef and sea.
- + Heaven landscape and best dives ever.
- + Just relaxing on a quiet white sandy beach under palm trees and dipping into the water was heavenly.
- + The ability to swim with the turtles.
- + The Cook Island experience was as described on the tin- warm sun, warm waters, warm people- had a totally relaxing holiday.

Most Appealing – Local People



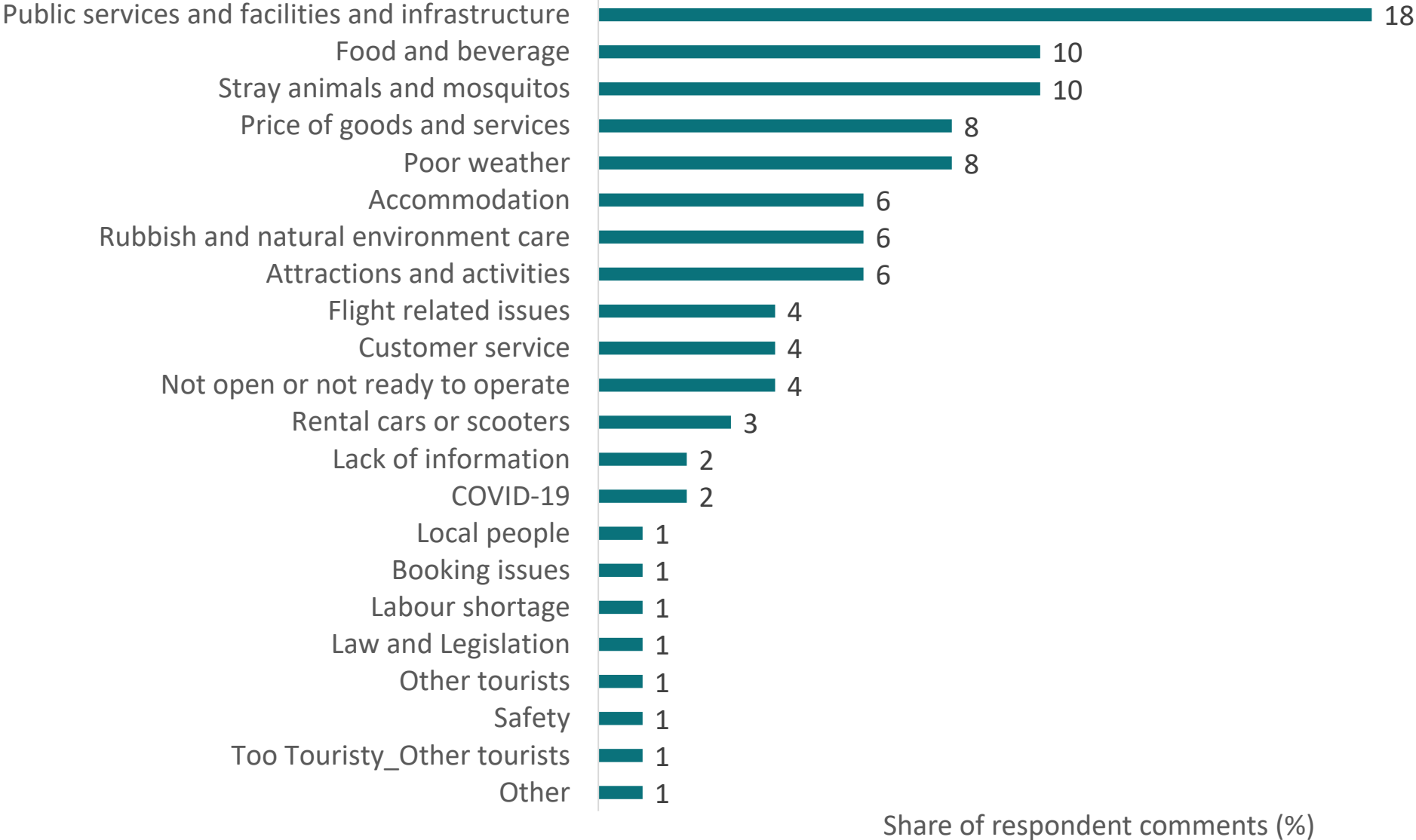
- + The fun-loving generous nature of the people.
- + The people were friendly and accommodating.
- + The people ..we got treated like we were family I cant wait to come back.
- + They are the most friendliest and helpful people I have met in any of My travels.
- + Friendly people who care about their island. Service with lots of smiles
- + The friendliness of everyone. The bus drivers were great with helping our pronunciation of Cook Islands Māori
- + The people of the Cook Islands are very warm and friendly. We were able to engage in great conversation with many locals to learn about the cultural diversity.

Most Appealing – Activities, Attractions and Entertainment



- + Well run canoe racing.
- + Raro buggy tours was a highlight!!
- + Lagoon cruise and sailing are wonderful.
- + Day trip to Aitutaki & swimming with turtles on Rarotonga.
- + Day boat tour to one foot island including the snorkelling and lunch provided.
- + Night market food was exceptional.
- + Visiting Mike Tavioni's traditional Vaka workshop. Discovering Rito products.
- + Participating in Tivaevae, walking down the beach and going to the markets

Least Appealing Aspects of the Cook Islands



Share of respondent comments (%)

Note: Total responses for the question N=1,548. Multiple responses, so total does not add up to 100%.

Least Appealing - Public Service and Infrastructure



18%

Share of
comments

- + Bumpy roads for cycling and lots of places being out of petrol for scooters
- + The road conditions and nighttime lighting.
- + Lack of signage to be able to find things (e.g., house numbers).
- + Internet unreliability and system - one of us spent a lot of her time trying to track down useable internet.
- + Hard to get cash and many places could not take cards.
- + Drinking water. Internet, bus condition.
- + The wait to get through customs after landing.

Least Appealing Aspects – Food and Beverage



10%
Share of
comments

- + Breakfasts at the resort were the same every day - after 10 days they were boring.
- + We wanted to try more traditional and local food. But there was just mostly western style food.
- + Quality of the food at most restaurants was poor, especially for vegetarian travellers
- + Limited gluten free food options in shops/supermarket.
- + Lack of supply of any quality fruit or veg in the supermarkets. Limited supply of seafood.
- + Hot serve food at supermarkets didn't appear to be heated and kept at safe hot food temperatures.

Least Appealing - Stray Animals and Mosquitos



10%
Share of
comments

- + Mosquitos and dengue fever risk.
- + Wandering dogs, some of which aggressively barked at us when we walked past them.
- + The roosters crowing not just at dawn but all the night!
- + Dogs everywhere. And noisy roosters!
- + The only downside I can think of is the insects. At one point, there was an ant issue in one of the rooms we stayed in.
- + 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 Aspects – Price of goods and services



8%
Share of
comments

- + Expensive mobile data.
- + Low quality of accommodation relative to the price, water activities were also overpriced.
- + Expensive food, especially the night market.
- + Hard to find local fresh fruit and vegies for a more affordable price.
- + The cost of basic goods from the local shops was quite expensive.
- + Accommodation really expensive. Alcohol too expensive.
- + Cost of renting e-bikes is very high.

Suggestions for Improvement



Note: Total responses for the question N=621. Multiple responses, so total does not add up to 100%.

Suggestions for Improvement - Indicative Quotes

- + Animal control. Road surface.
- + More accurate bus information. Bus app didn't detect all buses. Timetables and punctuality poor.
- + Quicker processing at customs and airbridge to plane.
- + More accessible local food, fruits and seafood.
- + We had a cancelled flight & wanted to talk to someone from Air NZ but could not. They should have a desk at the airport.
- + Direct flights from/to Australia.
- + The food at the resort, cost of accommodation. General resort prices were quite high.
- + More variety of activities for non-sporty people.

Willingness to Return

94%

Yes



TOTAL
1,615
VISITORS

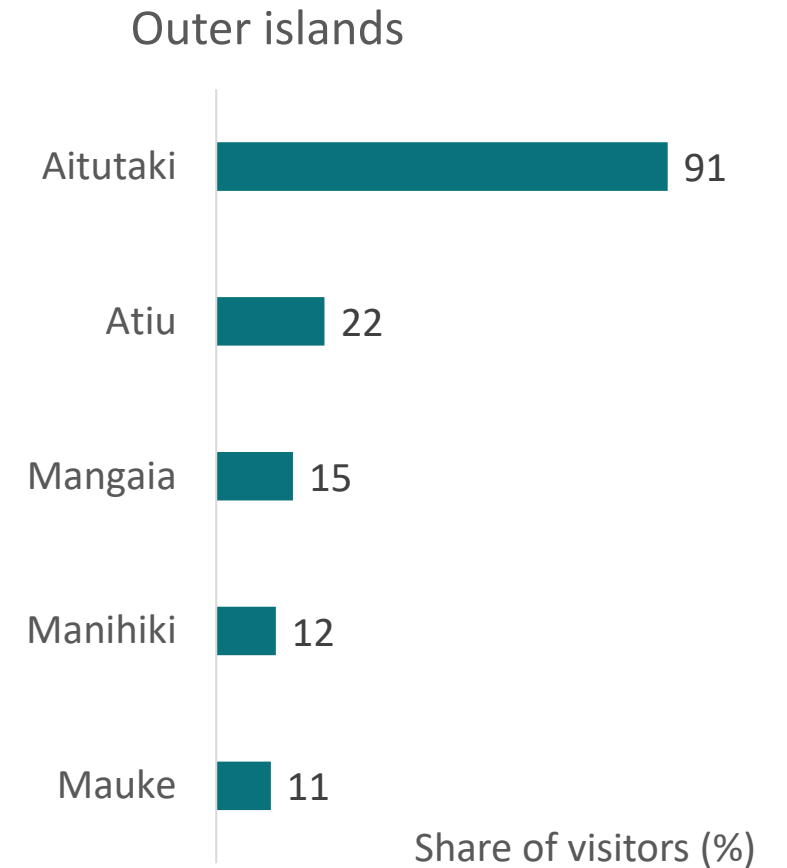
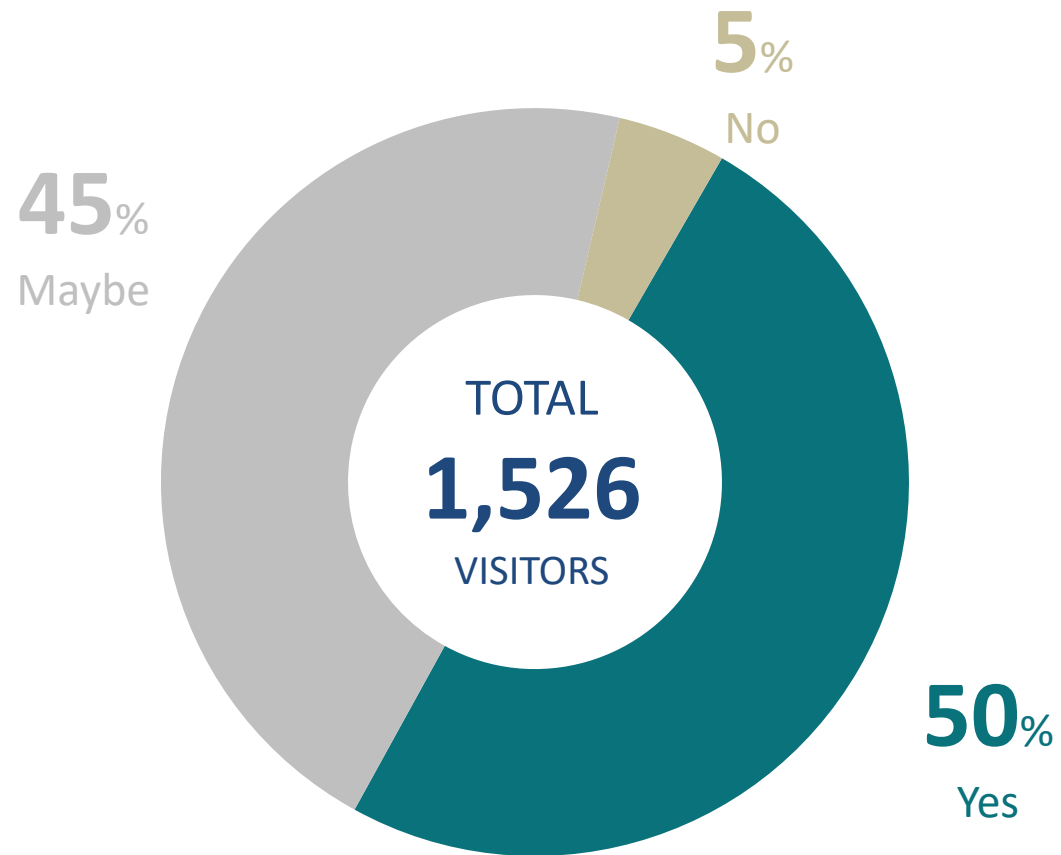
6%

No

Reasons for Not Willing to Return -Indicative Quotes

- + Been there twice now and want to explore other islands.
- + I am old and it was a long couple of flights home.
- + Weather unpredictable and not much to do when it is bad.
- + Only if flight costs reduce, otherwise we go to Fiji.
- + Expensive food, not a lot of variety of food.
- + The terrible DOG problem - you are trapped in your hotel as it's not safe to walk streets day or night as dogs attack.

Willingness to Visit Outer Islands



Willingness to Recommend



Reasons for Not Willing to Recommend - Indicative Quotes

- + Too far and had to overnight in Auckland and Fiji is closer.
- + Would say yes but cautious of price.
- + Still developing tourism. Better facilities and closer-to-home options are available elsewhere.
- + Service was poor, attitude of resort staff was poor, food was below average, and everything was very expensive.
- + Samoa way cheaper, loads of culture and amazing restaurants. Also, at resorts in Samoa if you are in the beach the waiters come down to the beach for drink and food orders but not in the Cook islands.

Thank you

AUT



Authorship: D. Zhu, B. Bai, P. Kim and M. Orams