

# Pacific Tourism Data Initiative

## Cook Islands

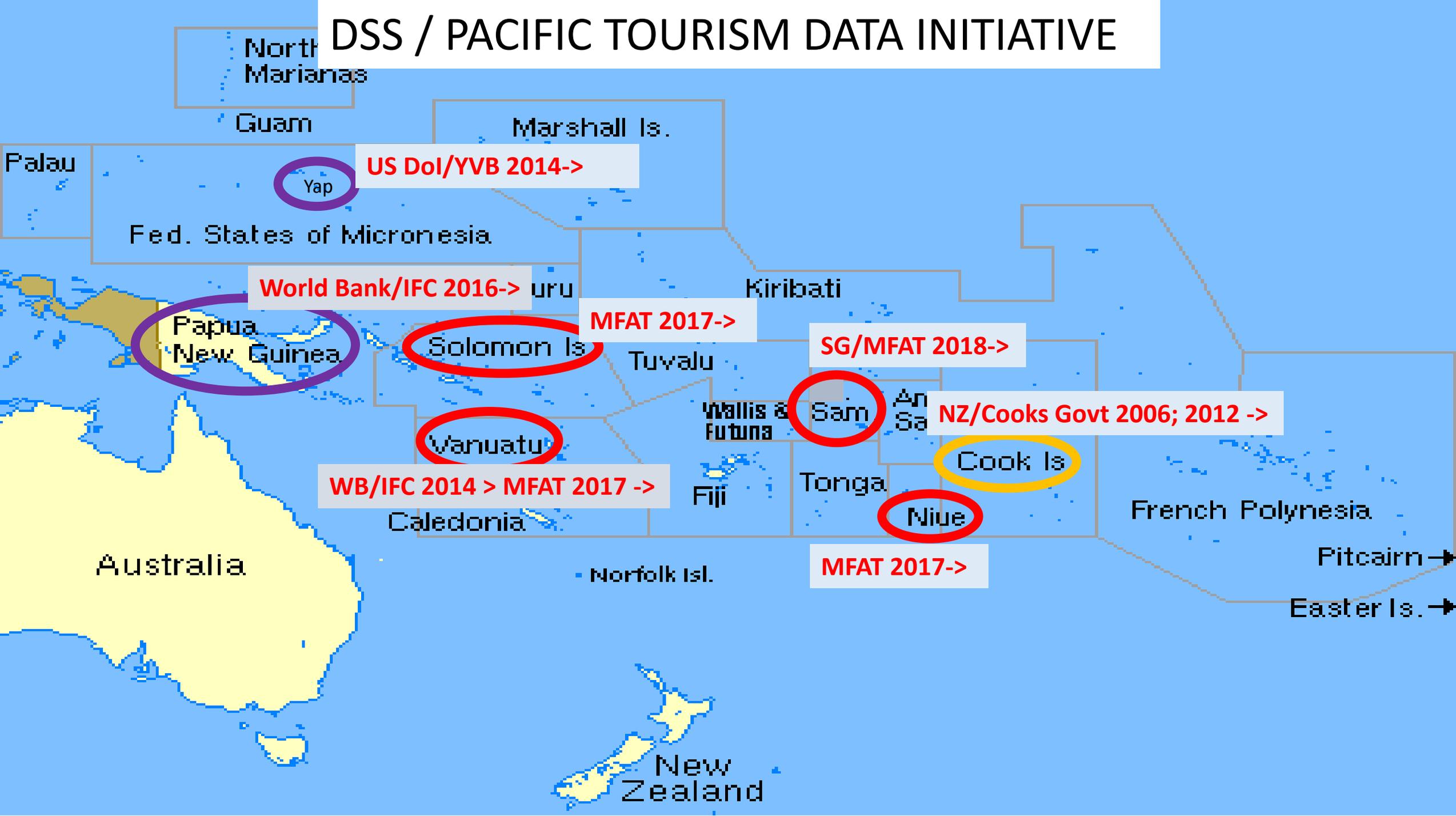
International Visitors, Business Confidence and Community Attitudes



Simon Milne  
November 2019  
USP Campus, Avarua, Rarotonga

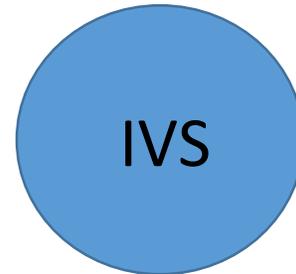
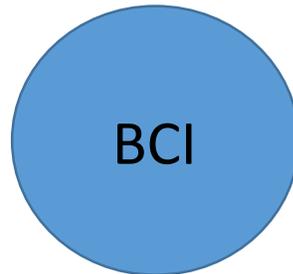


# DSS / PACIFIC TOURISM DATA INITIATIVE

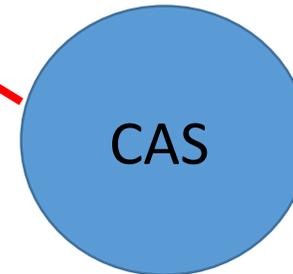
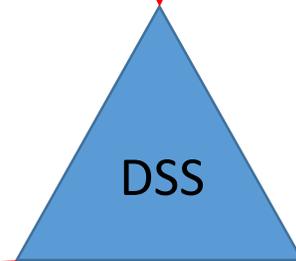


# THREE PILLARS OF A DECISION SUPPORT SYSTEM

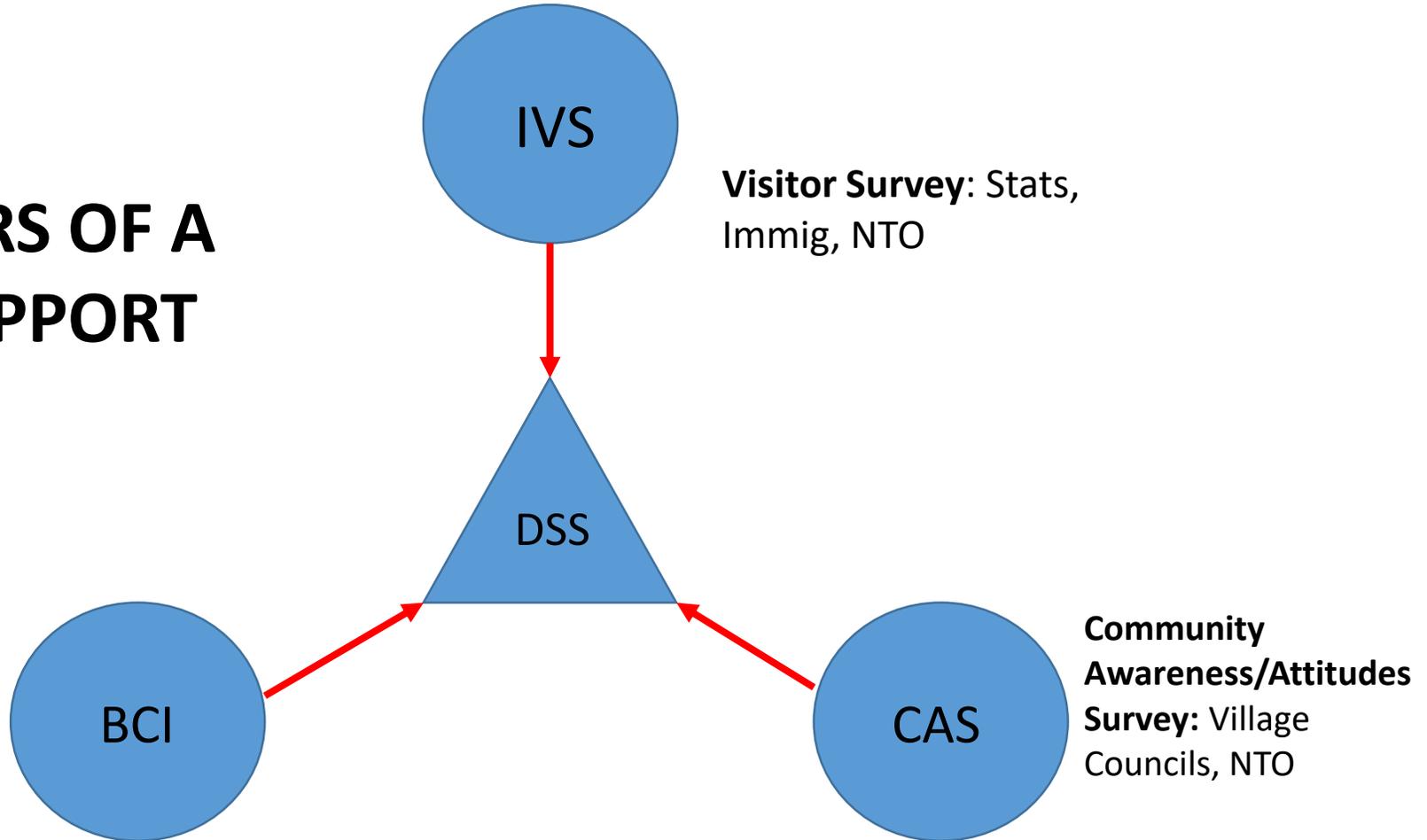
**Business Confidence  
Index/Survey:**  
Chamber of Comm.,  
Sector Orgs, Stats,  
NTO



**Visitor Survey:** Stats,  
Immig, NTO



**Community  
Awareness/Attitudes  
Survey:** Village  
Councils, NTO



# Cook Islands PTDI Resources

[www.nztri.org.nz/cook-islands-resources](http://www.nztri.org.nz/cook-islands-resources)

# Cook Islands International Visitor Survey

2012 – 2019



# 2012/13 – 2018/19 Respondents



Total number of e-mails sent: **129,411**

CONVERSION RATE OF **22%**



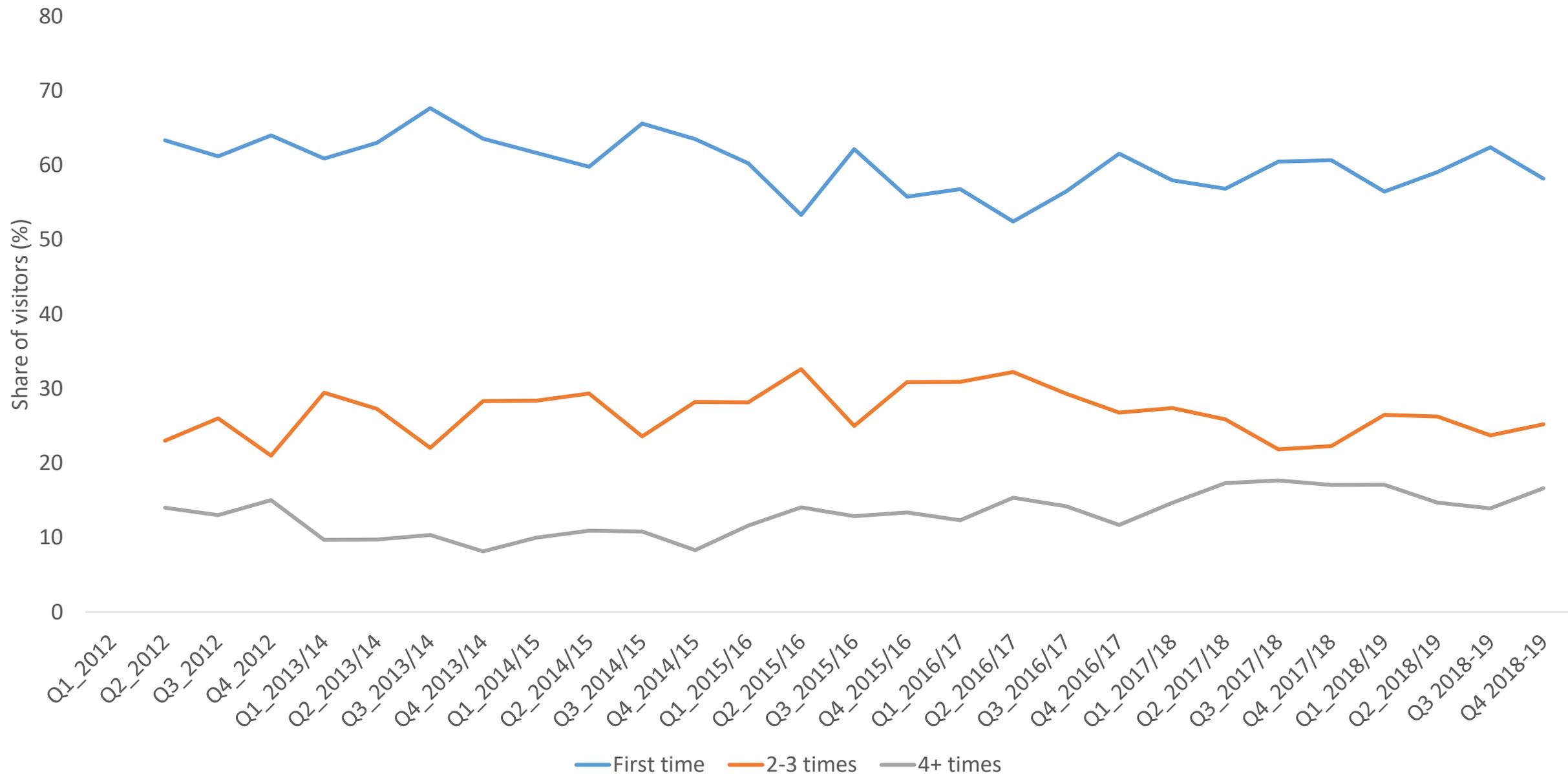
Total number of responses: **28,926**

**6.5%** OF ALL VISITORS DURING THE PERIOD

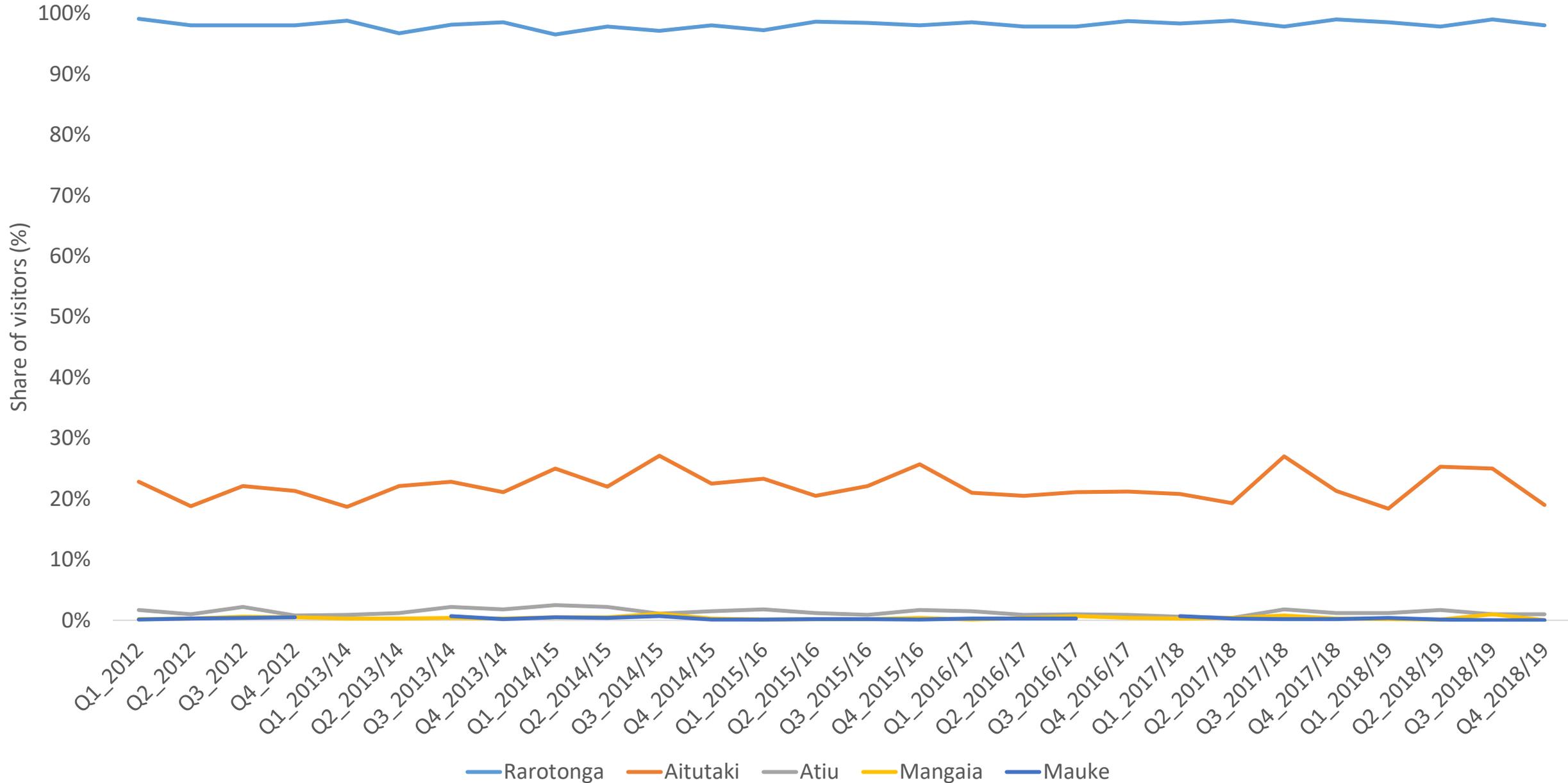


Responses cover a total of  
**56,103 adults** and **8,125 children**

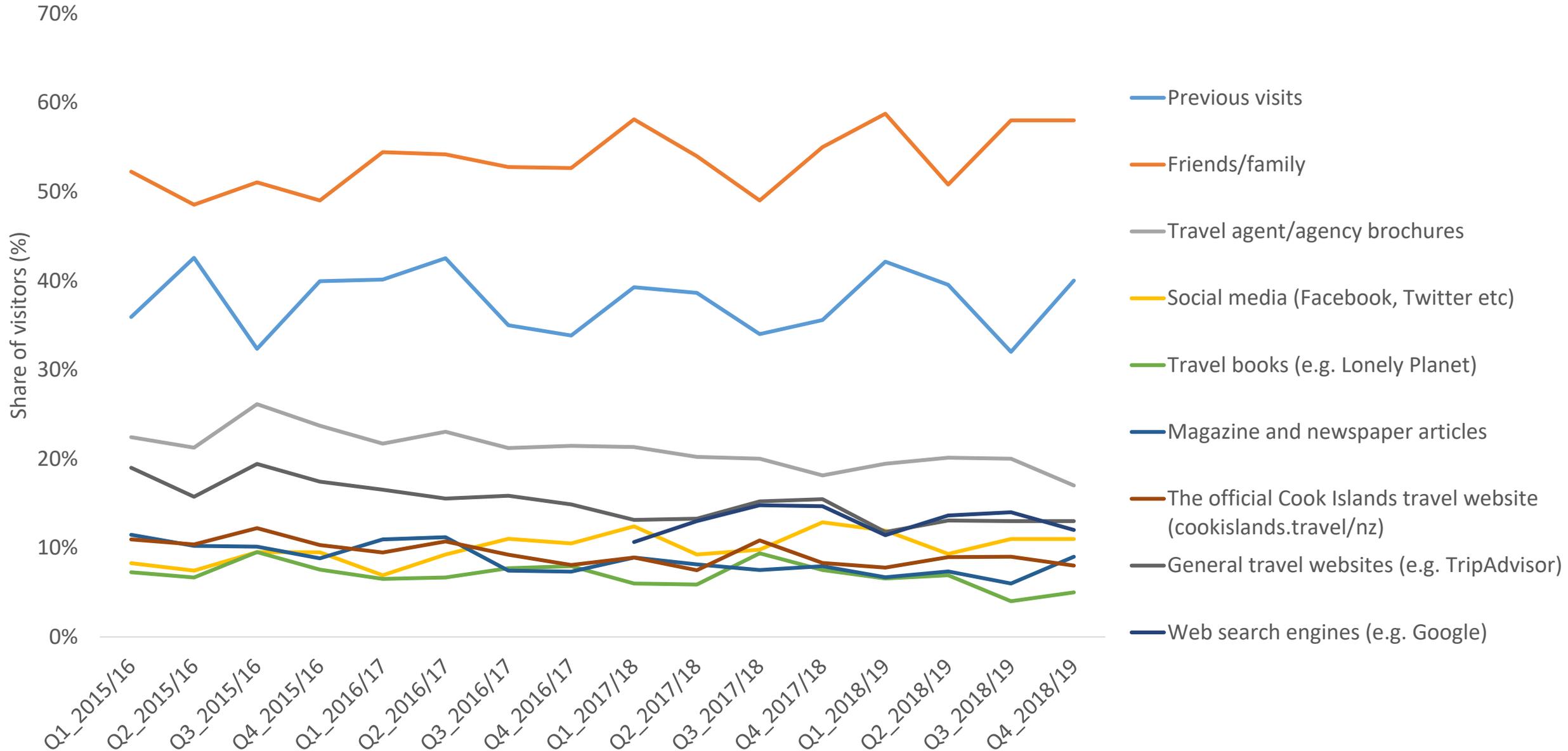
# Previous Visits



# Islands Visited

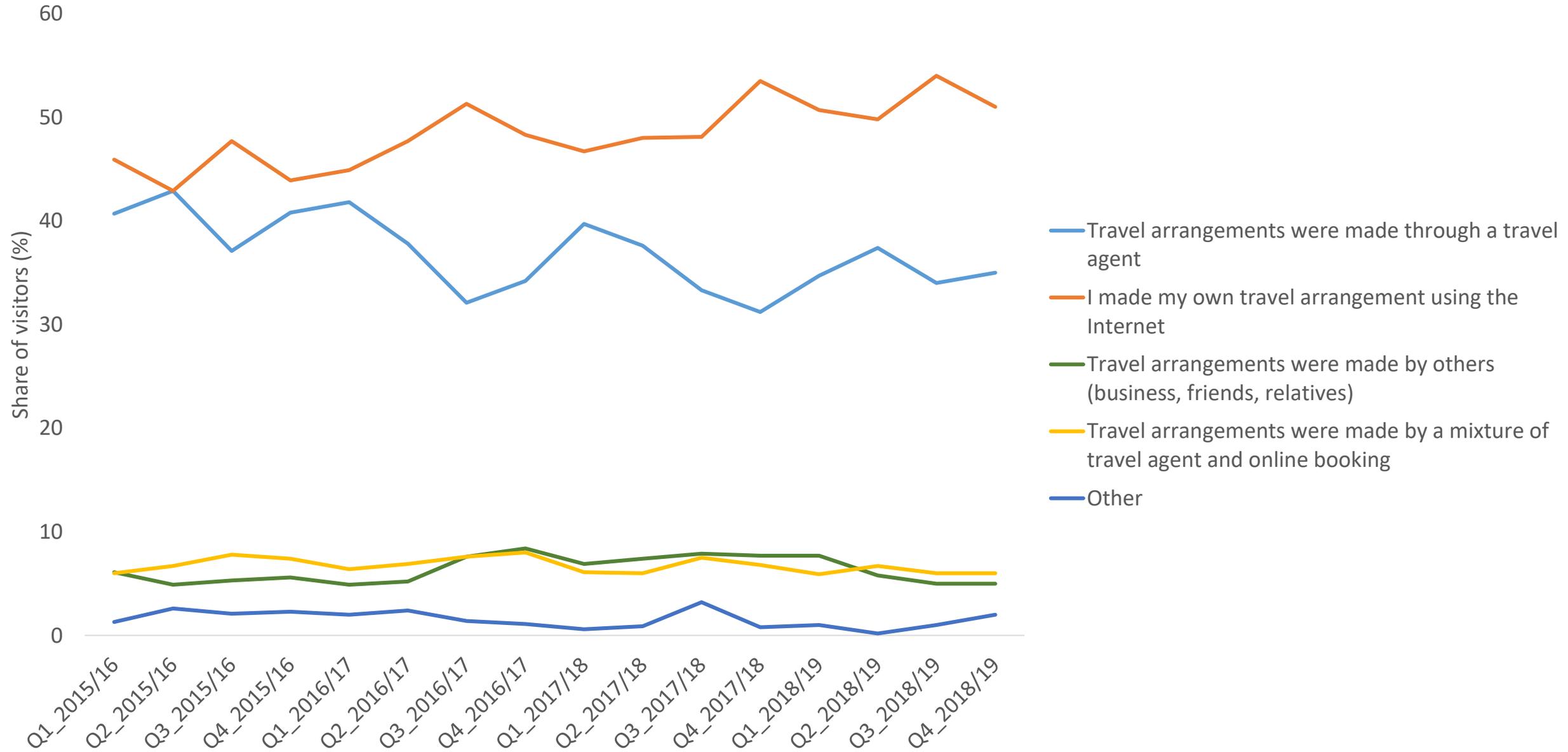


# How did you find out about the Cook Islands?



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

# How did you purchase your travel?



# Per Visit Total Expenditure (Qtr 4 2018/19)

AVERAGE SPEND  
BEFORE VISITING

PER PERSON  
**NZ\$2,092**



**40%** FLOWING BACK



PER PERSON  
**NZ\$837**



PER PERSON PER DAY

**NZ\$259**

PER PERSON PER VISIT

**NZ\$2,069**

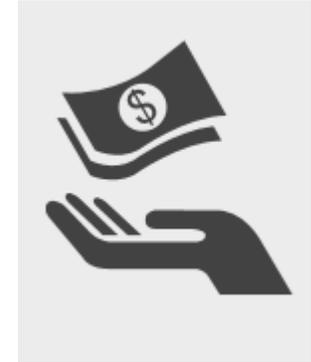
AVERAGE SPEND  
WHILE IN THE COOK  
ISLANDS

PER PERSON  
PER DAY  
**NZ\$154**



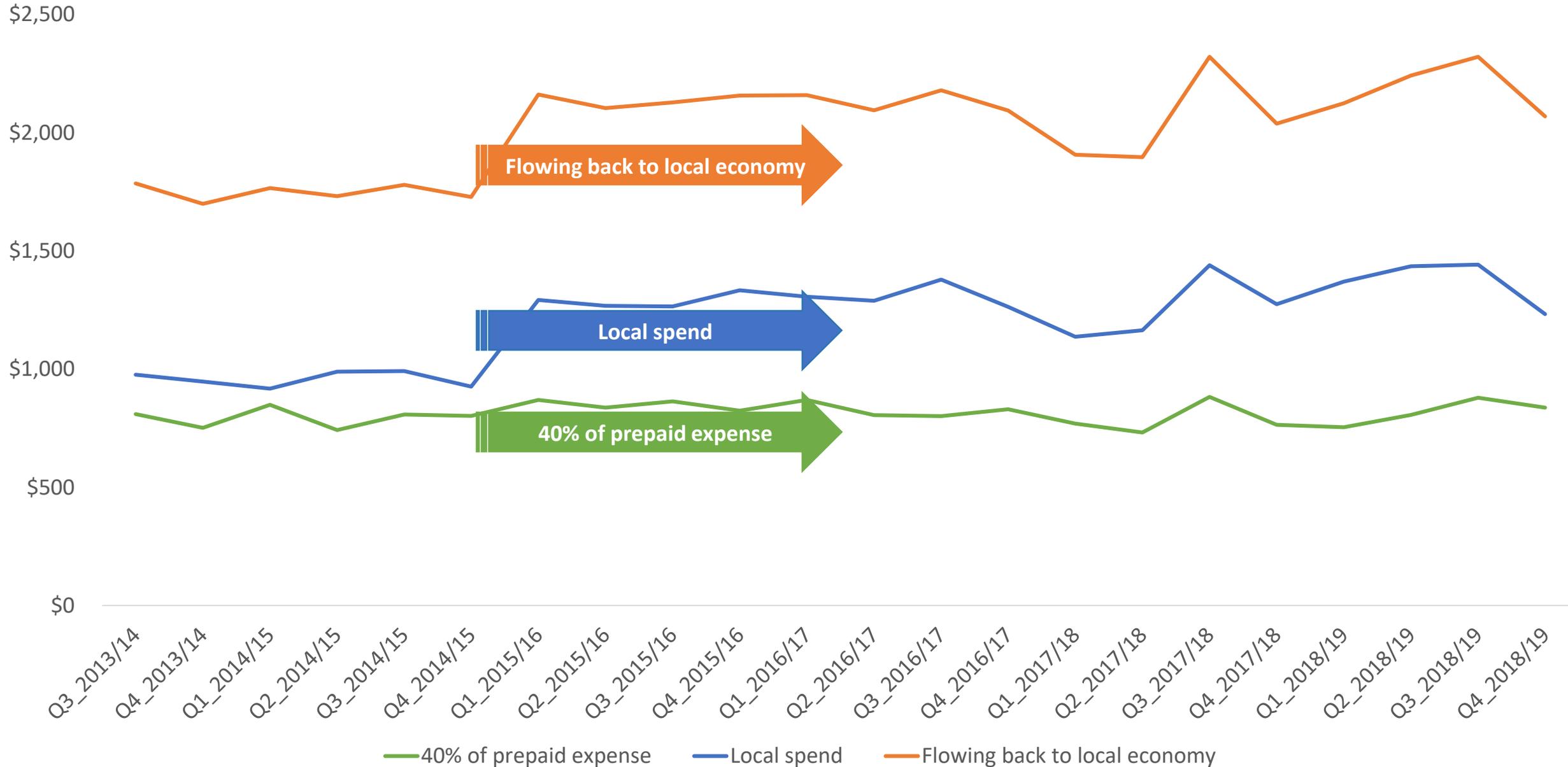
# Local Expenditure Per Person Per Day (Qtr 4 2018/19)

Expenditure Items	Mean (NZ\$)	(% of spend)
Accommodation	68	44
Restaurant, cafes and bar	33	21
Shopping	11	6
Vehicle rental	9	6
Domestic flights	8	5
Activities	8	5
Groceries	7	5
Other	2	1
Petrol	2	1
Internet cost	2	1
Cruising	2	1
Public transportation	1	0

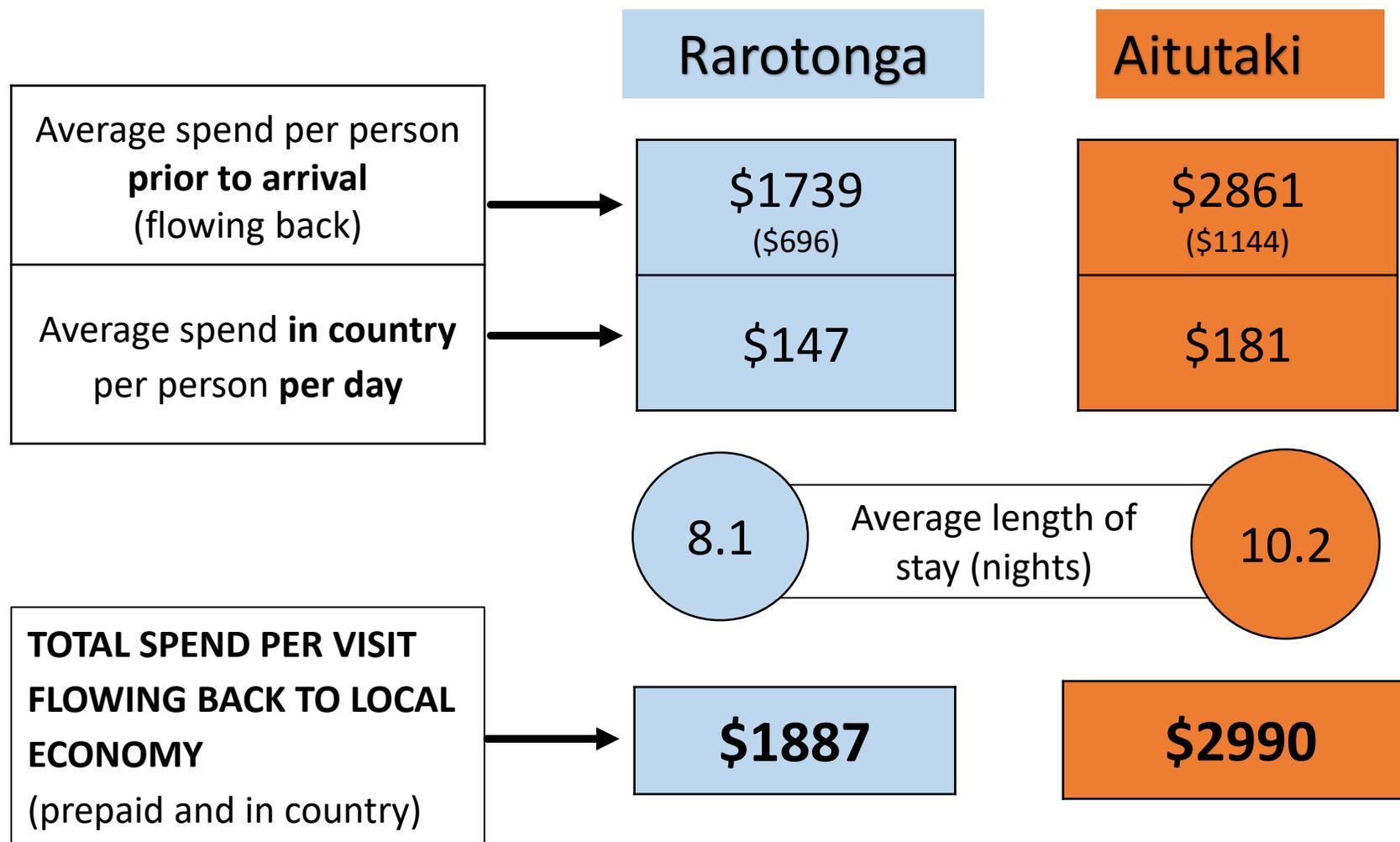


Each visitor spends on average a total of **NZ\$154** per day while in the Cook Islands

# Visitor Spend (time series)



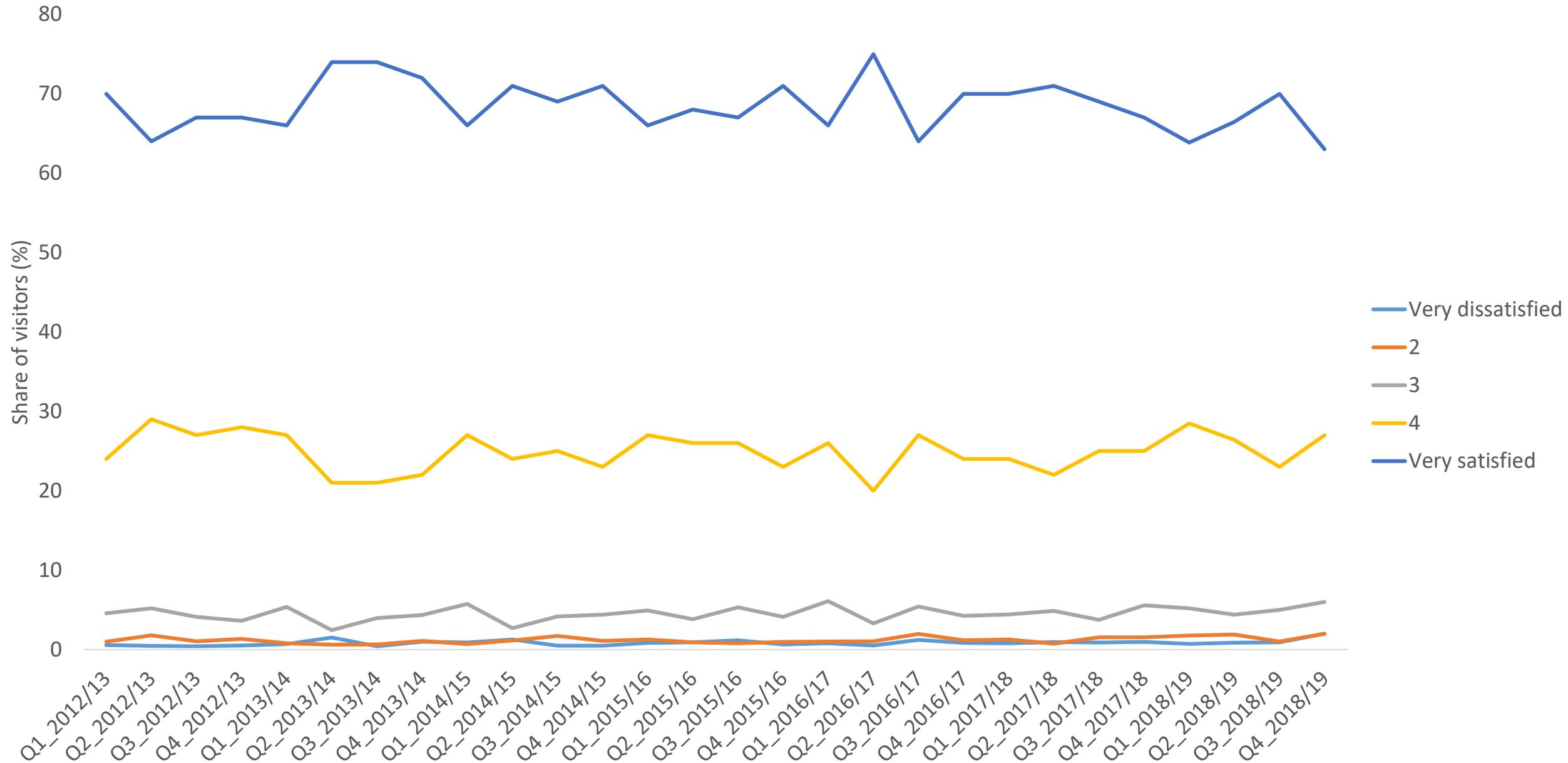
# Expenditure (July 2017 - June 2019)



# Expenditure – Regional Comparison (NZ\$)

	Cook Islands	Samoa	Vanuatu	Niue	Solomon Islands	PNG	Yap
<b>Survey period</b>	Apr to Jun 2019	Jan to Dec 2018	Jan - Dec 2018	Oct 2018 to Mar 2019	Jan - Dec 2018	Jan - Dec 2018	Jan 2015 - Dec 2018
<b>In country spend per person per day</b>	\$154	\$88	\$136	\$99	\$104	\$120	\$163
<b>Total spend per person per person per day</b>	\$259	\$180	\$278	\$163	\$241	\$321	\$325
<b>Total spend per person per visit</b>	\$2,069	\$1,476	\$2,247	\$1,297	\$2,370	\$3,144	\$2,273

# Overall Satisfaction

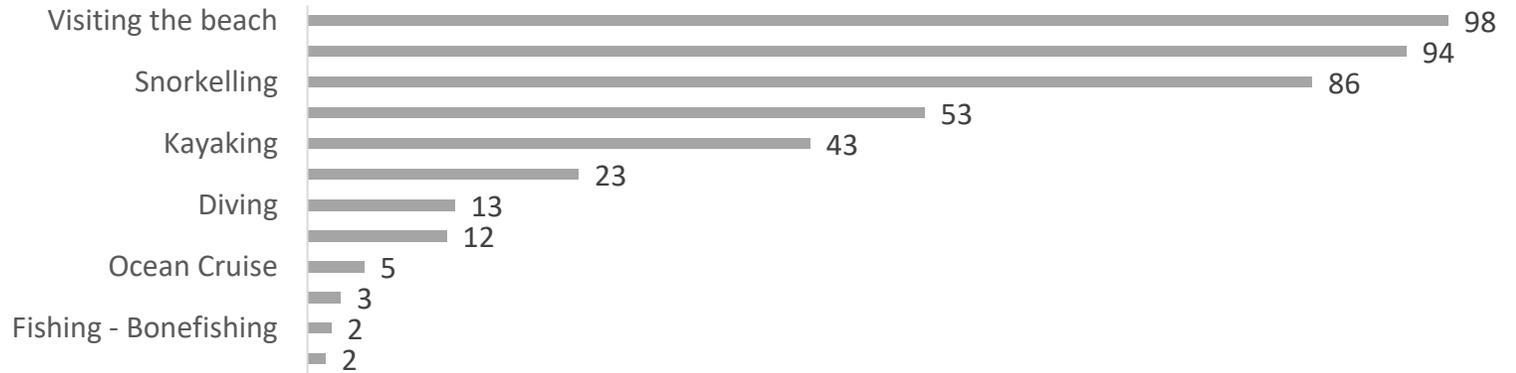


# Overall Satisfaction (Satisfied/Very Satisfied)

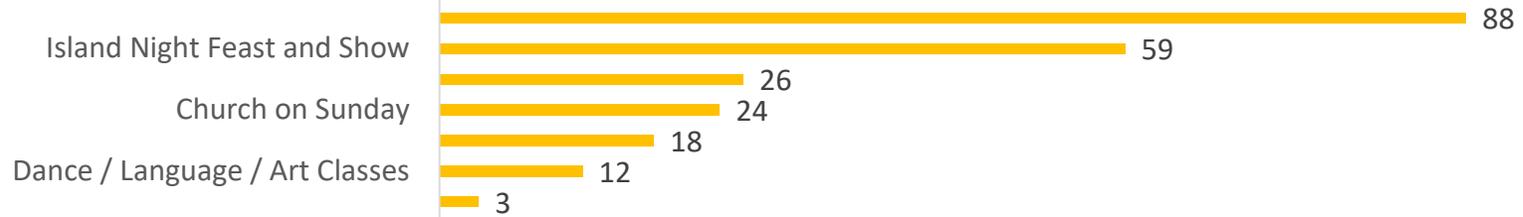
Country/State	Satisfied	V. Satisfied	Total
Cook Islands	23	70	93
Niue	27	66	93
Yap	33	57	90
Samoa	32	54	86
Vanuatu (1 <sup>st</sup> qtr 2019)	34	52	86
PNG			73
Solomon Is	39	28	67

# Degree of Participation in Activities (Qtr 4 2018/19)

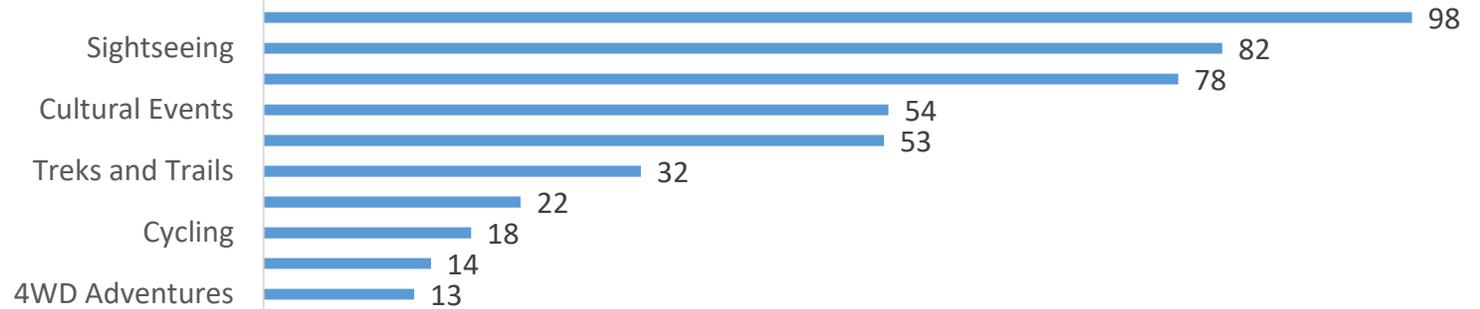
## WATER-BASED ACTIVITIES



## CULTURAL INTERACTION



## LAND-BASED ACTIVITIES



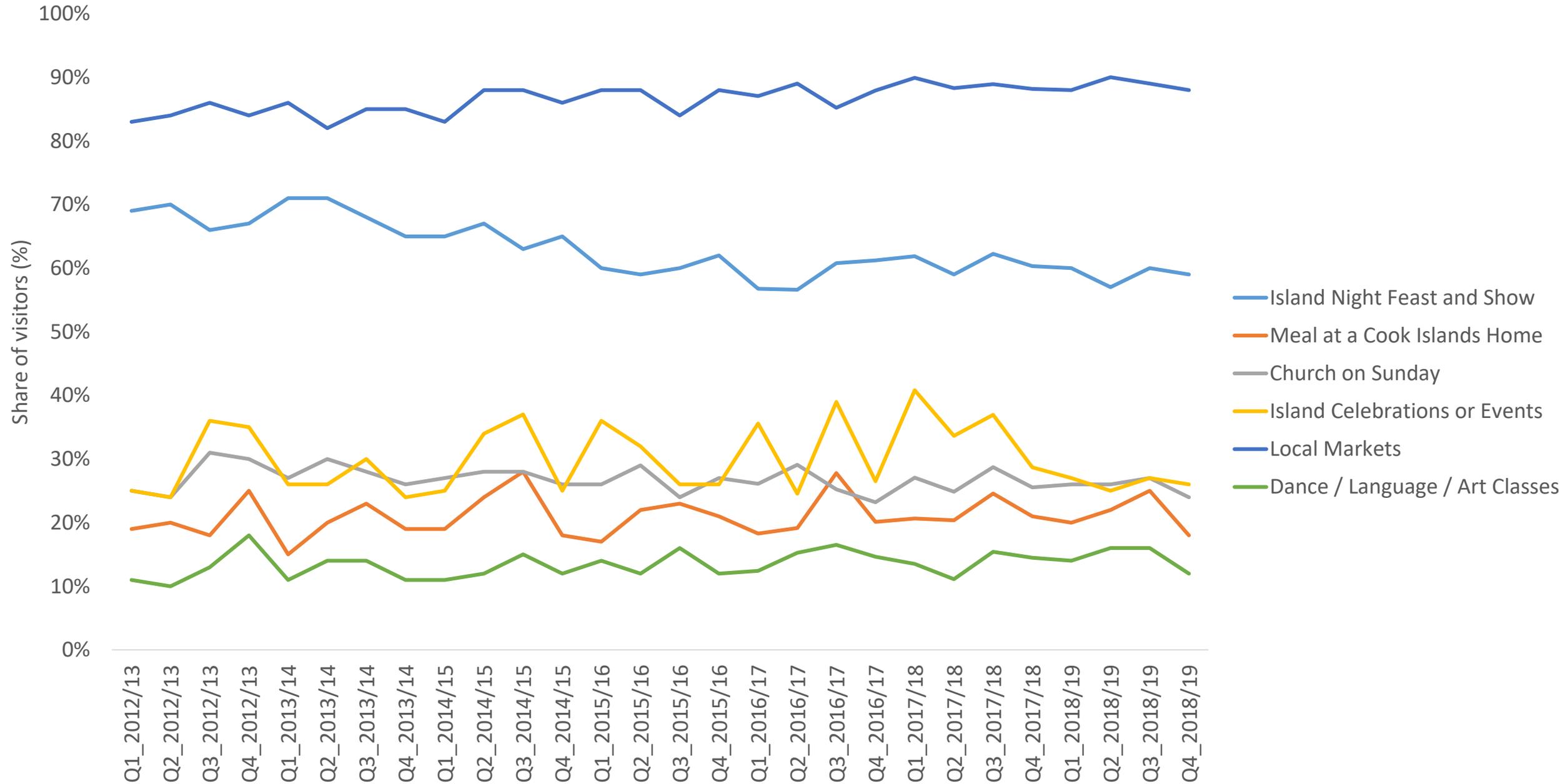
## SHOPPING



Share of Visitors (%)

0 10 20 30 40 50 60 70 80 90 100

# Degree of Participation in Culturally Interactive Activities



# Satisfaction with Activities (Qtr 4 2018/19)

## WATER-BASED ACTIVITIES

4.3

## CULTURAL INTERACTION

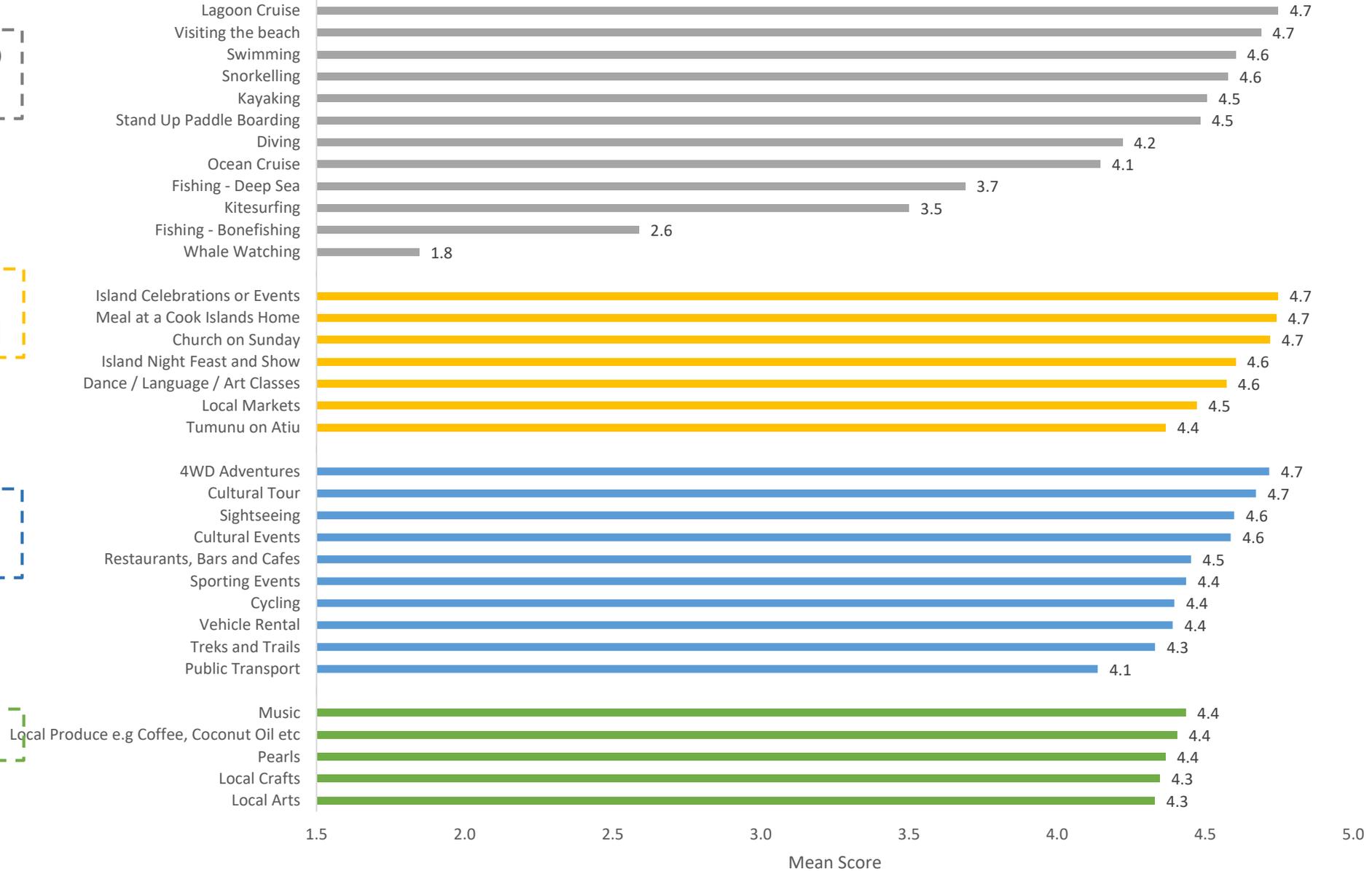
4.6

## LAND-BASED ACTIVITIES

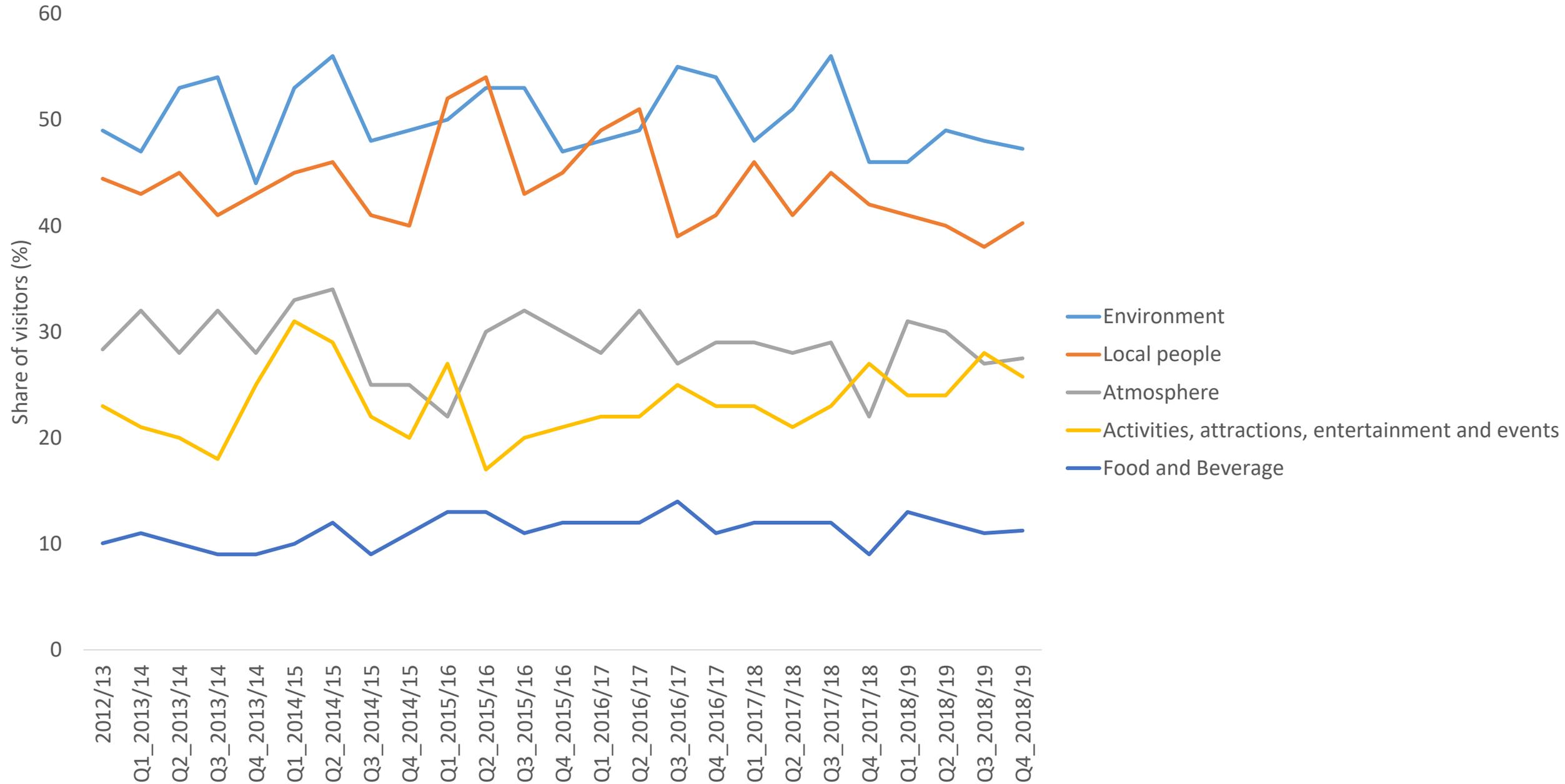
4.5

## SHOPPING

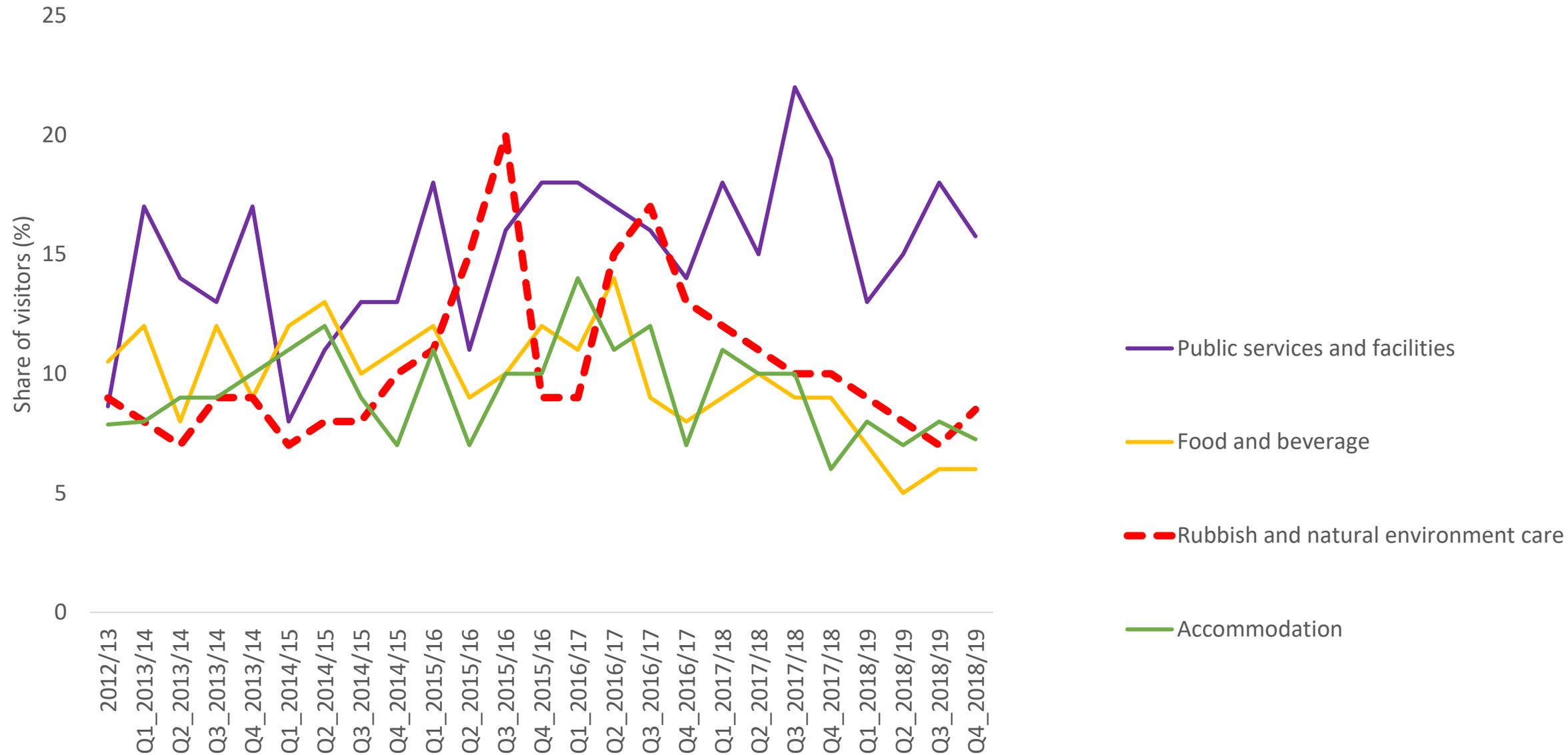
4.4



# Most Appealing Aspects of Visit



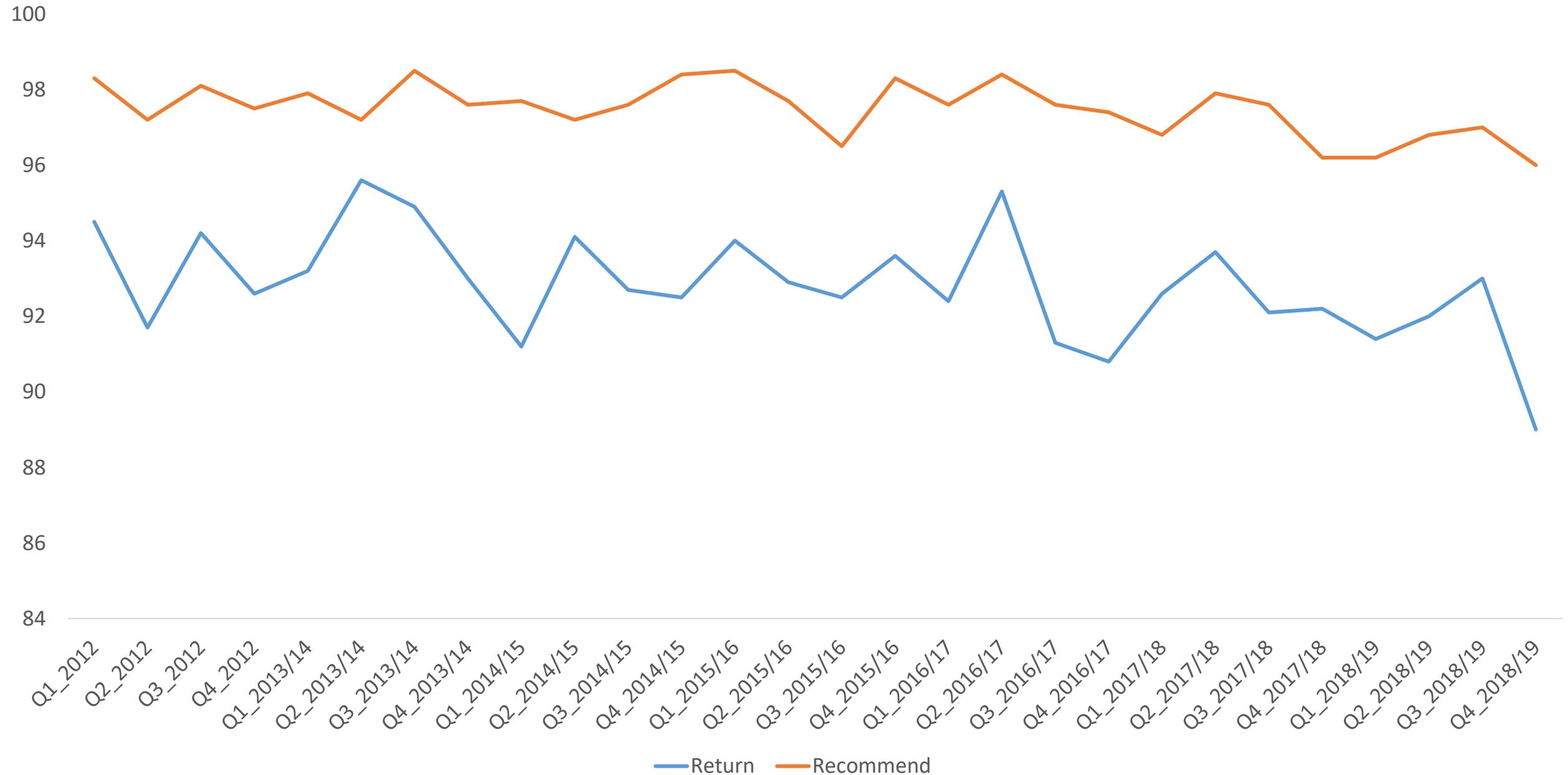
# Least Appealing Aspects of Visit



# Least Appealing - Environmental Quality

Country	% Visitors
Yap	3
Niue	4
Cook Is.	8
Samoa	11
Vanuatu	15
PNG	18
Solomon Is	35

# Return and Recommend





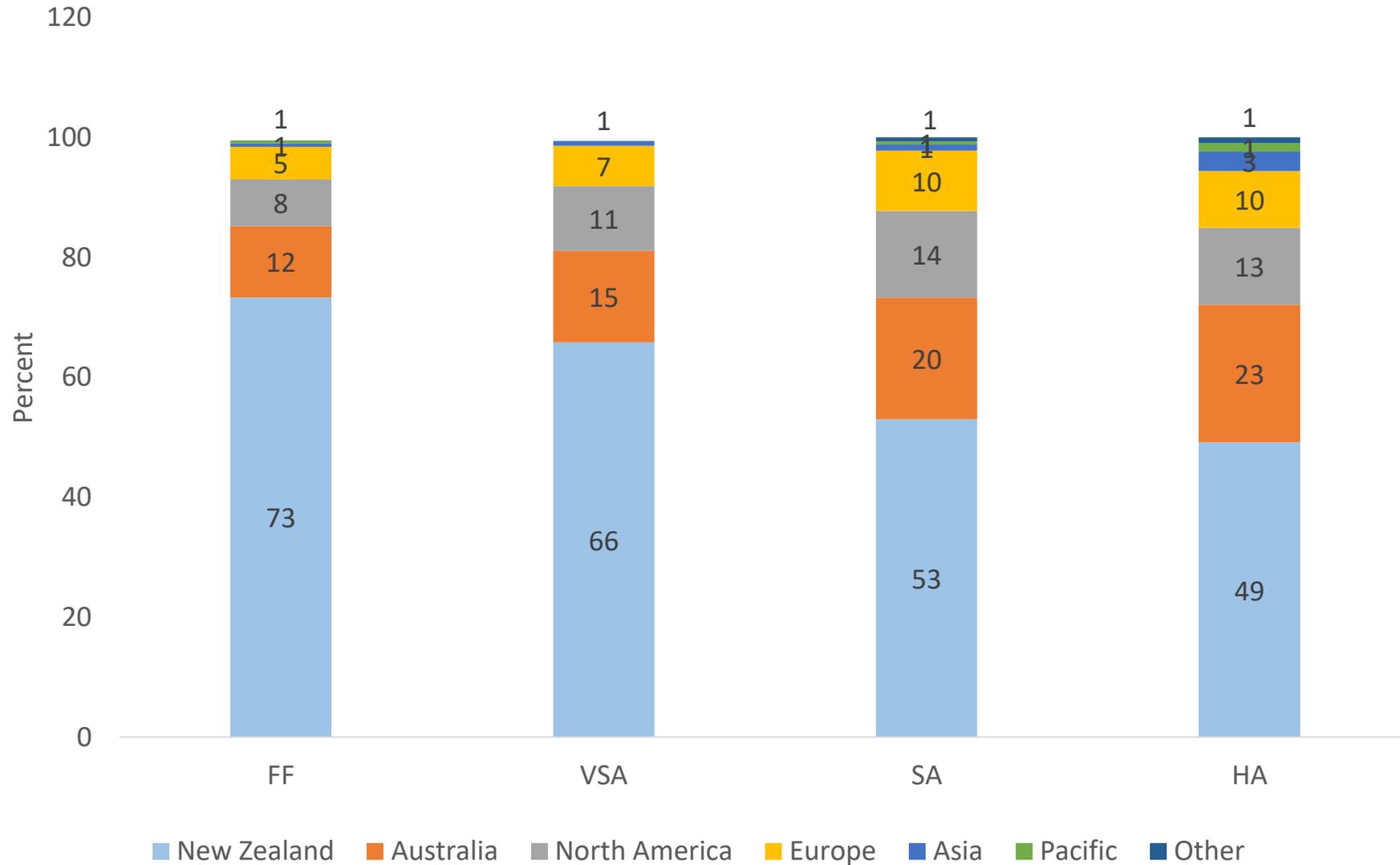
# Cook Islands Visitor Survey

Soft Adventure Market Segmentation - Visitor Characteristics  
(2016-2019)

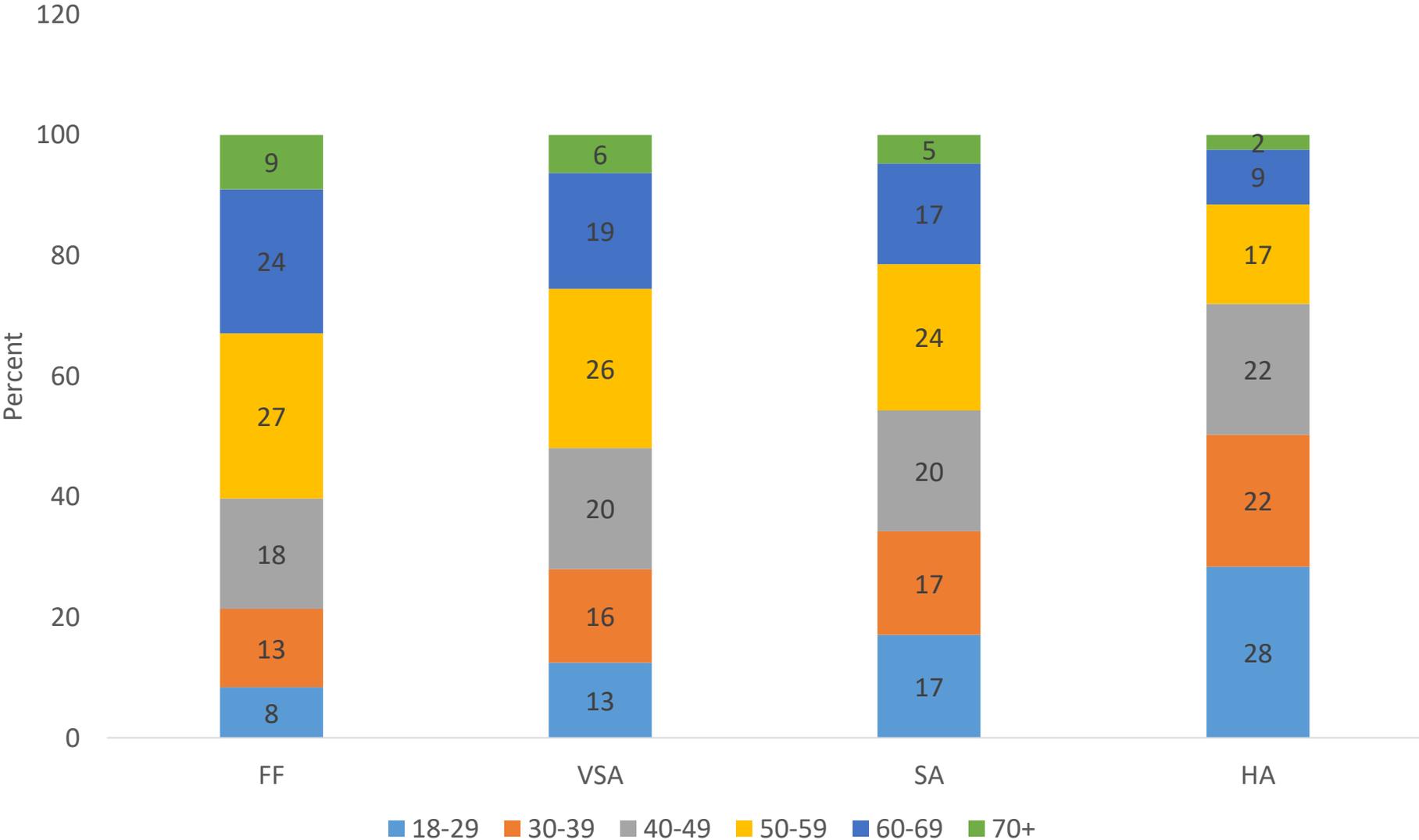
# Soft adventure segmentation (2016-2019)

	<b>Number of activities</b>	<b>% of Visitors</b>
<b>Fly and flop (FF)</b>	0 to 1	36%
<b>Very soft adventure (VSA)</b>	2-3	37%
<b>Soft adventure (SA)</b>	4-6	22%
<b>Hard adventure (HA)</b>	7 +	5%

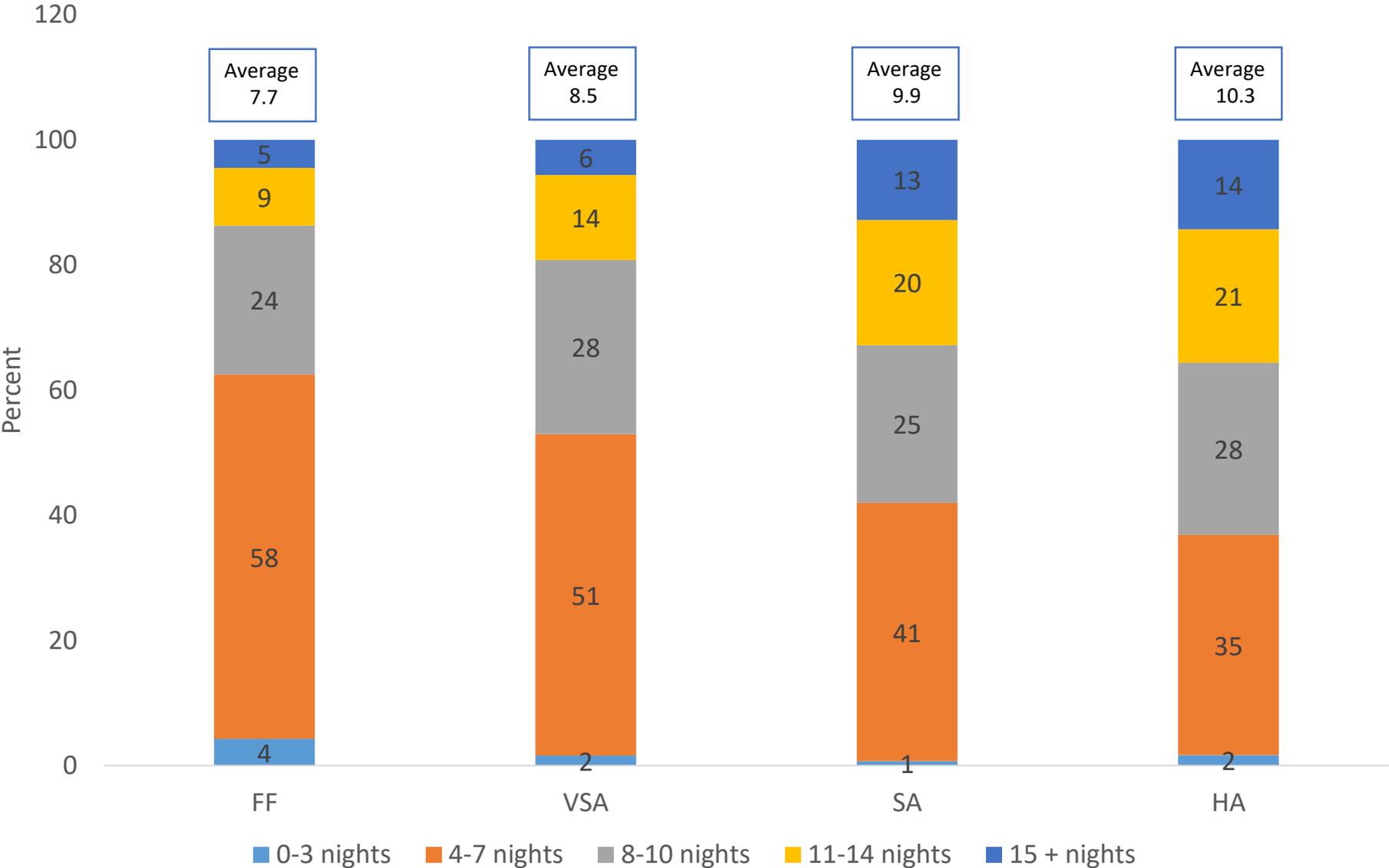
# Country of origin (2016-2019)



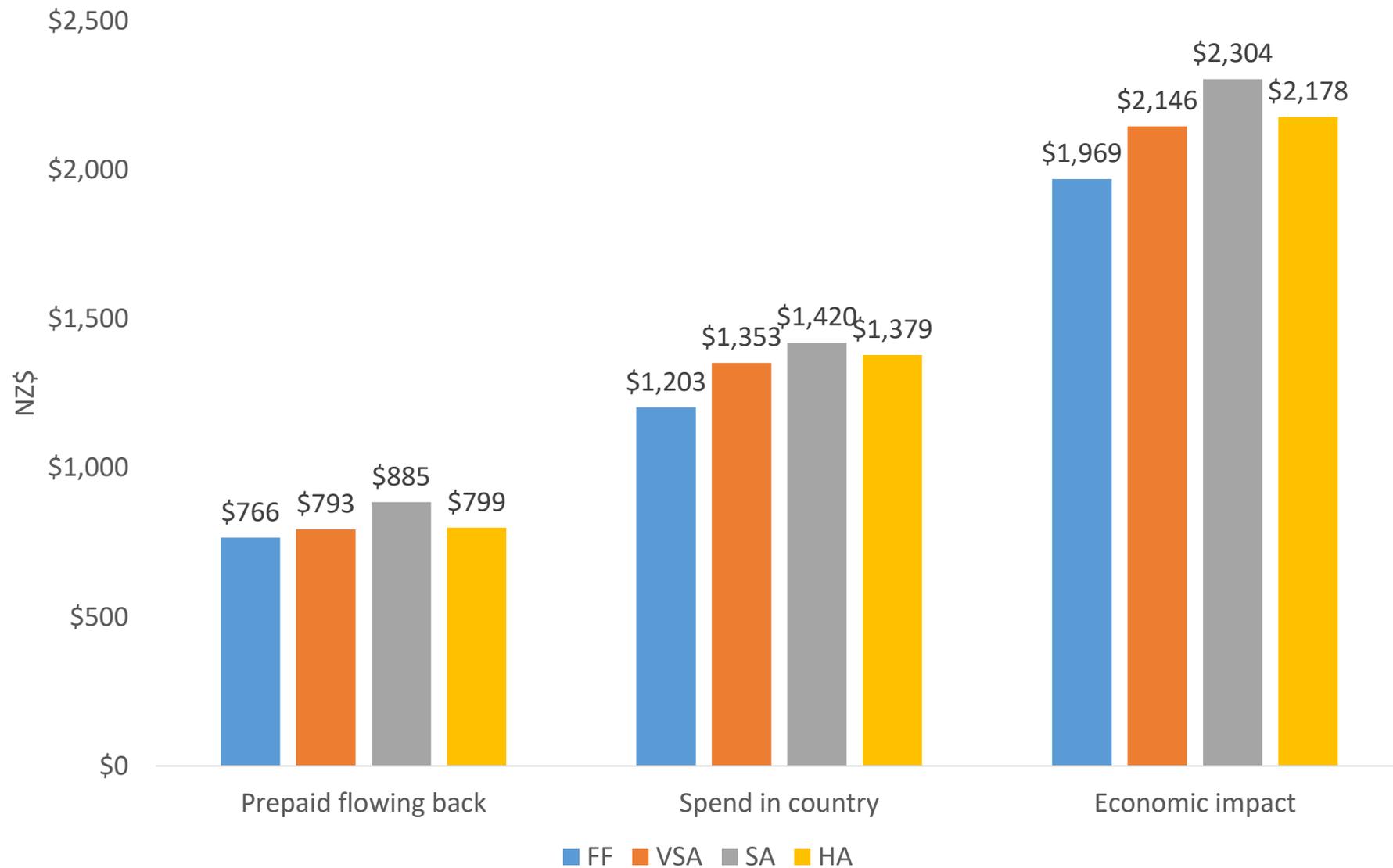
# Distribution of age (2016-2019)



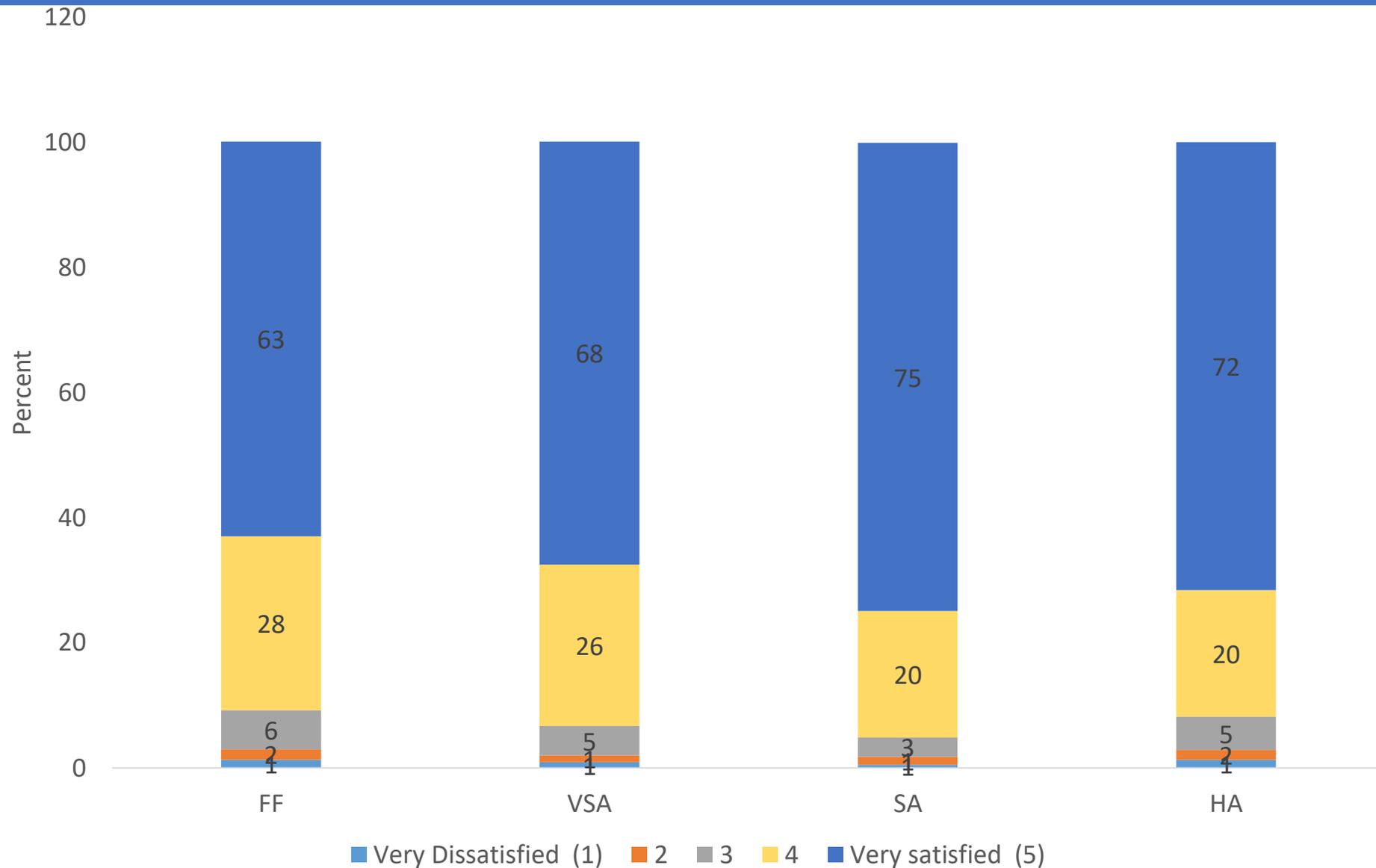
# Length of stay (nights) (2016-2019)



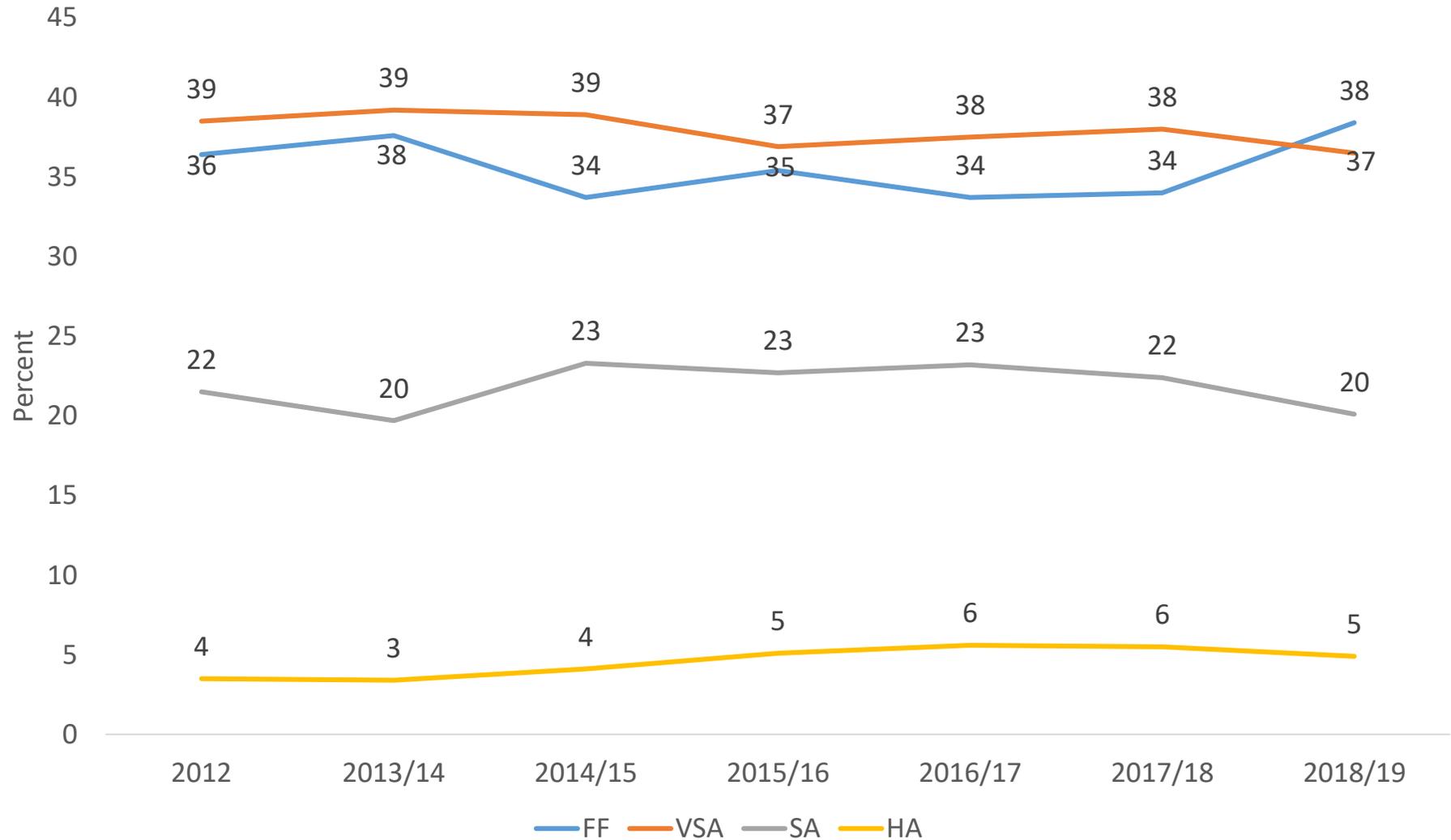
# Soft adventure visitors spending per visit (2016-2019)



# Overall satisfaction (2016-2019)



# 2012 - 2019 trends





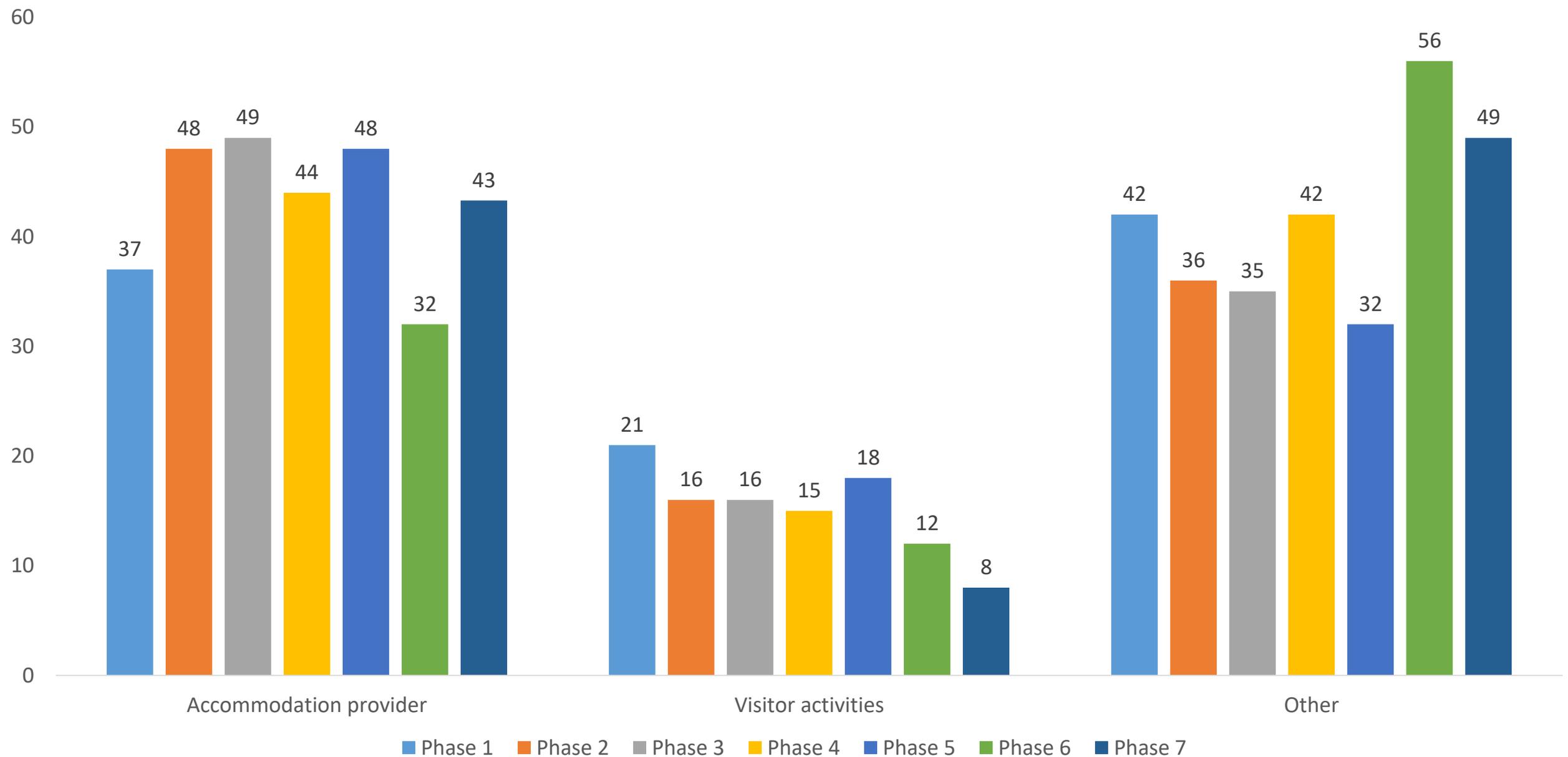
# Business Confidence Index Survey



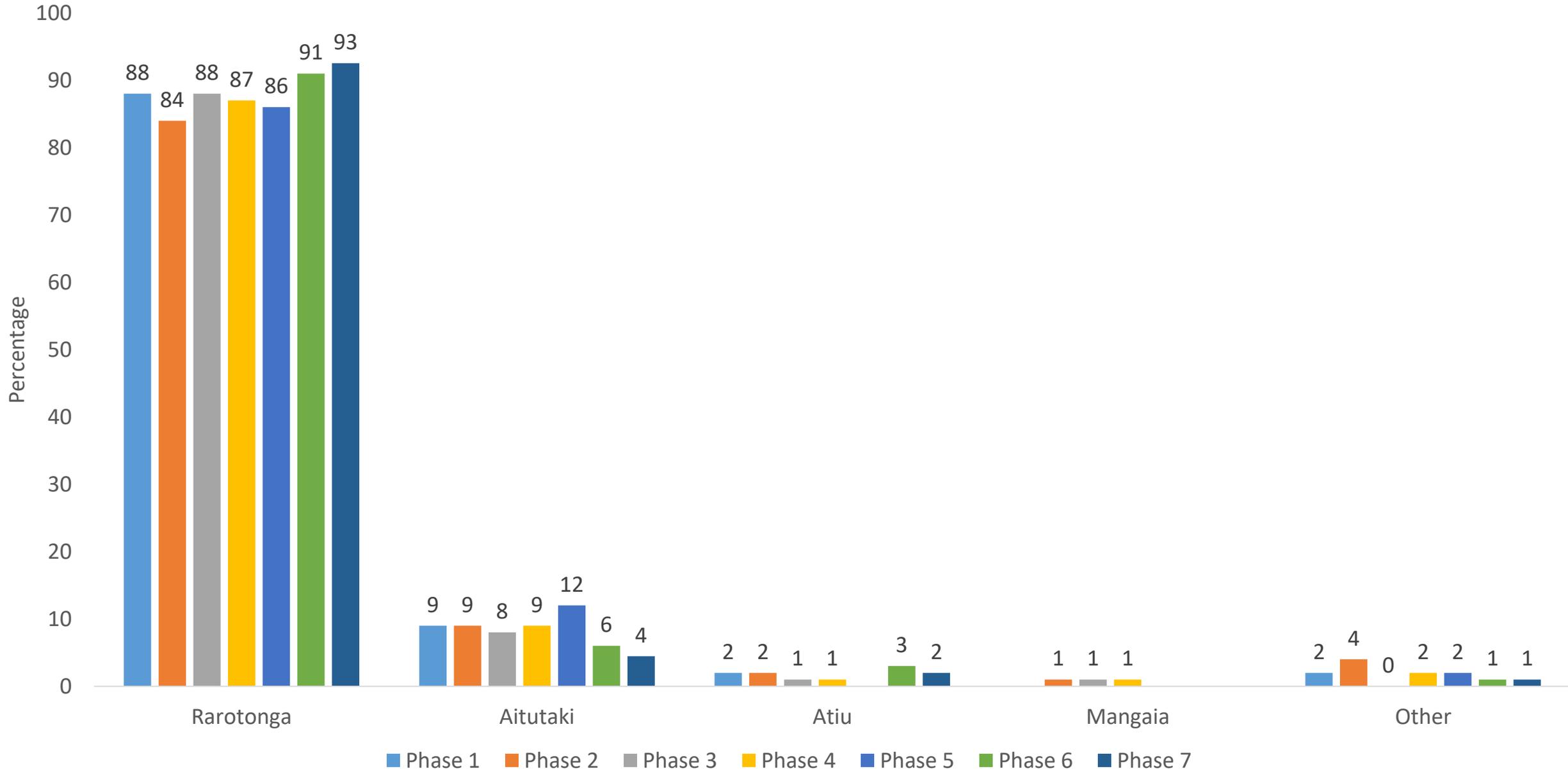
# Respondents across seven phases

	Phase 1 (round 1 of 2016)	Phase 2 (round 2 of 2016)	Phase 3 (round 1 of 2017)	Phase 4 (round 2 of 2017)	Phase 5 (round 1 of 2018)	Phase 6 (round 2 of 2018)	Phase 7 (round 1 of 2019)
Number of responses	128	124	97	106	84	113	68
Conversion rate	41%	40%	31%	34%	27%	36%	22%
Had participated the survey previously		37%	58%	57%	58%	52%	68%

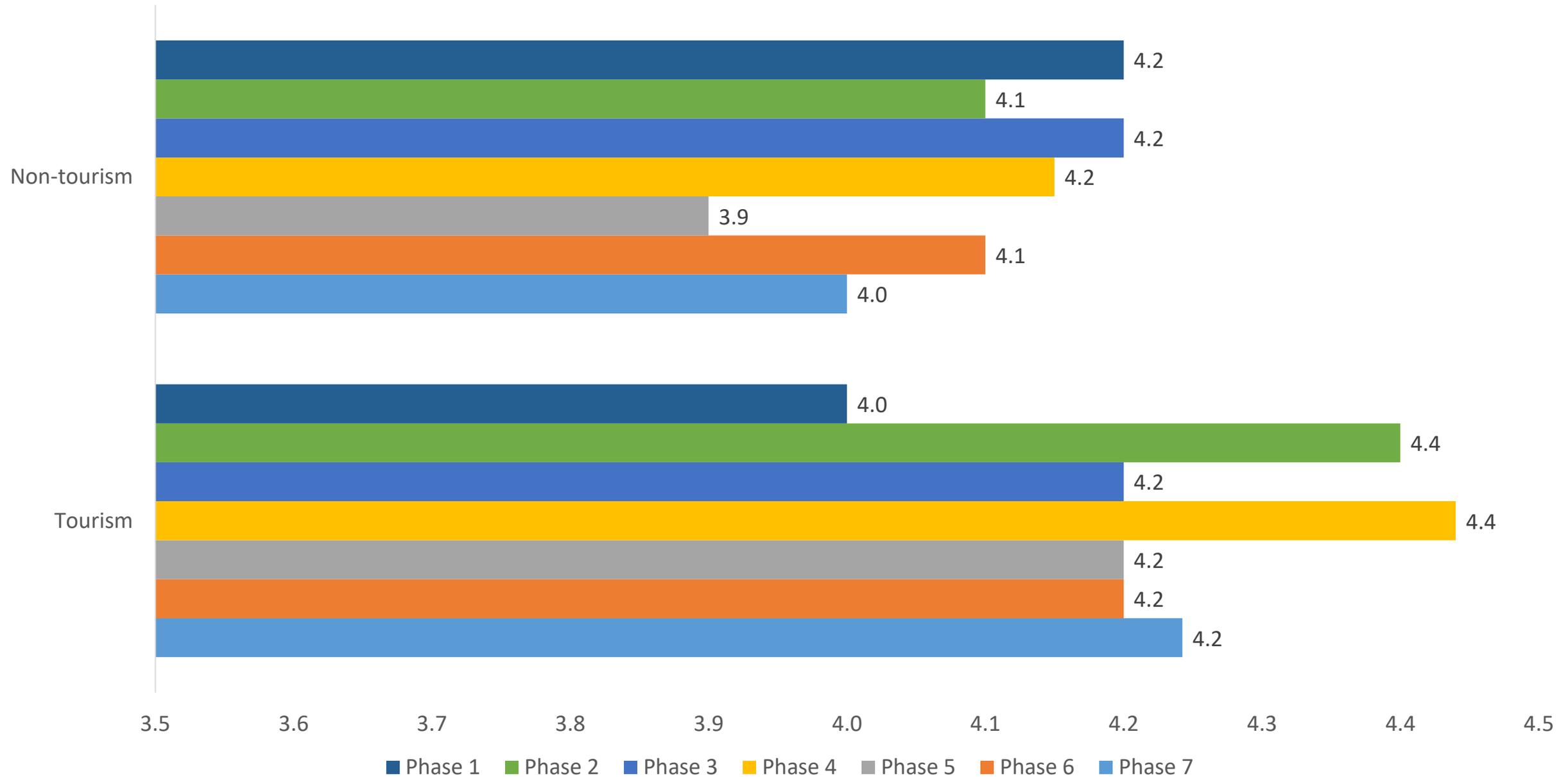
# What is the primary focus of your business?



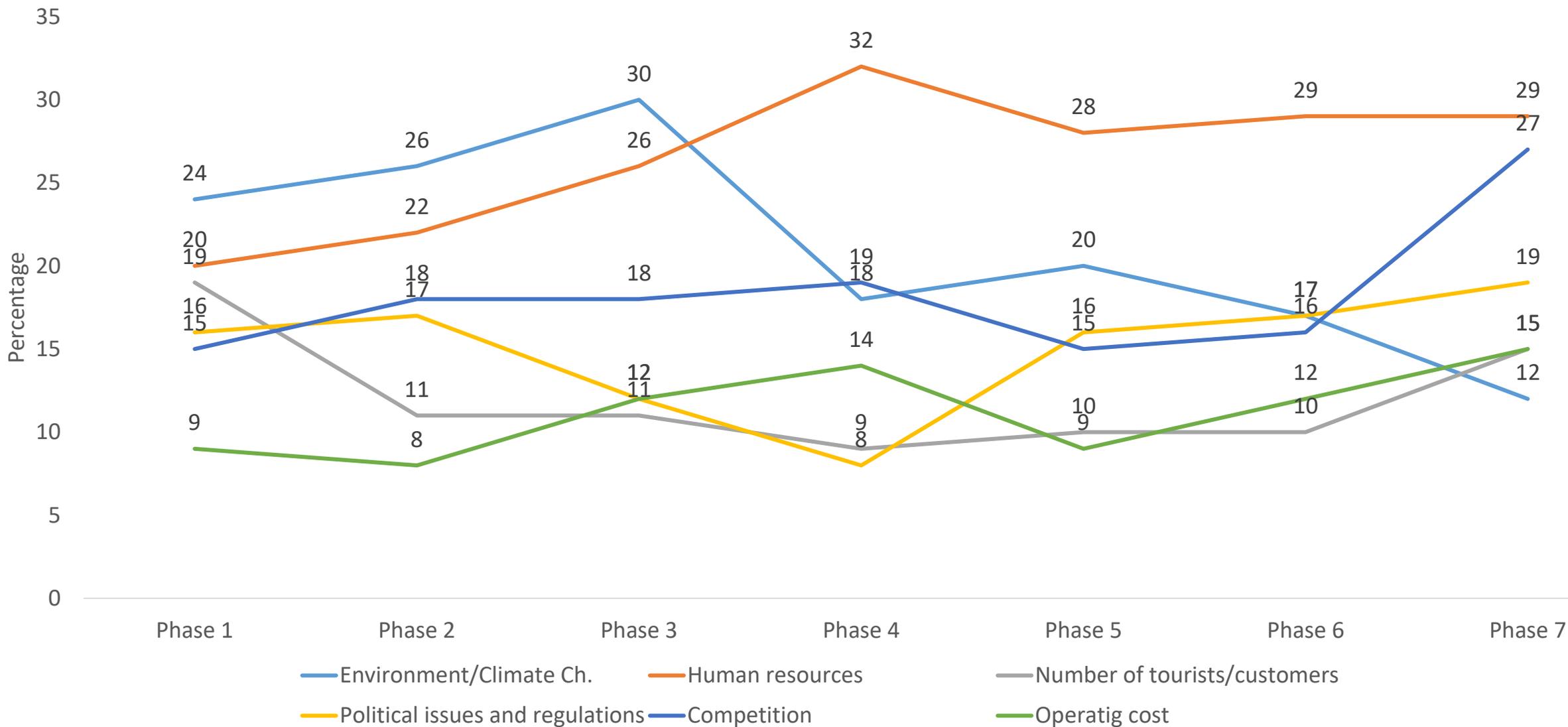
# Location of primary business



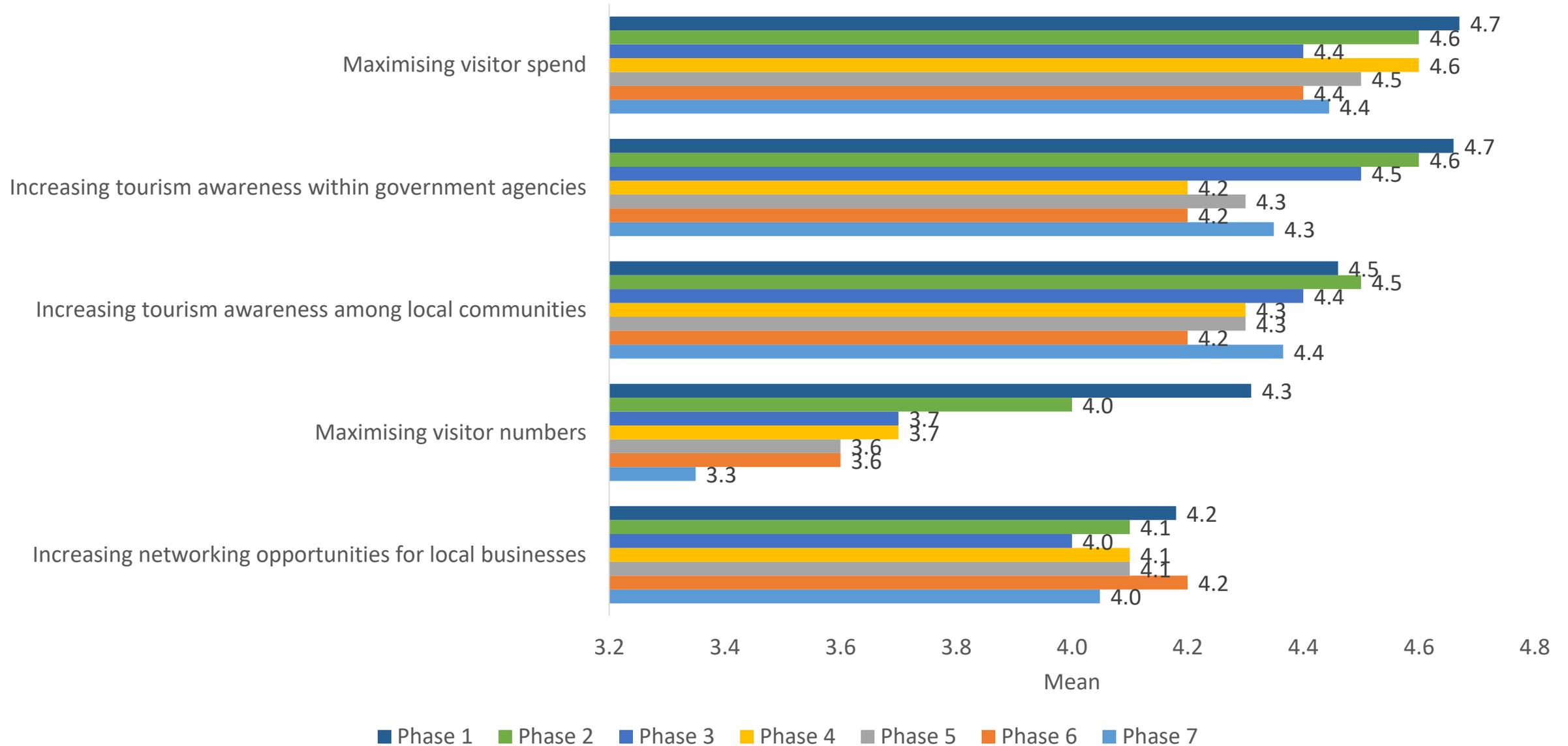
# I am confident my business will do well in the coming year



# The major challenges in next five years?



# How important are the following to the Cook Islands?





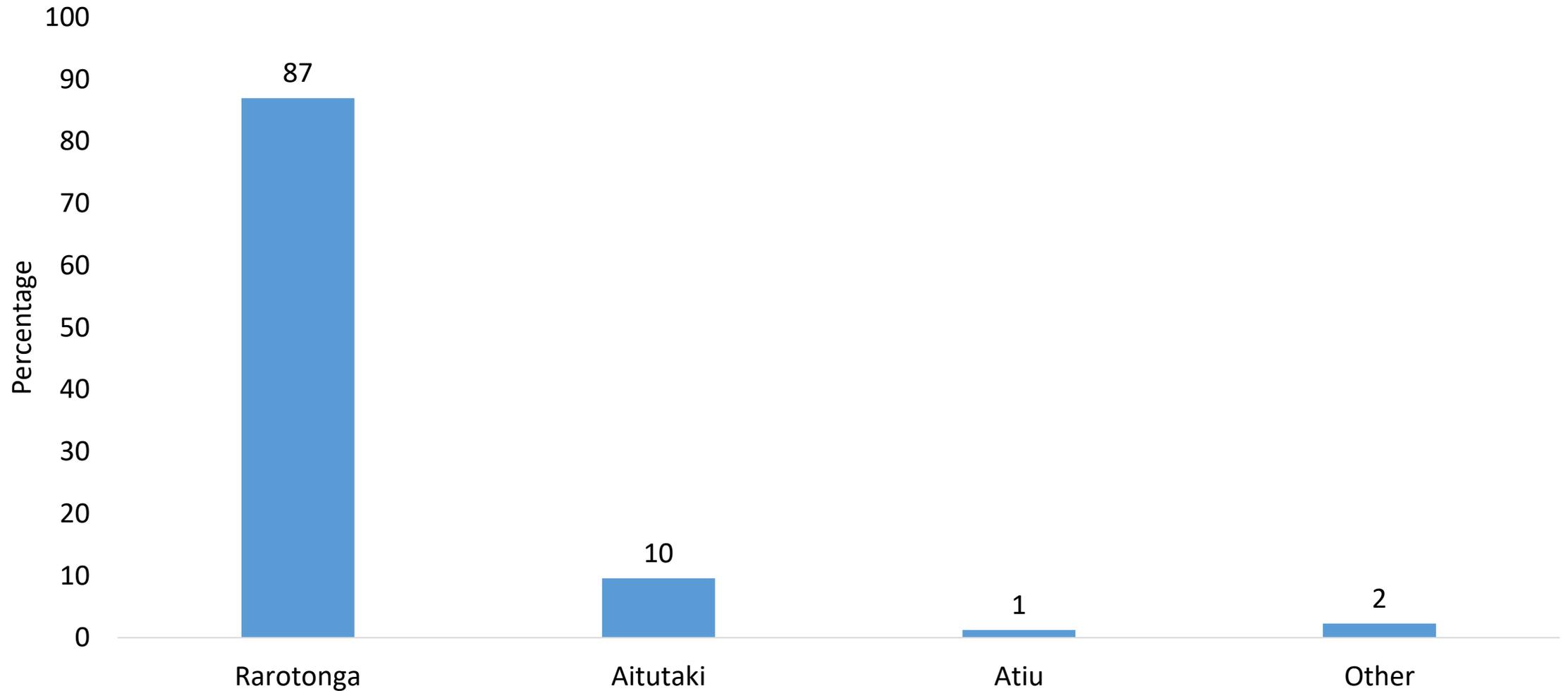
# Cook Islands Community Survey 2: Tourism Attitudes/Awareness



# Approach

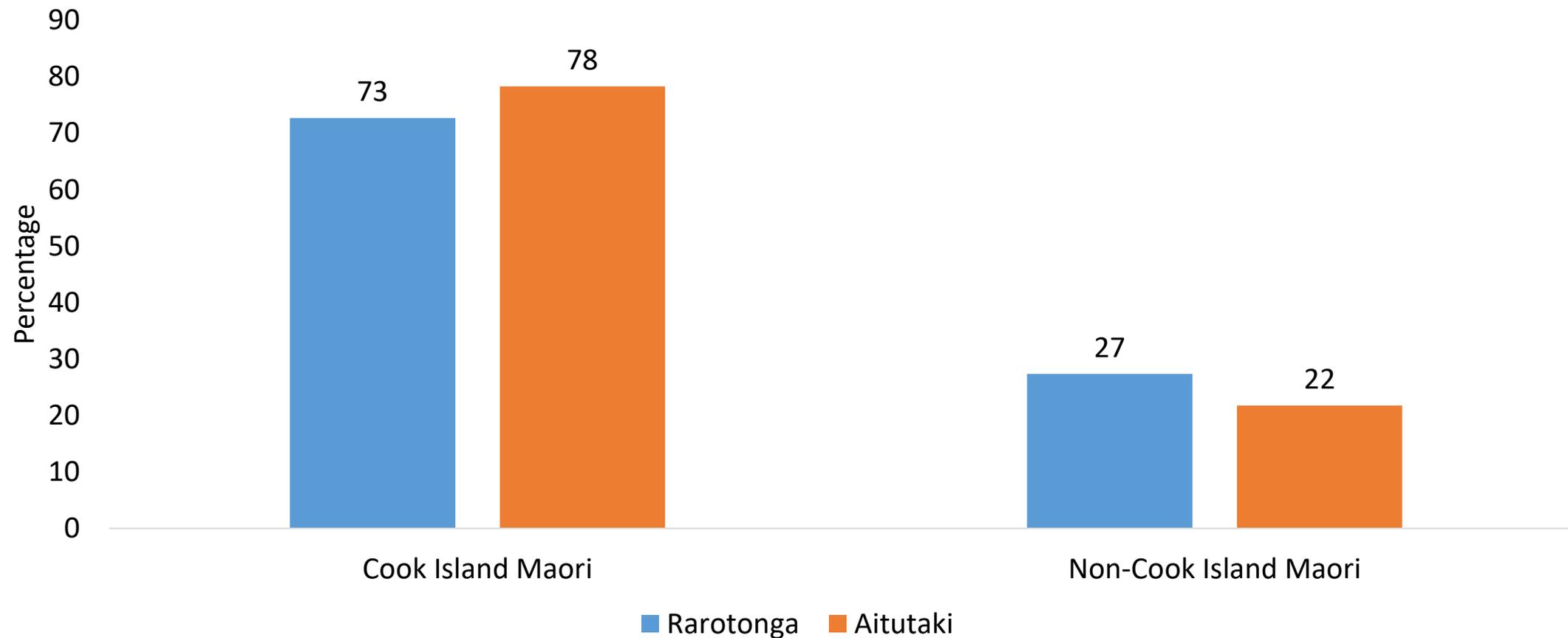
- Online data collection was run with the support of Cook islands Tourism and Telecommunications provider Bluesky. The survey ran from 9 August to 31 October 2019. 975 responses were collected. Based on the total population aged over 15 (2016 census) of 13,138 the sample size is estimated to be approximately 7% (NB for ethical reasons the survey only targeted those aged 18 and over).
- The data is analysed and compared with a focus on the following variables: (1) Cook Island Maori and Non-Cook Island Maori; (2) Age groups; (3) Island of residence (Rarotonga and Aitutaki); and (4) employment type (tourism sector and non-tourism sector).

# Where do you live in the Cook Islands?

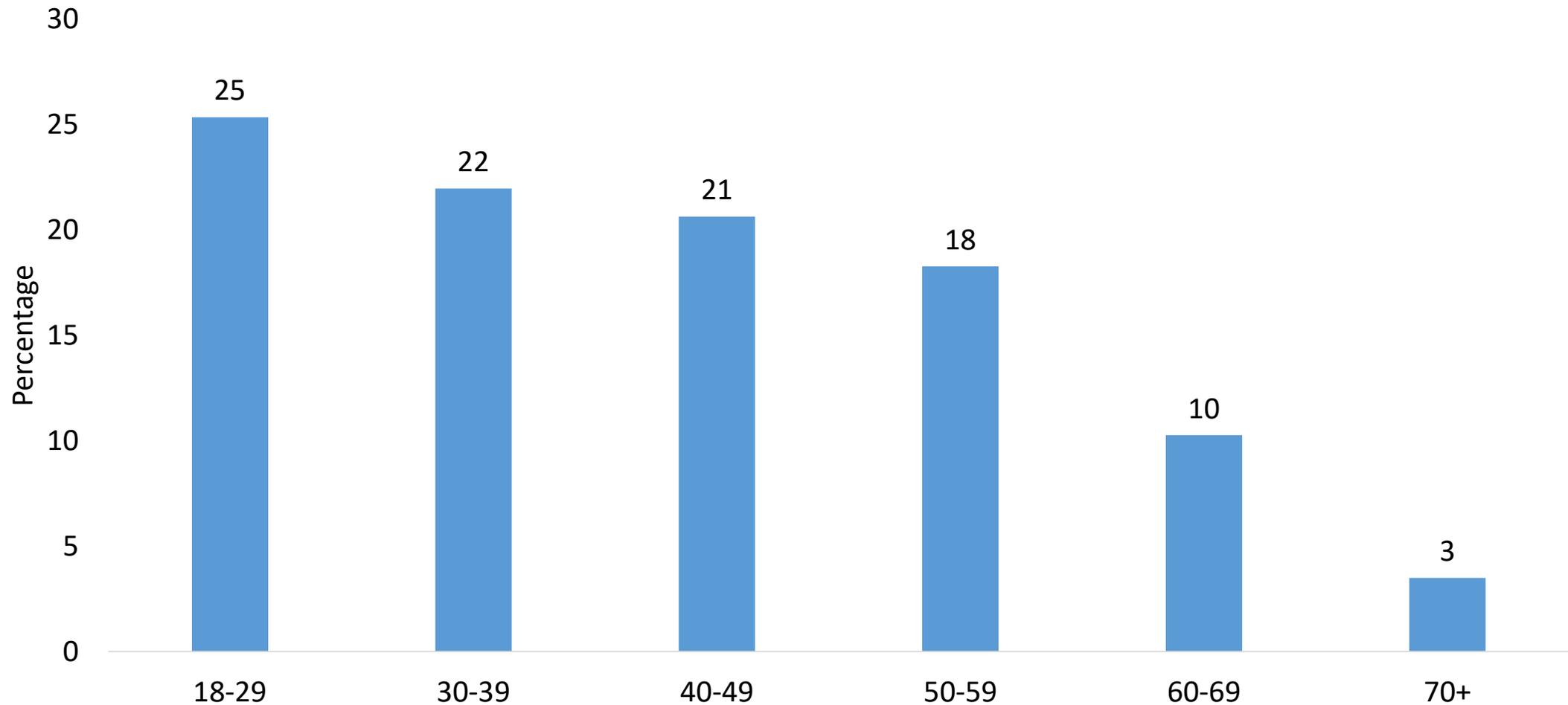


# Which of the following best describes you?

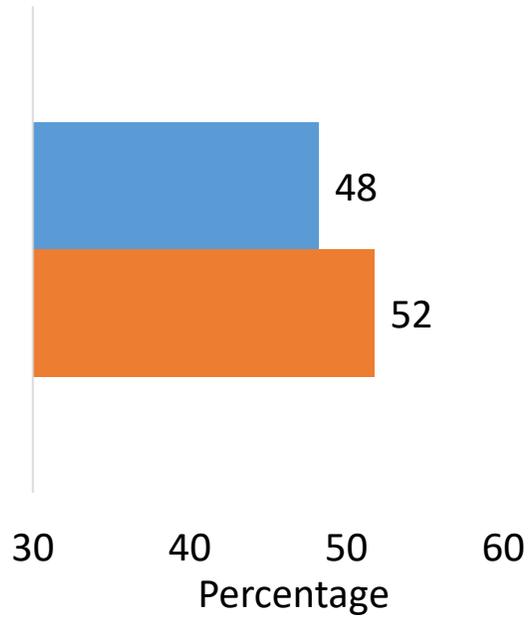
Rarotonga / Aitutaki by CIM/Non CIM



# Which age group are you in?



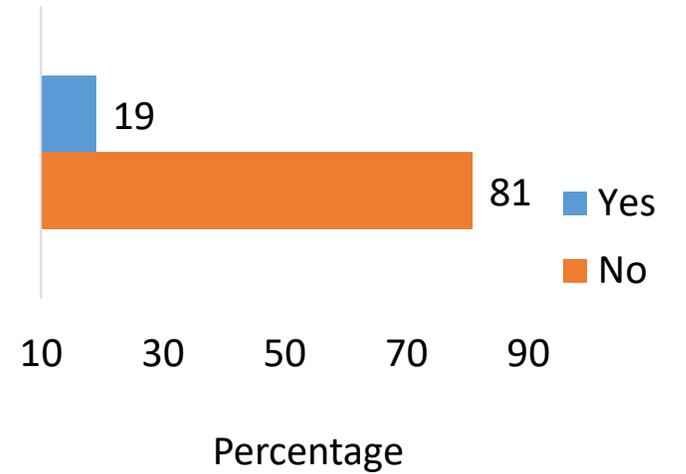
**Do you work in or own a business in the tourism sector?**



■ Yes  
■ No

If responded NO

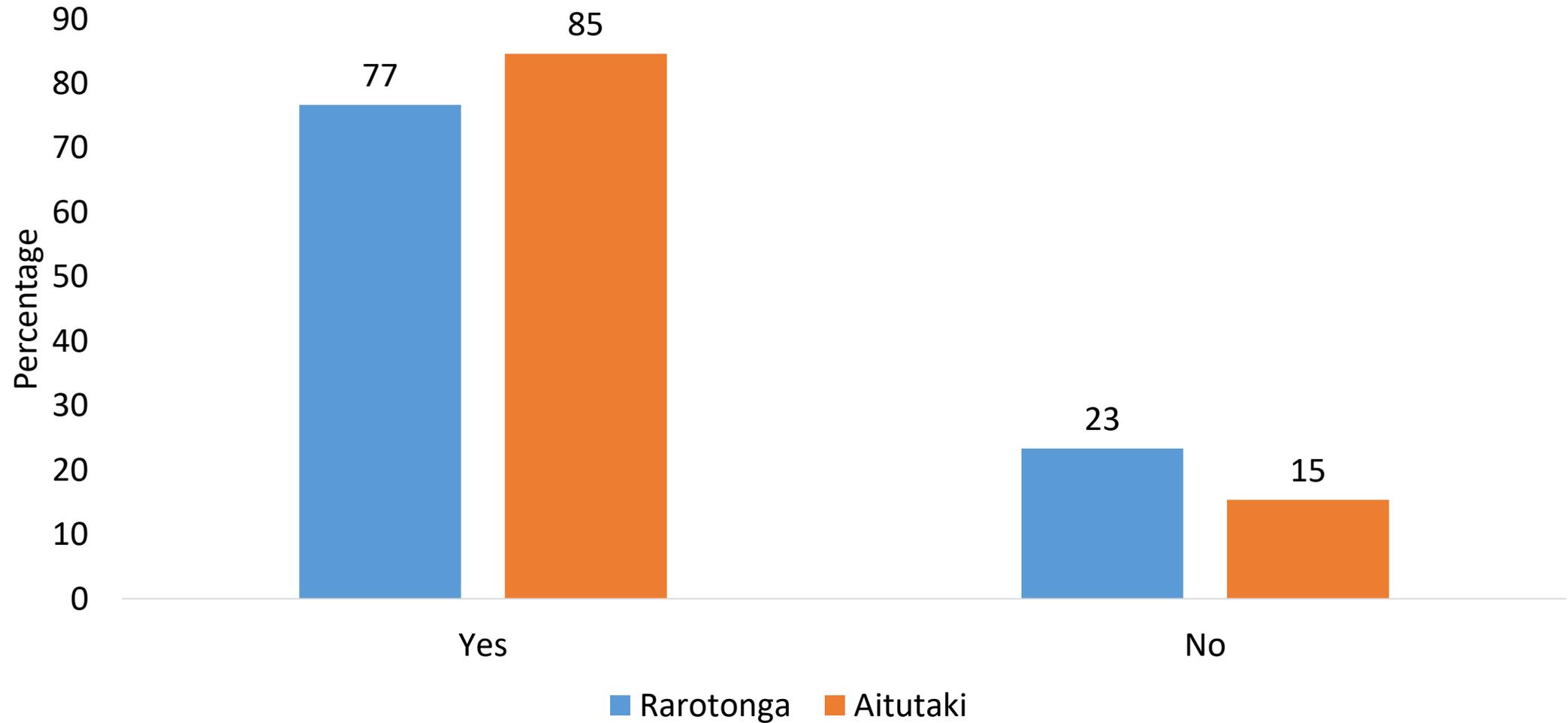
**Do you get any income from tourism?**



■ Yes  
■ No

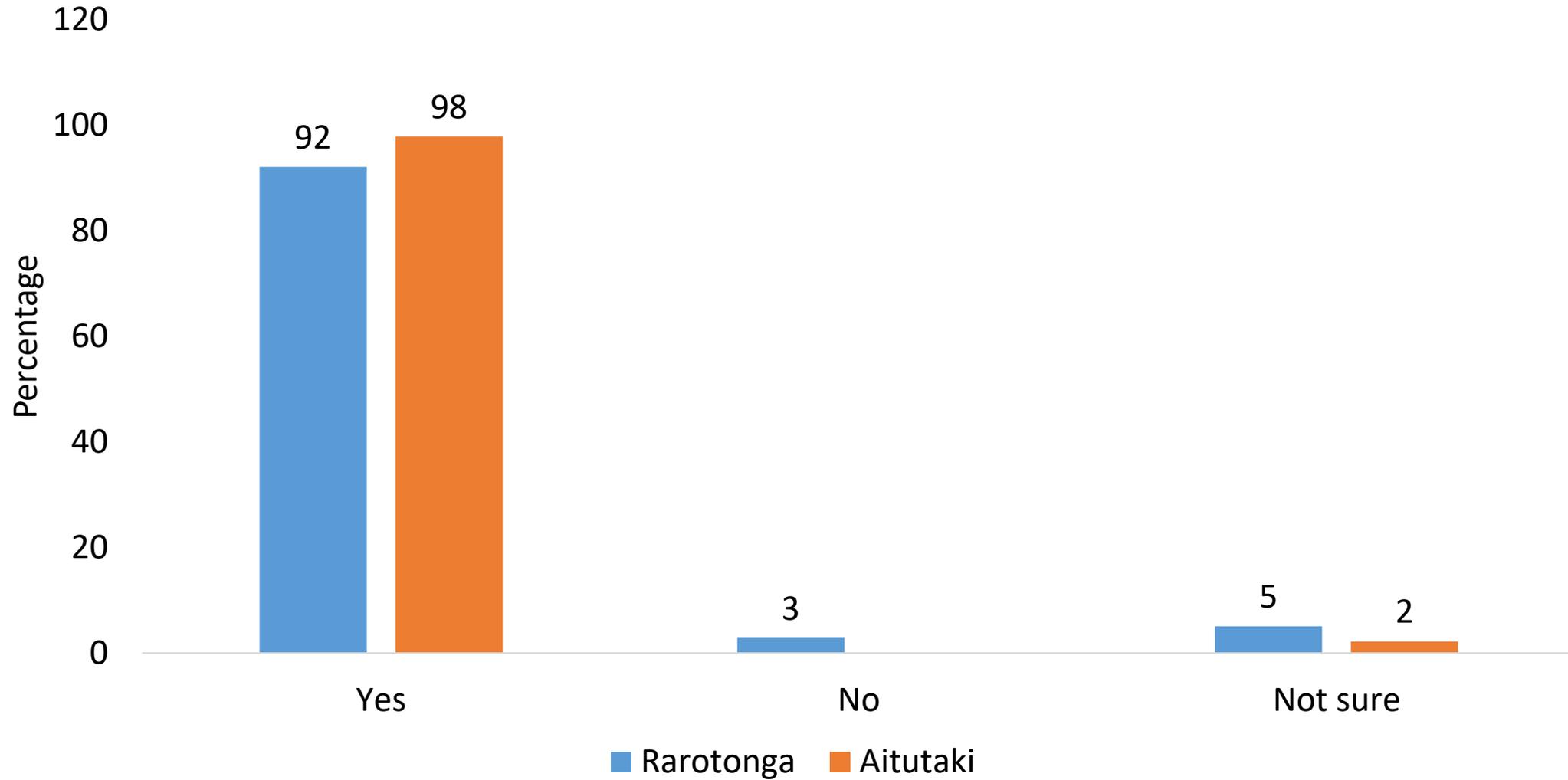
# Do you have family members who work in the tourism industry?

Rarotonga / Aitutaki

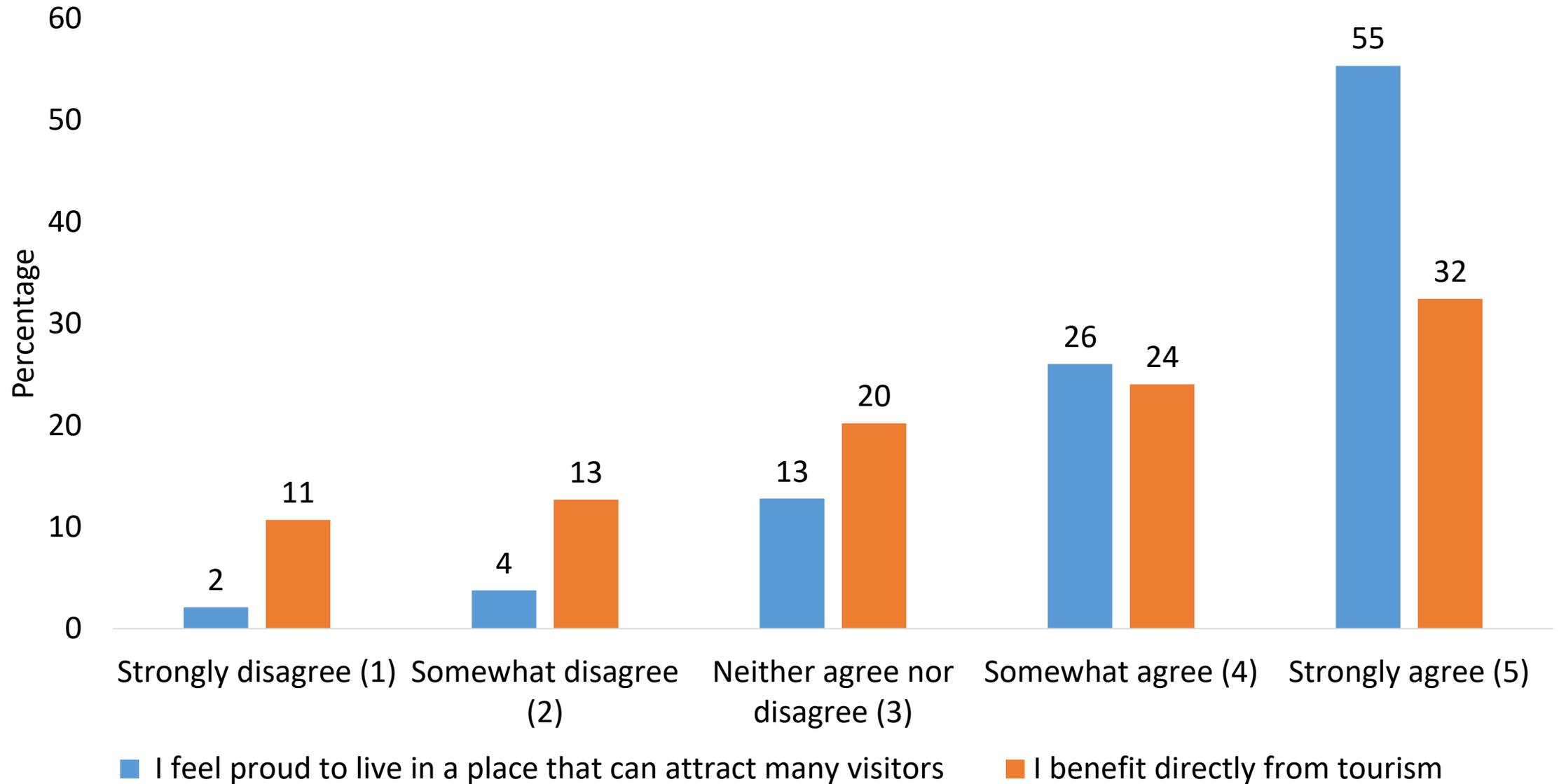


# Do you think that tourism is good for the Cook Islands?

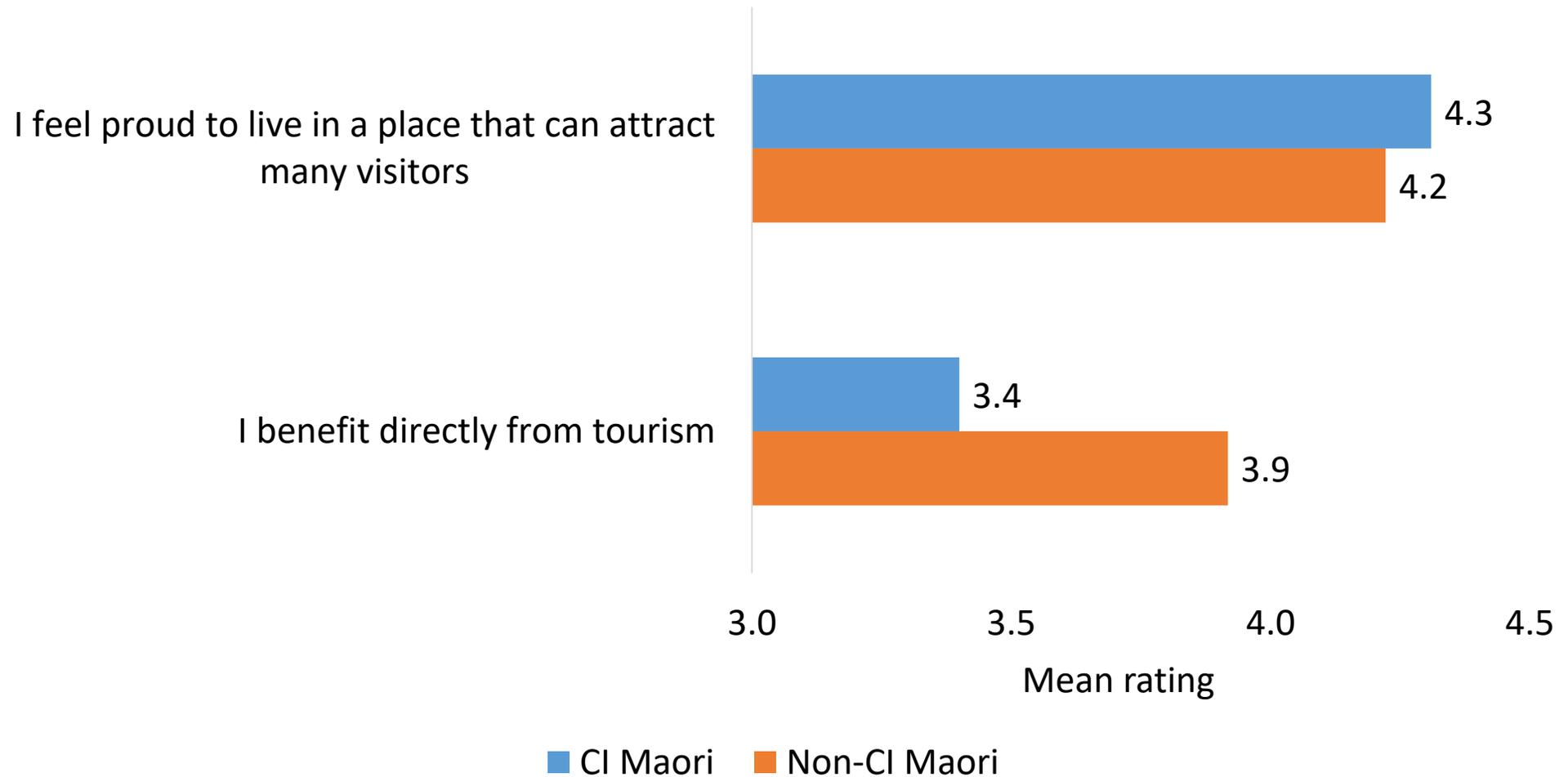
Rarotonga / Aitutaki



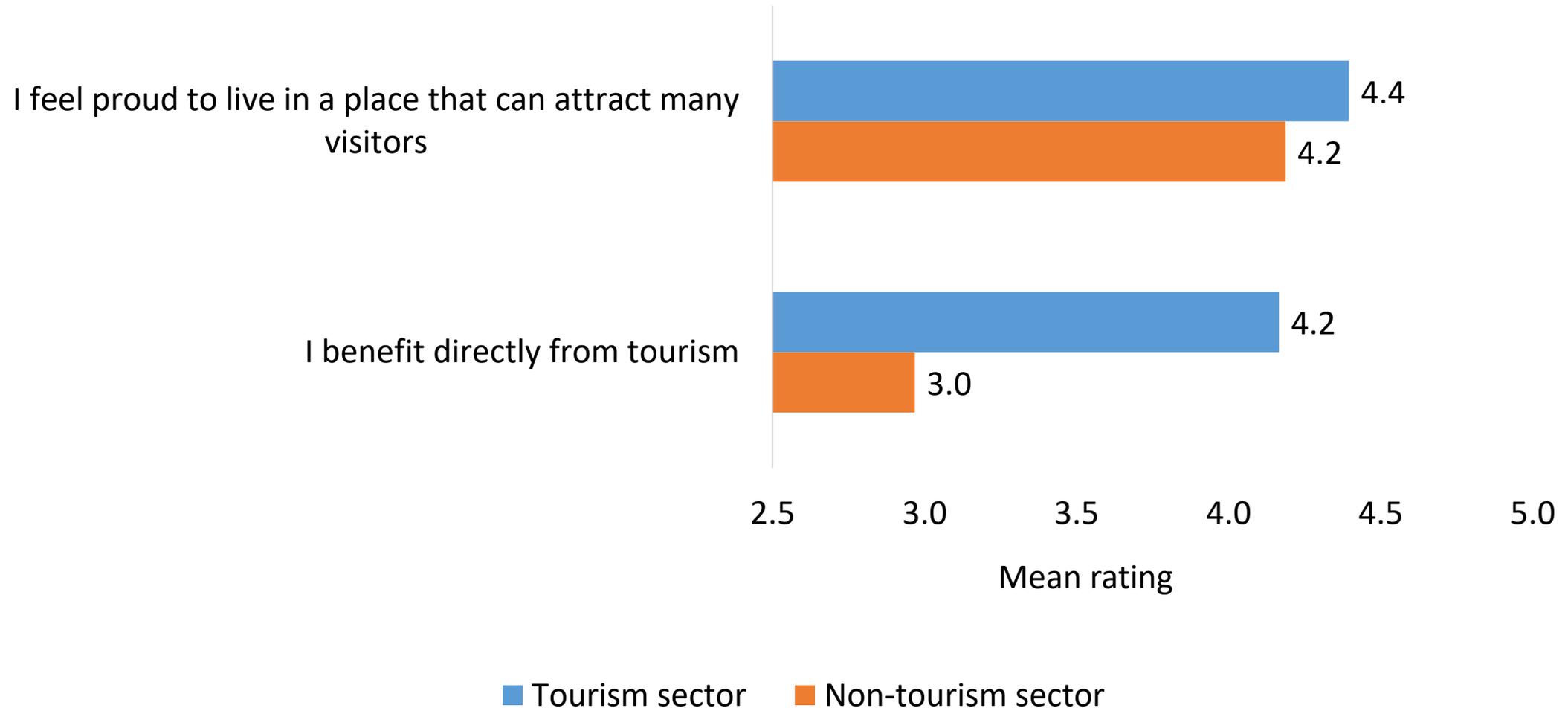
# Tourism as a source of pride and direct benefit



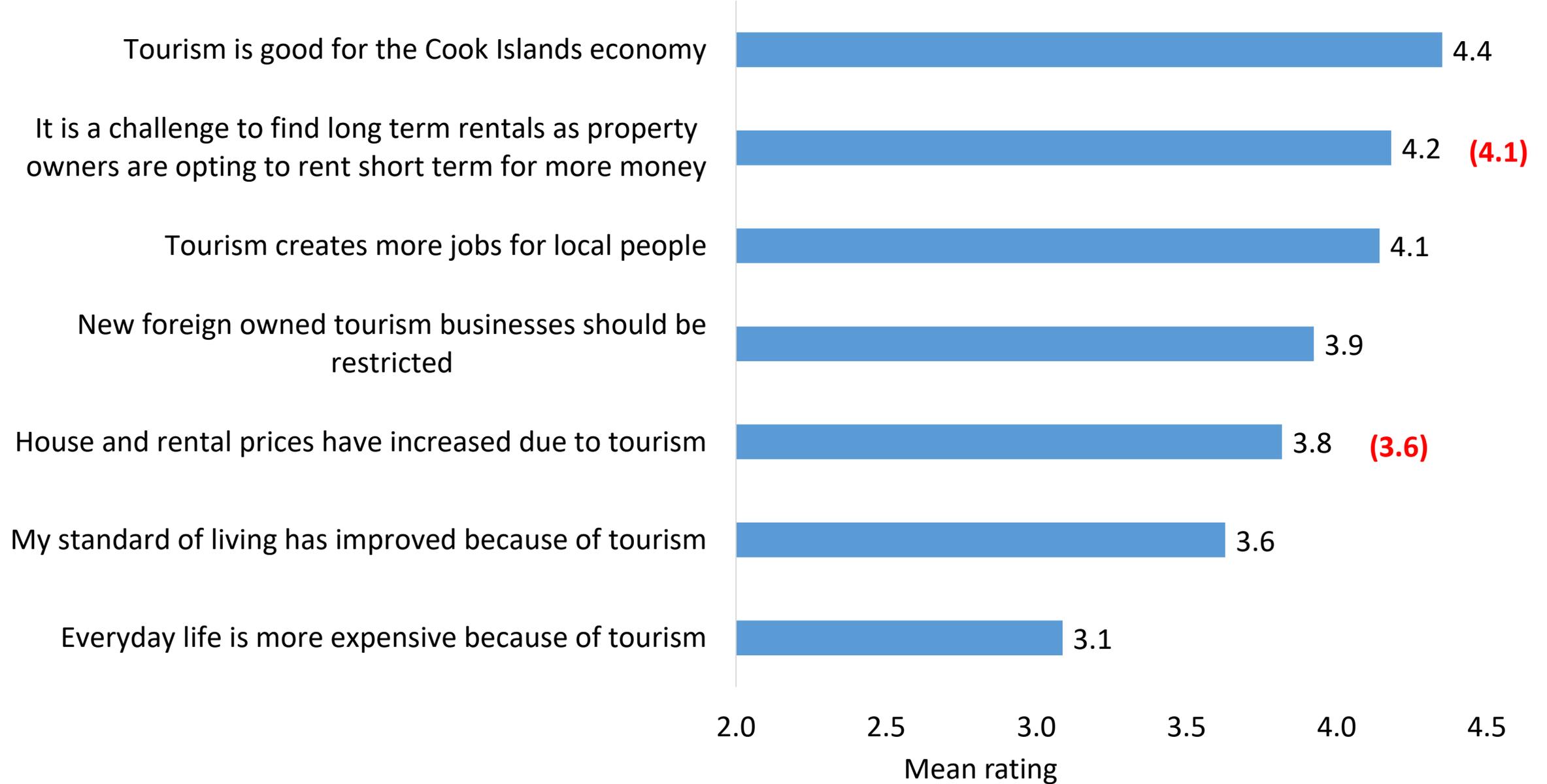
# Tourism as a source of pride and direct benefit – CI Maori/non CI Maori

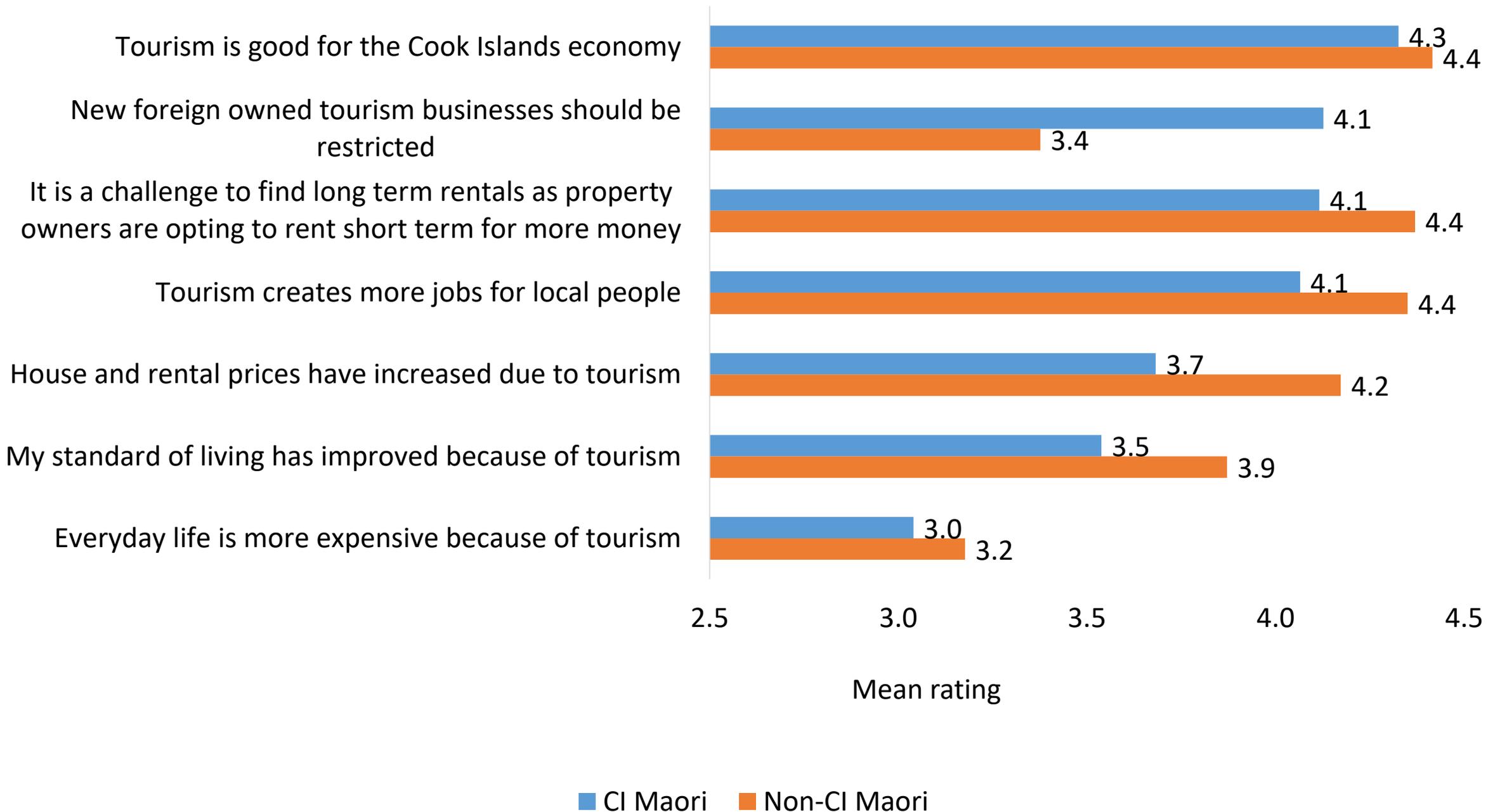


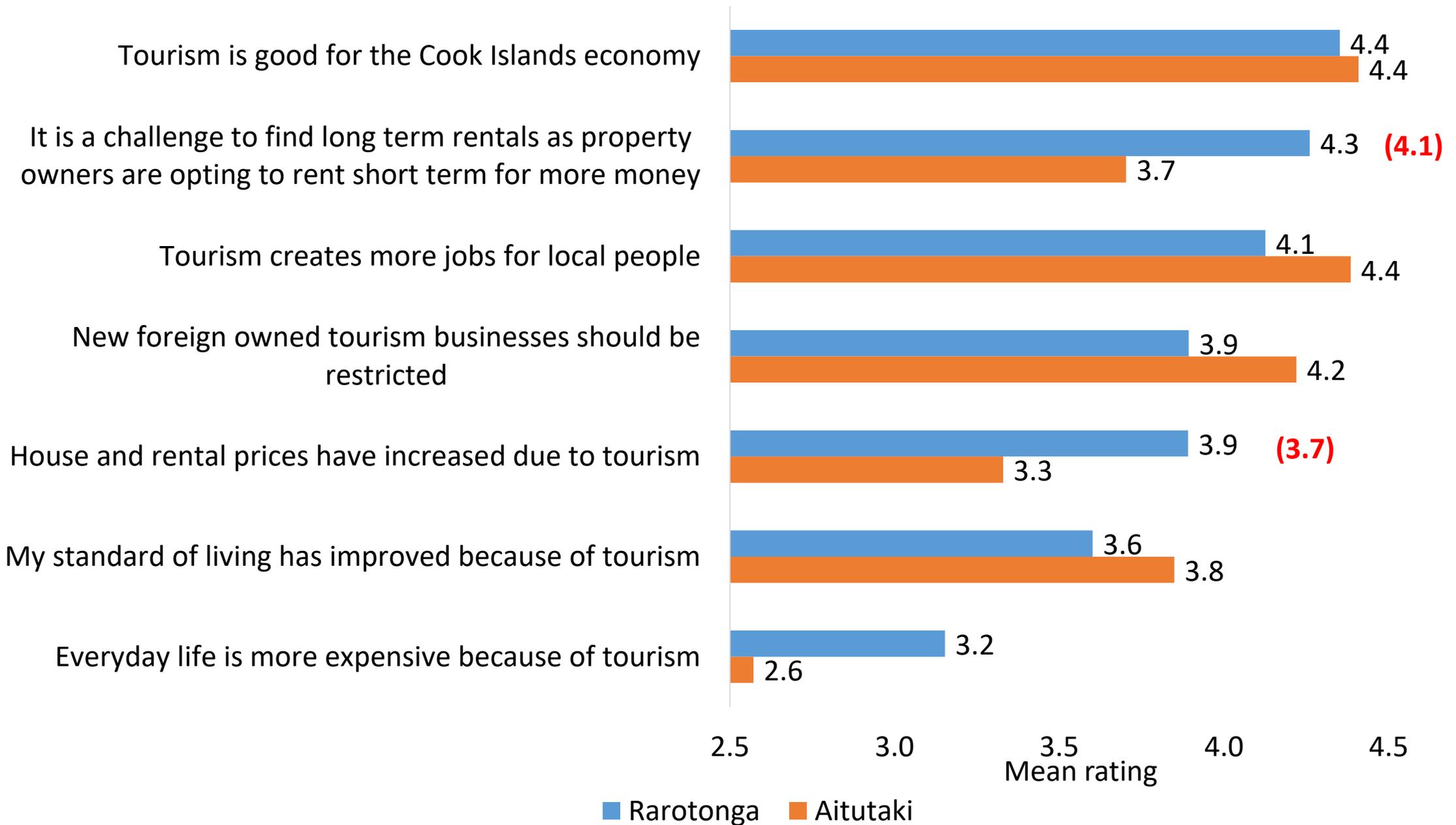
# Tourism as a source of pride and direct benefit - tourism/non-tourism

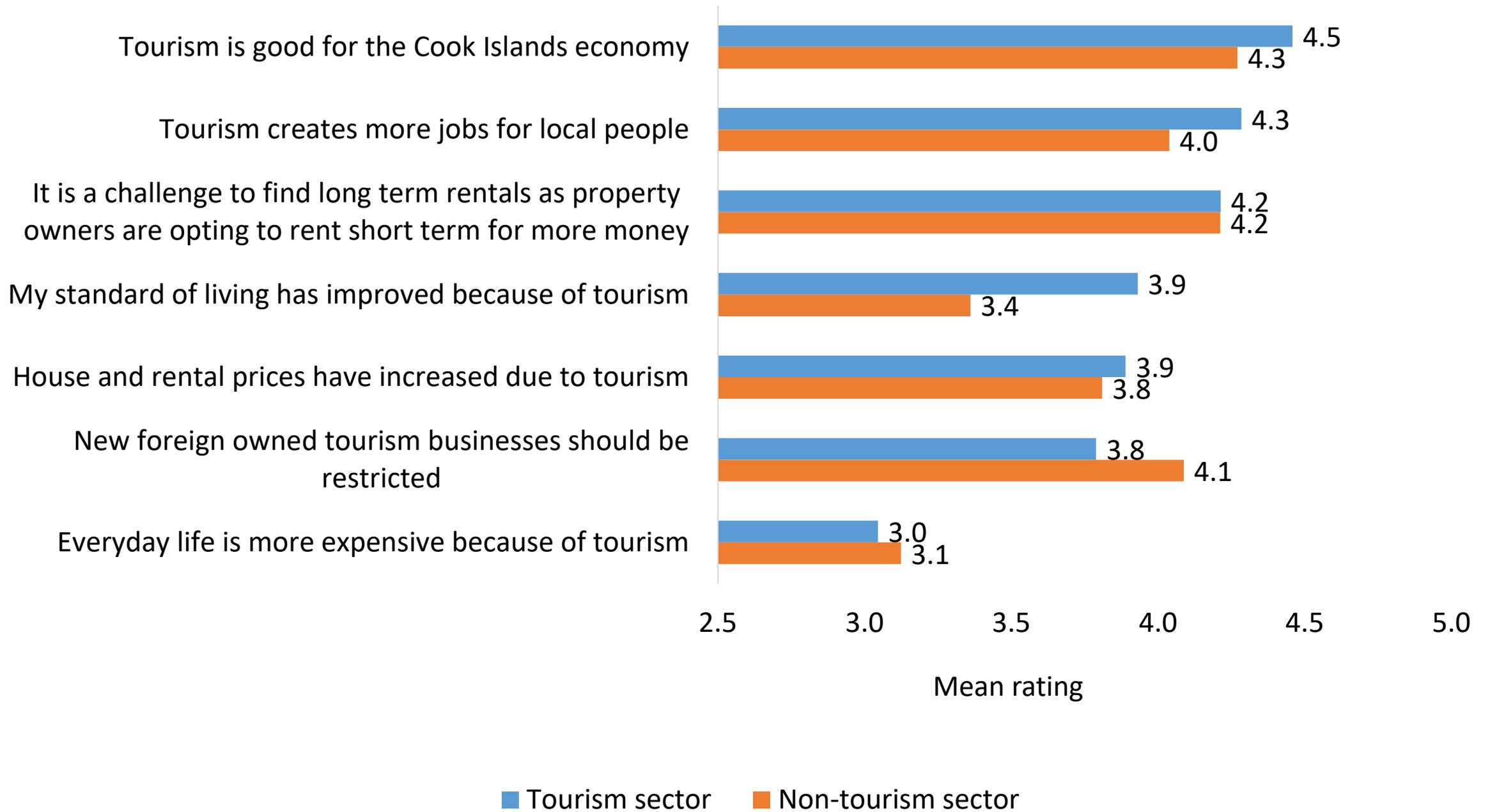


# Tourism and Economic Dimensions

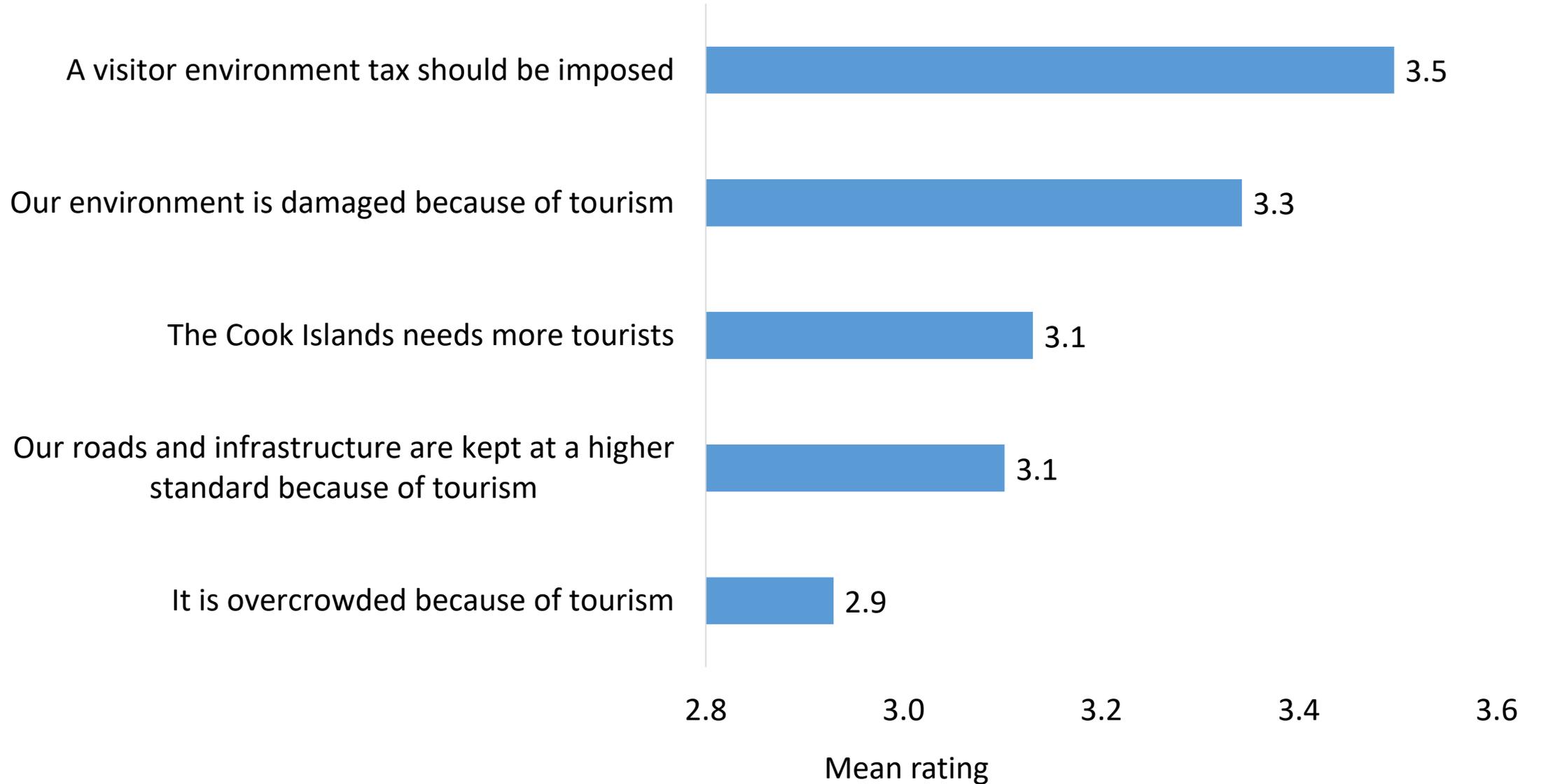


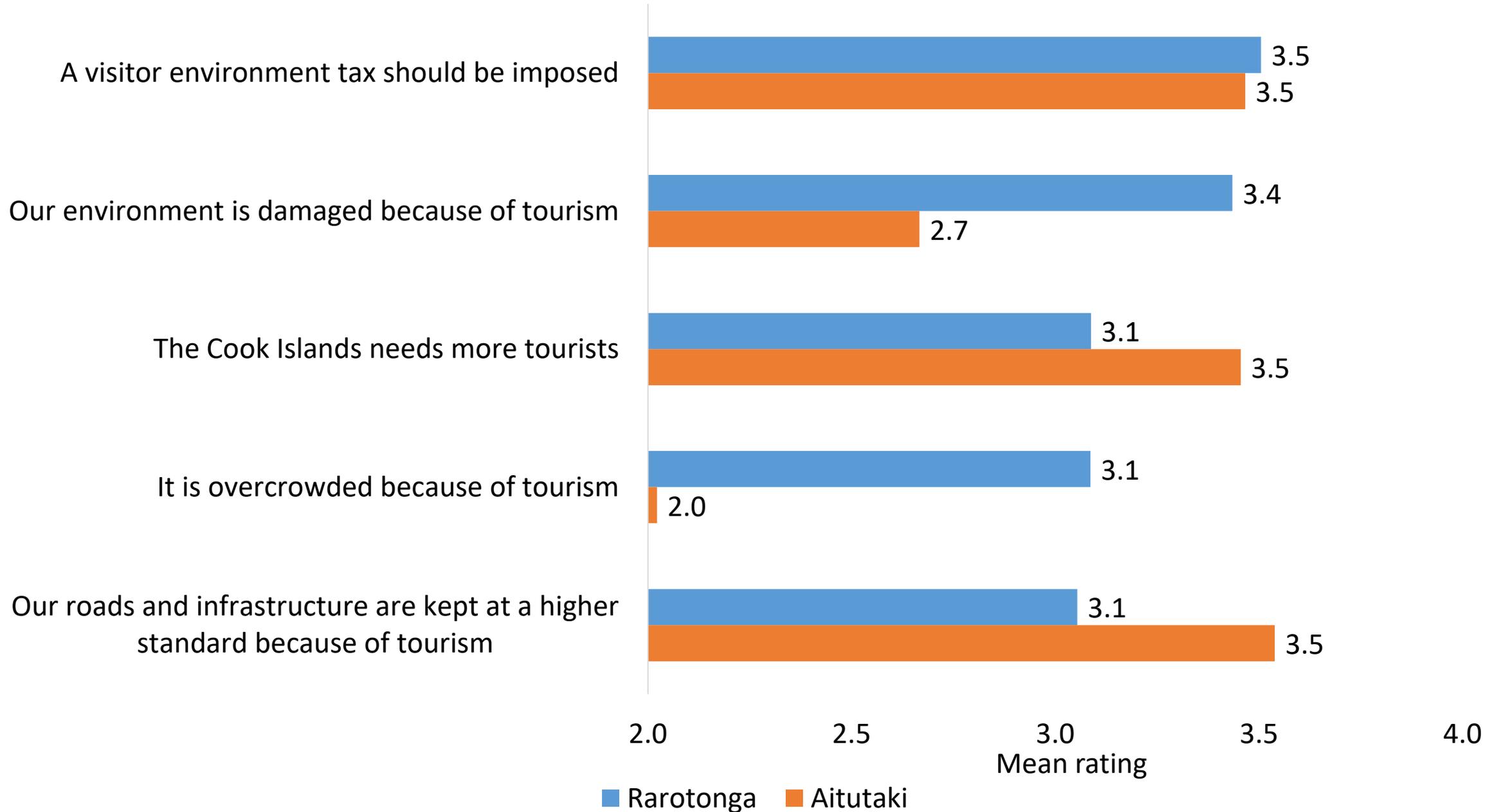




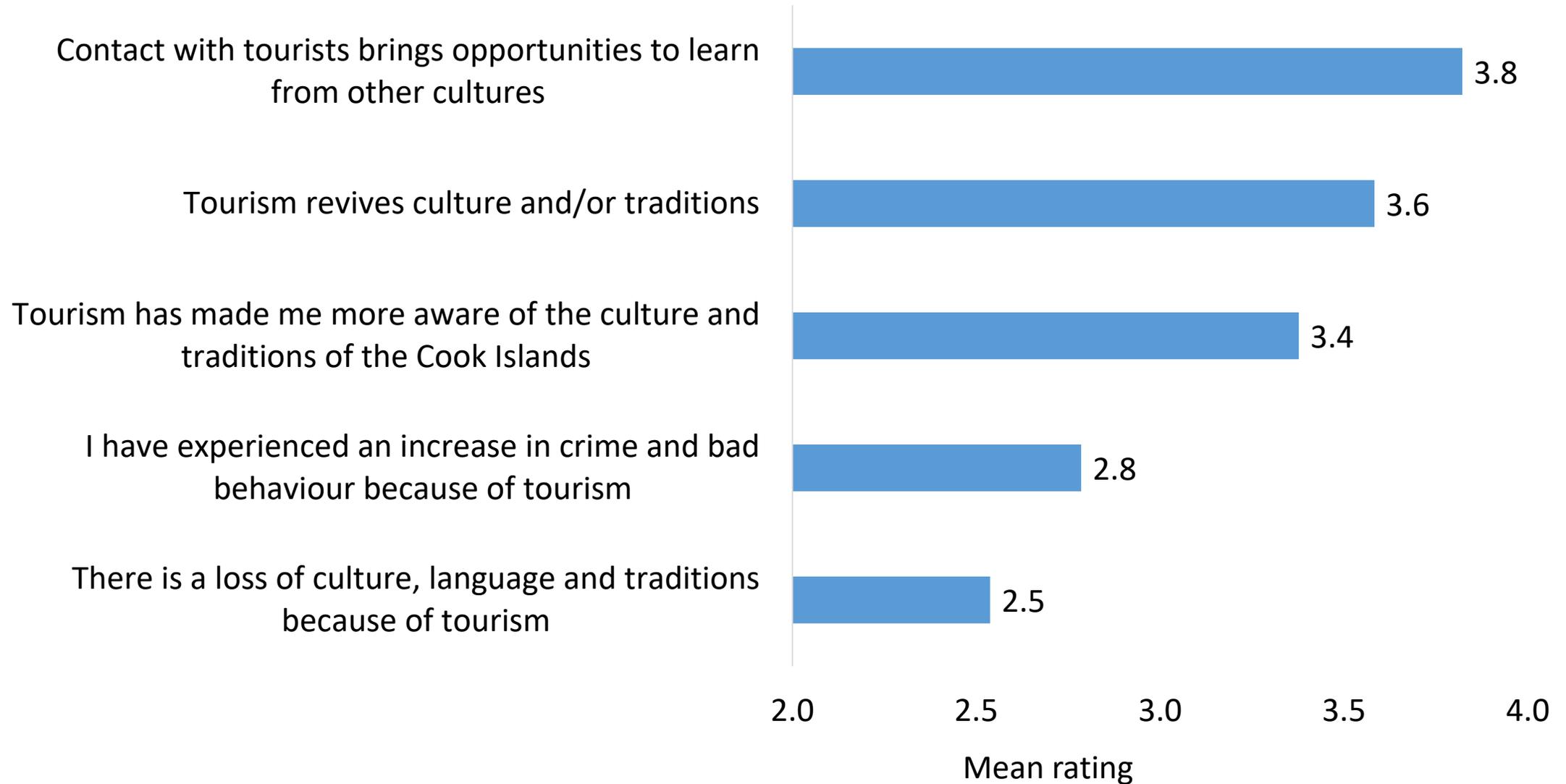


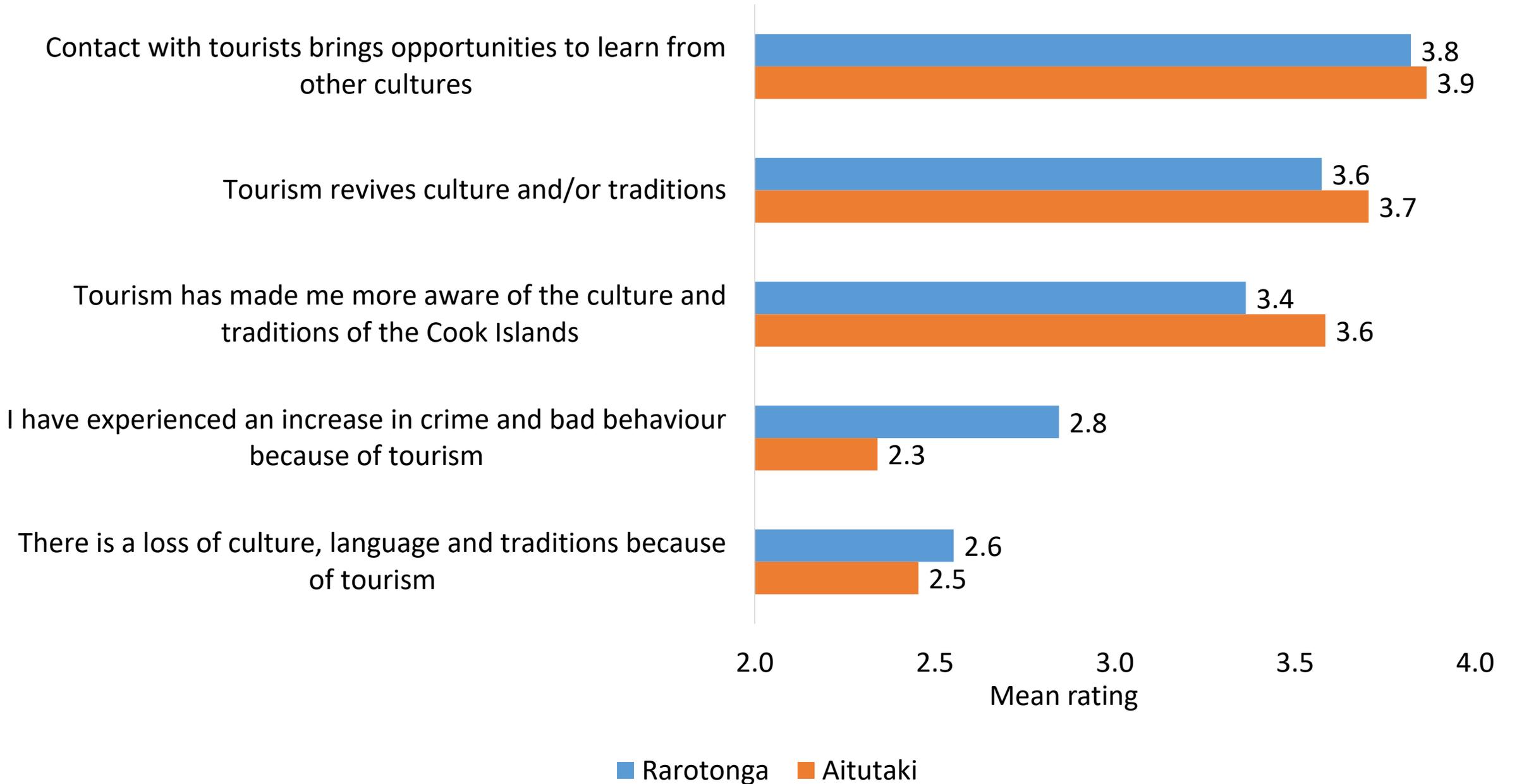
# Tourism and Environmental Dimensions



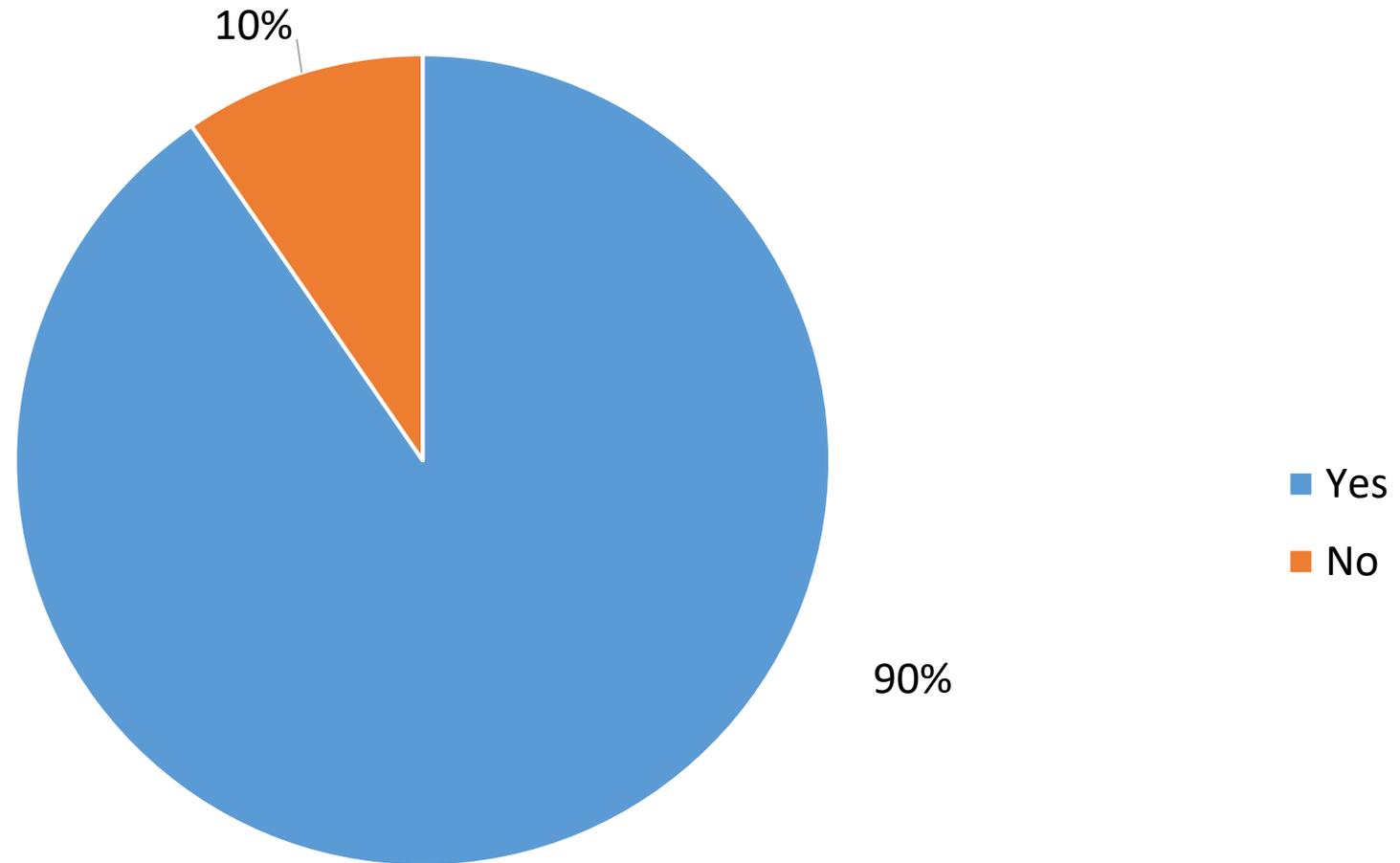


# Tourism and Cultural Dimensions



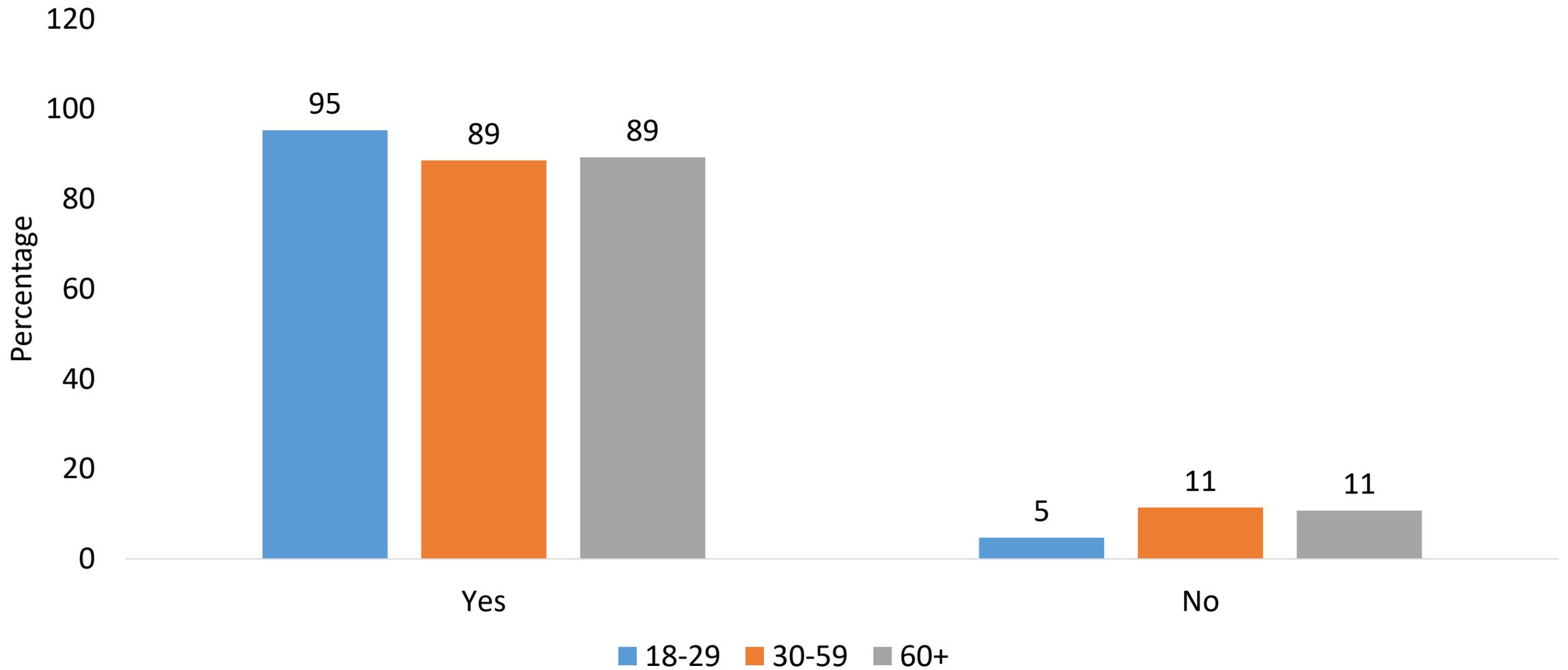


# I would like to share my culture and values with tourists



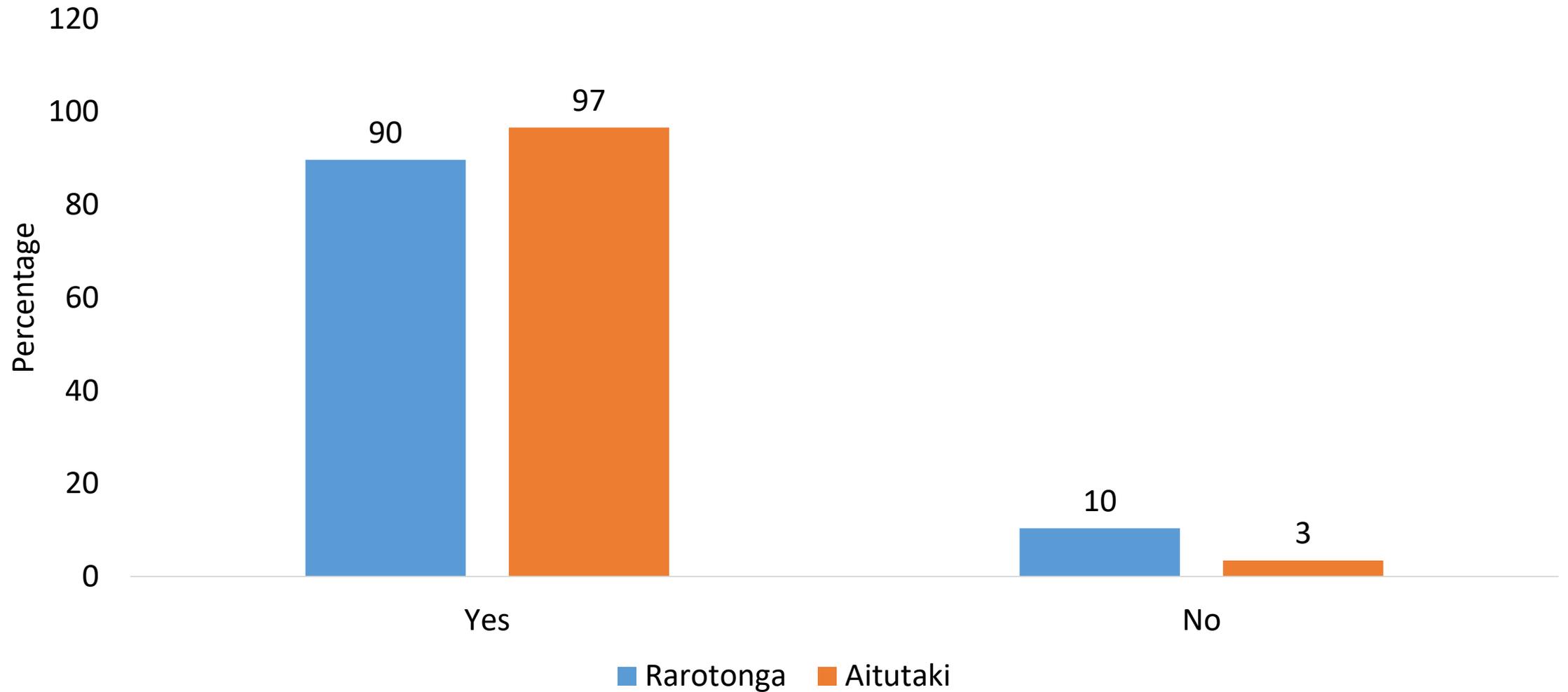
# I would like to share my culture and values with tourists

Age group

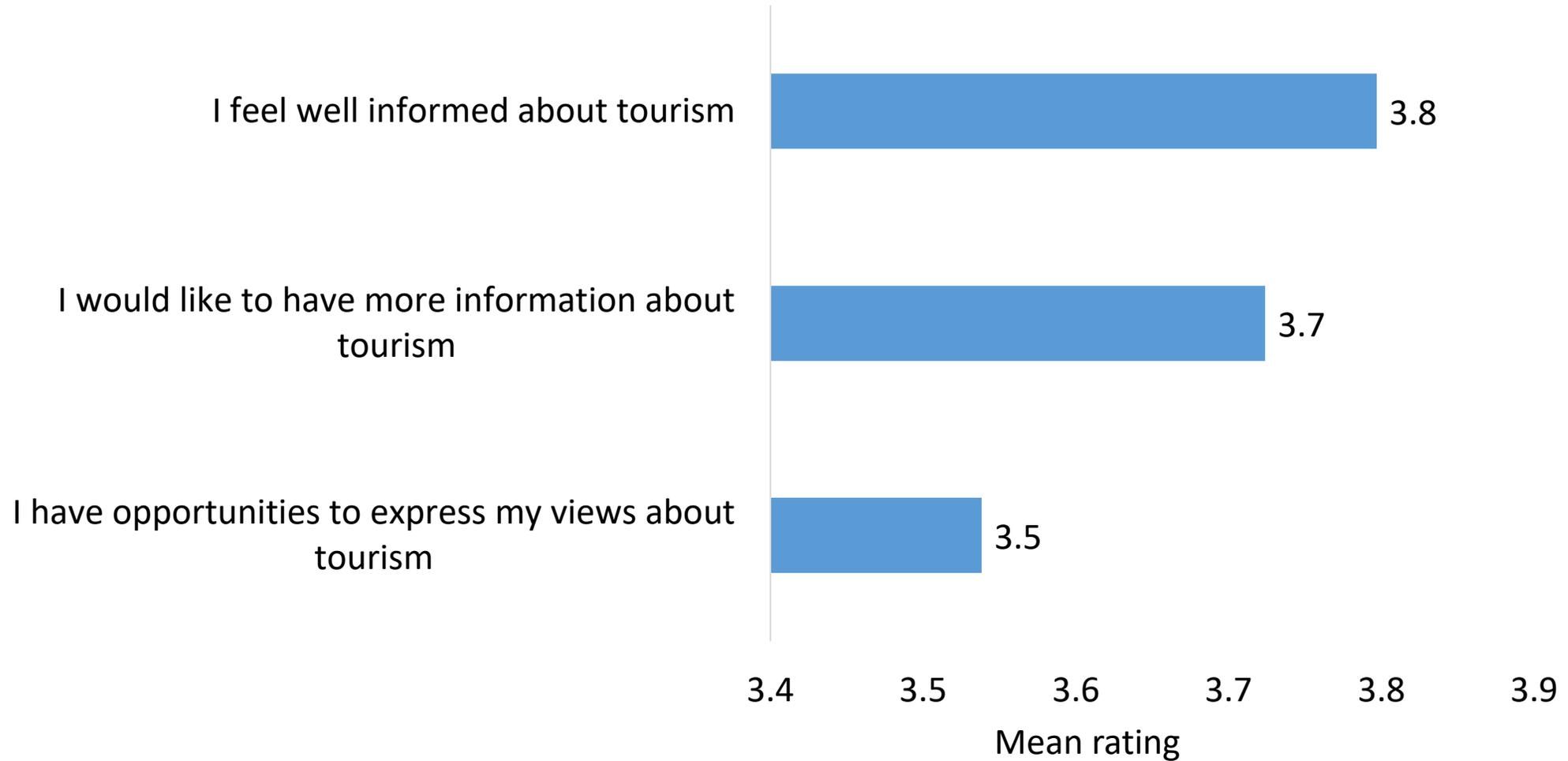


# I would like to share my culture and values with tourists

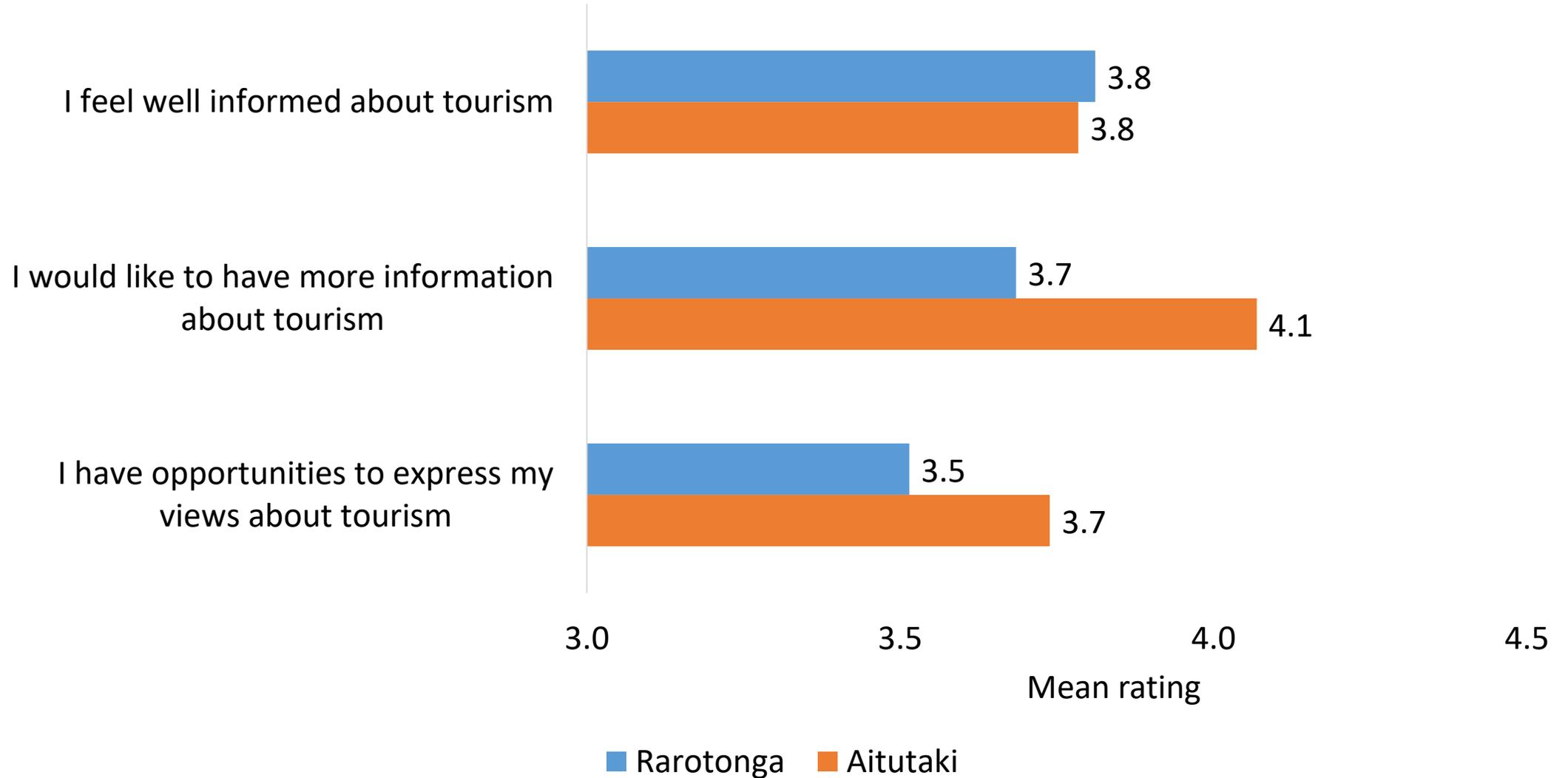
Rarotonga / Aitutaki



# Tourism and information



# Tourism and information access – Rarotonga/Aitutaki



# Themes identified (% of all comments made)

Suggestions on tourism development	Positive comments	Negative comments	Don't blame tourism or tourists	Neutral comments	Appreciation of being asked
68%	41%	38%	2%	2%	2%

Suggestions on tourism development	
Marketing	16%
Infrastructure improvement	15%
Government strategies and regulations	13%
Sustainable tourism development	12%
Balance culture and economic benefits	11%
Education referring to tourism	10%
Tourists education	5%
More opportunities & priorities for locals	5%
More events or activities	3%
More training for local businesses	3%
More connections	2%
Accommodation related regulations	2%
Foreigners (worker and owner)	2%
More opportunities for outer islands	2%

Positive comments	
Well done tourism	27%
Positive economic impacts	19%
Being proud of CI	19%
Tourists' positive impacts	13%
Good willing to contribute	8%
Positive environment impacts	6%
Positive cultural impacts	4%
Infrastructure development	1%

Negative comments	
Tourists' behaviours and numbers	34%
Environment impacts	19%
Social issues	8%
Local people' attitude and services	7%
Economic impacts	7%
Cultural impacts	5%
Political issues %and regulations	5%
General concerns	3%
Housing and renting	2%
Infrastructure	2%
Stop over-developing tourism	1%

# Positive comments

- Tourism not only changes peoples lives it also gives opportunity to those who are in need. So I may say tourism is a part of our day lives whether we are in business industry or not. Because from nothing to something that's all thanks to tourism.
- We clearly benefit greatly from tourism in the Cook Islands economically and it is an important economic driver to maintain.
- I am proud of my country when tourists choose to come here, and also when I hear good and positive comments from them.
- Tourist are complying with our cultural ways and customs.
- Look after tourism for the future generations.
- Tourism helps some of us keep our islands clean because we want to make a good impression on others about our home.

# Negative comments

- Tourism numbers are too high and now have an overall negative impact on the country.
- Environmental issues have been caused by the large number of tourists visiting the Cook Islands.
- Tourism is our future but we must have regulations to control its impact.
- Whether they well informed about the culture, important about some dress codes and keep safe, stay safe, and road rules.
- I think it is a shame that so many foreigners own tourism businesses.
- Overall tourism has increased social inequality, loss of culture and environmental destruction- this needs serious consideration and to be brought under control. Meitaki.
- The substantial cost of long term renting is another existing issue due to tourists staying in Raro, very difficult for some.

# Suggestions on tourism development

- More promotion and affordable travel to the outer islands - they offer a very different type of holiday and their beauty should be shared.
- We need to implement a local price/tourist price situation like many other tourism heavy countries, this is easily done and tourists are understanding.
- Stop promoting Rarotonga with photos of Aitutaki. Aitutaki should be promoted as its own destination not a day trip.
- Better infrastructure is needed in order to deal with the rise in tourism numbers.
- Tourism is good to a limit but must be controlled to a point that is sustainable.
- Balance growth of Tourism with Environment and retention of traditional practices to avoid exploitation
- Educating our young ones.
- Local community must benefit and not have profits head off overseas.

# Don't blame tourism or tourists

- We lost our language & culture thru education a long time ago. Don't blame the tourists. The crime rate in increased when they started sending our bad kids back from Australia & New Zealand. Tourism is very good for the country. Bring it on.
- Cost of living for most people I know is very high and struggling to put food on the table, not because of tourism.
- Tourism is the backbone of Cook Islands economy, it has a good and bad side , but many of the issues that bother us in the Cook Islands we must look at within ourselves and not lay blame on others.
- It's easy to blame tourists for the feeling of overcrowding and visible damage to our roads and environment, but as a country I believe that we need to invest ourselves into the infrastructure and planning of our land and resources in order to accommodate both our visitors and locals.

# Appreciation of the survey....

- Manea note teia au tuatua akakite.
- Good survey.
- Great survey guys keep up the good work.
- Thanks for having this opportunity to fill out this survey form... Kia Orana e Kia Manuia.

# Te Kaveinga Nui

National Sustainable  
Development Plan  
2016 - 2020



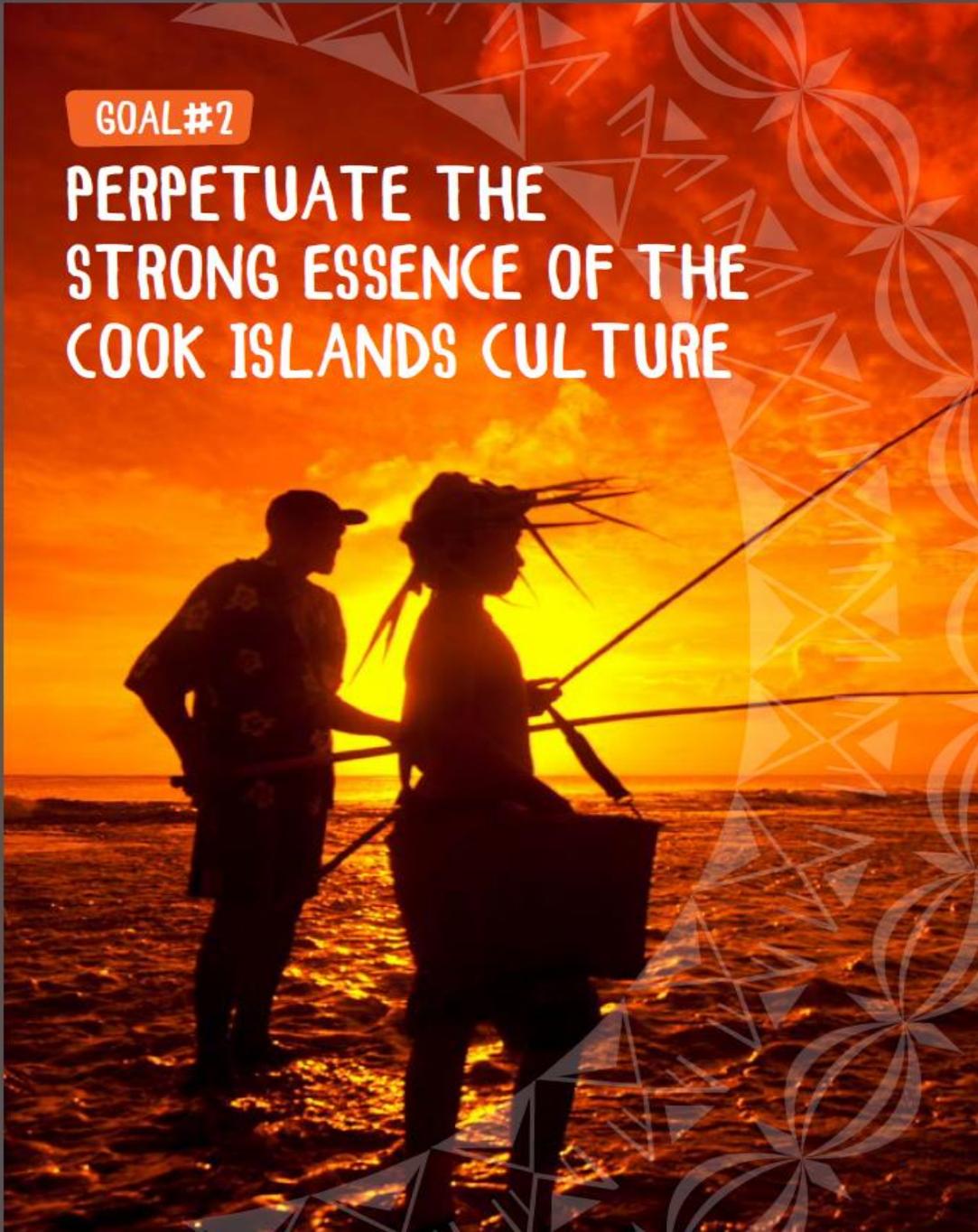
GOVERNMENT OF THE COOK ISLANDS  
THE OFFICE OF THE PRIME MINISTER



## The National Development Goals

A scorecard for national development

- 1 Improve welfare, reduce inequity and economic hardship
- 2 Expand economic opportunities, improve economic resilience and productive employment to ensure decent work for all
- 3 Promote sustainable practices and effectively manage solid and hazardous waste
- 4 Sustainable management of water and sanitation
- 5 Build resilient infrastructure and Information Communication Technologies to improve our standard of living
- 6 Improve access to affordable, reliable, sustainable, modern energy and transport
- 7 Improve health and promote healthy lifestyles
- 8 Ensure inclusive and equitable quality education and promote life-long learning opportunities
- 9 Accelerate gender equality, empower all women and girls, and advance the rights of youth, the elderly and disabled
- 10 Achieve food security and improved nutrition, and increase sustainable agriculture
- 11 Promote sustainable land use, management of terrestrial ecosystems, and protect biodiversity
- 12 Sustainable management of oceans, lagoons and marine resources
- 13 Strengthen resilience to combat the impacts of climate change and natural disasters
- 14 Preserve our heritage and history, protect our traditional knowledge, and develop our language, creative and cultural endeavours
- 15 Ensure a sustainable population engaged in development by Cook Islanders for Cook Islanders
- 16 Promote a peaceful and just society and practice good governance with transparency and accountability



**GOAL #2**

**PERPETUATE THE STRONG ESSENCE OF THE COOK ISLANDS CULTURE**

**TOURISM POLICY GUIDELINES AND INDICATORS**

**B. CULTURE AND HERITAGE**

Cultural heritage and intangible heritage are key elements of the tourism industry in the Cook Islands, underpinning the unique sense of place that the country, and each of its islands, offers visitors. Land lies at the heart of culture and visitors not only experience the terrestrial resources on offer but also the cultural dimensions, museums, creative arts and intellectual property that are important elements of the Cook Islands experience. While it is vital to ensure that the everyday life and culture of local people is shared with visitors this must be done in an appropriate fashion that is informed by the community itself.

» **The community experience of tourism must be better understood and valued alongside the visitor experience**

Hosts are not just the property owners and restaurant staff who visitors interact with – they are the broader host community in all its forms. It is vital that communities throughout the Cook Islands benefit directly from tourism and that they are aware of the benefits (and potential costs) the industry brings. To understand community awareness of and links to tourism it is vital to put in place ongoing community focused research on any islands exposed to tourism development.

- Community support for tourism. The percentage identifying as strongly supportive or showing limited support.
- Community impacts of tourism – local identification of benefits and costs (%)

» **Maximise opportunities for visitors to understand and learn about heritage in all its forms.**

If community are to benefit from tourism it is vital that they have opportunities to link to the industry directly through appropriately developed and managed products and experiences. An increase in visitors engaging in appropriate forms of community focused tourism will support the growth of local jobs and income and also enrich the visitor experience. This is particularly vital in the Outer Islands where the opportunity exists to build on dimensions of everyday life and culture that offer a point of difference to

Rarotonga.

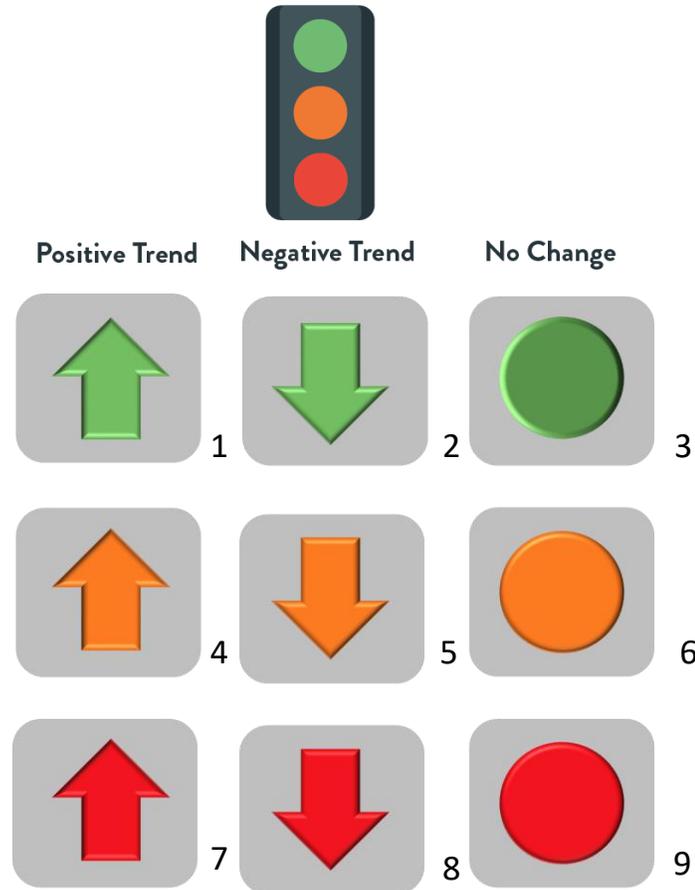
If cultural heritage sites are to be linked more effectively into the tourism experience they require protection, maintenance and interpretation – tourism can play an important role in assisting to fund such sites.

- percentage of visitors engaging in culturally immersive activities
- visitor satisfaction with culturally immersive activities
- number/percentage/range of tourism products and/or experiences featuring community/cultural elements
- amount of user pay funding going to protect heritage sites

» **The Kia Orana Values program is sustained and developed**

The Kia Orana Values program is a vital tool to reinforce the important links between community, culture and sustainable tourism development. It is important that the early gains achieved by this program are sustained through ongoing investment. The success of the approach can be monitored through the community research discussed earlier in this section.

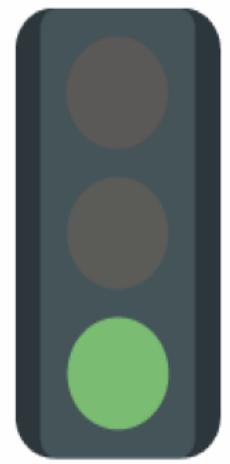
- Funding continues for the Kia Orana program and grows with visitor numbers or as issues require intervention.



Each diagram has nine possible scenarios, represented as numbers, that are used to assess each indicator. There are:

1. On track and continues to improve.
2. On track, however there are signs of regression.
3. On track, and no changes since the previous year.
4. Of concern, however there are signs of improvement.
5. Of concern, and regressing. Requires attention.
6. Of concern, and no change since the previous year.
7. Off track, data suggests an improvement.
8. Off track and continues to regress.
9. Off track and there has been no change since the previous year.

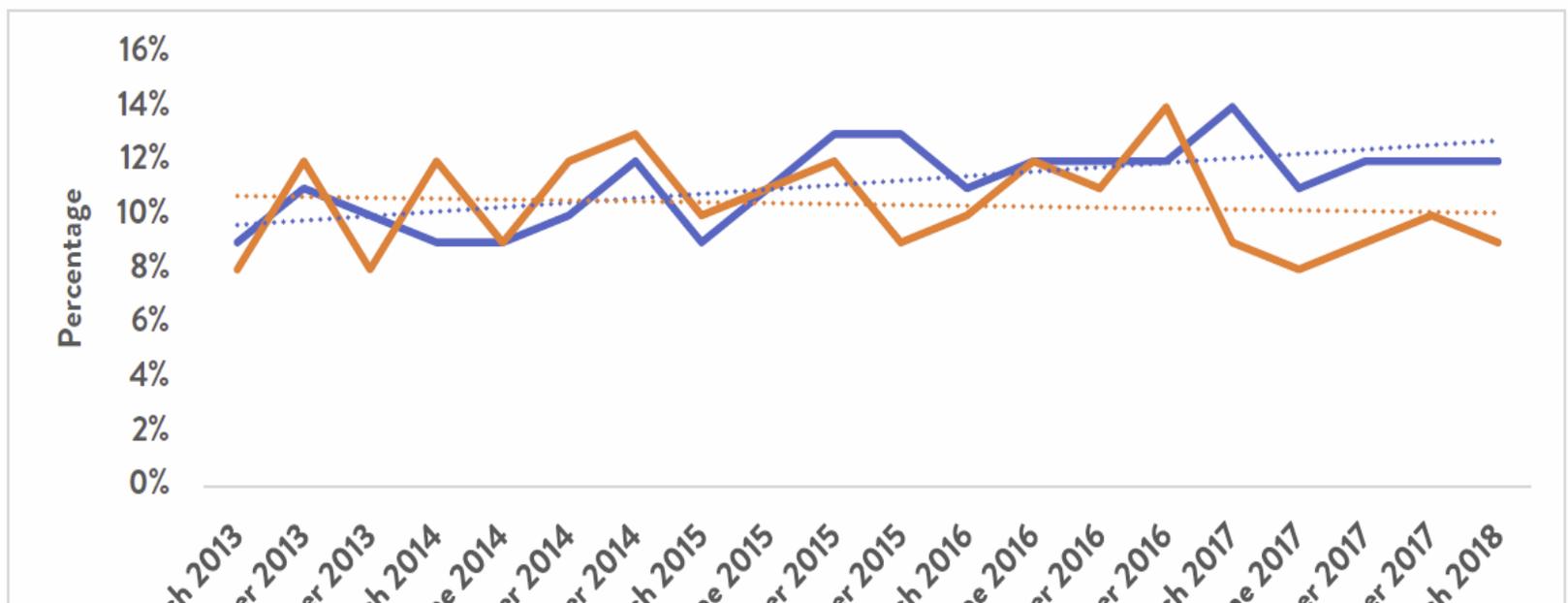
Note: Based on National Sustainable Development Plan 2016 - 2020



# On Track

1 Visitor comments on availability of local food

Positive Trend ↑





Meitaki Ma'ata/Thank You!

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