

Cook Islands

International Visitor Survey Annual Report
July 2023 - June 2024



Acknowledgements

- ❖ The Pacific Tourism Organization (SPTO) expresses its gratitude to all contributors to this report on IVS data from July 2023 to June 2024, which provides insights into the visitor experience and tourism recovery in the Cook Islands post-border reopening.
- ❖ Thank you to the visitors for completing arrival and departure cards, enabling this analysis. Special thanks to the Cook Islands Tourism Corporation (CITC) for providing the visitor emails to enable survey invitations to be dispatched in a timely manner.
- ❖ We also extend our sincere thanks to the New Zealand Government for their support and collaboration.
- ❖ Appreciation goes to the SPTO researchers and analysts for their meticulous work on visitor profiles, decision-making processes, and expenditure and satisfaction.
- ❖ Further research is needed to refine economic impact estimates, particularly the rate of prepaid expenditure into the local economy. Your ongoing support is highly valued.
- ❖ Thank you to everyone involved.

Executive Summary

- ❖ The survey, conducted from July 2023 to June 2024, analyzed 1,881 responses out of 3,190 collected, representing 2% of actual visitors with a 9% response rate. Among the respondents, 57% were first-time visitors, and the average household income was NZD 154,948.
- ❖ Visitors were primarily attracted by nature attractions, cultural experiences, business opportunities, and connections with family and friends in the Cook Islands. Overall visitor satisfaction was high, with a rating of 4.7 out of 5. A substantial 98% of visitors indicated they would recommend Cook Islands to others, and 93% expressed willingness to return.
- ❖ The average prepaid spend per visitor was NZD 2,462 with an estimated 40% (NZD 984) flowing into the local economy. In-country spending per visitor per trip averaged NZD 2,197 with an average stay of 8.9 nights. This contributed to a total economic impact of NZD 520 million from July 2023 to June 2024.
- ❖ Visitors were most attracted to the clean environment, pleasant weather, friendly locals, and the relaxed atmosphere. On the other hand, they found public services, facilities and infrastructure, the prices of goods and services, and occasional unfavorable weather to be least appealing. To enhance the overall visitor experience, suggestions included improving accommodations and services, enhancing public services and infrastructure maintenance, as well as offering more entertainment, activities, and events.

Background

- ❖ The July 2023 - June 2024 Cook Islands Visitor Survey is an initiative of the Pacific Tourism Data Initiative, funded by the Zealand Ministry of Foreign Affairs and Trade (NZMFAT), and is conducted by the Pacific Tourism Organization (SPTO).
- ❖ IVS data from July 2023 - June 2024 is analysed to help us understand the visitor experience and gain insights into tourism recovery the Cook Islands after the border reopening.
- ❖ The report includes key sections on visitor profiles and characteristics, information and decision-making, visitor expenditure and satisfaction.
- ❖ **N.B.** The visitor emails were collected through the passenger arrival cards completed by visitors on their arrival into Cook Islands.
- ❖ **N.B.** The estimated rate of prepaid expenditure flowing into local economy is 40%, which is observed from other Pacific Island countries. Further research is warranted to establish more accurate estimates.
- ❖ All amounts are reported in **NZD** currency using average rates for the July 2023 - June 2024 period.

Disclaimer

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- ❖ The **survey instrument** used to collect data for the July 2023 to June 2024 period was similar, but not exact, to the survey instrument used in the July 2023 to June 2024 period. New questions were added, a handful of existing questions were removed, and the response options for some questions were altered. In those instances where comparisons cannot be made, we report only the results for the July 2023 to June 2024 period.
- ❖ **N.B.** All analyses are based on the IVS respondents. No weighting was applied, as the sample data is representative. Therefore, the IVS respondents were not weighted to the actual arrival data.
- ❖ Please note that the Pacific Tourism Organization (SPTO) and the Cook Islands Tourism Corporation (CITC) do not accept liability for any loss or damage incurred as a result of the use of information contained in this report. Users are advised to exercise their own judgment in the use of any information provided.

IVS Respondents (July 2023 - June 2024)



19,726 TOTAL VALID EMAILS SENT



1,881 TOTAL RESPONSES ANALYZED

Note: 3,190 responses were received. After data cleaning, 1,881 responses remained.

9%

CONVERSION RATE

RESPONSES COVERED



3,254 ADULTS



512 CHILDREN

2%

OF ALL VISITORS IN THIS PERIOD

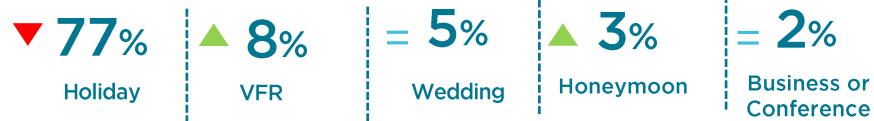
Cook Islands International Visitor Survey

Snapshot July 2023 – June 2024

Country of residence



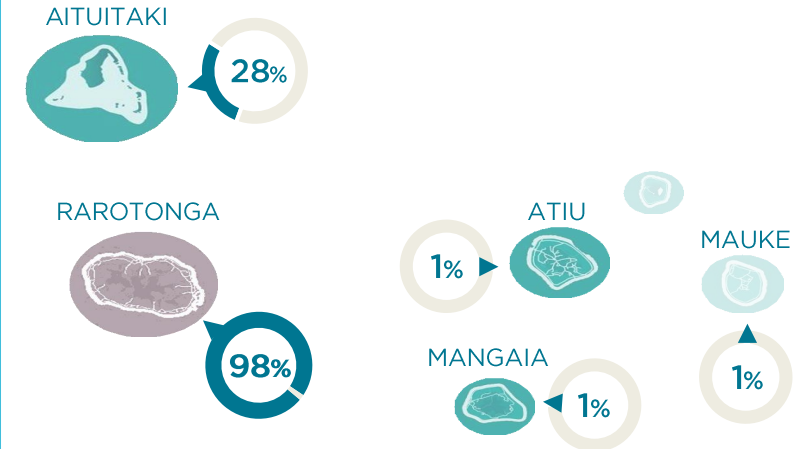
Purpose of visit



Most Participated Activities



Islands visited



Most appealing



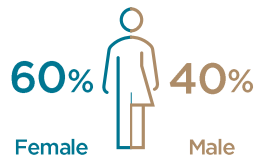
Least Appealing



Improvement



Economic impact

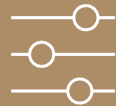


Note: The estimated flow-back rate into the Cook Islands for prepaid spend is 40%. With an average prepaid spend of \$2,462 per person per trip, this equates to \$984.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making

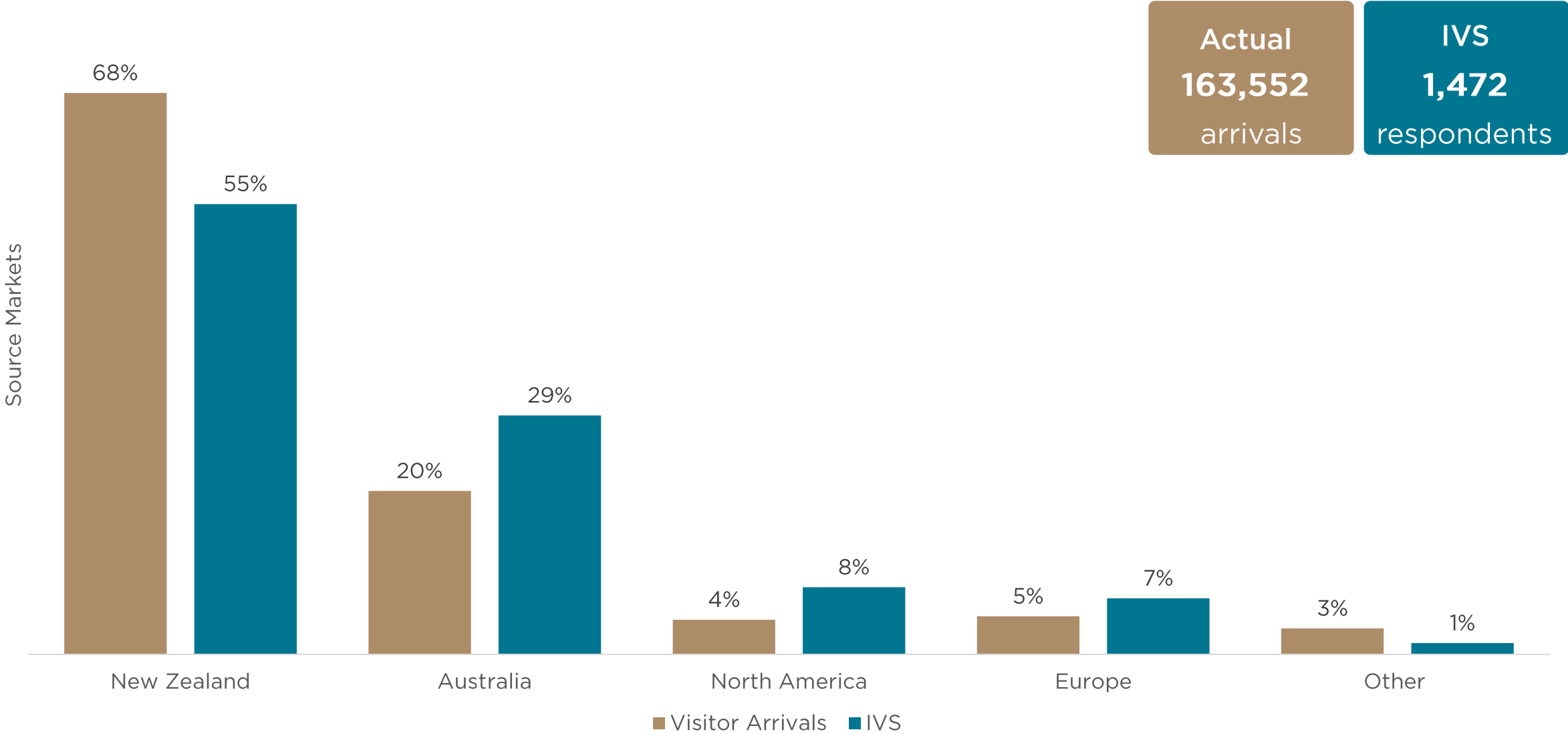


Visitor Spending
& Impact



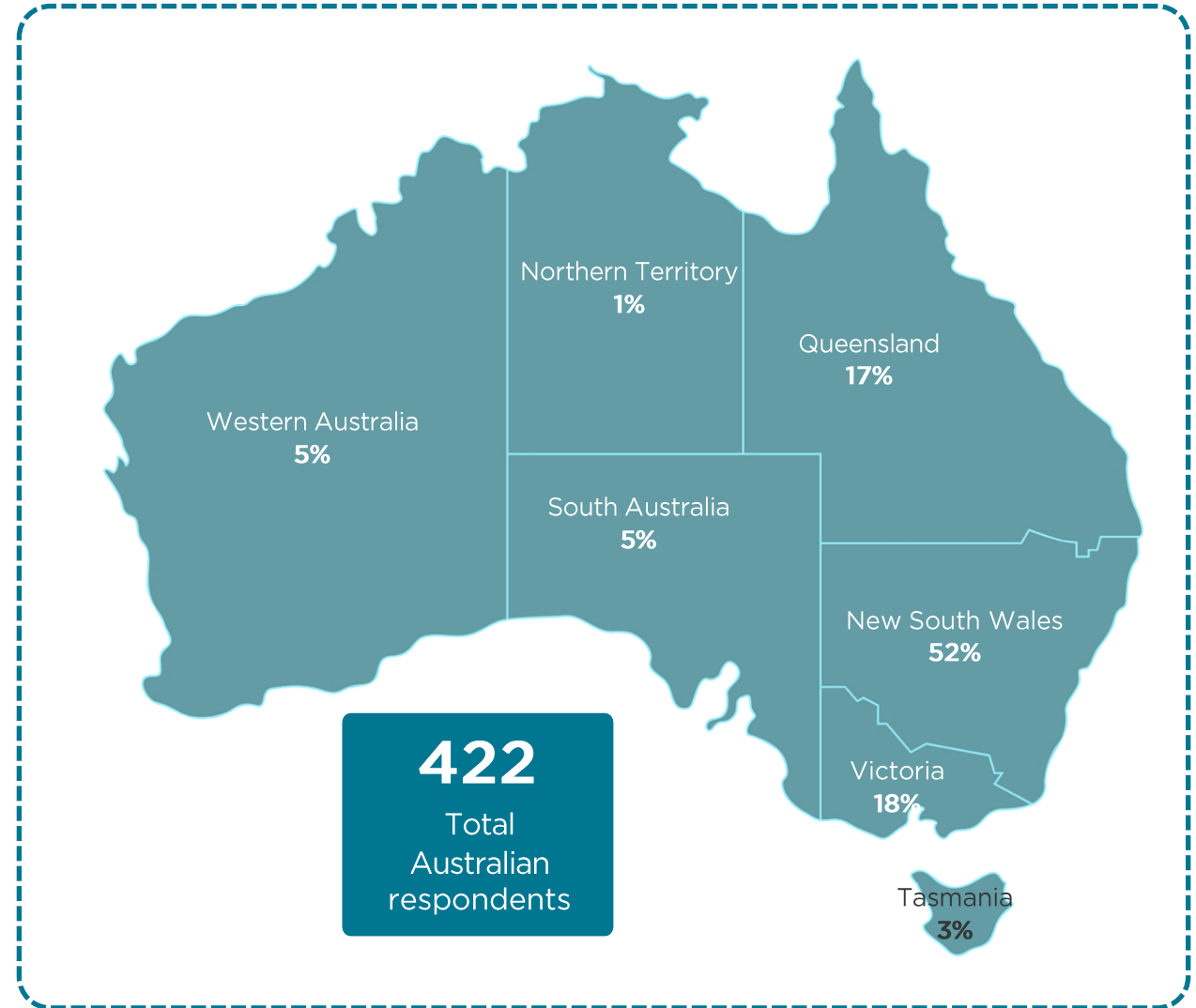
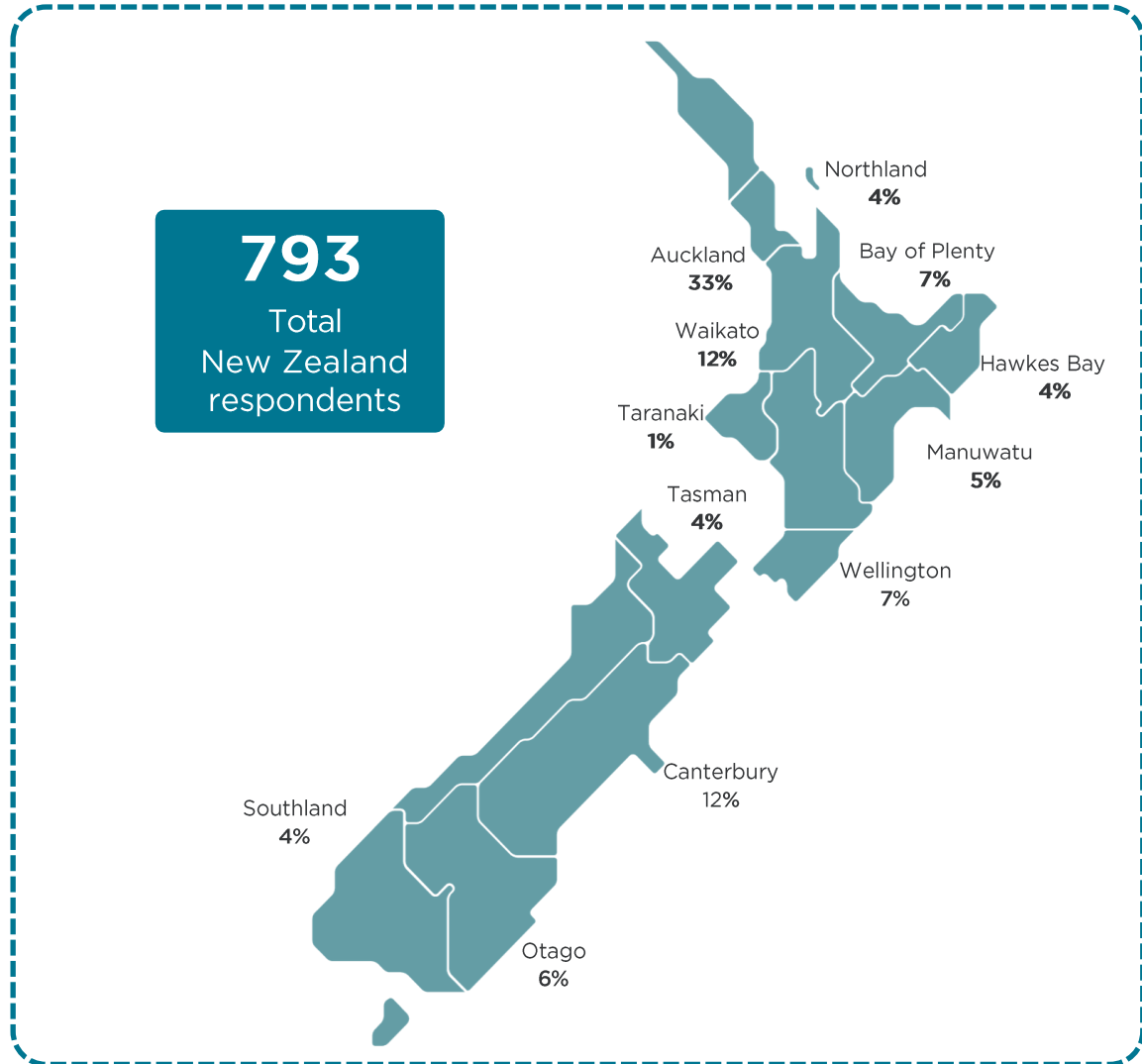
Visitor
Satisfaction

Source Markets: IVS Respondents vs Actual Arrival



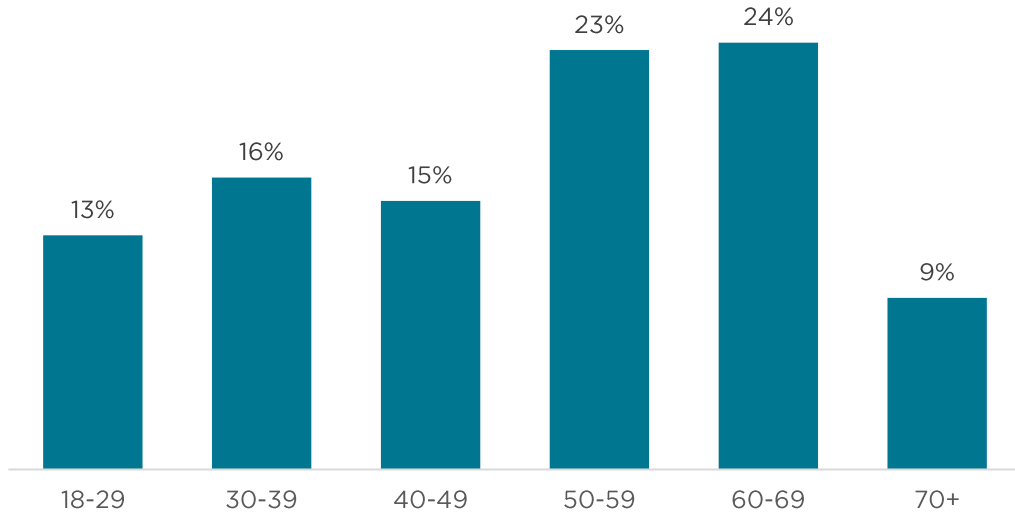
Note: Due to rounding, some totals do not sum to 100%. No weighting was applied, as the sample data is representative..

Top Source Markets



Respondent Demographics

Age



Gender



Annual Household Income

Avg. household income

NZD \$154,948
USD \$94,480



Note: % share of IVS respondents. \$ in NZD. The average exchange rate to NZD and USD for Jan - Mar 2024 was applied.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



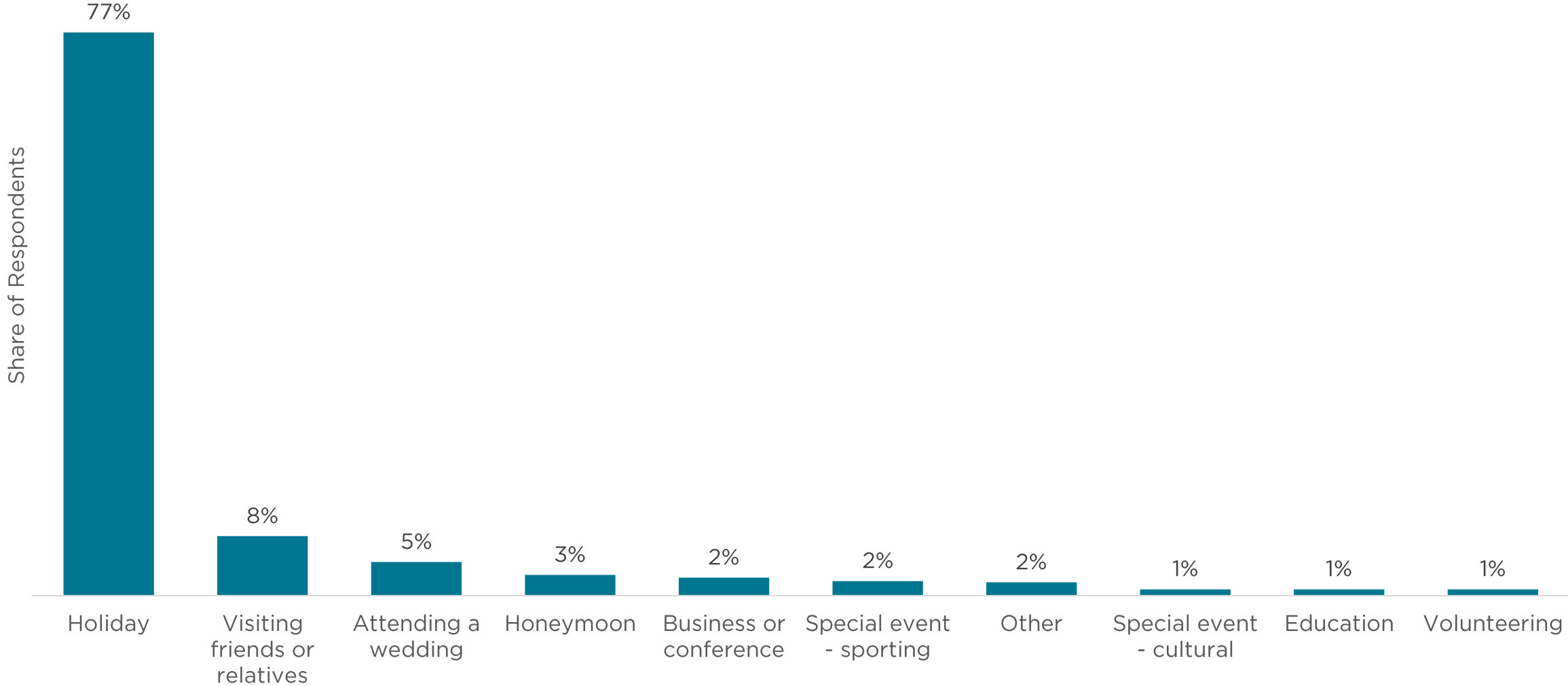
Visitor Spending
& Impact



Visitor
Satisfaction

Purpose of Visit

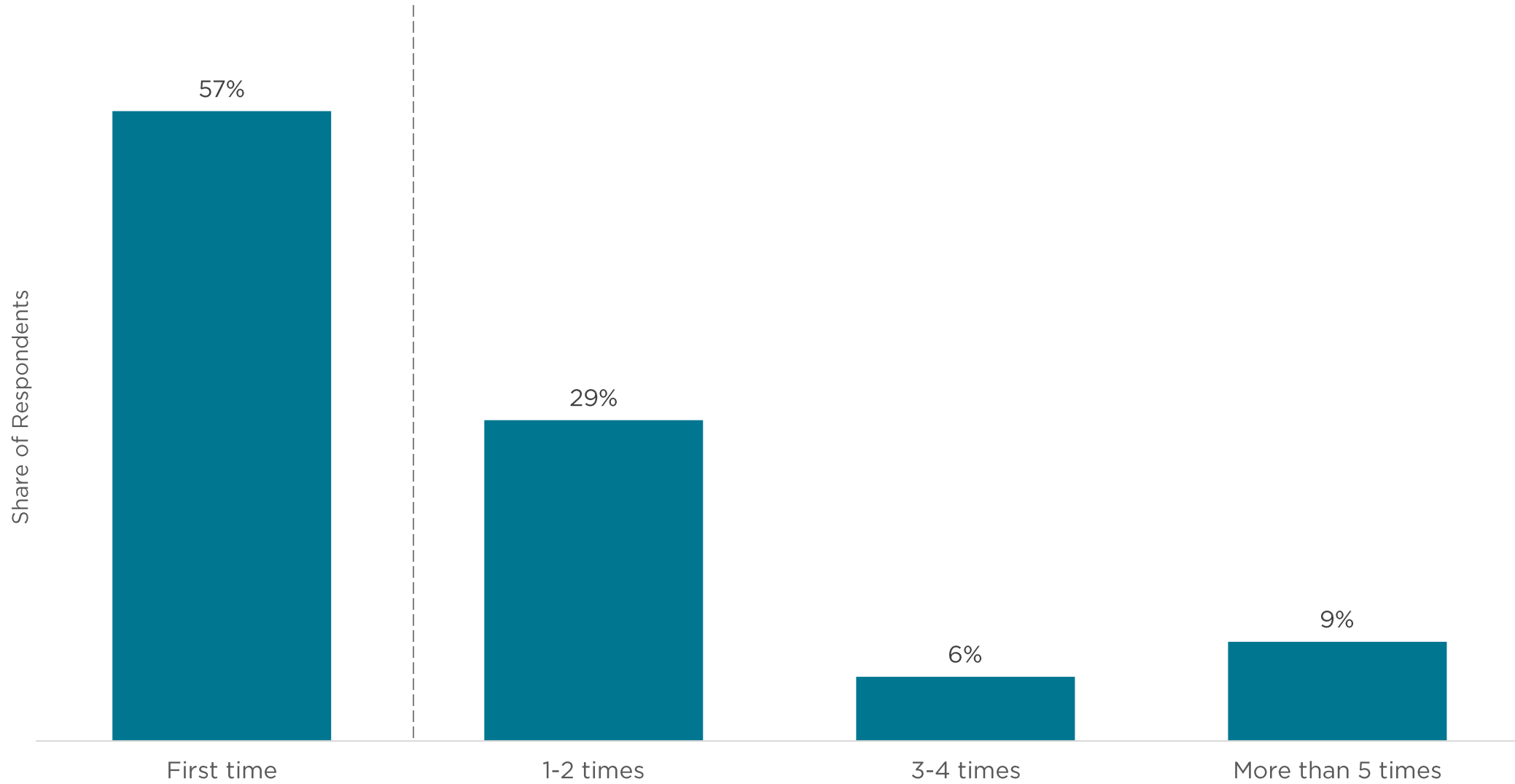
Q: What was the main purpose of your visit?



Note: N=1,876. Due to rounding, total does not sum to 100%

Previous Visits

Q: How many times have you been to the Cook Islands not including this recent visit??

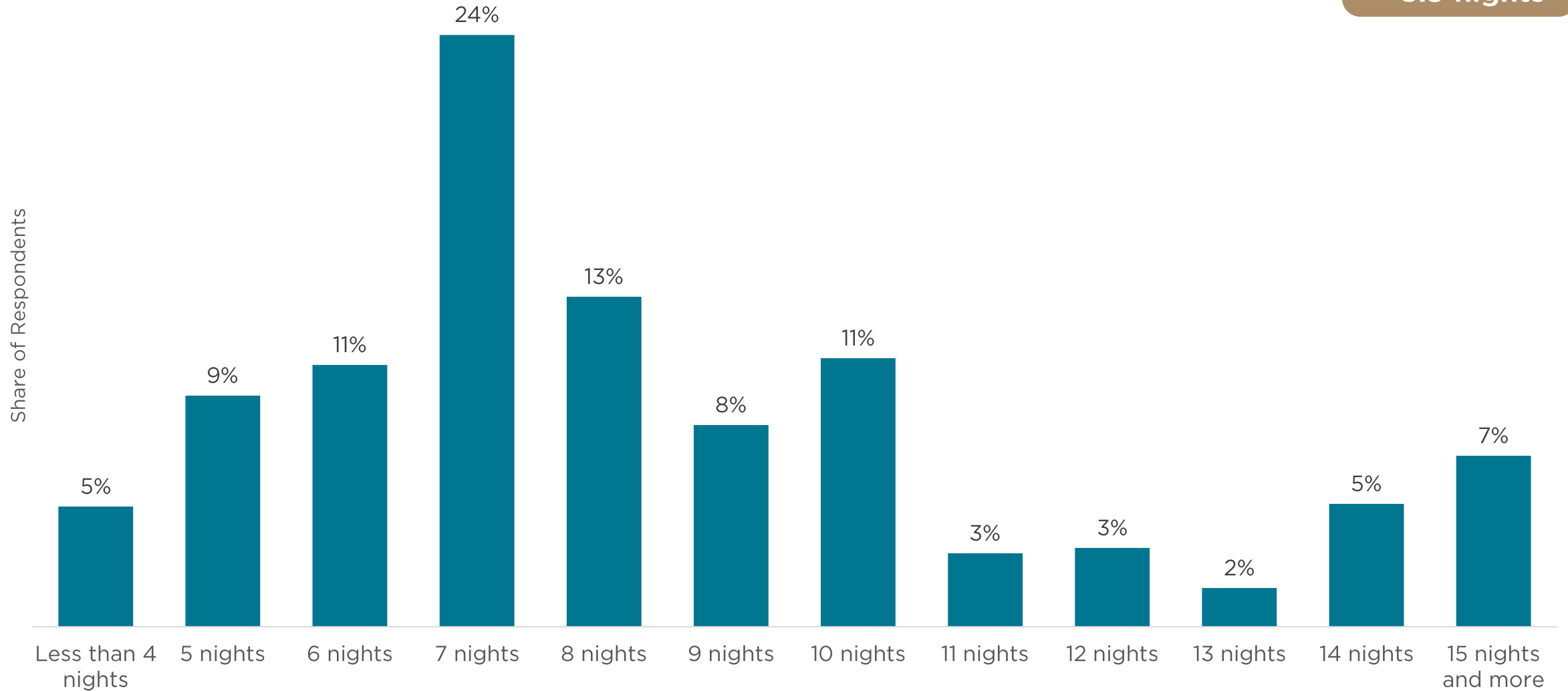


Note: Due to rounding, total does not sum to 100%.

Length of Stay (nights)

Q: How many nights did you spend in Cook Islands?

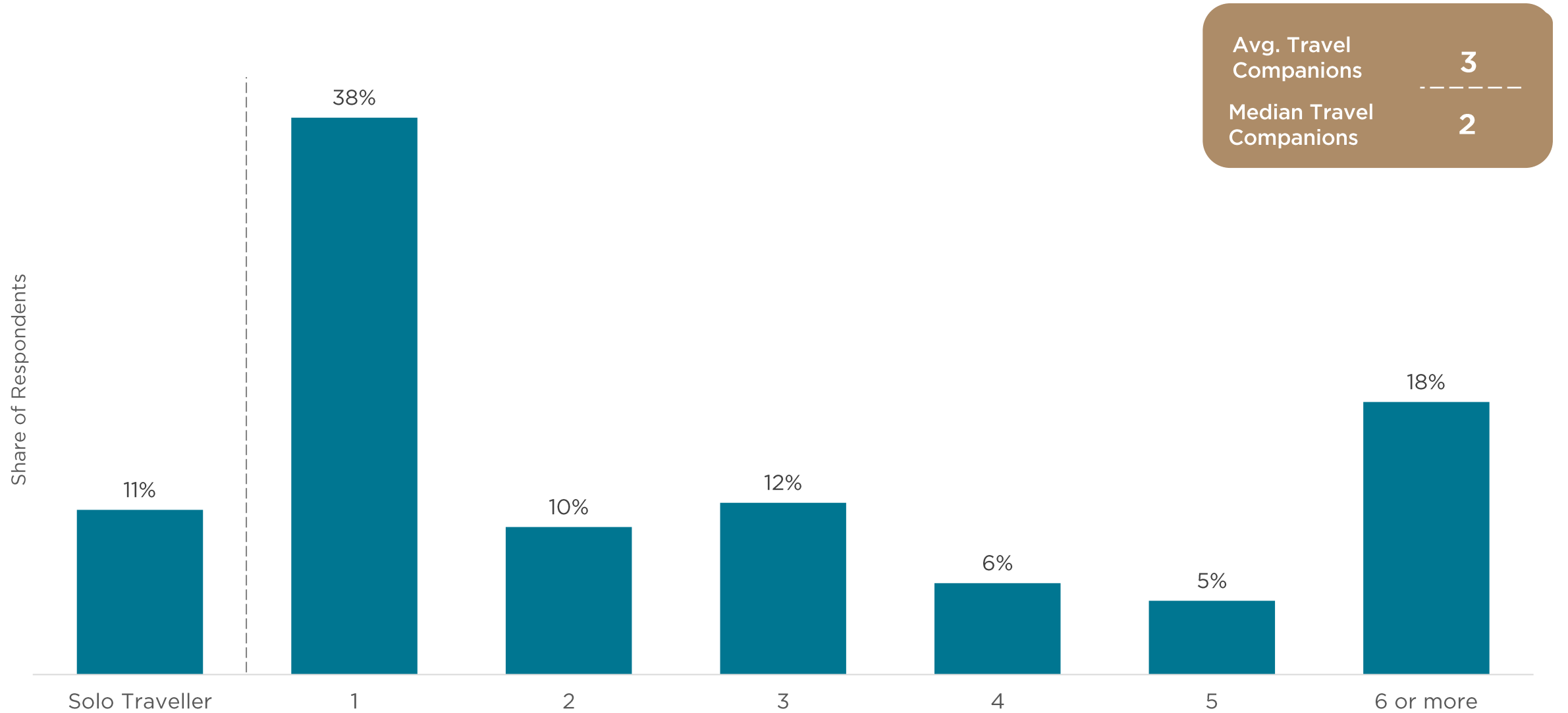
Avg. Length of Stay
8.9 nights



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

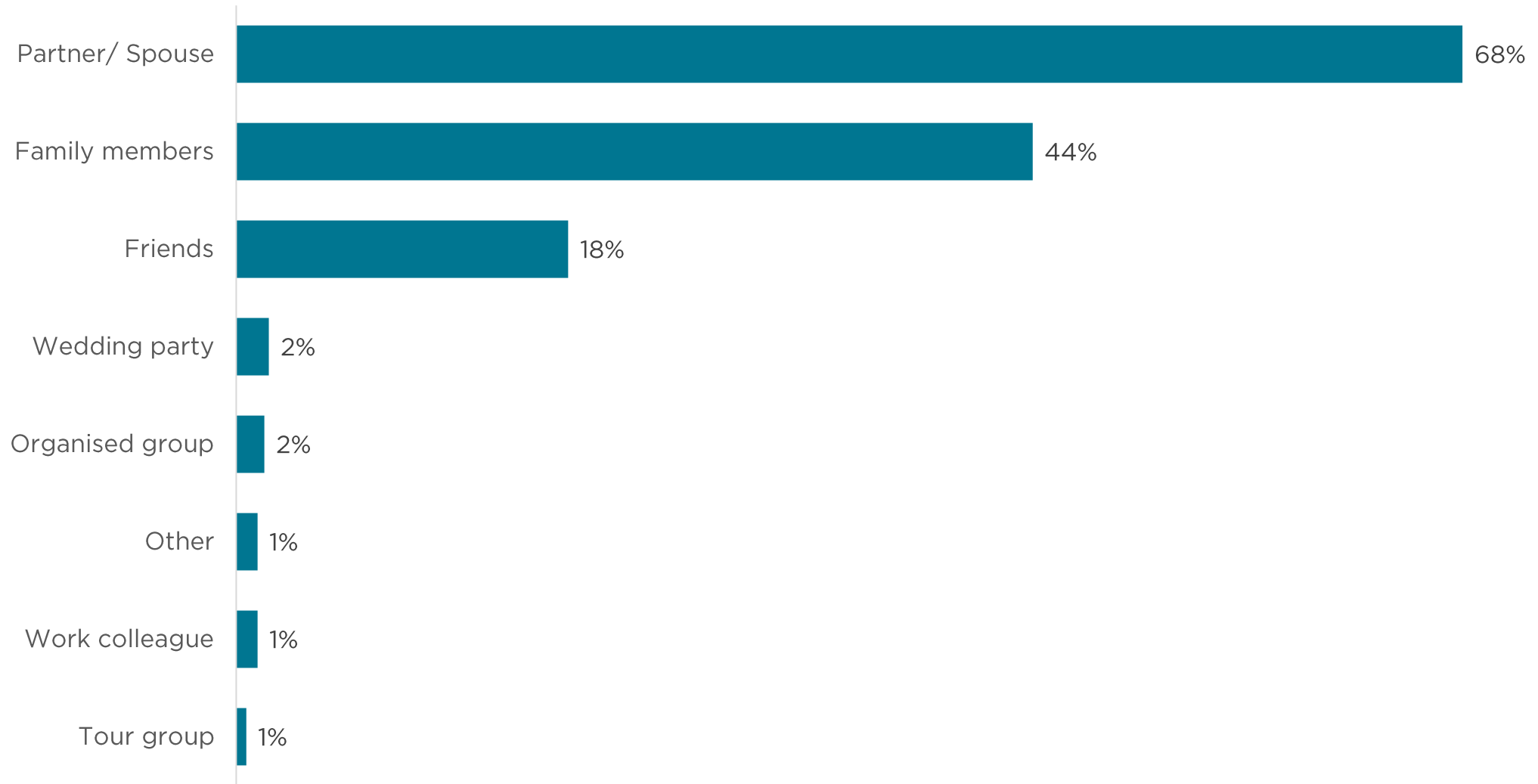
Travel Group Size

Q: How many people accompanied you on this trip?



Note: N=1,873. Due to rounding, total does not sum to 100%

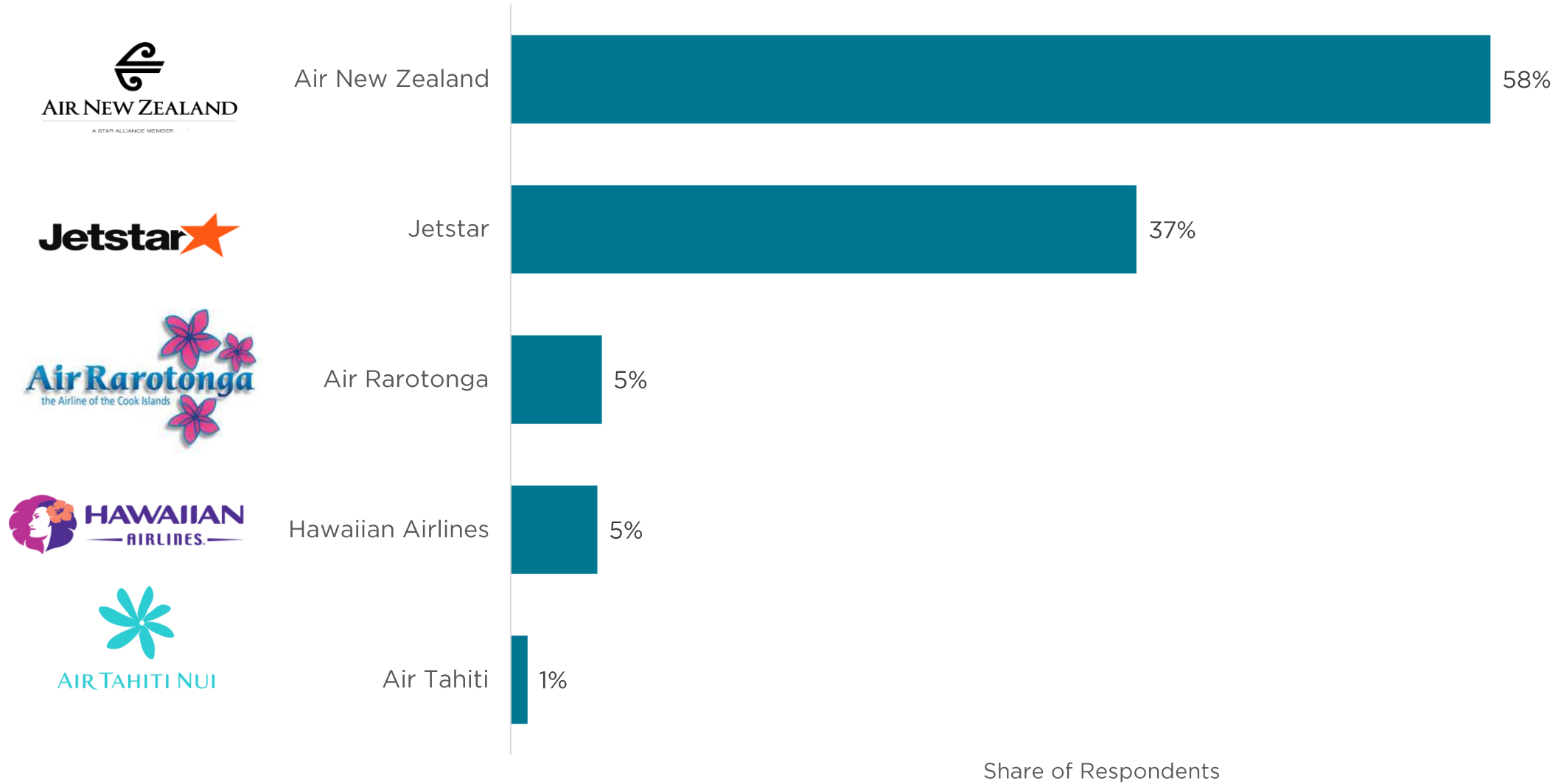
Travel Companions



Share of Respondents

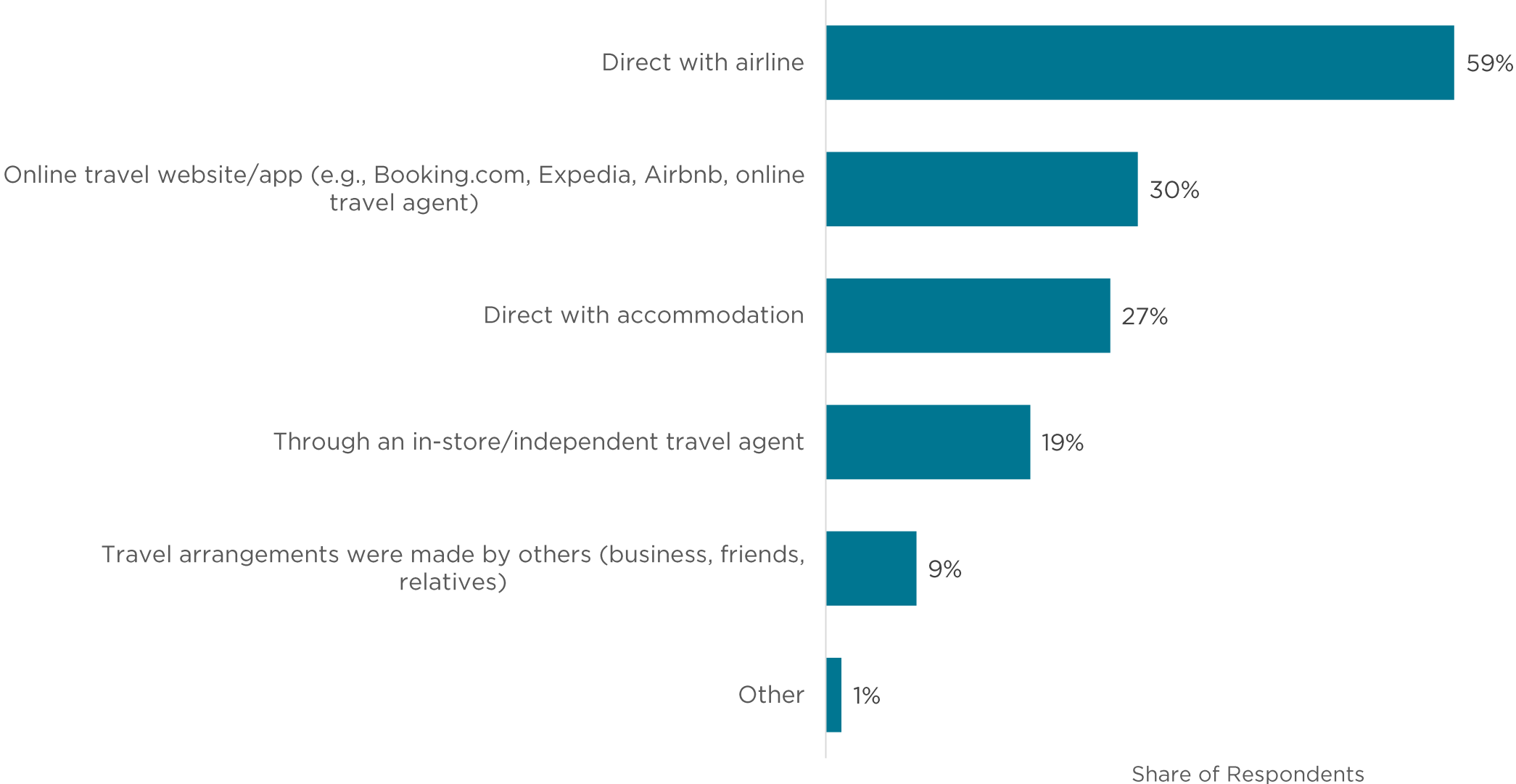
Note: Multiple responses, therefore total does not add up to 100%

Airlines Used for Travel



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%

Islands Visited & Avg. Length of Stay

Avg. Length of Stay
8.9 Nights

Q: Which island(s) did you visit?

Q: How many nights did you spend on each island you visited?

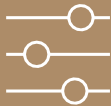


Note: Multiple responses, therefore total does not add up to 100%.

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



Visitor Spending
& Impact

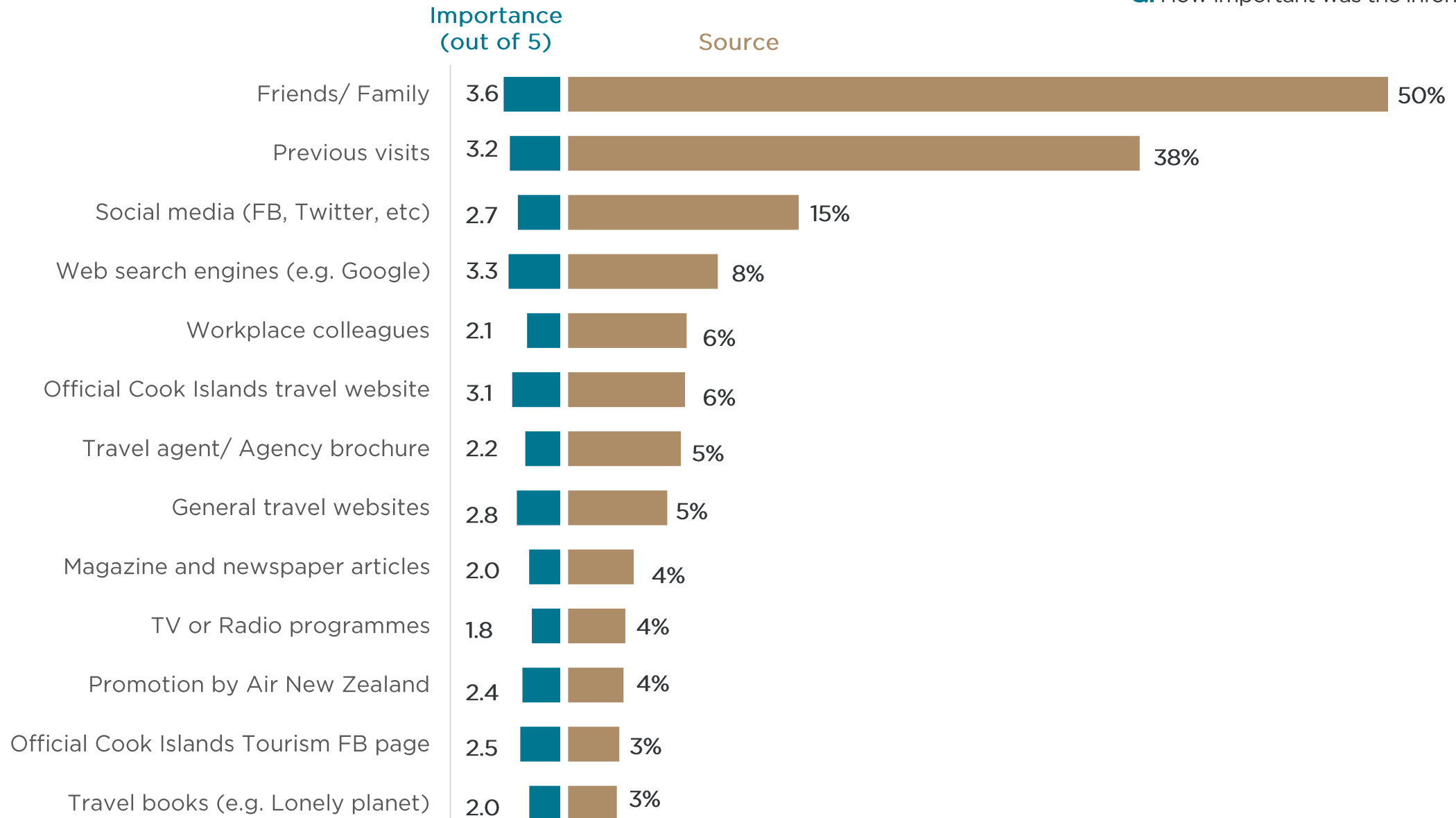


Visitor
Satisfaction

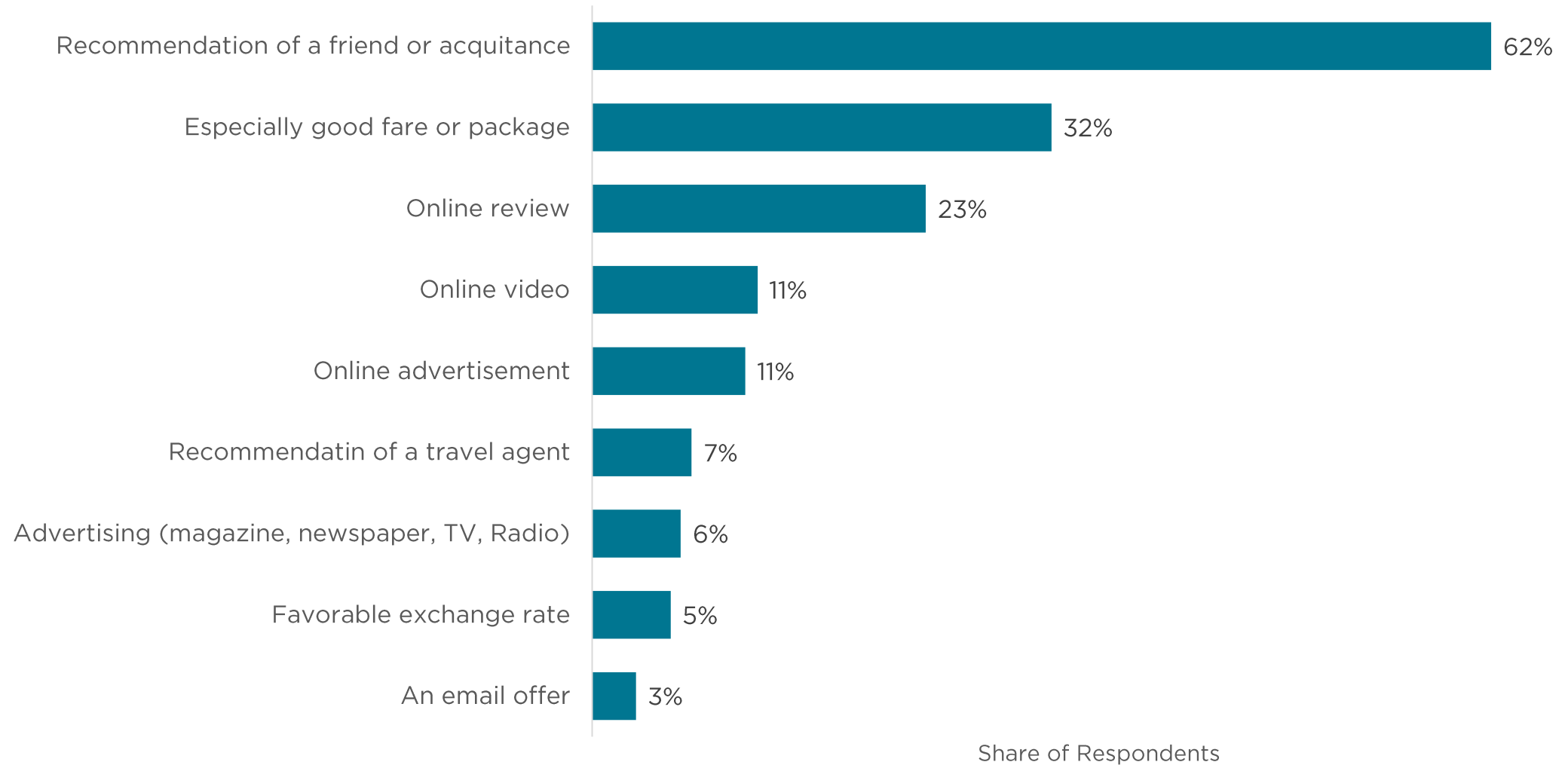
Information Source

Q: How did you find out about Cook Islands as a destination?

Q: How important was the information source?

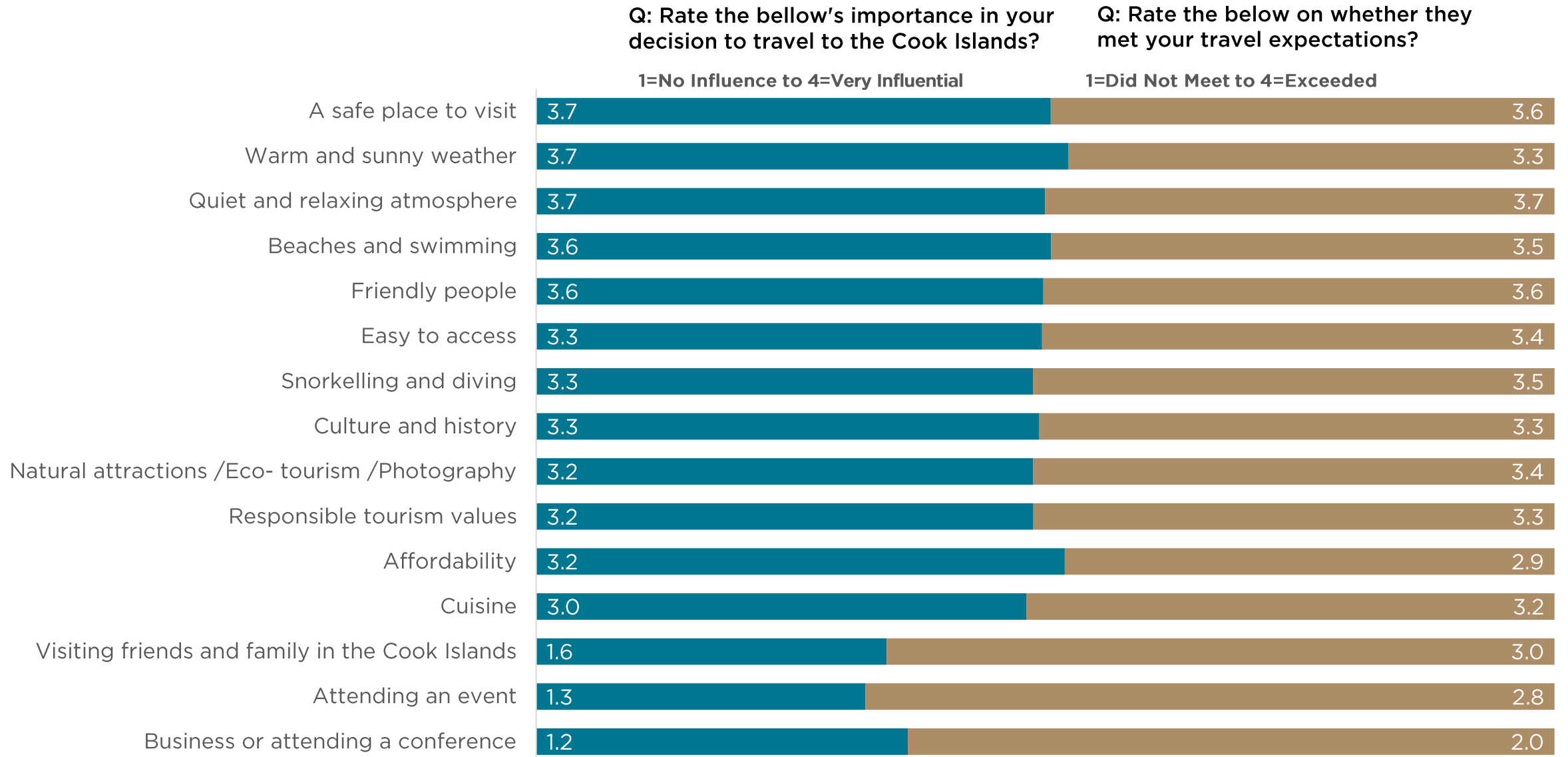


Important Promotion/ Advertising Channels that assisted in selecting to visit the Cook Islands



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

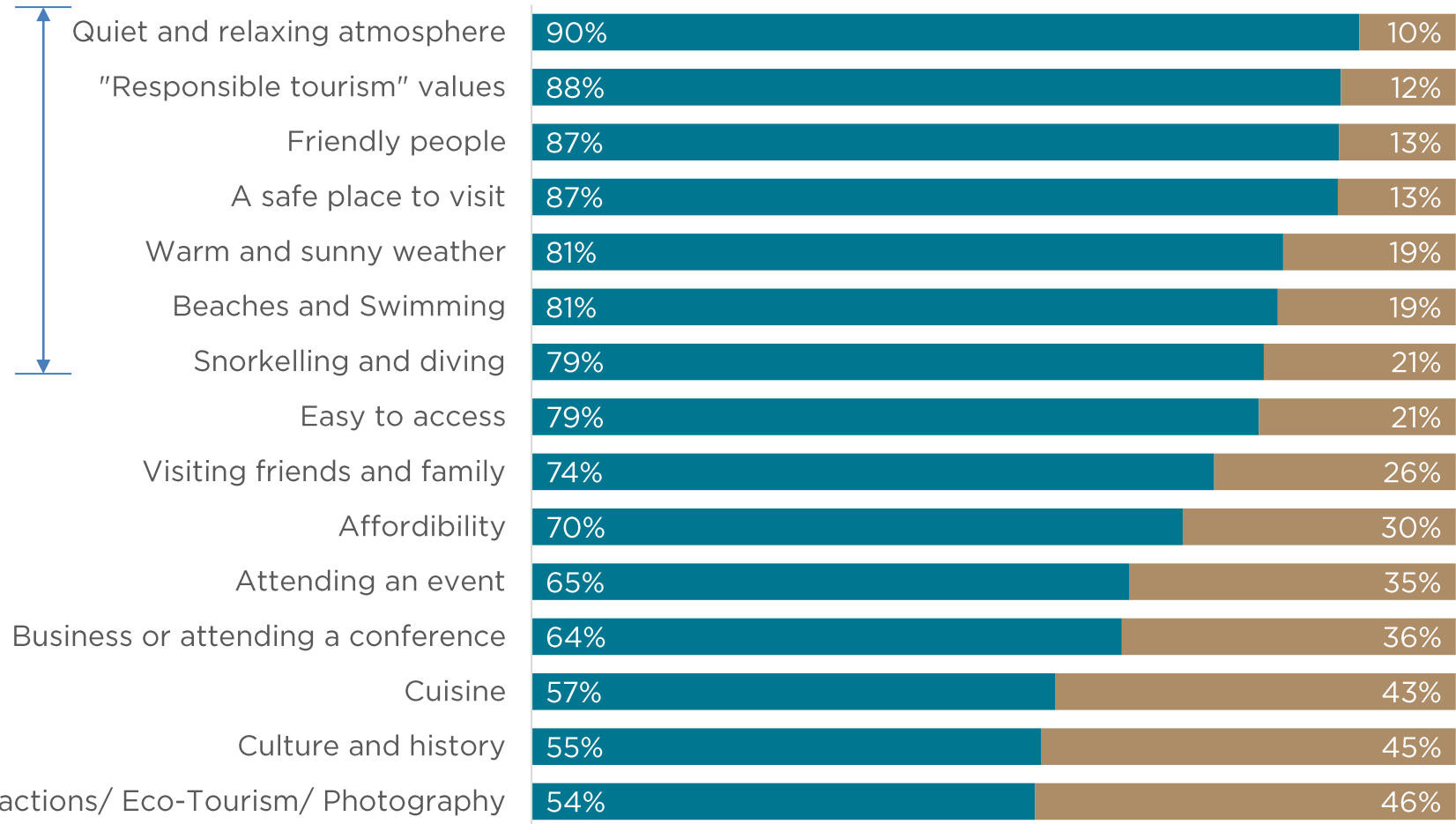
Pre-Travel Perceptions Vs Expectations



Unique Selling Points: Cook Islands vs Competitors (based on Visitor Perceptions)

Q: Please attribute each statement below to the country, Cook Islands or Alternative Destination, that best represents its unique appeal

Top
8



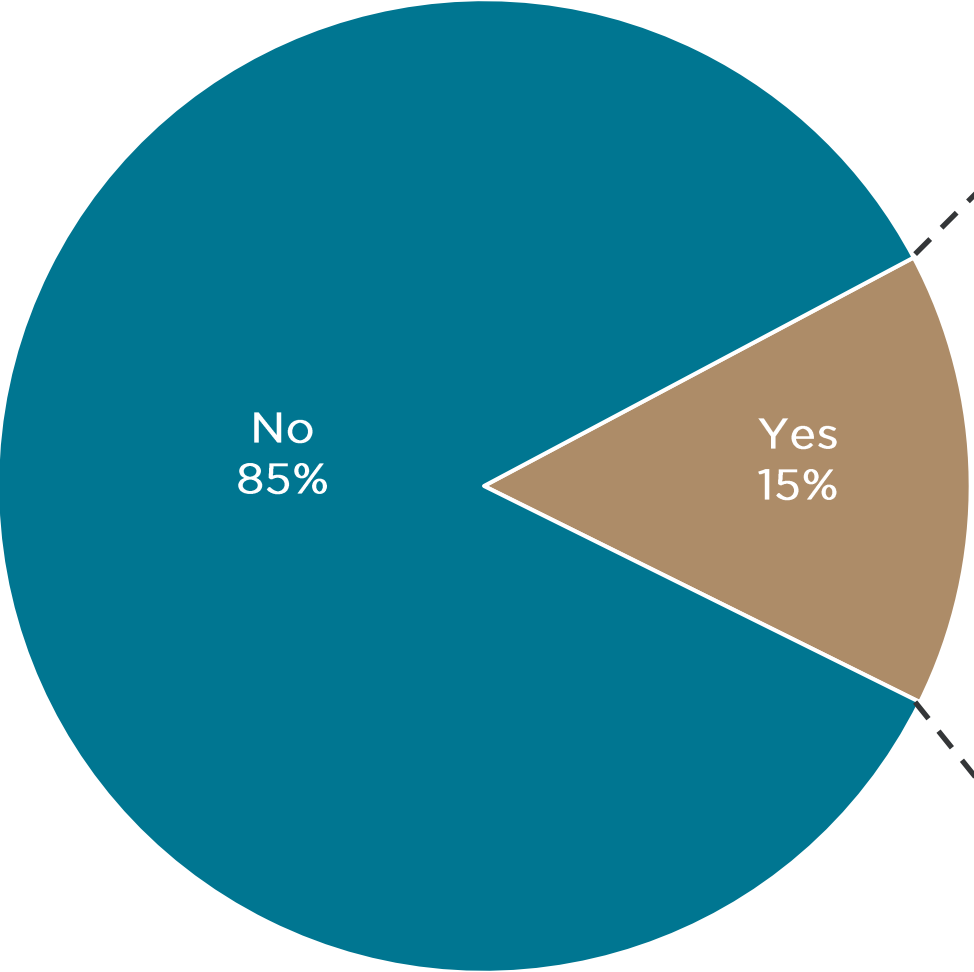
Bottom 6
It would be beneficial to place additional emphasis on these Unique Selling Points, as visitors are increasingly comparing them to those of the Cook Islands.

■ % of Respondents that chose the Cook Islands ■ % of Respondents that chose Other Destinations

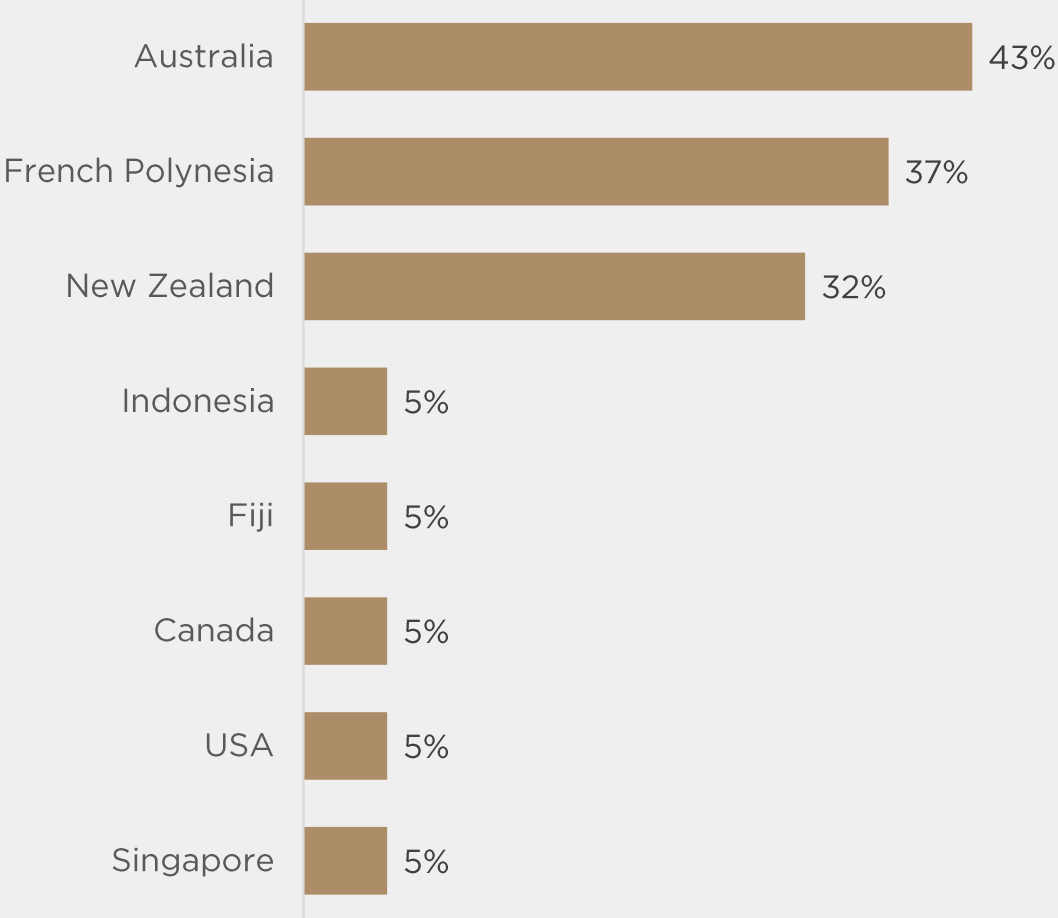
Note: New variables for 2023.

Other Considered Destinations

Q: When planning your trip, were there other destinations you were also contemplating but ultimately chose the Cook Islands?



Q: If Yes, choose at most 3 destinations you considered



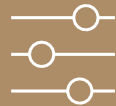
Share of Respondents

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

Report Structure



Visitor Profile



Visitor
Characteristics
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Information &
Decision Making



Visitor Spending
& Impact

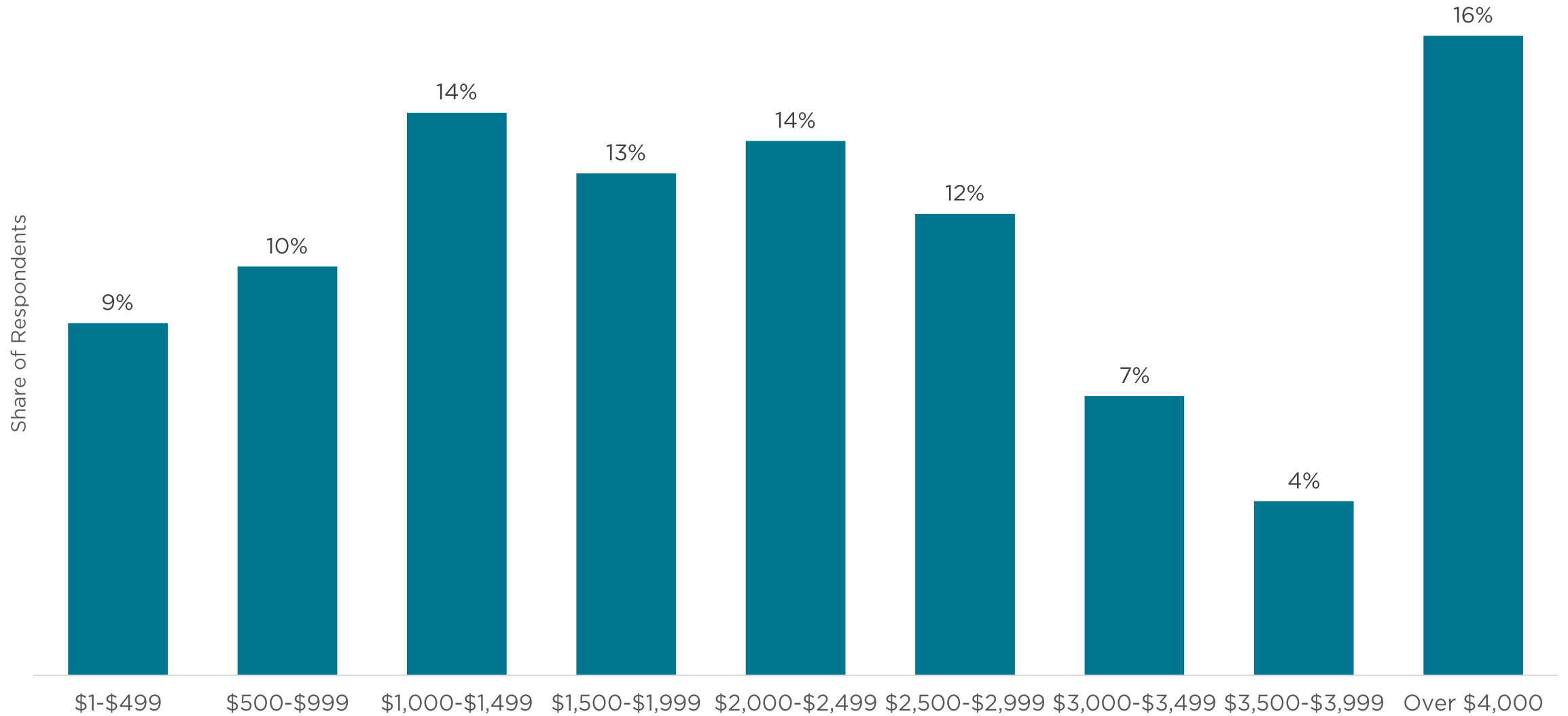


Visitor
Satisfaction

Prepaid Expenditure

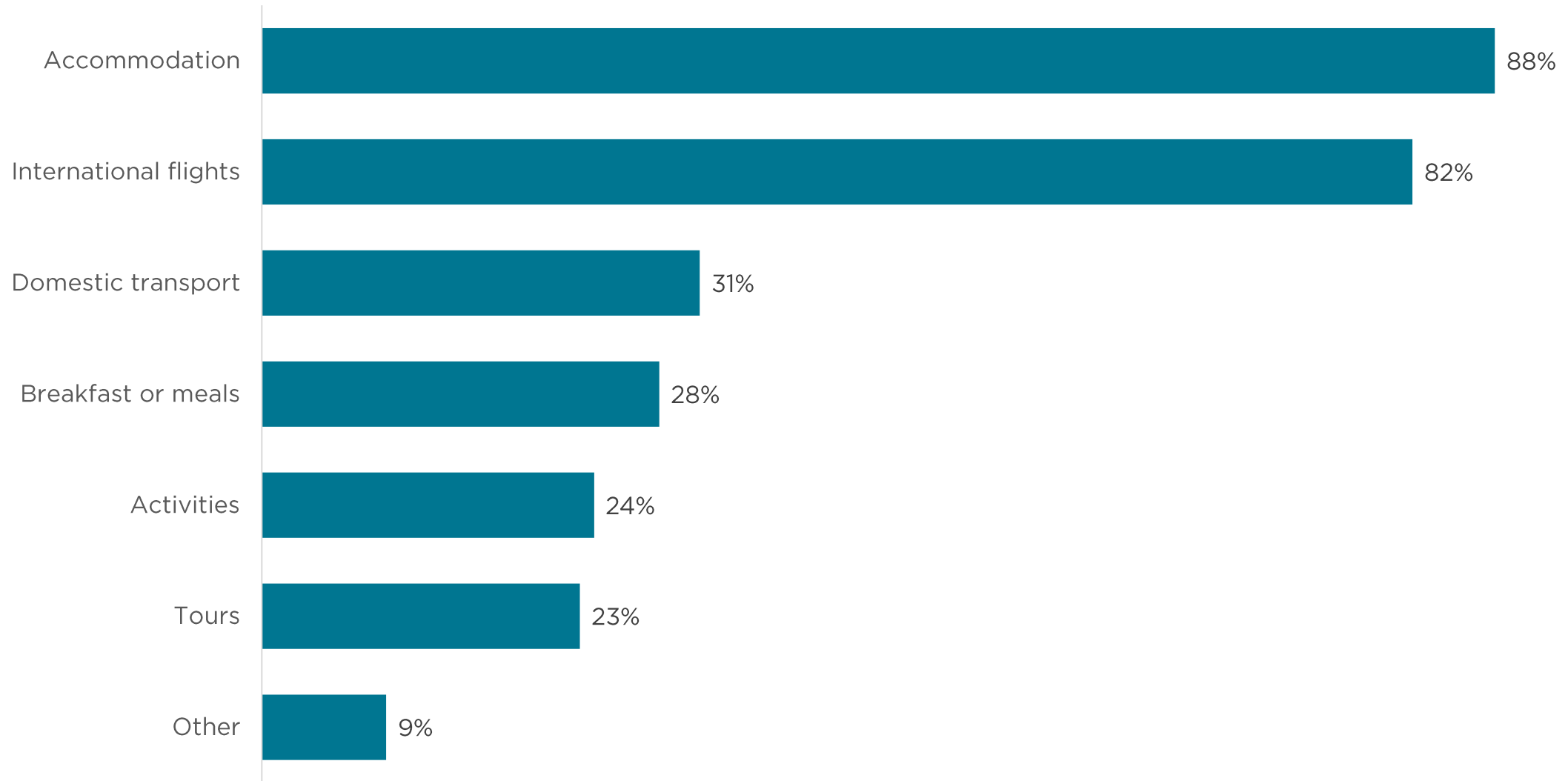
Avg. Prepaid per Person
per Trip

NZ\$2,462



Note: NZ dollars.

Prepaid Items



Share of Respondents

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

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

	Local Spend Per Person Per Day		
	<u>% of sector</u>	<u>NZD</u>	<u>USD</u>
Accommodation	41	100	25
Restaurant, Cafes & Bars	20	48	29
Vehicle Rental	7	16	10
Petrol	1	3	2
Domestic Flight	8	20	12
Public Transport	1	1	0.6
Internet Cost	1	2	1
Water-based activities	4	10	6
Land-based activities	2	6	4
Groceries	5	13	8
Shopping	8	19	11
Other	3	7	4
TOTAL	100	247	113

Note: Total Economic Impact-Per Trip and Per Day are per-person expenditures and can be used to estimate the total economic impact, through extrapolating to the total number of visitor arrivals during the surveyed period.

Economic Impact - Per Person and Total

	Visitor Expenditure Per Person & Total	
	Jul23-Jun24	Jul23-Jun24
	NZD	USD
Average Spend Prior to arrival		
Per Person Per Trip	2,462	1,501
<i>Flowing into local economy rate - estimated 40%</i>		
Per Person Per Trip	984	600
Per Person per Day	110	67

Average Local Spend		
<i>Length of Stay (nights)</i>	<i>mean 8.9 nights</i>	
Per Person Per Trip	2,197	1,339
Per Person per Day	247	150

Total Economic Impact-Per Trip	3,182	1,939
Total Economic Impact-Per Day	357	217

July 2022 – June 2023

NZD 357 MILLION

FROM VISITORS 127,340

 PREPAID EXPENDITURE

 IN-COUNTRY SPEND

\$2,476

Prepaid per visitor per trip

\$204

In-country spend per day

40% Flowing into local economy rate

X 8.9 nights Average length of stay

\$989

Prepaid per visitor per trip

\$1,814

In-country spend per trip

 ECONOMIC IMPACT

\$2,803 per visitor per trip

\$315 per visitor per day

July 2023 – June 2024

NZD 520 MILLION

FROM VISITORS 163,522▲

 PREPAID EXPENDITURE

 IN-COUNTRY SPEND

\$2,462 ▼

Prepaid per visitor per trip

\$247 ▲

In-country spend per day

40% Flowing into local economy rate

X 8.9 nights = Average length of stay

\$984 ▼

Prepaid per visitor per trip

\$2,197 ▲

In-country spend per trip

 ECONOMIC IMPACT

\$3,181 per visitor per trip ▲

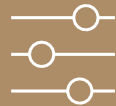
\$357 per visitor per day ▲

Note: NZ dollars. All amounts are per person

Report Structure



Visitor Profile



Visitor
Characteristics
& Preferences



Information &
Decision Making



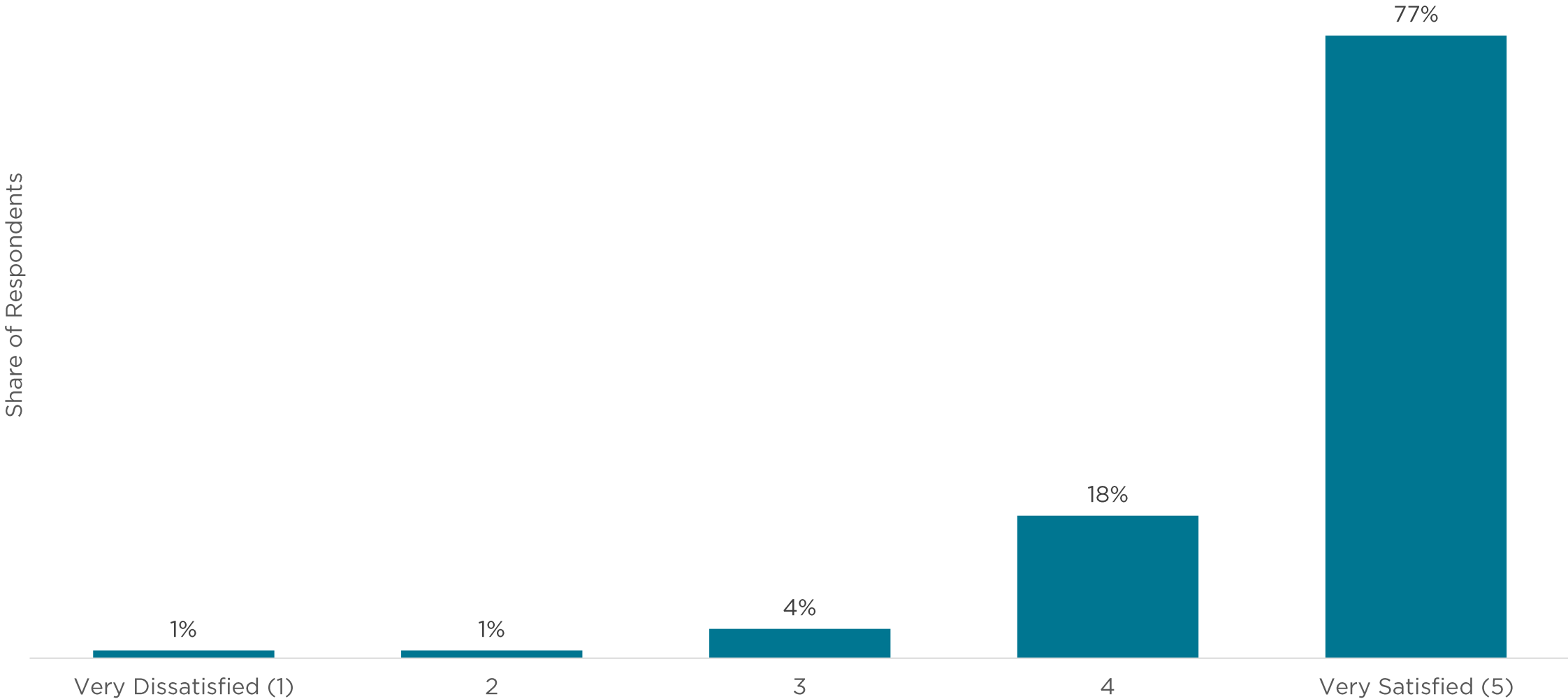
Visitor Spending
& Impact



Visitor
Satisfaction

Visitor Overall Satisfaction

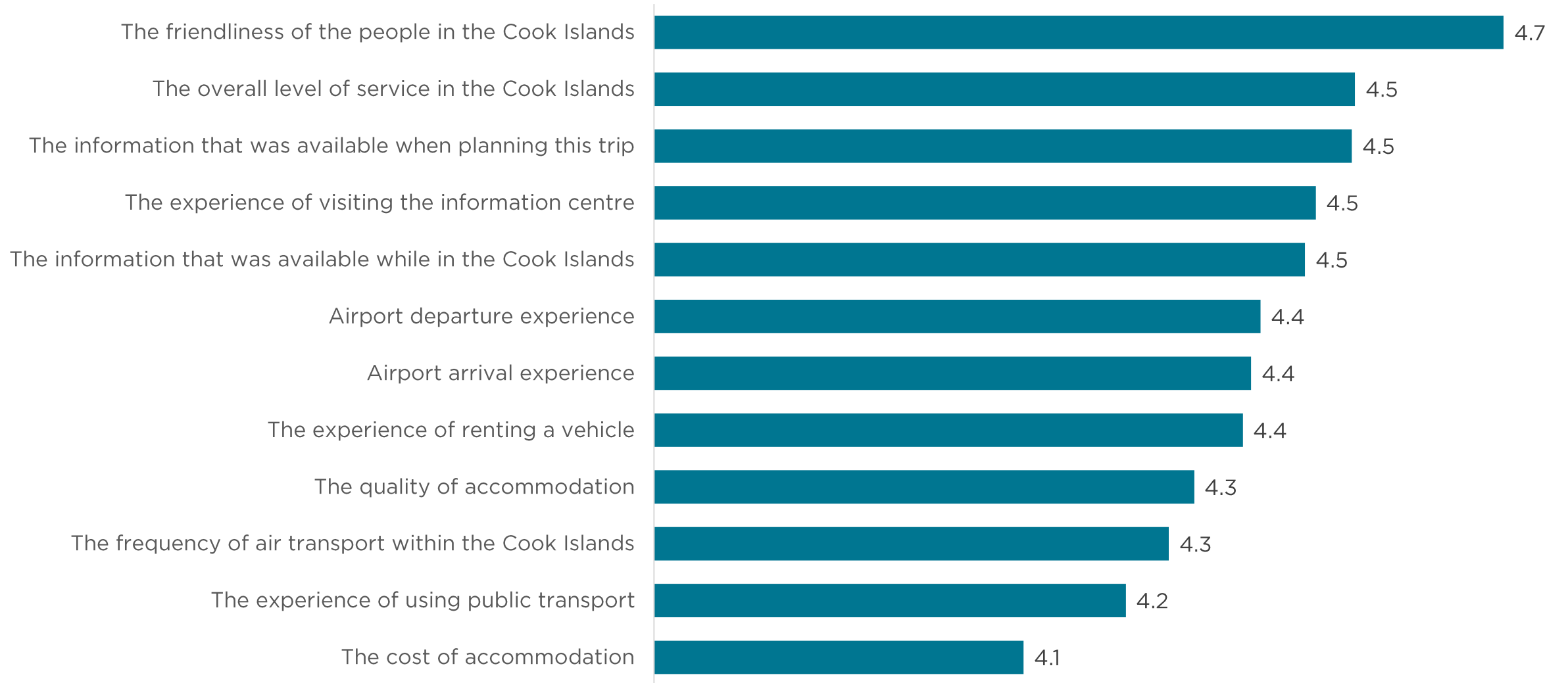
Avg. Overall Satisfaction
4.7



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

Satisfaction with Travel Experience

Q: How satisfied were you with the following?

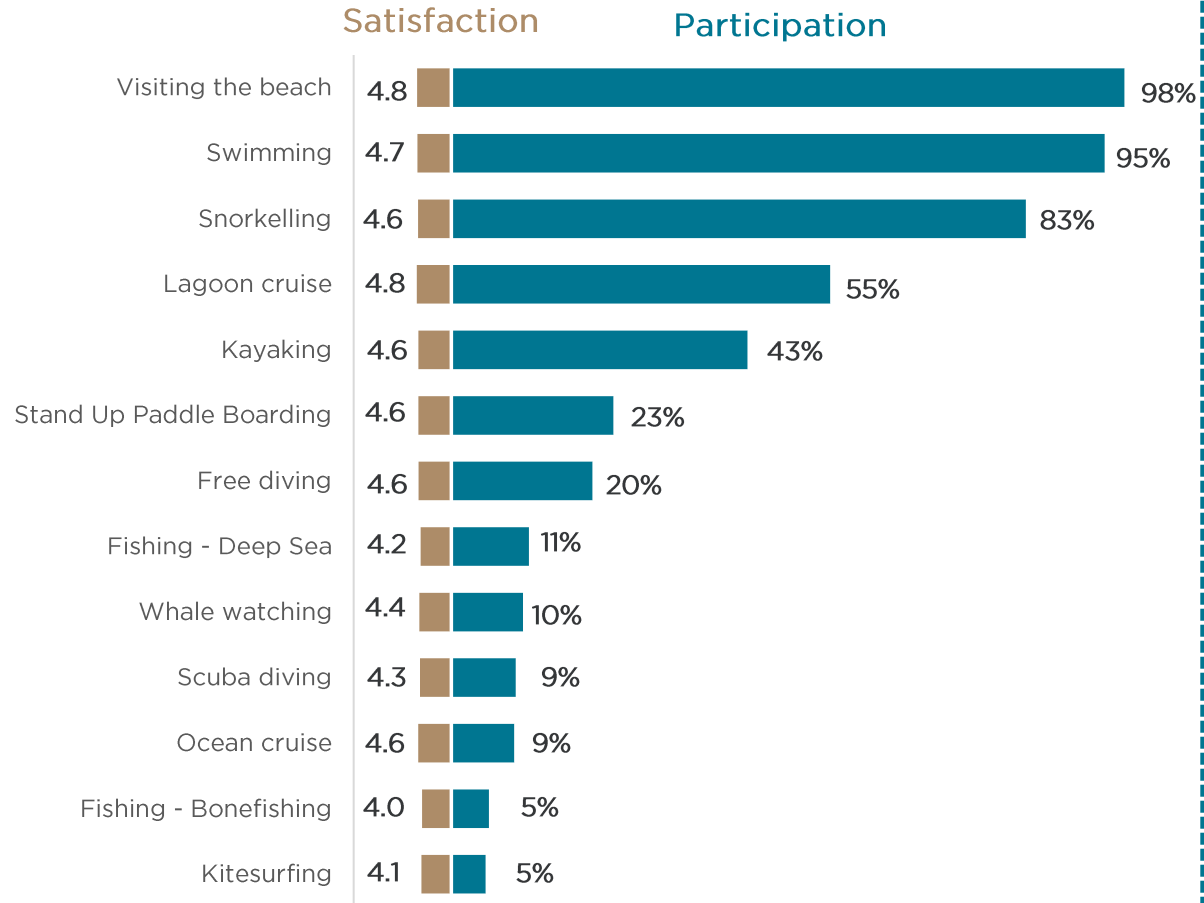


Scale: 1-Very Dissatisfied to 5-Very Satisfied

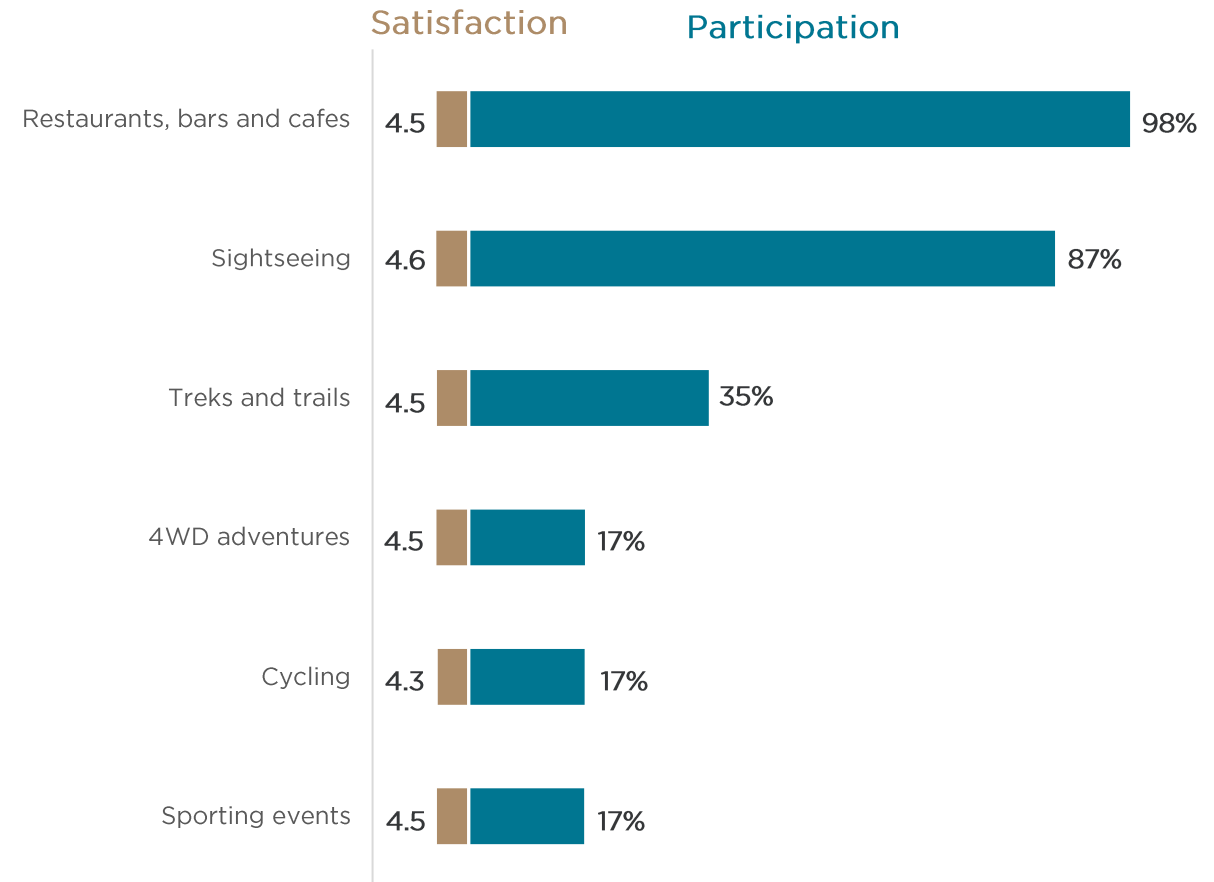
Satisfaction with Activities

Q: How satisfied were you with the following?

Water-based activities



Land-based activities

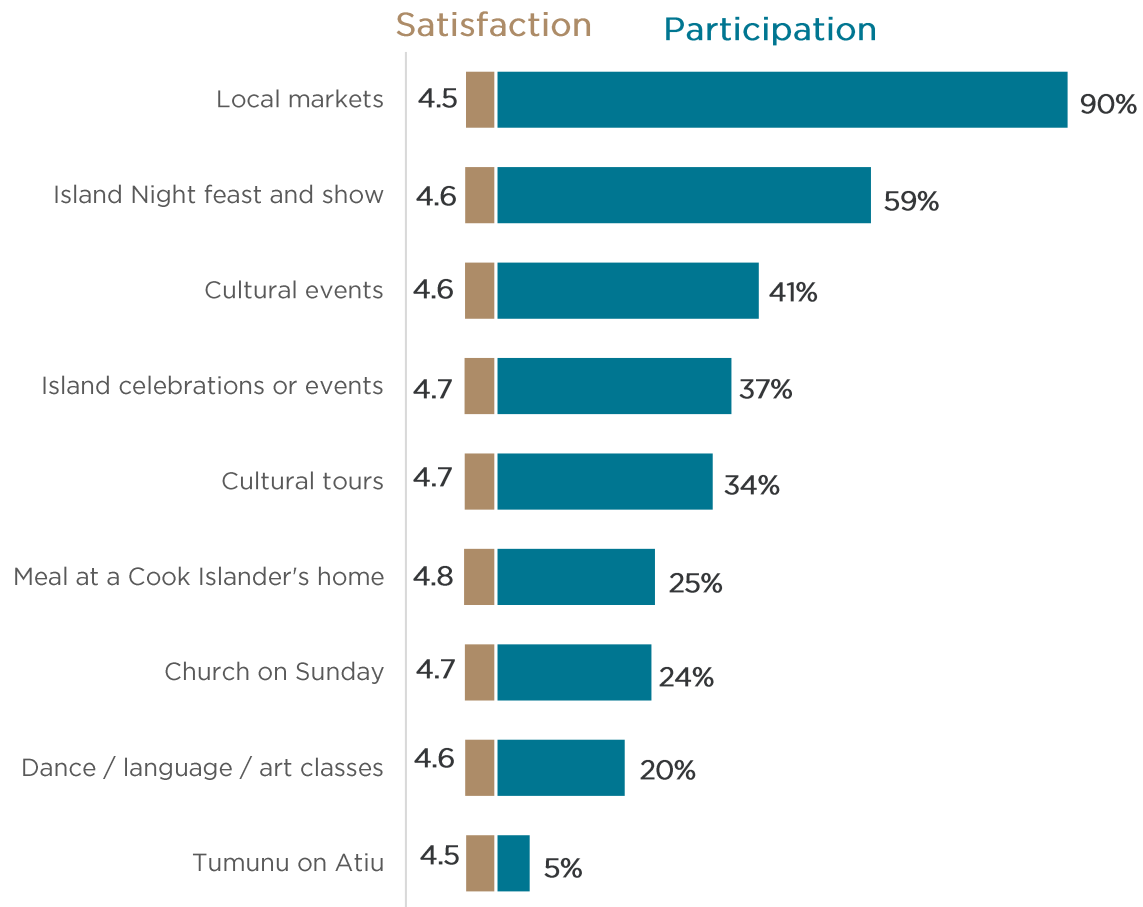


Note: Multiple responses, therefore total does not add up to 100%

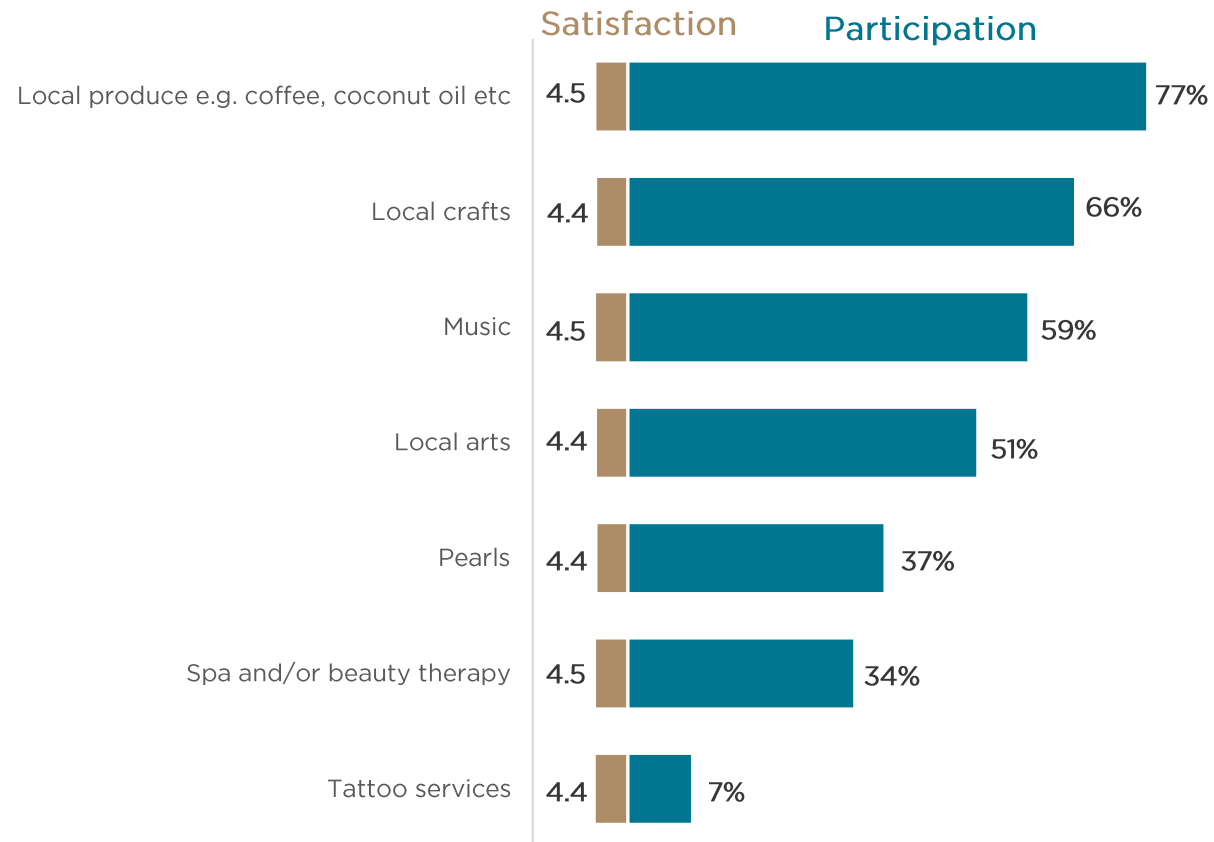
Satisfaction with Activities

Q: How satisfied were you with the following?

Arts and Cultural Activities



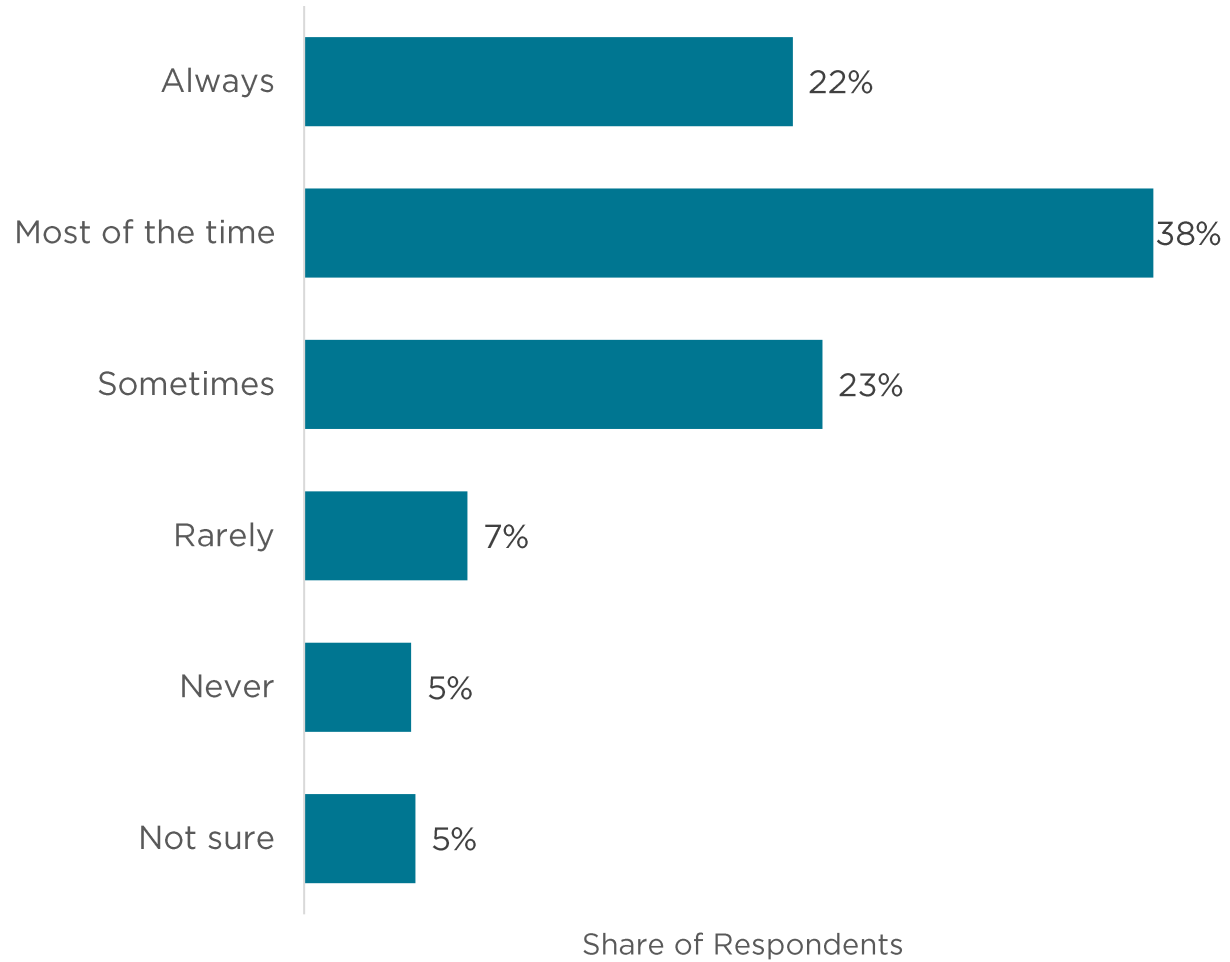
Shopping activities



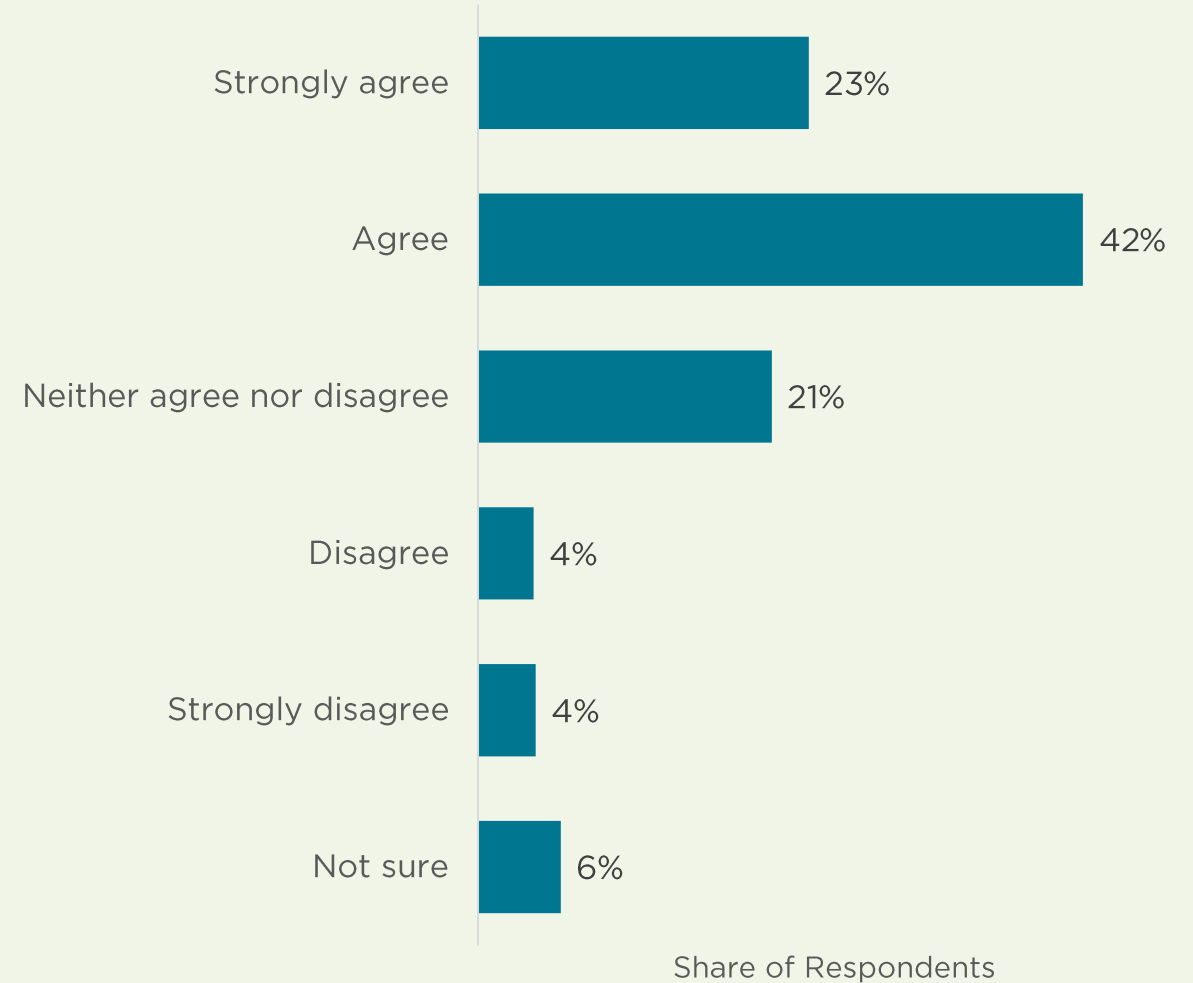
Note: Multiple responses, therefore total does not add up to 100%

Socio-Cultural and Environmental Awareness

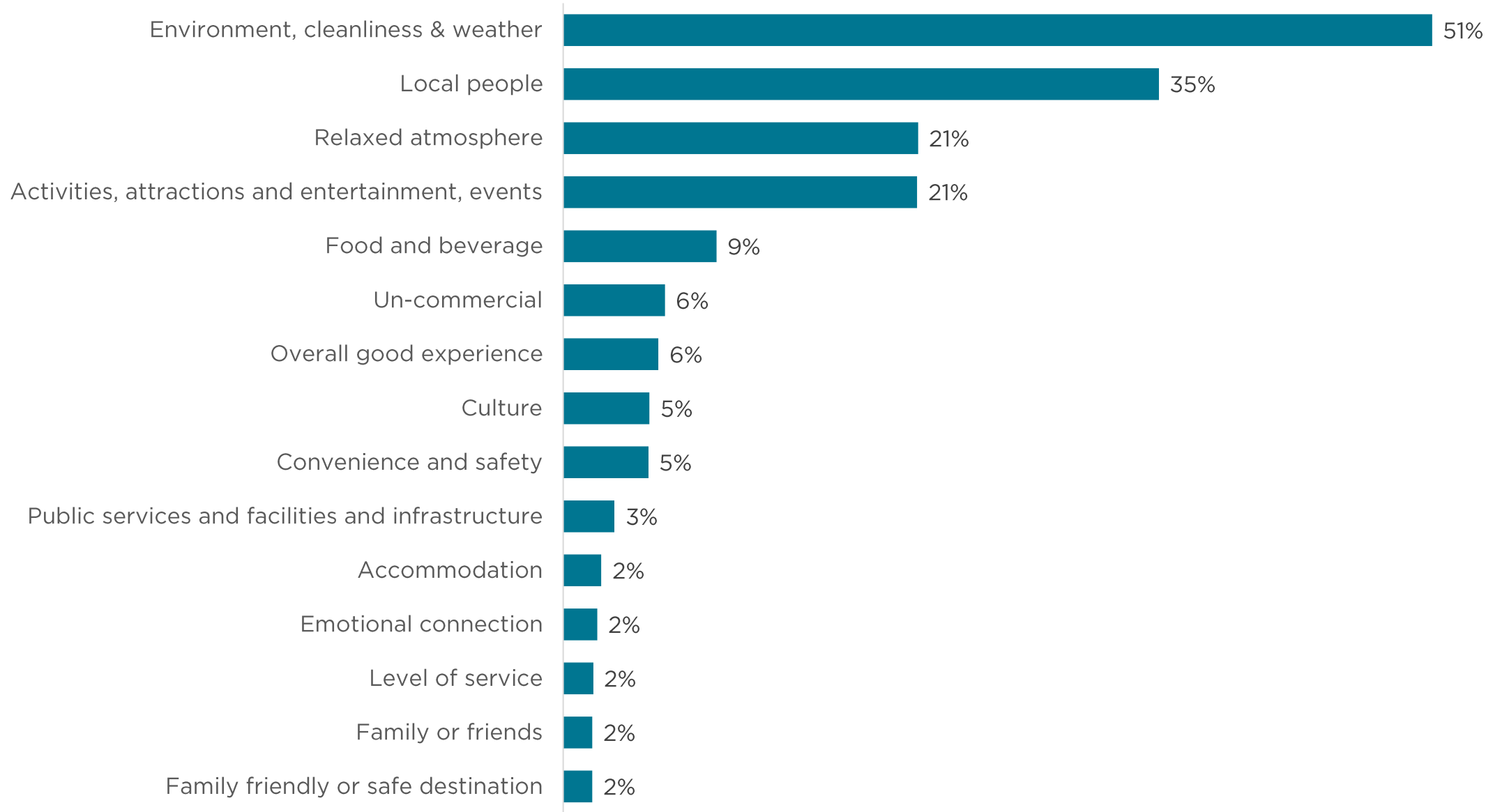
Q: During your trip to the Cook Islands, to what extent did you take sustainability, which includes the environment, the local community, and the culture, into account when deciding what activities to do, things to buy, or services to use?



"I am willing to contribute to a tourist visitor levy aimed at supporting social, environmental, and cultural regeneration in the Cook Islands, because I believe that tourism can have a positive impact, and I want to be part of the solution"



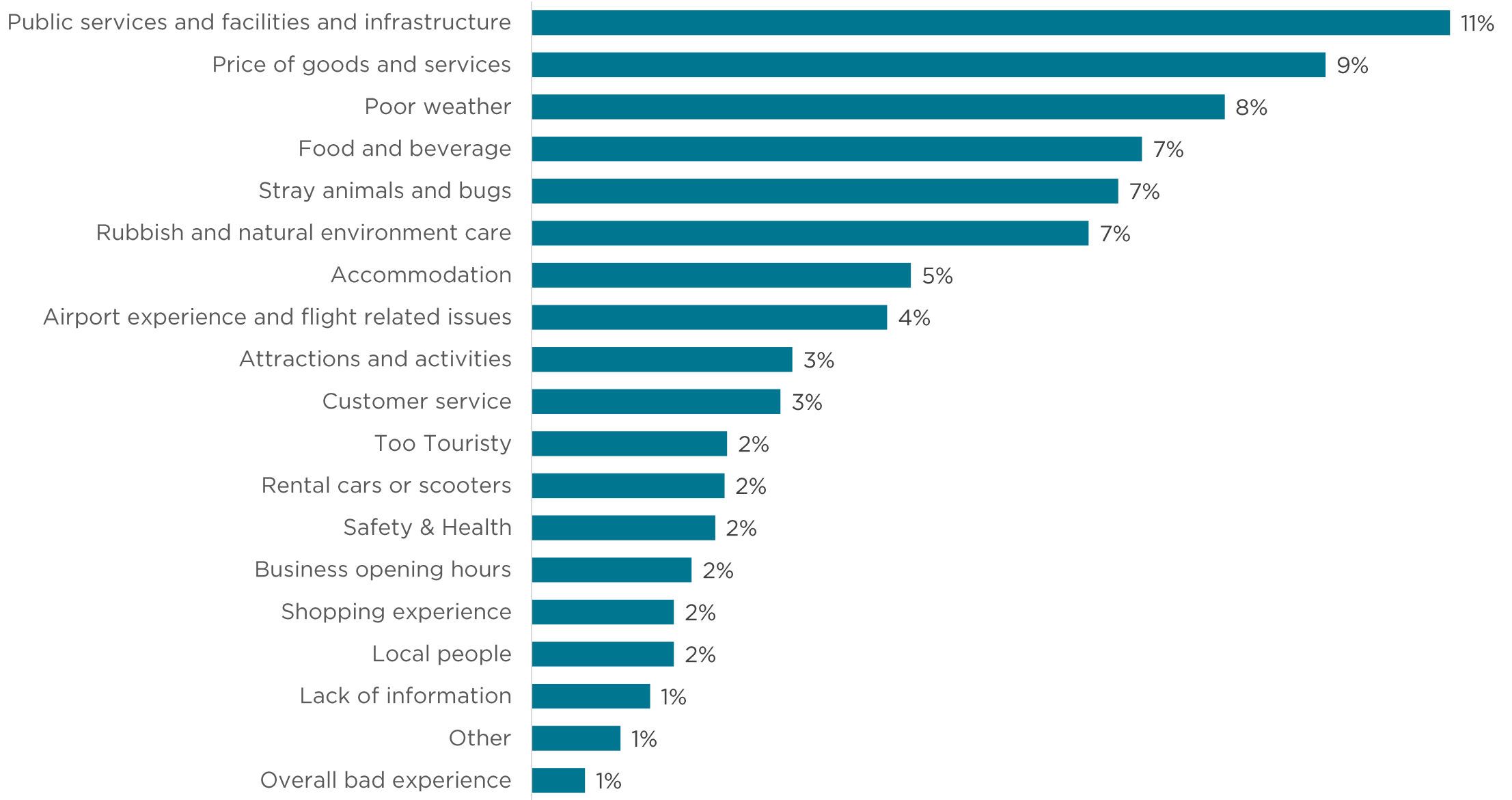
Most Appealing Aspects



Share of Respondents

Note: Total response N=1,524. Multiple responses, therefore total does not add up to 100%

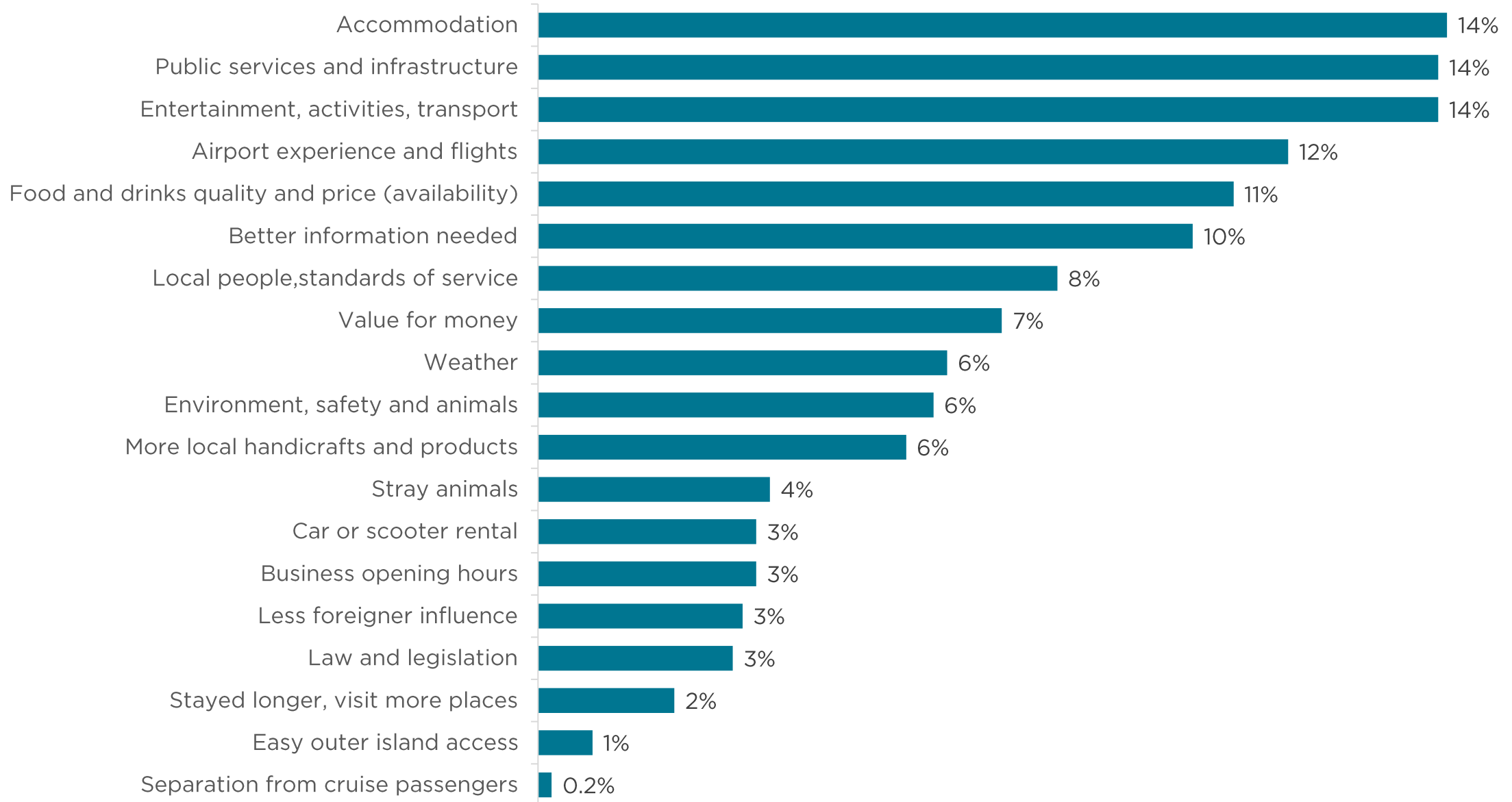
Least Appealing Aspects



Share of Respondents

Note: Total response N=1,416. Multiple responses, therefore total does not add up to 100%

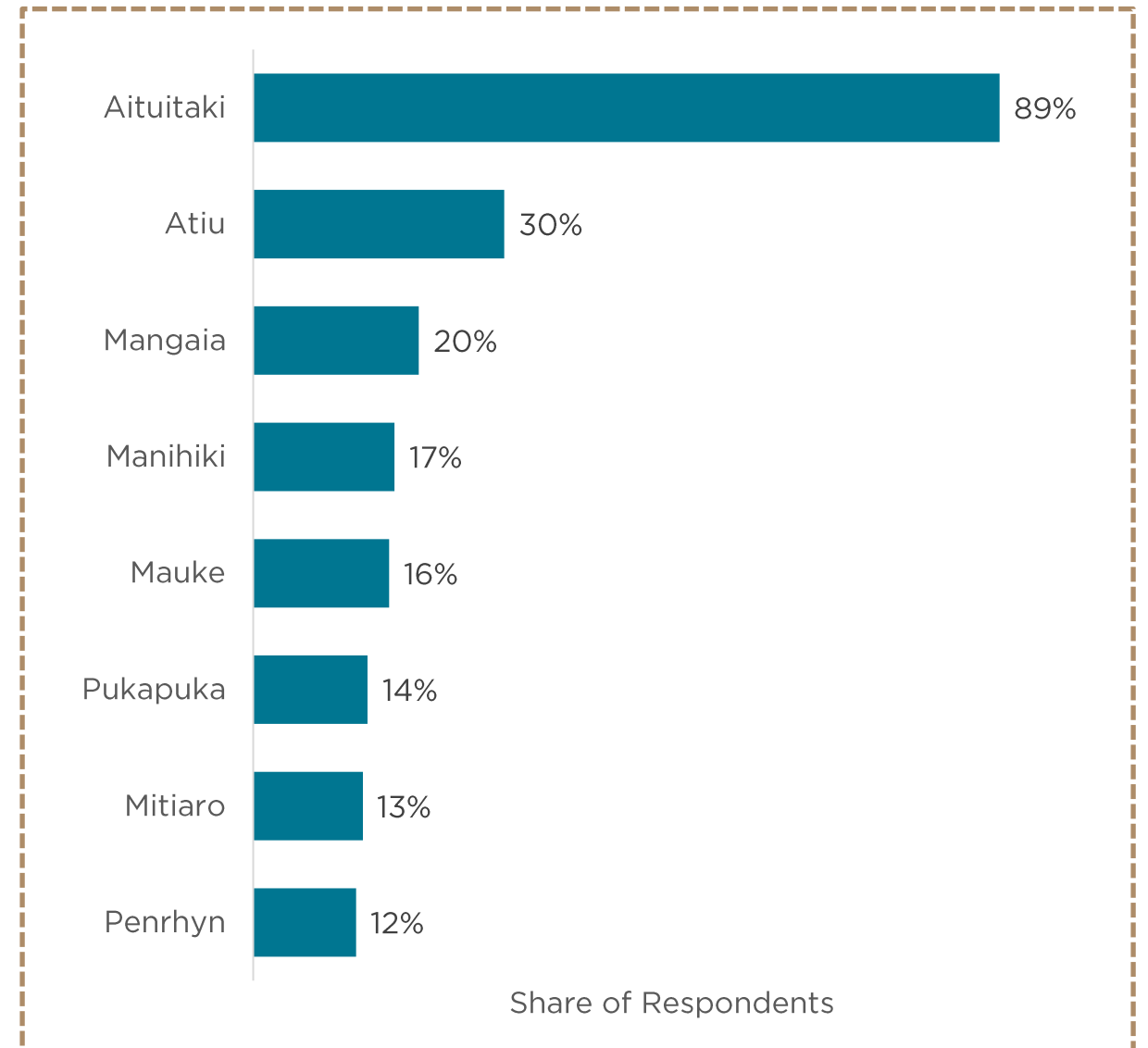
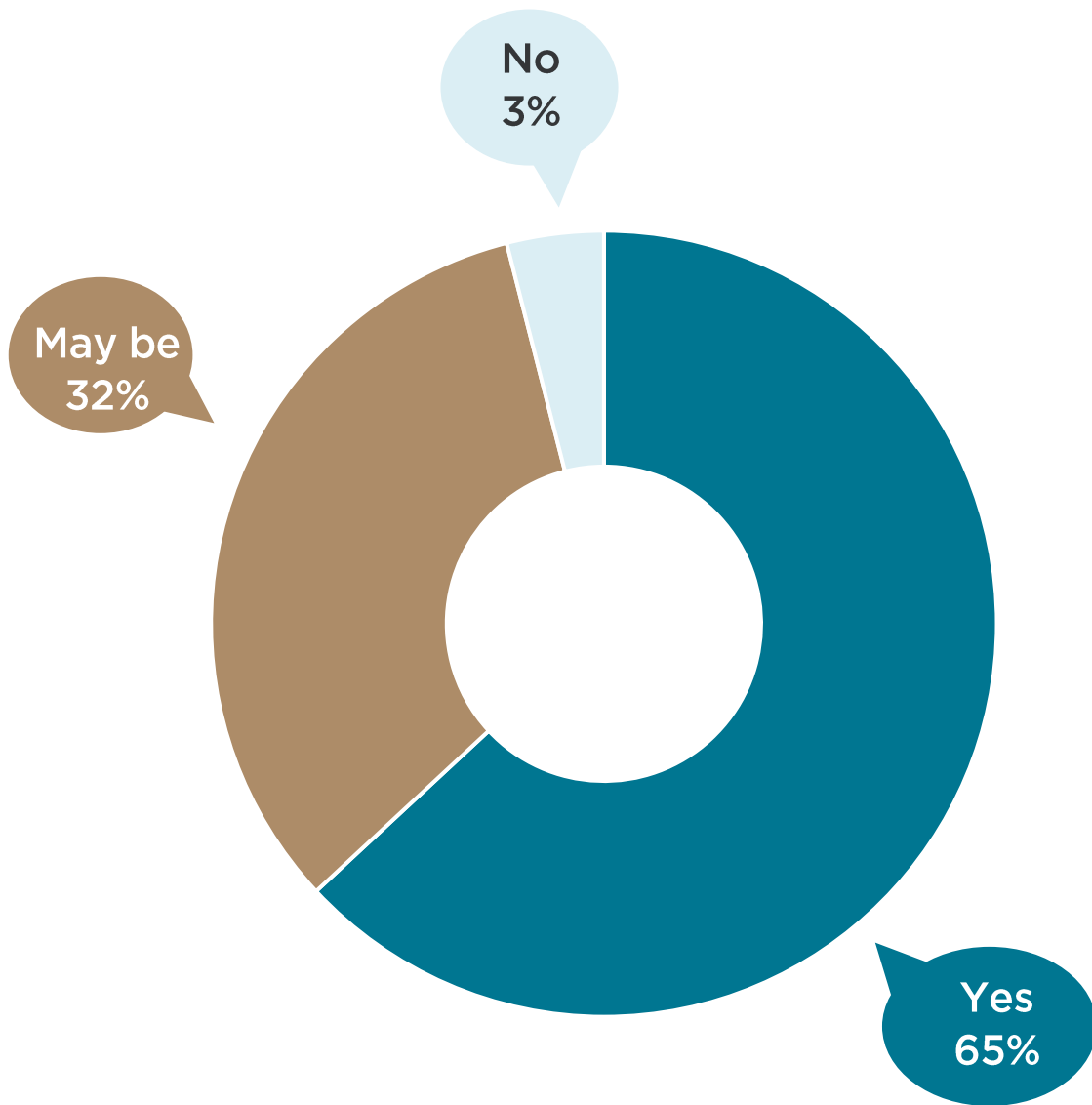
Suggestions for Improvement



Share of Respondents

Note: Total response N=476. Multiple responses, therefore total does not add up to 100%

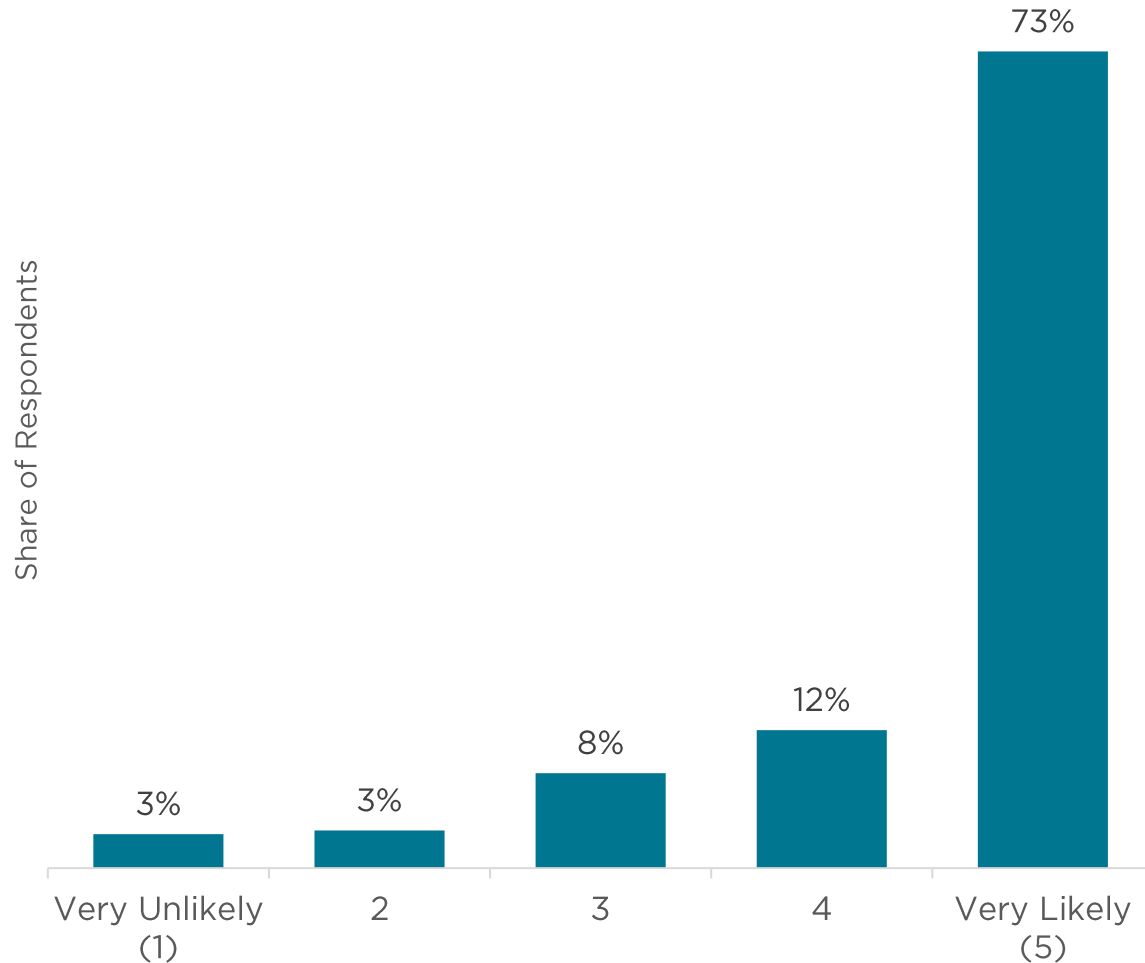
Willingness to Visit Outer Islands



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

Future Motivations

Q: How likely would you return to the Cook Islands?

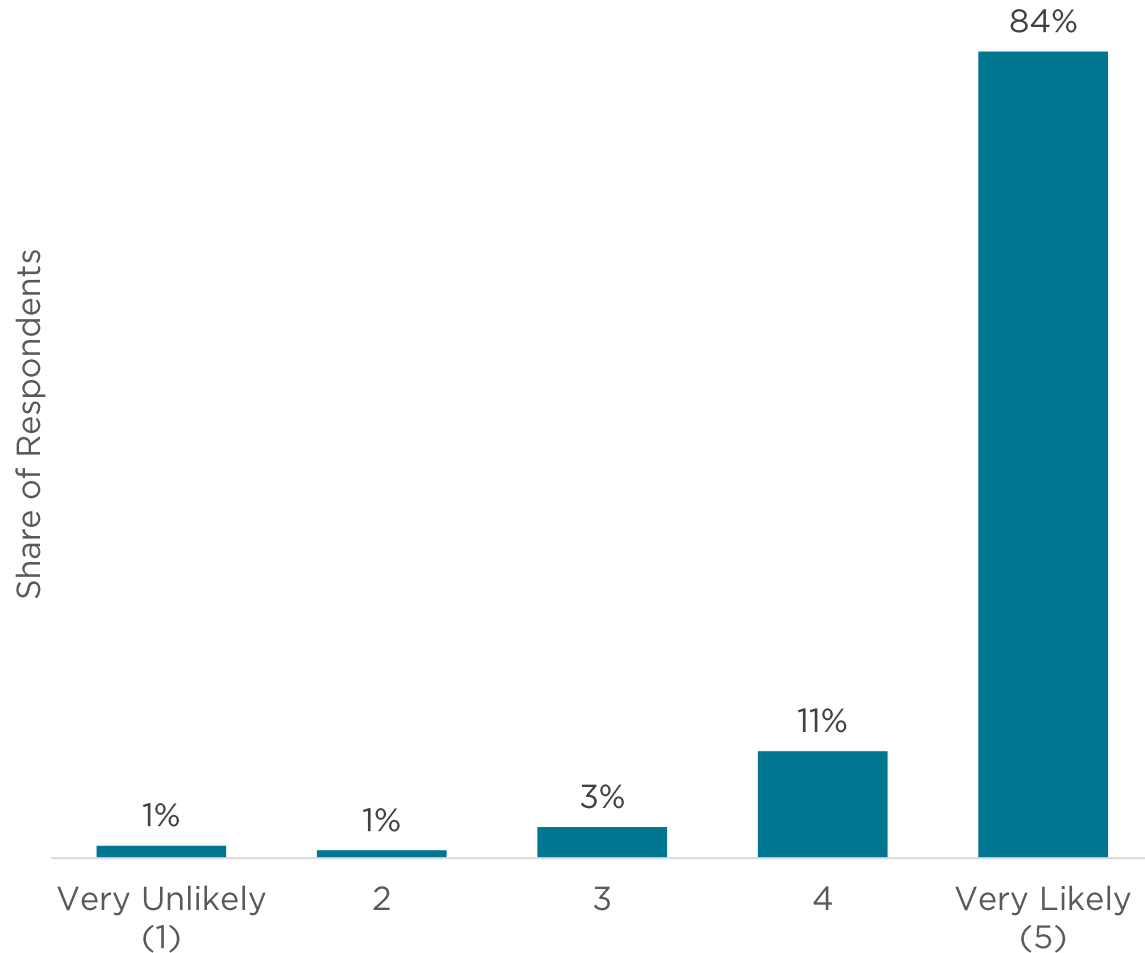


Quotes: Reasons to not return

- + *We have been to Cook Islands so many times it is always our first choice. I have advised so many friends to visit I give everyone a mini map etc. I basically market the Cooks but last time our departing flight was delayed by 6hrs which meant arrival in Auckland at 1am. We were put in an airport hotel for 4hrs then an early flight to Christchurch. My husband needed a wheelchair at the airport it was a nightmare. Even though I will still recommend the Cooks I'm sad that I won't make the trip again until there is a direct flight from Christchurch for people from the South Island.*
- + *Was way too expensive for such little to do with children. It felt more of an Adult accommodating country.*
- + *Very expensive for little value experiences. Was also very dated.*
- + *Very boring and overpriced place and polluted water in the lagoon.*
- + *Too far from France and too expensive trip but we really enjoyed our stay.*
- + *Too expensive for what you get in accommodation/ meals etc. No need to return. Other places to visit.*
- + *This was a wonderful but once in a lifetime experience due to our age and the distance from UK.*
- + *Not happy travelling Jetstar took 22 hours from when we left home to arrive at resort 7am and then be told we couldn't go to our room until 2pm afternoon.*
- + *Many other destinations available. Personally prefer the Asian Beachside locations that offer better value for money.*
- + *I had a wonderful holiday. The people were amazing. The island was beautiful but the accident I had there has affected my life. It was an unfortunate accident but could have been prevented if maintenance was carried out. I think for the price of going there it's a once in a lifetime trip.*
- + *Didn't enjoy the food rental was really dangerous. Accommodation dated. Some money needs to be spent in the Cook Islands remodeling.*

Future Motivations

Q: How likely would you recommend the Cook Islands?



Quotes: Reasons to not recommend

- + *The value of going to the Cook Islands is much worse than the value of going to other Pacific islands like those in Fiji and French Polynesia. We stayed in much better hotels in Fiji and French Polynesia for maybe 30 percent of the price of our hotels in the Cook Islands.*
- + *Overpriced. Poor quality. Cold. Windy. Disappointing service.*
- + *Overpriced, complicated return flight (via New Zealand), but nice tropical weather and warm water in the lagoon.*
- + *Did not enjoy the experience, we have travelled to many countries and destinations within Australia and would recommend others, especially if they are not as financially sound as we are, to spend their money travelling Australia or go to Bali for a 3rd of the price.*
- + *Better islands to go to with more things to do and more luxury.*
- + *I mostly enjoyed the swimming and weather, but you can find that in many islands.*
- + *To expensive, Fiji has more entertaining resorts then just a pool.*
- + *Very miserable experience.*

SPO



This report was prepared at SPTO by the Pacific Tourism Data Initiative team in collaboration with the Cook Islands Tourism Corporation and the New Zealand Government.

For any queries regarding this report, please contact PTDI@spto.org

SPTO's Head Office is located at Level 3, FNPF Place, 343-359, Victoria Parade, Private Mailbag, Suva.