

INTRODUCTION

Te Mato Manava Turoto Cook Islands Tourism Corporation is pleased to present the Visitor Economy Factsheet Vol 1. As we prepare for the year ahead 2024, this fact sheet is designed to share key data and insights regarding Tourism, the visitor and economic contribution of the single largest industry for the Cook Islands. The information is correct at the time of print, and continues to be updated. For more detailed information, please find below a QR code providing digital access to a shared library of reports and resources.

ECONOMIC CONTRIBUTION

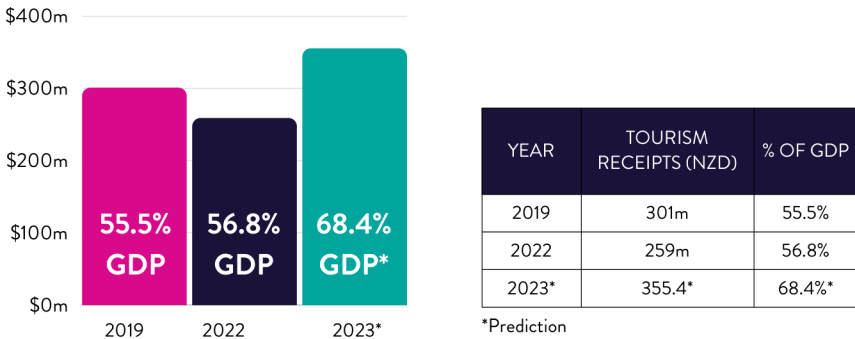
Tourism contributes significantly to the economic prosperity of the Cook Islands. Visitor expenditure flows into the country through receipts (visitors spending while on island) and VAT paid by businesses to CI Government. In 2023, it is estimated that Tourism contributed \$355 million. This is equivalent to 68.4% of GDP. This was an increase of 37% from 2022 (\$259M).



TOURISM RECEIPTS

Tourism receipts represent the contribution of the tourism industry to the local economy. For 2023, the tourism industry accounts for 68.4% of GDP meaning that 68 cents of every dollar added to the Cook Islands economy comes from tourism.

2019 vs 2022 vs 2023 CALENDAR YEAR



ECONOMIC IMPACT (60%GDP)

International Visitors Survey, July 2022 - June 2023

Prepaid expenditure amongst visitors rose to \$2,476 per person per trip, while average length of stay also grew from 8.5 nights to 8.9 nights.

PREPAID EXPENDITURE

\$2,476
PREPAID PER TRIP
vs \$2,049 JUL 2019 - MAR 2020

40%
FLOWING INTO LOCAL ECONOMY RATE
vs 40% JUL 2019 - MAR 2020

\$989
PREPAID PER TRIP
vs \$820 JUL 2019 - MAR 2020

IN-COUNTRY SPEND

\$200
IN-COUNTRY SPEND PER DAY
vs \$154 JUL 2019 - MAR 2020

x8.9 NIGHTS
AVERAGE LENGTH OF STAY
vs 8.5 NIGHTS JUL 2019 - MAR 2020

\$1,814
IN-COUNTRY SPEND PER TRIP
vs \$1,316 JUL 2019 - MAR 2020



ECONOMIC IMPACT

\$2803 PER TRIP vs \$2,136 JUL 2019 - MAR 2020
\$315 PER DAY vs \$250 JUL 2019 - MAR 2020

VISITOR ARRIVALS

The Cook Islands welcomed 143,506 visitors in 2023. Average visitor nights increased in the 2022 - 2023 financial year to 8.9 nights from 8.5 nights in 2019 - 2020, with 98% willing to recommend the destination to others. On average, each visitor typically spends approximately \$200 on island per day. July remains our busiest month, with over 16,000 visitors arriving on island while our quietest month was recorded in February, with just a little over 6,000 visitors reaching our shores.



VISITOR INSIGHTS

Leisure travel remains the top purpose for visiting, followed by weddings and visiting family and friends are the next highest reasons to travel amongst visitors. Visitors aged 70 and over made up 13% of our visitor arrivals. This is almost double what it was in 2019. 46% of travellers are visiting for the first time. The average income of visitors has seen a rise from \$131,000pa in 2019 to \$150,000pa.



HOLIDAY
84%

vs 80% JUL 2019 - MAR 2020



BUSINESS
3%

vs 2% JUL 2019 - MAR 2020



WEDDING
5%

vs 7% JUL 2019 - MAR 2020



VFR
4%

vs 4% JUL 2019 - MAR 2020



HONEYMOON
2%

vs 2% JUL 2019 - MAR 2020



AGED 70+
13%

vs 7% JUL 2019 - MAR 2020



TRAVEL COMPANIONS
4 PEOPLE

vs 4 JUL 2019 - MAR 2020



FIRST VISIT
46%

vs 58% JUL 2019 - MAR 2020

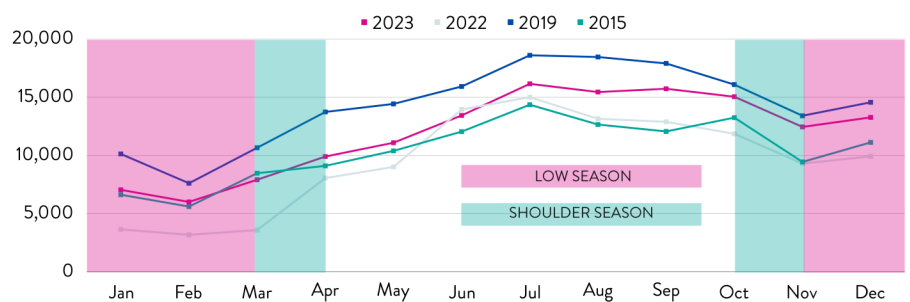


AVG. INCOME
\$150,973

vs \$136,536 JUL 2019 - MAR 2020

ANNUAL VISITOR ARRIVALS BY CALENDAR YEAR

When looking at annual visitor arrivals, it is important to understand the varying seasons and the associated visitor numbers. The graph below shows us that the low and shoulder months provide an opportunity for improvement and growth.



Calendar Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
2023	7,041	6,003	7,910	9,904	11,091	13,440	16,159	15,452	15,734	15,049	12,453	13,270	143,506
2022	3,638	3,173	3,583	8,053	9,011	13,953	15,012	13,151	12,893	11,860	9,308	9,916	113,551
2021	63	62	139	166	1,486	6,054	12,405	5,856	0	0	46	53	26,330
2020	9,986	8,928	5,814	0	0	98	160	17	44	26	85	122	25,280
2019	10,128	7,608	10,659	13,739	14,430	15,928	18,612	18,464	17,913	16,092	13,410	14,567	171,550
2018	9,527	8,459	11,963	13,231	15,171	16,083	18,332	16,777	16,499	15,468	13,141	14,109	168,760
2017	9,976	7,731	10,954	13,246	13,423	15,666	16,408	15,873	15,696	15,404	12,684	14,301	161,362
2016	8,226	6,109	9,926	11,346	12,262	14,370	16,469	14,442	14,859	14,245	11,129	13,090	146,473
2015	6,621	5,604	8,469	9,102	10,391	12,048	14,362	12,658	12,063	13,252	9,440	11,120	125,130

COMPARISON

FRENCH POLYNESIA (17%GDP)*
\$5,300 PER VISITOR PER TRIP

*SOURCE: tahititourisme.org & ispf.pf

FIJI (40% GDP)**

\$3,572 PER VISITOR PER TRIP

**SOURCE: Fiji MPO worldbank.org

INDUSTRY CAPACITY

Capacity refers to the maximum number of passengers or guests that can be accommodated at any given time. This section includes a breakdown of travel and accommodation capacity as well as airline inventory.

TRAVEL CAPACITY

Travel capacity is currently at 78%, meaning that 78% of seats on incoming flights are filled by visitors.



AIRLINE INVENTORY

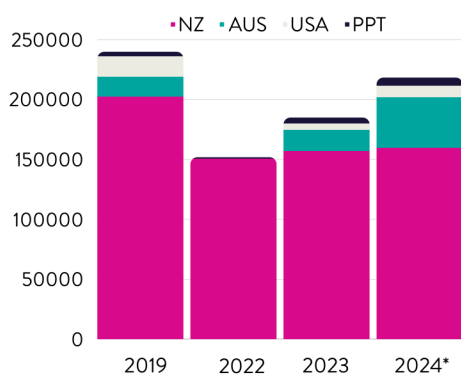
Detailed below is seat capacity from source markets per calendar year from 2019 to 2023 and predictions for 2024. This year the Cook Islands is set to see a 18% total increase in seat capacity. Also featured is the airlift by airline (Jetstar = Combined airlift from Sydney and Auckland).

2024* SEAT CAPACITY BY CARRIER



SEAT CAPACITY BY COUNTRY

2019 vs 2022 vs 2023 vs 2024 CALENDAR YEAR

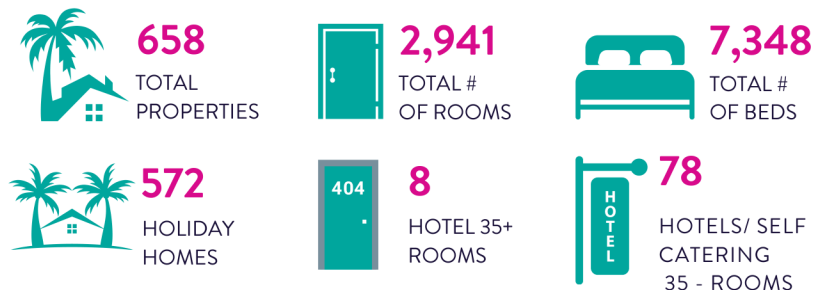


ORIGIN	2019	2022	2023	2024*
New Zealand	202,479	150,901	157,267	160,000
Australia	16,972	0	17,496	42,000
USA (HNL)	16,777	0	5,312	9,776
Tahiti	3,593	884	4,832	6,500
TOTAL	239,821	151,785	184,907	218,276

*PREDICTED

ACCOMMODATION CAPACITY

Accommodation capacity is the number of properties, holiday homes and rooms available on destination during the 2022/2023 Financial year period.



CRUISELINE CAPACITY

In the 2022-2023 Financial year, there were 34 cruise ships scheduled to arrive, with 29 staying and operating and 5 cancelled due to weather. There were 4,290 shore arrivals to Rarotonga and 3,059 to Aitutaki



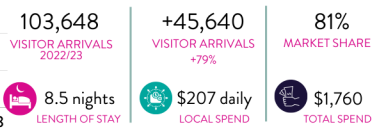
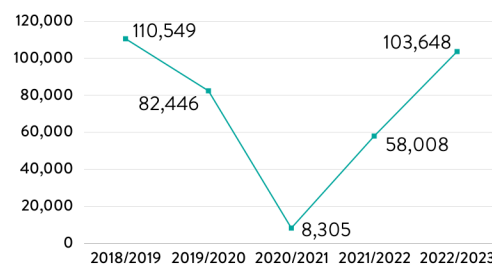
SOURCE MARKET PERFORMANCE

This section breaks down visitor arrival factors such as visitor arrival numbers, market share, length of stay and daily and total spends. These stats are important in understanding the characteristics of visitors from source markets.

NEW ZEALAND

DIRECT ACCESS SINCE 13 JANUARY 2022

VISITOR ARRIVALS 2018/19 - 2022/23

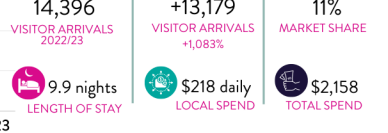
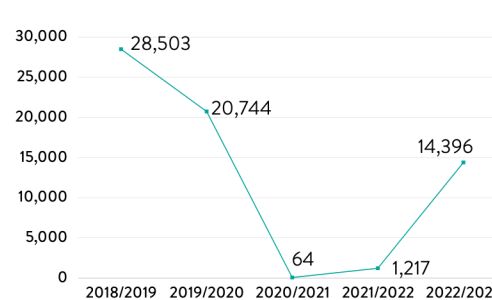


New Zealand has contributed over 100 thousand visitors to our annual visitor arrival numbers, giving them a 81% market share with visitors typically staying for 8.5 nights and spending on average \$1,760 per visit.

AUSTRALIA

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VISITOR ARRIVALS 2018/19 - 2022/23

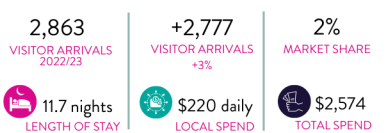
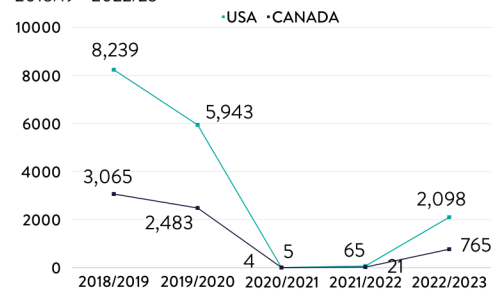


Australia currently contributes to 11% of arrivals, with 14,396 visitors in the last year. Australian visitors tend to stay longer and spend more, with visitors staying on average for 9.9 nights and spending of \$2,158.

NORTH AMERICA

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VISITOR ARRIVALS 2018/19 - 2022/23

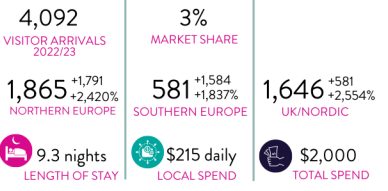
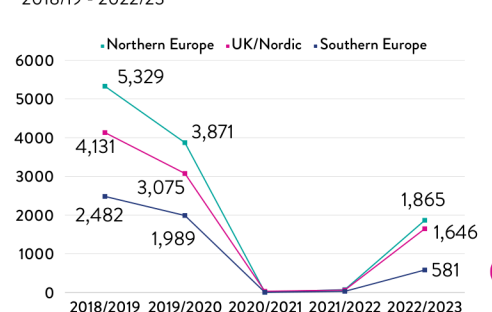


North American visitor arrivals saw a 3% increase and currently holds a 2% market share. With the average visitor staying for 11 nights and spending a total of \$2,574.

NORTHERN EUROPE / SOUTHERN EUROPE / UK / NORDIC

NO DIRECT ACCESS. OPTIONS VIA PPT/ HNL/ AKL/ SYD

VISITOR ARRIVALS 2018/19 - 2022/23



Visitor arrivals across Northern Europe, Southern Europe, UK and nordic markets has seen positive growth since 2021/2022. With a 3% market share and visitors staying on destination for an average of 9 nights and spending \$2000 per visit.

Scan the QR code to view and download the digital Visitor Economy Factsheet

Feedback or questions? Please contact headoffice@cookislands.travel

