

Looking forward to 2023: Visitor Insights from the Pacific Tourism Data Initiative



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Pacific Tourism 2010-20

- The decade prior to 2020 was a period of tourism growth – for some sustained, for others uneven
- Tourism became increasingly vital to many PIC economies (income, jobs, inter-sectoral linkages)
- Overtourism ‘hotspots’ emerged
- Growing impacts on ecosystems/environment
- Concerns over community acceptance and well-being
- Constant challenges: GCC, labour, poverty alleviation, spreading tourism benefits to all...





Which path to follow now?

- Re-imagine, reset, pivot: a greater focus on sustainable and regenerative tourism?
- A return to overtourism & unsustainable practices?
- Or somewhere in between...?

A critical need for sustained and robust indicators of industry performance that reflect local needs...

The Pacific Tourism Data Initiative

PTDI Phase 1 countries:

- Solomon Islands
- Vanuatu
- Samoa
- Niue
- Cook Is
- Yap (FSM)
- PNG

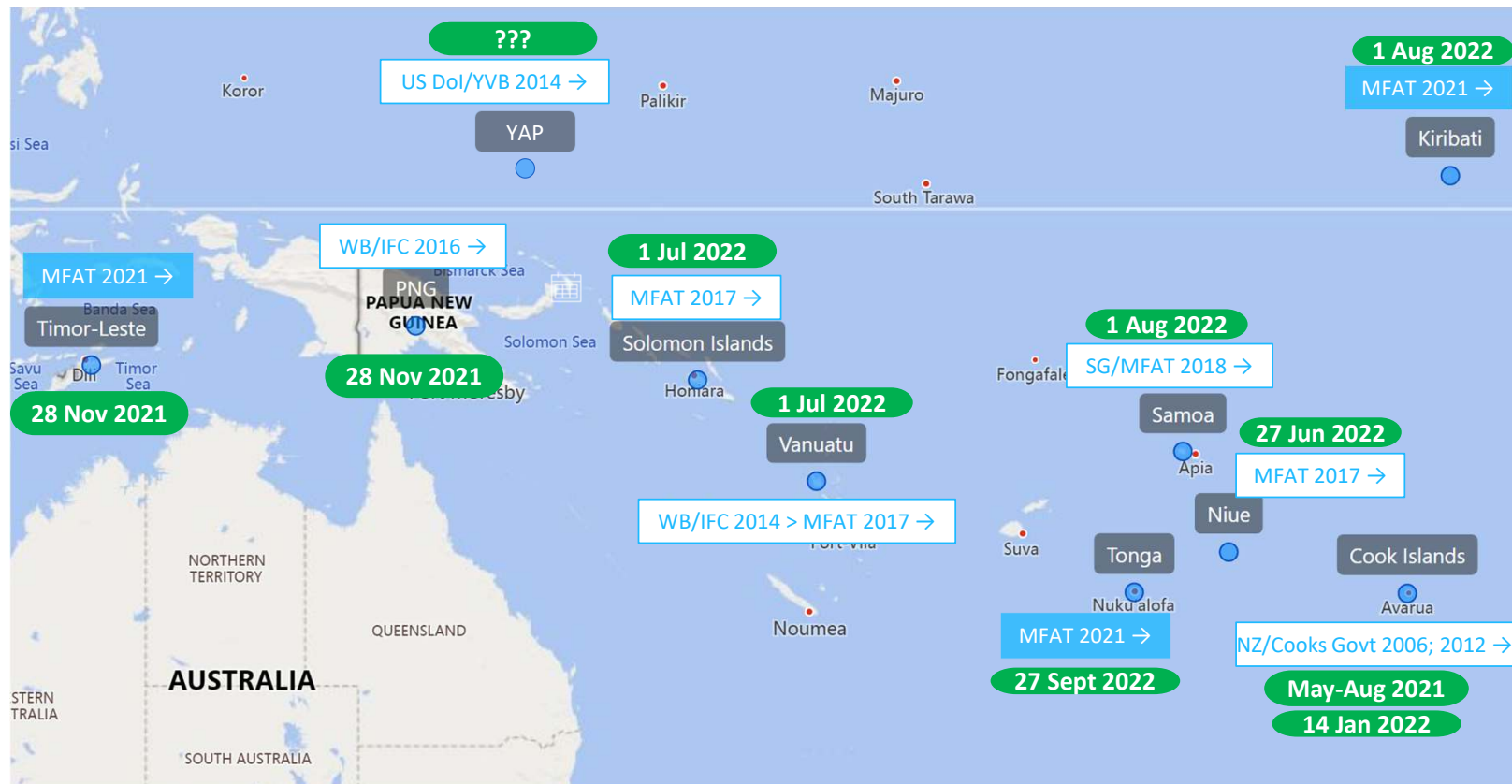
Goal: to increase evidence-based tourism decision making in the Pacific that strengthens sustainable economic development.

PTDI Phase 2 countries:

- Kiribati
- Timor-Leste
- Tonga

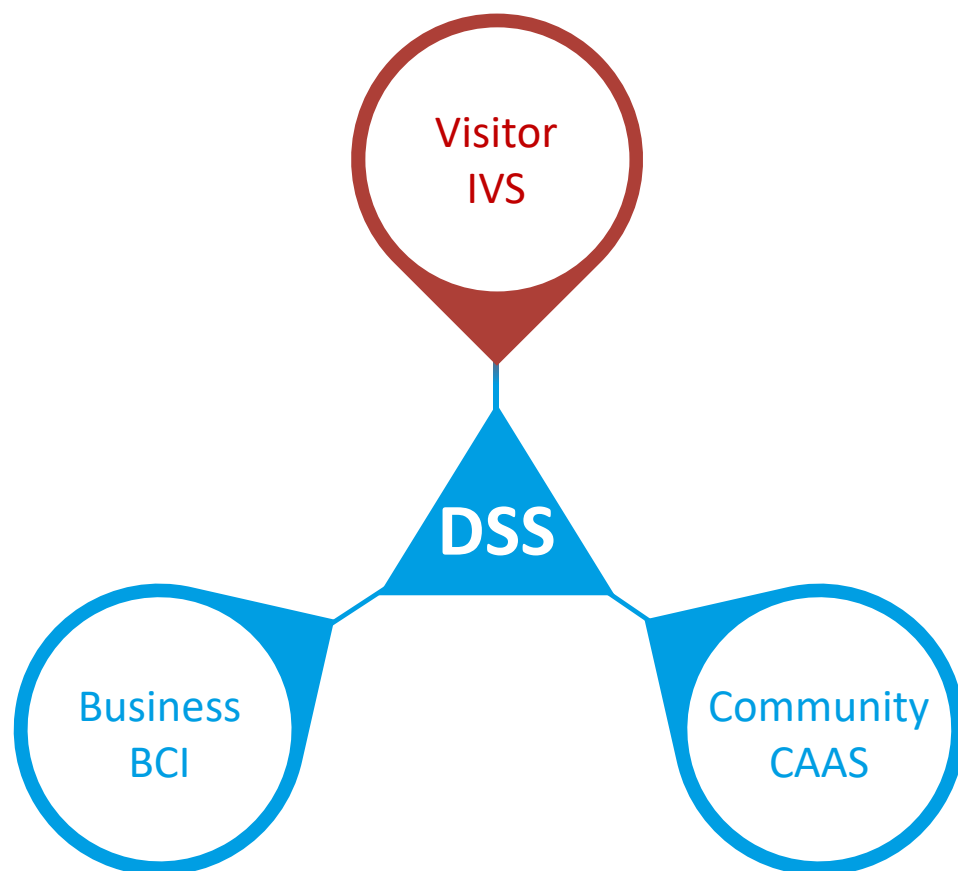
Border Opening Date

PTDI Start date→



www.nztri.org.nz

Three research pillars of the Pacific Tourism Data Initiative



Tourism Decision Support System (DSS)

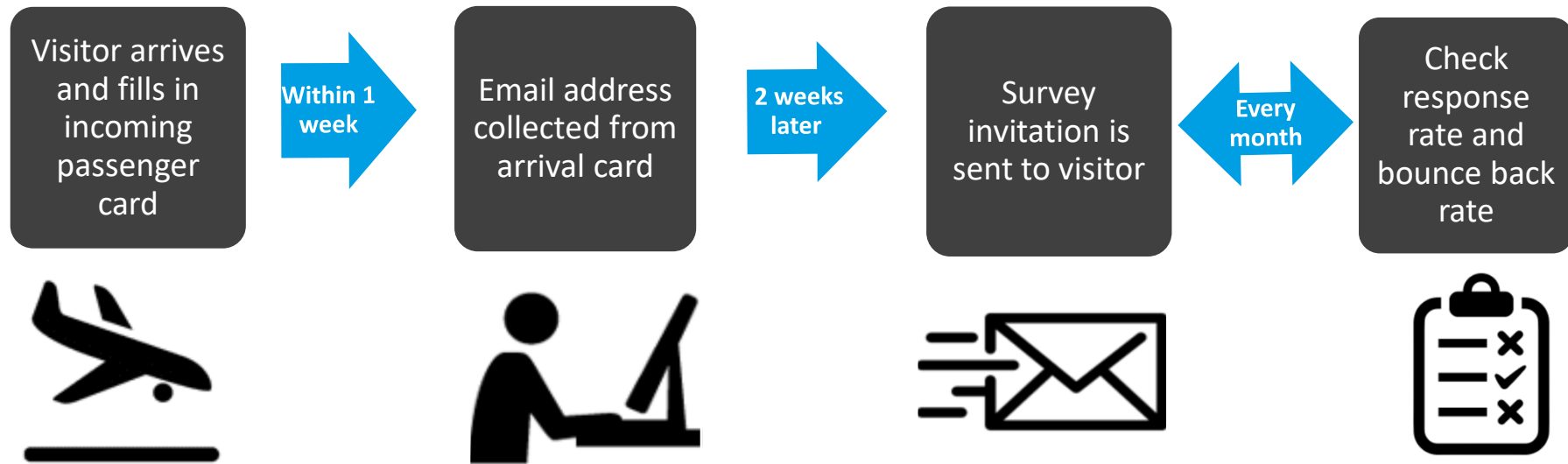
Supports and learns from other key research activity: ecosystem, environmental, well-being etc



Key Partners

Immigration, NTO, Statistics, Chamber of Commerce, Community Groups.

PTDI IVS Process



- Low cost to sustain
- Scalability – local to national
- Flexible to meet changing needs (e.g. incorporate events, outer island dimensions)
- Regional comparability between PICs
- Strong Response Rates (15 - 45%)
- Timeliness of dissemination
- Technology/knowledge transfer

Ratio of Locals: International Air Visitors 2019

Local 1 : Visitors 10



Cook Islands



1 : 7



Hawaii*

1 : 6



Niue

1 : 1



Fiji *

1 : 1



Samoa

1 : 1



French Polynesia*

1 : 0.4



Vanuatu

* Not part of PTDI program

The changing visitor ?



Comparison of IVS data post border opening

	Cook Islands *			Samoa **			Vanuatu ***	
	<u>July – Aug 2021</u>	<u>% change</u>		<u>Aug - W1&2 Sep 2022</u>	<u>% change</u>		<u>July 2022</u>	<u>% change</u>
Market concentration	▲	NZ 57%		▲	NZ 8%		▲	AUS 13%
Length of stay	▲	10%		▲	24%		▲	19%
Travel companions	▼	-38%		▼	-33%		▼	-35%
Age - 50+	▲	3%		●	0%		▲	12%
Age - 70+	▲	44%		▲	17%		▲	108%

* Compared with Cook Islands IVS 2019/20 annual NZ market result except the main market comparison;

** Samoa IVS 2019 annual result;

*** Vanuatu IVS July to September 2019 result respectively.

Comparison of IVS data post border opening with 2019 data

	Cook Islands *			Samoa **			Vanuatu ***	
	<u>July – Aug 2021</u>	<u>% change</u>		<u>Aug - W1&2 Sep 2022</u>	<u>% change</u>		<u>July 2022</u>	<u>% change</u>
Purpose of visit - VFR	▲	80%		▲	133%		▲	153%
Purpose of visit - Holiday	▲	1%		▼	-52%		▼	-11%
Purpose of visit - Business	▲	229%		▼	-28%		▲	46%
Purpose of visit - Wedding	▼	-95%		▼	-82%		▼	-60%
First time visitor	▼	-24%		▼	-54%		▼	-9%

* Compared with Cook Islands IVS 2019/20 annual NZ market result except the main market comparison;

* *Samoa IVS 2019 annual result;

*** Vanuatu IVS July to September 2019 result respectively.

Comparison of IVS data post border opening

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	<u>July – Aug 2021</u>	<u>% change</u>		<u>Aug - W1&2 Sep 2022</u>	<u>% change</u>		<u>July 2022</u>	<u>% change</u>
Household income	▲	38%		▲	18%		▲	11%
Prepaid spend per visit	▲	29%		▲	16%		▲	25%
In-country spend (/person/day)	▲	37%		▲	25%		▲	24%
Overall satisfaction	▲	2%		●	0%		●	0%
Recommend	●	0%		▼	-2%		▼	-2%

* Compared with Cook Islands IVS 2019/20 annual NZ market result;

** Samoa IVS 2019 annual result;

*** Vanuatu IVS July to September 2019 result respectively.

2019 Apr-Jun NZ VISITORS



54%

Visitors travel with more than one companion.



47%

Visitors visited for the first time.



7.6 nights

Length of stay



4.5/5

Overall, visitors are very satisfied.



2022 Apr-Jun NZ VISITORS



57% ▲

Visitors travel with more than one companion.



41% ▼

Visitors visited for the first time.



8.7 nights ▲

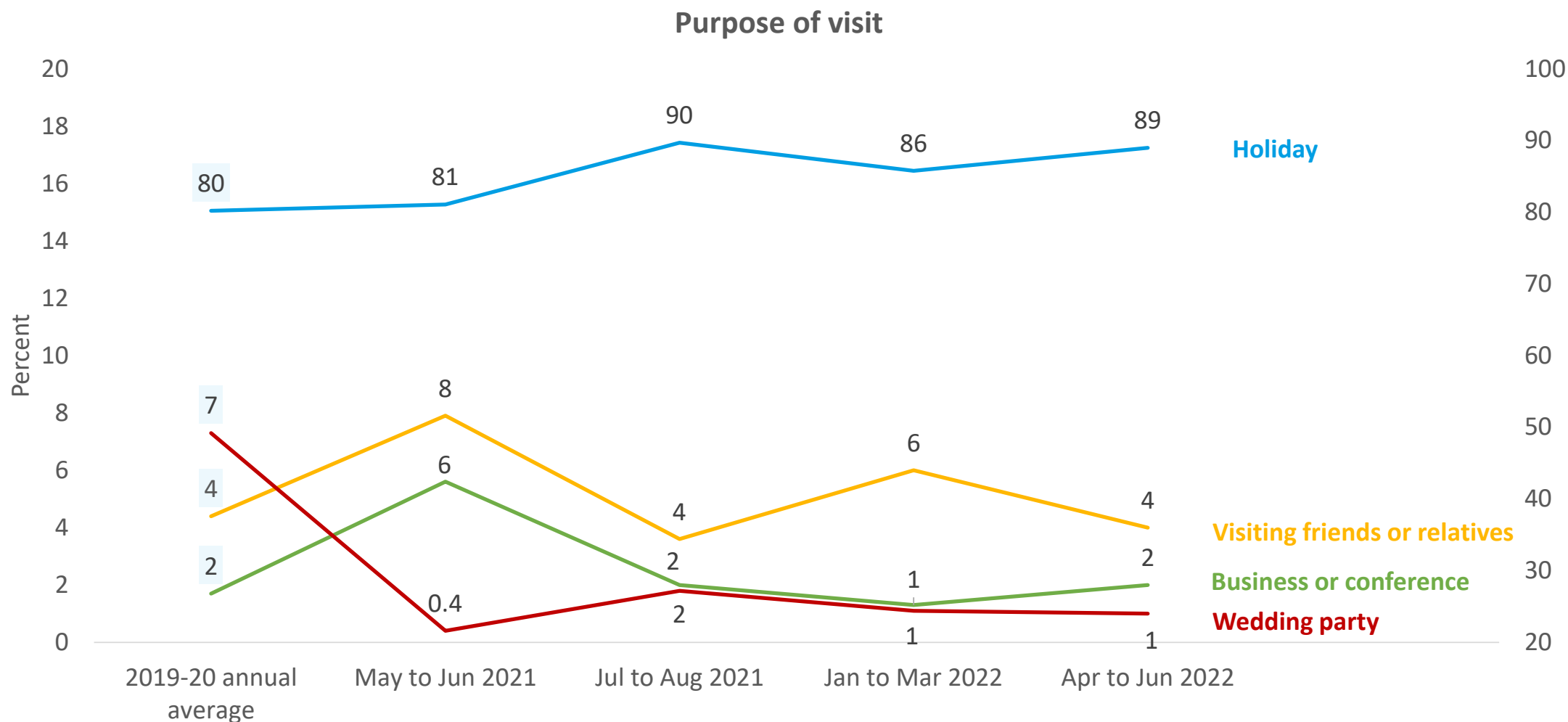
Length of stay



4.6/5 ▲

Overall, visitors are very satisfied.

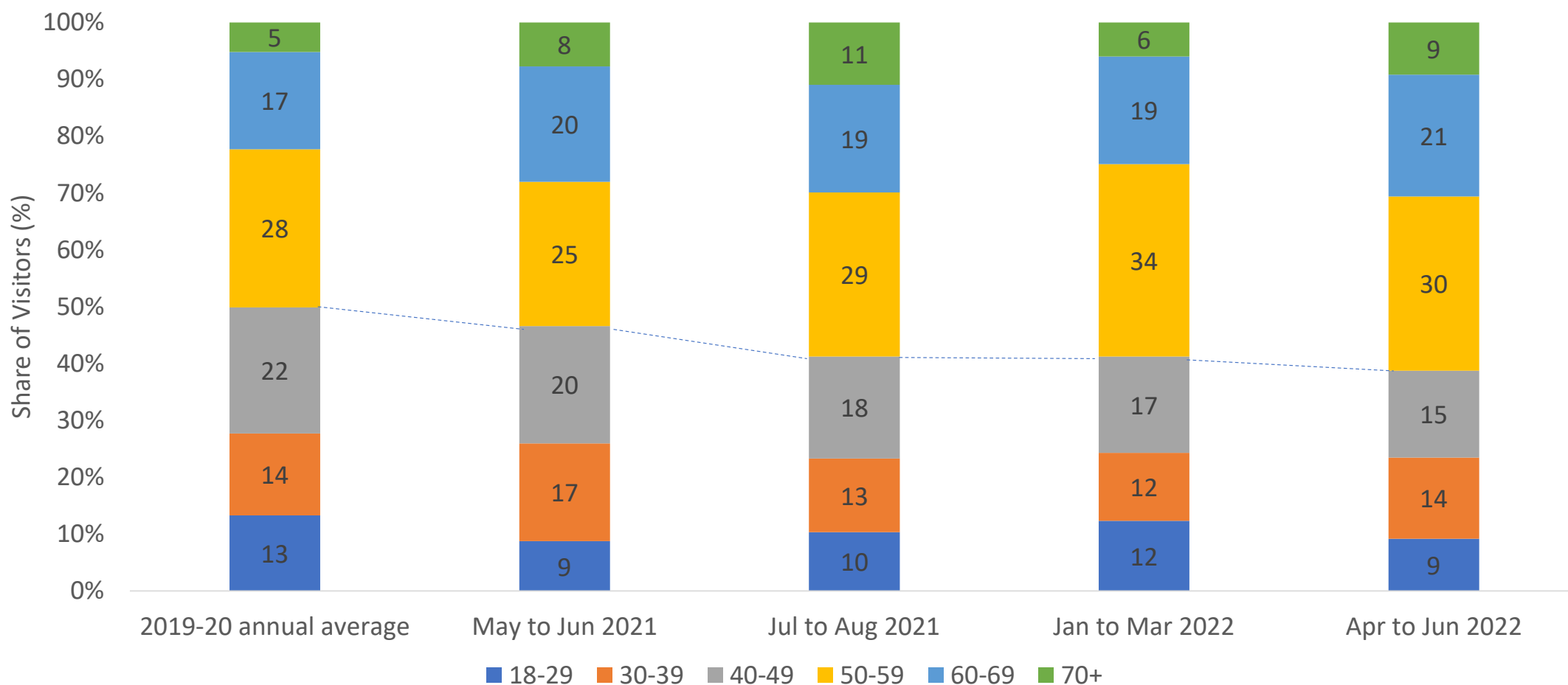
COOK ISLANDS IVS



COOK ISLANDS IVS

NZ VISITORS

Age group



2019 Apr-Jun NZ VISITORS



2022 Apr-Jun NZ VISITORS



\$123,338

Average household income



\$1,700

Prepaid spend per visit



\$153

Local spend per person per day



\$152,566 ▲

Average household income



\$2,082 ▲

Prepaid spend per visit



\$199 ▲

Local spend per person per day

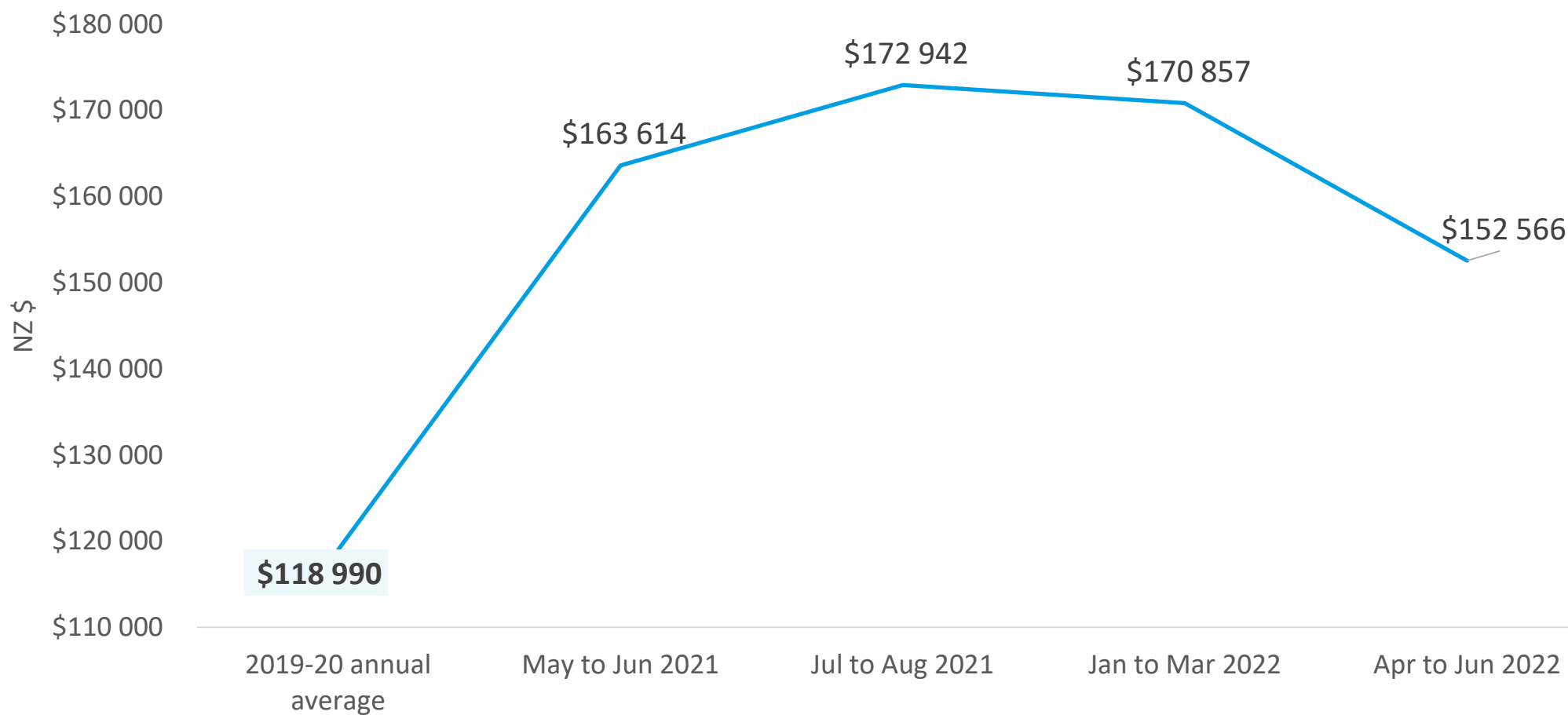
COOK ISLANDS IVS

Note: NZ dollars.

COOK ISLANDS IVS

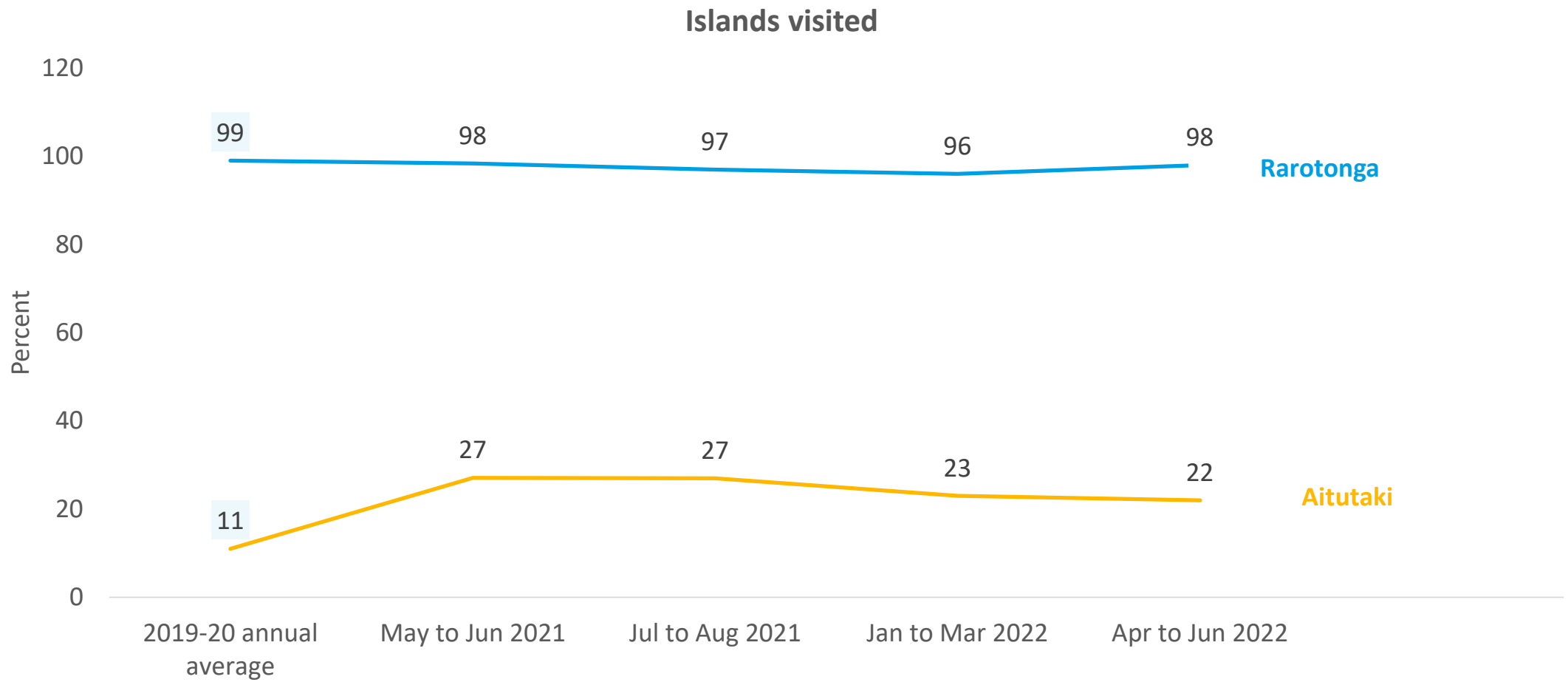
NZ VISITORS

Average Household Income

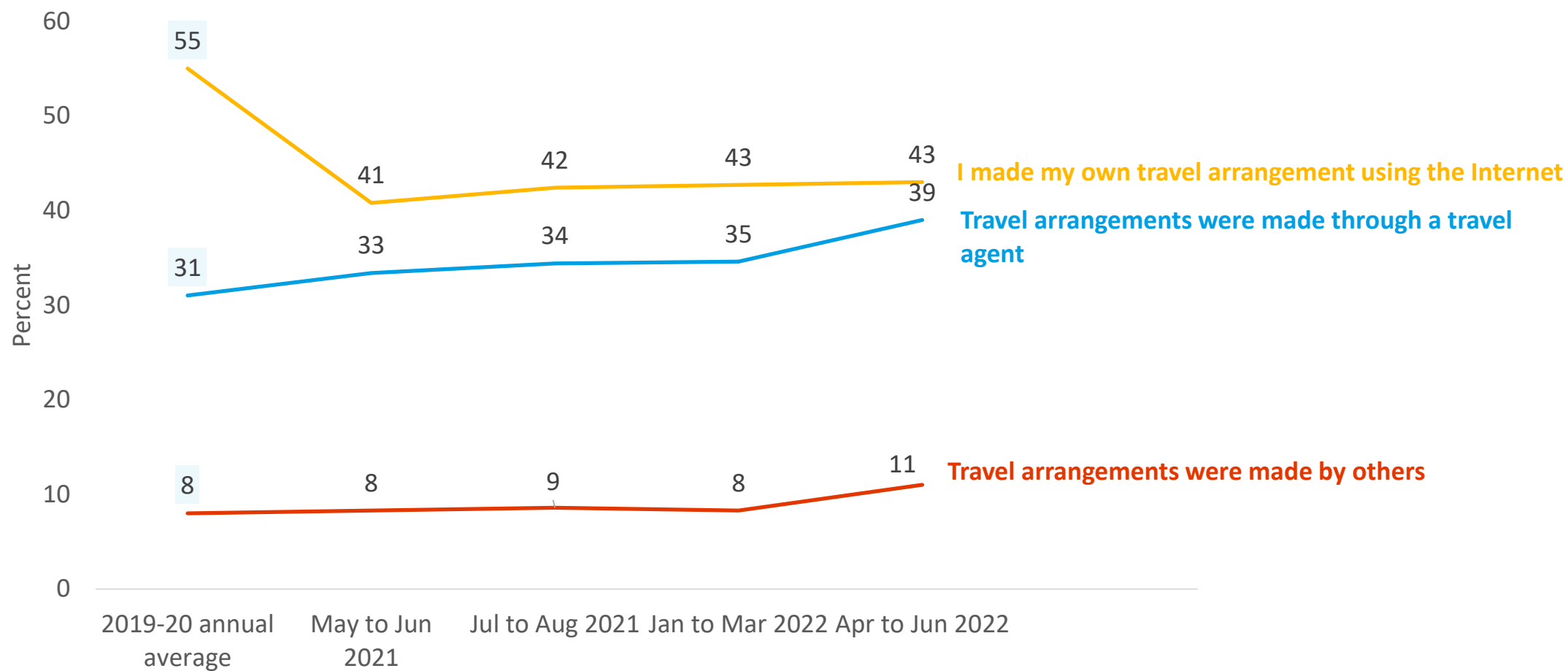


COOK ISLANDS IVS

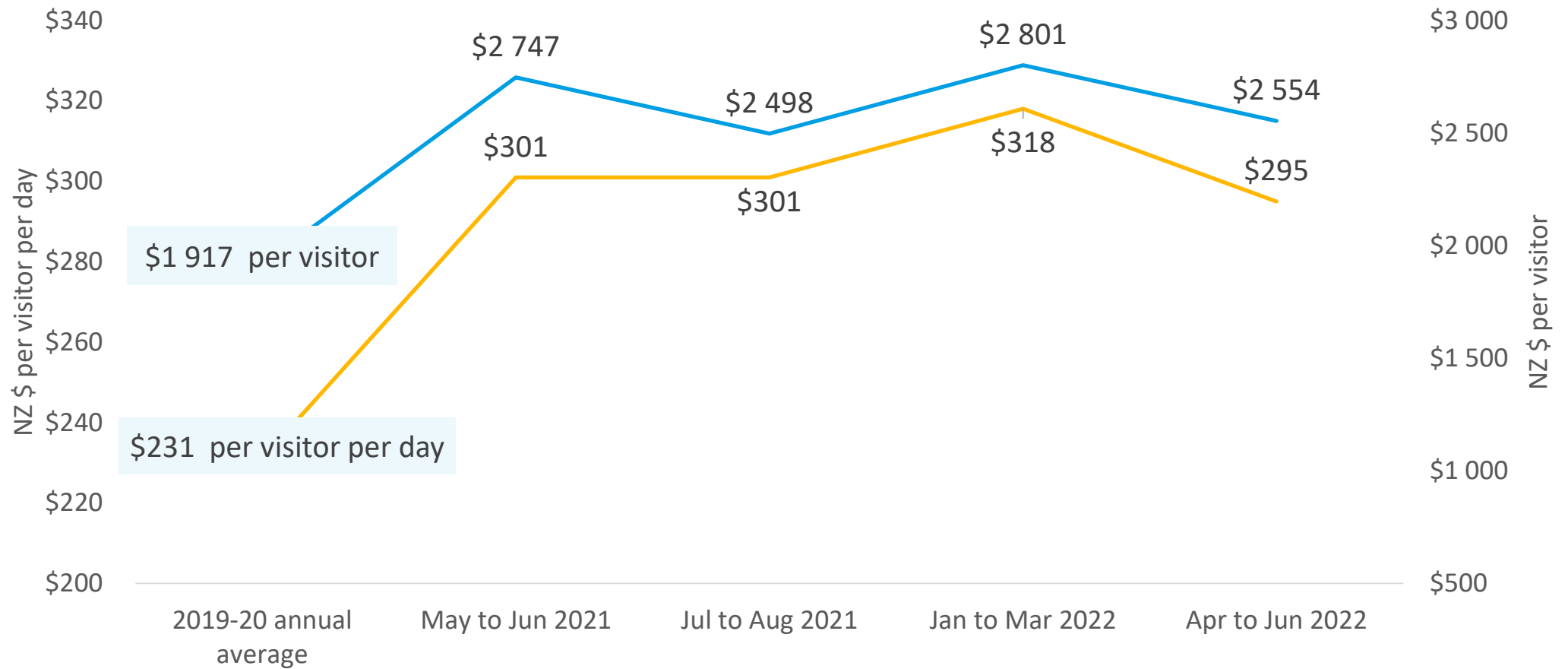
NZ VISITORS



How did you purchase your travel?



Pre-paid (40%) and in-country spend





Who will the leisure traveller be in 2023?

- Couples, a slightly older visitor profile: implications for accessible tourism, health and safety and product development.
- Higher income and higher spend: focus on quality, service and value for money.
- Repeat 'devoted' visitors important, looking for deeper experiences. Build cultural and community dimensions.
- Length of stay grows and outer island travel sees relative increases ("making the most of it").
- Niche, boutique accommodation do well, mid-range resorts struggle for a while.
- Family travel, group travel bounces back but recessionary pressures impact discretionary spend. Weddings slow to return.
- Role of VFR increases then settles back to pre-pandemic flows.
- A shift in bookings toward agents due to ongoing uncertainty.

What about business travel?

- Business travel - an initial burst then levels drop lower than pre-pandemic
- Are F2F meetings always needed? cost and carbon
- Major implications for: 'business dependent' PIC tourism sectors and major urban areas



All PTDI Resources available here:

Tourism Research - Pacific

Select a country below to learn more about the resources that have been developed.

Cook Islands



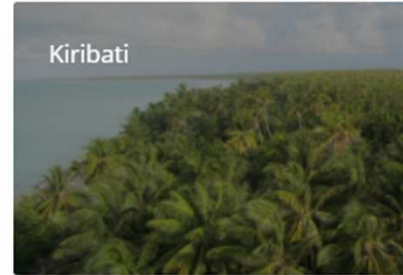
Vanuatu



Samoa



Kiribati



Yap, FSM



Niue



Solomon Islands



Papua New Guinea



Tonga



Timor Leste



www.nztri.org.nz/visitor-research/pacific

RESEARCH

www.cookislands.travel/corporate/research-report

COOK ISLANDS RESOURCES AND OUTPUTS

NZTRI facilitates an online Visitor Survey for the Cook Islands Tourism Corporation (CITC), (2012 - present). A summary of the results from each year is available below. This research was designed to provide a deeper understanding of the characteristics of visitors to the Cook Islands including their expectations and expenditure. Feedback from visitors to the Cook Islands enables Cook islands Tourism to improve the visitor and host experience of tourism as well as support it to make good decisions about future tourism development. This research evolved from previous work undertaken by NZTRI in the Cook Islands from 2005 to 2007.

In 2016 NZTRI also commenced a business confidence index survey to provide a supply side perspective on the industry. These reports are completed twice a year and reflect low and high season periods. The information provided give insights into the challenges and opportunities facing tourism businesses and enables useful feedback on government policy initiatives.

In 2018 NZTRI completed the first ever national community-focused tourism awareness survey and this was again repeated in 2019. This work provides insights into how the residents of the Cook Islands feel about tourism and the various costs and benefits associated with the industry.

Together these three bodies of research allow us to develop a decision support system that can help guide tourism strategy an policy development and support the design and use of effective indicators of tourism's contribution to sustainable development.

INTERNATIONAL VISITOR SURVEY

Cook Islands Visitor Survey - Report - Apr 2022 to Jun 2022

Cook Islands Visitor Survey - Report - Jan 2022 to Mar 2022



Ngā mihi

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