

Cook Islands Visitor Survey Results

January - March 2013

Prepared for Cook Islands Tourism Corporation

by

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Executive Summary

This report focuses on the characteristics, expectations and expenditure patterns of tourists who visit the Cook Islands. The data presented is drawn from an online departure survey. The survey period covered in this report is 1 January to 31 March 2013. There were 1391 individual respondents to the survey - representing a total of 2715 adults and an additional 332 children (this equates to 7% of all visitors during the period – based on the latest 2009 visitor arrival data from the Cook Islands Statistics Office).

The survey results for this quarter are very similar to the survey results of the previous three quarters. The consistency in the responses over three quarters is an indication of the robustness of the dataset. There is, however, some variation in spend figures in the Cook Islands in the fourth quarter compared to the previous quarters.

The majority (55%) of visitors surveyed come from New Zealand, 25% come from Australia. Visitors are generally well educated (69% of visitors have some form of tertiary education) and have a higher than average annual household income (42% earn over NZ\$100,000 per year). Nearly half (48%) of the visitors travel with just one companion. Solo travellers are relatively rare (6%).

Nearly two-thirds of the visitors surveyed (64%) are on their first visit to the Cook Islands, a further 21% have visited once or twice before. The main purpose of visit is holiday making (68%). The average length of stay in the Cook Islands is 9.9 nights. The majority of the visitors (82%) stay either one or two weeks. Most (81%) of the visitors surveyed visit Rarotonga, 17% visit Aitutaki, only 2% visit another island.

On average, visitors to the Cook Islands spend NZ\$2,072 per person prior to arrival (up from NZ\$1,990 during the previous quarter). Of this, 40% (\$829) is estimated to flow to the Cook Islands.

While in the Cook Islands, the total local spend per visitor per day is \$100 (down from \$109 during the previous quarter), and the average local spend per visitor during the whole trip is \$990. If the prepaid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,819 to the Cook Islands economy (or \$184 per day). The decline in 'in-country' spend may reflect seasonal pricing shifts and also changes in visitor behaviour.

Visitor satisfaction with activities and services is generally high. Land-based activities are characterised by the strongest participation levels; cultural activities are characterised by the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are considered to be the friendly people, the unspoilt environment and the peacefulness of the destination. The least appealing elements of the Cook Islands experience are considered to be the poor quality and value for money of tourism services such as accommodation and rental cars, quality and frequency of public transport, the inconvenient flight times, the presence of rubbish on beaches and the numerous stray dogs.

Overall satisfaction on the part of tourists is very high: 4 out of every 5 of the visitors (93%) surveyed want to return to the Cook Islands and 98% would recommend the Cook Islands to friends or family.

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Introduction

The Cook Islands government and local businesses require a clearer picture of the characteristics, expectations and expenditure patterns of tourists who visit the nation. This information is needed to enable the effective planning and development of the tourism industry and to highlight its crucial role within the broader Cook Island's economy. Visitors to the Cook Islands are asked to complete a web-based survey within two weeks of the completion of their visit. This web-based survey ran for 12 months on a quarterly basis.

This report presents the results from the January to March 2013 period. Over this three month period, 5226 visitors were contacted by email to take part in the survey, and 1391 responses were received: a conversion rate of 27%. These responses cover a total of 2715 adults and 332 children. The conversion rate (20% for 3rd quarter) and number of responses (494 responses for 3rd quarter) for this quarter are higher than the previous quarter.

The data presented detailed information on:

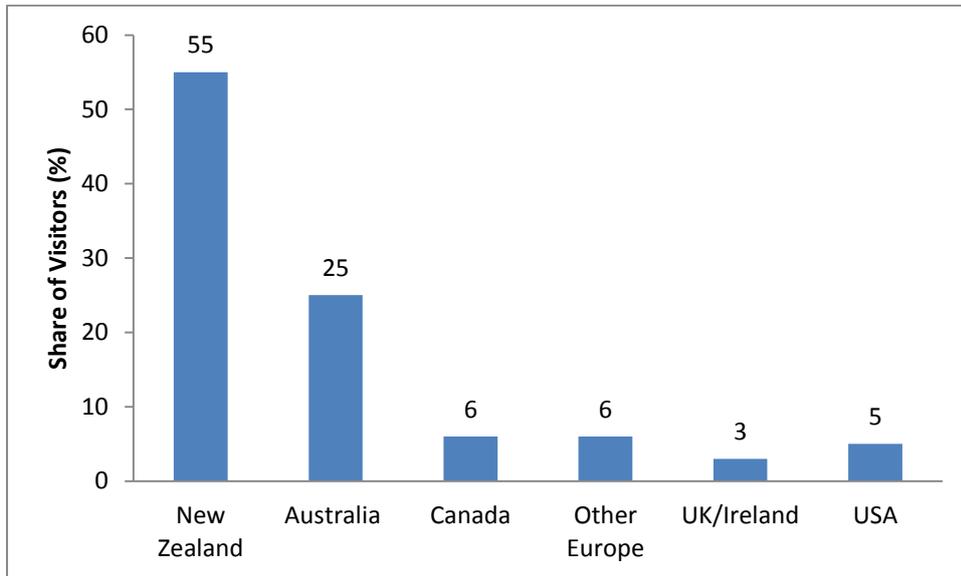
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook Islands, items of spending).
- Visitor satisfaction (most and least appealing elements of the visit, overall satisfaction, satisfaction with activities).

Where there are significant and notable variations from the findings of previous quarters some comparison is made, otherwise only data for January – March 2013 is discussed. Comparisons across the four quarters will be provided in the annual report for this series.

Visitor Characteristics

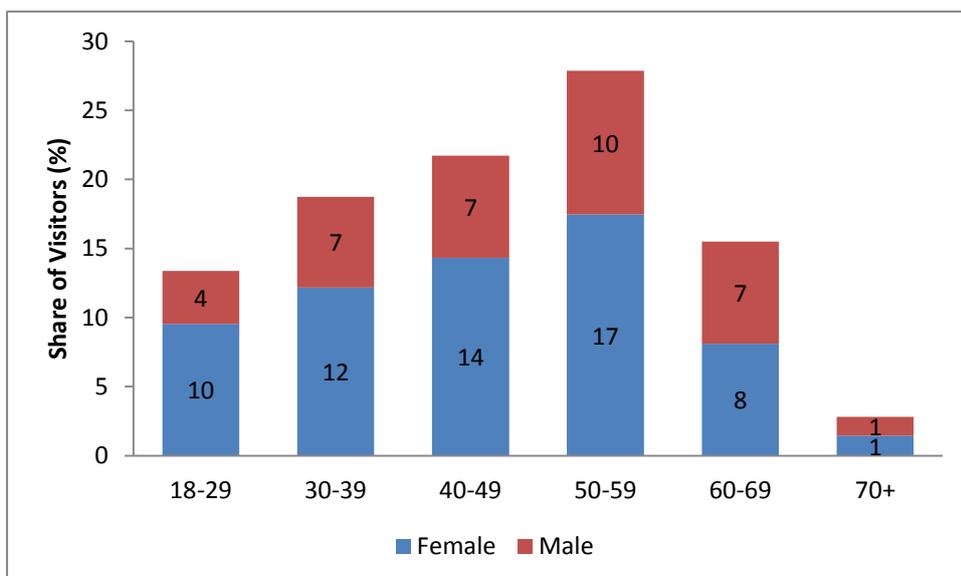
The majority of the visitors surveyed (55%) come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 25% of respondents. Canada, Europe, Great Britain and the USA are the other key source markets.

Figure 1: Country of Origin (n=1206)



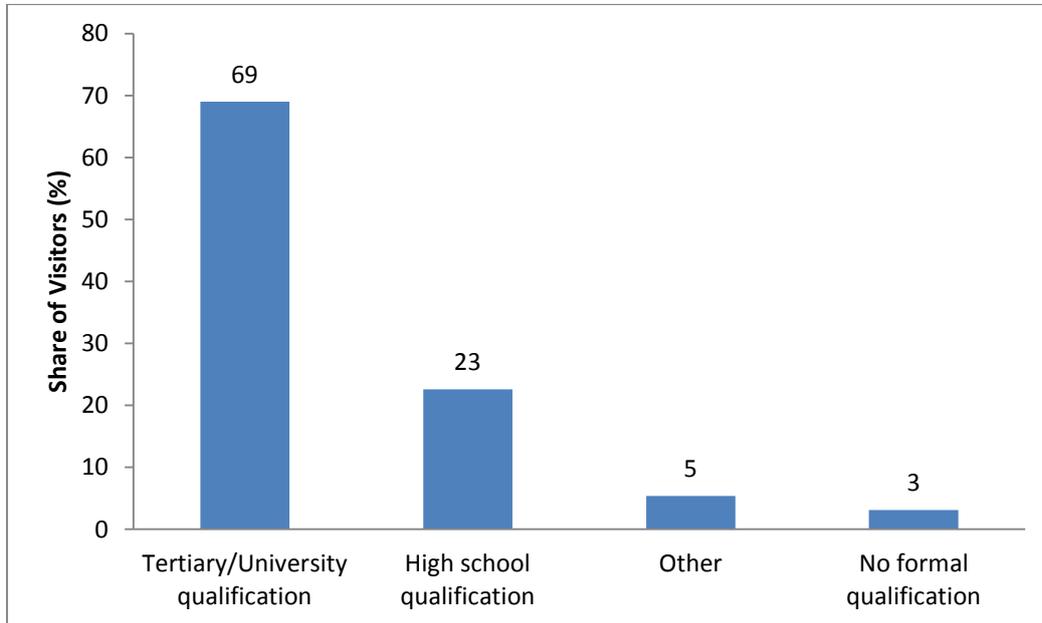
More women (62%) than men (36%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented, followed by the 40 to 49 and 30 to 39 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=1174)



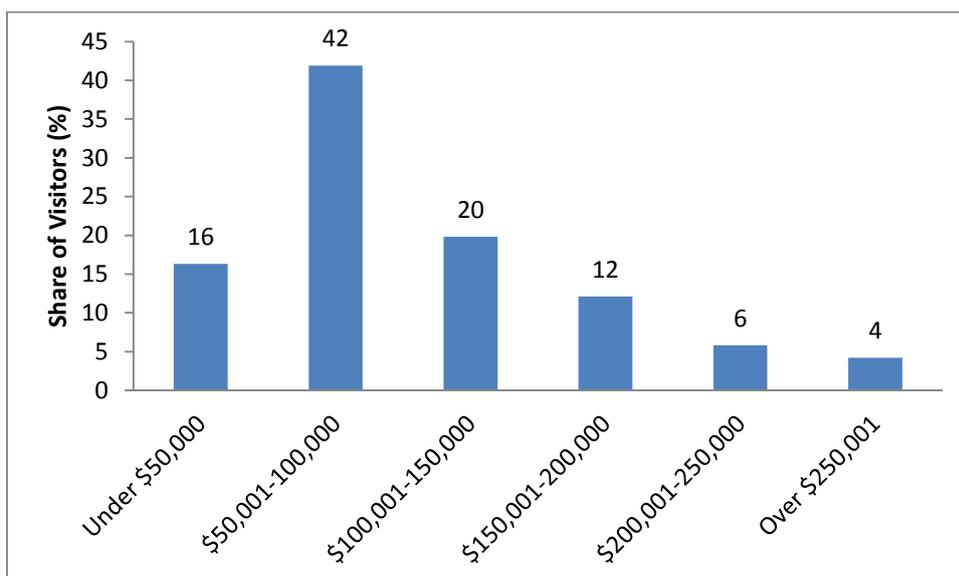
Visitors are well educated. More than two-thirds (69%) of the visitors surveyed had some form of tertiary qualification (Figure 3), and a further 23% finished their education after completing high school.

Figure 3: Highest Qualification (n=1179)



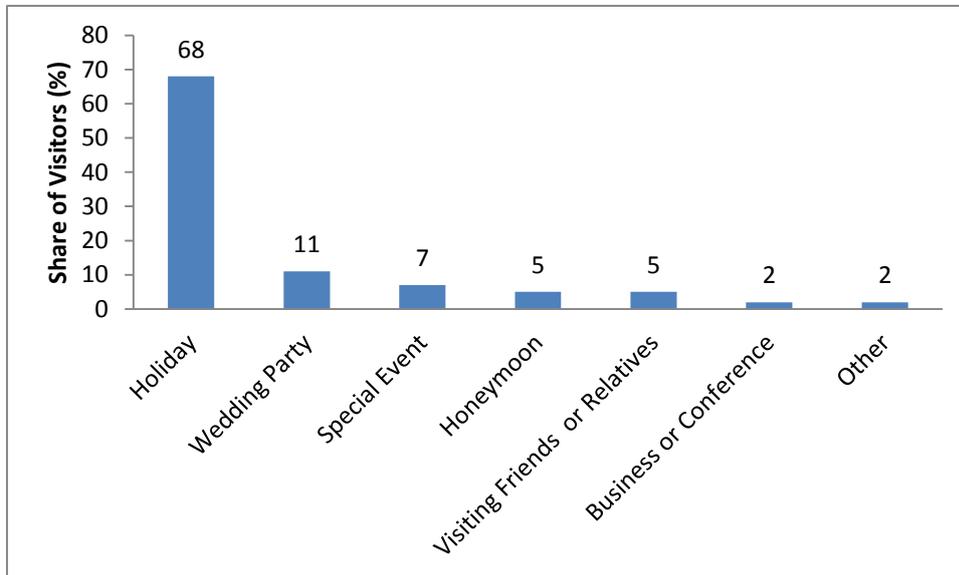
Most of the visitors (42%) have an annual household income of between NZ\$50,001 and \$100,000. A further 20% earn between NZ\$100,001 and NZ\$150,000 (Figure 4). Nearly one quarter (22%) of the respondents have a household income of over NZ\$150,000 per year. Visitors to the Cook Islands earn significantly more money than the average New Zealander or Australian (latest national statistics show a median household income of NZ\$67,808/NZ\$79,300).

Figure 4: Annual Household Income in NZD (n=430)



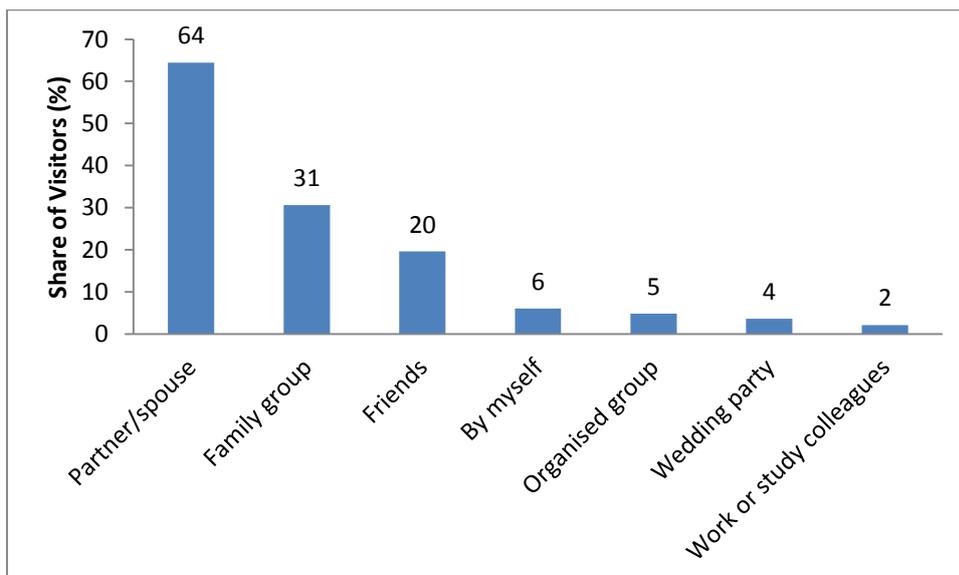
The majority of visitors surveyed from January to March 2013 come to the Cook Islands for a holiday (68%), with the second major purpose of visit being to attend a wedding (11%). Just 7% of respondents came for special events, and 5% came for honeymoon or visited friends/relatives (Figure 5).

Figure 5: Main Purpose of Visit (n=1368)



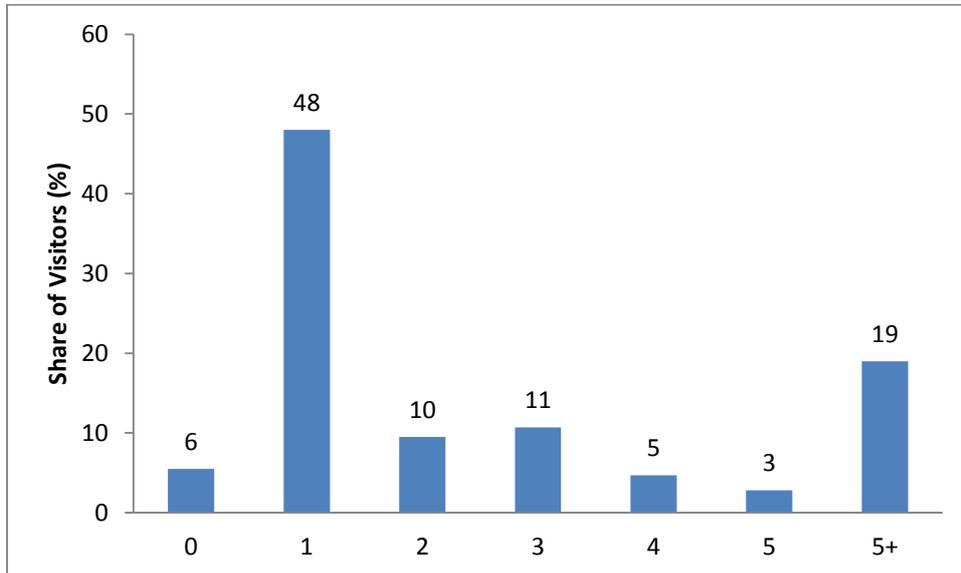
Just under two thirds of the visitors (64%) travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (31%) or friends (20%). Those travelling alone, with a wedding party, with colleagues or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with who? (n=1785)



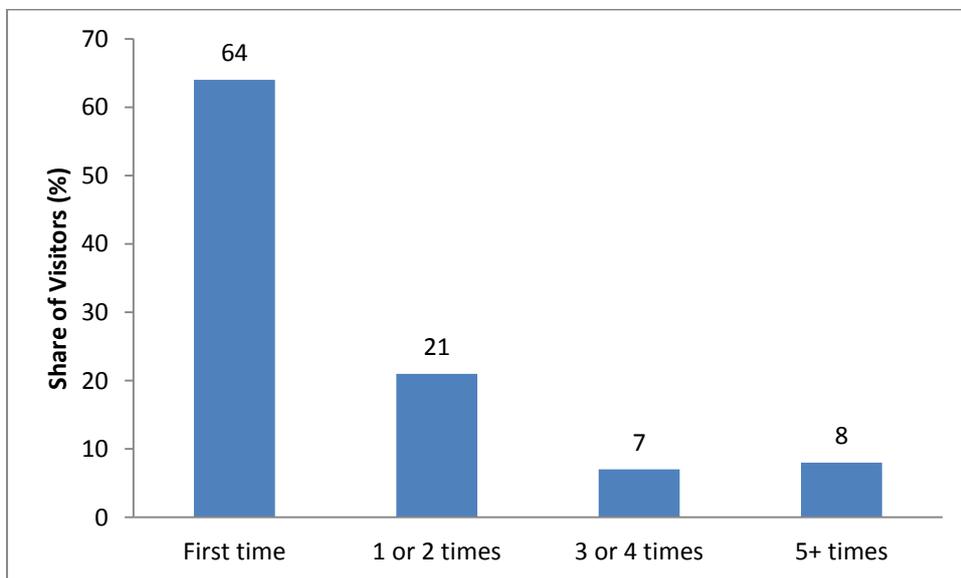
Most visitors (48%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=1351)



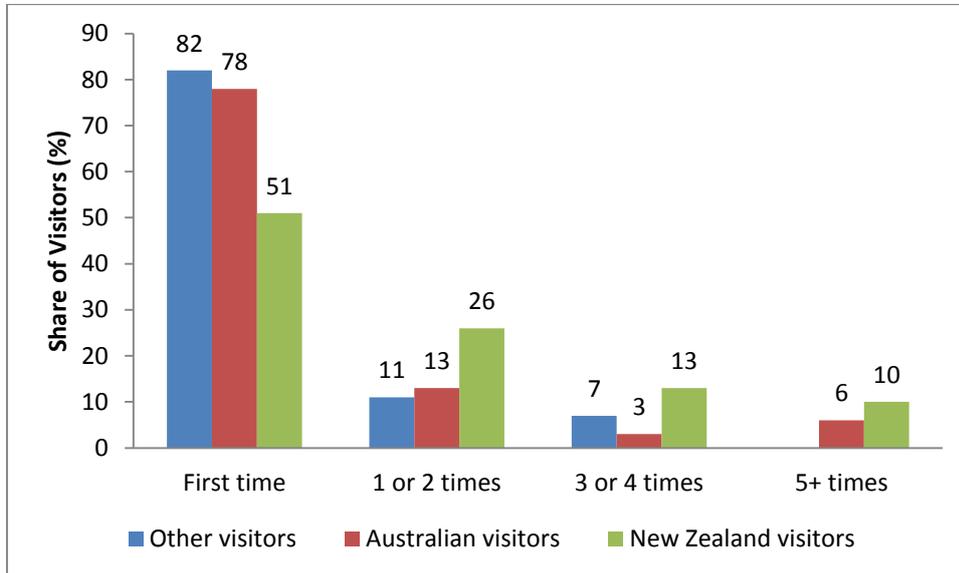
Most visitors (64%) are on their first visit to the Cook Islands. A further 21% have been to the Cook Islands once or twice before. A smaller group (15%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=1178)



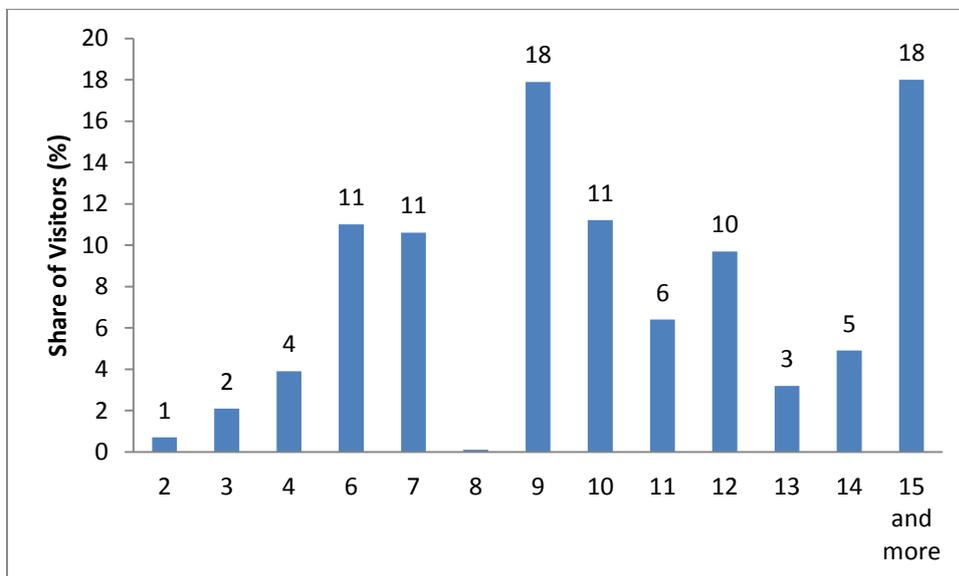
New Zealand visitors are more likely to be repeat visitors than those from other source markets (Figure 9). Twenty-six percent of New Zealanders have visited one or two times before compared to 13% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=1178)



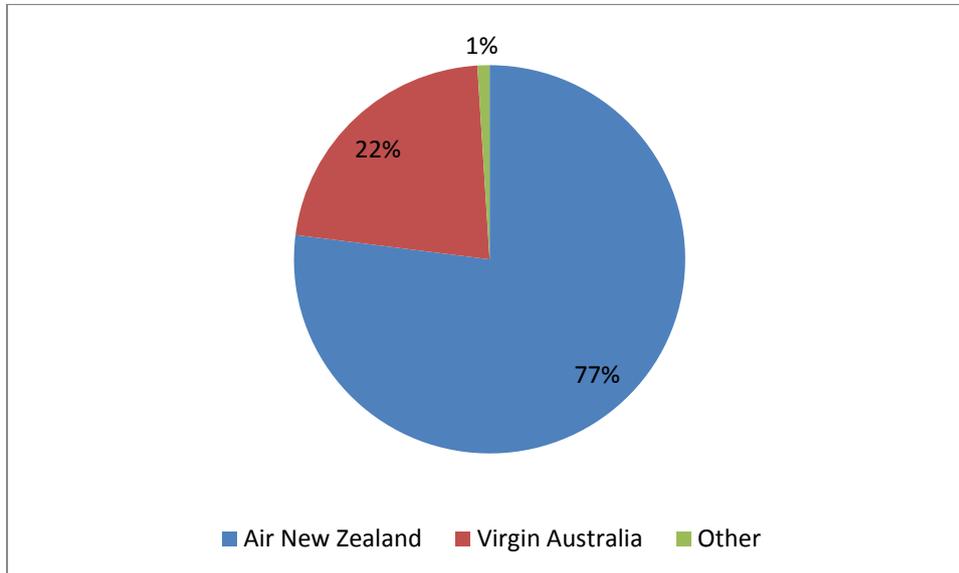
The average length of stay in the Cook Islands is 9.9 nights with 58% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=1355) mean = 9.9 nights



Most visitors surveyed (77%) travel to/from the Cook Islands with Air New Zealand, a further 22% fly with Virgin Australia (Figure 11). Most passengers on those airlines fly out of Auckland or transit through Auckland. Fewer than 1% of visitors travel with Air Tahiti Nui or by private charter plane.

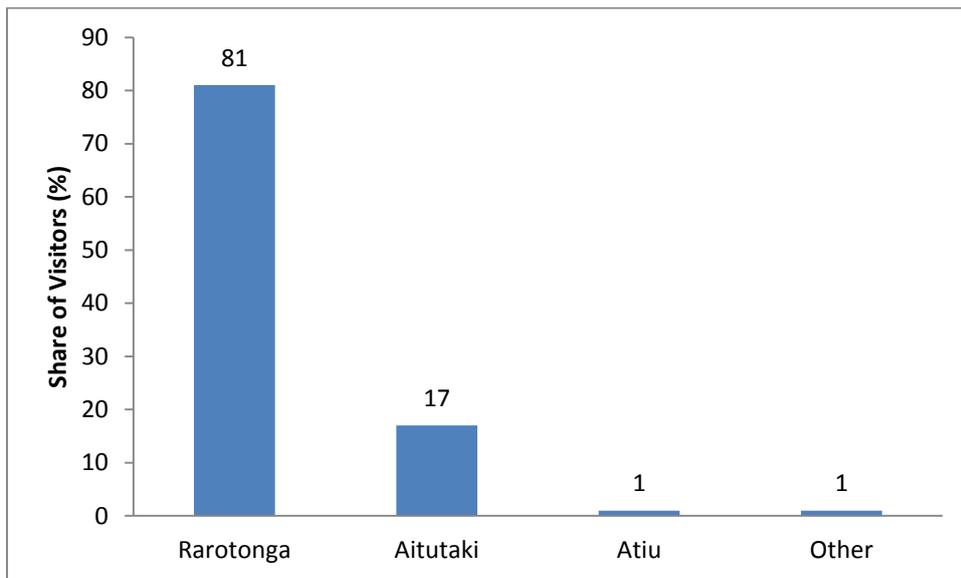
Figure 11: Airline used (n=1359)



For 82% of visitors, the Cook Islands is the only destination on their trip. For 18% of visitors the Cook Islands is part of a larger journey such as an around-the-world trip. When asking these visitors what other destinations were included there were 49 different destinations stated. The top destination mentioned was New Zealand, where 79% of visitors mentioned it as part of their larger trip. Second was Australia, which was mentioned by 31% of respondents. A quarter of visitors stated the USA was part of their larger trip and 14% mentioned Hong Kong. Other destinations each mentioned by 3-4% of respondents included Singapore, Tahiti, Thailand, Fiji, Cambodia, Canada and Japan. The rest of the destinations were mentioned by only 1 or 2 visitors each and included Argentina, Egypt, Tonga, Germany, Rwanda and Cuba.

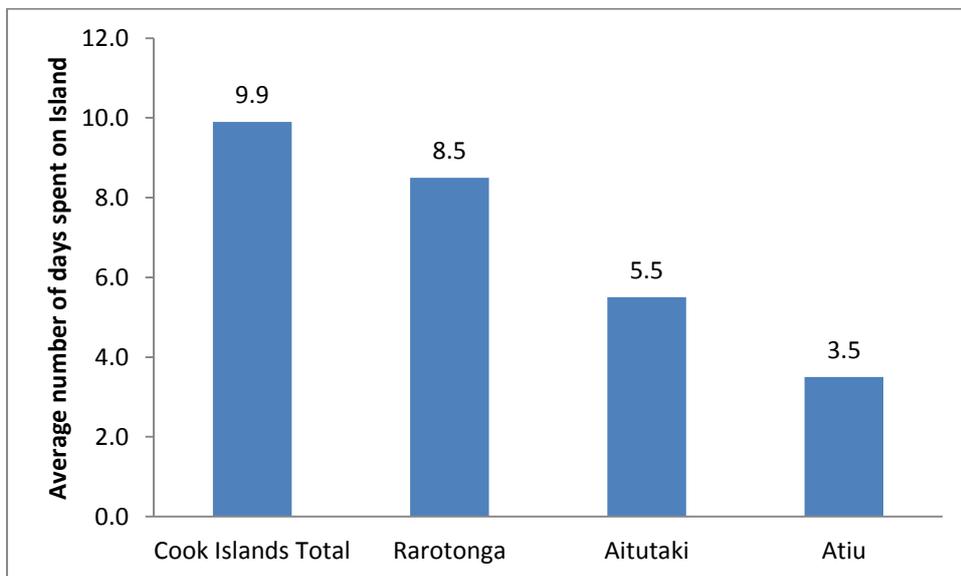
The majority of visitors (81%) to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (17%) (Figure 12). The other islands receive very few visitors.

Figure 12: Visited Islands (n=1363)



The average length of stay on Rarotonga is 8.5 days (Figure 13). For the visitors that went to Aitutaki, the average number of days spent on the island is 5.5 days. The average length of stay on Atiu is 3.5 days.

Figure 13: Average length of stay in the Cook Islands (n=1355)

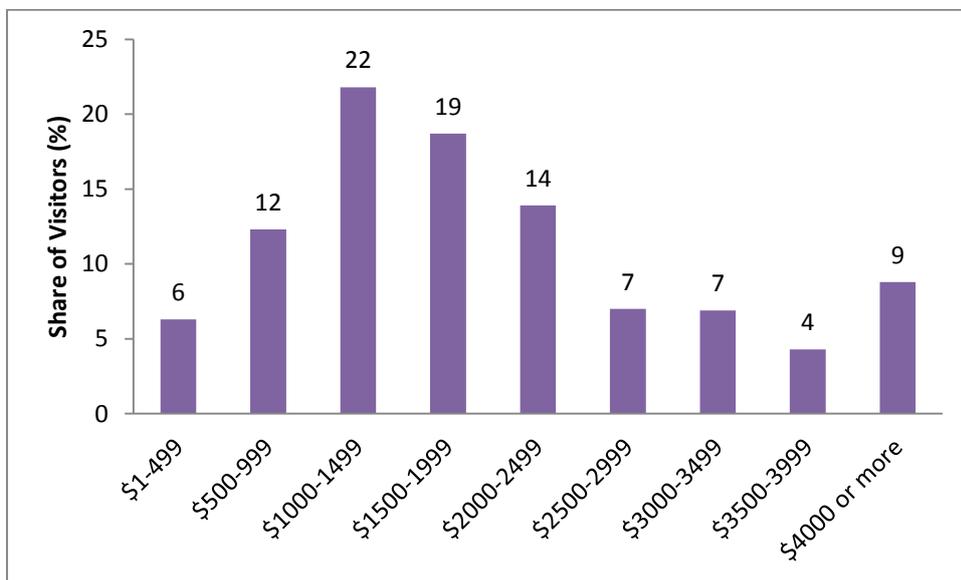


Visitor Expenditure

The survey asked a range of questions about visitor expenditure, both prior to arrival and also while in the Cook Islands. All the figures below are based on respondent estimates of their own spending and those they spent money on (e.g. spouse and children). The following expenditure section is based on the number of adults and children that respondents included in their cost estimates - a total of 3047 people comprising 2715 adults and 332 children.

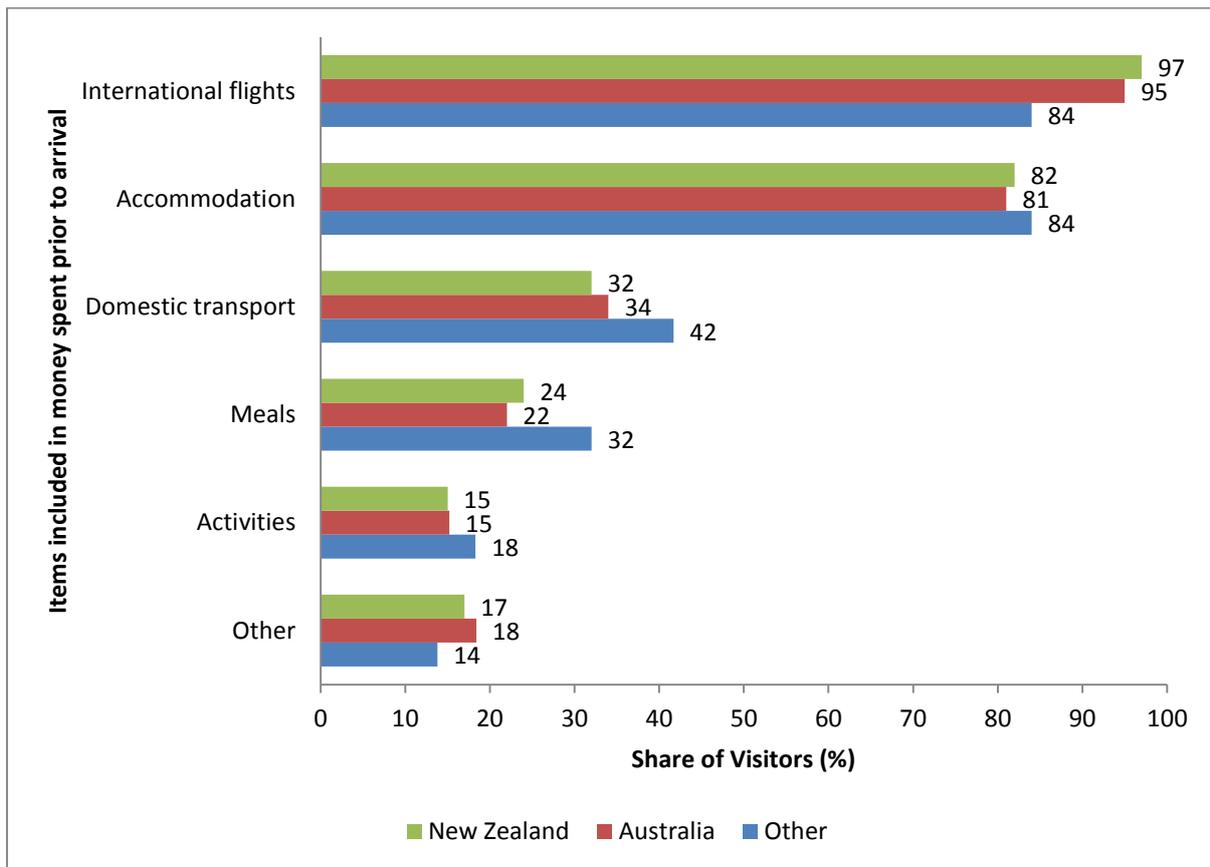
On average, visitors to the Cook Islands spend NZ\$2,072 per person prior to arrival. Almost all visitors (94%) spend at least \$500 per person prior to their trip since they have to pay for their international flights (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=1071)



Spending prior to arrival often includes accommodation: in 82% of the cases for New Zealand 81% for Australian visitors, and for 84% of visitors from other countries (Figure 15). Meals and activities are less likely to be included in prepaid expenses.

Figure 15: Items included in money spent prior to arrival (n=1115)



It is very difficult to accurately estimate the proportion of the pre-paid spend that flows to the Cook Islands. For the purposes of this study, and based on previous research in the region, we estimate that 50% of the prepaid spend is allocated to airfares, and that 80% of the remaining 50% of the prepaid spend flows back to local operators. In total this means that for every prepaid dollar 40 cents flows to the Cook Islands. We estimate that the prepaid spend figure per day, excluding flights, is \$84 and for the average visit is \$829.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$100 (Table 1). This figure is slightly lower than the previous quarter (\$109). Most money spent locally is on restaurants, cafes and bars (28%), accommodation (25%), shopping (14%), and groceries (7%). When daily spend is multiplied by the average stay (9.9 days) it is evident that each visitor spends on average \$990. The total figure of what is spent locally and what flows back to the Cook Islands from prepaid expenses is \$184 per visitor per day (\$100 plus \$84), or \$1,819 (\$990 + \$829) per total personal visit.

Table 1: Average visitor expenditure in the Cook Islands (per person per day)

Expenditure Items	Overall n=1217	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	28	28
Accommodation	25	25
Shopping	14	14
Groceries	7	7
Vehicle rental	7	7
Activities	6	6
Domestic flights	4	4
Other	4	4
Petrol	2	2
Cruising	2	2
Public transportation	1	1
Total expenditure per person per day	\$100	100%

Table 2 provides an overview of the in-country expenditure by visitor country of origin. North Americans generally spend more than Australians and New Zealanders. Europeans spent more than Australians and New Zealanders.

Table 2: Average expenditure per visitor per day by country of origin

Expenditure Items	n=127	n=294	n=662	n=102
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	26	28	30	24
Accommodation	35	25	23	40
Shopping	17	16	14	16
Groceries	9	7	7	8
Vehicle rental	5	7	8	3
Activities	9	7	6	4
Domestic flights	7	4	3	7
Other	2	5	4	2
Petrol	1	2	2	1
Cruising	8	2	2	3
Public transportation	1	1	0	1
Total spend (NZ\$)	\$121	\$102	\$99	\$108

Australian spend (\$102) was lower than in the 1st (\$164), 2nd (\$151) and 3rd (\$109) quarters. European visitor spend at \$108 per person per day was up from \$72 in the 3rd quarter but down from 1st (\$129) and 2nd (\$132) quarters. USA/Canada spend was lower in the 4th quarter compared to other quarters (\$147, \$148, \$139 and \$121 for 1st, 2nd, 3rd and 4th quarters respectively). New Zealanders also spent more in the previous three quarters with \$130 in the 1st quarter, \$136 in the 2nd quarter and \$109 in the 3rd quarter – compared to \$99 per visitor per day for the 4th quarter period covered by this report.

Visitor Satisfaction

Visitors were asked to indicate their overall satisfaction with their experience of the Cook Islands on a scale from 1 'very dissatisfied' to 5 'very satisfied' (Figure 16). Just over two thirds (67%) of the visitors surveyed ranked their experience as 'very satisfied'. Very few visitors (2%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=1190)

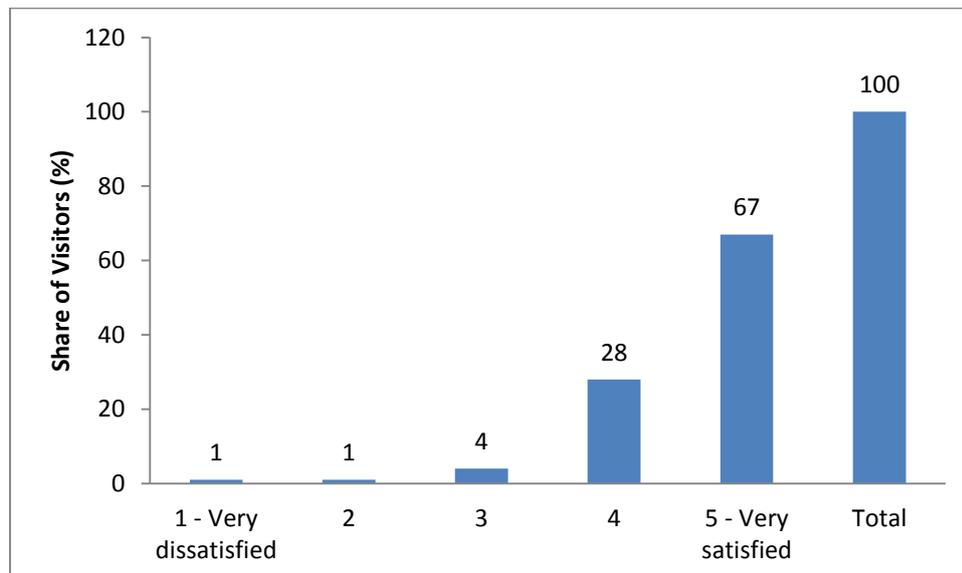


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (84%) visit a local market, and 67% of visitors experience an Island Night and Feast Show. Visitor satisfaction is generally high for all activities undertaken (all registering more than 4 out of a possible high of 5). Cultural interaction activities rank highest (average satisfaction of 4.6) followed by water based activities (4.5) and land-based activities (4.5), and shopping (4.3). It should be noted that some activities e.g. fishing and kitesurfing have relatively low 'n' values.

Figure 17: Degree of participation in activities (n range=21-1262)

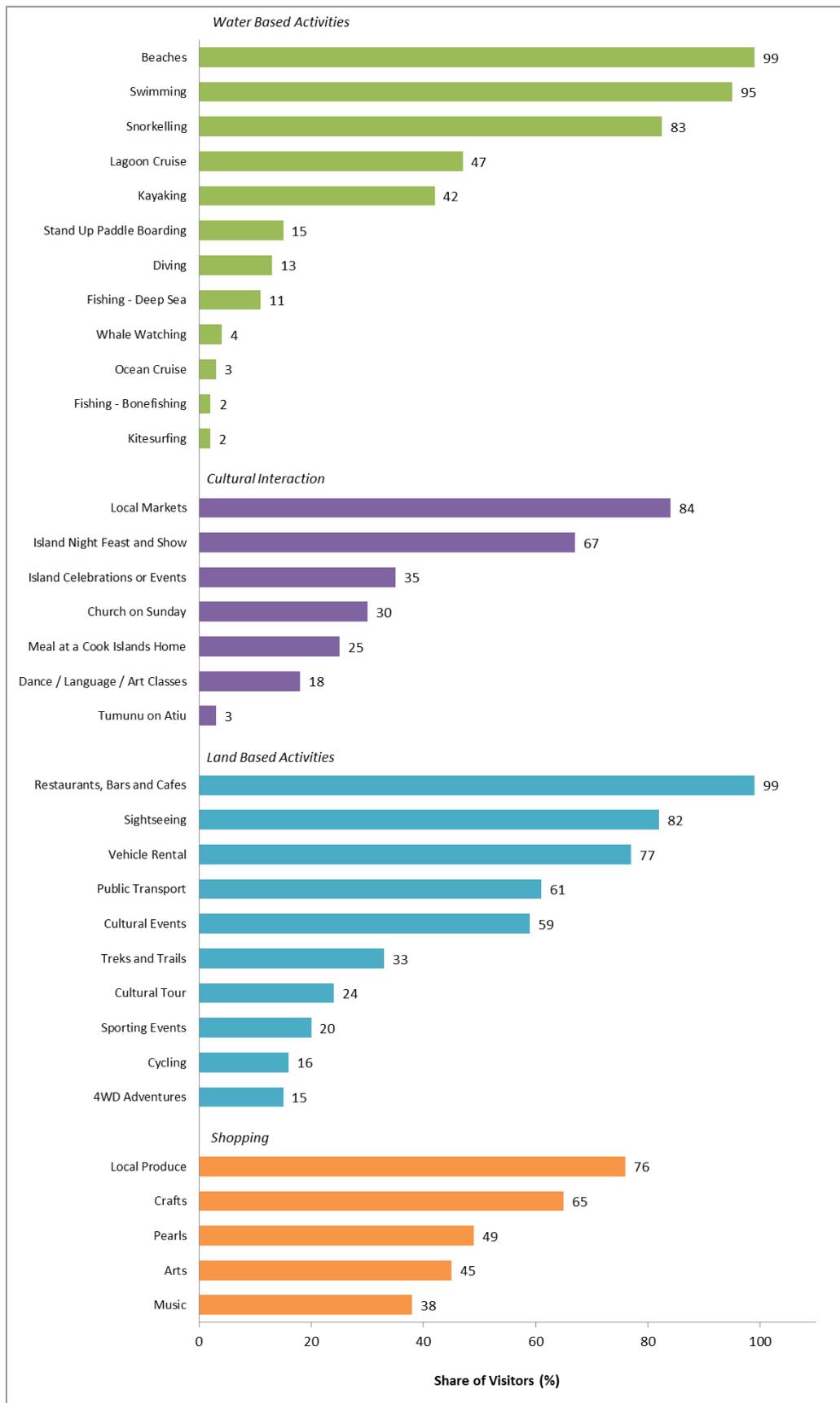
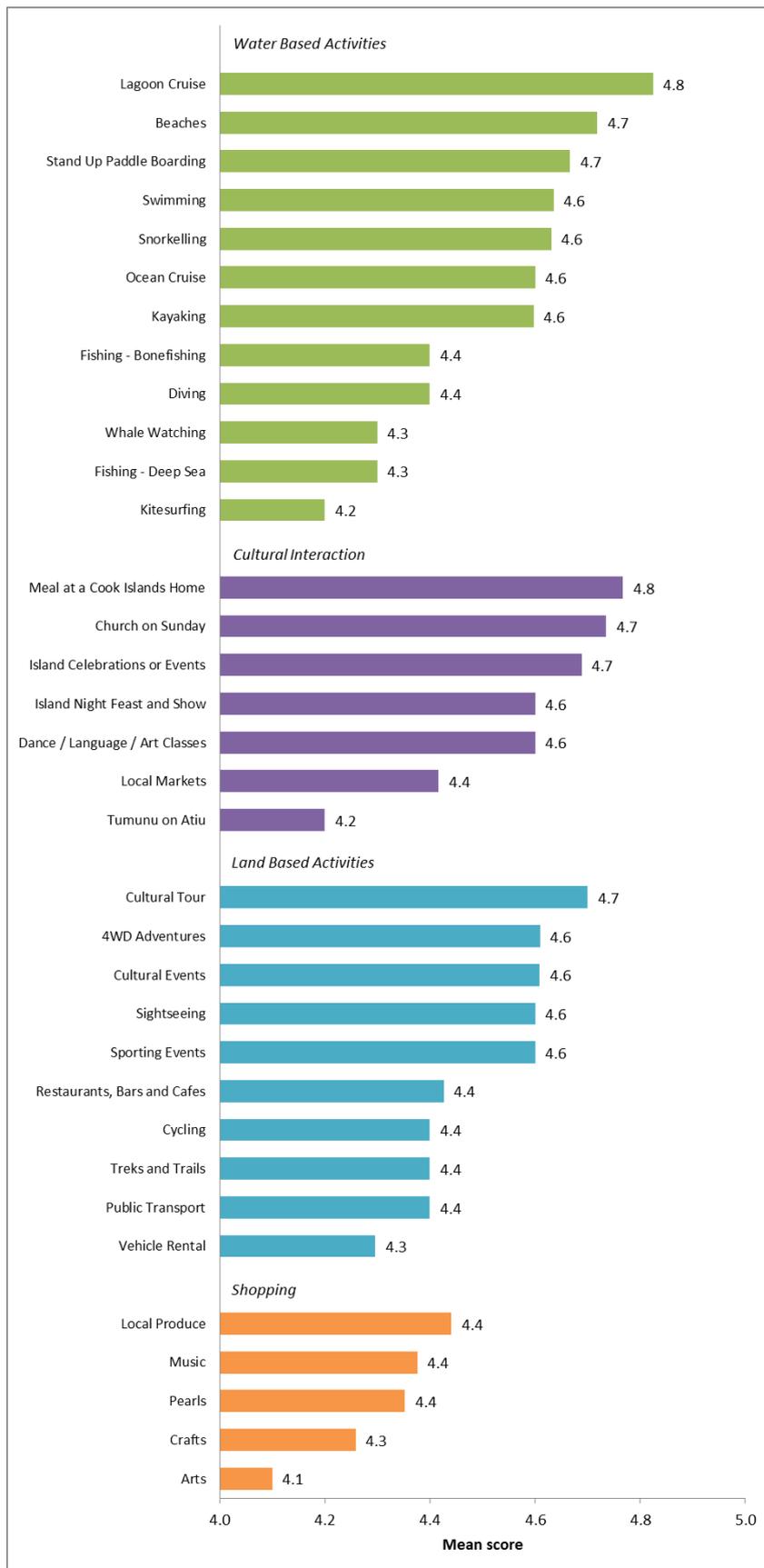
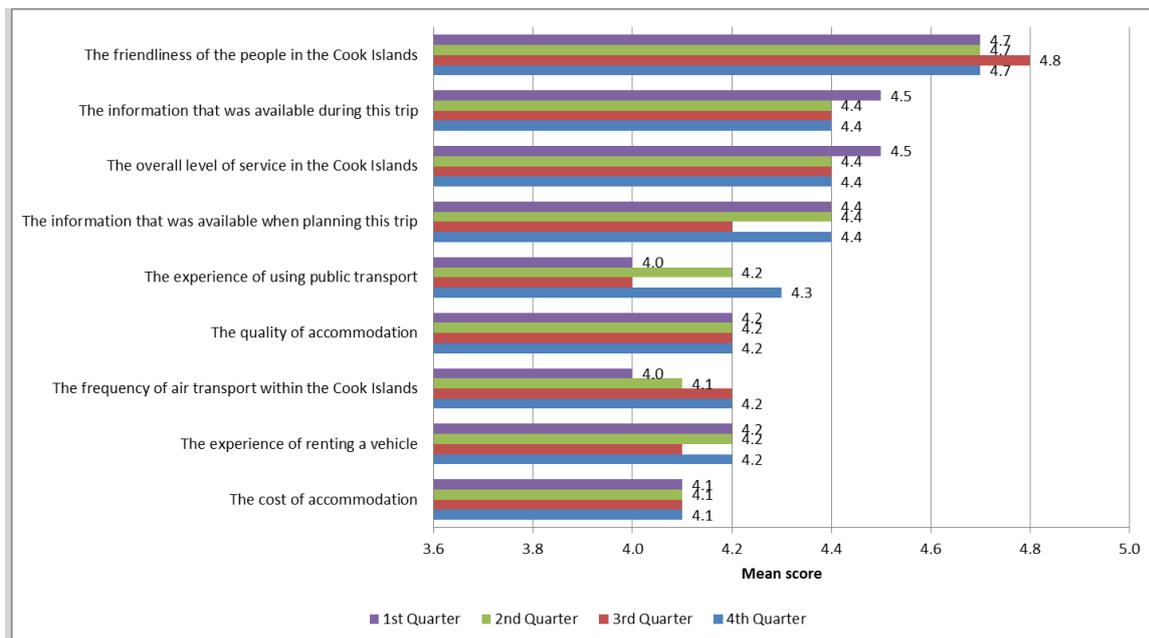


Figure 18: Degree of satisfaction in activities (mean score out of 5)



Visitors were asked to rate their level of satisfaction using nine different statements relating to their most recent visit to the Cook Islands (Figure 19). Responses from the first, second and third quarter are also compared in this figure. Overall, respondents give the friendliness of the people in the Cook Islands the highest score. The lowest levels of satisfaction relate to the cost and quality of accommodation, car rental experiences and both air and local public transport. In no cases though do scores fall below 4 out of 5. There is a high degree of consistency in satisfaction scores across the four Quarters.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5)



Most appealing aspects of the Cook Islands

Visitors were asked “What did you find most attractive or appealing about the Cook Islands on your most recent visit?” The responses were then categorised by the NZTRI team (Table 3). The most appealing elements of the Cook Islands experience are the beautiful natural environment friendly local people, and the peacefulness and relaxing atmosphere of the islands. Smaller numbers of visitors mentioned activities and entertainment, the affordability of food and beverage, the convenience of travelling to the Cook Islands and accommodation.

Table 3: Most appealing aspects of the Cook Islands (n=2261)

Themes	Share of respondents (%)
Environment	55%
Local people	48%
Atmosphere- peaceful and relaxing	28%
Activities, attractions and entertainment, events or weddings	21%
Food and beverage	9%
Affordability and un-commercialised	8%
Convenience	6%
Service	6%
Accommodation	4%
Overall good experience	4%

* Share of respondents who made a comment that falls into each theme. Respondents could give more than one answer, so total does not add up to 100%.

Local people

More than half (55%) of the visitors noted that the most appealing part of their visit was the interaction with the local people in the Cook Islands. There was emphasis on the friendliness and hospitality of the local people, as well as their fascinating lifestyle and culture. Key words that dominated the responses included “friendly”, “happy”, “lovely”, “welcoming” and “helpful”.

Comments included:

"Local Rarotongans are so helpful and polite; the rest of the world can take a leaf out of their book."

"All the locals are so approachable and willing to help tourists."

"The locals are so friendly, always greeting us with big happy smiles and a Kia Orana".

Environment

Nearly half (48%) of the respondents considered the environment to be the most appealing aspect of their Cook Island’s experience. Most comments that were made focused on the beauty and the cleanliness of beaches and lagoons, the beautiful views, good climate and the unspoilt mountains.

Comments included:

"Most attractive was the beautiful unspoilt beaches, the marine life is fantastic."

"We love that the nature of the island is so diverse; tropical forests, beaches to die for and sunny hot days all year round."

"Waking up and looking out from our villa was the most amazing blue sea, the waves lapping the beach. It's heaven!"

Atmosphere

Just under a third of survey respondents (28%) appreciated the relaxed atmosphere of the Cook Islands. They considered the Cook Islands to be a very "relaxed", "peaceful", "safe" and "tranquil" destination. Respondents underlined the islands as being a "perfect spot" for relaxing and feeling "totally refreshed", as well as having a "relaxed vibe" and "feel safe vibe".

Comments included:

"The place is just so relaxed and tranquil; it's a perfect holiday destination to get away from it all and have some R & R."

"After working all year in New Zealand it's a perfect place to take a break without having to travel too far away."

"There was no feeling of compulsion to buy things in the shops; it's laid back and relaxed in that sense and I like that most about Raro."

Activities, attractions and entertainment, events or weddings

Activities and entertainment was mentioned by 21% of respondents. Most comments in this category focus on the water-based activities such as lagoon cruises, swimming, diving and snorkelling. Other land-based activities that were mentioned included travelling around the island by scooter, walking, shopping, cultural tours and events such as Vaka Eiva and family weddings.

Comments included:

"Diving was fantastic and our instructors made such an effort to show us all the beauties of the reef."

"The cultural shows were the best; I actually think they are the best I have ever been too! Meitaki Mata guys!"

"Snorkelling is by far the best I have experienced in any of the Pacific Islands; such variety of fish and marine life makes it awesome."

"My daughter and her husband got married and the wedding was far more than we expected, it was romantic and beautiful. Certainly was a day to remember for all of us."

Food and beverage

Food and beverage was mentioned by 9% of visitors and the nature of responses highlighted that the options are “delicious” and “high quality”. More regular visitors also commented that local food is becoming more readily available for tourists to enjoy.

Comments included:

"We still find new great places to eat out when we return, our favourites are Vaima's and Trader Jack's for seafood."

"There is becoming more and more availability of local foods. We loved the tuna at Wilmore's, and it was so cheap."

Affordability and Un-commercialised

Approximately 8% of respondents mentioned the Cook Islands being a place that is “not over-commercialised” , “over developed” and that it is “affordable”. Some visitors also emphasised the importance of preserving the destination from mass tourism development in the future and keeping it attractive as a destination. Comments included:

"Now there is no departure tax, it's a nice touch and it makes it that much more affordable."

"Cheap. Probably because the place isn't over commercialised like many other islands such as Fiji."

"We love that the Cooks aren't touristy like many other destinations; it makes a nice break away."

Convenience

Six percent of visitors commented on the convenience of the Cook Islands as a destination. This was outlined by the idea that the Cook Islands is “close to home”, a “short-flight away” and that the island is “small and accessible” and “handy to get around”.

Comments included:

"Short flights from home means that we can nip up several times a year for a break."

"... using NZ dollars makes it so easy "

"Everything is so close and handy to access, it's great!"

Level of Service

A few visitors (6%) commented on the service they encountered while in the Cook Islands as being an appealing feature of their trip. Some positive comments identified the staff in the

restaurants/bars/hotels and tour operations being helpful and going beyond expectations. Comments included:

"Service staff were outstanding; they remembered us from our previous visits and made us feel really taken care of."

"Services like the bus are great; we could jump on and off as we pleased and the driver was helpful and friendly."

Accommodation

Accommodation was mentioned by a lesser amount of respondents (4%). In the responses key words used to amplify visitors' experience were *"best"*, *"outstanding"* and *"perfect"*.

Comments included:

"The resort we stayed at on Aitutaki was the best; I wouldn't hesitate to go back."

"We stayed in private accommodation and it was perfect; close to the beach, the shops and to the Church for Sunday services. What more could one want?"

Overall good experience

A small number (4%) of respondents decided not to focus on a specific appealing dimension of their trip to the Cook Islands and instead stated that their whole experience of the Cook Islands was a good one. Positive adjectives used to describe visitors' experience included *"fabulous"*, *"amazing"* and *"beautiful"*. Comments included:

"The whole trip was fabulous, and I have already booked to return."

"I fell in love with the Cook Islands, have been back many times and I will continue to do so!"

"The whole trip was just awesome, I loved it!"

Least appealing aspects of the Cook Islands

Visitors were also asked *"What did you find least attractive or appealing about the Cook Islands on your most recent visit?"* Just over a fifth (21%) of visitors noted they found nothing was 'least appealing' or that there was 'nothing to complain about', responding with comments such as *"I loved everything"* and *"We could see no negative aspects"*. There were, however, a number of areas that did attract comment (Table 4).

Table 4: Least appealing aspects of the Cook Islands (n=1131)

Themes	Share of respondents (%)
Nothing to complain about/ having to leave	21%
Public services and facilities	17%
Price of goods and services	15%
Poor weather (cyclone weather)	15%
Stray animals (dogs, chickens) and mosquitoes	10%
Rubbish & natural environment care	10%
Accommodation	9%
Food and beverage	8%
Safety & poverty	6%
Flight-related issues	5%
Rental cars/ scooters	4%
Attractions and activities	4%
Local people	3%

* Share of respondents who made a comment that falls into each theme. Respondents could give more than one answer, so total does not add up to 100%.

Public services and facilities

Seventeen percent of survey respondents expressed their disappointment about service, facilities and infrastructure in the Cook Islands. In particular complaints were made about the frequency of public transport, range and opening hours of retail shops (as well as the service provided within the retail stores), the lack of supply of petrol and water, along with poor cell phone and internet services. Comments included:

"Service was slow and not up to standard; we were disappointed. Not to mention the unfriendly opening hours of the shops."

"There is a lack of Wi-Fi hot spots and calling rates are extremely high."

"Roads are terrible, they all need to be done like the airport side."

"The island ran out of petrol which was a real pain considering we rented a car."

"While we were there, there was a low water supply for the local people."

Price of goods and services

Some (15%) visitors made specific comments about the high prices of food and beverage, hotel accommodation, activities and the calling rates. Respondents mentioned that the Cook Islands was an expensive destination to visit, and did not always provide good value for money. Several respondents expressed dissatisfaction with the internet costs and the car licence costs, describing them as *"inconvenient"* and *"extraordinarily large"*.

Comments included:

"EVERYTHING is so expensive; it makes it hardly affordable for most people to visit again."

"Prices are well over the top, I know they have to import a lot of goods but the prices are whacked up too high."

"Food prices in the supermarkets are crazy, \$12 for a cabbage, you got to be kidding me."

"Calling prices and internet prices don't reflect money's worth."

Poor weather

A number of visitors (15%) mentioned that the poor weather mainly due to cyclone Gary was the least attractive aspect of their visit to the Cook Islands. Although visitors were disappointed with the "lack of information" when referring to the bad weather associated with cyclone Gary many visitors understood and pointed out that this was unpredictable and there wasn't much that could be done to prevent this aspect of their trip. Comments included:

"The weather was less than ideal but that's unpredictable."

"Cyclone Gary hitting the islands was a little nerve racking, and there was little warning and information provided before."

Stray animals and mosquitoes

Some visitors (10%) said the stray dogs and chickens and mosquitoes were an annoyance during their time spent on the island. Comments included:

"The stray dogs and chickens are annoying, especially on the beaches."

"The mozzies are a real pain but hey what can anyone do."

Rubbish and natural environment care

One in ten visitors (10%) mentioned rubbish and the lack of care of the natural environment in the Cook Islands as unappealing factors. Glass on the beach, dirty streets and waste/household rubbish in drains were often commented upon. A perceived lack of awareness about conservation on the part of the local people, and the poor condition of the lagoons, reefs and marine life, also concerned a small group of visitors. Comments included:

"The rubbish in the back streets and along some beaches was appalling."

"Burning of rubbish is disgusting; it was blowing right across the road into the hotel complex."

"Raro you need to step it up a notch, glass on the beach and waste runoff right onto the beach, you're killing your environment."

"The beaches and lagoons weren't quite as clean as we thought they would be."

"Glass on the beach is something I was worried about, what about the kids running around?"

Accommodation (expense and quality), food and beverage (cost, quality and availability), safety (petty theft), flight-related issues (timing, delays), rental cars and scooters (quality and cost), attractions and activities (limited range) and local people (existence of poverty, occasional lack of friendliness) were other unappealing aspects mentioned by visitors. Often visitors perceived these issues as being second to other unappealing aspects but believed that these issues contributed to a negative view of the Cook Islands and therefore worth mentioning.

Comments included:

"Ant problems in the rooms and our air conditioning didn't work, which made nights unbearable."

"Where is the local food? We couldn't find it easily."

"The poor housing and lack of money for the locals is saddening, it's obviously a hard life for some here; also the dogs are a sad sight for any animal lover."

"Early morning flights aren't the best, we would have liked to see an overhead view of the island during the day."

"The car was in such bad shape that I thought it would fall apart while we had it; DANGEROUS!"

"There needs to be more cultural tours and historical attraction for tourists to be able to be involved in. Some authentic cultural experiences wouldn't go a miss."

"Locals working in various places were often drunk, tired and obviously didn't want to be working there."

Suggestions to improve the visit to the Cook Islands

When asked if there was anything that could have improved their visit to the Cook Islands, just under half (45%) of respondents said 'yes'. Suggestions mentioned by respondents focused on services and friendliness of people (10%), local transport options (9%), quality of food (9%), quality of accommodation (9%), flight times (8%), weather (7%), information and signage (7%) and rubbish and hygiene (6%). Comments on these themes included:

"It seems most of the staff hate their jobs, they are often tired and complaining to other staff members and aren't willing to be helpful to visitors."

"The transport like buses and transfers are disorganized, often late or simply do not turn up."

"Food is bland and lacks local flavour and ingredients. Visitors want some local cuisine using local produce when they visit a place."

"The resort needs renovation, especially the toilets and other facilities"

"It is unpleasant to fly in the middle of the night, especially with small children as their biological clock gets very upset and makes for a tiresome holiday."

"There is a lack of information on attractions, hiking trails and shopping on Rarotonga."

"We witnessed numerous hygiene blunders by hotel staff especially in the restaurant and bar."

Reasons to return to the Cook Islands and recommend to others

The majority of visitors (93%) indicated that they would consider re-visiting the Cook Islands. It is clear that most people thought the Cook Islands provided a wonderful experience due to the overall beauty, unspoiled natural environment, friendly people and relaxing atmosphere of the place. These four themes cover the majority of responses.

Those who mentioned that they had an overall great experience mentioned that the Cook Islands was *"beautiful/wonderful"* (37%), and that they had found *"paradise", "a heavenly place" or a "perfect place"* and were *"eager to return"* and *"recommend the island nation to everyone"*. Comments included:

"It is as close as you can get to paradise on Earth."

"The Cook Islands are the best place we ever visited, especially compared to other islands in the Pacific."

The unspoiled environment and natural beauty of the Cook Islands is the second largest pull factor to the islands; identified by 31% of tourists. Tourists had a real attachment to the *"natural scenery", "incredible lagoons"* and the *"lack of commercialization and development."* Comments included:

"It is unspoiled nature, as it should be."

"I admire the natural beauty of Aitutaki...it is...well, what can be said other than spectacular."

"I urge the Cook Islands and its people ...do take care of your environments as it is so beautiful and unique, it mustn't be over-developed like Fiji and Hawaii."

Approximately 20% of the visitors identified the friendly people and hospitality as the third most significant feature encouraging them to return to the Cook Islands. Visitors commented:

"The friendly people really make it a great experience."

"The helpfulness and attentiveness of resort staff is highly valued and appreciated, they are amazing."

The relaxing island atmosphere and laid back lifestyle of the local population was noted as the fourth most attractive feature of the Cook Islands, with nearly 10% making reference to this theme:

“A great place for some much needed R&R.”

“Why are the Cook Islands great because you can just do nothing but relax on the beach, enjoying the sun, breeze and incredible colours of the sea.”

Those few respondents (n=77) who said they would not be returning to the Cook Islands, gave reasons such as: *“it is too expensive”, or “there are other places to go to”* and the Cook Islands are simply *“too far away”*. Other reasons for not returning included ‘not enough activities to do’, ‘the bad weather’ and the ‘poor quality of accommodation’, ‘bad service’, ‘poor food’ and ‘not enough value for money deals’.

Out of the 93% of the visitors that said they would like to return to the Cook Islands, the majority (81%) mentioned that they would like to include the outer islands to their next visit. Most (69%) of the visitors surveyed between January and March mentioned they would like to include Aitutaki in their visit. ‘Atiu’ was the second most mentioned island at 13%; 11% of visitors stated that they were ‘not sure’ or ‘needed more information’ before making a decision on which islands to include, and 9% of visitors mentioned they would like to visit ‘all the islands’.

‘Mangaia’ was mentioned by 5% of visitors as an island they would like to include, and 3% mentioned visiting ‘Manahiki’. ‘Mauke’ was mentioned by 2% of visitors, and another 2% also indicated they would only include the other islands if they were more ‘affordable’. The remaining 1% of visitors mentioned other islands: Penrhyn, Palmerston, the Northern group, Pukapuka, Mitiorea, Suvarrow and Nassa.

Nearly all visitors surveyed (98%) said that they would recommend the destination to their family and friends. Forty-one percent of visitors mentioned they would recommend the Cook Islands because of the ‘atmosphere’; generally this was the ‘relaxing’ and ‘peaceful’ atmosphere that visitors experienced while in the Cook Islands. Visitors felt that the Cook Islands was a great place to ‘get away’, ‘unwind’ and ‘relax’ and therefore thought it made a great holiday destination for those who needed this kind of holiday experience.

Thirty-nine percent of respondents stated that the ‘environment’ of the Cook Islands was a reason for recommending the island nation to others – including beaches, cleanliness, clear waters, climate and temperature. Thirty-three percent of respondents saw the Cook Islands as an ‘overall great place’, 26% mentioned the ‘friendly and helpful local people’, and 10% would recommend the Cook Islands because of the ‘attractions and activities’ available to visitors. Convenience of the trip (both location-wise and ease of the holiday) was mentioned by 8% of visitors. Other themes that were mentioned included the islands being un-commercialised (7%), affordability of the holiday (7%), food and beverage (4%), ease of currency and language (4%), culture (3%), honeymoon/ weddings/ celebrations (2%), service (2%), accommodation (2%) and a small number (<1%) mentioned volunteer work.

Only 4% of visitors mentioned that ‘there are negative aspects’ that they would tell others about. These include: ‘Rarotonga is too commercialised’, that there are ‘places closer to home better suited’, there is ‘not enough to do if staying for a long time’ and that ‘some local people are not friendly’.

Final observations

This report shows that in many ways the Cook Islands tourism industry performed well during the January - March 2013 period. Visitor satisfaction levels and the desire for return visitation have remained very high, and it is clear that the destination is leaving a generally positive impression with tourists.

Nevertheless this report also highlights that there is room to enhance the visitor experience and to increase the economic yield and broader community benefits associated with tourism. As in the previous quarterly reports, this research highlights issues around environmental degradation and infrastructure provision that should be monitored and managed carefully. There are also some concerns by visitors around the value for money/quality of service provided by accommodation and food/beverage operations.

While visitor spend prior to arrival in the Cook Islands has increased from the previous quarter (\$1990 per person for 3rd quarter and \$2,072 per person for 4th quarter), spend on the island (per person per day) has slightly dropped from \$109 (3rd quarter) to \$100 (4th quarter)

Overall the Cook Islands sector is performing well but cannot afford to rest on its laurels. In particular it is important to look at ways to increase visitor yield in a sustainable manner that enhances local economic linkages.

Appendix – Cook Islands Visitor Survey



Cook Islands Visitor Survey

Information for Participants

Kia Orana and warm Pacific greetings to you. As a recent visitor to the Cook Islands, we invite you to participate in research designed to improve the visitor experience as well as support us to make good decisions for tourism in our beautiful island nation. The research is funded by the Cook Islands Tourism Corporation and conducted by the New Zealand Tourism Research Institute at AUT University, Auckland, New Zealand.

If you are a permanent Cook Island resident, thank you for your interest but this Survey is focused on non-resident visitors to the Islands.

We would like to know about your most recent visit to the Cook Islands and ask you to complete this Visitor Survey within two weeks of your trip if possible.

All answers are confidential and can in no way be linked to your personal details. By taking the survey you are giving your consent to be part of this research.

Participation is entirely voluntary. To participate in this research, simply click on the button below. The Survey asks a number of questions where you select your answer from a range of options given. Some questions ask you to type your comments in your own words into the box provided. We would appreciate it if you could fill this survey out as accurately as possible. All questions are optional. The survey will run until 30 September 2012.

This survey will take approximately 15 minutes to complete.

All answers are confidential and can in no way be linked to your personal details. By taking the survey you are giving consent to be part of this research.

[Take the survey](#)

Aggregated results of this research may be used in journal and conference publications. A summary of the results of this research will also be available on www.nztri.org in mid 2012.

For further information about this research contact:

Project Coordinator: Carolyn Deuchar, New Zealand Tourism Research Institute, AUT University: email carolyn.deuchar@aut.ac.nz, phone 09 921 9999 ext 8892

Team Leader: Professor Simon Milne: New Zealand Tourism Research Institute, AUT University: email simon.milne@aut.ac.nz, phone 09 921 9245

Approved by the Auckland University of Technology Ethics Committee on 13 December 2011. AUTEK Reference Number 11/335.

ABOUT YOUR VISIT

This survey is about your most recently completed visit to the Cook Islands. We would ask you to complete this survey within two weeks of your return home if possible.

(If you are a permanent Cook Islands' resident, thank you for your interest but this survey is focused on non-resident visitors to the Cook Islands)

By completing the survey you are giving consent to participate in this research.

1. When did you arrive in the Cook Islands on your most recent visit? (format dd/mm/yyyy, eg. 26/06/2012)

2. How many nights did you spend in the Cook Islands on your most recent visit?

3. What was the main purpose of your visit?

- Holiday
- Wedding party
- Business or conference
- Visiting friends or relatives
- Honeymoon
- Special event - sporting
- Special event - cultural
- Volunteering
- Education

4. How did you get to the Cook Islands? (tick as many as apply)

- Airline - Air New Zealand
- Airline - Virgin Australia
- Airline - Air Tahiti
- Ferry
- Private charter plane
- Private boat

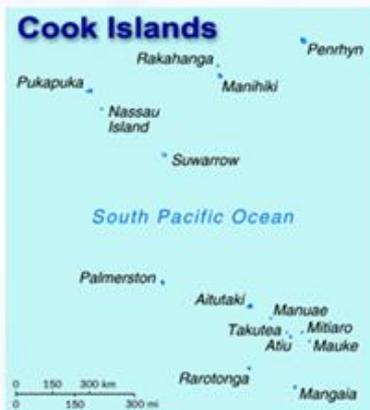
5. Who were your travelling companions? (tick as many as apply)

- No one - I was by myself
- Partner / husband / wife
- Family member(s)
- Friends
- Work colleagues
- Tour group
- Organised group (e.g. school, sports etc)
- Wedding party

6. How many people accompanied you on this trip?

 ▾

7.1 Which islands did you visit on this trip? Please provide additional information when prompted on the following page.



- Rarotonga
- Aitutaki
- Atiu
- Mangaia
- Mauke
- Other

7.2 How many nights did you spend on each island?

	Number of nights
Rarotonga	<input type="text"/> ▾
Aitutaki	<input type="text"/> ▾
Atiu	<input type="text"/> ▾
Mangaia	<input type="text"/> ▾
Mauke	<input type="text"/> ▾

7.3 Please select the accommodation(s) you stayed in on Rarotonga? (Hold down the CTL key to choose more than one accommodation)

- Aito Apartments Muri
- Aloha Mana
- Anchor's Rest
- Apartments Kakera - Rarotonga
- Aquarius Rarotonga
- Arcadia Cottage
- Are Mango Guesthouse
- Are Renga
- Aremango Guesthouse
- Aroa Beachside Inn

How satisfied were you with your stay at Aito Apartments Muri?

Very Dissatisfied (1) 2 3 4 Very Satisfied (5)

8. On your most recent visit to the Cook Islands, please indicate below the activities that you engaged in and how satisfied you were with your experience.

• Water based activities:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Beaches	<input type="radio"/>					
Swimming	<input type="radio"/>					
Snorkelling	<input type="radio"/>					
Diving	<input type="radio"/>					
Kayaking	<input type="radio"/>					
Fishing - Deep Sea	<input type="radio"/>					
Fishing - Bonefishing	<input type="radio"/>					
Lagoon Cruise	<input type="radio"/>					
Ocean Cruise	<input type="radio"/>					
Whale Watching	<input type="radio"/>					
Kitesurfing	<input type="radio"/>					
Stand Up Paddle Boarding	<input type="radio"/>					

• Cultural interaction:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Island Night Feast and Show	<input type="radio"/>					
Meal at a Cook Islands Home	<input type="radio"/>					
Church on Sunday	<input type="radio"/>					
Island Celebrations or Events	<input type="radio"/>					
Tumunu on Atiu	<input type="radio"/>					
Local Markets	<input type="radio"/>					
Dance / Language / Art Classes	<input type="radio"/>					

• Land based activities and Touring:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Restaurants, Bars and Cafes	<input type="radio"/>					
Cultural Events	<input type="radio"/>					
Sporting Events	<input type="radio"/>					
4WD Adventures	<input type="radio"/>					
Cultural Tour	<input type="radio"/>					
Treks and Trails	<input type="radio"/>					
Cycling	<input type="radio"/>					
Sightseeing	<input type="radio"/>					
Vehicle Rental	<input type="radio"/>					
Public Transport	<input type="radio"/>					

• Shopping:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Pearls	<input type="radio"/>					
Arts	<input type="radio"/>					
Crafts	<input type="radio"/>					
Music	<input type="radio"/>					
Local Produce e.g Coffee, Coconut Oil etc	<input type="radio"/>					

• Please tell us about any other activities you participated in

9. On your most recent visit, how satisfied were you with the following?

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
The information that was available when planning this trip?	<input type="radio"/>					
The information that was available during this trip?	<input type="radio"/>					
The cost of accommodation?	<input type="radio"/>					
The quality of accommodation?	<input type="radio"/>					
The experience of renting a vehicle?	<input type="radio"/>					
The experience of using public transport?	<input type="radio"/>					
The frequency of air transport within the Cook Islands?	<input type="radio"/>					
The overall level of service in the Cook Islands?	<input type="radio"/>					
The friendliness of the people in the Cook Islands?	<input type="radio"/>					

10. What did you find **most attractive or appealing** about the Cook Islands on your most recent visit?

11. What did you find **least attractive or appealing** about the Cook Islands on your most recent visit?

12. Is there anything that could have improved your visit to the Cook Islands?

No

Yes

EXPENDITURE

Information on how much money you spent during your visit helps the planning and development of the Cook Islands economy.

We would appreciate it if you could fill out this section as accurately as possible.

13. In the expenditure estimates you will provide below, how many people are included (including yourself)?

Adults

Children (0- 16 years old)

14.1 Please indicate below the total value of what you paid prior to your arrival to the Cook Islands (including purchases made via travel agents or the internet), in the currency specified in Question 14.2

14.2 Please select your currency:

NZD

AUD

GBP

USD

EUR

CAD

Other - please specify

14.3 What does this amount above include? (tick as many as apply)

International flights

Accommodation

Meals

Domestic transport

Activities

Other

15. After you arrived in the Cook Islands, how much do you estimate that you spent in each island in local currency (NZ\$)?

	Rarotonga	Aitutaki	Other island(s)	Total
Accommodation	0	0	0	0
Restaurants, Cafes & Bars	0	0	0	0
Vehicle Rental	0	0	0	0
Petrol	0	0	0	0
Domestic flights	0	0	0	0
Public transport	0	0	0	0
Cruising	0	0	0	0
Groceries	0	0	0	0
Shopping (e.g. souvenirs, clothes)	0	0	0	0
Activities (e.g. water sports, sightseeing)	0	0	0	0
Other	0	0	0	0

16. Was your recent visit to the Cook Islands part of a bigger trip?

- Yes
- No

17. Would you return to the Cook Islands? Why?

- Yes
- No

18. Would you recommend the Cook Islands to others? Why?

- Yes
- No

19. How satisfied were you with your overall experience of the Cook Islands ?

- | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Very Dissatisfied | 2 | 3 | 4 | Very satisfied |
| (1) | | | | (5) |
| <input type="radio"/> |

20. Please add any comments you would like to make about your overall experience of the Cook Islands.

ABOUT YOU

21. How many times have you been to the Cook Islands prior to your most recent visit?

22. Your age group:

- 18-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+

23. Your gender:

- Female
- Male

24. What is your highest qualification?

- No formal qualification
- High school qualification
- Tertiary/University qualification
- Other

25.1 What is your approximate annual household income in your home currency?
Please use the following format: eg. 50,000 and specify currency in question 25.2.

25.2 Please select your currency:

- NZD
- AUD
- GBP
- USD
- EUR
- CAD
- Other - please specify

26. Where do you live? (Please select)