

Cook Islands Visitor Survey Results

April - June 2014

Prepared for Cook Islands Tourism Corporation

by

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www.nztri.org

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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 April to 30 June 2014. There were 1100 individual respondents to the survey - representing a total of 2075 adults and an additional 194 children (this equates to 7.03% of all visitors during the period – based on the latest 2013 visitor arrival data for the January-March period from the Cook Islands Statistics Office).

The survey results for this quarter are generally similar to the survey results of the 2012-2013 annual average. The consistency in the responses is an indication of the robustness of the dataset. Visitor spend prior to arrival in the Cook Islands (\$1,879) has decreased slightly from the 2012-2013 annual average (\$2,023 per person), and spend on the island (per person per day) is consistent with 2012-2013 average (\$115). The majority (61%) of visitors surveyed come from New Zealand, 21% come from Australia. Visitors are well educated (68% of visitors have some form of tertiary education) and have a higher than average annual NZ household income (46% earn over NZ\$100,000 per year). Over half (47%) of the visitors travel with just one companion. Solo travellers are relatively rare (7%).

Nearly two-thirds of the visitors surveyed (63.6%) are on their first visit to the Cook Islands, a further 25% have visited once or twice before. The main purpose of visit is holiday-making (72%). The average length of stay in the Cook Islands is 8.2 nights. The majority of the visitors (95%) stay either one or two weeks. Most (98%) of the visitors surveyed visit Rarotonga; 22% visit Aitutaki.

While in the Cook Islands, the total local spend per visitor per day is \$115, and the average local spend per visitor during the whole trip is \$947. If the pre-paid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,699 to the Cook Islands economy (or approximately \$207 per day). The 'in-country' spend is consistent with spend in the same period for the previous year (\$113 for April-June 2012).

Visitor satisfaction with activities and services is high. Water-based activities are characterised by the strongest participation levels while cultural activities are characterised by the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are the beautiful natural environment, the friendly local people, the peacefulness and relaxing atmosphere of the islands, and activities, attractions, entertainment and events. Smaller numbers of visitors mentioned the quality and availability of food and beverage, the high level of service and the un-commercialised nature of the islands. The least appealing elements of the Cook Islands experience are considered to be the quality and cost of the public services and facilities, the numerous stray dogs and the poor quality and value for money of food and beverage.

Overall satisfaction on the part of tourists is very high: 93% of those surveyed want to return to the Cook Islands and 98% would recommend the Cook Islands to friends or family. The overall satisfaction is very consistent with the previous year.

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Introduction

The Cook Islands government, local businesses and communities 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 during 2012-2013 on a quarterly basis, and continues through 2013 to 2014.

This report presents the results from the April to June 2014 period. Over this three month period, 4213 visitors were contacted by email to take part in the survey, and 1100 responses were received: a conversion rate of 26.1%. These responses cover a total of 2075 adults and 194 children. The conversion rate for this period is lower than for the 2012-2013 annual average (33%), but higher than the Jan-Mar 2014 quarter (23.6%).

The data presented include detailed information on:

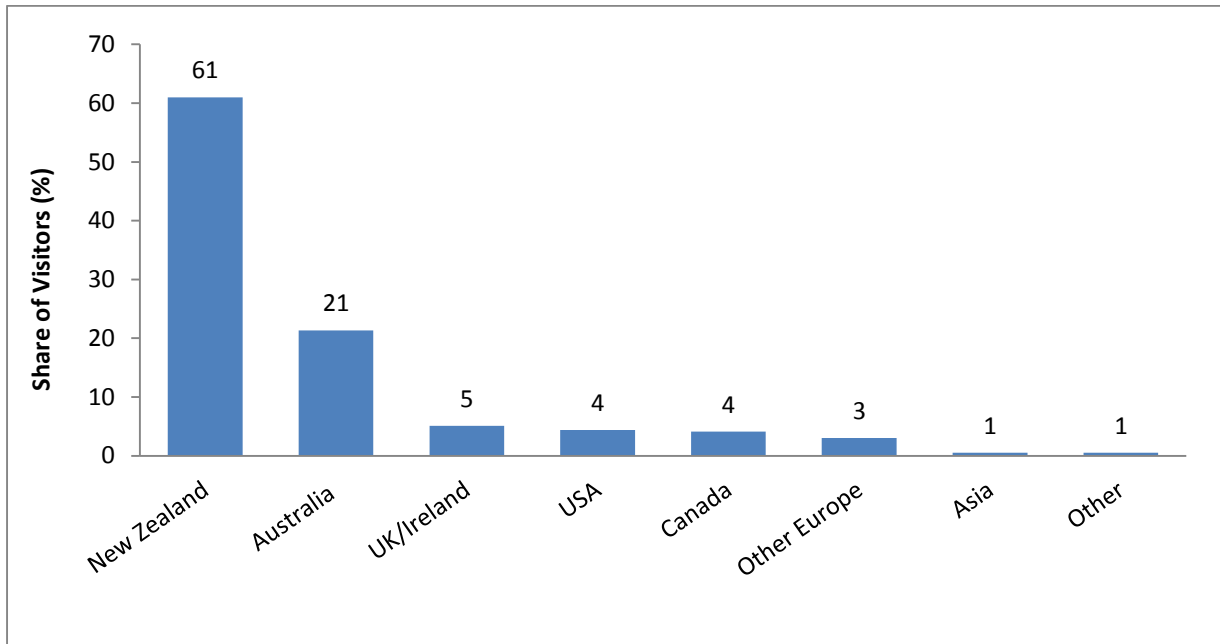
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook 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 2012-2013 annual averages these elements are highlighted. Comparisons across the four quarters will be provided in the annual report for this series.

Visitor Characteristics

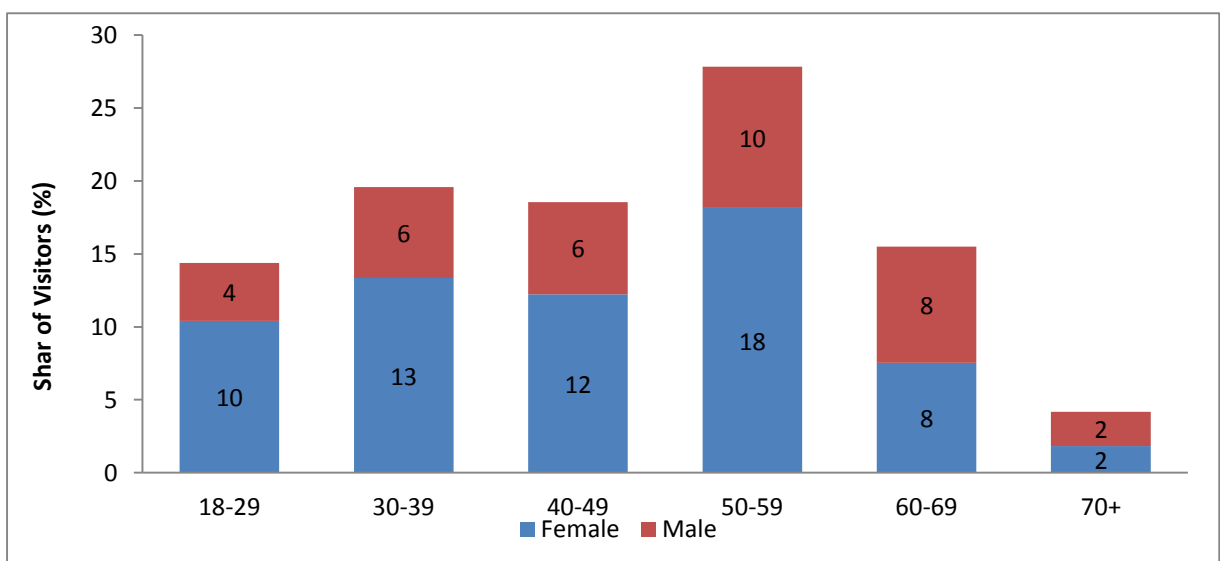
The majority (61%) of the visitors surveyed come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 21% of respondents. USA, Canada, Europe, Great Britain, and Asia represent the other key source markets.

Figure 1: Country of Origin (n=1007)



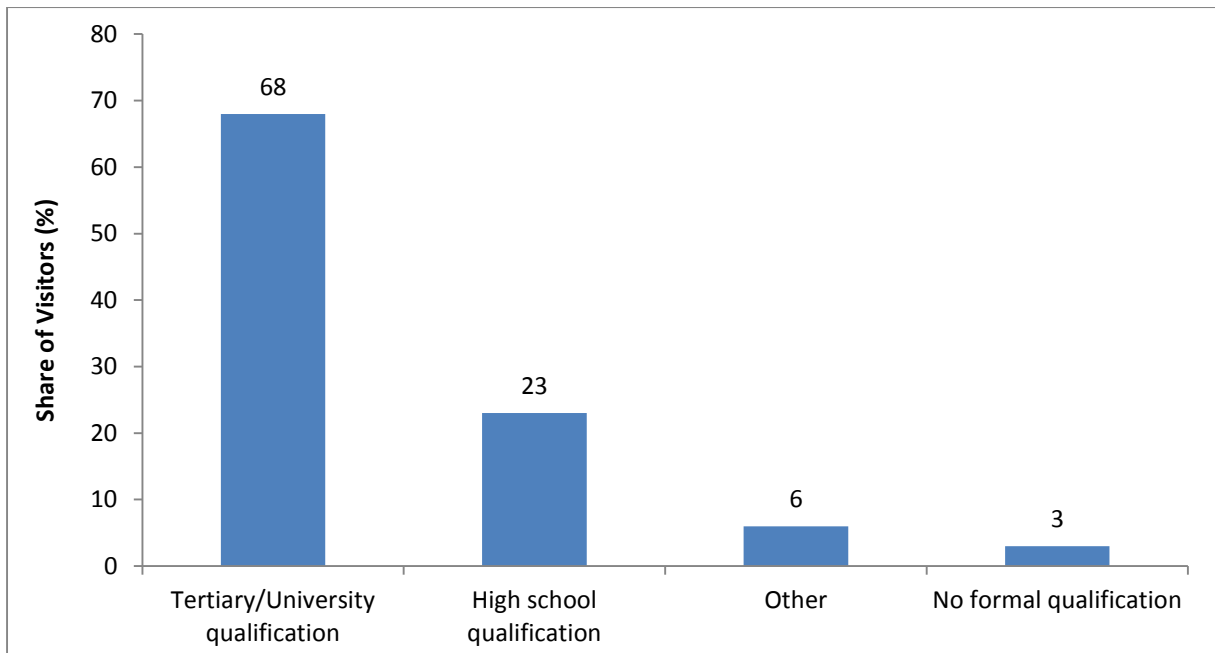
More women (63.5%) than men (36.5%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented age group, followed by the 60 to 69, 30 to 39, and 40 to 49 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=981)



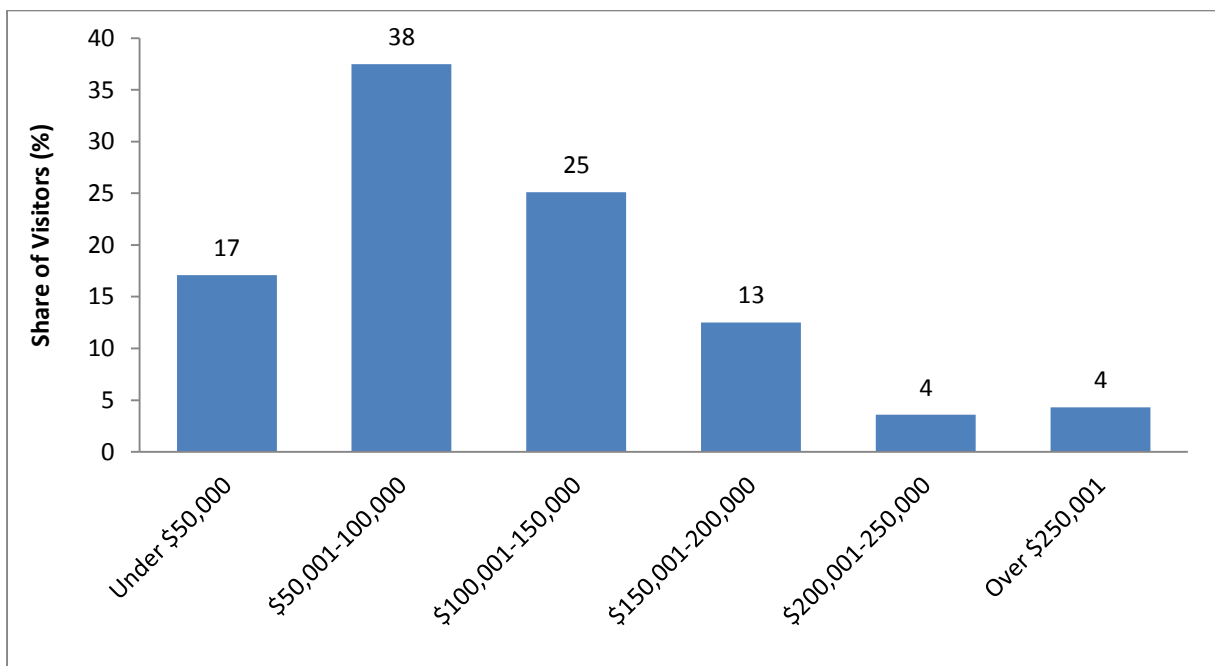
Visitors are well educated. More than two-thirds (68%) of the visitors surveyed had some form of tertiary qualification and a further 23% completed education at high school (Figure 3).

Figure 3: Highest Qualification (n=986)



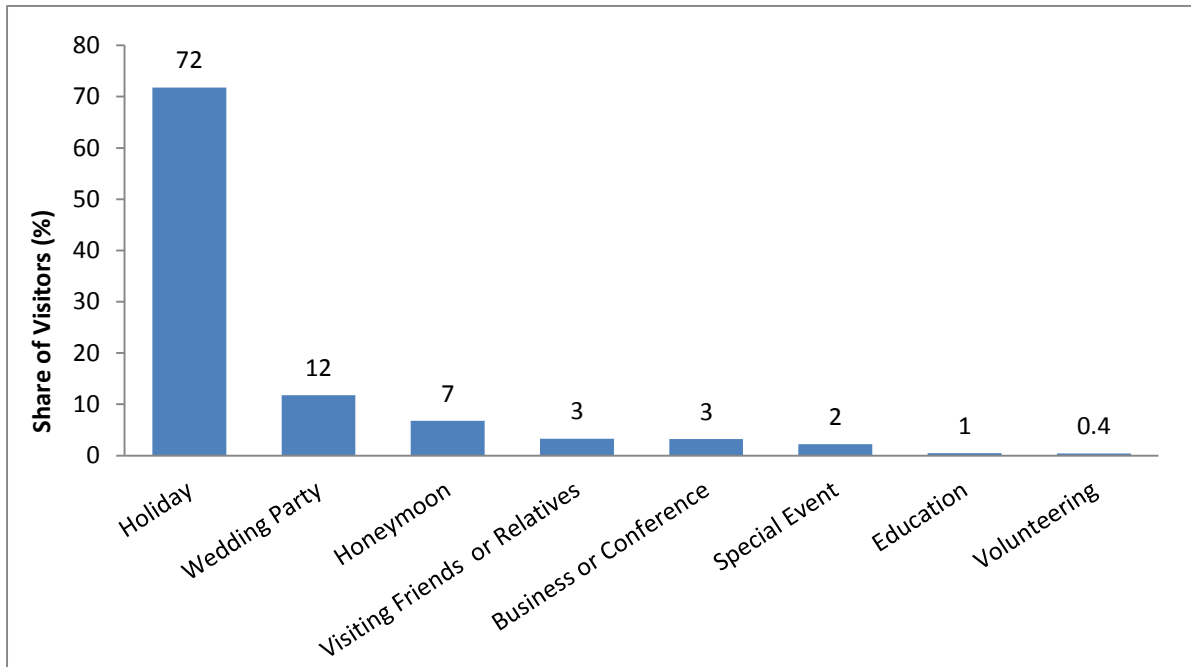
A significant group of visitors (38%) have an annual household income of between NZ\$50,001 and NZ\$100,000. One fourth (25%) earn between NZ\$100,001 and NZ\$150,000. A further 13% respondents have a household income of over NZ\$150,000 per year (Figure 4). The latest national statistics show a mean New Zealand household income of NZ\$85,588.

Figure 4: Annual Household Income in NZD (n=843)



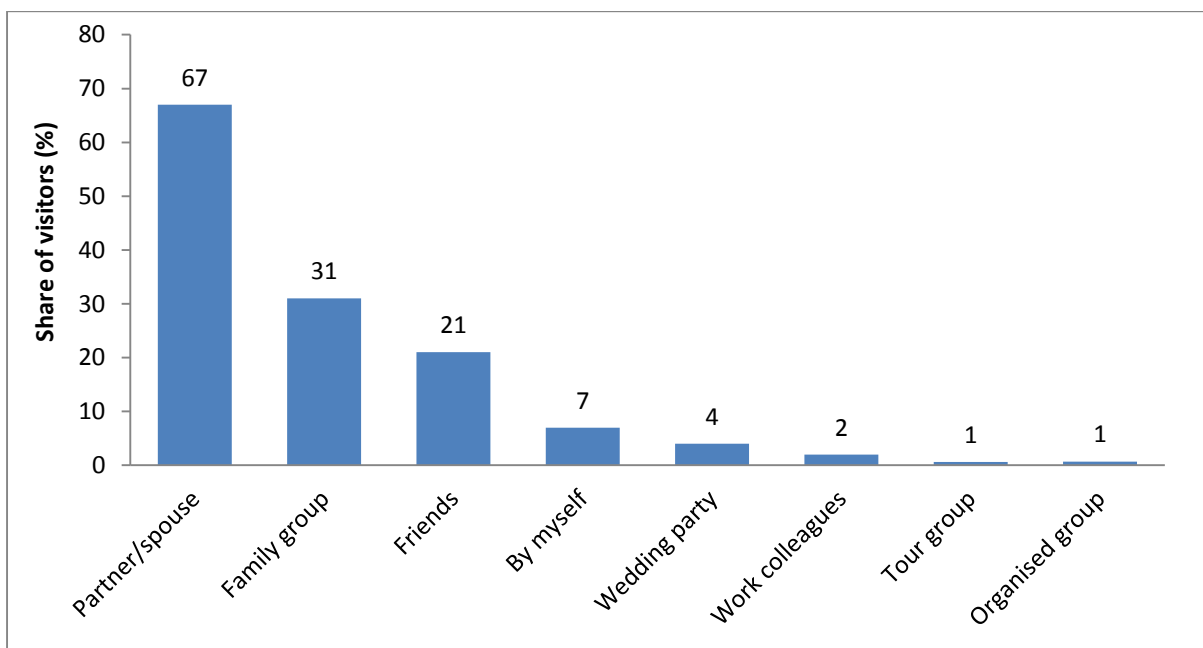
Three-quarters of visitors surveyed from January to March 2014 come to the Cook Islands for a holiday (72%), with the second major purpose of visit being to attend a wedding (12%). Seven percent came for a honeymoon, and 3% respondents visited friends/relatives or came for business/conference travel. Just 2% of survey respondents came for a special event (Figure 5).

Figure 5: Main Purpose of Visit (n=1100)



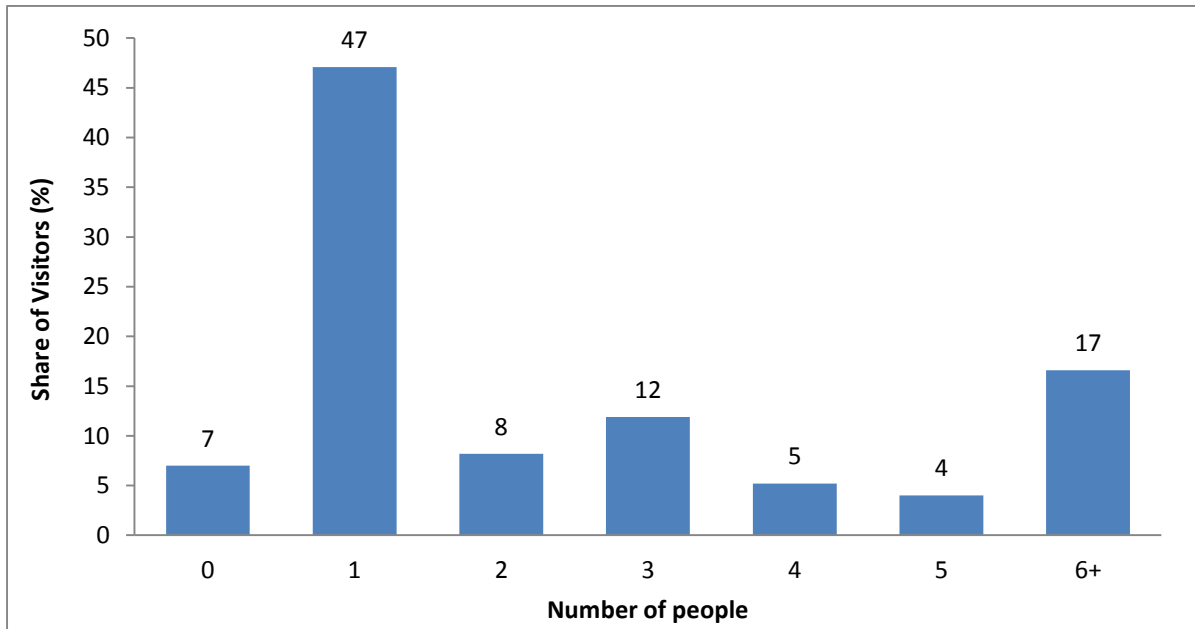
Just under two thirds (67%) of the visitors surveyed travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (31%) or friends (21%). Those travelling alone, with a wedding party, with colleagues, or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with whom? (n=1098)



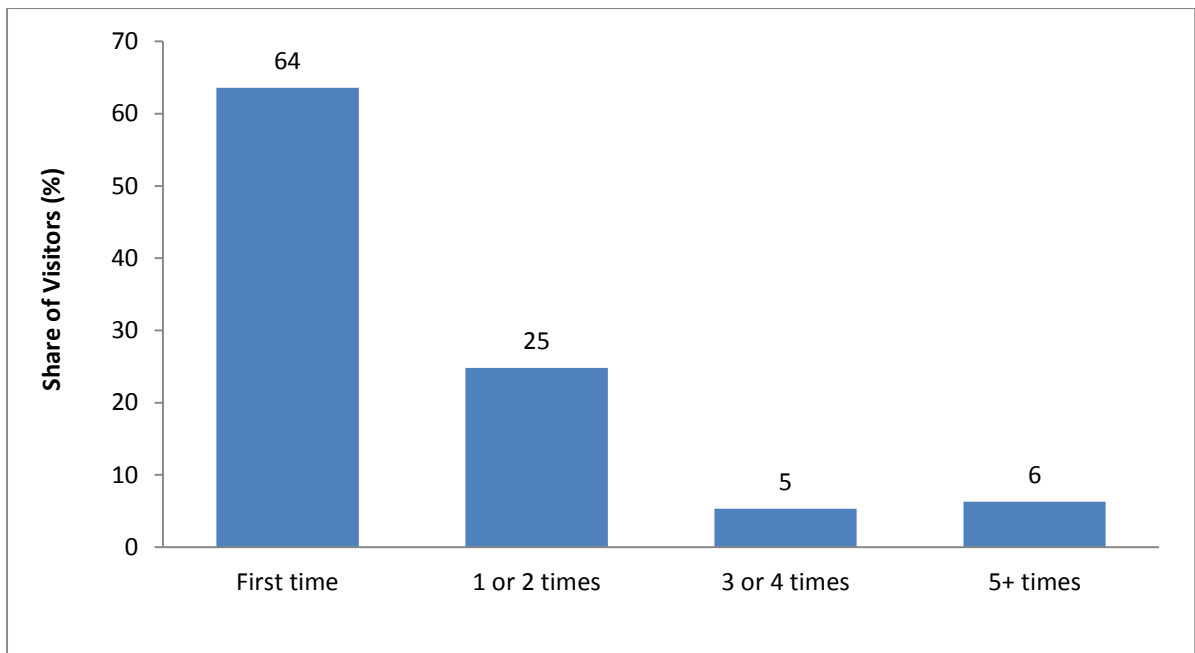
Nearly half of the visitors (47%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=1084)



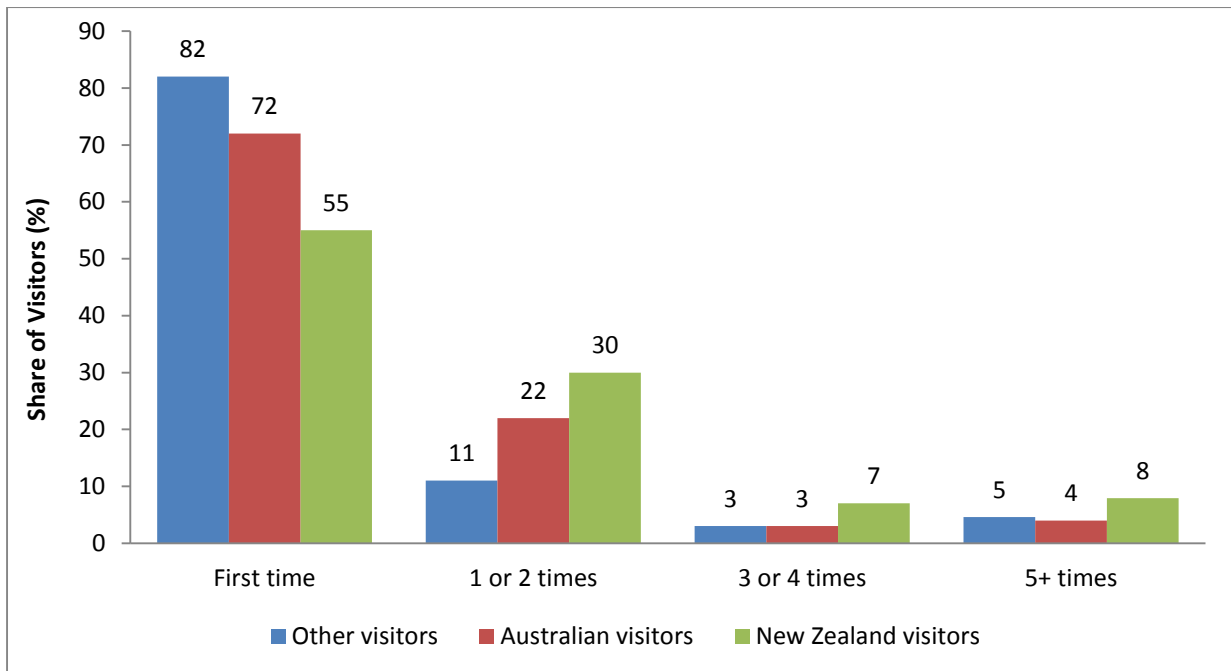
Most visitors (64%) are on their first visit to the Cook Islands. A further 25% have been to the Cook Islands once or twice before. A smaller group (11%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=985)



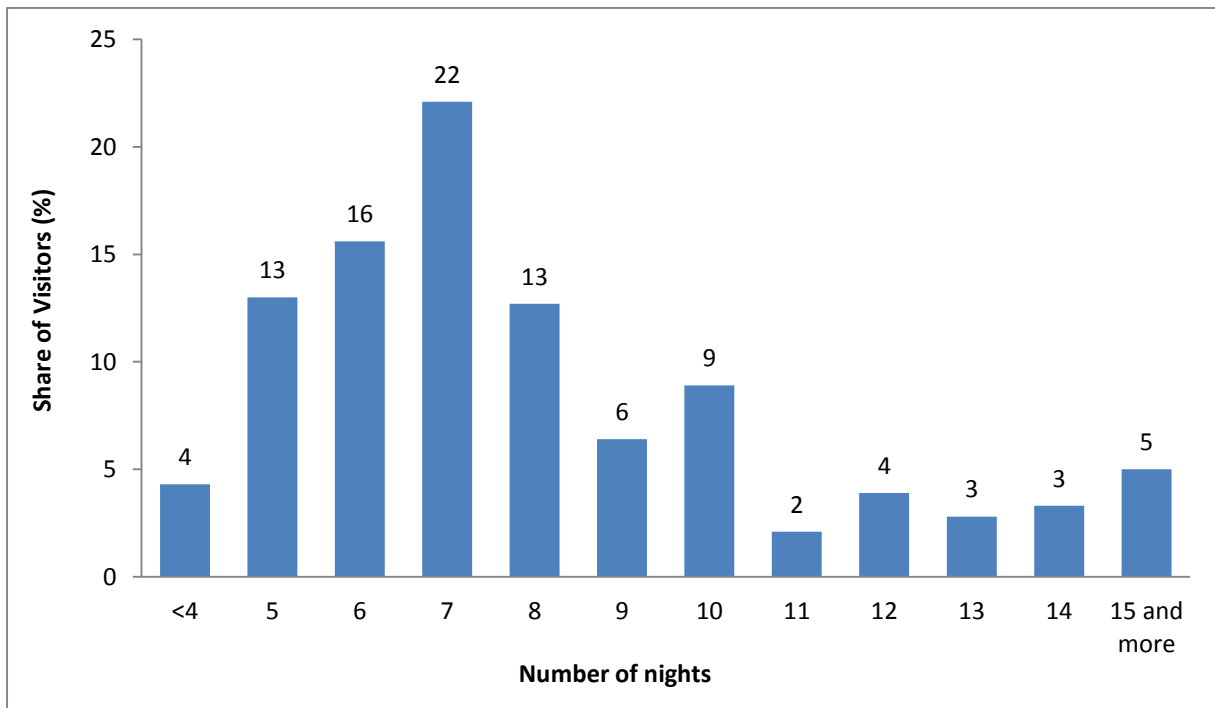
New Zealanders are more likely to be repeat visitors than those from other source markets (Figure 9). 30% New Zealanders have visited once or twice before compared to only 22% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=985)



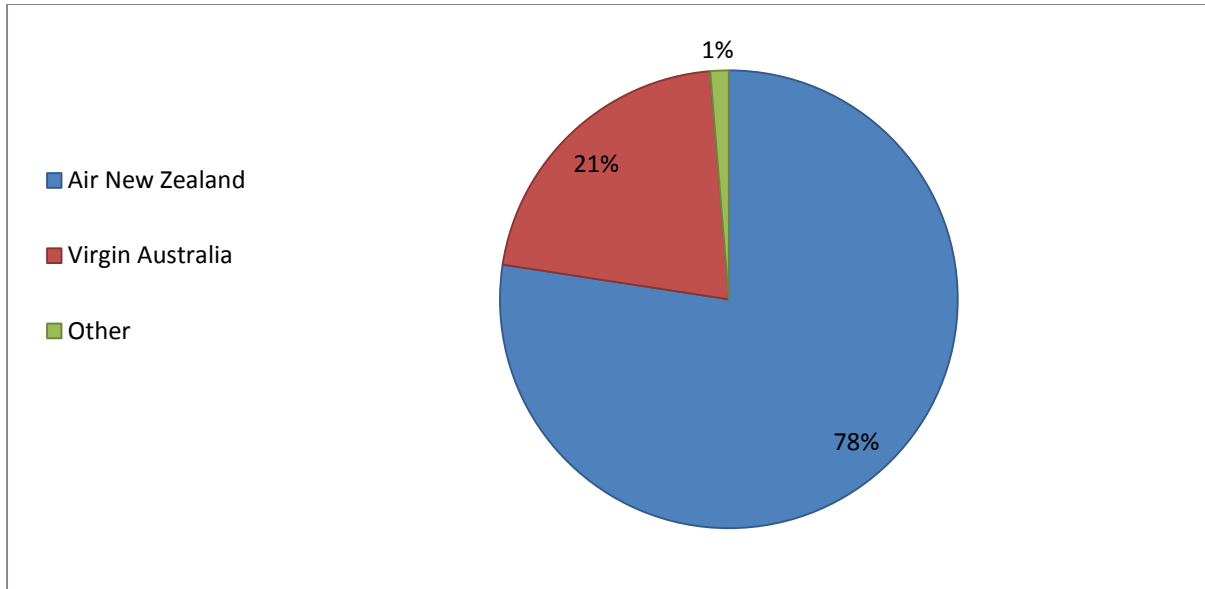
The average length of stay in the Cook Islands is 8.2 nights with 83% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=1083)



Most visitors (78%) travel to/from the Cook Islands with Air New Zealand, a further 21% fly with Virgin Australia (Figure 11). Most passengers on those airlines fly out of Auckland or transit through Auckland. Less than 1% of visitors travel with Air Tahiti Nui, or private vessel.

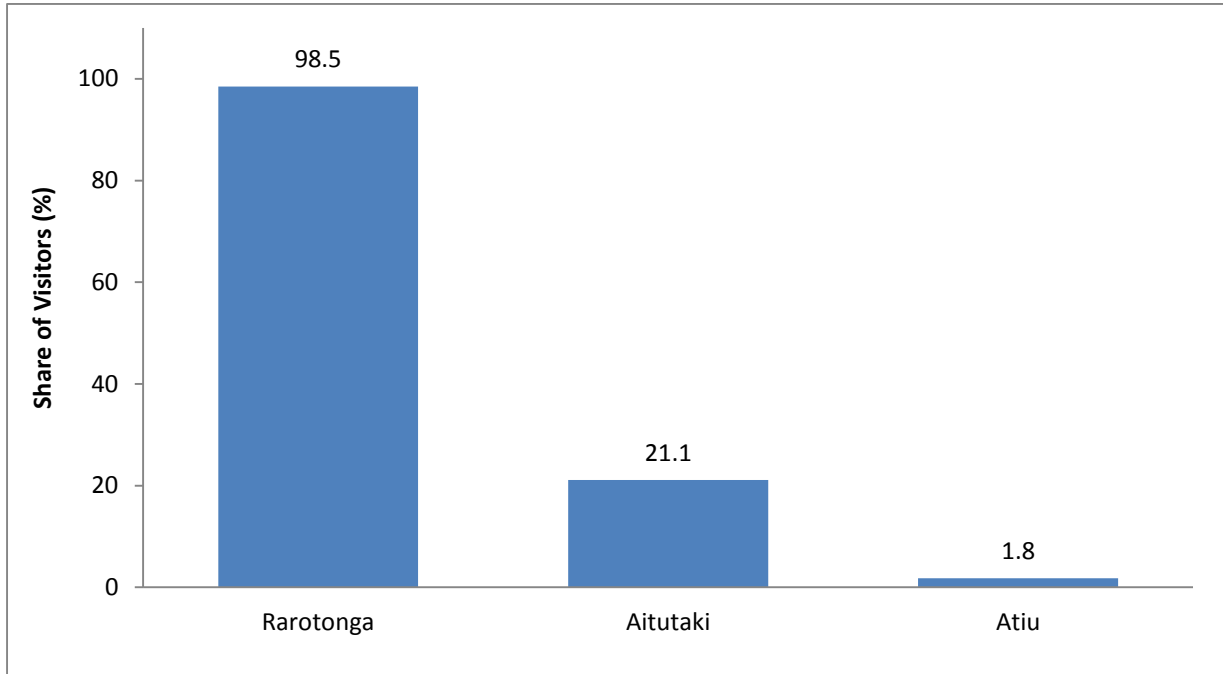
Figure 11: Airline used (n=1091)



For 87% of visitors, the Cook Islands represent the only destination on their trip. For 13% of visitors the Cook Islands is part of a larger journey such as an around-the-world trip. When this group of visitors were asked about other destinations that were including on their journey the top destination mentioned was New Zealand (67%), second was Australia (mentioned by 41% of respondents). Just over a quarter of visitors (26%) stated that USA was part of their larger trip and 24% mentioned a destination in Asia. Other destinations mentioned by respondents included other Pacific Islands (16%), Europe (5%), Canada (2%) and South America (1%).

The majority (98.5%) of visitors to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (21%) (Figure 12). The other islands were not mentioned often by the survey respondents.

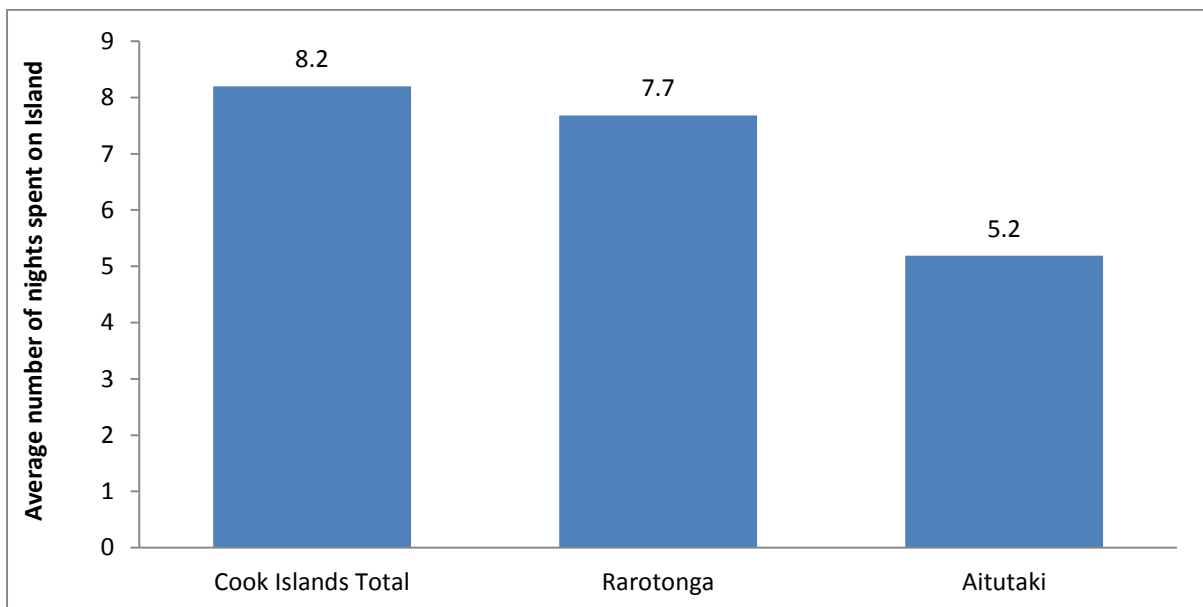
Figure 12: Visited Islands (n=1097)



Note: Respondents could visit more than one island, so total does not add up to 100%.

The average length of stay on Rarotonga is 7.7 nights (Figure 13). For the visitors that went to Aitutaki, the average number of nights spent on the island is 5.2. These figures are consistent with the annual average for 2012-2013 staying in Rarotonga (7.8 nights), but slightly lower than the annual average for 2012-2013 staying in Aitutaki (5.5 nights) (note the sample for Atiu was too small to include an average figure for this quarter).

Figure 13: Average length of stay in the Cook Islands (n=1094)

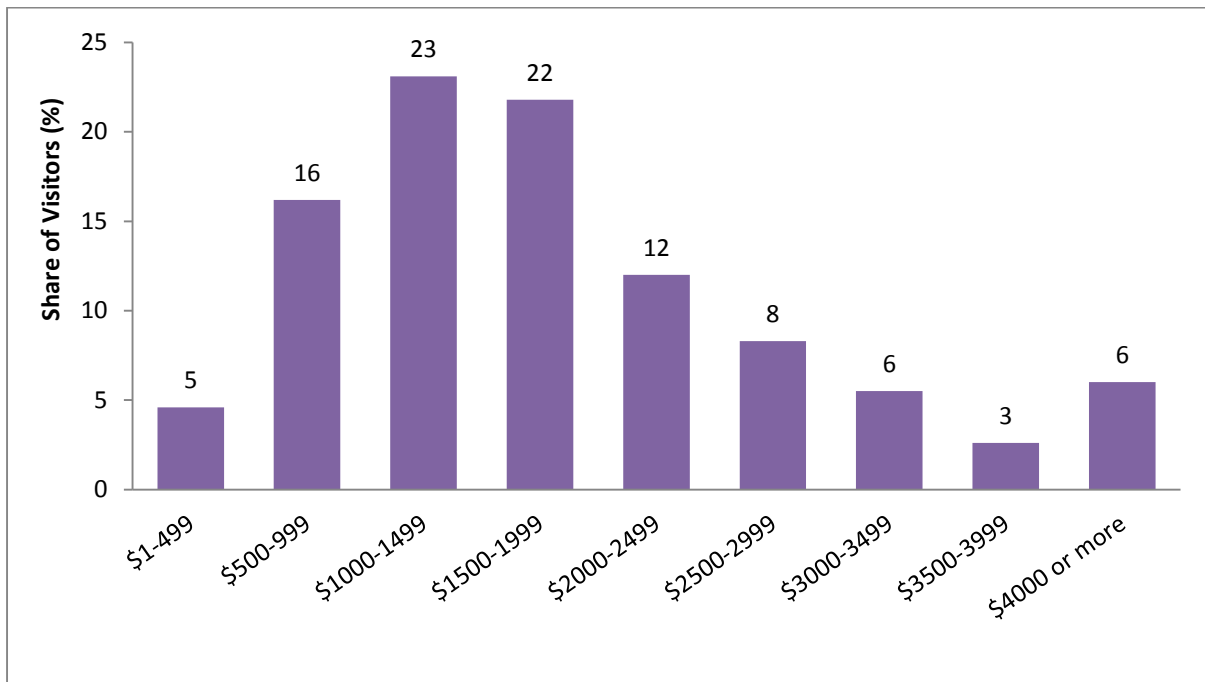


Visitor Expenditure

The survey asked a range of questions about visitor expenditure, both prior to arrival and while in the country. All the figures below are based on respondent estimates of their own spending and any others they spent money on (e.g. spouse, children). The following pre-paid expenditure section is based on the number of adults and children that respondents included in their cost estimates: 2216 people comprising 2041 adults and 175 children.

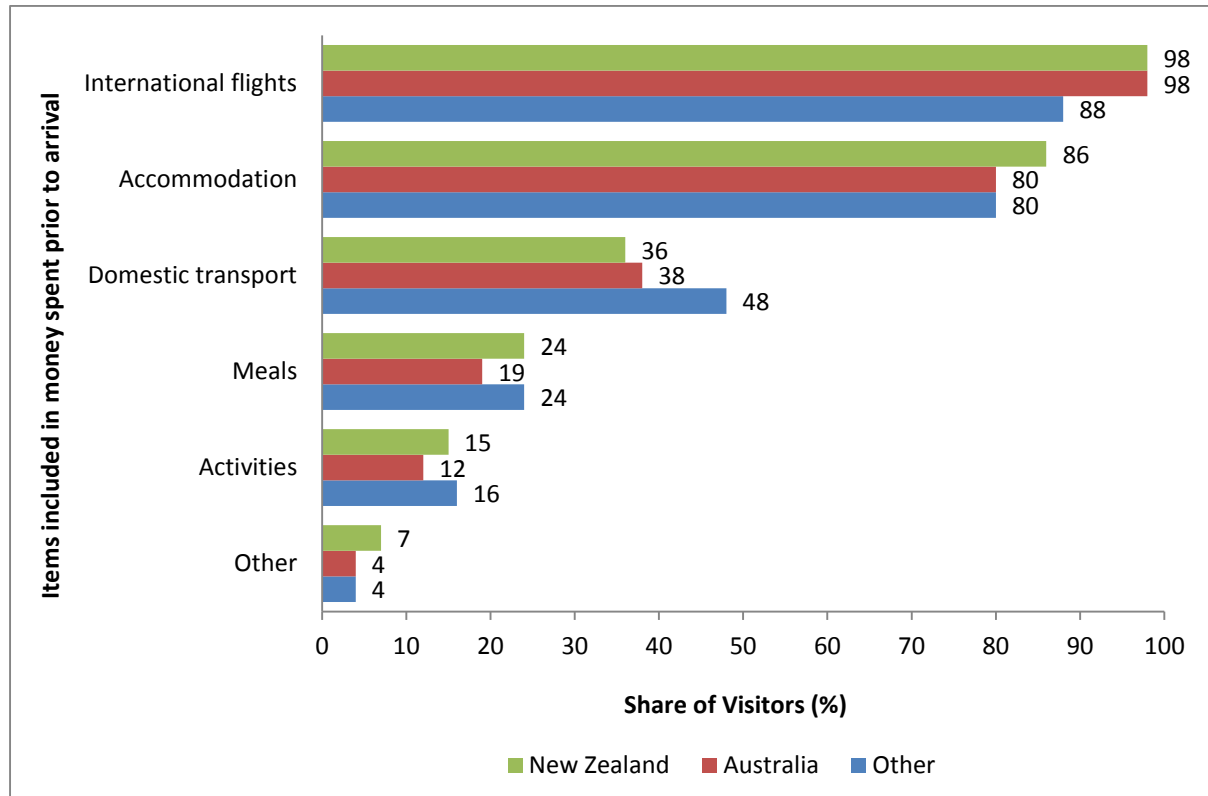
On average, visitors to the Cook Islands spend NZ\$1,879 per person prior to arrival. Most (57%) of the visitors spend between \$1000 and \$2500 dollars. These figures is slightly lower than the data from the previous year (average spend of NZ\$2,012 for 2012-2013) (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=901)



Besides international flights and domestic transport, spending prior to arrival usually includes accommodation: in 86% of the cases for New Zealand, 80% for Australian visitors, and for 80% of visitors from other countries (Figure 15). Meals and activities are less likely to be included in pre-paid expenses.

Figure 15: Items included in money spent prior to arrival (n=902)



It is difficult to estimate accurately 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 pre-paid spend is allocated to airfares, and that 80% of the remaining 50% of the pre-paid spend flows back to local operators. In total this means that for every pre-paid dollar, 40 cents flows to the Cook Islands. We assess that the pre-paid spend figure per day, excluding flights, is \$92 and for the entire visit is \$752.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$115 (Table 1). This figure is the same as the overall spend figure for 2012-2013 (\$115), but is higher than previous quarter (\$108 for January-March 2014). Most money spent locally is on restaurants, cafes and bars (30%), accommodation (26%), shopping (13%), and activities (8%). These per person expenditure figures are based on 906 survey responses covering a total of 2269 people (2075 adults and 194 children).

By multiplying daily spend by the average stay (8.2 nights) it is clear that each visitor spends on average \$947 during their time in the Cook Islands. The total figure of what is spent locally and what flows back to the Cook Islands from pre-paid expenses is \$207 per visitor per day (\$115 + \$92), or \$1,699 (\$947 + \$752) per personal visit.

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

Expenditure Items	Overall n=906	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	35	30
Accommodation	30	26
Shopping	15	13
Activities	9	8
Groceries	8	7
Vehicle rental	8	7
Domestic flights	4	3
Cruising	2	2
Other	2	2
Petrol	2	2
Public transportation	1	1
Total expenditure per person per day	\$115	100%

Table 2 provides an overview of the in-country expenditure by visitor country of origin. Australians and Europeans spend more than other countries. New Zealanders spend the least.

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

Expenditure Items	n=179	n=452	n=1473	n=103
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	35	41	33	30
Accommodation	40	33	26	48
Shopping	16	18	14	12
Activities	11	11	8	6
Vehicle rental	7	7	8	6
Groceries	10	9	7	11
Other	1	2	3	2
Domestic flights	7	5	2	10
Cruising	1	4	2	3
Petrol	2	2	2	2
Public transportation	1	1	1	1
Total spend (NZ\$)	\$130	\$133	\$106	\$131

Average Australian spend per person for this quarter (\$133) was slightly lower compared to the 2012-2013 average of \$137. European visitor spend at \$131 per person per day was up from the average of 2012-2013 of \$118. USA/Canada spend \$130 for this period it was slightly lower than the 2012-2013 average of \$139. New Zealanders also spent more in the previous year (average of \$120 for 2012-2013) – compared to \$106 per visitor per day for the April to June 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). Over two thirds (71%) of the visitors surveyed ranked their experience as 'very satisfied' (up from the 67% 'very satisfied' in the annual average for 2012-2013). 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=1011)

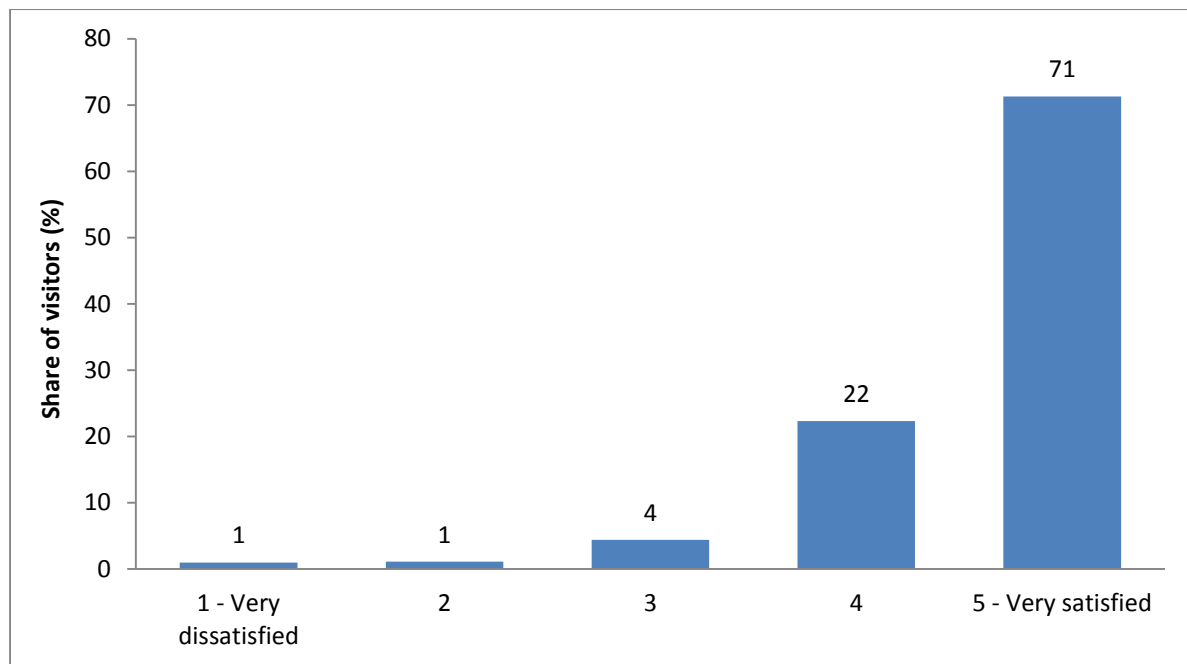


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (85%) visit a local market, and 65% 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 4.7) followed by water-based activities (4.5), land-based activities (4.5) and shopping (4.3). It should be noted that some activities e.g. kitesurfing, bonefishing, ocean cruise, whale watching are characterised by relatively low levels of participation.

Figure 17: Degree of participation in activities (n range=5-1072)

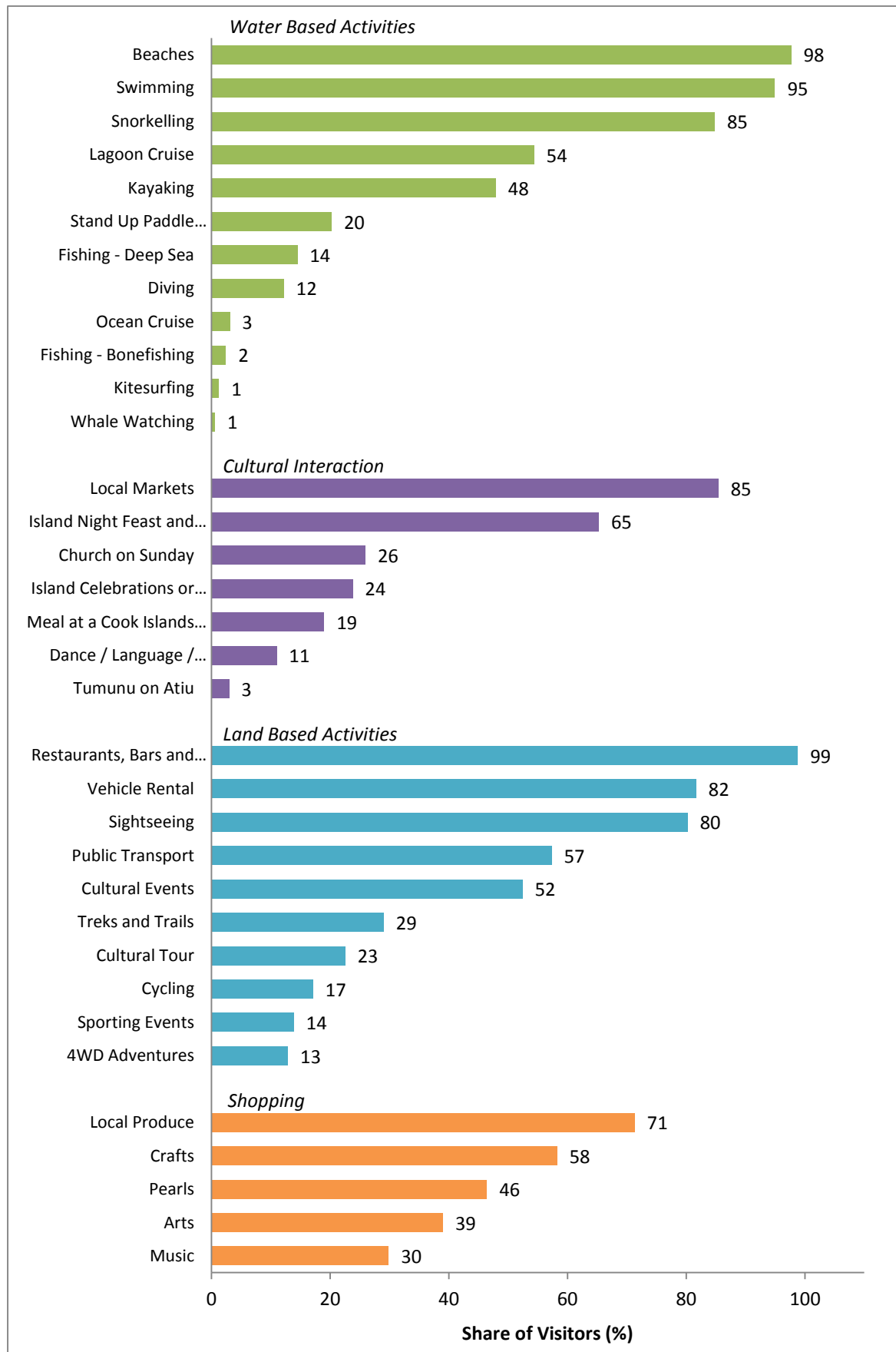
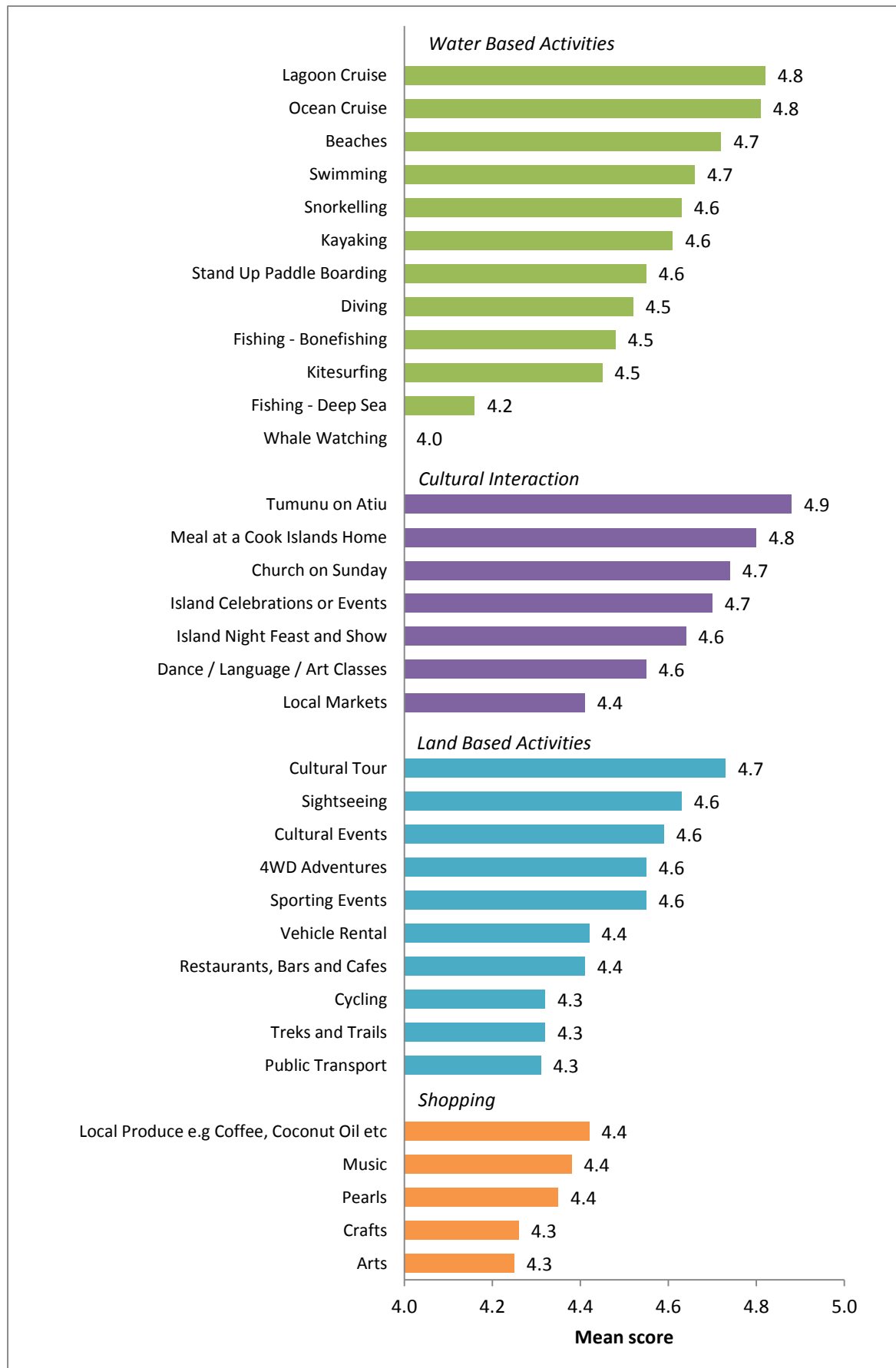
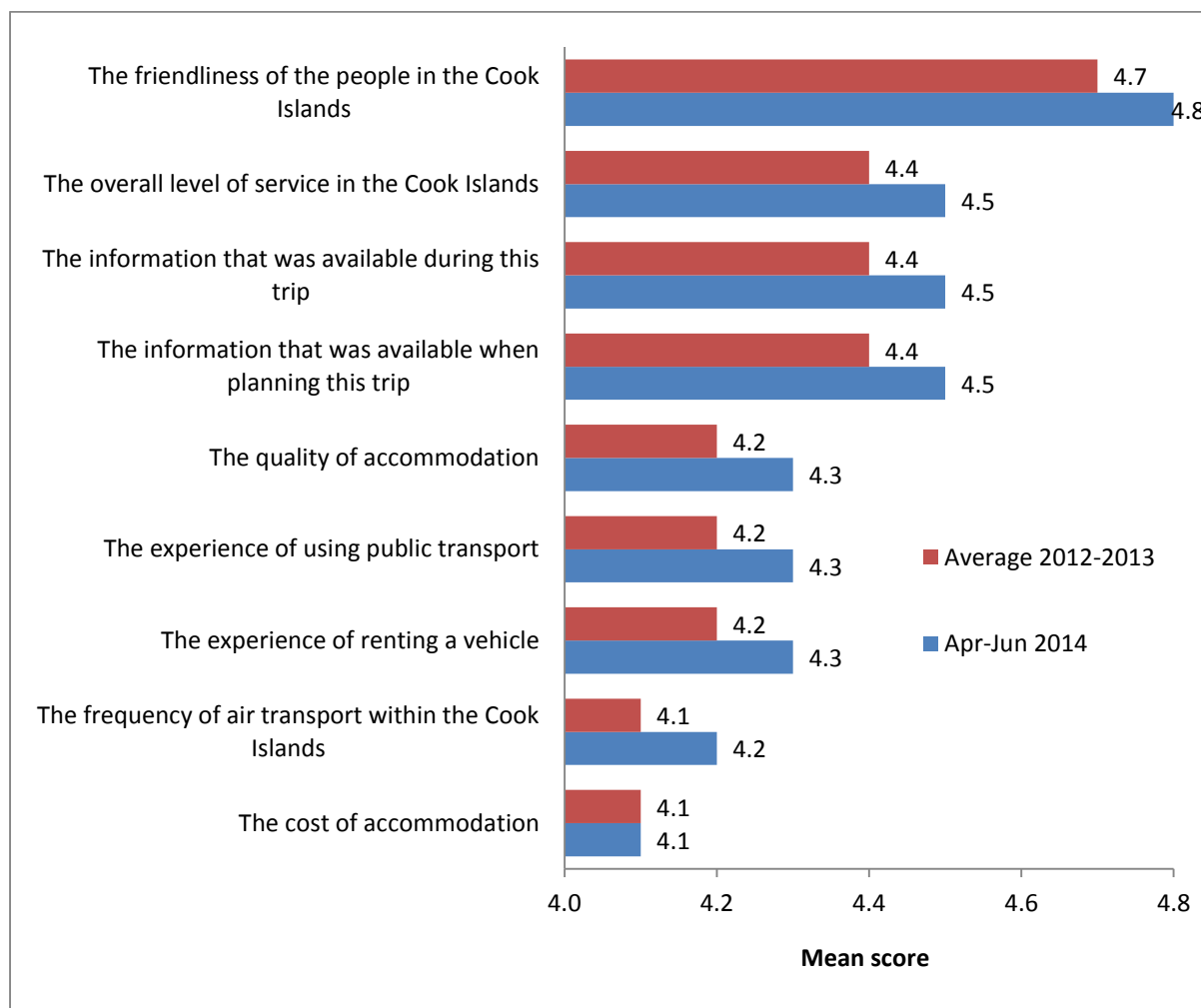


Figure 18: Degree of satisfaction in activities (mean score out of 5)



Visitors were asked to rate their level of satisfaction with nine different statements relating to their most recent visit to the Cook Islands (Figure 19). Responses from the period April to June 2014 are compared to the average for 2012-2013 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 local air transport and the cost of accommodation. In no cases though do scores fall below 4 out of 5. There is a slight but noticeable trend towards a higher level of satisfaction across most items for the current quarter compared to the average for 2012-2013.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5) (n=1096)



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?” (Table 3). The most appealing elements of the Cook Islands experience are the beautiful natural environment, the friendly local people, the peacefulness and relaxing atmosphere of the islands, and activities, attractions, entertainment and events. Smaller numbers of visitors mentioned the quality and availability of food and beverage, the high level of service and the un-commercialised nature of the islands. These figures compare well to the annual average for 2012-2013 with a similar proportion of respondents rating the top three most appealing aspects as the ‘environment’ (53%), ‘local people’ (40%) and the ‘atmosphere’ (30%).

Table 3: Most appealing aspects of the Cook Islands (n=1032)

Themes	Share of respondents (%)
Environment	44%
Local people	43%
Atmosphere	28%
Activities, attractions, entertainment and events	25%
Food and beverage	9%
Un-commercialised	5%
Overall good experience	4%
Accommodation	4%
Level of service	3%
Convenience of the Cook Islands as a destination	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%.

Environment

Nearly half (44%) of the respondents considered the environment to be the most appealing aspect of their Cook Islands experience. Visitors used words such as ‘beautiful’, ‘stunning’, ‘tropical’, ‘clean’ ‘spectacular’ and ‘cared for’ to describe the environment. Most comments here focused on the beauty and the cleanliness of the safe beaches and lagoons, the warm climate, the clean water and the beauty of the islands in general. The environment still remains one the most appreciated factors by Cook Island visitors, it should be noted that the comparable figure for 2012-13 was 47%.

Comments included:

“The most attractive and appealing thing without a doubt has to be the cleanliness of the island! From landing at the airport to shuttle to resort to scooter rides around the island and everywhere in between! The island’s beauty is amplified through its cleanliness!”

“The island was beautiful. It is the only place in the world that I have been to where being at the place far exceeds the photos I had seen previously.”

“Good climate and amazing natural resources, plants, animals... It is the occidental idea of paradise.”

"The most beautiful lagoons I have seen. Very raw and organic surrounding, please do not change it."

Local people

A large number of respondents (43%) noted that the most appealing part of their visit was the interaction with the local people in the Cook Islands. There was emphasis placed in the comments on the friendliness and welcoming nature of the local people, as well as their fascinating lifestyle and culture. Key words that dominated the responses included 'friendly', 'happy', 'welcoming', 'helpful', 'culture' 'respectful' and 'generosity'.

Comments included:

"The people of the island were just amazing, polite and so respectful."

"The friendliness and genuine hospitality of the Cook Islands people."

"The PEOPLE ... Kind Generous Friendly."

"I loved how friendly, gracious and welcoming everyone on the island was. We immediately felt like we were part of an extended family."

"The acknowledgement of elder people by the younger folk of the island. I'm in my 75th year, and was totally blown away by the acknowledgement and respect I received where ever I went. My comfort was taken in to account at all times."

"Friendly, welcoming locals, proud to speak of their culture, history and future."

Atmosphere

Over a quarter of survey respondents (28%) focused on the relaxed atmosphere of the Cook Islands. They considered the Cook Islands to be a very peaceful, safe and laid-back. Respondents used words such as 'laid back' 'relaxing', 'easy', 'safe', 'slow pace of life', 'peaceful', 'simplicity' and 'warmth' to describe the overall atmosphere. The notion of 'island time' was also frequently highlighted.

Comments included:

"The relaxed lifestyle! I just loved how relaxed and friendly everyone was. It really is an oasis on earth."

"The laid back lifestyle so relaxing and refreshing. Just a beautiful island, beautiful people and so much to see and do. Never boring there is something for everyone."

"The best place in the world for relaxation. Away from the rat race of the rest of the world."

"Being in a remote place far away from everyday life, quiet and peace."

Activities, attractions, entertainment and events

Activities and entertainment were mentioned by 25% (up from 18% in the 3rd Quarter) of respondents as the most appealing elements of their Cook Islands visit. Most comments in this category focus on water-based activities such as swimming, snorkelling and lagoon cruises. Land-based activities that respondents mentioned included the experience of travelling around the island by scooter, shopping, visiting the local churches, cultural tours and local markets. Comments included:

"We enjoyed the sun, sea and people especially on the cruise and the cultural show."

"Snorkelling was the best one. We went every day while we were staying."

"Puna's day trip the highlight, both from beauty but also his & his family's warmth & love & knowledge of the place & the food he supplied. Can't speak highly enough."

"The Deep Sea fishing was the reason I was in Rarotonga and it didn't disappoint."

"The activity we enjoyed the most was our visits to the churches on Aitutikai and Rarotonga. The singing was so moving. Enjoyed it very much and appreciated being made to feel so welcome."

"I really enjoyed the cultures tour and dancing with the buffet dinner, it was the best cultural tour I have even been on, I did a day trip to Aitutaki and it was money well spent it seemed like a lot of money but it was worth every penny it was the most amazing tour. The team was amazing and entertaining and knowledgeable best day ever."

"Riding scooters - Loved the freedom and the warmth."

"The variety of activities is perfect for all; from game fishing to lying around on the beach. The markets etc are fabulous."

Food and beverage

9% of the respondents mentioned 'food and beverage', adding that they found these to be fresh and of high quality - especially local, fresh produce. Many visitors commented on the great selection of good cafes and restaurants and the good choice of food available.

Comments included:

"EXCELLENT chefs! LOVED the fresh fish and fruit!"

"The selection of restaurants and bars - fantastic evening on the Wednesday night at the restaurant"

The standard of the food in the Restaurants was excellent and very generous / servings."

"Fish meals in the restaurants - outstanding."

“The high quality of the food especially on Aitutaki.”

Un-commercialised

Five percent of the respondents mentioned the Cook Islands as being a place that is not over-commercialised or over-crowded. Some visitors also emphasised the importance of preserving the destination from mass tourism development and keeping it the way it is. A number of repeat visitors positively noted that the Cook Islands are still the same and that nothing much has changed. Comments included:

“Our 2nd trip in 4 years and so pleased to see it had not changed much. We love how it is not very touristy. Native people working & running the businesses.”

“That you are still true to your roots! Hold onto them for as long as you can and don’t give in to the commercial world. You are perfect the way you are now!!”

“The islands are still not overdeveloped. It’s still tranquil and not ruined by big developments.”

“It is so lovely to visit a tourist destination that is not overly commercialised. Don’t change that, it is the reason so many people visit and love Rarotonga so much.”

“The lack of commercial (chain) retail and food outlets gave us a more personal, intimate experience.”

Overall good experience

Seven percent of respondents simply stated that their whole experience was a good one. Visitors expressed their positive experience with ‘loved everything’, and ‘the whole place’. Comments included:

“The whole place and people are wonderful we had a great time it was our second time back and we will come again!”

“The weather, the people, the country - love it all, Rarotonga is my favourite place in the world.”

“Literally everything on the island was attractive and appealing.”

“Everything was just beautiful!”

“It’s hard to pick just one thing. It is one of the best destinations we have experienced.”

“What a wonderful getaway- from beginning to end!”

Accommodation

Another 4% of respondents noted that the accommodation they stayed in was an appealing aspect of their visit. The key words used to relay the visitors’ experience were ‘fantastic’, ‘absolutely

beautiful' and 'amazing' referring to the quality of the offering, the setting and welcome from hosts. Comments included:

"Staying at the resort was the highlight of accommodation, well decorated with views of the beach."

"Our accommodations were fantastic as were all the staff."

"We stayed in a private villa and that was amazing."

"Best stay we had - the staff just great the location was paradise found and we would come back again and again."

Level of service

Three percent of visitors commented on the service they encountered while in the Cook Islands as being an appealing feature of their trip (down from 8% in the 3rd Quarter). Respondents had positive things to say about the local hospitality, especially mentioning the friendly staff they encountered at restaurants/bars/hotels. Visitors also emphasised the lack of pressure to buy which made them feel comfortable. Again some respondents made comments on some very entertaining local guides and bus drivers. Comments included:

"At the resort, the staff knew us all by first name, who we were with and what we were there for. They were so friendly and helpful it made the trip so enjoyable."

"Local bus driver "Mr Hopeless" taking us home after the markets on Saturday... his commentary was hilarious and informative and he was a highlight of our trip."

"Being met at the airport at 1am local time by friendly Islanders, being garlanded and taxied to the resort was kind of unexpected and special."

"Guides on our lagoon tour were fantastic helping with the kids in the water when snorkelling so we all had a great time."

"We LOVED the staff at our Resort! They were all nice and some EXCELLENT chefs!"

Convenience

The convenience of the Cook Islands as a destination was mentioned by a small proportion of respondents (3%). In particular, they referred to the ease of getting around the islands, the convenience of using the New Zealand dollar and the lack of language barrier. They also appreciated the reliable and convenient public transport system. Comments included:

"We do appreciate also smart, fast and efficient public bus system - not to be seen in other Pacific countries."

"Not having to worry about change of money/currency, no language barrier"

"You could rent a scooter and stop at beaches around the island. You didn't feel confined to your resort as per some island holidays."

“Convenience of everything. Found a huge improvement on the convenience of everything.”

“Being able to get around the island so easily by bus.”

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 20% visitors took the trouble to note that they found nothing was ‘unappealing’, that it was ‘all great’, or that the only unappealing aspect was that they ‘had to leave’. This group of visitors responded with comments such as: “I can't think of a single thing. I loved every second.”, and “Nothing unappealing - my visit was awesome...just like last time! If I could relocate there, I would do it in a heartbeat! “.

There were, however, a number of areas that did attract comments (Table 4).

Table 4: Least appealing aspects of the Cook Islands (n=940)

Themes	Share of respondents (%)
Public services and facilities	17%
Stray animals (dogs, roosters) and mosquitos	14%
Price of goods & services	11%
Accommodation	10%
Food & beverage	9%
Rubbish & natural environment care	9%
Poor weather	6%
Flight/airline-related issues	5%
Local people	4%
Attractions & activities	4%
Rental cars/scooters/bikes	3%
Safety & poverty	2%
Becoming too commercialised/touristy	1%

* 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 (17%) of survey respondents expressed their disappointment with public service, facilities and infrastructure in the Cook Islands. In particular complaints were made about the frequency of public transport, opening hours of shops and markets, lack of information of where to go, slow customer service, the condition of roads, footpaths and public toilets, run-down buildings, along with poor internet and cell phone services. Several respondents here also mentioned their frustration with having to obtain a Cook Island driver's licence. Comments included:

“Everything closed too early.”

"We had an hour wait for a bus one day and there were no taxis available, or so we were told by several people."

"The unevenness of the roads and the pot holes that could not be seen at night due to poor road lighting."

"The place is starting to look a little tired, a coat of paint on a few buildings and a tidy up would help a lot."

"I researched getting my Driver licence and all literature stated I needed ID and my current NZ licence. When I arrived at the Police Station counter, after queuing they told me I needed my passport... had to return to the hotel to get it... got back queued again only to be told "cash only"... yes there are signs saying you need your passport, which I noticed while queuing the second time, but none about cash. This experience was not OK and there were many in my position."

Stray animals and mosquitoes

The stray dogs, noisy roosters and mosquitoes continue to be an annoyance or a worry for 14% of respondents during their time spent in the islands. This figure is slightly higher than the last annual average (12%). Respondents used a variety of words to describe this theme including 'roaming', 'barking', 'Dengue fever'. Comments included:

"The mosquitos, the dogs that have not been cared for properly, need to neuter, spay your beach animals."

"Neglected dogs around the island, some with only 3 legs! One with a terrible skin disease (obviously, untreated which lay around the lodge most days. (Didn't belong to them)."

"The amount of stray dogs, way too many. At times my partner and I felt unsafe, twice we were caught in two packs fighting."

"Me and my sister both have got dengue fever from Rarotonga and it was very serious (mosquitos)."

"ROOSTERS! MINA BIRDS! Surely some eradication could be done on these?"

Food and beverage

A number of visitors (9%) commented on the cost, quality and availability of food and beverage in the Cook Islands. Respondents noted that food was 'expensive' and 'lack of fresh products'. They would like to see more fresh and local produce, and less westernised takeaway foods. Responses included all options such as restaurants, resort dining and shops. Comments included:

"We were self-caterers for most of the meals. It was very difficult to find food on Aitutaki, as the shelves were mostly bare except when the delivery ship arrived. On Rarotonga we did not discover the largest grocery store until the day we left. We were able to buy some locally grown produce on Aitutaki, however, we found that vegetables were difficult to find."

We would encourage more locally grown produce to supplement what is available in the stores."

"Not being able to buy some healthy fruit and vege options at the supermarket (I missed the market) quite hard to source healthy food snacks/fruit."

"Selections of foods, always white rice, bread/potato/the quality of foods in all the restaurant, charges so much in a small portion nothing special on the plates...the Park foods is much reasonable than anything in the island much healthy/tasty..."

"Cost of food. I have been to the Cook Islands 4 times in the last 10 years. The food costs have tripled during that time."

Rubbish & natural environment care

Other visitors (9%) mentioned waste management and the lack of care of the natural environment in the Cook Islands as unappealing factors. Rubbish on the beach, burning of rubbish and littering of the natural environment were often commented upon. The poor condition of the lagoons and beaches, erosion, polluted water, degrading coral reefs and threatened marine life, also concerned a small group of visitors. Comments included:

"A visit to Black Rock, we found the area very messy with litter everywhere, a shame that this happens in paradise."

"RUBBISH. Rubbish along the streets but above all rubbish along the beaches that are not just in front of a resort that takes care of cleaning up. It seems inhabitants don't care to place rubbish in the bins. May be some visitors too. But it must be said that NO BINS are available along the beaches. It would be very simple to stick poles every 500/750 meters along the beaches carrying simple metal cylindrical bins, where people could put the plastic bags, bottles, glass shards they encounter walking. I am sure tourists would be very helpful; we all stroll along the beaches and it would be a pleasure for us to help clean up. Environment care is IMPORTANT. You have such a treasure in your hands!"

"We were very concerned and affected by the constant outdoor burning every night around the island. I know the islands are small, and waste management is an issue, but having no escape from the smoke was a big problem for me as I have asthma."

"There seemed to be quite a lot more rubbish around than recent years and very few bins to put the rubbish in. Especially at bus stops."

Accommodation

Ten percent of visitors commented on the high cost and poor quality of accommodation. Visitors surveyed mentioned that the cost of accommodation is expensive for the value received, that some accommodation places are in need of an upgrade, as well as service quality. Comments included:

“we paid \$400/night for a beachfront room and the room was very small, absolutely filthy, outdated and they never changed the sheets etc. we have been to Rarotonga before but this time we brought our children and could not find quality beachfront accommodation for families, it is all for couples.”

“Very brown water coming out of every tap, not being able to drink the water (and no one tells you this when you arrive and they should). Our accommodation wasn't ready when we arrived, we had to wait outside for the owners to arrive, bring the keys and clean our room - we spent a lot of money on phone calls to get them there.”

“General moodiness and lack of enthusiasm from staff at our resort. Outrageously over-priced resort accommodation. We felt like we were an inconvenience to some staff, and that they didn't really want us there.”

“Some resorts are out dated and in need of attention.”

Local people

A number of visitors (4%) found that the local Cook Island people did not seem as friendly towards visitors as they used to be. However, this number is less than previous quarter (8%). Visitors surveyed commented on how customer service in general was poor, and the local people are not friendly to visitors – with the visitors getting the feeling that the local people are grumpy. Comments included:

“A lady selling jewellery/shells/sarongs at the markets took a 50% deposit (\$20NZ) from us when we ordered an engraved seashell as a honeymoon keepsake and said it would be delivered to our hotel in 2 days before we left the Island, she never showed up and we lost our money.”

“Since our last trip we have seen a dramatic difference in the cost of things and the people. They used to be so friendly and are now so greedy for money. The customer service is terrible and the locals are over charging on things when they shouldn't and don't tell you until you have to pay. We have to pay \$50 for a taxi from Trader Jacks to Sunrise Beach Bungalows...! That is ridiculous and I am disgusted that you would treat tourists this way, since you rely on tourists for income.”

“The comments of the locals who admitted they were just interested in making money from tourists.”

“I would say only 10% of the people were friendly.”

“The second issue was that we had our room broken into and \$750.00 stolen from my wallet, and my shorts pocket. We had left our sliding door unlocked as we were just in front of our unit on the beach, but somehow the person managed to get in undetected. Although we notified management right away and they called police, who came and did fingerprints

while we were out at dinner, we were told they'd come the next afternoon to take a statement. We spent the next afternoon in our unit waiting, and management called twice to see where they were, we kept being told they'd be there soon. We wasted a whole afternoon and no one came. Finally the next day someone came and took our statement. I identified someone from their book, and I was told they'd try to arrange a lineup for me to attend before we left the next day for Aitutikai, but that didn't happen. They were supposed to give us a police statement for our insurance company and leave it at the villas, but that didn't happen. The manager there called the police who dropped off the letter just before we flew out, but no progress report on our case."

Other

A range of other unappealing aspects were mentioned by visitors, including: price of goods and services (high cost, poor value), attractions and activities (disappointing), poor weather (humid, windy), safety and poverty (theft, dangerous, hygiene), flight/airline-related issues (influent, flight arrival and departure times), becoming too commercialised/touristy (over-developed, arrogant tourists), and rental cars, scooters and bikes (quality, cost and service).

Comments included:

"Prices of everything. Even local produce stalls, restaurants, crafts. Given the hourly rate paid to people for labour content, the prices were far too high. I understand that most things have to be imported but not local craft or produce."

"The new owner of the fishing charter took husband on charter in bad sea, had more people on board than was told was going to be there, in a time of the year when there was no fish, so in fact was just taking the money for the hell of it."

"The company that I rented my motorbike have charged an amount to my credit card since I left and I have not been able to get in contact with them to sort it out."

"Low usage of helmets/seatbelts put us off renting a vehicle (don't want to get hurt, but also we don't want to risk hurting someone else)."

"Cost increases compared to other countries, especially Aitutaki. We would love to go back there as that is where we had our honeymoon, but the accommodation cost is becoming ridiculous when you compare to other countries for similar level of accommodation."

"Having to leave at an odd hour of the night with children i.e. 0230 in the morning and then the plane was delayed an hour and the resort didn't have or weren't given that info."

"The intense tourist accommodation building that was going up along Muri Beach, the resultant lack of easy access to the beach and possible pollution of Muri lagoon."

"Our accommodation was a little tired. The staff were in "Island Time", when we slowed down to relax, this wasn't a problem for us. Fire alarm went off on our 1st night, was a lack of communication from staff. Again they were very relaxed about it all. Said not to worry, it always happens. This wasn't very reassuring."

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 (42%) of respondents said 'yes'. Suggestions mentioned by respondents focussed on entertainment, activities and transport (17%), accommodation (16%), visitors regretting they did not stay longer (15%), public services and infrastructure (12%), environment/safety/animal care (11%), quality and cost of food and beverages (9%), weather (7%), flight schedules in and out of Cook Islands (7%), friendliness of locals and service levels (6%). Comments on these themes included:

"Providing tourists with additional information, more detailed/accurate maps, informing them about details of the tours which the tourists are buying."

"More frequent bus service around the island. Once Every hour makes it difficult if you just miss it... We ended up hitchhiking a lot which probably wasn't the safest way to travel."

"I think that some of the resorts room rates are overpriced."

"Our accommodation said it had wifi but it didn't work and we had to go to hotspots around the island. Made it difficult to keep up with business and news from home. We were told by telecom that internet costs from Cooks would be horrendous so that's why we choose a property that offered wifi."

"More promptness and follow through with the police on theft issues, which we saw after our loss, is a problem on Rarotonga as several other people were robbed during our stay."

"There was a general lack of rubbish tins around. Maybe if you put 200-300 bright orange bins around the island and picked them up regularly there would be less litter."

"Access to a wider range of healthy food for tourists and for locals, a greater awareness of healthy eating on the island would be beneficial for locals and for tourists during their stay. More access to a wider range of vegetables for everyone."

"Perhaps staff at any business could undergo training e.g. in NZ we had the Kiwihost course years ago."

"Flight connection times. Need to move flight times to arrive during the day and not during midnight/early morning."

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. This figure is consistent with the 2012-2013 annual average of 93%. Most of the respondents thought the Cook Islands provided a wonderful experience due to the relaxed atmosphere on the islands, the unspoiled natural environment, the overall great holiday destination and the welcoming and friendly local people. These four themes cover the major part of the responses.

Thirty-nine percent of those surveyed mentioned the relaxed and laid-back atmosphere of the island they visited. This atmosphere was noted as the most attractive part of the Cook Islands when considering a return visit. Visitors would return to the Cook Islands because of the 'slow pace of life' and 'the beauty of the natural environment'. Visitors used key words such as 'relax', 'relaxing', 'relaxed', and 'laid' – indicating the emphasis they place on the islands as a place to completely relax. Comments included:

"It is a very relaxing part of the Islands just to chillax."

"Beautiful beaches, relaxed feeling."

"Was lovely to relax away from fast pace of everyday life."

"Great place to just relax."

"Lovely place, very laid back, nice atmosphere."

The warm climate and natural beauty of the Cook Islands was noted by 33% of the visitors as a significant factor in leading people to want to return. The respondents enjoyed the beautiful unspoilt scenery, the lovely lagoons, the gorgeous coral reefs and white sandy beaches and the warm climate. Comments included:

"I love the south pacific climate."

"Spectacular beauty and wonderful people."

"Fabulous islands, friendly, amazing water and water activities, and beaches."

"Gorgeous coral reef, not crowded with tourists."

Those who stated that they had an overall great experience (29%) mentioned that their trip to the Cook Islands was 'amazing', 'beautiful' or 'great', and that they 'loved it' and that the islands are 'the favourite holiday destination' and 'a paradise on earth'. Respondents also mentioned that they would 'definitely return', are 'already planning to return' or they would 'continue to come back' bringing more people along. Comments here included:

"I feel at home in Raro, and love living a simpler, slower paced life where the priorities are family and home life."

"It is one of the best destinations we have visited."

"It exceeded our expectations and was idyllic."

"The best place on earth, as close to Paradise as you can get."

Just under one quarter of the visitors (21%) identified the friendly, helpful and welcoming local people as a significant feature that encourages them to return to the Cook Islands. Respondents commented:

"Because it was like paradise and the people treat you very friendly."

"We love the people!"

"The staff at the resort made out holiday. The locals are so friendly and helpful."

Those respondents (n=50) who said they would not be returning to the Cook Islands, commented on the high cost of the overall trip, the distance, the lack of activities in case of bad weather conditions and occasionally the attitude of the locals . Comments here include:

"Too far and too expensive."

" It's a long flight and there is little to do if the weather is really bad, food costs."

"We were so disappointed in the service and the price of things, and what the locals were ripping us off that we do not want to return. I am embarrassed for the residents."

The majority (80%) of the visitors mentioned that they would like to include the outer islands in their next visit. Most (68%) of the visitors surveyed in this quarter mentioned they would like to include 'Aitutaki' in their next visit to the Cook Islands. 'Atiu' was the second most mentioned island at 12%; another 17% of visitors stated that they were 'not sure' of which islands to include, and 7% of visitors mentioned they would like to visit 'all the islands'. Other visitors mentioned they would like to visit some of the islands belonging to the Northern Group (4%) or the Southern Group (1%). 'Mangaia' was mentioned by 2% of visitors as future possible destination. Only three percent mentioned the high cost of visiting other islands as a barrier for not visiting.

Nearly all visitors surveyed (98%) said that they would recommend the destination to their family and friends. Half of the visitors stated they would recommend the Cook Islands because of the 'atmosphere'; this was again described as 'relaxing', 'peaceful' and with a laid-back lifestyle. Respondents felt that the Cook Islands was a great place to chill out, energise and recharge their batteries and they would recommend the Cook Islands as a good holiday destination for those who could do with a break away from their busy lifestyle. Another aspect of the relaxing holiday was noted as *'you can do as little or as much as you want to'*.

Thirty-seven percent of respondents stated that 'the environment' of the Cook Islands was a reason for recommending the island nation to others – including the physical beauty, the warm climate, the pristine waters and beaches – 'a paradise on earth'. One quarter of the respondents would recommend the Cook Islands because they had a great experience there themselves. These visitors stated the Cooks to be simply 'amazing' and 'awesome' and that they just 'love the place' describing it as 'definitely a must do in life'. Almost a quarter (23%) of the visitors mentioned the 'friendly local people' as a recommendation of the Cook Islands. Other themes that were mentioned included the attractions and activities available (11%), the convenience of the islands as a destination – especially for New Zealanders and Australians (10%), food and beverage options (7%), affordability of the holiday (7%), the ease of New Zealand currency and language (6%), already have recommended to others (5%), the islands being a family friendly destination (3%), the Cook Islands culture (3%) and the accommodation available (3%).

Comments included:

"I am constantly recommending the CI's. I have a standard email I send out with tips!"

"Because everyone should see its beauty at least once! ... Though, it might be a double edged sword, and make the place more commercial. It's perfect just as it currently is."

"Convenient, warm and relaxing - the perfect escape from the everyday rat-race."

"Because we had a beautiful stay and I highly recommend people to experience what we experienced."

"Truly a once in a lifetime experience."

Only 2% of visitors (n=24) would not recommend the Cook Islands to others, with their comments normally based on the overall expense of the destination and the relative lack of things to do.

Final observations

This report shows that the Cook Islands tourism industry generally performed well during the April - June 2014 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 previous 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. The on-going concerns around stray dogs should also be noted. Issues of petty crime are also mentioned by a very small, but consistent, number of visitors.

Visitor spend prior to arrival in the Cook Islands has decreased slightly from the 2012-2013 annual average (\$1,879 per person down from \$2,012), and spend on the island (per person per day) remains at \$115 (the same as the 2012-2013 average).

Overall the Cook Islands tourism sector is performing well but it remains important to look at ways to increase visitor yield in a sustainable manner. The 2013-2014 annual report will review this theme in more depth.

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.

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 the end of December 2013.

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 late 2013.

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, e.g. 26/06/2013)

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?

- a) Holiday
- b) Wedding party
- c) Business or conference
- d) Visiting friends or relatives
- e) Honeymoon
- f) Special event – sporting
- g) Special event – cultural
- h) Volunteering
- i) Education

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

- a) Airline - Air New Zealand
- b) Airline - Air Tahiti
- c) Ferry
- d) Private charter plane
- e) Private boat

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

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

6. How many people accompanied you on this trip?

- a) 0 - travelled by myself
- b) 1
- c) 2
- d) 3
- e) 4
- f) 5
- g) 6
- h) 7
- i) 8
- j) 9
- k) 10+

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

- a) Rarotonga
- b) Aitutaki
- c) Atiu
- d) Mangaia
- e) Mauke
- f) Other

8. On your most recent visit to the Cook Islands, please indicate below (on a scale of 1 to 5 where 1 is 'very dissatisfied' and 5 being 'very satisfied') the activities that you engaged in and how satisfied you were with your experience.

Water based activities:

- a) Beaches
- b) Swimming
- c) Snorkelling
- d) Diving
- e) Kayaking
- f) Fishing - Deep Sea
- g) Fishing - Bonefishing
- h) Lagoon Cruise
- i) Ocean Cruise
- j) Whale Watching
- k) Kitesurfing
- l) Stand Up Paddle Boarding

Cultural interaction:

- a) Island Night Feast and Show
- b) Meal at a Cook Islands Home

- c) Church on Sunday
- d) Island Celebrations or Events
- e) Tumunu on Atiu
- f) Local Markets
- g) Dance / Language / Art Classes

Land based activities and Touring:

- a) Restaurants, Bars and Cafes
- b) Cultural Events
- c) Sporting Events
- d) 4WD Adventures
- e) Cultural Tour
- f) Treks and Trails
- g) Cycling
- h) Sightseeing
- i) Vehicle Rental
- j) Public Transport

Shopping:

- a) Pearls
- b) Arts
- c) Crafts
- d) Music
- e) Local Produce e.g Coffee, Coconut Oil etc

Please tell us about any other activities you participated in:

9. On your most recent visit, how satisfied were you with the following (on a scale of 1 to 5 where 1 is 'very dissatisfied' and 5 being 'very satisfied')?

- a) The information that was available when planning this trip?
- b) The information that was available during this trip?
- c) The cost of accommodation?
- d) The quality of accommodation?
- e) The experience of renting a vehicle?
- f) The experience of using public transport?
- g) The frequency of air transport within the Cook Islands?
- h) The overall level of service in the Cook Islands?
- i) The friendliness of the people in the Cook Islands?

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?

- a) No
- b) 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)?

- a) Adults
- b) 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 below:

- a) NZD
- b) AUD
- c) GBP
- d) USD
- e) EUR
- f) CAD
- g) Other - please specify: _____

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

- a) International flights
- b) Accommodation
- c) Meals
- d) Domestic transport
- e) Activities
- f) Other

15.1 After you arrived in the Cook Islands, how much do you estimate that you spent in each island (Rarotonga, Aitutaki and Other island(s)) in local currency (NZ\$)?

- a) Accommodation
- b) Restaurants, Cafes & Bars
- c) Vehicle Rental
- d) Petrol
- e) Domestic flights
- f) Public transport
- g) Cruising
- h) Groceries
- i) Shopping (e.g. souvenirs, clothes)
- j) Activities (e.g. water sports, sightseeing)
- k) Other

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

- a) Yes
- b) No

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

- a) Yes
- b) No

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

- a) Yes
- b) No

19. How satisfied were you with your overall experience of the Cook Islands (on a scale of 1 to 5 where 1 is 'very dissatisfied and 5 being 'very satisfied')?

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:

- a) 18-29
- b) 30-39
- c) 40-49
- d) 50-59
- e) 60-69
- f) 70+

23. Your gender:

- a) Female
- b) Male

24. What is your highest qualification?

- a) No formal qualification
- b) High school qualification
- c) Tertiary/University qualification
- d) Other

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

- a) NZD
- b) AUD
- c) GBP
- d) USD
- e) EUR
- f) CAD
- g) Other - please specify

26. Where do you live? (Please select from list of all countries)

Survey Powered By Qualtrics