

Cook Islands Visitor Survey

Annual Summary Report

April 2012 - March 2013

Prepared for Cook Islands Tourism Corporation

by

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www.nztri.org

May 2013



Overview

This report provides an easily accessible summary of the key findings from the four quarterly reports provided during the April 2012 – March 2013 period (Qtr 1 April – June 2012; Qtr 2 July – September 2012; Qtr 3 October – December, 2012; Qtr 4 January – March, 2013). Each quarterly report focuses on the following themes:

- 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, spend patterns).
- Visitor satisfaction (most and least appealing aspects of visit, overall satisfaction levels).

This summary report provides an overview of the key themes that have emerged through the year of research. The opening table presents key findings for all survey variables across the four quarters and also provides an ‘annual average’ where applicable.

The overall findings paint a picture of an industry that is performing well in many respects but which cannot afford to rest on its laurels. Visitor satisfaction levels are high for most of the experiences on offer and visitors are almost all happy to recommend the Cook Islands to others as a place to visit. Just as important is the fact that more than 9 in 10 visitors say that they would like to return to the Cook Islands themselves in the future.

Visitor expenditure prior to arrival (on airfares and packages) remained relatively constant across the four quarters (annual average of \$2012 per person per visit). Of this amount we estimate that 40% reaches the island economy (\$804 per person per visit). The amount of money spent by visitors whilst on the island ranged from a high of \$143 per person per day (2nd quarter) through to \$100 per person per day (4th quarter) – the annual average is \$126. The average visitor spends \$1,084 during their stay – making an important contribution to the Cook Islands economy. Thus, every 10,000 tourists generate \$10,840,000 in on-island spend, plus an estimated \$8,048,000 in pre-paid spend that reaches the island.

While it is clear that the tourism industry makes a vital, and undoubtedly undervalued, contribution to the Cook Islands economy, it is essential that further efforts be made to enhance yield per visitor. Such an approach not only creates more jobs and income for Cook Islanders, it also, inevitably enhances the visitor experience. A higher yield, value added approach will also place less pressure on the islands cultural and environmental resources as the focus shifts away from simply increasing visitor numbers.

By developing new product offerings and more importantly enhancing the quality and ‘value added’ of existing activities and experiences, the industry can increase visitor satisfaction and enhance the generation of local economic benefits. The detailed expenditure data presented in the quarterly reports can be used to guide areas of improvement in yield creation.

Visitor expectations are high and are often being met or exceeded. Intensifying competition from other Pacific Island destinations means that the industry must place considerable emphasis in the future on providing high quality visitor experiences. The areas that require most careful attention at the moment relate to the management of environmental quality, strengthening cultural experiences, and ensuring that food and accommodation services really provide value for money. It is critical that service levels meet visitor expectations and it is clear that there are opportunities for improvement in this area.

This report also reveals that cost effective on-line research can generate strong response rates and robust data and information that is of value to both the tourism industry and government policy makers. We believe that this approach is cutting edge in its application and represents a model that other nations in the region will look to follow.

Comparison of Cook Islands survey across 1-4 quarters

Aspect of comparison	First quarter	Second quarter	Third quarter	Fourth quarter	Annual average
No. of emails sent	3580	3153	2461	5226	Total: 14,420
Conversion rate	43%	40%	20%	27%	33%
No: of respondents	1551	2484	494	1391	Total: 5920
People covered					
<i>Adults:</i>	3143	2484	999	2715	Total: 9,341 adults; 1,214 children
<i>Children:</i>	437	346	99	332	
Gender					
<i>Female:</i>	63%	67%	62%	62%	64%
Age					
<i>50-59 year old:</i>	25%	30%	30%	27%	28%
<i>40-49 year old:</i>	23%	25%	20%	21%	23%
Country of origin					
<i>NZ:</i>	64%	76%	65%	55%	67%
<i>Australia:</i>	18%	18%	22%	25%	20%
Well educated					
<i>Tertiary level:</i>	72%	69%	65%	69%	69%
Household income					
<i>over \$100,000:</i>	50%	52%	45%	42%	49%
Airlines used					
<i>Air NZ:</i>	88%	79%	83%	77%	81%
<i>Virgin Australia:</i>	14%	24%	16%	22%	19%
No: of companions					
<i>1 companion:</i>	48%	43%	49%	48%	46%
<i>Solo:</i>	6%	6%	6%	6%	6%

Aspect of comparison	First quarter	Second quarter	Third quarter	Fourth quarter	Annual average
No. of visits to Cook Islands <i>1st trip:</i> <i>1-2 previous trips:</i>	48% 42%	63% 23%	61% 26%	64% 21%	59% 28%
Travelling with who? <i>Partner/spouse:</i> <i>Family group:</i>	63% 31%	66% 36%	67% 28%	64% 31%	65% 33%
Purpose of travel <i>Holidaymakers:</i> <i>Wedding party:</i>	69% 16%	8% 9%	73% 13%	68% 11%	73% 12%
Length of stay <i>Average nights:</i> <i>Stay for 1-2 weeks:</i>	8.2 94%	8.4 96%	8.7 94%	9.9 82%	8.7 92%
Islands visited on trip <i>Rarotonga:</i> <i>Aitutaki:</i>	99% 22%	98% 19%	98% 22%	81% 17%	94% 20%
No. of previous visits <i>1-2 times:</i> <i>3-4 times:</i> <i>5+ times:</i>	NZ 46%, AU 35%, other 37% NZ 6%, AU 2%, other 2% NZ 9%, AU 1%, other 6%	NZ 26%, AU 13%, other 37% NZ 7%, AU 3%, other 5% NZ 9%, AU 1%, other 5%	NZ 31%, AU 21%, other 12% NZ 10%, AU 3%, other 7% NZ 6%, AU 2%, other 2%	NZ 26%, AU 13%, other 11% NZ 13%, AU 3%, other 7% NZ 10%, AU 6%, other 0%	NZ 32%, AU 19%, other 29% NZ 8%, AU 3%, other 5% NZ 9%, AU 2%, other 4%
Is Cooks visit part of a larger trip? <i>Cooks is the only destination on trip:</i> <i>Part of a larger trip:</i>	86% 14% - stop-over, (flight between USA & NZ)	86% 14% - stop-over, (flight between USA & NZ)	89% 11% - part of larger trip (around-the-world trip)	82% 18% - part of larger trip (around-the-world): 79% NZ, 31% Australia	85% 15% - part of a larger trip

Aspect of comparison	First quarter	Second quarter	Third quarter	Fourth quarter	Annual average
Overall satisfaction with Cooks visit					
<i>Very satisfied:</i>	70%	64%	67%	67%	67%
<i>Satisfied:</i>	24%	29%	27%	28%	27%
Satisfaction with activities	Water-based, cultural interaction, land-based and shopping: all have high satisfaction levels (greater than 4 out of 5)				
<i>Water-based:</i>	4.7	4.7	4.6	4.5	4.6
<i>Cultural interaction:</i>	4.6	4.5	4.7	4.6	4.6
<i>Land-based:</i>	4.4	4.3	4.5	4.5	4.4
<i>Shopping:</i>	4.3	4.2	4.3	4.3	4.3
Degree of participation in activities	Almost everyone participated in water-based activities and visited at least 1 restaurant/café				
<i>Visit local market:</i>	83%	84%	86%	84%	84%
<i>Experienced island night & feast show:</i>	69%	70%	66%	67%	69%
	Lowest participation was recorded for bonefishing and kitesurfing				
Satisfaction with different aspects of service in Cooks	Friendliness of local people – highly rated (out of 5)				
<i>Friendliness of local People:</i>	4.7	4.7	4.8	4.7	4.7
	Lowest levels of satisfaction: Cost and quality of accommodation, car rental experience and local public transport (although none was below 4 out of 5)				

Aspect of comparison	First quarter	Second quarter	Third quarter	Fourth quarter	Annual average
<i>Cost of accom:</i>	4.1	4.1	4.1	4.1	4.1
<i>Quality of accom:</i>	4.2	4.2	4.2	4.2	4.2
<i>Car rental exp:</i>	4.2	4.2	4.1	4.2	4.2
<i>Public transport:</i>	4.0	4.2	4.0	4.3	4.2
Average spend before visiting	\$1916 per person	\$2042 per person	\$1990 per person	\$2072 per person	\$2012 per person
	40% of the pre-paid spend flows into the Cook Islands' economy				
<i>The proportion of pre-paid spend that flows into the local economy:</i>	\$766.40 per person	\$816.80 per person	\$796.00 per person	\$828.80 per person	\$804.80 per person
Items included in money spent prior to arrival					
<i>Inter. Flights:</i>	89%	96%	95%	92%	93%
<i>Accom:</i>	80%	88%	81%	82%	84%
Spend while in Cooks	\$1148 whole trip	\$1157 whole trip	\$948 whole trip	\$990 whole trip	\$1084 whole trip
	\$140/person/day	\$143/person/day	\$109/person/day	\$100/person/day	\$126/person/day
Average spend/visitor/day while in Cooks					
<i>Canada/USA:</i>	\$147	\$148	\$139	\$121	\$139
<i>Australia:</i>	\$164	\$151	\$109	\$102	\$137
<i>NZ:</i>	\$130	\$136	\$109	\$99	\$120
<i>Europe:</i>	\$129	\$132	\$72	\$108	\$118
Most appealing factors	Beautiful natural environment, friendly local people, peaceful and relaxing atmosphere				
<i>Beautiful natural environment:</i>	49%	49%	44%	55%	50%

Aspect of comparison	First quarter	Second quarter	Third quarter	Fourth quarter	Annual average
<i>Friendly local people:</i>	46%	47%	50%	48%	47%
<i>Peaceful and relaxing atmosphere:</i>	36%	31%	32%	28%	32%
Least appealing factors					
<i>Poor services & facilities:</i>	23%	21%	26%	17%	21%
<i>Price of food and beverage, accommodation and activities:</i>	13%	15%	15%	15%	14%
<i>Rubbish lying around, stray dogs, chickens, lack of knowledge on environmental conservation:</i>	5%	6%	10%	10%	7%
Return to Cooks Yes:	95%	92%	95%	93%	93%
Like to include other islands to next trip	79%	78%	82%	81%	79%
Recommend Cooks Yes:	98%	97%	98%	98%	98%

Visitor response

Fig. 1: No. of emails sent out

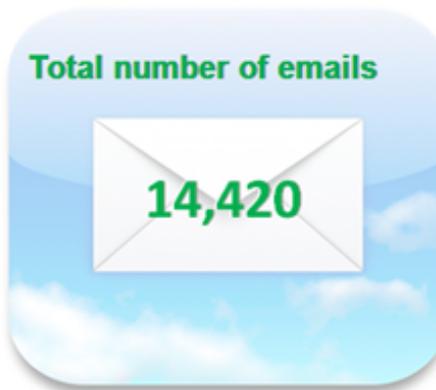
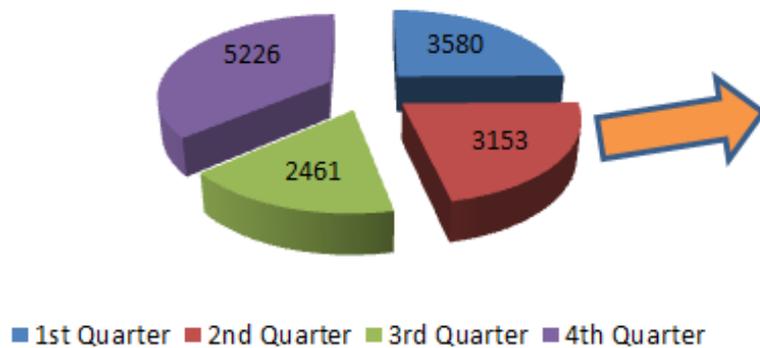
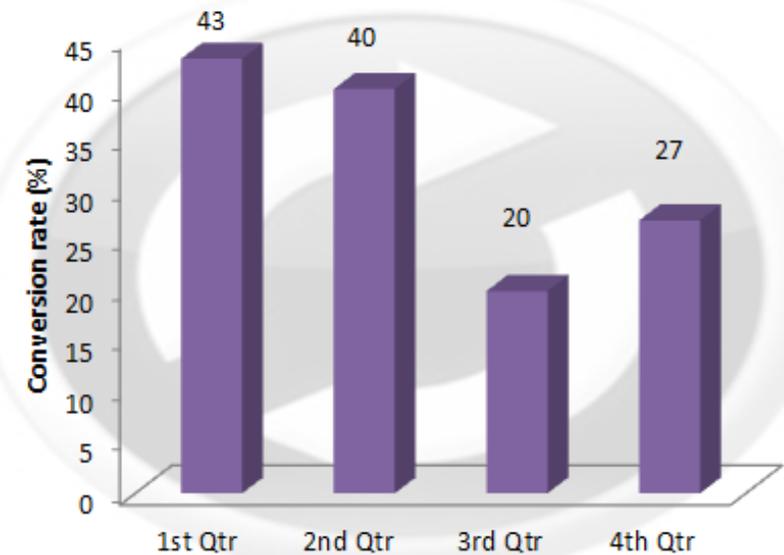


Fig. 2: Email conversion rate



The email conversion rate = (the no. of emails sent out/no. of survey respondents) *100

Visitor response cont...

Fig. 3: No. of respondents

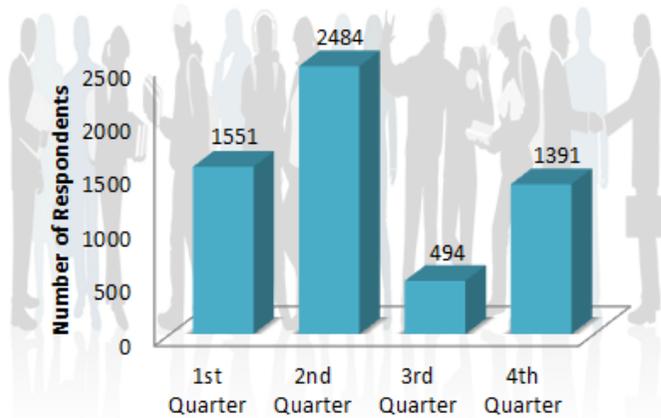


Fig. 4: No. of people included in expenditure analysis

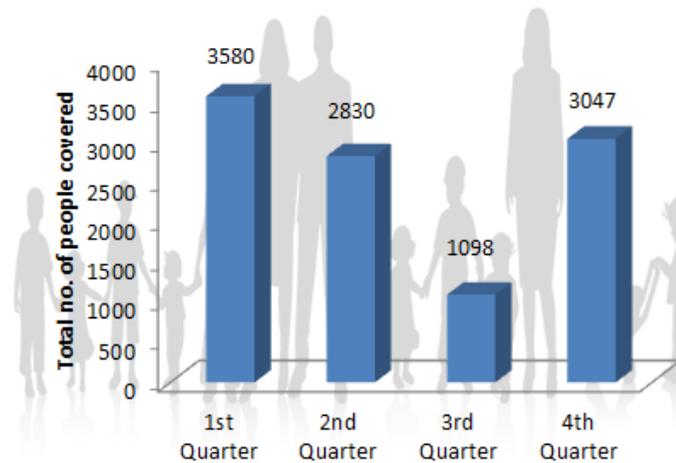
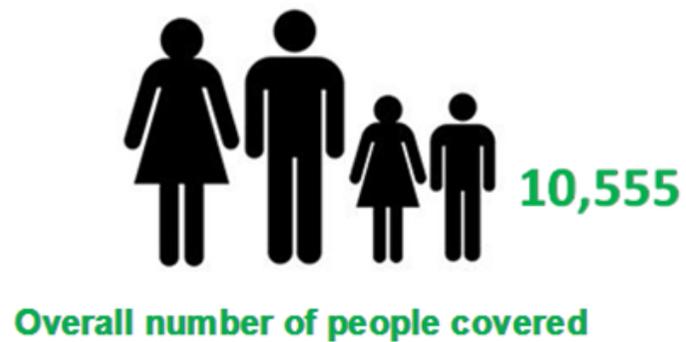


Fig. 5: Where do visitors come from?



Canada, Europe, Great Britain and the USA are the other key source markets

Fig. 6: Gender visitor ratio

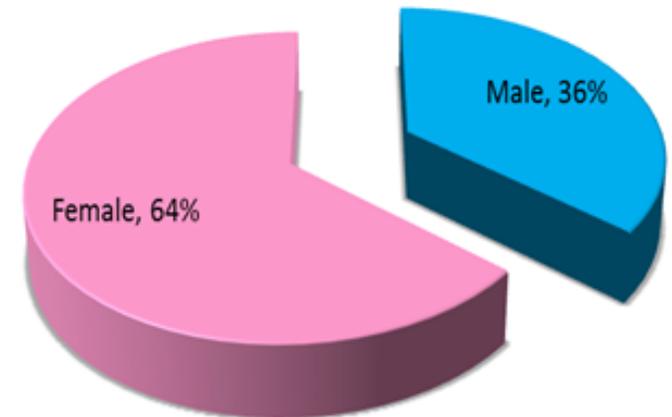
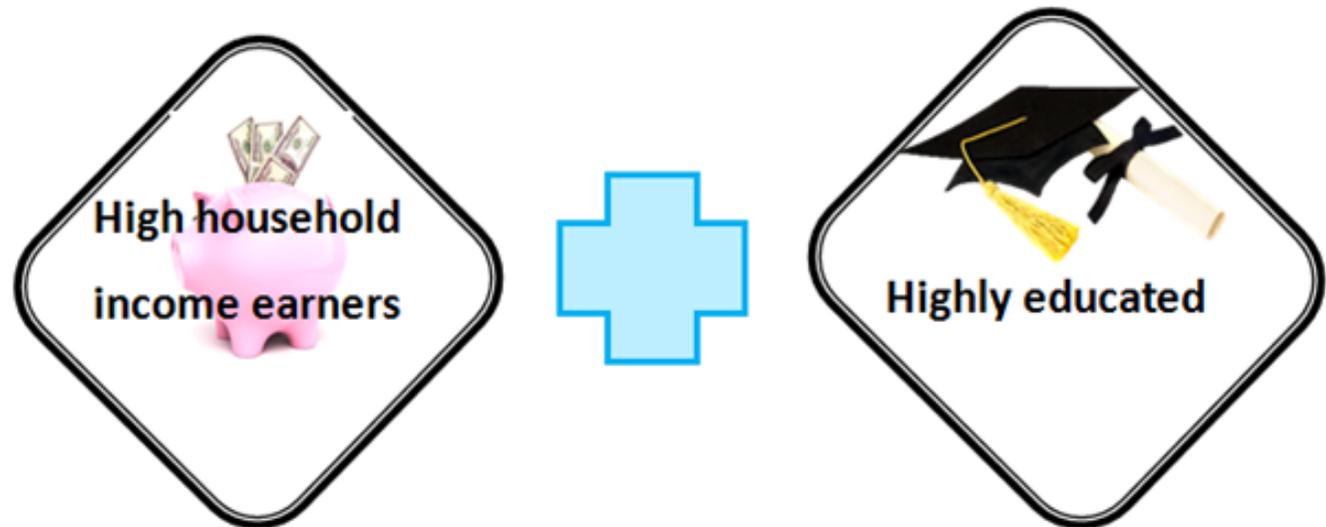


Fig. 7: Airlines used

81% AIR NEW ZEALAND 

 australia **19%**

Fig. 8: Who are these visitors?



For 85% of visitors, the Cook Islands is the only destination on their trip ...

Fig. 9: Travelling with who?

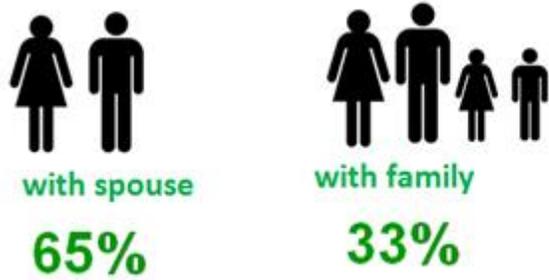


Fig. 10: Reasons for visit



Fig. 11: Length of stay

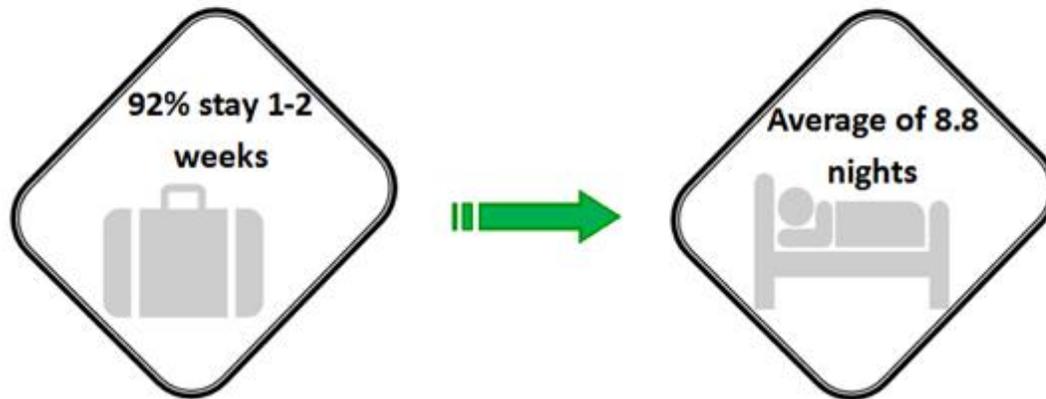
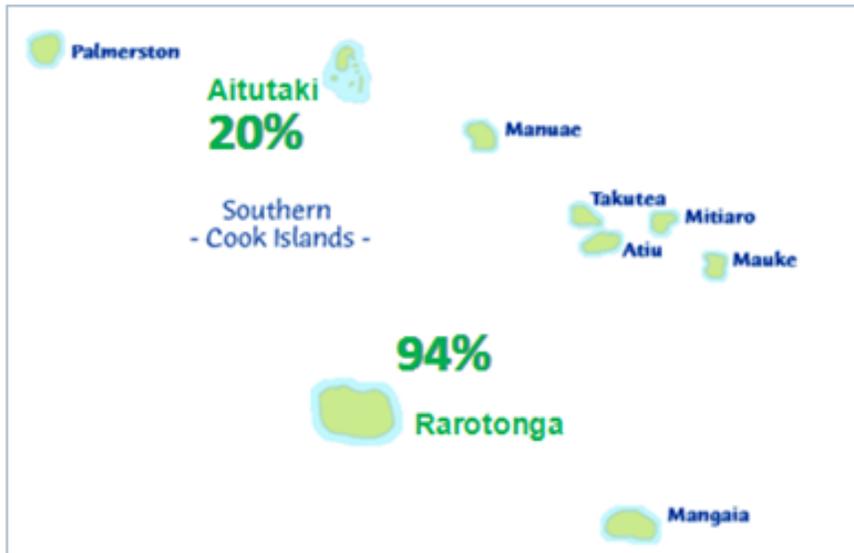
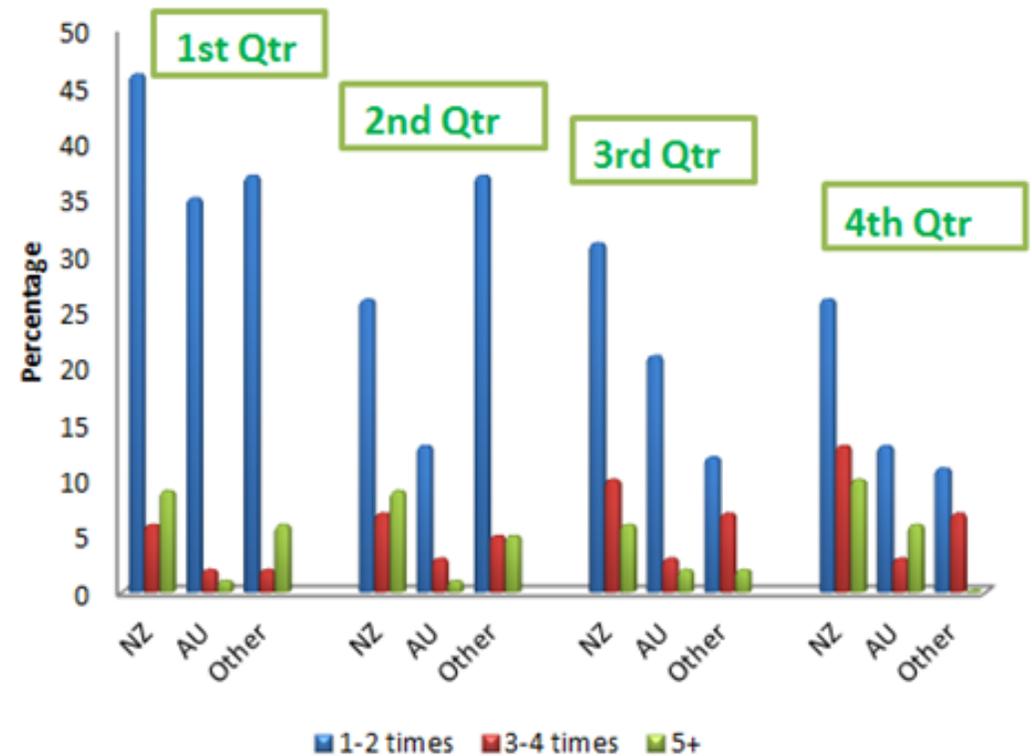


Fig. 12: Islands visited



79% would like to include other islands on next trip

Fig. 13: No. of previous visits



Expenditure

Fig. 14: Visitors' spend before and during their visit to the Cook Islands

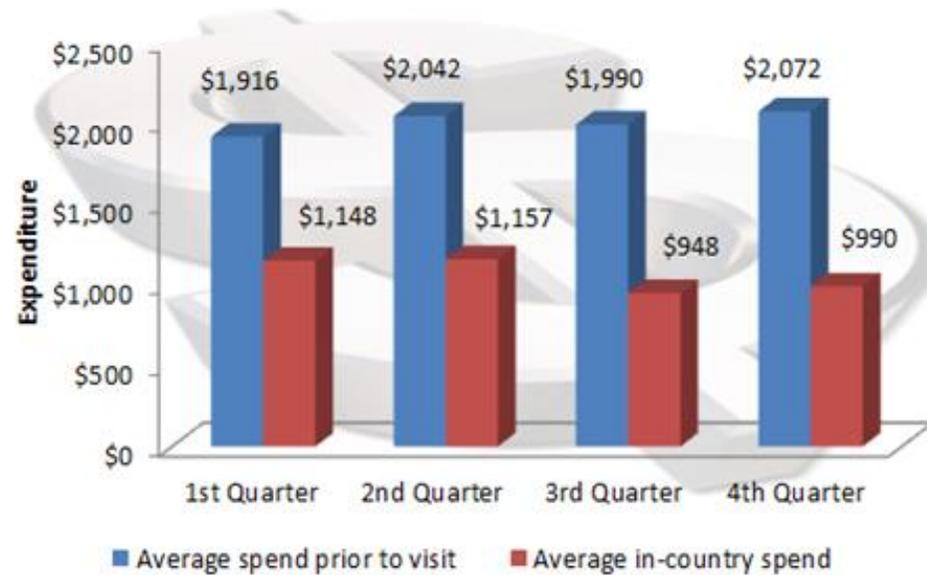
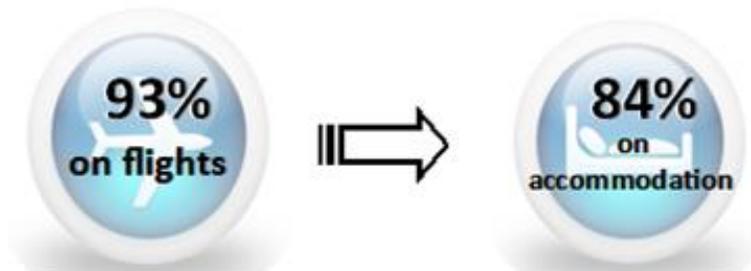


Fig. 15: Items included in spend before arrival



Of the prepaid amount, 40% flows to the Cook Islands

Fig. 16: Average spend/visitor/day while in the Cook Islands

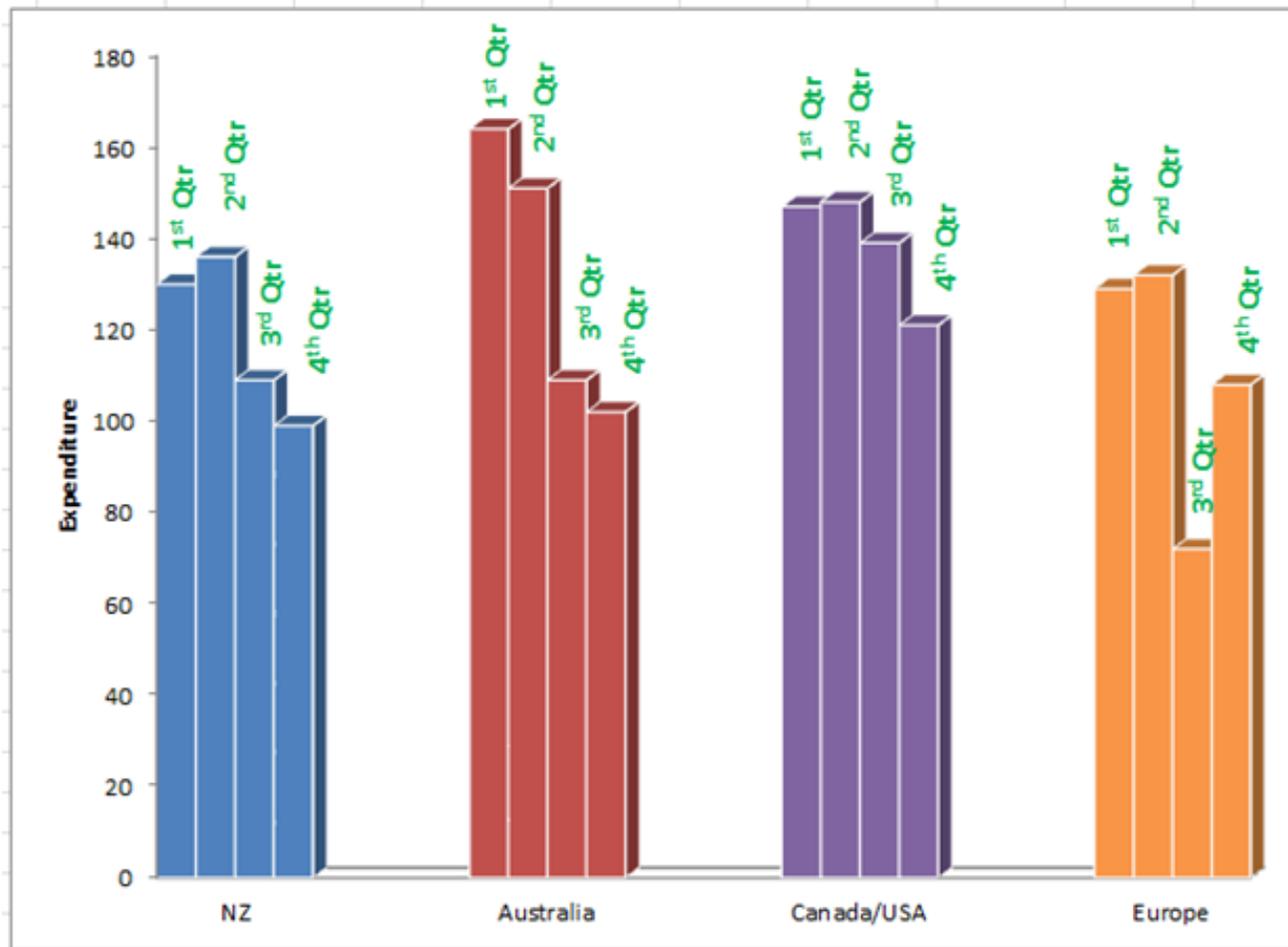


Fig. 17: Satisfaction with the Cook Islands' visit



Friendliness of local people (4.7/5)

Fig. 18: Participation in local activities



Visitors' satisfaction with local activities and services

Fig. 19: Higher levels of visitor satisfaction



Fig. 20: Lower levels of visitor satisfaction



Most appealing factors of the Cook Islands

Fig. 21: Most attractive features



Least appealing factors of the Cook Islands

Fig. 22: Least attractive features

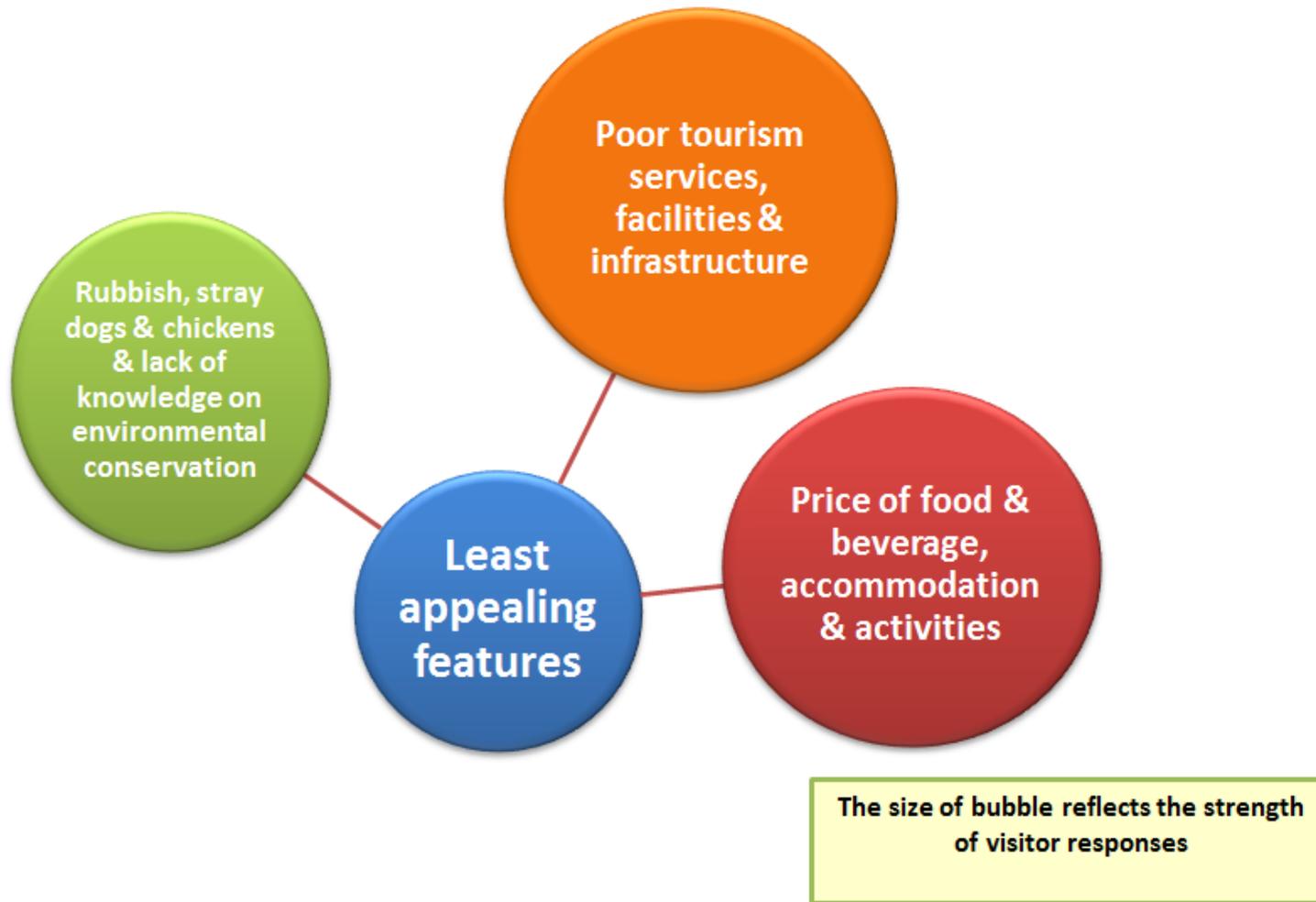


Fig. 23: Visitor recommendations

