

Cook Islands Visitor Survey Results

January - March 2014

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 2014. There were 1079 individual respondents to the survey - representing a total of 2022 adults and an additional 228 children (this equates to 10.9% of all visitors during the period – using 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 has increased slightly from the 2012-2013 annual average (\$2,023 per person up from \$2,012), and spend on the island (per person per day) has dropped slightly from \$115 (2012-2013 average) to \$108 (Jan-Mar 2014). The majority (48%) of visitors surveyed come from New Zealand, 24% come from Australia. Visitors are well educated (63.9% 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 (55%) of the visitors travel with just one companion. Solo travellers are relatively rare (7 %).

Nearly two-thirds of the visitors surveyed (67.7%) are on their first visit to the Cook Islands, a further 18.7% have visited once or twice before. The main purpose of visit is holiday making (75%). The average length of stay in the Cook Islands is 9.0 nights. The majority of the visitors (92%) stay either one or two weeks. Most (98%) of the visitors surveyed visit Rarotonga; 23% visit Aitutaki.

While in the Cook Islands, the total local spend per visitor per day is \$108 (compared to an annual average of \$115 for the previous year), and the average local spend per visitor during the whole trip is \$976. If the prepaid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,785 to the Cook Islands economy (or approximately \$198 per day). The 'in-country' spend is consistent with spend in the same period for the previous year (\$118 for October-December 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, and the peacefulness and relaxing atmosphere of the islands. Smaller numbers of visitors mentioned activities and entertainment, 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: 95% of those surveyed want to return to the Cook Islands and 99% 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 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 during 2012-2013 on a quarterly basis, and continues through 2013 to 2014.

This report presents the results from the January to March 2014 period. Over this three month period, 4575 visitors were contacted by email to take part in the survey, and 1079 responses were received: a conversion rate of 23.6%. These responses cover a total of 2022 adults and 228 children. The conversion rate for this period is lower than for the 2012-2013 annual average (33%) and the Jan-Mar 2013 quarter (27%).

The data presented include detailed information on:

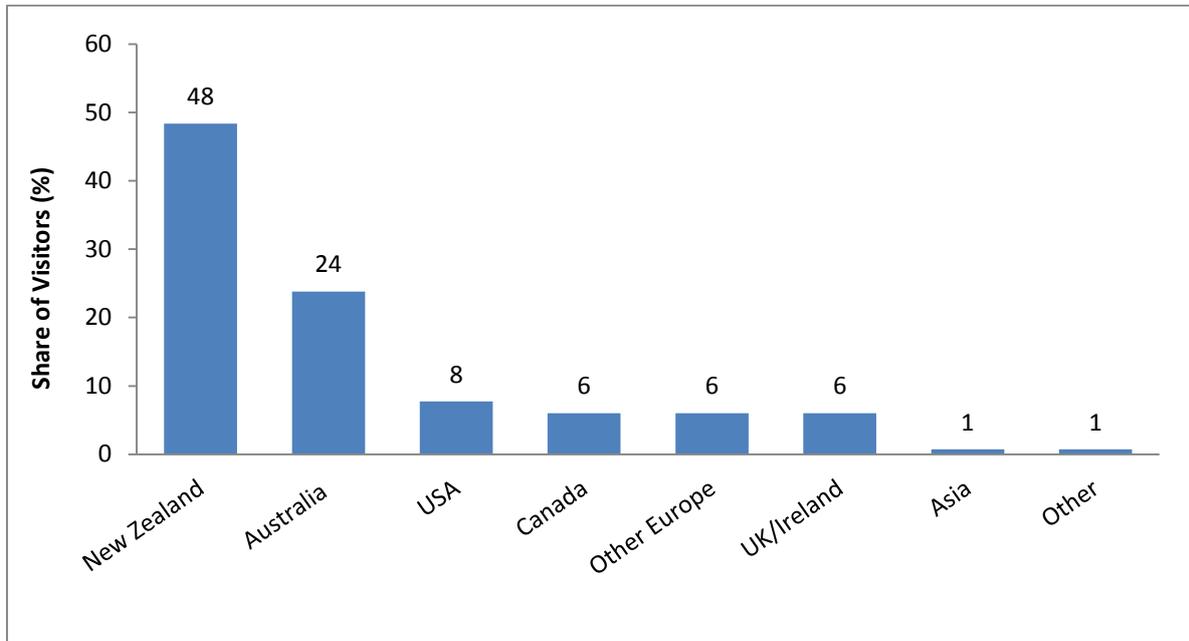
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook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

Visitor Characteristics

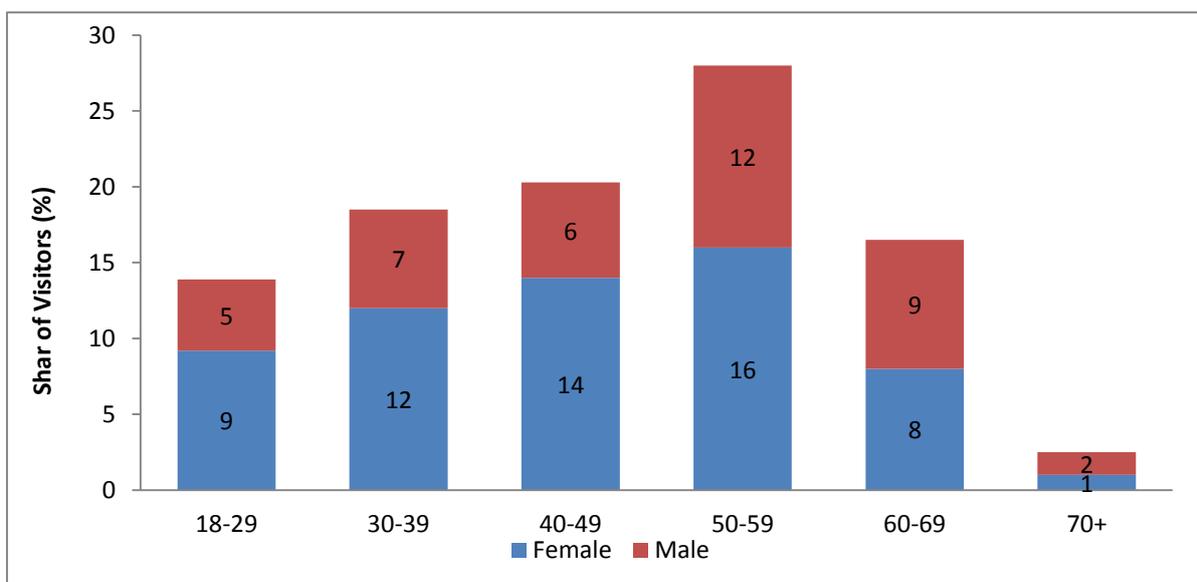
The majority of the visitors surveyed (48%) come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 24% of respondents. Europe, Great Britain, USA, Canada and Asia represent the other key source markets.

Figure 1: Country of Origin (n=970)



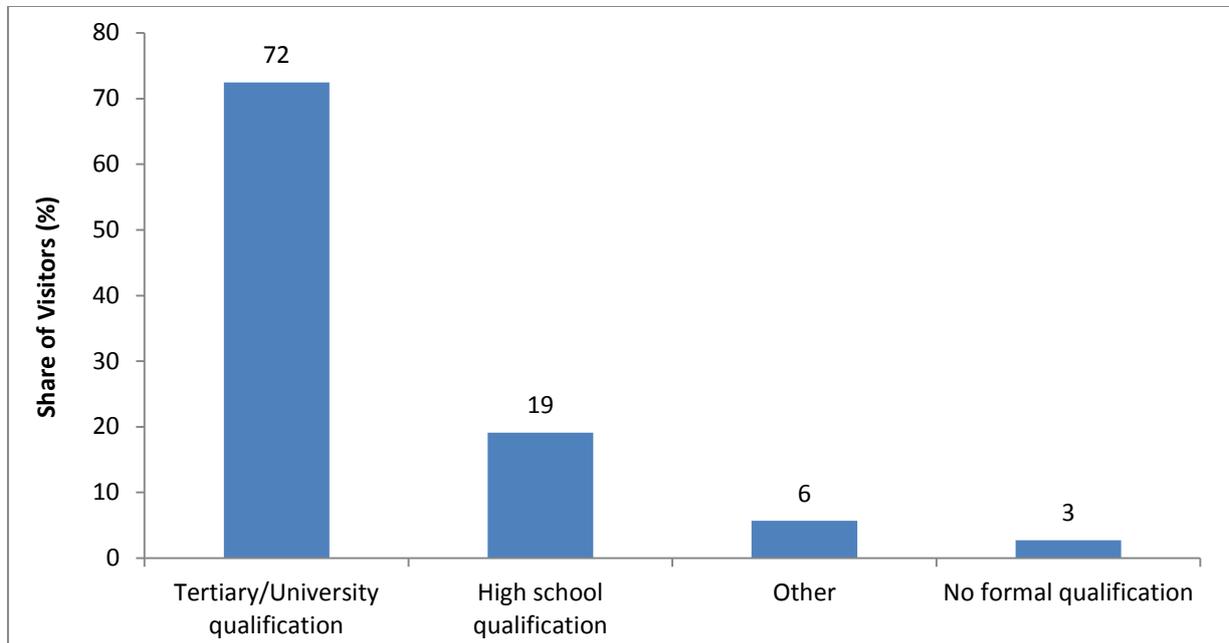
More women (60.3%) than men (39.7%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented age group, followed by the 40 to 49 and 60 to 69 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=933)



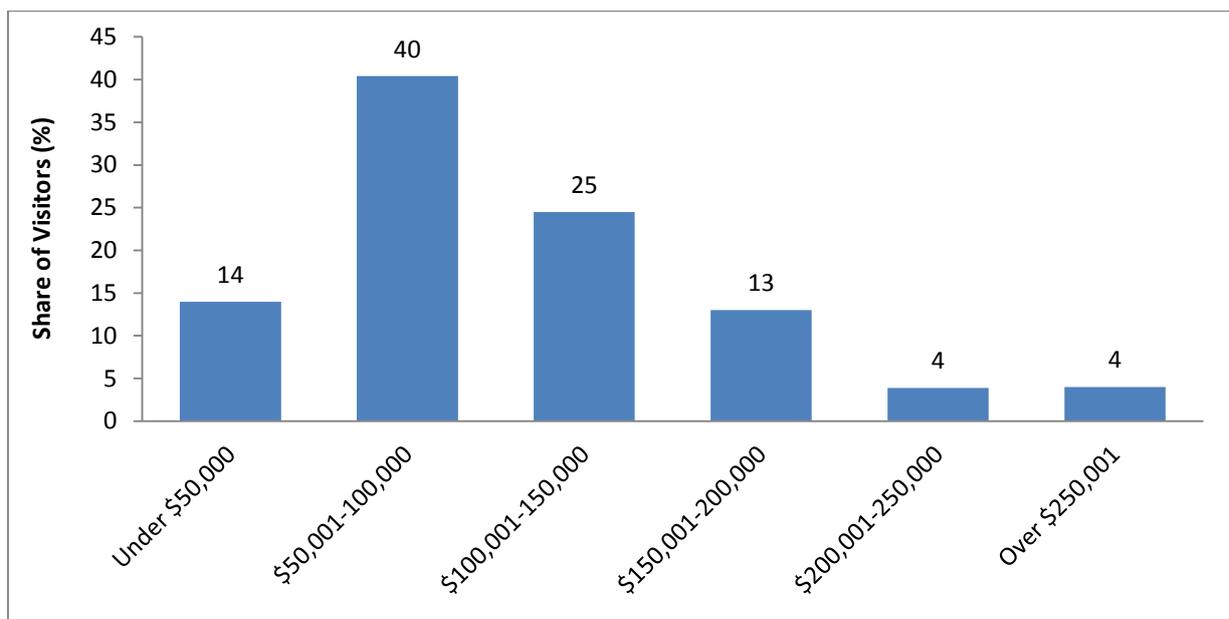
Visitors are well educated. More than two-thirds (72%) of the visitors surveyed had some form of tertiary qualification a further 19% completed education at high school (Figure 3).

Figure 3: Highest Qualification (n=951)



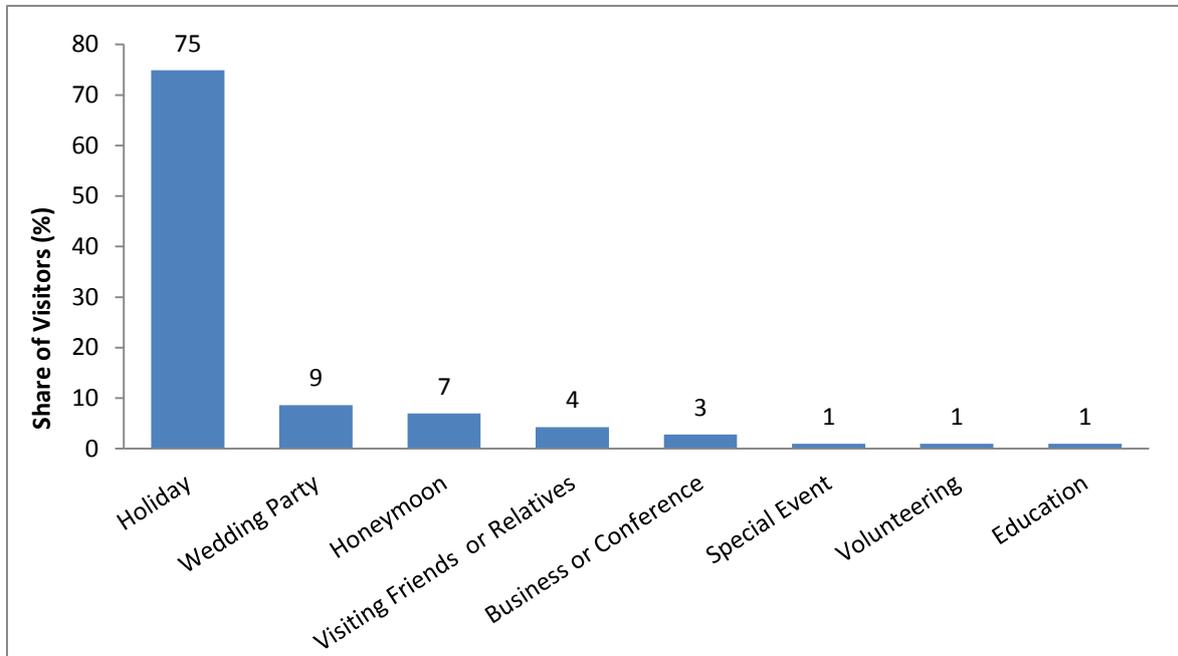
A significant group of visitors (40%) have an annual household income of between NZ\$50,001 and NZ\$100,000. A further 25% earn between NZ\$100,001 and NZ\$150,000. Nearly one fifth (19%) of the respondents have a household income of over NZ\$150,000 per year (Figure 4). The latest national statistics show a mean New Zealand household income of NZ\$85,588.

Figure 4: Annual Household Income in NZD (n=827)



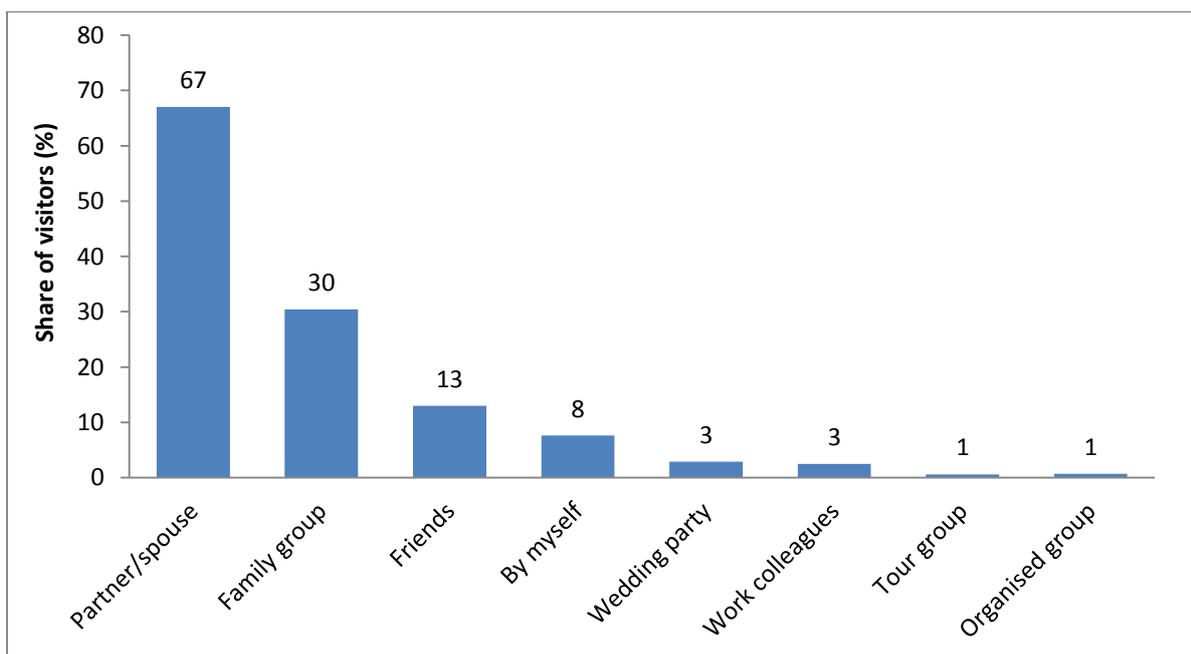
Three-quarters of visitors surveyed from January to March 2014 come to the Cook Islands for a holiday (75%), with the second major purpose of visit being to attend a wedding (9%). 7% came for a honeymoon, and 4% respondents visited friends/relatives. Just 2% of survey respondents came for business/conference travel or a special event (Figure 5).

Figure 5: Main Purpose of Visit (n=1079)



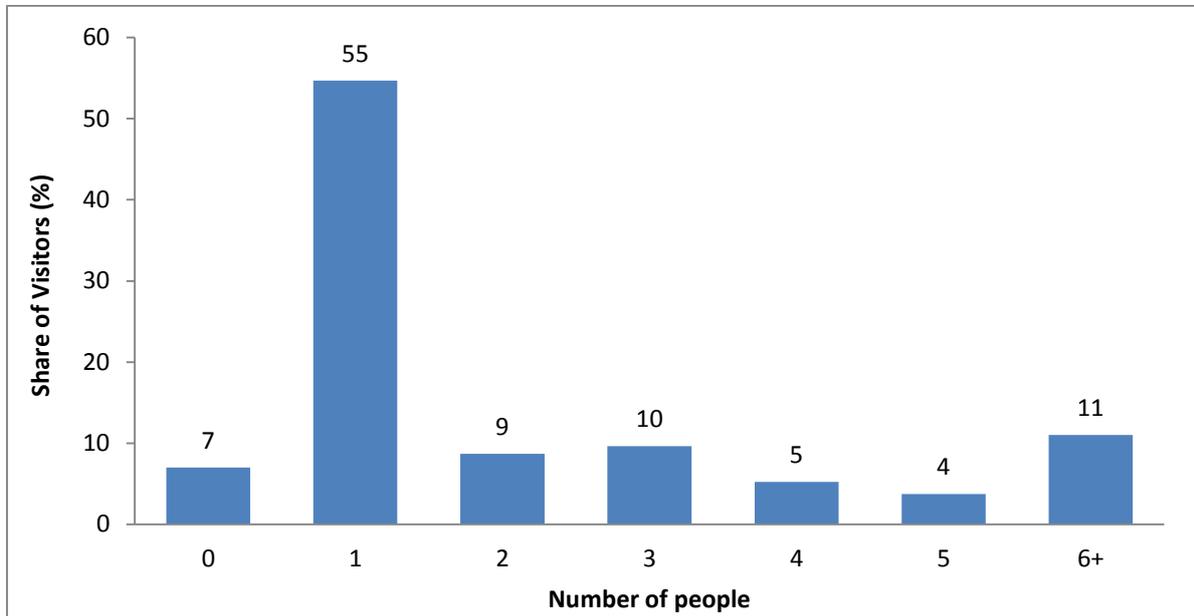
Just under two thirds (67%) of the visitors surveyed travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (30%) or friends (13%). Those travelling alone, with a wedding party, with colleagues or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with whom? (n=1072)



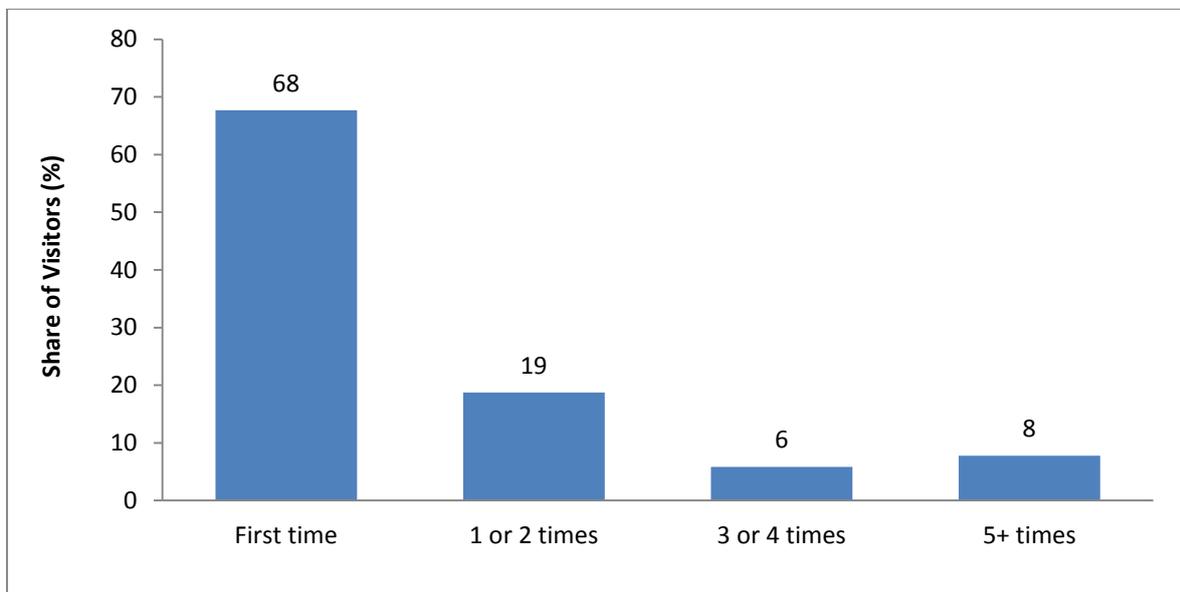
Over half of the visitors (55%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=1070)



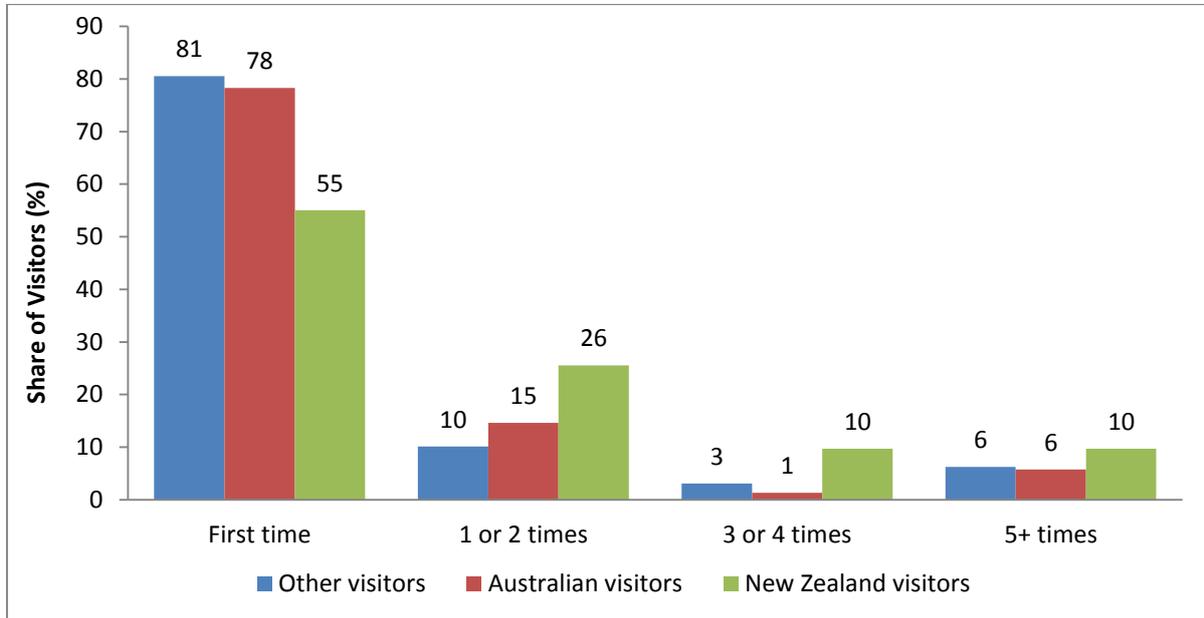
Most visitors (68%) are on their first visit to the Cook Islands. A further 19% have been to the Cook Islands once or twice before. A smaller group (13%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=940)



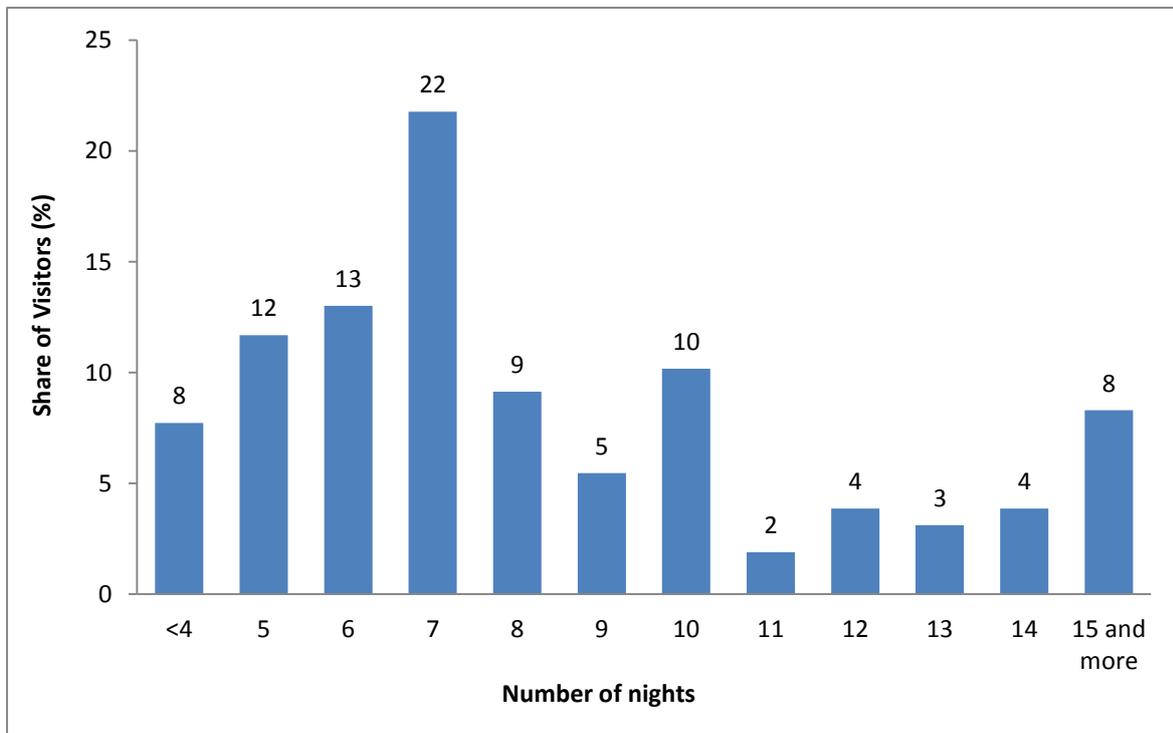
New Zealanders are more likely to be repeat visitors than those from other source markets (Figure 9). Twenty-six percent of New Zealanders have visited once or twice before compared to only 15% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=937)



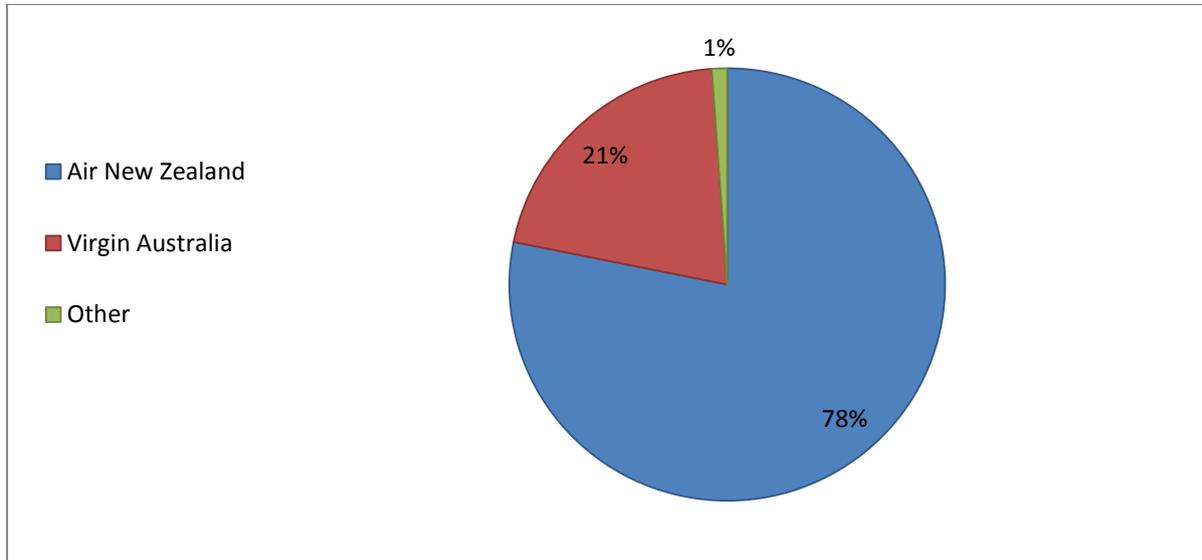
The average length of stay in the Cook Islands is 9.0 nights with 79% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=1061)



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.

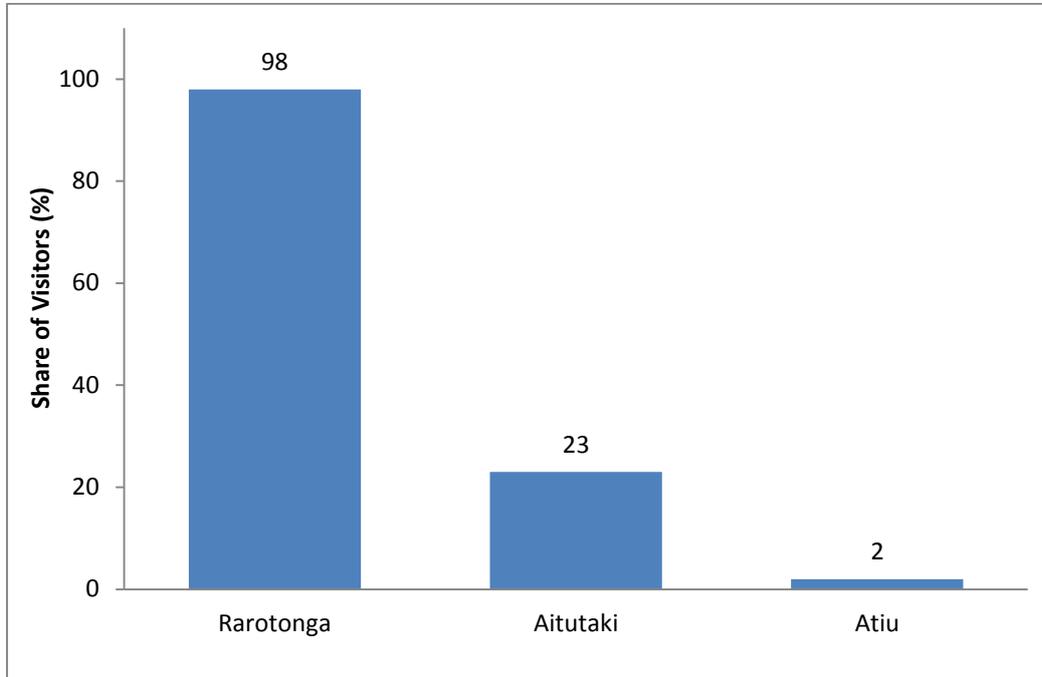
Figure 11: Airline used (n=1063)



For 80% of visitors, the Cook Islands represent the only destination on their trip. For 20% 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 (84%), second was USA (mentioned by 29% of respondents). Just over a quarter of visitors (27%) stated that Australia was part of their larger trip and 25% mentioned a destination in Asia. Other destinations mentioned by respondents included other Pacific Islands (10%), Europe (3%), South America (2%) and Canada (1%).

The majority (98%) of visitors to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (23%) (Figure 12). The other islands were not mentioned often by the survey respondents

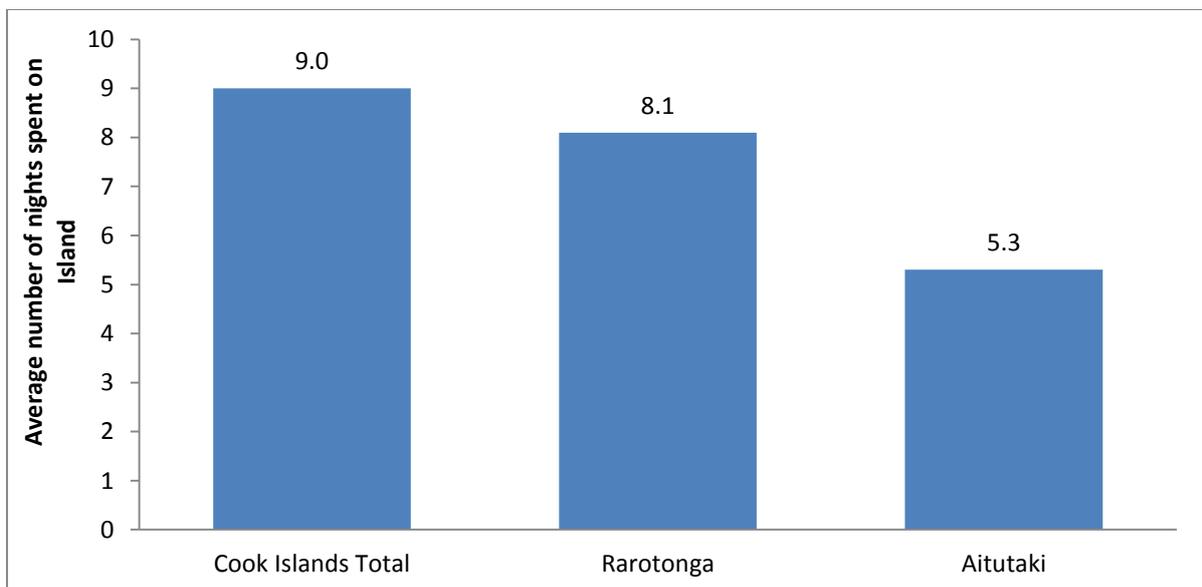
Figure 12: Visited Islands (n=1074)



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

The average length of stay on Rarotonga is 9 nights (Figure 13). For the visitors that went to Aitutaki, the average number of nights spent on the island is 8.1. These figures are higher than 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=1065)

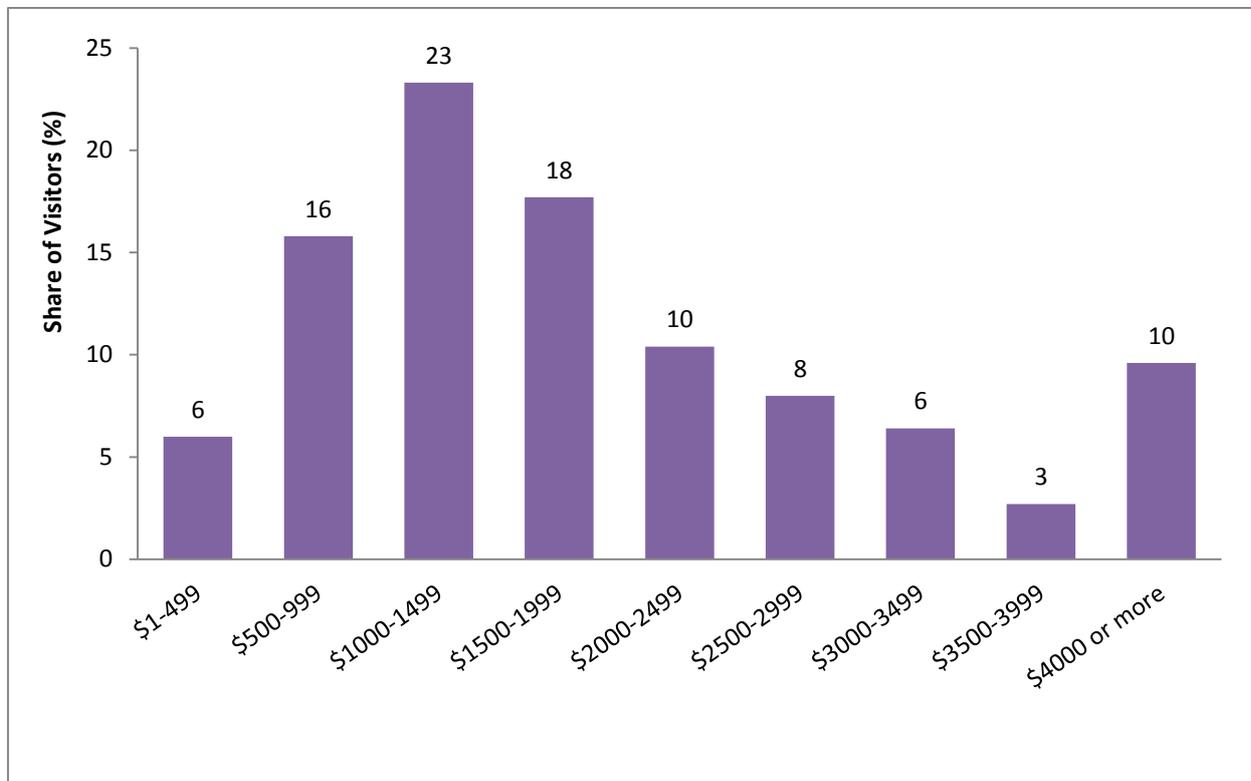


Visitor Expenditure

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 those they spent money on (e.g. spouse, children). The following expenditure section is based on the number of adults and children that respondents included in their cost estimates: 2250 people comprising 2022 adults and 228 children.

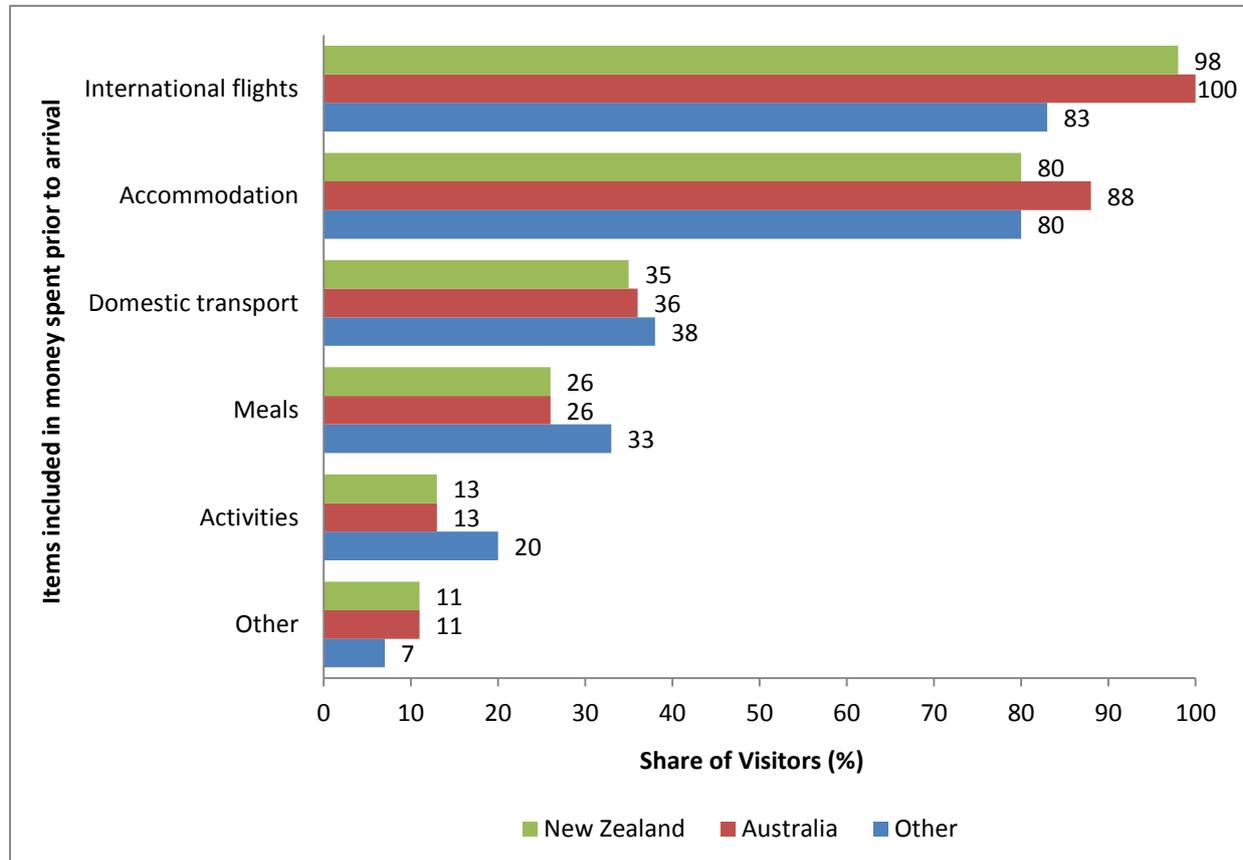
On average, visitors to the Cook Islands spend NZ\$2,023 per person prior to arrival. Most (51%) of the visitors spend between \$1000 and \$2500 dollars. These figures remain very consistent with the data from the previous year (average spend of NZ\$2,012 for the 2012-2013 period) (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=853)



Besides international flights and domestic transport, spending prior to arrival usually includes accommodation: in 80% of the cases for New Zealand, 88% for Australian visitors, and for 80% 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=895)



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 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 assess that the prepaid spend figure per day, excluding flights, is \$90 and for the average visit is \$809.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$108 (Table 1). This figure is very similar to the previous quarter (\$110 for October-December 2013) but is lower than the overall spend figure for 2012-2013 (\$115). Most money spent locally is on restaurants, cafes and bars (29%), accommodation (24%), shopping (15%), and groceries (8%). These per person expenditure figures are based on 994 survey responses covering a total of 2166 people (1942 adults and 224 children).

By multiplying daily spend by the average stay (9.0 nights) it is clear that each visitor spends on average \$976. The total figure of what is spent locally and what flows back to the Cook Islands from prepaid expenses is \$198 per visitor per day (\$108 plus \$90), or \$1,785 (\$976 + \$809) per total personal visit.

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

Expenditure Items	Overall n=994	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	31	29
Accommodation	26	24
Shopping	16	15
Groceries	9	8
Activities	8	7
Vehicle rental	7	7
Domestic flights	4	4
Other	3	3
Cruising	2	2
Petrol	2	2
Public transportation	1	1
Total expenditure per person per day	\$108	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

	n=243	n=482	n=1193	n=182
Expenditure Items	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	25	41	31	36
Accommodation	37	30	21	38
Shopping	16	16	17	19
Activities	11	11	8	9
Vehicle rental	6	9	8	4
Groceries	9	9	7	10
Other	4	2	3	3
Petrol	2	2	2	1
Domestic flights	7	6	2	7
Cruising	2	3	1	2
Public transportation	1	1	1	1
Total spend (NZ\$)	\$119	\$131	\$100	\$131

Australian spend for this quarter (\$131) was slightly lower compared to the 2012-2013 average of \$137, and European visitor spend at \$131 per person per day was up from the average of 2012-2013 of \$118. USA/Canada spend \$119 for this period it was 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 \$100 per visitor per day for the January to March 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 (74%) 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 (1%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=958)

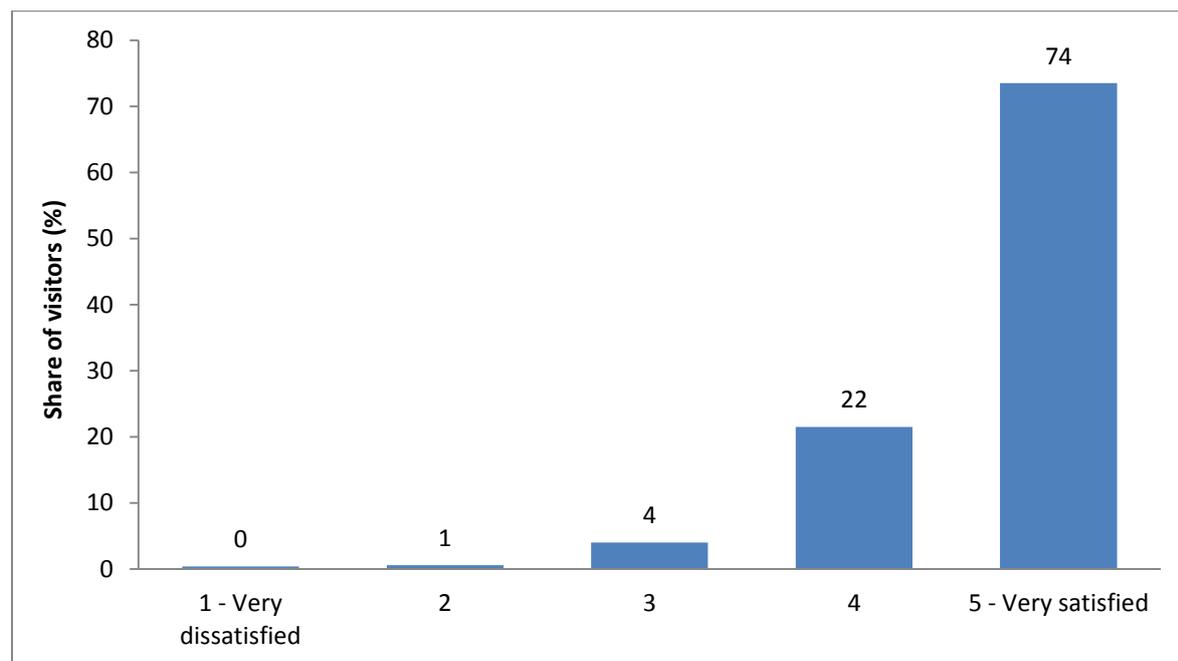


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (85%) visit a local market, and 68% 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 (4.6), land-based activities (4.5) and shopping (4.4). It should be noted that some activities e.g. kitesurfing, bonefishing, whale watching, and Tumunu on Atiu have relatively low level of participation.

Figure 17: Degree of participation in activities (n range=10-1049)

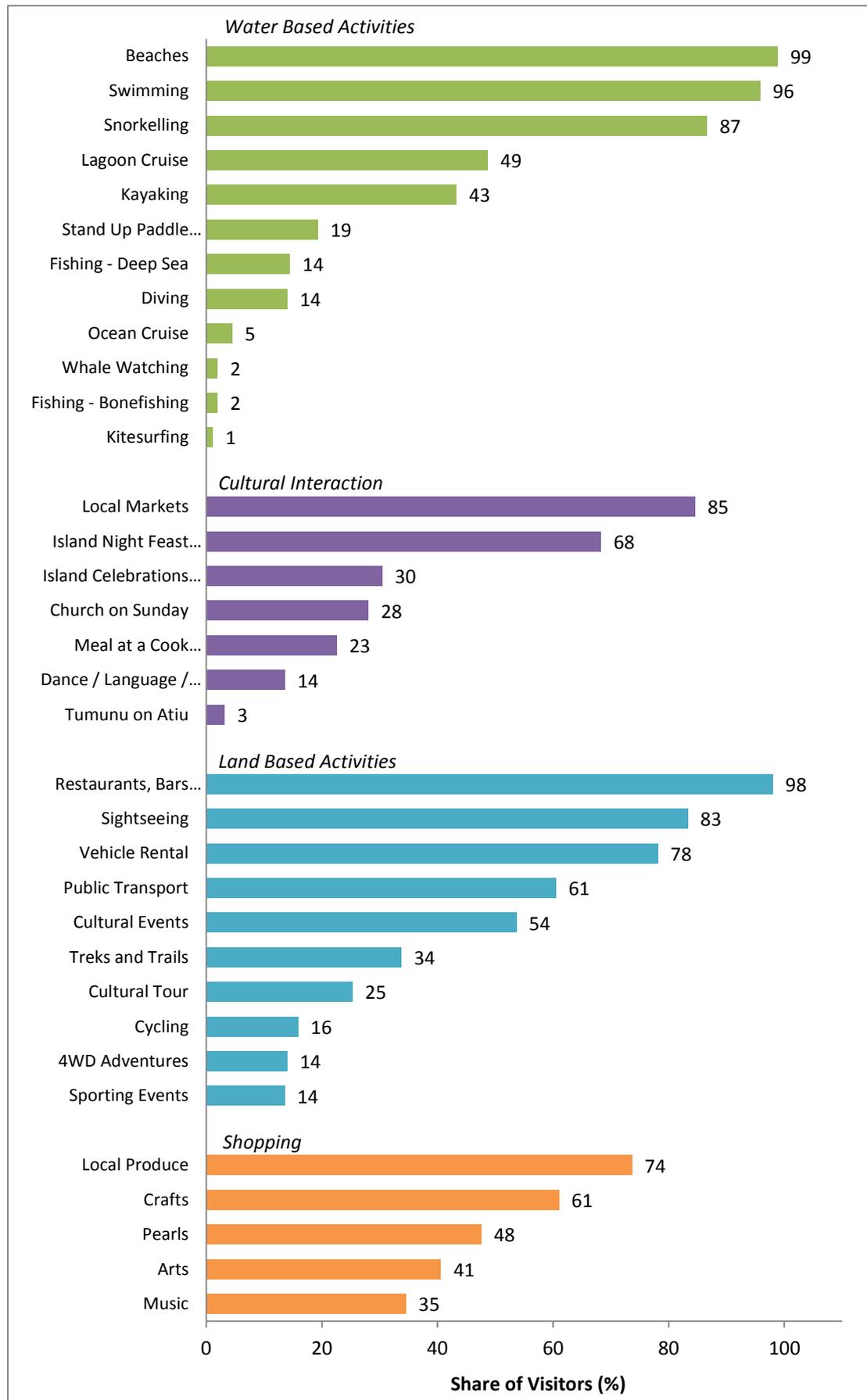
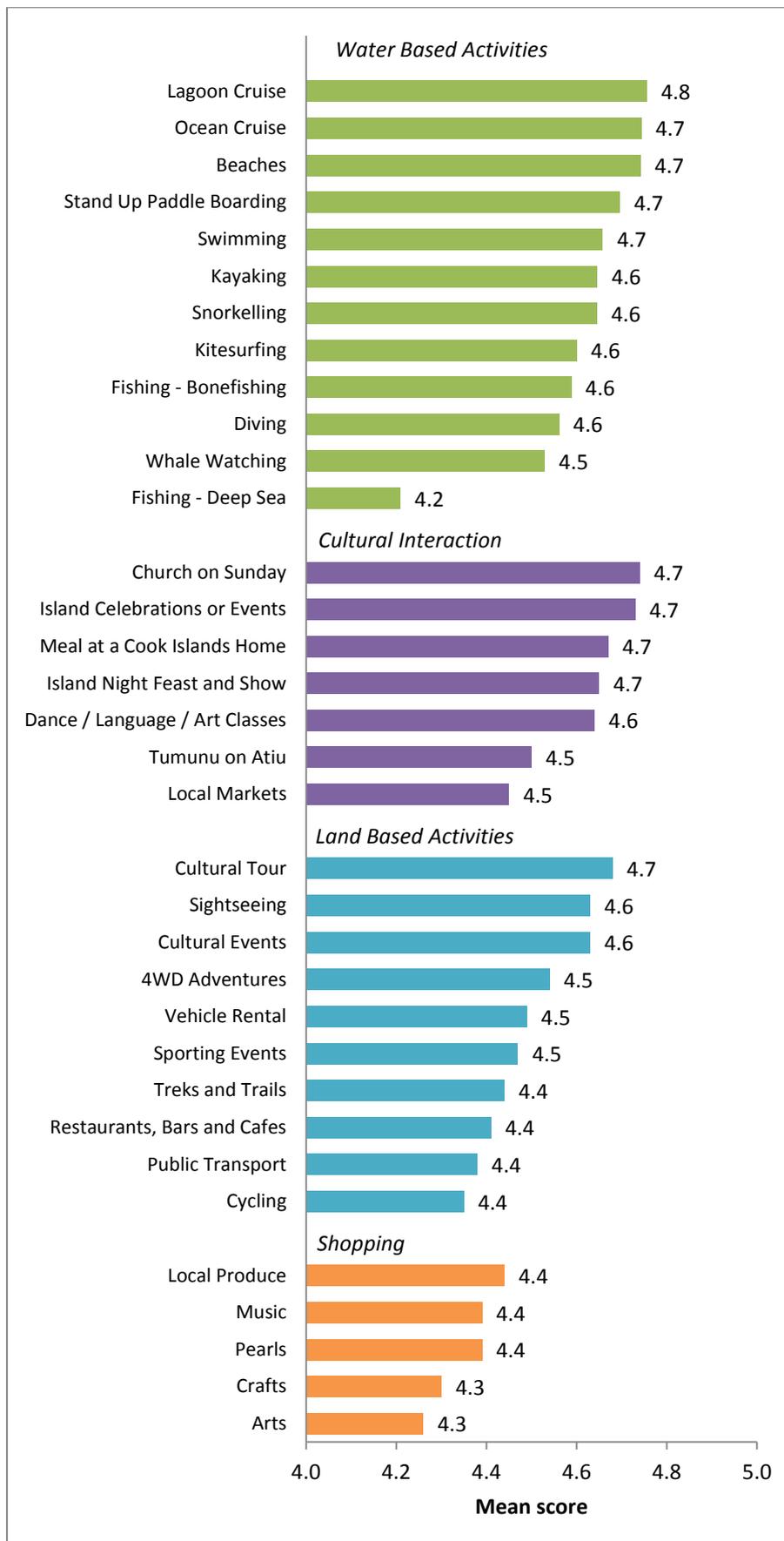
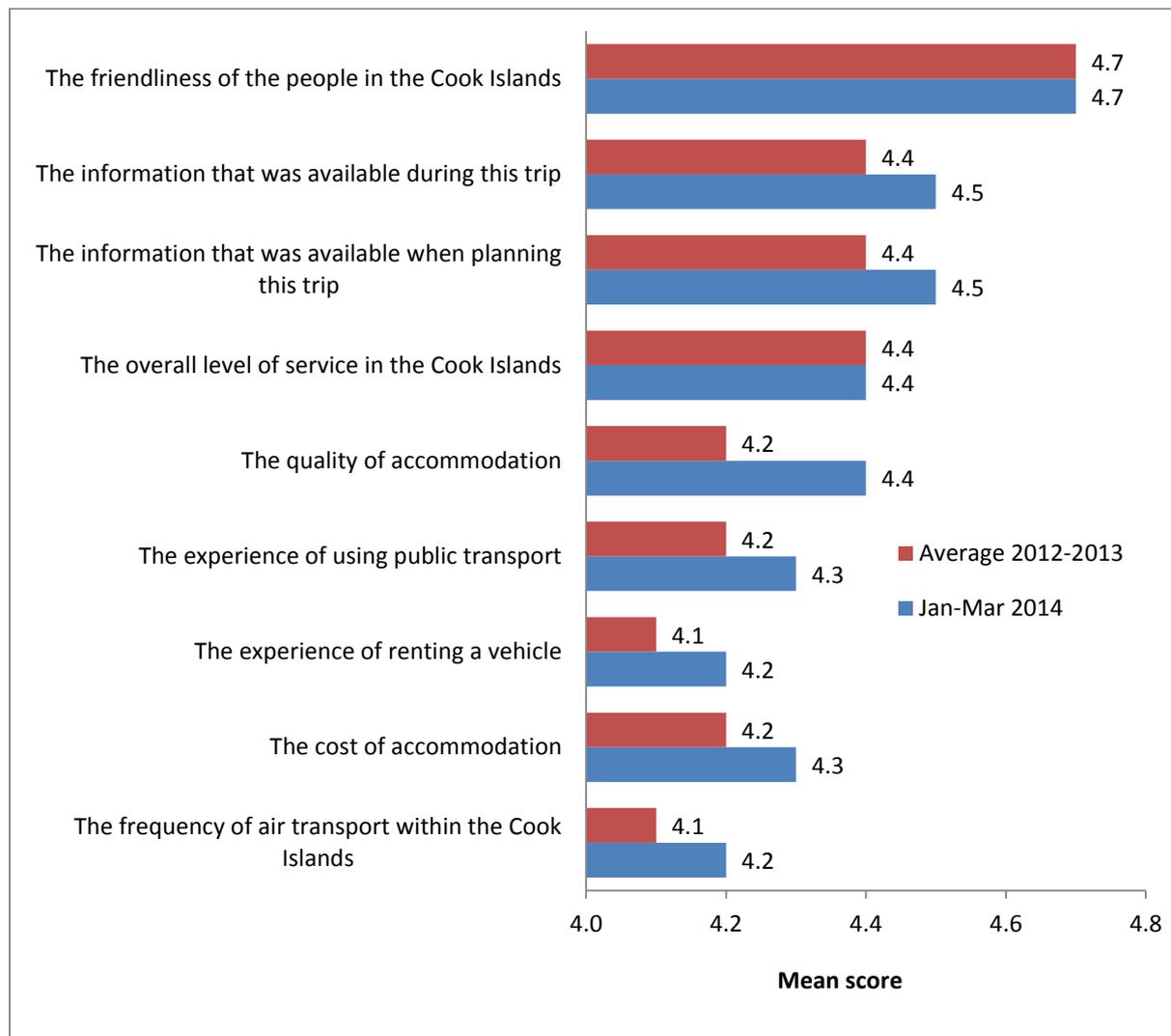


Figure 18: Degree of satisfaction in activities (mean score out of 5)



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 January to March 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 car rental experiences, local air transport, the cost and quality of accommodation and local public transport. In no cases though do scores fall below 4 out of 5. There is a slightly higher level of satisfaction across most items for the current quarter compared to the average for 2012-2013. This is an indication that visitor experience is improving, at least during this quarter.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5) (n=1075)



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, and the peacefulness and relaxing atmosphere of the islands. Smaller numbers of visitors mentioned activities and entertainment, 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=1021)

Themes	Share of respondents (%)
Environment	54%
Local people	41%
Atmosphere	32%
Activities, attractions, entertainment and events	18%
Food and beverage	9%
Level of service	8%
Un-commercialised	7%
Overall good experience	5%
Accommodation	4%
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

Just over half (54%) of the respondents considered the environment to be the most appealing aspect of their Cook Islands experience. Visitors used words such as ‘beautiful’, ‘paradise’, ‘tropical’, ‘clean’ 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.

Comments included:

“Beautiful beaches and stunning scenery”

“How clean the air and environment was. Being able to enjoy the presence of a diverse culture in a beautiful unspoilt island”

“Aitutaki was absolutely enchanting”

“Cleanliness. No rubbish. Very tidy”

“It is heaven on earth. The most beautiful place I have ever been”

Local people

Majority (41%) of respondents 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' and 'generosity'.

Comments included:

"The people are the selling point, beautiful people- always smiling and friendly"

"The local people are extremely helpful, welcome and kind"

"Serenity and welcoming family oriented people"

"The cultural experience wherein every Cook Islander we met was happy to inform us about their culture but also happy to accept ours"

"the friendliness of the people they are warm and big hearted and made you feel very welcome"

Atmosphere

Nearly one third of survey respondents (32%) 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 'remote', 'not crowded', 'safe', 'slow pace of life', 'tranquillity', 'simplicity' and 'relaxed' to describe the overall atmosphere. The notion of 'island time' was also frequently highlighted.

Comments included:

"We loved the serenity of the Island and being able to totally relax. The slow pace suited the holiday that we wanted"

"There is absolutely no distinction of how one is treated. Doesn't matter if your an islander, a foreigner or other -everyone is equal! The environment also makes you feel safe, people appear honest and come across as genuine"

"The warmth and friendliness of the local people and the warm atmosphere everywhere"

"The relaxed feel of the island and the people and the slower pace of development. It would be a shame if it was to become over-developed and lose the lovely feel it has now"

Activities, attractions, entertainment and events

Activities and entertainment were mentioned by 18% 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, diving and lagoon cruises. Land-based activities that respondents

mentioned included the experience of travelling around the island by scooter, shopping, cultural tours and local markets. Comments included:

“Snorkelling off the Rarotongan was the best snorkel we've ever done”

“Also the lagoon cruises are the highlight of my trip, definitely worth the money”

“I have been over twice to the Cook Islands and both times I have thoroughly enjoyed and recommend Te Vara Nui Dinner and Show”

“Rarotonga was very beautiful and enjoyed the most hiring a motorbike and driving around and seeing the island”

“The beaches and lagoon on Aitutaki as well as the deep sea fishing on Rarotonga”

Food and beverage

Nine percent of the respondents mentioned 'food and beverage', adding that they found these to be fresh, tasty 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:

“The gorgeous fresh fish meals and produce, there were so many choices, we loved every minute”

“The food is delicious, we ate in a variety of establishments all over the island”

“The people were great. There was a lot to do. The water was amazing. The coral reefs were fantastic. I loved all the cultural history. The restaurants were all very good to excellent. It was all I hoped for and more”

“The plentiful of fruits, mostly mangoes, bananas, passion fruits, coconuts, pawpaw, fish – maroro”

Level of service

Eight percent of visitors commented on the service they encountered while in the Cook Islands as being an appealing feature of their trip. Respondents had very positive things to say about the local hospitality, noting the friendly service from the staff in the restaurants/bars/hotels and airport being helpful and going beyond expectations. Again some respondents made comments on some very entertaining local bus or taxi drivers. Comments included:

“As has been the case on previous visits, the local people and there welcoming attitude are always the highlight.”

“Definitely the people! Delightful, happy, pleasant, helpful, kind, entertaining, / always having time to engage in a conversation.”

“Beautiful tropical setting with friendly people. A peaceful slower pace.”

“The friendly nature of all the wonderful islanders we met while on holiday and the customer service experience that has not been equalled elsewhere”

“From greeting at the Airport to the goodbye-speech of our Hotel Manager we were impressed by the friendliness of everyone on the Island - we loved it!”

Overall good experience

Seven percent of respondents simply stated that their whole experience was a good one. Visitors expressed their positive experience with ‘love everything’, ‘thoroughly enjoyable’ or ‘we will be back’. Comments included:

“Seriously best vacation ever”

“Honestly I want to be going back every year, twice a year if I could afford it”

“I just loved the whole island from the people to the beaches it is an amazing place”

“Everything was attractive and appealing, beautiful islands and wonderful people”

“I just love the place, visited there 14 years ago and am looking forward to returning. I find it difficult to define one aspect”

Un-commercialised

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

“The Independence and freedom from exploitation by international investors”

“The island was casual and not commercialized like Hawaii”

“It isn't overcrowded, and you feel like you are a part of the community”

“friendliness of all those whom we met, AND NOTHING very much had changed in the twelve years since my last visit, Raro was still the untouched tropical paradise I remember with no high rise and no pretension”

“I loved that it was not too crowded or commercialized, yet all amenities were available”

Convenience

Convenience of the Cook Islands as a destination was mentioned by a small proportion of respondents (4%). In particular, they referred to the ease of getting around the islands, and the convenience of using the New Zealand dollar and speaking English language. Comments included:

"We love using scooters to get around the island, meaning you are not restricted to one resort and free to go whenever you please"

"I am from New Zealand so the fact that they use NZ dollars and speak English made it so easy and stress free"

"Being able to hire a scooter so easily and jump on and off wherever we felt like it"

"The weather, the people and the bus service to get around the island"

Accommodation

Another 3% 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 'perfect', 'magical' and 'fabulous' referring to the quality of the offering, the setting and welcome from hosts. Comments included:

"The Little Polynesian was fabulous accommodation"

"Our accommodation was amazing just walking out straight from our room to the water"

"Beautiful beaches and lovely accommodation"

"Intimacy of Castaway resort, friendliness of staff and the snorkelling. / happy with prices of most things, transport and accommodation were great"

Least appealing aspects of the Cook Islands

Table 4: Least appealing aspects of the Cook Islands (n=952)

Themes	Share of respondents (%)
Public services and facilities	13%
Stray animals (dogs, roosters) and mosquitos	12%
Food & beverage	12%
Rubbish & natural environment care	9%
Accommodation	9%
Local people	8%
Price of goods & services	7%
Attractions & activities	5%
Poor weather	4%
Safety & poverty	4%
Flight/airline-related issues	3%
Becoming too commercialised/touristy	3%
Rental cars/scooters/bikes	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%.

Visitors were also asked *“What did you find least attractive or appealing about the Cook Islands on your most recent visit?”* Just under a quarter (23%) of visitors took the trouble to note that they found nothing was ‘unappealing’, that there was ‘all great’, or that the only unappealing aspect was that they ‘had to leave’. This group of visitors responded with comments such as *“nothing”, “everything is good and we just find the time is limited”, and “we travel to see and experience things that are different. The Cook Islands were different and enjoyable”*. There were, however, a number of areas that did attract comment (Table 4).

Public services and facilities

Thirteen percent 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, the state 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 shuts so early. Caught bus to town and it was all shut by 5pm.”

“I do not drive so public transport was a little difficult at times, especially when I left the resort to stay at a friend's private home. I felt rather stranded at times when I would normally have called a taxi...”

“I think the requirement to obtain a driver's license for a scooter is a money grab. Just have the dealer charge me and don't make me go to police station for a license.”

“Raro appeared very ‘tired’”

“The ridiculous rule of making tourists go to the police department where one person is taking pictures and issuing temporary drivers licenses to hundreds of people waiting in line for hours. This took a whole day off of our vacation and set the tone for the remainder of the holiday.”

Stray animals and mosquitoes

The stray dogs, noisy roosters and mosquitoes continue to be an annoyance or a worry for 12% of respondents during their time spent in the islands. This figure is slightly higher than the 2012-2013 annual average (9%). Respondents used a variety of words to describe this theme including ‘roaming’, ‘barking’, ‘animal cruelty’, ‘fighting’, ‘worry and ‘unattractive’. Comments included:

“Barking dogs in the middle of the night. All night long”

“DOGS!! Unleashed Dogs everywhere!! We stepped in dog poop multiple times on the beach. They ran all around us fighting and kicking up sand. The “dog lady” that walked her 5-10 unleashed dogs every day at 8am and 4:30pm couldn't give a rip about how out of control the dogs were. They even pooped right in front of my beach chair as well as others. She appeared to care less about it. They also chased young children out of the water”

“The dogs were definitely a hazard and there are too many dogs on the island and no sort of control of dogs. While I was driving I had to always be aware of dogs running out onto the road.”

"Inadvertent cruelty to animals (as perceived through tourist eyes)"

"Seeing piglets tied down in the hot sun."

Food and beverage

A number of visitors (12%) commented on the cost, quality and availability of food and beverage in the Cook Islands. Respondents noted that food was 'expensive' and 'disappointing'. 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:

"As a vegetarian, meals were quite hard to come by. Also cocktails at the hotel were very poor and very pricey."

"Food for children was mostly deep fried stuff - wanted to try more fresh seafood and produce"

"Grocery prices - though understandable as are imported."

"Quality of food in restaurants - it was very nasty cheap style takeaways. No offering of local food. I have travelled to Samoa and found quality of fresh fruit, vegetables and local produce amazing - was very disappointed with Rarotonga's food For a country that is heavily supported by New Zealand and relies heavily on tourism much needs to change. I won't be back and will continue my yearly Pacific Island trip to Samoa instead."

Rubbish & natural environment care

Other visitors (9%) mentioned rubbish and the lack of care of the natural environment in the Cook Islands as unappealing factors. Glass 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, degrading coral reefs and threatened marine life, also concerned a small group of visitors. Comments included:

"The absolute worst thing was the amount of overflowing rubbish up at the otherwise gorgeous waterfall - it smelled, and was the first thing we saw as we arrived up there. Not a good look for an otherwise beautiful island."

"Needs a tidy up along main road, such as power lines buried ... Erosion control at beach dunes and traffic control (channelling) to reduce damage."

"Rubbish strewn over beachfront at beach, we picked up some but was just as bad a few days later, soiled nappies was the worst, very sad."

"The poor quality of the coral close to shore. The poor information/education about how care and respect the local sea life. I.e. visual explanations on all the beaches telling to people (locals and tourists) that they shouldn't stand on the coral or paddle board and kayak over it at low tide (or high tide) as it is VERY fragile and very easily damaged by feet and oars... and it takes years to regenerate. This is the one thing that really upset me during my visit. I really wanted to see people respecting and taking a little more care of this fragile ecological environment."

Accommodation

Nine percent of visitors commented on the 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. Comments included:

"Accommodation that was far more run down than advertising led us to believe."

"Our hotel room, the fridge was filthy and our bathroom door didn't close properly. Not very romantic when the bed is right there next to the unclosable door."

"The staff at the resort didn't seem to care that we were there or when we needed things. Customer service is the last priority for the resort manager. I have never stayed at a resort where I was treated as so unimportant."

"Expensive accommodation, not enough budget options."

"Cost of accommodation does not equate to the expected standards throughout the rest of the world. For \$500 a night elsewhere we could get a lot better accommodation - and the argument that Cook Islands has higher costs is not relevant in all cases. We have travelled extensively and outside major cities (where accommodation is always expensive), Cook Islands is the most expensive accommodation we've come across. We don't mind paying, but we expect the standards to be much, much higher for this money."

Local people

A number of visitors (8%) found that the local Cook Island people did not seem as friendly towards visitors as they used to be. Visitors surveyed commented on how customer service in general was poor, and how local people showed no real interest in visitors – with the visitors getting the feeling that the local people are 'over' the tourists. Comments included:

"Customer service in the shops and supermarkets, it was appalling and made our holiday/honeymoon experience horrible. I have been travelling to the Cook Islands for 30 years and it is the first time that I have noticed this, it is very bad and has put me off coming back again."

"The service in some places was unfriendly, muted expressions, some appeared to treat us like we were just another tourist. Not all were like that but there were enough who weren't interested to give reasonable service. No one asked where we were from except for other tourists."

"People are not friend anymore! Attitude of local Rarotongas changed dramatically over the past 20 years!"

"The people I encountered didn't care about catering to tourists and the locals were generally uninterested or bored or sarcastic when I asked questions."

"I was also very disappointed with how friendly locals were - especially when going out to restaurants and for lunch - again, paying good money for terrible food and not one server could ever smile."

Other unappealing aspects mentioned by visitors include: price of goods and services (high cost, imported), attractions and activities (limited range), poor weather (humidity, heat), safety and

poverty (petty theft, poverty of locals, viruses), flight/airline-related issues (flight arrival and departure times), becoming too commercialised/touristy (foreign developments, arrogant tourists), and rental cars, scooters and bikes (quality, cost and service).

Comments included:

"The price of better quality accommodation and the extremely high price to travel to other islands. We would have loved to visit Aitutaki but was well out of our budget!"

"We really enjoyed a popular food market in Muri. We think that it could be better to have more things like that market and less "touristic" performances and shows and expensive bars."

"Unless you were staying at the beach resort, the lack of water sports and toys such as kayaks, boards and sailing cats was disappointing."

"The roads for cycling weren't great. The bikes we rented were poorly serviced."

"The increase in petty theft and break ins - once you could visit there and leave your unit unlocked. Needs to be addressed."

"Although I was not robbed, I met someone who was. Also, as I read the on-line Cook Islands News, I noticed there have been a lot of thefts of tourists. I have loved my stay and would like to come back, but I am a bit worried about this."

"The segregation between the majority of Cook Islands people, who are clearly quite poor, and those who are travelling to the island as tourists. I found it concerning how little the Island people were paid in contrast to how much people were being charged in some of the big resorts. Surely, a higher wage should be paid to local people given the high cost of living on the Island."

"Overnight flight from Sydney to Rarotonga was horrendous. If we had known that we would be waiting from 5:30am-8am in an open shed then we would have chosen a different itinerary."

"I was concerned with the amount of investment from China in the Cook Island community and its infrastructure. Such an investment (e.g. the building of a new police station) will want significant returns such as an increase in fishing rights, land ownership. I would hate for overseas investment to be seen as a short term fix rather than considering the effects of such investment to the Cook Islands way of life in the long term."

"That it's starting to look like a city in AUS or NZ, it's good to expand but keep the natural look of the Cooks. We bring people to the Cooks for the Cooks not to see a plastic version of another country."

"Too many expatriates owned the businesses. We had to do some research to support islander owned business."

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 (44%) of respondents said 'yes'. Suggestions mentioned by respondents focussed on public services and infrastructure (20%), entertainment, activities and transport (14%), quality and cost of food and beverages (13%), environment/safety/animal care (12%), flight schedules in and out of Cook Islands (9%), value for money in accommodation (9%), visitors regretting they did not stay longer (15%), weather (9%), friendliness of locals and service levels (9%). Comments on these themes included:

"I find the hotels quite expensive , especially the Rarotongan which really is in need of repair. Overall everyone was friendly and we had an amazing time."

"Sub standard rental car....most things were broken, i.e. seat belts. Scooter hire was fine but having to obtain a scooter licence is a tourist rip off!"

"If someone has a driver's license, even if in their home country, I don't feel they need to go purchase a drivers license. Seemed like a waste of time."

"A few more options for eating out. This isn't usually a problem when visiting at other times of the year. Also, better specials from Air NZ would have helped. It seems that the prices are hiked up over the Christmas period. We spent over \$1200 per person in flights alone. For \$1399 return, we could have gone to Hawaii!"

"Better food and beverage. Nothing really catering for high end tourists prepared to spend. Although the people were lovely, they are lacking in hospitality skills."

"If the international flights were more frequent and prices for changing flights I would have stayed longer for volunteer work and to spend time with those I visited."

"We planned to visit the outer islands but due to cost and timings couldn't."

"The garbage burning was very unexpected and bothersome."

"The authorities do need to address the dog issue which is becoming a big problem."

"Airport departure delayed by several hours due to computer problem. No information or compensation was provided during this time, well after 2pm by the time we departed."

"Airport could have been improved by a drinking water fountain in the departure area. Having emptied drink bottles to pass through security screening I was then left without drinking water for my two pre-schoolers while waiting for a delayed flight."

"Clearer information on the bus timetable about the midday break on the weekend..."

"Ensure website links to tourist attractions/facilities advertised on the Cook Islands tourism pages actually work, as we used this to do much research before returning to the islands."

"More information/signage on places of interest. For example, black rock beach will be easier to locate with signage and parking area. Also Muri Beach, will also be helpful with signage. I really don't know where to park the vehicle, whether the area is public area or private property."

“We would have wanted to visit Atiu also, if we would have known better, shorten the stay at Rarotonga to add another island. But we just didn't know enough at time of booking.”

“I had to wait several days before being able to purchase a local Telecom SIM card for my phone. Internet and phone costs are very expensive.”

Reasons to return to the Cook Islands and recommend to others

The majority of visitors (95%) 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 overall great holiday destination, the unspoiled natural environment and the welcoming and friendly local people. These four themes cover the major part of the responses.

Forty-four percent of those surveyed mentioned the relaxed and laid-back atmosphere on 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 ‘relaxing’. Visitors used key words such as ‘quiet’, ‘unwind’, ‘not crowded’, ‘relaxing’, ‘slow’, ‘no rush’ and ‘tranquillity’– indicating the emphasis they place on the islands as a place to completely relax. Comments included:

“We love the quiet, peaceful, and slow life on Raro, and always appreciated the welcome of the local people.

“...amazing relaxing holiday and friendly atmosphere”

“As a place to relax the Cooks are supreme. No TV, only local newspapers. You can switch off from the world”

“Because I love the place and it truly feels like a place that I can rest and rejuvenate”

“Best place in the world to relax and to slow down, takes the stress out of life that has managed to accumulate over the year”

The unspoiled warm environment and natural beauty of the Cook Islands was noted by 32% of the visitors as a significant factor in leading people to want to return. The respondents enjoyed the beautiful unspoilt scenery, the clean lagoons, the gorgeous beaches and the warm climate. Comments included:

“It is a wonderful relaxing place, beautiful scenery, wonderful sunny days, and gorgeous beaches”

“A magical destination, so easy to get to and to really relax in. Nothing was a problem, the people were so friendly, the climate warm, the scenery stunningly beautiful”

“Beautiful coral reef and lagoons for snorkelling. Deserted beaches. Friendly cook Islanders”

Those who stated that they had an overall great experience (30%) mentioned that their trip to the Cook Islands was ‘fantastic’ or ‘amazing’ or the ‘best holiday ever’, and that they ‘loved it’ and that

the islands are *'like home'* and *'a paradise'*. Respondents also mentioned that they would *'can't wait to return'*, are *'already booked for the next year'* or they would *'definitely return'*. Comments here included:

"It was the most beautiful and relaxing place I have ever visited, so I have promised myself to go back"

"Had a wonderful time and the trip exceeded all my expectations"

"We love everything about the whole island chain"

Just under one quarter of the visitors (22%) identified the friendly, helpful and welcoming local people as a significant feature that encourages them to return to the Cook Islands. Respondents commented:

"Loved the easy relaxed rhythm of life, beauty of the island, and friendliness of people"

"Because I had an amazing time and the people where all amazing!!"

Those respondents (n=40) who said they would not be returning to the Cook Islands, commented on the high cost of travel and accommodation, the poor service standards and the distance. The majority preferred to visit other places around the world (n=23). Comments here include:

"...too many other places to see and do that we have no experienced"

"Probably not due to expense and distance"

The majority (95%) of the visitors said they would like to return to the Cook Islands, 81% of the visitors mentioned that they would like to include the outer islands in their next visit. Most (66%) 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 14% of visitors stated that they were *'not sure'* of which islands to include, and 8% 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 (6%) or the Southern Group (3%). *'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 (99%) said that they would recommend the destination to their family and friends. Almost half (44%) of visitors stated they would recommend the Cook Islands because of the atmosphere; this was again described as *'relaxing'* and *'peaceful'*. Respondents felt that the Cook Islands was a great place to chill out, recharge and *'just be yourself'* and therefore thought it would be a good holiday destination for those who could do with some *'island time'* away from their busy lifestyle.

Thirty-nine 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 the unspoilt nature of the place. Almost a quarter (23%) of the visitors mentioned the *'wonderful, friendly local people'* as a recommendation of the Cook Islands. Thirty percent of the respondents stated the Cooks to be simply *'beautiful'*, *'amazing'* and *'awesome'*

describing it as *'a perfect holiday destination'* which is *'truly a paradise'*. Other themes that were mentioned included the attractions and activities available (9%), the convenience of the islands as a destination (7%), affordability of the holiday (7%), the islands being family friendly and safe (7%), already have recommended to others (5%), the ease of New Zealand currency and language (4%), food and beverage (4%), culture and laid-back lifestyle (3%) and the accommodation and service (3%).

Comments included:

"A beautiful cultural experience with friendly people and gorgeous safe beaches and activities to please everyone"

"A nice inexpensive holiday that allows you to experience island life without having to go great distances"

"...easy to get around, some great restaurants, safe swimming, boutique accommodation, not too busy"

"It is a great family destination. Safe and friendly"

"Lovely relaxing place that uses NZ currency"

Only 1% of visitors (n=11) would not recommend the Cook Islands to others based on the overall expenses and dissatisfaction with service and attitude.

Final observations

This report shows that the Cook Islands tourism industry generally performed well during the January - March 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.

One other area worthy of mention relates to petty theft and other visitor related crime. While feedback relating to such incidents is not common it does appear to be on something of an upward trajectory. Even if the visitors affected are small in number the impact on reputation can be considerable.

Visitor spend prior to arrival in the Cook Islands has increased slightly from the 2012-2013 annual average (\$2,023 per person up from \$2,012), and spend on the island (per person per day) has dropped from \$115 (2012-2013 average) to \$108 (Jan-Mar 2013).

Overall the Cook Islands sector is performing well, with visitors generally happy with their experience and very willing to recommend the destination, nevertheless it remains important to look at ways to increase visitor yield in a sustainable manner , especially through the growth and development of 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.

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