

Cook Islands Visitor Survey Results

July - September 2013

Prepared for Cook Islands Tourism Corporation

by

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Executive Summary

This report focuses on the characteristics, expectations and expenditure patterns of tourists who visit the Cook Islands. The data presented is drawn from an online departure survey. The survey period covered in this report is 1 July to 30 September 2013. There were 1178 individual respondents to the survey - representing a total of 2563 adults and an additional 375 children (this equates to 8% of all visitors during the period – based on the latest 2012 visitor arrival data for the July-September 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 (\$2,026 per person up from \$2,012), and spend on the island (per person per day) has dropped slightly from \$126 (2012-2013 average) to \$102 (Jul-Sep 2013). The majority (77%) of visitors surveyed come from New Zealand, 14% come from Australia. Visitors are well educated (69% of visitors have some form of tertiary education) and have a higher than average annual NZ household income (45% earn over NZ\$100,000 per year). Nearly half (46%) of the visitors travel with just one companion. Solo travellers are relatively rare (4%).

Nearly two-thirds of the visitors surveyed (61%) are on their first visit to the Cook Islands, a further 26% have visited once or twice before. The main purpose of visit is holiday making (81%). The average length of stay in the Cook Islands is 8.3 nights. The majority of the visitors (96%) stay either one or two weeks. Most (99%) of the visitors surveyed visit Rarotonga, 19% visit Aitutaki, only 2% visit another island.

While in the Cook Islands, the total local spend per visitor per day is \$102 (compared to an annual average of \$126 for the previous year), and the average local spend per visitor during the whole trip is \$846. If the prepaid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,656 to the Cook Islands economy (or approximately \$200 per day). The decline in 'in-country' spend from a year earlier may reflect, pricing shifts and also changes in visitor behaviour. However, the 'in-country' spend is consistent with spend in the previous quarter (\$100 for January-March 2013).

Visitor satisfaction with activities and services is high. Land-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 considered to be the unspoilt environment, the friendly local people and the peacefulness of the destination. Some visitors also mentioned activities and entertainment, the quality and availability of food and beverage, the high level of service and the convenience of travelling to and within the Cook Islands. The least appealing elements of the Cook Islands experience are considered to be the quality and cost of public services, facilities and infrastructure, the numerous stray dogs and the poor quality and value for money of tourism services.

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 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 July to September 2013 period. Over this three month period, 5238 visitors were contacted by email to take part in the survey, and 1178 responses were received: a conversion rate of 22%. These responses cover a total of 2563 adults and 375 children. The conversion rate and number of responses for this period are lower than for the 2012-2013 annual average (33%).

The data presented detailed information on:

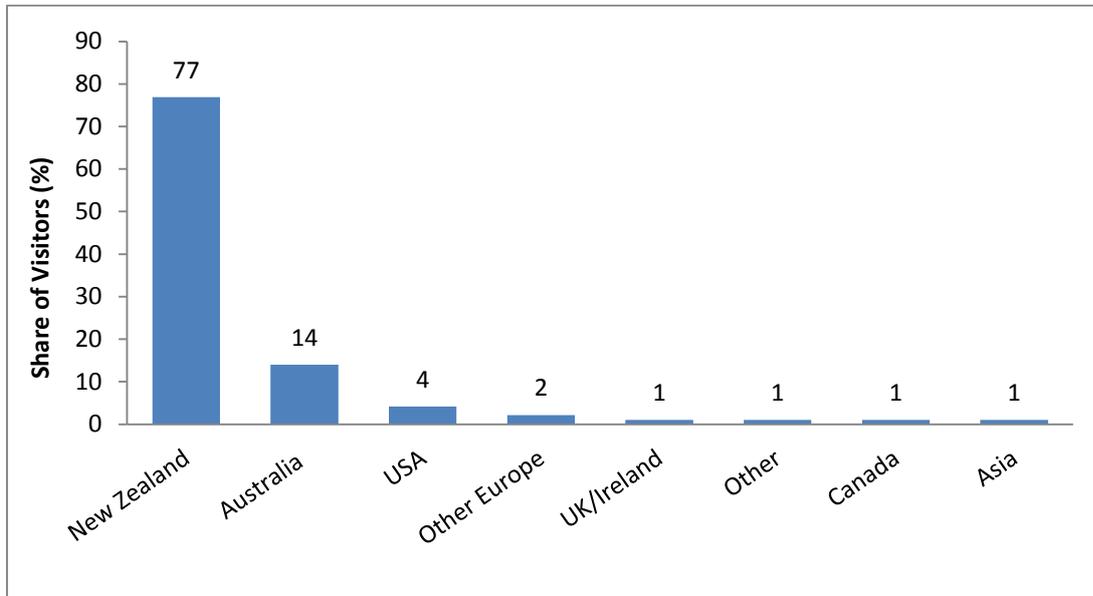
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook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

Where there are significant and notable variations from the findings of the 2012-2013 annual average some comparison is made, otherwise only data for July - September 2013 is discussed. Comparisons across the four quarters will be provided in the annual report for this series.

Visitor Characteristics

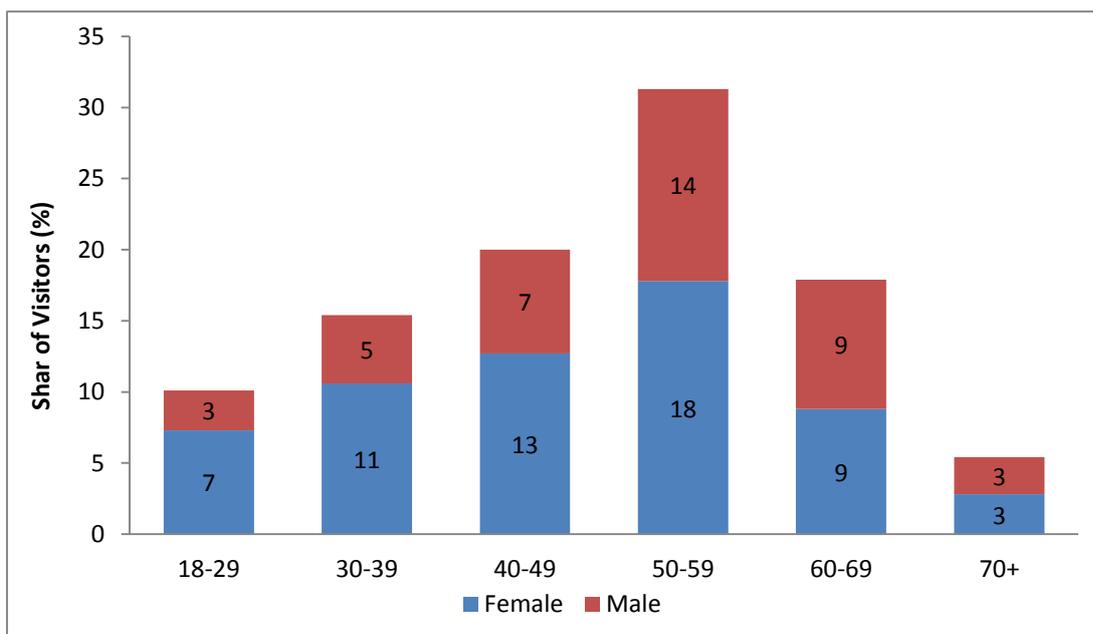
The majority of the visitors surveyed (77%) come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 14% of respondents. USA, Europe, Great Britain, the USA, Canada and Asia represent the other key source markets.

Figure 1: Country of Origin (n=1173)



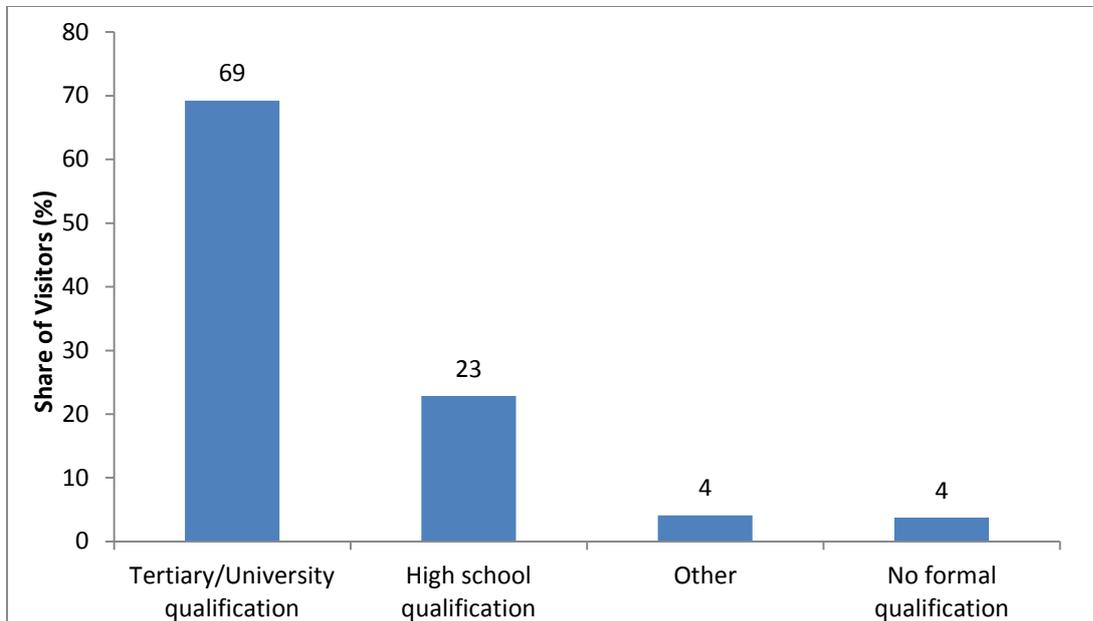
More women (60%) than men (40%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented, followed by the 40 to 49 and 60 to 69 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=1135)



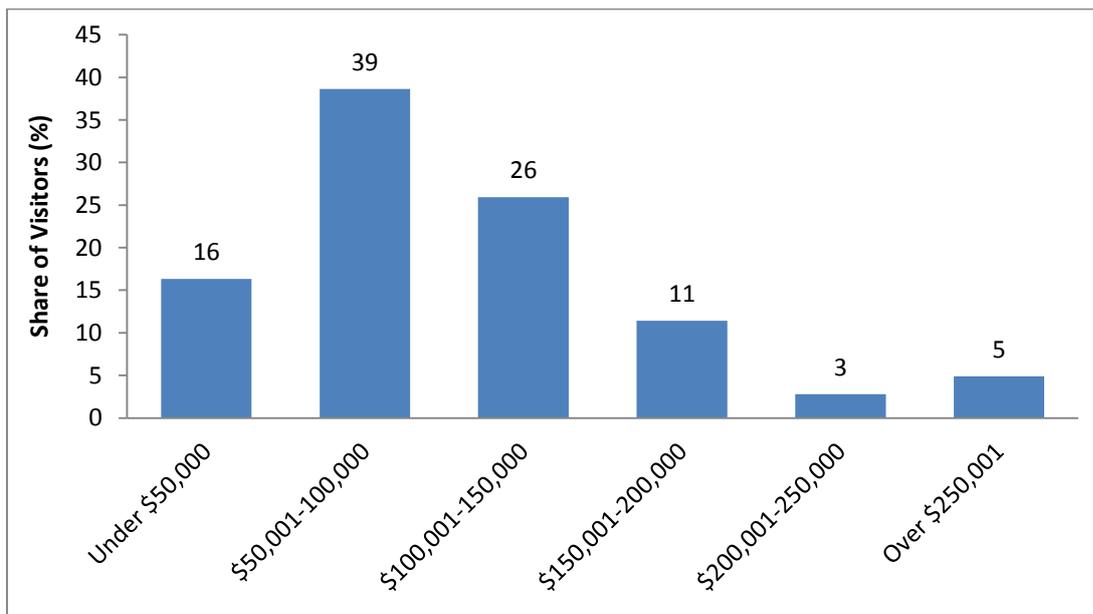
Visitors are well educated. More than two-thirds (69%) of the visitors surveyed had some form of tertiary qualification (Figure 3), a further 23% completed education at high school.

Figure 3: Highest Qualification (n=1142)



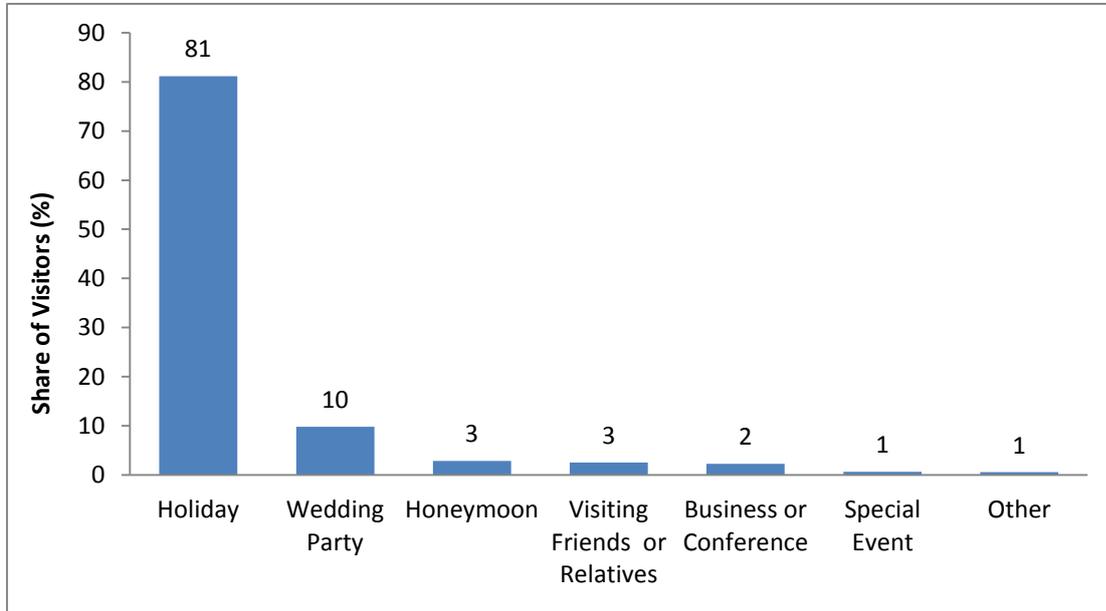
A significant group of visitors (39%) have an annual household income of between NZ\$50,001 and \$100,000. A further 26% earn between NZ\$100,001 and NZ\$150,000 (Figure 4). Nearly one fifth (19%) of the respondents have a household income of over NZ\$150,000 per year. Visitors to the Cook Islands earn significantly more money than the average New Zealander or Australian (latest national statistics show a mean New Zealand household income of NZ\$81,067).

Figure 4: Annual Household Income in NZD (n=999)



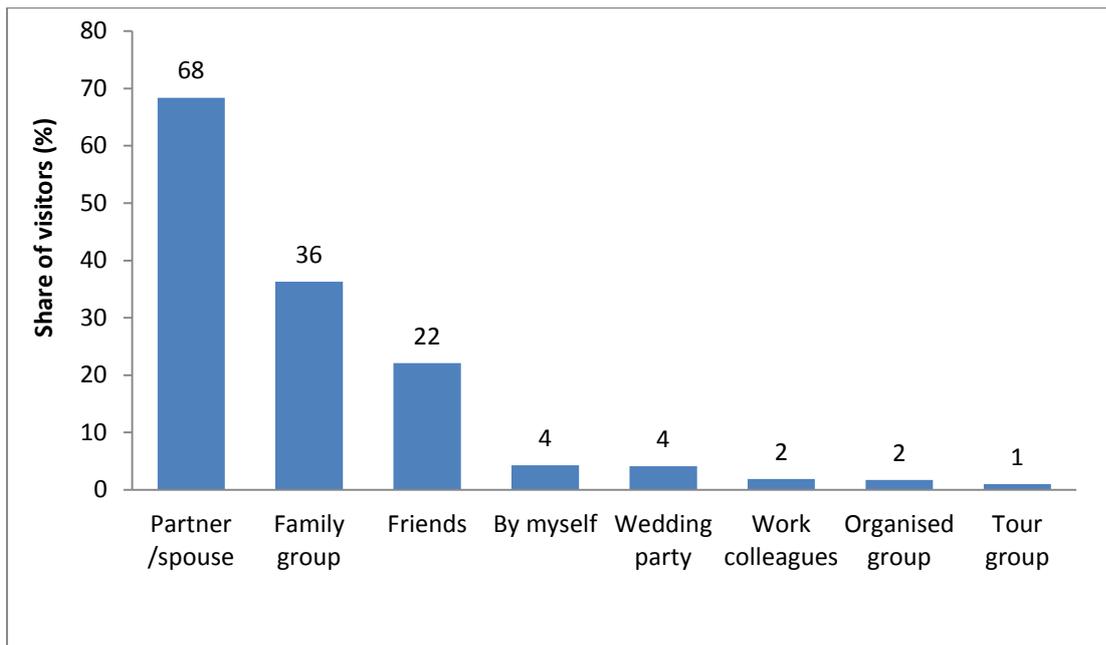
The vast majority of visitors surveyed from July to September 2013 come to the Cook Islands for a holiday (81%), with the second major purpose of visit being to attend a wedding (10%). Three percent of respondents came for a honeymoon and another 3% visited friends/relatives. Just 2% came for business/conference travel (Figure 5).

Figure 5: Main Purpose of Visit (n=1178)



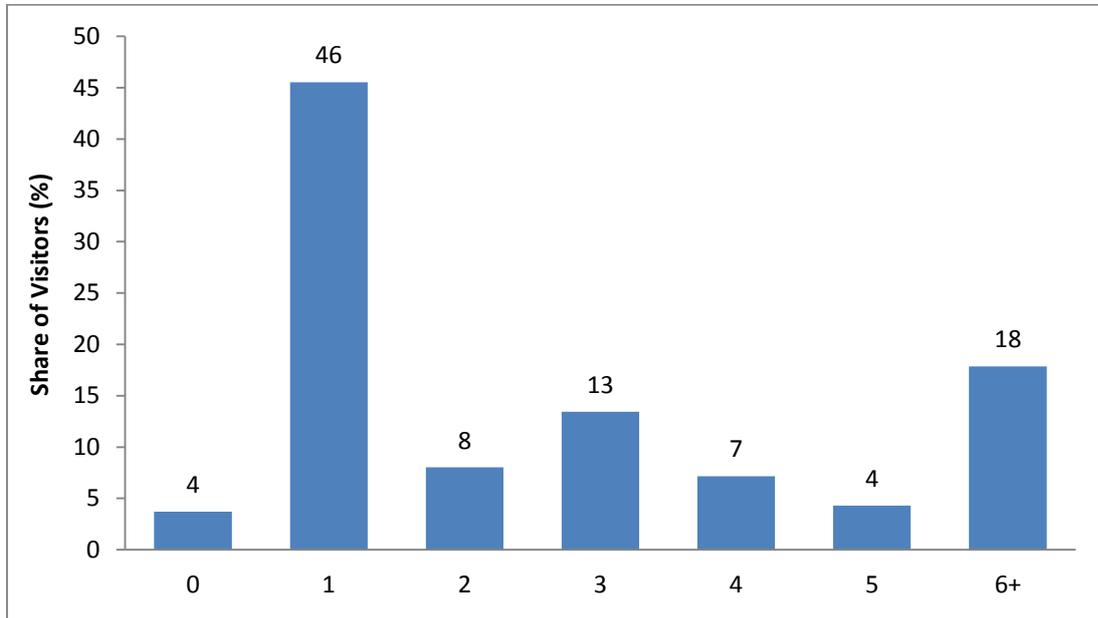
Over two thirds (68%) of the visitors travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (36%) or friends (22%). Those travelling alone, with a wedding party, with colleagues or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with whom? (n=1175)



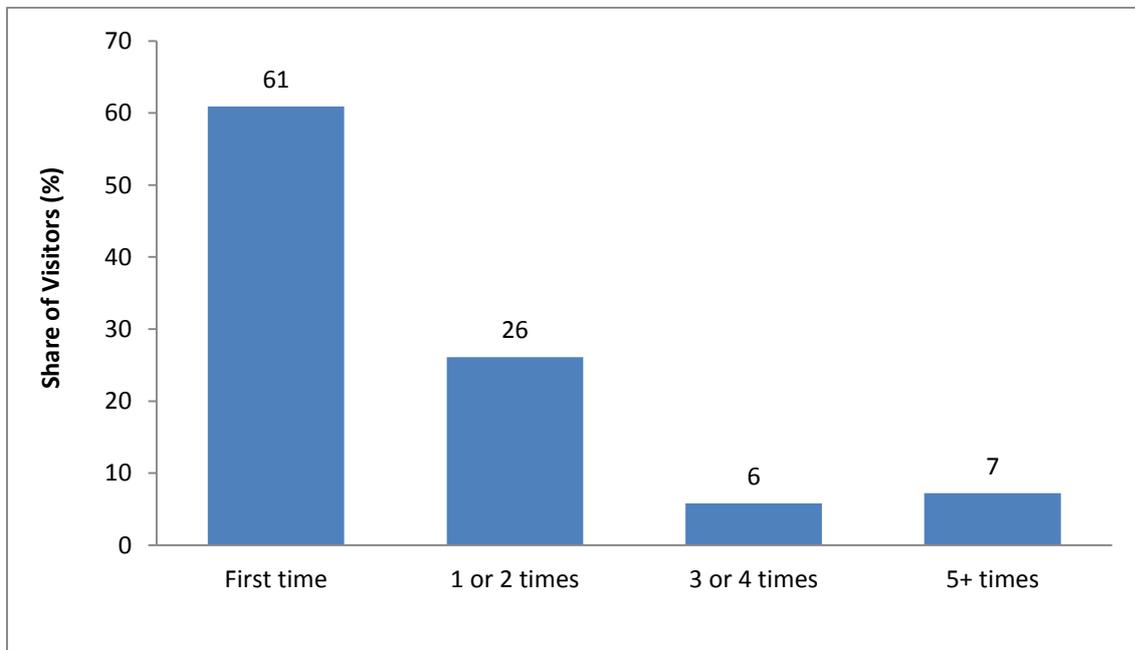
Most visitors (46%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=1160)



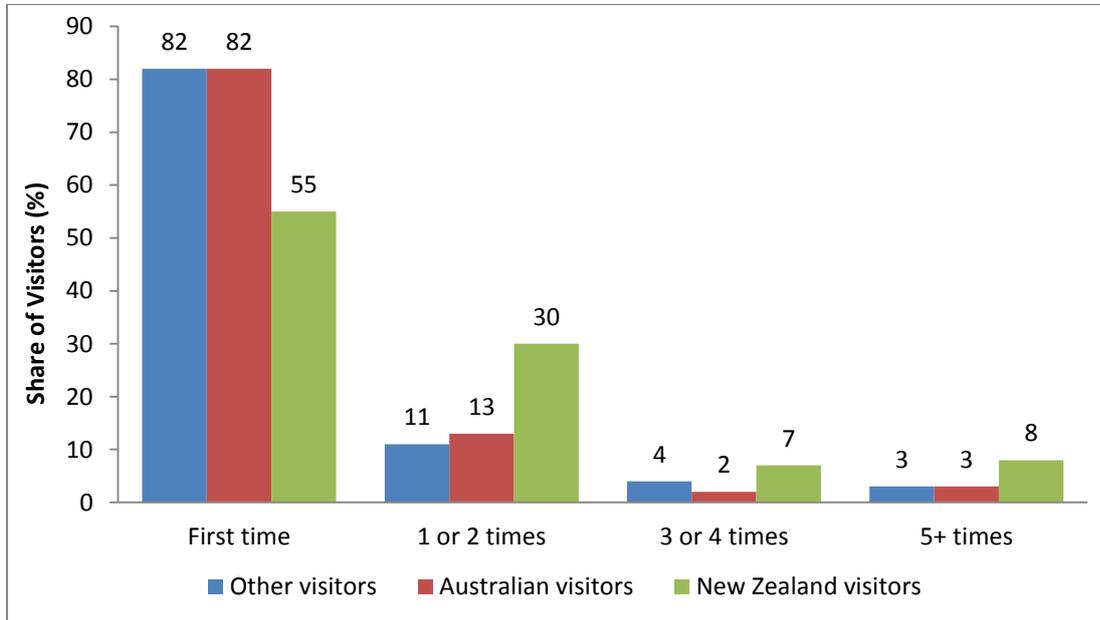
Most visitors (61%) are on their first visit to the Cook Islands. A further 26% have been to the Cook Islands once or twice before. A smaller group (13%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=1138)



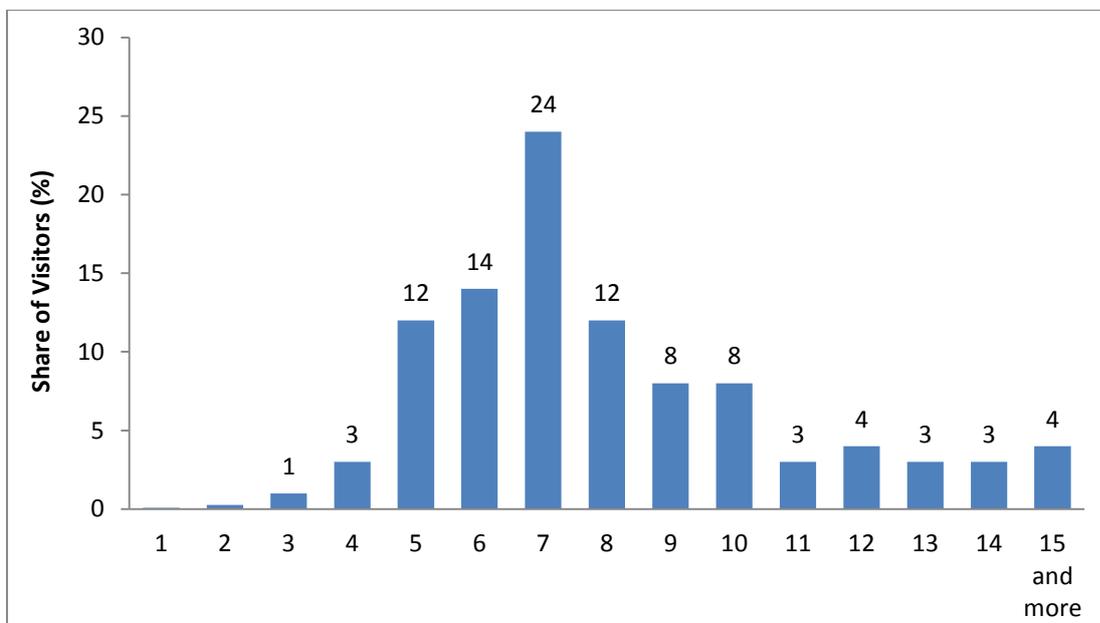
New Zealand visitors are more likely to be repeat visitors than those from other source markets (Figure 9). Thirty percent of New Zealanders have visited once or twice before compared to only 13% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=1136)



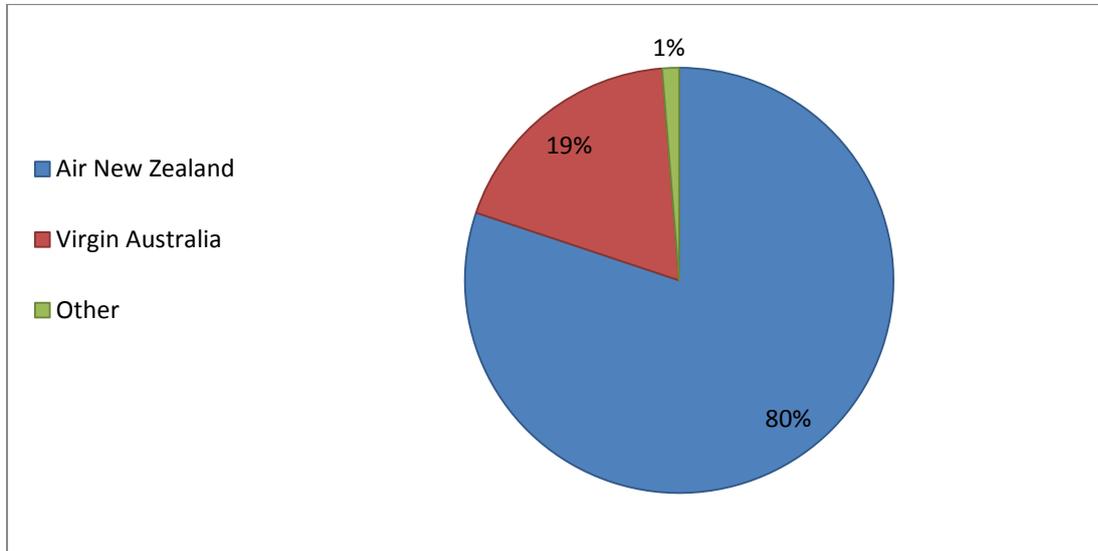
The average length of stay in the Cook Islands is 8.3 nights with 83% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=1167) mean = 8.3 nights



Most visitors (80%) travel to/from the Cook Islands with Air New Zealand, a further 19% fly with Virgin Australia (Figure 11). Most passengers on those airlines fly out of Auckland or transit through Auckland. Fewer than 1% of visitors travel with Air Tahiti Nui, or private vessel.

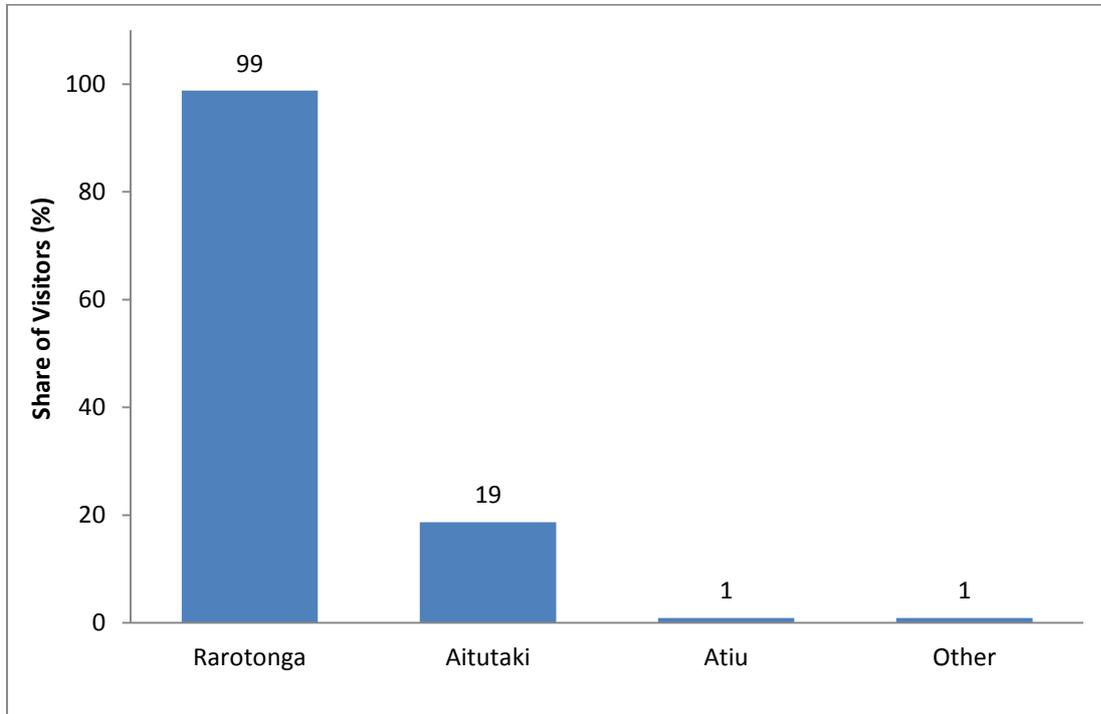
Figure 11: Airline used (n=1167)



For 92% of visitors, the Cook Islands is the only destination on their trip. For 8% of visitors the Cook Islands is part of a larger journey such as an around-the-world trip. When this group were asked about other destinations that were included on their journey 17 different places were mentioned. The top destination mentioned was New Zealand (46%), second was USA (mentioned by 24% of respondents). Just under a quarter of visitors (22%) stated Australia was part of their larger trip and 21% mentioned French Polynesia. Other destinations each mentioned by 4-6% of respondents included Hong Kong, other Pacific Islands, Thailand, UK, Singapore, Canada, China and Hawaii. The rest of the destinations were mentioned by only 1 or 2 visitors each and included Africa, Europe, South Korea and Malaysia.

The majority (99%) of visitors to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (19%) (Figure 12). The other islands receive very few visitors.

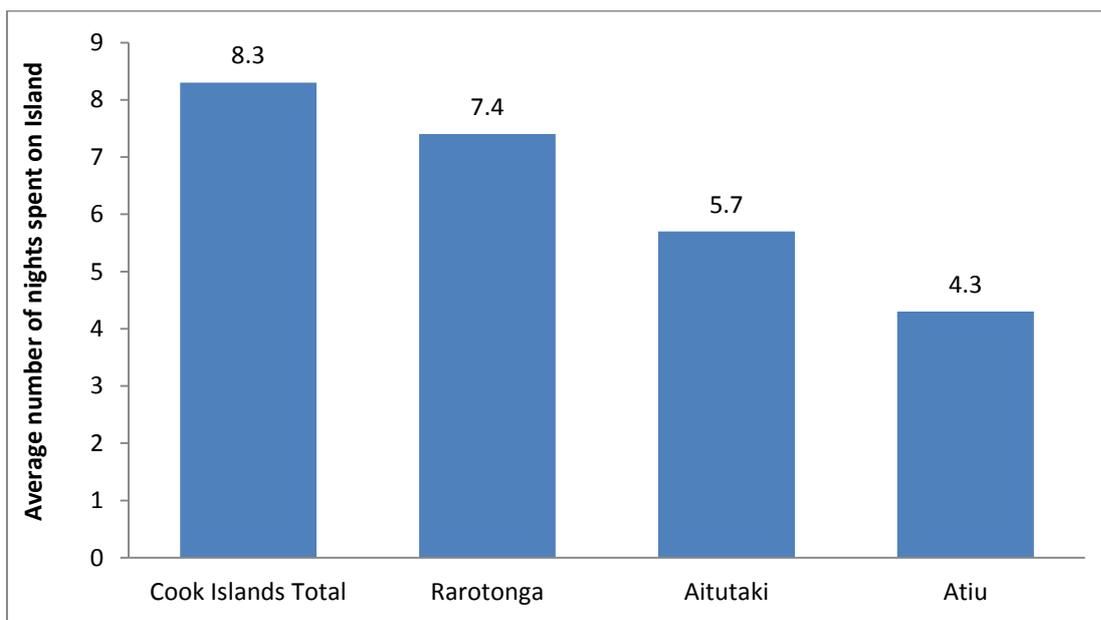
Figure 12: Visited Islands (n=1177)



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

The average length of stay on Rarotonga is 8.3 nights (Figure 13). For the visitors that went to Aitutaki, the average number of nights spent on the island is 7.4. The average length of stay on Atiu is 5.7 nights.

Figure 13: Average length of stay in the Cook Islands (n=1170)

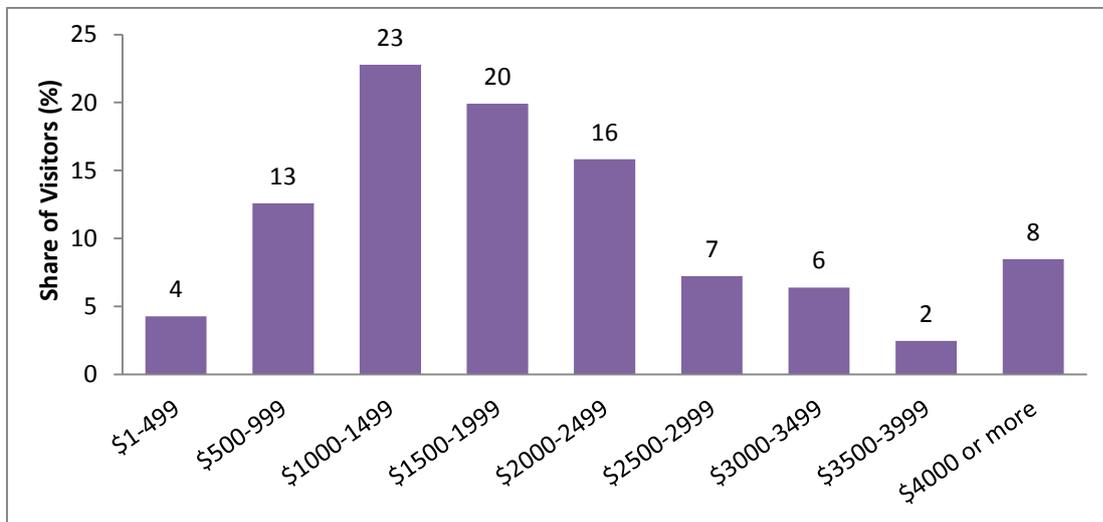


Visitor Expenditure

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: 2938 people comprising 2563 adults and 375 children.

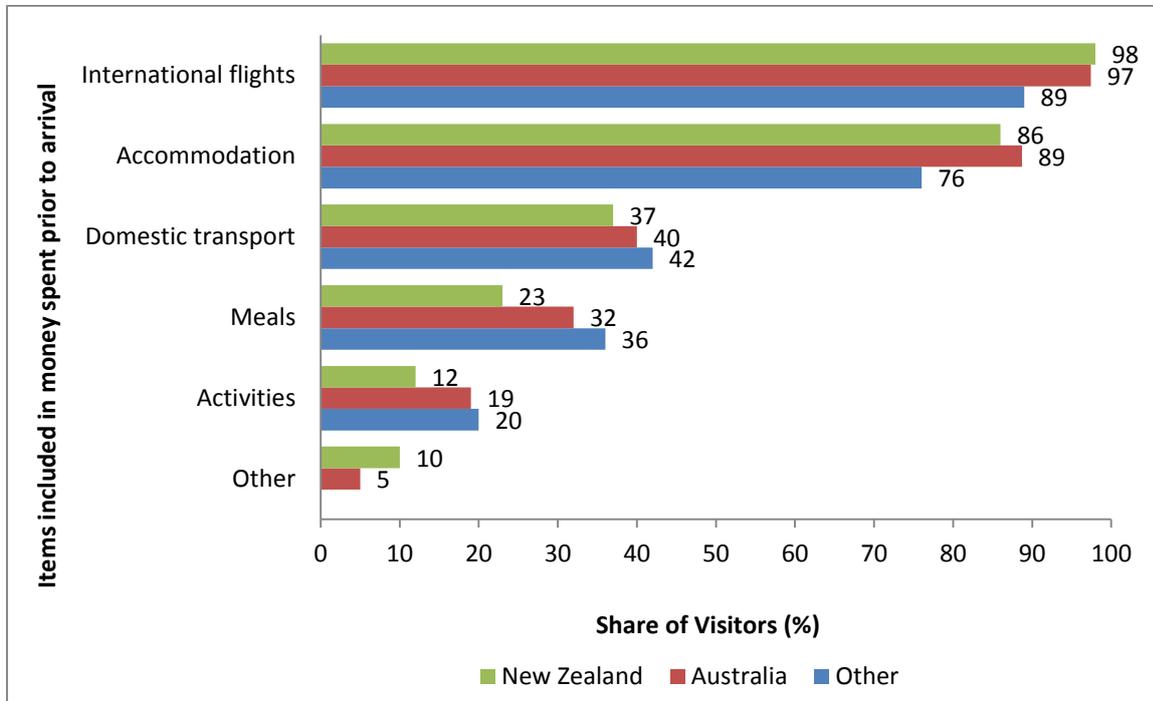
On average, visitors to the Cook Islands spend NZ\$2,026 per person prior to arrival. Most (59%) of the visitors spend between \$1000 and \$2500 dollars. These figures remain very consistent with the data from the previous year (average spend of NZ\$2,012 for the 2012-2013 period) (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=1049)



Spending prior to arrival usually includes accommodation: in 86% of the cases for New Zealand, 89% for Australian visitors, and for 76% 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=1088)



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 \$98 and for the average visit is \$810.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$102 (Table 1). This figure is very similar to the previous quarter (\$100 for January-March) but is lower than the overall spend figure for 2012-2013 (\$126). Most money spent locally is on restaurants, cafes and bars (31%), accommodation (26%), shopping (12%), and vehicle rental, activities and groceries (each 7%). By multiplying daily spend by the average stay (8.3 nights) it is clear that each visitor spends on average \$846. The total figure of what is spent locally and what flows back to the Cook Islands from prepaid expenses is \$200 per visitor per day (\$102 plus \$98), or \$1,656 (\$846 + \$810) per total personal visit.

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

Expenditure Items	Overall n=1170	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	32	31
Accommodation	26	26
Shopping	13	12
Vehicle rental	8	7
Activities	7	7
Groceries	7	7
Domestic flights	3	3
Other	2	2
Petrol	2	2
Cruising	2	2
Public transportation	1	1
Total expenditure per person per day	\$102	100%

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

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

Expenditure Items	n=54	n=164	n=895	n=38
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	32	40	31	25
Accommodation	66	28	24	37
Shopping	19	17	11	17
Vehicle rental	8	9	8	4
Groceries	7	7	7	6
Activities	11	9	6	5
Domestic flights	5	5	2	7
Other	3	1	2	3
Petrol	2	2	2	1
Cruising	1	3	2	1
Public transportation	1	1	1	1
Total spend (NZ\$)	\$155	\$121	\$96	\$107

Australian spend for this quarter (\$121) was lower compared to the 2012-2013 average of \$137, and European visitor spend at \$107 per person per day was down from the average of 2012-2013 of \$118. USA/Canada spend continues to be the highest; at \$155 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 \$96 per visitor per day for the July to September 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). Two thirds (66%) of the visitors surveyed ranked their experience as 'very satisfied'. Very few visitors (2%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=1154)

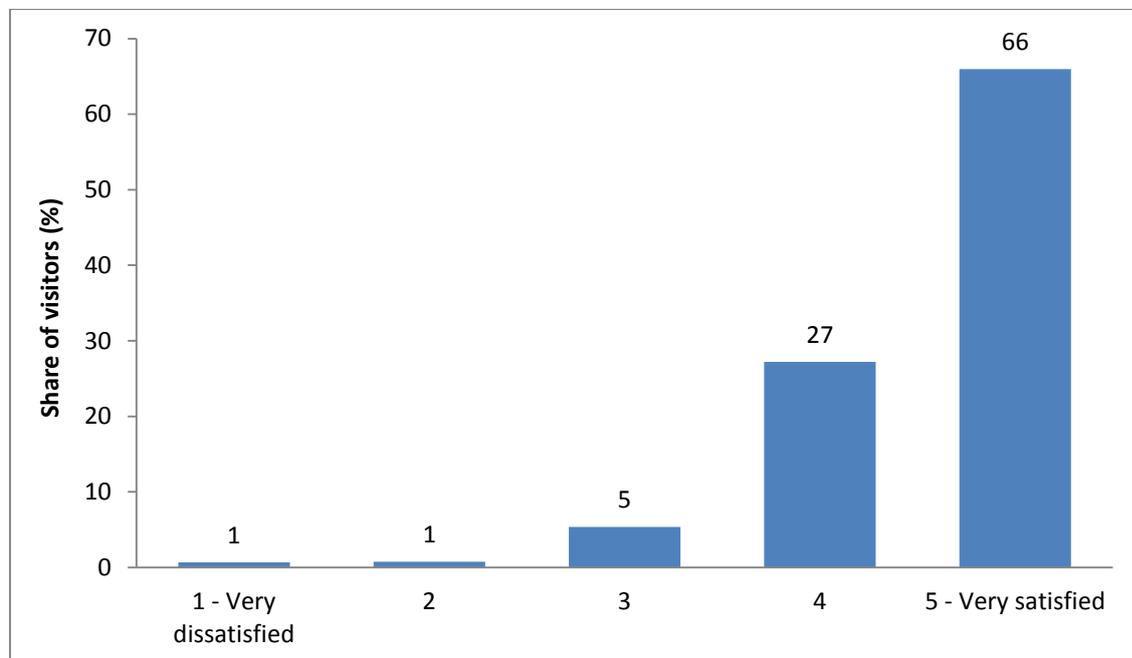


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (86%) visit a local market, and 71% 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 – with the exception of deep sea ‘3.9’ and bonefishing ‘3.8’). Cultural interaction activities rank highest (average satisfaction of 4.6) followed by water and land-based activities (both 4.4) and shopping (4.3). It should be noted that some activities e.g. bonefishing, kitesurfing, ocean cruise and Tumunu on Atiu have relatively low ‘n’ values.

Figure 17: Degree of participation in activities (n range=10-1145)

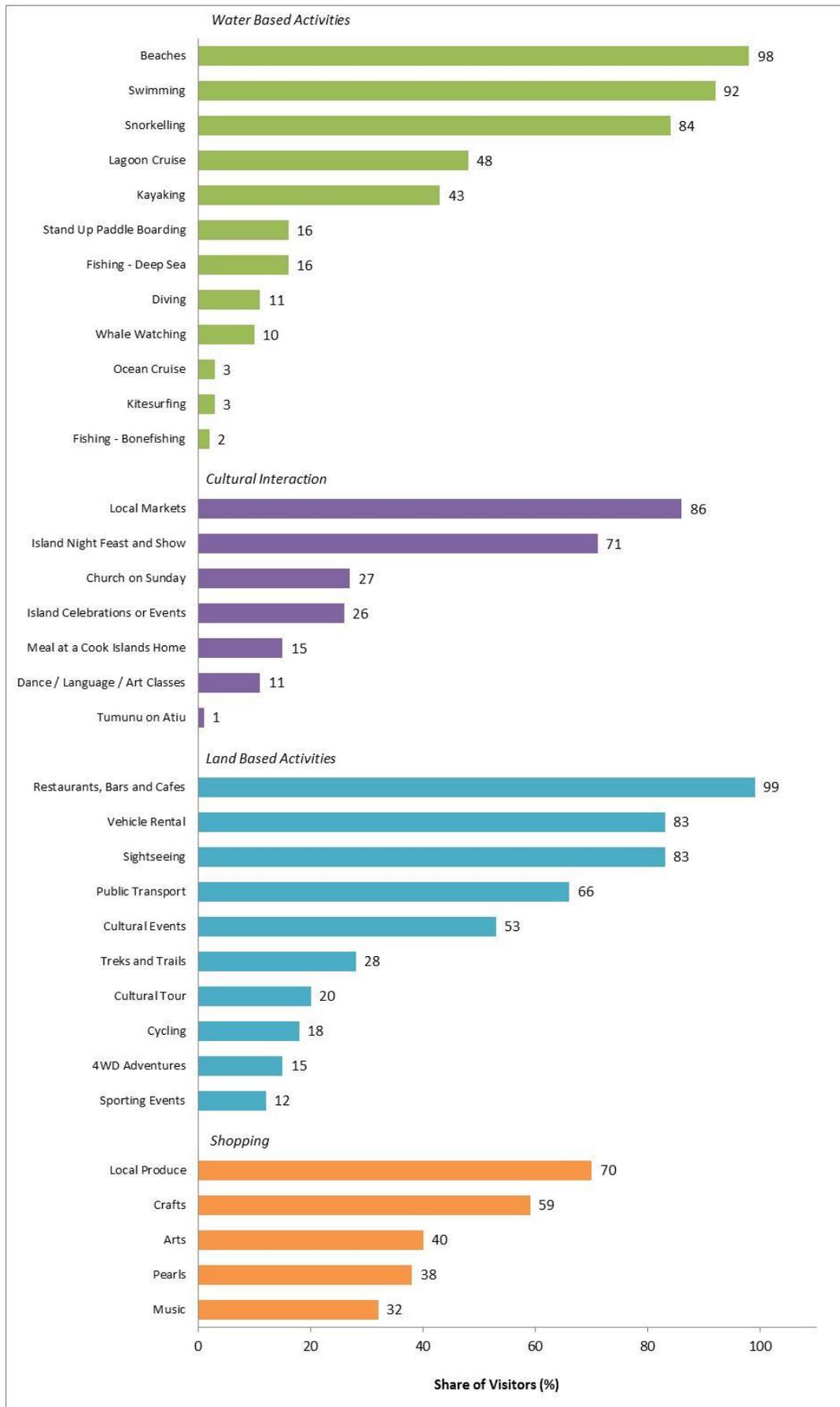
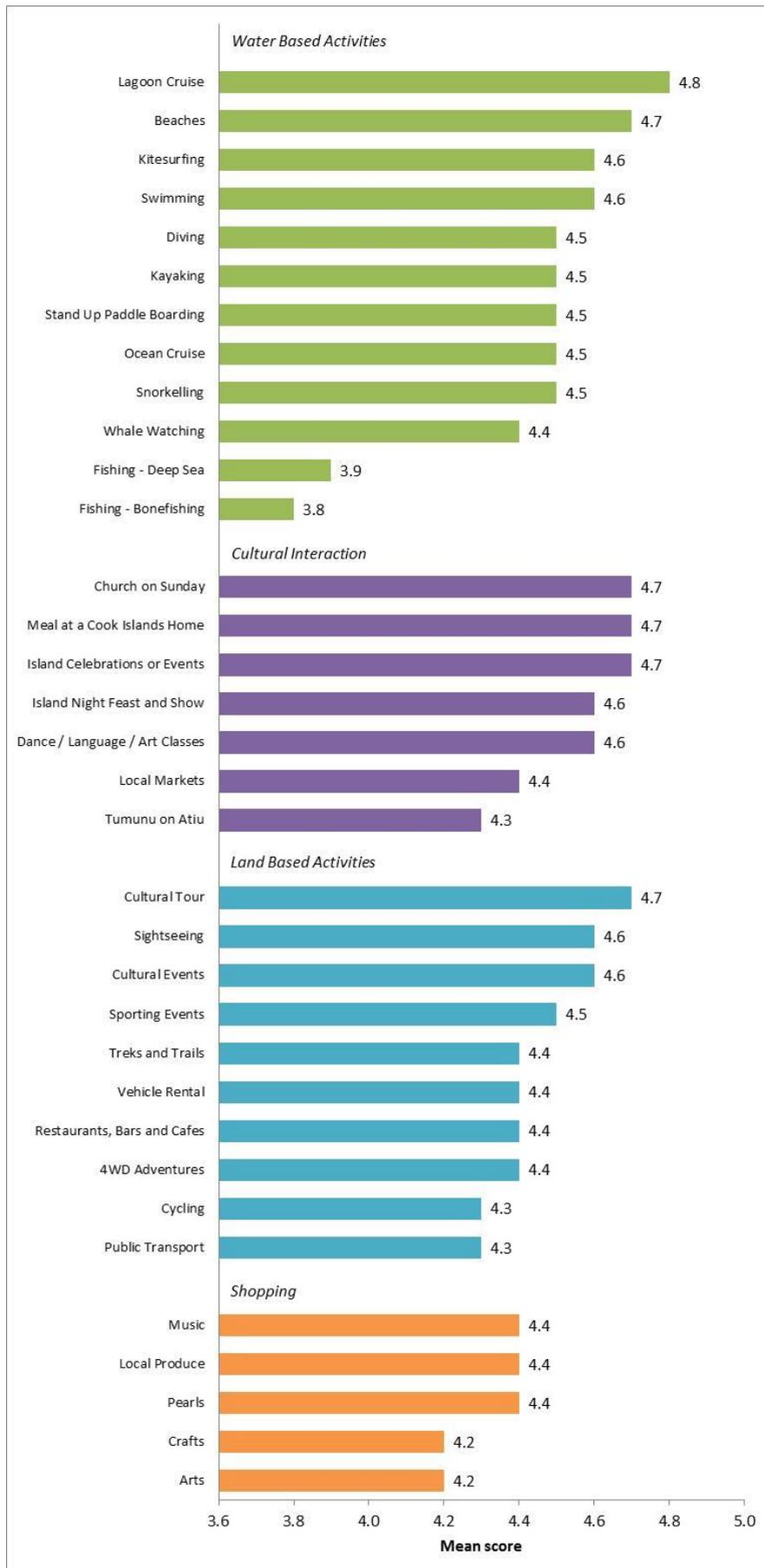
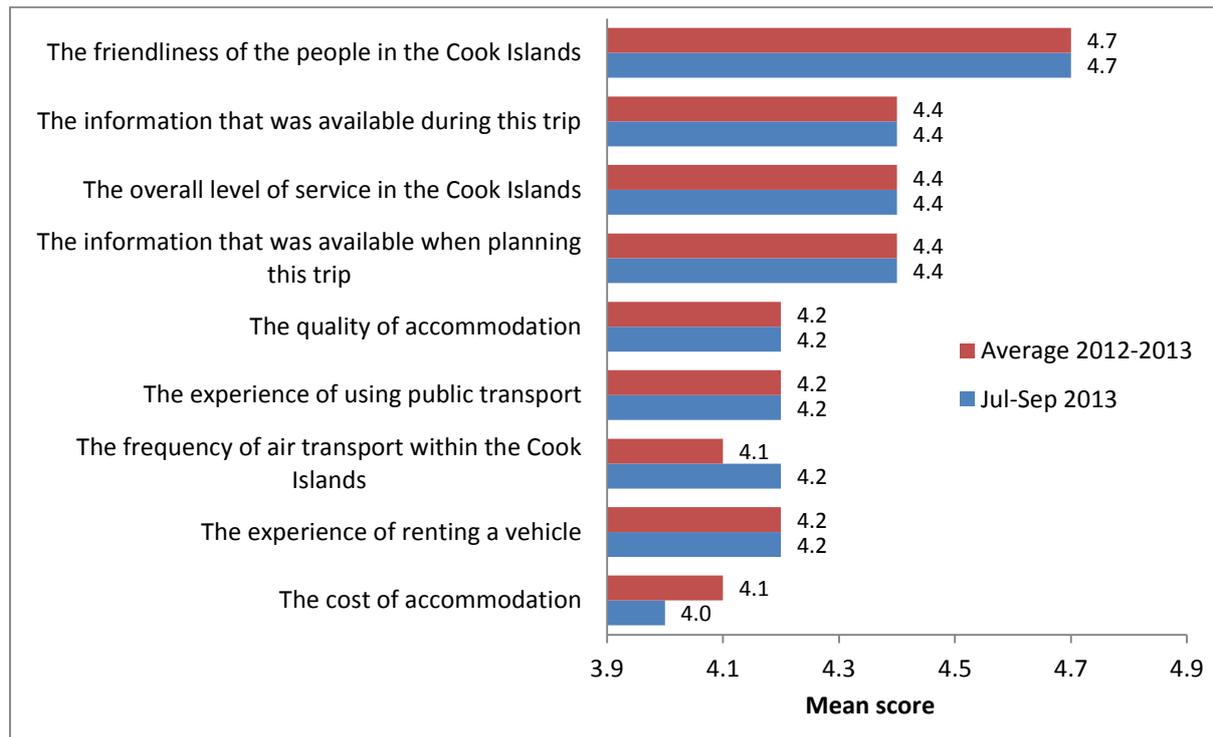


Figure 18: Degree of satisfaction in activities (mean score out of 5)



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 July to September 2013 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 the cost and quality of accommodation, car rental experiences and both air and local public transport. In no cases though do scores fall below 4 out of 5. There is a high degree of consistency in satisfaction scores across the two periods with only the frequency of domestic air transport and cost of accommodation showing a slight variation.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5) (n=1176)



Most appealing aspects of the Cook Islands

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

Table 3: Most appealing aspects of the Cook Islands (n=1116)

Themes	Share of respondents (%)
Environment	47%
Local people	43%
Atmosphere - peaceful and relaxing	32%
Activities, attractions and entertainment, events or weddings	21%
Food and beverage	11%
Level of service	10%
convenience of the Cook Islands as a destination	6%
Affordability and un-commercialised	5%
Overall good experience	5%
Accommodation	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 (47%) of the respondents considered the environment to be the most appealing aspect of their Cook Islands experience. Most comments here focused on the beauty and the cleanliness of beaches and lagoons, the beautiful views and scenery, good climate, and the warm and clean water. Several respondents also noted the good health of the friendly free-roaming animals (dogs, chickens).

Comments included:

"Perfect match with the postcards - beautiful beach, great accommodation."

"The lagoon at Aitutaki with its azure waters and uninhabited Islands was surreal. Such untouched beauty."

"The climate was a welcome relief from the southern winter"

"I had visited in the late 1970s and was quite appalled at the state of many of the animals in Rarotonga - so was thrilled to see such a mostly happy, healthy and de-sexed bunch of animals!!"

Local people

A Large group (43%) 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 on the friendliness 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 'pride'.

Comments included:

"The warm, open and honest friendliness of all local people we encountered"

"The friendliness and happy faces of the locals. Everywhere we went we found nothing to hard or out of their way to make us feel comfortable. We will holiday again here before thinking about Bali and Indonesia."

"Friendly people who treat you in a friendly but down-to-earth way. Cook Islands humour. Pride in Cook Islands culture."

Atmosphere

Just under a 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 described the islands as being 'remote' and 'a long way' from the hustle and bustle of everyday life.

Comments included:

"I felt very relaxed. Have often had problems sleeping over the years but not when I was on the Island :)"

"Ability to relax, the lack of excessive rules makes one feel like it is their home; the people are wonderful, it is very easy to get around -- OVERALL EASE."

"A blessing to get away from the tar seal, ATMs and see that people can be so happy away from the trappings of the modern world."

"I was very much in need of rest and relaxation. That's exactly what I got and I have no desire to go anywhere else now. The pace of life and the people contributed enormously to a wonderful time."

"The ease of everything and very safe fun and friendly. Love the place - 5th visit"

Activities, attractions and entertainment, events or weddings

Activities and entertainment were mentioned by 21% of respondents as the most appealing elements of their Cook Islands visit. Most comments in this category focus on the water-based activities such as lagoon cruises, swimming, diving and snorkelling. Other land-based activities that were mentioned included travelling around the island by scooter, walking, shopping, cultural tours and events such as the Constitution Day celebrations and family weddings. Comments included:

"Best snorkelling in the world. We have tried Hawaii, Thailand, and the Great Barrier Reef. Rarotonga has great snorkelling and very easy access, without even having to get on a boat."

"A very safe place to take young children to be able to go swimming etc."

"Enjoying activities at our own pace. Freedom of being able to travel around independently. Not having to wear a helmet on the motor bike."

"I absolutely enjoyed watching the cultural events and how it is installed into the younger generation at such a young age."

Food and beverage

Eleven per cent of the respondents mentioned 'food and beverage', adding that they found these to be fresh and of high quality - especially seafood, tropical fruit and vegetables. Many visitors commented on the great availability of local food e.g. from the markets and also the good selection of quality restaurants.

Comments included:

"The food was fresh and delicious which was a bonus!"

"The food. Loved the papaya and fish."

"All the restaurants we ate at, the standard of food and service could not be faulted and we thought the pricing was value for money"

Level of Service

Ten 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, and the extraordinary service from the staff in the restaurants/bars/hotels and tour operations being helpful and going beyond expectations. Visitors also emphasised the lack of pressure to buy which made them feel comfortable. There were also a few comments on some very entertaining bus drivers. Comments included:

"The friendliness of the locals and the high standard of service where ever we went."

"The lovely happy people who were working hard to be hospitable & helpful to the tourists. No one was pushy."

"Friendly helpful people, reasonably prices. The hilarious bus driver who kept up a running commentary all about the Island as he drove us home."

"Being picked up by locals who had seen us waiting for a bus."

Convenience

Six percent of visitors commented on the convenience of the Cook Islands as a destination. In particular; they referred to the Cook Islands as being 'a short-flight away, that the islands are small and accessible and noted the ease of getting around. Many respondents also commented on the ease of using the New Zealand dollar and the English language.

Comments included:

"It is an easy island - size to get around easy. Use of \$NZ - easy."

"The way we could travel right round the island within 40 mins by scooter."

"No currency conversion or language barrier. Warm weather and warm people!"

Affordability and un-commercialised

Approximately 5% of respondents mentioned that the Cook Islands as being a place that is not over-commercialised or over developed and that it is affordable. Some visitors also emphasised the importance of preserving the destination from mass tourism development and westernisation in the future and keeping it attractive as a destination. Some repeat visitors positively noted that the Cook Islands are still the same and nothing has changed. Comments included:

"Besides its natural beauty, what appealed to us was the local feeling of the island, not being all giant impersonal resorts. Even though I was a tourist, I felt welcome to shop in the same places as locals and drive on the road, etc..."

"No McDonalds or other chains-please keep it that way."

"The island stays the same and hasn't become a flashy, touristy mecca."

Overall good experience

Another 5% of respondents decided not to focus on a specific appealing dimension of their trip to the Cook Islands and instead stated that their whole experience was a good one. Positive adjectives used to describe visitors' experience included *'fabulous'*, *'amazing'* and *'beautiful'* while others expressed their positive experience with *'just everything'*, *'love it'* or *'we'll be back'*. Comments included:

"Everything the island is amazing"

"The overall experience was one of pure joy."

"The weather was great and the people better. Our 15th year in a row. We'll be back"

"Love the people - friendly, helpful and good-humoured. Lovely accommodation, great food and weather. What is there not to like?"

Accommodation

Accommodation was mentioned by only a small proportion of respondents (3%) as being an appealing aspect of their visit. The key words used to relay the visitors' experience were *'fantastic'*, *'great'* and *'lovely'* referring to the quality of the offering, location and welcome from hosts.

Comments included:

"The best thing about our holiday was our hosts. They were so thoughtful, generous and helpful. We felt nothing was too much trouble. Their accommodation is superb."

"Living right on a private part of the lagoon"

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?” Most visitors did not respond – providing a clear sense of overall satisfaction. Just over a fifth (21%) of visitors took the trouble to note that they found nothing was ‘unappealing’ or that there was ‘nothing to complain about’, responding with comments such as “nothing at all, loved everything” and “wish we could have stayed longer”. There were, however, a number of areas that did attract comment (Table 4).

Table 4: Least appealing aspects of the Cook Islands (n=1030)

Themes	Share of respondents (%)
Public services and facilities	17%
Stray animals (dogs, roosters) and mosquitoes	13%
Food and beverage	12%
Price of goods and services	11%
Poor weather	10%
Accommodation	8%
Rubbish & natural environment care	8%
Flight-related issues	7%
Local people	4%
Rental cars/ scooters	4%
Attractions and activities	4%
Becoming too commercialised/touristy	3%
Safety & poverty	2%

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

Public services and facilities

Seventeen percent of survey respondents expressed their disappointment with public service, facilities and infrastructure in the Cook Islands. In particular complaints were made about the frequency of public transport, range and opening hours of retail shops, the state of roads and footpaths, having to buy or boil water, along with poor and expensive internet services. Several respondents here also mentioned their frustration with (as New Zealand citizens) having to obtain a Cook Island driver’s licence. Comments included:

“Bus service appeared to be sporadic. I waited for 30 minutes for a bus and eventually a local driving past stopped and offered me a lift into town.”

“Bumpy road!! Full of potholes.”

“NOT being fully informed that EVERYTHING (even in the main part of town) is closed on a Sunday except the odd tourist coffee shop”

“The internet is really, really slow and really really expensive for what you get.”

“The need to get a driver’s license each time we visit. It is clearly just a revenue gathering exercise, and very few countries require this. Tourists to NZ do not have to pay for a license each time. This is a significant annoyance!!”

Stray animals and mosquitoes

Thirteen percent of respondents commented that the stray dogs, noisy roosters and the mosquitoes and flies were an annoyance or a worry for them during their time spent on the island. Comments included:

"I was very sad to see the dogs in such large numbers just wandering around. I am not sure whether they were owned by anyone or just wild. I love dogs but I felt very sad about the condition of them."

"Roosters at 3am."

"Unfortunately for me, mosquitos!"

Food and beverage

A number of visitors (12%) commented on the cost, quality and availability of food and beverage in the Cook Islands. This included all options such as restaurants, resort dining and shops as well as restaurant services such as pickups.

"Where we stayed didn't have a restaurant, and there were only two options for us to walk to. We would probably stay closer to the main retail areas next time."

"We were let down by a restaurant with an arranged pick up and were left standing by the road for over an hour. No buses at that time of night in the right direction and we missed out on an evening meal."

"Very poor restaurant experience both food and service. Very expensive and not very fresh super market food."

"Most restaurants served imported food rather than using local ingredients. Hard to find authentic local food."

Price of goods and services

Some (11%) visitors made specific comments about the high prices of food and beverage, hotel accommodation and activities. Respondents mentioned that the Cook Islands was an expensive destination to visit, and did not always provide good value for money. Several respondents expressed dissatisfaction with the cost of internet services and the scooter/car licence costs, describing them as 'too expensive' and 'unnecessary'.

Comments included:

"Public internet and Rarotonga buses - the prices are outrageous."

"It's really expensive for what you get. The lower quality places to stay are really expensive for what you get and the high quality places are unbelievably expensive."

"Obtaining drivers licence every time and paying for first day licence as well. Paying about \$65 departure tax."

"The high cost of the majority of restaurants."

Poor weather

A number of visitors (10%) mentioned that the poor weather mainly due to strong winds, rain and cooler temperatures was the least attractive aspect of their visit to the Cook Islands. Although visitors were disappointed with the weather the majority understood and pointed out that this was unpredictable and there was not much that could be done about it. Comments included:

"Wrong time of year to visit.....weather wasn't as hot as we'd like it."

"Just the wind and nothing you can do about that!!!!"

"The easterly wind made snorkelling quite hard most of the days I was there."

Accommodation

Eight percent of visitors commented on the expense and quality of accommodation. Visitors surveyed mentioned that the cost of accommodation is expensive for what you get, that some accommodation places are run down and that in some places staff seem to take no interest in guests.

"A significant number of staff in the resort seemed bored with their work and tired of dealing with the guests...and repeated use of the term 'island time' to excuse sloppy service."

"Although our hotel hosts were nice people, we had rats in our room."

"The resort we stayed at is getting a bit tired , maintenance really needs to be keep up otherwise things start to look quite shabby."

"Service was not up to the price charged for accommodation, meals, or drinks at the resort."

Rubbish and natural environment care

Other visitors (8%) 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 waste/household rubbish lying around were often commented upon. The poor condition of the lagoons and beaches, degrading coral reefs and threatened marine life, also concerned a small group of visitors. Comments included:

"Where are all of the fish? Looks like hardly any of them there & lagoon in recovery mode, was disappointed with the fish life."

"Also I found it a bit irritating when out walking to be enveloped in a cloud of smoke - there seemed to always be someone burning rubbish at some point during the day."

"Diesel power plants to provide electricity to the islands. I think there should be a better "green way" to generate adequate power."

"I was a bit disappointed by the lack of sea life in the water. Corals are dying, only a handful of them left."

"Rubbish and debris long the coast. Spent one afternoon just picking up rubbish."

"Lots more rubbish than a few years ago - especially the broken glass on the beaches."

Flight-related issues (timing, delays, airport issues), local people (occasional lack of friendliness, poor service), rental cars and scooters (quality and cost), attractions and activities (limited range, bad experiences), commercialisation (too many tourists, becoming too commercialised) and safety (petty theft, dangerous driving) were other unappealing aspects mentioned by visitors. Although fewer visitors provided comments on these themes they believed that these issues contributed to a negative view of the Cook Islands and therefore worth mentioning.

Comments included:

"Arrival and flight departure times as these eat into your stay."

"Island time sometimes taken to extremes - 40 minutes for a drink - really?"

"When you have booked a car and prepaid for you shouldn't have to wait in line for ages behind others who have just drop in on off the street, you should be served first. That was a major inconvenience and annoyance!"

"Our fishing expedition was a complete rip off - 3 life jackets for 4 of us, three rods, claim of calm sea but as rough as - so could not fish in the right places....."

"Finding Burglars in our room at 4am."

"The Cooks are becoming very commercial. We have been travelling to the island for over 8 years and we have noticed a distinct change in attitude within the local community, especially this trip. There appears to be a wealth community growing, or more simply the gap between wealthy and non-wealthy people is increasing which appears to be dividing the people. Overseas influence is also very apparent, so please be careful Cooks. You have a wonderful place in your corner of the pacific; we come to you because of your friendly nature and absence of commercialism."

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 (47%) of respondents said 'yes'. Suggestions mentioned by respondents focussed on public services and infrastructure (21%), value for money in accommodation (15%), flight schedules in and out of Cook Islands (13%), weather (12%), visitors regretting they did not stay longer and perhaps will do so next time (11%), environment/safety/animal care (9%), friendliness of locals and service levels (9%), quality and cost of food and beverages (9%), entertainment and activities (6%), rental cars and scooters (4%) and the high prices (3%). Comments on these themes included:

"Lift customer service levels to justify price, Rarotonga is not a cheap holiday destination."

"Accommodation that provided what it advertised."

"Arriving in the day and leaving at a more sensible hour in the day/evening."

"The need to get a license. No test is undertaken so it is clearly not a safety issue."

"I should have stayed longer and visited other islands."

"A smile goes a long way! Tourists should be made to feel valued."

"Better roads and mute cockerels!"

"We would have loved to be able to meet a local family & enjoy a home cooked meal."

"More enthusiasm for the local fish and vegetables. NZ frozen produce is not a treat for us."

"More warning that theft is a problem and that money and belonging should be in a safe at the very least."

"Recycling of rubbish as this is a small ecosystem."

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. Most of the respondents thought the Cook Islands provided a wonderful experience due to the relaxed atmosphere on the islands, the overall beauty, the unspoiled natural environment and the welcoming and friendly local people. These four themes cover the major part of the responses.

Over 40% 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 mentioned that they found the Cook Islands the *'most relaxing place ever'* and *'a great place to chill'*. Comments included:

"It was the most relaxing and friendliest island we have been to."

"We absolutely loved it!!! It was relaxing and a great place to unwind."

"It's become one of our favourite places in the world - simple, beautiful, friendly, relaxed, everything a holiday should be."

The unspoiled warm environment and natural beauty of the Cook Islands was noted by just under one third of the visitors (31%) as a significant factor in leading people to want to return. The respondents enjoyed the beautiful scenery, the lovely lagoons and the white sandy beaches. Comments included:

"It was beautiful, very relaxed, and more untouched than other pacific islands".

"The climate, the beauty of the place and the relative under development (it's not spoiled)."

Those who stated that they had an overall great experience (28%) mentioned that their trip to the Cook Islands was *'amazing'* or *'fantastic'*, and that they *'loved the place'* and that the islands are *'a dream place'* and *'a paradise'*. Respondents also mentioned that they would *'definitely return'*, are *'already planning to return'* or they would *'always come back'*. Comments here included:

"Loved the Cook Islands and want to return and continue experiencing the fantastic lifestyle."

"It was magical. Great positive experience. We'll be back, are already planning and telling everyone we know they have to go."

One quarter of the visitors (25%) identified the friendly and welcoming local island people as a significant feature that encourages them to return to the Cook Islands. Respondents commented:

“Amazing island and amazing people so friendly.”

“We feel in love with the people and the place. Fantastic holiday already looking to come back in 2014.”

Those few respondents (n=77) who said they would not be returning to the Cook Islands, gave reasons such as: *‘it is too expensive’*, *‘service being below average’* and *‘not enough to do’*. However more than half (57%) of these respondents mentioned that their main reason for not returning is that they would like to visit other places first. Comments here include:

“Why go to the same place twice? There are so many countries to visit! We will definitely recommend it to people though.”

“Just want to see other parts of the world that I haven't visited before - really enjoyed it though.”

Out of the 93% of the visitors that said they would like to return to the Cook Islands, the majority (77%) 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 10%; 9% of visitors stated that they were ‘not sure’ or ‘needed more information’ before making a decision on which islands to include, and 7% of visitors mentioned they would like to visit ‘all the islands’.

‘Mangaia’ was mentioned by 2% of visitors as future possible destination, ‘Manahiki’ and Mangaia and ‘attracted similar levels of interest. The remaining 6% of the visitors mentioned a scattering of other islands they would like to visit: Palmerston Island, the Northern Group, Penrhyn, Suvarrow, Mitiaro, Rarotonga, Pukapuka, Manuae, the Southern Group, Rakahanga and Tapuaetai/One Foot Island.

Nearly all visitors surveyed (98%) said that they would recommend the destination to their family and friends. Nearly half (44%) of visitors stated they would recommend the Cook Islands because of the atmosphere; this was described as *‘relaxing’* and *‘peaceful’*. Respondents felt that the Cook Islands was a great place to have a break, get away and relax and therefore thought it would be a good holiday destination for those who need to get away from their busy lifestyle.

Thirty-three percent of respondents stated that ‘the environment’ of the Cook Islands was a reason for recommending the island nation to others – including the beauty, the warm climate, cleanliness, beaches, sun and naturalness of the place. One quarter of the visitors mentioned the ‘friendly local people’ as a recommendation of the Cook Islands and almost a quarter (24%) of the respondents stated the Cooks to be simply *‘amazing’* and *‘great’*. ‘Convenience’ was mentioned by 11% of the respondents due to being *‘close to New Zealand’* and *‘easy holidaying’*. Other themes that were mentioned included the culture and laid-back lifestyle (9%), the activities available (8%), the ease of New Zealand currency and language (7%), affordability of the holiday (6%), food and beverage (4%), the islands being family friendly (3%), good service (2%) and the available accommodation (2%).

Other comments were about particular islands they would recommend, and that they would recommend specifically to some people depending on their type of holiday preferences.

Only 2% of visitors (n=24) would not recommend the Cook Islands to others. Of the 19 respondents who provided a comment, the majority (69%) mentioned that other places are better than the Cook Islands, and that it is too expensive. One quarter gave reasons such as '*poor service*', '*dogs*' and '*rubbish*', and 13% mentioned that the Cook Islands was not their kind of holiday at the moment.

Final observations

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

Nevertheless this report also highlights that there is room to enhance the visitor experience and to increase the economic yield and broader community benefits associated with tourism. As in 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.

Visitor spend prior to arrival in the Cook Islands has increased slightly from the 2012-2013 annual average (\$2,026 per person up from \$2,012), and spend on the island (per person per day) has dropped from \$126 (2012-2013 average) to \$102 (Jul-Sep 2013).

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

Appendix – Cook Islands Visitor Survey



LIVE DIFFERENTLY

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)?

Adults

Children (0- 16 years old)

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