

Cook Islands Visitor Survey Results

October - December 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 October to 31 December 2013. There were 335 individual respondents to the survey - representing a total of 707 adults and an additional 152 children (this equates to 2.5% of all visitors during the period – based on the latest 2012 visitor arrival data for the October-December 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 (\$2,032 per person up from \$2,012), and spend on the island (per person per day) has dropped slightly from \$126 (2012-2013 average) to \$105 (Oct-Dec 2013). The majority (66%) of visitors surveyed come from New Zealand, 23% come from Australia. Visitors are well educated (68% of visitors have some form of tertiary education) and have a higher than average annual NZ household income (42% earn over NZ\$100,000 per year). Over one-third (39%) of the visitors travel with just one companion. Solo travellers are relatively rare (3%).

Nearly two-thirds of the visitors surveyed (63%) are on their first visit to the Cook Islands, a further 22% 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 (97%) of the visitors surveyed visit Rarotonga; 19% visit Aitutaki.

While in the Cook Islands, the total local spend per visitor per day is \$105 (compared to an annual average of \$126 for the previous year), and the average local spend per visitor during the whole trip is \$943. If the prepaid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,756 to the Cook Islands economy (or approximately \$195 per day). The 'in-country' spend is consistent with spend in the same period for the previous year (\$109 for October-December 2012).

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 un-commercialised nature of the 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 accommodation and food and beverage.

Overall satisfaction on the part of tourists is very high: 96% of those surveyed want to return to the Cook Islands and 97% 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 October to December 2013 period. Over this three month period, 1267 visitors were contacted by email to take part in the survey, and 335 responses were received: a conversion rate of 26%. These responses cover a total of 707 adults and 152 children. The conversion rate for this period is lower than for the 2012-2013 annual average (33%) but higher than the Oct-Dec 2012 quarter (20%).

The data presented include detailed information on:

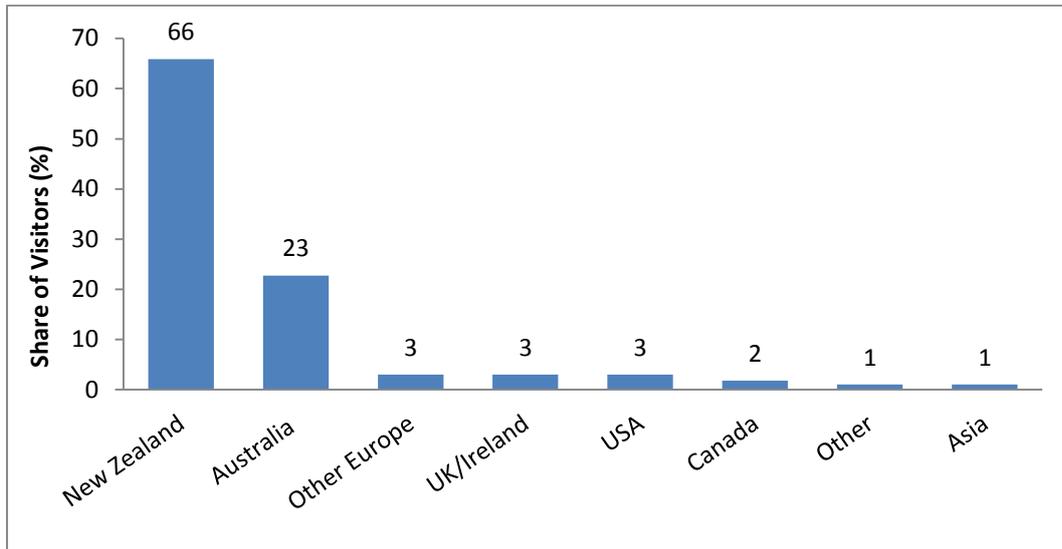
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook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

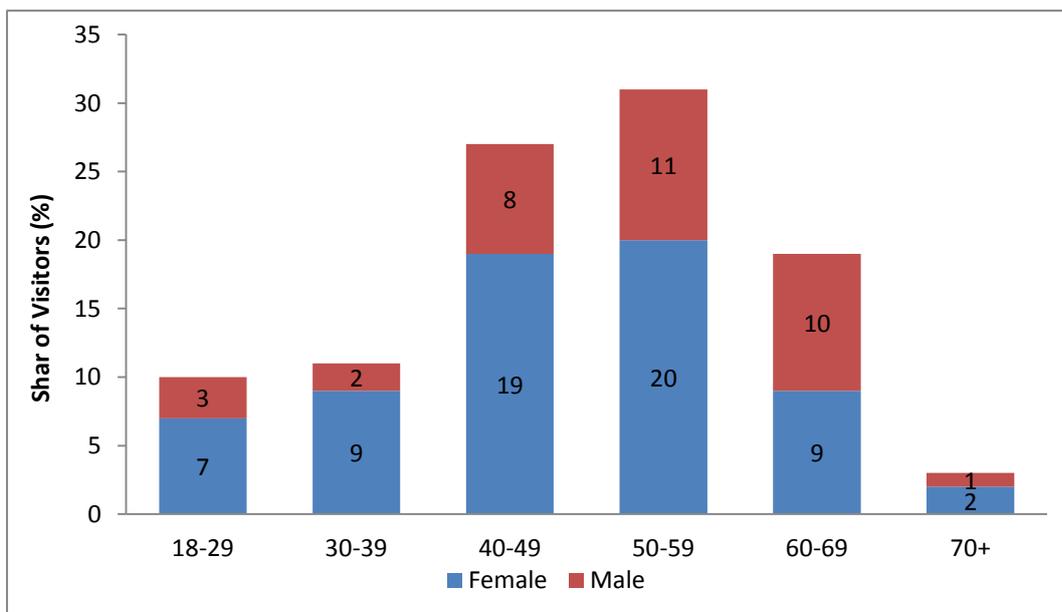
The majority of the visitors surveyed (66%) come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 23% of respondents. Europe, Great Britain, USA, Canada and Asia represent the other key source markets.

Figure 1: Country of Origin (n=334)



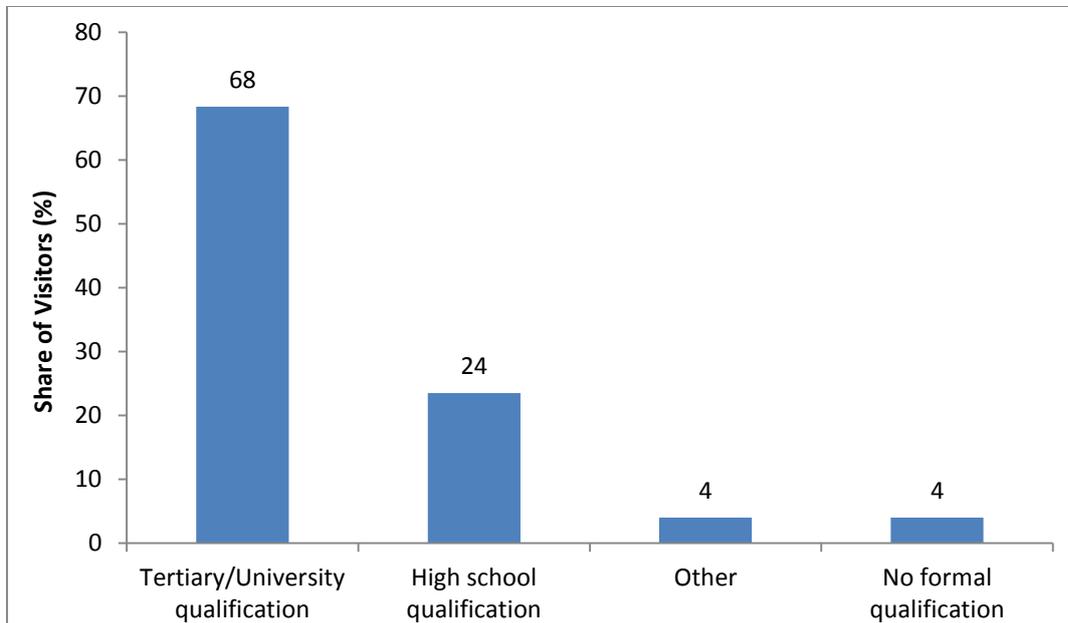
More women (65%) than men (35%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented age group, followed by the 40 to 49 and 60 to 69 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=319)



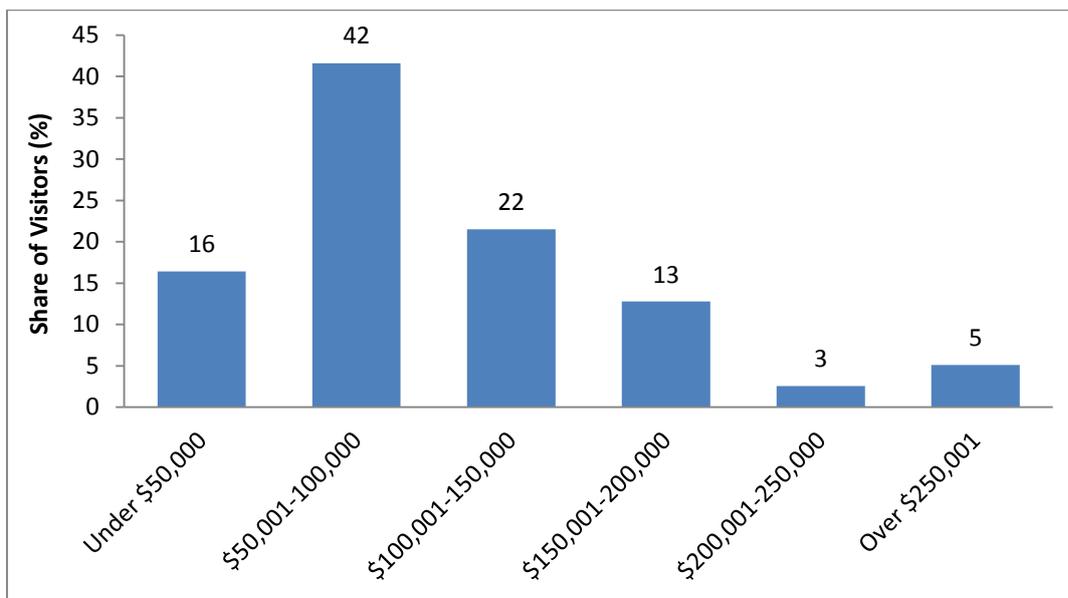
Visitors are well educated. More than two-thirds (68%) of the visitors surveyed had some form of tertiary qualification a further 24% completed education at high school (Figure 3).

Figure 3: Highest Qualification (n=319)



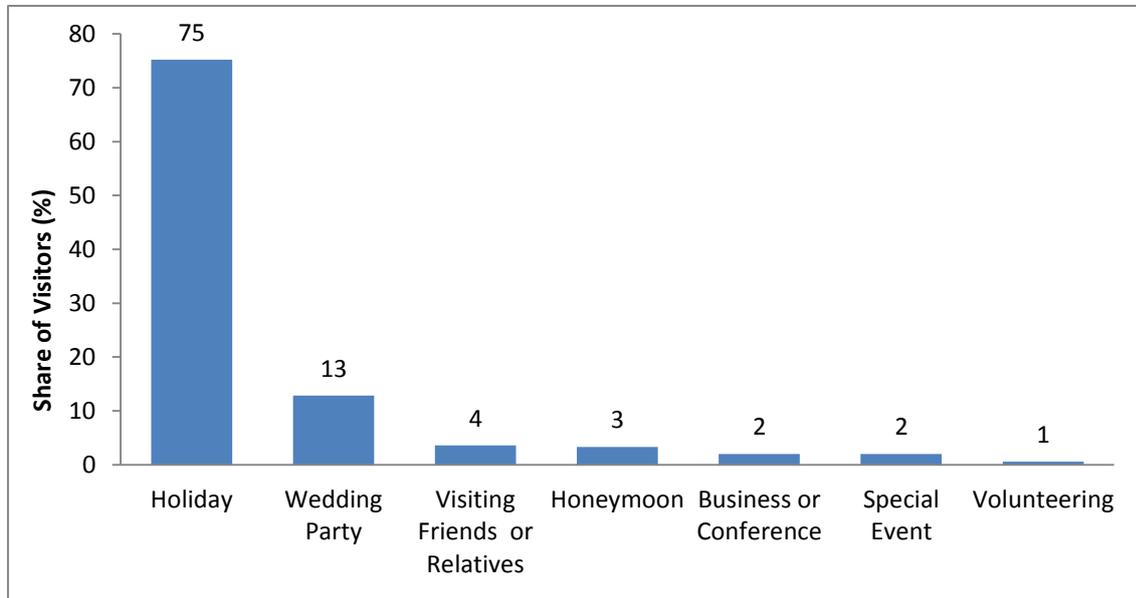
A significant group of visitors (42%) have an annual household income of between NZ\$50,001 and NZ\$100,000. A further 22% earn between NZ\$100,001 and NZ\$150,000. One fifth (20%) of the respondents have a household income of over NZ\$150,000 per year (Figure 4). The latest national statistics show a mean New Zealand household income of NZ\$85,588.

Figure 4: Annual Household Income in NZD (n=274)



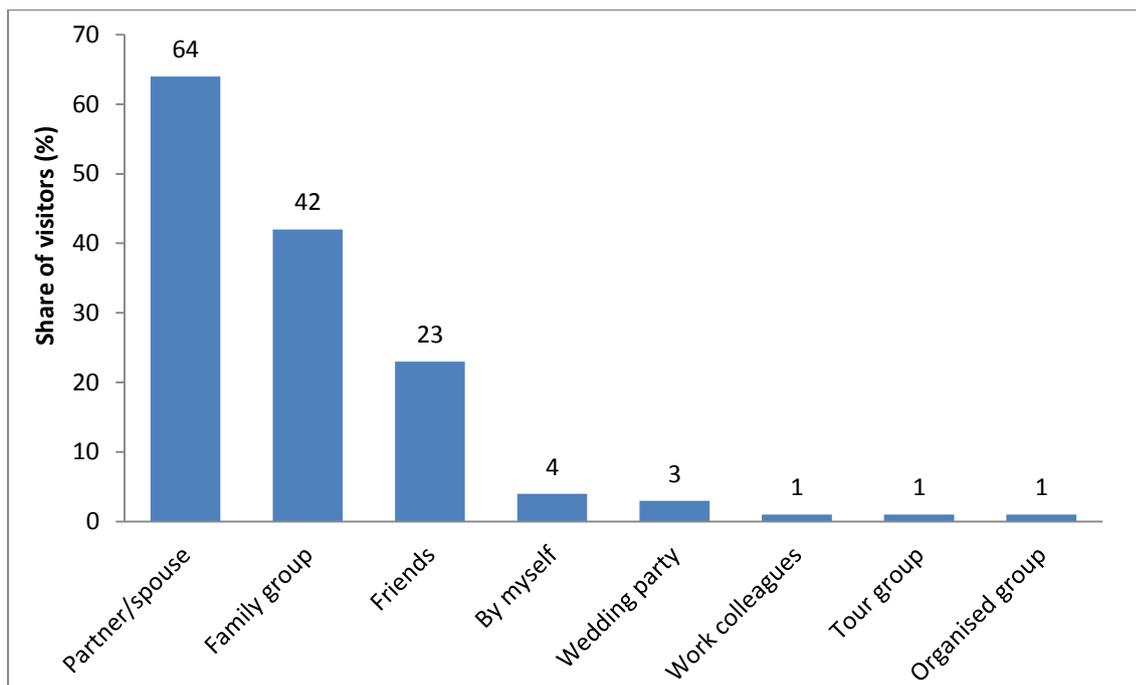
Three-quarters of visitors surveyed from October to December 2013 come to the Cook Islands for a holiday (75%), with the second major purpose of visit being to attend a wedding (13%). Four percent of respondents visited friends/relatives and 3% came for a honeymoon. Just 2% of survey respondents came for business/conference travel or a special event (Figure 5).

Figure 5: Main Purpose of Visit (n=335)



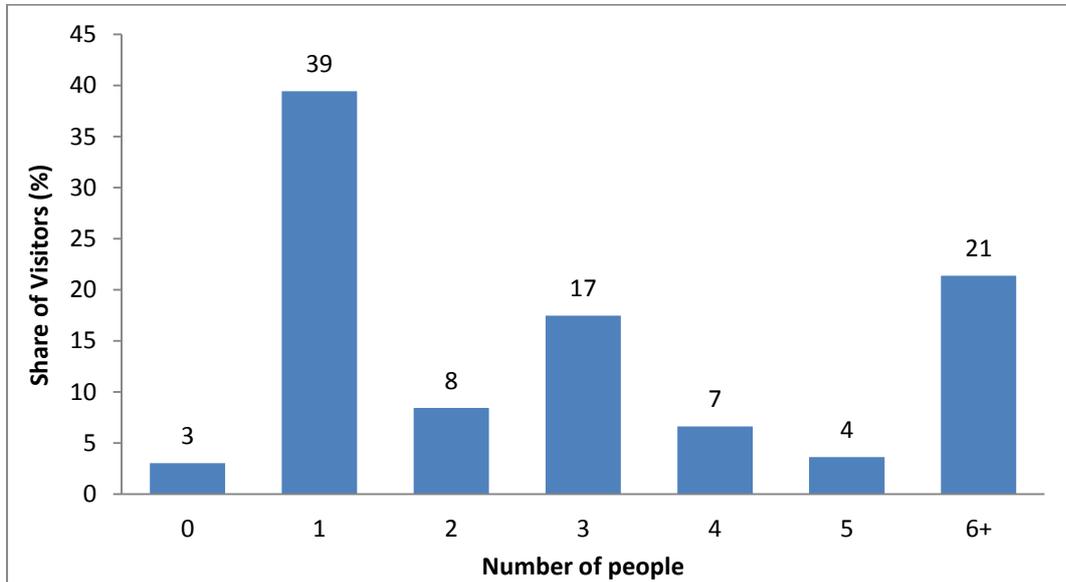
Just under two thirds (64%) of the visitors surveyed travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (42%) or friends (23%). Those travelling alone, with a wedding party, with colleagues or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with whom? (n=334)



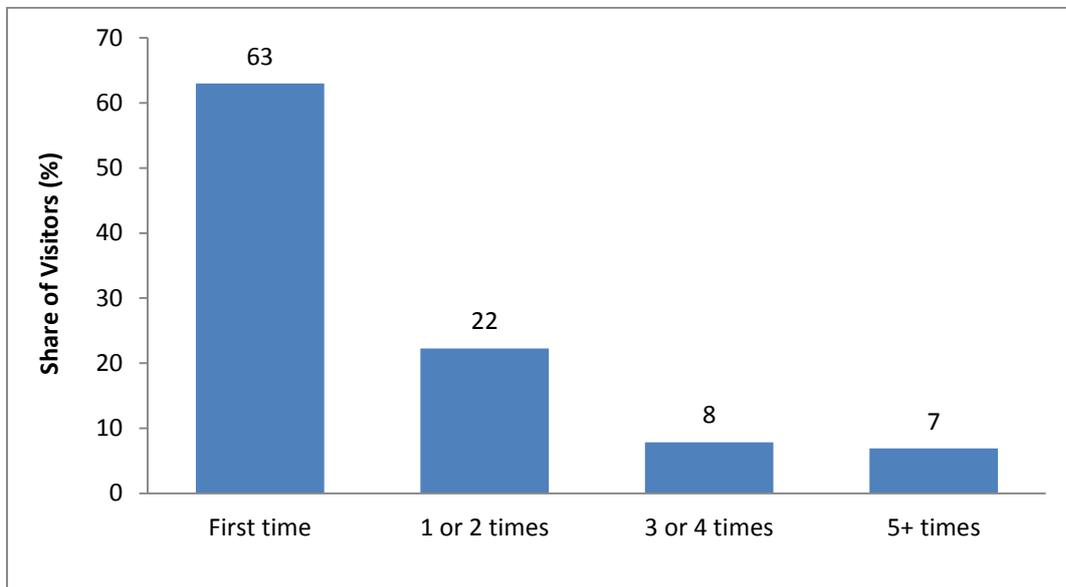
Most visitors (39%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=332)



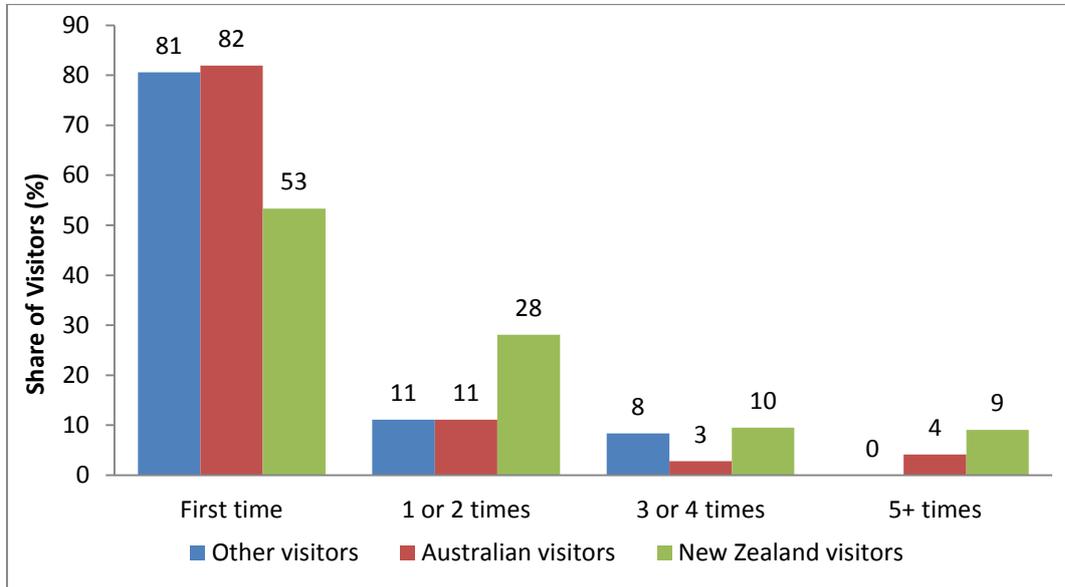
Most visitors (63%) are on their first visit to the Cook Islands. A further 22% have been to the Cook Islands once or twice before. A smaller group (15%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=319)



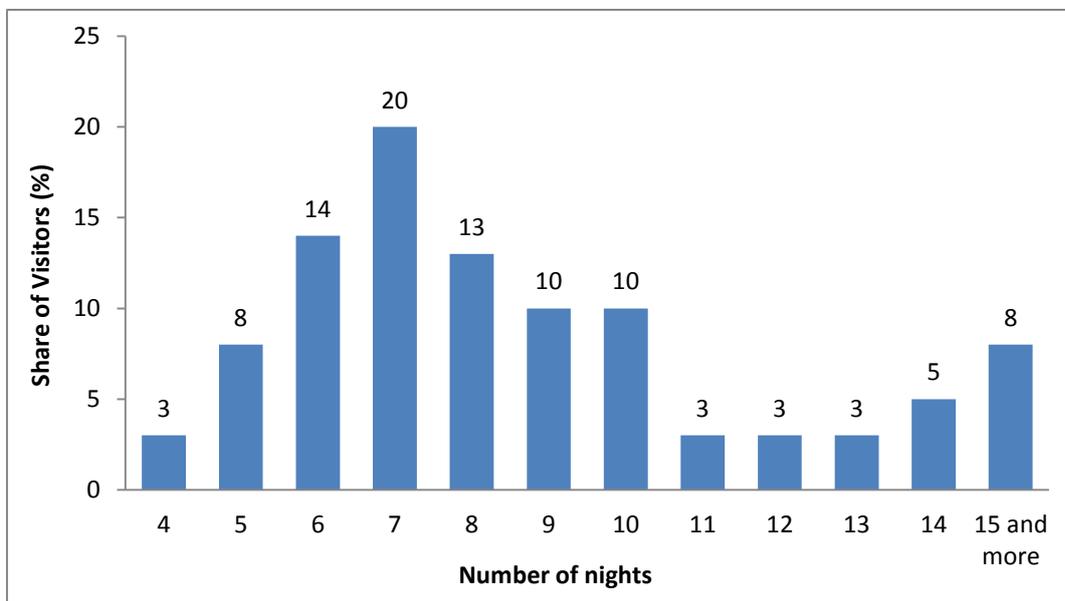
New Zealanders are more likely to be repeat visitors than those from other source markets (Figure 9). Twenty-eight percent of New Zealanders have visited once or twice before compared to only 11% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=318)



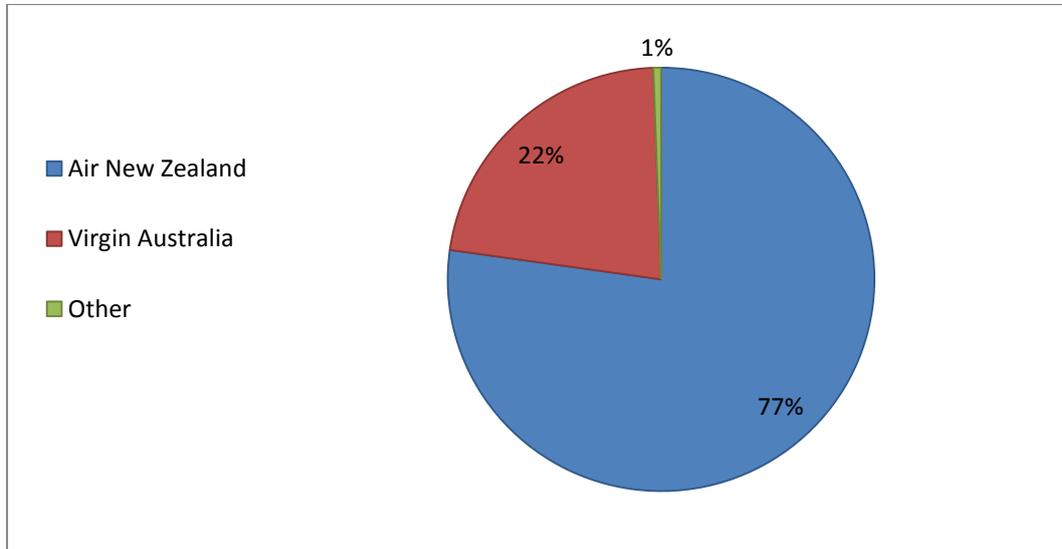
The average length of stay in the Cook Islands is 9.0 nights with 78% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=328)



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

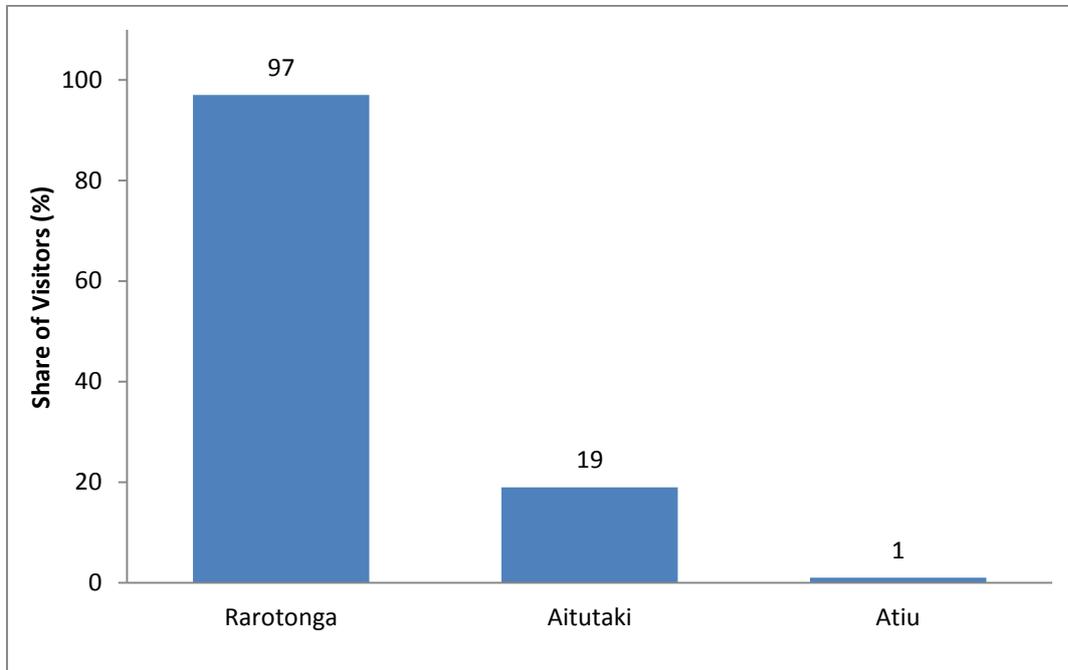
Figure 11: Airline used (n=328)



For 92% of visitors, the Cook Islands represent 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 of visitors were asked about other destinations that were including on their journey the top destination mentioned was New Zealand (52%), second was USA (mentioned by 30% of respondents). Just over a quarter of visitors (26%) stated that Australia was part of their larger trip and 17% mentioned a destination in Asia. Other destinations mentioned by respondents included Canada (13%), Europe (9%), South America (4%) and other Pacific Islands (4%).

The majority (97%) of visitors to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (19%) (Figure 12). The other islands were not mentioned often by the survey respondents

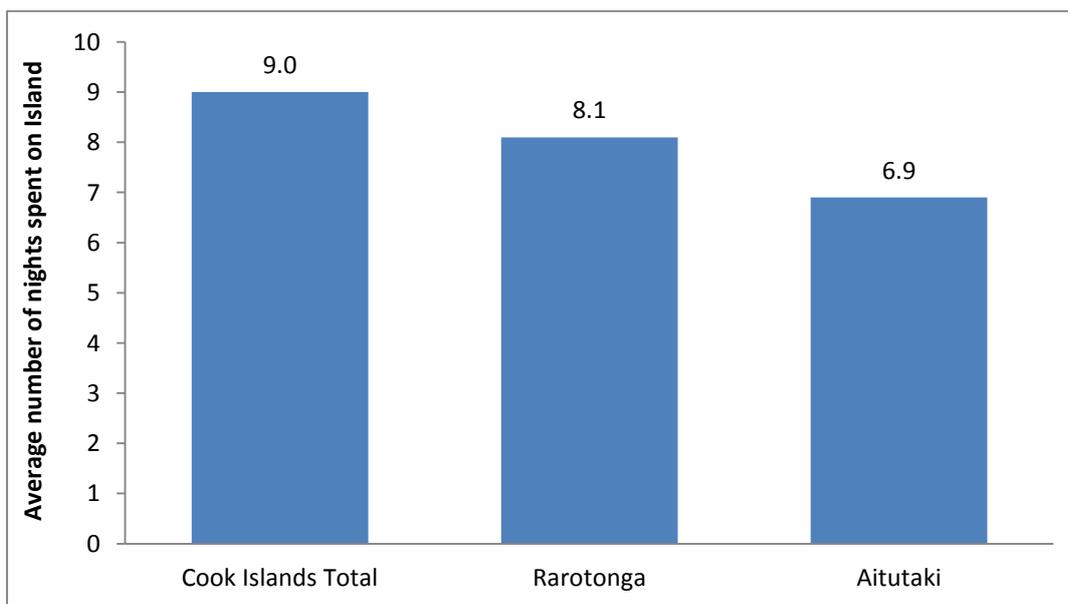
Figure 12: Visited Islands (n=333)



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

The average length of stay on Rarotonga is 8.1 nights (Figure 13). For the visitors that went to Aitutaki, the average number of nights spent on the island is 6.9. These figures are similar to the annual average for 2012-2013 (Rarotonga 7.8 nights and 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=333)

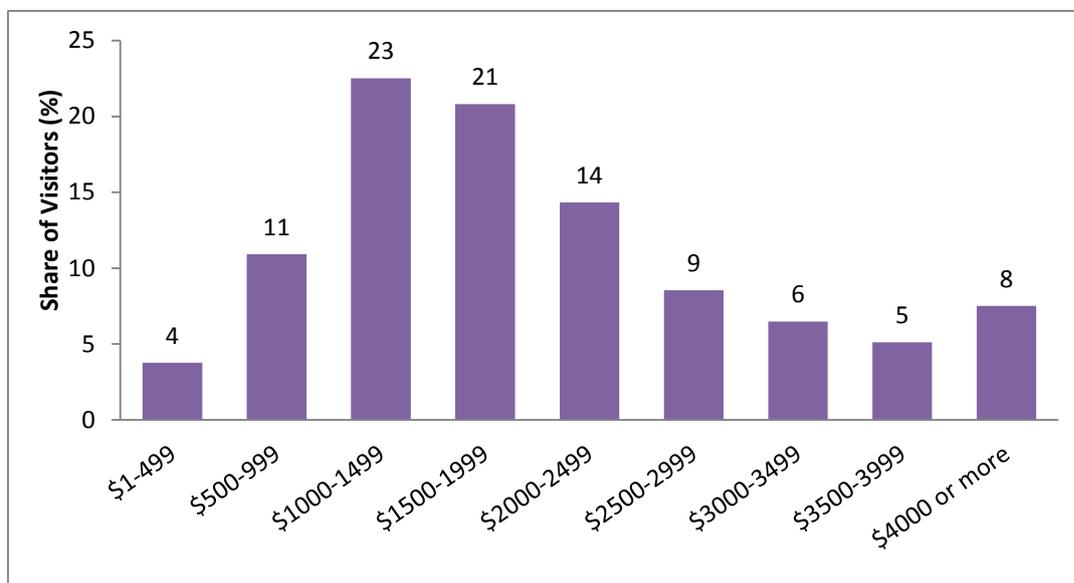


Visitor Expenditure

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: 859 people comprising 707 adults and 152 children.

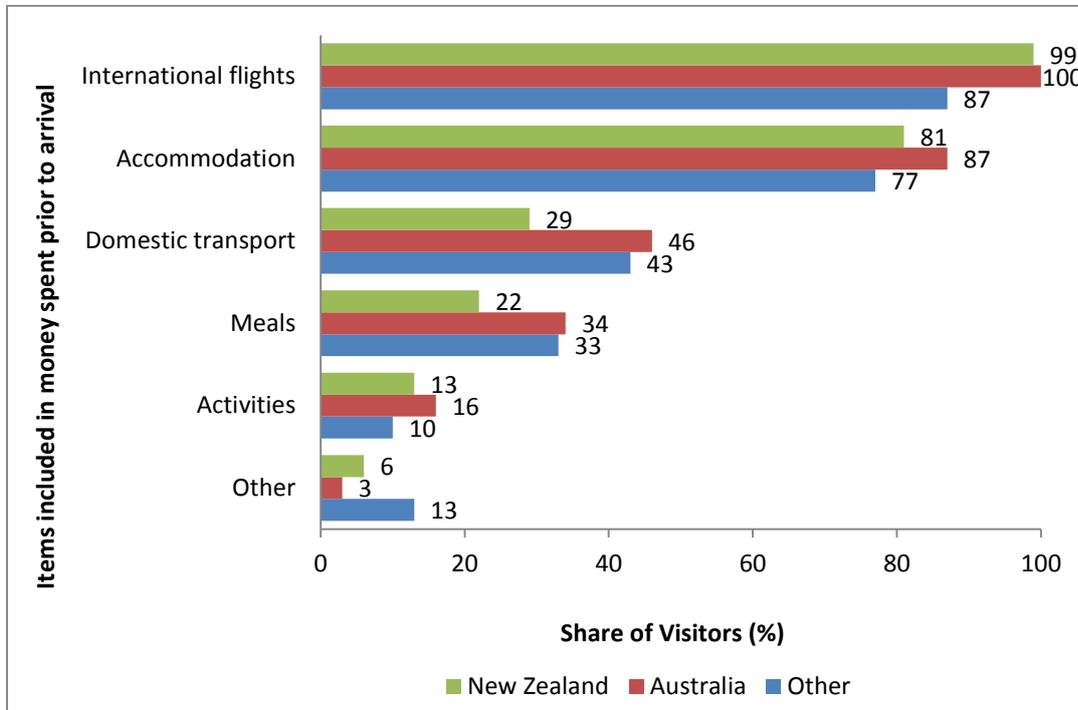
On average, visitors to the Cook Islands spend NZ\$2,032 per person prior to arrival. Most (58%) of the visitors spend between \$1000 and \$2500 dollars. These figures remain very consistent with the data from the previous year (average spend of NZ\$2,012 for the 2012-2013 period) (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=293)



Spending prior to arrival usually includes accommodation: in 81% of the cases for New Zealand, 87% for Australian visitors, and for 77% 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=297)



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 \$813.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$105 (Table 1). This figure is very similar to the previous quarter (\$102 for July-September) but is lower than the overall spend figure for 2012-2013 (\$126). Most money spent locally is on restaurants, cafes and bars (31%), accommodation (22%), shopping (15%), and groceries (8%). These per person expenditure figures are based on 302 survey responses covering a total of 859 people (707 adults and 152 children).

By multiplying daily spend by the average stay (9.0 nights) it is clear that each visitor spends on average \$943. The total figure of what is spent locally and what flows back to the Cook Islands from prepaid expenses is \$195 per visitor per day (\$105 plus \$90), or \$1,756 (\$943 + \$813) per total personal visit.

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

Expenditure Items	Overall n=302	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	33	31
Accommodation	23	22
Shopping	15	15
Groceries	8	8
Activities	7	7
Vehicle rental	7	7
Domestic flights	3	3
Other	3	3
Cruising	2	2
Petrol	2	2
Public transportation	1	1
Total expenditure per person per day	\$105	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 (but note small sample size). New Zealanders spend the least.

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

Expenditure Items	n=13	n=71	n=199	n=8
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	63	35	34	42
Accommodation	37	20	23	65
Shopping	7	17	15	11
Groceries	11	8	9	6
Vehicle rental	5	7	9	4
Activities	12	9	8	15
Other	1	6	3	8
Domestic flights	2	6	3	22
Petrol	2	2	2	1
Cruising	1	3	2	9
Public transportation	1	1	1	1
Total spend (NZ\$)	\$141	\$114	\$109	\$184

Australian spend for this quarter (\$114) was lower compared to the 2012-2013 average of \$137, and European visitor spend at \$184 per person per day was up from the average of 2012-2013 of \$118 (*NB small sample size*). USA/Canada spend continues to be the highest spending group; at \$141 for this period it was higher than the 2012-2013 average of \$139 (*NB small sample size*). New Zealanders also spent more in the previous year (average of \$120 for 2012-2013) – compared to \$106 per visitor per day for the October to December 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). Three-quarters (74%) of the visitors surveyed ranked their experience as 'very satisfied' (up somewhat from the 67% 'very satisfied' in the annual average for 2012-2013). Very few visitors (3%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=329)

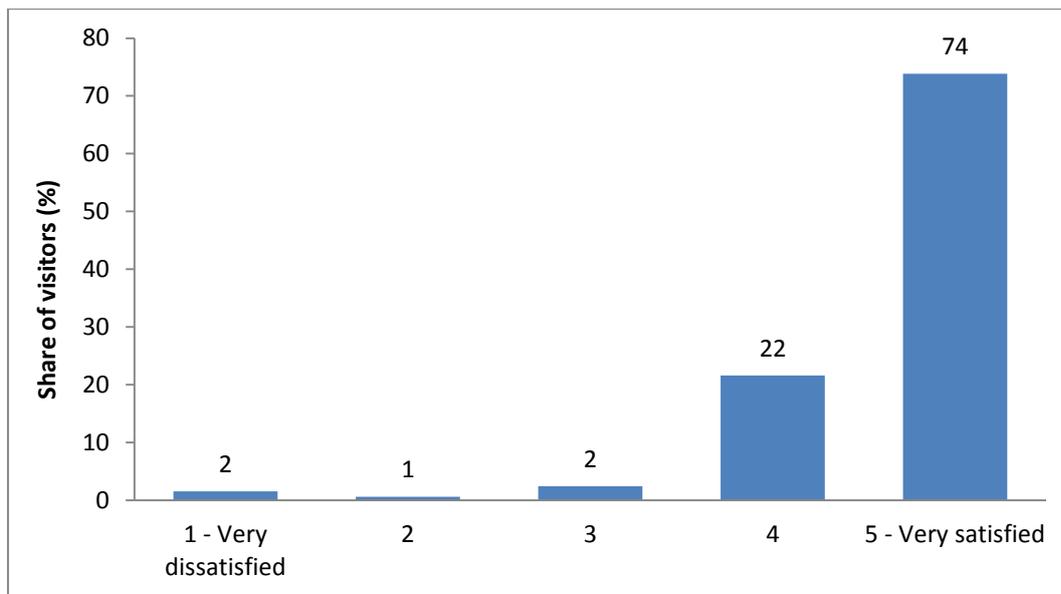


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (82%) 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). Cultural interaction activities rank highest (average satisfaction of 4.7) followed by water-based activities (4.6), land-based activities (4.5) and shopping (4.3). 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=2-325)

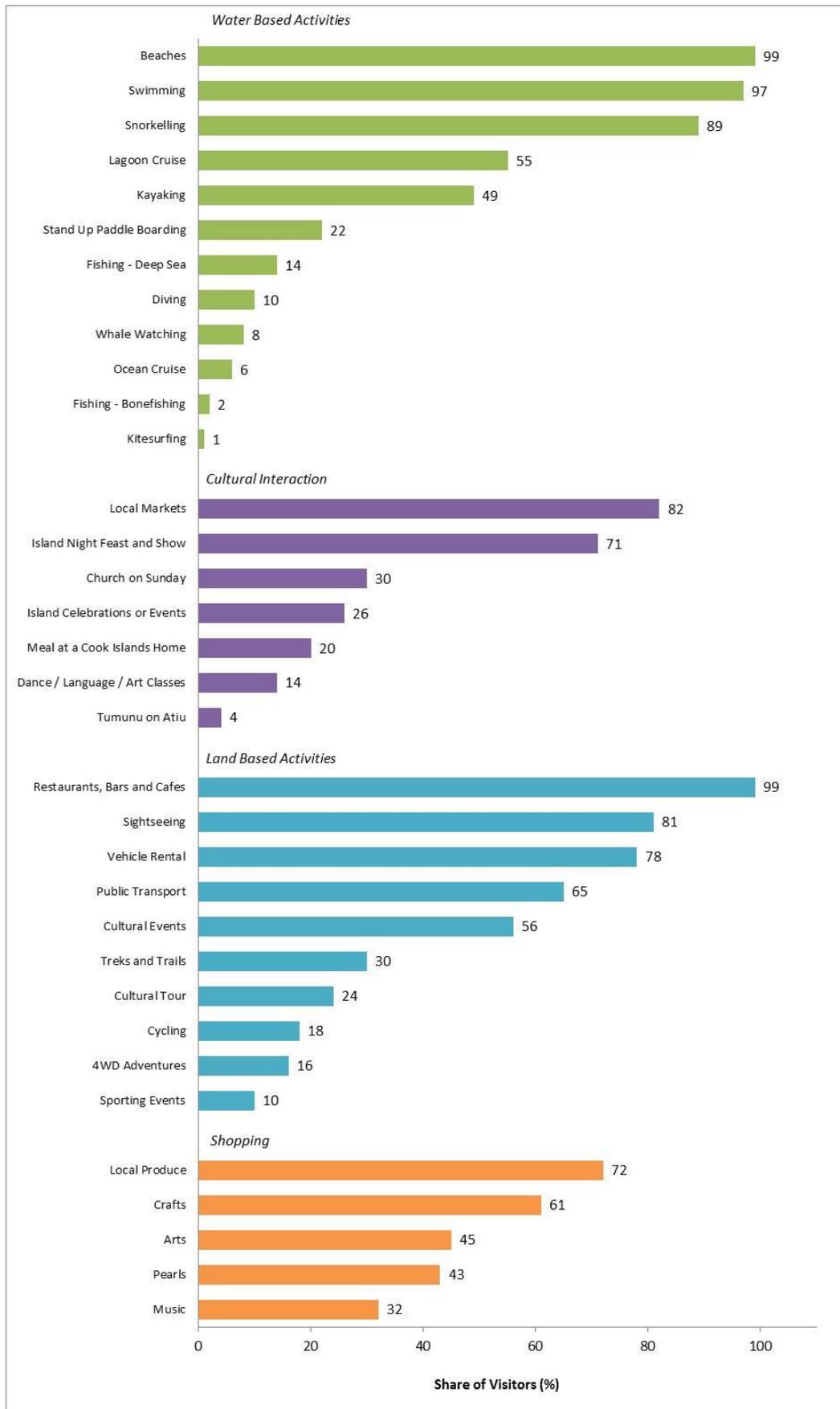
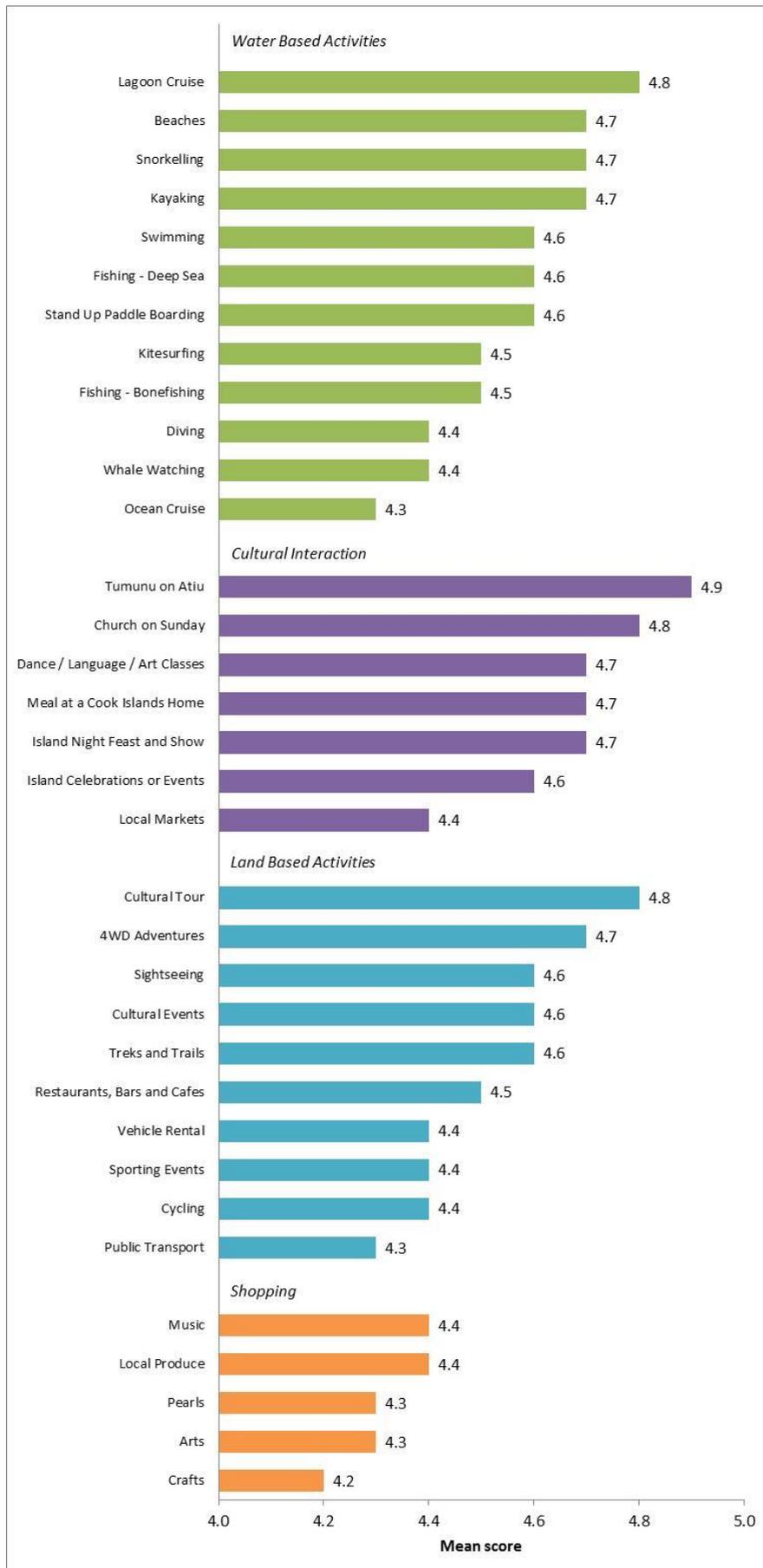


Figure 18: Degree of satisfaction in activities (mean score out of 5)



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 October to December 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 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 slight trend in a higher level of satisfaction across most items for the current quarter compared to the average for 2012-2013.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5) (n=335)



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, 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’ (50%), ‘local people’ (47%) and the ‘atmosphere’ (32%).

Table 3: Most appealing aspects of the Cook Islands (n=324)

Themes	Share of respondents (%)
Environment	53%
Local people	45%
Atmosphere	28%
Activities, attractions, entertainment and events	20%
Food and beverage	10%
Level of service	7%
Un-commercialised	5%
Overall good experience	4%
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 (53%) 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’, ‘cared for’ and ‘fragrance’ 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:

“Surrounds are very beautiful and picturesque...gorgeous just how you would imagine a tropical island”

“Safety and quality of the beaches”

“It was 26 degrees every day!”

“Stunning Aitutaki lagoon. It was beautiful, but also very clean. We loved that there was no rubbish and the habitat is cared for and respected by the locals”

Local people

Nearly half (45%) 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', 'pride' and 'generosity'.

Comments included:

"The ease and grace that islanders have sharing their homeland with tourists."

"The people. Always the people. I always feel as though I have arrived 'home' when my plane lands."

"The Tangata whenua! The people, The people! The people! - That's why we keep coming back plus exquisite scenery and weather to die for!!! Never want to leave!!!! Your relaxed, casual, caring, helpful, open, honest, friendliness and good natured, happy dispositions is unbeatable! We love you SOOOO much!"

"Island time, talking to local and how helpful and keen everyone was to help you out, good laughs and relaxed"

"We asked for a lift on our first day with some locals, to organise a rental car, as it was Sunday and the bus never came - they would not take any money from us even though they went out of their way."

Atmosphere

Just over a quarter of survey respondents (28%) focused on the relaxed atmosphere of the Cook Islands. They considered the Cook Islands to be a very peaceful, safe and laid-back. Respondents used words such as 'remote', 'not crowded', 'safe', 'slow pace of life', 'unpretentious', 'simplicity' and 'R&R' to describe the overall atmosphere. The notion of 'island time' was also frequently highlighted.

Comments included:

"The relaxing and just being able to do things at your own time."

"Laid back feeling of the island and its people, the simplicity of the place. No high-rise buildings, and the usual tourist rush and offers. Loved the 2 buses which formed the public transport. Feeling of security."

"... not too many rules and regulations like Australia."

"Island time, is the most appealing of all and it isn't something you can buy, sell or trade, it is the feeling."

Activities, attractions, entertainment and events

Activities and entertainment were mentioned by 20% 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 in the reef - my first ever try at snorkelling - was amazing and the fish were out of this world."

"Snorkelling and deep sea fishing was fabulous."

"The beauty of all the arts & crafts at the markets & shops."

"Relaxing! Warm, lots to do if you want an adventure."

"Also the cruise that we undertook at Aitutaki was outstanding. The staff and the whole experience was well above expectations. Also the food served was awesome."

Food and beverage

Ten 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:

"Absolutely the food!! Was amazing!"

"The fresh produce, fresh fruit smoothies and smell of the flowers."

"Variety of restaurants available to eat at with lovely food and views/atmosphere"

"Very much improved cafes since I first visited 5 years ago."

Level of service

Seven 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 tour operations being helpful and going beyond expectations. Visitors also emphasised the lack of pressure to buy which made them feel comfortable. Again some respondents made comments on some very entertaining local bus drivers. Comments included:

"Hospitality in the cafes at Muri was amazing."

"I found the level of service to be excellent and the people most helpful and friendly."

"Loved everything about Rarotonga. People and staff were amazingly friendly and helpful and interested in you as a family and where you were from. Loved the crazy happy bus/tour driver that we had on a regular run into town each day."

"The Cook Island people are beautiful, friendly people. Service is provided with a smile."

"There was no hassling to buy goods or enter restaurants, cafes etc."

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:

"It is wonderful that the island has not been spoilt by commercial tourism and great that locals are all kept employed within the island."

"The low key tourism. I felt like I was on a Pacific Island rather than a tourist resort."

"The fact it hasn't changed drastically in the 40 years I have been associated with Rarotonga."

"Liked that there were not fast food outlets like KFC and McDonalds."

Overall good experience

A smaller number of respondents (4%) 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:

"Everything. Loved the lot."

"My first time to visit as I have always gone to Fiji. Loved it! Will definitely return - in fact I can't wait to come back!"

"This is our 10th trip in 3 years and love every minute."

"The natural beauty, the simplicity, the friendliness of Cook Islanders...it's a beautiful country, don't over – sophisticate...this is WHY we love it..."

Accommodation

Another 4% of respondents noted that the accommodation they stayed in was an appealing aspect of their visit. The key words used to relay the visitors' experience were 'perfect', 'magical' and 'fabulous' referring to the quality of the offering, the setting and welcome from hosts. Comments included:

"Aitutaki and the lagoon were heavenly. And the resort was perfect. The best holiday I've ever had. Above my high expectations."

"Renting a house on the beach. We had privacy, peace and quiet and could look after ourselves."

Convenience

Convenience of the Cook Islands as a destination was mentioned by a small proportion of respondents (3%). In particular, they referred to the ease of getting around the islands, and the convenience of using the New Zealand dollar. Comments included:

"It is an easy place to holiday, travel is easy, people are friendly, and NZ currency makes knowing how much your holiday has cost easy."

"You could go all the way around on a bus or scooter."

"The ease of life there - getting around, simple living, nice beaches, pleasant weather"

Least appealing aspects of the Cook Islands

Visitors were also asked "What did you find least attractive or appealing about the Cook Islands on your most recent visit?" Just over a quarter (26%) of visitors took the trouble to note that they found nothing was 'unappealing', that there was 'nothing to complain about', or that the only 'unappealing' aspect was that they had to leave. This group of visitors responded with comments such as "honestly - nothing" and "nothing was unattractive, least appealing thing is that I had to come home". There were, however, a number of areas that did attract comment (Table 4).

Table 4: Least appealing aspects of the Cook Islands (n=298)

Themes	Share of respondents (%)
Public services and facilities	14%
Stray animals (dogs, roosters) and mosquitos	10%
Accommodation	9%
Food & beverage	8%
Poor weather	8%
Flight/airline-related issues	8%
Price of goods & services	7%
Rubbish & natural environment care	7%
Local people	5%
Safety & poverty	5%
Attractions & activities	3%
Rental cars/scooters	3%
Too touristy	1%

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

Public services and facilities

Fourteen 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 (as New Zealand citizens) having to obtain a Cook Island driver's licence. Comments included:

"On our way back we stopped in Rarotonga for a few hours. I wanted to shop for arts and crafts but all the stores were closed because it was Sunday. That was highly disappointing."

"Big holes in the road in some places when riding motor scooter around island."

"Perhaps in the main town some of the buildings/shops should be painted up a bit - looked a little bit run-down."

"Waiting for a bus....not frequent enough."

"Lack of clean public toilet facilities."

"Having to get a Drivers Licence - just charge us \$20 instead!"

Stray animals and mosquitoes

The stray dogs, noisy roosters and mosquitoes continue to be an annoyance or a worry for 10% of respondents during their time spent in the islands. This figure compares to a similar proportion for the 2012-2013 annual average (9%). Respondents used a variety of words to describe this theme including 'roaming', 'barking', 'animal welfare', 'dog fights', 'neglect' and 'feel sorry'. Comments included:

"The numerous wild DOGS which pose a constant danger. Domestic animal welfare is a concern. No SPCA to report animal neglect which I sadly too often viewed!"

"Packs of dogs on the beach very intimidating."

"Blasted rooster crowing outside our accommodation every morning."

"Felt bad for all the stray animals."

Accommodation

Nine percent of visitors commented on the expense 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, and that in some establishments staff seem to take no interest in guests. Comments included:

"I thought Rarotonga accommodation was a bit old and needed tidying up...not so clean."

"Our accommodation. Too many people, dated décor and not that appealing. We had friends staying at another resort and spent most of our time there as was far superior and better facilities etc."

"The cost of accommodation was extremely high and the quality of the accommodation was less than standard. The staff there were not overly friendly or efficient."

"We loved everything about it - if we had to make any negative comment it would be about the cost of accommodation which leads to an unmet expectation of quality. A similar costing hotel anywhere else in the world would have a lot more to offer."

Food and beverage

A number of visitors (8%) commented on the cost, quality and availability of food and beverage in the Cook Islands. Respondents noted that food was 'expensive' and 'disappointing', and that there was a lack of local produce. This included all options such as restaurants, resort dining and shops. Comments included:

"Difficulty in getting all grocery needs in one shop. Lack of local produce in supermarkets. Not knowing where to get local fish etc easily."

"Expensive food...having to buy water in restaurants, what's up with that?"

"Food at the supermarket and at cafes and restaurants is extremely expensive compared to my visit in 2007. In 2007 I found food and beverages very affordable. On my most recent trip I found café coffee and café food unaffordable. It was too expensive."

"Some food places not good value for money and we got sick, tummy bug, all four of us we suspect from drinking different drinks but with local ice."

Flight/airline-related issues

Another 8% of visitors made specific comments about flight or airline-related issues. In particular, respondents made reference to the timing of flights in the early hours of the morning, and issues with late or cancelled flights and associated poor service from the airlines. Comments included:

"Leaving on the 'Red Eye' flight, I will not do it again."

"Night time return flight which greatly interfered with the relaxed holiday feeling afterwards."

"The unreliability of Virgin Airlines. We were stranded on Rarotonga for an extra 6 nights without explanation."

Poor weather

A number of visitors (8%) mentioned that the poor weather mainly due to strong winds, rain and cloudy 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:

"Bad weather it was raining 3 days of 6!!!"

"It was so windy for the first week that we couldn't enjoy the beach as much as we would have liked. But that's weather and nothing can be done about it. We just went driving/dining/shopping instead!"

"Rain, rain and more rain. Picked the wrong week for the weather but still made the most of it."

Other unappealing aspects mentioned by visitors include: price of goods and services (high cost, imported), rubbish and natural environment care (burning of rubbish, littering by tourists or locals?), local people (occasional lack of friendliness and interest, poor service), safety and poverty (petty theft, food poisoning, poverty of locals), attractions and activities (limited range), rental cars and scooters (quality, cost and service), and being too *touristy* (too many tourists, loss of culture).

Comments included:

"We were robbed on our first night on Rarotonga at our resort. Lost new mobile iPhone and \$400.00."

"Lack of cultural activities. Two days was long enough to do the little that was available."

"Expense of hiring a vehicle & attitude of rental person."

"The cost of going to other islands is prohibitive."

"Local peoples attitude outside of our resort. This includes shop keepers. They do themselves no favours by appearing so disinterested."

"Rubbish on the beaches. Very sad. We assume this is tourist doing and not local as the locals seem to take a lot of pride in their gardens and homes."

"Litter. There is A LOT of rubbish on the roadsides and on the beach. I watched a school student (around 12yrs) drop rubbish and saw a group of locals having a 'get together' at the rugby club (Muri Beach) and leave behind a HUGE amount of rubbish. While the tourists are pretty good at cleaning up after themselves, many of your locals are not."

"It was disappointing to see so many small fires around the island with people burning plastics etc. Also sad to see the families who live in poverty on the island."

"We have to really think about this...the things that stand out are the expense and some of the service we received was poor...this was usually unfriendliness and apathy which really surprised us."

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 (41%) of respondents said 'yes'. Suggestions mentioned by respondents focussed on public services and infrastructure (18%), flight schedules in and out of Cook Islands (17%), entertainment, activities and transport (14%), value for money in accommodation (12%), environment/safety/animal care (12%), visitors regretting they did not stay longer (12%), quality and cost of food and beverages (10%), weather (8%), friendliness of locals and service levels (9%). Comments on these themes included:

"Improve the customer service skills of the security staff at the airport. You don't want the last impression a visitor has of that country to be some grumpy rent-a-cop in a uniform at 2am."

"Better development of the infrastructure to enable the islanders to be more self-sufficient."

"Flights in and out are at bad times I wouldn't make the trip again just for that reason."

"Lowering cost of airfares to outer islands."

"For those people who fly in and out on late arrival/departure flights it would be good to have a mid-week evening market so you get to experience this. And it would be useful for these late departure flights if there was a speedier check-in process."

"Room tariffs should include early check-in and late check-out to line up with flight arrivals and departures."

"The amount of litter was quite shocking. I think there could be more effort made by both locals and tourists to take care of your beautiful island. Plastic is everywhere and ending up in waterways. I was very concerned about this.."

"Please do something to control the packs of dogs on beaches. I was badly scratched by an over friendly dog."

"Staying an extra few years - Unfortunately I have a job that requires me to earn a living."

"Local foods should be promoted over other offerings which can't compare to world standards."

"More sunshine - we had rain almost every day!! Still this was our 6th trip so we know what to expect and it does not put us off coming again."

"The hotel staff could have been more pro-active in suggesting outings and places to visit, they were fine if you asked them to do something, but they could of added a lot of value to the local economy by being more proactive."

"Yes, some free tickets to allow us to return again and again and again. This is a difficult question to answer as it is not really about changing the Cooks too much to meet my expectations. Much of the delight in travel is being able to experience a different way of living and doing things."

Reasons to return to the Cook Islands and recommend to others

The majority of visitors (96%) 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-five 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 'the lack of tourist development'. Visitors used key words such as 'refreshed', 'unwind', 'recharge', 'R&R', 'slow', 'no rush' and 'unhurriedness' – indicating the emphasis they place on the islands as a place to completely relax. Comments included:

"A true relaxing holiday."

"Seems like an ideal spot for us to come to stop and recharge our batteries."

"I absolutely loved it in Rarotonga, very relaxing just what I needed after a very hard year."

"I came back to NZ feeling totally refreshed and happy. I enjoyed the 'no pressure' atmosphere mixed with ample supplies of anything you need, lovely restaurant/cafe meals, the climate, the snorkelling at our front door - so many things! It is where I will go again to revive and come away from feeling like a 'new person'."

Those who stated that they had an overall great experience (31%) mentioned that their trip to the Cook Islands was 'amazing' or 'magic' or the 'best holiday ever', and that they 'loved it' and that the islands are 'like a second home' and 'a paradise'. Respondents also mentioned that they would 'definitely return', are 'already planning to return' or they would 'continue to come back'. Comments here included:

"My partner and I loved our trip, It's easily the nicest place we've ever been on holiday, we loved the people and the atmosphere and the food (best food ever, no matter where we ate), and we just fell in love with the island. We were so sad to leave and we will definitely be coming back.."

"It is the only place in the Pacific that holds the magic for me: Even after 17 visits."

"We honeymooned there 10 years ago, came back for our 10th anniversary and will return for our 20th."

The unspoiled warm environment and natural beauty of the Cook Islands was noted by just over one quarter of the visitors (28%) as a significant factor in leading people to want to return. The respondents enjoyed the beautiful unspoilt scenery, the lovely lagoons, the gorgeous white sandy beaches and the warm climate. Comments included:

"Aitutaki was the best lagoon we've ever seen, good weather and we ate marvellously!!!"

"A magic place of physical beauty relatively unscathed by large scale commercial developments; wonderful people."

"Beautiful part of the world."

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:

"We love the people & laid back style."

"Loved the people and the place."

Those very few respondents (n=14) who said they would not be returning to the Cook Islands, commented on the high cost of travel, the poor service standards and the lack of things to do. Comments here include:

"For us is a such journey possible only one time (money, age (71/68 y.)"

"Too boring, found service standards too poor compared to the rest of the world."

Out of the 96% 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 (67%) 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 11%; another 12% of visitors stated that they were 'not sure' of which islands to include, and 10% of visitors mentioned they would like to visit 'all the islands'. 'Mangaia' was mentioned by 3% of visitors as future possible

destination. Other visitors mentioned they would like to visit some of the islands belonging to the Northern Group (6%) or the Southern Group (2%). Five percent mentioned the high cost of visiting other islands as a barrier for not visiting.

Nearly all visitors surveyed (97%) said that they would recommend the destination to their family and friends. Over half (56%) 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 sit and read a book' and therefore thought it would be a good holiday destination for those who could do with some 'island time' away from their busy lifestyle.

Forty-one 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 untouched and unspoilt nature of the place. One quarter (25%) of the visitors mentioned the 'wonderful, friendly local people' as a recommendation of the Cook Islands and almost a quarter (23%) of the respondents stated the Cooks to be simply 'amazing' and 'awesome' describing it as '*a complete holiday destination*' and with '*what's not to like?*'. Other themes that were mentioned included the attractions and activities available (13%), the convenience of the islands as a destination (11%), affordability of the holiday (8%), the ease of New Zealand currency and language (7%), food and beverage (7%), the islands being family friendly and safe (6%), already have recommended to others (5%), culture and laid-back lifestyle (4%) and the available accommodation (2%).

Comments included:

"A great place to 'chill out' and 'recharge', easy and safe with lots to do or do nothing if that's your choice."

"If you are looking for a really social party place go somewhere else VERY RELAXING JUST AWESOME NEVER FELT SO GOOD AFTER A HOLIDAY BEFORE."

"Beautiful environment, wonderful people, and we should be supporting our Pacific region as much as possible through tourism"

"Amazingly beautiful and very easy to get around. Accommodating people who treat each tourist as though they are the only person visiting the island. Thank-you"

"Best holiday destination ever. Everything about it is absolutely fantastic. My partner and I have already recommended the Cook Islands to heaps of people!!"

Only 3% of visitors (n=9) would not recommend the Cook Islands to others. Of the 8 respondents who provided a comment, the majority mentioned that it is too expensive.

Final observations

This report shows that the Cook Islands tourism industry generally performed well during the October - December 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. The on-going concerns around stray dogs should also be noted.

Visitor spend prior to arrival in the Cook Islands has increased slightly from the 2012-2013 annual average (\$2,032 per person up from \$2,012), and spend on the island (per person per day) has dropped from \$126 (2012-2013 average) to \$105 (Oct-Dec 2013) but is up from the previous quarter (Jul-Sep) for 2013 (\$102).

Overall the Cook Islands sector is performing well but it remains important to look at ways to increase visitor yield in a sustainable manner that enhances local economic linkages.

Appendix – Cook Islands Visitor Survey



Cook Islands Visitor Survey

Information for Participants

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

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

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

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