

Cook Islands Visitor Survey Results

October - December 2012

Prepared for the 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 on-going online departure survey. The survey period covered in this report is 1 October 2012 to 31 December 2012. There were 494 individual respondents to the survey - representing a total of 999 adults and an additional 99 children (this equates to 8% of all visitors during the period – based on 2011 visitor arrival data).

The survey results for this quarter are very similar to the survey results of the previous March-June/July-September 2012 quarters. The consistency in the responses over three quarters is an indication of the robustness of the dataset. There is some variation in spend figures in the Cook Islands (but not in the prepaid figures) in the third quarter compared to the previous two quarters.

Almost two thirds (65%) of the surveyed visitors come from New Zealand, 22% come from Australia. Visitors are generally well educated (65% of visitors have some form of tertiary education) and have a higher than average annual household income (45% earn over NZ\$100,000 per year). Nearly half (49%) of visitors travel with just one companion. Solo travellers are relatively rare (6%).

Over half of 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 (73%). The average length of stay in the Cook Islands is 8.7 nights. The majority of the visitors (93%) stay either one or two weeks. Virtually all visitors surveyed (98%) visit Rarotonga, 22% visit Aitutaki, only 3% visit another island.

On average, visitors to the Cook Islands spend NZ\$1,990 per person prior to arrival (NZ\$2,042 during the previous quarter). Of this, 40% (\$796, or \$91 per day) is estimated to flow to the Cook Islands.

While in the Cook Islands, the total local spend per visitor per day is \$109 (down from \$144 during the previous quarter), and the average local spend per visitor during the whole trip is \$948. If the prepaid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,744 to the Cook Islands economy (or \$200 per day). The cause of the decline in 'in-country' spend requires further investigation but may reflect seasonal pricing shifts and also changes in the visitor profile. The smaller sample size in Quarter 3 may well have had some impact.

Visitor satisfaction with activities and services is generally high. Land-based activities are characterised by the strongest participation levels; cultural activities are characterised by the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are considered to be the friendly people, the unspoilt environment and the peacefulness of the destination. The least appealing elements of the Cook Islands experience are considered to be the poor quality and value for money of tourism services such as accommodation and rental cars, quality and frequency of public transport, the inconvenient flight times, the presence of rubbish on beaches and the numerous stray dogs.

Overall satisfaction on the part of tourists is very high: nearly all (94%) of the visitors surveyed want to return to the Cook Islands and 98% would recommend the Cook Islands to friends or family.

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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 is currently running on a quarterly basis.

This report presents the results from the October to December 2012 period. Over this three month period, 2461 visitors were contacted by email to take part in the survey, and 494 responses were received: a conversion rate of 20%. These responses cover a total of 999 adults and 99 children. The conversion rate for this quarter is lower than for the previous two quarters of 43% and 40% (1st and 2nd quarter respectively) and the number of responses for the previous quarters were also significantly higher (1551 and 1275 responses). Visitors who spent more than 30 nights in the Cook Islands are excluded from the analysis.

The data presented detailed information on:

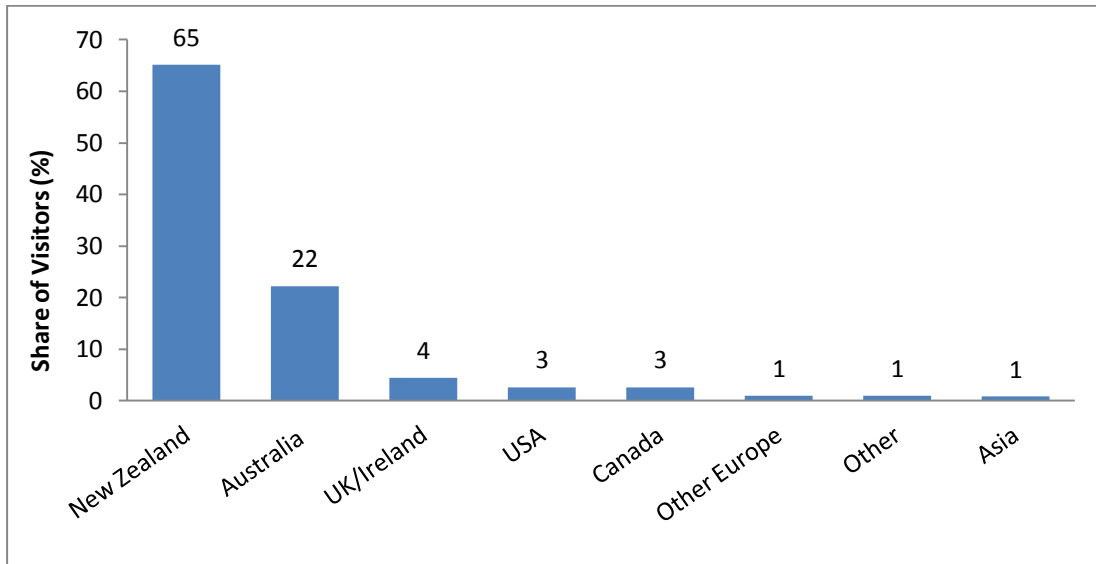
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook 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 previous quarters some comparison is made, otherwise only data for October-December 2012 is discussed. Comparisons across the four quarters will be provided in the next report in this series.

Visitor Characteristics

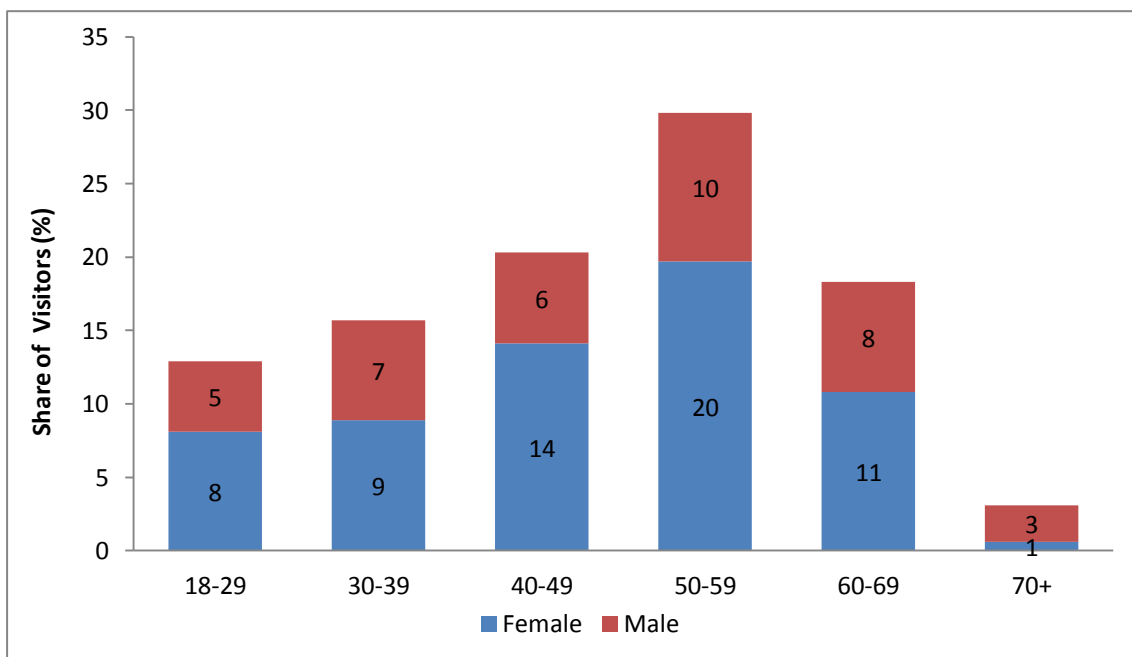
The majority of the visitors surveyed (65%) come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 22% of respondents. Canada, Europe, Great Britain and the USA are the other key source markets.

Figure 1: Country of Origin (n=490)



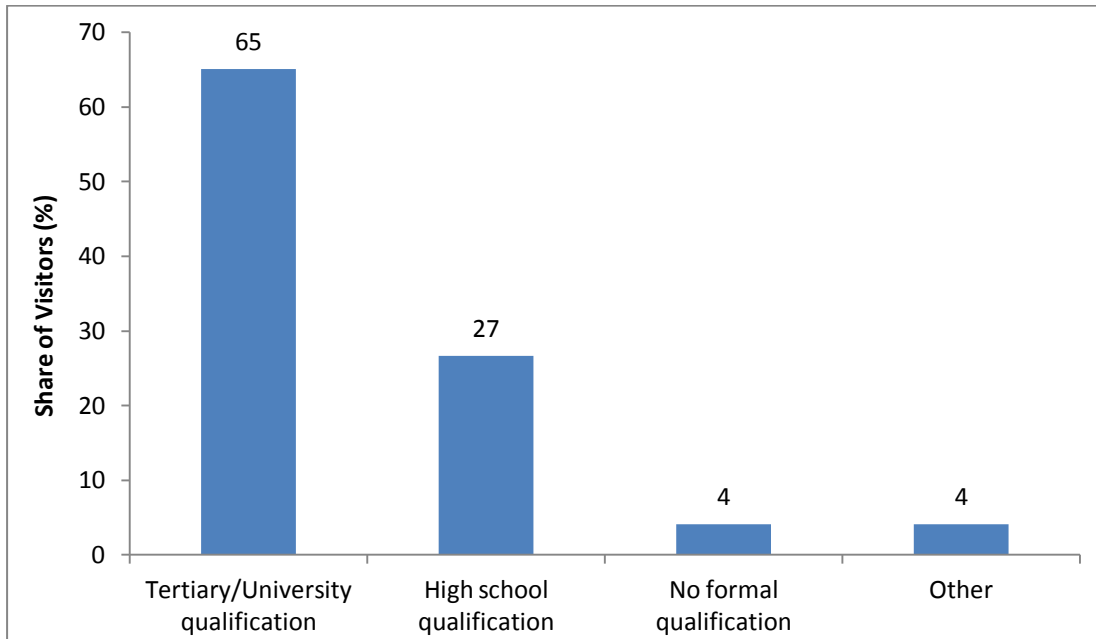
More women (62%) than men (38%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented, followed by the 40 to 49 and 60 to 69 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=483)



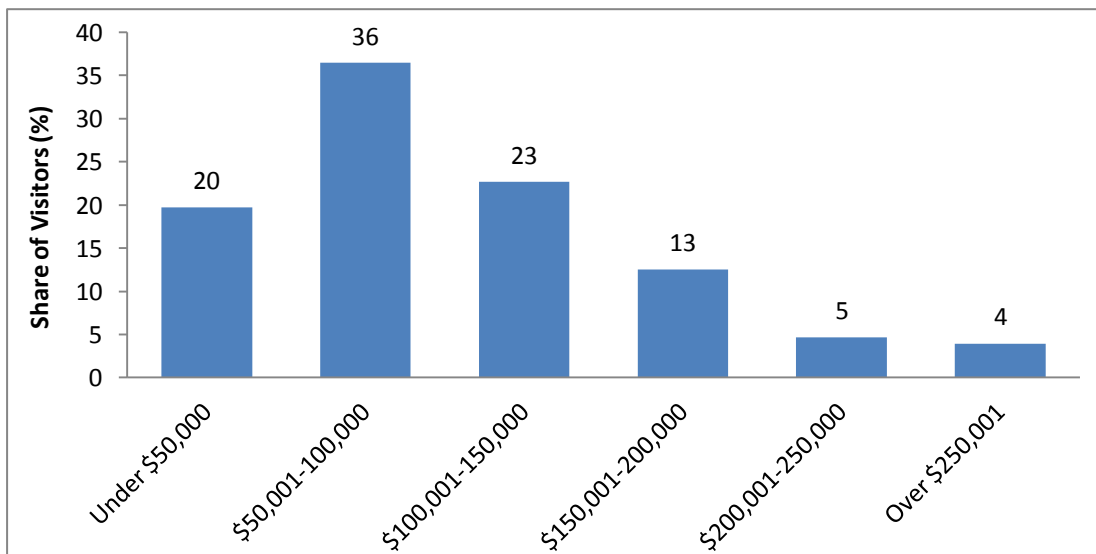
Visitors are well educated. Around two out of three visitors surveyed had some form of tertiary qualification (Figure 3), and a further 27% finished their education after completing high school.

Figure 3: Highest Qualification (n=484)



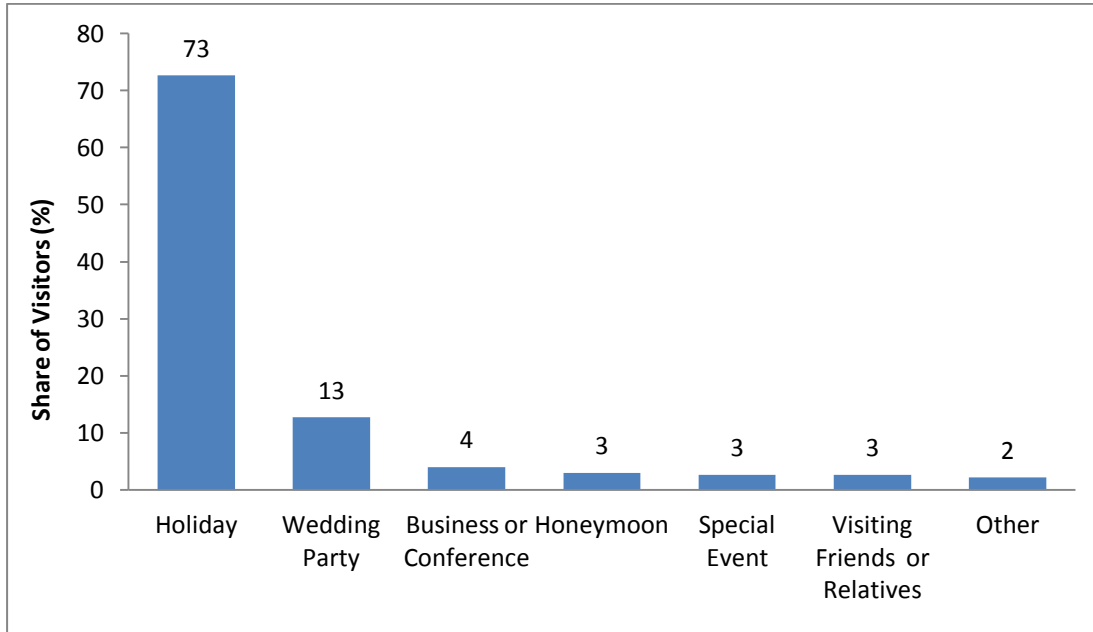
Just over one third of visitors (36%) have an annual household income of between NZ\$50,001 and \$100,000. A further 23% earn between NZ\$100,001 and NZ\$150,000 (Figure 4). Nearly one quarter (22%) of the respondents have a household income of over NZ\$150,000 per year. Visitors to the Cook Islands earn significantly more money than the average New Zealander or Australian (latest national statistics show a median household income of NZ\$67,808/NZ\$79,300).

Figure 4: Annual Household Income in NZD (n=406)



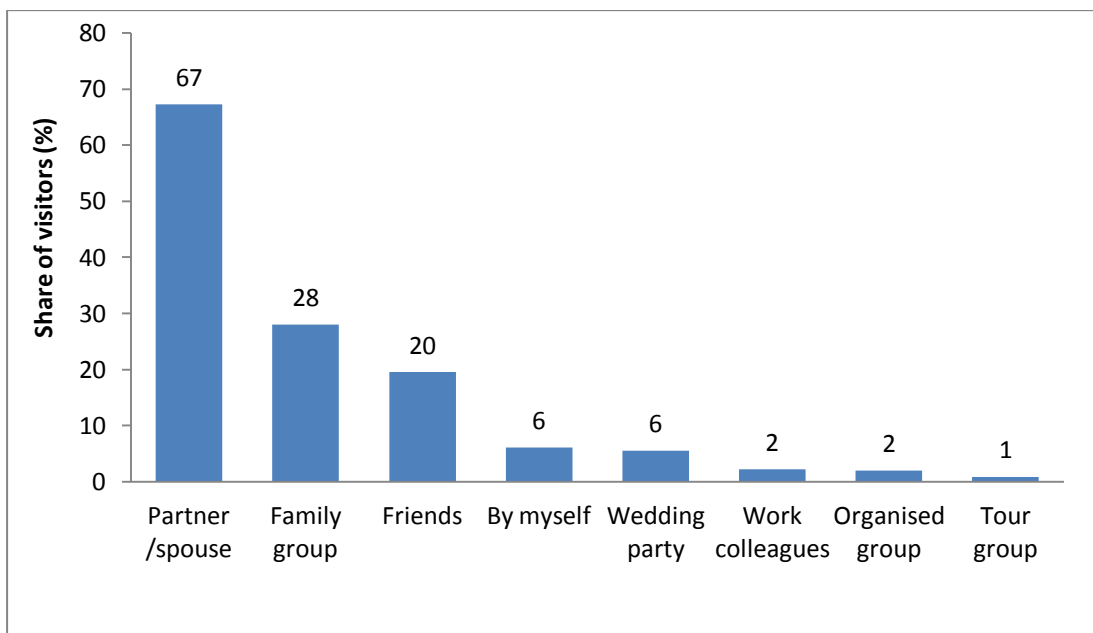
The majority of visitors surveyed from October to December 2012 come to the Cook Islands for a holiday (73%), with the second major purpose of visit being to attend a wedding (13%). Just 4% of respondents came on business/conference travel, and 3% visited friends or relatives (Figure 5).

Figure 5: Main Purpose of Visit (n=494)



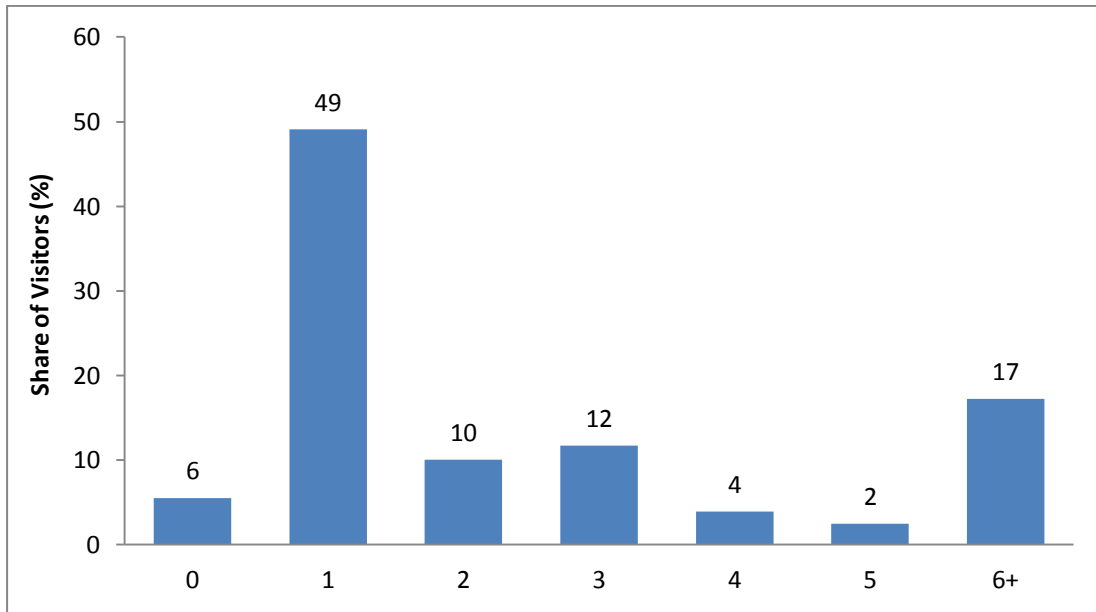
Just over two thirds of the visitors (67%) travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (28%) or friends (20%). Those travelling alone, with a wedding party, with colleagues or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with who? (n=492)



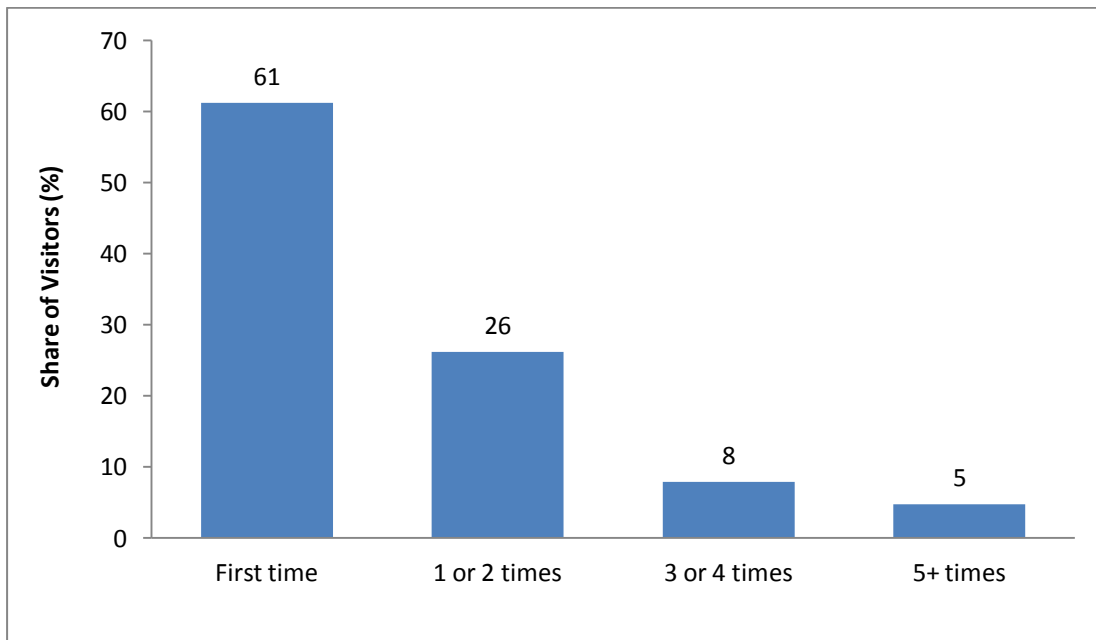
Most visitors travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=487)



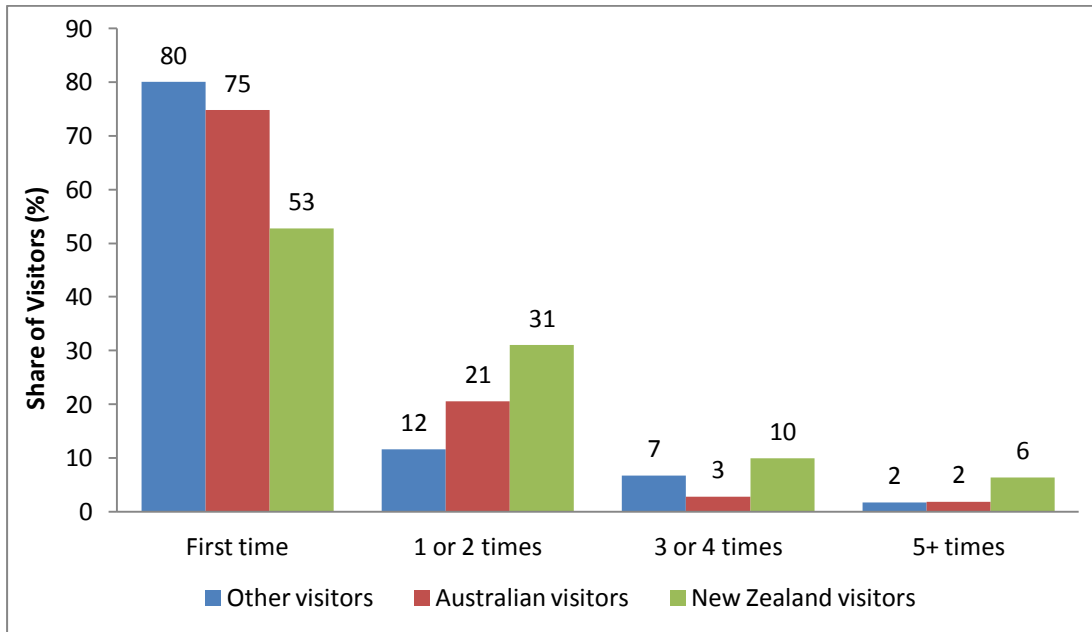
Most visitors (61%) are on their first visit to the Cook Islands. A further 26% have been to the Cook Islands once or twice before. A smaller percentage (13%) has visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=482)



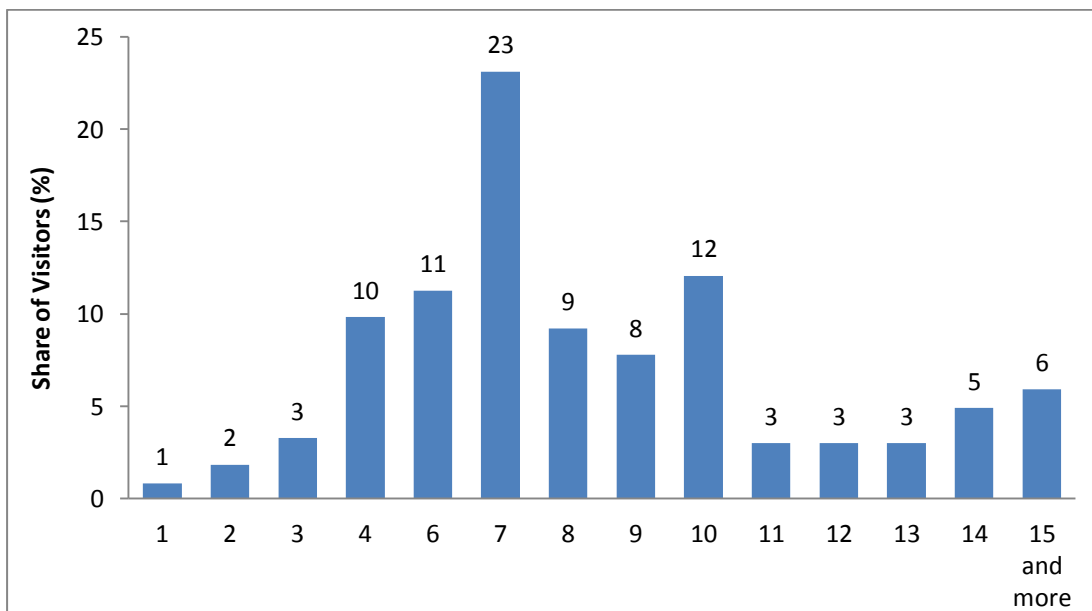
New Zealand visitors are more likely to be repeat visitors than those from other source markets (Figure 9). Nearly one third on New Zealanders have visited one or two times before compared to 21% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=480)



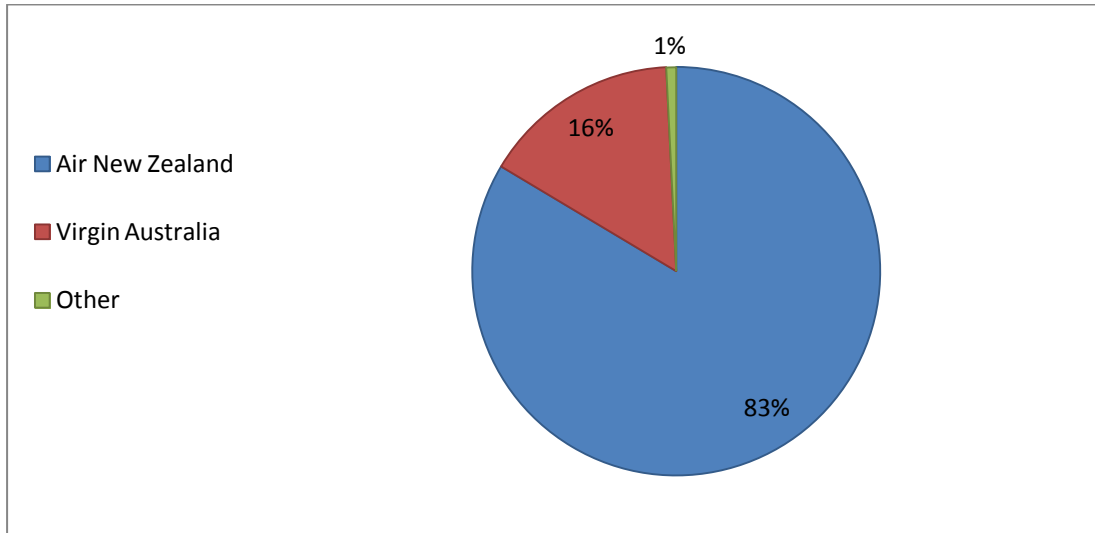
The average length of stay in the Cook Islands is 8.7 nights with 50% of visitors spending 1 to 7 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=489)



Most visitors surveyed (83%) travel to/from the Cook Islands with Air New Zealand while 16% 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 by private charter plane.

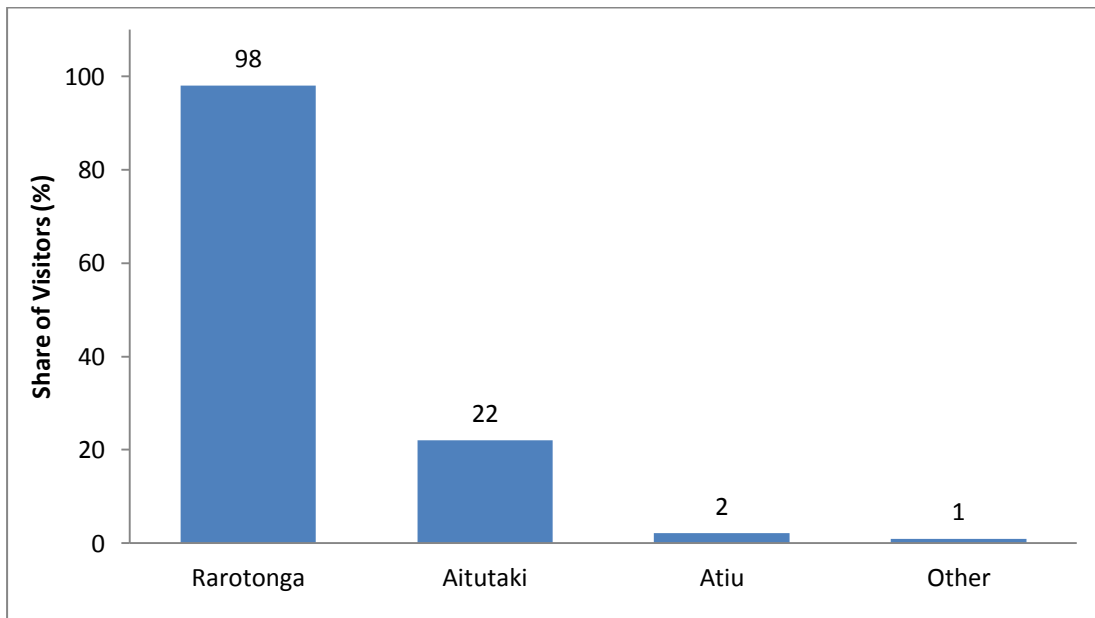
Figure 11: Airline used (n=488)



For 89% of visitors, the Cook Islands is the only destination on their trip. For 11% of visitors the Cook Islands is part of a larger journey such as an around-the-world trip.

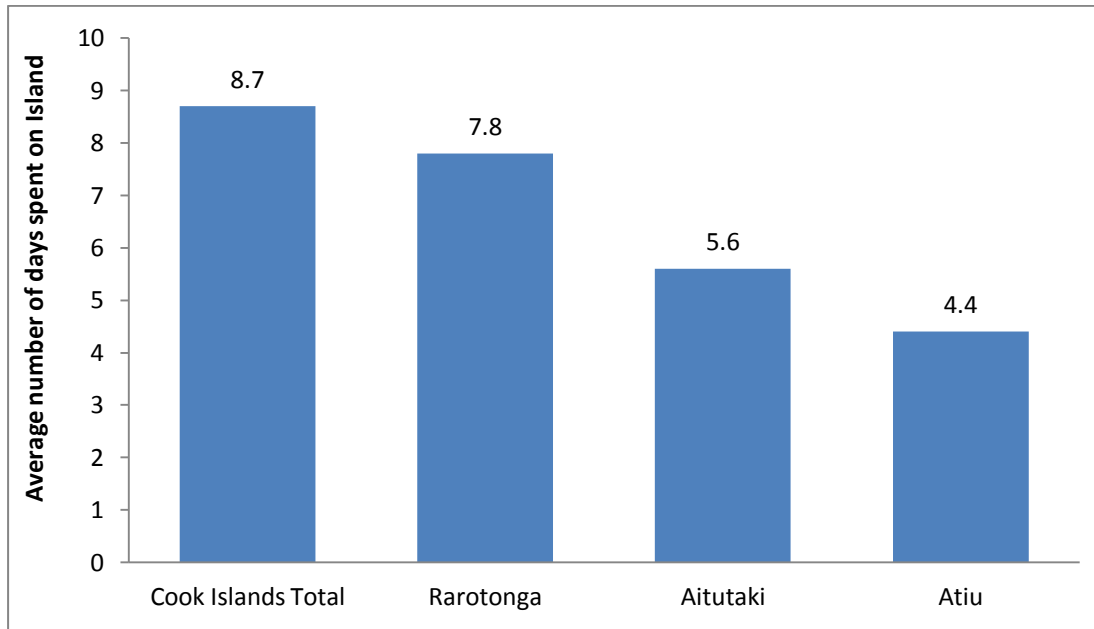
Almost all visitors (98%) to the Cook Islands spend some time in Rarotonga, while Aitutaki is the second most visited island (22%) (Figure 12). The other islands receive very few visitors.

Figure 12: Visited Islands (n=494)



The average length of stay on Rarotonga is 7.8 days (Figure 13). For the visitors that went to Aitutaki, the average number of days spent on the island is 5.6 days. The average amount of days spent on Atiu is 4.4 days.

Figure 13: Average length of stay in the Cook Islands (n=494)

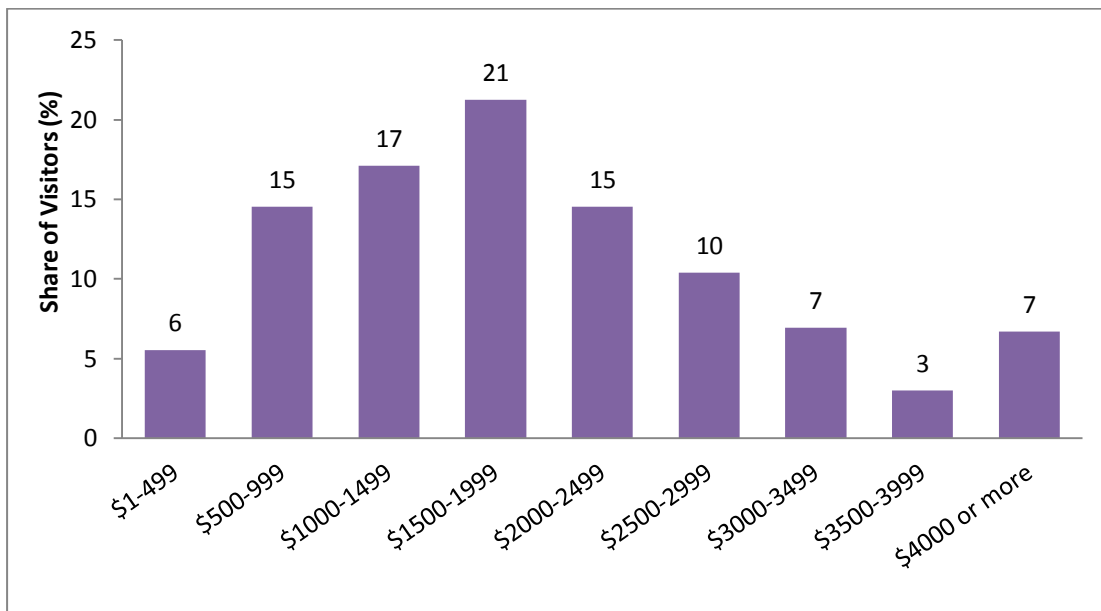


Visitor Expenditure

The survey asked a range of questions about visitor expenditure, both prior to arrival and also while in the Cook Islands. All the figures below are based on respondent estimates of their own spending and anyone else they chose to include (e.g. spouse and children). The following expenditure section is based on the number of adults and children that respondents included in their cost estimates - a total of 1098 people comprising 999 adults and 99 children.

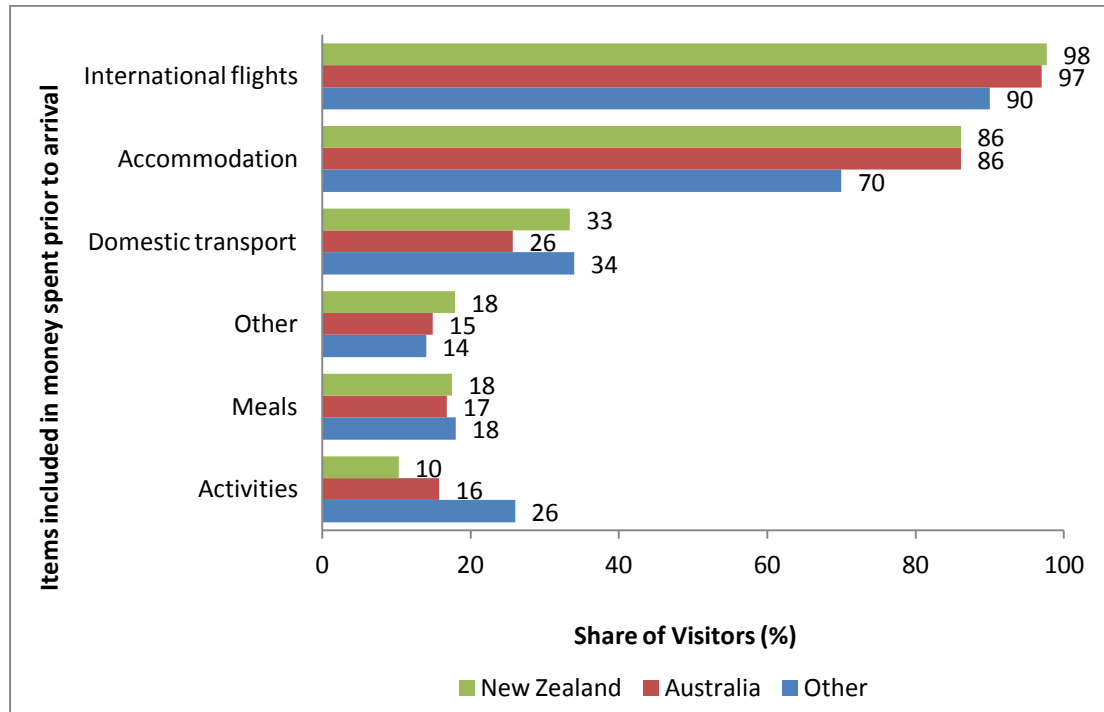
On average, visitors to the Cook Islands spend NZ\$1,990 per person prior to arrival. Almost all visitors (94%) spend at least \$500 per person prior to their trip since they have to pay for their international flights (Figure 14 and Figure 15).

Figure 14: Amount of money spent per person prior to arrival (n=433)



Spending prior to arrival often includes accommodation: in 86% of the cases for New Zealand and Australian visitors, and for 70% 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=453)



It is very difficult to accurately estimate 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 estimate that the prepaid spend figure per day, excluding flights, is \$91 and for the average visit is \$796.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$109 (Table 1). This figure is considerably lower than the previous quarter (\$144). Most money spent locally is on restaurants, cafes and bars (30%), accommodation (23%), shopping (15%), and groceries (8%). When daily spend is multiplied by the average stay (8.7 days) it is evident that each visitor spends on average \$948.

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 (109\$ plus \$91), or \$1,744 (\$948 + \$796) per total personal visit.

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

Expenditure Items	Overall n=486	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	33	30
Accommodation	25	23
Shopping	16	15
Groceries	9	8
Vehicle rental	8	7
Activities	8	7
Domestic flights	3	3
Other	3	3
Petrol	2	2
Cruising	2	2
Public transportation	1	1
Total expenditure per person per day	\$109	100%

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

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

Expenditure Items	n=18	n=107	n=313	n=35
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	32	34	34	17
Accommodation	47	20	23	23
Shopping	20	21	15	9
Groceries	9	7	9	7
Vehicle rental	3	8	9	4
Activities	9	8	8	6
Domestic flights	5	3	3	3
Other	6	3	3	1
Petrol	2	2	2	1
Cruising	3	2	2	0
Public transportation	2	1	1	1
Total spend (NZ\$)	\$139	\$109	\$109	\$72

While the sample sizes for some groups are very small there are some important points to highlight and to review again when the next report is completed. Australian spend (\$109) was considerably lower than in the 1st (\$164) and 2nd (\$151) quarters. European visitor spend at \$72 per person per day was down considerably from \$129 and \$132 (1st and 2nd quarter respectively). USA/Canada spend was more consistent with \$139 per visitor per day in the 3rd quarter compared to \$147 (1st) and \$148 (2nd quarter). New Zealanders also spent more in the previous two quarters with \$130 in the 1st quarter and \$136 in the 2nd quarter – compared to \$109 per visitor per day for the October-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). Just over two thirds (67%) of the visitors surveyed ranked their experience as 'very satisfied'. Very few visitors (1%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=485)

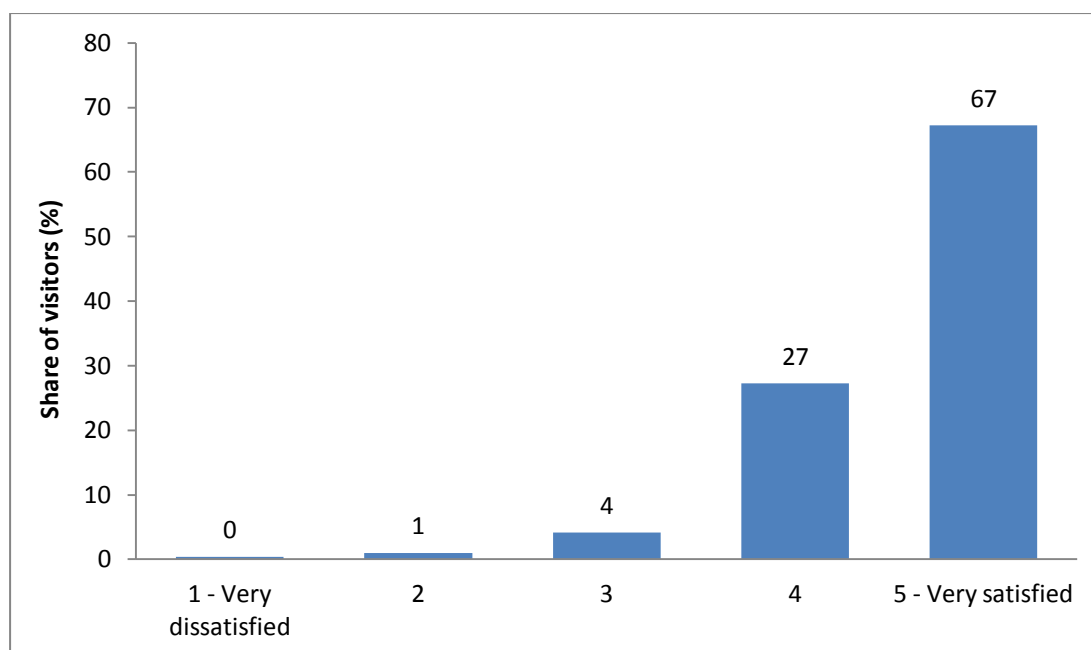


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (86%) visit a local market, and 66% 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 4.7/5) followed by water based activities (4.6/5), land-based activities (4.5/5), and shopping (4.3/5). It should be noted that some activities e.g. bonefishing and kitesurfing have very low 'n' values.

Figure 17: Degree of participation in activities (n range=8-483)

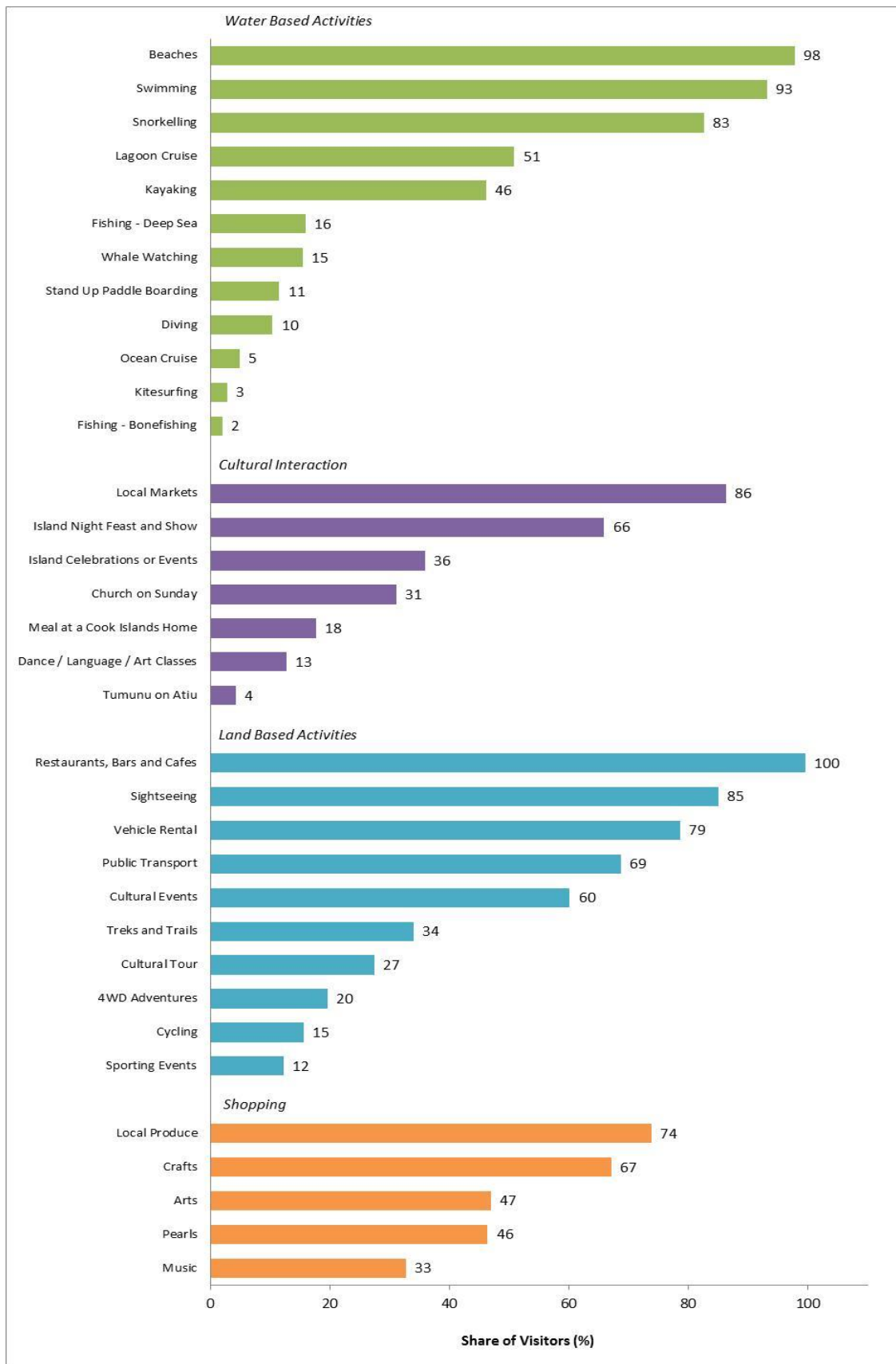
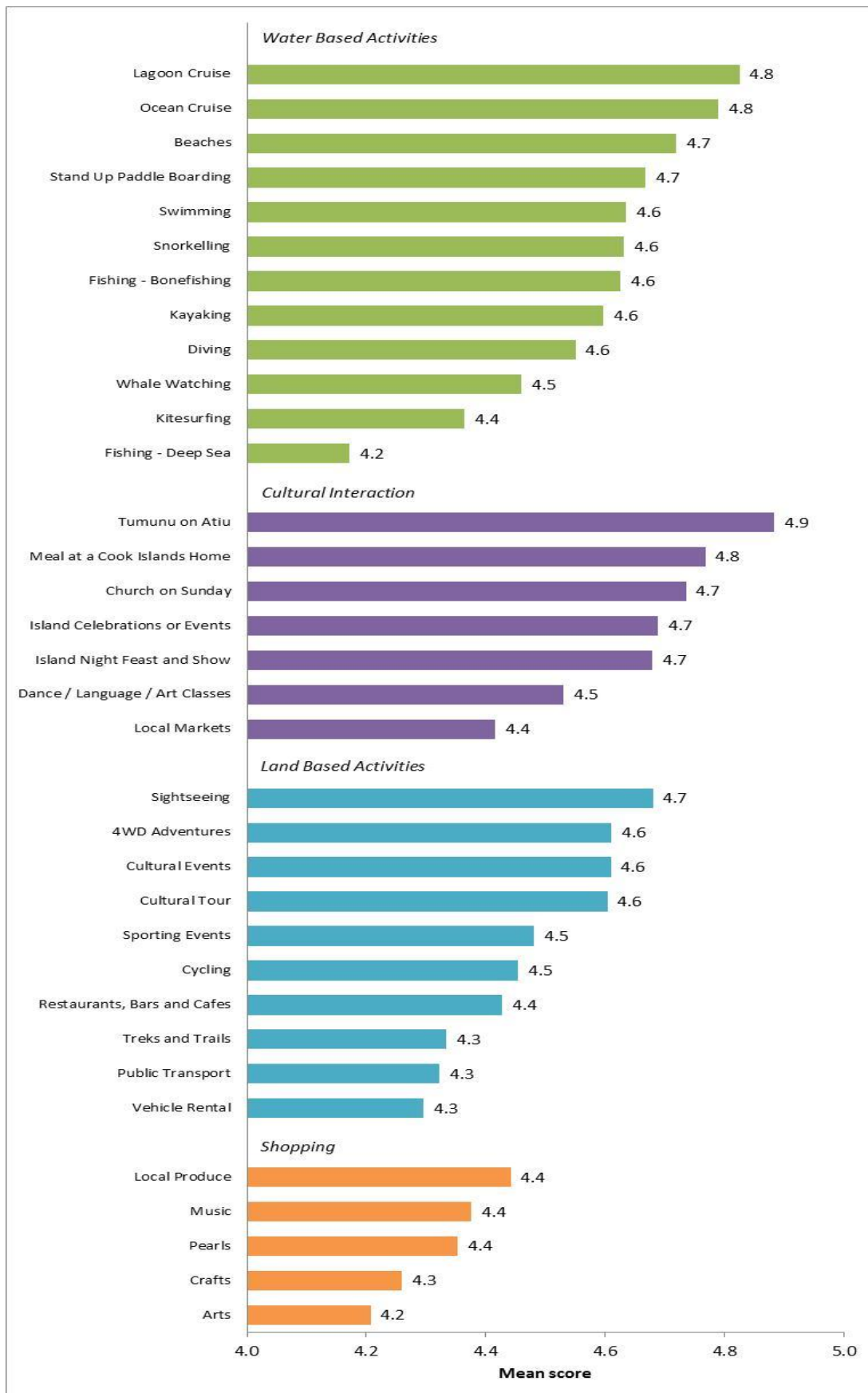
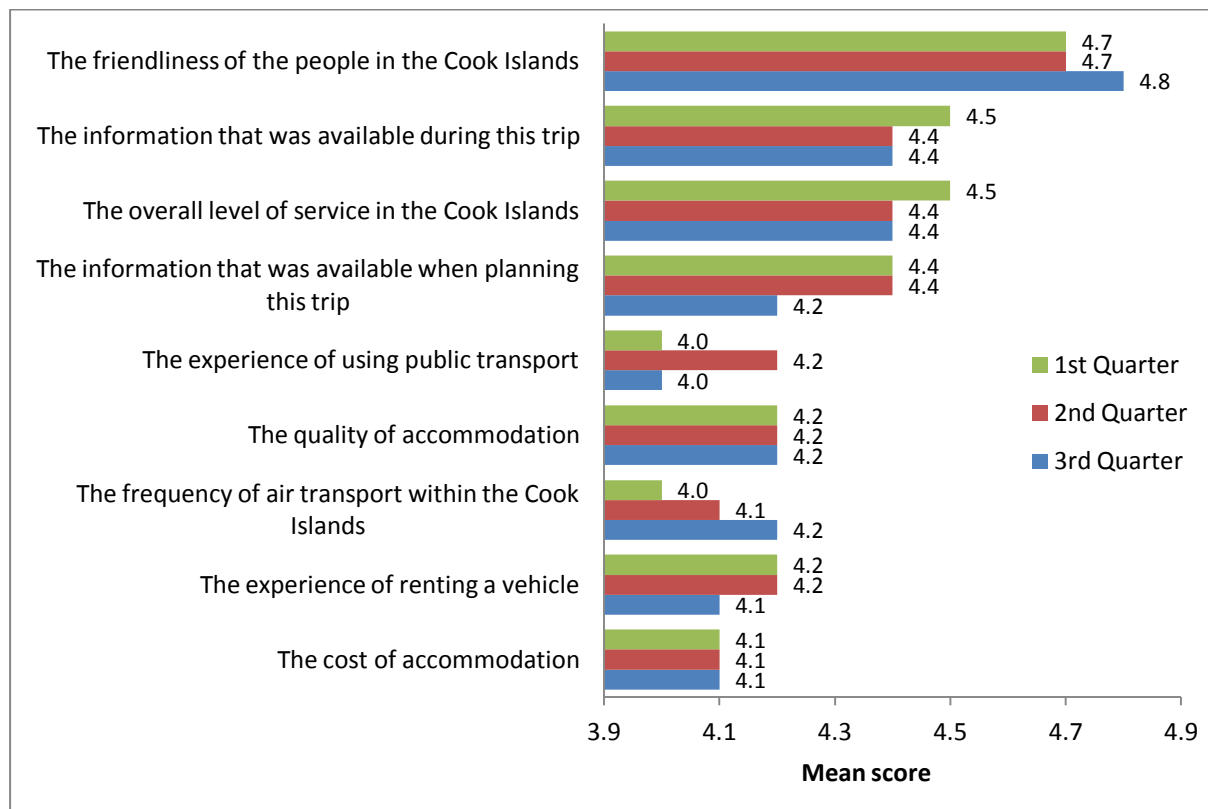


Figure 18: Degree of satisfaction in activities (mean score out of 5)



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 first, second and third quarter are compared 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 three Quarters.

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



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 friendly local people and their culture, the beautiful natural environment, and the peacefulness and relaxing atmosphere of the islands. Activities and entertainment are less likely to be mentioned, and even less so the services.

Table 3: Most appealing aspects of the Cook Islands (n=474)

Theme	Share of respondents (%)
Friendly people	50%
Environment	44%
Peaceful destination	32%
Activities and entertainment	22%
Services	20%
Visitor-friendly destination	10%
Overall good experience	5%

* 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%.

Friendly people

Half (50%) of visitors 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 and hospitality of the local people in the Cook Islands, as well the lifestyle and culture. Key words that predominated in the responses included “friendly”, “welcoming”, “helpful” and “warm”. Comments included:

"The people were so friendly and just so helpful!"

"The people were amazing, and the culture was so great to be immersed in."

"The completely relaxed laid back feel and welcome as if you are one of the family by the locals."

Environment

Nearly half (44%) of the respondents consider the environment to be the most appealing aspect of their Cook Island’s experience. Most comments that were made focused on the beauty and the cleanliness of beaches and lagoons, the good climate and the unspoilt mountains. Comments included:

"Swimming in the lovely blue clear water, the restfulness of the environment."

"Amazing beaches and lagoon on Aitutaki, one of the most beautiful places on Earth."

"The nature was very beautiful and everything is really unspoilt!"

Peaceful destination

Just under a third of survey respondents appreciated the relaxed atmosphere of the Cook Islands. They considered the Cook Islands to be a very “relaxed”, “peaceful”, and “tranquil” destination. Respondents underlined the islands as being a “perfect spot” for relaxing and feeling “totally refreshed”, as well as having a “relaxed vibe” and “calmness”. Another point worth noting is the respondent’s view of the Cook Islands being a place that is “not over-commercialised” or “over developed”. Many visitors also emphasise the importance of preserving the destination from mass tourism development in the future and keeping the relaxed pace and atmosphere. Comments included:

"The relaxed vibe from the moment you step off the plane!"

"I like that the Cooks have not been spoiled by over development or poor development."

"The relaxed approach and calmness to life, tranquil setting, a real holiday experience, a place to totally refresh."

Activities and entertainment

Activities and entertainment was mentioned by 22% of respondents. 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 island performances. Comments included:

"Captain Tama's Cruise was awesome. The cultural show fantastic. The history lessons of the island awe inspiring."

"The Vaka Lagoon Cruise was quite possibly the most amazing thing I've ever experienced."

"Cross-island trek was the highlight."

Services

One fifth of visitors (20%) commented on the services (and service) they encountered while in the Cook Islands as being an appealing feature of their trip. Some positive comments identified the quality and range of cuisine, staff in the restaurants/bars/hotels and tour operations being helpful and going beyond expectations, and the friendliness and service provided by the local police. Comments included:

"Plenty of restaurants, providing many different choices of cuisine."

"The locals - all so friendly and hospitable. The tour operators - all very helpful. Staff at the hotel were fantastic."

Overall good experience

A small number (5%) of respondents could not identify a specific appealing dimension of their trip to the Cook Islands and instead stated that their whole experience of the Cook Islands was a good one. Positive adjectives used to describe their experience included “fabulous”, “amazing” and “beautiful”. Comments included:

"Everything! the island, the sea, the beach, the people, the markets, the cultural festival celebrating your constitution."

"We could not have asked for more."

"This our fifth time to the Cook Islands, and we love the place!!!!!!"

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?"* Almost a quarter (22%) of visitors noted they found nothing to be 'least appealing' or that there was 'nothing to complain about', responding with comments such as *"Nothing, we loved everything"* and *"No negative vibes at all"* (Table 4). There were, however, a number of areas that did attract comment, especially tourism services.

Table 4: Least appealing aspects of the Cook Islands (n=440)

Themes	Share of respondents (%)
Tourism services	26%
Nothing to complain about	22%
Services and facilities	20%
Other comments	18%
Price of goods and services	15%
Rubbish & natural environment care	10%
Flight-related issues	5%
Having to leave	4%
Safety & poverty	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%.

Tourism services

The most highlighted theme by visitors (26%) as the least appealing aspect of the Cook Islands was the poor quality or lack of tourism services. Some of the comments highlighted poor customer care skills and lack of professionalism amongst staff members, including *"rudeness"*, *"lack of enthusiasm"*, *"tiredness"* and *"undermining of other staff"*. There was mention of accommodation facilities and the level of quality/value for money (or lack of) in hotels and resorts. The lack of local cuisine available to tourists and the high prices in resorts for meals were also mentioned. The high cost of internet access was also raised. Rental cars, scooters and bicycles were also mentioned by visitors as being an unappealing factor of their trip with terms such as: *"un-roadworthy"*, *"very rusty"* and *"in need of repair"* being used. Comments included:

"Accommodation was not good enough. 20 watt light bulbs, grubby rooms and inadequate hot water don't do it for us. We travel a lot internationally and expect better."

"Breakfast at the resorts was pretty average compared to other resorts in the Pacific Islands where breakfast is excellent."

"There was only one bad thing, a cafe experience in town... The staff were fantastic, however the owners visited and constantly undermined and criticised the staff in front of customers. I wouldn't go there again if the owners were there; it's a shame as the staff were great."

"our poor rental car, which was almost falling apart."

Public services and facilities

One fifth of the survey respondents (20%) expressed their disappointment about public services and infrastructure in the Cook Islands. In particular complaints were made about the quality and frequency of public transport, availability and costs of taxi services, range and opening hours of retail shops (as well as the service provided within the retail stores), along with poor cell phone and internet services. Comments included:

"The bus was too full to pick us up from the bungalow to take us to the airport."

"Did find it hard to find cafe and shops open after 4pm."

"Generally slow internet service."

"That 3G wasn't yet available on the prepaid sim-cards."

High price of goods and services

A number (15%) of visitors made specific comments about the high prices of food and beverage, souvenirs, handicrafts, hotel accommodation, activities and the internet. Respondents mentioned that the Cook Islands was an expensive destination to visit, but did not always provide good value for money. Many respondents expressed dissatisfaction with the departure tax and the car licence costs, describing them as *"inconvenient"*, *"greedy"* and *"large"*. Comments included:

"Departure tax (please include it in to the ticket price like everyone else!)"

"Scooter hire shop openly ripped us off."

"Costs for most things are very high and on a par with mainland prices...Lack of local fruit and veg at good prices."

"In Rarotonga prices kept changing daily, or was it because we were tourist?"

Rubbish and natural environment care

One in ten visitors (10%) made mention of rubbish and the lack of care of the natural environment in the Cook Islands as unappealing factors influencing their trip. Rubbish on the beach, dirty streets and waste/rubbish in drains were often commented upon. 'Burn offs' of foliage and rubbish were also criticized from time to time. The lack of knowledge about conservation and the poor condition of the lagoons, reefs and marine life, seemed also to be of concern to a small group of visitors. Comments included:

"Constant rubbish and foliage burn offs."

"Disappointing to see Muri lagoon succumbing to algae."

"Lots of rubbish around local houses which made its way on to the beach."

Flight-related issues

Five percent of visitors made comments on flight related issues. These mainly focused on the scheduled arrival and departure of flights and the availability (as well as cost) of domestic transfers between islands. Comments included:

"Flight tickets not flexible enough and too expensive (no island hopper ticket available)."

"Getting there. A direct flight from Christchurch would help. You loose 2 days in travel!"

"Lack of advice or help with information on how to organise flights to outer islands and luggage limits."

"Time that flights arrive meaning you have to pay for an extra night's accommodation."

Other comments

Eighteen percent of respondents provided 'other' non-categorised comments. Some of these comments relate to factors over which the industry has limited control (e.g. the weather/climate, mosquitos, crowing roosters and poor luck when fishing), others are controllable (e.g. wandering dogs). Comments included:

"We had a little more rain than we would have liked - but even the delightful people can't change the weather!!"

"Didn't enjoy the wandering dogs a right pain when enjoying the beach., the chooks and roosters in full song each night got to be an annoyance. "

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 focused on services and infrastructure (24%), accommodation (19%), food quality and prices (13%), as well as flights (11%). Some respondent's comments on these themes included:

"Communication technology by implementing cheap international calling facilities."

"More information ahead of the visit. Poor booking procedures on line, with poor communication between hotel and booking agency."

"More user friendly flight times. Why so many middle of the night flights?"

Reasons to return to the Cook Islands and recommend to others

The great majority of visitors (95%) indicated that they would consider re-visiting the Cook Islands. It is apparent that most visitors' reasons for returning included 'overall-great holiday experience', the 'atmosphere', the 'environment and climate', and 'local people'. These four themes cover the majority of responses.

Those who mentioned that they had an overall great experience (41%), mentioned that they *"loved it", "have booked to come back", "it's paradise", "such a special place" and "I recommend Rarotonga to everyone"*. Comments included:

"It's the closest place to paradise we have been to. It's special as we got married there a year before that."

"Beautiful place and have already booked to come back in July 2013."

Atmosphere was mentioned by 38% of visitors as being a factor for returning to the Cook Islands, they viewed the Cook Islands as being *"relaxing", "peaceful"*, and they also stated they enjoyed the *"lifestyle"* of the Cook Islands.:

"Loved it, very relaxing place to go."

"We enjoy the island lifestyle and it was a good way to unwind and avoid jetlag after being in the USA for 6 weeks."

Just over a third of visitors mentioned that the environment and climate were reasons for returning to the Cook Islands. Responses included comments such as:

"Beautiful weather and scenery."

"I love the warm weather, beautiful beaches..."

Just under a third of respondents mentioned that local people were what made them want to return to the Cook Islands. Local people were said to be *"amazing", "friendly" and "helpful"* towards tourists. Some comments included:

"High standard of great hospitality from the locals."

"Smiling locals."

Those few respondents (n=23) who said they would not be returning to the Cook Islands, gave reasons such as: 'there are other places to go to', the Cook Islands are too 'expensive' and the Cook Islands are simply 'too far away'. Other reasons for not returning included 'not enough to do/not enough culture', 'weather', 'other/still unsure', 'accommodation', 'service', 'flights' and 'food and beverage'.

Over three-quarters (82%) of the visitors who said they would like to return would also like to include the outer islands to their next visit. This figure is slightly (though not significantly) higher than the previous two quarters that we have reported on (79% and 78%)

The majority of visitors (71%) surveyed between October and December mentioned they would like to include Aitutaki in their visit. 'Atiu' was the second most mentioned island at 11%; 5% of visitors mentioned they would like to visit 'all the islands', 3% would like to include 'Mangaia'. 'Mauke' was mentioned by 2% of visitors. Seventeen percent of visitors stated that they were 'not sure' or 'needed more information' before making a decision on which islands to include.

Nearly all visitors surveyed (98%) said that they would recommend the destination to their family and friends. Forty-four percent of visitors mentioned they would recommend the Cook Islands because of the 'atmosphere'; generally this was the 'relaxing' and 'peaceful' atmosphere that visitors experienced while in the Cook Islands. Visitors felt that the Cook Islands was a great place to 'get away', 'unwind' and 'relax' and therefore thought it made a great holiday destination for those who needed this kind of holiday experience.

Thirty-four percent of respondents stated that the 'environment' of the Cook Islands was a reason for recommending the Cook Islands to others – including beaches, cleanliness, clear waters, climate and temperature. Thirty-two percent of respondents saw the Cook Islands as an 'overall great place', 30% mentioned the 'friendly and helpful local people', and 12% would recommend the Cook Islands because of the convenience of getting to the islands and the easiness of the trip. Both 'culture' and 'attractions and activities' were mentioned as reasons to recommend the Cook Islands to others by 10% of visitors, and 'affordability' was mentioned by a further 9%.

Final observations

This report shows that in many ways the Cook Islands tourism industry performed well during the October - December 2012 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 the previous quarterly reports, this research highlights issues around environmental degradation and infrastructure provision that should be monitored and managed carefully. There are also some concerns for nearly a quarter of visitors around the value for money/quality of service provided by accommodation and food/beverage operations.

While visitor spend prior to arrival in the Cook islands has remained fairly constant with previous quarters, spend on the island (per person per day) has dropped from \$144 (July-September) to \$109 (October-December). While the smaller sample size has certainly had some impact on our ability to analyse smaller market segments with confidence, we feel that other factors (visitor characteristics, seasonal changes in price structures) may have played a role here and this will be explored further as we complete the 4th Quarter report and provide a review of the entire year of research. Certainly the report highlights the need to bolster email gathering and response rates as much as possible as we move towards completing the full year of data collection.

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.

All answers are confidential and can in no way be linked to your personal details. By taking the survey you are giving your consent to be part of this research.

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 30 September 2012.

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 mid 2012.

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, eg. 26/06/2012)

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?

- Holiday
- Wedding party
- Business or conference
- Visiting friends or relatives
- Honeymoon
- Special event - sporting
- Special event - cultural
- Volunteering
- Education

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

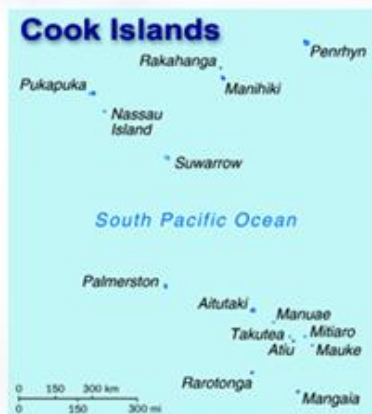
- Airline - Air New Zealand
- Airline - Virgin Australia
- Airline - Air Tahiti
- Ferry
- Private charter plane
- Private boat

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

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

6. How many people accompanied you on this trip?

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



- Rarotonga
- Aitutaki
- Atiu
- Mangaia
- Mauke
- Other

7.2 How many nights did you spend on each island?

	Number of nights
Rarotonga	<input type="text"/> ▾
Aitutaki	<input type="text"/> ▾
Atiu	<input type="text"/> ▾
Mangaia	<input type="text"/> ▾
Mauke	<input type="text"/> ▾

7.3 Please select the accommodation(s) you stayed in on Rarotonga? (Hold down the CTL key to choose more than one accommodation)

- Aito Apartments Muri
- Aloha Mana
- Anchor's Rest
- Apartments Kakera - Rarotonga
- Aquarius Rarotonga
- Arcadia Cottage
- Are Mango Guesthouse
- Are Renga
- Aremango Guesthouse
- Aroa Beachside Inn

How satisfied were you with your stay at Aito Apartments Muri?

Very Dissatisfied (1) 2 3 4 Very Satisfied (5)

8. On your most recent visit to the Cook Islands, please indicate below the activities that you engaged in and how satisfied you were with your experience.

• Water based activities:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Beaches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Swimming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Snorkelling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kayaking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing - Deep Sea	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fishing - Bonefishing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lagoon Cruise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ocean Cruise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Whale Watching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kitesurfing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stand Up Paddle Boarding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

• Cultural interaction:						
	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Island Night Feast and Show	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meal at a Cook Islands Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Church on Sunday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Island Celebrations or Events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tumunu on Atiu	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dance / Language / Art Classes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

• Land based activities and Touring:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Restaurants, Bars and Cafes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural Events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sporting Events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4WD Adventures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cultural Tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Treks and Trails	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cycling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sightseeing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vehicle Rental	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Transport	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

• Shopping:

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
Pearls	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crafts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local Produce e.g. Coffee, Coconut Oil etc	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

• Please tell us about any other activities you participated in

9. On your most recent visit, how satisfied were you with the following?

	Very Dissatisfied (1)	2	3	4	Very Satisfied (5)	Didn't participate
The information that was available when planning this trip?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The information that was available during this trip?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The cost of accommodation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of accommodation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The experience of renting a vehicle?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The experience of using public transport?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The frequency of air transport within the Cook Islands?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The overall level of service in the Cook Islands?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The friendliness of the people in the Cook Islands?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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?

No

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 in Question 14.2

14.2 Please select your currency:

NZD

AUD

GBP

USD

EUR

CAD

Other - please specify

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

International flights

Accommodation

Meals

Domestic transport

Activities

Other

15. After you arrived in the Cook Islands, how much do you estimate that you spent in each island in local currency (NZ\$)?

	Rarotonga	Aitutaki	Other island(s)	Total
Accommodation	0	0	0	0
Restaurants, Cafes & Bars	0	0	0	0
Vehicle Rental	0	0	0	0
Petrol	0	0	0	0
Domestic flights	0	0	0	0
Public transport	0	0	0	0
Cruising	0	0	0	0
Groceries	0	0	0	0
Shopping (e.g. souvenirs, clothes)	0	0	0	0
Activities (e.g. water sports, sightseeing)	0	0	0	0
Other	0	0	0	0

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

Yes

No

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

Yes

No

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

Yes

No

19. How satisfied were you with your overall experience of the Cook Islands ?

Very Dissatisfied

(1)

2

3

4

Very satisfied

(5)

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:

- 18-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70+

23. Your gender:

- Female
- Male

24. What is your highest qualification?

- No formal qualification
- High school qualification
- Tertiary/University qualification
- Other

25.1 What is your approximate annual household income in your home currency?
Please use the following format: eg. 50,000 and specify currency in question 25.2.

25.2 Please select your currency:

- NZD
- AUD
- GBP
- USD
- EUR
- CAD
- Other - please specify

26. Where do you live? (Please select)