Cook Islands Visitor Survey

Annual Report

July 2014 - June 2015

Prepared for Cook Islands Tourism Corporation

by

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www.nztri.org

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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 the online international visitor survey (IVS) that has run since mid-2012. The survey period covered in this report is 1 July 2014 to 30 June 2015. There were 3228 individual respondents to the survey - representing a total of 6235 adults, and an additional 681 children (we estimate this equates to 5.7% of all visitors during the period – based on the latest visitor arrival data from the Cook Islands Statistics Office).

The survey results for this year are generally consistent with the survey results for the 2013-2014 annual period. The consistency in the responses is an indication of the robustness of the dataset. Visitor spend prior to arrival in the Cook Islands ($2,000), and spend while on the island ($112 per person per day) have increased slightly from the 2013-2014 annual average figures ($1,985 per person and $111 per person per day). The majority (62%) of visitors surveyed come from New Zealand, 22% come from Australia. Visitors are well educated (71% some form of tertiary education) and nearly half (46%) have a household income of over NZ$100,000 per year. Half of the visitors surveyed are travelling with just one companion. Solo travellers are relatively rare (7%).

Nearly two-thirds of the visitors surveyed (63%) are on their first visit to the Cook Islands, a further 23% 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 8.6 nights. The majority of the visitors (93%) stay either one or two weeks. Nearly one quarter (24%) of the visitors surveyed visit Aitutaki.

Visitor satisfaction with activities and level of services is high. Water-based activities are characterised by the strongest participation levels, while cultural activities are characterised by the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are the beautiful natural environment, the friendly local people, and the peacefulness and relaxing atmosphere of the islands. The least appealing elements of the Cook Islands visitor experience are the poor provision and quality of public services and facilities, the numerous stray dogs, and the poor value for money provided by a small percentage of food and beverage and accommodation operators.

Overall satisfaction on the part of visitors is very high and remains consistent with the previous year: 94% of visitors felt satisfied with their experience in the Cook Islands. The future intentions of visitors remained very similar to the previous year: 93% of those surveyed want to return to the Cook Islands and 98% would recommend the Cook Islands to friends or family.

Acknowledgements

NZTRI would like to acknowledge the support of numerous organisations in the Cook Islands in undertaking this ongoing research, and in particular the Cook Islands Tourism Corporation (special mention to Metua Vaiimene and Jake Numanga), the Cook Islands Statistics Office, Immigration Cook Islands, and Rarotonga International Airport. This report was prepared by Simon Milne and Mindy Sun with contributions from Suzanne Histen, Michael Jamet, and Anna Ongaro.

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INTRODUCTION

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 by this report is 1 July 2014 to 30 June 2015.

The annual report is designed to provide an easily accessible summary of the key findings that have emerged from the four quarterly reports provided during the July 2014 – June 2015 period **(Qtr 1 July –September 2014; Qtr 2 October – December 2014; Qtr 3 January – March, 2015; Qtr 4 April – June, 2015)**. Each of these quarterly reports provides a more detailed overview of findings. During the 12 month period 11,400 visitors were contacted by email to take part in the survey, and 3228 responses were received: the conversion rate across the year remained consistent at approximately 28% (Table 1).

Table 1: Conversion rate

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Total/Average
Emails sent	3799	2979	1703	2919	**Total: 11400**
Respondents	1103	787	447	891	**Total: 3228**
Conversion rate	29%	26%	26%	31%	**28%**

The report focuses on the following themes:

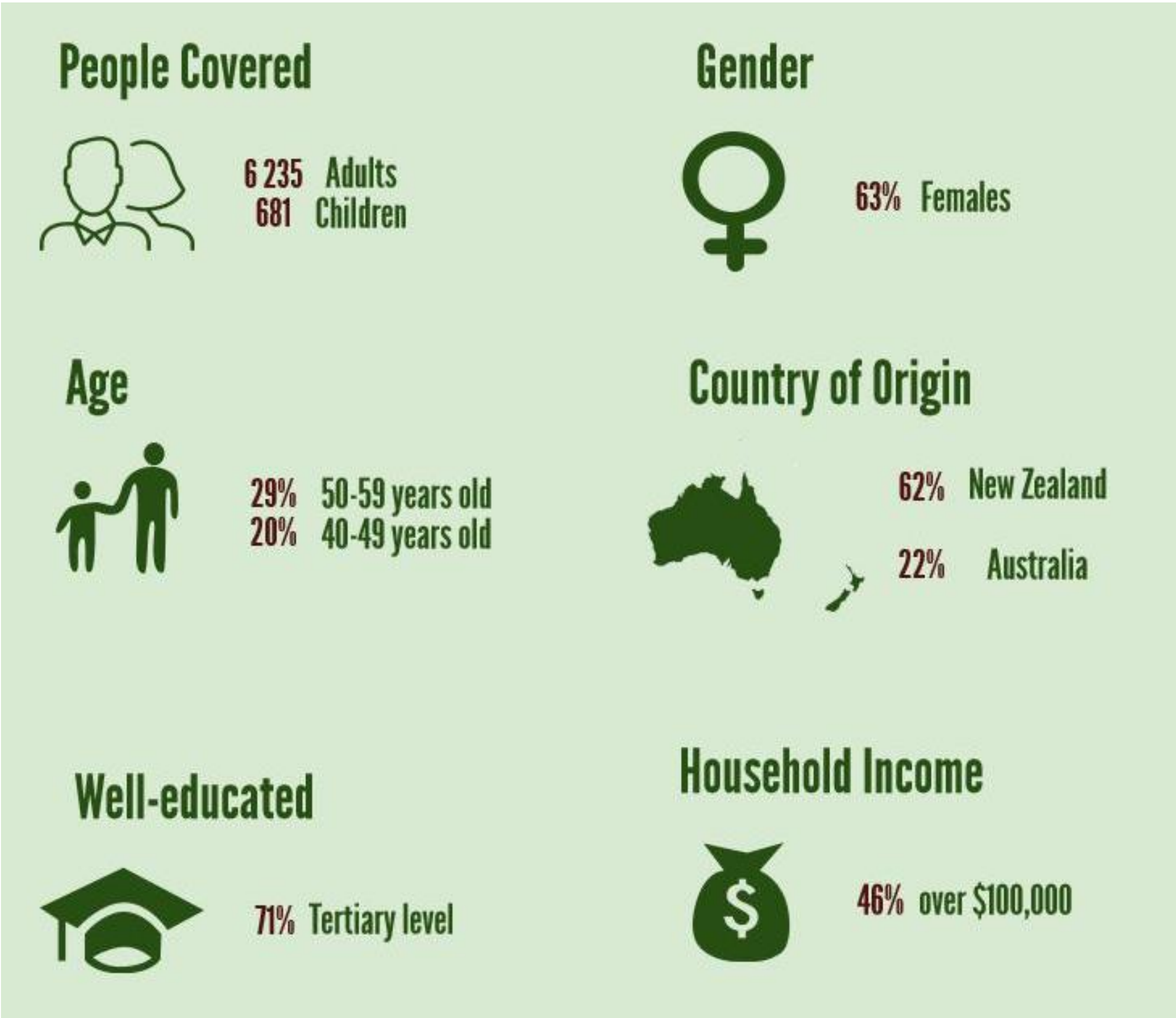
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling companions, number of previous visits, length of stay, airline used, and islands visited).
- Visitor expenditure (amount of money spent prior to arrival and while in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

In each section of the report we provide a simple 'infographic' that summarises some of the key highlights for the 2014-2015 survey period. More detailed tables are also provided that present key findings for major survey variables across the four quarters.

THE VISITOR

There were 3228 individual respondents to the survey - representing a total of 6235 adults and an additional 681 children. We estimate that this equates to 5.7% of all visitors during the period – based on the latest available visitor arrival data from the Cook Islands Statistics Office.

Figure 1: Summary of visitor demographics 2014-15



The distribution of age and gender of respondents is consistent throughout the year. As is typical with online visitor survey research there is some bias towards female respondents (Table 2).

On average, nearly half of the visitors (49%) are between 40 and 59 years of age which indicates a more mature traveller. A further 19% fall into the 60-69 age group.

The Australian and New Zealand markets dominate in terms of visitor arrivals but there are variations through the year. The majority of visitors surveyed (62% annual average) are from New Zealand. The Australian market makes up just over a fifth (22%) of those surveyed to the

Cook Islands. Visits by New Zealanders dropped during the January- March (3rd Qtr) period which coincides with the country's summer holiday season. During the same period, European visitors are at their most prominent as they escape the Northern hemisphere winter months.

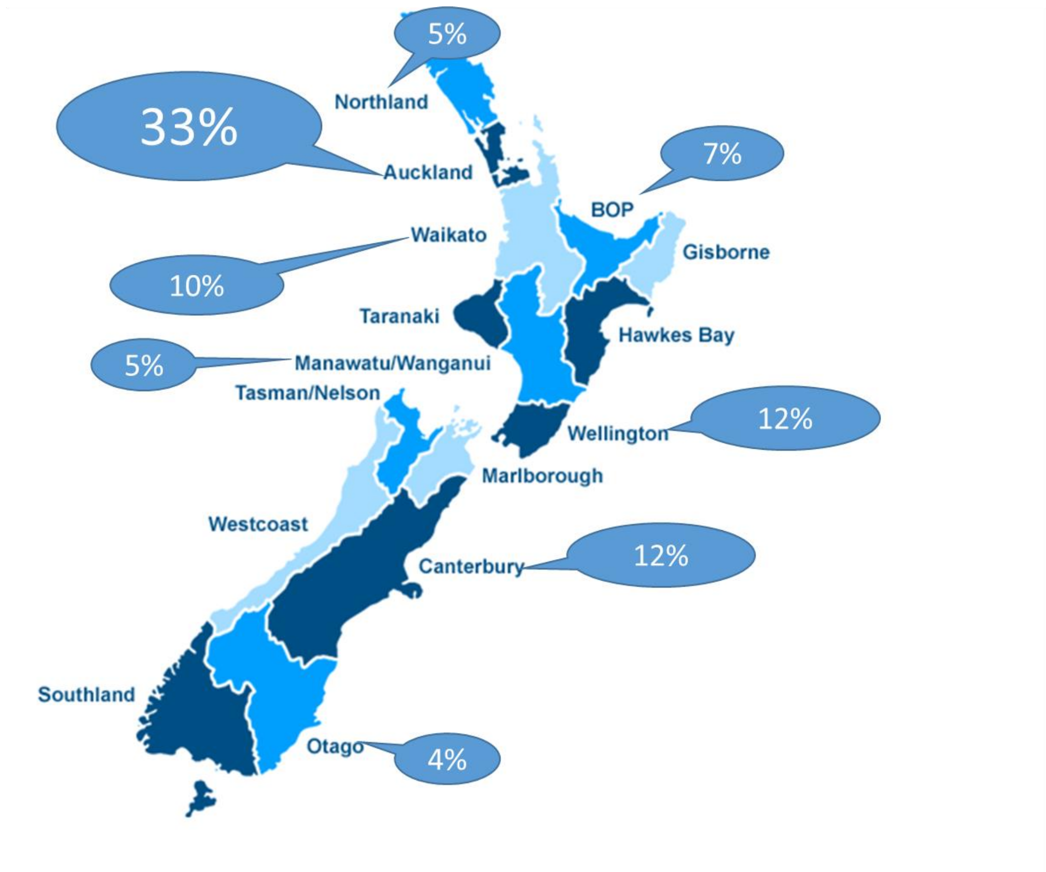
Visitors are well educated with over two thirds of respondents having some form of tertiary education. Nearly half of all visitors have household incomes of over NZ$100,000. It is worth noting that over 1 in 10 visitors have a household income of more than NZ$200,000 (Table 2).

Table 2: Demographics across 1-4 quarters 2014-15

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Total/Average
People covered					
Adults:	2086	1642	871	1636	**Total: 6235 adults**
Children:	227	142	113	199	**681 children**
Gender					
Female:	64%	63%	61%	64%	**63%**
Age					
30-39 year old:	15%	15%	17%	16%	**16%**
40-49 year old:	20%	16%	20%	22%	**20%**
50-59 year old:	30%	32%	24%	28%	**29%**
60-69 year old:	19%	21%	17%	18%	**19%**
Country of origin					
NZ:	69%	62%	53%	64%	**62%**
Australia:	19%	23%	22%	22%	**22%**
USA/Canada:	5%	8%	14%	7%	**9%**
Europe:	5%	5%	11%	7%	**7%**
Education					
Tertiary level:	69%	71%	74%	69%	**71%**
Household income					
Under $100,000:	56%	56%	54%	53%	**55%**
$100,001-200,000:	33%	34%	36%	36%	**35%**
Over $200,001:	12%	10%	10%	11%	**11%**

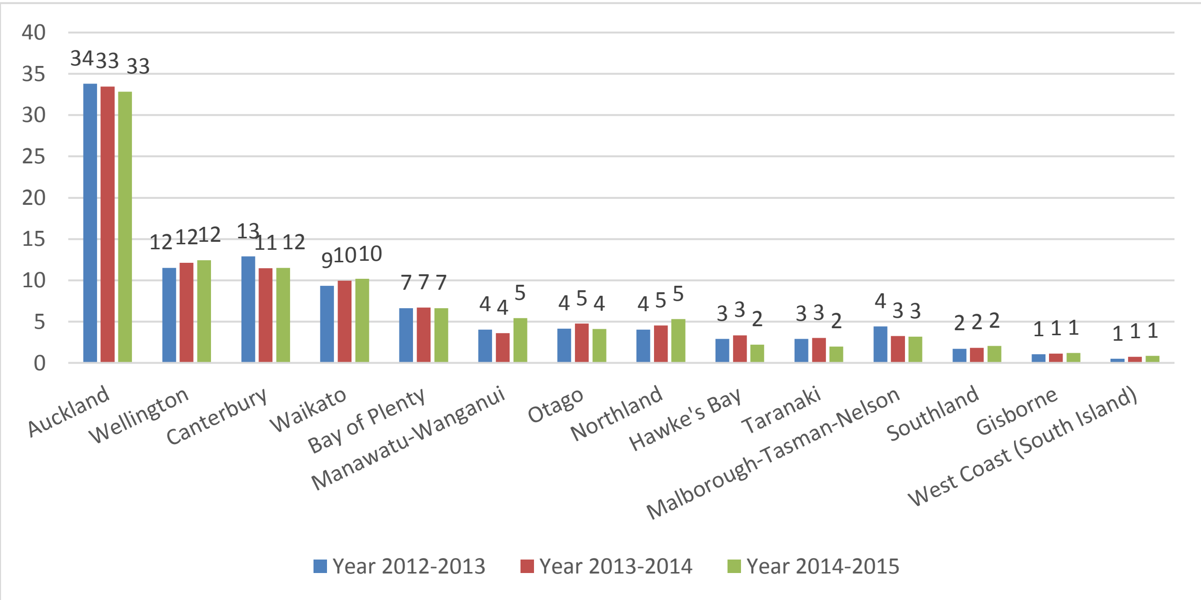
Visitors from New Zealand and Australia are given the opportunity to indicate which part of the country they reside in. Of the New Zealand visitors, a third came from Auckland, followed by Wellington, Canterbury, and Waikato, for the survey period 2014-2015 (Figure 2).

Figure 2: New Zealand visitors 2014-15



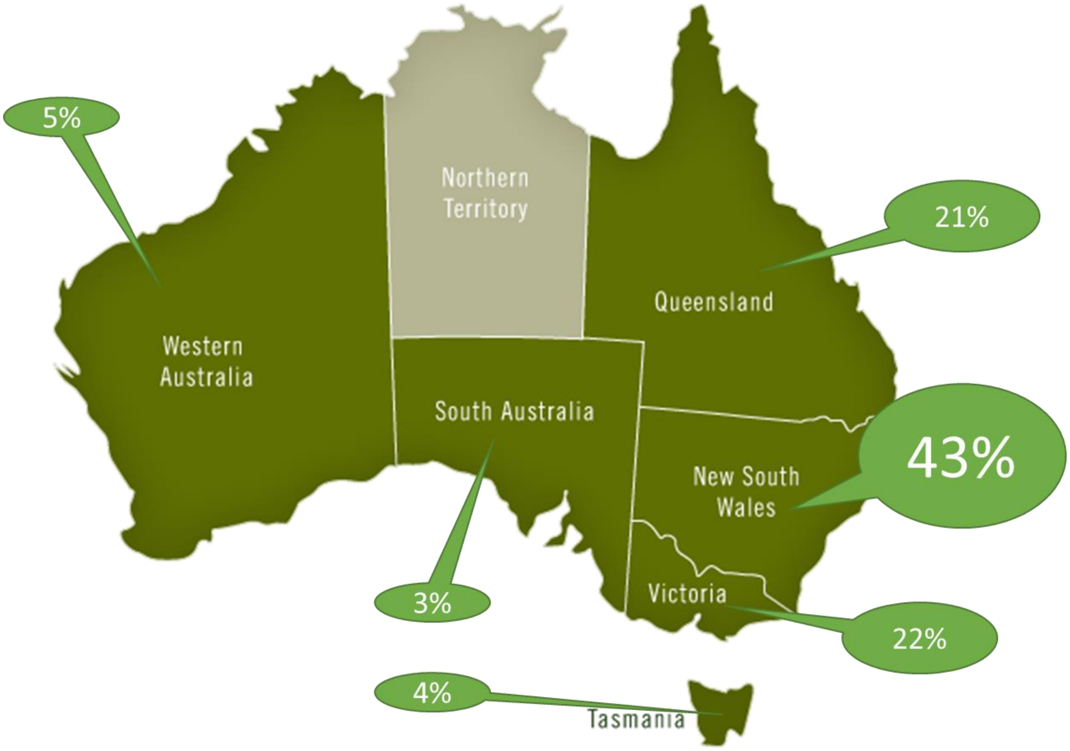
The New Zealand figures for 2014-2015 are consistent with the survey results from 2012-2013, and 2013-2014 with a third of the visitors coming from Auckland (Figure 3).

Figure 3: Visitors from New Zealand - yearly breakdown



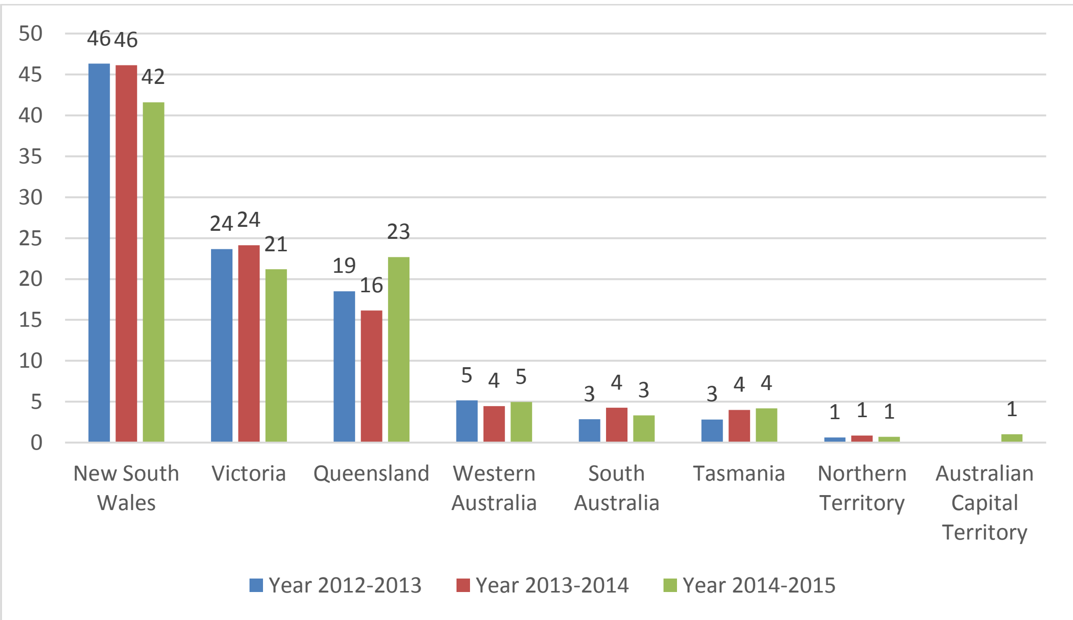
New South Wales, Victoria, and Queensland account for the majority (86%) of the Australian visitor arrivals to the Cook Islands during the survey period of 2014-2015 (Figure 4).

Figure 4: Australian visitors 2014-15



Compared with the prior two years, there is a slight drop in the relative number of visitors from NSW and Victoria during 2014-15, this is counter balanced by an increase in visitors from Queensland (Figure 5).

Figure 5: Visitors from Australia - yearly breakdown



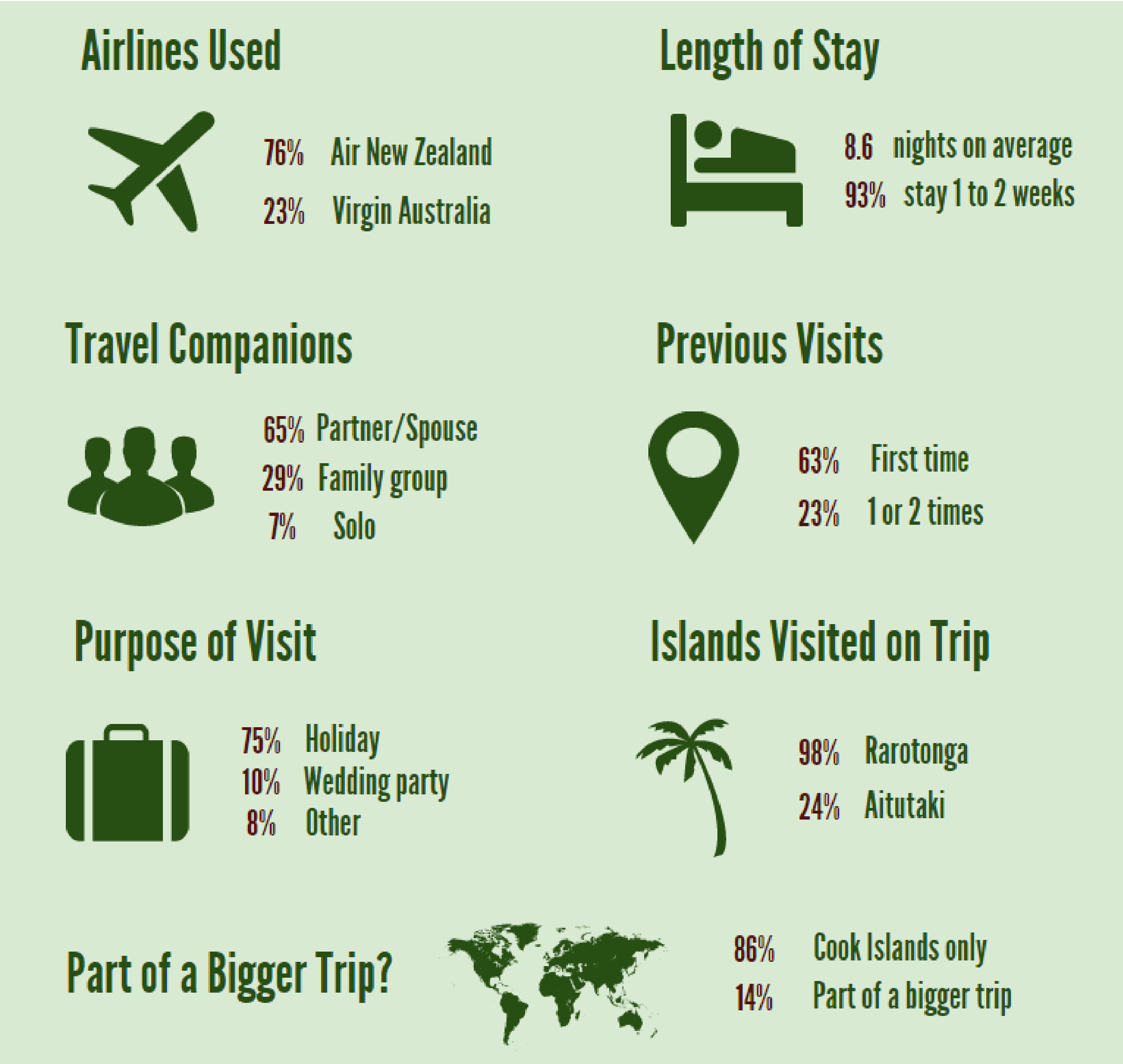
VISITOR CHARACTERISTICS

Air New Zealand is the most commonly flown airline to Rarotonga (76% of respondents) with Virgin Australia capturing 23% of the market (Figure 6).

Virtually all visitors spend time on Rarotonga, with nearly one quarter (24%) visiting Aitutaki. Of the smaller Islands, 2% of visitors went to Atiu, with other outer islands attracting only a small number (0.4 - 0.5%) of those surveyed.

A sizeable portion of visitors (63%) were on their first visit to the Cook Islands, with a further 24% having visited once or twice before. New Zealanders are most likely to be repeat visitors with nearly half (48%) having visited at least once before.

Figure 6: Summary of visit characteristics 2014-15



The majority of visitors (53%) spend 1 week in the Cook Islands with a further 40% staying a second week (Table 3). Only 7% spend longer than 2 weeks. The average length of stay over the 12 month period was 8.6 days – with little variation across the four quarters.

Table 3: Visit characteristics across 1-4 quarters 2014-15

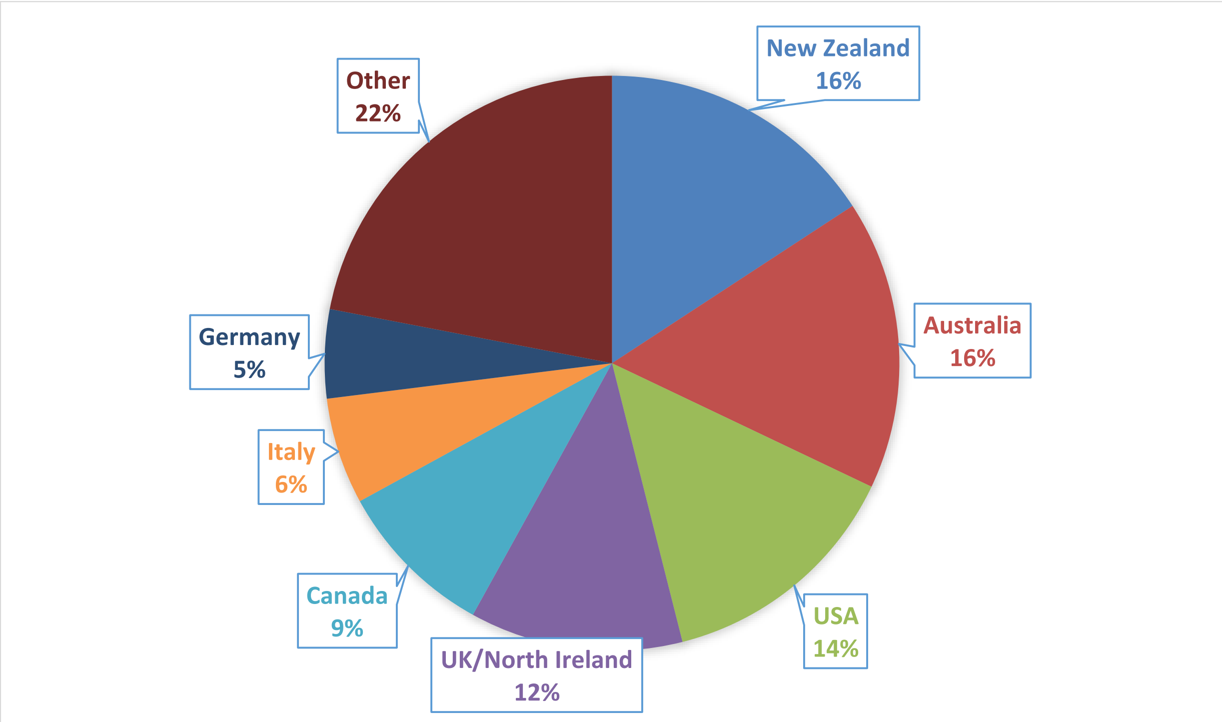
Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Airlines used					
Air NZ:	79%	72%	75%	78%	**76%**
Virgin Australia:	20%	27%	23%	21%	**23%**
Companions					
1 companion:	49%	49%	52%	48%	**50%**
Solo:	6%	7%	7%	7%	**7%**
Visits to Cook Islands					
1st trip:	62%	60%	66%	64%	**63%**
1-2 previous trips:	24%	24%	19%	24%	**23%**
Previous visits					
1-2 times:	NZ 29% AU 16%	NZ 31% AU 15%	NZ 24% AU 15%	NZ 31% AU 11%	**NZ 29% AU 14%**
3-4 times:	NZ 9% AU 2%	NZ 10% AU 6%	NZ 9% AU 6%	NZ 7% AU 5%	**NZ 9% AU 5%**
5+ times:	NZ 8% AU 6%	NZ 8% AU 6%	NZ 12% AU 7%	NZ 10% AU 2%	**NZ 10% AU 5%**
Travelling with who?					
Partner/spouse:	67%	66%	60%	68%	**65%**
Family group:	32%	27%	29%	29%	**29%**
Purpose of travel					
Holidaymakers:	77%	75%	70%	77%	**75%**
Wedding party:	11%	11%	9%	10%	**10%**
Honeymoon:	4%	5%	5%	4%	**5%**
Business:	2%	2%	3%	3%	**3%**
Length of stay					
Average nights:	8.5	8.6	8.8	8.3	**8.6**
Within 1 week:	53%	55%	50%	55%	**53%**
1week to 2 weeks:	42%	37%	41%	41%	**40%**
Islands visited on trip					
Rarotonga:	97%	98%	97%	98%	**98%**
Aitutaki:	25%	22%	27%	23%	**24%**
Atiu:	3%	2%	1%	2%	**2%**
Is Cooks visit part of a larger trip?					
Cooks only:	89%	88%	80%	88%	**86%**
Part of a larger trip:	11%	12%	20%	12%	**14%**

When asked for their purpose of visit the majority of visitors (75%) classify themselves as holiday makers. Participation in a wedding party also represented a major purpose of visit for a further 10% of those surveyed.

The Cook Islands represent the only travel destination on this particular trip for 86% of the visitors. For 14% of visitors the Cook Islands is part of a larger trip, which includes other destinations such as New Zealand (64%), Australia (27%), USA (21%), other Pacific Islands (20%), and Asia (20%).

Of the group travelling to multiple destinations, 16% come from New Zealand, 16% from Australia, 14% from USA, 12% come from UK/North Ireland, and 9% from Canada (Figure 7).

Figure 7: Country of origin for visitors for multiple destinations 2014-15

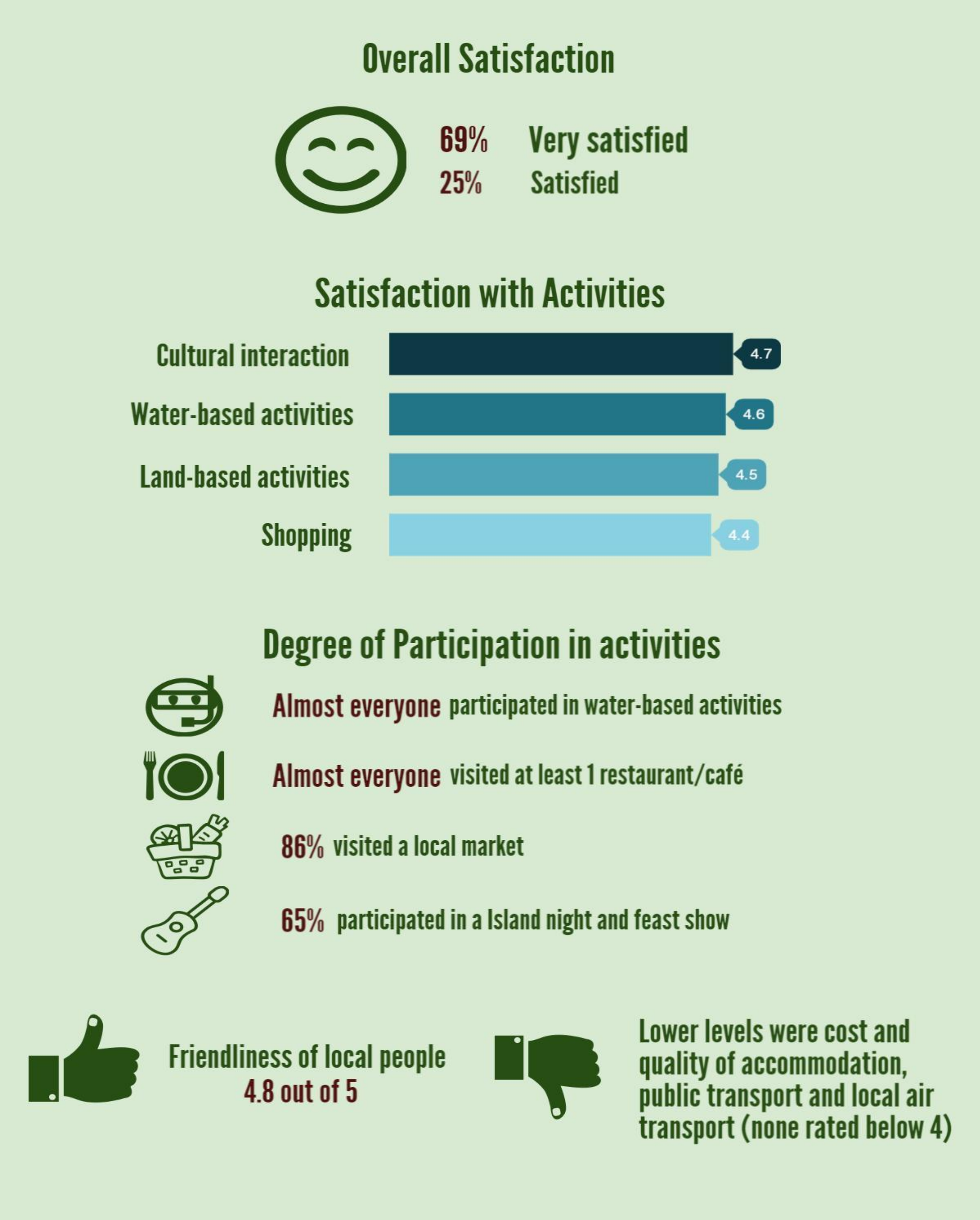


Many of the long haul visitors combine their visit to the Cook Islands with trips to other destinations. More than four in five of visitors from Italy (88%) and the UK/North Ireland (81%) visit the Cook Islands as part of a longer trip. Just under half (45%) of visitors from Canada and 34% from the United States are multiple destination visitors. Only 10% of visitors from Australia and 3% from New Zealand are travelling to the Cook Islands as part of a larger journey.

VISITOR SATISFACTION

Nearly three quarters (69%) of the visitors said they were “very satisfied” with their overall experience in the Cook Islands (on a scale from 1 ‘very dissatisfied’ to 5 ‘very satisfied’) (Figure 8).

Figure 8: Visitor satisfaction 2014-15



Visitor satisfaction is generally high for all activities undertaken (Table 4). Visitors enjoy water-based activities, with almost everyone participating in some sort of beach based activity (98% beach, 92% swimming, 82% snorkelling). Nearly all of visitors (98%) visit at least one restaurant/bar/café during their stay in the Cook Islands. The local markets and Island Night shows are also enjoyed by the majority of visitors (86% and 65% respectively).

Table 4: Satisfaction across 1-4 quarters

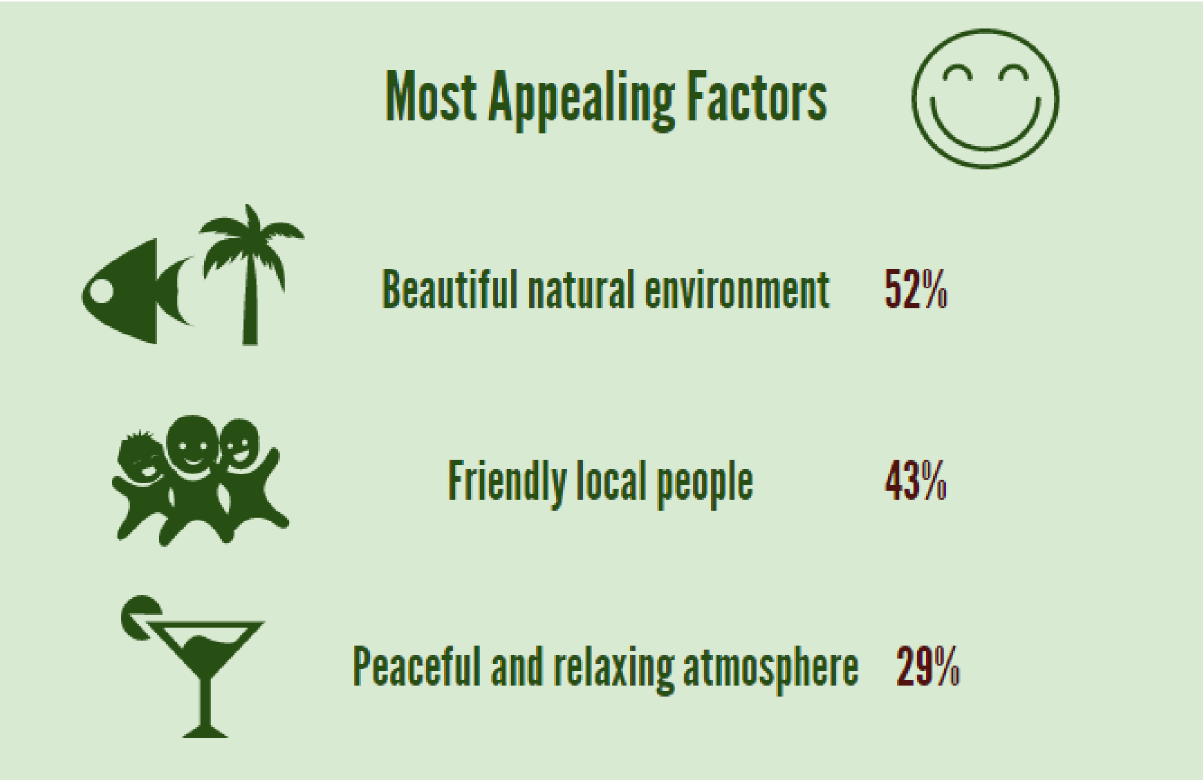
Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Overall satisfaction					
Very satisfied:	66%	71%	69%	71%	**69%**
Satisfied:	27%	24%	25%	23%	**25%**
Satisfaction with activities	Water-based, cultural interaction, land-based and shopping: all have high satisfaction levels (greater than 4 out of 5)				
Water-based:	4.5	4.6	4.6	4.5	**4.6**
Cultural interaction:	4.6	4.7	4.7	4.7	**4.7**
Land-based:	4.5	4.5	4.4	4.5	**4.5**
Shopping:	4.3	4.4	4.3	4.4	**4.4**
Degree of participation in activities	**Almost everyone participated in water-based activities and visited at least 1 restaurant/café**				
Visit local market:	83%	88%	88%	86%	**86%**
Island night & feast show:	65%	67%	63%	65%	**65%**
Lowest participation:	Bonefishing, Kitesurfing, Tumunu on Atiu				
Satisfaction with different aspects of service in Cooks	**Friendliness of local people – highly rated (out of 5)**				
Friendliness of local People:	4.7	4.8	4.7	4.8	**4.8**
	Lowest levels of satisfaction: Cost and quality of accommodation, the frequency of air transport within the Cook Islands, and local public transport (although none was below 4 out of 5)				
Cost of accom:	4.0	4.1	4.1	4.2	**4.1**
Quality of accom:	4.2	4.3	4.3	4.4	**4.3**
Local air transport:	4.2	4.2	4.2	4.3	**4.2**
Public transport:	4.3	4.2	4.2	4.3	**4.3**

Visitors were asked to rate their level of satisfaction with nine different statements that related to their most recent visit to the Cook Islands. Friendliness of the local people scored the highest among all of the categories with 4.8 out of 5. The lowest levels of satisfaction relate to the cost and quality of accommodation (4.1/4.3), the frequency of air transport within the Cook Islands (4.2), and public transport experience (4.3). In no cases though do satisfaction scores fall below 4 out of 5. There is little variation in participation rates and satisfaction levels across the four quarters.

Visitors were given the opportunity to discuss in more detail the factors that they found most or least appealing about their last visit to the Cook Islands. Such information provides important insights into travel motivation and also enables a clearer picture to be gained about decisions to make a return visit or to recommend the Cook Islands to others. We reviewed and categorised the responses – people could provide as many responses as they wished to (Figure 9, Table 5).

The beautiful natural environment consistently receives the highest rating in terms of appeal. The majority of visitors (93%) mentioned at least one appealing aspect of their visit. Over half of all visitors (52%) who made a positive comment are enthusiastic about the 'untouched' and relatively pristine nature of both the marine and natural environments. Visitors also found the friendliness of the local people (43%) and the relaxing atmosphere that the Cook Islands has to offer (29%) very appealing.

Figure 9: Most appealing facts 2014-15



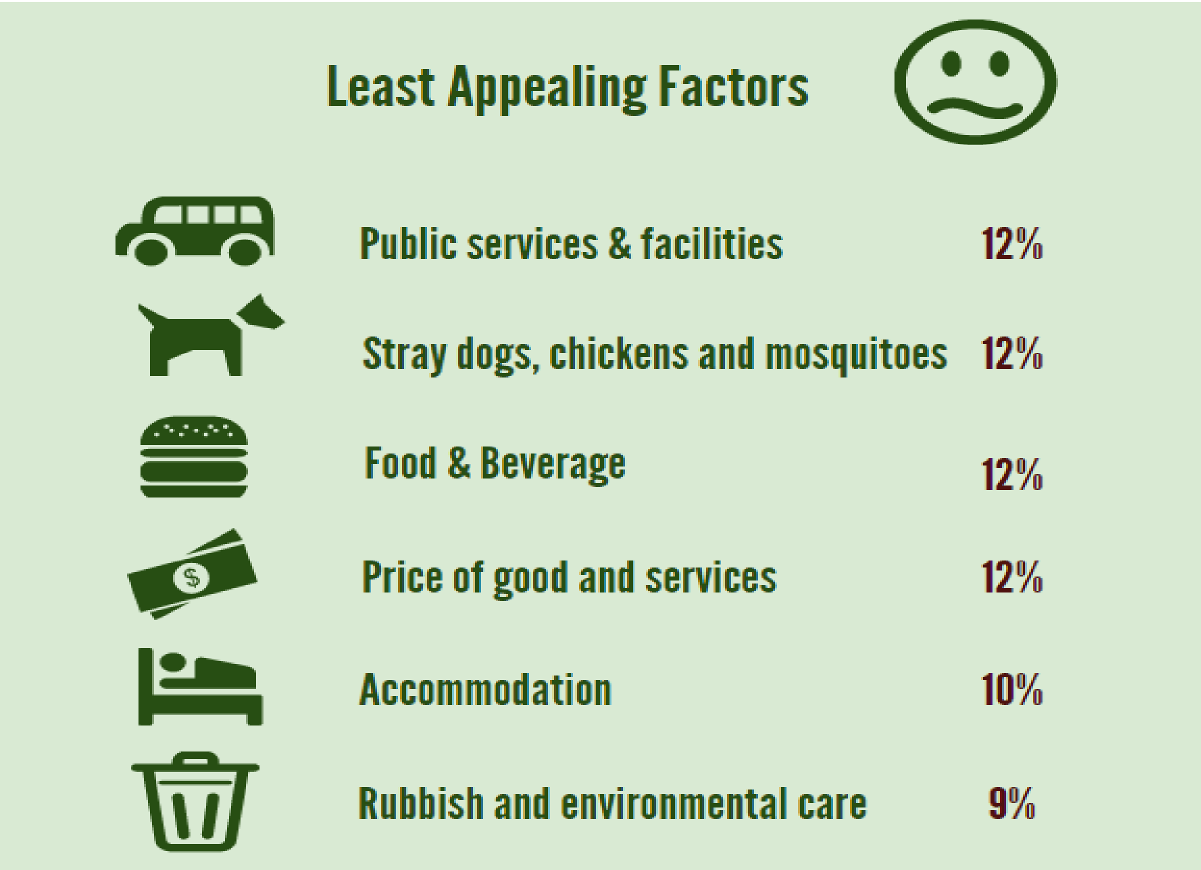
The percentage of tourists highlighting the three most significant areas of appeal remained relatively consistent across the 4 quarters, with some drop off noted in the last 2 quarters (Table 5). These figures remain consistent with the levels registered last year.

Table 5: Most appealing factors across 1-4 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Beautiful natural environment	53%	56%	48%	49%	**52%**
Friendly local people	45%	46%	41%	40%	**43%**
Peaceful and relaxing atmosphere	33%	34%	25%	25%	**29%**
Activities/attractions/entertain-ment/events	31%	29%	22%	20%	**26%**
Food and beverage	10%	12%	9%	11%	**11%**

Visitors were also asked to list and discuss the least appealing aspects of their most recent visit to the Cook Islands (Figure 10, Table 6). While most tourists (86%) took the time to comment on at least one 'least appealing' aspect of their stay, over a fifth of these (22%) simply stated "nothing".

Figure 10: Least appealing factors 2014-15



Of those that did mention unappealing aspects, the key themes to emerge were a lack of public services and facilities (12%). A number of tourists also focused on the problems associated with stray dogs, chickens and mosquitoes. The quality of food and beverage and the high prices of goods and services and accommodation were also commented on. Visitors also raised concerns about environmental issues (pollution, rubbish).

Table 6: Least appealing factors across 1-4 quarters

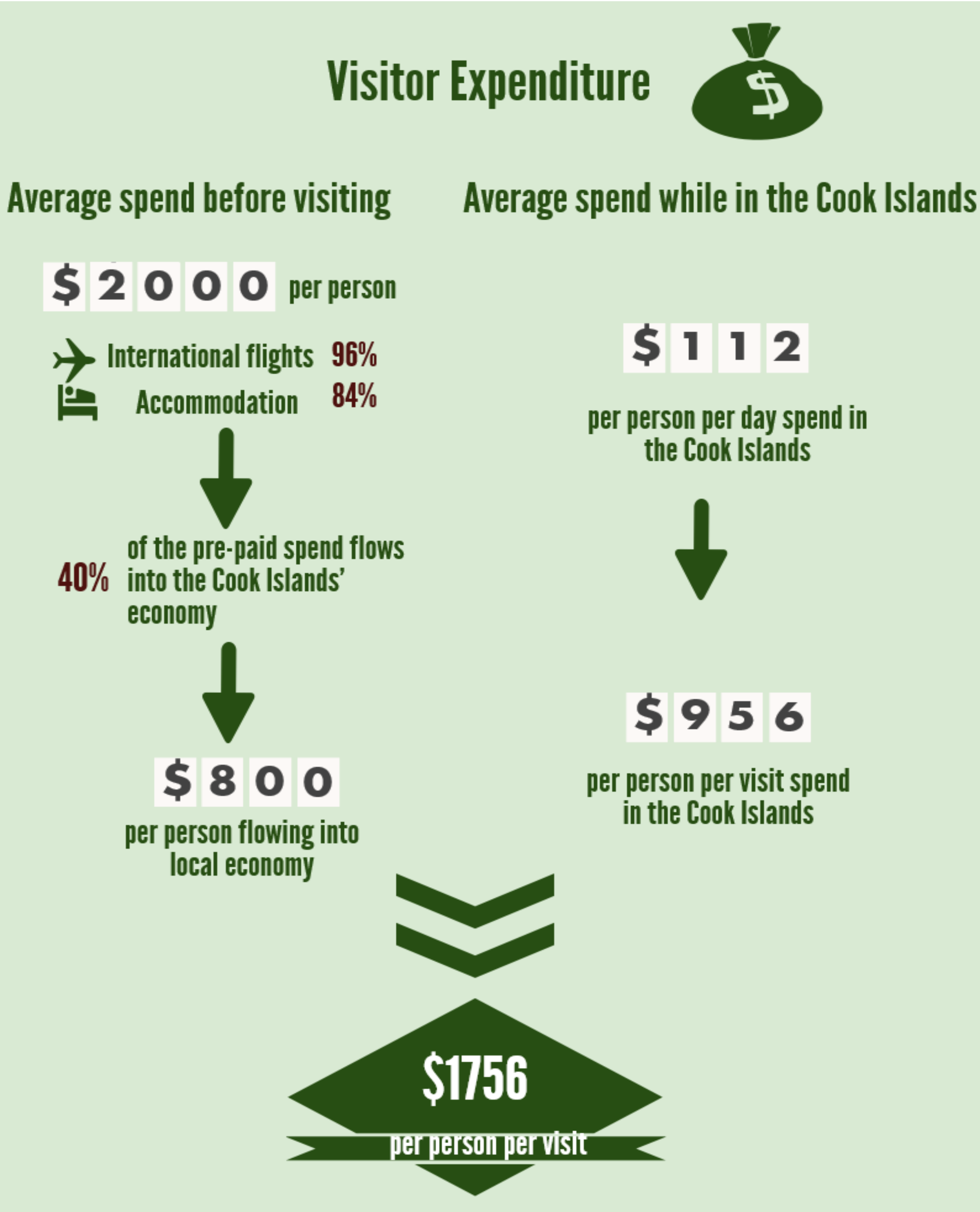
Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Public services & facilities	8%	11%	13%	15%	**12%**
Stray dogs, chickens and mosquitoes	12%	10%	11%	13%	**12%**
Food and beverage	12%	13%	10%	11%	**12%**
Price of goods and services	5%	13%	15%	14%	**12%**
Accommodation	11%	12%	9%	7%	**10%**
Rubbish and environmental care	8%	8%	8%	10%	**9%**

Compared with the annual data of 2012-13 and 2013-14, there is relative reduction in negative comments about public service and facilities. The price and the quality of food and beverage and accommodation, service levels, stray animals and mosquitoes, and environmental care, are characterised by similar levels of comments, or have dropped slightly.

VISITOR EXPENDITURE

In reviewing the economic impact of tourism on the Cook Islands economy this report focuses on two key components: money spent before arrival (on airfares and/or packages) and money spent once in the Cook Islands (excluding pre-paid spend) (Figure 11, Table 7).

Figure 11: Visitor expenditure 2014-15



Pre-paid spend is a significant contributor to the economic impact of tourism, with an average of NZ$2,000 being spent per visitor. For the bulk of visitors this spend includes international airfares (96%) and accommodation (84%). We estimate that approximately 40% of pre-paid spend (or NZ$800) makes its' way back into the Cook Islands economy.

The amount of money spent by visitors whilst in the Island averaged NZ$112 per person per day for the 2014-15 period ($956 per visit).

Table 7: Expenditure across 1-4 quarters

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Average spend before visiting (per person)	$2121	$1854	$2019	$2005	**$2000**
Pre-paid spend that flows into the local economy (per person)	40% of the pre-paid spend flows into the Cook Islands' economy				
	$848	$742	$808	$802	**$800**
Items included in spent prior to arrival ***Inter. Flights:*** ***Accom:***	97% 85%	97% 83%	94% 81%	95% 86%	**96%** **84%**
Spend while in Cooks ***Whole trip:*** ***per person per day:***	$917 $108	$989 $115	$991 $113	$926 $112	**$956** **$112**
Total spend per visit flowing into the Cook Islands economy	$1,765	$1,731	$1,799	$1,728	**$1,756**

New Zealand visitors have the lowest on-island spend of the major tourism markets – with a figure of NZ$111 per person per day (or NZ$222 per couple). The highest spending group are visitors from North America at NZ$125 per person per day (Figure 12, Table 8). Australians and Europeans both spend an average of NZ$115 per day.

There are differences in spend figures between nationalities during the course of the year; North Americans spend most from January to March (3rd Qtr). Australians spend more during April to June (4th Qtr) with visitors from New Zealand spending more during October to March (2nd & 3rd Qtr). Visitors from Europe spend more in the January to June period (3rd & 4th Qtr). These variations could point to different sub-markets from these major source markets, and this is an area worthy of further data analysis. It should be noted that some of the quarterly data for specific market groups (e.g. Europe) is based on relatively small sample sizes. For more specific details the reader is directed to the Quarterly reports.

Figure 12: Visitor expenditure in the Cook Islands by country of origin 2014-15

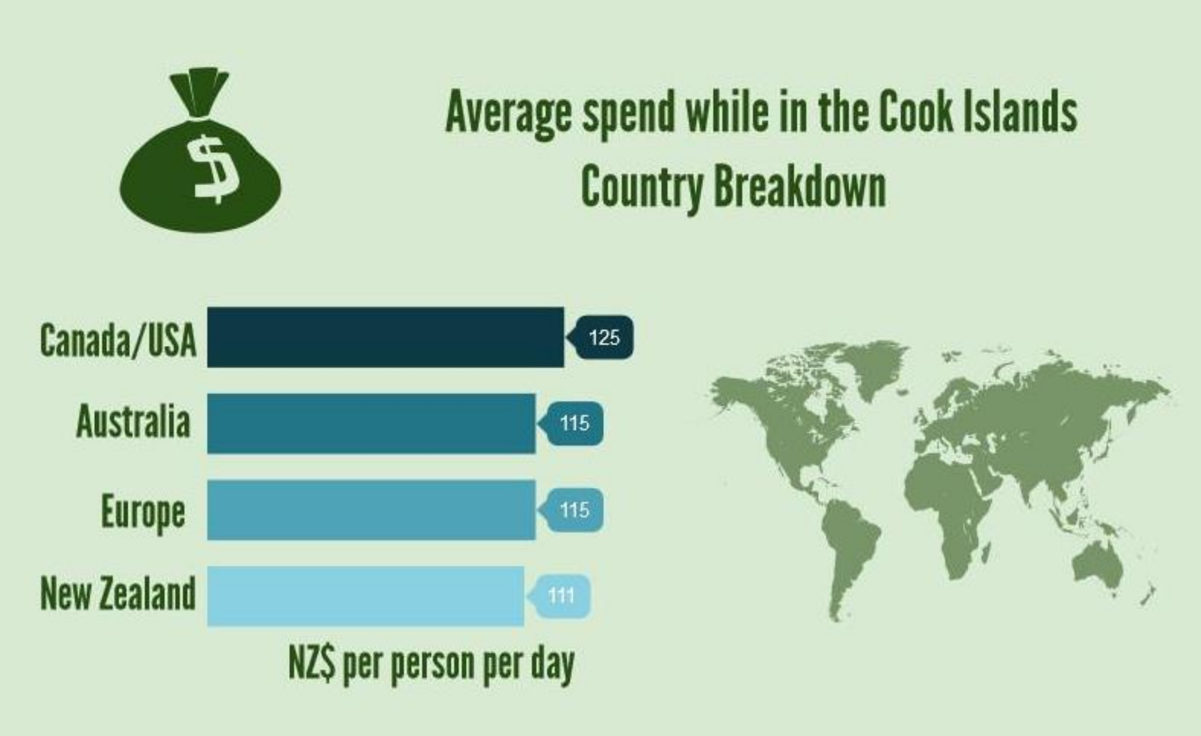


Table 8: Expenditure in the Cook Islands across 1-4 quarters by Country of origin

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Average spend by country of origin (person per day)					
Canada/USA:	$113	$120	$146	$122	**$125**
Australia:	$115	$119	$101	$126	**$115**
NZ:	$107	$114	$116	$107	**$111**
Europe:	$102	$103	$129	$126	**$115**

It is important to understand how in-country visitor spend is distributed across different sectors of the economy. Table 9 shows the spread of average visitor expenditure (per person per day) in the Cook Islands cross quarters 1-4. These figures represent average spend per day for **all** visitors (e.g. whether they have spent money on a category or not).

Because most accommodation is pre-paid the dominant spend category is 'restaurants, cafes and bars' with an average of NZ$33. Accommodation features as the second most important category for visitor spend – this includes those that have not pre-paid for a room and also those who may pay for accommodation extras once on island (e.g. a room upgrade, wi-fi access).

Table 9: Average visitor expenditure in the Cook Islands cross 1-4 quarters
(NZD per person per day)

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Restaurant/cafes/bar	32	32	34	35	**33**
Accommodation	25	29	26	24	**26**
Shopping	14	15	16	15	**15**
Activities	9	9	9	9	**9**
Groceries	8	9	8	8	**8**
Vehicle rental	8	9	8	8	**8**
Domestic flights	3	3	4	4	**4**
Cruising	2	2	3	3	**3**
Other	3	3	2	2	**3**
Petrol	2	2	2	2	**2**
Public transportation	1	1	1	1	**1**
Total expenditure per person per day	108	115	113	112	**112**

Visitor expenditure on shopping, food (groceries) and activities is relatively low and there is certainly potential to increase visitor yield in these areas. The figures for car rental and petrol relate closely to the relatively low spend per day on public transport.

The overall spend per person per day figure is an important barometer of industry health and performance. It is critical in coming years that efforts be made to increase visitor yield across a range of sectors – especially those that generate strong links to the local economy.

FUTURE INTENTIONS

An overwhelming majority of visitors (93%) stated that they would return to the Cook Islands (Figure 13). More importantly nearly all visitors (98%) say that they would recommend the Cook Islands to others.

Of real interest to businesses and communities in the outer islands is the fact that 4 in 5 tourists (80%) expressed an interest in visiting another island on their next trip to the Cook Islands. The critical challenge is to convert this intention into an actual outer island visit.

The future intentions of visitors remained very consistent across the year (Table 10) with no more than a 2-5% variation in responses.

Figure 13: Future intentions 2014-15

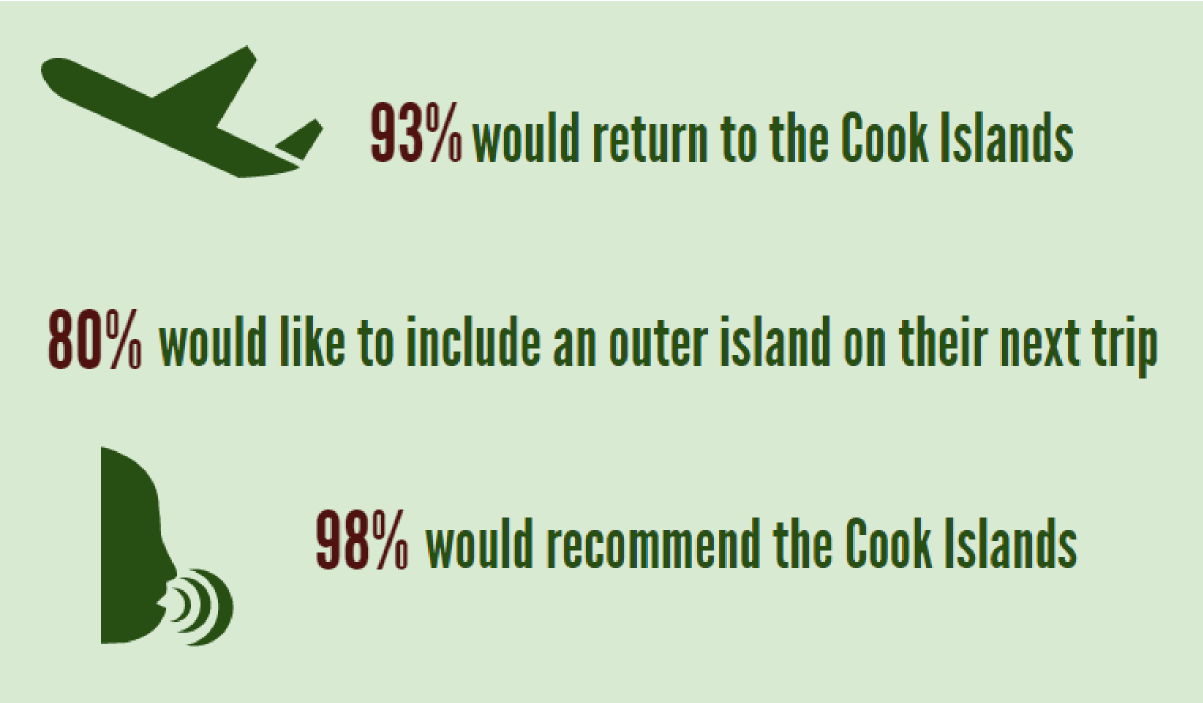


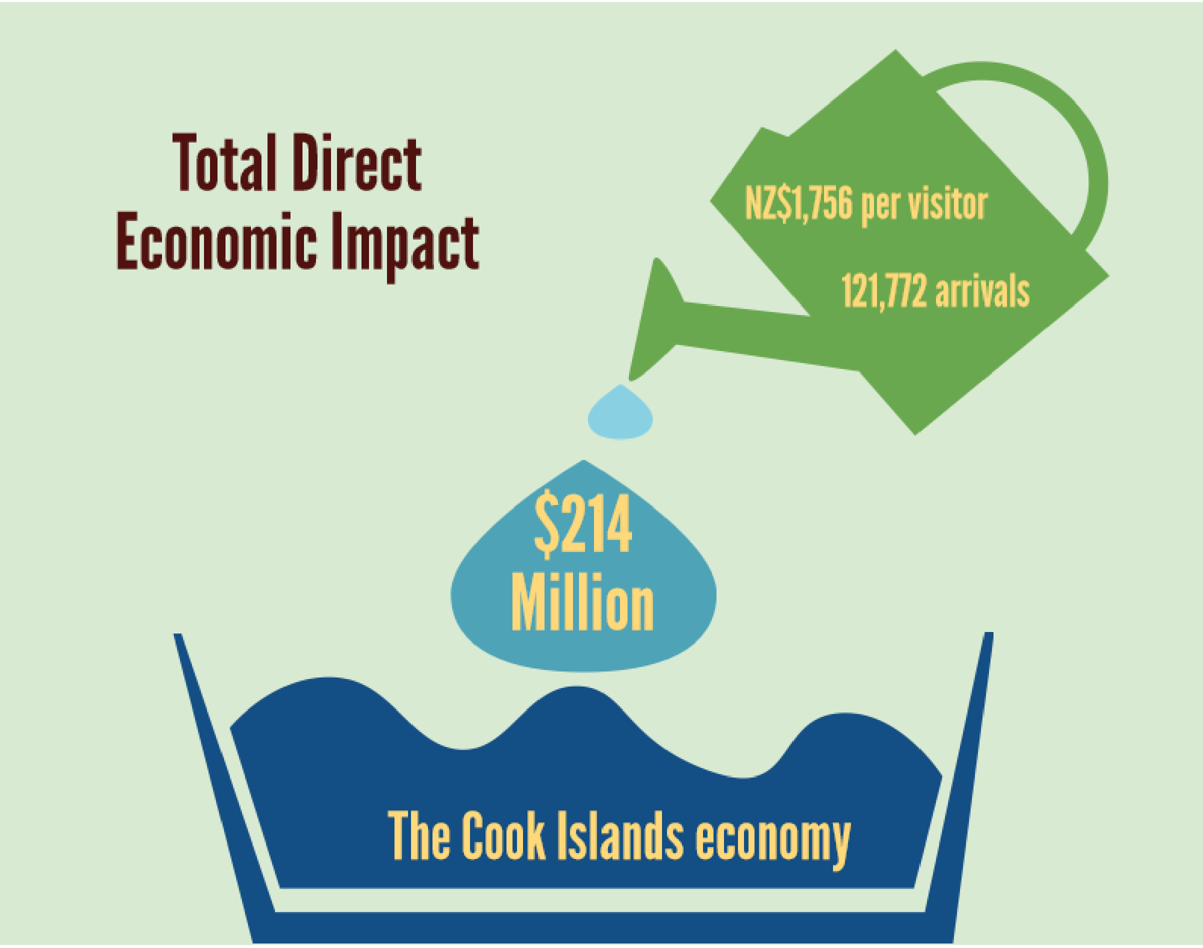
Table 10: Future intentions 2014-15

Comparison	1st qtr	2nd qtr	3rd qtr	4th qtr	Average
Return to Cooks *Yes*	91%	94%	93%	93%	**93%**
Like to include other islands next trip *Yes*	79%	77%	80%	82%	**80%**
Recommend Cooks *Yes*	98%	97%	98%	98%	**98%**

2014-15 CONCLUSIONS

The Cook Islands tourism industry generally performed well during the July 2014 - June 2015 period. Tourism in Cook Islands is contributing significantly to the local economy. Based on the average spend of $1,756 per visitor ($956 on island + $800 pre-paid) we are able to provide an estimate of the direct economic value of tourism to the Cook Islands economy. Thus, every 10,000 tourists generate NZ$9,560,000 in on-island spend, plus an estimated NZ$8,000,000 in pre-paid spend (a total of $17.56 million). In total the 121,772 international arrivals from July 2014 to June 2015 injected $214 million into the local economy (Figure 14).

Figure 14: Total direct economic impact



It is clear that the tourism industry makes a vital, and undoubtedly undervalued, contribution to the Cook Islands economy. It is essential that further efforts be made to enhance yield per visitor. Such an approach not only creates more jobs and income for Cook Islanders, it also, inevitably enhances the visitor experience. A higher yield, value added approach will also place less pressure on the nation’s precious cultural and environmental resources, as the focus shifts away from simply increasing visitor numbers. This report shows there is room to enhance the visitor experience, and to increase the economic yield and broader community benefits associated with tourism.

Tourists’ satisfaction with the cost of accommodation is the lowest among all items surveyed. By upgrading facilities, and more importantly, enhancing the quality and ‘value added’ of existing experiences, the hospitality industry can increase visitor satisfaction, and enhance the generation of local economic benefits. The detailed accommodation data collected by the survey can be used to guide individual accommodation providers to measure satisfaction levels and to provide better value for money, thus improving opportunities for yield generation.

The percentage of visitors travelling to the outer islands increased during 2014-2015 when compared to previous years, and more visitors expressed an interest of including one of the outer islands when they visit the Cook Islands again. In the meantime, complaints about the frequency of air transport within the Cook Islands also increased.

As with previous reports significant numbers of international visitors’ perceive that “public services & facilities” are lacking, and several visitors mentioned they are bothered by “stray dogs”. It is important for the local government to improve public service and animal management programmes which are likely to reap dividends in terms of the country’s appeal to visitors.

This report shows that cost effective on-line research can generate strong response rates and robust information that is of value to both the tourism industry and government policy makers. Having a total of 3 years of international visitor data to analyse and ‘mine’ places the Cook Islands in a very powerful position relative to its competitors. The fact that the survey will continue through 2016, and hopefully beyond, means that future industry marketing and development decisions can continue to be based on a firm foundation of knowledge.