

Cook Islands Visitor Survey Results

July - September 2014

Prepared for Cook Islands Tourism Corporation

by

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Executive Summary

This report focuses on the characteristics, expectations and expenditure patterns of tourists who visit the Cook Islands. The data presented is drawn from an online departure survey (<http://www.mycookislandsvisit.com>). The survey period covered in this report is 1 July to 30 September 2014. There were 1103 individual respondents to the survey - representing a total of 2086 adults and an additional 227 children (this equates to 5.9% of all visitors during the period – based on the latest 2013 visitor arrival data for the June-September period from the Cook Islands Statistics Office).

The survey results for this quarter are generally similar to the survey results of the 2013-2014 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 (\$2,121) has increased slightly from the 2013-2014 annual average (\$1,985 per person), and spend on the island (per person per day of \$108) is consistent with 2013-2014 average (\$111). The majority (69%) of visitors surveyed come from New Zealand, 19% come from Australia. Visitors are well educated (69% of visitors have some form of tertiary education) and have a higher than average annual NZ household income (45% earn over NZ\$100,000 per year). Just under half (49%) of the visitors travel with just one companion. Solo travellers are relatively rare (6%).

Nearly two-thirds of the visitors surveyed (62%) are on their first visit to the Cook Islands, a further 24% have visited once or twice before. The main purpose of visit is holiday-making (77%). The average length of stay in the Cook Islands is 8.5 nights. The majority of the visitors (94%) stay either one or two weeks. Most (97%) of the visitors surveyed visit Rarotonga; 25% visit Aitutaki.

While in the Cook Islands, the total local spend per visitor per day is \$108, and the average local spend per visitor during the whole trip is \$917. If the pre-paid spend amount and the local spend amount are combined, it is estimated that each visitor brings \$1,765 to the Cook Islands economy (or approximately \$208 per day). The 'in-country' spend is higher than the same period for the previous year (\$102 for July-September 2014).

Visitor satisfaction with activities and services is high. Water-based activities are characterised by the strongest participation levels while cultural activities are characterised by the highest overall satisfaction ratings. The most appealing elements of the Cook Islands experience are the beautiful natural environment, the friendly local people, the peacefulness and relaxing atmosphere of the islands, and activities, attractions, entertainment and events. Smaller numbers of visitors mentioned 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 poor weather, the numerous stray dogs, and the poor quality and value for money of food and beverage and accommodation.

Overall satisfaction on the part of tourists is very high: 91% of those surveyed want to return to the Cook Islands and 98% would recommend the Cook Islands to friends or family. The overall satisfaction is very consistent with the previous year.

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Introduction

The Cook Islands government, local businesses and communities 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 24 months during 2012-2014 on a quarterly basis, and is continuing through 2014-2015.

This report presents the results from the July to September 2014 period. Over this three month period, 3799 visitors were contacted by email to take part in the survey, and 1103 responses were received: a conversion rate of 29%. These responses cover a total of 2086 adults and 277 children. The conversion rate for this period is higher than for the 2013-2014 annual average (25%), also higher than the Jul-Sep 2013 quarter (22%).

The data presented include detailed information on:

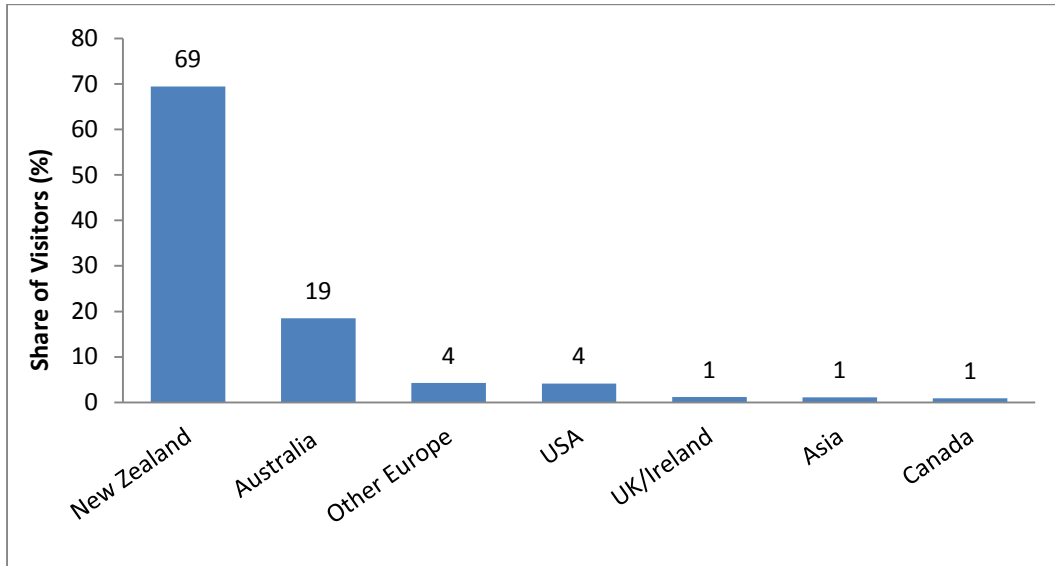
- The characteristics of visitors to the Cook Islands (age, gender, education, country of origin, income, purpose of visit, travelling with whom, number of previous visits, length of stay, airline used, visited islands)
- Visitor expenditure (amount of money spent prior to arrival and while in the Cook 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 2013-2014 annual averages these elements are highlighted. Comparisons across the four quarters will be provided in the annual report for this series.

Visitor Characteristics

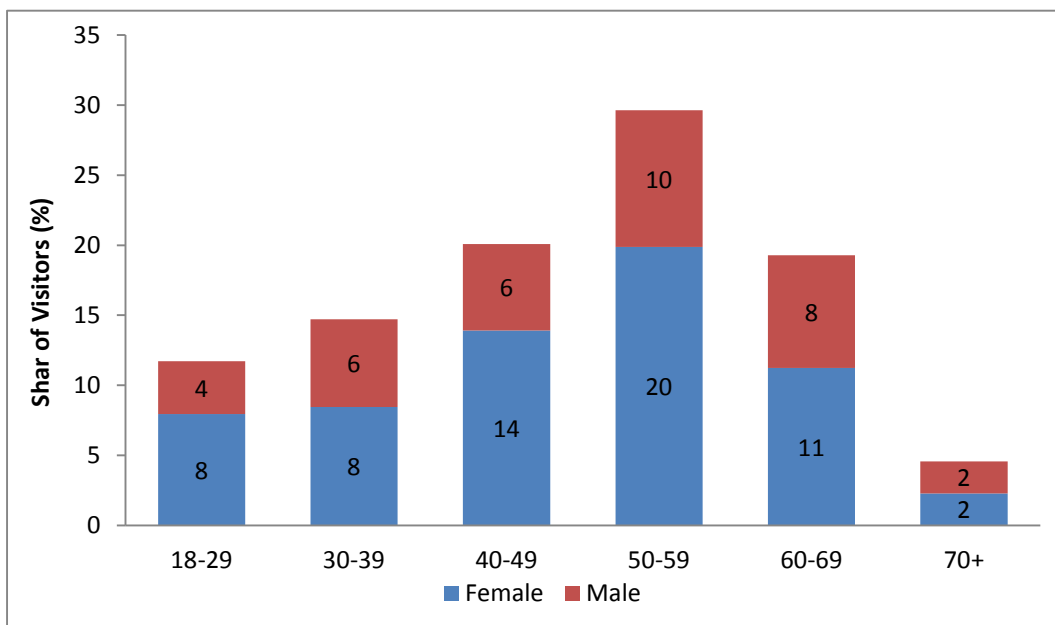
The majority (69%) of the visitors surveyed come from New Zealand (Figure 1). The second largest visitor group is from Australia, with 19% of respondents. Europe, USA, Great Britain, Asia and Canada represent the other key source markets.

Figure 1: Country of Origin (n=1010)



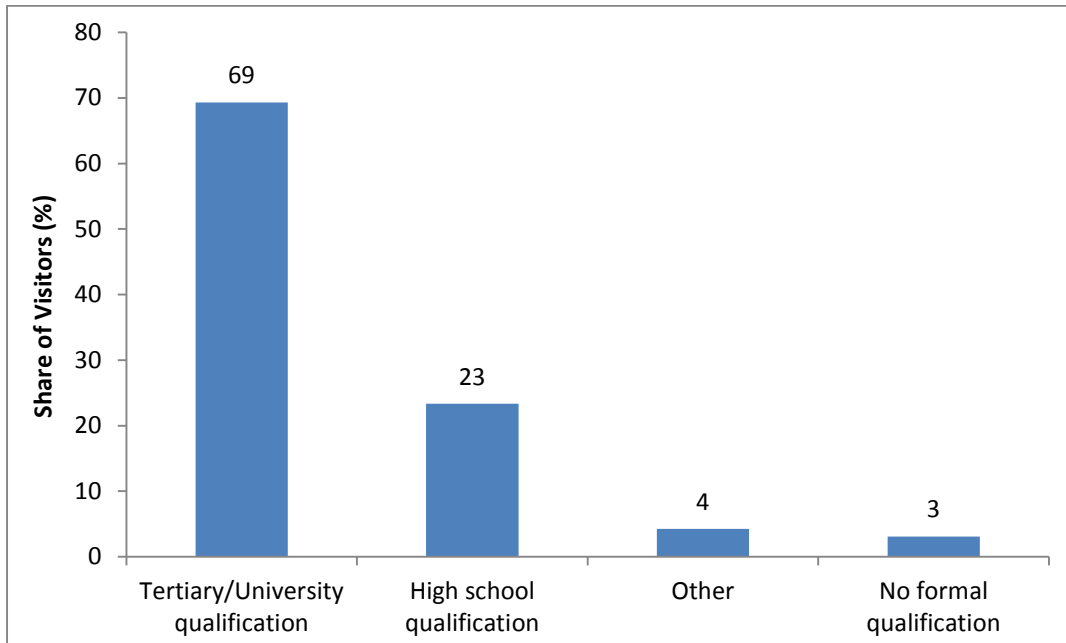
More women (64%) than men (36%) completed the survey (Figure 2). The 50 to 59 year olds are the most represented age group, followed by the 40 to 49, 60 to 69, and 30 to 39 year age groups. There are few senior travellers represented.

Figure 2: Distribution of Age and Gender (n=1006)



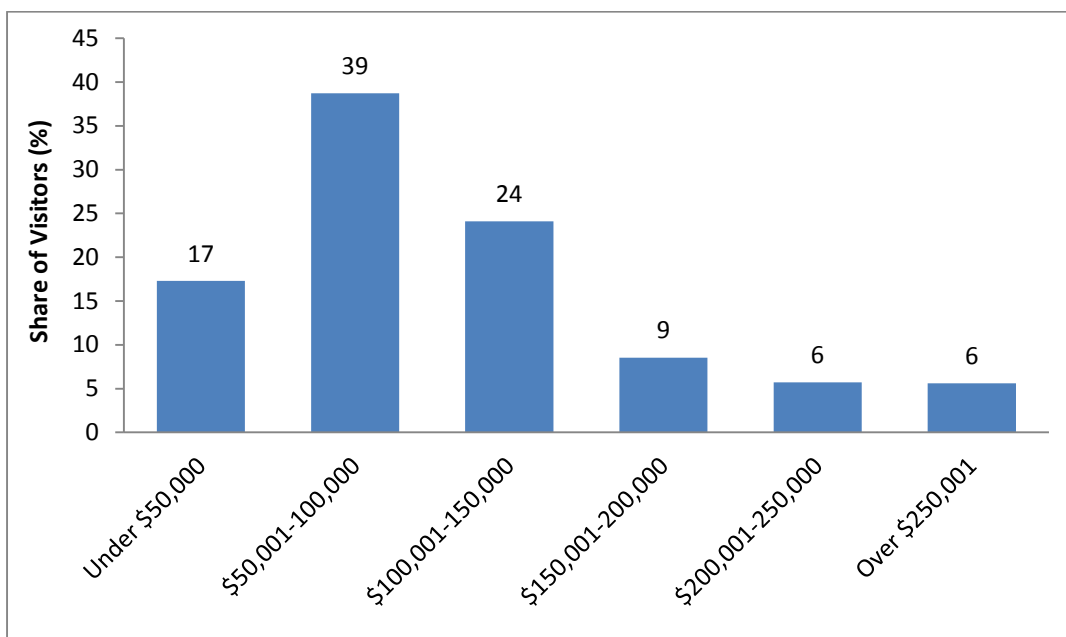
Visitors are well educated. More than two-thirds (69%) of the visitors surveyed had some form of tertiary qualification and a further 23% completed education at high school (Figure 3).

Figure 3: Highest Qualification (n=1007)



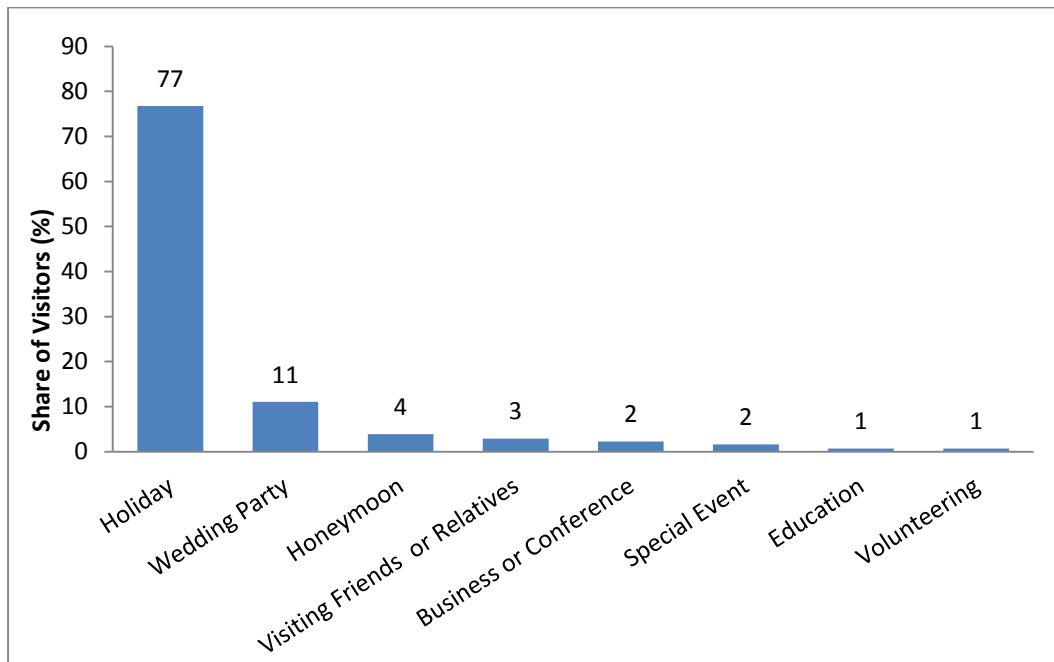
A significant group of visitors (39%) have an annual household income of between NZ\$50,001 and NZ\$100,000. One fourth (24%) earn between NZ\$100,001 and NZ\$150,000. A further 21% of respondents have a household income of over NZ\$150,000 per year (Figure 4). The latest national statistics show a mean New Zealand household income of NZ\$85,588.

Figure 4: Annual Household Income in NZD (n=855)



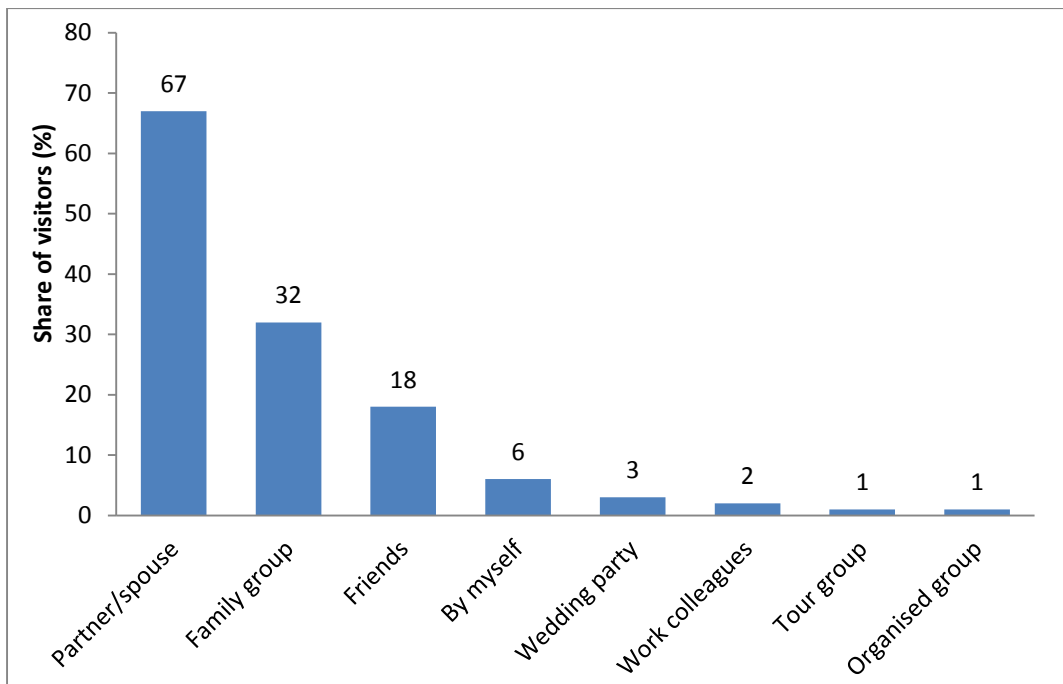
Three-quarters of visitors surveyed from July to September 2014 come to the Cook Islands for a holiday (77%), with the second major purpose of visit being to attend a wedding (11%). Four percent of respondents came for a honeymoon, 3% visited friends/relatives and 2% came for business/conference travel. Just 2% of survey respondents came for a special event (Figure 5).

Figure 5: Main Purpose of Visit (n=1103)



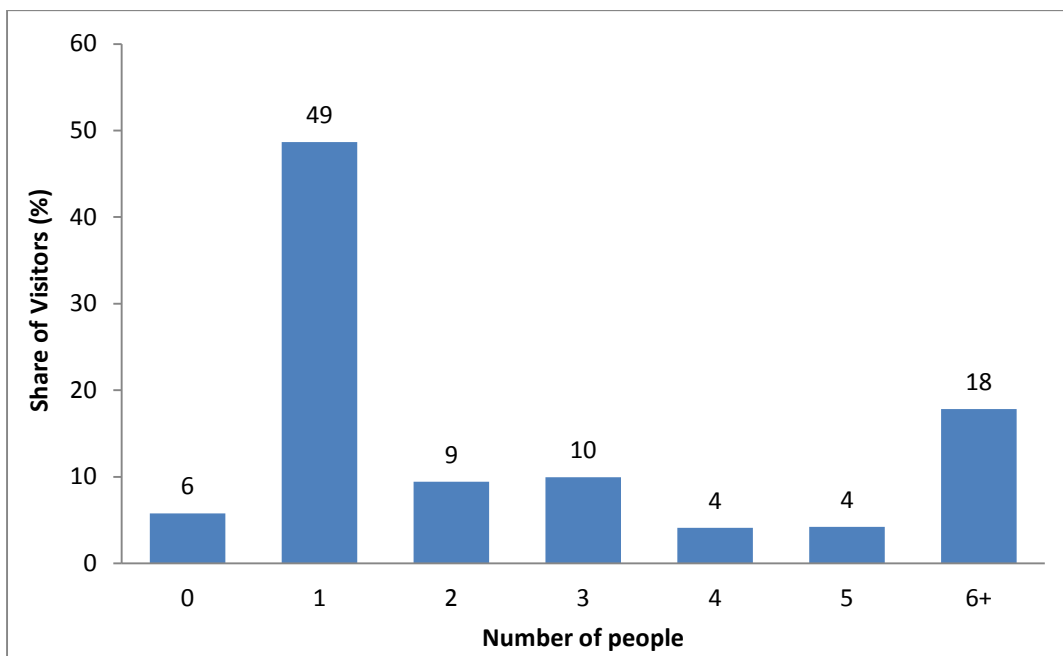
Just over two thirds (67%) of the visitors surveyed travel to the Cook Islands with a partner or spouse. Visitors also often travel with other family members (32%) or friends (18%). Those travelling alone, with a wedding party, with colleagues, or with an organised group, represent a smaller share of the sample (Figure 6).

Figure 6: Travelling with whom? (n=1098)



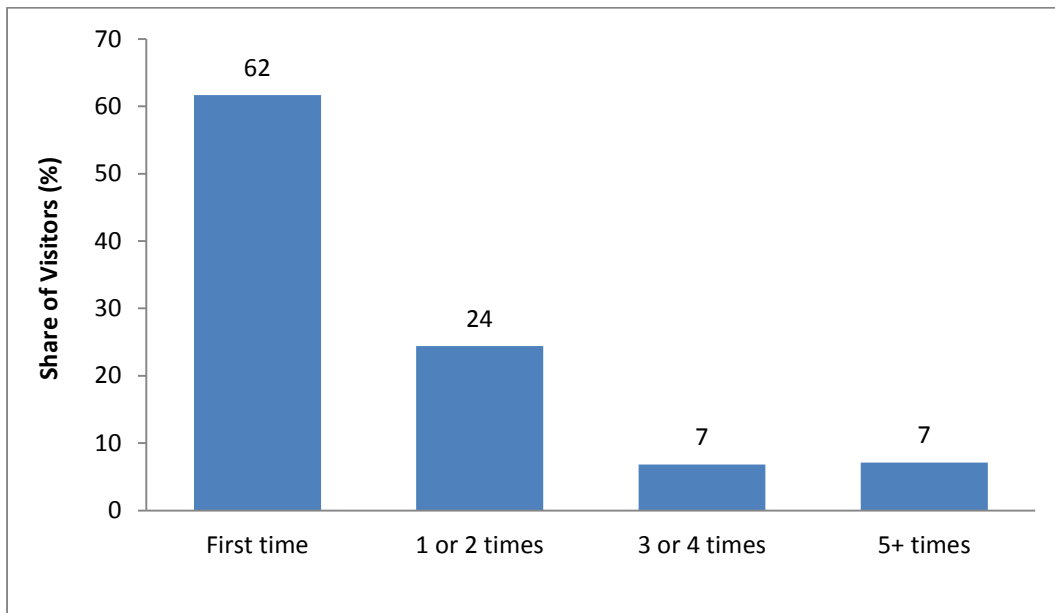
Nearly half of the visitors (49%) travelled with one companion on their visit to the Cook Islands (Figure 7). Travel groups larger than 4 people were not very common, with the exception of wedding parties.

Figure 7: Number of Companions on trip (n=1093)



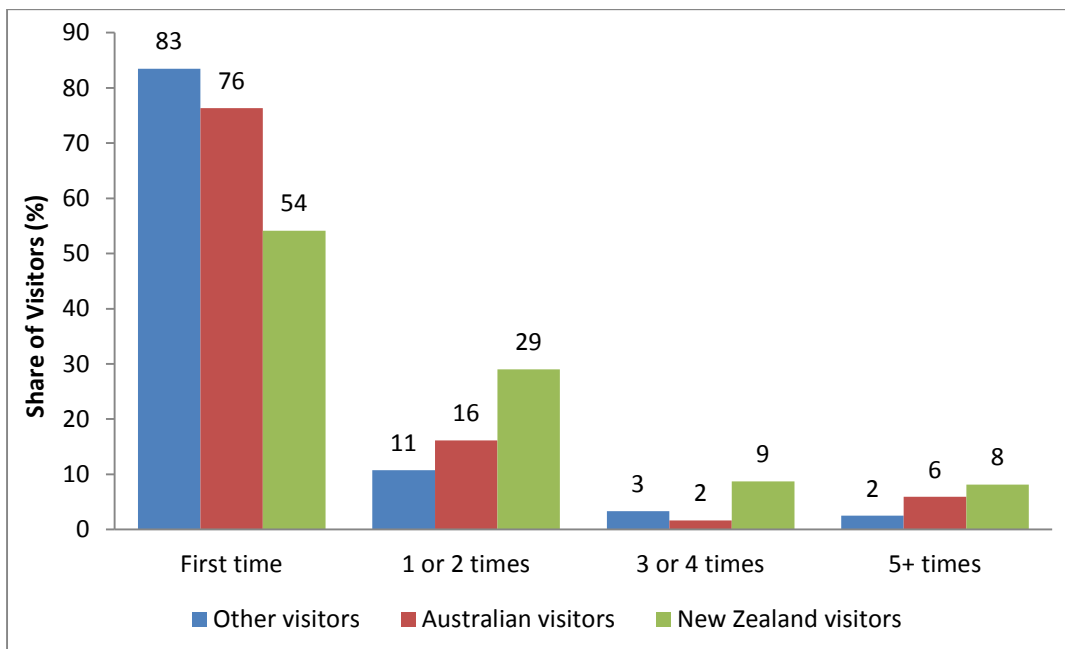
Most visitors (62%) are on their first visit to the Cook Islands. A further 24% have been to the Cook Islands once or twice before. A smaller group (14%) have visited 3 or more times (Figure 8).

Figure 8: Number of visits to the Cook Islands (n=1012)



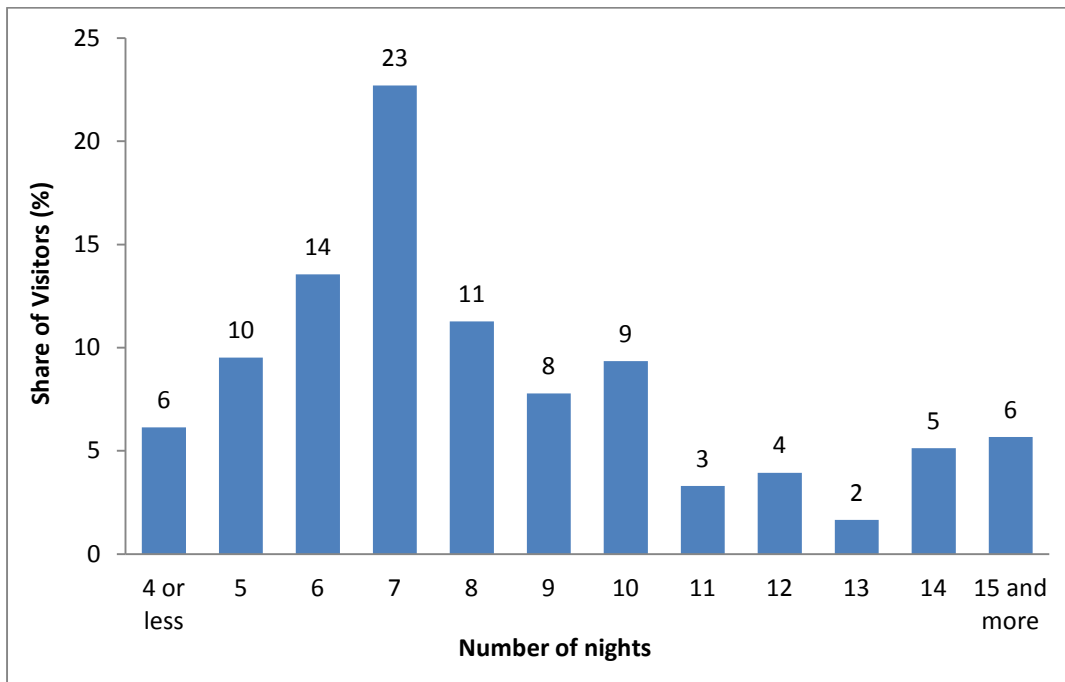
New Zealanders are more likely to be repeat visitors than those from other source markets (Figure 9). Twenty-nine percent of New Zealanders have visited once or twice before compared to only 16% of Australians.

Figure 9: Number of previous visits to the Cook Islands (n=1007)



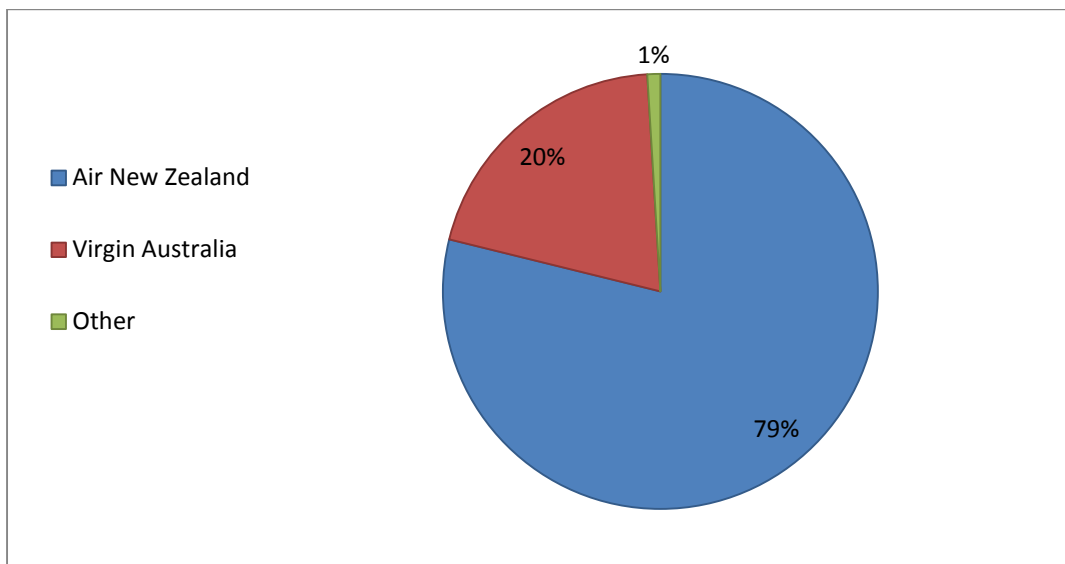
The average length of stay in the Cook Islands is 8.5 nights with 80% of visitors spending 1 to 10 nights in the islands (Figure 10).

Figure 10: Length of stay in nights (n=1083)



Most visitors (79%) travel to/from the Cook Islands with Air New Zealand, a further 20% 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=1091)

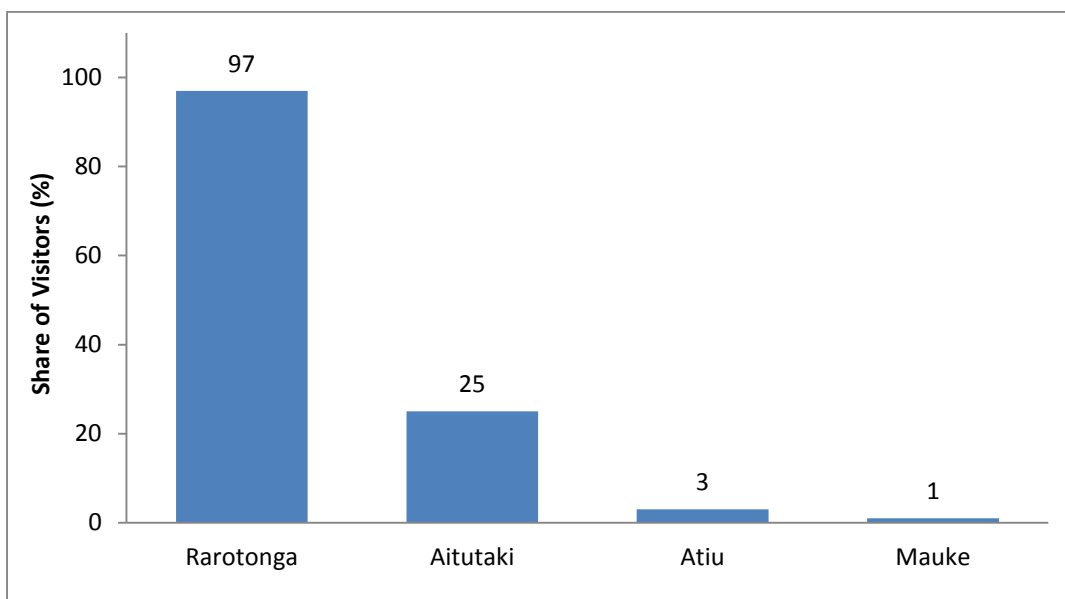


For 89% of visitors, the Cook Islands represent the only destination on their trip. For 11% of visitors the Cook Islands is part of a larger journey such as an around-the-world trip. When this group of visitors were asked about other destinations that were including on their journey the top destination mentioned was New Zealand (63%), second was Australia

(mentioned by 36% of respondents), followed by other Pacific Islands (29%). Just under one quarter of visitors (22%) stated that a destination in Asia was included as part of their larger trip and 20% mentioned USA. Other destinations mentioned by respondents included South America (9%), Europe (5%), Canada (2%) and other countries (6%).

The majority (97%) of visitors to the Cook Islands spend time on Rarotonga, while Aitutaki is the second most visited island (25%) (Figure 12). The other islands did not feature often in the survey responses.

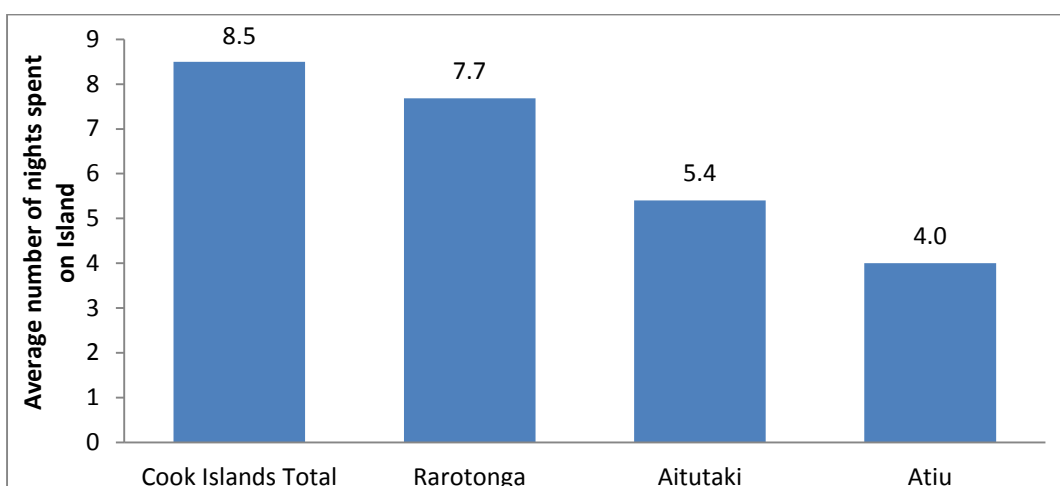
Figure 12: Visited Islands (n=1101)



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

The average length of stay on Rarotonga is 7.7 nights (Figure 13). For the visitors that went to Aitutaki, the average number of nights spent on the island is 5.4. These figures are consistent with the annual average for 2013-2014 staying in Rarotonga (7.8 nights), but slightly lower than the annual average for 2013-2014 staying in Aitutaki (5.6 nights).

Figure 13: Average length of stay in the Cook Islands (n=1094)

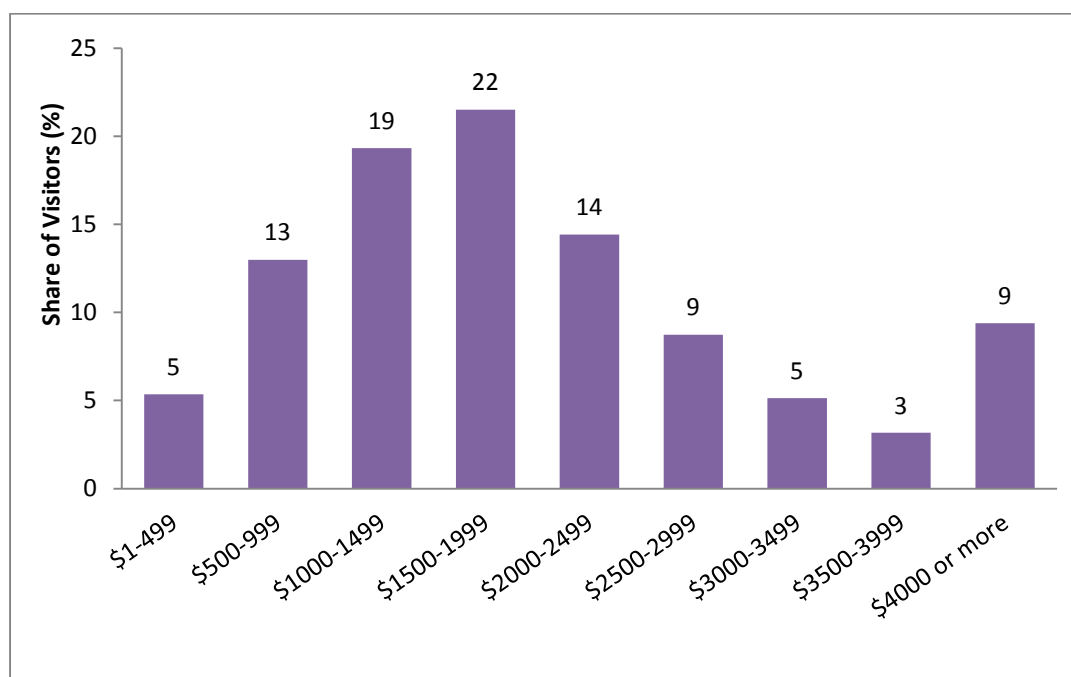


Visitor Expenditure

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 any others they spent money on (e.g. spouse, children). The following pre-paid expenditure section is based on the number of adults and children that respondents included in their cost estimates: 2288 people comprising 2066 adults and 222 children.

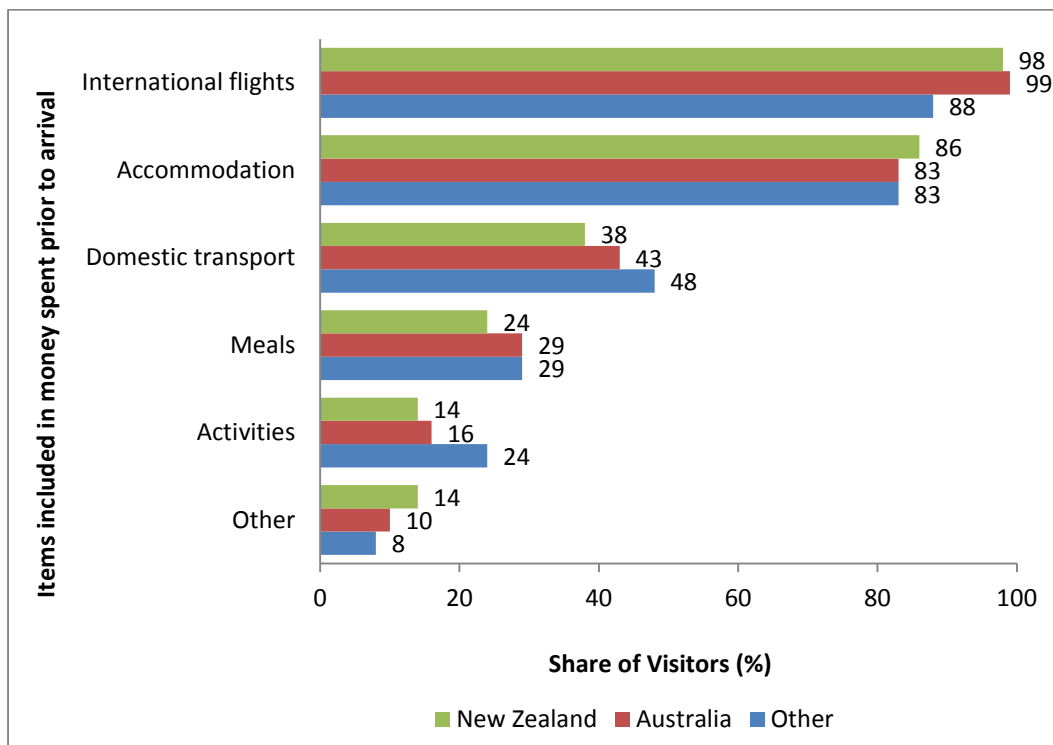
On average, visitors to the Cook Islands spend NZ\$2,121 per person prior to arrival. Most (55%) of the visitors spend between \$1000 and \$2500 dollars. These figures is slightly higher than the data from the previous year (average spend of NZ\$1,985 for 2013-2014) (Figure 14).

Figure 14: Amount of money spent per person prior to arrival (n=916)



Besides international flights and domestic transport, spending prior to arrival usually includes accommodation: in 86% of the cases for New Zealand, and 83% for Australian visitors and visitors from other countries (Figure 15). Meals and activities are less likely to be included in pre-paid expenses.

Figure 15: Items included in money spent prior to arrival (n=913)



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 pre-paid spend is allocated to airfares, and that 80% of the remaining 50% of the pre-paid spend flows back to local operators. In total this means that for every pre-paid dollar, 40 cents flows to the Cook Islands. We assess that the pre-paid spend figure per day, excluding flights, is \$100 and for the entire visit is \$848.

The total spend per visitor per day while in the Cook Islands (excluding any pre-paid expenditure) is \$108 (Table 1). This figure is comparable to the overall spend figure for 2013-2014 (\$111), but is lower than the previous quarter (\$115 for Apr-Jun 2014). Most money spent locally is on restaurants, cafes and bars (30%), accommodation (23%), shopping (13%), and activities (9%). These per person expenditure figures are based on 922 survey responses covering a total of 2313 people (2086 adults and 227 children).

By multiplying daily spend by the average stay (8.5 nights) it is clear that each visitor spends on average \$917 during their time in the Cook Islands. The total figure of what is spent locally and what flows back to the Cook Islands from pre-paid expenses is \$208 per visitor per day (\$108 + \$100), or \$1,765 (\$917 + \$848) per personal visit.

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

Expenditure Items	Overall n=922	
	Mean (NZ\$)	(% of spend)
Restaurant, cafes and bar	32	30
Accommodation	25	23
Shopping	14	13
Activities	9	9
Vehicle rental	8	8
Groceries	8	7
Domestic flights	3	3
Other	3	3
Cruising	2	2
Petrol	2	2
Public transportation	1	1
Total expenditure per person per day	\$108	100%

Table 2 provides an overview of the in-country expenditure by visitor country of origin. Australians and Americans/Canadians spend more than other countries. Europeans spend the least.

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

Expenditure Items	n=45	n=162	n=646	n=45
	USA/ Canada	Australia	New Zealand	Europe
Restaurant, cafes and bar	28	32	34	28
Accommodation	36	30	24	24
Shopping	15	13	14	16
Activities	8	10	9	8
Vehicle rental	6	8	9	7
Groceries	8	9	8	6
Other	1	3	3	2
Domestic flights	6	4	2	8
Petrol	1	2	2	1
Cruising	1	3	2	3
Public transportation	1	1	1	1
Total spend (NZ\$)	\$113	\$115	\$107	\$102

Average Australian spend per person for this quarter (\$115) was slightly lower compared to the 2013-2014 average of \$125. New Zealanders on the other hand spent less in the

previous year (average of \$103 for 2013-2014) – compared to \$107 per visitor per day for the July to September period covered by this report. European visitor spend at \$102 per person per day was down from the average of 2013-2014 of \$138. USA/Canada spend of \$113 for this period was lower than the 2013-2014 average of \$136. Given the fact that only 45 visitor from Europe and 45 Visitors from North America participated the survey, the average expenditure of these two regions is not likely to be representative.

Visitor Satisfaction

Visitors were asked to indicate their overall satisfaction with their experience of the Cook Islands on a scale from 1 'very dissatisfied' to 5 'very satisfied' (Figure 16). Two thirds (66%) of the visitors surveyed ranked their experience as 'very satisfied' (down from the 71% 'very satisfied' in the annual average for 2013-2014). Very few visitors (2%) were unsatisfied with their trip and gave a score of 2 or lower.

Figure 16: Overall satisfaction with experience of the Cook Islands (n=1010)

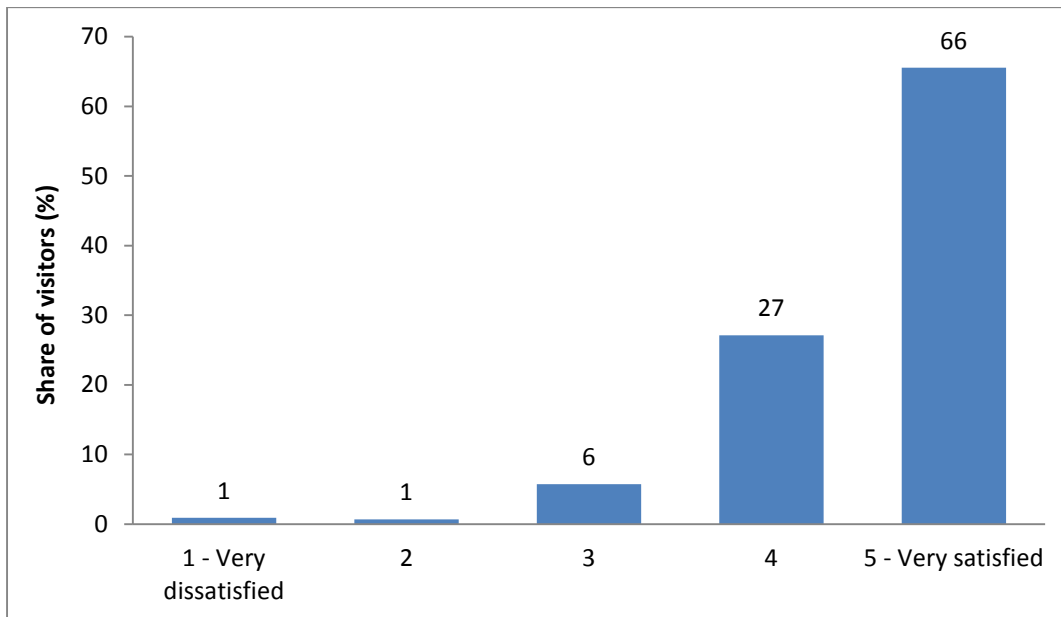


Figure 17 shows the percentage of respondents who undertook an activity while on their visit to the Cook Islands and Figure 18 shows their level of satisfaction with these activities. Almost all visitors participate in water activities and visit at least one restaurant or café during their trip. Most of the respondents (83%) visit a local market, and 65% 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 4.6) followed by water-based activities (4.5), land-based activities (4.5) and shopping (4.3). It should be noted that some activities e.g. kitesurfing, bonefishing, ocean cruise, and Tumunu on Atiu are characterised by relatively low levels of participation (n=21-40).

Figure 17: Degree of participation in activities (n range=21-1060)

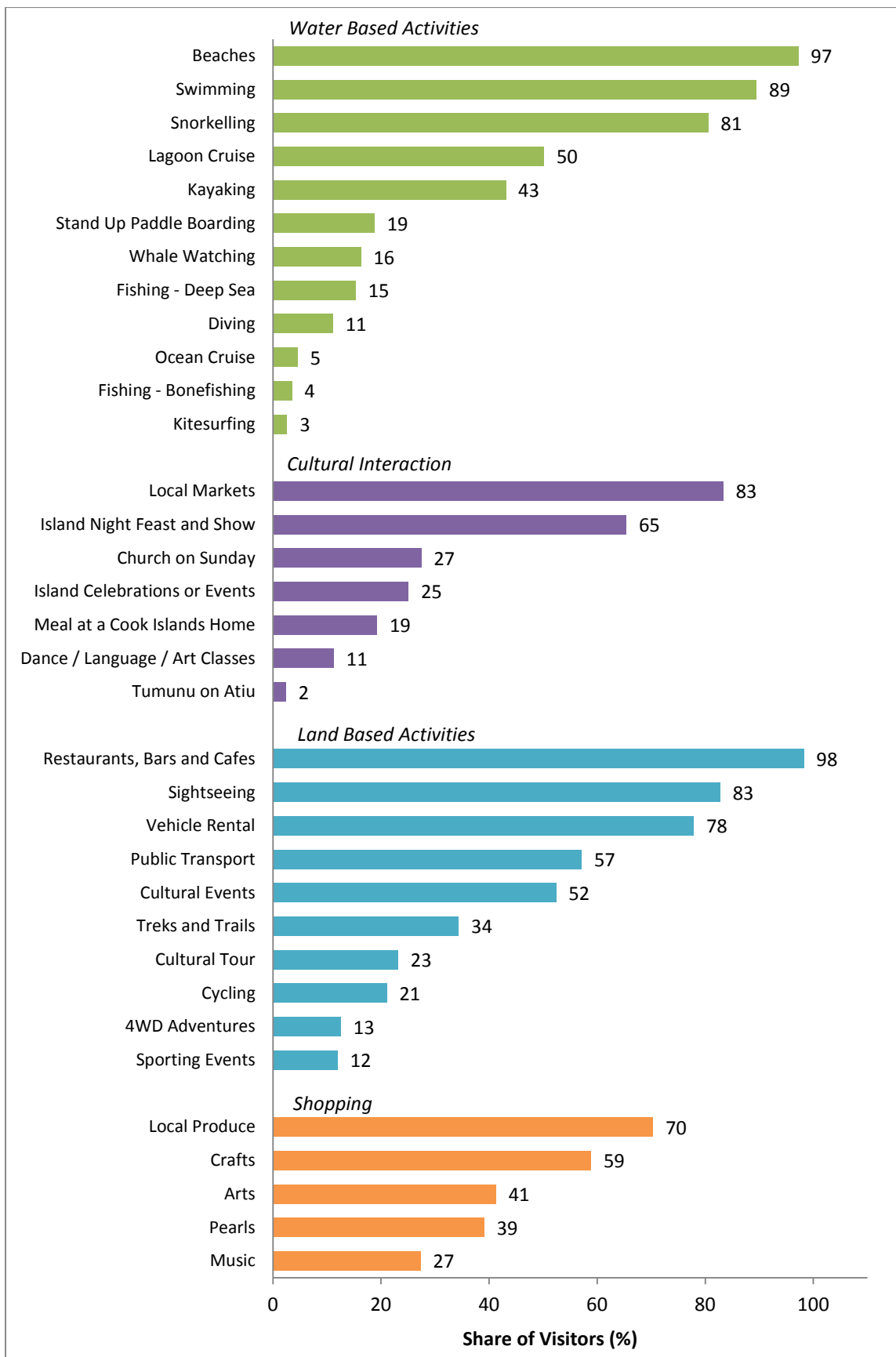
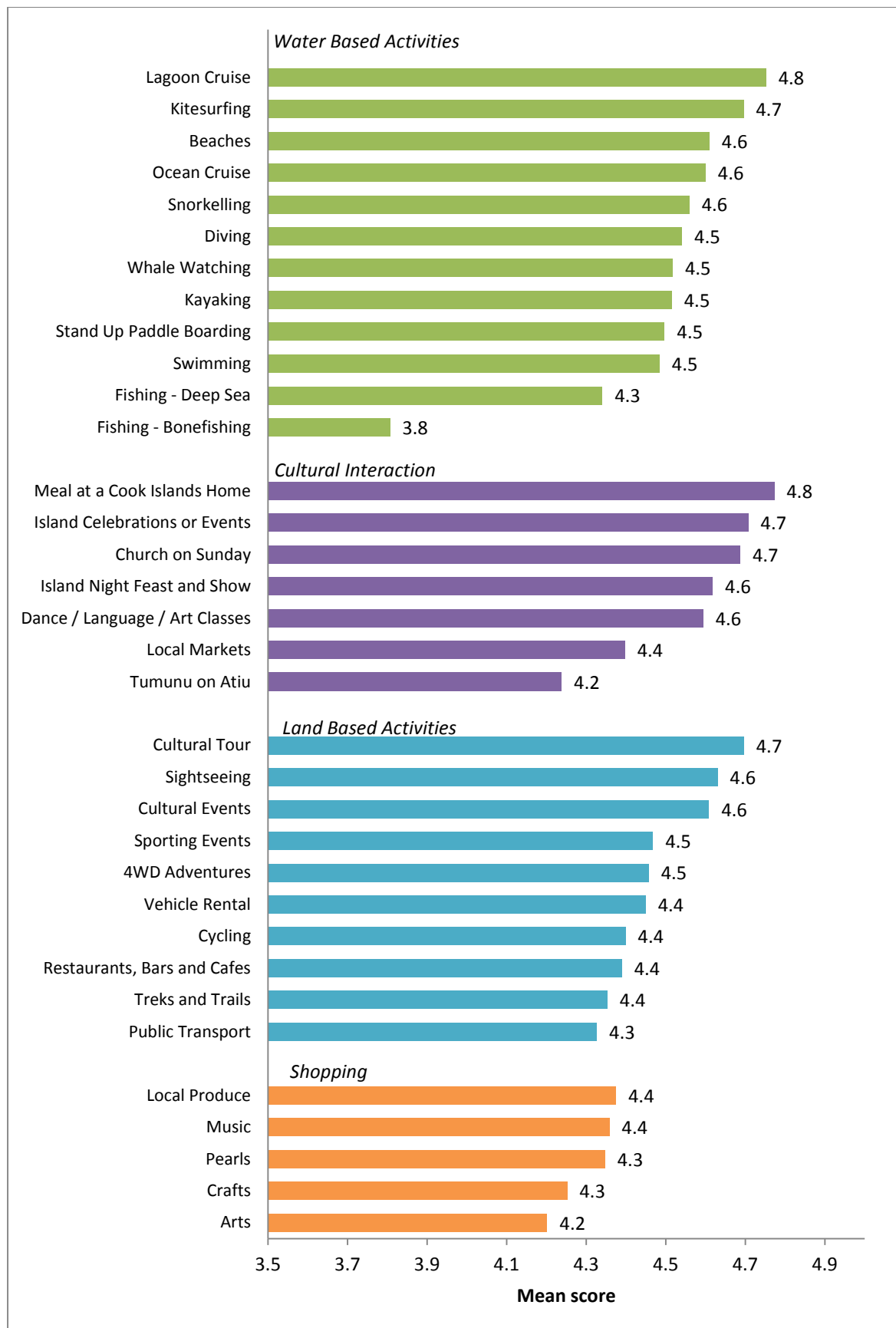
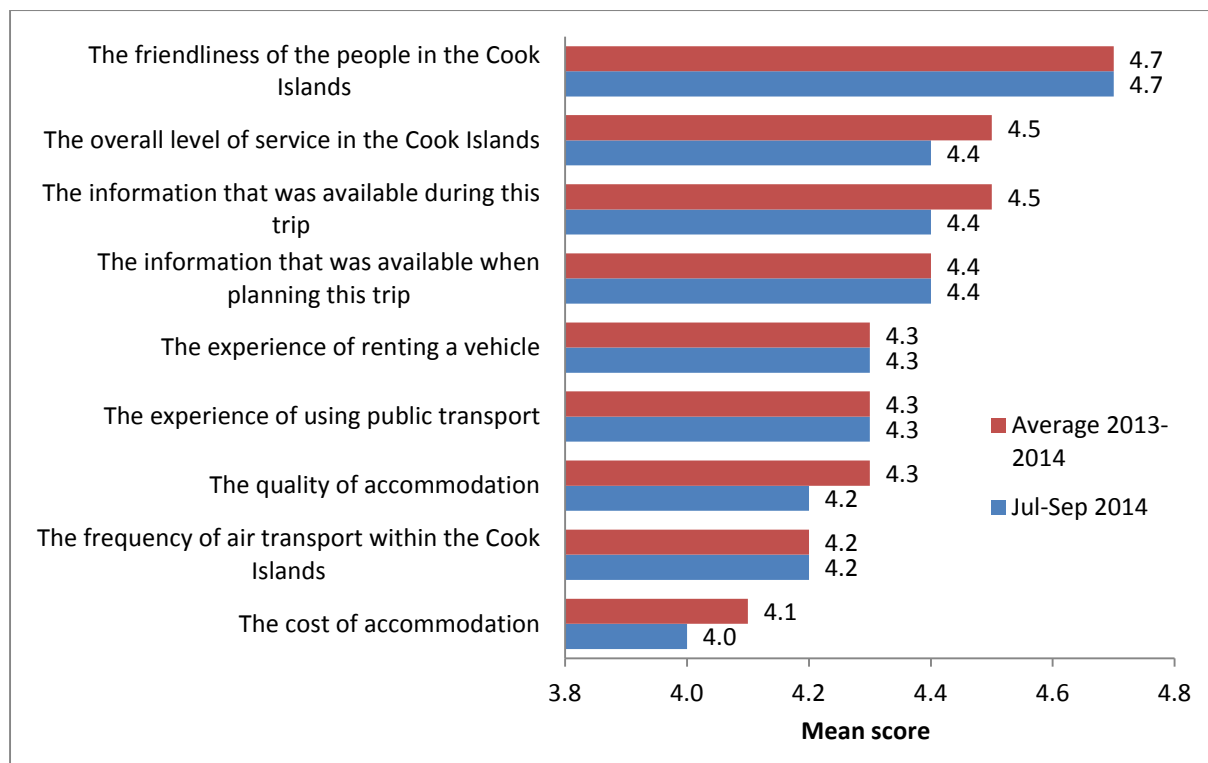


Figure 18: Degree of satisfaction in activities (mean score out of 5)



Visitors were asked to rate their level of satisfaction with nine different statements relating to their most recent visit to the Cook Islands (Figure 19). Responses from the period July to September 2014 are compared to the average for 2013-2014 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 local air transport and the cost and quality of accommodation. In no cases though do scores fall below 4 out of 5. There is a slight but noticeable trend towards a lower level of satisfaction across some items for the current quarter compared to the average for 2013-2014.

Figure 19: Degree of satisfaction with Cook Island services (mean score out of 5) (n=1098)



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, the peacefulness and relaxing atmosphere of the islands, and activities and entertainment. Smaller numbers of visitors mentioned food and beverage, the level of service, the un-commercialised nature of the islands, overall good experience, accommodation and convenience as a destination. These figures compare well to the annual average for 2013-2014 where respondents rated the top three most appealing aspects as the ‘environment’ (50%), ‘local people’ (43%) and the ‘atmosphere’ (30%).

Table 3: Most appealing aspects of the Cook Islands (n=1032)

Themes	Share of respondents (%)
Environment	53%
Local people	45%
Atmosphere	33%
Activities, attractions, entertainment and events	31%
Food and beverage	10%
Level of service	8%
Un-commercialised	7%
Overall good experience	7%
Convenience of the Cook Islands as a destination	5%
Accommodation	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%.

Environment

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’, ‘unspoilt’, ‘lovely’, ‘clean’, ‘spectacular’ and ‘magnificent’ 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:

“Most beautiful beaches”

“The beach, the lagoon, the climate, the fish in the lagoon, the trails through the centre of the island”

“Quality of the sea, clean, loads of fish, reefs intact”

“Beautiful weather, warm clear tropical waters and a myriad of tropical fish in the lagoon as well as the unspoilt nature of Rarotonga”

Local people

A large number of respondents (45%) noted that the most appealing part of their visit was the interaction with the local people in the Cook Islands. Emphasis was placed among 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’, ‘wonderful’, ‘respectful’ and ‘genuine’. Comments included:

“In general the Cook Island people are lovely happy smiling and accommodating”

“The friendliness and welcoming of the local people”

“All the locals super helpful & friendly”

“The people...my goodness....if everyone in the World treated you like the Cook Island People....what a beautiful place this world would be”

“We loved the idea of getting amongst the locals and didn't want an over touristy destination. The locals are the nicest people we have met.”

“I found the people to be extremely welcoming and friendly. I felt they were genuinely interested in talking to me, telling me about their experiences and asking me about my life. It wasn't about gaining something from me, just about a positive, interesting interaction.”

Atmosphere

One third (33%) of survey respondents focused on the relaxed atmosphere of the Cook Islands. They considered the Cook Islands to be very peaceful, safe and laid-back. Respondents used words such as ‘laid back’, ‘relaxing’, ‘easy’, ‘safe’, ‘slow pace of life’, ‘peaceful’, ‘simplicity’ and ‘warmth’ to describe the overall atmosphere. The notion of ‘island time’ was also frequently highlighted. Comments included:

“Overall relaxed island life”

“Laid back feel of the island. Nothing was hurried yet everything went like clockwork with transfers etc.”

“The friendliness and very relaxed atmosphere which was what we were looking for in our vacation. Nothing was too much trouble and there was always a smile.”

“Cook island time ... just the way of life”

“The relaxed pace of life”

Activities, attractions, entertainment and events

Activities and entertainment were mentioned by 31% of respondents as the most appealing elements of their Cook Islands visit. Most comments in this category focus on water-based activities such as walking on the beach, swimming, snorkelling and lagoon cruises. Land-based activities that respondents mentioned included the experience of travelling around the island by scooter, shopping, visiting the local churches, cultural tours and local markets. Comments included:

"The lagoon cruise in Aitutaki was absolutely sensational! Best bit of the whole amazing holiday!"

"The lagoons in Muri are beautiful - love the options of activities that can be done there too."

"I enjoyed attending local gatherings i.e. Church, fundraisers, markets, Atiu item preparation for the constitution celebrations."

"Lagoon cruise and snorkelling and chatting to the locals on the cruise boat"

"Loved snorkelling and swimming with huge fish"

"The island cultural nights!"

"Joining the umu feast with papa George at the market place"

Food and beverage

Ten percent of the respondents mentioned 'food and beverage', adding that they found these to be excellent, tasty and of high quality - especially local, fresh produce. Many visitors commented on the great selection of good cafes and restaurants and the good choice of food available. Comments included:

"The excellent food options of restaurants, markets, etc."

"Indigenous food, i.e. ika mata, taro leaf spinach"

"The local food that is appearing in restaurants and cafes"

"The range of eating places is very good, and the food well prepared, so we ate out most days"

"Food was great, local produce excellent, the fish was fabulous!!"

"The restaurant was AWESOME and the service was AMAZING. It really made our trip"

Level of service

Eight percent of visitors commented on the service they encountered while in the Cook Islands as being an appealing feature of their trip. Respondents had positive things to say about the local hospitality, especially mentioning the friendly staff they encountered at restaurants/bars/hotels. 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:

"The people were genuinely friendly and the service was better than anywhere else in the world that I have experienced"

"The friendliness and welcoming of the local people. The staff at the resort made us feel more like Family than strangers or clients."

"Very nice, welcoming and friendly people (staff at hotels, restaurants, shops)."

"Great hosts at our accommodation who were very informative about stuff to do and see. Friendly welcome at the airport with the lovely gentleman playing the uke and singing"

"Lack of hassles with booking rental car/accommodation and tourist events"

"The humour of bus drivers"

Un-commercialised

Seven percent of 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:

"That it has maintained its culture and character and isn't another beautiful place with all the same shops, hotels and restaurants."

"The fact that tourism has been embraced in a very low key way without spoiling the cultural and environmental appeal of the islands. People are very customer focused without being too pushy- a nice balance."

"Very natural. No Raro-Vegas! Loved it"

"Peaceful and safe place to visit. Not overly developed for tourism. Not overcrowded."

"I felt that the Cook Islands are special because they were not invaded through mass tourism. I appreciated that there were no huge Hotels, no big Groups of partying and/or drinking people."

Overall good experience

Another seven percent of respondents simply stated that their whole experience was a good one. Visitors expressed their positive experience with 'love everything', 'just amazing' or 'we will be back'. Comments included:

"I can't pin down any one thing. This is my 5th visit and the island was clean, everyone really friendly and helpful."

"It was most wonderful experience"

"Just totally enjoyed the visit and will be back for a longer stay next year"

"Just amazing. Loved it"

"The beauty of the Aitutaki lagoon, the friendliness of the people... especially in Aitutaki, the easy way to get around the island, the small amount of tourists on the islands, the snorkelling and the hiking...almost everything! ;)"

"Rarotonga is my most favourite place on earth. 3rd time visiting"

"Loved being there, cannot wait to go back"

Convenience

The convenience of the Cook Islands as a travel destination was mentioned by a small proportion of respondents (5%). In particular, they referred to the ease of getting around the islands, the convenience of using the New Zealand dollar and the lack of language barrier. Comments included:

"Ease of travel, NZ money, small island"

"The fact that holidaying here is so easy (flight time, currency, language etc.)"

"The ring road system which made travel around the Island so easy"

"Being able to walk to most places"

"Freedom to move about on scooter"

Accommodation

A further 5% 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 'fantastic', 'beautiful' and 'amazing' referring to the quality of the offering, the setting and welcome from hosts. Comments included:

"The resort - fantastic food, beautiful sight and amazing service"

“The view from the resort room. Breath taking absolute paradise. Felt like I was in a dream”

“Resort on Rarotonga beautiful landscape, breakfast under that white tent on the beach early am. Resort staff extremely friendly.”

“Opportunity to relax at resort - beach front room “

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 under 20% of the visitors took the trouble to note that they found nothing was ‘unappealing’, that ‘everything was amazing’, or that the only unappealing aspect was that they ‘had to leave’. This group of visitors responded with comments such as *“nothing”, “there is nothing least attractive or appealing”, “everything was just so magnificent”* and *“really loved everything about our holiday”*. There were, however, a number of areas that did attract comments (Table 4).

Table 4: Least appealing aspects of the Cook Islands (n=959)

Themes	Share of respondents (%)
Nothing	19%
Poor weather	13%
Stray animals (dogs, roosters) and mosquitos	12%
Food & beverage	12%
Accommodation	11%
Public services, facilities and infrastructure	8%
Local people and staff	8%
Rubbish and natural environment care	7%
Other	6%
Flight related issues	5%
Price of good and service	5%
Attractions and activities	3%
Rental cars or scooters	3%
Too touristy	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%.

Poor weather

Thirteen percent of survey respondents expressed their disappointment with the weather conditions while in the Cook Islands. In particular, complaints were made about the low

temperatures and the amount of rain, although a number of respondents acknowledged that this shortcoming was due to the season and cannot be changed. Comments included:

"Weather on that particular trip, not a good time of year to go"

"The least appealing thing about our trip was the unseasonal weather"

"The weather was windy and cold"

"Out of your control but we had a few days of rain"

Stray animals

The stray dogs, noisy roosters and mosquitos continue to be an annoyance or a worry for 12% of respondents during their time spent in the islands. This figure is similar to the last annual average (12%). Other animals like cats and pigs were also considered a disturbance. Respondents used a variety of words to describe this theme including 'roaming', 'barking', 'unhygienic' and 'care'. Comments included:

"Roaming and noisy dogs. Roosters crowing early in the mornings. Mosquitos."

"The dogs that roam around. I like dogs but it was a little frustrating when we'd be at an eatery and dogs would come around the table. Unhygienic."

"Still the way animals are treated in a barbaric way...dogs tied to trees with a short rope & starving shameful pigs in tiny confines with no water readily available...shameful to experience...goats tethered by rope around the feet...enough land in Rarotonga to have animals free ranging in a small paddock and secure fencing. THIS IS THE TOPIC THAT IS RAISED MOST BY TOURISTS IN OUR PART OF NZ...we warn friends to see this so they are aware...shameful as in 8 years of visiting nothing much has changed. Tourism relies on word of mouth & we LOVE your island...please consider educating people who are obviously not farmers."

"The wild roosters waking me all night every night. These were soooooo annoying and I know everyone else at my accommodation felt the same. They crowed all night and there were many roosters around where I stayed. They were the only thing that put a damp re on my trip."

Food and beverage

A number of visitors (12%) commented on the cost, quality and availability of food and beverage in the Cook Islands. Respondents noted that food was 'expensive' and that there was a 'lack of fresh products'. They would like to see more fresh and local produce and less westernised takeaway foods. Responses included all options such as restaurants, resort dining and shops. Comments included:

"Got food poisoning after 1 meal and didn't eat there again"

"BY FAR, the worst thing on the island is the food!"

“Local Food Availability: I wanted to be able to eat “local” food, from restaurants and also from road-side stalls, but there was none. To get local food I HAD to go to the Island night. But to be able to eat local food only 1 meal, out of the many meals we had while there, was certainly disappointing.”

“The prices are not really backpacker-friendly, made it for example hard to try local dishes...”

“Lack of quality dining options. Many restaurants served stuff brought in from NZ. Even the resort served imported prawns rather than local seafood. Disappointed we couldn't try local crab as we saw them everywhere - some locals said they eat them.”

Accommodation

Eleven percent of visitors commented on the high cost and poor quality of accommodation. Visitors surveyed mentioned that the cost of accommodation is expensive for the value received, that some accommodation places are in need of an upgrade and that there has been some safety issues. Comments included:

“Standard of facilities did not measure up to the claimed (and priced) 5 star accommodation”

“The guests at our resort, someone trying to get into our accommodation in the middle of the night, the disinterest of the receptionist when we informed them of our experience. The general lack of concern about other guests during the night with the noise disturbing other guests.”

“The resort was a great place, the food was wonderful but it needs to be updated as it is looking tired cracked tiles etc in our bedroom.”

Local people and staff

A number of visitors (8%) found that the local Cook Island people did not seem as friendly towards visitors as they used to be and complained about the quality of staff. This number is higher than the 2013-2014 average (5%). Visitors surveyed commented on how customer service in general was poor, and the local people were not friendly to visitors – with the visitors getting the feeling that the local people are grumpy and do not appreciate the tourists coming to the Cook Islands. Comments included:

“Lack of clarity in communication about how much of our collective catch we could take home from the chartered fishing trip. The skipper was aggressive when I said I'd like to take four fillets from two tuna to share with locals who were friends and with family (tourists) on the island.”

“The unfriendliness, it's just a job to them, no smile no please & no thank you sometimes it felt like I was intruding, just by getting on the bus.”

“People were generally very unwelcoming and didn't seem interested in us. It was really weird because usually people appreciate tourists who bring money to the islands. Also someone tried to break into our Bungalow in the middle of the night. That was the scariest moment in our around the world trip.”

Other unappealing aspects mentioned by visitors include: rubbish and natural environment care, flight/airline related issues (flight arrival and departure times), price of goods and services (high cost, poor value), attractions and activities (disappointing), rental cars and scooters (quality, cost and service), becoming too commercialised/touristy (over-developed, arrogant tourists) and other issues (safety, poverty, traffic and state of buildings). Comments included:

“The intense tourist accommodation building that was going up along Muri Beach, the resultant lack of easy access to the beach and possible pollution of Muri lagoon”

“To be honest, we can't wait to go back, but the most frustrating thing is the air travel. Coming from Melbourne via Auckland, we landed at 1:55am in Rarotonga which was a night's accommodation and similarly on the way home, we left at midnight and luckily had hired a car which we could keep our bags in.”

“Cost increases compared to other countries, especially Aitutaki. We would love to go back there as that is where we had our honeymoon, but the accommodation cost is becoming ridiculous when you compare to other countries for similar level of accommodation”

“Aitutaki snorkelling was not much to see I expected more like the brochures say.”

“Vehicle rentals... they say one thing on their flyers but it doesn't give any more details. So we went to one as it said that things were a certain price, then after walking half an hour to get there they told us that it didn't include scooters despite no other mention of it... Made the first day quite unpleasant.”

“Everything seemed so geared to tourists, not much local businesses, not much local interactions except where you were being served. Not much local art or crafts.”

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

“I experienced a theft of \$440 American dollars cash from my room. A police report was made prior to departure. I was told I would receive the formal report by mail within one week. I have not had any additional contact. I did receive an apology from the owner. I am a frequent traveller to the South Pacific - this was my first trip to Cook Islands. Save for this experience, I was prepared to return as all other

aspects of my trip exceeded expectations - but this experience put a negative pallor on the trip."

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 (46%) of the respondents said 'yes'. Suggestions mentioned by respondents focused on entertainment, activities and transport (16%), weather (16%), public services and infrastructure (15%), accommodation (13%), visitors regretting they did not stay longer (11%), quality and cost of food and beverages (11%), flight schedules in and out of Cook Islands (9%), friendliness of locals and service levels (8%), environment/safety/animal care (7%) and other (7%). Comments on these themes included:

"The cost of the public transport is quite high, particularly if you use it frequently (more than a return trip). We saw some people had concession tickets, so perhaps more information about that would be helpful."

"Information at the Airport about the local bus service especially when it's not running because of a local holiday. Taxis that charge for the distance and not per person."

"Would love to have seen, or found some weaving, traditional not imported! More crafts being produced by locals, and being able to locate them more easily, not just who is at Saturday market."

"If it was a little warmer, more sun, less rain."

"Knowing we needed to have a special drivers licence"

"Better signage on the cross-island walk and perhaps more options for walks/biking"

"More upscale accommodation still in keeping with the culture and tradition of the island"

"The food - please! Please increase the general availability (in restaurants & road-side stalls) or local food. AND - please try to decrease the price of food (restaurants)."

"Better flight times to and from the Island."

"I would have loved to have the opportunity to visit other islands, but felt the cost of a day trip to explore was unjustifiable"

"Staff need to be a little more people friendly in some places"

"Some areas walking next to the road are overgrown with plants and need to be cut back to ensure safety"

“Only the dogs and Roosters, we slept with earplugs in.”

Reasons to return to the Cook Islands and recommend to others

The majority of visitors (91%) indicated that they would consider re-visiting the Cook Islands. This figure is slightly lower than the 2013-2014 annual average of 94%. Most of the respondents thought the Cook Islands provided a wonderful experience due to the relaxed atmosphere on the islands, the unspoiled natural environment and warm climate, the overall great holiday destination and the welcoming and friendly local people. These four themes cover the major part of the responses.

Forty-two 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 ‘a great place to relax’. Visitors used key words such as ‘relaxing’, ‘unwind’ and ‘laid back’ – indicating the emphasis they place on the islands as a place to completely relax. Comments included:

“A holiday to me is being able to "RELAX" and that, I definitely did”

“It's become our place to get away from all the stresses of our work life - can depend on it for relaxation and can slow down”

“Absolutely. Great place to re-charge.”

“Lovely relaxing place, not hassled as a tourist to buy things”

“Because we love the atmosphere and the ability to just kick back and relax”.”

The warm climate and natural beauty of the Cook Islands was noted by one third (31%) of the visitors as a significant factor in leading people to want to return. The respondents enjoyed the beautiful unspoilt islands, the pristine waters and marine life, the lovely beaches, and the great weather. Comments included:

““For its pristine beaches, the beauty of the landscapes, the lack of mass tourism”

“It is one of the most beautiful spots on earth”

“It is beautiful and the water is beautiful and the swimming is lovely”

“Love the crystal clear water, amazing snorkelling”

A couple of respondents also mentioned that they would like to return to experience the Cook Islands in the sun: *“Had really bad weather the entire time we were there. Would like to experience Rarotonga with beautiful weather”*. Others noted that the unspoilt environment is a key attraction that needs to be preserved: *“The only reason I would return*

is to for the abundance and variety of fish so close to the shore. You must maintain/increase your marine reserve areas!!!!"

Those who stated that they had an overall great experience (28%) mentioned that their trip to the Cook Islands was 'amazing' and 'beautiful', and that they just 'love it!' Others commented that they 'had a great time' and that it was 'the perfect holiday'. Respondents also mentioned that they would 'definitely return', have 'already booked for 2015', that they will come back 'bringing family or friends' along, or that they are already long-time return visitors and 'will be back'. Comments here included:

"Had a fantastic time. Lovely climate and pace of life loved every minute. Our first trip overseas. Loved it!"

"OUR FAVORITE PLACE IN THE WORLD! We have travelled a lot but nothing compares to the beauty of the Cook Islands."

"Absolutely - it is an amazing place and one I can't wait to share with my family"

"We love it and have already booked for our holiday next year"

"We love visiting Rarotonga, have been 11 times already, and looking forward to our next visit"

Just under one quarter of the visitors (23%) identified the friendly, helpful and welcoming local people as a significant feature that encourages them to return to the Cook Islands. Respondents commented:

"Wonderful people, full of heart and good character"

"It was the most fantastic place we have ever been to. The people was the most loveable we have ever met."

"Because of the locals they were so awesome and easy to get on with very polite and great service"

Of those respondents (n=83) who said they would not be returning to the Cook Islands, the main comments were themed around that they felt they had seen what they really wanted to see in the Cooks and now wanted to visit other countries. Other comments focused on the high cost of the overall trip and the distance of travelling. Comments here include:

"Enjoyed it very much. We like to go to different places each year."

"This was my second time and I feel like I've seen most of what there is to offer"

"I would love to, but it was an expensive trip and we would probably choose to discover a new place."

"Fantastic location, but very far away from Europe"

The majority (79%) of the visitors surveyed mentioned that they would like to include the outer islands in their next visit. Two-thirds (68%) 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 15%; another 12% of visitors stated that they were '*not sure*' of which islands to include and 8% of visitors mentioned they would like to visit 'all the islands'. Other visitors mentioned they would like to visit some of the islands belonging to the Northern Group (5%) or the Southern Group (2%). 'Mangaia' was mentioned by 4% of visitors as future possible destination. Only two percent mentioned the high cost of visiting other islands as a barrier for not visiting.

Nearly all visitors surveyed (98%) said they would recommend the destination to their family and friends. Just under half (41%) of the visitors stated they would recommend the Cook Islands because of the 'atmosphere'; this was again described as '*relaxing*', '*peaceful*' and with the '*laid-back*' lifestyle. Respondents felt that the Cook Islands was a great place to chill out and recharge their batteries and they would recommend the Cook Islands as a good holiday destination for those who could do with a break away from their busy lifestyle. Another aspect of the relaxing holiday was noted as '*beautiful and relaxing but with enough things to do*".

Thirty percent of respondents stated that 'the environment' of the Cook Islands was a reason for recommending the island nation to others – including the beautiful scenery, the warm climate and the unspoilt nature – '*it is a beautiful piece of paradise with a lovely, relaxed lifestyle*'. Twenty percent of the respondents would recommend the Cook Islands because they had a great experience there themselves. These visitors stated the Cooks to be simply '*amazing*' and '*awesome*' and that they just '*loved every minute*' describing it as a "*beautiful place and a 'must see'*".

Almost a quarter (23%) of the visitors mentioned the 'friendly local people' as a recommendation of the Cook Islands. Other themes that were mentioned included the attractions and activities available (9%), the convenience of the islands as a destination – especially for New Zealanders and Australians (9%), the ease of the New Zealand currency and language (6%), affordability of the holiday (5%), that they already have recommended to others (5%), food and beverage options (4%), the islands being a family friendly destination (4%), the Cook Islands culture (3%) and the accommodation available (2%). Comments included:

"Not too over commercialised".

"Fantastic for the kids and safe.... very safe to take kids where you can let them be kids by themselves"

"Have already encouraged other friends to visit - some have already been and some still planning to go"

"The people there are very welcoming"

“The country is a jewel hidden away and hopefully never changes as it always feels home and very welcoming from the beginning of your trip to when you leave with Jake singing at the airport. A memory that no-one ever forgets”

“Despite the weather it was a nice destination, and my understanding is that it is cheaper than many of the other islands in the South Pacific which is a huge plus”

“It is truly an undiscovered gem in the South Pacific”

Only 2% of visitors (n=23) would not recommend the Cook Islands to others, with their comments generally based around the overall expense of the destination.

Final observations

This report shows that the Cook Islands tourism industry generally performed well during the July - September 2014 period. Visitor satisfaction levels and the desire for return visitation have remained very high, and it is clear that the destination is leaving a generally positive impression with tourists.

Nevertheless this report also highlights that there is room to enhance the visitor experience and to increase the economic yield and broader community benefits associated with tourism. As in previous reports, this research highlights issues around environmental degradation and infrastructure provision that should be monitored and managed carefully. There are also some concerns by visitors around the value for money/quality of service provided by accommodation and food/beverage operations. The on-going concerns around stray dogs should also be noted. Issues of petty crime are also mentioned by a very small, but consistent, number of visitors.

Visitor spend prior to arrival in the Cook Islands has increased slightly from the 2013-2014 annual average (\$2,121 per person up from \$1,985), and spend on the island (per person per day) of \$108 has decreased slightly from the 2013-2014 average (\$111).

Overall the Cook Islands tourism sector is performing well but it remains important to look at ways to increase visitor yield in a sustainable manner. The 2014-2015 annual report will review this theme in more depth.

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