1994

Profile of the scuba diving vacationer to the island of Bonaire

Paul William Howe

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PROFILE OF THE SCUBA DIVING VACATIONER TO THE ISLAND OF BONAIRE

by

Paul William Howe

A thesis submitted to the Faculty of the School of Food, Hotel and Travel Management at Rochester Institute of Technology in partial fulfillment of the requirements for the degree of Master of Science

September 1994
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THESIS COMMITTEE MEMBERS

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FORMER COMMITTEE MEMBER

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INTRODUCTION

The island of Bonaire, part of the Netherland Antilles in the Caribbean, is perceived to be experiencing a decline in their tourism arrivals of scuba diving vacationers from the United States. Tourism is an important export for the economic stability off Bonaire, with the scuba vacationing market accounting for up to 53% of total arrivals to the island (Tourism Corporation Bonaire). Economic impacts are filtering down to the working class, effecting the socio-economic climate of the island.

Bonaire has enjoyed being one of the premier scuba diving destinations on the Caribbean for many years. Its' clear waters, tropical climate, abundant marine life, ease of shore access, and calm seas on the leeward side of the island lend it to being a scuba divers paradise.

The Tourism Corporation Bonaire (herein called 'TCB') has shifted its' focus of target markets to that of upscale, European clientele. In the recent economic recession in the United States, combined with the war in the Gulf, many islands, hotels and attractions have shifted their strategies in this manner. The
reason for the high-end market is due to the amount of discretionary income and time the market segment has. Market share is becoming increasingly harder to obtain and sustain due to increased competition of this target market.

The Council of Underwater Resort Operators (herein called 'CURO') are interested in finding out who their clientele are, and where they are coming from.

The assessment of where Bonaire is in respect to product life cycle is also an important issue to be considered in this study. This may show the need for improvement of perceived image, as well as possibly infrastructure and/or superstructures.

BACKGROUND

Officials of the TCB and CURO have noted a slump in their scuba vacationers, and believe it is largely the United States market. This is also reinforced by board members of the Bonaire Hotel and Tourist Association (herein called 'BONHATA'). They have contacted Mr. Scott Wiggins, President of Cariba Marketing, to possibly market their destination.
Mr. Wiggins is very familiar with the island, as he was former Vice President of Marketing for Divi Resorts, which owned and operated the Divi Flamingo Beach Resort on Bonaire, as well as a scuba facility on premises.

Statistical data from TCB will be made available for the study. It is important to note that this data is an overall statistical analysis, not specific to the scuba vacation market. This will be important, however, to show the percentage of scuba diving vacationers compared to overall arrivals.

There have been no previous studies done intrinsic to the scuba vacation market segment in Bonaire by the TCB, CURO, or any other organization.

PURPOSE OF STUDY

The purpose of the study is to profile the scuba vacation market, especially concerned with geographic location of visitors.

The study was implemented in September of 1992 for a two week duration. The instrument was handed out by the members of CURO,
the dive operators, upon check-in at the respective facilities. This will guarantee that all divers on island will be asked to complete the survey, upon presenting mandatory proof of scuba diving certification at the start of their stay. Proof of scuba certification is mandatory in order to dive with an operator. This will offer a high response rate, as well as limit surveys to be administered to scuba divers only.

The purpose has a stratified two-fold purpose: 1) to identify who the vacationing diver is, and 2) identify their geographic location. The survey includes competitive information, as well as divers interests and experience. By profiling the dive market segment, TCB and CURO may more effectively market their destination to curtail the perceived slumping arrivals of the United States market.

SIGNIFICANCE

The study is of utmost importance to Bonaire, as tourism generates the majority of its' Gross National Product, of which the scuba market makes up 49-53% of the total tourism market (TCB). The analysis and resulting profile will be the starting point of a change in marketing strategies that may result in
Bonaire again becoming a prominent player in the United States scuba market.

STATEMENT OF PROBLEM

The island of Bonaire, in the Dutch Caribbean, has seemingly been experiencing a decline of their scuba vacation market from the United States. The European market is now being perceived as a major contributor, rivaling the United States. The TCB has been concerned with the perceived lag and changes in tourism arrivals, as the scuba niche accounts for 49-53% of their tourism revenues.

To plan a successful marketing strategy to position Bonaire as a prime scuba diving destination for United States divers, TCB wanted to implement research which will establish a basis for: 1) marketing strategies, and; 2) continued research for trend analysis.

Bonaire has a natural inventory of warm, clear waters combined with a tropical climate and abundance of marine life which is extremely conducive for scuba divers to enjoy their sport. They have enjoyed being one of the premier scuba vacation
destinations for a number of years.

There has been no primary research done intrinsic to the scuba market to date. Therefore, there are no exact counts of the number of divers, seasonality, or any profile derived for this particular market.

The TCB and the Council of Underwater Resort Operators (herein called 'CURO') wish to address the problem by having a survey designed and implemented to derive a profile of their scuba vacationers. They are concerned on any changes in their market mix.

The United States has been a large market share of their divers, by their rough estimates, although the European market has seemingly been a strong and steadily growing segment. With documented statistics of a visitors profile, Bonaire can be much more effective in their marketing efforts. Target markets will be clearly defined, with geographic definition of where their primary markets are traveling from.
PROCEDURES

Subjects: The population is all scuba vacationers to the island of Bonaire. The sampling is convenience; selected scuba diving vacationers to the island. The random selection is all divers on island, to prevent bias, during the two week window in which the survey is implemented on island.

Variables: Independent variable is the marketing strategies implemented. Dependent variables are the resulting visitor profile. Intervening variable is the ability of the destination/attractions to draw visitors to the island.

Data Gathering: The study collected evidence of tourism arrivals, especially historically correlated to the time frame of the survey. This is interfaced with the survey results.

Profiles of scuba diving vacationers are compared and contrasted to the analysis of the
survey.

A likert-scale is utilized for visitor profiles, and run through the SSPS-X statistical analysis program for verification and accurate statistical information.

Data Analysis: Data is presented by graphs, pie charts and tables. This allows the comparison and contrasts statistics of shifts and demands.

HYPOTHESIS

The study was conducted to profile the dive vacationers to Bonaire, and is believed to reveal that the United States scuba vacation market segment is declining, showing flourishing competition from the European contingency. While still a viable, strong market segment, it is believed that the study will prove the European market is also a major contributor to Bonaire's scuba vacation niche.
ASSUMPTIONS

The assumption here is that the United States market segment of the scuba niche has shown an apparent decline due to lack of knowledge of the market segment. It is assumed that the market share has declined, as there are no statistics to concretely show this.

Our assumption is that Bonaire will benefit by conducting this focused study of their scuba vacation market segment. This will enable them to more efficiently, effectively and economically plan marketing strategies, with higher response and conversion rates.

The potential downfall of this assumption is that we need to assess the product life cycle of Bonire as a diving destination, and shifting trends in dive travelers psychographic and behavioristic patterns.

DEFINITION OF TERMS

Target Market: A specific segment, that has similar
characteristics, of the entire market that is being focused on.

**Tourist Assets:** An attraction of interest to visitors, be it natural, historical, educational, or cultural.

**Profiles:** Catagorical statistics of demographic, psychographic and behavioristic values of visitors.

**Marketing Strategies:** Goals, objectives, philosophy, framework made to reach targeted markets of a product/service.

**Product Life Cycle:** The span which a product/service evolves through the stages of entry into market, growth, stagnation/maturation, and decline.

**Psychographics:** Characteristics that psychologically drive the wants of buyers.
<table>
<thead>
<tr>
<th><strong>Demographics:</strong></th>
<th>Easily identifiable or quantifiable characteristics such as age, income, sex, marital status, employment.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Behavioristic:</strong></td>
<td>Characteristics that represent patterns of buyers.</td>
</tr>
<tr>
<td><strong>Marketing Segments:</strong></td>
<td>A portion of an entire market that has similar demographic, psychographic, or behavioristic characteristics.</td>
</tr>
<tr>
<td><strong>Scuba:</strong></td>
<td>Self-Contained Underwater Breathing Apparatus.</td>
</tr>
<tr>
<td><strong>Diver:</strong></td>
<td>A person who is certified by a recognized agency to use scuba equipment and partake in scuba excursions.</td>
</tr>
<tr>
<td><strong>Infrastructure:</strong></td>
<td>Natural and/or basic necessities needed to handle an influx of visitors.</td>
</tr>
<tr>
<td><strong>Superstructure:</strong></td>
<td>Buildings and/or erections man-made to accommodate or enhance visitor experience.</td>
</tr>
</tbody>
</table>
Discretionary Income: Monies that are not allocated to essentials.

Economic Impact: The degree of effect the influx of tourism dollars have on a destination.

Wall: A vertical drop in the reef creating the affect of a 'wall' in the ocean.

VARIABLES

The independent variable is the marketing strategies implemented. Current marketing strategies will be attracting certain clientele. The result may show a high geographic origination, for example. This could skew the profile to some degree.

The dependent variable will be the resulting visitor profiles.

Intervening variable is the ability of destination and/or attractions to draw visitors to the island. Certain individual
dive facilities marketing efforts may create more "tourismagnatism" than other dive facilities, or even TCB’s marketing creates for the island overall.
CHAPTER II

REVIEW OF LITERATURE

The literature reviewed included, but not limited to, secondary research pertinent to Bonaire’s overall tourism, and correlations to the study. Secondary research includes study results conducted by the Caribbean Tourism Organization (herein called CTO), and TCB.

The secondary research in the literature review was utilized to align the instrument to correlate questions for comparative analysis. These similar studies were researched to investigate their methodologies, problems, research, and outcome.

These were the primary sources for comparison of arrivals by country and/or continent. Though these are not scuba diving arrivals, they will show the total arrivals by country.

The visitor questionnaire implemented by TCB was utilized extensively in aligning the research instrument. This was requested by Diana Gever, Marketing Director for TCB. By aligning the surveys, correlations can be compared and contrasted.
The "Diver" surveys that were researched were again utilized to align the instrument so that correlations could be derived. The surveys intrinsic to the dive market niche further enhance the instrument devised for this study.

Diver survey analysis include:

Skin Diver Magazine
1.1 million readership, 108 countries

Underwater USA
350,000 readership, Nationally

Professional Association of Diving Instructors (PADI)

Dive Equipment Manufacturers Association (DEMA)

These organizations are prominent authorities on the scuba diving market niche, with national and global networks. Diver profiles and their trend analysis was of great significance to this study.
The secondary research found that the diver profile to be:

1) 40 years of age
2) married
3) household income of $60,000 plus
4) travels twice per year to participate in scuba diving
5) college educated
6) professional occupation

These results closely conform to the findings in the study. Discretionary income is a key factor in both primary and secondary research.

Other literature researched include manuscripts published in Tourism publications, including:

The Cornell H.R.A. Quarterly
Journal of Travel Research
Annals of Tourism Research
Journal of Leisure Research
Tourism Management
The Meaning of Marketing in Travel and Tourism
The New York Times
Books intrinsic to tourism were studied for their perspective on research, marketing, design, development, and analysis. Prominent authors in the field of Tourism as well as Recreation are included for their expertise in research and marketing.

Market Segmentation (Burke and Resnick), or niche, is crucial to this study, as the scuba vacationers have motivations, expectations and needs that are entirely intrinsic to the sport. The study utilized the methods of segmenting travel markets: 1) Demographic 2) Geographic 3) Psychographic, and 4) Behavioristic. The geographic segmenting was especially critical to the study as it focused on the United States versus the European markets.

The assessment of strengths and weaknesses (Burke and Resnick) as perceived by the consumer is paramount to positioning Bonaire, especially in conjunction with a competitive analysis.

One item of particular interest to the study is the use of NONDIRECTED INFORMATION (Gunn), which has been shown to be one of the most important sources of information. Katz and Lazafeld (1955) showed that "person-to-person communication remains the most influential means of transferring information."
This was substantiated in this study, and should be of high concern when devising the marketing plan.

The concern of marketing a tourist destination is prevalent when considering it an "intangible" (Levitt). Perishability and seasonality make proper research critical.

Recreational related material was utilized, as the study was performed on recreational-based tourism. The scuba diving vacationer has been shown to travel to specific destinations for the primary purpose of scuba diving, as a skier would travel to Vail or Aspen for the sole purpose of excellent ski conditions.

Recreational Tourism is becoming a huge market, including but not limited to: skiing; scuba diving; golf; rafting; windsurfing; etc. This can be verified by the number of Tour Operators and Travel Agents which are now specializing in recreational travel. Destinations are promoting and positioning themselves for their quality and uniqueness of natural resources conducive for the correlated sport.

Gunn (1988), talks of recreational tourism. The problem in developing countries is that "In many countries, however, the word
does not even exist." The discipline of recreation needs to be addressed as part of the tourism market mix, a very viable niche.

The recreational experience is a prominent factor in visitor satisfaction (Hunt). The perception of Bonaire by its visitors is crucial when considering return clientele is extremely high as well as nondirected information (word of mouth).

A multi-dimensional scaling (Goodrich) is utilized for image analysis. This gives a multi-faceted overview of the perceived image by the scuba vacationers.

With these understandings of the recreation-based traveler in mind, it can further enhance the study.
CHAPTER III

METHODOLOGY

Bonaire has never implemented any surveys to delineate the scuba vacation market segment from overall arrivals. Therefore, in designing the instrument, we utilized questions closely related to TCB's visitor arrival survey, as well as the scuba industry organizations surveys. There are questions that are intrinsic to the dive market only, however. These questions will further enhance the ability to align a marketing strategy with the scuba vacationers' ideals and perceptions.

Historical data of total arrivals combined with the primary research information of strictly diver profiles will be utilized in analyzing the problem.

This data will identify who the scuba vacationer is, and the geographics of their marketing mix. The scuba vacation profile will be made to determine the demographic, psychographic, geographic, and behavioristic patterns of their current visitors.

A draft was presented to members of CURO for definition and clarity, and gain valuable input the members provided. Active
participation in instrument design was deemed paramount to insure a high participation of instrument implementation. This total effort by all members of CURO will also prove imperative in gaining the truest scuba visitor profile. If some dive facilities declined active involvement, bias may appear as some facilities may cater to certain nationalities more heavily. Some questions were refined or added, with cognitive correlation to the scope of the study.

One section of the survey was asked to be added by TCB, CURO and the Bonaire Marine Park. Bonaire has a mandatory $10 USD charge for a one year permit to dive. This is because the area is declared a Marine Park, with funds used in installing, maintaining, and rotating moorings.

Moorings are permanently installed line for boats to tether to, utilized to prevent dive boats, as well as any other boats, from dropping anchor on the reefs. Reefs are made up of delicate hard and soft corals, and abrasions may stunt growth or even kill a reef. Because the ecosystem of the reefs and marine life are extremely sensitive, moorings are the proper way to insure against damage to reefs by boat anchors.
The Bonaire Marine Park also attempts to assess the Carrying Capacity of the reefs. This refers to the maximum number of divers a reef can adequately handle in a given time period without destruction to the infrastructure (reefs and marine life). When the Marine Park officials believe that the carrying capacity is being maximized, the mooring line is detached and moved to another mooring site.

All were concerned with the perceived effectiveness of the Marine Park by the scuba vacationers, and its correlated fee.

Implementation of the instrument was through the scuba diving facilities (all members of CURO). To insure a high response rate, the survey was handed to the dive vacationers at the time they 'checked-in' to the dive facility. Divers are required to show proof that they have completed a scuba certification course by means of presenting a certification card (or "C-Card") prior to being allowed to rent equipment or board a dive boat. At this time, they were handed the instrument.

Closed-ended questions were utilized to be able to transpose responses into quantitative form for statistical analysis through the use of the SPSS-X computer program. A lickert-scale was used
in response to comparative analysis.

The instrument was also designed to be able to utilize a cross-tabulation of specific results for comparative analysis, i.e., the average vacation time of Americans versus Europeans. This type of derivative information is necessary to accurately compare the behavioristic patterns and economic impact of these market segments.

SCOPE

The scope of the study is limited completely to the scuba vacationer to Bonaire. The instrument was designed in conjunction with TCB, members of CURO, and the Bonaire Marine Park. The survey was implemented by the members of CURO, which interface only with scuba divers. It concentrates solely on the scuba vacation market niche, with which there is the perceived decline in tourism arrivals from the United States market segment.
INSTRUMENT

The instrument (figure 1.1 and 1.2) was designed to be as non-biased as possible, listing response variables alphabetically or chronologically. Demographic information questions were placed first, to derive age, income, education, etc.

The instrument was designed to delineate the geographic origination of the scuba vacationer by Continent, with further delineation between state/country of origin for both the United States market and European market, as this is the focal point of the study.

Psychographic and behavioristic questions were included to be sensitive to the motivations, needs, and expectations that may be intrinsic to the scuba vacationer.

Pertinent information on their diving background was important to see if the market was mostly neophytes or experienced in their diving abilities, what level of certification they currently hold and would like to obtain, and types of diving they look for in a destination (wreck, shore, wall, etc.).
**TABLE 1.1**  
BONAIRE DIVE VISITOR SURVEY

1. Age
2. Sex
3. Country:
   - A. Africa
   - B. Asia
   - C. Canada
   - D. Europe
   - E. Mexico
   - F. South America
   - G. United States
4. If you are a citizen of the United States, what is your two-letter state code?
5. If you are from Europe, which country?
   - A. England
   - B. France
   - C. Spain
   - D. Norway
   - E. Holland
   - F. Germany
   - G. Denmark
   - H. Switzerland
   - I. Austria
   - J. Sweden
   - K. Italy
   - L. Belgium
   - M. Portugal
6A. Marital Status:
   - A. Single
   - B. Married
   - C. Separated/Divorced
6B. Number of immediate family members who dive while on vacation:
6C. Total # of divers in family:
7. Who are you traveling with?
   - A. Alone
   - B. Spouse/companion
   - C. Dive group
   - D. Friends
   - E. Family
8. Occupation:
   - A. Professional
   - B. Executive/Manager
   - C. Administrator
   - D. Blue Collar/Technician
   - E. Student
   - F. Retired
   - G. Scuba Instructor
   - H. Spouse
   - I. Other
9. Education:
   - A. High School
   - B. Some College
   - C. College Graduate
   - D. Advance Degree
10. Household Income:
    - A. less than $20,000
    - B. 20-29,999
    - C. 30-39,999
    - D. 40-49,999
    - E. 50-59,999
    - F. 60-69,999
    - G. 70-79,999
    - H. 80-89,999
    - I. 90-99,999
    - J. 100,000+
11. Interests:
    - A. Aerobics
    - B. Biking
    - C. Bird Watching
    - D. Boating
    - E. Camping
    - F. Cultural
    - G. Dancing
    - H. Dinner Cruises
    - I. Fishing
    - J. Gambling
12. Where else have you traveled for dive vacations?
    - A. Antigua
    - B. Aruba
    - C. Australia
    - D. Bahamas
    - E. Barbados
    - F. Bay Islands
    - G. Belize
    - H. Cancun
    - I. Cayman Islands
    - J. Coco Islands
    - K. Cozumel
    - L. Curacao
    - M. Galapagos
    - N. Jamaica
    - O. Hawaii
    - P. Maldives
    - Q. Palau
    - R. Red Sea
    - S. Truk Lagoon
    - T. Turks & Caicos
    - U. US Virgin Is.
    - V. Other
13. Number of vacations per year:
    - A. 1
    - B. 2
    - C. 3
    - D. 4
    - E. 5
    - F. More than 5
14. Length (on average/# days) of visits:
    - A. 3
    - B. 5
    - C. 7
    - D. 9
    - E. 11
    - F. More than 14
15. Is this your first time visiting Bonaire?
    - A. Yes
    - B. No
16. Number of previous visits to Bonaire:
    - A. 1
    - B. 2
    - C. 3
    - D. 4
    - E. 5
    - F. More than 5
17. How did you first learn of Bonaire?
    - A. Dive Club
    - B. Dive Shop
    - C. Friend/Relative
    - D. Magazine
    - E. Newspaper Ad
    - F. Travel Agent
    - G. Travel Guide/Book
    - H. TV/Radio
TABLE 1.2

18. Diving Experience:
   A. Years Diving  B. # of logged dives:
   A. 1-3  ____  ____
   B. 3-5  ____  ____
   C. 5-7  ____  ____
   D. 7-9  ____  ____
   E. 9 or more  ____  ____

19. Certifying Agency:
   A. CMAS  ____  ____
   B. IDEA  ____  ____
   C. MDEA  ____  ____
   D. NASDS  ____  ____
   E. NAUI  ____  ____
   F. PADI  ____  ____
   G. PDIC  ____  ____
   H. SSI  ____  ____
   I. YMCA  ____  ____

20. Level of certification:
   A. Open Water  ____  ____
   B. Advanced Open  ____  ____
   C. Any Specialties  ____  ____
   D. Divemaster  ____  ____
   E. Asst. Instructor  ____  ____
   F. Instructor  ____  ____
   G. Other  ____  ____

21. Certifications you plan to obtain:
   A. Open Water  ____  ____
   B. Advanced Open  ____  ____
   C. Specialties:
      1. Deep Diver  ____  ____
      2. Night Diver  ____  ____
      3. Rescue Diver  ____  ____
      4. Wreck Diver  ____  ____
      5. U/W Photographer  ____  ____
      6. Cave Diver  ____  ____
      7. Search&Recovey  ____  ____
      8. Ecology  ____  ____
   D. Divemaster  ____  ____
   E. Asst. Instructor  ____  ____
   F. Instructor  ____  ____
   G. Other  ____  ____

22. Important criteria for choosing a dive destination:
   A. Image of Destination  ____  ____
   B. Hotel Accomodations  ____  ____
   C. Lowest Price  ____  ____
   D. Night Life  ____  ____
   E. Quality of Diving:
      1. Water Clarity  ____  ____
      2. Marine Life  ____  ____
      3. Reefs  ____  ____
      4. Walls  ____  ____
      5. Wrecks  ____  ____
      6. Shore Diving  ____  ____
      7. U/W Photography  ____  ____
      8. Marine Park  ____  ____
   F. Dive Facilities  ____  ____
   G. Other  ____  ____

23. What magazines do you subscribe to?
   A. Dive Training  ____  ____
   B. Scuba Diving  ____  ____
   C. Skin Diver  ____  ____
   D. Undercurrent  ____  ____
   E. Underwater USA  ____  ____

24. Compared to other destinations, how do you rate Bonaire?

   A. Accommodations 5 4 3 2 1
   B. Air / Connections 5 4 3 2 1
   C. Diving 5 4 3 2 1
      1. Water Clarity 5 4 3 2 1
      2. Marine Life 5 4 3 2 1
      3. Reefs 5 4 3 2 1
      4. Walls 5 4 3 2 1
      5. Wrecks 5 4 3 2 1
      6. Shore Dives 5 4 3 2 1
      7. U/W Photography 5 4 3 2 1
      8. Dive Facilities 5 4 3 2 1
      9. Marine Park 5 4 3 2 1
      10. Warm Water 5 4 3 2 1
   D. Price 5 4 3 2 1
   E. Restaurants 5 4 3 2 1
   F. Local Hospitality 5 4 3 2 1
   G. Service 5 4 3 2 1

25. Please rate the cost VS your perceived effectiveness of the marine park:

   Effective Ineffective
   5 4 3 2 1

26. Average dollar amount spent on dive vacation (1 week basis):
   A. Less than $900  ____
   B. $900-$1499  ____
   C. $1500-$1799  ____
   D. $1800-$2099  ____
   E. $2100-$2399  ____
   F. $2400 +  ____

27. What is your overall Opinion of Bonaire?
   A. Excellent  ____
   B. Good  ____
   C. Average  ____
   D. Poor  ____
   E. Very Poor  ____

28. Would you return to Bonaire?
   A. Yes  ____
   B. No  ____

   B. Why?
   A. Hospitality  ____
   B. Accommodations  ____
   C. Service  ____
   D. Restaurants  ____
   E. Shopping  ____
   F. Diving:
      1. Shore Diving  ____
      2. Dive Facilities  ____
      3. Warm Water  ____
      4. Walls  ____
      5. Wrecks  ____
      6. Reefs  ____
      7. Water Clarity  ____
      8. Marine Park  ____

29
LIMITATIONS

Limitations of this study will be: 1) seasonality of the survey 2) statistical data provided by TCB & CTO, 3) correlation of secondary research to the primary research, 4) no trend analysis.

Research will be conducted to investigate that the instruments used in obtaining the data were unbiased and that the sampling is representative of the population.

I. SEASONALITY OF THE SURVEY

The instrument was implemented for a two week duration in October of 1991. All participating members of CURO adhered to this window. Results of the survey, therefore, are intrinsic to this time frame. Some strong correlations may be relevent, but we will assume that the derived statistics may only be completely accurate for this time frame.

To properly depict an overall dive visitor profile, implementation of the instrument should be utilized at intervals throughout the year (suggest a quarterly time period implementation). This would give a true profile on a yearly
II. STATISTICAL ANALYSIS OF TCB & CTO

The secondary research of visitor arrivals came primarily from TCB and CTO. The survey was designed to align with many questions utilized in the instrument implemented by these organizations. This was done to give a strong relevance in findings.

III. CORRELATION OF SECONDARY RESEARCH TO PRIMARY RESEARCH

The primary question in relating primary research to the secondary research is: are the motivations of the "total arrivals" the same as the "scuba diving vacationer"?

What is also inferred by the study is that the percentage of scuba diving vacationers versus total arrivals is constant. Therefore, if we assume that 51% of the United States arrivals are divers, then 51% of the European arrivals are also divers.

There is no statistical evidence found to show what percentage of arrivals are divers, overall or segmented by
country.

IV. NO TREND ANALYSIS

This study was this first of its type on the island of Bonaire. Research was needed to delineate the dive market segment from total arrivals, to better understand the perceptions and expectations of the traveling scuba diver. The study will reveal geographic areas which are prominent exporters of scuba vacationers, to where Bonaire can better concrete their marketing efforts.

As a first time study, this will develop a profile of the scuba vacationer in the time period in which it was implemented. The drawback of its uniqueness is that Bonaire will not benefit from any trend analysis. The study will try to correlate relevent studies in which trend analysisi can be derived.

IMPLEMENTATION

The instrument was implemented at each dive facility. The scuba vacationer must 'check-in' with the dive facility upon
arriving to present their certification, or 'c-card', to prove they have successfully completed an Open Water Scuba Certification Course. This certification is to insure the diver is safe and knowledgeable of scuba equipment, usage, and diving physiology. The requirement to present certification offers the opportune time to present the instrument - it will only be administered to divers, and will insure a high response rate.

When the diver presents their c-card, the instrument was handed out, asking they return it when they pay their final bill at the end of their stay.

TIME FRAME

The study was conducted for a two week time period from October 5 through October 19, 1991.
CHAPTER IV
RESULTS / ANALYSIS

SURVEY RESPONSE RATE

The instrument was implemented during the time period of October 5 through October 19, 1991. During that window, 121 instruments were handed out, with 92 responses, for a response rate of 76.03%. Five of the seven dive facilities that are members of CURO elicited responses for the study.

Results of the survey showed the primary traits of Bonaire’s diving visitor to be:

- Married Male
- traveling with spouse/companion
- professional
- college degree
- household income of $90,000
- primary interest is scuba diving
- length of stay is 7 days
- fifth or more visit to Bonaire
- subscribes to "Skin Diver Magazine"
- takes two vacations per year
- heard about Bonaire from a friend or relative
- has been scuba diving for 1-3 years (figure 2)
- holds their Open Water scuba certification (figure 3)
- United States citizen.

The following are the dominant results of the study:

SEX:  
- male - 59.3%
- female - 40.7%

MARITAL STATUS:  
- Married - 69.9% (figure 4)
- Single - 25.3%

TRAVELING WITH:  
- Spouse/companion - 56.6%
- Family - 14.5%
- Friends - 13.2%
- Dive group - 9.2%
- Alone - 6.6%

OCCUPATION:  
- Professional - 38.6%
FIGURE 4

(69.9%) Married

(4.8%) Sep. or Div.

(25.3%) Single
Executive/manager - 18.1%
Other - 14.5%
Blue collar/technical - 9.6%
Student - 4.8%
Administrator - 3.6%
Retired - 3.6%
Scuba instructor - 3.6%
Spouse - 3.6%

EDUCATION:

(figure 5)
College degree - 30.1%
Some college - 28.9%
Advanced degree - 26.5%
High school - 14.5%

INCOME:

$90,000 plus - 41.1%
$60-69,000 - 16.4%

(majority of market earn $60,000 or more)

PRIMARY INTERESTS:

(table 1)
Scuba diving - 91.8%
### TABLE 1

**VAR11S** 'scuba diving'

<table>
<thead>
<tr>
<th>Value Label</th>
<th>Value</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cum Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>1</td>
<td>78</td>
<td>90.7</td>
<td>91.8</td>
<td>91.8</td>
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<tr>
<td>'no'</td>
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<td>7</td>
<td>8.1</td>
<td>8.2</td>
<td>100.0</td>
</tr>
<tr>
<td>.</td>
<td>1</td>
<td>1.2</td>
<td>Missing</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 86

Mean: 1.082
Mode: 1.000
Kurtosis: 7.751
S E Kurt: .517
Skewness: .572
S E Skew: .261
Maximum: 2.000
Range: 1.000
Minimum: 1.000
Sum: 116.000

Valid cases: 85
Missing cases: 1

### TABLE 2

**VAR 11V** 'snorkeling'

<table>
<thead>
<tr>
<th>Value Label</th>
<th>Value</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cum Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>1</td>
<td>54</td>
<td>62.8</td>
<td>63.5</td>
<td>63.5</td>
</tr>
<tr>
<td>'no'</td>
<td>2</td>
<td>31</td>
<td>36.0</td>
<td>36.5</td>
<td>100.0</td>
</tr>
<tr>
<td>.</td>
<td>1</td>
<td>1.2</td>
<td>Missing</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 86

Mean: 1.365
Mode: 1.000
Kurtosis: -1.713
S E Kurt: .517
Skewness: .572
S E Skew: .261
Maximum: 2.000
Range: 1.000
Minimum: 1.000
Sum: 116.000

Valid cases: 85
Missing cases: 1
Snorkeling - 63.5% (table 2)
all other interests listed rated less than 29%

LENGTH OF STAY: (figure 6)
7 days - 51.2%
14 days - 18.6%
9 days - 11.6%
more than 14 days - 9.3%
5 days - 4.7%
11 days - 3.5%
3 days - 1.2%

FIRST VISIT TO BONAIRE:
yes - 48.2%
no - 51.8%

COUNTRY OF ORIGIN: (table 3)
United States - 68.2%
Europe - 22.1%
Canada - 4.7%
### TABLE 3

**VAR03** country of origin

<table>
<thead>
<tr>
<th>Value Label</th>
<th>Value</th>
<th>Frequency</th>
<th>Percent</th>
<th>Percent</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
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<td>Canada</td>
<td>3</td>
<td>4</td>
<td>4.7</td>
<td>4.7</td>
<td>4.7</td>
</tr>
<tr>
<td>Europe</td>
<td>4</td>
<td>19</td>
<td>22.1</td>
<td>22.4</td>
<td>27.1</td>
</tr>
<tr>
<td>So America</td>
<td>6</td>
<td>4</td>
<td>4.7</td>
<td>4.7</td>
<td>31.8</td>
</tr>
<tr>
<td>United States</td>
<td>7</td>
<td>58</td>
<td>67.4</td>
<td>68.2</td>
<td>100.0</td>
</tr>
<tr>
<td></td>
<td>.</td>
<td>1</td>
<td>1.2</td>
<td>Missing</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Mean                 | 6.094 | Std err | 0.154   | Median  | 7.000   |
| Mode                 | 7.000 | Std dev | 1.419   | Variance| 2.015   |
| Kurtosis             | -0.682| S E Kurt| 0.517   | Skewness| -1.065  |
| S E Skew             | 0.261 | Range   | 4.000   | Minimum | 3.000   |
| Maximum              | 7.000 | Sum     | 518.000 |         |         |

Valid cases 85  
Missing cases 1
South America - 4.7%

TOP SIX STATES IN U.S.:  
(figure 7)

New York - 30.4%
New Jersey - 12.5%
Illinois - 12.5%
Connecticut - 8.9%
Pennsylvania - 5.4%
California - 5.4%

TOP FIVE EUROPEAN COUNTRIES:  
(figure 8)

Germany - 31.6%
Holland - 31.6%
Switzerland - 21.1%
Belgium - 10.5%
England - 5.3%

INTERPOLATION OF RESEARCH

One primary statistic is the country of origin. The United States accounted for 68.2% of all scuba vacationers, while Europe accounted for 22.1%. If we correlate this to the overall arrival
US Arrivals by State

ME
CT
IL
NJ
NY

FIGURE 7
Europe Arrivals by Country

England
Belgium
Switz
Holland
Germany
percentages from 1990 to 1992 (table 4), we see that Europe accounts for over 50% of total yearly arrivals, with the United States accounting for less than 45%.

Table four also depicts a trend analysis over the three year period for both Europe and United States. Europe shows a growth trend each year, with majority share of travelers in 1992 at 57.6%. Contrasting the United States during the same duration shows a steady decline in visitor arrivals. This supports the hypothesis of declining United States visitors with inversely proportional growth in the European market.

The Caribbean Tourism Organization also graphically depicts a sharp increase in European arrivals from 1986 to 1990 (figure 9), with over 90% increase in total arrivals in the four year span. Contrasted with total arrivals from the United States during the same time span, the United States arrivals only grew approximately 30%. This again supports the hypothesis of an increasing European contingency, however we do need to consider it is total arrivals.

This conflict of the scuba vacation market may be accounted for by the following:
TABLE 4

PERCENTAGE OF TOTAL ARRIVALS

(statistics from Tourism Corporation Bonaire's visitor surveys)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>1990</th>
<th>1991</th>
<th>1992</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>46.5%</td>
<td>53.2%</td>
<td>57.6%</td>
</tr>
<tr>
<td>United States</td>
<td>47.9%</td>
<td>42.0%</td>
<td>37.1%</td>
</tr>
</tbody>
</table>
1) Length of Stay:

When statistics were cross-tabulated, it showed that the majority of United States scuba vacationers, 60.3%, stayed on Bonaire for seven days (table 5). When contrasted to the cross-tabulation of the European scuba vacationer, 78.9% stayed on Bonaire for a length of 14 or more days.

The study was implemented for a duration of two weeks. The higher percentage of United States scuba vacationers could be accounted for by the fact that there was more 'turn-over' due to the 7 day duration of stay. This assumes that the percentage of arrivals which are scuba diving vacationers is constant in both the United States and European market.

On the whole, the majority of respondents vacationed twice per year (table 6, figure 10).

2) Percentage of Scuba Divers to Total Arrivals

There is no evidence of the percentage of total arrivals which are certified divers. This variable could change between countries, as well. The study will assume, due to lack of support of these statistics, that this percentage of overall visitors is constant.
### TABLE 5

**LENGTH OF STAY**  
*(days)*

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>3</th>
<th>5</th>
<th>7</th>
<th>9</th>
<th>11</th>
<th>14</th>
<th>14+</th>
</tr>
</thead>
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</tr>
<tr>
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<td></td>
</tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>South America</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>5.3%</td>
<td>10.5%</td>
<td>9.3%</td>
<td></td>
<td></td>
<td></td>
<td>42.1%</td>
</tr>
<tr>
<td></td>
<td>1.7%</td>
<td>5.2%</td>
<td>60.3%</td>
<td>13.8%</td>
<td>5.2%</td>
<td>13.8%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>50.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>25.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100.0%</td>
</tr>
</tbody>
</table>

### TABLE 6

**VACATIONS PER YEAR**

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>5+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
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<td>United States</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Canada</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>South America</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>15.8%</td>
<td>42.1%</td>
<td>21.1%</td>
<td>10.5%</td>
<td>5.3%</td>
<td>5.3%</td>
</tr>
<tr>
<td></td>
<td>26.3%</td>
<td>29.8%</td>
<td>28.1%</td>
<td>12.3%</td>
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<td>3.5%</td>
</tr>
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<td>50.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>25.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FIGURE 10

# of Vacations Per Year

### Graph Details

- **Y-axis:** Number of Vacations Per Year
- **X-axis:** Range from 0 to 40
- **Legend:**
  - 1
  - 2
  - 3
  - 4

### Observations
- The graph shows the distribution of vacations per year.
- Each category (1, 2, 3, 4) represents a different number of vacations per year.
- The graph visually represents the frequency of vacations taken by individuals in the study.
IMPORTANT CRITERIA OF A DESTINATION

The results of the study revealed what the scuba market niche holds as important criteria of a destination (figure 11). Scuba divers are more concerned with the natural infrastructure that is the basis of their recreation — the waters surrounding an island.

The following is a list delineating the important factors a scuba vacationer considers in choosing a destination:

- Marine Life  81.2%
- Water Clarity  78.8%
- Reefs  77.7%
- Dive Facilities  48.2%
- Shore Diving  43.5%
- Hotel Accomodations  41.2%
- Walls  37.6%
- Image  34.1%

Other factors gave a response rate of less than 30%.

The important information derived from this portion is the motivating factors for a scuba vacationer to travel to. The top five factors are indigenous to scuba diving: Marine Life; Water
Clarity; Reefs; Dive Facilities; shore diving.

These Factors are of utmost importance in marketing Bonaire. The Marine Park protects the marine life, so there is an abundance and diversity to promote. Bonaire enjoys 100' plus visibility, another major component in deciding a scuba destination. Reefs are not only abundant, but protected by the Bonaire Marine Park. Dive facilities are professional and plentiful, but this is more a generic factor as most competitive destinations also have the same.

Shore diving is the most prominent factor for product differentiation. Bonaire enjoys abundant shore diving along the lee side of the island. Dive sites are all marked by moorings because of the Marine Park, but most are easily accessible from shore. They are also easily identifiable when driving along the road: large rocks are painted yellow, with the name of the dive site painted in black. An arrow points offshore to the mooring of the dive site. In looking at the Competitive Analysis chart (figure 12), the Cayman Islands and U.S. Virgin Islands are the two major competitors. These islands do not have shore diving developed in the manner Bonaire has, largely due to the distance from shore. As mentioned in the recommendations section, this factor should be prominent in marketing Bonaire.
Competative Analysis

Other
US VI
Caymans

FIGURE 12
Hotel accommodations is the first factor depicted to be of concern outside of the natural infrastructure. Image was the next non-diving major factor.

Lowest price (14.1%) was not a major factor, showing that the scuba market has more discretionary income. This is verified by the household income of $60,000 per year being more than 70% of respondents (figure 13).

SOURCE

Figure 14 depicts the source of which the respondents heard about Bonaire. The majority of scuba divers (32.9%) relyed on their frineds or relatives for their travel advice. Dive clubs (19.0), magazines (17.7%), and dive shops (15.2%) are all close in being a decisive factor in traveling, with travel agents (10.1%) lagging behind.

OPINION OF BONAIRE

The vast majority of scuba diving respondents rated Bonaire as excellent (55.8%), another major portion rated it as good
FIGURE 13

Source

(32.9%) Friend/Relative
(19.0%) Dive club
(17.7%) Magazine
(15.2%) Dive shop
(2.5%) Travel Guide
(2.5%) Newspaper Ad
(10.1%) Travel Agent
(40.3%), with only a small contingency rating it as average (3.9%). None rated Bonaire poor or very poor (figure 14).

Of these respondents, 98.7% stated they would return to Bonaire, with only 1.3% saying they would not (figure 15). This accounts for the high percentage of repeat scuba vacationers to Bonaire (figure 16).

**EFFECTIVENESS OF MARINE PARK**

The majority of scuba divers perceived the Marine Park as being somewhat ineffective (54.4%). This does not correlate to the abundance of marine life and reefs which rated high in figure 17.

**ARRIVALS BY STATE (UNITED STATES CITIZENS)**

Though concerned with United States arrivals versus European, the study further delineated the states the respondents were from (figure 7). This will prove valuable in the resulting marketing strategies.
FIGURE 15

Would You Return?

(98.7%) Yes

(1.3%) No
New York showed the highest contingency, comprising over 30% of the United States scuba diving arrivals. New Jersey accounted for 12.5%, Illinois with 12.5%, and Connecticut with 8.9%.

EUROPEAN ARRIVALS BY COUNTRY

The study broke down the European arrivals by country to show which countries are prominent markets (figure 8). This information will prove valuable for TCB’s marketing strategies.

Germany and Holland contributed 31.6% each, with Switzerland comprising 21.1% of the European market. Belgium accounted for 10.5%, with England allotting 5.2%.
FIGURE 17

Effectiveness of Marine Park

Somewhat Effective
No Difference
Ineffective
Somewhat Ineffective
CHAPTER V

RECOMMENDATIONS

After reviewing the study, the primary recommendations are as follows:

I. QUARTERLY IMPLEMENTATION OF SURVEY

This will provide ongoing primary research to analyze trends in the tourism patterns of the scuba market. As with any quality marketing plan, continual research is paramount. The resulting statistical analysis will offer trend analysis in projecting demand from different market segments. This is paramount in developing focused marketing strategies.

The statistics derived from this study must be viewed in the seasonality in which it was implemented. The results are tangible only to the time period in which it was instituted.

The research is essential in to marketing, as noted by Dr. Gee (Cornell H.R.A. Quarterly): "any community needs an overall database showing trends on occupancy rates, length of stay, origin of traffic or visitor market, spending habits, method of transportaion to the destination, and the popularity of specific
attractions or events".

The need for continual research to properly align product with consumers’ wants is paramount in Tourism development (Tourism USA).

II. WEEK LONG DURATION OF CONTINUING STUDIES

To realize a truer picture of the scuba vacationer, the study should be conducted in one week increments. As shown by both primary and secondary research, the Europeans are staying for longer durations (14 days or more). This will skew the study by having a higher response from the United States market, whose typical vacation is seven days.

III. DEVISE MARKETING STRATEGY FROM STUDY ANALYSIS

The qualities that the sample represented found unique should be prominently promoted in the marketing strategies. The following are the ideals people found in Bonaire, with over 40% of respondents favoring:

water clarity - 78.8%
marine life - 81.2%
reefs - 77.6%
shore diving - 43.5%
dive facilities - 48.2%

This follows the idea that "the relationship between a traveller's buying process and a destination image" (Gunn). The image of a destination was important for the scuba vacationer and should be considered in marketing (Chon). The importance of image is again reinforced through additional research (Hunt).

Recreational Tourism, i.e. the scuba vacation market, is important to Bonaire's economy. Thus, the perception of it must be elevated to enhance its' appeal (Mercer).

The inventory analysis (see figure 3) shows that Bonaire's natural resources are highly respected. This strength should be highly visible in the marketing strategies (Burke and Resnick).

Publications that should be targeted are those that the responants showed high rate of readership (figure 18):

Skin Diver Magazine - 44.7%
Scuba Diving - 37.6%
Underwater USA - 14.1%
Dive Training - 12.9%
Undercurrent - 10.6%

Skin Diver has a readership of 1.1 million, circulation of 400,000 and is distributed in 108 countries worldwide. Average income of Skin Diver Magazine readers is $70,000. This should be the prime advertising outlet due to its' global distribution, readership, and high popularity.

A proper marketing strategy will help to "organize, control and deliver their continuous production capacity in equivalent ways" (Specek) to manage demand, especially against seasonality to prevent perishability.

IV. FOCUS ON EUROPEAN GROWTH TREND

With the rising number of European arrivals, marketing should focus on the trend. As the United States arrivals are declining, it is also shown that they travel for shorter durations. Their expenditures also appear to be shrinking (New York Times). As figure 16 depicts, the major contributing countries of Europe are:
1) Germany, 2) Holland, and 3) Switzerland, accounting for over 20% of the European arrivals. Marketing should be focused on sustaining these primary feeder countries.

V. MARKETING REGIONALLY TO UNITED STATES

As figure 15 displays, New York and New Jersey account for over 40% of the United States scuba vacationer arrivals during this time frame. Connecticut and Maine were fourth and fifth in percentage of arrivals. This shows a very strong contingency in the Northeast market.

VI. PROMOTE THE ISLAND'S HIGH SATISFACTION RATE

Opinion of Bonaire by the scuba vacationers is extremely favorable, with the majority showing an 'excellent' rating, and over 40% showing a 'good' rating (figure 14).

The return percentage is even more dramatic, showing that 98.7% of the scuba vacationers would return to Bonaire. This reinforces the high number of return visits to the island (see figure 16) and the high response that would return (figure 15).
CONCLUSION

The secondary research supported the hypothesis that the United States market is declining, and that the European market is growing. This is indigenous to overall arrivals. If percentages of arrivals versus divers are constant, then the perception by TCB and members of CURO are correct.

The primary research indicated a high volume of United States arrivals, although the study reveals that the majority of U.S. scuba vacationers stay only seven days. This shows a greater turn-over in the two week time frame, versus Europeans, which the majority stay two weeks or more. Given this, the European market would indeed be the larger market share.

With the institution of a quarterly study, one week in duration to eliminate 'turn-over', Bonaire will benefit from the resulting trend analysis to properly align their marketing strategies.

Properly focused marketing strategies aligned with the results of this study will enhance TCB and CURO’s efforts in marketing their product. Combined with continuing research, implemented to be sensitive to seasonality vacilations, should
prove extremely beneficial to raising the response and conversion rates of their marketing efforts. This will show up in their return on investment of advertising and marketing dollars.
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