

CRUISE SURVEY 2002



August 2003



*Photographs by:
Louisette J.
Christiaans-
Yarzagaray*

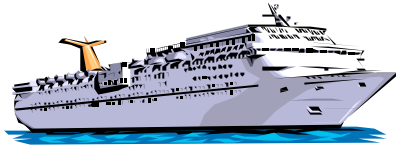
CENTRAL BUREAU OF STATISTICS - ARUBA

Statistics for progress

**Cruise
2002**

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PREFACE

Tourism is the main economic activity on the island for the past decades. There is, without any doubt, need for statistical data in the tourism industry, especially in the cruise tourism industry, to measure the economic benefit that this industry provides. Statistical data is also essential for public policy makers and the private sector that benefits from this industry to better formulate marketing and development plans.

For this reason the Central Bureau of Statistics, after conducting a similar survey in 1997, has chosen to carry out another Cruise Surveys, with the primary reason to measure the tourist expenditures and the satisfaction level of cruise visitors, among other reasons. Marketing policies in the private and public sector are based on survey results and in the National Accounts framework, this data is very important for estimating the direct and the indirect effect of the Tourism Industry in the island's economy.

In this present report you will find the results of the CBS Cruise Survey 2002, executed by the Central Bureau of Statistics. This report contains preliminary results in table format with very little analysis of the figures. Much analysis is not really necessary since the tables are on themselves self explanatory. The report initiates with a section called "Highlights", which contains a brief description and analysis of the main results extracted from the survey.

The realization of the "CBS Cruise Survey 2002" would not have been possible without the excellent work and dedication of the interview team and the initiative and the cooperation of the Central Bureau of Statistics Tourism project group, which consists of Louissette Christiaans-Yarzagaray M.Sc. (project leader), Mary Tromp-Geerman (assistant), and Marlene Barendregt-Croes (assistant). This project also would not have been possible thanks to the excellent assistance of the Central Bureau of Statistics automation staff, especially Marjolene van der Biezen-Marques B.A. Their assistance was imperial to this project since, as many other projects within the Central Bureau of Statistics nowadays, all the data depend on a scanning process because the data-entry system has been replaced by a scanning.

The Central Bureau of Statistics hopes that this "CBS Cruise Survey 2002" will provide all the users with valuable and necessary information for the future developments in this industry. Many other information, which is not immediately presented in this publication, could be extracted from the survey and made available for the general public. This information will be extracted on a request basis. Thus, for any other information needed from this survey or for any comments, feedback or further information, feel free to contact the Central Bureau of Statistics.

Drs. R.A. Lee
Director of the Central Bureau of Statistics of Aruba

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1. HIGHLIGHTS

Worldwide tourism has assumed considerable importance especially its role in the economic development. Tourism is one of the main economic activities in Aruba. Therefore, it is necessary to monitor any positive or negative development. For the cruise tourism market this is no different.

The goal of this publication is to give an indication, in the form of statistical data, of the economic benefit that cruise tourism provides. Cruise statistics and tourism statistics in general can help policy-makers in the public and the private sector gain a better view of cruise tourism's overall importance and can help with a better marketing plan for each of the sectors that benefit from this industry.

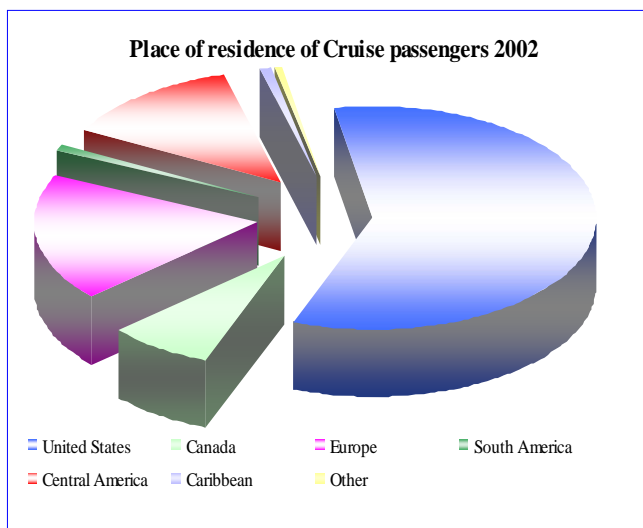
The following gives a general view of the cruise industry in 2002 by means of graphs and analysis of the most important results based on the "CBS Cruise Survey 2002".

Place of residence of the passengers

When looking at the number of cruise visitors for the past ten to twelve years, one can see that this number has quadrupled over the period of 1990 to 2002. In the year 2002, the number of passengers more than doubled compared to the year 1999.

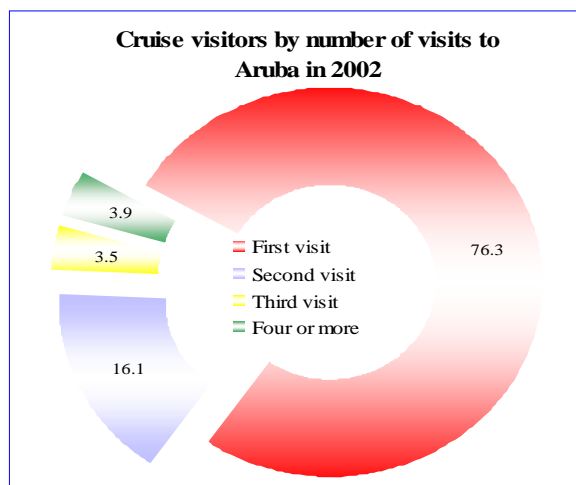
The results of the "CBS Cruise Survey 2002" show that 58.8 percent of the total interviewed cruise visitors were from the United States, 18.8 percent were from Europe and another 13.1 percent were from the Caribbean. Of the remaining interviewed cruise visitors, 7.6 percent were from Canada, while only 0.8 percent came from Central America. The cruise visitors' market from the US decreased with 13.8 percent compared to 1997 while the market from Europe increased with 5.8 percent compared to 1997. The market from the Caribbean region more than doubled. Cruise visitors from Central America decreased considerably compared to 1997. Furthermore, the survey did not register any visitor by cruise from South America.

The passengers from the US were mainly from the states of California, Florida and New York. These were the same three main states of the US as the in 1997 survey, with the only difference that visitors from California increased with a little more than 50 percent. The passengers from Europe were mainly from Germany and Great Britain.



Repeaters

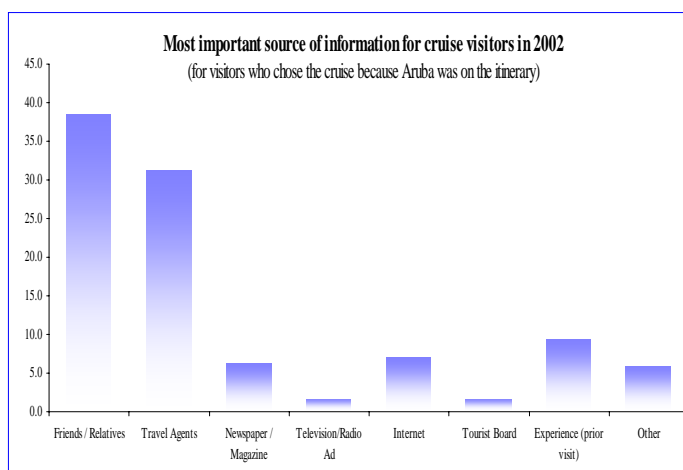
From the interviewed cruise passengers, 79.6 percent came to Aruba for the first time by cruise, while 76.3 percent of the interviewed passengers came to Aruba for the first time. This means that 3.3 percent of these passengers already visited Aruba by air. In 1997, 83.4 percent of all the interviewed passengers visited Aruba for the first time by cruise. Of the interviewed passengers in 2002, 20.4 percent visited Aruba more than once by cruise. If we look at the overall number of visit to Aruba, by cruise and by air, of all the interviewed cruise visitors, 23.5 percent were repeat visitors.



Cruise visitors decision making

All the cruise visitors who were interviewed were asked if the presence of Aruba on the cruise itinerary influenced their decision to take the cruise. They were also asked what was the single most important source of information when making the decision to take this cruise. The results show that 48.4 percent of the cruise visitors took the cruise because Aruba was on the cruise itinerary. Based on the answers received from visitors who took the cruise because Aruba was on the itinerary, it can be concluded friends and relatives and travel agents were the main sources of information used by cruise visitors. On the other hand, television ads, radio ads and tourist boards seem to be the less effective sources of information for the visitors.

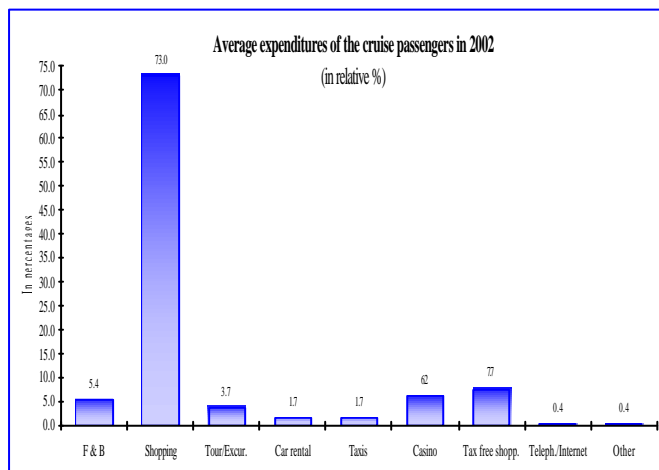
For the remaining cruise visitors, what influenced them the most to take the cruise was the Panama Canal, friends and relatives, the trip itself (pleasure), the Caribbean in general and the prices (package deals) among others.



Expenditures

According to the result of the survey, each interviewed cruise passenger spent an average of US\$112.11 while they were in Aruba. The passengers spent most of their money on shopping. Of the average expenditure, a little more than 80 percent was spent on shopping, of which 73 percent was on shopping and another 7.7 percent was spent on tax free shopping. Besides shopping, little more than 6 percent was spent in casinos, 5.4 percent on food and beverage and another 3.7 percent on tours and excursions.

Compared to 1997, the average expenditure of cruise passengers increased with 75.5 percent. This considerable increase was mainly due to a 175.5 percent increase in expenditures on shopping. When comparing the survey results of 2002 with 1997, it can be concluded that the expenditure pattern of cruise visitors changed radically in 5 years, indicating as though most cruise visitors are targeting more and more on the shopping aspects of the cruise, rather than taking tours and excursions to get to know the island. The average package price paid by the interviewed passengers in 2002 was US\$1,398, which is 4.3 percent lower than in 1997. This is probably due to more and more specials and offers for lower package rates and more promotions for cruise ship packages. The average price of tours and excursions in Aruba sold onboard the cruise ships in 2002 was US\$13.90 while in 1997 this was US\$16.60.



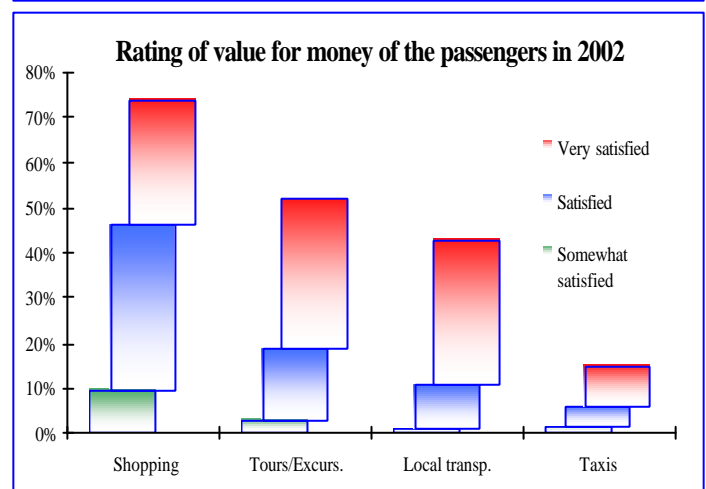
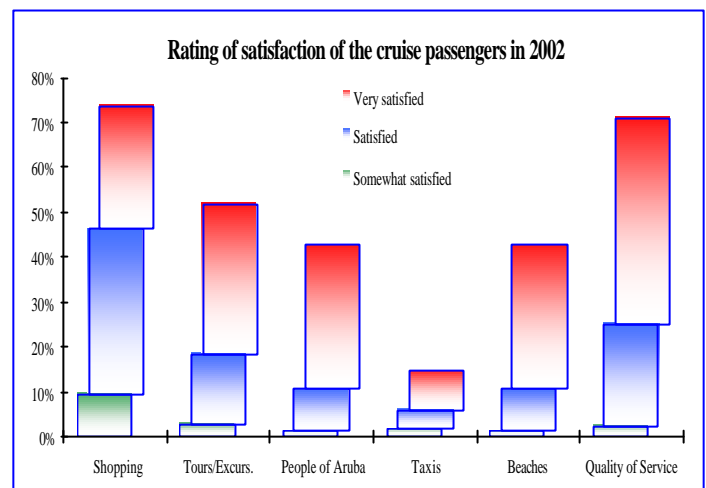
Rating of satisfaction of the cruise visitors

Based on the questions of ratings of value for money and level of satisfaction of goods and services, a relatively high percentage of interviewed cruise passengers answered Unknown in 2002. This was also the case in 1997. This could be attributable to the respondents who did not experience the service, did not buy the good or did not want to answer the question.

The interviewed passengers were relatively satisfied with the value for money paid for the products and services of Aruba. They were primarily satisfied with the tours and excursions they took in Aruba. Shopping, on the other hand, had the highest percentage of dissatisfaction rate. Local transportation, as in the year 1997, was the service less used among the goods and services used by the passengers in 2002.

In general, the interviewed passengers were very satisfied with the quality of service in Aruba. In the year 2002, cruise passengers were particularly satisfied with the people of Aruba, which had a 52.9 percent rating of very satisfied, the

highest rating of all the categories. Cruise passengers were also very satisfied with shopping, while shopping again had the highest rating of dissatisfaction also. The interviewed cruise visitors were relatively very satisfied with the quality of service, the beaches and the tours and excursions in Aruba. Interviewed passengers were also asked what they enjoyed most and what they enjoyed least in Aruba. Cruise passengers enjoyed the sightseeing and the beaches the most. In 2002, of all the interviewed visitors, 14.8 percent answered that they enjoyed everything. What they enjoyed the least was the weather (warm). Remarkable was that a total of 61.9 percent of all the cruise visitors did not have a least enjoyable aspect of Aruba. Compared to the 1997, 68.2 percent of the interviewed cruise passengers answered that they did not have a least enjoyable aspect.



Cruise visitors opinion of next vacation

Cruise passengers were asked based on their experience of this vacation, what they are most likely to do on their next vacation. Of all the interviewed passengers, 43.5 percent think that they will take another cruise and 26.2 percent answered that they would like to visit Aruba for a land based vacation. Another 8.6 percent of the interviewed visitors answered that they will combine a cruise and a land based vacation to Aruba, while another 8.4 percent think that they are going to visit another Caribbean island for a land based vacation. The interviewed visitors were also asked, based on the ports just visited, which port they would like to return to if they were to take another cruise. Almost 37 percent of the visitors answered that they would like to return to Aruba while 45.8 percent of the passengers could not give an answer since Aruba was one of the first ports visited.

2. List of tables

2.1 INTERVIEWED PASSENGERS BY CRUISE SHIP

Name of cruise ship	Absolute	Relative %
Total	1,151	100
Mercury	30	2.6
Dawn Princess	32	2.8
Costa Romantica	87	7.6
Zaandam	27	2.3
Norwegian Sea	29	2.5
Volendam	52	4.5
Crown Princess	30	2.6
Carnival Destiny	181	15.7
Sunbird	28	2.4
Summit	37	3.2
Grandeur of the Seas	37	3.2
Ocean Princess	27	2.3
Adventure of the seas	209	18.2
Sea Princess	34	3.0
Paradise	39	3.4
Infinity	33	2.9
Sun Princess	34	3.0
Rotterdam	46	4.0
Brilliance of the Seas	66	5.7
Royal Princess	23	2.0
Oceana	33	2.9
Crystal Symphony	19	1.7
Breamar	18	1.6

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.2 INTERVIEWED PASSENGERS BY PLACE OF RESIDENCE

Country	Absolute	Relative %
Total	1,151	100
United States	677	58.8
Canada	87	7.6
Europe	216	18.8
Central America	9	0.8
Caribbean	151	13.1
Other	11	1.0

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.3 INTERVIEWED PASSENGERS BY MOST IMPORTANT STATES OF THE UNITED STATES

State	Absolute	Relative %
Total	677	100
Florida	88	13.0
California	107	15.8
New York	52	7.7
New Jersey	29	4.3
Pennsylvania	20	3.0
Ohio	22	3.2
Michigan	23	3.4
Illinois	22	3.2
Maryland	15	2.2
Washington	21	3.1
Texas	23	3.4
Massachusetts	25	3.7
Other	229	33.8
Unknown	1	0.1

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.4 INTERVIEWED PASSENGERS BY MOST IMPORTANT EUROPEAN COUNTRIES

Country	Absolute	Relative %
Total	216	100
Great Britain	110	50.9
Italy	43	19.9
France	21	9.7
Netherlands	12	5.6
Belgium	11	5.1
Germany	7	3.2
Switzerland	7	3.2
Spain	2	0.9
Other Europe	3	1.4

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.5 INTERVIEWED PASSENGERS BY MOST IMPORTANT CARIBBEAN ISLAND

Island	Absolute	Relative %
Total	151	100
Puerto Rico	125	82.8
Barbados	6	4.0
Guadeloupe	5	3.3
Martinique	3	2.0
U.S. Virgin Islands	2	1.3
Other	10	6.6

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.6 INTERVIEWED PASSENGERS BY MOST IMPORTANT OTHER COUNTRIES

Island	Absolute	Relative %
Total	11	100
Australia	6	54.5
Philippines	2	18.2
India	1	9.1
Other	2	18.2

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.7 INTERVIEWED PASSENGERS BY NUMBER OF CRUISE VISITS

Number of cruise visits	Absolute	Relative %
Total	1,151	100
First visit	916	79.6
More than once	235	20.4

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.8 INTERVIEWED PASSENGERS BY TOTAL NUMBER OF VISITS

Number of visits	Absolute	Relative %
Total	1,151	100
First visit	878	76.3
Second visit	185	16.1
Third visit	40	3.5
Four or more visits	45	3.9
Unknown	3	0.3

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.9 DID THE PRESENCE OF ARUBA ON THE CRUISE ITINERARY INFLUENCE THE INTERVIEWED PASSENGERS' DECISION TO COME TO ARUBA?

Response	Absolute	Relative %
Total	1,152	100
Yes	558	48.4
No	591	51.3
Unknown	3	0.3

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.10 SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING DECISION TO VISIT ARUBA IF ARUBA'S PRESENCE ON THE ITINERARY INFLUENCED THE PASSENGERS' DECISION TO COME TO ARUBA

Source of information	Absolute	Relative %
Total	558	100
Friends / Relatives	214	38.4
Travel Agents	173	31.0
Newspaper / Magazine	34	6.1
Television/Radio Ad	8	1.4
Internet	38	6.8
Tourist Board	8	1.4
Experience (prior visit)	51	9.1
Other	32	5.7

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.11 WHAT INFLUENCED PASSENGERS TO TAKE A CRUISE TO ARUBA IF ARUBA'S PRESENCE ON THE ITINERARY DID NOT INFLUENCE THE PASSENGERS' DECISION TO COME TO ARUBA

Influence	Absolute	Relative %
Total	591	100
Panama Canal	155	26.2
Friends & relatives	86	14.6
Vacation (the trip)/ rest / pleasure	76	12.9
Caribbean (other islands) in general	59	10.0
Attractive price / package (specials)	47	8.0
Cruising (Experience / take a cruise)	30	5.1
Cruise Line	24	4.1
Gift / Won a cruise (free)	18	3.0
Promotion (magazine / TV / travel agent)	14	2.4
Special occasion (anniversary)	10	1.7
Weather	9	1.5
The route (itinerary)	9	1.5
Honeymoon	7	1.2
South America	10	1.7
Central America	3	0.5
Aruba	3	0.5
Repeat	3	0.5
Other	28	4.7

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.12 INTERVIEWED PASSENGERS BY MARITAL STATUS

Status	Absolute	Relative %
Total	1,151	100
Never married	155	13.5
Married	866	75.2
Widowed	70	6.1
Divorced	52	4.5
Legally Separated	2	0.2
Unknown	6	0.5

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.13 INTERVIEWED PASSENGERS BY OCCUPATION

Occupation	Absolute	Relative %
Total	1,151	100
Legislators, senior officials and managers	135	11.7
Professionals	169	14.7
Technicians and associate professionals	167	14.5
Clerks	78	6.8
Service workers & shop & market sales workers	49	4.3
Skilled agricultural and fishery workers	2	0.2
Craft and related trades workers	31	2.7
Plant and machine operators and assemblers	13	1.1
Elementary occupations	8	0.7
Armed forces	4	0.3
Not economically active (Unemployed/Retired)	483	42.0
Unknown	12	1.0

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.14 INTERVIEWED PASSENGERS BY TRAVEL PARTY SIZE

Traveling party size	Absolute	Relative %
Total	1,151	100
Traveling alone (1)	57	5.0
Traveling party size of 2	813	70.6
Traveling party size of 3	76	6.6
Traveling party size of 4	123	10.7
Traveling party size of 5	20	1.7
Traveling party size of 6	16	1.4
Traveling party size of 7	11	1.0
Traveling party size of 8	12	1.0
Traveling party size of 9	4	0.3
Traveling party size of 10	19	1.7

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.15 INTERVIEWED PASSENGERS BY GENDER

Gender	Absolute	Relative %
Total	1,151	100
Male	642	55.8
Female	508	44.1
Unknown	1	0.1

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.16 INTERVIEWED PASSENGERS BY AGE GROUP

Age group	Absolute	Relative %
Total	1,151	100
Under 20 years	14	1.2
20 - 29 years	79	6.9
30 - 39 years	140	12.2
40 - 49 years	219	19.0
50 - 64 years	408	35.4
Over 64 years	290	25.2
Unknown	1	0.1

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.17 INTERVIEWED PASSENGERS BY YEARLY HOUSEHOLD INCOME GROUP

Income group	Absolute	Relative %
Total	1,151	113
Less than US\$20,000	42	4.1
US\$20,001 - US\$30,000	121	11.8
US\$30,001 - US\$50,000	220	21.5
US\$50,001 - US\$75,000	306	29.9
US\$75,001 - US\$100,000	186	18.2
US\$100,001 and over	156	15.2
Unknown	120	11.7

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.18 INTERVIEWED PASSENGERS BY EXPENDITURE PER CATEGORY

Expenditures in US\$	Absolute	Relative %
Total	112.11	100
Food & Beverage	6.00	5.4
Shopping	81.79	73.0
Excursions / Tours	4.10	3.7
Car rental	1.88	1.7
Taxis	1.88	1.7
Public transportation	0.08	0.1
Casino	6.90	6.2
Tax free shopping	8.68	7.7
Telephone & Internet	0.39	0.4
Other	0.40	0.4

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.19 INTERVIEWED PASSENGERS BY COST OF CRUISE PACKAGE AND TOURS BOUGHT ON BOARD OF SHIP

In US\$	Absolute
Package cost	\$1,398.07
Tours / Excursions bought on board of ship	\$16.57

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.20 INTERVIEWED PASSENGERS BY MOST ENJOYABLE ASPECT OF TRIP TO ARUBA

Most enjoyable aspect	Absolute	Relative %
Total	1,151	100
Shopping	109	9.5
Beaches	252	21.9
Sightseeing	355	30.8
Tours (attractions / recreations)	36	3.1
Casino	9	0.8
Meeting the people of Aruba	92	8.0
Everything	162	14.1
Watersports (Snorkeling & Diving)	23	2.0
Submarine	13	1.1
Clean / safe (relaxed / quiet)	23	2.0
Weather (Climate)	18	1.6
Architecture	11	1.0
Other	41	3.6
Nothing	5	0.4
Unknown	2	0.2

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.21 INTERVIEWED PASSENGERS BY LEAST ENJOYABLE ASPECT OF TRIP TO ARUBA

Least enjoyable aspect	Absolute	Relative %
Total	1,151	100
Nothing	713	61.9
Weather	99	8.6
Shopping	68	5.9
Casino	26	2.3
Shops close too early & Sundays	25	2.2
Expensiveness	11	1.0
Traffic	13	1.1
Bus / taxi / car rental service (tour)	18	1.6
Walking (distance to town)	7	0.6
Aggressive sellers (flyers) & beggars	13	1.1
Roads & no road signs	17	1.5
No power (electricity)	15	1.3
Telephone	5	0.4
Other	77	6.7
Sightseeing	12	1.0
Beaches	9	0.8
Unknown	23	2.0

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.22 INTERVIEWED PASSENGERS BY SATISFACTION RATES OF THE FOLLOWING ASPECTS

Satisfaction Rate	Very		Somewhat		Somewhat		Very	
	Dissatisfied	Dissatisfied	Dissatisfied	Satisfied	Satisfied	Satisfied	Unknown	
Shopping	1.1%	0.9%	3.6%	9.6%	36.5%	27.6%	20.7%	
Tours / Excursions	0.3%	0.7%	1.0%	2.9%	15.6%	33.4%	46.1%	
Local Transport.	0.1%	0.2%	0.3%	0.8%	2.3%	4.7%	91.6%	
Casino	0.4%	0.4%	0.6%	1.1%	3.4%	5.0%	89.1%	
Beaches	0.1%	0.3%	0.3%	1.0%	9.6%	32.2%	56.5%	
The people of Aruba	0.1%	0.0%	0.4%	1.4%	21.8%	52.9%	23.4%	
Telephone	1.0%	0.2%	0.4%	1.0%	2.3%	4.1%	91.0%	
Taxi	0.2%	0.3%	0.2%	1.4%	4.3%	9.0%	84.6%	
Quality of Service	0.3%	0.3%	0.4%	2.5%	22.5%	46.0%	28.0%	

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.23 INTERVIEWED PASSENGERS BY RATING OF VALUE FOR MONEY OF THE FOLLOWING ASPECTS

Satisfaction Rate	Very		Somewhat		Somewhat		Very	
	Dissatisfied	Dissatisfied	Dissatisfied	Satisfied	Satisfied	Satisfied	Unknown	
Shopping	1.0%	1.7%	4.3%	13.1%	38.9%	19.3%	21.7%	
Tours / Excursions	0.2%	0.4%	1.1%	5.3%	20.8%	24.1%	48.1%	
Local Transport.	0.1%	0.1%	0.2%	0.4%	3.1%	3.4%	92.7%	
Taxi	0.2%	0.5%	0.8%	1.9%	7.0%	5.8%	83.8%	

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.24 WHAT PRIMARY FACTORS INFLUENCED PASSENGERS' SHOPPING DECISION

Primary Factors	Absolute	Relative %
Total	1,151	100
Price of goods	259	22.5
Accessibility of shops	71	6.2
Product specific to Aruba	412	35.8
Good service	145	12.6
Did not shop	15	1.3
Other	58	5.0
Nothing	8	0.7
Unknown	183	15.9

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.25 CONSIDERING PASSENGERS' EXPENDITURES ON-SHORE, PASSENGERS SPENDING PATTERN WOULD HAVE BEEN DIFFERENT IF THERE HAD BEEN:

Other Factors	Absolute	Relative %
Total	1,151	100
More varied shopping	148	12.9
More value for money	258	22.4
More things to do / places to go	88	7.6
Better transportation to stores / attraction	29	2.5
Less aggressive selling or "push" to buy	19	1.7
Would not make any difference (nothing)	153	13.3
If shops open longer / more time (on Sundays)	71	6.2
More time to shop	53	4.6
Don't like to shop	9	0.8
Everything was O.K.	62	5.4
Other	41	3.6
Unknown	220	19.1

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.26 BASED ON THE PORTS JUST VISITED, THE CHOICE OF PORT THE PASSENGERS WOULD LIKE TO RETURN TO IF THEY WERE TO TAKE ANOTHER CRUISE WOULD BE:

Choice of vacation	Absolute	Relative %
Total	1,151	100
Aruba	425	36.9
All (Caribbean)	10	0.9
Bahamas	6	0.5
Barbados	18	1.6
Cayman island	22	1.9
Costa Rica	7	0.6
Consumel	6	0.5
Curacao	16	1.4
Mexico	7	0.6
Panama (canal)	12	1.0
Grenada	7	0.6
Jamaica	8	0.7
Puerto Rico	4	0.3
St. Barths	4	0.3
St. Lucia	3	0.3
St. Thomas	13	1.1
Not the Caribbean	10	0.9
No opinion (Aruba was first port)	527	45.8
Other	27	2.3
Unknown	19	1.7

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.27 BASED ON THIS TRIP, WHAT ARE INTERVIEWED PASSENGERS LIKELY TO DO ON THEIR NEXT VACATION

Willingness to return to Aruba	Absolute	Relative %
Total	1,151	100
Take another cruise	501	43.5
Visit Aruba for a land-based vacation	301	26.2
Combine cruise and visit Aruba (land-based)	99	8.6
Visit another Caribbean island (land-based)	97	8.4
Other	20	1.7
Go to Europe	27	2.3
Go to (or stay in) the US (road trip)	21	1.8
Go to Alaska	7	0.6
Go to Mexico	8	0.7
Go to Hawaii	5	0.4
Other island (not Caribbean)	5	0.4
Other part of the Caribbean	4	0.3
Do not know (no idea)	29	2.5
Something different / go elsewhere	7	0.6
Other country	15	1.3
Unknown	5	0.4

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.28 NUMBER OF CRUISE PASSENGERS OVER THE YEARS BY MONTH

Cruise passengers	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
January	12,769	13,032	21,893	29,780	32,027	32,985	34,206	45,589	42,649	45,283	69,955	67,677	77,102
February	12,496	9,824	20,515	23,289	23,501	26,122	33,922	43,601	42,516	39,445	64,504	59,304	67,877
March	15,056	10,540	21,000	27,123	28,447	29,267	33,948	47,508	39,495	48,736	74,361	68,732	70,602
April	12,555	11,562	20,864	26,561	29,706	27,711	31,487	33,561	28,298	24,017	58,732	62,834	73,027
May	15,584	8,749	11,997	11,931	14,927	15,467	17,318	3,037	2,362	3,948	14,213	13,363	30,695
June	8,361	7,550	11,452	14,853	8,284	19,224	16,564	2,745	3,050	0	12,590	16,287	22,150
July	9,198	8,877	12,962	14,479	11,804	20,480	18,796	2,666	2,465	0	10,026	13,040	25,234
August	9,332	11,307	13,501	15,726	10,487	22,583	18,625	4,209	3,412	604	10,415	16,285	25,737
September	6,675	7,234	8,980	13,108	7,972	15,686	13,401	1,906	4,108	1,365	14,908	11,076	16,654
October	9,947	13,134	18,677	18,112	26,040	23,284	21,132	26,115	14,162	14,298	32,828	36,576	36,473
November	10,538	11,680	25,955	22,680	27,033	24,069	32,206	38,691	29,216	46,554	56,137	52,163	66,988
December	7,458	19,706	28,791	33,462	36,910	37,078	45,189	47,852	46,096	64,802	71,336	69,959	69,656
Total cruise passengers	129,969	133,195	216,587	251,104	257,138	293,956	316,794	297,480	257,829	289,052	490,005	487,296	582,195

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

2.29 NUMBER OF CRUISE CALLS OVER THE YEARS BY MONTH

Cruise passengers	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
January	23	20	34	44	52	43	36	38	38	37	51	43	46
February	19	15	28	35	35	33	29	40	40	32	47	37	42
March	24	18	32	41	41	36	33	36	37	37	52	45	40
April	21	20	31	38	39	31	25	26	26	20	38	40	40
May	23	10	19	19	24	15	12	5	7	6	7	5	13
June	10	10	18	17	11	15	11	5	7	0	5	5	11
July	12	11	20	16	14	16	13	6	4	0	4	4	12
August	11	18	18	21	14	18	15	10	9	4	9	10	16
September	11	14	15	17	17	17	15	7	9	5	9	11	14
October	20	22	26	24	31	26	18	18	16	13	23	23	22
November	13	21	34	31	29	25	26	26	25	31	36	33	40
December	11	29	45	49	38	36	40	40	37	45	50	42	41
Total cruise calls	198	208	320	352	345	311	273	257	255	230	331	298	337

Source: Cruise Visitor Survey 2002 - Central Bureau of Statistics-Aruba

3. PURPOSE AND METHODOLOGY

3.1. Purpose of the Cruise Survey

3.1.1. Background of the Cruise Survey

This report is the result of the second Cruise Survey held by an Aruban government entity which is the Central Bureau of Statistics. A previous survey has done in 1997 by the Central Bureau of Statistics with the cooperation of the Cruise Tourism Authority.

Tourism has become one of the major economic sources of the island. Therefore, the use of up-to-date, reliable and comprehensive data is imperative for a successful operation in both the public and private sector. In order to improve the product and implement new marketing strategies, it is important for the policy makers to determine the characteristics of the visitors; how and why they choose Aruba as their destination, who they are, where they come from, how much they spend during their stay and how satisfied they are with the product Aruba. The survey also provides detailed socio-economic characteristics of the visitors, which is important for the definition of appropriate target groups.

The Cruise Survey held in 1997 was an initiative of the Cruise Tourism Authority. In the year 2002, which is 5 years later, the Central Bureau of Statistics chose to carry out another Cruise Survey. The results of the survey in 2002 were primarily used to compare the results with the results of a survey held in 1997. Later on a comparative study could be done to compare both survey results, 1997 and 2002, to the results of a survey done in 1995 by Price Waterhouse LLP and Florida-Caribbean Cruise Association.

3.1.2. Purpose of the Cruise Survey

The Cruise Survey provides the following information:

1. Socio-economic characteristics
2. Passenger Expenditure
3. Level of Satisfaction

The results of the Cruise Survey will enable us to:

- Analyze existing trends and market developments in the cruise industry
- Produce the expenditure patterns of the passengers divided into their place of residence and other characteristics
- Provide information on the country's image among visitors

3.2. Methodology of the Cruise Survey

3.2.1. Set up of the survey

The Cruise Survey took place in the phases. The first period was took place from April 16 thru April 30, 2002 and the second period was from November 26 thru December 10, 2002. The location of the Cruise Survey was in the main port of Aruba, APaardenbaai. The questionnaires were filled out by the interviewers, whom were highly qualified to do this work and the interviewers received training by the project leader and assistants of the Central Bureau of Statistics prior to the fieldwork. The training included how to locate, identify, contact, greet and examine the respondents, as well as how to record responses and terminate the interview. Above all, they were instructed on the importance of following instructions and procedures for the interviews.

Eventhough the survey questions in 2002 remained almost the same as the survey in 1997 for comparative reasons, a new questionnaire was designed in order to make the scanning process of the forms easier. The questionnaire was designed in such a way that it presents the questions with its possible numbered answers with little space for open questions. This time it did not contain coding aids since no manual data-entry was necessary. The scanning system replaced the data-entry system since the year 2000. This scanning program was developed internally by the Central Bureau of Statistics automation department. Each questionnaire received a unique identification number on the front page in order to avoid duplication in the data.

Throughout the interview period a total of 1,151 questionnaires were filled out by the Central Bureau of Statistics survey team. In the first phase a total of 583 questionnaires were filled out and in the second phase 568, reaching a total of 1,151.

We chose for face-to-face interviews, due to the fact that this approach gives a higher response rate and a minimum margin of error. Advantages of a face-to-face interview are:

1. All passengers boarding the ship must come through the gates of the port
2. It can provide extensive information on their expenditures and satisfaction

A disadvantage could be the limited time to cooperate by the passengers. It is worth mentioning, though, that most of the visitors were more than willing to cooperate with the surveys.

3.2.2. Definitions

In order to avoid any misunderstandings regarding definitions used in this study, we have listed the most used tourism-related definitions according to World Tourism Organization classifications and the occupations according to the International Standard Classification of Occupation 1988 (see literature list).

3.2.2.1. Tourism

Tourism Expenditure:

The total consumption expenditure made by a visitor or on behalf of a visitor for and during his/her trip and stay at destination. Tourism expenditure encompasses a wide variety of items, ranging from the purchase of consumer goods and services inherent in travel and stays to the purchase of small durable goods for personal use, souvenirs and gifts for family and friends.

The purchases which should be excluded are:

- Purchases for commercial purposes
- Capital investments or transactions engaged in by visitors
- Cash given to relatives or friends which does not represent payment of tourism goods or services, as well as donations made to institutions

Visitor:

Any person traveling to a place other than that of his usual environment for less than 12 consecutive months and whose main purpose of travel is one other than the exercise of a remunerated activity from within the place visited. Visitors are also classified as *tourists* if they spend the night away from home, or *same-day visitors* if they do not.

Same-day Visitor:

A visitor who does not spend the night in a collective or private accommodation in the place visited.

Place of Residence:

Consists of the place where the respondent has lived for most of the past year (12 months), or for a shorter period, if the respondent intends to return within 12 months to live there.

Travel party:

Define visitors who are traveling together during the whole or part of their trip and paying most of their expenses on the trip out of a common budget. The travel party normally comprises of individuals traveling together from a single household.

Purpose of Visit:

Purpose of visit refers to a motivation of the trip. The main purpose of visit refers to the reason in the absence of which, the trip would not have taken place or the given destination would not have been visited.

Package Tour

A package tour comprises a number of tourist products which are purchased by the visitor as a single entity. There is one single charge for the whole package, which is usually cheaper than the aggregated cost of the items if purchased separately by the visitor. It is identified as a separate item because visitors who are supplying their expenditure breakdown cannot reliably break down their package expenditure into its component parts.

Yearly household income

Income refers to gross income on a yearly basis. All data on income are presented in US\$. The yearly income includes salaries and wages from employment, profits from businesses, pension, welfare, alimony, etc. The yearly household income is the sum of the separate incomes of all members of the household.

The data will be presented in the following format:

- | | |
|----------------------------|-----------------------------|
| 1. Less than US\$ 20,000 | 4. US\$ 50,001-US\$ 75,000 |
| 2. US\$ 20,001-US\$ 30,000 | 5. US\$ 75,001-US\$ 100,000 |
| 3. US\$ 30,001-US\$ 50,000 | 6. US\$ 100,001 and over |

3.2.2.2. Occupation

Occupation refers to the kind of work done, by the person employed. To classify the data on occupation, the International Standard Classification of Occupation (ISCO-88) has been used. The ISCO provides a systematic classification structure which encompasses all occupations of the economically active population. The classification structure consists of four levels: major groups, sub-major groups, minor groups and unit groups. There are ten major groups.

The ten major groups of the ISCO classification are:

1. Legislators, senior officials, and managers;
2. Professionals;
3. Technicians and associate professionals;
4. Clerks;
5. Service workers and shop and market sales workers;
6. Skilled agricultural and fishery workers;
7. Craft and related trades workers;
8. Plant and machine operators and assemblers;
9. Elementary occupations;
0. Armed forces.

For analysis purposes we used the major groups only. In the following please find a description of the classification according to SCO-88.

1. Legislators, senior officials, and managers

This major group consists of occupations in which policy-making and high level management play a primary role. These functions can be executed in the private and public sector. Managers at a lower level do not belong to this category.

2. Professionals

This major group includes occupations whose main tasks require a high level of professional knowledge and experience in the fields of physical and life sciences, or social sciences and humanities. The tasks of the members of this group consist of increasing knowledge and experience, applying scientific concepts and theories to the solution of problems, and teaching the foregoing in a systematic manner.

3. Technicians and associate professionals

This major group requires technical knowledge and experience in one or more fields of physical and life sciences, or social sciences and humanities. The main tasks consist of carrying out technical work connected with the applications of concepts and operational methods in the above-mentioned fields, and in teaching at certain educational levels.

4. Clerks

Occupations with as main tasks secretarial duties, operating word processors and other office machines, recording and computing numerical data, and performing a number of customer-oriented clerical duties, mostly in connection with mail services, money-handling operations, and appointments.

5. Service workers and shop and market sales workers

This major group consists of occupations which as main tasks provide services related to travel, house-keeping, catering, personal care, protection of individuals and property, and to maintain law and order, or selling goods in shops or on the market.

6. Skilled agricultural and fishery workers

The main responsibilities of this group consist of growing crops, breeding or hunting animals, catching or cultivating fish, conserving and exploiting forests, and, especially in the case of market-oriented agricultural and fishery workers, selling products to purchasers, marketing organizations, or at markets.

7. Craft and related trades workers

The main tasks of these occupations consist of extracting raw materials, constructing buildings and other structures, and making various products as well as handicraft goods.

8. Plant and machine operators and assemblers

The occupations within this major group are involved in operating and monitoring mining, processing, and production machinery and equipment, as well as driving vehicles and operating mobile plants, or assembling products from component parts. These occupations require the knowledge and the experience to operate this machinery.

9. Elementary occupations

This major group covers occupations which require the knowledge and experience to perform mostly simple and routine tasks involving the use of hand-held tools and in some cases, considerable physical effort. Only in a few cases do these occupations require personal initiative and judgment. The main tasks consist of selling goods in the street, door keeping and property watching, as well as cleaning, washing and pressing, and working as laborers in the fields of mining, agriculture and fishing, construction and manufacturing.

0. Armed forces

Members of the armed forces are those personnel who are currently serving in the armed forces, including auxiliary services, whether on a voluntary or compulsory basis, and who are not free to accept civilian employment. It includes conscripts enrolled for military training or other services for a specified period.

00. Not economically active population

For the benefit of the analysis we include also the following categories of not economically active population: income recipients, students, home makers and other non-economically active persons.

3.2.3. Preparation of the Cruise Visitor Survey

The preparation of the Cruise visitor Survey started in early 2002. The questionnaire, which is enclosed (see annex 1), was prepared based on the questionnaire used in 1997 for comparative reasons. In 1997 the questionnaire used was compared to the questions of the survey held by Price Waterhouse and Florida-Caribbean Association as guideline for comparisons. The questionnaire was prepared in English and can eventually be expanded into more languages in case of more surveys. For the training of the interviewers, a manual was prepared in which explanations were given on how to conduct the survey.

3.2.4. Sampling

The main objective of this survey is to gather representative information on the different categories of cruise tourism expenditures. This implicates the use of a random (a-select) sampling method. The ships that participated during the survey period, eventhough not really chosen at random, were not selected by choice either. The ships that visited Aruba were chosen by chance based on the two beforehand chosen periods by the CBS. The approached passengers were chosen at random to participate with the survey.

The survey sampling size (sample population) needed to be no less than 1,020 respondents in order to have a result which can be considered to be representative for the whole population. The number of the sample is calculated based on the following formula:

$$n = \frac{z^2 * s^2}{e^2}$$

n = sample size
z = confidence level
s = standard deviation
e = margin of error

The calculated sample size obtained needs to be sufficient so that even the expenditure with the smallest value is representative to make generalizations. The sample size calculation was also made with the conditions that the result has to be 95 percent confident with a margin of error of 5 percent.

The stratification of the population is based on the size (capacity) of the ships that were scheduled to come to Aruba in the chosen survey period or the number of passengers on board of the ships. The relative distribution of the passengers on board of all of the ships has been used. The 1,020 respondents were evenly distributed over the two

chosen survey periods and then relatively over the number of ships in each survey period. Each interviewer was provided with a cruise schedule to enable them to better plan their interviews.

The results of the survey offers information that is hardly available in Aruba. For this reason, some generalizations were made while keeping in mind that it has a margin of error of 5 percent.

3.2.5. Fieldwork

The fieldwork took place every day starting April 16 to April 30 and November 26 to December 10. Due to the fact that the interviewers were instructed to carefully select respondents according to the sampling plan as indicated above, they were supervised by a Central Bureau of Statistics team and also in case that they encountered any problems for which they were not prepared to handle themselves they could request assistance.

At the end of each day the completed questionnaires were taken to the Central Bureau of Statistics and evaluated by the supervisors in each of the following four areas:

- Legibility - are all responses to all questions readable?
- Intelligibility - are responses to open-ended questions understandable?
- Completeness - are all questions answered?
- Consistency - are all answers recorded in a given instrument consistent with one another?

If the questionnaire did not meet with one of the requirements, the interviewer was requested to either revise it or complete an extra interview.

3.2.6. Data Processing & Analyzing

The department of Tourism Statistics is responsible for the control, verifying, and editing of the questionnaire data while the department of Automation assisted with the scanning program and the scanning process. The control of the forms consisted of execution of validity and consistency tests. Variables related to expenditures during and/or prior to passengers visit and other variables were checked for (scanning) reading errors during the control and verifying process. During the editing phase, other consistency checks were applied to try to eliminate possible errors in the data. Here is where the average calculations were made based on each respondent's recorded expenses. The use of outlier has not been applied eventhough in some expenditure categories, very large numbers were left out by using standard deviation principle. Outliers are unusual large or small observations relative to the other values in the data set.

According to the W.T.O. (World Tourism Organization), unusual large or small observations can also happen in reality and for this reason, in reasonable circumstances, should not be left out of the set of data. Instead of using the outlier, the recorded expenditure information is double checked for errors. A frequency of the data is run and a cumulative percentage is applied to the frequency. The frequency of the data set appearing between the percentages 95 to 100 were checked for consistency and double checked for data-entry errors. After correction of the mistakes or confirmation of correct answers, the data set is ready to be used.

The principle of standard deviation was applied to the data set this time. After some findings during the editing process, this principle was applied to leave out all the large numbers which exceed three times the standard deviation. The decision to use this principle was taken in order to reach an expenditure average which is representative for the total cruise population. Finally different tables were made.

4. ANNEX

4.1. Annex 1- Cruise Visitor Survey Questionnaire