



# Cruise study

Satisfaction and spend of cruise visitor 2016

Cruise spend updated based on rounding of  
spend data



# Cruise visitor YTD August 2016

	PAX			CALLS			AVG PAX PER SHIP		
	2016	2015	% GROWTH	2016	2015	% GROWTH	2016	2015	% GROWTH
January	101,534	77,820	30.5%	52	42	23.8%	1953	1853	5.38%
February	81,574	76,067	7.2%	38	38	0.0%	2147	2002	7.24%
March	96,736	61,105	58.3%	48	34	41.2%	2015	1797	12.14%
April	50,579	49,644	1.9%	26	24	8.3%	1945	2069	-5.95%
May	20,462	26,447	-22.6%	8	13	-38.5%	2558	2034	25.73%
June	25,452	22,243	14.4%	7	9	-22.2%	3636	2471	47.12%
July	18,921	23,627	-19.9%	8	10	-20.0%	2365	2363	0.10%
August	22,557	23,282	-3.1%	11	10	10.0%	2051	2328	-11.92%
<b>YTD August</b>	<b>417,815</b>	<b>360,235</b>	<b>15.98%</b>	<b>198</b>	<b>180</b>	<b>10.0%</b>	<b>2110</b>	<b>2001</b>	<b>5.44%</b>

**Insight: YTD August 2016 the cruise visitor grew by 16% in comparison to YTD August 2015**

*"In my opinion Aruba is the .....place on earth".*

<b>Best</b>	<b>23.4%</b>	<b>a "Good/Nice"</b>	<b>3.6%</b>	<b>most Fun</b>	<b>0.8%</b>
<b>Most Beautiful</b>	<b>21.5%</b>	<b>Hottest</b>	<b>3.3%</b>		
<b>Friendliest</b>	<b>18.2%</b>	<b>Most Special</b>	<b>3%</b>		
<b>Happiest</b>	<b>12.9%</b>	<b>Sunniest</b>	<b>1.4%</b>		
<b>Best beach destination</b>	<b>5.2%</b>	<b>most Relaxing</b>	<b>1.4%</b>		
<b>Tropical paradise</b>	<b>5%</b>	<b>An ordinary</b>	<b>1.1%</b>		

**Insight:** The results indicated that the word "best" is number one and scored the highest. Interestingly happy did not score as high. The "best" scored should be seen as "Aruba is the best amongst the visited islands/ports in the Caribbean"



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# Introduction

# Introduction & methodology

One of the objectives of A.T.A. is to increase the tourism receipt by 6%, it is therefore crucial for A.T.A to understand the spending and on-island behavior of all its visitors, both stay-over and cruise visitors.

Therefore, the Strategy, Planning and Research (SPR) conducted a study amongst the cruise visitors to research mainly the spending and on-island behavior of these visitors. Besides the aforementioned the purpose of this study was also to investigate the travel habits of cruise visitors, conversion possibility cruise to stay-over visitors, rating and description of Aruba as a destination and finally, key product recommendations that will facilitate the cruise visitors during their visit to Aruba.

The study ran from March 2016 to April 2016, during which 460 face to face interviews were conducted. SPR conducted this study using a random selection method.

This means all cruise visitor had access to participation in this study. This method was chosen to ensure that the results of the study is generalized to the entire population (total cruise visitors) and is statistically representative.

A sample of 384 surveys were needed to ensure a statistically representative sample. The SPR department collected a total of 460 responses.

Cruise visitors were invited by a trained data collector to participate in the study. As an incentive to complete the survey, participants received a small token of appreciation in the form of a A.T.A fan or pen.

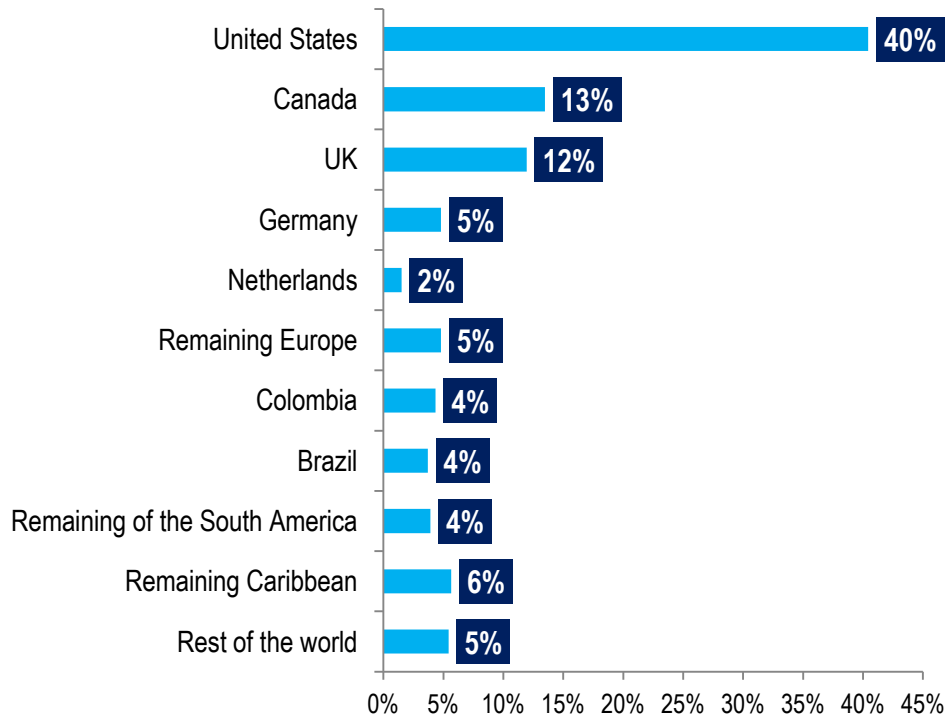
The results of this study will provide insights into the spending behavior of the cruise visitor in Aruba, their level of satisfaction with Aruba, the cruise visitors recommendation to maximize their time spend in Aruba, the cruise visitor's likelihood to return and finally, the cruise visitor's travel habits, Happy reading!

# Demographics

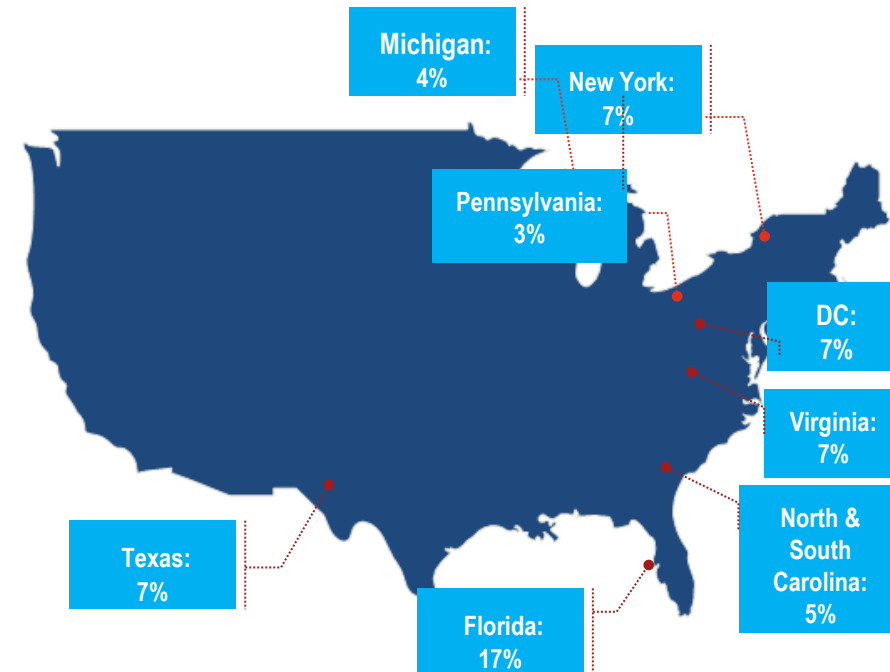
# Demographics

51.3% of the respondents were female, while the remaining participants were male (48.7%).

40% of the respondents are from the United States, followed by Canada (13%), UK (12%) and Germany (5%).



When zooming into the United States, 17% of the respondents are from Florida followed by DC (7%), New York (7%), Texas (7%), Virginia (7%), and North and South Carolina (5%).



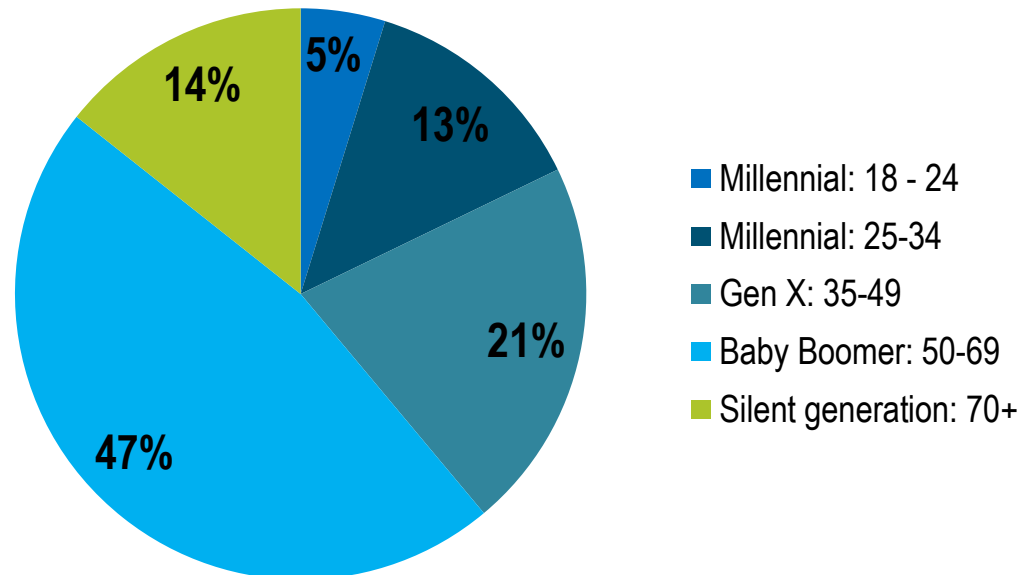


# Demographics

47% of the respondents are Baby Boomers (age 50 -69), followed by the Gen X (age 34 – 49) and lastly the Millennial generation.

The Millennial generation was split in two groups to reflect if the cruise trips are mostly used by the young Millennial (age 18-24) or the older Millennial (age 25- 34).

The results indicate this is mostly used by the older Millennial (25-34) (13%) vs. 5% of younger (18-24).

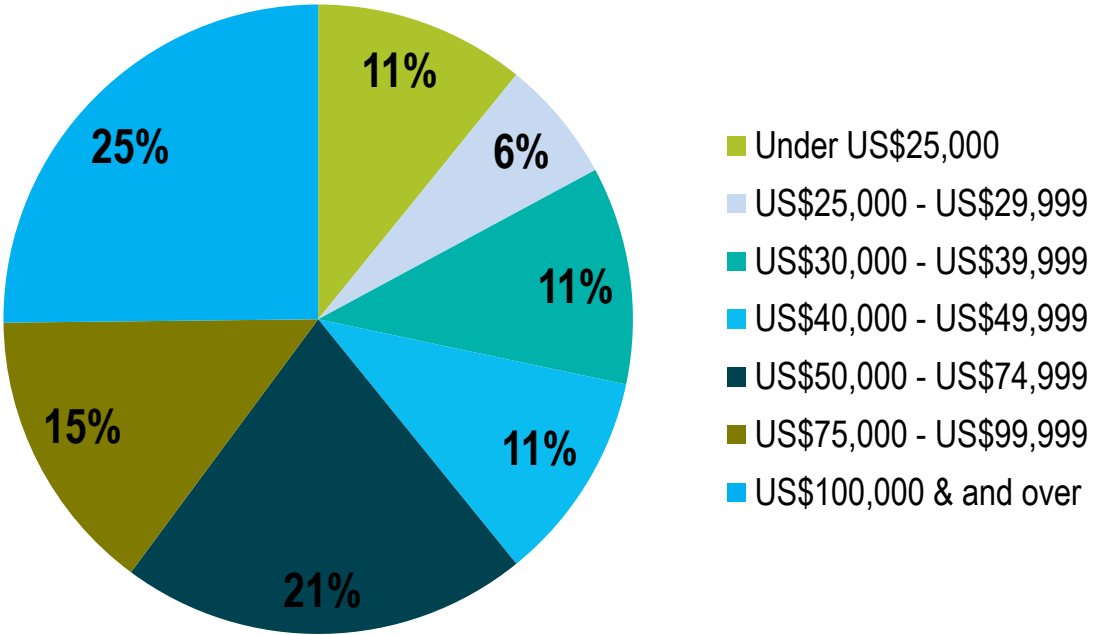


- Millennial: 18 - 24
- Millennial: 25-34
- Gen X: 35-49
- Baby Boomer: 50-69
- Silent generation: 70+

# Demographics

25% of the respondents have a (self reported) house hold income of US \$100k and plus.

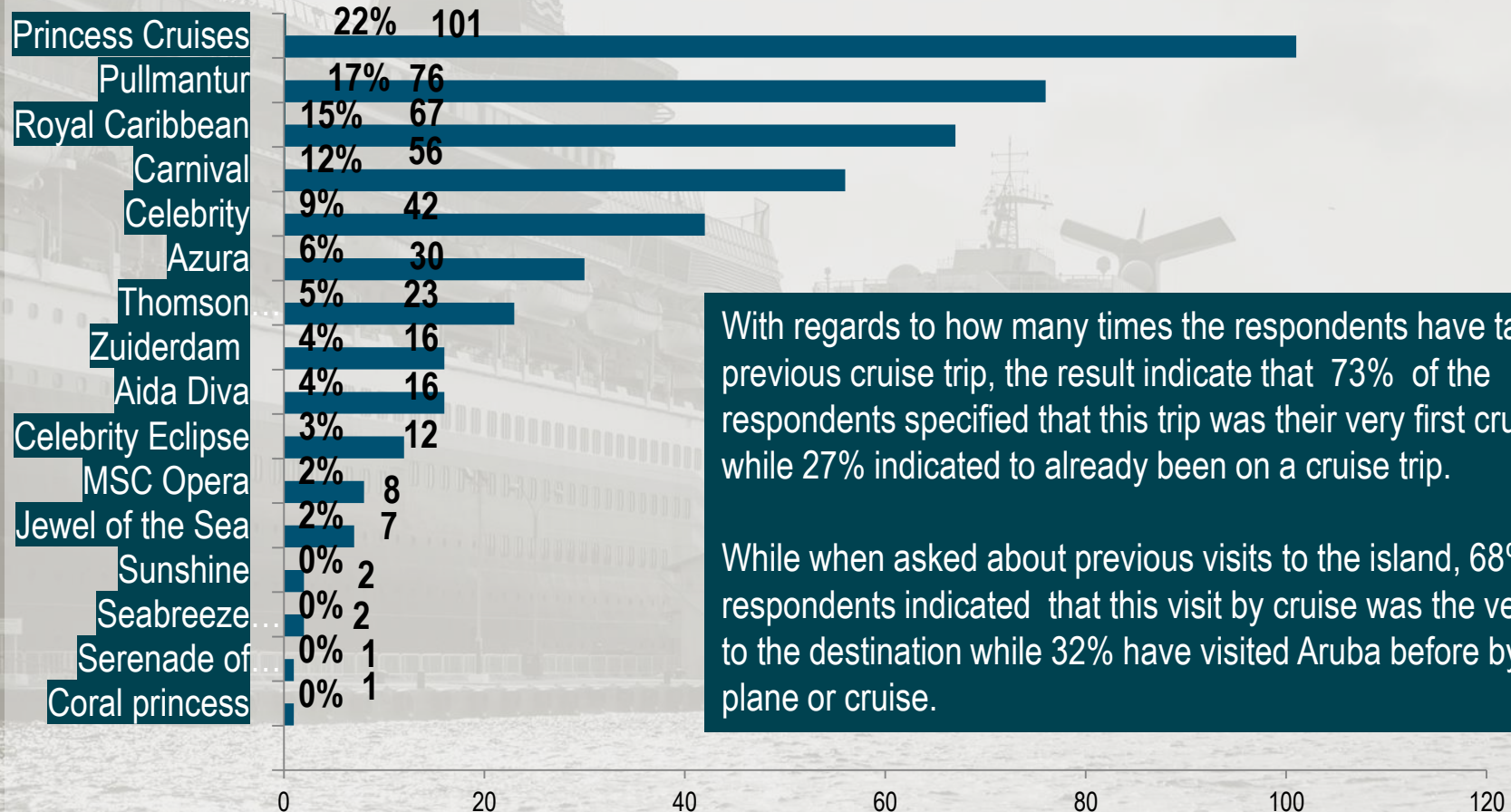
75% the respondents have (self reported) house hold income of less than US\$ 100K of which 39% indicated to have a house hold income lower than US\$ 50K. The remaining 36% indicated to have an income between US\$50 – 99.9K.



# Demographics

The majority of the respondents were from Princess Cruises (22%), Pullmantur (16.5%), and Royal Caribbean (14.6%)

Insight: data indicates that cruise trips seemed to be a one-time experience (Repeat percentage is at 27% for taking a cruise trip).



With regards to how many times the respondents have taken a previous cruise trip, the results indicate that 73% of the respondents specified that this trip was their very first cruise trip while 27% indicated they had already been on a cruise trip.

While when asked about previous visits to the island, 68% of the respondents indicated that this visit by cruise was the very first time to the destination while 32% have visited Aruba before by either a plane or cruise.

# Demographics

45% of the cruise visitors from Carnival Cruise line have a Household income of US 100K and over, this is followed by Royal Caribbean (40%).

HH income by top 4 ships	Princess Cruises	Royal Caribbean	Pullmantur	Carnival
Under US\$25,000	9%	7%	21%	7%
US\$25,000 - US\$29,999	3%	2%	14%	5%
US\$30,000 - US\$39,999	11%	10%	23%	2%
US\$40,000 - US\$49,999	17%	2%	23%	5%
US\$50,000 - US\$74,999	24%	21%	7%	21%
US\$75,000 - US\$99,999	17%	17%	5%	14%
US\$100,000 & over	20%	40%	7%	45%

**Insight: About 40 – 45% of cruise visitors from Carnival and Royal Caribbean have household income of USD 100K+. About 60 – 55% have a household income of less than USD 100K**

**Whereas about 20% and 9% of visitors from Princess and Pullmantur have a household income of USD 100K+**



# Key Decision Factors

A large cruise ship with a white upper hull and a dark blue lower hull is docked at a port. The ship has multiple decks with balconies and a prominent radar dome on its upper structure. In the background, there are port buildings, cranes, and a multi-story building. The foreground shows the water and a rocky shoreline with palm trees on the right. A dark teal text box is overlaid on the right side of the image.

**“I have left my heart in so many ports”**



# Key decision factors



See Multiple Destinations, Unpack Only Once



Cruise vacation offers great value



Cruise Ships are Family Friendly

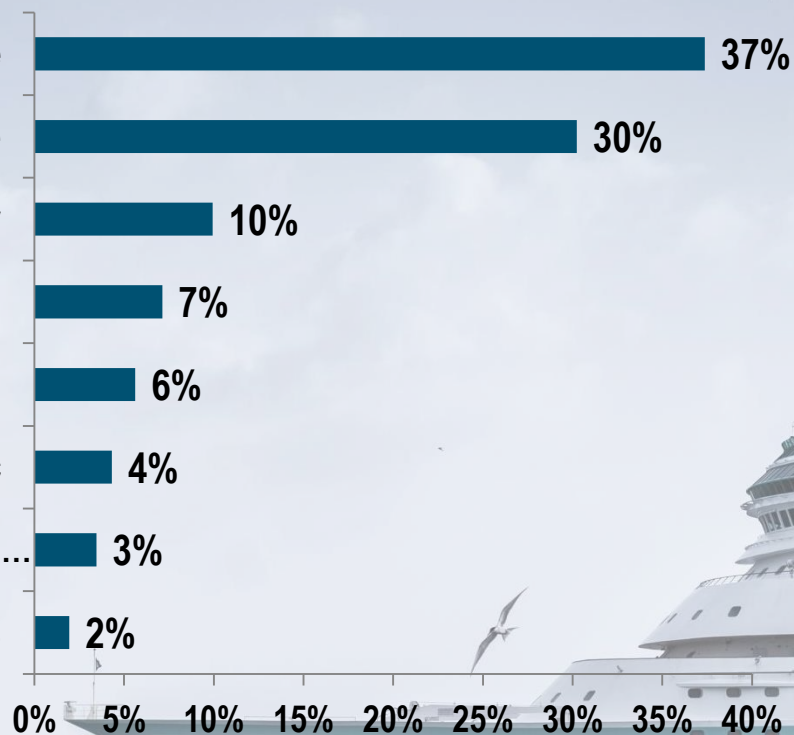
Cruise Vacations are Easy to Plan

Cruising is Social

Cruising Is Romantic

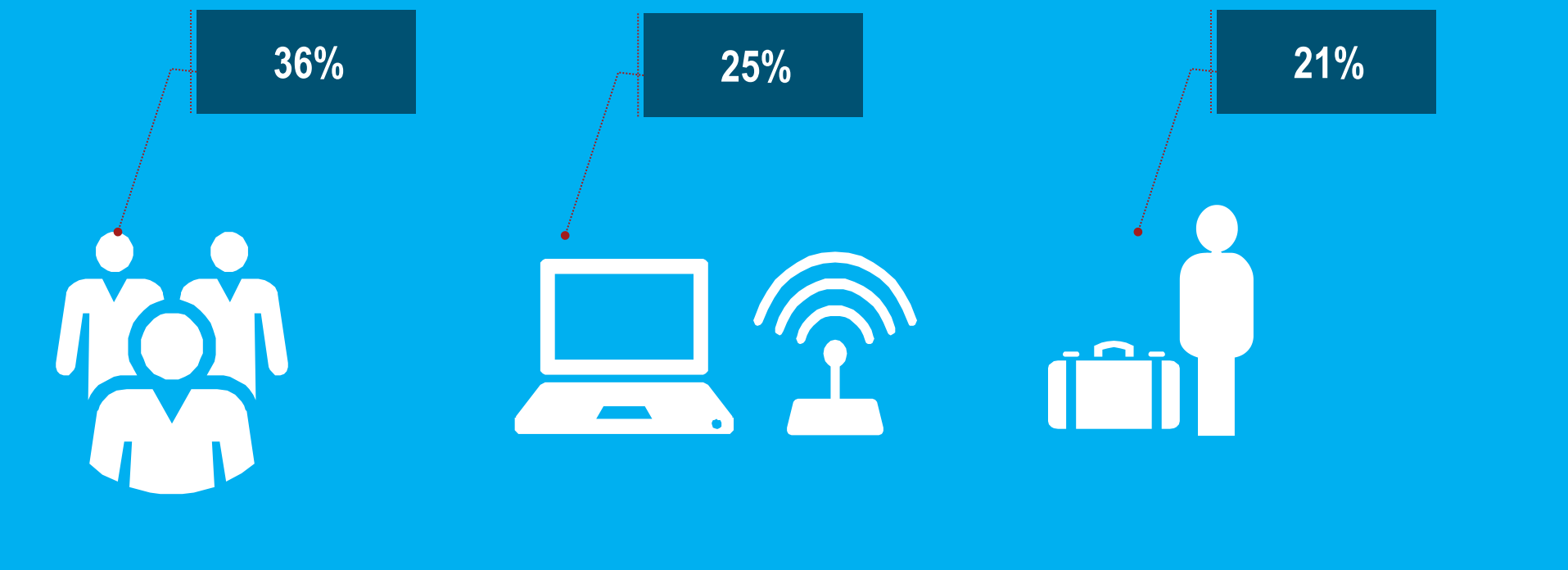
Cruising allows you to tailor to your own...

Ships Offer a Variety of Onboard Activities



# Key Decision Factors

For 36% of the participants, friends/ relatives were the main source of information followed by internet (25%) and travel agent (21%).

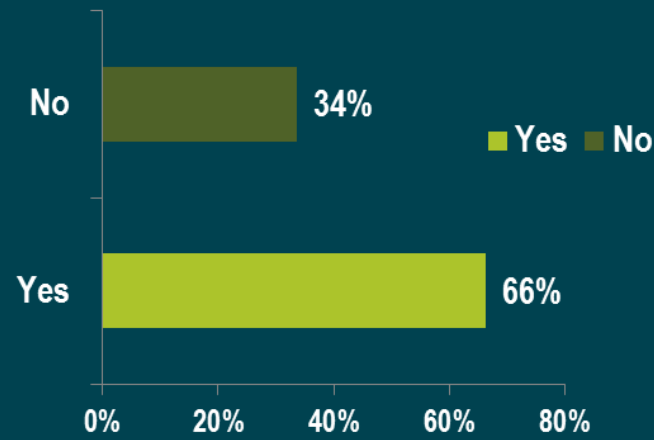


The remaining 18% indicated their main sources of information were News Papers(1%), Destinations (1%) followed by Social Media (2%), TV/Radio adds (2%) and Personal Experiences 12%

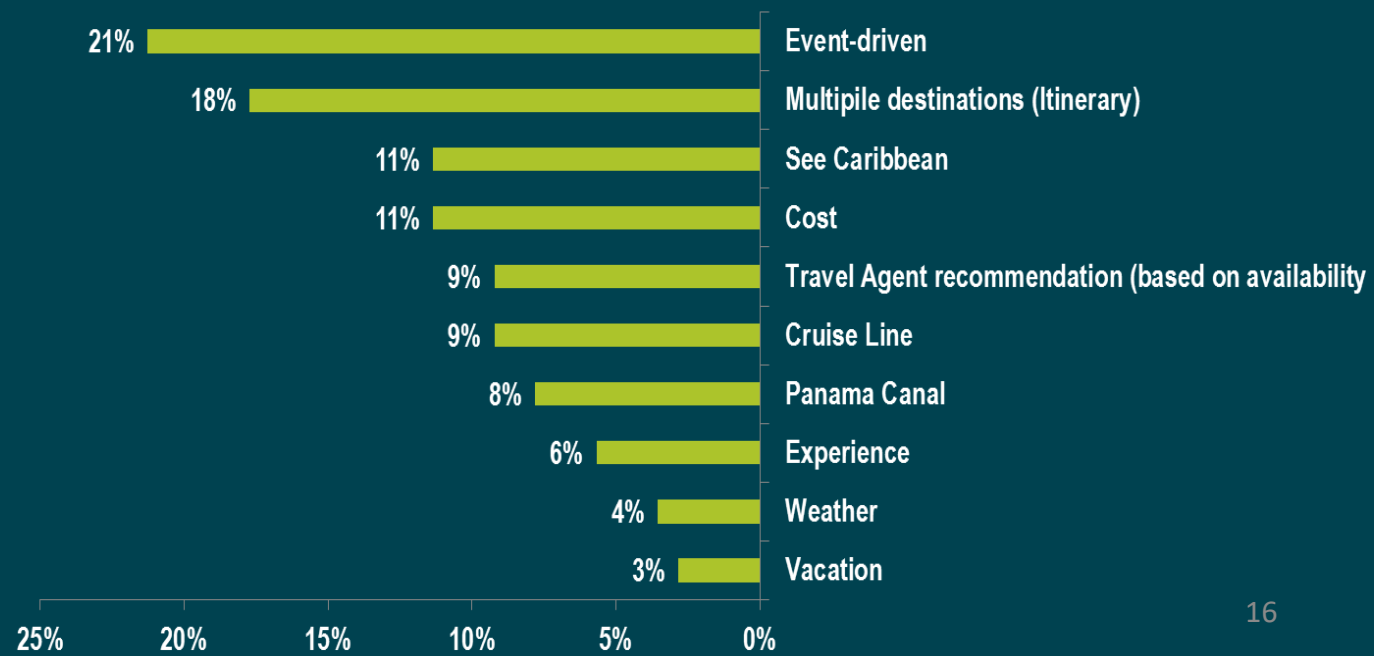
Q: 5 Which of the following sources of information was the single most important sources in making your decision to take this cruise ?  
N:460

# Key decision factors

66% of the participants indicated that Aruba being on the itinerary influence them to take the trip



For the remaining 34% the main purpose for their trip were event-driven vacation (Family trip, Honeymoon, anniversary) (21%) followed by multiple destinations (18%)



Q: 6 Did the presence of Aruba on the Itinerary influenced you to take the cruise?  
N:460

# Key Decision Factors

The number one main decision factor to take a cruise is to see multiple destinations. However, Aruba being part of the itinerary strengthened the decision to take the cruise.

			Did the presence of Aruba on the itinerary influence your decision to take this cruise?	
		Total answers	Yes	No
What influenced you to take your cruise trip? Please select the single most important	Cruise vacation offers great value	140	98	42
	See Multiple Destinations, Unpack Only Once	173	116	57
	Cruise Ships are Family Friendly	46	24	22
	Ships Offer a Variety of Onboard Activities	9	6	3
	Cruise Vacations are Easy to Plan	33	19	14
	Cruising Is Romantic	20	16	4
	Cruising is Social	26	18	8
	Cruising allows you to tailor to your own individual style and taste	16	10	6
Total		463	307	156

# Key insights

- The main motivation is multiple destinations, and unpack only once (37%)
- The main source of information is Friends and Family (36%)
- 66% of the respondents indicated that “Aruba” as destination stop was their main motivation to choose the cruise





# Cruise visitor spending in Aruba

“Yes, money can’t buy happiness,  
But, it’s more comfortable to  
cry in a BMW than on a  
bicycle”



# Cost of cruise trip

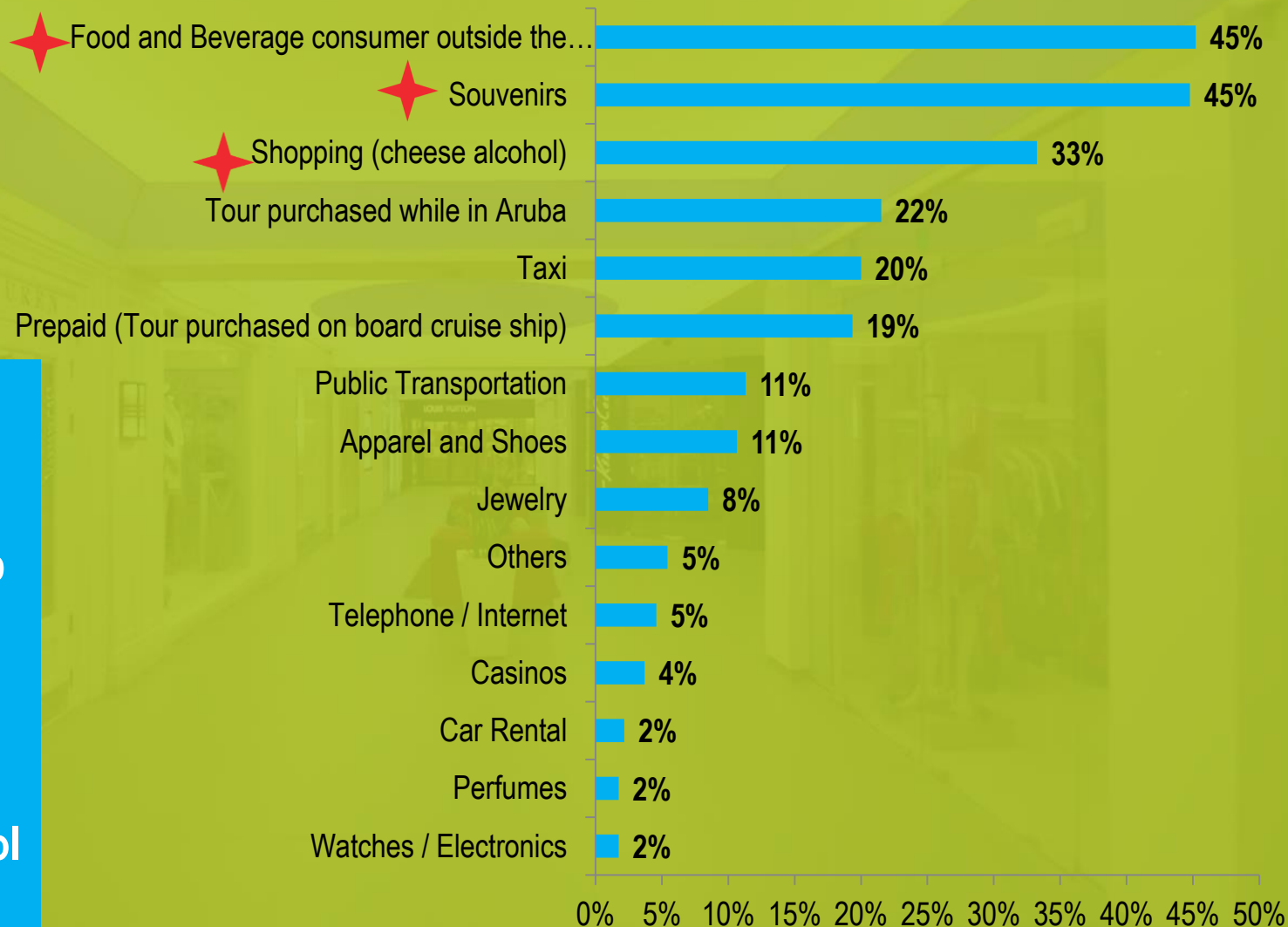
On average the total cruise trip cost per travel party USD 4,081. The majority of the travel party consists of 2 people meaning the cruise trip cost about USD 2,041 per person.

The average length of cruise trip is 11+ nights



Q: 6-8: What was the total cost of your cruise package for your travel party (including airfare) in USD  
How many person does this cover  
How long was your cruise trip  
N:460

# Cruise visitor spending in Aruba



## The top 3 spending categories are :

1. F&B outside the cruise ship (45%)
2. Souvenirs
3. Shopping (chocolate, cheese, alcohol etc.)

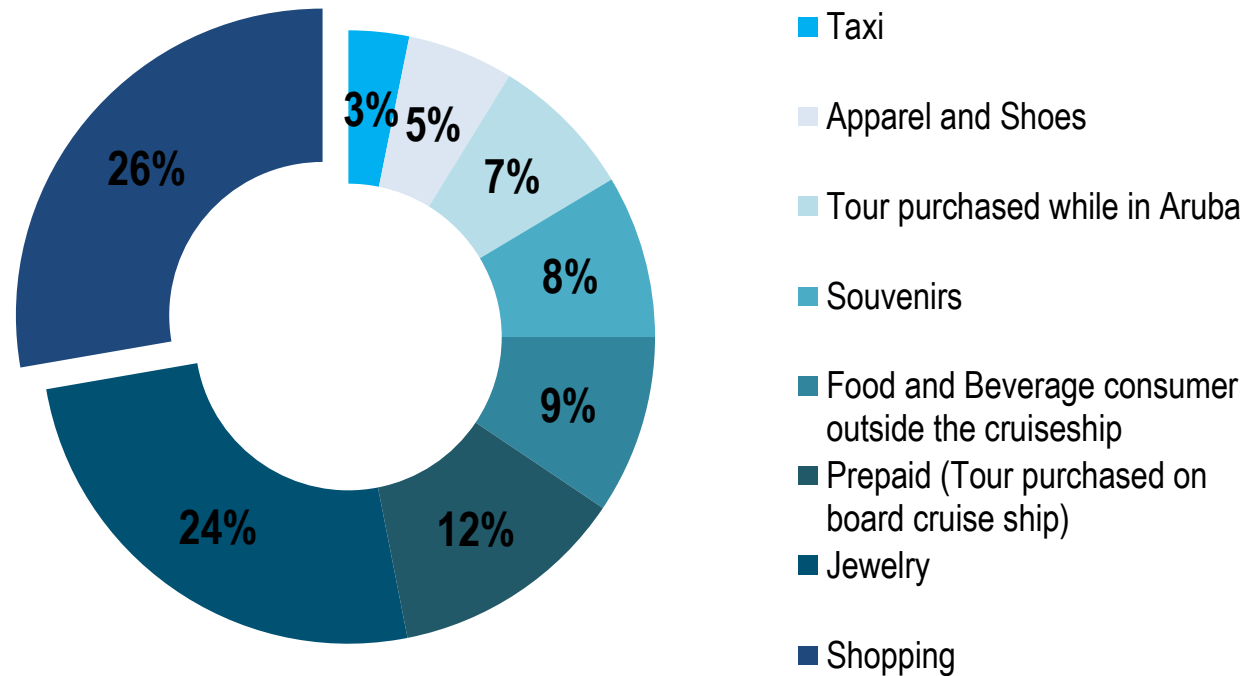


# Cruise visitor spending in Aruba

	Average spend per party in USD	% On island spend (weighted)	Average spend per party in USD (weighted)	Average spend per person in USD
Shopping (e.g. Alcohol, cheese, etc.)	185.86	33%	61.33	30.67
Jewelry	667.00	8%	53.36	26.68
Prepaid (Tour purchased on board cruise ship)	143.97	19%	27.35	13.68
Food and Beverage consumed outside the cruise ship	46.53	45%	20.94	10.47
Souvenirs	42.11	45%	18.95	9.47
Tour purchased while in Aruba	78.57	22%	17.28	8.64
Apparel and Shoes	107.86	19%	20.49	10.25
Taxi	35.26	20%	7.05	3.53
Casinos	159.71	4%	6.39	3.19
Others	58.64	5%	2.93	1.47
Watches / Electronics	149.38	2%	2.99	1.49
Car Rental	75.00	2%	1.50	0.75
Public Transportation	10.73	11%	1.18	0.59
Perfumes	52.50	2%	1.05	0.53
Telephone / Internet	13.33	5%	0.67	0.33
Total in USD			243.47	121.73
Total in USD (without Pre-paid tours)			216.11	108.06

# Cruise visitor spending in Aruba

On average about 26% of the cruise visitor's budget is spend on shopping (e.g. Alcohol, cheese, etc.), 24% on jewelry, 12% on Prepaid tours on ship, and 9% on F&B outside ship



Q: 9 What were your traveling expenditures in Aruba  
Please indicate the amount that apply to your traveling expenditure in Aruba  
N:460



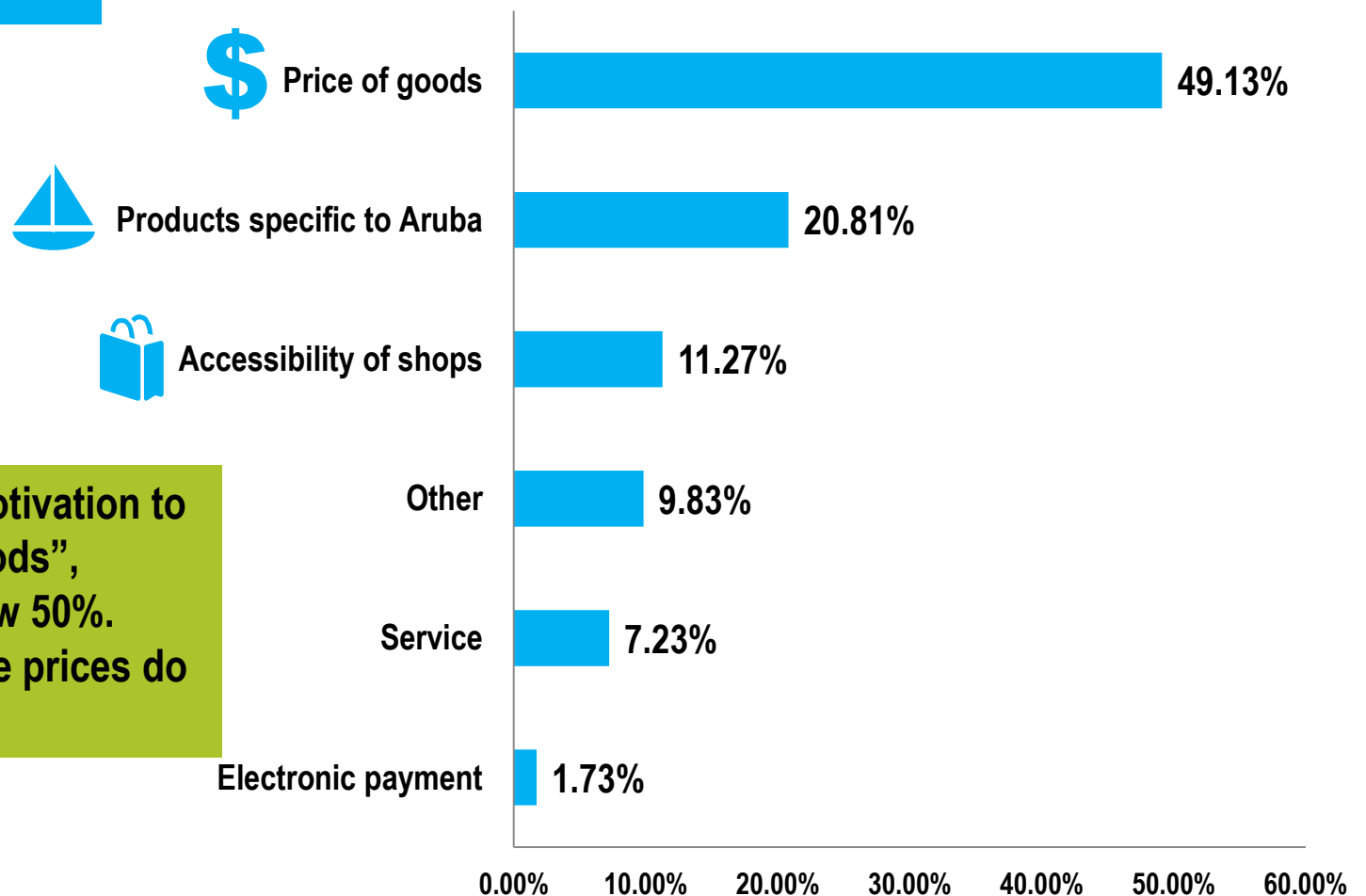
# Cruise visitor spending in Aruba

Average spend per person	Princess Cruises	Royal Caribbean	Pullmantur	Carnival	Others
Passengers (participated in study)	100	67	76	56	162
Shopping (e.g. Alcohol, cheese, etc.)	73	63	25	47	11
Jewelry	52	37	3	62	10
Prepaid (Tour purchased on board cruise ship)	8	25	14	25	9
Food and Beverage consumed outside the cruise ship	4	17	8	19	10
Souvenirs	10	12	9	14	7
Tour purchased while in Aruba	8	7	9	10	8
Apparel and Shoes	3	9	4	9	5
Taxi	3	4	2	3	5
Casinos	2	2	3	11	1
Others	1	1	1	6	2
Watches / Electronics	0.00	4	1	1	1
Car Rental	0.3	2	1	0.9	0.8
Public Transportation	0.4	0.06	1	1.0	0.8
Perfumes	1	0.4	0	1.2	0.3
Telephone / Internet	0.2	0.3	0.5	0.7	0.2
Total in USD	129	184	84	212	72
Total in USD (without Pre-paid tours)	121	159	70	187	63

**Insight:** Cruise visitors of Carnival are the highest spenders in Aruba, this is followed by Royal Caribbean. Carnival passenger spend the most on jewelry while Royal Caribbean spend the most on shopping.

# Cruise visitor spending in Aruba

## Motivation to Shop



**Insight:** The main motivation to shop is “price of goods”, however this is below 50%. Meaning in Aruba the prices do not seem attractive.

# Stagnation of spending

- In 2002 the CBS performed a cruise study and concluded that the average cruise visitors spend \$112.11 while in Aruba (including on board purchase excursions)
- In 2015 BREa performed a cruise study and concluded that the average cruise visitors spend \$112.10 while in Aruba (excluding on board purchased excursions)
- In 2016 A.T.A cruise study it is indicated that the average cruise visitor spend \$121.73 (including on board excursions) and \$108.06 (excluding on board purchased excursions)

**Insight: In the last 14 yrs. the spending has grown by 9% (2002 vs. 2016) (including on board excursions)**

**Insight: 2016 vs. 2015 spending (excluding on board purchased excursions) have dropped by 4%**

# Key Insights

- In terms of volume the top 3 spending categories are: F&B outside the ship, souvenirs and shopping (cheese, alcohol)
- In terms of spending amount the top 3 categories are: Shopping, Jewelry and Excursions (on ship)
- The average cruise visitor spends \$121.73 (including on board excursions)
- Stagnation of spend (2002 vs. 2016) a growth by only 9% (including onboard excursions)
- Drop in spending 2015 vs. 2016 by 4% (excluding onboard excursions)

# Aruba Rating



**“Aruba is the Friendliest place on earth”**

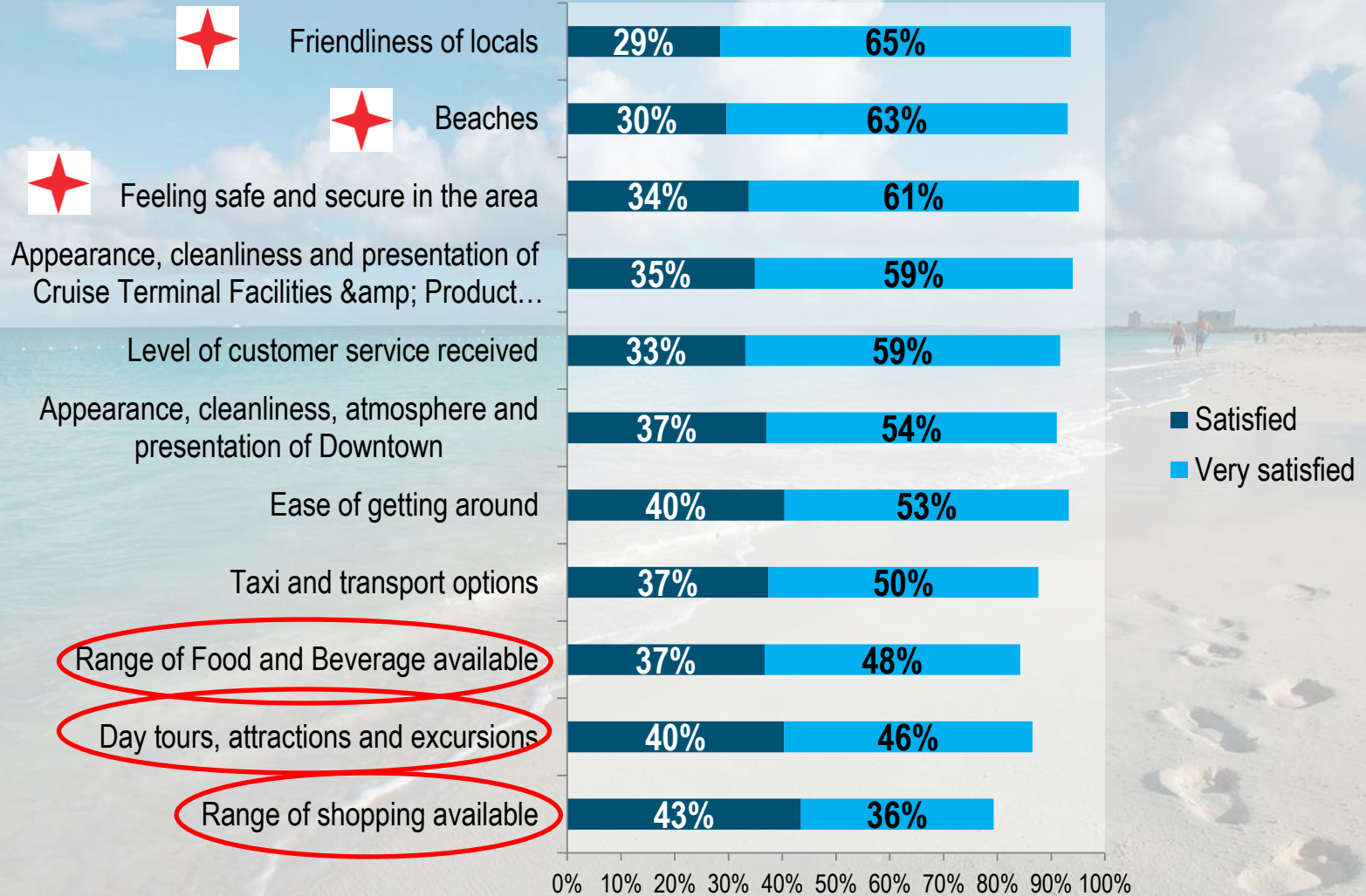
**“Aruba has the most beautiful and kind people on earth”**

**“Aruba is the best beach destination on earth”**

**“Aruba is the safest place on earth”**



# Aruba Rating



# Aruba Rating

	Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Satisfied	Very Satisfied
<b>Friendliness of locals</b>	0%	0%	1%	5%	29%	65%
<b>Beaches</b>	0%	1%	2%	4%	30%	63%
<b>Feeling safe and secure in the area</b>	0%	0%	1%	4%	34%	61%
<b>Appearance, cleanliness and presentation of Cruise Terminal Facilities and Product Offerings</b>	0%	0%	1%	5%	35%	59%
<b>Level of customer service received</b>	0%	0%	2%	5%	33%	59%
<b>Appearance, cleanliness, atmosphere and presentation of Downtown</b>	0%	1%	2%	6%	37%	54%
<b>Ease of getting around</b>	0%	0%	1%	5%	40%	53%
<b>Taxi and transport options</b>	0%	1%	4%	8%	37%	50%
<b>Range of Food and Beverage available</b>	1%	0%	3%	12%	37%	48%
<b>Day tours, attractions and excursions</b>	1%	1%	3%	9%	40%	46%
<b>Range of shopping available</b>	0%	1%	6%	13%	43%	36%

Q: 10: Concerning your visit to Aruba how would you rate the following aspects?

# Aruba rating-by generation

“Range of shopping available” was rated the lowest by the Millennial generation, only 5% was very satisfied with this aspect.

“Day tours and excursions” were rated the lowest by the Millennial generation, only (6%) were very satisfied.

The Gen X generation also rated this aspect low since only 7% rated this as high.

“Range of food” available were rated the lowest by the Millennial generation only 5% was very satisfied.

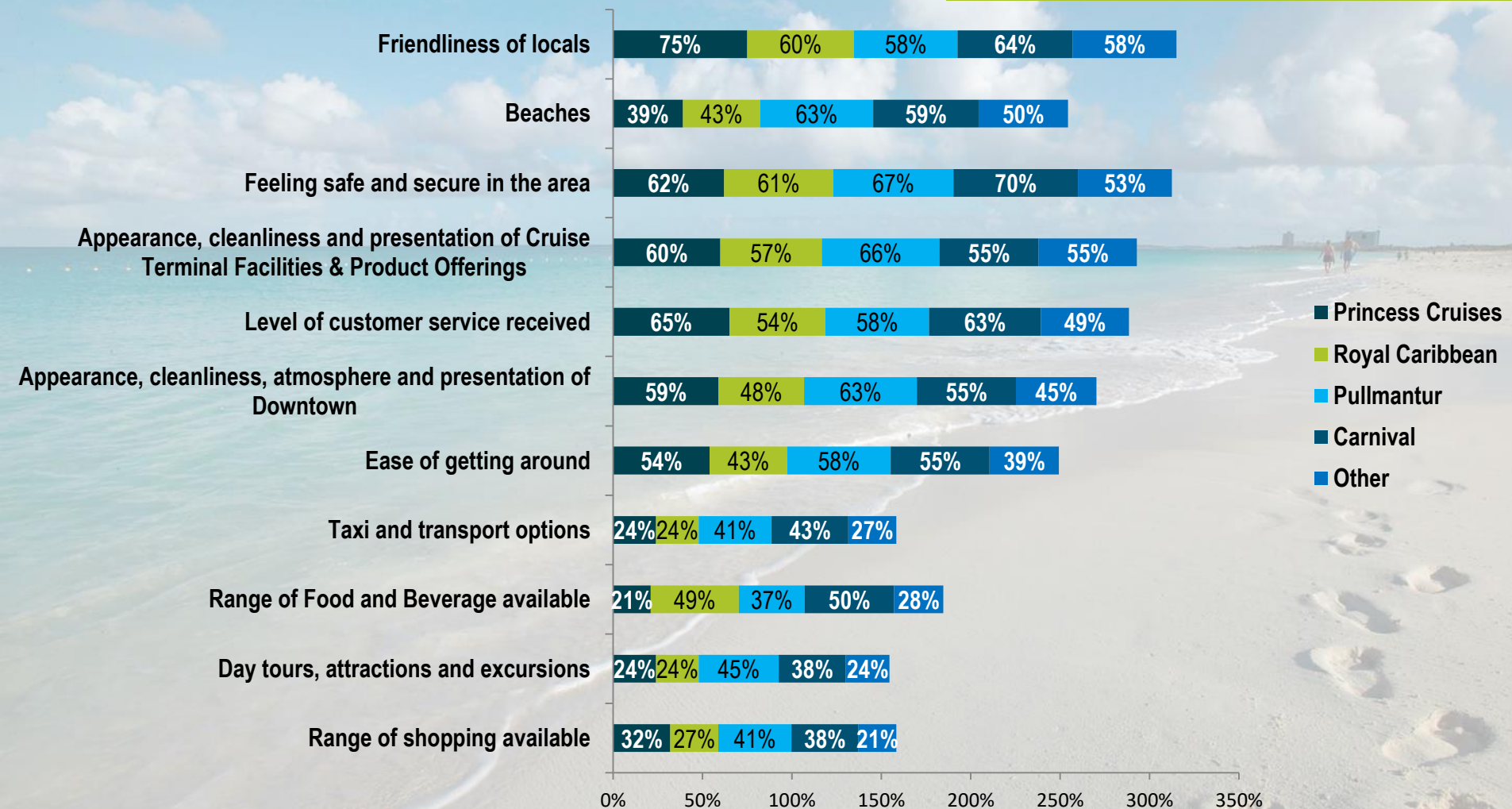
The Baby boomer generation also rated this low, only 13% was very satisfied with this.

**Insight: The younger generation were the main driver for the low rated aspects (Range of shopping, day tours and excursions and range of food available. With the later being driven by the Baby Boomers as well.**



# Aruba Rating

**Insight: Pullmantur cruise visitor are the most satisfied with Aruba followed by Carnival, Princess and Royal Caribbean**



Q: 10: Concerning your visit to Aruba how would you rate the following aspects? Answers for very satisfied by cruise ship



# Cruise visitor recommendation



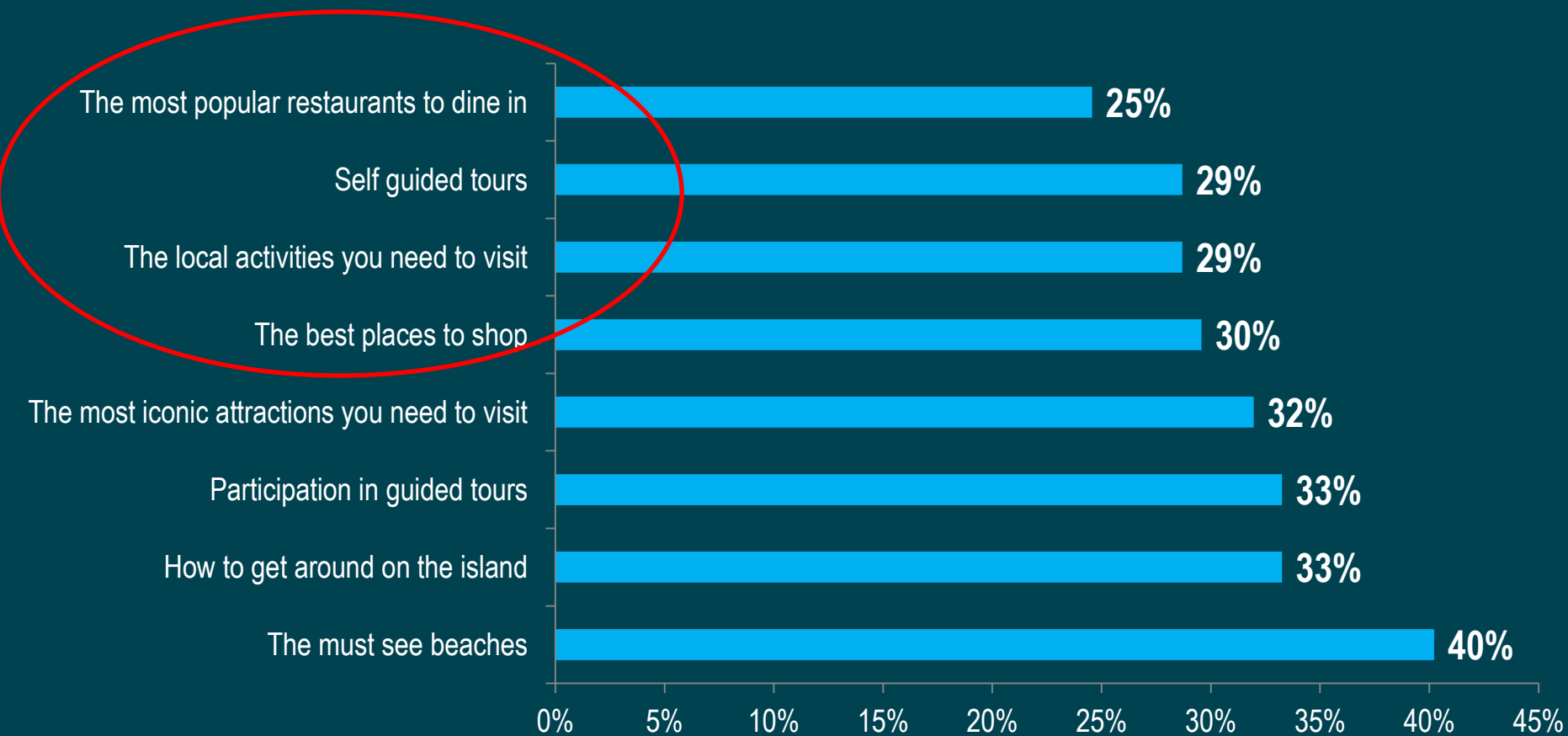
**“Visitors map with recommendations”**

# Cruise visitor recommendation



Q: 13: If you had less than 24 hrs on Aruba how would you spend your time ? N:460

# Cruise visitor recommendation



**Insight: Better information is needed on restaurant to dine in, self guided tours, local activities and best places to shop**

Q: 14: At the port did you get enough information on?  
Answers shown for strongly agree N:460

# Key Insights

- More information at the port or on ship about the most popular **restaurant to dine** in Aruba (25%)
- More information at the port or on the ship **about self-guided tours** in Aruba (29%)
- More information at the port or on the ship about **the local activities** (29%)
- More information at the port or on the ship about the places you need to shop (30%)



# Aruba- Product recommendations

- Better range of food and beverages accessible to cruise visitor
- Better range of shopping
- Better tours and executions offered
- A map with recommendations is helpful
- Access to Wi-Fi

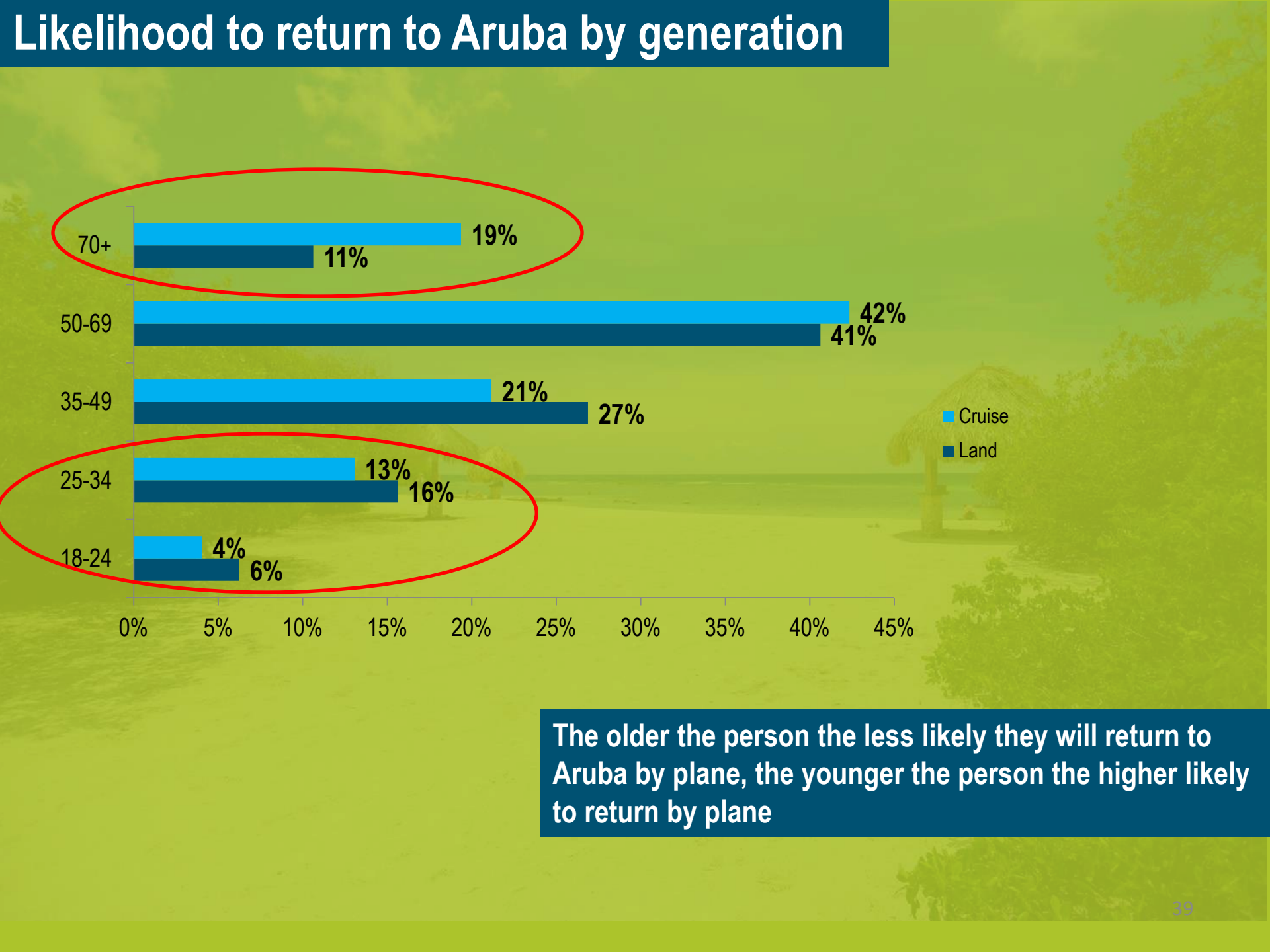


Especially, the younger generation scored Aruba low on these aspects

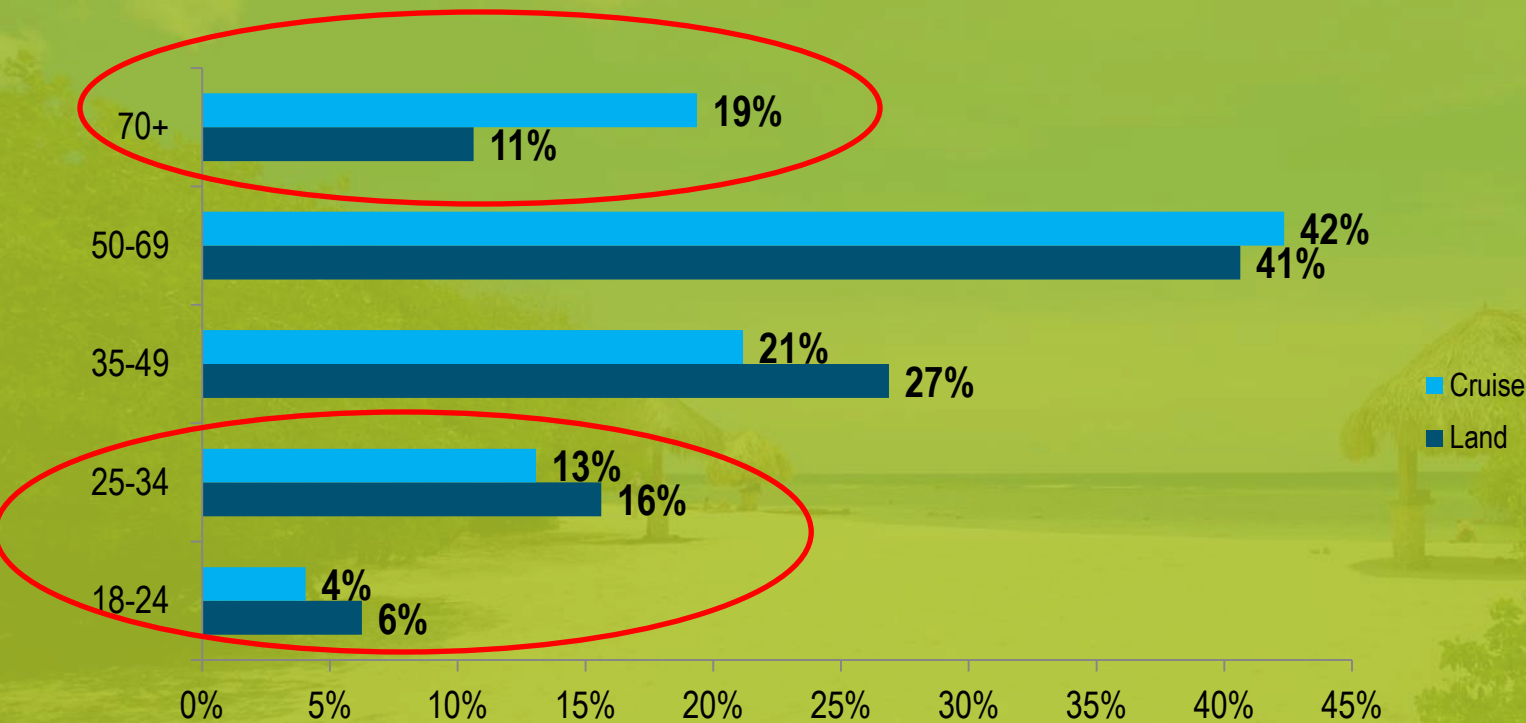
# Likelihood to return to Aruba

- 63% of the respondents are very likely to recommend Aruba to others
- 48% of the respondents are very likely to return to Aruba on another cruise
- 35% of respondents are very likely to return to Aruba as land-based visitor (conversion)
- Thus, 48% of the respondents are very likely to return to Aruba, but not as land-based visitor

**“Higher  
likelihood to  
return as Cruise  
visitor”**



# Likelihood to return to Aruba by generation



The older the person the less likely they will return to Aruba by plane, the younger the person the higher likely to return by plane

# Key Insights

- 68% of land based visitor are very likely to return to Aruba
- 35% of cruise visitor are very likely to return as land based
- The younger generation are more likely to return as land based visitor





# Conclusion

- The main motivation to take a cruise is to see multiple destinations, and unpack only once (37%).
- 66% of the respondents indicated that “Aruba” as destination stop was their main motivation to choose the cruise.
- The main source of information is Friends and Family (36%).
- On average a person spend USD 2041 per cruise package (including airfare).
- The top three spending categories (in terms of volume) are F&B (outside ship) (45.22%), souvenirs (44.78%), and shopping (33.22%).
- The average cruise visitor per person spends \$ 121.73 (including pre-paid tours), while the cruise visitor spend about \$ 243.47 (including pre-paid tours) per party while in Aruba
- From the above-mentioned budget, the highest spend (in terms of amount) are spend on shopping (26%), jewelry (24%), pre-paid tours (12%) and F&B (9%).
- The top reason for shopping in Aruba is the price of goods (49.13%).

# Conclusion

- In the last 14 yrs. the cruise spending has grown by 9% (2002) vs. (2016) this includes on-board excursions. However, the cruise spending (excluding on-board excursions) have dropped by 4% vs. 2015.
- The cruise line that brings the highest income passengers are Carnival followed by Royal Caribbean.
- 45% of passengers from Carnival have a HH of \$100K and over, and 40% of passengers of Royal Caribbean have a HH of \$100K and over.
- The passengers (per person) from Carnival spend the most when on island on average \$212, this is followed by Royal Caribbean \$184.

# Conclusion

- Friendliness of locals, beaches and safety were the top three best rated aspects of Aruba.
- Range of food available, excursions and range of shopping available were rated the lowest of Aruba.
- The majority of participants (50%) indicate that a “Map along with recommendations” is the most helpful tool to allow them to maximize their time on island.
- 53% of respondents seek to be free to roam the island on their own, 47% seek to visit the beach and 34% indicated that access to Wi-Fi are their top three favored activities when visiting Aruba during limited time.
- The majority of respondents seek better information about most popular restaurant, self-guided tours, local activities and place you need to shop
- 48% of respondents are very likely to come back to Aruba as cruise visitors. The younger cruise victors are more likely to come back to Aruba as land visitors.

# Conclusion



- Aruba on the itinerary influences the visitors decision to come
- Aruba is friendliest place on earth, the best among other islands
- Better information is needed on ship or at the port about Aruba about where to eat, local activities and self guided tours
- Wi-Fi access is requested
- Better range of food option, shopping and excursions are requested
- The young cruise visitor are more likely to come as land based visitor
- Cruise visitor has been spending more or less the same amount in the last 14 yrs.
- Nonetheless, a drop by 4% is seen in 2016 vs. 2016 when comparing spend (excluding on board purchased excursions)



# Travel Habits

- Convenience and see multiple destination are the main motivation for cruise
- Specific destination can be a main motivation for cruise. Such as 66% of respondents indicated that Aruba is their main purpose for taking the cruise.
- If a specific destinations is not the main contributor for taking a cruise, an event such as family trip, honeymoon, and anniversary is the largest contributor.
- Main source of information is friends and family
- It cost \$2041 per person to take a cruise package (11+ nights)

