

# Value for Money Reputation Analysis



Aruba Tourism  
Authority



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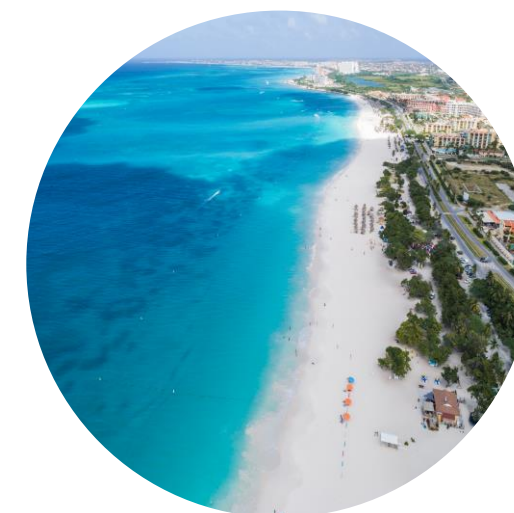
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# Setting the Consumer Context

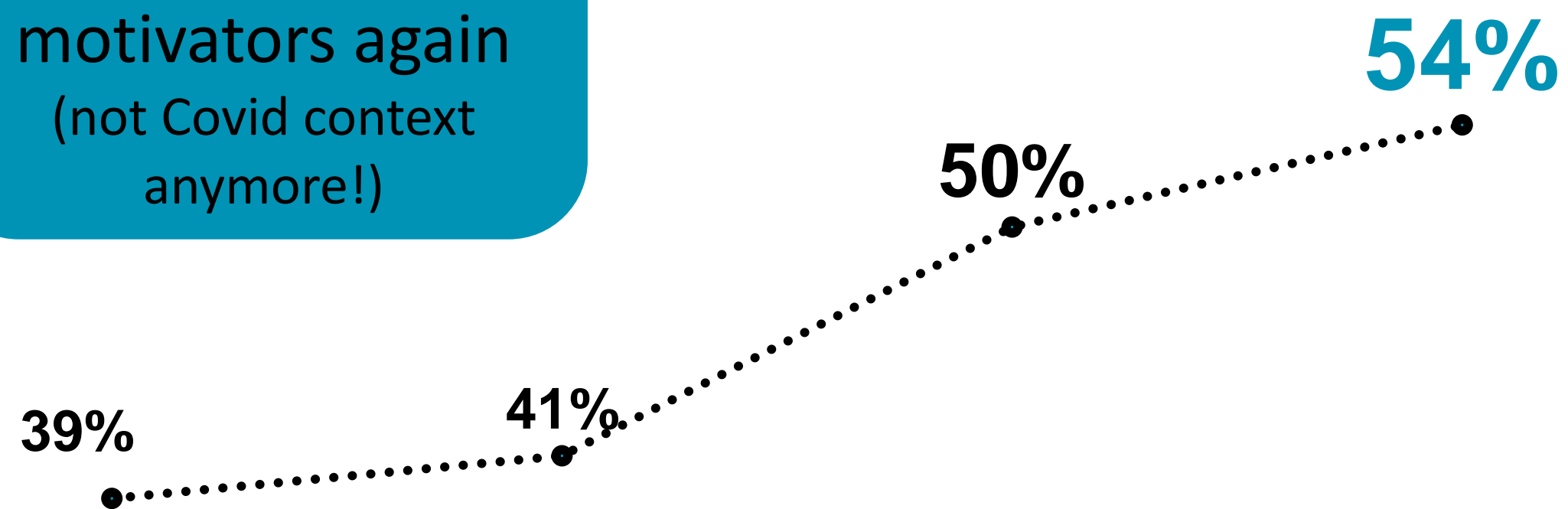


# Int'l Travel Desire skyrocketing...



**Attractive deals**

**#1** travel  
motivators again  
(not Covid context  
anymore!)



*Will certainly travel internationally in the next 12 months*

December 20

March 21

August 21

April 22

Source: TCI/VisitBritain, Visit London & Partners – 20 markets, 11 000+ interviews

## ...Travel complexity too



*Covid, Geopolitics, Inflation, Climate threats, Travel chaos, Labor shortage, Restricted experiences, Hostile Communities...*

INTERNATIONAL TRAVEL RESUMPTION UNDER  
UNPRECEDENTED PRESSURE FROM EXTERNAL FACTORS  
IMPACTING VISITOR PRESSURE  
AROUND VALUE FOR MONEY

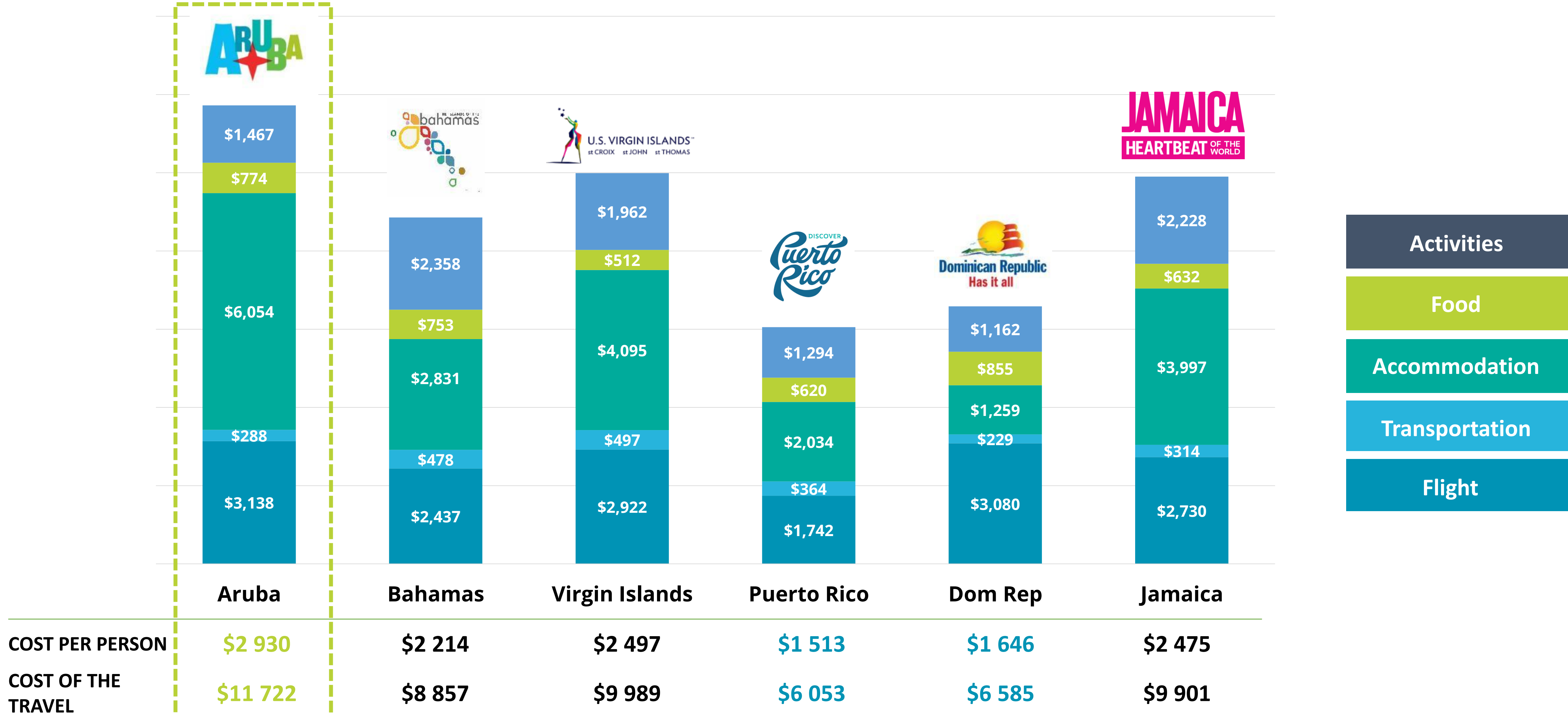
**LOWER TOLERANCE LIMITS / HIGHER EXPECTATIONS!**



# ARUBA IS FACTUALLY EXPENSIVE

Example: the "Families" Pricing Test scenario

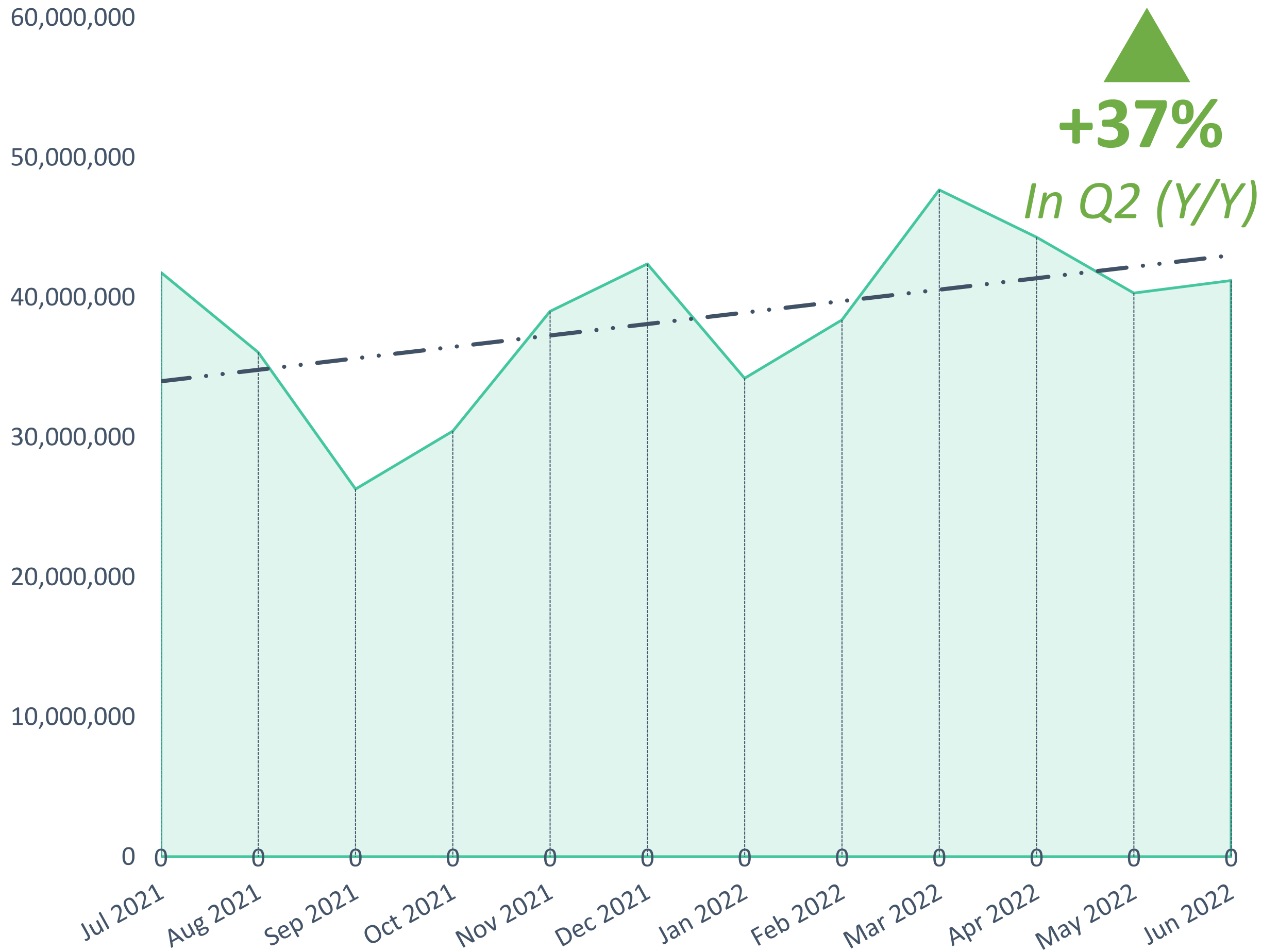
- 2 places vs 2018



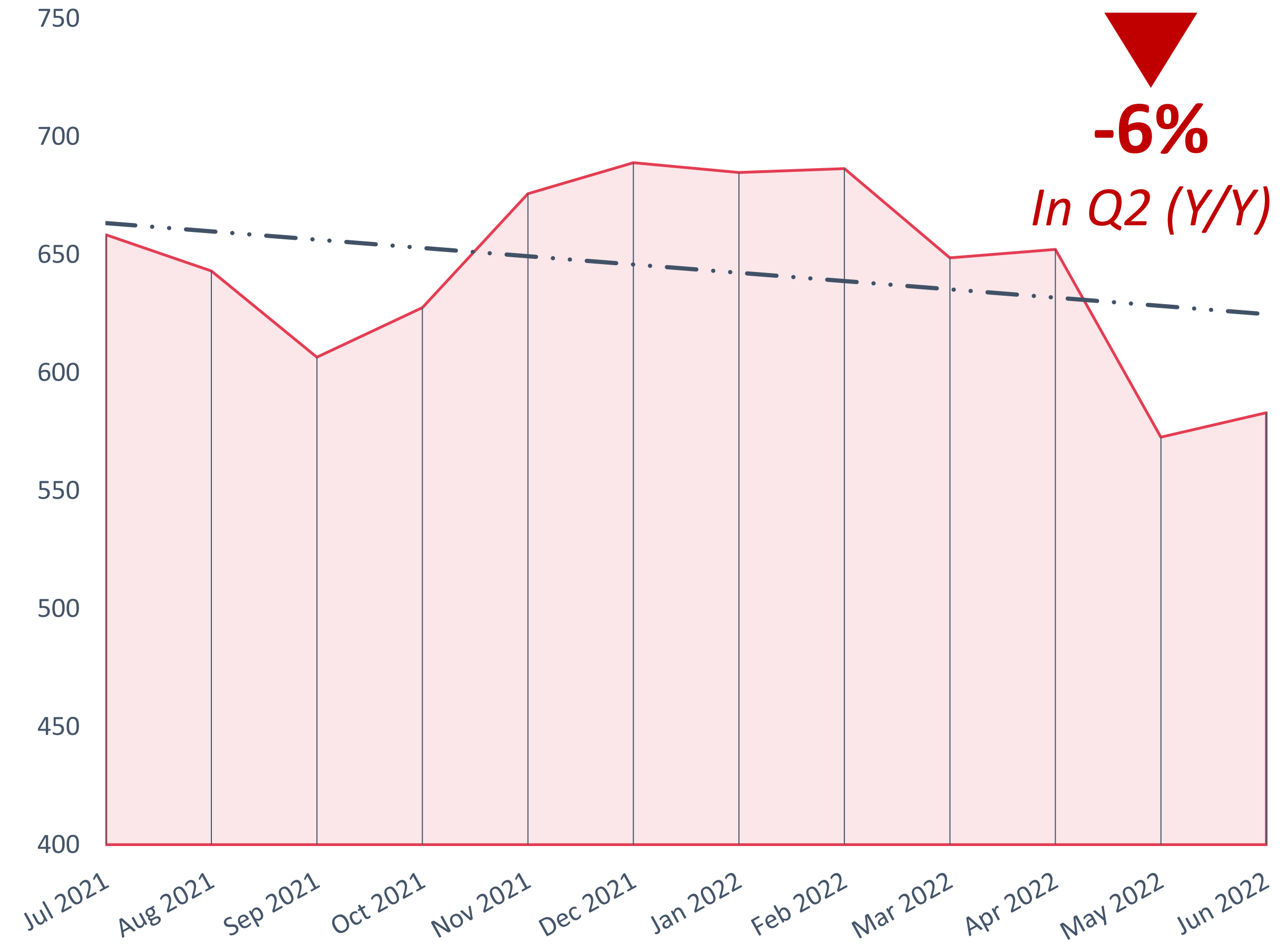
# TOTAL SPEND VOLUME RECOVERS BUT AVG SPEND PER VISITORS DECREASES

In association with *Visa Destination Insights*

### TOTAL VISA SPEND VOLUME (\$US)



### AVG SPEND PER CARDHOLDER (US\$)



03

# The Value for Money Reputation



60,000+ social posts and articles from media, blogs, forums, and social channels



280,000+ rating & reviews from 25 sources  
350+ POIs on Aruba monitored

Accommodation – Restaurants – Attractions – Shopping – Activities - Transportation



# KEY PERFORMANCE INDICATORS



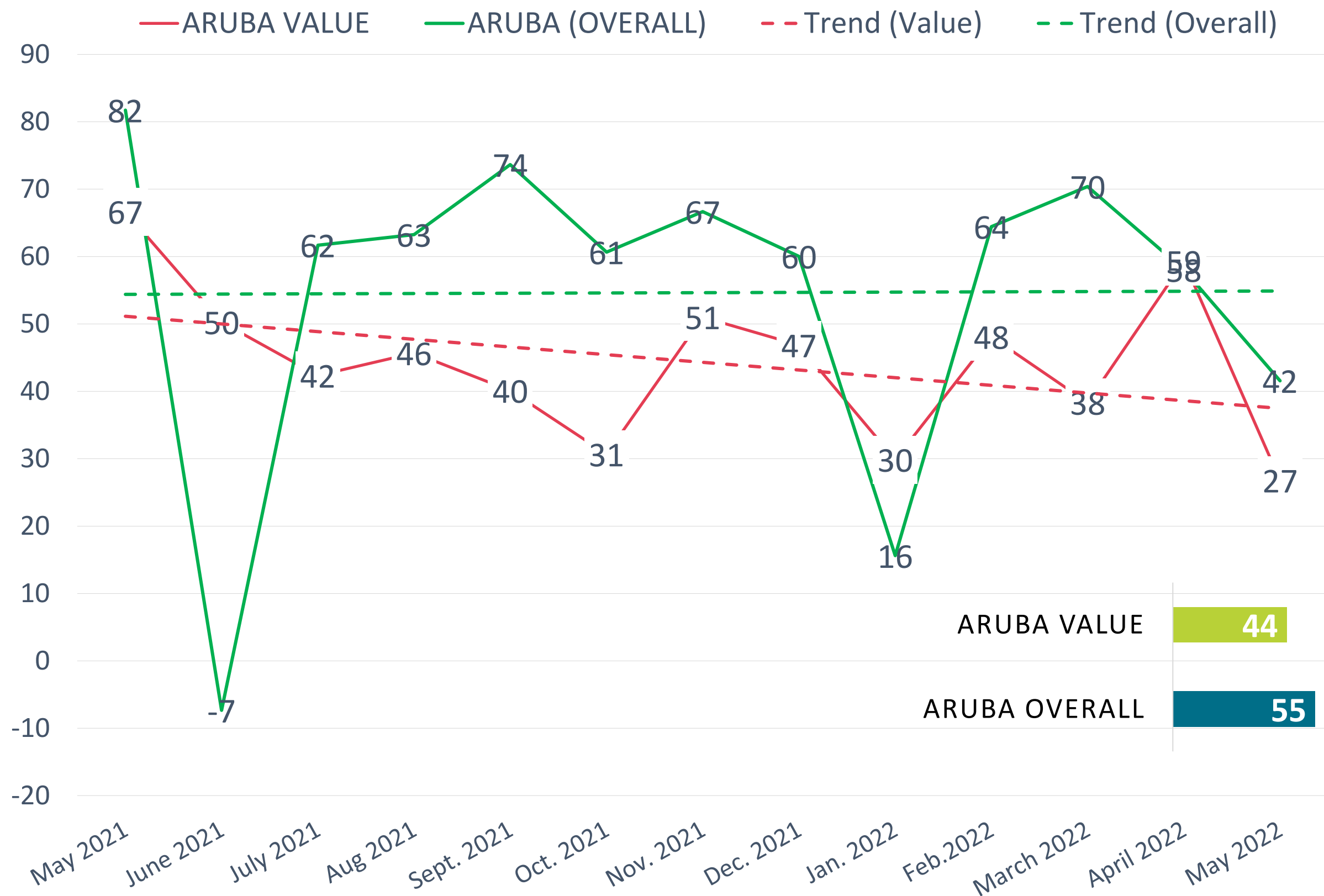


# A growing focus around Value in social conversations

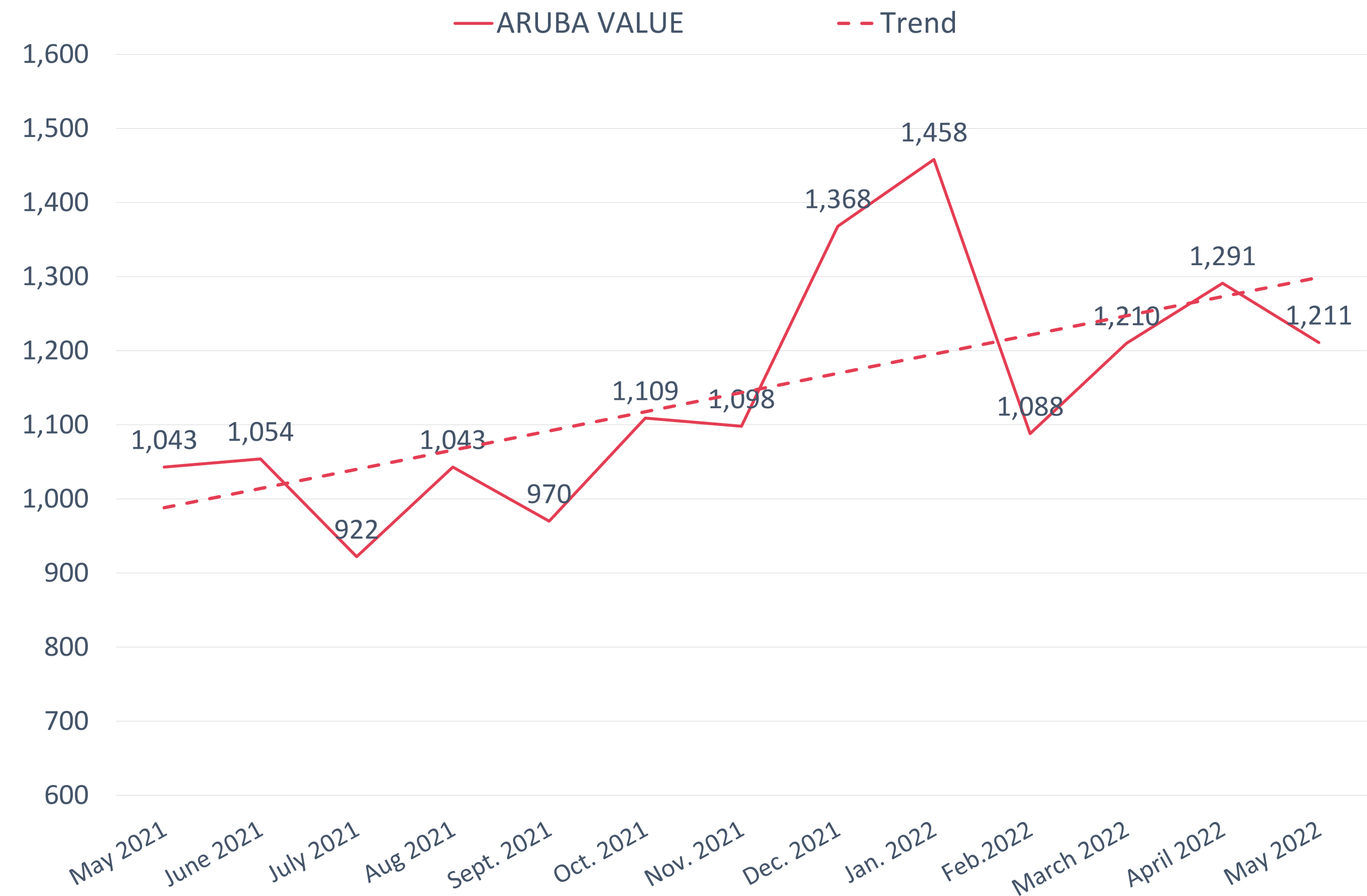


*Volume and polarity of web social conversations in relation to Aruba prices, costs, value, affordability and other cost-related aspects associated to the destination in a context of travel and tourism.*

### SOCIAL NET SENTIMENT SCORE (%positive - %negative)



### SOCIAL CONVERSATIONS - VOLUMES

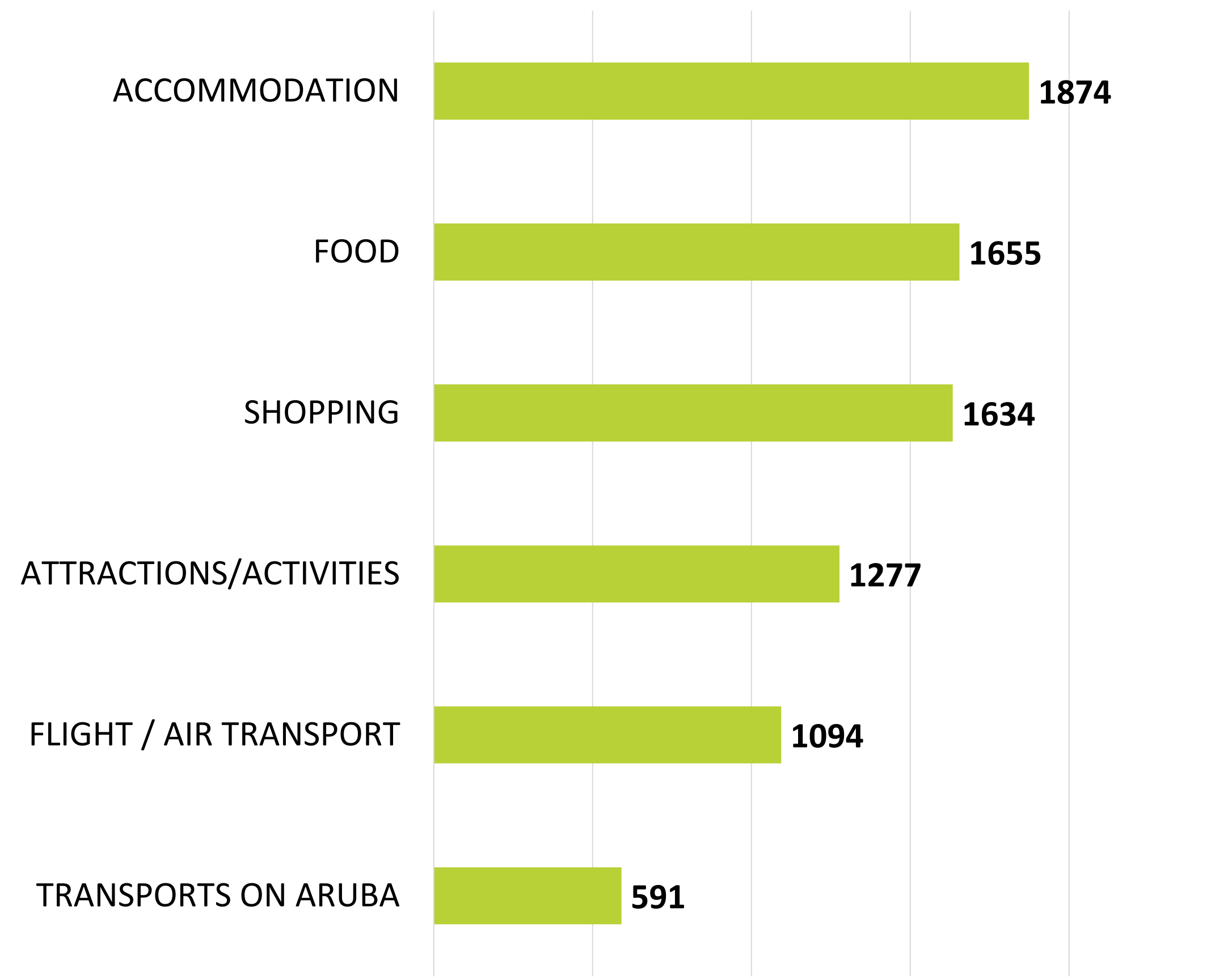


# Themes concern all tourism facets

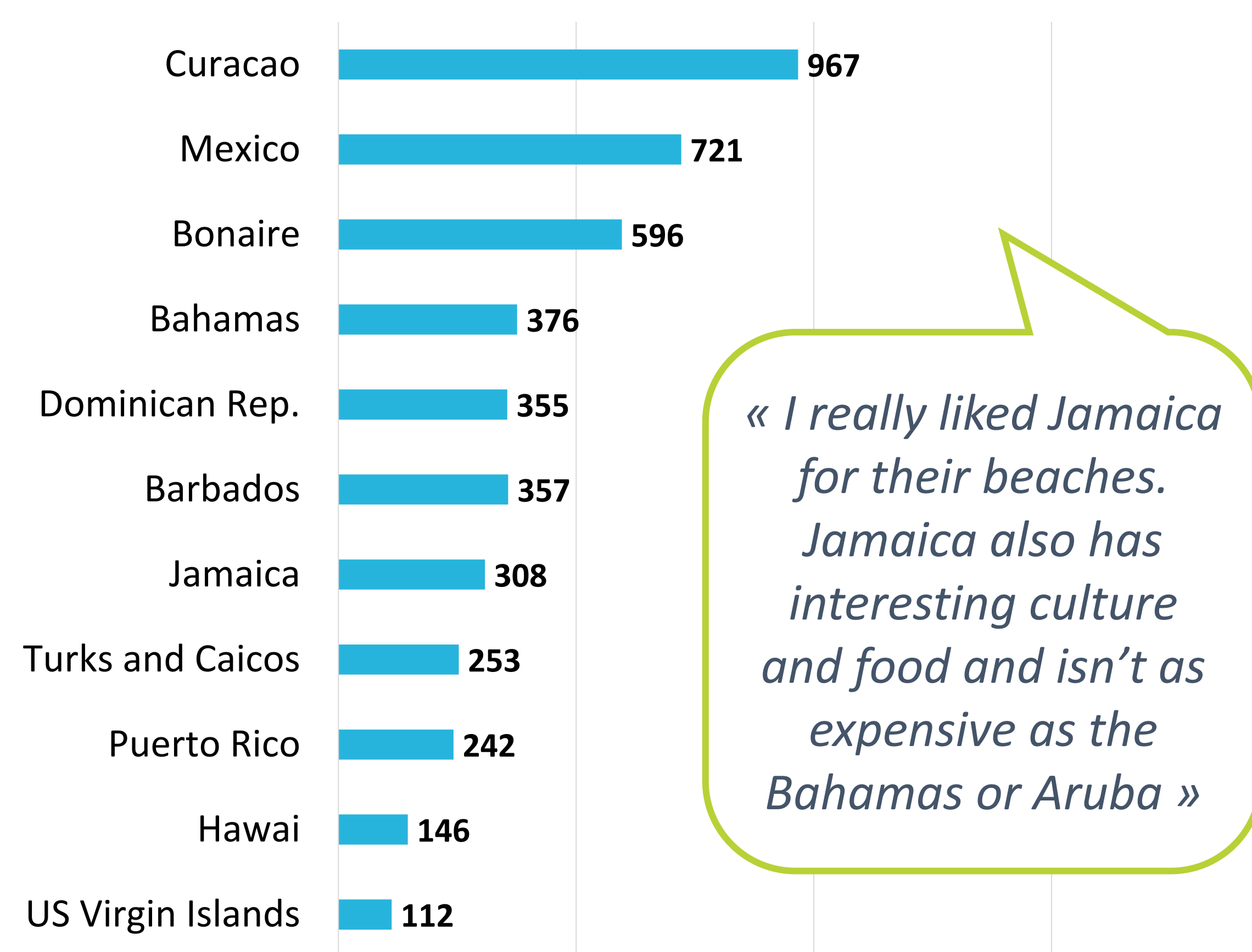
And often comparisons vs competition



## KEY THEMES INVOLVED IN SOCIAL POSTS AND ARTICLES



## POSTS MENTIONING ARUBA ALSO MENTION...

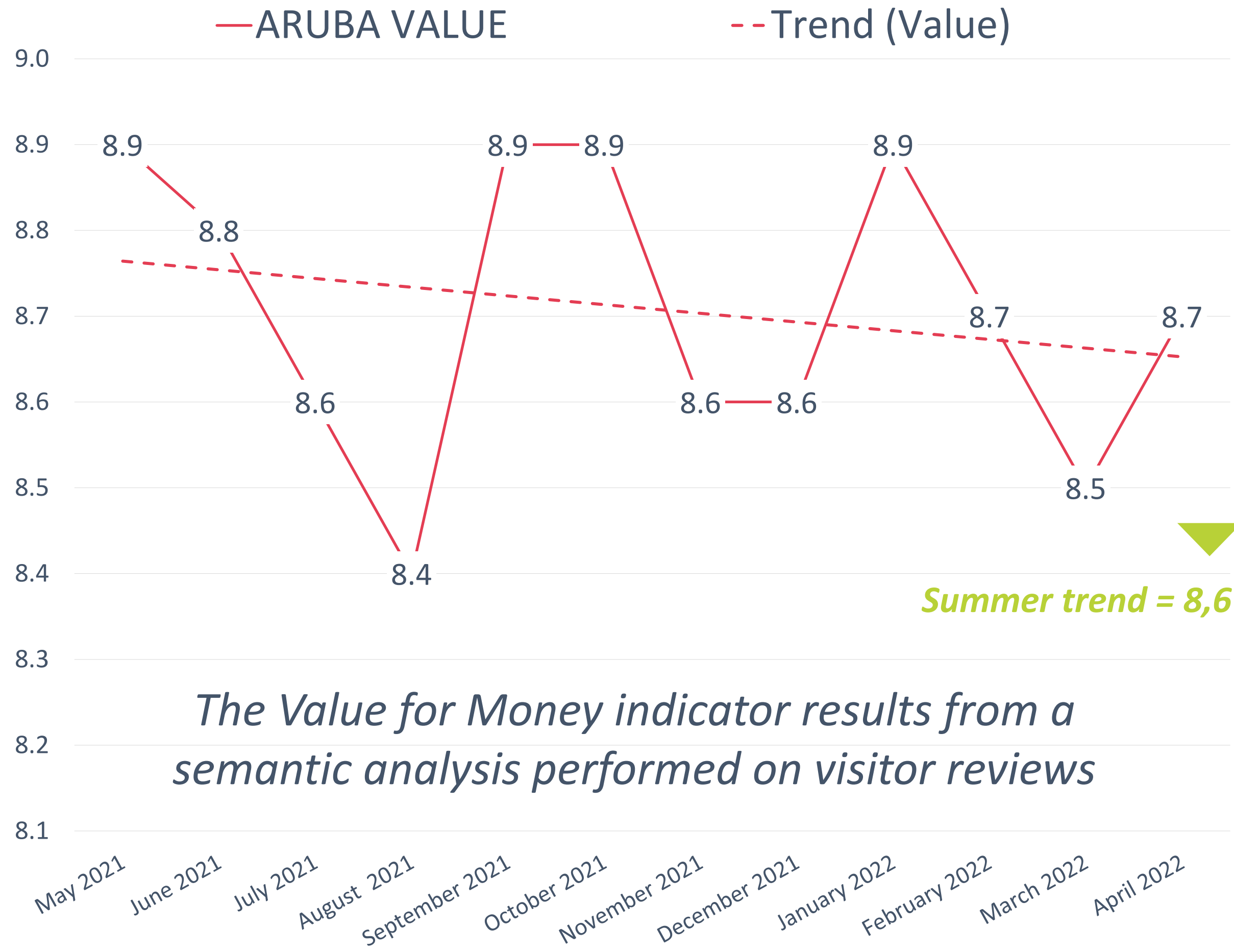


*« I really liked Jamaica for their beaches. Jamaica also has interesting culture and food and isn't as expensive as the Bahamas or Aruba »*

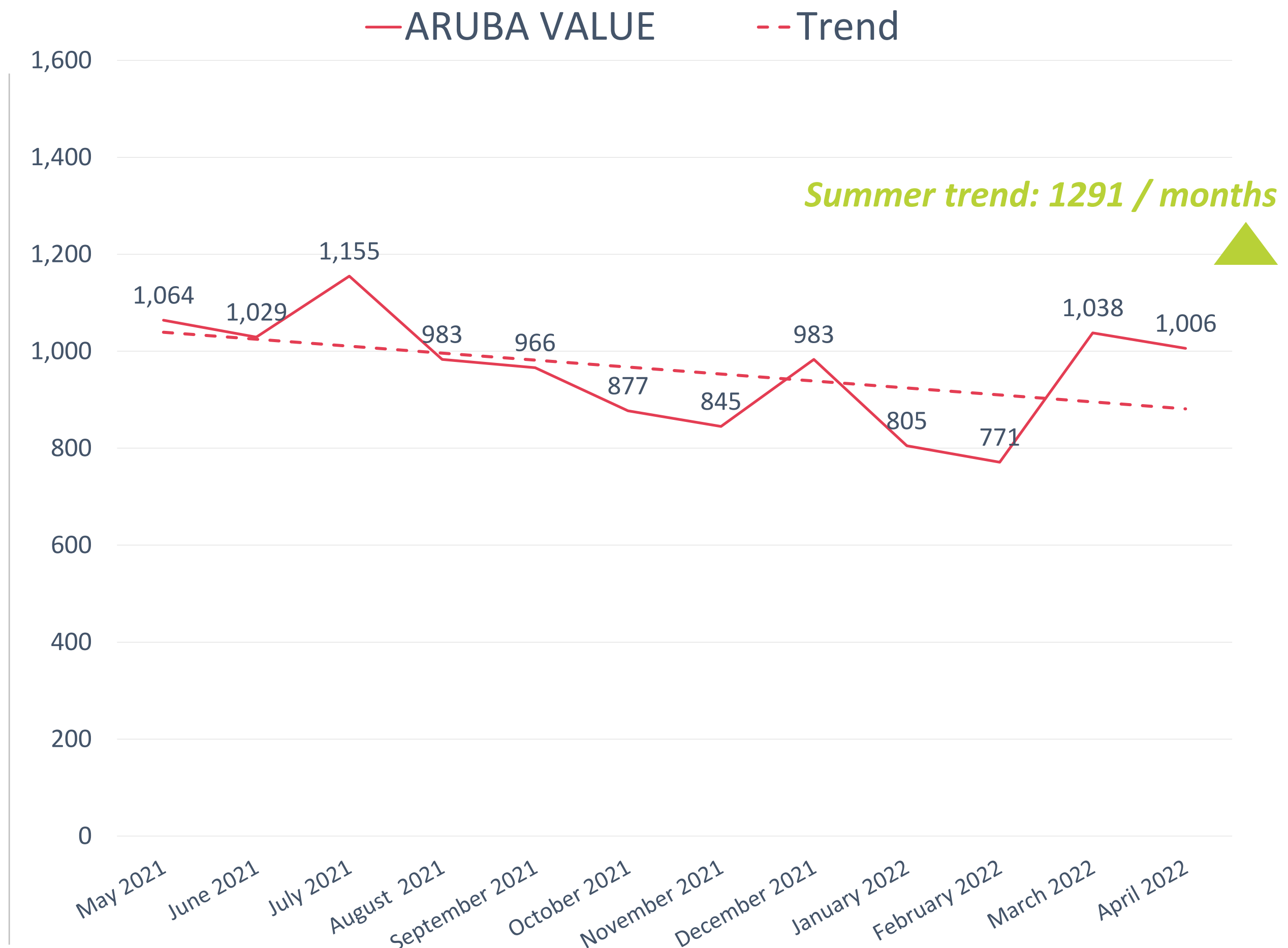
# Visitor Opinions on Value for Money get volatile



## VISITOR SENTIMENT – VALUE FOR MONEY



## VALUE FOR MONEY REVIEWS VOLUMES

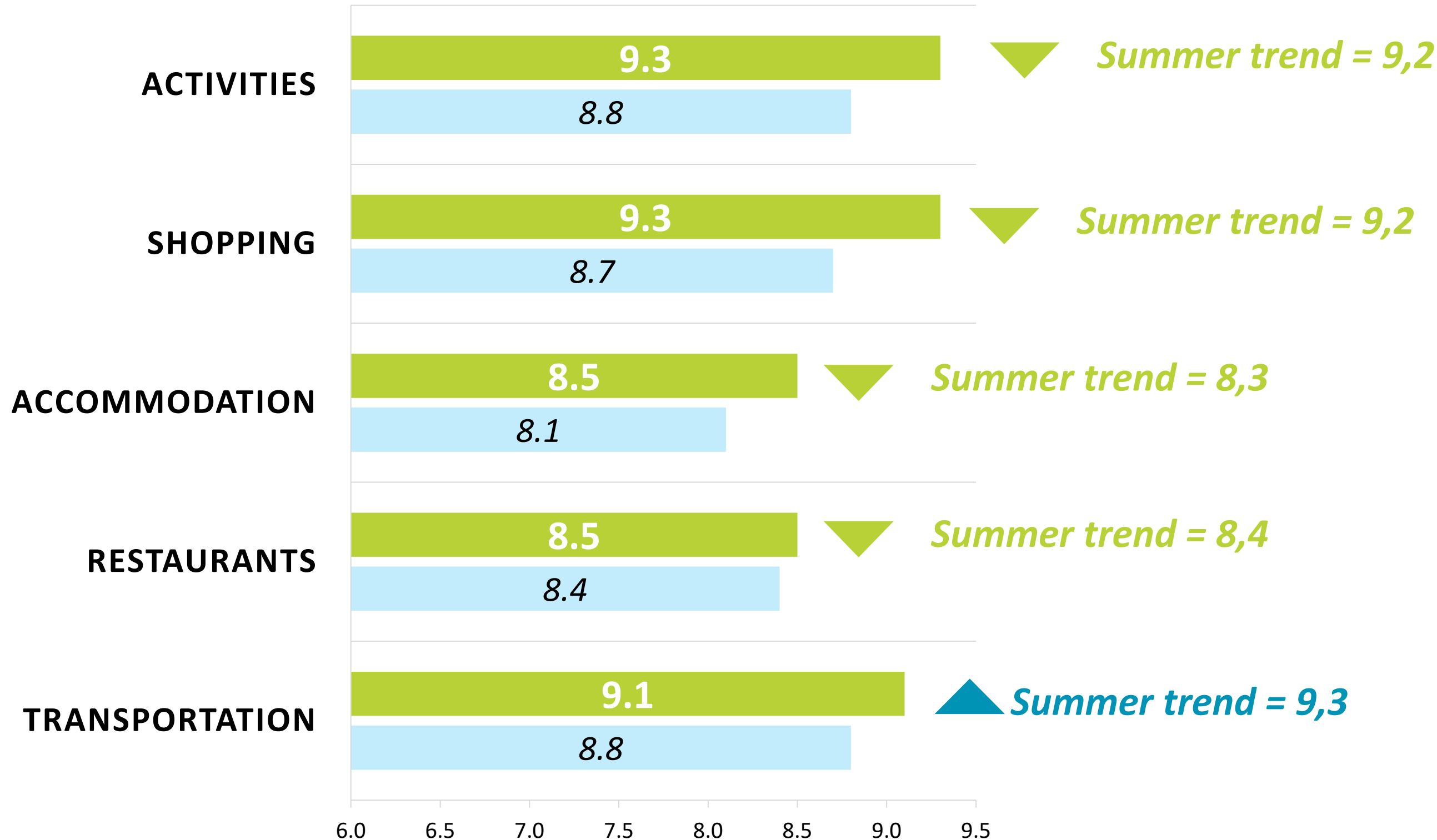


# Aruba value for money still competitive ... For how long?

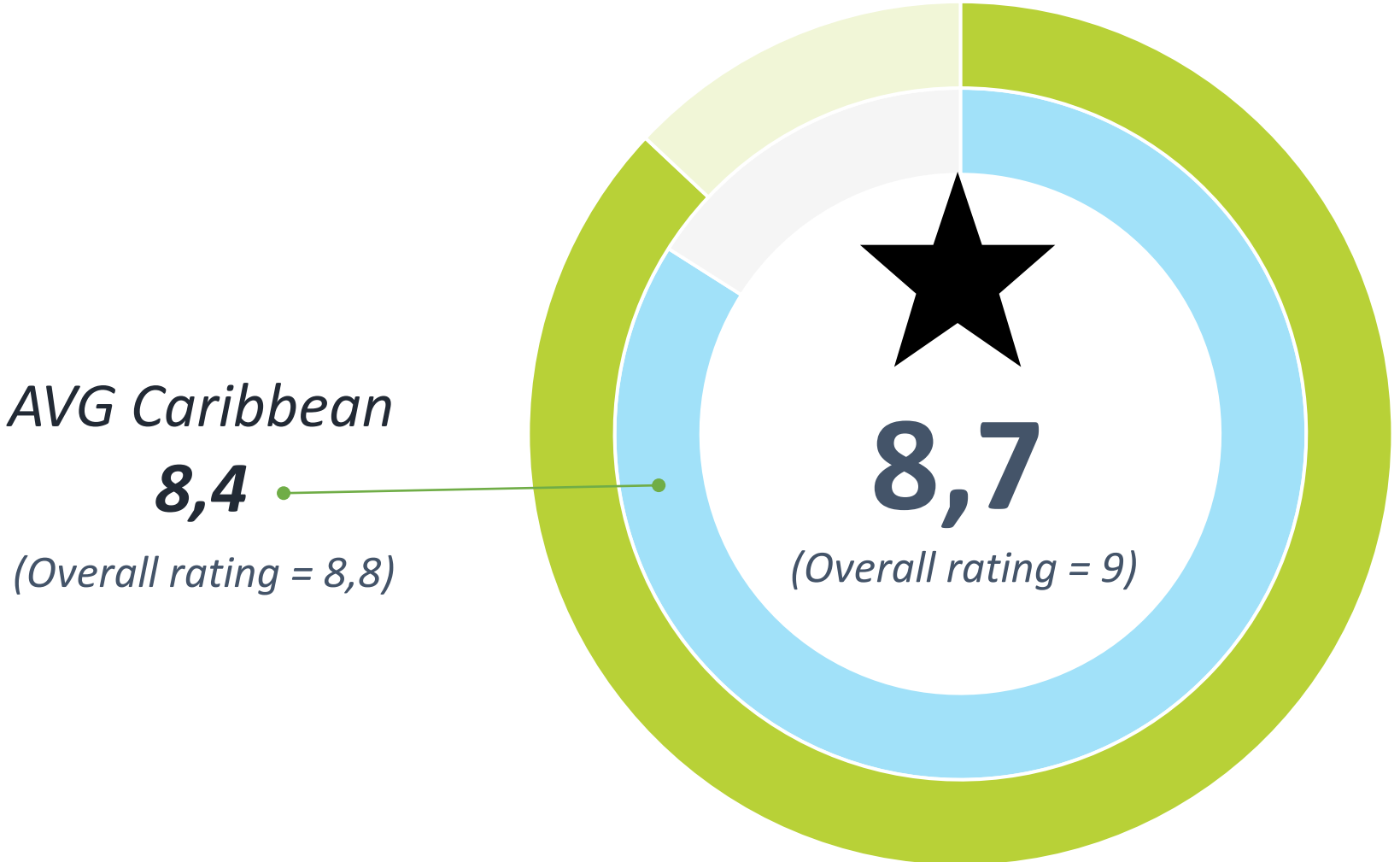


## Value for money Sentiment

■ ARUBA ■ AVG Caribbean



## Value for money Sentiment (All Experiences)

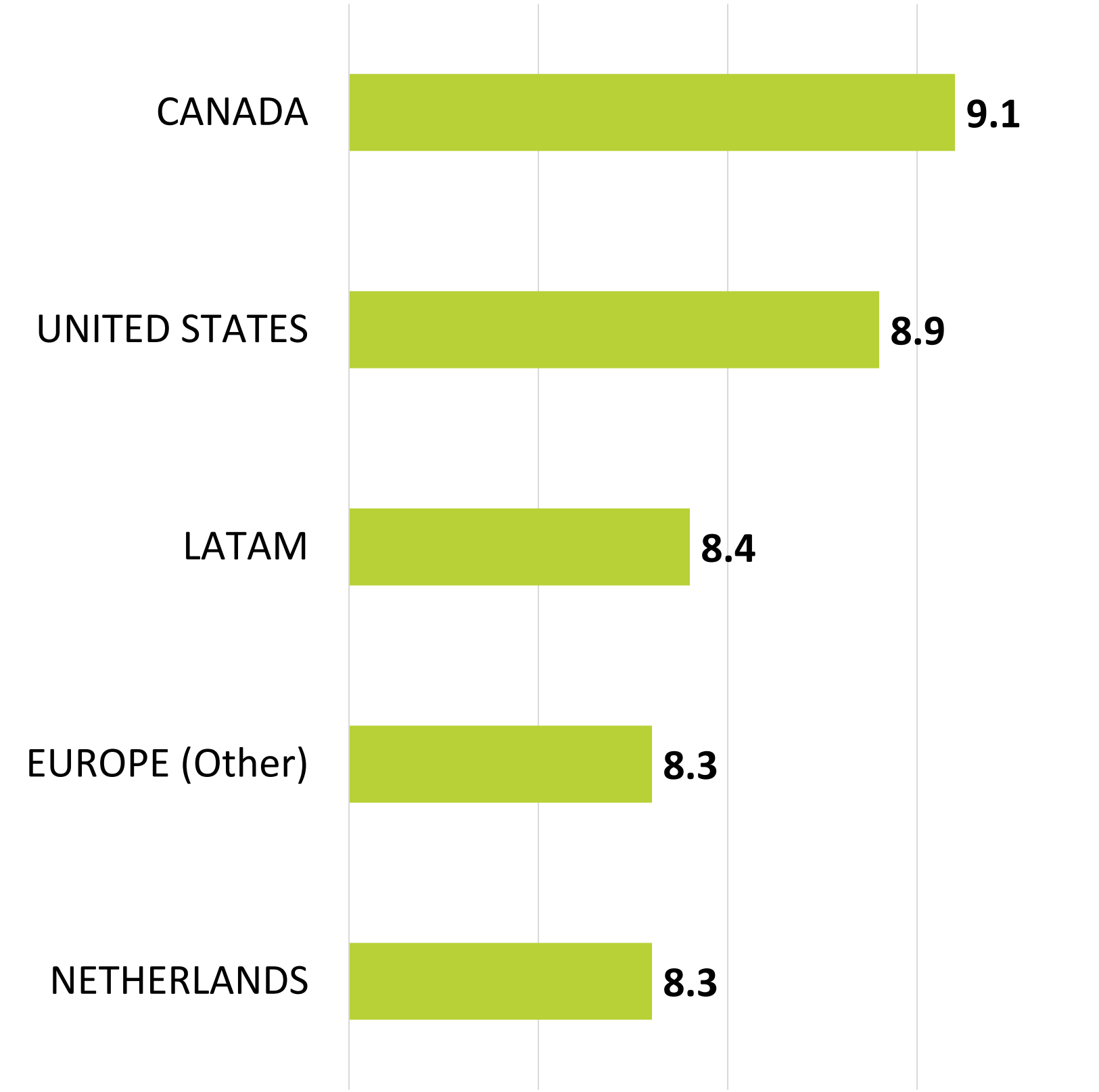


(\*) Jamaica, Haiti, Trinidad & Tobago, Cuba, Guadeloupe, Martinique, Curacao, Saint Vincent & the Grenadines, Barbados, Puerto Rico, Antigua & Barbuda, Bermuda, St Kitts & Nevis, Saint Lucia, Grenada, Saint Barthelemy, Aruba, Cayman Islands, Dominica, Bonaire, Bahamas, Sint Maarten, Saint Martin, British Virgin Islands, US Virgin Islands, Anguilla, Montserrat

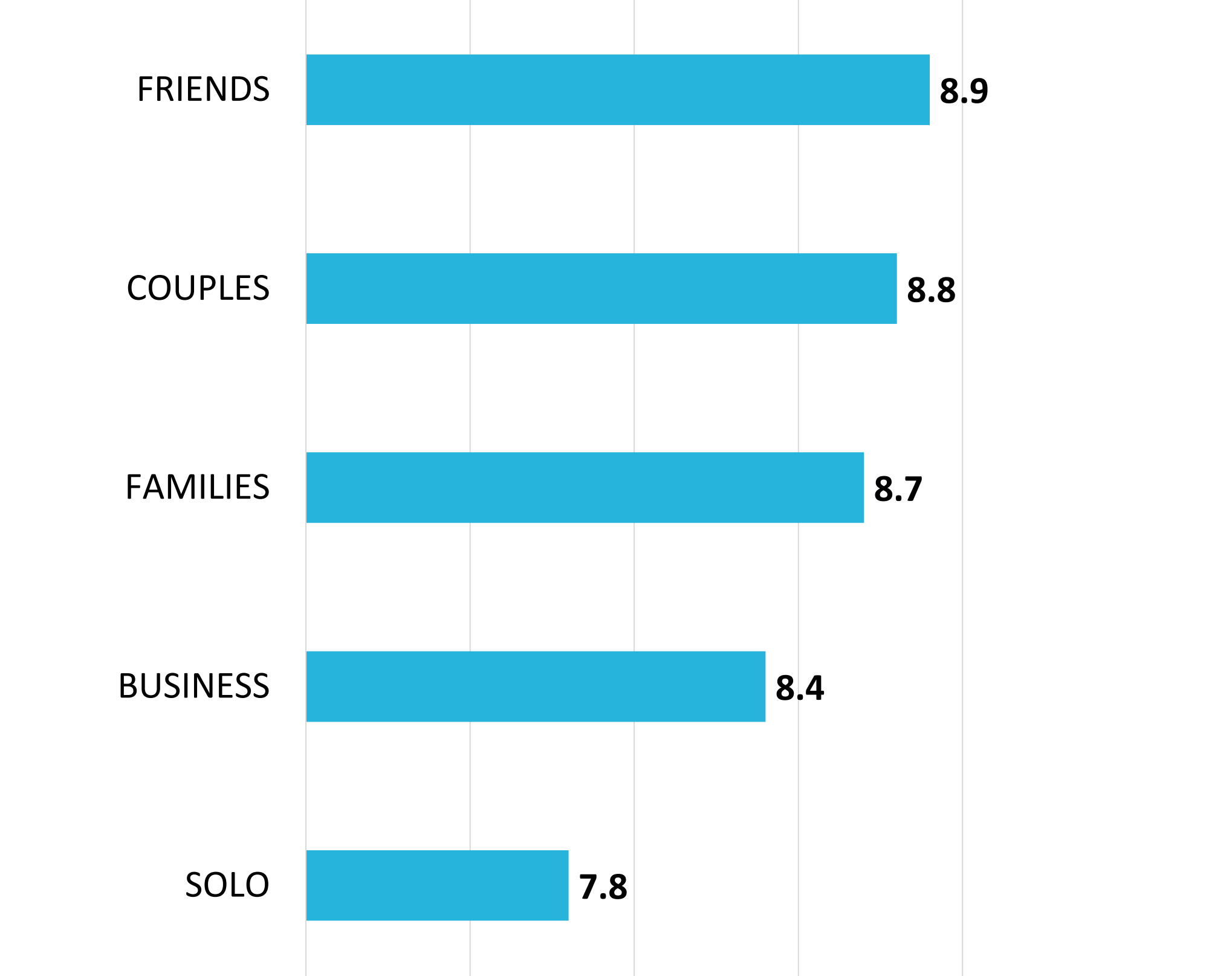
# Increasing value perception consistency across segments



### Value for money Sentiment per Markets



### Value for money Sentiment per Travel Composition



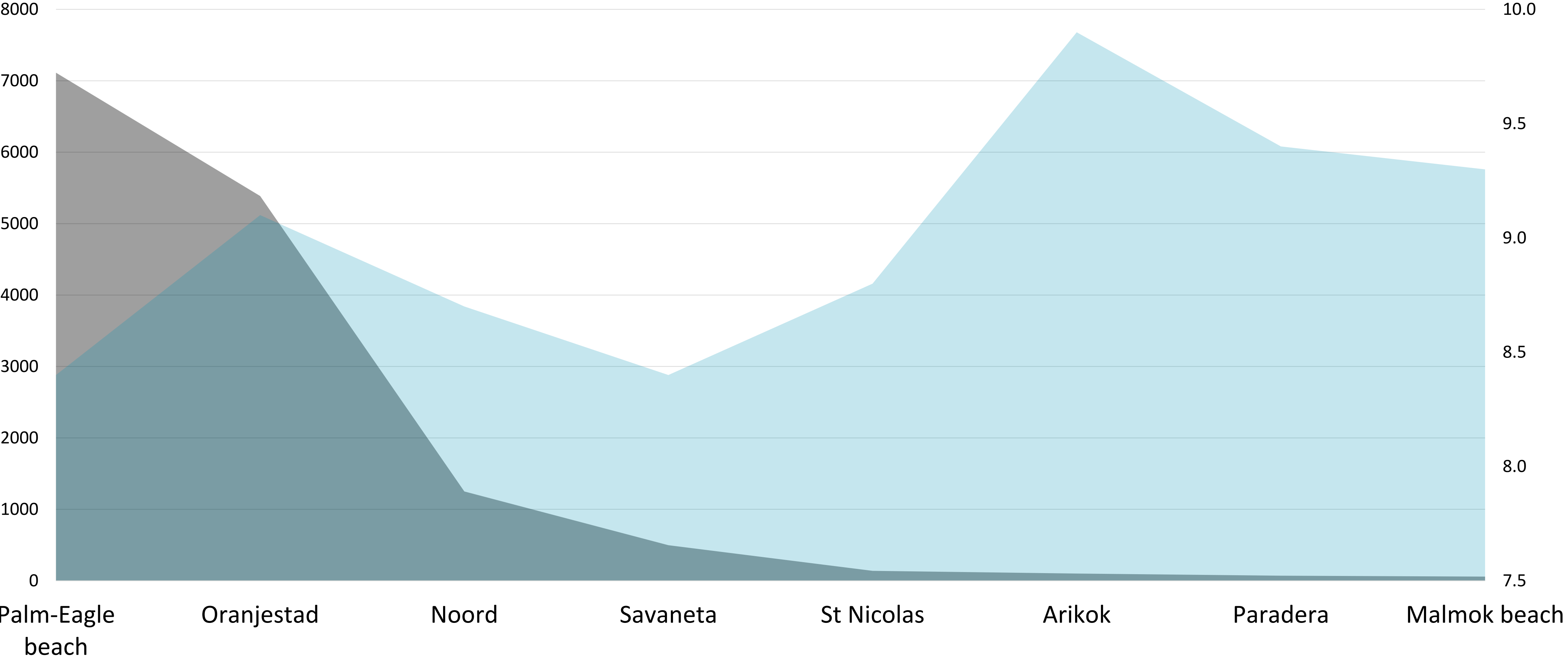
The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

# Increasing value perception consistency within the destination



## Value for money Sentiment

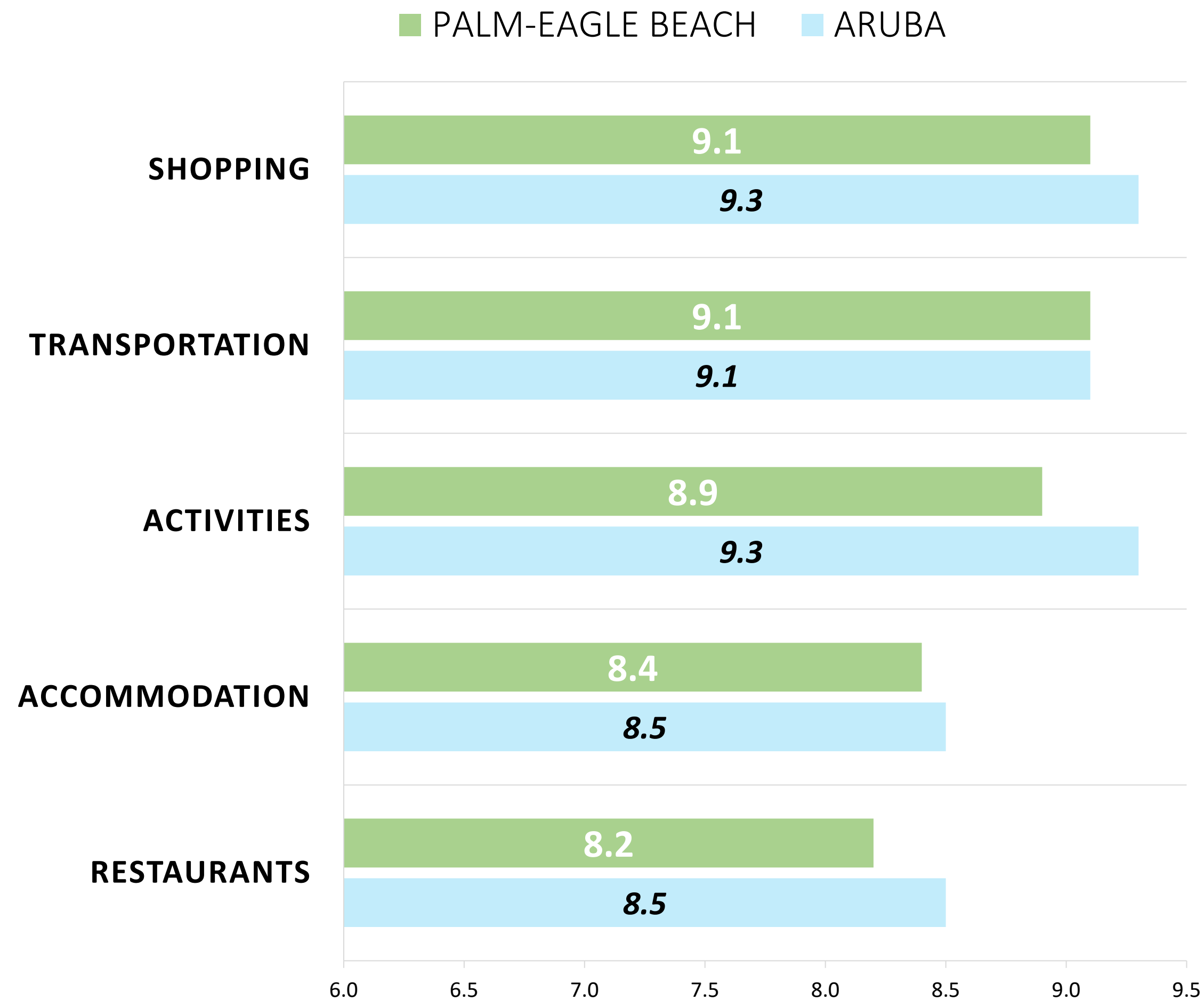
■ Opinion volume   ■ Sentiment score



Period – May 2021 / April 2022

# Focus on Palm / Eagle Beach

What explains the gap in sentiment?

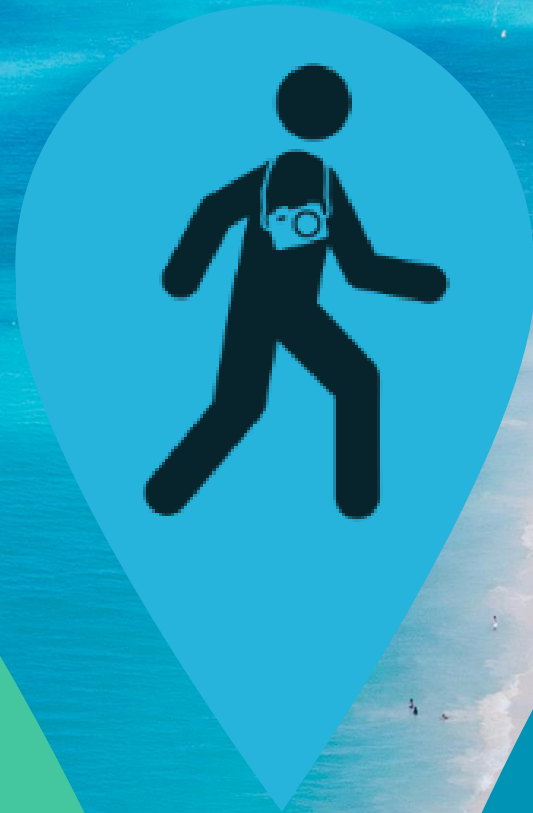


Sentiment Rating ( <i>all verticals</i> )	PALM-EAGLE BEACH	AVG ARUBA
Sanitary_safety	5,9	5,8
Covid	6,1	6,0
Orders in restaurants	6,6	6,8
<b>Sound, noise</b>	<b>6,8</b>	<b>7,5</b>
Bathroom	7,2	7,3
Checkout	7,3	7,6
<b>Air conditioning</b>	<b>7,4</b>	<b>8,3</b>
<b>Value for money</b>	<b>8,4</b>	<b>8,7</b>
Hygiene	8,4	8,6

The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

03

# Focus per Vertical





03

# Focus per Vertical





# ACCOMMODATION



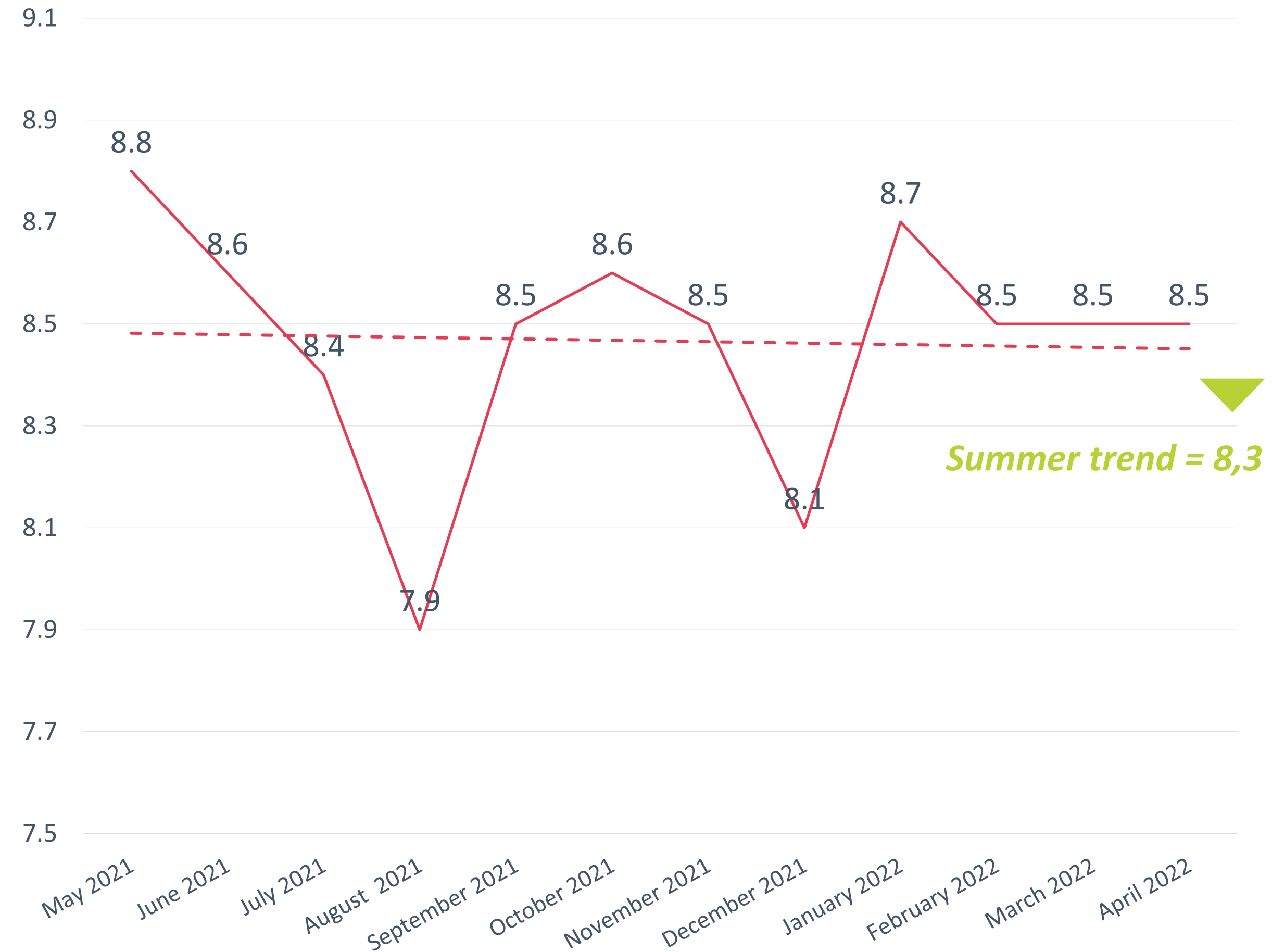
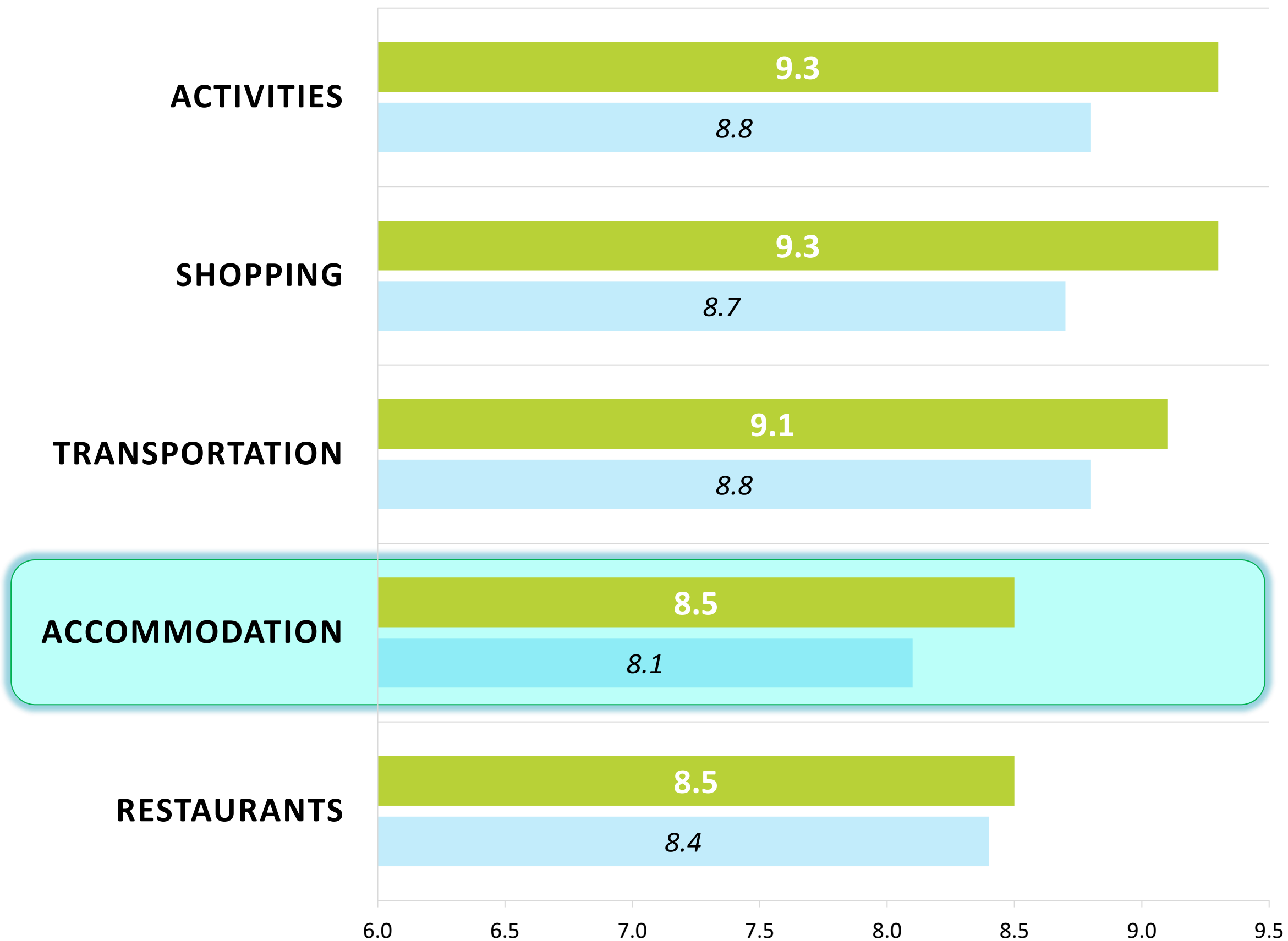


# Positive and competitive ratings overall

But recent trended data suggest a downward trend



ARUBA AVG Caribbean



The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

Period – May 2021 / April 2022

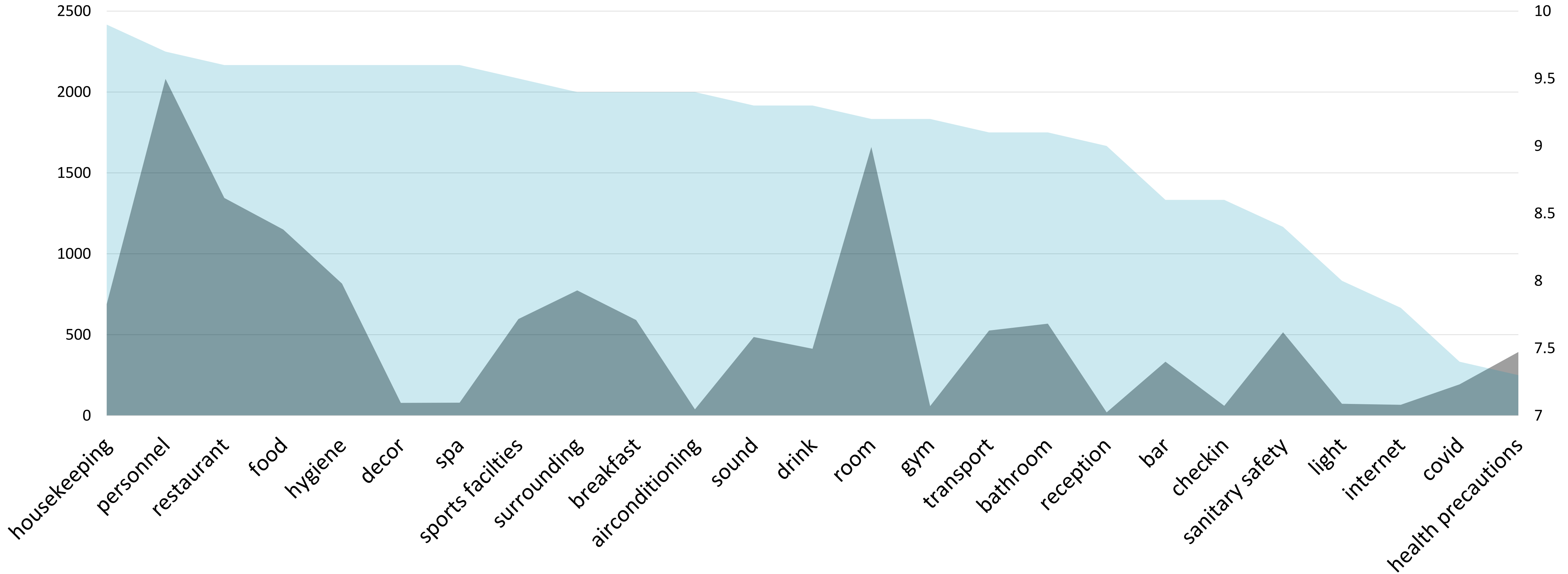


# Drivers of Positive Value - Accommodation

Which topics are the most frequent and positive in reviews?



■ Opinion count   ■ Sentiment score



Period – May 2021 / April 2022

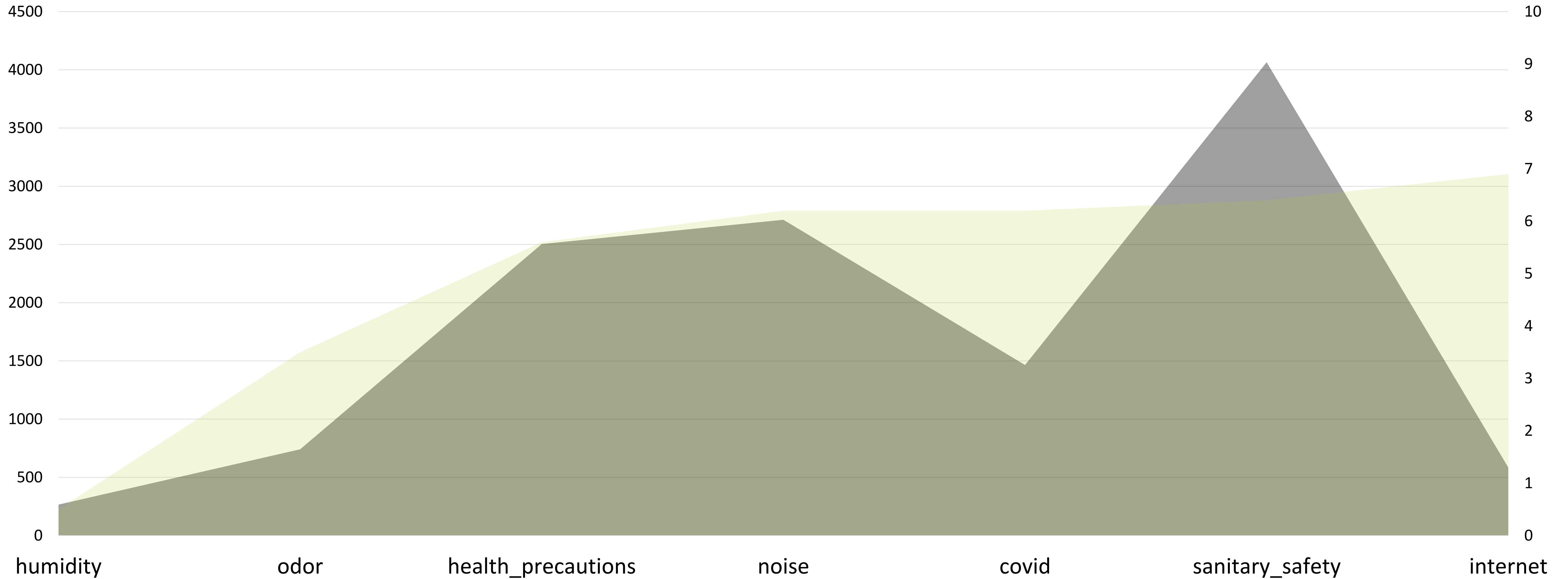


# Drivers of Negative Value - Accommodation



Which topics are the most frequent and negative in reviews?

■ Opinion volume   ■ Sentiment score



Period – May 2021 / April 2022



# Summarizing Key Drivers & Barriers of Accommodation Value



## VALUE DRIVERS TO COMMUNICATE

## VALUE BARRIERS

Families / Couples friendly

Despite cheaper prices, some lodging offer disappointing quality

Options for visitors looking for Aruba lodging “on a budget”

Crowded family hotel decreasing value

Staff attitude, major driver of value

(Covid test and quarantine hotels seen as expensive)

Well maintained facility standards such as sanitary, AC, hot water, room smell...

Rude staff / not providing helpful information / Suspicions of stealing

Beach chair reservation system

Old, downgraded hotels with terrible facilities – Smell issues

Great additional services such as spa, casino, golf club, restaurants

Noise from construction repair, noisy activities of guests at late night

Hedonistic experiences: décor, spa, sound environment

Inaccurate advertisement online / misleading pictures on websites

Extra housekeeping efforts

Lacking safety in surrounding area

Unappropriated booking and refund policies

## OTHER VALUE CONVERSATION TRACKS

Conversations show an obvious **consumer mindset around comparing destinations and adapting to the cost rising context:** tips for “Aruba on a budget”, Pros & cons of all-inclusive, of Hotels vs Airbnb...

**First-time visitors** comparing / asking about different options (resort vs private rentals, all-inclusive deals or not)



# RESTAURANT



Period – May 2021 / April 2022

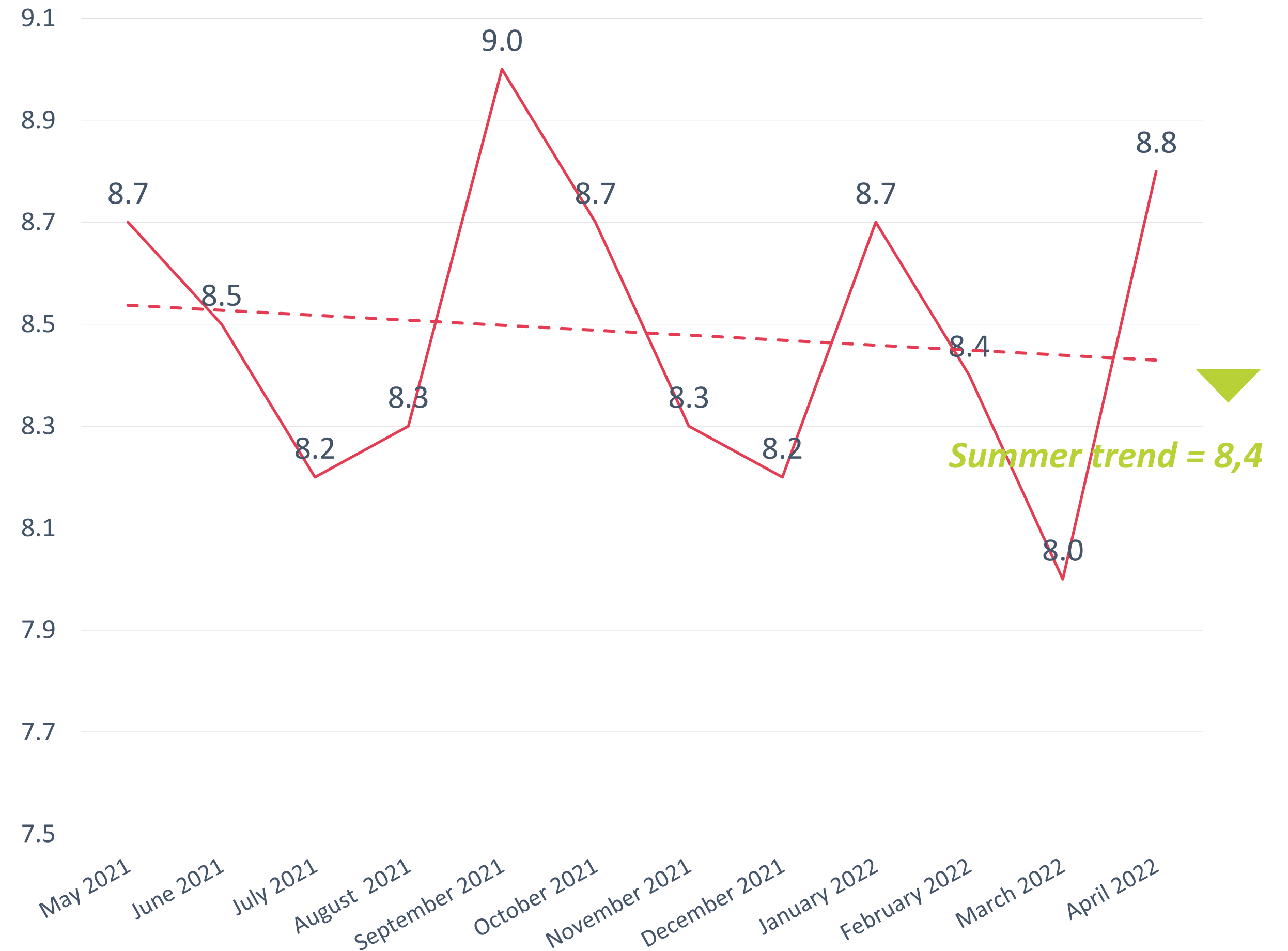
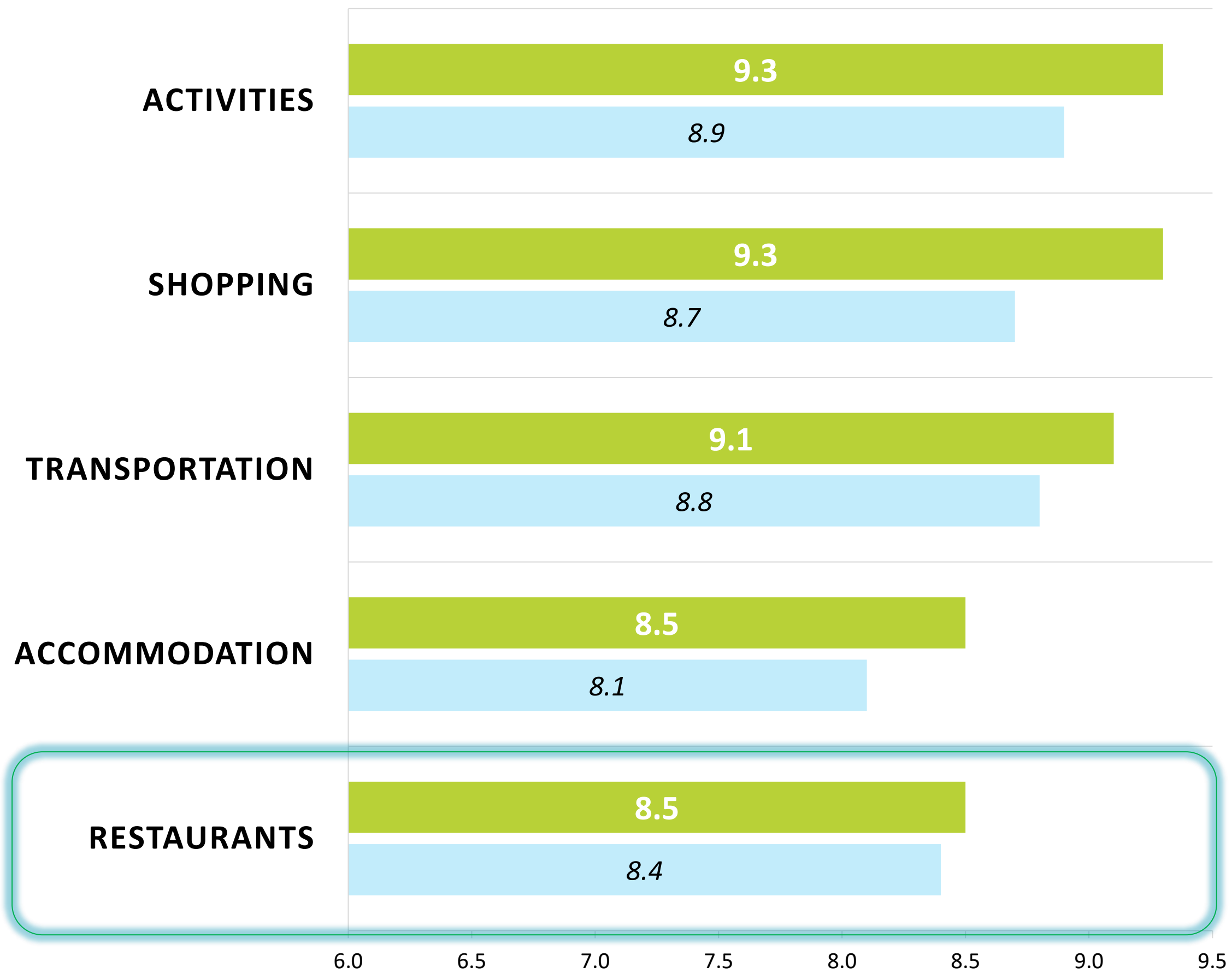


# Positive ratings, but competition matches

While recent trended data also suggest a downward trend



■ ARUBA ■ AVG Caribbean



The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

Period – May 2021 / April 2022



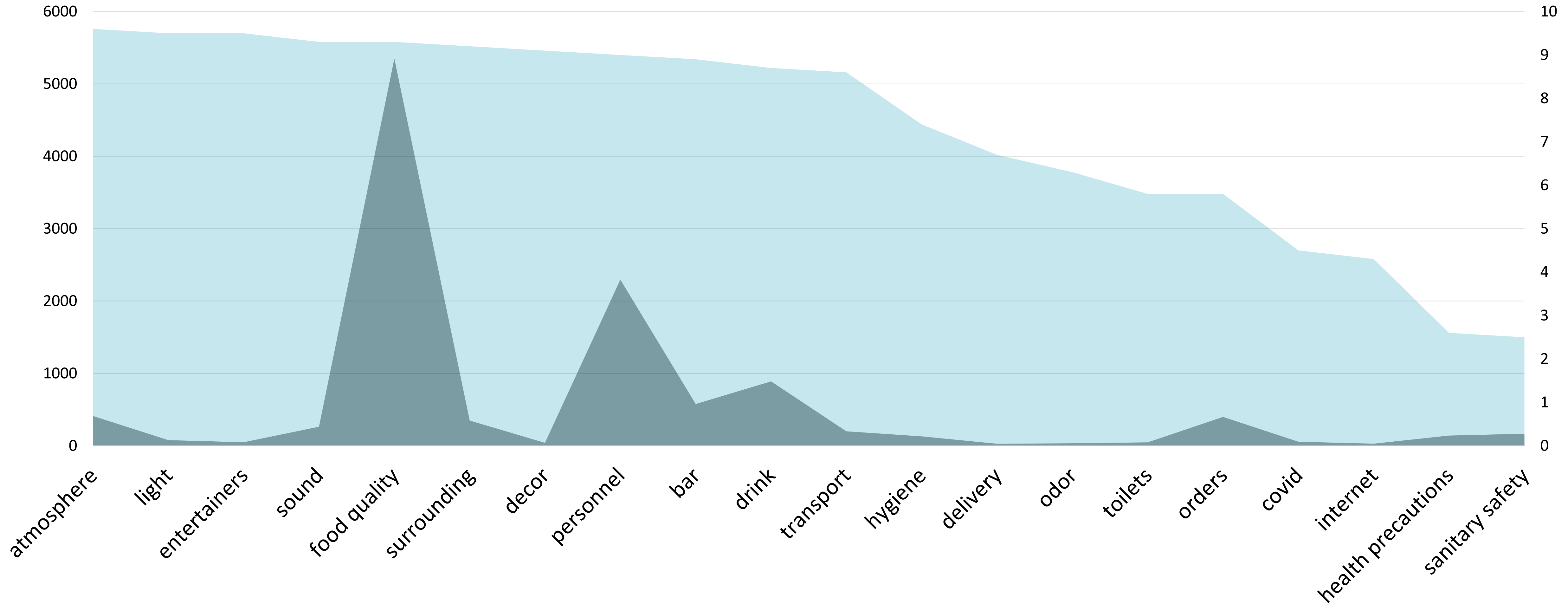


# Drivers of Positive Value – Restaurant

Which topics are the most frequent and positive in reviews?



■ Opinion count   ■ Sentiment score

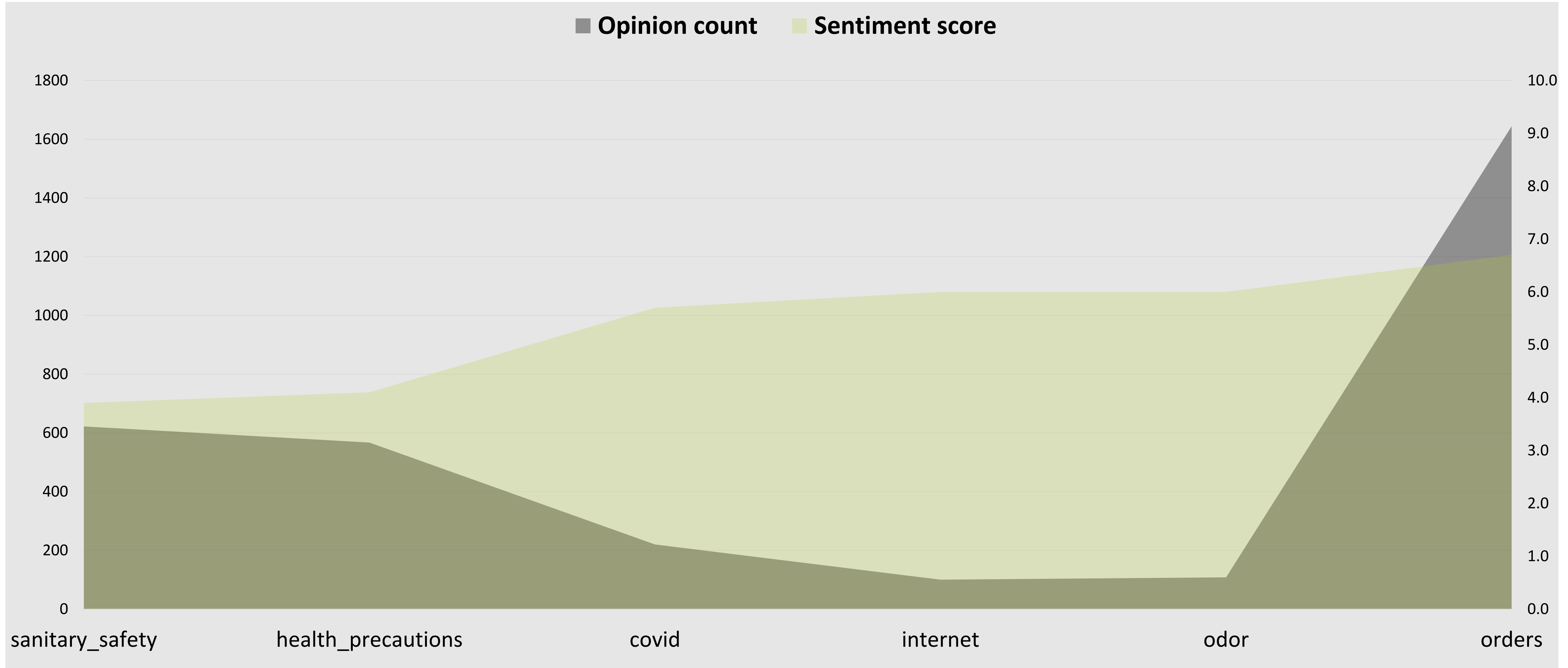


Period – May 2021 / April 2022



# Drivers of Negative Value – Restaurant

Which topics are the most frequent and negative in reviews?



Period – May 2021 / April 2022



# Summarizing Key Drivers & Barriers of Restaurant Value



## DRIVERS TO COMMUNICATE

## BARRIERS

Options for visitors looking for Aruba food “on a budget”

Boring menus / lack of creativity given the price

Local food options, special and creative menus

Some feeling of discrimination / clear lack of consideration

Friendly and caring attitude from staff

Waiting orders too long

Delicate menu including allergy-friendly and gluten-free dishes

Risks of food poisoning / sickness high in post-Covid consumer mindset

“Sense of place” (atmosphere, light, surrounding...)

Disappointment on special dishes and “signature plates”

Fun & entertainment

Unfair extra charges

Easy & flexible transportation options to reach food places

Reheated / not fresh food

## OTHER VALUE-RELATED CONVERSATION TRACKS

Regular tips shared on saving on food if buying in vs grocery shops



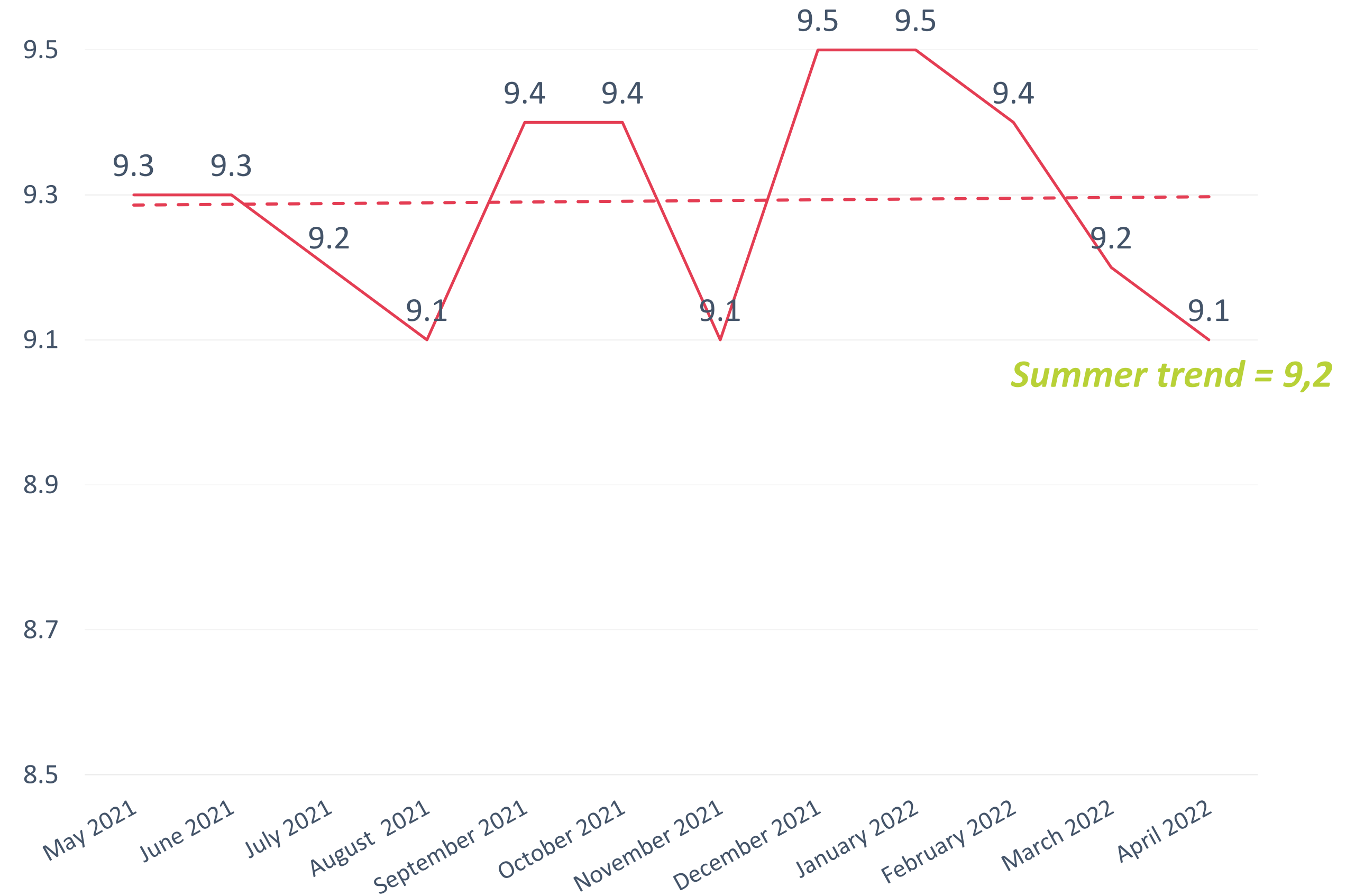
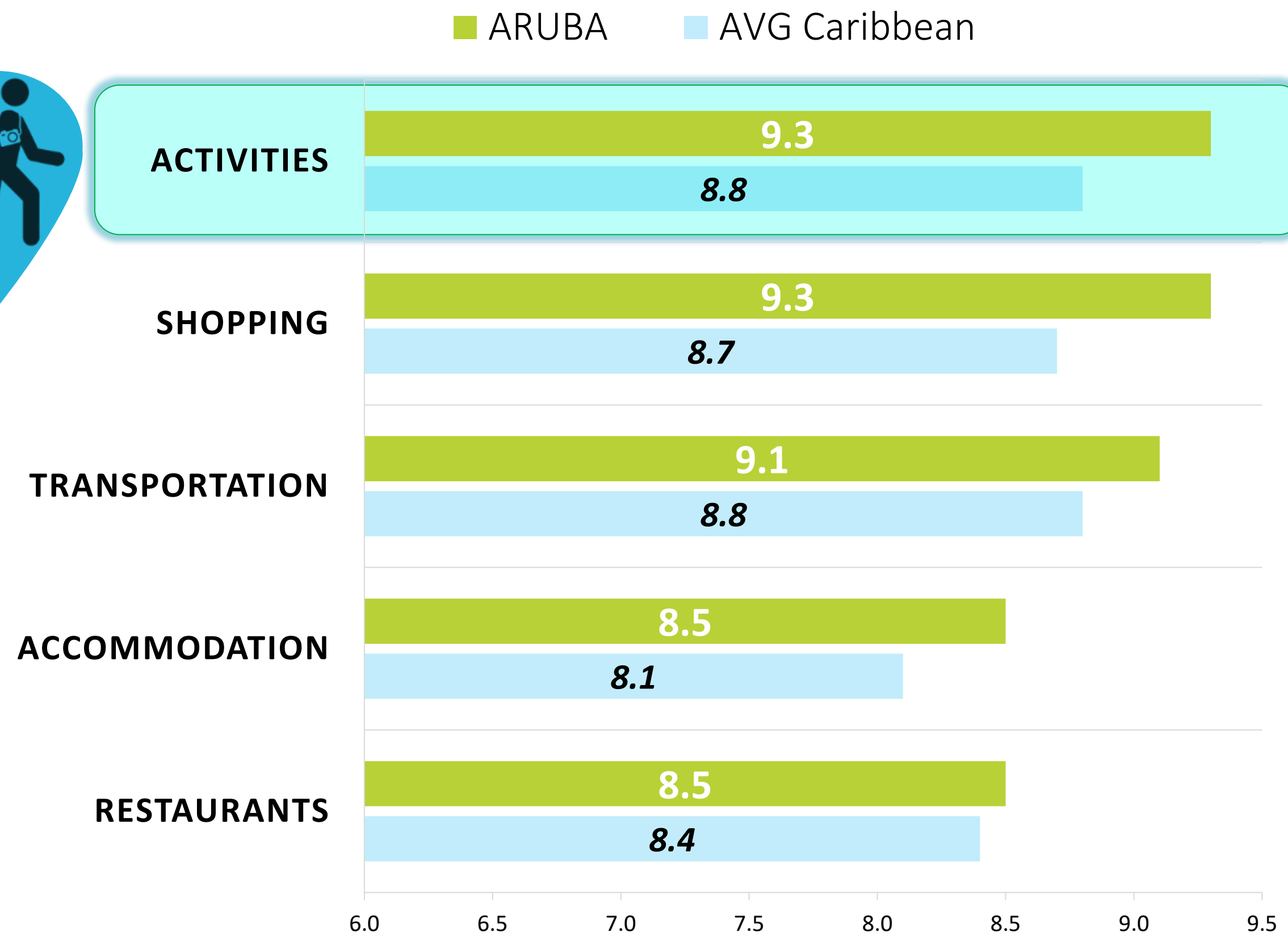
# ATTRACTIONS



Period – May 2021 / April 2022

# Positive and competitive value ratings overall

But recent trends suggest a close monitoring



The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

Period – May 2021 / April 2022

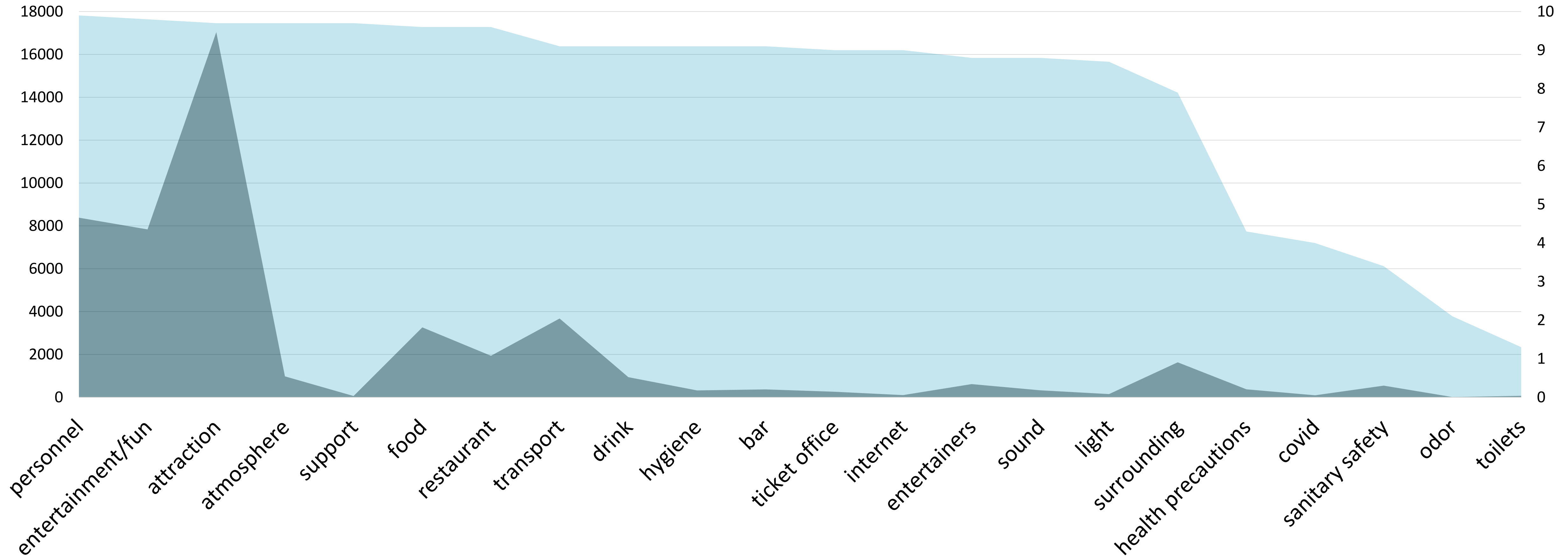


# Drivers of Positive Value – Attractions

Which topics are the most frequent and positive in reviews?



■ Opinion volume   ■ Sentiment score



Period – May 2021 / April 2022



# Drivers of Negative Value – Attractions

Which topics are the most frequent and negative in reviews?



■ Opinion count   ■ Sentiment score



Period – May 2021 / April 2022



# Summarizing Key Drivers & Barriers for Attractions' value



## DRIVERS TO COMMUNICATE

## BARRIERS

Available activities for budget travelers such as free or inexpensive attractions (Natural Bridge, Hooiberg Mountain hiking and views, trolley at Oranjestad...)

Garbage, dirty places, lack of maintenance

The “fun and entertaining” component in activities and attractions

Some aggressive staff attitude vs Covid policy « enforcement »

Knowledgeable guides

Casino staff with unfair behavior

Guides having a great sense of humor

Staff on boats sometimes careless about clients and nature

Priority given for safety / Feeling of reinsurance

The spa staff not as skillful as expected

The extra food experiences during activities and at attractions

Lack of care for animal well-being and environment (coral)

The musical ambiance during activities

Overcrowded attractions or activities

Roads leading to attractions lacking maintenance





# SHOPPING

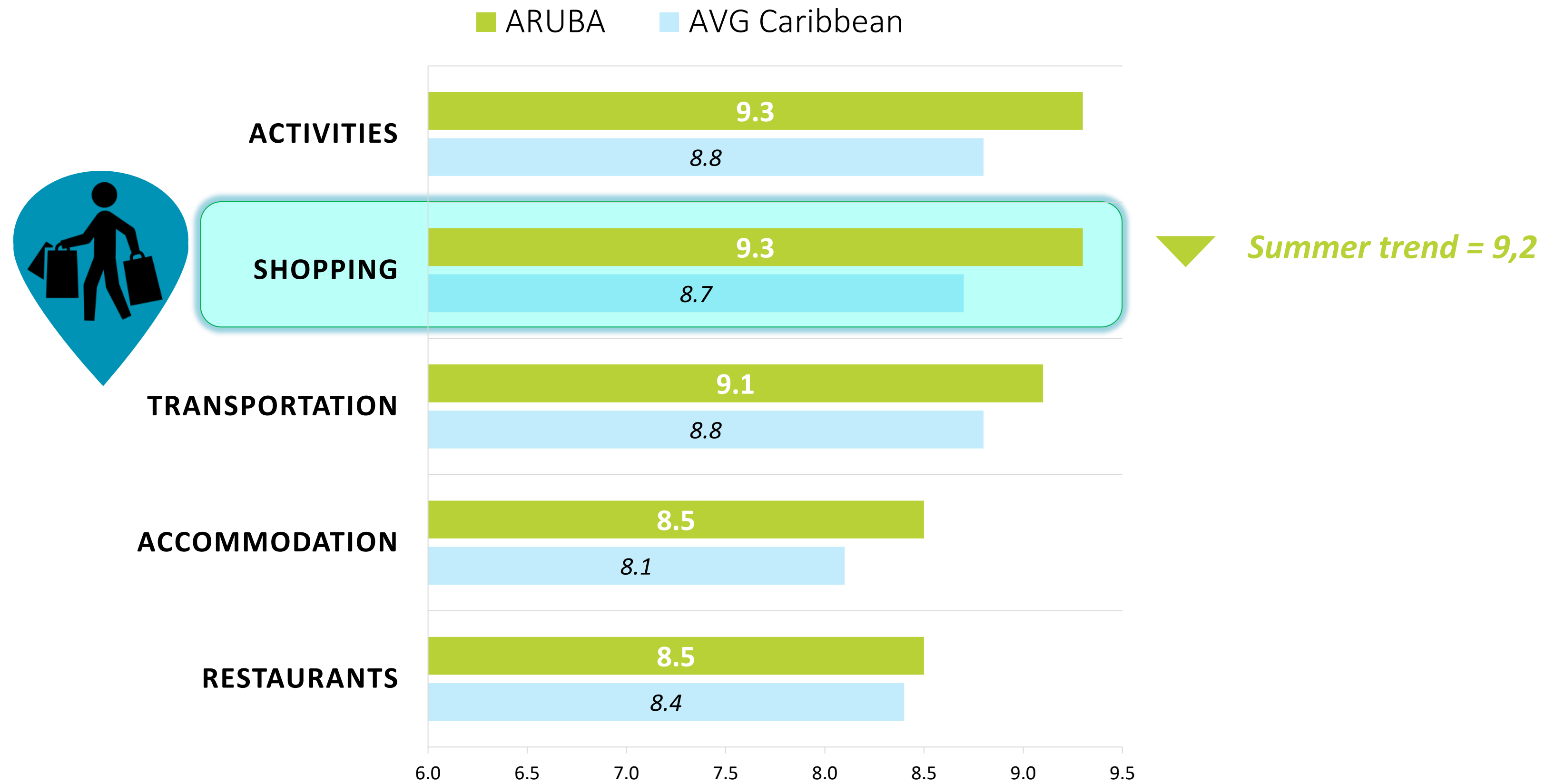


Period – May 2021 / April 2022

# Visitor Sentiment Trends – Value for Money



What tonality for Shopping?

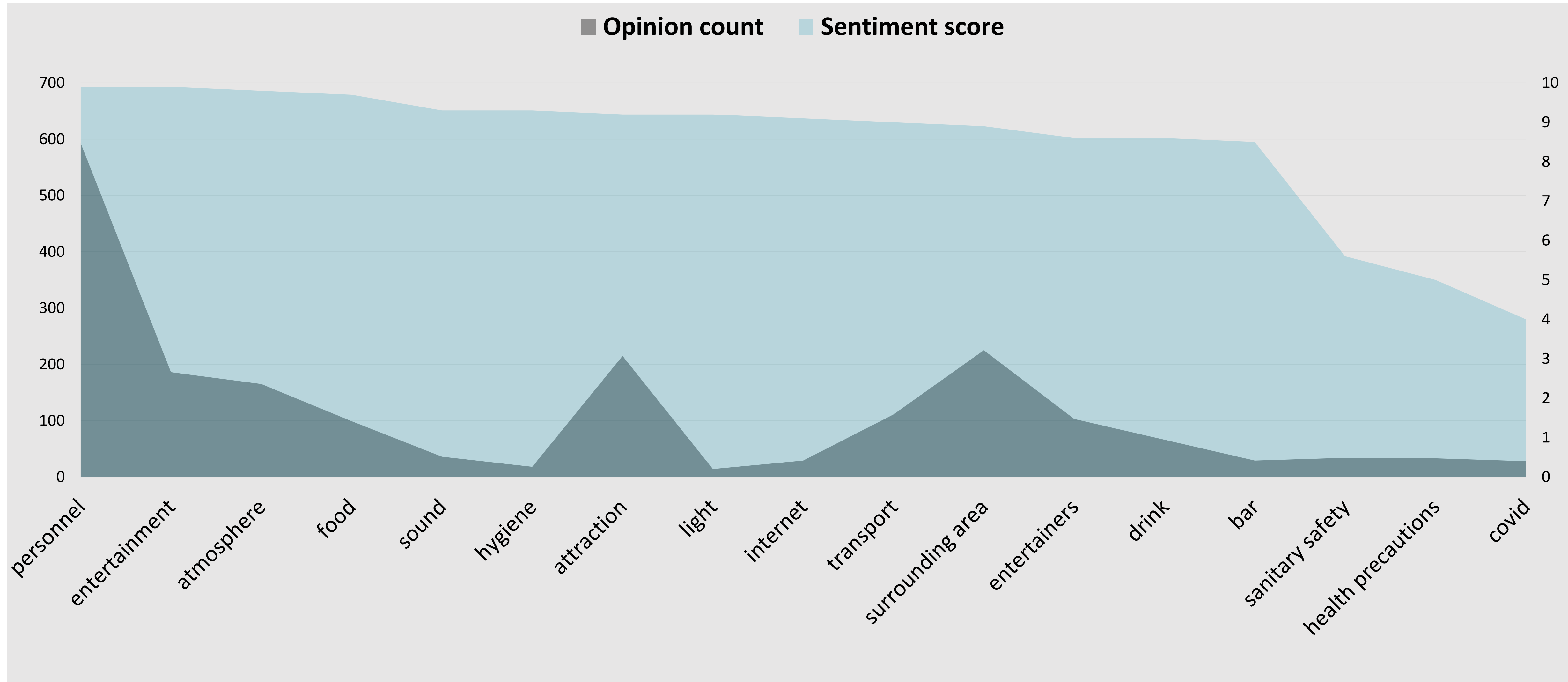


The *Value for Money* indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.



# Drivers of Positive Value – Shopping

Which topics are the most frequent and positive in reviews?



Period – May 2021 / April 2022



# Summarizing Key Drivers & Barriers for Shopping Value



## DRIVERS TO COMMUNICATE

## BARRIERS

Knowledgeable staff about the product and products' origin

Concerns around purchasing branded products in terms of price and authenticity

Entertainment touch in the shops and staff attitude

Dealing on jewelry products and bargain possibilities with sellers

No push or pressure to purchase

Several conversations develop regularly on where it's best to buy cigars

Interest for local products

Tax on liquors that may influence the perception of expensive prices

Shopping as a free night entertainment

The accessibility of shopping places can be an obstacle (i.e not walking distance or hard to plan).

Lively surrounding and atmosphere of shopping places

Concerns around not paying the best value while on this island depending on where you can find the products (at airport vs shops)

Sensorial experiences in and around the shopping places (including food options)

Easy access to shopping places and opportunities



# TRANSPORTATION

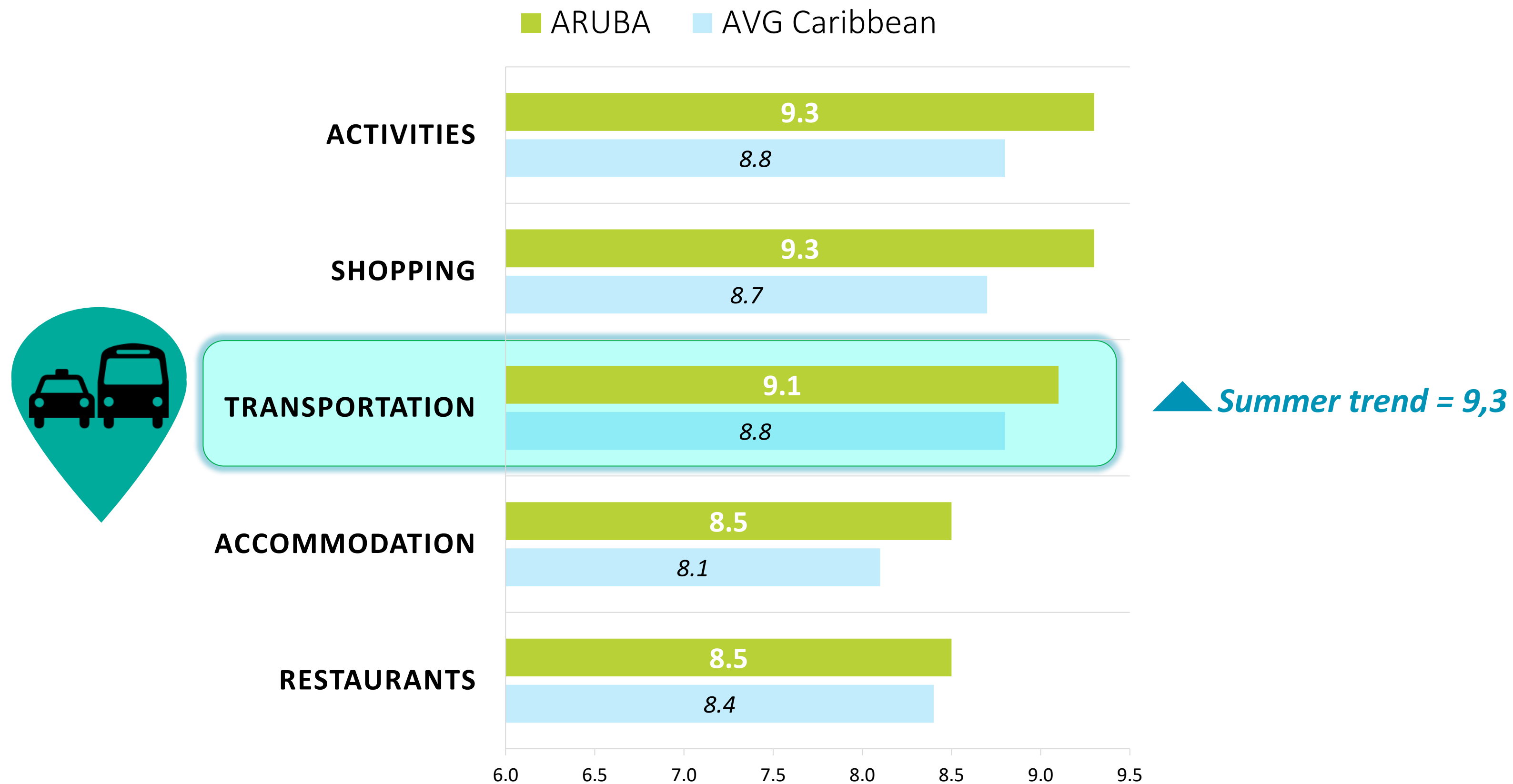


Period – May 2021 / April 2022

# Visitor Sentiment Trends – Value for Money



What tonality for transportation?



The **Value for Money** indicator results from a semantic analysis performed on text reviews written by visitors during their stay in Aruba.

Period – May 2021 / April 2022



# Summarizing Key Drivers & Barriers for Transportation



## DRIVERS TO COMMUNICATE

## BARRIERS

Punctuality

Taxis accepting only cash

Staff friendliness

Bus skipping the stops and passing over visitors

Knowledgeable drivers (sharing tips on the destination)

Bus not running based on the map

Staff / drivers becoming familiar over time

Caribbean music on board (on demand!)



# Other Conversation tracks about Aruba Value Sentiment





# Summarizing Key Drivers & Barriers

Destination level (not vertical specific)



## DRIVERS TO COMMUNICATE

Tips on low-cost flights and travel deals to Aruba

Cruise is one cheap option to travel to Aruba

Aruba is safe and prioritize the quality of experience vs prices

Aruba is a destination on the rise for the nomad style

A favorite destination for wedding and honeymoon celebrations

## BARRIERS

Aruba can be very expensive based on the season

Aruba is more expensive than Jamaica

Low season cheap flights to Aruba not always available

Conversations shared on scam/ flight booking issues

Trouble to transfer money to Aruba (RBC Bank) from the US

(Aruba becoming “less friendly” with Covid rules)

## OTHER VALUE-RELATED CONVERSATION TRACKS

Comparing Aruba with other Caribbean destinations

Tips to buy SIM cards in Aruba for tourists

04

# Take-Aways!



# The Value for money Challenge!



Safety, Environment, Covid,  
Social, Geopolitics...

**Aruba DNAs in the region!**

Factual Price levels  
vs competition

**Aruba is challenged**

Quality, Service Consistency  
Tangible/Intangible visitor experience  
**Currently high but requires extra attention  
as competition grows and mainstream  
cost-sensitive visitors return. Watch recent  
downward trends and lack of quality  
consistency along the visitor journey!**

# ACCELERATING THE VALUE FOR MONEY EXPERIENCE

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1. Beyond basics, **extra visible efforts in renovation**, hygiene and **housekeeping management**
2. **Hedonistic and sensorial experiences** (décor, spa, sound environment)
3. **Active/sportive options** fit well the post-Covid mindse.
4. **Adding “sense of place” in food places** (atmosphere, light, surrounding...)
5. **Extra fun and entertainment component** from staff/guides/shops/transport personnel
6. **Easing access and transport options** to reach food places and attractions – **Lowering stress around mobility**
7. **Adding foodies moments at any occasions** along the visitor journey
8. **Boosting event-driven options** including large and **small pop-up events** with limited crowds
9. Promoting safe **socialising opportunities** and **“good moments” shared with travel companions**
10. **Hybrid experiences** that connect indoor/outdoor facets and various themes (culture, food, sports, nature, shopping...)
11. Communicating on the **choice in ranges of budget options** from affordable to high-end private experiences
12. Developing **privilege & exclusive options for affluent visitors** so to increase their sentiment around value for money

Thank you  
for your attention!