



# Visitor Sentiment Study

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Aruba Tourism Authority  
Strategy, Planning, and Research Unit  
December 18, 2023

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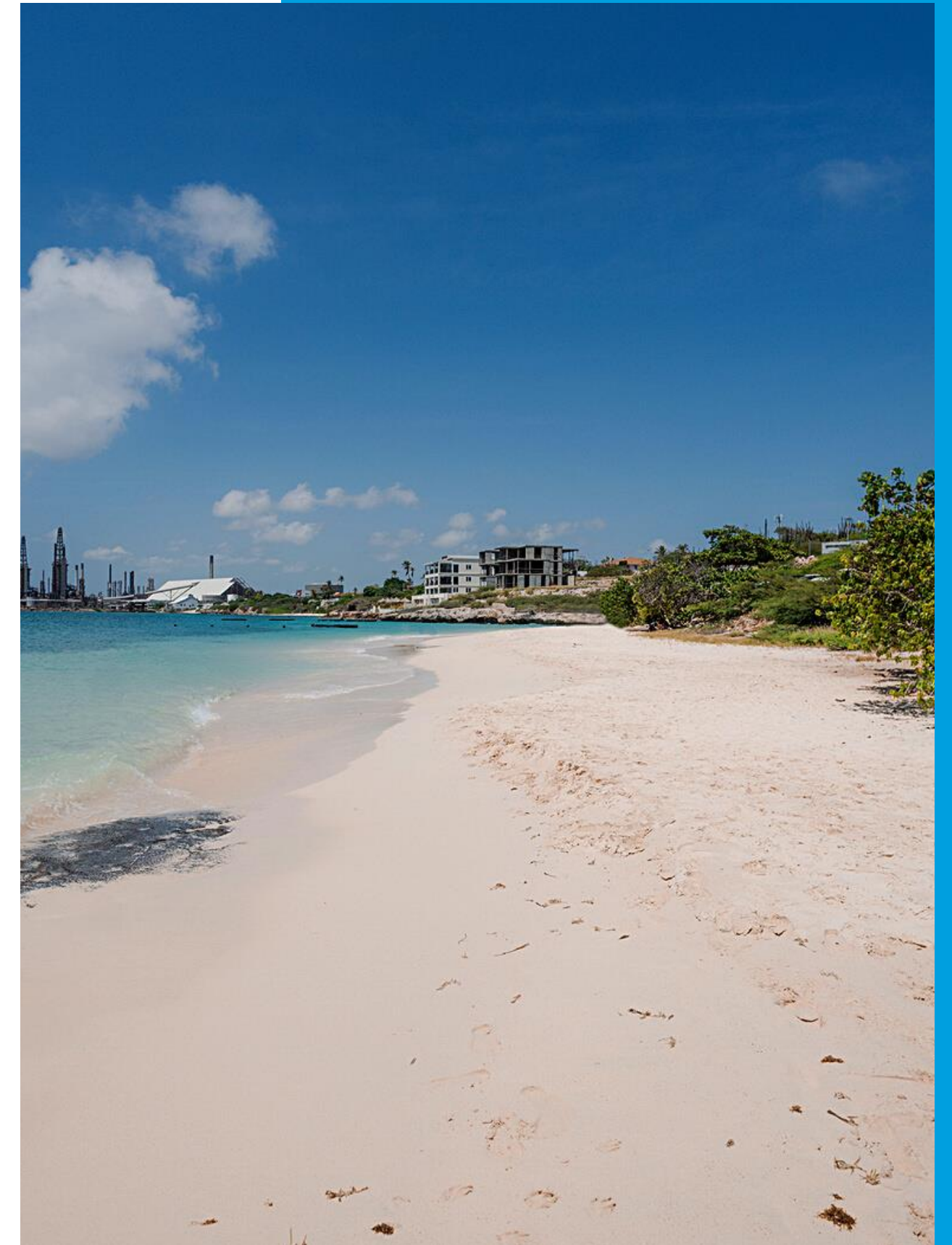
- Study Background
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# BACKGROUND

## KEY OUTCOMES

The Aruba Tourism Authority commissioned Business IQ to conduct a visitor sentiment study. The study seeks to provide insights into:

- **Visitors' perception of crowding at key attraction sites in Aruba (14 sites);**
- **Visitors experience at key attraction sites in Aruba (14 sites);**
- **Visitors' level of acceptability of crowdedness by key attractions sites in Aruba (14 sites);**
- **Visitors' likelihood to return to Aruba;**
- **Visitors' perception of crowding broken down by demographic information (market and income);**
- **Comparative analysis of visitors' sentiment and perception regarding crowding since the last 2018 study (to sites that were monitored in 2018).**



# SURVEY METHODOLOGY

## DATA COLLECTION

- N = 1522 surveys were conducted among visitors in Aruba.
- The data was collected face-to-face, on-site;
- Each site had an average of 6-8 data collectors, and visitors were approached and invited to participate in the survey;
- The data collectors consisted of Freshmen students of the University of Aruba in the Tourism and hospitality sector and had present with them a data collector supervisor that consisted of lecturers and experienced data collectors hired by BIQ;
- Data was collected from Oct 20 - Nov 4 on weekends and weekdays following a morning(9 am - 11 am), afternoon (2 pm - 4 pm), and early evening schedule (4 pm- 6 pm depending on the location)

## SURVEY METHODOLOGY

- The survey consisted of on average 34 questions was available in English;
- The survey had an Aruba pen as a Thank you survey incentive;
- The survey was collected on hard copy paper and was accompanied by a picture of the designated site measuring the crowdedness perception;
- The survey had a 90% completion rate;
- The survey took approximately 8- 10 minutes to complete;

# Data collection by site



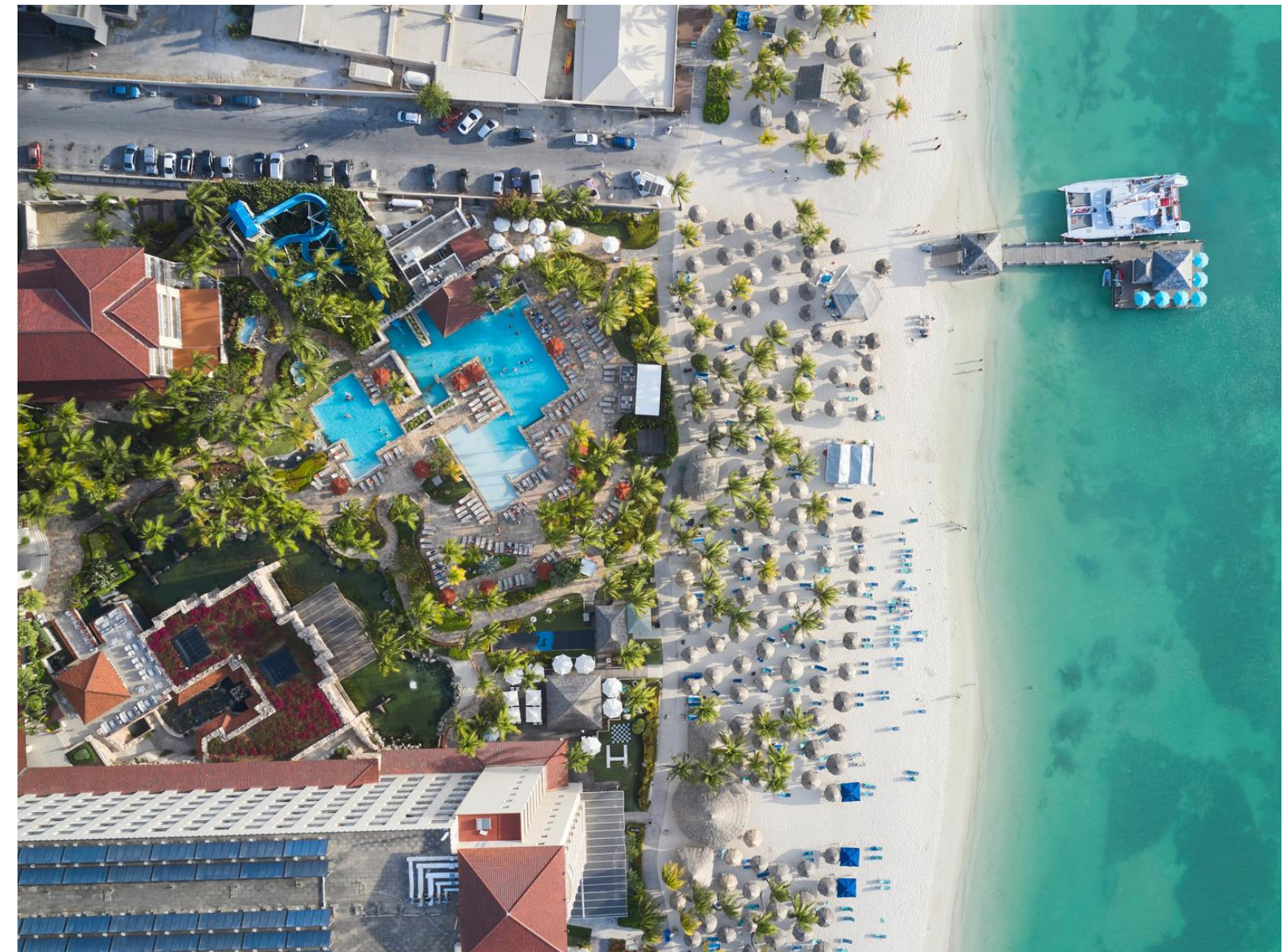
Site	Frequency	Percentage
California Lighthouse	202	13.3%
Eagle Beach	172	11.3%
Alto Vista	168	11%
Palm Beach	156	10.2%
Arashi Beach	149	9.8%
Baby Beach	128	8.4%
Conchi	103	6.8%

Site	Frequency	Percentage
Bushiribana	97	6.4%
Mangel Halto	87	5.7%
Ayo	79	5.2%
Casibari	76	5%
Fontein Cave	45	3%
Quadirikiri Cave	41	2.7%
Rodger's Beach	19	1.2%

# SAMPLE REPRESENTATIVENESS

## STAY-OVER VISITORS

- As per year-end 2022, Aruba welcomed 1,100,997 stay-over visitors and 876,314 cruise visitors;
- At 95% confidence level and an error margin between 3 - 3.5%, a 785 - 1067 sample size is needed;
- In this study, we have a sample size of 1522- meaning the study has a representative sample of our visitors.

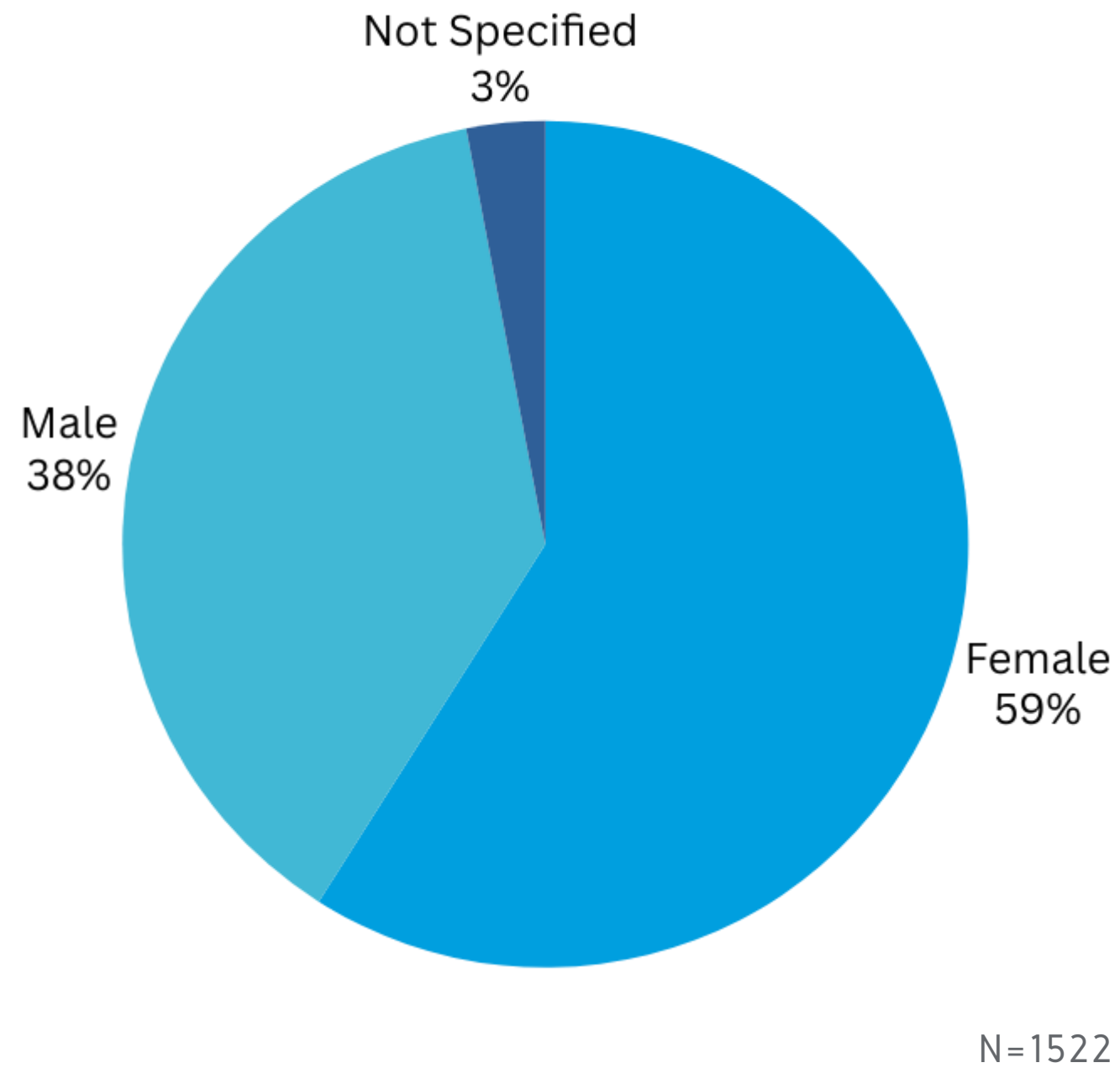




# DEMOGRAPHICS

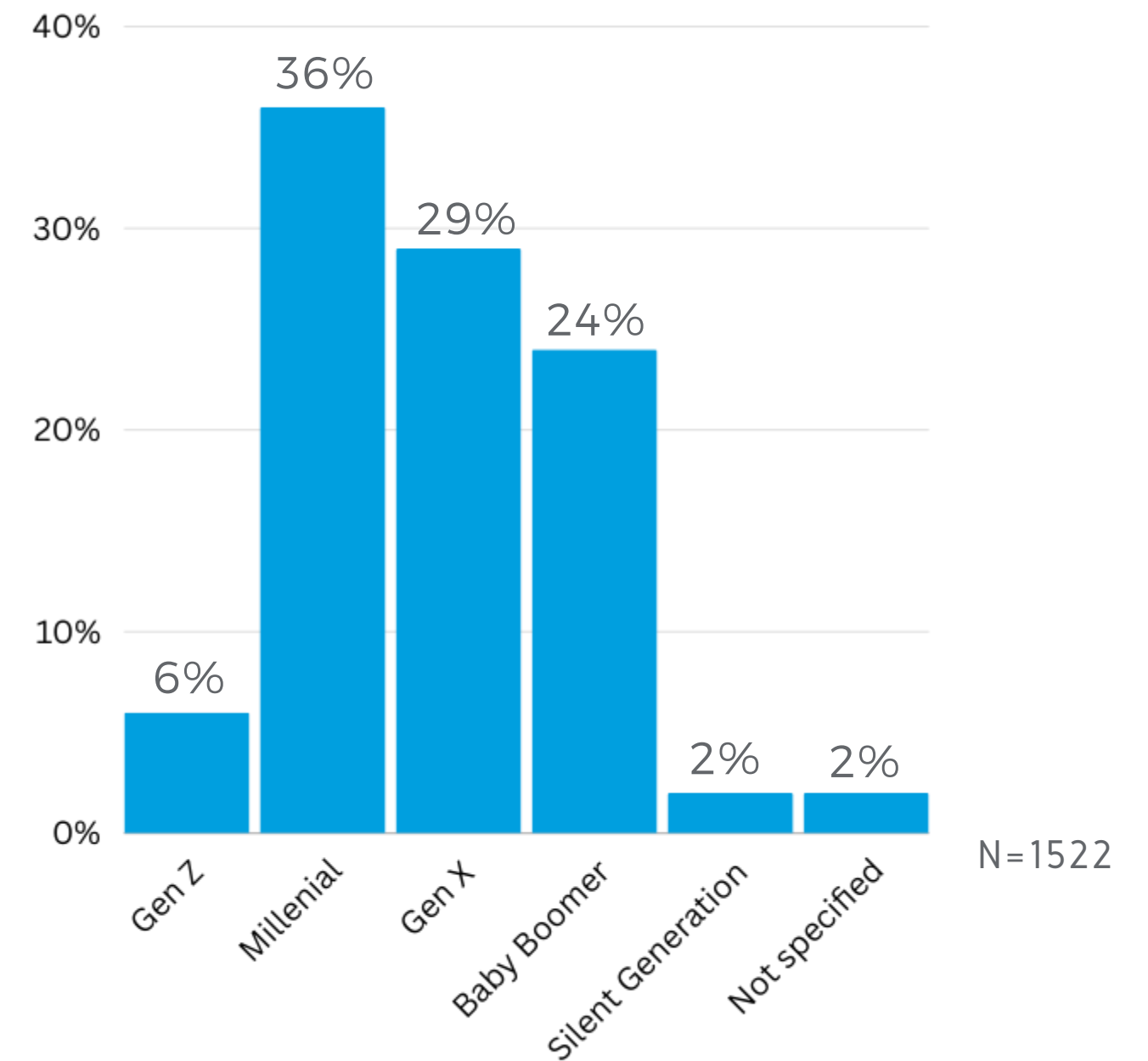
# DEMOGRAPHICS

## GENDER



## GENERATION

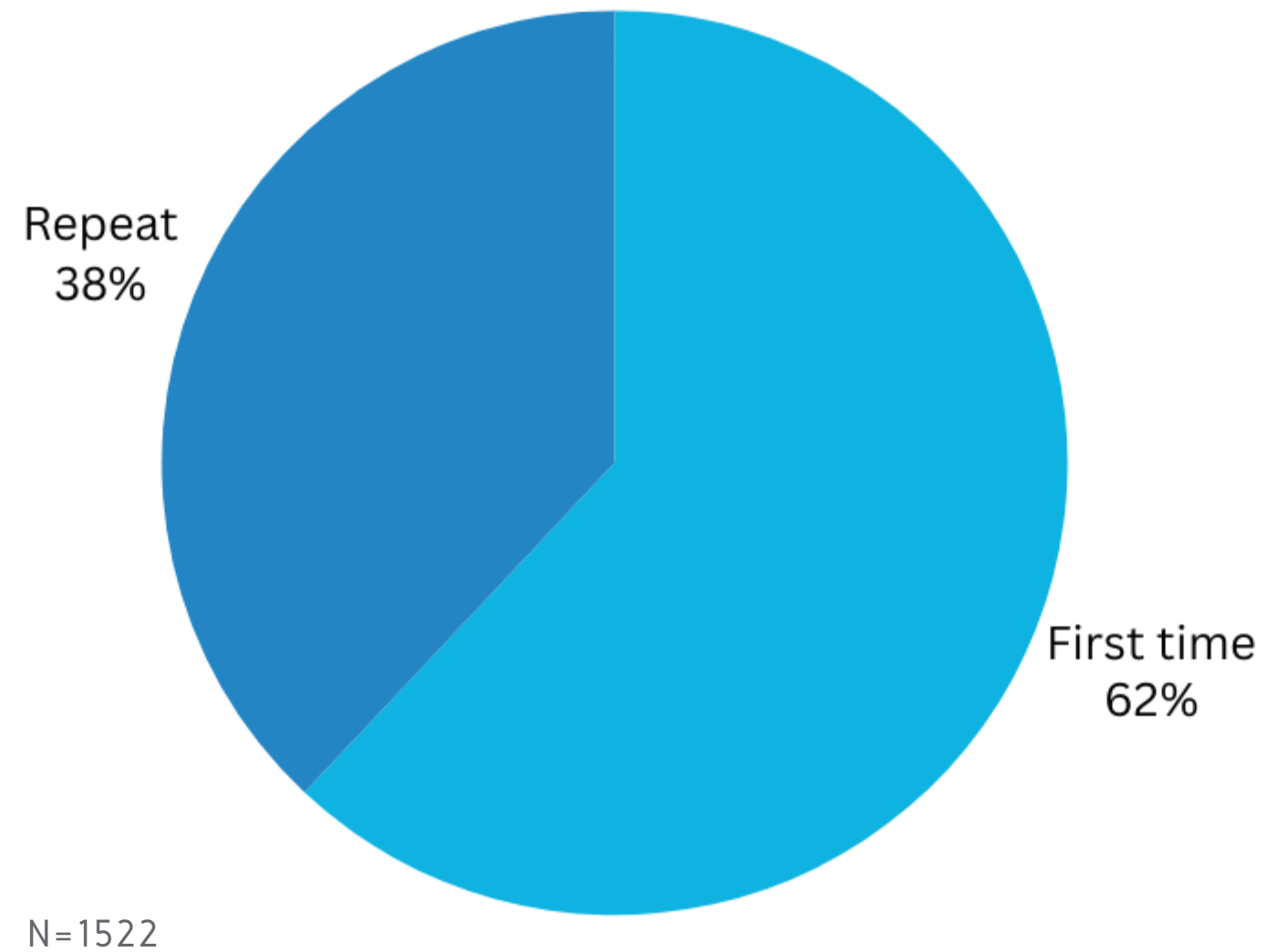
▶ AVERAGE AGE 46 YEARS OLD



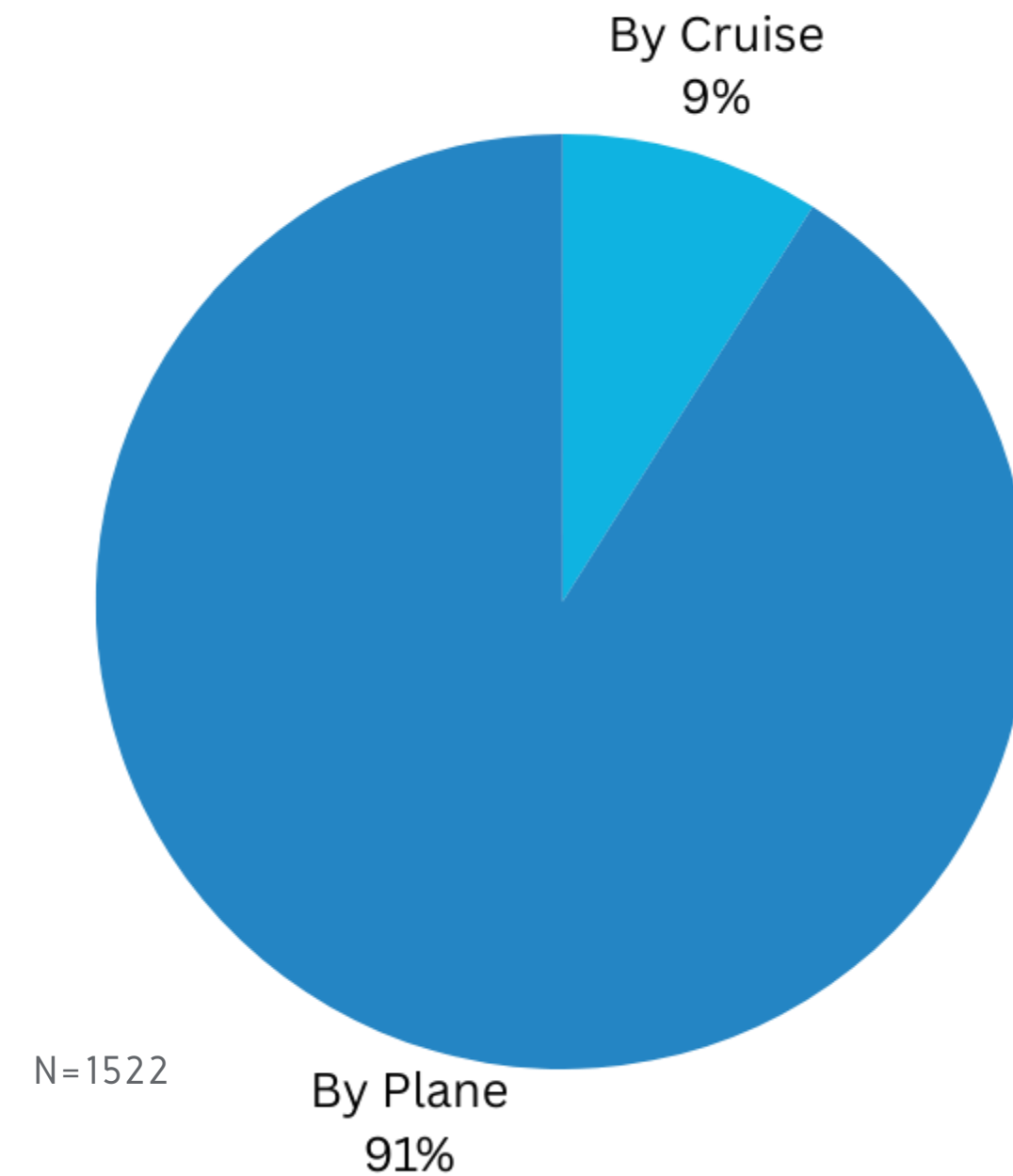


# STAY-OVER VISITORS

Q: IS THIS YOUR FIRST VISIT TO ARUBA?

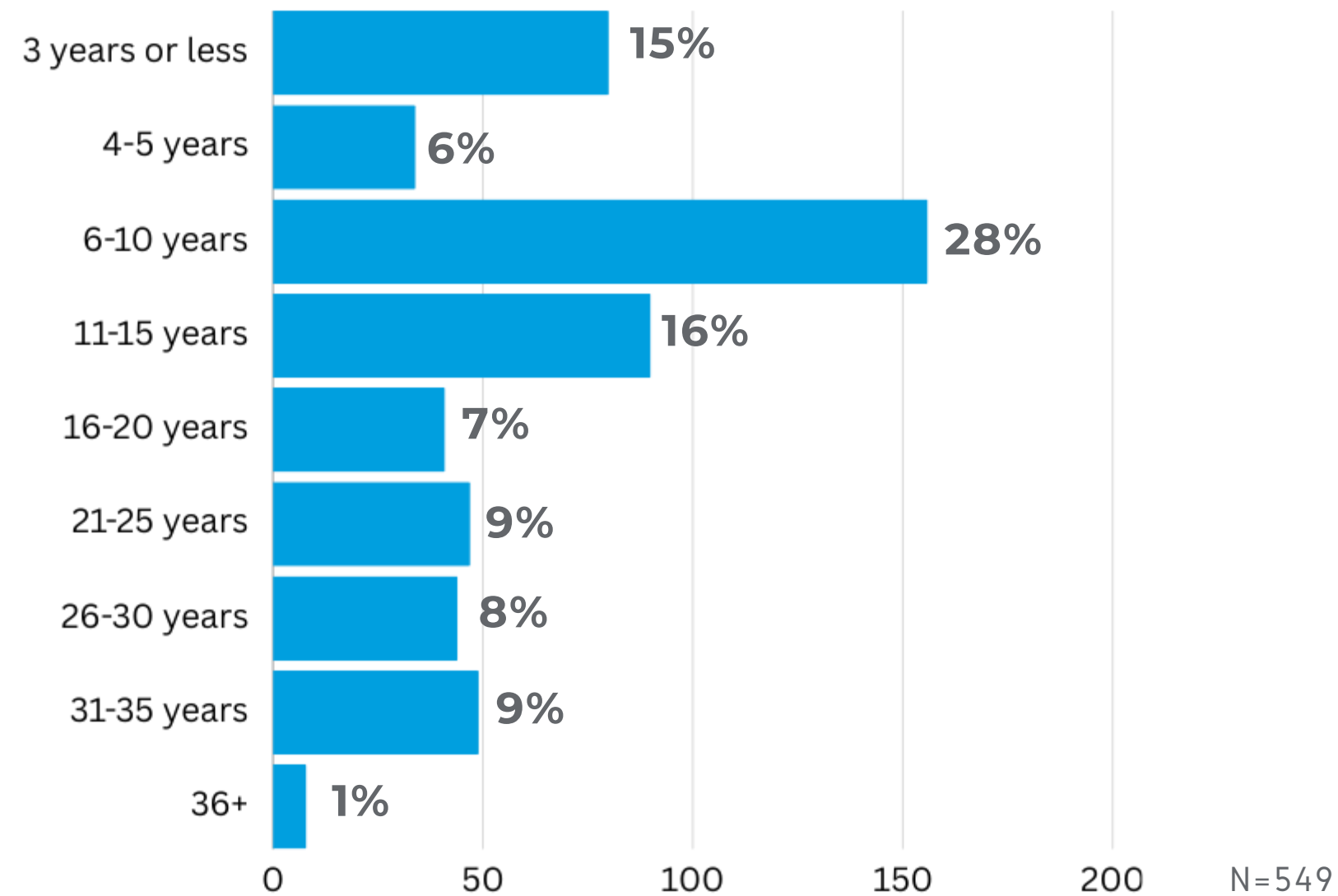


Q: DID YOU ARRIVE BY PLANE OR SHIP?

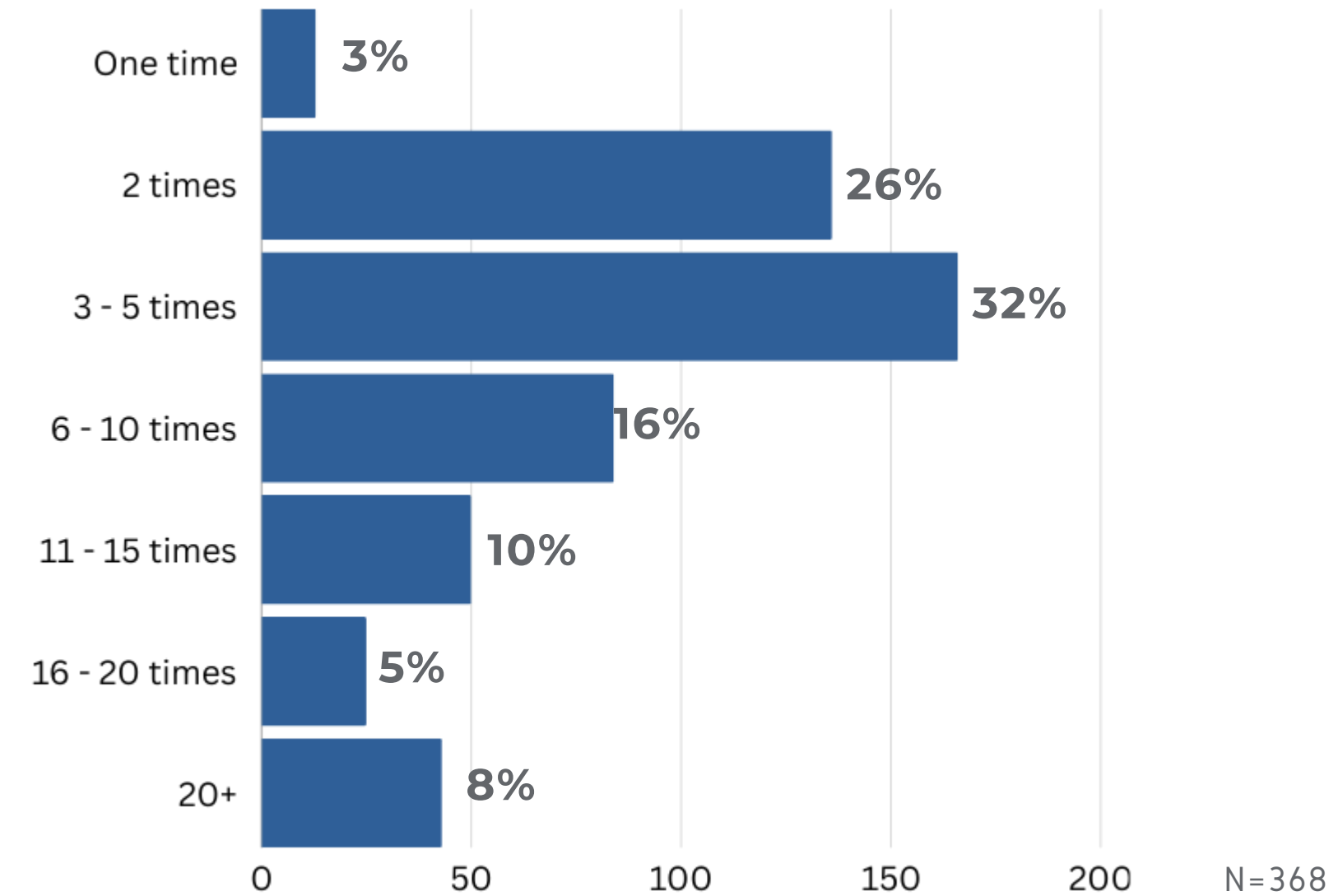


# VISITATION

Q: WHAT YEAR WAS FIRST VISIT?

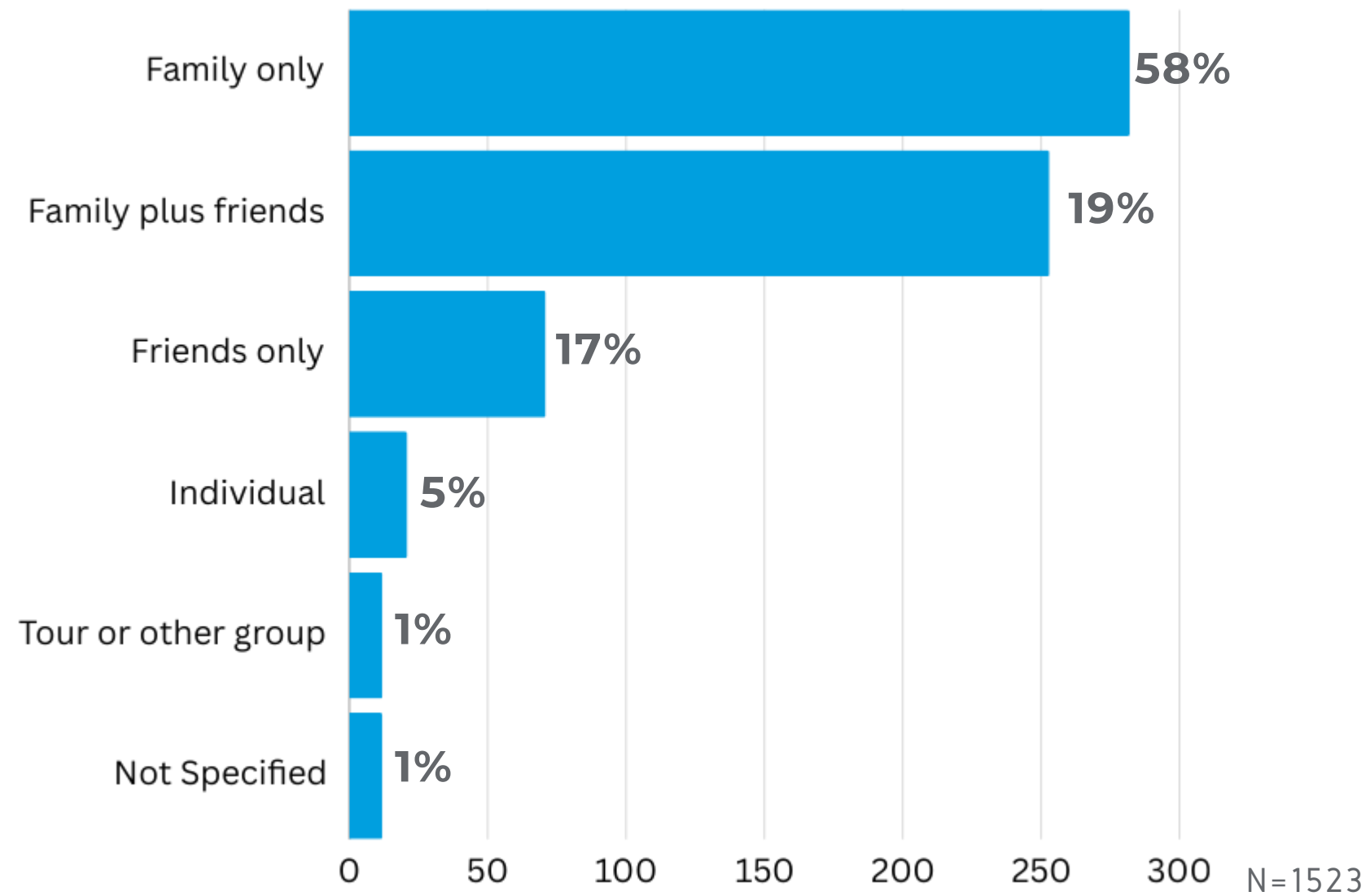


Q: HOW MANY TIMES HAVE YOU VISITED



# STAY-OVER VISITORS

Q: PLEASE SELECT THE BEST CHOICE THAT DESCRIBES YOUR TRAVELING PARTY



Q: HOW MANY PEOPLE INCLUDING YOURSELF ARE IN YOUR TRAVELING GROUP



**5 PEOPLE**

N=1450

Q: HOW MANY DAYS ARE YOU SPENDING IN ARUBA

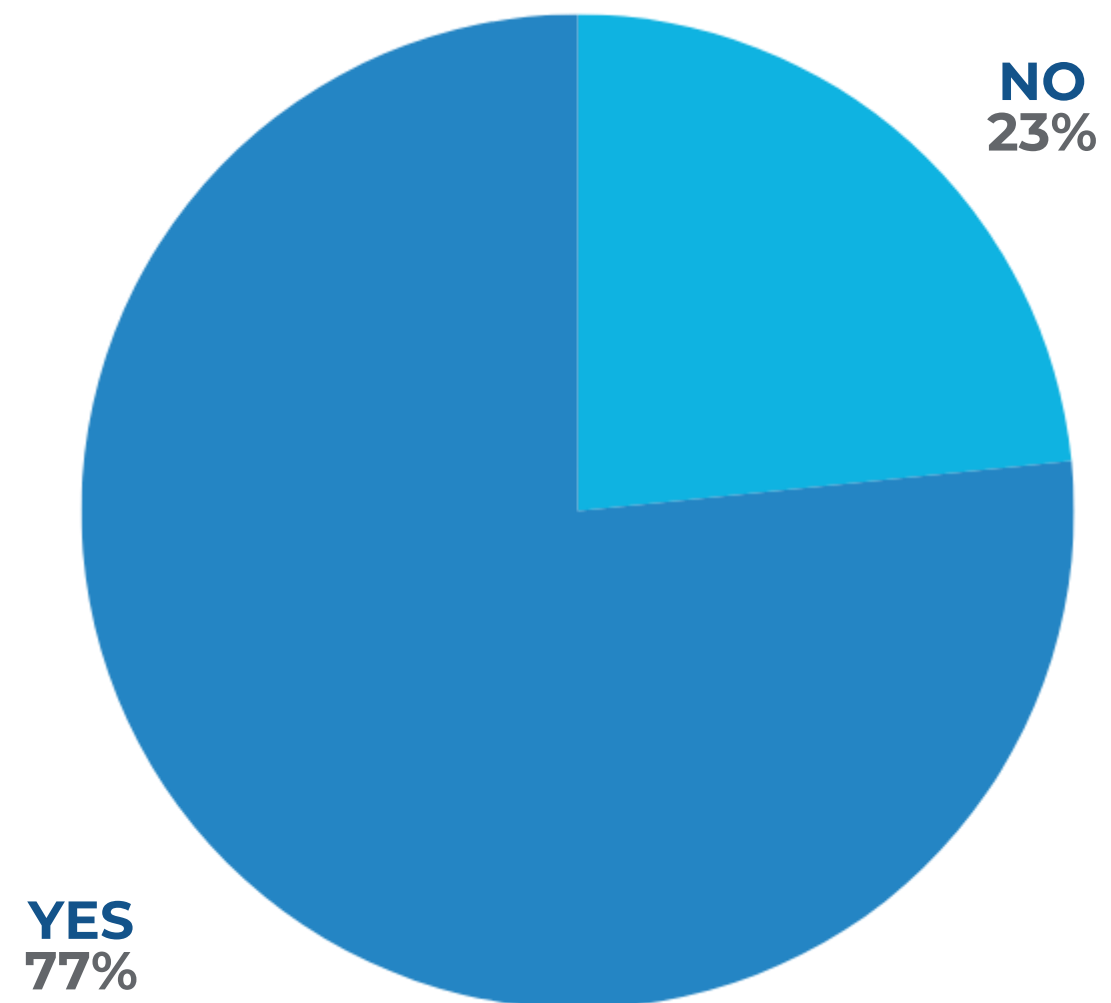


**8.8 DAYS**

N=1477

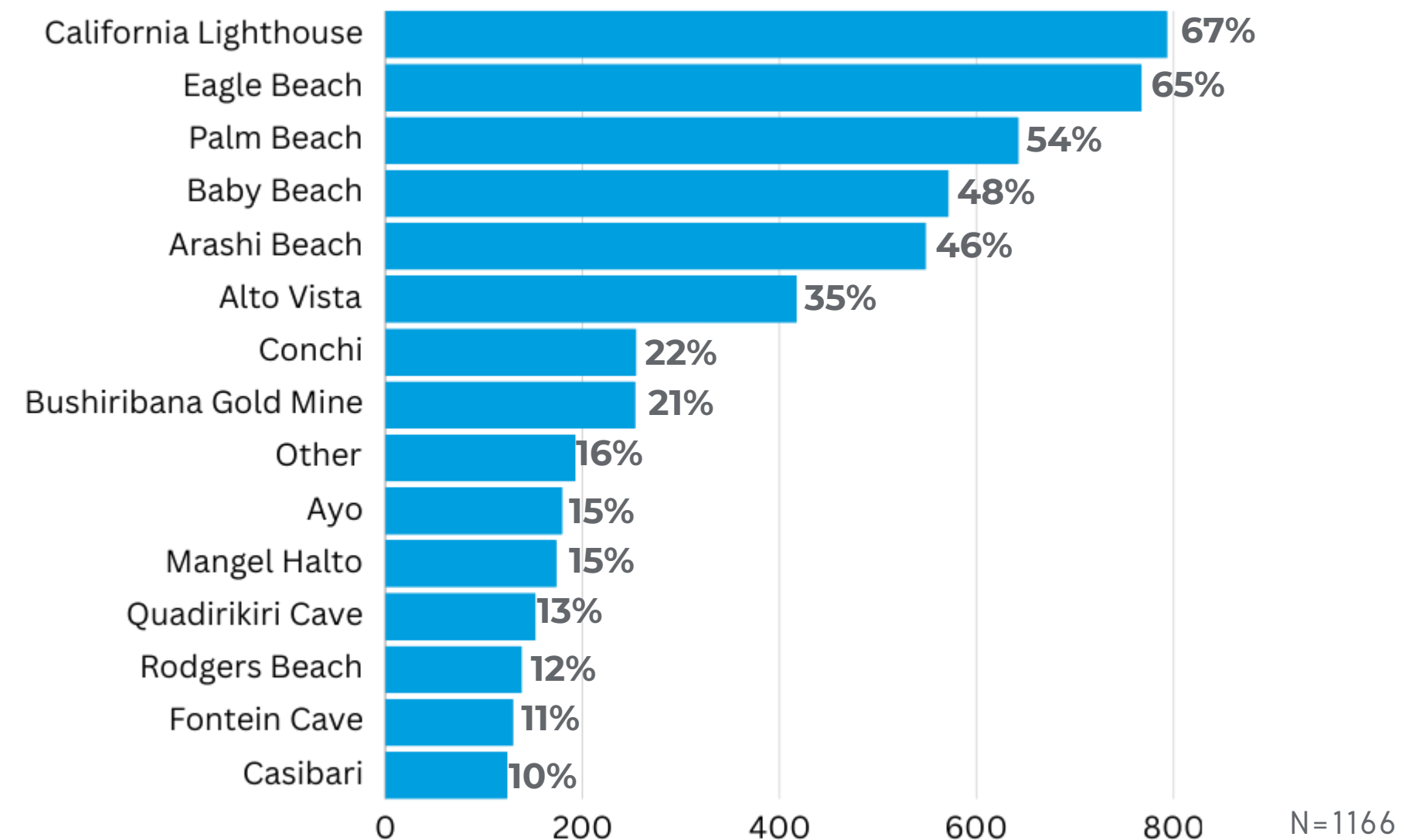
# ON-ISLAND BEHAVIOUR

Q: UNTIL NOW (DURING YOUR STAY IN ARUBA), HAVE YOU VISITED MULTIPLE LOCATIONS?



N=1522

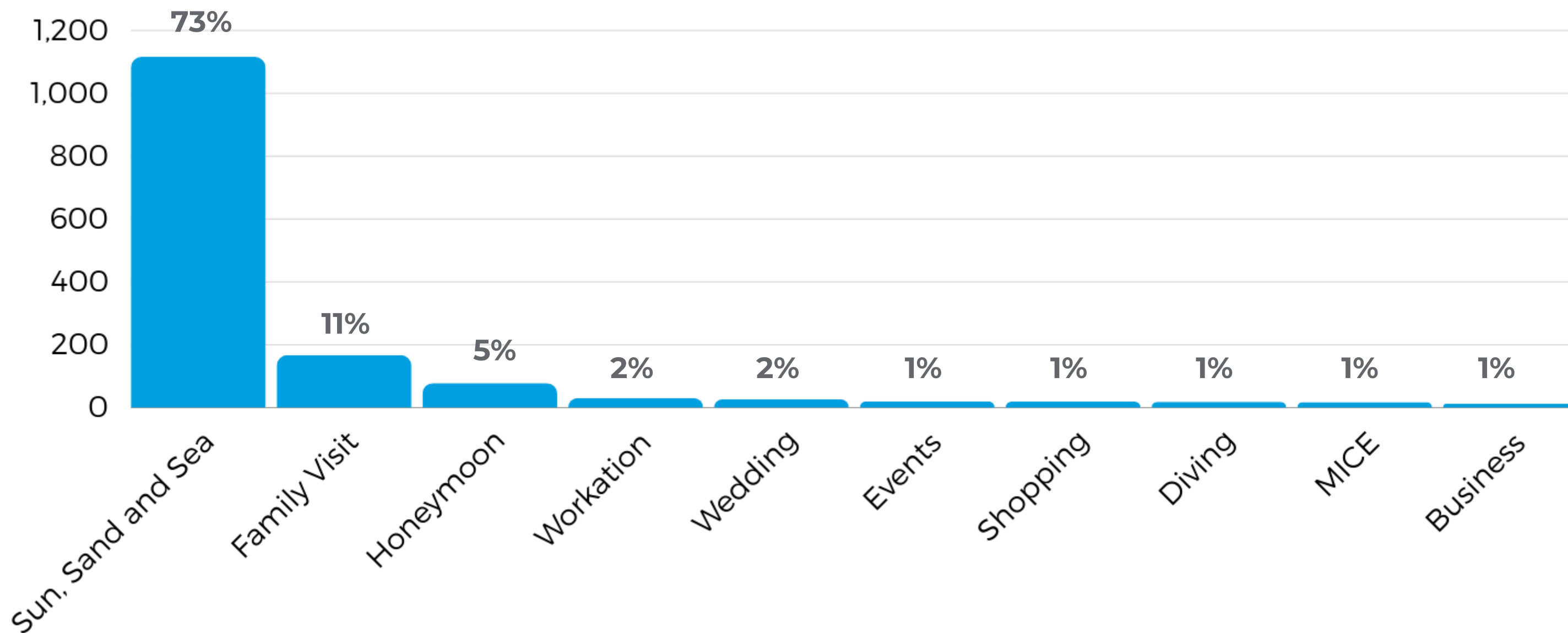
Q: WHICH LOCATIONS?



N=1166

# PURPOSE OF VISIT

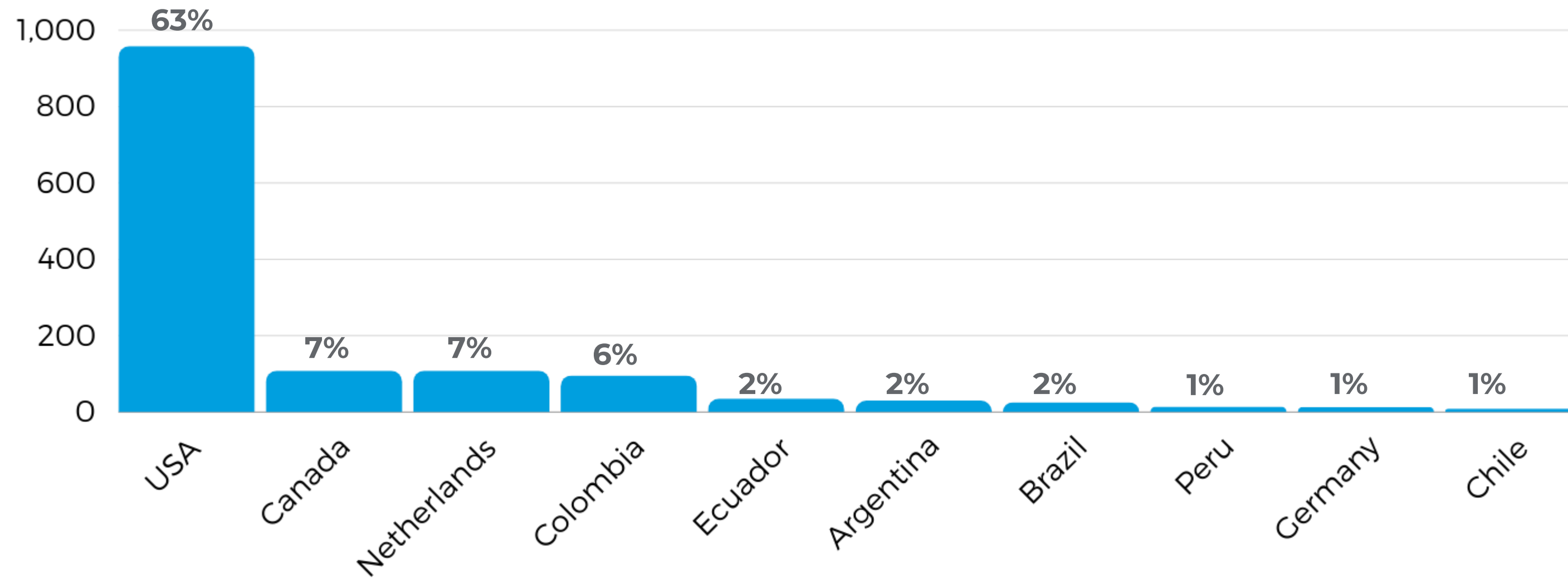
Q: WHAT IS YOUR PRIMARY PURPOSE OF VISIT?



N=1522

# TOP 10 COUNTRY OF VISIT

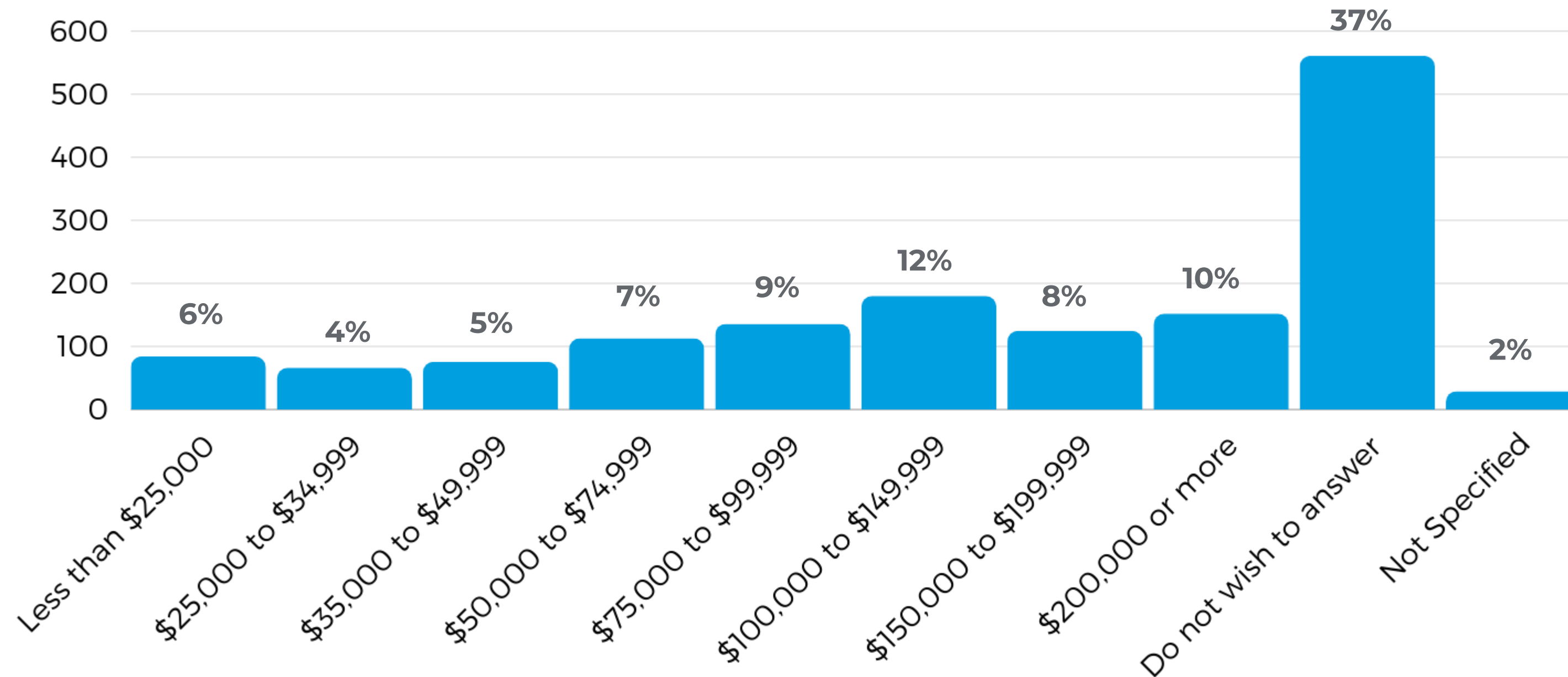
Q: WHICH COUNTRY ARE YOU FROM?



N=1522

# VISITOR INCOME

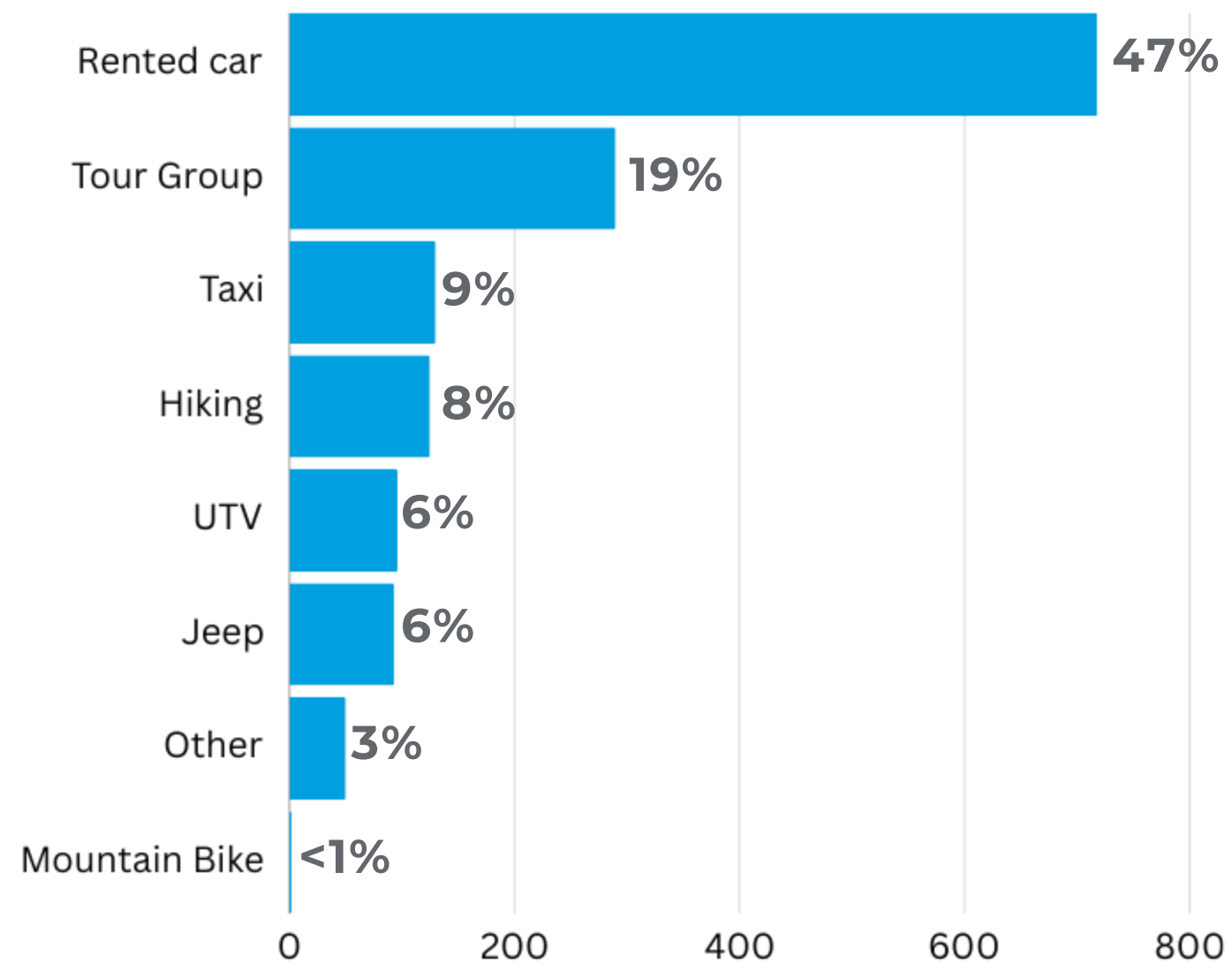
Q: WHICH CATEGORY BEST DESCRIBES YOUR TOTAL ANNUAL HOUSEHOLD INCOME?



N=1523

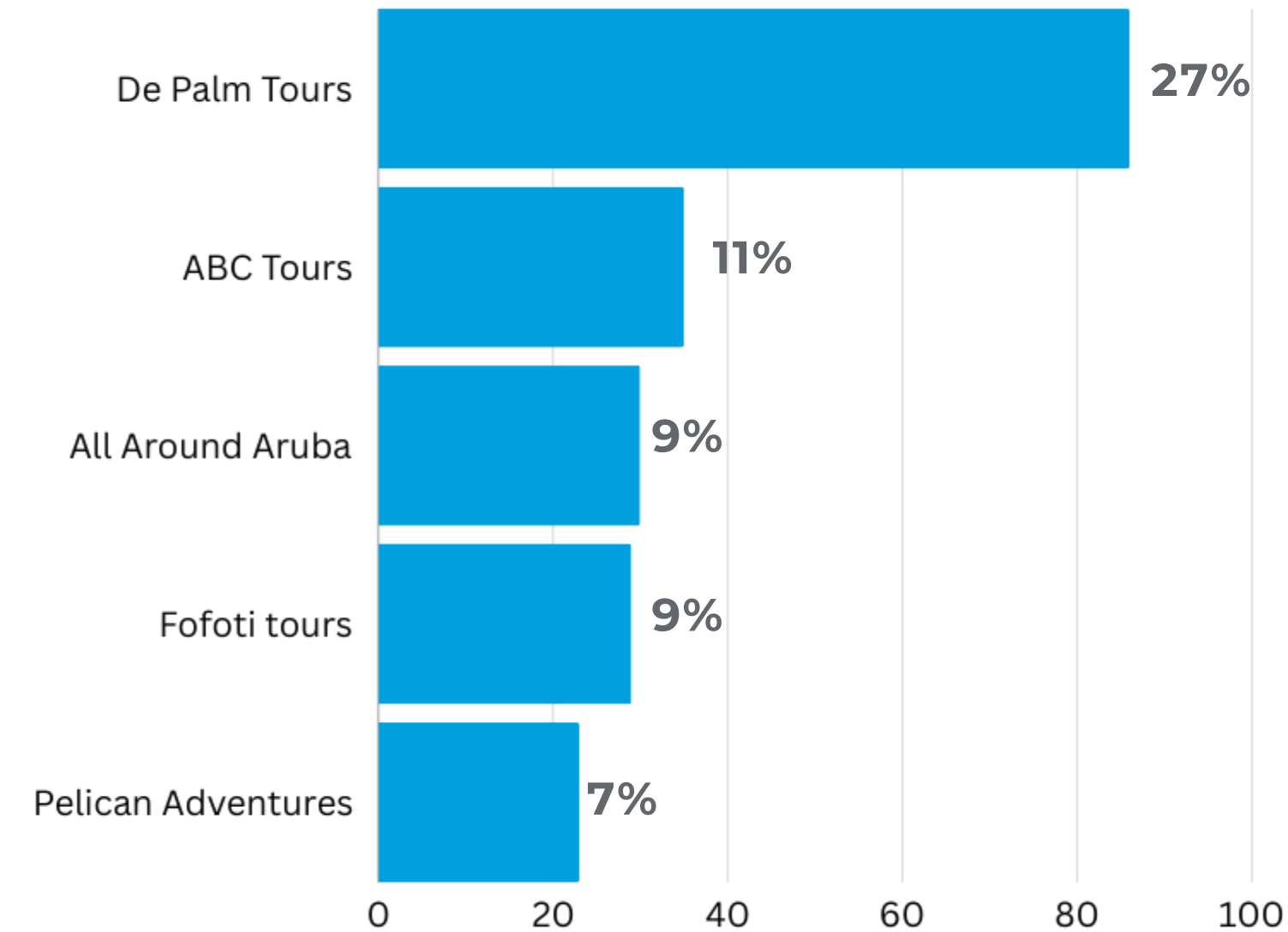
# SITE VISITS

Q: HOW DID YOU GET TO THIS SITE TODAY?



N=1523

Q: TOUR - PLEASE SHARE WHICH TOUR COMPANY  
TOP 5 TOUR COMPANIES



N=332

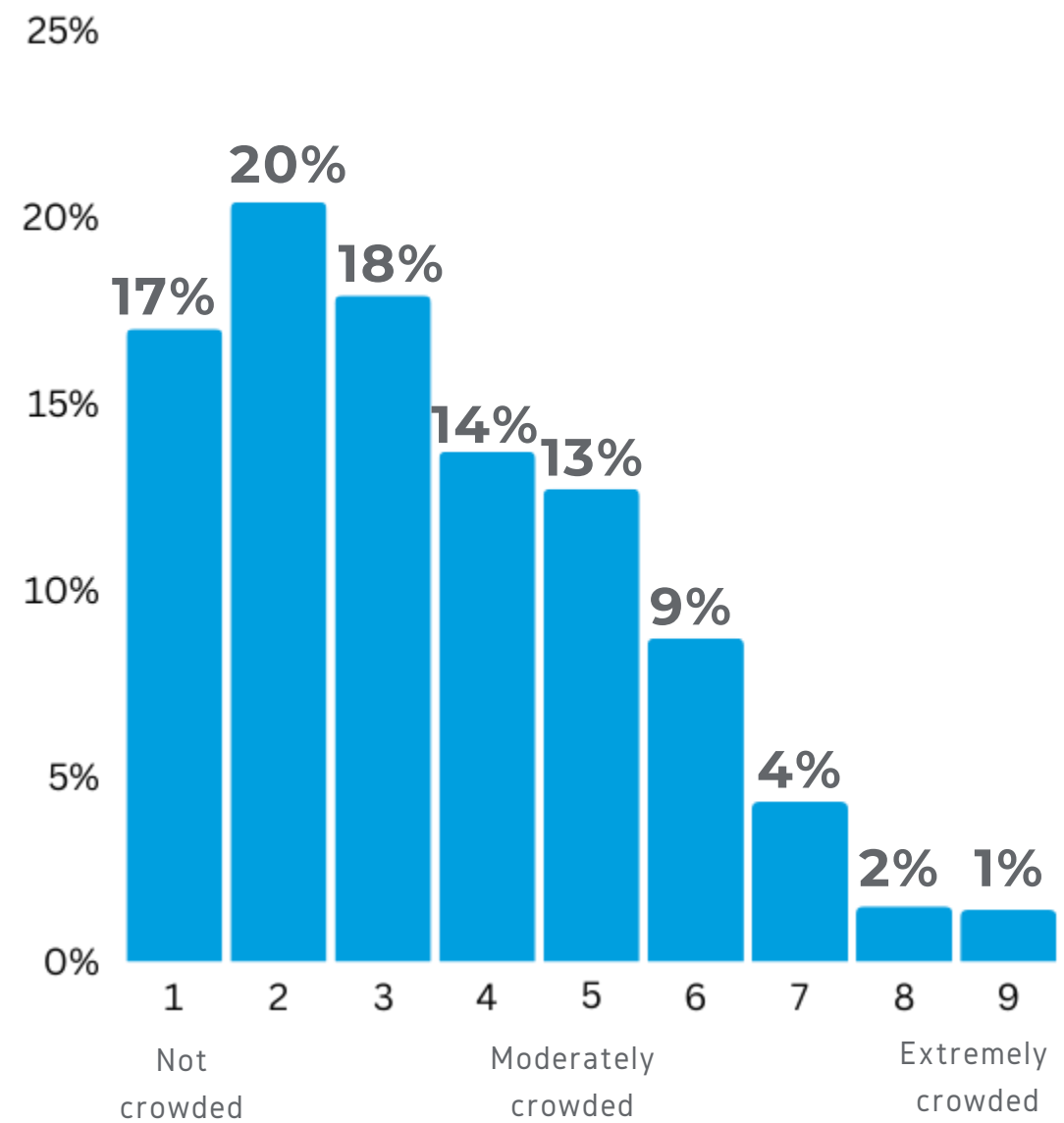




# On-site Crowdedness

# ON-SITE CROWDEDNESS

Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY



N=1522

2% undefined

Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY

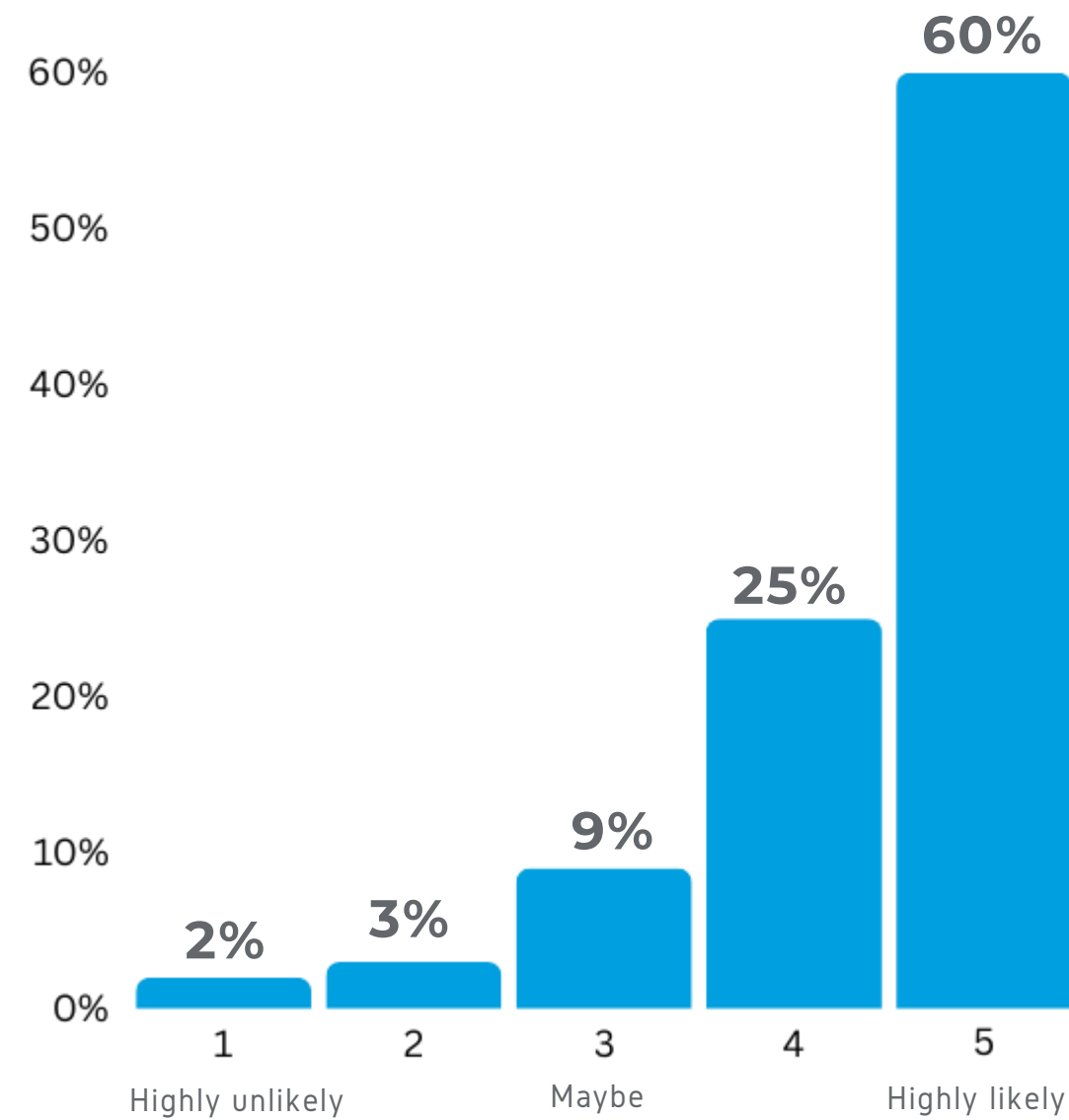


3.3= NOT CROWDED  
OVERALL SCORE OF ALL 14 LOCATIONS

N=1522

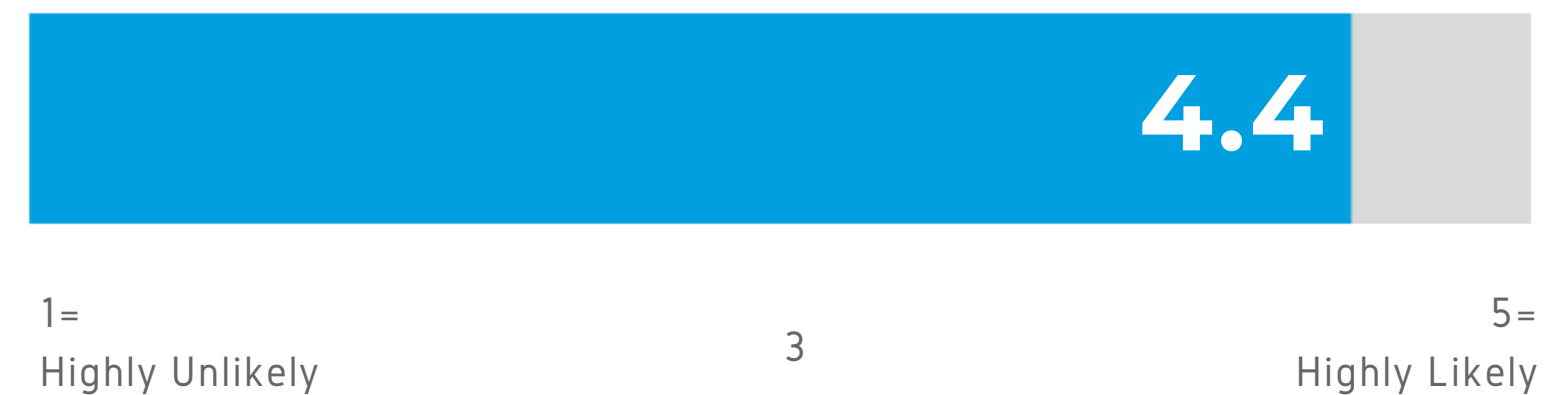
# LIKELIHOOD TO RETURN

Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA UNDER THE CURRENT CONDITIONS YOU EXPERIENCED DURING THIS TRIP?



**85% HIGHLY LIKELY TO RETURN UNDER CURRENT CONDITIONS**

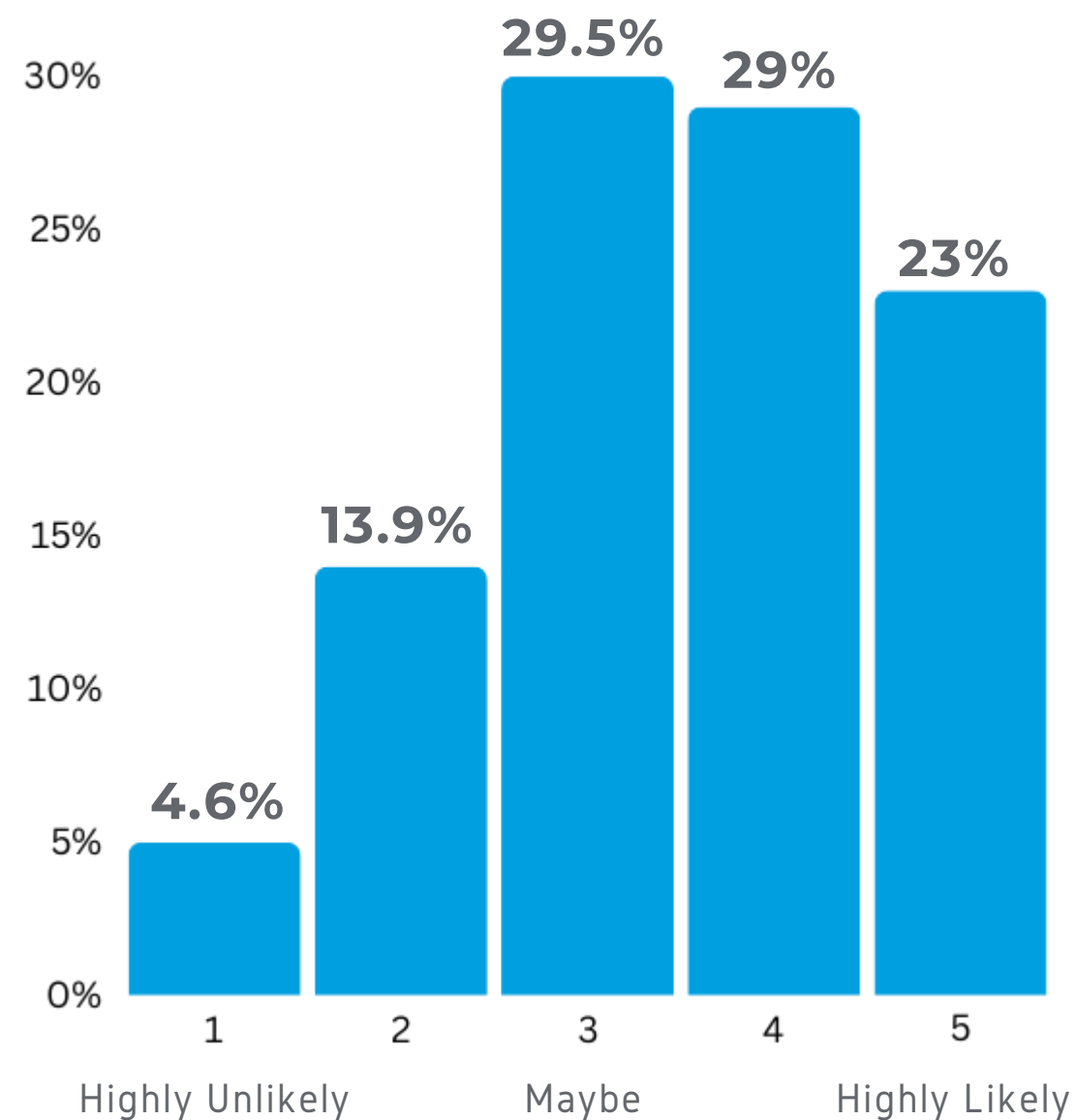
Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA UNDER THE CURRENT CONDITIONS YOU EXPERIENCED DURING THIS TRIP?



4.4 = HIGHLY LIKELY TO RETURN

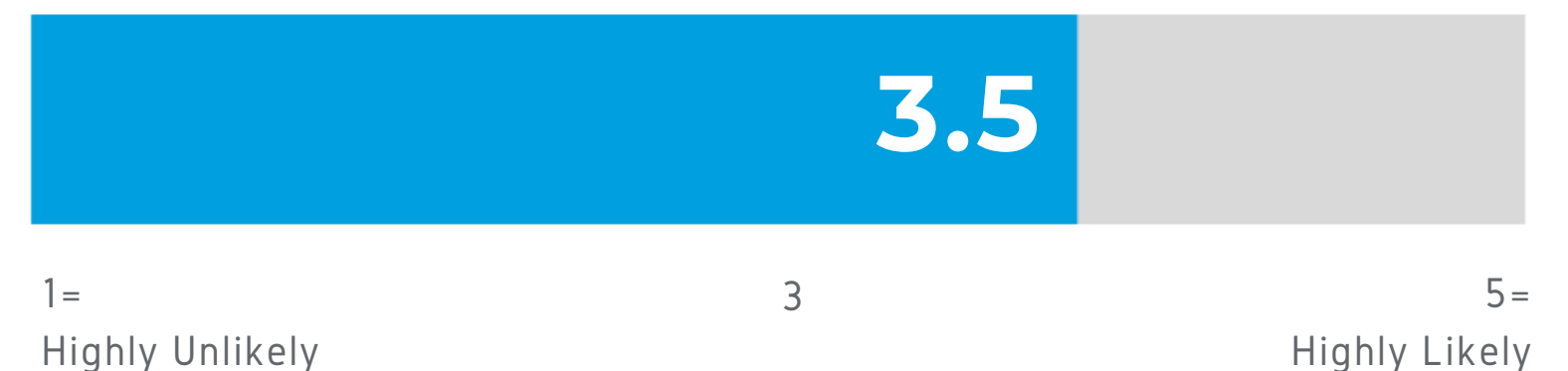
# LIKELIHOOD TO RETURN & CROWDEDNESS

Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA IF CONDITIONS ARE MORE CROWDED?



52% HIGHLY LIKELY TO RETURN IF CONDITIONS MORE CROWDED

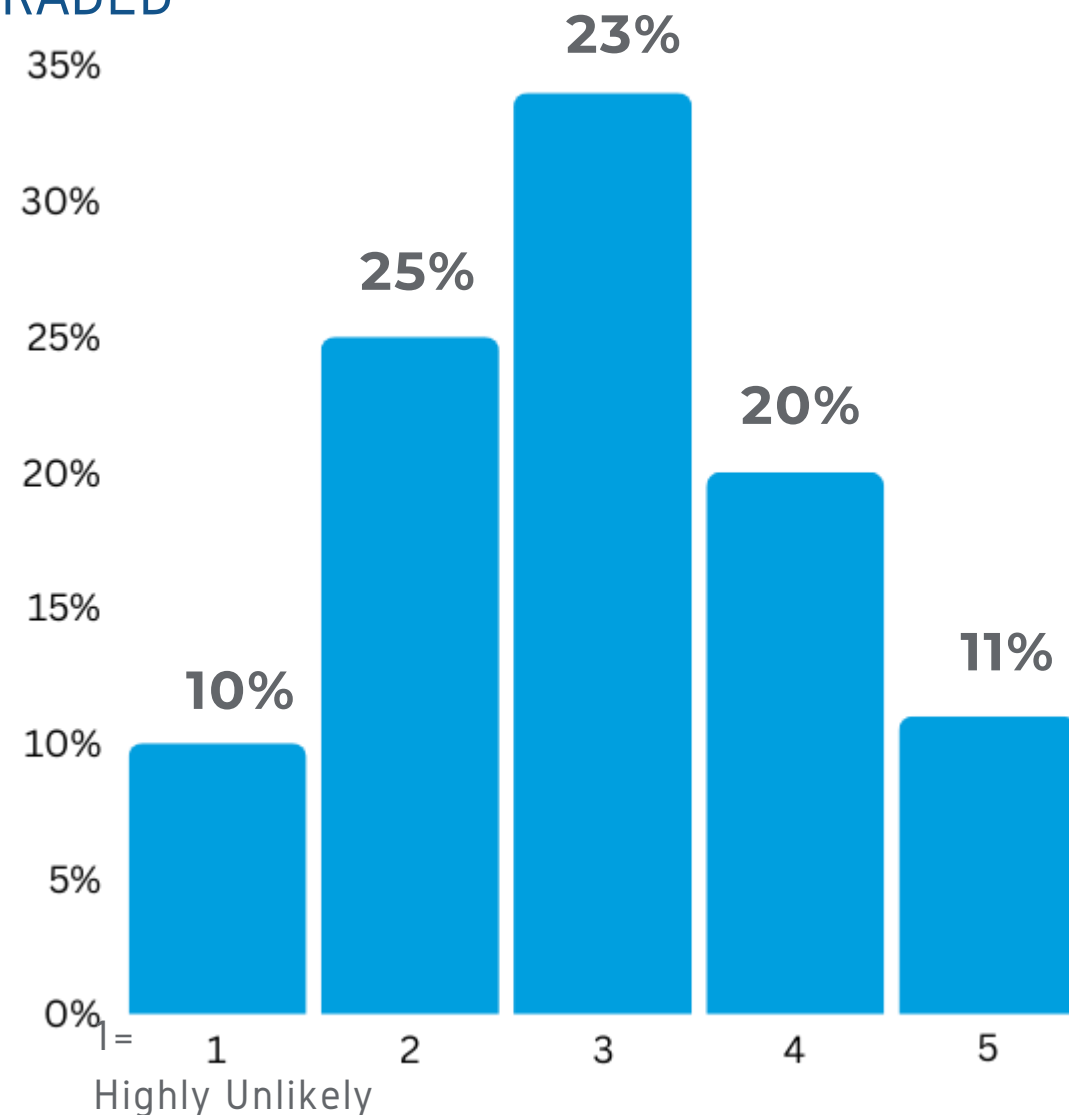
Q: HOW LIKELY ARE YOU TO RETURN TO ARUBA IF CONDITIONS ARE MORE CROWDED?



3.5 = LIKELY TO RETURN

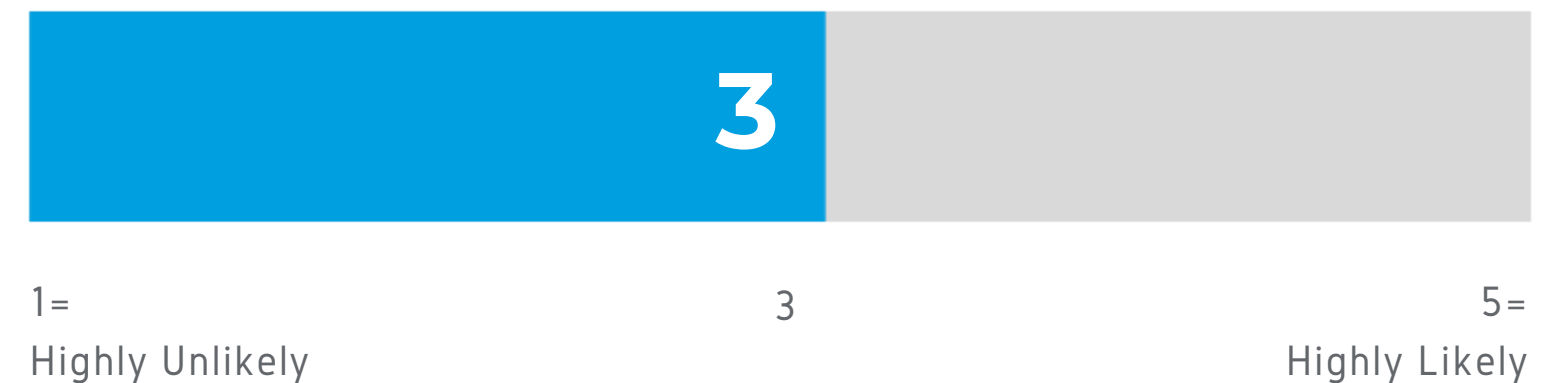
# LIKELIHOOD TO RETURN & ENVIRONMENT

Q: HOW LIKELY WILL YOU RETURN TO ARUBA IF THE ENVIRONMENTAL CONDITIONS YOU EXPERIENCED TODAY WERE MORE DEGRADED



35% HIGHLY UNLIKELY TO RETURN, WHILE 31% HIGHLY LIKELY TO RETURN IF CONDITIONS MORE DEGRADED

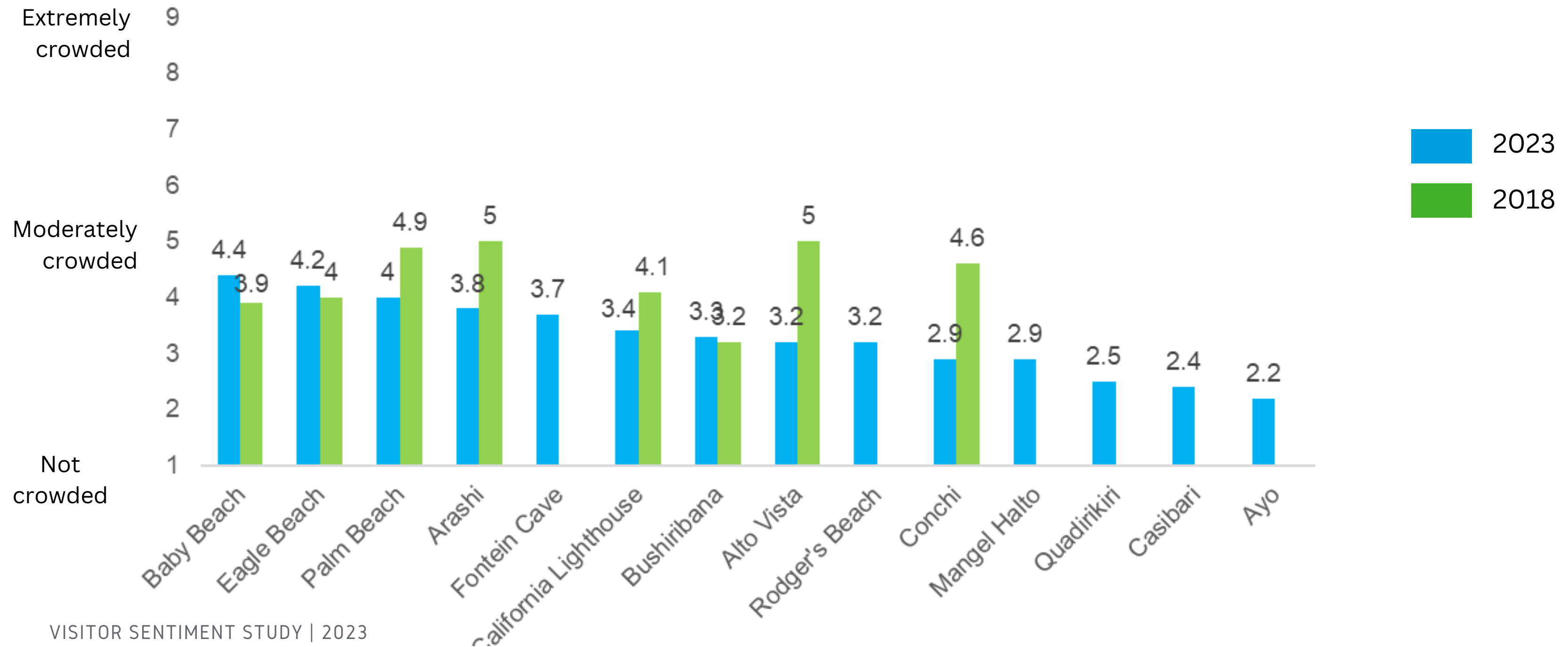
Q: HOW LIKELY WILL YOU RETURN TO ARUBA IF THE ENVIRONMENTAL CONDITIONS YOU EXPERIENCED TODAY WERE MORE DEGRADED



3.0 = MAYBE WILL RETURN

# CROWDEDNESS BY LOCATION

Q: PLEASE RATE THE LEVEL OF CROWDING YOU EXPERIENCED AT THIS LOCATION TODAY

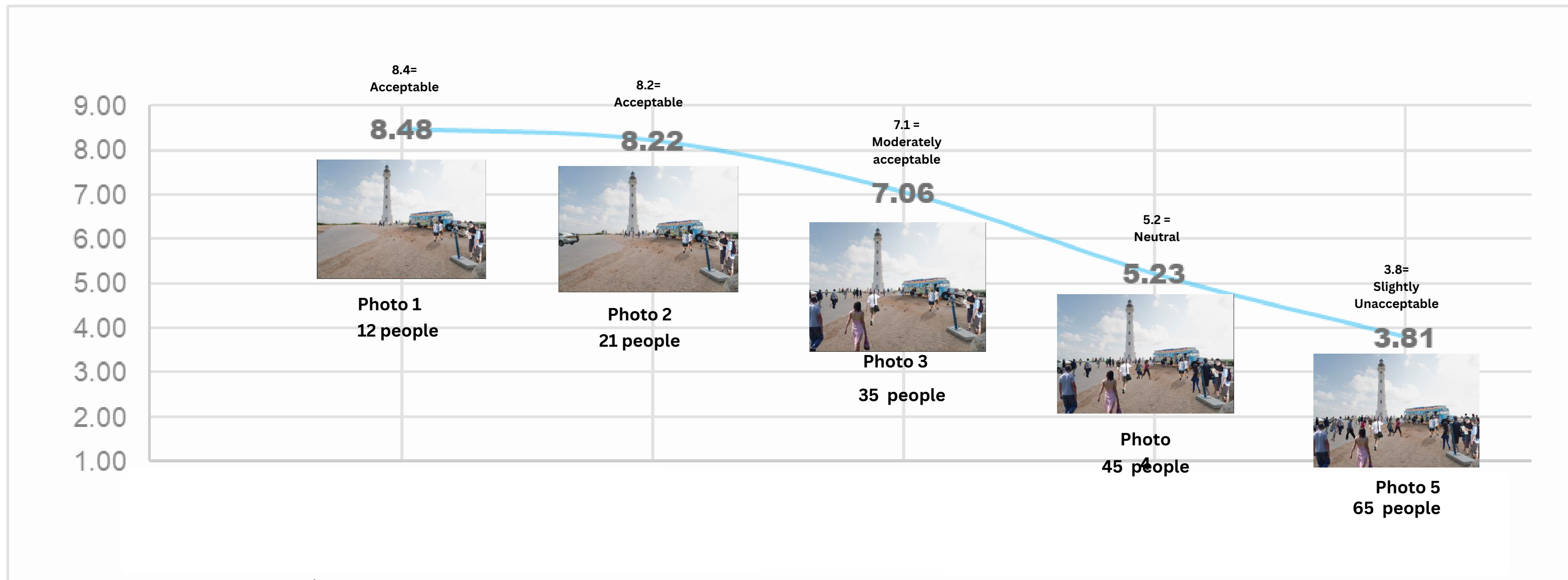




CALIFORNIA LIGHTHOUSE  
N=202

# CALIFORNIA LIGHTHOUSE

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE





# SITE EXPLANATION

## LINES COLOR:

 Demonstrate the number of people visitors indicated to have experienced today at the site (through pictures)

 Demonstrate the number of people visitors believe Aruba should take action to improve the location

 Demonstrate the number of people visitors believe are so unacceptable they would no longer use location

 Demonstrate the number of people visitors believe Aruba should allow

 Demonstrate the number of people visitors expected on the site



12 people



21 people



35 people

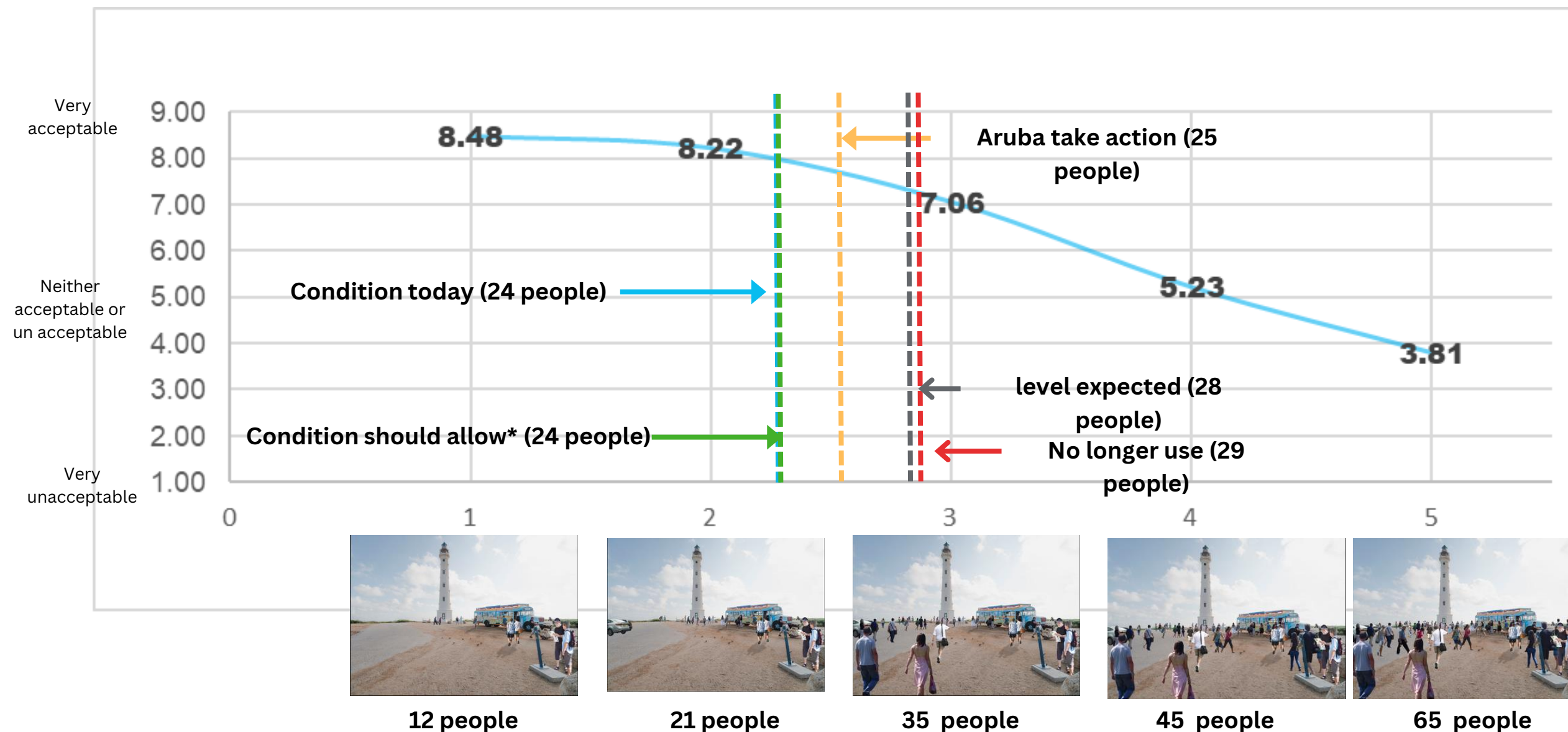


45 people



65 people

# CALIFORNIA LIGHTHOUSE



The average Mean of the condition experienced = 24 people  
 mean of condition expected 28 people

Tipping point: 24 -29 people\*

- 24% believe none of condition are so unacceptable that require action
- 48% believe none of conditions are so unacceptable that they would no longer come
- 48% believe none of conditions are so unacceptable or that visitors should be limited

# CALIFORNIA LIGHTHOUSE



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.4 =  
Not  
Crowded**

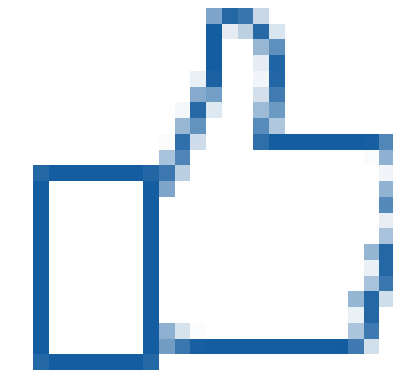
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**26.2%  
\$5 - \$20**

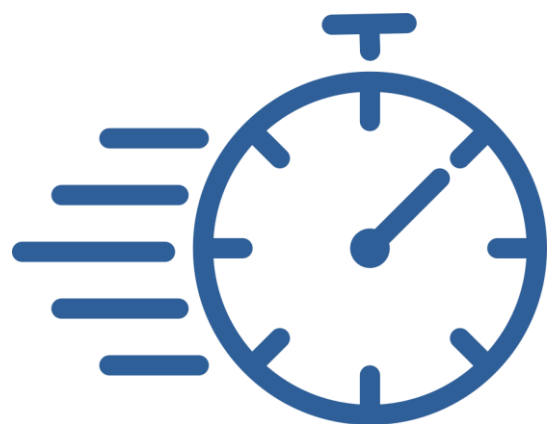
**\*35% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.5/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**42%  
20 Min**

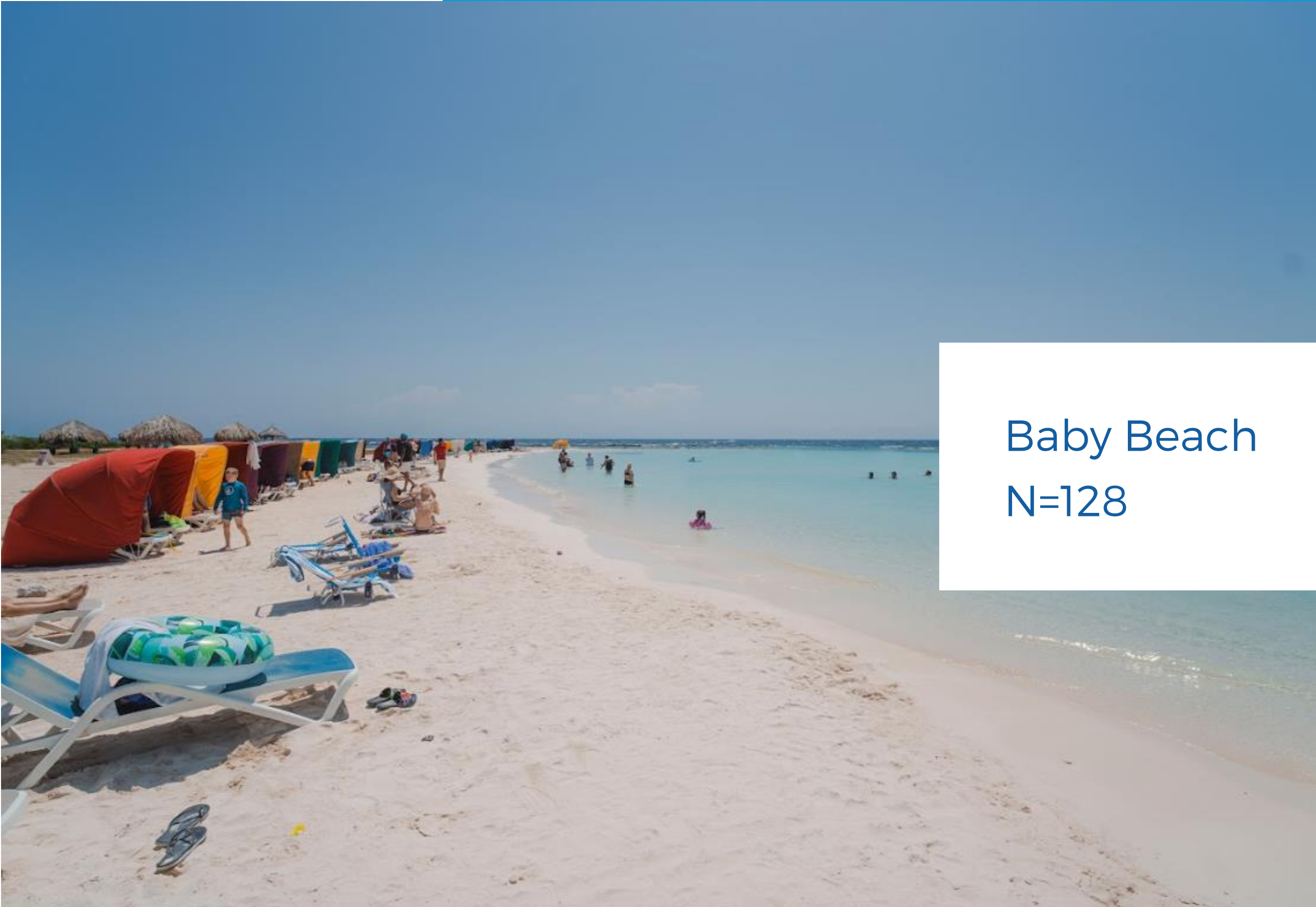
PLEASE SHARE WITH US ON WHICH COMPONENT:



**50%  
Food &  
Beverages**



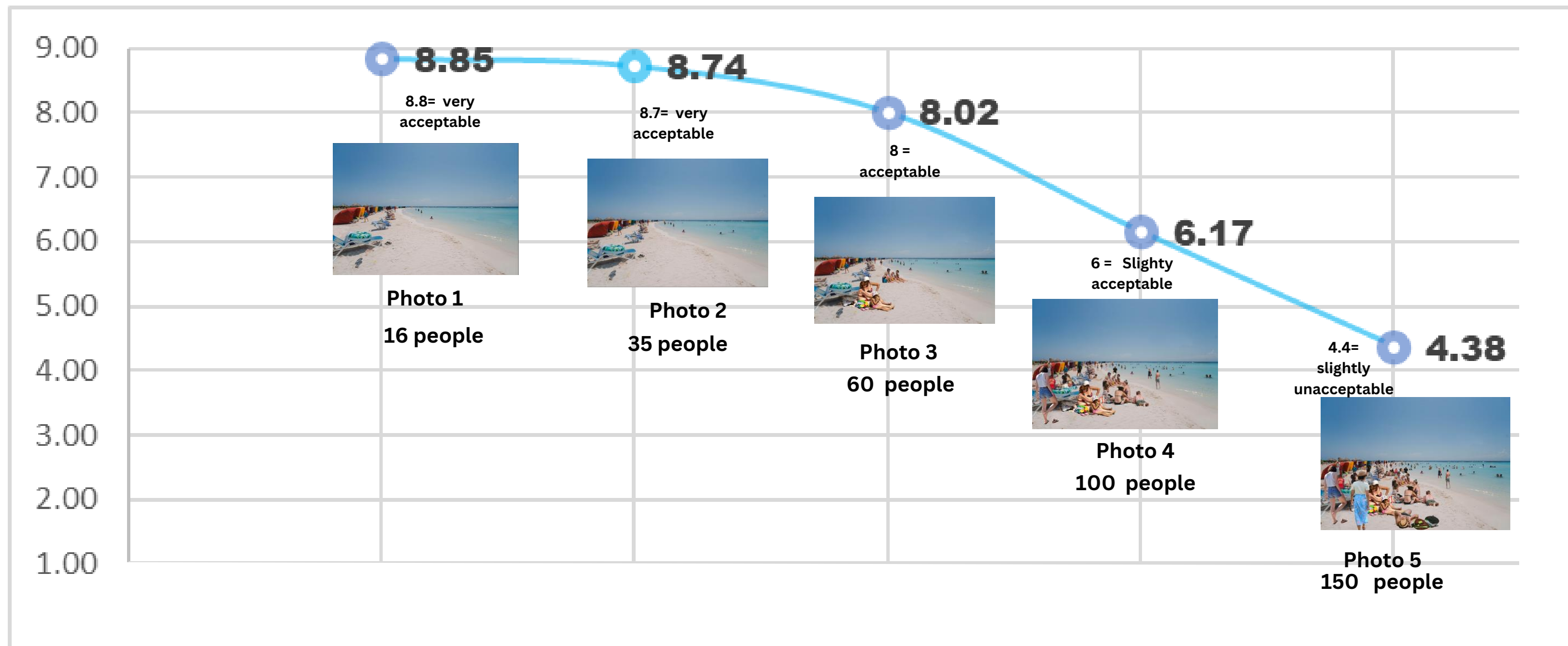
**11.4%  
Souvenirs**



Baby Beach  
N=128

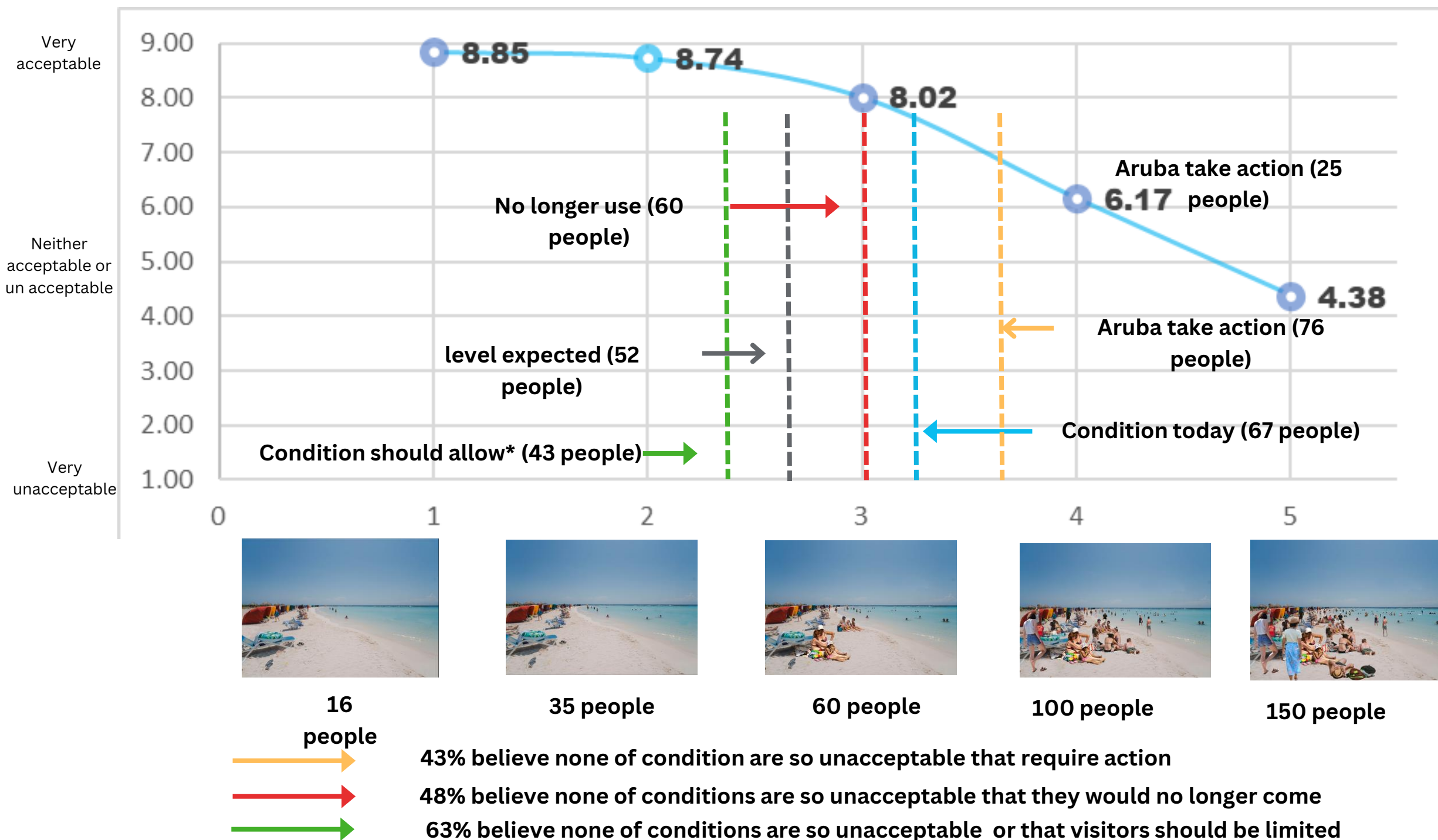
# BABY BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# BABY BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



Average Mean of condition experienced = 67 people is more than the mean of condition expected 52 people

Tipping point: 43 - 60 people\*

# BABY BEACH

PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**4.4 =  
Moderately  
crowded**

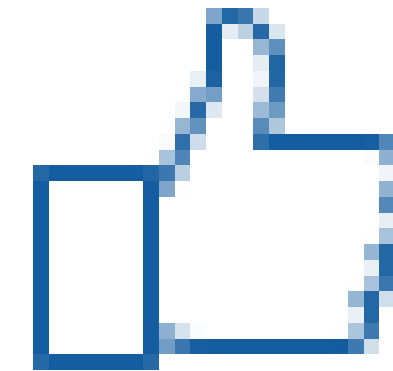
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**16%  
\$5- \$20**

**\*34% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.9/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**84%  
More than  
60 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**58%  
Food &  
Beverages**



**16%  
Beach  
chairs**



# LOCATIONS

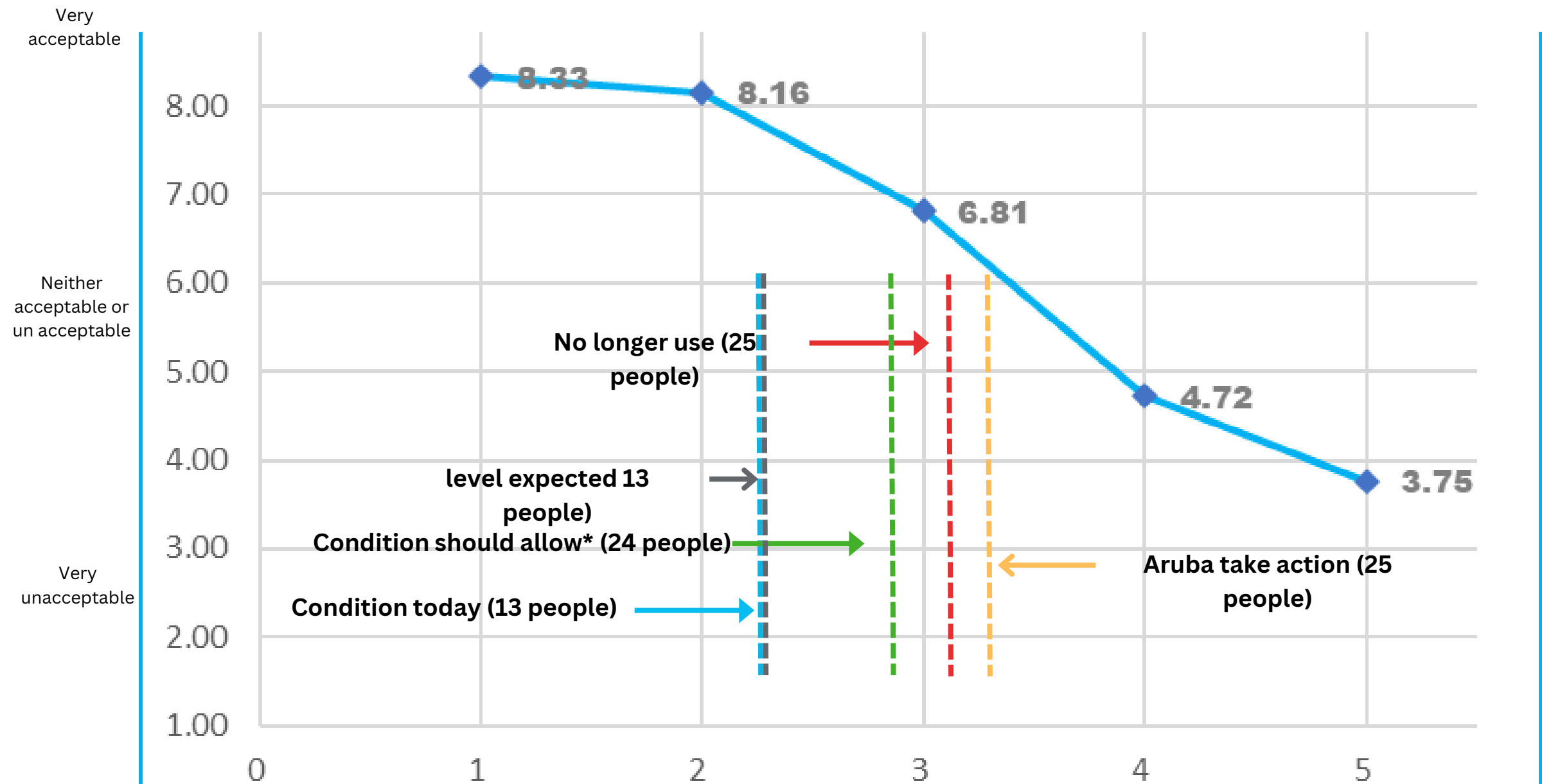


# ALTO VISTA

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# ALTO VISTA



The average Mean of condition experienced = 13 people is equal to the mean of condition expected 13 people

Tipping point: 13 -25 people\*

- 28% believe none of condition are so unacceptable that require action
- 40% believe none of conditions are so unacceptable that they would no longer come
- 29% believe none of conditions are so unacceptable or that visitors should be limited



0 people



10 people



20 people



40 people



50 people

# ALTO VISTA



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.4 =  
Not  
Crowded**

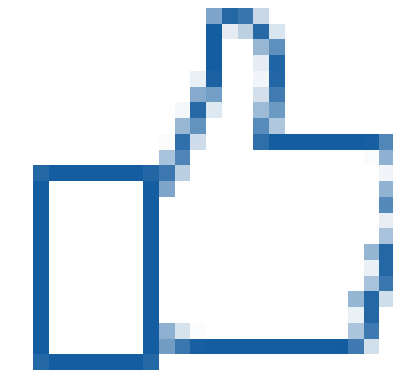
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**26.2%  
\$5- \$20**

**\*35% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.8/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**42%  
20 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**50%  
Food &  
Beverages**



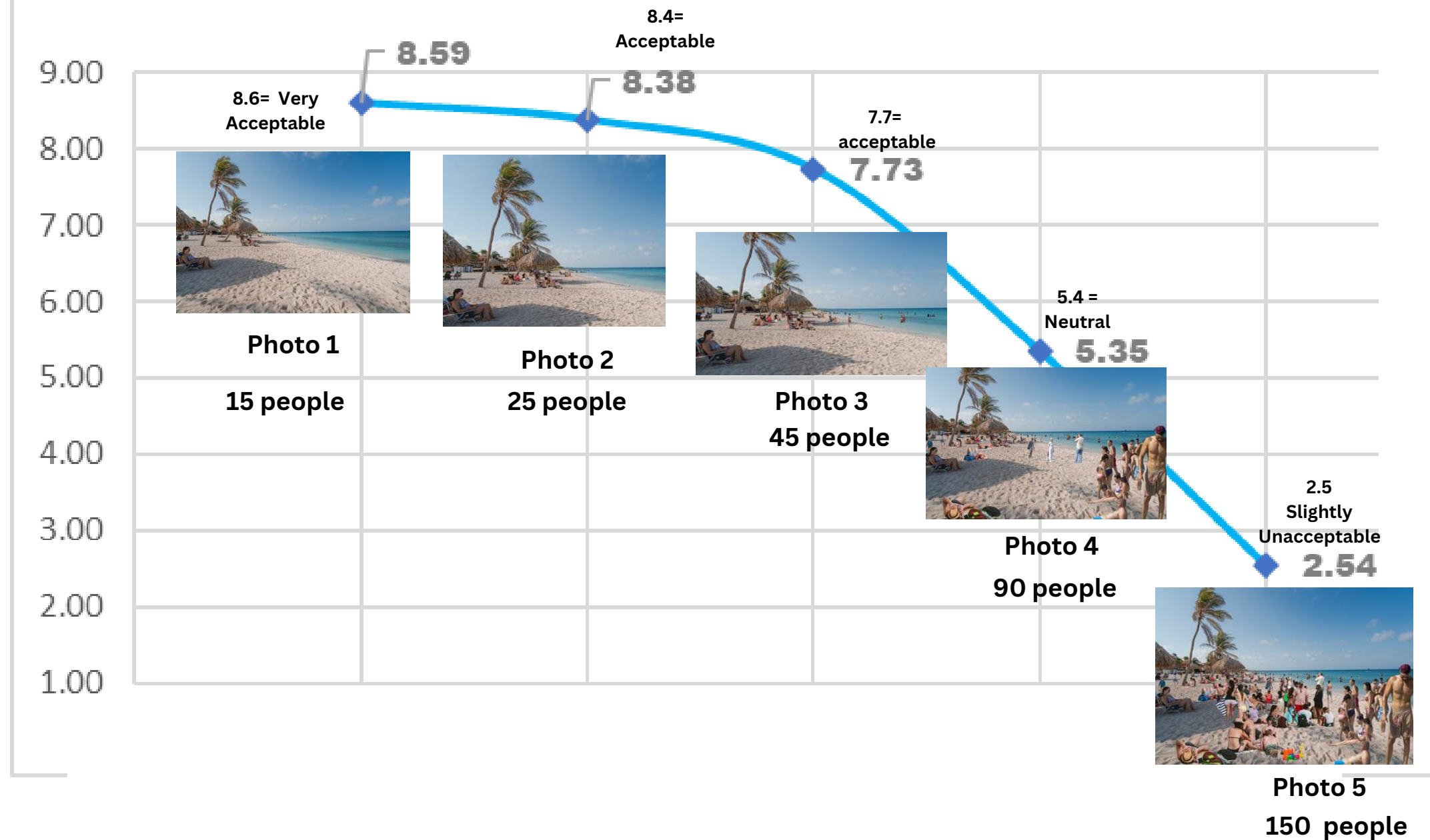
**11%  
Souvenirs**



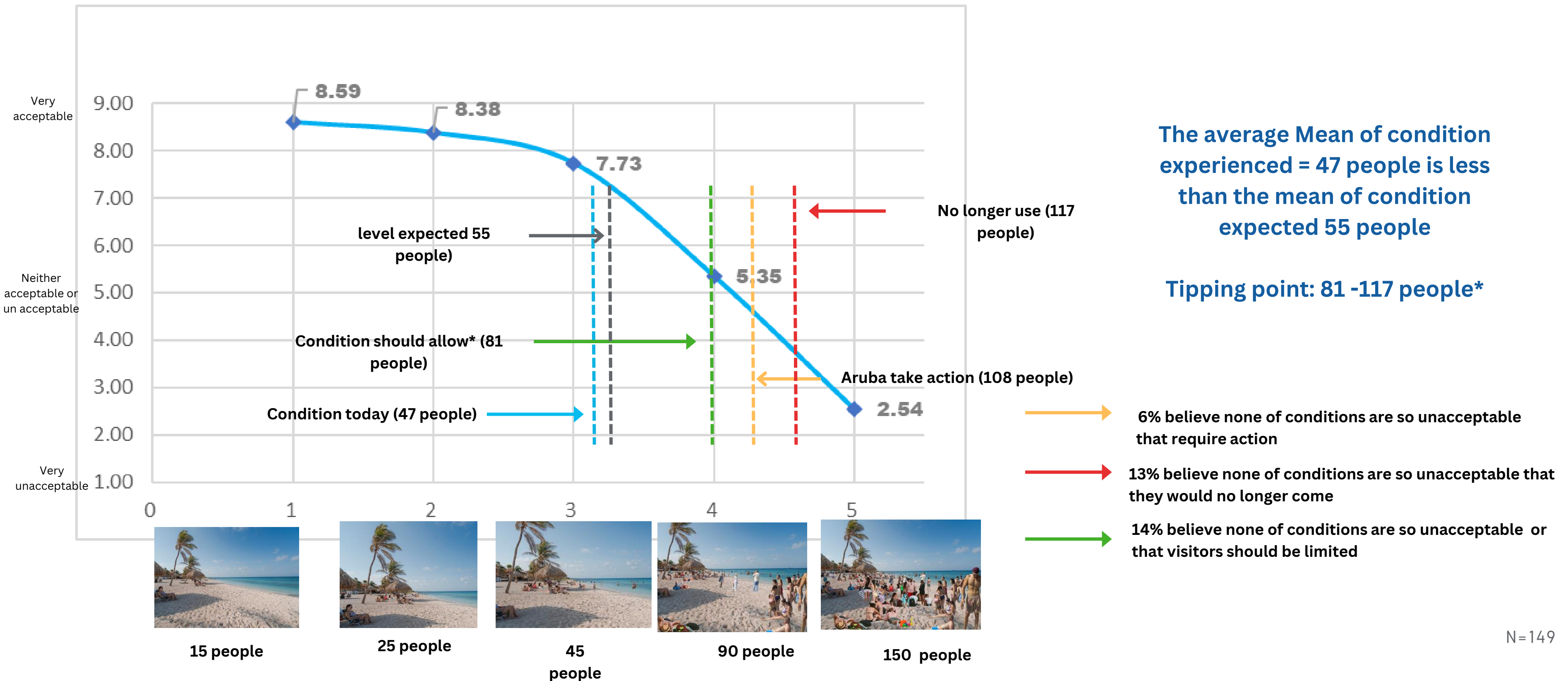
ARASHI Beach  
N= 149

# ARASHI BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# ARASHI BEACH



# ARASHI BEACH



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.8 = Moderately Crowded**

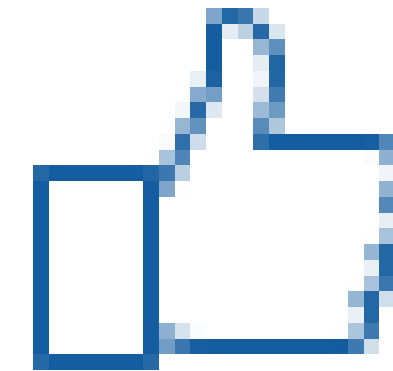
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**17% \$5- \$20**

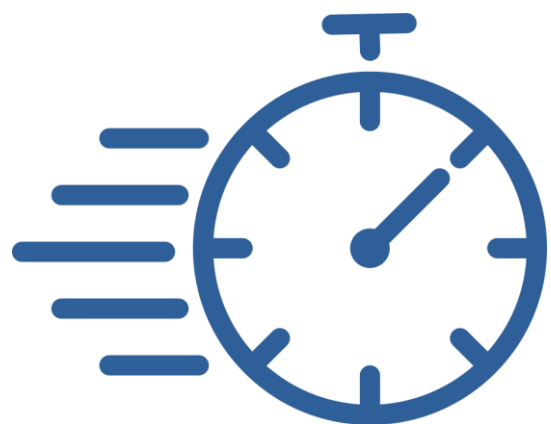
**\*20% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.7/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**64% More than 60 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**63% Food & Beverages**



**11% Beach chairs & Palapas**

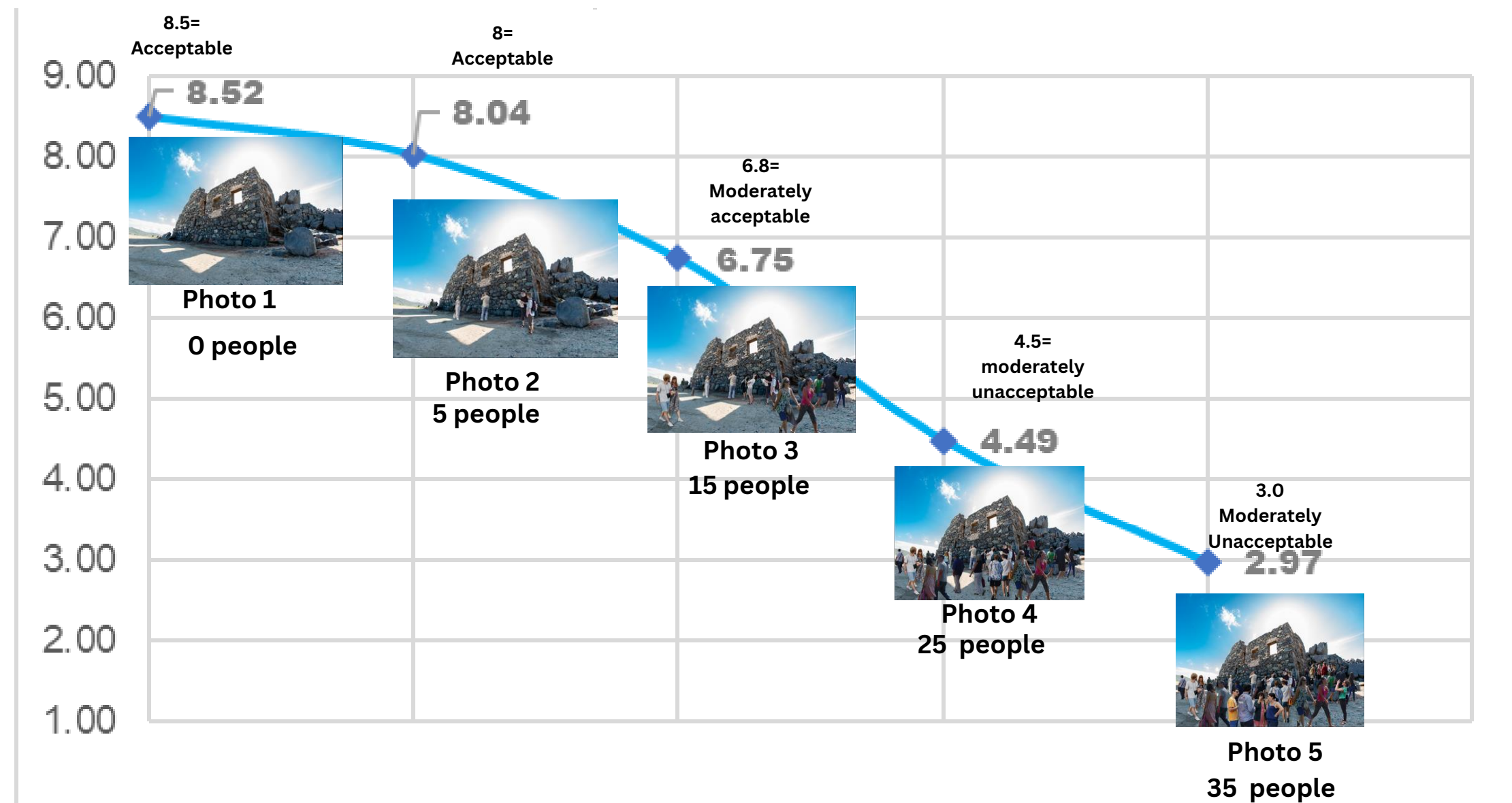


Bushiribana GoldMine  
N= 97

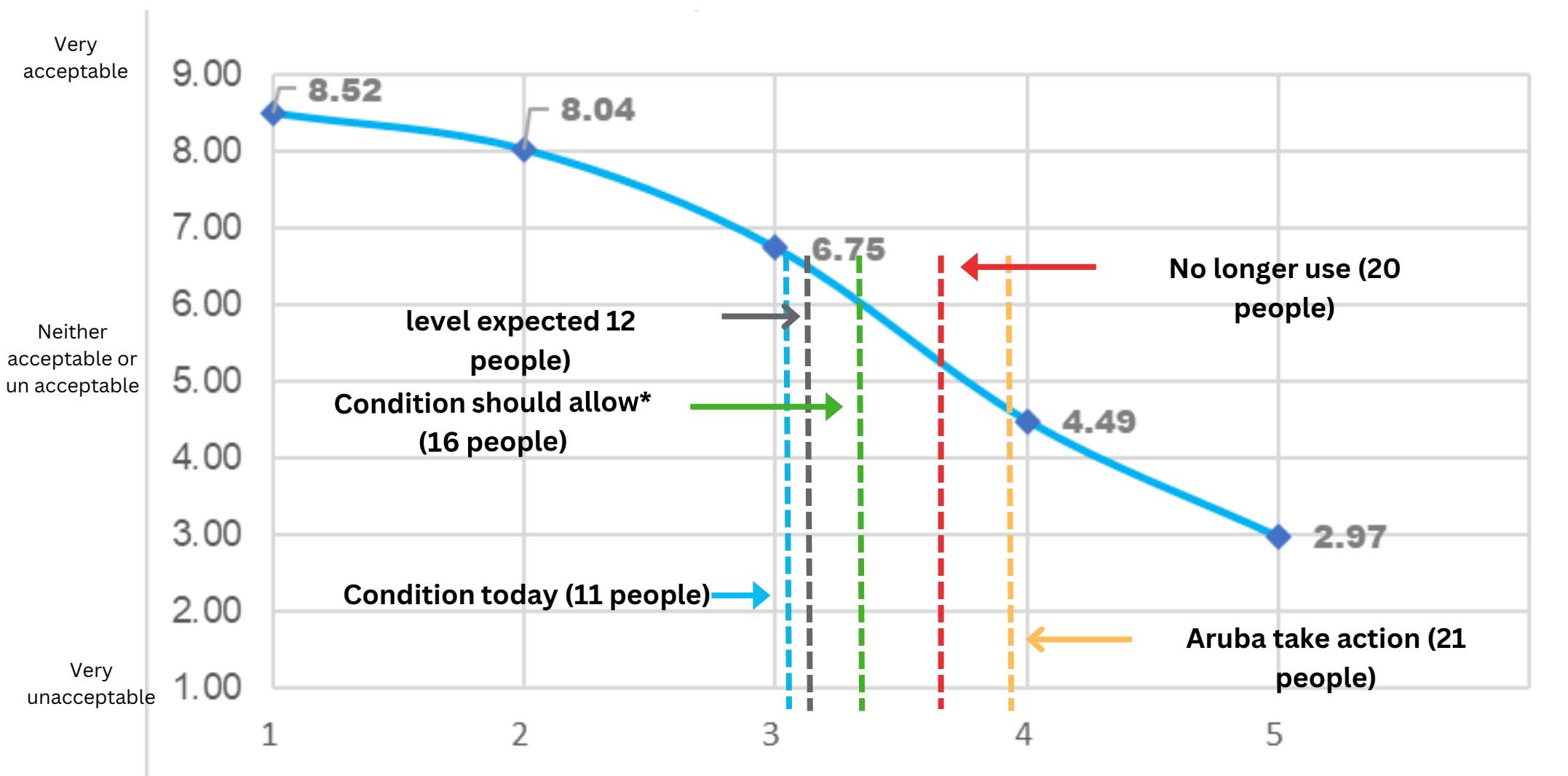


# BUSHIRIBANA

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# BUSHIRIBANA



The average Mean of condition experienced = 11 people is less than the mean of condition expected 12 people.  
Tipping point: 12 - 21 people\*



0 people      5 people      15 people      25 people      35 people

- 18% believe none of the conditions are so unacceptable that require action
- 27% believe none of conditions are so unacceptable that they would no longer come
- 33% believe none of the conditions are so unacceptable or that visitors should be limited

# BUSHIRIBANA



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.3 =  
Not  
Crowded**

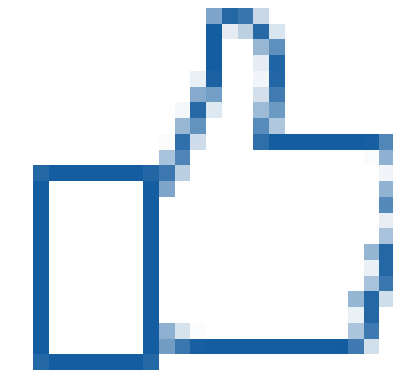
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**19%  
Less than  
\$5**

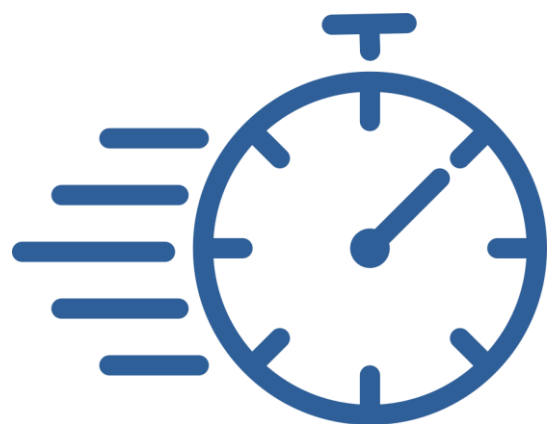
**\*59% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.1/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**46%  
Less than  
10 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



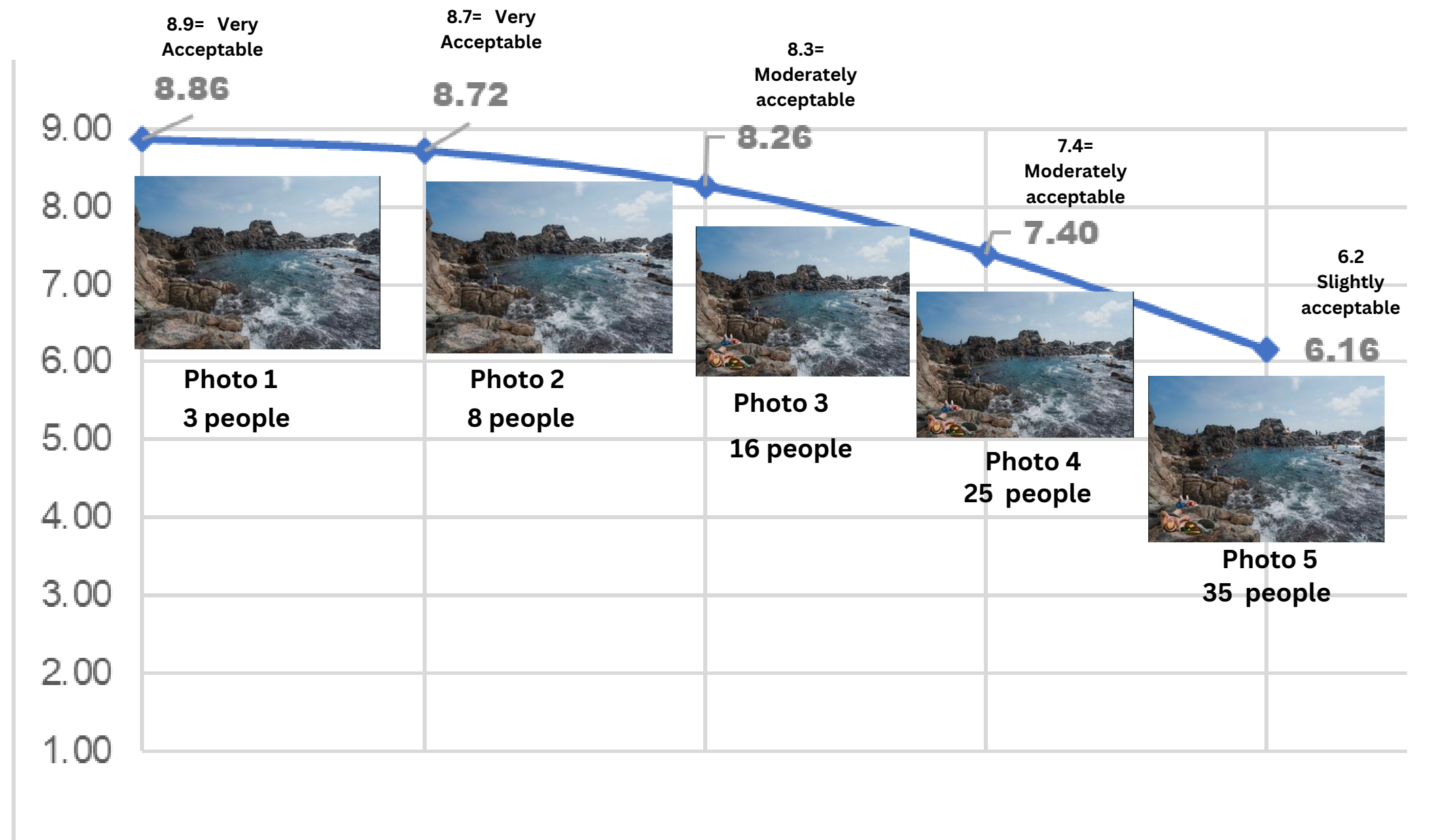
**32%  
Food &  
Beverages**



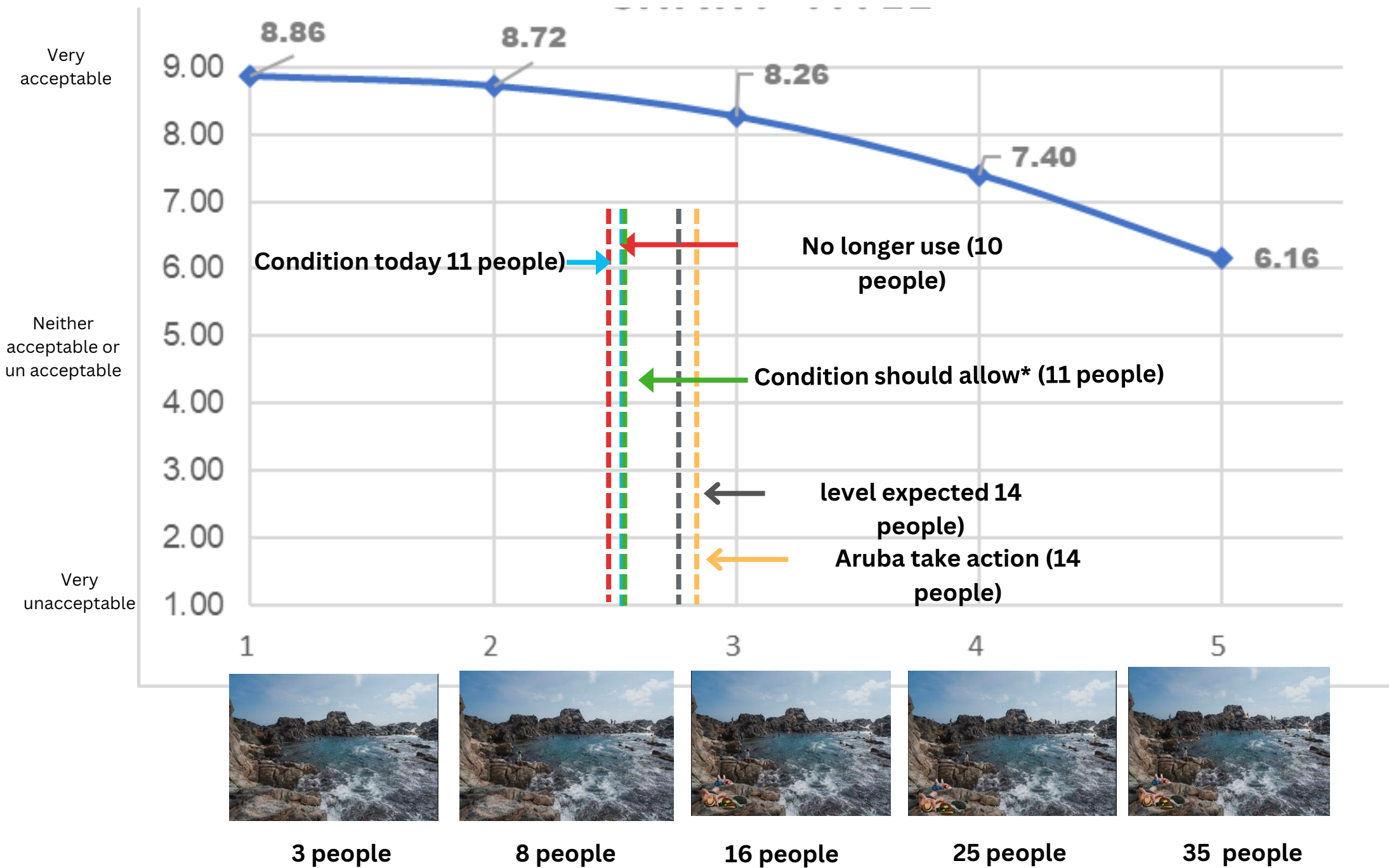
Conchi  
N= 103

# CONCHI

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# CONCHI



The average Mean of condition experienced = 11 people is less than the mean of condition expected 14 people

Tipping point: 11- 14 people\*

- 47% believe none of the conditions are so unacceptable that require action
- 62% believe none of conditions are so unacceptable that they would no longer come
- 60% believe none of the conditions are so unacceptable or that visitors should be limited

# CONCHI

PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**2.9 =  
Not  
Crowded**

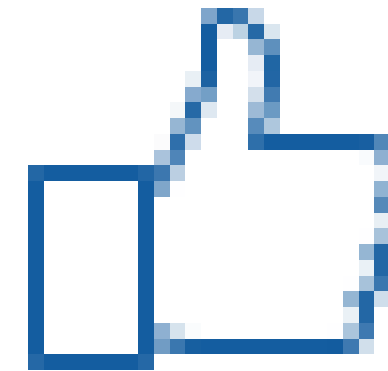
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**8%  
More than  
\$80**

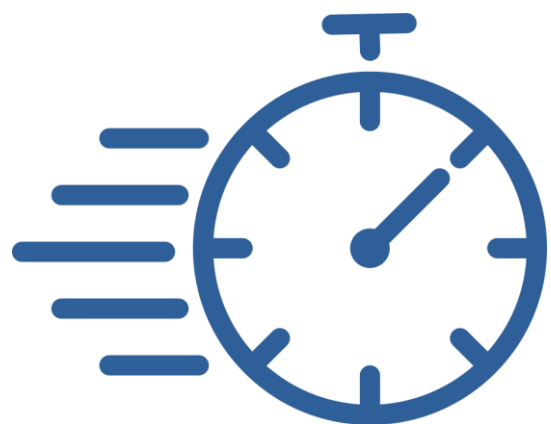
**8%  
Less than  
\$5**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.8/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**42%  
20 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**10%  
Food &  
Beverages**

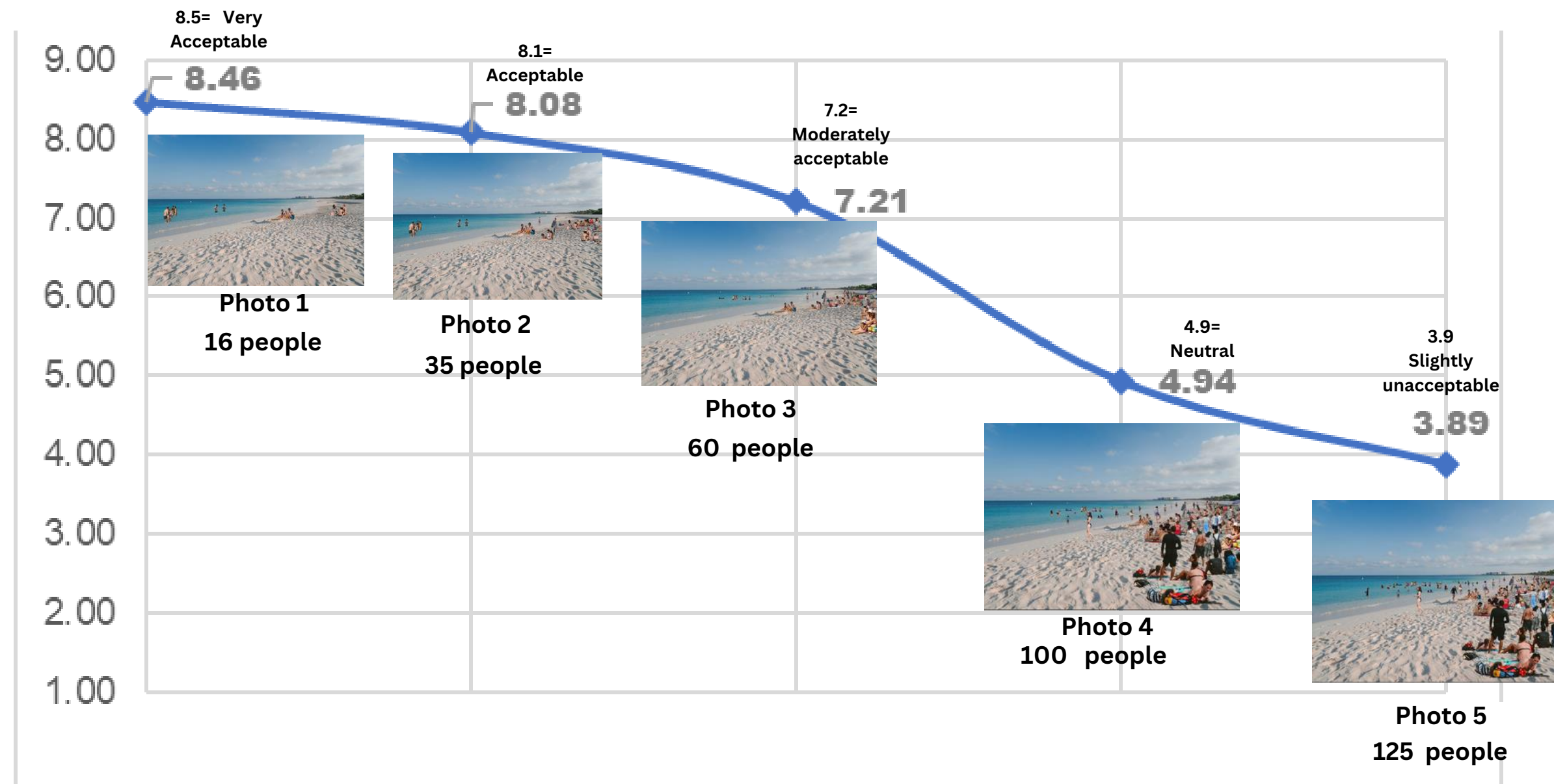


Eagle Beach  
N= 172

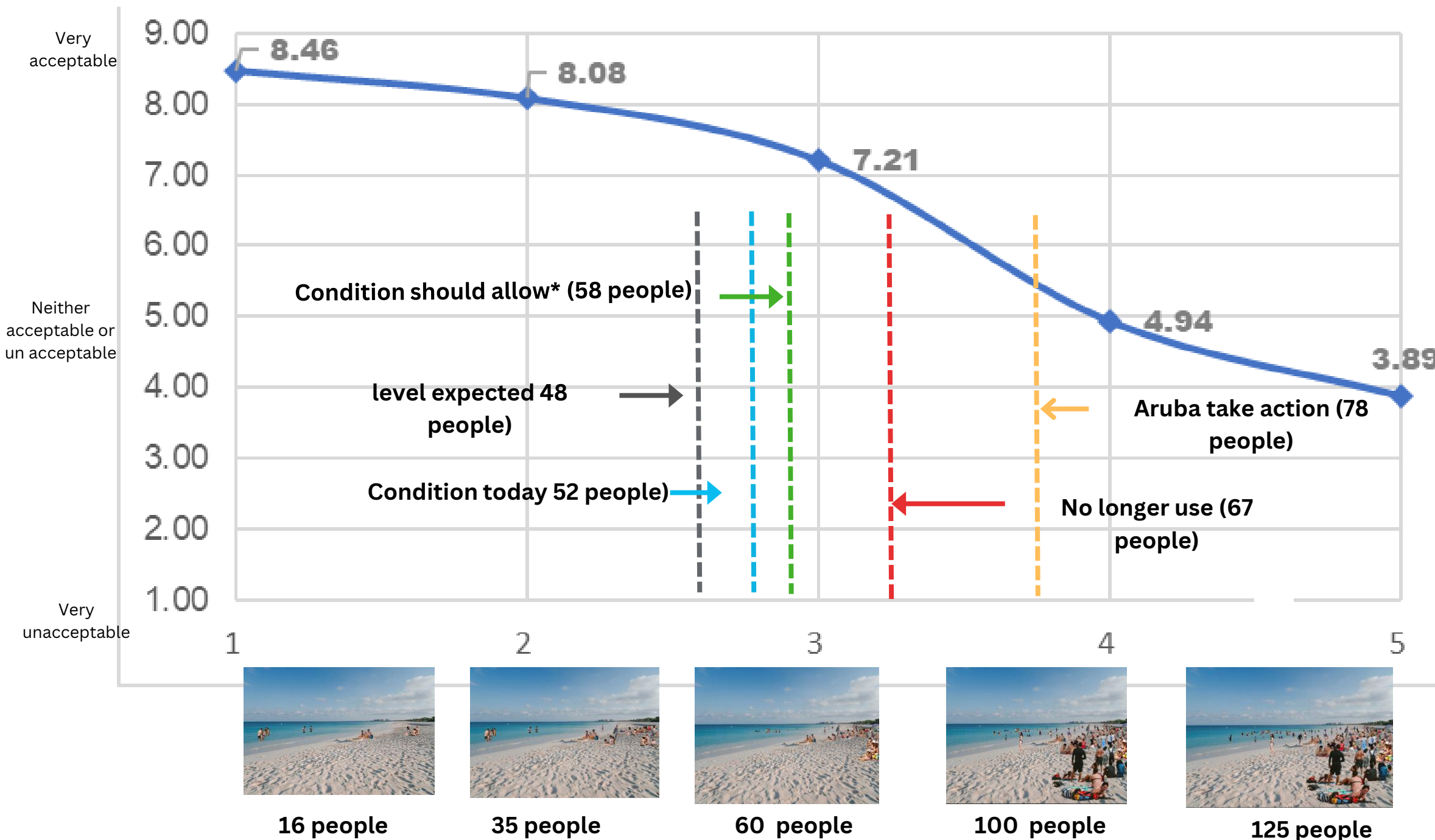


# EAGLE BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# EAGLE BEACH



The average Mean of condition experienced = 52 people is more than the mean of condition expected 48 people

Tipping point: 48- 78 people\*

- 28% believe none of the conditions are so unacceptable that require action
- 38% believe none of conditions are so unacceptable that they would no longer come
- 30% believe none of the conditions are so unacceptable or that visitors should be limited

# EAGLE BEACH



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**4.1 = Moderately Crowded**

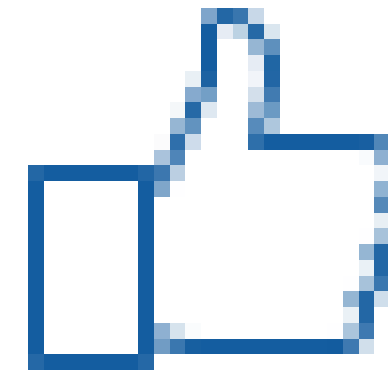
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**19% Less than \$5**

**\*34% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.8/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**89% More than 60 minutes**

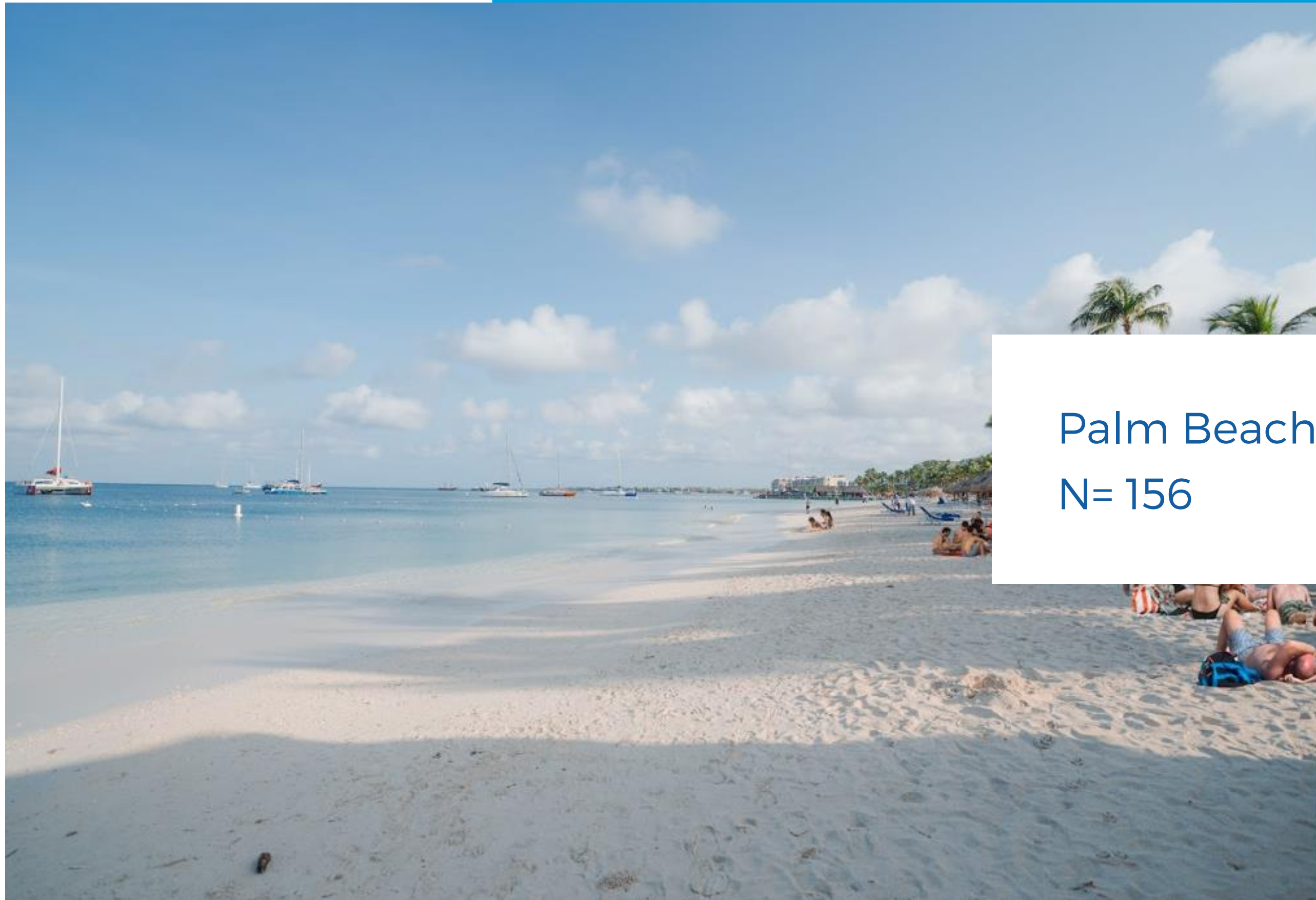
PLEASE SHARE WITH US ON WHICH COMPONENT:



**47% Food & Beverages**



**21% Beach Chairs**



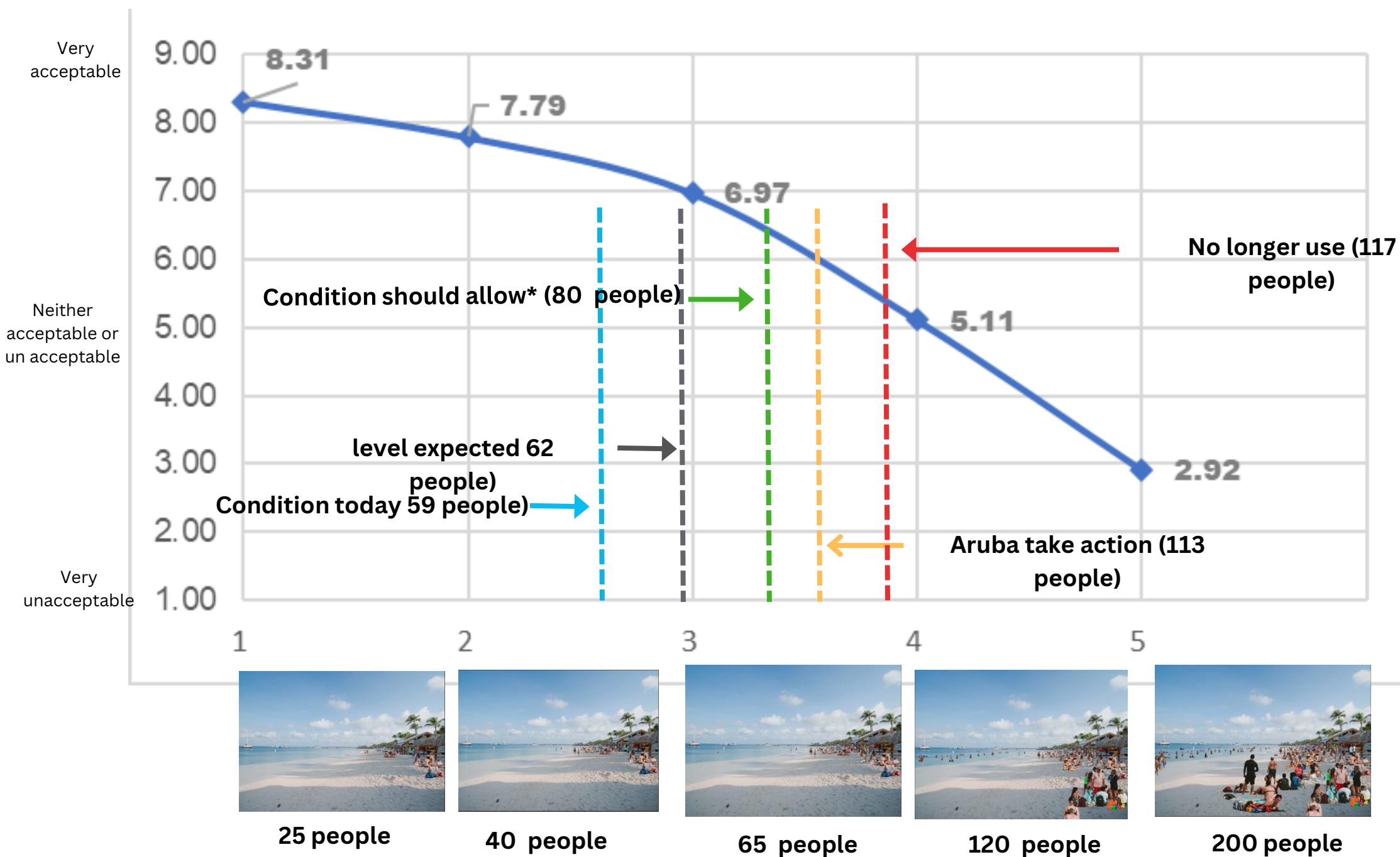
Palm Beach  
N= 156

# PALM BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# PALM BEACH



The average Mean of condition experienced = 59 people is less than the mean of condition expected 62 people

Tipping point: 80- 117 people\*

- 25% believe none of the conditions are so unacceptable that require action
- 36% believe none of conditions are so unacceptable that they would no longer come
- 37% believe none of the conditions are so unacceptable or that visitors should be limited

# PALM BEACH



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**4=**  
**Moderately crowded**

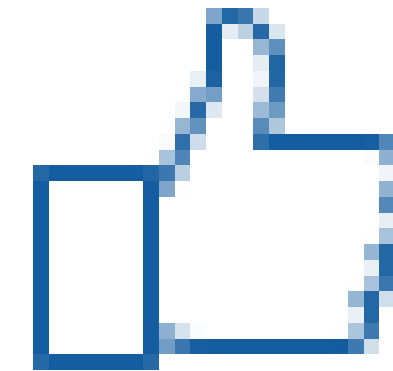
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**24%**  
**More than \$80**

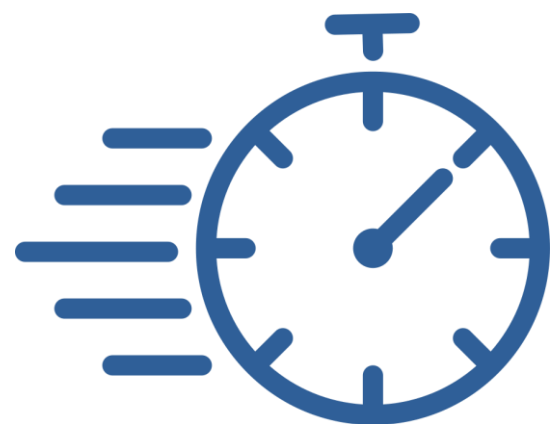
**\*19% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.9/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**82%**  
**More than 60 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**65%**  
**Food & Beverages**



**13%**  
**Beach Chairs**



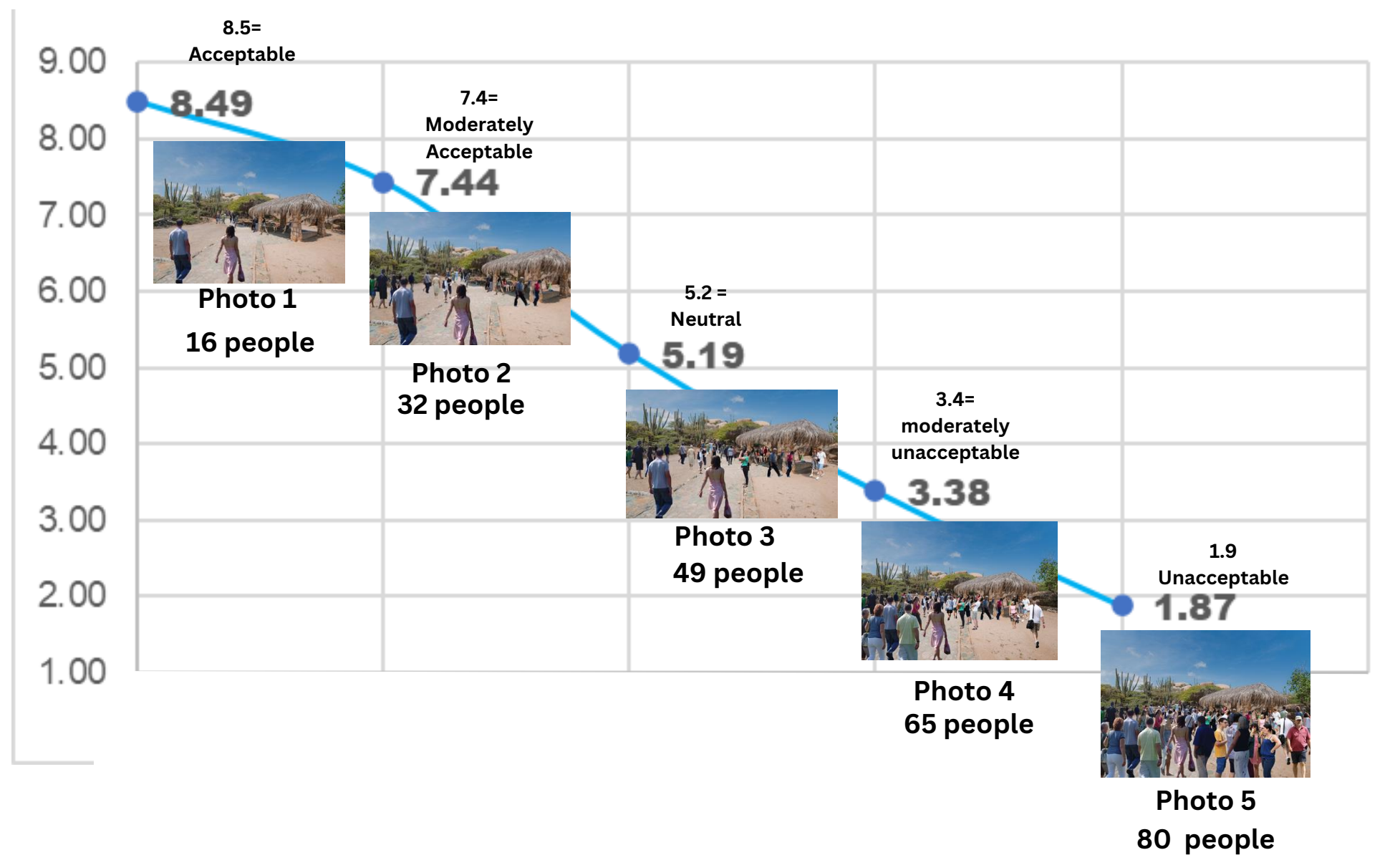
AYO

N= 79

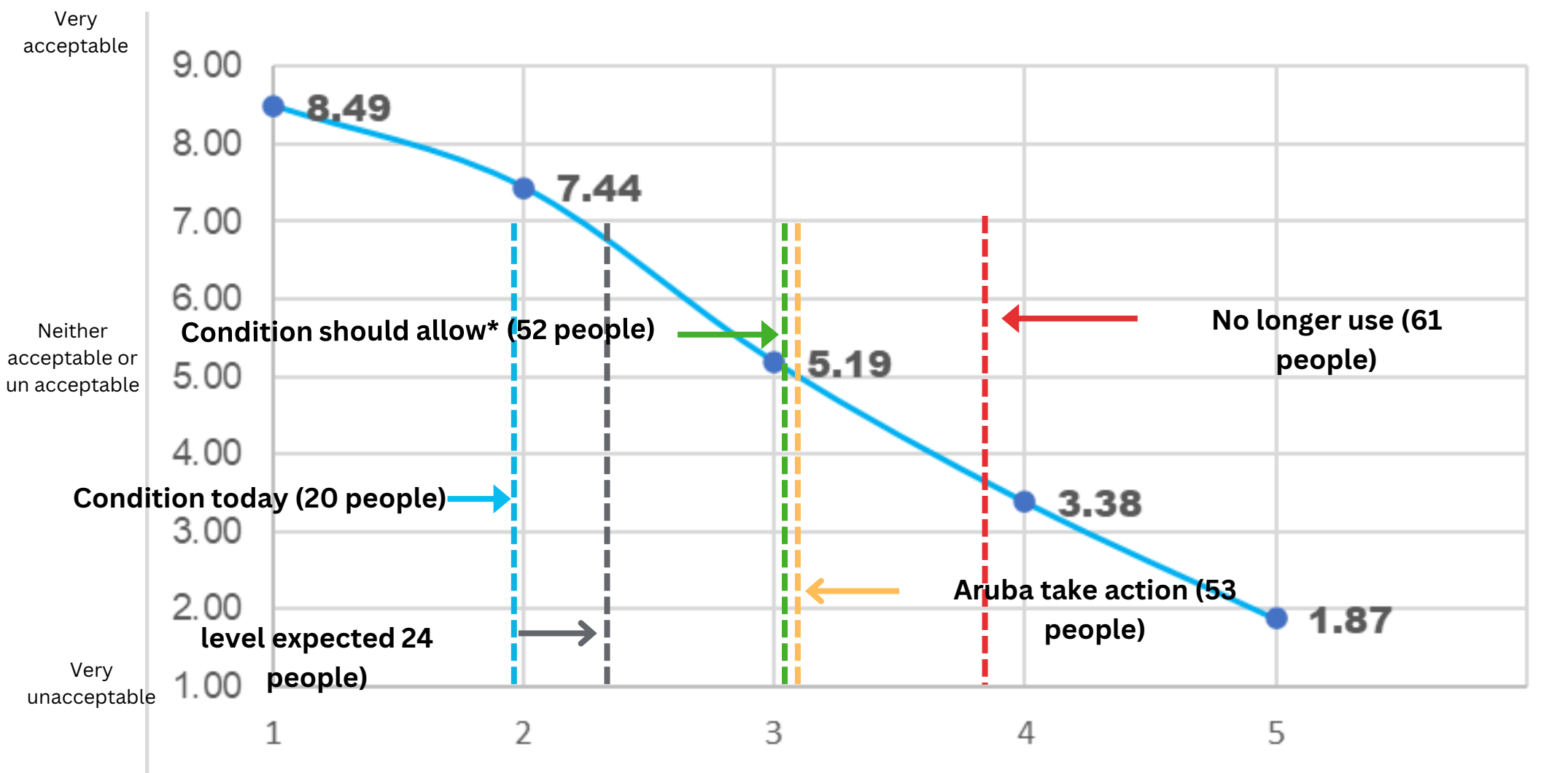


# AYO

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# AYO



16 people      32 people      49 people      65 people      80 people

The average Mean of condition experienced = 20 people is less than the mean of condition expected 24 people

Tipping point: 52 -61 people\*

- 3% believe none of the conditions are so unacceptable that require action
- 3.8% believe none of conditions are so unacceptable that they would no longer come
- 5.1% believe none of conditions are so unacceptable or that visitors should be limited

PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**2.2 =  
Not  
Crowded**

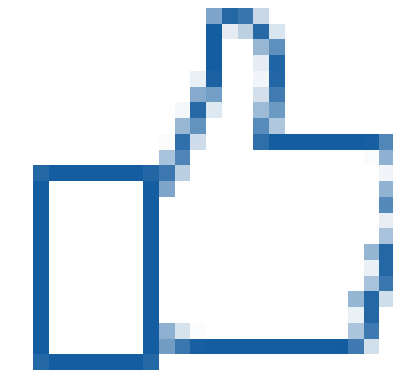
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**28%  
Less than  
\$5**

**\*70% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.3/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**34%  
20 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**14%  
Food &  
Beverages**



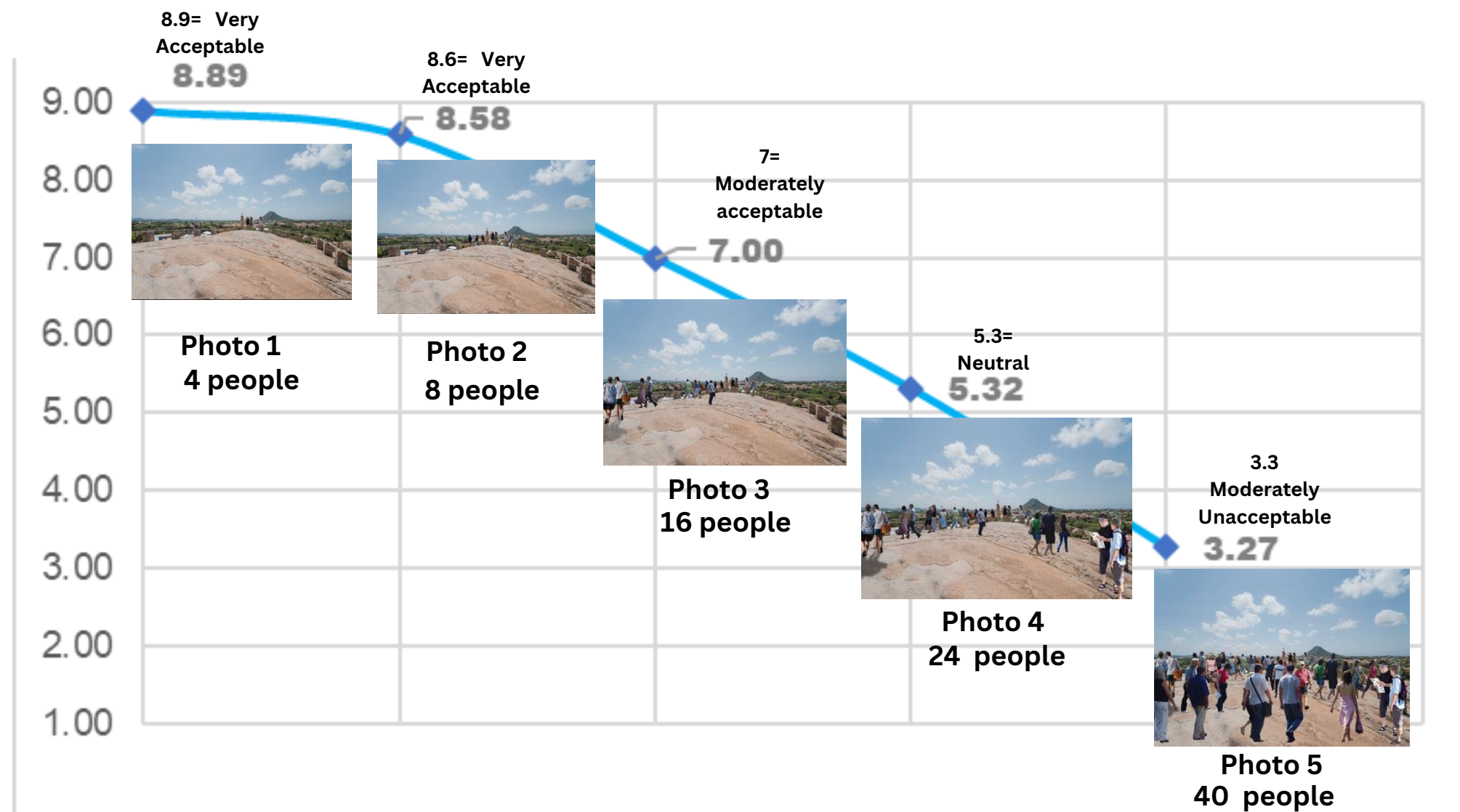
**4%  
Souvenirs**



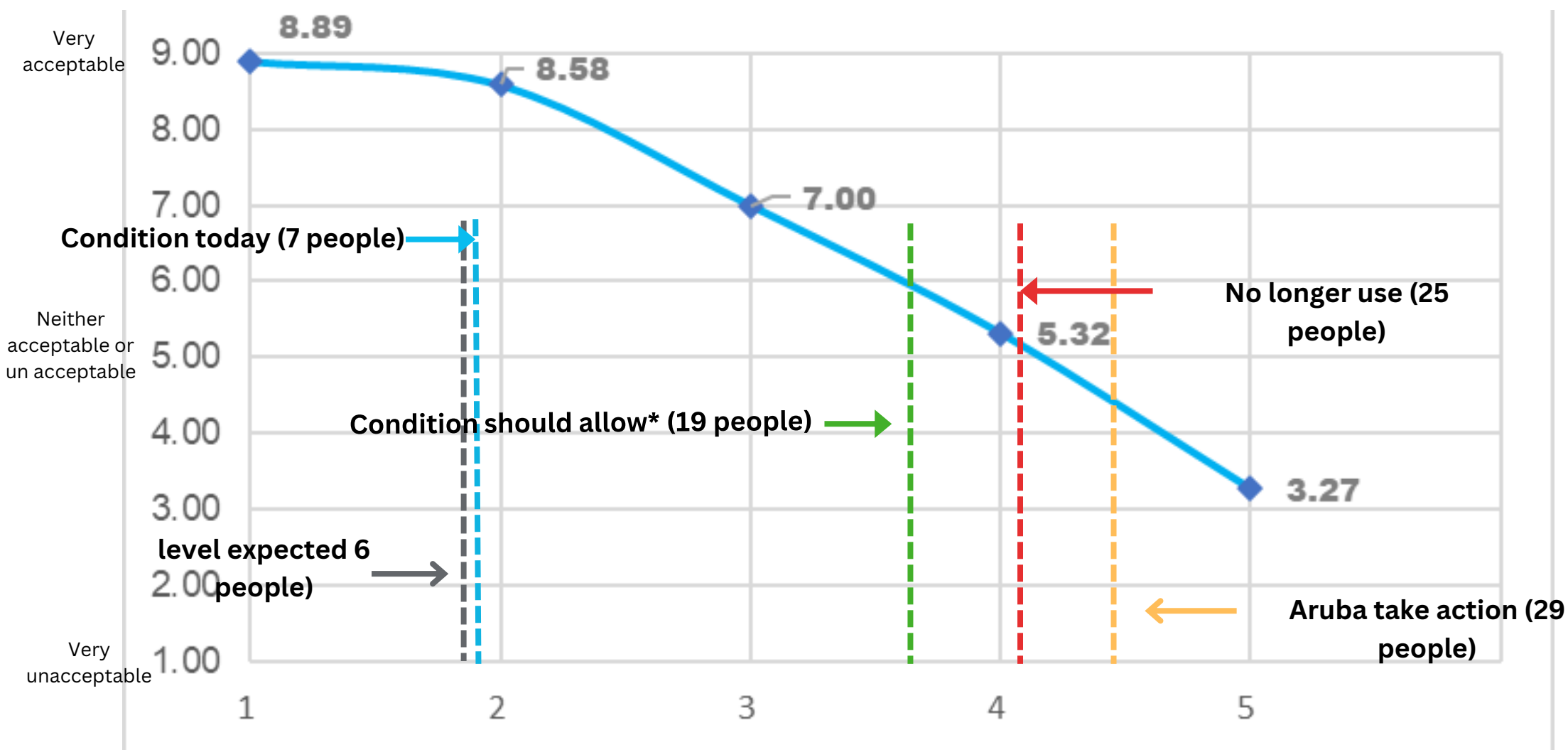
Casibari  
N= 76

# CASIBARI

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# CASIBARI



The average Mean of condition experienced = 7 people is more than the mean of condition expected 6 people

Tipping point: 19 - 29 people\*

- 9% believe none of the conditions are so unacceptable that require action**
- 21% believe none of conditions are so unacceptable that they would no longer come**
- 21% believe none of the conditions are so unacceptable or that visitors should be limited**



4 people      8 people      16 people      24 people      40 people

# CASIBARI



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**2.4 =  
Not  
Crowded**

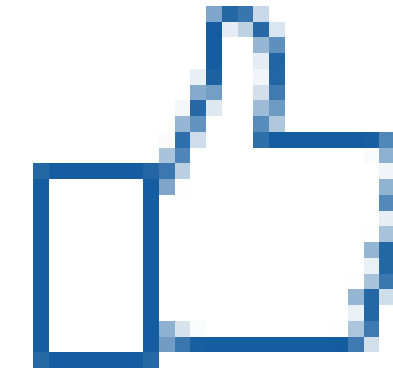
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**16%  
\$5-\$20**

**\*76% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.6/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**53%  
20 Min**

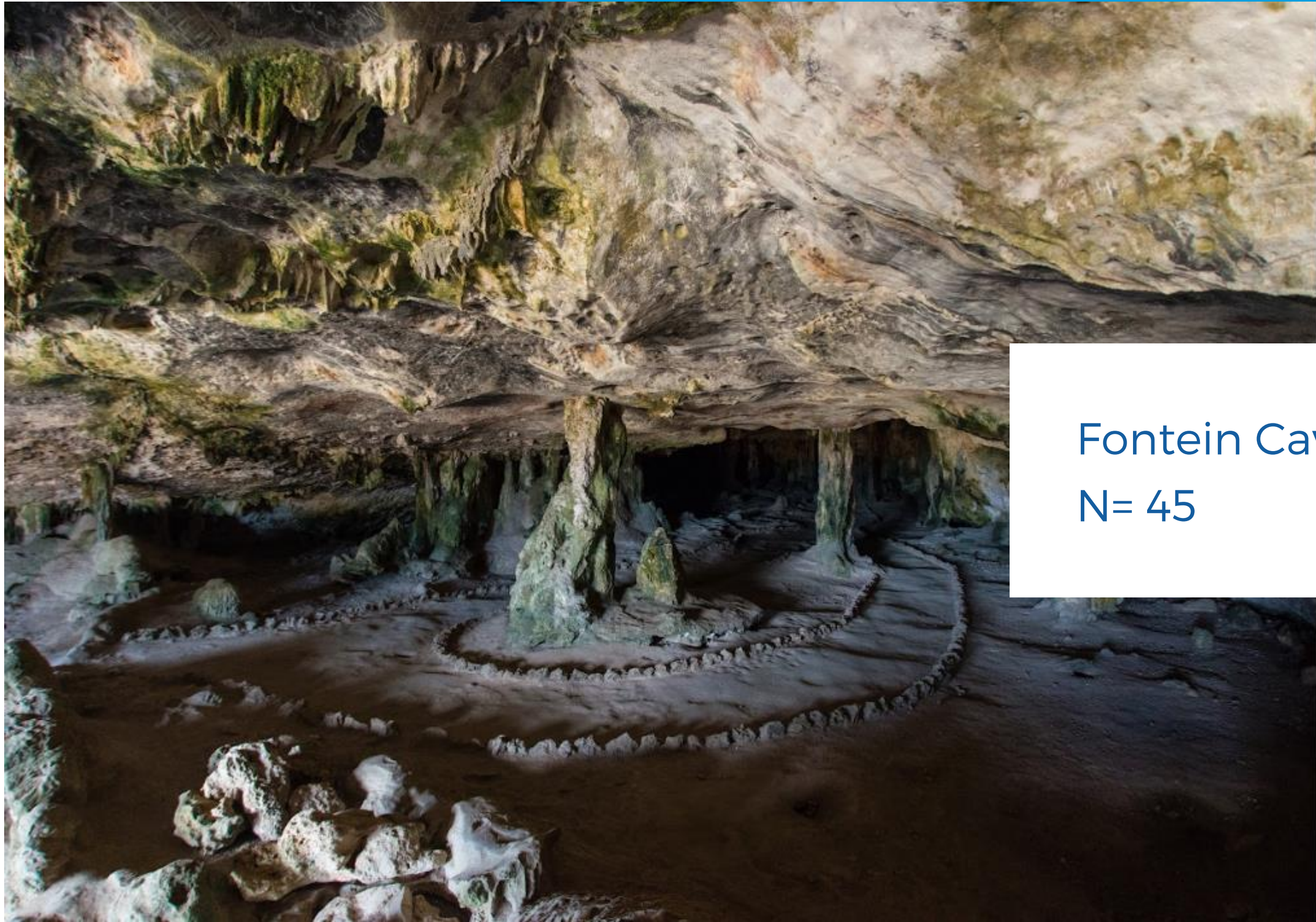
PLEASE SHARE WITH US ON WHICH COMPONENT:



**17%  
Food &  
Beverages**



**79%  
Other**

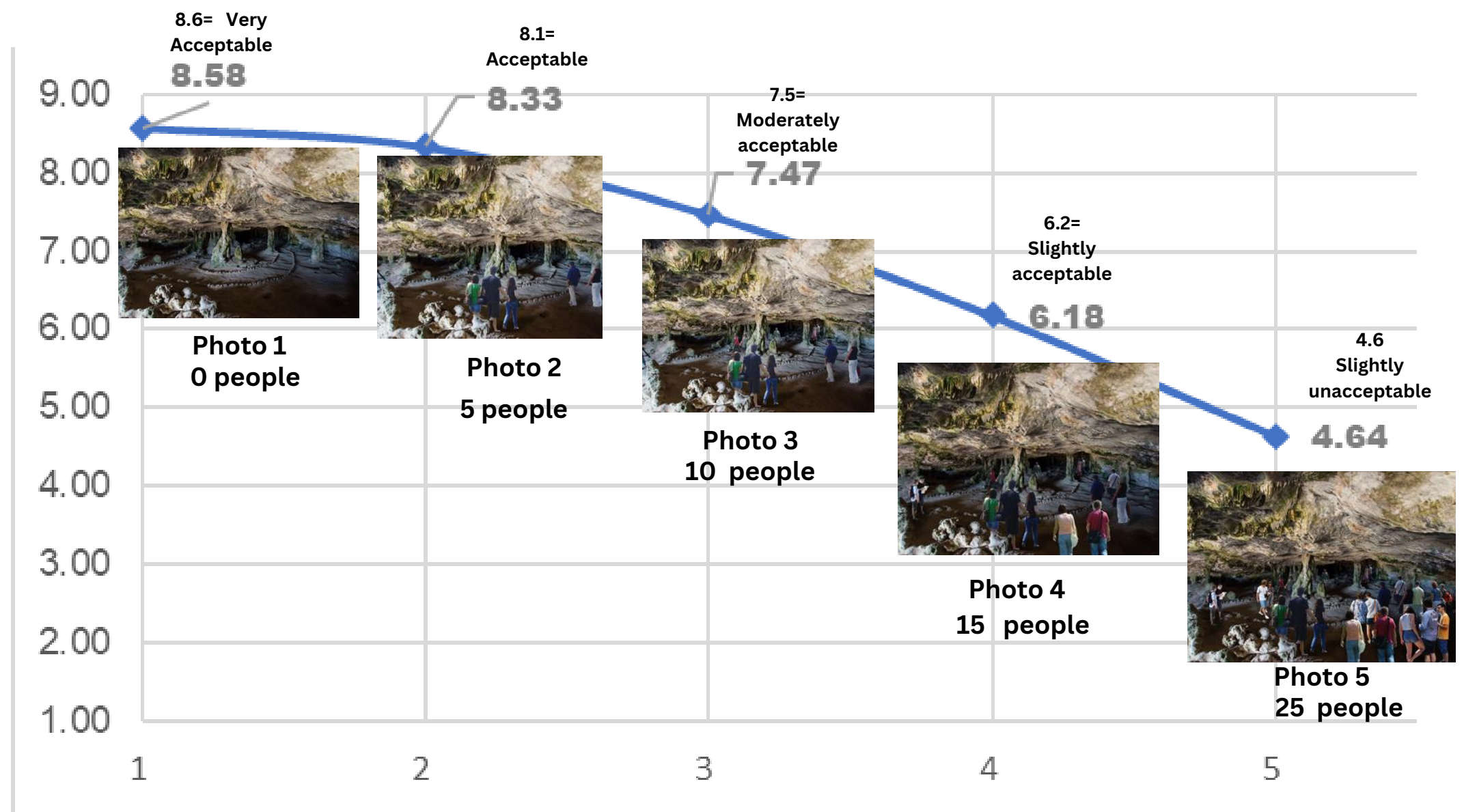


Fontein Cave  
N= 45

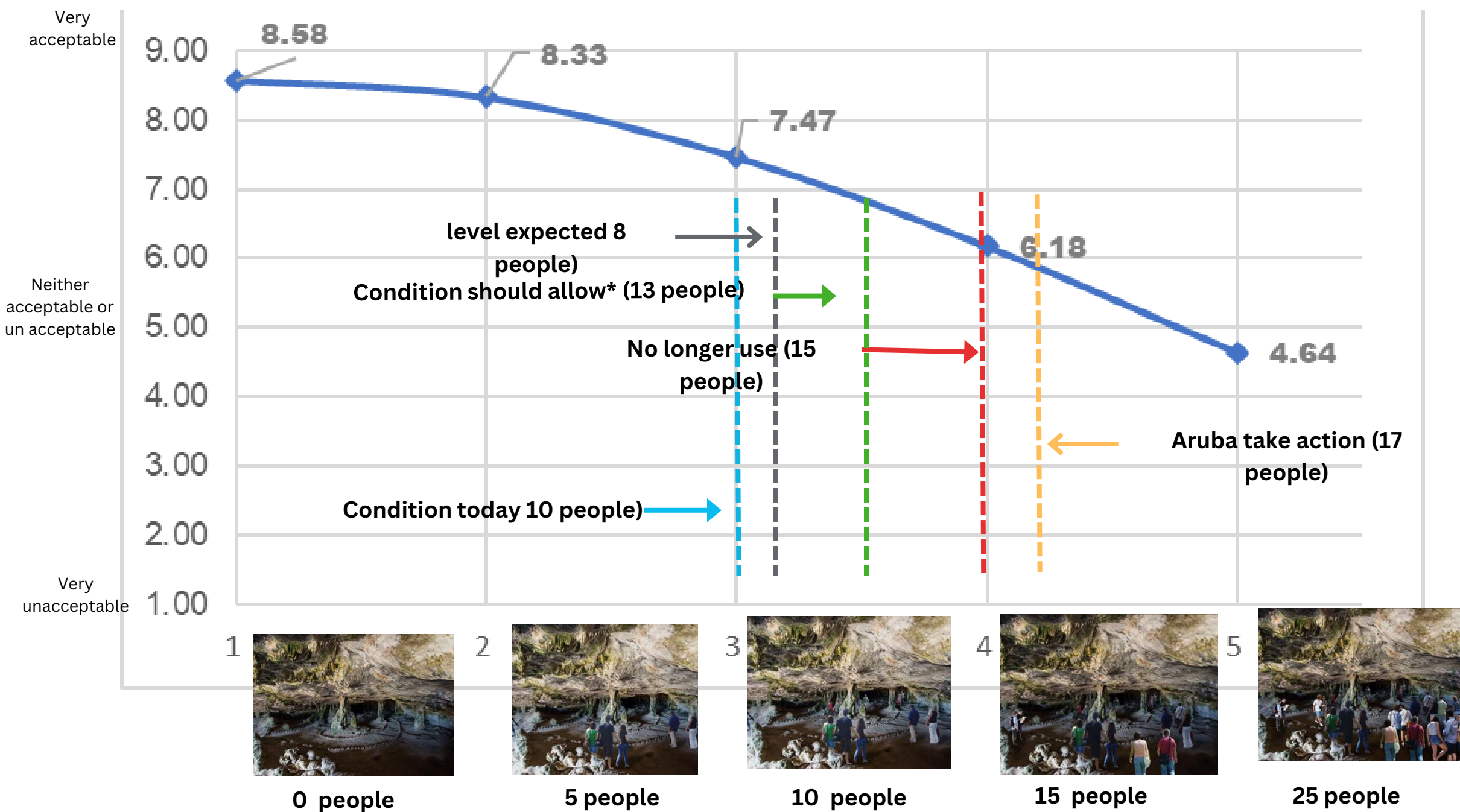


# FORTEIN CAVE

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# FONTEIN CAVE



The average Mean of condition experienced = 10 people is more than the mean of condition expected 8 people

Tipping point: 8- 17 people\*

- 16% believe none of the conditions are so unacceptable that require action
- 33% believe none of conditions are so unacceptable that they would no longer come
- 35% believe none of the conditions are so unacceptable or that visitors should be limited

# FONTEIN CAVE

PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.6=**  
**Moderately Crowded**

ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:

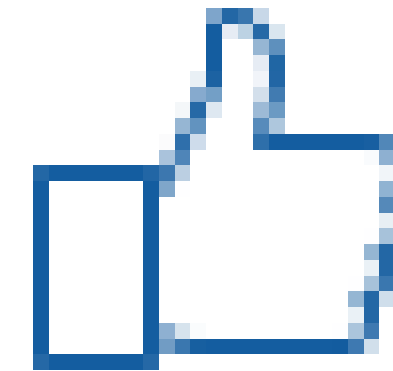


**9%**  
**Less than \$5**

**9%**  
**\$36-\$50**

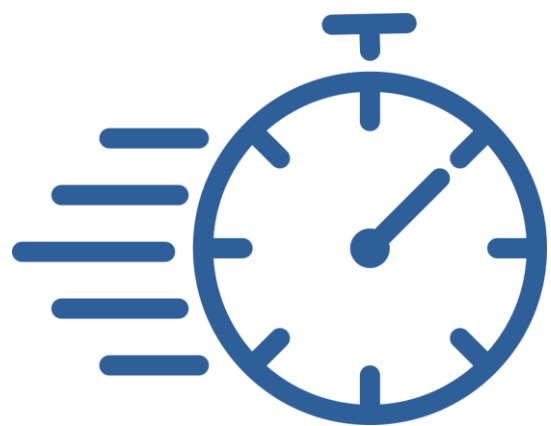
**\*71% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.9/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**67%**  
**Less than 10 minutes**

PLEASE SHARE WITH US ON WHICH COMPONENT:



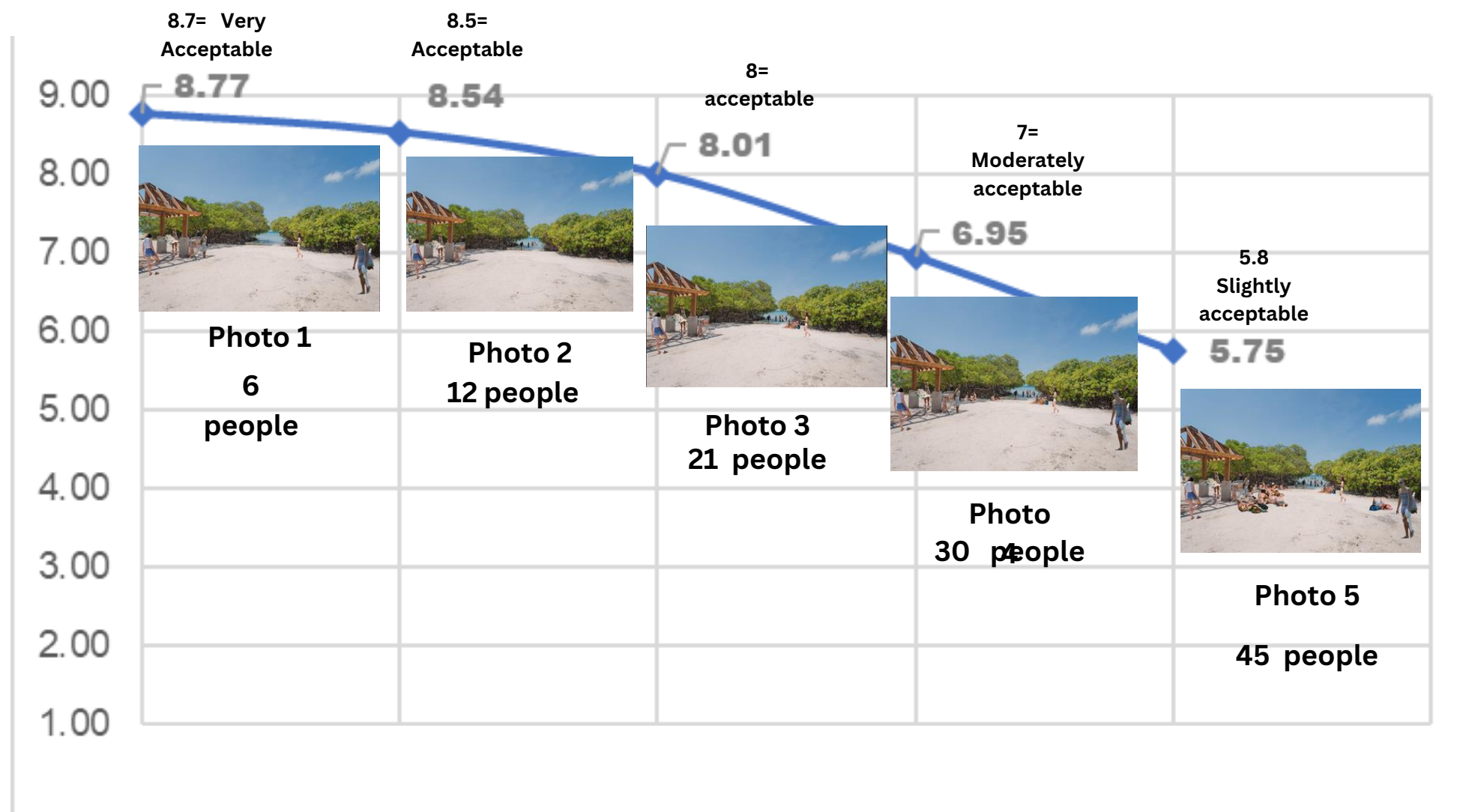
**11%**  
**On Site activities**



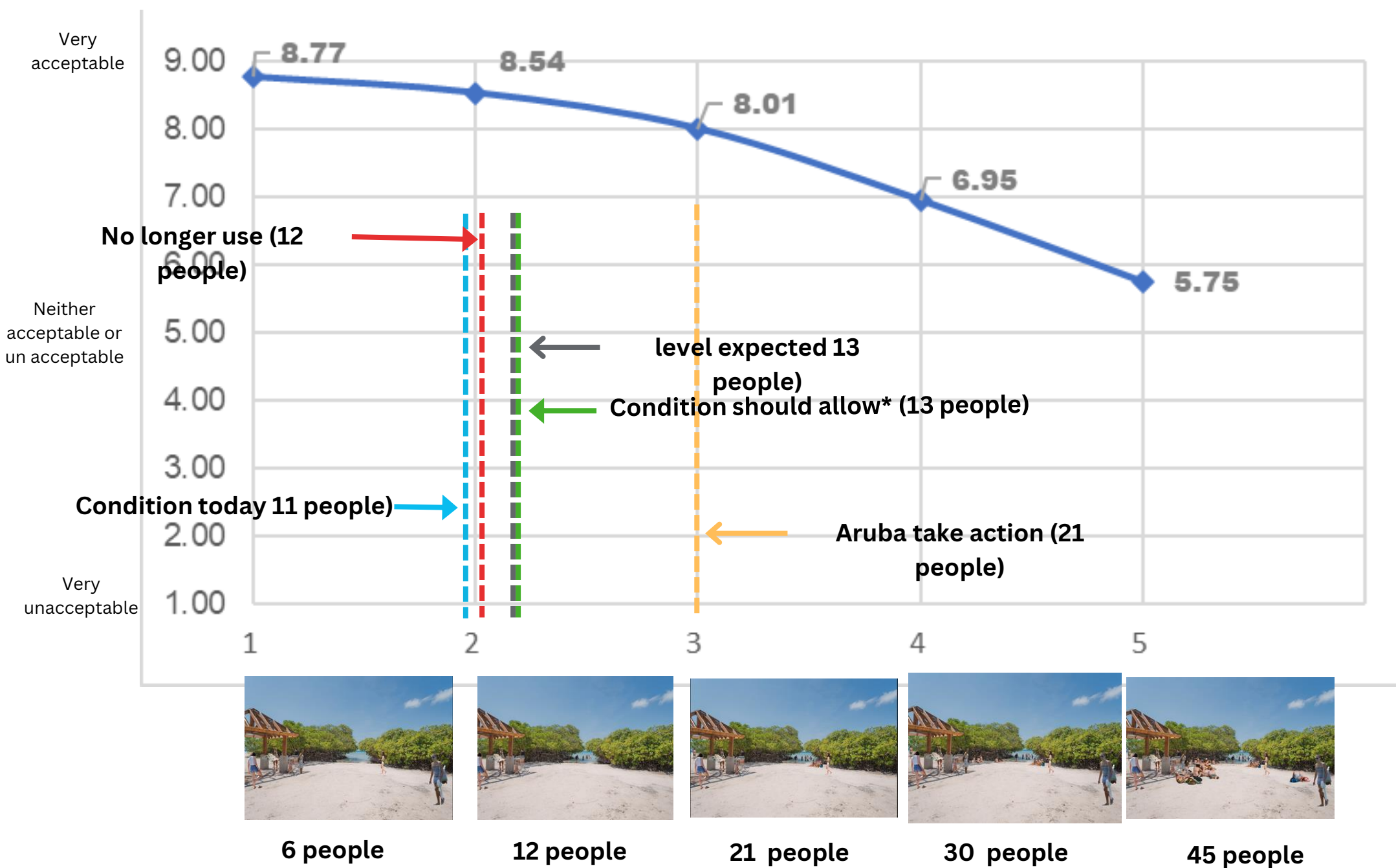
Mangel Halto  
N= 87

# MANGEL HALTO

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# MANGEL HALTO



The average Mean of condition experienced = 11 people is less than the mean of condition expected 13 people

Tipping point: 13- 21 people\*

- 41% believe none of the conditions are so unacceptable that require action
- 64% believe none of conditions are so unacceptable that they would no longer come
- 67% believe none of the conditions are so unacceptable or that visitors should be limited

# MANGEL HALTO



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**2.9=**  
**Not**  
**crowded**

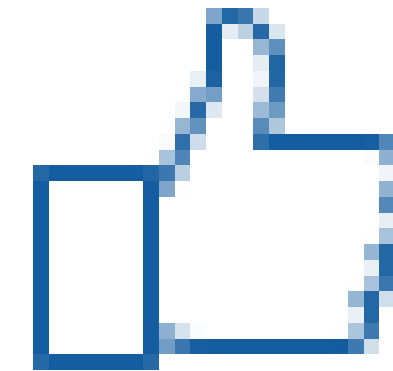
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**15%**  
**\$5-\$20**

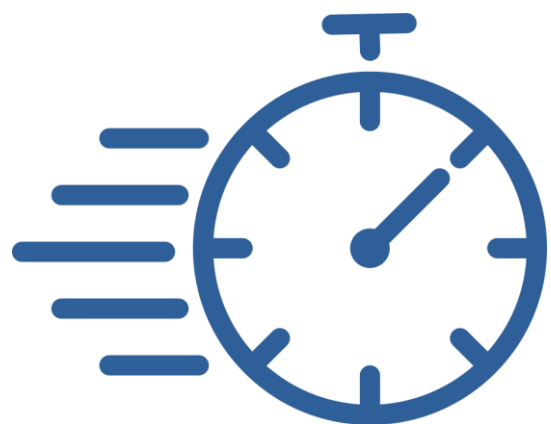
**\*69% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.4/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION

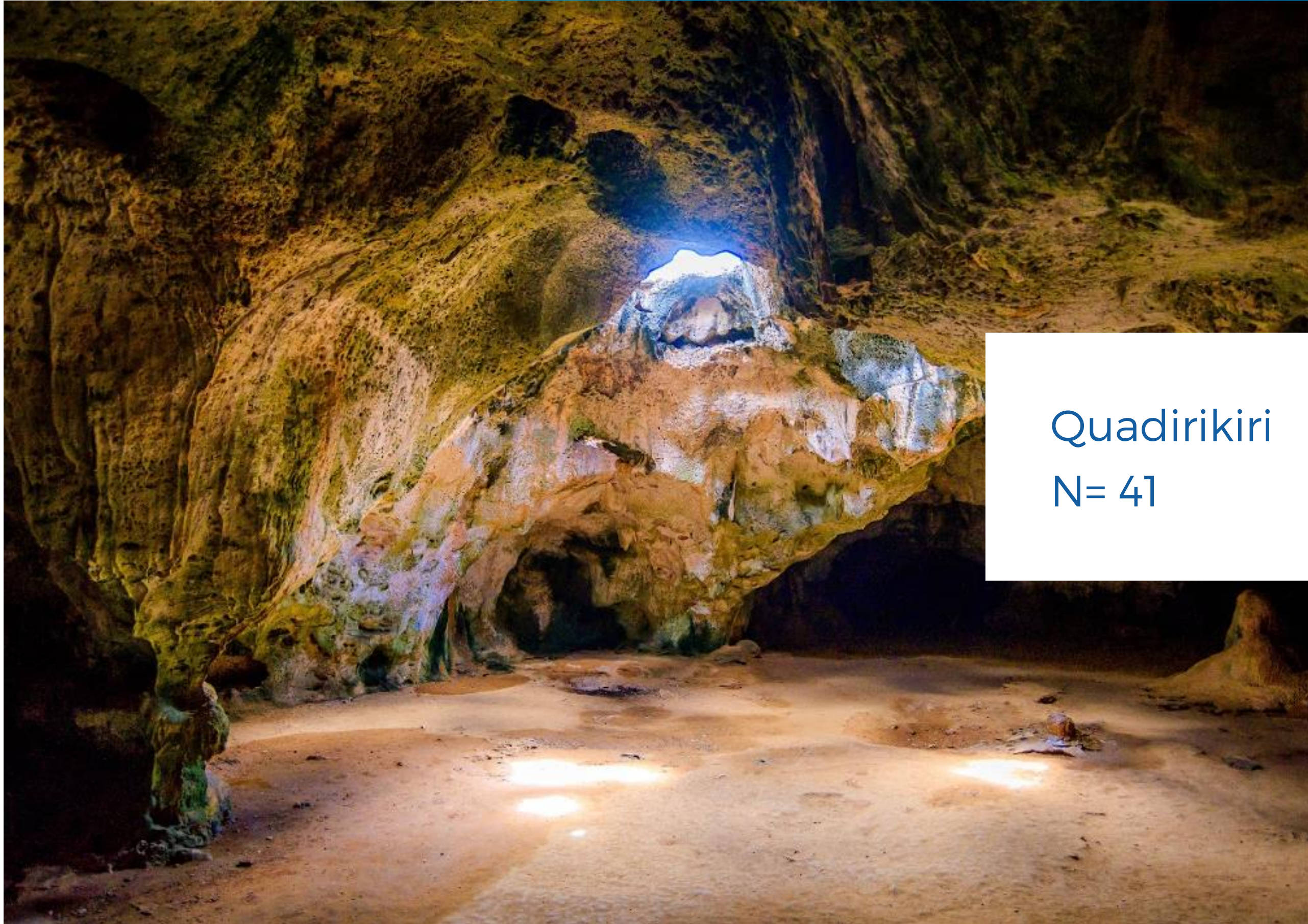


**30%**  
**More than**  
**60 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**21%**  
**Food &**  
**Beverages**

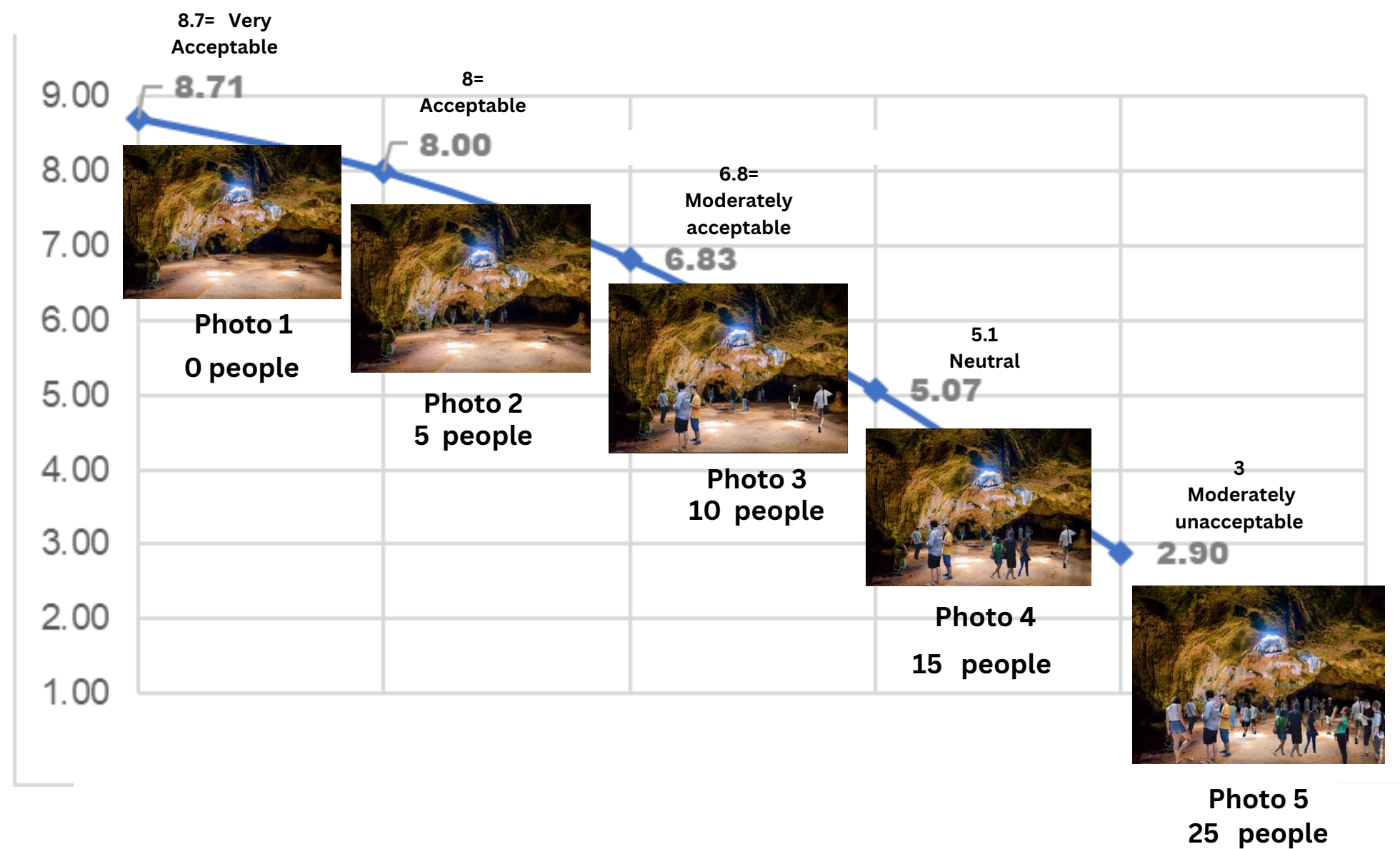


Quadirikiri  
N= 41

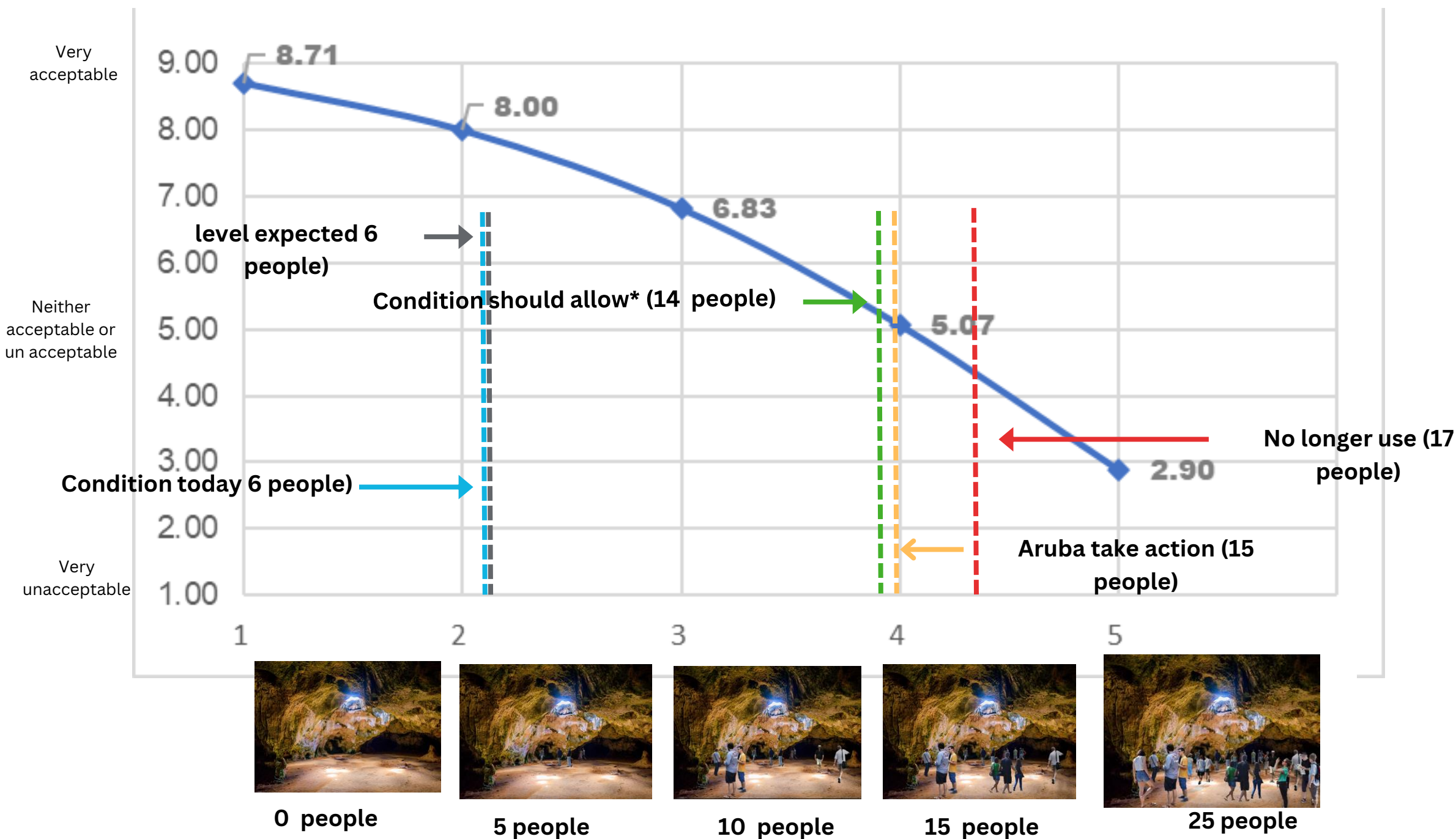


# QUADIRIKIRI

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# QUADIRIKIRI



The average Mean of condition experienced = 6 people is equal to the mean of condition expected 6 people

Tipping point: 14- 17 people\*

- 10% believe none of the conditions are so unacceptable that require action
- 20% believe none of conditions are so unacceptable that they would no longer come
- 17% believe none of the conditions are so unacceptable or that visitors should be limited

# QUADIRIKIRI



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**2.5=**  
**not**  
**crowded**

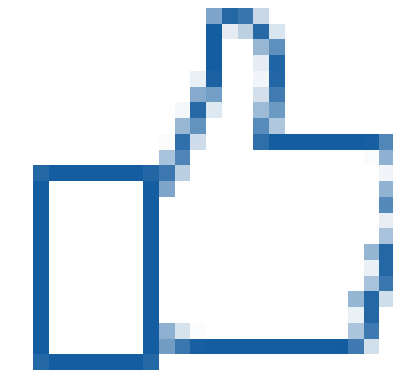
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**10%**  
**Less than**  
**\$5**

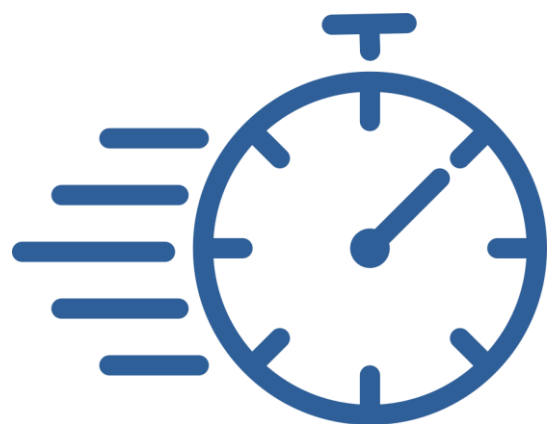
**\*76% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.5/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**56%**  
**20 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



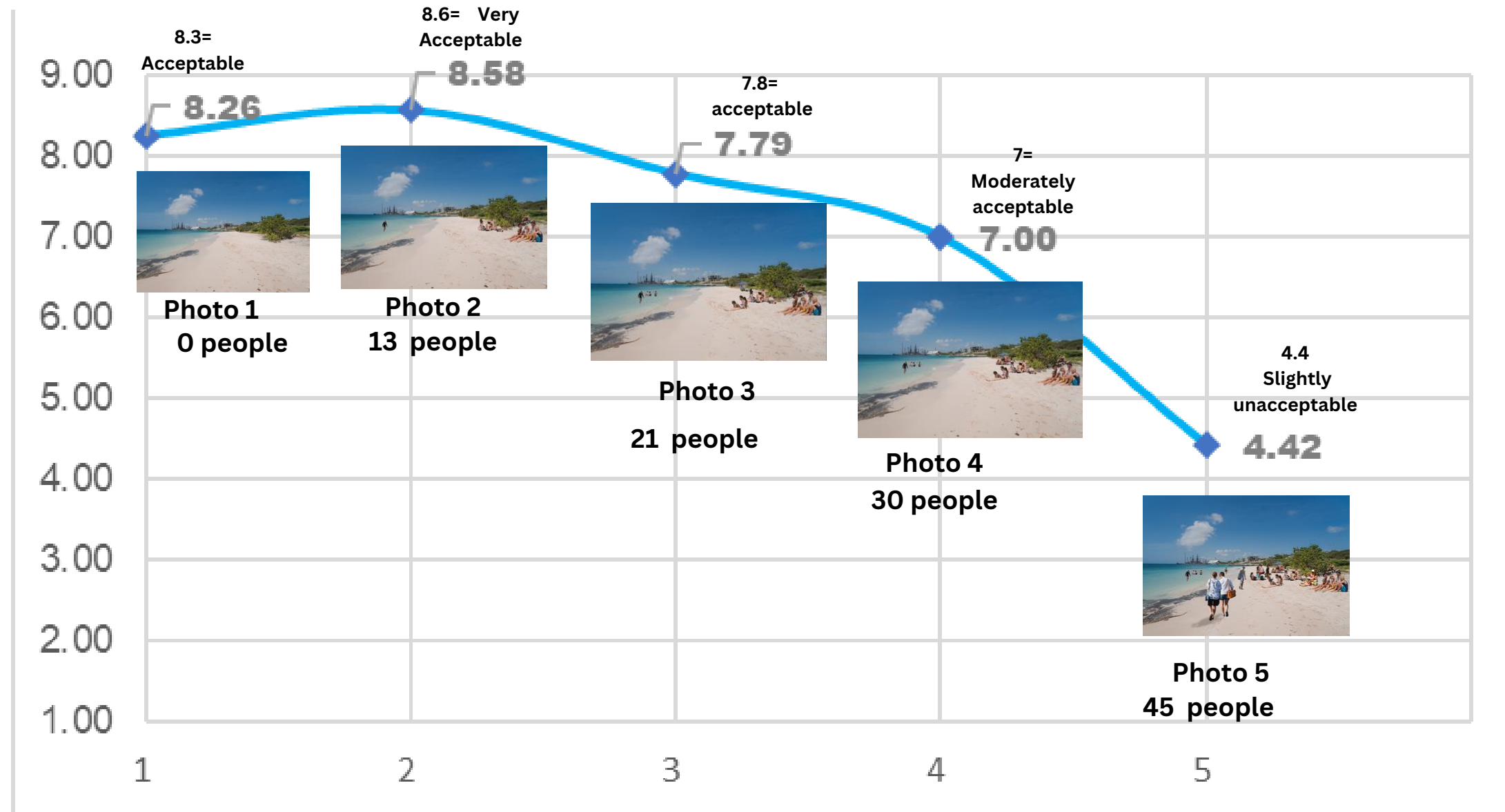
**7.3%**  
**Food &**  
**Beverages**



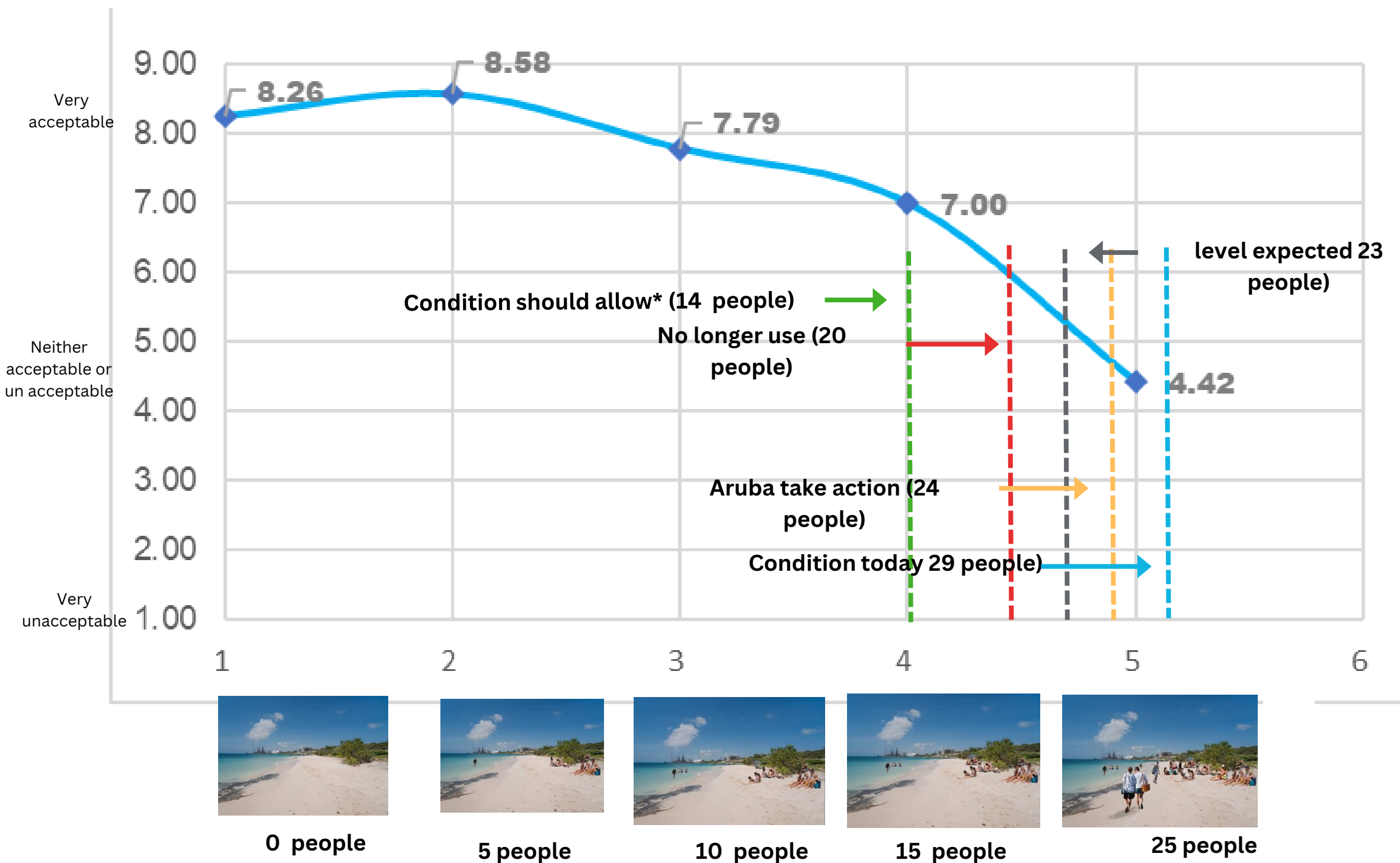
Rodgers Beach  
N= 19

# RODGER'S BEACH

Q: PLEASE RATE EACH PHOTOGRAPH BY INDICATING HOW ACCEPTABLE YOU THINK IT IS BASED ON THE NUMBER OF PEOPLE SHOWN IN THE PICTURE



# RODGER'S BEACH



The average Mean of condition experienced = 29 people is more than the mean of condition expected 23 people

Tipping point: 14- 24 people\*

- 32% believe none of the conditions are so unacceptable that require action
- 53% believe none of conditions are so unacceptable that they would no longer come
- 53% believe none of the conditions are so unacceptable or that visitors should be limited

# RODGERS BEACH



PLEASE RATE THE LEVEL OF CROWDING YOUR EXPERIENCED AT THIS LOCATION TODAY:



**3.2=**  
**not**  
**crowded**

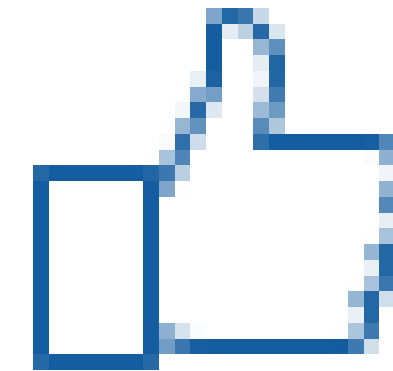
ON AVERAGE HOW MUCH MONEY DID YOU SPEND ON THE SITE:



**16%**  
**Less than**  
**\$5**

**\*84% NA**

HOW WOULD YOU RATE YOUR EXPERIENCE TODAY AT THIS SITE:



**8.2/10**

ON AVERAGE HOW MUCH TIME YOU SPENT ON LOCATION



**84%**  
**60 Min**

PLEASE SHARE WITH US ON WHICH COMPONENT:



**11%**  
**Food &**  
**Beverages**



**5.4%**  
**Beach**  
**chairs**

# KEY TAKE AWAYS

- Overall we see that study participants indicated that the sites visited are not crowded (Avg. mean of 3.3);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors are likely to return (avg. mean of 4.4);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors are likely to return if conditions are more crowded (avg. mean of 3.5);
- Study participants indicated on a scale of 1 -5 (1= highly unlikely | 5= highly likely) that visitors **might return** if conditions are more environmentally degraded and crowded (avg. mean of 3.0 = maybe);
- Out of the 14 locations - Baby beach was rated as the most crowded, followed by Ealge Beach, Palm Beach, and Arashi, while Ayo and Casibari were rated as the least crowded.



# KEY TAKE AWAYS

Location	Tipping point 2023	Tipping point 2018
California Lighthouse	24 - 29 people	25 - 31 people
Baby Beach	43 - 60 people	43 - 52 people
Alto Vista*	13 - 25 people	33 - 43 people*
Arashi Beach	81 - 117 people	33 - 37 people*
Bushiribana	12 - 21 people	21 - 30 people*
Conchi	11 - 14 people	26 - 32 people*
Eagle Beach	48 - 78 people	29 - 33 people*
Palm Beach	80 - 117 people	69 - 71 people*

\*note that the percentage of visitors who indicated that none of the conditions are unacceptable was much higher in the 2018 study than 2023 study. In 2023 the tipping point was more accurately depicted

# KEY TAKE AWAYS

Location	Tipping point 2023
Ayo	52 - 61 people
Casibari	19- 29 people
Fontein Cave	8 - 17 people
Mangel Halto	13 - 21 people
Quadirikiri	14 - 17 people
Rodger's Beach	14 - 24 people

# KEY TAKE AWAYS

- Visitor's experience - is influenced by the actual number of people (experience) rather than - the absolute number - as such we see with the pictures the tipping point is much lower than the absolute number;
- Overall the study participants indicated having a “good” overall experience at the different sites (avg score of 8 - on a scale of 1 - 10 (1- very poor | 10 = excellent));
- Overall the study participants indicated spending more time at beaches than tourist sites.

# MASHA DANKI

## Thank You

For any questions related to the report and/or additional information requests please contact  
Melanie Evans Kelly, Manager Strategy, Research, and Planning at [m.kelly@aruba.com](mailto:m.kelly@aruba.com)

