

An aerial view of the cruise ship Jewel of the Seas docked in a harbor. The ship is white with blue accents and has 'JEWEL of the SEAS' written on its side. The harbor is filled with other smaller boats, and a coastal town is visible in the background under a blue sky with scattered clouds.

# Cruise Survey Report 2023



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# Methodology

## Research Objectives:

The Cruise Report shares information about the on-island spending pattern of our cruise visitors, their on-island experience, cruise travel habits and motivations and the likelihood of returning to Aruba as stay-over visitor. In 2023

The Aruba Tourism Authority conducted monthly face-to-face surveys from April 29 – December 27, 2023, in the visitor center at the Aruba Port Authority.

The targeting audience were cruise visitors who are departing the island prior to boarding their cruise.

In total 2345 surveys were collected. These surveys were then checked for completeness and imported in our survey analyses tool- Qualtrics, where all data is stored and kept.



# Methodology

## 1. Sample Size

Sample size formula:  $n = \left( \frac{ZS}{E} \right)^2 \left[ \frac{(1.96 * 0.5)}{0.05} \right]^2 = 385$

ATA collected a total of 2345

Z= Z-score corresponding to level of confidence (in ATA's case 1,96 corresponding to 95% level of confidence). S= sample standard deviation or estimate of the population deviation: 0.5 – this is mostly used in surveys. E= acceptable magnitude of error 5%- the level of error we are willing to accept. In our case 5%.

## 2. Data Cleansing

To cleanse the spend data a new variable was created in SPSS labeled "Total Spend".

From which the Z-score was calculated :

$$Z = \frac{(X - \bar{X})}{sd},$$

Every entry smaller or greater than -3 / 3 was removed as an outlier.

## 3. Calculations

Per spending category the total average spend per party was calculated, and then weighted by share of on shore visit. For example 44% of the survey respondents reported spending an average of \$25.00 on food and beverages. Spread over the cruise parties that visited Aruba, this represented an average of \$10.99 per party (weighted). ( $\$25 \times 44\% = \$10.99$ ). The weighted sum of each 15 spending categories is the total spend per party. The total spend per party is divided by the party size, to get the average spend per person.

# Key Insights



**62%** **Duration of On-island Stay**  
of cruise visitors spent between 3 to 6 hours on the island during their visit

**47%** **Travel Party Preference**  
of cruise visitors expressed a preference for traveling with their partners.

**45%** **Motivation for Cruise Vacations**  
of the respondents indicated that their primary motivator for selecting a cruise vacation was the convenience of unpacking once and exploring multiple destinations in a single trip.

**46%** **Source of Information**  
respondents relied on recommendations from friends and family when deciding on a cruise vacation.

**56%** **Shore Excursion Booking**  
of the respondents indicate they would rather book their excursions before the trip.

**78%** **Influence of Destination on Itinerary**  
of the cruise visitors indicated that the inclusion of Aruba in the itinerary significantly influenced their decision to choose a specific cruise.

# Key Insights

## Criteria for Choosing Shore Excursions

Top 3

The top three considerations when selecting shore excursions were having fun and entertainment, creating lasting memories with travel companions, and exploring destinations safely.

## Top Excursions in Aruba

#1

The most popular excursions for a future cruise stop in Aruba were identified as beach safaris, jeep/UTV/ATV tours, and dining experiences at authentic restaurants.

## Preference for Human Interaction:

#1

Cruise visitors expressed a preference for human interaction when feeling safer and obtaining information or conducting transactions face-to-face.

## Source of Information

46%

The most highly rated experiences while in Aruba included local hospitality, beaches, and feelings of safety and security.

## Satisfaction and Likelihood to Recommend:

88%

of respondents reported satisfaction with their overall trip to Aruba, and the same percentage indicated they were likely to recommend Aruba to others.

## Likelihood of Return:

67%

While 67% of respondents expressed a likelihood of returning to Aruba by plane, a higher percentage (79%) indicated they would likely return via cruise.



## 2. Global Trends



# Global Trends

According to the State of the Cruise Industry Report by the Cruise Lines International Association, the following key findings were indicated:

1.

## New-to-Cruise

The number of new-to-cruise is increasing – 27% of cruisers over the past two years are new-to-cruise, an increase of 12% over the past year

2.

## Travel Advisors

73% of cruise travelers say that travel advisors have a meaningful influence on their decision to cruise.

3.

## Accessible Tour Excursions

Accessible tour excursions are on the rise—with 45% of cruise passengers booking an accessible tour for their most recent cruise.



# 3. Demographics



# Demographics

**CAN: 12%**

**UK: 3%**

**GER: 2%**

**NED: 1%**

**USA: 72%**

## **Top 5 States:**

Florida: 20%

New York: 7%

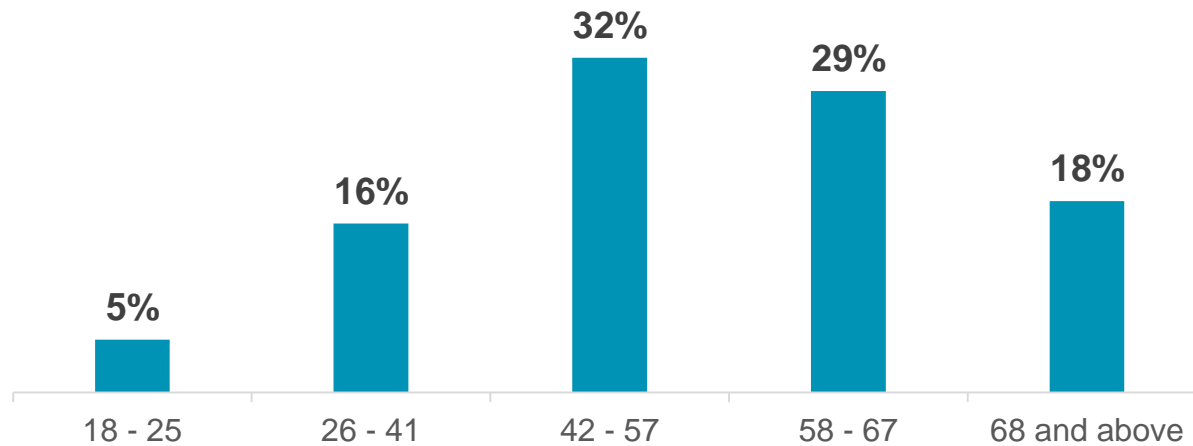
Texas: 5%

North Carolina: 5%

Georgia: 5%

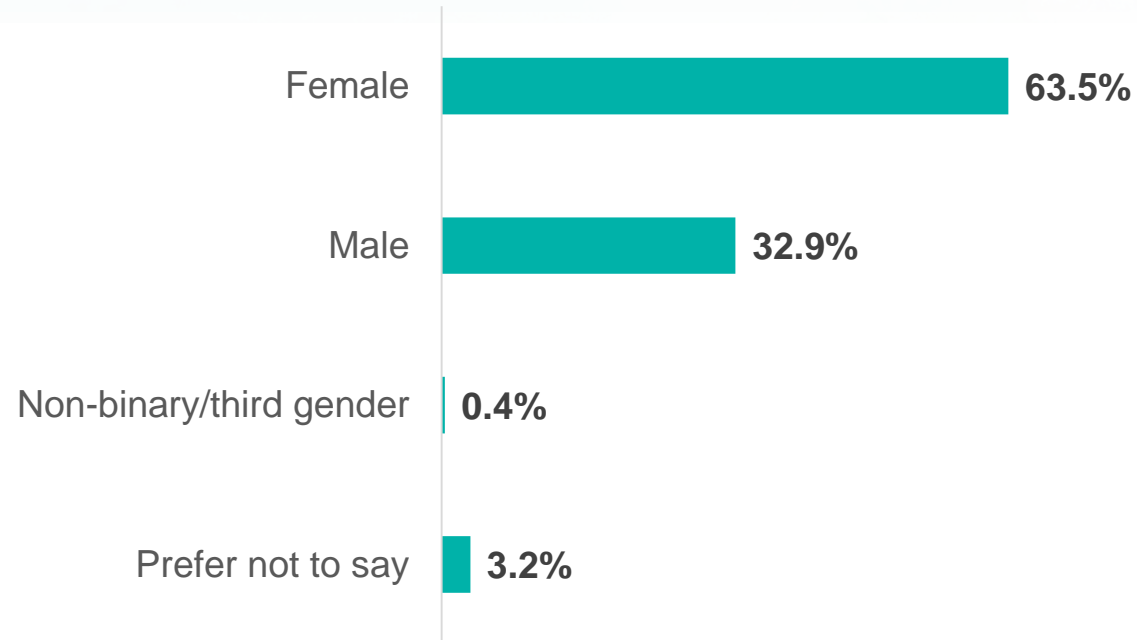
# Age Group

The largest group belongs to the Baby Boomer generation, with visitors aged 58+ (47%) of the total. Additionally, there's a significant presence of Generation X visitors aged 42 – 57 (32%), while the younger generation Gen Z (16%).



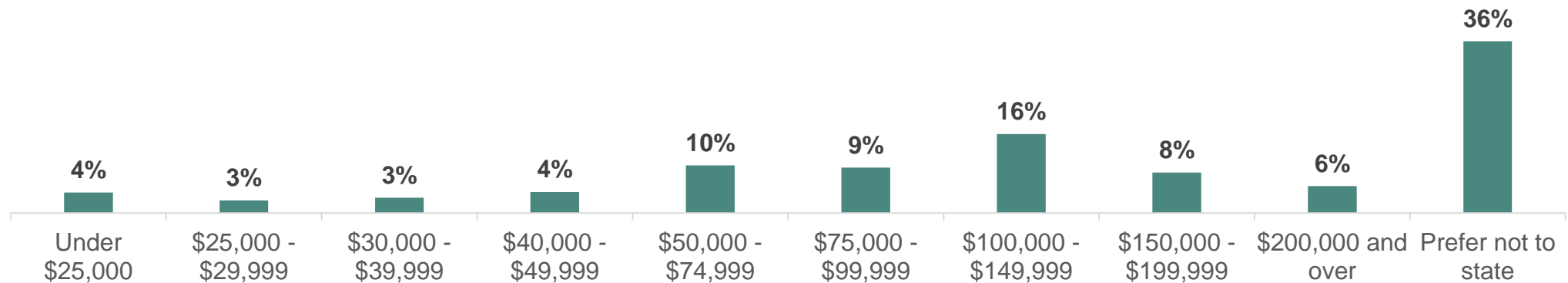
# Age Group

Female (63.5%), Male (32.9%) of the total.



# Household Income

The majority of respondents prefer not to disclose their income (36%). Among those who disclosed, the highest proportion falls within the \$100,000 to \$150,000 income bracket (16%), followed by the \$50,000 to \$74,999 bracket (10%). This suggests a concentration of respondents in the mid to upper-income brackets.



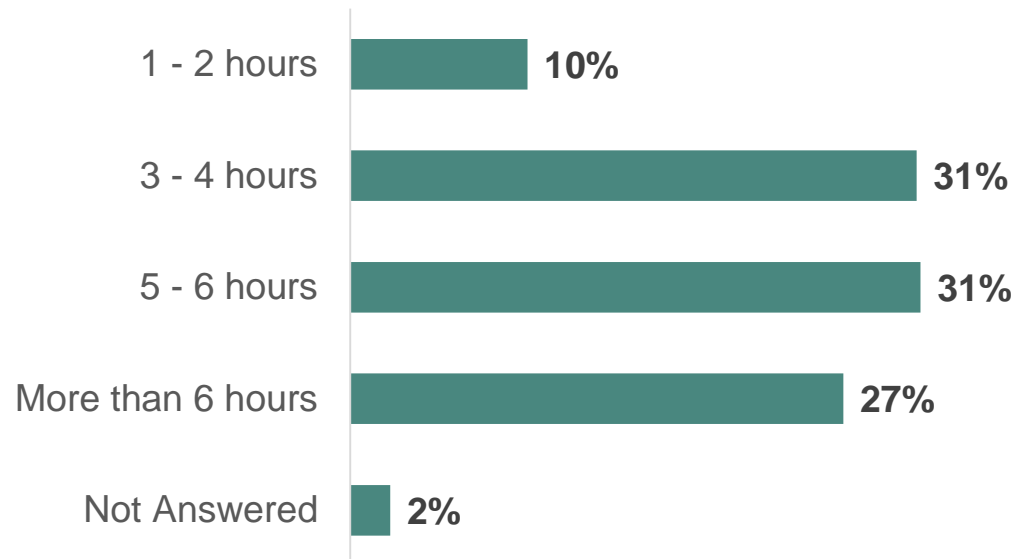
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## **Cruise Details**



# Hours on-island

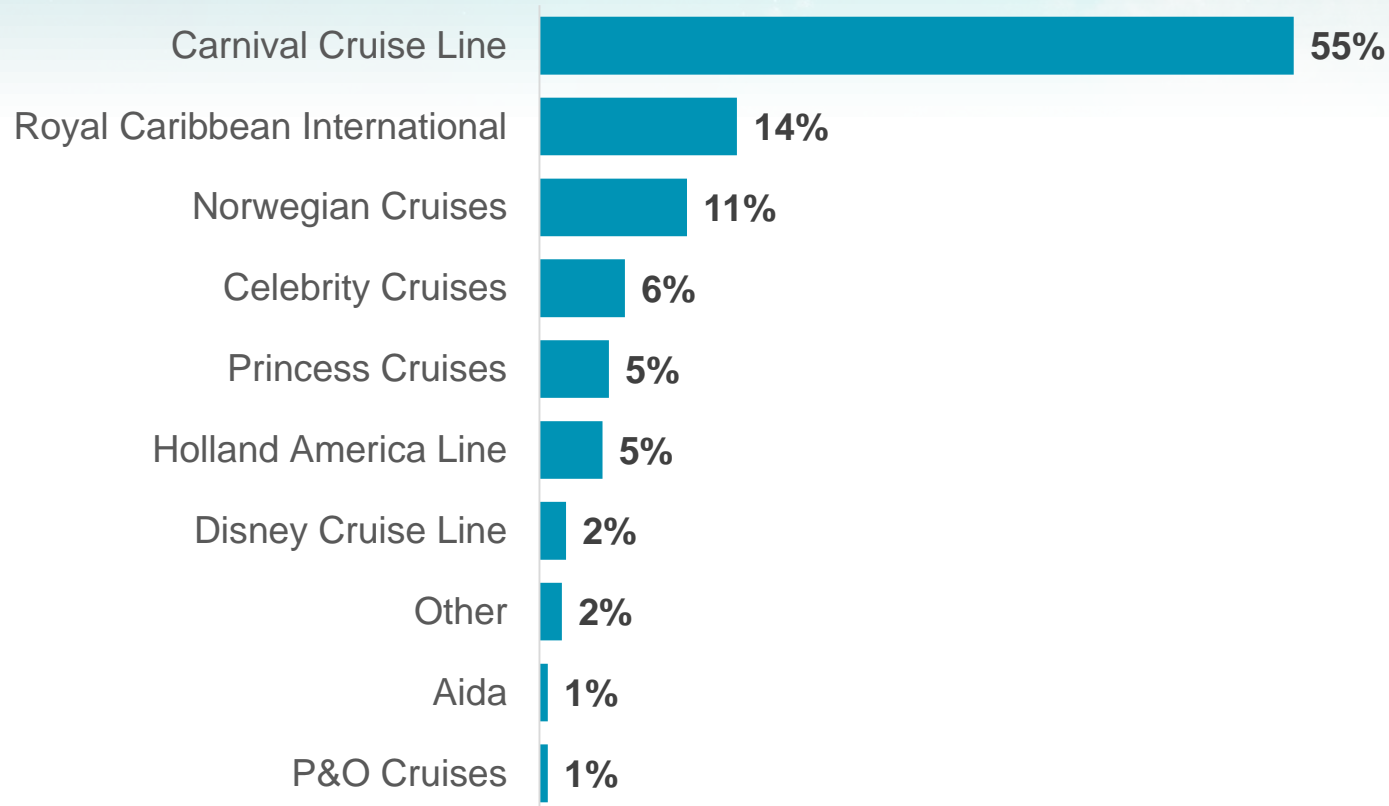
The data illustrates the distribution of cruise visitors' hours spent on the island, with the majority (31%) spending 3-4 hours and an equal percentage (31%) spending 5-6 hours. Interestingly, a significant portion (27%) spend more than 6 hours, suggesting a notable interest in prolonged exploration.



62% of passengers spent between 3-6 hours Ashore.

27% of passengers spent more than 6 hours Ashore.

# Cruise Lines



55% Carnival Cruise Line: 28% increase compared to 2018 (27%).

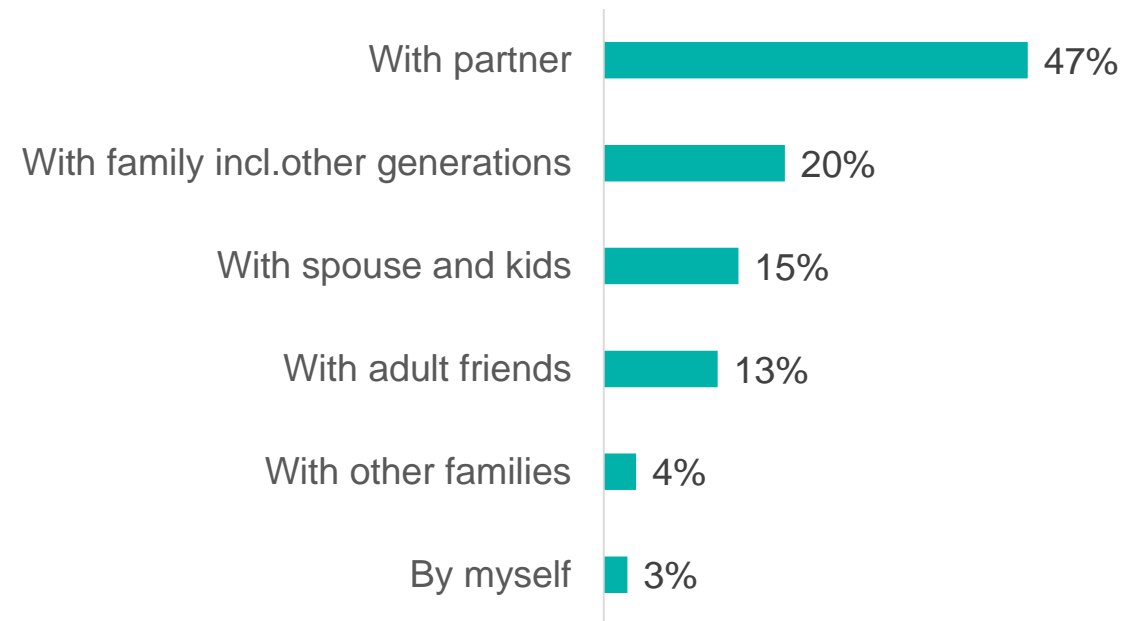
14% Royal Caribbean: 3% increase compared to 2018 (11%).

5% indicated to have visited aboard the Princess Cruise with a decline of -7% compared to 2018 (12%)



# Travel Party

almost half of respondents prefer to cruise with their partner, suggesting a preference for intimate travel experiences. Additionally, a significant portion opt for family trips, including other generations or their spouse and kids



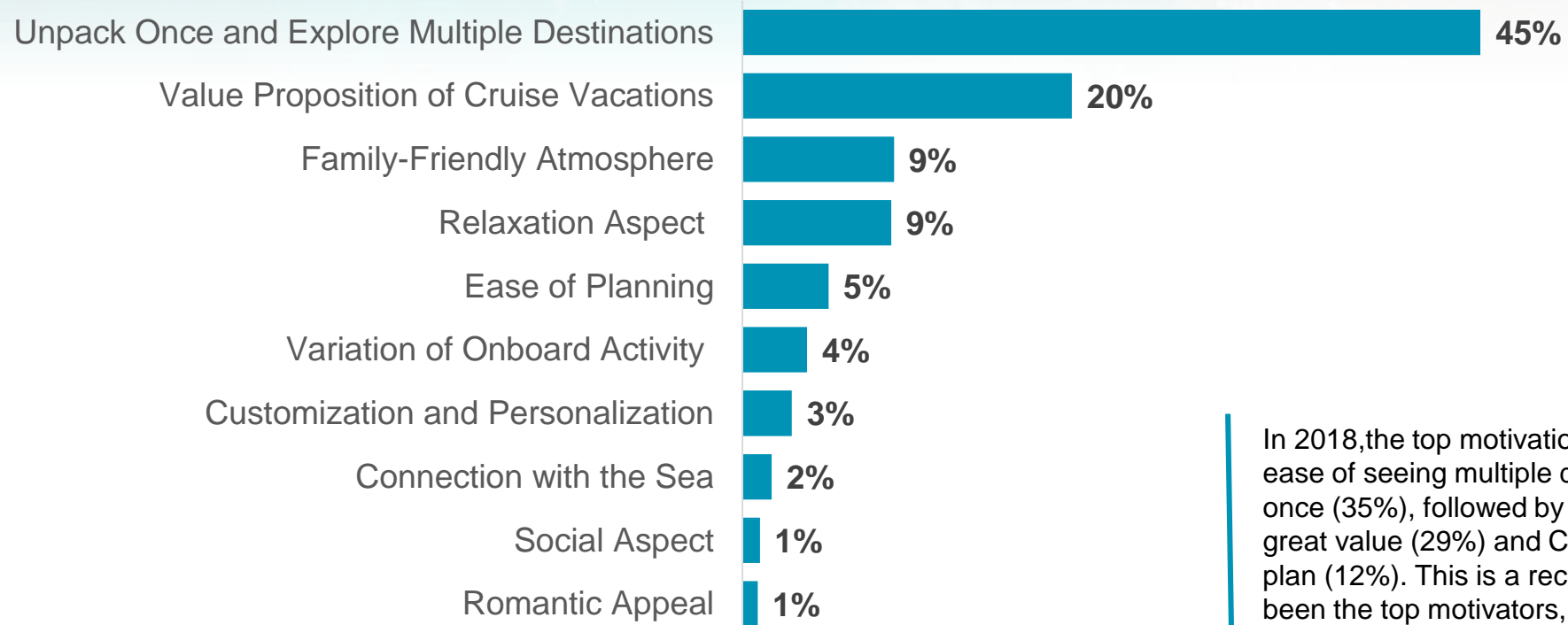
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# **Key Decision Factors**



# Top Motivations

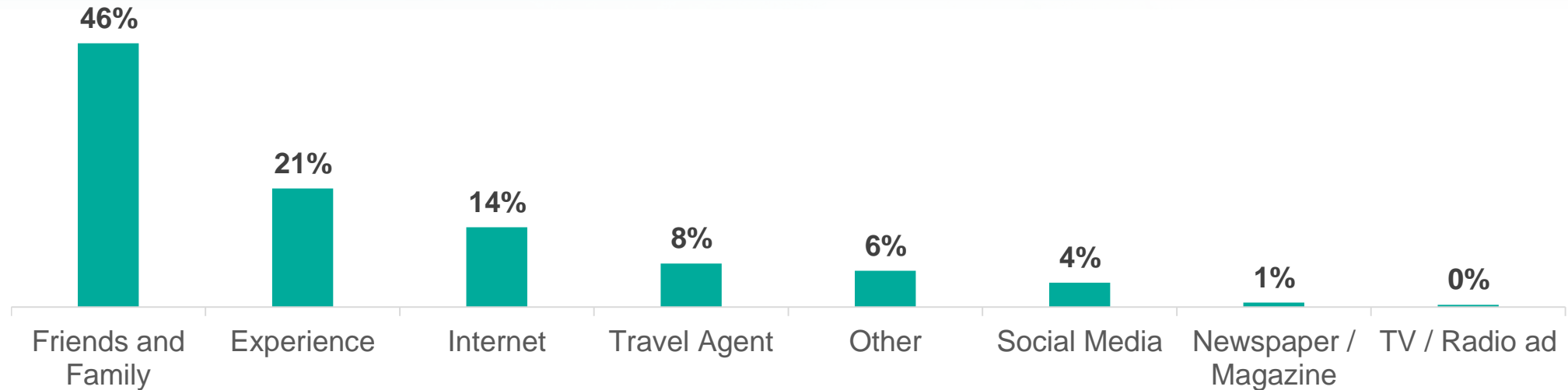
The primary motivator for choosing a cruise vacation is the convenience of unpacking once and exploring multiple destinations (45%). This, as the primary motivator, has been a recurring trend in the past years. As the second top motivator the value proposition of cruise vacations at 20%.



In 2018, the top motivation to take a cruise are the ease of seeing multiple destinations unpacking once (35%), followed by Cruise vacation offers great value (29%) and Cruise vacations are easy to plan (12%). This is a recurring trend which has been the top motivators, in the past three years. In 2017, the percentage “See Multiple Destinations, unpack Only Once” motivator was 41% and “Cruise Vacation Offers Great Value” was 22%.

# Source of Information

Friends and family play a significant role (46%) in influencing decisions regarding cruises and personal experience (21%), which indicates a reliance on personal recommendations (word-of-mouth). Meanwhile, online resources, such as the internet and social media (18%), reflect the growing influence of digital platforms in travel decision-making. Traditional sources like travel agents, newspapers, and TV/radio ads have a comparatively lesser impact, with only 9% collectively.

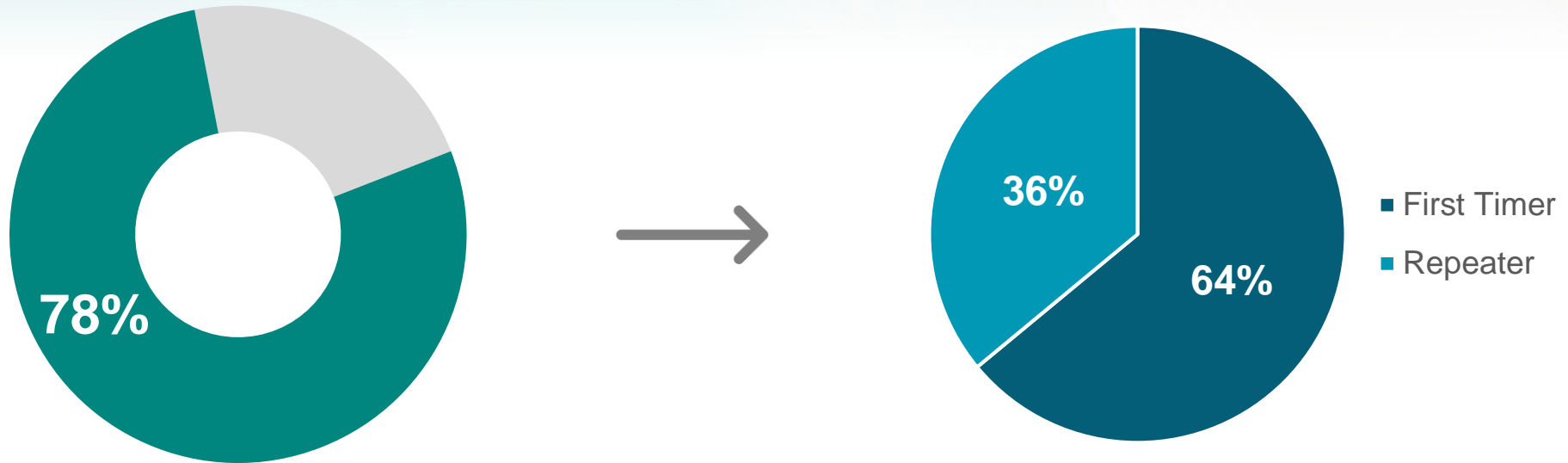


In 2018 the main source of information are friends and relatives (32%), followed by Travel Agents (22%) as the second top sources of information, Experience (22%) and Internet (15%).

# Influence of Aruba on Cruise Itinerary

78% of the respondents indicated that having Aruba on the itinerary influenced their decision to take that specific Cruise.

\*Further examination through a cross-tab analysis unveiled that among those influenced, 64% were first-timers, while 36% were repeat visitors to Aruba.



In 2018, 88% of the sample indicated that having Aruba on the itinerary influenced their decision to take the cruise trip. A cross-tab analysis was conducted, and the results showed that out of those who indicated that the destination Aruba influenced their decision to take the cruise, 79% were first-time (cruise) visitors, and 21% were repeat (cruise) visitors.

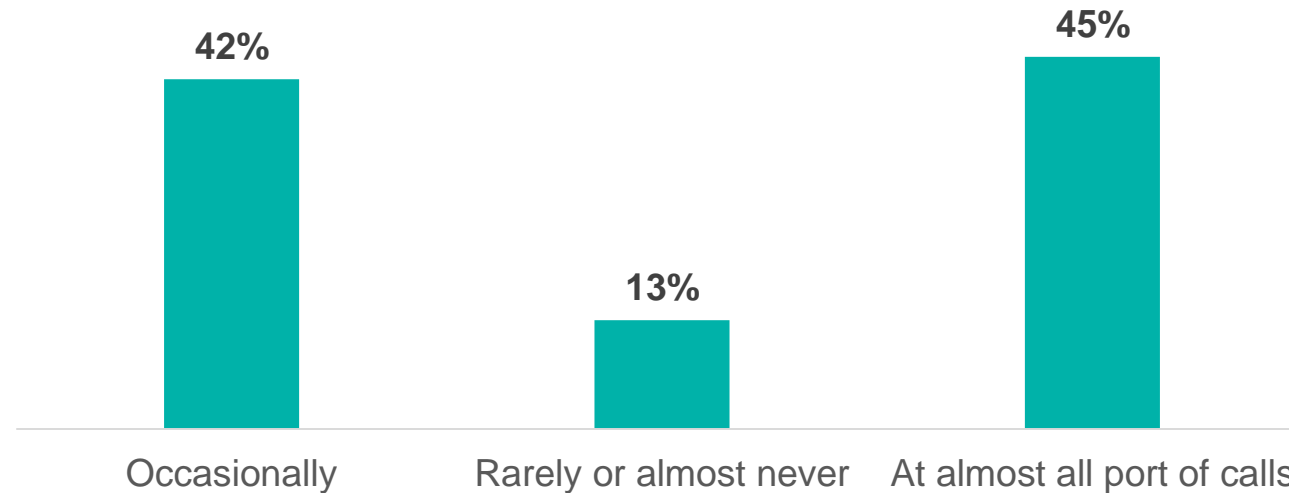
Q: Did the presence of Aruba on the itinerary influence you to take the cruise?

\*Cross tab between repeat visitor and Aruba on the itinerary

N: 2345

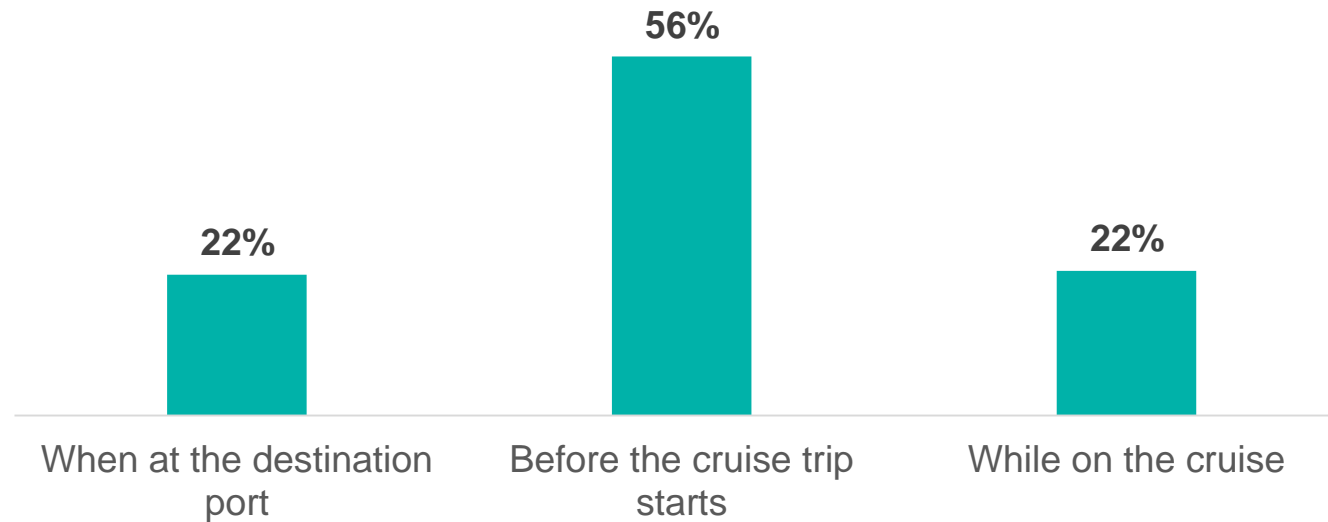
# Shore Excursion Frequency Preferences

A significant portion of respondents (45%) opt to take shore excursions at almost all ports of call during a cruise, indicating a strong preference for exploring destinations beyond the ship.



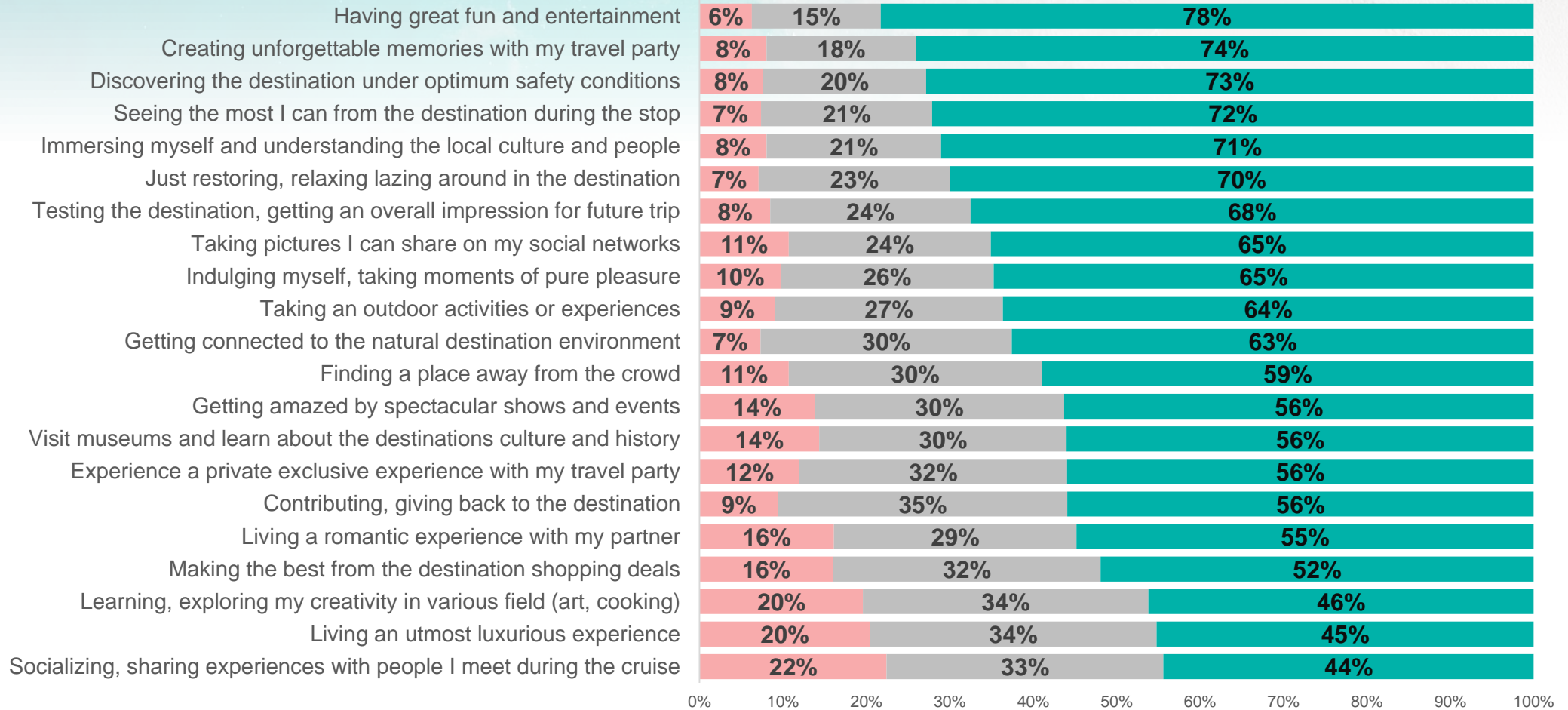
# Shore Excursion Booking Preferences

The majority (56%) prefer to book their excursions before the cruise trip starts, indicating a preference for pre-planned activities.



# Shore Excursion Activity Preferences

■ Unimportant ■ Neutral ■ Important



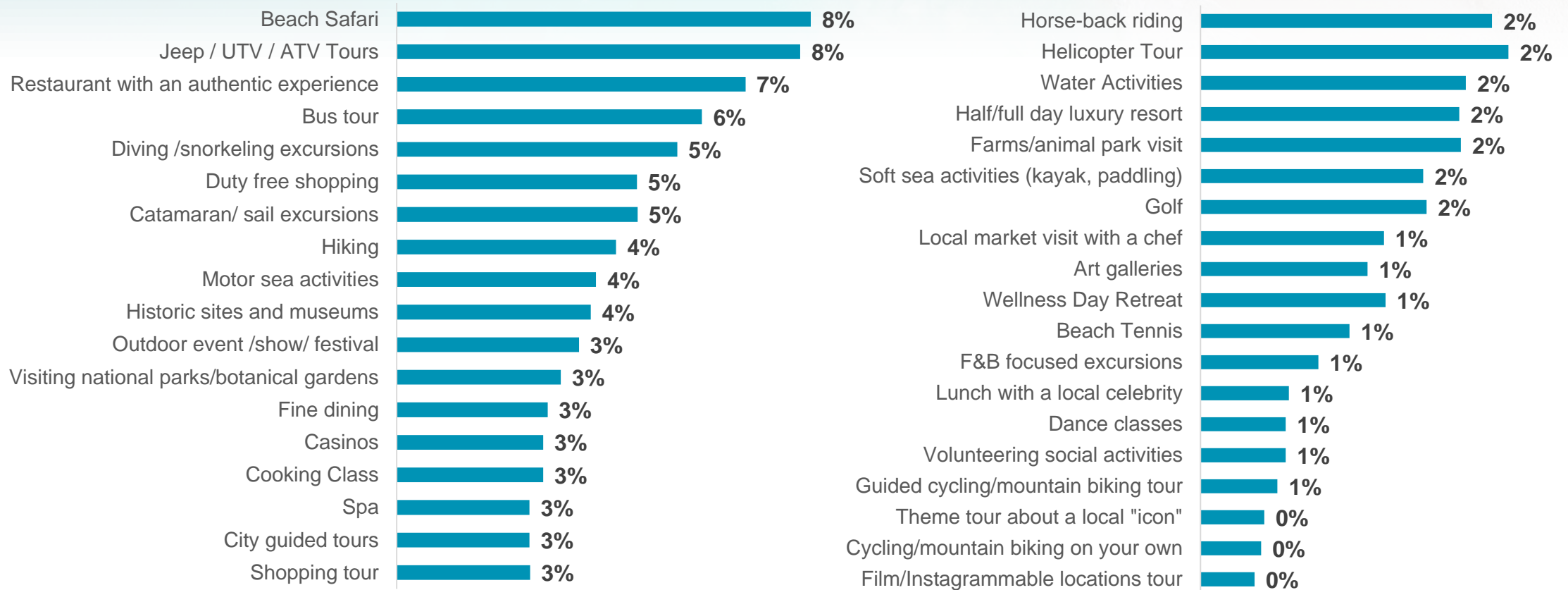
Q: How important are the following aspects when choosing a shore excursion?

N: 2345



# Future Shore Excursion Preferences

Data shows that beach safaris and jeep/UTC/ATV tours are the most popular choices, indicating a preference for adventurous outdoor experiences. Additionally, dining experiences, both in authentic restaurants and through cooking classes, are highly sought after, suggesting a desire for cultural immersion and gastronomic exploration during cruise stops. Diving/snorkeling excursions also rank high, emphasizing the allure of underwater exploration for cruise travelers



# 6. On-island Spend



# Cruise Spend 2023

Spending 2023	Average spend per party in \$	% On Island Spend (weighted)	Average spend per party in USD (weighted)
Souvenirs/Local arts	\$ 62.89	65%	\$ 41.11
F&B	\$ 67.92	71%	\$ 48.31
Prepaid Tours	\$ 176.61	46%	\$ 80.74
Tours	\$ 112.06	22%	\$ 24.52
Car Rental	\$ 105.25	4%	\$ 4.31
Taxi	\$ 48.39	20%	\$ 9.64
Public Transport	\$ 32.24	9%	\$ 2.83
Entertainment	\$ 199.89	8%	\$ 15.85
Telephone/Internet	\$ 72.41	8%	\$ 5.53
Retail	\$ 81.73	12%	\$ 10.21
Apparel	\$ 91.65	28%	\$ 25.95
Jewelry	\$ 610.92	14%	\$ 85.97
Watches/Electronics	\$ 646.58	5%	\$ 31.71
Perfume	\$ 73.66	7%	\$ 4.96
Others	\$ 112.00	12%	\$ 12.94
<b>Total Avg. Spend per Party</b>			<b>\$ 403.63</b>
Party size			2.3
<b>Avg. Spend per Person</b>			<b>\$ 172.50</b>

Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories?

N: 2345

# Cruise Spend

2018

Spending 2018	Average spend per party in \$	% On Island Spend (weighted)	Average spend per party in USD (weighted)
Local arts & crafts	\$ 56.53	47%	\$ 26.36
F&B	\$ 55.45	35%	\$ 19.17
Prepaid Tours	\$ 161.20	26%	\$ 42.00
Tours	\$ 100.28	31%	\$ 31.07
Car Rental	\$ 117.59	6%	\$ 6.81
Taxi	\$ 36.30	23%	\$ 8.22
Public Transport	\$ 12.69	7%	\$ 0.88
Entertainment	\$ 93.68	4%	\$ 4.09
Telephone	\$ 29.86	1%	\$ 0.32
Retail	\$ 49.23	15%	\$ 7.60
Apparel	\$ 59.85	15%	\$ 8.97
Jewelry	\$ 303.65	6%	\$ 18.02
Watches	\$ 150.65	4%	\$ 6.12
Perfume	\$ 59.03	5%	\$ 3.15
Others	\$62.86	9%	\$5.84
<b>Total Avg. Spend per Party</b>			<b>\$ 188.40</b>
Party size			2.3
<b>Avg. Spend per Person</b>			<b>\$ 81.70</b>

# Cruise Spend Comparison

## 2017, 2018, & 2023

Between 2017 and 2018, there was a significant decrease in both average spend per party and per person, but by 2023, there was a substantial increase, surpassing 2017 levels, suggesting a notable rebound in spending habits over time.

	2017	2018	2023
Avg. Spend per Party	\$288.73	\$188.40	\$403.63
Party Size	2.29	2.3	2.3
Avg. Spend per Person	\$129.95	\$81.70	\$172.50

**7.** **On-island Spend**  
***Deep Dive***



# Spending in Dollars

## High Season vs. Low Season

High Season vs Low Season

	Low Season Average spend per party in \$	High Season Average spend per party in \$
F&B	\$60.00	\$42.00
Prepaid Tours	\$92.72	\$75.00
Tours	\$33.13	\$20.24
Car Rental	\$7.62	\$2.66
Taxi	\$14.39	\$7.27
Public Transportation	\$4.60	\$1.95
Entertainment/Nightlife/Casino	\$22.82	\$12.40
Internet/Phone	\$8.93	\$3.48
Liquors/Cheese	\$9.91	\$10.36
Apparel	\$25.07	\$26.39
Souvenirs/Local Crafts	\$46.59	\$38.40
Jewelry	\$100.29	\$78.90
Watches	\$47.68	\$23.78
Perfumes/Cosmetics	\$6.73	\$4.08
Others	\$10.24	\$14.29
<b>Total:</b>	<b>\$490.72</b>	<b>\$361.20</b>
Party size	2.56	2.51
<b>Avg. Spend per Person:</b>	<b>\$191.34</b>	<b>\$143.78</b>

Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories?

N: 2345

# Spending in Dollars

## High Season vs. Low Season

The table illustrates the percentage of arrivals and their corresponding expenditures allocated to specific categories during high and low seasons.

	Low Season	High Season	Difference in %
F&B	75%	69%	-5%
Prepaid Tours	46%	46%	-1%
Tours	27%	19%	-8%
Car Rental	7%	3%	-4%
Taxi	24%	18%	-6%
Public Transportation	10%	8%	-2%
Entertainment/Nightlife/Casino	9%	7%	-2%
Internet/Phone	10%	6%	-4%
Liquors/Cheese	13%	12%	0%
Apparel	28%	29%	1%
Souvenirs/Local Crafts	64%	66%	2%
Jewelry	18%	12%	-6%
Watches	7%	4%	-3%
Perfumes/Cosmetics	7%	6%	-1%
Others	9%	5%	-5%

Low Season: April – September

High Season: October – December

Interestingly, the data suggests that cruise passengers tend to spend less during the High Season compared to the Low Season, with an average difference of -3% points between the two seasons.

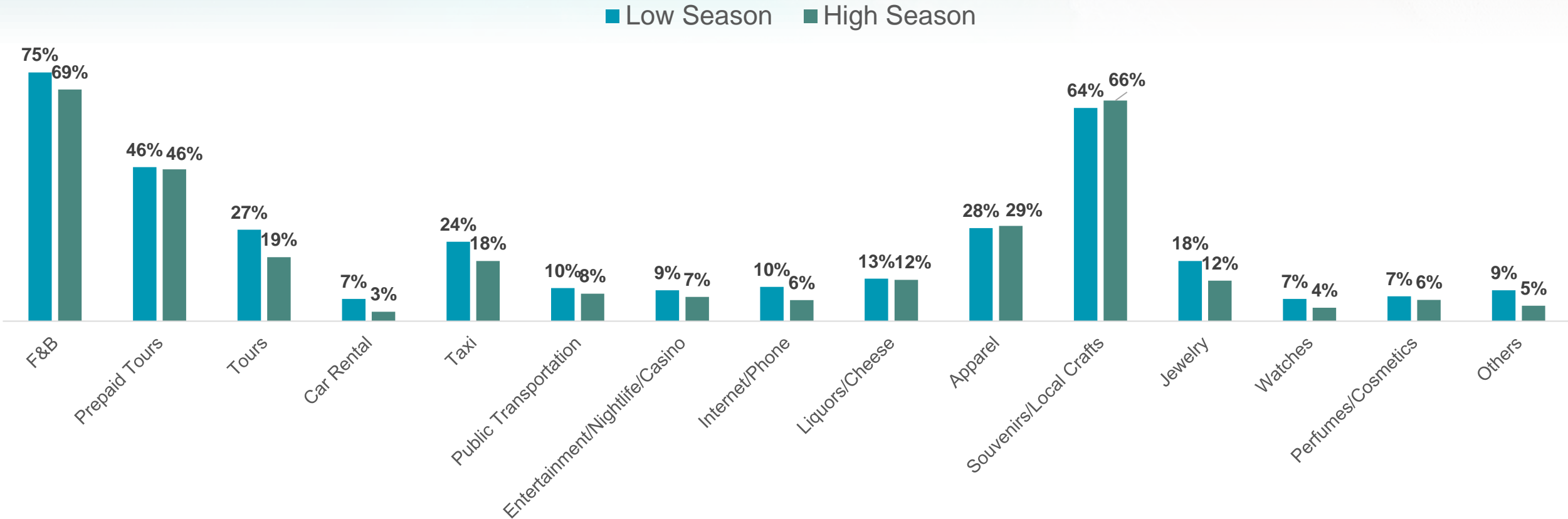
This contrasts with the findings from 2018, where the High Season showed an average increase of +2% points compared to the Low Season.



# Spending in Dollars

## High Season vs. Low Season

The top 5 spending categories: Food & Beverage, Souvenirs/Local Crafts, Prepaid Tours, Apparel, Tours  
 Data shows that Jewelry sees a significant decrease (-6%) in spending during the high season.



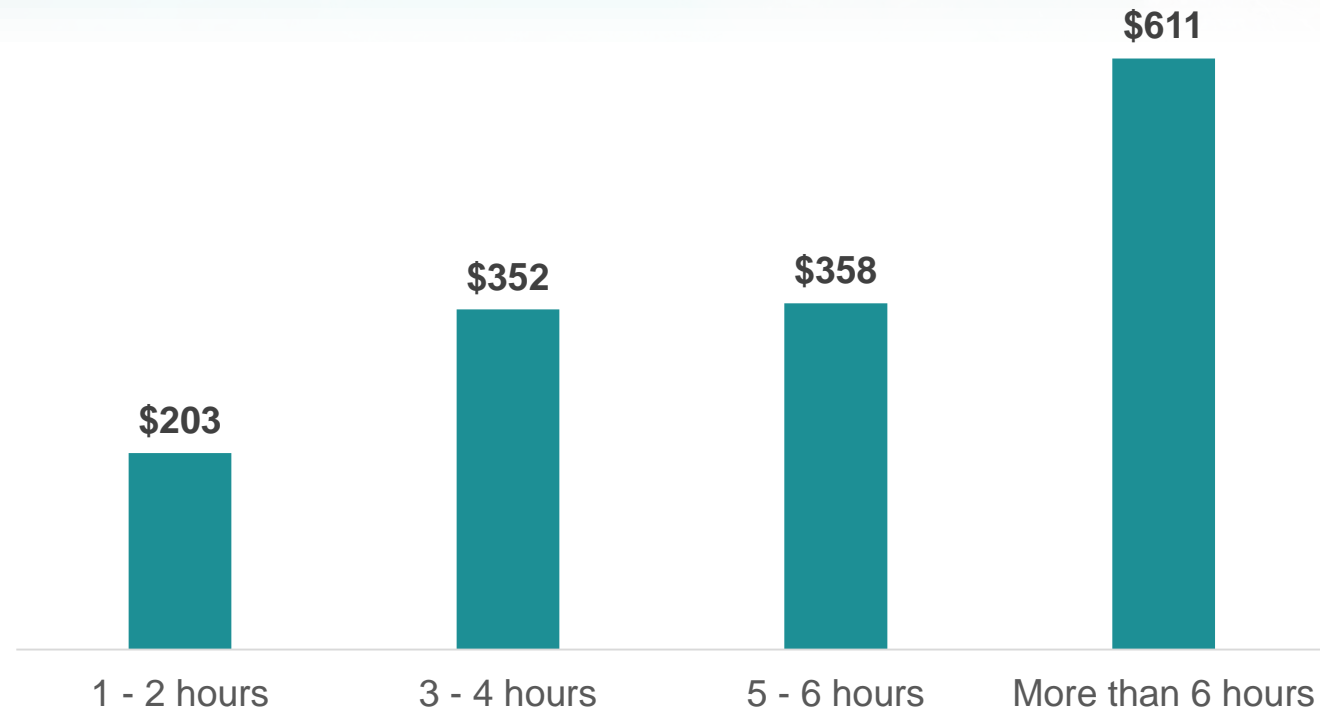
Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories?

N: 2345

# Spending

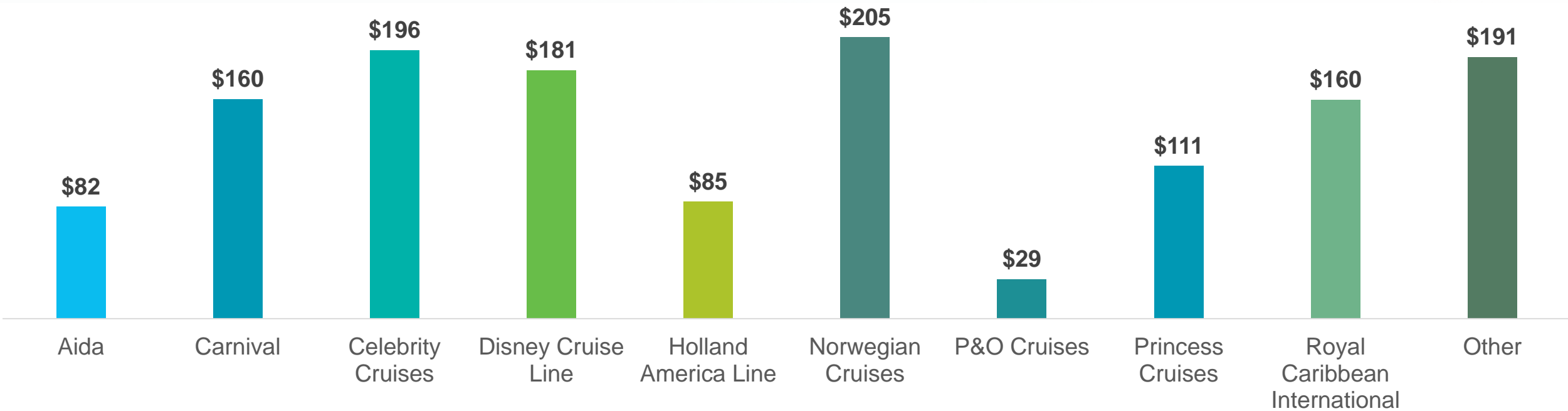
## By hours on-island

It was observed in 2023, 2018, and 2017 that the longer the cruise visitors spent on shore, the more they tended to spend. Among the respondents, 32% reported spending 5-6 hours in Aruba, while 31% spent 3-4 hours.



# Spending by Cruise Line

Norwegian Cruises spent more on average per person, followed by Celebrity Cruise, Other Cruises, and Disney Cruise Line



\*Weighted average derived using group size composition assumptions

Q: What were your traveling party's expenditures in total when in Aruba for each of the following categories? /Please select your cruise line

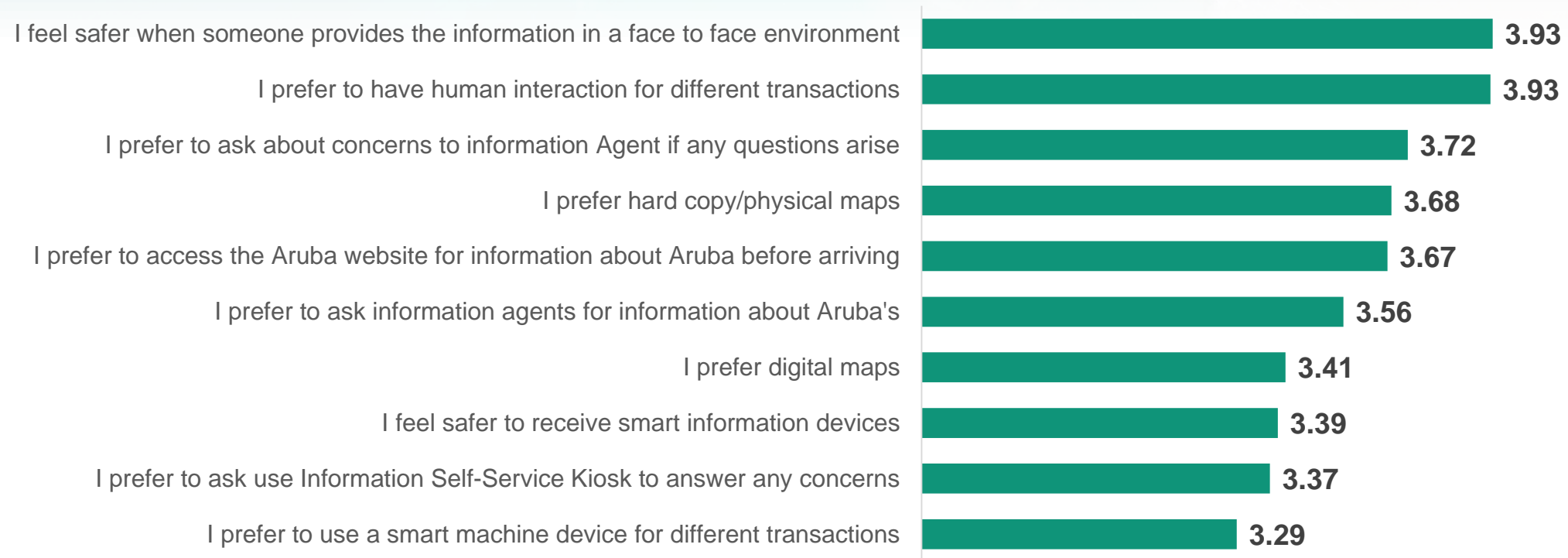
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# 8. On-island Ratings

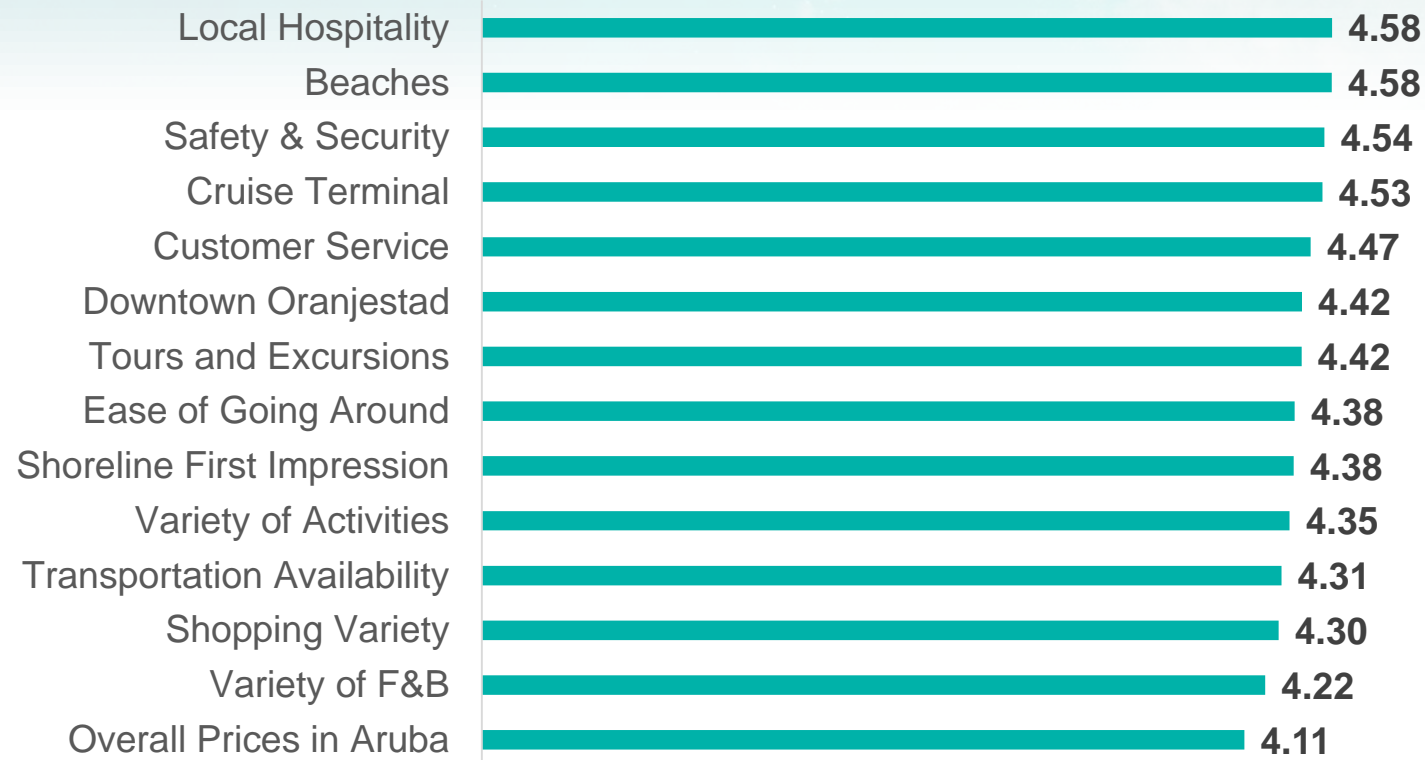


# Human Interaction vs. Automation

Data shows that respondents generally value human interaction for feeling safer and prefer face-to-face environments for obtaining information and other transactions. While there is a slight preference for hard copy maps over digital ones, the trend is towards digital resources.



# On-Island Experience Ratings

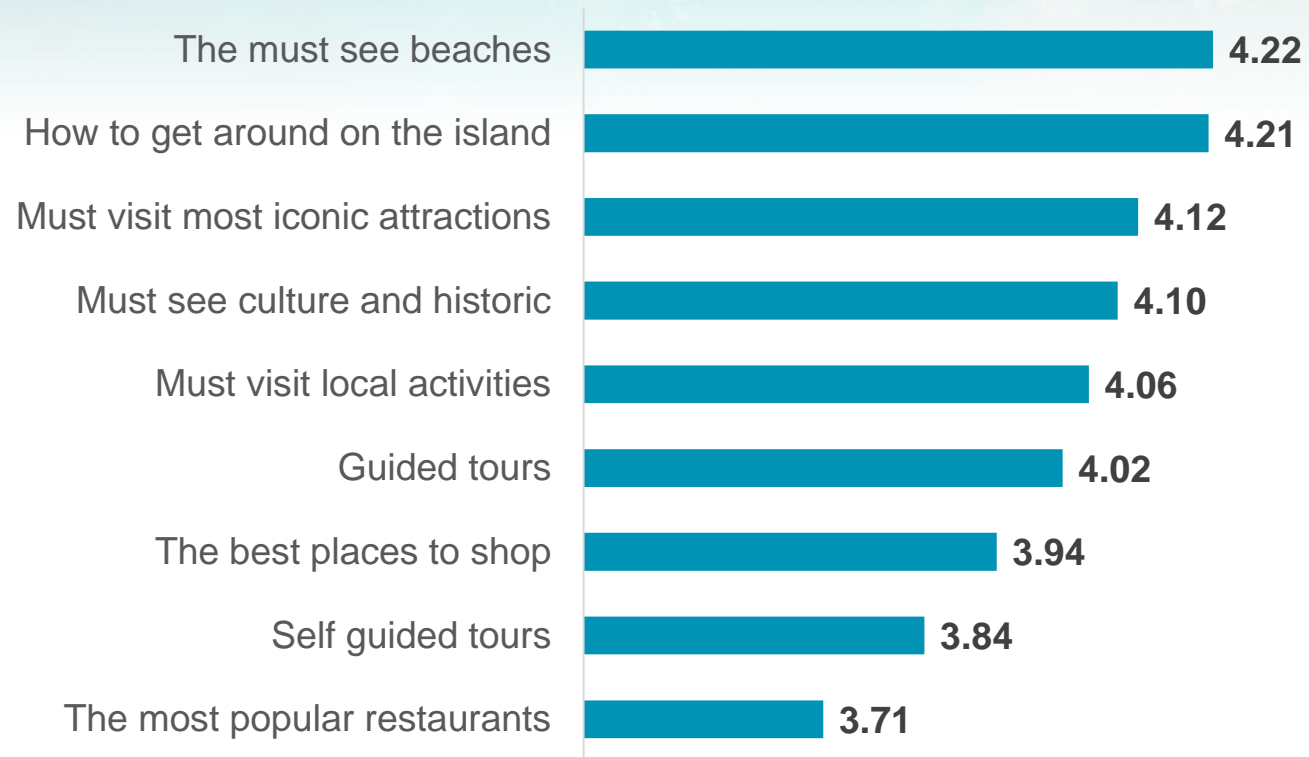


Highly rated experiences among the respondents are local hospitality, beaches, safety & security, and cruise terminal.

Overall prices in Aruba received slightly lower ratings but still maintained a positive perception overall.

In 2018, the feeling of safety & security was rated the highest, while prices in Aruba were rated the lowest.

# Information Preference

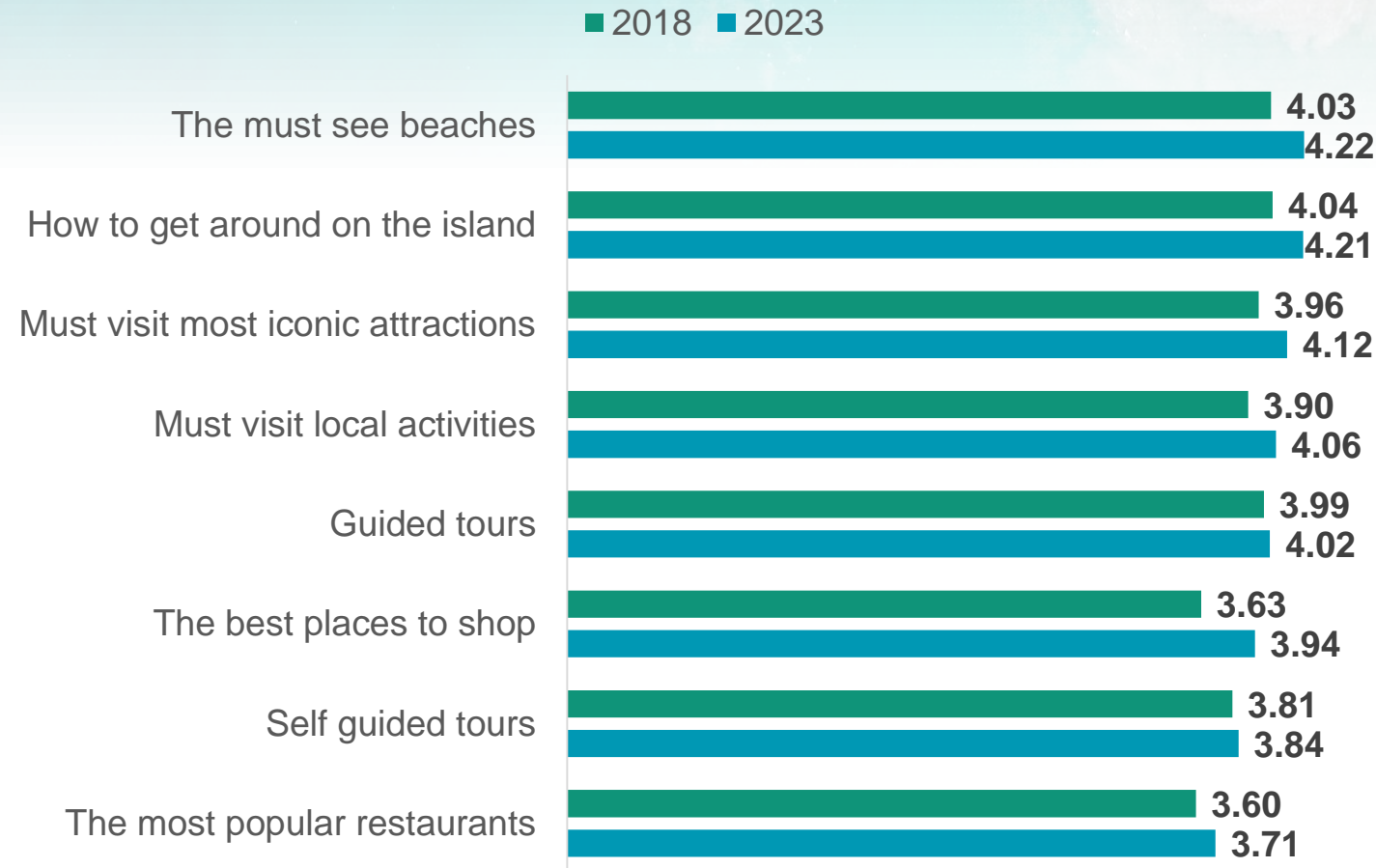


Respondents indicate that they are primarily interested in information about the must-see beaches and how to get around the island.

They are less interested in self-guided tours and popular restaurants.

# Information Preference

Comparison of 2018 vs. 2023



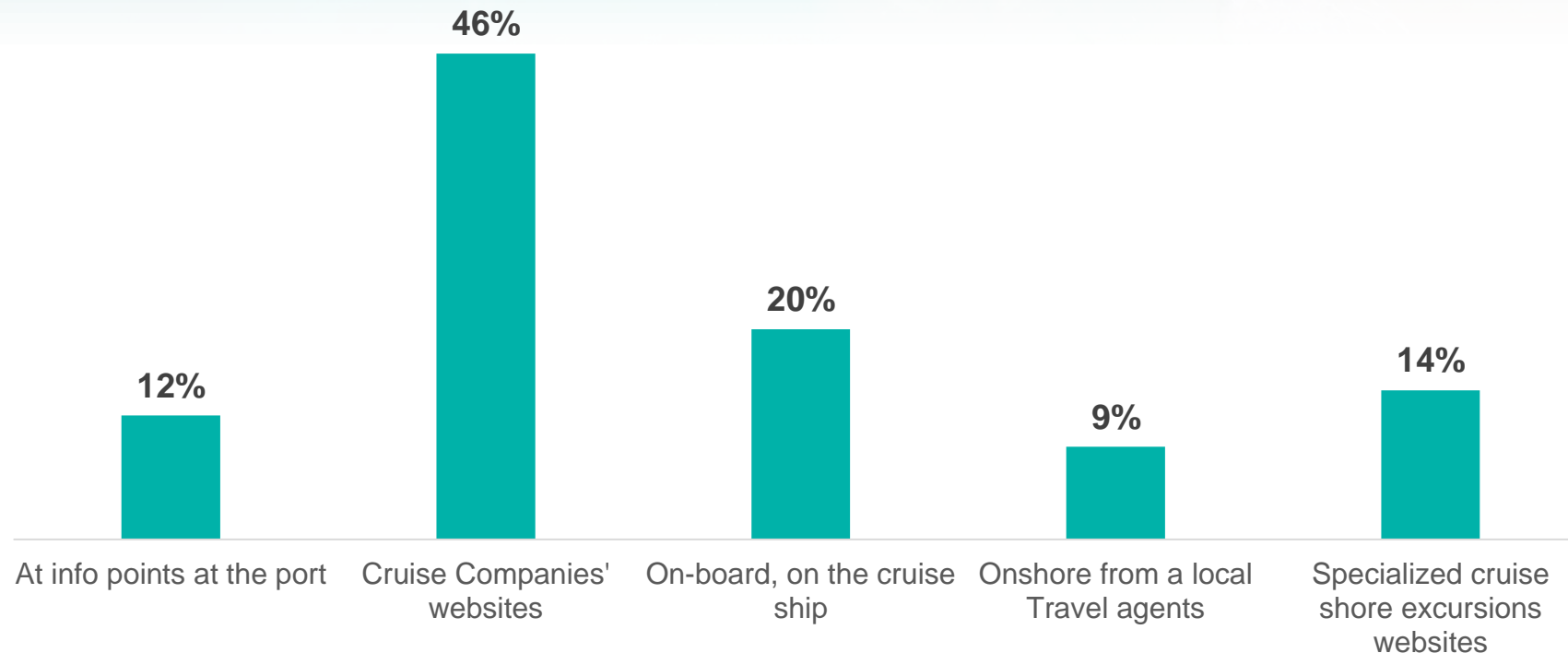
Respondents indicate that they are primarily interested in information about the must-see beaches and how to get around the island.

They are less interested in self-guided tours and popular restaurants.



# Sources for Planning Shore Excursions

Nearly half of respondents (46%) prefer using cruise companies' websites to plan shore excursions, while 20% opt to do so onboard the cruise ship. Additionally, specialized cruise shore excursion websites accounted for 14% of respondents' preferences, suggesting a reliance on official sources for itinerary planning during cruises.

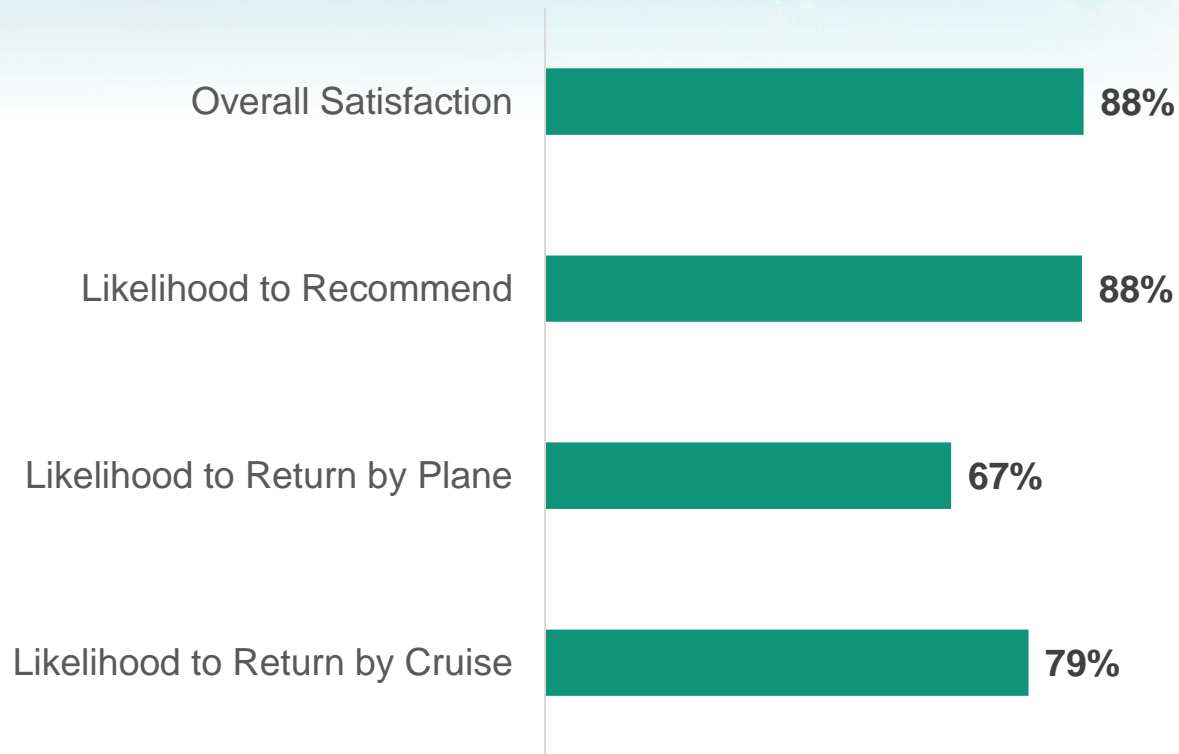


**9.**

# **Net Promoter Score**



# Net Promoter Score

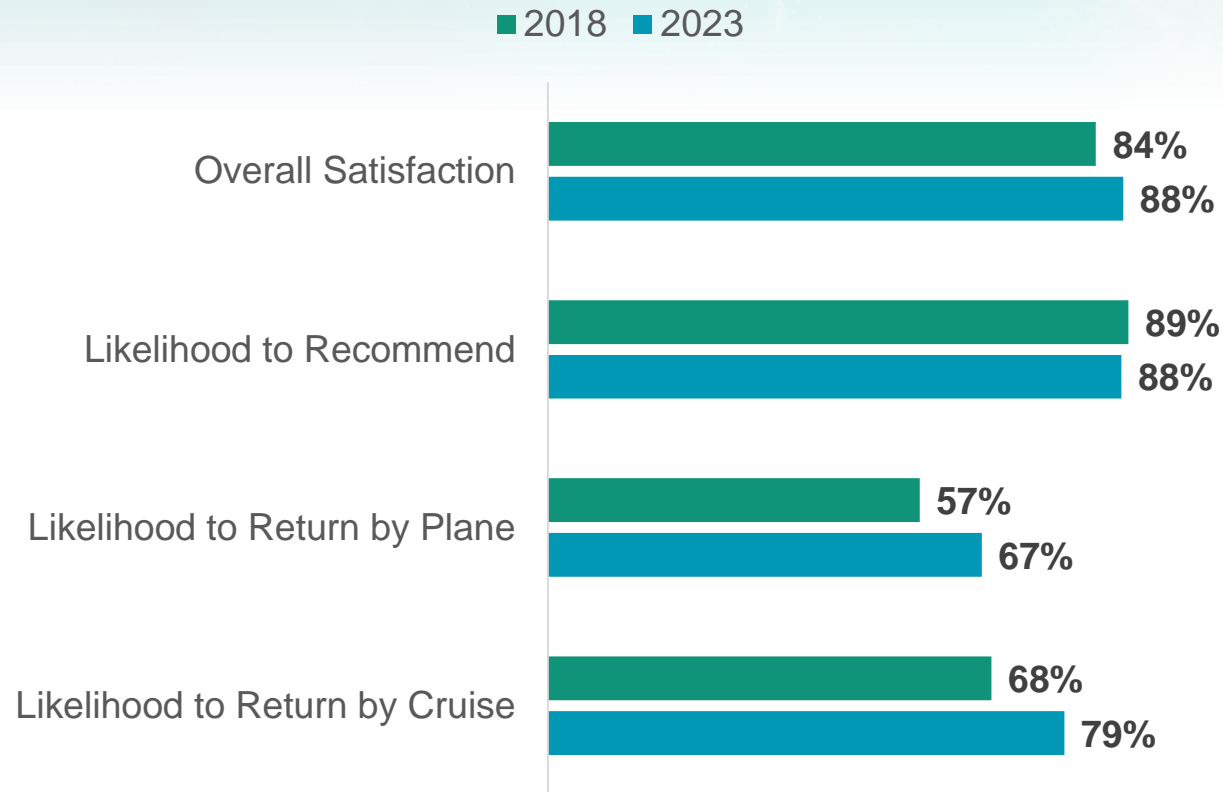


Respondents reported high overall satisfaction (88%) and likelihood to recommend Aruba (88%).

Additionally, while 67% expressed a likelihood to return by plane, 79% indicated a likelihood to return by cruise, suggesting a preference for cruising over air travel among the cruise visitors surveyed.

# Net Promoter Score

Comparison of 2018 vs. 2023



Between 2018 and 2023, overall satisfaction increased by 4%, while the likelihood to recommend remained steady.

However, there were notable rises in the likelihood of returning by plane, increasing by 10%, and by cruise, increasing by 11%.

# Thank You

For additional inquiries on the presented Cruise Survey results, contact  
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