

# Tourist Profile - Year Report 2012



Tourism



# **Tourist Profile – Year Report 2012**



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**CENTRAL BUREAU OF STATISTICS**  
**ORANJESTAD, October 2013**



## PREFACE

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This report presents results of the Tourist Survey done in 2012, executed by the Central Bureau of Statistics, together with survey results of previous years. Data from other sources as Aruba Tourism Authority, (formerly) Cruise Tourism Authority, Department of Immigration at the International Airport of Aruba, Central Bank of Aruba, Caribbean Tourism Organization, etc., are also presented. Much analysis is not really necessary since the tables are self-explanatory and a few are illustrated in graphs also.

Tourism is one of the main economic activities on the island. For that reason the Central Bureau of Statistics, in cooperation with other institutions, has chosen to conduct surveys, mainly to measure fluctuations of tourist expenditures, the satisfaction levels and shifts within demographical market segments. In the System of National Accounts framework, this data is very important for estimating the impact of the Tourism Industry on the islands total economy and the necessity for such data exists for various vital purposes.

The Central Bureau of Statistics (CBS) published the results of several surveys over the years 1996 until now. Among all the Tourist Profiles, they include results of the Tourist Survey for every quarter from 1996 until the end of the year 2012. The realization of the Tourist Survey for the year 2012 was possible thanks to the cooperation and excellent work of the interview-team and the Central Bureau of Statistics Tourism department, which consist of Marleen Barendregt-Croes, Mary Geerman M.A. and Louisette Christiaans-Yarzagaray MSc. (head of the department). Special thanks goes to all other Central Bureau of Statistics staff, principally Marjolene van der Biezen-Marques B.A. and Richard Werleman for their cooperation (technical) during the work process. Most of the results of the Tourist Survey is also available on the CBS website thanks to Cheryl Feliciano MSc.

In the year 2010 the CBS introduced the EEE portable computer system which replaced the scanning process and this data-entry system. Initially these machines were to be used for the Census 2010 project but our survey was chosen as a pilot project prior to the Census 2010. Since then it was decided to switch our data collection method for a digital system. For this the software called CSPro was used, a program specially designed for the editing of databases. The technical assistant that helped the Tourism department with the set-up of this new system was Dr. Frank Eelens and for this we are eternally thankful for all this support and assistance.

Thanks also to all the data-suppliers and supporters who contributed in any other way to this publication. A word of thanks goes also to the hotels who are member of the AHATA, for their cooperation. We would appreciate your cooperation in the future! Last but not least, a word of thanks goes to the Aruba Airport Authority and the U.S. Department of Immigration and Customs for allowing our interview-team to conduct the survey in departure halls.

The Central Bureau of Statistics hopes that this Tourist Profile, Year Report 2012 will provide all the users with necessary information. For any other information that you might need or comments and further information, feel free to contact us. This publication will also be available to the general public and also on the website of the CBS (<http://www.cbs.aw>).

Drs. Martijn Balkestein  
Director of the Central Bureau of Statistics Aruba

## FOREWORD

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In the present and former publications the CBS used the macro-economic concept “Total tourism expenditure”. This concept has been used as an indicator in former publications, but only in the last issues it is presented as an estimated macro-economic variable.

Initially, one of the monetary indicators published by the CBS was the average daily expenditure in Aruba, which is the total consumption expenditure made by a stayover visitor (during his/her stay in Aruba) or on behalf of a visitor for and during his/her trip and stay at a destination. This information is presented per quarter and also a year figure is presented at the conclusion of each year.

To get a better picture of the visitor expenditures in Aruba, the average daily expenditure is multiplied by the average length of stay of the visitors and by the number of corresponding stayover visitors. The result is an estimate of Tourism expenditures in Aruba which indicates the amount of money all visitors left behind in Aruba during their stay in Aruba in a certain year, either per quarter or per year. To bring this figure to a higher stage (a macro total), a total tourism expenditure is estimated. This total tourism expenditure is all the travel related expenditures made by stayover visitors, before, during, and immediately after a trip, which is the tourism expenditure in Aruba plus an estimated accommodation calculation **portion only** of the pre-paid packages up to now. Other components of the pre-paid package expenditures (e.g. F&B) are still not included in the estimated total tourism expenditure. The CBS is planning to calculate this remaining portion of expenditures in the future in order to reach to a complete image of all expenditures related to tourism corresponding to the total economy of Aruba.

Total tourism expenditure measures the total amount of money tourists visiting Aruba in a certain quarter spent in that quarter on tourism related goods and services. The amount of money value stayover visitors spent on tourism related goods and services should ideally be equal to goods and services sold in a certain quarter.

The total tourism expenditure is measured on an accrual basis. Accrual accounting records flows at the time economic value is created, transformed, exchanged, transferred or extinguished. This means that flows which imply a change of ownership are entered when ownership passes, services are rendered when provided, output at the time products are created and intermediate consumption when materials and supplies are being used. The System of National Accounts (SNA) favors accrual accounting because:

- (a) The timing of accrual accounting is in full agreement with the way economic activities and other flows are defined in the System. This agreement allows one, for instance, to evaluate the profitability of productive activities correctly (i.e., without the disturbing influence of leads and lags in cash flows) and to calculate a sectors net worth correctly at any point in time;
- (b) Accrual accounting can be applied to non-monetary flows

The Central Bank of Aruba, on the other hand, measures the tourism receipts. A comparative analysis shows that the concepts of tourism receipts and total tourism expenditure are not identical nor are their methodologies the same. Differences in approach and operational definitions of the two concepts leads to differences in the figures measured. It is therefore methodologically not appropriate to correlate tourism receipts and tourism expenditure with each other, without indicating the difference between these two concepts. It is strongly recommended to users to clearly distinguish tourism receipt from tourism expenditure. For supplementary information please refer to the methodology which is available upon request or online.



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## ***TOURISM INDICATOR SHEET FOR 2012***

	<b><u>2012</u></b>	<b><u>% change</u></b>
Stayover Visitors	903,934	4.0
Cruise Passengers	582,313	-2.9
Total number of Visitors	1,486,247	1.2
Total Visitors Nights	6,949,348	3.9
First Time Visitors (in rel. %)	46.4	-0.9
Repeat Visitors (in rel. %)	53.6	0.8
Visitors that stayed in Hotels (in rel. %)	60.3	4.7
Visitors that stayed in Timesahres (in rel. %)	25.4	-12.1
Visitors that came with a Pre-paid Package (in rel. %)	57.1	10.2
Visitors that came with an All Inclusive Package (in rel. %)	45.9	9.8
Average Daily Expenditure spent in Aruba per person (in US\$)*	84.64	-2.6
Average Expenditure spent in Aruba per person (in US\$)*	638.19	-2.0
Total Tourism Expenditure in Aruba (in US\$)*	576,877,662	1.9
Estimated Total Tourism Expenditure (in US\$)*	854,616,106	2.4
Total Tourism Receipts (in US\$)	1,399,441,340	3.5
Total Occupancy (in %)	79.0	1.7
Hotel Occupancy (in %)	78.7	5.6
Timeshare Occupancy (in %)	79.4	-3.2
Total Average Daily Rate (ADR) (in US\$)	195.07	1.6
Hotel Average Daily Rate (ADR) (in US\$)	200.54	3.7
Timeshare Average Daily Rate (ADR) (in US\$)	157.46	-12.5
Total Revenue per Available Room (Revpar) (in US\$)	91.57	3.8
Hotel Revenue per Available Room (Revpar) (in US\$)	157.83	10.0
Timeshare Revenue per Available Room (Revpar) (in US\$)	19.57	2.6
Total Occupied Rooms Nights	2,008,247	2.4
Total Room Revenues (in US\$)	241,938,862	4.5
Total Lodging Taxes (in US\$)	34,003,352	3.8
Total Casino (Gambling) Taxes (in US\$)	11,223,464	-9.2

**\* Expenditure results are only relevant for Stayover visitors and excludes Cruise visitors**



## INTRODUCTION

The travel and tourism industry is the economic lifeblood of many countries around the world. Tourism is the second biggest industry in terms of the people it employs. Tourism is a human circulation and is considered as consumption. Tourism movements are increasingly of interest as economic, social and cultural events, which annually and on a country basis make one destination more popular than another. Tourism is an important factor for increasing employment and interaction between communities and bringing financial support to economies.

Analyzing and examining the differences in tourism demand in certain periods is of key importance. The aim of this research is to examine the profiles and expectations of visitors coming to Aruba. This report provides vital information on the changing tourism environment in Aruba and it provides key statistics of the stay-over visitors. Mostly it presents survey results of the Tourism Survey by the CBS carried out under the **stayover visitors** plus the supply and use of accommodation by visitors along with a wide range of visitor related numbers including stayover visitor's expenditure patterns.

The following presents a short analysis together with corresponding graphs which include trends, comparisons and percentage changes of what the CBS considers the most important tourism indicators. It gives a general view of how tourism developed in the year 2012 compared to the year 2011 and previous years. In some cases it compares year figures starting from the year 2003. Several other graphs are presented in this section in order to better illustrate significant patterns (trends) in the tourism industry over the last years.

## HIGHLIGHTS IN TOURISM 2012

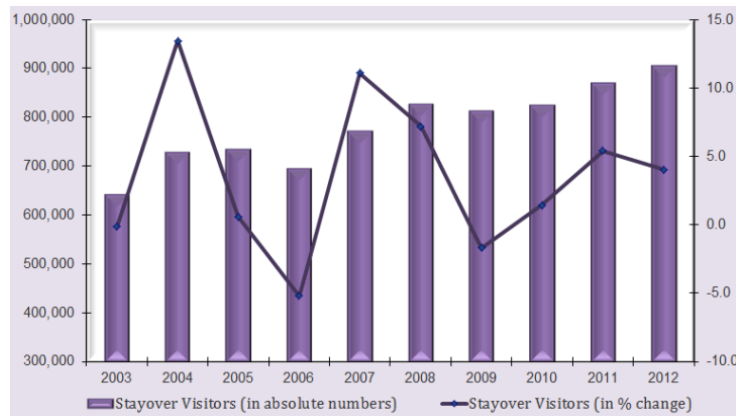
### *Stayover Visitors and Visitors Nights*

The following section presents graphs related to the total number of stayover visitors and their percentage change. Other graphs are related to different mayor visitors markets to Aruba. The following graphs present number of stayover visitors and visitor nights in absolute figures from the years 2003 until 2012, together with their respective percentage changes.

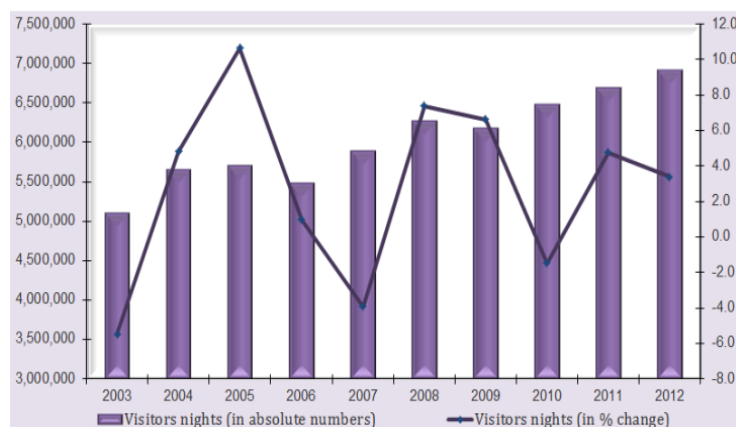
Graph 1 presents the stayover visitors and the percentage change compared to the previous years. In the year 2012, Aruba experienced an increase in the number of stayover visitors of 4.0% compared to the year before. Aruba reached a total of 903.934 stayover visitors which is the highest number ever recorded. The total number of stayover visitors increased in all quarters of the year 2012 compared to 2011.

The fourth quarter of 2012 experienced the highest increase followed by the third quarter, which increased with 7.7% in the fourth quarter and 4.4% respectively in the third quarter of 2012 compared to 2011. The second quarter of 2012 experienced the lowest increase which was 2.0% compared to 2011 which was about the same as the first quarter of 2012 compared to 2011.

**Graph 1. Total number of stayover visitors**



**Graph 2. Total number of visitor nights**

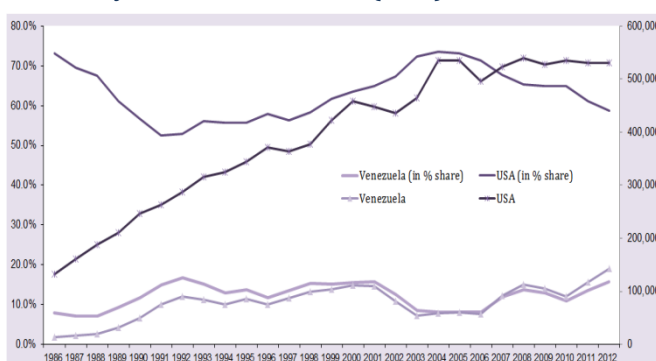




Graph 2 indicates the total number of visitor nights and its percentage change over the years. This indicator experienced increases in all the quarters of 2012 compared to the previous year. In 2012 Aruba had a total of 6,907,143 visitor nights. This represents an increase of 3.3% compared to the year 2011 which had a total of 6,685,807. Total visitor nights experienced the highest increase in the third quarter of 2012 followed by the fourth quarter which increased with 5.4% and 5.1% respectively. The second quarter of 2012 experienced the lowest increase which was 1.3% compared to 2011.

Graph 3 shows how the two major markets of the visitors from the U.S. and Venezuela (in absolute numbers and in percentage of share) fluctuate during the years 1986 to 2012. These two markets represent about 75% of Aruba's total visitors' market in 2012 which stayed practically the same as 2011 with the difference being the shift between the share of the U.S. market and the market of Venezuela. Still this signifies that Aruba is still very reliant on the U.S. and Venezuelan market. The graph also illustrates that the share of the U.S. market and the share of the market of Venezuela move interchangeably, when the U.S. market decreases the market of Venezuela increases and the other way around. In 2012 the market of Venezuela had a market share of 15.8% while the U.S. market had a share of 58.7% to the total stayover visitors' market.

**Graph 3. Market share of Venezuela & the U.S. to the total stayover visitors market (in %)**

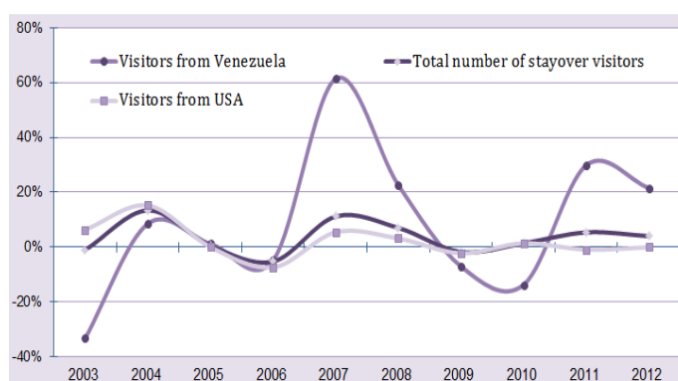


Since the year 2000 up to now, the visitors from the USA and Venezuela together reached market shares between 74.6% and 81.6%. In 2012 the market shares of the US and Venezuelan market together reached its lowest share since 1998 which was 74.6%. The US market alone reached its highest market share in the year 2004 which was 81.6% of the total visitors' market and just reached its lowest market share in the year 2012 since 1999, reaching 58.7% to the total stayover visitors market of Aruba.

The Venezuelan market reached its highest market share of 15.8% in 2012. This was a 2.3% increase in market share compared to 2011 which was 13.6%. The two major markets together reached 74.6% of the total market share in the year 2012 which was 74.7% in the 2011.

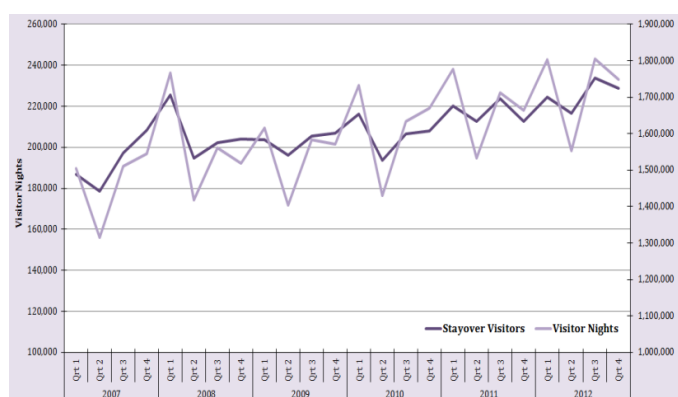
Graph 4 shows the relative percentage growth of the total stayover visitors to Aruba, the U.S. market and the market Venezuela. The U.S. market experienced a slight decrease of 0.03% in 2012 to the total visitors' market and the market of Venezuela experienced a substantial increase of 21.5% compared to 2011. In the graph all these tendencies are visible from the year 2003 onwards. Of the three variables presented in the graph, it is visible that the market of Venezuela fluctuates drastically compared to the total stayover market and the U.S. Market.

**Graph 4. Total stayover visitors market, the market of Venezuela & the U.S. market (in % change)**



Graph 5 display the total number of stayover visitors and the total number visitor nights in absolute numbers by quarter from the year 2007 up to 2012. In this graph seasonal patterns for these two indicators are noticeable. Usually these two indicators move more or less in the same direction even though stayover visitors show a gentler tendency after the year 2008 while visitor nights display a steeper tendency.

**Graph 5. Quarterly stayover visitors & visitor nights**

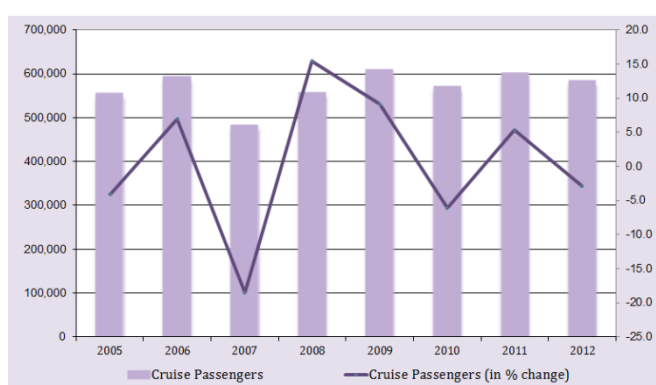




### ***Cruise Passengers and Cruise Calls.***

The following graph shows the total number of cruise passengers in absolute numbers and in percentage change for a range of 8 years starting since the year 2005. Year 2012 experienced a decrease of 2.9% in number of cruise passengers compared to 2011. In 2012 Aruba welcomed a total of 582,313 cruise passengers which is a decrease after an increase of 5.4% in 2011 compared to 2010. It can even be stated that the 2011 number of cruise passengers is the second highest number ever recorded in the history of Aruba. The highest number of cruise passengers reached was 606,768 in the year 2009.

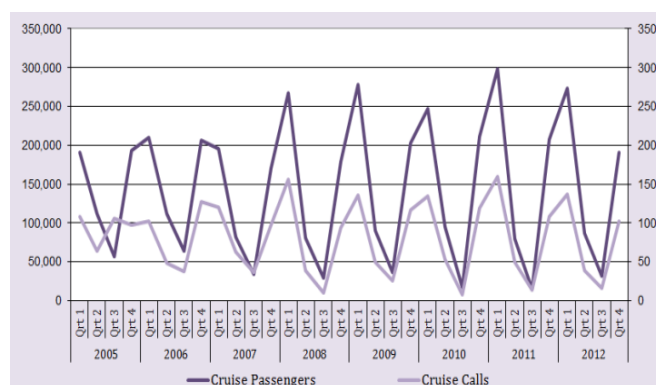
**Graph 6. Total number of cruise passengers**



The next graph notes the absolute number of cruise passengers and the total number of cruise calls by quarter starting from the year 2005 until 2012. Both, the total number of cruise passengers and the total number of cruise calls reflect very constant patterns and move mostly in the same direction. This is mostly due to the constant seasonal patterns which is very evident for both indicators.

Aruba received -11.4% less cruise calls in 2012 compared to the year before reaching a total of 294 cruise calls. This represents 38 less cruise ships which visited our island in 2012. Aruba also received 17,580 less cruise passengers in 2012.

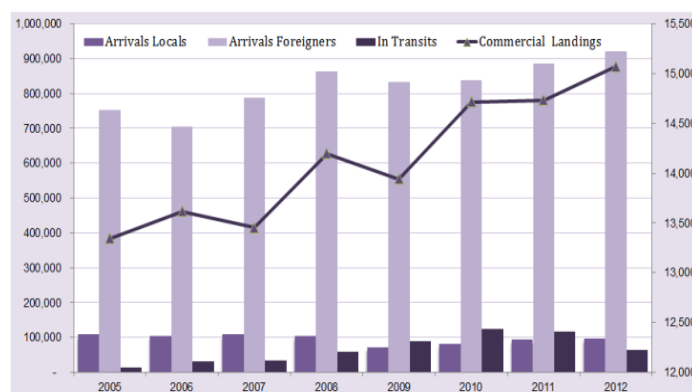
**Graph 7. Total number of cruise passenger & number of cruise calls by quarter**



### ***Airport Traffic and Total Landings.***

This section presents data of the immigration department at the international airport of Aruba. The most important data regarding the airport traffic are presented which are the total local arrival, the total foreigner arrivals and the total number of commercial landings at the airport.

**Graph 8. Total arrivals & total commercial landings at the airport**



Graph 8 presents four indicators: foreign and local arrivals, commercial landings and in transit passengers starting from the year 2005 up to the year 2012. In the following graph the same indicators are presented but now quarterly movements of foreign and local arrivals and commercial landings are visible.

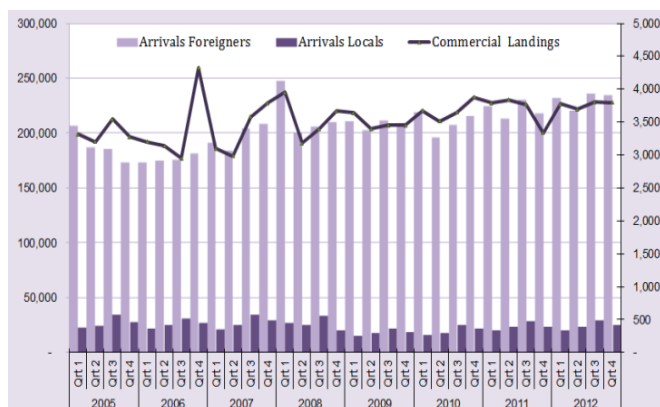
The total number of foreigner arrivals is an indicator which is used to correlate to the total number of stayover visitors. Basically these two numbers should be about equal considering that both measure foreign visitors entering Aruba by air. Take into consideration that the airport counts the number of people arriving and departing from the airport which can represent discrepancies in timing between the registered stayover visitors and the foreign arrivals to Aruba.

Aruba received 4.2% more foreigner arrivals in 2012 compared to 2011 while stayover visitors increased with 4.0%. The total foreign departures at the airport of Aruba increased with 4.4% in 2012 compared to 2011. Total arrivals at the airport, foreigners and locals together, reached a total of 1,020,731 in 2012 while the total departures were 1,034,814. The total number of local arrivals at the airport increased with 3.5% in 2012 compared to 2011 while total local departures in 2012 increased with 3.6%. In transit passengers, on the other hand, declined with 43.9% in 2012 reaching a total of 65,033 while the number of in transit passengers was 115,976 in the year 2011.

The traffic at the airport of Aruba was higher in the year 2012 thanks to more foreign visitors but also due to a higher volume of local people using the airport for travelling purposes.

The following chart also illustrates the number of commercial landings which experienced an increase of 2.3% in 2012 compared to 2011. This increase was mainly caused by an ample increase in the 4<sup>th</sup> quarter of 2012 of 13.8%. Aruba received a total of 15,071 commercial landings in 2012 while Aruba also received a total of 5,472 non-commercial landings at the airport. The non-commercial landing increased considerably with 21.8% in 2012 compared to the previous year.

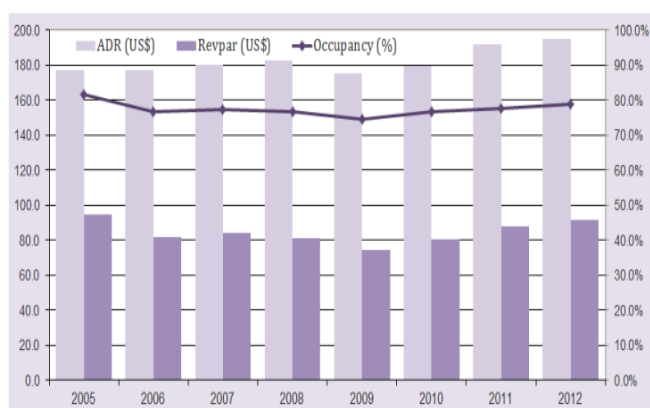
**Graph 9. Arrivals & commercial landings at the airport by quarter**



### Hotel Related Indicators.

The next section presents information regarding the accommodation sector in Aruba, more specifically the hotels and the timeshares and the total of the two which represents the total accommodation industry. The accommodation related statistics presented are the occupancy rate in percentages (Occ. %), average daily rates (ADR) in US dollars and revenue per available room (Revpar) in US dollars.

**Graph 10. Occupancy rates, ADR & Revpar (total)**

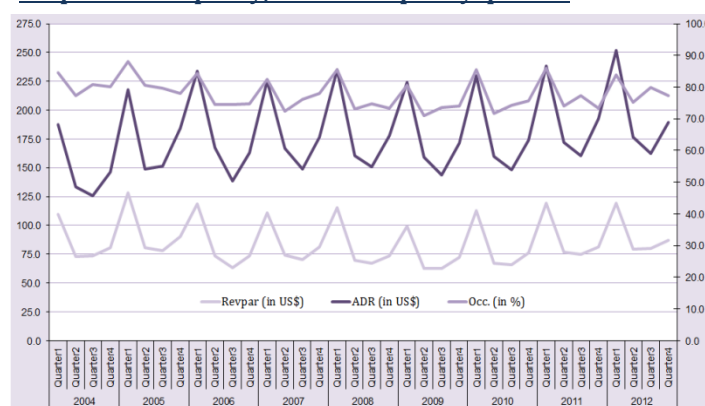


All 3 of the hotel related indicators, Occupancy rate, Revpar and ADR experienced an increase in the year 2012 compared to 2011 as presented in graph 10. Occupancy increased with 1.7% in 2012 compared to the year 2011 reaching an occupancy rate of 79.0%. The ADR for 2012 was US\$195.07 which is 1.6% more than the year before and Revpar was US\$91.57 which also represents an increase of 3.8%.

Occupancy rates experienced increase during the last three quarters of 2012 compared to 2011 and decreased with 2.3% in the first quarter. In the following graph the total occupancy rate, ADR and Revpar per quarter, which is the total for hotels and timeshares together, can be observed from the year 2004 until 2012.

The total average daily rate for the year 2012 was 1.6% more than the year 2011 mainly due to increases in ADR in nearly all the quarters of the year 2012 except for the fourth quarter. Increases in the ADR were 5.8%, 2.8%, and 1.4% respectively for the first to the third quarter except for the fourth quarter of 2012 which experienced a decrease of 1.7%. In the first quarter of 2012 the ADR was US\$251.73 which was the highest ADR in the year 2012. All the ADR's recorded in the year 2012 were the highest ADRs ever recorded by the CBS since 1996 for their respective quarters except for the fourth quarter which the highest ADR was recorded in the fourth quarter of the previous year.

**Graph 11. Occupancy, ADR & Revpar by quarter**



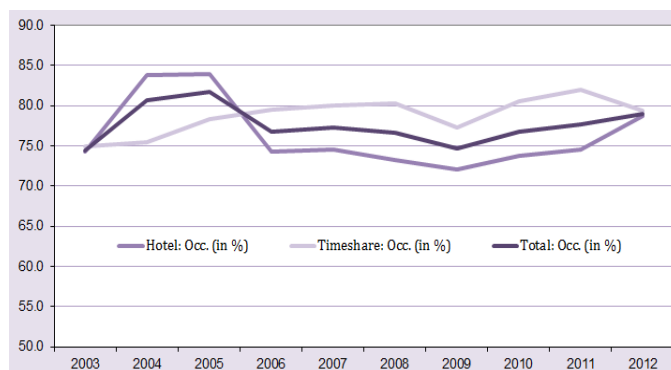
Revpar, which also experienced an increase in 2012, experienced increases in nearly all the quarters of 2012 except for the first quarter which stayed the same as it was in the first quarter of the year before. The highest increase was the fourth quarter of 2012, which increased with 7.4% compared to the fourth quarter 2011. The highest Revpar ever recorded was in the first quarter of 2012 and 2011, reaching US\$119.60.

What can also be seen from this graph is that ADR and Revpar reveal a very regular pattern which also indicates the regular seasonal trend of the

tourism industry in Aruba. The occupancy trend, contrary to the ADR and the Revpar, reveals less sharp increases and less abrupt drops.

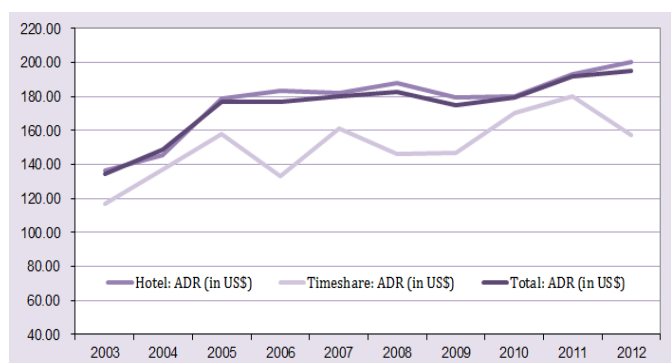
The next 3 graphs show the occupancy rates, ADR and Revpar for hotels, timeshares and the total, which is the total of the two, separately in graphs on a yearly basis starting from the year 2003.

**Graph 12. Occupancy of hotels, timeshares and total**



The occupancy trend shows that since the year 2006 until 2012 timeshare hotels have a higher occupancy than the hotels. Timeshares ended the year 2012 with an average occupancy of 79.4% while hotels had an occupancy rate of 78.7%. Hotels experienced a growth of 5.6% while timeshare experienced a drop of 3.2% in 2012.

**Graph 13. ADR of hotels, timeshare and total**

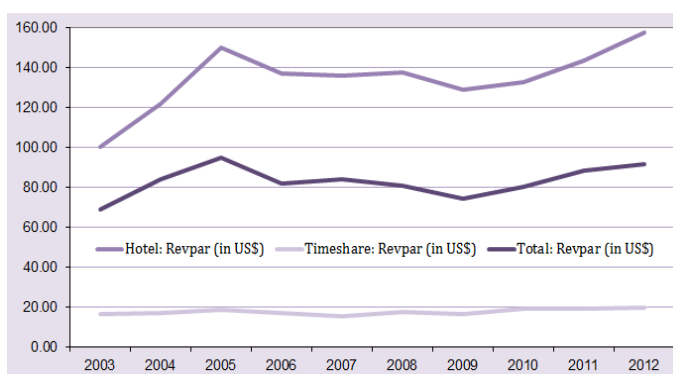


The ADR of the hotels and the total ADR reflect almost the same trends, moving in the same direction and are almost at the same level while the ADR of the timeshares is at a lower level compared to the other two groups. Hotels had an ADR of US\$ 200.54 in 2012 which was 3.7% higher than the previous year. Timeshare had an ADR of US\$ 157.46 in 2012, indicating a decline of 12.5% compared to 2011. The total ADR in 2012 experienced an increase of 1.6% compared to the year before reaching US\$ 195.07.

Revpar of the timeshares was always at a very low level compared to hotels since most timeshare rooms are already sold and only the remaining

inventory is available to be rented out (transient rooms). The Revpar of hotels in 2012 was US\$ 157.46 which experienced a substantial increase of 10.0% compared to the year before. Timeshare, on the other hand, had a Revpar of US\$ 19.57 in 2012 which represents an increase of 2.6% compared to the year 2011.

**Graph 14. Revpar of hotels, timeshares and total**

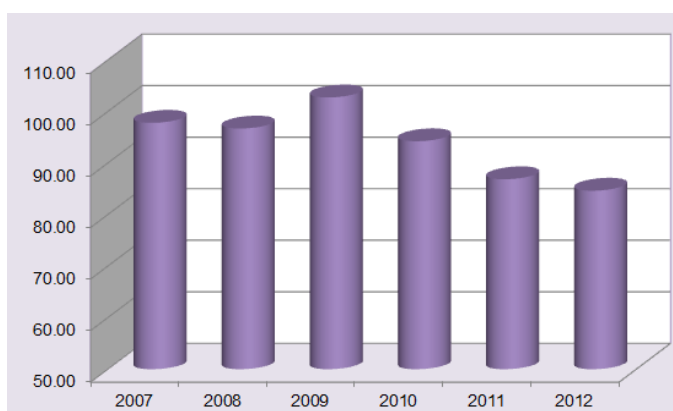


### ***Tourism Related Expenditures.***

Also presented in this section are the tourism related expenditures which are very significant tourism indicators. The indicators include the average daily tourism expenditures (ADEX) that took place in Aruba per stayover visitor, the total tourism expenditures that took place in Aruba, estimated total tourism expenditures calculated by the CBS besides the total tourism receipts reported by the Central Bank of Aruba.

The tourism expenditures reported by the CBS are expenditures that took place in Aruba which indicate the amount of money stayover visitors left behind during their entire stay in Aruba.

**Graph 15. Average daily expenditure in Aruba per person (stayover visitor) per day**

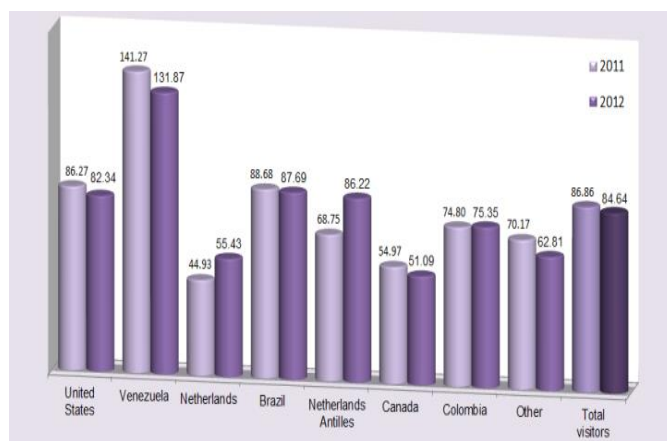


Graph 15 presents the average daily expenditure in Aruba (ADEX) for the years 2007 until 2012. The average daily expenditure is the averages spend per stayover visitor per day while in Aruba in US dollars. Looking at the six years presented, it can be observed that in the year 2009 the average

daily expenditure was the highest among the six years presented reaching US\$102.74. In the year 2012 it dropped to an average of US\$ 84.64 which is a decrease of 2.6% compared to the year 2011. In 2011 the stayover visitors spend an average of US\$86.86 per person per day while in Aruba which also dropped with 7.8% compared to the year before.

Graph 16 illustrates the average daily expenditure of each stayover visitors' market separately. It can be observed that the stayover visitors from Venezuela spend more money on average than the other markets per person per day. They spent an average of US\$131.87 per day in 2012 followed by the market of Brazil, which spends an average of US\$87.69 per person per day and the U.S. market spends an average of US\$82.34. Visitors from Venezuela spend 55.8% more on average than the average expenditure of the total visitors' market.

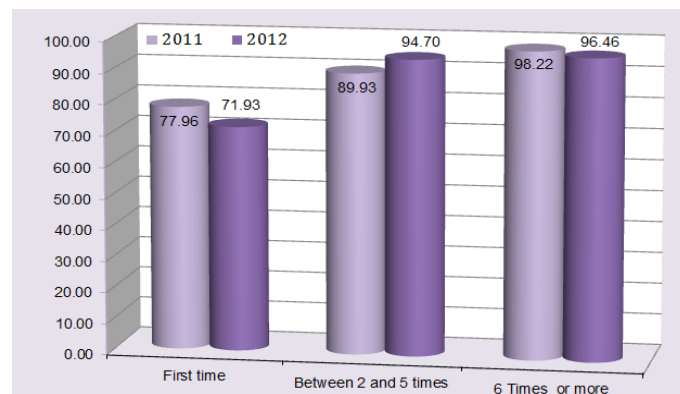
**Graph 16. Average daily expenditure by place of residence**



The next graph (17) shows the average daily expenditure again but this time by the number of visits of the stayover visitors for the years 2011 and 2012. It is clear that in the year 2012 and 2011, visitors who travelled between 2 and 5 times and visitors who travelled 6 times or more to Aruba, spend more than visitors who travel to Aruba for the first time. Stayover visitors who came to Aruba between 2 and 5 times spend an average of US\$ 94.70 per person per day in 2012 which increased with 5.3% compared to the year before. Visitors who visited Aruba 6 times and more in 2012 spend the highest average in this categorization. They spend an average of US\$ 96.46 which is a drop of 1.8% compared to 2011. Visitors who came to Aruba for the first time in 2012 spend US\$71.93 on average while first time visitors who came to Aruba in 2011 spend an average of US\$ 77.96 per person per day while in

Aruba. First time visitors' average spend dropped with 7.7% from 2011 to 2012.

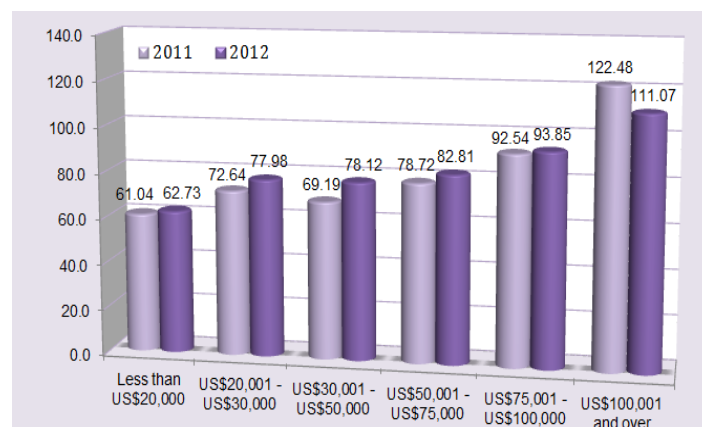
**Graph 17. Average daily expenditure by number of visits**



In graph 18, the average daily expenditure is presented by the different denominations of household income categories indicated by the interviewed stayover visitors in 2012 and 2011. It can be observed that stayover visitors with the income group of US\$ 100,001 and more spend on average more per person per day compared to all the other income groups, followed by visitors with an income between US\$ 75,001 and US\$ 100,000. Visitors with an income higher than US\$ 100,001 spend an average of US\$ 111.07 per person per day while the second largest group, which is the visitors with a household income between US\$ 75,001 and US\$ 100,000, spend an average of US\$ 93.85 per person per day while in Aruba.

There is clearly a correlation between household income and average expenditures in Aruba by the stayover visitors which is also very evident in the graph below. The higher the income levels the higher the stayover visitors spend on average. Furthermore, the fact that expenditures also positively correlates with the number of visits to Aruba of stayover visitors, is a very helpful indicator while determining the optimal market mix for Aruba.

**Graph 18. Average daily expenditure by income level**

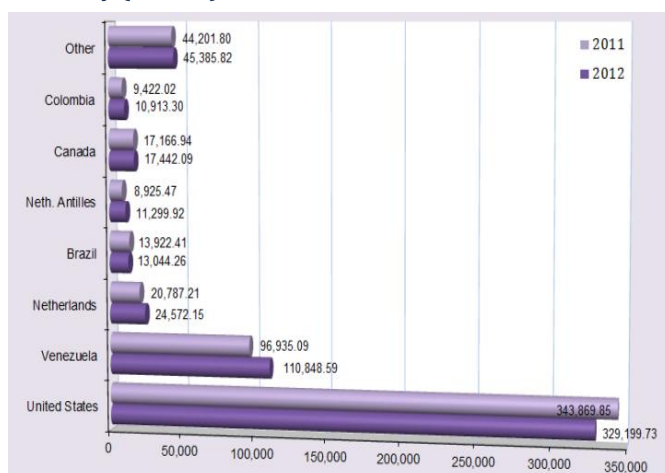




The next graph points to the total tourism expenditures made in Aruba by place of residence of the stayover visitors in 2012 and 2011. The total tourism expenditures encompasses the average daily expenditures times the average length of stay of the visitors times the number of visitors from the respective markets. The fact that the market of visitors from the USA is Aruba's largest market is reflected in the total tourism expenditures as well which can be observed in the graph below. It can be therefore concluded that Aruba's biggest economic contributor related to tourism exports is the market of the USA.

In 2012 Aruba received around US\$ 329.2 million from the visitors from the USA while they were in Aruba, which is 4.2% less than the previous year. In 2011 Aruba received almost 343.7 million US dollars from the stayover visitors from the USA. From the visitors of Venezuela Aruba received about US\$ 110.8 million in 2012 while in Aruba. The total tourism expenditures made in Aruba by stayover visitors reached almost US\$ 577 million in 2012. This amount represents a 1.9% increase in total tourism expenditures in Aruba compared to the year before which was US\$ 566.1 million.

**Graph 19. Total Tourism expenditure in Aruba by country (x 1000)**

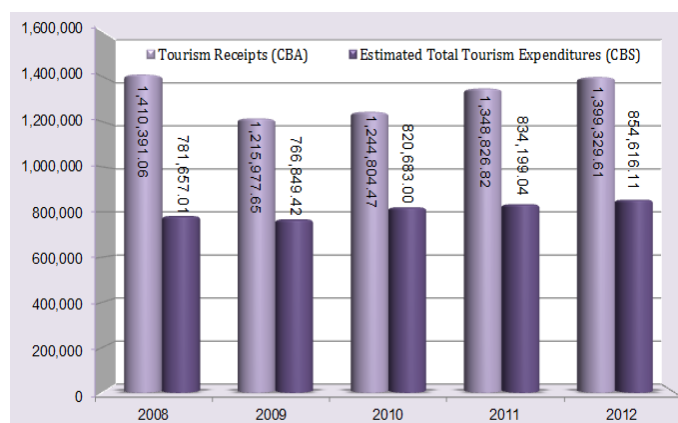


While the markets of the (former) Netherlands Antilles, Netherlands and Colombia experienced increases in 2012 of 27.5%, 19.7% and 18.0% respectively, these increases were contra arrested by decreases in the US market and the market of Brazil of 4.2% and 6.2% respectively.

Notwithstanding an increase of 4.0% in number of stayover visitors in the year 2012, this did not lead to an equal level of increase in total tourism expenditure in Aruba. This has to do with the fact that the average spend by the visitors dropped with 2.6% and that the market of USA did not experience any increase in the year 2012, not in the number of stayover visitors nor in average expenditure per person per day while in Aruba.

Graph 20 depicts the estimated total tourism expenditures reported by the CBS and the total tourism receipts of the Central Bank of Aruba for the years 2008 until 2012. The two indicators are two different types of monetary indicators with two totally different methodologies.

**Graph 20. Estimated total tourism expenditure (CBS) & total tourism receipts (CBA)**



These two indicators are presented together since most of the time they are compared to each other. Estimated total tourism expenditure indicates all travel related expenditures made by stayover visitors, before, during and immediately after a trip. It also includes the accommodation portion (calculated) of a pre-paid package of the stayover visitors. Other components of pre-paid packages are not included at this point. Tourism receipts, on the other hand, include all transactions made in foreign exchange currencies registered by the local banks under the supervision of the Central Bank of Aruba. This implies that the tourism receipts capture all kinds of activities, both from the stayover-, cruise-, and in-transit visitors among other foreign exchange activities.

The year 2012 reflects that Aruba received an estimated total expenditure of US\$ 854.6 million from the stayover visitors which is an increase of 2.4% compared to the year before. Tourism receipts experienced an increase of 3.5% in 2012 compared to 2011, reaching a total of US\$1,399.42 million. The estimated total tourism expenditure increased with 13.1% in the first quarter of 2012 while experiencing a drop in the second quarter with 8.7% compared to the year before. Tourism receipts experienced increases in most the quarters of 2012. Except for the second quarter which experienced a decrease in 2012 compared to 2011 descending with 0.5%.

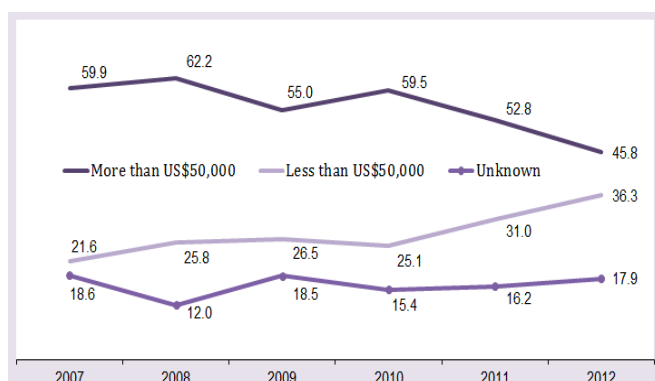
For more information regarding the methodology of these two indicators, please contact the CBS or refer the (online) web page of the CBS.

## Most important Survey Results & Trends.

The CBS is conducting tourist surveys since 1996 every 3<sup>rd</sup> Saturday of the month with a duration of one week every month in the departure Hall of the Queen Beatrix International Airport.

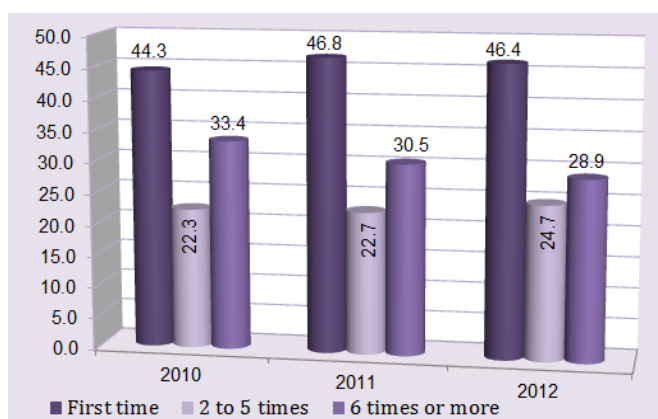
Beside the already presented data of tourism expenditures, which is information extracted from the visitor's survey results, the following also presents the most important observed trends for the year 2012 compared to previous years based on the Visitor's Survey undertaken by the Central Bureau of Statistics.

**Graph 21. Household Income of visitors**



Graph 21 displays the household income of the visitors coming to Aruba separated into visitors with a yearly household income higher than US\$50,000 and visitors with a yearly household income lower than US\$50,000. In the year 2012, 45.8% of the stayover visitors reported to have a yearly household income of US\$ 50,000 or more while 36.3% had an income less than US\$ 50,000. The stayover visitors with a household income over US\$50,000 decreased with 13.3% compared to the year before while the one with a household income below US\$50,000 rose with 17.1%.

**Graph 22. Number of visits to Aruba**

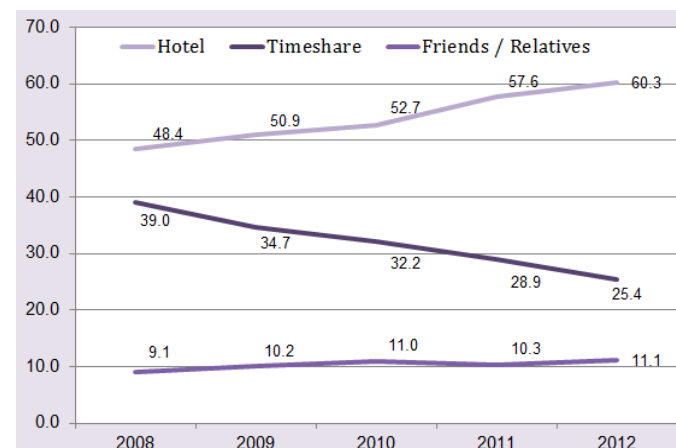


Graph 22 points out to the number of times stayover visitors have come to Aruba. The graph shows an increasing trend for visitors who visited

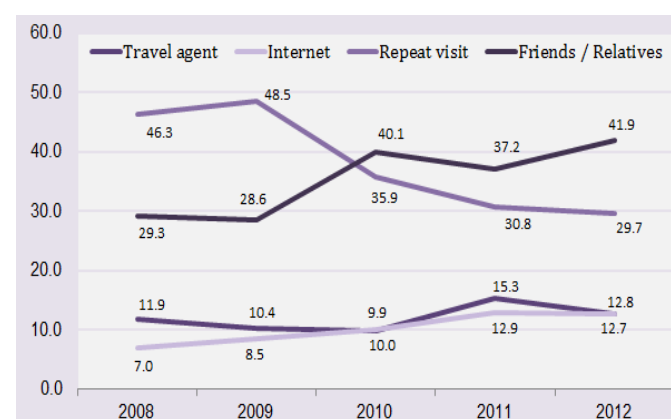
Aruba 2 to 5 times. The number of repeating visitors who came 6 times or more is experiencing declines compared to the previous years presented. Mainly it can be concluded that the trend of visitors who visited Aruba for the first time and 6 times or more decreased with 0.9% and 5.2% respectively in 2012 compared to 2011.

The type of accommodation used by the stayover visitors is also presented in this section. Graph 23 presents only the three main categories of accommodations used by the visitor in the period 2008 till 2012. The number of visitors staying in a timeshare resort decreased from a share of 39.0% in 2008 to 25.4% in 2012 and it decreased with 12.1% compared to 2011. Visitors staying in hotels on the other hand increased from a share of 48.4% in 2008 to 60.3% in 2012 and increased with 4.7% in 2012 compared to 2011.

**Graph 23. Type of accommodation visitors used 2011**



**Graph 24. Most important source of information used**



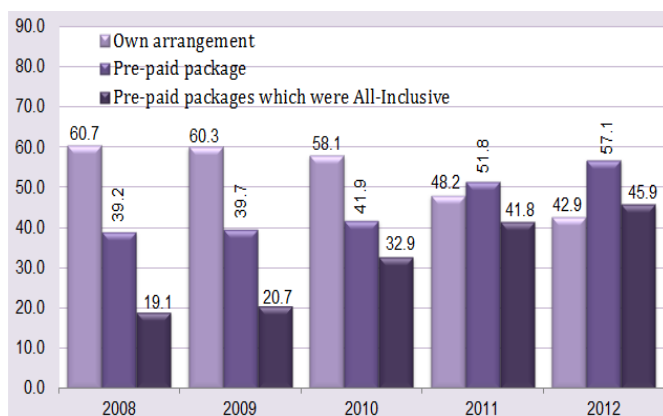
Graph 24 shows which source of information was the most important sources used by the visitors before making a decision to come to Aruba. Only the results for the categories with the highest response rates are presented. Most of the visitors (41.9%) indicated in 2012 that they come to Aruba based on "friends and relatives" as their source of information. This source of information

experienced fluctuations from 29.3% in 2008 to 41.9% in 2012. The next most significant source used by the visitors is their own experience based on repeat visits to Aruba. The result of visitors that responded “repeat visit” is experiencing a decrease from 46.3% in 2008 to 29.7% in 2012.

The percentage of stayover visitors who responded “internet” as a source of information used dropped a little from 12.9% in 2011 to 12.7% in 2012. Visitors using internet increased from 7.0% share in 2008 to 12.7% share in 2012. Another significant source used is “travel agents”. In 2012, 12.8% of the stayover visitors used travel agents as a source before making a decision to visit Aruba which is a 16.3% decline compared to the year before. In 2011, 15.3% of the visitors used travel agencies as a source.

Graph 25 shows the result of the visitors who made their own travel arrangements and of visitors who bought a package deal to come to Aruba. This graph also shows the results of stayover visitors who travelled with a pre-paid package which was an all-inclusive package.

**Graph 25. Travel arrangement of the visitors**



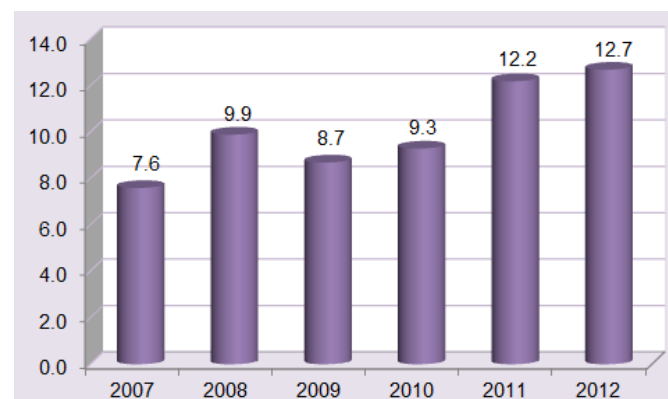
Almost 43.0% of all the interviewed visitors in 2012 made their own travel arrangements, which dropped with 11.0% compared to the year before. The trend of visitors who make their own travel arrangements has been declining over the last 5 years from 60.7% in 2008 to 42.9% in 2012.

On the other hand, visitors coming with a pre-paid package to Aruba increased from 39.2% in 2008 to 57.1% in the 2012, increasing with 10.2% from 2011 to 2012. Of the 57.1% visitors who came with a package in 2012, 45.9% of them came with an all-inclusive package. Visitors who came with

an all-inclusive pre-paid package increased with 9.8% in 2012 compared to the year before.

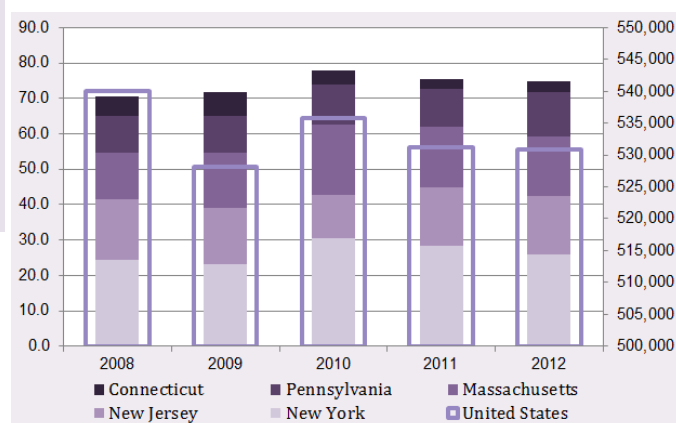
The next graph illustrates the percentage of stayover visitors who have been to Aruba before with a cruise ship prior to this visit. Of all interviewed visitors in 2012, 12.7% of all interviewed population came to Aruba previously by cruise which is 4.1% more than the prior year.

**Graph 26. Visitors who have been to Aruba by Cruise**



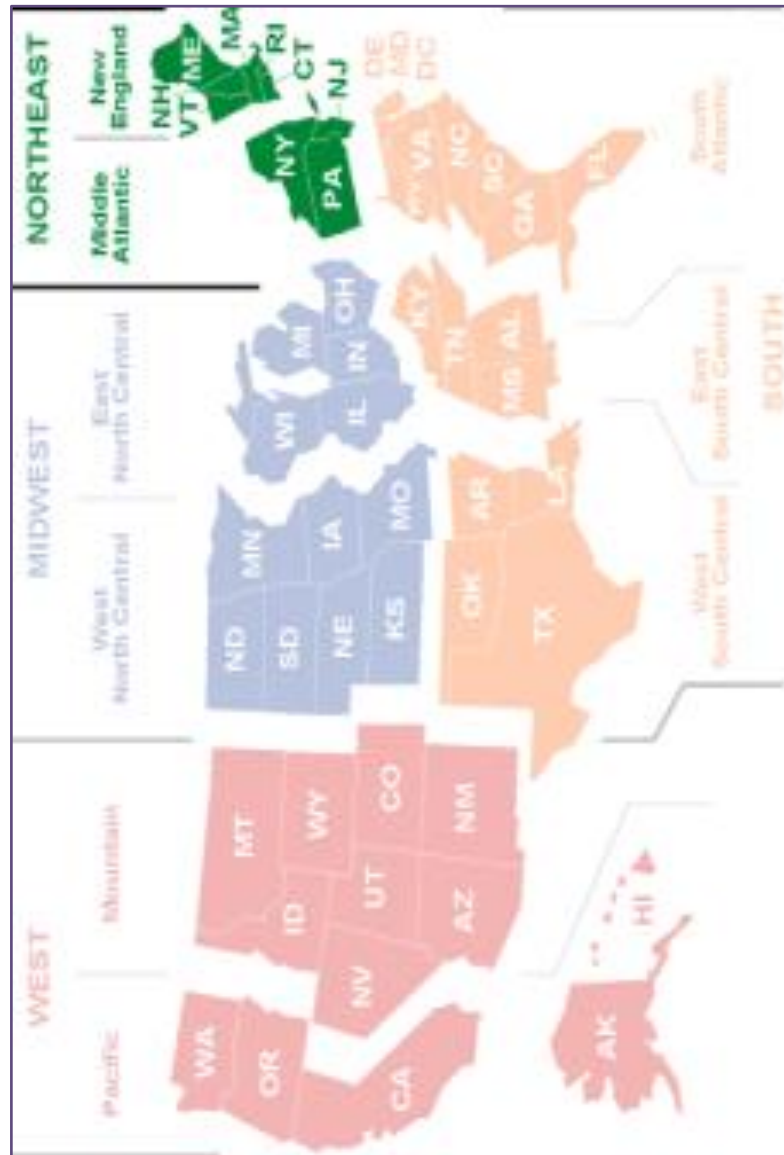
The last graph, displays the number of US stayover visitors by the most significant states of the USA in number of stayover visitors in percentage from 2008 until 2012 while at the same time displaying the total number of stayover visitors from the USA in absolute numbers.

**Graph 27. Travel**



The states of New York, New Jersey, Connecticut Massachusetts and Pennsylvania are the most significant states contributing to the total stayover visitors' market and all these states are located in the Northeast of the USA. These five states in the Northeast represent 74.7% of the total stayover visitors from the USA in 2012 which is a 1.1% decrease compared to 2011.

Not all the results of the survey could be presented in this section of the publication. For additional information, refer to the following section of the publication, which are presentation of most of the results of the survey in table form.





## Tables of Year Results

### 2. TOURISM IN ARUBA

#### 2.1 NUMBER OF STAYOVER VISITORS BY PLACE OF RESIDENCE

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b>Total Visitors</b>	<b>826,677</b>	<b>812,623</b>	<b>824,330</b>	<b>868,973</b>	<b>903,934</b>	<b>5.4</b>	<b>4.0</b>
United States	540,033	528,223	535,753	531,130	530,950	-0.9	0.0
Venezuela	112,986	105,063	90,709	117,838	143,201	29.9	21.5
Netherlands	41,874	41,211	40,294	40,068	39,973	-0.6	-0.2
Netherlands Antilles	21,992	21,536	23,363	25,773	27,361	10.3	6.2
Colombia	13,439	15,685	15,004	16,703	18,127	11.3	8.5
Brazil	8,745	10,594	20,235	22,413	21,070	10.8	-6.0
Canada	32,530	33,856	37,643	40,487	45,887	7.6	13.3
Argentina	4,195	5,486	6,365	10,326	12,865	62.2	24.6
Germany	5,125	3,357	3,568	3,493	4,054	-2.1	16.1
Rest of Europe	13,094	11,742	13,889	15,841	16,673	14.1	5.3
So - Cent. America	4,153	4,723	4,343	5,073	5,387	16.8	6.2
United Kingdom	8,971	11,512	14,530	13,870	13,712	-4.5	-1.1
Surinam	2,376	3,651	3,556	4,220	5,117	18.7	21.3
Rest of the World	17,164	15,984	15,078	21,738	19,557	44.2	-10.0

Source: Aruba Tourism Authority (ATA)

#### 2.2 CRUISE PASSENGERS

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Number of passengers	556,090	606,768	569,424	599,973	582,313	5.4	-2.9
Number of calls	299	327	314	332	294	5.7	-11.4
Number of crew members	235,466	254,709	235,869	249,752	233,327	5.9	-6.6
Avg. no. of passengers / ship	1,860	1,856	1,813	1,807	1,981	-0.3	9.6

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

#### 2.3 TOTAL NUMBER OF VISITORS

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Total stayover visitors	826,677	812,623	824,330	868,973	903,934	5.4	4.0
Total cruise visitors	556,090	606,768	569,424	599,973	582,313	5.4	-2.9
<b>Total number of visitors</b>	<b>1,382,767</b>	<b>1,419,391</b>	<b>1,393,754</b>	<b>1,468,946</b>	<b>1,486,247</b>	<b>5.4</b>	<b>1.2</b>

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

#### 2.4 AVERAGE LENGTH OF STAY BY PLACE OF RESIDENCE OF VISITORS TO ARUBA ( In days )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
United States	7.8	7.6	7.5	7.5	7.5	-0.1	0.0
Venezuela	6.2	5.7	5.9	5.9	5.9	0.3	0.0
Netherlands	13.2	12.8	12.5	11.1	11.1	-10.9	0.0
Brazil	6.5	6.2	6.6	7.1	7.1	6.5	0.0
Netherlands Antilles	5.2	5.1	4.9	4.8	4.8	-2.2	0.0
Canada	8.4	8.0	7.7	7.4	7.4	-3.0	0.0
Colombia	8.2	7.8	9.0	8.0	8.0	-10.8	0.0
Other	11.4	10.5	9.7	9.3	9.3	-4.6	0.5
<b>Avg. length of stay</b>	<b>8.1</b>	<b>7.7</b>	<b>7.7</b>	<b>7.5</b>	<b>7.5</b>	<b>-1.8</b>	<b>0.0</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 2.5 NUMBER OF VISITOR NIGHTS BY PLACE OF RESIDENCE ( \* 1,000 )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b>Total Visitor Nights</b>	<b>6,119.15</b>	<b>6,034.59</b>	<b>6,325.37</b>	<b>6,685.78</b>	<b>6,907.14</b>	<b>5.7</b>	<b>3.3</b>
United States	3,970.35	3,888.87	3,951.90	3,920.1	3,915.34	-0.8	-0.1
Venezuela	655.48	612.03	670.16	772.9	903.55	15.3	16.9
Netherlands	522.52	515.66	494.04	472.2	482.88	-4.4	2.3
Netherlands Antilles	125.85	113.35	119.82	125.3	139.66	4.6	11.5
Colombia	131.00	128.74	145.02	169.5	172.65	16.9	1.9
Brazil	56.28	67.94	127.29	141.6	133.56	11.2	-5.7
Canada	280.01	295.18	325.14	345.6	390.28	6.3	12.9
Argentina	35.92	46.07	53.28	86.8	111.98	63.0	29.0
Germany	49.17	39.52	37.78	37.8	41.49	0.1	9.7
Rest of Europe	120.57	121.86	155.34	170.4	182.66	9.7	7.2
So - Cent. America	36.83	27.92	32.60	32.4	35.81	-0.6	10.5
United Kingdom	111.61	145.34	183.83	162.8	161.57	-11.4	-0.8
Surinam	23.57	32.11	29.18	36.2	39.56	24.0	9.4
Rest of the World	148.92	138.32	137.64	212.28	196.14	54.2	-7.6

Source: Aruba Tourism Authority (ATA)

## 2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Arrived	967,710	906,644	919,281	980,544	1,020,731	6.7	4.1
Foreign Arrivals	105,511	73,106	81,721	95,418	98,753	16.8	3.5
Local Arrivals	862,199	833,538	837,560	885,126	921,978	5.7	4.2
Departed	947,387	924,282	939,359	992,501	1,034,814	5.7	4.3
In transit	58,462	88,476	125,531	115,976	65,033	-7.6	-43.9
<b>Total Traffic</b>	<b>1,973,559</b>	<b>1,919,402</b>	<b>1,984,171</b>	<b>2,089,021</b>	<b>2,120,578</b>	<b>5.3</b>	<b>1.5</b>

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

## 2.7 AIRCRAFT LANDINGS

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Commercial landings	14,196	13,941	14,715	14,732	15,071	0.1	2.3
Non-commercial landings	4,367	4,998	4,382	4,493	5,472	2.5	21.8
<b>Total</b>	<b>18,563</b>	<b>18,939</b>	<b>19,097</b>	<b>19,225</b>	<b>20,543</b>	<b>0.7</b>	<b>6.9</b>

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

## 2.8 STAYOVER VISITORS BY CARRIER

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Air Canada	0	0	425	6,972	7,235	1,540.5	3.8
Air Tran Air	0	0	1,258	28,273	51,569	2,147.5	82.4
Aires	777	748	294	0	0	-100.0	0.0
American Airlines	158,467	123,844	120,106	106,187	86,530	-11.6	-18.5
American Eagle	7,001	0	0	0	0	0.0	0.0
Arkefly	12,131	14,945	13,962	16,208	16,188	16.1	-0.1
Avianca	25,107	21,410	23,105	27,045	26,535	17.1	-1.9
Aserca	26,813	15,727	14,436	16,595	24,174	15.0	45.7
Avior	21,772	17,456	7,575	6,550	5,888	-13.5	-10.1
Charters	65,072	51,107	59,096	48,389	43,255	-18.1	-10.6
Continental	83,593	85,158	96,801	92,873	17,968	-4.1	-80.7
Copa Airlines	277	10,833	10,665	14,070	22,756	31.9	61.7
Cruiseship / Ferry	126	765	2,114	2,252	40	6.5	-98.2
DAE	24,862	25,205	20,978	15,914	20,544	-24.1	29.1
Delta	60,596	82,873	76,336	70,285	67,119	-7.9	-4.5
Gol			8,606	14,678	13,259	70.6	-9.7
Insel	11,527	11,657	20,123	35,260	38,877	75.2	10.3
Jet Blue	90,232	106,664	116,635	125,982	133,119	8.0	5.7
Laser	0	0	0	2,920	15,812	0.0	441.5
Private airplanes	8,853	3,937	8,741	8,825	12,790	1.0	44.9
Suriname Airways	2,730	4,682	5,241	6,106	5,303	16.5	-13.2
KLM	26,621	5,097	6,531	11,640	26,218	78.2	125.2
La Venezolana	13,755	44,050	31,814	35,545	23,525	11.7	-33.8
Martinair	7,391	21,093	21,925	13,913	0	-36.5	-100.0
Santa Barabara	6,594	628	0	0	0	0.0	0.0
Spirit Airlines	1,555	5,159	4,743	6,011	4,925	26.7	-18.1
Sunwig airlines	0	0	0	1,193	13,040		993.0
Tiara	22,984	21,232	25,841	29,429	38,769	13.9	31.7
United Airways	38,956	22,954	23,770	22,076	94,819	-7.1	329.5
US Airways	108,886	114,603	102,549	94,268	91,574	-8.1	-2.9
Varig	0	794	655	0	136	-100.0	0.0
Other	0	0	5	9,514	1,967	0.0	-79.3
<b>Total Visitors</b>	<b>826,678</b>	<b>812,621</b>	<b>824,330</b>	<b>868,973</b>	<b>903,934</b>	<b>5.4</b>	<b>4.0</b>

Source: Aruba Tourism Authority (ATA)

### 3. VISITOR'S PROFILE

#### 3.1. CHARACTERISTICS OF THE VISITORS

##### 3.1.1 AGE GROUPS OF THE VISITORS ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Under 20 yrs	0.3	0.5	0.6	0.8	2.2	33.3	175.0
20 - 29 yrs	8.1	8.5	9.2	6.2	8.4	-32.6	35.5
30 - 39 yrs	17.0	17.2	20.3	23.2	25.2	14.3	8.6
40 - 49 yrs	28.2	25.3	24.3	26.7	29.8	9.9	11.6
50 - 64 yrs	32.9	33.9	32.4	30.3	24.4	-6.5	-19.5
Over 65 yrs	13.4	14.5	13.2	12.7	10.1	-3.8	-20.5
Unknown	0.0	0.0	0.1	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.2 YEARLY HOUSEHOLD INCOME OF THE VISITORS ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Less than US\$20,000	5.3	5.9	5.3	6.8	7.0	28.3	2.9
US\$20,001 - US\$30,000	5.1	5.9	5.5	8.0	9.0	45.5	12.5
US\$30,001 - US\$50,000	15.4	14.7	14.3	16.2	20.3	13.3	25.3
US\$50,001 - US\$75,000	31.5	27.9	30.0	25.0	21.7	-16.7	-13.2
US\$75,001 - US\$100,000	16.9	13.1	15.3	12.7	11.6	-17.0	-8.7
US\$100,001 and over	13.8	14.0	14.2	15.1	12.5	6.3	-17.2
Unknown	12.0	18.5	15.4	16.2	17.9	5.2	10.5
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.3 OCCUPATION OF THE VISITORS ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Legislators, senior officials and managers	12.8	13.7	13.5	14.5	12.3	7.4	-15.2
Professionals	18.7	18.0	18.7	18.9	19.7	1.1	4.2
Technicians and associate professionals	14.6	15.8	11.7	6.5	6.9	-44.4	6.2
Clerks	7.0	6.4	4.9	7.3	6.8	49.0	-6.8
Service workers, shop & market sales workers	7.1	5.2	4.2	4.8	6.9	14.3	43.8
Not economically active (Retired)	33.1	35.4	42.3	44.1	42.6	4.3	-3.4
Skilled agricultural and fishery workers	3.0	2.9	0.2	0.2	0.1	0.0	-50.0
Craft and related trades workers	1.4	1.3	2.1	1.6	2.0	-23.8	25.0
Plant and machine operators and assemblers	1.2	0.8	0.9	0.7	1.0	-22.2	42.9
Elementary occupations	0.3	0.3	1.5	0.9	1.2	-40.0	33.3
Armed forces	0.8	0.3	0.1	0.1	0.2	0.0	100.0
Unknown	0.0	0.0	0.0	0.4	0.3	0.0	-25.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.4 METHOD VISITORS USED TO BOOK A TRIP ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b>In person in General</b>	18.2	17.4	19.7	26.6	29.3	35.0	10.2
<b>By telephone in General</b>	25.4	24.3	20.6	13.6	10.7	-34.0	-21.3
Travel Agent (In Pers/Tel.)	28.4	25.0	21.2	24.9	26.8	17.5	7.6
Tour Operator (In Pers/Tel.)	0.4	0.8	0.8	0.2	0.3	-75.0	50.0
Hotel Direct (In Pers/Tel.)	0.6	1.2	3.6	3.4	3.9	-5.6	14.7
Airline Direct (In Pers.Tel.)	13.7	14.7	16.7	12.5	10.1	-25.1	-19.2
<b>Online in General</b>	51.5	55.2	53.5	55.8	55.9	4.3	0.2
On-Line Tour Operator	21.0	21.9	22.2	28.0	29.5	26.1	5.4
On-Line Hotel Direct	6.9	7.7	6.7	4.0	3.5	-40.3	-12.5
On-Line Airline Direct	22.7	24.8	24.0	19.4	15.5	-19.2	-20.1
<b>Other</b>	5.0	7.1	7.4	8.9	11.3	20.3	27.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.1.5 VISITORS THAT HAVE BEEN TO ARUBA BY CRUISE AND VISITOR THAT HAVE BEEN TO THE CARIBBEAN PRIOR TO THIS VISIT ( In Percentages )

		Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
To Aruba by cruise	Yes	9.9	8.7	9.3	12.2	12.7	31.2	4.1
	No	90.1	91.3	90.6	87.8	87.3	-3.1	-0.6
Prior visit to the Caribbean	Yes	84.3	83.1	78.0	80.0	78.2	2.6	-2.3
	No	15.7	16.9	22.0	19.9	21.8	-9.5	9.5

Source: Tourist Survey - Central Bureau of Statistics - Aruba

## 3.2. BEHAVIOR OF THE VISITORS

### 3.2.1 NUMBER OF VISITS TO ARUBA ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
First time	35.3	37.1	44.3	46.8	46.4	5.6	-0.9
2 to 5 times	28.2	27.5	22.3	22.7	24.7	1.8	8.8
6 times or more	36.5	35.4	33.4	30.5	28.9	-8.7	-5.2
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.2 PURPOSE OF VISIT ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Vacation	90.2	90.6	90.3	90.3	90.4	0.0	0.1
Honeymoon	3.2	2.7	2.6	2.5	2.7	-3.8	8.0
Visit friends / relatives	3.5	3.6	4.4	4.7	4.5	6.8	-4.3
Business / leisure	1.2	1.0	0.7	0.6	0.7	-14.3	16.7
Other <sup>1)</sup>	0.6	1.0	0.8	0.8	0.7	0.0	-12.5
Business only / Convention	0.3	0.3	0.6	0.5	0.5	-16.7	0.0
Wedding	0.3	0.3	0.4	0.3	0.4	-25.0	33.3
Events/Festivals	0.6	0.5	0.1	0.1	0.1	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

<sup>1)</sup> Other also include incentive and golf

### 3.2.3 TYPE OF ACCOMMODATION USED BY THE VISITORS ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Hotel	48.4	50.9	52.7	57.6	60.3	9.3	4.7
Timeshare	39.0	34.7	32.2	28.9	25.4	-10.2	-12.1
Guest house/Apartment	2.5	3.1	2.5	2.3	2.4	-8.0	4.3
Friends / Relatives	9.1	10.2	11.0	10.3	11.1	-6.4	7.8
Own House	0.8	0.6	0.8	0.4	0.5	-50.0	25.0
Condominium	0.1	0.0	0.3	0.0	0.0	-100.0	0.0
Other	0.3	0.6	0.4	0.4	0.3	0.0	-25.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.4 TRAVEL ARRANGEMENT OF THE VISITORS - ALL-INCLUSIVE PACKAGES ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Pre-paid package	39.2	39.7	41.9	51.8	57.1	23.6	10.2
Own arrangement	60.7	60.3	58.1	48.2	42.9	-17.0	-11.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Pre-paid packages which were All-Inclusive	19.1	20.7	32.9	41.8	45.9	27.1	9.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.5 SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING A DECISION TO VISIT ARUBA (In Percentages)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Friends / Relatives	29.3	28.6	40.1	37.2	41.9	-7.2	12.6
Travel agent	11.9	10.4	9.9	15.3	12.8	54.5	-16.3
Newspaper / magazine	1.2	0.6	0.4	0.5	0.0	25.0	-100.0
Television ad / Radio ad	0.3	0.0	0.1	0.2	0.0	100.0	-100.0
Tourist board	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Other	1.6	1.5	1.8	1.4	1.4	-22.2	0.0
Repeat visit	46.3	48.5	35.9	30.8	29.7	-14.2	-3.6
Cruise	0.9	0.7	0.8	0.8	0.5	0.0	-37.5
Internet	7.0	8.5	10.0	12.9	12.7	29.0	-1.6
Business	1.2	1.1	1.0	0.9	1.0	-10.0	11.1
Unknown	0.1	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.6. USERS OF TIMESHARE PROPERTIES: OWNERS VS. NON-OWNERS ( In Percentage of total timeshare users )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Owner	64.4	61.4	62.1	63.7	64.9	2.6	1.9
<i>Non-timeshare owner:</i>							
Non-owner: Transient (Walk-in)	4.4	5.8	3.3	3.1	3.8	-7.2	22.6
Non-owner: Exchange	13.3	15.1	11.4	14.4	9.8	26.3	-31.9
Non-owner: Other	17.1	17.5	23.2	18.8	21.6	-19.0	14.9
Unknown	0.8	0.2	0.0	0.0	0.0	0.0	0.0
<b>Total Timeshare user</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.7 TYPE OF FLIGHT USED BY THE VISITORS ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Charter	7.9	2.7	5.0	2.3	3.3	-54.0	43.5
Scheduled	92.0	97.3	94.9	97.7	96.7	3.0	-1.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

\* n.a. = data not available

## 3.2.A. CHARACTERISTICS OF THE VISITORS FROM THE U.S.A.

### 3.2.A.1 VISITORS FROM THE UNITED STATES BY THE MAJOR STATES ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b>United States</b>	<b>540,033</b>	<b>528,223</b>	<b>535,753</b>	<b>531,130</b>	<b>530,950</b>	<b>-0.9</b>	<b>0.0</b>
New York	24.3	23.3	30.5	28.5	25.9	-6.7	-9.0
New Jersey	17.1	15.6	12.3	16.5	16.7	34.3	0.8
Massachusetts	13.1	15.7	19.8	17.1	16.8	-13.7	-1.6
Pennsylvania	10.6	10.4	11.4	10.8	12.3	-5.9	14.6
Connecticut	5.5	6.8	3.7	2.7	3.0	-26.5	10.6
Ohio	1.6	1.4	2.9	1.5	1.3	-50.2	-11.6
Maryland	1.8	1.5	0.7	1.2	1.0	74.2	-16.5
Michigan	1.6	1.1	1.1	0.9	0.6	-14.3	-30.0
Illinois	3.0	3.8	2.3	4.3	4.3	88.1	1.2
Florida	2.5	3.1	3.2	2.1	2.7	-35.8	27.9
North Carolina	1.4	1.7	0.7	2.9	1.3	290.4	-55.8
New Hampshire	1.2	1.8	1.3	0.8	0.9	-38.0	11.3
Other States	16.3	14.3	10.1	10.9	13.2	7.9	21.1

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.A.2 NUMBER OF VISITS OF VISITORS FROM THE UNITED STATES TO ARUBA ( In Percentages )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
First time	35.5	37.1	44.3	46.8	44.1	5.6	-5.8
2 to 5 times	28.2	27.5	22.3	22.7	24.3	1.8	7.0
6 times or more	36.5	35.4	33.4	30.5	31.6	-8.7	3.6
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3. SATISFACTION OF THE VISITORS

#### 3.3.1 AGREEMENT OR DISAGREEMENT OF THE VISITORS WITH THE FOLLOWING STATEMENTS (In %)

	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree	Don't know
<b>2011</b>						
Aruba is a safe place to visit	71.3	28.4	0.0	0.0	0.0	0.3
People are friendly/hospitable	58.5	40.7	0.7	0.1	0.0	0.1
Aruba is clean	35.2	60.2	3.1	1.2	0.2	0.2
Aruba has nice beaches	77.4	22.3	0.0	0.0	0.0	0.3
Aruba has pleasant weather	60.3	38.4	1.0	0.2	0.0	0.1
Aruba has good attractions	21.1	74.0	2.3	0.1	0.0	2.5
Aruba has good nightlife	19.1	51.6	13.9	1.2	0.2	14.0
Aruba has good hotels	50.5	47.3	0.1	0.0	0.0	2.1
Aruba is expensive	11.9	45.0	27.2	14.8	0.2	0.9
<b>2012</b>						
Aruba is a safe place to visit	66.6	32.6	0.2	0.0	0.0	0.4
People are friendly/hospitable	49.3	49.4	1.3	0.0	0.0	0.0
Aruba is clean	21.4	70.0	6.5	1.6	0.4	0.2
Aruba has nice beaches	77.8	22.2	0.0	0.0	0.0	0.0
Aruba has pleasant weather	45.5	53.1	1.2	0.1	0.0	0.0
Aruba has good attractions	17.5	76.5	3.6	0.1	0.0	2.3
Aruba has good nightlife	12.6	58.3	8.2	0.5	0.1	20.3
Aruba has good hotels	37.2	59.7	0.3	0.0	0.0	2.8
Aruba is expensive	8.4	44.6	32.4	12.9	0.1	1.6

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 3.3.2 RATING OF SERVICE RELATED TO THE FOLLOWING:

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b><u>ACCOMMODATION</u></b>							
Excellent	74.7	71.9	75.0	77.6	76.7	3.5	-1.2
Good	18.8	22.7	21.2	20.3	22.1	-4.2	8.9
Average	3.3	4.2	1.8	0.8	0.6	-55.6	-25.0
Poor	0.2	0.3	0.2	1.2	0.0	500.0	-100.0
Unknown / n.a.	3.1	1.0	1.8	0.1	0.6	-94.4	500.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>MEALS &amp; DRINKS</u></b>							
Excellent	74.0	69.6	68.6	70.9	64.4	3.4	-9.2
Good	21.3	25.9	29.5	27.4	33.6	-7.1	22.6
Average	3.4	3.7	1.6	1.5	2.0	-6.3	33.3
Poor	0.2	0.4	0.2	0.0	0.0	-100.0	0.0
Unknown / n.a.	1.3	0.4	0.2	0.1	0.0	-50.0	-100.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>LOCAL TRANSPORTATION</u></b>							
Excellent	49.2	43.1	46.6	51.8	41.4	11.2	-20.1
Good	36.8	37.3	44.1	41.7	50.9	-5.4	22.1
Average	2.6	2.3	0.9	0.5	0.7	-44.4	40.0
Poor	0.2	0.0	0.1	0.0	0.0	-100.0	0.0
Unknown / n.a.	17.5	17.3	8.2	6.0	6.9	-26.8	15.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>SHOPPING</u></b>							
Excellent	54.3	45.0	44.4	51.2	35.9	15.3	-29.9
Good	32.0	41.4	46.0	43.7	56.3	-5.0	28.8
Average	4.0	3.6	1.8	1.1	2.7	-38.9	145.5
Poor	0.2	0.1	0.1	0.0	0.1	-100.0	0.0
Unknown / n.a.	9.5	10.0	7.8	3.9	5.0	-50.0	28.2
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>ENTERTAINMENT / RECREATION</u></b>							
Excellent	52.8	49.9	46.5	48.6	37.3	4.5	-23.3
Good	23.9	30.7	43.6	46.6	56.5	6.9	21.2
Average	2.7	2.3	1.0	0.7	0.8	-30.0	14.3
Poor	0.2	0.2	0.2	0.0	0.0	-100.0	0.0
Unknown / n.a.	20.3	16.9	8.8	4.1	5.4	-53.4	31.7
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>QUALITY OF SERVICE</u></b>							
Excellent	78.6	74.7	71.7	68.8	61.9	-4.0	-10.0
Good	18.1	21.2	26.1	30.4	36.9	16.5	21.4
Average	2.3	2.8	1.6	0.7	1.0	-56.3	42.9
Poor	0.3	0.4	0.1	0.0	0.0	-100.0	0.0
Unknown / n.a.	0.8	0.9	0.4	0.1	0.2	-75.0	100.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3.3 RATING FROM 1 TO 10 OF OVERALL VISIT TO ARUBA:

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
5 -	0.2	0.3	0.0	0.0	0.0	0.0	0.0
6 -	0.6	0.7	0.7	0.2	0.3	-71.4	50.0
7 -	5.8	3.9	3.9	2.0	2.6	-48.7	30.0
8 -	28.6	26.2	17.1	13.3	19.4	-22.2	45.9
9 -	36.3	38.3	43.3	51.0	50.7	17.8	-0.6
10 -	28.1	30.4	34.4	33.2	27.0	-3.5	-18.7
<b>Mean</b>	<b>8.85</b>	<b>8.92</b>	<b>9.06</b>	<b>9.14</b>	<b>9.01</b>	<b>0.9</b>	<b>-1.4</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3.4 PLACES VISITED BY THE VISITORS WHILE IN ARUBA IN 2010 (ln %)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Visit museum	n.a.	n.a.	3.3	3.3	9.1	0.0	175.8
Visit Historical buildings	n.a.	n.a.	14.8	17.9	22.5	20.9	25.7
Visit Historical sites	n.a.	n.a.	18.8	38.7	39.5	105.9	2.1
Visit Art galleries	n.a.	n.a.	1.5	1.5	3.7	0.0	146.7
Took cultural tours	n.a.	n.a.	2.2	1.5	2.6	-31.8	73.3
Attended festival or concert	n.a.	n.a.	11.3	14.3	22.7	26.5	58.7
Visit beaches	n.a.	n.a.	95.1	95.7	96.5	0.6	0.8
Visit center of Oranjestad	n.a.	n.a.	91.4	91.7	85.5	0.3	-6.8
Visit Franse Pas	n.a.	n.a.	9.4	5.1	17.7	-45.7	247.1
Visit Restaurants outside the hotel	n.a.	n.a.	67.9	60.1	59.0	-11.5	-1.8
Saw Hotels shows	n.a.	n.a.	13.1	19.0	23.5	45.0	23.7
Made Island tour	n.a.	n.a.	46.6	61.8	62.6	32.6	1.3
Visit National park	n.a.	n.a.	38.4	36.1	37.2	-6.0	3.0
Visit North Coast	n.a.	n.a.	47.2	58.3	61.1	23.5	4.8
Architecture	n.a.	n.a.	10.0	9.1	37.0	-9.0	306.6
Visit rock formation	n.a.	n.a.	36.3	44.5	46.3	22.6	4.0
Visit San Nicolas	n.a.	n.a.	40.4	55.5	62.4	37.4	12.4
Visit shopping malls	n.a.	n.a.	86.6	92.9	89.7	7.3	-3.4
Other	n.a.	n.a.	9.1	10.6	10.6	16.5	0.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3.5 RATING OF VALUE FOR MONEY OF THE FOLLOWING:

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b><u>ACCOMMODATION</u></b>							
Excellent	40.6	34.6	28.7	19.9	40.3	-30.7	102.5
Good	43.5	46.9	67.5	77.6	57.4	15.0	-26.0
Average	5.7	6.9	2.9	2.4	2.1	-17.2	-12.5
Poor	0.3	0.4	1.0	0.1	0.2	-90.0	100.0
Unknown / n.a.	9.9	11.2	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>			
<b><u>MEALS &amp; DRINKS</u></b>							
Excellent	27.7	21.4	14.1	15.5	20.3	9.9	31.0
Good	51.9	58.9	59.1	78.4	72.7	32.7	-7.3
Average	16.7	15.7	4.1	5.7	6.7	39.0	17.5
Poor	0.6	0.6	0.5	0.5	0.3	0.0	-40.0
Unknown / n.a.	3.1	3.4	22.5	0.0	0.0	-100.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>LOCAL TRANSPORTATION</u></b>							
Excellent	28.6	23.3	14.8	23.4	22.2	58.1	-5.1
Good	48.4	53.1	43.6	73.8	75.0	69.3	1.6
Average	4.5	4.5	1.6	2.4	2.7	50.0	12.5
Poor	0.2	0.2	0.1	0.3	0.1	200.0	-66.7
Unknown / n.a.	18.3	18.9	40.0	0.0	0.0	-100.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>SHOPPING</u></b>							
Excellent	25.7	26.8	16.0	25.2	15.9	57.5	-36.9
Good	50.2	51.5	56.9	71.2	77.1	25.1	8.3
Average	13.1	9.5	3.4	3.3	6.6	-2.9	100.0
Poor	0.5	0.4	0.1	0.2	0.3	100.0	50.0
Unknown / n.a.	10.6	11.8	23.9	0.0	0.0	-100.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>		
<b><u>ENTERTAINMENT / RECREATION</u></b>							
Excellent	14.0	11.3	17.4	26.0	17.3	49.4	-33.5
Good	41.8	46.5	46.8	71.9	79.1	53.6	10.0
Average	5.2	7.5	2.7	2.0	3.5	-25.9	75.0
Poor	0.3	0.2	0.2	0.1	0.2	-50.0	100.0
Unknown / n.a.	38.8	34.0	33.0	0.0	0.0	-100.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>			
<b><u>QUALITY OF SERVICE</u></b>							
Excellent	43.8	38.2	42.3	36.4	37.2	-13.9	2.2
Good	49.6	53.0	52.1	61.9	60.7	18.8	-1.9
Average	3.0	3.6	2.6	1.7	2.0	-34.6	17.6
Poor	0.3	0.3	0.0	0.1	0.1	0.0	0.0
Unknown / n.a.	3.4	5.0	2.9	0.0	0.0	-100.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>			

Source: Tourist Survey - Central Bureau of Statistics - Aruba



## 4.0. MONEY ASPECTS OF THE VISITORS

### 4.1 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY <sup>1)</sup> (In US\$)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Accommodation <sup>2)</sup>	17.83	20.98	17.03	9.88	10.39	-42.0	5.2
Food & beverage	26.41	26.43	25.10	21.13	19.49	-15.8	-7.8
Groceries / sundries	4.20	4.59	4.45	3.38	3.19	-24.0	-5.6
Entertainment / recreation	6.09	10.15	7.65	8.51	8.01	11.2	-5.9
Taxis	3.19	3.28	3.40	4.24	3.20	24.7	-24.6
Car rental	5.76	5.98	5.85	5.16	5.27	-11.8	2.2
Public transportation	0.23	0.26	0.21	0.22	0.20	4.8	-10.0
Tax free shopping	2.55	2.20	2.12	2.35	2.54	10.8	8.2
Shopping	20.80	21.76	19.02	20.22	20.83	6.3	3.0
Casinos	8.53	8.37	9.54	12.88	12.52	35.0	-2.8
Internet/Telephone	1.11	0.18	0.26	0.18	0.16	-30.8	-12.2
Other <sup>3)</sup>	1.39	1.74	0.67	0.50	0.45	-25.4	-11.0
<b>Avg. Daily Expenditure in Aruba (In US\$)</b>	<b>96.70</b>	<b>102.74</b>	<b>94.24</b>	<b>86.86</b>	<b>84.64</b>	<b>-7.8</b>	<b>-2.6</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Notes : ( Note 1 apply to all expenditures mentioned in the tables regarding expenditures)

1) The expenditures above mentioned are expenditures that were made while the visitors were IN ARUBA, excluding anything spent on pre-paid package outside of Aruba.

2) The expenditure category "accommodation" does not include any expenses made on a pre-paid package for accommodation.

3) The expenditures belonging to the category "other" also includes expenditures which are unknown or that that could not be specified by the interviewed visitors. For this reason the amount does not represent expenditures belonging to the category "other" only.

### 4.2 AVERAGE DAILY EXPENDITURE BY PLACE OF RESIDENCE <sup>1)</sup> (In US\$)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
United States	98.72	99.84	93.83	86.27	82.34	-8.1	-4.6
Venezuela	145.57	160.50	145.67	141.27	131.87	-3.0	-6.7
Netherlands	52.34	61.24	53.18	44.93	55.43	-15.5	23.4
Brazil	117.84	126.22	83.97	88.68	87.69	5.6	-1.1
Netherlands Antilles	95.70	90.44	78.00	68.75	86.22	-11.9	25.4
Canada	65.50	60.12	52.36	54.97	51.09	5.0	-7.1
Colombia	87.69	119.77	89.06	74.80	75.35	-16.0	0.7
Other	60.36	69.56	71.08	70.17	62.81	-1.3	-10.5
<b>Total visitors</b>	<b>96.70</b>	<b>102.74</b>	<b>94.24</b>	<b>86.86</b>	<b>84.64</b>	<b>-7.8</b>	<b>-2.6</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 4.3 AVERAGE DAILY EXPENDITURE BY PURPOSE OF VISIT (In US\$) <sup>1)</sup>

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Vacation	96.01	103.12	94.96	86.36	84.80	-9.1	-1.8
Honeymoon	93.03	95.51	82.25	87.61	76.25	6.5	-13.0
Visit friends / relatives	61.66	63.75	45.46	52.85	58.72	16.3	11.1
Other	143.18	112.93	138.86	70.77	79.40	-49.0	12.2
Business & leisure	190.54	177.03	230.27	172.86	199.48	-24.9	15.4
Business Only / Convention <sup>2)</sup>	251.20	203.51	202.66	131.38	190.50	-35.2	45.0
Wedding	93.33	82.41	52.81	53.93	68.01	2.1	26.1

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) Expenditures belonging to the categories Incentives and Golf are based on a very small sample and therefore has been left out.

2) The expenditure belonging to the category "Other" and "Business Only / Convention" are based on a small sample and therefore may not be very representative.

### 4.4 AVERAGE DAILY EXPENDITURE BY NUMBER OF VISITS TO ARUBA <sup>1)</sup> (In US\$)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
First time	85.82	89.19	77.92	77.96	71.93	0.1	-7.7
Between 2 and 5 times	98.88	103.19	99.49	89.93	94.70	-9.6	5.3
6 Times or more	105.50	116.57	112.70	98.22	96.46	-12.8	-1.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 4.5 AVERAGE DAILY EXPENDITURE BY YEARLY HOUSEHOLD INCOME LEVEL <sup>1)</sup> (In US\$)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Less than US\$20,000	73.50	71.50	57.33	61.04	62.73	6.5	2.8
US\$20,001 - US\$30,000	109.03	118.44	89.78	72.64	77.98	-19.1	7.4
US\$30,001 - US\$50,000	85.1	87.17	90.83	69.19	78.12	-23.8	12.9
US\$50,001 - US\$75,000	89.83	90.45	91.10	78.72	82.81	-13.6	5.2
US\$75,001 - US\$100,000	101.51	115.28	103.49	92.54	93.85	-10.6	1.4
US\$100,001 and over	128.55	134.06	118.41	122.48	111.07	3.4	-9.3

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.6 HOW MANY PERSONS DOES THE EXPENDITURE COVERS

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Adults	9,430	9,501	9,165	9,102	9,076	-0.7	-0.3
Children	955	942	750	762	714	1.6	-6.3
<b>Total</b>	<b>10,385</b>	<b>10,443</b>	<b>9,915</b>	<b>9,864</b>	<b>9,790</b>	<b>-0.5</b>	<b>-0.8</b>

Source: Central Bureau of Statistics - Aruba

#### 4.7 HOTEL RELATED STATISTICS

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<i>Hotel :</i>							
Occupancy	73.2%	72.0%	73.5%	74.5%	78.7%	1.4	5.6
Average Daily Rate	\$187.79	\$179.21	\$180.75	\$193.37	\$200.54	7.0	3.7
Revenue per available room	\$137.46	\$129.04	\$132.77	\$143.42	\$157.83	8.0	10.0
<i>Timeshare :</i>							
Occupancy	80.3%	77.3%	80.6%	82.0%	79.4%	1.7	-3.2
Average Daily Rate	\$146.25	\$147.00	\$170.14	\$179.94	\$157.46	5.8	-12.5
Revenue per available room	\$17.50	\$16.71	\$19.02	\$19.07	\$19.57	0.3	2.6
<i>Total :</i>							
Occupied Room Nights	2,069,844	2,023,885	2,043,945	2,039,162	2,088,247	-0.2	2.4
Occupancy	76.6%	74.7%	76.8%	77.7%	79.0%	1.2	1.7
Average Daily Rate	\$182.50	\$175.00	\$179.53	\$192.00	\$195.07	6.9	1.6
Revenue per available room	\$80.91	\$74.46	\$80.27	\$88.18	\$91.57	9.9	3.8
Total Room Revenue	218,723,230	201,612,845	213,510,993	231,545,203	241,938,862	8.4	4.5

Source: Central Bureau of Statistics - Aruba

#### 4.8 AVERAGE EXPENDITURE PER PERSON PER TRIP BY THE MAJOR MARKETS <sup>1)</sup> ( In US\$ )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
United States	770.02	757.79	707.48	647.03	620.02	-8.5	-4.2
Venezuela	902.53	906.83	852.17	819.37	774.08	-3.8	-5.5
Netherlands	690.89	780.81	662.09	512.20	614.72	-22.6	20.0
Brazil	765.96	778.78	556.72	620.76	619.09	11.5	-0.3
Netherlands Antilles	497.64	456.72	382.20	343.75	412.99	-10.1	20.1
Canada	550.20	479.76	401.60	423.27	380.11	5.4	-10.2
Colombia	719.06	934.21	797.98	553.52	602.05	-30.6	8.8
Other	688.10	727.60	692.32	589.43	586.65	-14.9	-0.5
<b>Total visitors</b>	<b>783.27</b>	<b>793.15</b>	<b>723.76</b>	<b>651.45</b>	<b>638.19</b>	<b>-10.0</b>	<b>-2.0</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.9 TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS <sup>1)</sup> ( In 1,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
United States	415,834.05	400,279.78	379,033.57	343,654.39	329,199.73	-9.3	-4.2
Venezuela	101,973.71	95,273.75	77,299.44	96,552.45	110,848.59	24.9	14.8
Netherlands	28,930.24	32,177.96	26,678.29	20,522.91	24,572.15	-23.1	19.7
Brazil	6,698.32	8,250.37	11,265.25	13,913.09	13,044.26	23.5	-6.2
Netherlands Antilles	10,944.10	9,835.96	8,929.34	8,859.47	11,299.92	-0.8	27.5
Canada	17,898.01	16,242.67	15,117.47	17,136.89	17,442.09	13.4	1.8
Colombia	9,663.42	14,653.02	11,972.86	9,245.44	10,913.30	-22.8	18.0
Other	37,899.39	41,076.52	42,459.24	43,948.34	45,385.82	3.5	3.3
<b>Total visitors</b>	<b>647,511.29</b>	<b>644,534.21</b>	<b>596,619.72</b>	<b>566,092.46</b>	<b>576,877.66</b>	<b>-5.1</b>	<b>1.9</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.10 TOURISM EXPENDITURE IN ARUBA BY YEARLY HOUSEHOLD INCOME LEVEL OF THE VISITORS <sup>1)</sup> ( In 1,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Less than US\$50,000	167,469.55	170,803.46	149,751.55	175,961.83	209,406.59	17.50	19.0
More than US\$50,000	403,744.42	354,497.74	354,988.73	299,702.73	264,209.97	-15.57	-11.8
Unknown	77,892.81	119,240.15	91,879.44	91,954.25	103,261.10	0.08	12.3
<b>Total</b>	<b>649,106.78</b>	<b>644,541.35</b>	<b>596,619.72</b>	<b>567,618.81</b>	<b>576,877.66</b>	<b>-4.86</b>	<b>1.6</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.11 LODGING TAX ( In 1,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Quarter 1	6,697,200	5,960,950	6,359,218	10,139,106	10,840,223	59.4	6.9
Quarter 2	5,149,924	3,310,592	5,522,346	8,903,911	8,717,877	61.2	-2.1
Quarter 3	4,573,267	2,748,603	5,353,631	7,295,531	7,538,547	36.3	3.3
Quarter 4	3,733,046	3,065,922	6,117,877	6,425,698	6,906,704	5.0	7.5
<b>Total</b>	<b>20,153,438</b>	<b>15,086,067</b>	<b>23,353,073</b>	<b>32,764,246</b>	<b>34,003,352</b>	<b>40.3</b>	<b>3.8</b>

Source: Tax collector's office

#### 4.12 CASINO TAX ( In 1,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Quarter 1	4,555,196	5,965,106	6,359,218	3,841,341	4,289,385	-39.6	11.7
Quarter 2	3,533,166	4,789,268	3,160,894	3,053,631	3,240,782	-3.4	6.1
Quarter 3	2,917,397	4,391,620	2,416,201	2,658,101	1,569,274	10.0	-41.0
Quarter 4	2,935,047	3,705,028	2,692,737	2,810,056	2,124,022	4.4	-24.4
<b>Total</b>	<b>13,940,806</b>	<b>18,851,022</b>	<b>14,629,050</b>	<b>12,363,129</b>	<b>11,223,464</b>	<b>-15.5</b>	<b>-9.2</b>

Source: Tax collector's office

#### 4.13 TOURISM RECEIPTS ( In 1,000,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Quarter 1	418.60	347.77	360.84	386.87	407.60	7.2	5.4
Quarter 2	326.65	270.17	289.39	326.70	325.08	12.9	-0.5
Quarter 3	319.44	283.85	279.55	311.90	323.46	11.6	3.7
Quarter 4	345.70	314.19	315.03	326.59	343.30	3.7	5.1
<b>Total</b>	<b>1,410.39</b>	<b>1,215.98</b>	<b>1,244.80</b>	<b>1,352.07</b>	<b>1,399.44</b>	<b>8.6</b>	<b>3.5</b>

Source: Central Bank of Aruba

#### 4.14 ESTIMATED TOTAL TOURISM EXPENDITURE <sup>1)</sup> ( In 1,000 US dollars )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
Quarter 1	252,558.33	213,484.63	237,830.01	209,220.34	236,710.22	-12.0	13.1
Quarter 2	175,855.86	164,580.84	183,816.37	213,109.22	194,669.25	15.9	-8.7
Quarter 3	170,335.95	189,556.32	207,892.81	203,560.23	206,954.82	-2.1	1.7
Quarter 4	182,906.87	199,227.63	191,143.81	208,309.25	216,281.82	9.0	3.8
<b>Total</b>	<b>781,657.01</b>	<b>766,849.42</b>	<b>820,683.00</b>	<b>834,199.04</b>	<b>854,616.11</b>	<b>1.6</b>	<b>2.4</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

<sup>1)</sup> For further explanation on estimated total tourism expenditure refer to methodology which is available upon request at the CBS

#### 4.15 MARKETING EXPENSES OF THE ARUBA TOURISM AUTHORITY (A.T.A.) (In US dollars)

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
North America	9,022,295	17,415,803	n.a.	n.a.	n.a.	n.a.	n.a.
Latin America	1,780,259	2,089,968	n.a.	n.a.	n.a.	n.a.	n.a.
Europe	1,898,449	3,581,129	n.a.	n.a.	n.a.	n.a.	n.a.
Carib/RZA	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Aruba	1,928,875	2,131,054	n.a.	n.a.	n.a.	n.a.	n.a.
<b>Total</b>	<b>14,629,877</b>	<b>25,217,954</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>

Source: Aruba Tourism Authority (ATA)

## 5.0. MARKET SHARES IN THE CARIBBEAN

### 5.1 TOURIST ARRIVALS IN THE CARIBBEAN BY DESTINATION ( In thousands )

	Year 2008	% share	Year 2009	% share	Year 2010	% share	Year 2011	% share	Year 2012	% share
<b>Caribbean</b>	<b>19,433.8</b>	<b>100.0</b>	<b>18,626.3</b>	<b>100.0</b>	<b>19,522.9</b>	<b>100.0</b>	<b>19,504.3</b>	<b>100.0</b>	<b>20,045.4</b>	<b>100.0</b>
Anguila	68.3	0.4	57.9	0.3	62.0	0.3	65.8	0.3	64.7	0.3
Antigua / Barbuda	265.8	1.4	234.4	1.3	229.9	1.2	241.3	1.2	246.9	1.2
<b>Aruba</b>	<b>826.8</b>	<b>4.3</b>	<b>812.6</b>	<b>4.4</b>	<b>824.3</b>	<b>4.2</b>	<b>869.0</b>	<b>4.5</b>	<b>903.9</b>	<b>4.5</b>
Bahamas	1462.4	7.5	1327.0	7.1	1,370.1	7.0	1,346.4	6.9	1,419.3	7.1
Barbados	567.7	2.9	518.6	2.8	532.2	2.7	567.7	2.9	536.3	2.7
Belize	245.0	1.3	232.2	1.2	241.9	1.2	250.3	1.3	277.1	1.4
Bermuda	263.6	1.4	235.9	1.3	232.3	1.2	236.0	1.2	232.1	1.2
Bonaire	74.3	0.4	67.0	0.4	70.5	0.4	n.a.	n.a.	n.a.	n.a.
Br. Virgin Island	345.9	1.8	308.8	1.7	330.3	1.7	337.8	1.7	351.4	1.8
Cayman Island	302.9	1.6	272.0	1.5	288.3	1.5	309.1	1.6	321.7	1.6
Cuba	2348.3	12.1	2,429.8	13.0	2,531.7	13.0	2,716.3	13.9	2,838.2	14.2
Curacao	408.9	2.1	367.0	2.0	341.7	1.8	390.3	2.0	232.1	1.2
Dominica	80.4	0.4	74.9	0.4	76.5	0.4	75.5	0.4	78.1	0.4
Dom. Republic	3979.7	20.5	3,992.3	21.4	4,124.5	21.1	4,306.4	22.1	4,562.6	22.8
Grenada	129.6	0.7	113.4	0.6	110.5	0.6	118.3	0.6	112.3	0.6
Guyana	132.8	0.7	141.1	0.8	151.9	0.8	156.9	0.8	176.6	0.9
Haiti	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Jamaica	1767.3	9.1	1,831.1	9.8	1,921.7	9.8	1,915.8	9.8	1,986.1	9.9
Martinique	481.2	2.5	443.2	2.4	476.5	2.4	496.5	2.5	487.4	2.4
Mexico (Cancun)	2165.3	11.1	1,891.4	10.2	2,106.5	10.8	1,940.7	9.9	1,826.1	n.a.
Mexico (Conzumel)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Monserrat	7.4	0.0	6.3	0.0	6.0	0.0	5.4	0.0	7.3	0.0
Puerto Rico	1321.5	6.8	1,300.8	7.0	1,369.2	7.0	1,448.7	7.4	1,569.7	7.8
Saba	12.0	0.1	12.0	0.1	12.3	0.1	n.a.	n.a.	n.a.	n.a.
St. Eustatius	11.8	0.1	4.0	0.0	6.7	n.a.	n.a.	n.a.	n.a.	n.a.
St. Maarten	475.4	2.4	440.2	2.4	443.1	2.3	424.3	2.2	456.7	2.3
St. Kitts / Nevis	106.4	0.5	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
St. Lucia	295.8	1.5	278.5	1.5	305.9	1.6	312.4	1.6	306.8	1.5
St. Vincent and Grenadines	84.1	0.4	75.4	0.4	72.5	0.4	73.9	0.4	74.4	0.4
Suriname	89.4	0.5	150.4	0.8	204.3	1.0	220.5	1.1	240.0	1.2
Trinidad / Tobago	430.5	2.2	342.1	1.8	388.3	2.0	n.a.	n.a.	n.a.	n.a.
Turks / Caicos	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
U.S. Virgin Islands	683.3	3.5	666.1	3.6	691.2	3.5	679.0	3.5	737.7	3.7

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

n.a. = data not available

### 5.2 CRUISE PASSENGER ARRIVALS TO THE CARIBBEAN BY DESTINATION ( In thousands )

	Year 2008	% share	Year 2009	% share	Year 2010	% share	Year 2011	% share	Year 2012	% share
<b>Caribbean</b>	<b>18,186.68</b>	<b>100.0</b>	<b>18,890.90</b>	<b>100.0</b>	<b>20,071.81</b>	<b>100.0</b>	<b>20,616.70</b>	<b>100.0</b>	<b>13,686.82</b>	<b>100.0</b>
Antigua / Barbuda	580.85	3.2	712.79	3.8	557.64	2.8	606.49	2.9	383.63	2.8
<b>Aruba</b>	<b>556.10</b>	<b>3.1</b>	<b>606.77</b>	<b>3.2</b>	<b>569.43</b>	<b>2.8</b>	<b>599.89</b>	<b>2.9</b>	<b>373.36</b>	<b>2.7</b>
Bahamas	2,861.14	15.7	3,255.78	17.2	3,809.81	19.0	4,161.27	20.2	2,668.91	19.5
Barbados	597.52	3.3	635.21	3.4	664.75	3.3	619.05	3.0	344.92	2.5
Belize	597.37	3.3	705.22	3.7	764.63	3.8	724.54	3.5	431.44	3.2
Bermuda	286.40	1.6	318.53	1.7	347.93	1.7	415.96	2.0	302.38	2.2
Bonaire	175.70	1.0	213.19	1.1	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Br. Virgin Island	571.75	3.1	530.33	2.8	501.45	2.5	484.72	2.4	272.26	2.0
Cayman Island	1,553.05	8.5	1,520.37	8.0	1,597.84	8.0	1,401.50	6.8	971.26	7.1
Curacao	352.90	1.9	423.09	2.2	383.04	1.9	400.92	1.9	292.58	2.1
Dominica	386.41	2.1	532.35	2.8	517.98	2.6	341.50	1.7	191.76	1.4
Dom. Republic	348.92	1.9	496.73	2.6	352.54	1.8	347.91	1.7	251.18	1.8
Grenada	292.70	1.6	342.85	1.8	333.29	1.7	309.57	1.5	170.39	1.2
Guadeloupe	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Haiti	n.a.	n.a.	439.06	2.3	330.64	1.6	596.56	2.9	431.49	3.2
Jamaica	1,088.90	6.0	922.35	4.9	909.62	4.5	1,125.48	5.5	850.00	6.2
Martinique	87.08	0.5	69.75	0.4	74.64	0.4	41.14	0.2	66.33	0.5
Mexico (Conzumel)	2,569.43	14.1	2,221.73	11.8	2,911.15	14.5	2,871.10	13.9	1,880.88	13.7
Puerto Rico	1,392.62	7.7	1,179.02	6.2	1,191.06	5.9	1,124.44	5.5	703.92	5.1
St. Kitts/Nevis	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
St. Lucia	619.68	3.4	699.31	3.7	670.04	3.3	630.30	3.1	383.52	2.8
St. Maarten	1,345.81	7.4	1,215.15	6.4	1,512.62	7.5	1,656.16	8.0	1071.49	7.8
St. Vincent and Grenadines	116.61	0.6	149.46	0.8	110.96	0.6	88.93	0.4	49.25	0.4
Trinidad / Tobago	48.67	0.3	119.60	0.6	101.80	0.5	60.28	0.3	290.36	2.1
U.S. Virgin Islands	1,757.07	9.7	1,582.26	8.4	1,858.95	9.3	2,008.99	9.7	1,305.51	9.5

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

n.a. = data not available

### 5.3 TOURIST ARRIVALS FROM THE UNITED STATES ( In thousands )

	Year 2008	Year 2009	Year 2010	Year 2011	Year 2012	% change 11/10	% change 12/11
<b>TOTAL Caribbean</b>	<b>8,847.7</b>	<b>8,602.5</b>	<b>9,049.2</b>	<b>8,873.7</b>	<b>7,237.7</b>	-1.9	-18.4
Anguilla	40.2	34.1	38.9	42.8	41.8	10.2	-2.4
Antigua and Barbuda	84.0	82.1	81.5	84.8	93.2	4.1	9.9
Dominica	20.5	18.2	19.3	17.8	19.0	-7.5	6.5
Grenada	21.5	21.1	20.0	35.9	25.2	79.1	-29.8
Montserrat	1.9	1.6	1.1	1.5	2.0	34.6	28.0
St. Lucia	108.6	98.7	129.1	122.4	115.1	-5.2	-6.0
St. Vincent and Grenadines	24.0	20.2	21.6	21.2	21.5	-1.8	1.4
Bahamas	1176.7	1068.7	1095.3	1054.7	1,119.3	-3.7	6.1
Barbados	131.0	122.3	135.0	142.4	130.8	5.5	-8.2
Belize	147.7	139.6	145.1	156.3	176.6	7.7	13.0
Bermuda	207.8	172.7	166.0	172.9	168.2	4.1	-2.7
Cayman Islands	240.5	215.0	228.5	242.9	253.2	6.3	4.2
Guyana	67.9	76.2	82.2	83.3	96.8	1.3	16.3
Jamaica	1150.9	1172.8	1242.9	1225.6	1257.7	-1.4	2.6
<b>Aruba</b>	<b>539.5</b>	<b>528.2</b>	<b>535.8</b>	<b>531.1</b>	<b>531.0</b>	-0.9	0.0
Curacao	35.0	36.0	48.7	62.4	61.5	28.2	-1.4
St. Maarten	218.1	240.4	236.4	219.2	238.5	-7.3	8.8
Puerto Rico	1184.0	1173.2	1231.7	1302.7	1421.9	5.8	9.2
US Virgin Islands	672.9	724.9	696.9	616.2	n.a.	-11.6	n.a.
Cancun (Mexico)	1679.8	1503.2	1661.8	1443.7	n.a.	-13.1	n.a.
Dominican Republic	1092.2	1148.5	1226.4	1286.2	1,456.6	4.9	13.3
Suriname	3.0	5.0	5.1	7.8	8.0	51.3	2.9

Source: Caribbean Tourism Organization - C.T.O. (CTO Statistical Report)

n.a. = data not available

## Tables of Quarterly Results for 2011 & 2012

### 2. TOURISM IN ARUBA

#### 2.1 NUMBER OF STAYOVER VISITORS BY PLACE OF RESIDENCE

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
<b>Total Visitors</b>	<b>220,095</b>	<b>212,490</b>	<b>223,767</b>	<b>212,621</b>	<b>224,650</b>	<b>216,691</b>	<b>233,681</b>	<b>228,912</b>
United States	145,572	139,313	123,708	122,537	144,409	137,579	125,310	123,652
Venezuela	17,497	24,199	41,975	34,167	22,713	28,332	47,776	44,380
Netherlands	9,896	9,403	10,527	10,242	10,405	9,264	10,659	9,645
Netherlands Antilles	4,621	6,177	8,087	6,888	5,162	7,747	7,206	7,246
Colombia	3,098	5,048	3,820	4,737	3,379	4,520	4,259	5,969
Brazil	5,800	4,265	6,388	5,960	5,415	4,124	6,014	5,517
Canada	18,101	6,994	5,103	10,289	17,500	7,783	7,505	13,099
Argentina	2,543	1,788	3,263	2,732	3,426	2,751	3,783	2,905
Germany	660	895	935	1,003	980	923	1,117	1,034
Rest of Europe	5,267	2,565	2,817	5,192	5,319	2,345	2,943	6,066
So - Cent. America	968	1,611	1,123	1,371	999	1,215	1,463	1,710
United Kingdom	639	4,391	6,949	1,891	534	4,447	6,917	1,814
Surinam	650	1,037	1,522	1,011	771	1,470	1,565	1,311
Rest of the World	4,783	4,804	7,550	4,601	3,638	4,191	7,164	4,564

Source: Aruba Tourism Authority (ATA)

#### 2.2 CRUISE PASSENGERS

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Number of passengers	297,923	79,934	15,102	207,014	273,779	86,422	31,195	190,917
Number of calls	160	50	14	108	137	39	16	102
Number of crew members	124,062	34,604	6,940	84,146	109,069	33,727	11,426	79,105
Avg. no. of passengers/ship	1,862	1,599	1,079	1,917	1,998	2,216	1,950	1,872

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

#### 2.3 TOTAL NUMBER OF VISITORS

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Total stayover visitors	220,095	212,490	223,767	212,621	224,650	216,691	233,681	228,912
Total cruise visitors	297,923	79,934	15,102	207,014	273,779	86,422	31,195	190,917
<b>Total number of visitors</b>	<b>518,018</b>	<b>292,424</b>	<b>238,869</b>	<b>419,635</b>	<b>498,429</b>	<b>303,113</b>	<b>264,876</b>	<b>419,829</b>

Source: Aruba Tourism Authority (ATA) & Cruise Tourism Authority N.V. - Aruba

#### 2.4 AVERAGE LENGTH OF STAY BY PLACE OF RESIDENCE OF VISITORS TO ARUBA ( In days )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
United States	7.5	7.4	7.6	7.5	7.8	7.6	7.3	7.4
Venezuela	5.9	5.6	6.1	5.6	6.0	5.7	6.3	5.4
Netherlands	9.8	13.3	11.8	10.8	11.0	11.1	11.8	10.5
Brazil	6.4	8.2	6.6	6.9	7.3	6.8	7.2	6.8
Netherlands Antilles	5.5	4.7	5.6	4.3	5.2	4.5	5.0	4.6
Canada	7.9	7.2	7.7	7.7	7.7	7.3	7.6	7.0
Colombia	7.0	7.9	6.3	8.2	8.3	7.5	9.2	7.4
Other	9.7	9.4	8.6	8.0	10.1	8.5	9.1	9.9
<b>Avg. length of stay</b>	<b>7.6</b>	<b>7.6</b>	<b>7.5</b>	<b>7.3</b>	<b>7.9</b>	<b>7.5</b>	<b>7.5</b>	<b>7.3</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

## 2.5 NUMBER OF VISITOR NIGHTS BY PLACE OF RESIDENCE ( \* 1,000 )

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
<b>Total Visitors</b>	<b>1,777.46</b>	<b>1,532.32</b>	<b>1,712.29</b>	<b>1,657.76</b>	<b>1,802.60</b>	<b>1,552.36</b>	<b>1,804.37</b>	<b>1,747.81</b>
United States	1148.76	959.50	888.70	923.17	1128.21	956.91	905.06	925.15
Venezuela	111.29	148.20	295.95	217.43	147.06	154.78	334.86	266.85
Netherlands	120.35	107.36	125.32	119.17	123.90	109.67	132.23	117.09
Netherlands Antilles	20.91	28.96	41.94	33.48	24.43	37.50	40.50	37.23
Colombia	31.31	43.46	36.44	58.26	32.72	41.80	36.83	61.30
Brazil	35.75	25.99	40.54	39.28	33.33	25.90	38.71	35.62
Canada	157.81	54.19	41.66	91.91	153.72	60.43	63.24	112.90
Argentina	22.68	14.75	27.71	21.67	28.94	23.59	34.20	25.26
Germany	6.58	9.34	10.34	11.57	9.33	9.40	12.39	10.36
Rest of Europe	60.08	25.35	28.72	56.22	62.27	22.83	29.36	68.21
So - Cent. America	5.28	10.08	7.88	9.18	6.28	7.95	9.83	11.76
United Kingdom	5.54	50.99	84.74	21.54	5.28	52.22	84.32	19.75
Surinam	5.95	8.52	13.12	8.60	6.36	9.91	13.56	9.73
Rest of the World	45.18	45.64	69.23	46.28	40.79	39.47	69.30	46.59

Source: Aruba Tourism Authority (ATA)

## 2.6 AIRPORT TRAFFIC / NUMBER OF PASSENGERS TRAVELING BY AIR

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
Arrived	243,994	236,930	258,665	240,955	#	251,771	244,272	265,218
Foreign Arrivals	224,028	213,087	230,363	217,648		231,655	220,662	235,681
Local Arrivals	19,966	23,843	28,302	23,307		20,116	23,610	29,537
Departed	251,768	242,967	267,285	230,481		259,460	249,600	276,063
In transit	30,983	29,735	33,854	21,404		16,463	15,060	16,325
<b>Total Traffic</b>	<b>526,745</b>	<b>509,632</b>	<b>559,804</b>	<b>492,840</b>		<b>527,694</b>	<b>508,932</b>	<b>557,606</b>

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

## 2.7 AIRCRAFT LANDINGS

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
Commercial landings	3,788	3,841	3,767	3,336	3,774	3,698	3,802	3,797
Non-commercial landings	1,114	934	1,221	1,224	1,253	1,267	1,481	1,471
<b>Total</b>	<b>4,902</b>	<b>4,775</b>	<b>4,988</b>	<b>4,560</b>	<b>5,027</b>	<b>4,965</b>	<b>5,283</b>	<b>5,268</b>

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

## 2.8 STAYOVER VISITORS BY CARRIER

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
American Airlines	30,441	26,866	26,150	22,730	20,898	23,999	22,316	19,317
Avianca	5,586	6,719	7,540	7,200	5,072	5,939	7,584	7,940
KLM	1,954	1,703	2,739	5,244	6,626	5,893	7,191	6,508
Private	1,580	1,603	2,705	2,937	2,964	2,758	3,242	3,826
Suriname Airways	1,246	1,360	1,851	1,649	1,104	1,321	1,510	1,368
Aserca	2,835	4,055	5,643	4,062	3,480	5,314	7,885	7,495
Charter	11,798	8,961	10,436	12,101	11,412	7,635	12,864	11,344
Continental	25,511	24,288	22,193	20,881	17,965	0	0	0
Delta Airline	17,831	19,623	16,321	16,510	17,243	16,376	15,369	18,131
Us Airways	28,131	24,168	19,914	22,055	25,681	25,401	20,156	20,336
United Airlines	9,075	6,317	3,096	3,588	17,154	28,691	25,576	23,398
Avior	990	1,159	2,324	2,077	779	1,519	1,683	1,907
Varig	0	0	0	0	0	0	136	0
Arkeflight	3,265	4,309	4,171	4,463	4,500	3,894	3,875	3,919
Dutch Antilles Express	340	602	537	438	119	262	180	272
Dutch Caribbean Express	3,623	3,489	4,282	2,603	3,249	4,643	6,551	5,268
Insel Air	5,664	7,621	10,844	11,131	7,868	9,671	11,071	10,267
Jet Blue	30,688	29,239	33,047	33,008	36,197	30,697	33,293	32,932
Martin Air	5,420	2,567	4,218	1,708	0	0	0	0
Tiara Air	5,526	6,014	11,507	6,382	6,521	7,687	11,205	13,356
Copa Airline	2,845	3,524	3,576	4,125	4,801	4,988	6,688	6,279
Spirit Airlines	1,268	1,537	1,679	1,527	977	1,290	1,301	1,357
Venezolana Airlines	5,045	6,704	14,791	9,005	3,689	4,528	8,194	7,114
Gol Transportes Aereos	3,079	3,536	4,064	3,999	3,171	3,329	3,763	2,996
Air Canada	2,786	1,299	1,300	1,587	2,697	1,360	1,406	1,772
Air Tran Airways	7,193	8,262	5,776	7,042	13,585	13,094	11,864	13,026
Other	3,897	6,073	3,059	5,100	6,872	6,401	8,770	8,779
<b>Total</b>	<b>218,123</b>	<b>212,805</b>	<b>223,763</b>	<b>213,693</b>	<b>224,650</b>	<b>216,691</b>	<b>233,681</b>	<b>228,912</b>

Source: Aruba Airport Authority N.V. (AAA) & Department of Immigration - International Airport of Aruba

### 3. VISITOR'S PROFILE

#### 3.1. CHARACTERISTICS OF THE VISITORS

##### 3.1.1 AGE GROUPS OF THE VISITORS ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Under 20 yrs	0.6	0.9	1.3	0.4	0.5	2.4	3.6	2.4
20 - 29 yrs	5.5	6.9	6.4	6.1	6.6	10.8	9.1	6.9
30 - 39 yrs	19.4	23.4	23.1	27.1	23.7	25.3	26.3	25.4
40 - 49 yrs	28.7	25.2	26.2	26.6	27.7	25.9	30.7	34.7
50 - 64 yrs	35.5	26.9	29.8	29.1	29.0	24.3	22.8	21.5
Over 65 yrs	10.2	16.7	13.2	10.6	12.4	11.2	7.5	9.1
Unknown	0.1	0.0	0.0	0.1	0.1	0.1	0	0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.2 YEARLY HOUSEHOLD INCOME OF THE VISITORS ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Less than US\$20,000	4.8	5.9	8.2	8.2	5.3	5.9	9.2	7.5
US\$20,001 - US\$30,000	4.9	8.4	11.9	6.8	6.9	7.6	12.8	8.7
US\$30,001 - US\$50,000	13.9	14.9	17.1	18.5	20.4	20.1	21.6	19.0
US\$50,001 - US\$75,000	28.6	22.9	24.0	23.8	26.0	21.2	18.3	21.4
US\$75,001 - US\$100,000	16.9	14.3	10.0	9.4	11.0	9.2	12.8	13.4
US\$100,001 and over	15.4	15.8	13.8	15.1	14.2	14.8	9.5	11.4
	15.6	17.9	14.9	18.3	16.1	21.2	15.8	18.6
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.3 OCCUPATION OF THE VISITORS ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Legislators, senior officials and managers	15.9	13.7	12.9	15.6	13.3	11.3	11.2	13.2
Professionals	19.6	14.9	20.4	20.7	17.4	18.1	22.0	21.4
Technicians and associate professionals	7.7	6.8	5.5	6.0	7.3	6.6	6.7	6.9
Clerks	7.6	7.5	6.7	7.5	6.7	7.3	5.8	7.4
Service workers, shop & market sales workers	4.2	4.8	4.1	6.0	6.5	7.6	6.8	6.8
Not economically active (Retired)	41.1	49.4	45.9	39.8	44.1	44.2	42.4	39.8
Skilled agricultural and fishery workers	1.4	0.1	0.2	0.4	0.0	0.4	0.1	0.0
Craft and related trades workers	0.8	1.3	2.4	1.3	2.0	2.1	2.4	1.7
Plant and machine operators and assemblers	0.6	0.6	0.5	0.7	1.1	0.7	1.0	1.2
Elementary occupations	0.5	0.6	0.8	1.6	1.2	1.3	1.0	1.2
Armed forces	0.2	0.2	0.1	0.0	0.1	0.1	0.3	0.0
Unknown	0.5	0.0	0.5	0.4	0.3	0.1	0.4	0.4

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.4 METHOD VISITORS USED TO BOOK A TRIP ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
<b>In person in General</b>	<b>22.8</b>	<b>24.3</b>	<b>31.3</b>	<b>27.9</b>	<b>27.4</b>	<b>26.5</b>	<b>36.1</b>	<b>27.2</b>
<b>By telephone in General</b>	<b>14.2</b>	<b>11.7</b>	<b>14.1</b>	<b>14.4</b>	<b>9.6</b>	<b>11.4</b>	<b>9.0</b>	<b>12.7</b>
Travel Agent (In Pers/Tel.)	22.4	22.1	28.7	26.4	69.8	71.1	68.3	75.4
Tour Operator (In Pers/Tel.)	0.4	0.4	0.1	0.0	1.8	0.5	0.2	0.7
Hotel Direct (In Pers/Tel.)	2.9	3.6	5.6	1.6	12.2	11.2	10.1	8.0
Airline Direct (In Pers.Tel.)	12.1	10.1	13.4	14.6	25.9	27.2	30.2	30.2
<b>Online in General</b>	<b>59.5</b>	<b>58.9</b>	<b>52.3</b>	<b>52.4</b>	<b>54.7</b>	<b>57.3</b>	<b>51.7</b>	<b>48.0</b>
On-Line Tour Operator	31.9	31.6	24.8	23.9	45.3	42.7	48.3	52.0
On-Line Hotel Direct	5.3	3.6	3.6	3.3	6.3	6.0	8.5	4.2
On-Line Airline Direct	21.0	20.5	18.9	17.0	28.8	27.0	28.0	27.9
<b>Other</b>	<b>7.4</b>	<b>7.6</b>	<b>9.1</b>	<b>11.7</b>	<b>8.3</b>	<b>4.8</b>	<b>3.2</b>	<b>12.1</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

##### 3.1.5 VISITORS THAT HAVE BEEN TO ARUBA BY CRUISE AND VISITOR THAT HAVE BEEN TO THE CARIBBEAN PRIOR TO THIS VISIT ( In Percentages )

		Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
To Aruba by cruise	Yes	13.4	14.8	10.7	9.7	13.2	13.7	13.3	10.6
	No	86.6	85.2	89.3	90.3	86.8	86.3	86.7	89.4
Prior visit to the Caribbean	Yes	78.4	79.2	80.4	82.2	80.9	79.6	76.7	75.5
	No	21.6	20.8	19.6	17.8	19.1	20.4	23.3	24.5

Source: Tourist Survey - Central Bureau of Statistics - Aruba



## 3.2. BEHAVIOR OF THE VISITORS

### 3.2.1 NUMBER OF VISITS TO ARUBA ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
First time	47.6	49.9	42.5	47.3	49.0	44.1	45.2	47.2
2 to 5 times	20.7	18.8	24.6	26.6	22.1	25.2	24.2	27.3
6 times or more	31.6	31.3	32.9	26.1	28.9	30.6	30.6	25.5
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.2 PURPOSE OF VISIT ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Vacation	91.0	90.2	90.0	89.9	92.7	89.6	89.9	89.4
Honeymoon	2.4	2.5	2.8	2.3	2.0	3.2	2.7	2.9
Visit friends / relatives	4.0	5.1	4.5	5.2	2.9	4.7	5.3	5.1
Business / leisure	0.9	0.5	0.6	0.5	0.4	0.9	0.8	0.8
Other <sup>1)</sup>	1.0	0.9	0.9	0.9	1.1	0.5	0.8	0.7
Business only / Convention	0.4	0.4	0.4	0.8	0.6	0.6	0.4	0.4
Wedding	0.2	0.4	0.4	0.4	0.1	0.4	0.3	0.6
Events/Festivals	0.1	0.0	0.4	0.0	0.1	0.0	0.0	0.0
Get Married	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

<sup>1)</sup> Other also include incentive and golf

### 3.2.3 TYPE OF ACCOMMODATION USED BY THE VISITORS ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Hotel	58.8	56.0	57.0	58.3	59.7	60.4	59.3	62.1
Timeshare	28.3	31.3	29.5	26.5	27.7	27.2	23.0	23.5
Guest house/Apartment	2.1	2.0	2.8	2.2	2.6	2.3	3.2	1.7
Friends / Relatives	10.0	9.6	9.5	12.1	9.3	9.5	13.6	12.0
Own House	0.4	0.6	0.9	0.6	0.7	0.4	0.5	0.4
Other	0.5	0.4	0.4	0.3	0.2	0.4	0.4	0.4
Condominium	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.4 TRAVEL ARRANGEMENT OF THE VISITORS ( In Percentages )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Pre-paid package	52.9	52.3	50.4	51.5	56.9	56.9	56.2	58.3
Own arrangement	47.1	47.7	49.6	48.5	43.1	43.1	43.8	41.7
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.2.5 SINGLE MOST IMPORTANT SOURCE OF INFORMATION IN MAKING A DECISION TO VISIT ARUBA (In Percentages)

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Friends / Relatives	35.8	42.3	37.6	33.1	38.7	39.5	43.6	45.8
Travel agent	13.8	11.5	16.1	19.9	14.7	12.8	11.3	12.3
Newspaper / magazine	1.3	0.0	0.4	0.4	0.0	0.1	0.1	0.0
Television ad / Radio ad	0.3	0.1	0.3	0.0	0.0	0.0	0.1	0.0
Tourist board	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.0
Other	1.0	1.6	1.6	1.6	1.2	2.0	1.3	1.4
Repeat visit	31.3	30.5	32.2	29.3	31.2	30.8	31.1	25.7
Cruise	1.9	0.4	0.4	0.4	0.2	0.4	0.2	0.5
Internet	13.8	12.4	10.9	14.4	13.3	13.2	11.1	12.7
Business	0.8	1.2	0.6	0.9	0.7	1.2	1.0	1.0
Unknown	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**3.2.6. USERS OF TIMESHARE PROPERTIES: OWNERS VS. NON-OWNERS ( In Percentage of total timeshare users)**

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr.1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
Owner	60.7	61.6	62.8	70.5	67.3	64.8	62.8	64.0
<i>Non-timeshare owner:</i>								
Non-owner: Transient (Walk-in)	4.1	2.8	3.0	2.3	3.2	2.9	5.0	4.2
Non-owner: Exchange	14.5	14.8	14.5	13.7	7.4	11.1	10.9	10.2
Non-owner: Other	20.8	20.7	19.9	13.4	22.1	21.2	21.3	21.6
<b>Total Timeshare user</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**3.2.7 TYPE OF FLIGHT USED BY THE VISITORS ( In Percentages)**

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr.1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
Charter	3.8	1.9	1.8	1.6	4.5	3.6	2.0	3.0
Scheduled	96.2	98.1	98.2	98.4	95.4	96.3	98.0	97.0
Own Plane	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0
Other Type of flight	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**3.2.A. CHARACTERISTICS OF THE VISITORS FROM THE U.S.A.****3.2A.1 VISITORS FROM THE UNITED STATES BY THE MAJOR STATES ( In Percentages)**

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr.1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
New York	28.1	27.6	30.0	28.5	28.3	26.7	24.4	23.8
New Jersey	16.0	16.2	17.2	16.9	15.6	15.9	18.3	17.2
Massachusetts	16.0	18.8	15.5	17.8	17.4	15.2	18.8	16.1
Pennsylvania	12.6	11.1	9.3	9.6	11.6	16.0	8.4	12.7
Connecticut	2.5	4.3	2.5	1.5	3.0	3.7	3.3	2.0
Ohio	2.5	1.8	0.9	0.5	1.0	1.2	1.7	1.4
Maryland	1.1	0.9	1.1	1.0	0.6	0.7	1.5	1.2
Michigan	0.8	1.1	1.2	0.5	0.6	0.6	1.0	0.5
Illinois	5.9	3.9	3.1	4.0	5.6	2.9	3.8	5.0
Florida	2.0	0.9	2.6	3.1	1.6	2.1	2.8	4.3
North Carolina	2.2	3.3	2.3	3.6	0.6	1.0	1.2	2.5
New Hampshire	1.1	1.1	0.5	0.5	1.5	1.1	0.3	0.5
Other States	9.4	9.0	13.9	12.6	12.8	13.0	14.7	12.8

Source: Tourist Survey - Central Bureau of Statistics - Aruba

**3.2A.2 NUMBER OF VISITS OF VISITORS FROM THE UNITED STATES TO ARUBA ( In Percentages)**

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr.1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
First time	47.6	49.9	42.5	47.3	44.9	42.5	43.7	45.5
2 to 5 times	20.7	18.8	24.6	26.6	21.6	25.3	23.7	26.6
6 times or more	31.6	31.3	32.9	26.1	33.5	32.2	32.6	27.9
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3. SATISFACTION OF THE VISITORS

#### 3.3.1 RATING FROM 1 TO 10 OF OVERALL VISIT TO ARUBA:

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
6	0.4	0.4	0.1	0.1	0.4	0.6	0.1	0.1
7	2.9	2.0	1.7	1.6	1.5	3.6	3.4	1.8
8	13.2	14.2	14.7	11.3	11.5	23.4	24.6	18.2
9	52.6	49.4	49.3	52.6	52.5	46.0	49.9	54.3
10	30.9	33.8	34.1	34.3	34.1	26.4	21.9	25.7
<b>Mean</b>	<b>9.10</b>	<b>9.14</b>	<b>9.15</b>	<b>9.18</b>	<b>9.18</b>	<b>8.94</b>	<b>8.90</b>	<b>9.04</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 3.3.2 RATING OF SERVICE RELATED TO THE FOLLOWING:

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr.1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
<b><u>ACCOMMODATION</u></b>								
Excellent	78.9	72.7	80.7	78.4	79.4	70.6	77.3	79.4
Good	19.0	24.9	17.4	20.0	19.4	27.0	21.7	20.2
Average	1.2	1.0	0.4	0.8	0.2	1.3	0.4	0.4
Poor	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Unknown / n.a.	1.0	1.4	1.6	0.8	1.0	1.0	0.6	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>MEALS &amp; DRINKS</u></b>								
Excellent	73.6	65.1	73.6	71.6	68.9	60.0	62.6	66.0
Good	24.8	33.0	25.5	26.6	29.0	37.7	35.6	32.1
Average	1.7	1.8	0.9	1.8	2.1	2.3	1.7	2.0
Poor	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0
Unknown / n.a.	0.0	0.2	0.0	0.0	0.0	0.0	0.1	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>LOCAL TRANSPORTATION</u></b>								
Excellent	57.5	49.6	53.5	46.8	55.5	42.3	34.7	33.2
Good	37.6	44.5	37.9	46.8	39.2	51.5	54.4	58.5
Average	0.3	0.4	0.3	0.9	0.4	1.0	0.4	1.1
Poor	0.0	0.1	0.1	0.0	0.0	0.1	0.0	0.0
Unknown / n.a.	4.5	5.3	8.3	5.4	4.9	5.1	10.5	7.3
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>SHOPPING</u></b>								
Excellent	55.6	50.0	54.2	45.2	51.5	35.8	28.2	28.2
Good	38.3	44.9	41.0	50.8	41.7	56.5	61.5	65.3
Average	1.5	1.0	0.8	1.2	1.6	3.7	3.2	2.4
Poor	0.0	0.2	0.0	0.0	0.0	0.2	0.2	0.1
Unknown / n.a.	4.6	4.0	4.0	2.8	5.2	3.7	7.0	4.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>ENTERTAINMENT / RECREATION</u></b>								
Excellent	54.9	47.3	49.9	42.2	52.6	35.1	31.3	30.3
Good	40.5	47.8	43.8	54.4	44.4	57.3	59.9	64.3
Average	0.4	0.8	0.3	1.2	0.4	1.4	0.5	0.8
Poor	0.0	0.0	0.2	0.1	0.0	0.1	0.1	0.0
Unknown / n.a.	4.2	4.1	5.9	2.0	2.7	6.1	8.2	4.5
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>QUALITY OF SERVICE</u></b>								
Excellent	72.1	66.0	71.9	65.4	66.7	56.1	64.8	59.8
Good	27.4	32.9	27.9	33.5	32.1	42.5	34.5	38.7
Average	0.4	0.9	0.2	1.2	1.1	1.2	0.7	1.1
Poor	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.1
Unknown / n.a.	0.0	0.1	0.1	0.0	0.1	0.2	0.0	0.4
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3.3 RATING OF VALUE FOR MONEY OF THE FOLLOWING:

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
<b><u>ACCOMMODATION</u></b>								
Excellent	21.0	17.6	24.0	16.5	35.3	36.7	52.4	31.6
Good	77.3	78.7	74.4	80.3	61.8	58.7	47.0	66.7
Average	1.7	3.2	1.6	3.1	2.9	3.9	0.6	1.7
Poor	0.0	0.5	0.0	0.0	0.0	0.8	0.0	0.0
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>MEALS &amp; DRINKS</u></b>								
Excellent	13.3	14.2	22.9	11.8	23.4	20.6	21.4	15.9
Good	80.9	79.2	71.8	81.4	68.9	70.7	71.7	79.7
Average	5.0	6.4	5.1	6.5	7.6	8.1	6.6	4.2
Poor	0.9	0.2	0.3	0.4	0.1	0.6	0.3	0.3
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>LOCAL TRANSPORTATION</u></b>								
Excellent	22.4	21.7	33.0	16.5	27.4	22.1	22.7	16.5
Good	75.6	74.0	65.3	80.5	70.3	73.5	75.0	81.5
Average	1.6	4.0	1.6	2.7	2.2	4.4	2.3	1.8
Poor	0.4	0.3	0.1	0.3	0.1	0.0	0.0	0.1
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>SHOPPING</u></b>								
Excellent	22.4	25.3	36.8	16.8	24.1	15.7	13.6	10.6
Good	73.1	68.9	61.5	80.8	70.7	74.6	76.9	85.9
Average	4.1	5.4	1.7	2.2	5.1	8.9	9.0	3.6
Poor	0.3	0.3	0.0	0.2	0.0	0.9	0.5	0.0
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>ENTERTAINMENT / RECREATION</u></b>								
Excellent	22.4	25.3	36.8	16.8	23.4	17.1	17.9	9.9
Good	73.1	68.9	61.5	80.8	72.8	78.1	78.1	88.2
Average	4.1	5.4	1.7	2.2	3.7	4.4	4.0	1.7
Poor	0.3	0.3	0.0	0.2	0.1	0.4	0.0	0.1
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b><u>QUALITY OF SERVICE</u></b>								
Excellent	32.4	36.6	46.1	30.4	35.7	33.0	46.1	34.0
Good	66.7	60.0	53.5	67.2	61.9	64.4	52.4	64.0
Average	0.9	3.1	0.5	2.3	2.4	2.4	1.5	1.8
Poor	0.0	0.3	0.0	0.1	0.0	0.2	0.0	0.2
Unknown / n.a.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 3.3.4 PLACES VISITED BY THE VISITORS WHILE IN ARUBA (In %)

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Visit museum	2.8	3.7	2.7	4.0	10.3	13.4	7.5	5.4
Visit Historical buildings	21.0	18.5	21.8	10.4	19.0	18.7	29.6	22.8
Visit Historical sites	40.0	39.6	41.1	34.1	43.9	34.7	43.2	36.2
Visit Art galleries	1.2	2.1	1.9	0.7	3.4	3.7	4.9	2.9
Took cultural tours	1.5	2.0	1.4	1.0	1.9	2.2	3.7	2.7
Attended festival or concert	17.9	11.6	18.8	9.1	21.1	19.2	29.0	21.7
Visit beaches	96.1	96.4	95.6	95.3	96.9	96.5	96.5	96.2
Visit center of Oranjestad	93.4	91.3	93.8	88.7	90.2	93.3	80.2	88.4
Visit Franse Pas	11.1	15.2	16.6	7.8	14.4	15.0	24.8	16.8
Visit Restaurants outside the hotel	62.1	58.9	63.2	56.7	56.7	59.4	60.9	59.1
Saw Hotels shows	16.4	23.6	24.9	11.3	26.7	17.6	28.4	21.2
Made Island tour	63.1	61.5	63.2	59.6	66.9	59.1	63.0	61.5
Visit National park	38.6	35.9	36.6	33.5	42.9	32.7	42.5	30.7
Visit North Coast	57.3	57.1	60.9	58.3	66.4	55.4	62.8	59.8
Architecture	11.8	6.5	10.3	8.0	30.2	33.7	40.1	44.3
Visit rock formation	45.0	45.6	48.9	38.9	52.8	44.1	48.6	39.6
Visit San Nicolas	57.0	49.7	58.7	56.7	66.5	57.8	65.3	59.8
Visit shopping malls	93.3	91.9	92.3	94.5	91.3	85.6	90.8	91.0
Other	10.9	13.3	10.6		11.5	11.3	10.7	9.0

Source: Tourist Survey - Central Bureau of Statistics - Aruba

## 4.0. MONEY ASPECTS OF THE VISITORS

### 4.1 AVERAGE DAILY EXPENDITURE SPENT IN ARUBA PER CATEGORY <sup>1)</sup> ( In US\$ )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Accommodation <sup>2)</sup>	10.62	7.61	10.28	11.75	9.04	9.33	8.79	8.01
Food & beverage	21.23	24.37	19.96	18.96	18.70	20.97	19.33	18.97
Groceries / sundries	3.76	3.69	3.07	3.01	2.97	3.31	3.10	3.38
Entertainment / recreation	9.36	10.12	7.44	7.50	8.54	8.00	7.83	7.68
Taxis	3.71	6.79	3.27	3.20	3.10	3.05	3.21	3.43
Car rental	4.82	23.05	5.52	5.02	5.12	4.90	5.55	5.52
Public transportation	0.28	0.20	0.20	0.22	0.25	0.18	0.19	0.19
Tax free shopping	2.76	1.98	1.37	3.30	2.28	2.27	2.53	3.08
Shopping	19.40	16.90	20.52	24.05	18.94	19.27	20.61	24.49
Casinos	12.72	14.93	10.22	13.64	14.64	13.36	10.51	11.55
Internet/Telephone	0.39	0.16	0.10	0.06	0.23	0.24	0.08	0.09
Other <sup>3)</sup>	0.69	0.61	0.43	0.26	0.33	0.47	0.71	0.27
<b>Total (In US\$)</b>	<b>88.56</b>	<b>90.20</b>	<b>80.62</b>	<b>88.09</b>	<b>84.12</b>	<b>85.37</b>	<b>82.43</b>	<b>86.65</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

Notes: ( Note 1 apply to all expenditures mentioned in the tables regarding expenditures)

1) The expenditures above mentioned are expenditures that were made while the visitors were IN ARUBA, excluding anything spent on pre-paid package outside

2) The expenditure category "accommodation" does not include any expenses made on a pre-paid package for accommodation.

3) The expenditures belonging to the category "other" also includes expenditures which are unknown or that that could not be specified by the interviewed visitor  
For this reason the amount does not represent expenditures belonging to the category "other" only.

### 4.2 AVERAGE DAILY EXPENDITURE BY PLACE OF RESIDENCE <sup>1)</sup> ( In US\$ )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
United States	88.88	95.11	75.19	83.64	85.95	81.19	78.78	82.88
Venezuela	142.65	123.93	140.49	150.57	136.19	144.22	113.31	143.56
Netherlands	52.58	43.58	43.45	41.03	50.31	47.21	65.43	58.03
Netherlands Antilles	97.54	69.50	76.64	113.66	78.45	84.14	89.87	73.21
Brazil	97.54	69.01	66.69	70.41	103.85	91.45	83.77	89.63
Canada	49.95	57.46	59.47	49.49	48.34	56.37	50.56	52.31
Colombia	83.88	91.80	64.39	64.95	65.53	87.21	83.49	62.13
Other	92.04	69.65	53.80	71.25	70.49	70.25	58.37	54.55
<b>Total visitors</b>	<b>88.56</b>	<b>90.20</b>	<b>80.62</b>	<b>88.09</b>	<b>84.12</b>	<b>85.37</b>	<b>82.43</b>	<b>86.65</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 4.3 AVERAGE DAILY EXPENDITURE BY PURPOSE OF VISIT ( In US\$ ) <sup>1)</sup>

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Vacation	89.47	85.55	81.41	89.00	85.13	85.61	83.12	85.32
Honeymoon	77.09	86.82	84.42	103.17	72.52	75.44	69.19	86.14
Visit friends / relatives	53.87	43.09	58.80	56.37	37.55	48.89	70.48	67.72
Other	82.58	89.67	52.08	54.33	46.43	138.23	87.75	66.61
Business & leisure	191.88	146.03	168.12	132.27	149.44	190.91	124.09	312.2
Business Only / Convention <sup>2)</sup>	98.48	105.83	94.05	181.76	194.12	212.38	117.83	218.57
Wedding	41.14	32.48	95.39	48.74	130.00	41.76	61.44	68.01

Source: Tourist Survey - Central Bureau of Statistics - Aruba

1) Expenditures belonging to the categories Incentives and Golf are based on a very small sample and therefore has been left out.

2) The expenditure belonging to the category "Other" and "Business Only / Convention" are based on a small sample and therefore may not be very representative.

### 4.4 AVERAGE DAILY EXPENDITURE BY NUMBER OF VISITS TO ARUBA <sup>1)</sup> ( In US\$ )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
First time	76.58	87.16	70.78	76.13	71.20	75.34	71.05	70.32
Between 2 and 5 times	97.62	89.82	84.92	88.65	89.85	93.78	90.85	102.89
6 Times or more	100.52	95.28	90.11	109.21	101.69	92.95	92.58	99.43

Source: Tourist Survey - Central Bureau of Statistics - Aruba

### 4.5 AVERAGE DAILY EXPENDITURE BY YEARLY HOUSEHOLD INCOME LEVEL <sup>1)</sup> ( In US\$ )

	Qtr. 1 2011	Qtr. 2 2011	Qtr. 3 2011	Qtr. 4 2011	Qtr. 1 2012	Qtr. 2 2012	Qtr. 3 2012	Qtr. 4 2012
Less than US\$20,000	71.32	60.50	56.46	59.83	52.29	60.29	61.20	73.89
US\$20,001 - US\$30,000	79.07	73.33	69.04	73.50	69.08	77.24	76.16	88.25
US\$30,001 - US\$50,000	76.33	59.50	64.46	76.34	76.55	80.92	85.21	68.78
US\$50,001 - US\$75,000	81.28	72.29	78.14	82.59	75.09	87.10	82.70	88.03
US\$75,001 - US\$100,000	90.25	92.65	92.53	96.51	108.32	91.04	80.79	96.35
US\$100,001 and over	116.99	132.58	117.45	122.13	118.66	108.15	102.42	112.62

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.6 HOW MANY PERSONS DOES THE EXPENDITURE COVERS

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
Adults	2,256	2,231	2,341	2,274	2,294	2,229	2,296	2,257
Children	192	149	292	129	150	163	282	119
<b>Total</b>	<b>2,448</b>	<b>2,380</b>	<b>2,633</b>	<b>2,403</b>	<b>2,294</b>	<b>2,392</b>	<b>2,578</b>	<b>2,376</b>

Source: Central Bureau of Statistics - Aruba

#### 4.7 HOTEL RELATED STATISTICS

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
<i>Hotel :</i>								
Occupancy	83.6%	70.4%	75.4%	68.8%	82.5%	75.1%	80.5%	76.7%
Average Daily Rate	\$238.69	\$173.49	\$160.87	\$195.86	\$255.83	\$180.63	\$167.03	\$196.42
Revenue per available room	\$199.55	\$122.16	\$121.24	\$132.65	\$211.02	\$135.69	\$134.43	\$150.71
<i>Timeshare :</i>								
Occupancy	88.5%	78.8%	79.9%	80.4%	85.5%	75.1%	79.3%	77.7%
Average Daily Rate	\$232.31	\$161.01	\$156.48	\$162.81	\$214.31	\$150.76	\$136.42	\$145.63
Revenue per available room	\$26.10	\$19.22	\$16.25	\$14.28	\$20.91	\$18.37	\$20.33	\$18.71
<i>Total :</i>								
Occupied Room Nights	564,876	488,729	502,545	483,012	551,788	495,162	527,860	513,445
Occupancy	85.9%	74.1%	77.4%	73.3%	83.9%	75.1%	79.9%	77.2%
Average Daily Rate	\$238.03	\$172.01	\$160.44	\$192.87	\$251.73	\$176.75	\$162.62	\$189.61
Revenue per available room	\$119.60	\$76.74	\$74.99	\$81.25	\$119.59	\$79.42	\$80.13	\$87.28
<b>Total Room Revenue</b>	<b>\$78,666,496</b>	<b>\$50,590,752</b>	<b>\$48,709,262</b>	<b>\$53,578,693</b>	<b>\$78,603,787</b>	<b>\$52,346,147</b>	<b>\$52,920,691</b>	<b>\$58,068,237</b>

Source: Central Bureau of Statistics - Aruba

#### 4.8 AVERAGE EXPENDITURE PER PERSON PER TRIP BY THE MAJOR MARKETS 1) ( In US\$ )

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
United States	666.60	702.86	569.94	625.63	672.13	617.04	571.94	611.65
Venezuela	841.64	694.01	849.96	847.71	815.78	816.29	714.99	776.66
Netherlands	515.28	580.49	513.14	442.30	552.40	524.98	772.73	608.73
Netherlands Antilles	536.47	323.87	428.42	484.19	404.02	381.15	447.55	337.50
Brazil	624.26	567.26	437.49	487.24	762.26	625.52	603.98	608.59
Canada	394.61	415.44	456.73	380.08	372.22	413.19	385.27	364.08
Colombia	587.16	726.14	404.37	535.19	542.59	655.82	766.44	459.14
Other	892.79	653.32	461.60	572.85	711.95	594.32	531.75	538.41
<b>Total visitors</b>	<b>673.06</b>	<b>686.42</b>	<b>607.87</b>	<b>646.58</b>	<b>664.55</b>	<b>639.42</b>	<b>614.93</b>	<b>633.41</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba

#### 4.9 TOURISM EXPENDITURE IN ARUBA BY THE MAJOR MARKETS 1) ( In 1,000 US dollars )

	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4
	2011	2011	2011	2011	2012	2012	2012	2012
United States	97,038.30	97,917.94	70,506.16	76,662.48	97,061.48	84,892.30	71,670.15	75,632.29
Venezuela	14,726.09	16,794.30	35,677.26	28,963.68	18,528.77	23,126.99	34,159.18	34,468.15
Netherlands	5,099.25	5,458.31	5,401.87	4,530.07	5,747.76	4,863.37	8,236.51	5,871.25
Netherl. Antilles	2,479.03	2,000.54	3,464.61	3,335.11	2,085.54	2,952.80	3,225.06	2,445.51
Brazil	3,620.68	2,419.37	2,794.66	2,903.93	4,127.63	2,579.64	3,632.35	3,357.58
Canada	7,142.75	2,905.56	2,330.69	3,910.68	6,513.82	3,215.87	2,891.43	4,769.05
Colombia	1,819.02	3,665.54	1,544.69	2,535.19	1,833.41	2,964.30	3,264.26	2,740.61
Other	13,847.14	11,165.84	11,151.89	10,197.30	11,154.10	10,306.61	13,268.24	10,447.28
<b>Total visitors</b>	<b>148,136.26</b>	<b>145,857.81</b>	<b>136,022.32</b>	<b>137,476.61</b>	<b>149,290.71</b>	<b>138,556.84</b>	<b>143,696.94</b>	<b>144,995.49</b>

Source: Tourist Survey - Central Bureau of Statistics - Aruba



### 6.1. Purpose of the Tourist Survey

#### 6.1.1. Background of the Tourist Survey

Tourism has become one of the major economic sources of the island. Therefore, the use of up-to-date, reliable and comprehensive data is imperative for a successful operation in both the public and private sector.

In order to improve the product and implement new marketing strategies, it is important for the policy makers to determine the characteristics of the visitors; why they choose Aruba as their destination, who they are, where they come from, how much they spend during their stay and how satisfied they are with the product Aruba. The survey also provides detailed socio-economic characteristics of the visitors, which are important for the definition of appropriate target groups.

The Tourist Survey will continue during 2012 and on and will take place the third Saturday of every month during the year for a period of one week. Some of the results of the surveys will be presented in quarterly publication, called Tourist Profile, together with other tourism information. Every year a final report will be presented in order to give a total view of the visitors. This report will also present the total result of the 5 past surveys.

#### 6.1.2. Purpose of the Tourist Survey

The Tourist Survey provides the following information:

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

The results of the Tourist Survey will enable us to:

1. Analyze existing trends and market developments in tourism
2. Produce the expenditure patterns of the visitors divided into their place of residence and other characteristics
3. Provide information on the country's image among visitors

### 6.2. Methodology of the Tourist Survey

#### 6.2.1. Set up of the survey

The Tourist Surveys took place every third Saturday of the month and had a duration of one week every month. They were held in the Departure Hall of the Queen Beatrix International Airport. The questionnaires were filled out by the interviewers, whom were highly qualified to do this work and received intensive training by staff members of the Central Bureau of Statistics prior to the fieldwork. The training included how to locate, identify, contact, greet and examine the respondents, as well as how to record responses and terminate the interview. Above all, they were instructed on the importance of following instructions and procedures for the interviews.

In the year 2012 a total of 4,510 questionnaires were filled out throughout the four quarters of the year 2012 by the Central Bureau of Statistics interview team. We chose for face-to-face interviews, due to the fact that this approach gives a higher response. Advantages of a face-to-face interview in a departure hall of the airport are:

1. All visitors leaving the island by air must come by
2. It can provide extensive information on their expenditures

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

#### 6.2.2. Definitions

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

##### 6.2.2.1. Tourism

##### *Tourism Expenditure in Aruba:*

The total consumption expenditure made by visitor (during his/her stay in Aruba) or on behalf of a visitor for and during his/her trip and



stay at destination. Tourism expenditure encompasses a wide variety of items, ranging from the purchase of consumer goods and services inherent in travel and stays to the purchase of small durable goods for personal use, souvenirs and gifts for family and friends. The purchases which should be excluded are:

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

#### *Total Tourism Expenditure:*

All travel related expenditures made by stay-over visitors, before, during, and immediately after a trip. The total tourism expenditure is the tourism expenditure in Aruba plus the estimated accommodation part of pre-paid packages.

#### *Visitor:*

Any person traveling to a place other than that of his usual environment for less than 12 consecutive months and whose main purpose of travel is one other than the exercise of a remunerated activity from within the place visited.

#### *Purpose of Visit:*

The main purpose of visit refers to the reason in the absence of which, the trip would not have taken place or the given destination would not have been visited. The data will be presented for the following groups:

##### *Vacation*

A trip mainly undertaken for relaxation. It is the visitor who decides to take the tourist trip as an activity disconnected with his/her occupation, where the trip is usually financed by household funds.

##### *Honeymoon*

This can be considered as a vacation with the difference that the travel party consists of a couple who has just gotten married and is celebrating that important event of their lives by means of vacation.

##### *Visit friend/relative*

These are the so-called social visits. They are usually undertaken for relaxation, just as a vacation. There are, however, other reasons to

visit friends and relatives, such as taking care of them when they are ill, or assisting them with work in and around their house.

##### *Golf*

They usually go to a destination which can offer them a good golf course, where their main purpose of visiting is to play golf most of the time at that particular destination.

##### *Business & Leisure*

It comprises all business and professional activities outside the usual environment. The visitor takes the tourist trip because of requirements related to his/her occupation or the economic activity of the production unit for which he/she works. Furthermore, the decision to take the trip and the financing of it, are decisions often made by someone other than the business traveler. Afterwards they will add a holiday to their trip, that way having two purposes.

##### *Place of Residence:*

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

##### *Multi-Destination Trips:*

These are the visitors that overnight at more than one destination during their trip.

##### *Accommodation:*

Refers to any facility that regularly provides overnight accommodation to tourists. Data will be presented in the following way:

##### *Hotel*

Hotels are typified as being arranged in rooms, exceeding a specified minimum, coming under a common management and providing certain services, including room service, daily bed-making and cleaning of sanitary facilities.

##### *Guest house*

Can be considered a private accommodation, due to the fact that the dwellings are rented from private individuals or professional agents.

##### *Friend/Relative*

This can be considered a private accommodation where the tourist stays with the family that usually lives in the home and where the tourist does not pay a room charge.

#### *Apartment/Villa*

This unit group comprises accommodation arranged in rooms, providing limited hotel services including daily bed-making and cleaning of the room and sanitary facilities.

#### *Timeshare resort*

This unit group consists of establishments that, besides providing accommodation, have another specialized function. The visitor can buy a time share interval of the resort and this gives him/her the right to stay one or more weeks each year at the resort. On a yearly basis he/she has to pay a certain amount for maintenance fee.

#### *Charter:*

These are to be considered non-scheduled flights. Usually they are cheaper than the scheduled flights and operate only during a certain period of time to a particular destination.

#### *Package Tour:*

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

#### *Yearly household income:*

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

The data will be presented in the following format:

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

#### **6.2.2.2. Occupation**

Occupation refers to the kind of work done, by the person employed. To classify the data on occupation, the International Standard

Classification of Occupation (ISCO-88) has been used. The ISCO provides a systematic classification structure which encompasses all occupations of the economically active population. The classification structure consists of four levels: major groups, sub-major groups, minor groups and unit groups. There are ten major groups.

The ten major groups of the SCO classification are:

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

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

#### **1. Legislators, senior officials, and managers**

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

#### **2. Professionals**

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

#### **3. Technicians and associate professionals**

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

#### 4. Clerks

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

#### 5. Service workers and shop and market sales workers

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

#### 6. Skilled agricultural and fishery workers

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

#### 7. Craft and related trades workers

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

#### 8. Plant and machine operators and assemblers

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

#### 9. Elementary occupations

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

#### 0. Armed forces

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

#### 00. Not economically active population

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

### 6.2.3. Preparation of the Tourist Survey

The preparation of the first survey started in January 1996. The questionnaire was prepared together with the partners who evaluated the questions and together this resulted into the questionnaire (available upon request). The questionnaire was originally prepared in both English and in Spanish. Prior to the first fieldwork the questionnaire was tested and revised.

For the training session of the interviewers a manual was prepared in which explanations were given on how to conduct the survey.

Nowadays the survey takes place digitally by means of notebooks using the software CSPro to collect the necessary data corresponding with the questionnaires used (as explained in the Preface).

### 6.2.4. Sampling

One of the aims of this survey is to gather information on the different segments of our tourist market. This implicates the use of a stratified sampling method. After evaluating the feasibility of the different random and non-random techniques, we chose the quota sampling. It is a non-random sampling method, usually used in opinion and market research surveys. In that case it is not based on principles of the probability theory, therefore sampling-error formulas cannot be applied, with confidence, to the results of quota samples and generalization of the results, to certain extend, is not possible. On the other hand, this survey offers information that is hardly available in Aruba. For this reason, some generalizations are

made while keeping in mind that the results are assumptions based on the surveys.

The sampling size was fixed at 1.125 respondents per survey (quarter). The stratification of the population is based on the place of residence of the visitors. To determine the quotas of the sample, the relative distribution of the visitors throughout the quarters of the last year has been used.

The 1125 respondents were evenly distributed over a period of three months which represents the survey period. To enable them to plan their interviews, the interviewers were provided with flight schedules. Each interviewer filled in approximately 20 forms per day.

### **6.2.5. Fieldwork**

The fieldwork starts every third Saturday of the month. Due to the fact that the interviewers were instructed to carefully select respondents according to the sampling plan as indicated above, they were supervised by a Central Bureau of Statistics team. In case they encountered problems for which they were not prepared they could request assistance.

At the end of each period the completed questionnaires are downloaded by the Central Bureau of Statistics and a procedure is followed in order to evaluate the data on four areas:

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

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

### **6.2.6. Data Processing and Analyzing**

The department of Tourism Statistics is responsible for the verifying, coding, data-entry and editing of the questionnaires while the department of Research and Projects helps with the data-entry programs. The editing consists of execution of validity and consistency tests. Variables related to expenditures during and/or prior to people's visit are checked for data-entry errors. The use of outlier has not been applied since the 1997 expenditure survey data. The

outliers are unusual large or small observations relative to the other values in the data set.

According to the WTO (World Tourism Organization), these unusual large or small observations can also happen in reality and for this reason should not be left out of the set of data. Instead of using the outlier, the data on the questionnaires are double checked for errors. Frequencies are run to the data and a cumulative percentage is applied to it. The data set appearing between the percentages 95 to 100 were checked for consistency and double checked for data-entry errors. After correction of the mistakes or confirmation of correct answers, the data set was ready to be used. Finally different tables were made.

WTO also states that a visitor is any person traveling to a place other than that of his usual environment for less than 12 consecutive months and whose main purpose of travel is one other than the exercise of a remunerated activity from within the place visited. In Aruba, immigration rules states that a visitor is not allowed to stay in Aruba for more than 3 months.

When we calculated the average length of stay of the visitors, we only included visitors who stayed less than 3 months in Aruba. In general, most of the visitors who come to Aruba stay less than 3 months and stay in a hotel or a timeshare property. We applied the rule of the immigration when we calculated the average length of stay because we want to avoid that an interviewee visitor who stayed more than 3 months in Aruba stayed for purposes other than tourism.

Necessary to know is the fact that expenditure category "other" includes expenditures which do not only belong to this category, namely expenditures which amount were unknown or not remembered by the interviewed visitor.

### **6.2.7. Elevating total expenditures to a macro total - Total Tourism Expenditure**

Here follows a brief description of the method used to bring the tourism expenditures to a macro total by calculating and imputing the accommodation part of pre-paid packages. The objective of imputing a value for pre-paid accommodation is to elevate the expenditure total to a macro total as best as possible in order to have a better idea of the development of the total picture of tourism expenditures or total tourism expenditure. This estimated total tourism expenditure will also be incorporated



into the system of national accounts of Aruba. and the estimated total tourism expenditure as a concept is also better comparable to tourism receipts as measured by the Central Bank of Aruba.

It is appropriate to mention that the tourism expenditures gathered by the TES (Tourist Expenditure Survey) consist of expenses made by interviewed visitors who came with a pre-paid package and interviewed visitors who came with their own arrangements. Up to now, the reported expenditures of visitors who came with their own arrangements and of visitors who came with a pre-paid package are only expenses made while the visitors were in Aruba.

Other than that, (of the visitors that came with a pre-paid package) about 99% of the packages included accommodation. For this reason the effort to impute the accommodation part of pre-paid packages. Excluded from tourism demand are expenses made in a pre-paid package for goods or services other than accommodation as, for example, transportation, meals and drinks, tours, etc.

The following procedure was used to impute a value and to calculate the accommodation part of a pre-paid package. The value used per individual accommodation property is their respective ADR's pertaining to their respective quarters. This ADR is gathered from the accommodation properties who are member of AHATA (See Occupancy and other hotel statistics included in the methodology). For the properties for which we did not have an ADR, one has been imputed for them based on the average of the category that the resort belongs to.

After the imputation, two variables are calculated per individual accommodation property with the conditions that the interviewed visitors came to Aruba with a pre-paid package and that the package included accommodation. The variables are: price of the accommodation property and total number of night spent by the interviewed visitors in Aruba. The accommodation property can only be a hotel or a timeshare property in this case. Two other variables used are the total number of occupied room nights per individual hotel and the total number of nights the interviewed visitors stayed in Aruba per individual hotel. All these variables are calculated per quarter. The number of night of interviewed visitors who

came with a package including accommodation is then divided by the total number of night of all interviewed visitors in order to get the market share percentage of each property. This is then multiplied by the price and the number of occupied room nights of each property which delivers the pre-paid accommodation expenses per individual accommodation property. The addition of the pre-paid accommodation expenses added to the total expenditures in Aruba is then the total tourist demand of the visitors per quarter.

#### **6.2.8. Comparison of Total Tourism Expenditures and Tourism Receipts**

In the following some (possible) important differences is presented by illustrating the measurement and the operationalization of the two concepts.

##### *Unit of analysis*

Tourism demand as well as tourism receipt concentrates on the total purchase of tourist related goods and services. However, each one approaches the purchase from a different point of view. Whereas tourism demand concentrates on the demand of tourism related products, tourism receipt concentrates on the supply of tourism related products. Both are expressed in money value.

When measuring the tourism demand, the unit of analysis is the visitor. The expenditure of the visitors is one of the variables being measured. When measuring tourism receipt, the unit of analysis are the receivables in foreign currency from companies that operates in the tourism industry and sells goods and services to visitors. All transactions of these companies which can be related to receipts from tourist purchases constitute the main components of the tourism receipts as measured by the Central Bank of Aruba.

Ideally, the amount spend by visitors on tourism related goods and services (demand) should be equal to the amount received by companies for the tourism related goods and services sold to visitors (supply). However, balancing these two indicators proves to be difficult due to the difference in the registration method, among others.

##### *Difference in method of registration*

The tourism demand as measured in the survey is directly related to the visitor and the period the visitor was in Aruba as a stay-over visitor. Every dollar spent is related to the visitor from which it came from and the period the visitor was in Aruba. This registration method is on an accrual basis. In contrast, the tourism receipts of the Central Bank are registered on a cash basis. Cash based registration registers (the moment of) payment for tourism related products as reported by local exchange banks as well as the foreign (bank) accounts held by residents. There is no direct relation to the period in which these goods and services -- already paid for -- were used by the visitor who paid for them.

The difference in registration makes a straight forward comparison of the two figures difficult. On the basis of the Banks figure on tourism receipts per quarter or per year one can only deduce the amount of money Aruba received from tourism related goods and services within that period. Nothing can be concluded about the number of person(s) that paid for these goods and services and when they were consumed. The tourism demand figures of the Central Bureau of Statistics, on the other hand, are directly related to the period the goods and services were consumed. It can be indicated in which period a certain amount of tourism related goods and services were consumed by visitors. However, no conclusions can be drawn from the Central Bureau of Statistics figure as to when the payments for these products were really received.

The amount of money registered by the Central Bank in a certain period does not necessarily correspond with the amount of money registered by the Central Bureau of Statistics for the same period. The difference in the method of registration leaves enough room for both these concepts to differ from each other.

#### *Population covered*

The population covered by the Central Bureau of Statistics concerns stay-over visitors (stayed in Aruba for at least one night). Statements based on tourism expenditures and tourism demand concerns only stay-over visitors. In contrast, the tourism receipt of the Central Bank covers stay-over visitors as well as cruise visitors.

## **6.2.9 Definitions**

In order to avoid any misunderstandings regarding definitions used in this report please find list of definitions of the most used terms.

### *Number of Rooms*

Total number of guest rooms in the room renting property.

### *Number of Rooms Available*

Number of guest rooms in the room renting property, less permanent house use.

### *Total net revenue*

It is the total net revenue including service charge and net of rebates / wholesalers commission and for time share properties only, net of maintenance fee.

### *Total room nights of occupied rooms*

The amount of nights the rooms were occupied by guest (paid or complimentary)

### *Total room nights of non-revenue rooms*

Total room nights of non-revenue rooms which are vacant or out of order.

### *Total number of guests*

It is the number of registered guests in each category of occupied rooms.

### *Total Room Nights*

It is the total number of rooms available in a property multiplied by the respective number of days in a month.

### *Total room nights of units occupied by owners*

Total room nights of rooms that are occupied by the time-share owner.

### *Total room nights of units occupied by exchange*

Total room nights of rooms that are occupied by a person in an exchange program.

### *Total room nights of units put into rental program/pool*

Total room nights of rooms that are occupied by a person in a rental program / pool or a transient business of a timeshare property.

### *Net Revenue*

Total revenue less allowances constitutes net revenue.

### *Commission*

The amount charged with remuneration to authorized agents for rooms business secured for the hotel including travel agents' commissions.

### *Service Charge*

Charges for services which are added to the customer's bill at a percentage of the sale and are not required to be paid to personnel should be recorded here.

### *Complimentary Rooms*

Those rooms occupied by hotel guests on a gratis basis.

### *Paid rooms occupied*

Rooms occupied by a guest on a paid basis.

### *Vacant rooms*

Are those saleable guest rooms that were not occupied during the period.

### *Out-of-order rooms*

Those rooms removed from salable inventory due to renovation, temporary fault or problem rendering them inadequate for occupancy.

### *Rooms Occupied by guest*

Total paid rooms occupied and complimentary rooms.

### *Non-revenue room*

These are rooms which are vacant or out-of-order.

## **6.3.6 Calculations or formulas**

The different statistics that we calculate based on the data of the room renting properties are:

### *Average Daily Rate (ADR) =*

$$\frac{\text{Total Net Revenue}}{\text{Total Room Nights of Occupied Rooms}}$$

### *Average Occupancy =*

$$\frac{\text{Total Room Nights of Occupied Rooms}}{\text{Total Room Nights}} \times 100$$

### *Average Revenue Per Available Room (RevPAR) =*

$$\frac{\text{Total Room Net Revenue}}{\text{Total Room Nights}}$$

### *Fair Share =*

$$\frac{\text{The Total number of Rooms for a category}}{\text{Grand Total of Rooms}}$$

### *Actual Share =*

$$\frac{\text{Occupied Rooms of an Individual category}}{\text{Grand Total of Occupied Rooms}}$$

Note that the Average Daily Rate for time share properties is calculated by taking their net revenue divided by occupied rooms' nights only. The occupied room nights does not include the rooms sold to time share owners or occupied by exchange since only a maintenance fee is collected on these rooms.

## **6.2.10 Reporting properties**

Properties that are member of AHATA and that are supposed to report to the Central Bureau of Statistics are:

### **Hotels / Hotel style operation**

Occidental Grand Resort  
Amsterdam Manor  
Aruba Marriott Resort  
Aruba Renaissance  
The Westin Aruba Hotel  
B.W. Manchebo Hotel  
B.W. Bucuti Beach Resort  
Talk of the Town  
Grape Holdings (Divi & Tamarijn)  
Holiday Inn  
Hyatt Regency Aruba  
Radisson Aruba  
The Mill Condominiums  
Tierra del Sol

### **Timeshares**

Aruba Beach Club  
Aruba Renaissance Resorts  
Caribbean Palm Village  
Casa del Mar  
Costa Linda Resort  
Divi Village Beach Apartments  
Dutch Village  
La Cabana Beach and Racquet Club Hotel  
Playa Linda Resort  
Aruba Marriott Ocean Club  
Aruba Marriot Surf Club  
The Aruban Resort  
Paradise Beach Village